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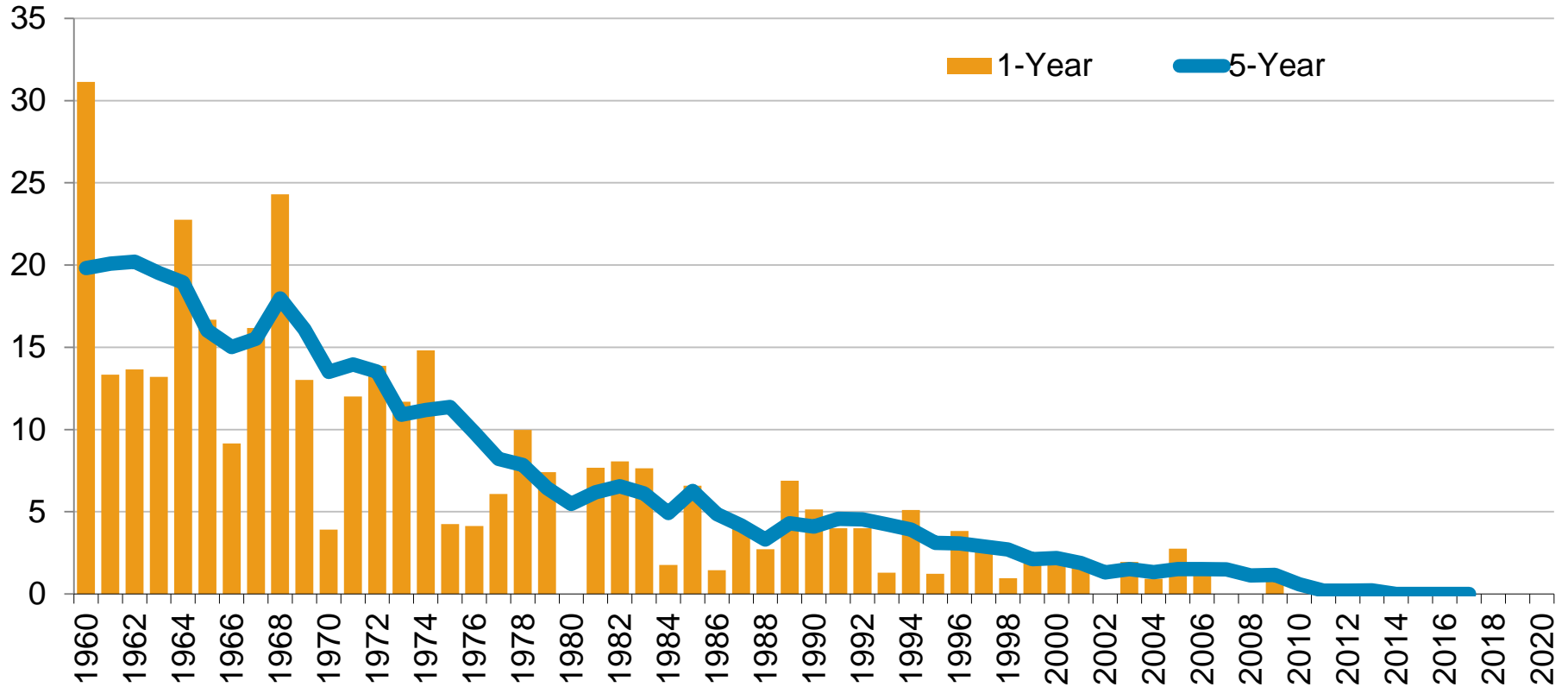
**The Air Travel Value Proposition:  
Safer, Cheaper, Greener, Quieter – and Fast**

Updated February 8, 2018

# U.S. Airline Industry Safety Has Improved Markedly

## NTSB Fatal Accident Rate Reduced 100 Percent in Recent Years

Fatal Accidents per 10M Aircraft Departures in Scheduled Service

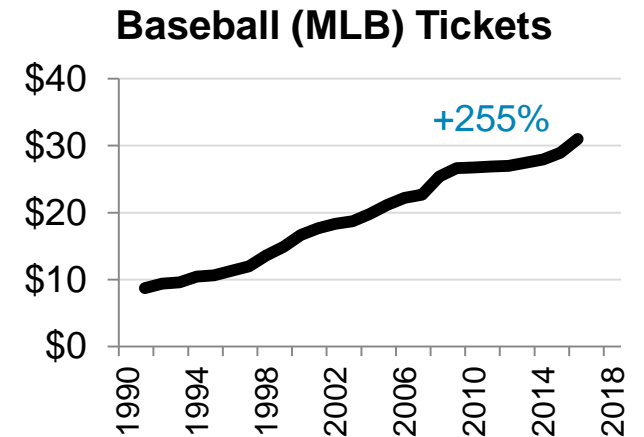
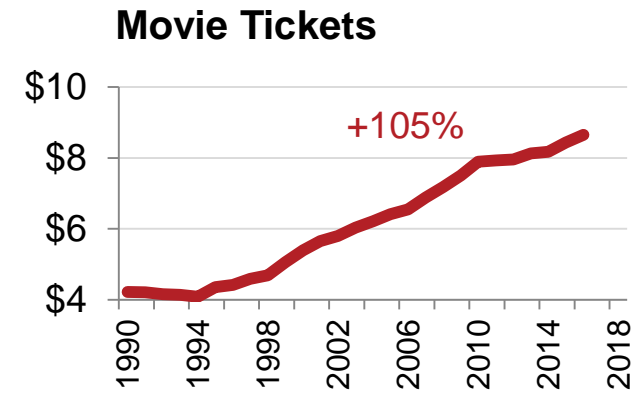
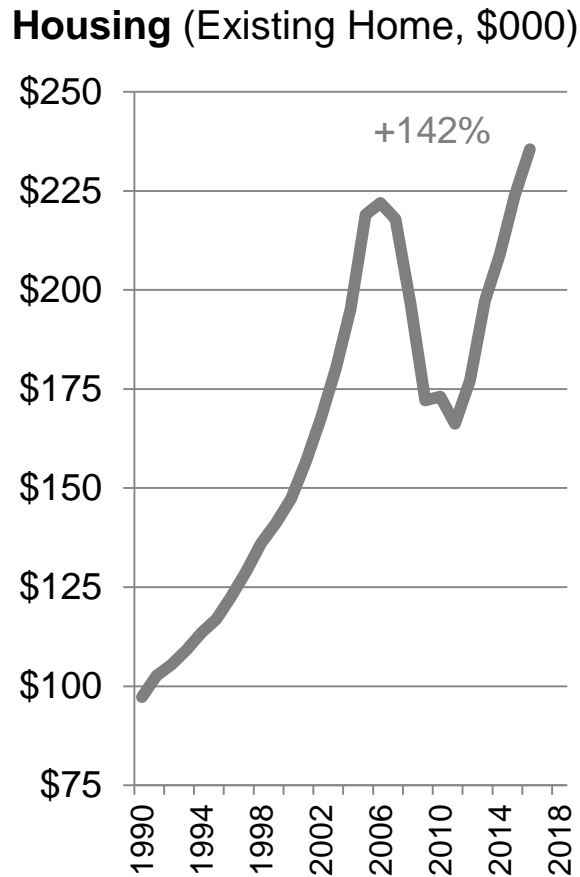
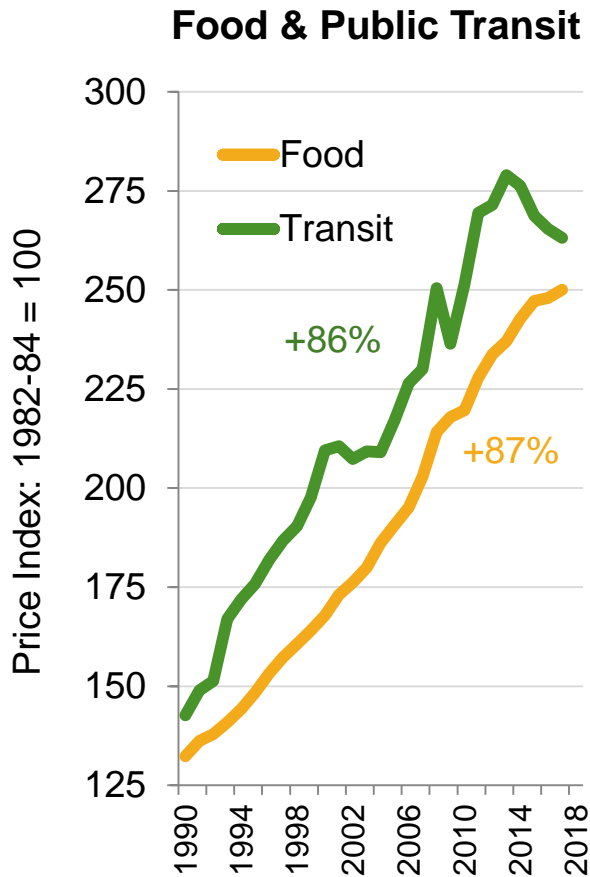


