

## **Special Feature**

### **New Top-1,000 City-Pair Markets**

Each quarter as new markets move into the top 1,000 the list of markets covered by this report grows. Once a city-pair is ranked within the top 1,000 it becomes a permanent addition to the data presented. We have done this to provide users of the data with continuity when tracking fare or traffic data in specific markets. In this quarter's Domestic Airline Fares Consumer Report, 1241 city-pairs are listed.

One reason that some city-pairs move into (and out of) the top 1,000 is seasonality. Nantucket- New York City provides one such example. In the third quarter of 1999, traffic on seasonal flights between the two points was extensive enough to move the market into the 944<sup>th</sup> spot for that quarter. For the remainder of the year, there was little reported O&D traffic between the two points. There are other markets, however, that move into higher ranking spots on the top-1,000 list and appear there consistently. This special feature examines the 66 city-pairs that have appeared in the list of top-1,000 U.S. domestic markets for the first time since the first quarter of 1998.<sup>1</sup> For each market, traffic and fare data is presented for both this quarter and the same quarter in 1997. City-pairs are listed according to the 3<sup>rd</sup> quarter 1999 passenger ranking. Also included is information about carriers providing service in city-pairs in the 3<sup>rd</sup> quarter 1999 that were not in the market in the same quarter of 1997.

- Low-fare carriers entered 37 of 66 markets, or 57% of the newly ranked city-pairs.
- Traffic growth in the markets with no new entrant is due to service increases either by an incumbent network or low-fare carrier.
- Only three of the 66 markets received new service solely from major network carriers. In all three instances, traffic and fares both increased. None of the three markets were ranked within the top-1000 in 3<sup>rd</sup> quarter 1999.
- Low-fare entry has traditionally centered on dense point-to-point markets. However, Southwest chose Baltimore-Manchester, a small city-pair with only 32 local O&D passengers each day, and turned it into the 91<sup>st</sup> largest market in the U.S with low fares and plentiful frequencies.
- With few exceptions, traffic growth in the most successful of the newly-ranked city-pairs was stimulated by large fare declines. Southwest and Airtran are the new entrants that appear most frequently in city-pairs with a dramatic rise in passenger O&D ranking.

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<sup>1</sup> The first quarter of 1998 was chosen as a benchmark period because it was the first quarter in which new Origin & Destination reporting standards were implemented.

**Special Feature  
Third Quarter 1999**

**City-Pairs that Have Entered the Top-1000 Since First Quarter 1998**

Origin	Destination	99/3 Rank	New Carrier(s)			97/3	99/3	% Change	97/3	99/3	% Change
			Since 97/3	Mkt Share 99/3		Pssgrs/Day	Pssgrs/Day		Avg Fare	Avg Fare	
BALTIMORE, MD	MANCHESTER, NH	91	WN	65%		32	1628	4918%	\$183	\$58	-68%
BALTIMORE, MD	ISLIP/LONG ISLAND, NY	324	WN	100%		42	644	1446%	\$174	\$59	-66%
CHICAGO, IL	ISLIP/LONG ISLAND, NY	382	WN	54%		114	557	387%	\$220	\$115	-48%
BALTIMORE, MD	RALEIGH/DURHAM, NC	422	WN	67%		149	510	242%	\$203	\$70	-66%
BALTIMORE, MD	OAKLAND, CA	631				152	327	115%	\$192	\$188	-2%
BALTIMORE, MD	SACRAMENTO, CA	704				173	283	63%	\$207	\$190	-8%
LOS ANGELES, CA	MANCHESTER, NH	721	WN NW	19%	16%	32	276	757%	\$376	\$187	-50%
RALEIGH/DURHAM, NC	ST. LOUIS, MO	722	WN	14%		151	275	82%	\$212	\$160	-25%
DALLAS, TX	GREENSBORO, NC	735	FL	8%		119	270	126%	\$302	\$194	-36%
CHARLOTTE, NC	SEATTLE, WA	738				154	268	74%	\$279	\$253	-9%
RALEIGH/DURHAM, NC	SEATTLE, WA	748	WN	6%		165	264	60%	\$278	\$196	-29%
ATLANTA, GA	GULFPORT, MS	751	FL	77%		169	263	56%	\$81	\$101	25%
KANSAS CITY, MO	SANTA ANA, CA	751				146	263	80%	\$167	\$151	-10%
PROVIDENCE, RI	SEATTLE, WA	765	WN	4%		87	257	196%	\$288	\$192	-33%
BUFFALO, NY	DALLAS, TX	795	FL NJ	8%	2%	150	248	65%	\$229	\$180	-21%
DETROIT, MI	OAKLAND, CA	847				93	225	141%	\$220	\$187	-15%
BUFFALO, NY	MINNEAPOLIS, MN	862	NJ	28%		91	222	144%	\$224	\$135	-40%
PHOENIX, AZ	RALEIGH/DURHAM, NC	874	WN	21%		120	216	81%	\$304	\$199	-35%
ATLANTA, GA	KNOXVILLE, TN	884	FL	37%		111	212	90%	\$177	\$98	-45%
CLEVELAND, OH	RALEIGH/DURHAM, NC	894	WN	33%		110	210	91%	\$201	\$155	-23%
DETROIT, MI	PROVIDENCE, RI	894	WN	28%		151	210	39%	\$257	\$249	-3%
DES MOINES, IA	NEW YORK, NY	899	ZA	23%		161	209	29%	\$263	\$219	-17%
HARTFORD, CT	LAS VEGAS, NV	901				139	208	50%	\$207	\$209	1%
FRESNO, CA	SEATTLE, WA	907				138	207	50%	\$122	\$126	3%
PITTSBURGH, PA	SAN DIEGO, CA	927				146	201	37%	\$262	\$232	-11%
DENVER, CO	GRAND RAPIDS, MI	944	TZ	3%		151	197	30%	\$163	\$166	2%
FT. MYERS, FL	ISLIP/LONG ISLAND, NY	944	NK	96%		46	197	325%	\$126	\$92	-27%
MANCHESTER, NH	PHOENIX, AZ	944	WN NW	25%	9%	58	197	240%	\$170	\$168	-1%
NANTUCKET, MA	NEW YORK, NY	944				85	197	131%	\$169	\$177	5%
BUFFALO, NY	LOS ANGELES, CA	950				152	196	29%	\$293	\$243	-17%
ALBUQUERQUE, NM	TUCSON, AZ	954	WN	71%		101	195	93%	\$94	\$65	-31%
ONTARIO, CA	ORLANDO, FL	954				146	195	34%	\$187	\$179	-4%
BIRMINGHAM, AL	WASHINGTON, DC	969				108	192	79%	\$229	\$151	-34%
DALLAS, TX	KNOXVILLE, TN	969	AA, FL	55%	6%	84	192	127%	\$239	\$145	-39%
PROVIDENCE, RI	RALEIGH/DURHAM, NC	983	WN	51%		77	190	146%	\$156	\$117	-25%
CINCINNATI, OH	ST. LOUIS, MO	997				97	186	92%	\$223	\$108	-52%
DES MOINES, IA	LOS ANGELES, CA	997	ZA	47%		74	186	151%	\$226	\$181	-20%
OKLAHOMA CITY, OK	SAN FRANCISCO, CA	997				129	186	44%	\$181	\$150	-17%

