

An empirical investigation into the changing visual identity of full service and low cost carriers, 2000 vs. 2012

Adam Taylor, David Pitfield, Lucy Budd

Transport Studies Group, Loughborough University (United Kingdom)

D.E.Pitfield@lboro.ac.uk, L.C.S.Budd@lboro.ac.uk

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Abstract

Purpose This paper reports on the findings of an analysis of the visual branding of over 630 airline tail fins as they appeared in 2000 and 2012.

Design/methodology Unlike existing studies of airlines' visual identities that rely on a snap shot in time and examine all airlines, this paper focuses on changes that have occurred in the visual branding of full-service carriers (FSCs) and low cost carriers (LCCs) between 2000 and 2012 using a semiotic content analysis.

Findings The results confirm that there have been significant changes in the visual content of FSC and LCC tail fins and the way in which these airlines portray non-price competitive characteristics. The research shows that while an increasing number of LCCs now use aircraft tail fins to display their corporate name, FSCs are increasingly employing icons of nationhood. This suggests that while LCCs are trying to appeal to a wide passenger demographic who value low fares over service, FSCs are responding to the competitive threat by explicitly drawing on the cultural rhetoric of symbols of sovereign national identity to differentiate themselves in an increasingly competitive market.

Originality/value This paper builds on previous analyses of this type focusing on temporal comparisons and suggesting differing strategies adopted by LCCs and FSCs.

Keywords airlines, visual identity, branding

1. Introduction

Airline liveries have long been a subject of interest and debate among graphic designers, passengers, and academics. The often colourful paint schemes, decals, and logos that are applied to the fuselage, tail fin and wing tips of aircraft are not only designed to project, through strategically significant combinations of colours, typefaces, and visual motifs, the core brand values of the airline and visually differentiate its aircraft from those of its competitors, but also to protect the airframe from corrosion and reduce the friction that is generated when an aircraft is flying (thereby lowering fuel burn, fuel costs, and emissions).

In an era of intense competition, decreasing margins, and global economic downturn, a strong brand and positive corporate identity are vital components of airlines' corporate strategy. Commercial airlines collectively spend millions of US Dollars every year on refining and refreshing their visual identities and ensuring that they select appropriate combinations of colours, fonts, and visual motifs that project and reinforce the airline's core brand values.

The deregulation of the US airline industry in 1978 and the progressive liberalisation of other world aviation markets from the mid-1990s onwards have enabled new airlines to enter the marketplace and engage in competition and compete on price with the incumbent full-service (and often flag-carrying) operators. However, price competition alone is insufficient to create and retain new business and, more than ever before, airlines are using their brands as major competitive weapons. Through a semiotic analysis of the visual content of over 630 airline tail fins, this paper identifies the key similarities and differences in the visual identities of low cost and full service operators in 2000 and 2012. The paper begins with a review of the literatures relating to branding and airline visual identity before the data collection methods are described, the findings presented, and the implications of the results for practices of airline brand management considered.

2. Brand identities

Shaw (2007, p.227) defines a brand as "any situation where customers perceive significant differences in the products of competing suppliers". In a capitalist consumer society, brands are powerful tools that influence public perceptions, investment and, most importantly in the context of this paper, consumer buying behaviour (Balmer, 2003). Brands aim to create a unique identity and position for a company's products and/or services in order to distinguish them from those of its competitors and encourage customers to purchase them in preference to rival offerings.

While branding is important to all economic sectors, it is particularly vital for service industries who need to create distinctive brand values and consumer appeal in what is often a crowded

marketplace (Berry, 2000). In the case of tangible consumer goods, it is possible for the customer to quality check the product before purchase by, for example test driving a vehicle, trying on a pair of shoes or visually assessing the ripeness of fruit. However service companies, including restaurants and transportation companies, cannot package or display their goods or services in the same way prior to purchase. These companies, therefore, have to generate a desire among potential customers to consume their particular gastronomic or travel experience over that of their competitors by helping them to visualise and appreciate the value of the intangible factors associated with the service offered (Chen & Chang, 2008). Yoo and Donthu (2001) similarly suggest that a strong brand is vital to the success of service companies as it can significantly influence a company's profits, cash flow and consumer purchasing behaviour.

