



Air Transport & Tourism Catalyst for the World's Economic Development

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Chief Executive Officer**





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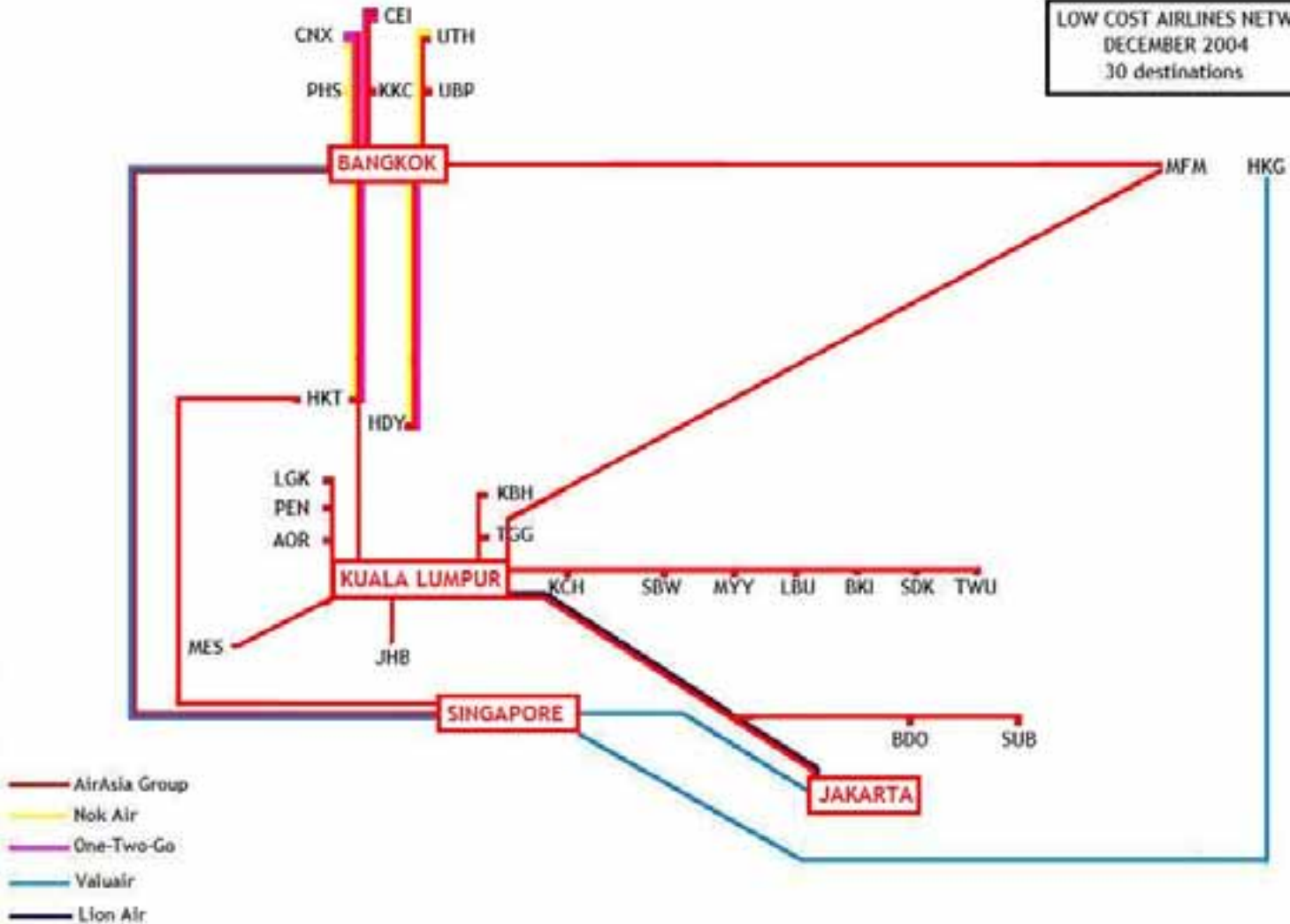


