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The art of networking – Welcome Drinks Reception

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THE AIRLINE TEAM!

Comparing who is the most jet-lagged are: Robyn Platt, Air Service Programme Manager, San Diego Airport; Kazue Ishiwata, Senior Manager, Air Service Development, Seattle-Tacoma Airport; Carol Hewitt, Director, Route Development, Edmonton Airport; and Ronnie Pickard, Director of Strategic Customer Relations & Special Projects, Houston Airports.

Enjoying the reception drinks are: Lissa Curtin, Manager, Air Service & Business Development, Orlando Airport; Sallyanne Collins, Event Director, AIRLINE; Molly Waits, Director of Air Service Development, Houston Airports; and Laura Jackson, VP, Air Service Development, Denver Airport.
Delegates have come from far and wide to attend AIRLINE, including: Akram Nizar, GM Commercial & Marketing, Maldives Airports; Hussain Sharif, Manager Airline Strategy & Key Accounts, Maldives Airports; Oksana Mottershead, Sales Director, AIRLINE; and Eric Layden, VP, GTI.

Surveying the Germany/Italy market are: Ivan Orec, Senior Manager Network Development & Airport Relations, Eurowings; Anna Milanese, GM, Cuneo Airport; and Giacomo Cattaneo, Director of Commercial Aviation, Milan Bergamo Airport.

Discussing their new route development roles are: Peter Downes, Aviation Director, London City Airport; William Pearson, CCO, Regional & City Airports; and Mark Povall, Business Development Director, Etllean Consulting.

Catching up with old acquaintances are: Dan Irvine, Aviation Development Manager, Shannon Airport; Chris Haynes, Business Development Manager, RDC; and Stephen O’Reilly, Airline Business Development Manager, Dublin Airport.

Admiring the view of the London cityscape are: Yil Surehan, VP, Airline Business Development, Washington Dulles Airport (hosts of the Welcome Drinks Reception); Matt Cornelius, EVP, ACI – North America; and Howard Mann, VP, Campbell-Hill Aviation Group.
ORLANDO HERE

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Land on Opportunity.
Exploring route opportunities between Spain and the Austrian capital are: Daniel Johan Reus, Network Development Manager, Vueling; Carolin Drott, Senior Manager Europe, Vienna Airport; and Gabriel Schmilovich Isgut, Director Network Strategy, Development and Planning, Vueling.

Discussing new routes in the Great Lakes region are: Pat Rowe, Director Air Service Development, Milwaukee Airport; and Todd Payne, Chief, Marketing & Air Service Development, Cleveland Airport System.
Washington Dulles International Airport (IAD) is Washington, D.C.’s gateway to the world, offering 141 non-stop international and domestic destinations served by 39 airlines.

24.1 Million Passengers chose IAD in 2018, following 4 years of total passenger growth, and 15 years of growth in international passengers.

The Washington, D.C. Metropolitan Area boasts one of the largest and strongest economies in the United States - ranked #1 in median household income, #5 in GDP at $530 Billion, and #6 in population. The region is home to global businesses, government, non-profit and research institutions that drive corporate travel and the 2nd highest premium passenger share in the country.

Airlines at IAD benefit from 24-hour operations, no slot restrictions, a large, unconstrained facility, and a 37% reduction in Average Cost per Enplaned Passenger (CPE) since 2013. Passengers enjoy access to the city center and surrounding area via both public transportation and toll-free dedicated highway.

When flying to the Nation’s Capital, Fly IAD.
NEWS FROM THE MEETING HALLS...

Nuremberg’s network gaps filled

By the start of W19/20, much of the capacity lost at Nuremberg Airport following the demise of Germania will have been recouped – the LCC commanded 12% of passengers at the gateway in 2018 and were expected to contribute 11% in 2019. “Following the announcement that Corendon Europe Airlines will base a 737-800 this winter, we have recovered three of the four based units the airport lost in February,” confides Christian Kaeser, Head of Aviation Development & Marketing for the German airport. Along with Corendon, both Eurowings and TUIfly will add single units at Nuremberg this year. “It didn’t take us long to regain some of our ‘bread and butter’ leisure services, but Germania operated 28 year-round routes from here before its collapse, and they were a real ‘Blue Ocean’ carrier for us, developing attractive destinations like Athens and Tel Aviv, alongside its traditional leisure routes.”

