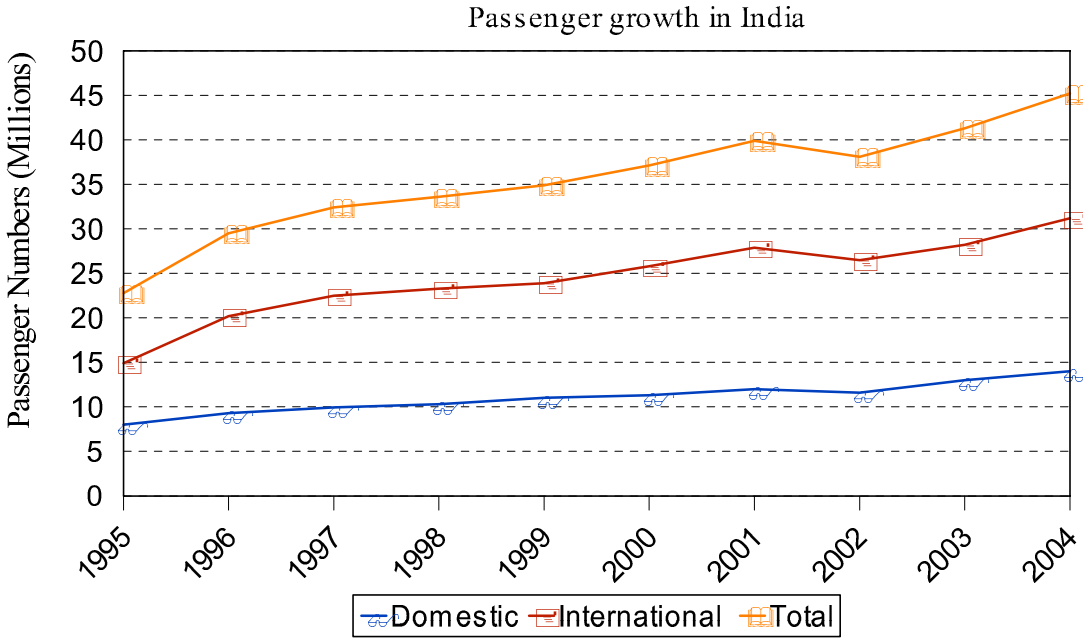
Journal of Air Transport Management, Volume 12, Issue 6, November 2006, Pages 358-374.

