

Customer value of the first class product on long-haul flights – A Kano Analysis

Andreas Wittmer, Jannik Wolffson

Abstract

Throughout the last years, airlines reduced first class capacities on long-haul flights or even completely cut their long-haul first class offers (Nicas, 2012). Due to a reduction in demand (IATA, 2010), many premium airlines struggled to afford a top premium offer.

The goal of this study is to investigate the customer value of a long-haul flight in first class cabin. Hereby, the focus lies in identifying drivers for customer satisfaction and to analyse if there are differences in experience of satisfaction among different customer groups.

By conducting a means end analysis, customers' motivation and values were determined. Based on these results, a Kano analysis was designed. The survey was conducted online among more than 100 participants who regularly travel business and first class.

The results show that current first class products do provide attributes that foster satisfaction. Customers perceive certain attributes differently not only according to their product awareness but also in relation to monetary versus status voucher or miles payment.

Key words: Airlines, customer value, means end analysis, Kano analysis, first class

Introduction

Due to the ongoing reduction of first class capacity on long-haul flights, this study is conducted in order to evaluate the extent to which the first class product on long-haul flights is still competitive (Nicas, 2012). This is evaluated by applying the customer value concept with special attention on customer satisfaction. The focus of this study lies in determining excitement attributes of current first class products for first and business class passengers according to Kano's Model of Customer Satisfaction. Additionally, knowledge about factors that influence the perception of different product factors is gained throughout the study in order to prove the reliability of this study. Thus, this study answers the question, which factors motivate customers to pay significantly more for a flight in first class instead of business class.

Literature Review

Customer Value

Analyzing the broad variety of literature that provides different definitions of customer value, different tools and procedures for the measurement and management of customer benefits generating strategic competitive advantages can be identified (Zeithaml 1988, Gale 1994, Woodruff 1997, Day & Crask 2000, Matzler 2000, Payne & Holt 2001, Belz & Bieger 2006). Some see customer value as the value to the customer (Pechlaner/Smeral/Matzler 2002, Huber/Herrmann/Morgan 2001, Matzler 2000, Parasuraman 1997, Woodruff 1997, Gale 1994). Others see it from the company's perspective and define it as customer lifetime value or customer equity (Günter/Helm 2003, Rudolf-Sipötz 2001, Laitamöki/Kordupelski 1997). A

third group understands it as relationship value, which relates to the value of the relationship between customers, suppliers and companies rather than simple transactions (Ravald/Grönroos 1996, Payne/Holt 2001, Kothandaraman/Wilson 2001).

This paper refers to customer value as “The consumer’s overall assessment of the utility of a product based on perceptions of what is received and what is given“ (Zeithaml, 1988, p. 14) and thus focuses on the consumer’s perspective. Graf & Maas (2013) recently highlighted the relation of customer value and customer satisfaction after Payne & Holt (2001) related the customer value theory to the economic utility theory. This theory expects the customer to maximize his satisfaction by maximizing utility while minimizing costs. In this context, the Kano analysis, which will be explained below, is an appropriate tool to investigate customer value. Nevertheless, based on a customer oriented product development, creating and increasing customer value is seen as a key target for product and service development by companies in accordance with the value comprehension of customers.

Figure 1 about here

Data and Methodology

The research process followed recommendations made by previous authors investigating customer value. Thereby, especially the recommendation of Bieger (2002) was followed since he valued the Kano Method as an appropriate way to evaluate the needs and expectations of customers. Furthermore, this method was proposed by Bailom et al. (1996) who emphasized its eligibility to measure the influence of single product components on the product quality and thus also on customer satisfaction. However, Zeithaml (1988) recommended to conduct a means end analysis beforehand in order to learn about the customer’s motives.

