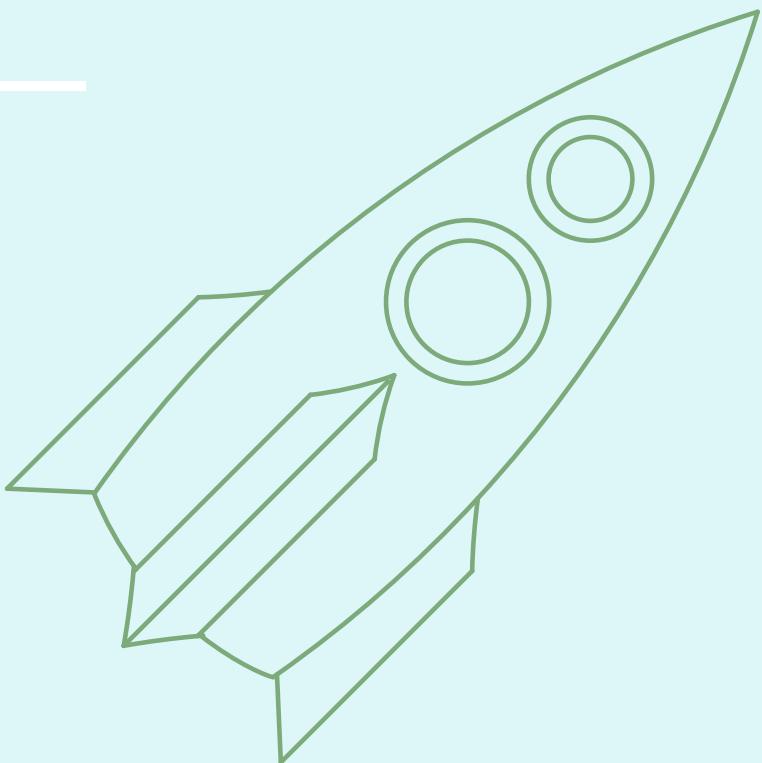


Case study: JetBlue

Applying Design Thinking
to enter the premium cabin
market

Word count: 1999



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1. THE ORGANISATION AND CONTEXT

1.1. INTERNAL SITUATION

JetBlue Airways is a major American low-cost airline, founded in 1998. JetBlue flies to 98 destinations in the USA and will expand to Europe in summer 2021. The fleet consists of 273 aircrafts of 9 types (6). The airline's key partners include aircraft producers, design studios, restaurants, materials & bed producers, beauty retailers (11). JetBlue has a brand reputation of being customer friendly (1). The airline had increasing numbers for revenue since 2012 (figure 21), however, there was a 63% decrease in revenue in 2020 and thus a reported loss of \$1,354 millions (3).

Until 2013, JetBlue only focused on economy class travellers, having the goal to be an “egalitarian airline” by offering free unlimited snacks and one free luggage. This changed since the launch of the business cabin “Mint” in 2014, when the airline’s value proposition looked different for the wealthy market segment – they wanted to offer the experience of “seamless living” during the flight (passengers living like at home) (12).

The Business Model Canvas

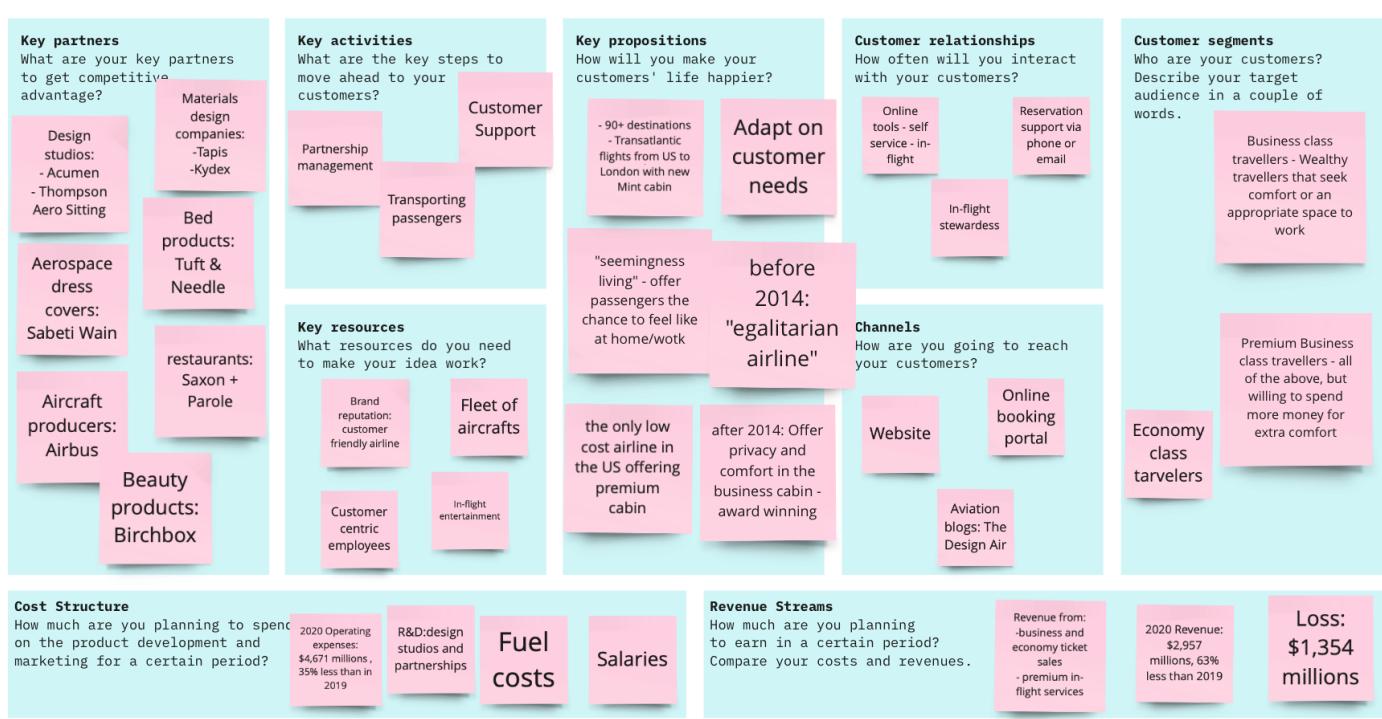


FIGURE 1 (1), (2), (3), (11)

1.2. EXTERNAL SITUATION

The loss in 2020 can be attributed to the external threat of the pandemic, which also affected regulations – flights were cancelled, self-distancing was required on board. However, Mat Clearly, director of Industrial Design at ACLA Studio, sees the pandemic as an opportunity to redesign the premium cabin to satisfy the previously undiscovered need for privacy and personal space. He observes that most business cabins, such as Lufthansa and Delta's cabins, are built with a 2-2 seat configuration, which means passengers have to climb over others to access the aisle (4).

