



OAG FACTS AUGUST 2009: EXECUTIVE SUMMARY

GLOBAL AIRLINE CAPACITY SHOWS MARGINAL GROWTH AFTER A YEAR OF DECLINE, REPORTS OAG, AS AUGUST FIGURES ARE RELEASED

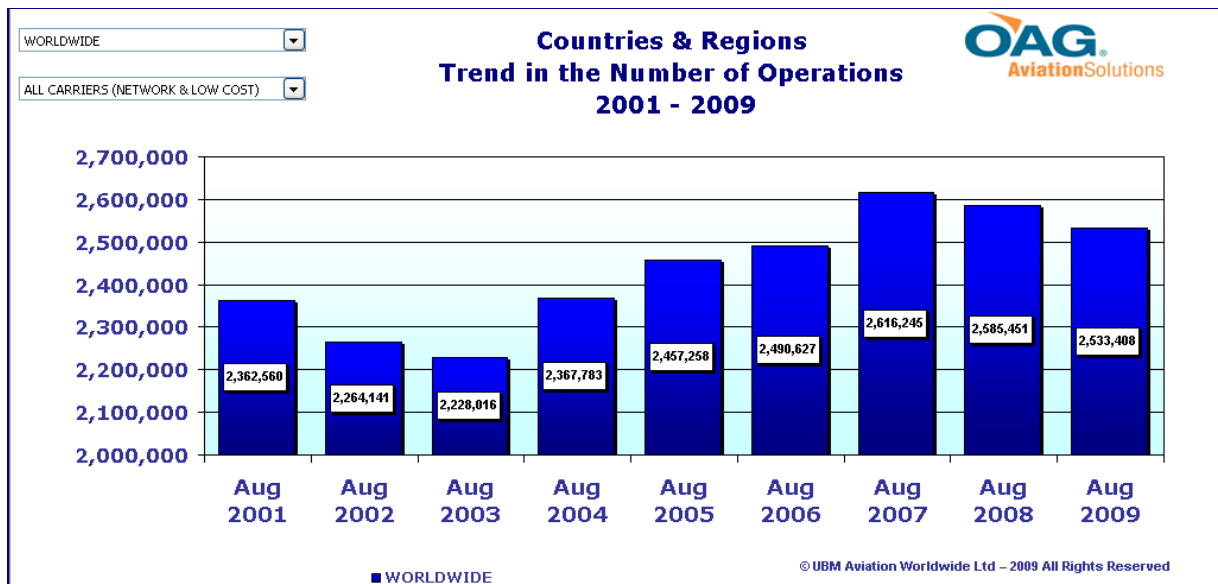
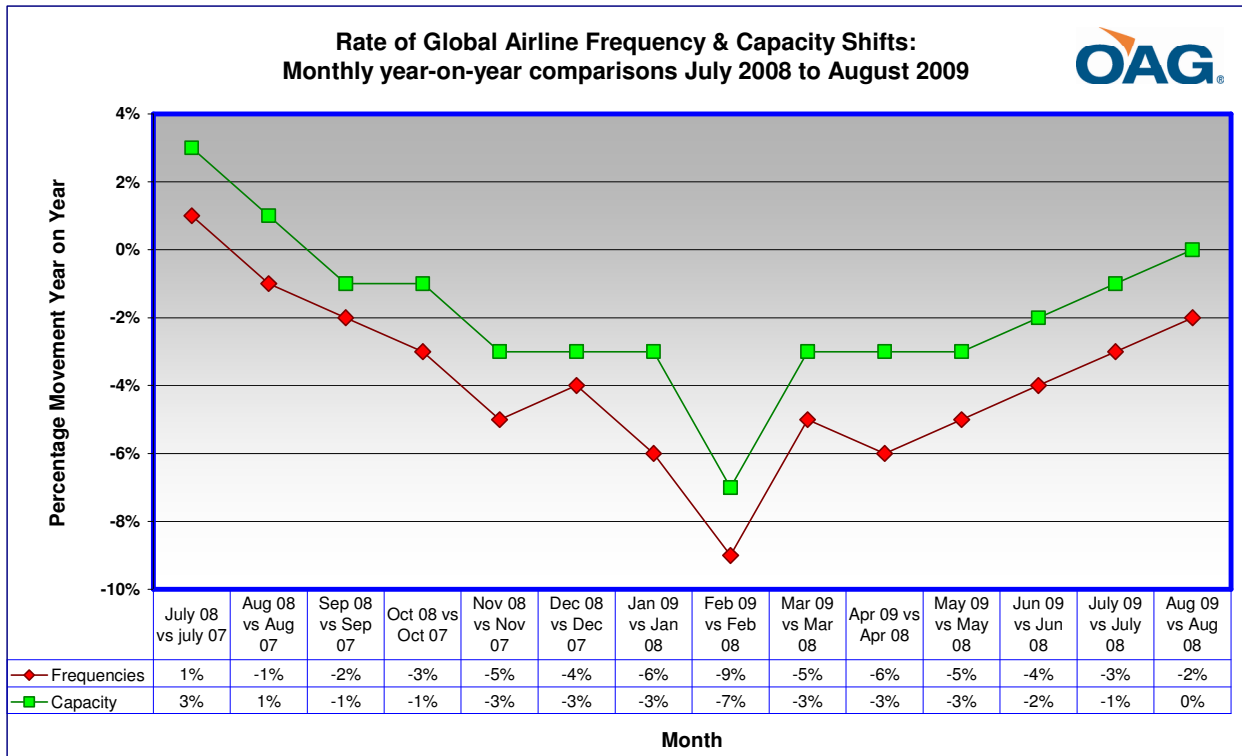
Growth of 0.2% compared to August 2008