Figure 1



Source: Airports Authority of India

Figure 2

Question posed to Incumbents' passengers

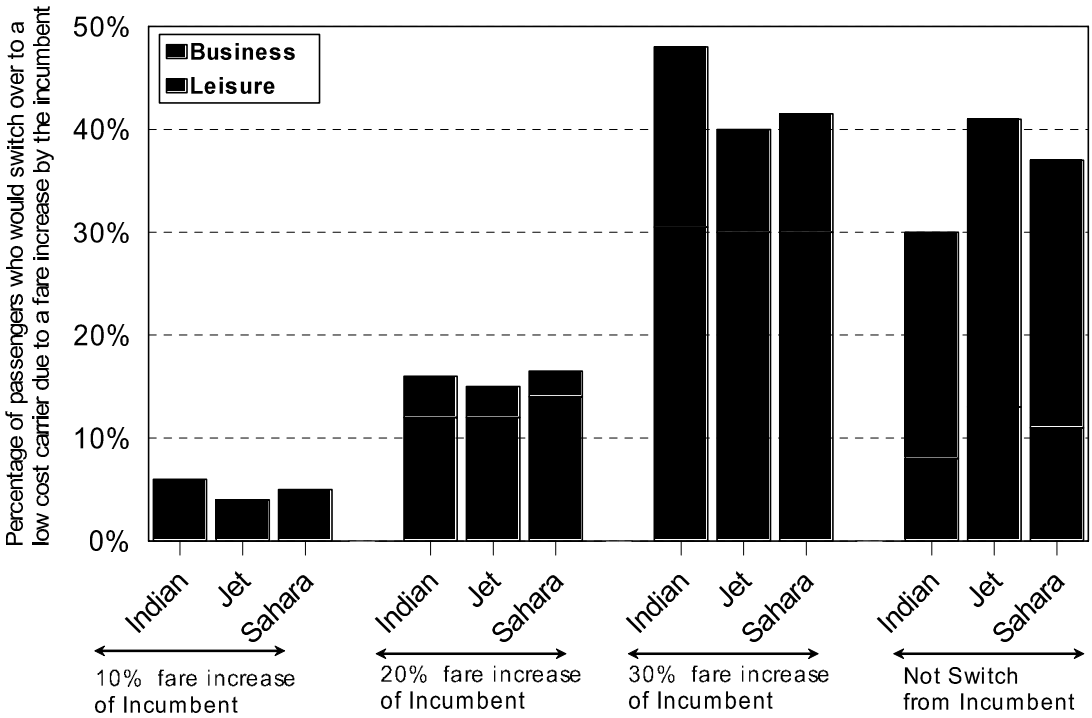
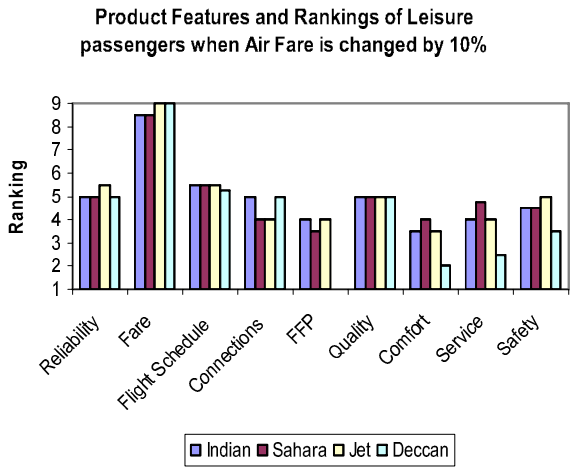
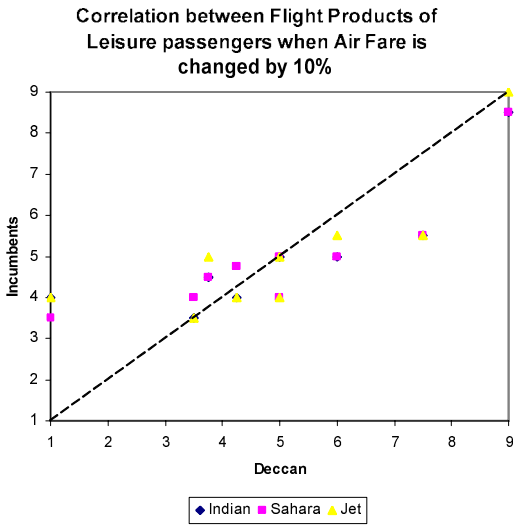


Figure 3



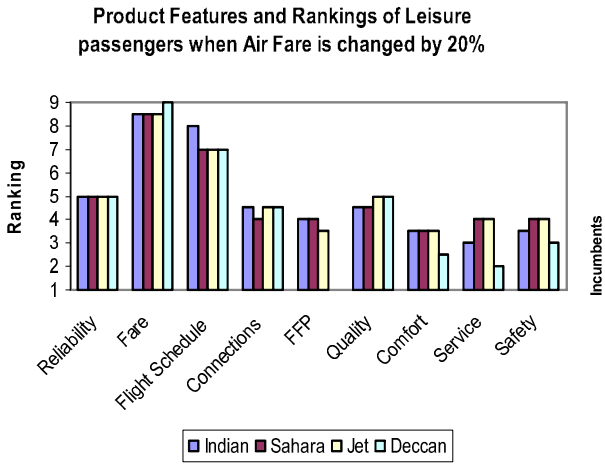


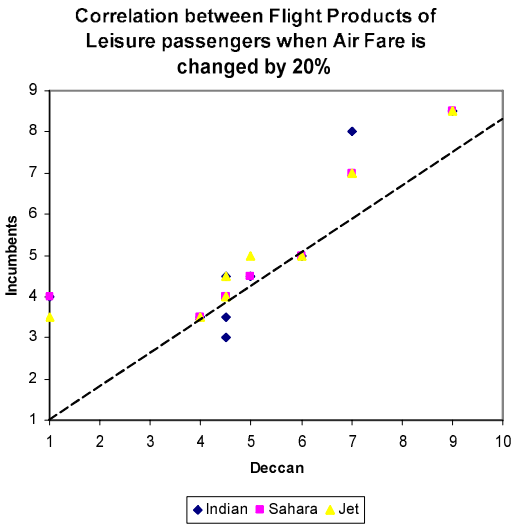
Correlation coefficient, Leisure Travellers, FI=10%

