

Research Based on The Passenger's Perspective to Airline Alliances, The Case of Turkish Airlines, A member of Star Alliance

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Abstract

There is a substantial degree of cooperation between two or more airlines in an alliance. Strategic alliances are formed for a variety of reasons. As a result of airline alliances (e.g., Star Alliance, Oneworld, Skyteam), airlines are able to increase profitability, reduce costs, and expand their flight networks. As part of its commitment to passengers, Turkish Airlines (hereinafter referred to as 'THY') offers flight check-in, baggage handling, a broad network, high-quality catering, in-flight comfort, and on-time departures and arrivals. An assessment of customer perceptions of THY's alliance was conducted to determine whether alliance strategies affected perceived service quality. Travelers who have flown with Turkish Airlines, the flag carrier of Turkey and a Star Alliance member, were surveyed to compare the impact of alliance strategies on service quality before and after joining the alliance. The survey was completed by 147 participants and analyzed using SPSS.

1. Introduction

The airline sector may be described as highly cyclical, extremely vulnerable to external variables, and facing major hurdles to open competition. Additionally, the oligopolistic nature of the majority of air transport markets contributes to the industry's inherent instability: "Equilibrium is difficult to obtain or maintain, and the airline industry can be considered to be in a state of constant flux. In oligopolies, the actions of one competitor have a significant influence on the others, and there is a continuous process of re-adaptation and re-positioning of firms" (Kleymann & Seristö, 2017). This results in barriers to market entry, high initial costs, infrastructure constraints limiting the availability of take-off and landing slots, and large economies of scale for incumbents (Segal, 2022).

Therefore, strategic airline alliances play an important role in the aviation industry. Airlines can engage in more than one common commercial activity through strategic cooperation. Strategic alliances are generally defined as activities of solidarity and resource pooling that occur in various forms between businesses (Koçel, 2010). Although airline alliances are thought to have a positive impact on airlines in terms of resource utilization and increasing market share, the alliance itself may have its own strengths and weaknesses. For this reason, airlines should thoroughly analyze their current strengths and weaknesses while being a member of an alliance and determine which alliance will benefit them the most. In doing so, they will have the opportunity to turn possible crises

into opportunities in the future or to overcome them with less damage and manage risks effectively. All alliance groups have specific strengths and weaknesses, opportunities, and threats (Kanbur & Karakavuz, 2017). As airlines build alliances, they seek economies of scale, scope, and experience to achieve cost efficiencies. Economies of scale occur when the average cost per unit of output decreases as the level of output increases (Evans, 2001).

As a result, airline alliances play a crucial role in delivering value to their customers. These alliances are driven not only by the provision of global access but also by offering extensive global coverage to customers (Iatrou & Oretti, 2016). While the benefits for airlines entering into alliances are well-documented, the potential advantages for customers may not be as immediately apparent (Evans, 2001).

Understanding consumer-perceived value in the complex context of airline alliances represents a substantial effort. Research indicates that each passenger assesses the value of an airline alliance based on their personal valuation of what is important. Nevertheless, an airline alliance can enhance its services by closely attending to what clients consider valuable. Consequently, an airline alliance and its affiliated members can achieve greater customer value, underpinned by positive consumer perception.

In a study, Koçak and Atalık (2019) presented practical results for the aviation industry in understanding customer perceptions and expectations through social media analysis, especially using Twitter data. In their study, they contributed to the marketing field by using social media data, especially

Turkish tweets, to analyse people's opinions, feelings and evaluations of airline services in Turkey. It is obvious that the value that each passenger perceives should be utilized as accurate input on a regular basis to enhance quality services for all participants in the airline alliance, therefore enhancing the reputation for quality.

This study focuses on the perception of alliance member airline passengers about alliance member airlines. Turkish Airlines (THY), Turkey's flag carrier airline, was examined in this context. A doctoral dissertation was undertaken to explore passenger perspectives on alliances before THY joined any such partnership (Gelirli, 2002). Despite a history of unsuccessful alliances, notably its time with the Qualiflyer Group, THY joined the Star Alliance in April 2008.

