

Consumer Report

30 April 2008

CONSUMER REPORT, 1st QUARTER 2008

The Association of European Airlines has released its members' punctuality and baggage-delivery figures for the period January-March 2008. Twenty-nine AEA member airlines have provided punctuality data, and twenty-eight contributed baggage figures.

Important note: For administrative purposes, the Consumer Report will henceforward be published **twice a year**, covering the Summer (Apr-Oct) and Winter (Nov-Mar) timetable seasons.

For the first quarter, the number of bags delayed per 1000 passengers was 15.5, almost unchanged from the 2007 figure of 15.4.

Regarding punctuality, short-haul services showed a marginal improvement, with 80.4% of flights departing within 15 minutes of schedule compared with 79.3% in the corresponding period of 2007. Long-haul punctuality deteriorated very slightly, to 68.3% of departures in 2008, from 68.7% in 2007.

Punctuality and baggage delivery are not unconnected. A transfer passenger connecting at one of Europe's network hubs, whose inbound flight is slightly delayed, can expect that every effort will be made to ensure he catches his onbound flight. As a rule, airport baggage systems do not have the same propensity for expedited transfer. AEA notes that the great majority of missing bags are traced and delivered to their owners with a minimum of delay.

The report is based upon a voluntary commitment by the members of the Association to provide consumer information according to a set of commonly defined standards. **Any similar statistics reported by airlines who are not part of the AEA Consumer Report should not, under any circumstances, be construed as representing a fair comparison with the figures presented herein. AEA cannot guarantee the accuracy of such figures and indeed has reason to believe that they may represent entirely different performance criteria.**

For further information, please contact:
David Henderson, Manager Information (+32 2) 639 89 72

Note to the Editor: The Association of European Airlines (AEA) brings together 33 European established service and scheduled network carriers. These collectively carry 346 million passengers and 6 million tonnes of cargo each year, operating 2,540 aircraft serving 605 destinations in 161 countries with 11,115 flights a day. They provide around 375,600 jobs directly, and generate a total turnover of €75 billion.

DELAYED BAGGAGE
Systemwide

| AEA Carriers | N° of Passengers Enplaned | N° of Bags Missing per 1 000 pax | rank |
|-------------------------------------|------------------------------|-------------------------------------|------|
| | <i>unit</i> | <i>ratio</i> | |
| AF - Air France | 12 939 762 | 17.5 | 23 |
| AP - Air One | 1 638 340 | 6.5 | 4 |
| AY - Finnair | 2 092 311 | 15.9 | 22 |
| AZ - Alitalia | 5 347 320 | 15.6 | 21 |
| BA - British Airways plc | 9 346 255 | 28.9 | 28 |
| BD - bmi | 1 256 284 | 22.1 | 27 |
| CY - Cyprus Airways | 324 781 | 9.2 | 9 |
| EI - Aer Lingus | | | |
| FI - Icelandair | 178 599 | 11.6 | 15 |
| IB - Iberia | 7 265 946 | 11.1 | 12 |
| JK - Spanair | 2 193 122 | 10.9 | 11 |
| JP - Adria Airways | 236 877 | 8.8 | 8 |
| JU - JAT Airways | | | |
| KL - KLM Royal Dutch Airlines | 5 308 936 | 19.0 | 25 |
| KM - Air Malta | 367 500 | 4.6 | 3 |
| LG - Luxair | 108 550 | 18.8 | 24 |
| LH - Deutsche Lufthansa AG | 13 158 662 | 15.1 | 20 |
| LO - LOT Polish Airlines | 925 863 | 10.2 | 10 |
| LX - Swiss International Airlines | 3 120 174 | 11.9 | 17 |
| MA - Malev Hungarian Airlines | 679 089 | 7.5 | 5 |
| OA - Olympic Airlines | | | |
| OK - CSA Czech Airlines | 1 117 904 | 11.3 | 13 |
| OS - Austrian | 2 340 078 | 14.0 | 19 |
| OU - Croatia Airlines | 308 381 | 8.0 | 7 |
| PS - Ukraine International Airlines | 172 203 | 12.8 | 18 |
| RO - Tarom Romanian Airlines | 233 570 | 7.9 | 6 |
| SK - SAS Scandinavian Airlines | 6 539 889 | 11.7 | 16 |
| SN - SN Brussels Airlines | 865 417 | 11.4 | 14 |
| TK - Turkish Airlines | 4 580 058 | 4.3 | 1 |
| TP - TAP Portugal | 1 997 140 | 20.6 | 26 |
| VS - Virgin Atlantic Airways | | | |
| VV - AeroSvit | 496 213 | 4.4 | 2 |
| AEA | 85 139 224 | 15.5 | |

