

30 Minute Panel Discussion

Command Center

June 23, 2004

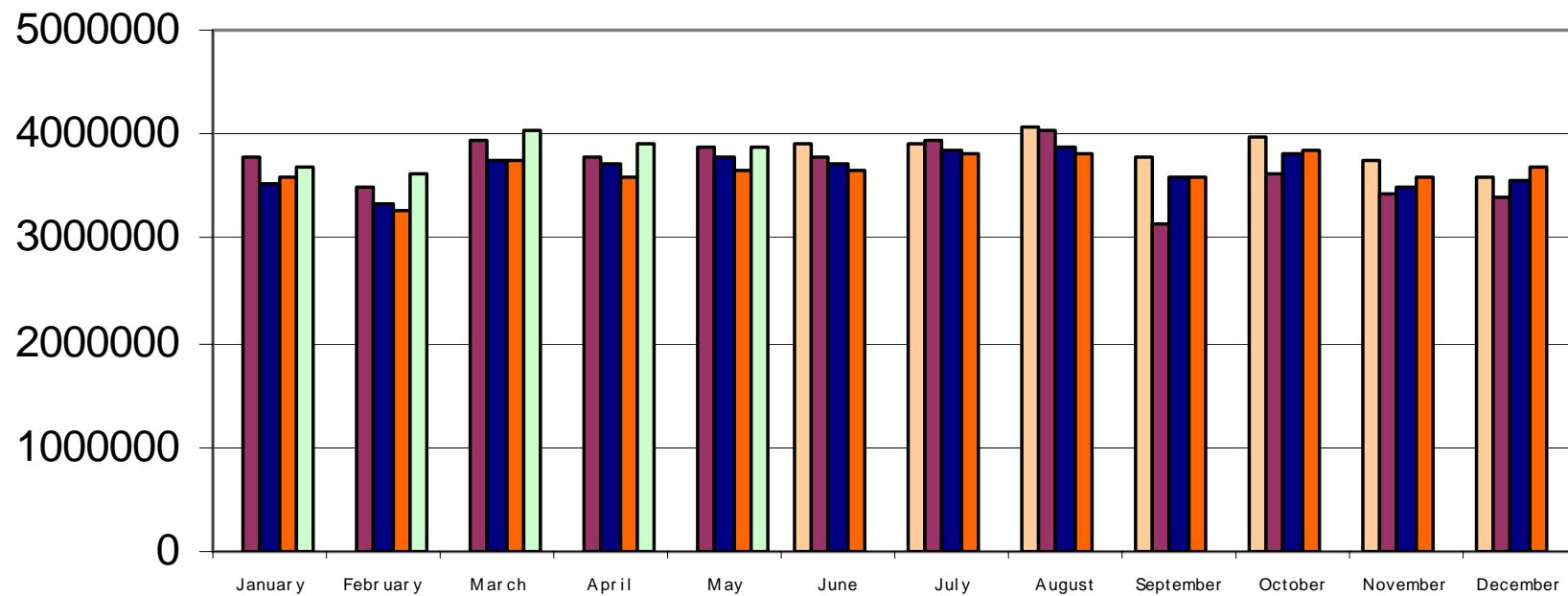


Total Center Operations



Total Center Operations

■ 2000 ■ 2001 ■ 2002 ■ 2003 ■ 2004

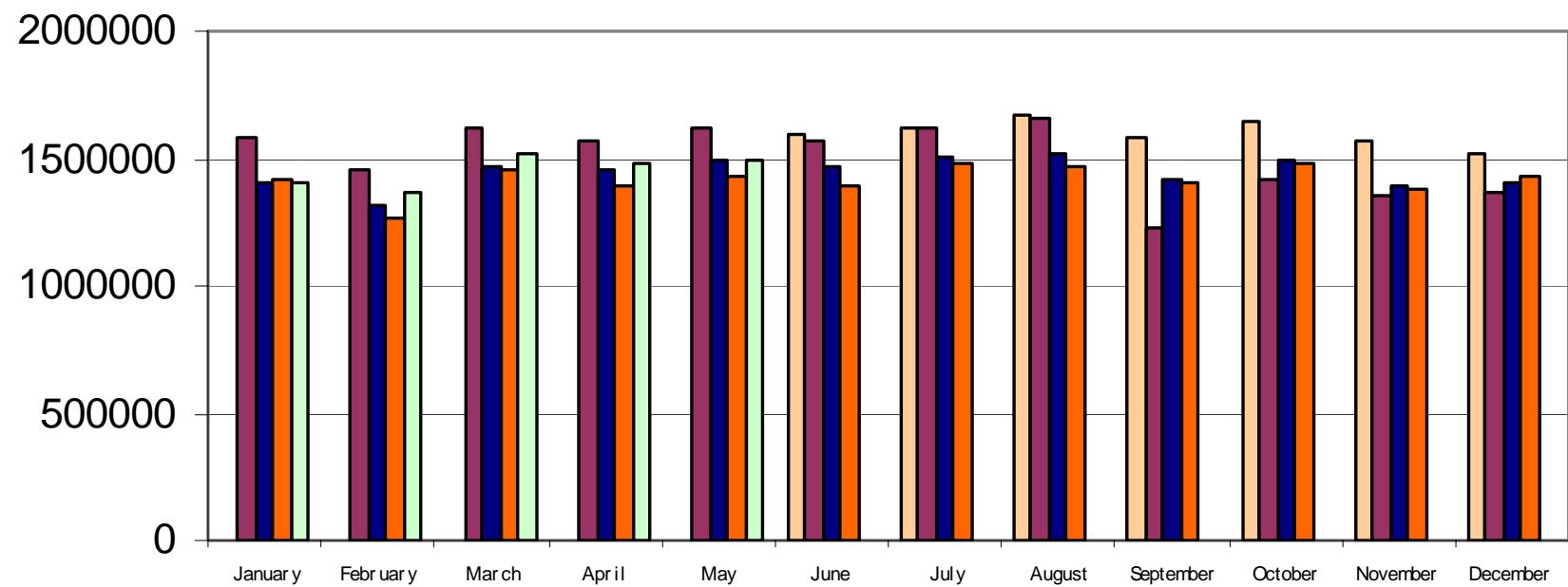


