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AIRLINE MARKETING MIX AND PROMOTION STRATEGIES.

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1. Abstract.

Airlines play a key role in the tourism industry acting as the main facilitator of tourism flows. This study aims to investigate and analyse the main features affecting airlines decisions towards product, price, place-distribution, and promotion, - the so-called 4P's of marketing mix -. Analysing the 4P's of marketing mix for the airline industry, the factors affecting them, how they have evolved in time, and the marketing environment where the airline industry operates, this study provides a theoretical overview on how airlines approach 4P's of marketing mix and how them affect airlines in their strategies and policies. The focus is set on promotion, where a survey has been conducted to ascertain both the key determinant factors affecting consumers' flight ticket purchasing decision process and the extent to which airlines emphasise these key determinant factors in the content of their promotional strategies and marketing campaigns.

2. Introduction.

Considering the essential role played by airlines regarding tourism, being the main facilitator of tourism flows between outbound and inbound markets and countries, allowing and enhancing global economic development and connecting people worldwide, airline industry is a strategic industry that has been historically relevant and necessary for the development of societies, and both international and national economies.

The airline industry is of great importance and interest for the whole world due to the possibilities that it brings for development and connection, and such is the importance of this industry that even governments that, traditionally, have been non-interventionist, try and focus their efforts in protecting airlines if a real threat is perceived (Doganis, 2010) towards the strategic interests of a country.

Air transport activities affect multiple sectors of the economy, and, concerning tourism, the connectivity made possible by air transport activity is at the heart of tourism development (Abdelhady, Fayed, & Fawzy, 2018), providing benefits for all stakeholders involved in the global tourism value chain. Narrowing the approach, given the high dependence of the Spanish economy on tourism, air transport becomes a key vehicle making possible to gather and drive tourism flow to the country, becoming, then, in an essential industry for the country due to the high impact that it has on the Spanish economy.

The demand for the airline product is affected by the marketing mix elements (Camilleri, 2018). Therefore, airlines follow strategies in relation to product, price, place-distribution, and promotion. These strategies followed by airlines involve decisions towards each of these marketing mix elements (Shaw, 2016), commonly called 4P's of marketing, such decisions need to be strategically analysed and measured so that the success and preservation of airlines in the long-term is ensured together with the maximum optimisation of the overall results and performance of airlines in the short-term.

Given all the above-mentioned reasons, as well as all the synergies generated between the airline industry and the tourism sector, it becomes of a great interest to analyse how marketing mix elements affect airlines in their operations and strategies, and how airlines deal with promotion so that they can persuade passengers from competitors to use their services while also maintaining their current customers loyalty and raising the maximum brand awareness in the markets they are present.

3. Contextualization.

Pointed out the essential role that the airline industry plays with regards to the tourism sector, this study aims to provide an overview on how airlines address the marketing mix elements and how these elements determine their marketing policies and strategies. How product, price, place-distribution, and promotion need to be dealt, and, are dealt by airlines is worth of further investigation and research, over a sector, such of the airline industry, considered by many to be one of the most essential elements of tourism development and, thus, of great importance in research terms (Crespo-Almendros & Del Barrio-García, 2016).

Marketing becomes one of the most important activities for airlines with a great percentage of its workforce involved in developing tasks, both directly and indirectly, towards building the customer experience that consumers receive when making use of the services provided by an airline. Not only the core marketing department of an airline is responsible for planning and deploying the marketing strategy of an airline, but a wide range of the staff working in an airline also has to do with marketing as their tasks and performance influence the overall airline image and the perception that consumers get from the airline, and that is marketing too. Consequently, given the relevance of marketing towards the airline industry, to analyse and to review the features affecting airline marketing decisions turn out to be of a great interest for the tourism research field as well as of great interest for further investigations and practical implications to be considered for both the airline industry and the tourism sector.

For this reason, and as stated before, this study intends to conduct a theoretical and generic review of the main features concerning the elements of marketing mix in relation to airlines as well as identifying promotional strategies related to key determinant factors affecting consumers' purchasing decision process carried out by airlines that enable them achieving their corporate objectives and ensuring their existence both in the short and in the long-term.

The current circumstances at the time of completing this study in relation to COVID-19 pandemic and the social, economic and health crisis that the pandemic has caused are not taken into consideration in this study as it is framed and conceived under the normal circumstances in which the industry was established prior the official declaration of the COVID-19 pandemic.

4. Methodology Description.

Provided the objective of this study, the methodology implemented has been based on an information and data obtention process coming from both primary and secondary information sources.

On the one hand, information and data has been obtained from primary information sources through a survey conducted by the author of this study with the aim of determining the key determinant factors affecting flight tickets purchasing decision process as well as determining whether these determinant factors are highlighted in the promotional campaigns carried out by airlines and the extent to which respondents are sensitive to these promotional campaigns. The data collected from this survey has been presented in the survey analysis section together with different promotional and marketing campaigns conducted by different airlines where different strategies and objectives can be perceived. Also, graphical evidence of the survey results is presented in a final annex at the end of this study to provide certainty and support the arguments provided in the analysis.

On the other hand, secondary information sources have been also used as a literature review has been conducted to obtain the information presented in this study. Different sources such as articles and papers found in different economic, advertising, marketing, and air transport management journals, as well as diverse institutions webpages such as IATA and different books from relevant authors in the field of marketing and the airline industry have been consulted to obtain and gather the information which is henceforth presented in this study.

5. Airline Marketing Mix. Introduction to 4P's Model for Airlines.

The demand for the airline product may be affected by the marketing mix elements, including the nature of the product or service, its distribution, its promotional strategies, and its price (Camilleri, 2018). Findings in the study conducted by Abdelhady, Fayed, & Fawzy (2018) indicate that there is a significant positive relationship between the three elements of marketing mix product, promotion and place and passengers' purchasing decision-making. Also, the results revealed that the product was the most important element of the marketing mix affecting the passengers purchasing decision. In contrast, the price was considered the most important feature for the low-cost carriers.

Therefore, according to Shaw (2016), the application of the 4Ps model for airlines involves decisions towards each of these "P's" - product, price, place and promotion -, decisions that need to be strategically analysed for the sake of the success and preservation of airlines in the long-term and optimisation of the overall results in the short-term. Hence, airlines destinate an important part of their budget to marketing and, as Camilleri (2018) points out, "the airlines' marketing policies are influenced by costs and expenses which could influence their levels of service, and their ability to be profitable" (p.191).

To provide a wider review of the concept of marketing, its application to the airline industry, the stages of marketing concerning the airline industry, and the airline marketing environment, a complete introduction to airline marketing is presented in the Annex I. Introduction to Airline Marketing, which can be found at the end of this study. From now on, an analysis of each one of the 4P's – product, price, place, and promotion – will be conducted to discuss how airlines can address each one of these "P's" and what can airlines do in relation to them.



Figure 1: Marketing Mix 4P's

6. Product.

The product of the airline industry is an intangible one which is instantly perishable and cannot be stored. Being an intangible product with many features

surrounding it, the airline product can provide, or fail to provide, customer satisfaction (Shaw, 2016). The task of product planning is a process where an airline decides what product features an airline should offer in each of the markets it operates. As Doganis (2010) points out, each airline controls its own supply of services but can influence the demand only through its product planning, therefore, much depends on product planning.

For airlines, product and service planning is a complex task as product planners or departments in charge of product development must work in different dimensions at the same time. First, they must ensure that the product and service standards of the airline, at least match or, are better than those of their key competitors in the market. They must also try to differentiate the products offered in such a way that passengers feel that they get value for money (Doganis, 2010).

Moreover, when it comes to product planning, Camilleri (2018) highlights that customers' needs and wants are extremely important, however, wants are more important than needs in a highly competitive environment such as it is the airline industry, where many airlines offer similar fares and the same levels of service quality in certain routes.

When planning new products or service improvements, Doganis (2010) suggests three factors that airlines need to bear in mind: - the cost of the innovation, - the marketing benefits that the airline might get benefited from in terms of revenue generation, that is, if the product to be launch is able to provide the necessary revenue for the company, and, - the speed with which this new product or innovation can be copied by competitors in case the new product causes acceptance in the market. Also, when airlines are planning to come up with a new product or service innovation, logistic matters might arise in case that these new product or innovation requires that a part of the airline's fleet needs to be stopped from flying to install these innovations into the airplanes. Hence, airlines do have to consider whether the time for the installation of the innovations is assumable both in economic and logistic terms or not.

In relation to the process of deciding what products to offer, Doganis (2010) suggests the following:

An airline must bear in mind a number of objectives when deciding what products to offer. It must consider its overall marketing strategy, which will have emerged as a result of its demand analyses and forecasts. It must set out to attract and satisfy potential customers in the different market segments, this means using its understanding of the needs and requirements of these different market segments. In brief, the ultimate aim of product planning is to attract and hold customers from the market segments that an airline is targeting and to do this profitably. (p.227)

6.1 Key Product Features Affecting Travel Decisions and Choice of Airline.

To date, airline industry experience and airlines' market knowledge suggest that potential customers or passengers will be influenced by five different key product features (Doganis, 2010). These features are price, schedule, comfort based,

convenience and image. All of them can influence to a greater or a lesser extent to customers and potentials according to the different segments. Airlines are aware of it and when planning a product for a specific segment of their customers or potentials, have always in mind what are the needs and wants of that specific segment in relation to the product feature that the airline is changing or implementing.

Therefore, an airline needs to find the most effective way to combine these product features to meet customer needs in different markets, and this, according to Doganis (2010), involves much dedication and it is a complex task for airlines.

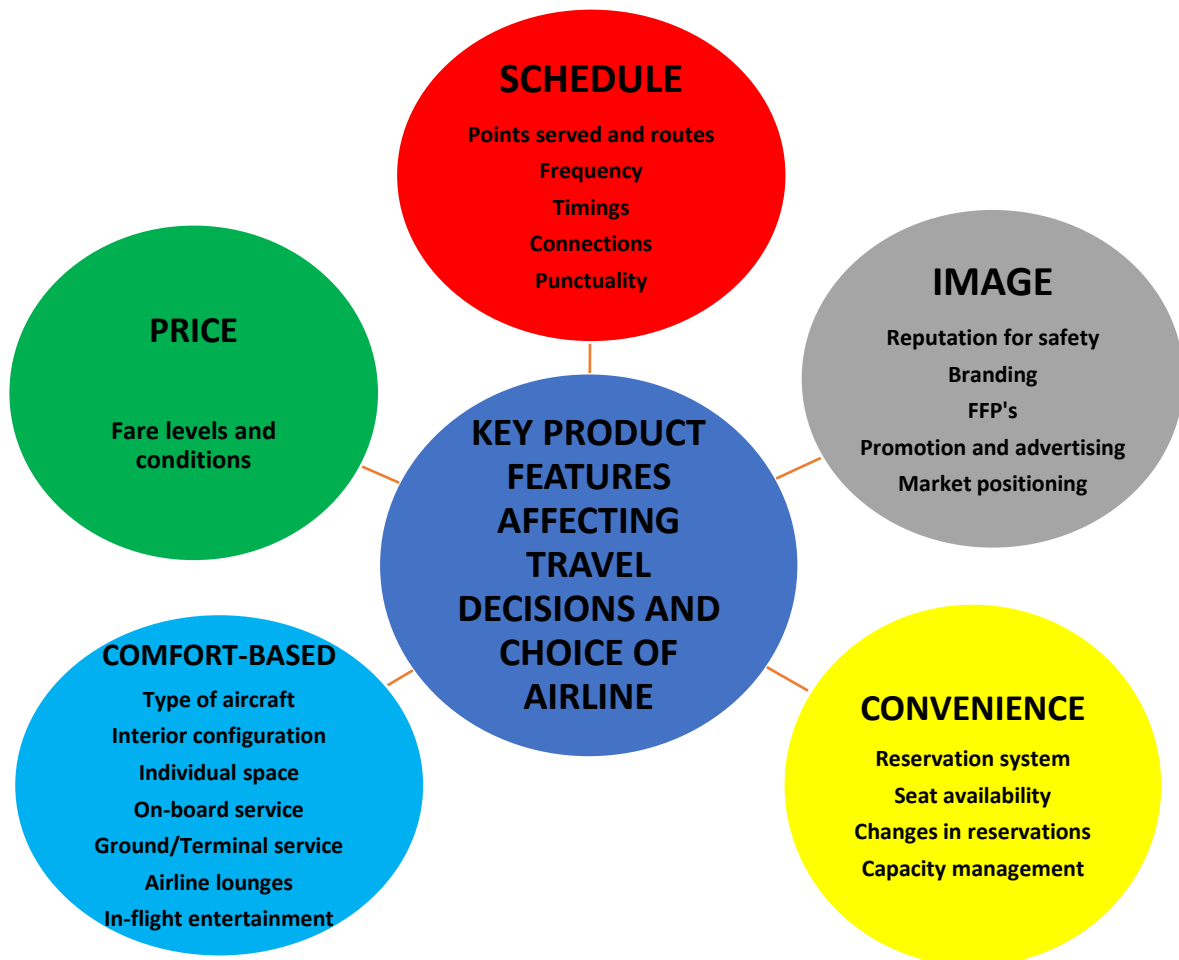


Figure 2: Key Product Features Affecting Travel Decisions and Choice of Airline. Data Source: (Doganis, 2010)

