



Regional Airline Association

The evolution of code sharing...a passenger perspective

*NTSB Airline Code Sharing Symposium
October 26-27, 2010*





Who are the regional airlines...

“Regional airlines are the major leagues. At any given moment, there are nearly 5,000 flights in the national airspace.”

NTSB Chair Deborah Hersman

at the RAA Annual Convention in
Milwaukee May 2010





RAA Member Airlines



- **31 member airlines** (2 international, 1 on-demand)
- **Provide *the only* scheduled service to 496 of 653 airports** with commercial service (74%)
- **Fly *more than half* of the scheduled flights in the United States** (52%)
- **Serve more than 159 million passengers**
- **Employ 52,000 airline professionals**



Regional Airlines – Then

1980





“Big airlines” saw it coming...

“ If deregulation is to succeed, it will take the commuters to do it...Commuter airlines will play an increasing role in connecting main street to the business world and are making a great contribution to our country.”

Harding Lawrence

Braniff International

Speaking at a Commuter Airline Association of America meeting in 1979



As did government leaders...

“ I believe that the time has now come for the commuter airlines to become full participants in the nation’s air transportation system. As president of the United States, I will continue to support your efforts to achieve this objective.”

Governor Jimmy Carter

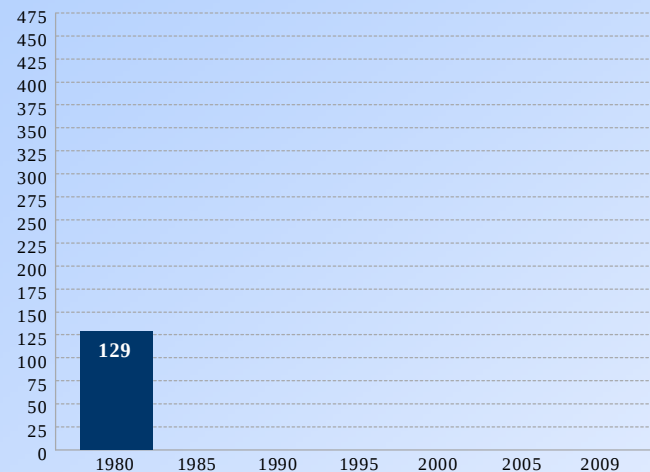
in an October 15, 1976 letter to CAAA President Thomas Miles