2. Literature Review

Migdadi (2022) examined consumer perceptions of international networked services in his study, conducting an exploratory analysis through the lens of an alliance example. Study examines the impact of alliance strategies adopted by airlines on service quality. This research topic, the determinants of alliances, and the results and performance of alliance strategies have been investigated on the basis of previous studies. The author underlined that very few authors have researched this subject. He stated that in the previous researches definitions and measurements of quality dimensions is very shallow and narrow scope.

According to Janawade (2013), the success of an airline alliance should be questioned if members of the airline network compromise service quality and ultimately undermine an airline alliance's consumer perceptions of value. Therefore, in order to gain the appreciation of alliance passengers, alliance airlines should not only focus on frequent flyer loyalty programs, enhanced flight and destination network, but should pay more attention and care to provide convenience to airline passengers with quality services.

Orhan (2018) emphasizes the significance of strategic partnerships and resource sharing among airlines to achieve synergies and enhance market access, passenger numbers, and revenues in her study. The paper delves into the concept of synergy within global airline collaborations, specifically focusing on the degree of complementary integration and resource complementarity.

Goh & Uncles (2001) concentrated on how global alliances preserve client loyalty. They asserted that, despite the fact that in some circumstances, customer loyalty programs may be viewed as a tool for achieving objectives, they should not be mistaken for the consistent delivery of greater value based on strong service distinction and quality. In terms of access to departure/arrival intervals, route density, influence on travel agents, and other factors, they said that it cannot be viewed as a substitute for building a strong market presence.

Goh & Uncles (2003) noted in their paper that Alliances are not structurally identical but are seen as the same in the eyes of customers. The key aspects that are most important to end customers are security, baggage handling, direct routes, a few stops etc. These seem like factors and few airline customers could care more about their airline alliance and all they care about is getting from A to B safely and efficiently.

In the view of Ulaga (2001), it is still unclear from a theoretical perspective whether customer value and marketing variables are related. As a result, he examined the topic from

three perspectives and addressed the issue of creating shared value for customers, suppliers, and both buyers and sellers.

In 2004, Weber & Sparks conducted an analysis of airline customer reviews, building upon previous research. They specifically interviewed frequent flyer passengers to examine various types of service failures within an airline alliance context, highlighting the detrimental effects these failures can have on the alliance as a whole. They argued that negative reviews and customer dissatisfaction can lead to a ripple effect of negative word of mouth, subsequently harming customer loyalty and posing challenges for other airlines within the alliance.

Schölkemann (2009) underscored the significance of strategic alliances in the global aviation market, systematically demonstrating their importance through the case study of the Star Alliance. This study elucidates the development of the Star Alliance, which has established itself as the market leader among competing airline alliances.

Furthermore, Zins' research on customer loyalty within airline companies revealed that the intangible aspects of service quality significantly influence passengers' future loyalty behaviors. The study posits that customer loyalty is likely to increase with investments aimed at enhancing the quality of human resources (Zins, 2001).

3. Materials and Methods

As of March 30, 1998, Turkish Airlines (THY) became a member of the Qualiflyer Group, a full decade prior to joining the Star Alliance. The departure from the Qualiflyer Group in 2000 was precipitated by several factors, including the collapse of Swissair's partnership with Delta Airlines, Austrian Airlines leaving Qualiflyer, and the deterioration of relations between THY and both Swissair and the Qualiflyer Group.

Despite THY's unsuccessful attempt to remain in the Qualiflyer Group in 2000, passengers surveyed indicated that their experience with the strategic airline alliance had been positive, particularly highlighting the benefits of on-time departures and quality of service (Gelirli, 2002). This study involved a survey aimed at assessing passengers' perceptions following THY's membership in the Star Alliance in 2008.

In the summer of 2022, THY customers were surveyed online, with 147 respondents participating through Google Forms. The data collected were analyzed using SPSS to ensure the questionnaire's reliability. Frequency tables were generated and analyzed to interpret demographic information, and the average responses to the questionnaire items were also assessed.

