

The Heathrow Forecast:

Growth, Expansion and New Markets



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The Heathrow Forecast: Growth, Expansion and New Markets

Now that the UK Government has officially decided to back a third runway at Heathrow, OAG is looking to the future – 10 years from now. What's the future impact on the UK? How will the investment improve connectivity? Which carriers will get to operate on this new, very precious scrap of tarmac?

Before we get ahead of ourselves, let's remember that a lot of work remains: planning approvals, appeals to planning decisions, legal disputes around process and protocol, construction, infrastructure development and more. Assuming that there is a smooth path to the development programme and no Berlin Brandenburg type incidents, the third runway will be operational around 2027.

Using our data and analysis tools, this report forecasts how the additional runway will benefit the UK, increase connectivity to the world and impact the local and global travel market.



The Key Facts: Projecting Capacity Growth

The new runway will increase capacity to some 740,000 movements which will represent an increase of some 260,000 per annum on the current limit of 480,000. Those additional movements will increase the airport's capacity to 130 million passengers per annum; an increase of 54 million. This means a 35 percent increase in movements will generate an additional 71 percent increase in passengers when fully used.

Another way to look at this is that each new flight movement would have to generate around 240 passengers if all the passenger growth came from new flights. The current average based on Heathrow's own numbers is closer to 163¹, suggesting that a lot of those new flight movements will be with larger aircraft types with more seats than the current airport average.

The Battle for Airline Slots

The allocation of the new slots will be subject to very close scrutiny; after all, it's not every day that airlines gain increased access to one of the world's premium airports, and with slots trading upwards of USD75 million recently, these are very valuable gifts to be giving.

Under the EU Airport Slot Regulations, established in 1993, "new entrant" airlines have priority access to 50 percent of any new slots established free of charge. The remaining balance of available slots is then distributed across existing airline operators wishing to expand their operations in an open and transparent manner. So, the key question is how all of those slots would be used.

The Domestic Case, which is central to the Heathrow case, is the claim that new services to UK airports would be given priority in any slot allocation process. So, then what could be expected from such priority allocation?

Initially, taking Amsterdam Schiphol as a benchmark for connectivity from UK airports, we have assumed that for those UK regional airports that currently have no service to Heathrow, the level of connectivity achieved would be comparable to that currently offered to Amsterdam Schiphol.

We have then assumed that those additional domestic airports will all be served at least three times per day on weekdays and twice a day on each weekend day. The summary of that analysis below shows those UK airports could be given access to Heathrow under the domestic priority programme and the levels of both weekly and annual frequency that would be taken by those services.

¹ Heathrow Traffic Statistics Jan-Jun 2018

Table 1 - Domestic Slot Usage at Heathrow, New Services 2027

Departing Airport	Weekly Frequency To Amsterdam	Potential Weekly Frequencies to Heathrow 2027	Number of Weekly Slots Allocated	Number of Slots Allocated Per Annum
Belfast International Apt	9	19	38	1,976
Doncaster/Sheffield	7	19	38	1,976
Durham	14	19	38	1,976
Exeter	7	19	38	1,976
Humberside	20	19	38	1,976
Liverpool	13	19	38	1,976
Norwich	24	19	38	1,976
Dundee	0	19	38	1,976
City of Derry	0	19	38	1,976
Prestwick	0	19	38	1,976
Carlisle	0	19	38	1,976
Isle of Man	0	19	38	1,976
Jersey	0	19	38	1,976
Guernsey	0	19	38	1,976
Newquay	0	19	38	1,976
Total	94	285	570	29,640

Source: OAG

Typically for such low-frequency operations to be successful and sustainable over time, connecting traffic will be an important factor. Therefore, it would be reasonable to assume that this new wave of domestic services will be scheduled to arrive into LHR in the peak hour of 08:00 – 09:00 with corresponding departures back to the regions somewhere between 08:45 and 09:30. This would create strong connectivity to both a range of North American and other European markets.

A complementary wave of new domestic services would be required to meet both the returning same day business market to London and connecting flows back inbound from Europe, so a late evening service arriving at Heathrow in the 18:00 – 19:00 hour with corresponding return flights around 18:45-19:45 would be necessary. With the assumption of a minimum three times daily frequency, that would leave a middle of the day service to be scheduled as deemed the most commercially viable by the operating airline.