COPENHAGEN CONNECTION

Some of the remaining network gaps developed by Germania, like Athens and Tel Aviv, have been filled by Ryanair from W19/20. Complementing this expansion, the Irish ULCC will also add a twice-weekly operation to Copenhagen this winter, while its Naples service, which starts next week, will continue year-round. Wizz Air starts its fourth Romanian destination to Timisoara on 2 September, while Turkish Airlines increases its Istanbul Atatürk route to four times daily this summer.

“We are here this week to build on previous success and expand our reach into Europe,” explains Todd Payne, Chief, Marketing & Development at Cleveland Airport System. “We have grown from 300 indirect European passengers per day to over 700 during S18, and we think a service to a hub such as London, Rome, Dublin, Frankfurt or Paris would capture many of these.”

Cleveland’s eastward evolution

Payne’s proposition to the airlines is a strong one. The Ohio city has an impressive manufacturing core with the traditional steel-based and the automotive sectors still prominent. Recently a wide range of new technology businesses have become established, and the city is world renowned for its medical research. The Cleveland Clinic is ranked #1 in cardiology nationwide.

10M PASSENGERS

While significant traffic was lost when the United Airlines’ hub closed in 2014, the airport has recovered much of this traffic recently and is expected to climb above 10 million passengers for the first time since the financial crash of 2007/8 by the end of 2019. “We have had several new airlines become firmly established at Cleveland,” notes Todd. “Frontier opened a focus city with 20 markets, and this was soon followed by growth from Spirit, JetBlue and Allegiant. Even United has added services recently, as have Delta and Southwest.”
Spectacular growth at Bordeaux

It is Catherine Caraglio’s first visit to AIRLINE Total Networking, but the airport’s Head of Route Development has quite a story to tell her airline counterparts. “In the last ten years, the airport’s passenger numbers have more than doubled to over seven million,” says Caraglio. “In fact, the forecast for 2019 is actually 7.4m and we are confident we might do even better than that.”

The year has got off to a spectacular start with an incredible 40 routes launched since the new year. A number of LCCs have established bases at the airport including Ryanair, easyJet and Volotea. Together these three carriers will operate 100 new routes by S19. In the full-service world, Finnair have recently started flying to Helsinki, Ural Airways to Moscow Domodedovo and Air Canada to Montreal.

TWO-WAY TRAFFIC

Caraglio says that a combination of factors is driving the growth. “We are finding that many of our leisure routes are strong in both directions. Even our Paris routes have grown despite the launch of high-speed train services between the two cities in 2017. Bordeaux’s new position as the capital of a vastly expanded south-west region in France has undoubtedly helped in this respect.”

Looking forward, Caraglio has her sights set further afield. “We are keen to develop transatlantic routes, especially to the US Eastern Seaboard. But equally we are committed to looking after our existing carriers and exploring further new route opportunities with them.”

Flair fuels Edmonton resurgence

Edmonton Airport experienced its best-ever year in 2018, as traffic reached 8.3 million passengers and delivered 5.8% annual growth. “The move of Flair’s headquarters to the city, along with the arrival of Swoop, helped to fuel this growth,” explains Carol Hewitt, Director Route Development at Canada’s fifth busiest airport. The ULCC offers services to Las Vegas as well as six domestic points. “In the space of a year, the share that ULCC’s have of the Edmonton market has gone from zero to 16%,” states Hewitt. Flair is keen to not stop there and is looking at potentially more transborder routes with high leisure content as befits its traffic profile. Discussions with other airlines have been kick-started by the recent market stimulation. “Other Canadian carriers have re-engaged with us since the Flair decision,” adds Hewitt.

SALES USP

One thing that Hewitt is rightly proud of, is the fact that Edmonton has inbound and outbound airline sales representatives promoting the airport’s services. “We think this approach is pretty unique in Canada,” suggests Hewitt. Talking with travel trade partners and important corporates at each end of the route, this approach of helping its airline fill seats has been widely acknowledged as industry leading by Edmonton’s incumbent carriers.
Why we don’t produce full-service carrier average fare data

The reason we don’t do it is because it’s trickier than trying to put socks on a badger! Andrew Myers, Economics Director Aviation Analytics explains why we take this approach.

