UNDERSERVED UNCOVERED

US EDITION

OAG's Top 25 US underserved routes

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OAG's Top 25 US underserved routes

In this spin off series from OAG's Top 50 Global Underserved Routes, we look at the Top 25 underserved domestic routes in the United States.

We know that globally a large majority of passengers choose to take a combination of flights to reach their destination, connecting at an intermediate airport. The reasons for this are myriad although when it comes to US domestic services, the technical capability of an aircraft to fly the distance or the state of bilateral air service agreements will not be among them.

The US is the largest domestic scheduled air transport market in the world and airline routes criss-cross the country so it might be expected that there are fewer routes which regularly attract large volumes of indirect passengers. Surely everyone can get wherever they need and want to go.

As we show, this is not the case. All of the Top 25 Underserved routes have in excess of 125,000 passengers flying them via a third airport, which makes the case that these routes are potentially underserved by regular scheduled air services. Drawing on OAG DOT Analyser data, we have also looked at the load factors achieved on the non-stop sectors and with many that are averaging close to 90%, it is possible that airlines are 'spilling' traffic on these routes.

All but three of the routes in the Top 25 are operated with non-stop services in addition to the various indirect routings that are possible. These three are Los Angeles – New York La Guardia (LAX – LGA), Washington National – San Diego (DCA – SAN) and Orlando-Portland (MCO – PDX). A small volume of traffic for these routes is shown in the table rankings but that can be explained by the way through-flight ticket data is gathered.

While we recognise that there will always be passengers who choose to travel indirectly, especially in the country that is the home of the frequent flyer programme, the volume of indirect traffic on some routes is an indication of where airlines could be looking to develop new air services.

About the data

The ranking draws on OAG Traffic Analyser data for scheduled airline bookings in 2015 and identifies the Top 25 domestic routes for the volume of traffic which makes a single connection to travel between an origin airport and a destination airport.

The summary table also shows the non-stop bookings on each route for 2015, and this data is also taken from OAG Traffic Analyser.

Load factors for each route have been added to the table via OAG DOT Analyser.

The report only considers scheduled air services but some of the routes may have significant volumes of charter traffic, especially if they are known as serving leisure destinations.

OAG's Top 25 US underserved[1] routes

Sources:
OAG traffic analyser
OAG DOT analyser

Rank	Route	From (or to)	To (or from)	One-stop bookings 2015	Non-stop bookings 2015	Sector load factor 2015
1	BOS-MCO	Boston	Orlando	209,558	713,189	86.9
2	BOS-LAS	Boston	Las Vegas	203,599	285,224	87.2
3	MCO-SEA	Orlando	Seattle/ Tacoma	199,336	124,628	91.7
4	BOS-SFO	Boston	San Francisco	177,621	1,011,472	88.0
5	BOS-LAX	Boston	Los Angeles	168,790	928,078	85.9
6	BOS-TPA	Boston	Tampa	168,627	325,465	89.5
7	LAX-PHL	Los Angeles	Philadelphia	165,659	257,174	84.9
8	LAS-MCO	Las Vegas	Orlando	163,481	272,746	90.1
9	ATL-LAX	Atlanta	Los Angeles	162,698	784,512	92.5
10	LAX-LGA	Los Angeles	New York-La Guardia	159,051	11,507	-
11	MCO-SFO	Orlando	San Francisco	153,290	180,006	88.9
12	DCA-LAX	Washington-National	Los Angeles	153,206	260,587	89.7
13	BWI-LAX	Baltimore	Los Angeles	150,637	278,603	89.7
14	EWR-LAX	Newark	Los Angeles	149,247	993,605	84.9
15	DCA-SAN	Washington-National	San Diego	147,016	37,716	-
16	BOS-FLL	Boston	Fort Lauderdale	143,751	521,252	86.2
17	BWI-LAS	Baltimore	Las Vegas	138,592	376,983	90.6
18	BOS-SAN	Boston	San Diego	138,044	255,265	87.2
19	LAS-TPA	Las Vegas	Tampa	137,029	152,078	89.5
20	EWR-LAS	Newark	Las Vegas	130,966	413,127	91.3
21	MCO-PDX	Orlando	Portland	130,232	9,204	-
22	DTW-LAX	Detroit	Los Angeles	129,134	355,688	89.6
23	DCA-SFO	Washington-National	San Francisco	127,581	174,035	82.0
24	MCO-MSP	Orlando	Minneapolis/ St. Paul	126,320	557,666	87.2
25	LAX-MCO	Los Angeles	Orlando	125,493	529,691	87.9

