

Network Characteristics of the World's “Best” LCCs Compared

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Editor

anna.aero

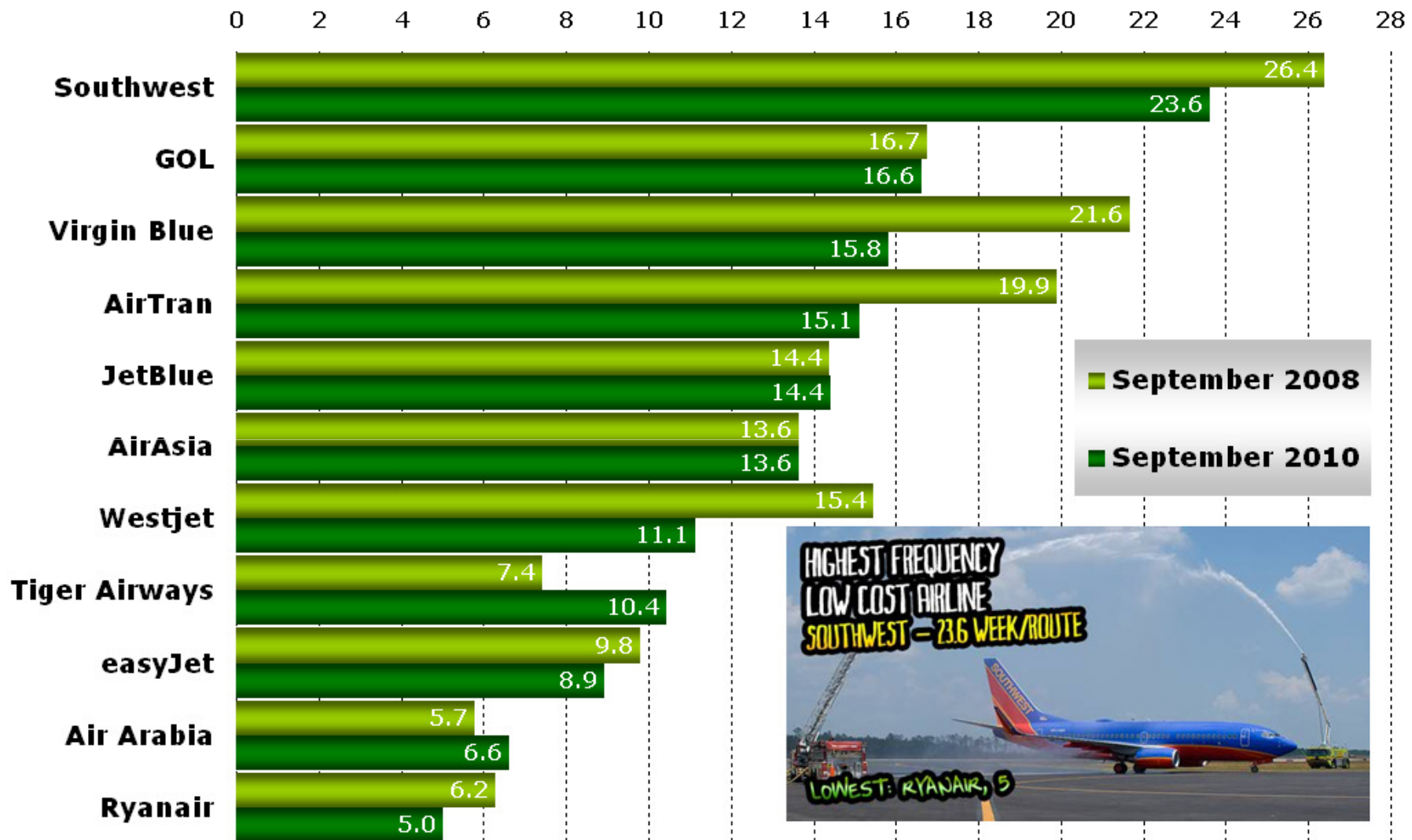
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Overview of presentation

- How different are the network strategies of the world's "best" LCCs?
- Taking a closer look at:
 - **Asia:** AirAsia, Tiger Airways, Virgin Blue
 - **Europe:** easyJet & Ryanair
 - **Middle East:** Air Arabia
 - **North America:** AirTran, JetBlue, Southwest, WestJet
 - **South America:** GOL
- European LCC network trends
- What are the network challenges?
- Future issues