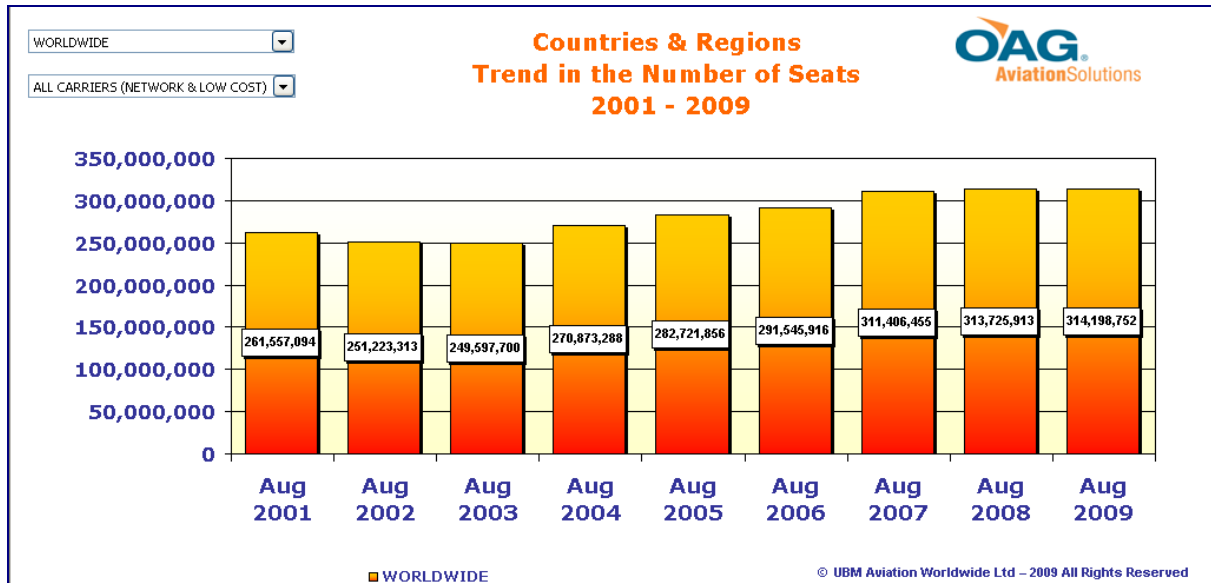
Global airline capacity is showing marginal growth for August 2009, the first month of positive growth for a year, reports OAG, (www.oagaviation.com), the world's leading aviation data business, as it releases its monthly report on trends in the supply of airline flights and seats. The world's airlines have 314.2 million seats on offer this month, a rise of 0.2% (472,839 more seats) over August 2008 levels.