The above airline product features, that become determinant for customers and potentials, can be approached by airlines in many ways or strategies. For instance, when it comes to price, low-cost carriers historically tended to adopt a simple approach on very low fares as their main product feature and relying on such fares to stimulate demand from all market segments without worrying too much about identifying the specific needs of individual segments except in choosing the points to serve (Doganis, 2010). However, as market has evolved, low-cost carriers have also started increasing their concern on developing product features to target specific market segments. Examples of this are Southwest in the United States and EasyJet in Europe who few years ago started

increasing flight frequencies to attract the segment of the business travellers (Doganis, 2010).

Concerning the schedule feature of the airline product, Camilleri (2018) introduces it as an essential feature for airlines and highlights the following:

The schedules plan should satisfy the requirements of the various market segments which the airline targets, therefore the schedules planners require information on their airline customers' behaviours. This data can be obtained from different sources such as airline's marketing research, historic data and so on. Thus, the schedule plans are an attempt to satisfy passengers with regards to time of the day, the day of the week, frequency and so on. Marketing departments from airlines will ensure that the schedule plan will meet and exceed the customers' expectations (p.180).

Equally important is the fact that, from a marketing point of view, the schedule plan is carefully designed as it has an essential role in achieving the objectives of satisfying the requirements of various market segments (Camilleri, 2018). For that reason, departments in charge of designing the schedule plan need to work in line with several areas within the airline to be in a position to design a schedule plan which best supports the airline to achieve its corporate objectives.

Nowadays, given the high level of competition underlying in the industry, the need for product innovation has intensified. Since schedules, in most cases, can be changed only in the medium term, airlines product development has often focused on improving comfort-based features, which according to Doganis (2010), can be changed more readily and quickly. As a result of that, airlines are constantly working on the in-flight service improvements and renewal to differentiate themselves from rivals (Abdelhady, Fayed, & Fawzy, 2018).

When determining passenger perceptions of comfort, there are three aspects which Doganis (2010) suggests that are of the utmost concern for airlines: - interior layout and configuration, - in-flight service and catering standards, and - services offered to passengers on the ground.

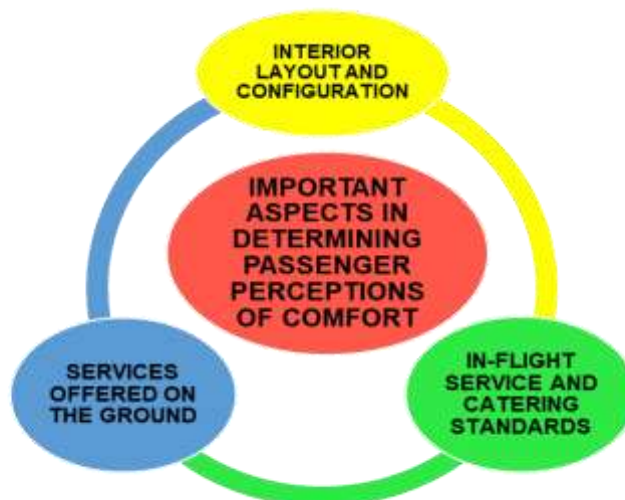


Figure 3: Aspects of Airline Product Determining Perception of Comfort.
Data Source: (Doganis, 2010)

Since the in-flight features are one of the most powerful tools that airlines have to differentiate themselves, the in-flight service features are heavily emphasised in airline advertising and marketing campaigns, as it is the feature of the overall airline product which customers associate with the airline (Camilleri, 2018), and it is also capable of building the airline's image in the consumers mindset.

Convenience features are related to the availability of seats when requested by customers as well as their ability to make changes or cancellations of reservations. In relation to convenience features, Doganis (2010) highlights the importance of the "accessibility to airline reservation and ticketing services by customers and the quality of such services" (p.236).

When it comes to airline's image product features, these are associated with the image or the concept that an airline wants to create in both its passengers and in the consumers mindset at large. Doganis (2010) describes different ways in which airlines can project their image through, such as its advertising and promotion, the airline's airport lounges, the quality of service provided by the staff both in the air and on the ground and so on. Then, in relation to that product feature, employees of the airlines play an essential role in transmitting the airline's brand image to customers.

6.2 Managerial Implications for Airline Product Planning.

Given the high degree of competition in which airlines are framed, the service aspect of the airline product becomes more important. Then, airlines have to offer a good product and service standards which are delivered in a consistent way in all aspects of its operation, therefore marketing and product planning must be all-embracing (Doganis, 2010).

Marketing strategies have an impact on operating costs, and these impacts are broadly considered by airlines. An example of this was SAS Airlines, who in the late 80's decided to operate its intra-European flights with smaller aircrafts than it was used to do before. Operating these flights with smaller aircrafts resulted in higher unit operating costs for SAS, however, by concentrating on schedule-based product features, SAS was able to attract a significant share of business traffic which was prepared to pay the higher fares that this strategy required (Doganis, 2010). SAS made this decision after conducting a survey among their customers and concluded that for their customers, schedule-based features were more important than size of aircraft. Then, based on results, SAS has historically tried to build an understanding of its passengers and develop services based on what SAS believes are the customer's true needs and expectations (Ekdahl, Gustafsson, & Edvardsson, 1999).

In conclusion, for Camilleri (2018) the most successful airlines will be the ones who offer a total quality customer-centric product, and for Shaw (2016), also those who assume that product development is a continuous process which has to be performed by product development departments under the principles of continuous improvement.

7. Price.

Like most goods or services, air travel demand is ultimately related to its price and to the income levels of its potential customers. Then, pricing becomes a crucial element in airline management, and it is also the only source that generates income for the company.

The primary objective of airlines must be to sell the capacity the airline is prepared and able to offer at prices which are able to generate enough demand to ensure an adequate level of profit (Doganis, 2010). In setting prices, understanding of elasticities is crucial for airlines so that they are able to understand how their customers and potentials might react when both increases or decreases in price take place. Hence, knowledge of elasticities of the markets where airlines operate in will help airlines to make more soundly based decisions regarding pricing (Doganis, 2010).

In the past, international fares were agreed upon by the International Air Transport Association (IATA) member airlines. Today, most airlines operate in deregulated and liberalised markets which enable them to be in a position to offer what fares they wish (Camilleri, 2018). This has helped to get to the high levels of competition in which the airline industry is established and with the advent of the Internet and new technologies, price has become an ever-changing feature in reaction to market demand and consumers behaviour.

The Internet has had two major impacts for the airline industry; - it has given the consumer the power to compare fares, schedules, services and so on, therefore, the market control has been transferred from the airlines into consumers and this has helped enhancing market transparency. Also, - airline pricing has become more dynamic, ever-changing in real time, enabling airlines taking action and reaction to competitors price changes or strategies.

Revenue management has become an essential tool for airlines used to increase its revenue and get as much consumer surplus as possible, therefore, airline pricing has become very dynamic and responsive to market demand and consumer behaviour.

According to Narangajavana (2012), there are several factors that influence airlines in the establishment of prices in the short term, among them: - oil prices, which airlines have difficulties in foreseeing its prices due to its volatility, - exchange rates, which are out of control of airlines, and, - the perishability of the service that leads airlines to uncertainty whether the service will be sold or not, assuming the risk that it cannot be stored in case it is not sold.

Therefore, for airlines to be able to set prices in the most convenient and effective way, Doganis (2010) suggests that understanding the relationship between pricing and the different costs is fundamental to effective airline management, and, also, points out that the key to successful revenue generation is market knowledge, effective revenue management and cost awareness. These factors, when properly combined, will drive airlines into implementing correct and fruitful pricing strategies.

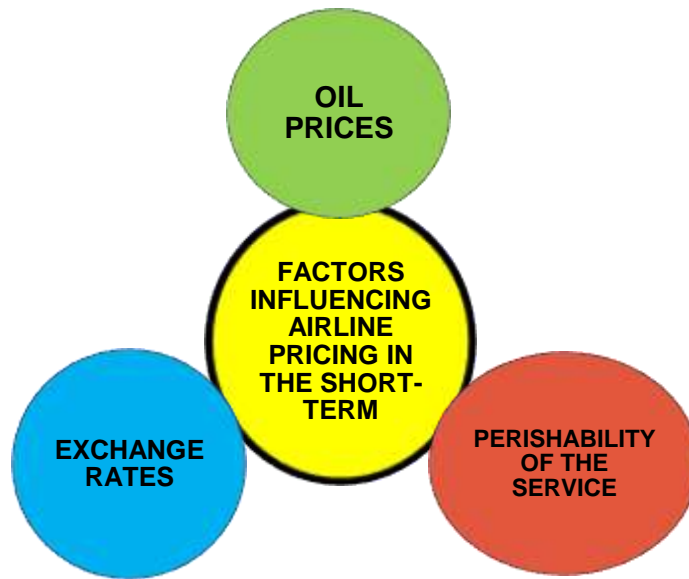


Figure 4: Factors that Influence Airline Pricing in the Short-Term. Data Source: (Narangajavana, 2012)

7.1 Airline Pricing Facts.

Deregulation brought airlines the chance to set new pricing strategies, as a result, the low-cost business model emerged, introducing low prices as the main product feature to attract demand, and has ended up becoming prevalent in the market. A key feature that has boosted low-cost carriers' success has been the use of low and simple fares with the aim of diverting passengers from existing carriers, both full-service airlines and ground transporters, and to generate new demand from consumers that before could not afford traveling by plane (Doganis, 2010).

Some factors have enabled low-cost carriers to set their low pricing strategies, such as the fact that low-cost carriers operate primarily point to point routes, the fact that they tend to have only one cabin class, and some of them only have one type of aircraft for their whole fleet. All these factors have enabled them to cut costs and therefore, being able to simplify prices (Doganis, 2010).

The general procedure of low-cost carriers for setting prices, according to Doganis (2010), is as follows:

The fare of each flight is very responsive to the demand for that particular flight. Initially, the fare of a flight starts being very low well in advance of the departure date. As departure date approaches or as the number of seats at the low initial fare fill up, the single fare available for each flight moves up in a series of steps. It may also move down if a particular flight is not being sold well (p.269).

The success of the low-cost business model and its pricing strategy has made traditional network airlines have appreciated the marketing advantages that a simpler more flexible and dynamic pricing structure offers in the competitive environment where the airline industry operates, hence, traditional network

airlines started implementing these strategies, adopting features of this business model and aligning and adapting them into their strategies (Doganis, 2010).

7.2 Current and Future Implications of Airline Pricing.

This scenario regarding pricing and high competition has made become demand extremely price sensitive. Then, airline consumers are now more price sensitive than ever before and therefore, they are more susceptible to react to monetary incentives such as discounts or special offers (Crespo-Almendros & Del Barrio-García, 2016).