	IA-AS	IA-JA	IA-AD	AS-JA	AS-AD	JA-AD
Spearman's r_s	0.798**	0.873**	0.932**	0.871**	0.895**	0.837**
p	**0.009**	**0.002**	**<0.001**	**0.002**	**0.001**	**0.005**

** Correlation is significant at the 0.01 and 0.05 level (2-tailed).

Figure 4



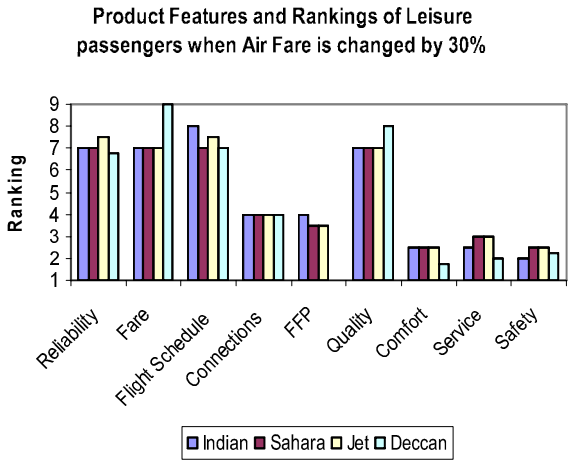


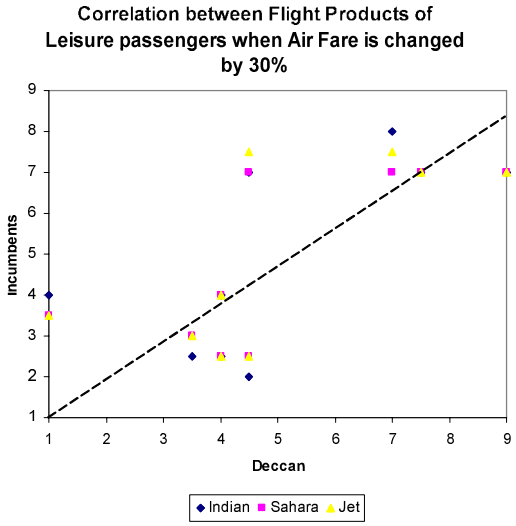
Correlation coefficient, Leisure Travellers, FI=20%

	IA-AS	IA-JA	IA-AD	AS-JA	AS-AD	JA-AD
Spearman's r_s	0.878**	0.864**	0.803**	0.939**	0.930**	0.979**
p	**0.002**	**0.003**	**0.009**	<**0.001**	<**0.001**	<**0.001**