Source: A4A analysis of data from the National Transportation Safety Board (Tables 6 and 12)



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# Americans Have Seen Increases in the Average Price of Food, Shelter, Public Transportation and Entertainment Over The Past Two and a Half Decades

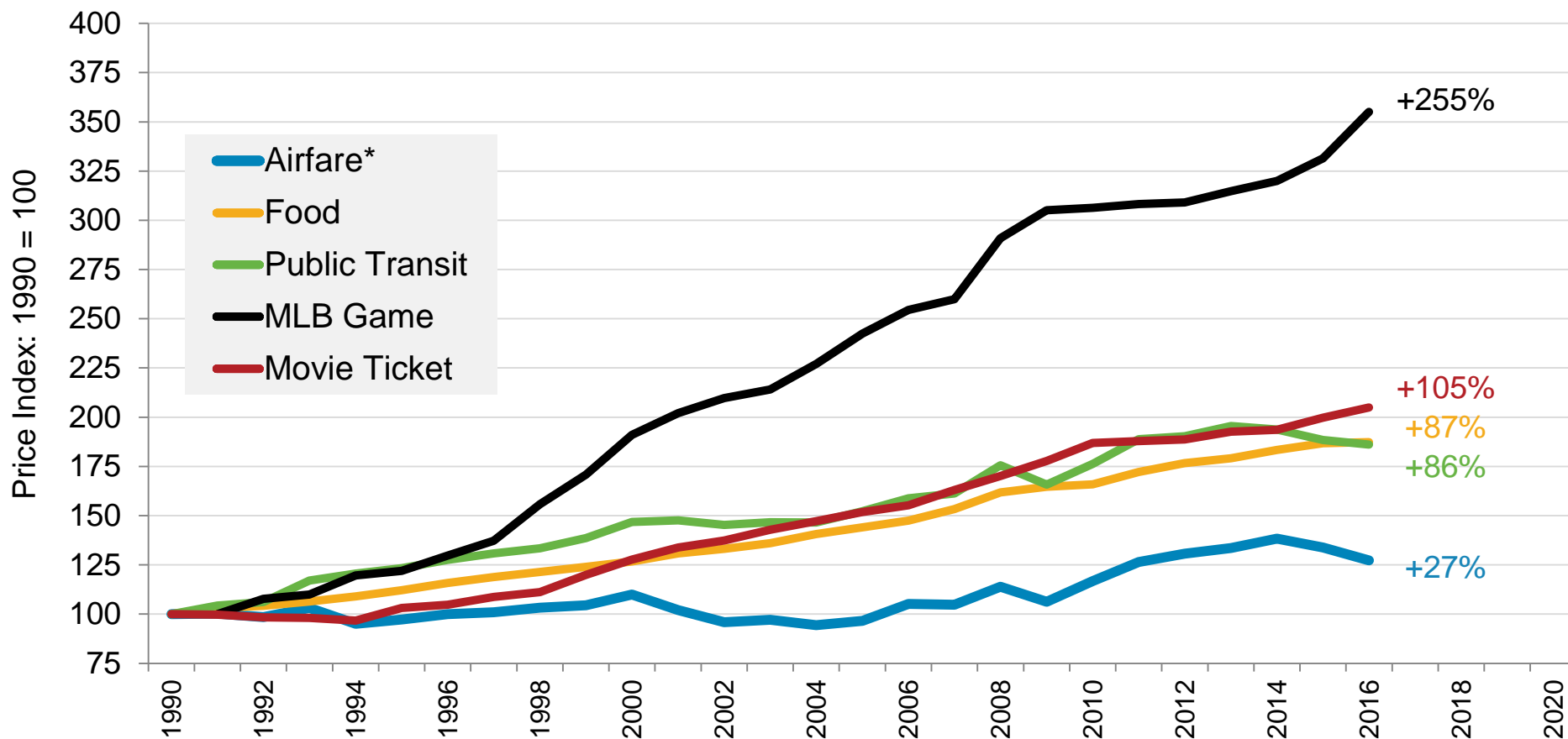


Source: Federal Reserve Bank of St. Louis, National Association of Realtors, National Association of Theatre Owners, Team Marketing Report



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# Over the Past 26 Years, the Price of Purchasing Food, Taking the Bus/Train, or Going to the Movies/Ballpark Has Significantly Outpaced the Price of Taking a Trip by Air



Source: A4A, BTS, FRB St. Louis, National Association of Theatre Owners, Team Marketing Report

\* Domestic round-trip average, including bag and change fees



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# Air Transport Association Advertisement, *The Saturday Evening Post*, March 22, 1941

**“Air Travel Is Not Expensive: See for Yourself...It Costs Less Than You Think”**

One-way from BOS to LAX in 1941 cost \$156.42 and took 15 hours and 15 minutes with up to 12 stops

