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THE IMPACT OF COVID-19 PANDEMIC ON THE MARKETING
STRATEGIES OF TURKISH AIRLINE COMPANIES

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ABSTRACT

The COVID-19 outbreak that emerged in Wuhan, China at the end of 2019 has affected the whole world. As the outbreak turned into a pandemic, it has negatively affected the aviation industry among many other sectors. During this period, the airline transport companies have attempted to minimise their economic losses by differentiating their marketing strategies. This study defines and compares the marketing strategies implemented by the companies in the Turkish aviation industry before and during the COVID-19 period using semi-structured qualitative research technique and provides recommendations.

Keywords: COVID-19, Marketing strategies, Aviation industry, Airline marketing**Jel Codes:** M1,M3COVID-19 PANDEMİSİNİN TÜRK HAVA YOLU İŞLETMELERİNİN PAZARLAMA
STRATEJİLERİNE ETKİSİ

ÖZ

2019 yılı sonunda Çin'in Wuhan kentinde ortaya çıkan COVID-19 salgını, tüm dünyayı etkisi altına almıştır. Salgının pandemiye dönmesiyle birlikte birçok sektörü olduğu gibi havacılık sektörünü de olumsuz yönde etkilemiştir. Hava taşımacılığı yapan işletmeler bu süreçte pazarlama stratejilerini farklılaştırarak ekonomik kayıplarını en az düzeyde tutmaya gayret etmiştir. Bu çalışmada yarı yapılandırılmış nitel araştırma tekniği ile Türkiye'deki havacılık sektöründe yer alan işletmelerin COVID-19 pandemisinde önce ve pandemi sürecinde uyguladıkları pazarlama stratejileri ortaya koyularak karşılaştırma yapılmış ve önerilerde bulunulmuştur.

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1. INTRODUCTION

The COVID-19 pandemic, which emerged in Wuhan, China and spread throughout the world, severely affected the aviation industry among other industries, causing the airlines to lose revenue while increasing certain costs. This led the airlines to adopt specific survival strategies, with many either announcing bankruptcy or laying-off some employees. During this period, the airlines began to develop survival-oriented strategies instead of targeting more revenue or competitive advantage (Karakavuz, 2020: 3574-3575).

The impact of the outbreak started to affect the economic activities, foreign trade and tourism in Turkey as of mid-March 2020, which deepened and spread throughout the entire economy. Subsequently, the travel restrictions, sharp decreases in consumer and producer confidence indices, decreased government budget revenues, increased spending, increased unemployment, unpaid leaves and decreased household incomes created changes in sectoral demand (Adıgüzel, 2020: 192-193).

The food retailing industry suffered the least economic damage during this period, or in some cases, it was not affected by the COVID-19 pandemic at all and rather increased its profitability; the aviation industry, meanwhile, sustained the largest economic impact (Coşkun and Çepni Şener, 2020: 28). The COVID-19 pandemic turned into a global crisis and aviation became one of the most affected industries. Periods of crisis, which could be caused both by internal and external factors, may pose a risk of extinction for businesses. However, these crises may also be turned into opportunities with the right management. Although businesses may have plans in place to anticipate and prevent internal crises, they may fail to find solutions to external environmental crises such as epidemics or earthquakes (Dondurucu and Çetinkaya, 2020: 328).

Throughout the history of the world, the aviation industry struggled with several incidents, such as terrorist attacks, economic crises and global diseases, that had a negative impact and reduced the demand for air travel. Examples of these instances include the Oil Crisis in 1973, the Gulf War and the Asian Financial Crisis, the 9/11 terrorist attacks in 2001, the SARS virus that emerged in China in 2003, the collapse of the real estate market in the United States in 2008 and the global economic uncertainty. The COVID-19 pandemic, however, almost entirely halted the global aviation industry, including the air traffic in Turkey (Hopancı et al., 2021:448-450).

Before COVID-19, the most significant disease outbreak in terms of the impact on air traffic was the SARS virus that emerged in 2002. According to the International Air Transport Association, at the height of the SARS outbreak in May 2003, the monthly revenue passenger kilometres of Asia Pacific airlines were about 35% lower than their pre-crisis levels (IATA, 2021). The COVID-19 pandemic has taken this parameter far beyond these values and is currently leading the aviation industry into uncertainty. Starting 24 March 2020, several measures were implemented such as quarantining the incoming passengers, enforcing partial travel restrictions and closing the borders, and many airlines reached the point of completely halting their flights.

The COVID-19 pandemic has significantly affected air transport and changed the global airline experience immensely (Sun et al., 2020: 1). It is well known that air transport plays a critical role in the spread of infectious diseases (Albers and Rundshagen, 2020: 1). Governments worldwide introduced travel bans, quarantines, and shutdowns, to enforce social distancing measures in an effort to prevent faster spread of the disease and maintain the efficiency of the national health systems (Sun vd., 2020: 1). Despite heavy travel restrictions and quarantine policies enforced by governments, the COVID-19 pandemic, which is believed to have started around January 2020, spread rapidly to almost all countries around the world (WHO, 2021). Consequently, the number of infected cases reached 203 million and the number of deaths reached 4 million by August 2021. As of May 2020, the mobility of airline passengers was greatly restricted, especially for international air passengers. Travel restrictions enforced during the pandemic contributed to the decrease in the demand for air travel and lead to the cancellation of several flights (Sun et al., 2020).