Low Cost Carriers



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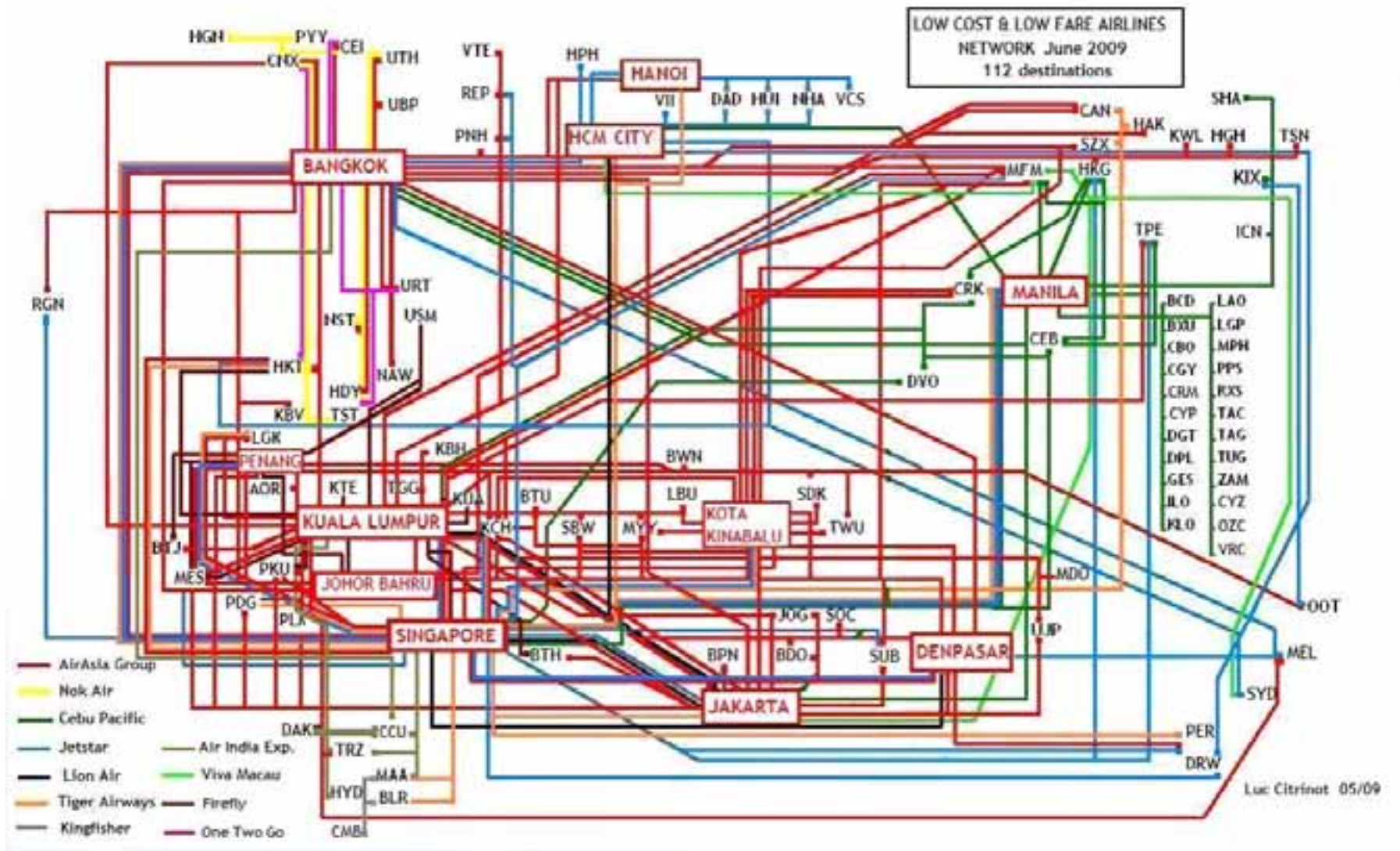
LOW COST AIRLINES NETWORK
 DECEMBER 2004
 30 destinations