The demographic information of the 147 survey participants is presented in Table 1 below:

Among the 147 respondents, 104 were female, and 43 were male. There were 17 participants aged 20-29, 29 participants aged 30-39, and 101 participants aged 40 and over. The nationalities of the participants varied, with the Republic of Turkey having the highest percentage of participants (66.6%). Based on the educational level of participants, it was found that 63 had graduated from university, and 62 had pursued further education after their undergraduate degree.

Table 1. Demographic Information of Participants

Gender	f	%
Female	104	70,7
Male	43	29,3
Total	147	100
Age	f	%
20-29	17	11,6
30-39	29	19,7
40 and over	101	68,7
Total	147	100
Nationality	f	%
TRNC	20	13,6
TR	98	66,6
EU	6	4,1
Azerbaijan	1	0,7
Turkmenistan	2	1,4
German	20	13,6
Total	147	100
Educational Status	f	%
Secondary School	1	0,7
High School	3	2,0
Vocational School	18	12,2
Faculty	63	42,9
Master	32	21,8
PhD	30	20,4
Total	147	100

Reliability Analysis shows how reliable and realistic the answers of the respondents are. Indicating how reliable the answers are is the Cronbach's Alpha statistic, which is calculated as the internal consistency coefficient. Based on the analysis conducted for this survey, the Cronbach Alpha (α) coefficient was found for the internal consistency of the scale items, and the Cronbach Alpha value was found to be $\alpha = 0.92$. Büyüköztürk (2002) considers that the reliability coefficient of $\alpha = 0.70$ and higher is sufficient for the reliability of the test scores.

In Table 2, the average criterion ranges used in the interpretation of the survey results are given.

Table 2. Average Criterion Ranges

Weight	Limitation of Point	Options
1	1.00 – 1.80	Much worsened
2	1.81 – 2.60	Worsened
3	2.61 – 3.40	No changes
4	3.41 – 4.20	Improved
5	4.21 – 5.00	Improved a lot

4. Three Major Strategic Airline Alliances

In bilateral or multilateral agreements known as strategic alliances, the participating airlines work together to achieve a shared purpose while sharing comparable commercial interests (Doganis, 2006). As of right now, the industry is divided into three rival strategic alliances; Star Alliance, Oneworld, and Sky Team, sometimes known as the global airline alliances, which were each established between 1997 and 2001 and now each have twelve or more airline members. Participants in each multilateral alliance choose which airlines to work with and which routes to include in code share agreements. Despite the fact that alliance members frequently work together, they may nevertheless compete. However, certain subgroups of airlines inside the alliances have received antitrust exemption.

Star Alliance; It was founded on May 14, 1997, and it is the world's largest airline alliance group. There are currently 15 core airlines in the alliance, with most of them having agreements with all of the other members and a large number of regional feeder airlines. The Star brand is marketed as a stand-alone product. Members of the Star Alliance are often bound by exclusive agreements that limit their ability to work with airlines not affiliated with the alliance. On a fixed rota at several managerial levels, the alliance is governed by consensus reached by its members during meetings. Several airlines assume a leadership role in certain regions, such as Lufthansa in Europe. In the Star alliance, each member collaborates (albeit to varying degrees) with every other member, making it the most truly multilateral alliance to date. With 27 members today, the Alliance covers 195 countries with a comprehensive network (<https://www.staralliance.com>) (Table 1).

Oneworld can best be defined as two bunch of airlines, one close to American Airlines and the other close to British Airways. At the beginning, a very close Joint Venture type cooperation on North Atlantic lines between the two airlines was design. Contrariness between the regulatory authorities, who feared that a monopolistic situation on the large UK-US market could arise, places severe restrictions on the degree to which the two carriers can cooperate. There were repeated attempts to achieve antitrust immunity for British Airways and American Airlines on the North Atlantic market, which failed mainly due to the US authorities' condition that they would have to give up a fairly large number of slots at London Heathrow airport to open that hub to more competition. Both BA and AA considered this too high a price to pay. As a result, oneworld is the only alliance group where the lead carriers do not enjoy antitrust immunity on the important Europe-US market (Table 1).