Airlines are one example of companies who rely on brands to sell their services. As Budd (2012) explains, airlines sell not only the safe (and hopefully reliable) transportation of passengers and goods from A to B, they also provide travel experiences, international communications and logistics. The 'experience' that an airline offers to its customers thus encompasses not only tangible attributes, such as seat comfort, seat pitch, in-flight entertainment, and on-board catering, but also a number of intangible aspects including (but not limited to) the perceived social status of the brand, the friendliness of airline staff and the general ambience and corporate social responsibilities and values of the company.

While the tangible attributes of a brand can often be quickly matched by competitors, Shaw (2007, p.228) suggests that strong brands are dependent on the 'psychological brand values, which cannot be quickly matched by rivals'. Some of these brand values include personal aspirations, pride and the perceived social status of the individual concerned and may influence a traveller to fly with one carrier in preference to another. On the other hand, if travellers prioritise value and convenience, they may choose to fly with a low cost operator. These psychological brand values are best expressed through the 'brand image', which Keller (1993, p.3) defines as 'the perceptions about a brand as reflected by the brand associations in a consumer's memory'.

As Brodie, Whittome and Brush (2009, p.347) have shown, brand association expresses the emotional perceptions a consumer attaches to a particular brand, as well as the 'symbolic meanings attached to specific attributes of the product or service'. Brand association is, therefore, vital to the profitability of any company and marketing executives routinely employ it to position, extend and differentiate brands. If done well, this process creates positive attitudes and feelings toward the brand among employees, consumers and shareholders (Aaker 1991). However, building a strong brand requires time, effort, and planning. The

rewards associated with building a strong brand, however, can be invaluable. Customers may choose a product or service based on the brand name alone and prior experience or cultural perception of a brand influences future purchasing behaviour (Berry, 2000). Such 'brand equity', or 'the incremental utility or value added to a product from its brand name' (Chen & Chang, 2008, p.40) is particularly important for airlines. For example, a customer may wish to fly with Airline A, purely because they are familiar, loyal and comfortable with the brand and feel at ease when paying for the intangible service that cannot be quality checked prior to purchase. Positive brand equity such as this can bring a wealth of business to the company in the form of new and repeat custom, as well as increased brand awareness. However, brand equity can also be negative, particularly if a brand becomes associated with poor customer service, industrial unrest, or a fatal accident.

The majority of airlines, like other service companies, strive to create a strong brand by utilising psychological and emotional values to create positive brand equity. But this is no easy task. Berry (2000 p.129) believes that 'Brand meaning' (defined as 'the customer's dominant perceptions of the brand. It is the customer's snapshot impression of the brand and its associations') and 'Brand Awareness' can both positively and negatively contribute to Brand Equity. Berry (2000) furthermore suggests that communications influence brand meaning for customers who have little or no prior experience of the company. These communications, whether through television, social media, word-of-mouth, livery, logos or advertisements, help shape a customer's impression of the brand.

Brand awareness is largely influenced by the visual cues (such as a logo) that a company displays to the public. A logo can take the form of an emblem, a graphic mark, a company name or any other shape, picture, colour or font that is uniquely associated with a company and which, in turn, impacts on brand knowledge, meaning, awareness and equity (Keller, 2003). The brand logo is notably the most common instrument used to gain attention, recognition and differentiation and is arguably the most important element of a company's brand (Buttle & Westoby, 2006).

3. Airline Brands

One of the most familiar expressions of an airline's brand is the livery that is painted on its aircraft. Thurlow and Aiello's (2007) analysis of 561 airline tail fins discovered that all featured at least one of five categories of icon - flight (e.g. birds, wings, and aircraft), space and distance (globes, stars, clouds, planets), direction (e.g. arrows, darts), speed (e.g. diagonal lines and stripes to indicate movement through the air), and motion (such as spirals, waves, and ripple effects). A sixth category of icons of nationhood was added by Budd (2012). These icons of nationhood include flags (for example, British Airways), native flora (Aer Lingus'

Shamrock and MEA's Cedar of Lebanon), indigenous fauna (Qantas' kangaroo and Tuniair's Gazelle), local cultures (Alaska Airlines' face), and national culture. Egyptair, for example, employ an image of the ancient Egyptian sun God, Horus.

In many cases, Thurlow and Aiello note that more than one category of icon is employed. A notable example of a polysemous airline livery is Lufthansa's stylised flying crane set against a sun on blue background representing distance and space. Budd (2012, p.1) suggests that an airline's livery and tail fin design not only aim to portray the airline's values but is increasingly used as a competitive weapon to 'visually differentiate carriers from their competitors and seek to influence in consumer perceptions of airline brands by promoting the notion that a particular carrier is safe, reliable, sophisticated, innovative, or fun'.

