

Office of the Assistant
Secretary for Aviation and
International Affairs

International Aviation Developments Series



U.S. International Air Passenger and Freight Statistics

September 2014



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Introduction

The *U.S. International Air Passenger and Freight Statistics* report has been developed to provide the public with additional access to international aviation data. The report is restricted to nonstop commercial traffic traveling between international points and U.S. airports. Global air travel systems are comprised of complex, ever-changing networks and alliances. The majority of international passengers to and from the U.S. make at least one connection before reaching their final destination. This report represents a limited aspect of international travel - nonstop flows into and out of the U.S. cities that serve as an international gateway will have high numbers in this report, but users should bear in mind that some portion of this traffic continued on a connecting flight to its final destination. Conversely, U.S. carriers serve some international points only through an international connection; therefore it might look as if no U.S. carrier serves a certain international point, when in fact U.S. carrier traffic is first flowing through a connecting city. Figures for U.S. nonstop market share do not necessarily correlate to the total service provided to that point by U.S. carriers.

The widespread use of code-share agreements also influences this data. Under a code-share agreement, it is common for a passenger to fly on an aircraft owned and operated by a different airline than the one from which they bought their ticket. The data in this report represents the air carrier that operated the passenger or cargo flight reported. In some cases, such as U.S. to China, regulatory impediments make it difficult for U.S. domestic carriers to operate adequate service using their own equipment. U.S. carriers compensate by marketing and selling tickets under their own code to those destinations, and then arranging for a foreign code-share partner to actually transport the passengers. Therefore, low U.S. market share in certain restricted markets is not indicative of the true proportion of passengers purchasing U.S. carrier tickets, but rather represents the actual carrier that transported the passengers reported. Code-sharing and network-flow data issues also apply to cargo shipments.

The data in this report is presented in a top-down format. Table 1 provides gross summaries of U.S.-international passengers, capacity, and freight. The same data is then broken down by world area and by country in Tables 2 through 5. Scheduled passenger data for the largest domestic gateway cities, the largest foreign gateway cities, and the largest U.S.-international airport-pairs can be found in Tables 6, 7, and 8. All data is derived from the T-100 Segment reports submitted to the Department by U.S. and foreign carriers.

The T-100 program was instituted by the Department of Transportation effective January 1, 1990. It covers traffic reports of foreign airlines operating to the United States and traffic reports of the domestic and international operations of U.S. airlines. The airlines submit these reports monthly to the Department's Office of Airline Information (OAI) of the Bureau of Transportation Statistics. The rules governing disclosure of the International T-100 data require that the data be kept confidential for a period of six months beyond the reporting date.

Users of this report should take the following points into consideration:

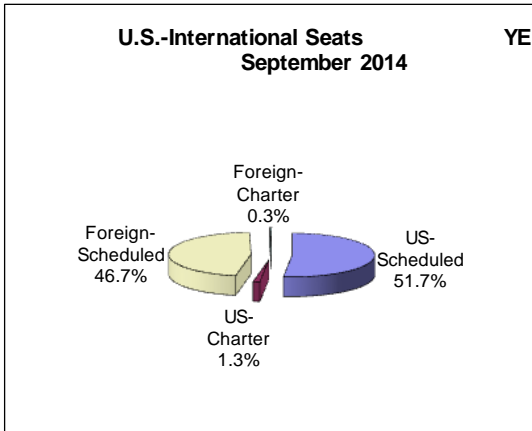
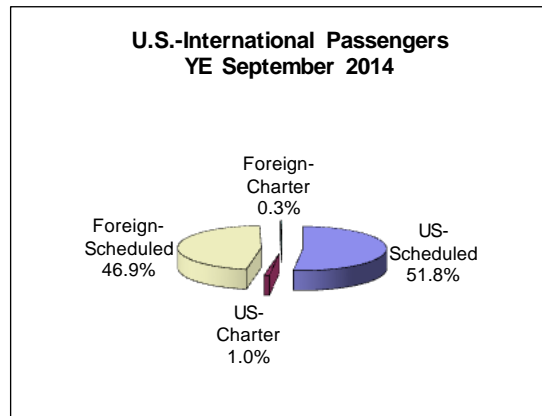
- The T-100 segment data includes all traffic arriving at U.S. airports and departing from U.S. airports on nonstop commercial international flights.
- Prior to October 1st 2002, air carriers that operated aircraft with 60 seats or less were not required to file T-100 data. Therefore prior to October 1st 2002, passenger volume in particular markets—particularly the Caribbean and certain Canadian markets – is understated in this report due to the large amount of service provided by small aircraft.

