



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

COMMERCIAL SERVICE AIRPORTS

Executive Summary | DECEMBER 2020

The novel coronavirus (COVID-19) pandemic disrupted the lives of billions of people and caused the global aviation industry to experience its most substantial downturn ever in 2020. Given this, the Florida Department of Transportation (FDOT) Aviation Office determined that it was important to document the ongoing impacts of the pandemic to commercial service airports and postulate possible trends, economic changes, and recovery scenarios.

The FDOT Aviation Office collaborated with representatives from Florida's 20 commercial service airports to gather data related to changes in airport passenger traffic, operations, revenues, and staffing; as well as the status of existing and future capital development projects and funding. This analysis also utilized data from a variety of global industry organizations, including the Official Airline Guide (OAG), a global transportation data provider which provided data related to airline flight frequencies between airports and interstate and international destinations served from each of Florida's commercial service airports.

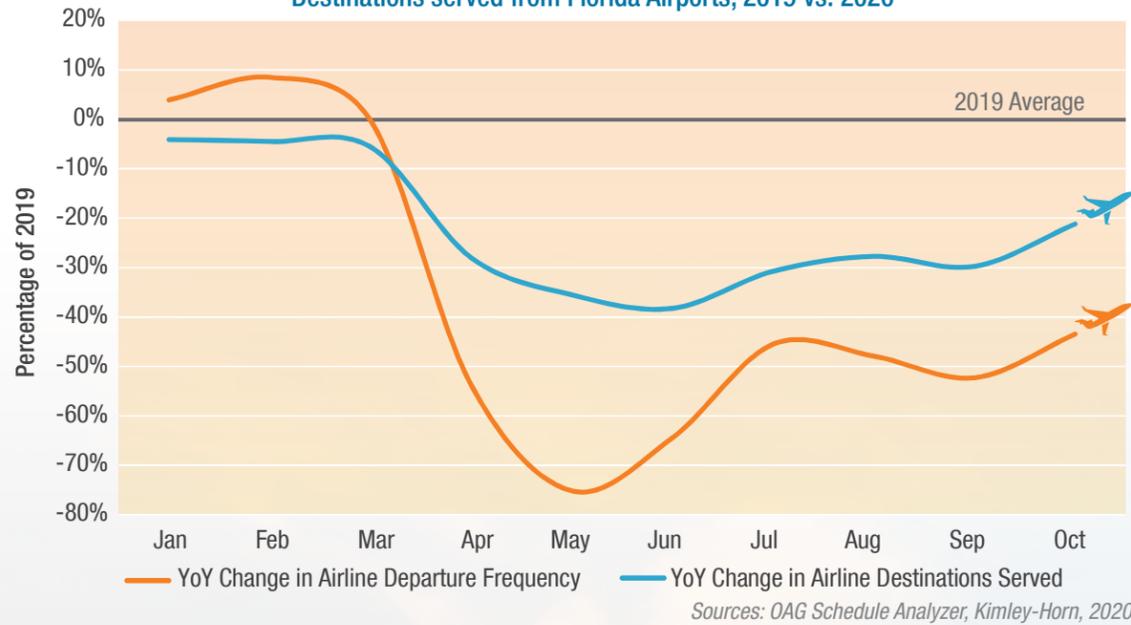
The resulting analysis used these airport- and industry-reported data to develop recovery forecasts of passenger traffic levels at each commercial service airport in the state. These forecasts were then used to estimate the change in economic impact of the State's commercial service airport system due to COVID-19 based on the findings of the 2019 Florida Statewide Aviation Economic Impact Study (EIS).

AIRLINE SCHEDULE DATA

An analysis was conducted to evaluate monthly scheduled interstate departure frequency and the number of airline destinations served to identify changes in commercial passenger service due to the COVID-19 pandemic.

The following chart illustrates the year-over-year (YoY) statewide changes in international and domestic airline departure frequencies and the number of airline destinations served between January through October 2019 and 2020. In total, airline flight frequencies declined statewide by 36.1 percent between 2019 and 2020. Additionally, Florida's commercial service airports served 101 fewer destinations in 2020 than compared to 2019.