As said before, the liberalization of air transport in the USA first, and later, in other markets, made LCCs a business model of success due to its cost advantages towards traditional full-service carriers or flagship carriers, who had to adopt and implement some of the management practices and policies developed by LCCs to be able to compete with them in especially short-haul routes. Such was the impact of LCCs in the airline industry that several former flag carriers created low-cost subsidiaries to increase their cost competitiveness on short-haul routes by offering point to point services in competition with other LCCs (Fageda, Jiménez, & Perdiguero, 2011). In that sense, as Fageda, Jiménez, & Perdiguero (2011) point out, examples of this strategy are provided by KLM with Transavia, Lufthansa with Germanwings - then Eurowings -, and SAS with Snowflakes.

In Spain, the case of Iberia becomes a characteristic one, as the airline has been holding a dominant position at two of Europe's largest airports, Madrid and Barcelona Airports, Iberia has been able to concentrate its network operations in Madrid and its low-cost operations in Barcelona Airport with its low-cost subsidiary Vueling (Fageda, Jiménez, & Perdiguero, 2011).

Nowadays, this current fact in relation to pricing dependence will become even more dominant in the future, and as Shaw (2016) highlights, the future of the industry is unlikely to see greater stability in airline pricing structures, as the continuation of the well-established deregulation process and growing airline skills in storing, manipulating, interpreting data from their market knowledge and consumer behaviour, and communicating fares data are likely to lead to instability in the market in the upcoming years.

8. Place – Distribution.

Regarding the 4P's of marketing, place, for airlines, is used for describing the distribution channels that airlines make use of to sell their product. In all areas of marketing, links must be made between the customer and the product, these links are known as the distribution channels (Shaw, 2016).

In any airline's marketing strategy, important decisions need to be made to deploy an strategy on how the airline product is going to be distributed, and in particular, to establish to what extent will the airline make use of both their own selling resources and independent agents such as tour operators, travel

agencies, OTA's and so on, assuming the costs that making use of these channels represent for the airline (Doganis, 2010).

For many years, the tourism businesses may have distributed their products and services through intermediaries. Prior to the emergence of digital media, the leisure and business travellers did not have any other option than to make their reservations and ticketing through travel agents or sales offices in which global distribution systems (GDS's), which arose as a consequence of the development of CRS (Computer Reservation Systems), had a dominant position in the travel industry playing the essential role of connecting supply and demand (Camilleri, 2018). Airlines used to hold sales offices in city centres and airports. Their distribution network consisted of tour operators and travel agents who were entrusted with the distribution of tourism product. These intermediaries were usually paid by sales commissions in return for their services (Camilleri, 2018).

CRS are systems that were started to be used in the 50's by airlines and hospitality businesses (Camilleri, 2018). As they evolved, fostered by the support and investment from major airlines, CRS increased its functionality and became an essential tool for airlines for distributing their product, to the extent that, however, latest advances in technology have brought significant changes in this regard for the airline industry, CRS are still nowadays playing an important role in airline distribution being effective distributive forces for airlines. Still in use, most airlines, which make use of intermediaries in their distribution strategies, 'have outsourced their CRSs to Global Distribution Systems (GDSs) companies, which have enabled consumer access through the Internet gateways' (Camilleri, 2018) (p.108).

8.1 Role of The Internet Regarding Place – Distribution.

For airlines wishing to distribute their services in the most direct and straightforward manner, the Internet has allowed airlines bypassing the GDS and avoiding its high fees or commissions, enabling airlines to distribute its own product directly through their websites and having direct contact with end-consumers (Camilleri, 2018).

Towards the new changes that the Internet brought into the sector, Narangajavana (2012) states that airlines reacted rapidly and became pioneers in adopting new IT tools and in transforming and adapting the business according to the changes. In that sense, airlines experienced significant changes in its ticket distribution practices that have enabled them to reduce costs regarding commissions to external intermediaries and reach a high level of direct contact with the customer, allowing them to improve the customer experience. It becomes, then, obvious that these latest technological advances have enabled airlines to manage their distribution channels in a more efficient and economical way as airlines, according to Camilleri (2018), have improved their ability to monitor their performance across channels which, at the same time, have enabled them to be able to quickly adjust offers and optimise their communications and transactions.

As a result, direct selling has become more and more significant as traditional airlines have supplemented their former direct selling through physical sales offices and call centres with an increasing emphasis on web-based business. Also, new airlines have appeared which have largely or totally ignored the travel agency industry, as it is the case of some low-cost carriers (Shaw, 2016). Nowadays, such is the relevance that the digital media and the Internet have reached that, as Crespo-Almendros & Del Barrio-García (2016) state: "The use of electronic ticketing has grown rapidly. According to the Airline Reporting Corporation (ARC), virtually 99% of all airline tickets used in the United States in 2013 were obtained electronically" (p.1).

8.2 Current and Future Managerial Implications Regarding Airline Distribution.

The use of the Internet has made evolve airline distribution from its former passive, rigid and centric state manner into a more flexible, dynamic, and passenger-centric manner of distribution (Camilleri, 2018). Since airline tickets have been found to be one of the most purchased tourism services on the Internet (Crespo-Almendros & Del Barrio-García, 2016), airline management need to bear in mind the importance of such a powerful tool to control, maintain and strengthen its direct distribution. In that sense, as Shaw (2016) points out: "successful airlines acknowledge that effective control of distribution channels is one of the most important drivers of profitability in the airline industry, and act to establish and sustain such control " (p.256).

The rise of LCC is of special relevance to the history of airline distribution, as the mainly internet-only distribution approach they implement has transformed the distribution landscape (Bingemer, 2018). The fact that many LCC with large passenger volumes are not present in the GDS challenges the GDSs as the main force of airline distribution.

In that sense, in Europe, Ryanair and easyJet are the leading LCC and base their distribution through direct selling up to the extent that, for instance, Ryanair announced in 2017 that they were no longer taking part in any partnership with GDSs. It is usual nowadays to find campaigns carried out by Ryanair encouraging their customers and potentials to only make use of their website to make their reservations and highlighting some of the benefits that passengers get when making use of this direct channel. This separation of GDSs and LCCs distribution practices has given path to internet-based metasearchers aggregating classical GDS content and low-cost fares into a coherent search display (Bingemer, 2018).

Upcoming years will see some of the greatest changes in the area of distribution, as it is expected that over the next years there will be a continuous fall in the proportion of tickets sold by travel agents (Shaw, 2016). Also, a matter that will require further investigation is the entry of powerful search engines, such as Google, into travel retailing as it is expected to be a challenging issue for the industry in the next years. In the IATA (2016) report on the future of airline distribution, Google is presented as a powerful external technology firm that has the cash, the talent and the resources to participate and possibly disrupt airline distribution, and as the image below shows, already by 2016, 85% of airline

distribution and commercial executives saw and were aware of the role that Google could play regarding airline distribution in the following years.

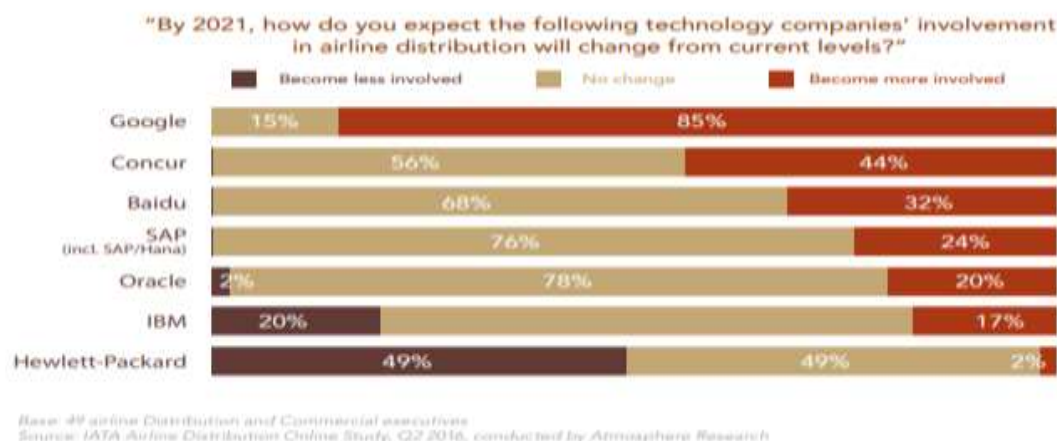


Image 1: Google's Expected Role in Airline Distribution by 2021
Source: IATA 2016 Report on The Future of Airline Distribution 2016-2021

9. Promotion.

The aspects addressed so far, product, price, and place-distribution, are an approach on how airlines might deal with them and some important considerations which airlines should undertake to conduct correct analyses of their marketing environment, establish fruitful strategies regarding product, brand image, pricing, and distribution policies. However, and above all, to be successful, airlines must convince and persuade customers and potentials to purchase their product rather than the one from their competitors, and here is where promotion comes in.

Airlines make use of different tools of the promotion mix, these tools are aimed at fostering an increase in awareness of the airline and its services, to inform customers and potentials about features and benefits and to drive them to make a purchase (Camilleri, 2018). The communications mix regarding airlines is a wide one, and airlines find different channels to convey their messages to the public. Sponsorships in different kind of events, database marketing, media relations, various forms of advertising, including through the Internet and, personal selling through investment in a field sales team, among others are some of the choices that airlines have for investing money to promote its brand and services (Shaw, 2016). However, regardless the mean or the strategy followed by an airline, the communication tools should above all focus on the advantages of the services as well as the explicit needs that are being met by the offer (Kotler & Pfoertsch, 2006).

As seen, there are several ways in which airlines promote its service and its brand values, advertising, though, is the most common and used to do so. Given the importance of advertising to project a good image to consumers and to society, Shaw (2016) considers that "advertising may be able to play a subtle but useful role in positioning an airline as a good corporate citizen" (p.312).

Also, there are many features that an airline might emphasise on their advertisements and marketing campaigns, in any way, the common goal of any promotional action is to be persuasive, showing a true understanding of the customer's needs, and demonstrating the ways in which the airline can successfully meet these needs (Shaw, 2016). In addition, for a given promotional action to be carried out by an airline, an analysis of whether this action, ad, or campaign, is compatible with the airline's long-term brand values or not becomes necessary to not send confusing messages to consumers and preserve the integrity of the brand. Hence, communications from airlines must be consistent with its values and framed under the guidelines of the objectives of the corporation.

To be conceived as something else than a simple commodity or a common good among others, some airlines focus their efforts on providing product and service improvements together with effective advertising and promotion, so the services provided by the airline are conceived as a brand in the consumers mindset (Doganis, 2010). In that sense and to reach that purpose, airline employees, as prime representatives of the company when performing the service, play an essential role in conveying the brand image to customers, as any other company in the service industry.

9.1 Managerial Implications Regarding Promotion for Airlines.

Airlines need to target their communications to reach their customers and potentials according to the segment they are aiming at persuading, in that sense, when an airline needs to launch new promotions, marketing campaigns, advertisements, special offers or communications such as new announcements, launching of new services and so on, an analysis to find both the optimal timing and the correct mean of communication is needed so that the message reaches the highest number of viewers and the maximum awareness among the segment that the airline is aiming at. To do so, when developing their advertising strategies, airlines need to bear in mind two major elements: creating advertising messages and selecting the proper advertising media (Kotler, Armstrong, Harris, & Piercy, 2013).

An example of the above-mentioned, is, for instance, when an airline seeks to reach the business air traveller, here Shaw (2016) suggests that there are a well-established number of possible media choices, including business newspapers, both physical and online, commercial breaks in news programmes and some sports events that may bring a suitable audience profile for the airline. On the contrary, when an airline is seeking to send communications to the leisure travel segment, other types of newspapers are useful, such as weekend newspapers, also TV commercials, online promotions, and on-the-street advertising posters, as all of them represent a great chance to promote certain destinations or promotions to be presented in an eye-catching way.

