



SOME KEY ELEMENTS OF THE BUSINESS POLICIES OF PERSIAN GULF AIRLINES FROM THE PERSPECTIVE OF PASSENGER OPINIONS

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ABSTRACT

The two decades preceding the COVID-19 pandemic constitute a well-defined and exceptionally successful time in the history of aviation for the airlines of the Persian Gulf region. Their dynamic development, efficient operational mechanisms, and the innovations they introduced in the field of services played a decisive role in shaping the landscape of global aviation. The exploration of the brand and marketing elements that form an important segment of their business policy has been documented in several of our previous publications. However, the opinions of the passengers have not yet been presented, even though we conducted an extensive investigation on this topic. In this study, we undertake to summarise the results of this broad dataset. Its relevance stems from the very need for feedback, which is a prominent element of the business philosophy of the companies examined, but this synthesis also complements our previous work and makes it more complex. In this empirical research, we measured and analysed the content of the service portfolio in relation to travellers' reactions, the anomalies between brand identity and brand image, the perceived role of the central hubs placed at the focus of the airlines' global expansion, and the cohesive strength of customer loyalty/commitment expected or desired from the target audience.

Keywords: customer loyalty, Gulf airlines, hub-function, lifestyle-brand, opinion of passengers

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A PERZSA-ÖBÖL MENTI LÉGITÁRSASÁGOK ÜZLETPOLITIKÁJÁNAK NÉHÁNY Kiemelt tartalmi eleme az utasok véleményének aspektusából

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ABSZTRAKT

A COVID-19 járványt megelőző, a repüléstörténet vonatkozásában jól körülhatárolható 20 év a Perzsa-öböl menti légitársaságok rendkívül eredményes időszaka volt. Dinamikus fejlődésük, hatékony működési mechanizmusuk, a szolgáltatások terén bevezetett újításaik meghatározó szerepet játszottak a globális légiközlekedés arculatának formálásában. Az üzletpolitikájuk jelentős szegmensét képező brand- és marketingelemek feltárása számos publikációnkban nyomon követhető. Nem került sor azonban az utasközönség véleményének bemutatására, holott ennek kiterjedt vizsgálatát végeztük el. A jelen tanulmányban e széles adatsor eredményeinek összegzésére vállalkozunk. Ennek relevanciáját egyrészt maga a visszacsatolás igénye adja, ami a vizsgált szereplők üzleti filozófiájának hangsúlyos eleme, de a szintézis korábbi munkáinkat is kiegészíti, komplexebbé teszi. Ennek kapcsán ebben az empirikus kutatásban felmértük és vizsgáltuk a szolgáltatáspaletta tartalmát az utazók reakcióinak viszonylatában, a brandidentitás és a brandimázs egymásra vetítése során megmutatkozó anomáliákat, a társaságok globális terjeszkedésének fókuszába állított központi hubok szerepének megítélését és a célközönség felől elvárt/remélt ügyfélhűség/elkötelezettség kohéziós erejét.

Kulcsszavak: vásárlói hűség, Öböl-menti légitársaságok, hub-funkció, életmódbrand, utasvélemények

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1. Introduction and literature review

In our view, the following strategic objectives and aspirations, which have most inspired the travelling public, have been the main drivers of the airlines' operations over the last two decades:

- innovation in services, which is difficult for competitors to follow,
- customer focus,
- a distinct and unique profile that is very marketable,
- successful brand building and marketing policy,
- creation and acceptance of the operational conditions and complex functions of the Persian Gulf hubs that will help to transform global air transport patterns,
- transformation of attitudes towards air transport through developing the idea of 'lifestyle travel' and strengthening customer loyalty.

In the present work, we have categorised the wide range of data available, and within these categories we have included the dimensions that we consider to be the most relevant to the activities and objectives of the airlines studied, playing a key role in their effectiveness while confirming their business philosophy discussed in a number of forums.

Since a brand does not exist as a value in itself (Kapferer, 2008) but is an effective supporter/server of business policies and can only be manifested through the service or product, a simultaneous and interrelated examination of the content of the three interdependent categories (business policy $\Leftrightarrow$ brand $\Leftrightarrow$ service) will help to reveal the interrelationships between them. Over the past more than two decades, a significant number of studies have been carried out from each of these perspectives, contributing to the understanding of the internal system of air transport.

Several studies have analysed or constructed models, developed recommendations (Gillen, 2006; O'Connell, 2006, 2011a; Moreira et al., 2011; Lohmann & Spasojevic, 2018) or examined the components of competitive advantage (Nataraja & Al-Aali, 2011) in the context of reviewing the effectiveness of business strategies. Given the increasing role of brand and marketing, it has become necessary to clarify the theoretical and methodological links between consumers and brands (Aaker, 1991, 1997; Fournier, 1998; Azoulay & Kapferer, 2003), as well as to interpret the conditions of brand building (Aaker, 1996; Kapferer, 2008). Related to this is the definition and positioning of the concepts of brand identity and brand image from the perspective of different theories and models (Aaker, 1997; De Chernatony, 1999; Hoang, 2016; Aksoy et al., 2003; Louis & Lombart, 2010; Park et al. 2005; Keller, 1993; Piskóti et al., 2022).

It is undeniable that the emphasis on service quality as a competitive marketing strategy has become a dominant factor in the last two decades (Grönroos, 1984, 2000; Parasuraman et al., 1993, 2000; Andotra et al., 2008; Parasuraman et al., 1988; Dabholkar et al., 1996; Brady et al., 2001; Robledo, 2001). These studies have been built upon by several aviation-specific theoretical and methodological works, whose main objective was to better understand customer expectations and to define the quality of services (Tóth et al., 2021; Csapó, 2012). There has been a proliferation of research aimed at developing specific

aspects of the service delivery process, and the related conceptual framework and measurement scales (Brady et al., 2001; Wu & Cheng, 2013; Perçin, 2018; Tahanisaz & Shokuhyar, 2020; Shen & Yahya, 2021), but above all the research has sought to determine the level of service quality and, in parallel, customer satisfaction (O'Connell & Williams, 2005; Chen et al. 2011; Wu & Cheng, 2013; Clemes et al., 2008; Suki, 2014; Sultan & Simpson, 2000; Shah et al., 2020; Woo, 2019; Tsafarakisa et al., 2018; Aksoy et al., 2003), including the evaluation of the importance for passengers of frequent-flyer programmes (Martin et al., 2011). However, fewer studies have initiated primary data collection to examine, using large samples, the relationship between airline and passengers (Shafiee et. al., 2014; Mayer et al., 2012; Farooq et al. 2018; Clemes et al., 2008; Gilbert & Wong, 2003).

The extremely rapid development of airlines in the Persian Gulf has not escaped the attention of researchers. The studies focused on the airlines' business models (O'Connell, 2006, 2011a, 2011b; Grimme, 2015), the characteristics and components of their branding (Hoang, 2016), the quality of their services (Ahmad, 2015; Akbal, 2016; Campbell, 2016; Bose, 2018; Douglas, 2018), and even the stability of their business models (Kucsera, 2021) have been studied.

