FDOT AVIATION

FLORIDA DEPARTMENT OF TRANSPORTATION

FLORIDA'S RESPONSE TO COVID-19

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

COMMERCIAL SERVICE AIRPORTS

YEAR-END 2021 UPDATE

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Chapter 1. Airport Outreach

Two years after the emergence of the novel coronavirus (COVID-19) in early 2020, the worldwide economy is still recovering from the unprecedented downturn caused by the pandemic. The global aviation industry has been particularly affected due to global travel restrictions, shifts in consumer behaviors, and larger economic patterns. Florida's aviation industry was similarly impacted during the first few months of the pandemic, prompting the Florida Department of Transportation (FDOT) Aviation Office (AO) to initiate a study in mid-2020 to document the effects (the Fall 2020 Study). This study included outreach to the 20 commercial service airports in Florida to gather quantitative data and anecdotal information about the pandemic's immediate effects on airports, airlines, and on-airport businesses.

In the early stages of the pandemic, rapidly shifting economic and social conditions made it difficult to capture the true effects of the pandemic and predict how the world will recover from the crisis. As such, the FDOT AO elected to update the Fall 2020 Study in the summer of 2021 to provide a renewed analysis of the pandemic 18 months after its emergence. This update, called the Summer 2021 Update, used new airline and passenger traffic data to update the airline flight schedules analysis, passenger traffic forecasts, and economic impact analysis. In the six months since the writing of the Summer 2021 Update, developments, such as the emergence of the Delta and Omicron COVID-19 variants have greatly changed the current state and future outlook of the aviation industry. Given this, the FDOT AO commissioned this study as a second update to the Fall 2020 Study. This analysis, the Year End 2021 Study, provides an entirely new analysis of the COVID-19 pandemic's effects on the Florida commercial service aviation industry as of the end of 2021. This study covers the following topics in this and the following chapters:

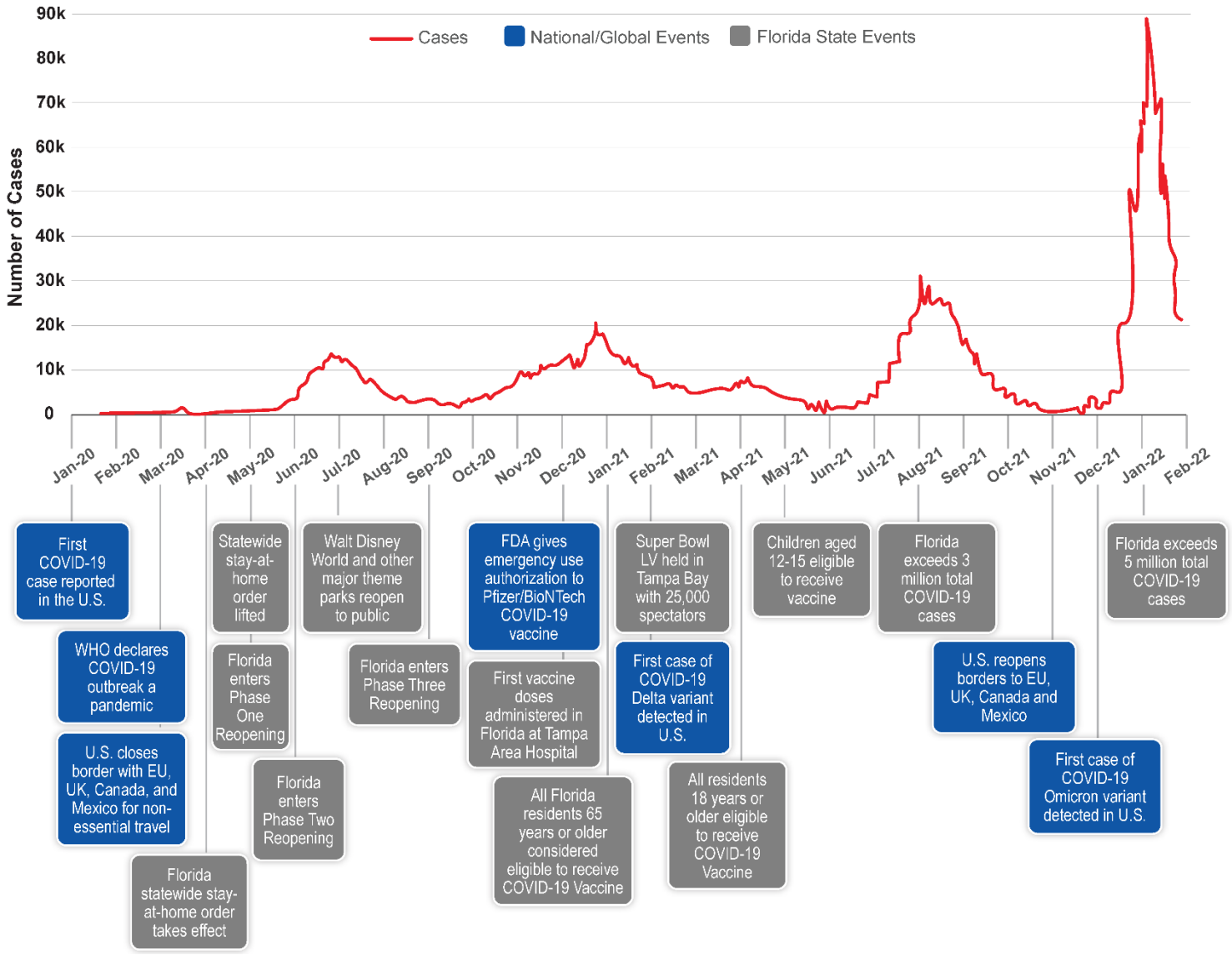
- Airport Outreach
- Airline Schedule Analysis
- Airport Passenger Traffic Forecasts
- Statewide Commercial Aviation Economic Impact Study

1.1. Overview of the COVID-19 Pandemic

On January 7, 2020, the SARS-CoV-2 strain of coronavirus (commonly referred to as COVID-19) was identified during an outbreak in the city of Wuhan, Hubei Province, China. The new virus spread quickly, reaching the United States (U.S.) by January 21. The first COVID-19 cases in Florida were reported in Hillsborough and Manatee counties on March 1. Major outbreaks occurred around the globe in February and March 2020, prompting the World Health Organization (WHO) to declare COVID-19 a pandemic on March 11, 2020.

Since the declaration, the pandemic has transformed many aspects of our daily lives and is likely to do so for the foreseeable future. Through the course of the pandemic, numerous state, national, and global restrictions have begun and ended to help minimize the spread and impacts associated with the virus. Though still impacted by travel restrictions outside the state, Florida has remained open for business and continues to emerge from the pandemic stronger than before. **Figure 1-1** presents a summary of the number of daily new cases reported in Florida since the start of the COVID-19 pandemic and a timeline of major related events at the state and national level.

Figure 1-1: Florida COVID-19 Cases and Timeline of Major Events



Sources: Johns-Hopkins University Coronavirus Resource Center, Kimley-Horn

1.2. Impacts to Commercial Aviation Industry

The economic downturn caused by the COVID-19 pandemic affected all industries, including the aviation sector, as restrictions sent many workers home and limited the movement of people and goods. As airline and passenger traffic often represent a large source of revenues for commercial service airports, the vitality of the airport industry is highly dependent on the operations and actions of the airline industry. Therefore, this section examines the events and trends that affected the airline industry since the start of the pandemic and discusses the current state of the industry as of January 2022.

1.2.1. Airline Traffic

Airlines rely on passenger and cargo traffic to generate a substantial portion of operating revenues. The following subsections discuss changes in national and global passenger enplanements, airline passenger load factors, shifts in airline consumer trends, and changes in air cargo traffic.

1.2.1.1. National Passenger Traffic Comparison

The years leading up to the pandemic were a period of strong growth for the U.S. airline industry, as total annual passenger enplanements increased by an average of 4.3 percent per year between 2014 and 2019. Upon the WHO declaration of the pandemic in March 2020, both domestic and international passenger enplanements in the U.S. declined by half as airlines and passengers canceled flights. April brought even more cancellations as airlines parked aircraft fleets and passenger enplanements dropped to 3.2 million nationwide—96% less than March 2019 and the lowest number recorded since the U.S. Bureau of Transportation Statistics (BTS) began recording data in February 1975. As shown in **Figure 1-2**, the path to recovery from April 2020 until now has not been rapid but has been consistent. As of October 2021, the latest month of available BTS data, U.S. domestic passenger enplanements are 13.5 percent lower than 2019 while international traffic is 55 percent lower.