Also, depending on the type of communication that an airline needs to send to the audience involved, a study on which method would be the proper one for achieving the objectives proposed by the airline is needed. An example of this is

when an airline launches an strategic long-term brand-building campaign, here, Shaw (2016) points out that these strategic communications show more success and awareness if the communication is to be shown through a TV commercial, as these kind of communications allow messages to be presented in such a way that print media cannot fulfil. Nevertheless, when the aim is to promote a special discount or offer for a certain date or destination, messages need to be quickly produced and published out, hence, newspapers advertisements and online communications seem to be the most effective ways of communicating messages and promotions quickly as they can usually be placed at short notice.

9.1.1 Role of the Internet in Airline Promotion.

The advent of the Internet changed enormously airline distribution and promotion. The changes brought by the Internet enabled airlines to start conducting different promotion strategies when it comes communication of prices or fares, special offers or discounts, brand-building campaigns, promotion of new services such as new routes, new in-flight services and so on. In essence, the Internet has lead airlines reach a higher number of viewers, expand its brand into new markets, and therefore, to raise higher awareness of the presence of an airline among consumers in a market.

Nowadays, given the importance of the Internet, airlines must show great online content through their website and wherever they are engaging with interactive users (Camilleri, 2018). Social media has become one of the main tools for airlines to promote its brand and its product and to communicate with customers and potentials and therefore, to increase popularity. It is also suitable for marketing both types of airlines, low-cost and full-service airlines, because of their high level of personalization of communication (Zelenka & Hruska, 2018). The use of social media help airlines to getting to know preferences, behaviour, and segment of potential customers, personalize communications about services, and strengthening its image and brand loyalty among others (Zelenka & Hruska, 2018). All these advantages that social media bring to airlines, added to the fact that passenger use of airline social media is expected to increase continuously (Seo & Park, 2018), and as such, the proportion and importance of social media in the marketing activities within the airline industry, make of it a powerful tool for airlines to establish contact with its audience and the use of social media is expected to be a long-lasting practice in the promotion strategies carried out by airlines.

In addition, according to the study conducted by Seo & Park (2018) social media marketing activities have positive effects on brand awareness and brand image and significantly contribute to airline brand equity. Because of that, airlines, in their social media marketing strategies, should induce customers to use social media more actively by developing more interesting and aggressive social media marketing activities.

When it comes to online promotion strategies, Crespo-Almendros & Del Barrio-García (2016) point out that identifying the most suitable promotional strategy for

airlines will make them improve the efficiency of their communications and achieve increased profits. There are some factors that need to be considered when designing an online promotional strategy such as the level of Internet experience of the users, this factor is of the utmost interest because it will determine which kind of incentive must be given to users when a campaign aimed at generating online sales is carried out. Users with a broader experience on the Internet seem to be less sensitive to monetary incentives than users with less experience on the Internet, therefore, airlines need to identify, bear in mind relevant facts as this one, and properly target the customers they are aiming at in every campaign they carry out.

Also, Crespo-Almendros & Del Barrio-García (2016) suggest that the recommended online promotional strategy for airlines when entering new markets or launching new routes is to start by launching monetary sales promotions as these are found to achieve a higher level of purchase intention than non-monetary initiatives in those cases.

9.2 Conducted Survey Model Introduction and Objectives.

In this study, a survey has been conducted to analyse the key determinant factors when choosing an airline, and once these factors are known, to analyse if are also these factors the ones emphasised by airlines in their promotional campaigns or, if on the contrary, other features are the ones highlighted in their promotions. Another objective of the survey was to ascertain both the relevance of promotional campaigns for consumers and to what extent are promotional campaigns a key determinant for the purchase of a flight ticket.

Airlines need to ascertain and be updated with the latest trends which may become determinant for customers and potentials when choosing an airline to travel, therefore, making an analysis of promotional campaigns carried out by airlines is of interest to determine whether airlines bear in mind these factors and align them into their marketing campaigns or they highlight other features as their main value proposition or strengths in their promotions.

9.2.1 Boundaries and Scope of the Survey Conducted.

Given the small scope and the nature of the survey conducted, as it has not been an exhaustive survey designed and analysed by professionals of the field, it is necessary to warn that the results obtained cannot be extrapolated into clear evidence and would require of further investigation and wider scope to reach more definitive conclusions for airlines when determining key purchasing decision making factors and content to emphasise in their promotional campaigns. However, the survey might serve as a pre-test as it contains useful and interesting information from consumers about important factors considered when purchasing a flight ticket and the importance given to promotional campaigns carried out by airlines.

9.2.2 Survey Methodology.

The survey conducted combined different type of questions. First, to be able to build the profile of the respondents, first six questions were channelled towards sociodemographic characteristics, behavioural and travel patterns. In those questions people surveyed had to specify basic sociodemographic features such as their gender, age, nationality. They had also to specify the number of times they were used to travel per year, the main reason for their travels and, also, whether flight tickets were paid by themselves or not.

The main section of the survey was the following one, which was aimed at ascertaining the key determinant factors when choosing an airline. Using a *Likert Scale* from 1 to 5, where - 1 was *no relevance at all*, 2 *could consider it*, 3 *I consider it*, 4 *it is important*, and 5 *it is the most important* - respondents had to rate the importance they give to the following features when purchasing a flight ticket:

1. Low ticket price.
2. Quality of service, customer service, different services, and on-board comfort (seat selection, meals, wi-fi, on-board entertainment, etc)
3. The possibility to accumulate miles and/or points to their frequent flyer programmes.
4. Schedule availability and different travel options.
5. Cancellation and refund policies.
6. Former positive or negative personal experiences with the airline.
7. Hand luggage and checked-in luggage conditions and policies.
8. Promotions and advertising campaigns seen in the media and the Internet.
9. Existence and availability of direct flights or connection flights.
10. Safety record of the airline.

The following section of the survey was focused on promotional campaigns carried out by airlines and the aim of it was to determine the relevance and the influence that promotional campaigns have towards purchasing a flight ticket. Respondents had to specify through a dichotomous question whether they remembered any specific advertising campaign from any specific airline, and if it was the case, they were asked to briefly describe through an open answer question the features that were highlighted in that particular ad. Next question of this section was relevant to ascertain, again through a dichotomous question, whether that specific campaign made respondents buy a flight ticket for travelling with that specific airline or not. The following question was aimed to determine the extent in which that specific campaign influenced their purchase decision, through a Likert Scale from 1 to 10, - where 1 was *it had no relevance at all* and 10 was *it was the reason why I bought the flight ticket* - respondents had to rate the importance the specific campaign had with regards to their purchasing decision. Finally, the last question of the survey was aimed to find out the airlines that respondents travel the most with, and people surveyed had to write down through an open answer question the airlines they normally travel with.

9.3 Survey Analysis of Results and Promotional Campaigns.

The survey was available to be answered for one week, in that period, a total of 270 answers were received. Regarding sociodemographic characteristics, 62.6% of respondents were women, whereas 37.4% men. The most repeated age segment was the one between 18 and 25 years old (57,8% of respondents), followed by the age segment between 26 and 35 years old (30.4% of respondents), in third position was found the age segment between 36 and 45 years old (6.7%), in fourth position the age segment between 46 and 60 years old was found (3.7%), and finally the age segment of more than 60 years old (1.5%). The most repeated nationality among respondents was the Spanish with 250 out of 270 respondents, followed by German, Bulgarian, British, French, Italian and Colombian.

In relation to travel and behavioural patterns, 53.7% of respondents stated that they were used to travel between once and twice a year, followed by 29.6% of respondents who travelled between three and five times a year. 16% of respondents stated that they travelled more than five times a year. The main reason for travel was holiday and leisure purposes (70%), followed by visiting friends, relatives, couple - the so-called in the industry VFR – (20.5%), and followed by the combination of both working and leisure purposes (8.2%), in the last position the travel for work purpose reason was found (1.3%). Regarding the question of who paid for the flight tickets, 86.7% of respondents stated that flight tickets were paid by themselves, whereas 13.3% stated that other people paid for them.

Regarding the main section of the survey, where key determinant factors were aimed to be found out, low ticket price resulted of great relevance among respondents when purchasing a flight ticket with more 71% of people surveyed who stated that this feature is between the most important feature for them and always important for them when purchasing a flight ticket. 20% of respondents stated that they take low ticket price into consideration when deciding the purchasing, therefore, it can be assumed that low ticket price becomes the key determinant factor among respondents when purchasing a flight ticket, as more than 90% of the total give great relevance to it.

In that sense, given the great relevance that the feature low ticket price has among respondents and the fact that the low-cost carrier Ryanair was, with difference, the most flown airline among people surveyed, promotional campaigns outlining price are popular in that airline. Ryanair follows a promotional strategy based on launching aggressive promotional campaigns, to be displayed through different means such as TV, the Internet, and social media, where the feature of low price is highly emphasised to attract a wide number of consumers. The following images show different promotional campaigns from Ryanair where low price is their main argument to persuade consumers.



Image 2: Ryanair Promotional Campaign Flights from the Balearic Islands Source: www.ryanair.com/es

The image above displays an online promotional campaign from Ryanair where flights to 23 new destinations departing from the Balearic Islands are advertised. Highlighting low prices to attract consumers and calling to action with a *book now* yellow button, this kind of promotions is one of the most recurrent and most used by Ryanair in their advertisements found in the online environment.



Image 3: Ryanair's Tweet Low Price Brexit Related Campaign Source: www.a21.com.mx

Another trend that Ryanair follows regarding promotion strategy is the fact that they await and take profit of some controversial issues in societies such as Brexit in the United Kingdom to send their vision and insights about the issue and to launch specific low-price aggressive campaigns related to the concerning issue that become viral. This phenomena of viral marketing becomes very useful for the airline as their brand is widely spread at short notice, reaching high degrees of engagement among Internet users and being present due to the high degree of word of mouth that these campaigns cause in societies. This trend is consistent with Seo & Park (2018) who believe that, by developing more interesting and aggressive social media marketing activities, airlines are more likely to ensure continuous advertisement activity by consumers, and therefore, contribute to reach their income objectives.



Image 4. Ryanair Low-Price Brexit Related Campaign Source: www.a21.com.mx

In the case of the feature of quality of service, customer service, on-board comfort, different services including seat selection, meals, wi-fi, on-board entertainment and so on, 50% of respondents stated it was important for them and 35% stated that they could take it into consideration. Therefore, adding up both segments, a total of 85% of people surveyed give relevance to this feature when purchasing a flight ticket, which becomes a matter of interest for airlines when launching promotional campaigns outlining quality of service as the prime attribute of their product. In that sense, several airlines follow the strategy of basing their advertisements and promotional campaigns on providing an image of excellence and great quality of service.

An example of this is Emirates, who bases their advertising and marketing campaigns emphasising the quality of their service, their in-flight entertainment, by which they have been widely awarded for, and the experience of flying with the airline. The following images show a marketing campaign carried out by Emirates launched in 2018 which main slogan was *Fly Better*. Through this global advertising campaign, framed under their promotional strategy, the airline pursued their objective widely stated in their corporate philosophy of making people enjoy a better flying experience.



Image 5: Emirates Fly Better Advertising Campaign (I)

Source: www.arabianbusiness.com



Image 6: Emirates Fly Better Advertising Campaign (II)

Source: www.thedesignair.net



Image 7: Emirates Fly Better Advertising Campaign (III)

Source: www.thedesignair.net

Hence, Emirates promotional strategy is in line with Camilleri (2018), who points out that the in-flight service is heavily emphasised in airline advertising and marketing campaigns as it is the feature of the overall airline product which customers associate with the airline. For this reason, Emirates understands that quality of service and attentiveness of cabin staff may create a certain image for an airline which may be important in marketing or branding terms, and as Doganis (2010) highlights, airlines that are innovative in relation to quality of service can enjoy a competitive advantage until their new product is copied by other competitors.

Following on the key determinant factors when choosing an airline, the question related to frequent flyer programmes features, was shown to be of small relevance among respondents meaning that surveyed people did not give relevance to the fact of accumulating points and/or miles to a given frequent flyer programme in which they hold a membership when purchasing a flight ticket, as

54% of respondents stated that it had no relevance at all. This fact is in line with the main conclusion that arises from the survey in that the majority of respondents, young people aged between 18 and 35, who travel for leisure purposes, are the most price sensitive segment of the market and therefore, are not chained to any given airline when flying but give special relevance to low ticket price.