The means end analysis was conducted through personal interviews, following the laddering technique, as it was first suggested by Reynolds and Gutman (1988). The goal of this technique is to discover the subjective knowledge of the customer that, combined with emotions, leads to motivation to purchase a product (Kroeber-Riel, Weinberg & Gröppel-Klein, 2009). By continuously asking for the reason of the customer’s decision, the interviewer is able to identify product advantages that are relevant to the customer while discovering his values and needs (Esch, Herrmann & Satter, 2011). Through this pre-study, product attributes that appeared to be relevant to the customers were identified in order to enquire them in the Kano Analysis.

Kano developed his model of customer satisfaction in 1984 as a model that pictures the influence of certain product features on product quality and customer satisfaction (Bailom et al, 1996). As a function of customer expectations and extent to which expectations are met, the Kano model clusters product features into five categorizations:

- Excitement attributes cause satisfaction with the customer when they are available. However, if they are not part of the product, the customer is not dissatisfied since he does not expect these features.

- Performance attributes trigger either customer satisfaction or dissatisfaction depending on their extent of fulfillment. This is why Gregory & Parsa call them “performance needs” and “keys to satisfaction” (Gregory & Parsa, 2013, p. 30). There is a linear relation assumed between customer satisfaction and extent of fulfillment.
- Basic attributes are expected by the customer and required. Without basic attributes, customers are dissatisfied (Gregory & Parsa, 2013). These attributes are that self-evident that customers only recognize them when they are not available.
- Indifferent attributes neither have a negative nor positive impact on customer satisfaction (Gregory & Parsa, 2013). In opposite to the other attributes, indifferent attributes do not influence customer satisfaction.
- To-be-eliminated attributes cause dissatisfaction when being part of the offer. Product management must identify these attributes early in order to ensure customer satisfaction.

The classification is done through a survey where there are two questions to every product attribute. In one question, the customer is asked how he would feel if the feature would be offered, while he is asked in the second question how he would feel if the feature was not offered. From the frequency of the responses, the attribute can be classified according to Table 1. In order to measure the influence on satisfaction and dissatisfaction Berger et al (1993) development the customer satisfaction coefficient. By put all positive response in relation to the negative, a weighted response is evaluated. Thus, also ambivalent responses can be measured and all attributes can be classified into the categories above.

The research, applying the Kano Method, was conducted online. This was preferred over performing the survey at an airport for two reasons. Firstly, the objective was to include first and business class passengers from many different international airlines. Secondly, due to the low density of first and business class passengers at an airport, it was difficult to get in touch with this target group as they spend most of their time at the airport in airport lounges, which were not accessible for research purpose. This is why the survey was published in September and October 2013 on a number of international business travel forums on the internet. A usable sample of 114 respondents was used for the analysis. This sample size does not allow fully representative conclusions, but interesting indications.

Results

Demographic Analysis

Approximately 29% of the respondents were between 31-40 years old, while 26% were between 41-50 years old and 20% 51-60 years old. Furthermore 10% of the respondents were younger than 30 years old and another 10% older than 60 years old. The gender portion of respondents indicates an imbalance in which males take a stronger position with 71%. For that, this sample represents the imbalance between gender in the premium segment.

From the geographic regions that the respondents reside in one could infer that the sample was made-up of an international mix of respondents spanning across several continents, which was expected since data collection took place on different forums online. 40% of the respond-

ents live in Europe, 9% in the United States, 15% in Australia and 2% in Asia while a third of all respondents did not indicate their place of residence. Accordingly, this sample does not represent the segmentation of international premium passengers on long-haul flights on the first sight but on the other hand, the distribution is very much affected by the high amount of non-responses.

Looking at the educational background, the largest group of people attained a graduate degree (42%) while 23% attained an undergraduate degree and only 7% of the respondents did not study. A quarter of all participants held a top management position, 19% in middle management and 17% were self-employed. 27% did not answer this question.

Since this study aimed to investigate the first class product in general and not just one of a specific airline, it was important to include customers from a variety of airlines. Overall, customers from 17 different international airlines took part in the survey.

Approximately 87% were member of a Star Alliance frequent flyer program, 55% member of a One World frequent flyer program and 35% indicated to be member of a Sky Team program, while 62% of all respondents were members of at least two different programs.