Figure 1-2: U.S. National Passenger Enplanements, 2020-2021

Domestic, International, and Total Passenger Enplanements vs. Same Month 2019

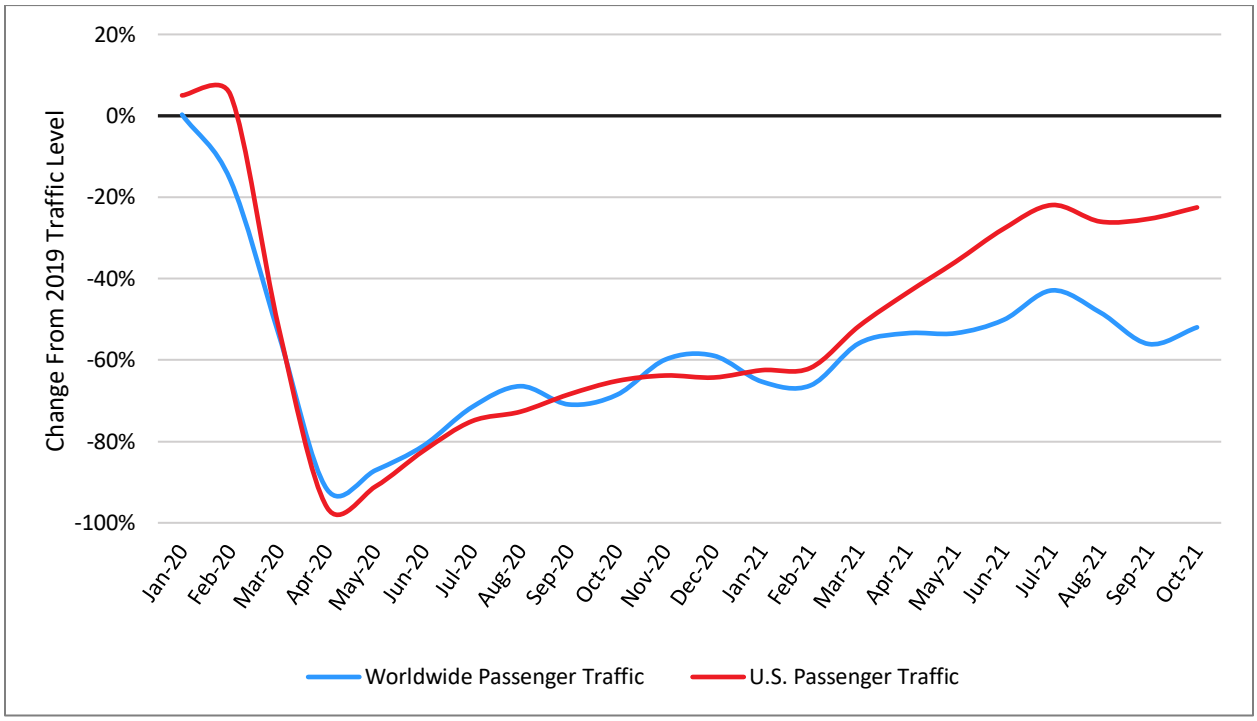
Source: U.S. Bureau of Transportation Statistics

1.2.1.2. Global Passenger Traffic Comparison

In comparison to the rest of the world, passenger traffic in the U.S. has been strong since the low point in traffic in April 2020. As shown in **Figure 1-3,** global passenger traffic declined earlier than the U.S. in early 2020 due to outbreaks in China and Europe. Both U.S. and global traffic levels rebounded through 2020; however, global traffic growth slowed in 2021 while levels in the U.S. continued to grow and improve. As of October 2021, global passenger traffic levels were 52 percent less than 2019—29 percent lower than U.S. passenger traffic levels.

Figure 1-3: Global Passenger Traffic vs. U.S. Passenger Enplanements, 2020-2021

Total Passenger Enplanements vs. Same Month 2019



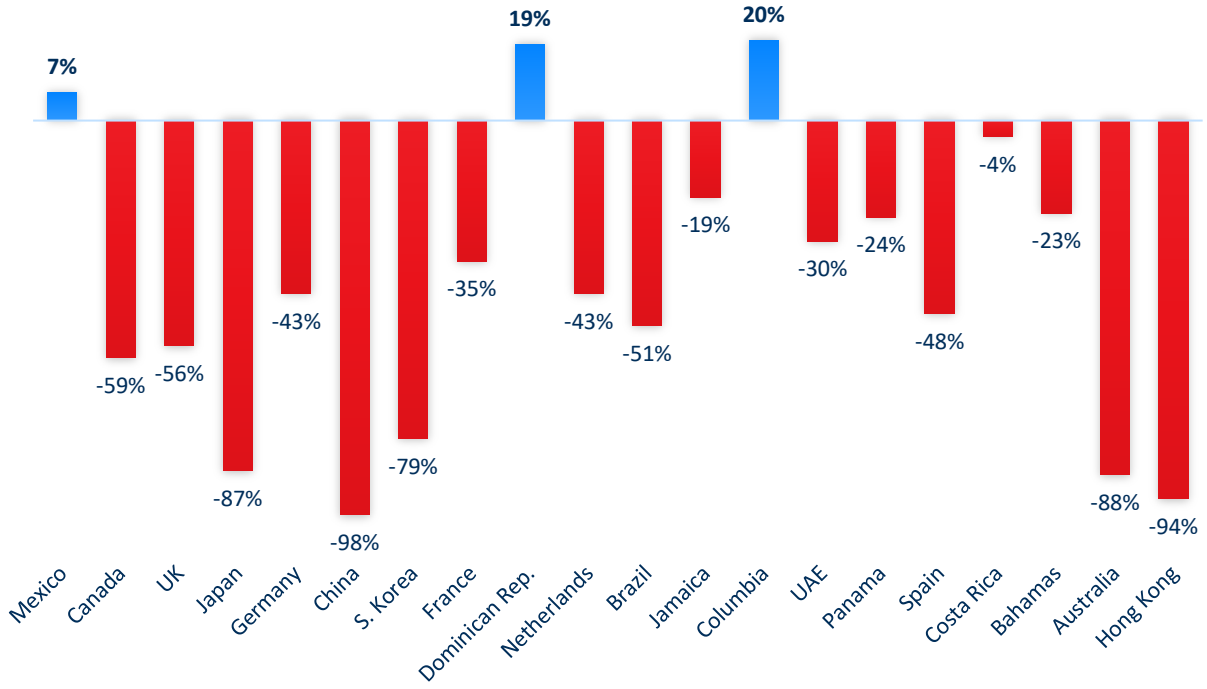
Sources: ICAO, U.S. Bureau of Transportation Statistics

1.2.1.3. Global Passenger Traffic Comparison – Top 20 Country Pairs from U.S.

While international air traffic is down as a whole, some countries have recovered more quickly than others, highlighting the regionality of the pandemic. As shown in **Figure 1-4**, passenger air traffic in December 2021 was still down as much as 98 percent in China and east Asia compared to December 2019. Meanwhile, other countries, such as Mexico, Dominican Republic, and Columbia have actually increased passenger traffic volumes since 2019.

Passenger traffic between the U.S. and central and south American countries is comprised of primarily leisure traffic, which may explain the strong performance in these regions compared to business-oriented regions, such as Europe and Asia. Among Florida's commercial service airports, the most common country destinations include Mexico, Panama, Cuba, and the Bahamas. Therefore, the strong performance in these markets may be a reason Florida's commercial service airports continue their strong recovery. An in-dept analysis of airline schedules from Florida airports is discussed in **Chapter 2.**

Figure 1-4: Percent Change in Passenger Traffic in December 2021 vs. 2019
Top 20 Country Pairs from U.S.



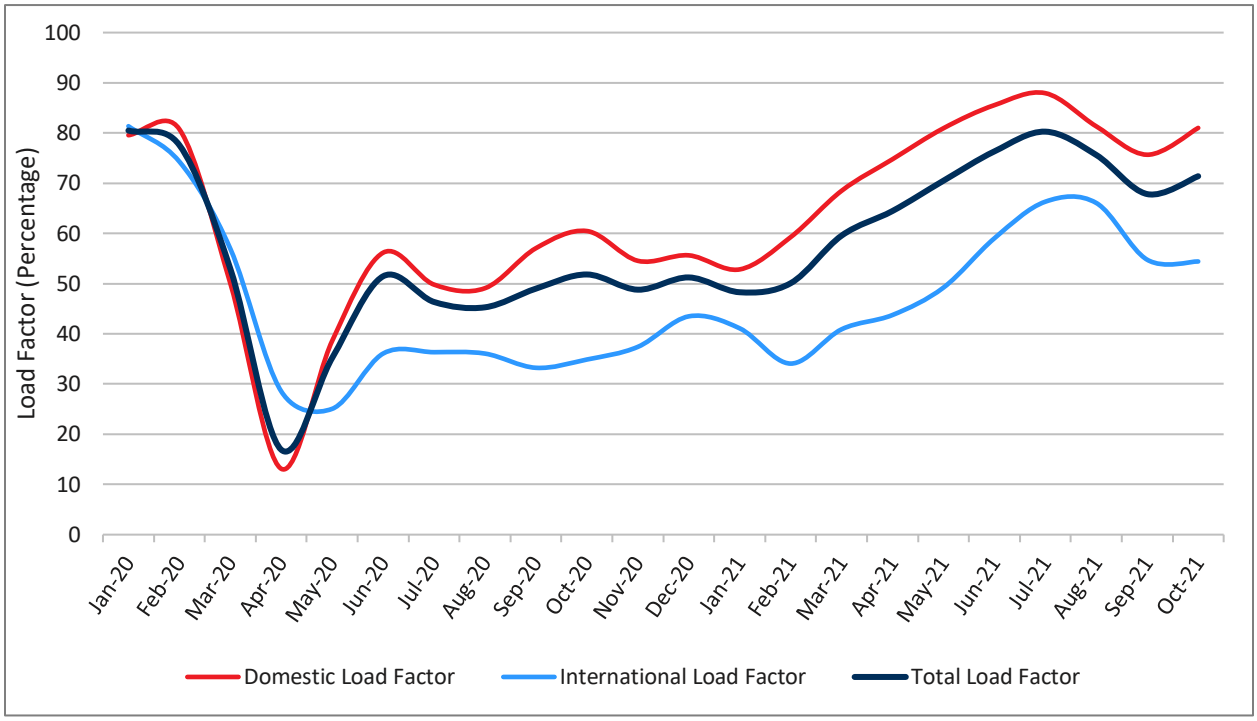
Source: Airlines for America

1.2.1.4. U.S. Load Factor Comparison

Load factor is another metric that is widely used to evaluate air traffic as it represents the proportion of total available seats compared to revenue passengers carried on each flight, expressed as a percentage. Load factor provides a useful comparison between the number of flights occurring, the size of aircraft being operated, and the number of passengers being served. Between 2002 and 2019, the average load factor on a domestic flight in the U.S. was 81.1 percent and 79.5 percent on an international flight, combining to an 80.3 percent average load factor on all flights (international plus domestic).

