



Forecasting with facts

2nd Annual Aviation
Forecasting Conference
Vienna 14th February

Global Travel & Transport Information Company

B2B

B2C

Advertising

Data Management Expertise

Passenger Aviation

Air Freight

Business Travel

Online Travel

Online Advertising

OAG. At the heart of air travel

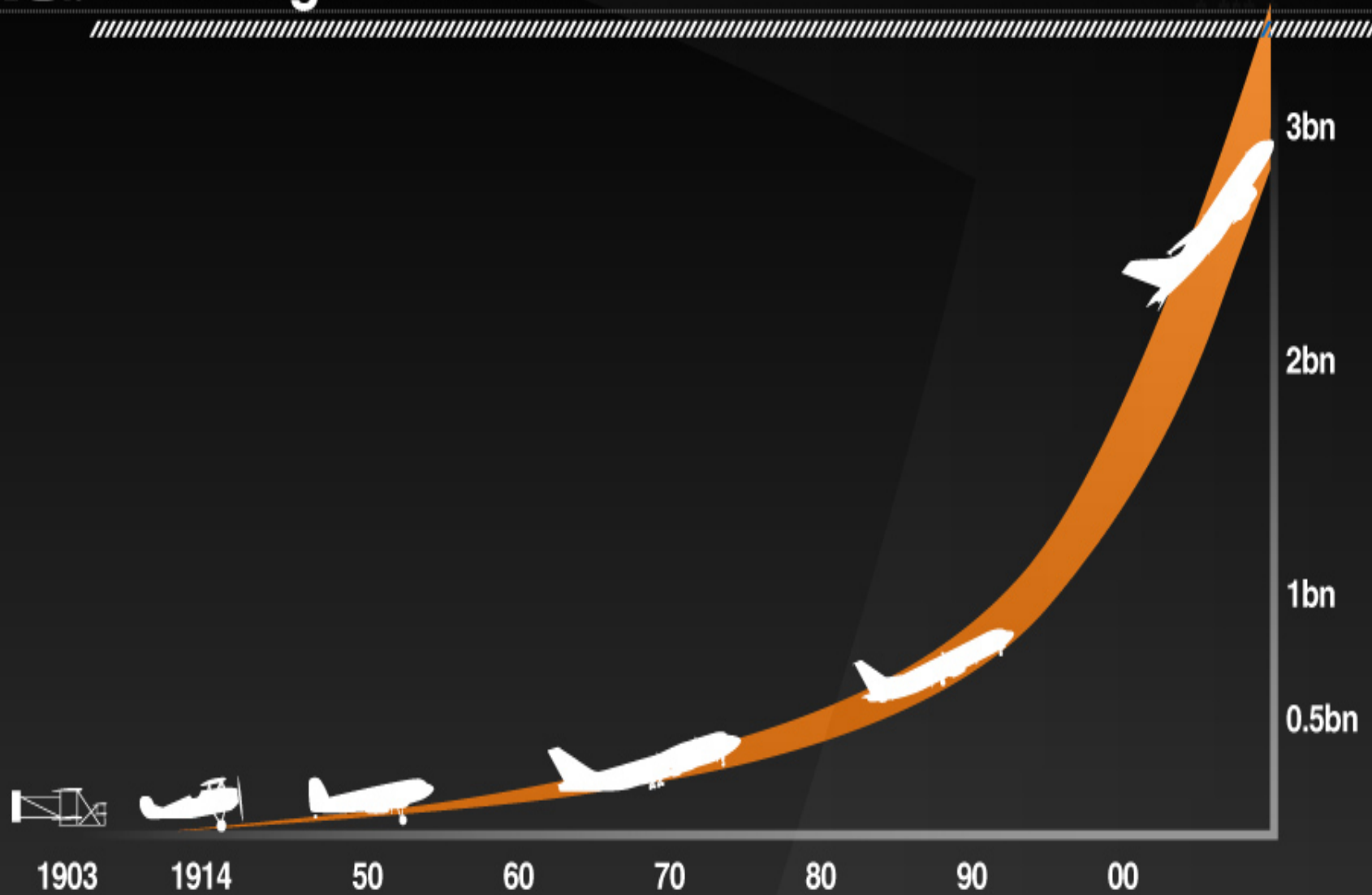




Forecasting with facts



OAG Passenger Growth



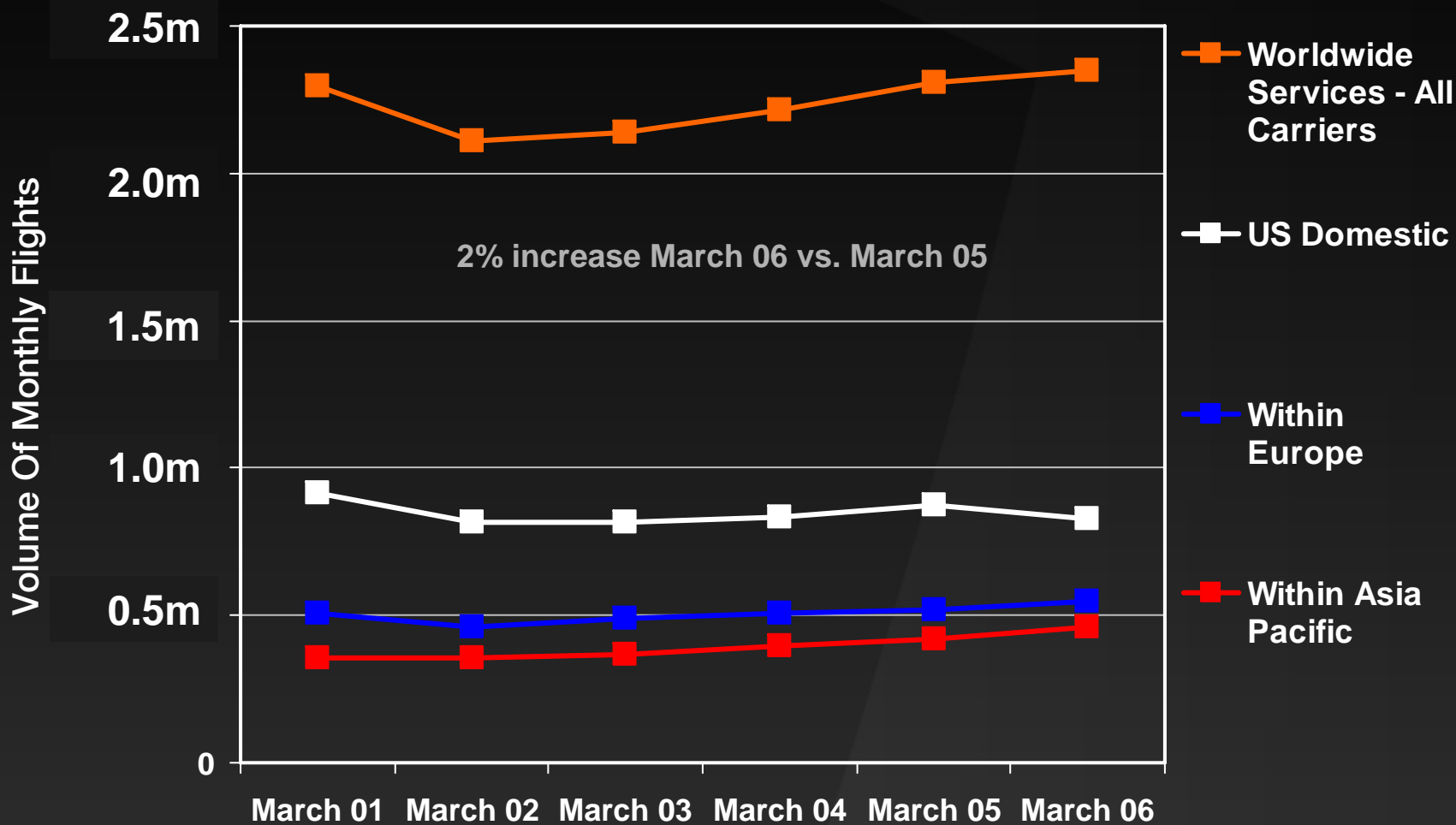


Worldwide Frequency & Capacity Outlook





Worldwide Frequency Trend 2001-2006: All Carriers



Source: OAG MAX



March 2001 vs. March 2006

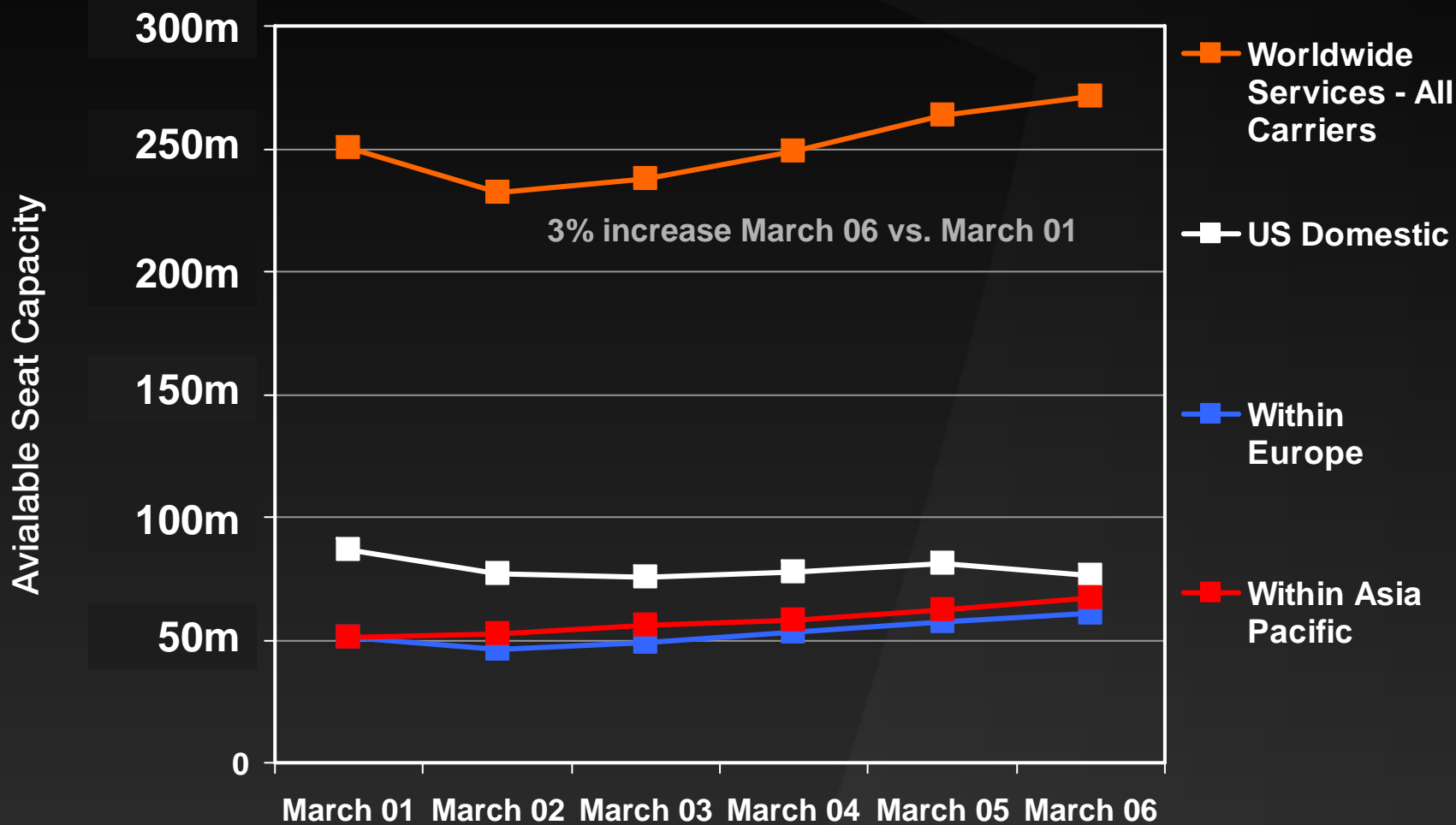
+2%

+52,000

flights