Regional Airline Industry Stats 1980-2009

Average Passenger Trip Length

miles

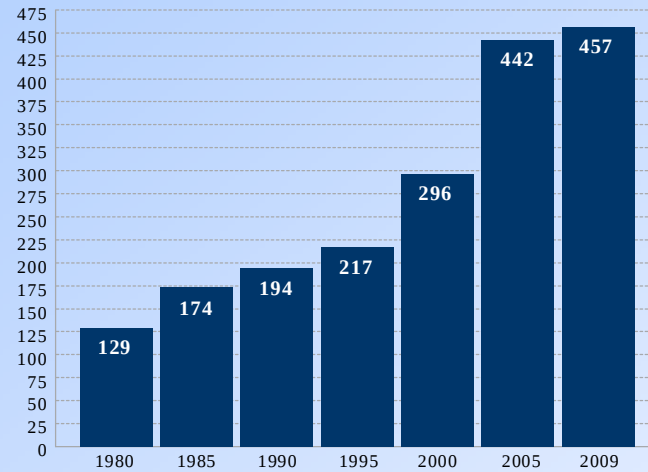




Regional Airline Industry Stats 1980-2009

Average Passenger Trip Length

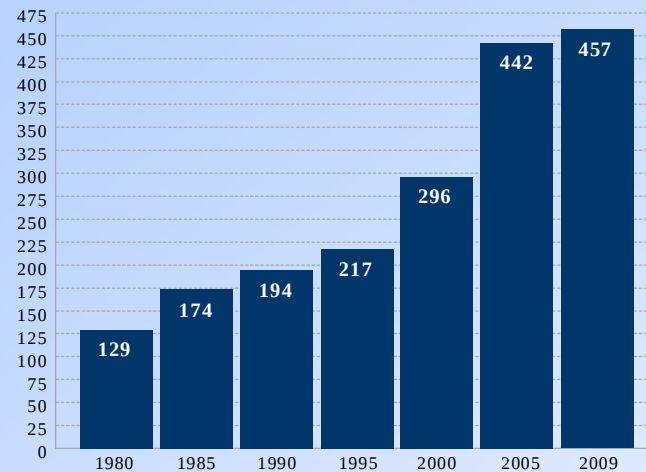
miles



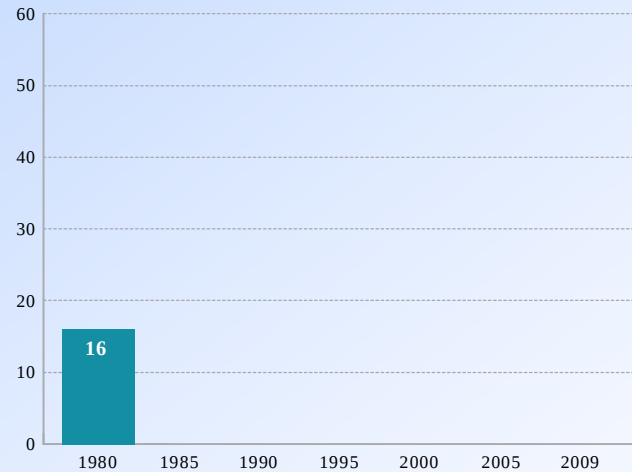


Regional Airline Industry Stats 1980-2009

Average Passenger Trip Length
miles



Average Seating Capacity

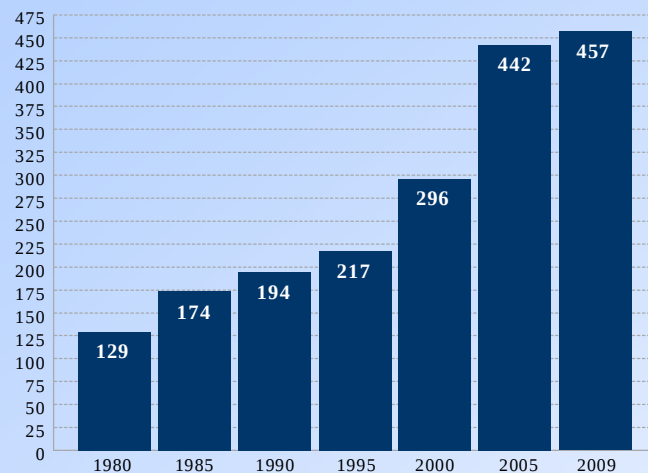




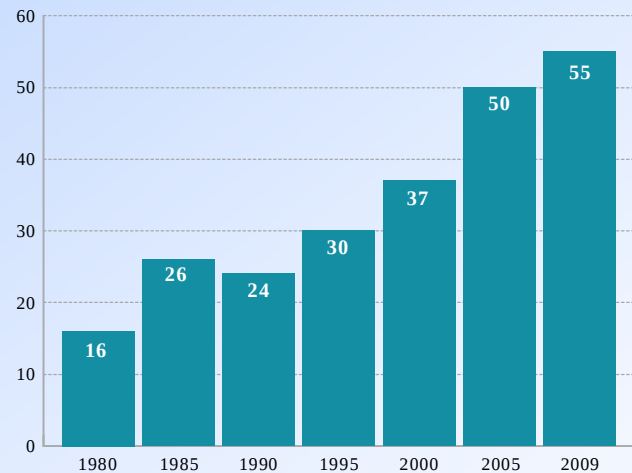
Regional Airline Industry Stats 1980-2009

Average Passenger Trip Length

miles



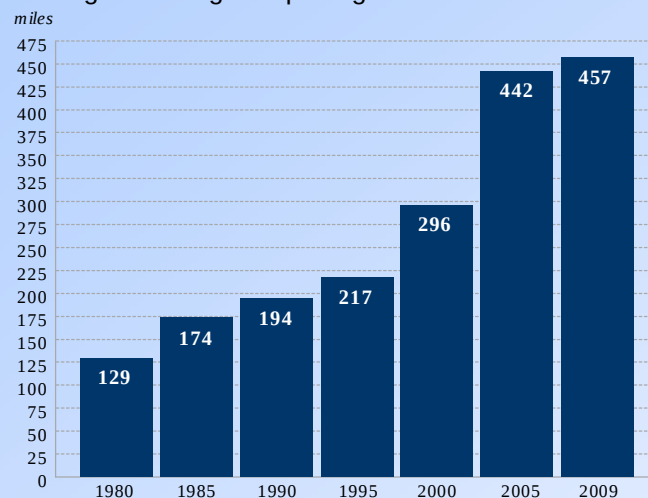
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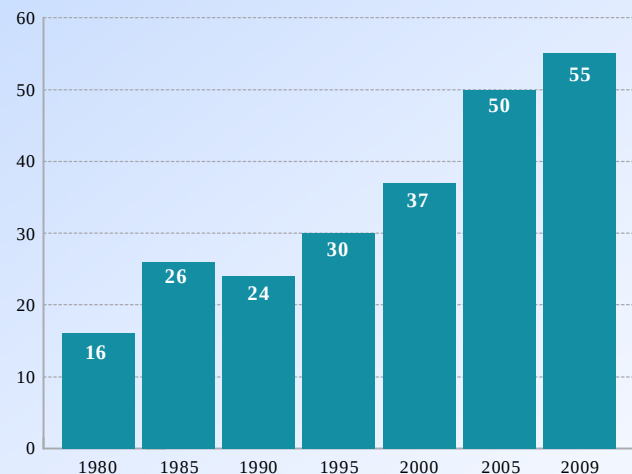