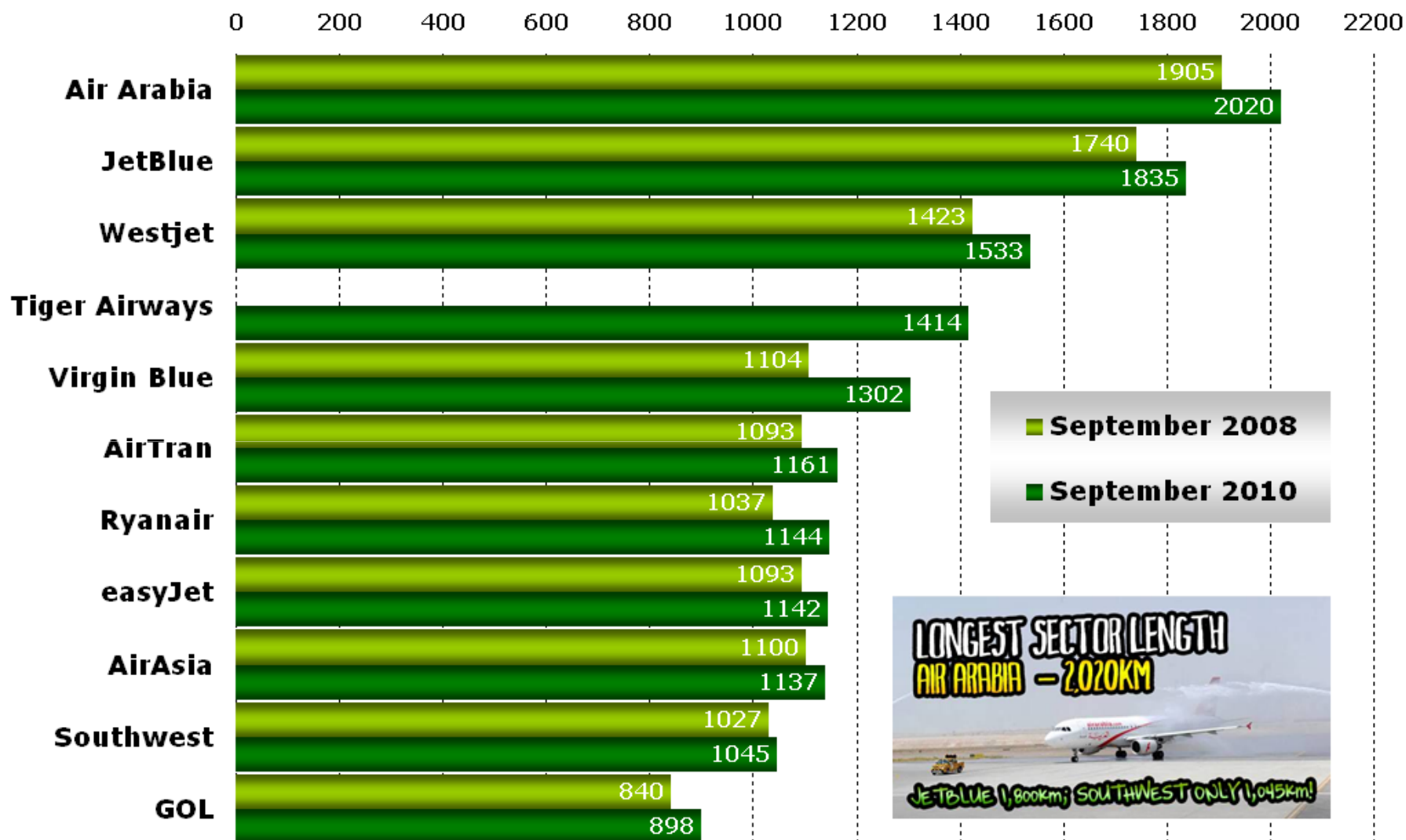
Average weekly frequency per route



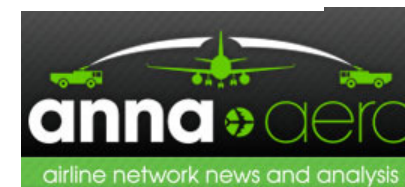
Source: OAG Max Online



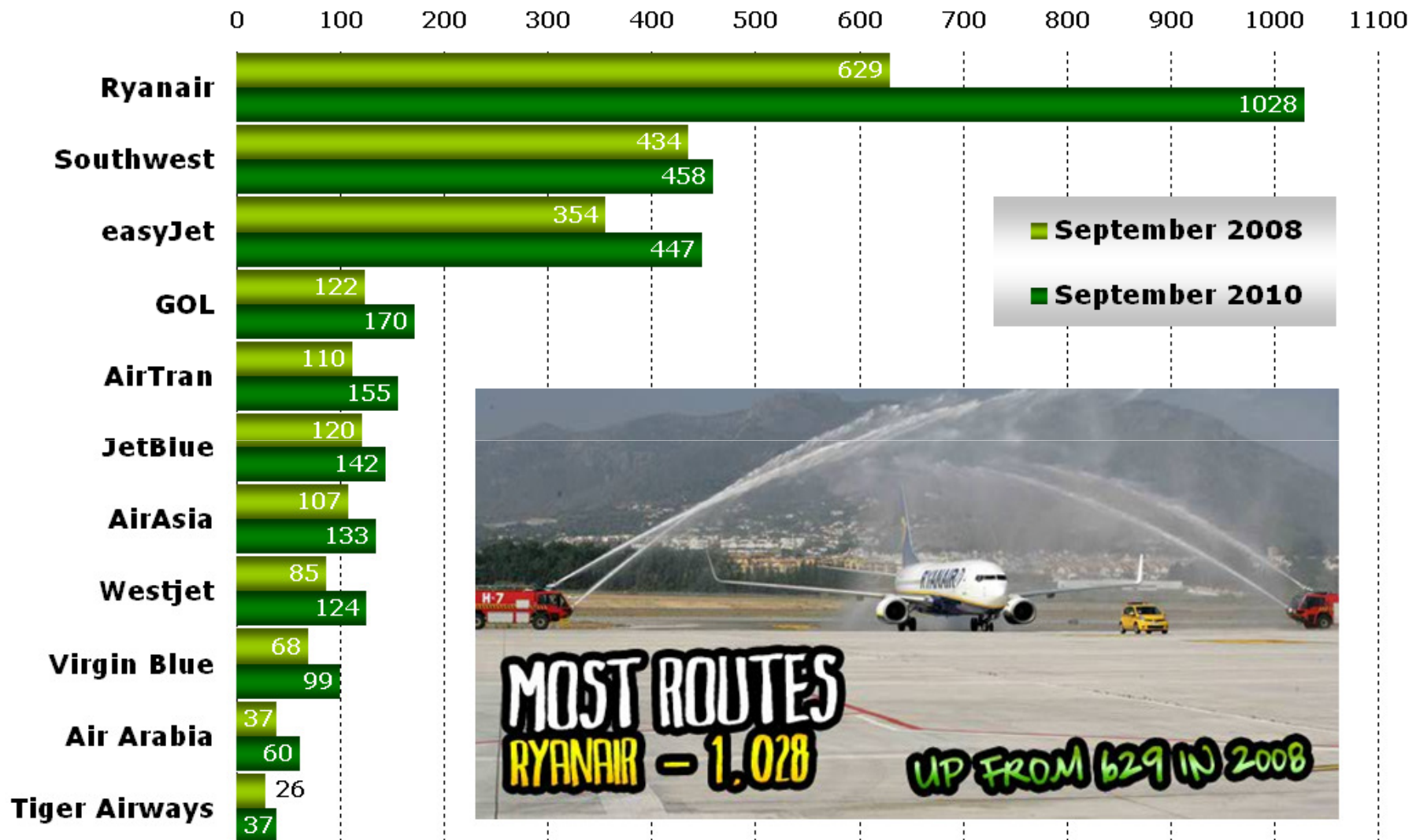
Average sector length (km)