Oneworld' s airlines are not as precisely bound by exclusivity circumstances as Star' s airlines. Oneworld management can be described as a democratic alliance that values compromise. Established in 2000 in Vancouver, Canada, Oneworld management company coordinates the communication forum and inter-airline working boards. As of today, Oneworld has a network covering 170 countries with 15 member airlines (<https://www.oneworld.com/>)

Sky Team was formed in 1999 between Air France and Delta Air Lines. It currently has 18 member airlines, with the most active airport being Charles de Gaulle in Paris. The US Department of Transportation (DOT) granted Sky Team

antitrust immunity in January 2002. The aim was to provide benefits to passengers, especially for this rather small group, giving the 4 carriers access to destinations other than their main hubs. Sky Team has a dedicated board of directors of member airlines who meet biannually to provide high-level approval to alliance initiatives and outline goals and strategies to increase alliance strength. This type of governance structure is significantly less formal than Star and oneworld, both of which have private management companies that also include mid-level staff. Skyteam's network consists of 170 countries and 18 airline members (<https://www.skyteam.com>) (Table 1).

Table 3. Three Major Alliances

	 STAR ALLIANCE	 oneworld	 SKY TEAM
Launch date	May 1997	February 1999	June 2000
Slogan	The way the earth connects	Travel Bright	Caring more about you
HQ	Frankfurt, Germany	New York City, USA	Schiphol Airport, The Netherlands
Full Members (August 2022)	27	15	18
Countries served	195	170	170
Destinations	1.300	900	1.036

Source: <https://www.staralliance.com>, <https://www.oneworld.com/>, <https://www.skyteam.com>

With 14.2 billion US dollars in operating profit, Star Alliance is the group with the largest income according to the 2018 statistics (Figure 2). Oneworld and Sky Team come in second and third, respectively, with 10.2 billion and 9.5 billion US dollars. The airline alliance with the most market share in 2018 based on available seat kilometers was Star Alliance, which had 21.7 percent of the worldwide market. (Salas, 2022).

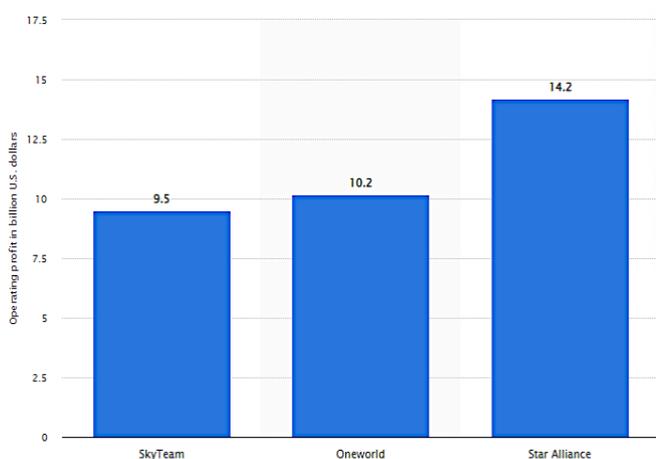


Figure 1. Leading airline alliances in 2018, by operating profit (in billion U.S. dollars)

Source: <https://www.statista.com/statistics/718654/airline-alliances-operating-profit/>

5. Customer Values in Alliances

Economic benefit is often the focus of alliances. Economic benefit is a result of the alliance, it is not the result of the alliance itself (Thendu et al., 2020). In creating an alliance, it shouldn't be the determining factor. Alliance value propositions should begin with what the alliance is delivering to the customer. In other words, a customer is one who is intending to use a service or product. This is often also the person who will pay for it. A customer's value should be defined first. There is no point in pursuing the alliance if there is no value for the customer. Alliances' ability to create value is their ability to use market-based assets to attract and retain customers for their products and services.

In the survey study conducted by Netzer (2018), passengers especially emphasized a total of six benefit dimensions in fulfilling their basic benefit expectations. The expected benefits are as follows:

- safety standard,
- comfort,
- global flight network with flexible reservation options,
- non-stop flight,
- frequent flyer programs and it's benefits,
- personalized care.

