WEBINAR

SUMMER PERSPECTIVES

IS US GROWTH SLOWING DOWN OR SPEEDING UP?

WEDNESDAY 26TH MARCH

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SPEAKERS

CHIEF ANALYST

John Grant

Chief Analyst, OAG

With a wealth of experience across the global aviation industry, John provides expert commentary on market developments for OAG, making connections between what the data is telling us and the trends and events occurring in the sector.

GUEST SPEAKER

Brett Snyder

President, Cranky Flier

Brett Snyder is the President of Cranky Flier LLC, an airline industry-focused company which publishes the Cranky Flier blog, produces the annual Cranky Network Awards, and creates the network analysis at Cranky Network Weekly. He is also the co-host of The Air Show podcast and President of Cranky Concierge travel assistance. Snyder previously worked in pricing, marketing and strategy roles with several airlines, including America West and United.

MODERATOR

Deirdre Fulton

Partner, MIDAS Aviation

Deirdre is a partner in an aviation consultancy providing meaningful insight and analysis to clients around the world. She works closely with OAG on their data analysis and publications.

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Today’s discussion

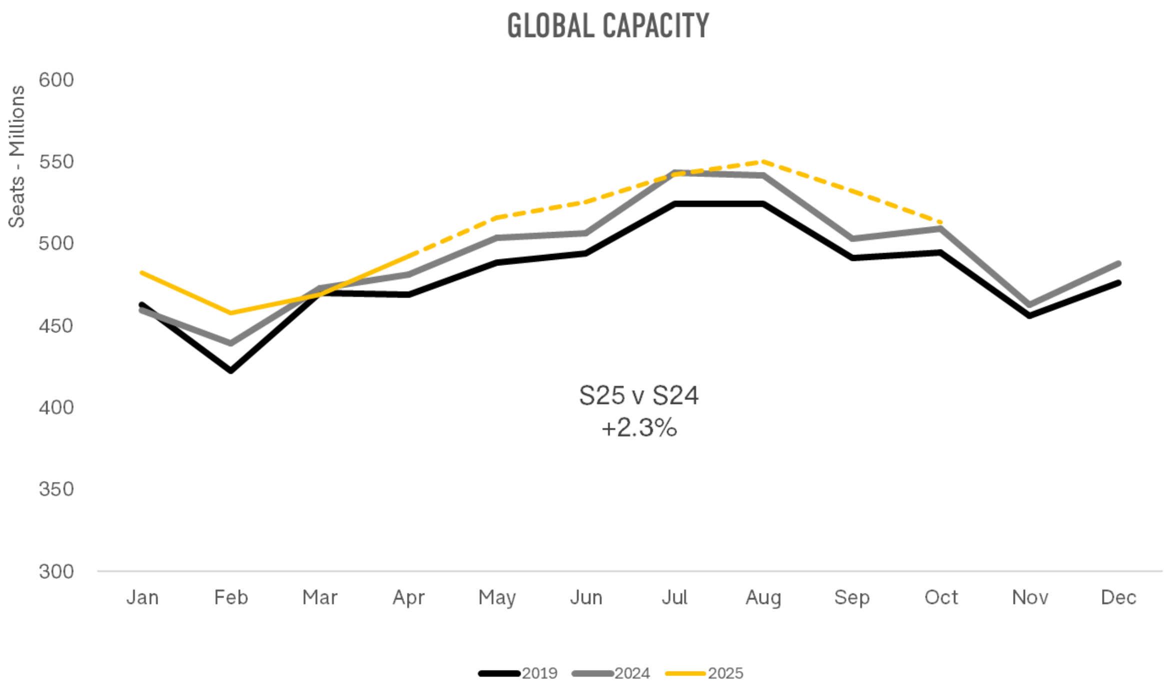
Today we’re exploring Summer 2025 capacity and frequency trends in the US market.