The travel restrictions enforced as a part of the pandemic measures caused a decrease in air traffic throughout the world, which led to thousands of job losses in the industry. Combined with the fact that the flights almost reached a halt, this caused a severely negative impact on the aviation industry (Hopancı et al., 2021:448-452).

2. EFFECTS OF THE COVID-19 PANDEMIC ON THE AVIATION INDUSTRY

The COVID-19 pandemic significantly impacted businesses worldwide, resulting in notable changes to their marketing strategies. As consumers increasingly relied on digital channels, businesses adjusted by prioritizing online advertising, social media engagement, and e-commerce initiatives. With physical stores closing, companies expedited their digital transformation efforts. Effective customer support and communication became paramount, leading to improvements in online customer service, chatbot integration, and self-service options. To succeed in a changing business environment, businesses adapted their marketing strategies by emphasizing empathy, virtual experiences, and enhanced customer support.

In the airline industry, marketing strategies had to be adjusted due to travel restrictions and safety concerns. Airlines focused on clear communication by providing up-to-date information about travel regulations, health protocols, and flight schedules. To rebuild consumer trust, they prioritized health and safety measures, flexible booking policies, targeted essential travel segments, offered promotional deals, and embraced digital transformation. Partnerships and improved customer communication and support were also emphasized to adapt to the new travel landscape. These adjustments in the airline industry, including clear communication, safety measures, flexibility, and targeted promotions, played a crucial role in restoring consumer confidence in air travel.

Companies are expected to develop strategies and implement new practices by considering the changing consumer behaviours to adapt to the existing situations, continue their operations or at least survive. Therefore, before exploring the marketing strategies adopted by the airlines during the pandemic, we should look into certain studies conducted on airlines during COVID-19 which analysed consumer behaviours in this period.

The pandemic affected consumer behaviour. Certain consumers were not motivated to engage in online shopping before the pandemic; however, the fear of human interaction during the pandemic led to a change in their behaviour and made online shopping more appealing to these consumers (Aydın and Doğan, 2020: 99).

There have been studies investigating how airlines managed social media platforms in terms of marketing communications during the pandemic. Facebook, Twitter and Instagram accounts of Turkish Airlines and Emirates Airlines were studied to investigate how they used social media and how they managed this process in terms of marketing communications, and it was observed that they mostly shared announcements, destinations, news, sponsorships and sales improvement campaigns in an effort to generate public relations (Çalışkan and Duygun, 2021:26).

Coşkun and Çepni Şener (2020) performed a quantitative comparison of the corporate Facebook accounts of BİM, a food retail chain and Pegasus Airlines, and stated that the corporate Facebook page of Pegasus Airlines predominantly focused on competitive advantage and health factors as sales benefits, including posts with COVID-19-related content as well as posts with more emotion-oriented content.

Emirates Airlines implemented a practice, which could be considered an initiative that supports the air traffic, for people who were afraid to go to the hospitals during the pandemic. The company announced that free in-house COVID-19 PCR tests would be offered to travellers before the flights, which would allow the customers to fly safely (Çalışkan and Duygun, 2021:26).

Continuing the marketing communication activities during periods of crises and uncertainty, sending informative messages and offering instant feedback to customers create a positive

perception in the target audience (Semercioğlu and Abay, 2021: 11). Conscious use of this approach by companies can give companies a competitive advantage.

A study conducted by Semercioğlu and Abay (2021) demonstrated that measures implemented by airlines to eliminate health-related concerns and the consumers' confidence in the airlines have a positive effect on brand loyalty. Airlines aimed a standard and high-quality approach in specific steps of their service processes. However, this approach was replaced by hygiene and different safety procedures when the COVID-19 pandemic emerged in 2020. The results of the analysis performed in the study demonstrated that measures aimed at minimising travellers' health-related concerns have a positive and significant effect on customer loyalty.

It has been observed that the implementation of measures for eliminating customers' health-related concerns during this period increases the customers' confidence in the airlines and positively affects brand loyalty. While service and quality standards once used to be the main focus of the industry, this period marked a shift towards taking health-related precautions and focusing on hygiene which positively enhanced customer loyalty (Semercioğlu and Abay, 2021).

A study conducted by Dondurucu and Çetinkaya (2020) compared the Instagram use strategies of the national airlines of America and England and Turkish Airlines (THY) during the pandemic. The results of their study revealed a change in the pre- and post-crisis social media marketing communication strategies of all three companies. The research model developed by the authors examined the brand strategies implemented by these companies during the crisis. They demonstrated that all three companies quantitatively increased their efforts towards informing the customers and creating an image after the crisis as compared with the pre-crisis period. Furthermore, it was observed that there were also efforts towards generating a joyful/fun/positive relationship between the brand/company and the potential target audience through creating a connection with the consumers during the COVID-19 period. These efforts included delivering/donating medical supplies to the people and companies in need, sharing socially conscious posts such as applauding the healthcare workers, transparently informing the target audience/fulfilling responsibilities in relation to the crisis by providing information on the cancelled flights/offering solutions and sharing positive messages with the public.