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LC Consulting 01-07

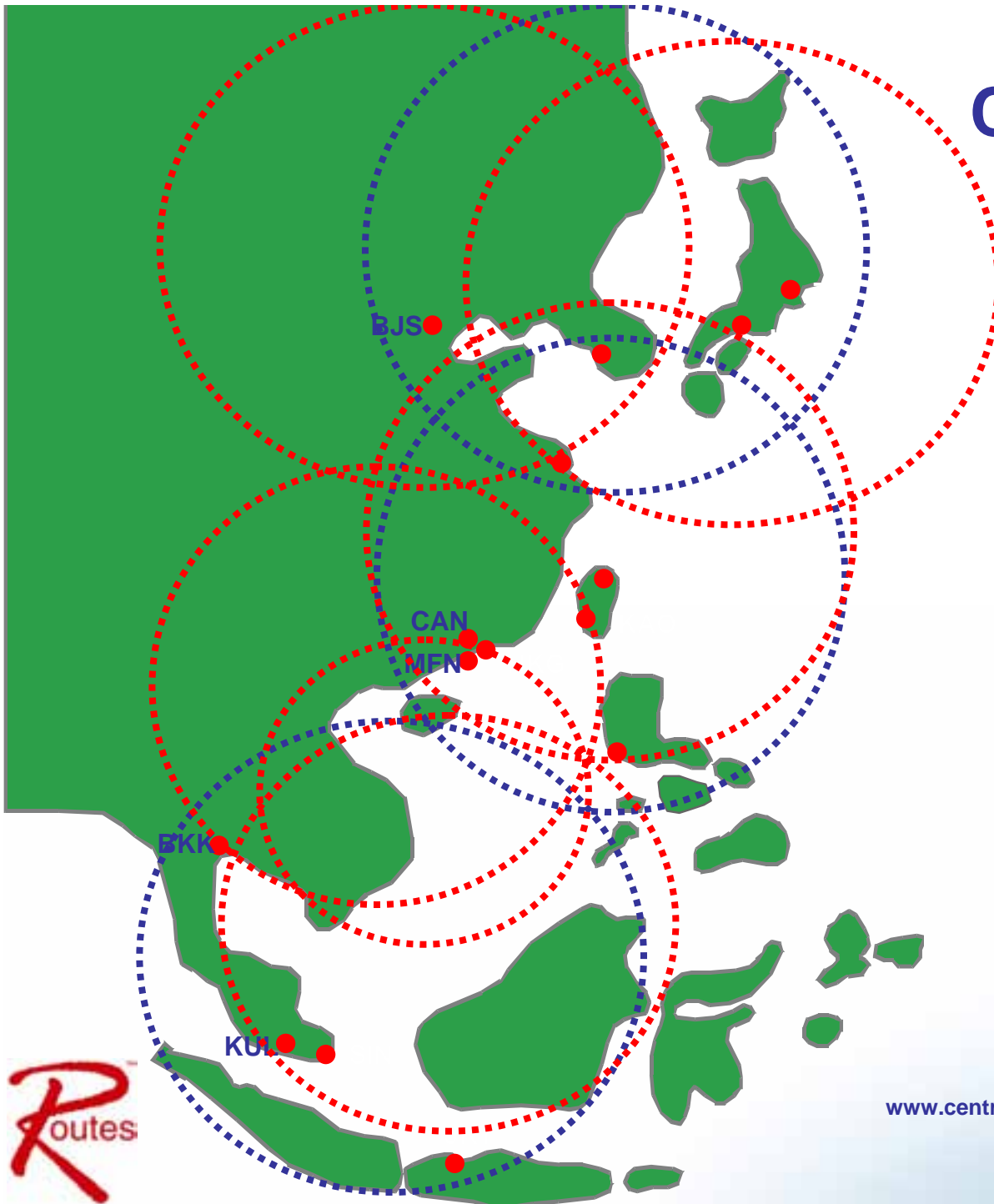




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Competing Hubs





AirAsia tames even the wildest tiger with low fares

Singapore to
Bangkok
from
S\$0.49 one way



5000 Seats. Book Now!
Travel period: 15 Sept - 15 Oct
Minimum 5 days advance booking

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Revenue Generation



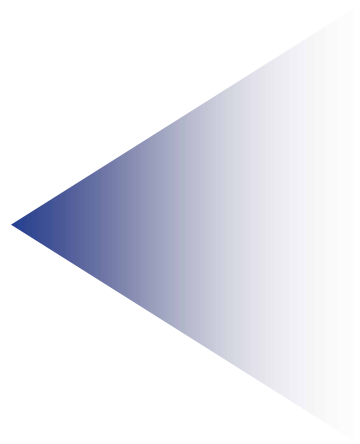
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Nok Air – Thailand