Figure 1-5 illustrates the month-to-month changes in U.S. passenger airline load factors between 2020 and 2021. As a comparative metric, load factors have varied significantly throughout the pandemic showing more volatility as airlines sought to appropriately match travel demand and routes with aircraft configuration.

Figure 1-5: U.S. Passenger Airline Load Factor, 2020-2021



Source: U.S. Bureau of Transportation Statistics

1.2.1.5. Business vs. Leisure Travel Comparison

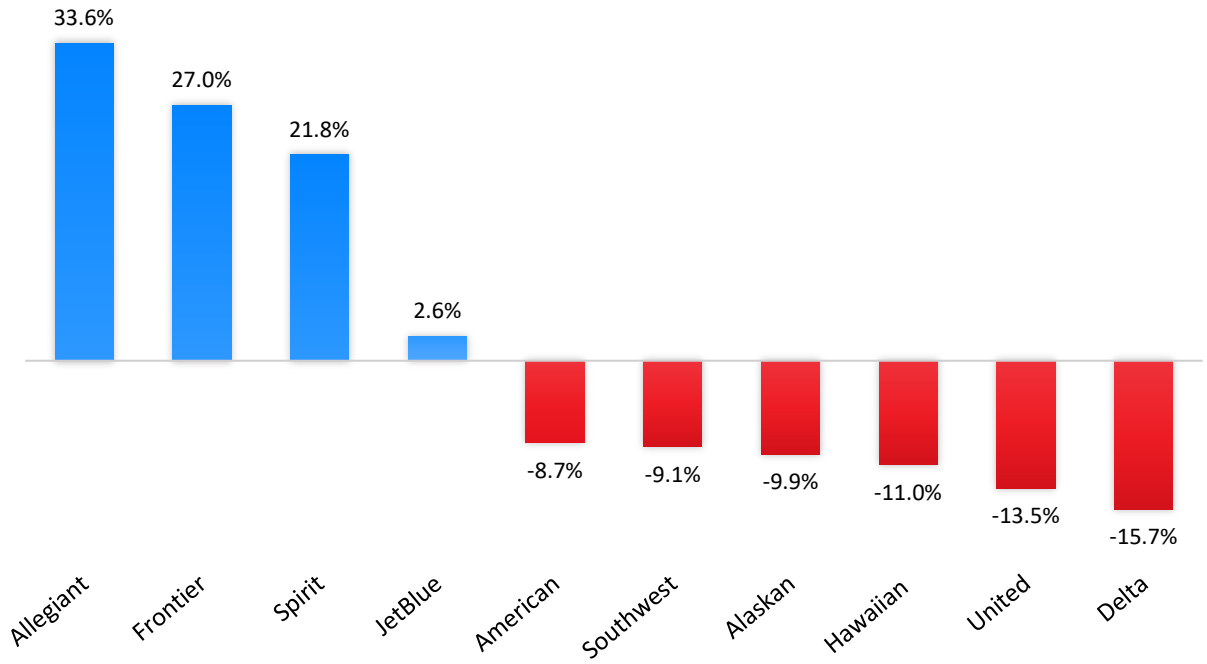
While passenger traffic continues to approach pre-pandemic levels, the recovery has not been consistent across all types of traffic. At the start of the pandemic, businesses around the world closed offices and sent staff to work from home, cancelling nearly all work-related travel in the process. Since then, some businesses have returned to normal operations, while many have opted to have staff work remotely and utilize virtual software in place of in-person meetings and travel. A 2021 Bloomberg survey of 45 large businesses across three continents revealed that 84 percent plan to reduce travel spending, with some companies reporting up to 40 percent reductions. [i] Additionally, a study conducted by data research group STR in November 2021 found that 44 percent of surveyed business travelers indicated they are less likely to travel for business purposes after the pandemic, while only 14 percent were more likely to travel.[ii] The consequences of these shifting trends are apparent, as business travel in the U.S. was down 46 percent in November 2021 compared to 2019.[iii]

Meanwhile, leisure travel has almost entirely recovered thanks to pent-up demand among domestic travelers. As early as May 2020, airports near popular leisure destinations in the U.S. saw passenger traffic levels rebound to pre-pandemic levels or above. In the aforementioned STR study, the same group of travelers were surveyed about their stance on leisure travel. Thirty-five percent of survey respondents indicated they are more likely to travel for leisure purposes after the pandemic, while just 10 percent said they would be less likely. Another new consumer trend that has emerged is the “work-cation,” in which travelers capitalize on remote working practices to travel to leisure destinations and both telecommute and participate in leisure activities. The STR survey revealed that 30 percent of business travelers would be more interested to go on a “work-cation” than before the pandemic thanks in part to their newly found flexibility.

While leisure travelers are eager to escape after months of shutdowns, companies are enjoying reduced operating costs and many of their employees have not resumed pre-pandemic travel practices. The outcome of this shift in business practices has been costly for the airline industry, as many airlines rely on business travel to support a significant portion of their operations. Leisure travelers often spend less on airfare than business travelers as they have more flexibility and can book trips further in advance, reducing the average ticket price. Business travelers, meanwhile, often book travel closer to their intended trip and must select certain flights to adhere to meeting or business schedules, regardless of ticket price. According to the U.S. Travel Association, leisure travelers in the U.S. spent an average of $417 per trip in 2019, while business travelers spent an average of $720 per trip. [iv] As such, airlines have seen a reduction in average ticket revenues despite the growth in passenger traffic. In December 2021, average consumer air fares were 18 percent less than December 2019 and down 29 percent from 2014, primarily due to the loss of business travel. It is unlikely that ticket prices will rise without the return of business travel, although inflation may reverse this trend.

Due to the changes in consumer preferences, airlines have not recovered evenly in the U.S. Legacy air carriers, such as American Airlines, Delta, and United rely on business and international travel to support their operations, as opposed to low-cost carriers (Southwest, JetBlue) and ultra-low-cost carriers (ULCCs), such as Spirit, Allegiant, and Frontier, who serve primarily domestic leisure travelers. As shown in **Figure 1-6**, ULCCs have capitalized on the growth in leisure traffic to expand their operations, while legacy carriers have reduced their operations due to having insufficient demand to maintain revenues. Allegiant has shown the strongest growth, increasing scheduled available seat miles by more than a third between 1Q 2019 and 1Q 2022. Conversely, United and Delta have reduced scheduled available seat miles by 13.5 and 15.7 percent respectively over the same period.

Figure 1-6: Change in Systemwide Scheduled Available Seat Miles
(1Q 2022 vs. 1Q 2019)



