Competitive advantages of global airline alliances

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博士論文内容の要旨

Competitive advantages of global airline alliances

（国際エアラインアライアンスの競争優位）

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Abstract

Over the past several decades, the aviation industry has been reshaped, centering on global alliances, and these have grown exponentially. Global airline alliances have ensured their market presence in the aviation industry. Many airlines have participated in global alliances pursuing strategic and operational merits. Therefore, scholars have focused on issues relative to global airline alliances.

However, several research gaps surrounding global airline alliances exist. It is still unclear whether currently, global airline alliances have competitive advantages surpassing their rivals. Also, although there are three prominent global alliances (e.g., oneworld, SkyTeam, Star Alliance), it is unclear what the specific competitive advantage of each global alliance is. Previous studies have mainly focused on the effects of the global alliance affiliation of airlines using historic data. However, panel data analysis has several limitations. Even panel data analysis could not sufficiently consider various factors affecting the result excepting global alliance affiliation. The result may differ depending on the alliance development stage. Previous studies mainly focused on the early and middle-stage of global airline alliances. Such studies found it hard to reflect on current business situations. Limited data accessibility is another problem. Airline performance data is recognized as confidential business information and, as it is related to national and public security, the data is only available if it is voluntarily offered. On the other hand, it can be said that study of alliance affiliation as a defensive move is relatively neglected. Although airlines have participated in global alliances pursuing operational merits, they also seek the defensive effect of avoiding competition with strong rivals by cooperating with them through alliance affiliation. Many previous studies have pointed out that relevant comprehensive and novel studies are rare.

Considering these research gaps, this thesis aims to shed light on the current competitive advantages of global airline alliances versus their rivals. To achieve its research goals, based on a resource-based view, this thesis carried out three types of quantitative and qualitative cross-sectional performance data analysis between the global alliance group and its non-alliance rival group, and also among the three alliances. This thesis has estimated the existence of competitive advantages from subject groups' performances. The first analysis is mainly based on the supply side using comprehensive airlines' performance data. Mann-Whitney U tests between financial performance (operating revenue), traffic (passenger volume, RPKs, load factor) and other aspects of performance (efficiency) of airlines participating in alliances and non-alliance airlines were performed using 604 data, as well as Kruskal-Wallis H tests of the three alliances; oneworld, SkyTeam, and Star Alliance. As a result, alliance members' financial and traffic performances were found to be better than non-alliance airlines. There were no significant differences between alliance groups and non-alliance groups on alternative performances, and also among the three

alliances on all the performances. Therefore, this thesis concludes that, currently, global airline alliances have only a financial competitive advantage among possible competitive advantages on the supply side.

The second analysis is focused on the demand side using user-generated data. A hybrid text mining analysis was adopted as this section's method. Frequency tests, Mann-Whitney U tests, and Kruskal-Wallis H tests were performed using 6393 ordinal and word-of-mouth (WOM) data. As a result, the degree of passengers' perceptions of alliances was found to be low, the non-alliance group outperformed the alliance groups, and there were no significant differences between alliances on service rating and sentiment score. Therefore, this thesis concludes that currently, the non-alliance group has competitive advantages derived from the demand side.

The third analysis is mainly focused on the quality of strategic communications of global airline alliances as a novel method for measuring competitive advantages. In this section, this thesis assessed the differences in the quality of strategic communication between the three leading alliance groups (oneworld, SkyTeam, and Star Alliance) and a non-alliance group. Comprehensive content analysis was implemented using the letters of chief executive officers (CEOs) of 46 airlines. This thesis found that the non-alliance group has more ideal CEO letters than the alliance groups, and the main topics and quality of CEO letters of alliances differed. Therefore, this thesis concludes that currently, the non-alliance group and oneworld have a competitive advantage related to their strategic communication.

Through the findings, the following theoretical contributions are expected. First, this thesis has added knowledge of competitive advantages of current global airline alliances including both supply and demand side. Second, this thesis has suggested comprehensive and novel research methods for measuring the competitive advantages of current global airline alliances. Finally, the findings of this thesis have plentiful insights for various stakeholders in the aviation industry, in particular, managers of global airline alliances and airlines.