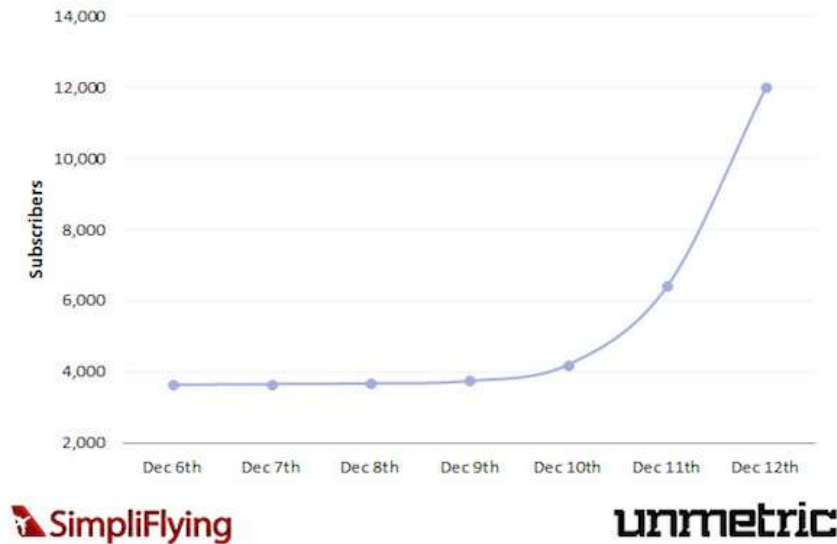
Next features, schedule availability and different travel options, and cancellation and refund policies ended up being both an important factor for respondents. 85% of people surveyed stated that schedule availability was among their preferences when choosing an airline to fly with, and 70% of survey participants took cancellation and refund policies into important consideration regarding the choice of an airline.

The next feature that was asked to be rated by respondents was the importance given to former positive or negative personal experiences with the airline. The feelings or the way a customer experiences a service clearly impacts on how the customer will feel later about the service provider and how the customer will behave in the future towards the company (Laming & Mason, 2014). Assuming that, it seems customer experience might become, therefore, a key determinant factor when choosing an airline, and, respondents, actually, have given much relevance to this feature in the survey.

More than 80% of respondents stated that it is an important factor which is always taken into consideration and might have a definitive role towards the choice of an airline when purchasing a flight ticket. Moreover, there is a marketing campaign carried out in 2013 by Canadian airline Westjet that has been repeatedly commented on in the open answer question related to advertisements and promotional campaigns. Comments such as "*Westjet Christmas Ad where the airline gave presents to their passengers*" and similar ones were received several times, hence, although none of the respondents stated they fly Westjet usually, they strongly remember this campaign. Consequently, this could be a proof of how important customer experience might become towards the predisposition for a future choice of an airline.

This campaign was called *Christmas Miracle* and it was aimed at doing something remarkable, sentimental, and interactive for both its customers and employees. Westjet delighted their unsuspecting passengers with a real-time surprise that delivered personalized gifts to their passengers. The airline recorded the experience and the reactions from passengers towards these unexpected gifts, then, they made a video showing both the behind-the-scenes preparation of this surprise and the moment when the gifts were finally delivered to their passengers together with the emotional reactions that this surprise caused to passengers. The video was posted in YouTube: <https://www.youtube.com/watch?v=zIElvi2MuEk&t=46s> and in a few days the ad became the most viral Canadian ad of the year and among the top five globally. This brand-focused campaign became one of the most-viewed and shared viral ads of 2013 in the world, and increased WestJet's sales by 86% compared to the same period last year and contributed to increase brand awareness and loyalty

from customers (Evans & Plata, 2014). Also, thanks to this campaign, Westjet experienced an increase in subscribers on all their social media profiles and, as an example, their YouTube account experienced a 320% growth in subscribers in just three days after having posted the video (Bysani, 2013).



Graphic 1: Post-campaign Westjet's growth in YouTube subscribers Source: www.simpliflying.com

This campaign also embraces other important value for airlines promotion and brand image, which is the one of caring, through which according to Shaw (2016), airlines should conduct and approach to activities associated with charities or other good causes. In line with this value, other campaigns carried out by other airlines are also found, such as British Airways' *Visit Mum* campaign in 2013 through which the airline takes the connection part to a very personal level by providing transportation to India for an Indian guy living in the United States for visiting his mum after a long time without having seen them each other (video link: <https://www.youtube.com/watch?v=WPCfJuk1t8s>).

These campaigns have as a prime objective to create good memories to passengers and consumers' mindset towards the airline and help to figure out how relevant customer experience might become when purchasing a flight ticket even having not experimented these experiences personally.

Next feature asked to be rated for its relevance were the conditions and policies of both the hand luggage and checked-in luggage. For more than 65% of respondents, this feature was between the most important thing and an important thing to consider when purchasing a flight ticket, therefore, it becomes one of the key determinant factors for the sample when purchasing a ticket. Airlines know the importance of this feature for passengers and, in relation to it, there are airlines that highlight in their promotional actions the fact that a hand luggage, despite being normally a basic-necessary belonging to travel with, or a checked-in luggage is included in the fare that the customers are booking for.

A clear example of this is Jet2.com who markedly emphasises the fact that all their holiday packages sold through their tour operator, Jet2Holidays, include a 22kg baggage allowance per passenger. The following image shows a 25meters banner displayed at the entrance of Palma de Mallorca Airport which is widely seen by a great number of people every day upon arrival at the airport which helps the airline to gain visibility and brand awareness.



Image 8: Jet2.com & Jet2Holidays Palma de Mallorca Airport Promotional Banner Source: Self taken picture.

The results of the next feature that was asked to be rated for its relevance, promotions and advertising campaigns seen in the media and on the Internet, are strongly linked to the conclusion that arises from the survey. Only 20% of respondents stated that promotions and ads seen are in between the most important thing and an important thing when making a purchasing decision. This fact supports the conclusion that respondents of the survey are strongly price sensitive, and for them, promotional actions, ads, and campaigns are not a key driver of their purchasing decisions. In fact, the results of a further question asking whether people surveyed remembered any specific advertising campaign from any specific airline or not, obtained similar results as only 22% of respondents said they remembered some specific campaigns. However, they still remember some of them and could take them into consideration for future purchasing decisions, as seen with viral Westjet's case in the question related to customer experience.

Another fact that supports the above-mentioned conclusion is that, in a further question also related to promotions and campaigns, almost 88% of respondents who stated that they remembered a specific campaign from an airline, also stated that this campaign did not make them buy a flight ticket to travel with that airline.

Existence and availability of direct or connection flights was the next feature to be asked for its relevance. Respondents stated that this feature is of crucial importance when choosing an airline as more than 70% of them have it between

their top priorities when making a purchasing decision. Only 4% of respondents stated that this is an unimportant factor towards their decision.

In that sense, an airline that strongly highlights in their advertisements and promotional campaigns the wide range of destinations they fly to is Turkish Airlines. Due to the strategic location of their main hub and headquarters, in Istanbul, Turkish Airlines reaches to provide a high degree of connectivity worldwide, serving as a strategic gateway between east and west. Turkish Airlines launched a promotional campaign called *Widen Your World* that was also repeatedly commented by respondents in the open answer question related to promotional campaigns. For that campaign, the airline followed a strategy of using celebrities endorsement as marketing communication by creating a video in collaboration with some celebrities and famous sportsmen, such as Leo Messi and Kobe Bryant among others, where the wide range of destinations flown by the airline was firmly highlighted (video link: https://www.youtube.com/watch?v=NDR_tkc4OXc).



Image 9: Leo Messi & Kobe Bryant Turkish Airlines Widen Your World Campaign
Source: www.wavelengthmarketing.co.uk

The last feature asked to be rated for its relevance was the safety record of the airline. The results obtained in this question are in line with Doganis (2010), who points out that safety is a relatively unimportant consideration in North America and Europe, however, it is one of the main key factors in airline choice in Africa, the Middle East, Asia, and the Pacific. As high standards and procedures regarding safety tend to be taken for granted by consumers, leading to confidence and trust towards known airlines, answers to this question varied and ended up being a matter of different relevance for respondents towards their purchasing decisions, nevertheless, it was an issue that, on average, had relevance for respondents purchasing decisions' as only 13% declared that they give no relevance to it when choosing for an airline to fly with. In that sense, as a recommendation, Doganis (2010) suggests that airline marketing directors must take these variations between markets regarding the importance given to safety

into consideration when planning their advertising campaigns in different parts of the world.

In the following question, if respondents stated they remembered a specific promotion in a former question, they were asked to describe what the promotion was about, and the features highlighted in the ad. Some comments have been already introduced as they had led to describe some above-mentioned promotional campaigns. The most repeated and relevant comments were related to low price promotional campaigns carried out by low-cost airlines and some others were related to famous campaigns due to the impact that had on the Internet and in the media. Some of the comments received are as follows: *-Free luggage of 23kg allowance-, -Westjet Christmas as where the airline gave presents to passengers-, -Ryanair offering cheap flights. 20€/flight in Europe- , -Ryanair low prices-, -Ryanair flights for 5€-, -Flights to European capitals for 10€-, -Turkish Airlines with Messi and Kobe Bryant-, -Lufthansa transmits luxury and confidence-, -Jet2.com Friendly low fares- , -Qatar Airlines promotional campaign to offer 4 and 5 star hotels at prices of 20€/night if you stayed in Qatar for up to 4 nights-, -Iberia advertising campaign promoting their frequent flyer programme-, -Iberia launches advertisements every year with a cheap price to travel to places like United States, Latin America, Asia..-, -Vueling where direct flights are offered at low prices through very friendly flight hostesses...-*

As we can see, most of the comments are channelled towards low-cost promotional campaigns which also support the conclusion reached in the survey, in that respondents are highly price sensitive and therefore, they do take low price as their top priority for their purchasing decisions. Another fact that helps support this conclusion is that, in the last question of the survey, where respondents were asked to specify the airlines they fly the most with, low-cost airlines were the most flown airlines by respondents followed by other airlines that normally tighten their prices in order to compete with low-cost airlines in domestic routes. The most flown airlines by respondents were Ryanair with 133 replies out of 270, Air Europa 112 out of 270, Vueling 109 out of 270, Iberia and Iberia Express 94 out of 270, followed by easyJet, Lufthansa and Norwegian.

10. Conclusion.

No airline could succeed without promoting their services, despite the means they carry out their promotions through, all airlines follow the common goal or intention of gaining visibility and brand awareness among consumers through their promotional campaigns. Trends towards advertising campaigns in the airline industry have been changing as time has passed by and, according to Shaw (2016), the role of advertising today is a substantially differing one compared with a few years ago. The role played by the Internet regarding airline promotion is ever-increasing in relevance and airlines focus their efforts in maintaining a strong presence in the online environment which enables them to be throughout present in the consumer's mindset. Here, brand-building and brand-maintenance campaigns become crucial, and airlines incorporate them in their marketing communication strategies. Social media platforms such as YouTube, Facebook, Instagram, Twitter and so on represent nowadays a great chance for airlines to

communicate the uniqueness of their brands (Martin & Todorov, 2010) and, also, serve as a tool to enhance customized content to be shown to specific target audiences that might foster customer loyalty towards an airline. In that sense, airlines do know the potential of these tools and work energetically to be able to take the maximum advantage of them in their favour.

The conclusion arising from the survey, considering its boundaries, limitations and small scope, is in line with Crespo-Almendros & Del Barrio-García (2016) and IATA (2016) in that consumers, and most of all, the youngest market segment, are now more price sensitive than ever, and the sample analysed in the survey is not an exception. Indeed, the results obtained indicate the price sensitiveness and identify the common characteristics that surround the sample analysed. According to sociodemographic characteristics of respondents, the conclusion that is reached is that young people, aged between 18 and 35 years old, normally travel for holiday purposes with low-cost carriers and are extremely price sensitive. For that segment, promotional campaigns do not become a key determinant factor driving their purchasing decisions, as it is low price the key driver of their choice, however, they do remember them and maintain them in their mindset to the extent that they may become an important factor for a possible future purchasing decision. Despite these results not being definitive due to the small scope of this study and the boundaries and limitations associated to it, and therefore, not being possible to extrapolate them into real advice for airlines, these results might serve as a pre-test as it contains useful information and insights that, in application of further research and investigation into the matter, could be of important relevance for the airlines' interests.

