

High-Flying Strategies: An In-depth Examination of Jetstar's Competitive Positioning and Challenges in the New Zealand Aviation Market

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Abstract. This research thoroughly examines Jetstar's competitive stance and obstacles in the New Zealand aviation sector as an Australian low-cost carrier. Since its founding in 2003, Qantas Airways subsidiary Jetstar has grown to become one of the biggest low-cost carriers in the Asia-Pacific area. After providing an overview of Jetstar's operations and business, the article delves extensively into the macro environment of the corporation by examining its PESTLE (Political, Economic, Socio-Cultural, Technological, Legal, and Environmental) components. In the meantime, Air New Zealand and Virgin Australia—two of Jetstar's main rivals in the New Zealand market—are the subject of a competitive analysis. The article lists Jetstar's advantages, disadvantages, opportunities, and threats in a SWOT analysis. Finally, based on an in-depth analysis of the key challenges faced by Jetstar, including intense market competition, limited route network, and economic and political risks. In response to the analysed scenario, the article makes some recommendations, including expanding the route network, adopting sustainable practices, and maintaining efficient operations. Ultimately, the research in this article provides strategic guidance for Jetstar in the New Zealand market to optimise its market share, address competitive challenges and enhance customer satisfaction.

Keywords: Jetstar; Low-cost airline; Competitive positioning; Market competition; Strategic analysis.

1. Introduction

Jetstar Airways is a low-cost airline owned by Australia's Qantas Group, founded in 2003 and headquartered in Melbourne. As one of the biggest budget airlines in the Asia-Pacific area, Jetstar is known for offering affordable flights and flexible services. With a network covering Australia, New Zealand, Asia, and the Pacific Islands, the airline aims to provide travelers with convenient travel options and a quality customer experience [1]. Jetstar's business model focuses on cost efficiency and customer satisfaction, meeting the needs of different travelers by offering a diverse range of paid options and digital services. In a highly competitive market, Jetstar continues to optimize its route network and operational efficiencies, aiming to become the most popular low-cost carrier in the region.

Low-cost carriers have become an important part of the aviation industry in recent years as the global economy grows and tourism flourishes, and Jetstar Airlines is one of the leaders, having become one of the biggest budget airlines in the Asia-Pacific area since its inception in 2003 [1]. Jetstar's success lies in its low-cost operating model and expanding domestic and international route network, and diversified service offerings [2]. However, as competition in the market intensifies, Jetstar faces stiff competition from other inexpensive airlines, like AirAsia, Peach, and Tigerair, in addition to full-service airlines like Virgin Atlantic and Air New Zealand. Therefore, an in-depth study of Jetstar's market positioning, service strategy, and competitive environment is important for understanding the development of the low-cost airline market and recommendations for the way forward.

This research first introduces the background of the low-cost airline market and the development history of Jetstar Airlines. It then analyses Jetstar's service offerings and market positioning to explore how it maintains its attractiveness in a competitive market. Then, it assesses the key challenges and opportunities faced by Jetstar and the effectiveness of its coping strategies. Finally, Jetstar's successes are summarised, and recommendations are made for its future development. This study will use the



case study method of secondary data analysis and comparative analysis. Firstly, a research case is constructed by describing in detail the historical development, service offerings, market positioning, and competitive strategies of Jetstar Airlines. Secondly, Jetstar's business model and market performance will be analysed in depth using publicly available financial reports, market analysis reports, and academic literature.

The purpose of this study is to examine the market strategy and service model of Jetstar Airlines, to analyse how it maintains its competitiveness in an intensely competitive market, and to assess the sustainability of its development strategy. The significance of the study is to provide strategic guidance to participants in the low-cost airline market, to provide policymakers with references for industry development, and to provide consumers with more choices and better services.

2. Jetstar Oceania Market Analysis

2.1. Analysis of PESTLE

Jetstar is a major player in the airline industry and operates in a complex and volatile macro-environment. The PESTLE framework provides a comprehensive view of the external factors that affect Jetstar's operations. Political factors such as government regulations, trade agreements, and political risks affect customer choice and flight schedules, affecting the airline's profitability and reputation [2]. Travel restrictions and border closures imposed by governments worldwide in response to COVID-19 have significantly impacted Jetstar's international operations, drastically reducing flight schedules and passenger numbers [3].

