

Star Alliance and IBTA

Working together to
best serve our customers

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What and Why is Star Alliance?

Our Key Deliverables

Why Your Best Practises are Also Ours

Our Network Value Proposition

How We Serve Spain & Portugal

Staying Ahead of the Game

Conclusion

What is Star Alliance?

Why Alliances?

What Do We Do?

Airline Alliances - Why?

For customers

- Global travel was complex and inconvenient.
- Connections were uncoordinated, problematic and time consuming.
- Frequent Flyer Benefits, including lounge access, did not extend beyond an individual airline offerings

For the airline

- Cross border mergers are difficult/impossible
- Global travel demand requires linking networks
- Increasing competition from no-frills/low-cost carriers

Three Basic Principles In The Best Interest Of Our Passengers

#1: Global Reach

- A world spanning network
- Superior connections
- Competitive sales products



Three Basic Principles In The Best Interest Of Our Passengers

#2: Worldwide Recognition

- Accumulating and redeeming miles on any member airline
- Priority travel benefits across the network



Three Basic Principles In The Best Interest Of Our Passengers

#3: Seamless Service

- Moving under one roof
- Joint facilities
- Superior transfer products



Managing Corporate Business Travel

A Best Practise

The 3 "C"s

The Three "C's" to Managing Business Travel

C Compliance

C Compliance

C Compliance

Managing Business Travel Requires

Control

- Dedicated Travel/Procurement Function
- A Managed Travel Policy

▪ Data

- What Gets Measured Gets Managed

▪ Communication

- We Are in this Together
- 3-legged stool (Corporation, Supplier, Agent)

▪ Simplicity

- KISS



Sales Programs To Help Drive Down Travel Expenses

- A unique value proposition
- Clear benefits for corporations, frequent flyers, business agents and meetings planners
- Simplicity

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Our Corporate Value Proposition

Tailor-made to reflect the needs of the corporate buyer*

- Market and airline inclusion as per their flying pattern
- The entire international purchasing power is recognized
- Best joint offer vs. single offer of Star Alliance member carriers
- One set of Star Alliance targets

*Legal restrictions and conditions apply

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Star Alliance Corporate Plus

The benefits include ... simplicity!

- Single point of contact
- Single agreement
- One negotiation
- Simplified performance reporting
- Streamlined communication



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Star Alliance Meetings Plus

Benefits are:

- One airline contact and one agreement for the meeting planner
- Simplified processing of RFP and contracting
- Interlineability of fare discounts

To qualify:

- At least 50 participants in total from at least three countries (not including the meeting destination)
- A lead time of 30 days minimum
- One travel agency (or more) assigned to issue the tickets for the meeting

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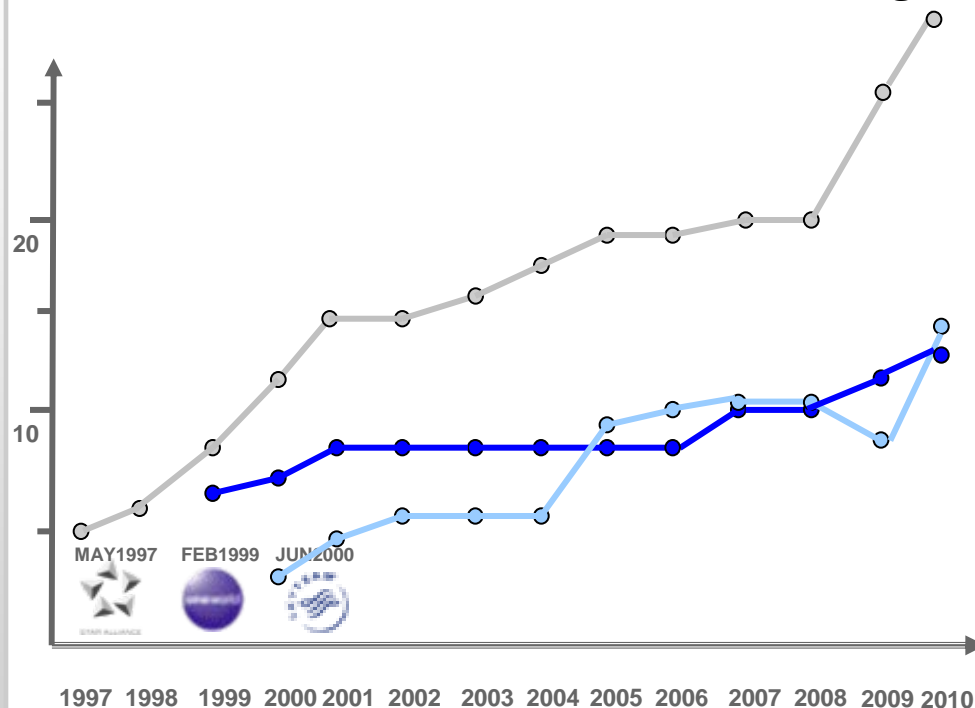