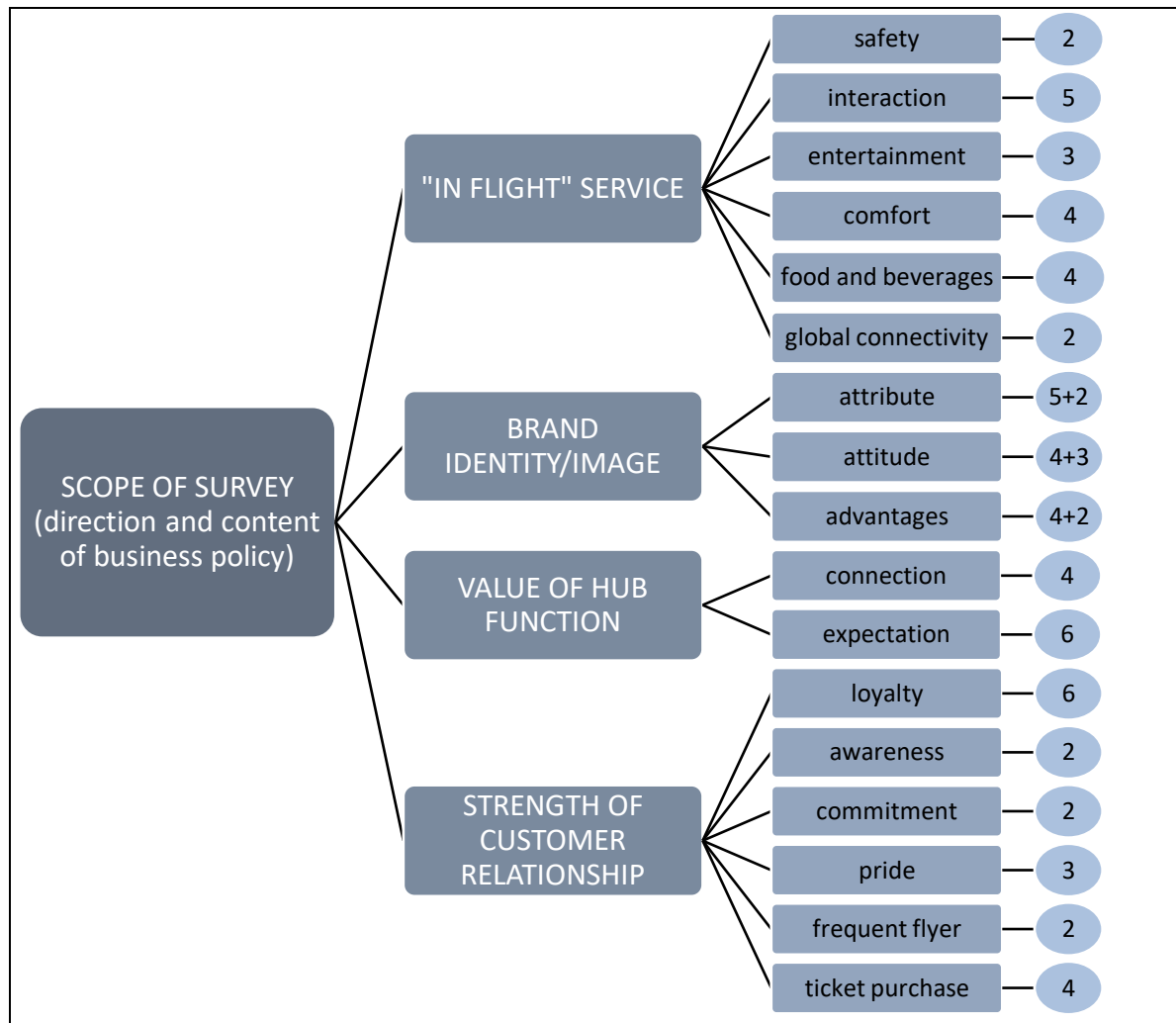
2. Hierarchical model, scope, and content of the study

While acknowledging the value of these studies, we have followed a different approach in our research. By creating four main groups, as opposed to studies that are limited to a single perspective, we have highlighted four main focus areas of Emirates, Etihad, and Qatar Airways' business policies, operations, and professional mission, thus taking a complex approach to assessing the process of the impact on and reaction from the target audience (*Figure 1*).

In contrast to the aforementioned works – which mainly sought to investigate the quality of the service experienced – we were interested in how important the service, brand element/value or business policy concept (stopover, lifestyle brand) was to the respondents, or whether it was even necessary. The distribution and weight of the responses can be used to infer the degree of acceptance, the strength of the customer relationship, and possible correlation between the main groups.

In the first main group, we asked about the service sector. From the very complex and broad field of air transport services, we have focused on in-flight services. We believe that it is here that the relationship between passengers and crew is most pronounced, direct, and enduring. In line with this, we have established the dimensions we consider to be the most important in determining the quality of service – safety, interaction with staff, entertainment, comfort, food and beverages, global connectivity – to which we have added 20 further assessment items (*Table 1*).

Figure 1. Hierarchical model of the study



Source: Authors

Table 1. Dimensions and survey elements of the In-flight Services major group

Dimensions	Survey elements
Safety	Type and condition of the aircraft Ensuring the conditions for flight safety
Interaction with the staff	Simple check-in, helpful staff Convenience of boarding the aircraft Punctuality of the services Dress and appearance of the flight attendants Kindness and helpfulness of the flight attendants
Entertainment	Newspapers and reading material onboard Large selection of in-flight films Large selection of in-flight music
Comfort	Cleanliness of the passenger area and toilets Distance between seats, comfort of seats Accessories onboard (toiletries, cushions, blankets, eye masks, etc.) Power supply onboard

Food and beverages	Quality and quantity of food onboard
	Selection and quality of non-alcoholic beverages onboard
	Selection and quality of alcoholic beverages onboard
Global connectivity	Availability of in-flight phone calls
	Availability of in-flight wi-fi

Source: Authors

According to Aaker (1996), it is worthwhile to compare brand identity and brand image in different image dimensions. In the second main group we analysed the relationship between these two brand categories from a different perspective: the extent to which the brand identity (purpose, core values, vision) is effectively represented and perceived by the target audience – that is, how the signals created, communicated, and transmitted in the brand identity are decoded.

In our survey, we analysed how the complex approach to expressing the inner and outer aspects of identity elicits feedback from respondents (Bozkurt, 2024) (Table 2).

