



The Emirates: Airline Company or a global lifestyle brand?

A dissertation submitted by

Natalya Mantur

to obtain Master's Degree in Management in Hospitality

Academic Supervisor: Cláudia Ribeiro de Almeida

School of Management, Hospitality and Tourism

University of the Algarve

2015

Declaration

I hereby declare that this thesis is my own work and presentation of my original research. Wherever contributions of others are involve, every effort is made to indicate this clearly, with due reference to the literature.

Natalya Mantur

Signature:.....

Copyright:

The copyright for this dissertation remains with me.

I agree that, should University wish to remain it for reference purposes, a copy of my dissertation may be held by University of the Algarve.

Abstract

The principal theme of dissertation is possibility of a lifestyle brand in airline industry. Airline industry is changing in terms of marketing strategies and brand communication. The main objective would be in understanding in a case of Emirates how an airline can become a lifestyle brand. For empirical research aim is to find traveler behavior towards an airline and true needs of customers while traveling by plane. The findings from case study show powerful brand orientation in Emirates Airline in two levels: external and internal. Results from primary data present the absence of link between airlines and customers. Recognition of airlines logo and uniforms are very low in general, opposite Emirates Airline, the most recognized brand between competitors. Results of present study conclude that Emirates airline is already strong brand, but not yet a lifestyle brand, because travelers rather see an airline as way of traveling than an important service during their journey.

Keywords: airline branding, lifestyle brand, internal branding, Emirates, cosmopolitan.

Acknowledgement

First of all, I would like to thank the University of the Algarve for giving me an opportunity to be part of Master Degree in Management in Hospitality.

I would like to appreciate support and help of my supervisor, Cláudia Ribeiro de Almeida, and for understanding difficulty of combining my job with studies.

Special thank I would like to address to Terry Daly and Saada Thurley for all your availability and ideas from different perspectives.

Finally, I would like to mention an opportunity to be part of Emirates cosmopolitan team and understand better from the inside “living the brand” community.

Contents

Declaration	ii
Abstract	iii
Acknowledgement.....	iv
Contents.....	v
List of Tables.....	vii
List of Figures	vii
List of Abbreviations.....	viii
Chapter 1 - Introduction	1
1.1 Introduction to the Research	1
1.2 Aim and Objective	1
1.3 Structure of the Research	1
Chapter 2 – Literature Review	3
2.1 Introduction	3
2.2 Airline Industry	3
2.3 Middle East Region.....	3
2.3.1 Growth of the region	3
2.3.2 Challenges of the region.....	4
2.3.3 UAE and Dubai	5
2.4 Open Skies	6
2.5 Full-Service Carriers	7
2.6 Market segmentation.....	7
2.7 Branding.....	8
2.7.1 General Concept.....	8
2.7.2 Airline Branding.....	10
2.7.3 Internal Branding.....	10
Chapter 3 - CASE STUDY	12
3.1 Introduction	12
3.2 Brief history of Emirates	12
3.2.1 Birth of an Airline:	12
3.2.2 Emirates during 11 of September:.....	13
3.3 Emirates nowadays.....	13
3.3.1 Emirates fleet.....	13
3.3.2 Luxurious Service	14

3.3.3 Emirates in the World	19
3.3.4 Threats from other Airlines	20
3.4 Airline Brand.....	21
3.5.1 Brands Emirates working with.....	24
3.5.2 Hello Tomorrow.....	25
3.6 Internal marketing.....	25
3.6.1 Who are the Emirates Cabin Crew?	25
3.6.2 Emblematic Uniform.....	25
3.6.3 Inspiring Training.....	27
3.6.4 Caring, Inspiring and Cosmopolitan	27
3.7 PESTE Analysis	29
3.8 SWOT	31
3.9 Customer’s feedback.....	32
3.10 Vision for the future	33
Chapter 4 – Methodology.....	35
4.1 Research methods.....	35
4.2 Research question and Hypothesis.....	36
4.3 Quantitative method	36
4.4 Questionnaire design.....	37
4.5 Airlines of the research	38
4.5 Data Collection.....	40
4.6 Limitations of the Research.....	40
Chapter 5 – Main findings.....	42
5.1 Response rate	42
5.2 Hypothesis 1:.....	44
5.3 Hypothesis 2.....	46
5.4 Hypothesis 3.....	47
5.5 Conclusion.....	48
Chapter 6 – Conclusion.....	49
References	51
Appendix I: Questionnaire	55
Appendix II: Additional figures	60
Appendix III: Product Positioning Campaigns	61

List of Tables

Table 1 Agreements UAE.....	6
Table 2 Scheduled Passengers Carried (International) Source: IATA, WATS 58 th edition	19
Table 3 Passengers - Kilometers Flown. IATA, WATS 58 th edition	20
Table 4 Top 10 Airlines Brands. Source: Brand Finance.....	22
Table 5 PESTE analysis	30
Table 6 SWOT analysis.....	31
Table 7 Personal Information	42
Table 8 Aspects of flight	46

List of Figures

Figure 1 World Map, Middle East. Source: http://www.worldatlas.com	3
Figure 2 Brand assets, strength and value	9
Figure 3 Brand building (Piehler, Hanisch & Brumann, 2015)	11
Figure 4 Emirates fleet	14
Figure 5 EK System. Source: Corporate communication department	23
Figure 6 Emirates Vision. Source: Corporate Communication Department.....	33
Figure 7 Type of research.....	35
Figure 8 Nationalities	43
Figure 9 Area of Occupation	43
Figure 10 Reason.....	44
Figure 11 Frequent Flyer Program	45
Figure 12 Ticket Reservation	45
Figure 13 Airline recognition	47

List of Abbreviations

ACI	Airport Council International
ATC	Air Traffic Control
DXB	Dubai International Airport
EK	Emirates Airline
FFP	Frequent Flyer Program
FSC	Full-Service Carrier
GCAA	General Civil Aviation Authority
GCC	Gulf Cooperation Council
IATA	International Air Transport Association
ICAO	International Aviation Organization
LHR	London Heathrow Airport
UAE	United Arab Emirates
ULR	Ultra long-haul flight

“Learning the secret of flight from a bird was a good deal like learning the secret of magic from magician.”

Orville Wright.

“The secret of flight in the 21st century is not just to fly, but to offer the highest possible level of care for passengers, maintain a modern fleet and, if possible, to make profit.”

Mohammed bin Rashid al Maktoum.

Chapter 1 - Introduction

1.1 Introduction to the Research

The aim of this chapter is to present the Research reason, to figure the Research aim and objective, and to describe the structure of present dissertation.

Nowadays marketing in hospitality has been changing, because of competitive markets. It is turning relevant to take an action that goes beyond customers' expectations and creates emotional relation between customer and company. Creation of the brand with values it is a link that has been missing in hospitality industry.

1.2 Aim and Objective

The aim of the research is to understand if an airline can become a lifestyle brand. Emirates has been chosen as a company of a case study. The reason of the choice is that EK airline has a strong marketing strategies and the researcher is an employee of the company that gives a better picture and opinion from the inside.

The main question of the research is if Emirates airline is ready to become a lifestyle brand and if travelers see an airline more than way of transport. In order to reach the objective the plan presented below will be followed:

- Conduct the research about airline industry, Middle East region, branding and airline branding to better understand the area is being studied.
- Look deeply into Emirates airline services and marketing strategies.
- Understand behavior travelers towards an airline.
- Analyze the level of recognition of Emirates brand on international level.

1.3 Structure of the Research

The plan of the present dissertation is divided into six chapters. The content of each chapter is described shortly below:

Chapter 1 – Introduction.

The present chapter explains the reason for the research in the area of airline branding. It describes as well what researcher is looking for in revealing the main question of the study. It shows brief structure of dissertation.

Chapter 2 – Literature Review.

The second chapter is serving as a base for this thesis. This part consists of concepts, which are important to understand the topic. It is relevant for any research to have references from authors and different opinion already existing in the same topic.

Chapter 3 – Case Study.

The third chapter studies a phenomenon of airline branding on a case of Emirates Airline. In this section will be described some general information about EK, such as brief history, company nowadays, aircrafts of use, services. Then the marketing strategies will be seen in two perspectives: external and internal. To conclude a case study, it will be shown the vision of the company in terms of becoming a lifestyle brand.

Chapter 4 – Methodology.

The fourth chapter serves to describe the method that was used for the research. This section explains the reason of the method in use and represent in detail arguments about each question in the questionnaire, how it was conduct and the limitation of the research.

Chapter 5 – Main finding.

The fifth chapter shows the results of the questionnaire and reject or confirm hypothesis of the study.

Chapter 6 – Conclusion.

In the last chapter it is made the final conclusion of whole study. It will be combined the results of the case study and questionnaire to respond the main question of the research.

Chapter 2 – Literature Review

2.1 Introduction

The target of first chapter is to identify which is the industry of company of the case study and environment of region. The relevance of this chapter is to understand what branding means in the airline industry and it is serving as well as a base for the following research.

2.2 Airline Industry

The global airline industry has a powerful influence on a global economic. It is not only providing a service to every country in the world, but also impacting on other industries, like aircraft manufacturing and tourism (Belobaba, Odoni & Barnhart, 2009). It cannot be denied the importance of an industry that affects tourism, trade and investment.

As per Holloway (2008) *“Airlines have annual revenues of approximately half a trillion dollars and employ over 2 million people. They directly support another 2.9 million jobs at airports and civil aerospace manufacturers, and may indirectly support in excess of 15 million jobs in tourism (Air transport Action Group 2005).”*

2.3 Middle East Region

2.3.1 Growth of the region

Middle East is located between Asia, Africa and Europe, just eight-hour away from the Gulf, allowing regional airlines offer one-stop service between many city pairs (Boeing, 2015).



Figure 1 World Map, Middle East. Source: <http://www.worldatlas.com>

Middle East is composed by Bahrain, Iraq, Jordan, Kuwait, Lebanon, Palestine, Oman, Qatar, Saudi Arabia, Syria, the United Arab Emirates, Yemen and Israel. GCC (Gulf Cooperation Council), known as engine of the Middle East consists of six countries: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and the United Arab Emirates. Beside of wares and political situations, the Middle East region is leading in the world in growth and prosperity in terms of air transport (Graham, Papatheodorou & Forsyth 2008).

Only 35 years ago, aviation sector used to be limited in the global point of view in Middle East region. European and Asian carriers used to see Bahrain, Dubai and Muscat, as technical stops to refuel on long-haul flights between continents. The flag carriers were the only business model and mostly were the symbol of state prestige (Strickland, 2015).

Nowadays, the situation is completely different. CAPA (Center for Aviation) in their annual reports “World Aviation Yearbook 2013, Middle East” affirm that in 2012 the leader in growth rates for international passenger and cargo traffic is Middle East and in 2013 it was expected to be a leader again.

Three biggest hubs in Middle East: Dubai, Doha and Abu Dhabi, had registered 93 million passengers in 2012, it means more 35 million than the last year, the growth of just under 60%. The increase of traffic is due to three state-owned but commercially focused airlines: Emirates, Qatar Airways and Etihad Airways. (CAPA, 2013) *“These carriers offer all of the comfort that the world elite carriers provide and operate to dozens of important world destination from their hubs”* (Belobaba, Odoni & Barnhart 2009).

2.3.2 Challenges of the region

Despite the growth, some areas can be improved and developed, comparing to North America or Europe. Examples are: loads factors on inter-regional flights remain low and almost absence of secondary airports, which could be supportive for the low-cost carriers (CAPA, 2013).

Even the overall aviation system – airports, airlines, air traffic control - has to adapt quickly – for growth, because in 20 years region expect to receive more than four times the passengers compering to current situation (Ringneck, Majdalani & Ismail, 2008).

Another challenge might be the fact of numerous airspaces that remain under military control, decreasing the airspace for commercial traffic. As well as the systems of air traffic control are not enough developed and are not centralized. The countries of GCC and their neighbors have been progressing in discussions of needs of ATC coordination (Boeing, 2015).

2.3.3 UAE and Dubai

As per Belobaba, Odoni & Barnhart (2009) Middle East, as well as India, China, Africa is the emerging market, where the importance of developing aviation infrastructure is high due to growth of passenger and air cargo traffic.

The United Arab Emirates is trying to adapt the growing of air traffic and emerging necessities. In 1996 the GCAA (The General Civil Aviation Authority) were created in UAE to regulate Civil Aviation. Since then, to adapt a growth and to provide a better service, the air traffic control center program, Radar equipment's and facilities has been renewed (GCCA, 2015).

Dubai ruler, Sheikh Rashid, had established the airport in despite of political and economic situations and it was inaugurated on September 30, 1960. Gulf Air was the first one to use Dubai airport, after the visitors became Kuwait Airways and BOAC (British Overseas Airways Corp). Sheikh Rashid's Open Skies policy started to cause an impact on the industry by receiving 42 airlines by 1984. The data shows that each week around 150 aircraft took off from Dubai and 500,000 passengers flowed through the facility (Wilson, 2007).

Nowadays, Dubai can be considerate the largest hub in the Middle East region with predominantly international traffic. In 2012, DXB was considerate the third largest hub in the world by international passengers, with increase of traffic from 34.5 million in 2008 to 57.7 million in 2012 (CAPA, 2013).

