

**Regional Aviation Data Bank**

## RJs Get Credit For Resurgence At Top Airports

At the nation’s busiest airports, commercial flight departures have returned to the high mark established in 2000 – and the rise of the regional jet (RJ) gets the credit, according to data tracked by **BACK Aviation Solutions**.

All departures at the nation’s busiest airports in the fourth quarter of 2004 are projected to finally recover and collectively exceeded fourth quarter 2000 data, said John Weber, a BACK Aviation vice president and analyst. “We are back in a growth mode.”

The five busiest airports – Chicago O’Hare International Airport, Atlanta Hartsfield-Jackson International Airport, Dallas-Fort Worth International Airport, Los Angeles International Airport and Washington Dulles International Airport – account for 16.5 percent of all scheduled departures in the U.S. this quarter. However, when the operations for all airports are tallied, Weber said the industry’s departures have not reached the high point set in 2000. There are 1.3 million departures scheduled for the

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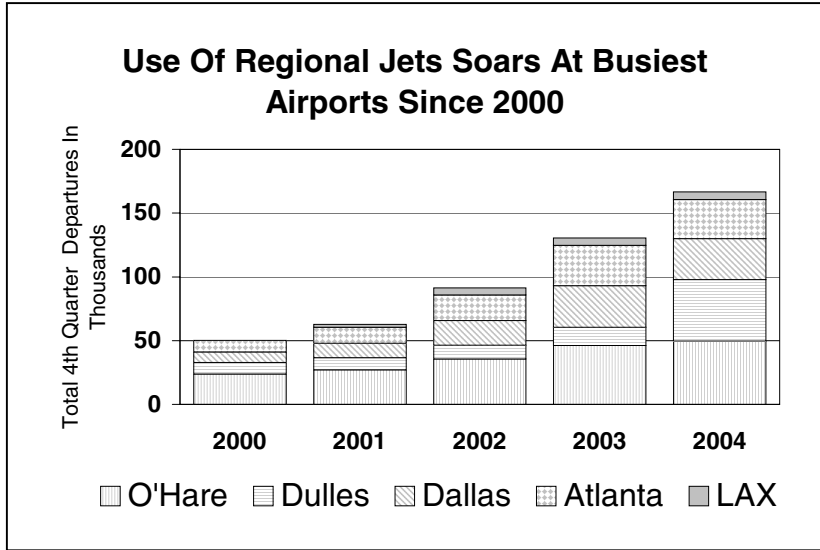
Top Regional Carriers At The Top Five U.S. Airports			
Airport	Regional Departures	Largest Regional Carrier	Market Share
1. Chicago O’Hare	41.5%	American Eagle	17.9%
2. Atlanta	31%	Atlantic Southeast	22.5%
3. Dallas-Fort Worth	39.7%	American Eagle	21.6%
4. Los Angeles International	26.5%	SkyWest	16.7%
5. Washington Dulles	76.7%	Independence Air	39.5%

Notes: Airports ranked by total departures. Regional departures include both regional jets and turboprops. Market share based on scheduled fourth quarter 2004 departures.

Fleets Of Regional Carriers Serving Top Five Busiest Airports							
Airline	Aircraft	Stored	On Lease	Own	Leased	Total	On Order
<b>American Eagle Airlines</b> <i>Total fleet: 286</i>	Saab 340B		0	10	18	28	0
	Saab 340B	Y	0	37	23	60	0
	CRJ 701		0	25	0	25	0
	ERJ 135LR		0	39	0	39	0
	ERJ 140		0	59	0	59	0
	ERJ 145		10	75	0	75	51
<b>Atlantic Southeast Airlines</b> <i>Total fleet: 162</i>	CRJ 100/200		0	49	43	92	27
	ATR 72-100/200		0	4	15	19	0
	Embraer 120 Brasilia	Y	0	26	0	26	0
	CRJ 701		0	25	0	25	5
<b>Independence Air</b> <i>Total fleet: 151</i>	BAe Jetstream 41	Y	0	5	25	30	0
	A319-100		0	0	1	1	26
	CRJ 100/200		0	12	75	87	34
	Dornier 328Jet		0	1	32	33	0
<b>Skywest Airlines</b> <i>Total fleet: 212</i>	Embraer 120 Brasilia		0	21	59	80	0
	CRJ 100/200		0	33	88	121	5
	CRJ 701		0	0	7	7	25
	Embraer 120 Brasilia	Y	0	0	4	4	0

Fleets as of Oct. 3, 2004

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last three months of this year compared to 1.7 million departures, which took place in the same period of 2000. The gap continues because the airlines are still shifting flights from smaller airports to larger ones, he noted.

