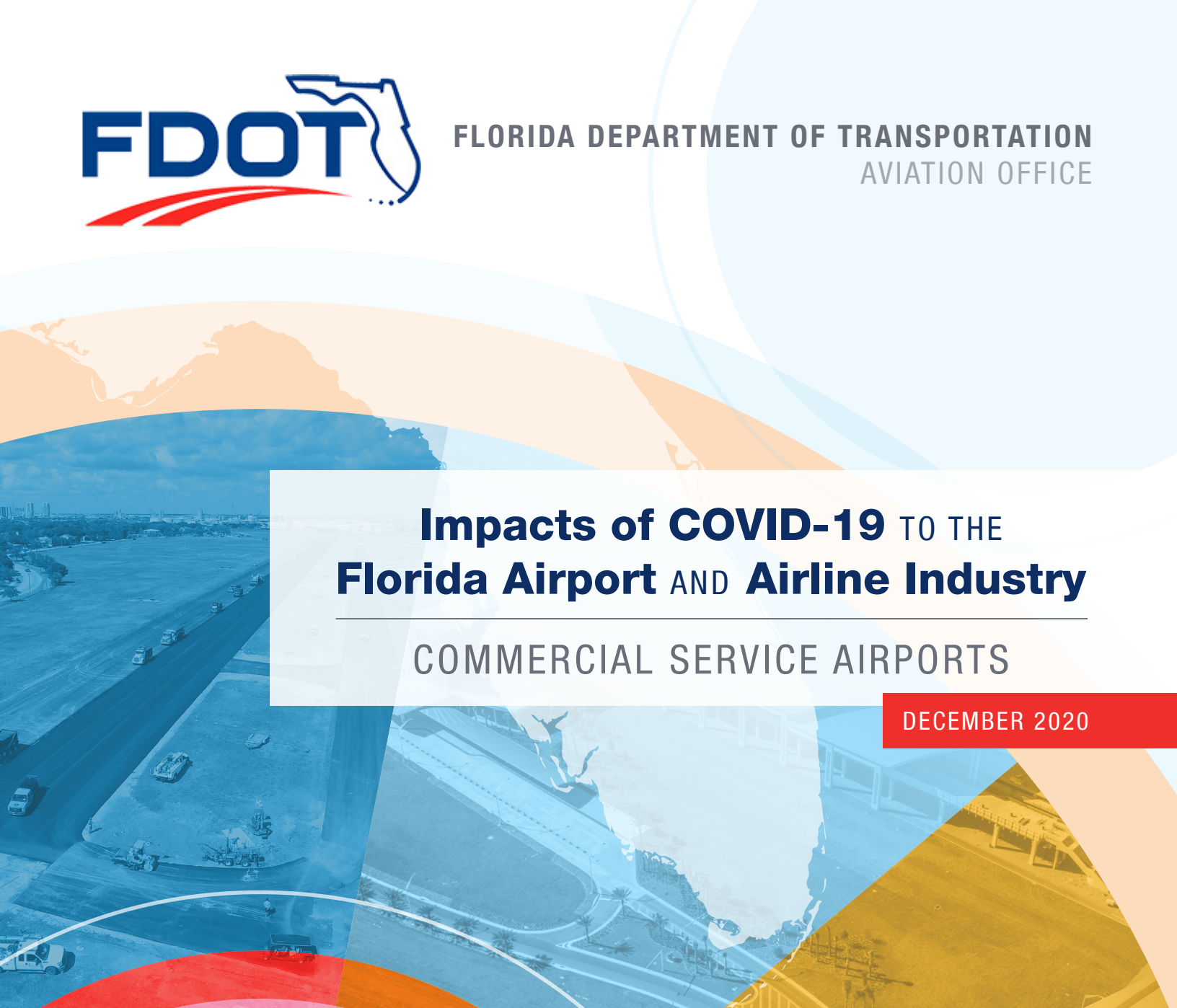
FLORIDA DEPARTMENT OF TRANSPORTATION
AVIATION OFFICE

Impacts of COVID-19 TO THE Florida Airport AND Airline Industry

COMMERCIAL SERVICE AIRPORTS

DECEMBER 2020



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Chapter 1. Outreach and Results

1.1. Introduction

The emergence of the novel coronavirus (COVID-19) has brought about circumstances unparalleled by any event since the dawn of the commercial aviation industry. The crisis caused by the COVID-19 pandemic has caused significant economic and social upheaval in communities in Florida and around the globe. The crisis has had momentous effects on the global travel and tourism industry, particularly commercial service airports and airlines. As such, the Florida Department of Transportation (FDOT) Aviation Office commissioned an analysis to document the impacts of the pandemic on Florida's commercial airport system. The analysis included outreach to the 20 commercial service airport operators in the state and five nationwide industry organizations, research of global economic impacts and industry recovery scenarios to identify impacts and future trends. The analysis is documented in a series of chapters that summarize airports' responses, evaluate economic trends and potential impacts, analyze changes to airline service at Florida commercial service airports, and forecast potential recovery scenarios. This chapter documents airport conditions as a result of COVID-19 as reported by Florida's airport representatives and includes the following sections:

- Overview of the COVID-19 Pandemic
- Florida's Response to the COVID-19 Pandemic
- Impacts to Florida's Commercial Service Airports
- Airport Pandemic Response Plans
- Impacts to Industry Organizations
- Summary

1.2. Overview of COVID-19 Pandemic

The pandemic has been caused by the rapid global spread of the disease caused by the novel SARS-CoV-2 strain of coronavirus, commonly referred to as COVID-19. COVID-19 primarily affects the respiratory system and can cause mild to severe illness for people infected by the virus. Most people infected by COVID-19 experience mild to moderate symptoms, however, older adults and those with underlying health conditions appear to be at a higher risk of experiencing severe illness or death.[1] Symptoms of COVID-19 usually appear between two and 14 days after exposure to the virus. The virus is thought to be spread primarily through respiratory droplets produced when an infected person exhales, coughs, or sneezes. As such, the Centers for Disease Control and Prevention (CDC) recommended that people remain more than six feet away from others and wear cloth or medical-grade masks, particularly when in public settings, making "social distancing" and mandatory face mask requirements a common part of everyday life.[2]

The first known outbreak of COVID-19 was reported on December 31, 2019 in the city of Wuhan, Hubei Province, China and was identified as a new strain of coronavirus on January 7, 2020. The first confirmed

[1] Centers for Disease Control and Prevention, (CDC). (July 2020). "Coronavirus Disease 2019 Basics." Available online at https://www.cdc.gov/coronavirus/2019-ncov/faq.html#Coronavirus-Disease-2019-Basics. (Accessed July 2020).
[2] Centers for Disease Control and Prevention. (May 2020). "Symptoms of Coronavirus." Available online at https://www.cdc.gov/coronavirus/2019-ncov/symptoms-testing/symptoms.html (Accessed July 2020).

case of COVID-19 in the U.S. was reported in Washington State on January 21, while the first recorded death related to the virus in the U.S. occurred on February 29. The virus began to spread rapidly around the world in early March and was declared a pandemic by the World Health Organization (WHO) on March 11. The U.S. surpassed 100,000 cases on March 27 and by April 28, the U.S. became the first country to reach 1 million confirmed cases.[3] After a brief slowdown in May and early June, the number of new cases in the U.S. began to increase dramatically with hot spots arising in Arizona, Texas, and Florida. As of September 23, 2020, Johns Hopkins University reported that there were approximately 6.9 million confirmed COVID-19 cases in the U.S., the most of any country around the globe.[4]

The pandemic has caused significant global disruptions in the lives of billions of people, businesses, governments, and organizations. As the virus spread, a series of international travel restrictions were implemented to prevent further outbreaks. The first U.S. travel restriction was issued by President Donald Trump between the U.S. and China on January 31, and a 30-day travel ban was announced between the U.S. and continental Europe on March 11. On March 18, the U.S. and Canada agreed to close the border between the nations, and subsequently, on March 20, the U.S.-Mexican border was closed to non-essential travel. The U.S. State Department raised the global travel advisory to level four, warning against all international travel on March 19.[5] These closures originally were scheduled to last 30 days, but have since been extended four separate times and are expected to last until at least October 21.[6] The travel restrictions between the U.S. and Europe were also scheduled to last 30 days but have been extended for European travelers not including U.S. citizens, long term residents, or member of the Armed Forces. For those who are exempt from the restrictions, international arrivals have been limited to 15 airports in the U.S. that have been deemed a port-of-entry based on CDC staffing levels in each airport's respective community. These ports of entry include Miami International Airport (MIA) and Fort Lauderdale/Hollywood International Airport (FLL).[7] In addition to U.S.-imposed travel restrictions, the European Union (EU) imposed travel bans on U.S. citizens and has maintained the restrictions through September 10 because of increased COVID-19 infection rates in the U.S.[8]

The COVID-19 pandemic has not only brought dozens of international travel restrictions, but also created the need for domestic travel and economic restrictions to curb the spread of the virus. During the first few weeks of the crisis in March, dozens of states closed public schools and universities and issued stay-at-home orders that prohibited non-essential business or travel. Through March, April, and May, 45 states implemented state-wide stay-at-home orders, while the remaining five states allowed local governments to implement restrictions. Most states had lifted their stay-at-home orders in May and early June.

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[3] Muccari, R., Chow, D., & Murphy, J. (July 2020). "Coronavirus timeline: Tracking the critical moments of COVID-19". Available online at https://www.nbcnews.com/health/health-news/coronavirus-timeline-tracking-critical-moments-covid-19-n1154341 (Accessed July 2020).
[4] Johns Hopkins University. (July 2020). "COVID-19 Dashboard by the Center for Systems Science and Engineering (CSSE) at Johns Hopkins University (JHU)." Available online at https://www.arcgis.com/apps/opsdashboard/index.html#/bda7594740fd40299423467b48e9ecf6. (Accessed July 2020)
[5] Ibid.
[6] U.S. Embassy. (August 2020). "Travel Restrictions – Fact Sheet". Available online at: https://mx.usembassy.gov/travel-restrictions-fact-sheet/. (Accessed September 2020).
[7] International Air Transport Association (July 2020). "COVID-19 Travel Regulations Map". Available online at: https://www.iatatravelcentre.com/international-travel-document-news/1580226297.htm. (Accessed July 2020).
[8] Brown, F. & Fletcher, B. (September 2020). "More Countries Welcoming US Tourists". Available online at: https://www.cnn.com/travel/article/us-international-travel-covid-19/index.html. (Accessed September 2020).

However, given that the number of new cases is growing in 44 states as of September 2020, more than two dozen states have either paused reopening plans or tightened restrictions to prevent further outbreaks, although no state has reissued a complete stay-at-home order at this time.[9]

1.3. Florida's Response to the COVID-19 Pandemic

COVID-19 was first reported in the State of Florida on March 1, when two cases were reported in Hillsborough and Manatee counties. On March 9, Governor Ron DeSantis declared a state of emergency, and two days later, on March 11, the CDC provided $27 million to the state government to prevent the spread of the virus. The same day, state universities announced that classes would be moved to an online format, while the Florida Department of Education announced that schools would be closed until March 30. On March 15, Universal Orlando Resort and Disney World closed their parks to visitors. By March 22, confirmed COVID-19 cases in Florida reached 1,000.[10]

The first economic restrictions were announced on March 17, when Governor DeSantis ordered all bars and nightclubs in the state to close. Three days later, on March 20, dining rooms across the state were closed as restaurants were required to transition to take-out or delivery options only. On March 23, Governor DeSantis announced the first travel restriction related to the virus, requiring any travelers from New York, New Jersey, or Connecticut to quarantine for 14 days after arrival in Florida. On April 1, after the state had surpassed 5,000 cases, Governor DeSantis announced a statewide stay-at-home order would be in effect from April 3 to April 30. This order required all residents and visitors to the State of Florida to remain at their place of residence at all times, except when providing an essential service or participating in an essential activity. However, the definition of essential services was broadly defined and included medical providers and first responders, food service and agricultural workers, law enforcement officers, transportation, energy and infrastructure workers, and communications logistics workers. Additionally, childcare centers and houses of worship could remain operational, however, it was recommended that CDC guidelines be followed. As such, retail stores, in-person dining rooms, beaches, and parks were closed to prevent the spread of the virus.[11]

The stay-at-home order was originally scheduled to last until April 30; however, Governor DeSantis allowed some state beaches and parks to reopen on April 17. The next day, Governor DeSantis announced that all schools in the state would remain closed for the remainder of the 2020 school year. On April 23, the Florida Department of Economic Opportunity announced that one million people had applied for unemployment benefits in the state since the start of the pandemic. On April 29, Governor DeSantis announced that the stay-at-home order would be lifted on May 4 for most regions of the state, while the Hillsborough County Emergency Policy Group voted on April 30 to rescind the county's stay-at-home mandate. The statewide stay-at-home order was lifted on May 4, allowing restaurant and retailers

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[9] USA Today. (July 2020). "Coronavirus Reopening". Available online at: https://www.usatoday.com/storytelling/coronavirus-reopening-america-map/#caseload. (Accessed July 2020).
[10] Sunderland, K. (July 2020). "Timeline: How Coronavirus Pandemic Developed in Florida Over Last 6 Months". Available online at: https://www.wfla.com/news/by-the-numbers/timeline-how-much-has-coronavirus-spread-through-florida-in-last-6-months/(Accessed July 2020).
[11] State of Florida. (April 2020). "FAQs for Executive Order 20-91". Available online at: https://www.flgov.com/wp-content/uploads/covid19/Exec%20Order%2020-91%20FAQs.pdf (Accessed July 2020).

across the state to begin operating in limited capacities. On May 4, the day the stay-at-home order was lifted, there were 36,897 cases confirmed cases across the State of Florida. [12]

The state transitioned to phase one of reopening on May 18, allowing gyms and restaurants to operate at 50 percent capacity. In the following two weeks, Universal Studios and Sea World announced that their parks would begin operating in June, while Disney indicated it would open its parks in limited capacities in July. On June 3, Governor DeSantis announced that 64 counties in the state would move to phase two of reopening; allowing bars, movie theaters, and casinos to reopen with 50 percent capacity, while beaches, gyms and state parks could open fully. However, Broward, Palm Beach, and Miami-Dade counties remained under phase one protocols as this region had the highest infection rates in the state. [13]

The number of daily reported cases remained steady throughout May and the first week of June as the restrictions eased across the state. However, in mid-June the number of new reported cases increased rapidly, and the state quickly became the epicenter for the virus in the U.S. [14] As such, county and municipal governments implemented new restrictions and protocols to curb the spread of the virus. On June 23 and 24 respectively, Pasco County and Pinellas County issued ordinances requiring facial coverings in indoor public spaces. In response to nearly 9,000 new cases being reported on June 26, Governor DeSantis announced that bars could no longer serve alcohol for onsite consumption. The next day, Broward County and Palm Beach County announced the closure of all beaches over the July 4th holiday weekend, following Miami-Dade County's announcement one week prior. [15]

Throughout the first half of July, the state reported record numbers of new cases on multiple days, including a record 15,299 new cases on July 12. Dozens of hospitals across the state reported that Intensive Care Units (ICUs) were nearing capacity but said that contingency plans were being put in place to increase capacity. Despite the uptick in cases, the Florida Department of Education signed an order on July 6 to reopen schools for in-person learning in August, while Walt Disney World reopened to the public on June 11. On July 24, President Trump announced that the Republican National Convention would no longer be held in Jacksonville. [16]

In early August, Florida became the first state to exceed 500,000 total confirmed cases and by September 15, the state reached 665,730 cases and 12,642 deaths related to the virus. [17] However, daily case totals declined, indicating that the pandemic may have reached its peak in the state, but the daily

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[12] Sunderland, K. (July 2020). "Timeline: How Coronavirus Pandemic Developed in Florida Over Last 6 Months". Available online at: https://www.wfla.com/news/by-the-numbers/timeline-how-much-has-coronavirus-spread-through-florida-in-last-6-months/(Accessed July 2020).
[13] Cutway, A. (June 2020). "Here's What to Expect as Florida Enters Phase 2 of Reopening". Available online at: https://www.clickorlando.com/news/local/2020/05/12/heres-what-to-expect-when-florida-enters-phase-2-of-reopening/. (Accessed August 2020).
[14] The New York Times. (August 2020). "Florida Coronavirus Map and Case Count". Available online at: https://www.nytimes.com/interactive/2020/us/florida-coronavirus-cases.html. (Accessed August 2020).
[15] Licon, A. (June 2020). "More Florida beaches announce closures as virus cases rise". Available online at: https://www.clickorlando.com/business/2020/06/29/more-florida-beaches-announce-closures-as-virus-cases-rise/". (Accessed August 2020).
[16] Cutway, A. (August 2020). "Timeline: The spread of coronavirus in Florida". Available online at: https://www.clickorlando.com/news/local/2020/03/20/timeline-the-spread-of-coronavirus-in-florida/. (Accessed August 2020).
[17] Florida Department of Health (September 2020). "Current Situation in Florida". Available online at: https://floridahealthcovid19.gov/. (Accessed September 2020).

death toll remained near the highest levels since the pandemic began.[18] Infection rates continued to decrease through the end of August, when new daily cases dipped below 2,000 for the first time since June 15. During this time, restrictions were eased in several communities around the state and students in 13 counties returned to in-person learning. On September 10, the State announced that bars and restaurants could reopen to indoor dining at 50 percent capacity. The next day, Governor DeSantis announced that Miami-Dade and Broward counties, two of the state's hotspots for the virus, could move to phase two of reopening, allowing bars, movie theaters, and casinos to reopen.[19] Finally, on September 25, Governor DeSantis announced that the state was moving to phase 3 of reopening, allowing all businesses that had been shut down by the pandemic to reopen and allowing restaurants to reopen to at least a 50 percent capacity. However, multiple counties and municipalities have announced that they will continue to enforce capacity restrictions and social distancing guidelines.[20]

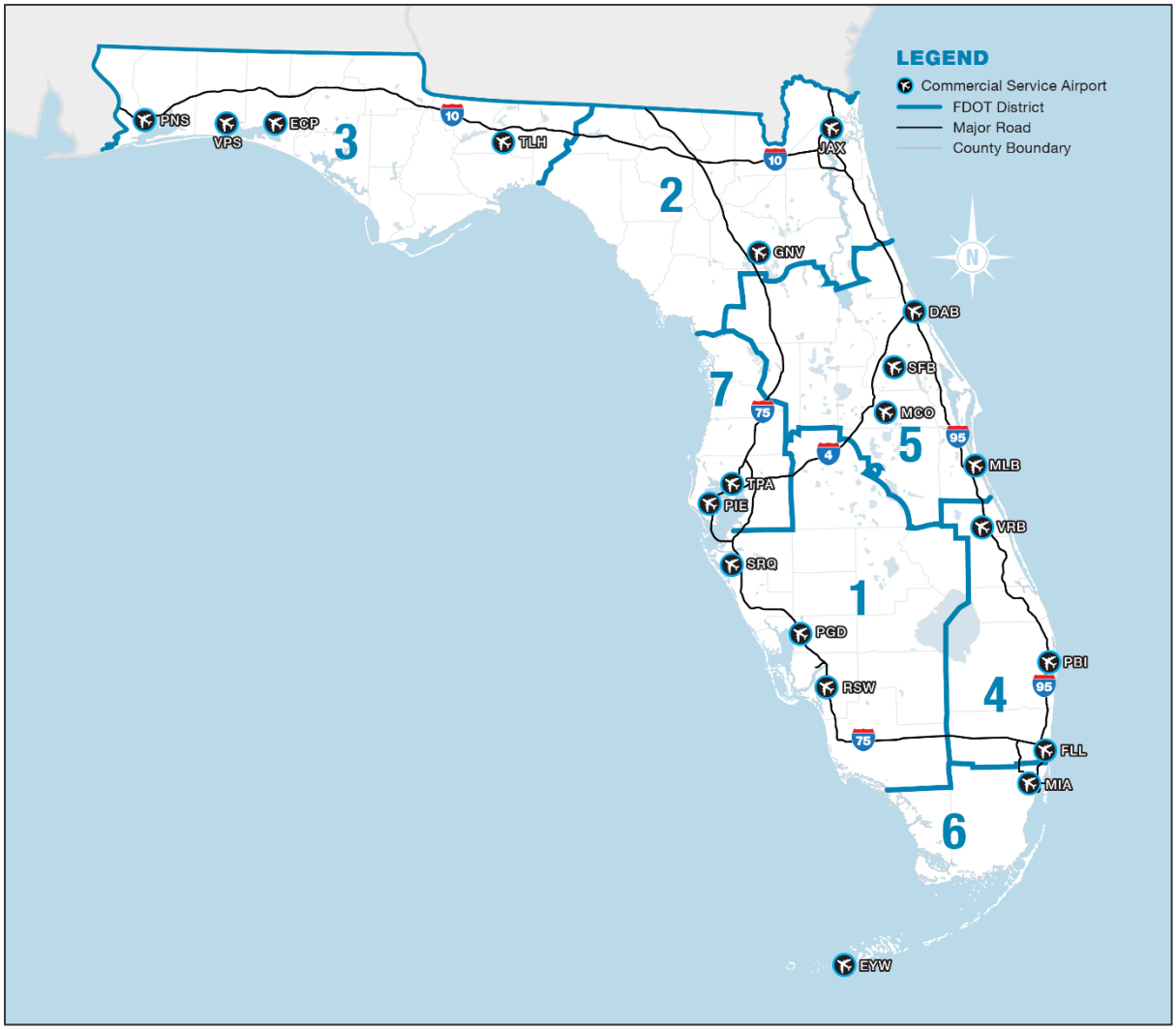
1.4. Impacts to Florida's Commercial Service Airports

As the COVID-19 pandemic spread around the globe, Florida's commercial service airports bore the brunt of consequences caused by travel restrictions imposed domestically and abroad. As such, the FDOT Aviation Office determined that it was important to document the ongoing impacts of the pandemic and postulate possible long-term trends, economic changes, and recovery scenarios. The first step in the analysis was to gather information from Florida's 20 commercial service airports and multiple industry organizations to determine the impacts of the pandemic on Florida's commercial aviation system.

Figure 1-1 presents the 20 airports included in the Florida commercial service airport system that are included in the COVID-19 analysis.

[18] Ibid.
[19] Mazzei, P. & Fernandez, M. (September 2020). "'All In, All the Time': Reopening Florida Schools Is Likened to Military Operation". Available online at: https://www.nytimes.com/2020/08/19/us/coronavirus-schools-florida-local-control.html. (Accessed September 2020).
[20] Ceballos, A. & Solomon, J., (September 2020). "DeSantis Lifts Statewide Restrictions on Bars and Restaurants as Florida Moves to Phase 3". Available online at: https://www.tampabay.com/news/florida-politics/2020/09/25/desantis-bars-and-restaurants-can-go-to-full-capacity-as-florida-moves-to-phase-3/ (Accessed September 2020).

Figure 1-1: Florida Commercial System



Source: Kimley-Horn, 2020

1.4.1. Data Collection Process

Data for this analysis was collected through an outreach process that included questionnaires, phone interviews, and industry research. Two questionnaires were developed: one for airports and one for industry organizations. The airport questionnaires were individually prepopulated using publicly available financial and operational information from each commercial service airport. These questionnaires were then used to facilitate conversations between the project team and airport managers and staff members, as well as staff from the FDOT Aviation Office and each airport's respective FDOT District office. These calls were completed between early August and mid-September 2020, which allowed airports to gather approximately four months of data from the beginning of the pandemic. Airports were asked to provide information including ratings of the pandemic's impact on their airport's finances, operations, and existing and future capital development projects; the impacts on the airport's operating revenues when compared to the prior year, and how the airport plans to use CARES Act funding. Airport representatives were also

asked to discuss their airport's plans to protect passengers and staff from transmitting COVID-19, changes to airport and tenant staffing, and the airport's plans for recovery.

For the purpose of this analysis, commercial service airports were categorized using their classifications from the Federal Aviation Administration's (FAA) 2019-2023 National Plan of Integrated Airport Systems (NPIAS) report.

Table 1-1 summarizes the 20 commercial service airports included in the analysis. It should be noted that Vero Beach Regional is a non-primary commercial service airport, indicating that the majority of the airport's activity is general aviation.

Table 1-1: Florida Commercial Service Airports

Airport Name	Associated City	FAA ID	Hub Size
Daytona Beach International	Daytona Beach	DAB	Non
Destin-Fort Walton Beach	Destin/Fort Walton Beach	VPS	Small
Fort Lauderdale/Hollywood International	Fort Lauderdale	FLL	Large
Gainesville Regional	Gainesville	GNV	Non
Jacksonville International	Jacksonville	JAX	Medium
Key West International	Key West	EYW	Non
Melbourne International	Melbourne	MLB	Non
Miami International	Miami	MIA	Large
Northwest Florida Beaches International	Panama City	ECP	Small
Orlando International	Orlando	MCO	Large
Orlando Sanford International	Orlando	SFB	Small
Palm Beach International	West Palm Beach	PBI	Medium
Pensacola International	Pensacola	PNS	Small
Punta Gorda	Punta Gorda	PGD	Small
Sarasota/Bradenton International	Sarasota/Bradenton	SRQ	Small
Southwest Florida International	Fort Myers	RSW	Medium
St. Pete-Clearwater International	St. Petersburg/Clearwater	PIE	Small
Tallahassee International	Tallahassee	TLH	Non
Tampa International	Tampa	TPA	Large
Vero Beach Regional	Vero Beach	VRB	Non-Primary

Source: 2019-2023 FAA NPIAS Report

1.4.2. Impacts to Passenger Enplanements and Airport Revenues

Florida's commercial service airports rely on many different revenue streams to support their operational activities; and although each airport has a unique revenue structure, there are common sources of revenue to airports. As the situation surrounding the pandemic evolved and air traffic declined, certain sectors of airport operations and select revenue streams were disproportionately impacted. As such, different airports have been more significantly affected by the loss in air traffic. During the outreach process of this analysis, airport representatives were asked to provide information about changes to their

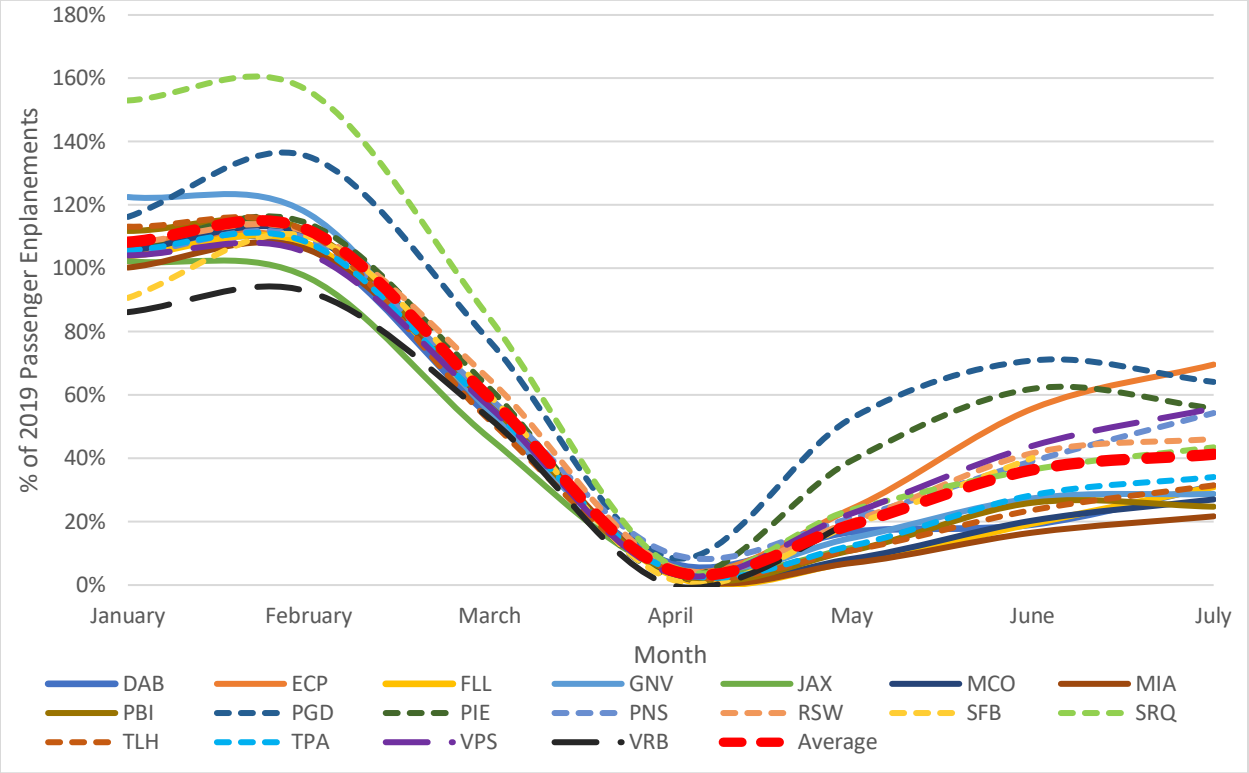
airport's overall revenues, changes to primary revenue streams, and when air traffic and revenues began to decline. Additionally, the project team gathered monthly passenger enplanement data from airport traffic reports to provide context for the loss of revenues.

1.4.2.1. *Impacts to Passenger Enplanements*

Every airport reported a decline in passenger enplanements. Enplanement data indicated that several airports experienced significant year-over-year (YoY) growth in passenger traffic during the first two months of the calendar year, which has lessened the annual impacts in calendar year (CY) 2020. Seventeen airports reported YoY growth in passenger enplanements in January and February, including Sarasota/Bradenton International (SRQ) which reported a 56 percent growth in enplanements from February 2019. In March, passenger enplanements declined significantly at all airports, and enplanements dipped to the lowest point in April. Passenger enplanements at all airports declined more than 90 percent YoY in April. Vero Beach Regional (VRB) indicated that scheduled airline service temporarily ceased in April and passenger enplanements at the airport dropped to zero. Passenger enplanements increased again in May and have, on average, continued to grow; however, the growth slowed in July due to the increase COVID-19 cases in Florida. By July, Northwest Florida Beaches International (ECP) had recovered to 70 percent of the previous year's traffic, the highest traffic level of any airport. Pensacola International (PNS) reached 71 percent of the 2019 traffic in June, but traffic declined at the airport in July. Miami International, meanwhile, recorded the lowest traffic levels of any airport, just 22 percent of the previous year's traffic. Changes to passenger enplanements and flight frequencies are discussed further in **Chapter 2: Air Service Schedule Assessment** and **Chapter 4: Economic Impact Update.** Individual airport passenger enplanements in 2020 compared to the same month of 2019 are illustrated in **Figure 1-2.**[21]

[21] Two airports did not provide monthly enplanement information: Key West International (EYW) and Melbourne International (MLB); however, both provided year-over-year enplanement reductions of 70 percent and 48 percent, respectively. Additionally, Pensacola International (PNS) provided enplanement data April through August, Jacksonville International (JAX) and Vero Beach Regional (VRB) provided data through May, and Orlando-Sanford International (SFB) provided data through June.

Figure 1-2: Year-Over-Year Change in Passenger Enplanements by Airport, 2020



Sources: Airport Monthly Traffic Reports (DAB, ECP, FLL, GNV, JAX, MCO, MIA, PBI, PGD, PIE, PNS, RSW, SFB, SRQ, TLH, TPA, VPS, VRB), 2020

1.4.2.2. *Impacts to Airport Revenues*

Airport representatives were asked to provide information regarding impacts to revenue streams and overall changes in their airport's operating revenues. All 20 surveyed airports reported a reduction in revenues since the beginning of the pandemic, but some airports experienced more severe impacts than others. Annual operating revenue data from fiscal year 2019 (FY 2019) was gathered for each airport prior to the outreach process and airport staff members were asked to provide an estimated change from the FY 2019 revenues or a budgeted operating revenue for FY 2020.

Fort Lauderdale/Hollywood International (FLL) reported the largest relative change between FY 2019 operating revenues and FY 2020 while Sarasota/Bradenton International (SRQ) reported the smallest. Large Hub airports reported the largest average impacts relative to the previous year, while Small Hubs reported the smallest relative change.

Airport representatives were also asked when activity and revenues at their airport began to decline. Some representatives provided specific dates when passenger traffic steeply declined while others identified a one-to-two-week timeframe when activities and revenues began to decline. Orlando International (MCO), for example, reported eight flights canceled on March 12 and 148 cancelations on March 13. Tampa International (TPA) reported the earliest decline as activities began to decrease in the first week of March while Destin-Fort Walton Beach (VPS) reported the latest decline on April 1, which the airport noted aligned with the start of their peak season. The average start day of the decline reported by

survey airports was March 16, which coincides with the implementation of travel restrictions and closure of major resorts in Florida. In general, Large Hub airports reported that activities began to decline earlier than other airports, and Nonhub and Non-Primary airports reported the decline began later in the month.

Each airport's FY 2019 operating revenues, estimated FY 2020 operating revenues, percent decline in revenues from FY 2019, and each airport representative's 's response regarding the start of the decline are presented in **Table 1-2**. Several airports were not able to provide information about the financial impacts of the pandemic and are notated as not provided or NP.

Table 1-2: COVID-19 Financial Impacts by Airport

Airport Name	Associated City	FAA ID	2019 Airport Operating Revenue	Estimated 2020 Airport Operating Revenue	Percent Change Between 2019/2020 Operating Revenue	Decline Started
Daytona Beach International	Daytona Beach	DAB	$ 12,964,503	$ 9,723,377	-25%	Mid-March
Destin-Fort Walton Beach	Destin/Fort Walton Beach	VPS	$ 15,181,842	$ 10,681,842	-30%	April 1
Fort Lauderdale/Hollywood International	Fort Lauderdale	FLL	$ 306,141,000	$ 183,684,600	-40%	Mid-March
Gainesville Regional	Gainesville	GNV	$ 7,200,000	$ 6,200,000	-14%	Late March
Jacksonville International	Jacksonville	JAX	$ 93,182,000	$ 72,500,000	-22%	March 15
Key West International	Key West	EYW	$ 9,000,000	$ 6,000,000	-33%	March 17
Melbourne International	Melbourne	MLB	$ 19,253,397	$ 15,402,718	-20%	March 15
Miami International	Miami	MIA	$ 820,562,000	$ 598,862,000	-27%	Mid-March
Northwest Florida Beaches International	Panama City	ECP	$ 14,042,645	$ 12,000,000	-15%	March 22
Orlando International	Orlando	MCO	$ 581,964,000	$ 454,300,000	-22%	March 13
Orlando Sanford International	Orlando	SFB	$ 14,385,286	$ 11,508,229	-20%	Mid-March
Palm Beach International	West Palm Beach	PBI	$ 71,747,897	$ 53,810,923	-25%	March 16
Pensacola International	Pensacola	PNS	$ 26,834,505	$ 22,460,000	-16%	March 16
Punta Gorda	Punta Gorda	PGD	$ 15,358,981	$ 12,000,000	-22%	March 15
Sarasota/Bradenton International	Sarasota/Bradenton	SRQ	$ 22,523,646	$ 20,500,000	-9%	March 11

Airport Name	Associated City	FAA ID	2019 Airport Operating Revenue	Estimated 2020 Airport Operating Revenue	Percent Change Between 2019/2020 Operating Revenue	Decline Started
Southwest Florida International	Fort Myers	RSW	$ 103,360,000	$ 72,352,000	-30%	Late March
St. Pete-Clearwater International	St. Petersburg/ Clearwater	PIE	$ 15,000,000	$ 12,000,000	-20%	March 22
Tallahassee International	Tallahassee	TLH	$ 13,100,650	$ 9,528,160	-27%	Mid-March
Tampa International	Tampa	TPA	$ 253,462,407	$ 193,645,279	-24%	Early March
Vero Beach Regional	Vero Beach	VRB	$ 3,410,340	NP	NP	Mid-March

Source: COVID-19 Airport Surveys, 2020

1.4.2.3. *Impacts to Primary Airport Revenue Streams*

As previously mentioned, the general financial impacts at each airport are largely dependent on the revenue structure of the airport sponsor. Information about the top three revenues sources at each airport was gathered prior to the outreach process and was confirmed or supplemented during the interviews with airport representatives. Four general sources of revenues were identified through the airport outreach process. These include: (1) airline revenues, which incorporates airline landing fees, airline terminal rentals, and ground handling fees; (2) concession revenues, including terminal rents, revenue sharing, and minimum annual guarantees (MAG), (3) parking revenues, and (4) rental car revenues. Every surveyed airport identified at least one of these four streams as a primary source of revenue at their airport, but a few airports identified other revenues streams that contribute to the airport's funding. Other revenue streams identified during this analysis include fuel sales, ground transportation, and landside commercial rental fees.

The overall financial impacts discussed above were analyzed separately according to the three revenue sources that airport representatives identified as being significant for their airports. In total, 15 airport representatives noted that airline-related revenues provide a major source of operating revenues, 11 identified concession revenues, 14 reported parking lot revenues, 11 reported rental car revenues, and seven reported another revenue stream as a primary source for their airport. It does not appear that the loss of any specific revenue stream had a disproportionate effect on total operating revenues compared to others, as the average total revenue loss reported by airports that identified any of the four revenue streams was within one percent of all other categories.

Each airport representative was asked to identify the impacts of the pandemic on their primary revenue sources as identified prior to the interview. Some airports were able to provide specific year-to-date percent changes for each revenue stream while others provided qualitative responses about the impacts of the pandemic. As such, there is no consistent measure to provide a comparison between the changes in individual revenue streams at all survey airports and therefore these effects are not presented at the individual airport level. However, trends were identified from the quantitative and qualitative responses given by airports. The results of this discussion indicated that impacts to top revenue streams were generally more severe than the overall financial impacts, indicating that the top revenue streams identified at each airport were significantly affected as they are mostly dependent on passenger traffic and other smaller revenue streams such as landside rental fees and ground transportation revenues were less affected. The magnitude of impacts across the three top revenues sources is largely reflective of the overall financial impacts reported at each airport. The sources of revenue that each airport identified as being significant are summarized in **Table 1-3.**

Table 1-3: Top Revenue Sources by Airport

Airport Name	Associated City	FAA ID	Revenue Source				
			Airline Revenues (Landing Fees, Gate Rentals)	Concession Revenues (Terminal Rents, MAGs)	Rental Car Revenues	Parking Lot Revenues	Other Revenues
Daytona Beach International	Daytona Beach	DAB	✓	✓			✓
Destin-Fort Walton Beach	Destin/Fort Walton Beach	VPS	✓		✓	✓	
Fort Lauderdale/ Hollywood International	Fort Lauderdale	FLL		✓	✓	✓	
Gainesville Regional	Gainesville	GNV	✓		✓	✓	
Jacksonville International	Jacksonville	JAX		✓	✓		✓
Key West International	Key West	EYW	✓		✓	✓	
Melbourne International	Melbourne	MLB	✓		✓	✓	
Miami International	Miami	MIA	✓	✓			✓
Northwest Florida Beaches International	Panama City	ECP	✓	✓	✓		
Orlando International	Orlando	MCO	✓	✓			✓
Orlando Sanford International	Orlando	SFB	✓	✓			✓
Palm Beach International	West Palm Beach	PBI	✓	✓	✓		
Pensacola International	Pensacola	PNS	✓		✓	✓	

Airport Name	Associated City	FAA ID	Revenue Source				
			Airline Revenues (Landing Fees, Gate Rentals)	Concession Revenues (Terminal Rents, MAGs)	Rental Car Revenues	Parking Lot Revenues	Other Revenues
Punta Gorda	Punta Gorda	PGD	✓				✓
Sarasota/Bradenton International	Sarasota/Bradenton	SRQ		✓	✓	✓	
Southwest Florida International	Fort Myers	RSW	✓		✓	✓	
St. Pete-Clearwater International	St. Petersburg/ Clearwater	PIE		✓	✓	✓	
Tallahassee International	Tallahassee	TLH	✓		✓	✓	
Tampa International	Tampa	TPA	✓		✓	✓	
Vero Beach Regional	Vero Beach	VRB		✓			✓
		Total	**15**	**11**	**14**	**11**	**7**

Source: COVID-19 Airport Surveys, 2020

1.4.2.4. *Passenger Enplanement and Revenue Impacts Summary*

The timelines of declines in passenger enplanements and airport revenues are generally similar. However, the impacts to passenger traffic appear to be more severe than impacts to revenues. This is due in part to the passenger enplanement impacts being reported in calendar year 2020 (January-December), while airports reported financial impacts over fiscal year 2020 (October 1, 2019-September 30, 2020). As such, airports only reported two months of enplanement growth (January and February 2020) while they reported five months of financial growth prior to the start pandemic (October 2019 through February 2020). These months of growth offset the loss of revenues after the pandemic began, reducing the annual impacts of the pandemic. Additionally, airport revenues were sheltered from the severe decline in passenger enplanements as airlines still paid landing fees even if the aircraft were nearly empty. However, airports did lose revenues because of Minimum annual guarantee (MAG) waivers and tenant rent abatement. Several airport representatives did note that the impacts to annual operating revenues could be more severe in FY 2021 than in FY 2020 as traffic levels will remain depressed for the foreseeable future. Forecasted traffic levels will be discussed in further detail in **Chapter 3: Airport Forecasts and Recovery**.

1.4.3. Impacts to Airport Funding and Capital Development

The loss of passenger and aircraft traffic resulting from the pandemic has not only affected revenues at airports but also the revenues of several local, state, and federal funding agencies. Airport representatives and staff have acted quickly to adjust operating and capital development budgets in an effort to cut costs and remain operational. This has caused a number of ongoing projects to be delayed and airport sponsors to reshuffle or cancel future development projects in anticipation of reduced future funding. Additionally, the loss of traffic at airports has caused concessionaires and business tenants to lose revenues and has forced these businesses to seek rent abatements, deferrals or minimum annual guarantee (MAG) waivers. However, there have been some benefits that resulted from the pandemic, as some airports have been able to expedite improvement projects and have received generous aid from the FAA's Coronavirus Aid, Relief, and Economic Security (CARES) Act. The impacts of the CARES Act, rent abatements, and the pandemic's impacts on capital development are discussed in the following sections.

1.4.3.1. *CARES Act*

Every surveyed airport received funding from the FAA's CARES Act and each airport representative reported that the funding provided much needed assistance during the economic downturn. The Act was signed into law on March 27, 2020 by President Trump and allotted $10 billion in funds to the FAA to distribute to eligible airports and airlines to provide economic relief. This includes $901 million in funds that were allotted for the 20 commercial service airports in Florida. The FAA is also using CARES Act funds to increase the federal share of Airport Improvement Program (AIP) and supplemental discretionary grants already planned for FY 2020 to 100 percent.

Airport representatives were invited to discuss how they were spending or planning to spend their airport's CARES Act funding. The questionnaire separated the use of funds into three general categories: (1) operating expenses including payroll, (2) debt service, and (3) capital development projects. All 20 surveyed airports indicated that they were using or planning to use CARES Act funding on operating expenses, however, several airports indicated that they would be splitting the funds to utilize them for multiple purposes. Nine airports indicated that they would use the funding to cover debt service in

addition to operating expenses while three airports reported they planned to spend CARES funding on capital projects and operating expenses. Finally, one airport indicated that the CARES funding would be utilized to cover operating expenses, debt service, and capital improvement projects.

Although all airports plan to use CARES Act funding for operating expenses, the time period and extent to which airports will utilize the funds varied between each airport, primarily due to differences in funding given to each airport. Miami International (MIA) received the largest sum of funding ($206,949,557) while Vero Beach Regional (VRB) received the least ($1,042,438). However, airports with more CARES Act funds are not necessarily using the funding over a longer period, as MIA plans to spend the entirety of the funds by October 1, 2020, while Northwest Florida Beaches International (ECP) plans to use the funds over three years despite receiving only $6.3 million in CARES Act funding. Sarasota/Bradenton International (SRQ) and Tallahassee International (TLH) indicated that they plan to use CARES Act funding over four years, the longest time period reported by any surveyed airport. The amount of CARES Act funding that each airport received is summarized in **Table 1-4** along with each airport's response to how they plan to utilize the funding.

Table 1-4: Use of CARES Act Funding by Airport

Airport Name	Associated City	FAA ID	CARES Act Funding Amount	How is the Airport Utilizing CARES Act Funds?
Daytona Beach International	Daytona Beach	DAB	$ 21,053,492	Operating Expenses
Destin-Fort Walton Beach	Destin/Fort Walton Beach	VPS	$ 12,429,334	Debt Service, Operating Expenses
Fort Lauderdale/ Hollywood International	Fort Lauderdale	FLL	$ 134,958,902	Operating Expenses
Gainesville Regional	Gainesville	GNV	$ 3,113,693	Debt Service, Operating Expenses
Jacksonville International	Jacksonville	JAX	$ 28,169,797	Debt Service, Capital Projects, Operating Expenses
Key West International	Key West	EYW	$ 21,789,697	Operating Expenses, Capital Projects
Melbourne International	Melbourne	MLB	$ 19,823,709	Operating Expenses
Miami International	Miami	MIA	$ 206,949,557	Debt Service, Operating Expenses
Northwest Florida Beaches International	Panama City	ECP	$ 6,327,925	Debt Service, Operating Expenses
Orlando International	Orlando	MCO	$ 170,702,779	Debt Service, Operating Expenses
Orlando Sanford International	Orlando	SFB	$ 22,742,502	Debt Service, Operating Expenses
Palm Beach International	West Palm Beach	PBI	$ 36,613,068	Debt Service, Operating Expenses

Pensacola International	Pensacola	PNS	$ 11,081,566	Operating Expenses
Punta Gorda	Punta Gorda	PGD	$ 23,846,735	Debt Service, Operating Expenses
Sarasota/Bradenton International	Sarasota/Bradenton	SRQ	$ 23,294,336	Operating Expenses
Southwest Florida International	Fort Myers	RSW	$ 36,603,212	Operating Expenses
St. Pete-Clearwater International	St. Petersburg/ Clearwater	PIE	$ 8,737,268	Operating Expenses
Tallahassee International	Tallahassee	TLH	$ 21,213,414	Operating Expenses, Capital Projects
Tampa International	Tampa	TPA	$ 81,029,598	Debt Service, Operating Expenses
Vero Beach Regional	Vero Beach	VRB	$ 1,042,438	Capital Projects, Operating Expenses
Total CARES Act Funding			**$901,523,022**	

Source: FAA, 2020; COVID-19 Airport Survey, 2020

It is important to note that a second economic relief package is being considered in Congress as of September 2020. Legislation details are still unknown, but it is likely that the bill would again allocate funds to airports and airlines affected by the pandemic. It is unknown at this time what level of support these businesses and airports would receive from the relief package or when it will be passed, but several airport representatives noted that such relief would be critical to the future financial wellbeing of their airport.

1.4.3.2. *Business Tenant Economic Relief*

One of the purposes of the CARES Act was for airport sponsors who received funding needed to pass the economic relief on to business tenants at their airport. Most airport sponsors have achieved this by offering rent abatement or deferrals to tenants or waiving MAGs. Airport representatives were asked to identify whether or not their airport's sponsoring entity was offering rent deferrals, rent abatements, or MAG waivers, and to give details regarding the extent of the economic relief and if/how their airport sponsor plans to recoup the revenues.

All but two surveyed representatives reported that their airport was providing some form economic relief to their business tenants. Among the 18 airports that assisted tenants, there was significant variation between the types and magnitude of assistance offered. Most airports provided more than one form of aid depending on the type of businesses that needed assistance. Two airports – Orlando International (MCO) and Tallahassee International (TLH) indicated that they had offered some level of economic relief to all of their business tenants. Several airports noted that assistance was offered to terminal tenants including concessionaires and rental cars as they have been heavily impacted by the loss of passenger traffic. Airlines also received rent assistance as both a form of economic relief and as an incentive to grow air service. In total, 13 airport reported offering rent deferrals, five airports reported offering rent abatement, and 11 airports reported waiving MAG.

Rent deferrals allow airports to aid struggling business tenants while not forgoing revenues. As such, deferrals are preferred as airport sponsors often have grant obligations or other mandates that require their agency to pursue all available revenue streams. Deferrals provide short term economic relief for businesses and then allow them to repay their owed rental payments over a longer time period, often without accruing interest. Of the 13 total airports that reported offering rent deferrals, six offered deferrals to all tenants, four offered to only airlines, one offered to only concessions, one offered to airlines and concessions, and one airport offered deferrals to concessionaires and rental car companies.

Airport representatives were also invited to provide information regarding the term of repayment for deferred rents. Eight airports gave information regarding the length of deferment and the time period when repayment would take place. Of these, six indicated they were deferring rent for two-three months (usually between April and June), while two airports indicated they were providing deferment for six months ending September 30. Repayment times ranged between three months (St. Pete-Clearwater International (PIE)) and 12 months (MCO). All six representatives that provided information about their airport's repayment requirements indicated that they would receive repayments in full by September 1, 2021.

Airports were determined to have offered rent abatements to business tenants when they reduced or eliminated monthly rental fees without any requirement to repay the abated rent at a later date. Five airport managers indicated that they were offering some level of rent abatements to their tenants. Miami International (MIA) indicated that they are providing varying level of rent abatements for all rental car companies and concessionaires through end of the calendar year. Gainesville Regional (GNV), meanwhile, reported that they were providing a 25 percent rent reduction for all rental car operators, food concessionaires, and airlines between April and June. Daytona Beach International (DAB) indicated that their airport was using rent abatements as an incentive to attract airlines to resume service at their airport. Finally, Sarasota/Bradenton International (SRQ) noted that they have provided rent abatements to airport tenants and all advertisers at the airport.

MCO noted that they were providing concessionaires the choice between receiving rent deferrals or abatements. Tenants that requested rent deferrals were provided three months of assistance to be repaid over 12 months starting September 1 and were offered an automatic three-month extension to their existing lease. Tenants that requested abatements also received three months of rent relief but had their lease shortened by 3 months. In all, 13 concessionaires at MCO requested deferrals while eight requested abatement. In addition, MCO provided 90 days of rent deferrals for airlines, but still required the carriers to pay facility usage fees.

MAG waivers provide economic relief for business tenants that have percentage-based lease contracts. Under normal circumstances, these businesses agree to pay the airport a certain percentage of their monthly sales and to pay a minimum amount to the airport each year regardless of the amount of sales that the business makes. This allows airports to maintain a consistent revenue stream regardless of traffic levels. However, three airport representatives indicated that their airports had clauses in their business tenant lease contracts that automatically eliminated the MAG if passenger traffic at their airport declined past a certain threshold.

Of the 12 airports that waived MAGs, four airports indicated that they were providing MAG waivers to terminal concessionaires and rental car operators, while three airports have provided waivers only to concessionaires and one airport has waived MAGs only to rental car companies. The four remaining airports did not indicate whether MAG waivers were being offered to any specific business types, and therefore it was assumed that the waivers are available to all eligible business tenants. Four airports indicated that they had provided three months of MAG waivers, most commonly between April and June. MIA and Northwest Florida Beaches International (ECP) noted that they had originally waived MAGs for three months but extended the waivers through end of the calendar year. Finally, Palm Beach International (PBI), Pensacola International (PNS), St. Pete-Clearwater International (PIE) and Southwest Florida International (RSW) indicated that MAGs at their airport were automatically eliminated when traffic decreased, meaning the waivers will continue until passenger traffic returns to near pre-pandemic levels.

Table 1-5 summarizes the responses from the 20 surveyed airports regarding the provision of rent deferrals, abatements, and/or MAG waivers for their business tenants.