It has been seen also that the key determinant factors driving consumers purchasing decisions are also present and outlined in the content of the promotional campaigns carried out by airlines that arise from their communication strategies. Marketing and promotional campaigns emphasising key determinant purchasing decision factors for consumers such as low-ticket price, quality of service, in-flight entertainment, on-board comfort, customer experience, caring values and so on, have been identified and are widely common in the airline industry as airlines incorporate them in their promotional and advertising campaigns as a tool for persuading and convincing consumers to make use of their services rather than the ones from their competitors.

The demand for the services provided by airlines is affected by the marketing mix, including the nature of product or service, its distribution, promotional strategies, and its price. Airlines do know the importance of all of them, and in that sense, they implement strategies over each of these features to try to get competitive advantages that allow them to gain track towards their competitors. It is because of these high degrees of competition that airlines find themselves in a fast and ever-changing marketing environment, which according to Shaw (2016), this marketing environment will certainly remain uncertain and difficult, as the established trends towards deregulation and liberalised markets will continue in the future and will lead to even greater competition between airlines. Hence, successful airlines of the future will be the ones which will be able to conduct an ongoing assessment of their marketing environment, those who will be able to

anticipate upcoming changes, those who implement the culture of change in their marketing policies, and also, those who understand that as market evolves, so do the customers, who have different expectations from airlines, here, Avram (2019) suggests airlines to create marketing campaigns based on the behaviours derived from the study of touchpoints interactions between airlines and consumers as it will allow them gaining customer understanding and ability to predict different customers' needs and future motivations for each segment.

All in all, the future for airlines will be exciting, challenging, and fast-moving, and further research will provide insights of how new trends will evolve and how these trends will change one of the most dynamic industries in the world, the airline industry.

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Annex I. Introduction to Airline Marketing.

I. Airline Marketing.

Marketing as a concept is a philosophy for running an entire business (Shaw, 2016) which has as the main objective to know and understand customers so that the right product can be sold at the right price, through the right place and through the most effective promotion. Hence, market research is an essential component and serves as a starting point to receive information from customers, potential customers, and the environment where a company develops its activity. It is the research stage the one that will provide the information required so that a company gets to know which are the features of the right product, price, placement, and promotion.

As Kotler, Armstrong, Harris, & Piercy (2013) suggest, the objective of marketing is two-fold; first, is to attract new customers by promising superior value and keep and grow current customers by delivering them satisfaction, hence satisfying customer needs is listed on top of the priorities of the marketing strategies of any company. Implementing a business model under the principles of consumer orientation becomes nowadays fundamental to success in any industry given the high degree of competition underlying in the liberalised economies. Airlines are not an exception, and in that sense, if airline management is only aimed at selling its production and not also focused on satisfying the needs of its customers and potentials, it is highly likely to disappear. Then, customer needs and wants are extremely important for airlines (Camilleri, 2018) and being aware of what each segment of the market requires will be the key to achieve a successful performance.

Consequently, segmentation plays a key role in all that process as it enables companies to provide the right product to the right consumers, to define its strategies and to manage a business through the most efficient way. A marketing approach, for airlines, when correctly implemented, will result in the right products being offered to well-researched market segments (Shaw, 2016). Doganis (2010) highlights that, for an airline, the more it knows about its current customers or potentials, the easier is to plan and target its services and products to meet the specific needs of each market segment. Understanding the size and characteristics of each market on each route is essential for forecasting demand and in that characteristics, reliable and updated information about elements such as behaviour patterns or socio-economic characteristics of passenger demand will be useful for purposes like advertising, pricing, and product planning among others. Therefore, airlines that fail to conduct an ongoing market research are the ones that will get into difficulties when trying to match supply and demand and subsequently will fail to success.

Such an ever-changing industry as that of the airline industry require that management decisions need to be change orientated, able to anticipate new trends and skilled enough to adapt to new environments. All these features need to be translated into the marketing policies of the airlines, which need to be also dynamic and responsive to ongoing trends (Shaw, 2016).

I.I Airline Marketing Stages.

Airlines follow and go through several stages when it comes to identifying potential actions, designing strategies, building, or redesigning its brand, creating the final product to be delivered and so on. According to Doganis (2010), the first step in airline marketing would be to identify the markets and the market segments that an airline has the potential, the necessary resources and ability to serve in a profitable way. To identify these opportunities, airlines make use of the aforementioned large range of market research, which can take place in different information obtention methods such as quantitative and qualitative methods. In this regard, airlines count with important departments in charge of obtaining and analysing data and information from different sources to make use of this valuable information in the most effective way for the company and take necessary action to preserve the airline's interests.

The next step outlined by Doganis (2010), is to decide, making use, and according to the preceding market analysis, the range of different air services that should be offered to the market and the service features to be provided by the airline both in the air and on the ground, that is at the airports where an airline operates. Kotler, Armstrong, Harris, & Piercy (2013) define this as fulfilling market offerings, which is in essence, the combination of products, services, information, or experiences offered to a market to satisfy needs or wants.

Once former steps have been successfully accomplished, the third stage is to plan and organise the distribution and selling of the products based on a marketing plan (Doganis, 2010). This stage involves setting up and operating sales and distribution channels both airlines owned, such as call centres, the airline's webpage and the less and less existing physical sales offices, and non-airline owned sales channels such as online travel agencies (OTA's) and tour operators (TTOO). Also, and inside this stage, to attract potential customers, retain the current ones and deploy the airline's brand image, marketing plans of airlines will also include a fully detailed programme of advertising and promotion activities.

All in all, these stages must be all embracing between them (Doganis, 2010) and without leaving out the fact that marketing is concerned with reviewing and monitoring both the degree to which the airline has been able consistently to meet the service standards and product features planned, and customers' responses to them. This continuous monitoring and control through periodical sales figures, customer surveys, online sales, reviews, complaints, and different key performance indicators (KPI's) set up by the airlines enable airlines to take short-term corrective actions and, also, to make longer-term changes in their service and product features for the sake of ensuring the preservation of the airline and defending its interests in the markets they operate.

I.II Airline Marketing Environment and Deregulation of 1978.

Managing an airline is influenced by many different factors, factors that are all of them different in size, in relevance and in affectation for the company. Airlines

must be aware of the ongoing factors that affects them and must act accordingly to what these issues might cause to them.

There are several factors which airlines do need to be conscious about, those factors can be categorized as follows (Tutorials Point, 2017):

- Political factors, which are associated to fear of terrorism, political instability in the countries they operate, deregulation of government policies etc.
- Economic factors which are related to economic growth or instability in the countries they operate, different economic conjunctures found in the different markets they are present etc.
- Social factors, which are related to demographic data of its customers and potentials, arising changes in behaviour patterns, social instability in the home country and in the countries they operate.
- Technological factors that could lead to advances and innovations enabling airlines to improve its performance, other technological factors than bring innovations and advances to societies in the way of new devices, new internet applications and so on.

As briefly introduced, there is a wide range of factors that cause effects on airlines, however, in this section, the focus will be set on the high degree of competition that surround the airline industry, how this competition arrived due to deregulation of 1978 and finally, different factors that might cause effect on the airlines' image.

I.II.I High Competition in the Airline Industry.

The aforementioned factors cause effects on all airlines in the world but what makes this industry special is the high degree of competition that is present in the sector. According to Abdelhady, Fayed, & Fawzy (2018), the air aviation sector is characterized by intense competition and airlines are permanently doing their best to get better the services they provide to their passengers. Airlines, to not to lose track with their competitors, are always aware of what their competitors do when it comes to new strategies, new service launchings and new trends underlying in the sector. It would not be of a great success if an airline performs its activity in an isolated way without being aware of what happens in the market environment and not reacting to new trends, adapting, and responding to current demands of the market.

Nowadays, given the wide range of airlines operating, the passengers have enormous options to choose the appropriate airline according to their needs. Not all airlines emphasise the same features of its product, as they might want to follow different positioning strategies and have different objectives, however, the common objective of every airline operating in the market, as any other company operating in any industry, is to be as much profitable as possible and to generate as much revenue as possible. As Abdelhady, Fayed, & Fawzy (2018) highlight, to differentiate from competitors and attract and retain customers, air transport

companies are constantly working on the in-flight service improvements and renewal to differentiate themselves from rivals. Examples of these improvements and innovations are the wide range of advertisements that are found where airlines show their renewed airplane cabins with new entertainment devices, new menus created by renowned chefs and so on.

I.II.II Origins of High Competition. Deregulation of 1978.

Consumers in general are used to this high degree of competition and might get benefited from it in the sense that there are more choices to choose from, compare and change according to its preferences, but this wide range of election has not been permanent. Back in time, airlines found themselves under a high regulated market environment where government was in charge of setting fares, routes, policies and regulation to comply with so that the industry could preserve his strength and to protect airlines from high competition. Deregulation took place in the United States in 1978. According to Goetz (2002), the airline industry was the first to be deregulated and since then, the number of people using airline services has more than doubled since 1978, and airline fares are significantly lower on average. Deregulation of 1978 removed U.S Federal Government control over fares, routes and market entry of new airlines and introduced a free market in the airline industry leading to a great increase in the number of flights, an increase of new competitors due to the allowance of the entrance of new airlines into the market, a decrease in fares, which enabled people, who before could not afford it, to now fly and make use of the air services provided by airlines (Jordan, 1989).

Deregulation, therefore, brought significant changes for airline management as since then, airlines started having freedom to restructure their route networks, gain control over their product and, started being able to compete on price and to set fares without having to get the approval from the Civil Aeronautics Board (CAB) (Robertson & Ward, 1983). Deregulation process in the United States served as a starting point for the industry and later, other markets of the airline industry started adopting this neoliberal approach, leading to the current predominant competence in the industry.

As a result of Deregulation of 1978, Doganis (2010) points out that revenue or yield management became an essential marketing tool due to the complexity of fares and fare types that emerged within an extremely competitive and rapidly changing market. Nowadays, revenue management involves the control of fare access through the airline's reservation control system to maximise total passenger revenue per flight, and as Doganis (2010) highlights, "revenue management is equally crucial for both the network and the low-cost business models" (p.274).

As deregulation has come about, today, the situation could not be more different (Shaw, 2016) and the pace of change in the industry has accelerated. Therefore, airlines now have to accept the challenge of keeping their knowledge updated in a rapidly marketplace. For this reason, Shaw (2016) argues that "successful airlines are those that conduct a thorough and ongoing review of their marketing

environment and take full account of this in preparing their marketing policies” (p.84).

I.II.III Factors Affecting Airlines Image.

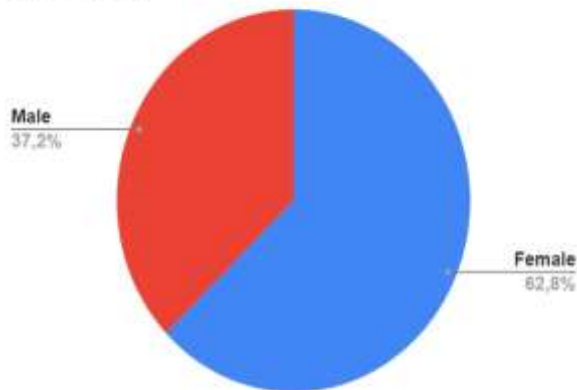
The airline product consists of tangible and intangible elements. When passengers purchase a flight ticket to travel with an airline, they are purchasing more than the airline product, they are also acquiring its benefits and including their customer experience, which they associate with it (Camilleri, 2018). Airlines do have an image associated to them, sometimes the perception about an airline that consumers have in their mindset is formed by former experiences with that specific airline or by the current data and information that perceive and receive from the media, the Internet, advertisements and so on. Airlines are aware of the relevance that a positive image cause into consumers and, in that sense, emphasise their brand values and promote their brand through ongoing campaigns so that the airline’s image is preserved and presented in a favourable way for the airline.