Regional Airline Industry Stats 1980-2009

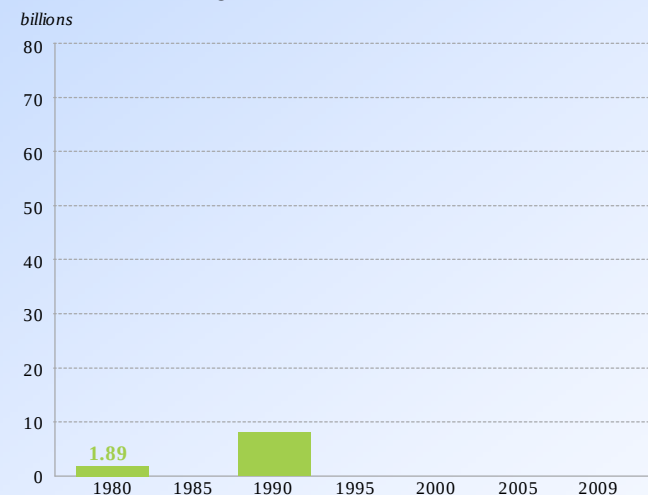
Average Passenger Trip Length



Average Seating Capacity



Revenue Passenger Miles



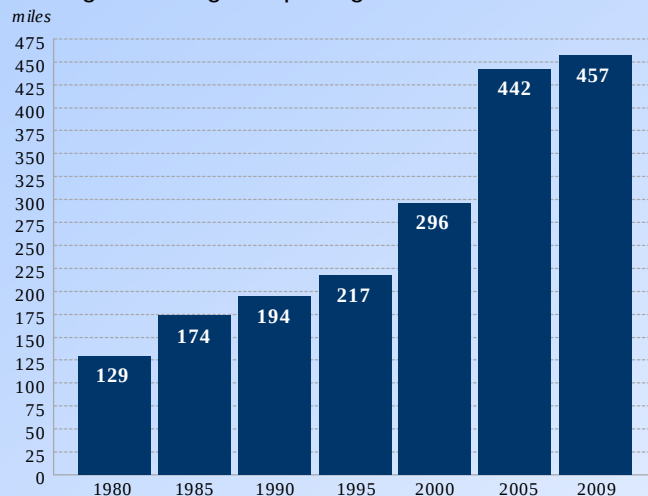
Passengers



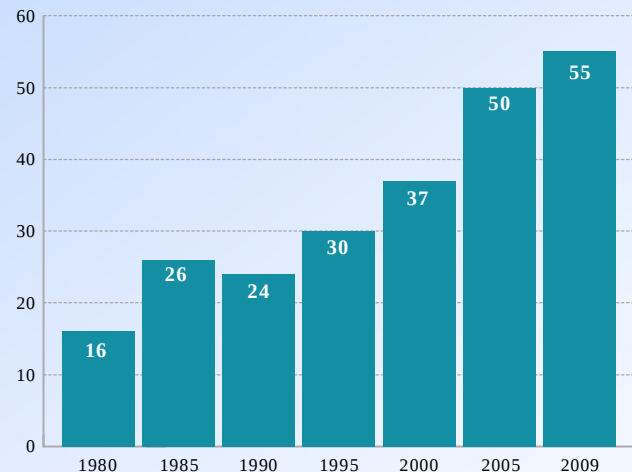


Regional Airline Industry Stats 1980-2009

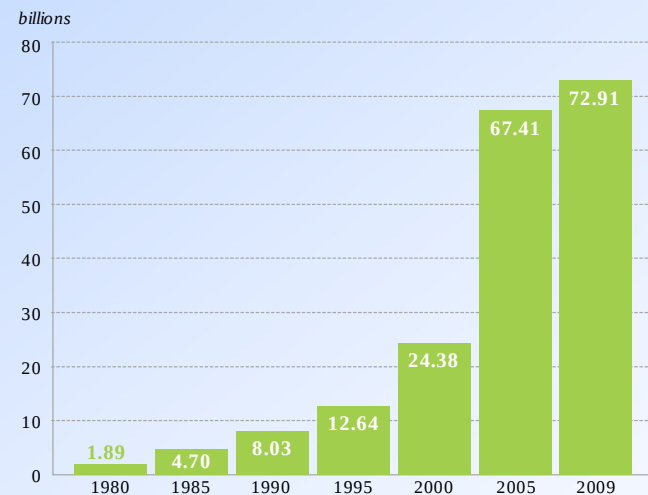
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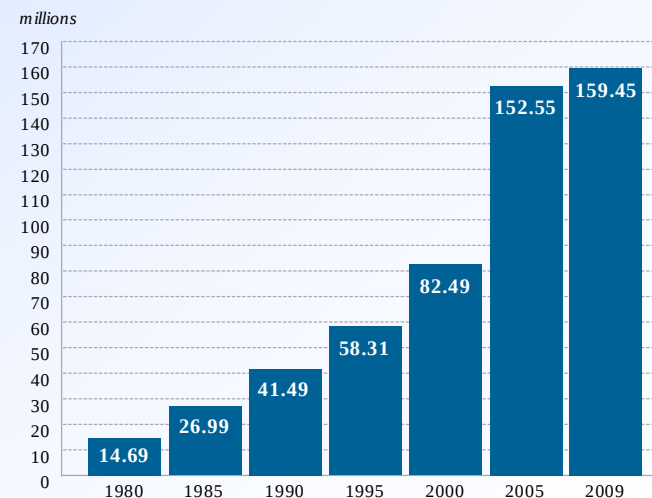
Average Seating Capacity



Revenue Passenger Miles



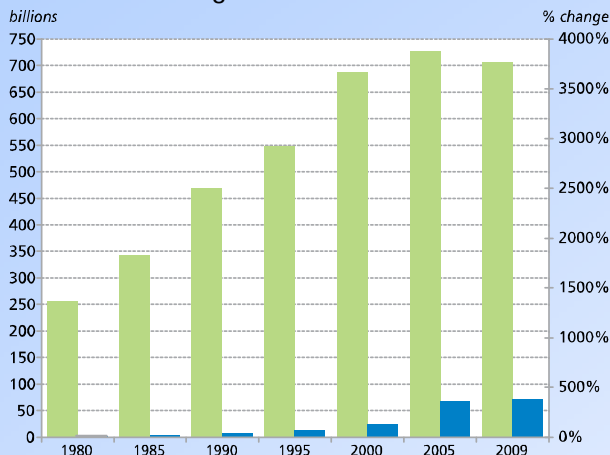
Passengers



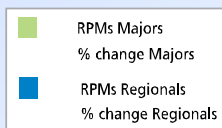
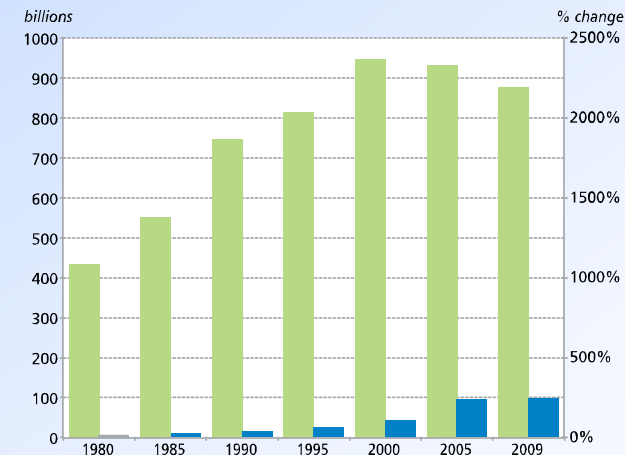