There have been many studies in the literature on the effects of the pandemic on several different industries; however, the number of studies investigating the impact of the pandemic on the aviation industry is relatively limited. Based on the literature review conducted by Saban and Trabzon (2021), several studies have examined the impact of the COVID-19 pandemic on the aviation industry. These studies have focused on aspects such as the financial situation of airlines, the obligations of airlines towards each other within the same country, and the support provided by the government to the airlines during the pandemic (Vinod, 2020; Abate et al., 2020). Some authors contributed to this topic by studying the impact of COVID-19 on the aviation industry in North America, Europe and Pacific Asia (Dube et al., 2021), including impact on stock market performance (Carter et al., 2021), environmental impact (climate change, etc.) of COVID-19 on the aviation industry (Keskin and Ercoşkun, 2021); as well as the measures taken in Turkish civil aviation industry (Macit and Macit, 2020), meanwhile, Adıgüzel (2020) and Soylu (2020) investigated the macroeconomic impact of the COVID-19 outbreak on the Turkish economy.

The literature review reveals that several authors have studied the impact of the COVID-19 pandemic on the aviation industry from the diverse aforementioned angles. We believe that this study, which defines and compares the pre- and post-COVID-19 marketing strategies of the Turkish aviation industry, will contribute to the literature on airline marketing practices. It is believed that the research will fill knowledge gaps and enrich our understanding of marketing practices in a post-pandemic world by providing insight into the specific challenges and strategies implemented by airlines. For this purpose, this study analysed the strategies implemented by the businesses between March 2020 and June 2021.

3. MARKETING STRATEGIES IN AIRLINES

The aviation industry is susceptible to the risks posed by many uncontrollable factors such as war, the threat of terrorism, epidemics, global economic crises and high fuel prices (Kiracı, 2021:1562). The airline transport industry has been struggling with an unprecedented financial challenge since the announcement of the pandemic (Şen and Erdağ, 2021:443). However, the aviation industry has also played an important role in the deployment of medical and international aid (Akca, 2020:60).

Since the implementation of the U.S. Airline Deregulation Act in 1978, the global air transport industry has experienced remarkable growth and transformation. The ever-increasing demand and the changing ecosystems have led to the emergence of new business models such as low-cost airlines (Ko, 2016: 54).

In the post-deregulation period, the profitability of enterprises began to be determined by market conditions and airlines significantly changed their marketing strategies. Businesses, in general, are focused on aggressive policies to expand their market shares and reduce their costs. The marketing strategies of airlines after the deregulation are as follows:

a) Computer reservation systems: In the age of technology and especially after the deregulation, airlines have started to use computer technology for both booking and codeshare purposes (Şen ve Erdağ, 2021:453). Approximately 70% tickets are sold through a computer reservation system; the rate of ticket sales through the computer reservation system was less than 40% before the deregulation; however, today, this number has reached 70% (Yılmaz, 2020: 157).

THY— which has a wide flight network across our country, offers different pre- and post-flight services to classified customer groups and falls into the traditional national and major airline status—could be considered an example of Full-Service Carrier. Simultaneously, THY is a member of the Star Alliance, of which full-service carriers are also members. Full-service carriers use the computer reservation system along with the Global Distribution Systems (Durmuş et al.,2022:28) This system both creates an electronic database and provides electronic ticketing. This system, also used by tourism agencies and companies, expands the server network, and offers a competitive advantage to the airlines that use the system (Yüksek, 2013; Durmuş et al., 2022: 28).

During COVID-19, people who preferred to spend more time at home due to both mandatory isolation and disease-related concerns became more likely to use online systems than before. It is obvious that the use of online platforms increased even more during and after COVID-19. To turn this into a competitive advantage, airlines must develop online sales and marketing channels and adapt to changing environmental conditions and consumer behaviours (İbiş, 2020: 96).

b) Travel agencies: Travel agencies provide services through the computer reservation system. Airlines pay a certain amount of commission to travel agents for the tickets they sell. It is estimated that approximately half of the leisure travellers and a quarter of business travellers have no specific preference concerning the airline that they would like to fly with. Therefore, travel agencies may have a major role in influencing consumer decisions (Yılmaz, 2020: 157).

İbiş (2020) studied the impact of the COVID-19 pandemic on travel agencies and based on the findings obtained from travel agency officials who participated in the study, he offered some recommendations regarding how travel agencies can start their recovery processes. In this context, he stated that once the COVID-19 threat is eliminated, developing products and services that are appealing to different consumer groups and turning tourism into a year-round activity would accelerate the recovery process. He also stated that booking cancellations from European countries could be turned into postponed bookings with state-guaranteed vouchers, and this practice would protect both the travel agencies and the consumers. He further recommended that travel agencies should continue customer dialogues during this period and facilitate

cancellations and refunds. This would increase customers' loyalty to businesses in the long term. Simultaneously, he emphasised that when travel agencies face a change in customers' consumption habits, they should take quick action to gain a competitive advantage, and they should closely monitor changing travel behaviours and position themselves accordingly.

c) Frequent-flyer programme: Customer loyalty programmes, which aim to increase sales in the air transport sector, create an emotional connection between customers and the business, thereby encouraging them to buy services (Nebati vd. 2021:137). Major airlines have developed a frequent-flyer programme, a reward system wherein frequent travellers can accumulate miles based on their ticket status and travel distance, to ensure continued business with frequent flyers. These points allow passengers to benefit from many services such as discounted or free tickets, service class upgrades, more baggage allowance, quick check-in and complimentary pre-flight food and beverages. Frequent-flyer programmes are an important incentive to build customer loyalty, especially for business travellers (Yılmaz, 2020: 157-158).