The growth of the RJ best illustrates the growth at Dulles and O'Hare while, at the same time, RJ traffic sustained Dallas as mainline flights were dramatically scaled back.

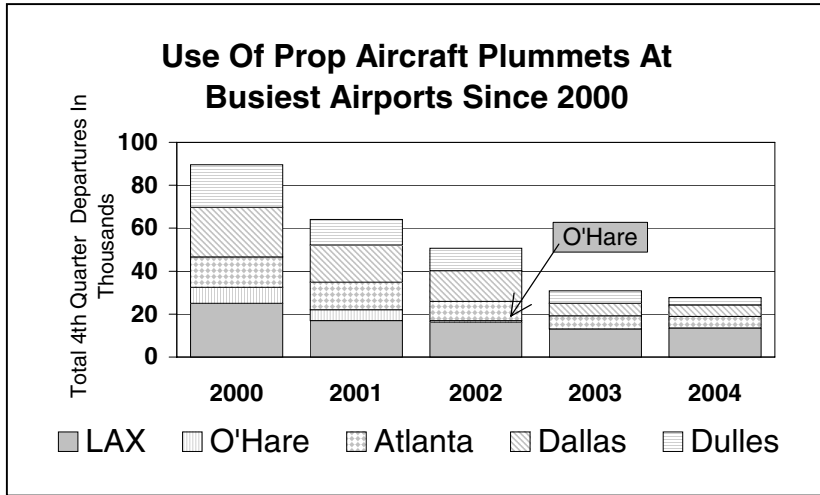
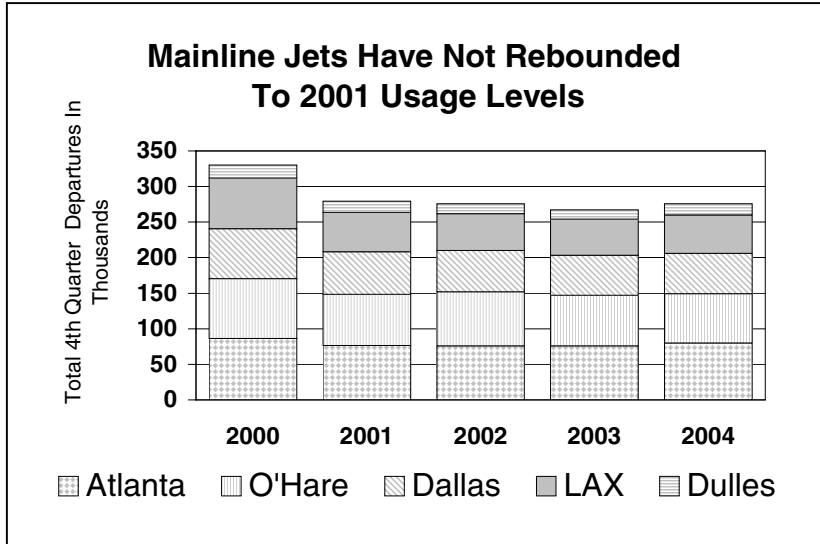
Dulles has by far the greatest growth. This year in the fourth quarter there are 68,000 departures scheduled compared to 47,000 departures in the fourth quarter of 2000. Regional aircraft – both RJs and prop-powered planes – account for 76.7 percent of the fourth quarter schedule at Dulles, according to BACK data.

“The big change there was when **Atlantic Coast Airlines (ACA)** decided it was not willing to take a penalty for **United Airlines' [UALAQ]** bankruptcy and decided to go independent,” Weber said.

When ACA was flying as **United Express** earlier in the year it had 120 daily flights, said BACK analyst Tulinda Larsen. Flying now as **Independence Air [FLYI]**, it has 300 daily departures. Furthermore, United has continued to fly to most of its former markets. Competitors, such as **Delta Air Lines [DAL]**, have added more flights from Dulles to Atlanta.

Overall, United is scheduled to fly 6,912 flights this quarter, fewer than the 9,451 it flew in the fourth quarter 2000. Weber added. It should be noted that United is now approaching its second anniversary in bankruptcy.