Tourism Targets

Tourism needs air capacity



Destination A



Destination B



Destination C

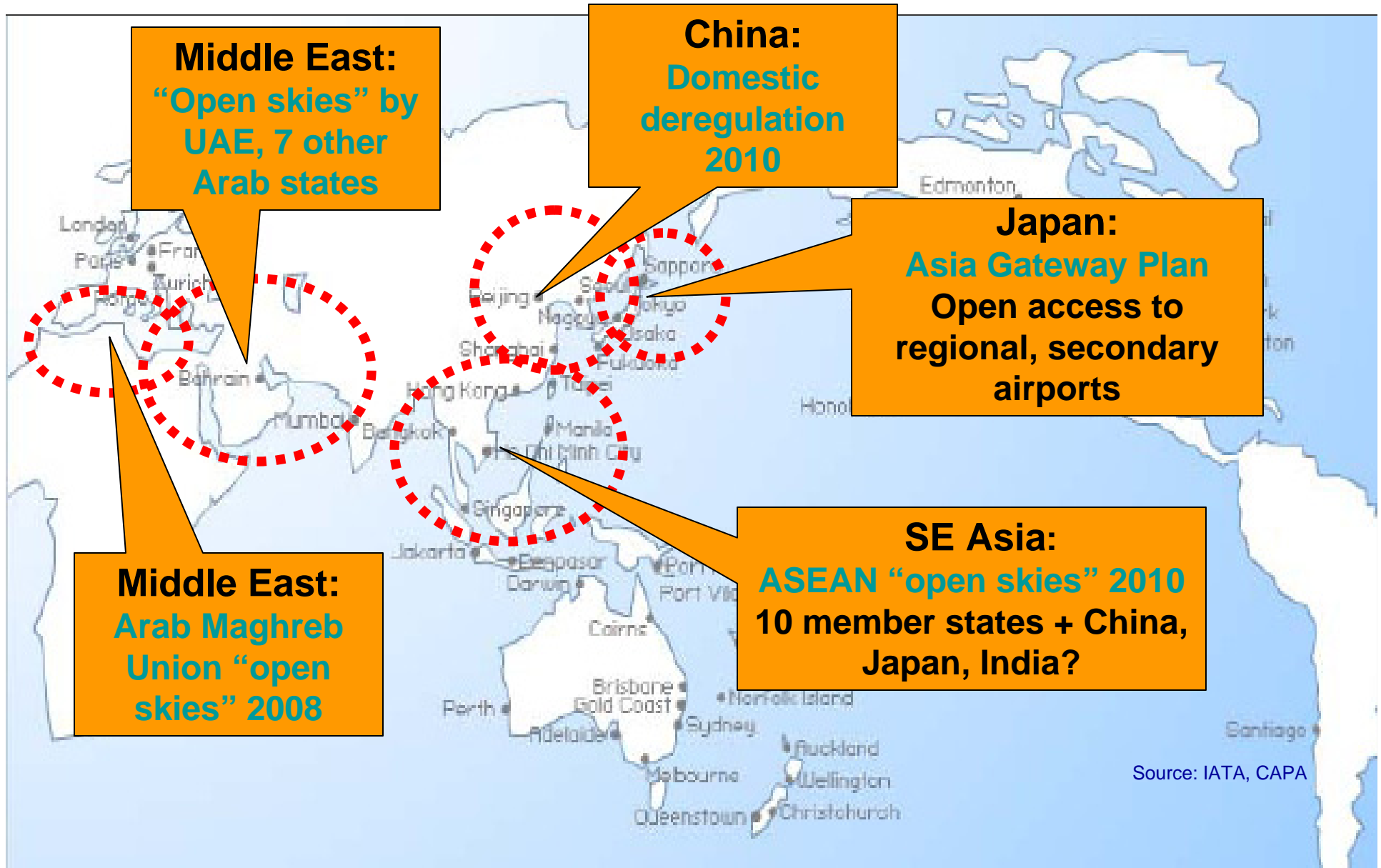
Tourist strategies are ambitious

- India wants 5 million new international tourists by 2010
This is the equivalent of 13,700 new daily tourists, or 40 new 747 flights/day
- Singapore is projecting 17 million tourists by 2015 (up from 11 million)
This equates to 16,500 new tourists/day, or 120 new daily A320 flights
- China expects visitor growth to expand by 7% annually
This equates to 19,400 new visitors per day next year, or 62 new daily A320 flights

All of these targets to be delivered whilst 15% of the World's air fleet is parked in the desert somewhere.



Asia and the Middle East poised to take leading roles in aviation liberalization



Source: IATA, CAPA

Barriers to Travel



Natural Disasters



Terrorism



Travel Delays



Carbon Footprints





Tourism

Direct Tourism Model

F&B
Transport
Hospitality
Entertainment
Gifts & Souvenirs
Retail – Duty Free

5-7% GDP

Indirect Tourism Model

F&B
Retail
Health
Insurance
Employment
Economic + FX
Manufactured goods
Supply Chain Services
Public Transport (MRT)
Public Services (Tourist Police)
Private Transport (Vans, Taxi, Car)

15-25% GDP



EMPLOYMENT



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