45 Select Airport Operations

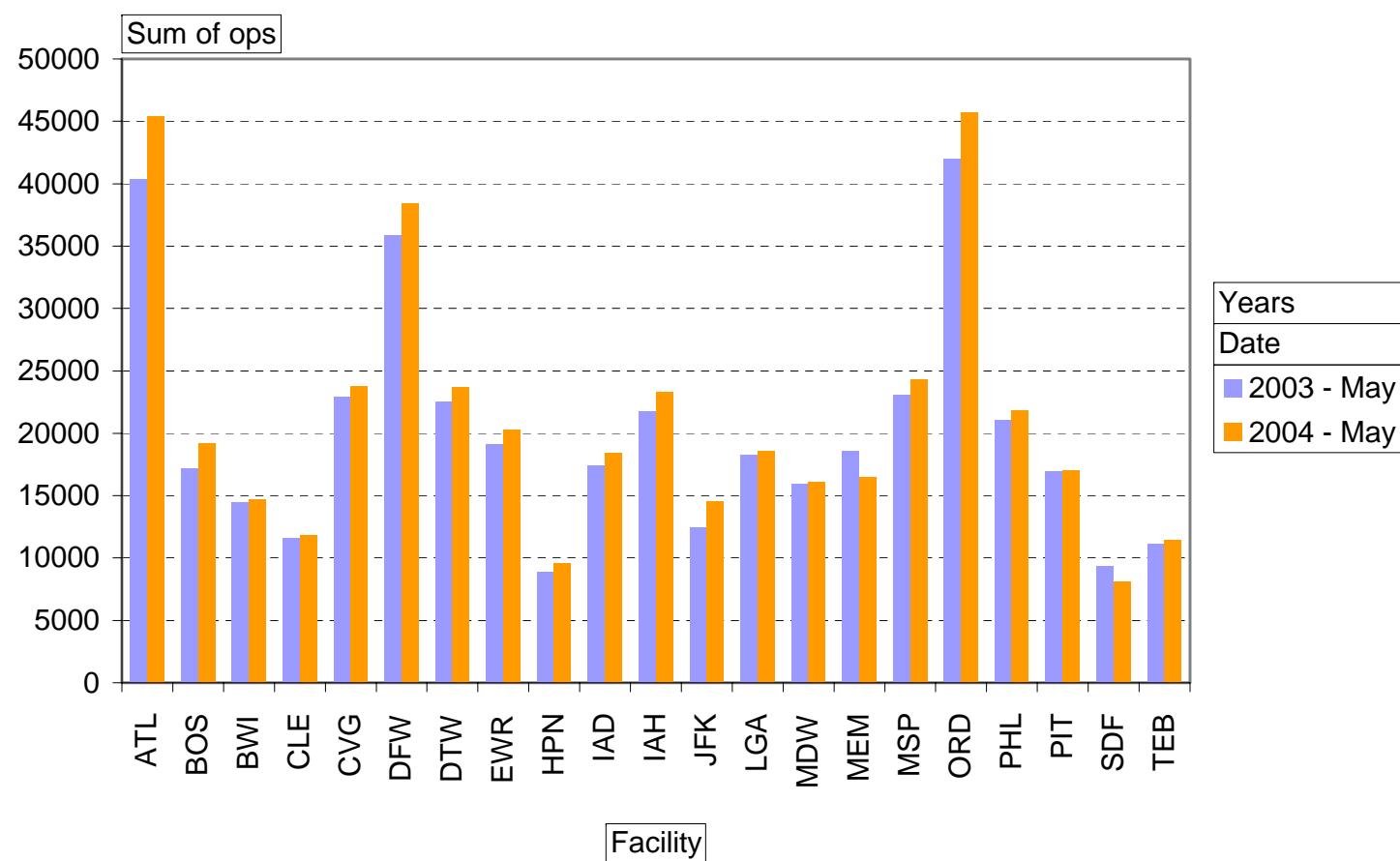


45 Select Airport Operations

2000 2001 2002 2003 2004



Traffic Volume (OPSNET)



Traffic is up in 2004 over 2003 at most of the major airports.