Table 1-5: Provision of Rent Deferrals, Abatements and MAG Waivers for Businesses Tenants by Airport

Airport Name	Associated City	FAA ID	Is Your Airport Providing Rent Deferrals?	Is Your Airport Providing Rent Abatements?	Is Your Airport Waiving MAGs?
Daytona Beach International	Daytona Beach	DAB	No	Yes	Yes
Destin-Fort Walton Beach	Destin/Fort Walton Beach	VPS	No	No	No
Fort Lauderdale/Hollywood International	Fort Lauderdale	FLL	Yes	No	Yes
Gainesville Regional	Gainesville	GNV	No	Yes	Yes
Jacksonville International	Jacksonville	JAX	Yes	No	Yes
Key West International	Key West	EYW	Yes	No	No
Melbourne International	Melbourne	MLB	Yes	No	No
Miami International	Miami	MIA	Yes	Yes	Yes
Northwest Florida Beaches International	Panama City	ECP	No	No	Yes
Orlando International	Orlando	MCO	Yes	No	Yes
Orlando Sanford International	Orlando	SFB	Yes	No	No
Palm Beach International	West Palm Beach	PBI	Yes	No	Yes
Pensacola International	Pensacola	PNS	No	No	Yes
Punta Gorda	Punta Gorda	PGD	No	No	No
Sarasota/Bradenton International	Sarasota/Bradenton	SRQ	Yes	Yes	No
Southwest Florida International	Fort Myers	RSW	No	No	Yes
St. Pete-Clearwater International	St. Petersburg/Clearwater	PIE	Yes	No	Yes
Tallahassee International	Tallahassee	TLH	Yes	No	Yes
Tampa International	Tampa	TPA	No	Yes	No
Vero Beach Regional	Vero Beach	VRB	Yes	No	No

Source: COVID-19 Airport Surveys, 2020

1.4.3.3. *Existing and Future Capital Development Projects*

The economic and social restrictions implemented in response to the pandemic have disrupted countless business sectors beyond the aviation industry. As such, there have been numerous interruptions in supply chains and work force supply that have affected construction and development projects at airports. Additionally, the loss of revenues among funding agencies has created issues as local, state, and federal grants for development projects have been retracted or canceled. This has caused ongoing projects in the design or construction phase to be halted until appropriate materials, funding, and personnel are available for the project. In the context of this analysis, airport representatives were asked to give details regarding whether or not projects have been delayed, held indefinitely or canceled, the types and estimated cost of projects affected, and if any projects have been expedited.

Fifteen of the 20 surveyed airports reported that they delayed or held development projects in some capacity. Of these, 13 airports provided information about specific projects that had been delayed and 11 airports gave an estimated cost of delayed or canceled projects. Seven airports reported that terminal or concourse projects have been delayed, three airports are delaying or holding airside surface projects, two airports reported delayed projects for Customs and Border Patrol facilities, and eight airports reported delayed miscellaneous maintenance and expansion projects. Among the 20 surveyed airports, an estimated $2.06 billion worth of projects were either delayed temporarily or put on indefinite hold.

Seven representatives reported that projects related to their passenger terminals were being delayed, including terminal maintenance projects, existing terminal expansions, and construction of new terminals or concourses. Notable terminal projects that have been affected include future construction of a new 16-gate international terminal at Tampa International (TPA), installation of new baggage handling systems at Southwest Florida International (RSW) and at Gainesville Regional (GNV), and the completion of a $226 million terminal construction project at Orlando International (MCO). MCO staff added that the scope of the terminal project has been revised from the original plan for 19 gates and 27 aircraft parking spots to only 15 gates and 19 aircraft parking spots. Airport representatives provided several reasons for these delays, including loss of revenues from passenger facility charges (PFCs), loss of local funding due to budget freezes, changes to Capital Improvement Programs (CIPs), and proposed construction areas being repurposed to accommodate passenger isolation rooms.

Three airport representatives indicated that their airport was holding or delaying projects related to airside pavement surfaces. One example is a taxiway project at Orlando Sanford International (SFB) that was originally scheduled to be completely funded in one year but had to be split into three phases to be completed over the next three years because of reduced funding availability. Other delayed pavement projects include a $1.6 million ramp expansion project at Northwest Florida International (ECP) that was held because of delays in the design phase of the project. Finally, Punta Gorda (PGD) reported that they held construction of a general aviation ramp and hangar for three months during the initial stages of the pandemic but have since resumed the construction project.

Eight airports identified an assortment of maintenance and expansion projects that have been affected by the pandemic. Notable projects include construction of an air traffic control tower upgrade at Tallahassee International (TLH), construction of an observation park adjacent to Sarasota/Bradenton International (SRQ), and construction of a parking lot at Punta Gorda (PGD). Other airports reported temporary holds on small maintenance projects due to uncertain circumstances at the beginning of the crisis.

Despite the economic disruptions in the aviation industry, many airports have been able to expedite capital development projects due to reduced passenger traffic and new funding streams. In all, nine airports reported that they had expedited or were planning to expedite projects. Of these, three airports are expediting terminal or concourse renovation projects including restrooms and jet bridge renovations, three airports are expediting terminal or concourse expansion projects, and one airport (Fort Lauderdale/Hollywood International [FLL]) is expediting a program definition document that will enable the airport to move forward on construction of a new terminal. Other airports added that they are completing smaller maintenance projects including a parking lot overlay and installation of new air conditioning units on jet bridges.

Trends were identified from airport representatives' responses regarding delayed capital development projects. Several airport representatives indicated that their airports were moving forward with projects that were in the design phase or were necessary to accommodate for future expansion projects. Of the projects that had already started construction or are planned to begin in the immediate future, projects related to airport safety and efficiency were less likely to be delayed. Most airport representatives reported that their airports were delaying expansion projects including the construction of new landside facilities and parking lots. However, a few airport representatives indicated that their facilities were already nearing capacity because of growth in recent years and that they planned to utilize the period of depressed passenger traffic to expand their facilities to meet future demand.

Table 1-6 summarizes the impacts to capital development projects at each airport, the estimated costs of delayed projects at each airport, and whether or not each airport is expediting capital development projects. Five airports reported that no projects were delayed, and as such, their response to the estimated total cost of delayed projects are indicated as "Not Applicable" (N/A). Additionally, four airports that have delayed projects did not provide estimated costs for their delayed projects. These airports' responses are indicated as NP.

Table 1-6: Impacts to Airport Capital Development Projects

Airport Name	Associated City	FAA ID	Is Your Airport Holding or Delaying Capital Development projects?	Estimated Total Cost of Delayed Projects	Is Your Airport Expediting Capital Development Projects?
Daytona Beach International	Daytona Beach	DAB	No	N/A	Yes
Destin-Fort Walton Beach	Destin/Fort Walton Beach	VPS	No	N/A	Yes
Fort Lauderdale/Hollywood International	Fort Lauderdale	FLL	Yes	NP	Yes
Gainesville Regional	Gainesville	GNV	Yes	$ 21,000,000	Yes
Jacksonville International	Jacksonville	JAX	Yes	$ 250,000,000	No
Key West International	Key West	EYW	No	N/A	Yes
Melbourne International	Melbourne	MLB	No	N/A	No
Miami International	Miami	MIA	No	N/A	Yes
Northwest Florida Beaches International	Panama City	ECP	Yes	$ 1,600,000	Yes
Orlando International	Orlando	MCO	Yes	$ 360,000,000	No
Orlando Sanford International	Orlando	SFB	Yes	NP	No
Palm Beach International	West Palm Beach	PBI	Yes	$ 5,000,000	Yes
Pensacola International	Pensacola	PNS	Yes	$ 3,000,000	No
Punta Gorda	Punta Gorda	PGD	Yes	$ 15,000,000	No
Sarasota/Bradenton International	Sarasota/Bradenton	SRQ	Yes	$ 1,600,000	Yes
Southwest Florida International	Fort Myers	RSW	Yes	$ 500,000,000	No
St. Pete-Clearwater International	St. Petersburg/ Clearwater	PIE	Yes	$ 800,000	No
Tallahassee International	Tallahassee	TLH	Yes	NP	No
Tampa International	Tampa	TPA	Yes	$ 905,000,000	No
Vero Beach Regional	Vero Beach	VRB	Yes	NP	No

Source: COVID-19 Airport Surveys, 2020

1.4.4. Impacts to Airport and Tenant Staffing

The economic downturn caused by the pandemic has resulted in many temporary or permanent business closures at airports, causing thousands of aviation industry employees to lose their jobs. In this analysis, airport representatives were asked to provide information regarding whether the airport (airport authority or local sponsor) made staffing changes as well as if business tenants made staffing changes. The airports and business sectors that have been most affected are briefly discussed below along with trends identified through industry research.

1.4.4.1. *Airport Staffing Changes*

Despite the loss of passenger traffic and associated revenues, only three surveyed airports reported making temporary or permanent staffing changes. These airports include Fort Lauderdale/Hollywood International (FLL), Key West International (EYW), and Punta Gorda (PGD). FLL reported that the airport was maintaining 90 percent of its staff from pre-pandemic levels but was reducing hours for part-time staff and experienced some resignations and retirements. EYW indicated that the airport had laid off three staff members but planned to bring back one position if passenger traffic returns. Finally, PGD reported that they reduced all full-time staff to 32 hours per week and furloughed one staff member. Multiple airports noted that their airport sponsor and/or local municipality implemented hiring freezes, meaning that any positions that opened or were unfilled at the beginning of the crisis have not been filled, causing staffing shortages for some airports. Many airport representatives also cited CARES Act funding as a reason that staffing changes had not been made. The CARES Act requires Small, Medium, and Large Hub airports to maintain at least 90 percent of their employees (employed as of March 27) through December 31. After that date, airport staffing changes may be made if additional funding is not provided and passenger traffic does not return.

1.4.4.2. *Business Tenant Staffing Changes*

Unfortunately, airport business tenants have not been as sheltered from staffing reductions as much as airport operators. Nineteen of the 20 surveyed airport representatives indicated that tenants had made changes to their staffing levels. Each airport provided slightly different information about tenant's staffing changes; however, most airports gave information about specific business sectors that were affected. Three airports reported that all or nearly all tenants made staffing changes at some level, while five airports indicated that airlines made staffing cuts, 10 airports noted that concessionaires made staffing changes, seven airports reported staffing changes to car rental companies, and five airports reported staffing changes in other sectors.

Business sectors that have been disproportionately affected by the pandemic were identified from the responses of the 20 survey airports and industry research. Airlines, concessionaires, and car rental operators appear to have been the most severely impacted of any specific business sectors at airports. As these companies are heavily reliant on passenger traffic volumes, they felt the effects of the crisis at the same time as airports and have borne the brunt of economic impacts. Although many airline car rental and concessions tenants received economic assistance from airports, it was financially impractical or impossible for them to maintain pre-pandemic staffing levels or to operate at all. Additionally, airlines that received funding from the CARES Act are required to maintain at least 90 percent of pre-pandemic staffing levels through September 30, and after this date it is predicted that many airlines will implement

significant staffing changes. The specific impacts on each of these business sectors are analyzed in greater detail in **Chapter 4: Economic Impact Update.**

Many of the airports that reported tenant staffing changes noted that the staffing reductions were caused by temporary or permanent business closures at their airports. Three airports reported concessionaires and business tenants reduced operating hours while five airports reported that concessionaires or other businesses closed temporarily between April and August. Business closures were caused by either a lack of traffic at each individual concessionaire, or because the airport closed portions of the terminal or concourse. Most airports did note that concessionaires have started to reopen, but very few have returned to pre-pandemic staffing levels.

Changes to staffing levels among the 20 surveyed airports and their respective business tenants are presented in **Table 1-7**. EYW did not provide information regarding changes to business tenant staffing and as such, their response has been indicated as "NP".

Table 1-7: Airport and Business Tenant Staffing Changes

Airport Name	Associated City	FAA ID	Did Your Airport Make Staffing Changes?	Did Business Tenants at Your Airport Make Staffing Changes?
Daytona Beach International	Daytona Beach	DAB	No	Yes
Destin-Fort Walton Beach	Destin/Fort Walton Beach	VPS	No	Yes
Fort Lauderdale/ Hollywood International	Fort Lauderdale	FLL	Yes	Yes
Gainesville Regional	Gainesville	GNV	No	Yes
Jacksonville International	Jacksonville	JAX	No	Yes
Key West International	Key West	EYW	Yes	NP
Melbourne International	Melbourne	MLB	No	Yes
Miami International	Miami	MIA	No	Yes
Northwest Florida Beaches International	Panama City	ECP	No	Yes
Orlando International	Orlando	MCO	No	Yes
Orlando Sanford International	Orlando	SFB	No	Yes
Palm Beach International	West Palm Beach	PBI	No	Yes

Airport Name	Associated City	FAA ID	Did Your Airport Make Staffing Changes?	Did Business Tenants at Your Airport Make Staffing Changes?
Pensacola International	Pensacola	PNS	No	Yes
Punta Gorda	Punta Gorda	PGD	Yes	Yes
Sarasota/Bradenton International	Sarasota/Bradenton	SRQ	No	Yes
Southwest Florida International	Fort Myers	RSW	No	Yes
St. Pete-Clearwater International	St. Petersburg/ Clearwater	PIE	No	Yes
Tallahassee International	Tallahassee	TLH	No	Yes
Tampa International	Tampa	TPA	No	Yes
Vero Beach Regional	Vero Beach	VRB	No	Yes

Source: COVID-19 Airport Surveys, 2020

1.4.5. Overall Impact Ratings

Each airport representative was asked to provide a rating on a scale of one to 10 (one representing the least severe impacts and 10 representing the most) in terms of the pandemic's impacts on their airport's overall finances, operations, and the status of existing and future capital development projects.

Nineteen of the 20 airports interviewed provided ratings for this analysis. The 19 airports provided an average financial rating of 7.76. Four airports rated the financial impacts as a 10, while 14 airports reported a rating between five and nine. Four airports also reported an operational impact rating of 10 and all but one airport rated the operational impacts above a four, but the average reported rating was a 7.61, lower than the average financial impact rating. The impacts on existing capital development projects were given an average rating of 5.37, signifying that existing capital project impacts were generally less severe compared to the operational and financial impacts of the pandemic. However, the average rating of the impacts to future capital development projects was 7.11, and six airports rated the impacts as a 10, which indicates that airports are concerned that future funding streams may be affected by the pandemic. These impact ratings provided a subjective analysis of the pandemic's effects on airports, and, as such, a comparison of impact ratings at individual airports cannot be conducted. However, several trends were identified based on airport hub size.

Medium hub airports reported the highest average rating across all four impacts categories. Financial impact ratings, existing operational impact ratings, and capital development impact ratings follow the same pattern as the overall impacts as Medium Hub airports reported the greatest average financial impact ratings and Non-Primary airports reported the lowest. Medium Hub airports once again reported the highest operational impact rating; however, Small Hub airports reported the lowest average operational impact. Finally, Large Hub airports reported the highest average rating to future capital development projects while Non-Primary airports reported the smallest. The trends are largely indicative of the levels of activity at airports, as busier airports are more heavily impacted than smaller airports. However, the Large Hub airports appear to be somewhat isolated from the most severe impacts of the pandemic. The average impacts ratings are summarized by NPIAS classification in **Table 1-8.**

Table 1-8: Average Impact Ratings by Hub Size

Hub Size (Number of airports)	Average Financial Impact Rating (1-10)	Average Operational Impact Rating (1-10)	Average Existing CIP Impact Rating (1-10)	Average Future CIP Impact Rating (1-10)
Large (4)	8.50	7.33	5.00	9.67
Medium (3)	9.33	9.33	8.33	9.33
Small (7)	6.57	5.93	3.14	4.42
Non (5)	9.00	9.20	7.60	9.20
Non-Primary (1)	3.00	7.00	2.00	1.00
All Airports	**7.76**	**7.61**	**5.37**	**7.11**

Source: COVID-19 Airport Surveys; Kimley-Horn, 2020

1.5. Airport Pandemic Response Plans

One of the hallmarks of any successful business or organization is the ability adapt and respond to new or challenging situations. The commercial aviation industry has shifted from a period of record growth to a time of uncertainty and low public confidence. Fortunately, Florida's commercial service airports have been up to the task to react and evolve to maintain a safe and effective operational status. During this analysis, airport representatives and staff were asked to provide detail about how their airports are protecting customers and staff from transmitting COVID-19 and preparing to return to a new normal of airline operations. Some notable portions of each airport's pandemic safety plan is discussed below along with a brief overview of airport recovery plans.

1.5.1. Airport Pandemic Safety Plans

In May, in order to assist airport representatives in crafting safety plans and other pandemic response procedures, the Florida Airports Council (FAC) surveyed the 20 commercial service airports in Florida and gathered information from all 20 specific to how each airport was preventing the spread of COVID-19 in their facilities. This information from FAC was included in each airport's questionnaire and each representative was asked to confirm the data during the outreach interviews. All airports indicated that they have dedicated response plans of some type, however, some airports are adhering to health directives implemented by their local municipality rather than developing a health plan specific to the airport.

The FAC survey asked airports to identify three specific components of their pandemic safety plan: (1) facial covering (mask) guidelines, (2) social distancing signage, markings, and protective shields, and (3) cleaning procedures at the airport. In total, 15 airports require all persons to wear face coverings while in the terminal while six airports only require employees to wear coverings and recommend passengers follow suit. Three airports have no requirement for passengers or staff, but highly recommend wearing coverings. Additionally, seven airports have implemented voluntary or compulsory health screenings or temperature checks for employees before each shift.

All 20 airports indicated that they had posted social distancing signage and markings in public areas and many had installed Plexiglas barriers at various locations in the terminal including airline ticket counters, gates, checkpoints, and concessionaires. Once again, all 20 airport representatives indicated that their airport had implemented enhanced cleaning procedures in their terminals and airport buildings. Notable cleaning programs include the use of electrostatic spraying in airline hold rooms and at checkpoints, installation of ultraviolet (UV) lights in air conditioning units to improve clean air flow, and nightly fogging of public areas to provide a deep cleaning of all exposed surfaces.

Several airports have also formed partnerships or completed certifications to boost public confidence in their facility. Three airports reported that that they were pursuing the Global Biorisk Advisory Council (GBAC)'s STAR™ certification that indicates heightened levels of sanitation at each airport. However, at the time of the survey, Palm Beach International (PBI) was the only airport in the state to obtain the certification. Other notable safety campaigns include a potential partnership with Clorox at Gainesville Regional (GNV) to provide electrostatic spraying equipment to the airport and the distribution of "Cares Kits" at Daytona Beach International (DAB) that include DAB-branded hand sanitizers, masks, mints, and luggage tags.

Some airports also implemented standard operating procedures (SOPs) for airlines to further ensure that airline staff, passengers, and airport employees are protected from contracting COVID-19. Eight of the 20 airports indicated that they have SOPs with airlines. Most of these SOPs are related to transmission barriers and social distancing signage at ticket counters and gates. Several of the airport representatives that have not implemented SOPs noted that airlines' COVID-19 policies are more stringent than their own airport's and therefore, SOPs are not needed.

Table 1-9 summarizes the responses of each airport regarding their pandemic safety plan, specifically facial covering requirements, new cleaning procedures, social distancing signage, and employee health screenings.

Table 1-9: Airport Pandemic Safety Procedures

Airport Name	Associated City	FAA ID	Are Facial Coverings Required in Your Terminal?	Has Your Airport Implemented New Cleaning Procedures?	Has Your Airport Installed Social Distancing Markings and Signage?	Is Your Airport Conducting Employee Health Screenings?
Daytona Beach International	Daytona Beach	DAB	No	Yes	Yes	No
Destin-Fort Walton Beach	Destin/Fort Walton Beach	VPS	Yes	Yes	Yes	No
Fort Lauderdale/Hollywood International	Fort Lauderdale	FLL	Yes	Yes	Yes	No
Gainesville Regional	Gainesville	GNV	Yes	Yes	Yes	No
Jacksonville International	Jacksonville	JAX	Yes	Yes	Yes	Yes
Key West International	Key West	EYW	Yes	Yes	Yes	No
Melbourne International	Melbourne	MLB	No	Yes	Yes	Yes
Miami International	Miami	MIA	Yes	Yes	Yes	No
Northwest Florida Beaches International	Panama City	ECP	Yes	Yes	Yes	No
Orlando International	Orlando	MCO	No	Yes	Yes	No
Orlando Sanford International	Orlando	SFB	Yes	Yes	Yes	No
Palm Beach International	West Palm Beach	PBI	Yes	Yes	Yes	No
Pensacola International	Pensacola	PNS	Yes	Yes	Yes	Yes
Punta Gorda	Punta Gorda	PGD	No	Yes	Yes	No
Sarasota/Bradenton International	Sarasota/Bradenton	SRQ	Yes	Yes	Yes	Yes
Southwest Florida International	Fort Myers	RSW	No	Yes	Yes	No
St. Pete-Clearwater International	St. Petersburg/ Clearwater	PIE	Yes	Yes	Yes	Yes
Tallahassee International	Tallahassee	TLH	Yes	Yes	Yes	Yes
Tampa International	Tampa	TPA	No	Yes	Yes	No
Vero Beach Regional	Vero Beach	VRB	Yes	Yes	Yes	Yes

Source: COVID-19 Airport Surveys, 2020

1.5.2. Airport Recovery Plans

As of September 2020, the first wave of the COVID-19 appears to have passed in parts of the U.S. as daily new case rates have continued to decline. As such, the U.S. economy and the global airline industry have looked toward recovery to pre-pandemic activities. Airport representatives were asked to provide information about their airport's recovery plans and any forecasted recovery scenarios. In total, 15 representatives indicated that airport staff had developed a recovery plan with forecasted scenarios. The details of these plans are discussed in further detail in **Chapter 3: Airport Forecasts and Recovery**. **Table 1-10** presents the responses of each representative regarding forecasted recovery scenarios at their airport.

Table 1-10: Forecasted Recovery Scenarios by Airport

Airport Name	Associated City	FAA ID	Has Your Airport Developed Forecasted Recovery Scenarios?
Daytona Beach International	Daytona Beach	DAB	Yes
Destin-Fort Walton Beach	Destin/Fort Walton Beach	VPS	Yes
Fort Lauderdale/Hollywood International	Fort Lauderdale	FLL	Yes
Gainesville Regional	Gainesville	GNV	Yes
Jacksonville International	Jacksonville	JAX	Yes
Key West International	Key West	EYW	Yes
Melbourne International	Melbourne	MLB	Yes
Miami International	Miami	MIA	Yes
Northwest Florida Beaches International	Panama City	ECP	No
Orlando International	Orlando	MCO	Yes
Orlando Sanford International	Orlando	SFB	Yes
Palm Beach International	West Palm Beach	PBI	Yes
Pensacola International	Pensacola	PNS	Yes
Punta Gorda	Punta Gorda	PGD	No
Sarasota/Bradenton International	Sarasota/Bradenton	SRQ	Yes
Southwest Florida International	Fort Myers	RSW	No
St. Pete-Clearwater International	St. Petersburg/ Clearwater	PIE	Yes
Tallahassee International	Tallahassee	TLH	Yes
Tampa International	Tampa	TPA	No
Vero Beach Regional	Vero Beach	VRB	No

Source: COVID-19 Airport Surveys, 2020

1.6. Impacts to Industry Organizations

In addition to the significant outreach process to Florida's commercial service airports, multiple industry organizations were identified during the initial stages of the analysis to provide supplementary information about industry-wide and Florida-specific impacts. The five industry organizations considered in this analysis included the American Association of Airport Executives (AAAE), the Airport Consultants Council (ACC), Airports Council International-North America (ACI-NA), the Florida Airports Council (FAC), and the Florida Aviation Business Association (FABA). Questionnaires were developed and prepopulated with information from each organization's website. These questionnaires were then sent to representatives of each organization to confirm the information was correct. Industry representatives then added any additional information, and, if necessary, calls were conducted to gather any additional information. The questionnaires included information regarding the impacts to each organization's scheduled meetings and events, whether or not the organization has conducted any research or surveys related to the impacts of the pandemic or if they have formed a COVID-19 response taskforce or focus group, and any recovery scenarios that the organization developed.

1.6.1. Impacts to Organization Operations and Meetings

All five of the organizations included in the industry outreach analysis have full-time staff members that serve airports and aviation professionals through a variety of seminars, trainings, and conferences. Unfortunately, the pandemic has created significant disruptions to the normal operations of these organizations and has caused multiple meetings and conferences to be canceled. All five organizations reported that their 2020 annual conferences were canceled, including three conferences scheduled to be held in Florida. ACC staff noted that their annual conference was being held virtually in lieu of their normal conference. Four of the five organizations added that they had created or hosted multiple virtual seminars or trainings that were made available to members in place of traditional in-person meetings. Additionally, three of the organizations indicated that their full-time staff was working from home to preserve budget and to prevent the spread of COVID-19.

1.6.2. Industry Organization COVID-19 Research

Information was gathered from each industry representative to determine if their organization had conducted any research or surveys related to COVID-19's impact on the U.S. aviation industry or Florida's airport system. All five organizations indicated that they had conducted some level of research or surveys of their organization's members. For example, bi-weekly newsletters were published by FAC which provided snapshots of the pandemic's impacts at each airport. Other surveys included a nationwide survey conducted by ACC, which documented the impacts of the pandemic on airport capital development projects and identified trends in airport construction around the country. AAAE, FABA, and ACI-NA all have dedicated webpages that have COVID-19-related resources and allow industry members to interact with organization staff and other members.

1.6.3. Industry Organization Task Forces

Several task forces and focus groups have been established across the nation and specifically in Florida to determine the impacts of the pandemic, notify airports of potential future impacts, inform legislators of the importance of the aviation industry, and to form partnerships with other agencies and organizations outside the industry. These task forces often include multiple organizations including the five that were

contacted for this analysis. One notable activity conducted by these focus groups is the FAC COVID-19 weekly update calls, which several airports mentioned as being helpful for developing pandemic response plans. Other task forces included an interagency task force that AAAE and ACI-NA joined with the U.S. Department of Transportation, U.S. Department of Homeland Security, and the U.S. Department of Health and Human Services to publish the "Runway to Recovery: The United States Framework for Airlines and Airports to Mitigate the Public Health Risks of Coronavirus" guidance document. The task forces that these industry organizations have partaken in have directly influenced the actions of federal agencies, including the passage of the CARES Act.

1.6.4. Industry Organization Recovery

Organization representative were also asked if their group had created any forecasted recovery scenarios. Two organizations, ACI-NA and ACC noted that they had published recovery scenarios. ACI-NA published an introductory report in June that included industry recommendations and priorities to recover from the economic downturn. ACC, meanwhile, hosted a webinar in April that featured insights about future industry recovery. This presentation included data from Airlines for America (A4A) and Inter*VISTAS*, which developed long range recovery scenarios for the global airline industry. These recovery scenarios are considered and discussed further in **Chapter 3: Airport Forecasts and Recovery.**

1.7. Summary

The COVID-19 pandemic has undoubtedly had a dramatic effect not only airports and airlines, but the entire global economy. Airports and airlines have been one of the hardest hit industries and seemingly slowest to recover as public confidence remains exceedingly low. Airport representatives frequently referred to previous economic downturns such as the terrorist attacks on September 11, 2001, the housing market crash of 2008, and Hurricane Katrina to provide some sort of context; but many agreed that the COVID-19 pandemic has been far worse. Aviation industry groups have been quoted saying the COVID-19 pandemic is five times worse than 9/11.

The aviation industry has always found a way to rebound from catastrophic events and Florida's aviation system is primed to do so. While passenger enplanements and revenues are down compared to previous years, capital improvement projects are experiencing delays, and many airport business are struggling to stay afloat; the aviation industry is working around the clock to mitigate the fallout and establish procedures that are sustainable and create resilience for a similar event in the future

Chapter 2. Air Service Schedule Assessment

2.1. Introduction

The commercial service aviation industry in Florida possesses one of the most comprehensive and robust airport systems in the United States. With approximately half of all Florida visitors arriving by air, there has been a continuous effort to maintain and expand the state's aviation system to accommodate the influx of passengers.[1] This has allowed Florida's airports to enjoy over a decade of commercial service growth, allowing for tourism and business development to flourish.

In March 2020, the COVID-19 pandemic forced global travel restrictions and strict quarantine measures which greatly affected air travel in 2020. The travel bans, as well as a general fear of the pandemic, resulted in reduction of air travel activity that has never been experienced before. Airlines had no choice but to drastically cut system capacity by cancelling scheduled domestic and international flights to offset the decline in passenger traffic and abide with imposed travel restrictions.

This chapter documents an evaluation of the Official Airline Guide (OAG) data to further understand the magnitude of the reduction in Florida's air travel capacity and availability.

2.2. Background

To assess the pandemic's impacts on airline schedules and resulting passenger activity among Florida's airports, airline schedule data was compiled from the OAG. The OAG is a global provider of aviation data for airports, airlines, and other stakeholders to assess the historical, current, and future activity in the aviation industry. In conducting a comprehensive assessment of the commercial service aviation industry during the pandemic, the OAG Schedule Analyzer was utilized to compile airline schedule data from January 2019 through December 2020. These data include records for all scheduled flights that either originate and/or terminate at a Florida commercial service airport and are comprised of several data fields such as:

- Departure and arrival airport
- Operating carrier
- Days of operation
- Departure time
- Flight number
- Monthly frequency
- Seating availability
- Month/year of the flight

It is important to consider that this data does not reflect the exact number of airline flights that operated from Florida airports each month. Airlines make schedule decisions on a daily basis and it is unknown how often the schedules are updated within the OAG database. Additionally, airlines cancel and delay flights due to a variety of factors including weather and crew scheduling, creating further difference between airline schedules and actual departure frequency. Furthermore, it should be noted that the OAG

[1] FDOT. (November 2017). "FASP 2035 Summary Report". Available online at https://www.fdot.gov/aviation/FASP2035. (Accessed September 2020).

data was gathered in September, and it is likely that airline schedules will be altered between October and December. As such, this analysis omitted airline schedules in November and December 2020 and only compared airline schedule changes from January through October in 2019 and 2020.

2.3. Analysis Methodology

The methodology to compare airline schedules at Florida's commercial service airports used Year-over-Year (YoY) comparisons of data between 2019 and 2020 for three metrics:

- **Monthly scheduled interstate departure frequency:** The number of monthly scheduled departures originating from a Florida commercial service airport and terminating at an airport outside the state.
- **Monthly seating availability:** The monthly system-wide seating capacity among all scheduled departures originating from a Florida commercial service airport and terminating at an airport outside the state.
- **Number of destinations served:** The number of monthly interstate destinations offering scheduled service from all the Florida commercial service airports.

As scheduled departure data closely correlated with arrival flight data, the schedules analysis incorporates data for Florida interstate departures only. In many instances, airline schedules are cancelled within hours or days of the scheduled departure

2.4. Schedule Data Findings

The following sections assess the pandemic's impacts to Florida's airline schedules at three distinct levels:

- Statewide Level
- District Level
- Airport Level

2.4.1. Statewide Level

Florida serves as a popular leisure and business destination for both domestic and international travelers. In 2019, the state attracted more than 131 million visitors from all parts of the world.[2] These passengers travel into Florida year-round. A large number of leisure passengers travel during the winter months as "snowbirds" from the northern climates seeking warmer weather and Florida beaches. In addition, the summer months also see a large influx of tourism into Florida with students being out of session and seeking the tourism hotspots within the state. Year-round Florida hosts passenger cruises from both coasts, bringing tourists to initiate their cruise tours. Florida also serves as a top destination for business traffic in the U.S. with popular business centers like Miami, Tampa, and Jacksonville. Industries including agriculture, aerospace/aviation, and life sciences generate the greatest contribution to the state economy.[3]

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[2] Visit Florida. (2020). "Florida Visitor Estimates". Available online at: https://www.visitflorida.org/resources/research/. (Accessed September 2020)
[3] Walton, Justin. (May 2019). "Florida's Economy: The 6 Industries Driving GDP Growth". Available online at: https://www.investopedia.com/articles/investing/011316/floridas-economy-6-industries-driving-gdp-growth.asp. (Accessed September 2020).

The COVID-19 pandemic has placed a significant damper on both leisure and business activity in Florida. Airlines were forced to scale back system capacity starting in April 2020 as a result of the sharp decline in passenger traffic and global travel restrictions. When comparing January through October 2020 to the same period in 2019, the Florida airport system experienced approximately 64 percent of the scheduled airline departure frequency of the prior year (or a 36 percent reduction).

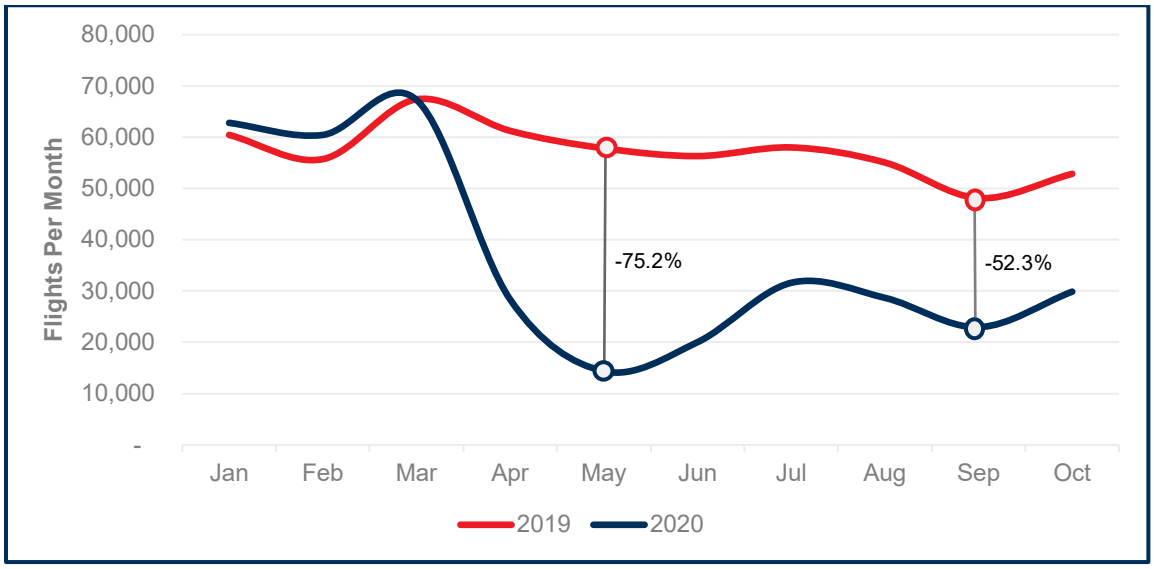
Table 2-1: Statewide Scheduled Airline Departure Frequency Comparison – International and Domestic

Month	2019	2020	% YoY Change
January	60,435	62,788	3.9%
February	55,715	60,434	8.5%
March	67,381	67,273	-0.2%
April	61,232	28,356	-53.7%
May	57,834	14,369	-75.2%
June	56,308	20,027	-64.4%
July	57,997	31,604	-45.5%
August	55,060	28,675	-47.9%
September	48,123	22,960	-52.3%
October	52,850	29,880	-43.5%
Total	**572,935**	**366,366**	**-36.1%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

May 2020 saw the biggest disparity in scheduled flight frequency with a 75 percent decline compared to May of the prior year. Airline traffic rebounded slightly in June and July, indicating the resurgence of traffic during one of the traditional peak travel seasons. However, airline departure frequency declined slightly in August and September as a result of the uptick in new COVID-19 cases during that time. In September 2020, the schedule disparity resulted in a 52 percent lower frequency compared to the prior year. **Figure 2-1** illustrates the scheduled airline departure frequency comparison.

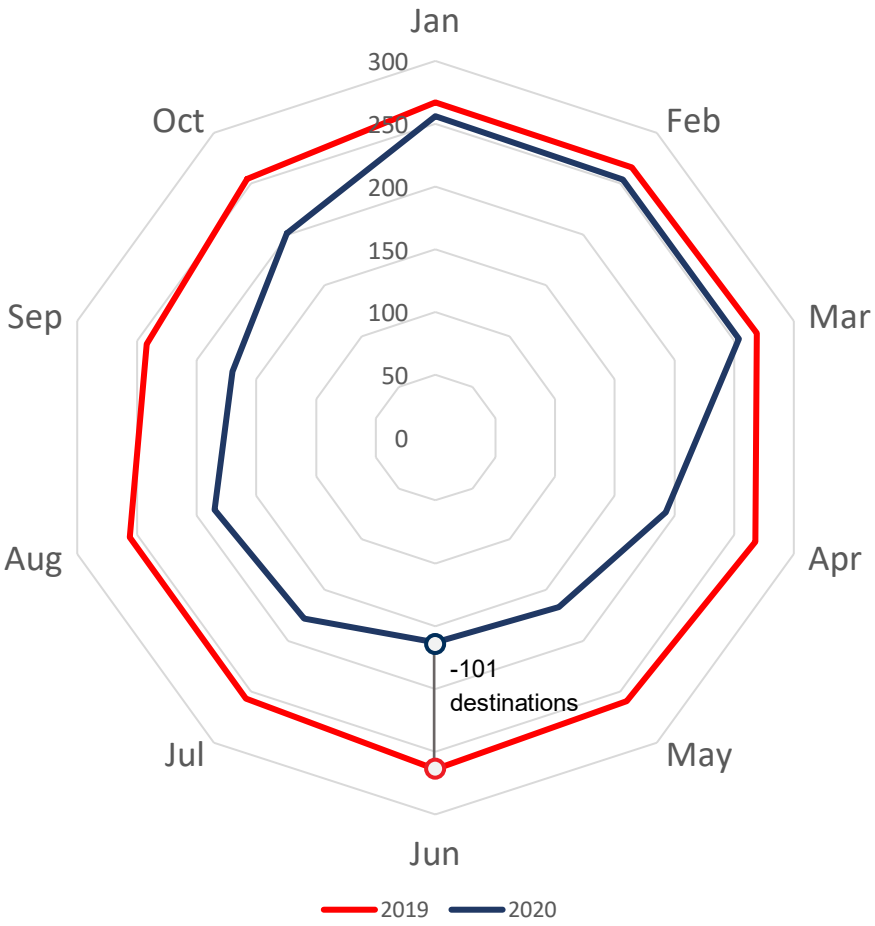
Figure 2-1: Statewide Scheduled Airline Departure Frequency Comparison – International and Domestic



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

The number of interstate (domestic and international) destinations served from Florida commercial service airports experienced a significant decline in 2020. The largest cut in nonstop destinations was seen in June 2020 with 101 fewer destinations being served relative to 2019, as shown in **Figure 2-2**.

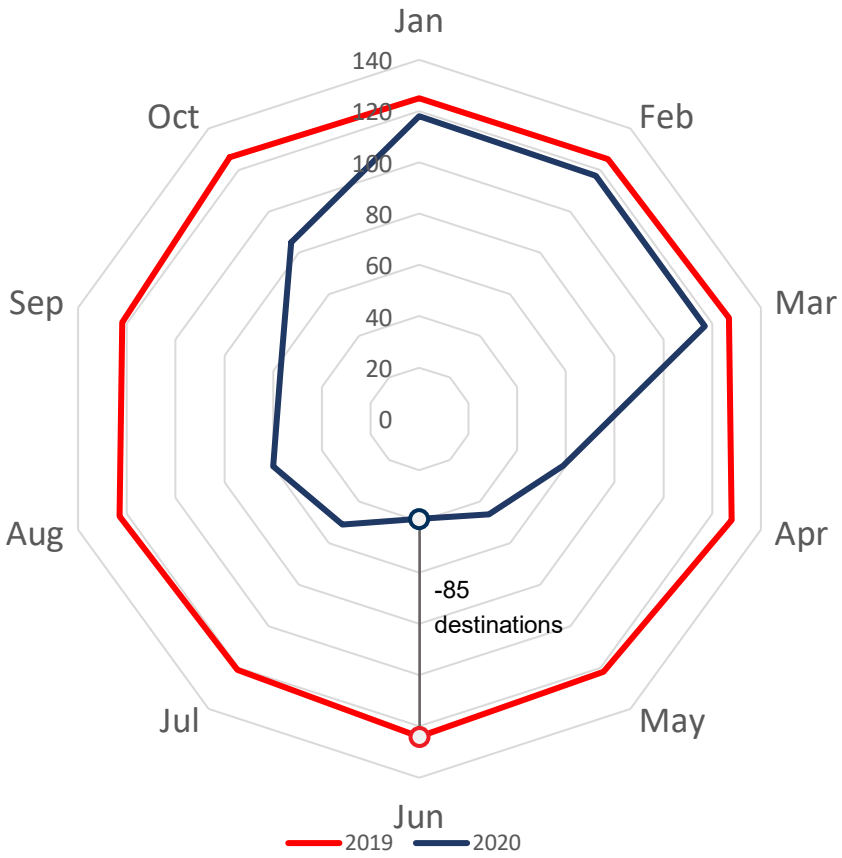
Figure 2-2: Statewide Number of Interstate & International Destinations Served



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

As illustrated in **Figure 2-3,** service to international destinations from Florida commercial service airports was impacted to a far greater extent than domestic destinations. Similar to domestic interstate destinations, airlines cut the greatest number of destinations in June 2020 compared to the same month of the previous year. However, service to 85 international destinations was terminated, representing a 69 percent decrease in available destinations. Airlines added some destinations back to their schedules between August and October, but international service will likely remain depressed until foreign travel restrictions are lifted.

Figure 2-3: Statewide Number of International Destinations Served

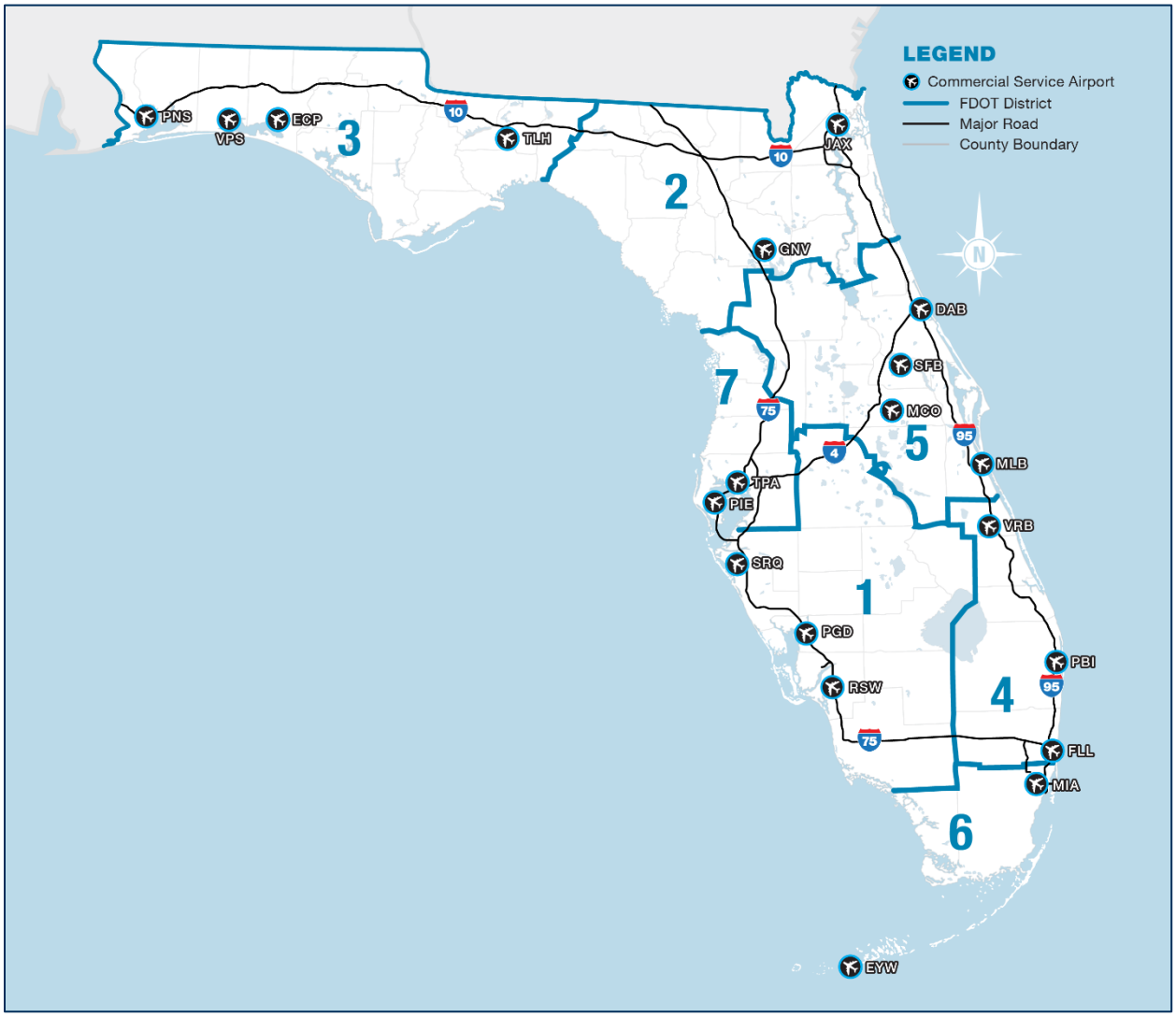


Sources: OAG Schedule Analyzer, Kimley-Horn 2020

2.4.2. District Level

The Florida aviation system is organized by seven districts, each containing multiple counties. The districts oversee major functions such as administration, planning, production, and funding at the airports within each district. Each district has unique economic and demographic characteristics that influence airline service and passenger traffic trends. Additionally, COVID-19 has spread across each of the districts at different rates, disproportionately impacting certain regions. As such, an analysis was conducted for each district to account for any socioeconomic and pandemic-related factors that are unique to each district. **Figure 2-4** illustrates the seven FDOT districts. The following sections provide a summary of the COVID-19 impacts to airline schedules in each district. It should be noted that the following FDOT district analyses include both domestic and international flights and destinations served.

Figure 2-4: FDOT District Map



Source: FDOT, 2020

2.4.2.1. District 1

District 1 represents 12 counties within the southwest region of the state, starting south of the Tampa metropolitan area and extending into the northern part of the Everglades. Along with 2.7 million residents, the region includes popular beach cities and towns such as Fort Myers, Sarasota, and Naples that bring in a large inflow of tourism. There are three commercial service airports located within District 1:

- Southwest Florida International (RSW)
- Punta Gorda (PGD)
- Sarasota Bradenton (SRQ)

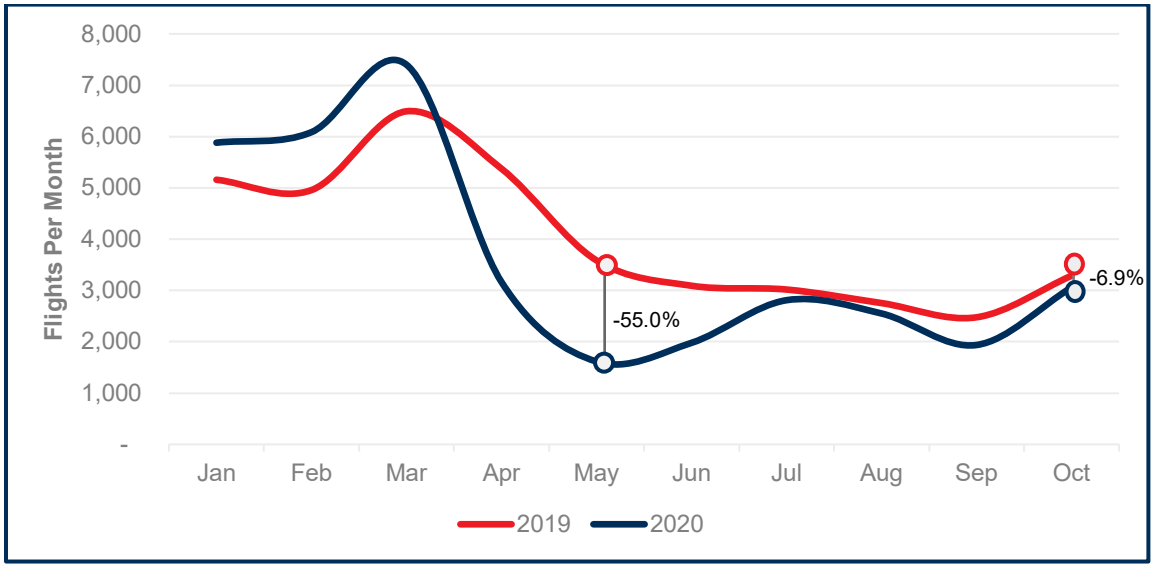
In quarter 1 (Q1) 2020, departure frequency within District 1 airports had increased between 14 and 23 percent YoY compared to Q1 of 2019. This changed quickly in April and May once the pandemic forced airlines to cut a significant portion of capacity. The greatest YoY percentage change was experienced in May 2020 with a significant decrease in departure frequency of 55 percent, amounting to 1,972 total departing flights cut. However, starting in June, airline schedules have increased, likely due to the influx of leisure travelers visiting the region during the summer months. **Table 2-2** shows the data and **Figure 2-5** illustrate the trend in departure frequency among the three airports in District 1.

Table 2-2: District 1 Scheduled Airline Departure Frequency Comparison

Month	2019	2020	% YoY Change
January	5,158	5,880	14.0%
February	4,956	6,085	22.8%
March	6,492	7,400	14.0%
April	5,373	3,165	-41.1%
May	3,586	1,614	-55.0%
June	3,092	1,979	-36.0%
July	3,018	2,810	-6.9%
August	2,754	2,551	-7.4%
September	2,477	1,937	-21.8%
October	3,287	3,060	-6.9%
Total	**40,193**	**36,481**	**-9.2%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

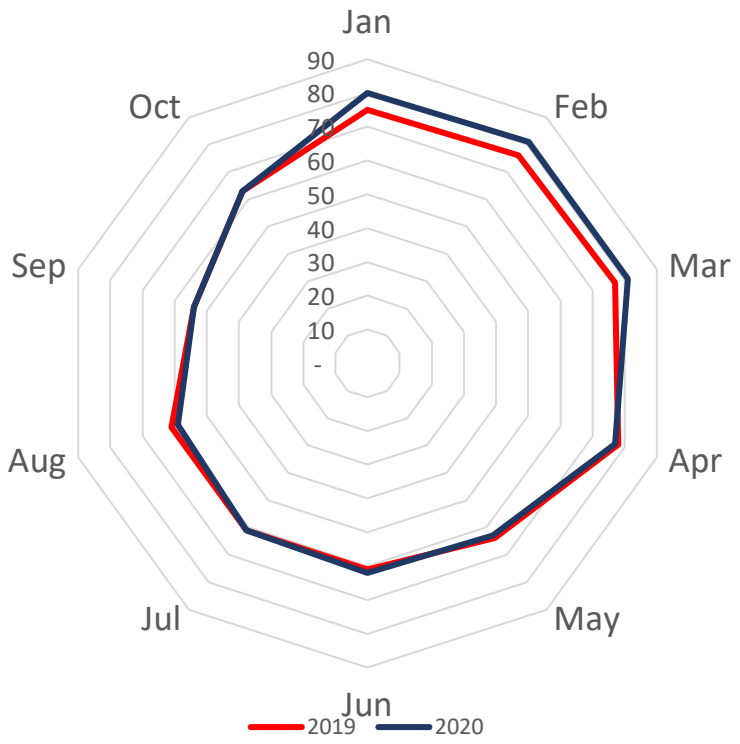
Figure 2-5: District 1 Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

As illustrated in **Figure 2-6**, District 1 airports experienced an increase in interstate destinations served during the first three months of 2019, and witnessed little change in the number of destinations served between April and October 2020 compared to 2019. However, during the same time period, the number of available international destinations decreased by nearly 50 percent, signaling that service to domestic was less affected than international service.

