
CARVING A NICHE FOR THE NO-FRILLS CARRIER, AIR ARABIA, IN OIL-RICH SKIES

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ABSTRACT

The concept of introducing a no-frills airline to the wealthy Arab region presented its risks. This independent study sought to position the new airline in the marketplace. After three focus groups and 400 self-administered surveys, safety (#1) and price (#2) are low-fare carrier considerations whereas safety (#1), punctuality (#2) and price (#3) apply for full-fare airlines. Recommended ways for the no-frills carrier to reach the market include newspaper ads, travel agent sales, online bookings, and call centers. Additionally, respondents appeared to evaluate this low-fare carrier as if it is a full-service airline.

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INTRODUCTION

The no-frills sector of the airline industry has become more established, which has resulted in increasing competition between low-cost and full-service carriers. Attention has focused on the successes and failures of the no-frills airlines; their operations have been analyzed, compared and reviewed (Gilbert, Child & Bennett, 2001; Jarach, 2004; Lawton, 2003). The successful Southwest airlines model has often been the benchmark for no-frills operations throughout the world (Leavy, 2003), and the template continues to be copied in many countries (Jarach, 2004). The announcement that the low-fare, no-frills model was being introduced into the oil-rich Middle East market appeared to be a contradiction.

This study focused on consumer response to the no-frills carrier, Air Arabia, beginning its air service from Sharjah airport in United Arab Emirates (UAE). The research was guided by two objectives. First, would the traveling public be receptive to the low-fare airline? Second, would eight typical factors used by customers when considering a full-service carrier have (dis)similar responses when the no-frills airline was an option? The startup presented a window of opportunity to pursue a study about the western culture low-cost, no-frills airline template being introduced to the Arab world for the first time. Additionally, Air Arabia was entering a market that was already dominated by Emirates Airlines, one of the world's best.

LITERATURE REVIEW

A low-cost airline business model is typically a niche strategy. "It is aimed at getting benefit from offer vacuums and from the service for pariah customers, starting from visiting friends and relatives, ethnic and leisure based movements and later climbing up to reach cost-conscious business travelers" (Jarach, 2004, p. 25). The emphasis on costs makes the distinction between full-service and no-frills. Jarach explained that the low-fare, low-cost operations require "a much more radically deeper reengineering of the entire value proposition and are not definitively sensitive only to one shot actions" (p. 26).

If an airline is classified as a low-cost carrier, then it must pursue a low-cost operational structure. This means offering fares lower than the full-service scheduled airlines' ticket prices (Gilbert, Child & Bennett, 2001). Combining comparative tables about full-fare and low-fare airlines (Gilbert, Child & Bennett, 2001, p. 314; Lawton, 2003, p. 178) noted that no-frills carriers were distinguished by few if any amenities and point-to-point transportation (see Table 1).

A low-cost carrier will take market share from an incumbent at market entry in addition to carving out a new market space (Jarach, 2004; Lawton, 2003). However, pursuing a low price strategy has the potential to put the company at risk (Garda & Marn, 1993). Thus, low-cost carriers' marketing strategies include advertising and promotions concentrated in secondary airports' catchment areas to building a corporate culture that is fun and exciting for passengers (Gilbert, Child & Bennett, 2001).

Table 1. Comparison of Characteristics of Low-Fare Airlines and Full-Fare Airlines