Source: OAG Max Online

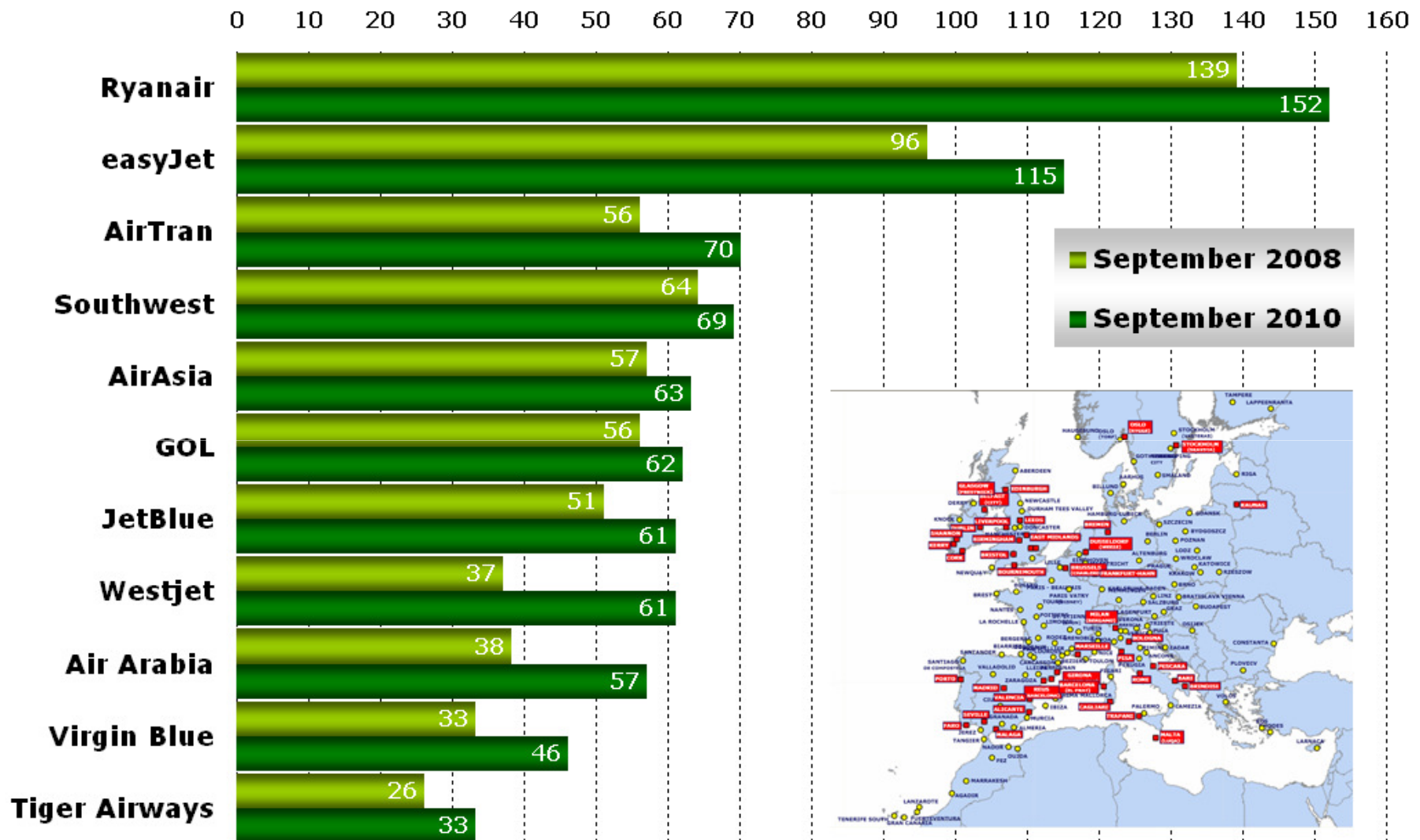


Point-to-point routes



Source: OAG Max Online

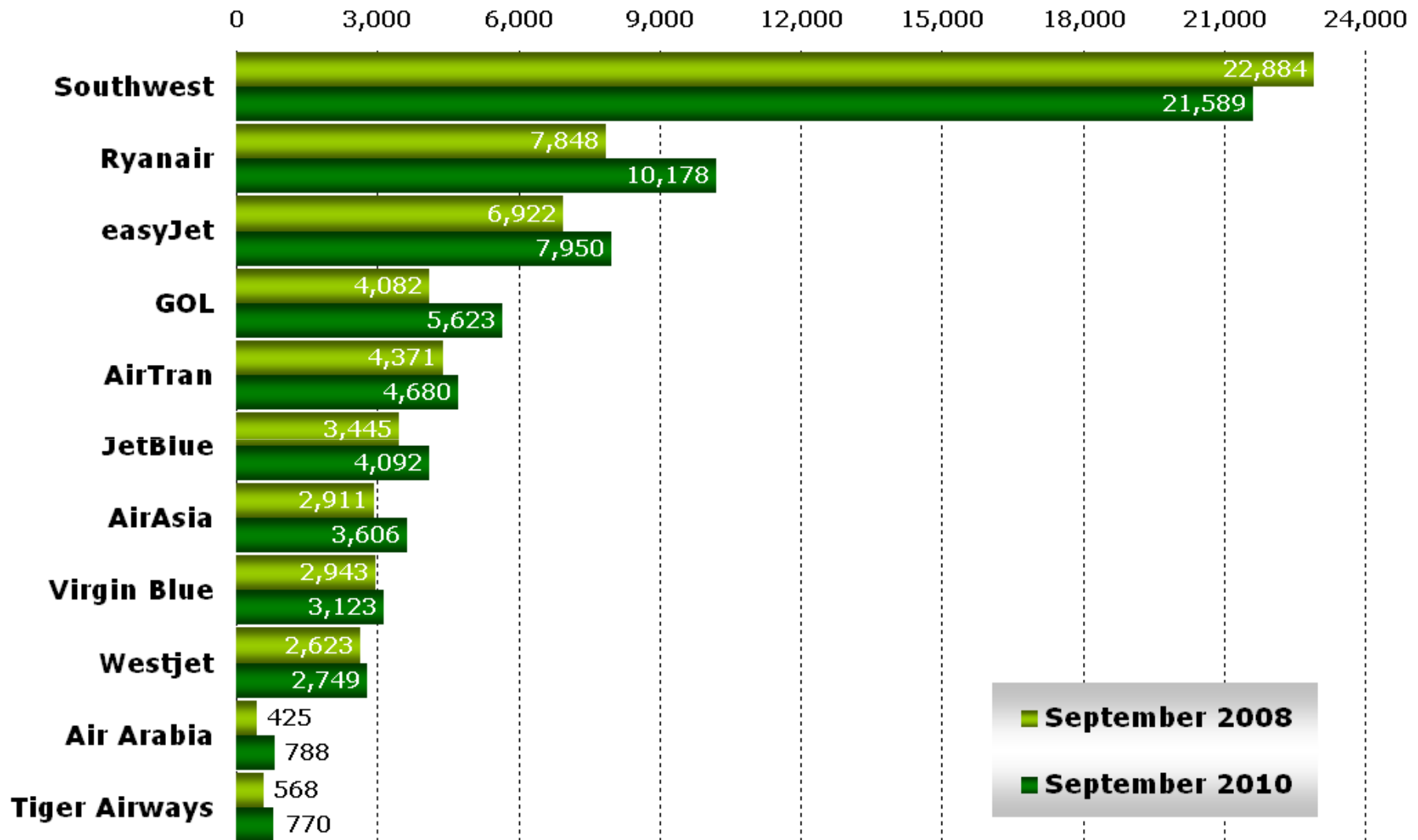
