



The Hot Stuff on Airline Recruiting

ACI-NA Air Service & Data Planning Seminar

January 24-25, 2008, in New Orleans



Luring a Low-Fare Carrier

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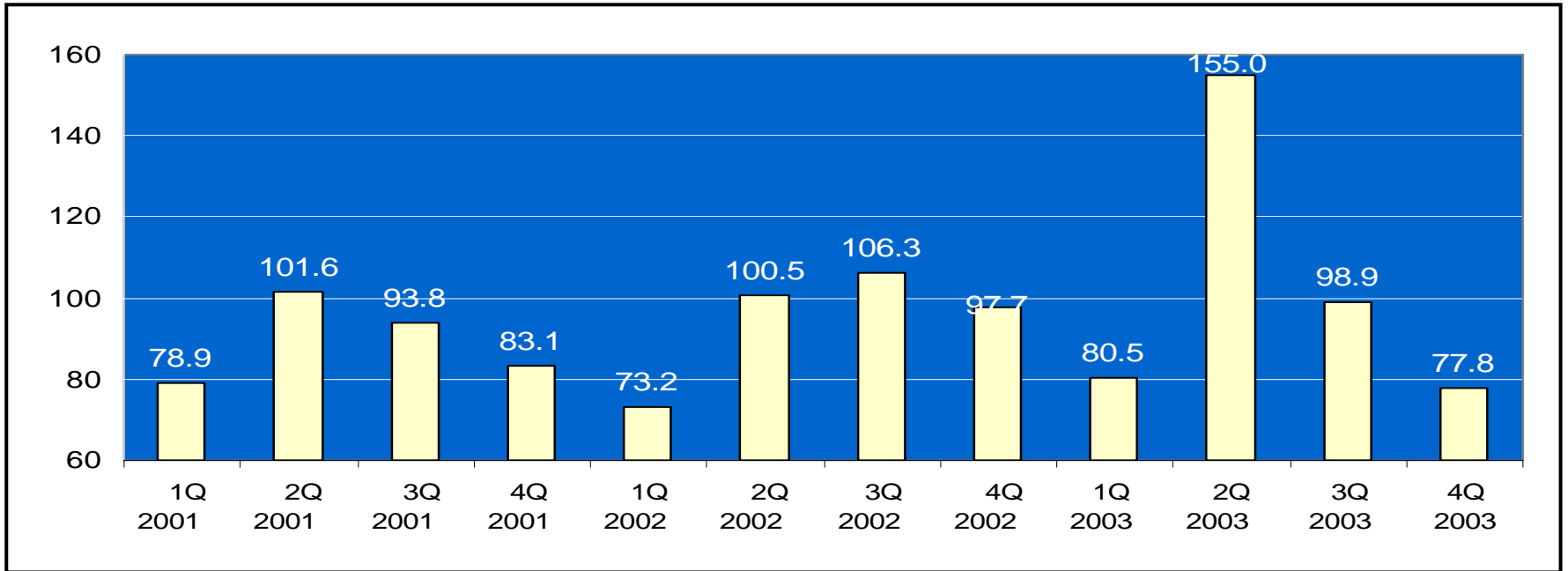
January 25, 2008



METROPOLITAN WASHINGTON
AIRPORTS AUTHORITY

New Orleans Visit – January 25, 2008

- Population & Demographics
- Business & Employment
- Route Proposal
- CBSA versus Market O&D
- Catchment Area
- Airport Statistics
- Airport Facility



CMH O&D Rank



24

Incentive Available

PPDEW

103

Market Share

AA	2.2%	UA	4.3%
CO	13.0%	US	26.3%
DL	9.6%	WN	4.2%
HP	23.7%	XX	0.6%
NW	16.2%	YX	0.0%

2Q/3Q 2002

AA	10.22	UA	6.93
CO	11.78	US	19.54
DL	8.68	WN	15.19
HP	26.59	XX	20.78
NW	9.95	Avg.	17.91

HP enjoyed over an 8.0 yield premium

2Q/3Q 2003

AA	13.23	UA	14.13
CO	14.22	US	14.86
DL	12.45	WN	15.69
HP	19.44	XX	20.13
NW	11.39	YX	25.44
		Avg.	14.16

WN had a higher yield than US, DL, CO, UA & AA.

3Q 2002

AA	11.34	UA	6.98
CO	11.66	US	19.25
DL	8.79	WN	15.47
HP	27.15	XX	20.13
NW	9.28	Avg.	17.70

HP enjoyed over a 9.0 yield premium

3Q 2003

AA	11.38	US	15.39
CO	14.26	WN	16.37
DL	12.83	XX	20.13
NW	11.28	YX	25.44
UA	16.80	Avg.	13.79

WN had a higher yield than US, DL, CO & AA.

Opportunity for a proven O&D market with a solid yield.

12 Months ending 4Q 2003

AA	11.94	UA	15.08
CO	15.16	US	15.54
DL	12.93	WN	15.62
HP	19.88	XX	20.13
NW	12.02	YX	25.44
		Avg.	15.32

WN has a higher yield than US, DL, CO, UA & AA.