Figure 2-6: District 1 Number of Interstate and International Destinations Served



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

2.4.2.2. District 2

District 2 is situated in Northeast Florida and includes 18 counties in its' jurisdiction. There are an estimated 1.9 million residents in this region with the largest population concentration centered in Jacksonville, located along the Atlantic coast and close to the Georgia border. In addition, Gainesville is the other populous city in the region with University of Florida creating an influx of college students into the area. The two commercial service airports located within District 2 that were included in the following airline schedule analysis are:

- Gainesville Regional Airport (GNV)
- Jacksonville International Airport (JAX)

In Q1 2020, departure frequency within District 2 airports started out lower than the prior year – fluctuating between a YoY percentage change of -3 to -7 percent. This decline worsened into quarter 2 (Q2) with the pandemic forcing airlines to cut a significant portion of capacity. The greatest YoY percentage change happened in May 2020 with departure frequency decreasing nearly 74 percent, amounting to 2,400 total departing flights cut from airline schedules within the district. This decrease was dampened in the summer months with scheduled departures increasing 84 percent from May to August 2020. However, overall scheduled departure frequency is still more than 50 percent lower in the fall months compared to the same time last year. Total departure frequency between January and October

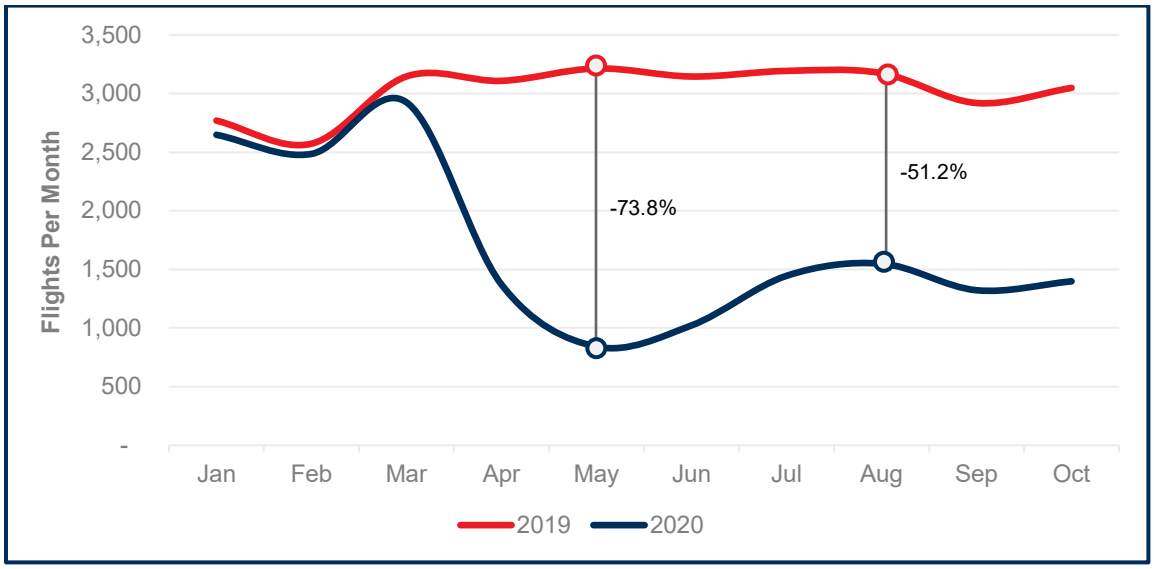
this year is reported to be 44 percent lower than last year's frequency. **Table 2-3** and **Figure 2-7** illustrate the trend in departure frequency among the two airports in District 2.

Table 2-3: District 2 Scheduled Airline Departure Frequency Comparison

Month	2019	2020	% YoY Change
January	2,769	2,648	-4.4%
February	2,572	2,485	-3.4%
March	3,146	2,925	-7.0%
April	3,108	1,371	-55.9%
May	3,214	841	-73.8%
June	3,145	1,022	-67.5%
July	3,193	1,445	-54.7%
August	3,174	1,549	-51.2%
September	2,919	1,322	-54.7%
October	3,048	1,398	-54.1%
Total	30,288	17,006	-43.9%

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Figure 2-7: District 2 Scheduled Airline Departure Frequency Comparison

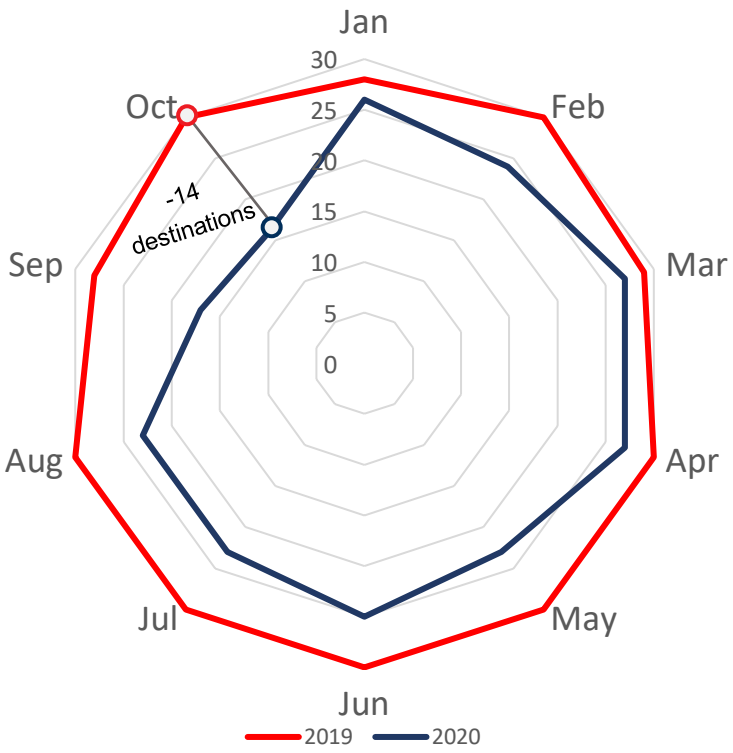


Sources: OAG Schedule Analyzer, Kimley-Horn 2020

The commercial service airports within District 2 both reported having fewer nonstop interstate destinations available throughout all months of 2020 compared to the prior year. This disparity widened further in the fall months and by October, 14 fewer destinations were available compared to 2019, as shown in **Figure 2-8**. International service represents a very small portion of the total destinations

available from District 2 airports, and, as such, there was little change in the number of international destinations served.

Figure 2-8: District 2 Number of Interstate and International Destinations Served



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

2.4.2.3. District 3

District 3 is comprised of 16 counties in the Florida Panhandle with a population of approximately 1.4 million residents. There are several population centers in this district including Pensacola, Panama City, Destin/Fort Walton, and Tallahassee. Each of these cities have their own respective public-use airports to attract many leisure but also some business traffic into the region. The four airports included within the District 3 airline schedule analysis include:

- Destin-Fort. Walton Beach (VPS)
- Northwest Florida Beaches International (ECP)
- Pensacola International (PNS)
- Tallahassee International (TLH)

In Q1 2020, departure frequency within District 3 airports were higher than the prior year – fluctuating between a YoY percentage change of five and 12 percent. This changed quickly in Q2 once the pandemic forced airlines to cut a significant portion of capacity. The greatest YoY percentage change happened in May 2020 with a significant decrease in departure frequency of 58 percent, amounting to

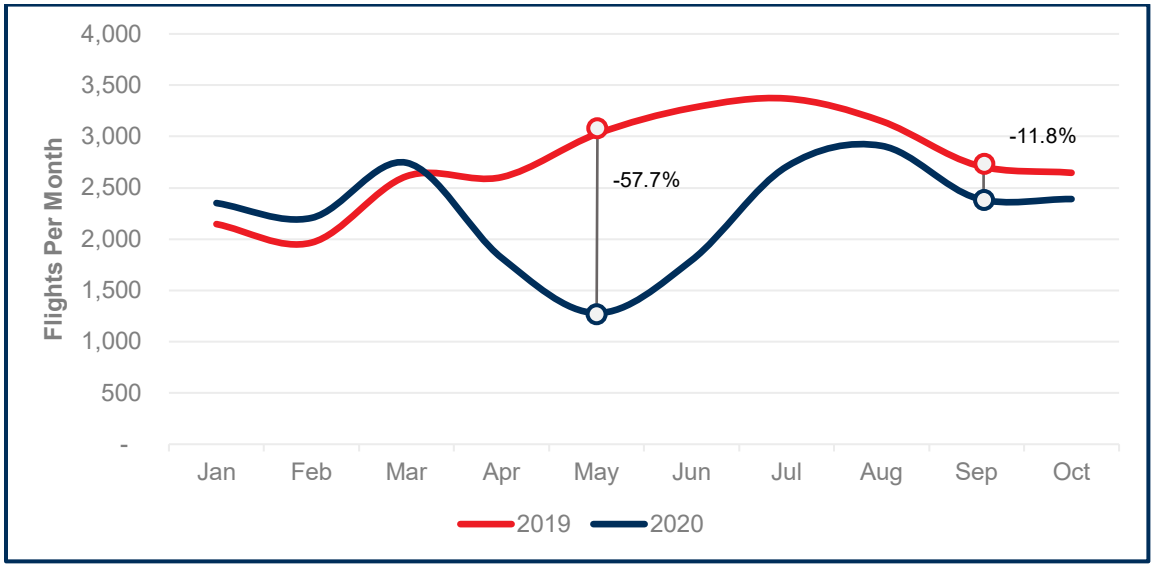
1,745 total departing flights cut from airline schedules within District 3. This has since rebounded in the summer months as a result of the influx of leisure travel into the region. However, the total scheduled departures between January and October this year are still 18 percent lower than the previous year. **Table 2-4** shows the data and **Figure 2-9** illustrate the trend in departure frequency among the four airports in District 3.

Table 2-4: District 3 Scheduled Airline Departure Frequency Comparison

Month	2019	2020	% YoY Change
January	2,146	2,351	9.6%
February	1,965	2,206	12.3%
March	2,612	2,744	5.1%
April	2,603	1,818	-30.2%
May	3,024	1,279	-57.7%
June	3,278	1,792	-45.3%
July	3,370	2,706	-19.7%
August	3,150	2,909	-7.7%
September	2,720	2,399	-11.8%
October	2,646	2,390	-9.7%
Total	**27,514**	**22,594**	**-17.9%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Figure 2-9: District 3 Scheduled Airline Departure Frequency Comparison

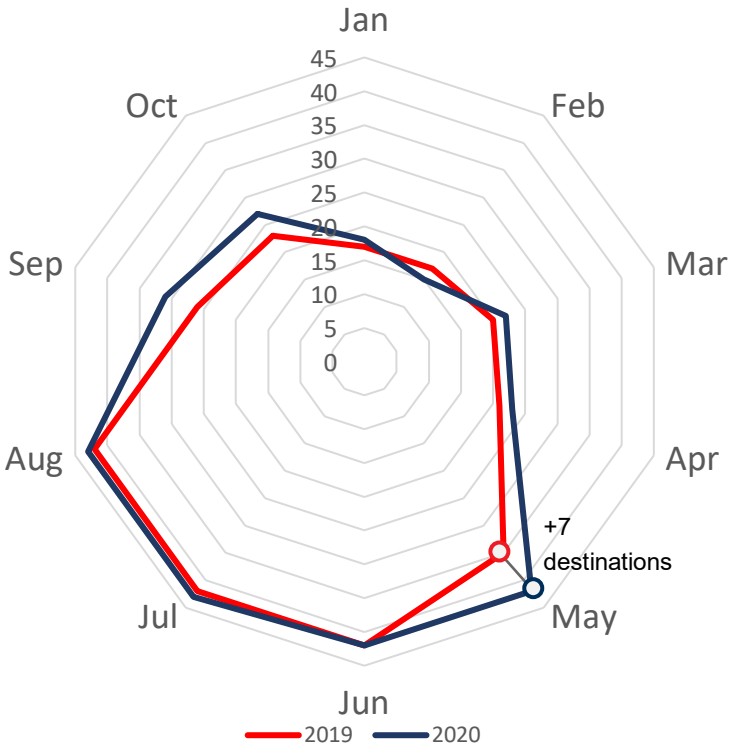


Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Figure 2-10 indicates that airline services levels at District 3 airports vary throughout the year, as airlines offer service to more than twice as many destinations in the summer months than in the winter months.

The total number of destinations offered from District 3 airports was not adversely affected during the pandemic, as the number of destinations grew by 20 percent (7 destinations) in May 2020 compared to the previous year. Airline service remained relatively constant throughout the rest of the year compared to 2019. Similar to District 2, there is very limited international service from District 3 airports, and as a result, there was no change in the number of international destinations available from District 3 airports.

Figure 2-10: District 3 Number of Interstate and International Destinations Served



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

2.4.2.4. District 4

The Fort Lauderdale district includes five counties in Southeast Florida, just north of the Miami area. Despite the relatively smaller footprint of this district, there are two large population centers in this region that make up the majority of the 3.6 million residents: Fort Lauderdale and West Palm Beach. Both these areas bring in a significant volume of leisure passengers for the beaches and boating canals, with Fort Lauderdale also being a large cruise home port. There are three airports in this region that were included in the flight schedule analysis:

- Fort Lauderdale/Hollywood International (FLL)
- West Palm Beach International (PBI)
- Vero Beach (VRB)

Most of the scheduled departure frequency in District 4 is originating from FLL, which is one of the large international airports in the state. Due to the large international traffic flow that FLL realizes, there was a

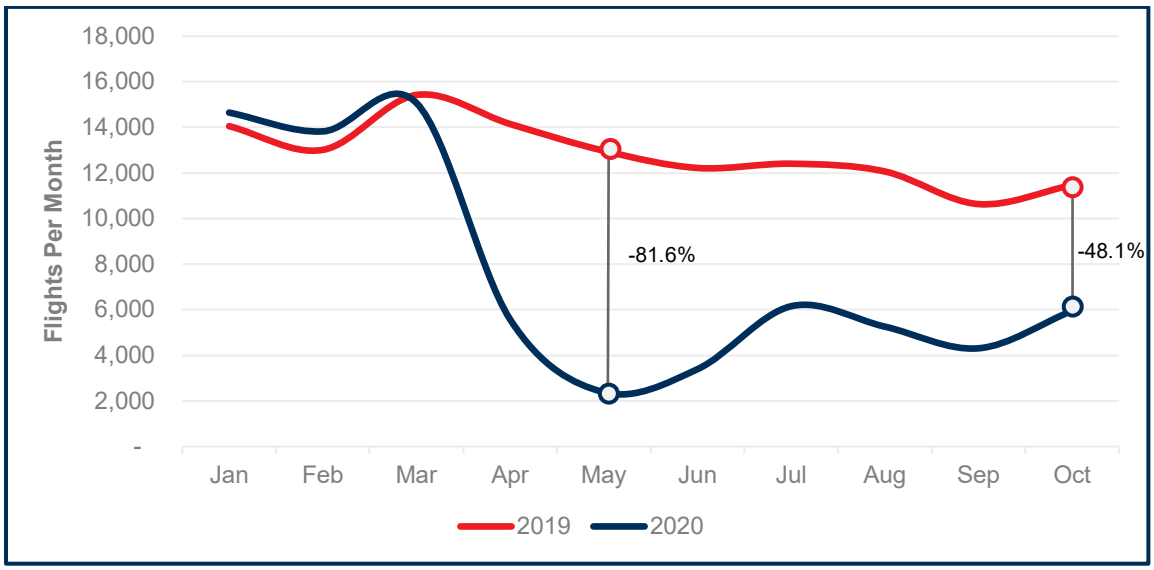
significant drop in scheduled flights compared to other non-international airport districts starting in April. By May 2020, there was a nearly 82 percent decrease in total scheduled departures with some rebound attained in the summer months and through October. However, the total schedule departure frequency in the district between January and October this year is 40 percent lower than the prior year. **Table 2-5** shows the data and **Figure 2-11** illustrates the changes to schedules throughout the three airports in District 4.

Table 2-5: District 4 Scheduled Airline Departure Frequency Comparison

Month	2019	2020	% YoY Change
January	14,055	14,650	4.2%
February	13,015	13,825	6.2%
March	15,425	15,071	-2.3%
April	14,149	5,575	-60.6%
May	12,976	2,383	-81.6%
June	12,221	3,395	-72.2%
July	12,408	6,156	-50.4%
August	12,068	5,260	-56.4%
September	10,636	4,310	-59.5%
October	11,472	5,958	-48.1%
Total	**128,425**	**76,583**	**-40.4%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

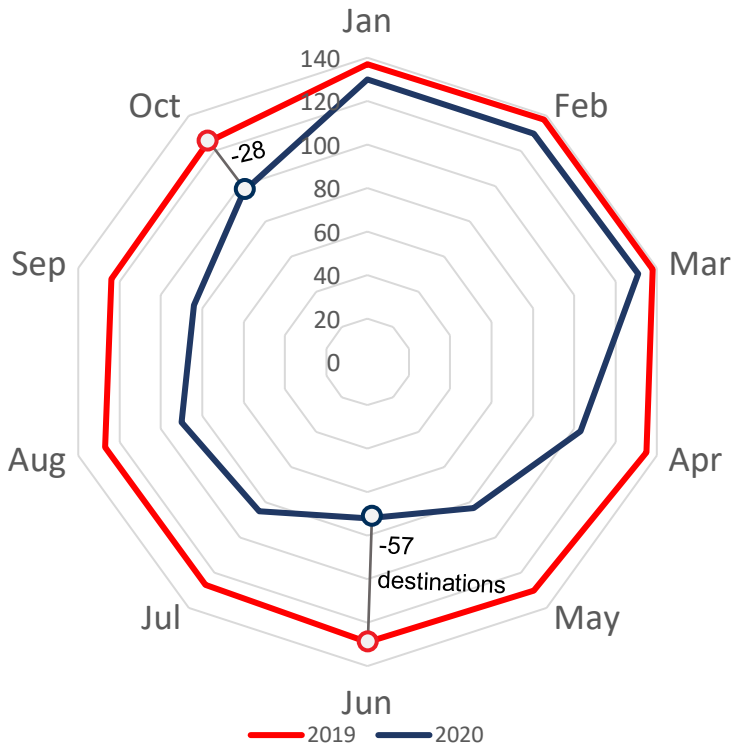
Figure 2-11: District 4 Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Traditionally, airlines at the three District 4 airports offer service to a consistent number of destinations throughout the year. However, due to the pandemic, airlines reduced the number of nonstop destinations offered from District 4 airports by more than 40 percent (57 destinations) in June 2020 compared to the previous year. Additionally, airlines terminated service to international destinations by more than 50 percent between March and October. Airline service increased in fall 2020, as airline service was provided to 78 percent of the destinations available the year prior. **Figure 2-12** presents the number of airline destinations available at District 4 airports.

Figure 2-12: District 4 Number of Interstate and International Destinations Served



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

2.4.2.5. District 5

District 5 is identified as the Central Florida region for comprising of nine counties in the middle of the state, including a few on the Atlantic coast. There are several population centers that are included in the region such as Orlando, Daytona Beach, Titusville, and Melbourne. Along with the 4.1 million residents in the district, the region is popular for bringing in a large influx of leisure traffic. The Orlando area is known for its' several amusement parks like Walt Disney World, Universal Orlando, and SeaWorld Orlando. In addition, Melbourne and Daytona Beach bring in a good share of tourism with the extensive beaches and the NASCAR Daytona 500 taking place every February. District 5 is also home to multiple prestigious universities including Embry-Riddle Aeronautical University and the Florida Institute of Technology that attract students and business travelers to the region. To account for this large population, there were four airports in this district that were included in the schedule analysis:

- Orlando International (MCO)
- Orlando Sanford International (SFB)
- Daytona Beach International (DAB)
- Melbourne International (MLB)

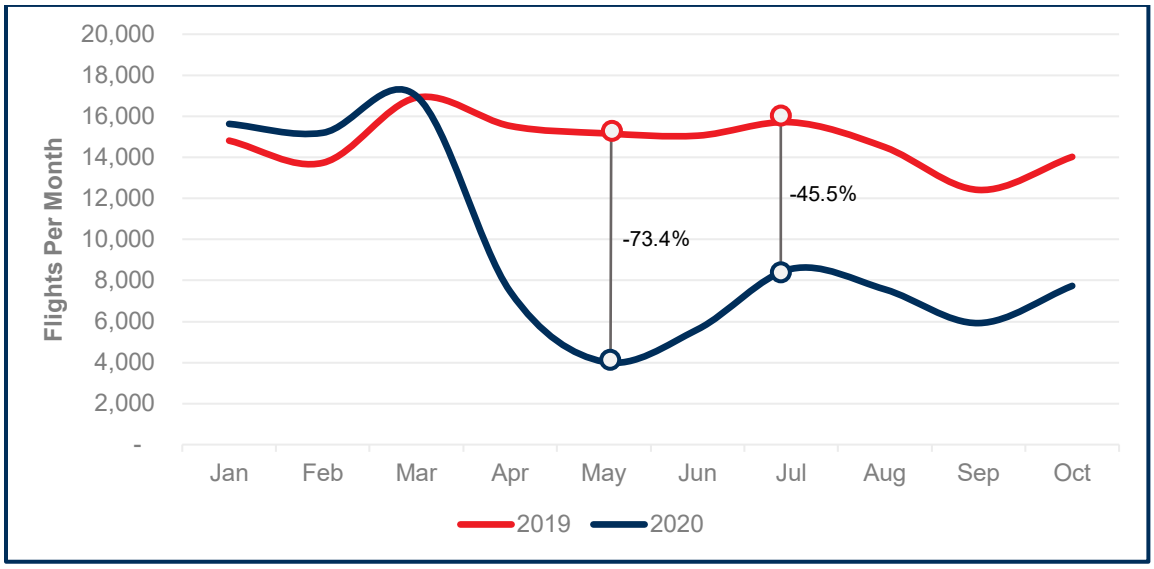
Most of all scheduled passenger traffic in this district is concentrated within the Orlando airports (MCO and SFB). With MCO being a large hub for both domestic and international traffic, the impacts of COVID to the schedule volumes were significant. The district airports realized the first major decline of scheduled departures in April 2020 with a 56 percent decrease compared to the prior month. May saw the greatest YoY percentage decline in scheduled departures at 73 percent, amounting to a reduction of 11,139 flights compared to 2019. The summer months saw some rebound from this as a result in some resurgence in leisure traffic in the region. Despite this, the overall YoY decrease in scheduled traffic between January and October this year will round out to be an estimated 36 percent lower compared to 2019. **Table 2-6** shows the data and **Figure 2-13** illustrates the trend of scheduled departure volumes during 2019 and 2020.

Table 2-6: District 5 Scheduled Airline Departure Frequency Comparison

Month	2019	2020	% YoY Change
January	14,815	15,631	5.5%
February	13,733	15,196	10.7%
March	16,912	16,983	0.4%
April	15,531	7,459	-52.0%
May	15,173	4,034	-73.4%
June	15,056	5,611	-62.7%
July	15,711	8,562	-45.5%
August	14,497	7,566	-47.8%
September	12,412	5,921	-52.3%
October	14,025	7,735	-44.8%
Total	**147,865**	**94,698**	**-36.0%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

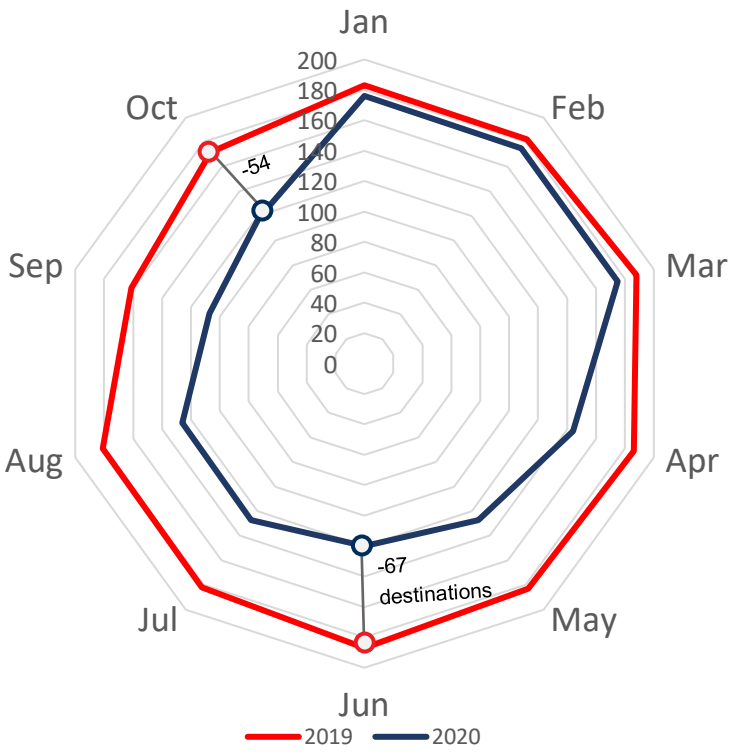
Figure 2-13: District 5 Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Given the popularity of leisure and business travel in the Orlando region, District 5 airports offer service to nearly than 140 domestic destinations and 70 international destinations around the globe. The number of destinations offered by airlines at District 5 airports were relatively stable in the first three months of 2019 and 2020, however, the number of available destinations declined by more than 35 percent (67 destinations) between April and October 2020. **Figure 2-14** presents the number of available destinations served at District 5 airports.

Figure 2-14: District 5 Number of Interstate and International Destinations Served



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

2.4.2.6. District 6

District 6 encompasses the two most southern counties in Florida and consists of an estimated population of nearly 2.6 million residents. With the Miami metropolitan area residing in this district, there is a significant influx of both leisure and business traffic into the region. Much of this traffic flows through Miami International (MIA) which is one of the busiest international airports in the United States. With the airport at the southern tip of the state, it serves as a significant Latin American hub for American Airlines. Key West International also brings in an influx of leisure traffic into the district. Below are the ICAO airport codes associated with the two airports in District 6:

- Miami International (MIA)
- Key West International (EYW)

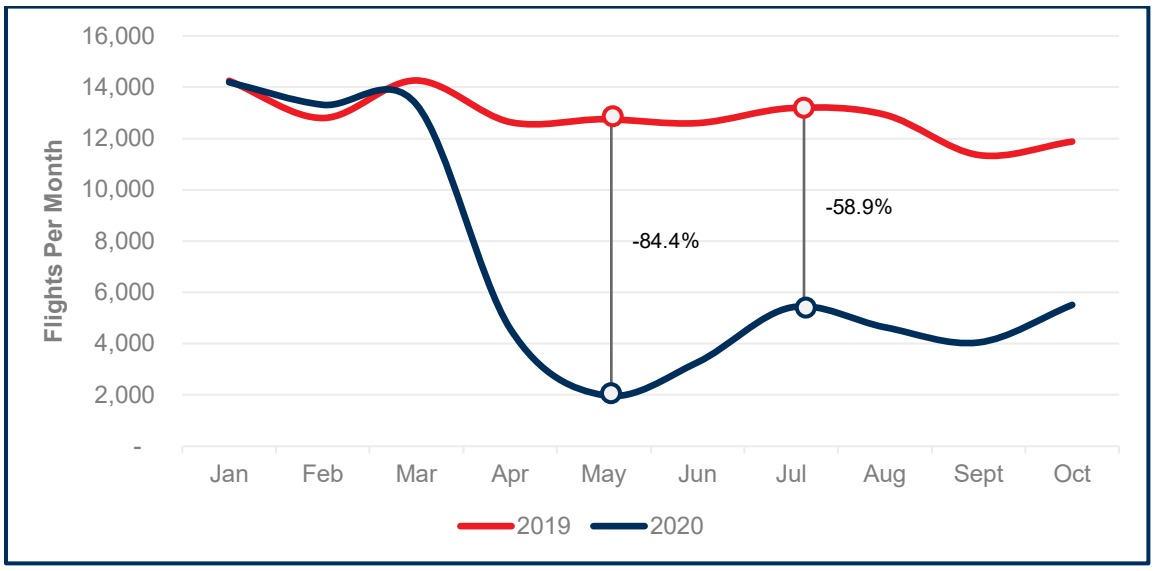
There are a few major trends that were recognized in the evaluation of the schedule data. With the significant international traffic that MIA realizes every year, the district had the largest YoY percentage decline of scheduled departures of any district at 84 percent in May 2020. This amounted to 10,765 departing flights being cut from airline schedules in May 2020 relative to 2019. Since that point, there has been a modest recovery in departures in the summer months as a result of a resurgence in leisure traffic. However, the total departure frequency volume between January and October this year is still 45 percent lower than during the same timeframe in 2019. **Table 2-7** displays the data and **Figure 2-15** illustrates the trend in the scheduled departure frequency in 2019 compared to 2020.

Table 2-7: District 6 Scheduled Airline Departure Frequency Comparison

Month	2019	2020	% YoY Change
January	14,252	14,193	-0.4%
February	12,798	13,314	4.0%
March	14,263	13,325	-6.6%
April	12,639	4,585	-63.7%
May	12,752	1,987	-84.4%
June	12,600	3,271	-74.0%
July	13,185	5,413	-58.9%
August	12,928	4,639	-64.1%
September	11,356	4,046	-64.4%
October	11,881	5,512	-53.6%
Total	**128,654**	**70,285**	**-45.4%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

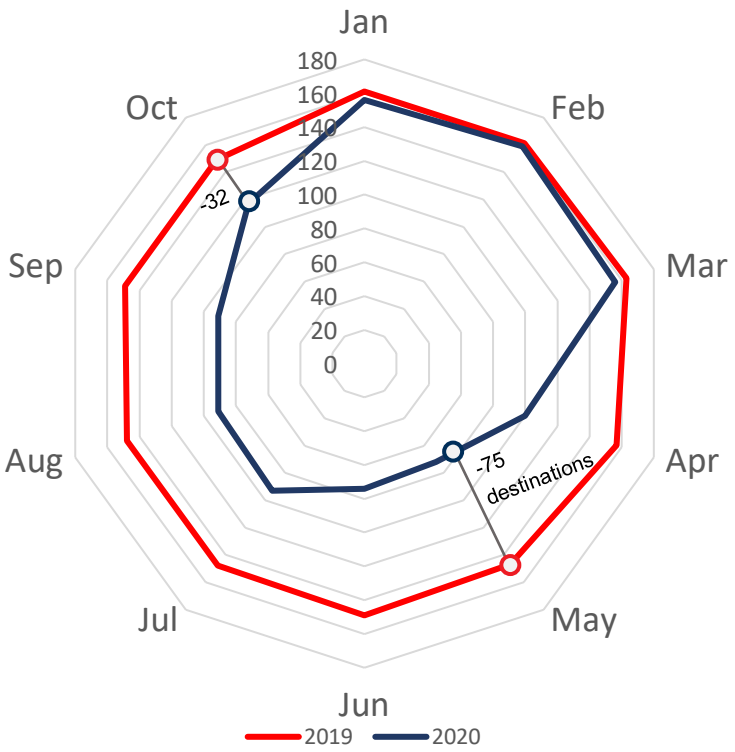
Figure 2-15: District 6 Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Similar to District 4, the two airports in District 6 traditionally provide service to a consistent number of destinations during all months of the year. During the first three months of 2020, airlines maintained nearly the same number of destinations as the same period in 2019. However, airlines suspended service to approximately 75 destinations (50 percent) in April, May, and June. Nearly all destinations that lost service were international destinations, likely due to schedule changes from MIA. Available destinations increased between June and October 2020, as presented in **Figure 2-16.**

Figure 2-16: District 6 Number of Interstate and International Destinations Served



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

2.4.2.7. District 7

District 7 includes five counties situated in the West Central part of Florida along the Gulf Coast. The biggest population center in this region is Tampa with the international airport accounting for the most airline activity among the district airports. Tampa serves as both a popular leisure and business destination with multiple professional sports teams, numerous beaches, and multiple Fortune 1000 companies calling the area home. Along with Tampa, St. Petersburg and Clearwater are popular beach destinations that also contribute to tourism into the district. There are two airports in the greater Tampa area that were included in the schedule analysis:

- Tampa International (TPA)
- St. Pete-Clearwater International (PIE)

Both airports service the greater Tampa region with leisure and business travelers. However, Tampa International contributes far more traffic to the district with an extensive range of domestic and international destinations served. With the pandemic impacting international traffic the most, the district had a significant decline in scheduled departures starting in Q2. May 2020 saw the biggest YoY decline in scheduled departures with 69 percent of flights being cut relative to May of the prior year. This amounted to 4,878 scheduled departures being cut. However, the district airports have since seen a rebound in the summer months with leisure traffic slowly returning. Despite this, the total departure frequency volume between January and October this year is still 30 percent lower than during the same timeframe in 2019.

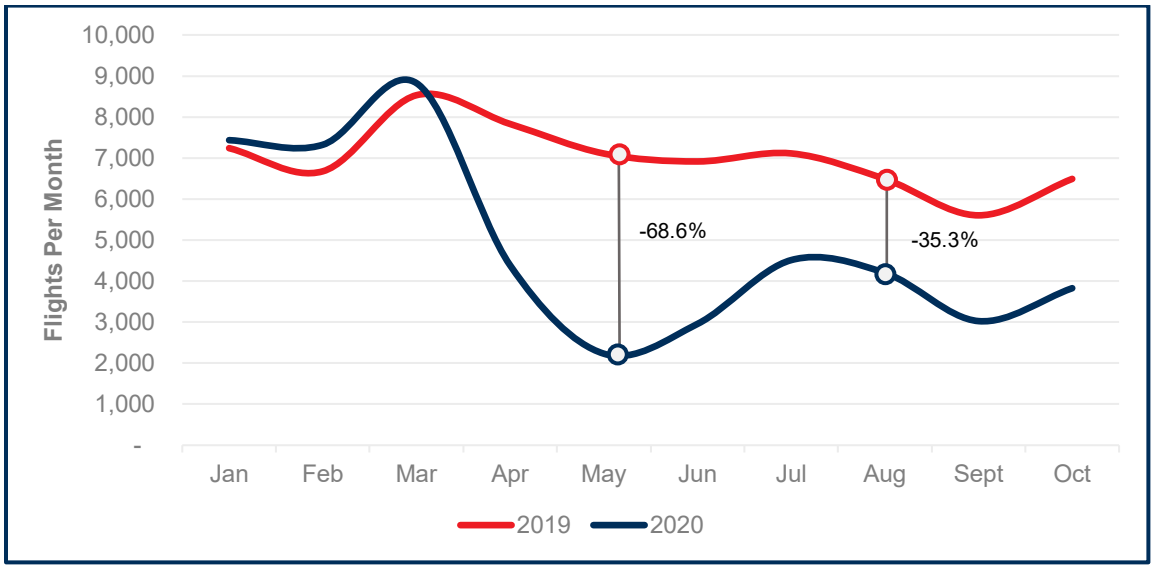
Table 2-8 displays the data and **Figure 2-17** visualizes the trend in schedule departure frequency between 2019 and 2020.

Table 2-8: District 7 Scheduled Airline Departure Frequency Comparison

Month	2019	2020	% YoY Change
January	7,240	7,435	2.7%
February	6,676	7,323	9.7%
March	8,531	8,825	3.4%
April	7,829	4,383	-44.0%
May	7,109	2,231	-68.6%
June	6,916	2,957	-57.2%
July	7,112	4,512	-36.6%
August	6,489	4,201	-35.3%
September	5,603	3,025	-46.0%
October	6,491	3,827	-41.0%
Total	**69,996**	**48,719**	**-30.4%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

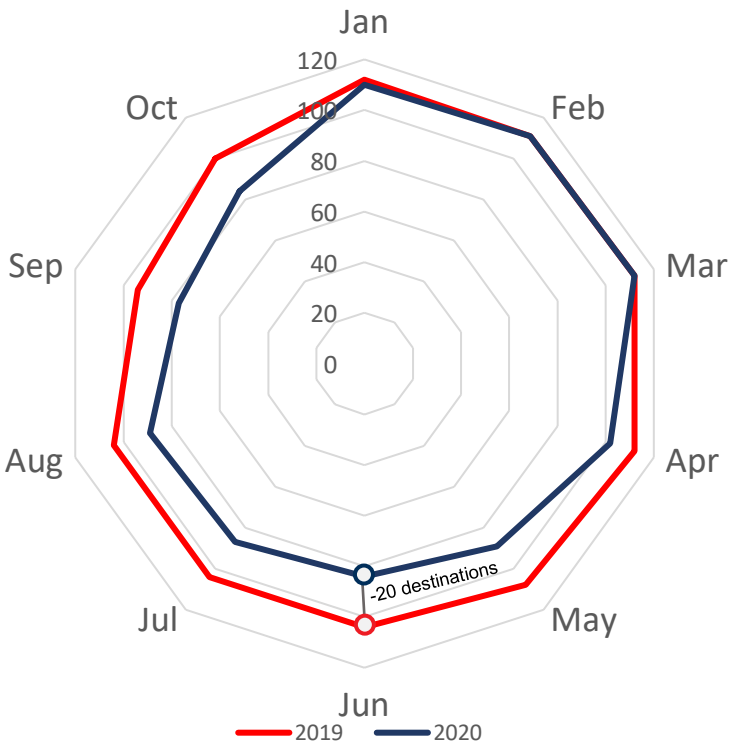
Figure 2-17: District 7 Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Airlines at District 7 airports maintain service to a relatively stable number of destinations throughout the year as business and leisure travelers come to the region. As illustrated in **Figure 2-18**, the pandemic has not significantly affected the number of available destinations offered at District 7 airports since the start of the pandemic, as the number of available destinations has remained within 20 percent of the previous year. However, service to international destinations decreased significantly, as international destination accounted for approximately half the service lost in May and June.

Figure 2-18: District 7 Number of Interstate and International Destinations Served



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

2.4.3. Airport Snapshots

The following sections provide detailed airline schedule comparisons at each Florida commercial service airport. Each airport comparison evaluated the number of destinations served and departure schedule frequency by month in 2020 compared to the same period in 2019. Seating capacity was also analyzed; however, it closely mirrored the trends identified among schedule frequency changes, and as such, was not documented in the following sections. Airport-specific data related to seating capacity is, however, is summarized along with departure schedule frequency and destinations served in individual airport data tables in **Appendix A.** An additional assessment was conducted for the four large-hub airports in Florida as they receive a significant share of international traffic (MCO, MIA, FLL, TPA). The analysis reviewed the trends in nonstop scheduled international flights departing from these four airports. Some non-large hub airports experience international flights, however, the share of international flights at these airports is not robust enough to warrant a separate analysis.

The following sections include an air service review of each Florida commercial service airport, organized by FDOT district.

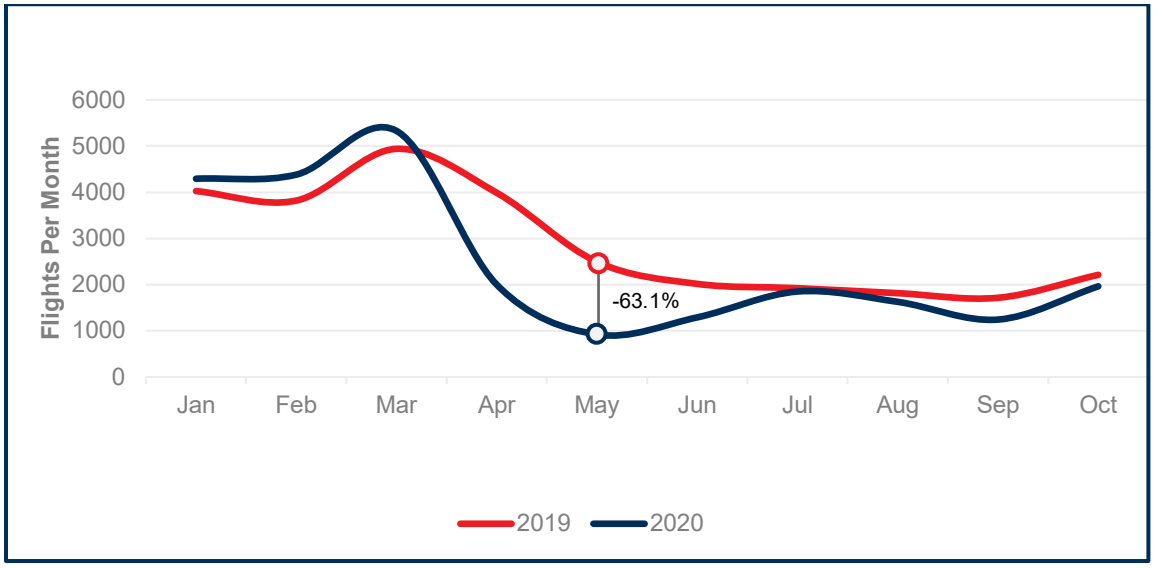
2.4.3.1. District 1

The following section provides individualized airline schedule comparisons for District 1 airports, which include Southwest Florida International (RSW), Punta Gorda (PGD), and Sarasota/Bradenton (SRQ).

Southwest Florida International (RSW)

RSW is a medium hub airport that sits a few miles south of Fort Myers and serves a population of over 750,000 residents. RSW attracts a large number of leisure travelers to the immediate area and is one of the top 50 airports in the United States for passenger traffic because of its influx of beach tourism.[4] In 2019 and 2020, RSW saw a travel peak in March, coinciding with student spring breaks. However, in the following months of 2020, RSW experienced a significant drop in scheduled airline departures. As shown in **Figure 2-19,** total schedule departure frequency was dramatically reduced in May 2020, at over 63 percent lower than May in the prior year. The frequency of departures and number of available seats from RSW grew in June and July, nearly reaching 2019 traffic levels. Total departure frequency between January and October 2020 is 14 percent lower than the same period of the prior year.

Figure 2-19: RSW Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Airlines at RSW provide service to several major hubs around the country. Changes to scheduled departure frequencies vary between destinations, as departures to airports including Atlanta Hartsfield-Jackson International (ATL) experienced a decrease of 26 percent, while Chicago Midway International (MDW) experienced a 32 percent increase in frequency relative to 2019. However, the number of total destinations served by airlines at RSW declined during the crisis by nearly six percent between January and October. **Table 2-9** summarizes changes to departure frequency among the top destinations served by airlines at RSW.

[4] Lee County Port Authority. (N.d). “Airport Information”. Available online at: https://www.flylcpa.com/swfiainfo/. (Accessed September 2020).

Table 2-9: RSW Top Interstate Destinations

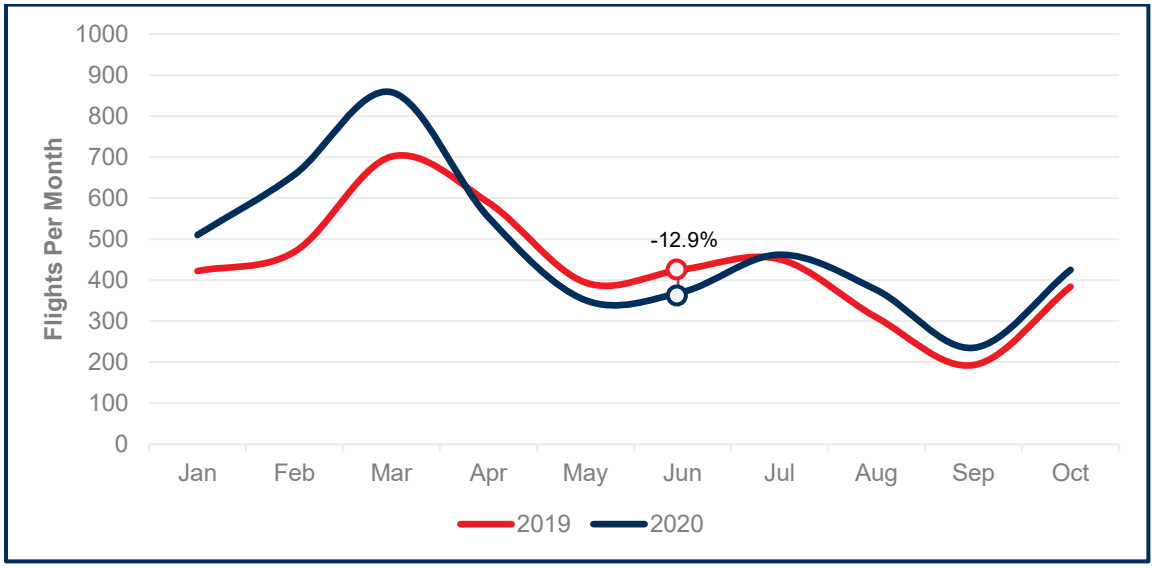
Airport Name	FAA ID	2019 Frequency	2020 Frequency	% YoY Change
Atlanta Hartsfield-Jackson International	ATL	3,060	2,270	-26%
Chicago O'Hare International	ORD	2,058	1,797	-13%
Newark Liberty International	EWR	1,698	1,378	-18%
Baltimore/Washington International	BWI	1,339	1,544	15%
Chicago Midway International	MDW	1,030	1,361	32%

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Punta Gorda (PGD)

PGD is a small hub airport located between Sarasota and Fort Myers which primarily serves as a leisure-heavy focus city for Allegiant Airlines, providing service to more than 45 non-stop destinations. Allegiant has expanded operations at PGD in recent years, and as such, PGD has realized tremendous growth in airline traffic during that time. Prior to the pandemic, there was significant growth in the number of destinations served and the amount of flights scheduled from the airport. This growth carried through 2020 as PGD experienced a relatively small decrease in scheduled departures during the first wave of the pandemic. As shown in **Figure 2-20**, the largest drop in frequency compared to 2019 occurred in June 2020, as scheduled departures decreased nearly 13 percent from June 2019. By July, PGD experienced a two percent increase in scheduled departure frequency compared to 2019, possibly due to a resurgence in leisure traffic. This upturn in airline traffic has continued through October and resulted in total departure frequency through 2020 rounding out to be 10 percent higher than 2019.

Figure 2-20: PGD Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Most of PGD's top destinations experienced a significant increase in frequency in 2020 relative to the prior year. This is depicted in **Table 2-10**, as departures to Fort Wayne, Indiana (Fort Wayne International [FWA]), Flint, Michigan (Bishop International [FNT]), and Grand Rapids, Michigan (Gerald R. Ford International [GRR]) have all increased. Additionally, the number of destinations offered by airlines at PGD increased by nearly 12 percent between January and October 2020 compared to the prior year, signifying substantial growth at the airport despite the pandemic.

Table 2-10: PGD Top Interstate Destinations

Airport Name	FAA ID	2019 Frequency	2020 Frequency	% YoY Change
Cincinnati/Northern Kentucky International	CVG	314	309	-2%
Indianapolis International	IND	232	198	-15%
Fort Wayne International	FWA	144	186	29%
Bishop International	FNT	143	187	31%
Gerald R. Ford International	GRR	114	179	57%

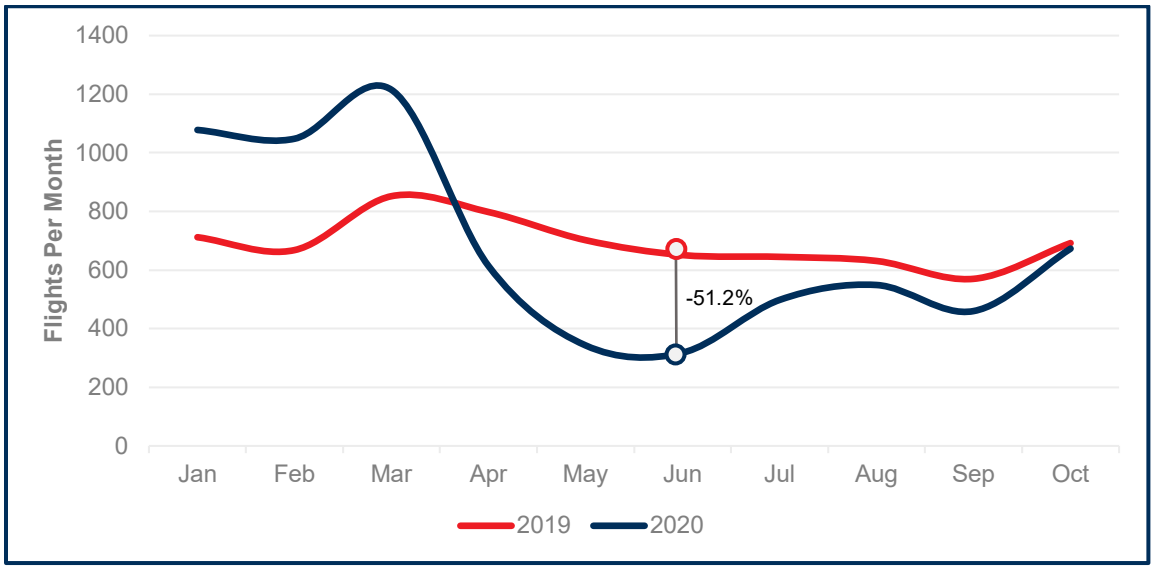
Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Sarasota/Bradenton (SRQ)

SRQ is a small hub airport located near top leisure beach destinations on the southwest Florida coast. Given this, the highest activity is seen in the winter months as tourists visit the warm climate. This was the case through the first three months of 2020 as the airport experienced higher recorded operations than the previous year. Similar to other airports, the pandemic impacted SRQ starting in April 2020. The lowest

schedule frequency occurred in May and June as traffic levels were 51 percent lower than the prior year. Frequency has since improved, and October 2020 is reported to have only a 3 percent lower frequency than the prior year. **Figure 2-21** presents a comparison of the scheduled airline departure frequency at SRQ between 2019 and 2020.

Figure 2-21: SRQ Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Atlanta Hartsfield-Jackson International (ATL) experienced a 35 percent decrease in frequency between January and October. Due to the travel restrictions being implemented between the New York area and Florida, flights to Newark Liberty International fell by 24 percent. However, a few destinations saw an increase in schedule frequency as summarized in **Table 2-11**. Additionally, the number of destinations served by airlines at SRQ increased by nearly 38 percent, which indicates that the air service at the airport recovered well.

Table 2-11: SRQ Top Interstate Destinations

Airport Name	FAA ID	2019 Frequency	2020 Frequency	% YoY Change
Atlanta Hartsfield-Jackson International	ATL	1,986	1,294	-35%
Charlotte Douglas International	CLT	1,192	1,092	-8%
Chicago O'Hare International	ORD	569	577	1%
Newark Liberty International	EWR	526	400	-24%
Dallas/Fort Worth International	DFW	131	277	111%

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

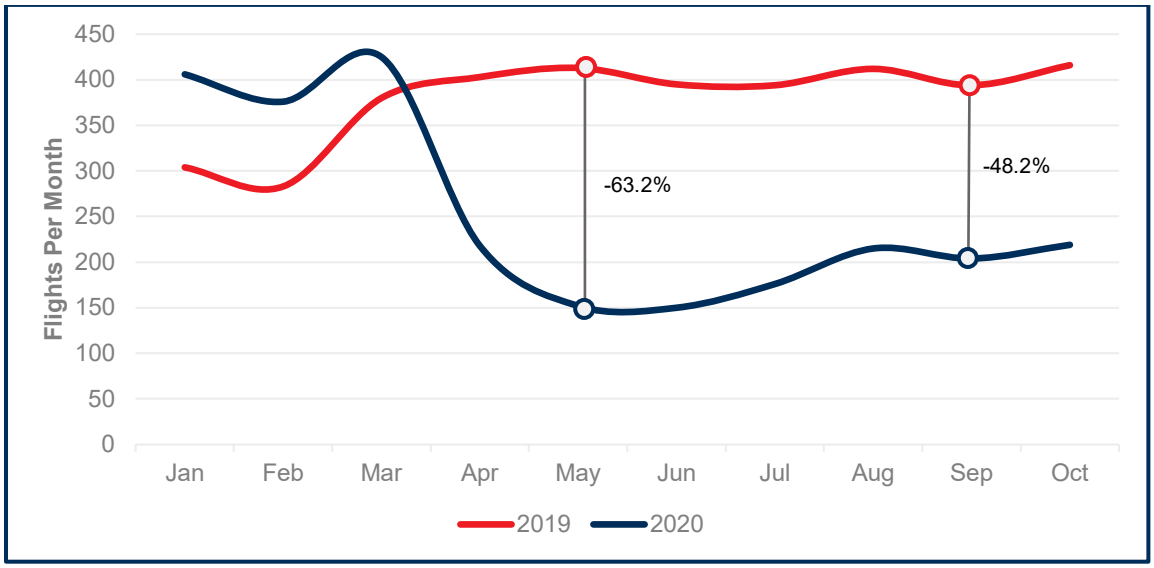
2.4.3.2. District 2

The following section provides an analysis of the scheduled airline departure frequency and top interstate destinations from the two airports in District 2, which include Gainesville Regional (GNV) and Jacksonville International (JAX).

Gainesville Regional (GNV)

GNV is a nonhub airport situated in the north-central region of Florida and is the primary commercial airport for the Gainesville area. Gainesville is home to the University of Florida which serves more than 11,000 out-of-state students.[5] As such, there is typically increased airline activity in August and May with students starting and ending the school term. However, as there is little tourism activity in the area to bolster leisure airline traffic, GNV has seen a significant decline in schedule frequency due to the pandemic. This started in Q2 2020 as the airport recorded a 63 percent drop in frequency relative to May 2019. This negative frequency has continued through the remainder 2020 with a slight improvement in the fall months. **Figure 2-22** illustrates the frequency of airline departures at GNV between 2019 and 2020.