The overall travel class flown by respondents was predominantly business (55%) and first class (21%), which was expected and desired as the goal of the study was to question premium cabin passengers. As a consequence of this specific target group, 66% of the respondents stated to usually travel for business purposes while the other 34% were leisure travelers.

On average, the respondents were experienced in flying first class on long-haul flights as 92% traveled first class within the last three years. Furthermore, 59% indicated to have traveled more than five times first class within the last three years and thus are defined as frequent first class travelers.

Additionally the payment method was evaluated as it is a crucial point from the airline point of view for generating revenue. A third of all respondents (33%) usually pay full-fare first class tickets while 34% pay their ticket only by rewards. The other third pays business class fares and either gets upgraded by the airline or uses upgrades from rewards or vouchers. In particular does the purpose of the travel influence the payment method: While 41% of all business travelers pay full-fare, only 18% of leisure travelers do so. On the other hand 54% of the leisure travelers pay their first class flight usually fully by rewards while only 24% of the business travelers do so. The low amount of full-fare payers in first class was identified by airline experts in interviews conducted beforehand as a key issue of the industry that caused many airlines to reduce their first class capacity or completely eliminate it.

However, an investigation on customer's price satisfaction pointed out that in sum, the majority of respondents are satisfied as 34% value the price for their last first class flight as appropriate and 40% as attractive. The Kano Method was to identify key drivers that are of specific importance for customer satisfaction on long-haul first class products.

Kano Analysis

17 product factors were enquired in the Kano Analysis. In order to generate those factors that would be enquired, Kano (1984) recommended to not only talk to customers but also gather information from company side about the positioning strategy, certain product features, and

competitive products. According to this recommendation, the 17 product factors were identified through a means end analysis, interviews with airline representatives as well as through a literature review.

For the means end analysis 12 participants were interviewed. As it was supposed to be only a pre-study the number seemed to be sufficient. All participants were frequent business and first class passengers. Thus, this pre-study represented the target group for the Kano survey.

The means end analysis led to the conclusion that all needs can be summarized under four goals: “pursue own goals”, “experience esteem”, “well-being” and “being able to afford the product”. The most important product utilities appeared to be costs, product- and service quality as well as travel time. Product- and service quality can be further divided into service quality, seat comfort, sleep comfort and hygiene comfort.

Overall 20 means were discovered.

Figure 2 about here

Out of these 20 product attributes that appeared to be relevant to customers, 10 were further investigated in the Kano Analysis. These 10 product attributes were chosen because all of them were first class product attributes only. Thus, the preference of first class over business class products could be investigated. In addition to these 10 attributes identified by customers, another 7 first-class-only product features were identified in interviews with airline representatives and through an analysis of current market offerings. In total, 17 product attributes were analyzed in the Kano Analysis.

Table 2 about here

The data from the Kano Analysis was evaluated on three levels: At first, an overall view was pictured by evaluating all data and including every participant. As a second step, the responses were divided into frequent first class flyers (high product awareness) and less frequent first class flyers (low product awareness). This was to highlight differences in perception with different levels of knowledge about the product. Finally, differences in perception were evaluated between customers who paid full-fare and those who did not pay full-fare, in order to figure out if there were differences on the one hand, and on the other, in what way airlines meet the expectations of full-fare passengers.

Overall View

Looking at all respondents, there are 6 excitement attributes, 1 performance attribute and 7 basic attributes. Though, there are 3 attributes where respondents were predominantly indifferent, which is not surprisingly as there was a high diversity in the overall view.

Especially product attributes that lead to more convenience for the passenger throughout ground handling were identified as excitement attributes. Namely a chauffeur-driven airport transfer, an exclusive first class terminal as well as a chauffeur-driven gate transfer were

stated in the overall perspective to be excitement attributes. Also, product attributes that support recreation on board the aircraft were considered to be excitement attributes: A suite seat that provides the passenger with more privacy, a minibar that makes the passenger be less dependent from flight attendants and also a separate bed, that is currently offered in some Boeing 747-400 by Lufthansa, was considered to be an excitement attribute. All of the evaluated excitement attributes are only offered by a few airlines.