Low-fare Airline	Full-fare Airline
Simple brand-low-fare	Complex brand—price + service
Online and direct booking	Mainly travel agents
Reservations by telephone and Internet	
Simple ticket price structure and ticket less check-in	Complex fare structures
Use of secondary, low-charging airports (some exceptions)	Tickets produced for each booking
Located around major population centers	Focus on primary airports
High aircraft utilization—quick gate turnaround time	
Do not interline; point-to-point service	Lower utilization of aircraft
Offers non-stop routes	Interlining important part of service; hub and spoke services
Simple product—all additional services and facilities charged for, e.g., credit card bookings, late check-in, meals	Complex integrated service product(s), e.g., ticket flexibility, business lounges, frequent flyer program
Focus on ancillary revenue generation—advertising ('the plane as a billboard'), on board retailing (more common in Europe)	Focus on primary product
Mainly short-haul focus	
Common fleet type acquired at very good rates	Short and long haul
Single type of aircraft	Mixed fleet
Single class configuration	
	Cabins are usually divided into two or three classes to allow for different degrees of in-flight service
No complimentary in-flight meal service	Complimentary in-flight meal and drink(s)
Aggressive yield management by implementing various price levels and capacities depending on load factors and when tickets are purchased	Yield management by filling up set-price classes in order of bookings
Minimum cabin crew on board	
Only operate core activities. Outsource most operations	Cabin crew more numerous as required
	Less outsourcing of operations

Low ticket prices do not preclude no-frills carriers being concerned about value propositions that satisfy passengers' needs and wants (Lawton, 2003). Regular industry surveys question whether people are willing to fly with a low-cost airline. They focus on efficiency factors such as punctuality, scheduling, seating, and routes (Gilbert, Child & Bennett, 2001). Measuring willingness to fly alternately addresses the uncertainty felt by the public when choosing to travel by air (Lawton, 2003).

Beyond the basic efficiency factors, Bruning (1997) identified that customers' choice was also affected by country of origin and national

loyalty. The traditional *one carrier, one flag carrier* model (Jarach, 2004, p. 29) identified that an airline's country-of-origin cued passenger expectations which in turn contributed to the carrier's reputation. Bruning (1997) explained that national loyalty stemmed from ethnocentrism and reference group manifestations that linked to in-group identity. Country of origin was the cue held globally whereas national loyalty stemmed from the felt identity of those who lived in the country or those who were born to the country.

METHODOLOGY

The study

Data collection for this study was conducted in two stages. The first stage was three focus group discussions. The second stage was a self-administered survey distributed throughout various public locations, that is, shopping malls and coffee houses, in the two emirates of Dubai and Sharjah.

Focus groups

Five people participated in each of the three focus groups. The first group was of single people still living at home but likely to use the airline for travel to visit relatives. The second group was of couples where one or both potentially traveled to nearby countries on business and/or purchased air travel for family holidays. The third group was of students living in the university dormitory who traveled by air between home and school. The groups were chosen following the literature search as likely passenger segments that would consider flying no-frills (Jarach, 2004). Low-fare, no-frills air travel was being introduced to the region for the first time when this study took place. Topics discussed included customers' expectations, concerns and likelihood of traveling with a no-frills airline.

The focus group respondents felt that the startup airline would appeal to three groups of people: (a) the price sensitive, that is, the UAE working class who have low household income levels and the laborer expatriates who travel only to their home country for vacations; (b) the frequent flyers, that is, students traveling to home during holiday periods and business travelers whose companies were locally rather than internationally based; and (c) the leisure travelers, that is, families flying to vacation destinations.

The focus group discussants concluded that the most likely passengers would be the frequent flyer students and leisure travelers. The close proximity of the UAE to other countries in the region means students can fly home for weekend visits; quick trips are not a burden to the family financial resources. It was not feasible to include laborers as respondents. The cultural barriers that surround laborer employment mean that they work long hours, six or more days a week; they return to their barrack type housing by company bus at the end of the day.

Questionnaire

Questionnaire development followed the focus group sessions. The survey instrument asked about eight factors: (a) price of the ticket, (b) social class of fellow passengers, (c) punctuality of on-time departures and arrivals, (d) time that flights were scheduled to depart/arrive, (e) safety, (f) service on board, (g) seat size and spacing, and (h) entertainment facilities offered on the aircraft. Answer options were a 5-point Likert scale with 1 meaning not very important to 5 meaning very important and 3 meaning neutral. Respondents were asked to consider the eight factors as independent. Each factor was given equal weight.