Map: Potential UK Domestic Connectivity to Heathrow with Third Runway



Source: OAG Mapper

Collectively, if all of these UK regional airports were served with a minimum of 19 weekly services, they would absorb around 11 percent of the new slot pool that will have been created by the third runway development. Assuming that on average, the capacity of these flights would be around 143 seats, which is close to the current level per movement to the secondary UK markets served, this would equate to some 4.2 million seats. Apply an average 75 percent passenger load factor to those services and these new services could deliver approximately 2.7 million passengers – five percent of the claimed target for 11 percent of the new slots made available as Table 2 highlights.

Table 2 - Potential Passenger Volumes from New Domestic Services to Heathrow

Belfast International Apt	Potential Weekly Frequency	Yearly Capacity	Assumed 75% Load Factor
Doncaster/Sheffield	19	256,880	192,660
Durham	19	256,880	192,660
Exeter	19	256,880	192,660
Humberside	19	256,880	192,660
Liverpool	19	256,880	192,660
Norwich	19	256,880	192,660
Dundee	19	256,880	192,660
City of Derry	19	256,880	192,660
Prestwick	19	256,880	192,660
Carlisle	19	256,880	192,660
Isle of Man	19	256,880	192,660
Jersey	19	256,880	192,660
Guernsey	19	256,880	192,660
Newquay	19	256,880	192,660
Total	266	3596320	2,697,240

Source: OAG

Heathrow's Inbound Orange Glow

Whilst much of the case for the third runway has been based around increased domestic connectivity and access to new emergent markets around the globe, we believe that the majority of new slots will be consumed by European services and that many will have a decidedly orange tint in a network map. Our core assumption: major low-cost airlines such as EasyJet, which has already expressed an interest in serving Heathrow, would seek to secure a large part of the new entrant slot capacity available.

Subject to fleet availability and slots at other airports, we would expect an airline such as EasyJet to launch services to and from Heathrow. With 10 European bases, its likely services would be opened from all of those bases. Many are major commercial centres in their own right and will have significant proportions of business traffic that a new competitive offering could attract very quickly.

Assuming that a pan-European based low-cost carrier would want to serve one of the world's premium markets from all its bases and using EasyJet as an example, applying some typical frequencies and load factors creates close to four million new Heathrow passengers once services are fully established, as Table 2 highlights.

Table 3 - Potential New Services to Heathrow from European Bases

Heathrow to:	Weekly Frequency	Per Annum Frequency	Slots Required	Capacity Per Movement	Passengers At 92% Load Factor
Berlin	20	1,040	2,080	353,600	325,312
Basel	20	1,040	2,080	353,600	325,312
Geneva	40	2,080	4,160	707,200	650,624
Paris	20	1,040	2,080	353,600	325,312
Toulouse	24	1,248	2,496	424,320	390,374
Lyon	13	676	1,352	229,840	211,453
Nice	40	2,080	4,160	707,200	650,624
Lisbon	25	1,300	2,600	442,000	406,640
Milan Malpensa	20	1,040	2,080	353,600	325,312
Rome	20	1,040	2,080	353,600	325,312
Total	242	12,584	25,168	4,278,560	3,936,275

Source: OAG

Map: Potential Inbound Services to Heathrow from EasyJet European Bases


Source: OAG Mapper

The European Outbound Wave: New airlines, new routes, new travellers

Based on the weekly schedule for the 23rd July 2018, there are 66 European cities that have a scheduled service from London Gatwick, but no service from Heathrow. Many of those are operated today by a range of low-cost airlines that would certainly be attracted by access to a premium yielding airport market.

As with the inbound European market opportunity, a key issue aside from slots will be fleet availability and required crew resources. Again, taking EasyJet as an example, it currently has a Gatwick base with 60 aircrafts; replicating that size and scale of operation at Heathrow is almost impossible from the opening of the third runway. We should therefore expect a phasing in of such new services, perhaps over an 18-month period, which would also allow Heathrow to place a tiered slot opening programme into place, protecting operational integrity as the third runway becomes established.

Indeed, for any Gatwick or Stansted based airline with a sizeable base, a key unanswered strategic question is whether they would move all of their capacity to Heathrow if possible or view Heathrow as a complementary market and operate from multiple bases. Our assessment, based on previous global experiences, is that during an initial period of time, European airlines with multiple frequencies would view the new market opportunity as complementary and would not lead to a major move from Gatwick. In simple strategic terms, why would you move and give up valuable slots and market strength at an airport with 46 million passengers per annum?

