Proven: Competition is Additive

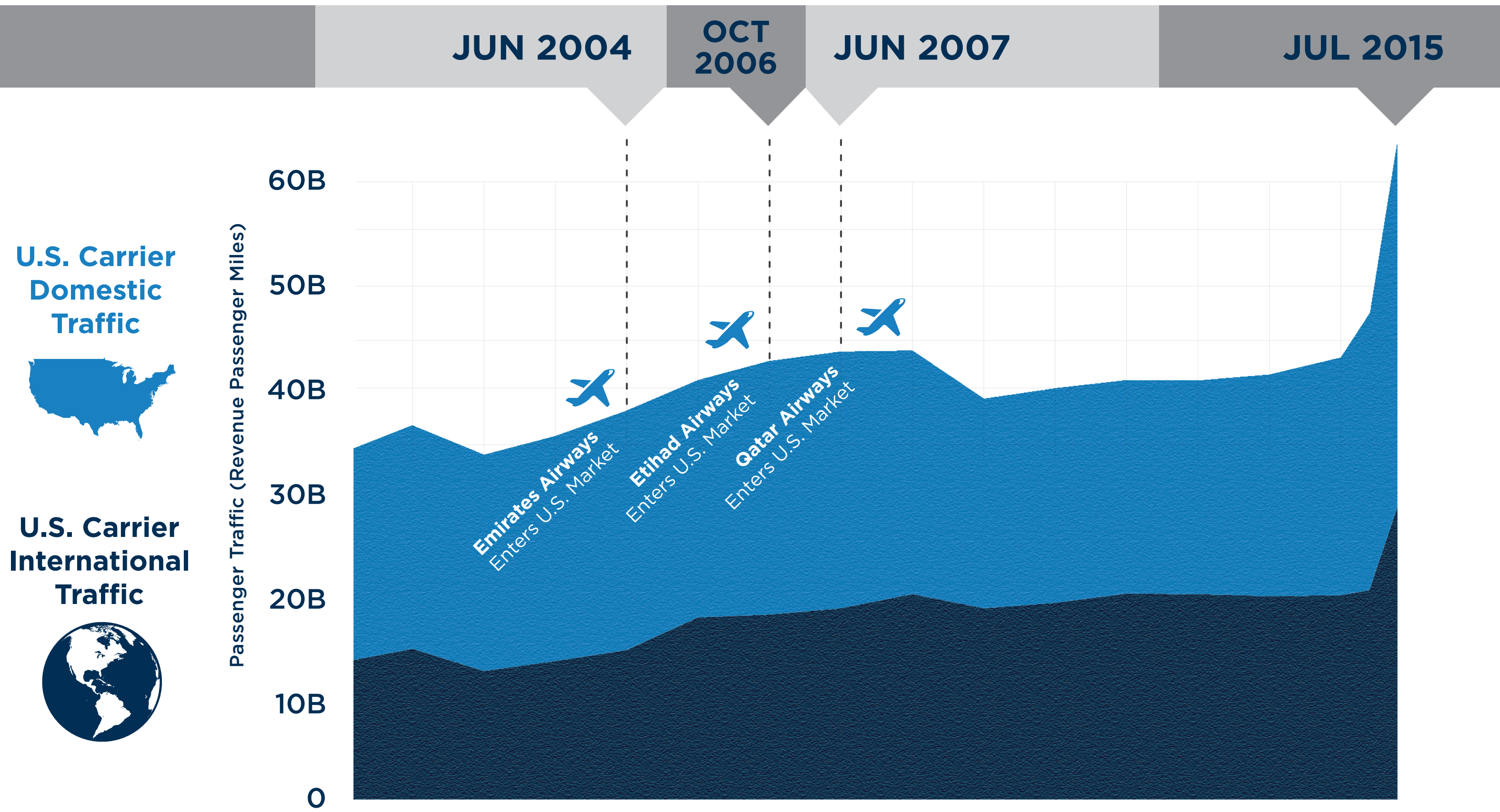
U.S. TRAVEL
ASSOCIATION

The U.S. legacy carriers allege that competition from Gulf carriers are harming American jobs and our economy. Our independent research proves the opposite. We urge leaders to protect Open Skies and reject protectionism.