It is ten years since Aviation Analytics (AA) launched its unique low-cost carrier (LCC) network performance tool, Network Grandstand, which we still believe to be the most accurate on the market.

The reasons for this are that we have the most experience of anyone in this field of analysing airline accounts data, we collect the largest number of fare data points (10 observations over a six-month period), but perhaps most importantly, AA only estimates average fares and profitability for LCCs. By means of a worked example, we will explain how the complexity of the long-haul model can lead to cumulative errors which render the result invalid.

The LCC model, through its simplicity, has lent itself reasonably well to a certain level of ease in predicting whether a route is profitable or not. Even here though, any numbers that are presented are still subject to a margin of error.

TAKE CARE WITH AIRPORT CHARGES

The average fare is dependent on predicting the booking curve up to the point of departure, where it is essential to take as many sample points as possible (at least eight to 10). Then the ancillary revenue needs to be predicted. This will vary by type of route and season. Finally, care must be taken with the operating costs to ensure that the airport charges are close to what the airline is actually paying rather than the published charges.

Thankfully load factors and aircraft types are pretty stable and the overall simplicity of the model means that if the complete network data set is observed, the end result can be calibrated to the airline’s accounts to give a reasonably accurate route by route picture. Even then, we would be reluctant to say that an actual figure is completely accurate, so here at AA we colour code the routes by profit margin instead, with green routes being the ones we think are making money, yellow breaking even and orange/red losing money.

We believe that taking the colour coding as the basis, the overall picture of a network, or airport base health can be established. Indeed, in a recent season, 88% of easyjet routes that were cancelled were either orange or red. Network Grandstand allows the user to group by airport, city and country to provide benchmarking analysis for both existing and new routes.

FOUR CABINS = FARE COMPLEXITY

Calculating average fares for full-service carriers (FSCs), and especially long-haul, is a completely different matter. Firstly, there can be up to four cabins on long-haul equipment, with various load factors in each and differently configured aircraft on the same route. Next, connecting traffic has to be factored in, which will be carried at a far lower sector yield than point-to-point traffic. Not only do we have to try and estimate how much connecting traffic there is, which might vary considerably by route, but also how much the respective sectors are discounted by and allocated within the overall fare. For example, a London Heathrow (LHR) to Bangkok Suvarnabhumi (BKK) fare might be £500, while a LHR to Sydney (via BKK) fare might be £750, meaning that the LHR-BKK component might only be £375 (assuming an equal split).

Another assumption which has to be decided upon is that we need to consider corporate deal traffic, which will be carried at different proportions in...
“Having an error of just 5% on each revenue variable can change a route from having an average profit per seat sold of just under £20 to one at £25 loss and a margin of -13%,” says Aviation Analytics Economics Director Andy Myers.

Each cabin and at different discounts to the fare. Then, there is likely to be some non-revenue traffic (staff passengers and crew) which also needs to be factored in, and finally an allowance needs to be made for cargo.

**SMALL ERRORS ADD UP**

Because of the wide range of aircraft types and configurations it is impossible to accurately calibrate the model to airline accounts, especially when the airline also flies short- and medium-haul routes. This makes the accuracy of the individual study all the more important. With almost all the factors above it is very difficult to make accurate assumptions, but how much impact would a small error in each have on the overall result?

AA decided to have a look using an example of an seven-hour (or so) sector from LHR to New York JFK on a network carrier’s 787-9 fleet. Our model was set up with a base-case scenario, with some sample costs (around £50,000 per sector) and average fares by cabin, while assumptions were adjusted to give a profit margin of 8% on each seat sold.

The base assumptions were:
- Fares of £1,000, £350 and £150 for business, premium and economy seats respectively;
- Load factor of 85% in each cabin;
- 30% connecting traffic carried at 65% of the point-to-point fare;
- 20% corporate traffic at a discount of 30%;
- 5% non-revenue traffic (staff, FFP, upgrades etc.) carried at a discount of 75%;
- 10% cargo revenue.