Figure 2-22: GNV Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

GNV primarily offers service to three large airline hubs in the United States. Given that airlines at GNV provide service to only a handful of destinations, there was very little change in the number of destinations available from the airport. Additionally, because of the lack of leisure traffic in Gainesville, a lower frequency of departures to all destinations was recorded compared to 2019. **Table 2-12** summarizes the destinations served by airlines at GNV and the departure frequencies to these airports.

[5] University of Florida. (N.d.). "Fast Facts for Journalists". Available online at https://news.ufl.edu/media/newsufledu/documents/UF-Fact-Sheet-For-Journalists.pdf. (Accessed September 2020)

Table 2-12: GNV Top Interstate Destinations

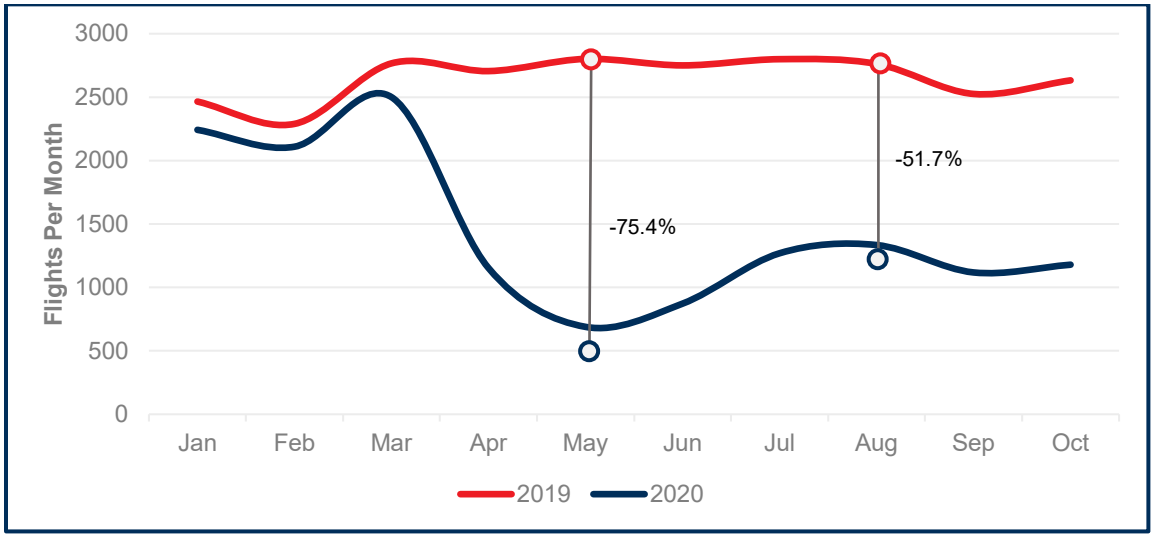
Airport Name	FAA ID	2019 Frequency	2020 Frequency	% YoY Change
Atlanta Hartsfield-Jackson International	ATL	2,149	1,289	-40%
Charlotte Douglas International	CLT	1,191	855	-28%
Dallas/Fort Worth International	DFW	451	395	-12%

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Jacksonville International (JAX)

JAX is a medium hub airport that serves as both a popular leisure and business center for Florida, allowing the airport to flourish with diverse airline activity. As such, the number of destinations, frequency of departures, and number of available seats remains consistent at JAX throughout the year. Airline departure frequency declined sharply in Q2 2020 as May's traffic was 75 percent lower than the prior year. Schedules started increasing in the summer months, but the frequency through 2020 is still 45 percent lower than the prior year. In addition, the number of nonstop interstate destinations from JAX has also been cut by nearly half from 29 in October of 2019 to 16 in October 2020. **Figure 2-23** summarizes the frequency of airline departures between 2019 and 2020.

Figure 2-23: JAX Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

JAX was served by seven airlines that offered service to more than 35 destinations before the pandemic. The top five destinations offered from JAX are all large airline hubs that saw declines in schedule frequency in 2020 relative to 2019, as shown in **Table 2-13**. Additionally, the number of available destinations from JAX declined 11 percent in 2020 compared to 2019.

Table 2-13: JAX Top Interstate Destinations

Airport Name	FAA ID	2019 Frequency	2020 Frequency	% YoY Change
Atlanta Hartsfield-Jackson International	ATL	4,426	2,719	-39%
Charlotte Douglas International	CLT	2,361	1,713	-27%
Chicago O'Hare International	ORD	1,911	919	-52%
Dallas/Fort Worth International	DFW	1,492	1,122	-25%
Baltimore/Washington International	BWI	1,306	1,090	-17%

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

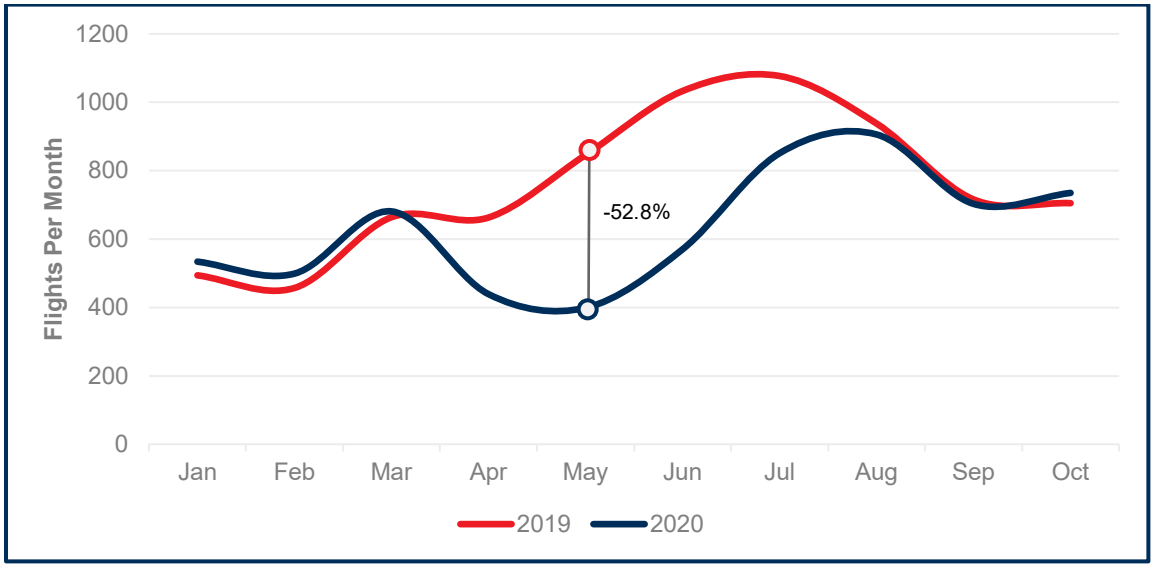
2.4.3.3. District 3

This section discusses the top airline destinations and scheduled airline frequency for each of the four airports in District 4 including Destin-Fort Walton Beach (VPS), Northwest Florida Beaches International (ECP), Pensacola International (PNS), and Tallahassee International (TLH).

Destin–Fort Walton Beach (VPS)

The Destin-Fort Walton area is a popular leisure destination in the Florida Panhandle, situated on the Gulf coast between Pensacola and Panama City. VPS is a small hub airport that serves as the key gateway for leisure traffic, bringing in most of the passenger activity in the summer months. In Q1 2020, schedule frequency increased while seat availability declined, indicating that airlines have shifted towards offering more frequent flights using smaller regional aircraft. The trend stops abruptly in Q2 2020 with the pandemic cutting schedule frequency and available seating across the board. May 2020 saw the largest discrepancy in departure frequency as 53 percent of scheduled service was cut relative to the prior year. However, this gap quickly closed in July and August, and by October 2020, the departure frequency is reported to be greater than the previous year. **Figure 2-24** presents a comparison of the monthly departure frequency at VPS between 2019 and 2020.

Figure 2-24: VPS Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Despite the rebound in traffic during Q3 2020, the top destinations for VPS still reported a negative YoY percentage change in scheduled departure frequency. However, the total number of destinations offered from VPS increased from 36 to 41 (13.9 percent), indicating that airline traffic is continuing to grow despite the pandemic. **Table 2-14** summarizes the airline departure frequencies at the top interstate destinations for VPS.

Table 2-14: VPS Top Interstate Destinations

Airport Name	FAA ID	2019 Frequency	2020 Frequency	% YoY Change
Atlanta Hartsfield-Jackson International	ATL	1,963	1,396	-29%
Dallas/Fort Worth International	DFW	1,428	1,091	-24%
Charlotte Douglas International	CLT	1,213	1,191	-2%
Houston George Bush Intercontinental	IAH	822	463	-44%
Cincinnati/Northern Kentucky International	CVG	286	276	-3%

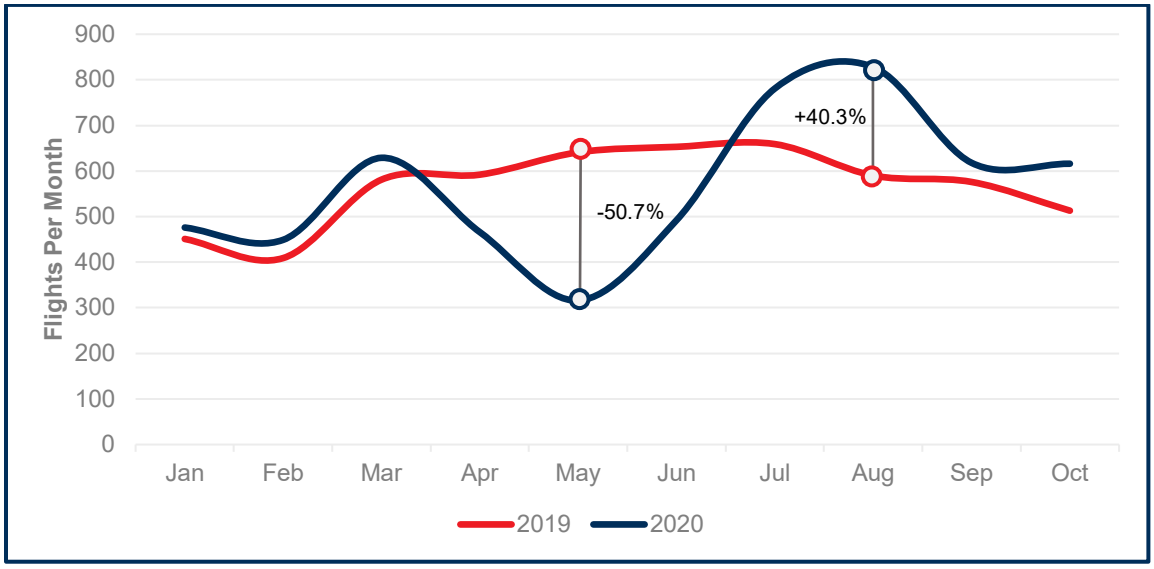
Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Northwest Florida Beaches International (ECP)

ECP is a small hub airport located in the Florida Panhandle, located 16 miles northeast of Panama City. Panama City Beach is one of the many popular beaches along the Gulf coast which attracts a significant amount of tourist traffic to the region. ECP provides access between Panama City and several large hub airports across the country. As such, ECP traditionally receives more airline traffic during spring break and the summer months. ECP experienced YoY growth in airline traffic during Q1 before departure

frequency declined rapidly in April. As with other airports, the lowest airline traffic levels were reported in May, as airline departures were down almost 51 percent from May 2019. However, airline traffic at ECP rebounded in June, and schedule frequency exceeded 2019 levels in July. Departure frequency at ECP reached its peak in August before declining in September, possibly due to the increase in COVID-19 cases in July and August and the end of the traditional peak tourism season in the region. **Figure 2-25** shows the airline departure frequency at ECP between 2019 and 2020.

Figure 2-25: ECP Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

The scheduled airline departure frequency to top interstate destinations from ECP increased in 2020 relative to 2019, as shown in **Table 2-15**. Additionally, the total number of airline destinations available from ECP increased seven percent in 2020, providing further evidence that airline traffic has continued to grow throughout the crisis.

Table 2-15: ECP Top Interstate Destinations

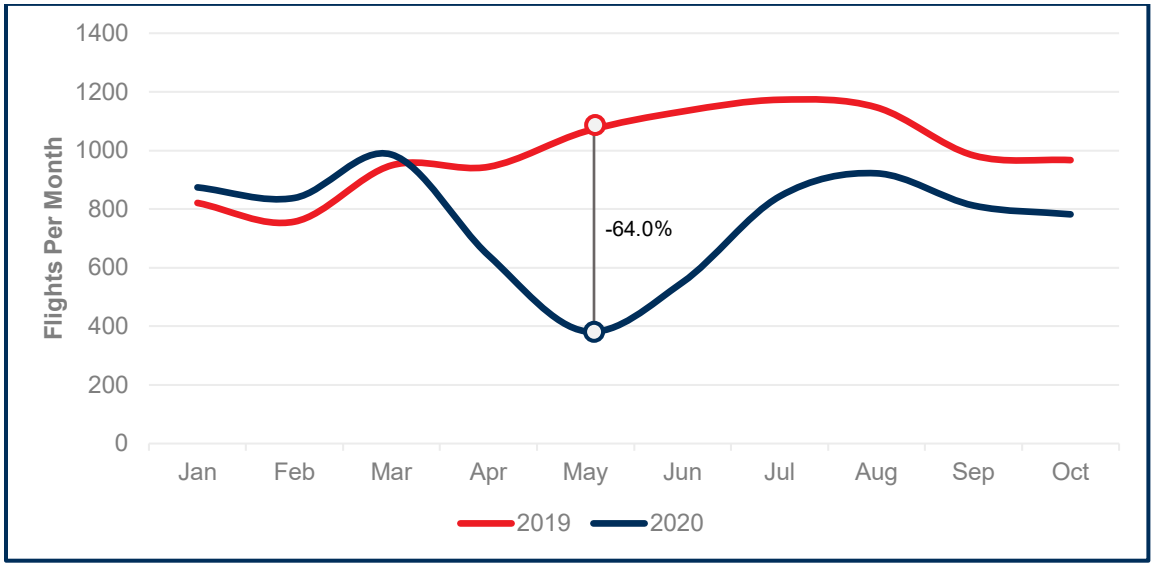
Airport Name	FAA ID	2019 Frequency	2020 Frequency	% YoY Change
Atlanta Hartsfield-Jackson International	ATL	1,742	1,322	-24%
Nashville International	BNA	690	907	31%
Dallas/Ft Worth International	DFW	633	645	2%
Charlotte Douglas International	CLT	624	661	6%
Dallas Love Field	DAL	528	594	13%

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Pensacola International (PNS)

PNS is a small hub airport that serves as the primary commercial service airport for Pensacola and the western Florida Panhandle. The area is a popular leisure destination in the summertime as tourists flock to the region to enjoy dozens of beaches and golf courses. As such, PNS serves a high level of leisure passengers every year and offers year-round nonstop service to more than 10 airports nationwide. In Q1 2020, schedule frequency was greater than the same period in 2019. The pandemic initially impacted airline departure frequency in April and traffic reached its lowest point in May as the airport saw a 64 percent lower scheduled departure volume compared to the prior year. This negative discrepancy continued through the remainder of Q2 and into Q3 2020, although scheduled departures increased between June and August. This resulted in a net loss in scheduled departure frequency of 23 percent from January through October 2020 compared to schedules in 2019. **Figure 2-26** illustrates the changes in scheduled departure frequency between 2019 and 2020.

Figure 2-26: PNS Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

The loss in scheduled departure frequency at PNS shown above is reflected in the scheduled departure changes to four of the airport's top five destinations. Additionally, airlines at PNS reduced the number of available destinations by six percent. **Table 2-16** indicates the top interstate destinations from PNS and the schedule frequency changes.

Table 2-16: PNS Top Interstate Destinations

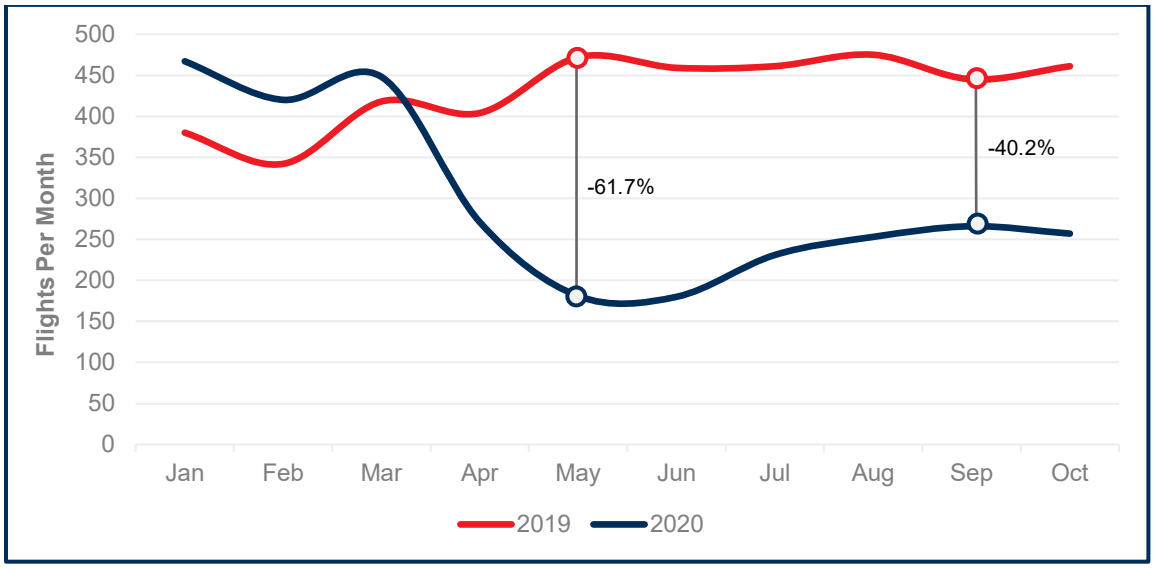
Airport Name	FAA ID	2019 Frequency	2020 Frequency	% YoY Change
Atlanta Hartsfield-Jackson International	ATL	2,350	1,671	-29%
Dallas/Fort Worth International	DFW	1,468	1,241	-15%
Houston George Bush Intercontinental	IAH	1,462	929	-36%
Charlotte Douglas International	CLT	1,434	1,203	-16%
Nashville International	BNA	615	655	7%

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Tallahassee International (TLH)

TLH is a nonhub airport located in the middle of the Florida Panhandle which serves the greater Tallahassee region. As Tallahassee is the capital of Florida, TLH receives high levels of business traffic. This in turn meant the pandemic caused airline departure frequency to decline rapidly in April 2020 and remain depressed through October. May recorded a 62 percent YoY reduction in scheduled departure frequency, the greatest relative decline of any month. Airline traffic increased slightly between July and September but remained approximately 40 percent lower than the previous years. However, TLH still experienced a decline of approximately 31 percent of scheduled departures relative to 2019. TLH also experienced a similar trend in monthly seating availability as a result of airlines cutting capacity into TLH. **Figure 2-27** summarizes the scheduled airline departure frequency at TLH between 2019 and 2020.

Figure 2-27: TLH Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Table 2-17 presents the four available destinations from TLH and the changes to scheduled departures to these airports, all of which are large airline hubs. Given that airlines only offer service to four destinations, there was no change in the total number of airports accessible from TLH.

Table 2-17: TLH Top Interstate Destinations

Airport Name	FAA ID	2019 Frequency	2020 Frequency	% YoY Change
Atlanta Hartsfield-Jackson International	ATL	2,062	1,303	-37%
Charlotte Douglas International	CLT	1,187	850	-28%
Ronald Reagan Washington National	DCA	765	644	-16%
Dallas/Fort Worth International	DFW	303	177	-42%

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

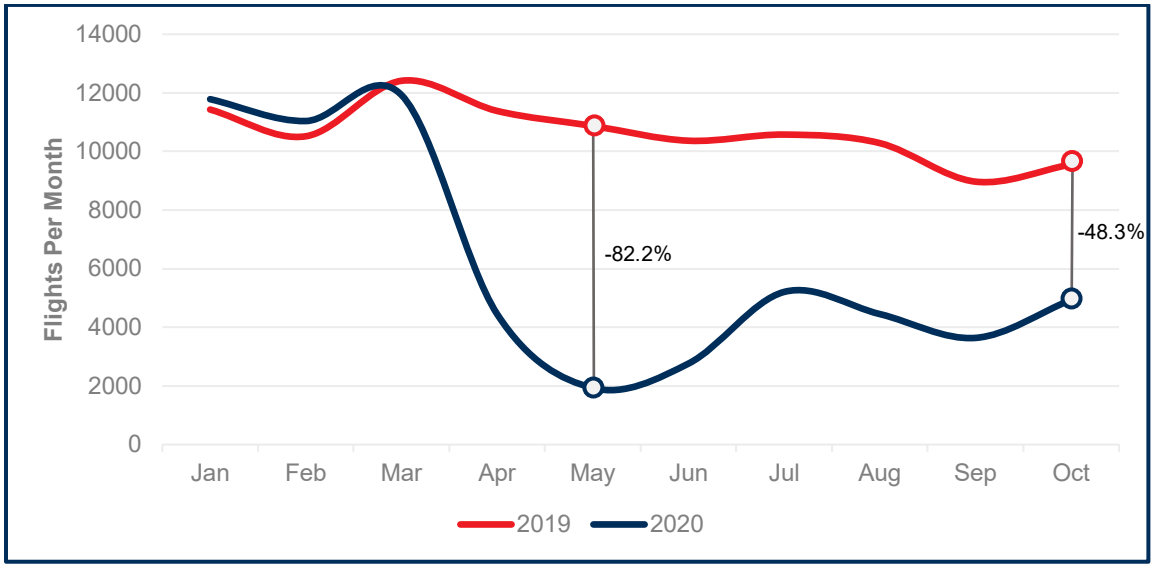
2.4.3.4. District 4

The following section provides individualized airline schedule comparisons for District 4 airports which include Fort Lauderdale/Hollywood International (FLL), Vero Beach Regional (VRB), and Palm Beach International (PBI).

Fort Lauderdale/Hollywood International (FLL)

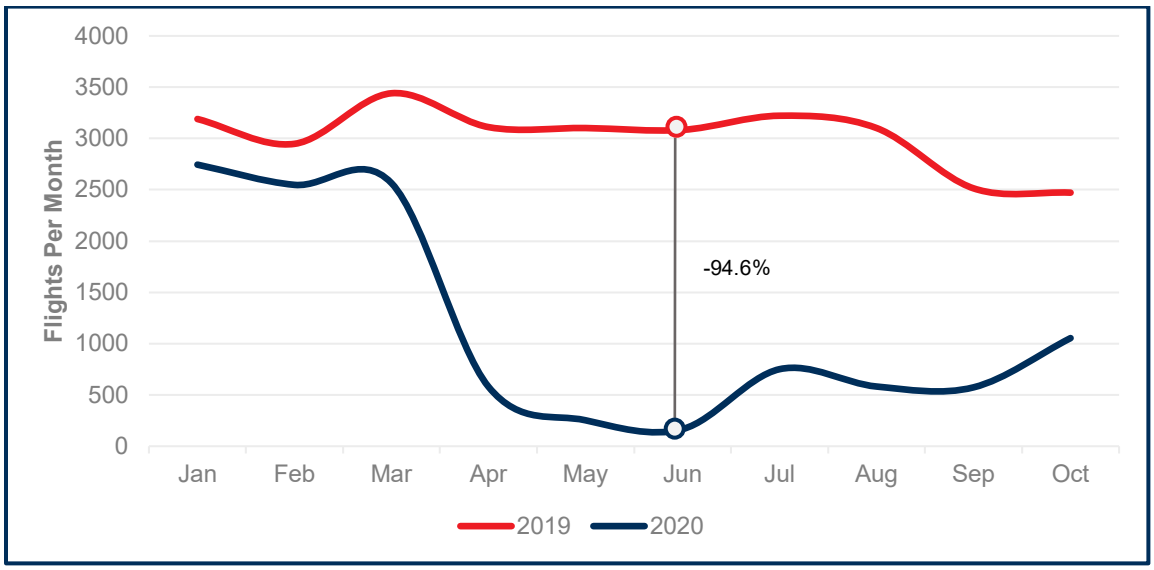
FLL is a large hub airport and one of the busiest airports in Florida, serving the combined Fort Lauderdale and Miami area. FLL receives a combination of leisure and business traffic and offers service to more than 130 domestic and international nonstop destinations. FLL serves high levels of international airline traffic, and as a result, the pandemic had a significant impact on total schedule frequency to FLL. The decline in airline traffic started in March and reached its lowest point in May, when scheduled departure frequency decreased 82 percent compared to 2019. There was some recovery in scheduled departure frequency through June and July, but the airline traffic at the airport remains down 48 percent from the previous year as of October 2020. **Figure 2-28** presents a comparison of total scheduled departure frequency between 2019 and 2020, while **Figure 2-29** compares the frequency of international flights only.

Figure 2-28: FLL Scheduled Airline Departure Frequency Comparison – Domestic and International



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Figure 2-29: FLL Scheduled Airline Departure Frequency Comparison – International Only



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Twenty-five airlines provide service from FLL to 140 destinations around the globe. However, the number of available destinations declined 2 percent due to the pandemic. The drastic decline in scheduled departures is apparent among all the top destinations for FLL, as shown in **Table 2-18**. The top five destinations that FLL serves are all large airlines with all serving as hubs except Baltimore/Washington International (BWI).

Table 2-18: FLL Top Interstate Destinations

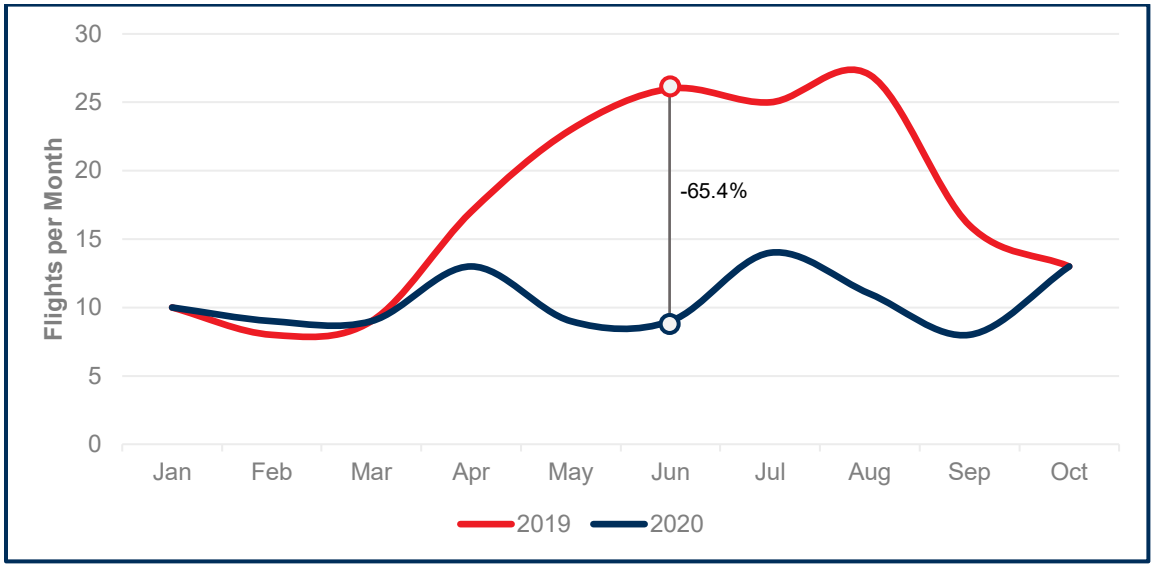
Airport Name	FAA ID	2019 Frequency	2020 Frequency	% YoY Change
Atlanta Hartsfield-Jackson International	ATL	7,279	4,568	-37%
Newark Liberty International	EWR	4,096	2,700	-34%
Baltimore/Washington International	BWI	3,518	2,496	-29%
Dallas/Fort Worth International	DFW	2,512	1,951	-22%
Chicago O'Hare International	ORD	1,985	1,978	0%

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Vero Beach Regional (VRB)

VRB is a non-primary commercial service airport that serves Vero Beach and the east coast of Florida between Port Canaveral and West Palm Beach. VRB is served by Elite Airways, which provides scheduled service for leisure travelers to connect from unique destinations in the northern United States. Similar to other leisure airports, VRB traditionally receives drastically higher levels of airline service during the summer months. The impacts of the pandemic have been significant at VRB, as airline service frequencies have remained near wintertime levels throughout the summer months. Scheduled departures initially dipped to minimum levels in May and June before recovering slightly in July and August before once again declining in September. It is important to note that airport representatives reported that all airline service temporarily ceased in April, however, scheduled departure frequency data does not reflect this change as the flights were originally scheduled by the airline before the pandemic began. The responses of airport representatives regarding this and other impacts is discussed in **Chapter 1**. **Figure 2-30** shows scheduled airline departure frequency at VRB between 2019 and 2020.

Figure 2-30: VRB Scheduled Airline Departure Frequency



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

In 2019, VRB only provided service to three interstate destinations: Newark Liberty International (EWR), Portland International (PWM), and Asheville Regional (AVL). Service to all three destinations declined, and Asheville was cut entirely from Elite Airways' schedules, however it appears that the service ended prior to the start of the pandemic. The three destinations served from VRB are shown in **Table 2-19.**

Table 2-19: VRB Top Interstate Destinations

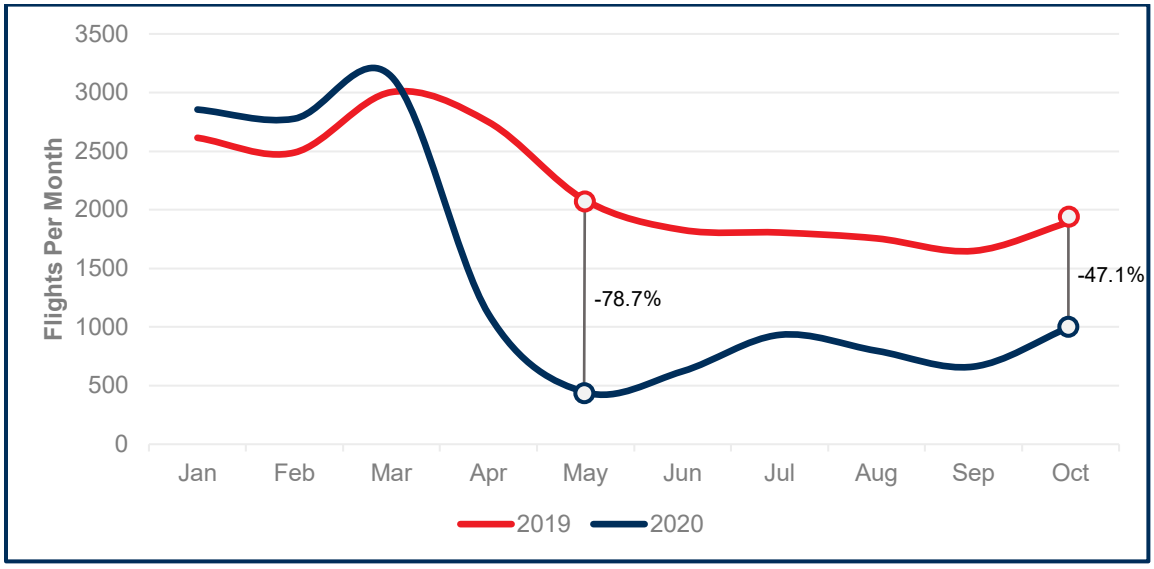
Airport Name	FAA ID	2019 Frequency	2020 Frequency	% YoY Change
Newark Liberty International	EWR	105	86	-18%
Portland International (ME)	PWM	38	19	-50%
Asheville Regional	AVL	31	0	-100%

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Palm Beach International (PBI)

PBI is a medium hub airport located near West Palm Beach, north of Fort Lauderdale. West Palm Beach is a popular tourist destination and attracts a large number of leisure travelers during the spring season. PBI began to experience the impacts of the pandemic in April and scheduled departure frequency reached its lowest point in May as airline traffic was down nearly 79 percent from the previous year. Scheduled departures increased slightly in June and July before declining in August and September, likely a result of the increase in COVID-19 cases in the region. **Figure 2-31** presents a comparison of scheduled airline departures at PBI between 2019 and 2020.

Figure 2-31: PBI Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Normally PBI is served by 12 airlines that offer nonstop service to more than 30 destinations around the globe. The top destinations served by airlines at PBI are all large airline hubs. As shown in **Table 2-20,** all destinations recorded a decline in scheduled departure frequency with the exception of Baltimore/ Washington International (BWI). Additionally, airlines reduced the number of destinations available at PBI by nine percent between 2019 and 2020.

Table 2-20: PBI Top Interstate Destinations

Airport Name	FAA ID	2019 Frequency	2020 Frequency	% YoY Change
Atlanta Hartsfield-Jackson International	ATL	3,465	1,943	-44%
Newark Liberty International	EWR	2,600	1,597	-39%
Boston Logan International	BOS	1,676	1,054	-37%
Charlotte Douglas International	CLT	1,572	1,227	-22%
Baltimore/Washington International	BWI	897	1,086	21%

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

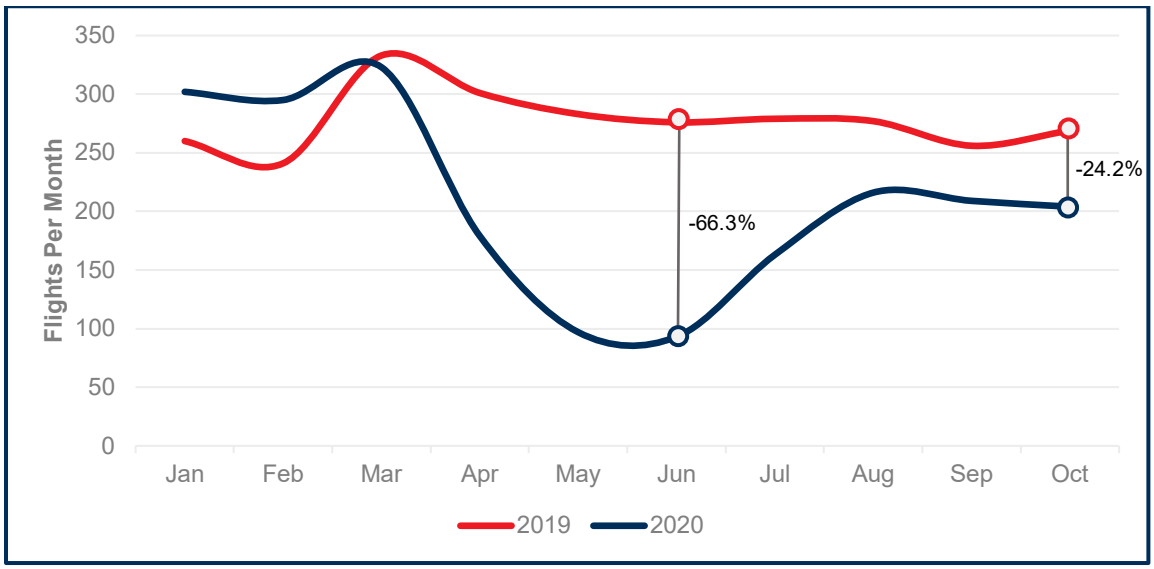
2.4.3.5. District 5

The following section provides an analysis of the scheduled airline departure frequency and top interstate destinations from the two airports in District 5, which includes Daytona Beach International (DAB), Melbourne International (MLB), Orlando International (MCO), and Orlando Sanford International (SFB).

Daytona Beach International (DAB)

DAB is a nonhub airport located on the east central coast of Florida, three miles southwest of Daytona Beach. The Daytona Beach area is popular for leisure beachgoers and tourists. Traditionally, DAB receives the most airline traffic in early spring as thousands of visitors travel to beaches in the area and to attend races at the Daytona International Speedway, located adjacent to the airport. DAB saw YoY traffic growth in Q1 2020 before traffic rapidly declined in April. Once again, the lowest departure frequency was recorded in May, as scheduled departures were down 66 percent from 2019. Airline traffic increased in July and August before declining in September, which is comparable to traffic levels in previous years. **Figure 2-32** provides a comparison of scheduled departure frequency, which closely correlates with the decline of airline seating availability at DAB.

Figure 2-32: DAB Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Airlines at DAB provide nonstop service to only a handful of destinations, all of which are large hub airports in the U.S. and Canada. As such there was no change in the total number of destinations offered by airlines at the airport. However, all three destinations recorded drastic reductions to scheduled departure frequency, as shown in **Table 2-21**.

Table 2-21: DAB Top Interstate Destinations

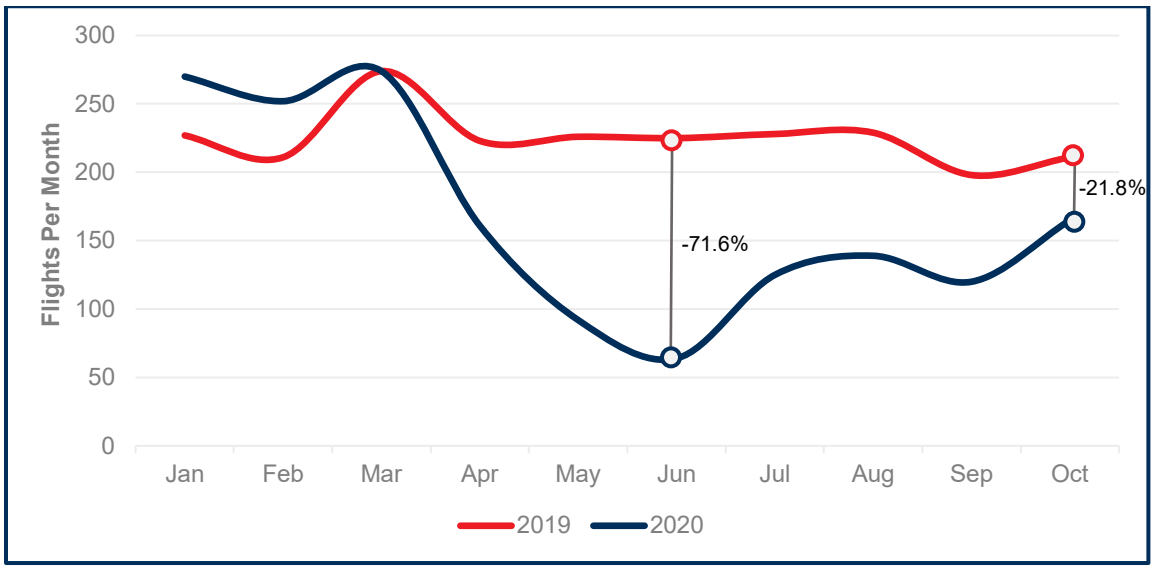
Airport Name	FAA ID	2019 Frequency	2020 Frequency	% YoY Change
Atlanta Hartsfield-Jackson International	ATL	1,433	1,027	-28%
Charlotte Douglas International	CLT	1,299	1,037	-20%
New York LaGuardia	LGA	35	15	-57%

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Melbourne International (MLB)

MLB is a nonhub airport that serves as the primary airport for Melbourne and as a secondary airport for the Orlando metropolitan area. Situated on Florida's east central coast, Melbourne is a vibrant beach destination and business center for Brevard County that generates a great amount of economic activity in the region. MLB and the entire Melbourne region was adversely impacted by the pandemic, as airline departures were cut significantly in March through May 2020. MLB recorded the lowest number of scheduled departures in June, 72 percent lower than the prior year. This gap closed in the two following months, however, the average airline departure frequency through October 2020 is expected to be 28.4 percent lower than 2019. **Figure 2-33** shows the changes to airline scheduled departure frequencies between 2019 and 2020.

Figure 2-33: MLB Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Prior to the pandemic, airlines at MLB provided nonstop service to 11 domestic and international destinations that vary between large hubs and smaller regional airports. However, the number of available destinations was slashed by more than 60 percent between January and October 2020 compared to the previous year. Airline departures to top destinations including Atlanta and Charlotte declined in 2020 compared to 2019. However, American Airlines service to Philadelphia increased dramatically from 2019, which has balanced out losses in departures to other destinations. **Table 2-22** summarizes the top destinations served by airlines at MLB as well as changes to scheduled departure frequency.

Table 2-22: MLB Top Interstate Destinations

Airport Name	FAA ID	2019 Frequency	2020 Frequency	% YoY Change
Atlanta Hartsfield-Jackson International	ATL	1,207	808	-33%
Charlotte Douglas International	CLT	910	735	-19%
Philadelphia International	PHL	33	118	258%

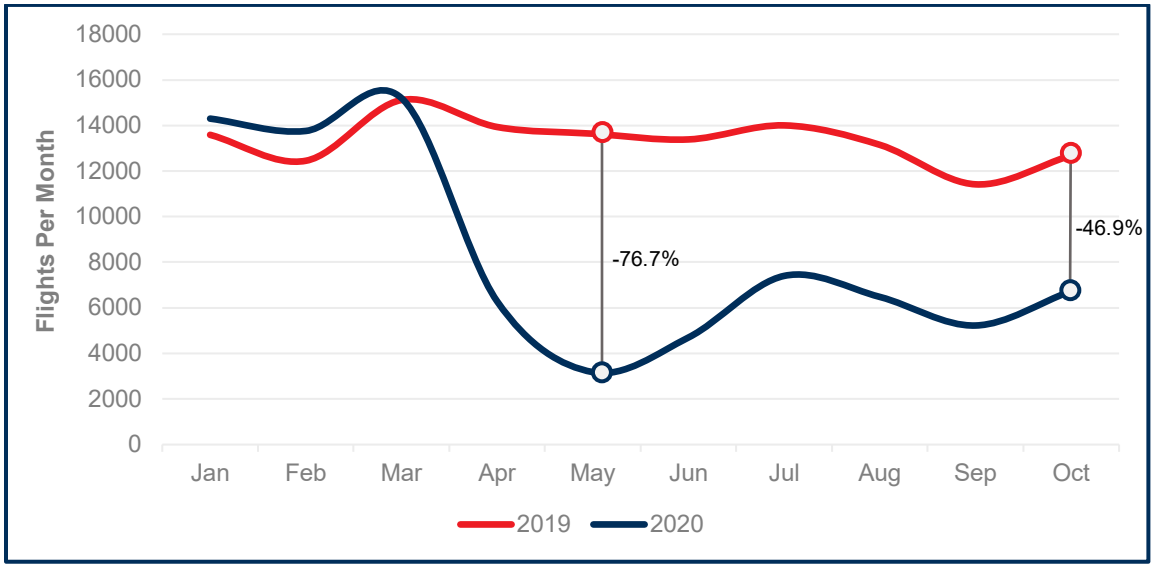
Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Orlando International (MCO)

MCO is the busiest domestic airport in Florida in terms of enplanements, consistently processing more than 50 million passengers every year.[6] Orlando is home to multiple attractions including Walt Disney World, Universal Orlando, and SeaWorld Orlando, as well as numerous corporate headquarters including AAA, Marriott Vacations, and Darden Restaurants.[7] The pandemic quickly halted MCO's activity starting in April 2020. The lowest scheduled departure frequency was reached in May, as only 3,178 departures were scheduled for the month, 77 percent lower than the prior year. This gap narrowed in June and July as local attractions reopened to the public, however, traffic again declined in August and September as the peak travel season drew to a close. International traffic, meanwhile, experienced a steep decline in April and has remained virtually nonexistent as international departure frequencies have not exceeded 10 percent of the previous year's levels since May. **Figure 2-34** and **Figure 2-35** show the comparison in overall schedule frequency and international flight frequency from MCO, respectively.

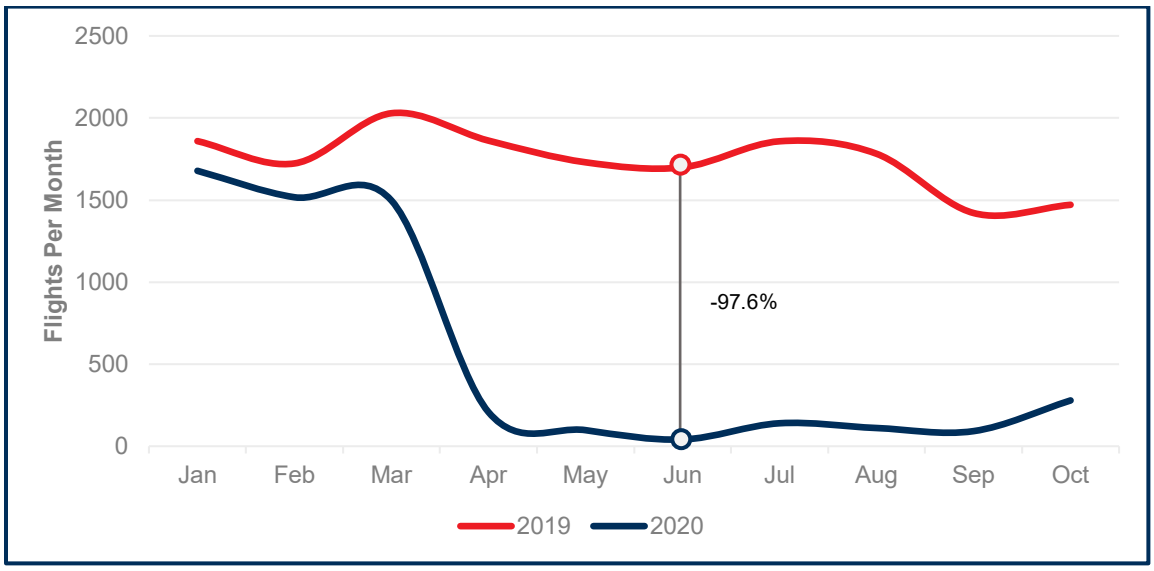
[6] Orlando International Airport. (February 2020). "Orlando International Airport Ends 2019 with Record 50 Million Passengers". (Accessed September 2020).
[7] Orlando Economic Partnership. (2020). "Headquarters and Regional Operations". (Accessed September 2020).

Figure 2-34: MCO Scheduled Airline Departure Frequency Comparison – Domestic and International



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Figure 2-35: MCO Scheduled Airline Departure Frequency Comparison – International Only



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

MCO is served by more than 30 carriers that offer nonstop services to 120 destinations around the globe. The pandemic forced airlines to cut this network by nearly 50 percent to 60-70 nonstop destinations. These cuts in service reflect the trends in the aviation industry as a whole, and, as such, all of the top five destinations from MCO experienced a reduction of flight frequency of at least 25 percent, as presented in **Table 2-23**

Table 2-23: MCO Top Interstate Destinations

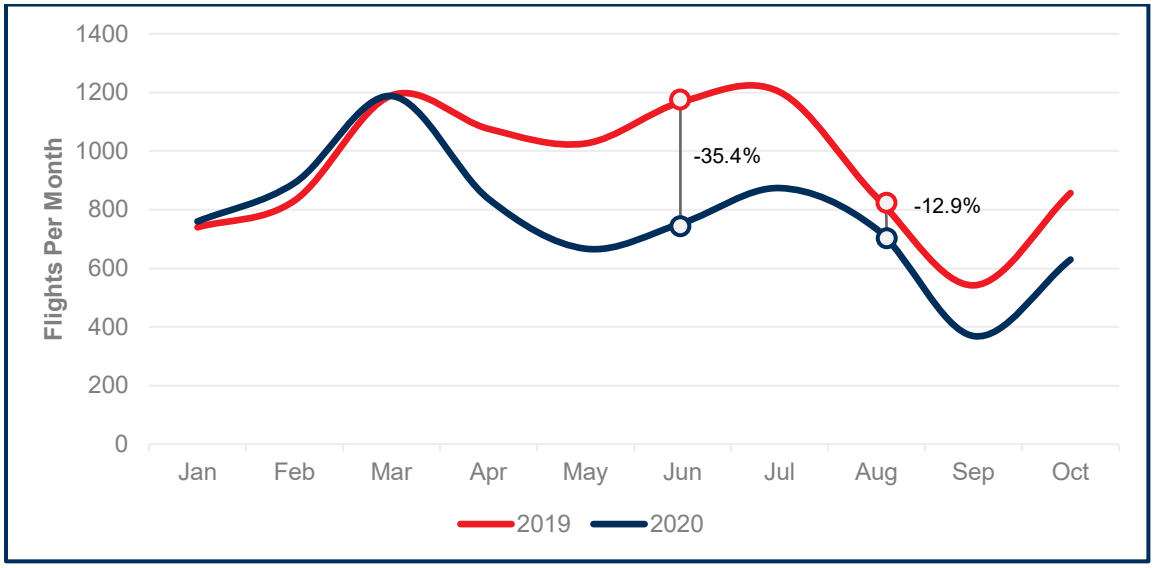
Airport Name	FAA ID	2019 Frequency	2020 Frequency	% YoY Change
Atlanta Hartsfield-Jackson International	ATL	7,829	4,850	-38%
Newark Liberty International	EWR	5,656	3,594	-36%
Philadelphia International	PHL	4,773	3,538	-26%
San Juan Luis Munoz Marin International	SJU	4,377	3,280	-25%
Chicago O'Hare International	ORD	3,954	2,531	-36%

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Orlando Sanford International

Orlando Sanford (SFB) is a small hub airport that acts as a secondary airport for the greater Orlando metropolitan area. Primarily served by Allegiant Airlines, this airport complements MCO with additional domestic and limited international charter service. The domestic-heavy traffic combined with the leisure popularity of Orlando allowed SFB to retain more of its schedule frequency despite the pandemic. The pandemic started to impacted airline schedules in April 2020 and by June, the scheduled departure frequency at SFB had been cut by 35 percent compared to the previous year. The discrepancy in departure frequency closed to 13 percent in August as SFB entered its traditional peak travel season, but quickly widened again in the fall months when leisure traffic tourism is typically the weakest. **Figure 2-36** illustrates the changes in scheduled departure frequency between 2019 and 2020.

Figure 2-36: SFB Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Allegiant Airlines primarily operates a point-to-point route network that avoids major hub airports. Because of this, the destinations served from SFB are smaller airports in the northern part of the United States and schedule frequency is distributed evenly between destinations. When the pandemic began, airlines reduced the number of available destinations by more than 17 percent. However, the impacts of the pandemic on scheduled departure frequency varied by destination, as some destinations lost more than 30 percent of scheduled departures, while others gained additional flights. **Table 2-24** presents the top destinations from SFB and a comparison of scheduled departures between 2019 and 2020.

Table 2-24: SFB Top Interstate Destinations

Airport Name	FAA ID	2019 Frequency	2020 Frequency	% YoY Change
McGhee Tyson Airport (Knoxville, TN)	TYS	435	295	-32%
Lehigh Valley International (Allentown, PA)	ABE	429	345	-20%
Asheville Regional (Asheville, TN)	AVL	357	348	-3%
Cincinnati/Northern Kentucky International	CVG	327	305	-7%
Gerald R. Ford International (Grand Rapids, MI)	GRR	298	303	2%

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

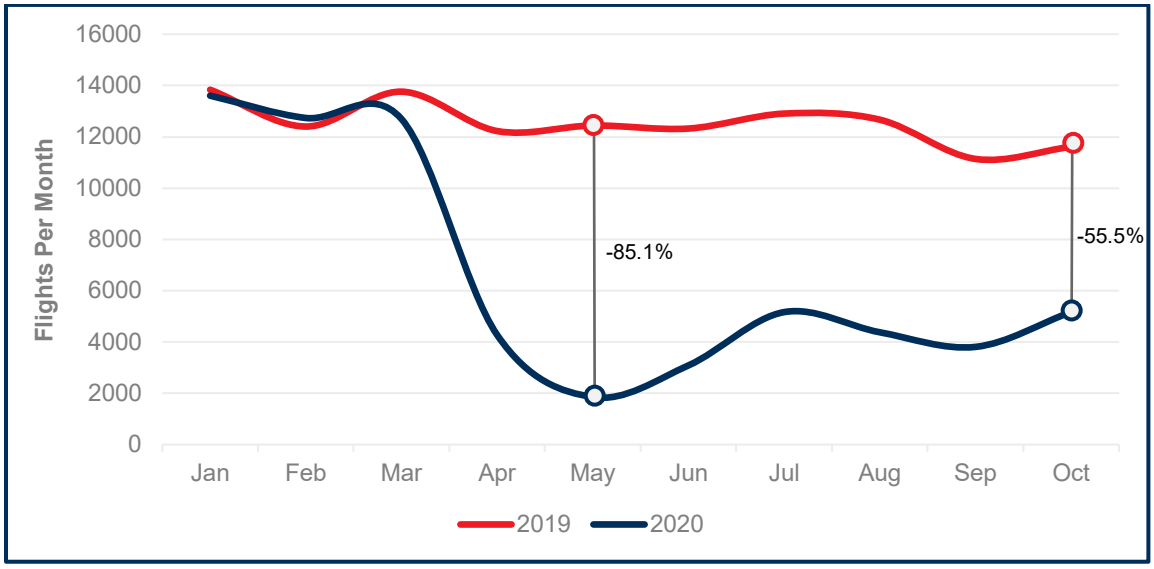
2.4.3.6. District 6

The following section discusses the changes in scheduled airline departures between 2019 and 2020 at Miami International (MIA) and Key West International (EYW) as well as the top airline destinations served from each airport.