Worldwide Seat Capacity Trend 2001-2006: All Carriers



Source: OAG MAX



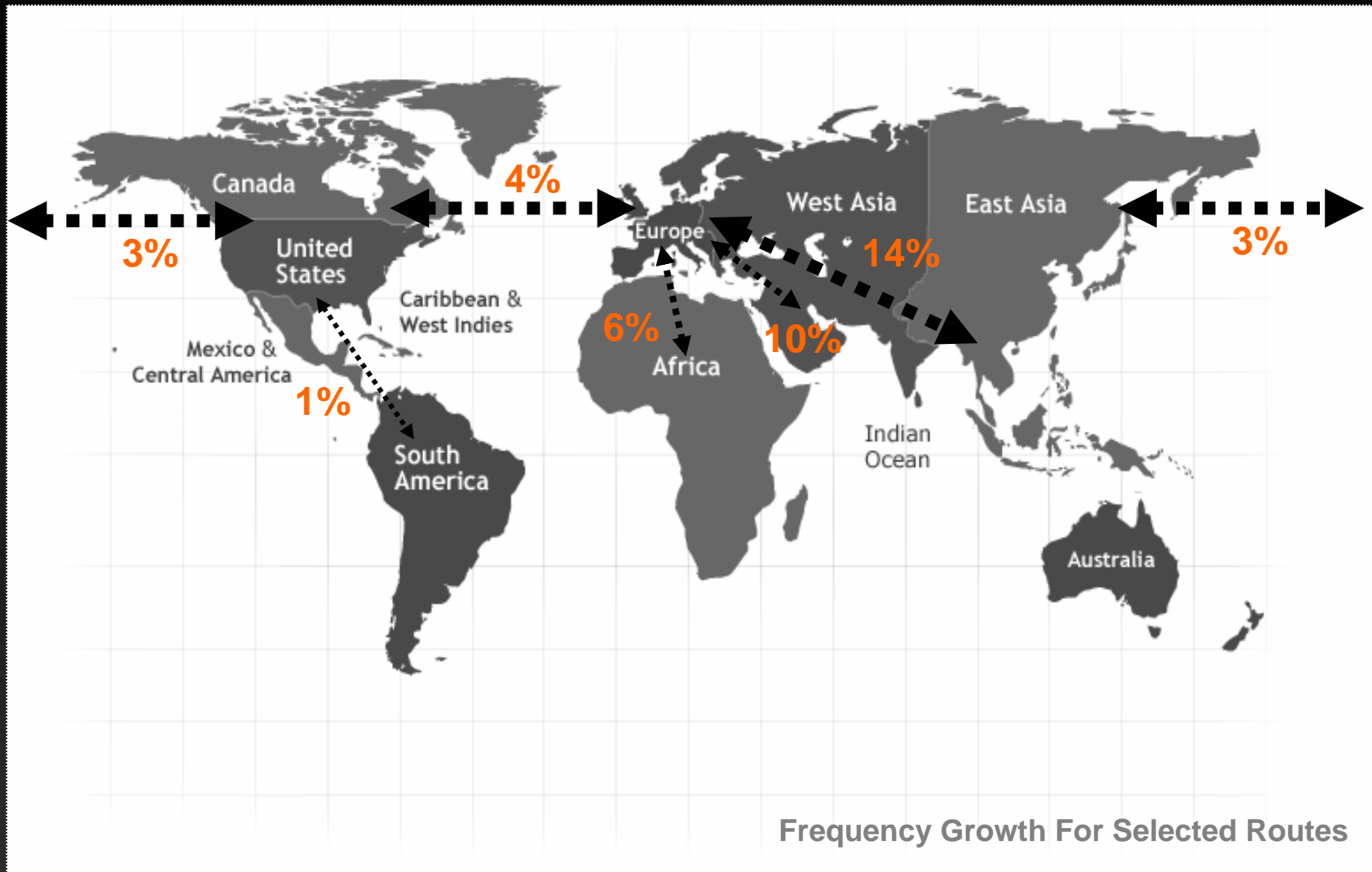
March 2001 vs. March 2006

+9%

+21m seats



March 2006 Outlook vs. March 2005





Year on Year Growth: March 2005 vs. March 2006

Transatlantic:

+900 flights per month

+245K seats per month

Transpacific:

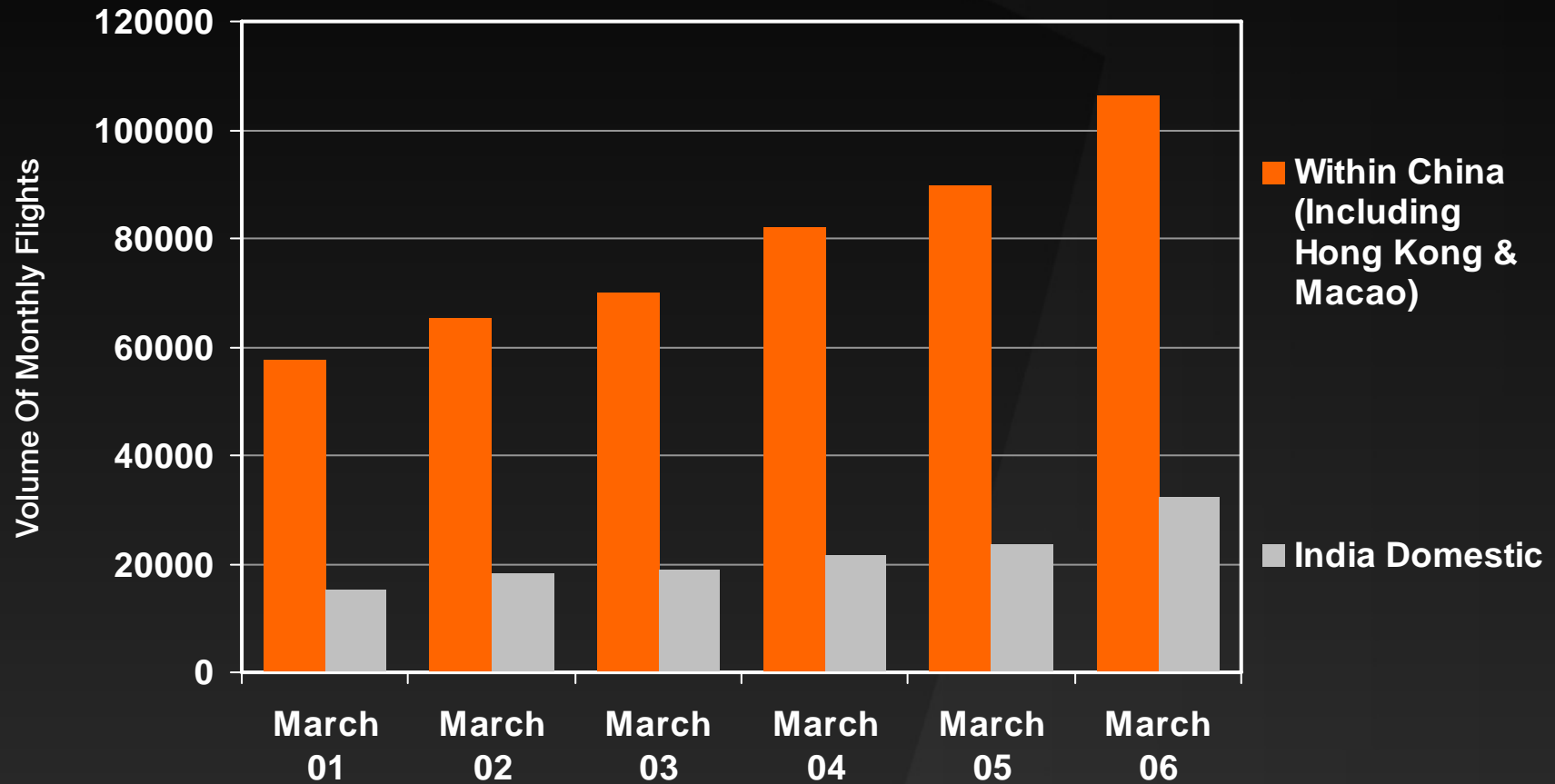
+250 flights per month

+70K seats per month





China & India - Frequency Trend 2001-2006: All Carriers



Source: OAG MAX



China Domestic Growth: March 2001 vs. March 2006

+84%

+49,000 flights



India Domestic Growth: March 2001 vs. March 2006