This gave an average profit per seat sold of just under £20 based on 787-9 operating costs of £50,000 per sector. Then we set up a scenario where each assumption was five percentage points out in an unfavourable direction. We subtracted 5% from all fares, increased the economy load factor to 87% while adjusting the other cabins down to maintain an 85% average. Connecting traffic was increased by five percentage points, whilst yield was reduced by 5%. The same five percentage point changes were applied to the other factors. The resultant profit per seat sold reduced from £20 to a LOSS of £25 and a margin of -13%.

**INVALID MODELLING**

While it is possible that not all errors will align in the same direction, meaning that, for example an underestimate on connecting traffic could be cancelled out by an overestimate on corporate traffic, an overall error of 5-6% is almost certainly possible (individual errors could easily be up to 15-20%). On routes such as the one above, the overall average fare can easily be 20% out, invalidating the entire forecasting model.

AA is able to provide good value fare data on any route (direct and indirect), and the trends and relativity in these fares can certainly be used as a good indicator of overall market conditions. On an individual route, it is possible (with a lot of research), to get an idea of average fare and profitability, but to try and accurately work out individual route profitability on a network scale with so many assumptions is simply not possible.

Any company without a GDS-based system that is claiming otherwise, is simply not being honest with its customers in our opinion. That’s why we stick to looking at LCC fare data...as the results are far more robust!! Come and talk to me on our stand to find out more.
When it was launched in September 2015, London Gatwick’s world-leading product GatwickConnects enabled connecting flights between low-cost and full-service carriers to be booked in a single transaction. The London airport, Europe’s eighth busiest, is uniquely placed to innovate such a product due to its diverse range of short- and long-haul carriers. 45 airlines currently serve Gatwick, of which 14, including its three biggest partners – easyJet, British Airways and Norwegian – are currently signed up to the concept.

Since its inception, GatwickConnects has helped reduce the need for complex multi-sector itineraries. “For example, Norwegian’s passengers arriving into Gatwick at 0630 from Denver on a Saturday can connect onto easyJet’s service to Rome at 0910. This one-stop connection is not available at any other airport not only in Europe, but in the world!” enthuses Stephen King, Head of Airline Relations at the UK hub. “There are countless single flight transfers like this where Gatwick is the only global gateway this can happen.” Cathay Pacific Airways went live on the service in January, offering connections on to the oneworld carrier’s flights to Hong Kong.

The airport’s innovative approach, of which GatwickConnects is a clear example, was recently praised by none other than Alex Cruz, British Airways CEO (Source: FlightGlobal, 20 February 2019). “This is an airport that has been at the forefront of heavy, intense difficult competition for many years now. As a consequence, Gatwick is the airport that has changed and evolved the fastest.”

AMERICAS FOCUS

While attending AIRLINE this week, King is keen to make some progress on securing additional capacity to the Americas. “While we have services to 15 US, 11 Caribbean, seven Canadian and seven Central and South American destinations during 2019, we still have some unserved and underserved prospects we would like filling.” Part of Gatwick’s route portfolio to this region are Miami, Rio de Janeiro and San Francisco, which are being launched next week by Norwegian, now firmly the airport’s largest seat supplier to the US.

BIGGER THAN STANSTED AND LUTON COMBINED

Adding long-haul routes like these has meant that Gatwick’s share of London’s ASKs has grown faster than any other major airport in the UK capital over the last five years. “Between S14 and S19 our share of ASKs has increased by 1.7%, ahead of Stansted [+1.6%], Luton [+1.2%] and City [+0.02%], while Heathrow’s share has fallen by 5.6%,” explains King. Over the same period, Gatwick’s peak week capacity has risen by over 80,000 to close to 600,000 seats. “To give you an idea of our scale, Gatwick’s weekly capacity is bigger than both Stansted and Luton combined,” concludes King.
Everyone knows that Orlando is a tourism hotspot – it attracted 72 million visitors in 2017, making it the #1 family destination in the world – but long before the Floridian city became the theme park capital of the world, technology, but more specifically aerospace and defence, was a key industry in supporting America’s space race. “Simulation-based technology has been a vital ingredient to Orlando’s economy since it was developed to take man to the moon,” enthuses Victoria Jaramillo, Senior Director, Air Service & Business Development at Orlando International (MCO). “Many companies are expanding, relocating and growing in Orlando/Central Florida. These include KPMG, Johnson & Johnson, Deloitte, ADP and Lockheed Martin adding over 5,000 new jobs in total.”