** Correlation is significant at the 0.01 and 0.05 level (2-tailed).

Figure 5



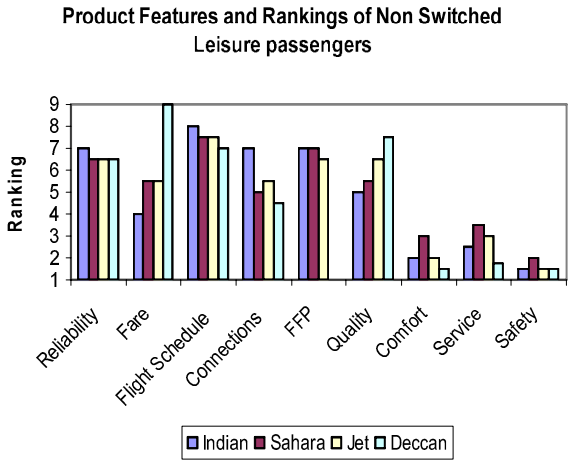


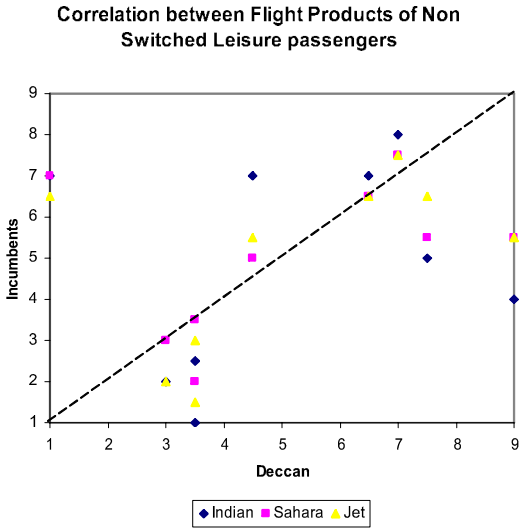
Correlation coefficient, Leisure Travellers, FI=30%

	IA-AS	IA-JA	IA-AD	AS-JA	AS-AD	JA-AD
Spearman's r_s	0.955**	0.957**	0.604	0.965**	0.657	0.557
p	**<0.001**	**<0.001**	0.085	**<0.001**	0.055	0.119

** Correlation is significant at the 0.01 and 0.05 level (2-tailed).

Figure 6



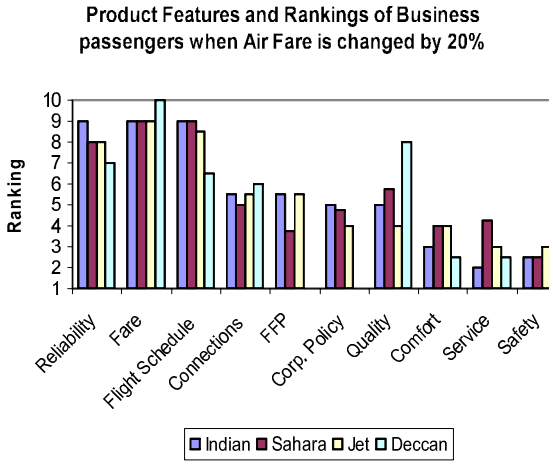


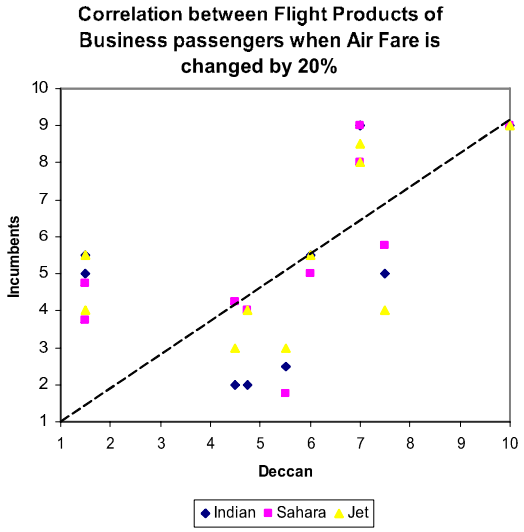
Correlation coefficient, Leisure Travellers, Non switched

	IA-AS	IA-JA	IA-AD	AS-JA	AS-AD	JA-AD
Spearman's r_s	0.894**	0.909**	0.272	0.962	0.328	0.410
p	**0.001**	**0.001**	0.478	**<0.001**	0.389	0.273