- T-100 data represents only nonstop service. The absence of U.S. nonstop service, or a low U.S. flag market share, does not necessarily correlate to the amount of service provided to that point by U.S. carriers. Many international destinations are served by U.S. carriers via connecting points. Those not heavily served on a nonstop basis are underrepresented in this report.
- Conversely, traffic on U.S.-international routes that serve as connecting gateways will exceed the number of true Origin & Destination passengers on the route because of the high percentage of traffic connecting through the gateway.
- Code-share relationships may cause U.S. carriers to seem under-represented in certain restrictive markets. This data is reported according to the operating carrier. In extensive code-share relationships (particularly to certain Asian countries) U.S. airlines sell a large number of tickets to passengers and then provide transport through the foreign code-share partner.
- Cargo carriers also employ the use of networks and code-share arrangements; therefore, cargo data is susceptible to the same reporting shortcomings in this report as passenger data.
- Freight tons do not include mail.
- The T100 dataset is dynamic and subject to edits and updates. The data in this report represent a snapshot of the T100 segment on the day the report tables are generated. This report will contain most recent data for the current month and previous 35 months.

This report is available on the Internet at <http://ostpxweb.dot.gov/aviation/>. More extensive International T-100 data is also posted at this location in a downloadable format. Questions and comments should be directed to the Office of Aviation Analysis, Office of the Secretary, at (202) 366-2352.

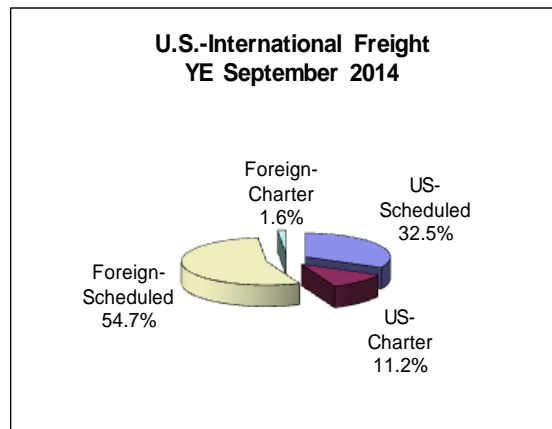
Summary for the Month of September 2014 and 12 months ended September 2014

U.S. and foreign air carriers transported 188.7 million passengers between the United States and the rest of the world for the year-ended September 2014, up 5% from the same 12 month period a year earlier . U.S. flag market share increased from a 53.4% share to a 52.8% share.



For the 12 months ended September 2014, available seats into and out of the United States increased 5.1% from the same 12 month period a year earlier to 235.2 million. During the most recent period, there were 1.55 million flights into and out of the U.S., an increase of 1.7% from the same 12 month period a year earlier . The market share of seats for U.S. flag carriers declined to 53% from 53.4%, and U.S. carriers performed 60.8% of all departures.

U.S. and foreign airlines carried 9.72 million freight tons to and from the United States during the 12 months ended September 2014, a 5.6% increase from the same 12 month period a year earlier U.S. flag share declined from 44.7% to 43.7%.



Passenger Traffic

Air passenger traffic between the U.S. and the rest of the world during the month of September 2014 increased 4.1% from a year ago to 15,029,372 passengers. U.S. airlines carried 49.6% of

total passengers traveling to or from international destinations. U.S. and foreign charter passengers accounted for 1.0% of international travel.

For the 12 months ended September 2014, U.S.-world traffic was up 5% from the same 12 month period a year earlier to 188,650,927 passengers. U.S. airlines carried 52.8% of total passengers, compared to 53.4% the previous year. U.S. and foreign charter passengers accounted for 1.3% of international travel.

World Area Trends

Eight of the nine regions experienced passenger growth between the year-ended periods September 2014 and 2013. The Middle East experienced the largest percentage increase in nonstop passenger traffic growth to and from the U.S. for the 12 months ended September 2014, rising 17.8%. Passenger traffic between the U.S. and Africa contracted the most, falling 1.1% to 1,412,070 passengers.

The largest U.S.-international regional gateway was U.S.-Europe, where 54.8 million passengers were transported during the 12 months ended September 2014 period. Europe is followed by Central America at 32.2 million passengers, and the Far East was third at 28 million passengers.

Country Trends

The top five U.S.-international country passenger gateways for the 12 months ended September 2014 were Canada, Mexico, the United Kingdom, Japan, and Germany. Of the top 25 country markets, 20 posted a positive passenger growth rate for the 12 months ended period and none experienced a loss in passenger traffic greater than 10%. U.S. flag share was up in eight of the top 25 country markets, was unchanged in three country markets, and decreased in 14 country markets.