- Competition adds American jobs
- Competition provides protection for consumers
- Competition grows the U.S. economy
- Competition even enriches the U.S. legacy carriers

FACT: AIRLINE COMPETITION HAS GROWN OUR ECONOMY

U.S. carriers have thrived since entry of Gulf carriers



Source: U.S. Department of Transportation, Bureau of Transportation Statistics, U.S. Air Carrier Traffic Statistics Through July 2015

By directly feeding U.S. airlines, the Gulf carriers generated

$140 MILLION

in passenger revenue for all U.S. airlines.

The Gulf carriers brought **1.1 MILLION** international visitors to the U.S.

Spending alone by these visitors supported nearly

50,000 American jobs.

Spending by these passengers generated

$1.1 BILLION

in federal, state and local taxes.

Protect Consumers. Protect Open Skies.

Proven: Competition is Additive (Cont.)

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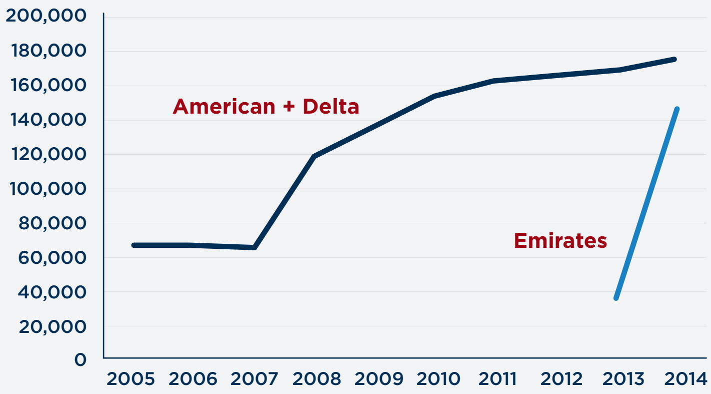
FURTHER, HEAD-TO-HEAD ROUTE COMPETITION YIELDS STEADY GROWTH FOR U.S. CARRIERS

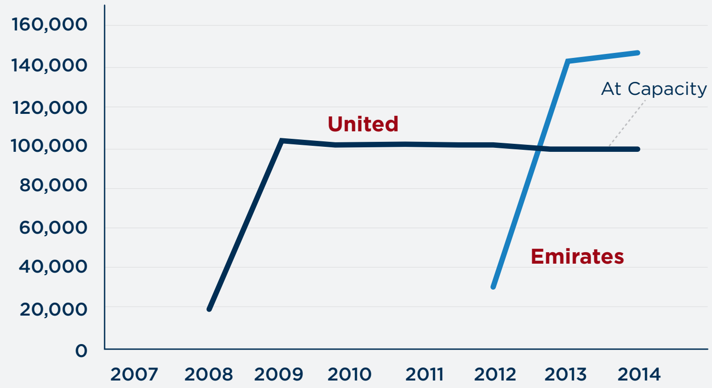
Milan (MXP) to New York (JFK) capacity trends, one-way seats



Source: Diio

American + Delta = ~160,000 passengers
American + Delta + Emirates = ~325,000 passengers

Dubai (DXB) to Washington (IAD) capacity trends, one-way seats



Source: Diio

United = ~100,000 passengers
United + Emirates = ~245,000 new passengers

There are only two routes – Milan (MXP) to New York (JFK), and Dubai (DXB) to Washington (IAD) – where the legacy carriers compete directly with the Gulf carriers. In both cases, the entrance of Emirates was additive and did not diminish the load factors of the U.S. carriers.

Even where direct competition exists, U.S. carriers have not been harmed by the Gulf carriers. Instead, they are at capacity or experiencing record growth.

70% of travelers think the U.S. government should not block foreign airlines from offering more flights.

Over the past decade, inbound travel from India **has increased by 211 percent.** Average visitor spending from India was roughly **$5,900 in 2014.**

Airfares are **32% lower on Open Skies routes,** saving travelers billions.

Protect Consumers. Protect Open Skies.