4. Method

In order to compare the differences in airline tail fin designs between Full Service Carriers and Low Cost Carriers over time, a semiotic content analysis (similar to that performed by Thurlow & Aiello in 2007) was conducted using the full-colour photographs published in two airline enthusiasts' books - Hengi's *Airline Tail Colours* (published in 2000) and Manning's *Airline Tail Colours* (published in 2012). Each book contains approximately 580 images of airline tail fins.

Information on the principal type of operation (full-service, charter, low cost or cargo) of the 1098 airlines depicted in both books was obtained from the written descriptions that accompanied each image. Where this information was ambiguous or absent, internet searches were undertaken to establish the airline's principal operating model.

In this way, 257 FSCs and 75 LCCs (332 in total) were identified from Hengi's (2000) *Airline Tail Colours* and 212 FSCs and 92 LCCs (304 in total) were identified from Manning's (2012) *Airline Tail Colours* (see Table 1 overleaf). Interestingly, the proportion of FSCs fell from 46.8% of all airlines in 2000 to 38.8% in 2012 while LCCs increased from 13.7% to 16.8%, indicating the relative growth in the LCC sector following liberalisation and the contraction and consolidation (through mergers and acquisitions) of the FSC sector. The proportion of other airlines, including charter, regional airlines, and cargo operators (which were not considered as part of this research), remained relatively consistent.

A semiotic content analysis of the content of each FSC and LCC tail fin that was identified was performed for the year 2000 and the year 2012. Up to 60 individual pieces of information were recorded for each airline including the number of shades and different colours used on the tail fin as well as the nature of the visual motifs that were displayed. This resulted in a 41,000-cell dataset that contained information on 636 airline liveries. Owing to the dynamic nature of the airline industry, not all the airlines that were flying in 2000 were still operating in 2012 and a

number of new airlines had entered the marketplace after 2000. Although this renders direct visual comparisons between all individual airline's liveries in 2000 and 2012 impossible (only a small number of FSCs and very few LCCs were operating in both 2000 and 2012) the research nevertheless offers a valuable insight into the dominant liveries and the similarities and differences in the visual identities that FSCs and LCCs used in the two years in question.

Carrier Type	Source			
	Hengi (2000)		Manning (2012)	
	Total	Percentage	Total	Percentage
Full Service Carrier	257	46.8%	212	38.8%
Low cost carrier	75	13.7%	92	16.8%
Charter	77	14.0%	80	14.6%
Cargo	55	10.0%	59	10.8%
Government/Private	10	1.8%	16	2.9%
Regional/Commuter	57	10.4%	65	11.9%
Franchise	10	1.8%	13	2.4%
Subs	8	1.5%	10	1.8%
Total	549	100%	547	100%

Table 1. Number and proportion of airline types by year/source.

5. Results

The findings of empirical content analysis yielded a number of interesting insights into the similarities and differences in the visual composition of FSC and LCC identities and the extent to which they changed between 2000 and 2012. Table 2 summarises the key findings.

For both FSCs and LCCs, white, blue, and red were by far the most popular colour combination in 2000 and 2012. White was the most popular base (or background) fuselage colour for FSCs in both 2000 and 2012 and it was also the most popular colour for LCCs in 2000. However, blue replaced white as the most popular background colour for LCCs in 2012. In general, orange, yellow, purple and pink proved to be popular colours for LCCs, with the use of orange, in particular, growing markedly in popularity between 2000 and 2012. These 'fresh' colours, contrasted with the more conventional colours and shades adopted by FSCs. Interestingly, a number of colours, including brown, black, and green were used by very few airlines of either business model. On average, the tailfins of FSCs utilised more colours and shades than those of LCCs and, over the 12 year period, the average numbers of colours used by LCCs has declined.

In terms of icons and visual motifs, FSC liveries featured between two and four individual icons while those of LCCs were simpler and generally featured only one or two designs. A trend

towards simplification in LCC liveries was noted between 2000 and 2012. The classification system proposed by Thurlow and Aiello (2007) is used to structure the following sections.