Airport Council International (ACI) in the latest edition of the World Airport Traffic Report declares that Dubai is the largest international airport in the world in 2014, even with the closure of one runway. It is as well the sixth-busiest airport in terms of overall passenger traffic but the world's busiest in terms of international passenger traffic, passing now London Heathrow airport (LHR) (CAPA, 2015).

2.4 Open Skies

In terms of passenger air traffic, Middle East and Dubai are mostly receiving international passengers or serving as one-stop hub between continents. It couldn't be possible without open skies policies and international agreements.

Doganis (2001) affirms that the policies of the “open skies” will be transformed and completed in the early years of the 21st century, believing that it would change airline industry from highly protected to more competitive and open.

In 1944 at the Chicago Convention, it was discussed some forms of agreements and it was created the International Aviation Organization (ICAO). ICAO was established to control technical and operational standards (Cento, 2009).

Safety; air navigation capacity and efficiency; security and facilitation; economic development; and environmental protection, have become the new strategies for ICAO (Abeyratne, 2013).

In March 2002, government of the UAE signed agreement with US about the Open Skies policy, which will allow the possibility of domestic airlines of both countries to fly to each other's countries. This agreement covers passengers and cargo services and excludes restrictions of frequencies of the flights, types of the aircrafts and the prices (Carvalho, 2002).

In 2010, UAE could count already with more than 60 agreements in Latin America, Africa and Europe (Abeyratne, 2013).

As per data of ICAO in the United Arab Emirates, the number of “open skies” agreements has been increasing from 65 in 2011 to 79 in 2012. To date UAE has Open Skies agreements with 122 countries, the second highest number after US (ICAO, 2012).

Type of Agreement	2011	2012
Open Skies	65	79
Liberal	37	43
Restrictive	43	36
Total	145	158

Table 1 Agreements UAE

Despite of the example of UAE, especially Dubai the rest of Middle East remains all aviation system restricted by regulation of governments and airlines, when in Europe and Asia approximately 50% airlines are private (Ringbeck, Majdalani & Ismail, 2008).

2.5 Full-Service Carriers

Cento (2009) defines three main models of the airline business: Full-Service carrier (FSC), Low-Cost carrier and Charter carrier. The carrier of the case study and present research is a Full-Service carrier and this model will be seen in more details.

In the world FSC can be classified as dominating, even in the list of top 100 airlines, two-third are full-service airlines (Hanlon, 2007). They were created in 1944 by government as model of an international airline industry of national carrier. In fact, nowadays they still providing the higher in-flight service, but they are not that fast growing as low-cost carrier (Graham, Papatheodorou & Forsyth, 2008).

Full service airlines have as most coverage as possible in terms of network to increase destinations of the hub. They try to cover all markets: national and international with all flights: short, medium and long-haul. Services and products offered try to adjust all possible markets; yield management and pricing became elaborate to increase revenue. Almost all of FSC have loyalty programs – frequent flyer programs, to enhance relation with customer and differentiate between other airlines (Cento, 2009).

2.6 Market segmentation

Market segmentation is relevant for airlines, either in passenger or cargo business, to identify segments they want to target, their characteristics, necessary products and importance of each segment in terms of profit (Doganis, 2006). Passenger segment has been studied in present research and will be looked deeply on this topic.

In air passenger market the division of segments would be usually based on three factors: reason of travel, length of journey and country of origin (Shaw, 2011).

Segmentation in terms of purpose is normally based on leisure and business markets (Shaw, 2011). But also have some segments that cannot be classified in any of them and which are very frequent in the region is being studied.

In the Middle East one of popular purpose of travel on specific dates is religious, visiting Mecca during Ramadan and Haj. It is very important for Muslim customers and requires extra flight to/from Jeddah and Medina in Saudi Arabia.

Other important segment appeared due to population migration in the Middle East that will maintain strong link between two communities.

In terms of length of journey, customers will be looking for different aspects to make a trip more comfortable or easy. In short flight ease of airport services would be much more appreciated, when during long-haul routes in-flight services are the most important on a journey (Shaw, 2011).

In considering culture of travelers would provide the possibility of becoming a global brand, the important feature of marketing in airline industry (Shaw, 2011). Importance in-flight catering, languages spoken by cabin crew, baggage allowance would influence travelers from different countries in different way.

Belobaba, Odoni & Barnhart (2009) sees a market segmentation only based on offered classes to travel: first, business and economy classes. Dividing customers on different segments by classes will define the quality of offered products and price of journey.

All airlines have their own way to study their market, but the objective will be always the same – identify the most profitable markets, establish marketing strategies and pricing policies. It would require frequent market research and survey research to identify needs of customers. Analysis would give a possibility to adjust products to each market, offer better services than competitors and fulfill effective branding (Doganis, 2006).

2.7 Branding

2.7.1 General Concept

Shaw (2011) recognizes that it is important to see difference between Brand and ‘Commodities’. For marketing point of view, ‘Commodity’ status of a company it is a problem because customers don’t have a preference in their choices and easily will go for a product with better price or discount. At other hand, powerful brands will always win in terms of loyalty of their customers.

For building a brand it is necessary to push the marketing to new limits. The secret of a building a company image is to combine market segmentation with deep analysis about what customers real needs are and recognition of a brand identity. After analyzing segments, the effective building of brand values would be based on what customers need (Aufreiter, Elzinga & Gordon, 2003).

In competitive markets full of services and products, the important accent is towards customers' experiences, the creation of emotional charge give a possibility to win a place in heads and hearts of customers (Welsing, 2006).

Brand can be divided by tangible differentiators and psychological values. First ones would be defined by product that a company offers and the second values are related to how customer feels when buying a product. The simple example of psychological brand values would be BMW car: when a customer buys a car of that brand, it would transmit the sign of success (Shaw, 2011).

Strong and powerful brand will only benefit a company in providing more loyal customers and firm position in a market. Kapferer (2008) shows how brand assets, brand strength and brand values can be connected in Figure 2.

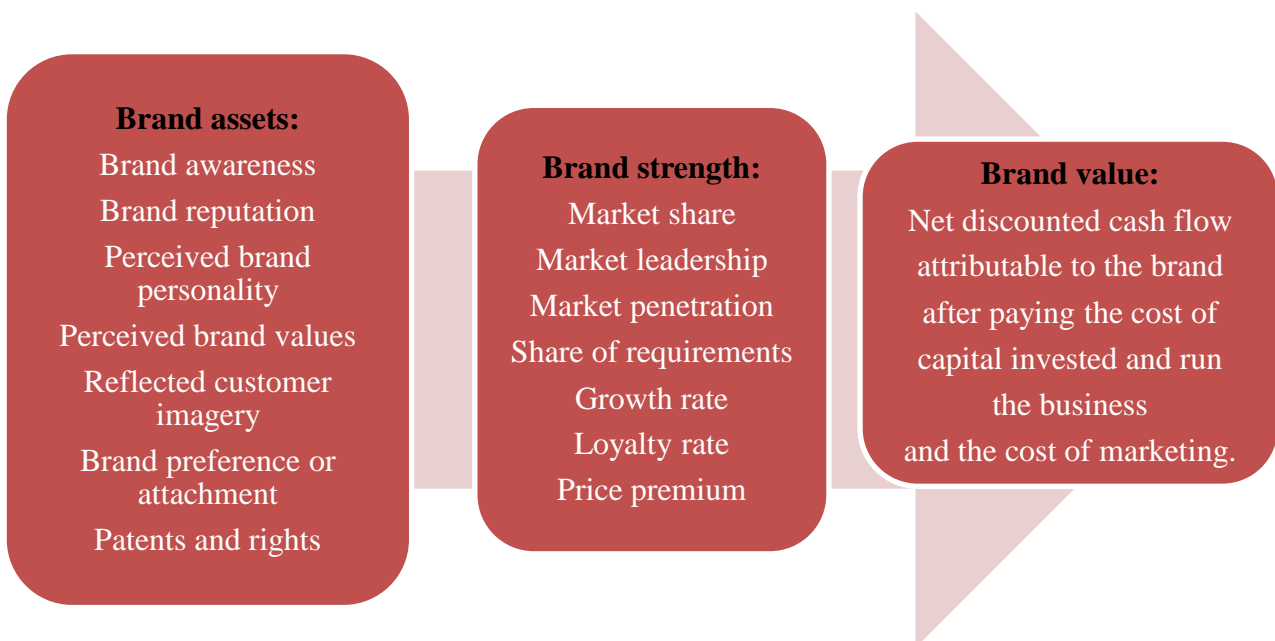


Figure 2 Brand assets, strength and value

2.7.2 Airline Branding

“Nowadays, branding increasing from all corners, airlines have to find a new way to adapt or die. Profiting from a lifestyle association with their passengers and building that brand loyalty could well be the missing link in airline evolution. Survival of the fittest isn’t just a Nike thing” (Garcia, 2014).

Branding in airline industry is increasing attention in marketing strategies, that will allow add value to the product and increase the control of distribution channels (Shaw, 2011).

Hanlon (2007) calls a concept of airline branding as “nebulous” concept, but it is becoming important part for a successful airline. Author believes that an airline has ‘hard’ and ‘soft’ values, and beyond those, there are brand values, which will distinguish an airline from others with ‘personality’.

While choosing a brand strategy, as airline has to choose values that would position their brand. It must to be a mix of tangible and psychological brand values to make a brand complete, strong and defensible (Shaw, 2011).

After setting up all values an airline has to maintain the same standards and to deliver promises, it would make an airline trustworthy and build a relation with a customer (Shaw, 2011).

2.7.3 Internal Branding

Many companies concentrate on external marketing and branding, but they forget that the real ambassadors for the brand are their employees.

“Internal branding, or ‘living the brand’, is about the translation of (external) brand values to (internal) organizational values” (Welsing, 2006). Welsing (2006) believes that it is relevant that behavior of employees fits in brand values that company tries to transmit to the customers. The concept of ‘living the brand’ can be found in service companies where products are contained in the employees.

Internal branding has to start with helping employees in learning how to live the brand. It will create corporate culture and will take employees to top-level business (Giehl & LePla, 2012).

In the Figure 3 it is possible to observe a summary from article “Internal Branding – Relevance, Management and Challenges”, authors Piehler, Hanisch & Brumann. The figure below shows the relevance of brand building in external and internal level. It starts with tools, which include brand communication - external and internal; brand orientated leadership and HR-management. Employee skills with organizational support will lead to brand understanding, commitment and citizenship behavior. Benefits of all effort together would fulfil promise that will result in Satisfaction, Trust, Loyalty and Equity.



Figure 3 Brand building (Piehler, Hanisch & Brumann, 2015)

Chapter 3 - CASE STUDY

3.1 Introduction

The aim of this chapter is to figure out what are the values is trying to build Emirates as an airline and what strategies is using for achieving the goal. The objective of previous chapter was to understand what industry is been studied and how it is possible to create a brand in that industry. *“A case study involves the study of an example – a case – of the phenomenon being researched. The aim is to seek to understand the phenomenon by studying single examples.”* (Veal, 2006).

3.2 Brief history of Emirates

3.2.1 Birth of an Airline:

Emirates was created in 1985 with two wet-leased aircrafts from Pakistan International Airline and check of \$10 million. First flight was operating to Karachi on 25th of October and already in 1987 the first bought aircraft was delivered to Dubai. (Emirates, 2015) In 1990 despite the political situation and; Iraqi and Kuwait conflict, Emirates continues with growths (Wilson, 2007).

Only after six years of operation Emirates flies to 23 destinations and has plans to grow even more. In 1992 Emirates were the first airline to install screens with inflight entertainments in all classes and that was the year, when EK exclusive terminal was opened. In 1996 they open the Flight Center for their staff. The important step in terms of marketing and loyalty programs – frequent flyer program – was launched in 2000 (Emirates, 2015).

Since the beginning of setting a new airline, the management had a strong orientation for exceptional service and quality. Even the ambition since the first year was to become the best Airline in the Middle East and then in the World (Wilson, 2007).

The small example about number of cabin crew to take care of customers, the industry standards are 50 passengers for 1 crew in economy class, 15 to 1 in business class and 7 passengers per each crew in first class. Emirates set up other standards for them: which are 40 to 1, 10 to 1 and 4 to 1 (Wilson, 2007).

Even the first team was international and outstanding with British, Indian and Pakistani nationalities; some of employees are still part of the team nowadays (Wilson, 2007).

3.2.2 Emirates during 11 of September:

11th of September of 2001 is a world known terrorist attack in airline industry, when one aircraft of American Airlines and one of United Airlines were hijacked and crashed on the Twin Towers in New York City (Cento, 2009).

After the incident of 11th of September 2001 William Gaillard of the industry's international organization affirmed that, "the airlines lost last year as much as they had ever made since the Wright Brothers started flying in 1903." (BBC, 2002)

In 2000 the industry was reported to have made \$3.7 billion profit worldwide. The events of 2001 propelled it to a \$12 billion lost (Wilson, 2007).

Opposite of other airlines, Emirates had many aircrafts on order and many plans. Sheikh Ahmed declared: "We will maintain our plan to take delivery of 11 aircraft in 2002 ... This is time for us all to pull together and prove that we really are the most unique travel team in the world" (Wilson, 2007).