Table 2. Brand image in relation to brand identity

Dimensions	Subdimensions and survey elements	
	Positive	Negative
	Perception	
Business attribute	Flying to many places Their development is unstoppable Have invented many useful Innovations Good marketing Being unfairly attacked	They follow superfluous luxury Being justifiably attacked
Staff attitude (brand)	Service is ambitious Represents a guarantee of quality Sets a fine example for other airlines Likeable	Service is impolite Aggressive business model Unpleasant
Pros and cons perceived by target audience	Cheap Safe Offers a value-for-money service Airplanes are comfortable	Expensive Dangerous (not safe)

Source: Authors

The global ‘connectivity’ of the Gulf airlines required the creation of a hub system of a size and quality that, in addition to functioning as an airport, was also a multimodal organisation integrating maritime links (Castells, 2000; O’Connor, 2010; Alkaabi et al., 2013, Alkaabi, 2014), creating and operating one or more metropolises that, with their influence and wide range of offers, could provide an internationally attractive alternative tourist and business destination. In our view, if this attraction was not strong enough, the system would be fundamentally broken. In the assessment of the hub function, that is, within the framework of the third main group, we tried to explore the demand for stopovers, the role that

passengers expect from airports, and the attractiveness of a city in the Persian Gulf as a destination for a particular flight.

The profitability of airlines is based on attracting and retaining as large a pool of passengers as possible, so in section 4 we analysed the customer behaviour associated with ticket purchasing and the strength of the relationships between the travellers and the airline. Gulf airlines, in order to maintain brand loyalty, are trying to build psychological brand equity that is difficult for competitors to replicate. Naturally, “the desirable brand level would be one in which their passengers feel a sense of pride and prestige when using their services” (Garcia, 2014).

Our research assessed the extent to which there is a shift from the transport function towards a lifestyle change, since the companies studied are those most likely to recognise that “the gains from lifestyle identification with passengers and building brand loyalty may be the missing link in the evolution of airlines” (Garcia, 2014).

In relation to the above, we investigated the main characteristics of passengers' ticket purchasing behaviour, the level of passenger engagement with airlines prior to ticket purchase, and respondents' attitudes towards the frequent-flyer status.

3. Methodology

3.1 Primary database

We found the questionnaire survey to be the most appropriate for our study. The survey was carried out in three steps: designing the questionnaires to reflect the research criteria, developing the conditions for and implementing the data collection, and processing and evaluating the questionnaire data.

3.1.1 Designing the questionnaires

The first step in the process was to define the scope of the questionnaire and the information required in relation to the research objectives, and then to develop logically and substantively coherent groups of questions. To compile the content of the questionnaire, the companies' beliefs were taken as a basis, with the building of clear business objectives and identity being an expression of those beliefs. To do this, we processed into questions the factual statements, signs, and symbols presented to passengers by the airlines.

This step was carried out in the following order:

- We identified the four main categories.
- We collected the content for the questions.
- A large number of opening sets were tested, selected, and commented on.
- The resulting final database was sorted into main dimensions and sub-dimensions for later analysis and evaluation.
- A hierarchical model of the overall structure was set up.

- The technical unit related to the main body of the research was completed with additional questions for other chapters.

- As part of the questionnaire, a demographic and motivation questionnaire was compiled, and an attached name card was created that can be removed by tearing along the perforation.

A 5-point Likert scale was used for the questions. We also included mixed-type questions, adapted to the content. The questionnaires had to be designed for international conditions, in particular the specificities of the multilingual environment, and the cultural differences of the passengers. The questionnaires were written in six languages (Hungarian, English, German, French, Chinese, and Arabic) and were checked by translators for linguistic accuracy and comprehensibility by means of a test.

3.1.2 Developing the conditions for and implementing the data collection

Because adherence to the sampling procedure is a major determinant for the success of the research, we needed to define the following questions for data collection:

- who the target respondents are and what the range of respondents is,
- how the selection will be made,
- where the survey will be conducted,
- when the data will be collected (year, month, day, and time of day),
- who will carry out the specific operational tasks,
- how the field operations will be carried out (e.g., permits, standard presentation, uniform interviewing style).

The original plan was to collect responses from a total of 1,000 to 1,200 participants including passengers from both Persian Gulf and European sites. This did not materialise because the COVID-19 outbreak at the end of the actual survey of European sites interrupted the survey process. Nevertheless, travellers from 59 countries returned a valid questionnaire, which we consider to be adequate.

The sampling locations were Budapest, Dublin, Vienna, Amsterdam, Berlin, and Bangkok (travellers from Europe). The survey was conducted by our research team in two periods: 5-10 November 2019 and 1-15 March 2020. We believe this was a guarantee of a better completion rate. Convenience sampling was used.

A total of 759 people returned the questionnaire. As 46 responses could not be evaluated, those were excluded from the study, leaving 713 questionnaires for further processing. Of the questionnaires that could be used, 545 had all items scored, and 168 had unanswered questions, but the items that were completed were included in the scoring. The sample size of the analyses based on the questionnaires therefore ranges from 545 to 713. The questionnaires were subjected to validity and reliability tests.

3.1.3 Processing and evaluating the questionnaire data

The evaluation of the results followed the structure of our hierarchical model. Following a descriptive statistical analysis of the responses to the thematic units, we interpreted the phenomena of the system and attempted to identify the relationships and associations that existed. Finally, we pointed out the links between the philosophy of the companies and the content (needs, mindset) expressed by the passengers. At several points, further details were provided using demographic and motivational data.

The consistency of the data was validated by determining the Cronbach's alpha.¹¹ Taking into account the variables and items of the database that could be included in the Cronbach analysis (53 items), the alpha value was 0.855, which indicates that the consistency of the data recorded in the questionnaire can be accepted as satisfactory for the research. For the Likert-scale questions, the arithmetic averages of the responses given by the groups of respondents were taken as the primary means, where

$$\bar{x} = \frac{1}{n} \sum_{i=1}^n x_i$$

From these data, the weighted and relative standard deviations from the mean were also calculated. Weighted standard deviation:

$$\sigma = \sqrt{\frac{\sum_i (x_i - \bar{x})^2 f_i}{\sum_i f_i}}$$

Relative standard deviation:

$$v = \frac{\sigma}{\bar{x}} * 100,$$

where $\sigma = x_i$ data series standard deviation, weighted standard deviation, $\bar{x} = x_i$ is a weighted average of the data series.

Statistical analysis beyond the arithmetic mean allowed us to see the additional information behind the mean.

Cross-tabulations were created to show the relationships we considered important and used the most appropriate form of visualisation, multi-axis graphs, to show the differences. Also set up were a number of hypotheses when compiling the cross-tabulations by comparing the factors we considered relevant, and after interrogating and plotting them, only the tables and graphs of notable differences remained for the final study.

¹¹ Cronbach analysis was made using the analytical functions Analyze/Scale/Reliability Analysis of the statistical modelling program IBM SPSS Build version 1.0.0.1447, the output of which is attached (Churchill, 1979).

3.2 Demographic characteristics of respondents

Table 3 shows the structural characteristics of the demographic composition of respondents. Females are slightly more numerous than males, but the proportion is evenly balanced (41% male, 47% female, 12% non-respondents).