Major/Regional Share of Airline Service 1980-2009

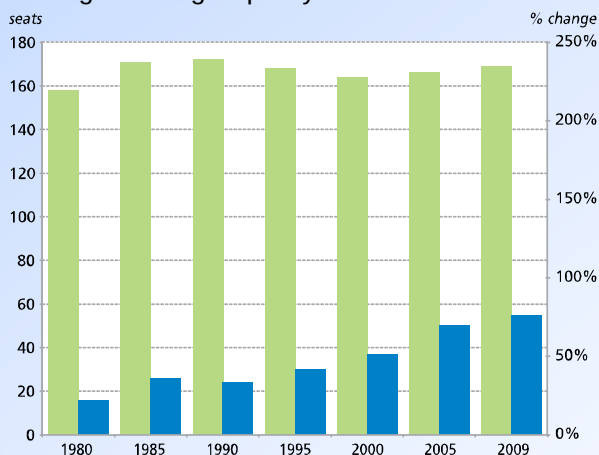
Revenue Passenger Miles



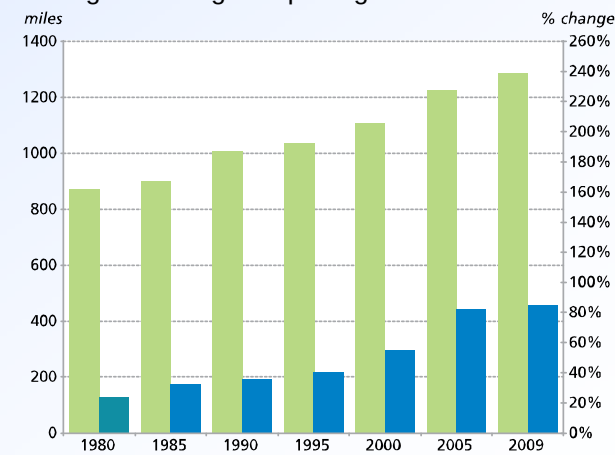
Available Seat Miles



Average Seating Capacity



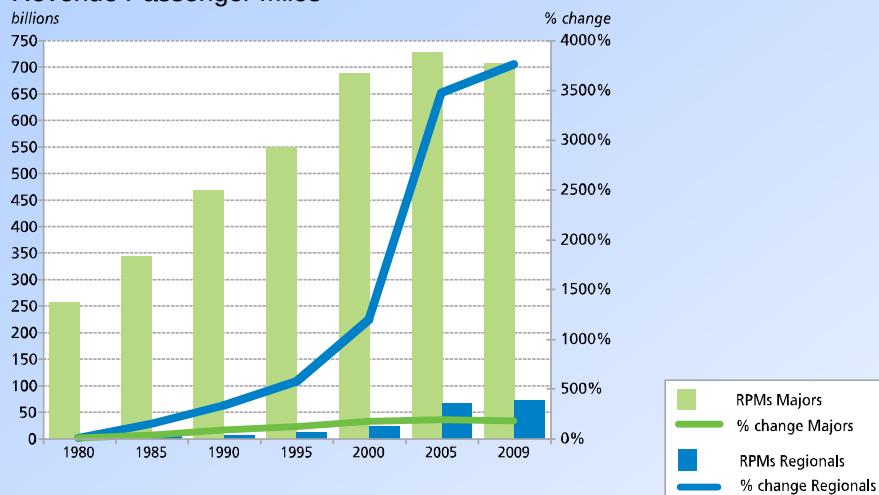
Average Passenger Trip Length



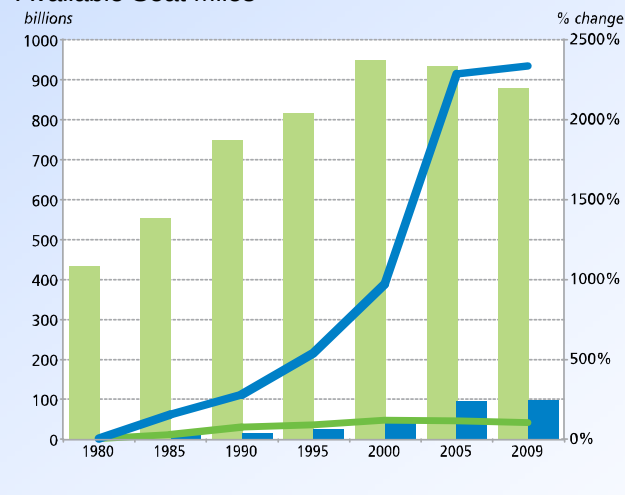