The eight factors were set in two sets of questions. The first group related to traveling with any airline (*eight factors, any airline*). The second set referred to traveling with a no-frills carrier (*eight factors, no-frills*). The two sections were separated to prevent respondents from duplicating their replies from one series of factors to the other. The questionnaire was pre-tested by ten people from the sample population. Minor changes were made before the final self-administered document was distributed. Convenience was the primary sampling method although judgment of the fieldworkers was also required.

Analysis

The data was first explored for normalcy. It was not normally distributed according to the Kolmogorov-Smirnov and Shapiro Wilk tests; the p value was $< .05$. Had the p value been non-significant, $> .05$, then it would have fit the criteria for normal distribution (Field, 2000). Two non-parametric tests were used: chi-square for goodness of fit and the Wilcoxon Signed-Ranks test for comparing two sets of scores from the same subjects. Mean and median were obtained for the eight factors, any airline, and the eight factors, no-frills.

THE FINDINGS

The respondents

The demographic questions were limited to age, marital status, where respondents lived and the frequency of travel. Regarding age, 47% were 21 years or younger, 32% were 22-35 years and 21% were 36 years and older; the percentages reflected the country demographics. For marital status, 62% were single and 38% were married or divorced. Less than 30% of the 360 respondents lived in university residences. Selecting one or more of the three reasons respondents would travel by air, they said (a) flying home, including visits to relatives, (88%); (b) flying for holiday travel (56%); and (c) flying for business (19%). The UAE population is dominated by expatriates, which

explained the high percentage of those flying home. The UAE geographic location means frequent vacation trips to other countries are accessible and quite common, which accounted for the high percentage of those flying for holiday. Thus, the respondents were representative of the potential passengers who would travel with an airline that served nearby destinations.

Segmenting by age, income and frequency of travel

The variable "would consider flying no-frills" was cross tabulated with age. As shown in Table 2, the break point for decreasing percentages was 21 years and younger, (75% saying yes) and 22 years and older (67% saying yes). In the regional culture, which includes Arabs and South Asians, people marry at a young age and by the end of the university years they have family responsibilities. Before graduation, air travel is typically paid by parents who choose low fare options. Later, when purchasing their own tickets, people seek the Arab hospitality service standards offered by full-service airlines. Although the chi-square was not significant, the p value was close at .052 for the cross-tabulation.

As noted in Table 2, the willingness to fly no-frills decreased as respondents' income increased. Those earning less than 5,000 UAE Dirhams (AED) per month (AED5,000 = US\$1,370.00) said they would likely fly no-frills (80%). Similar percentages were obtained for the other income categories: AED5,001-10,000 (70%) and AED10,001-15,000 (71%). In the AED15,001+ per month income group only 46% said they would consider flying no-frills. Chi-square for "would consider flying no-frills" and income was significant at $p = .000$.

As indicated in Table 2, the three categories for travel frequency (flying home, flying for holiday and flying for business) were cross tabulated with the variable "would consider flying no-frills." Respondents were less likely to consider the no-frills option as the number of trips per year increased. The break point for flying home was 1-3 trips per year (75%); flying for holiday was 1-2 trips (50%) and flying for business, 1 trip (18%). Chi square was significant at $p = .034$ for traveling for holiday and $p = .001$ for traveling for business.

Table 2. Percentage of respondents who would consider flying no-frills by age, income and travel frequency

Age % Yes (in years)	Income % Yes (in AED)	Travel frequency % Yes (trips per year)		
21 & younger 75%	< 5000 80%	Flying home	For holiday	For business
22 & older 67%	5001-10000 70%	0 trips 12%	0 trips 45%	0 trips 82%
	10001-15000 71%	1-3 trips 75%	1-2 trips 50%	1+ trips 18%
	15001 + 46%	4+ trips 13%	3+ trips 5%	
p = .052		p = .000		p = .034
				p = .001

Factors to consider – product and price

The eight usage factors focused on elements of product and price. Data analysis was conducted first for the any airline group. Next, the no-frills group was considered. All were framed in individual questions "how important is *factor* to you, on a scale of 1-5." The results, as reported in Table 3, include: (a) percentage of respondents who selected important or very important (answer options 4 and 5), (b) the mean and median of the 1-5 scale; (c) the position ranking the mean of each factor closest to the very important (answer option 5) end of the scale; (d) standard deviation; and (e) cross-tabulation of factor importance with yes responses to variables "would consider flying any airline" or "would consider flying no-frills."