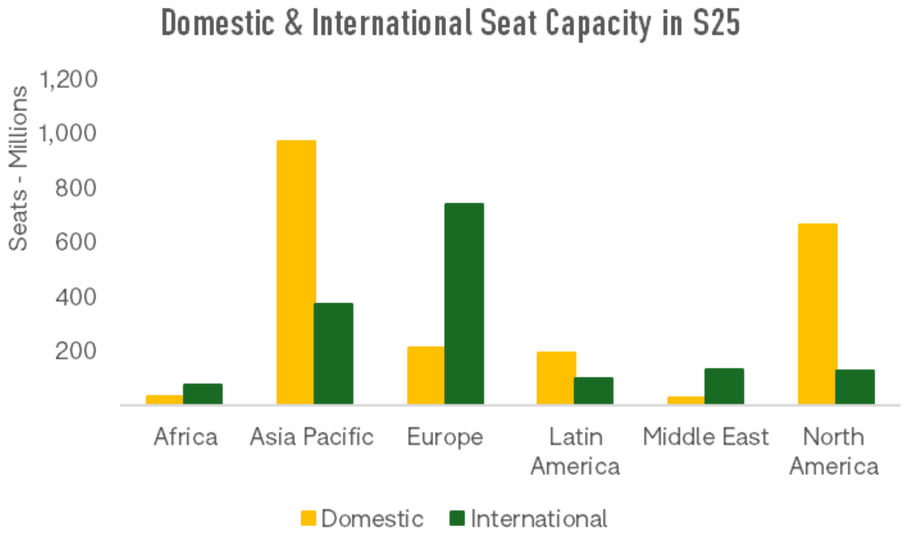
- Capacity trends for some segments suggest the domestic market is softening - is a slowdown imminent?
- Key international destinations for Summer 2025 - strong growth is expected to Mexico, Europe
- Airline strategies old and new; we consider how changes in strategy are playing out in today's market
- Aligned to that, are recent fleet decisions impacting growth plans in 2025 and beyond?

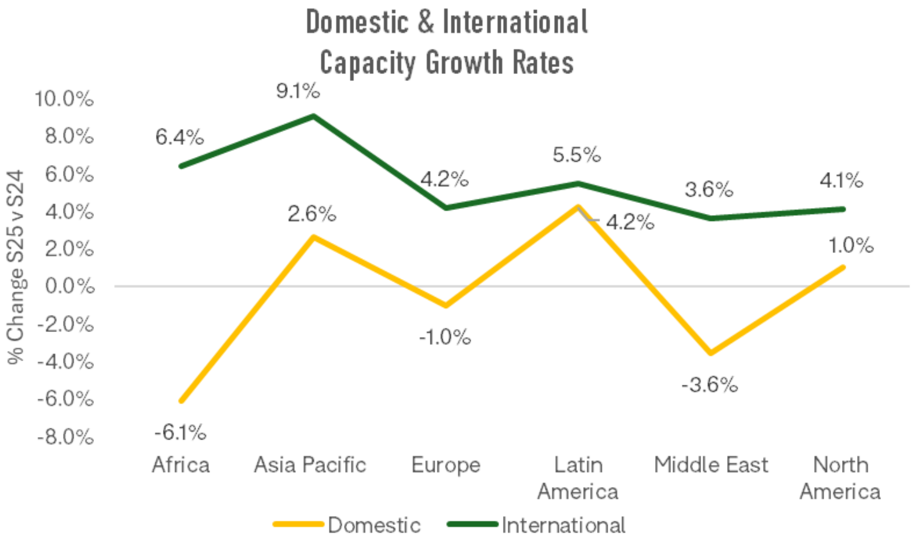
We’ll be taking questions as we go. Please use the chat function to ask your questions

GLOBAL GROWTH TRENDS

- Capacity for this summer is expected to be 2.3% ahead of 2024. For the year to date so far (Jan-Mar25), capacity is 2.7% ahead of the same months in 2024.