Source: Airlines for America

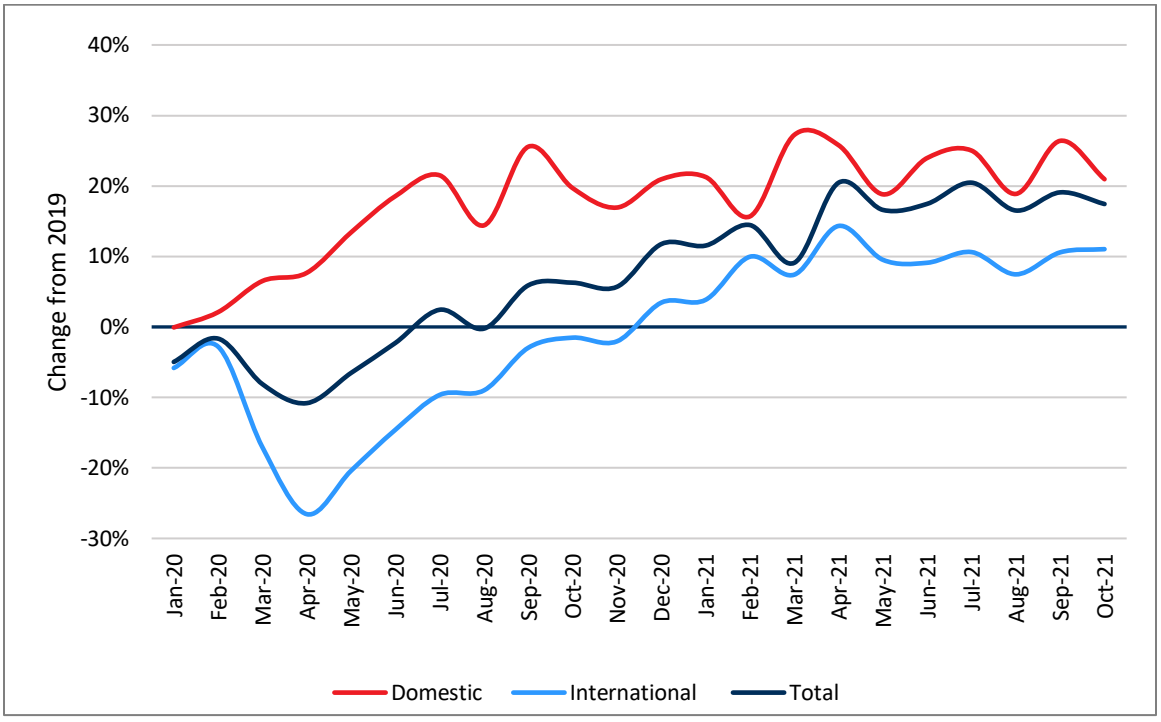
1.2.1.6. Air Cargo

Air cargo activities have increased steadily in recent years due to shifting consumer habits and the rise of online shipping. Between 2014 and 2019, the number of revenue ton-miles (RTM) flown by passenger and freight airlines within, to, or from the U.S. increased by 3.3 percent per year.[v] At the start of 2020, total air cargo activities were slightly lower than the start of 2019 due to declines in the international sector. Both domestic and international RTMs increased in February, before international traffic dropped off in March. Domestic cargo RTMs actually increased when almost all other aviation activities declined in spring 2020. International RTMs climbed steadily after April, while domestic cargo traffic began to fluctuate beginning in July.

Despite the significant disruption of international traffic early in the year, 2020 ended only two percent below 2019 due to significant growth in the domestic air cargo sector the entire year. Air cargo activities continued to climb in 2021 but showed some signs of increased volatility throughout the year. The up and down nature of the air cargo business in 2021 may be indicative of larger supply chain issues in the global economy that have limited the production of finished goods, particularly electronics, that are often transported via air cargo. While international air cargo levels trail gains made in the domestic market, international RTM have consistently exceeded 2019 levels since December 2020. Through October 2021, total cargo RTM are on pace to increase by 19 percent over 2019. **Figure 1-7** presents the domestic, international, and total air cargo RTM flown between 2020 and 2021 compared to 2019 levels.

Figure 1-7: U.S. Air Cargo Revenue Ton-Miles, 2020-2021

Domestic and International RTM Change from 2019



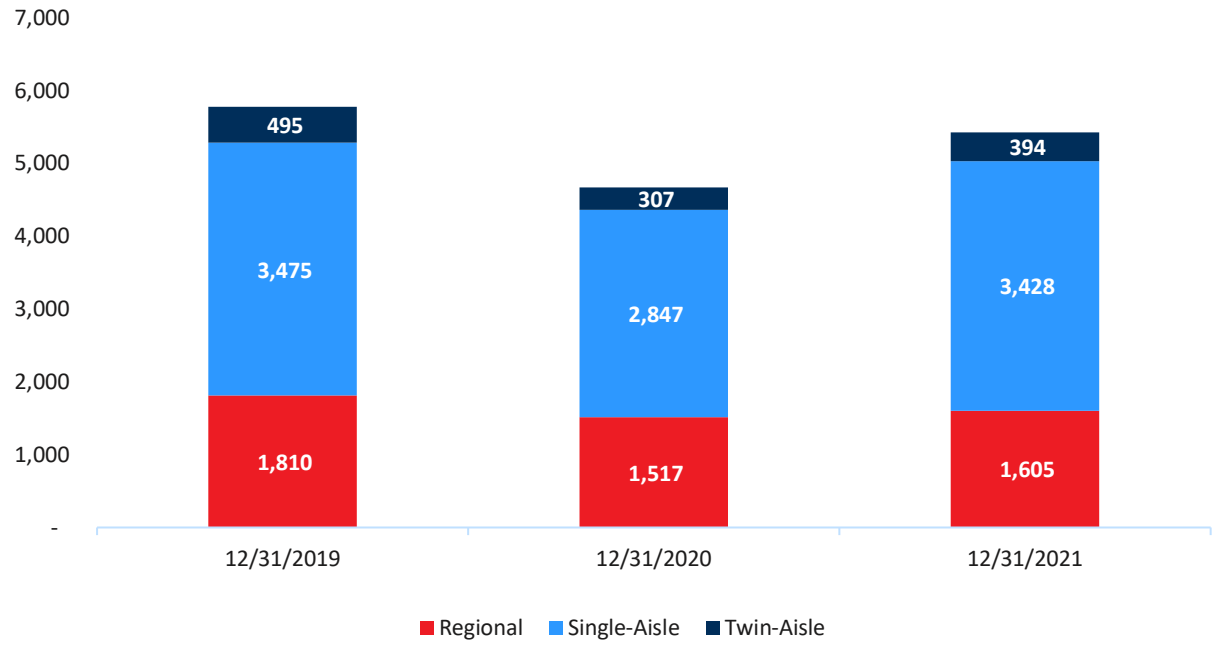
Source: U.S. Bureau of Transportation Statistics

1.2.2. Airline Operations

As passenger air travel ground to a halt at the start of the pandemic, airlines acted quickly to reduce operating costs to remain stable and operational. One of the most remarkable actions taken by airlines was the grounding and long-term storage of aircraft, which forced airports around the world to close runways and taxiways to accommodate parked planes. In May 2020, 52 percent of the total U.S. airline fleet, more than 3,000 aircraft, was temporarily grounded. As airlines reintroduced aircraft into service, they made strategic decisions to minimize costs and maximize utilization of their active fleet. Namely, airlines retired older wide-body and small regional aircraft with higher per seat mile operating costs. This mass retirement event reshaped the overall aircraft fleet in the U.S. and has significant ramifications on airline operations moving forward.

As shown in **Figure 1-8,** the number of active aircraft in the U.S. passenger airline fleet in 2021 decreased by nearly 20 percent from 2019 levels. The twin-aisle or 'wide-body' aircraft fleet decreased by 38 percent between year-end 2019 and 2020 due to the retirement of aircraft, such as the Boeing 767 and Airbus A330 from legacy airline fleets. The single-aisle fleet (Boeing 737, Airbus A320) shrank by 18 percent between 2019 and 2020, while the regional aircraft fleet (Bombardier CRJ-700, Embraer 145) only decreased by 16 percent during the same time period. However, while the single- and twin-aisle fleets have grown by 17 and 18 percent respectively, the regional aircraft fleet only grew five percent between 2020 and 2021. The slow growth in the regional aircraft fleet is likely caused by the termination of airline operations on smaller routes with low passenger volumes in favor of more profitable routes operated by larger aircraft. The single-aisle fleet has effectively returned to 2019 levels, buoyed by a strong recovery among domestic ULCCs and the resumption of deliveries of Boeing 737 MAX aircraft. As of December 31, 2021, 5,427 active aircraft were operational in the U.S. airline fleet, six percent less than two years prior.

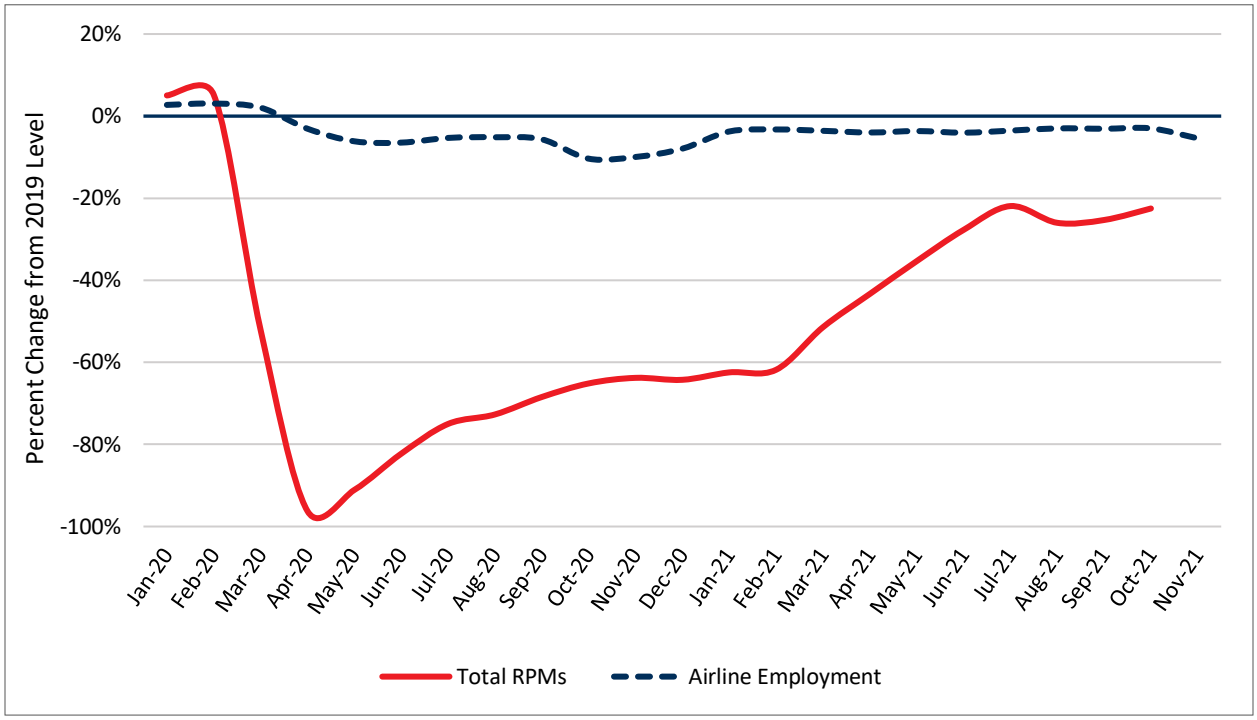
Figure 1-8: Number of Active U.S. Passenger Airline Aircraft, 2019-2021