CMH O&D Rank

18

PPDEW

130

Market Share by Carrier

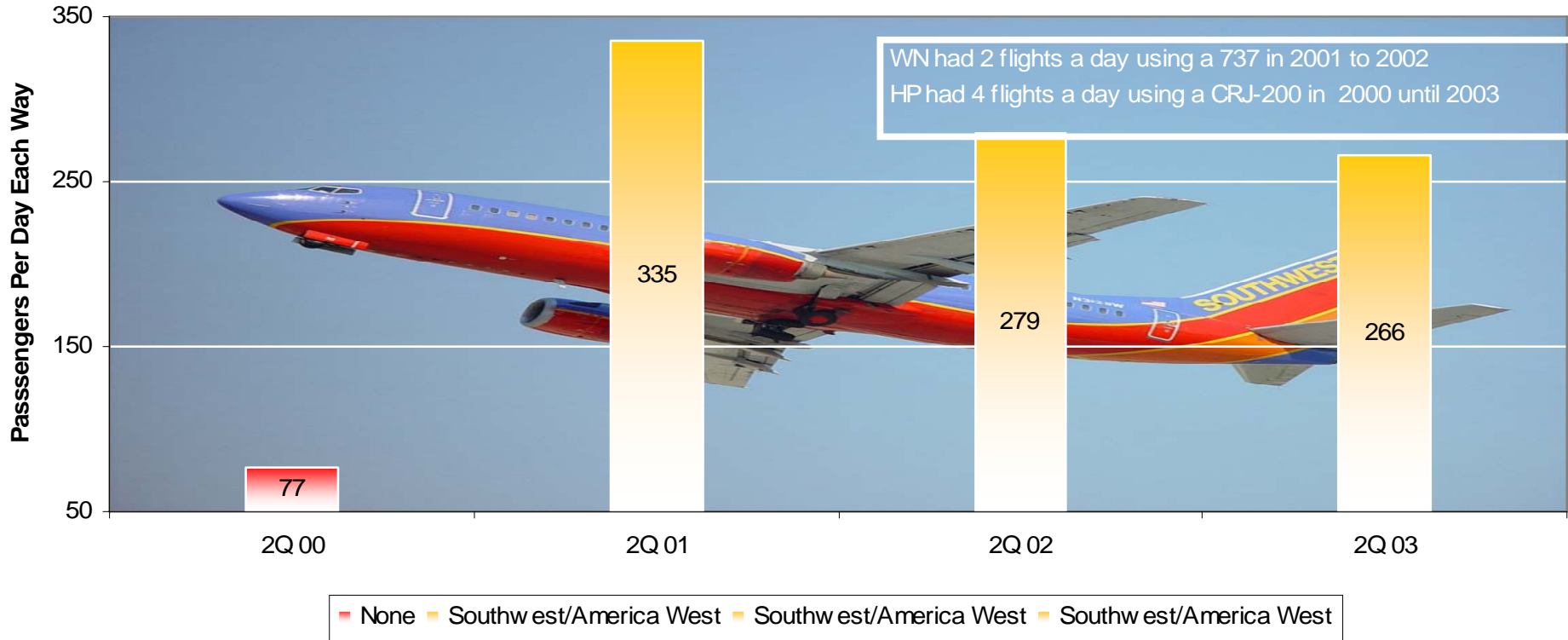
AA	1.3%	UA	8.5%
CO	0.8%	US	83.5%
DL	2.4%	WN	0.0%
NW	2.1%	XX	1.4%

Southwest Airlines - BWI Stimulation 101

	PPDEW	Market Share Leader
2Q 2000 - BWI O&D:	78	US
WN enters market		
2Q 2001 - BWI O&D:	336	WN

Baltimore New Market Stimulation

Daily passengers from Port Columbus to Baltimore for select periods



Independence Air Low Fare Stimulation

From CMH To:	QTR	Non Stop Seats %	Fare %	Pax %	PPDEW	Avg. FARE
Atlanta	4Q03				185	157
	4Q04	-1.9%	-23.06%	33.51%	247	120.44
Hartford	3Q04				64	111.52
	4Q04	n/a	-0.09%	-14.57%	64.5	107.39
Nashville	4Q03				71.5	89.76
	4Q04	0.0%	-3.55%	7.69%	77	86.57
Boston	4Q03				123	158.83
	4Q04	8.6%	-23.06%	37.80%	169.5	122.20
Burlington	4Q03				9	152.07
	4Q04	n/a	-34.10%	0.00%	9	100.21
Buffalo	4Q03				8	177.24
	4Q04	n/a	-31.38%	-6.25%	7.5	121.63
Columbia Metro	4Q03				14.5	164.04
	4Q04	n/a	-36.02%	27.59%	18.5	104.96
Charleston S.C.	4Q03				19	146.63
	4Q04	n/a	-30.21%	39.47%	26.5	102.34

How did CMH land Skybus Airlines:

Location – Founder John Weikle lived in Dayton, Ohio

Opportunity – HP downsizes from 49 departures to 4 a day

History – Success of Southwest, ValuJet and other small airlines to make CMH work.

Partnership – Airport and airline were able to meet half way on many items.

The future is unwritten...

THANK YOU