At the centre of the ‘two Orlando cities’ is MCO, the busiest airport in Florida with over 48 million annual passengers. “Florida’s largest catchment area of 12.5 million people is within two hours of MCO. And to keep up with passenger growth, a new South Terminal is expected to come online in 2021,” comments Jaramillo. MCO had phenomenal air service development growth in 2018. The airport added seven new airlines and 29 new routes, resulting in over 365,000 additional annual seats.

**MCO LOVES LONDON**

When it comes to Jaramillo’s to-do list while attending AIRLINE this week, she is clear on her primary objective. “London Heathrow is absolutely at the top of the list. Not only is Heathrow MCO’s largest unserved market, it is the largest unserved US to Europe route.” Despite there being almost 1,400 daily non-stop seats between London Gatwick and MCO, there are still over 300 Heathrow-Orlando pdews. “Other routes of interest include Tokyo, Buenos Aires and China,” adds Jaramillo.

**BEYOND THE LAUNCH**

The airport has been improving its market data to provide a more compelling business case to prospective airlines. “We have just completed an updated catchment/leakage study that we will be sharing with the airlines,” confirms Lissa Curtin, MCO’s Manager, Air Service & Business Development. Knowing a thing or two about launches (MCO is the closest airport to Cape Canaveral), Curtin appreciates that once a route is secured that the airport’s job is far from over. “MCO does not just recruit its airlines, but we work with them to build their marketing plans and identify opportunities to get their brand and route known in the local market.”

**AWARDS AVALANCHE**

All of these endeavours have been recognised by the receipt of industry accolades. “We have been crowned #1 for passenger satisfaction by JD Power for two years in a row. MCO was also the CAPA ‘Large Airport of the Year’ in 2018, and we were on the Routes America’s Marketing Award short list,” concludes Curtin.
“We are about to do a sales blitz of the US,” states Tom Screen, Aviation Director at Birmingham Airport. “We will be putting a deal in front of every carrier to operate a daily New York service.” The UK’s seventh busiest airport lost daily connection to New York when United Airlines withdrew its Newark route in October 2017, at the same time, in an adjustment of its UK and Irish services, the Star Alliance carrier converted its year-round Glasgow and Shannon services to seasonal. “The fact that we don’t have a US hub service at the moment doesn’t mean that there isn’t a huge potential market there for the first carrier that wants to seize the opportunity,” adds Screen. “We are probably the biggest market without a direct US service in Europe at the moment.”

**TAKE A BITE OF BIG APPLE DATA**

The demand to New York from Birmingham’s one-hour catchment is robust, with close to 300,000 annual two-way journeys. “When we had direct flights, we picked up 95,000 of this market,” says Screen. Other US points are equally strong in terms of potential demand – the Orlando market has nearly 190,000 two-way journeys per year, while Las Vegas and Los Angeles are both over 80,000. “San Francisco, Boston and Chicago are all around 50,000 per year – and most of this is surface leakage to other airports,” suggests Screen.

Looking across the border into Canada, Toronto is an underserved opportunity generating around 100,000 two-way annual journeys. “Given its potential market size, gaining more capacity to Toronto is a priority for us, as we currently only pick up 25% of actual passenger flows,” offers Screen.

Key to unlocking the prospective demand to the US will be accessing the significant high-yielding corporate connections between the two markets. “Many people know us for being the manufacturing heart of the UK and home to the likes of Jaguar Land Rover, JCB and Rolls-Royce, but we are also the HQ for tech organisations like the 40 gaming companies in ‘Silicon Spa’ – or Leamington Spa as it is also known,” says Screen. Other major transatlantic traffic generators come from a variety of sectors including UTC Aerospace, Cadbury/Kraft and Gymshark.