David Beckerman, vice president OAG Market Intelligence, said, "After a year of capacity cutbacks, it is encouraging to see positive numbers in the year on year comparisons. August is traditionally one of the busiest months for air travel, and it will be interesting to see if the steady upward trend we have seen since May continues once the summer vacation season draws to a close."

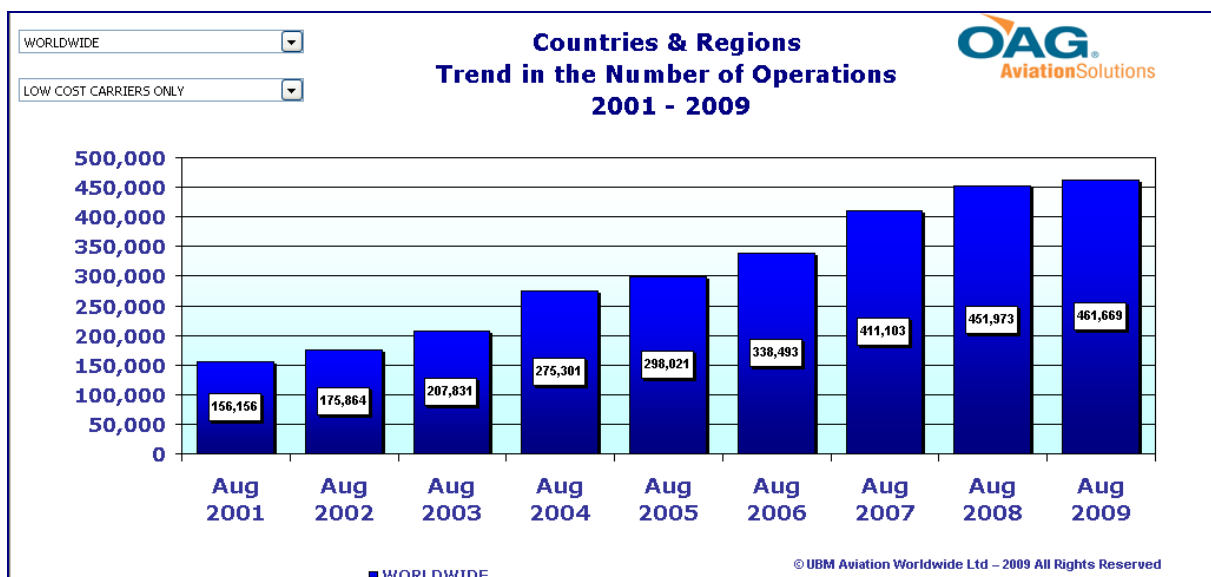
Frequencies remain down compared to August 2008, however. The world's airlines have scheduled a total of 2.53 million flights for August 2009, down by 2% (52,043 fewer flights) compared with the same month last year. Last month, the year on year global frequency figure was down by 3% and capacity was down by 1%.