JetBlue's 2014 Mint business cabin had a 2-2 configuration for all the seats except four (11). The 2021 Mint business cabin has full 1-1 configuration (1).

The Economist forecasts a post-pandemic boom in 2021, with America's and Britain's economy growing at least four percent faster than the previous year. People are willing to spend more and take risks after pandemics (17). This, together with the fact that JetBlue's premium product is cheaper than competitor's, represents a great opportunity to launch the new Mint. (the 2014 version of Mint's price started at \$599, and competitors' price started at \$2000 (12); the 2021 Mint starts at \$1000 (18))

POLITICAL	ECONOMIC	SOCIAL	TECHNOLOGY	LEGAL	ENVIRONMENT
Accidents risks - regulations for avoiding countries with war risk 2021: ease of COVID restrictions	Post pandemic boom forecasted by The Economist in 2021 in the US and Britain 2013: Wealthy people willing to pay for their needs	Even post COVID times, customers want more personal space and privacy in the business cabin post pandemic, people are willing to take more risks and spend more (The Economist) 2013: People want a premium product on longer flights	Self-service needs Need for personalised experience private Wifi and TV on board	2020: Many flights cancelled due to COVID 19 2020: Mask mandatory and self distancing required	COVID 19 pandemic affected travel laws and customer attitudes

FIGURE 2 (4), (5)- PESTLE

In 2019 (before pandemic), JetBlue positions itself as the sixth player in the US market, having 5.6% of the market share (13). Nonetheless, the airline's market share decreased to 4.7% in 2020. The competition is high, as 9 airlines own 90% of the market share (18). However, this means that the entry barriers are high, and the threat of new entrants is not significant.

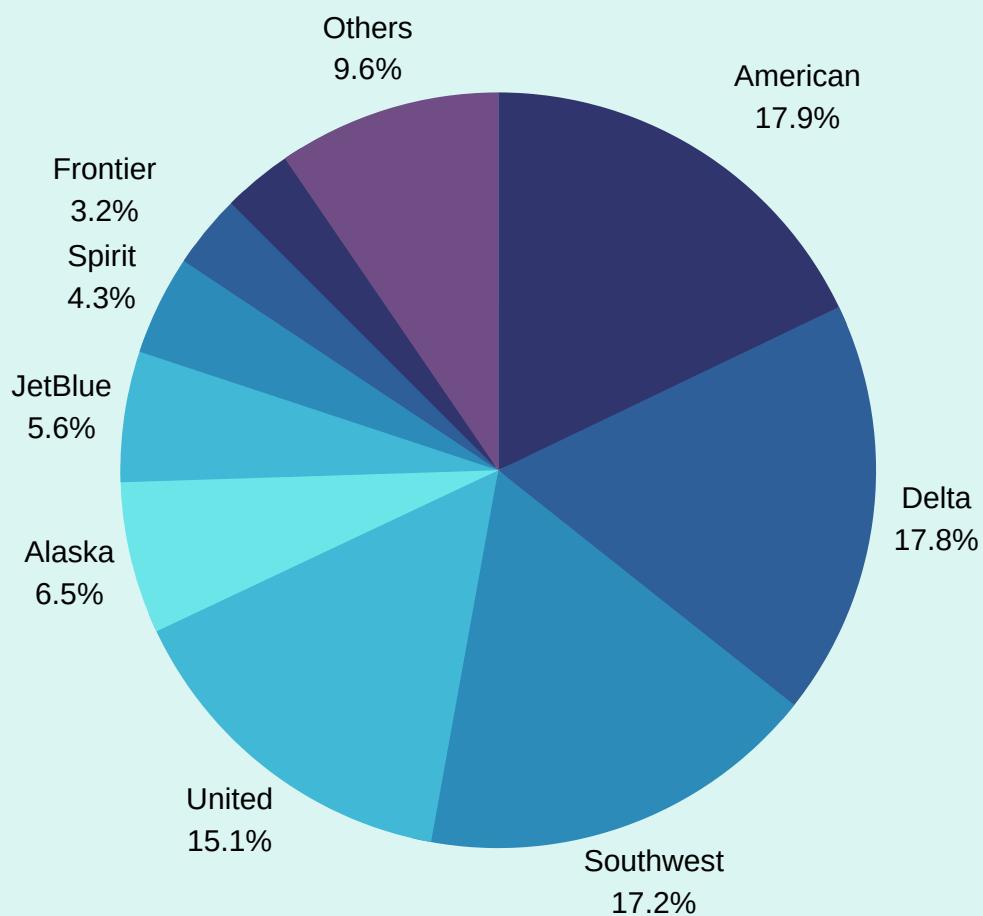


FIGURE 3 - US AIRLINE MARKET SHARE 2019
REMADE AFTER (13)



2. THE CHALLENGE

In 2012, JetBlue had 4% of the market share while these competitors had more than 10%.