Airports served



Source: OAG Max Online



Weekly departures

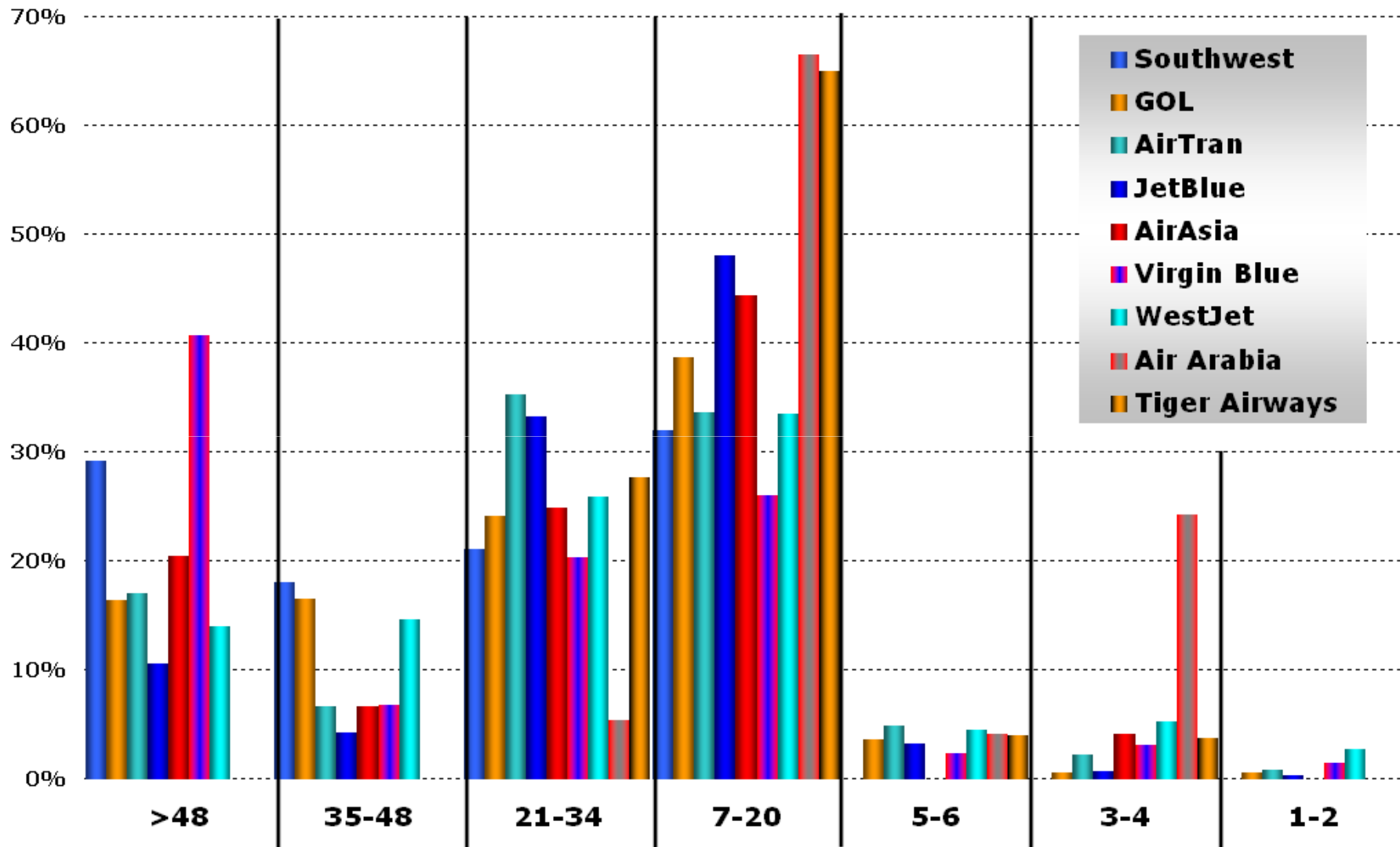


Source: OAG Max Online