Miami International (MIA)

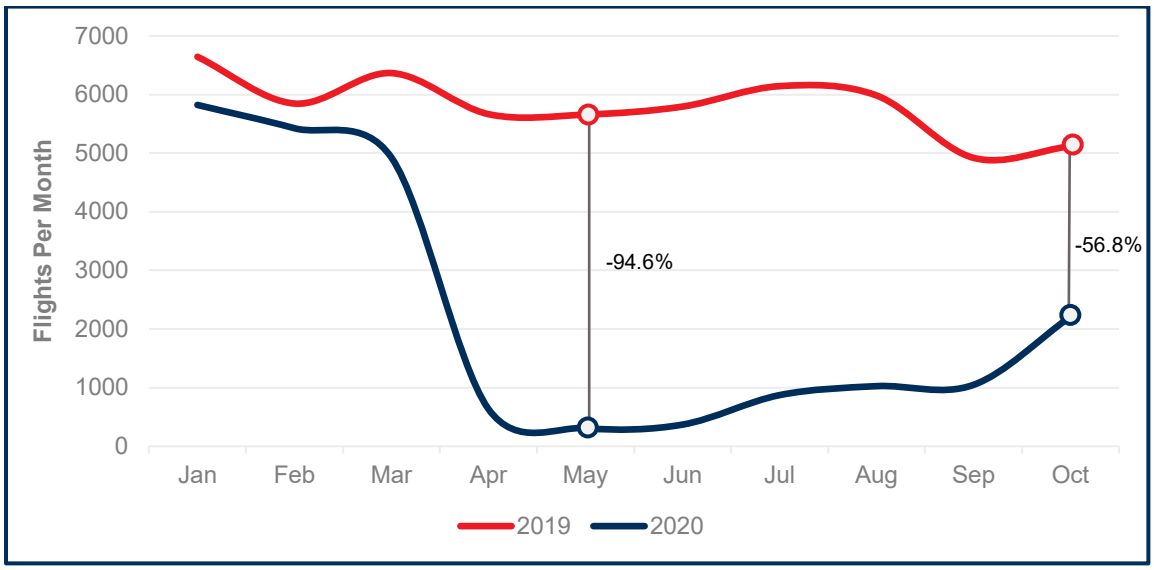
MIA is the busiest airport in Florida in terms of international service and one of the busiest in the nation. While FLL is primarily served by domestic carriers, MIA functions as both the domestic and international hub for southern Florida. MIA is the primary hub for American Airlines' Latin American and Caribbean network, which contributes to a large share of the airport's total airline traffic. As the pandemic impacted international operations the most, MIA has experienced one of the largest declines in overall scheduled departure frequency of any Florida airport. The lowest level of airline activity at MIA occurred in May as only 1,853 departures were scheduled, 85 percent lower than May 2019. International traffic drastically decreased in April and remained depressed by more than 80 percent from the previous year. Domestic departure frequency increased in June and July, but the cut in international traffic kept MIA from returning to the airline service levels that existed before the pandemic. **Figure 2-37** and **Figure 2-38** highlight the combined scheduled departure frequency trends and the international departure frequency trends observed at MIA, respectively.

Figure 2-37: MIA Scheduled Airline Departure Frequency Comparison – Domestic and International



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Figure 2-38: MIA Scheduled Airline Departure Frequency Comparison– International Only



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Prior to the pandemic, MIA provided nonstop service to more than 140 destinations around the world. The pandemic forced airlines at MIA to cut the number of available destinations and the scheduled departure frequency to these destinations by approximately 50 percent. The five top destinations from MIA, all of which are airline hubs, experienced a decline in departure frequency in 2020 relative to 2019. These destinations and frequency changes are summarized in **Table 2-25**.

Table 2-25: MIA Top Interstate Destinations

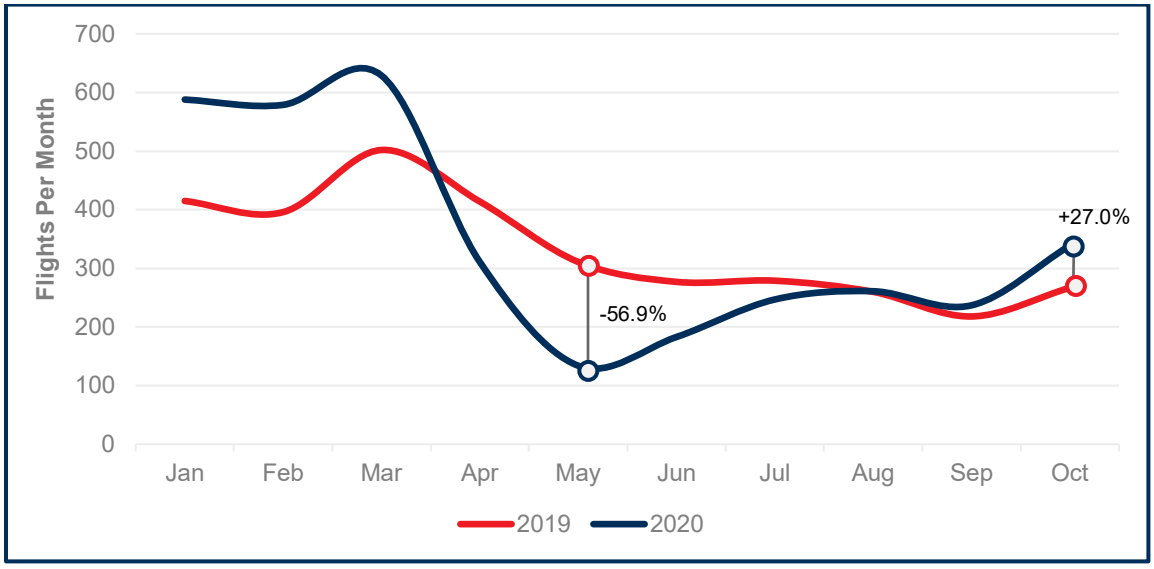
Airport Name	FAA ID	2019 Frequency	2020 Frequency	% YoY Change
Atlanta Hartsfield-Jackson International	ATL	5,855	3,269	-44%
New York LaGuardia	LGA	4,731	2,393	-49%
Chicago O'Hare International	ORD	3,385	2,502	-26%
Dallas/Fort Worth International	DFW	3,065	2,565	-16%
Newark Liberty International	EWR	2,380	2,502	5%

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Key West International (EYW)

EYW is a nonhub airport serving the Florida Keys, a popular leisure destination for domestic and international travelers visiting one of many beaches and attractions in the area. EYW mainly receives leisure traffic throughout the year but experiences heightened traffic levels around spring break. The pandemic forced airlines to start cutting scheduled departures in April 2020. By May, scheduled departure frequency had been cut by 57 percent relative to the prior year. However, airline traffic rebounded quickly in June and July, exceeding the number of flights scheduled in 2019. Because of this, EYW recorded a five percent gain in scheduled departure frequency between January through October 2020 compared to the prior year. **Figure 2-39** compares the scheduled airline departure frequencies at EYW between 2019 and 2020.

Figure 2-39: EYW Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Seven airlines provide year-round or seasonal nonstop service to eight airports in the United States from EYW, most of which are large airline hubs. However, airlines reduced the number of destinations available from EYW by 25 percent due to the pandemic. Year-over-year changes to frequency varied considerably between destinations, as some destinations including Newark Liberty International (EWR) recorded a decline in departure frequency while other airports including Chicago O'Hare International (ORD) doubled the number of scheduled flights between 2019 and 2020. **Table 2-26** summarizes the top destinations served by airlines at EYW and changes to flight frequency at each destination.

Table 2-26: EYW Top Interstate Destinations

Airport Name	FAA ID	2019 Frequency	2020 Frequency	% YoY Change
Atlanta Hartsfield-Jackson International	ATL	1,487	1,055	-29%
Charlotte Douglas International	CLT	627	869	+39%
Newark Liberty International	EWR	476	314	-34%
Dallas/Ft Worth International	DFW	291	344	+18%
Chicago O'Hare International	ORD	206	416	+102%

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

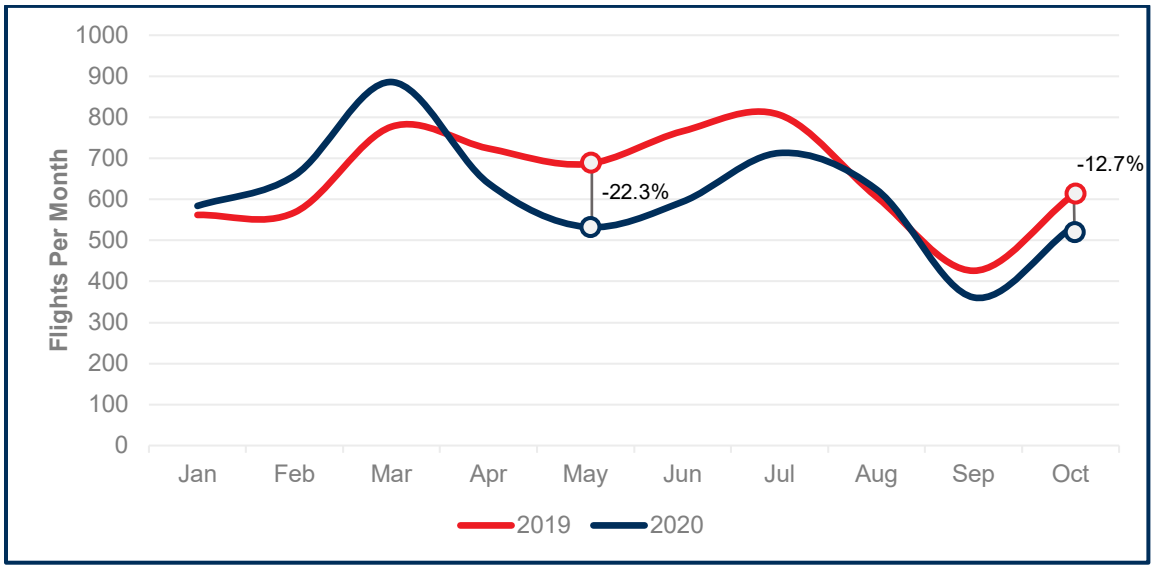
2.4.3.7. District 7

This section discusses the top airline destinations and scheduled airline frequency for both airports in District 7: St. Pete-Clearwater International (PIE) and Tampa International (TPA).

St. Pete-Clearwater International (PIE)

PIE is a small hub airport located west of Tampa between St. Petersburg and Clearwater. PIE is an operating base for Allegiant Airlines which provides service to more than 50 nonstop destinations across the country. Similar to other leisure destination airports in the state, the impacts of the pandemic at PIE were relatively modest. The decline in scheduled departures began in April and bottomed out in May, when scheduled departures decreased 22 percent from the prior year. Traffic quickly rebounded in June and July as the airport reached its traditional peak travel season. Scheduled departures decreased in August and September, similar to 2019 schedules. **Figure 2-40** present a comparison in scheduled airline departures at PIE between 2019 and 2020.

Figure 2-40: PIE Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Prior to the pandemic, Allegiant Airlines provided service to more than 50 destinations ranging from small regional airports to large hubs in the northeastern United States. However, airlines reduced the number of available destinations by 15 percent between 2019 and 2020. Additionally, airlines reduced service to many destinations, including four of the top five destinations served at PIE. **Table 2-27** summarizes the top destinations served from PIE and the changes to airline schedules between 2019 and 2020.

Table 2-27: PIE Top Interstate Destinations

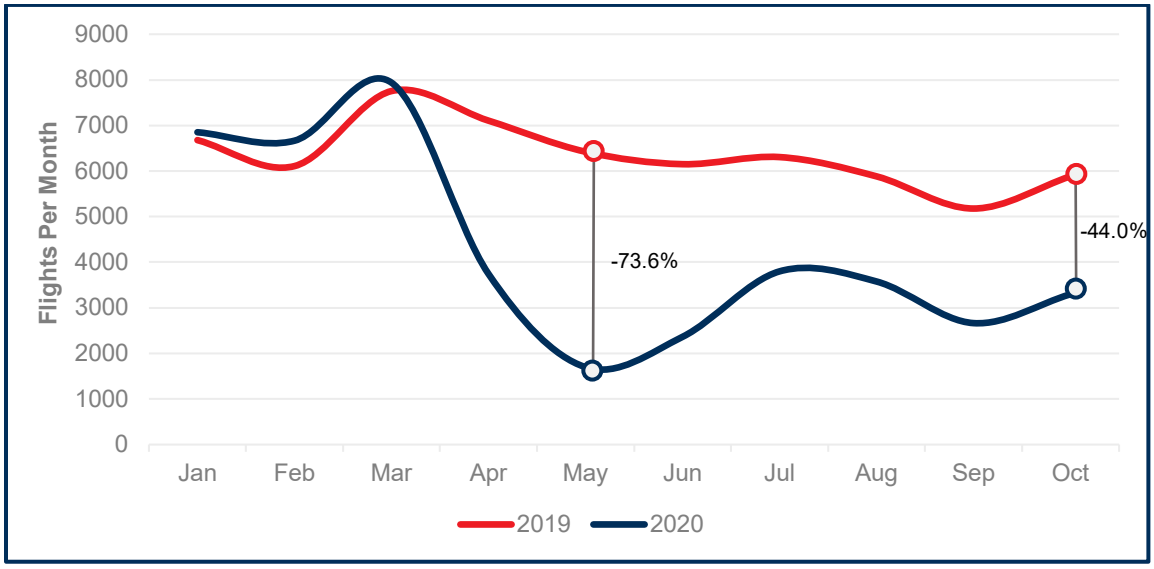
Airport Name	FAA ID	2019 Frequency	2020 Frequency	% YoY Change
Asheville Regional (Asheville, TN)	AVL	386	294	-24%
Cincinnati/Northern Kentucky International	CVG	327	316	-3%
Indianapolis International	IND	286	250	-13%
McGhee Tyson (Knoxville, TN)	TYS	275	228	-17%
Gerald R. Ford International (Grand Rapids, MI)	GRR	255	296	16%

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Tampa International (TPA)

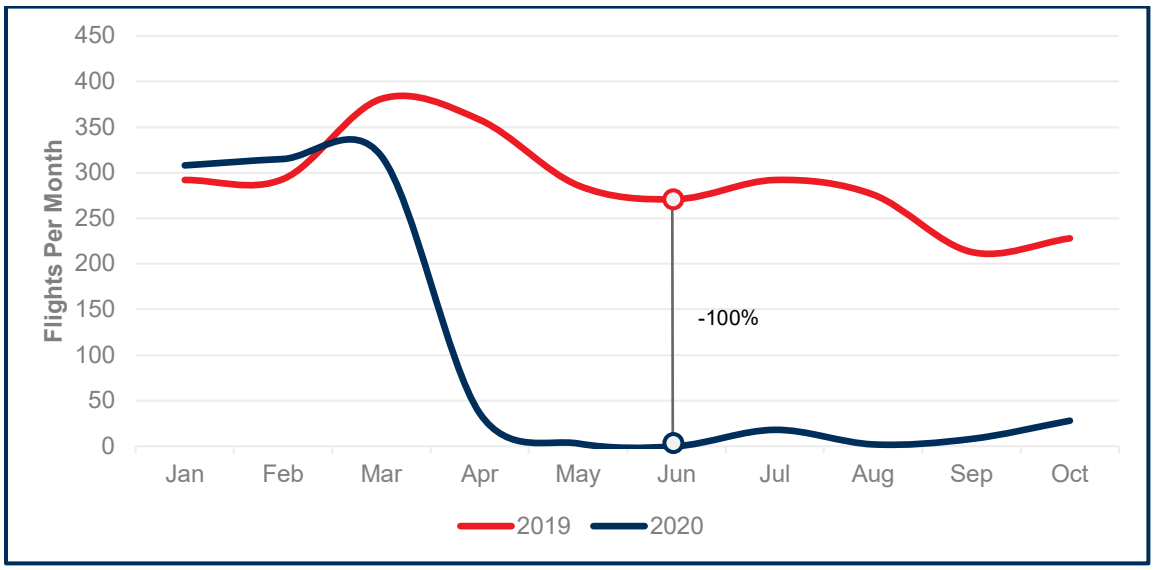
TPA is one of the busiest large hub airports in Florida and acts as the primary airport for the greater Tampa-St. Petersburg Metropolitan Area. TPA receives both leisure and business traffic carried by more than 20 domestic and international airlines that operate at the airport. Due to the significant cuts in international flights made in response to the pandemic, TPA experienced one of the largest declines in scheduled departures among all Florida airports. TPA's departure frequency reached its minimum level in May when total departures amounted to only 1,698 for the month, nearly 74 percent lower than the prior year. This disparity closed in the subsequent months, possibly as a result of the resurgence in leisure travel in the region. However, airline traffic declined in the fall months when leisure travel traditionally is at the lowest levels in the year. Additionally, international airline service declined to near zero levels in May and have remained below 10 percent of the previous year's traffic through August. As a result, TPA has recorded a 33 percent loss in scheduled departure frequency from 2019. **Figure 2-41** illustrates the comparison in overall scheduled departure frequency between 2019 and 2020. **Figure 2-42** provides an isolated analysis of international flight frequency changes between 2019 and 2020.

Figure 2-41: TPA Scheduled Airline Departure Frequency Comparison – Domestic and International



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Figure 2-42: TPA Scheduled Airline Departure Frequency Comparison – International Only



Sources: OAG Schedule Analyzer, Kimley-Horn 2020

TPA typically provides airline service to more than 150 destinations around the globe. As a result of the pandemic, airlines reduced the number of nonstop destinations from TPA by 30 to 40 percent compared to the prior year. Additionally, airlines reduced flight frequency to the top five destinations served at TPA as shown in **Table 2-28**.

Table 2-28: TPA Top Interstate Destinations

Airport Name	FAA ID	2019 Frequency	2020 Frequency	% YoY Change
Atlanta Hartsfield-Jackson International	ATL	6,070	3,823	-37%
Charlotte Douglas International	CLT	2,794	2,118	-24%
Baltimore/Washington International	BWI	2,535	2,136	-16%
Philadelphia International	PHL	2,417	1,778	-26%
Chicago O'Hare International	ORD	2,414	1,706	-29%

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

2.5. Summary

The COVID-19 pandemic forced nearly all airlines to make unprecedented system capacity cuts across their respective networks. This translated into a decline in schedules among all 20 commercial service airports in Florida. The overall trends found that airports that are domestic-focused and rely more on leisure traffic fared much better from the pandemic. Fortunately, most of Florida's commercial service airports experience high volumes of leisure traffic due to its' world-renowned beaches, amusement parks, and wildlife.

Chapter 3. Airport Forecasts and Recovery

3.1. Introduction

Given the abundance of data provided by airport representatives and industry organizations, it is clear that the impacts of the pandemic on the airline industry have been significant and may be long-lasting. As such, it is likely that the industry will take years to return to pre-pandemic activity levels and a forecast of this resulting recovery period is needed. This forecast analysis considers the responses of airport representatives at Florida's 20 commercial service airports and seven independent aviation industry organizations to develop forecasts of airline passenger traffic levels for the next five years. The forecasting analysis is discussed in the following sections:

- Background
- Historical Context
- Methodology
- Forecast Results
- Recovery
- Summary

It is important to note that the forecasts included in this analysis are for general informational purposes only. These projections were made in good faith and are based on data from a variety of sources but do not necessarily represent the views of the organizations considered in this analysis. Actual results will vary depending of numerous conditions and circumstances that cannot be accurately analyzed at this time.

3.2. Background

In almost any forecasting analysis, background information is needed to provide context and help identify trends among similar data sets. In the context of this analysis, three primary sources of information were considered to provide data and context: (1) studies and reports conducted by several travel and tourism industry organizations, (2) forecasts developed by aviation industry groups, and (3) responses from Florida airport representatives collected during this study's outreach process. The following sections highlight the primary resources considered and utilized during the completion of this forecasting analysis.

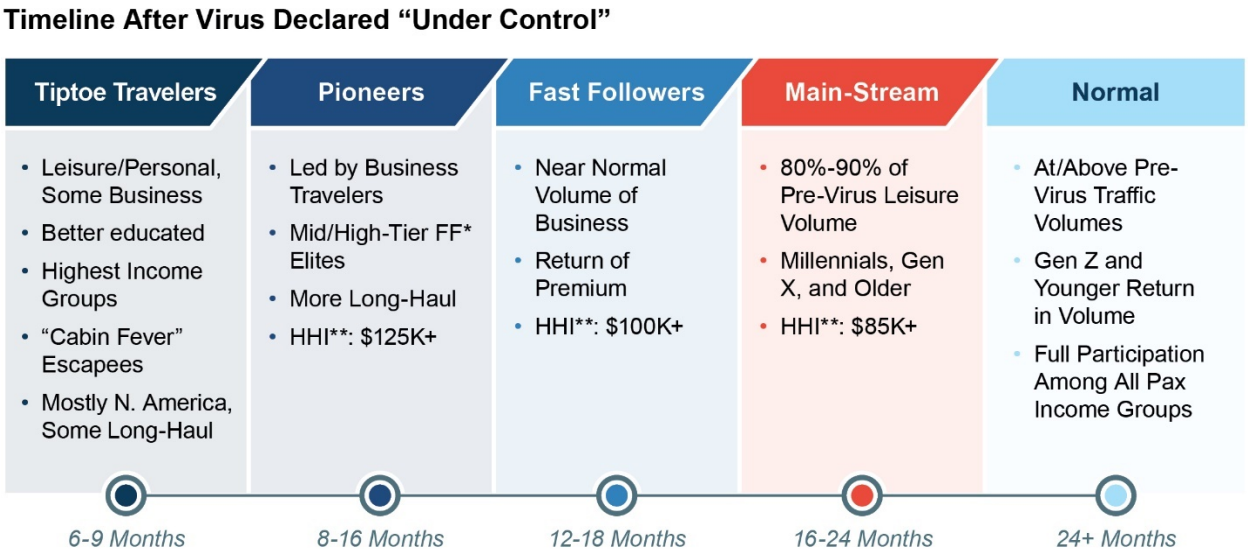
3.2.1. Industry Context

During the initial stages of the pandemic, many organizations, including the project team, believed that post-pandemic industry recovery would follow similar trends as previous industry upsets. However, it soon became clear that the circumstances surrounding the pandemic were unique to any event in the history of aviation (this is discussed further in **Section 3.3: Historical Context**). It was determined that additional research was needed to develop a better understanding of the pandemic's overall impacts and possible paths to recovery. A subset of resources that were considered in this forecasting analysis are detailed below.

Figure 3-1 presents a summary prepared by the Atmospheric Research Group that shows different types of passengers and how long it will take each of these groups to return to flying regularly after the virus is declared 'under control'. As shown, leisure travelers are likely to return first, particularly due to travelers

with ‘cabin fever’ escaping to warmer climates. Additionally, it is estimated that domestic passenger traffic will return faster than international traffic, likely because international travel restrictions will remain in place for the foreseeable future. It should be noted that this timeline will likely depend on the availability of a vaccine, which will be discussed further in **Section 3.4: Methodology**.

Figure 3-1: Atmospheric Research Group Estimated Recovery Timeline Among Passenger Cohorts

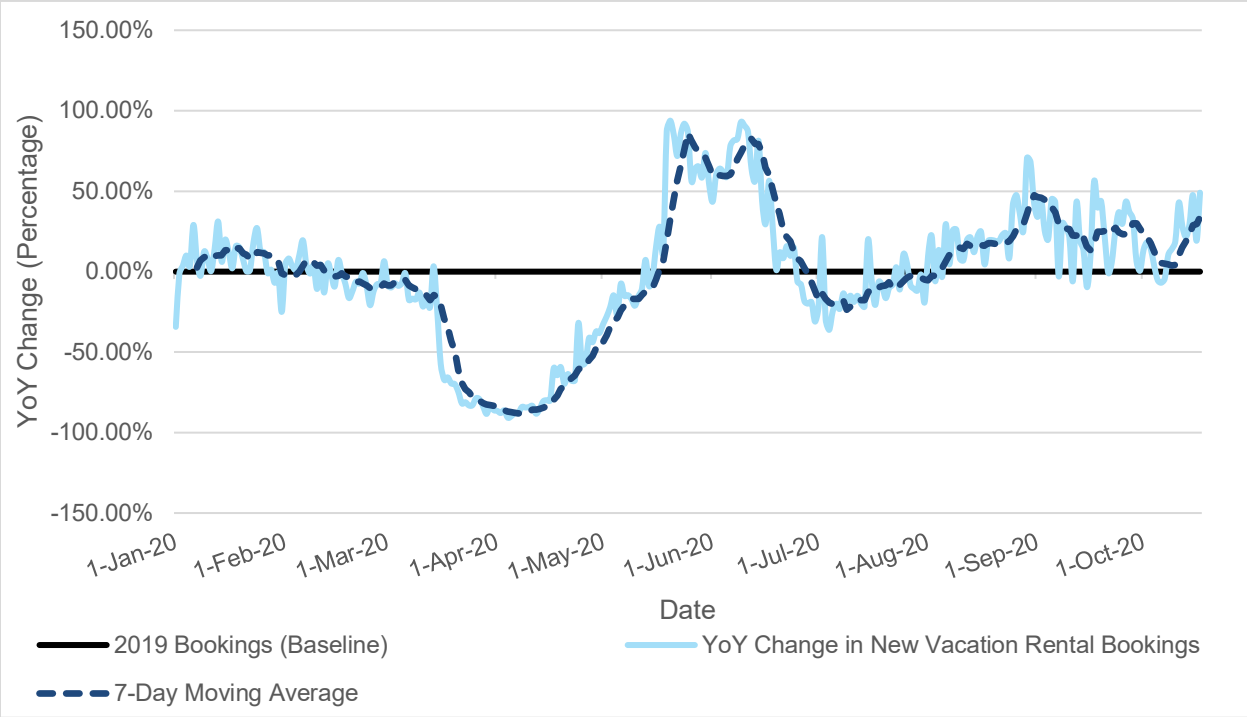


**FF: Frequent Flyer **HHI: Household Income*

Source: Atmospheric Research Group, 2020

Figure 3-2 shows the year-over-year change in vacation rental bookings (websites such as Airbnb and VRBO) in Florida each day between January 1 and October 18, 2020. These data reinforce the hypothesis set forth in the figure above as vacation rental bookings have mostly remained above 2019 levels since July, indicating that leisure travelers are booking trips and traveling to the state. It is important to note that the figure shows the date the bookings were made rather than the planned day of travel. The actual number of visitors staying in vacation rentals likely lags the data by a few weeks or months. However, the data is a positive indication that leisure activity is returning to the state. Based on these data, it is believed that airports with high amounts of leisure traffic will return to pre-pandemic traffic levels faster than the national average.

Figure 3-2: Year-over-Year Change in Florida Vacation Rental Bookings
January 2020 - October 2020



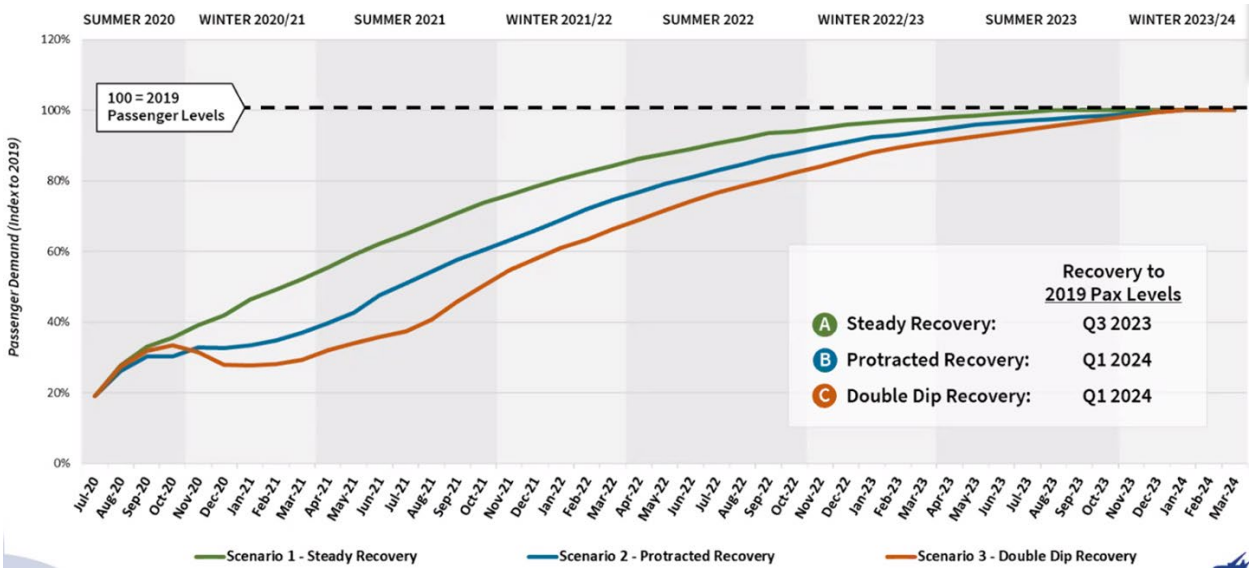
Source: Visit Florida, 2020

3.2.2. Industry Forecasts

Since the beginning of the pandemic, several aviation industry organizations developed recovery scenarios based on data and insight from airports, airlines, and government agencies. However, due to the high volatility of the pandemic, these forecasts have changed dramatically since many were first released as new information became available. Data was gathered from seven aviation industry organizations including the International Civil Aviation Organization (ICAO), the international aviation consulting firms Inter*VISTAS* and ICF, Airlines for America (A4A), the International Air Transport Association (IATA), Boeing, and the Atmospheric Research Group. Each organization developed forecasts based on a variety of metrics including airline seating capacity, airline fleet rationalization, passenger traffic levels, and regional recovery timelines. In the context of this analysis, passenger traffic forecasts and recovery timelines were considered in the development of each airport's forecasted recovery scenario. A selection of forecasts utilized in this analysis is highlighted below.

Figure 3-3 presents the most recent passenger demand forecast developed by Inter*VISTAS.* The forecasts include three separate scenarios for passenger traffic recovery that vary in magnitude based on the reduction of international travel restrictions, COVID-19 infection rates, and the implementation of an effective vaccine. However, all three scenarios agreed that full recovery would take approximately four years.

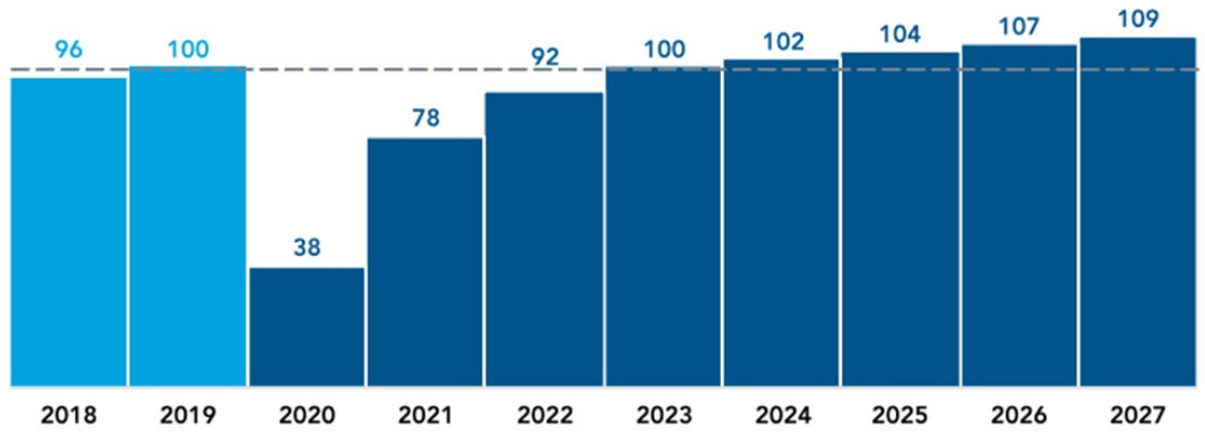
Figure 3-3: Inter*VISTAS* Passenger Demand Recovery Forecast



*Source: Inter*VISTAS*, 2020*

ICF developed a similar forecast that is presented in **Figure 3-4.** The global passenger traffic levels are projected for each year between 2020 and 2027. There is some consensus between the ICF passenger traffic forecast and the *InterVISTAS* passenger demand forecast, as both indicated that airline traffic would return to around 80 percent of 2019 levels by the end of 2021 and the industry would reach full recovery by the end of 2023.

Figure 3-4: ICF Global Passenger Traffic Forecast

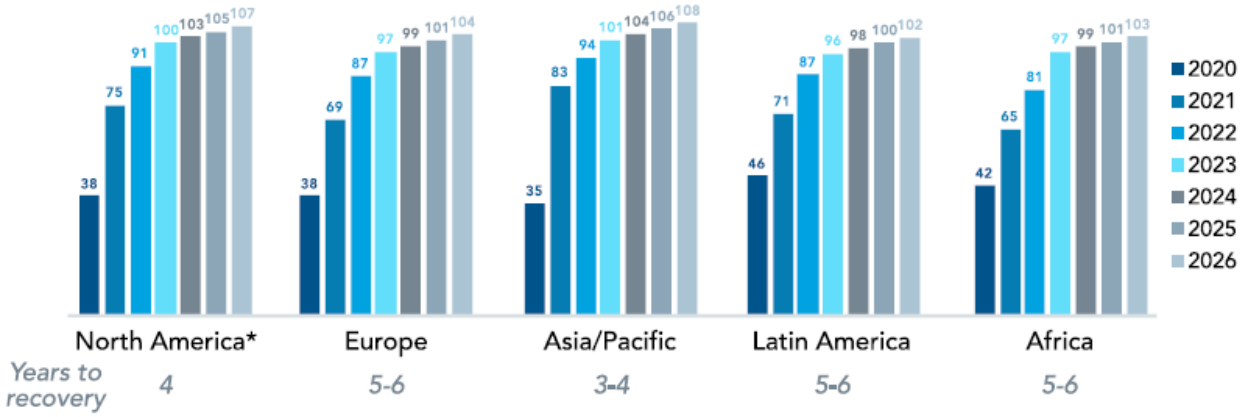


**Note: Traffic levels are indexed based on 2019 passenger traffic*
***Note: forecasts assume the availability of treatment by Q1 of 2021*
Source: ICF, 2020

ICF also conducted an analysis that highlights how different regions around the globe will recover from the pandemic. The resulting forecast is shown in **Figure 3-5** and estimates that the Asian/Pacific and North American airline markets will recover first and other regions around the world may lag behind by

one to two years. Given that a high percentage of international traffic arriving at Florida airports originates from Latin America and Europe, it can be postulated that Florida airports with more international traffic will recover more slowly than the national average.

Figure 3-5: ICF Global Passenger Traffic Forecast by Region



**Note: North America excludes Mexico*
**Note: Traffic levels are indexed based on 2019 passenger traffic*
Source: ICF, 2020

Several other aviation industry resources were researched during the completion of this analysis, however, not all were considered in the development of forecasts for this study. These resources included data from the Federal Aviation Administration's (FAA) Terminal Area Forecast (TAF) and OPSNET database. It was determined that these resources provided historical data and estimates of 2020 traffic but did not provide future projections that were accurate enough to be useful to the development of post-COVID activity forecasts.

3.2.3. Airport Responses

Representatives from each of Florida's 20 commercial service airports were asked to provide information about the impacts of the pandemic and the subsequent results are documented in **Chapter 1: Outreach and Results**. During this outreach process, airport representatives were asked to provide qualitative and quantitative information about their airport's plan for recovery. In total, representatives from 15 airports reported that their airport had developed some form of recovery plan with a forecast component and nine representatives provided multiple types of projections. Among the 15 airports, responses varied significantly, but common metrics were identified, and these were factored into the forecast analysis. These metrics included a projection of passenger traffic at the end of December 2020, a projection of December 2021 passenger traffic, and a projected date for full recovery to 2019 traffic levels. Eleven airport representatives provided estimated passenger traffic levels for December of 2020, three representatives estimated December 2021 passenger traffic levels, and 10 representatives provided the year that their airport was projected to recover to 2019 passenger traffic levels. These airport-provided estimates were used to generate unique traffic growth rates in 2020, 2021, and 2022-2025, which are discussed in further detail in **Section 3.4: Methodology**. The response of each airport representative regarding recovery scenarios is detailed in **Table 3-1**.

Table 3-1: Airport Recovery Scenario Responses

Airport Name	Associated City	FAA ID	Hub Size	Did Your Airport Provide Some Type of Recovery Projection?
Daytona Beach International	Daytona Beach	DAB	Non	Yes
Destin-Fort Walton Beach	Destin/Fort Walton Beach	VPS	Small	Yes
Fort Lauderdale/ Hollywood International	Fort Lauderdale	FLL	Large	Yes
Gainesville Regional	Gainesville	GNV	Non	Yes
Jacksonville International	Jacksonville	JAX	Medium	Yes
Key West International	Key West	EYW	Non	Yes
Melbourne International	Melbourne	MLB	Small	Yes
Miami International	Miami	MIA	Large	Yes
Northwest Florida Beaches International	Panama City	ECP	Small	No
Orlando International	Orlando	MCO	Large	Yes
Orlando Sanford International	Orlando	SFB	Small	Yes
Palm Beach International	West Palm Beach	PBI	Medium	Yes
Pensacola International	Pensacola	PNS	Small	Yes
Punta Gorda	Punta Gorda	PGD	Small	No
Sarasota/Bradenton International	Sarasota/Bradenton	SRQ	Small	Yes
Southwest Florida International	Fort Myers	RSW	Medium	No
St. Pete-Clearwater International	St. Petersburg/ Clearwater	PIE	Small	Yes
Tallahassee International	Tallahassee	TLH	Non	Yes
Tampa International	Tampa	TPA	Large	No
Vero Beach Regional	Vero Beach	VRB	Non	No

Source: COVID-19 Airport Surveys, 2021-2025 FAA NPIAS Report

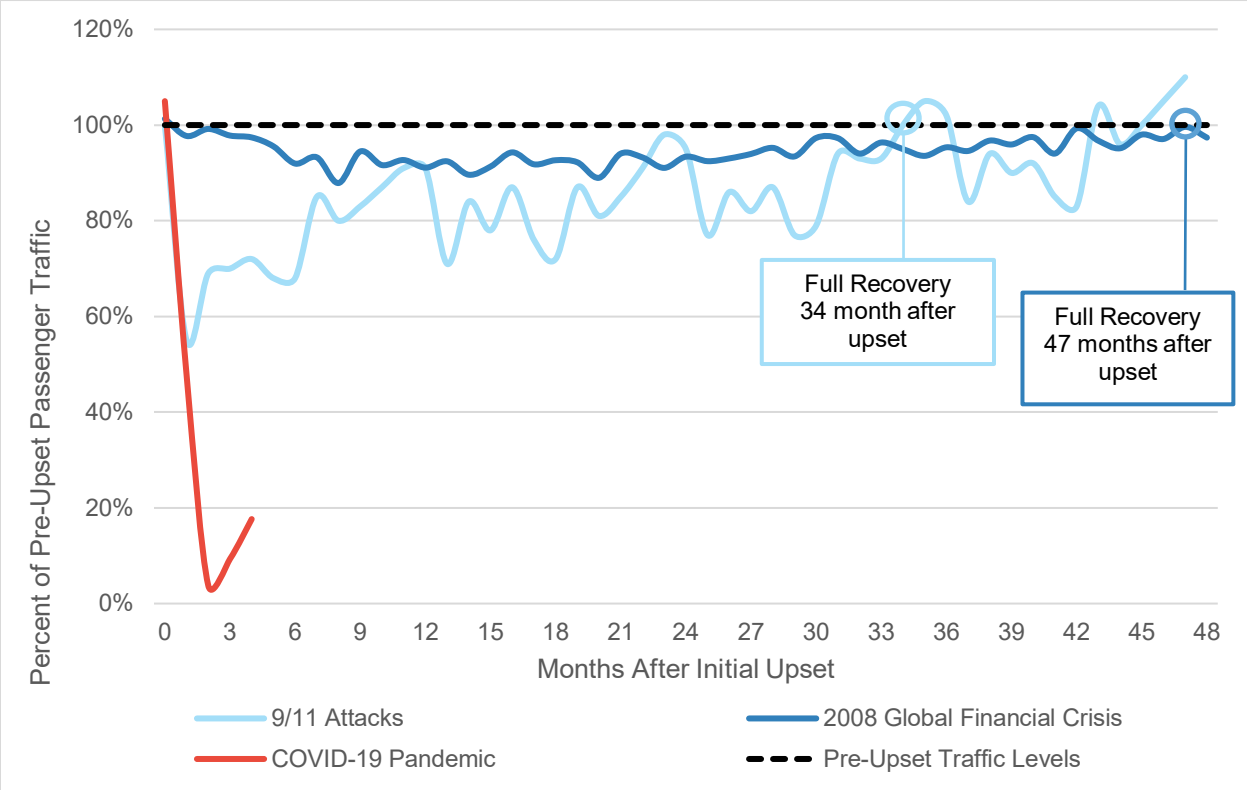
3.3. Historical Context

In the first three months of the pandemic, several industry organizations developed forecasts that were based on historical data from previous economic upsets. Specifically, two events were identified as being

comparable. The first is the time period following the September 11th terrorist attacks (9/11) between 2001 and 2005, while the second was the 2008-2010 Global Financial Crisis. During both events, airline passenger activity declined significantly and slowly recovered over a multi-year period. However, as the pandemic progressed, it quickly became apparent that the pandemic affected the commercial aviation industry far more severely compared to either of the previous two industry upsets.

In the first two months following the start of the pandemic, U.S. airline passenger traffic declined at similar rates to the two months after 9/11. However, in the third and fourth months following the start of the pandemic, passenger traffic continued to decline beyond the lowest traffic levels recorded during the post-9/11 time period. Comparatively, during the Global Financial Crisis passenger traffic levels declined slowly and never dipped below 80 percent of pre-upset traffic, indicating that the initial effects of the crisis were far less dramatic compared to 9/11 or the COVID-19 pandemic. However, it took the airline industry approximately four years to recover to pre-upset traffic levels after each event. Unfortunately, given that passenger traffic declined far beyond levels recorded during either of the past industry upsets, it is unlikely that the pandemic recovery will follow the same shape or timeline as the two previous trends. **Figure 3-6** provides a comparison of U.S. airline passenger traffic levels in the four years following 9/11 and the Global Financial Crisis with the traffic levels in the months following the start of the pandemic.

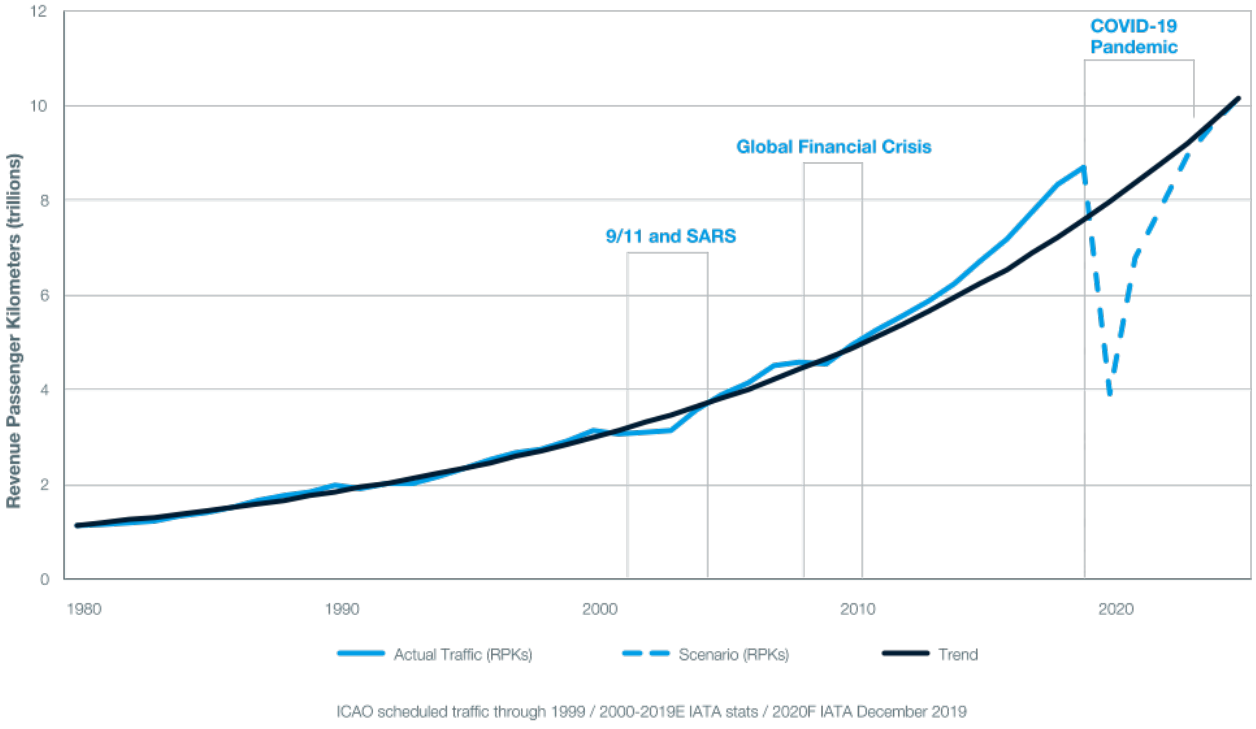
Figure 3-6: Post-Upset U.S. Airline Passenger Traffic Levels
9/11 vs. 2008 Global Financial Crisis vs. COVID-19 Pandemic



Sources: Bureau of Transportation Statistics, 2020; Kimley-Horn, 2020

Boeing also developed an in-depth analysis of the 20-year outlook for the commercial aviation industry that included a historical analysis of passenger traffic and a forecast for the industry in the next 10 years. This analysis is presented in **Figure 3-7** and illustrates the difference between the changes in passenger traffic resulting from the pandemic and the changes after 9/11 and the Global Financial Crisis. The forecast also shows the rapid growth in passenger traffic in the few years prior to the pandemic, which further exacerbated the impacts of the pandemic. Boeing's analysis also projects that industry's recovery from the pandemic will last between four and six years.

Figure 3-7: Global Passenger Traffic Historical Growth and Future Trends



Source: Boeing, 2020

3.4. Methodology

As mentioned previously, this analysis utilized insights from several industry organizations and data reported by representatives at Florida's 20 commercial service airports to develop forecasts for the recovery of passenger traffic back to pre-pandemic levels. This forecast considered each airport's passenger enplanements in 2019 as the baseline that all future traffic growth is based on. However, given the lack of a historic upset that is comparable to the pandemic, growth rates were derived from the end-of-year traffic estimates identified during the research and outreach process. There was significant variation in the airport-reported data as each airport sponsor had developed forecast scenarios unique to their airport. As such, the forecast methodology had to be altered between each airport and between three time periods within the forecasting window. The methodologies utilized for each time period are described below.

3.4.1. Establishing 2020 Baseline

Representatives from 11 of the 20 airports provided mid-year enplanement levels as well as percentage estimates of 2020 annual enplanements as compared to 2019. For these airports, data was extrapolated to determine unknown and future monthly enplanements in Q3 and Q4, creating a consistent growth rate between the last available month of data and the end of the year. **Table 3-2** provides an example of how 2020 monthly enplanements were established at Pensacola International (PNS).

Table 3-2: PNS Forecast Development Example for 2020 Baseline

Month	Traffic Level (% of 2019 Traffic)	Growth Rate	Notes
April	10%	N/A	Airport-reported data
May	21%	11.21%	
June	39%	17.99%	
July	54%	15.17%	
August	**64%**	9.25%	
September	66%	2.75%	Extrapolated - 11% growth over 4 months: 2.75% per month growth
October	69%	2.75%	
November	72%	2.75%	
December	**75%**	2.75%	Airport-reported traffic projection

Source: PNS Monthly Traffic Report, 2020; Kimley-Horn, 2020

Two airports (EYW and PBI) only provided projections for year end 2021 traffic levels. The methodology used to develop forecasts for these airports followed the same steps as the airports that reported 2020 traffic estimates, however, the growth rates were steady for the remainder of 2020 and the entirety of 2021.

Among the remaining nine airports that did not report projections, growth rates were selected based on two primary metrics: hub size and passenger traffic mix at each airport. Several airports in each hub classification reported similar actual traffic levels in May, June, and July; so similar growth rates were applied. If a similar growth rate was not available within the hub classification, the airport's passenger traffic mix was considered to determine if any other airports had a similar traffic composition and the related growth rate. For example, Punta Gorda (PGD) and Northwest Florida Beaches International (ECP) were identified as being popular beach destinations that relied on high levels of leisure travelers flying on ultra-low-cost carriers (ULCCs), and therefore were given similar 2020 traffic growth rates.

The forecasted traffic levels for the remainder of 2020 did not take industry-wide data into significant consideration because the results reported from each airport varied far beyond the bounds of most near-term forecasts. Additionally, given the regional nature of the pandemic, it was deemed imprudent to match the growth rates at Florida airports with nationwide or even global trends. However, these projections for passenger traffic in 2020 were used as a baseline for 2021 forecasts that utilized industry-wide data.

3.4.2. 2021 Forecast

Unlike the 2020 forecasts, data was not available for 2021-2025 which made it impossible to develop forecasts that rely solely on Florida-specific data. Therefore, nationwide trends were considered as a supplemental source to airport reported data in the forecast analysis. As mentioned before, there was consensus that passenger traffic could grow in 2021, but it was agreed that any traffic growth would largely be dependent on the development and public availability of a viable vaccine. As of October 2020, CDC experts estimated that safe, effective and publicly-accepted vaccines will not be widely available until mid-2021.[1] As such, passenger traffic growth will likely be relatively slow throughout 2021, and growth rates were determined for Florida's commercial service airports accordingly.

One airport, Tallahassee International (TLH), provided a projection of 2021 annual passenger traffic in addition to a 2020 projection. As such, the airport was assigned a growth rate in the same fashion as EYW and PBI, however, the growth rate was only applied to 2021 as TLH also provided a year-end 2020 projection. Meanwhile, representatives from St. Pete-Clearwater International (PIE) provided projected growth rates that had been identified during a forecasting analysis conducted by the airport. These growth rates were applied like a traditional aviation activity forecast as opposed to the method used for other airports in this analysis.

The remaining 18 airports were assigned growth rates based on industry forecasts discussed above. Based on Inter*VISTAS* and ICF forecasts, it was projected that domestic airline passenger traffic would increase to approximately 80 percent of 2019 levels by the end of 2021. Growth rates were determined based on projected traffic levels at each airport in December 2020. If an airport's passenger traffic level is projected to be near or above 80 percent in December 2020, then a lower growth rate was assigned. Conversely, airports that are projected to have lower traffic levels at the end of 2020 were assigned relatively higher growth rates. However, given the uncertainty surrounding the availability of a vaccine, assigned growth rates did not exceed two percent per month to reflect limited traffic growth. Additionally, the recovery of international traffic is expected to lag behind domestic traffic, so large hub airports that have a large share of international traffic were assigned lower growth rates and do not meet the year-end 2021 and year-end 2022 projection noted above. Once again, the projections of end of year traffic levels were used as the baseline for 2022-2025 recovery forecasts.