Despite all fears of Sheikh Ahmed, it took only six weeks to recover the business. The shocking news became the \$15 billion aircraft order sent to Boeing and Airbus, which counts in total some 58 new aircrafts. In ordering new A380, it made Emirates the first airline to commit the A380 program (Wilson, 2007).

In the conclusion, after the tragedy of 11th of September, global passenger traffic declined by 4% and cargo by 9%. For Emirates, the situation was opposite: with the rise of passenger traffic by 18.5% and cargo by 19.5% (Wilson, 2007).

3.3 Emirates nowadays

3.3.1 Emirates fleet

Emirates airline is known with their modern fleet, luxurious designs in premium cabin, beautiful lounges and modern shower spa's on board.

In June 2015, EK fleet counted 235 aircraft made up of 221 passenger aircraft and 14 cargo aircraft. They are counting with 145 Boeing 777 (world's largest operator of this

aircraft); 62 Airbus 380 (as well, world's largest operator of the biggest passenger aircraft); 5 Airbus 340; 21 Airbus 330 and 2 Boeing 747.



Figure 4 Emirates fleet

3.3.2 Luxurious Service

On board of an Emirates flights customers can choose in flying First, Business and Economy classes.

“Inspire the Inspired”

For the customer flying in **First Class** cabin, Emirates prepared the own private suits. There passengers can enjoy seats that convert to fully flat bed with mattress and blankets.



Image 1 First Class Suit

Availability of selection of wines and champagnes in First Class are impressive and for the ones who don't want to be disturbed can enjoy personal mini-bar inside a suit. On demand in-flight dining has a variety from wild Iranian caviar to gourmet cheeseboard for the desert.

On airbus 380 first class customers can have an experience of using facilities of the Shower Spa at 40,000 ft. It has to be mentioned availability of amenities with Bvlgari toiletries and Timeless spa products.



Image 2 A380 shower spa

“Ignite new passions”

Passengers traveling in **Business class** will enjoy flat-bed seats with available mattresses and blankets to arrive refreshed to the next destination. Side table and in-seat power are suitable for the ones who are traveling in work. For the ones who want to enjoy a leisure trip, the mini-bar and award-winning entertainment are available on board.



Image 3 Business Class Seats

In all A380 First class and Business class customers can enjoy onboard lounge at 40,000 ft. Lounge will offer a possibility of stretching legs, enjoy a selection of canapés and large selection of cocktails, wines, champagnes, beers, spirits and many more drinks.



Image 4 A380 lounge

“Expect Exceptional”

In **Economy class** cabins it is not that private experience than in First or Business, but availability of comfortable seats, in-seat power, Wi-Fi, in-flight entertainment will be making journey unforgettable. For the little ones the offer of special meals, toys, cartoon and Polaroid picture with take away fear of flying.



Image 5 Economy Class Cabin

Inflight Entertainment

In 2015 and already for 11th consecutive year Emirates gets award of “World’s Best Airline Inflight Entertainment” at SKYTRAX World Airline Awards.

Emirates and Singapore airlines were considered the first airlines implementing “inflight entertainment”. Consumers continue to think well of a pioneer that took the risk and made the investment – concept of so called “First Mover advantage”. (Shaw, 2011) Having a pioneering vision in technology, Emirates was the first airline in launching personal TV screens for all customers in all cabins in 1992, Live TV in 2013 and free Wi-Fi in 2014.

Figure X it is an example of campaign to promote ICE (Information, Communication and Entertainment) system. With up to 1.800 channels of movies, music, television, games and more, ICE will take customers to emotional side, coming face-to-face with characters and scenarios.



Image 6 ICE advertisement

Dubai – Terminal 3

Terminal 3 in Dubai International Airport (DXB) is exclusive terminal for Emirates Airline. First Class and Business Class customers have a different access to terminal and check-in area dedicated only for premium class cabins.

For the connecting passengers, terminal has variety of shopping outlets, cafes and international restaurants to make a stop-over experience more pleasant. Availability of Spas helps customers reach a destination more relaxed and de-stressed. And for travelers who doesn't have any appointment in Timeless Spa, two Zen gardens will help to create a calm atmosphere in the middle of busy airport environment.

Emirates experience it is not only on-flight service, it starts much earlier, when in exclusive terminal passengers doesn't need to worry about check-in counters (all of them would be EK) and comfort while waiting for a flight.

Lounges

Lounges are designated for making experience of Premium class customer more unforgettable and unique.

First Class lounges have everything for needs of every customer. For the ones who are not tired and would love to enjoy a good food, lounge is offering fine dining experience with dishes from all over the world, great wine selection with suggestion of expert sommelier and Cigar Bar. If passenger is tired, quite rooms with chaise longues, blankets and pillows would be perfect solution. And nothing better to take a shower in shower spa before next connection, even if running out of time, boarding is directly from lounges.

For customers travelling in **Business Class** complimentary Wi-Fi will help to stay connected while waiting for the next flight. Different areas, including quiet area will make feel each passenger like home. Availability of gourmet dining options and bars offer opportunity to meet people from all over the world. The fact that boarding is straight from the lounge will save some time to enjoy more Emirates lounges.

Lounges are available not only in Dubai, customers can enjoy as well Emirates lounges in 35 destinations and partner lounges in more than 60 airports.

Chauffeur-Drive

Chauffeur-Drive it is a complimentary service available for passenger traveling in First and Business classes, available in Dubai and in over 70 destinations. Only with 48 hours prior a flight a customer has an opportunity to book a car to and from airport, which can take to any place in the city: hotel, meeting, restaurant or even golf course.

3.3.3 Emirates in the World

After only 30 years in service and only second year of losses in terms of finance, it is important to see how Emirates positions in the world.

As per data of IATA, WATS 58th edition in terms of passengers carried, EK is on 4th position, where Ryanair is on the first, leading Emirates in 87.8%. On the third position is Lufthansa and it is passing only in 17.1%. After observing the table, it is relevant to notice a big difference between Ryanair (81,395) and the second position – EasyJet (52,787). Even with that big gap in the first 2 positions, the first two airlines are low-cost airlines.

Rank	Airline	Thousands
1.	Ryanair	81,395
2.	EasyJet	52,787
3.	Lufthansa	50,739
4.	Emirates	43,335
5.	British Airways	33,803
6.	Air France	33,118
7.	Turkish Airline	27,407
8.	KLM	26,581
9.	United Airlines	25,002
10.	Delta Air lines	23,086

Table 2 Scheduled Passengers Carried (International) Source: IATA, WATS 58th edition

The second table from IATA shows “Passengers – Kilometers Flown”. Emirates is leading in this table with 209,377 million, it is 48% more than the second position – United Airlines. It can be explained with numerous ULR flights to Australia, North and South America, and operating fleet with capacities of 256 passengers on Boeing 777-200, 354 passenger on Boeing 777-300 and 490 on Airbus 380. It cannot be ignored the

news about the longest flight to Panama starting from 1st of February 2016: 17 hours and 35 minutes, approximately 13,800 kilometers, 256 passengers on the Boeing 777-200 (Thompson, 2015).

Rank	Airline	Millions
1.	Emirates	209,377
2.	United Airlines	141,364
3.	Lufthansa	139,098
4.	Delta Air lines	128,143
5.	Air France	127,815
6.	British Airways	126,841
7.	Ryanair	102,922
8.	Singapore Airlines	95,470
9.	Cathay Pacific Airways	93,672

Table 3 Passengers - Kilometers Flown. IATA, WATS 58th edition

3.3.4 Threats from other Airlines

In March 2015, three biggest US airlines – Delta, American and United – have been published a report, which promises to have evidence that Emirates has received billions of dollars in subsidies. The aim is to run a campaign to limit the growth of Emirates, Etihad and Qatar in US market.

That would mean that EK is competing unfairly under the terms of the open skies agreement between US and UAE government.

President of Emirates Airline, Tim Clark, confirms that subsidies are not been received from UAE government. He adds as well that, “we are going to stay focused on what we are doing, and continue to do it well. We will keep investing in our people, products, services and brands – so that travelers globally will continue to choose to fly with us.”

Emirates has been received letters and expressions of support from consumers, airports, and tourism and commercial entities in America.

In 2010, Emirates was declined in spots in BBI (Berlin Airport) which opened in October 2011. The Federal Ministry of Transport decided to support a national carrier

Lufthansa and strengthen market position. Wolfgang Weber, a Lufthansa spokesman, stated that it would be unfair Emirates operate a flight to Berlin, because they fly already to four destinations in Germany and Lufthansa can benefice only from one destination – Dubai (Emirates, 2010).

3.4 Airline Brand

David Haigh stated on “*The annual report of the most valuable airline brands*” that: “*The boardroom can sometimes feel like the tower of Babel, with CMOs and CFOs speaking mutually unintelligible language, damaging the prospect for what should be their shared goals. Brand Finance bridges the gap between marketing and finance*”

In February 2015, all over the internet passed the news of the most valuable brand in the Airline Industry. The leader is Dubai based, Emirates Airline, the first airline that appears in the list of the 500 most valuable brands in the world, ranked as 196th place (Marello, 2015).

In table 4 the results of the report can be observed. On previous Chapter, were discussed how what does brand value consists from.

Logo	Name	Brand Value (USD\$M)
	Emirates	6,640
	Delta Air Lines	6,336
	United Airlines	4,861
	Lufthansa	4,099
	American Airlines	3,649
	British Airways	3,645

	Southwest Airlines	3,466
	Air China	2,953
	Singapore Air	2,936
	China Eastern Airlines	2,914

Table 4 Top 10 Airlines Brands. Source: Brand Finance

In terms of international position Middle Eastern airlines has an advantage in cheap fuel, employee expenses and growing economy. Emirates is known as well with marketing campaigns: “Formula 1, the French Open and football teams from PSG to Real Madrid and Arsenal to AC Milan” (Brand Finance, 2015).

In 2015, Emirates not only became the most valuable brand in Airline industry, it is now as well in ranking of 200 of the most valuable brands in all industries. It is now on position of 196, an increase of 38 spots in just 12 months. 3 TOP of the most valuable brands in 2015 are #1 Apple; #2 Microsoft and #3 Google; all of them are from the same industry – technology. After impressive results, Tim Clark stated that it is very important the growth of the brand, it shows recognition from customers. He believes that brand it is not only about marketing and sponsorships, it is as well innovation, service and staff who breathe Emirates brand every day in the work they do. Emirates in becoming a synonym of travel and experience, is the mission of becoming the lifestyle brand.

3.5 External marketing

Figure x shows the whole EK system divided by Owned (Red in color), Earned (Purple) and Paid (Green).

Owned

By owned it can be considerate the tools that belong to Emirates. That includes Frequent Flyer Program – Skywards – it has been used to send monthly newsletter, reminder emails and promote partnerships. Site and mobile application are modern tools that facilitates in terms of check-in's online, booking a ticket, finding all information about services and destinations. Internal communication belongs to the next topic – internal marketing, and includes innumerous internal sites and portals which serve to communicate internally. Another owned system is ICE – inflight entertainment - the award-winning system. Airport, check-in counters, lounges, chauffeur drive – offered Emirates services, they all were discussed and described in previous topic. Posters, flyers, brochures making part of owned as well, they are on part of retail, as well as EK

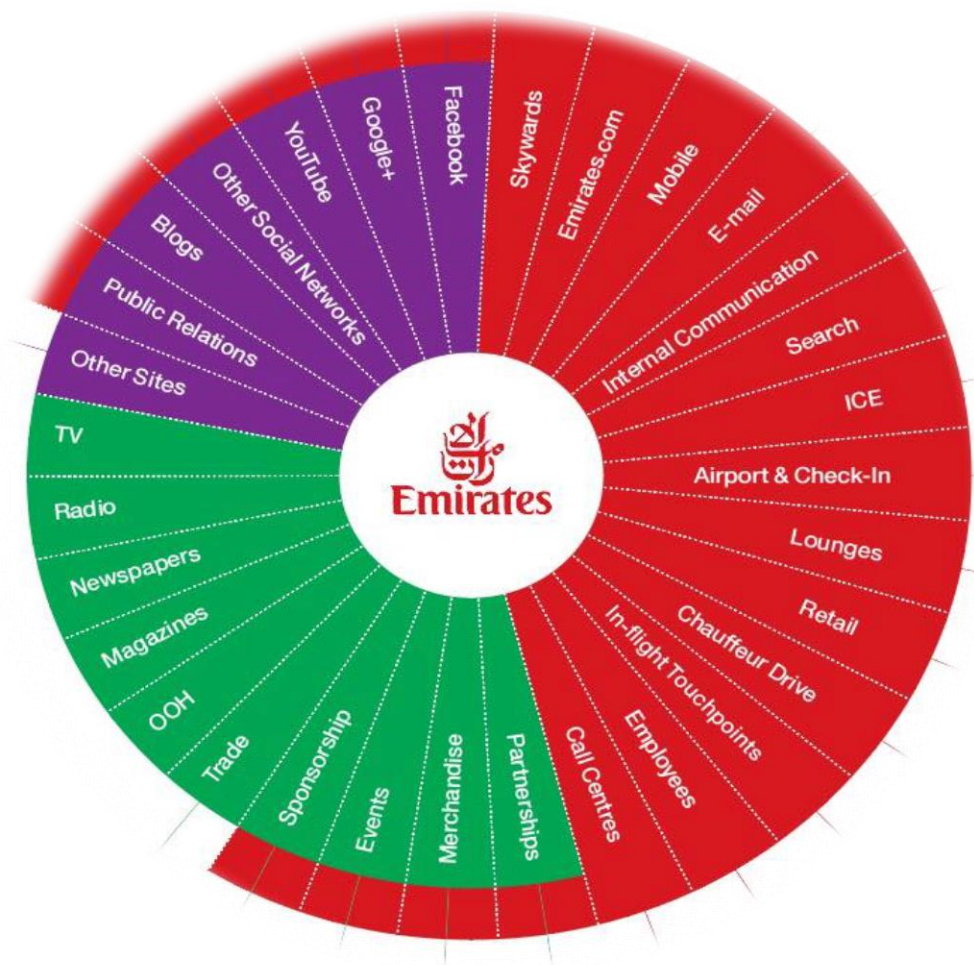


Figure 5 EK System. Source: Corporate communication department

Holidays shops.