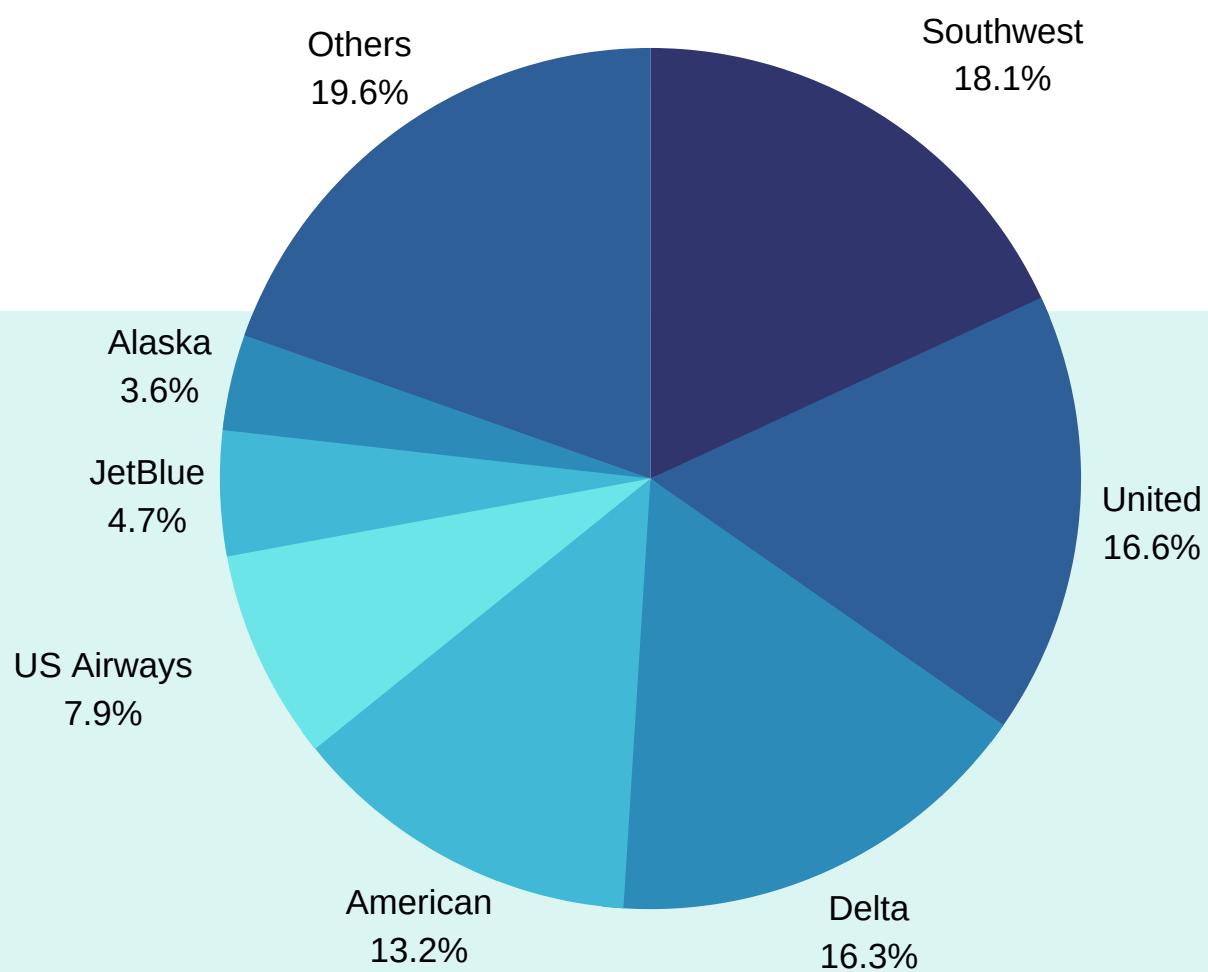


FIGURE 4 - US AIRLINE MARKET SHARE 2012
REMADE AFTER (14)

PROBLEM FOCUSED STAKEHOLDER MAP IN A TIMELINE

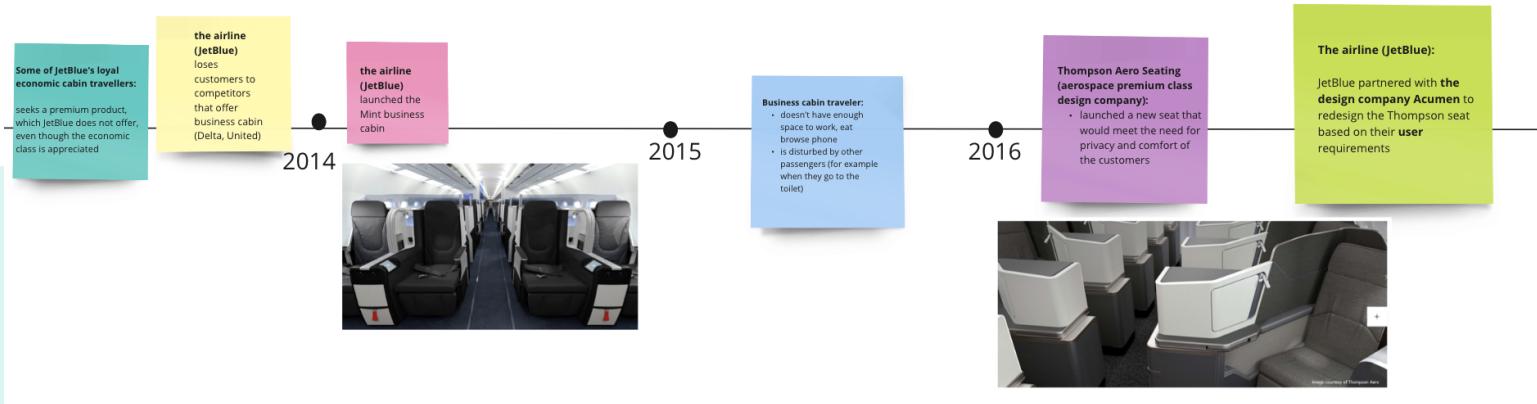


FIGURE 5

Jamie Perry (JetBlue's director of product development) explained that in 2012 the airline noticed that some loyal customers are turning their heads to competitors such as Delta, United or American because they offer the premium product that JetBlue is not (12), as until 2014 JetBlue only offered economy class service. The loss in customers occurred on long flights such as NY-West Coast.

The challenge for JetBlue was to offer a premium product for its customers – the airline managed to do this in 2014, when it became the first low-cost airline offering a dedicated premium product (6).

The 'Mint' cabin had a 2-2 configuration (Figure 5) on every seat except four, which meant the customers don't have direct access to the aisle, don't have enough space to multitask (eat, work, browse the phone) (9). Therefore, in 2016, JetBlue partnered with Acumen to redesign Thompson Aero's new cabin idea with 1-1 configuration (8) (see the seat in Figure 5) into a new Mint cabin. Acumen and JetBlue's challenge was to redesign the cabin based on JetBlue's customer requirements and brand.



A photograph of a vast, calm sea under a clear blue sky. The horizon is visible in the distance, and the water reflects the light blue of the sky. The overall scene is serene and expansive.

3. THE DESIGN THINKING APPROACH

The project was developed using the five components of Design Thinking. Two main iterations of the process took place from 2012 to 2021.



FIGURE 6 - THE DESIGN THINKING PROCESS

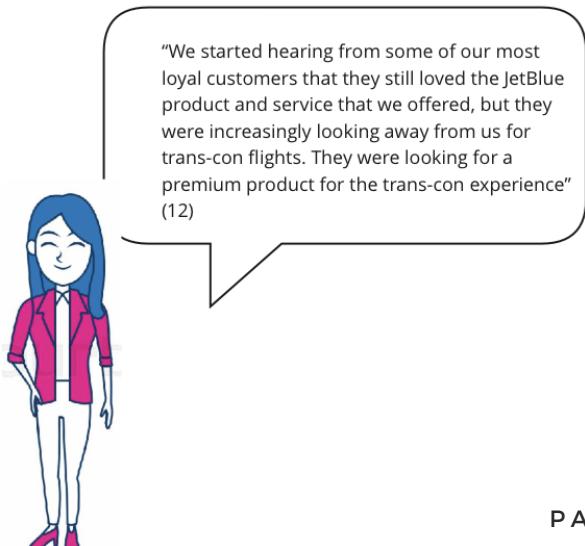
3.1. FIRST ITERATION

A) EMPHASIZE

As explained in section 2, the airline noticed in 2012 that it's losing loyal customers to competitors such as Delta or United. Michael Crump (Brand Experience Director at Acumen, who worked with JetBlue for several years) explains that the airline is tracking customer satisfaction through surveys and also feedback from its customer service centres (appendix).

