

## North America

### October - December 2005 Estimate\*



#### Passenger Numbers by Route (millions)

	Jul-Sept '05	Jul-Sept '04	% change	Oct-Dec '04	Estimate
Domestic	172.34	165.15	4.35%	156.20	162.99
International	44.45	37.97	17.07%	32.87	38.49
Total	216.79	203.17	6.73%	189.07	201.79

After a slight slowdown in growth for the third quarter of 2005, both domestic and international passenger most likely due to a regaining in confidence following the terrorist acts in London July 2005.

#### Passenger Numbers by Seat Class (millions)

	Jul-Sept '05	Jul-Sept '04	% change	Oct-Dec '04	Estimate
First	16.37	15.23	7%	14.18	15.21
Business	6.15	5.69	8%	5.29	5.72
Coach	194.31	182.20	7%	169.59	180.86

Meal numbers reflect trends in passenger numbers. The proportion of premium class passengers has slightly increased compared to the previous quarter. The estimate for the fourth quarter figures dip slightly when compared to the third quarter of 2005.

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

	Jul-Sept '05	Jul-Sept '04	% change	Oct-Dec '04	Estimate
Domestic					
Snack	102.71	98.43	4.35%	93.09	97.14
Breakfast	13.44	12.88	4.35%	12.83	12.713
Lunch/Dinner	43.26	41.45	4.35%	39.21	40.91
International					
Snack/Breakfast	35.47	30.30	17.07%	26.23	30.71
Lunch/Dinner	35.34	30.19	17.07%	26.13	30.59

International traffic travel remained strong in this quarter, up 17% on the same quarter in 2004. Domestic traffic has slightly grown compared to the previous quarter.

#### Passenger Numbers by Carrier (millions)

	Jul-Sept '05	Jul-Sept '04	% change	Oct-Dec '04	Estimate
American	25.80	23.73	8.71%	22.57	24.53
Continental	11.07	10.61	4.27%	10.73	10.56
Delta	22.31	22.22	0.42%	21.70	21.78
North West	14.98	14.33	4.65%	13.32	13.93
United	17.48	19.02	-8.13%	16.84	15.48
US Air	10.62	10.77	-1.40%	10.60	10.47
Southwest	23.60	21.11	11.76%	20.16	22.54
Others	90.94	81.33	11.82%	73.74	82.47

United Airlines has seen the highest fall in passenger numbers compared to the previous year. Southwest has seen the highest growth in numbers due to continued growth in the domestic market.

## Current Headlines

### Air Canada

Air Canada has scrapped complimentary meals on its long-haul flights within Canada and the continental USA. Instead of free breakfast, lunch and dinner service, Air Canada is now charging CAD 5 for a selection of snacks and cold sandwiches. Air Canada had eliminated hot meals on many of its short haul North American routes as it struggled financially in 2003. But its user-pay Onboard Café programme has been expanded to include all Economy Class seats (sometimes called Hospitality Class) on flights lasting more than 90 minutes in Canada and the continental USA.

#773.CAT14

### Delta Airlines

Delta Airlines continued announcing that it has added several new service routes.

- non-stop service between its hub in Atlanta and the Atlantic City International Airport. Effective June 8, Delta Connection carrier Atlantic Southeast Airlines will offer customers one daily round-trip flight between the two cities.
- non-Stop Service Between Boston and Savannah
- non-Stop Service Between Raleigh/Durham, Los Angeles effective June 8 with one roundtrip flight operated with the 150-seat Boeing 737-800 aircraft.
- non-stop flights between the East Coast and Midwest. Effective from late May through early September 2006, Delta will offer customers in Bloomington, Ill., Moline, Ill., Rochester, N.Y., Newport News/Williamsburg, Va., and Wichita, Kan., new non-stop, round-trip flights to Orlando International Airport, complementing existing connecting service between these cities and Orlando via Delta's hubs.
- daily non-stop service between JFK and South America's largest city, Sao Paulo, Brazil, effective June 1, 2006.

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### American Airlines

American Airlines has unveiled new first class and business class menus on all transcontinental flights and select flights from Brazil. It is AA's first menu revamp since 1999 and is designed to give it "a competitive advantage" over LCCs and help it "compete effectively" with international carriers. Separately, AA signed a deal with Lenovo to provide Admirals Club members access to Lenovo personal computers. IBM will provide deployment services.

<http://www.atwonline.com/news/topic.html>, 06/02/06

### Northwest Airlines

As part of its overall co-cutting plan, Northwest Airlines is the last U.S. airline to end its policy of providing free drinks to passengers in international Economy Class on flights to and from Asia with effect from 01, February, 2006.

#778.CAT18

## **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.*