Major/Regional Share of Airline Service 1980-2009

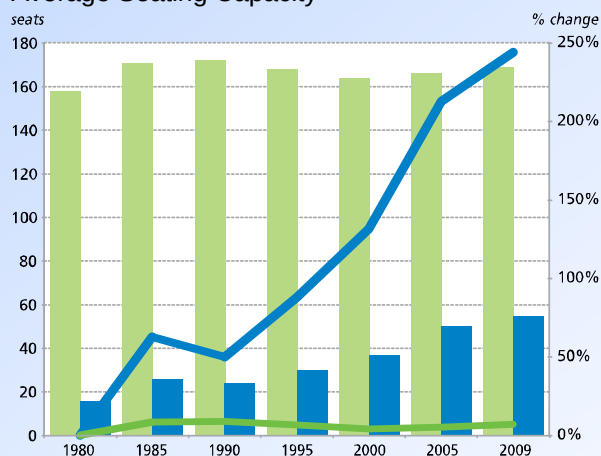
Revenue Passenger Miles



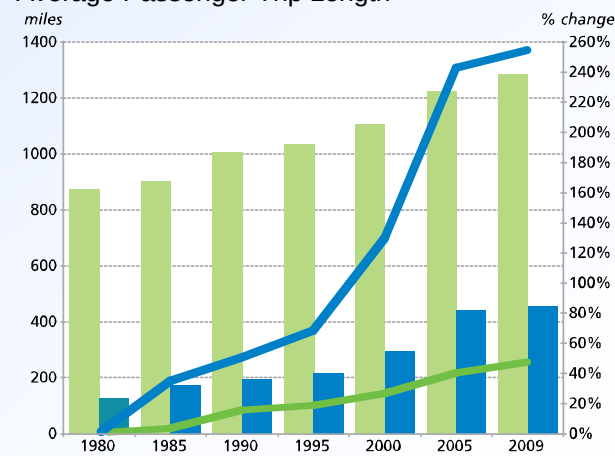
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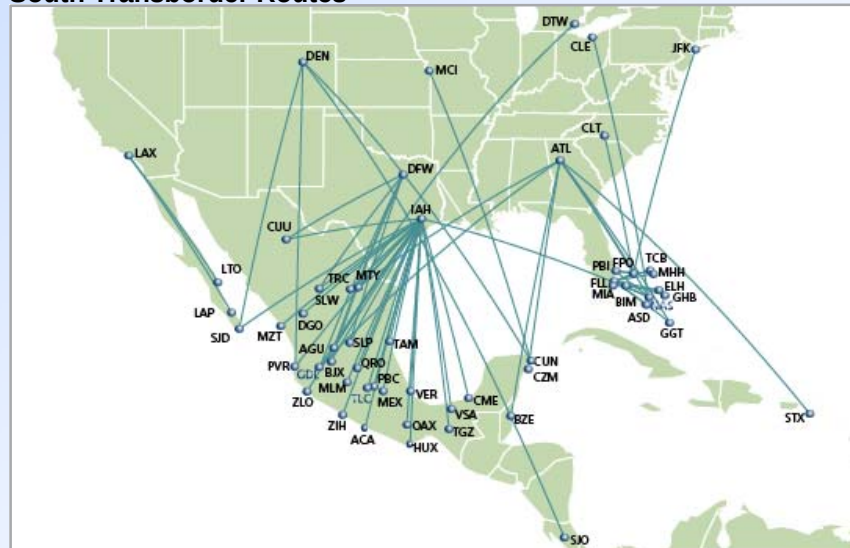


Regional Airline International Service (as of July 2010)