By Earned tools to promote Emirates airline are considered all social network. With more than 4 million followers the fact of uploading posts, videos, photos on Facebook has become viral nowadays. Well managed social network channels are going to provide excellent and low cost promotion, as nowadays the first thing that people do is to “share” their passion and their thought on-line.

In a Green Zone of Figure X are mentioned all paid promotional tools. Sponsorship could be the one that Emirates invest the most. After the last game of the FIFA World Cup in 2013, the news about Emirates Cabin Crew delivering prizes to winners passed all over the social media. It is one of the ways Emirates is trying to create relation between the company and passion for sport. Shaw (2011) affirms that associating airline brand with radical sports is not that good idea, because an airline has to be associated with safety, when making sponsorship of Formula 1 can be risky. Emirates does so and it doesn't seem to transmit an image of unsafe airline.

Other great campaign on present section can be considerate association Emirates name with celebrities on their advertisements. An example of a campaign with a participation of Cristiano Ronaldo and Pele can be found in Appendix III.

Presented system, divided in different groups, is helping Emirates to engage in “always on” commitment that will help to build brand loyalty and add business value.

In Appendix III are shown as well other examples of marketing campaigns of offered services and products: all cabins, ICE system, airport lounges, A380 lounge, A380 shower SPA and chauffeur service.

3.5.1 Brands Emirates working with

Emirates brand is associated with high class travel and excellent service and products; it is relevant to make partnership with brands with the same position. It would be making any sense if Skywards Members would be gaining miles in staying in a hostel.

Emirates has a partnership with SPG program, all skywards members can benefice and earning miles in staying in Starwood hotels and resorts across nine distinctive brands, including St. Regis, Le Meridien, Westin and Sheraton.

When advertising Wi-Fi services on board, Emirates choose to have Apple as part of advertisement, the most valuable and most loved brands by many people in the world.

3.5.2 Hello Tomorrow

In 2012 Emirates launched new marketing strategy “Hello Tomorrow”, showing a global side of airline.

The new campaign shows multicultural mix, inviting people from around the world to travel, explore, try unfamiliar and create new ideas. Emirates is serving as ‘bridge’ to connect people, cultures and all the ideas. Values that are trying to be transmitted are in being Cosmopolitan and Inspiring, don’t be afraid to travel and explore new culture.

“Hello” is a greeting, an invitation to “Tomorrow”, the place where everything is possible within a reach. *“Tomorrow is here and anything is possible, Emirates, Hello Tomorrow”*.

In Appendix III are attached examples of “Hello Tomorrow” program.

3.6 Internal marketing

3.6.1 Who are the Emirates Cabin Crew?

The Emirates Cabin Crew team nowadays consists of a mix from over 130 countries and all together they speak more than 50 languages.

Emirates Cabin Crew can be described as cosmopolitan, innovative and travel explorers. They travel all over 120 destinations, 6 continents to exceed customer expectations and make their flight memorable. Team of almost 20.000 cabin crew consists from people from different backgrounds and cultures. Not everyone knows that cabin crew on their flight on Emirates can be as well nurse, architect, lawyer, dentist or even musician; and all of them share the same passion: passion to travel and discover the world.

Cabin crew are not the ones who are responsible for safety, security and the service, they are the ones who will actually make an atmosphere on a flight.

3.6.2 Emblematic Uniform

Red hat and red lipstick are probably the most famous parts of Emirates uniform. As it can be observed on a picture below, those parts are present in uniform since 1985.

Nowadays, EK cabin crew participate in all events that receive sponsorship from Emirates, all publicity and all placard.

“The Emirates cabin crew uniforms have become symbols of excellence. Whether supporting the ceremonies at major sporting tournaments such as the FIFA World Cup, or looking after passengers on board one of Emirates’ flights, the staff who don these uniform are fully aware of all that they embody.” James Knights (Open Skies, April 2015).

As an Emirates crew it is mandatory to have a full day of grooming standart classes during first 5 weeks in training college. It exists an actual manual of image and uniform rules to maintain standarts and explain like por example, the nail colour has to be clear, french or the same red as the lipstick and hat.



Image 7 First Emirates Cabin Crew

3.6.3 Inspiring Training

After signing a contract and coming to Dubai, all new joiners will have five week training and 6 months of probation to become part of international team.

Training includes Safety, Medical, Security, Image and Uniform, and Service programs. But one day program is different from all others. It is called Nujoum day and it is based on workshop that shows new cabin crew to go beyond any expectation on board. During that day of training new joiners will pass through challenges based on service personality, teaching in being: Personal, Cosmopolitan, Considerate, Pioneering and Thorough.

On the end of the day, each of participants will make a Nujoum promise, which they will try to implement on each flight.

After training is finished cabin crew has opportunities to participate in innumerable forums and workshops. It can be a tour to catering facilities, or brand orientated workshop, or customer service related workshop or even forum where you can present your ideas to management.

3.6.4 Caring, Inspiring and Cosmopolitan

Caring

Internal e-mail's and internal cabin crew portal are full of stories of Cabin Crew that did something beyond expectation on-board. The stories will be defined by categories of Personal, Cosmopolitan, Considerate, Pioneering and Thorough. Each cabin crew nominated with a Nujoum Star (it is an award of being exceptional) can choose any flight that they would love to do on the next month as prize.

All cabin team care about their customers and try to deliver the best flight experience on board. One of the parts of service is "We Care", this part is not seen by customers. "We care" service is conducted whenever the main service is finished and it consists from 3 cycles: cleanliness, customer care and refreshments. Cabin Crew have to make sure that cabin, aisle and toilets are always in order, as part of safety and service reasons. Customer care includes a small part of public relation, crew have to be in a cabin to interact with customers, take pictures with polaroid camera and be always present. The last cycle is offering drinks and keep customer hydrated.

Inspiring

Emirates has been challenging all employees, as well as cabin crew team for “Be there challenge” concourse. The challenge may be considerate as a new marketing strategy to demonstrate the cosmopolitan team and promote EK destination. Concourse consists in competition of videos to share passion of flying and travelling. The winners would be selected to present films to social Media’s followers to inspire people to fly more and influence decisions the world over.

As mentioned by Jamie Knights in onboard magazine “Open Skies” (June, 2015): *“Emirates staff are inspiring people to get out and explore their passion around the world as part of the new ‘Be There’ social media campaign. Where will you fulfil your dreams?”*

The challenge serves to show, that Emirates is full of incredible passionate employees who combine their own interests with a love of travel.

Cosmopolitan

After take-off on each flight, public announcement will say: “Our multinational cabin crew on board today come from <number> countries and speak <number> languages”. The <number> on each flight will be different but it would never go less than 10 each of them. In being part of that multinational team on board of each flight, cabin crew face many challenges and learn how to understand each and every one beside country of origin, language spoken and religion.

Each flight team on-board is changing and nationalities will be changing each and every flight. And it is not only cabin crew team. The whole Emirates Group team is multinational – having in count 169 nationalities as employees.

In working in such cosmopolitan environment each day, it teaches staff in being comprehensive to culture difference. And it is not only internal multinational environment; passengers on each flight are from everywhere in the world with different background, culture and language.

3.7 PESTE Analysis

The best way of studying marketing environment would be the application of PESTE Analysis, which is dividing important factors into the categories of Political, Economic, Social, Technological and Environmental. This model is very efficacious in the airline industry. Airline marketing would be always depends on political decisions, economic circumstances, social issues, technologic challenges and environment threats (Shaw, 2011).

Political factors	<ul style="list-style-type: none"> • Emirates airline, as a Middle East airline had influences from Iran-Iraq war (September 22, 1980, until August 20, 1988). • 11th of September 2001 did not affect Emirates, on the contrary the Chairman maintain their plans “to prove that we really are the most unique travel team in the world”. • Consequences of Syrian Civil war is closed airspace over Syrian territory. • 8th of June 2014 – attacks at Karachi airport, where Emirates operating 6 daily flights. • 17th of July 2014 – after Malaysian airplane tragically crashes in Ukraine, Emirates stop flying over Ukrainian airspace and suspend their flights to Kiev. • 13th of August 2014 – Emirates suspended flights over Iraqi airspace due to military conflicts in a country. • 27th of March 2015 – re-routing flights to Nairobi, Kenya due to Yemeni airspace closure. • Example of German airports: Berlin and Stuttgart are still “closed” destination for Emirates. • Israel would be always a closed destination for political reasons. • State of ownership: flag carrier of Dubai, National airline of UAE until formation of Etihad Airways in 2003.
Economic factors	<ul style="list-style-type: none"> • Emirate is poised ideally to fly people between regions with double-digit economic growth rates, avoiding the crisis in the develop world that has hurt passenger numbers. (Riva, 2013)
Social factors	<ul style="list-style-type: none"> • Emirates Airline is equipped with Tempus

	<p>(telemedicine system to connect with medics on ground), defibrillator and all vital medical kits, as well as on-board wheelchair that facilitate travelling for disabled passengers.</p> <ul style="list-style-type: none"> • Trained and prepared Cabin Crew for medical situations onboard (even child-birth). • Baby bassinets onboard, baby trolley in Dubai Airport, examples of carrying about customers travelling with kids. • All offers and services are redirected to please all type of market segment (as examples, calm and relaxing first class with shower spa or lounge area in premium cabins for the ones who like to enjoy cocktail and meet people on board).
Technological factors	<ul style="list-style-type: none"> • ICE (Information, Communication and Entertainment) system on-board. • Shower Spa facilities on all A380 (First class passengers). • Lounge on all A380 (First and Business class passengers). • Free Wi-Fi on-board and all A380 and some of B777 aircrafts. • Emirates App for smartphones for information, reservation, check-in online and registration on Frequent Flyer program. • New Emirates Apple Watch App, which will even remind how many minutes left until boarding starts.
Environmental factors	<ul style="list-style-type: none"> • Eruptions of volcano in Bali have been caused delays and cancelation of flight in July and August 2015.

Table 5 PESTE analysis

3.8 SWOT

In order to conclude the internal business model and external factors, the analysis SWOT was conducted. The method of analysis SWOT is divided in studying strengths and weaknesses of the company – internal environment and opportunities and threats – external environment. In table 6 is conducted analysis SWOT for Emirates Airline.

Strengths	Weaknesses
<ul style="list-style-type: none"> ● Multicultural Staff ● Modern and new fleet ● Geographical location – hub ● Brand ● High Class Products ● Luxurious Service ● Forward-thinking management ● Social Media ● DXB, Terminal 3 ● Specific route products 	<ul style="list-style-type: none"> ● Multicultural Staff ● Social Media ● Imposed high standards to be maintained ● Difficulty of adapting of growing number of cabin staff by HR management ● High rotation of cabin staff ● Only one-base Dubai
Opportunities	Threats
<ul style="list-style-type: none"> ● Low fuel rate ● Geographical location – hub ● Industry ● Middle East region in growth ● Costs of labor resources 	<ul style="list-style-type: none"> ● Airspace closure do to military actions ● Threats from competitors ● Qatar and Etihad, competitors with similar services

Table 6 SWOT analysis

In terms of strengths most of the aspects presented were discussed in previous topics of case study, excluding specific route products. As a global brand, Emirates is trying to adapt to all cultures. Almost each flight has a specific route products or menu. In Indian and American sectors vegetarian meal is part of a meal choice due to high number of Indian customers traveling on those routes. European flight would have a special selection of Lindt chocolates and ice cream on-board. Asian routes would guarantee availability of instant cup of noodles and green during the service. On Japanese flight a selection of Japanese beer Asahi and sake would be offered.

As it can be observed, multicultural staff and social media are mentioned in both, as strength and as weakness. In previous topics staff were analyzed as strengths of company, but in the same time it is hard to control such a big team with different

backgrounds. When customers travel with Emirates cabin crew can be mentioned on part of compliments and appreciation or poor service and complaints. The same happens in social media, anything positive or negative that someone posts on social media become viral in few minutes. One of the parts to projecting image of a company is in alerting staff to not associate Emirates image to anything that might disrespectable. Other weakness that appeared on last years is a high rotation of cabin staff. Quick growth of airline due to increasing flight frequencies, new routes and delivering of new aircrafts results in growth of staff. It results in stricter rules, more flying hours and not adaptation of HR to manage high number of staff efficiently.