B) DEFINE

Mariya Stoyanova, JetBlue's director of product development explained why some customers stopped using the airline. Apparently, there was a previously undiscovered market segment:



Based on the information Mariya revealed (12), I built a persona showing JetBlue's customer requirements:

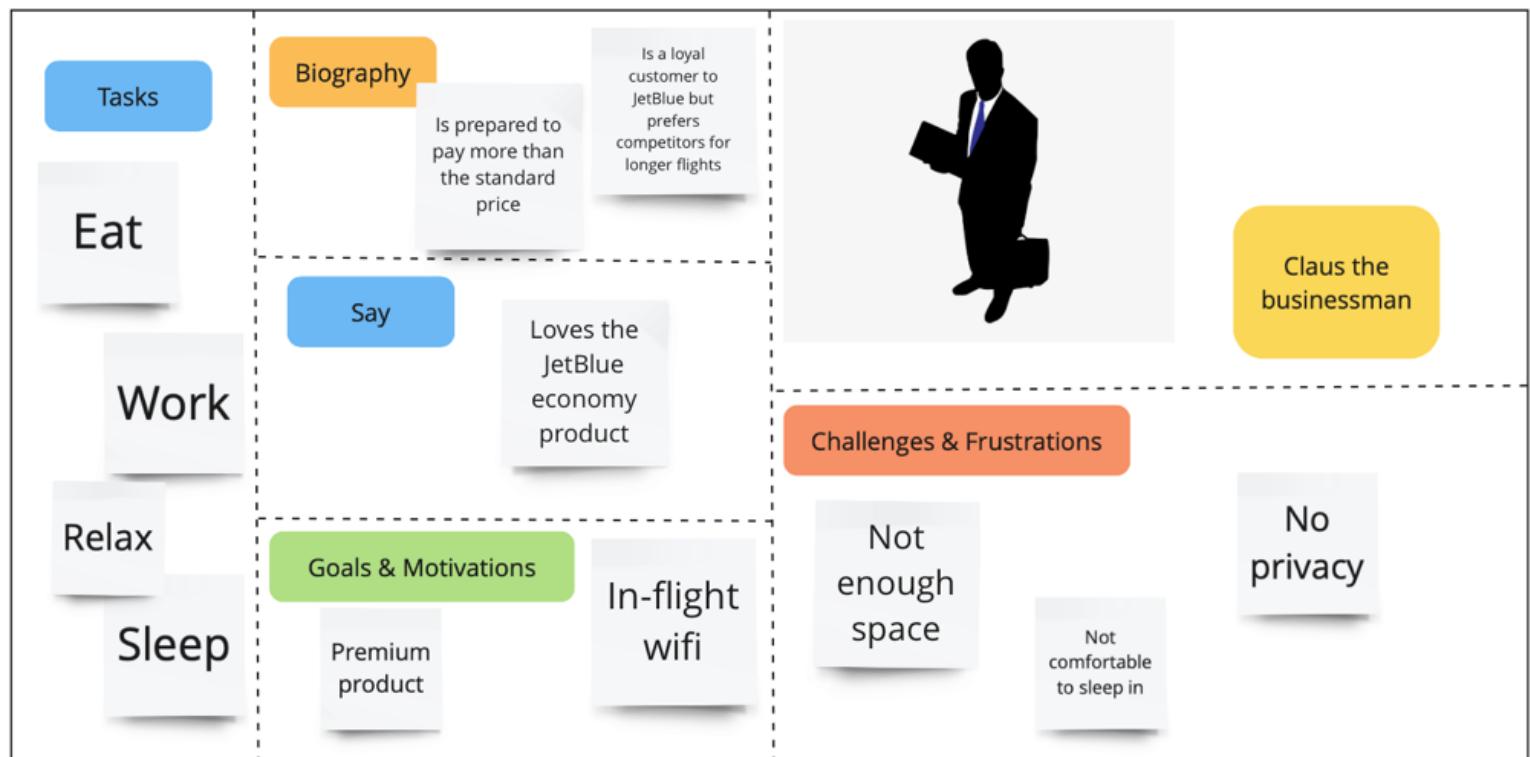


FIGURE 7

C) IDEATE, PROTOTYPE, TEST

Mariya Stoyanova has been working on a product that will satisfy the needs of the newly discovered persona for 2 years until the "Mint" product was tested on the market in 2014 (15). The 2014 Mint offered a fully lie-flat bed, averaging the longest and the widest in the US business class domestic market (Figure 8), the only private suites with closing doors in the American market, 4 on each flight (16) (Figure 9).

Moreover, customers can customize their meal choosing from 5 Tapas, prepared by JetBlue's partner Saxon+Parole. Customers are also offered customized amenity kits from the beauty retail partner, Birchbox and free Wi-fi.

It seems like the challenges of the persona created were solved and the goals were achieved. The feedback received was great for the airline, as customers said they "loved it" (15).



FIGURE 8 - MINT 2014(15)



FIGURE 9 - MINT 2014, PRIVATE SEATS (16)

3.2. SECOND ITERATION

A) EMPHASIZE

Even though Mint 2014 was a great success, the product and development team at JetBlue wanted to offer an evolved version of the product. This turned out to be very challenging given that the customers didn't have any negative thoughts about the product. JetBlue's approach was collecting observations by organising workshops with volunteer passengers that were required to sit in a mock-up of the space and do some normal tasks. (15)

Furthermore, JetBlue wanted to bring in talented individuals to the team, so they partnered with Acumen, the design house that produced the first-ever lie-flat bed for British Airways. (15)

Acumen's team wanted to understand the customer by experiencing the brand first-hand as a passenger. (1) The employees have never used the airline before as Acumen is based in London. This offered them the insights they needed to start.

B) DEFINE

My interview with Michael Crump and the interview with Acumen's design team on the DesignAir blog (1) helped me build a customer journey map with the key tasks and the pain/gain points for each (as discovered by Acumen and JetBlue). The main points to note are that customers need more privacy and a better-suited design to store belongings and multitask.