Table 3 about here

Product Awareness

According to Pechlaner et al. (2002), a higher product awareness leads to a change in perception. Thus, former excitement attributes become performance attributes and are later considered to be basic attributes. A separate analysis was conducted in order to highlight these differences. Passengers who travelled more than 5 times in first class within the last 3 years were considered to be experienced.

Research proved that there are differences in perceiving certain product attributes. experienced customers named four excitement attributes while less experienced considered five attributes to be excitement attributes. In particular were larger lavatories evaluated as basic attributes for experienced passengers while less experienced passengers considered them to be an excitement factor.

Table 4 about here

Payment Method

A separate evaluation according to payment methods was done in order to picture the different needs depending on whether a passenger paid full-fare or did not. The comparison was done to name product attributes through which airlines can directly increase customer satisfaction.

It was shown that full-fare payers named less excitement attributes than other respondents did. Furthermore they identified 9 out of 17 attributes as basic attributes while other respondents only named 6. Also, non-full-fare payers turned out to be indifferent towards more attributes than full-fare payers were. Hence, it is assumed that airlines successfully aligned their first class products with their customers who pay full-fare.

Table 5 about here

Discussion and Conclusion

The goal of this study was to investigate customer satisfaction with long-haul first class products. At first, customers motivations to fly first class were evaluated in a means end analysis. Through that, relevant product features were identified which were key for the Kano analysis. Secondly, a survey was conducted using functional and dysfunctional questions based on

Kano (1984) and strongly focussing on first and business class passengers. Weaknesses of the model were eliminated by separately investigating different customer groups.

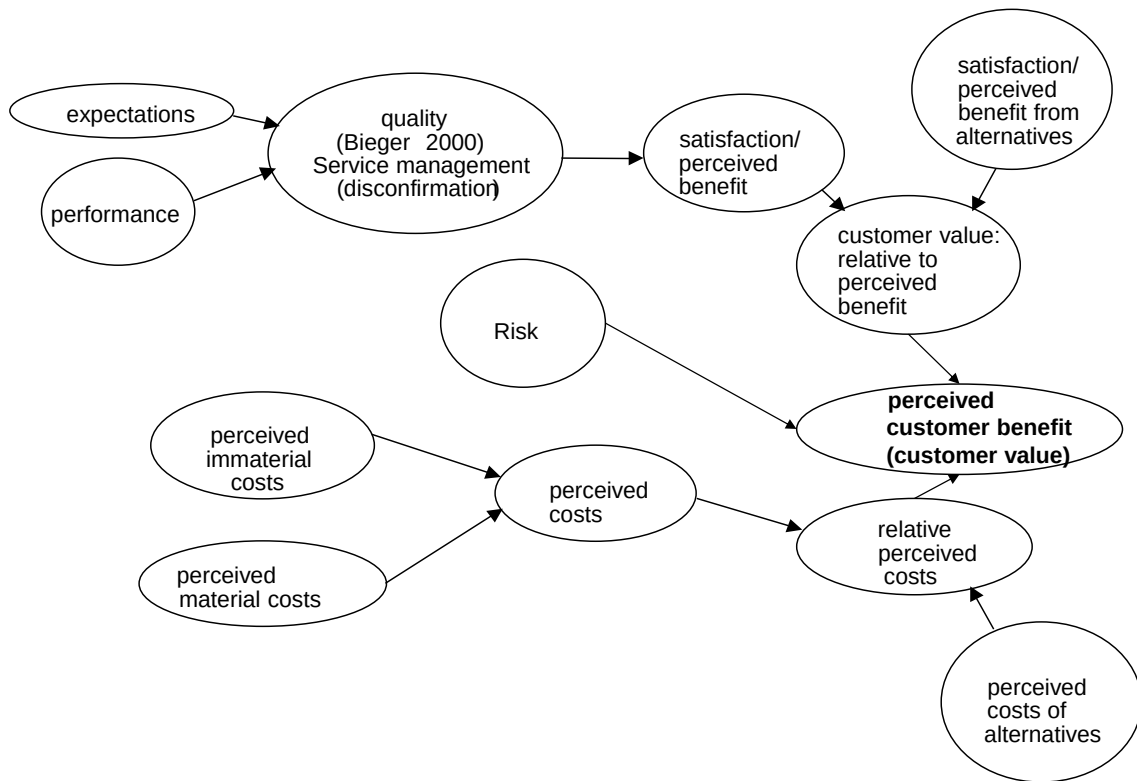
It can be concluded that current first class products do provide excitement for airline passengers. However, the evaluation of attributes may change depending on the level of product awareness and on how much the customer spent for the flight. In especially, this study discovered that non-payers using mileage upgrades or upgrade vouchers or are upgraded due to their status (e.g. Miles and More Hon Circle member) named more excitement factors than full-fare payers. It is proven that first class upgrades do create excitement for frequent travelers and can be assumed to be good lock-in opportunities which influence the loyalty of frequent business class fare payers.