Being located in Middle East it can be a great opportunity. First of all, the location of hub is perfect for connecting flight between continents. Other great factor is low cost of fuel comparing to other countries and low cost of labor in the airport due to high migration of less developed countries of Middle East. And finally, industry itself is in constant growth, this fact is an opportunity for all airlines.

Location in the Middle East region can be threat as well. The military situation in countries where Emirates fly to and closure of airspaces are two big threats that might affect security and reduce airspace for commercial use. And other threats from other airlines, were discussed in previous topics.

3.9 Customer's feedback

Emirates cares about customer's opinion, preferences and life style. The following information represents Emirates customer feedback about some topics (2014):

On-board food: light meals, such as salads and fresh fruits are one of the most popular on board, as this kind of food is easy to digest, while travelling. Passengers tries to avoid carbohydrate rich food, considering it as "heavy" meal.

Customer's favorite brand: In terms of favorite brands in leisure, clothing, technology, entertainment and food, the most favorite brand was Apple. Armani and Samsung were as well popular choices. The brand qualities that passengers wanted to see are 'Consistency', 'Quality' and 'Reliability'.

Customer Trends: My Status – People have always craved the 'personal touch. Being able to provide that means a company is more likely to engage with its prospects, turn

them into customers and retain them. Despite the growth of personalization and multi-channel business, consumers appreciate a ‘personal touch’. Being treated as an individual goes a very long way and benefits both the customer and the brand. Customers who feel welcome, comfortable and appreciated are more brand loyal and spend more.

My Time - Modern-day travelers like to make the most of their time. For Emirates customer’s noise from other passengers or announcements is the key distraction during a flight.

My Space - Consumers appreciate quality and luxury, even where spaces are small. A few simple luxuries in a small space can make a big difference. Emirates customers believe First and Business class are spacious and the overall experience I very regarded, but customers do feel improvements could be made to the lack of personal space in Economy.

3.10 Vision for the future

Vision for a company it is a goal, which is idealistic and realistic picture for the future, a statement where the company wants to be and believes to be in the future five or more years (Dym, Egmont & Watkins 2011).



Figure 6 Emirates Vision. Source: Corporate Communication Department

Communication and Marketing departments in Emirates have been decided to set up a pyramid to explain the vision of the company in terms of branding. As it can be observed on the Figure 6, three relevant brand values are in being: Caring, Inspiring and Cosmopolitan. The tree brand values, that EK trying to transmit externally and internally for all stakeholders. The final goal is to become “one of the world’s most recognized and loved lifestyle brands”.

Chapter 4 – Methodology

4.1 Research methods

Literature review and case study presented in previous chapters are serving as a base for a research part. This chapter presents the methods applied for obtaining and analyzing data. This part consists as well of limitations of the research and development of hypothesis.

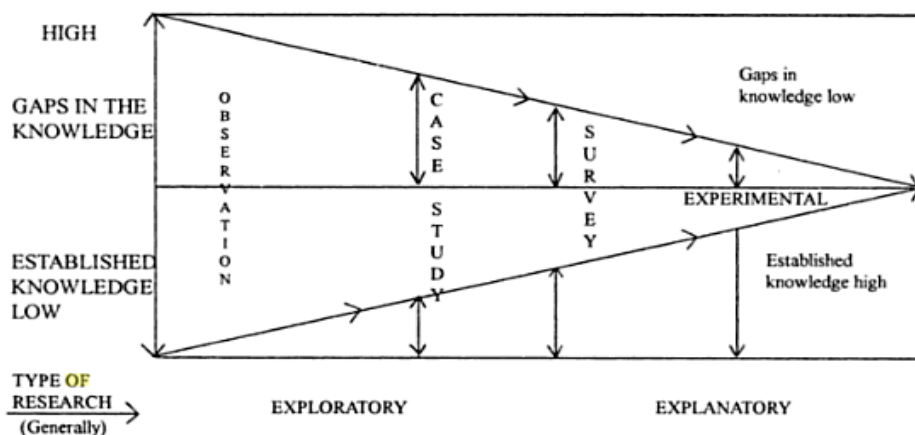
The aim of research is to understand if people recognize Emirates, the importance of an airline in a travel journey and relevant aspects of the flight.

In the first chapter the existing literature were reviewed. To be able to complete a thorough analyze, it is not possible to avoid already existing research, even though studies in tourism and leisure are comparably new areas of academic enquiry (Veal, 2006).

Next chapter focuses on case study, where used information is already existing data. Veal (2006) considers, that existing data is secondary data and “*it is clearly wise to use existing information where possible, rather than embarking on expensive and time consuming new information collection*”. One of the disadvantages may be the fact that all available information is not ideally suitable for current project.

Present chapter presents the new data, collected by researcher and it can be considered as primary data, because a researcher is a primary user. (Veal, 2006)

Pawar (2004) affirms that the research goes from exploratory to explanatory phase in hierarchical manner. In the Figure, it can be observed that researchers start by using observation and case studies, and when the knowledge is moderate survey researches are taking place.



4.2 Research question and Hypothesis

In order to achieve the objectives, which were presented in Chapter 1, it is relevant to respond to research question.

Question: Emirates is a lifestyle brand or an airline with strong marketing strategies?

In order to understand better, the following hypotheses have been studied:

Hypothesis 1: Customers are loyal when choosing an airline for travel.

Hypothesis 2: For customers is relevant to have a service of excellence during a flight.

Hypothesis 3: Travelers recognize Emirates logo and Emirates cabin crew uniform between competitors.

4.3 Quantitative method

The method that has been chosen for the current study is a quantitative method – questionnaire.

In quantitative tourism research, the most applied methods are statistical testing techniques, especially in terms of tourist behavior. It can be considered as a key to identify perception of destination images, travel motivation, behavioral intention, perceived service performance, and satisfaction. (Dwyer, Gill & Seetaram, 2012)

Veal (2006) as well describes questionnaire based methods, as the most frequently used in tourism research. Questionnaire based survey are easy to be conducted and results are in numeric terms.

Murray (2003) refers to two authors to characterize quantitative method for the research:

- Quantitative methods are used by researcher with numbers and statistics. Researcher looks for a general description or for a testing of hypothesis. It usually composes of numerical dimensions of precise aspects of phenomena. (King, Keohane, & Verba, 1994. Pp.3-4)

- “*Quantitative researchers seek explanation and predictions that will generalize to other persons and places. Careful sampling strategies and experimental designs are*

aspects of quantitative methods aimed at produce generalizable results.” (Glesne & Peshkin, 1992, p.6)

4.4 Questionnaire design

It may seem that wording, and order of questions and simple graphic designs are easy in a questionnaire, but it more challenging and important. It is necessary to ensure that design of a questionnaire is respondent-friendly, but still have all information that researcher need to analyze (Smith, 2010).

Veal (2006) defines five different types of the survey in leisure and tourism: street, telephone, mail, e-survey, on-site and captive group survey. For the present research the most appropriate was the on-site survey. This type of the survey is conducted on a place where it is more accurate to find tourists and the group of people the most important for the research.

Questionnaire has 10 questions and can be divided in three parts:

First part: personal information of respondents. Questions 1, 2 and 3 are multiple choice questions about gender, age and academic degree. The 4th and 5th questions are open-ended questions, which require a respondent to fill the information about occupation and nationality. The question about nationality it is relevant in current study, because of international customers of the company of the research.

Second part: Questions 6, 7 and 8 are made to analyze the level of loyalty of the customers for a certain airline. Question 6 is designed to know the principal reason that takes customers to choose an airline for travelling. The next question is important to understand the percentage of respondents that make a part of any loyalty program with an airline – frequent flyer program. 8th question is made to realize the number of people who would book a ticket directly with an airline.

With the last question of the second group, the researcher wants to understand the importance of some aspects before the flight and on board, such as: check-in, boarding, aircraft aspect, cabin crew, food and entertainment.




Questions were based on a research of Clemes, Gan, Kao & Choong (2008), where qualities that consumers consider when rating an airline were studied. They are timeliness, assurance, convenience, helpfulness, comfort, meals and safety.

Third part: the first successful part of any brand is recognition. The last part of the questionnaire is made to see if respondents recognize airlines logo and uniforms of employees. The most important brand ambassadors of each airline are cabin crew and they are important part of image. In the following part, it is explained in details the reason why airlines have been chosen for the research.


For this questionnaire, tourists who do travel by plane were interviewed in London Heathrow Airport, Charles de Gaulle Airport, Merlion Park in Singapore and Opera in Sydney. Countries, where the survey were conducted, were selected based on availability of the researcher and based on most touristic places with elevated number of international tourist traffic.

4.5 Airlines of the research

To understand better chosen airlines for the research, the following table shows the logo, airline name, home base and reason why the certain airline is on the list of the questionnaire.

<i>Logo</i>	<i>Airline Name</i>	<i>Base</i>	<i>Reason to choose for analysis</i>
	Qatar	Doha, Qatar	Qatar and Etihad airlines have the same beneficiary geographical location, offering great opportunity for connection flights between all continents. As well as EK both airlines have similar standards as luxury Middle East airlines with cosmopolitan cabin crew. They may as well be considerate as principal competitors.
	Etihad	Abu Dhabi, UAE	
	Singapore Airline	Singapore, Singapore	Singapore airline has high standards in service and is a competitor in Asian market. Often Singapore and Emirates are mentioned together as innovator airlines, as an example an author Stephen

			Shaw in Airline Marketing and Management.
	Qantas	Sydney, Australia	Qantas is an iconic Australian Airline that formed partnership with Emirates.
	Lufthansa	Frankfurt, Germany	Lufthansa has strong position in Europe, considers Emirates as a strong competitor and it would be the reason why they fights to bar EK from Berlin. Lufthansa is as well as Emirates on Top 5 of most valuable airline brands 2015.
	Emirates	Dubai, UAE	The Airline of case study.
	Virgin	Virgin Atlantic (Crawley, England) Virgin America (San Francisco, America) Virgin Australia (Brisbane, Australia)	Virgin is a huge famous brand that incorporates Virgin Atlantic, Virgin America, Virgin Australia, Virgin Holidays and Virgin.com. Virgin is famous as well by Richard Branson, who was named top social CEO.
	Air New Zealand	Auckland, New Zealand	In 2015 Air New Zealand won for the second year the best Airline of The Year by AirlineRatings.com
	Delta	Atlanta, Georgia, USA	Delta, United and American Airline are in the top 5 of the most valuable airline brands of 2015.
	United	Chicago, USA	Those three biggest US airlines are running a campaign aimed at limiting the growth of Emirates in US

			market,
	American Airline	Fort Worth, Texas, USA	reporting that they have evidences of received subsidies from UAE government by EK.

4.5 Data Collection

Data collection was completed by 110 participants in four days – 7th of April, 17th of April, 20th of April and 2nd May of 2015. The survey took place in Paris, London, Singapore and Sidney, accordingly. The exact places were mentioned in a previous section.

4.6 Limitations of the Research

Despite complex research, that includes literature review, secondary and primary researches, this study has some limitations.

The important fact that a researcher is part of the Emirates employees is advantage for understanding better the topic from the inside, but it is disadvantage in terms of impossibility to conduct direct questionnaires with Emirates costumers.

First limitation and the most relevant might be considered the fact that Emirates Airline is an international airline and flies all over 6 continents. The market segmentation is very diverse, that makes hard to make a conclusion based on 110 questionnaires.

Second limitation, is the possibility of the researcher due to time and budget to conduct questionnaires in more countries where Emirates has very strong position in the market.

The fact of language barrier in some countries of the research might be one of the reasons of not precise answers.

Another limitation is the fact that used methodology to study the current research is case study and quantitative method. Unfortunately, the results were not combined with qualitative research.

Other important limitation is the fact that Middle East aviation is very recent topic in studies and availability of secondary data is very limited.

The last limitation might be considered many surveys declined by tourist with the reason of not available time or language barrier.

Chapter 5 – Main findings

The research question will be studied in this chapter, in which all necessary information will be analyzed in order to reject or confirm hypothesis.

5.1 Response rate

The following Table 7 is representing response rate and showing variables in terms of gender, age and academic degree.

	Ranking	Response	Results in %
Gender	1°	Male	52,7
	2°	Female	47,3
Age	1°	26-45	47,3
	2°	46-65	33,6
	3°	18-25	19,1
Academic degree	1°	University	60,9
	2°	High School	34,6
	3°	Elementary School	2,7
	4°	Other	1,8

Table 7 Personal Information

As can be observed from the table, from the total of 110 participants 52.7% were males and 47.3% females. The scale of age varies from 18 to 65 years old. The majority of respondents is from 26 to 45 years old and represents 47.3%; next group is with age from 46 to 65 years old (33.6%). The group which has less percentage is from 18 to 25 years old with only 19.1%. In terms of academic degree, the highest percentage of respondents has a university degree – 60.9% and the following group has finished high school and has 34.6%.