HR 2115, Section 423

Vision-100



- Legislation authorized additional communications between carriers during "capacity reduction events."
- Human-in-the-Loop Testing scheduled for July
 - Evaluate
 - Access to data earlier (12 Hours)
 - Staging database to model different strategies without impacting operational data
 - Incentive to cancel flights through delay reduction
 - Seat capacity and demand
 - Markets served

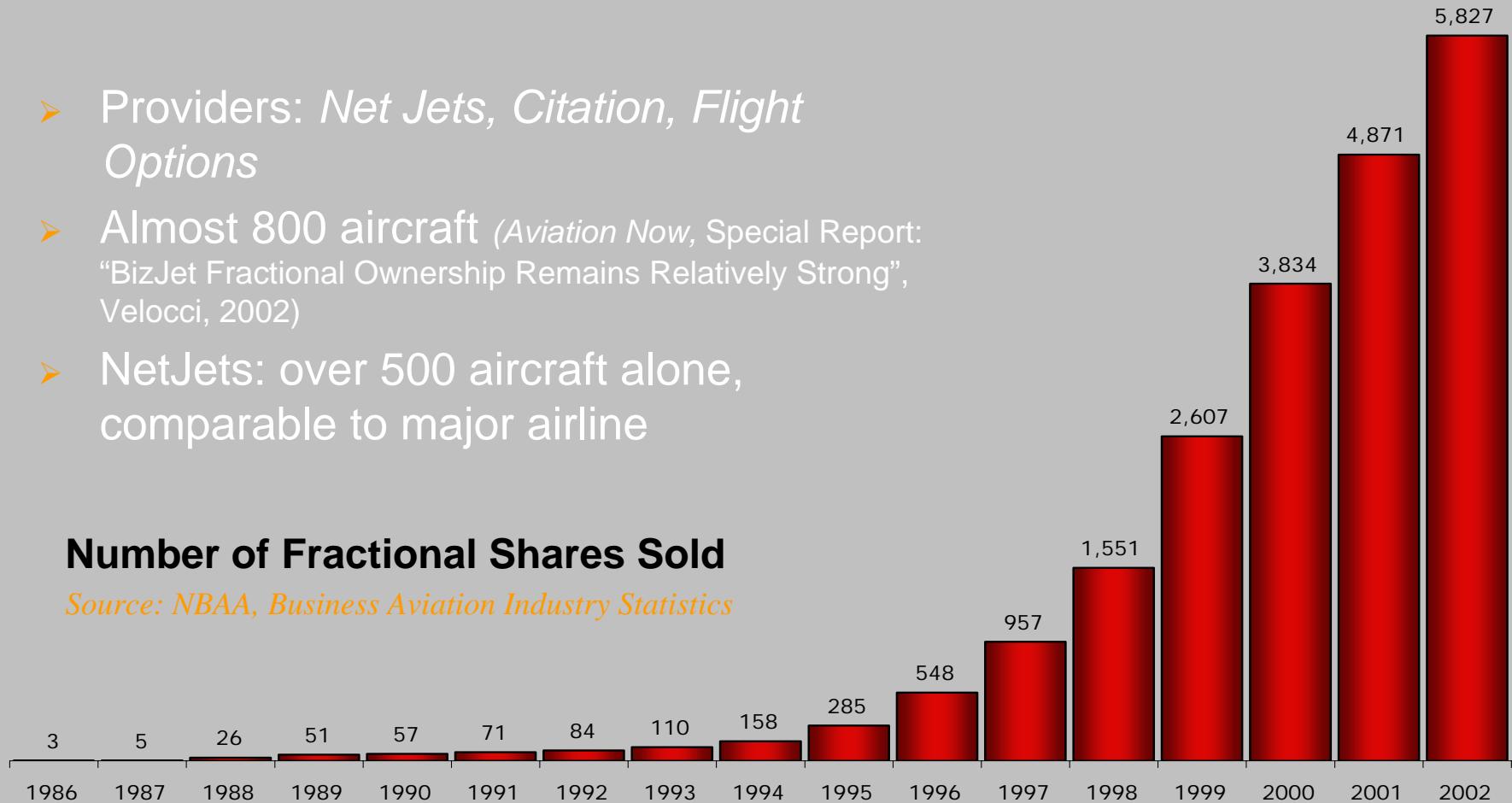
Fractional Ownership Has Taken Off Since 1996



- Providers: *Net Jets, Citation, Flight Options*
- Almost 800 aircraft (*Aviation Now, Special Report: "BizJet Fractional Ownership Remains Relatively Strong"*, Velocci, 2002)
- NetJets: over 500 aircraft alone, comparable to major airline

Number of Fractional Shares Sold

Source: NBAA, Business Aviation Industry Statistics



Regional Airline Use of RJs

- RJs allow airlines to increase passenger traffic, primarily at hubs, but also in point-to-point operation
 - Regional jets supplied 14% of airline seats in 2003* vs. 6% for turboprops
 - Regional airlines have consistently sustained double digit revenue growth since 2000 and are flying longer and more complex route structures with RJs
- Key capabilities of RJs
 - Improved productivity as a replacement/supplement for props in roles previously filled by props (especially longer routes)
 - Increased traffic and revenue
 - Increased opportunities for airlines to adopt new types of operations (change in overall operating philosophy)
- Note: many regional airline flights in CONUS are in code-sharing arrangements with major airlines

