

U.S. TRAVEL ASSOCIATION

THANKSGIVING IN THE SKIES

AN ANNUAL LOOK AT THE FUTURE OF AIR TRAVEL IN AMERICA

November 2014

EXECUTIVE SUMMARY

Thanksgiving in the Skies

The ultimate touchstone of how well our nation's aviation infrastructure performs is during its annual stress test: the Thanksgiving holiday weekend. As travel levels grow and U.S. airports remain stuck in neutral, the average day of air travel in the United States could very well come to resemble its busiest today—the Wednesday before Thanksgiving.

According to the analysis performed by Cambridge Systematics, passenger volumes on the Wednesday before Thanksgiving can be anywhere between 108-259 percent higher than the average day. These passenger volumes will become more frequent as air travel grows.

Virtually everyone who has traveled over the Thanksgiving holiday understands how the substantial increase in passenger volume can increase travel times to and from airports, lead to longer wait times at airline check-in counters and security checkpoints, add to the frequency of flight delays and cancellations, or lengthen the time it takes to retrieve checked baggage. From landside and terminal to airside and airspace capacity, Thanksgiving travel pushes U.S. airports to the brink and provides a frequently frustrating experience for travelers.

With that common experience in mind, this study examines a simple question: "If the U.S. fails to modernize its airport infrastructure and air traffic control system, when can travelers expect Thanksgiving-type congestion on a regular basis?"

2014 Major Findings

This year's analysis focused on the top 30 U.S. airports, which accounted for more than 70 percent of all the passenger enplanements in 2013. Using updated Federal Aviation Administration (FAA) growth projects for each airport the new study found that:

- 19 airports will average one day per week of Thanksgiving-like congestion sooner than expected.
- 25 airports will average two days per week of Thanksgiving-like congestion sooner than expected.
- 26 airports will average daily Thanksgiving-like congestion sooner than expected.

Overall, the analysis found that the outlook for more efficient, hassle-free travel is becoming bleaker. As Congress continues to delay much-needed infrastructure investments, of the nation's top 30 airports:

- Almost half (13) of our major airports are already experiencing Thanksgiving-like congestion levels at least one day every week (an increase from 6 in last year's study.)
- All 30 airports will reach their Thanksgiving-peak on an average of one day per week within the next six years.

Unless Congress acts to improve our nation's airports, air travel in the United States is headed for Thanksgiving-like congestion year-round.

- Within the next decade, 27 of the nation's top 30 airports will experience the same congestion as the Wednesday before Thanksgiving two days each week.
 - For 20 of these airports, this will happen in the next five years.
- Within the next two decades, 20 of the nation's top 30 airports will feel like the Wednesday before Thanksgiving on the average day.

Methodology

Cambridge Systematics conducted the aviation data analysis on behalf of U.S. Travel. The study analyzed daily volume data from Orbitz for transactions that represent 94 percent of U.S. airport passengers. The Orbitz data was

analyzed for the top 100 U.S. airports to capture daily variations in passenger demand during 2011 and 2012. The daily volumes were analyzed to identify average and peak days. FAA arrival enplanements (boardings) are used to rank the top 100 airports. Through its Terminal Area Forecasts (TAF), the FAA also provides specific forecasts of passenger enplanements for each airport. The study team applied the most recent TAF to predict future volumes to determine when the average day begins to look like the Thanksgiving weekend.

FAA Code	Airport Name	What Year Does / Do...					
		1 Day a Week Feels Like the Wednesday before Thanksgiving in 2012?	Closer than 2011 Forecast? (+/- years)	2 Days a Week Feel Like the Wednesday before Thanksgiving in 2012?	Closer than 2011 Forecast? (+/- years)	Every Day Feels Like the Wednesday before Thanksgiving in 2012?	Closer than 2011 Forecast? (+/- years)
MDW	Chicago Midway	2012	1	2013	2	2015	9
LAS	McCarran Intl	2012	1	2013	3	2015	10
MCO	Orlando Intl	2013	0	2014	1	2020	2
HNL	Honolulu Intl	2013	0	2015	1	2022	4
EWR	Newark Intl	2014	3	2015	8	2022	21
BWI	Baltimore-Washington Intl	2014	1	2015	4	2023	10
BOS	General Edward Lawrence Logan Intl	2014	2	2016	4	2025	13
PDX	Portland Intl	2014	1	2016	2	2025	7
SEA	Seattle-Tacoma Intl	2014	1	2016	3	2026	9
SLC	Salt Lake City Intl	2014	2	2016	4	2025	13
SAN	San Diego Intl-Lindbergh Field	2014	0	2016	0	2026	1
JFK	John F Kennedy Intl	2014	-1	2017	-2	2026	-4
MIA	Miami Intl	2014	0	2017	0	2027	2
IAD	Washington Dulles International	2015	0	2017	2	2027	6
FLL	Ft Lauderdale/Hollywood Intl	2015	-2	2017	-1	2028	-2
TPA	Tampa Intl	2015	0	2018	0	2029	2
PHX	Phoenix Sky Harbor Intl	2015	2	2018	3	2030	9
PHL	Philadelphia Intl	2015	2	2018	4	2031	11
IAH	George Bush Intercontinental Airport/Houston	2016	1	2019	3	2031	8
CLT	Charlotte/Douglas Intl	2016	0	2019	2	2034	5
MSP	Minneapolis-St Paul Intl/Wold-Chamberlain/	2016	1	2020	3	2036	9
LAX	Los Angeles Intl	2016	-1	2020	-2	2036	-3
DTW	Detroit Metropolitan Wayne County	2016	4	2021	8	2038	21
SFO	San Francisco International	2017	-1	2021	-1	2038	-1
ORD	Chicago O'Hare Intl	2017	1	2021	3	2038	8
DEN	Denver Intl	2017	4	2022	8	2042	21
DFW	Dallas/Fort Worth International	2018	3	2024	5	2044	14
ATL	The William B Hartsfield Atlanta Intl	2019	1	2025	2	2049	6
DCA	Ronald Reagan Washington National	2020	2	2027	4	2058	10
LGA	La Guardia	2020	1	2028	3	2061	6