North Transborder Routes



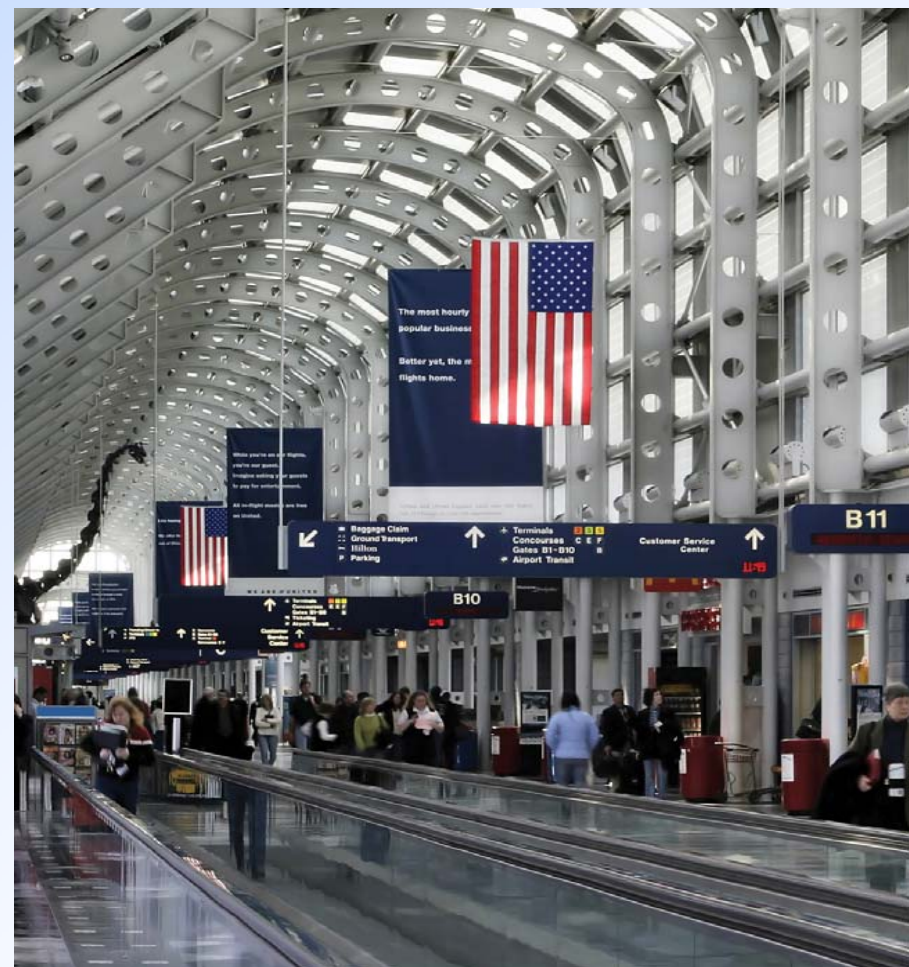
South Transborder Routes

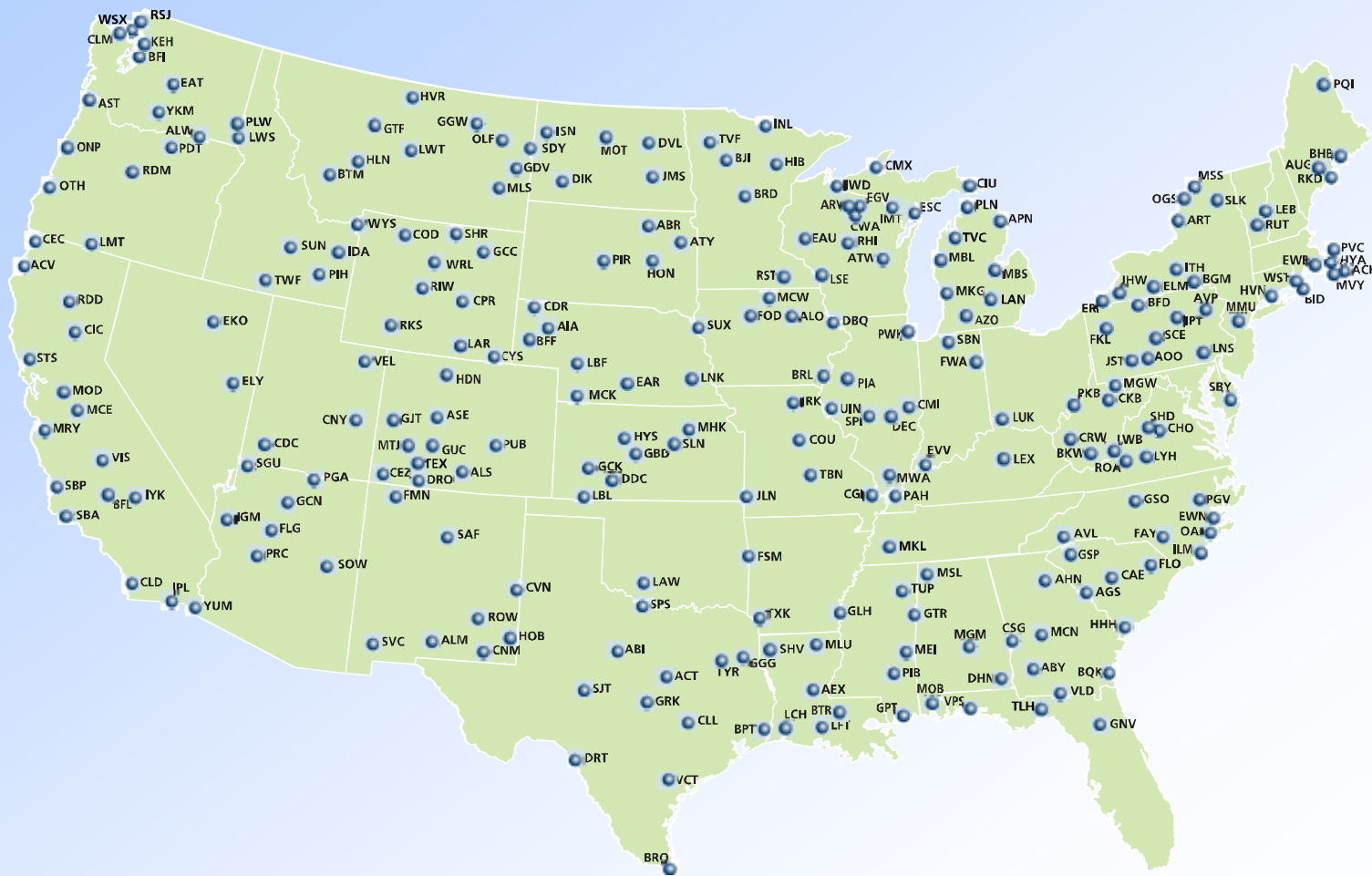




Regional Service at the 10 busiest US airports

- Atlanta 39%
- Chicago O'Hare 60%
- Denver 45%
- Dallas/Ft. Worth 37%
- Los Angeles 25%
- Houston 57%
- Charlotte 57%
- Detroit 61%
- Philadelphia 54%
- Minneapolis 54%