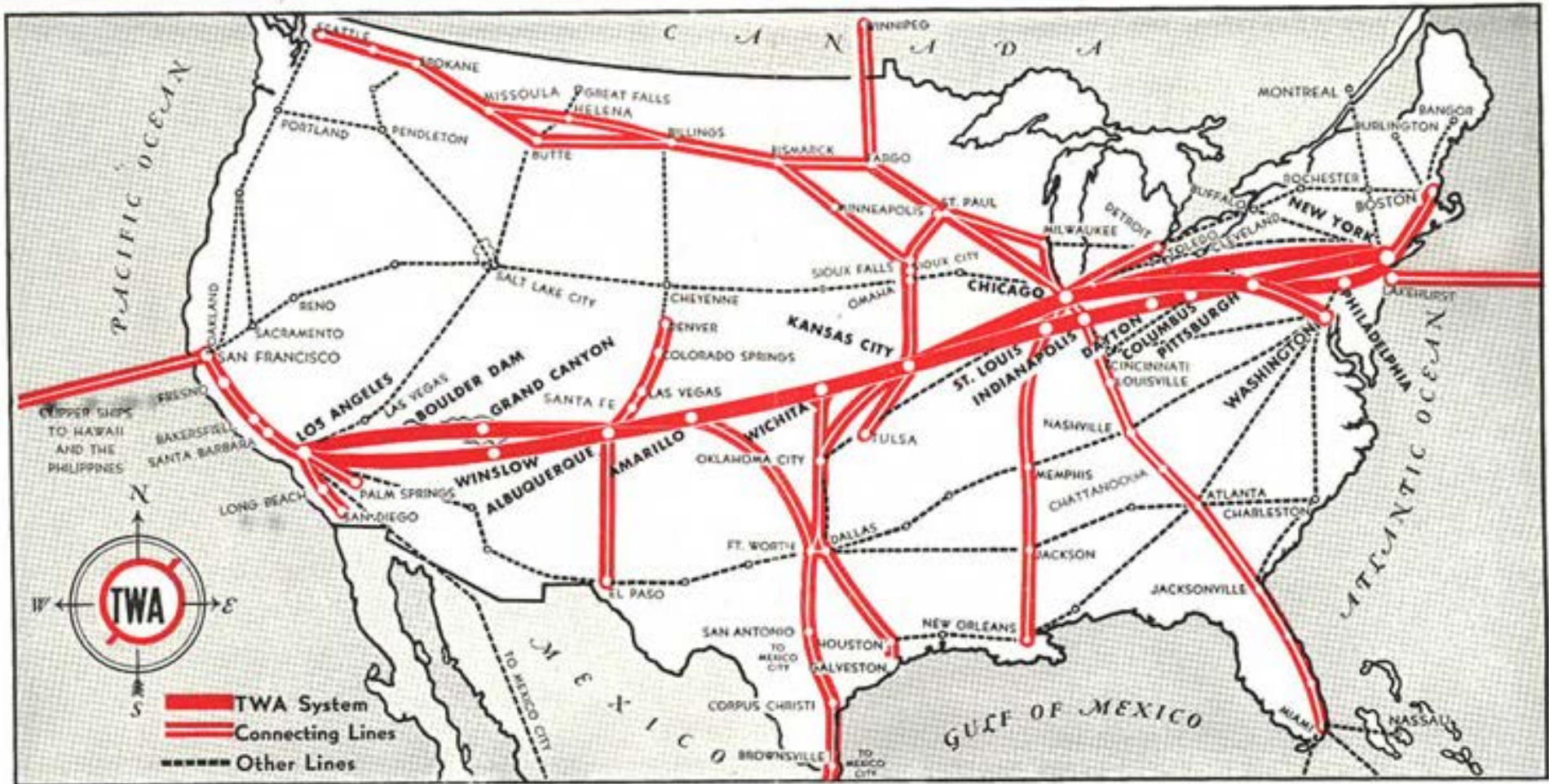
One-way Fares Elapsed Time ★ between	Atlanta	Chicago	Cleveland	Houston	Kansas City	Los Angeles	Memphis	Mexico City	Miami	Phoenix	St. Louis
Bermuda \$ ★Time	118.15 12:35	114.95 12:35	96.70 10:35	164.15 21:00	136.45 15:30	219.95 25:50	132.10 13:09	222.60 28:05	141.75 15:20	209.90 22:50	123.50 13:50
Boston \$ Time	60.10 7:47	51.42 5:03	35.17 3:37	106.10 12:25	77.92 7:26	156.42 15:15	77.05 8:10	164.55 20:40	83.70 8:47	148.57 17:10	63.37 8:01
Dallas- Ft. Worth \$ Time	38.50 5:27	46.85 6:22	64.40 8:57	14.00 1:35	27.50 3:38	69.85 7:22	27.40 2:30	70.00 7:10	75.75 10:42	57.30 6:07	33.90 4:23
Denver \$ Time	79.90 14:50	51.47 5:17	69.72 7:20	60.80 8:12	36.15 5:04	57.23 6:50	61.98 11:07	116.80 16:07	122.55 20:30	58.95 9:13	49.10 7:06
Detroit \$ Time	46.40 7:10	13.75 1:38	7.90 0:39	74.10 11:29	35.25 4:13	118.75 13:03	40.13 6:18	130.10 18:08	83.65 10:40	113.65 14:38	26.20 8:23
Minneapolis- St. Paul \$ Time	55.40 10:25	16.50 2:15	34.75 4:45	65.50 11:47	24.00 3:26	101.91 14:17	42.28 5:55	121.50 18:35	92.65 13:35	107.50 16:55	28.35 4:00
New Orleans \$ Time	25.70 2:40	46.64 6:15	63.46 8:15	20.30 2:05	46.64 3:35	99.46 16:20	19.76 2:30	80.30 9:10	47.20 6:23	86.91 14:00	33.69 4:20
New York \$ Time	48.15 5:30	44.95 3:33	26.70 2:23	94.15 11:10	66.45 6:03	149.95 13:45	62.10 5:57	152.60 18:20	71.75 8:25	139.90 14:57	53.50 5:40
Pittsburgh \$ Time	49.35 5:38	23.95 2:29	7.00 0:50	80.40 12:08	45.45 4:42	128.95 12:35	45.70 6:02	136.40 19:15	72.95 8:15	119.50 13:52	32.50 3:08
San Francisco \$ Time	126.55 16:50	105.00 11:12	123.25 13:45	102.80 12:40	94.03 11:24	18.95 2:00	115.45 13:16	128.95 18:15	168.20 14:30	42.10 4:30	105.00 14:00
Seattle \$ Time	137.90 21:50	99.00 13:05	117.25 15:40	127.23 17:40	96.24 13:08	62.93 7:00	125.88 18:16	172.93 23:15	175.15 26:50	86.08 10:00	111.95 15:19
Washington \$ Time	35.95 2:50	36.00 3:49	19.10 1:55	81.95 9:15	56.65 6:06	139.75 13:55	49.90 4:15	140.45 16:30	59.55 6:45	127.75 13:15	43.70 4:40

*Fares include meals. No tips, no extras. 10% saving on round-trip tickets.  
Fares subject to change without notice*