Furthermore the perceived customer value is closely linked to the airline brand in the purchasing decision (Boetsch, Bieger, & Wittmer, 2011).

According to Gelirli's study (2002), while alliances appear to predominantly benefit elite class passengers by offering advantages such as a wide variety of routes and improved connection times, they also afford conveniences to the broader passenger base. This accessibility and breadth of options are among the most significant benefits passengers receive, enhancing the overall service standard. Being part of an alliance is perceived by passengers as not only a marker of safe and efficient travel but also a symbol of prestige. Additionally, for some, their national carrier's membership in an alliance may be seen as a testament to their country's progress.

The research conducted by Boetsch et al. (2011) identified a correlation between the quality of an airline's service and its brand identity, suggesting that an airline's brand embodies various service dimensions. Consequently, the perceived value of the airline brand significantly influences customers' purchasing decisions, directly linking to their perceived value of the service. Airlines thus strategically align themselves within customer value clusters based on this perceived value. To stand out, an airline within the 'quality leader' cluster must introduce distinctive offerings, while a cost-efficient airline should focus on optimizing its cost structure. Engaging in strategic alliances presents an effective method for achieving these objectives, facilitating differentiation and competitive advantage.

6. Turkish Airlines, A Member of star Alliances

According to an announcement by the Turkish DGCA on December 9, 2006, Turkish Airlines (THY), the airline recognized for the most significant increase in passenger numbers in Europe through the opening of 24 new international routes, convened a meeting in Istanbul with 21

members of the Star Alliance. This meeting marked the initial step towards membership by signing a preliminary agreement to join the Star Alliance. Following this, THY embarked on a 12-18 month negotiation for full membership, collaborating with numerous airlines, including Lufthansa, United Airlines, and Singapore Airlines, to synchronize its flights. Part of this process involved implementing common tariffs with member countries and establishing IT infrastructure, with THY opting to develop the reservation and sales infrastructure in conjunction with the Star Alliance.

Through the Star Partnership Alliance, THY aimed to provide customers with effortless access to connecting flights globally and to offer tickets at discounted rates, based on agreements among businesses. The anticipated outcome was an increase in customer preference for THY over its competitors and a rise in occupancy rates.

Moreover, by joining the Star Alliance, THY expected to bolster its market position, expand its network, increase revenue and per-unit revenue, and boost business passenger traffic via corporate partnerships. Membership in the Star Alliance was also anticipated to enhance Turkish Airlines' technological infrastructure, offering benefits in marketing, operations, maintenance, ground handling, and labor savings. This would, in turn, elevate aircraft efficiency and lower distribution costs. Consolidating Star Alliance member airlines at specific airports would allow passengers to earn and redeem points across a broader array of airline companies. With these objectives in mind, THY completed its preliminary preparations and joined the Star Alliance in 2008.

THY's commitment to customer satisfaction has been recognized, especially in Skytrax surveys, where it has been distinguished for its quality standards. Turkish Airlines has been named "Best Airline in Southern Europe" for nine consecutive years by Skytrax, alongside receiving accolades for "Best Onboard Catering - Economy Class" in 2010, and "Best Business Class Airline Catering" in 2013, 2014, 2016, and again in 2017. Additionally, it received the "Best Business Class Passenger Lounge" award in 2015 and 2017, and the "Best Business Class Lounge Dining" award for three consecutive years (Star Alliance, 2017).

Joining the Star Alliance has afforded THY numerous advantages, including enhanced network access, seamless travel, transferable priority status, lounge access, and improved benefits within its frequent flyer program (FFP). Becoming a member of the Star Alliance was a strategic decision to solidify its position as a major player in the aviation industry.

7. Result And Discussion

In the study conducted, the investigation was centered on assessing passengers' attitudes toward Turkish Airlines (THY) as well as their awareness and perceptions of airline alliances, with a particular emphasis on THY's affiliation with the Star Alliance. Through an analysis of survey responses from 147 participants, valuable insights were obtained concerning the preference for THY over competing airlines, the relative perception of THY's quality compared to other members of the Star Alliance, and the overall awareness of airline alliances among the respondents.