** Correlation is significant at the 0.01 and 0.05 level (2-tailed).

Figure 7



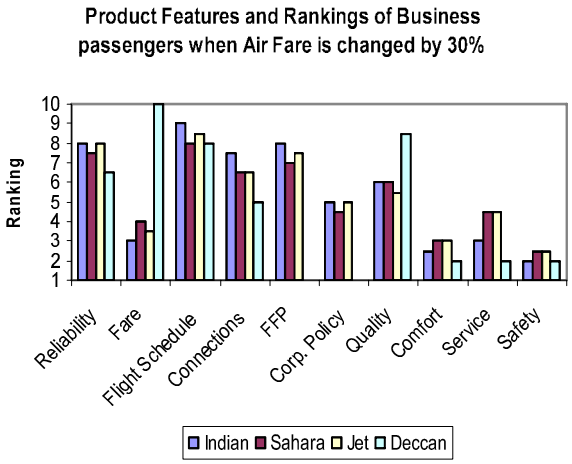


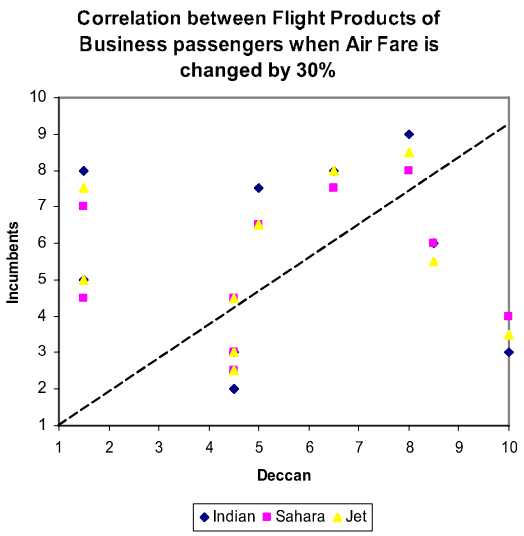
Correlation coefficient, Business Travellers, FI=20%

	IA-AS	IA-JA	IA-AD	AS-JA	AS-AD	JA-AD
Spearman's r_s	0.745*	0.931**	0.502	0.762*	0.659	0.567
p	**0.013**	**<0.001**	0.139	**0.011**	0.058	0.088

** Correlation is significant at the 0.01 and 0.05 level (2-tailed).

Figure 8



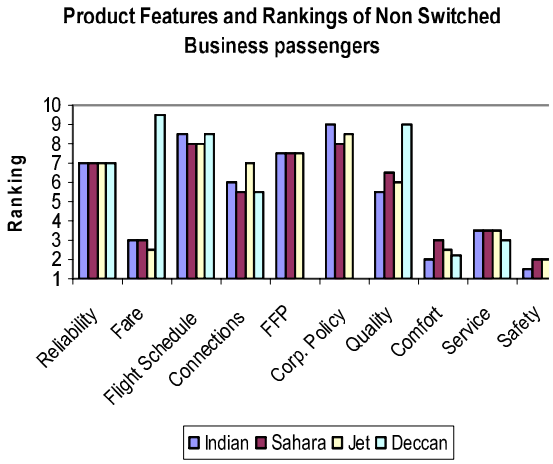


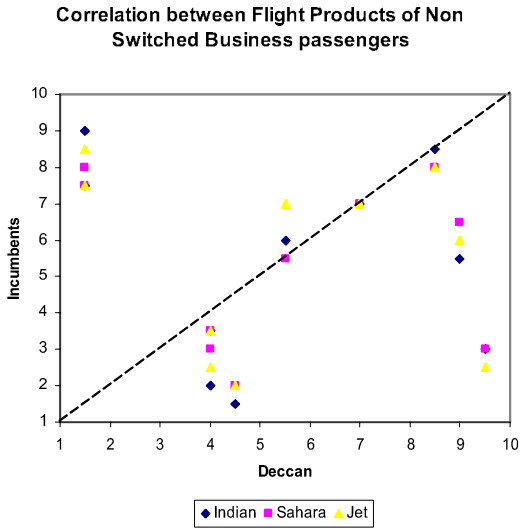
Correlation coefficient, Business Travellers, FI=30%

	IA-AS	IA-JA	IA-AD	AS-JA	AS-AD	JA-AD
Spearman's r_s	0.985**	0.991	0.028	0.997**	0.142	0.018
p	**<0.001**	**<0.001**	0.939	**<0.001**	0.695	0.961

** Correlation is significant at the 0.01 and 0.05 level (2-tailed).

Figure 9





Correlation coefficient, Business Travellers, Non switched

	IA-AS	IA-JA	IA-AD	AS-JA	AS-AD	JA-AD
Spearman's r_s	0.982**	0.994**	-0.119	0.975	-0.074	-0.142
p	**<0.001**	**<.001**	0.743	**<0.001**	0.840	0.696

** Correlation is significant at the 0.01 and 0.05 level (2-tailed).

Table 1

Indian Carriers: Performance Indicators (2004 data)