To establish an image, an airline needs first to identify its market position and marketing strategy. Low-cost carriers and full-service carriers implement different approaches when it comes to projecting its brand and positioning. For instance, low-cost carriers such as Ryanair differentiate themselves from competitors by promoting themselves as the airline with the lowest fares in the market, counterbalancing these low fares with large economies of scale and with high load factors and large volumes of passengers. This is an example of how an airline projects its brand image, other airlines, however, emphasise other features of their brand such as the fact of offering high quality services under high standards of customer service and safety, luxurious and unique experiences, the reputation of flying with an airline and so on.

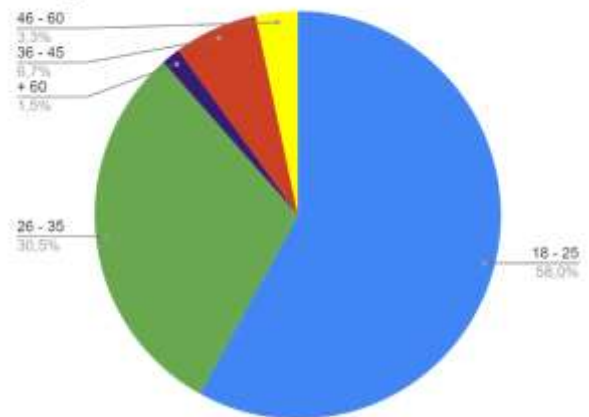
Given the importance of the image that airlines project into the market, there might be factors affecting the image of an airline that might be out of the control of the airlines. In that sense, Camilleri (2018) explains that many of the facilities of the airports are under the direct responsibilities of airport authorities, however, the customers might not be aware of this, and very often they may consider these elements as part of their overall airline package, therefore, their customer experience may be affected by each of these aspects. This might represent a threat for airlines because if an airport is under bad maintenance conditions, with non-available services, or with services out of order and so on, customers might associate these facts with a bad performance of the airline and therefore, affect the airline’s image in the mindset of their customers.

Annex II. Survey Graphic Results

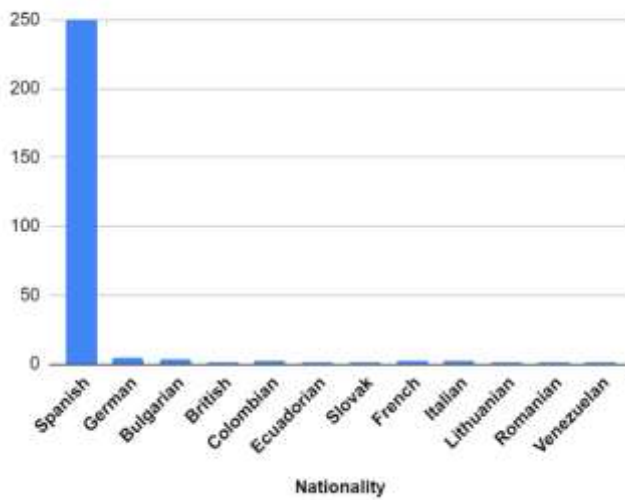
1. Gender



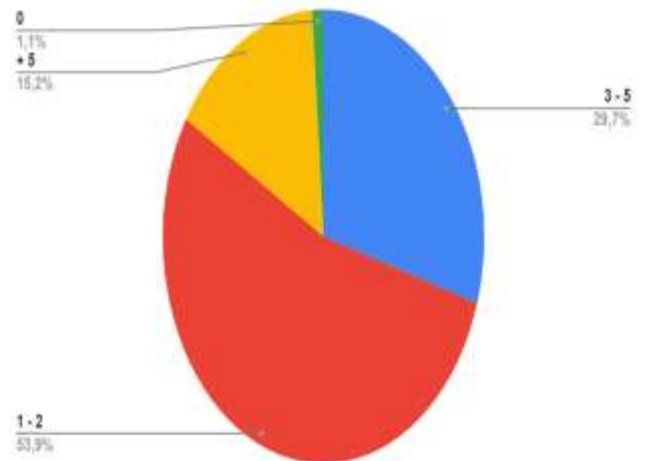
2. Age



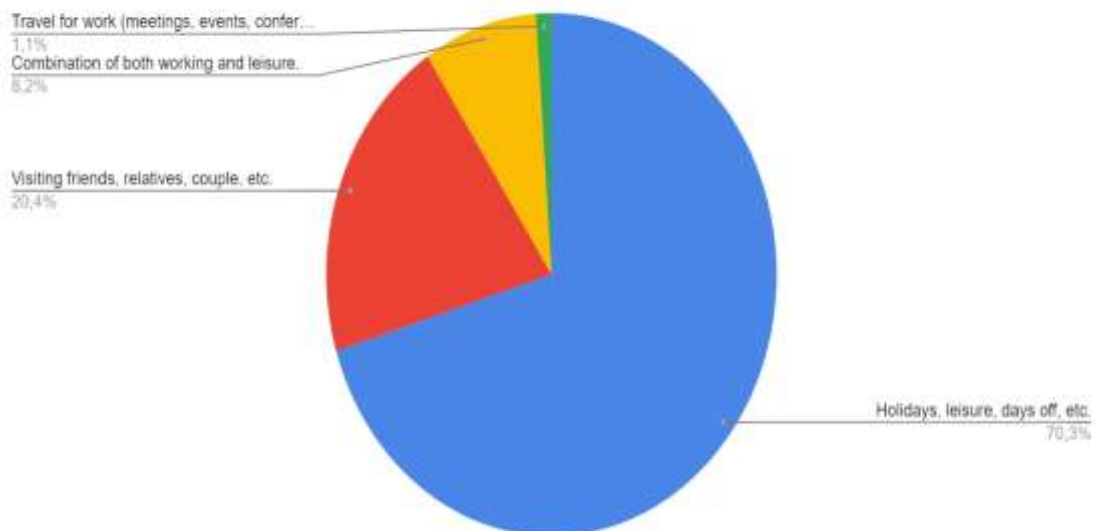
3. Nationality



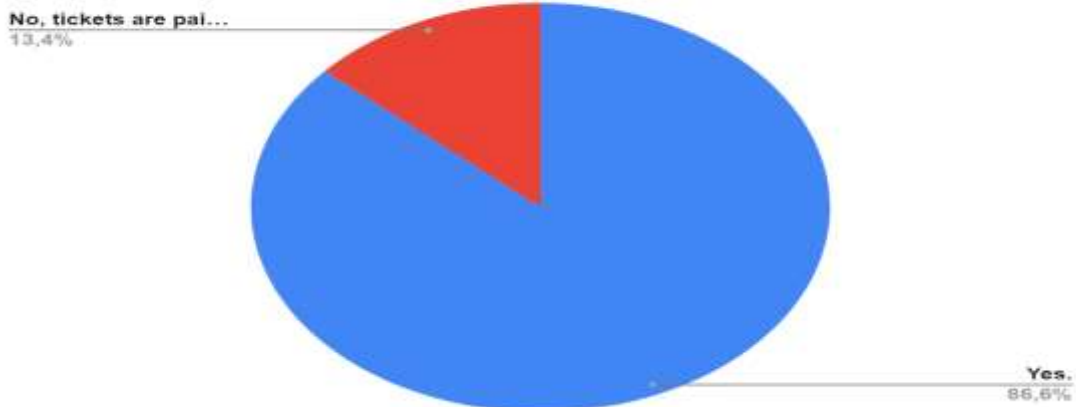
4. Under normal circumstances, before the crisis caused by the COVID-19 pandemic, how many times a year were you used to travel?



5. What is normally the main reason for your travel?



6. When travelling, flight tickets are paid by yourself?



7. Please, rate the following features according to the importance you give to them when buying a flight ticket.

Likert Scale 1 – 5

1-No relevance at all

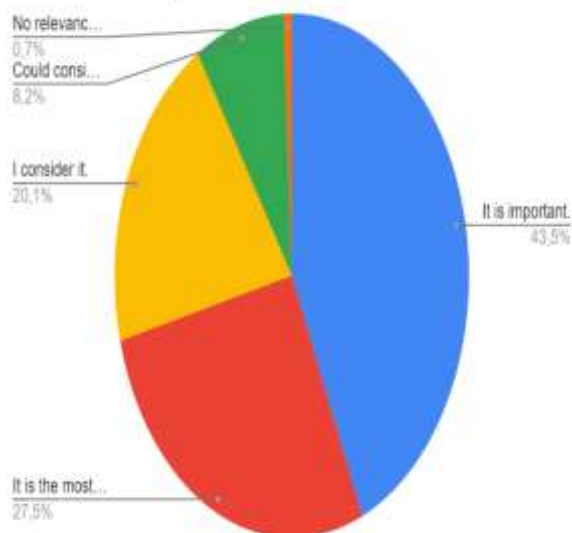
2- Could consider it

3- I consider it

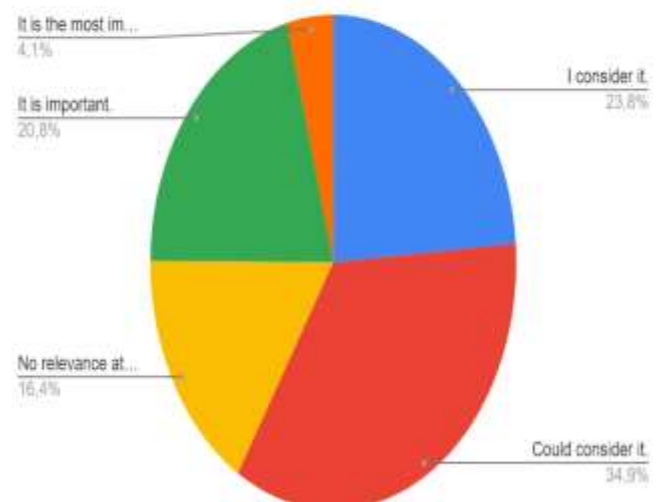
4- It is important

5- It is the most important

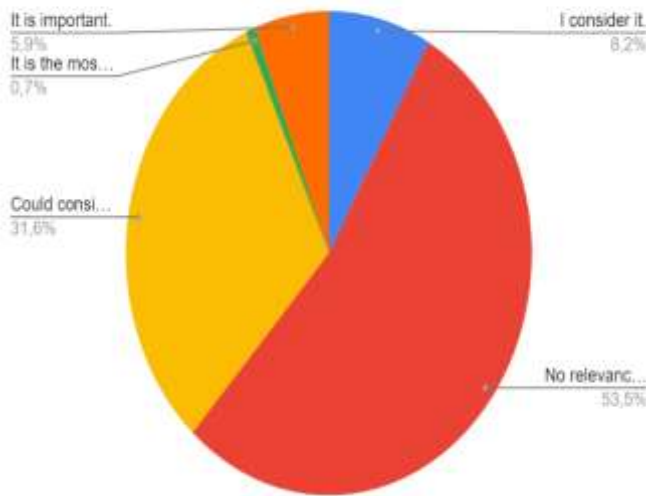
7.1 Low ticket price



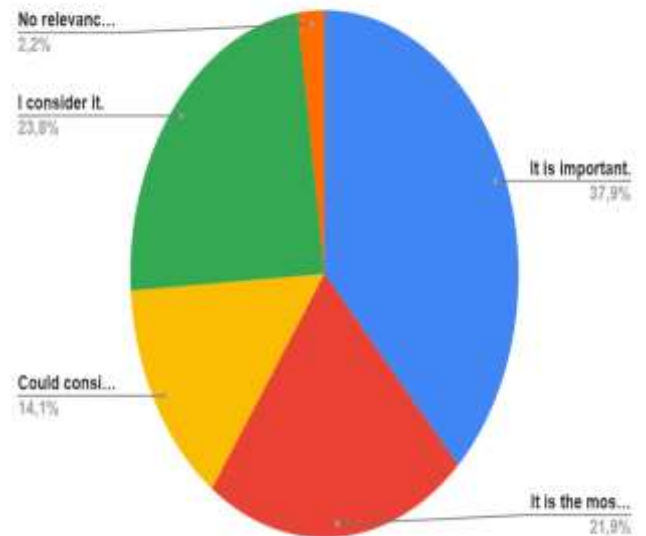
7.2 Quality of service, customer service, services and on-board comfort (seat selection, meals, wi-fi,...)



