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J.D. Power and Associates Reports:
Most Passengers Do Not Take Advantage of Express Check-In Options at the Airport

Hong Kong, Singapore, Calgary and San Antonio Airports
Rank Highest in Passenger Satisfaction in Their Respective Segments

FOR IMMEDIATE RELEASE: December 6, 2004

WESTLAKE VILLAGE, Calif.—Although checking in for a flight at the airline's main counter takes significantly longer than curbside service or self-service kiosks, less than one-quarter of passengers take advantage of either of these express check-in options, according to the J.D. Power and Associates 2004 Global Airport Satisfaction Index StudySM released today.

The study, now in its fifth year, measures airport satisfaction in three segments: large (30 million or more passengers per year), medium (10 million to less than 30 million passengers per year) and small (less than 10 million passengers per year).

While overall satisfaction is higher among passengers who check in at curbside, online and at self check-in kiosks, a majority (59%) of passengers check in at the main counter, which takes an average of 19 minutes. Just 18 percent use a self check-in kiosk, which averages 8 minutes, while 10 percent check in at curbside, which averages 13 minutes. While many airlines now allow passengers to obtain their boarding pass through the Internet, currently only 5 percent of passengers use this option.

"Time is a prime commodity in the travel industry, and is a major factor in influencing customer satisfaction with airports," said Linda Hirneise, partner and executive director of travel industry research at J.D. Power and Associates. "Even though faster options are often available to expedite the check-in

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process, passengers either aren't aware of them or just aren't yet comfortable using them. The check-in process has the greatest impact on overall airport satisfaction. Airports need to make sure these options are available to passengers and to continue to promote their time-saving benefits."

Wait times at security checkpoints have increased 15 percent, from an average of 13 minutes in 2003 to 15 minutes in 2004. By segment, the average wait time at large airports is 16 minutes, 15 minutes at medium airports and 13 minutes at small airports. Washington-Dulles, Denver and Los Angeles are among the airports with the longest security wait times, while Singapore, London-Gatwick and Sydney have some of the shortest waits.

The study also finds that satisfaction is much higher with airports that provide an environment where passengers can multi-task. This includes services such as a wide selection of eateries and restaurants, access to business centers, wireless Internet connections and abundant shopping. More than one-half (54%) of passengers purchase food at the airport, while 37 percent shop at retail stores.

"Since September 11, safety, check-in options, security checks and the time it takes to go through the entire airport experience have forever changed the airport passenger experience," said Hirneise. "The keys to improving airport satisfaction across the globe require improving passenger facilitation, managing wait times and providing an environment where airport passengers can be productive."

Hong Kong International Airport (HKG) ranks highest in passenger satisfaction among large airports, performing particularly well across all key measures of airport satisfaction. Three U.S. airports follow in the ranking: Orlando (MCO), Denver (DEN) and Dallas/Fort Worth (DFW), respectively.

Singapore's Changi International (SIN) ranks highest among medium-sized airports for the third consecutive year and receives the highest overall passenger satisfaction score in the study by a significant margin. Singapore is followed in the rankings by Pittsburgh (PIT), Cincinnati-Northern Kentucky (CVG) and Portland (PDX), respectively.

Overall satisfaction is significantly higher for passengers opting for small airports, where wait times and passenger facilitation are generally more manageable. Calgary (YYC) and San Antonio (SAT) rank highest in a tie among small airports. Calgary performs particularly well in terminal facilities and retail concessions, while San Antonio receives particularly high ratings from passengers for the security check. Calgary and San Antonio are followed in the rankings by Austin (AUS), Boise (BOI) and Indianapolis (IND), respectively.

The 2004 Global Airport Satisfaction Index Study is based on responses from more than 9,000 passengers who took a flight between October 2003 and November 2004. Respondents were surveyed in six different languages and each evaluated up to two different airports.