Economic factors, including global economic stability, exchange rates, and fuel prices, can have a direct impact on Jetstar's revenues and cost structure [2]. The global financial crisis of 2008 led to a sharp decline in consumer travel spending, which impacted Jetstar's revenues, forcing the airline to reconsider its expansion plans and focus on cost-cutting measures [4].

Technological advancements in aircraft design, digitization, and automation play a crucial role in improving operational efficiency and customer experience [5]. Jetstar has actively embraced digital innovation with the adoption of self-check-in kiosks and mobile boarding passes that allow passengers to book flights, check in, and obtain boarding passes via their smartphones to streamline the check-in process [2], reduce waiting time, and improve the overall customer experience.

2.2. Analysis of SWOT

In terms of Jetstar's internal factors in the Oceania market, Jetstar's strengths in the Oceania market lie primarily in its low-cost operating model, which has enabled Jetstar to offer competitive fares and attract a large number of consumers in a price-sensitive market [6]. In addition, Jetstar has high brand awareness and a good reputation in the region, earning it the support of many loyal customers. Through efficient operational management, Jetstar can effectively control costs and thus maintain good profitability [1]. To increase its client base and market penetration, it has also formed strategic alliances with other airlines and travel agencies [6].

Looking at external factors, Jetstar also faces some challenges in the Oceania market. Given that its route network is smaller than that of some of its rivals (Fig 1&2) [7, 8], Jetstar may find it more difficult to draw in clients who are seeking a greater variety of destinations. In addition, as a subsidiary of the Qantas Group, Jetstar may be limited in its decision-making and resource allocation, which may affect its independence and flexibility [2].