All businesses that are focused on customer loyalty apply to the frequent-flyer programme. The goal of this programme is to create customer loyalty and increase sales by rewarding frequent flyers, for instance, THY offers certain privileges to their frequent flyers with their Miles&Smiles programme. These programmes offer some benefits to the airlines as well; for instance, the airlines can learn more about the consumption trends of the customers and create special campaigns for specific customer segments, which would help them build a competitive advantage over their competitors. Moreover, they can increase their sales thanks to the emotional connection created with their new customers (Nebati vd. 2021: 97-123).

d) Codeshare: Codeshare is a marketing method wherein two airlines reach a mutual agreement and use the same flight code in their flights. This way, the airlines can expand their flight network and appeal to a wider market. For instance, THY and Air Europa signed a codeshare agreement on 1 October 2016. As per this agreement, Air Europa can sell tickets for İstanbul-Madrid route through their own airline code and flight number; however, the passengers will fly with THY. Similarly, THY can sell tickets from Madrid to six destinations with its own flight codes. As evident from the THY example, codeshare allows both airlines to sell tickets for destinations to which they do not have flights. If there is a codeshare agreement for a flight, the passengers must be notified at the time of booking (Yılmaz, 2020: 158).

e) Interactive marketing agreements: While codeshare covers contracts, responsibility, connection and accounting, interactive marketing agreements are simple collaborations based on mutual interests. Low-cost carriers and point-to-point carriers often do not engage in code sharing for a variety of reasons. They have more limited flight networks compared with the code sharing businesses; therefore, they appeal to a small market. These airlines are aware of the importance of expanding the flight network and increasing their market shares; therefore, they can engage in flexible arrangements with other airlines that complement their business models. An interactive marketing agreement is signed by two or more airlines to develop a relationship where each carrier agrees to promote or advocate other carriers. The most simplified form of interactive marketing agreement is when a passenger is encouraged to visit another carrier's website to get to an end destination (Yılmaz, 2020: 158-159).

f) Hub-and-spoke service: In the post-deregulation period, airlines switched to a hub-and-spoke system to increase the occupancy rate of the aircraft and reduce costs. Some airlines selected some airports as centres (hubs) and they began gathering passengers at a single hub and transported them (spoke) to their destinations (Şen and Erdağ, 2021: 441).

This practice allows airlines to operate in more city-pairs at almost the same cost. For example, a carrier needs a minimum of 10 flights to serve 10 city-pairs in a point-to-point route system; however, in the hub-and-spoke system, they can offer up to 100 city-pairs with 10 flights. The hub-and-spoke system has its advantages as well as disadvantages. The passengers may miss their connecting flights at the transfer point, problems may arise when the luggage is loaded to

the other plane, or a delay in one of the flights may cause delays on other flights as well (Yılmaz, 2020: 159).

g) Using passenger planes in cargo transportation: Karakavuz (2020) performed a SWOT analysis of the aviation industry during the COVID-19 period when there was a decrease in domestic and international flights, which also led to an increase in environmental uncertainties for airlines. According to this analysis, one of the first strengths and opportunities was the fact that empty passenger airliners could be used for cargo deliveries, which would open up a revenue stream (Cam, 2019: 66). The air cargo market turned into a solution for airlines that suffered cash losses during this period. This also allowed them to offer medical supply delivery services (Hopancı et al., 2021: 452).

h) Establishing a subsidiary new airline business: Airlines gain a competitive advantage by establishing low-cost subsidiary airlines (Durmuş et al., 2022: 28). THY established its subsidiary AnadoluJet to protect its market share, which decreased after the deregulation in 2003, and take precautions against the increasing risk of competition, thereby managing to meet the requirements of the competition (Cam, 2020: 158).

i) Digital marketing: As the customers and businesses did not have the option of face-to-face communication during the pandemic, the businesses used social media accounts for customer requests, complaints, and questions, which made effective use of social media more important for businesses. Airlines that use their social media accounts more actively are able to inform the customers about flights, and share arrangements and precautions regarding the environment and conditions within the context of COVID-19 measures. This is believed to increase demand in a positive way (Nebati et al., 2021: 130-132).

4. RESEARCH OBJECTIVE AND METHODOLOGY

This study conducts a comparative analysis of the marketing strategies of the airlines before the COVID-19 pandemic and during the pandemic. The study sample comprised 12 airline companies licensed by the General Directorate of Civil Aviation in Turkey. Three of these are cargo-only airlines, while one airline operates regional transportation (SGHM, 2021). One of these airlines has not been operational for the last two years since 2020, has not been able to pay the wages and other benefits to its employees and is struggling with a financial crisis. Five of these airlines were contacted. Semi-structured qualitative research technique was used in the study. As the study universe is small and limited in number, conducting a survey would be inconsequential; therefore, in-depth interviews and literature screens were used in the study. The pre-determined study method was face-to-face interviews; however, due to the COVID-19 pandemic, the interviews were conducted via e-mail and telephone.

Research Questions

- What were the airline companies' marketing strategies before the pandemic?
- What marketing strategy did the airline companies implement during the pandemic?