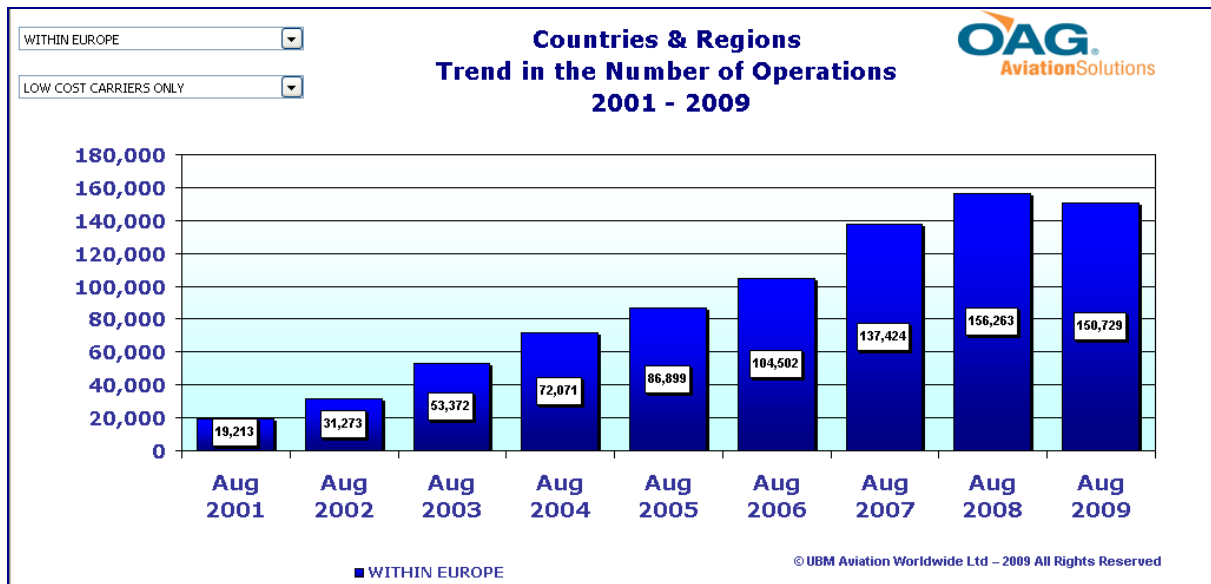
The month by month trend since the start of the economic downturn can be seen in the chart below:





Within this global figure of all scheduled passenger flight operations, the Low Cost sector accounts for 461,669 flights (18.2%) and 68.6 million seats (21.8%). Worldwide, frequencies and capacity in the Low Cost sector are up by 2% compared to a year ago. When this is analysed by region, there is healthy growth to/from and within all regions with the exception of low cost services within Europe (4% fewer flights and 3% fewer seats) and within North America (8% fewer flights and 9% fewer seats).





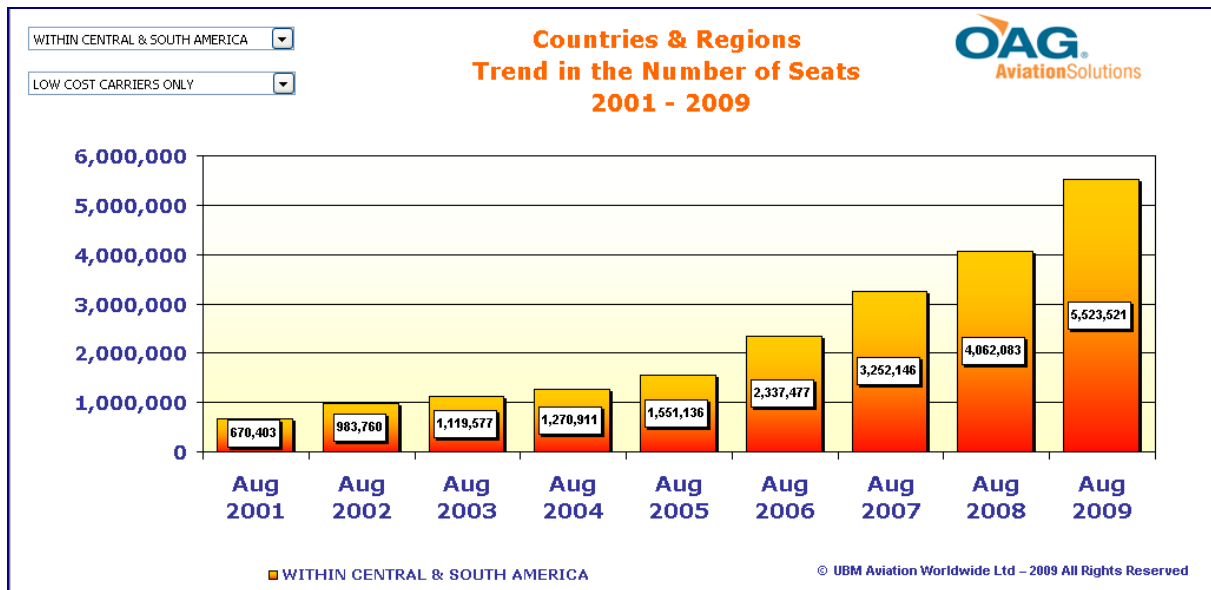
The figures are revealed in the August 2009 edition of OAG FACTS (*Frequency & Capacity Trend Statistics*), the dynamic monthly market intelligence tool providing the latest data on current passenger airline activity around the world.