With the above caveats in place and using the current market as a starting point, we have developed a forecast of potential new outbound markets that could be launched from Heathrow along with indicative frequencies, capacity and load factor, listed in Table 3.

Assuming that such services are phased in over three IATA seasons (18 months) and equally distributed, then the impact would be approximately 5.5 million new passengers to Heathrow in the first full year and a further 5.5 million by the end of year two; a total of around 11 million new outbound travellers.

The addition of 11 million new outbound travellers from Heathrow is not merely a case of latent demand that will finally be served. Initially, there will be an excess of capacity in the total London market which will in turn lead to some very competitive fares during the developmental stages of the third runway opening; good news for all travellers, at least for a while.

Table 4 - Potential “Outbound” European Markets with a Third Heathrow Runway

London Gatwick to:	Weekly Frequency	Per Annum Frequency	Slots Required	Capacity Per Movement	Passengers At 92% Load Factor
Alicante Airport	66	3,432	6,864	1,166,880	1,073,530
Naples Capodichino Apt	35	1,820	3,640	618,800	569,296
Dalamani	33	1,716	3,432	583,440	536,765
Porto	31	1,612	3,224	548,080	504,234
Bordeaux Merignac Apt	30	1,560	3,120	530,400	487,968
Valencia Airport	28	1,456	2,912	495,040	455,437
Irakleion	27	1,404	2,808	477,360	439,171
Paphos	27	1,404	2,808	477,360	439,171
Dubrovnik	26	1,352	2,704	459,680	422,906
Verona Villafranca Airport	26	1,352	2,704	459,680	422,906
Antalya	24	1,248	2,496	424,320	390,374
Rhodes	22	1,144	2,288	388,960	357,843
Catania	19	988	1,976	335,920	309,046
Lanzarote	18	936	1,872	318,240	292,781
Funchal	16	832	1,664	282,880	260,250
Thessaloniki	16	832	1,664	282,880	260,250
Montpellier Mediterranee Apt	14	728	1,456	247,520	227,718
Riga	14	728	1,456	247,520	227,718
Bergen	13	676	1,352	229,840	211,453
Sevilla Airport	13	676	1,352	229,840	211,453
Bari	12	624	1,248	212,160	195,187
Bodrum Milas Airport	12	624	1,248	212,160	195,187
Kos	10	520	1,040	176,800	162,656
Biarritz	8	416	832	141,440	130,125
Florence Peretola Apt	8	416	832	141,440	130,125
Fuerteventura	8	416	832	141,440	130,125
Tirana	8	416	832	141,440	130,125
Burgas	7	364	728	123,760	113,859
Genoa	7	364	728	123,760	113,859
Istanbul Sabiha Gokcen Apt	7	364	728	123,760	113,859
La Rochelle	7	364	728	123,760	113,859
Turin Caselle Airport	7	364	728	123,760	113,859
Cagliari	6	312	624	106,080	97,594
Izmir Adnan Menderes Apt	6	312	624	106,080	97,594
Preveza/Lefkada	6	312	624	106,080	97,594
Varna	6	312	624	106,080	97,594
Skiathos	5	260	520	88,400	81,328

London Gatwick to:	Weekly Frequency	Per Annum Frequency	Slots Required	Capacity Per Movement	Passengers At 92% Load Factor
Tivat	5	260	520	88,400	81,328
Limoges	4	208	416	70,720	65,062
Ljubljana	4	208	416	70,720	65,062
Minsk International Apt	4	208	416	70,720	65,062
Reus	4	208	416	70,720	65,062
Santiago de Compostela	4	208	416	70,720	65,062
Trondheim Vaernes Airport	4	208	416	70,720	65,062
Aalborg Airport	3	156	312	53,040	48,797
Granada	3	156	312	53,040	48,797
Ancona	2	104	208	35,360	32,531
Bastia	2	104	208	35,360	32,531
Girona Costa Brava Apt	2	104	208	35,360	32,531
Kavala	2	104	208	35,360	32,531
Podgorica	2	104	208	35,360	32,531
Tbilisi	2	104	208	35,360	32,531
Volos	2	104	208	35,360	32,531
Ajaccio	1	52	104	17,680	16,266
Alghero	1	52	104	17,680	16,266
Jerez	1	52	104	17,680	16,266
Mytilini	1	52	104	17,680	16,266
Ponta Delgada	1	52	104	17,680	16,266
Samos	1	52	104	17,680	16,266
Total	683	35,516	71,032	12,075,440	11,109,405

Source: OAG

Long-Haul Opportunities

While much of the case for a third runway has been based around increased connectivity to the rest of the world and increased trade opportunities, long-haul opportunities capture more imagination than just another European destination.