- Task
- Pain point
- Gain point

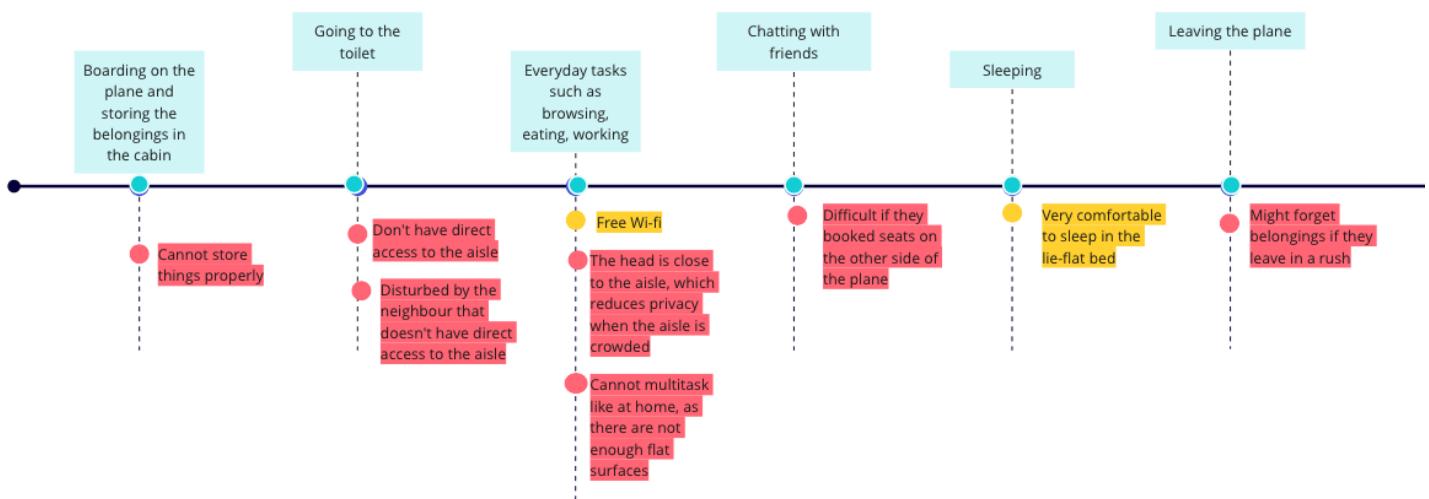


FIGURE 10 - CUSTOMER JOURNEY MAP

C) IDEATE

Michael Crump explained that JetBlue searched the market for a product that will satisfy the need for privacy for everyone. The only existing platform seat (a product that airlines buy and can customize) on the market was a concept from Thompson Aero (Figure 11). Thompson allowed JetBlue to be the first client and customize the seat more than usual. This seat had full 1-1 configuration and was rotated at 45 degrees to keep passengers' heads away from the aisle (to offer more privacy).



FIGURE 11

The ideas generated in this phase that were applied to modify Thompson's concept were:

Idea 1	Offer separate working spaces for different activities to allow multitasking: laptop (a drawer under the TV), personal items (a nook next to the seat), large overhead bins (1)
Idea 2	Partner with Tuft and Needle (mattress manufacturers) to improve the sleep experience even more – offer memory foam lined pillow (1)
Idea 3	The stowage for personal items to have a perforated lid to allow customers to check if they forgot any belongings (1)
Idea 4	Materials inspired by New York living, with different materials between seating and working area – to differentiate them (1)
Idea 5	Personalised mood lightning in each suite – “Awake” and “Relax” (9)
Idea 6	The front row seats – “Mint studio” to offer enough space for 2 (dual-use environment) – passengers can socialise, dine together, watch the same TV (1)

C) PROTOTYPE AND TEST

Michael Crump explains in my interview that Acumen had several design concepts before committing to a physical prototype.

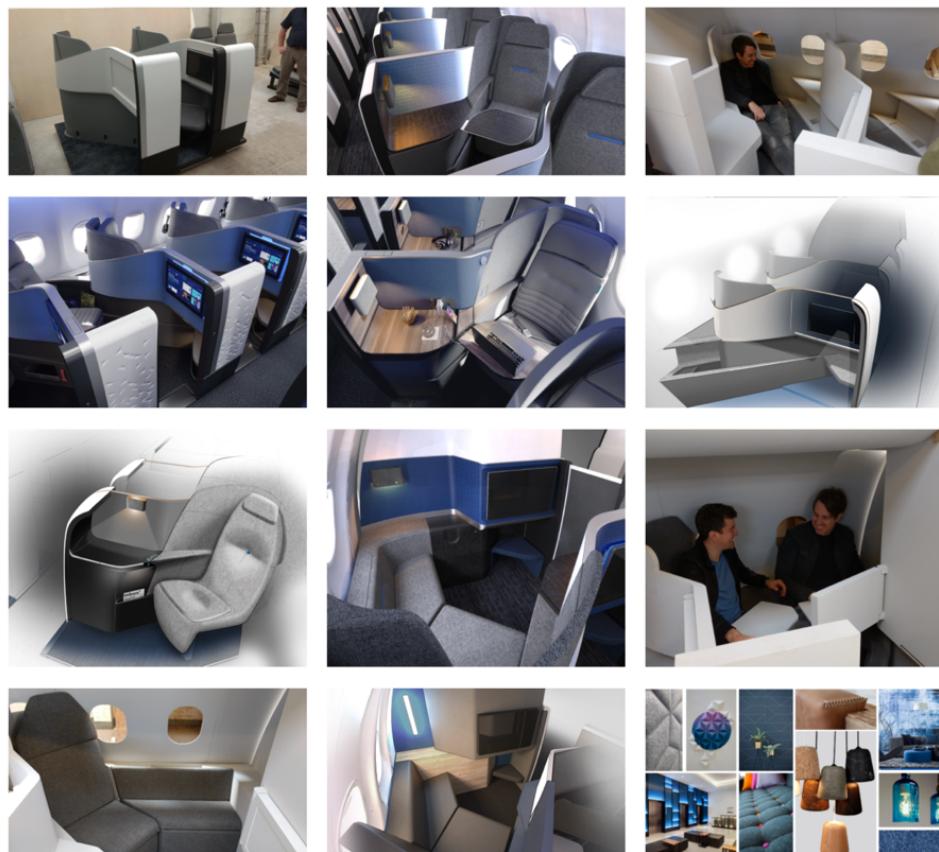


FIGURE 12 (1)

He continues by saying that Acumen sometimes tests the prototypes with customers, but JetBlue felt that they understood the customer very well. Therefore, only internal reviews were carried out – Acumen prepared 2 prototypes for JetBlue's engineering, cabin crew, maintenance, etc.

The first prototype was made from card board and foam core. Michael explained that after presenting the mock up to the client Acumen made some big changes related to the shapes between the seats (for privacy), different screen heights, and possible spaces where stowages could be located.

Afterwards, Acumen committed to a more expensive prototype using the feedback received. After the second review, only minor changes have been done – such as the position of headphone jacks, power plugs and minor design changes.

I believe that what could have been done better at this stage is JetBlue allowing Acumen to conduct external reviews with the actual customers, maybe by carrying out workshops with volunteer passengers like in the Emphasize phase. The benefit of this might be unlocking insights that the airline couldn't forecast.



4. THE OUTCOMES

4.1. PROJECT RESULTS

Customers can now book tickets for the flights with the new Mint cabin in August 2021 for just \$1000. (18)

The final product has aisle access for everyone, seats rotated at 45 degrees to keep passengers away from the aisle and doors, for privacy reasons.