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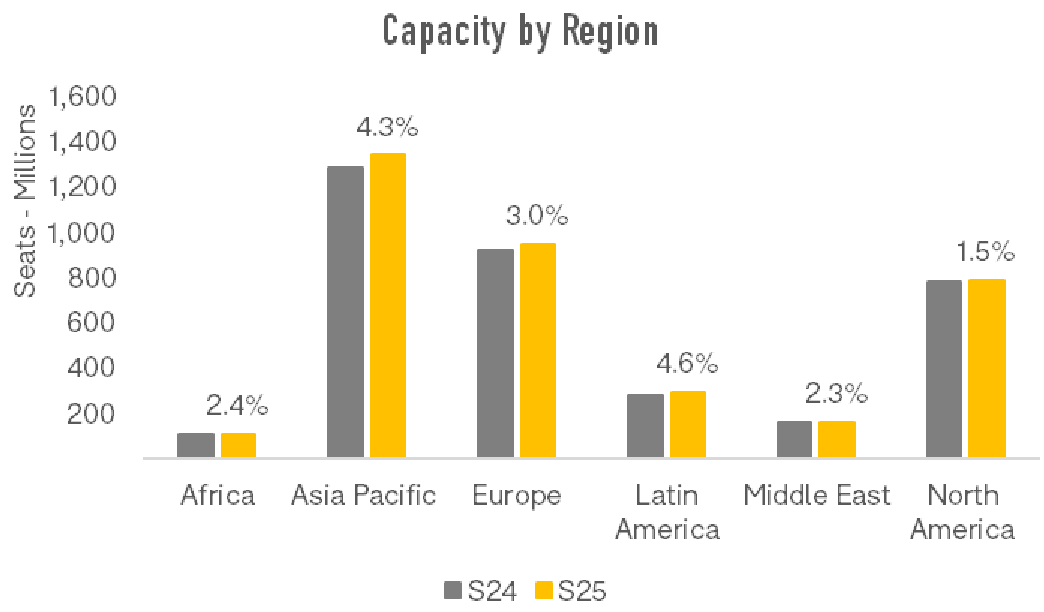
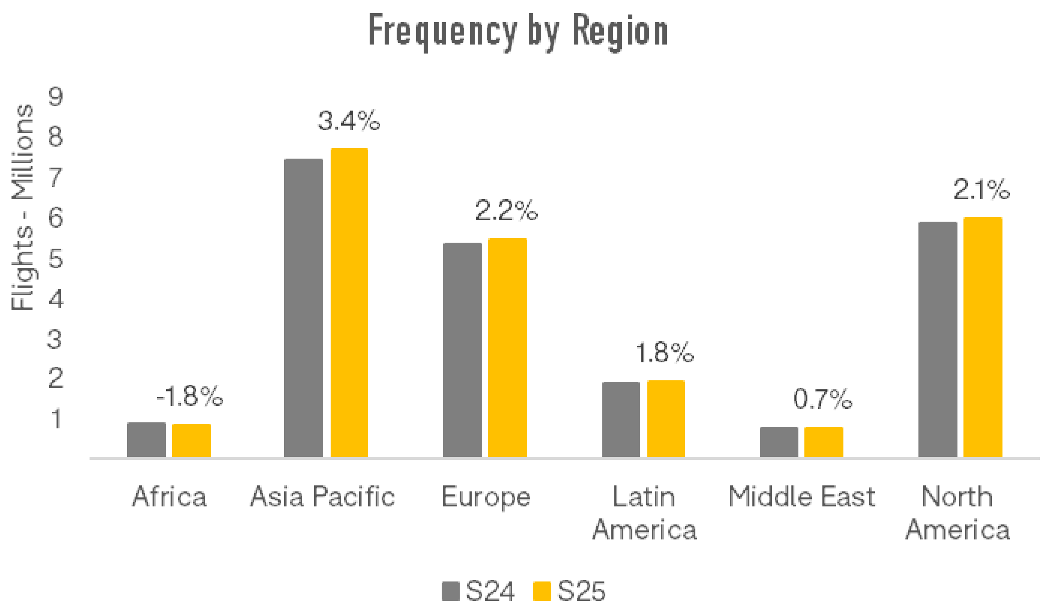
S25 v S24 Capacity & Frequency Changes





- This summer capacity is expected to grow fastest in the Latin America and Asia Pacific regions, with increases of 4.6% and 4.3% respectively on Summer 2024. This is driven in part by strong growth in some of the large domestic markets in these regions.
- Frequency trends are similar, although reversed for Africa which has no frequency growth, and North America, where frequency growth is ahead of capacity growth this summer.