Throughout the research, product features that support convenience in ground handling as well as features that foster relaxation on board were identified as excitement attributes. Customers focus on well-being throughout the value chain of a long-haul first class product. Comparing the results with latest offers in the market, airlines do acknowledge their customers' needs but need to be aware of changing needs over time, as current excitement attributes will soon become performance attributes and the latter will soon be perceived as basic attributes. This rational is supported by the offers of new business classes in A380's of Singapore Airlines and Emirates Airlines, which offer business class services, which are similar to first class offers of other airlines.

Drawing recommendations for the airline industry from this, one must highlight that airlines should manage the expectations of customers and be careful and thoughtful with providing better and better top services as it might not be possible to continuously provide more and better services for the same price.

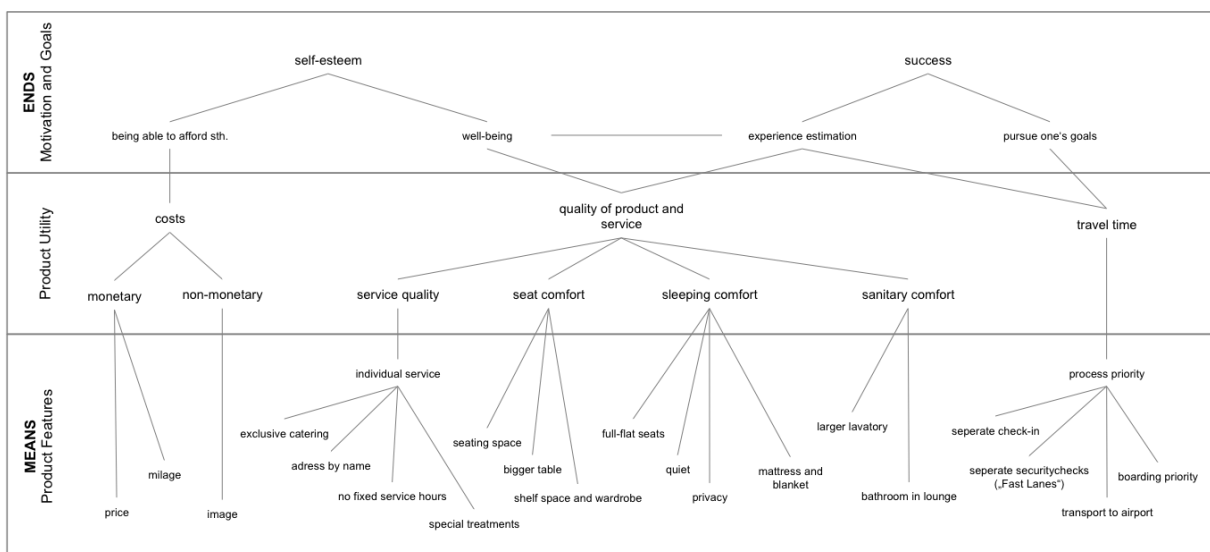
Tables and Figures

Figure 1: Customer Value Framework for Air Transport



Source: Wittmer, Böttger 2009, adapted from Matzler 2000, Bieger 2006

Figure 2: Means End Value Map



Source: Own figure, adapted from Woddruff (1997) and Boetsch (2008)