Attribute	Low Cost Carriers	Full Service Carriers
Use of unconventional colours	More common	Less common
Average number of colours used	Fewer colours used (Average of 2.5 in 2012)	More colours used (Average of 3 in 2012)
Average number of icons	- Lower than FSCs - Number decreased 2000-2012 - Average 1.6 in 2012	More than LCCs - Number remained stable 2000-2012 - Average 2.3 in 2012
Name used as an icon	- More important - Use increased 2000-2012	- Less important - Use decreased 2000-2012
Icons of Nationhood	- Less important - Use decreased 2000-2012	- More important - Use increased 2000-2012
Icons of Flight	- Less important - Use decreased 2000-2012	- More important - 4 times more common in 2012 than 2000
Icons of Directionality and Motion	Use decreased 2000-2012	Use increased 2000-2012

Table 2. Key differences in visual composition of LCC and FSC tail fins.

Tail fins that featured the airline’s name were the most popular icon used by LCCs for both periods studied. The number of FSCs featuring their name on the tail fin dropped by 5% from 2000 to 2012 (Figure 1).

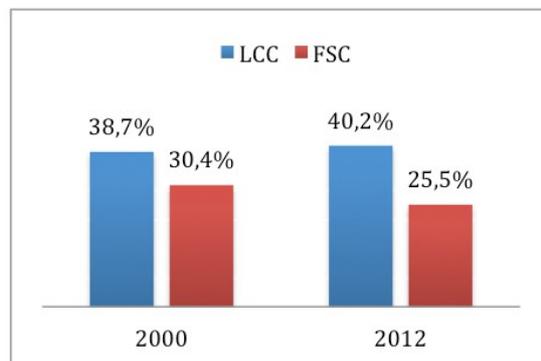


Figure 1. Changing frequency of name, 2000 vs. 2012

Unsurprisingly, icons of nationhood were the most popular design for FSCs in both years. In 2000, a third of LCCs and 55.6% of FSCs featured an icon of nationhood but by 2012 only 30.4% of LCCs did (Figure 2).

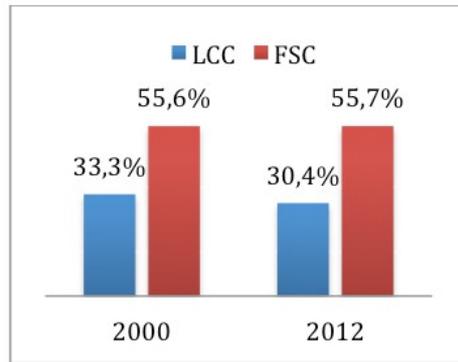


Figure 2. Changing frequency of icons of nationhood, 2000 vs. 2012

Icons of speed were popular with both FSCs and LCCs in both 2000 and 2012. Speed icons were the second most popular motif category for FSCs in both years studied and the third and second most popular for LCCs in 2000 and 2012 respectively. Both LCCs and FSCs increased the frequency that icons of speed were used, but 10% more FSCs utilise this element than LCCs (Figure 3).

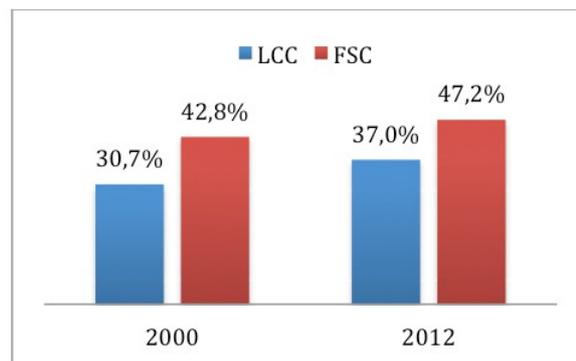


Figure 3. Changing frequency of icons of speed, 2000 vs. 2012

Icons of flight were a popular choice for FSCs with 42% having a bird, aircraft or wings somewhere on the tail fin in 2000 making it the third most popular icon. This was compared to 18.7% of LCCs in 2000 placing it as the fifth most popular icon (Figure 4). The frequency that icons of flight were used declined over the 12-year time period with LCCs dropping at a faster rate. Despite this, icons of flight remained as the fifth most popular element in 2012 for LCCs, and the third most popular for FSCs.