The majority of respondents (74.75%) were of European origin, due to the location of the sample, with Asia being the second-best represented continent (8.56%). In terms of age, the highest response was from 25- to 50-years olds (58.06%). The number of people with a tertiary education qualification was also high (68.44%). In terms of income, there was no observable group of respondents, with those with an annual income of over USD 20,000 being the most likely to complete the questionnaire (38.99%), and the second largest group with an annual income of between USD 10,000 and USD 20,000.

Table 3. Demographic data

Indicator	Category	Respondents	
		Number	Rate, %
Gender	Male	293	41.09
	Female	334	46.84
	No reply	86	12.06
	Total	713	100.00
Origin (Distribution Nationalities)	Africa	4	0.56
	Australia	4	0.56
	Asia	61	8.56
	South America	8	1.12
	North America	20	2.81
	Europe	533	74.75
	Middle East	14	1.96
	No reply	69	9.68
	Total	713	100.00
Age in years	1-25	98	13.74
	26-50	414	58.06
	51 and above	150	21.04
	No reply	51	7.15
	Total	713	100.00
Highest level of educational qualification	Primary	14	1.96
	Secondary	133	18.65
	Tertiary	488	68.44
	No reply	78	10.94
	Total	713	100.00
Yearly income, USD	under 10,000	123	17.25
	10,000-20,000	179	25.11
	above 20,000	278	38.99
	No reply	133	18.65
	Total	713	100.00

Source: Database compiled from the responses to the questionnaires

Tourism was the motivation for travel for 45.58% of respondents in the sample, with business travel (19.64%) and family visits (18.23%) being the second most common reasons, with almost equal percentages (*Table 4*). The overwhelming majority (82.75%) of the questionnaires were completed by passengers travelling economy class. In terms of frequency of flying habits, more than half of respondents (53.58%) reported flying several times a year.

Table 4. Distribution of demographic and motivation data

Indicator	Motivation	Respondents	
		Number	Rate, %
Reason for travelling	Family visit	130	18.23
	Tourism	325	45.58
	Business travel / job	140	19.64
	Education / Research	21	2.95
	No reply	97	13.60
	Total	713	100.00
Which class are you flying?	Tourist	590	82.75
	Business	30	4.21
	First class	4	0.56
	No reply	89	12.48
	Total	713	100.00
How often do you fly?	Rarely	120	16.83
	Once a year	148	20.76
	Several times a year	382	53.58
	No reply	63	8.84
	Total	713	100.00

Source: Database compiled from responses to questionnaires

4. Results

The hierarchical model proposed in our study offers a more complex and unique approach to the air transport sector than was done previously. It highlights the most and least important items of passenger opinion not only at the level of the survey items, but also in a comprehensive way, synthesising dimensions and major groups.

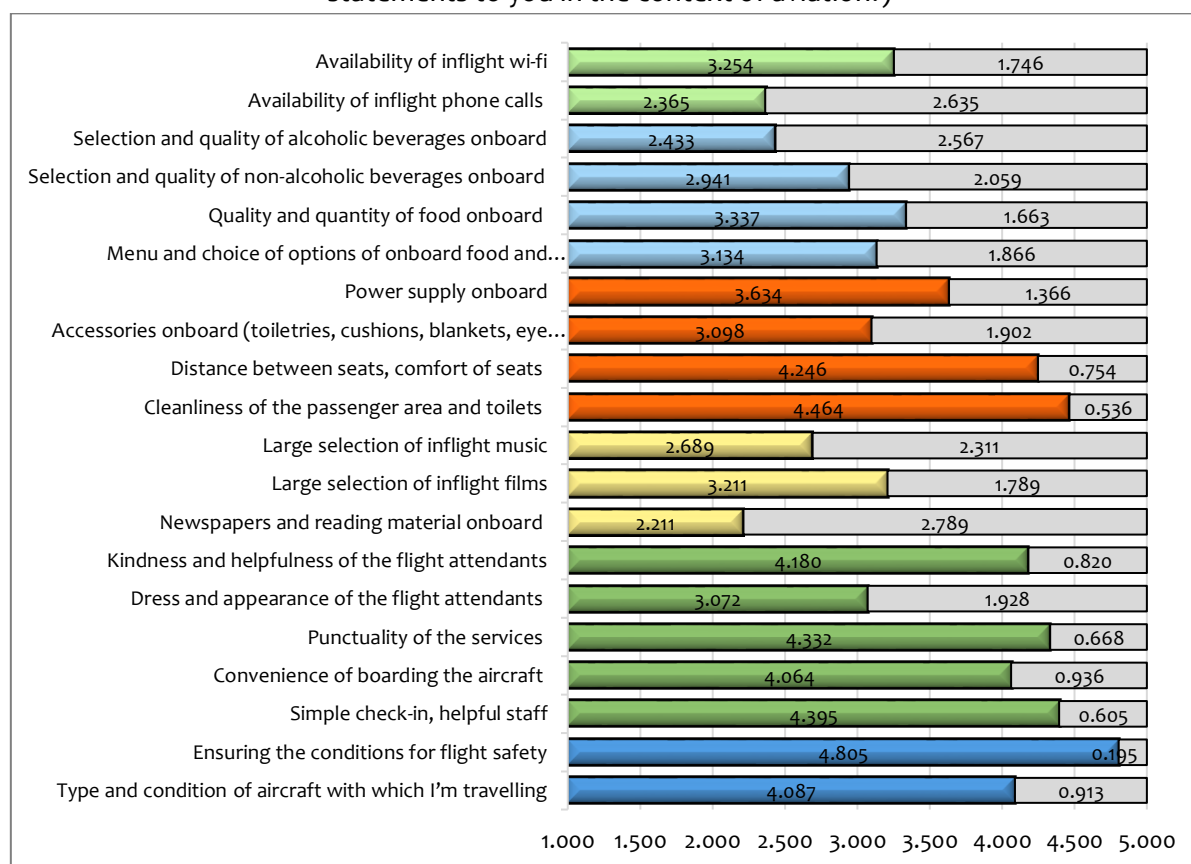
It was not our intention to evaluate the research results by separating or comparing the three airlines; the structure of the questionnaires did not allow for this.

4.1 First main group

The aggregated results of the first main group show that the travelling public does not rate the selected elements of the analysis with the same weight (*Figure 2*). The most important factor is the conditions for flight safety. By contrast, the demand for print media, alcoholic beverages, and telephone connections is very low. This is of particular note because we are

faced with marketing elements such as the Open Sky publication,¹² the wine and champagne programme (one of the prides of Emirates), which was implemented with an investment of hundreds of millions of dollars, or the development of telephone and internet communications which also required significant funds. It is striking that, in addition to safety, the positive attitude of the staff is a prominent criterion for respondents. Their helpfulness and professionalism may contribute in particular to the feeling of security. However, passengers questioned the ability of flight attendants to take advantage of the extremely carefully designed image and the high-tech in-flight entertainment system.