In the next Figure, it is possible to perceive a variable of nationalities of the respondents. In total the researcher had an opportunity to question tourists from 13 different nationalities. The most asked travelers were from United Kingdom (21.8%), Australia (17.3%), France (13.6%) and Ireland (10%). The fact of the majority of the respondents speaks French and English is based on fact of the language barrier with other nationalities. The rest of the nationalities are mentioned on a figure bellow.

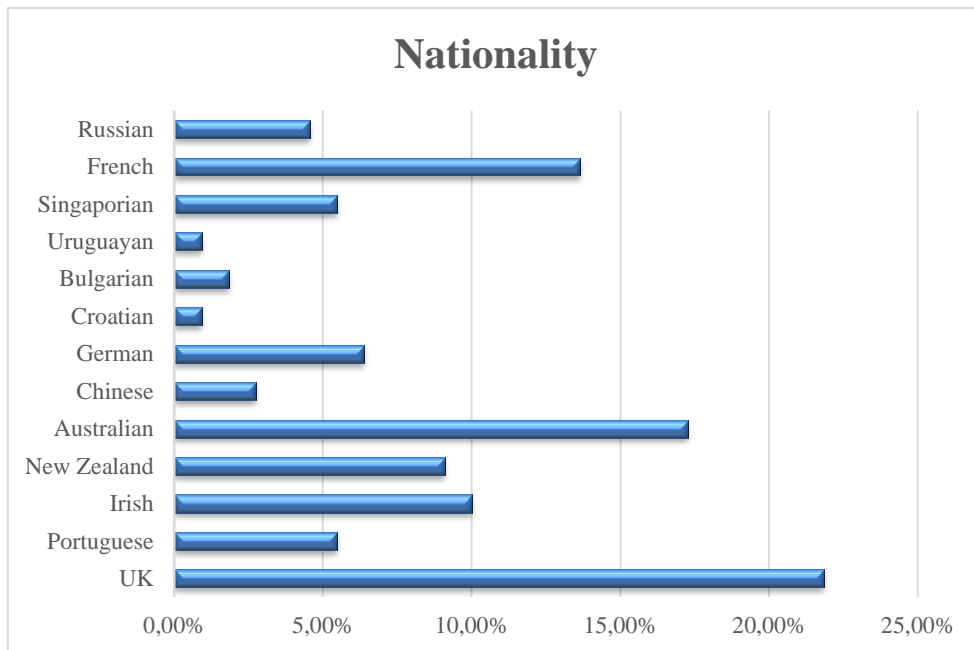


Figure 8 Nationalities

The last question of the first group of questions is about occupation. It was an open-ended question and some of respondents had difficulties of describing area. After analyzing questionnaires, researcher divided answers into groups of areas. The biggest number of participants is from commercial and sales area – 19.1%. The second position with 15.5% has been taken Sport area. And the following leading profession was “Management” with 12.7%.

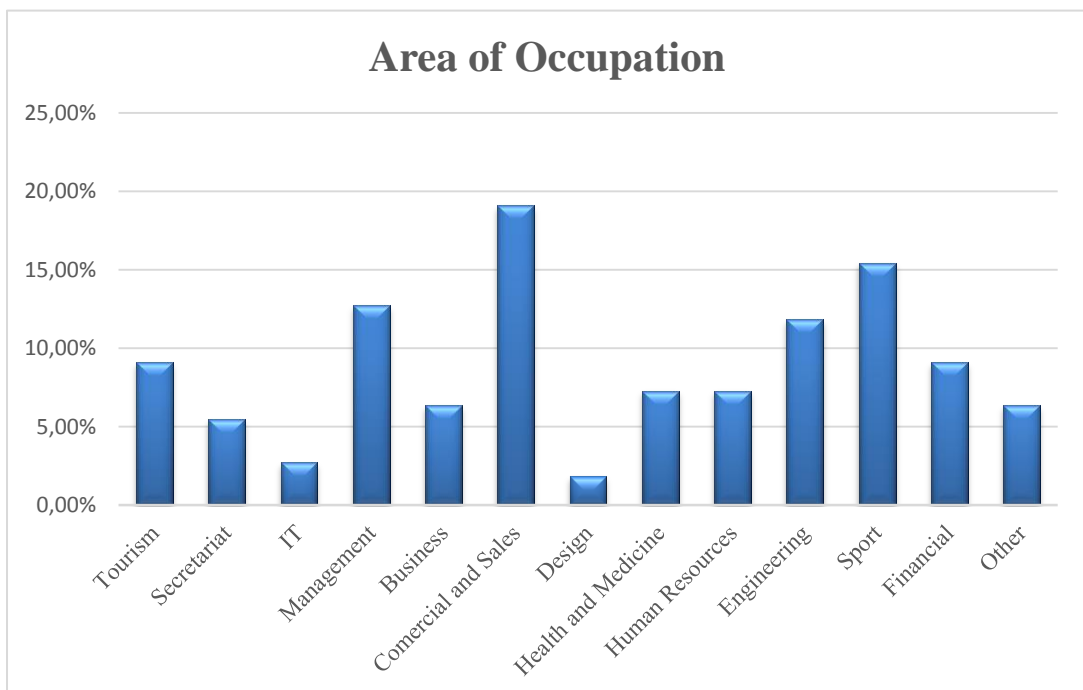


Figure 9 Area of Occupation

5.2 Hypothesis 1:

Customers are loyal when choosing an airline for travel.

The second part of questions starts with very relevant theme, the reason why travelers choose a certain airline for travelling. Shaw (2011) affirms that in airline industry it is a big gap between ‘Consumers’ and ‘Customers’, which means that ‘Consumer’ – people who actually travel are not the one who are decision-makers – ‘Customer’.

Figure below shows results for the question about the reason that takes customer to choose an airline for travel. The participants could choose 3 options that they will be looking for before booking an airline ticket. The most popular answer was “lowest price” with 24.8%, which means that participants don’t consider air travel as a relevant service in their journey, it is more a way of transport and they would rather spend money on other services. The next popular choice was “convenient schedule” with 23%, where airlines with more scheduled flights would be chosen more easily.

The following answer proves a theory about big gap between ‘Customer’ and ‘Consumer’, because 22% of respondents they don’t choose as airline for travel, the ones who would choose airline for them are either travel agents or in business travel it would be company who make a final decision.

The two answers that would show the loyalty from travelers – “frequent flyer program” and “certain airline” are the ones with 11.3% and 4.8% respectively. It shows very poor level of loyalty for airlines of choice. The lowest percentage has a reputation factor with only 3.9% and people who are willing to spend more money for an airline service are 10%.

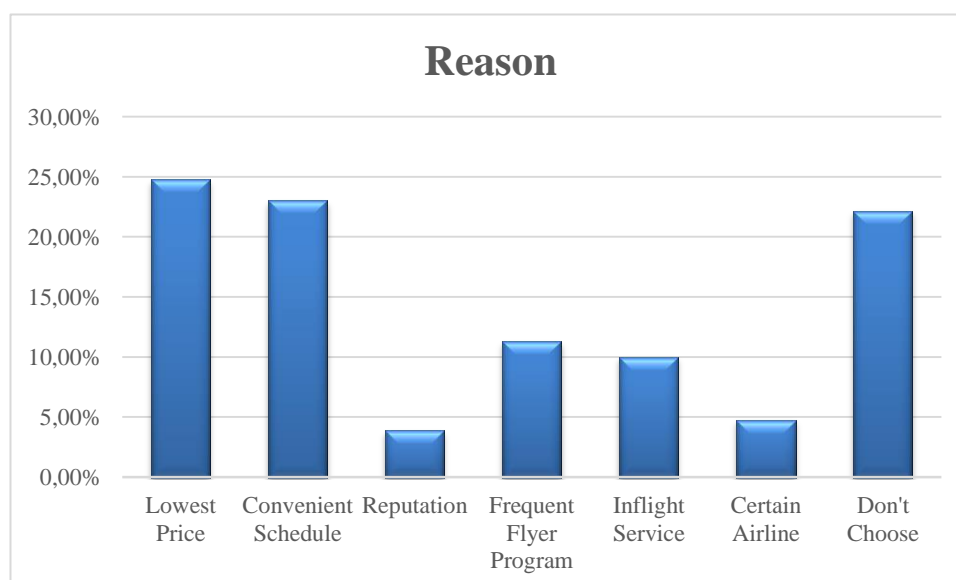


Figure 10 Reason

Second question is to understand how many of participants are member of any Frequent Flyer Program. Shaw (2011) believes that frequent flyer programs are at the heart of marketing in the airline industry, allowing passengers earn points from flights and also staying in hotels, renting cars, or even using their credit cards.

In a figure bellow it is obviously observed that biggest part of respondents is not members of any loyalty program of an airline. Only 23.6% have been participating on FFP. It means that airlines have to promote better their programs in way to attract more loyal customers.

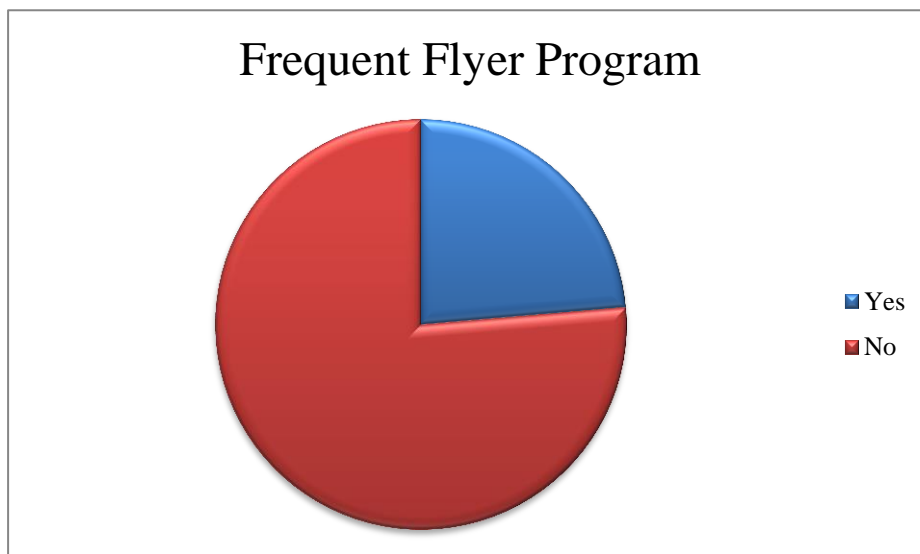


Figure 11 Frequent Flyer Program

Next Figure bellow shows variables of places were travelers book their airline tickets. The most popular answer is "travel agent office" with 39.1% and only 29.1% would book directly with an airline and some of them confirmed that they would first check any on-line distributor to see which airline has a better rate.

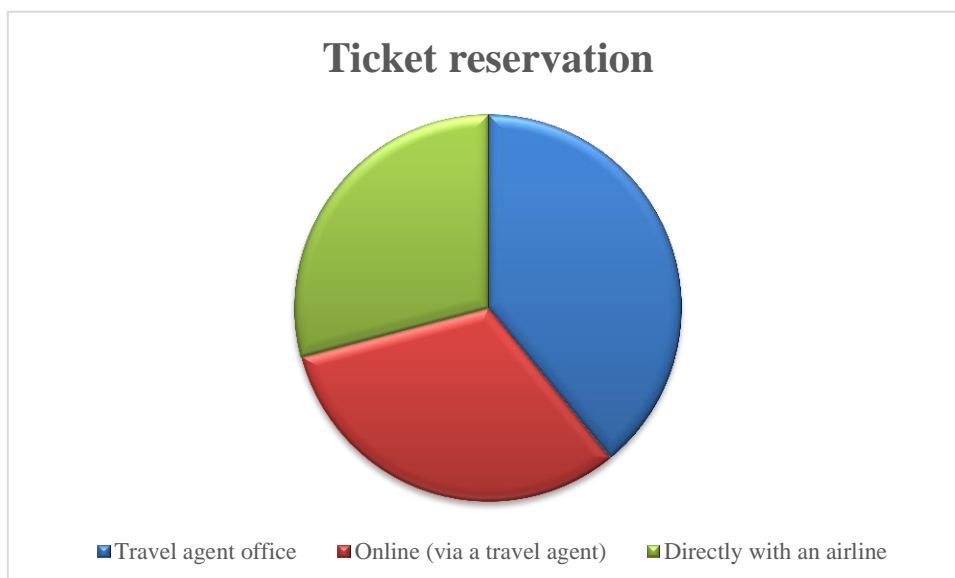


Figure 12 Ticket Reservation

5.3 Hypothesis 2

For customers is relevant to have a service of excellence during a flight.

Question n° 9 reveals the importance of difference aspects of the flights.

Very important aspects are considerate “waiting tome in queue” (53%), punctuality of the flight departure (77%) and “cleanliness of aircraft” (75%). Important factor is “Comfort of seats” with 36%.

Participants were asked to choose as very important and important aspects only the ones that they would really matter to see during trip, in this way the researcher would have distract on only the most important aspect for travelers.