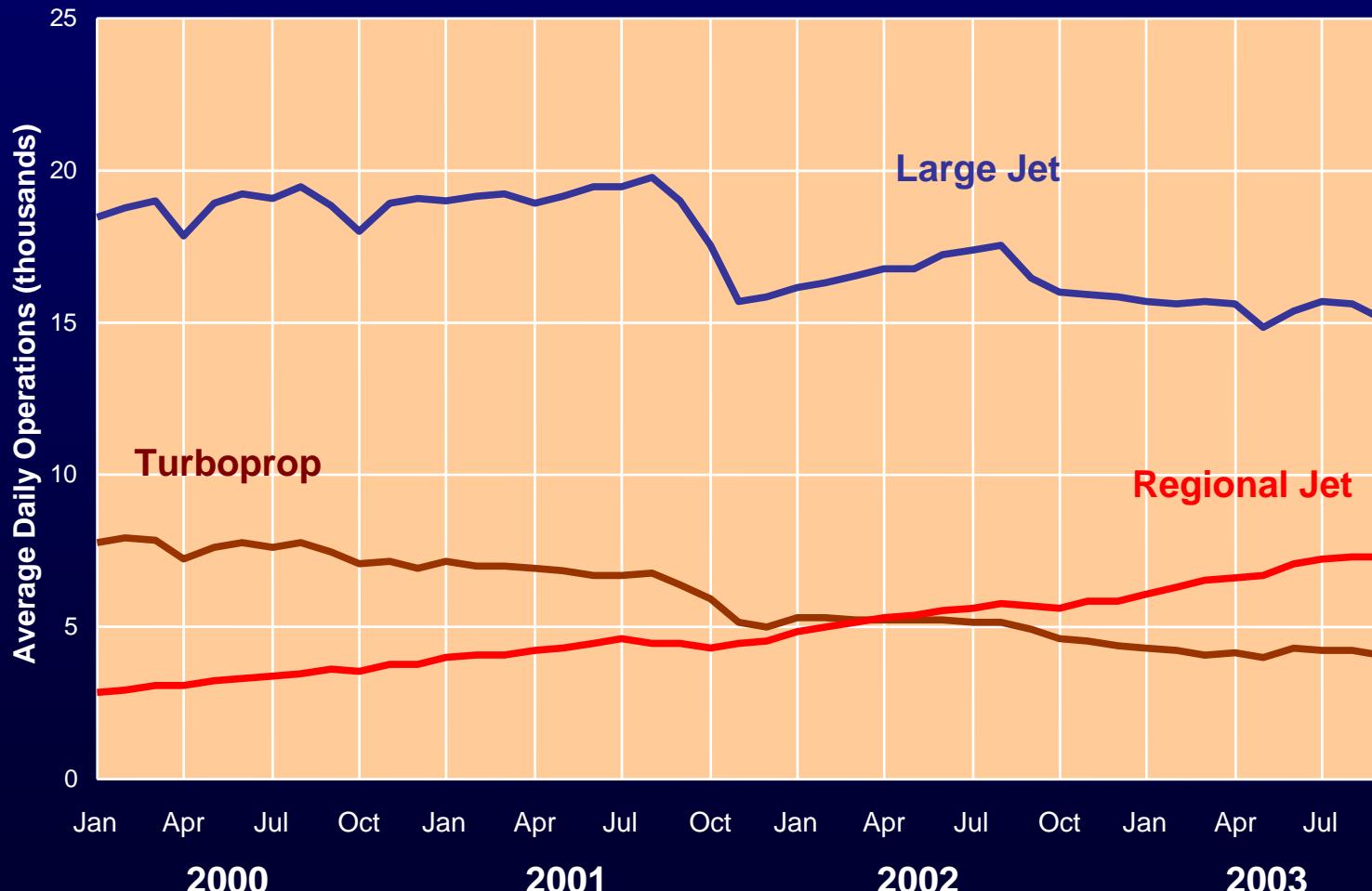
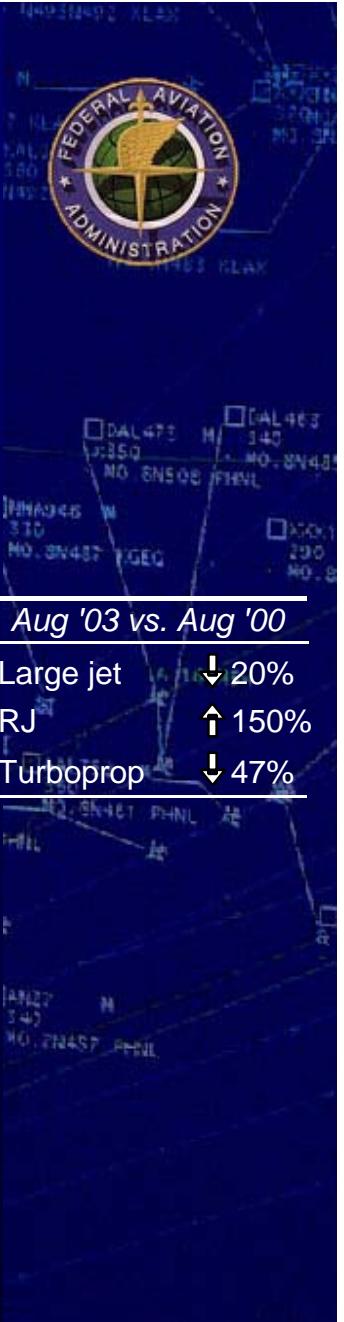