Headquartered in Westlake Village, Calif., J.D. Power and Associates is an ISO 9001-registered global marketing information services firm operating in key business sectors including market research, forecasting, consulting, training and customer satisfaction. Media e-mail contact: michael.greywitt@jdpa.com or john.tews@jdpa.com

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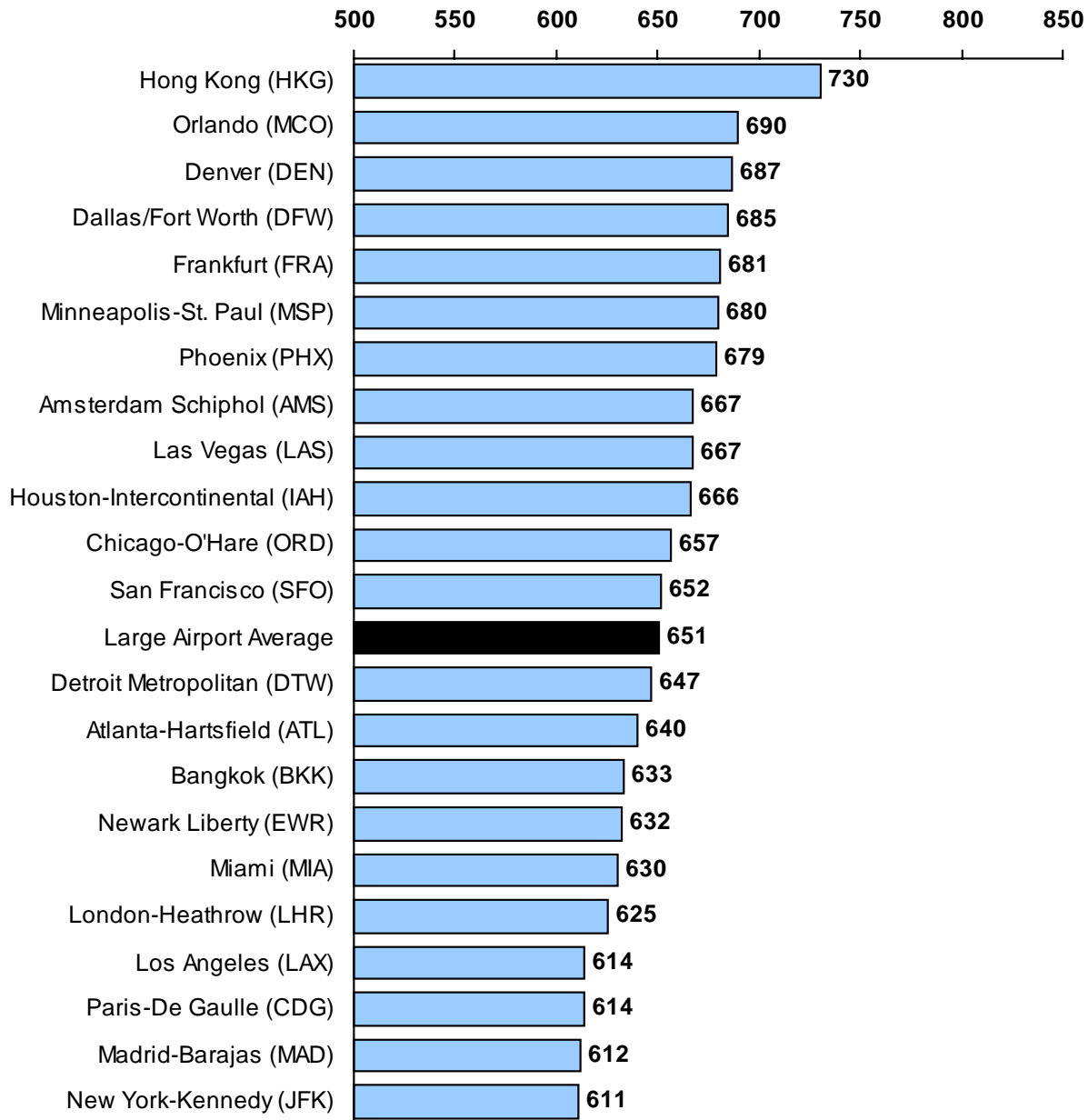
NOTE: Three charts follow.

J.D. Power and Associates 2004 Global Airport Satisfaction Index StudySM

Large Airport Ranking

(30 million passengers or more per year)

Overall Passenger Satisfaction Index Score
(Based on a 1,000-point scale)



NOTE: Tokyo-Haneda (HND) is included in the study but is not ranked due to insufficient sample size.