Analysis by Region:

International services to and from **Europe** are showing virtually no change in frequencies or capacity compared to August 2008. Flight schedules within the region are not holding up so well, with 6% (37,689) fewer flights and 4% (2.8 million) fewer seats year on year.

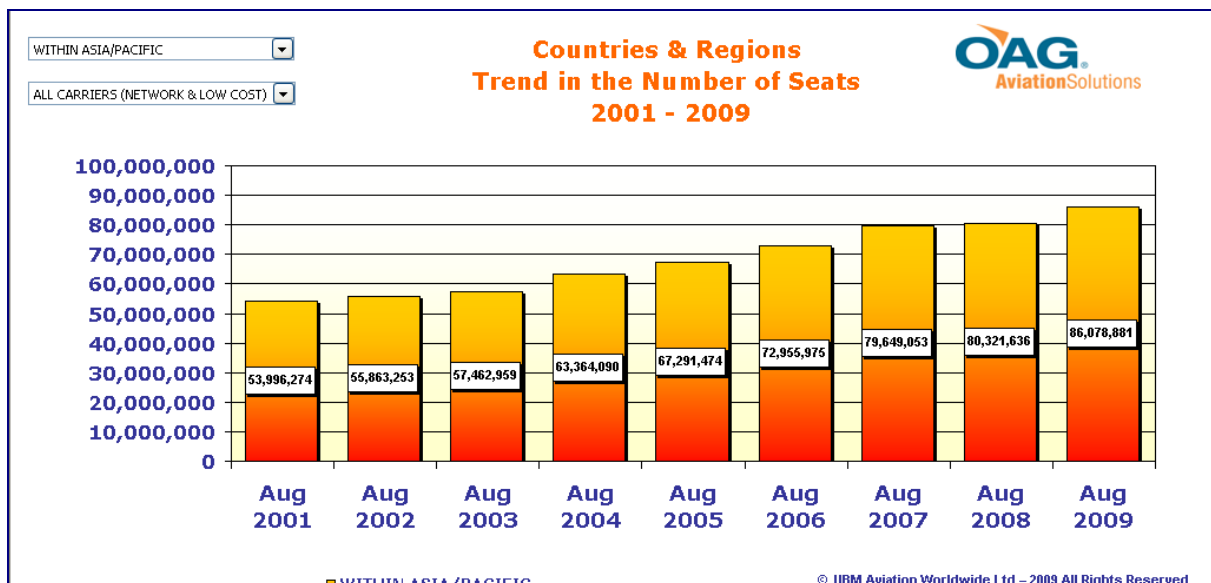
Flight volumes and seat capacity within **North America** are showing a 6% decline (57,354 fewer flights and 5.02 million fewer seats), while international frequencies and capacity to and from the region also have dropped by 6%.

Latin America continues to experience growth in air service within the region, with a rise of 2% in frequencies (3,859 more flights) and 6% in capacity (1.15 million more seats). The low cost sector especially is seeing healthy growth of 36%. This is mainly in Brazil where Gol has continued to expand and the creation of Azul has also increased the size of the LCC sector.



Operations and capacity to and from Central and South America, however, are down by 5% year on year.

Figures for **Asia** also show a contrast between services within, and to/from the region. Intra-regionally, frequencies are up by 6% (32,003 more flights) compared with August 2008, with a rise of 7% in capacity (5.8 million more seats). For services to and from the region, there is a 2% drop in capacity on 3% fewer flights.





The **Middle East** region continues to enjoy a steady upward trend. Flights and capacity for travel to and from the region are up by 13% and 14% respectively, representing an additional 5,833 more flights and 1.3 million more seats than in August 2008, while the number of flights and seats offered within the region are up by 19% and 18% respectively.