How RJs Will Affect the Airspace System

- Aggregate increase in traffic volumes may increase congestion in en route airspace and at some airports
 - Rate of retirements of props will level off at some point
 - Transition airspace (climb and descent) may see increases in congestion and traffic complexity
- Increased competition at spoke airports between airlines and competition for feed traffic to associated hub airports
 - Overall change in traffic pattern is unclear
 - Long-term, may provide opportunity to off-load some traffic from badly congested hubs, to less-congested hubs, to reliever airports, or with hub-bypass routes



Use of RJs Expands While Use of Turboprops Contracts



Source: OAG, 285 Airports, Scheduled ops down 12% overall

En Route Airspace Congestion



- RJs flying longer routes are best suited to higher altitude airspace, which is already congested

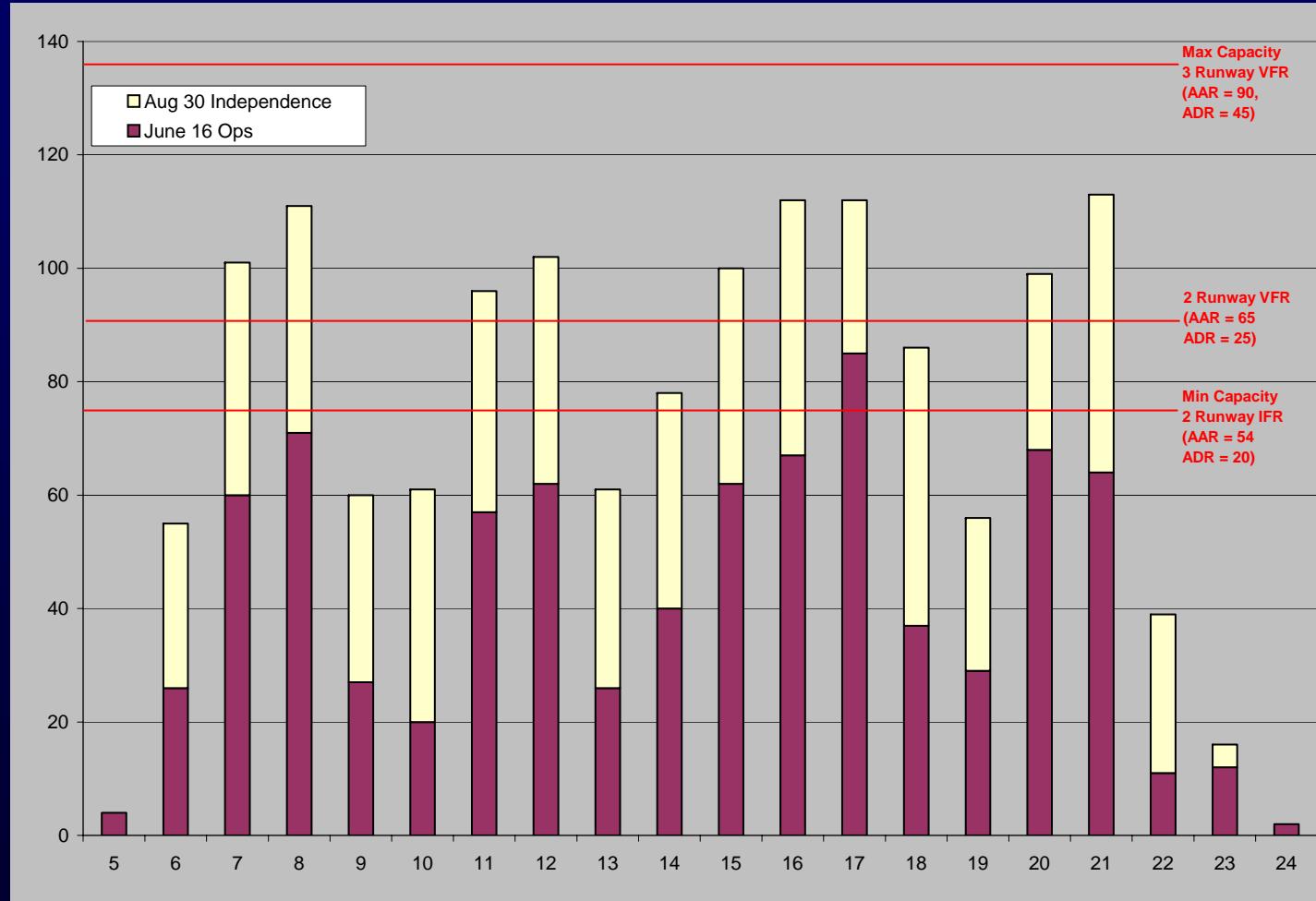


24,000 feet



Independence Air Impact on IAD

June 2004 Schedule plus Additional Operations Planned by Independence by August 30, 2004



Source: OAG, Independence Schedule provided by Independence Air, Capacity provided by IAD Tower