★ Elapsed time in hours and minutes

# BOS-LAX Was Not a Simple Journey in the So-Called “Golden Age” of Air Travel

SKYCLUB SERVICE BY DAY... SKYSLEEPERS BY NIGHT

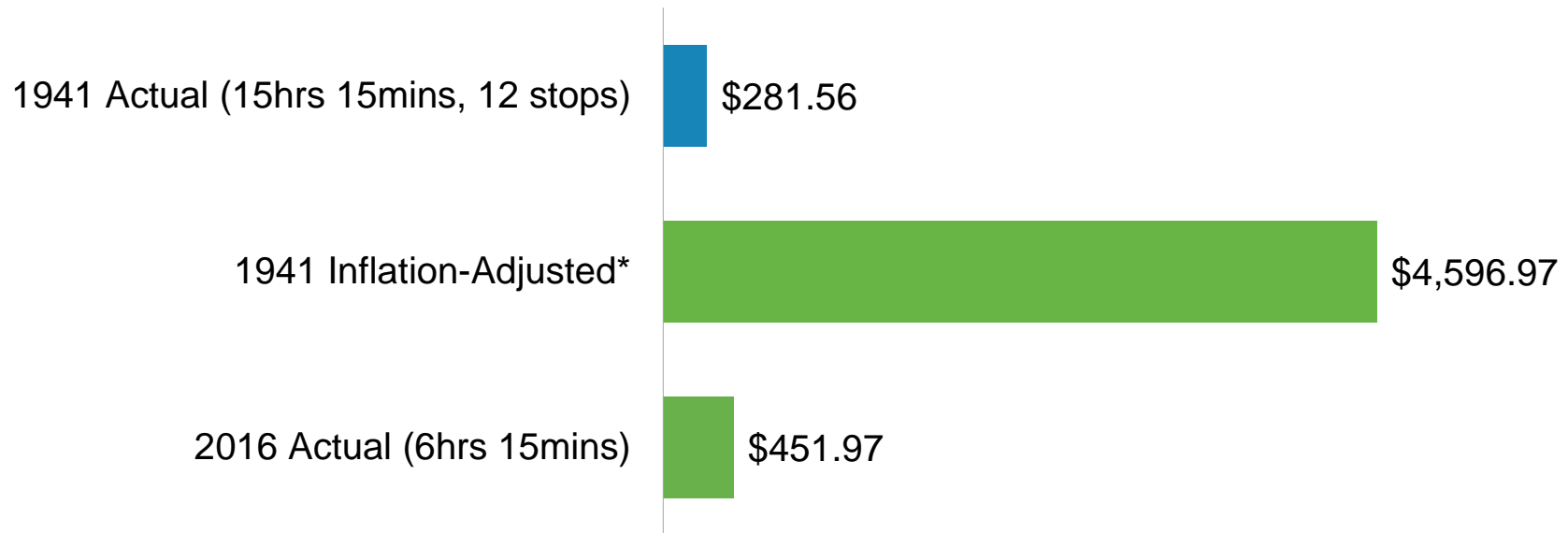


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# Boston-Los Angeles Air Travel, 75 Years After the *Evening Post* 9 Hours Faster, 90% Cheaper (in Real\* Terms)

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## Average *Round-Trip* BOS-LAX Airfare and *One-Way* Block Time



\* Adjusted using 2016 constant dollars from the Bureau of Labor Statistics (<http://www.bls.gov/cpi/#tables>)

Source: DOT Data Bank 1B via Diio Mi; "Air Travel Is Not Expensive," *The Saturday Evening Post* (Mar. 22, 1941), p. 59; Campbell-Hill Aviation Group

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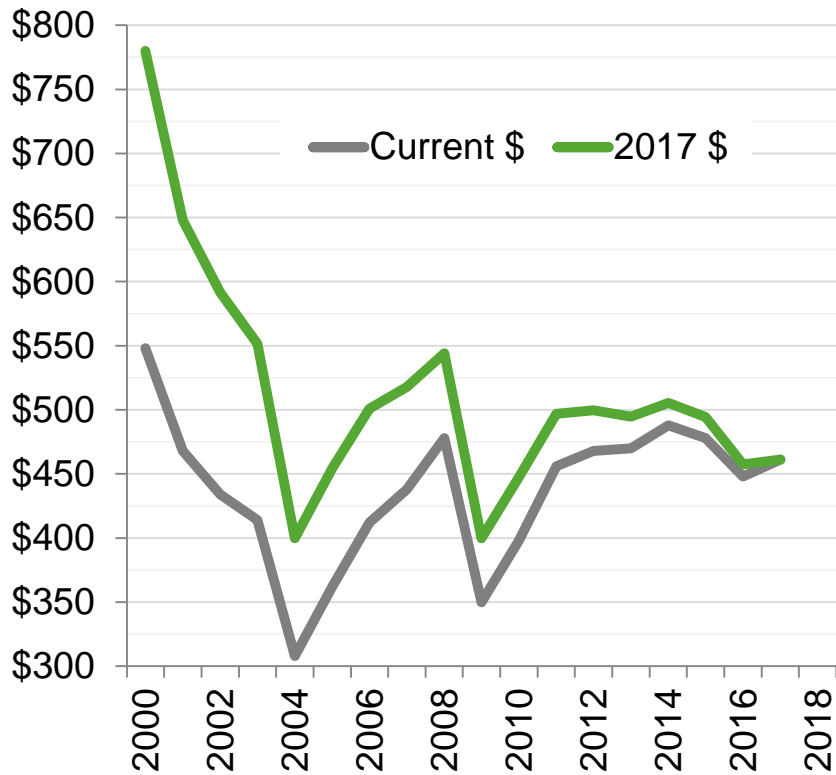


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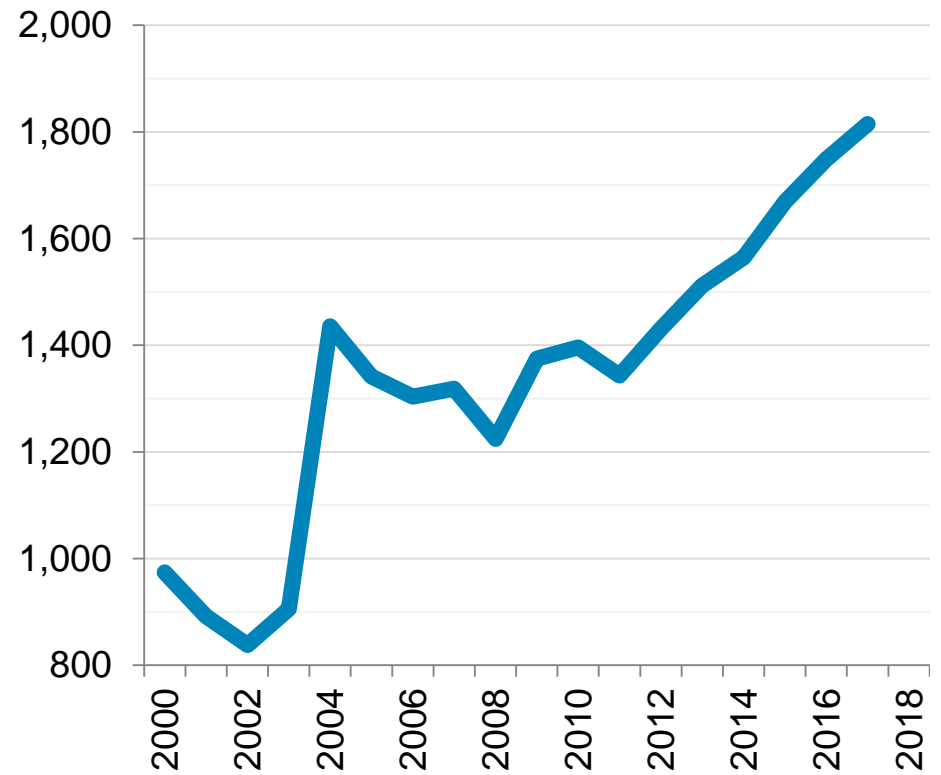
# Boston-Los Angeles\* Airfare Has Declined Materially

Traffic in the Popular Corridor Has Risen Sharply – Nearly Doubling From 2000-2017\*