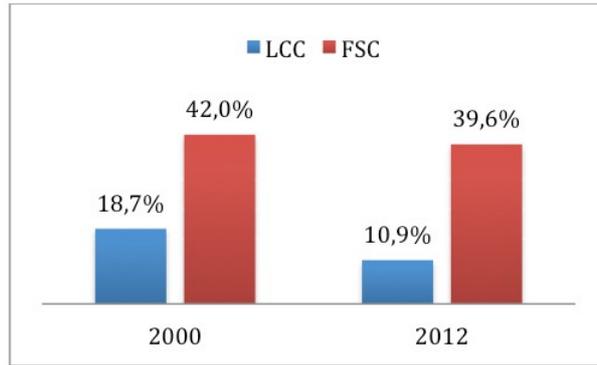


Figure 4. Changing frequency of flight icons, 2000 vs. 2012

Icons of distance and space was the fourth most popular icon for both carriers across both years studied, with FSCs around 10% more likely to use a globe, sun, star, planet or cloud somewhere on the tail fin. From the period 2000 to 2012, both carrier types increased the frequency with which this motif was used (Figure 5).

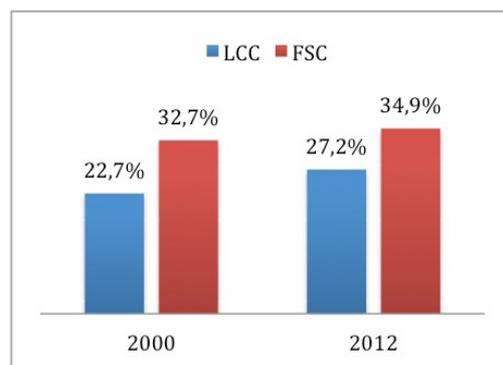


Figure 5. Changing frequency of distance and space icons, 2000 vs. 2012

Icons of directionality had similar frequencies for both FSCs and LCCs in 2000 at around 15%. Over time, however, FSCs increased the use of arrows and wake lines causing over 20% to show some evidence of directionality (Figure 6). In contrast, LCCs decreased the frequency of arrows and wake lines to 11%.

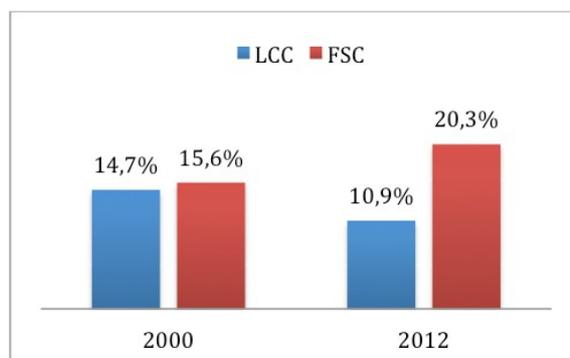


Figure 6. Changing frequency of directionality icons, 2000 vs. 2012

Icons of Motion remained the least popular motif for both carriers across both years. Across the two periods, however, FSCs increased the frequency of spirals or ripples by 3%, compared to a decrease in frequency of 6% by LCCs (Figure 7).

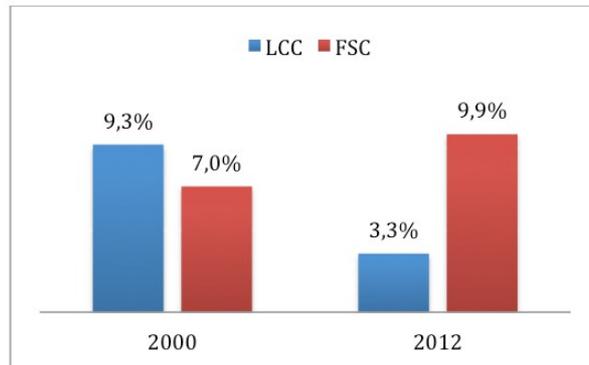
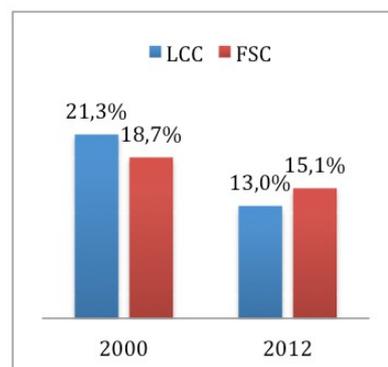
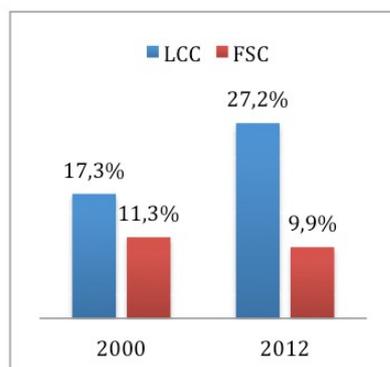