Source: J.D. Power and Associates 2004 Global Airport Satisfaction Index StudySM

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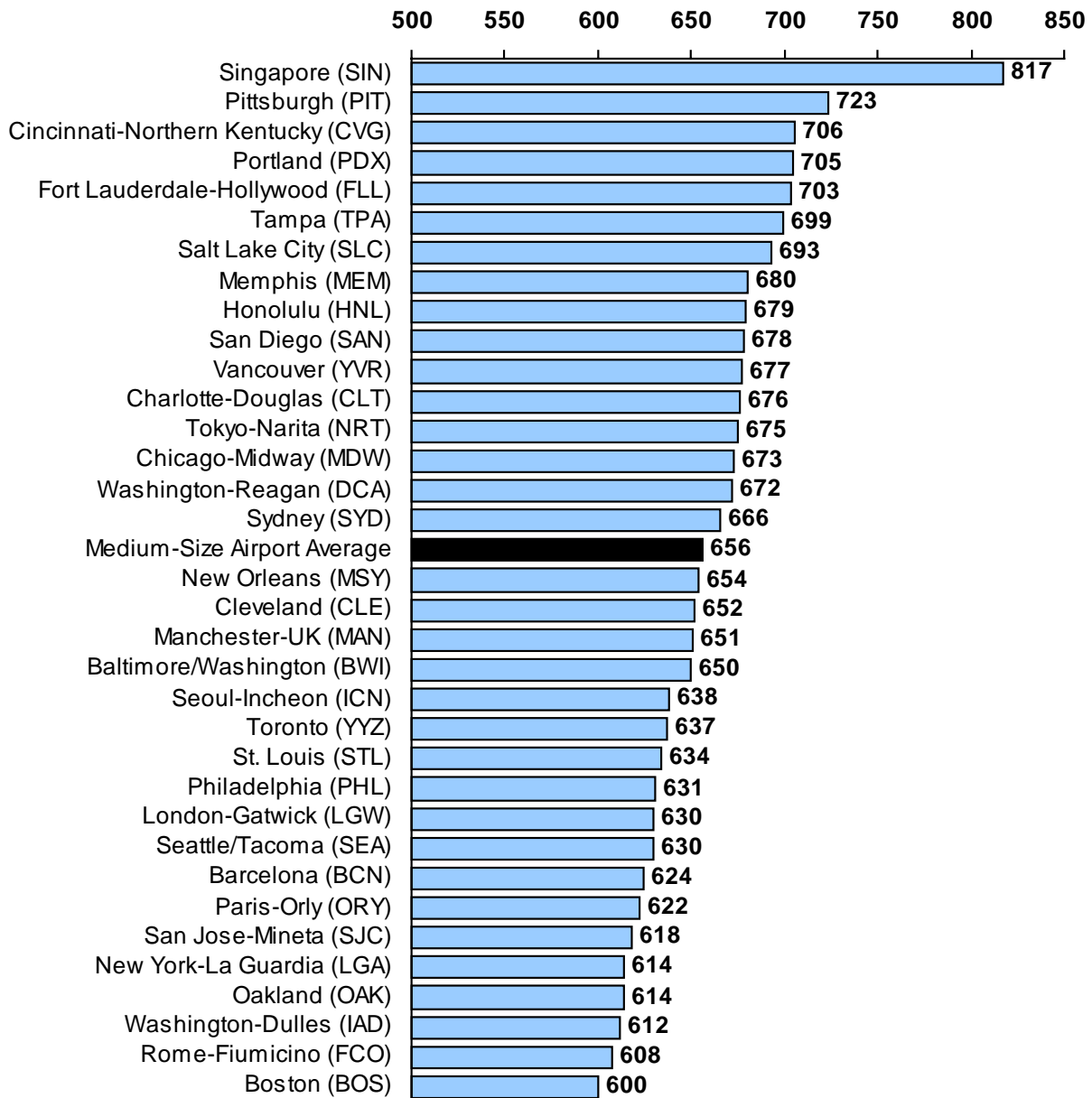
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Medium-Size Airport Ranking

(10 million to less than 30 million passengers per year)

Overall Passenger Satisfaction Index Score

(Based on a 1,000-point scale)



NOTE: Cancun (CUN), Dubai (DXB), London-Stansted (STN), Melbourne-Australia (MEL), Mexico City (MEX), Milan-Malpensa (MXP), Munich (MUC) and Zurich-Unique (ZRH) are included in the study but are not ranked due to insufficient sample size.

