

transavia.com highlights



- 43 years in the air
- 31 consecutive years of profitability!
- 100% daughter of Air France KLM Group
- Bases at Amsterdam (AMS), Rotterdam (RTM), Eindhoven (EIN), Paris Orly (ORY) and Copenhagen (CPH)
- More than 6 million passengers annually
- Hybrid carrier: charters, scheduled services, seat only & allotments
- 41 aircraft in service: young fleet of Boeing 737-700 & 800
- Online focus: 92% of sales via web. Rest via call centre, ticket desks, travel agents & Group department
- 'A la carte' concept for inflight service.
- Next to seats, online offering of travel related services, like hotels (Booking.com), car rental (Holiday Autos) and holiday apartments (Belvilla)

transavia.com to Valenciana (1/3)



ALICANTE

- Alicante is top destination for transavia.com since long time!
- Scheduled services from AMS, RTM & EIN.
- 26 departures per week to ALC in Summer; over 4.000 seats per week
- Around 205.000 passengers for Summer 2009
- Relative high proportion of 2nd home owners, pensionado's (winter), VFR: repeaters business!
- Tour operator share on route is around 14%.
- Comparable to Malaga (AGP) in many ways; size, development, importance for transavia.com.
- Missing link is flights from Copenhagen; too much competition!

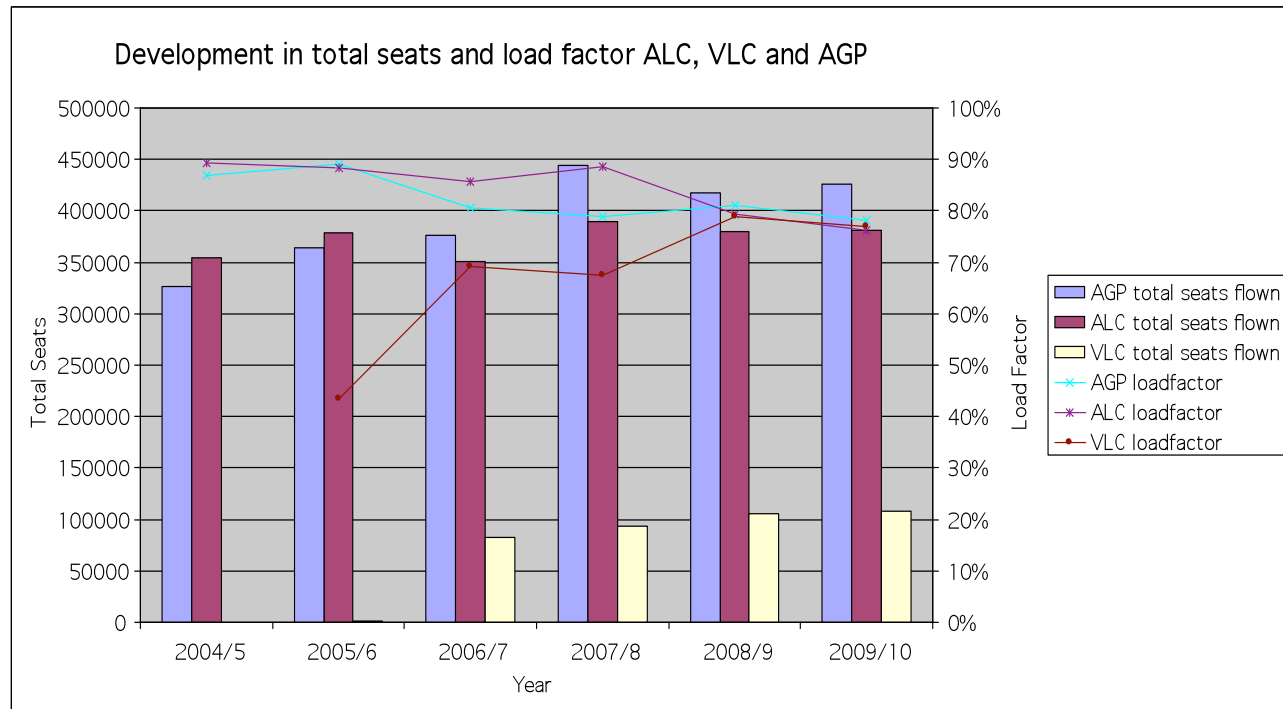
transavia.com to Valenciana (2/3)



VALENCIA

- Valencia is fastest growing destination, in mix of passengers & revenue for transavia.com
- AMS-VLC route is amongst 'happy few' that has shown YoY growth in 08/09.
- Started in March 2006.
- Daily flight from AMS this Summer
- Around 52.000 passengers for Summer 2009
- Tour operator share is 'only' around 5%
- City trippers, 2nd home owners, beach & active holidays
- Overlap with ALC market is little, due to total size and development of Valencia as city trip destination
- Valencia has grown its profile in Dutch market significantly, positioning itself as 'hot spot' for city trippers.

transavia.com to Valenciana (3/3)



Valencia

- Started in summer 2006
- Due to success increase in frequencies
- Load factor growth over the years

Alicante

- Total seats flown increased with its peak in the year 2007/8. Best load factor in the same year
- Performance Alicante and Malaga similar
- Alicante load factor started to decline, one reason could be Valencia

The partnership with Valenciana



- Mutually beneficial; more awareness, more passengers
- Partnership is about contacts (exchange of info), joint PR, joint events & creating synergies.
- Use of local marketing company in Netherlands is key: TMC has network, experience, enthusiasm and dedication to act local!
- Examples of partnership:
- Joint familiarisation trips for trade & press
- Sponsoring of local event for Dutch travel trade
- Showing of Valenciana commercial on inflight TV; high viewership!
- Joint effort on Sinterklaas-film, with great final result!

The future



- Consolidation on ALC; more flights to VLC? More tour operator activity on VLC route?
- Re-installment of CPH-ALC; introduction of CPH-VLC?
- More competition on routes not always a blessing for regions; lower margins can lead to loss of frequencies or services.
- Destination competition will remain; LCC penetration & growth of city marketing will broaden choice for customers
 - Spain-Spain, but also Spain-Europe & region-region (ie. Murcia..)
- Customer is online, spoiled and believes to “know it all”; visibility & inspiration are key factors!
- Partnerships with an European based airline create synergies and give you assurance of being where the potential customer is!

Questions!