Figure 7. Changing frequency of icons of motion, 2000 vs. 2012

Having the airline’s name appearing in full or as an acronym on the tail was the most popular individual motif for LCCs in 2000 (over 21% of operators utilised their name this way). In contrast, it was only the 4th most popular motif for FSCs in 2000. At the time, the use of acronyms was more popular than using the airline’s full name, but this has changed considerably for LCCs with full names becoming over twice as popular as acronyms in 2012. Consequently, the use of the full name by LCCs went from third most popular visual motif in 2000 to the most popular in 2012. FSCs, however, have decreased the frequency that acronyms and the full name are used (Figures 8 and 9). For both types of carrier, the use of acronyms has dropped considerably over time, and in 2012 it became the fourth most popular visual motif for LCCs, favouring full names instead. The use of acronyms for FSCs dropped two places to become the sixth most popular. Despite this, however, FSCs now utilise acronyms more than LCCs in 2012.



Figures 8 and 9. Changing frequency of tail fins with name in full (left) and with name as an acronym (right)

Birds were one of the most popular visual motifs for FSCs across both years studied, although the number of bird motifs as a proportion of the total fell for both types of airline (from 28.8%

to 24.5% for FSCs and from 12% to 8.7% for LCCs). Images of wings and aircraft on tail fins proved to be an unpopular visual motif amongst all the airlines studied.

National colours were a popular visual motif with FSCs, placed fifth most popular in 2000 and third most popular in 2012 with nearly a fifth of all FSCs showing evidence of national colours. LCCs did not utilise national colours nearly as frequently. Cultural artefacts were actually a more popular choice for LCCs in 2000 with it being the eighth most popular visual motif and the most popular icon of nationhood but have since halved in use. National colours are now the most popular icon of nationhood for LCCs. Fauna was also a relatively popular choice for both carriers (second most popular icon of nationhood), appearing in the top 10 for LCCs and FSCs in 2012. Flags were relatively popular in 2000, appearing tenth for LCCs and ninth for FSCs, but have since decreased in frequency due to fauna increasing in popularity. Flora, mythical creatures and people were not a popular choice amongst either FSCs or LCCs in either year. For LCCs, suns were the most popular icon of distance and space over both time periods; with the carrier type increasing its frequency from 2000 to 2012. As such, the visual motif rose from the sixth most popular item to the fifth in 2012. This was in contrast with FSCs whose most popular icon of distance and space was the globe, used in nearly a fifth of Full Service airlines studied in both years. Despite the popularity, FSCs reduced the use of globes over time and saw it fall from third most popular visual motif to fourth. This may be partly due to the increased use of suns, which entered the top ten visual motifs in 2012 at ninth place. In contrast to FSCs, LCCs increased the use of globes from 2000 to 2012 proving them to be the seventh most popular item. The use of stars, planets and clouds proved relatively unpopular throughout the study. However, it should be noted that clouds were not recorded at all in 2000 but have since seen over a handful of carriers utilise this type of visual motif in 2012. Spirals and ripples were not a popular choice for either type of carrier. Spirals were the ninth most popular visual motif in 2000 for LCCs, however they have since dropped in frequency in favour for icons of speed. Over the two time periods studied, spirals have more than doubled in frequency for FSCs, although numbers still remain relatively low. Ripples have proved to be an unpopular choice for all airlines across both years.

Across both years, arrows were a more popular visual motif with FSCs. In 2012, they were the fifth most popular visual motif, rising from sixth place. Still popular with LCCs, but contrasting to FSCs, arrows decreased in frequency in 2012 falling to the eighth most popular from fifth place. Wake lines were generally unpopular throughout the study for all airlines.

6. Discussion

The evidence collected shows that over the past 12 years competitive pressures on FSCs and Low Cost Carriers LCCs have caused some significant changes in the visual branding of the two

types of carrier. The decade prior to 2012 has been one of the most turbulent in aviation history. Airlines have had to re-align their business models to ensure survival; some have had to take more drastic measures such as file for bankruptcy, whilst others have had to cease operations altogether. The changing nature of FSCs and LCCs as two industries in their own right has, therefore, seen some notable changes in the way that each carrier type visually brands itself.