Source: Airlines for America (A4A)

Airlines have experienced other operational changes, particularly related to staffing. The loss of passenger traffic caused widespread staff furloughs, retirements, and layoffs throughout the industry in 2020, and although some staff was retained as a result of government support (discussed further in **Section 1.2.4**), airline staffing levels are still lower than they were prior to the pandemic. **Figure 1-9** presents total employment among U.S. airlines and total revenue passenger miles (RPMs) in 2020 and 2021 compared to 2019. As shown, employment remained relatively steady (less than 10 percent decline) during the worst part of the industry downturn. However, since then, airline employment has only seen marginal growth despite the rapid rebound in passenger traffic. This stagnation was compounded by the pre-existing pilot shortage observed in the industry for several years prior to the pandemic. The result of these trends is near industry-wide staffing shortages that have significantly affected airlines' day-to-day operations. Additionally, the workforce has been impacted by COVID-19 surges as thousands of airline workers have been forced to call in sick due to infection or exposure to the virus. During the winter 2021 holiday season, thousands of flights across the U.S. were canceled due to staffing shortages amidst the spread of the Omicron variant. Airlines have gone to tremendous lengths to attract and retain staff, including offering new benefits and assisting with the application and selection process. Airport and airline efforts to attract staff is discussed further in **Section 1.3.5**.

Figure 1-9: U.S. Airline Employment and Revenue Passenger Miles (RPMs), 2020-2021 Compared to Pre-Pandemic Levels (2019)



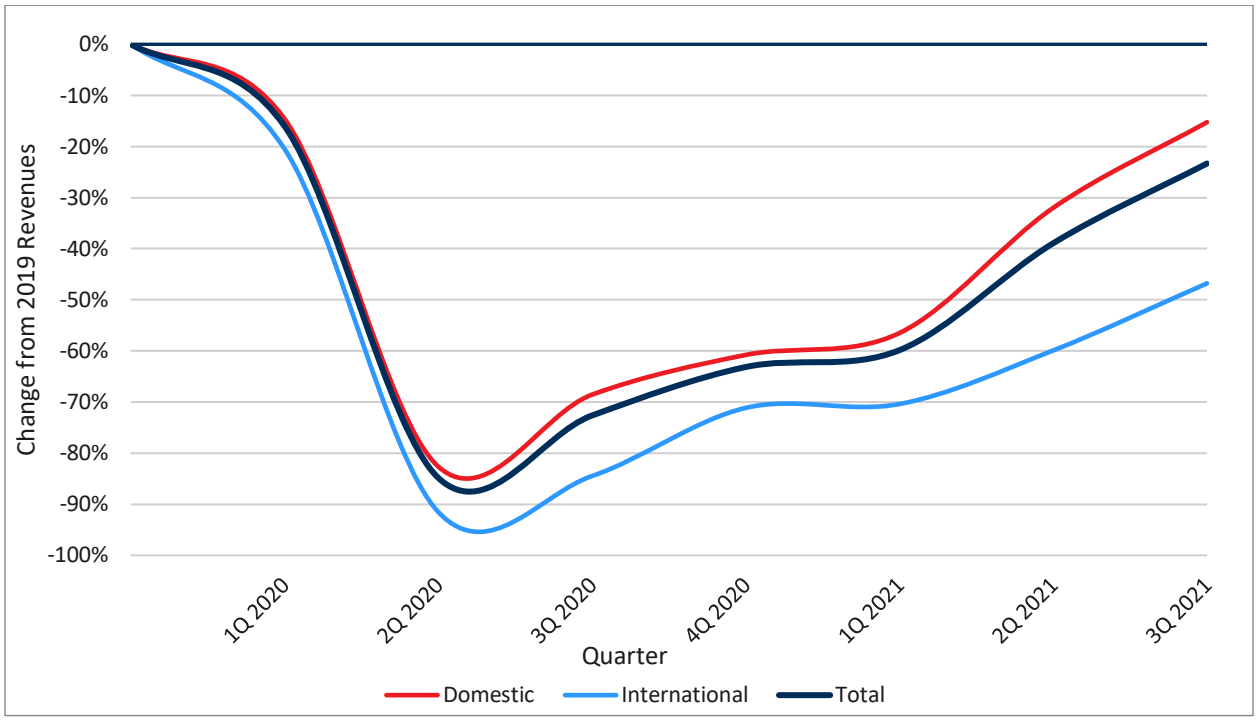
Source: U.S. Bureau of Transportation Statistics

1.2.3. Airline Finances

1.2.3.1. U.S. Airline Operating Revenues

Aviation is one of the most capital-intensive sectors in the global economy, requiring airlines to generate millions of dollars of operating revenue annually to remain operational. Airlines generate revenue through a number of means, but the largest single source of revenue comes from passenger ticket sales. When passenger traffic dropped to nearly nothing in second quarter 2020, total airline revenues declined more than 80 percent from the previous year. Revenues from domestic operations fared slightly better than international, dropping only 83 percent from 2019 compared to the 92 percent decrease recorded among airlines performing international operations. In the third and fourth quarters of 2020, airline revenues recovered slightly but were still 60 percent less than 2019. It wasn't until passenger air traffic began to increase significantly in the first half of 2021 that revenues rose to about 50 percent of 2019. As of the end of third quarter 2021, domestic airline revenues are 15 percent lower than 2019 while international revenues are 47 percent lower. Airline revenues are expected to remain depressed until business and international air traffic return to pre-pandemic levels. **Figure 1-10** compares total U.S. airline operating revenues in 2020 and 2021 to levels recorded in 2019.

Figure 1-10: U.S. Airline Operating Revenues, 2020-2021
Compared to Same Quarter 2019



Source: U.S. Bureau of Transportation Statistics

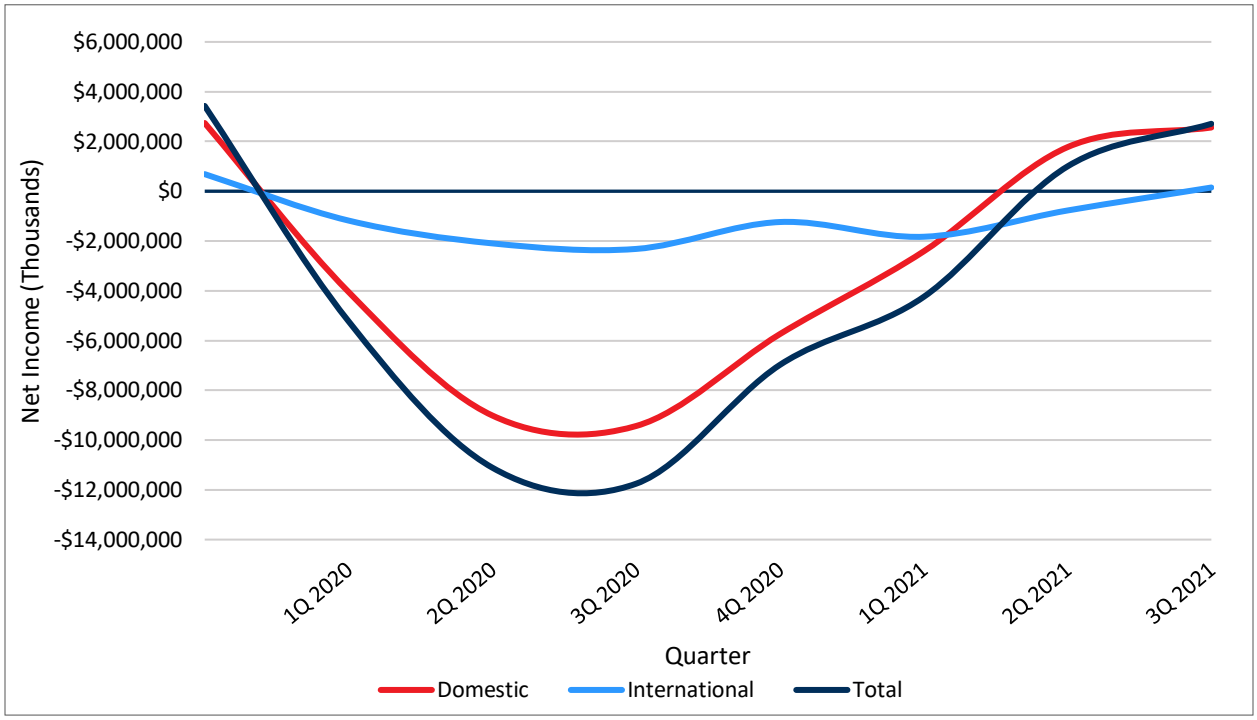
1.2.3.2. U.S. Airline Operating Revenues