Airline safety was the most important factor to respondents, regardless of the carrier type (4.22 mean, SD 1.063 for any airline and 4.18 mean, SD 1.057 for no-frills). The factor of least concern was entertainment facilities (3.21 mean, SD 1.182 for any airline and 3.12 mean, SD 1.234 for no-frills). Overall, the mean responses for the any airline factors were incrementally higher in importance, that is, closer to 5.0, than what respondents had to say about the no-frills factors. Cronbach's alpha was used to assess the internal reliability of the sixteen factors with a result of .803.

For any airline, punctuality (mean 3.95, SD .957) was the second highest rated factor (closer to 5.0), followed by ticket price (mean 3.91, SD .961) at third. For a no-frills carrier, ticket price (mean 3.94, SD 1.053) was the second highest rated factor and punctuality (mean 3.83, SD .991) was third. The other factors, that is, social class of fellow passengers, time that flights were scheduled to depart/arrive, service on board, seat size/seat spacing and entertainment facilities held the same fourth to eighth position for both any airline and a no-frills airline. But there was significant statistical difference with ticket price, social class of other passengers, punctuality, flight timings, service and seat spacing.

The Wilcoxon non-parametric test for two related samples determined that three factors (see Table 3) had z scores with significant p values: price (z

= -2.095, $p = .036$), punctuality ($z = -2.221$, $p = .026$) and service ($z = -2.770$, $p = .006$). The test statistic for each was based on the positive ranks. This concluded that when respondents were choosing to fly any airline, then price, punctuality and service were more likely to be considered and compared as a means of obtaining the best fare and service options. Alternately, when choosing to fly a no-frills airline, passengers already knew what to expect (for price, it was low-fare, for punctuality, the flights were point-to-point, and for service, it was no-frills). Additionally, the more robust parametric paired samples test was run for the two sets of eight factors. Significant p values were obtained for price ($t = 2.121$, $p = .035$), punctuality ($t = 2.222$, $p = .027$) and service ($t = 2.753$, $p = .006$).

The dichotomous yes-no question "would you consider flying Air Arabia" was cross tabulated with each of the eight factors for any airline and then for a no-frills airline. For any airline, chi square significance was obtained for price ($p = .000$), punctuality ($p = .015$), service on board ($p = .004$) and seat spacing ($p = .013$). For a no-frills airline, chi square significance was obtained on the following cross-tabulations: price ($p = .004$), other passengers ($p = .014$), punctuality ($p = .036$), flight timings ($p = .009$), service on board ($p = .030$) and seat spacing ($p = .023$). Only safety and entertainment did not have significant p values.

Table 3: Factors considered for any airline and for no-frills carrier

any airline										no-frills carrier				
% ^(a)	Mean ^(b)	Rank ^(c)	SD	Median	Cross-tab ^(d)	Factors	% ^(a)	Mean ^(b)	Rank ^(c)	SD	Median	Cross-tab ^(d)		
71	3.91	3rd	0.961	4	77% p = .000	Ticket Price (z = -2.095, p = .036)	67	3.94	2nd	1.053	4	72% p = .004		
50	3.40	7th	1.054	3	47%	Other Passengers	46	3.39	7th	1.091	3	43% p = .014		
71	3.95	2nd	0.957	4	74% p = .015	Punctuality (z = -2.221, p = .026)	65	3.83	3rd	0.991	4	69% p = .036		
55	3.50	5th	1.241	4	54%	Flight Timings	52	3.49	5th	1.180	4	51% p = .009		
77	4.22	1st	1.063	5	76%	Safety	74	4.18	1st	1.057	5	77%		
60	3.71	4th	1.050	4	55% p = .004	Service (z = -2.770, p = .006)	55	3.57	4th	1.144	4	50% p = .030		
51	3.48	6th	1.095	4	49% p = .013	Seat spacing	50	3.43	6th	1.102	4	48% p = .023		
43	3.21	8th	1.182	3	43%	Entertainment	40	3.12	8th	1.234	3	41%		