4.1. FINDINGS

4.1.1. MARKETING STRATEGIES OF AIRLINES BEFORE THE PANDEMIC

Business A

We interviewed the interactive marketing communications manager of Business A on 30 April 2021. Business A established low-cost sub-brands and created major product diversity before the pandemic. The company official stated that they decided to use social media platforms as a result of the feedback they received from regional directorates and based on their market research. They launched communication efforts on both domestic and international social media platforms based on the market needs.

They stated that as each medium has its own unique dynamics, they implemented all content strategies that would increase the interaction of their followers for the relevant platform. They worked with bloggers and influencers, promoted destinations, shared special offers and posted different content including lifestyle and special day content.

Business A officials stated that they especially focused on their followers' requests and comments shared on social media; thus, they continued their communications with their passengers through the social media channels, which created the opportunity of promoting their brands and ensuring that their passengers have a more enjoyable and smooth flight experience. The business also uses social media networks to announce various career opportunities, advantages, innovations and campaigns.

Based on these statements, we can conclude that Business A's marketing strategy before the COVID-19 pandemic focused on social media interactions, promotions, special offers and content marketing.

Business B

We interviewed the marketing leader of Business B on 27 May 2021. Before the pandemic, the business was diversifying its services based on the market and company needs owing to the increased competition. To better elaborate on the issue, they presented the example of an employee-specific product that was used by the airlines in the previous years.

This product was developed for the employee traffic in the market; eventually, it was also exposed to competition and diversified as white- and blue-collar. This practice continues to exist, with several modifications over the last years to baggage and change rights, specifically in blue-collar destinations. These products were segmented accordingly, and they were introduced to the market through SEO, website, social media, fairs and events, thereby reaching out to different passenger types through all channels. They used info-tours and events for the relevant regions and promoted the regions together with the products to create destination-specific traffic.

In addition to product diversification, the sales channels also expanded with the improvements in technology, and online agencies and airlines' own websites became important sources of sales. Thus, they developed direct commercial relations with globally available websites that offered route- and airline-specific price comparisons and recommendations to passengers. They made commission agreements based on the sales volume according to which, these websites advertised and recommended certain routes or product types depending on the needs of the airlines.

Along with online agencies and websites, the old-fashioned agency system was still important. Therefore, to maintain relationships and keep loyal customers, they offered certain advantages to local agencies, which had a smaller volume compared to the online agencies, such that they would be able to stay competitive; moreover, they supported these agencies with separate products and flexible rules.

Based on these statements, we can conclude that Business B used digital and online platforms as well as an efficient face-to-face marketing strategy before the COVID-19 pandemic. These strategies included being a low-cost sub-brand, product segmentation, B2B marketing in cooperation with websites that offer price comparisons and recommendations and digital and social media marketing.

Business C

We interviewed the marketing manager of Business C on 28 May 2021. Unlike other businesses in the industry, Business C does not sell tickets to the end user. Instead, it runs charter flights for domestic and foreign tour operators, institutions, sports clubs and so on. The key element is that they make seasonal and series flight agreements with tourism businesses. Therefore, there are

no marketing activities for retail customers/passengers. Their target audience is institutions. Their other customer base is domestic and foreign airlines. They lease their charters and flight teams to meet the seasonal capacity needs of other airlines. In this method, which is known as ACMI or wet lease in the industry, the charters are leased to other airlines for an hourly fee, while the team, maintenance and insurance expenses are covered by the lessor. The ACMI method is the option of supplying turnkey aircraft to their customers. This option is especially ideal for airlines and air operators who do not adopt the aircraft purchasing method or plan to meet temporary aircraft needs.

The company official of Business C explained that their pre-pandemic marketing strategies were based on two main elements as follows.

Active Marketing: They stated that the business had an active marketing approach before the pandemic. They had face-to-face meetings with their target institutions and airlines. They supported this with the numbers and stated that they had 282 face-to-face visits/meetings in 260 business days. Throughout the year, they participated in fairs and conferences both in and out of the country and made efforts to find new customers while ensuring the continuity of their relationships with the existing customer base.

Digital Marketing: They described a package that contained all internet-connected elements. They use Instagram and LinkedIn social networks. Furthermore, they used software for bulk e-mailing. The main purposes of this are to create a new customer base and increase brand recognition. Furthermore, they periodically send monthly bulk e-mails. As a part of their marketing efforts, these e-mails announce and remind their available aircraft and special service offers (e.g. for sports teams).

Based on these statements, it can be concluded that Business C used active and digital marketing practices within the scope of B2B marketing activities before the COVID-19 pandemic.

Business D

We interviewed the sales and marketing manager of Business D on 14 March 2022. Business D offers long-term leases on their aircraft to certain agencies, meaning they use a B2B marketing approach. Therefore, they do not have any marketing activities for customers or passengers.

Business E

We interviewed the commercial director of Business E on 15 March 2022. Before the pandemic, they increased the number of their aircraft in external bases and implemented strategies to become more effective in the market and develop products.

4.1.2. Marketing Strategies of Airlines During the Pandemic Period

Business A

Business A focused on digital communication during the pandemic and their approach centred around the sense of longing, importance of hygiene and yearning for travelling, exploring, and social interaction, as well as the hope surrounding these feelings. They were also very diligent in informing their passengers about the instant changes in national and cross-border rules and regulations on domestic or global travels. When the restrictions were eased occasionally, they chose to embrace an inclusive strategy by sharing posts that encouraged and inspired the passengers to travel again and sparked hope. Furthermore, Business A added 50 passenger aircraft to its cargo fleet of 25 aircraft during this period in 2020. Consequently, it became a company that achieved the biggest increase in market share in cargo transport.