Source: J.D. Power and Associates 2004 Global Airport Satisfaction Index StudySM

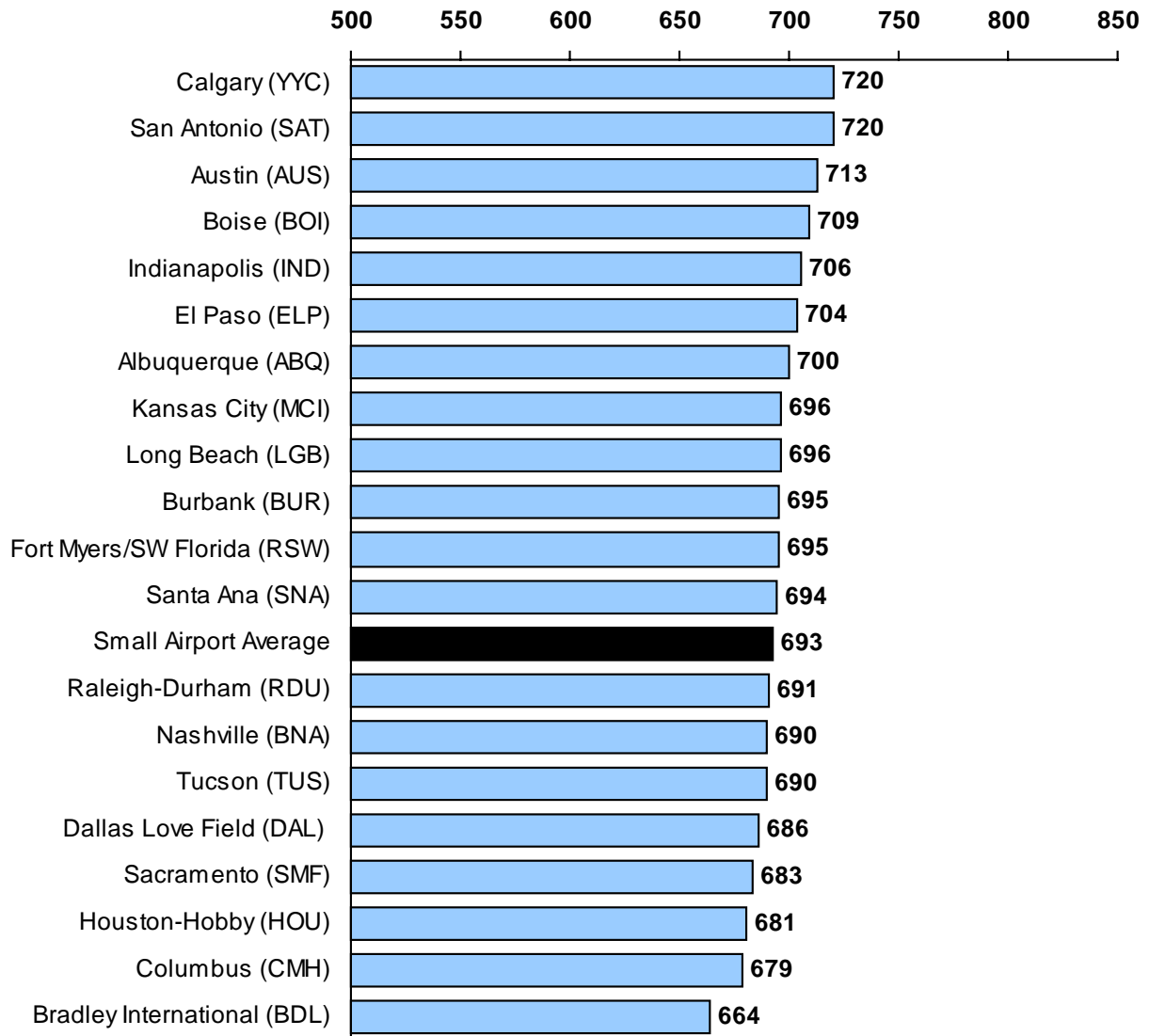
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J.D. Power and Associates 2004 Global Airport Satisfaction Index StudySM

Small Airport Ranking

(Less than 10 million passengers per year)

Overall Passenger Satisfaction Index Score
(Based on a 1,000-point scale)



NOTE: Birmingham-UK (BHX), Manchester-US (MHT), Milwaukee (MKE) and Tulsa (TUL) are included in the study but are not ranked due to insufficient sample size.

Source: J.D. Power and Associates 2004 Global Airport Satisfaction Index StudySM

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