**The System we have developed:
one ticket to take passengers anywhere in the world**



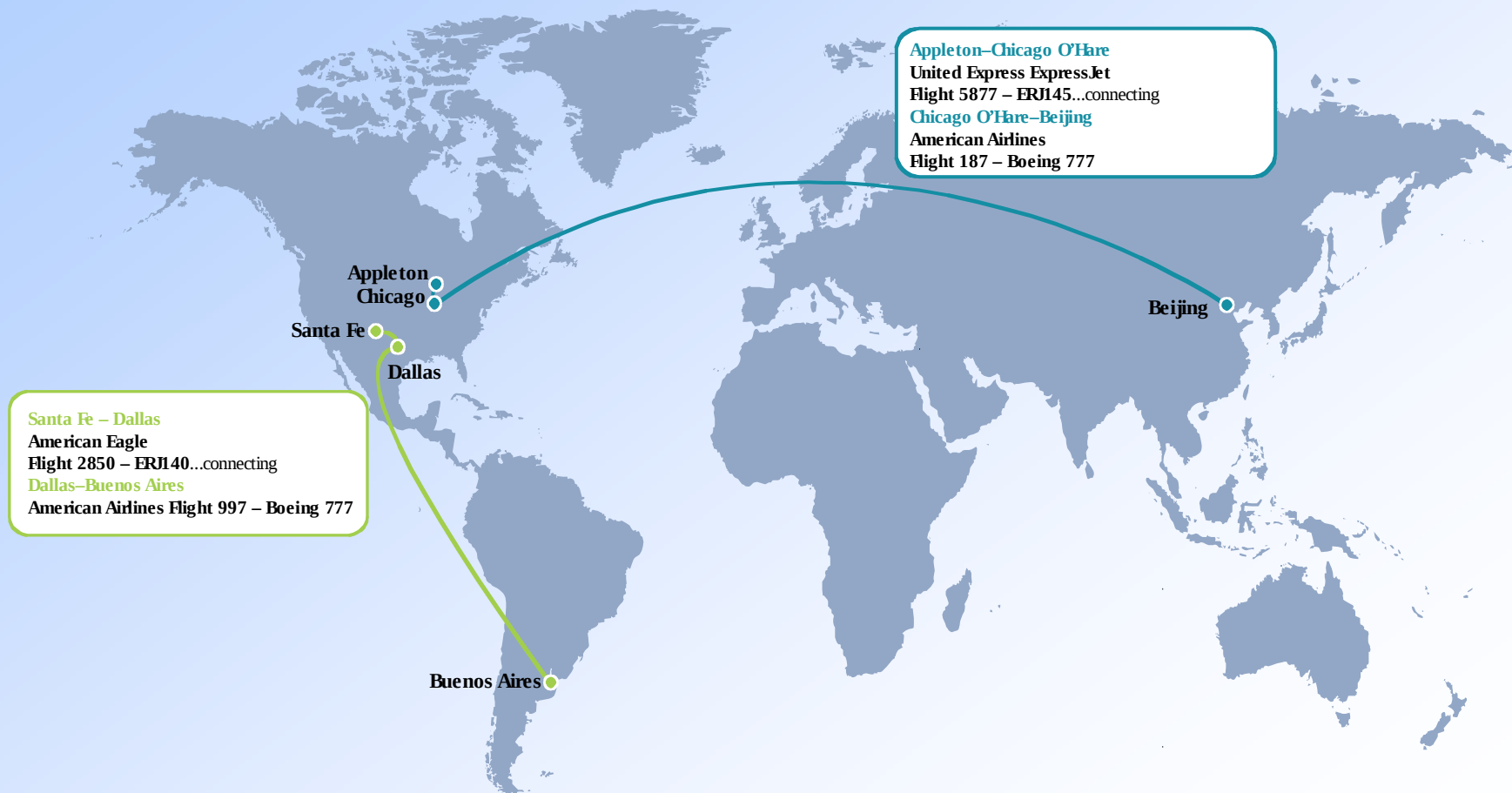


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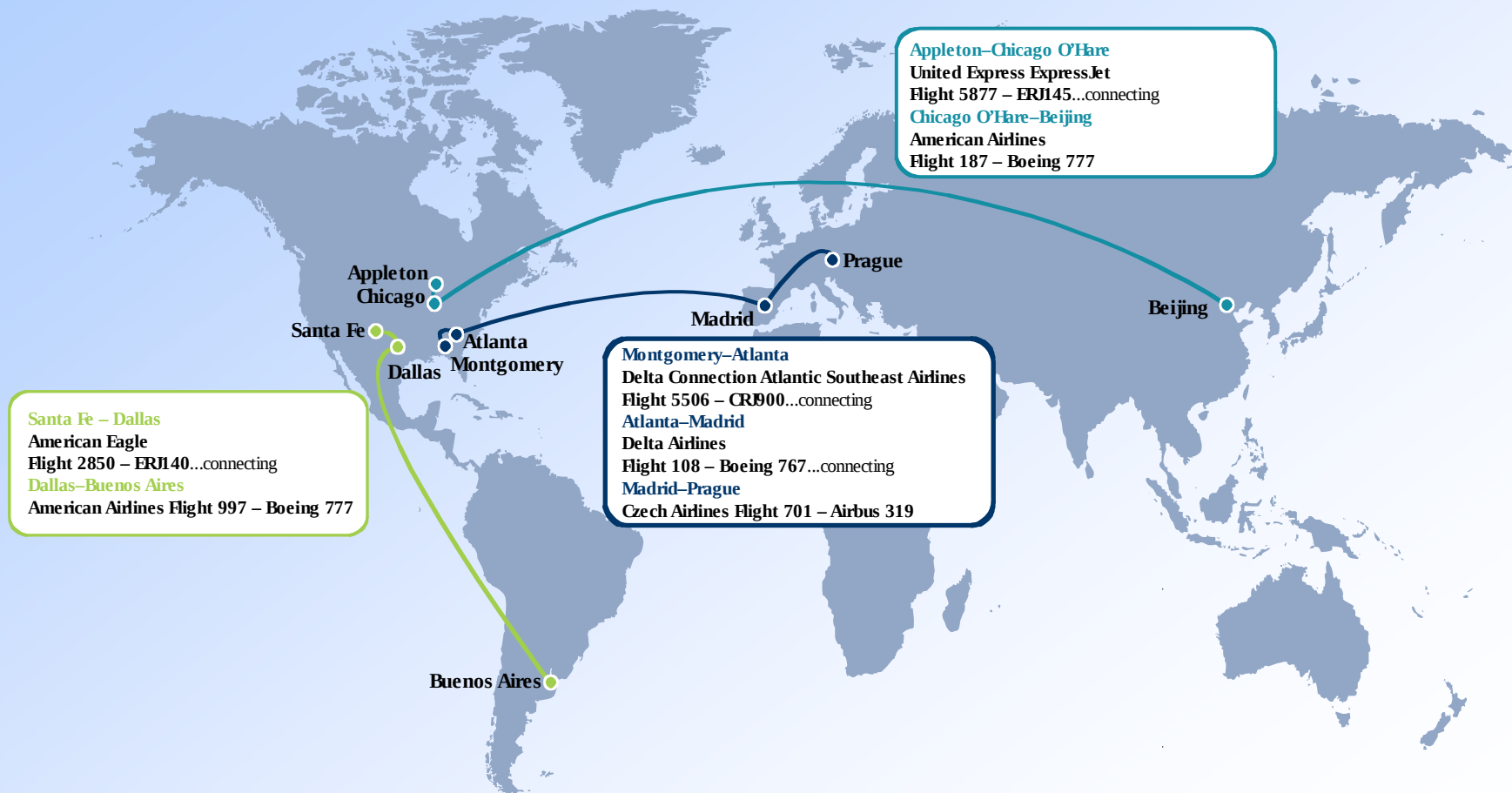


The System we have developed: one ticket to take passengers anywhere in the world





The System we have developed: one ticket to take passengers anywhere in the world