(a) % of respondents answering "important" and "very important" for the factor;

(b) mean for all respondents answers on the 5-point Likert scale;

(c) the mean values' position closest to 5.0 meaning very important;

(d) % = respondents who answered "important" or "very important" to the factor and "yes" to "would fly no-frills" cross-tabulation; p value is chi square results

Reaching the market – promotion and place

Promotion activities that would reach the target marketing were required when no-frills air travel was being introduced to the Arab region. Respondents favored advertisements through newspapers (80%) and television (64%). Directed promotion to specific target segments received limited support. For example, campus or university publications were supported by only 30% of the student-aged respondents while respondents in business (29%) felt that business magazines had limited value.

The preferred communication medium for making reservations was through a travel agent (58%). This was followed by booking online (51%). Speaking to an agent at a call centre was third (48%). Chi square significance ($p = .001$) was obtained for the cross-tabulation age and booking online. Two groups, 21 years and younger (52%) and 22-35 years (62%), indicated higher preferences for reserving air travel via the Internet than did the 36 years of age and older segment (34%).

DISCUSSION

Given that it was only days before the airline commenced flights, surprisingly 46% had not heard of the airline. However, when told of the startup, 40% expected the airline to be successful while 35% said they did not know. In the marketplace, it was noticeable that promotional activities, including advertising and news releases, were scarce. The Internet site for reservations was made operational only a few short weeks before the first flight; the call centre was opened only two weeks in advance. A multi-page insert in an Arabic version of a local newspaper announced when flight operations had begun. No insert was included in the English language version of the same paper. Thus, a large consumer segment was excluded as the target from the promotional material.

Response to the importance of the eight factors, for both any airline and no-frills, cross tabulated with the variable "would you consider flying Air Arabia" indicated that respondents assessed Air Arabia similar to any airline when considering ticket price, punctuality and safety (see Table 3). The findings implied initial hesitation towards Air Arabia until the traveling public was more familiar with the carrier or until the airline built its reputation.

The non-parametric Wilcoxon Signed Ranks test for the eight factors, any airline and the eight factors, no-frills identified significant z scores for price, punctuality and service, based on positive ranks. The interpretation was that respondents expected low fares from a no-frills carrier. Customers were more likely to question the ticket prices being charged by a full-service carrier. The same for service; the traveling public knew what to expect from a no-frills carrier, but comparatively assessed the service offerings when

flying full-service. For punctuality, respondents were more likely to question whether flights arrived/departed on-time for full-service than for no-frills. Since the low-cost airline was point-to-point, it stands to reason that punctuality would not be as critical. On the other hand, if making connections, departure/arrival punctuality would be an important factor.

It was not unexpected that respondents preferred to make travel plans through agents. Ticket fare structure can be discounted at the point of purchase in the UAE, and travel agents tend to engage in discounting. The low response to promotions through student media and business publications indicated that the mass market appeal of newspapers was the more likely medium used by the traveling public when searching for fare specials and holiday flights.

As noted previously in this paper, the sequence of the eight factors for any airline was the same for the eight factors for a no-frills airline for position one and positions four through eight. This was an indication that the traveling public has many points of reference to be satisfied regardless of airline type. Additionally, the cross-tabulation of "would consider flying no-frills" with the eight factors produced chi square significant results for all except safety and entertainment on board. Arguably, this indicated that the respondents had high customer satisfaction expectations about the Air Arabia startup.