The evidence collected on the increased use of bright and unconventional colours amongst LCCs supports Budd's theory (2012, p.5) that "the choice of unconventional colours possibly reflects LCCs' aim of creating unique and distinctive visual identities in a crowded market that convey and reinforce the notion that these airlines are new and innovative". Many colours hold values subconscious to the human mind that airlines utilise to their advantage. Over the years, evidence suggests that they are decreasing the use of some colours possibly because of the subconscious emotional values they hold. The increased use of red for example, particularly amongst LCCs, may have emerged due to the brand values that can be associated with the colour. For example, happiness, power, dominance and love are commonly associated with red and could be used as a subconscious non-competitive visual motif that would differentiate some airlines from others. In reverse to this, the decreased use of blue (again, particularly for LCCs) may also be attributed to the brand values associated with blue. For example, the notion of feeling blue is associated with sadness. In German, to 'feel' blue is to 'feel' drunk. Blue, in general, is also associated with the feeling of coldness. Interestingly, the use of yellow for LCCs has decreased dramatically by half, maybe due to the colour being associated with caution and cowardice.

Disregarding any emotional values associated with colours, however, the progressive decrease in use of yellow and blue amongst LCCs may be due to the decreased use in icons of nationhood, particularly flags and national colours. Governments globally are increasingly granting cabotage, which gives airlines the freedom to operate commercial services between two points within foreign states. LCCs are using cabotage as a competitive advantage to further increase global market share. Consequently, new and existing LCCs are increasingly disassociating their brands to the country they originate from. EasyJet, Air Asia, Germanwings and Air Baltic are all notable examples of where icons of nationhood are not used. In fact, amongst the Low Cost sector the airline's name has proved to be an increasingly important brand value in its own right.

LCCs have utilised their name on their tail fins more than ever before due to the increased brand equity they can bring. The research agrees with Chen and Chang (2008) and Berry (2000) that the name of the company can serve as a powerful competitive weapon. Having the

airline's name displayed on a LCC was the most popular icon amongst all those studied in 2000 and 2012, agreeing with Budd's (2012) research. In sum, LCCs increasingly take advantage of the name of their airline by displaying it on their tail fin due to the positive brand equity that it can bring. This is not true for FSCs, however, as they prefer to use icons of nationhood as a way of increasing their competitive advantage. This can be seen in British Airways' recent branding campaign that plays on the airline's heritage and its Britishness by displaying the Chatham dockyard flag on the tail fin, or Hawaiian Airline's stylised Pualani symbolising hospitality, tranquillity and exoticness.

As FSCs tend to be older than their Low Cost incumbents, evidence shows that their visual branding increasingly uses history, experience and nationhood arguably as a way of differentiating themselves from their Low Cost rivals. Therefore, icons of nationhood are not decreasing for both carriers, as expected. In 1997, British Airways famously re-branded their tail fins with images from different countries around the globe: Egyptian wall hangings, Native American wood carvings and Japanese calligraphy were all notable examples. The re-branding was controversial with many complaining about the new designs. Thurlow and Aiello (2007) suggest that many people, regardless of nationality, liked flying British Airways because it was British. Many other airlines also learned a lesson here and discovered that people liked flying with them because of the respective nationality they had.

Interestingly, the simplistic nature of Low cost carriers' business models, as described by O'Connell and Williams (2005), could arguably be reflected in the design of their tail fins. The amount of colours used, for example, is considerably less on average in LCCs compared to FSCs, and has continued to decrease (or simplify) over the years as the Low Cost business models also become simpler. The average amount of icons used is also considerably less than that of Full Service rivals, decreasing over the years. The 'hassle free', simple fare system that low cost operators have adopted and adapted over the years have, therefore, arguably been reflected in simplification of tail fin design. This may be attributed to the decrease in icons of directionality, motion, flight and nationhood. Despite these icons decreasing in frequency, (but still remaining a popular choice of many carriers) the research suggests that icons of speed is an increasingly important fundamental visual brand characteristic found in many LCCs and, as of 2012, the second most popular icon after the name. Many LCCs did, in fact, often show the name of the airline along with an icon of speed (such as a stripe or wave). It can, therefore, be suggested that in many cases, icons of speed (which can represent convenience, promptness and simplicity) replace directionality, motion and, in some cases, flight and nationhood. Again, this represents the simplistic nature of Low cost carriers' business model in getting customers from A-B in the simplest, cheapest and most convenient way possible. Full Service Carriers, on the other hand, show increases in the use of directionality and motion whilst keeping icons of

flight at a frequency four times as popular as LCCs in 2012. This further suggests that FSCs are continuing to hold on to their heritage, expertise of flight and direction as a competitive brand value.