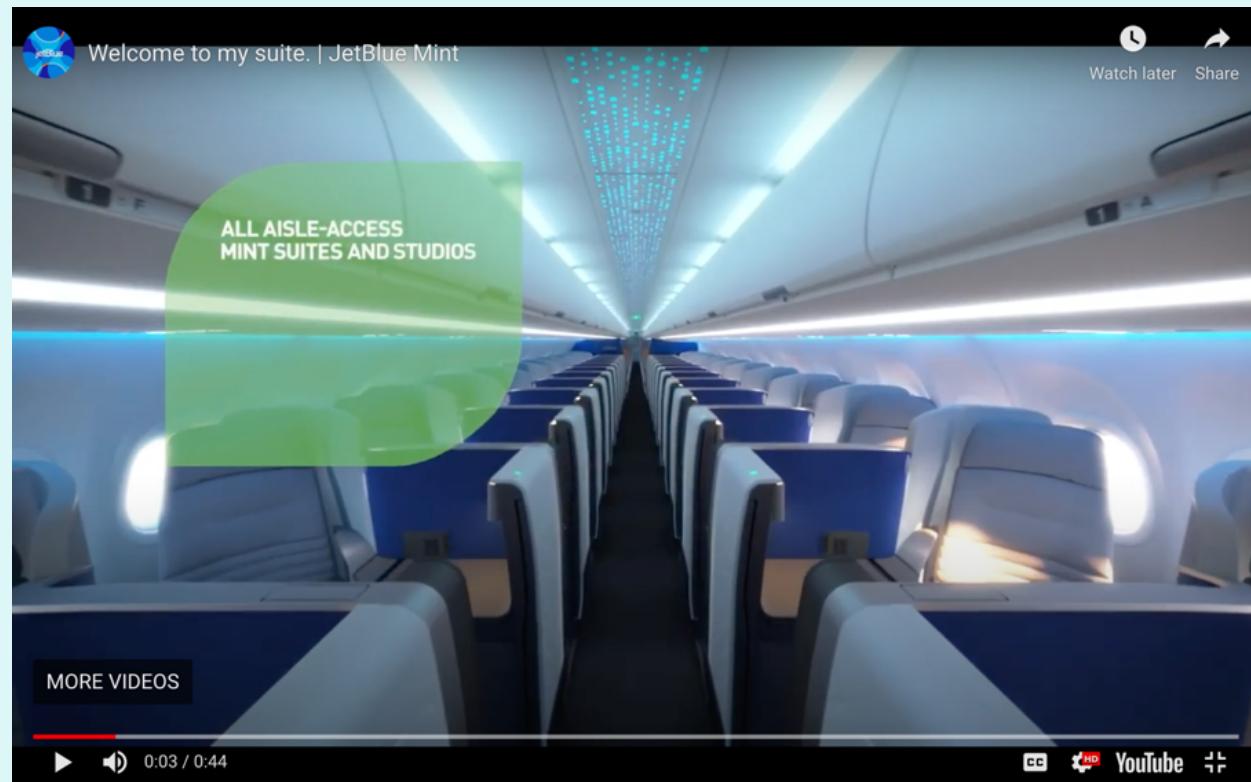


FIGURE 13 (1)

The fully flat beds have a memory foam lined pillow and convertible blanket with built-in pocket kit.



FIGURE 14 (1)

"Seamless living" design to allow multitasking and perforated lid for storage items to check if the customer forgot belongings.



FIGURE 15 (1)

The front row seats, Mint studio – bigger than the other suites and bigger than any other business class seat in the market – According to Michael Crump, this represents the “wow” factor, giving JetBlue a key USP in the market.



FIGURE 16 (1)

4.2. STAKEHOLDERS

The core stakeholder involved was Acumen's designers. Acumen's task was the most challenging as they had to be in constant communication with all the other parties involved. The customer had to be kept satisfied, so it was the airline's task to understand him and share the customer requirements with Acumen. Not being able to communicate directly with the customers represents a limitation for Acumen.

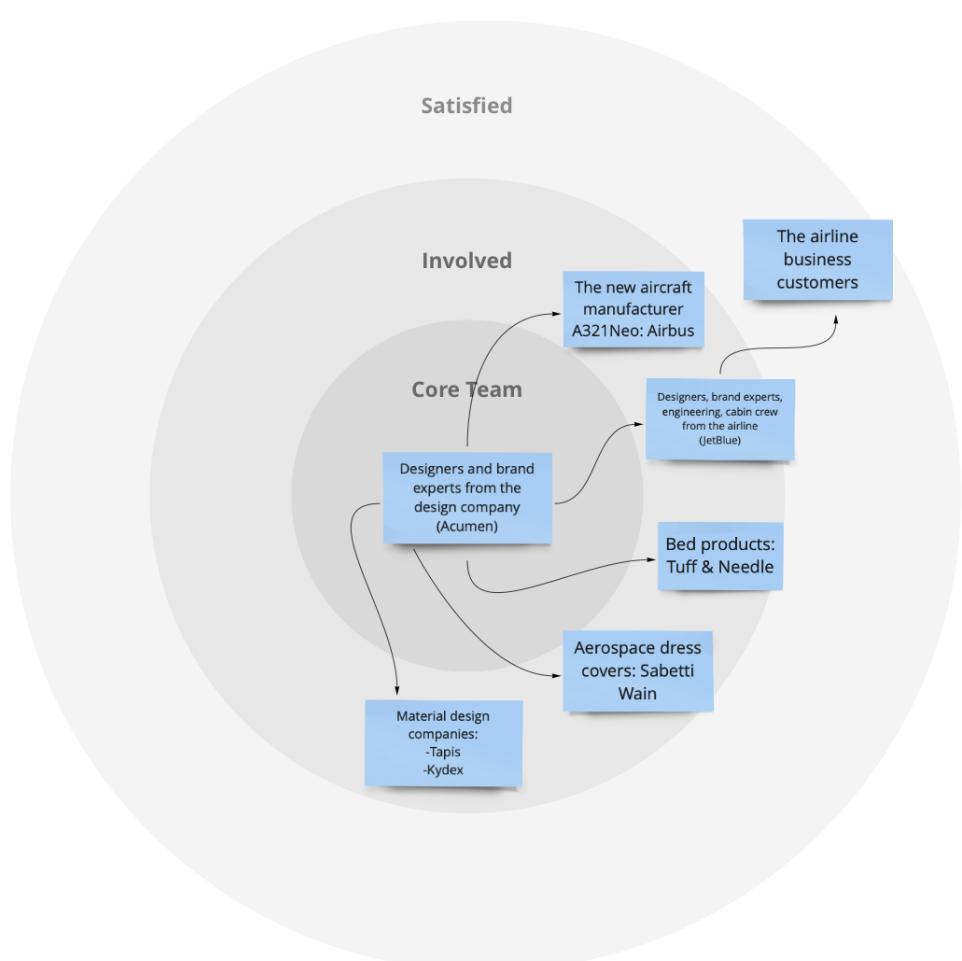


FIGURE 17

4.3. REFLECTION ON THE LONG-TERM IMPACT

Frog's report identifies five main criteria to evaluate the long-term benefit of design thinking.