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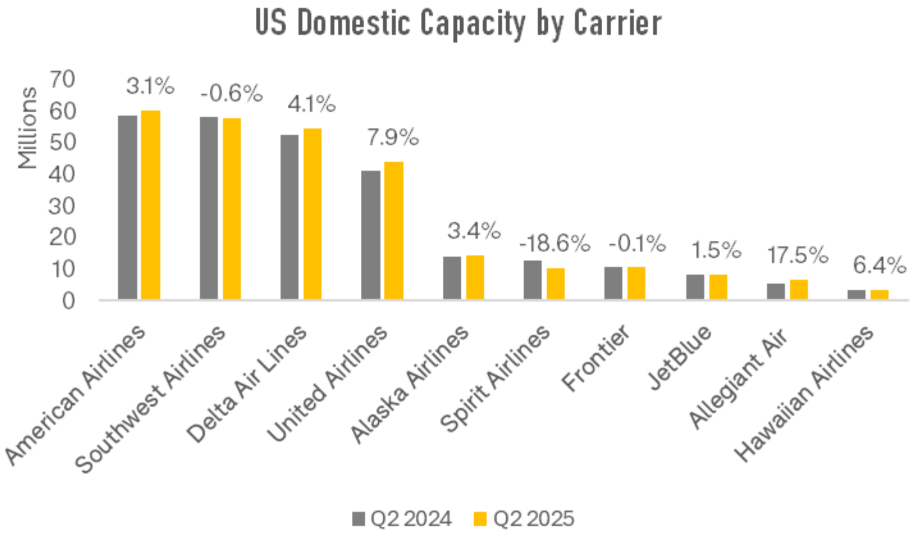
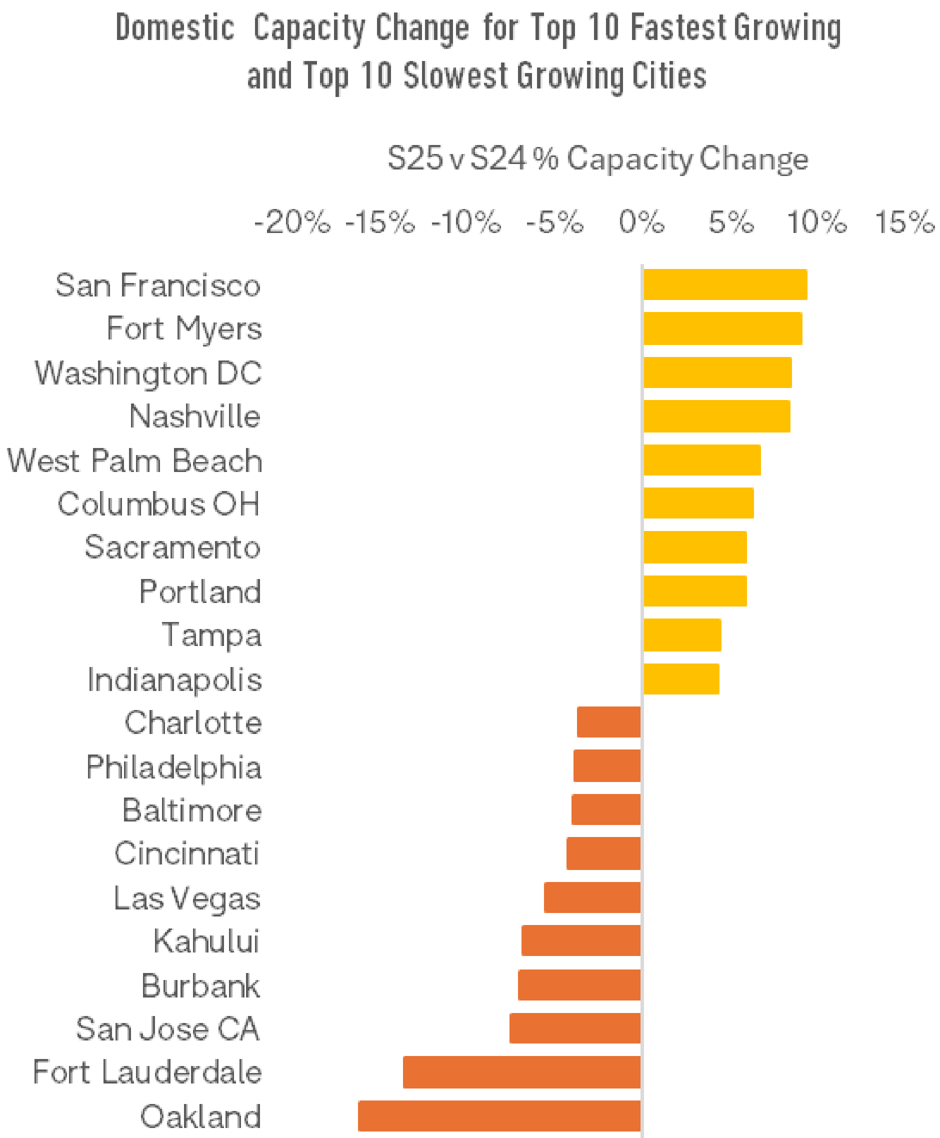
US Domestic Capacity – How is summer looking?