Figure 2. The main and sub-dimensions of in-flight services (How important are the following statements to you in the context of aviation?)



1: Unimportant, 2: Less important, 3: Moderately important, 4: Important, 5: Very important.

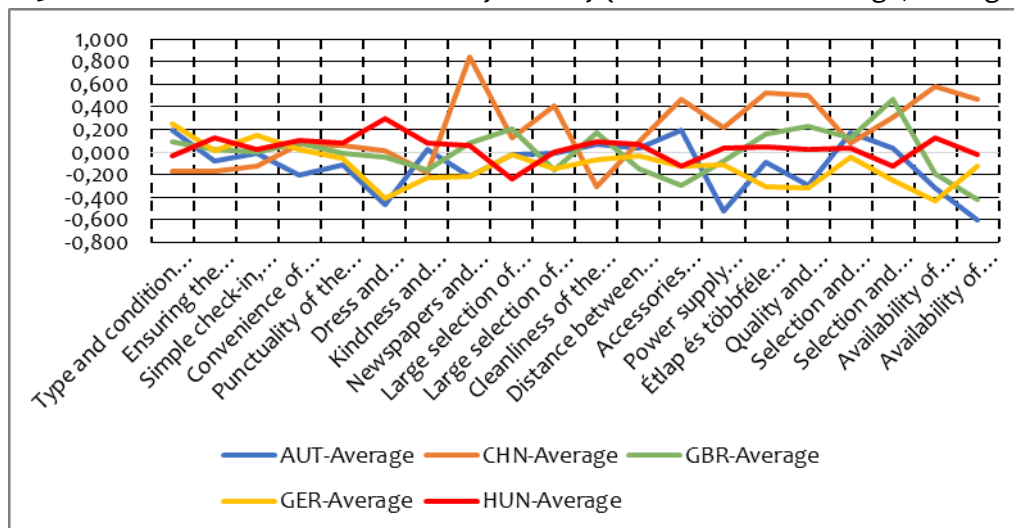
Source: Authors

In a comparison of the main dimensions, safety (dark blue), interaction (dark green), and comfort (brown) were also ranked very highly, with choice of food and drink (light blue), global connectivity (light green), and entertainment facilities (yellow) considered less important (Figure 2).

¹² Emirates' in-flight magazine has been published monthly since 2003, bringing the attraction of flying and the Emirates lifestyle to passengers with a circulation of 5 million copies a month (Motivate Media Group, 2020).

There are observable differences between nations. For Chinese travellers, almost everything is important except safety and cleanliness. They like to read, watch films, collect accessories, and eat and drink throughout the journey. For Germans and Austrians, safety is the overriding factor, while the British judgements are based on the quality of the entertainment offered and the choice of food and drink. Hungarians are average in this respect (Figure 3).

Figure 3. Assessment of service elements by country (deviation from average, average=0.0)



Values according to the main and sub-dimensions detailed in Table 1.

AUT: Austrian, CHN: Chinese, GBR: British, GER: German HUN: Hungarian passengers.

Source: Authors

In terms of gender, females clearly have higher expectations than do males for airlines. Only in one area, the importance of the visual appearance of flight attendants, did they rate items in this group lower than did males.

As regards income, the upper and middle categories have almost identical (average) expectations, while those with the lowest incomes are satisfied with a significantly more modest choice of content. No observable differences were found between respondents in terms of motivation to travel.

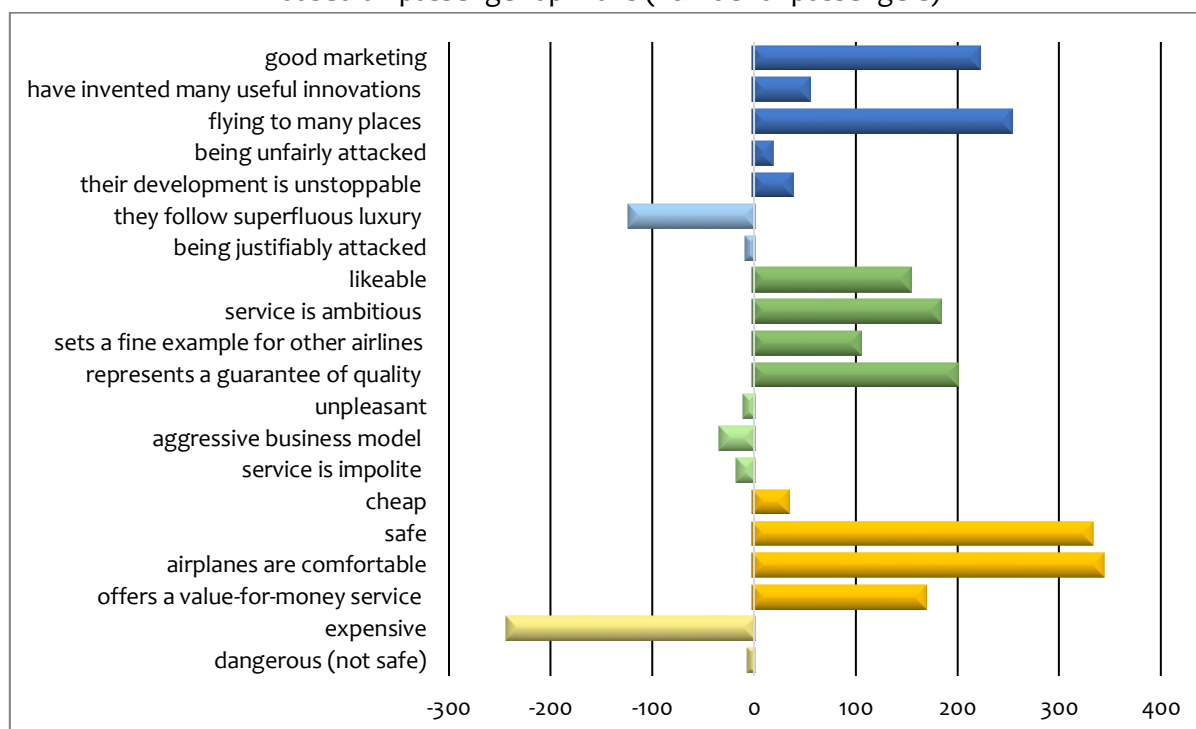
Ranking the means of responses to flight expectations in descending order, flight safety and interaction are higher: respondents consider these aspects to be more important. At the same time, the responses are also more consistent, as evidenced by the lower variance and relative dispersion of responses. For the other flight-related factors (food, global connectivity, entertainment), the lower level of respondents' expectations is associated with a higher dispersion and relative dispersion. The responses here are less concentrated and uniform.

4.2 Second main group

In the second main group, we looked at the effectiveness of the connection between identity and image, as all airlines strive to ensure that the values they build are recognised by the travelling public.

