

## North America July - September 2005 Estimate\*



### Passenger Numbers by Route (millions)

	Apr-Jun '05	Apr-Jun '04	% change	Jul-Sep '04	Estimate
Domestic	171.84	164.15	4.69%	165.15	172.90
International	42.16	34.96	20.61%	37.97	45.80
Total	214.00	199.10	7.48%	203.12	218.32

Both domestic and international passenger numbers continue to grow; this is in part due to Easter falling in April rather than in March as in 2004. However, the estimated passenger numbers for quarter three may be somewhat high due to the events in London in July 2005. As the terrorist acts occurred on the underground and on buses, it would be expected that there would be slight dip in passenger numbers for the third quarter of 2005 but that these numbers would recover by the fourth quarter.

### Passenger Numbers by Seat Class (millions)

	Apr-Jun '05	Apr-Jun '04	% change	Jul-Sep '04	Estimate
First	16.14	14.93	8.10%	15.23	16.47
Business	6.08	5.58	9.13%	5.69	6.20
Coach	191.78	178.60	7.38%	182.20	195.65

As passenger numbers increase compared to last year, so too does the uptake of first and business class seats. What is perhaps interesting to note is that for the first time in 2005, the percentage change on last year, of passengers choosing first and business class seats is higher than that of coach passengers.

### Estimated Complimentary Meal Numbers and Type by Route (millions)

	Apr-Jun '05	Apr-Jun '04	% change	Jul-Sep '04	Estimate
Domestic					
Snack	102.41	97.83	4.69%	98.43	103.05
Breakfast	13.40	12.80	4.69%	12.88	13.49
Lunch/Dinner	43.13	41.20	4.69%	41.45	43.40
International					
Snack/Breakfast	33.65	27.90	20.61%	30.30	36.55
Lunch/Dinner	33.52	27.79	20.61%	30.19	36.41

Delta expanded their buy-on-board snack selections from April 2005 and this begins to explain why the percentage difference between the 2005 and 2004 figures is lower than in the previous two quarters.

### Passenger Numbers by Carrier (millions)

	Apr-Jun '05	Apr-Jun '04	% change	Jul-Sep '04	Estimate
American	25.43	23.47	8%	23.73	25.72
Continental	10.93	10.52	4%	10.61	11.03
Delta	23.09	22.68	2%	22.26	22.62
North West	15.15	13.84	9%	14.33	15.69
United	17.14	18.12	-5%	19.02	18.00
US Air	11.58	11.20	3%	10.77	11.13
Southwest	22.79	21.64	5%	21.11	22.23
Others	87.89	77.63	13%	81.33	92.08

United was the only airline in this quarter to see a drop in passenger numbers. This is in part due to the reallocation of their aircraft capacity to international markets and further optimization of their domestic schedule.

## Current Headlines

### Continental

From November, 2005, Continental Airlines will be the first US carrier with scheduled non-stop daily services between the US and India. The flights, between Continental's hub at Newark Liberty International Airport and Delhi's Indira Gandhi International will utilise a 283-seat 777-200ER.

### USA

Domestic routes were cut by 2% in third quarter 2005, but 4,000 additional international flights were added by American carriers, according to OAG.

### Chapter 11

In October, North West Airlines, the world's fourth largest airline, and Delta Air Lines, the third largest, both filed for bankruptcy under Chapter 11

## **Explanations**

*\* The North American Report is classed as an estimate rather than a forecast because of the time lag in receiving data. There is a three month delay in domestic passenger data being inputted into the Intermodal Transportation Database and a four month delay for international numbers.*

### **Passenger Numbers by Route**

*The data in this table is derived from the Intermodal Transportation Database available on the Bureau of Transportation Statistics website.*

*% change - This compares the last full quarter of this year with the same quarter in the previous year.*

*Estimate - The estimate is based on the trend derived from the equivalent quarter of the previous year and the percentage change in the last full quarter.*

### **Passenger Numbers by Seat Class**

*The data in this table is derived from data found on Euromonitor's web pages. The seat class data is defined by country and is then applied to the major carrier for that country.*

### **Estimated Complimentary Meal Numbers and Type by Route**

*The data in this table is calculated by taking the total passenger numbers by route and applying a formula to provide an estimate of the types of meals provided to passengers. This figure is then manipulated to consider the take up of this particular meal type (i.e. snack, breakfast, lunch or dinner) by passengers (based on load factor data). The formulae used to arrive at these figures are based upon consensus meal values agreed upon by a panel of experts. In the future these formulae will be subject to change on a monthly basis.*

*% change – Please see above.*

*Estimate – Please see above.*

### **Passenger Numbers by Carrier**

*The data in this table is derived from the Intermodal Transportation Database available on the Bureau of Transportation Statistics website. Southwest Airlines is the only major carrier specified whose passenger numbers are for domestic (intra-continental) flights only.*

*The 'Others' category includes passenger numbers from other US based airlines such as Alaska Airlines and American Eagle Airlines as well as including all international carriers who have routes into/within and from the USA.*

*% change – Please see above.*

*Estimate – Please see above.*