ATC Delays

April 2004

Total Delays for All Airports				Total Delays at the 32 Large Hub Airports				Operations at the 32 Large Hub Airports				Ground Stop Minutes for 32 Large Hub Airports				Ground Delay Program Min. for the 32 Large Hub Airports				Total Operations for Reporting Airports			
Date	Daily # Delays	Cum. Total	Daily Avg.	Daily # Delays	Cum. Total	Daily Avg.	Daily Ops	Cum. Total	Daily Avg.	GS Min	Cum. Total	Daily Avg.	GDP Min	Cum. Total	Daily Avg.	Daily # Ops	Cum. Total	Daily Avg.	Non Rpt				
04/01	1251	1251	1251	1075	1075	1075	41501	41501	41501	11714	11714	11714	29635	29835	29835	179054	179054	179054	10				
04/02	1053	2304	1152	970	2045	1023	42146	83647	41824	1463	13177	6888	24561	54386	27193	174352	353406	176703	9				
04/03	1006	3310	1103	943	2988	996	35338	118965	39662	187	13364	4466	27661	82037	27348	157808	511212	170404	10				
04/04	1070	4380	1095	918	3906	977	37637	156622	39156	1322	14666	3672	34439	116478	29119	143699	654011	163728	9				
04/05	845	5225	1045	792	4988	940	40748	197370	39474	1233	15919	3184	25570	142046	28408	178377	831288	186258	9				
04/06	721	5946	991	553	6251	875	41980	239530	39693	3074	18993	3166	3460	145606	24251	193963	1025251	170875	9				
04/07	665	6611	944	607	5858	837	42794	282144	40308	1658	20651	2860	1356	146881	20806	201984	1227235	175319	9				
04/08	1650	8281	1033	1442	7300	913	42748	324892	40813	2759	23410	2926	44528	191389	23924	194196	1421431	177879	9				
04/09	426	8687	985	391	7691	855	41642	366534	40726	227	23637	2628	2089	193478	21498	195407	161838	179649	9				
04/10	391	9078	908	341	8032	803	35308	401842	40184	152	23789	2379	244	193722	19372	157442	174280	177428	10				
04/11	719	9797	891	670	8702	791	37063	438905	39900	1154	24943	2268	12384	208108	18737	117599	189179	171989	11				
04/12	1600	11408	951	1392	10094	841	40453	479358	39947	5706	30649	25654	32964	37090	19723	161158	2053037	171086	9				
04/13	2313	13719	1055	2191	12285	945	40880	520238	40018	6929	37578	2891	88510	325680	25045	163824	2216861	170528	10				
04/14	1132	14851	1061	1081	13366	955	42547	562785	40199	1008	38586	2756	49008	375489	26821	186784	2403645	171689	8				
04/15	1567	16418	1095	1483	14829	988	43326	606111	40407	2053	40839	2709	13585	388074	25938	198684	200493	173366	9				
04/16	712	17130	1071	643	15472	967	42935	649046	40568	282	40921	2668	9533	398807	24913	206213	2805706	175357	9				
04/17	235	17365	1021	204	16676	922	36308	685354	40315	0	40921	2407	663	399270	23488	162864	296570	174622	10				
04/18	1717	19082	1060	1664	17340	963	37579	722933	40163	2612	45353	2419	34635	433095	24108	149670	311240	173238	9				
04/19	1237	20319	1069	1176	18518	975	41054	783987	40210	755	44288	2331	38752	470857	24771	168536	328778	172988	8				
04/20	1134	21453	1073	1074	19590	980	41635	805622	4028	1995	46283	2314	23041	430988	24685	185770	3472546	173627	7				
04/21	1385	22838	1088	1351	20941	997	42456	848078	40388	4467	50750	2417	30858	524568	24979	184122	356668	174127	8				
04/22	661	23499	1068	584	21252	978	42754	890832	40490	1482	52212	2373	0	524558	23843	185705	3842373	174653	7				
04/23	1116	24615	1070	1000	22525	979	42562	93394	40582	7940	60152	2615	80	524638	22810	13292	4025665	175029	7				
04/24	490	25105	1046	444	22969	957	36093	966487	40395	2035	62187	25891	1447	526083	21920	166612	4192277	174678	7				
04/25	997	26102	1044	958	23927	957	38041	1007528	40300	633	62820	2513	29454	556537	22221	152371	4344648	173786	9				
04/26	1710	27812	1070	1872	25599	985	40877	1048405	40323	747	63567	2446	64603	620140	23852	163328	405979	173384	11				
04/27	424	28236	1046	381	25980	962	42139	1090544	40391	908	64475	2388	3894	624034	23112	186618	4694594	173874	16				
04/28	1187	29423	1051	1150	27130	969	42266	1132810	40458	1826	66301	2368	46532	670568	23949	176224	4873818	174065	23				
04/29	1359	30782	1061	1303	28433	980	40388	1175848	40548	2349	68650	2387	36844	70140	24393	177378	501198	174179	17				
04/30	1836	32618	1087	1673	30106	1004	40331	1216179	40530	742	69392	2313	30199	737609	24587	137719	5188915	172964	128				
APR	Tot Delays =	17474	Tot Delays@32 =	15144	Tot Ops@32 =	15822	Tot GS@32 =	1138324	Tot GDP@32 =	65796	Tot Ops@32 =	296563	Tot Ops =	5024982									
	Difference +	15144	Difference +	14284	Difference +	77855	Difference +	35906	Difference +	441046	Difference +	441046	Difference +	163933									
	% Change =	187%	% Change =	190%	% Change =	107%	% Change =	106%	% Change =	249%	% Change =	249%	% Change =	103%									
2003	Daily Avg =	582	Daily Avg =	527	Daily Avg =	37944	Daily Avg =	2193	Daily Avg =	9885	Daily Avg =	187499	Daily Avg =	187499									
	Difference +	505	Difference +	477	Difference +	2595	Difference +	120	Difference +	14702	Difference +	5465	Difference +	5465									
	% Change =	187%	% Change =	191%	% Change =	107%	% Change =	106%	% Change =	249%	% Change =	103%	% Change =	103%									