Table 1: Kano Classification

		Dysfunktional				
		Like it	Expect it	Neutral	Live with it	Dislike it
Funktional	Like it	<i>Questionable (Q)</i>	<i>Attractive (A)</i>	<i>Attractive (A)</i>	<i>Attractive (A)</i>	<i>Must-Be (M)</i>
	Expect it	<i>Reject (R)</i>	<i>Indifferent (I)</i>	<i>Indifferent (I)</i>	<i>Indifferent (I)</i>	<i>Must-Be (M)</i>
	Neutral	<i>Reject (R)</i>	<i>Indifferent (I)</i>	<i>Indifferent (I)</i>	<i>Indifferent (I)</i>	<i>Must-Be (M)</i>
	Live with it	<i>Reject (R)</i>	<i>Indifferent (I)</i>	<i>Indifferent (I)</i>	<i>Indifferent (I)</i>	<i>Must-Be (M)</i>
	Dislike it	<i>Reject (R)</i>	<i>Reject (R)</i>	<i>Reject (R)</i>	<i>Reject (R)</i>	<i>Questionable (Q)</i>

Table 2: Product attributes enquired

<i>Product Attributes</i>	<i>Description</i>
Mileage	First class fares come with higher mileage as business class fares.
Chauffeur-driven transport to airport	Some airlines offer such a service included in the first class fare
Priority processes	First class passengers receive highest priority throughout all ground handling processes
First Class Terminal	Some airlines designed separate terminals exclusively for first class passengers
Chauffeur-driven transport to aircraft	Airlines that offer separate first class terminals offer such transport to the aircraft too
Small cabin size	There are significant differences between cabin size of business and first class. "Small" <16 seats
High flight attendant ratio	Individual service was measured in passenger-per-flight attendant-ratio; functional: 4:1, dysfunctional: 16:1
Access to aisle	Direct access from every seat is the standard in first class and supports privacy and silence
More seating space	This attribute was enquired in relation to business class; functional: 50% more seating space
Suite seat	A seat that separates the passenger from others through walls and even doors
More working space and shelf space	More shelf space and larger table at the seat
Minibar at seat	A variety of beverages and snacks at the seat
Turndown service	Flight attendants turn the seat into a bed with mattress and blanket
Separate bed	Lufthansa offers a separate bed next to the seat in some B747-400
Quiet cabin	Lufthansa used certain elements to first class cabins in A380 more quiet than business and economy class
No fixed service hours	The passenger is "master of time" and can individually choose when to get meals and beverages served
Larger lavatories	First class lavatories are larger than those of other classes; some airlines offer a shower in first class lavatories

Table 3: Evaluation of overall view

<i>Product Attributes</i>	<i>A</i>	<i>O</i>	<i>M</i>	<i>R</i>	<i>I</i>	<i>Q</i>	<i>Classification</i>	<i>Satisfaction</i>	<i>Dissatisfaction</i>
Mileage	4%	18%	58%	1%	19%	0%	M	0,23	-0,77
Chauffeur-driven transport to airport	46%	9%	19%	0%	25%	2%	A	0,56	-0,28
Priority processes	13%	26%	46%	1%	13%	1%	M	0,40	-0,73
First Class Terminal	55%	12%	11%	1%	20%	0%	A	0,68	-0,24
Chauffeur-driven transport to aircraft	48%	9%	8%	2%	33%	1%	A	0,58	-0,17
Small cabin size	21%	18%	24%	4%	31%	3%	I	0,42	-0,45
High flight attendant ratio	18%	24%	35%	2%	21%	1%	M	0,43	-0,61
Access to aisle	14%	27%	47%	1%	10%	1%	M	0,42	-0,75
More seating space	12%	28%	46%	1%	10%	3%	M	0,42	-0,77
Suite seat	48%	4%	4%	8%	36%	1%	A	0,57	-0,08
More working space and shelf space	18%	19%	36%	1%	26%	1%	M	0,37	-0,56
Minibar at seat	46%	3%	4%	4%	42%	0%	A	0,51	-0,07
Turndown service	26%	15%	28%	4%	27%	0%	I	0,43	-0,45
Separate bed	59%	4%	0%	4%	34%	0%	A	0,65	-0,04
Quiet cabin	25%	27%	27%	1%	20%	0%	O	0,52	-0,55
No fixed service hours	31%	10%	31%	2%	27%	0%	I	0,41	-0,41
Larger lavatories	29%	19%	31%	2%	19%	0%	M	0,49	-0,51