**STEADY SHARE**

Despite being a mature market, the UK’s peak week seat capacity has grown by nearly 20% between S13 and S18 seasons. During this period of significant growth, Birmingham has maintained its share of UK capacity (up marginally from 4.36% to 4.41%), whereas other regional airports like East Midlands, Newcastle and Liverpool, as well as London Heathrow, have all witnessed share declines.
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We prepare for conferences such as AIRLINE 2019 with thorough data-driven research to build robust business cases for those airlines we meet with. Internal Chyun, Airline Business Development Director at Metropolitan Washington Airports Authority (MWAA), which operates both Dulles and Reagan airports. "Like any experienced business traveller, we plan our trips carefully and make certain we are prepared for contingencies like weather or travel delays. An extra power converter in your carry-on like London makes preparing easy to do since you can find anything you might have forgotten without any problems."

Major Economic Centre

During this week's event, Chyun has a clear idea on what MWAA’s objectives are. "We are always looking at opportunities for growth worldwide where our airline partners can be successful, while expanding access to our community. And what a community. Washington D.C. is world-renowned as the seat of the US government, but it is so much more than that. The metropolitan area is an economic powerhouse, home to global companies, non-profits and research institutions. This is a large and productive region. We have the largest metropolitan population in the nation - encompassing some of the fastest growing counties in the US - and the 5th GDP at $530 billion," adds Chyun. More than 70 companies with annual revenues over $1 billion - including household names like Marriott, Hilton, Airbus and Nestle - house their global or North America headquarters in the catchment. "Our world-class museums, monuments, and Michelin-rated restaurant scene cater to a wide variety of audiences," suggests Chyun.

Capital Strength

The economic strength of the region and large population make the city an outstanding business destination. A high degree of business traffic gives Dulles the second highest premium passenger share in the nation, enmeshes the city with annual revenues over $1 billion - including household names like Marriott, Hilton, Airbus and Nestle - house their global or North America headquarters in the catchment. "Our world-class museums, monuments, and Michelin-rated restaurant scene cater to a wide variety of audiences," suggests Chyun.

ZIP Downtown

Like most airport operators, MWAA is constantly improving its infrastructure to ease access and smooth its processes" To that end, the extension of the Metrorail Silver Line to Dulles is underway and is progressing towards scheduled completion in 2020. "In fact, they have already begun running test trains on the tracks. The Silver Line is an integral part of the region’s Metrorail and public transit systems - not a separate service - and will provide an economical, single-train service to the city in 35 minutes," concludes Chyun.
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Tenerife's transatlantic task

One of Tenerife’s primary goals is to attract flights from North America. “It is one of the main reasons we attend these events,” suggests Stephanie Wear Pintado, Director of Economic and Air Service Development at Tenerife Tourism. “In the short term we would like to attract flights from New York and Toronto. There is also quite a bit of potential in various Latin American markets due to VFR traffic, cultural and economic ties.”

PREMIUM OFFER

Wear Pintado states that she would also like to secure more network carriers with business class cabins operating from major hubs. “British Airways was the first carrier outside of the Spanish airlines to offer premium seats. This has been an outstanding success. We have been working closely with BA for years on a very segmented campaign to grow that sector.” As a result of this collaboration, BA has not only grown its capacity, but it now also offers more business class seats on each flight. “After BA, Lufthansa, TAP and Brussels Airlines quickly saw the opportunity and began to operate. France is one of our biggest European markets and yet we still don’t have a carrier that offers premium seats,” concludes Wear Pintado. That said as one of Europe’s leading tourism destinations, Tenerife Tourism is always looking to improve its European connectivity, adding frequencies on existing routes and new routes.

“Tenerife is a unique year-round destination and has a very high repeat index of customers who repeatedly fly to the island for holidays. In some markets, the repeat index is 78%,” confesses Stephanie Wear Pintado, Director of Economic and Air Service Development at Tenerife Tourism.

Meet the look-a-like team

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- Quality of life ranked higher than Rome, Los Angeles, Shanghai and Dubai
- 500,000 companies within the region
- 41.8m visitors welcomed to Birmingham in 2017
- £128bn regional economy

1.3m population under 25 - the youngest population of any European city