### BOS-LAX\* Round-Trip Airfare



### BOS-LAX\* Daily O&D Passengers (Each Way)



Source: DOT Data Bank 1B (Passenger Origin-Destination Survey) via Diio Mi

\* BUR/LAX/LGB; 2017 based on 4Q16-3Q17; 85% of BOS-LAX passengers fly nonstop

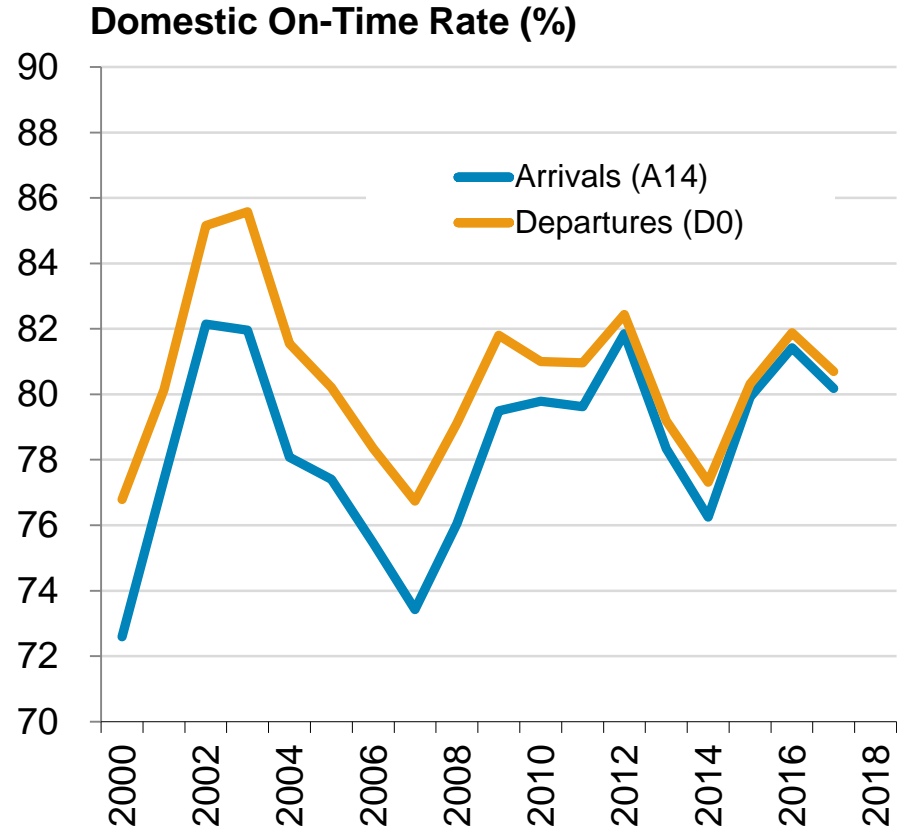
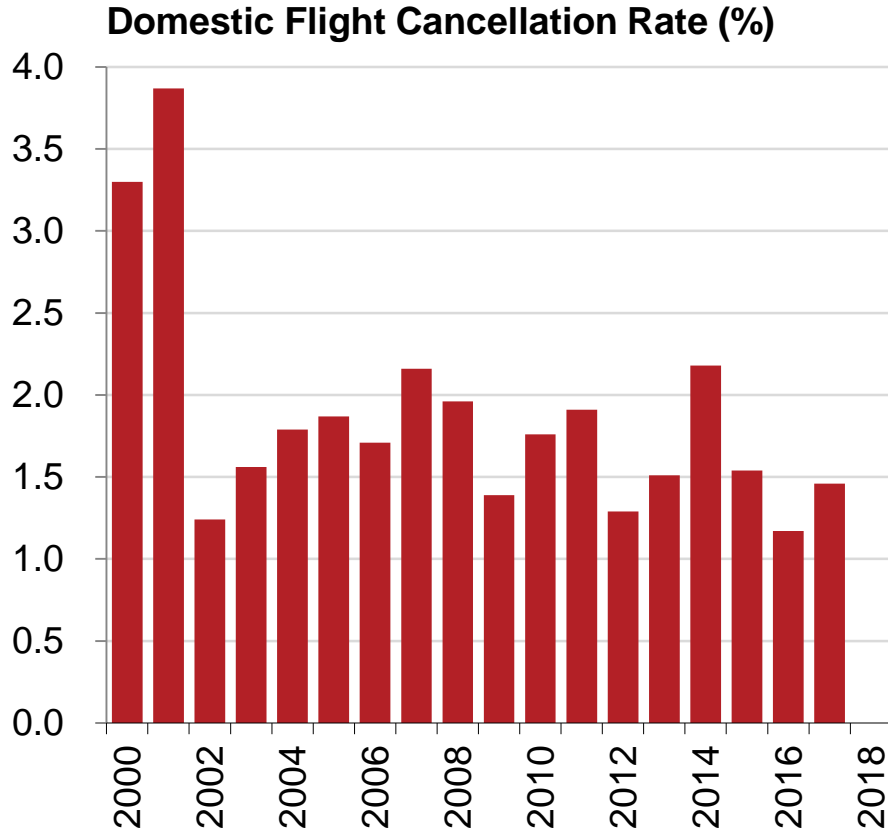


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# U.S. Airlines: Domestic Flight Operations Performance