Airlines are not only being affected by the loss of passenger revenues but are also impacted by rising costs for material and labor. Fuel costs are by far the largest single expense for any airline, making fuel prices a key factor in an airline's financial stability. At the start of the pandemic, fuel prices plummeted due to the sudden loss of demand and over-production of oil in Russia and the Middle East. While most airlines were aided by the lowered costs, some companies were adversely affected as they had previously signed fuel hedge agreements with set fuel costs, eliminating the advantage of low fuel prices. Crude prices climbed slowly in summer 2020 to approximately $40 per barrel in October 2020. Since then, oil prices have doubled to more than $80 per barrel, significantly increasing fuel costs for airlines.[vi]

The combination of lowered traffic and revenues and increased staff and fuel costs has been catastrophic for airlines, as 2020 saw the airlines record the largest losses in more than 20 years. Airline net income plummeted in 2020, mostly due to losses in the domestic sector, which comprises the majority of airline traffic. While the international sector never experienced as dramatic of losses as the domestic sector, international income has not returned, stressing airlines budgets as they try to recover. **Figure 1-11** presents the net incomes of U.S. passenger airlines in 2020 and 2021.

Figure 1-11: U.S. Passenger Airline Net Income, 2020-2021

Thousands of Dollars ($)



Source: U.S. Bureau of Transportation Statistics

1.2.4. Government Actions

In response to the unprecedented economic and social disruption caused by the pandemic, the U.S. government has enacted several orders and legislations to provide relief to individuals and businesses impacted by the pandemic. Beginning in March 2020, Congress has passed three acts that provided direct financial assistance to passenger airlines, cargo air carriers, and eligible airports. These legislations include the Coronavirus Aid, Relief, and Economic Security (CARES) Act of 2020, the Coronavirus Response and Relief Supplemental Appropriation Act (CRRSAA) of 2021, and the American Rescue Plan Act (ARPA) of 2021. These pieces of legislation have been vital for the continued operations of the airline and airport industry during the initial downturn and ongoing recovery period in the industry. The three acts are discussed in further detail below.

1.2.4.1. Coronavirus Aid, Relief, and Economic Security (CARES) Act

Signed into law on March 27, 2020, the CARES Act of 2020 was the first legislation to provide pandemic relief, offering more than $2 trillion in funding to stimulate the economy. Congress allocated $25 billion to the Payroll Support Program (PSP1) to be made available to U.S. passenger airlines to provide economic relief during the first months of the pandemic. As of December 2021, 351 U.S. passenger air carriers have participated in the PSP1, receiving an estimated $100 million in economic relief. Airlines who received funding were required to exclusively use CARES Act funding to pay employee wages, salaries, and benefits and were required to refrain conducting involuntary layoffs or furloughs through September 30, 2020. Additional restrictions limit participating airlines from paying stock dividends or capital distributions, and limit compensation for certain employees, primarily executive staff.[vii]

The CARES Act also allocated $10 billion to provide economic assistance to over 3,000 commercial service and GA airports around the country to supplement lost revenues. The funds were distributed through two primary channels. The first was the FY2020 Airport Improvement Program (AIP) and Supplemental Discretionary Grant Program, which increased the federal share of FY2020 grants to 100 percent. This funding ensured that critical safety and capacity projects continued as planned if the airport sponsor had lost the necessary revenues to support the project.

The second channel of funding was dispersed through was the Airport Coronavirus Response Grant Program, which allocated funding to airports included in the Federal Aviation Administration's (FAA) 2019-2023 National Plan of Integrated Airport Systems (NPIAS). Funding was separately allocated to three distinct classification of airports as defined by the NPIAS: primary airports, non-primary commercial service airports, and 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 annual airport enplanements, airport debt service, and unrestricted funding reserves held by the airport sponsor. Funds were allocated to GA airports based on the airport's NPIAS classification (National, Regional, Local, Basic, and Unclassified).[viii]

1.2.4.2. Coronavirus Response and Relief Supplemental Appropriation Act (CRRSAA)

The CRRSAA Act was signed into law on December 27, 2020 to provide additional relief to aviation businesses and airports affected by the pandemic. The CRRSAA made $15 billion available to eligible passenger air carriers through the Payroll Support Program Extension (PSP2), which included 306 participating airlines. PSP2 had similar requirements to PSP1's, requiring participants to use the funding for payroll and refrain from conducting involuntary furloughs or layoffs. Additionally, airlines that participated in PSP2 were required to recall all employees that were furloughed or laid off between March 27, 2020 and the signing of the PSP2 agreement.[1] Participants were also required to compensate returning employees with lost salary, wages, and benefits between December 1, 2020 and the signing of the PSP2 agreement. PSP2 also included similar capital distribution and executive compensation restrictions as PSP1.[ix]

To provide additional relief from the ongoing impacts, CRRSAA allocated $2 billion to eligible NPIAS airports. As a result of primary commercial airports generally being more affected by the pandemic, $1.95 billion of the funding was distributed to primary commercial airports with $1.75 billion of this allocated for operating expenses and certain capital projects, similar to the CARES Act, and $200 million made available to provide economic relief to on-airport rental care operators and in-terminal concessionaires.The remaining $45 million of the total CRRSAA airport funding was provided to non-primary commercial service and GA airports based on their NPIAS classification.[x]

1.2.4.3. American Rescue Plan Act of 2021

On March 11, 2021, the one-year anniversary of the declaration of the pandemic, the American Rescue Plan Act (ARPA) was signed into law to provide a third round of financial support to airlines and airports. ARPA allocated $14 billion to airlines through the second round of the Payroll Support Program Extension (PSP3). The PSP3 program offered participants of the PSP2 program additional funding with the same requirements as PSP2.

ARPA also made $8 billion in funding available to eligible airports in the NPIAS. Similar to the CARES Act, ARPA provided funding to increase the federal share of AIP grants to 100%. $6.5 billion in funds were distributed to primary commercial service airports to compensate lost airport revenues, while $800 million was distributed to airports to make available to on-airport tenants, similar to the CRRSAA. Finally, $100 million was distributed to non-primary commercial service and GA airports based on their NPIAS classifications.[xi]

All 20 commercial service airports in Florida received grants from the CARES Act, CRRSAA, and ARPA, culminating in more than $1.8 billion of financial relief statewide. The amount of funding received by each Florida commercial service airport from the three Congressional acts is detailed in **Table 1-1.**

[1] PSP2 participating airlines who received assistance from PSP1 were required to recall staffing who were furloughed or terminated after October 1, 2020.

Table 1-1: Government Coronavirus Relief Funding Amounts by Airport

Airport Name	Airport ID	Associated City	CARES Amount	CRRSAA Amount	ARPA Amount
Daytona Beach International	DAB	Daytona Beach	$21,053,492	$2,741,505	$4,523,976
Destin-Fort Walton Beach	VPS	Valparaiso	$12,429,334	$4,239,498	$8,494,651
Fort Lauderdale/ Hollywood International	FLL	Fort Lauderdale	$134,958,902	$31,110,769	$125,431,260
Gainesville Regional	GNV	Gainesville	$3,113,693	$2,352,662	$3,781,784
Jacksonville International	JAX	Jacksonville	$28,169,797	$8,633,435	$27,351,083
Key West International	EYW	Key West	$21,789,697	$3,644,176	$6,246,931
Melbourne International	MLB	Melbourne	$19,823,709	$2,168,698	$3,430,647
Miami International	MIA	Miami	$206,949,557	$39,475,731	$159,986,785
Northwest Florida Beaches International	ECP	Panama City Beach	$6,327,925	$3,882,915	$7,132,887
Orlando International	MCO	Orlando	$170,702,779	$41,668,083	$171,309,787
Orlando Sanford International	SFB	Orlando	$22,742,502	$5,521,042	$13,897,531
Palm Beach International	PBI	West Palm Beach	$36,613,068	$8,412,118	$26,510,263
Pensacola International	PNS	Pensacola	$11,081,566	$4,739,138	$10,486,360
Punta Gorda	PGD	Punta Gorda	$23,846,735	$4,254,262	$8,551,029
Sarasota/ Bradenton International	SRQ	Sarasota/ Bradenton	$23,294,336	$4,543,643	$9,656,154
Southwest Florida International	RSW	Fort Myers	$36,603,212	$10,941,085	$37,500,182
St. Pete-Clearwater International	PIE	St. Petersburg/ Clearwater	$8,737,268	$4,808,496	$10,788,946
Tallahassee International	TLH	Tallahassee	$21,213,414	$3,170,028	$5,341,912
Tampa International	TPA	Tampa	$81,029,598	$20,561,932	$79,217,627
Vero Beach Regional	VRB	Vero Beach	$1,042,438	$23,000	$59,000
Statewide Total			**$891,523,022**	**$206,892,216**	**$719,698,795**

Source: FAA

1.3. Impacts to Florida's Commercial Service Airports

Florida's commercial airport service airports experienced the same turbulence as the rest of the aviation industry in the first half of 2020, seeing unprecedented declines in traffic and revenues. However, the state's recovery since then has been nothing short of remarkable, as its airports are among the nation's highest performers. The following sections serve to document the ongoing impacts of the pandemic on airports and provide a comparison between the current condition of the Florida commercial aviation industry with what was reported in summer 2020. These sections examine impacts on airport revenues and capital improvement programs, as well as airport and business tenant staffing and operations. Additionally, these sections discuss the actions taken by airports to achieve such impressive growth in the past two years and forward-looking plans to continue on a path towards growth and stability in the years to come.