	<u>Unimportant</u>	<u>Of little importance</u>	<u>Moderately important</u>	<u>Important</u>	<u>Very important</u>	<u>No answer</u>
Ease of check-in procedure and efficiency of staff	0%	18%	41%	38%	0	3%
Waiting time in queue for check-in	0%	0%	11%	34%	53%	2%
Efficiency of aircraft boarding	11%	13%	39%	27%	5%	5%
Punctuality of flight departure	0%	0%	3%	16%	77%	4%
Choice of newspapers/magazines at boarding gate	21%	36%	29%	6%	2%	5%
Cleanliness of aircraft	0%	0%	3%	16%	75%	2%
Comfort of seats	0%	3%	31%	36%	29%	3%
Courtesy and helpfulness of cabin crew	0%	2%	66%	21%	11%	5%
Quality of food and drinks	0%	6%	55%	32%	13%	5%
Inflight entertainment	0%	9%	39%	28%	18%	5%
Inflight reading material	11%	35%	35%	9%	4%	6%

Table 8 Aspects of flight

The aspects that don't have much relevancy for customers nowadays are reading materials: the ones at the gate (36%) and the ones onboard (35%). Respondents consider that factors as “little of importance”.

5.4 Hypothesis 3

Travelers recognize Emirates logo and Emirates cabin crew uniform between competitors.

The last part of questionnaire was considered the most interesting for the majority of the respondents. Some of them took it as a competition between each other to see who will get more answers right.

The most recognized logo and uniforms are Emirates with 89.1% of recognition. The prize of the “second most recognized” has Virgin Airline with 69.1%, it might be explained with the fact of places questionnaires were conducted: Sydney and London (places where Virgin brand has a very strong position). The third position has Lufthansa with 57.3%, very strong European brand and Emirates competitor.

Qatar and Etihad, the other two Middle East airline companies and Emirates competitors, lose EK in recognition. Only 32.7% recognized Qatar airline and Etihad has even less percentage – 20.1%.

The less recognized brands are the Americans airlines – Delta (16.4%), United (18.2%) and American (10.1%). In the following Figure it is possible to visualize results for all airlines.

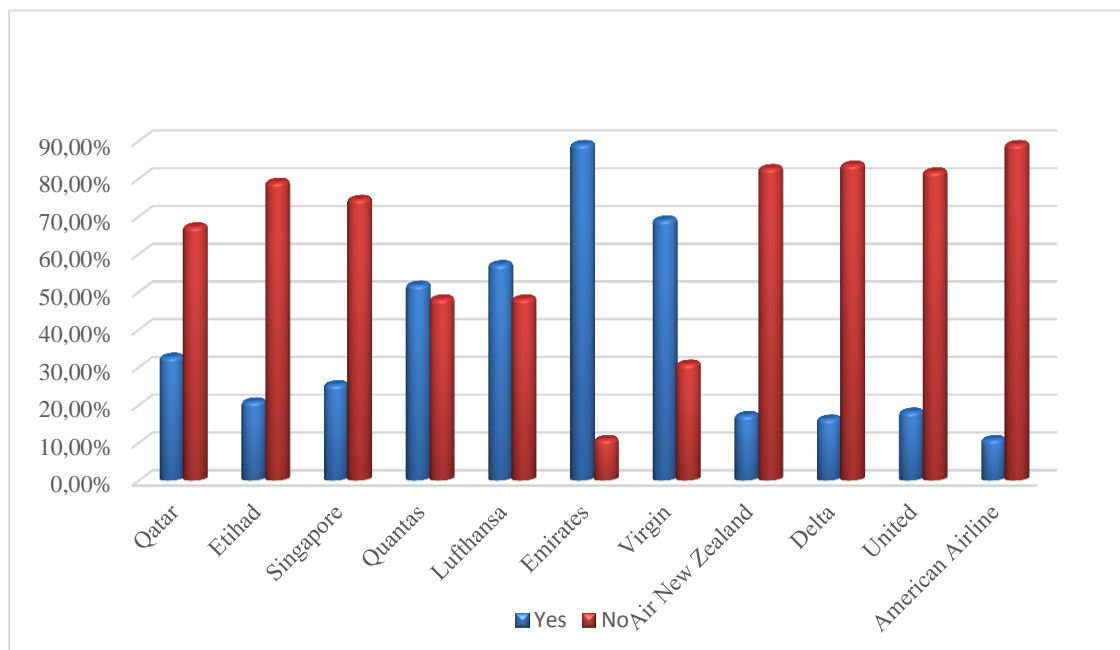


Figure 13 Airline recognition

5.5 Conclusion

On previous chapter were described 3 hypotheses that were set for obtaining better results from the research. The present Chapter shows main finding and data obtained from questionnaires.

The first hypothesis about the loyalty is rejected. The answers from participants clearly show that customers are not ready to choose a specific airline for travel and they are not loyal to any of them. An airline is rather seen as a way of transport than service.

The next hypothesis about excellence of the service can be denied as well. The most important aspects for customers are basic and don't have to do with an excellent service on board. The punctuality and the cleanliness are the most important factors for the majority.

The last hypothesis about Emirates recognition is the only hypothesis that is confirmed. From the results Emirates is the most recognized brand from the competitors. EK logo and emblematic uniform are easily and quickly recognized between other competitors.

Chapter 6 – Conclusion

This research focused on understanding how branding can be related on airline industry. For the case study was chosen Emirates Airline, the most valuable brand in airline industry in 2015. The aim of the case study was to understand the brand strategy of Emirates and how an airline can be lifestyle brand. The primary data collected was to find out if tourists recognize airlines logo and uniform and the level of loyalty to choose airline to travel.

The findings from the case study show that EK strategies are brand orientated on two levels: external and internal. For external marketing they choose strong publicity to create values with the customer. Emirates choose all channels to implement marketing strategies and promote global brand. They are divided in EK system by Owned, Earned and Paid. Big campaign “Hello Tomorrow” is trying to transmit two brand values of airline – in being Inspiring and Cosmopolitan. In choosing to sponsor big sport events and to work with sport celebrities in advertisement, Emirates is trying to reach the loved part of lifestyle of customers. Even in terms of partnerships, companies have to be all high standards, as an example Starwood channel.

In terms of internal marketing, the inspiring training for staff creates the same brand values for the ones who deal directly with customers. By teaching cabin crew in being Caring, Inspiring and Cosmopolitan, Emirates believes that they will transmit the same values on board and create psychological connection with the customers. They consider that creation of the brand values has to be first at all from inside of the company.

In other hand the investigation conducted by the researcher shows, that Emirates is the most recognized brand comparing to competitors. The respondents easily and quickly recognized Emirates emblematic uniform and logo. But in fact, only 4.8% of tourist will be choose a specific airline for travelling. The results show poor connection between travelers and airlines. 22.2% of respondents don't even choose an airline for travelling and don't really matter which airline they are using. After these results it can be made a conclusion that people are not ready to see an airline as a lifestyle brand.

Emirates was considered already the most valuable airline brand in 2015 and it is number 196 in the list of the most valuable brands in all industries. After seeing impressive results in ranking and analyzing marketing strategies, the conclusion is that

Emirates is being progressive in becoming the lifestyle brand. The difficulties may be considerate the fact that it is a company of air transport and big amount of people doesn't travel very often. The area of hospitality that includes service it more complicated in terms of creating brand. As it could be seen the most valuable brands in the world are brands in technological industry and they are offering products.

For conclusion, is The Emirates is a lifestyle brand? After analyzing data, studies and authors reviews, the answer would be that Emirates is not yet a "lifestyle" brand, but it is a company with strong brand orientation to become one. And EK management believes that Emirates will become a synonym of travel and new era of Globalista's.

References

- Abeyratne R., 2013. *Regulation of Air Transport: The Slumbering Sentinels*. Montreal: Springer
- Aufreiter N., Elzinga D. & Gordon J., 2003. *Better Branding* Available from: http://wpi_website.s3.amazonaws.com/323700/467818 [Accessed 5 September]
- Belobaba, P.; Odoni, A.; Barnhart, C., 2009. *The Global Airline Industry*. West Sussex: Wiley.
- Boeing, 2015. *Long-Term Market, World Regions*. Available from: <http://www.boeing.com/commercial/market/long-term-market/world-regions> [Accessed 10 July 2015]
- Brand Finance, 2015. *The annual report on the world's most valuable airlines brands*. Available from: www.rkingthebrands.com/The-Brand-Rankings.aspx?rankingID=218&year=913 [Accessed 12 April 2015]
- CAPA, 2014. *World Aviation Yearbook 2013, Middle East*. Available from: <http://centreforaviation.com/reports/> [Accessed 11 July 2015]
- CAPA, 2015. *Aviation Analysis: Middle East & Africa*. Available from: <http://centreforaviation.com/analysis> [Accessed 15 September 2015]
- Carvalho S., 2002. *UAE and U.S. sign open skies accord*. Available from: <http://m.gulfnews.com/news/uae/general/uae-and-u-s-sign-open-skies-accord-1.380771> [Accessed 17 June 2015]
- Cento A., 2009. *The Airline Industry: Challenges in the 21st Century*. Segrate: Physica – Verleg
- Clemes M., Gan C., Kao T., Choong M.; 2008. *An empirical analysis of customer satisfaction in international air travel*. Available from: http://businessperspectives.org/journals_free/im/2008/IM_en_2008_2_Clemes.pdf [Accessed 26 March 2015]
- Doganis R. 2006. *The Airline Business*. Oxon: Routledge
- Doganis R., 2001. *The Airline Business in Twenty-First Century*. London: Routledge

Dwyer L., Gill A., Seetaram N., 2012 *Handbook of Research Methods in Tourism: Quantitative and Qualitative Approaches*. Cheltenham: Edward Elgar Publishing Limited

Dym B., Egmont S., Watkins L., 2011. *Mission, Vision, and Effective Nonprofit Leadership*. New Jersey: Pearson Education

Emirates, 2010 *Tearing down the other wall*. Available from: http://content.emirates.com/downloads/ek/pdfs/int_gov_affairs/Tearing-down-to-the-other-wall.pdf [Accessed 10 September]

Garcia M., 2014. *Airlines as a Lifestyle Brands May Be the Future of Air Travel*. Available from: <http://skift.com/2014/11/07/airlines-as-lifestyle-brands-may-be-the-future-of-air-travel/> [Accessed 16 May 2015]

General Civil Aviation Authority, 2015. *About GCCA*. Available from: <https://www.gcaa.gov.ae/en/pages/welcomegcaa.aspx> [Accessed 23 March 2015]

Giehl F., LePla J., 2012 *Create a Brand That Inspires: How to Sell, Organize and Sustain Internal Branding*. Bloomington: AuthorHouse

Graham, A., Papatheodorou A., Forsyth P., 2008. *Aviation and Tourism: Implications for Leisure Travel*. Surrey: Ashgate.

Hanlon J.P., 2007. *Global Airlines: Competition in a Transnational Industry*. Oxford: Elsevier.

Holloway, S., 2008. *Straight and Level: Practical Airline Economics*. Hampshire: Ashgate.

IATA, 2013. *World Air Traffic Statistics (WATS) 58th edition*. Available from: <https://www.iata.org/publications/pages/wats.aspx> [Accessed 12 April 2015]

ICAO, UAE, 2015. *Aviation in UAE*. Available from: <http://www.uae-icao.gov.ae> [Accessed 5 September 2015]

Jones R., 2011. Lufthansa steps up fighting to bar Emirates from Berlin. Available from: <http://www.thenational.ae/business/aviation/lufthansa-steps-up-fight-to-bar-emirates-from-berlin> [Accessed 26 March 2015]

- Kapferer J., 2008. *The New Strategic Brand Management: Creating and Sustaining Brand Equity Long Term*. London: Kogan Page
- Knights J., 2015. *Be There Challenge*. Open Sky Magazine
- Knights J., 2015. *Meet the Cabin Crew*. Open Sky Magazine
- Marello P., 2015 *Emirates is the most valuable brand in the World* Available from: <http://www.routesonline.com/news/29/breaking-news/247290/emirates-is-the-most-valuable-airline-brand-in-the-world/> [Accessed 20 February 2015]
- Murray T., *Blending Qualitative and Quantitative Research Methods in Theses and Dissertation*. California: Corwin Press
- Pawar S., 2004. *Data Collecting Methods and Experiences: A Guide for a Social Research*. Elgin: New Dawn Press Group
- Piehler R., Hanish S. & Burmann C., 2012. *Internal Branding – Relevance, Management and Challenges*.
- Ringbeck, J.; Majdalani, F., 2008. *Mastering the Challenges of The Middle East Aviation System*. Available from: www.strategyand.pwc.com/media/file/MiddleEast-Aviation-System.pdf [Accessed 18 April 2015]
- Riva A., 2013 *Emirates Airline is eating all other airlines' lunch but is it here to stay?* Available from: <http://www.ibtimes.com/emirates-airline-eating-all-other-airlines-lunch-it-here-stay-1472912> [Accessed 12 March 2015]
- Shaw S., 2011. *Airline Marketing and Management*. Surrey: Ashgate
- Smith S., 2010. *Practical Tourism Research*. Oxford: CABI
- Strickland, J., 2015. *From Modest Beginnings: The Growth of Civil Aviation in the Middle East*. Available from: <http://hksjmepp.com/from-modest-beginnings-the-growth-of-civil-aviation-in-the-middle-east/> [Accessed 25 August 2015]
- Thompson C., 2015. *World's longest nonstop flight announced*. Available from: <http://edition.cnn.com/2015/08/13/travel/emirates-longest-flight> [Accessed 5 September 2015]

Veal, A. J., 2006. *Research Methods for Leisure and Tourism. A practical guide.* 3rd ed. Harlow: FT Prentice Hall.