REFER TO TIMELINE OF EVENTS AT THE END OF THIS REPORT FOR CAUSES OF DISRUPTIONS

The table includes information on missing baggage performance for AEA member airlines. It is based on voluntary submissions by AEA member airlines only.

Data refers to the airlines' entire network covering domestic, intra-European, and long-haul scheduled services and non-scheduled services.

The figures show the rate of bags reported delayed upon the passengers' arrival at their final destination per 1 000 passengers transported by each carrier. On average 85% of the delayed bags are traced and delivered to the passenger within 48 hrs. SITA's World Tracer records that just under 1 bag per 2000 passengers was never recovered in 2007.

Under existing regulations, the final carrier in a passenger's journey is bound to take a mishandled baggage report irrespective of who actually caused the error. This can lead to a distortion of the published figures, as the figures reflect the effects of different operational concepts of point-to-point and hub-and-spoke airlines, where the latter have a high proportion of passengers transferring at high density airports and/or from other carriers. SITA research reveals that 49% of baggage incidences were related to connecting passengers in 2007.

In general, each carrier at its home-base airport(s) is responsible for its own baggage handling, whereas at the out-stations, baggage handling is normally outsourced to a local third party handling agent.

The statistical figures in this report as a whole and/or for a specific airline cannot be compared to other compiled statistical reports or individual reports publicly available within the airline industry.

(*) BD - bmi data refers to mainline operations only.