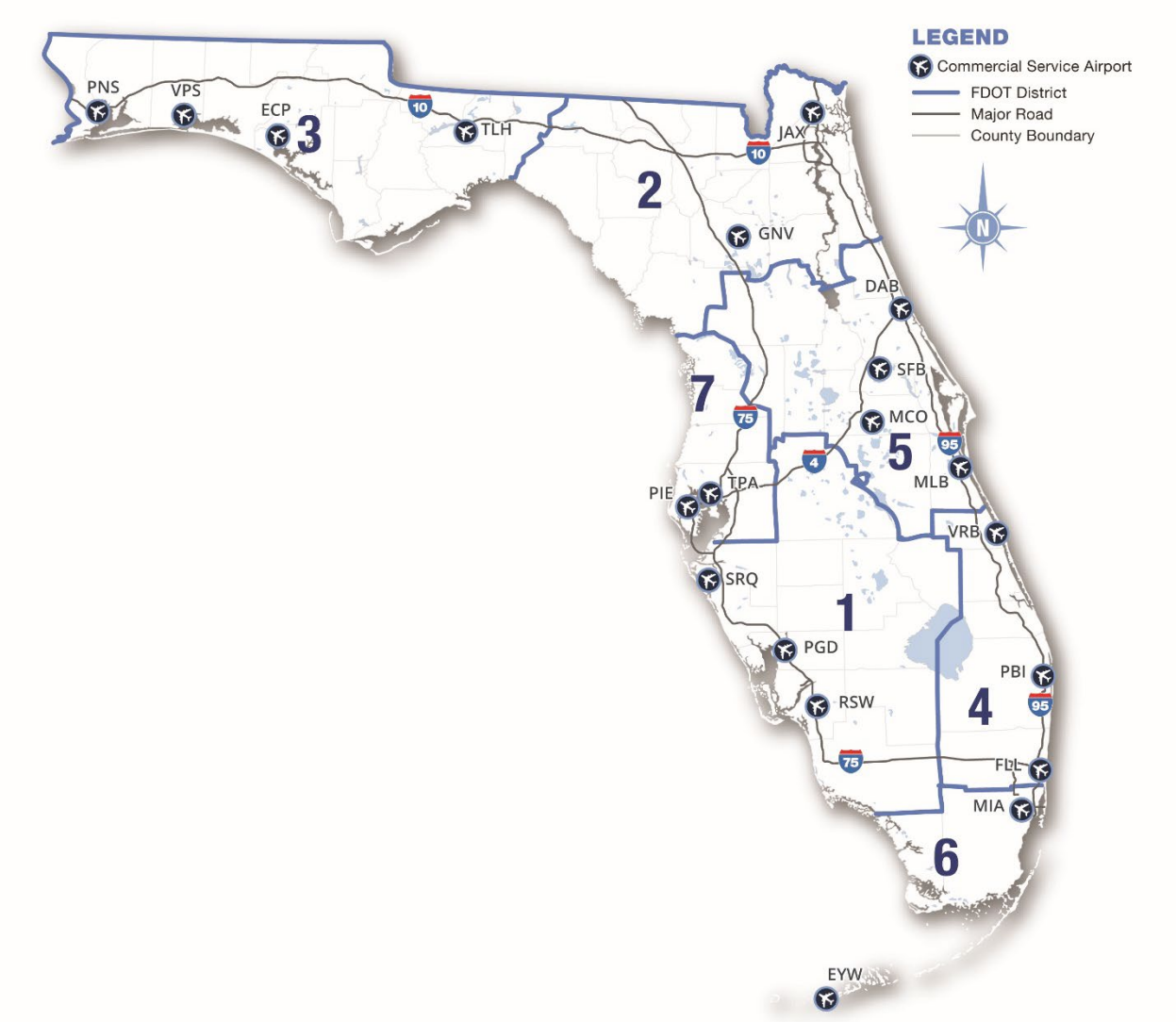
1.3.1. Data Collection Process

Data for this analysis was collected through an outreach process that included questionnaires, phone interviews, and industry research. The airport questionnaires were individually prepopulated with each airport's responses to applicable questions from the 2020 outreach effort. These questionnaires were then used to facilitate conversations between the project team and airport managers and staff members. The calls were completed between mid-November 2021 and early January 2022. Airports were asked to provide information about the pandemic's impact on their airport's revenues, operations, staffing, and capital development projects. Airport staff were asked to provide fiscal year 2021 (FY2021) operating revenues in comparison to FY2019 and FY2020 and the budgeted revenues for FY2022, providing four years of total data. Airport representatives were also asked to discuss changes to concessionaire staffing levels and operations and the airport's efforts to return to normal operations. Additionally, airport representatives were asked to discuss concerns regarding airport capacity and future prosperity, including any projections they had developed related to future operational or financial changes at their facilities.

In total, 19 of the 20 commercial service airports in Florida elected to participate in the Year-end 2021 Study outreach.[2] These airports are shown below in **Figure 1-12.** Additionally, airports provided passenger enplanement data via FDOT AO's monthly passenger boarding records, which provides up-to-date records of passenger traffic levels at all commercial service airports in the state.

[2] For the purpose of this analysis, commercial service airports were categorized using their classifications from the FAA's 2019-2023 NPIAS report, which was utilized in the Fall 2020 study.

Figure 1-12: Florida Commercial Service Airport System

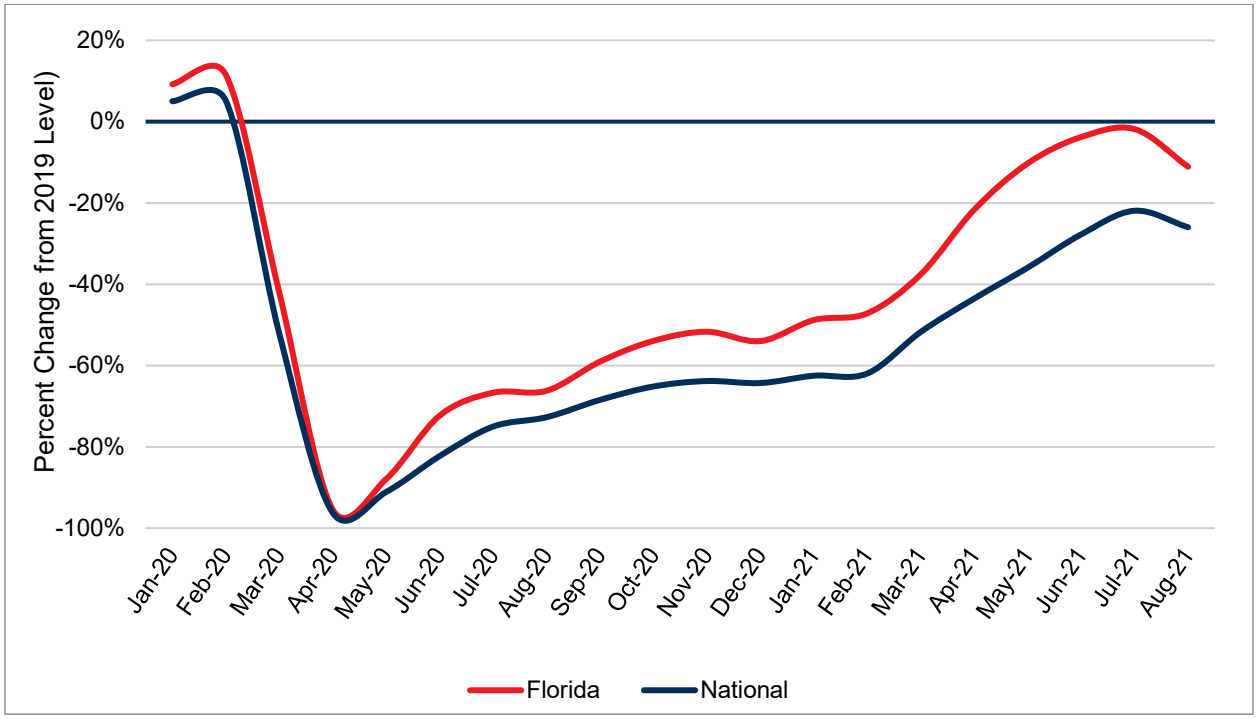


Note: Destin-Fort Walton Beach Airport (VPS) elected not to participate in the outreach process. However, VPS is still included in the subsequent chapters of this analysis.
Source: FDOT Aviation Office, Kimley-Horn