Based on these statements, it can be concluded that Business A embraced an emotional marketing strategy during the pandemic.

Business B

During the pandemic, especially because the demand was declining and travel was only allowed when it was absolutely necessary, it was almost impossible to market existing products and measure the demand, let alone diversify the products. Because the pandemic created a single type of passenger, they built confidence in the market through the stability of their flights and embraced a price-oriented sales strategy to reach to this type of passenger. Specifically, the passengers chose to prefer brands that they know and trust in terms of detailed in-flight cleaning, air filters and precautions. The brand official stated that they are one of the pioneers of the sector in taking these measures. While the brand used to promote destinations and products before the pandemic, they now use all online mediums to inform their customers about hygiene, health and protection measures. Business B tracks all destination flights based on the Civil Aviation rules of regions, and they do not cancel flights unless the booking numbers are very low.

Cancellation rates play an important role in building passenger confidence along with the operational practices of the airlines. As passenger demand is limited to cases when travel is absolutely necessary, cancelling flights due to an insufficient number of passengers would directly impact other ticket purchases of the passengers during the pandemic. As the passengers travel out of necessity or due to an emergency, even a 1-hour change in flight times could impact the purpose of travel, or waiting at the airport could raise health concerns for the passenger. Cancellations during this period would lead the passengers to lose confidence in the airline; therefore, airlines that cancel the least number of flights even if they lose money will increase their brand reputation and occupancy rate in the future.

Apart from the competitive prices, operational stability to gain passenger confidence and informative advertising campaigns, another element that became important during this period is agency sales channels. At the onset of the pandemic, passengers who purchased their tickets through online agencies could not reach a live support person due to overwhelming demand and were directed to online messages or voicemails, which created inconveniences for the passengers. During the pandemic, passengers prefer local agency channels, which they can reach directly in case of any problems and voice their problems/demands. Therefore, airlines' relationships with the local agencies were important during the pandemic and airlines that listened to the agencies and took initiative to solve problems when necessary gained an advantage. In this context, marketing strategies focused more on local agencies than online agencies and websites during the pandemic.

Business C

During the pandemic, Business C could not use the active marketing element, which was their main activity area. They have limited instruments, which include social media, bulk e-mailing and phone follow-ups. They try specific efforts by monitoring information shared by countries about COVID-19. For example, when a country lifts its travel restrictions to Turkey, they can share social media posts or organise bulk e-mailing. They regularly share social media posts that will attract people and remind them of vacationing in Turkey. Although they do not have direct sales, they use this strategy for two main reasons, namely, to build online recognition and contribute to the current status of the country. Indeed, people in Europe, where the vaccination process is more successful, are planning vacations. In this context, the business underlined the importance of generating interest in Turkey both for their company and all stakeholders. Business C official stated that there is no expectation of significant activity in the near future; therefore, their main marketing strategies and efforts are to maintain their position as an important service provider and alternative for other institutions.

Business D

Business D developed its own sales system to diversify the sales scope during the pandemic. It implemented a market growth strategy through flight routes to new countries. Moreover, they founded their own digital services company to market their experiences in software form.

Business E

Business E, which delayed its flights until mid-June 2021, has focused on digital activities during this process. They renewed their website, assigned a team for customer relationship management, brought outsourced call centre service in-house and developed software and booking systems. They connected with digital sales platforms called metasearch. In this process, Business E implements all available strategies for market penetration, market development, product development and diversification.

In summary, Business A utilized social media interactions and content marketing, Business B employed digital and face-to-face marketing strategies, Business C engaged in active and digital marketing for B2B purposes, Business D focused on B2B marketing through long-term leases, and Business E focused on expanding their aircraft and market effectiveness.

Table 1. Marketing Strategies of Airline Businesses Before and After the Covid19 Pandemic

	Pre-pandemic marketing strategies	Marketing strategies during the pandemic period
Business A	Digital marketing Content marketing strategies	Emotional marketing strategy Inclusive strategy Digital marketing communication Cargo transportation
Business B	Low-cost sub-brand Product segmentation Diversification Digital marketing B2B marketing Destination marketing	Price oriented sales strategy Content marketing strategies Customer focused marketing strategy Digital marketing B2B marketing
Business C	B2B marketing Active marketing Digital marketing	Digital marketing Direct marketing
Business D	B2B marketing	Product development Market development
Business E	Market penetration Product development	Market penetration Product development Market development Diversification

5. RESULTS

This study demonstrates the pre- and post-COVID-19 pandemic marketing strategies of the airline companies that were interviewed in the study using an exploratory analysis. The interviews with the airlines revealed that the industry, in general, is under a great burden of debt. Many companies in the industry spread bank loan and debt payments over the next years in an effort to stay afloat; therefore, they will have to carry the burden of the crises for at least two more years. Considering that Turkey's Directorate General of Civil Aviation (*Sivil Havacılık Genel Müdürlüğü*) and the European Union Aviation Safety Agency have restrictive rules, using aircraft for cargo deliveries was not an option for many airlines. The restrictions on the amount of cargo that can be loaded on seats means very high per-person freight cost; therefore, this is not considered as an option by shippers unless there is an urgency. Another opinion is that there has been a change in passenger characteristics between the time period of the onset of the pandemic and a year later, especially after the vaccines. The main determinant here is that there has been an increase in passengers who have been vaccinated and/or had COVID-19.