At O'Hare, the RJ has been blamed for much of the congestion at that hub airport. Regional carriers will fly 41.5 percent of the fourth quarter departures. The **Regional Airline Association** and others disagree that the RJs are the cause.



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While United Express flies more flights through O’Hare, it uses five carriers. The United Express livery will be on more than 25,400 flights this quarter. **Air Wisconsin** is the largest United Express carrier at O’Hare with more than 15,300 flights followed by **SkyWest Airlines** [SKYW], 6,417; **Trans States**, 1,795; **Mesa Air** [MESA], 1,070; and **Chautauqua Airlines**, 835.

**American Eagle** is the single largest regional carrier. It will fly more than 21,000 flights this quarter.

While RJ traffic has grown significantly since 2000, the role of the prop-driven aircraft has declined even more dramatically. O’Hare may be the best example of this pattern in the extreme, said BACK analyst Frederick Roe. For the last two years, not one prop plane has departed O’Hare on a scheduled commercial flight.

Overall operations have fallen at Dallas, Weber said. In the final quarter of 2000, there were 101,000 departures. This year there will be 95,000. American Eagle’s 20,482 departures this quarter will amount to 21.6 percent of all departures.

However, the Dallas story is not American Eagle, but Delta. Last year in the fourth quarter, Delta flew more than 24,000 departures. This year it will fly 18,800 departures – nearly the same number as in 2000. RJs are flying a larger percentage of the flights. A year ago, RJs flew 19,000 departures in the fourth quarter. This year, RJs will fly more than 14,000 departures. Next year will be a different story as Delta will no longer use Dallas-Fort Worth as hub center, shifting all RJ flights to other cities and maintaining 21 daily mainline routes from its remaining three hubs to service Dallas destination traffic.

The RJs have made their shallowest penetration in the LAX market. As overall operations remain down from 2000 levels – 96,000 in 2000 and 74,000 expected this quarter – the regional jet will be flying only 5,000 departures this quarter. The largest decline has been the number of flights scheduled on mainline aircraft. No single airline has a hub operation at LAX.

Larsen noted that the RJ traffic has not increased as significantly at LAX as it has at other airports because a larger percentage of the airport’s traffic consists of transcontinental flights. In fact, the growth has been due to the increasing number of transcontinental flights, as the network carriers and low-cost carriers battle for market share. →

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<b>Top 5 Destination Markets From Top 5 Busiest Airports</b>		
<b>Busiest Airport Destination</b>	<b>Market Share</b>	<b>Average Fare</b>
<b>1. Chicago O’Hare: American Eagle</b>		
1. Columbus, Ohio	4.51%	\$143.26
2. Buffalo, N.Y.	3.60%	\$186.33
3. Madison, Wis.	3.39%	\$113.33
4. Cedar Rapids, Iowa	2.99%	\$111.10
5. Grand Rapids, Mich.	2.95%	\$115.00
<b>2. Atlanta: Atlantic Southeast Airlines</b>		
1. Panama City, Fla.	4.64%	\$132.75
2. Gulfport, Miss.	3.92%	\$121.15
3. Montgomery, Ala.	3.82%	\$146.36
4. Myrtle Beach, S.C.	3.69%	\$104.81
5. Newport News, Va.	3.64%	\$121.67
<b>3. Dallas-Fort Worth: American Eagle</b>		
1. Little Rock, Ark.	6.69%	\$89.55
2. Shreveport, La.	3.91%	\$154.24
3. Fayetteville, Ark.	3.90%	\$237.56
4. Lubbock, Texas	3.57%	\$90.79
5. Springfield, Mo.	3.56%	\$247.78
<b>4. Los Angeles International: SkyWest</b>		
1. San Diego, Calif.	16.10%	\$37.18
2. Phoenix, Ariz.	8.15%	\$77.09
3. Palm Springs, Calif.	6.89%	\$40.59
4. Fresno, Calif.	6.01%	\$91.99
5. Tucson, Ariz.	5.86%	\$90.78
<b>5. Washington Dulles: Independence Air</b>		
1. New York LaGuardia	5.17%	\$132.40
2. Newark, N.J.	4.76%	\$128.34
3. New York JFK	4.62%	\$81.27
4. Norfolk, Va.	4.36%	\$95.83
5. Jacksonville, Fla.	4.11%	\$143.60
Notes: Based on first half 2004 ODIA ticket sample. Average fares are based on one-way tickets of all fare classes, except frequent flyer, and include taxes and fees.		