AEA CONSUMER REPORT

Q1 / January - March 2008

PUNCTUALITY

Total Short/Medium Haul

Long Haul

| AEA Carriers | N° of flights performed | | % on-time arrivals | | % on-time departures | | Flight regularity | | N° of flights performed | | % on-time arrivals | | % on-time departures | | Flight regularity | |
|--|-------------------------|--|--------------------|------|----------------------|------|-------------------|------|-------------------------|--|--------------------|------|----------------------|------|-------------------|------|
| | unit | | % | rank | % | rank | % | rank | unit | | % | rank | % | rank | % | rank |
| AF - Air France | 124 416 | | 83.7 | 3 | 84.2 | 9 | 97.6 | 20 | 14 135 | | 61.9 | 12 | 66.7 | 13 | 99.6 | 8 |
| AP - Air One | 22 165 | | 77.4 | 17 | 84.7 | 8 | 98.9 | 9 | | | | | | | | |
| AY - Finnair | 19 208 | | 71.4 | 27 | 72.1 | 27 | 98.7 | 12 | 1 619 | | 62.1 | 10 | 62.0 | 16 | 98.5 | 18 |
| AZ - Alitalia | 58 596 | | 83.7 | 3 | 85.3 | 5 | 98.0 | 18 | 2 911 | | 72.1 | 7 | 80.1 | 4 | 99.5 | 9 |
| BA - British Airways plc | 51 812 | | 57.8 | 29 | 61.9 | 29 | 96.1 | 24 | 14 855 | | 56.3 | 17 | 59.5 | 18 | 98.9 | 15 |
| BD - bmi | 29 882 | | 75.4 | 21 | 79.3 | 20 | 97.7 | 19 | 523 | | 67.1 | 9 | 72.3 | 11 | 99.2 | 12 |
| CY - Cyprus Airways | 3 269 | | 74.5 | 24 | 81.0 | 14 | 99.5 | 5 | | | | | | | | |
| EI - Aer Lingus | | | | | | | | | | | | | | | | |
| FI - Icelandair | 1 605 | | 73.3 | 26 | 77.1 | 21 | 100.0 | 1 | 418 | | 80.1 | 2 | 77.8 | 6 | 100.0 | 1 |
| IB - Iberia | 82 342 | | 82.5 | 6 | 85.8 | 4 | 98.8 | 10 | 4 404 | | 62.0 | 11 | 69.7 | 12 | 99.8 | 5 |
| JK - Spanair | 22 124 | | 79.2 | 14 | 85.3 | 5 | - | | 267 | | 54.7 | 18 | 64.4 | 14 | - | |
| JP - Adria Airways | 5 197 | | 77.1 | 18 | 77.0 | 22 | 99.8 | 2 | | | | | | | | |
| JU - JAT Airways | 4 500 | | 75.8 | 20 | 79.6 | 18 | 97.5 | 22 | | | | | | | | |
| KL - KLM Royal Dutch Airlines | 42 696 | | 81.4 | 9 | 76.0 | 26 | 97.6 | 20 | 7 650 | | 75.7 | 5 | 72.4 | 10 | 99.2 | 12 |
| KM - Air Malta | 3 178 | | 66.6 | 28 | 67.9 | 28 | 99.7 | 3 | | | | | | | | |
| LG - Luxair | 2 874 | | 81.8 | 8 | 84.9 | 7 | 95.3 | 27 | | | | | | | | |
| LH - Deutsche Lufthansa AG | 148 274 | | 80.6 | 12 | 80.0 | 17 | 98.4 | 15 | 11 819 | | 74.6 | 6 | 73.4 | 9 | 99.9 | 4 |
| LO - LOT Polish Airlines | 20 821 | | 81.2 | 10 | 83.2 | 10 | 97.3 | 23 | 521 | | 61.8 | 14 | 62.2 | 15 | 99.8 | 5 |
| LX - Swiss International Airlines | 29 324 | | 79.8 | 13 | 80.3 | 16 | 98.6 | 13 | 3 589 | | 76.5 | 4 | 75.5 | 7 | 99.4 | 10 |
| MA - Malev Hungarian Airlines | 11 041 | | 85.9 | 1 | 86.1 | 3 | 98.4 | 15 | 96 | | 58.3 | 16 | 84.4 | 1 | 100.0 | 1 |
| OA - Olympic Airlines | 18 214 | | 77.6 | 16 | 76.5 | 25 | 96.1 | 24 | 356 | | 49.2 | 20 | 58.1 | 19 | 99.2 | 12 |
| OK - CSA Czech Airlines | 17 064 | | 83.8 | 2 | 91.0 | 1 | 99.2 | 7 | 194 | | 61.9 | 12 | 83.0 | 2 | 100.0 | 1 |
| OS - Austrian | 35 719 | | 82.4 | 7 | 81.8 | 13 | 98.6 | 13 | 1 520 | | 84.5 | 1 | 80.9 | 3 | 99.7 | 7 |
| OU - Croatia Airlines | 4 888 | | 75.1 | 23 | 79.6 | 18 | 95.8 | 26 | | | | | | | | |
| PS - Ukraine International Airlines | | | | | | | | | | | | | | | | |
| RO - Tarom Romanian Airlines | 3 488 | | 82.6 | 5 | 88.3 | 2 | 98.8 | 10 | | | | | | | | |
| SK - SAS Scandinavian Airlines | 71 138 | | 75.3 | 22 | 77.0 | 22 | 98.1 | 17 | 1 480 | | 77.4 | 3 | 79.3 | 5 | 99.3 | 11 |
| SN - SN Brussels Airlines | 18 046 | | 80.8 | 11 | 80.5 | 15 | 99.2 | 7 | 1 042 | | 70.8 | 8 | 61.9 | 17 | 98.9 | 15 |
| TK - Turkish Airlines | 36 233 | | 77.0 | 19 | 82.9 | 11 | - | | 2 569 | | 60.6 | 15 | 75.5 | 7 | - | |
| TP - TAP Portugal | 21 777 | | 74.0 | 25 | 76.7 | 24 | 99.6 | 4 | 3 011 | | 51.1 | 19 | 57.2 | 20 | 98.7 | 17 |
| VS - Virgin Atlantic Airways | | | | | | | | | | | | | | | | |
| VV - AeroSvit | 5 579 | | 78.2 | 15 | 82.0 | 12 | 99.3 | 6 | 433 | | 33.7 | 21 | 38.3 | 21 | 98.4 | 19 |
| AEA | 915 470 | | 78.9 | | 80.4 | | 98.1 | | 73 412 | | 65.7 | | 68.3 | | 99.4 | |

REFER TO TIMELINE OF EVENTS AT THE END OF THIS REPORT FOR CAUSES OF DISRUPTIONS

The table includes information on punctuality performance for AEA member airlines. It is based on voluntary submission by AEA member airlines only.