The simple statements made in the questionnaire carry the external (visible) and internal (emotional, mental) content that distinguishes the three airlines studied in the global system. Their self-image, in all forums and in all forms, suggests that if one chooses them, one will be able to travel to (almost) anywhere in the world, receive the highest quality of service, communicate with the most competent customer service, be at the forefront of innovative developments, have access to cutting-edge technology and safety, and do so at a lower price than their competitors. The passenger can experience a (brand) personality that gives the air travel experience a dimension that is hard to imagine.

Figure 4. Assessment of Emirates, Etihad, and Qatar Airways, ranging from positive to negative, based on passenger opinions (number of passengers)



Blue: Attribute, Green: Attitude, Yellow: Pros and Cons.

Vertical: The pre-formulated statements for the three airlines.

Horizontal: Number of respondents who marked the given statement for the airlines (persons).

Negative statements are represented as negative values to enhance the visibility of the representation. Source: Authors

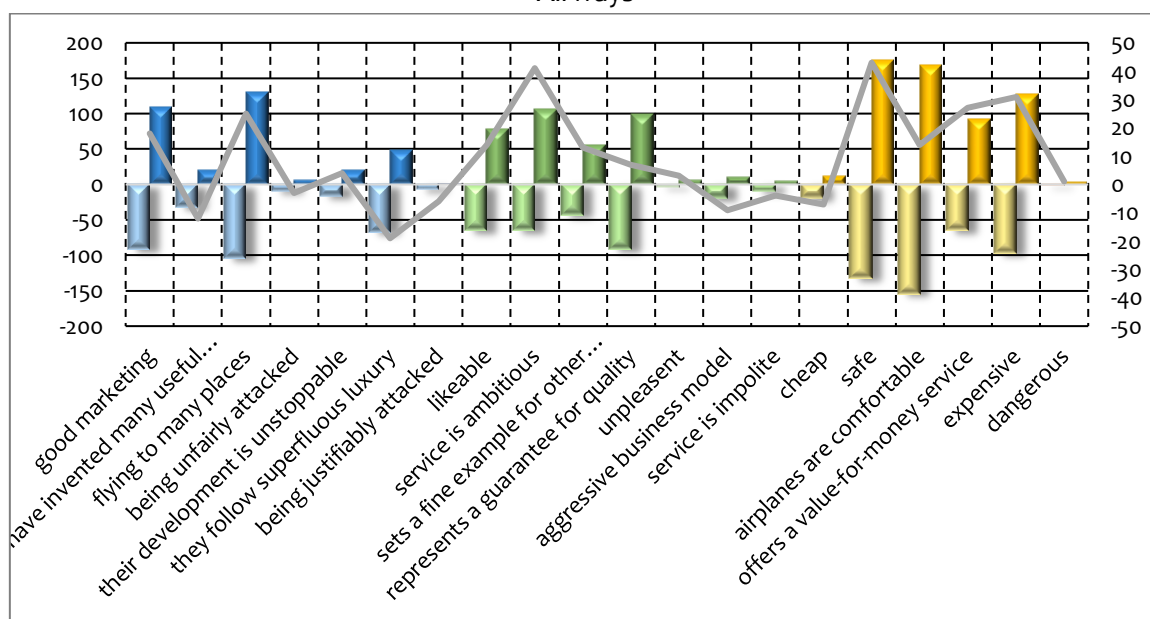
Based on the responses with positive and negative attributes, 83% of respondents (2,097 responses) gave a positive assessment of their activities. Successful marketing, an extensive network of routes, likeability, exclusivity, guarantees, safety, and comfort were confirmed in concrete terms. These characteristics are exactly what airlines like to hear.

The findings are presented in terms of their positive and/or negative content, with a positive and a negative range (Figure 4). Two marked findings in the negative range should be highlighted. One, which was perceived by the passengers as fundamentally different: price. Although the three airlines in the study have different fare offerings, the high number of ‘Expensive’ responses clearly indicates that a levelling off between competing market players has begun.

The other sensitive point for the companies, a brand element that characterises an entire era, received a strong negative response. The statement ‘They offer unnecessary luxury’ was confirmed by a third of passengers, indicating that they could not (perhaps did not want to) deal with the services and products offered. Of course, more in-depth research will be needed to draw further conclusions, but it is on this point that 123 (17%) negative opinions are a telling external picture (feedback).

The gender breakdown shows that males and females were mixed in their perception of company attributes, while the categories of staff attitudes and individually perceived advantages/disadvantages were clearly more strongly supported by females. It can also be seen that females were more likely to notice positive attitudes, while males were more likely to perceive negative attitudes (Figure 5).

Figure 5. Attributes, attitudes, and advantages and disadvantages perceived individually, distribution by gender: Opinions for the statements regarding Emirates, Etihad, and Qatar Airways



Blue: Attribute, Green: Attitude, Yellow: Pros and Cons.

Left axis: marking based on the p/713 questionnaire.

Right axis grey line: difference in number of male-female replies.

Female in positive range – Male in negative range.

Values examined according to the dimensions in Table 2.

Source: Authors

4.3 Third main group

In relation to the third main group, we see that a notable proportion of passengers did not give a response that is entirely in line with the concept of Emirates, Etihad, and Qatar Airways.

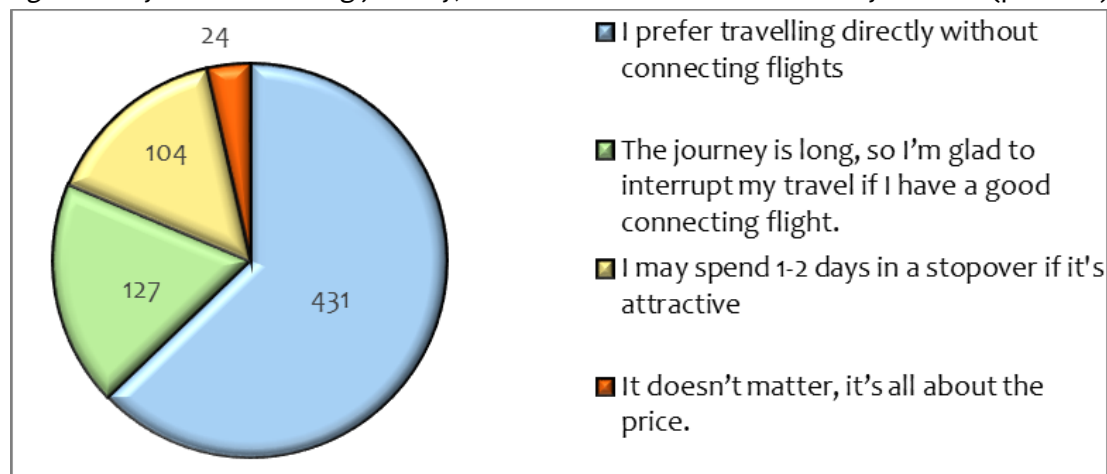
The main pillar of the business policy of the airlines examined is to build, develop, and integrate the hub system on the southern shores of the Persian Gulf into the world aviation system, which is a prerequisite for gaining influence in the air traffic sector between Europe and Asia.