Non-European LCCs network comparison

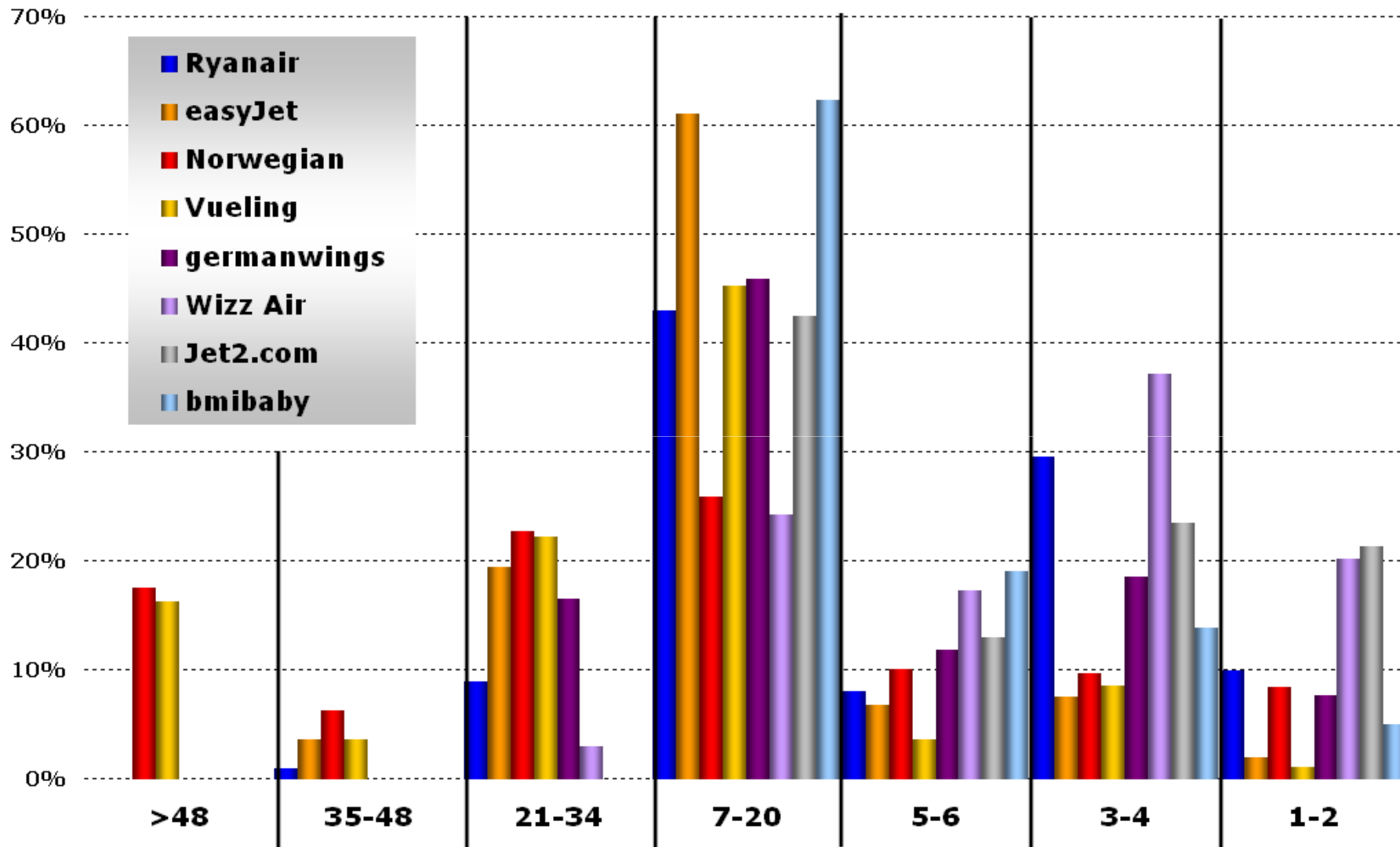
Share of flights operated by weekly route frequency