- Some of the fastest growing cities this summer for domestic capacity are in Florida – Fort Myers, West Palm Beach, and Tampa, and there is also strong capacity growth in California, in San Francisco and Sacramento.
- Some of the above growth is counterbalanced by reductions in nearby cities e.g. a switch from Fort Lauderdale to West Palm Beach driven by the Spirit Chapter 11 process.





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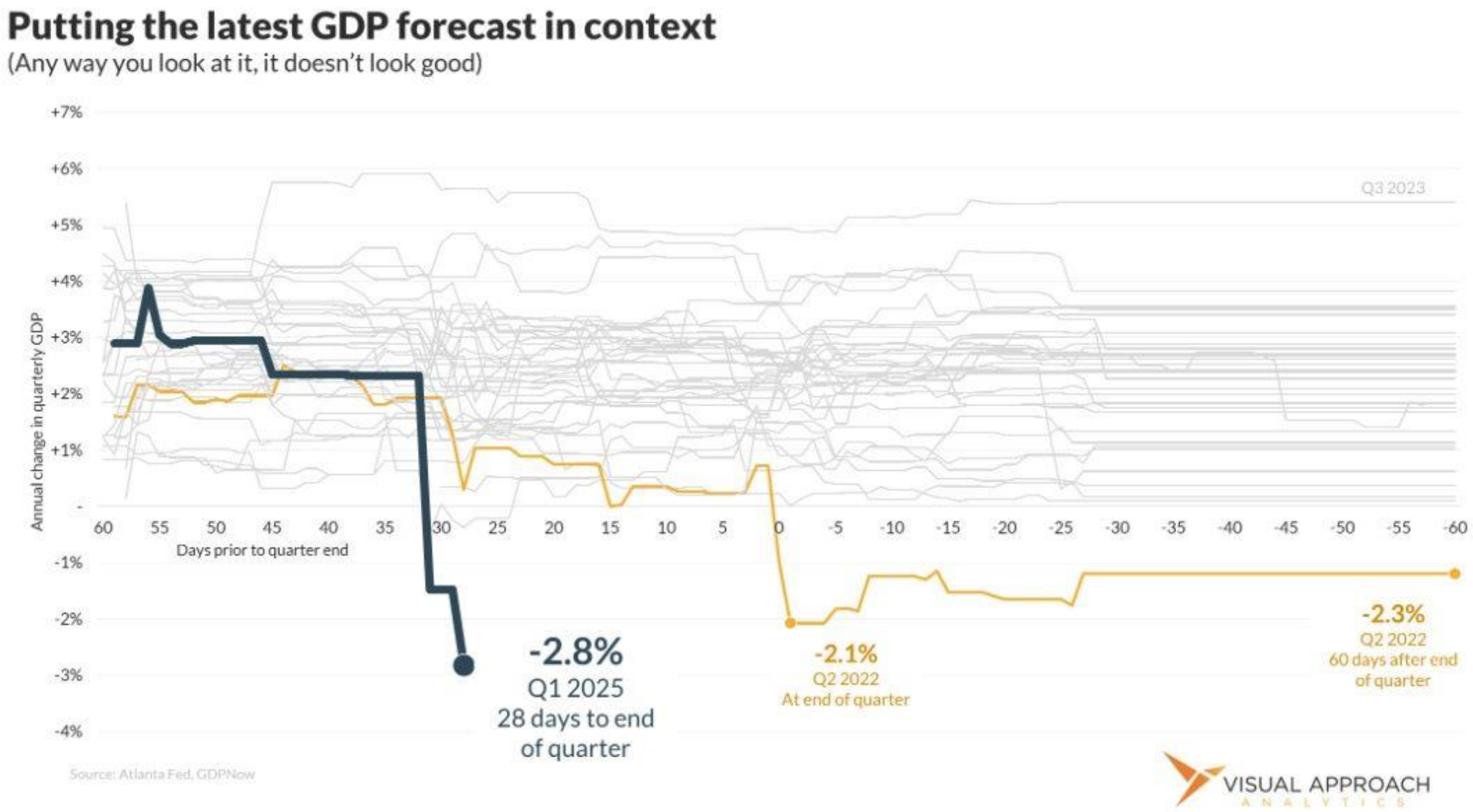
Is Domestic demand softening?