2000-Present



Source: Bureau of Transportation Statistics

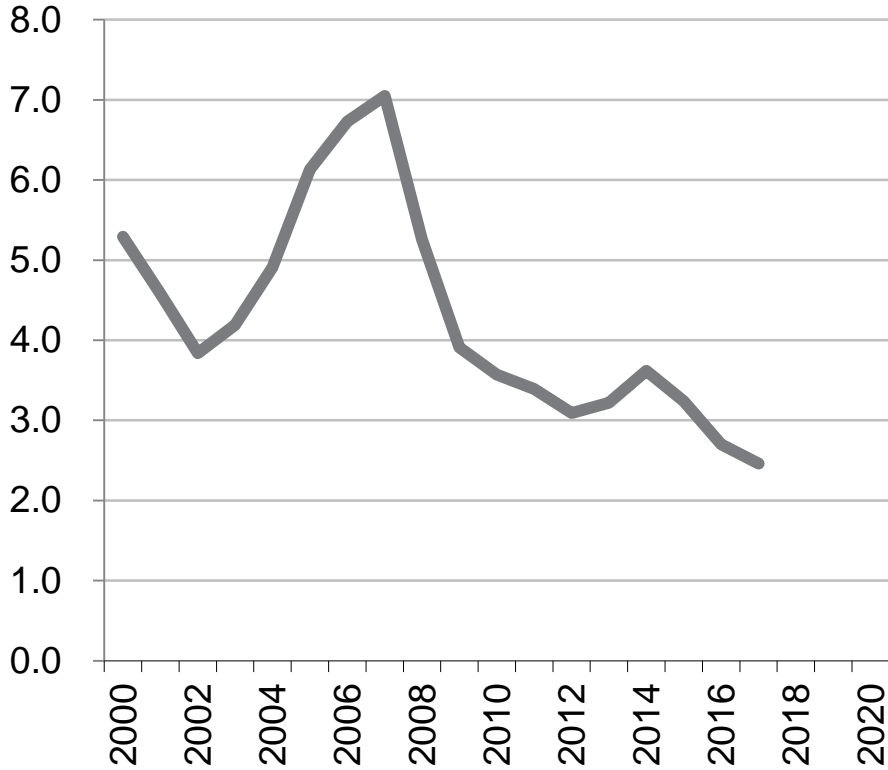


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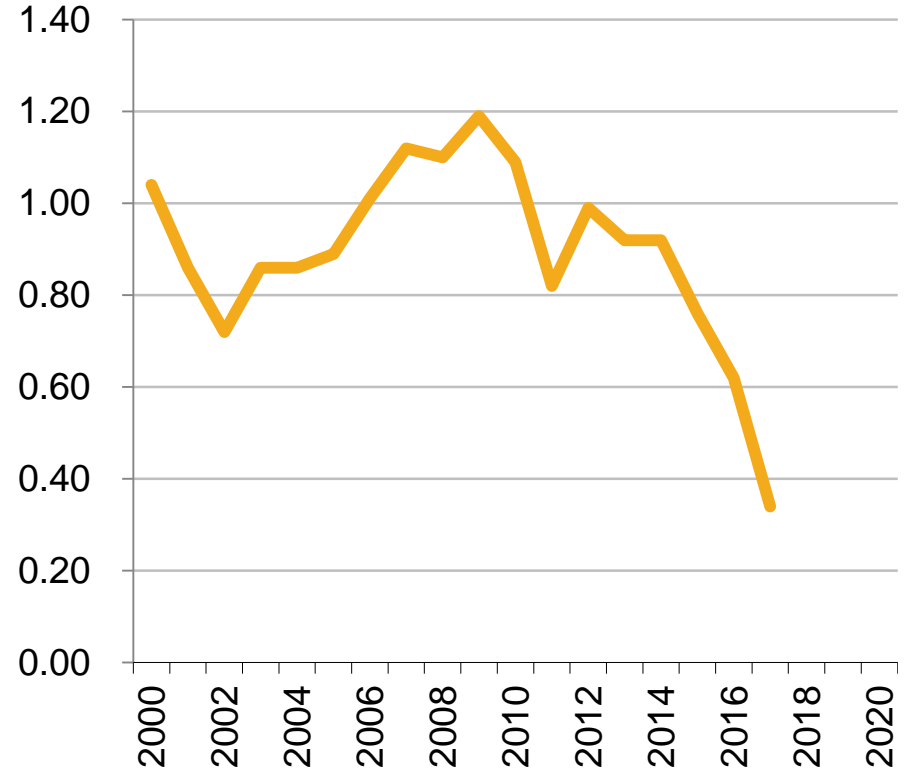
# U.S. Airlines: Domestic Customer Service Performance

2000-Present

### Mishandled Bag Reports per 1,000 Pax



### Involuntary Denied Boardings per 10,000 Pax

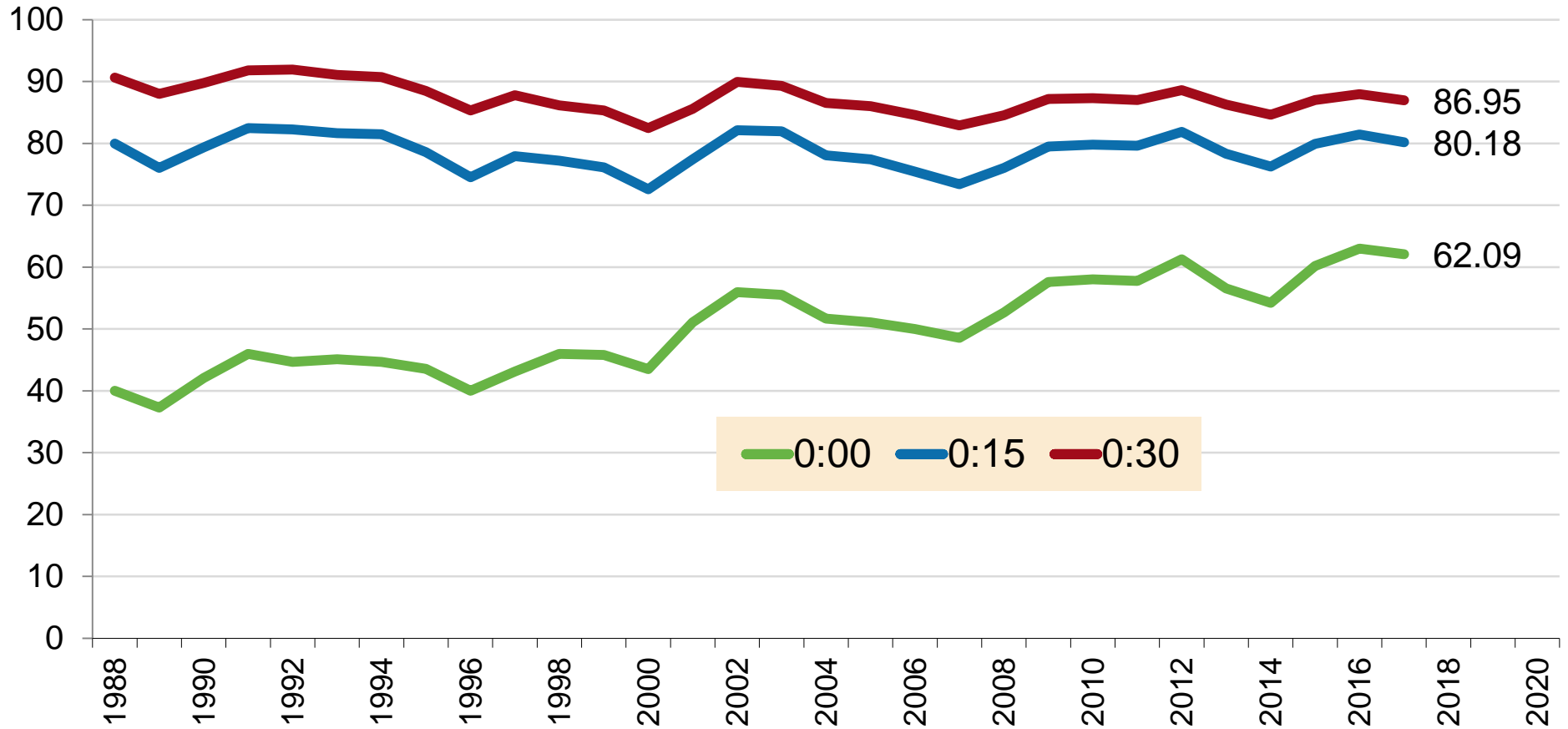


Source: DOT Air Travel Consumer Report



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# The Share of Flights Arriving Early or on Schedule Has Risen Steadily Over the Past Few Decades, Whereas On-Time 0:15 and 0:30 Have Been Relatively Flat