There were many areas where both industries showed similarities in visual branding which may represent the changing behavioural patterns of the air traveller in general. The research suggests that for both types of carrier, icons of speed in visual airline branding are of growing popularity and importance. Literature confirms that airlines are increasingly adopting innovative advertising strategies and business approaches in an effort to make the overall travel time reduce as much as possible. This may include flying to convenient, central airports, to the ability to check in online and priority boarding. Consequently, icons of speed have increased amongst both types of carrier and icons of flight (although still a popular choice, particularly for FSCs) have reduced. This is attributed to the increased use of waves for both LCCs and FSCs, possibly due to the attractiveness of the softer shape of a wave compared to the harshness of a straight line for stripes. Birds, however, have decreased amongst all types of carriers, but still remain popular. It confirms, and adds to, the literature that suggests core advertising strategies for speed, convenience and comfort are now being reflected in the visual branding of airlines, and not so much the art of flying. It suggests that as the industry has evolved, the needs and wants of the general air traveller have changed, perhaps from an exciting, unique and pleasurable flight experience, to a speedy, comfortable, point-to-point transport service.

This study challenges Thurlow and Aiello's (2007) research that suggests each airline has at least one of five visual icons of their tail fin: Icons of Distance and Space, Directionality, Speed, Motion and Flight. For the two time periods studied, there were 49 airlines in 2000 and 48 in 2012 that showed no signs of the icons described by Thurlow and Aiello (2007). Once icons of Nationhood were added, as suggested by Budd (2012), there were still a number of airlines that did not fall into any category. As explained previously in the methodology, and due to the increasing importance placed on brand equity within the services' industry, as well as the simplistic nature that many airline business models adopt in recent times, it was thought the 'Name' be added as a final category. Indeed, once 'Name' was added to the previous 6 icons, each airline studied fell into at least one category confirming the theory that all airlines have at least one of seven key elements, namely Icons of Distance and Space, Directionality, Speed, Nationhood, Motion, Flight and/or Name.

7. Conclusion

The aim of this paper was to discover how FSCs and LCCs differentiate themselves from one another by examining the key differences and similarities in tail fin design from the period

2000 and 2012, as well as discovering how these similarities and differences have evolved over time. Reviewing literature to explore the significance of an airline's brand, particularly in a non-price competitive situation, allowed a framework to be constructed that allowed successful separation of the two airline groups. Understanding the competition between the two airline groups and how they each branded themselves, coupled with the effects of the external events in the past decade allowed an in depth semiotic analysis of over 630 tail fins which gave the key similarities and differences in tail fin design between LCCs and FSCs.

An airline's visual brand, including the logo on their tail fin is one of the most important instruments used to gain attention, recognition and differentiation from other brands for any company trying to establish a corporate identity. They are the forefront of any airline trying to differentiate their price and non-price characteristics to their customers and Airlines are increasingly finding that utilising non-price elements of their business model can result in a competitive advantage over rivals, and they use their visual brand, their tail fin to do this. However, the research revealed that increased competition within the industry as well as external events such as the economy have forced some airlines to change their business strategies and, in turn, their visual brand. This was confirmed in the semiotic analysis of over 630 tail fins that revealed a change in the way FSCs and LCCs have visually branded themselves over time. This was achieved by looking at up to 60 different colours, icons and visual motifs.

FSCs and LCCs have actively changed the way they brand themselves through the use of their tail fin over time suggesting that the changing business models of FSCs and LCCs also cause a change in visual branding. Most significantly, the research revealed LCCs are moving towards the use of unconventional colours whilst icons of nationhood were seen to decrease. The decrease in icons of nationhood is possibly due to cabotage that allows internal operation in countries outside of the airline's registered country. However, nationhood remained popular for FSCs possibly due to the home country of the airline itself being a non-price competitive value to the airline. In addition, the ever-simplistic nature of LCCs business models is being mirrored in tail fin design, with the average number of icons and colours decreasing over the period studied, whilst FSCs remained static with their averages. Perhaps most significantly of all, icons of speed remained increasing popular for both airline choices whereas icons of flight decreased relatively proportionally to the increase in icons of speed, indicating that customer's attitudes have changed over time from what once was a pleasurable flight experience, to a speedy transportation service. LCCs show evidence that brand equity is becoming an increasingly important non price competitive weapon and as such the full name of the airline is being used at great frequency on the airline's tail fin. It suggests that, as an icon, the airline's 'name' should be added to the list of characteristics making the list seven key

characteristics: Distance and Space, Directionality, Speed, Nationhood, Motion, Flight and/or Name.

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