Those opportunities for long-haul development break down, we believe, into three areas: the expansion of services to mature markets, emergent markets and of course the fashionable long-haul low-cost segment.

The Mature Markets: Leisure Possibilities Abound

London is already well connected to the more mature markets in regions such as North America, the Middle East, Indian subcontinent and South East Asia and indeed better served than most European peer airports. Of course, some of those services are operated to London Gatwick, most notably Florida, the Caribbean and seasonal long-haul leisure/sun markets of British Airways and Virgin Atlantic and some movement in part of those flights could be expected.

The current long-haul networks of British Airways and Virgin at Gatwick are outlined in the map below. The majority of these destinations are not served from Heathrow and whilst current load factors are high, it would be reasonable to expect some yield improvement over and above any incremental cost incurred.

Map: Current British Airways and Virgin Networks at London Gatwick, Winter 2017/18 to Summer 2019 inclusive.



Source: OAG Mapper

We believe that up to 14 long-haul leisure destinations could be operated from Heathrow which are currently only operated on a non-stop basis from Gatwick. We have outlined those destinations in Table 5, assuming frequency and subsequent capacity, and potential load factors of those services.

Table 5 - Potential Long-Haul Service Moves to Heathrow from Gatwick

Destination	Potential Weekly Frequency	Per Annum ATMs	Yearly Capacity	Assumed 85% Load Factor
Antigua	7	728	203,840	173,264
Barbados	14	1,456	407,680	346,528
Bridgetown	10	1,040	291,200	247,520
Cancun	14	1,456	407,680	346,528
Ft Lauderdale/ Hollywood	7	728	203,840	173,264
Havana	5	520	145,600	123,760
Lima	5	520	145,600	123,760
Male	5	520	145,600	123,760
Oakland	7	728	203,840	173,264
Orlando	14	1,456	407,680	346,528
Punta Cana	7	728	203,840	173,264
San Jose	7	728	203,840	173,264
St Lucia	7	728	203,840	173,264
Tampa	7	728	203,840	173,264
Total	116	12,064	3,377,920	2,871,232

Source: OAG

With at least two of the identified destinations likely to be operated with double daily frequency, we estimate that there could be just over 12,000 ATMs used for such services and around 2.8 million passengers in a mature operation of the third runway. That would equate to 238 passengers per Air Traffic Movement (ATM), which is the first set of markets that would appear to match the Heathrow planning case of 240 passengers per ATM.

The Mature Markets: Meeting North American Demand

Amongst the mature markets, we have also looked at destinations that have either previously been operated to London by a carrier or are currently in operation to another major European hub airport such as Paris, Amsterdam, Frankfurt, Madrid and Brussels. These destinations could be described as the marginal cities, which are destinations where connecting traffic across airline alliances is crucial to the commercial success of the service. Since we are projecting nearly 10 years out on what could be possible, we have assumed that current marginal cities will have developed from their current sizes and be capable of supporting services from London, and particularly an airport such as Heathrow where connectivity will be available.

Using this selection criteria, we have identified eight more cities that could be served from the opening of a third runway. With the exceptions of Caracas and Harare, two markets that have current challenges, the remainder of identified cities are in North America and offer some degree of proven demand to London. In total, these eight cities would deliver around a further 1.2 million passengers using 5,200 ATMs.

Table 6 - Potential Returning Long-Haul Destinations to Heathrow

Destination	Potential Weekly Frequency	Per Annum ATMs	Yearly Capacity	Assumed 85% Load Factor
Anchorage	5	520	145,600	123,760
Caracas	5	520	145,600	123,760
Cincinnati	7	728	203,840	173,264
Harare	7	728	203,840	173,264
Indianapolis	7	728	203,840	173,264
Pittsburgh	7	728	203,840	173,264
Quebec	5	520	145,600	123,760
St Louis	7	728	203,840	173,264
Total	50	5,200	1,456,000	1,237,600

Source: OAG

Emerging Markets: A More Accessible China

An important part of the third section of the runway case is increased access to emergent markets, with a particular focus on China and South East Asia, where the majority of major growth markets are located. The development of ultra-long-range aircraft, such as the B787 and A350 also help form a supporting case for these markets.