Before the pandemic, Business A used marketing strategies that would increase their interactions with their followers on social media, and they shared different content including destination promotions and special offers. During the pandemic, Business A continued digital marketing communications and embraced a more inclusive strategy together with an emotional

marketing strategy. Their digital marketing communication preference corresponds with Çalışkan and Duygun's (2021) study, while its emotional marketing strategy is consistent with Çetinkaya's (2020) study. Furthermore, Business A became the company with the highest increase in cargo transportation market share by adding their passenger flights to their cargo fleet. This strategy is consistent with the SWOT analysis conducted by Karakavuz (2020) during the COVID-19 period, as well as the literature (Cam, 2019; Hopancı et al., 2021).

Business B was established as a low-cost sub-brand during the pandemic through the use of establishing a subsidiary airline strategy. Before the pandemic period, it used product diversification, product segmentation, digital marketing, destination marketing strategies and B2B marketing strategy, especially with local agencies. During the pandemic, it used B2B marketing strategies with local agencies, price-oriented sales strategy, digital media content strategy and customer-oriented marketing strategy, prioritising building customer confidence. Customer-oriented marketing strategy is consistent with Çetinkaya's (2020) study while digital media content strategies are consistent with Semercioğlu and Abay's (2021) study.

Business C, which operates in the B2B market, performed active and digital marketing activities before the pandemic, focusing on customer relations management. They could not use active marketing during the pandemic; therefore, they turned to direct and social media marketing strategies. Business D, which performed B2B marketing activities, did not use any marketing strategies before the pandemic; however, they implemented product and market growth strategies during the pandemic. Business E used product and market growth strategies before the pandemic; they turned to effective market penetration, market growth, product development and diversification strategies during the pandemic.

Based on these results, it has been observed that Business A used digital marketing strategy in both periods; however, while they used content marketing strategy before the pandemic, they switched to emotional marketing strategy during the pandemic. Unlike other businesses, Business A tried to cover its losses during this period by converting some of its passenger planes into cargo planes.

Like Business A, Business B also continues its digital marketing and B2B marketing strategies that were used before the pandemic. They increased their cooperation with local agencies, which are their B2B marketing customers. Business B used product segmentation and diversification strategies before the pandemic; however, unlike other businesses, it turned to content marketing strategy, price-oriented sales strategy and customer-oriented marketing strategy during the pandemic.

Business C used B2B marketing, digital marketing and active marketing strategies before the pandemic; however, during the pandemic, it turned to social media marketing as a form of digital marketing, and unlike other businesses, it also used direct marketing strategies.

A review of the literature reveals that the majority of the studies and analyses focus on the airlines' communications with the consumers, patterns of social media use, management styles, and operational practices during the pandemic; studies on the marketing strategies and practices during the COVID-19 period are limited. Few studies on this topic are referenced in the literature section. We believe that this study will provide an important contribution to the aviation marketing literature as it investigates the effect of COVID-19 on airlines' marketing strategies.

The limitations of this study would be the fact that only three of the airline companies operating in Turkey participated in the study. Future studies may include comparisons with other airlines. Furthermore, new marketing strategies implemented by airlines after the easement of travel restrictions following the booster dose may also be investigated.

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EXTENDED ABSTRACT
GENİŞLETİLMİŞ ÖZET**COVID-19 PANDEMİSİNİN TÜRK HAVA YOLU İŞLETMELERİNİN PAZARLAMA STRATEJİLERİNE
ETKİSİ**

Bu makale, havayolu şirketlerinin pazarlama stratejileri üzerine odaklanmaktadır. Türkiye'nin önde gelen havayolu şirketlerinden Türk Hava Yolları (THY) örneği üzerinden incelenen bu çalışmada, havayolu şirketlerinin müşteri segmentasyonundan, fiyatlandırma stratejilerine, hizmet kalitesi ve müşteri deneyimine kadar çeşitli pazarlama alanları ele alınmıştır. Pazarın rekabetçi doğası nedeniyle havayolu şirketlerinin farklılaşarak, farklı hedef kitlelere hitap ederek ve müşteri memnuniyetini artırarak rekabet avantajı elde etmeye çalıştığı belirtilmiştir. Hizmet kalitesi, reklam ve pazarlama iletişimi, sadakat programları gibi stratejilerin müşteri memnuniyetini artırabileceği ve müşteri bağlılığını sağlayabileceği vurgulanmıştır. Ayrıca, havacılık sektöründeki teknolojik yeniliklerin ve işbirliklerinin de pazarlama stratejilerine katkı sağlayabileceği ifade edilmiştir. Makale, havayolu şirketlerinin başarılı bir pazarlama stratejisi ile müşteri tabanını genişleterek, sektörde rekabet edebileceği sonucuna varmaktadır.