	Net Profit (US$M)	Passengers (millions)	No of Pax/ No. of Employees	Block Hours (per day)	Load Factor (%)	Passenger Yield (US cents)	Unit Cost (US cents)
Air India	19.5	3.8	244	9.0	73.3	9.2	9.4
Indian Airlines	10.0	6.9	369	8.8	60.5	12.7	12.3
Alliance Air	0.4	1.5	424	9.3	60.2	13.3	13.2
Jet Airways	37.0	8.1	1,213	9.5	63.0	13.1	11.7
Air Sahara	0.2	1.9	577	10.2	60.8	13.0	12.3
Air Deccan	0.1	1.4	4,895	13.1	61.9	7.1	5.6

Sources: DGCA, JP Morgan, ATI and Air Deccan

Table 2

Indian Start-up Airlines and existing Indian airlines' aircraft orders

Airline	Total Aircraft on Order	Fleet Details	Base	Establish Date
Air India	50	23 B777 27 B787	Mumbai	1932
Indian Airlines	43	A320	Hyderabad	1953
Air Sahara	17	B737	New Delhi	1991
Jet Airways	33	10 A330 10 B777 13 737s	Mumbai	1992
Jagson	14	A321	Delhi	1991
Air Deccan	99	30 ATR 72 6 ATR 42 63 A320	Bangalore	Aug. 2003
Indigo	100	A320	New Delhi	Mar 2005
Kingfisher Airlines	97	5 A380 5 A350 5 A340 5 A330 34 A320 5 A321 3 A319 35 ATR72	Bangalore	May 2005
SpiceJet	20	B737-800	New Delhi	May 2005
Air One	25	Embraer 145	Bangalore	May 2005
Go Air	20	A320	Mumbai	Oct. 2005
Air India Express	22	B737-800	New Delhi	Apr. 2005
Magic Airlines	10	A320	New Delhi	Early 2006
Paramount Airways	5	2 Embraer 170 3 Embraer 175	Coimbatore	Aug. 2005
Alliance Air	19	A319	New Delhi	Late 2006
Indus Air	5	Embraer 145	New Delhi	May 2005
East West	5	B737	Undisclosed	Late 2006
City Air	2	B737	Chennai	Late 2006

Sources: Centre for Asia Pacific Aviation, Aviation Strategy, Air Transport Intelligence, Companies as at May 1, 2006.

Table 5

Breakdown of the principle reasons why passengers choose each airline

Flight Products	Indian Airlines (n=248) %	Jet Airways (n=173) %	Air Sahara (n=165) %	Air Deccan (n=168) %
Flight Schedule	18.5	17.0	15.8	10.1
Reliability	15.2	18.1	16.4	-----
Quality	15.0	18.7	17.6	2.4
Connections	14.8	10.8	11.5	-----
Fare	11.2	13.2	14.5	87.5
FFP	10.7	8.1	7.9	-----
Company Policy	7.3	6.2	6.0	-----
Safety	3.2	2.6	3.0	-----
Service	2.4	3.2	4.3	-----
Comfort	1.7	2.1	3.0	-----

Table 3

Journey Purpose

Journey Purpose	*Air Deccan (n=167)*	*Indian Airlines (n=248)*	*Air Deccan-Indian Airlines*			*Jet Airways (n=173)*	*Air Deccan-Jet Airways*			*Air Sahara (n=165)*	*Air Deccan-Air Sahara*		
			Z	S_D	*P-value*		*Z*	S_D	*P-value*		*Z*	S_D	*P-value*
Business Reasons	%	%				%				%			
Meeting	15.0	26.7	2.97	0.04	**0.0029***	25.4	2.41	0.04	**0.0158***	27.9	2.90	0.04	**0.0037***
Conference	3.0	9.3	2.78	0.02	**0.0054***	8.7	2.26	0.03	**0.0235***	3.0	0.0	0.02	1.0
Training	10.2	4.4	2.16	0.03	**0.0304***	3.4	2.50	0.03	**0.0123***	5.4	1.64	0.03	0.10129
Trade Fair	-	0.3	-	-	-	0.7	-	-	-	-	-	-	-
Employment	3.0	2.4	0.37	0.02	0.7143	2.8	0.11	0.02	0.91254	3.6	0.31	0.02	0.75964
Total Business	31.2	43.1	2.50	0.05	**0.0125***	41.0	1.89	0.05	**0.0495***	39.9	1.66	0.05	0.09642
Non-Business Reasons													
Sports	7.6	-	-	-	-	-	-	-	-	-	-	-	-
Shopping	-	-	-	-	-	-	-	-	-	-	-	-	-
VFR	27.0	21.8	1.20	0.04	0.22888	21.7	1.14	0.05	0.25439	22.0	1.06	0.05	0.28863
Weekend Break	10,2	9,0	0,40	0,03	0,68561	9,1	0,34	0,03	0,73136	9,9	0,09	0,03	0,92757
Holiday	17.2	20.3	0.80	0.04	0.42427	19.5	0.55	0.04	0.58354	22.8	1.28	0.04	0.20119
Cultural/Religious	3.2	2.9	0.17	0.02	0.86227	8.7	2.17	0.03	**0.0302***	4.2	0.48	0.02	0.62937
Study	3.6	2.9	0.39	0.02	0.69618	-	-	-	-	1.2	1.44	0.02	0.15125
Total Non business	68.8	56.9	2.50	0.05	**0.0125***	59.0	1.89	0.05	0.05852	60.1	1.66	0.05	0.09642