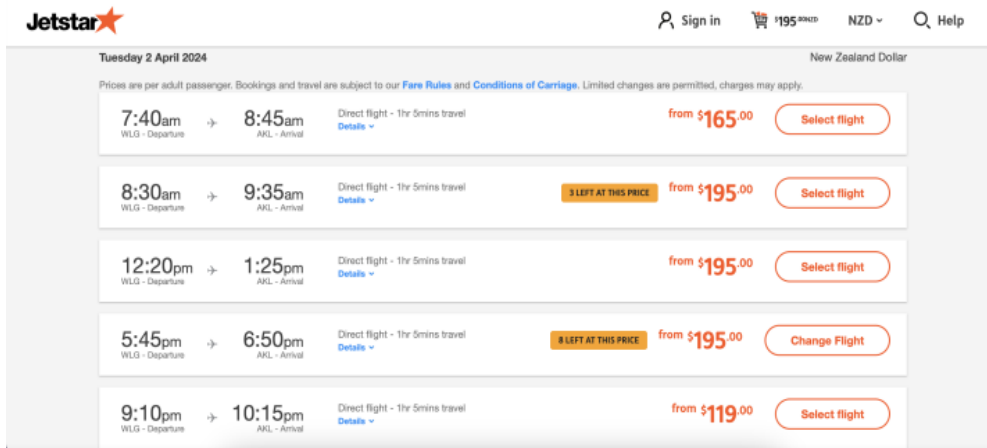


Figure 1. Jetstar Airways 4.2 Wellington to Auckland Flight Schedule

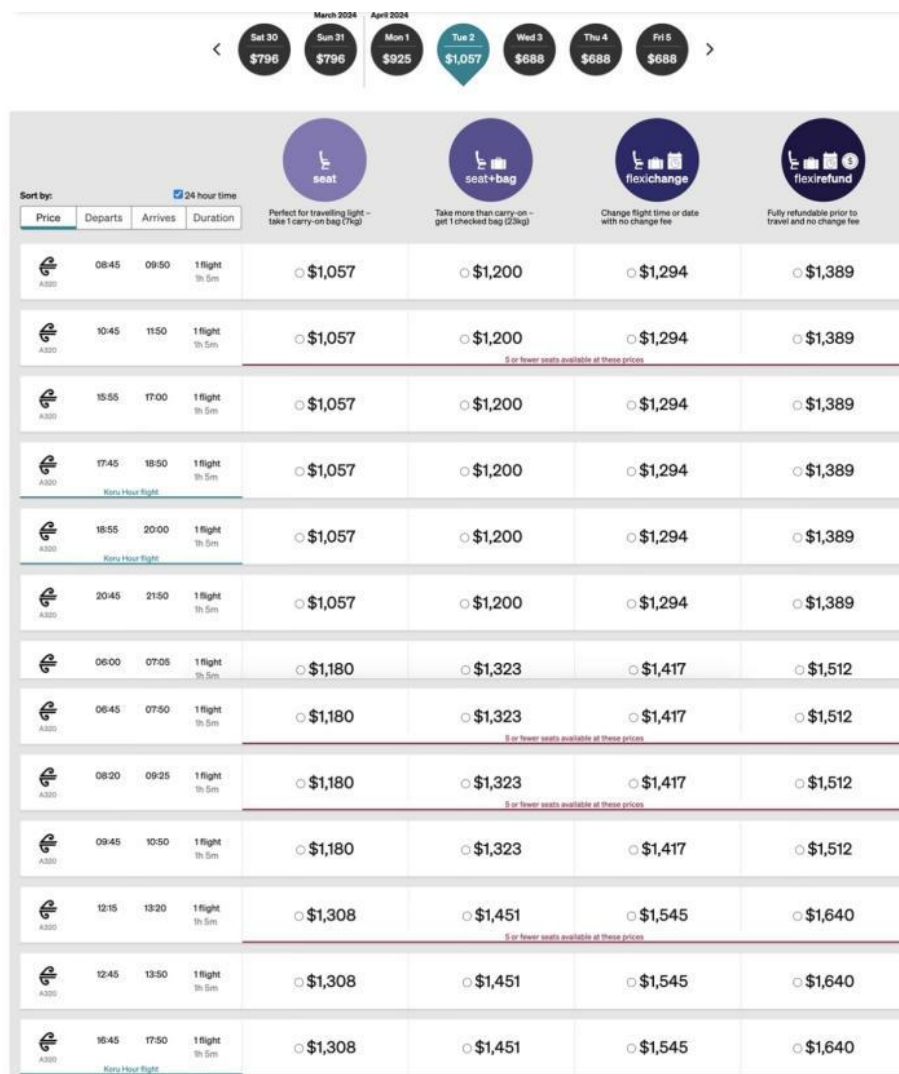


Figure 2. Air New Zealand 4.2 Wellington to Auckland flight schedule

Despite these challenges, the continued growth of the Oceania aviation market and increased consumer demand for low-cost flights provide opportunities for Jetstar to grow. The company can increase its market share by expanding its route network and improving service quality. However, other airlines like Virgin Australia and Air New Zealand are fierce rivals of Jetstar, which poses a threat to its market position. In addition, economic volatility and uncertainty may affect consumers'

willingness to travel and spending power, adversely affecting Jetstar's revenue and earnings. For example, in the aftermath of COVID-19, Jetstar introduced super-low fares to boost tourist spending (Fig 3) [7], which in turn boosted Jetstar's revenues.

July 2020						
MON	TUE	WED	THU	FRI	SAT	SUN
		1	2	3	4	5
		From \$34 [*] Each	From \$39 [*] Each	From \$49 [*] Each	From \$55 [*] Each	From \$49 [*] Each
6	7	8	9	10	11	12
From \$39 [*] Each	From \$39 [*] Each	From \$39 [*] Each	From \$39 [*] Each	From \$49 [*] Each	From \$55 [*] Each	From \$44 [*] Each
13	14	15	16	17	18	19
From \$39 [*] Each	From \$34 [*] Each	From \$39 [*] Each	From \$39 [*] Each	From \$39 [*] Each	From \$39 [*] Each	From \$39 [*] Each
20	21	22	23	24	25	26
From \$34 [*] Each	From \$34 [*] Each	From \$34 [*] Each	From \$29 [*] Each	From \$34 [*] Each	From \$39 [*] Each	From \$39 [*] Each
27	28	29	30	31		
From \$34 [*] Each	From \$34 [*] Each	From \$34 [*] Each	From \$29 [*] Each	From \$34 [*] Each		

Figure 3. Jetstar Airways July 2020 Wellington to Auckland fares

2.3. Competitor Analysis

Air New Zealand, as the national airline of New Zealand, has long held a dominant position in the country's domestic market, as well as on routes between New Zealand and Australia. With a large and modern fleet, the airline boasts a well-developed route network that spans all continents, offering passengers a wide array of flight options and flexible scheduling. This extensive global reach, coupled with the airline's established brand recognition, has solidified its strong reputation in the region [8].

Air New Zealand is known for its high-quality service, especially on long-haul flights with a range of premium amenities and comfort options. The airline's commitment to sustainability and innovative customer experience initiatives, such as the Skycouch in its Economy class, have further enhanced its market appeal [8]. However, Air New Zealand's fare structure is generally higher than that of low-cost carriers like Jetstar. This price difference can be a deciding factor for budget-conscious travelers, particularly on short-haul routes where service differentiation is less pronounced.