3.4.3. 2022-2025 Forecast

None of the 20 airports projected specific passenger levels in the years following 2021. Given this, all passenger traffic growth rates were developed from the projections of global industry organizations. These projections estimated that traffic would increase to roughly 92 percent of 2019 levels by the end of 2022 and would make full recovery by the start of 2024. However, 10 airports reported projected recovery dates. In these instances, the growth rate was adjusted slightly from the industry trend to reach full recovery by the date reported by each airport representative. As nearly all airports are projected to

[1] Langmaid, V. (October 2020). "'Safe and Effective' COVID-19 Vaccine May be Widely Available by April 2021, Fauci Says". Available Online at: https://www.cnn.com/world/live-news/coronavirus-pandemic-10-14-20-intl/h_ba3700cd260f54f195e2618736f9fa14 (Accessed October 2020).

recover to 2019 passenger traffic levels within four years, the forecasts developed in this analysis extends through December 2024.

As mentioned in **Section 3.2.1**, different segments of passenger traffic will recover at varying rates, meaning that some airports may return to pre-pandemic traffic levels faster than others due to a differences in passenger traffic mixes at each airport. These analyses noted that certain regions around the globe will likely recover at different times due to the variety in passengers traveling to each region. As such, international traffic is projected to recover more slowly compared to domestic air traffic. To account for this, the forecasts for the four large hub airports in Florida were extended through 2025, an additional year beyond the forecasts developed for other airports. The methodology utilized to determine growth rates between 2024 and 2025 was the same as was used in 2022 and 2023.

3.5. Forecast Results

The following analysis documents the projected airline passenger traffic levels in Florida between 2020 and 2025, as appropriate. It is important to note that the recovery scenarios in the following figures are presented in terms of actual passenger enplanements. Variations in passenger traffic levels exist due to the cyclical nature of airline traffic that is present at many airports, and although the number of passenger enplanements may decrease month-to-month, the scenario represents steady year-over-year growth. Trendlines have been included in each forecast to illustrate the 12-month moving average in passenger traffic levels, which shows steady growth during the forecasting window. Therefore, airports are considered to have fully recovered to pre-pandemic levels when the 12-month moving average (trendline) reaches the average 2019 monthly traffic level.

3.5.1. Individual Airport Recovery Forecasts

The pandemic affected different Florida regions in differing ways both medically and economically. As a result, each airport in Florida has experienced different impacts and will likely recover in their own unique fashion. Because of this, it was determined that a forecast would be developed for each airport. The following analysis presents the forecasts for each airport as categorized by FDOT district.

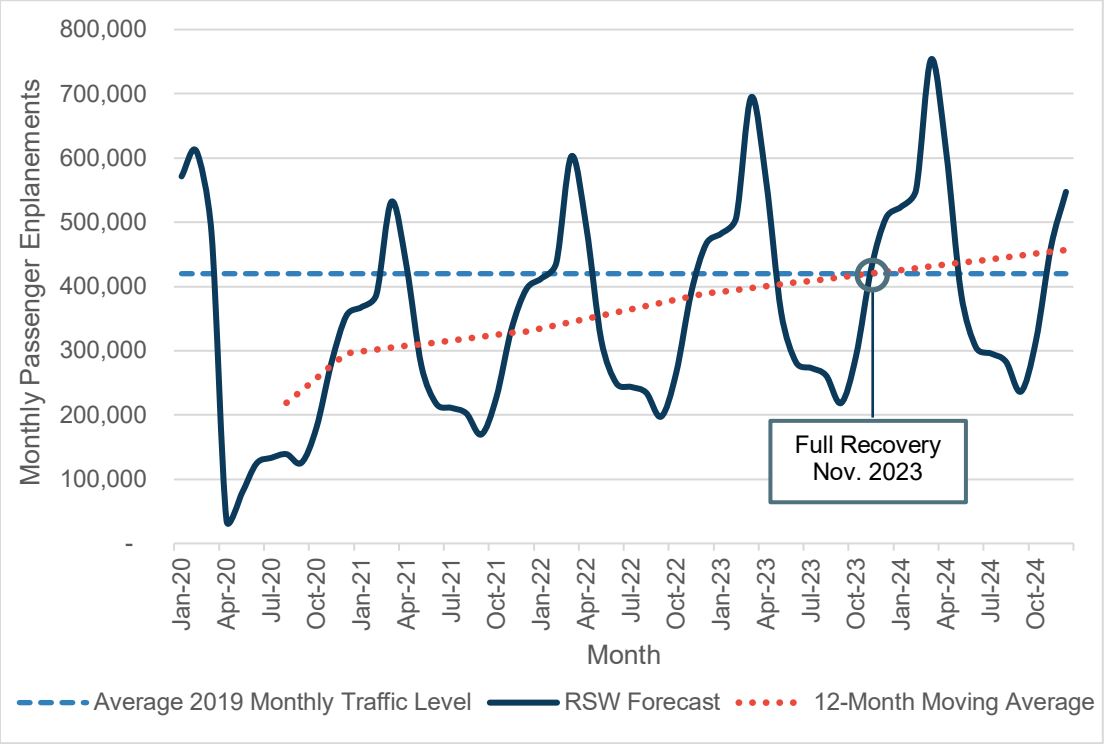
3.5.1.1. District 1

This analysis presents the forecast for the three airports in District 1: Southwest Florida International (RSW), Punta Gorda (PGD), and Sarasota Bradenton (SRQ).

Southwest Florida International (RSW)

RSW is a popular leisure destination airport that experiences significant changes in passenger traffic between seasons and receives most of its traffic in the springtime. As a result, the pandemic began impacting passenger traffic during the airport's peak season, creating a large decline relative to 2019 traffic levels. However, given the high levels of leisure traffic, it is likely that passengers will return more quickly and RSW will recover to 2019 traffic levels by late 2023. **Figure 3-8** presents the projected number of monthly enplanements at RSW between 2020 and 2024, as well as the 12-month moving average of enplanement levels during this time period compared to the average monthly traffic level recorded at RSW in 2019.

Figure 3-8: RSW Monthly Passenger Enplanements Forecast, 2020-2024

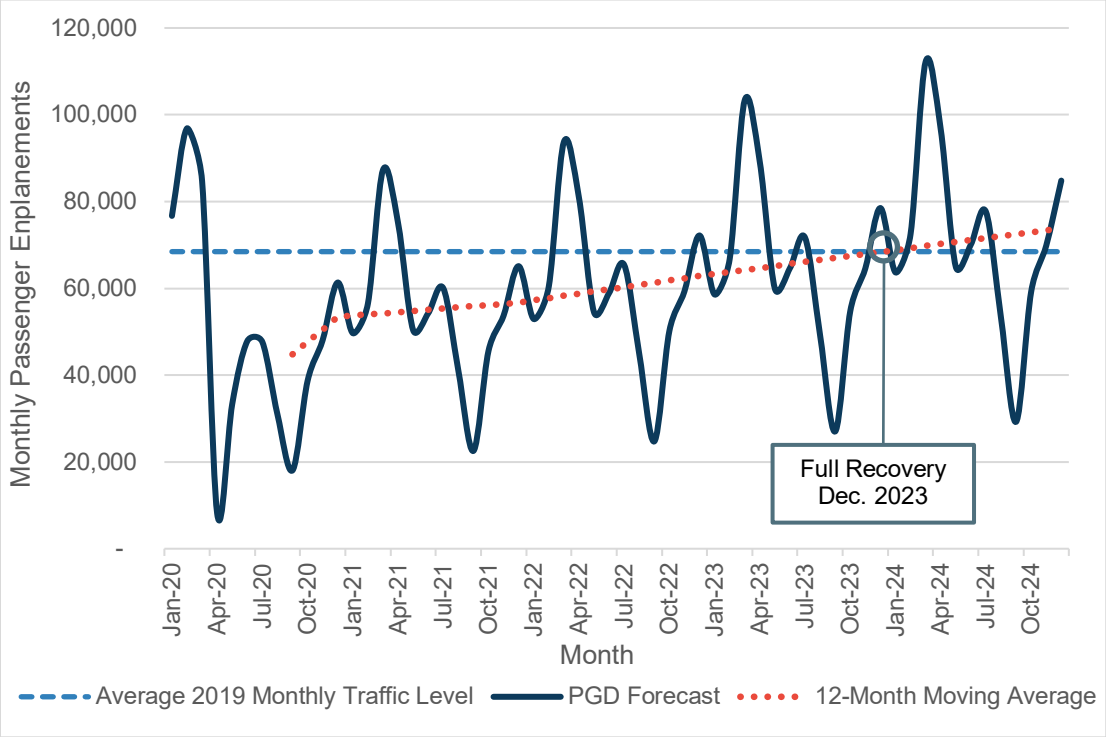


Sources: RSW Airport Monthly Traffic Report, 2020; Kimley-Horn, 2020

Punta Gorda (PGD)

PGD is another popular beach destination that receives higher levels of traffic during the spring break period. **Figure 3-9** illustrates the forecasted monthly passenger traffic levels between 2020 and 2024 compared to the average monthly traffic level in 2019. Once again, due to the leisure popularity of Punta Gorda, the airport is expected to recover by the end of 2023.

Figure 3-9: PGD Monthly Passenger Enplanements Forecast, 2020-2024

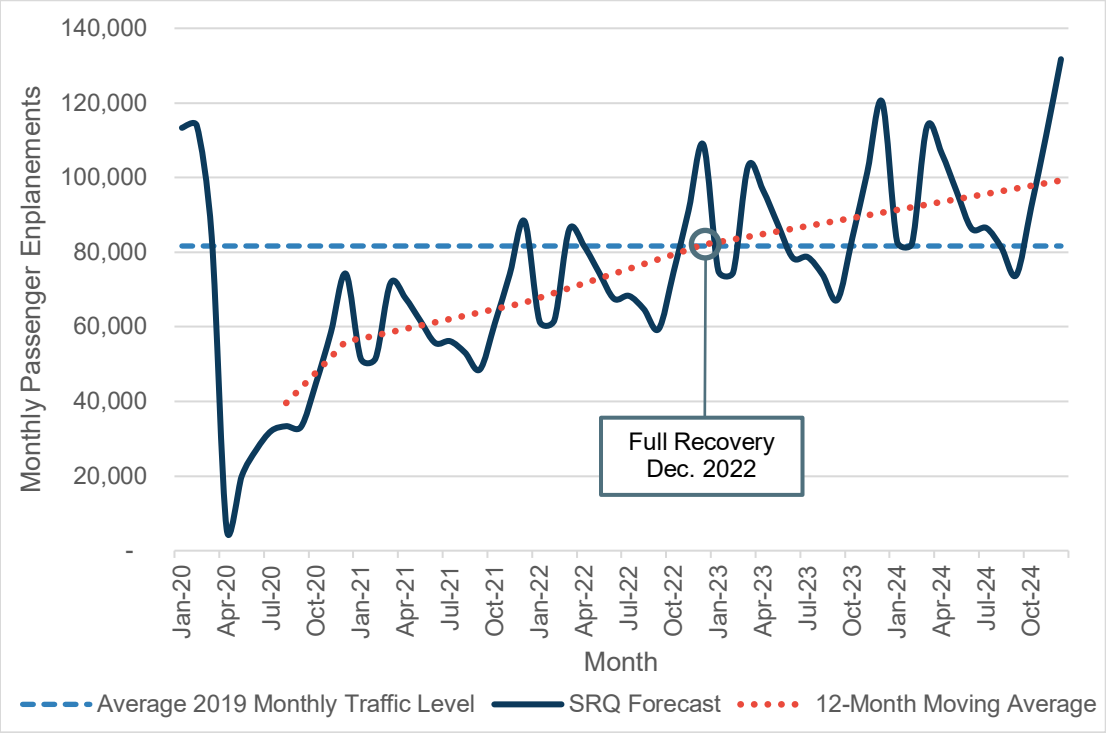


Sources: PGD Airport Monthly Traffic Report, 2020; Kimley-Horn, 2020

Sarasota Bradenton International (SRQ)

Similar to other District 1 airports, SRQ is a popular beach destination airport that receives a large number of passengers traveling on ULCCs. The airport is projected to recover to approximately 70 percent of the previous year's traffic by the end of 2020 and is forecast to recover fully by the end of 2022. This is the fastest forecasted recovery of any of the airports included in this analysis, likely due to the popularity of leisure travel and tourism in the region. **Figure 3-10** presents the forecasted monthly passenger enplanements at SRQ between 2020 and 2024 compared to average 2019 levels.

Figure 3-10: SRQ Monthly Passenger Enplanements Forecast, 2020-2024



Sources: SRQ Airport Monthly Traffic Report, 2020; Kimley-Horn, 2020

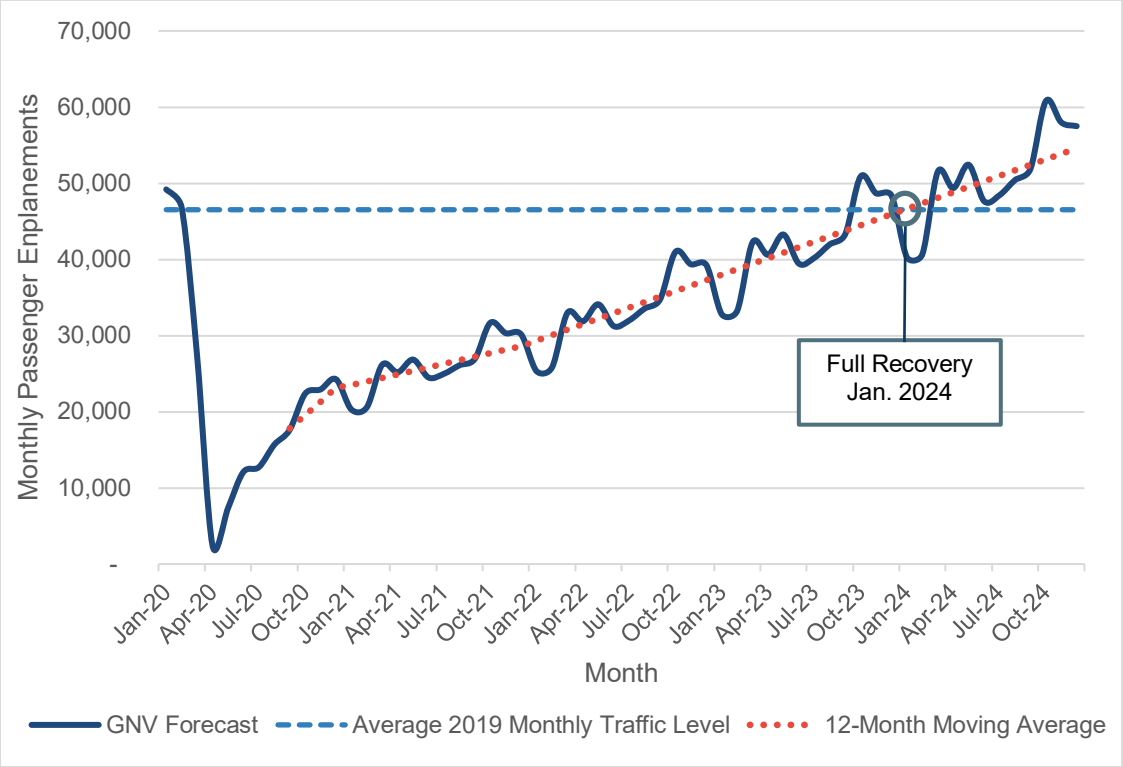
3.5.1.2. District 2

This analysis presents the forecast for the two airports in District 2: Gainesville Regional (GNV) and Jacksonville International (JAX).

Gainesville Regional (GNV)

Gainesville is home to the University of Florida and several large businesses' headquarters, but the region has relatively little tourism. As such, GNV primarily receives business traffic and does not experience dramatic fluctuations in traffic levels during different times of the year. Unfortunately, the lack of leisure traffic at GNV will likely cause the airport to recover more slowly compared to the airport's counterparts at beach destinations around the state. **Figure 3-11** presents the forecasted monthly enplanement levels at GNV between 2020 and 2024 compared to average monthly 2019 passenger traffic levels. As shown, it is projected that GNV will not return to 2019 traffic levels until early 2024.

Figure 3-11: GNV Monthly Passenger Enplanements Forecast, 2020-2024

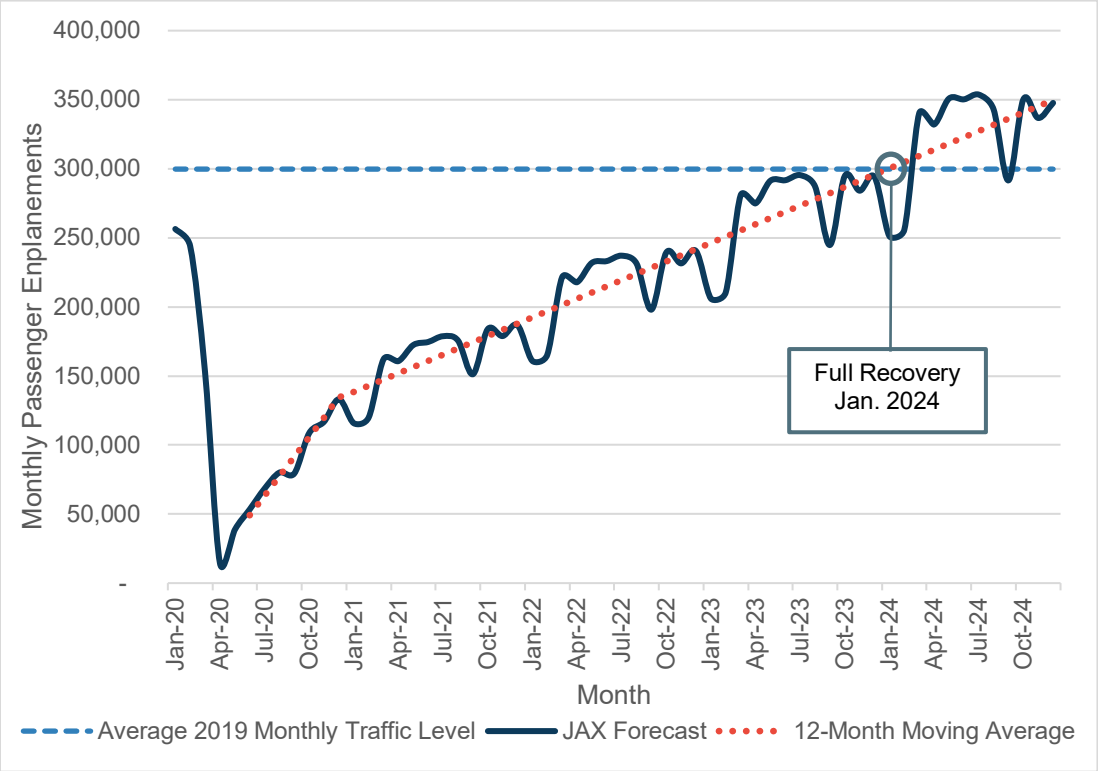


Sources: GNV Airport Monthly Traffic Report, 2020; Kimley-Horn, 2020

Jacksonville International (JAX)

JAX serves as the primary gateway for international and domestic airline passengers traveling to northeast Florida. JAX receives a diverse mix of business, leisure and military traffic throughout the year and does not experience large variations in traffic levels between seasons. This diversity benefits JAX as it may receive an initial boost from returning leisure traffic before business travel recovers fully. This results in JAX being projected to recover by January 2024, which is similar to projections for GNV. **Figure 3-12** presents the forecasted monthly passenger enplanements at JAX compared to average monthly 2019 passenger traffic levels.

Figure 3-12: JAX Monthly Passenger Enplanements Forecast, 2020-2024



Sources: JAX Airport Monthly Traffic Report, 2020; Kimley-Horn, 2020

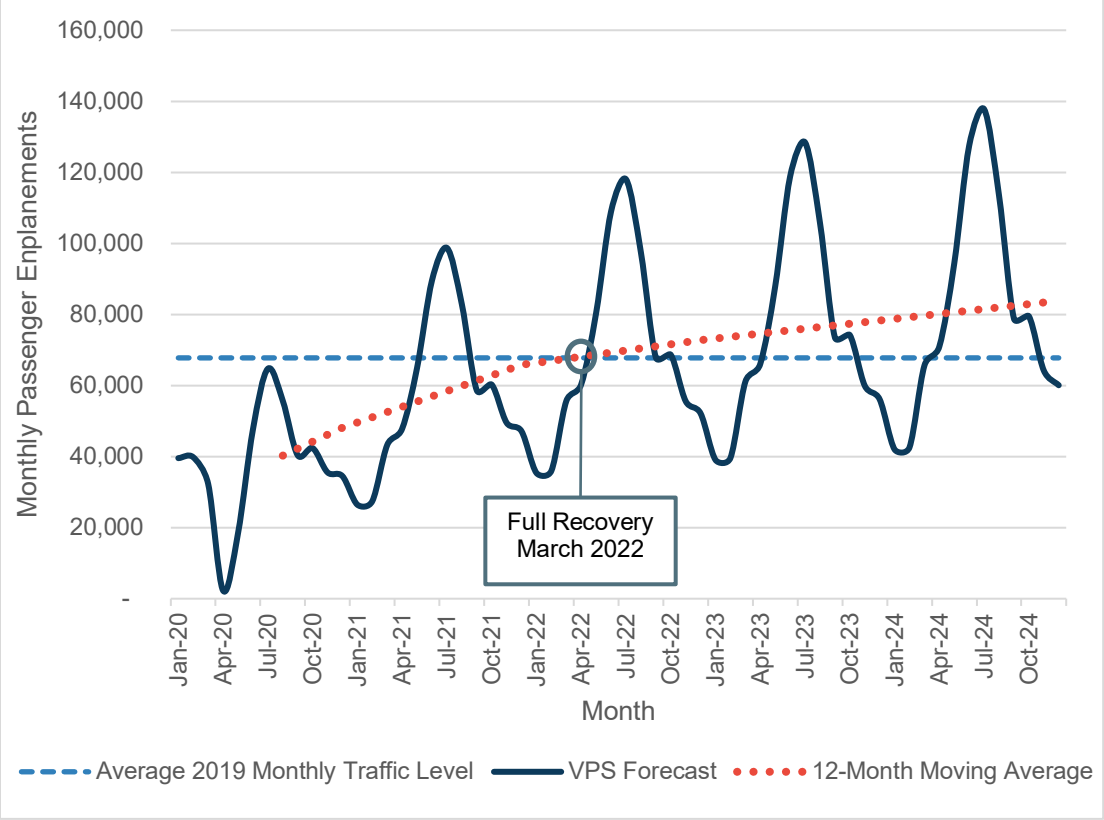
3.5.1.3. District 3

This analysis presents the forecast for the four airports in District 3: Destin-Fort Walton Beach (VPS), Northwest Florida Beaches International (ECP), Pensacola International (PNS), and Tallahassee International (TLH).

Destin-Fort Walton Beach International (VPS)

VPS is located near several popular beach destinations and large military installations in Northwest Florida. As such, VPS receives high levels of leisure traffic during the summertime and steady levels of business traffic, throughout the year. The presence of leisure traffic results in large differences between summertime passenger traffic levels and fall or winter traffic levels. Because of this, passenger enplanements may exceed average 2019 traffic levels as early as March 2021, but full recovery is not projected until March 2022. This is the earliest projected recovery of any airport, likely due to the military traffic that has largely remained constant throughout the pandemic. **Figure 3-13** presents the comparison of projected monthly passenger enplanements from 2020-2024 and average monthly 2019 passenger traffic levels at VPS.

Figure 3-13: VPS Monthly Passenger Enplanements Forecast, 2020-2024

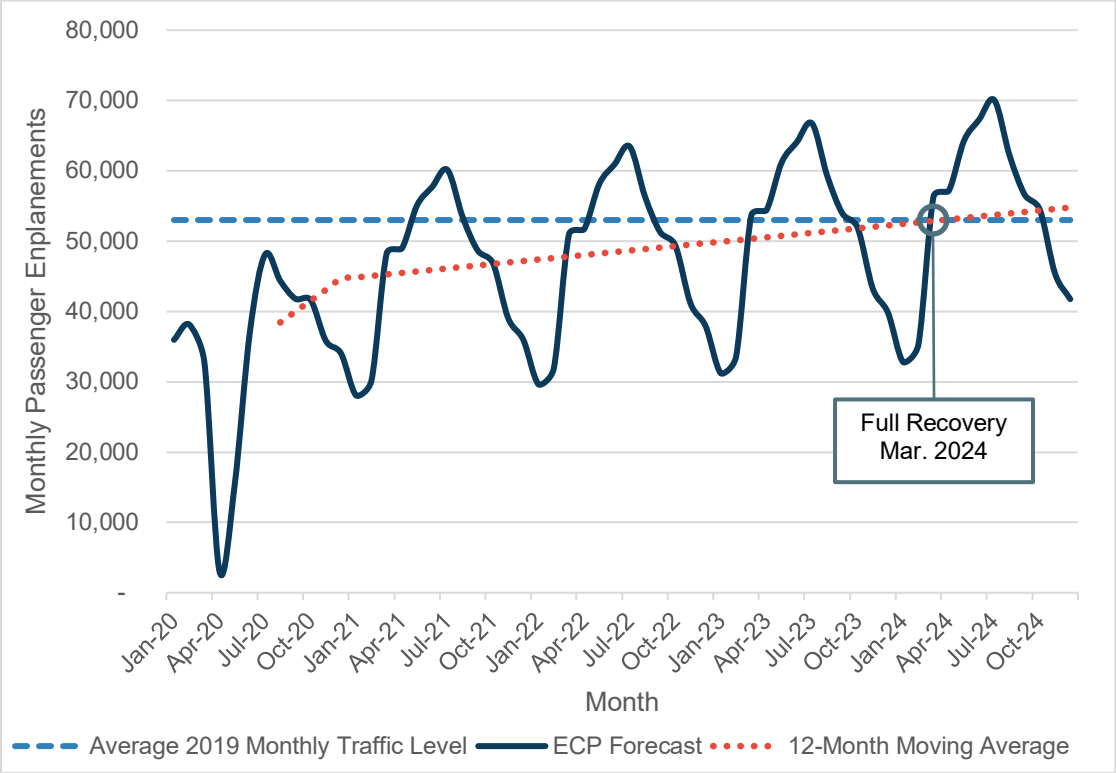


Sources: VPS Airport Monthly Traffic Report, 2020; Kimley-Horn, 2020

Northwest Florida Beaches International (ECP)

ECP is a popular leisure airport that receives most of its passenger traffic from ULCC airlines. This results in dramatic variations in passenger traffic between the peak summer travel season and the winter off season. Given the high percentage of leisure traffic, it is likely that ECP will rebound to approximately 80 percent of normal by the end of 2020 but then will experience limited growth as the remaining wary leisure passengers slowly return to flying, eventually recovering in early 2024. **Figure 3-14** presents the forecasted monthly passenger enplanements at ECP between 2020 and 2024 compared to average monthly 2019 passenger traffic levels.

Figure 3-14: ECP Monthly Passenger Enplanements Forecast, 2020-2024

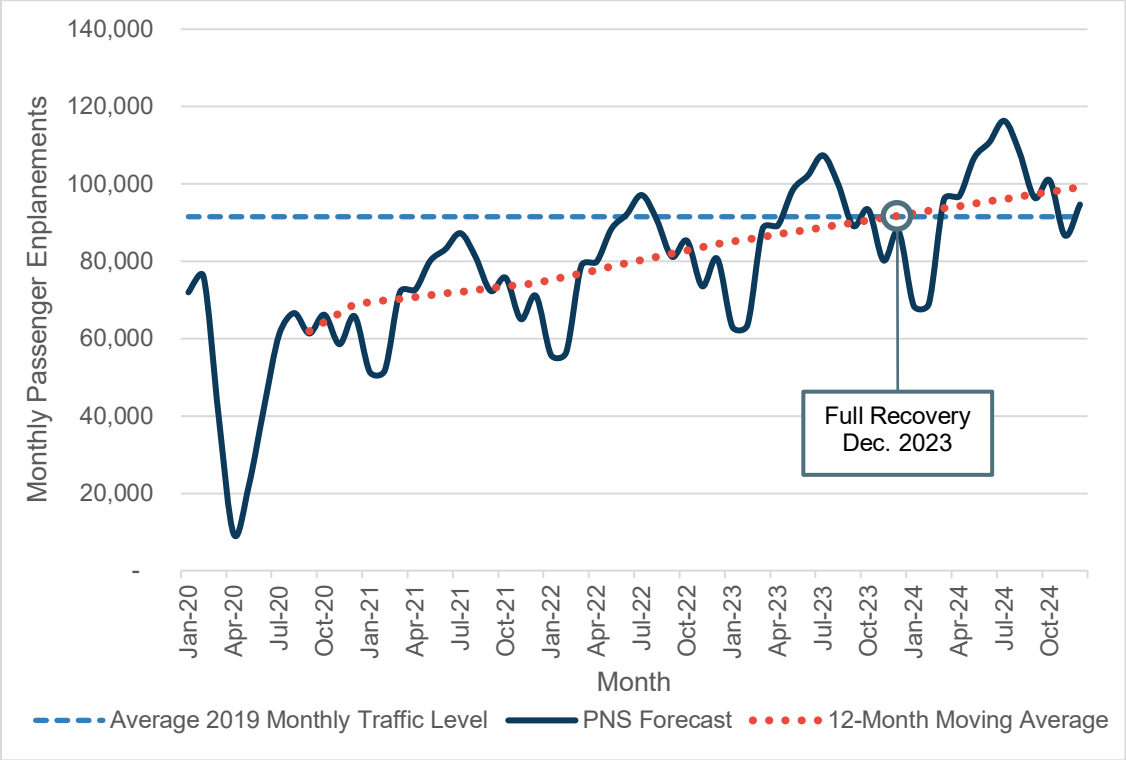


Sources: ECP Airport Monthly Traffic Report, 2020; Kimley-Horn, 2020

Pensacola International (PNS)

Pensacola is a leisure, business, and military destination that receives a moderately diverse mix of passenger traffic. Given this, there are variations in traffic levels throughout the year, but the changes are much less pronounced than other leisure airports. The diverse mix of traffic means that PNS will likely follow industry wide trends during its recovery period, resulting in full recovery in late 2023. **Figure 3-15** illustrates the forecasted monthly passenger enplanement levels at PNS from 2020-2024 and compares these trends to the average 2019 passenger traffic levels at the airport.

Figure 3-15: PNS Monthly Passenger Enplanements Forecast, 2020-2024

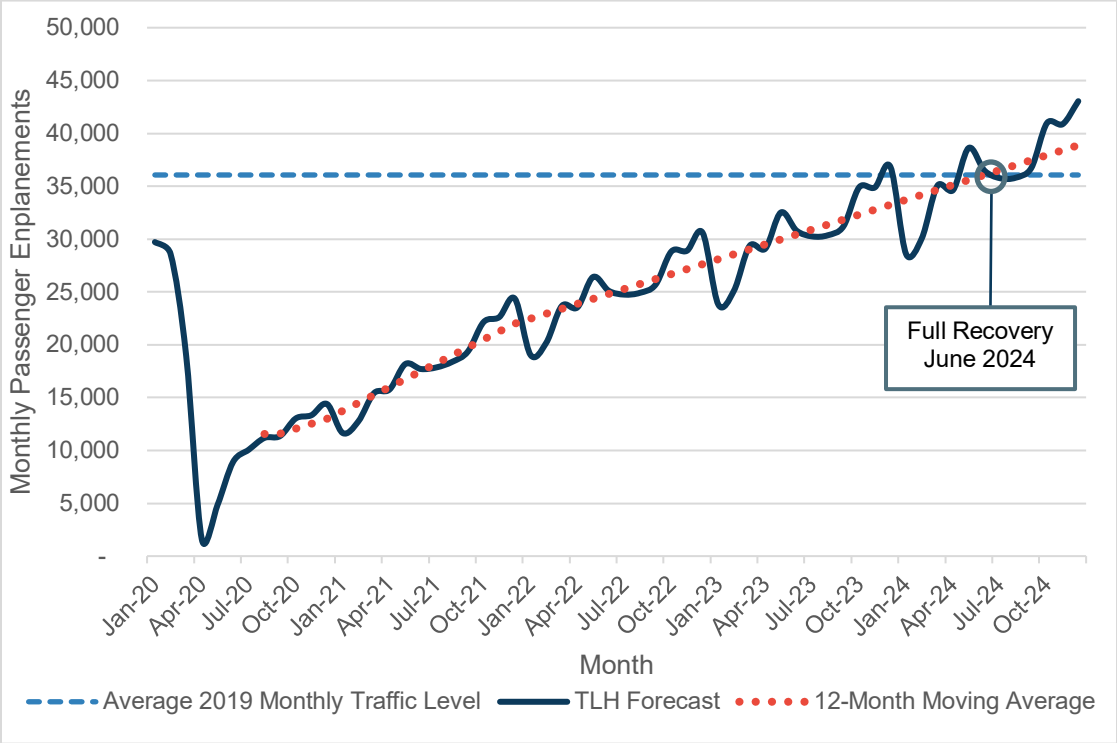


Sources: PNS Airport Monthly Traffic Report, 2020; Kimley-Horn, 2020

Tallahassee International (TLH)

As Tallahassee is the state capital and is not located near any major tourist destinations, TLH primarily receives passenger traffic from visitors doing business or visiting one of many universities in the area. Given this, enplanement levels remain relatively steady throughout the year. However, the lack of leisure attractions in the area may cause TLH to recover more slowly as business travelers remain wary of in-person contact. As such, TLH is not forecasted to recover fully until mid-2024. The monthly forecasted enplanement levels at TLH between 2020 and 2024 are illustrated in **Figure 3-16** as well a comparison of average forecast traffic levels and actual 2019 traffic.

Figure 3-16: TLH Monthly Passenger Enplanements Forecast, 2020-2024



Sources: TLH Airport Monthly Traffic Report, 2020; Kimley-Horn, 2020

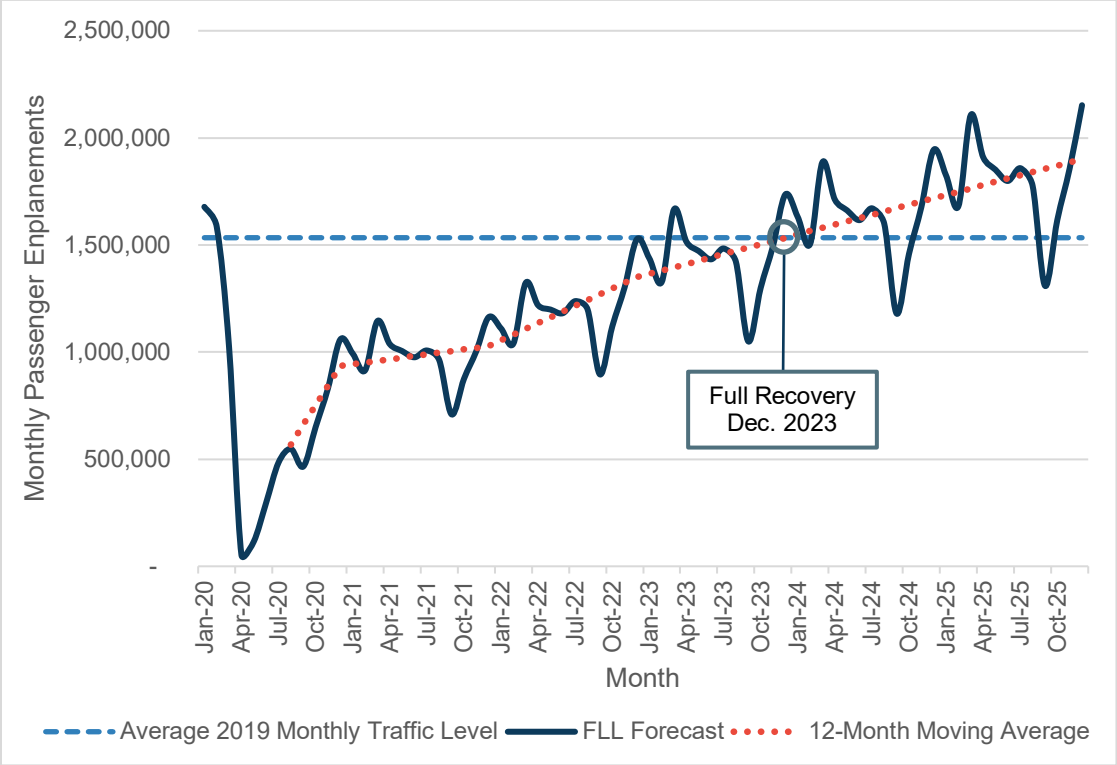
3.5.1.4. District 4

This analysis presents the forecast for the three airports in District 4: Fort Lauderdale/Hollywood International (FLL), Palm Beach International (PBI), and Vero Beach Regional (VRB).

Fort Lauderdale/Hollywood International (FLL)

Although FLL is a large hub airport, the airport technically acts as the secondary airport for south Florida and primarily serves domestic traffic. Approximately 78 percent of airline traffic at FLL is domestic airlines and ULCCs that bring leisure travelers to the region. This will likely result in traffic levels at FLL recovering quickly despite the level of international traffic present at the airport. **Figure 3-17** presents the projected monthly passenger enplanements at FLL between 2020 and 2025 compared to monthly average monthly 2019 passenger traffic levels at the airport. As shown, passenger traffic is projected to return to 2019 levels by the end of 2023, more than a year before other large hub airports.

Figure 3-17: FLL Monthly Passenger Enplanements Forecast, 2020-2025

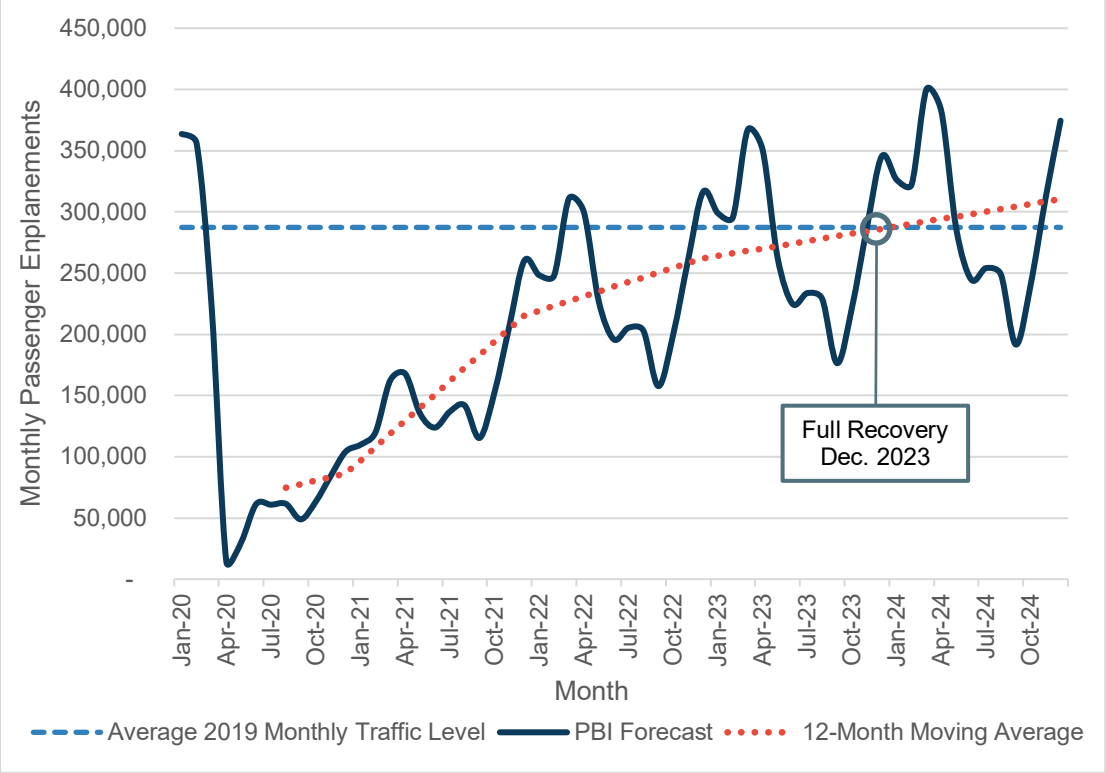


Sources: FLL Airport Monthly Traffic Report, 2020; Kimley-Horn, 2020

Palm Beach International Airport (PBI)

PBI is another popular leisure destination that receives higher traffic levels in the peak spring break season and fewer passengers in the late summer and fall. This leisure traffic is projected to result in a rapid rebound to approximately 75 percent of 2019 traffic levels by the end of 2021. Passenger traffic levels are forecast to continue to grow steadily in 2022 before the airport fully recovers at the end of 2023, similar to other beach destination airports in the state. **Figure 3-18** presents the forecasted monthly passenger enplanements at PBI between 2020 and 2024 compared to average monthly 2019 traffic levels.

Figure 3-18: PBI Monthly Passenger Enplanements Forecast, 2020-2024

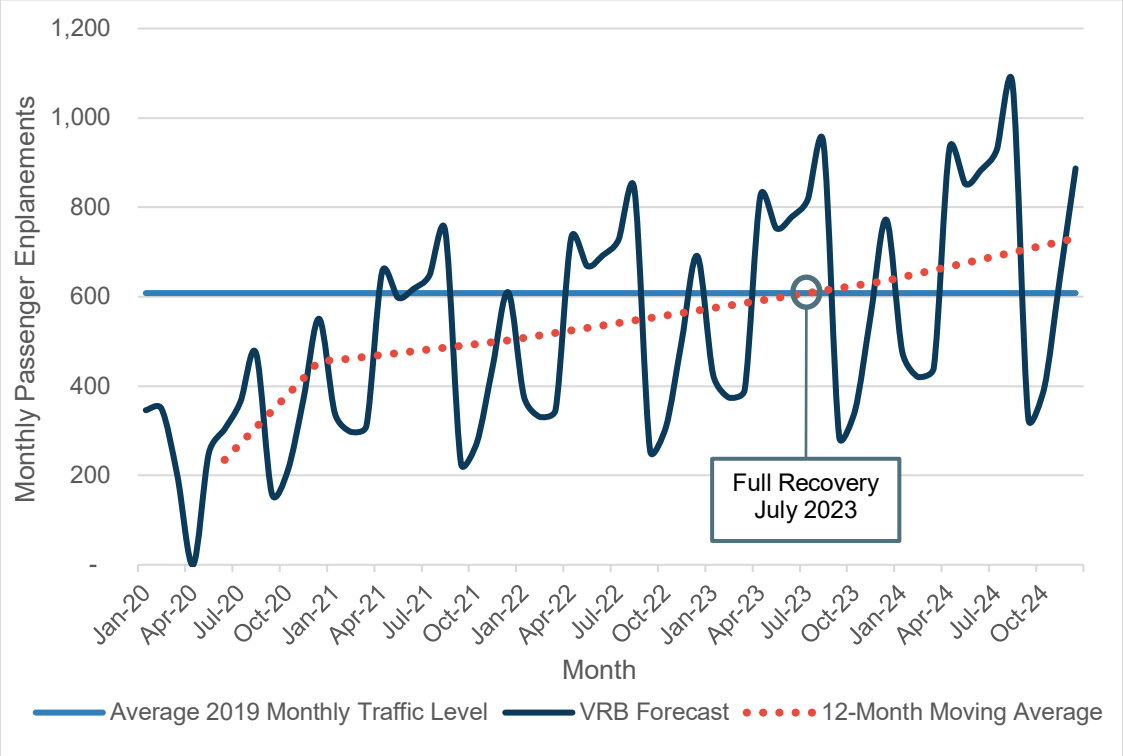


Sources: PBI Airport Monthly Traffic Report, 2020; Kimley-Horn, 2020

Vero Beach Regional (VRB)

VRB is a small leisure destination airport that receives airline service from only a handful of destinations around the country. Given this, small changes to air service and passenger loads at VRB creates relatively large year-over-year changes in traffic levels, making it difficult to accurately project traffic levels for any specific month. Additionally, full year passenger enplanement data for VRB was not available for 2019, so monthly passenger traffic levels had to be estimated using 2019 calendar year data from the FAA's Air Carrier Activity Information System (ACAIS). This eliminated the seasonality of airline traffic at the airport and skewed the data downwards. However, the airport is still projected to recover to 2019 traffic levels by mid-2024, which is similar to other small leisure airports. **Figure 3-19** presents the forecasted monthly passenger enplanements at VRB between 2020 and 2024 compared to average monthly 2019 passenger traffic levels.

Figure 3-19: VRB Monthly Passenger Enplanements Forecast, 2020-2024



Sources: VRB Airport Monthly Traffic Report, 2020; FAA ACAIS Report, 2020; Kimley-Horn, 2020

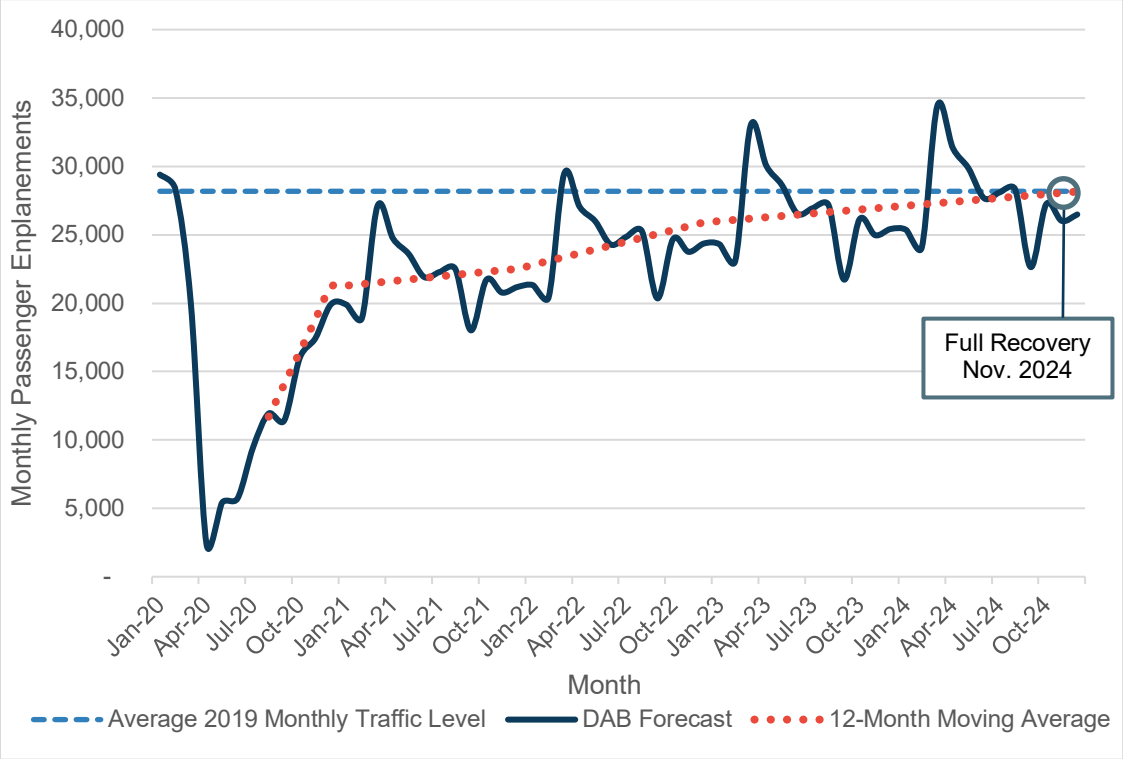
3.5.1.5. District 5

This analysis presents the forecast for the four airports in District 5: Daytona Beach International (DAB), Melbourne International (MLB), Orlando International (MCO), and Orlando Sanford International (SFB).

Daytona Beach International Airport (DAB)

Daytona Beach is a popular destination for beach visitors and auto racing fans. However, DAB also receives a considerable amount of business traffic because of the airport's proximity to educational institutions and large business facilities. Given this, DAB does experience seasonal differences in passenger traffic levels, but the variations are less pronounced than other leisure destinations. Unfortunately, monthly passenger traffic data was not available for all of 2019, so data was collected from the FAA ACAIS database. This caused the effects of seasonality to lessen and skewed the average traffic monthly levels at the airport. Representatives from DAB indicated that the airport would return to pre-pandemic traffic levels by late 2024, which is slightly later than other leisure airports. However, this is likely due to the higher concentration of business traffic at the airport. **Figure 3-20** illustrates the forecasted monthly passenger enplanement levels at DAB from 2020-2024 and compares these trends to the average 2019 passenger traffic levels at the airport.

Figure 3-20: DAB Monthly Passenger Enplanements Forecast, 2020-2024

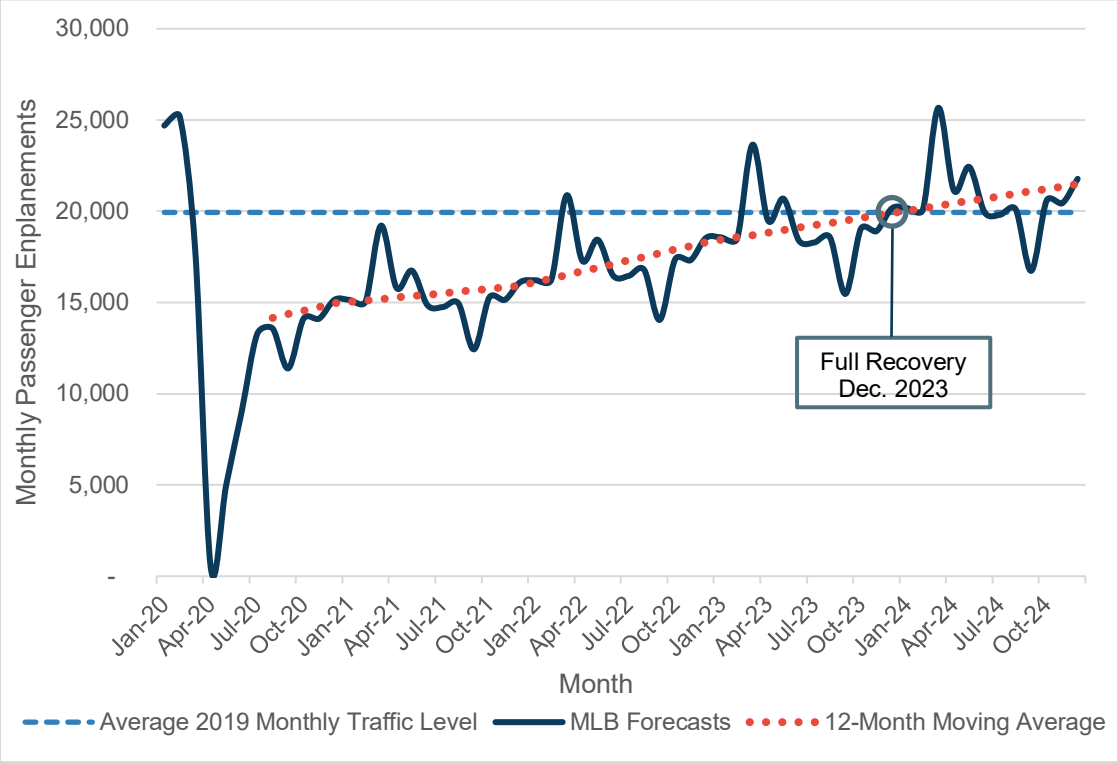


Sources: DAB Airport Monthly Traffic Report, 2020; FAA ACAIS Report, 2020; Kimley-Horn, 2020

Melbourne International (MLB)

MLB is another popular beach destination airport that is served almost exclusively by regional airlines and ULCCs. Similar to other airports, monthly passenger traffic data was not available for all of 2019, so data for MLB was collected from the FAA ACAIS. However, the airport reported the total number of enplanements at MLB through July 2019. Given this, traffic levels were determined for the months from January to July based on airport-reported data and the remaining months were based on ACAIS data. The resulting forecast does show a limited amount of traffic seasonality but does not accurately represent the actual number of enplanements that are projected to occur at MLB during the forecasting window. Regardless of the estimated traffic numbers, MLB is projected to recover to 2019 traffic levels by December 2023. **Figure 3-21** presents the projected levels of monthly passenger enplanements at MLB between 2020 and 2024 compared to average monthly 2019 passenger traffic levels.