+114%

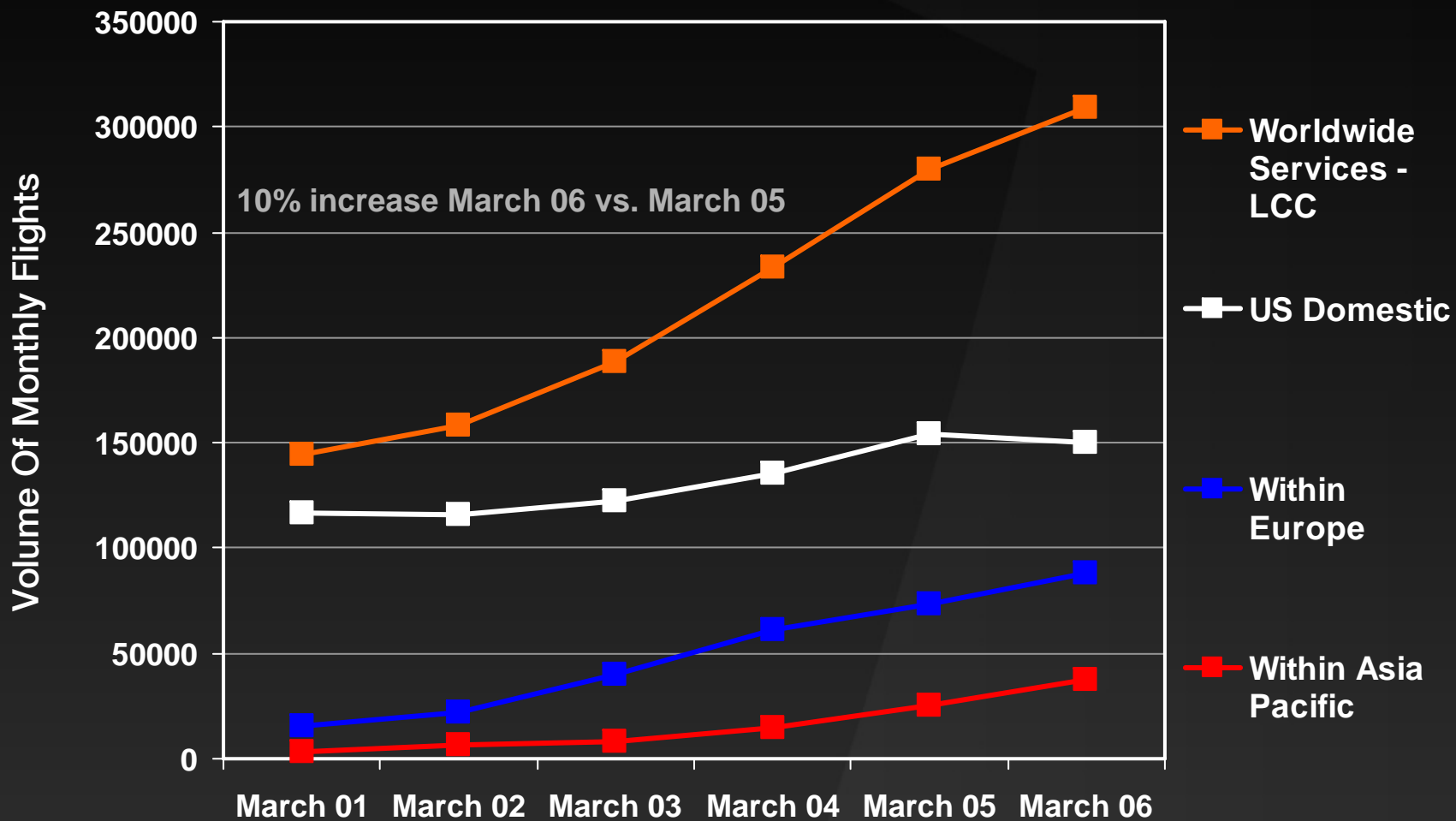
+17,000 flights



Low Cost Outlook



Worldwide Frequency Trend 2001-2006: Low Cost Carriers



Source: OAG MAX



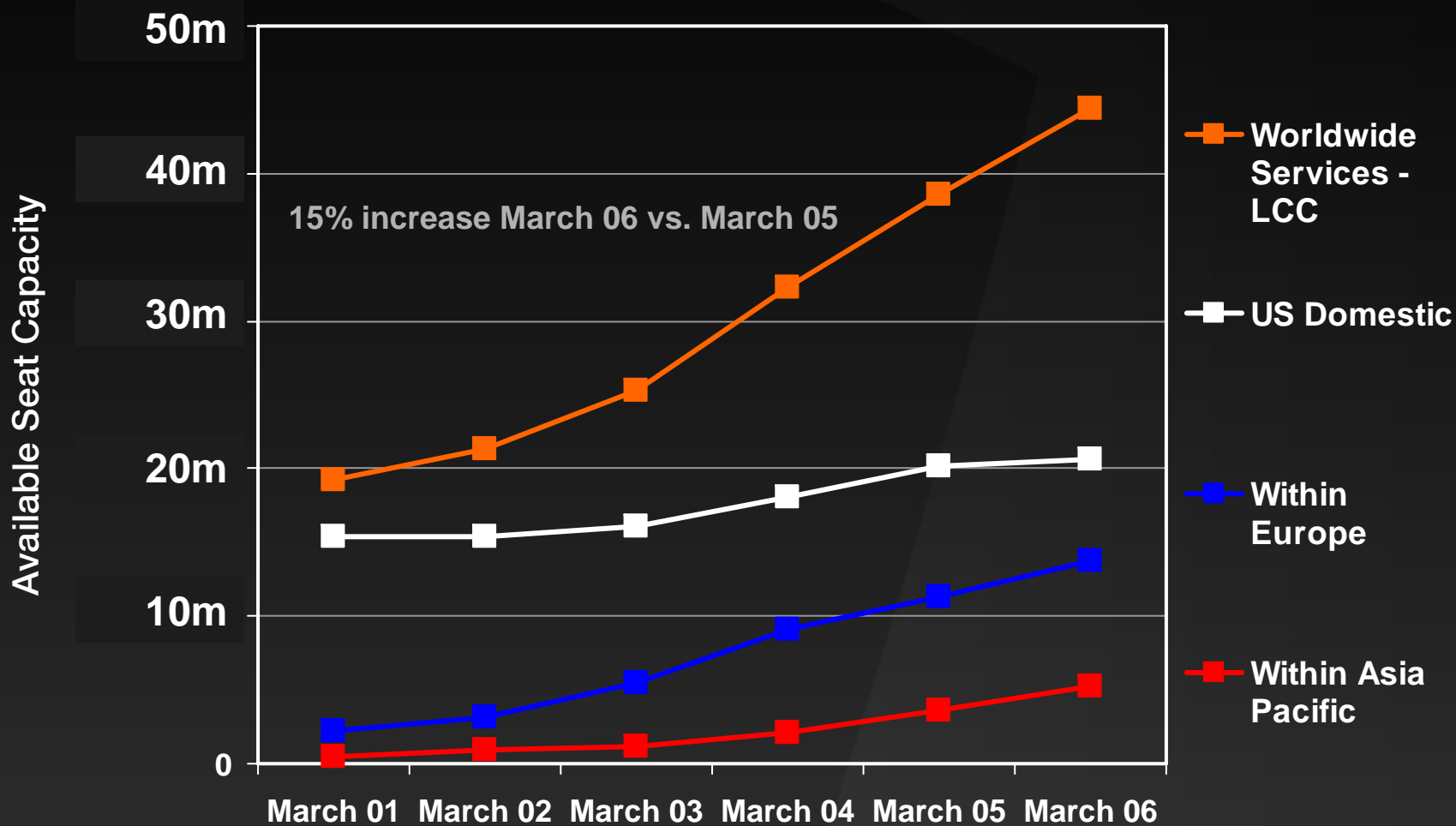
Low cost Growth: March 2001 vs. March 2006