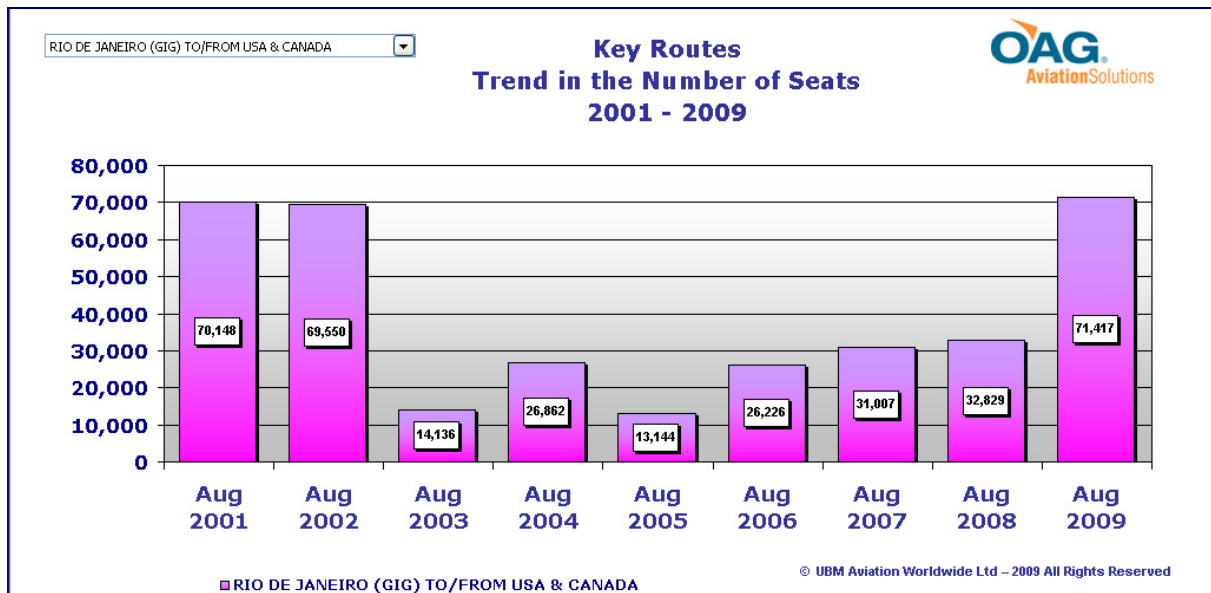
Flights to and from **Africa** are up by 10% (3,624 more flights) with a 12% rise in capacity of 809,000 more seats. Air service within the region is also showing an upturn year on year with a 2% rise in the volume of flights and 5% more seat capacity.

Analysis by Major Routes

On the key long-haul routes, the OAG figures for August show continued growth between Western Europe and the Middle East, and between Western Europe and Africa, with upturns in capacity of 15% (443,000 more seats) and 11% (469,000 more seats) respectively compared with August 2008.

The transatlantic market between North America and Western Europe shows a 6% fall in capacity year on year, representing 481,000 fewer seats. London Gatwick airport is bearing the brunt of the capacity cutbacks with 124,000 fewer seats (33% decline), followed by Los Angeles and Amsterdam Schiphol, with 91,000 and 90,000 fewer seats between the regions. Frequencies are down 8%, representing 2,407 fewer transatlantic flights.

During August there also will be 7% less capacity (520,000 fewer seats) on services between North America and Central/South America than a year ago. Mexico City and Miami are showing the largest capacity cutbacks on services between Latin America and the USA & Canada with 137,000 and 113,000 fewer seats respectively, while Rio de Janeiro is showing the largest year on year capacity increase between the regions with more than 38,600 additional seats (up by 118%) to and from North America for August 2009.



Airlines operating transpacific routes are scheduled to offer 274,000 fewer seats this month than a year ago, a drop of 8%. San Francisco has 84,000 fewer seats (-16%) on offer to and from Asia Pacific than a year ago, while Hong Kong and Tokyo airports are showing downturns of 62,000 (-16%) and 60,000 (-6%) seats to and from North America.

OAG FACTS enables you to see trends at-a-glance. An easy to use tool providing the latest data on current airline activity around the world. Updated monthly, it uses interactive graphs to display a visual trend of the performance of a specific airport, route, country or region from 2001 - 2009.

If you need customized analysis, or have a question for our analytical team, please contact your local office below.

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