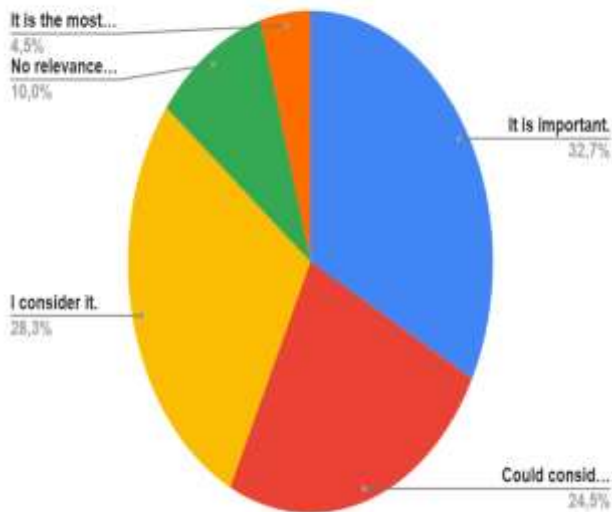
7.3 Accumulate miles and/or points to my frequent flyer programme card of the airline



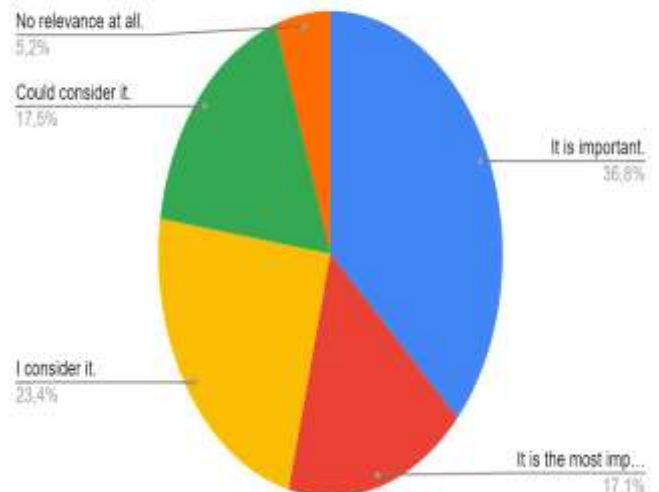
7.4 Schedule availability and different travel options



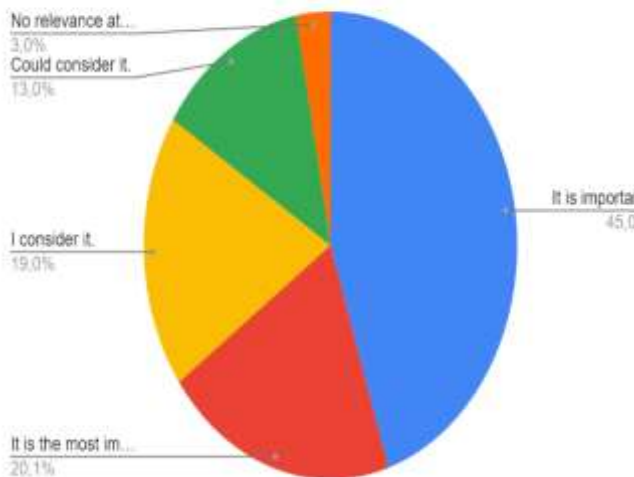
7.5 Cancellation and refund policies.



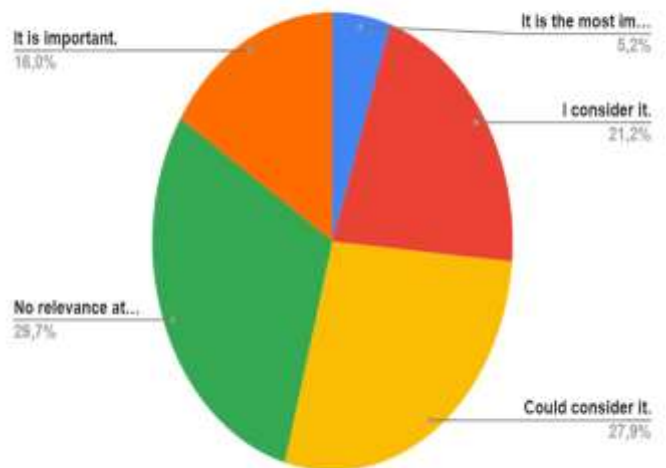
7.6 Former positive or negative personal experiences with the airline



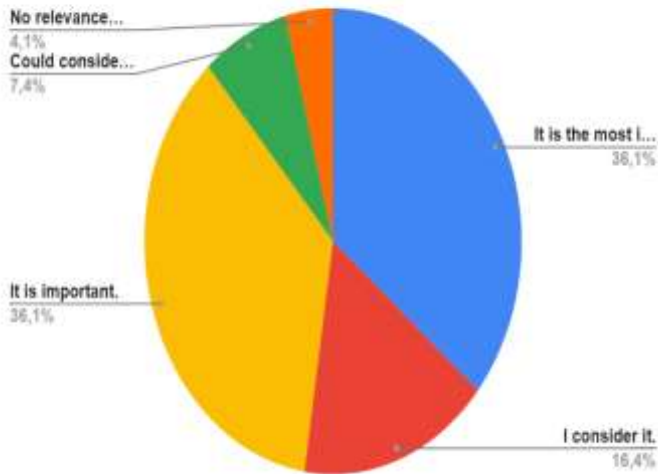
7.7 Hand luggage and checked-in luggage conditions and policies.



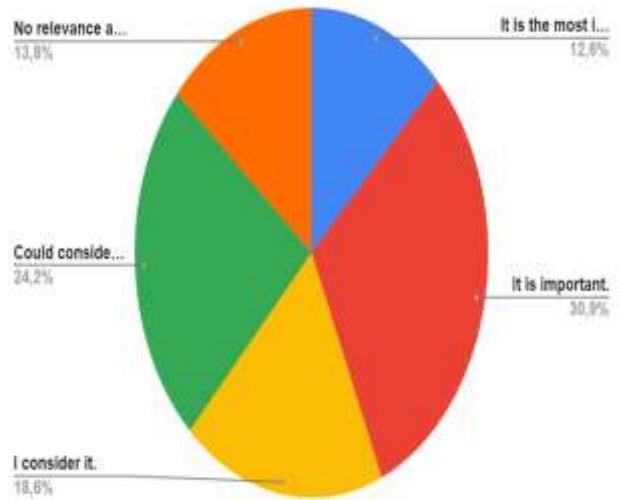
7.8 Promotions and advertising campaigns that I see in the media and the Internet.



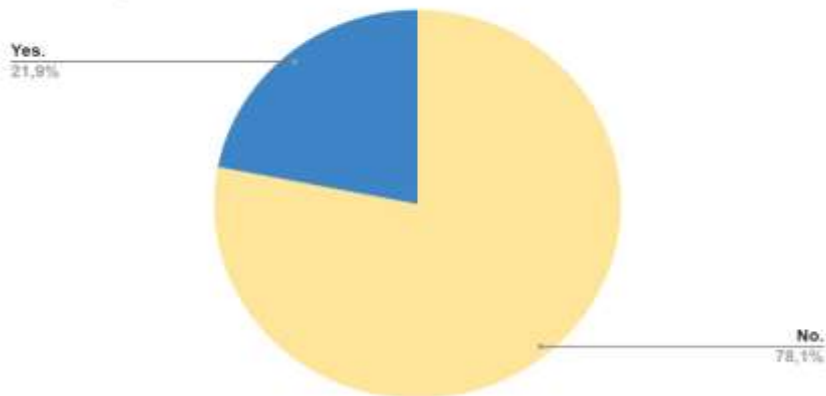
7.9 Existence and availability of direct flights or connection flights.



7.10 Safety record of the airline.



8. Do you remember any specific advertising campaign from a specific airline?



9. If so, could you please briefly describe what the promotion was about and what features were highlighted in the ad?

<Free luggage of 23kg allowance>

<Promotion of a company for holiday packages.>

<Westjet Christmas Ad where the airline gave presents to their passengers. X3 >

<Spanair, if the flight was delayed more than 15 minutes, the airline would refund the flight ticket..>

<Ryanair offering very cheap flights. 20€/flight in Europe.>

< Ryanair low prices X3 >

<Ryanair flights for 5€>

<Iberia, launches advertisements every year with the price for a very cheap trip to places like: United States, Latin America, Asia..>

<Flights to European capitals for 10€>

<Turkish Airlines with Messi X2>

<Discounts for flying post pandemic with flexible cancellation from Vueling..>

<It was a campaign in which you were encouraged to fly again in 2021 after covid. The ad was something like what you would take in your suitcase. (Iberia)>

<Tv ad with babies of Iberia from 1999/2000 (I suppose because it was "cute" the ad with babies); the one with the text message about the Iberia hangar in Barajas for Christmas (for innovation). I am unaware of other advertising actions of other companies.>

<The typical low-cost Vueling where direct flights are offered at low cost with very friendly hostesses...>

<Cancelation policy>

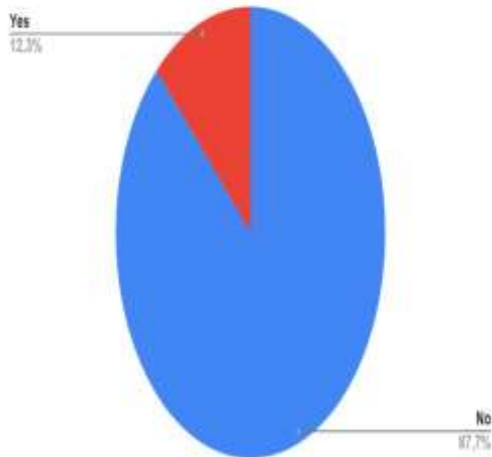
<Iberia advertising campaign promoting the customer points system>

<Jet2.com Friendly low fares>

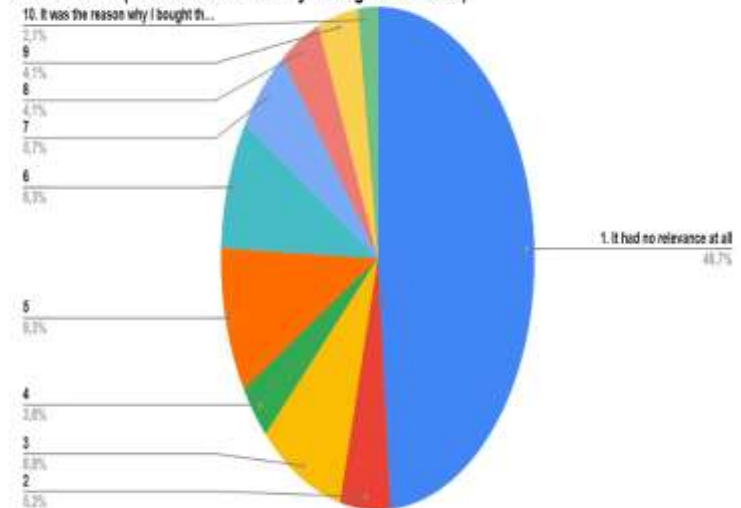
<Lufthansa, transmits luxury and confidence X2 >

<Qatar airlines, promotional campaign to offer 4 and 5-star hotels at prices of 20 euros per night if during the trip you stop in Qatar for up to 4 nights.>

10. Did that campaign or promotion made you buy a flight ticket for travelling with that airline?



11. To what extent did it influence your purchase decision? From 1 (It had no relevance at all - to - 10 (It was the reason why I bought the ticket)



12. Which airlines do you normally travel with?