+113%

+165,000 flights



Worldwide Capacity Trend 2001-2006: Low Cost Carriers



Source: OAG MAX



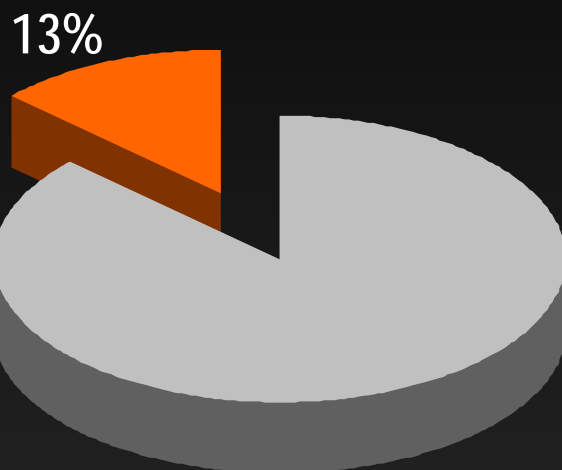
Low Cost Growth: March 2001 vs. March 2006

+130%

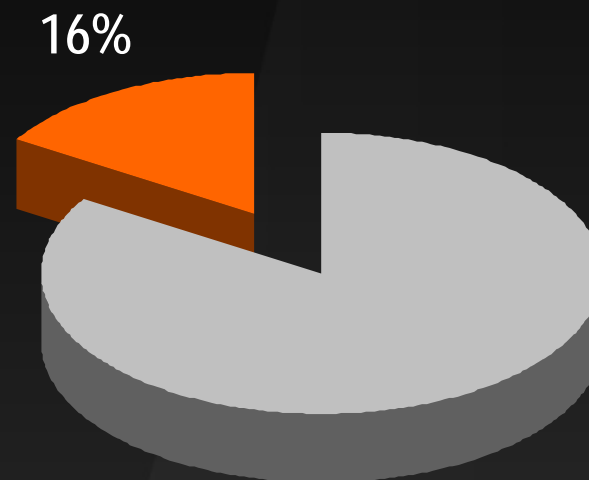
+25m seats



Worldwide: Low Cost Penetration March 2006



Number of flights



Number of Seats on LCC flights

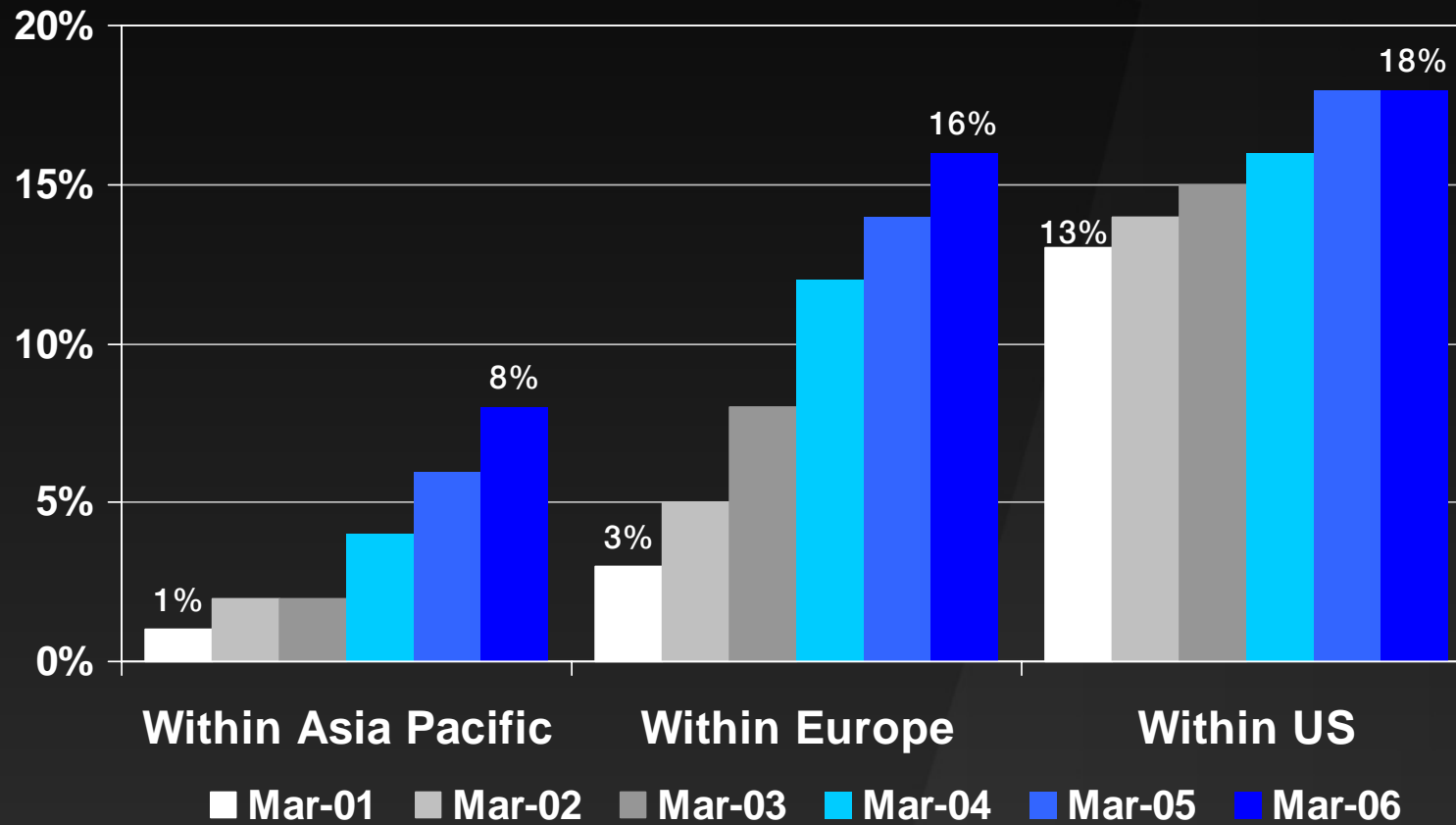


6 years: 6% to 13%

Another 3-5 to get to 25%?