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ATC Delays

May 2004

Total Delays for All Airports				Total Delays at the 32 Large Hub Airports				Operations at the 32 Large Hub Airports			Ground Stop Minutes for 32 Large Hub Airports			Ground Delay Program Min. for the 32 Large Hub Airports			Total Operations for Reporting Airports			
Date	Daily # Delays	Cum. Total	Daily Avg.	Daily # Delays	Cum. Total	Daily Avg.	Daily Ops	Cum. Total	Daily Avg.	GS Min	Cum. Total	Daily Avg.	GDP Min	Cum. Total	Daily Avg.	Daily # Ops	Cum. Total	Daily Avg.	Non Rpt	
05/01	603	603	603	533	533	533	35802	35802	35802	6593	6593	6593	2282	2282	2282	150543	150543	150543	0	
05/02	1154	1757	879	1070	1603	802	37709	73511	36756	6417	13010	6505	28094	30356	15178	143529	294072	147036	7	
05/03	1035	2792	931	971	2574	858	40537	114048	38016	3947	16957	5652	31417	61773	20501	168861	462933	154311	7	
05/04	540	3332	833	422	2998	749	42390	156438	39110	2286	19243	4811	6645	68418	17105	198958	861891	165473	7	
05/05	741	4073	815	591	3587	717	42936	199374	39875	2633	21876	4375	379	68797	13759	205439	867330	173466	7	
05/06	922	4995	833	823	4410	735	43324	242688	40450	1320	23196	3866	10785	79582	13264	210502	1077382	179564	7	
05/07	2080	7085	1012	1890	6300	900	42289	284987	40713	14210	37408	5344	41925	121507	17358	192169	1289551	181384	7	
05/08	429	7514	939	417	6717	840	35752	320739	40092	744	38150	4769	1278	122785	15348	165482	1435033	179379	7	
05/09	1801	9115	1013	1659	8276	920	36126	356865	39852	51885	51985	5778	31141	15926	17103	136452	1571488	174609	9	
05/10	1558	10673	1067	1493	9769	977	40371	397238	39724	5399	57384	5738	32400	186324	18633	168587	174007	174007	7	
05/11	1838	12509	1137	1648	11417	1038	41897	439133	39921	11149	68533	6230	21224	207550	18868	176151	1916223	174202	7	
05/12	2646	15185	1263	2430	13847	1154	41497	480630	40053	15488	84021	7002	79784	287334	23945	183978	2100201	175017	7	
05/13	2866	18021	1388	2594	16441	1265	42246	522878	4022	26794	110815	8524	81036	368370	28336	178546	2278747	175288	7	
05/14	2336	20357	1454	2079	18520	1323	41932	564808	40343	8848	119663	8547	68324	436864	31192	178100	2456847	175489	7	
05/15	405	20762	1384	355	18875	1258	36622	601430	40098	1442	121105	8074	2828	439522	29301	162817	2619864	174844	9	
05/16	778	21640	1348	694	19569	1223	37920	639350	39956	2365	123460	7716	220	439742	27484	157492	2777156	173572	8	
05/17	2591	24131	1419	2434	22003	1294	39498	678848	39932	14365	137825	8107	64805	504347	28667	167783	2944939	173232	7	
05/18	2984	27115	1508	2780	24783	1378	41171	720019	40001	10781	148608	8256	99667	604014	33556	178458	3123395	173522	7	
05/19	1786	28901	1621	1632	26395	1389	42886	762905	40153	1834	150440	7918	29783	633797	33358	191655	3315050	174478	7	
05/20	1028	29629	1496	954	27349	1387	42277	805182	40256	1812	152252	7813	9446	643243	32162	165548	3510598	176530	8	
05/21	2888	32797	1562	2871	30020	1430	41079	846261	40298	16088	168340	8016	69976	113240	33964	180910	3691508	175786	7	
05/22	1252	34049	1548	1202	31222	1419	35619	881880	40085	4712	173052	7886	30984	744204	33827	146279	3837787	174445	9	
05/23	2166	36215	1675	2035	33257	1446	36808	918888	39943	10418	183470	7977	38775	762979	34043	141247	3979034	173001	9	
05/24	2298	38513	1605	2112	36369	1474	40835	956521	39960	8011	191481	7978	65440	848419	35351	166987	4146021	172751	12	
05/25	1438	39049	1598	1273	36642	1466	42277	1001798	40073	7098	198579	7943	7863	856282	34251	186527	4332548	173302	10	
05/26	2482	42431	1632	2325	38067	1499	42468	1044266	40164	13085	212564	8176	33982	800264	34241	180875	4513223	173588	18	
05/27	2265	44696	1655	1857	40824	1512	42963	1087229	40268	12499	225063	8336	914793	33881	184347	4097570	173884	26		
05/28	1928	46624	1665	1588	42412	1515	43159	1130388	4037	5458	230521	8233	41548	956341	34155	168043	4885613	173772	41	
05/29	809	47433	1638	768	43178	1489	33607	1163965	40138	1994	232516	8018	16083	972424	33532	136900	5002513	172500	47	
05/30	1344	49777	1626	1278	44466	1482	32192	1196187	39872	18886	251401	8380	31508	100933	33484	111598	5114108	170470	44	
05/31	2069	50846	1640	1985	46421	1497	36735	1232922	39772	8538	259939	8385	101398	1105329	35866	103471	5217580	168309	140	
MAY	Tot Delays = 26544			Tot Dels@32 = 24170			Tot Ops@32 = 1168529			Tot GS@32 = 135620			Tot GDP@32 = 390388			Tot Ops = 5150054				
2003	Difference + 24302			Difference + 22251			Difference + 64393			% Change = 192%			Difference + 124419			Difference + 67526				
	% Change = 192%			% Change = 192%			% Change = 108%			% Change = 192%			% Change = 283%			% Change = 101%				
	Daily Avg = 856			Daily Avg = 780			Daily Avg = 37694			Daily Avg = 4372			Daily Avg = 12593			Daily Avg = 166131				
	Difference + 784			Difference + 717			Difference + 2078			Difference + 4013			Difference + 23063			Difference + 2178				
	% Change = 192%			% Change = 192%			% Change = 108%			% Change = 192%			% Change = 283%			% Change = 101%				