By contrast, there are 80% more passengers who choose to fly direct, non-stop on long transcontinental journeys than the total of those who choose the other options (Figure 6). Of particular note is the low representation of price in this context (3.5%), which does not vary significantly by income category. Good connections are not a real alternative, nor is the possibility of a good connection with quality content on favourable terms.

Our study analysed responses by gender, age, and income groups, but no observable differences were found in any of the categories, with all breakdowns favouring non-stop flights.

The airport (with its diverse roles) is also linked to the stopover, and passenger opinion is significantly divided. We know from our previous surveys that some passengers are afraid of moving around airports, while others like the hustle and bustle, take advantage of the facilities on offer and, in the case of some airports, see the technical and cultural offering as an opportunity for enjoyment.

Figure 6. If you are on a long journey, which of these statements suits you best? (persons)



Respondents could select only one answer, 686 respondents (see the last paragraph of section 3.1.2.). Source: Authors

Based on 1,139 opinions (one respondent could mark more than one answer), it is clear that airports are predominantly seen by passengers as a place to land, take off, transfer (40%), and (generally) provide a reliable environment for transit passengers through the availability of wi-fi (27%). Fewer passengers require a choice of restaurants (17%), even

fewer do shopping (10%), with a negligible number of passengers who also consider airport entertainment and recreation (6%). Again, the results were compared with the demographic groups available to us, but no marked differences were found. From the point of view of passengers who have already experienced Emirates, Etihad, and Qatar Airways flights, the quality of the responses (order, proportion, strength, distribution) shows little or no difference.

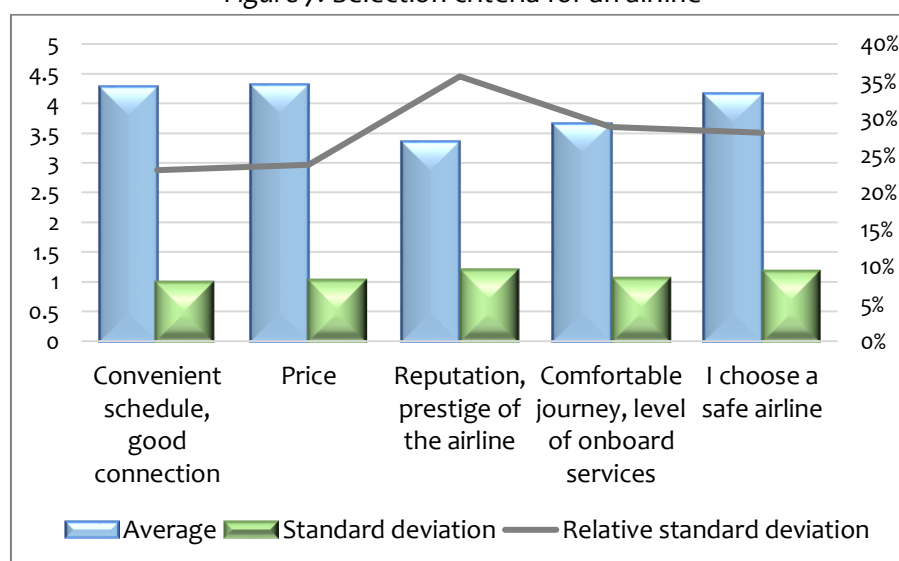
4.4 Fourth main group

Related to the fourth main group, the most sensitive philosophical fight in the area of business policy is about the alignment of ‘passenger consciousness’. The Gulf airlines, particularly Emirates, want to see the investment they have pumped into the system over the last two decades culminate in a transformation of consciousness that will place air travel in a unique, personalised, and different dimension from the one it has had up to now. Specifically, this means reimagining the institution of air transport, shifting from the simple reality of transport towards a more complex system of components in the areas of science, culture, art, and entertainment.

In this main group, we have therefore examined how passengers relate to this idea, how sympathetic they are to the method of engagement that has been tried for decades, and whether the prestige of airlines influences their ticket-buying habits. The answers to our questions on this issue were the least favourable for the airlines surveyed.

Price, convenient schedules, and safety are the most important factors when choosing an airline, with airline reputation and recognition ranking last. Again, the value of the standard deviations and relative standard deviations indicate that the lower average was associated with a higher standard deviation and relative standard deviation. In other words, responses showed greater uncertainty when assessing this aspect (Figure 7).

Figure 7. Selection criteria for an airline



Range from 1 to 5. Left axis: Importance from 1 to 5. Right axis: Relative standard deviation of replies (%). Source: Authors

Emirates (but also, it seems, Qatar Airways and Etihad) is not hiding its ambition to become a lifestyle brand, but this is where we see a major contradiction in the way these airlines communicate.