Figure 3-21: MLB Monthly Passenger Enplanements Forecast, 2020-2024

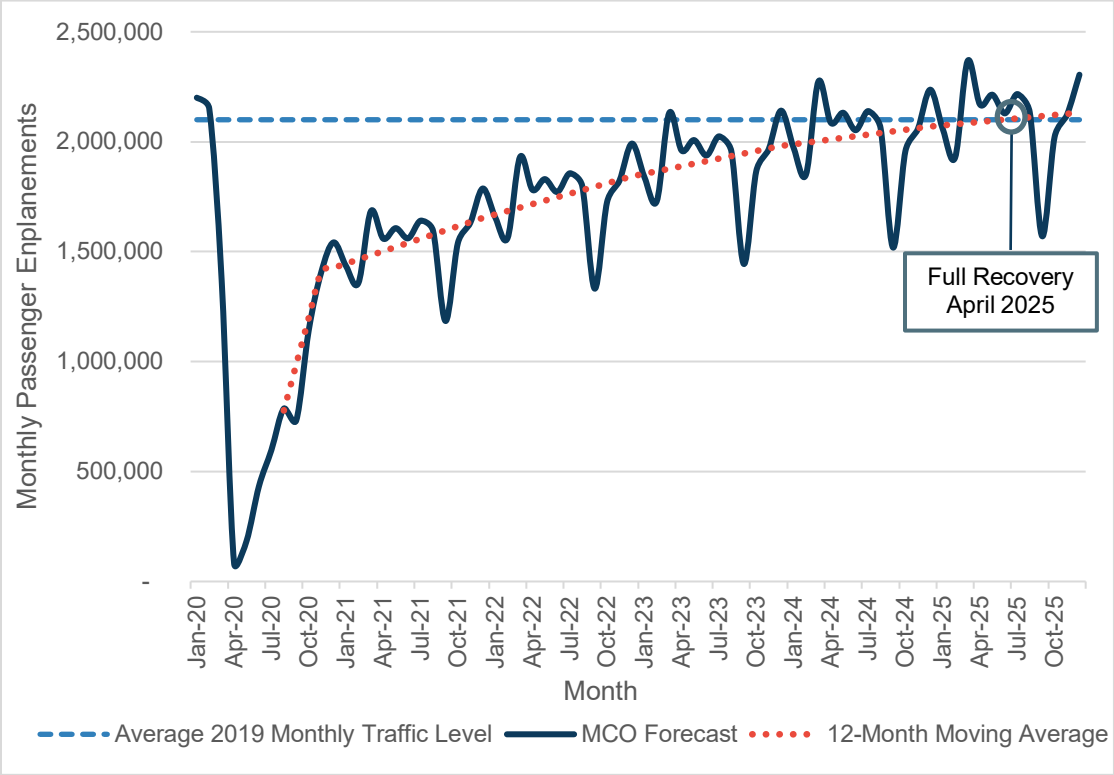


Sources: MLB Airport Monthly Traffic Report, 2020; FAA ACAIS Report, 2020; Kimley-Horn, 2020

Orlando International (MCO)

MCO is the busiest airport in the state and receives a large amount of leisure and business travelers visiting one of many tourist attractions and businesses in the Orlando area. The diverse mix of traffic means that MCO receives relatively consistent traffic levels during all times of the year. Unfortunately, this mix of traffic includes a large share of international airline service that is projected to recover more slowly than domestic operations. Therefore, passenger traffic at MCO is not expected to recover fully until mid-2025. **Figure 3-22** presents the forecasted number of monthly passenger enplanements at MCO between 2020 and 2025 and compares them to average monthly 2019 passenger traffic levels.

Figure 3-22: MCO Monthly Passenger Enplanements Forecast, 2020-2025

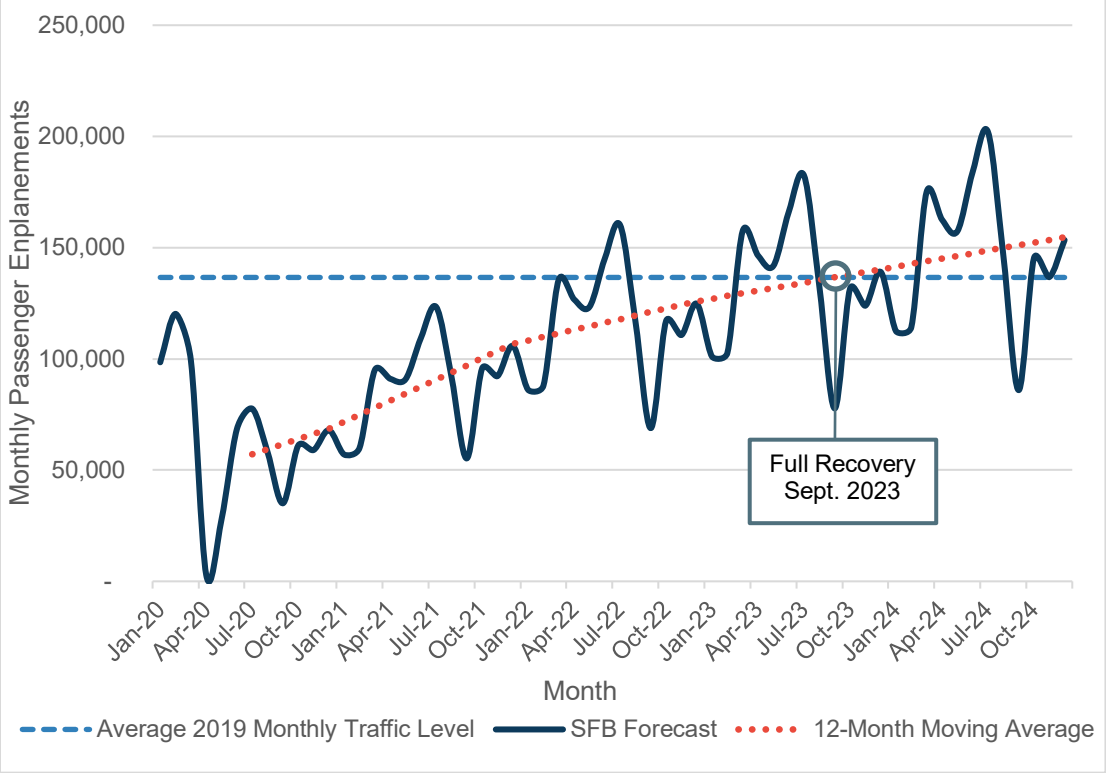


Source: MCO Airport Monthly Traffic Report, 2020; Kimley-Horn, 2020

Orlando Sanford International (SFB)

SFB functions as a secondary airport for the Orlando metropolitan area and is primarily served by ULCCs that bring additional leisure travelers to the region. As a leisure-heavy airport with a small portion of international traffic, SFB experiences wide variations in passenger traffic throughout the year. Similar to other leisure airports, traffic will partially rebound in 2021 and grow steadily until full recovery is achieved in September 2023. The forecasted monthly enplanement levels at SFB between 2020 and 2024 are illustrated in **Figure 3-23** as well a comparison of average forecast traffic levels and average 2019 traffic.

Figure 3-23: SFB Monthly Passenger Enplanements Forecast, 2020-2024



Sources: SFB Airport Monthly Traffic Report, 2020; Kimley-Horn, 2020

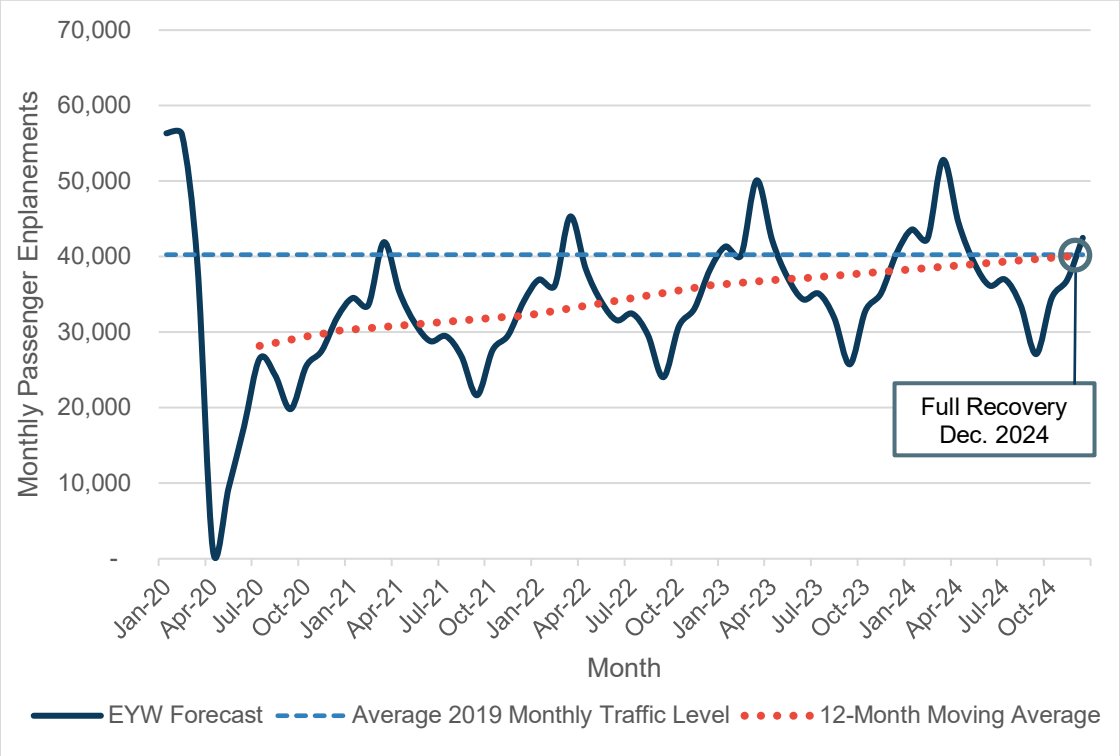
3.5.1.6. District 6

This analysis presents the forecast for the two airports in District 6: Key West International (EYW) and Miami International (MIA).

Key West International (EYW)

EYW is another popular beach destination airport that provides leisure access to the Florida Keys. Unfortunately, no monthly enplanement data was reported by EYW, so information from the FAA ACAIS database was used instead. As a result, it is impossible to determine the seasonality of traffic at EYW. However, traffic growth at EYW is forecasted to be similar to other small leisure airports in the state and passenger traffic is expected to recover by late 2024. **Figure 3-24** presents the forecasted monthly passenger enplanements at EYW between 2020 and 2024 compared to average monthly 2019 passenger traffic levels.

Figure 3-24: EYW Monthly Passenger Enplanements Forecast, 2020-2024

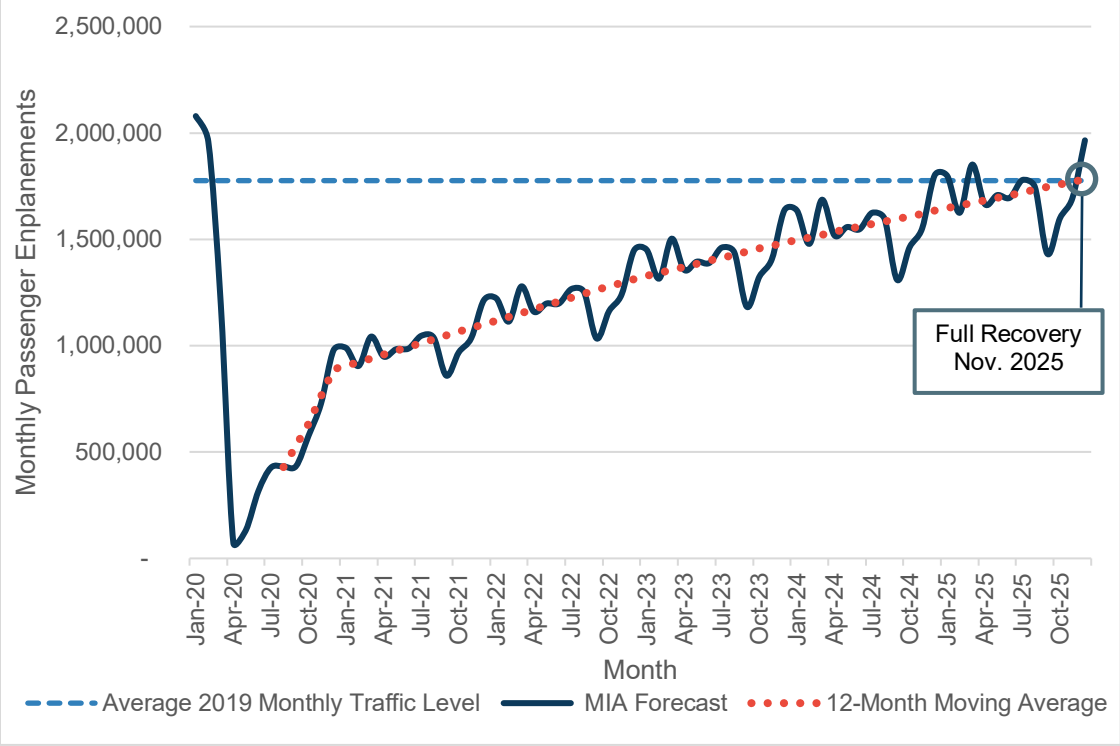


Sources: EYW Airport Monthly Traffic Report, 2020; FAA ACAIS Report, 2020; Kimley-Horn, 2020

Miami International (MIA)

As mentioned previously, MIA is the busiest airport in Florida in terms of international airline traffic. As a result, MIA receives a wide variety of passenger traffic from all parts of the globe. This diverse traffic mix means that MIA experiences relatively consistent traffic levels year-round, however, the large presence of international traffic at MIA may result in a slower recovery. As such, MIA is not expected to return to 2019 traffic levels until the end of 2025. Passenger traffic is projected to return to average 2019 levels by the end of 2025, as illustrated in **Figure 3-25**.

Figure 3-25: MIA Monthly Passenger Enplanements Forecast, 2020-2025



Sources: MIA Airport Monthly Traffic Report, 2020; Kimley-Horn, 2020

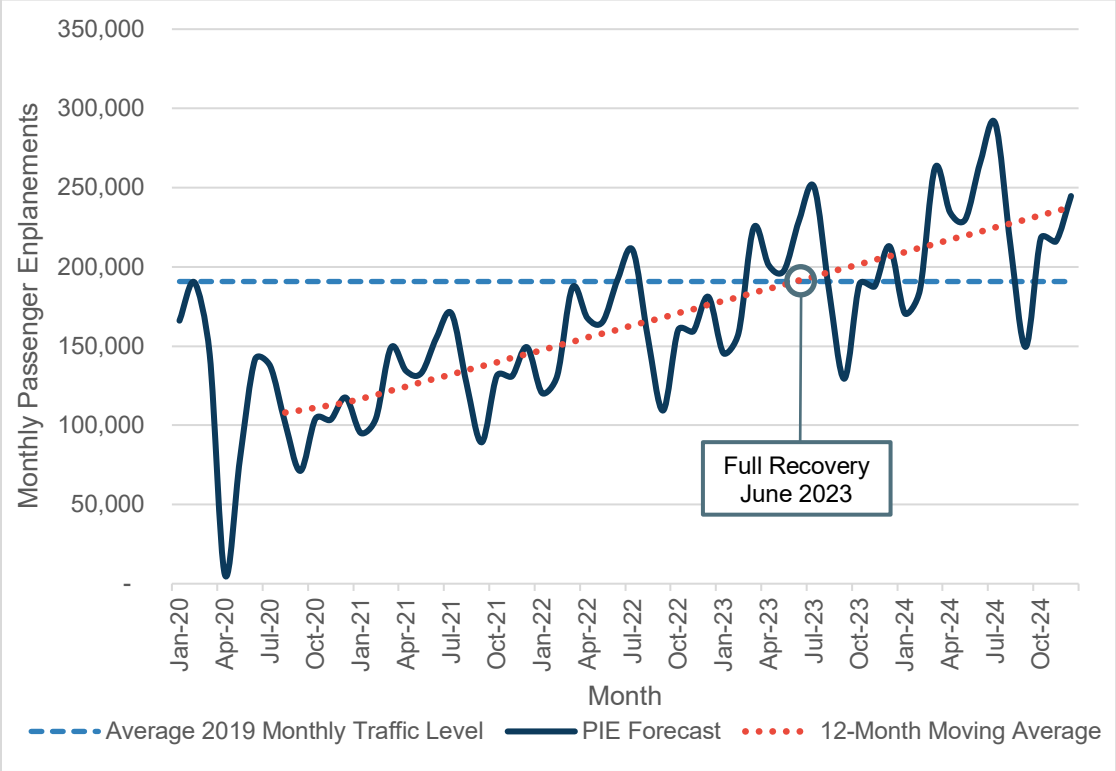
3.5.1.7. District 7

This analysis presents the forecast for the two airports in District 7: St. Pete-Clearwater International (PIE) and Tampa International (TPA).

St. Pete-Clearwater International (PIE)

PIE is the secondary airport for the Tampa-St. Petersburg metropolitan area and is almost exclusively served by ULCCs. Due to these factors, PIE receives high levels of leisure traffic and experiences large fluctuations in passenger traffic levels between seasons. Fortunately, the high levels of leisure traffic will likely cause PIE to recover rapidly compared to other airports. As shown in **Figure 3-26,** monthly passenger traffic is projected to return to average 2019 levels by mid-2023, which is the second shortest recovery period of any airport in the state.

Figure 3-26: PIE Monthly Passenger Enplanements Forecast, 2020-2024

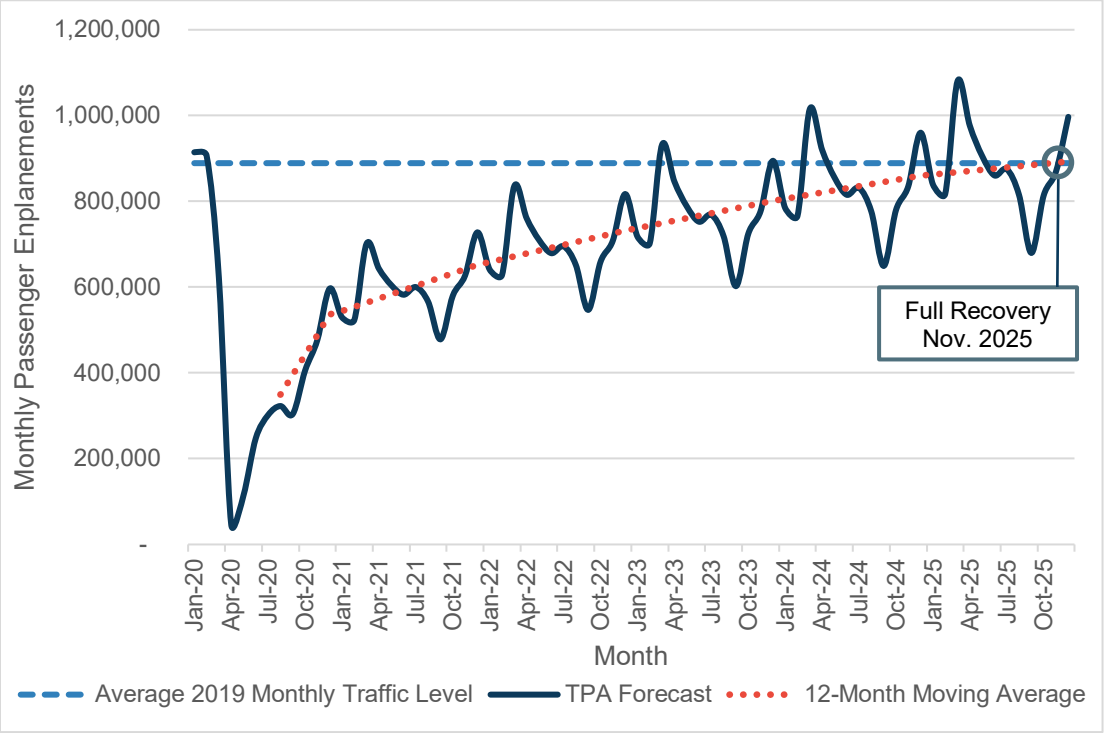


Sources: PIE Airport Monthly Traffic Report, 2020; Kimley-Horn, 2020

Tampa International (TPA)

TPA is the smallest of the four large hub airports in terms of annual passenger traffic. However, TPA still receives a large number of international leisure and business visitors. As a result, TPA experiences relatively steady traffic levels throughout the year. Once again, TPA is projected to take five years to reach full recovery, which is similar to the timelines presented for MIA and MCO. The projected monthly passenger enplanement levels for TPA between 2020 and 2025 are compared to 2019 average traffic levels in **Figure 3-27**.

Figure 3-27: TPA Monthly Passenger Enplanements Forecast, 2020-2025

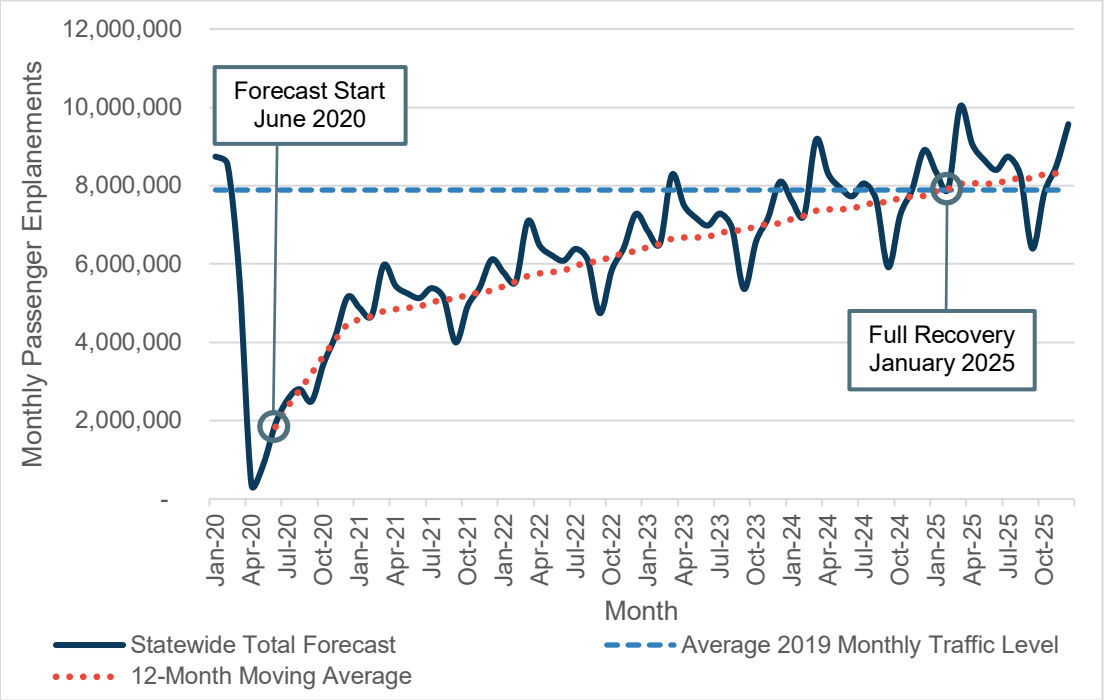


Sources: TPA Airport Monthly Traffic Report, 2020; Kimley-Horn, 2020

3.5.2. Statewide Recovery Forecasts

Figure 3-28 presents the projected recovery of Florida's commercial airport system as a whole. Although the number of actual enplanements will vary throughout each year, the state is projected to experience an average growth in passenger traffic of 1.31 percent per month between June 2020 and July 2024. The statewide airport system is expected to reach 2019 traffic levels by January 2025, approximately 12 months after the nationwide airline industry is expected to recover. As this analysis measures actual enplanement numbers, the delayed recovery is due to the high number of international passengers that flow into the state through the four large hubs airports.

Figure 3-28: Statewide Monthly Passenger Enplanements Forecast, 2020-2025



Sources: Airport Monthly Traffic Reports (DAB, ECP, FLL, GNV, JAX, MCO, MIA, PBI, PGD, PIE, PNS, RSW, SFB, SRQ, TLH, TPA, VPS, VRB), 2020; FAA ACAIS Report, 2020; Kimley-Horn, 2020

3.5.3. Forecast Summary

Table 3-3 and **Table 3-4** present the forecasted number of annual enplanements at each of Florida's 20 commercial service airports compared to 2019 passenger enplanements. The enplanement numbers and YoY change percentages presented in the tables represent the annual forecasted passenger enplanements as opposed to the monthly enplanement projections presented in the individual airport analysis in **Section 3.5.1**. Therefore, the enplanement projections listed in the following tables do not reflect the year-end enplanement projections for each year of the forecast that is illustrated in the forecast charts presented above.

Table 3-3: Annual Passenger Enplanement Forecasts by Airport, 2020-2025

Airport Name	City	FAA ID	Annual Passenger Enplanements						
			2019 (Baseline)	2020	2021	2022	2023	2024	2025
District 1									
Punta Gorda	Punta Gorda	PGD	821,528	592,409	661,123	718,132	788,052	854,103	N/A
Sarasota/Bradenton International	Sarasota/Bradenton	SRQ	974,399	636,941	732,175	890,480	1,030,394	1,133,291	N/A
Southwest Florida International	Fort Myers	RSW	5,039,408	3,116,246	3,752,882	4,308,864	4,868,676	5,273,844	N/A
District 2									
Gainesville Regional	Gainesville	GNV	269,887	119,817	153,353	195,632	245,831	296,030	N/A
Jacksonville International	Jacksonville	JAX	3,472,151	1,333,280	1,908,480	2,533,467	3,158,454	3,783,441	N/A
District 3									
Destin-Fort Walton Beach	Destin/Fort Walton Beach	VPS	813,314	453,232	696,776	836,574	910,616	976,982	N/A
Northwest Florida Beaches International	Panama City	ECP	620,845	405,849	539,567	569,367	598,857	628,658	N/A
Pensacola International	Pensacola	PNS	1,098,227	641,029	863,458	959,710	1,062,475	1,150,772	N/A
Tallahassee International	Tallahassee	TLH	432,755	165,943	216,179	301,608	369,118	436,628	N/A
District 4									
Fort Lauderdale/Hollywood International	Fort Lauderdale	FLL	17,942,566	8,711,639	11,595,423	14,094,945	17,009,103	19,162,211	21,315,319
Palm Beach International	West Palm Beach	PBI	3,452,636	1,465,257	1,821,052	2,876,177	3,307,712	3,597,733	N/A
Vero Beach Regional	Vero Beach	VRB	7,295	3,575	5,764	6,468	7,270	8,257	N/A
District 5									
Daytona Beach International	Daytona Beach	DAB	338,158	177,327	262,629	291,761	318,005	331,530	N/A
Melbourne International	Melbourne	MLB	239,233	125,200	185,443	206,020	125,200	125,200	N/A
Orlando International	Orlando	MCO	24,553,206	12,118,538	17,368,591	19,316,748	21,357,213	23,283,365	24,633,388
Orlando Sanford International	Orlando	SFB	1,510,469	756,153	987,208	1,297,103	1,480,884	1,640,389	N/A
District 6									
Key West International	Key West	EYW	483,178	334,890	374,541	410,768	446,438	470,211	N/A
Miami International	Miami	MIA	21,310,504	9,327,516	12,017,244	14,574,505	16,858,801	18,768,128	20,558,210
District 7									
St. Pete-Clearwater International	St. Petersburg/ Clearwater	PIE	1,125,744	669,413	768,932	951,302	1,133,673	1,316,043	1,498,414
Tampa International	Tampa	TPA	10,920,745	5,273,183	7,307,037	8,538,643	9,454,840	10,236,922	10,790,326
Statewide Total			**95,426,248**	**46,466,092**	**62,241,272**	**73,878,317**	**84,636,137**	**93,597,412**	**101,634,786**

Sources: Airport Monthly Traffic Reports (DAB, ECP, FLL, GNV, JAX, MCO, MIA, PBI, PGD, PIE, PNS, RSW, SFB, SRQ, TLH, TPA, VPS, VRB), 2020; Bureau of Transportation Statistics Passenger Traffic Reports, 2020; Kimley-Horn, 2020

Table 3-4: Forecasted Year-over-Year Change in Passenger Enplanements by Airport, 2020-2025

Airport Name	City	FAA ID	Forecasted Year-over-Year Change in Passenger Enplanements (Index Year: 2019)					
			2020	2021	2022	2023	2024	2025
District 1								
Punta Gorda	Punta Gorda	PGD	72%	80%	87%	96%	104%	N/A
Sarasota/Bradenton International	Sarasota/Bradenton	SRQ	65%	75%	91%	106%	116%	N/A
Southwest Florida International	Fort Myers	RSW	62%	74%	86%	97%	105%	N/A
District 2								
Gainesville Regional	Gainesville	GNV	44%	57%	72%	91%	110%	N/A
Jacksonville International	Jacksonville	JAX	38%	55%	73%	91%	109%	N/A
District 3								
Destin-Fort Walton Beach	Destin/Fort Walton Beach	VPS	56%	86%	103%	112%	120%	N/A
Northwest Florida Beaches International	Panama City	ECP	65%	87%	92%	96%	101%	N/A
Pensacola International	Pensacola	PNS	58%	79%	87%	97%	105%	N/A
Tallahassee International	Tallahassee	TLH	38%	50%	70%	85%	101%	N/A
District 4								
Fort Lauderdale/Hollywood International	Fort Lauderdale	FLL	49%	65%	79%	95%	107%	119%
Palm Beach International	West Palm Beach	PBI	42%	53%	83%	96%	104%	N/A
Vero Beach Regional	Vero beach	VRB	49%	79%	89%	100%	113%	N/A
District 5								
Daytona Beach International	Daytona Beach	DAB	52%	78%	86%	94%	98%	N/A
Melbourne International	Melbourne	MLB	52%	78%	86%	96%	104%	N/A
Orlando International	Orlando	MCO	49%	71%	79%	87%	95%	100%
Orlando Sanford International	Orlando	SFB	50%	65%	86%	98%	109%	119%
District 6								
Key West International	Key West	EYW	69%	78%	85%	92%	97%	N/A
Miami International	Miami	MIA	44%	56%	68%	79%	88%	96%
District 7								
St. Pete-Clearwater International	St. Petersburg/ Clearwater	PIE	59%	68%	85%	101%	117%	133%
Tampa International	Tampa	TPA	48%	67%	78%	87%	94%	99%
Statewide Total			**49%**	**65%**	**77%**	**89%**	**98%**	**107%**

Sources: Airport Monthly Traffic Reports (DAB, ECP, FLL, GNV, JAX, MCO, MIA, PBI, PGD, PIE, PNS, RSW, SFB, SRQ, TLH, TPA, VPS, VRB), 2020; Bureau of Transportation Statistics Passenger Traffic Reports, 2020; Kimley-Horn, 2020

3.6. Recovery

In order to recover fully from the pandemic, the commercial aviation industry will have to change in many ways beyond the number of passengers that travel through airports. These changes may remain in place after the industry recovers to prevent similar events in the future and could change the landscape of the global aviation industry for years to come. Many airports have already started to make some of these changes, including several of the commercial service airports in Florida. Some of the qualitative responses provided by Florida airport representatives are presented below along with an overview of possible future trends. Additionally, recommendations regarding how FDOT may help facilitate industry recovery are offered.

3.6.1. Airport Responses

During the outreach process, airport representatives were asked to provide qualitative response about how their airport planned to recover from the pandemic in addition to the quantitative projections discussed above. Many airports plan to maintain normal operations for the foreseeable future and hope to ride out the pandemic without any significant lasting consequences. However, some airports reported that they were planning to reduce operating and capital improvement budgets in 2021 and 2022 to remain financially stable. Several airports indicated that they halted all discretionary funding for the foreseeable future, including canceling purchases for airport equipment and infrastructure. While this will alleviate the financial strain on airports in the immediate term, it could cause shortcomings in adequate airport infrastructure once passenger traffic returns to pre-pandemic levels. Other airport responses included an airport constructing a new terminal to meet demand needs once traffic returns and other airports using CARES Act funding to stabilize rents charges until recovery is complete.

3.6.2. Industry Trends

A series of trends have begun to emerge among consumers, airlines, and airports that will likely continue beyond the industry recovery period. These trends include a shift in consumer behaviors, numerous airline restructurings or consolidations, airline fleet restructuring, updated airline and airport procedures, and the possibility of a future pilot shortage.

3.6.2.1. Shifts in Consumer Behaviors

The pandemic has forced millions of businessmen and women to shift how they do business from in-person meetings to using virtual meeting technology. The general success of such virtual business practices has illustrated that travel may not be a necessity of doing business after the pandemic is controlled. As a result, there could be a decline in business air travel demand that extends beyond the industry recovery period. For those businesses that do travel, there could be a shift away from commercial flights towards the use of chartered business aircraft or purchase of general aviation (GA) aircraft. Charter operations have already become more popular since the beginning of the pandemic as companies and business travelers have opted to travel in smaller groups in a more isolated environment than a commercial passenger airline provides. For example, Paramount Business Jets, a global charter aircraft operator, reported that charter requests in April increased 53 percent in North America and 103 percent globally, illustrating the rapid shift away from commercial airline usage after the pandemic started.

3.6.2.2. Airline and Fleet Restructuring

Although the COVID-19 Pandemic is impacting the aviation industry differently compared to 9/11 and the Global Financial Crisis, there are several airline trends related to both airline management and fleet structure that are similar to past upsets. It is highly likely that the airline industry will change during the recovery period as multiple airlines have already had to file for bankruptcy. Airlines could restructure or merge, creating a smaller number of large airlines, reducing overall competition, and increasing airfare prices. This could boost the passenger segment briefly but could negatively affect overall passenger demand. As a result, airlines may focus on serving profitable routes, which, although it will boost traffic at select hub airports, will adversely affect regional airports. This shift could further reduce connectivity and lead to a reduction in overall economic activity for airports. The growth in popularity of ULCCs in recent years could also affect airline structuring. If mainline carriers consolidate service between hubs, ULCCs could enter new markets to fill the void left by legacy airlines, further strengthening the ULCC segment, particularly in small and medium markets.

In addition to the reorganization of airline management and route structuring, airlines are likely to alter their aircraft fleets to maximize operating efficiency. Boeing has predicted that airlines will retire approximately five percent of the total fleet each year during the recovery period, which is more than double the normal retirement rate.[2] Airlines have already started retiring older and larger aircraft such as the Boeing 747 and Airbus A380 while shifting towards smaller or more efficient aircraft such as the Airbus A321LR and the Boeing 787. As a result, airports that have been built to accommodate heavy jet aircraft will soon be over-equipped, creating high overhead costs and adversely affecting large airports around the globe. Conversely, airports served only by smaller commercial aircraft have the potential to be served by larger aircraft depending on the airlines' fleet availability and route planning, causing a possible overextension of airport infrastructure capabilities.[3] Additionally, the increased retirement rate will result in a smaller airline fleet that will not be equipped to meet passenger demand once the recovery period is over. As a result, there will likely be an influx of new aircraft purchases in the next decade once recovery begins as airlines will have capital to purchase new aircraft and will need to grow airline fleets to meet demand.

The airline industry may also undergo other changes to cater to consumer preferences and improve overall safety in aviation. Specifically, airlines and airports may continue to conduct heightened cleaning procedures onboard aircraft and in airports well beyond the industry's recovery period to maintain public confidence in the safety of air travel. Furthermore, airlines, airports, and agencies such as the TSA may continue the use of additional passenger screening to identify travelers that may pose a risk of infecting other users. However, these changes may pose additional challenges and expenses for the industry and may be modified appropriately.

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[2] Boeing. (October 2020). "Commercial Market Outlook". Available Online at: https://www.boeing.com/resources/boeingdotcom/market/assets/downloads/2020_CMO_PDF_Download.pdf. (Accessed October 2020).

[3] Gittens, A. (May 2020). "COVID-19: Exploring the airport industry's path to economic recovery". Available online at: https://blog.aci.aero/covid-19-exploring-the-airport-industrys-path-to-economic-recovery/. (Accessed October 2020).

Finally, certain challenges that existed in the industry before the pandemic have changed but remain a threat to the stability of airlines and aviation. Specifically, the chronic pilot shortage that has existed in the industry for nearly a decade quickly dissipated as airlines suspended hiring and furloughed thousands of pilots between March and October 2020. However, given that many airlines have offered early retirement to flight crews, this shortage will likely return as the airline industry recovers. This problem could be further exacerbated as prospective pilots delay or cancel their flight training due to poor career prospects, further constricting the pipeline of new pilots into the industry.

3.6.3. Recommendations

During completion of this analysis, the project identified two primary recommendations for the FDOT Aviation Office and Florida airports that will possibly benefit the airports and facilitate a more rapid recovery. The recommendations are listed below for FDOT's consideration:

- The FDOT Aviation Office should consider re-evaluating these forecasts during the summer of 2021. This will allow time for data (passengers, enplanements, schedule frequency, etc.) to be gathered for an entire year following the initial downturn. At that time, there may also be new information that results in more accurate, industry-wide recovery forecasts.
- As mentioned above, these forecasts are dependent on the development of a vaccine and it being widely available and distributed with high acceptance by the public. Until then, passenger traffic may remain depressed. Airports should seek to identify and secure alternate revenue streams in the near-term, focusing on airport resiliency during the pandemic. Airports should plan for long-term recovery once revenue streams stabilize, and passenger traffic begins to recover.

3.7. Summary

As the COVID-19 pandemic continues to affect the global aviation industry and economy as whole, it is clear that recovery will not be immediate once the virus is controlled. This analysis provides a high-level evaluation of information gathered from industry organizations and airport representatives at Florida commercial service airports. The data was utilized to develop growth rates and recovery timelines for the statewide commercial airport system and each individual commercial airport in the state. Additionally, the qualitative recovery plans of airports are discussed, along with future trends that may emerge in the aviation industry as recovery occurs. Finally, recommendations were made to FDOT and Florida commercial service airports to lessen the future impacts of the pandemic and to foster more rapid recovery.

Chapter 4. Economic Impact Update

4.1. Introduction

The COVID-19 pandemic has caused Florida's airport system and the global aviation industry as whole to rapidly transition from a period of healthy growth to a crisis period with depressed business activity and financial uncertainty. The Florida Department of Transportation (FDOT) Aviation Office (AO) determined that it would be important to quantify the effects of the pandemic on the annual economic impacts generated by Florida's 20 commercial service airports using the findings of the 2019 Florida Statewide Aviation Economic Impact Study (EIS, the 2019 Study). The most recent update to the Florida Statewide EIS was published in March 2019 and identified the economic impacts of on- and off-airport activities at 20 commercial service airports across the state, using economic data in 2017. This chapter quantifies the change in economic impact at Florida airports and documents notable impacts to airlines, airports, and aviation businesses. Additionally, airport responses during the outreach phase regarding changes to passenger traffic were taken into consideration. The subsequent analysis discusses the following topics:

- Results
- Economic Impact Changes at Florida Commercial Service Airports
- Aviation Industry Impacts
- Summary

4.2. Results

The pandemic's impact on the Florida statewide aviation system revealed a 21 percent decline in total output compared to the Study published in 2019. This resulted in an estimated statewide impact of $137 billion in total output in 2020, a $37.4 billion decrease from the 2019 Study. **Table 4-1** presents a summary of the findings of the 2019 Florida Statewide Aviation EIS as well as estimates of the 2020 visitor spending impacts and total statewide economic impacts as determined in this analysis. The following sections detail the methodology to estimate economic impact at Florida's commercial service airports in 2020.

Table 4-1: Updated Statewide Aviation Economic Impact Results

Economic Impact Category	From 2019 Study	2020 COVID Update
On-Airport Activities	$72,014,206,000	No Change – Impacts not determined in analysis
Visitor Spending (Commercial Service Airports)	$86,430,372,000	$48,967,842,124
Visitor Spending (General Aviation Airports)	$4,302,161,000	No Change – Impacts not determined in analysis
Military Spending Impacts	$9,815,780,000	No Change – Impacts not determined in analysis
Industry Reliance Impacts	$2,281,049,000	No Change – Impacts not determined in analysis
Total Economic Impacts (Output)	**$174,843,568,000**	**$137,381,038,124**

Sources: Florida Statewide Aviation Economic Impact Study, 2019; Kimley-Horn, 2020

4.3. Economic Impact Changes at Florida Commercial Service Airports

FDOT utilizes Statewide Aviation Economic Impact studies to quantify the monetary and employment impacts of the Florida airport system. As mentioned previously, the most recent Florida Statewide Aviation EIS was completed in March 2019 and utilizes 2017 and 2018 data to measure economic impacts. The 2019 Florida Statewide EIS communicates these impacts through four metrics:

- On-Airport Activity
- Visitor Spending
- Military Spending
- Industry Reliance

A new statewide aviation economic impact study would be required to accurately estimate the change in on-airport, military, and industry reliance impacts. This would require surveying at each tenant located at each airport, as well as more in-depth surveying with the airport management staff. As such, the scope of this analysis focused primarily on the change in passenger traffic and subsequent visitor spending impacts.

It is important to note the difference in commercial service airports analyzed in the 2019 economic impact study and this analysis. In the 2019 Study, Northeast Florida Regional (SGJ) was included as a commercial service airport but lost its commercial service status, therefore it was not included in this analysis. Vero Beach Regional (VRB) was considered a general aviation airport in the 2019 Study but gained commercial service status shortly after the 2019 Study was published. Therefore, VRB was included in this analysis.

4.3.1. Impact of 2020 Passenger Traffic Levels

Data was gathered from airport representatives regarding changes to monthly passenger enplanement levels between 2019 and 2020. This data was used to form the baseline for forecasts through the end of 2020 which are discussed in **Chapter 3: Airport Forecasts and Recovery**. However, to appropriately quantify the change in economic impact from the 2019 Study, the 2020 passenger levels were compared to those experienced in 2017 (the base year used in the 2019 Study). **Table 4-2** provides a comparison between 2017, 2019, and the forecasted 2020 calendar year enplanement data. As shown, 2020 statewide calendar year enplanements are forecasted to reach approximately 57 percent of 2017 levels and 50 percent of 2019 levels.

Table 4-2: Annualized Statewide Enplanement Comparison

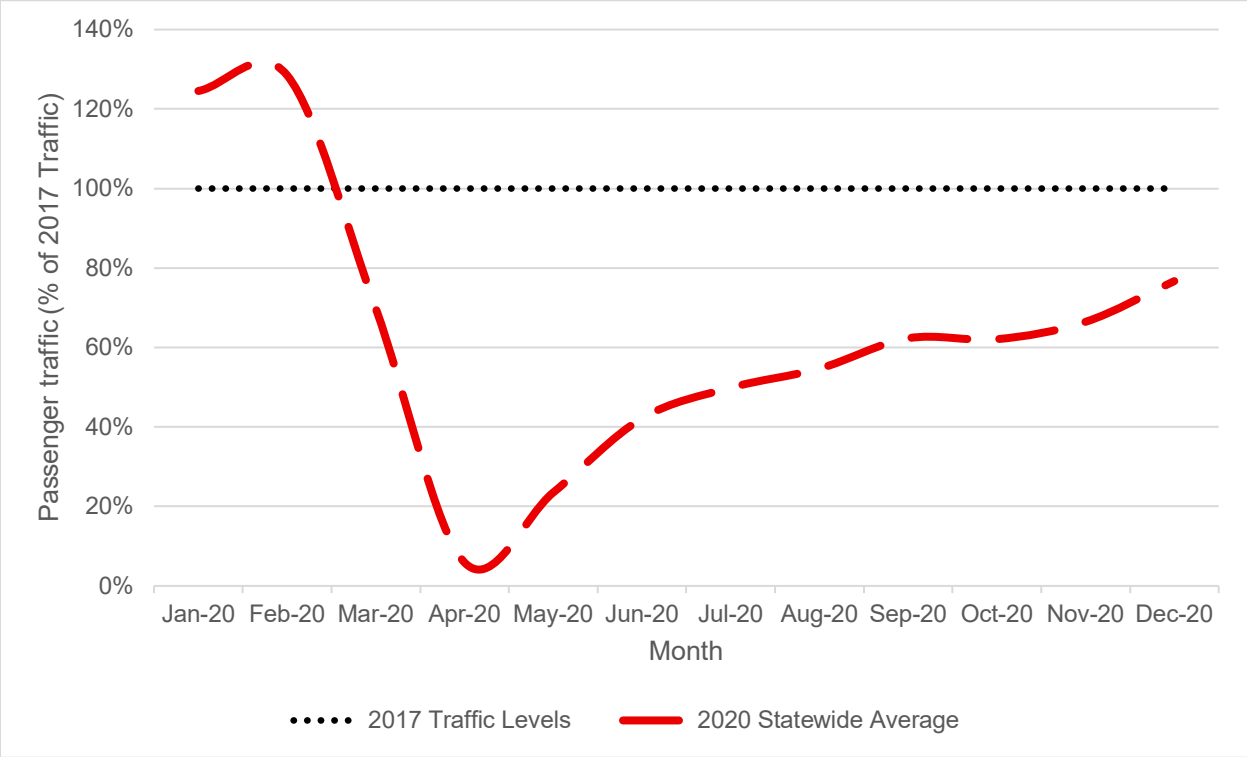
	2017	2019	2020 (Forecasted)
CY Enplanements	82,385,490	95,405,183	46,676,180

Sources: Bureau of Transportation Statistics, Kimley-Horn, 2020

The change in passenger enplanements between 2017 and 2020 is also illustrated in **Figure 4-1.** Passenger traffic declined steeply in March 2020 and reached the lowest point in April, as airports reported a 94 percent average decrease in passenger traffic from the same month in 2019. Traffic increased after April 2020 and is projected to steadily increase through the end of 2020. However, passenger traffic levels are still severely depressed compared to 2017. In total, the number of annual passenger enplanements are expected to decrease 43.3 percent in 2020 compared to 2017. It is

important to note that this data does not align with the year over year (YoY) change data presented in **Chapter 1: Outreach and Results** or **Chapter 3: Airport Forecasts and Recovery** as those chapters provide a comparison between 2019 and 2020 traffic levels.

Figure 4-1: YoY Change in Statewide Airport Passenger Enplanement Levels 2017 Vs. 2020



Sources: Bureau of Transportation Statistics, 2020; Kimley-Horn, 2020

4.3.2. Methodology and Results

Average passenger traffic levels were calculated to determine the annual change in passenger enplanements between CY 2017 and estimated CY 2020 using historic passenger enplanements (2017) and internally developed forecasts (2020).

Based on 2020 year-end forecasts, Florida's commercial service airports are expected to experience a 43 percent YoY decrease of passenger enplanements compared to 2017. To quantify this in terms of economic impact, visitor spending impacts documented in the 2019 Study were reduced commensurately by 43 percent, or $37.4 billion. This equated to an estimated 2020 commercial service visitor spending impact of $48.9 billion.

As noted previously, commercial service visitor spending was the only economic impact metric re-evaluated to estimate 2020 economic impact at Florida's airports. Visitor spending represented a fraction of total statewide economic output. Therefore, the 43 percent reduction in visitor spending resulted in a 26 percent reduction in total output at commercial service airports specifically, from $144.2 billion in the 2019 Study to $106.8 billion estimated in 2020. When applied to all airports (commercial service and general

aviation), the reduction in total statewide economic output is estimated at 21 percent, from $174.8 billion in the 2019 Study to $137.3 billion estimated in 2020.

Table 4-3 presents the 2020 estimated economic impact due to the pandemic.

Table 4-3: Updated Statewide Commercial Service Economic Impacts

Change in Statewide Annual Passenger Enplanements (2017-2020 [%])	**-43%**
Commercial Service Airport Impacts	
2017 Commercial Service Visitor Spending Impacts	$86,430,372,000
Estimated Change in Commercial Service Visitor Spending Impacts (2017-2020)	(-$37,462,529,876)
Estimated 2020 Commercial Service Visitor Spending Impacts	$48,967,842,124
2017 Florida Commercial Service Airport Economic Output	$144,274,770,000
Estimated 2020 Commercial Service Airport Economic Output	$106,812,240,124
Estimated Change in Commercial Service Economic Output (2017-2020)	-26%
Statewide Impacts	
2017 Florida Statewide Airport Economic Output (All Airports)	$174,843,568,000
Estimated Florida Statewide Airport Economic Output (All Airports)	**$137,381,038,124**
Estimated Change in Statewide Economic Output (2017-2020)	-21%

Sources: Florida Statewide Aviation Economic Impact Study, 2019; Kimley-Horn, 2020

4.4. Aviation Industry Impacts

As a result of travel restrictions and health advisories, global travel and tourism has largely been paused in 2020 to mitigate the spread of the virus. The United Nations World Tourism Organization (UNWTO) highlights that all world destinations have adopted travel restrictions and as a result, the year-to-date data between January and June of 2020 shows a 65 percent decline in international tourism activity compared to the prior year. These impacts are spread throughout several segments of the aviation industry including airlines, airports, and aviation businesses. In addition, as the aviation industry serves to facilitate a significant amount of tourism and business activity, the impacts can also be seen throughout these related industries. The following sections assess the impacts of the pandemic throughout the overall aviation system and highlight the efforts that have been taken by aviation stakeholders to mitigate these impacts.

4.4.1. Airlines

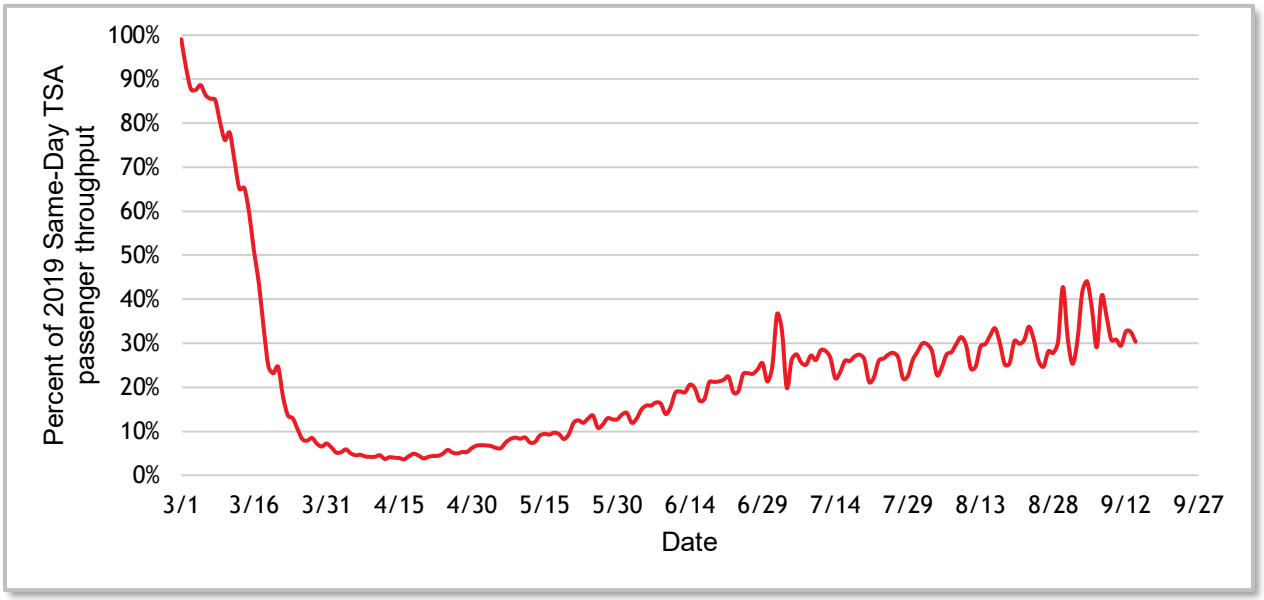
The airline industry was one of the first industries impacted from the COVID-19 pandemic. With governments adopting travel restrictions that aimed to slow the spread of the virus, airline activity has experienced an unprecedented decline in demand. Airlines were forced to take dramatic action to significantly scale back operations and adapt to new health mandates. The following subsections provide insight into the impacts to airline passenger traffic, revenue generation, and the actions that the federal government and airlines have taken to combat the pandemic.