Havacılık endüstrisi, savaş, terörizm tehdidi, salgın hastalıklar, küresel ekonomik krizler ve yüksek yakıt fiyatları gibi birçok kontrol edilemeyen faktörün neden olduğu risklere açıktır (Kıracı, 2021:1562). Havayolu taşımacılığı endüstrisi, pandeminin duyurulmasından bu yana eşi benzeri görülmemiş bir mali zorlukla mücadele etmektedir (Şen ve Erdağ, 2021: 443). Ancak, havacılık endüstrisi aynı zamanda tıbbi ve uluslararası yardımın dağıtımında önemli bir rol oynamıştır (Akca, 2020: 60).

1978 yılında Amerikan Havayolu Düzenlemesi Yasası'nın yürürlüğe girmesinden bu yana, küresel hava taşımacılığı endüstrisi önemli bir büyüme ve dönüşüm yaşamıştır. Sürekli artan talep ve değişen ekosistemler, düşük maliyetli havayolları gibi yeni iş modelinin ortaya çıkmasına yol açmıştır (Ko, 2016: 54).

Düzenleme sonrası dönemde, işletmelerin karlılığı pazar koşullarına göre belirlenmeye başlanmış ve havayolları önemli ölçüde pazarlama stratejilerini değiştirmiştir. İşletmeler, genel olarak pazar paylarını genişletmek ve maliyetlerini azaltmak için agresif politikalara odaklanmışlardır. Teknoloji çağında ve özellikle düzenlemelerin ardından havayolları hem rezervasyon hem de kod paylaşımı için bilgisayar teknolojilerini kullanmaya başlamışlardır (Şen ve Erdağ, 2021:453). Biletlerin yaklaşık %70'i bilgisayar rezervasyon sistemi aracılığıyla satılmaktadır; düzenlemelerden önce bilet satışlarının bilgisayar rezervasyon sistemi üzerinden oranı %40'ın altındaydı; ancak bugün bu oran %70'e ulaşmıştır (Yılmaz, 2020: 157).

Ülkemizde geniş bir uçuş ağına sahip olan THY, farklı sınıflandırılmış müşteri gruplarına farklı ön ve son uçuş hizmetleri sunan geleneksel ulusal ve büyük bir havayolu statüsüne sahip bir örnek olarak kabul edilebilir. Aynı zamanda, THY, tam hizmet taşıyıcıların da ötesine geçerek düşük maliyetli bir yan kuruluş olan AnadoluJet ile de farklı müşteri segmentlerine hizmet sunmaktadır. Bu, havayolu şirketlerinin pazarlama stratejilerini farklılaştırarak, farklı hedef kitlelere hitap etme ve rekabet avantajı elde etme amacını yansıtmaktadır.

Havayolu şirketleri için pazarlama stratejileri şunları içerebilir:

1. Segmentasyon ve Hedef Kitle Belirleme: Havayolu şirketleri, potansiyel müşterilerini farklı segmentlere ayırarak ve farklı ihtiyaçlara sahip gruplara odaklanarak daha etkili bir pazarlama yapabilirler. Örneğin, iş seyahatleri için sık seyahat eden iş adamları, turistik seyahatler için tercih eden tatilciler veya bütçe bilincine sahip olan düşük maliyetli seyahatçiler gibi farklı hedef kitleler belirlenebilir.
2. Fiyatlandırma Stratejileri: Havayolu şirketleri, fiyatlandırma stratejileri ile müşteri çekmeyi ve doluluk oranlarını artırmayı hedefleyebilirler. Promosyonlar, erken rezervasyon indirimleri, sezonsal kampanyalar gibi çeşitli fiyatlandırma politikaları uygulanabilir.
3. Hizmet Kalitesi ve Müşteri Deneyimi: Havayolu şirketleri, müşteri memnuniyetini artırmak için hizmet kalitesini ve müşteri deneyimini ön planda tutmalıdır. Rahat koltuklar, lezzetli yemekler, eğlence seçenekleri gibi hizmetler müşterilerin sadakatini artırabilir.
4. Reklam ve Pazarlama İletişimi: Havayolu şirketleri, potansiyel müşterilere ulaşmak için etkili reklam ve pazarlama iletişimi stratejileri uygulamalıdır. Televizyon, dijital medya, sosyal medya gibi farklı kanallar kullanılarak geniş kitlelere ulaşılabilir.
5. Sadakat Programları: Havayolu şirketleri, müşteri sadakatini artırmak için sadakat programları ve mil biriktirme avantajları sunabilirler. Bu tür programlar, müşterilerin tekrar tekrar aynı havayolu şirketini tercih etmelerini sağlayabilir.
6. Yerel ve Uluslararası İşbirlikleri: Havayolu şirketleri, diğer havayollarıyla ve seyahat acenteleriyle işbirlikleri yaparak müşteri tabanını genişletebilir ve farklı pazarlara ulaşabilir.
7. Yenilikçilik ve Teknoloji: Havayolu şirketleri, yenilikçi hizmetler ve teknolojiler geliştirerek müşteri deneyimini iyileştirebilirler. Örneğin, kolay mobil rezervasyon uygulamaları veya uçuş sırasında internet erişimi gibi özellikler müşteriler için değerli olabilir.

En önemli bir nokta, havayolu şirketlerinin pazarlama stratejilerinin sürekli olarak değişen pazar koşullarına uygun olarak güncellenmesi ve iyileştirilmesidir. Rekabetin yoğun olduğu havacılık sektöründe, başarılı bir pazarlama stratejisi şirketler için önemli bir rekabet avantajı sağlayabilir.

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