Source: OAG Max Online

Euro LCCs network comparison

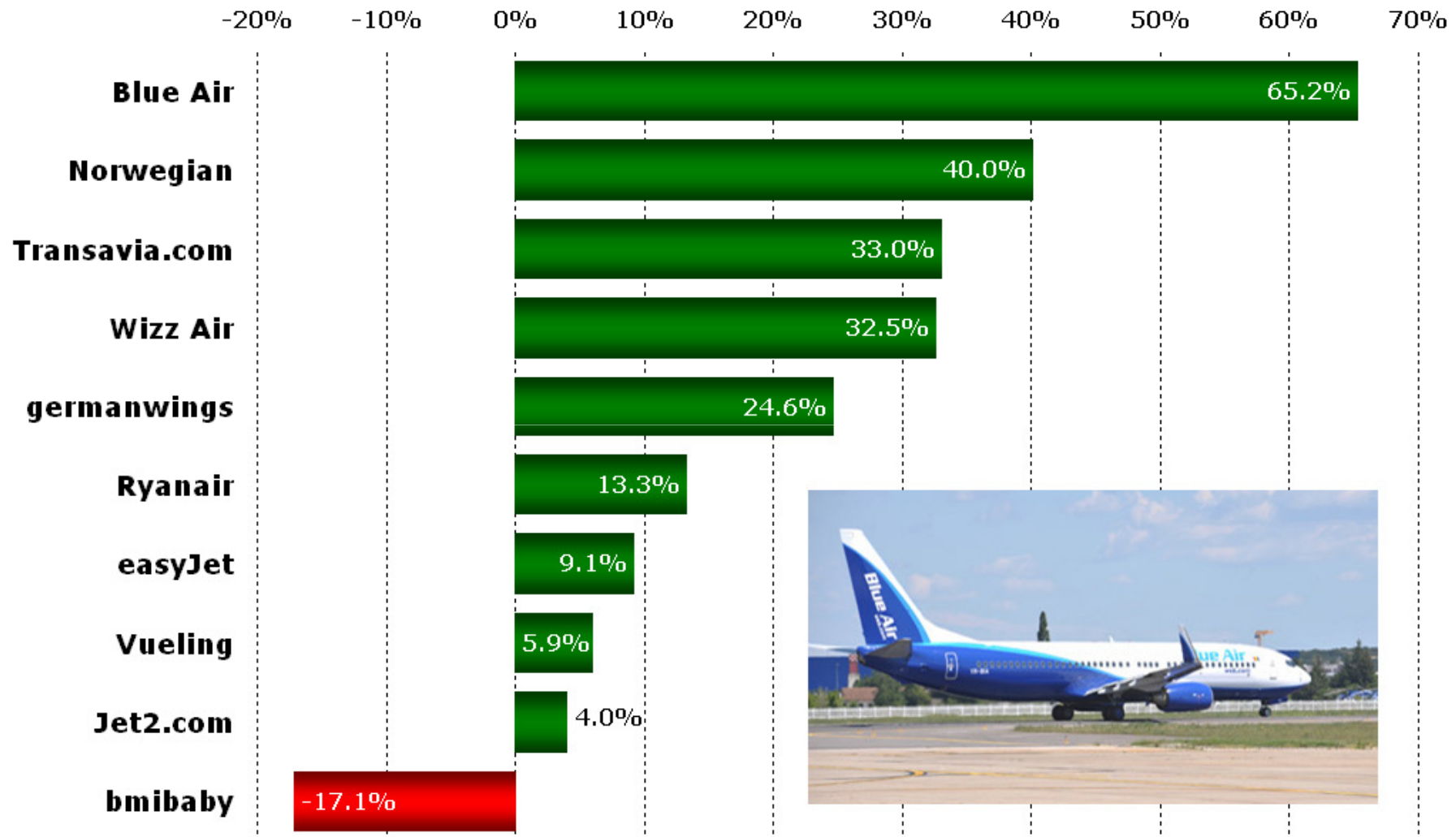
Share of flights operated by weekly route frequency



Source: OAG Max Online

European LCCs still growing

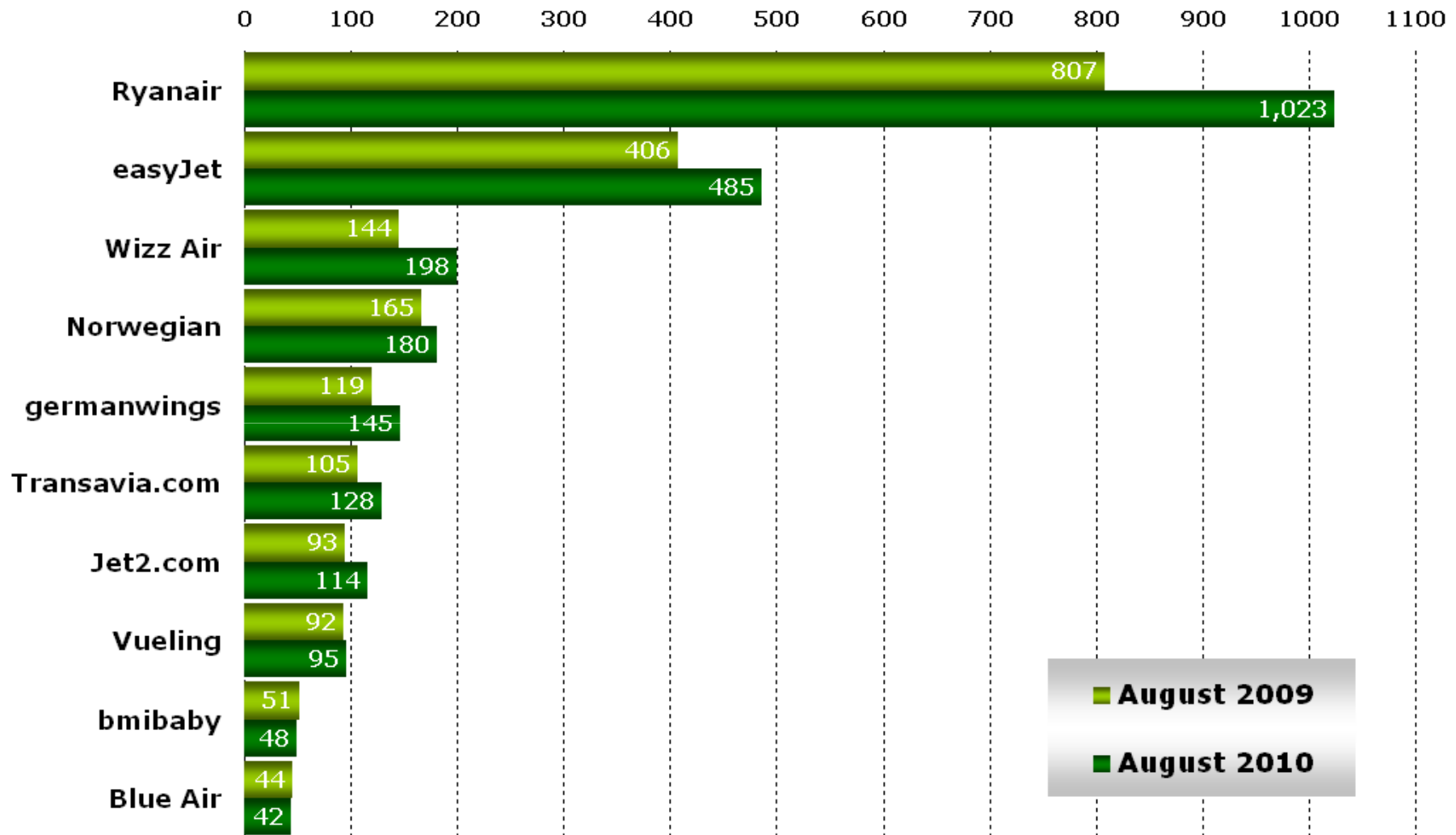
Change in seat capacity August 2010 v August 2009