Data is shown for short/medium haul and long haul services separately, reflecting their specific punctuality profiles. Total Short/Medium Haul includes operations within Europe, cross border and domestic, to North Africa and the Middle East. All other services are included in Long Haul.

Punctuality is measured by comparing actual times of arrival and departure to the scheduled times. Reference points are when the aircraft leaves from, or arrives at, its parking stand. For the purposes of this report, flights within 15 minutes of schedule are not regarded as delayed, but as 'on-time'.

Regularity measures the percentage of planned flights which actually operated. A flight may be cancelled due to bad weather, for technical reasons or other operational constraints. Any change in schedule up to 3 days before the planned day of operation is taken into consideration.

In this report no information is given about the cause of delays. More information on reason for delay can be found in the AEA quarterly press release of delay data, available from www.aea.be.

TIMELINE OF EVENTS

| Year | Date | Month | Week No | Week Dates | Country | Event |
|------|---------------|----------|---------|-------------|---------|---|
| 2008 | | January | | | Denmark | Copenhagen Area Control Centre moves to a new operations room and introduces a new integrated ATC system resulting in significant capacity reductions. |
| 2008 | 02/01/2008 | January | Week 01 | 31/12-06/01 | Balkans | Heavy snow storms in Bulgaria and Romania. |
| 2008 | 11/02/2008 | February | Week 07 | 11/02-17/02 | France | ATC strike affects flights to/from Paris CDG and Orly |
| 2008 | 12/02/2008 | February | Week 07 | 11/02-17/02 | All | French ATC strike affects flights to/from Paris CDG and Orly. Greek ATC strike begins at 22:00. |
| 2008 | 13/02/2008 | February | Week 07 | 11/02-17/02 | All | Greek ATC strike, all flights cancelled. French ATC strike ends 18:00. |
| 2008 | 19/02/2008 | February | Week 08 | 18/02-24/02 | Italy | 123 AZ flights cancelled due to ground workers strike at Milan's Linate, Malpensa airports. |
| 2008 | 29/02/2008 | February | Week 09 | 25/02-02/03 | All | 2008 Leap Year (29 days) |
| 2008 | 01/03/2008 | March | Week 09 | 25/02-02/03 | UK | LHR: Schedule disruption due high winds impacted baggage performance |
| 2008 | 01/03/2008 | March | Week 09 | 25/02-02/03 | | Danish ATM upgrade continues to cause delays throughout month. Strong winds affecting many European airports, FRA, MUC, AMS, ZRH. Delays in Germany up to 150mins plus with gusts of 90kts at MUC. Inbound delays at LHR with flow rates of 38/60 due wind. |
| 2008 | 02/03/2008 | March | Week 09 | 25/02-02/03 | | Strong winds affecting many airports, FRA, AMS, VIE, HAM. Brussels lower airspace partially closed due technical issues but little impact. |
| 2008 | 01-05/03/2008 | March | Week 09 | 25/02-02/03 | Europe | Emma (storm) causing lots of irregularities in Europe; airports partly closed |
| 2008 | 05/03/2008 | March | Week 10 | 03/03-09/03 | Germany | Token' strike by airport staff affecting LH flights, in part. Domestic and to/from Frankfurt. |
| 2008 | 05/03/2008 | March | Week 10 | 03/03-09/03 | Germany | FRA, HAM industrial action by handling personnel and firemen but little impact. Snow at FRA gave forecast delays of 60mins |
| 2008 | 06/03/2008 | March | Week 10 | 03/03-09/03 | Germany | Nationwide industrial action - strike of airport ground handling staff walk out of ground crew workers, baggage handlers, check-in handlers, airport fire fighters |
| 2008 | 07/03/2008 | March | Week 10 | 03/03-09/03 | Germany | Gap because of nationwide strike March06 |
| 2008 | 10/03/2008 | March | Week 11 | 10/03-16/03 | All | Heavy winds and storm across Europe, in particular UK, France. |
| 2008 | 10/03/2008 | March | Week 11 | 10/03-16/03 | UK | Very strong winds and rain at LHR, LGW. A number of short-haul flights cancelled. |
| 2008 | 11/03/2008 | March | Week 11 | 10/03-16/03 | | High delays at LHR, AMS, FRA, FCO caused by wind and rain. |
| 2008 | 13/03/2008 | March | Week 11 | 10/03-16/03 | UK | LHR: Security breach at north side of airport resulted in a single runway operation. This caused major schedule disruption & impacted baggage performance |
| 2008 | 13/03/2008 | March | Week 11 | 10/03-16/03 | | Delays in Germany due staffing and capacity. BRU radar failure causing delays. Security incident at LHR leading to long inbound/outbound delays. |
| 2008 | 14/03/2008 | March | Week 11 | 10/03-16/03 | Germany | FRA: ATC; high quantity of passengers; many passengers missed their flights |
| 2008 | 16/03/2008 | March | Week 11 | 10/03-16/03 | UK | Departure delays at LHR throughout most of day due over demand, possible result of US clock change. |
| 2008 | 17/03/2008 | March | Week 12 | 17/03-23/03 | | Single runway ops at BRU, CPH, HAM due strong winds. First day of CFMU industrial action. Little impact. |
| 2008 | 18/03/2008 | March | Week 12 | 17/03-23/03 | | ARN closed for 2 hrs due snow storms. SIA A380 commences operations to LHR. |
| 2008 | 18/03/2008 | March | Week 12 | 17/03-23/03 | | CBA1 once again causing long delays due to both French and Belgian Military activity. MAN early morning delays due low vis. |
| 2008 | 19/03/2008 | March | Week 12 | 17/03-23/03 | Greece | General strike in Greece, including airports and air traffic. |