Regional Partnerships – Now 2010

Mainline Carrier	Regional Brand	Operating Partners	Mainline Carrier	Regional Brand	Operating Partners
Alaska Airlines 	N/A	Horizon Air	Frontier Airlines 	N/A	Great Lakes
		Peninsula Airways			Lynx Aviation
					Republic Airlines
AirTran Airways 	N/A	Skywest Airlines	jetBlue Airways 	N/A	Cape Air
American Airlines 	American Eagle	American Eagle	Midwest Airlines 	Midwest Connect	Chautauqua Airlines
	American Eagle/Executive	American Eagle/Executive			Republic Airlines*
	American Connection	Chautauqua Airlines			Frontier Airlines
Continental Airlines 	Continental Express	Chautauqua Airlines	United Airlines 	United Express	Atlantic Southeast
		ExpressJet			Colgan Air
	Continental Connection	Cape Air			ExpressJet Airlines
		Colgan Air			GoJet Airlines
		CommutAir			Great Lakes
		Gulfstream International Airlines			Mesa Airlines
Delta Air Lines 	N/A	Atlantic Southeast Airlines	US Airways 	US Airways Express	Air Wisconsin
		Chautauqua Airlines			Chautauqua Airlines
		Comair			Colgan Air
		Compass Airlines			Mesa Airlines
		Mesaba Airlines			Piedmont
		Pinnacle Airlines			PSA
		Shuttle America			Republic Airlines
		SkyWest Airlines			Trans States Airlines



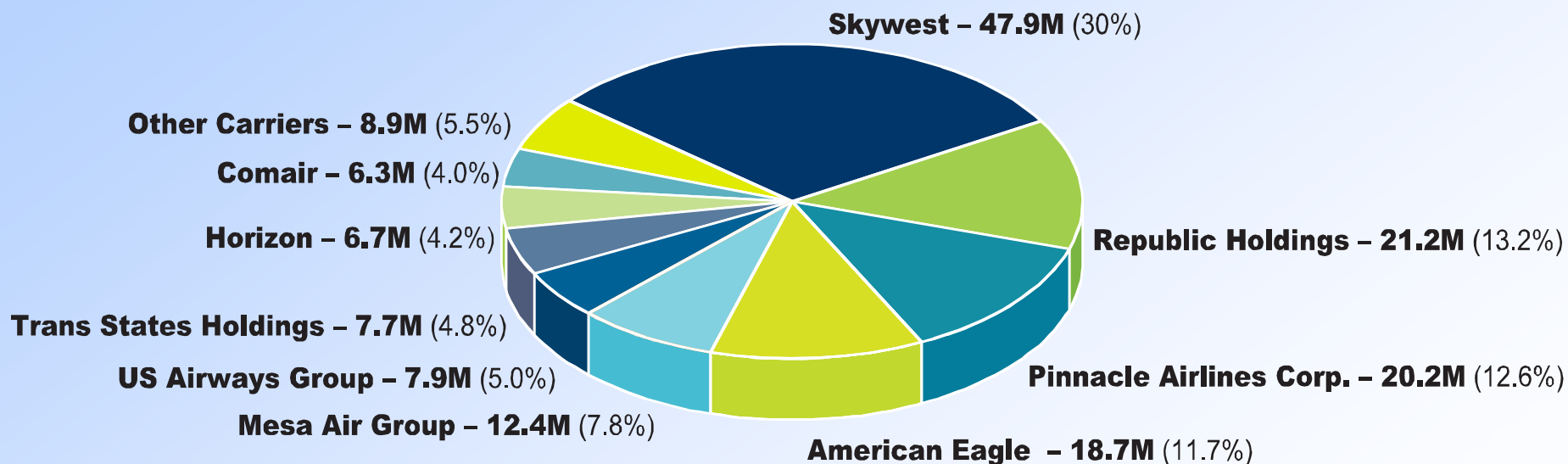
The traveling experience for the passenger...

	1980	2010
Modern aircraft	NO	YES
Seamless service with majors	NO	YES
Coordinated schedules	NO	YES
Baggage check	NO	YES
One level of Safety	NO	YES



Not your father's regional airlines...

Passengers enplaned (percent of total regional traffic activity)



Top 20 airlines fly 99% of regional passengers

One Industry – One Level of Safety

1:30 pm - 4:00 pm Room 203C
Joint ATA/RAA Security Council Meeting
(Open to RAA Security Directors and ATA Security Council only)

noon - 4:30 pm Room 202
RAA Inflight Committee (See AGENDA pg 17)
(Open to airlines and guests)
Lunch sponsored by Pratt & Whitney Canada



Safety Successes

Voluntary safety programs-RAA Members

ASAP	100%
FOQA	98%
ASIAS	93%
DOD	99%
VDRP	100%
IEP	99%
LOSA	81%
AQP	85%

Percent of regional airline pax flying on airlines with voluntary safety programs (active/pending approval). RAA members only. Oct.2010



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SAFE

PROFESSIONAL

RELIABLE

On-time	Detroit	American Eagle	4963	9:39A	F1A	On-Time	India
On-time	Detroit	Pinnacle	6022	7:24A	A27	On-Time	India
On-time	Des Moines	United	9659	11:20A	G1A	On-Time	Sou
On-time	Duluth	Frontier	4291	7:58A	F2D	On-Time	Mus
On-time	Denver	American Eagle	7485	6:17A	F2C	On-Time	La
On-time	Dubuque	GoJet	6618	8:35A	F5	On-Time	Ind
On-time	Dayton	Skywest	7533	6:07A	G14	On-Time	Inc
On-time	Dayton	US Airways	3760	6:18A	C3	On-Time	Ka
On-time	Detroit	Air Wisconsin	5785	9:39A	F1A	On-Time	In
On-time	Detroit	Expressjet	6022	7:24A	A27	On-Time	In
On-time	Des Moines	United	9659	11:20A	G1A	On-Time	
On-time	Duluth	Frontier		7:58A			