The Network Value Proposition of Star Alliance

Our Growth Is Driven by Our Customers

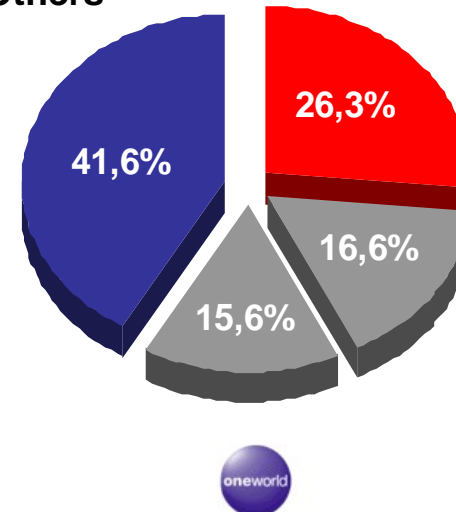
Star Alliance Has Grown Significantly Since Inception

Number of Members is Accelerating



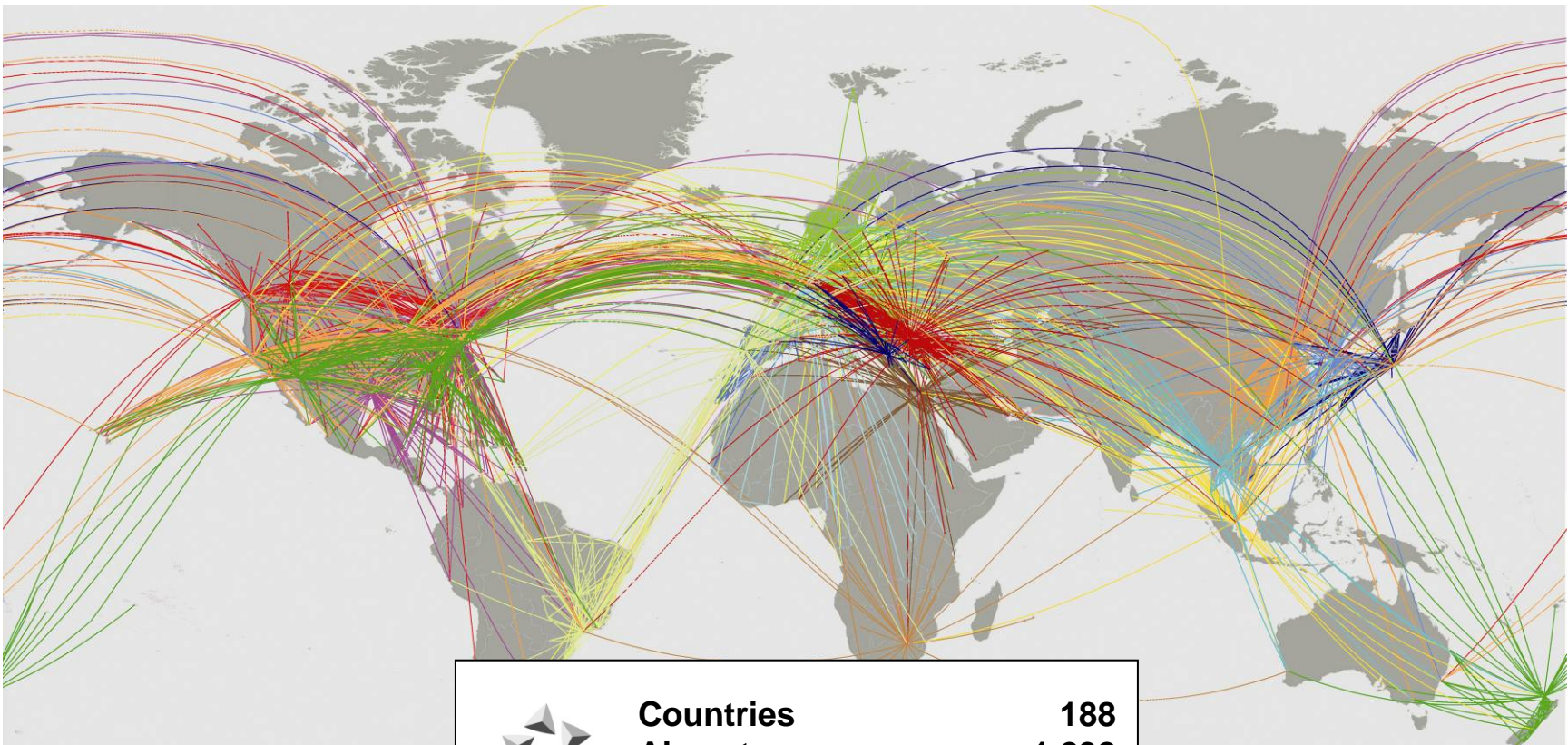
Substantial RPK Share

Others



Sources: Innovata, IATA WATS 53 (published 2009) & Air Transport Intelligence.
RPK shares based on 91.3% of the world ASK capacity with 8.7% estimated.

Star Alliance – Unsurpassed Global Reach



Countries	188
Airports	1,292
Daily Departures	22,518

What is the Proposition of Star Alliance in the Iberian Peninsula?