Frequency of Flights on LCC vs. Total on All carriers





Low cost frequency: Penetration in March 2006

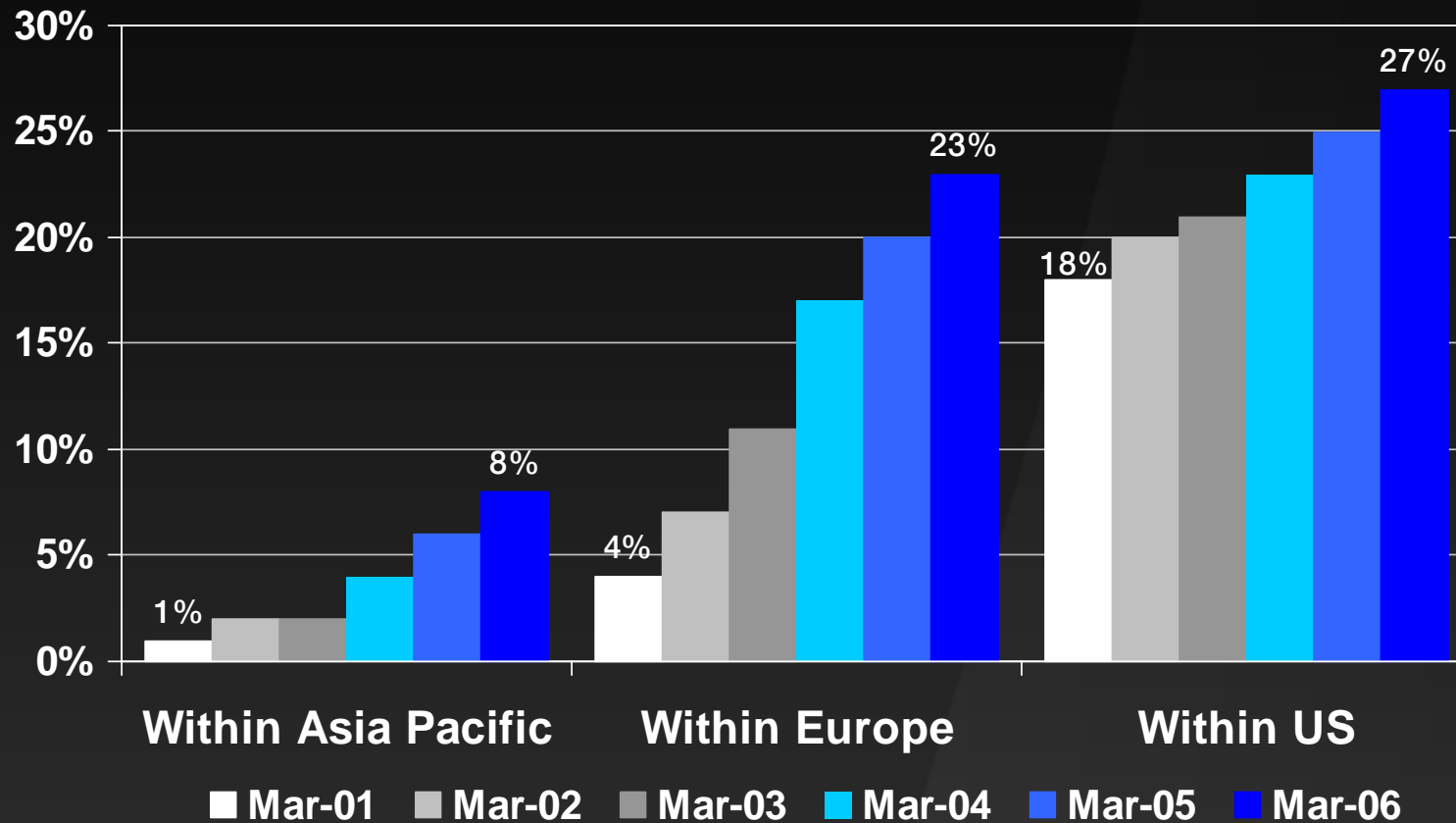
US 18% = 150K flights

Europe 16% = 88K flights

Asia/Pacific 8% = 38K flights



Seat Capacity on LCC vs. Total on All carriers





Low cost capacity: Penetration in March 2006

US 27% = 20.5m seats

Europe 23% = 14m seats

Asia/Pacific 8% = 5.3m seats



Independence Air & ATA:

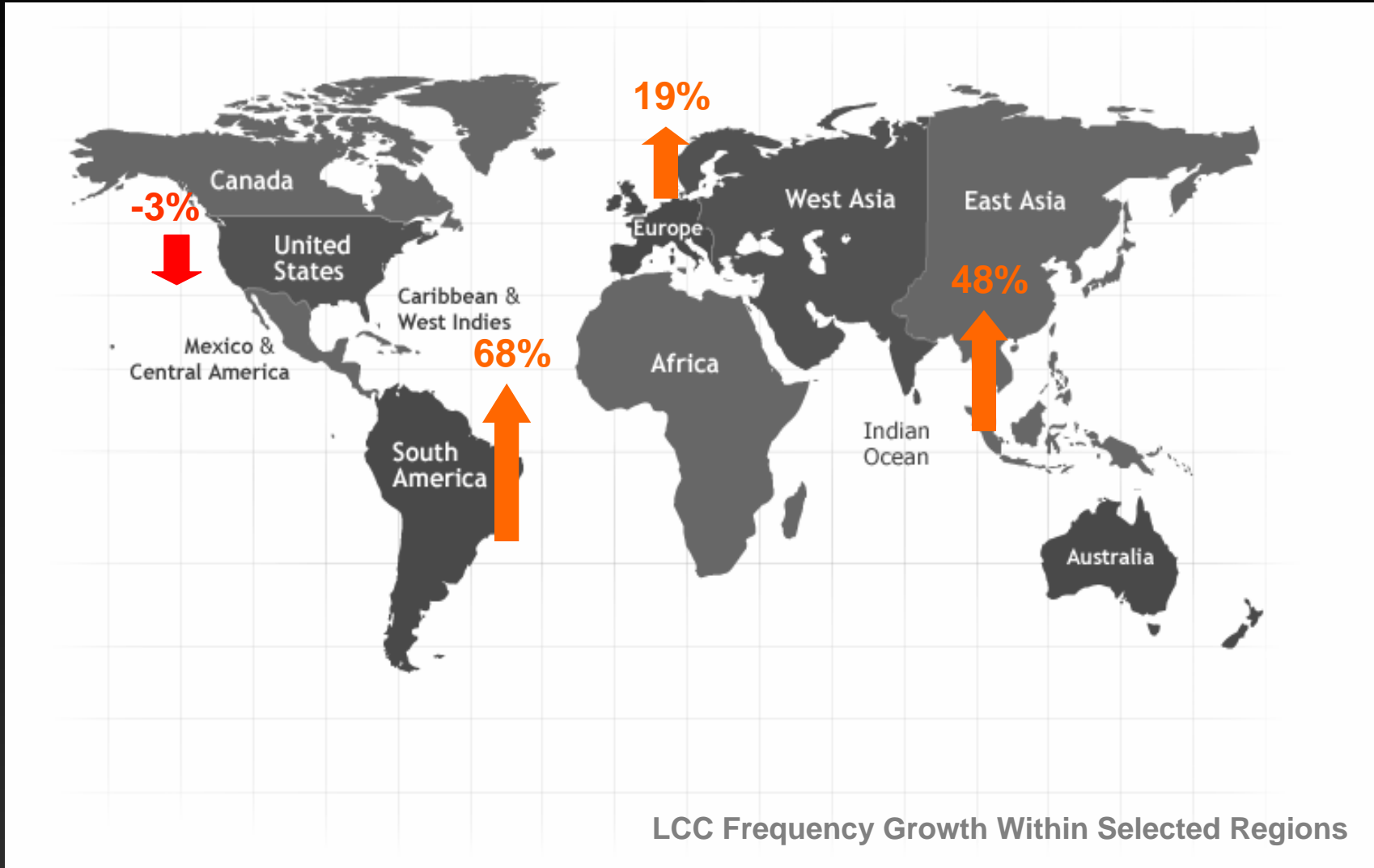
Reduction of 16K flights/month

Reduction of 1.2m seats/month



Low Cost Regional Outlook







Forecasting with facts - March 2006 vs. March 2005

30,000 more

European Flights



Forecasting with facts - March 2006 vs. March 2005

40,000 more

Within Asia/Pacific



Forecasting with facts - March 2006 vs. March 2005

16,500 more

Flights

Within China



Forecasting with facts - March 2006 vs. March 2005

9,000 more

Flights

Within India



Forecasting with facts - March 2006 vs. March 2005

28% more

Flights

To/From Shanghai (PVG)



Forecasting with facts - March 2006 vs. March 2005

10% more

Flights

To/From Beijing



Forecasting with facts - March 2006 vs. March 2005

68% more

Low Cost

Within Central/South America



Forecasting with facts - March 2006 vs. March 2005

4,000 more

Flights

Within Brazil



Forecasting with facts - March 2006 vs. March 2005

20% more

Flights

To/From Rio (GIG)



Forecasting with facts - March 2006 vs. March 2005

19% more

Flights

To/From Sao Paulo



Forecasting with facts - March 2006 vs. March 2005

14,000 more
Low Cost Flights
Within Europe



Forecasting with facts - March 2006 vs. March 2005

7,000 more
Low Cost Flights
Within India



Forecasting with facts - March 2006 vs. March 2005

35% more

Flights

To/From Delhi



Forecasting with facts - March 2006 vs. March 2005

35% more

Flights

To/From Kolkata



Forecasting with facts - March 2006 vs. March 2005

34% less

Flights

To/From Washington
Dulles (IAD)



Forecasting with facts - March 2006 vs. March 2005

14% less

Flights

To/From Pittsburgh
(PIT)



Forecasting with facts - March 2006 vs. March 2005

3,000 more

Flights

To/From Middle East



Forecasting with facts - March 2006 vs. March 2005

16% more

Flights

To/From Bahrain



Forecasting with facts - March 2006 vs. March 2005

1,400 more

Flights

To/From Dubai



Forecasting with facts - March 2006 vs. March 2005

48% more

Inter-Asia Low Cost



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Forecasting with facts