Table 4. Participants' attitudes towards THY

Whether participants choose THY specifically on their flights	f	%
Yes	107	72.8
No	40	27.2
Total	147	100
Whether THY is of the same quality as other airlines in Star Alliance	f	%
Almost the same	40	27.2
The other Star Alliance airlines are better	9	6.1
THY is better than others in Star Alliance	98	66.7
Total	147	100

107 of the participants stated that they prefer THY especially for their flights and although they stated that THY is better than other airline companies, 40 people said that the quality of THY and other airline companies is almost the same, and 9 people said that other airline companies are better than THY. In the open-ended question asked, the participants who did not choose THY flights say that their flight tickets are very expensive.

Table 5. Airline Alliances

What airline collaborations they have heard of or not heard of	f	%
Oneworld	7	4.8
Star	61	41.5
Sky Team	20	13.6
None	59	40.1
Total	147	100
If They Fly With THY, With Which Alliance Are They Flying?	F	%
Oneworld	3	2.0
Star	60	40.8
Sky Team	0	0
Not knowing	84	57.1
Total	147	100

61 of the participants stated that they knew Star Alliance, 20 of them knew Sky Team, and 7 of them knew Oneworld. 59 participants stated that they did not know any of these alliances. At the same time, 60 of the participants who answered Star Alliance also know that when they fly with THY, they also fly with Star Alliance.

Table 6. Averages of Survey Items

	\bar{x}	SS
Reservation, ticketing, purchase	3.35	0.75
Price Compatibility	2.11	0.94
Airport services	3.11	0.80
The width of the flight network	3.68	0.82
General service quality	3.33	0.82
Language compatibility with service personnel, communication	3.24	0.81
Service standardization	3.12	0.90
Layout in code and flight number	3.20	0.73
Non-stop flight and baggage service	3.03	0.94
Frequent flyer program	3.19	0.91
Lounge use	3.21	0.95
Tariff frequency and variety	3.28	1.11
Customer oriented	3.27	1.02
Ease of finding a seat on flights	3.17	0.92

8. Conclusion

The formation of strategic airline alliances can be driven by numerous factors, including the desire to enter new markets, strengthen existing market positions, reduce operational costs, share risks, and enhance profitability. Nonetheless, the expectations of airline passengers stand as a pivotal consideration. For a strategic alliance to achieve success, it is imperative that it can effectively measure, comprehend, and fulfill the needs of its clientele.

Despite operating within the international arena, airlines have historically faced challenges in establishing a global identity, primarily due to governmental pressures and civil aviation regulations. Since the deregulation movements beginning in 1978, the industry has embarked on a quest for innovative strategies to cater to the demands of a rapidly globalizing market, with strategic airline alliances emerging as a significant solution. Such alliances typically foster a mutually beneficial scenario for the involved airline companies. This study investigates whether passengers derive tangible benefits from the three major strategic alliances, particularly in terms of accessing new and diverse destinations affordably, enjoying a broad tariff structure, experiencing streamlined check-in processes, securing convenient connection times, and making single baggage transactions, all while anticipating an enhancement in service quality. The aim of this research is to ascertain the occurrence of these anticipated outcomes.

Focusing on Turkish Airlines (THY), renowned for its extensive network as a member of the Star Alliance and its status as the carrier with the most destinations worldwide, this study surveys passengers who have flown with THY. Analysis and interpretation of questionnaires distributed to 147 passengers revealed general satisfaction with the quality of service. However, contrary to expectations, passengers reported no perceived benefits in terms of price competitiveness, with some indicating a belief that fares are progressively increasing and exceeding reasonable levels. On a positive note, there was a consensus on the improvement in service quality, especially regarding the breadth of the flight network, and the reservation, ticketing, and purchasing processes. Participants acknowledged the advantages of THY's membership in a strategic airline alliance. Nonetheless, there was ambiguity about the fulfillment of expectations concerning frequent flyer programs.

Ethical approval

Not applicable.

Conflicts of Interest

The authors declare that there is no conflict of interest regarding the publication of this paper.

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