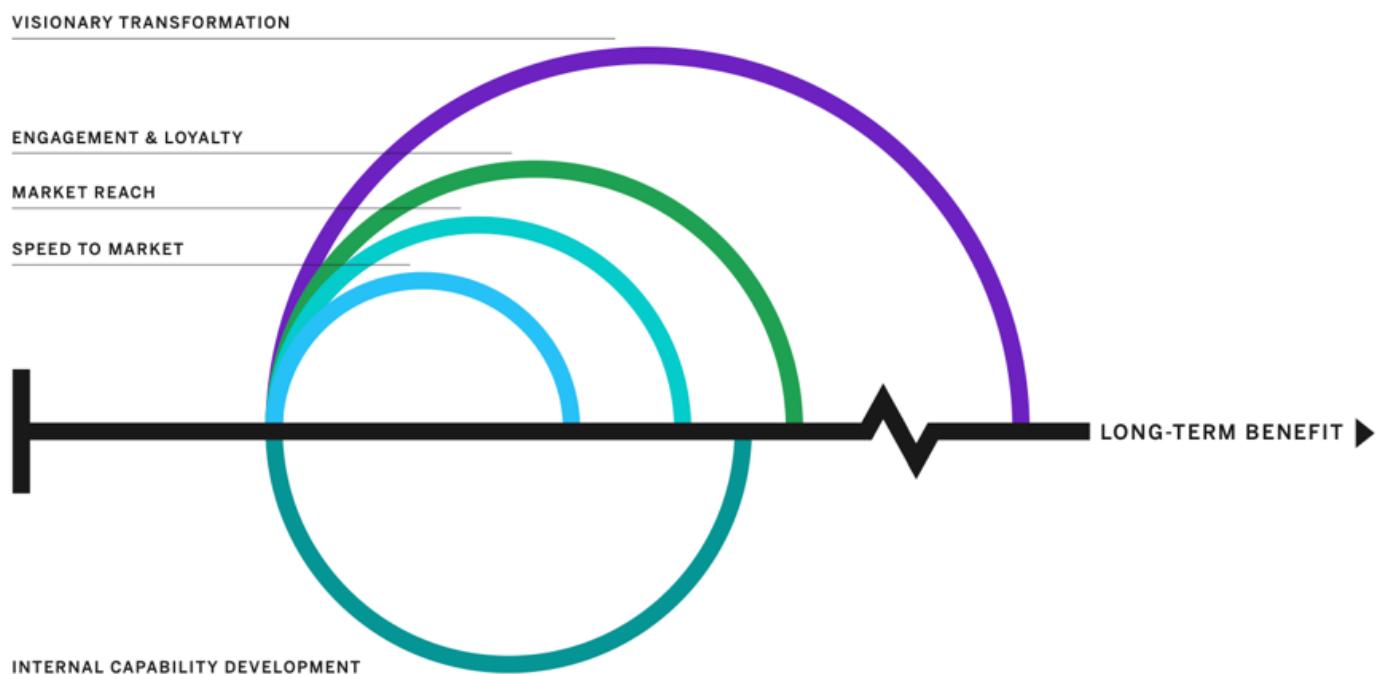


FIGURE 19 (20)

For the first Mint in 2014, the speed to market was exactly the industry average of 2 years as Crump explained. The second Mint, 2021, took 4 years as the new A321Neo aircraft was delayed by Airbus so JetBlue had to delay the design process. The potential benefits missed here: increased speed to market allows customer testing for gathering useful feedback for the next iterations.

The second Mint project had a great impact on JetBlue's development team – they partnered with a very innovative organisation (Acumen, famous for designing the first-ever lie-flat bed for British Airways (15)). The senior designer at Acumen said “It was very collaborative working with JetBlue, they'd constantly bring ideas to the table” (1) It seems like the project was beneficial for both teams. In McKinsey's report, nurturing top talent represents an indicator of success and a rare practice (only done by 8% of the companies surveyed). (21)

JetBlue and Acumen performed extensive market research with observations and experiencing the product. They managed to find a new persona and to discover the pain points in the customer journey. Also, JetBlue noticed they were losing loyal customers in 2012 so they created the Mint cabin to accomplish customer retention. This resulted in an increase in market share of 0.5% (2012 to 2019, Figures 4,5) after Mint 2014. In McKinsey's „Business Value of Design”, starting with the user in designing a product is a rare practice that only 8% of the companies surveyed do. (21)

As for *visionary*, The first Mint (2014) was described as a „disruptive innovation” and „loved” by customers as it offered the only suite with closing doors and the largest seat in the American market. (11)(15) The front row seats in the new Mint cabin (Figure 17) (JetBlue's award-winning product (9)) will definitely have an impact on the customers, as Michael Crump describes it as the „wow factor”.



5. APPENDIX

Annual Data Millions of US \$ except per share data	18-12-31	2017-12-31	2016-12-31	2015-12-31	2014-12-31	2013-12-31	2012-12-31
Revenue	\$7,658	\$7,012	\$6,584	\$6,416	\$5,817	\$5,441	\$4,982
Cost Of Goods Sold	\$3,090	\$2,525	\$2,104	\$2,302	\$2,775	\$2,764	\$2,551
Gross Profit	\$4,568	\$4,487	\$4,480	\$4,114	\$3,042	\$2,677	\$2,431
Research And Development Expenses	-	-	-	-	-	-	-
SG&A Expenses	\$2,338	\$2,158	\$1,961	\$1,804	\$1,525	\$1,358	\$1,248
Other Operating Income Or Expenses	\$-1,495	\$-932	\$-866	\$-749	\$-682	\$-601	\$-549
Operating Expenses	\$7,392	\$6,039	\$5,324	\$5,200	\$5,302	\$5,013	\$4,606
Operating Income	\$266	\$973	\$1,260	\$1,216	\$515	\$428	\$376
Total Non-Operating Income/Expense	\$-47	\$-55	\$-96	\$-119	\$108	\$-149	\$-167
Pre-Tax Income	\$219	\$918	\$1,164	\$1,097	\$623	\$279	\$209
Income Taxes	\$30	\$-222	\$437	\$420	\$222	\$111	\$81
Income After Taxes	\$189	\$1,140	\$727	\$677	\$401	\$168	\$128
Other Income	-	-	-	-	-	-	-
Income From Continuous Operations	\$189	\$1,140	\$727	\$677	\$401	\$168	\$128
Income From Discontinued Operations	-	-	-	-	-	-	-
Net Income	\$189	\$1,140	\$727	\$677	\$401	\$168	\$128
EBITDA	\$735	\$1,397	\$1,653	\$1,561	\$840	\$734	\$645
EBIT	\$266	\$973	\$1,260	\$1,216	\$515	\$428	\$376
Basic Shares Outstanding	313	329	327	315	295	283	282
Shares Outstanding	315	330	342	345	343	344	344
Basic EPS	\$0.60	\$3.47	\$2.23	\$2.15	\$1.36	\$0.59	\$0.45
EPS - Earnings Per Share	\$0.60	\$3.45	\$2.13	\$1.98	\$1.19	\$0.52	\$0.40