3. Jetstar Asia Market Analysis

3.1. Analysis of PESTLE

Political stability in the Asian region is crucial for the aviation industry. Uncertainties in the political environment, such as political tensions, policy changes, or regional conflicts, can hurt Jetstar's operations [9]. In 2014, political unrest in Thailand, a key destination in Jetstar's network, led to a temporary decline in tourism and travel demand, affecting Jetstar's flight occupancy and revenues in the region [10]. In addition, government regulatory policies on the aviation industry, including safety standards, environmental regulations, and market access restrictions, can also affect Jetstar's business development and strategic planning [2].

The socio-cultural diversity of the Asian region requires Jetstar to remain flexible and sensitive in its service design and marketing. Consumption habits, travel preferences, and cultural differences in different countries and regions significantly impact the demand and expectations for air services [11]. Understanding and adapting to these socio-cultural factors will help Jetstar to fulfill its customers' needs better and enhance its competitiveness in the marketplace. Jetstar has customised its in-flight services to cater to different dietary preferences across Asia, offering a range of meal options including vegetarian, halal, and Asian cuisine to meet the cultural and religious needs of its passengers [7].

Laws and regulations have a significant impact on Jetstar's operations in Asia. Aviation safety standards, consumer protection laws, labour laws, and tax policies all require strict compliance by

Jetstar [12]. In addition, international aviation agreements and bilateral agreements determine Jetstar's market access and air transport rights in each country [13]. In 2016, Indonesia introduced a regulation requiring airlines to provide a minimum level of service, which impacted low-cost carriers such as Jetstar. This regulation resulted in Jetstar adapting its service offerings and pricing strategy in the Indonesian market [14].

Increased environmental awareness and focus on sustainability have required Jetstar to adopt an environmentally friendly approach to its operations [15]. Reducing carbon emissions, minimising noise pollution, and effectively managing waste are the environmental challenges facing Jetstar [2]. Complying with environmental regulations and taking proactive measures to minimise environmental impact is critical to maintaining the company's socially responsible image and long-term sustainability [16]. Jetstar's participation in the Carbon Offset Programme, which allows passengers to offset the carbon dioxide emitted by their flights by contributing to environmental projects in Asia, such as reforestation programs and renewable energy projects, is in line with the growing environmental awareness among consumers [1].

3.2. Analysis of SWOT

In terms of Jetstar's internal factors in the Asian market, Jetstar has gained a competitive advantage in the Asian market with its low-cost operating model, attracting a large number of travelers looking for value for money [17]. As part of the Qantas Group, Jetstar enjoys a high level of brand awareness in Asia, which has helped to earn the trust and loyalty of its customers [13]. Jetstar has expanded its market coverage and enhanced the diversity of its services through partnerships with other airlines and travel businesses [2]. Jetstar's more limited route network in Asia than its competitors may affect its ability to attract more customers [6]. As a subsidiary of the Qantas Group, Jetstar may be overly reliant on its parent company for branding, funding, and resources, which may limit its flexibility to grow independently [6].

Looking at external factors, economic growth and the expansion of the middle class in the Asian region are driving increased demand for air travel, providing Jetstar with expansion opportunities [2]. Advances in online booking, mobile services, and aviation technology provide Jetstar with opportunities to enhance operational efficiency and improve the customer experience [5]. The Asian low-cost carrier market is highly competitive, with competitors such as AirAsia and Peach posing a threat to Jetstar. Factors such as regional political tensions and economic volatility may affect passenger demand and the stability of the airline industry [9]. The cost of aviation fuel has a significant impact on Jetstar's operating costs, and fluctuations in fuel prices may adversely affect its profitability [4].

3.3. Competitor Analysis

Peach Aviation Limited is a low-cost airline based in Osaka, Japan. It began operations in 2011 and was the first true low-cost airline in Japan [18]. Peach Aviation is known for offering affordable flights and minimalist services, operating mainly short-haul domestic (Fig 4&5) [18] [7] and some international routes. Peach's route network covers major cities within Japan, such as Tokyo, Osaka, and Naha, and also extends to some major cities in Asian countries, such as Seoul, Hong Kong, and Taipei. Peach Airlines attracts a large number of young and budget travelers with its simple fare structure, convenient online booking system, and stylish brand image [18]. However, as a low-cost carrier, Peach offers relatively simple services, with extras such as baggage check-in, meals, and seat selection usually requiring additional fees. In the highly competitive Asian low-cost airline market, Peach Aviation strives to maintain its market position and attract more passengers by continuously optimizing its operational efficiency, expanding its route network, and enhancing its brand image.