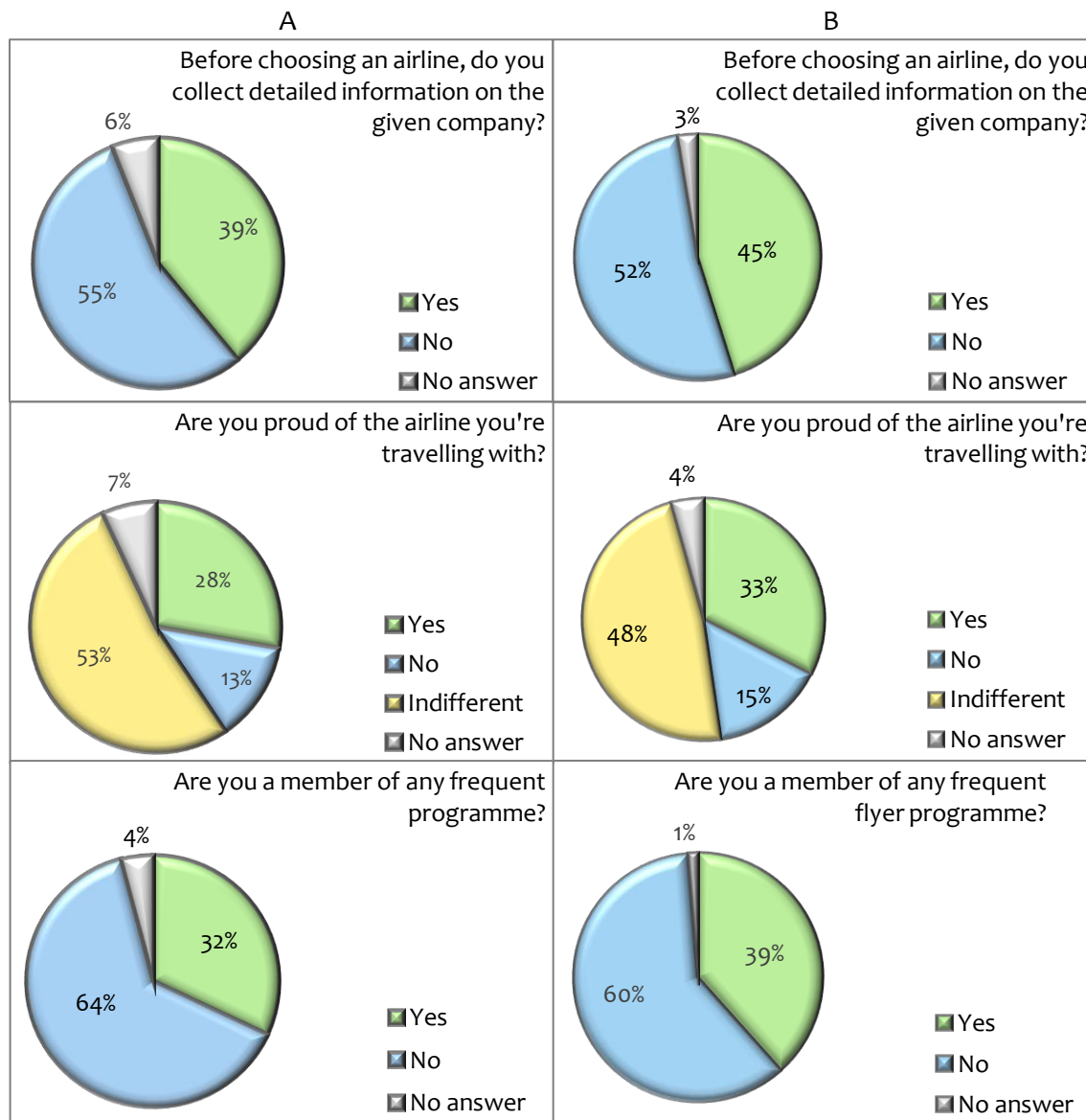
However, our survey provides less evidence of the level of engagement and behaviour expected from passengers (*Figure 8*). The majority of respondents (52-55%) do not research airlines before their planned trip, and thus the airlines' reputation is of little interest to the majority. The expectation of information sharing based on continuous contact – helping to target the parameters needed to make a decision – seems to be less likely to be met.

There would also be an expectation of the individual taking pride in being a customer of the airline, in addition to being satisfied with a customer-friendly, safe airline with a track record of excellence. However, less than a third of passengers feel it is important to express this feeling.

The frequent-flyer scheme, designed to demonstrate customer commitment, offers dozens of discounts and benefits in addition to accruing miles. As it requires regular travel, which is not currently a reality for the masses, its popularity falls far short of the desired goals.

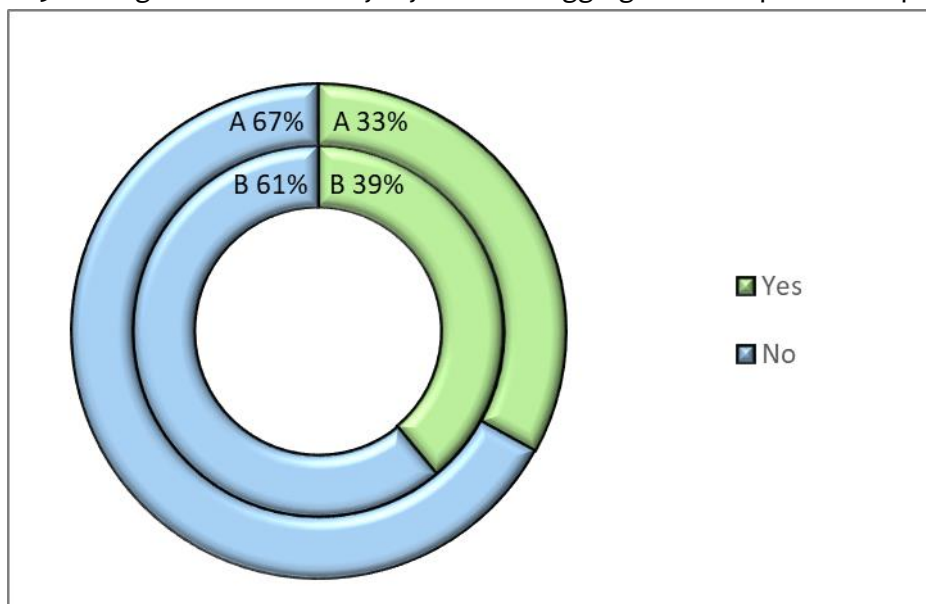
When looking at loyalty indicators only for passengers who have already used the services of the airlines under study, the picture is slightly more favourable, but these values do not reflect a state of unconditional loyalty (*Figure 9*).

Figure 8. Some typical indicators of passenger loyalty based on passenger opinions



A: The opinions of all respondents. B: The opinions of those who have already travelled with Emirates, Etihad, and Qatar Airways. Source: Authors

Figure 9. Strength of customer loyalty based on aggregate no. of positive responses



Outer ring (A): The opinions of all respondents (713 people).

Inner ring (B): The opinions of those who have already travelled with the airlines in question. Source: Authors

5. Conclusions

In summary, the significance of 80% of the service elements considered important by the three airlines was judged necessary or a major issue by the respondents. However, the classification of some elements (the existence of telephone communication, the choice of alcoholic beverages, printed press and publications) was far below the preferences set by the airlines, which could have a negative impact on their perception, that is, on their brand image (unnecessary luxury, expensive). Nevertheless, we feel that the cautious conclusion is correct according to which the development strategies implemented by Emirates, Etihad, and Qatar Airways in the field of in-flight services, with the exception of the examples mentioned, represent the expectations of the targeted and accessible passengers.

The responses also show that the brand image of the target audience is formulated and communicated more through the directly perceptible advantages and disadvantages, and less by attributes linked to the company (legal attacks, development trends), but not even the staff attitudes are the biggest inspiration for them.

It would provide a broader perspective on the judgement of the airports if the survey was not made only in European locations (as was the case here), but the positive messages, samples, and experiences from the most technically advanced units (e.g., Changi, Hamad Int., Dubai International, Incheon, Haneda) could also be shown. However, the standpoints in our case were based mainly on the reality of our continent, which includes the congestion experienced daily at airports, with the resulting difficulties in transferring passengers, crowded lounges, inadequate service, and dozens of delays. Taking this into account, the responses showed that passengers perceive the airport primarily as a

transport terminal, with no or extremely limited attractiveness in terms of the services offered. The vast majority of respondents prefer direct access, avoiding transfers, which represents a less favourable alternative for the Gulf airlines.

In the context of our study, we can also see that the majority of the passengers today still consider air travel more as a form of transport rather than a scene of other extensive services in a different direction. We were unable to identify any dependency on or attraction to the parameters of passenger loyalty that could be linked to the "lifestyle travel" rhetoric envisioned by the reference airlines. This finding was not significantly overturned by passengers who had experienced the airlines surveyed using their airports.

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