Overall, respondents appeared to be more critical of the new carrier, Air Arabia. The question was whether country-of-origin and national loyalty cues had contributed to their critical answers. The UAE is made up of seven emirates; each functions to some extent as its own country. Each emirate has its own cultural identity and government under the umbrella auspices of the richer, more established emirate of Abu Dhabi. Air Arabia established operations from the Emirate of Sharjah, which is less westernized and modern than its neighbor, Dubai. Sharjah also carries a stigma that it is regressive and restrictive due to the conservative dress codes and alcohol prohibition. The fact that respondents appeared to set higher standards for the no-frills startup suggested that country-of-origin cues (Air Arabia originating from Sharjah) influenced the results. National loyalty (pride in a national carrier) would be expected to offset country-of-origin concerns. If this had been the case, there would have been fewer significant chi-square cross-tabulations when the traveling public considered whether to fly Air Arabia.

When considering the potential market segments available to the low-fare, no-frills carrier, age and income were strong demographic factors: the lower the age and the lower the income, the more likely to use. However, this does not preclude attracting passengers from other segments as noted in the results. At the time of writing, Air Arabia has seemingly acknowledged the age variable given that their marketing now incorporates South Park-type

characters attired in traditional Arab garments. Linking the adult animation figures to the Arab culture in such a way may arguably be considered as country-of-origin or national unity cues.

Limitations and future research

No study, including this one, is without limitations. Central to the research were the eight factors as they applied to any airline and to no-frills service. Each was approached as being independent and isolated one from the other. Under actual conditions, people searching for air travel may incorporate two or more and thus weight each differently rather than equally. A more in-depth examination of the factors would provide valuable insight about passenger preferences when no-frills air service is a travel option. Additionally, the eight factors were not all encompassing; this study focused on the ones most common from the literature (Gilbert, Child & Bennett, 2001) and likely the most fundamental.

Future studies would include gender and nationality. Had these demographics been included, more information would have been available about consumer segments. It may be argued that the sample was not truly representative of the population. Being aware that convenience and judgment sampling presented this risk, every effort was made to approach a variety of people to overcome the bias.

The timing of the study had its limitations. Air Arabia was about to launch and yet the public was largely unaware of the startup. This weakness was offset by the fact that respondents based their answers on personal reflection. Respondents had not been swayed by marketing efforts announcing the new carrier. The next research would involve the same set of eight factors studied more in-depth. Country-of-origin and national loyalty would be key issues to pursue.

CONCLUSION

Overall, the research results supported the view that Air Arabia would be able to compete successfully in the Arab region over the long term. Respondents, representing the traveling public expressed their willingness to consider a low-fare, no-frills option when making air reservations. Additionally, they expressed their confidence in the startup as noted in the similar percentages attributed to the eight factors, any airline and the eight factors, no-frills. No factor had results that indicated uncertainties and/or generated negative comparisons with full-service carriers.

The findings indicated that Air Arabia had the opportunity to pursue a greater share of the traveling public market through (a) increasing promotions to create awareness and (b) addressing the factors that concerned people when considering an airline. For example, the initial marketing

efforts could have given safety assurances by mentioning that (a) experienced Canadian pilots were at the controls, (b) Airbus A-320 planes were latest off the assembly line, and (c) ground personnel had undergone extensive training to be qualified. The intended message would have been directed at overcoming and/or negating any hesitation felt by prospective passengers.

Given the nature of the UAE air industry and open skies policy, Air Arabia would be wise to operate within the criteria of a low-cost carrier as defined earlier in this paper. This would provide the differentiation they need in the very competitive marketplace. Maintaining this niche focus becomes more important as Emirates Airline is successfully transitioning the low-cost model of the short-haul carriers, that is, Southwest and easyJet into the full-service offering, long-haul industry. Under such operational guidelines, there is the expectation that ticket prices will be set to compete on the low-cost template (EasyOz, 2005, p. 70).

At the time of startup there was much skepticism whether this low-fare, no-frills airline would be able to attract customers. Public sentiment was that the typical passenger would be the student, and the low income laborer who returned to his/her home every few years. Since this research was conducted, Air Arabia has become a successful operator in the regional air industry. The marketing efforts were revamped and intensified to focus on broadening appeal to the traveling public. Additionally, service was scrutinized so as not to lose customers back to the full-service carriers. Air Arabia continues to operate in the low-fare, low-cost niche. Every year they expand their route network.

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