- While there may be many factors driving a sharp projected downturn in US GDP, and it may yet be too early to tell how the next quarter, and the rest of the summer will pan out, this suggests that we should be cautious about demand this summer.

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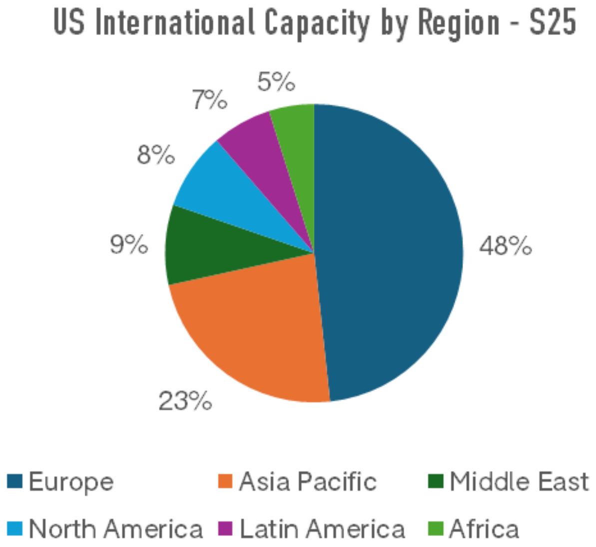
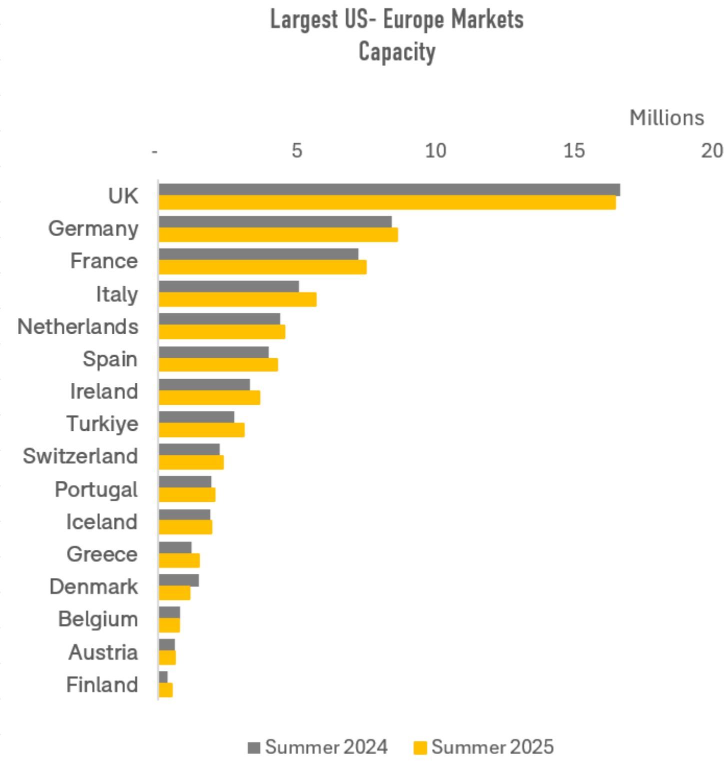
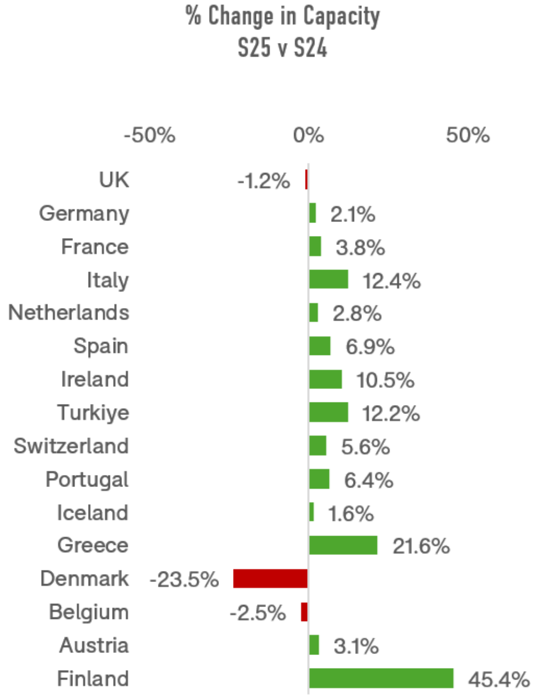
Looking out: where are Americans taking their passports this summer?