4.4.1.1. Airline Passenger Traffic

Global passenger traffic has decreased dramatically since the pandemic began, starting with the decline of international passenger enplanements in late February. This is the result of many countries adopting international travel bans to slow the spread of COVID-19. This was quickly followed with a decline in U.S. domestic passenger volumes in mid-March, coinciding with the WHO declaring COVID-19 as a pandemic. In total, airlines are projected to experience a 61 percent reduction in both international and domestic passenger traffic in 2020 compared to 2019.[1]

The Transportation Security Administration (TSA) publishes a daily count of passengers that flow through TSA checkpoints at all commercial service airports across the United States. The number of daily screened passengers declined sharply in March, dropping from 99.1 percent of the previous year's throughput on March 1st to only 10.5 percent of previous year throughput on March 25th. Traffic continued to decline through April, reaching as low as 87,534 screened passengers on April 14th, which is only four percent of the total passengers screened by TSA on the same day in 2019. Fortunately, traffic slowly increased during the summer of 2020 to reach nearly 30 percent of 2019 throughput by September. However, throughput levels became more cyclical from June through September 2020, reflecting the travel volume discrepancy between certain days of the week.[2] **Figure 4-2** illustrates the year-over-year (YoY) change in daily passenger screening volume trend compared to 2019.

Figure 4-2: TSA Screening YoY Comparison



Source: TSA, September 2020

[1] International Civil Aviation Organization (ICAO). (September 2020). "Effects of Novel Coronavirus (COVID-19) on Civil Aviation: Economic Impact Analysis". Available online at: https://www.icao.int/sustainability/Documents/COVID-19/ICAO_Coronavirus_Econ_Impact.pdf. (Accessed September 2020)

[2] Transportation Security Administration (TSA). (September 2020). "TSA checkpoint travel numbers for 2020 and 2019". Available online at: https://www.tsa.gov/coronavirus/passenger-throughput. (Accessed September 2020)

Load factor, another metric that is widely used to evaluate air traffic, represents the proportion of total available seats compared to revenue passengers on each flight. The Bureau of Transportation Statistics (BTS) T-100 segment data indicates that the load factor among domestic flights dropped by 17 percent between February and March. The impact to international flight load factors was less significant than domestic flight load factors but was distributed across a longer timeframe, resulting in a 56 percent drop-off between January and May 2020. Average total load factor declined to 16.8 percent in April, which is the lowest average load factor recorded by BTS since before 9/11. Since then, load factors improved as the system-wide average load factor increased to 46 percent as of July 2020. However, average load factors remained approximately 42 percent lower than July 2019. Domestic load factors increased faster than international load factors, likely due to the continued international travel restrictions in place.[3]

4.4.1.2. Airline Revenues

The cut in passenger traffic has been reflected in the sharp decline in airline ticket sales and ancillary fees, which is the greatest revenue stream for nearly all passenger airlines. The International Air Transport Association (IATA) projected that globally, airlines are forecasted to generate $241 billion in passenger revenue in 2020. This is a nearly 61 percent drop in revenue compared to 2019.[4] The largest decline in revenue was recorded in the second quarter of 2020, when the total operating revenue among U.S. carriers was 87 percent lower than 2019.[5]

It is also important to recognize what potential passenger revenue was lost in 2020 as a result of the pandemic. To determine this, ICAO conducted a comparative analysis of the revenue forecasts developed before and during the pandemic. The forecasts developed prior to the pandemic are considered a baseline which represents the hypothetical "business as usual" scenario that doesn't account for the pandemic. This baseline was compared with the current forecasts that considers historical data through the early months of the pandemic and makes more founded projections for the remainder of 2020. The analysis projected that worldwide, airlines will lose approximately $370-392 billion in total gross passenger operating revenue in 2020 compared to the baseline 2020 forecast.[6]

4.4.1.3. CARES Act

On March 27, 2020, President Trump signed into law the Coronavirus Aid, Relief, and Economic Security (CARES) Act which provided more than $2 trillion in funding to stimulate the economy. Congress allocated $25 billion towards U.S. airlines to recover some of the lost passenger revenue realized systemwide.[7] As of September 29, 2020, seven airlines accepted loan funding from the CARES Act

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[3] Bureau of Transportation Statistics (BTS). (N.d). "Load Factor (passenger-miles as a proportion of available seat-miles in percent (%)) | All Carriers - All Airports". Available online at: https://www.transtats.bts.gov/Data_Elements.aspx?Data=5. (Accessed September 2020).
[4] International Air Transport Association (IATA). (June 2020). "Industry Statistics Fact Sheet". Available online at: https://www.iata.org/en/iata-repository/publications/economic-reports/airline-industry-economic-performance-june-2020-data-tables/. (Accessed September 2020)
[5] Airlines for America. (September 2020). "Tracking the Impacts of COVID-19". Available online at: https://www.airlines.org/dataset/impact-of-covid19-data-updates/#. (Accessed September 2020).
[6] International Civil Aviation Organization (ICAO). (September 2020). "Effects of Novel Coronavirus (COVID-19) on Civil Aviation: Economic Impact Analysis". Available online at: https://www.icao.int/sustainability/Documents/COVID-19/ICAO_Coronavirus_Econ_Impact.pdf. (Accessed September 2020)
[7] The Hill. (September 2020). "Treasury offers coronavirus relief loans to seven major US airlines". (Accessed September 2020).

including Alaska, American, Frontier, JetBlue, Hawaiian, SkyWest, and United. By accepting CARES Act funds, airlines were required to maintain 90 percent staffing levels and salaries until September 30, 2020. After this date, several airlines including Delta, American, and United furloughed and laid off thousands of employees and may continue to make staffing cuts until the industry recovers. In addition to this, many airlines have made requests for rent abatements and deferrals for flight slots occupied at the commercial service airports.

4.4.1.4. Airline Actions

Airlines have taken a wide range of actions in an effort to mitigate the negative impacts of the pandemic on financial performance and in-flight safety. These actions include a combination of revenue generation techniques, cost-cutting practices, and blanket safety guidelines to better protect passengers and crew from spreading the virus.

The most notable and drastic worldwide change enacted by nearly all airlines was a reduction in capacity. An estimate developed by the global consulting firm McKinsey and Company indicated that worldwide airline capacity was down 70-80 percent in April 2020 compared with April 2019.[8] This included grounding a significant proportion of aircraft within each airline's fleet, which has resulted in airfields around the world being filled with idle aircraft. The number of parked U.S. airline aircraft peaked in May when 3,204 aircraft, 52 percent of the total U.S. airline fleet, were temporarily grounded.[9] In June, airlines brought some aircraft back into service, and as of September 13, only 29 percent of all aircraft within U.S. airlines' fleets were listed as idle.

Idle aircraft at Orlando International Airport
(Photo courtesy of Diego Perez | Business Insider)

Airlines have also reduced available capacity by retiring older and larger aircraft that have relatively higher operating costs. Examples of this include Delta retiring their MD-80/88/90 fleet, American Airlines announcing plans to transition several of their aircraft out over the next few years, and numerous international airlines retiring the Boeing 747 and Airbus A380 from regular service.[10] Additionally, airlines have either delayed or canceled any existing or planned orders of new aircraft to prevent future over-capacity. This has placed a great stress on aircraft manufacturers and associated supply chain stakeholders that rely on orders for new aircraft to drive business activity.

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[8] McKinsey & Company. (April 2020). "Coronavirus: Airlines brace for severe turbulence". Available online at: https://www.mckinsey.com/industries/travel-logistics-and-transport-infrastructure/our-insights/coronavirus-airlines-brace-for-severe-turbulence#. (Accessed September 2020).
[9] Airlines for America. (September 2020). "Tracking the Impacts of COVID-19". Available online at: https://www.airlines.org/dataset/impact-of-covid19-data-updates/#. (Accessed September 2020).
[10] Pallini, T. (July 2020). "Even more iconic planes are disappearing from the sky earlier than planned as the coronavirus continues to wreak airline havoc". Available online at: https://www.businessinsider.com/coronavirus-havoc-forces-airlines-to-retire-iconic-planes-sooner-2020-3. (Accessed September 2020).

Airlines have also explored ways of increasing business revenue, including slashing airline ticket fares to stimulate passenger demand. The average fare recorded in the North America region decreased by nearly 40 percent from the beginning of 2020 until mid-April.[11] Some U.S. airlines have transitioned, using empty aircraft capacity towards fulfilling the influx of cargo demand. American Airlines and United Airlines used their fleet of widebody aircraft for cargo-only flights carrying medical supplies, military mail, and e-commerce packages to cities around the globe. This generated another revenue stream for airlines and provided much needed assistance to communities that were most impacted by the pandemic, boosting the public image of participating airlines. Despite these initiatives, the airlines have still reported dismal financial performance in Q2 2020.

For passengers and aircraft still operating, the flying experience has greatly changed since the start of the pandemic. This is a result of consolidation of airport services and numerous mandates and adjustments that airlines have adopted to meet requirements from public health agencies to limit the spread of COVID-19. Overall, airlines have worked to consolidate their footprint at airports with limited check-in areas, boarding lanes, and airport lounges, and have halted most planned real estate development. In addition, many U.S. domestic carriers have introduced social distancing measures throughout the passenger travel experience. This includes spreading out check-in and boarding queues, restricting travel bookings, and blocking out middle seats on aircraft. Furthermore, every major U.S. airline has implemented policies that require all passengers and crew to wear masks or face coverings for the duration of the travel experience and warn that those who do not comply may be banned from future travel. Airlines have also implemented new cleaning policies for aircraft and terminal areas and have limited in-flight food/beverage services to limit personnel contact.

4.4.2. Airports

Commercial service airports and airlines are interdependent on one another; and the activities of each greatly influence the other. For passengers, airports represent the starting and ending point of every airline experience. As the pandemic caused air travel demand to decline, business and passenger activity decreased throughout the entire commercial service airport industry. The following subsections describe the impacts of the pandemic towards airport revenue, operations, and capital improvement projects, and discusses how the CARES Act provided financial support.

4.4.2.1. Airport Revenues

Commercial service airports generate revenue through several different streams. These can be classified as one of two types of revenues: Aeronautical or Non-aeronautical. Oftentimes, aeronautical revenues represent the primary revenue stream at an airport. Aeronautical revenues are usually generated from airlines and activities directly related to aircraft activity at the airport. This includes landing fees, aircraft parking charges, passenger facility charges (PFCs), fuel surcharges (if applicable), and transit/transfer fees. These funds are typically directed towards maintenance and upkeep of airports and thus, are a critical source of funding.

[11] Reuters. (April 2020). “U.S. air fares extend decline as Europe and Asia bottom out: Skytrax”. Available online at: https://www.reuters.com/article/us-health-coronavirus-airlines-fares/u-s-air-fares-extend-decline-as-europe-and-asia-bottom-out-skytra-idUSKCN22526O. (Accessed September 2020).

Non-aeronautical revenue is generated from complementing non-aviation businesses that feed into airport activity including retail shopping, food/beverage offerings, advertising, automobile parking, and rental car concessions. However, both aeronautical and non-aeronautical revenue streams are driven primarily by passenger traffic at airports, as approximately 90 percent of all non-aeronautical revenue collected by airports is passenger dependent. As a result of the pandemic and ensuing decline in passenger traffic, airports have incurred heavy revenue losses. Estimates indicate that total airport revenues within North America alone are expected to decrease by approximately 41 percent, amounting to at least $20.7 billion in lost revenue.[12]

4.4.2.2. Operations

In addition to the loss of revenues, many airports have experienced changes to operations during the COVID-19 pandemic. As nearly all commercial service airports in the U.S. are publicly owned and operated, they are obligated to comply with state and local regulations. These include social distancing and face covering mandates, new cleaning procedures, and closures of non-essential businesses. In addition, some airports have also implemented health screenings to determine if airport users are sick prior to boarding an aircraft. The scope of these mandates is largely dependent on state and local guidance as well as airport-specific conditions.

As nearly all U.S. publicly owned airports were identified as essential businesses and were thus allowed to remain open, there have been numerous instances where certain aviation facilities have been forced to temporarily shut down due to a possible COVID-19 outbreak. Between March 17th and July 9th, there were 88 total air traffic control facilities that reported at least one positive COVID-19 case.[13] In March alone, it was reported that 17 air traffic control centers were temporarily forced offline after some workers had tested positive for COVID-19.[14] This resulted in some of the busiest airports in the country including New York's John F. Kennedy International Airport (JFK), Chicago Midway International Airport (MDW), and Las Vegas' McCarran International (LAS) to transition to uncontrolled airspace or be handed off to other air traffic centers. In turn, this led to flight delays and cancellations around the country as air traffic control centers worked to manage traffic and return to normal operational status. Furthermore, airports have also temporarily closed some airfield movement areas such as taxiways and runways to allow for airlines to park idle aircraft as a result of reduced system capacity.

Some airports were also forced to close various terminal facilities such as lounges, duty-free shops, restaurants, and bars at the beginning of the pandemic. This was the result of remaining compliant with state and local mandates. However, as states have lifted these measures, airports have responded by

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[12] Airports Council International (ACI). (April 2020). "Economic Impact of Coronavirus on U.S. Commercial Airports". Available online at: https://airportscouncil.org/wp-content/uploads/2020/03/Economic-Impact-of-Coronavirus-on-U.S.-Commercial-Airports.pdf. (Accessed September 2020).
[13] Wolfstellar, Pilar. (July 2020). "FAA says 88 air traffic control facilities affected by coronavirus". Available online at: https://www.flightglobal.com/safety/faa-says-88-air-traffic-control-facilities-affected-by-coronavirus/139236.article. (Accessed September 2020).
[14] Pallini, Thomas. (March 2020). "17 air traffic control centers have been temporarily closed after workers tested positive for coronavirus, highlighting a vulnerability in air travel". Available online at: https://www.businessinsider.com/coronavirus-airports-and-faa-centers-temporarily-closed-for-cleaning-2020-3. (Accessed September 2020)

reopening these facilities with new safety protocols in place such as mask-wearing, social distancing, limited occupancy, and reduced seating capacity.

4.4.2.3. CARES Act

The CARES Act included $10 billion in funding that was directed towards supporting U.S. airports affected by the pandemic. The goal of this funding is to maintain reliability, safety, and integrity of the U.S. airport system, maintain current airport employment levels, and keep airport credit ratings stable. To accomplish this, the airport-specific CARES Act funding has been utilized for two specific purposes to support airport activity. Part of the funding was allocated to the FY 2020 Airport Improvement Program (AIP) and Supplemental Discretionary Grant Program, which increased the federal share of FY 2020 grants to 100 percent. This helped ensure that critical safety and capacity projects continued as planned regardless of airport sponsors' financial circumstances.

The remaining portion of airport-specific funding was directed towards airports that are included in the FAA's 2019-2023 National Plan of Integrated Airport Systems (NPIAS). Funding was separately allocated to three distinct classification of airports: primary airports, non-primary commercial service airports, and general aviation (GA) airports. Funding amounts given to both primary and non-primary commercial service airports was determined by a combination of metrics and formulas that considered airport enplanements, airport debt service, and unrestricted funding reserves

Several stipulations were put in place for airports that received funding through the CARES Act to support operating expenses (i.e. staff payroll and operational maintenance). This funding must be used immediately and can't be reinvested for future use or applied towards projects initiated before the Act was enacted.

4.4.2.4. Capital Improvement Projects

The impact of the pandemic regarding airport capital improvement projects has been profound throughout the industry. As the pandemic began in March and April 2020, most projects were forced to halt as sponsors and contractors were adapting their operations to the pandemic. According to a study conducted by the Airport Consultants Council (ACC), more than 90 percent of their member companies had experienced delays or cancellations of project work.[15] This was a result of the sudden change for engineering and design staff that were forced to start working remotely to comply with state and local mandates. In addition, the pandemic also created supply chain shocks which forced work crews to wait for materials and equipment which created further delays.

Airports rely on several forms of funding to support their development projects including airport revenues; federal, state, and local grants; and PFCs. As passenger enplanements dropped significantly due to the pandemic, these funding sources have been strained, which has resulted in interruptions in funding for current and anticipated airport improvement projects. Several large terminal improvement projects that

[15] Airport Consultants Council (ACC). (April 2020). "ACC Survey Identifies Initial Impacts from COVID-19 on Airport Development Projects". Available online at: https://www.aviationpros.com/airports/press-release/21133775/airport-consultants-council-acc-acc-survey-identifies-initial-impacts-from-covid19-on-airport-development-projects. (Accessed September 2020).

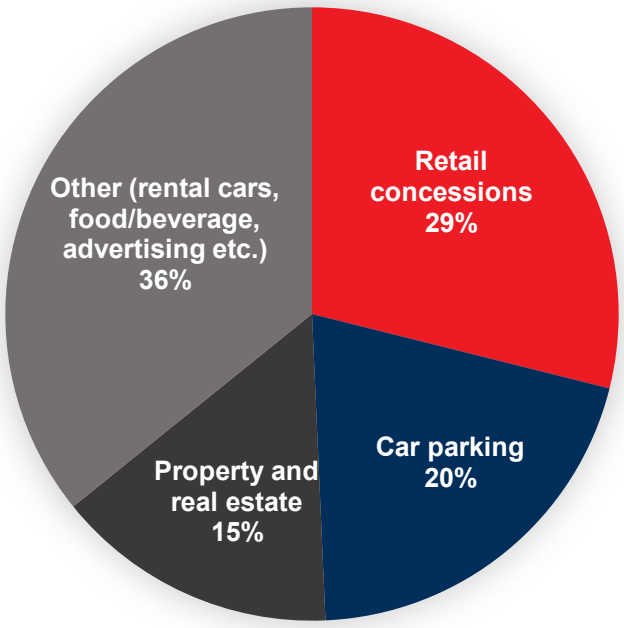
have been placed on an indefinite hold include San Francisco International's $1 billion Terminal 3 project and Dallas/Fort Worth International's $3 billion Terminal F expansion.[16]

Despite the halt in some larger expansion-focused projects, critical infrastructure projects such as pavement and facility maintenance have benefited from the decline in air traffic. With fewer aircraft operations and less passenger traffic, some of these maintenance projects have been accelerated during the pandemic without having to accommodate aircraft or passenger movement. These efforts are further supported by the CARES Act through the increase in federal funding to 100 percent for grants in fiscal year 2020.

4.4.3. Aviation Businesses

The impacts of the COVID-19 pandemic have not been limited to the airlines and airports. Aviation-related businesses have faced similar declines in business revenues and activities due to their dependency on passenger traffic flowing through airports. **Figure 4-3** presents the results of a survey conducted by the Airports Council International (ACI) regarding airports' primary non-aeronautical revenue streams by business type. As shown, retail concessions, food and beverage concessionaires, parking facilities, and rental car operators present the some of the most common revenues streams at airports. Given this, it is important to discuss how these businesses have been affected by the pandemic, as provided in the sections below.

Figure 4-3: Airport Non-Aeronautical Revenue Breakdown



Source: Airports Council International (ACI), 2018

[16] Tate, Curtis. (August 2020). "COVID-19 pandemic puts airport terminal projects on pause, while others move forward". Available online at: https://www.usatoday.com/story/travel/news/2020/08/20/covid-19-pandemic-puts-airport-terminal-projects-pause-rdu-mci/5616968002/. (Accessed September 2020).

4.4.3.1. Rental Car Companies

Airports are a key market for the rental car industry as out-of-town passengers rely on rental cars for ground transportation to connect to the surrounding community. In many cases, passengers prefer the travel flexibility that rental cars provide which includes placing the time, destination, routing, and vehicle type at the user's discretion. As such, rental car companies largely center their operations around airports with nearly two-thirds of all rental car revenue originating from airport activity.[17] As the activity remained depressed throughout the pandemic, many rental car companies have struggled to stay afloat. Hertz, along with its subsidiaries Dollar, Thrifty, and Firefly, filed for bankruptcy protection on May 22, and 10,000 employees were subsequently laid off in North America alone. In addition, the Avis Budget group has scaled back its new vehicle purchase plans by more than 80 percent in 2020 in response to the industry downturn.[18]

The shock in the rental car industry created a ripple effect felt across several other industries that rely on rental car companies to facilitate business activities. Rental car companies cut back new vehicle purchases and have flooded the used car market, causing auto manufacturers to experience a sales decline resulting from the loss of rental car orders and cuts to new car values. In addition, airports lost revenue from rental car fees since they are not receiving as much activity as anticipated, further impacting the financial position of many airport sponsors.

4.4.3.2. Airport Concessions

Airport concessions include retail shopping and food/beverage services that are located within airport terminals and concourses. These businesses provide added convenience to passengers and stimulate additional economic activity at airports. Retail concessionaires and food and beverage vendors contribute towards an airport's revenue by renting out real estate space within airport terminals and concourses. Some airports also charge an airport concession fee that is applied to customer purchases to generate additional revenue. This fee structure usually includes minimum annual guarantees (MAGs) that tenants pay regardless of business activity levels. Overall concession sales are usually tied to passenger activity at an airport. Unfortunately, the pandemic forced some vendors to scale back and even shut down operations. In response to this, some airports have postponed collection of rental fees and have waived concession fees on a case-by-case basis.[19] Despite this, vendors are still struggling with the operational changes that have been made to limit the spread of the virus. In response to specific recommendations provided by the Center for Disease Control (CDC), airports have adopted several new measures and mandates including social distancing measures, mask mandates, and limitations on occupancy and

[17] Slone, Sean. (June 2020). "Rental Car Company Struggles Could Cause Domino Effect in Related Industries". Available online at: https://web.csg.org/covid19/2020/06/05/rental-car-company-struggles-could-cause-domino-effect-in-related-industries/. (Accessed September 2020).
[18] Isidore, Chris. (May 2020). "The rental car industry has ground to a near halt. This is what that means for automakers and car buyers". Available online at: https://www.cnn.com/2020/05/23/business/hertz-avis-budget-enterprise-covid-19-crisis/index.html. (Accessed September 2020).
[19] Gluck, Alan. (April 2020). "Airport concession fees in the era of COVID-19". Available online at: https://www.icf.com/insights/transportation/airport-concession-fees-covid-19. (Accessed October 2020).

operating hours for retail and food vendors. [20] Despite these safety measures, passengers are largely dissuaded from engaging with these vendors due to fear of contracting the virus.

4.4.3.3. Parking

Airport parking represents a critical component of an airport's ability to facilitate multimodal passenger transportation. Additionally, parking revenues are often one of the largest revenue streams at an airport, sometimes representing more than 50 percent of an airport's revenues, particularly at smaller airports that have fewer onsite business tenants. Parking activity usually reflects the overall passenger traffic levels at an airport, and as a result, many airports have seen dramatic declines in parking revenues since the beginning of the pandemic. However, the decline in parking activity has been beneficial to some airports that have accelerated construction of new or revitalized parking infrastructure.

4.5. Summary

Airports are economic engines that provide service and benefits to the communities they serve and the aviation industry as a whole. Unfortunately, the COVID-19 pandemic has had a tremendous impact on airports, airlines, and associated businesses. As such, this analysis was developed to quantify the decline in the overall economic impacts of Florida's commercial service airport system using the results of the 2019 Florida Statewide Aviation Economic Impact Study and data collected during the outreach process of this project. The resulting economic impact analysis indicates that the Florida airport system experienced significant losses in economic output as a result of the pandemic. However, Florida's 20 commercial service airports remain powerful economic generators that have an immense positive impact on the State and national economy.

[20] Center for Disease Control (CDC). (April 2020). "What Airport Retail or Food Service Workers Need to Know about COVID-19". Available online at: https://www.cdc.gov/coronavirus/2019-ncov/community/airport-retail-factsheet.html. (Accessed September 2020).

Appendix A. Airport Departure Schedule Data Tables

The following section documents changes to number of destinations served, frequency, and available seats at each commercial service airport in Florida. Airports are organized by FDOT district.

A.1.1. District 1 Airports

Table A-1: Southwest Florida International Schedule Data

	January	February	March	April	May	June	July	August	September	October	TOTAL
2019											
No. of Destinations	49	50	50	49	34	32	30	30	29	32	**52**
Frequency	4,024	3,819	4,939	3,986	2,490	2,015	1,922	1,814	1,714	2,211	**28,934**
# of Available Seats	673,306	642,774	839,240	677,499	406,780	326,926	311,801	296,163	83,564	361,140	**4,819,193**
2020											
No. of Destinations	48	47	47	42	30	25	25	25	25	30	**49**
Frequency	4,292	4,380	5,327	1,998	920	1,290	1,850	1,626	1,242	1,962	**24,887**
# of Available Seats	708,346	724,237	891,123	321,576	148,303	198,379	292,404	255,519	190,024	316,062	**4,045,973**
YoY % Change											
No. of Destinations	-2.0%	-6.0%	-6.0%	-14.3%	-11.8%	-21.9%	-16.7%	-16.7%	-13.8%	-6.3%	**-5.8%**
Frequency	6.7%	14.7%	7.9%	-49.9%	-63.1%	-36.0%	-3.7%	-10.4%	-27.5%	-11.3%	**-14.0%**
# of Available Seats	5.2%	12.7%	6.2%	-52.5%	-63.5%	-39.3%	-6.2%	-13.7%	-33.0%	-12.5%	**-16.0%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Table A-2: Punta Gorda Schedule Data

	January	February	March	April	May	June	July	August	September	October	TOTAL
2019											
No. of Destinations	39	40	40	40	34	32	32	32	24	32	**42**
Frequency	422	469	701	589	394	426	451	309	193	384	**4,338**
# of Available Seats	74,400	82,824	123,741	104,064	69,612	75,318	79,722	54,567	34,161	67,968	**766,377**
2020											
No. of Destinations	44	46	46	46	40	37	37	37	31	35	**47**
Frequency	510	657	858	553	351	371	462	376	235	425	**4,798**
# of Available Seats	90,060	115,617	150,690	96,999	61,539	65,394	81,333	66,237	41,448	75,036	**844,353**
YoY % Change											
No. of Destinations	12.8%	15.0%	15.0%	15.0%	17.6%	15.6%	15.6%	15.6%	29.2%	9.4%	**11.9%**
Frequency	20.9%	40.1%	22.4%	-6.1%	-10.9%	-12.9%	2.4%	21.7%	21.8%	10.7%	**10.6%**
# of Available Seats	21.0%	39.6%	21.8%	-6.8%	-11.6%	-13.2%	2.0%	21.4%	21.3%	10.4%	**10.2%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Table A-3: Sarasota/Bradenton Schedule Data

	January	February	March	April	May	June	July	August	September	October	TOTAL
2019											
No. of Destinations	17	19	22	26	23	24	24	23	21	27	**29**
Frequency	712	668	852	798	702	651	645	631	570	692	**6,921**
# of Available Seats	92,555	85,262	109,543	108,136	92,352	84,071	83,336	79,867	76,347	93,619	**905,088**
2020											
No. of Destinations	38	38	38	35	24	19	21	24	22	29	**40**
Frequency	1,078	1,048	1,215	614	343	318	498	549	460	673	**6,796**
# of Available Seats	144,710	139,909	166,325	76,332	44,181	39,911	60,800	69,901	59,639	89,736	**891,444**
YoY % Change											
No. of Destinations	123.5%	100.0%	72.7%	34.6%	4.3%	-20.8%	-12.5%	4.3%	4.8%	7.4%	**37.9%**
Frequency	51.4%	56.9%	42.6%	-23.1%	-51.1%	-51.2%	-22.8%	-13.0%	-19.3%	-2.7%	**-1.8%**
# of Available Seats	56.4%	64.1%	51.8%	-29.4%	-52.2%	-52.5%	-27.0%	-12.5%	-21.9%	-4.1%	**-1.5%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

A.1.2. District 2 Airports

Table A-4: Gainesville Regional Schedule Data

	January	February	March	April	May	June	July	August	September	October	TOTAL
2019											
No. of Destinations	2	3	3	3	3	3	3	3	3	5	**5**
Frequency	304	283	380	403	413	395	394	412	394	416	**3,794**
# of Available Seats	21,931	20,718	24,854	24,569	25,578	23,999	23,628	24,323	24,964	26,351	**240,915**
2020											
No. of Destinations	5	3	3	3	3	3	3	3	3	3	**5**
Frequency	406	376	425	218	152	150	176	215	204	219	**2,541**
# of Available Seats	26,189	24,405	27,406	14,905	11,130	11,070	12,517	15,251	14,943	16,105	**173,921**
YoY % Change											
No. of Destinations	150.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	-40.0%	**0.0%**
Frequency	33.6%	32.9%	11.8%	-45.9%	-63.2%	-62.0%	-55.3%	-47.8%	-48.2%	-47.4%	**-33.0%**
# of Available Seats	19.4%	17.8%	10.3%	-39.3%	-56.5%	-53.9%	-47.0%	-37.3%	-40.1%	-38.9%	**-27.8%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Table A-5: Jacksonville International Schedule Data

	January	February	March	April	May	June	July	August	September	October	TOTAL
2019											
No. of Destinations	28	29	29	30	30	30	30	30	28	29	**36**
Frequency	2,465	2,289	2,766	2,705	2,801	2,750	2,799	2,762	2,525	2,632	**26,494**
# of Available Seats	302,570	288,644	355,398	344,353	350,357	335,554	337,286	336,283	318,749	330,820	**3,300,014**
2020											
No. of Destinations	25	24	27	27	23	25	23	23	17	16	**32**
Frequency	2,242	2,109	2,500	1,153	689	872	1,269	1,334	1,118	1,179	**14,465**
# of Available Seats	279,408	262,905	317,276	150,294	91,678	120,198	179,107	186,243	150,926	161,557	**1,899,592**
YoY % Change											
No. of Destinations	-10.7%	-17.2%	-6.9%	-10.0%	-23.3%	-16.7%	-23.3%	-23.3%	-39.3%	-44.8%	**-11.1%**
Frequency	-9.0%	-7.9%	-9.6%	-57.4%	-75.4%	-68.3%	-54.7%	-51.7%	-55.7%	-55.2%	**-45.4%**
# of Available Seats	-7.7%	-8.9%	-10.7%	-56.4%	-73.8%	-64.2%	-46.9%	-44.6%	-52.7%	-51.2%	**-42.4%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

A.1.3. District 3 Airports

Table A-6: Destin-Fort Walton Beach Schedule Data

	January	February	March	April	May	June	July	August	September	October	TOTAL
2019											
No. of Destinations	11	11	13	12	29	36	36	36	18	15	**36**
Frequency	494	457	664	663	846	1,033	1,077	938	716	705	**7,593**
# of Available Seats	51,485	48,564	68,704	72,614	99,919	132,498	139,061	114,328	79,014	80,275	**886,462**
2020											
No. of Destinations	12	9	14	14	33	37	39	40	26	22	**41**
Frequency	534	499	681	439	399	570	851	906	703	735	**6,317**
# of Available Seats	47,683	44,859	68,424	45,875	50,804	77,920	113,591	115,454	86,669	88,981	**740,260**
YoY % Change											
No. of Destinations	9.1%	-18.2%	7.7%	16.7%	13.8%	2.8%	8.3%	11.1%	44.4%	46.7%	**13.9%**
Frequency	8.1%	9.2%	2.6%	-33.8%	-52.8%	-44.8%	-21.0%	-3.4%	-1.8%	4.3%	**-16.8%**
# of Available Seats	-7.4%	-7.6%	-0.4%	-36.8%	-49.2%	-41.2%	-18.3%	1.0%	9.7%	10.8%	**-16.5%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Table A-7: Northwest Florida Beaches International Schedule Data

	January	February	March	April	May	June	July	August	September	October	TOTAL
2019											
No. of Destinations	7	7	12	12	11	14	14	14	8	8	**14**
Frequency	451	409	581	592	641	653	659	590	576	513	**5,665**
# of Available Seats	49,131	45,497	68,345	69,611	75,627	78,426	80,227	69,814	67,142	61,657	**665,477**
2020											
No. of Destinations	8	8	15	13	9	8	11	11	10	8	**15**
Frequency	476	449	629	466	316	492	781	828	618	616	**5,671**
# of Available Seats	48,763	46,186	67,054	54,272	37,919	62,357	92,742	94,780	70,079	71,276	**645,428**
YoY % Change											
No. of Destinations	14.3%	14.3%	25.0%	8.3%	-18.2%	-42.9%	-21.4%	-21.4%	25.0%	0.0%	**7.1%**
Frequency	5.5%	9.8%	8.3%	-21.3%	-50.7%	-24.7%	18.5%	40.3%	7.3%	20.1%	**0.1%**
# of Available Seats	-0.7%	1.5%	-1.9%	-22.0%	-49.9%	-20.5%	15.6%	35.8%	4.4%	15.6%	**-3.0%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Table A-8: Pensacola International Schedule Data

	January	February	March	April	May	June	July	August	September	October	TOTAL
2019											
No. of Destinations	10	10	11	13	13	16	16	16	14	12	**16**
Frequency	821	757	949	944	1,065	1,133	1,173	1,147	983	967	**9,939**
# of Available Seats	86,183	78,839	99,796	102,168	113,287	122,975	127,307	121,308	106,056	105,680	**1,063,599**
2020											
No. of Destinations	10	10	13	14	13	10	12	12	11	10	**15**
Frequency	874	838	986	642	383	550	843	922	812	782	**7,632**
# of Available Seats	85,713	79,922	92,653	59,254	37,371	59,151	91,412	110,536	96,477	93,467	**805,956**
YoY % Change											
No. of Destinations	0.0%	0.0%	18.2%	7.7%	0.0%	-37.5%	-25.0%	-25.0%	-21.4%	-16.7%	**-6.3%**
Frequency	6.5%	10.7%	3.9%	-32.0%	-64.0%	-51.5%	-28.1%	-19.6%	-17.4%	-19.1%	**-23.2%**
# of Available Seats	-0.5%	1.4%	-7.2%	-42.0%	-67.0%	-51.9%	-28.2%	-8.9%	-9.0%	-11.6%	**-24.2%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Table A-9: Tallahassee International Schedule Data

	January	February	March	April	May	June	July	August	September	October	TOTAL
2019											
No. of Destinations	4	4	4	4	4	4	4	4	4	4	**4**
Frequency	380	342	418	404	472	459	461	475	445	461	**4,317**
# of Available Seats	33,149	30,672	34,884	33,366	38,184	35,614	35,113	36,839	37,295	40,554	**355,670**
2020											
No. of Destinations	4	4	4	4	4	4	4	3	3	3	**4**
Frequency	467	420	448	271	181	180	231	253	266	257	**2,974**
# of Available Seats	37,109	33,884	35,462	21,320	13,813	13,383	17,163	20,463	21,788	21,081	**235,466**
YoY % Change											
No. of Destinations	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	-25.0%	-25.0%	-25.0%	**0.0%**
Frequency	22.9%	22.8%	7.2%	-32.9%	-61.7%	-60.8%	-49.9%	-46.7%	-40.2%	-44.3%	**-31.1%**
# of Available Seats	11.9%	10.5%	1.7%	-36.1%	-63.8%	-62.4%	-51.1%	-44.5%	-41.6%	-48.0%	**-33.8%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

A.1.4. District 4 Airports

Table A-10: Fort Lauderdale/Hollywood International Schedule Data

	January	February	March	April	May	June	July	August	September	October	TOTAL
2019											
No. of Destinations	137	138	138	135	129	128	126	126	123	124	**140**
Frequency	11,431	10,519	12,412	11,383	10,873	10,367	10,577	10,285	8,971	9,560	**106,378**
# of Available Seats	1,861,695	1,711,695	,021,384	1,823,373	1,715,281	1,642,351	1,689,109	1,646,100	1,432,287	1,550,587	**17,093,862**
2020											
No. of Destinations	129	130	131	103	82	70	82	86	81	94	**137**
Frequency	11,785	11,039	11,926	4,451	1,931	2,764	5,209	4,452	3,640	4,941	**62,138**
# of Available Seats	1,983,505	1,855,203	2,008,479	706,542	298,736	447,826	891,761	767,781	621,945	862,077	**10,443,855**
YoY % Change											
No. of Destinations	-5.8%	-5.8%	-5.1%	-23.7%	-36.4%	-45.3%	-34.9%	-31.7%	-34.1%	-24.2%	**-2.1%**
Frequency	3.1%	4.9%	-3.9%	-60.9%	-82.2%	-73.3%	-50.8%	-56.7%	-59.4%	-48.3%	**-41.6%**
# of Available Seats	6.5%	8.4%	-0.6%	-61.3%	-82.6%	-72.7%	-47.2%	-53.4%	-56.6%	-44.4%	**-38.9%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Table A-11: Fort Lauderdale/Hollywood International Frequency Data - Domestic vs International

	February	March	April	May	June	July	August	Total
2019								
Domestic Frequency	7,571	8,971	8,272	7,771	7,283	7,355	7,183	**54,406**
International Frequency	2,948	3,441	3,111	3,102	3,084	3,222	3,102	**22,010**
2020								
Domestic Frequency	8,491	9,361	3,871	1,678	2,597	4,458	3,870	**34,326**
International Frequency	2,548	2,565	580	253	167	751	582	**7,446**
YoY % Change								
Domestic Frequency	12.2%	4.3%	-53.2%	-78.4%	-64.3%	-39.4%	-46.1%	**-36.9%**
International Frequency	-13.6%	-25.5%	-81.4%	-91.8%	-94.6%	-76.7%	-81.2%	**-66.2%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Table A-12: Vero Beach Schedule Data

	January	February	March	April	May	June	July	August	September	October	TOTAL
2019											
No. of Destinations	1	1	1	1	3	3	3	3	3	2	**3**
Frequency	10	8	9	17	23	26	25	27	16	13	**174**
# of Available Seats	500	400	450	850	1,150	1,300	1,250	1,350	820	650	**8,720**
2020											
No. of Destinations	2	1	1	1	1	1	2	2	2	2	**2**
Frequency	10	9	9	13	9	9	14	11	8	13	**105**
# of Available Seats	620	490	490	650	450	450	700	550	400	650	**5,450**
YoY % Change											
No. of Destinations	100.0%	0.0%	0.0%	0.0%	-66.7%	-66.7%	-33.3%	-33.3%	-33.3%	0.0%	**-33.3%**
Frequency	0.0%	12.5%	0.0%	-23.5%	-60.9%	-65.4%	-44.0%	-59.3%	-50.0%	0.0%	**-39.7%**
# of Available Seats	24.0%	22.5%	8.9%	-23.5%	-60.9%	-65.4%	-44.0%	-59.3%	-51.2%	0.0%	**-37.5%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Table A-13: West Palm Beach International Schedule Data

	January	February	March	April	May	June	July	August	September	October	TOTAL
2019											
No. of Destinations	28	27	30	29	21	20	19	19	19	22	**32**
Frequency	2,614	2,488	3,004	2,749	2,080	1,828	1,806	1,756	1,649	1,899	**21,873**
# of Available Seats	397,612	381,765	470,621	428,658	314,632	274,429	271,574	266,939	259,968	298,769	**3,364,967**
2020											
No. of Destinations	30	32	33	30	21	19	21	19	16	21	**35**
Frequency	2,855	2,777	3,136	1,111	443	622	933	797	662	1,004	**14,340**
# of Available Seats	453,348	443,896	502,368	171,266	67,940	96,273	147,104	127,003	100,420	161,559	**2,271,177**
YoY % Change											
No. of Destinations	7.1%	18.5%	10.0%	3.4%	0.0%	-5.0%	10.5%	0.0%	-15.8%	-4.5%	**9.4%**
Frequency	9.2%	11.6%	4.4%	-59.6%	-78.7%	-66.0%	-48.3%	-54.6%	-59.9%	-47.1%	**-34.4%**
# of Available Seats	14.0%	16.3%	6.7%	-60.0%	-78.4%	-64.9%	-45.8%	-52.4%	-61.4%	-45.9%	**-32.5%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

A.1.5. District 5 Airports

Table A-14: Daytona Beach International Schedule Data

	January	February	March	April	May	June	July	August	September	October	TOTAL
2019											
No. of Destinations	3	2	2	2	4	3	3	3	3	2	**5**
Frequency	260	241	333	301	283	276	279	277	256	269	**2,775**
# of Available Seats	29,632	27,198	38,428	35,080	33,433	32,299	32,685	32,090	29,889	31,490	**322,224**
2020											
No. of Destinations	3	4	3	3	2	2	2	3	2	2	**5**
Frequency	302	295	323	179	97	93	163	216	209	204	**2,081**
# of Available Seats	33,137	32,373	36,036	18,909	9,843	8,229	16,436	21,327	19,847	19,448	**215,585**
YoY % Change											
No. of Destinations	0.0%	100.0%	50.0%	50.0%	-50.0%	-33.3%	-33.3%	0.0%	-33.3%	0.0%	**0.0%**
Frequency	16.2%	22.4%	-3.0%	-40.5%	-65.7%	-66.3%	-41.6%	-22.0%	-18.4%	-24.2%	**-25.0%**
# of Available Seats	11.8%	19.0%	-6.2%	-46.1%	-70.6%	-74.5%	-49.7%	-33.5%	-33.6%	-38.2%	**-33.1%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Table A-15: Melbourne International Schedule Data

	January	February	March	April	May	June	July	August	September	October	TOTAL
2019											
No. of Destinations	8	7	7	7	5	4	5	4	3	3	**11**
Frequency	227	211	274	223	226	225	228	229	198	211	**2,252**
# of Available Seats	24,962	23,310	28,776	22,660	23,928	21,305	21,129	21,250	19,560	21,238	**228,118**
2020											
No. of Destinations	3	3	3	3	2	3	2	2	2	3	**4**
Frequency	270	252	274	161	92	64	125	139	120	165	**1,662**
# of Available Seats	27,816	26,179	28,712	15,035	8,236	5,878	11,465	12,331	11,061	14,373	**161,086**
YoY % Change											
No. of Destinations	-62.5%	-57.1%	-57.1%	-57.1%	-60.0%	-25.0%	-60.0%	-50.0%	-33.3%	0.0%	**-63.6%**
Frequency	18.9%	19.4%	0.0%	-27.8%	-59.3%	-71.6%	-45.2%	-39.3%	-39.4%	-21.8%	**-26.2%**
# of Available Seats	11.4%	12.3%	-0.2%	-33.6%	-65.6%	-72.4%	-45.7%	-42.0%	-43.5%	-32.3%	**-29.4%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Table A-16: Orlando International Schedule Data

	January	February	March	April	May	June	July	August	September	October	TOTAL
2019											
No. of Destinations	142	141	143	143	136	137	136	133	126	127	**151**
Frequency	13,588	12,450	15,115	13,931	13,638	13,386	14,002	13,148	11,416	12,688	**133,362**
# of Available Seats	2,370,314	2,174,396	2,613,097	2,424,726	2,370,564	2,328,465	2,446,863	2,320,537	2,016,506	2,227,597	**23,293,065**
2020											
No. of Destinations	137	135	136	102	74	69	74	70	68	77	**143**
Frequency	14,299	13,758	15,198	6,282	3,178	4,699	7,400	6,477	5,223	6,736	**83,250**
# of Available Seats	2,505,748	2,416,999	2,685,823	1,034,348	517,172	771,214	1,253,609	1,113,881	891,093	1,154,345	**14,344,232**
YoY % Change											
No. of Destinations	-3.5%	-4.3%	-4.9%	-28.7%	-45.6%	-49.6%	-45.6%	-47.4%	-46.0%	-39.4%	**-5.3%**
Frequency	5.2%	10.5%	0.5%	-54.9%	-76.7%	-64.9%	-47.2%	-50.7%	-54.2%	-46.9%	**-37.6%**
# of Available Seats	5.7%	11.2%	2.8%	-57.3%	-78.2%	-66.9%	-48.8%	-52.0%	-55.8%	-48.2%	**-38.4%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Table A-17: Orlando International Frequency Data - Domestic vs International

	February	March	April	May	June	July	August	Total
2019								
Domestic Frequency	10,727	13,086	12,069	11,908	11,687	12,144	11,366	**82,987**
International Frequency	1,723	2,029	1,862	1,730	1,699	1,858	1,782	**12,683**
2020								
Domestic Frequency	12,241	13,701	6,074	3,080	4,658	7,260	6,366	**53,380**
International Frequency	1,517	1,497	208	98	41	140	111	**3,612**
YoY % Change								
Domestic Frequency	14.1%	4.7%	-49.7%	2.0%	-60.1%	-40.2%	-44.0%	**-35.7%**
International Frequency	-12.0%	-26.2%	-88.8%	-94.3%	-97.6%	-92.5%	-93.8%	**-71.5%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Table A-18: Orlando Sanford International Schedule Data

	January	February	March	April	May	June	July	August	September	October	TOTAL
2019											
No. of Destinations	67	68	74	72	80	83	78	79	58	67	**91**
Frequency	740	831	1,190	1,076	1,026	1,169	1,202	843	542	857	**9,476**
# of Available Seats	118,471	135,013	190,617	179,278	172,735	192,661	202,067	145,913	97,359	149,115	**1,583,229**
2020											
No. of Destinations	63	63	64	64	74	69	70	70	48	52	**81**
Frequency	760	891	1,188	837	667	755	874	734	369	630	**7,705**
# of Available Seats	127,191	148,446	197,004	139,665	113,031	124,479	150,617	126,418	62,618	106,806	**1,296,275**
YoY % Change											
No. of Destinations	-6.0%	-7.4%	-13.5%	-11.1%	-7.5%	-16.9%	-10.3%	-11.4%	-17.2%	-22.4%	**-11.0%**
Frequency	2.7%	7.2%	-0.2%	-22.2%	-35.0%	-35.4%	-27.3%	-12.9%	-31.9%	-26.5%	**-18.7%**
# of Available Seats	7.4%	9.9%	3.4%	-22.1%	-34.6%	-35.4%	-25.5%	-13.4%	-35.7%	-28.4%	**-18.1%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

A.1.6. District 6 Airports

Table A-19: Miami International Schedule Data

	January	February	March	April	May	June	July	August	September	October	TOTAL
2019											
No. of Destinations	161	161	163	157	147	149	148	148	149	149	**171**
Frequency	13,837	12,402	13,761	12,225	12,441	12,323	12,906	12,668	11,138	11,614	**125,315**
# of Available Seats	2,263,248	2,020,196	2,234,048	1,973,028	1,971,107	1,944,905	2,038,705	2,014,649	1,805,589	1,905,799	**20,171,274**
2020											
No. of Destinations	156	159	156	100	72	74	93	91	91	117	**166**
Frequency	13,605	12,735	12,696	4,274	1,853	3,088	5,166	4,378	3,809	5,173	**66,777**
# of Available Seats	2,228,540	2,088,620	2,038,733	590,992	290,752	446,821	761,422	669,204	597,929	846,084	**10,559,097**
YoY % Change											
No. of Destinations	-3.1%	-1.2%	-4.3%	-36.3%	-51.0%	-50.3%	-37.2%	-38.5%	-38.9%	-21.5%	**-2.9%**
Frequency	-1.7%	2.7%	-7.7%	-65.0%	-85.1%	-74.9%	-60.0%	-65.4%	-65.8%	-55.5%	**-46.7%**
# of Available Seats	-1.5%	3.4%	-8.7%	-70.0%	-85.2%	-77.0%	-62.7%	-66.8%	-66.9%	-55.6%	**-47.7%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Table A-20: Miami International Frequency Data - Domestic vs International

	February	March	April	May	June	July	August	Total
2019								
Domestic Frequency	6,556	7,395	6,560	6,784	6,529	6,763	6,684	**47,271**
International Frequency	5,846	6,366	5,665	5,657	5,794	6,143	5,984	**41,455**
2020								
Domestic Frequency	7,310	7,772	3,640	1,545	2,719	4,294	3,353	**30,633**
International Frequency	5,425	4,924	634	308	369	872	1,025	**13,557**
YoY % Change								
Domestic Frequency	11.5%	5.1%	-44.5%	-77.2%	-58.4%	-36.5%	-49.8%	**-35.2%**
International Frequency	-7.2%	-22.7%	-88.8%	-94.6%	-93.6%	-85.8%	-82.9%	**-67.3%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Table A-21: Key West International Schedule Data

	January	February	March	April	May	June	July	August	September	October	TOTAL
2019											
No. of Destinations	6	7	8	8	8	8	8	8	6	7	**8**
Frequency	415	396	502	414	311	277	279	260	218	267	**3,339**
# of Available Seats	35,279	33,196	42,784	36,224	28,971	27,560	28,404	25,822	21,800	25,854	**305,894**
2020											
No. of Destinations	8	9	9	9	6	6	6	6	5	7	**9**
Frequency	588	579	629	311	134	183	247	261	237	339	**3,508**
# of Available Seats	51,203	49,776	53,323	26,669	12,054	17,364	24,632	27,208	25,572	34,360	**322,161**
YoY % Change											
No. of Destinations	33.3%	28.6%	12.5%	12.5%	-25.0%	-25.0%	-25.0%	-25.0%	-16.7%	0.0%	**12.5%**
Frequency	41.7%	46.2%	25.3%	-24.9%	-56.9%	-33.9%	-11.5%	0.4%	8.7%	27.0%	**5.1%**
# of Available Seats	45.1%	49.9%	24.6%	-26.4%	-58.4%	-37.0%	-13.3%	5.4%	17.3%	32.9%	**5.3%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

A.1.7. District 7 Airports

Table A-22: Tampa International Schedule Data

	January	February	March	April	May	June	July	August	September	October	TOTAL
2019											
No. of Destinations	78	78	79	79	69	66	66	67	64	67	**84**
Frequency	6,678	6,108	7,754	7,105	6,423	6,150	6,306	5,883	5,177	5,885	**63,469**
# of Available Seats	1,101,469	1,006,236	1,263,558	1,162,867	1,036,106	983,572	1,011,792	948,259	837,039	946,301	**10,297,199**
2020											
No. of Destinations	74	74	75	63	47	39	42	45	42	45	**77**
Frequency	6,851	6,665	7,939	3,744	1,698	2,363	3,799	3,577	2,664	3,298	**42,598**
# of Available Seats	1,135,444	1,106,657	1,315,416	589,523	262,379	375,829	614,768	578,219	425,718	538,313	**6,942,266**
YoY % Change											
No. of Destinations	-5.1%	-5.1%	-5.1%	-20.3%	-31.9%	-40.9%	-36.4%	-32.8%	-34.4%	-32.8%	**-8.3%**
Frequency	2.6%	9.1%	2.4%	-47.3%	-73.6%	-61.6%	-39.8%	-39.2%	-48.5%	-44.0%	**-32.9%**
# of Available Seats	3.1%	10.0%	4.1%	-49.3%	-74.7%	-61.8%	-39.2%	-39.0%	-49.1%	-43.1%	**-32.6%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Table A-23: Tampa International Frequency Data - Domestic vs International

	February	March	April	May	June	July	August	Total
2019								
Domestic Frequency	5,815	7,373	6,747	6,137	5,879	6,014	5,607	**43,572**
International Frequency	293	381	358	286	271	292	276	**2,157**
2020								
Domestic Frequency	6,350	7,621	3,708	1,695	2,363	3,781	3,575	**29,093**
International Frequency	315	318	36	3	-	18	2	**692**
YoY % Change								
Domestic Frequency	9.2%	3.4%	-45.0%	-72.4%	-59.8%	-37.1%	-36.2%	**-33.2%**
International Frequency	7.5%	-16.5%	-89.9%	-99.0%	-100.0%	-93.8%	-99.3%	**-67.9%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020

Table A-24: St. Pete-Clearwater International Schedule Data

	January	February	March	April	May	June	July	August	September	October	TOTAL
2019											
No. of Destinations	53	52	56	54	52	53	52	50	43	44	**67**
Frequency	562	568	777	724	686	766	806	606	426	606	**6,527**
# of Available Seats	96,972	97,713	132,341	123,380	115,728	126,862	133,439	100,458	73,631	102,978	**1,103,502**
2020											
No. of Destinations	48	52	53	52	51	51	51	52	42	43	**57**
Frequency	584	658	886	639	533	594	713	624	361	529	**6,121**
# of Available Seats	102,279	114,750	153,259	111,054	93,963	103,437	126,180	110,152	63,099	91,281	**1,069,454**
YoY % Change											
No. of Destinations	-9.4%	0.0%	-5.4%	-3.7%	-1.9%	-3.8%	-1.9%	4.0%	-2.3%	-2.3%	**-14.9%**
Frequency	3.9%	15.8%	14.0%	-11.7%	-22.3%	-22.5%	-11.5%	3.0%	-15.3%	-12.7%	**-6.2%**
# of Available Seats	5.5%	17.4%	15.8%	-10.0%	-18.8%	-18.5%	-5.4%	9.6%	-14.3%	-11.4%	**-3.1%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2020