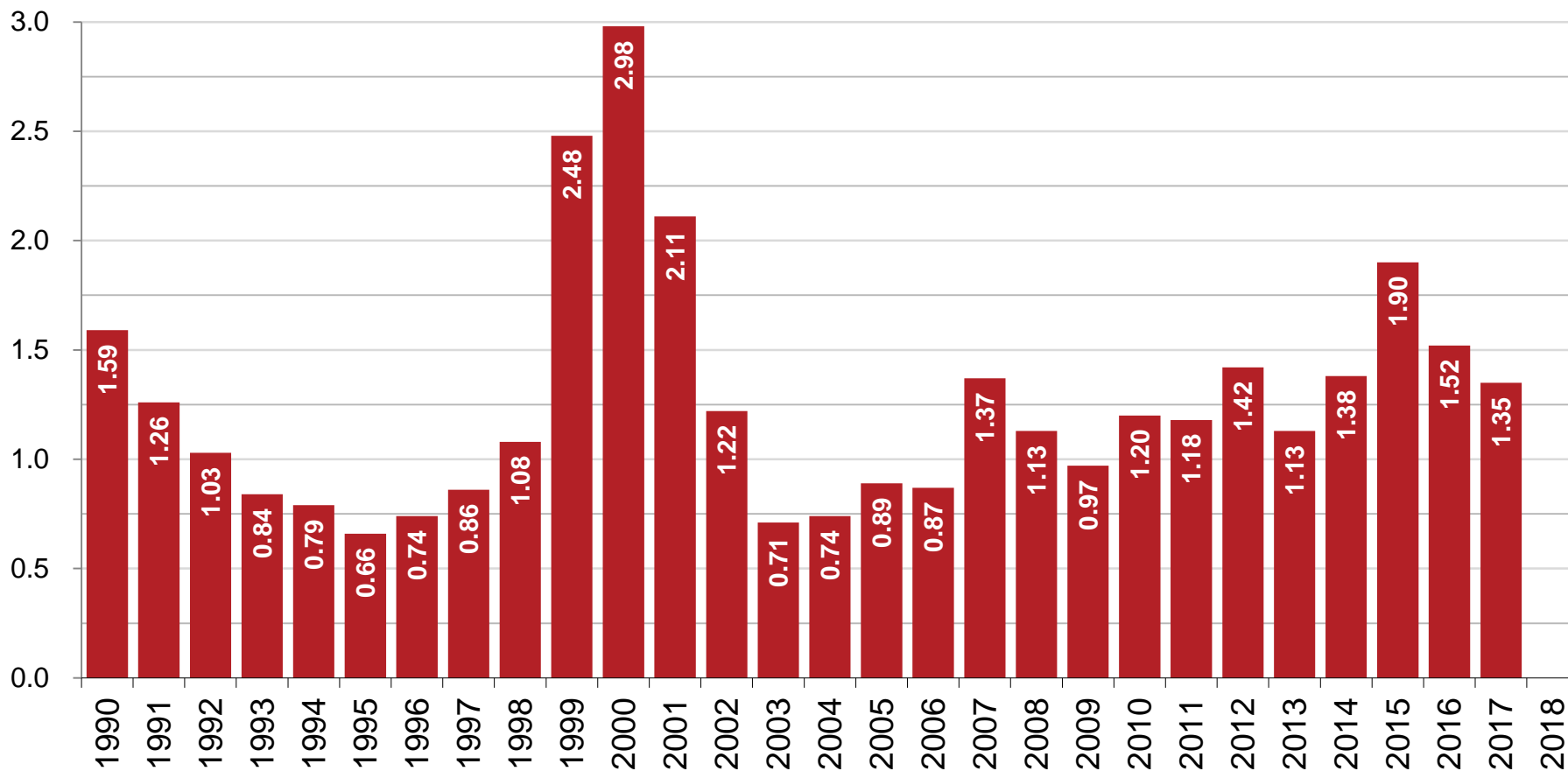
Source: Bureau of Transportation Statistics



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# U.S. Airlines: Customer Complaints per 100,000 Passengers Enplaned Systemwide

DOT Annual Rates: 1990-Present



Source: DOT Air Travel Consumer Report

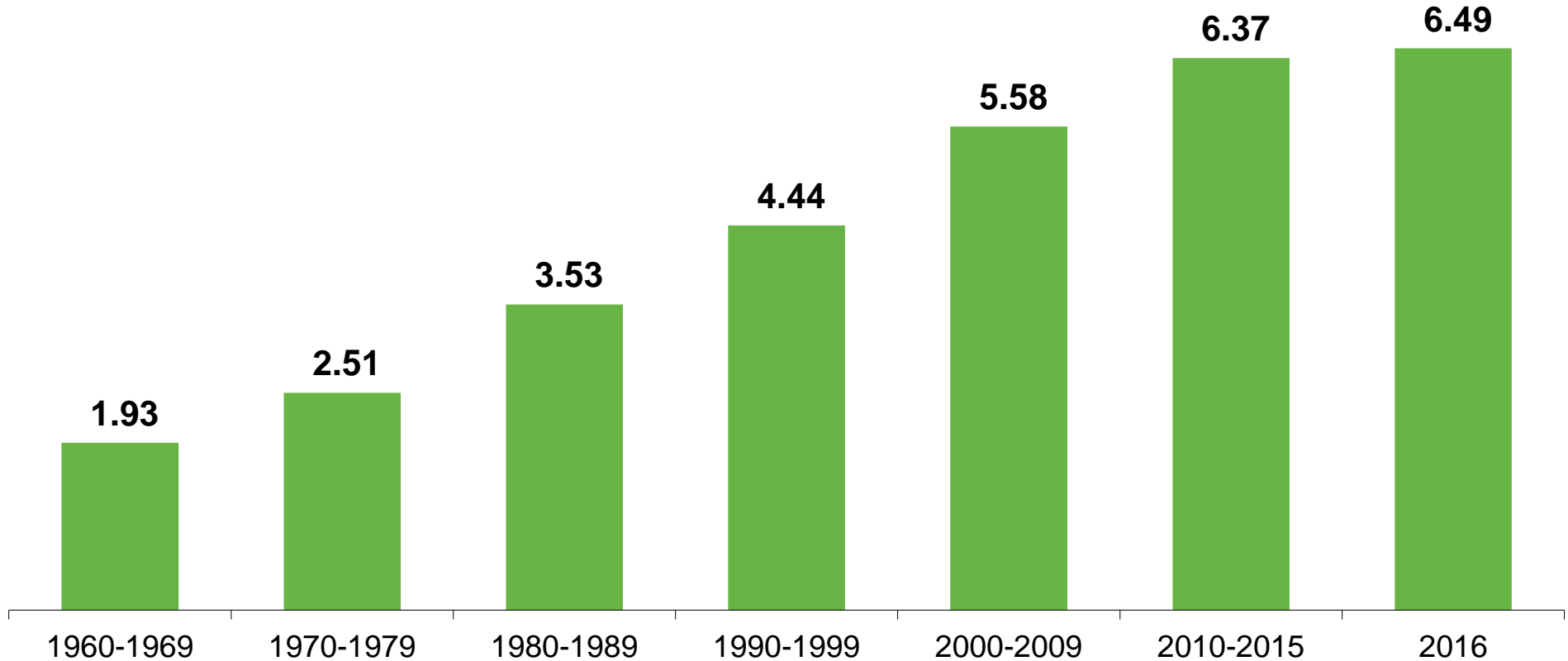


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# With Each Decade, U.S. Airline Fuel Efficiency Has Improved