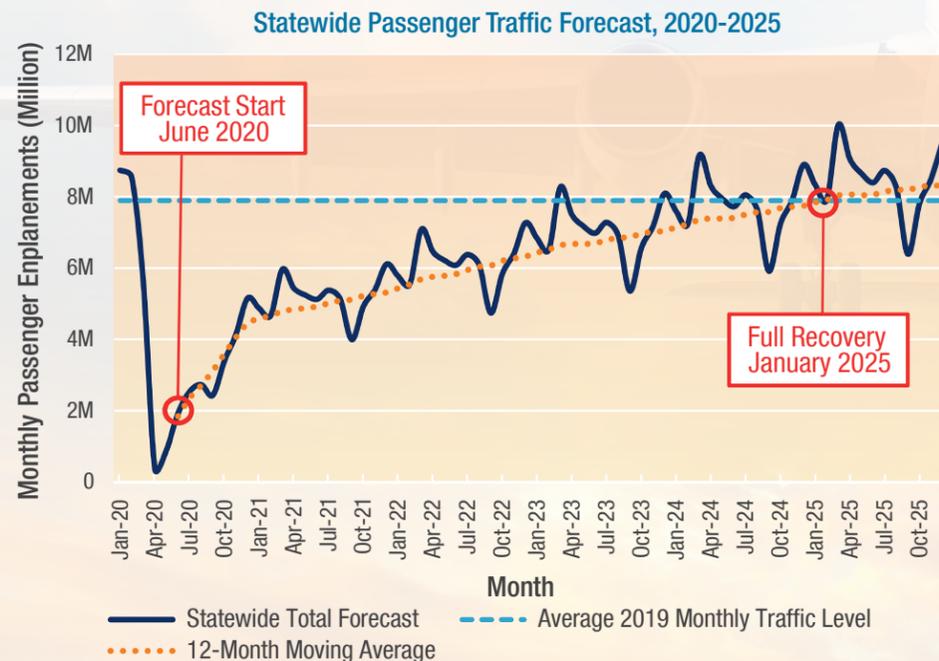
Interstate and International Airline Departure Frequency and Airline Destinations served from Florida Airports, 2019 vs. 2020



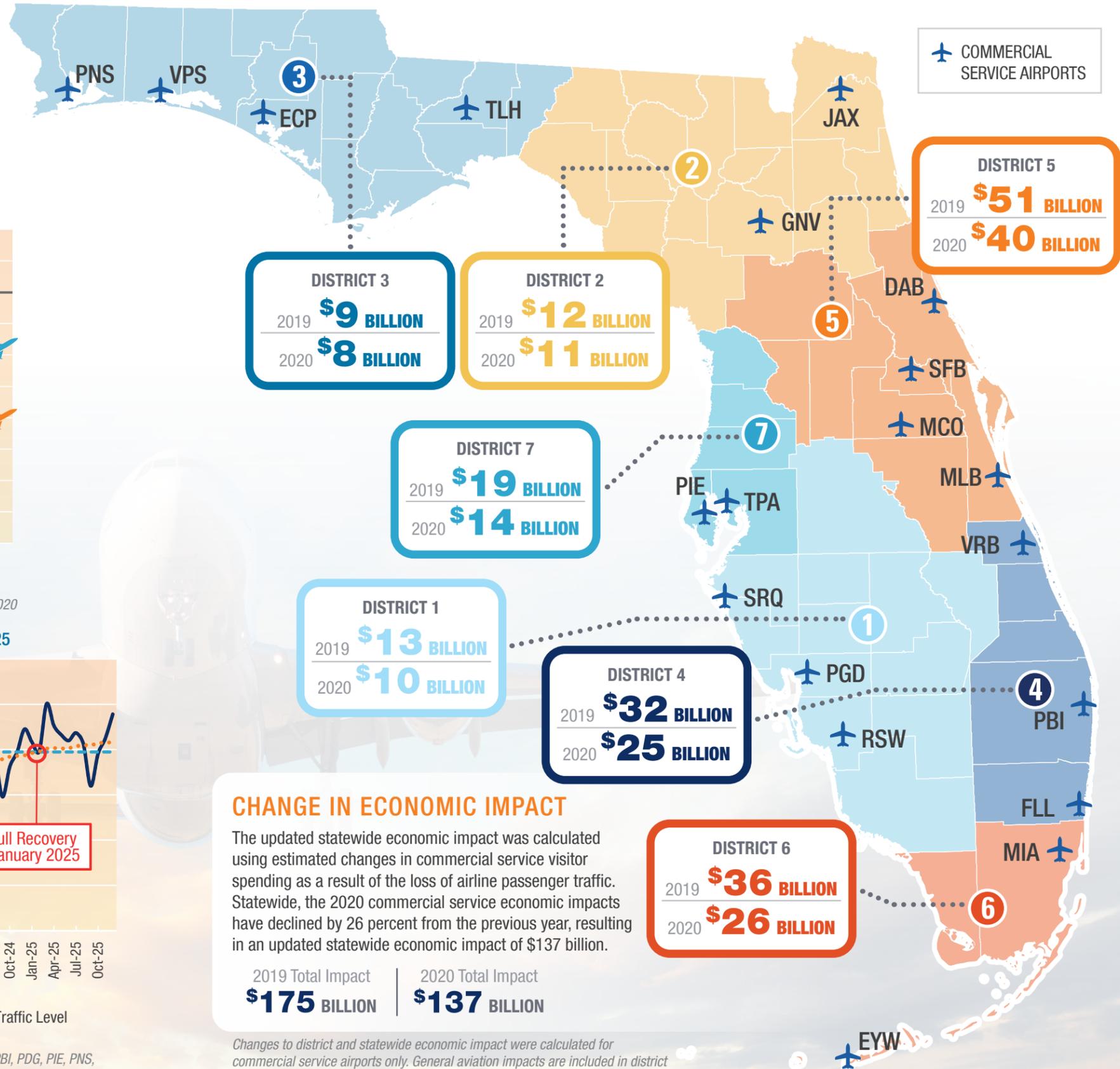
Sources: OAG Schedule Analyzer, Kimley-Horn, 2020