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Origin	Destination	99/3 Rank	New Carrier(s)		97/3 Pssgrs/ Day	99/3 Pssgrs/ Day	% Change	97/3 Avg Fare	99/3 Avg Fare	% Change
			Since 97/3	Mkt Share 99/3						
CLEVELAND, OH	MYRTLE BEACH, SC		CO	12%	76	184	142%	\$94	\$104	11%
BALTIMORE, MD	JACKSON, MS				118	183	55%	\$115	\$123	7%
NEW ORLEANS, LA	RALEIGH/DURHAM, NC		JI	49%	111	183	64%	\$141	\$135	-4%
RALEIGH/DURHAM, NC	SAN DIEGO, CA		WN	5%	114	183	61%	\$289	\$201	-30%
MEMPHIS, TN	MIAMI, FL		FL	5%	136	180	32%	\$166	\$155	-7%
PHILADELPHIA, PA	PROVIDENCE, RI				158	179	13%	\$253	\$259	2%
COLUMBUS, OH	SALT LAKE CITY, UT		WN	4%	153	177	16%	\$154	\$159	3%
FT. LAUDERDALE, FL	SEATTLE, WA		WN	17%	115	176	53%	\$224	\$225	0%
BALTIMORE, MD	RENO, NV		CO	2%	102	170	66%	\$174	\$175	1%
MANCHESTER, NH	TAMPA, FL		WN NW	26% 3%	89	169	89%	\$117	\$114	-3%
DENVER, CO	JACKSONVILLE, FL				113	165	47%	\$210	\$212	1%
HARTFORD, CT	NEW ORLEANS, LA		FL JI	2% 3%	122	165	35%	\$152	\$115	-24%
JACKSONVILLE, FL	ST. LOUIS, MO				139	161	16%	\$199	\$185	-7%
OKLAHOMA CITY, OK	WASHINGTON, DC				154	161	5%	\$219	\$196	-11%
ATLANTIC CITY, NJ	WEST PALM BEACH, FL		NK	100%	1	151	15000%	\$100	\$106	6%
CHARLOTTE, NC	PHOENIX, AZ				111	151	37%	\$271	\$259	-4%
DENVER, CO	MEMPHIS, TN				136	151	11%	\$228	\$256	12%
PASCO, WA	SEATTLE, WA				97	146	51%	\$125	\$102	-18%
LAS VEGAS, NV	TULSA, OK				115	138	20%	\$145	\$168	16%
CHICAGO, IL	GRAND RAPIDS, MI				148	137	-7%	\$199	\$216	9%
ATLANTA, GA	RENO, NV				123	129	5%	\$220	\$244	11%
SALT LAKE CITY, UT	TAMPA, FL		HP	3%	114	115	1%	\$208	\$217	4%
ALBANY, NY	FT. LAUDERDALE, FL				110	109	-1%	\$137	\$141	3%
DENVER, CO	WEST PALM BEACH, FL				117	100	-14%	\$224	\$255	14%
FT. LAUDERDALE, FL	MANCHESTER, NH		WN	31%	40	93	130%	\$130	\$123	-5%
GREENSBORO, NC	WASHINGTON, DC				110	90	-18%	\$200	\$203	2%
MIAMI, FL	PROVIDENCE, RI				43	83	95%	\$187	\$155	-17%
ST. LOUIS, MO	WEST PALM BEACH, FL				50	64	27%	\$221	\$167	-24%