Table 4: Evaluation according to product awareness

	High product awareness (n=67)			Low product awareness (n=46)		
<i>Product Attributes</i>	<i>Classification</i>	<i>Satisfaction</i>	<i>Dissatisfaction</i>	<i>Classification</i>	<i>Satisfaction</i>	<i>Dissatisfaction</i>
Mileage	M	0,24	0,77	M	0,20	0,73
Chauffeur-driven transport to airport	A	0,52	0,28	A	0,60	0,24
Priority processes	M	0,35	0,70	M	0,47	0,73
First Class Terminal	A	0,75	0,24	A	0,59	0,22
Chauffeur-driven transport to aircraft	A	0,59	0,18	A	0,54	0,15
Small cabin size	I	0,40	0,45	I	0,39	0,37
High flight attendant ratio	M	0,44	0,68	I	0,40	0,44
Access to aisle	M	0,41	0,74	M	0,43	0,73
More seating space	M	0,42	0,74	M	0,39	0,75
Suite seat	I	0,46	0,08	A	0,59	0,07
More working space and shelf space	I	0,33	0,49	M	0,40	0,64
Minibar at seat	A	0,56	0,09	I	0,37	0,04
Turndown service	I	0,45	0,46	I	0,36	0,40
Separate bed	A	0,62	0,05	A	0,62	0,02
Quiet cabin	M	0,49	0,57	O	0,57	0,52
No fixed service hours	I	0,39	0,45	I	0,41	0,32
Larger lavatories	M	0,41	0,53	A	0,60	0,47

Table 5: Evaluation according to payment method

<i>Product Attributes</i>	Full-payer (n=38)			Non full-payers (n=73)		
	<i>Classification</i>	<i>Satisfaction</i>	<i>Dissatisfaction</i>	<i>Classification</i>	<i>Satisfaction</i>	<i>Dissatisfaction</i>
Mileage	M	0,27	0,89	M	0,19	0,68
Chauffeur-driven transport to airport	A	0,53	0,37	A	0,57	0,21
Priority processes	M	0,30	0,76	M	0,44	0,69
First Class Terminal	A	0,68	0,29	A	0,68	0,22
Chauffeur-driven transport to aircraft	A	0,59	0,24	A	0,56	0,14
Small cabin size	M	0,34	0,50	I	0,42	0,40
High flight attendant ratio	M	0,37	0,68	M	0,46	0,55
Access to aisle	M	0,30	0,78	M	0,48	0,72
More seating space	M	0,37	0,74	M	0,43	0,75
Suite seat	I	0,42	0,03	A	0,58	0,10
More working space and shelf space	M	0,24	0,61	M	0,44	0,54
Minibar at seat	A	0,51	0,05	I	0,49	0,08
Turndown service	M	0,37	0,55	I	0,46	0,39
Separate bed	A	0,58	0,05	A	0,68	0,03
Quiet cabin	O	0,57	0,62	O	0,50	0,51
No fixed service hours	I	0,39	0,45	I	0,43	0,39
Larger lavatories	M	0,43	0,65	A	0,53	0,43

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