- Europe remains the most important market for US International capacity with the UK the largest.
- US-UK capacity is flat this summer due to Norse reducing capacity by 18% and some capacity reductions from American Airlines.





- The strongest growth coming from Italy, Ireland, Turkiye, Greece and Finland – all of which have seen double digit capacity growth this summer.
- All three major US airlines are planning double digit growth to Italy this year, collectively adding 260,000 seats.
- In the Spanish market, Iberia have dropped capacity by some 35,000 as their oneWorld and joint venture partner American Airlines adds 75,000 seats to the country.

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Looking in: how are forward bookings shaping up for travel into the US?

Comparing the total number of scheduled one-way seats the two countries that were filed on the 3rd March against those filed on the 24th March as the table below shows there has been over 320,000 seats removed by airlines operating between the two countries through to the end of October.

The most noticeable cuts are in July and August the two peak summer season months where airlines have cut capacity by some 3.5%.

Forward booking data suggests a significant change in booking numbers for travel between the US and Canada.

In each month through to the end of September current bookings made through one major GDS are down by over 70% suggesting that travellers are holding off making reservations as they wait to see how the wider trade dispute develops.

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Scheduled Airline Capacity From Canada To The US - 24th March 2025 Vs 3rd March 2025

Month	Scheduled Seats Filed On 3rd March 2025	Scheduled Seats Filed On 24th March 2025	% Change
Apr-25	1,542,200	1,509,293	-2.1%
May-25	1,724,135	1,669,672	-3.2%
Jun-25	1,837,590	1,790,543	-2.6%
Jul-25	1,976,352	1,906,617	-3.5%
Aug-25	1,996,805	1,926,806	-3.5%
Sep-25	1,811,738	1,782,668	-1.6%
Oct-25	1,731,817	1,711,575	-1.2%

Forward Booking Snapshot Canada – US Market, March 2024 Vs March 2025 Summer Season Bookings

Month Of Booking Snapshot	April	May	June	July	August	September
Mar-24	1,218,570	817,912	649,878	516,344	370,228	233,160
Mar-25	295,982	226,980	184,720	147,679	103,914	65,680
% Change	-75.7%	-72.2%	-71.6%	-71.4%	-71.9%	-71.8%

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Airline strategy – turbulent times

- Is more (LCC) consolidation in the US market inevitable?
- While there is strong demand to fly from the US to Europe because of the strong USD, will this be reciprocated in the coming months – and next few years?
- What will be the impact of changes to tariffs?

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