Identifying these markets remains open to debate – especially given the current bilateral issues in selected markets around the frequency of service that may need to be addressed. That said, we have attempted to identify potential markets that could be connected.

Our premise for selection has been to identify those airports in both North and South East Asia that handle in excess of 10 million scheduled outbound seats per annum that currently have no service to London. In total - and accepting that a few of the listed airports already have alternate airport service to London - there are 26 emergent long-haul destinations that could be linked to Heathrow, with the addition of a third runway.

Many, if not all of these are markets, you would expect to be operated by inbound carriers and for many, optimal scheduling may be for an early morning arrival in London, which could prove challenging given the expected levels of demand. Yet as we have already noted, new entrants will have some priority in securing slots.

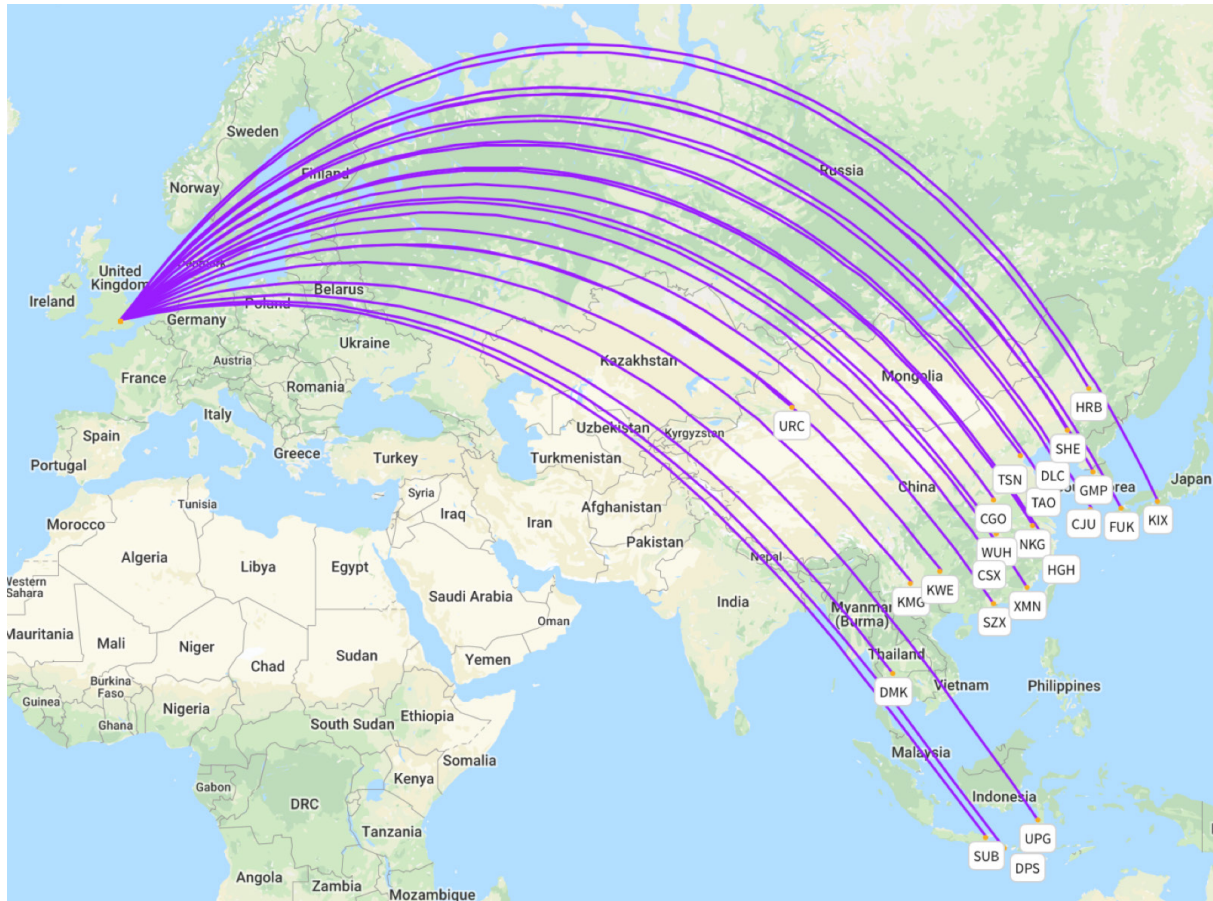
In total, these emergent long-haul markets are capable of delivering 4.2 million passengers when fully matured and established in the market whilst taking 17,600 ATMs per annum.