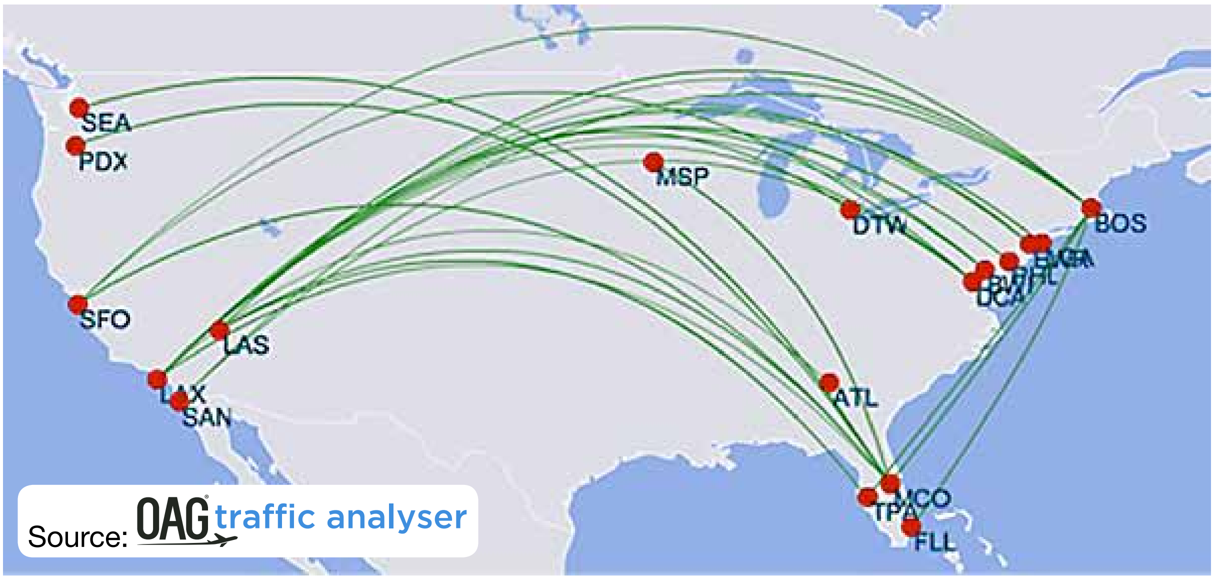
[1] By underserved we mean routes which may have non-stop services or may only be served with connecting services

Key findings

The Top 25 Underserved routes in the US saw 3.9 million passengers travel indirectly (i.e. via a third point) to reach their destination in 2015.

The majority of these routes connect airports on the West Coast to the East Coast with connections available via numerous hub airports located in between.

ONE-STOP BOOKINGS BY MAIN ORIGIN/DESTINATION COUNTRY MARKETS



The largest indirect market was between Boston and Orlando (BOS-MCO) which had 210,000 indirect bookings. The route clearly has a much larger volume of direct (or non-stop) traffic but over a fifth of the total market is choosing to travel indirectly.

Boston is at one end of five of the top six underserved routes and features seven times in the ranking. This is clearly a direct consequence of its geographic location which means airlines are unable to rely on hub traffic at Boston itself to support direct air services. Rather, Boston traffic may be useful to support airline hubs elsewhere.

The route ranked second is Boston – Las Vegas (BOS-LAS) which has 204,000 indirect passengers, over 40% of the total bookings for travel between the two airports in 2015.

Los Angeles features most frequently in the Top 25 ranking with nine of the Top 25 routes starting or ending there. Like Boston, its coastal location means that there are plenty of hub airports to facilitate connections from Los Angeles to points of the East Coast.

Also with a peripheral location, Orlando features seven times in the Top 25 ranking.

The opportunity

While there may be good reason for some of these routes to have such large indirect traffic flows, the scale of indirect travel does point to the fact that there are still rich pickings for airlines looking for new market opportunities.

One such airline may be Alaska Airlines. Since undertaking the original analysis, the airline has announced it will be starting a new service between Portland and Orlando from March 2017. How long before many of these routes have new direct air services?

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