* Statistically significant results ($p < \alpha$) at the significance level $\alpha=0.05$.

Table 4

Daily Flight Frequencies and average return fares (Indian Rupees) paid by surveyed passengers.

	Air Deccan		Indian Airlines		Jet Airways		Air Sahara	
	Freq	Av. Fare	Freq	Av. Fare	Freq	Av. Fare	Freq	Av. Fare
Mumbai-Ahmedabad	2	3158	3	4206	4	4085	2	3874
Mumbai-Aurangabad	1	2210	1	2945	2	2685	----	----
Mumbai-Bangalore	2	5640	5	7410	8	7050	3	6192
Mumbai-Belgaum	1	6100	---	----	----	----	----	----
Mumbai-Bhavnagar	1	5150	1	6595	1	6245	----	----
Mumbai-Bhubaneshwar	---	----	1	9110	----	----	----	-----
Mumbai-Bhuj	----	----	----	----	1	8762	----	----
Mumbai-Chennai	1	5120	4	6672	6	6716	2	5922
Mumbai-Coimbatore	1	5085	1	6535	2	6653	1	6702
Mumbai-Delhi	4	5192	11	6464	11	6388	6	6220
Mumbai-Goa	2	4124	4	5026	4	4894	1	4710
Mumbai-Hyderabad	1	4298	3	5628	4	5350	2	5145
Mumbai-Indore*	----	----	2	6997	2	6348	----	----
Mumbai-Jaipur*	----	----	2	6600	2	6680	----	----
Mumbai-Jamnager*	----	----	1	9222	----	----	----	----
Mumbai-Kochi	----	----	----	----	2	8990	----	----
Mumbai-Kolhapur	1	6109	----	----	----	----	----	----
Mumbai-Kolkata	2	4212	3	5470	5	5392	3	5368
Mumbai-Lucknow	----	----	1	7738	1	7600	3	7740
Mumbai-Manglore*			1	7220	1	6897	----	----
Mumbai-Nagpur	1	3980	2	5230	2	5102	----	----
Mumbai-Nashik	1	6122	----	----	----	----	----	----
Mumbai-Patna	----	----	----	----	----	----	2	8590
Mumbai-Pune	1	2710	1	3212	2	3105	----	----
Mumbai-Raipur	----	----	1	7202	1	6470	----	----
Mumbai-Rajkot*	1	5740	----	----	2	7330	----	----
Mumbai-Surat	1	6235	----	----	----	----	----	----
Mumbai-Trivandrum	----	----	1	7690	1	6593	----	----
Mumbai-Udaipur*	----	----	1	6990	2	6920	-----	----
Mumbai-Vadodara	1	3850	1	4720	3	5070	----	----

* Indian Airlines subsidiary Alliance Air operates on this route. 1 Rupee = $0.02 cents Natwest Bank, London October 28th 2005. The fare includes taxes, which constitute 422 Rupees per return journey.

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Transformation of India's Domestic Airlines: A case study of Indian Airlines, Jet Airways, Air Sahara and Air Deccan

O'Connell, John F.; Williams, George

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