The screenshot shows the Peach Aviation booking interface. At the top, the navigation bar includes 'peach', 'Create Peach profile', 'Login', and 'Check/Edit Profile Info'. Below this is a progress bar with steps: Search, Select Your Flight, Passenger Details, Baggage / Seat, Options, Final Confirmation / Purchase, and Finish. The main heading is 'Select your flight'. The route is '1 stage' from 'Osaka (Kansai)' to 'Tokyo (Narita)'. Passenger details are 'Adult x 1', 'Child x 0', and 'Infant x 0'. A 'Refine your search' button is present. The 'Departure Date' section shows a calendar with '2024/4/9 (Tue)' selected, with a fare of '¥3,590 ~'. Other dates and fares are listed: 4/6 (Sat) ¥7,490 ~, 4/7 (Sun) ¥7,490 ~, 4/8 (Mon) ¥5,990 ~, 4/10 (Wed) ¥5,990 ~, 4/11 (Thu) ¥5,990 ~, and 4/12 (Fri) ¥5,990 ~. A 'View lowest price in the calendar' button is also visible. The 'Select your flight and fare type' section contains a table with two flight options:

Flight	Aircraft	Dep	Arr	Time required	Promotions and more	Airfare
MM311	A320neo	07:30 Osaka (Kansai)	09:00 Tokyo (Narita)	1Hour35Min(s)		¥3,590 ~ 3 seats left at this price
MM319	A320	17:50 Osaka (Kansai)	19:25 Tokyo (Narita)	1Hour35Min(s)		¥6,690 ~ 3 seats left at this price

Figure 4. Peach Aviation 4.9 Osaka to Tokyo Fare

The screenshot shows the Jetstar Airways booking interface. At the top, the navigation bar includes 'Jetstar', 'Sign in', 'JPY', and 'Help'. The main heading is 'Tuesday 9 April 2024'. The currency is 'Japanese Yen'. Three flight options are listed:

7:15am KIX - Departure	8:40am NRT - Arrival	Direct flight - 1hr 25mins travel Details	from ¥4,480	Select flight
11:55am KIX - Departure	1:25pm NRT - Arrival	Direct flight - 1hr 30mins travel Details	1 LEFT AT THIS PRICE from ¥8,080	Select flight
6:30pm KIX - Departure	8:05pm NRT - Arrival	Direct flight - 1hr 35mins travel Details	6 LEFT AT THIS PRICE from ¥6,480	Select flight

Operated by: Jetstar Japan
Prices quoted are per adult passenger and exclusive of airfare related surcharges, fees and taxes which will be shown in the Flights Summary. Unless otherwise stated, fares are non-refundable, limited changes are permitted and charges apply. View our Fare Rules.

Figure 5. Jetstar Airways 4.9 Osaka to Tokyo Fare

Compared to Jetstar, Peach Aviation focuses on the Japanese domestic market and selected East Asian routes (Fig 6) [18], while Jetstar's route network covers the wider Asia-Pacific region, including Southeast Asia, Australia, and New Zealand (Fig 7) [7]. Peach Aviation is an independently owned and operated Japanese low-cost carrier, while Jetstar is a subsidiary of Australia's national airline, Qantas Group. subsidiary, which gives Jetstar a possible advantage in terms of brand recognition and resource support. Although both companies offer basic low-cost airline services, Jetstar offers more cabin options and additional services such as business class and in-flight entertainment systems on certain routes [1].



Figure 6. Peach Aviation Routes

All airports	Bangkok - BKK	Kuala Lumpur - KUL	Darwin - DRW	Okinawa (Naha) - OKA
USA	Krabi - KBV	Penang - PEN	Gold Coast - OOL	Osaka (Kansai) - KIX
Honolulu - HNL	Phuket - HKT	Japan	Hobart - HBA	Tokyo (Narita) - NRT
Singapore	China	Asahikawa - AKJ	Launceston - LST	Indonesia
Singapore - SIN	Haikou - HAK	Kochi - KCZ	Melbourne (Tullamarine)	Bali (Denpasar) - DPS
Philippines	Wuxi - WUX	Miyako (Shimojishima)	Melbourne (all airports)	Jakarta - CGK
Clark - CRK	Australia	Okinawa (Naha) - OKA	Newcastle - Port Stept	Surabaya - SUB
Manila - MNL	Adelaide - ADL	Osaka (Kansai) - KIX	Perth - PER	Cambodia
Thailand	Brisbane - BNE	Tokyo (Narita) - NRT	Sydney - SYD	Phnom Penh - PNH
	Broome International / Indonesia	Malaysia		