FIGURE 20 - FINACIAL STATEMENTS JETBLUE 2012-2017 (10)

Annual Data Millions of US \$ except per share data	2020-12-31	2019-12-31	2018-12-31
Revenue	\$2,957	\$8,094	\$7,658
Cost Of Goods Sold	\$1,515	\$3,039	\$3,090
Gross Profit	\$1,442	\$5,055	\$4,568
Research And Development Expenses	-	-	-
SG&A Expenses	\$2,142	\$2,610	\$2,338
Other Operating Income Or Expenses	\$-479	\$-1,120	\$-1,495
Operating Expenses	\$4,671	\$7,294	\$7,392
Operating Income	\$-1,714	\$800	\$266
Total Non-Operating Income/Expense	\$-179	\$-32	\$-47
Pre-Tax Income	\$-1,893	\$768	\$219
Income Taxes	\$-539	\$199	\$30
Income After Taxes	\$-1,354	\$569	\$189
Other Income	-	-	-
Income From Continuous Operations	\$-1,354	\$569	\$189
Income From Discontinued Operations	-	-	-
Net Income	\$-1,354	\$569	\$189
EBITDA	\$-1,179	\$1,325	\$735
EBIT	\$-1,714	\$800	\$266
Basic Shares Outstanding	278	297	313
Shares Outstanding	280	298	315
Basic EPS	\$-4.88	\$1.92	\$0.60
EPS - Earnings Per Share	\$-4.88	\$1.91	\$0.60

FIGURE 21 - FINACIAL STATEMENTS JETBLUE 2018-2021 (10)

MICHAEL WAS HAPPY TO HAVE A CHAT WITH ME ABOUT THE DESIGN PROCESS OF THE MINT CABIN

I read that one of the steps was that the Acumen design team flew and audit the existing product themselves. What else has been done to collect the customer requirements? Did Acumen or JetBlue carry out customer interviews or surveys on the previous Mint product?

"Like most airlines JetBlue constantly track customer satisfaction of onboard products through surveys and also feedback to its customer service centres. Over time the product development team at JetBlue would use these ongoing insights from customers to improve elements of their product and service. However for a major change and investment JetBlue conducted some initial qualitative research with their customers on the existing product - to help understand their needs and aspirations from a potential new product. The old Mint product had an inconsistent offer onboard which was a key issue for many customers.

JetBlue searched the market for a new Mint seating product that could offer the same proposition to all customers and would address the feedback they had- most predominantly around having aisle access for all. At the time there was only one 'platform' seat product for narrowbody aircraft in the market which was a concept from a company called Thompson Aero. (Note: A platform seat is an existing seat product that airlines buy and can customise to a certain degree to meet their brand needs). However as the Thompson Aero seat was an early concept and had not been fully engineered - they allowed JetBlue as the first customer, to customise the product more than usual - which is what acumen were able to do. Many of these enhancements we made can now be seen on the final Thompson Aero seat platform product being sold on their website - <https://www.thompsonaero.com/seating-range/vantagesolo/>"



MICHAEL CRUMP

BRAND EXPERIENCE
DIRECTOR AT ACUMEN

I have also noticed that multiple prototypes were created until Acumen reached the final version of the product. I was wondering if Acumen did any kind of testing on these prototypes? Were these prototypes shared with JetBlue to get feedback or were they tested with some customers for feedback?

"Acumen often produce mock ups and prototypes to prove a concept or design. Sometimes these are used for customer testing depending on budgets and the expertise within the airline. For JetBlue we created a row of 4 seats to validate the design changes and enhancements. JetBlue's development team are incredibly customer focused and they understood their customer requirements extremely well – and thus they conducted only internal reviews of the prototype with stakeholders – such as engineering, cabin crew and maintenance etc.

(Please note to your other point on timing : A usual project in aviation on this scale is a 24 month programme – to meet the engineering milestones etc. However this project was delayed by JetBlue as the new A321Neo aircraft from Airbus was delayed which meant they had to delay the design project)"

How many prototypes/initial concepts were created before reaching the final version?

"We had several design concepts , but only one was chosen to be created into a physical prototype. As explained the seat fundamentally did not change from the Thompson platform concept but acumen was able to redesign aspects of the seat to meet JetBlue's customer needs and address the insights we had gathered from our detailed flight audits."

What do you consider to be special and unique about the creation process Acumen used for the new Mint cabin?

"I think fundamental to the success of the design – was our collaboration with JetBlue's development team and immersion into the JetBlue brand and ideology. Significantly the flight audits enabled us to unlock a key insight and strategy which drove our design thinking – which we called 'Seamless Living' – and the ability to stay connected during flight . This seamless living - required the seat environment to work harder and be more effective as customers could multi task as they do at home or work. Being able to experience the product as a customer enabled us to gather real insights on how the product could be improved and designed. Being able to put yourselves in the customer / users shoes is essential to unlocking these fundamental ideas etc.

Another aspect about what makes acumen unique is that we are always pushing the boundaries to unlock innovation and add the wow factor. By reconfiguring the cabin layout in the front row, we were able to unlock a major innovation for JetBlue and invent the Mint studio – an impressively large suite which is bigger than any other business class seat in the market – and fundamentally has given JetBlue a key USP in the market."

So, you mentioned Acumen conducted internal reviews with JetBlue's engineering, maintenance, cabin crew... (the row of 4 seats). Did Acumen modify any features of the prototype after receiving the feedback from JetBlue? If yes, can you tell me what?

"I forgot to mention that we built a very rough spatial mock up first , which was made from card board and foam core. This was to help us check the dimensions and overall spatial design, as well as check the big features in the suite before committing to a more expensive prototype. We presented the spatial card mock up to the client and we made some big changes at that point, as we tested some different screen heights and shapes between the seats to check privacy. The mock ups also gave us early indications of where different stowages could be located for customer personal items etc.

When we reviewed the more refined prototype we made only minor modifications – such as the position of headphone jacks, USB ports and power plugs – and made some small changes to the styling – but nothing major."

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