Depth and breadth that may surprise you

We provide a far-flung network for Spain



With strong regional strength



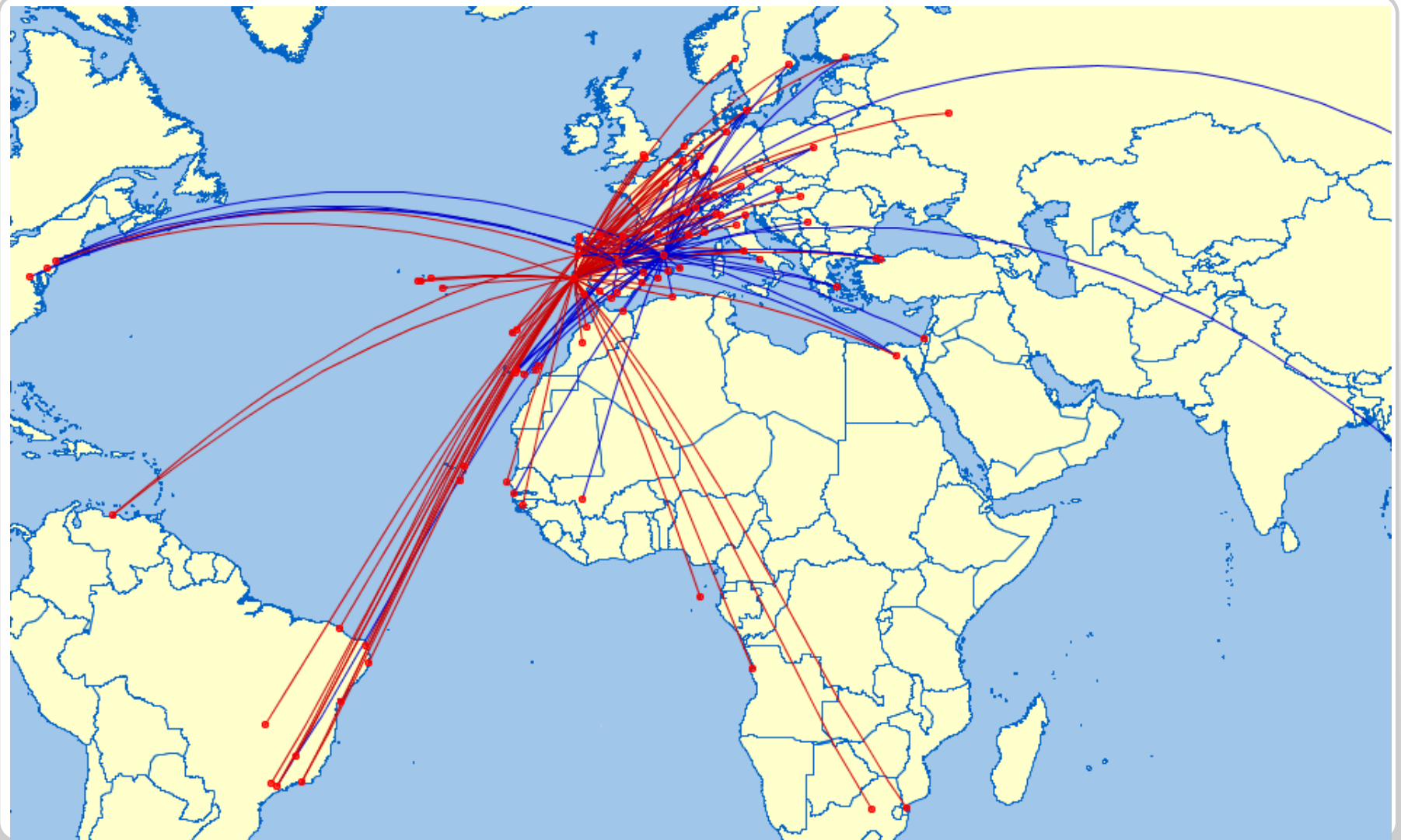
Portugal offers outstanding connectivity



Combined, a Broad Network to Europe from the Iberian Peninsula



... And An Even More Impressive InterContinental Offer



Star Alliance Presence in Spain & Portugal is Very Significant

- 22 members of the alliance are online
- 28 airports served in Spain & Portugal
- Almost 3,400 flights per week



ADRIA

AEGEAN



AIR CHINA

Continental Airlines

TAM

Blue

Lufthansa

POLISH AIRLINES
LOT

SWISS
Swiss International Air Lines

EGYPTAIR

Austrian

CROATIA AIRLINES

SAS
Scandinavian Airlines

brussels airlines

SINGAPORE AIRLINES

THAI

TURKISH AIRLINES

UNITED

U.S. AIRWAYS

In Madrid we are #2 behind oneworld

	Star Alliance	SkyTeam	oneworld
Destinations served	37	38	111
Countries served	16	20	45
Weekly frequencies	581 (17%)	545 (16%)	2199 (66%)

But Star Alliance Clearly Leads in Barcelona

	Star Alliance	SkyTeam	oneworld
Destinations served	60	22	24
Countries served	30	10	8
Weekly frequencies	723 (49%)	342 (23%)	407 (28%)

And Is Very Firmly Established in Lisbon

	Star Alliance	SkyTeam	oneworld
Destinations served	74	4	4
Countries served	34	3	3
Weekly frequencies	962 (87%)	70 (6%)	73 (7%)

Bigger is Better!