Source: OAG Max Online

European LCCs

Number of routes operated August 2010 v August 2009

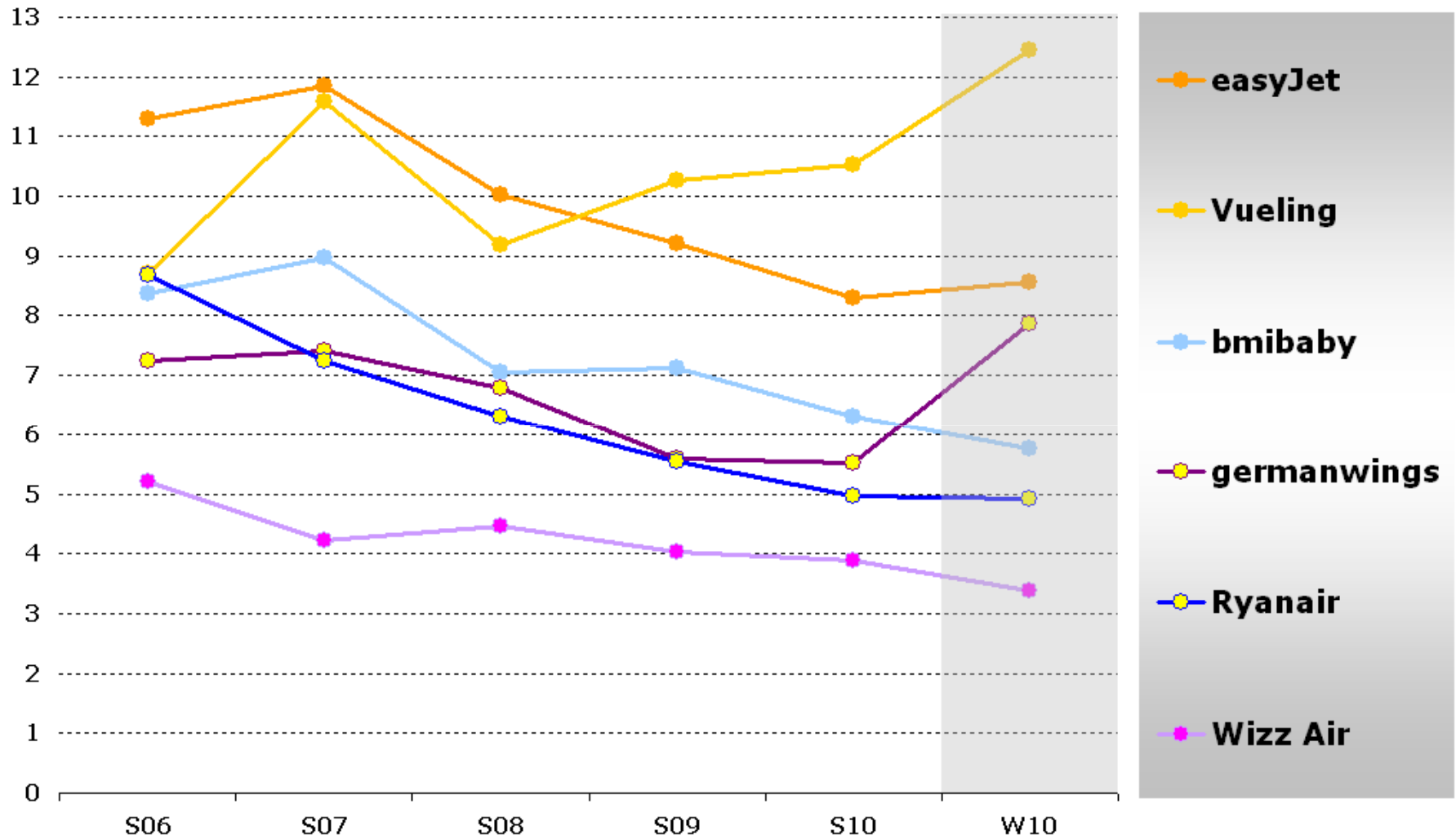


Source: OAG Max Online



European LCCs

Average route frequency in summer (2006-2010) + W10

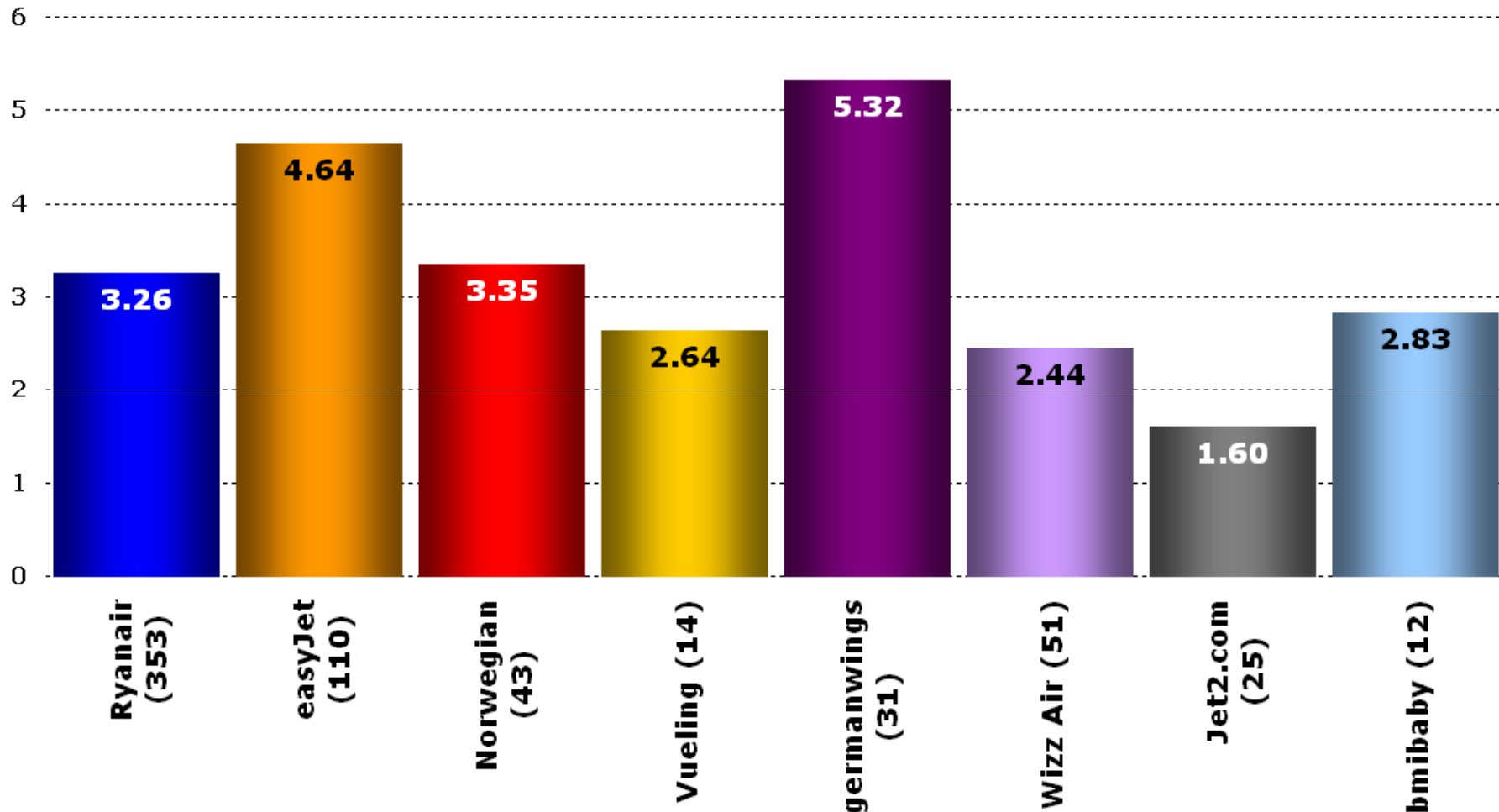


Source: OAG Max Online



Euro LCCs network comparison

Average weekly frequency of new routes started in last 12 months (and number of routes started)



Source: anna.aero new route database



Issues for the future

- Consolidation and partnerships:
 - Southwest acquires AirTran
 - germanwings getting closer to Lufthansa
 - Vueling's links with Iberia
- Diversification
 - Air Arabia's regional subsidiaries (Jordan next)
 - Wizz Air bases in 12 countries (Serbia next)