Welsing C., 2006. *HRMarketing: New Perspective on Human Resources Management.* Barcelona: Pearson Education Benelux

Wilson G., 2007. *Emirates: The airline of the future.* London: Media Prima

Appendix I: Questionnaire

Questionnaire

Recognition of Airline Brands

My name is Natalya Matur. I am currently student of University of the Algarve in Portugal. I am doing my thesis dissertation in Airline Branding.
My target group are people who travel by plane.

1. Gender:
 - Male
 - Female

2. Age:
 - < 18
 - 18 - 25
 - 26 - 45
 - 46 - 65
 - > 65

3. Academic degree
 - Primary School
 - Elementary School
 - High School
 - College/University
 - Other

4. Occupation: _____

5. Nationality: _____

6. Choose up to 3 reasons you will be guiding before book an airplane ticket:
 - Lowest price
 - Convenient schedule
 - Reputation
 - Frequent Flyer Program
 - Inflight Service
 - Only choose a specific airline
 - Don't choose
 - Other

7. Are you a member of any frequent flyer program?

- Yes
- No

8. How do you normally proceed with your ticket reservation?

- Travel agent office
- On-line (via a travel agent)
- Directly with an airline

9. Please choose the importance of the following for you pre-flight and flight:

	Unimportant	Of little importance	Moderately important	Important	Very important	No answer
Ease of check-in procedure and efficiency of staff	1	2	3	4	5	6
Waiting time in queue for check-in	1	2	3	4	5	6
Efficiency of aircraft boarding	1	2	3	4	5	6
Punctuality of flight departure	1	2	3	4	5	6
Choice of newspapers/magazines at boarding gate	1	2	3	4	5	6
Cleanliness of aircraft	1	2	3	4	5	6
Comfort of seats	1	2	3	4	5	6
Courtesy and helpfulness of cabin crew	1	2	3	4	5	6
Quality of food and drinks	1	2	3	4	5	6
Inflight entertainment	1	2	3	4	5	6
Inflight reading material	1	2	3	4	5	6

10. Please have a look on airlines logo's and uniform's and if you recognize, choose "Yes" and specify airline name.

1.



- Yes _____
- No

2.



- Yes _____
- No

3.



- Yes _____
- No

4.



- Yes _____
- No

5.



- Yes _____
- No

6.



- Yes _____
- No

7.



- Yes _____
- No

8.



- Yes _____
- No

9.

-
-
-
-



- Yes _____
- No

10.

-
-
-
-
-



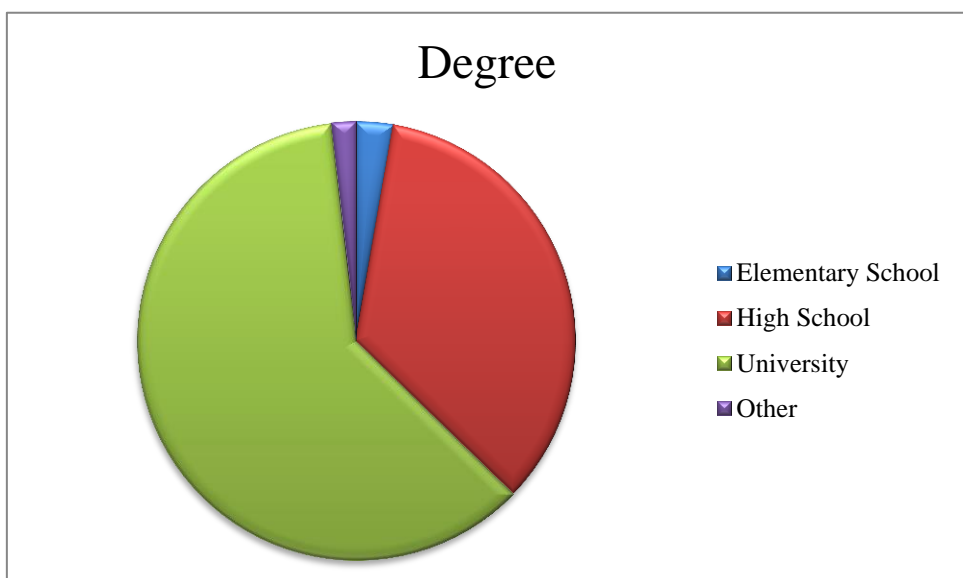
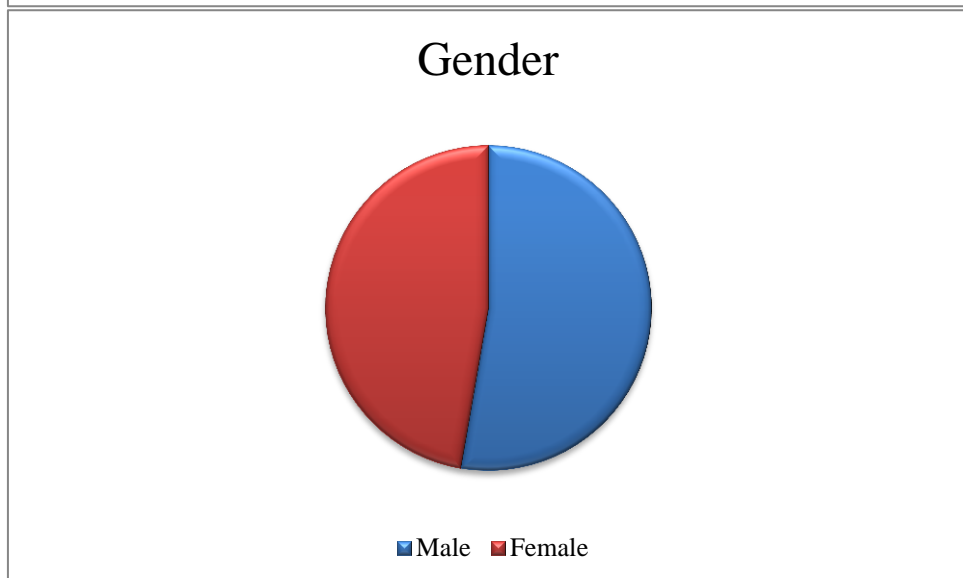
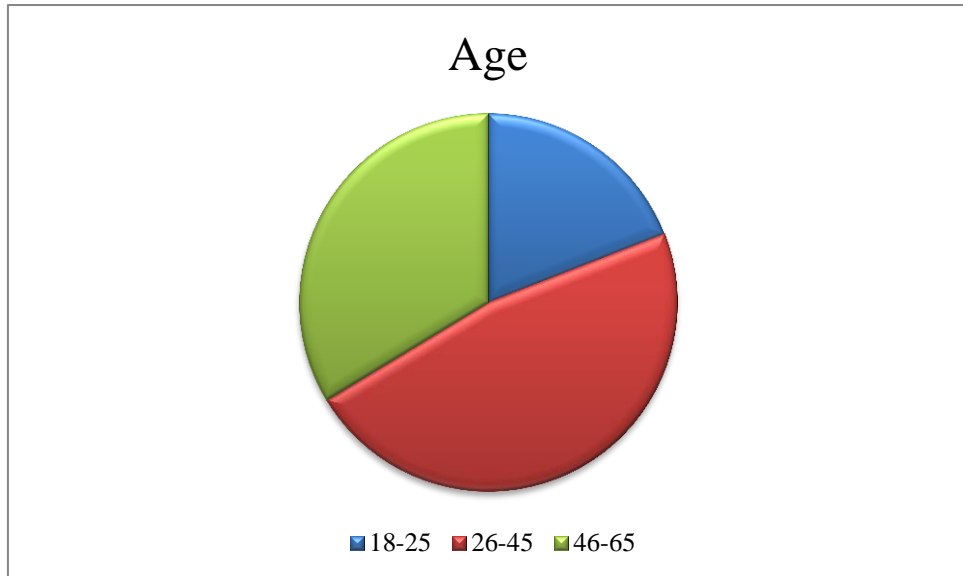
- Yes _____
- No

11.



- Yes _____
- No

Appendix II: Additional figures



Appendix III: Product Positioning Campaigns

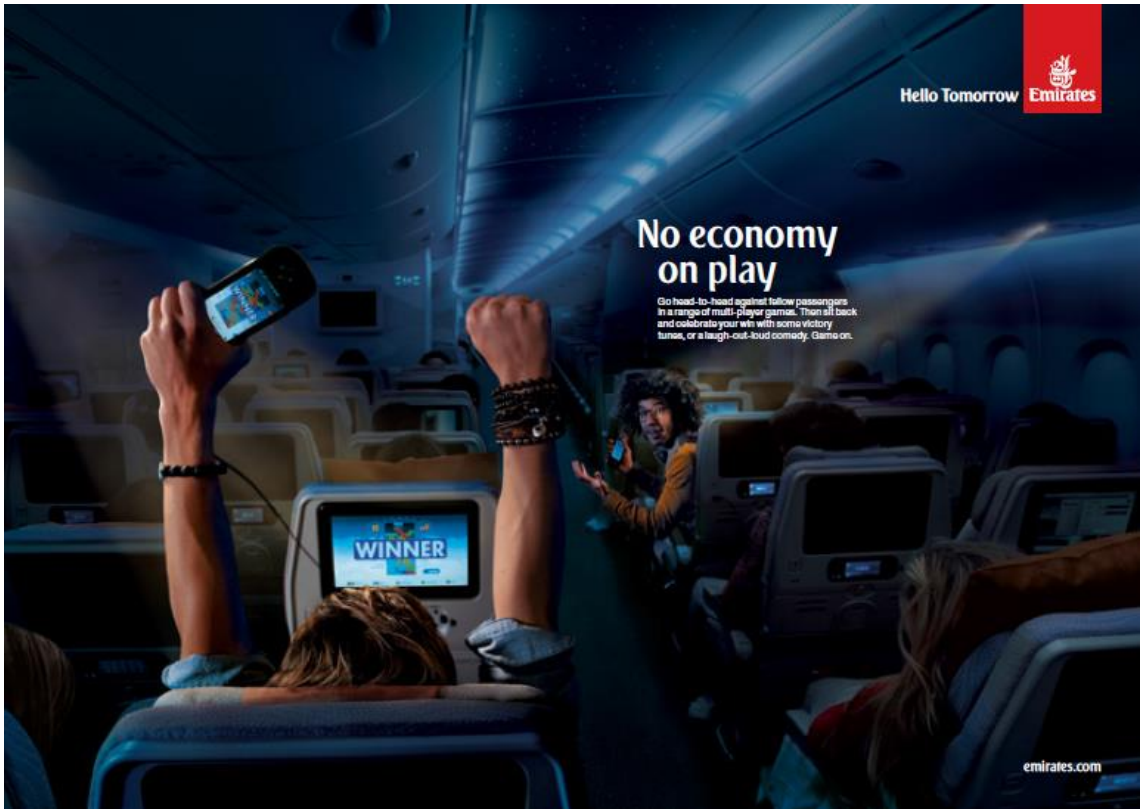




emirates.com

No economy on magic

Wherever you are going, make every journey enchanting. Our friendly cabin crew has toys, treats and special powers to keep the kids entertained—leaving you to relax and enjoy your own magical experience.



Hello Tomorrow 

No economy on play

Go head-to-head against fellow passengers in a range of multi-player games. Then all back and celebrate your wins with some victory tunes, or a laugh-out-loud comedy. Game on.

emirates.com

Hello Tomorrow  Emirates

Prepare for your next big act

Whether you're bound for a stage, a boardroom or a dining room, nothing energises your arrival like a steaming shower. Pamper yourself with Givigli skincare and fragrances in our A380 First Class Shower Spa to get you ready for every occasion.

Hello Tomorrow  Emirates

Make friends from new dimensions

Journey to different worlds with movies and TV, or play the latest video games with new friends on board. Let our inflight entertainment take you places you won't find on a map.

emirates.com

emirates.com

Be driven to capture every moment

Stay focused on what you love and catch that final sunset. Our Chauffeur will stay focused on getting you to the airport, with time to spare.

Hello Tomorrow Emirates

emirates.com

Ease into your next big idea

Do business your way, wherever business takes you. Stay connected with Wi-Fi, grab some refreshments or get comfortable in a quiet area in any of our 22 exclusive airport lounges worldwide.

Hello Tomorrow Emirates

Hello Tomorrow Emirates

Ease into your next delicious escape

Take a moment to relax along the way. Whether it's savouring gourmet cuisine or catching up on the news, the choice is yours in any of our 22 exclusive airport lounges worldwide.

emirates.com



emirates.com

Tomorrow rewards the curious

Broader perspectives, brighter ideas and even deeper loves await those who travel beyond the borders of convention. Here's to helping more people resolve their curiosities.

Fly Emirates to 6 continents.

Hello Tomorrow Emirates

emirates.com

Tomorrow wants to add your colours to the mix

To create a new world, 7 billion heads are better than one. Here's to connecting the dreamers and doers that will shape tomorrow.

Fly Emirates to 6 continents.

Hello Tomorrow Emirates