Myth: Being Big Means Sacrificing Quality

Airline Of The Year 2010: Our Member Asiana Airlines



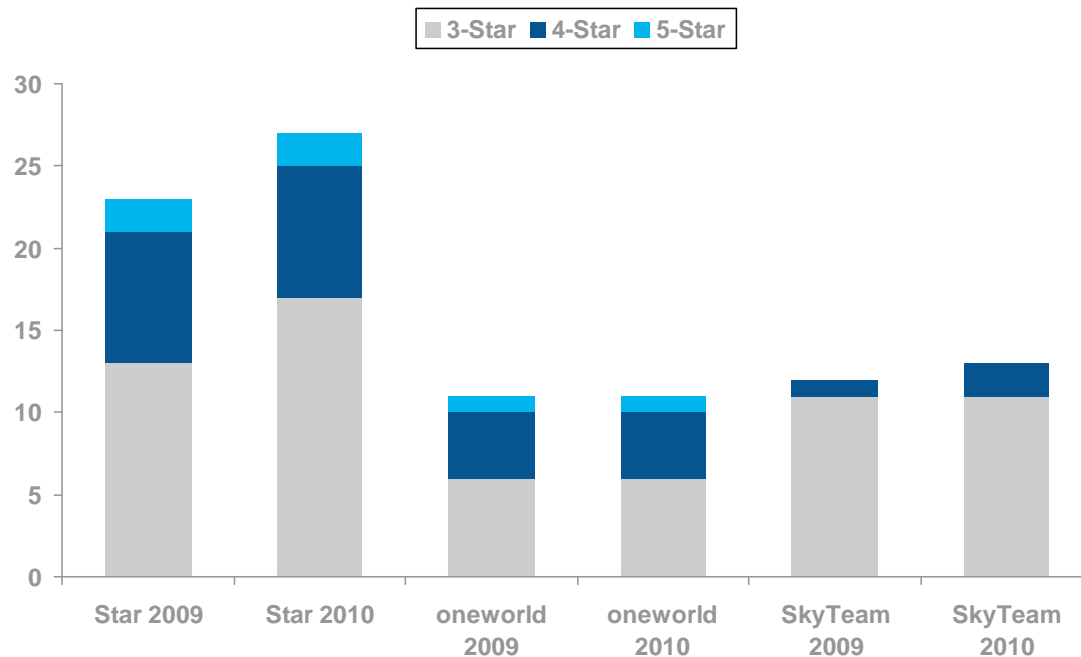
SKYTRAX

THE
PASSENGERS
CHOICE

Top 5

- ✧ Asiana Airlines
- ✧ Singapore Airlines
- 3. Qatar Airways
- 4. Cathay Pacific
- ✧ Air New Zealand

Alliance Member SkyTrax Ratings



	2009			2010		
	3-Star	4-Star	5-Star	3-Star	4-Star	5-Star
Star	13	8	2	17	8	2
oneworld	6	4	1	6	4	1
SkyTeam	11	1	0	11	2	0

Source: www.airlinequality.com SkyTrax Ratings as of November 2010

Star Alliance Has The Largest Number Of MuoR Projects



Leading in Business Facilities

First alliance branded lounge in 2001
followed by NGO, LAX, LHR, CDG, CAI.

Total 990+ lounges



First lounge project in LAX.
BA, CX, QF collaborated to build the facility

Total 440 lounges.



First alliance branded lounge at LHR
T4.

Total 550 lounges.



Market Leadership Recognized



„...Star Alliance has continued to set the pace as it enters its second decade , solidifying its brand and filling in the much discussed „white spots“ on its map with a couple of the most-sought after airlines on Earth...”

ATW FEB2008

- Over the years Star Alliance has earned a global positioning worth fighting for
- To keep our leadership, continuous attention is required

We Intend to Stay in the Lead



In Conclusion

Star Alliance is an Effective Partner

- Representing the expertise of multiple suppliers
- Growing with the Customers you represent
- Providing unique products that save time and money
- A collaborative approach to your issues



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Gracias

Obrigado

Thank You



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