 - Gol's acquisition of Varig
 - Southwest considering bigger 737-800s (plus AirTran's 717s)
- Reaching a limit?
 - Ryanair contemplating using bigger airports (already has a big base at Madrid, and new one at Barcelona El Prat)
 - But not Frankfurt, Heathrow or Paris CDG!
- Plus taxation, ancillary revenues etc.

Thank you!

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If your competitors are reading it (and they are!) shouldn't you see what they know that you don't?





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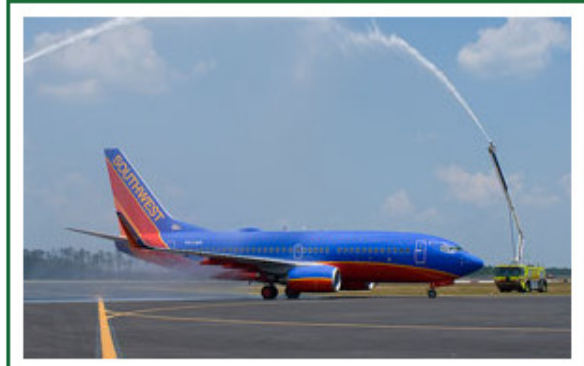
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Country Feature	124 ON FILE
Farewatch	47 ON FILE
Market Trends	284

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