Table 7 - Potential Emergent Market Long-Haul Services to Heathrow

Dep Airport Name	Scheduled Outbound Seats 2017 (Total)	Existing London Service	Potential Weekly Frequency	Per Annum ATMs	Yearly Capacity	Assumed 85% Load Factor
Shenzhen	27,401,923	No	7	728	203,840	173,264
Kunming	27,208,531	No	5	520	145,600	123,760
Bangkok Don Mueang International	23,142,740	No	7	728	203,840	173,264
Hangzhou	21,045,487	No	7	728	203,840	173,264
Nanjing	16,042,688	No	7	728	203,840	173,264
Xiamen	15,530,007	No	7	728	203,840	173,264
Fukuoka	15,035,151	No	7	728	203,840	173,264
Zhengzhou	15,027,714	No	7	728	203,840	173,264
Sapporo New Chitose	14,697,739	No	5	520	145,600	123,760
Wuhan	14,660,636	No	7	728	203,840	173,264
Denpasar-Bali	14,590,540	No	7	728	203,840	173,264
Qingdao	14,555,418	No	7	728	203,840	173,264
Changsha	14,137,949	No	7	728	203,840	173,264
Surabaya	14,029,251	No	7	728	203,840	173,264
Urumqi	13,298,495	No	5	520	145,600	123,760
Okinawa Naha	13,194,613	No	5	520	145,600	123,760
Haikou	12,937,294	No	7	728	203,840	173,264
Tianjin	12,793,282	No	7	728	203,840	173,264
Jeju International	12,639,303	No	5	520	145,600	123,760
Seoul Gimpo International	12,069,178	No	5	520	145,600	123,760
Harbin	11,019,546	No	7	728	203,840	173,264
Guiyang	10,992,163	No	7	728	203,840	173,264
Dalian	10,856,647	No	7	728	203,840	173,264
Makassar	10,673,297	No	7	728	203,840	173,264
Shenyang	10,138,945	No	7	728	203,840	173,264
Osaka Intl (Itami)	10,092,906	No	7	728	203,840	173,264
Total	387,811,443		170	17,680	4,950,400	4,207,840

Source: OAG

Map: Long-Haul Emergent Market Opportunities



Source: OAG Mapper

Long-Haul Low-Cost Market Opportunity

There may be some irony in looking at low-cost long-haul services from an airport where the existing airlines have already expressed their concern around the cost of a third runway and supporting infrastructure. Of course, the jury remains out as to the real long-term success of such carriers; by the time the runway is complete, these carriers may have been absorbed into mega airline ownership structures, such as IAG or the Lufthansa Group.

The typical pattern of long-haul low-cost development is to operate in the markets with the greatest existing volumes and launch on the basis of taking other carrier share, as well as stimulating more traffic over time. With that in mind, we have identified the 20 largest long-haul markets from London with a sector length of over 3,000 miles as a cut-off point. Assuming a slightly higher and perhaps challenging 90 percent year-round load factor and a higher density configuration of 320 seats, we have listed the top long-haul low-cost destinations along with a projection of the volumes that will be carried.

Generating potentially an additional 4.4 million passengers when operating in an established market, the opportunities for long-haul low-cost probably stretch further than what we have outlined here, assuming the operating model can be proven.