Gateway Trends

The top five domestic scheduled passenger gateway airports for the 12 months ended September 2014 were New York, NY (JFK), Miami, FL (MIA), Los Angeles, CA (LAX), Newark, NJ (EWR), and Chicago, IL (ORD). Load factors were 70% or higher in 36 out of the top 40 domestic gateway airports. Load factors were below 60% in none of the top 40 domestic gateway airports. Passenger traffic for the 12 months ended September 2014 compared to 12 months ended September 2013 was up in 31 of the top 40 domestic gateways

The top five foreign scheduled passenger gateways for the 12 months ended September 2014 were London, United Kingdom (LHR), Toronto, Canada (YYZ), Tokyo, Japan (NRT), Frankfurt, Germany (FRA), and Paris, France (CDG). There were 29 international gateways, Tokyo, Japan (NRT); Frankfurt, Germany (FRA); Paris, France (CDG); Cancun, Mexico (CUN); Amsterdam, Netherlands (AMS); Vancouver, Canada (YVR); Calgary, Canada (YYC); Hong Kong, Hong Kong (HKG); Guadalajara, Mexico (GDL); Dubai, United Arab Emirates (DXB); Beijing, China (PEK); San Jose del Cabo, Mexico (SJD); Montego Bay, Jamaica (MBJ); Shanghai, China (PVG); Punta Cana, Dominican Republic (PUJ); Taipei, Taiwan (TPE); Bogota, Colombia (BOG); Munich, Germany (MUC); Madrid, Spain (MAD); Dublin, Ireland (DUB); San Jose, Costa Rica (SJO); Lima, Peru (LIM); Rome, Italy (FCO); Sydney, Australia (SYD); Zurich, Switzerland (ZRH); Tel Aviv, Israel (TLV); Istanbul, Turkey (IST); Puerto Vallarta, Mexico (PVR) and Edmonton, Canada (YEG), with a load factor of 80% or more for the annual period. There were no international gateways with a load factor under 60%. Of the top 40 foreign gateways, nine reported traffic losses compared to the 12 months ended September 2013. The top U.S.-international gateway segments were 1) New York, NY (JFK)-London, United Kingdom (LHR); 2) Honolulu, HI (HNL)-Tokyo, Japan (NRT); 3)

Los Angeles, CA (LAX)-London, United Kingdom (LHR); 4) New York, NY (JFK)-Paris, France (CDG); and 5) Newark, NJ (EWR)-London, United Kingdom (LHR).

Departures and Seat Capacity

Departures between the U.S. and the rest of the world for the month of September 2014 increased 2% from September 2013. Available seats increased by 4.9% over the same period. U.S. airlines provided 49.8% of international seats and 57.8% of departures. Charter service for all airlines accounted for 1.4% of international seats and 2.9% of international departures.

For the 12 months ended September 2014, U.S.-world seats increased 5.1% from the same 12 month period a year earlier to 235.2 million. Departures increased by 1.7% to 1.55 million. U.S. airlines provided 53.0% of seats, compared to 53.4% the previous year. Charter service for all airlines accounted for 3.6% of international seats and 3.1% of international departures

World Area Trends

Seven of the nine world area regions recorded an increase in annual seat capacity between the 12 months ended periods September 2014 and 2013. The Middle East reported the largest relative increase in available seats to and from the U.S., rising 18.1% to 9.3 million, while Canada-U.S. seat capacity had the largest relative decline, down 4% to 32.0 million seats.

Between the U.S. and Europe, 66.8 million seats were available for the 12 months ended September 2014, making it the largest U.S.-international regional gateway from a seat capacity standpoint. Europe is followed by Central America with 40.6 million seats, the Far East with 34.8 million seats, and Canada with 32 million seats.

Country Trends

The top five U.S.-international country gateways for seat capacity in the 12 months ended September 2014 were Canada, Mexico, the United Kingdom, Japan, and Germany. Of the top 25 U.S.-international countries, four posted negative growth rates. U.S. flag share was down in ten of the 25 country markets, was unchanged in three country markets, and increased in the remaining 12 country markets.

Freight Traffic

Air freight between the U.S. and the rest of the world in the month of September 2014 increased 4.3% from September 2013 to 804,667 tons. U.S. airlines carried 41.7% of total freight to and from international destinations. Charter service accounted for 12.4% of international freight traffic.

For the 12 months ended September 2014, U.S.-world airfreight increased 5.6% over the same 12 month period a year earlier to 9.72 million tons. U.S. airlines carried 43.7% of total freight, compared to 44.7% the previous year.

World Area Trends

The Middle East experienced the greatest relative increase in nonstop freight shipments to and from the U.S. between the 12 months ended September 2014 and 2013, rising 23%. The Far East posted the second largest increase, up 6.6%. Seven of the nine regions recorded a gain of freight traffic between the two 12 month ended periods. On an absolute basis, the Far East posted the largest increase, up 222 thousand tons to 3.6 million tons.

In addition, with 3.6 million tons transported for the 12 months ended September 2014, this area the Far East is the largest U.S. international regional freight gateway, followed closely by Europe with 3.0 million tons of freight.

Country Trends

The top five U.S.-international country gateways for freight in the 12 months ended September 2014 were Japan, Germany, the United Kingdom, China, and Hong Kong. Of the top 25 country markets, 19 posted positive freight growth rates for the 12 months ended September 2014 versus the 12 months ended September 2013. Chile had the highest loss rate at 16.2%. U.S. flag share was down in 12 of the 25 country markets, was unchanged in 5 country markets, and increased in the remaining 8 country markets.