TIMELINE OF EVENTS

| Year | Date | Month | Week No | Week Dates | Country | Event |
|------|---------------|-------|---------|-------------|---------|--|
| 2008 | 19/03/2008 | March | Week 12 | 17/03-23/03 | | NAP closed for short period due air display. Greek ATC strike. More snow for ARN. CFMU strike continues, little impact |
| 2008 | 19/03/2008 | March | Week 12 | 17/03-23/03 | Greece | Strike |
| 2008 | 21/03/2008 | March | Week 12 | 17/03-23/03 | | Heavy snow in GVA. Delays compounded by ILS failure. Strong winds at LHR, FRA, MUC, AMS and ZRH |
| 2008 | 22/03/2008 | March | Week 12 | 17/03-23/03 | All | Heavy snowfall throughout Europe. |
| 2008 | 22/03/2008 | March | Week 12 | 17/03-23/03 | | Italian ATC strike. MAD & ZRH arrival delays |
| 2008 | 20-23/03/2008 | March | Week 12 | 17/03-23/03 | UK | LHR: Major schedule disruption due snow, ice and strong winds impacted baggage performance |
| 2008 | 24/03/2008 | March | Week 13 | 24/03-30/03 | All | Easter Monday 2008 |
| 2008 | 25/03/2008 | March | Week 13 | 24/03-30/03 | Belgium | Brussels airport suffered many delays due to heavy snowfall. |
| 2008 | 27/03/2008 | March | Week 13 | 24/03-30/03 | UK | LHR: T5 operation starts Initial arrival rates 38/60. Long delays beg to develop due baggage system problems. 10 flights cancelled. |
| 2008 | 28/03/2008 | March | Week 13 | 24/03-30/03 | UK | LHR: problems continue. 20 plus flights cancelled. Strike in LIBB FIR affecting a number of flights but little impact |
| 2008 | 27-31/03/2008 | March | Week 13 | 24/03-30/03 | UK | LHR: T5 problems with world-wide consequences on bag performance |
| 2008 | 31/03/2008 | March | Week 14 | 31/03-06/04 | UK | LHR: T5 problems continue. Arrival delays giving 25-30mins delay however these quickly clear. |