PASSENGER TRAFFIC FORECASTS

Using passenger traffic data from the U.S. Bureau of Transportation Statistics (BTS), recovery projections reported by Florida airport representatives, and recovery scenarios developed by industry organizations, short term passenger traffic forecasts were developed for each of Florida's commercial service airports. Statewide, average annual passenger traffic levels are not expected to recover to average 2019 traffic levels until January 2025. This recovery date is approximately 12 months behind the projected national recovery date, primarily due to the large presence of international airline traffic at the State's four large hub airports.



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



CHANGE IN ECONOMIC IMPACT

The updated statewide economic impact was calculated using estimated changes in commercial service visitor spending as a result of the loss of airline passenger traffic. Statewide, the 2020 commercial service economic impacts have declined by 26 percent from the previous year, resulting in an updated statewide economic impact of \$137 billion.

2019 Total Impact | 2020 Total Impact
\$175 BILLION | **\$137 BILLION**

Changes to district and statewide economic impact were calculated for commercial service airports only. General aviation impacts are included in district and statewide totals but were not updated as part of this analysis.

Executive Summary

AIRPORT PANDEMIC RESPONSE

Despite the tremendous repercussions from the pandemic, Florida's commercial service airport system remains fully operational, thanks in large part to the quick and effective response by airport sponsors and staff. All 20 commercial service airports have implemented pandemic safety plans to protect airport customers and staff and mitigate the spread of COVID-19. Each airport's safety plan is tailored to their respective community's needs and requirements, however, most airports incorporated similar elements that have proven effective.

Every airport implemented a variety of safety and cleaning procedures. The most common were the use of electrostatic sprayers, installation of social-distancing signage and barriers, as well as requirements for all passengers and staff to wear facial coverings. Other actions taken by airports include conducting health screenings for either staff or passengers, installing enhanced air filtration systems, and partnering with other health and safety organizations to improve airport sanitization. These actions have been effective in restoring passenger confidence, which will be critical to the aviation industry's timely and complete recovery.

Airports have also implemented plans to remain financially stable during the pandemic and going forward as the industry recovers to pre-crisis levels. Several airports have halted discretionary spending, delayed capital improvement projects and equipment purchases, and reduced operating budgets; all while maintaining operational capability and retaining most airport staff. However, some airports are utilizing the down period to improve their facilities to meet demand, further ensuring that Florida's commercial service airport system will serve the needs of users for many years to come.

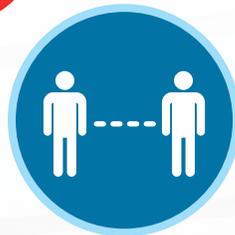
AIRPORT SAFETY PLANS



FACE MASK
REQUIREMENTS



ENHANCED CLEANING
PROCEDURES



SOCIAL DISTANCING
SIGNAGE



EMPLOYEE HEALTH
SCREENINGS



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