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ATC Delays

June 2004



Total Delays for All Airports			Total Delays at the 32 Large Hub Airports			Operations at the 32 Large Hub Airports			Ground Stop Minutes for 32 Large Hub Airports			Ground Delay Program Min. for the 32 Large Hub Airports			Total Operations for Reporting Airports				
Date	Daily # Delays	Cum. Total	Daily Avg.	Daily # Delays	Cum. Total	Daily Avg.	Daily Ops	Cum. Total	Daily Avg.	GS Min	Cum. Total	Daily Avg.	GDP Min	Cum. Total	Daily Avg.	Daily # Ops	Cum. Total	Daily Avg.	Non Rpt
06/01	1502	1502	1502	1458	1458	1458	40255	40255	40255	16872	16872	16872	13029	13029	13029	168124	168124	168124	7
06/02	1862	3454	1727	1805	3063	1532	42248	82503	41252	7339	24211	12108	28515	41544	20772	187106	355230	177615	8
06/03	728	4182	1394	589	3852	1217	43089	125592	41864	2119	28330	8777	6074	47818	15873	206602	561832	187277	7
06/04	737	4919	1230	700	4352	1088	42824	168416	42104	2252	28582	7146	1667	40285	12321	200668	762500	190625	8
06/05	419	5338	1068	371	4723	945	36098	204514	40903	319	28901	5780	1419	50704	10141	159048	921548	184310	8
06/06	703	6041	1007	626	5349	892	37788	242302	40384	1028	29929	4988	1100	51804	8634	146129	1067677	177946	8
06/07	1927	7968	1138	1854	7203	1029	41033	283335	40476	4264	34193	4885	31962	83766	11987	167643	1235320	176474	11
06/08	2000	9968	1246	1800	9003	1125	42027	325362	40870	5750	30943	4993	38453	122219	15277	177143	1412463	176558	17
06/09	2980	12948	1439	2701	11704	1300	41290	366652	40739	22800	62743	6971	65574	187793	20866	175269	1587732	176415	9
06/10	3044	15992	1599	2788	14492	1449	42994	409646	40965	9871	72414	7241	89602	277485	27749	177932	1785664	1785668	9
06/11	1692	17684	1608	1659	16151	1468	44132	453778	41253	4775	77189	7017	26939	304424	27675	182597	1948261	177115	13
06/12	406	18900	1508	380	16531	1378	35882	489660	40805	5015	82204	6850	281	304705	25392	165868	2114129	176177	13
06/13	1643	19733	1518	1524	18055	1389	37924	527584	40583	13517	95721	7363	30597	336302	25792	154460	2288589	174607	11
06/14	2380	22113	1580	2173	20228	1445	40963	568547	40611	18537	114258	8161	60381	396683	28263	163216	2431805	173700	18
06/15	2977	25090	1673	2809	23037	1536	42249	610798	40720	9637	123895	8280	79887	475560	31703	181531	2613336	174222	28
06/16	2673	27763	1735	2477	25514	1595	42795	653591	40849	15014	138909	8862	23394	498944	31194	179865	2793201	174675	38
06/17	3041	30804	1812	2774	28288	1664	38966	662557	40739	13370	152279	8958	89503	586447	34615	131246	2924447	172026	147
JUN	Tot Delays = 16581			Tot Dels@32 = 14966			Tot Ops@32 = 65539			Tot GS@32 = 114876			Tot GDP@32 = 175581			Tot Ops = 2903212			
	Difference + 14223			Difference + 13322			Difference + 37018			Difference + 37403			Difference + 412866			Difference + 21235			
	% Change = 186%			% Change = 188%			% Change = 106%			% Change = 133%			% Change = 335%			% Change = 101%			
2003	Daily Avg = 975			Daily Avg = 880			Daily Avg = 38561			Daily Avg = 6757			Daily Avg = 10328			Daily Avg = 170777			
	Difference + 837			Difference + 784			Difference + 2178			Difference + 2201			Difference + 24287			Difference + 1249			
	% Change = 186%			% Change = 180%			% Change = 106%			% Change = 133%			% Change = 335%			% Change = 101%			

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