Table 8 - Potential Long-Haul Low-Cost Services from Heathrow

Heathrow to:-	Sum of Scheduled Seats 2018 (Total)	Potential Weekly Frequency	Per Annum ATMs	Yearly Capacity	Assumed 90% Load Factor
Los Angeles	1,170,759	7	728	232,960	209,664
New York	1,112,783	14	1,456	465,920	419,328
Hong Kong	1,000,157	7	728	232,960	209,664
Singapore	993,804	7	728	232,960	209,664
Toronto	924,031	7	728	232,960	209,664
Chicago	806,604	7	728	232,960	209,664
San Francisco	652,088	7	728	232,960	209,664
Mumbai	639,710	7	728	232,960	209,664
Miami	615,194	7	728	232,960	209,664
Delhi	594,402	7	728	232,960	209,664
Washington (US) DC	560,331	7	728	232,960	209,664
Orlando	552,249	7	728	232,960	209,664
Johannesburg	533,340	7	728	232,960	209,664
Bangkok	518,855	7	728	232,960	209,664
Dallas	430,325	7	728	232,960	209,664
Vancouver	411,361	7	728	232,960	209,664
Tokyo	403,079	7	728	232,960	209,664
Atlanta	373,532	7	728	232,960	209,664
Las Vegas	355,900	7	728	232,960	209,664
Philadelphia	344,153	7	728	232,960	209,664
Total	12,992,657	147	15,288	4,892,160	4,402,944

Source: OAG

The OAG Forecast: Key Takeaways

When you add up the potential demand from each of the segments that we have identified, the numbers begin to look impressive - although perhaps not as large as the planning application.

Our summary table below suggests that if these individual scenarios were to play out, around 54 percent of the new ATMs would be used, generating around 50 percent of the forecasted new passenger growth. This clearly leaves plenty of space for existing carrier development and expansion of services and frequencies from some carriers.

Table 9 - Summary of Potential New Passenger Traffic at Heathrow with Third Runway by Segment

Opportunities	ATMs Used	Forecast Passengers	% Of New ATMs Used	% Of Forecast Passengers Generated
The Domestic Case	29,640	2,697,240	11.4%	4.4%
Heathrow's Inbound Orange Glow	25,168	3,936,275	9.7%	6.5%
The European Outbound Wave	35,516	11,109,405	13.7%	18.2%
Long-haul Mature Markets: Leisure	12,064	2,871,232	4.6%	4.7%
Long-haul Mature Markets: North America	5,200	1,237,600	2.0%	2.0%
Emerging Markets	17,680	4,207,840	6.8%	6.9%
Long-haul Low Cost	15,288	4,402,944	5.9%	7.2%
Total	140,556	30,462,536	54.1%	50.0%

Source: OAG

Securing such a level of new services, network expansion and passenger volumes would represent an exceptional level of growth, likely beyond any previous levels of increase seen at one airport, but such is the level of latent demand in the London market.

For those airlines that are already operating to Heathrow, the relatively rapid opening of new capacity will provide a fascinating range of strategic issues



to consider. The potential for increased frequency will be offset by increased competition, and enhanced connectivity for some will be challenged by more long-haul non-stop services. Yields will come under pressure for some operators, at least in the short term as new capacity is consumed.

There are of course questions to be answered that even until the first slot declarations are made, will remain open. For instance, is there enough fleet capacity across potential airlines to deliver the expected growth? Are there enough resources (particularly flight deck) to meet requirements? Most importantly, how will those new slots be dripped into the current operation since no airport can possibly accommodate such an immediate level of growth overnight, or can it?

In our cautious assessment of the opportunities, we project that over half of the new capacity could be used within two years from opening, if not faster allowing for existing carrier expansion. For such a large capacity increase to be absorbed so quickly it highlights the case for new runway capacity in London and the South East. It also suggests that we should already have a third runway and perhaps be planning a second elsewhere!

Our analysis leads us to conclude that the planned third runway would be positive for airlines, enhance global connectivity and, perhaps most importantly, increase competition at an already congested airport where premium yields exist, ultimately benefitting the traveller. All of which makes for a fascinating period with lots of questions being asked and few answers likely found until the first aircraft or Uber air taxi lands.



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We are the leading provider of digital flight information and our customers span the entire global travel ecosystem from airlines, airports, government agencies and aircraft manufacturers to travel technology leaders and service providers.

At the forefront of the travel market for years, we have the world's largest network of air travel data including the definitive schedules database of more than 980 airlines and the most extensive flight status information database in the market, tracking 96% of commercial flights.

We help our customers solve strategic, commercial and operational problems through wide variety of solutions from data APIs, dynamic multi-frequency data feeds to delivery of high value business insight through our analytics platform.

Today, OAG's customer network includes the world's largest airlines and airports, online travel agents (OTAs), the largest booking engine in Europe and the top travel, technology and ecommerce leaders across China, India, Indonesia, Latin America and North America.

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