Up More Than 120% from 1978 to 2016, More Than 30% from 2000 to 2016

Revenue Ton Miles\* Flown per Gallon



Source: A4A and BTS, for all U.S. passenger and all-cargo airlines

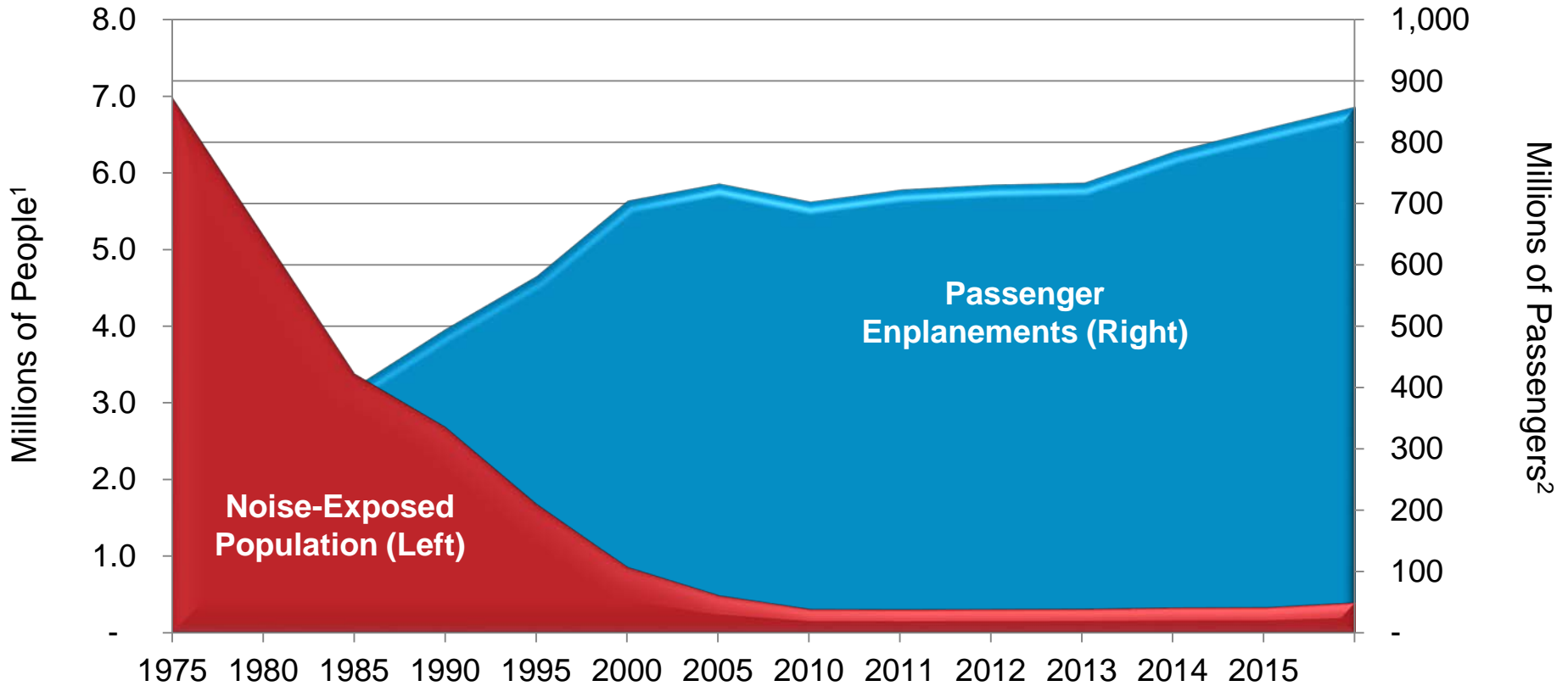
\* An RTM is a single ton of payload (passengers or cargo) carried one mile in revenue service



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# Commercial Aviation Has Gotten Markedly Quieter

From 1975-2016, the Number of U.S. Residents Exposed to Significant Aircraft Noise Fell 94% While Enplanements Rose 325%); 53% from 2000-2016 (Enplanements Rose 22%)



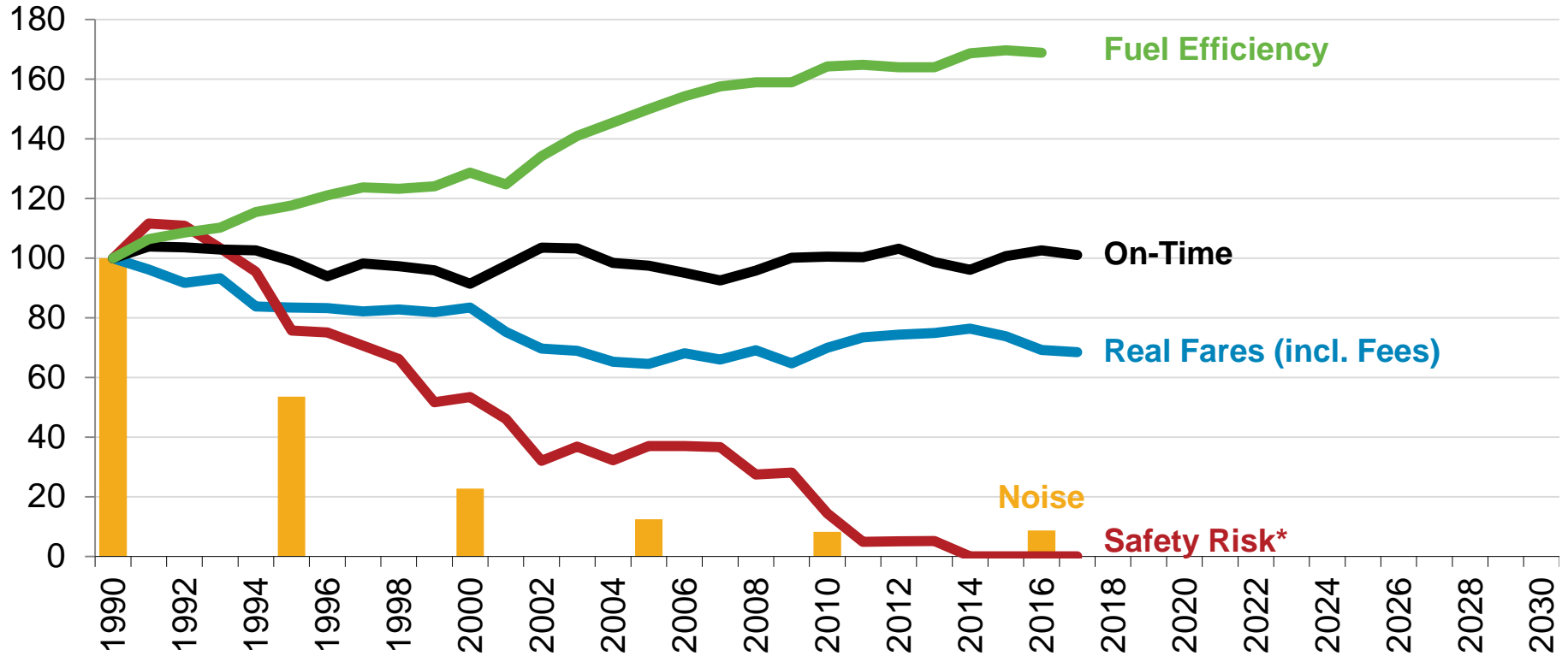
1. U.S. residents exposed to significant (65 dB DNL) noise levels from all aviation operations within U.S. airspace
2. Passengers enplaned on U.S. and foreign flag carriers as captured in the FAA Terminal Area Forecast (TAF)



# The Value Proposition for U.S. Air Travelers Is Alive and Well

It's Safer, It's Greener, It's Quieter, It's ~80 Percent On-Time and It's Still a Bargain

Index (1990 = 100)



\* Five-year-moving-average fatal accident rate for U.S. air carriers operating under 14 CFR 121 scheduled service





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