Figure 7. Jetstar Airways Routes

Peach Aviation and Jetstar each have their strengths in the Asian low-cost airline market; Peach has managed to attract a large number of domestic travelers with its in-depth understanding and focus on the Japanese market. Jetstar, on the other hand, utilizes its extensive route network and the support of the Qantas Group to serve a wider range of international and trans-regional travelers [2]. For Jetstar, understanding Peach Aviation's market strategy and service characteristics will help it compete and position itself more effectively in the Japanese and East Asian markets. At the same time, Jetstar can continue to leverage its network strengths and brand presence to attract a wider range of Asia Pacific passengers.

4. Jetstar's Asia Pacific Advantage

The Asian market has a larger population base and higher economic growth rates than the Oceania market. This provides Jetstar with significant market potential, especially in fast-growing regions such as Southeast Asia and China. However, the Asian market is much more competitive, with not only many local low-cost carriers but also many full-service carriers competing for customers [13]. This requires Jetstar to be more flexible and innovative in its pricing, service, and marketing strategies. In terms of consumer needs, the needs and preferences of Asian consumers may differ from those of

the Oceania market. For example, Asian travelers may be more focused on ease of flying and frequency of flights, while Oceania travelers may be more focused on comfort and quality of service. Operating costs in Asian markets may be affected by several factors, including airport fees, fuel prices, and labor costs, which Jetstar will need to manage effectively to maintain its low-cost advantage [2]. The regulatory environment in Asia varies from country to country, with different requirements for airline operations, safety standards, and market access, and Jetstar will need to adapt to these regulatory environments to ensure smooth operations in each market [12].

5. Jetstar Development Recommendations Based on Comparative Analysis

To remain competitive and capitalize on growth opportunities in the highly competitive Asian market, Jetstar should consider some strategic measures. First, Jetstar can meet the growing market demand by expanding its route network, increasing flight frequencies, and exploring new destinations [19]. Secondly, enhance service quality and customer experience to attract and retain customers by optimizing customer service and providing more value-added services [20]. A flexible pricing strategy, combined with dynamic pricing and promotional activities, will help Jetstar respond to market competition and changing demand [19]. Enhanced brand marketing, especially promotional activities on digital platforms, will increase Jetstar's visibility in the Asian market. In addition, focusing on sustainable development and adopting environmentally friendly measures will help Jetstar build a green image in the market [15]. Strengthening partnerships and working with local airlines and travel businesses will expand sales channels and offer more diverse travel products [2]. Lastly, it will closely monitor changes in market trends and consumer demand to make timely adjustments to its strategies while enhancing staff training and development programs to improve service levels and maintain an efficient operations team. Through these measures, Jetstar will be able to better adapt to the challenges and opportunities of the Asian market and thus achieve sustainable growth.

6. Conclusion

This research provides an in-depth analysis of Jetstar's competitive positioning and challenges in the New Zealand aviation market. The PESTLE analysis provides an understanding of how Jetstar operates in the macro-environment, with particular emphasis on the significant impact of economic and technological factors on its performance. The SWOT analysis reveals Jetstar's strengths, weaknesses, opportunities and threats. The competitor analysis shows that although Jetstar has an advantage in terms of price, it still faces stiff competition from its major competitors such as Air New Zealand and Peach.

The limitation of this research is that the analysis of competitors may not be comprehensive enough due to the limitation of data acquisition, and future research can further delve into the impact of other potential competitors on Jetstar. In addition, rapid changes in market conditions and consumer preferences may affect the results of the analysis in this research.

In terms of future growth, Jetstar can optimize its share of the New Zealand market, address competitive challenges, and improve customer satisfaction through strategies such as expanding its route network, adopting sustainable practices, and maintaining efficient operations. As the Asian market grows and competition intensifies, Jetstar will need to continue to innovate and adapt its strategies to stay ahead of the fierce competition in the market. Future research could further explore Jetstar's performance in the Asia-Pacific market and how it is responding to changing market demands and the competitive landscape.

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