1.3.2. Impacts to Florida Passenger Air Traffic

Figure 1-13 illustrates statewide passenger enplanement levels in 2020 and 2021 compared to the same month in 2019. As shown, Florida's airports saw the same dramatic decline in passenger enplanements at the start of the pandemic, dropping 96 percent in April 2020 from the year prior. Since then, Florida has far outperformed the rest of the nation, at points achieving traffic levels 15 percent higher than the national total. Florida experienced the same rapid growth as the rest of the country between February and June 2021, and even exceeded 2019 levels in June. However, the emergence of the Delta variant and the end of the summer travel season brought enplanement levels down again. As a result, Florida's statewide passenger enplanement levels were eight percent lower in August 2021 compared to 2019. However, Florida's commercial airport system was still outperforming the U.S. total by nearly 20 percent. It is important to note each airport in Florida has recovered at a different pace than others. A discussion of traffic recovery at individual airports is discussed further in **Chapter 3.**

Figure 1-13: Florida and U.S. National Passenger Traffic Levels, 2020-2021
Total Passenger Enplanements vs. Same Month 2019



Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), U.S. Bureau of Transportation Statistics

1.3.3. Impacts to Airport Revenues

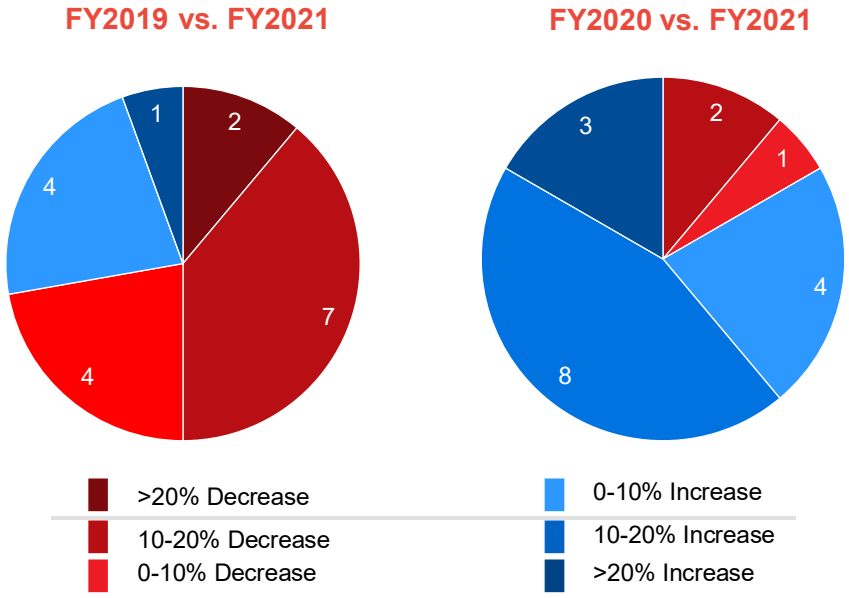
During the outreach process, airport representatives were asked to disclose the annual operating revenues of their airports from FY2019, 2020, and 2021.[3] Additionally, airport representatives were asked to identify the three largest sources of operating revenues each year. These metrics help illustrate the overall financial impacts experienced by each airport and offer context as to why some airports were impacted differently than others. Eighteen airports provided operating revenues for all three years. Of these, Daytona Beach International (DAB) experienced the largest decline between FY2019 and FY2021 as revenues were more than 28 percent lower in FY2021 than FY2019. Conversely, Northwest Florida Beaches International (ECP) reported the largest increase between FY2019 and FY2021, growing 44.9 percent over the two years.

Thirteen airports reported a decrease from FY2019 to FY2021, with just two airports recording more than a 20 percent decline over the two-year period. However, 15 airports reported an increase in revenues from FY2020 to FY2021, indicating airline revenues are already seeing strong recovery.

Figure 1-14 presents the year-over-year revenues changes in the airport system between FY2019 and FY2021 and between FY2020 and FY2021. As shown, half of the 18 airports reported declines of more than 10 percent between FY2019 and FY2021, while five airports reported an increase from FY2019 to FY2021. From FY2020 to FY2021, only three airports reported a decline compared to 13 between FY2019 and FY2021. On average, the commercial airport system experienced a 6.3 percent decrease in operating revenues between FY2019 and FY2021.

[3] All 2021 operating revenues account for the full fiscal year (usually October 1-September 30) but are considered unaudited estimates. Actual 2021 operating revenues may differ from what is reported in this analysis.

Figure 1-14: Changes to Florida Airport Operating Revenues
Number of Airports Reporting Revenue Changes within Range



Source: Fall 2021 COVID-19 Airport Outreach Survey, Kimley-Horn

1.3.3.1. Revenue Streams

Airport representatives were asked to report the three largest sources of operating revenues for their airports in FY2019 and FY2021. While every airport's revenue structure is unique, most of the reported sources can be classified into one of the five following categories:

- **Airline Fees and Rents:** Airline landing fees ground handling fees, ticket counter, gate, and other terminal rents
- **Concession/Terminal Rent**: Concessionaire terminal rental space, concessionaire revenue sharing, and minimum annual guarantee (MAG)
- **Rental Cars:** Terminal rents and customer facility charges (CFCs)
- **Parking:** Airport owned parking lots and revenue share from private parking operators
- **Non-terminal Land or Building Rents:** Hangar and non-terminal building rents and industrial/commercial park rents

These categories represent a wide variety of individual revenue streams, each of which is dependent upon a combination of factors. Some revenue sources, such as rental cars and parking are highly dependent on passenger traffic and can change dramatically if air service is interrupted. Other revenue streams, such as land and hangar rents are less elastic as they rely on long term contracts to generate revenue, insulating them from the volatility of passenger air traffic. As such, each airport saw revenues change in different fashions as passenger and air traffic declined in 2020.

Table 1-2 presents the top three sources of operating revenue reported by each airport. Eighteen airports provided responses, while Key West International (EYW) and Destin-Fort Walton Beach (VPS) declined to participate. Among the 18 commercial airports, airline fees and rents were the most common top revenue source in both FY2019 and FY2021 while concession/terminal rents were the second most

common, despite the loss of passenger traffic. It is possible that these revenue streams declined during the early stages of the pandemic but were supplemented by CARES funding. Due to the commonality in top revenue sources among all airports, it is difficult to identify any correlation between the reliance on certain streams and changes to overall operating revenues.

Five airport representatives reported a change in their airport's largest revenues streams, while 13 reported no change. Of the 13 airports who reported no change in revenue sources, 11 experienced a decrease in revenues between FY2019 and FY2021. This strong correlation indicates operating revenues likely declined evenly across all revenue streams when passenger traffic declined and are now recovering but have not reached FY2019 levels. Meanwhile, three of the five airports that reported changes to their top revenue streams, also reported an increase in revenues from FY2019 to FY2021, indicating that the lost revenues among the top FY2019 revenue streams were supplemented by strong performance in other portions of the airport business.

The top sources of revenue at each airport in FY2019 are shown in **Table 1-2** with a blue checkmark, while top sources for FY2021 are shown with a red check mark. Airports who did not provide a response are noted as "NP".

Table 1-2: Top Sources of Operating Revenue by Airport, FY2019 vs. FY202021

Airport	Airport ID	Associated City	Revenue Type					
			Airline Fees and Rents	Concession/ Terminal Rents	Rental Cars	Parking	Building Rents	Other
✓ - 2019 Revenue Source ✓ - 2021 Revenue Source								
Daytona Beach International	DAB	Daytona Beach	✓	✓✓			✓✓	✓
Destin-Fort Walton Beach	VPS	Valparaiso	NP					
Fort Lauderdale/Hollywood International	FLL	Fort Lauderdale	✓	✓	✓✓	✓✓		
Gainesville Regional	GNV	Gainesville	✓	✓	✓✓	✓✓		
Jacksonville International	JAX	Jacksonville	✓	✓✓		✓✓	✓	
Key West International	EYW	Key West	NP					
Melbourne International	MLB	Melbourne	✓✓	✓✓	✓✓			
Miami International	MIA	Miami	✓✓	✓✓				✓✓
Northwest Florida Beaches International	ECP	Panama City Beach	✓✓	✓✓				✓
Orlando International	MCO	Orlando	✓✓	✓✓				✓✓
Orlando Sanford International	SFB	Orlando	✓✓	✓✓			✓✓	
Palm Beach International	PBI	West Palm Beach	✓✓	✓✓		✓✓		
Pensacola International	PNS	Pensacola	✓✓		✓✓	✓✓		
Punta Gorda	PGD	Punta Gorda	✓✓		✓	✓	✓	✓
Sarasota/Bradenton International	SRQ	Sarasota/ Bradenton		✓✓	✓✓	✓✓		
Southwest Florida International	RSW	Fort Myers	✓✓		✓✓	✓✓		
St. Pete-Clearwater International	PIE	St. Petersburg/ Clearwater	✓	✓	✓✓	✓✓		
Tallahassee International	TLH	Tallahassee	✓✓			✓✓	✓✓	
Tampa International	TPA	Tampa	✓✓		✓✓	✓✓		
Vero Beach Regional	VRB	Vero Beach		✓✓			✓✓	✓✓

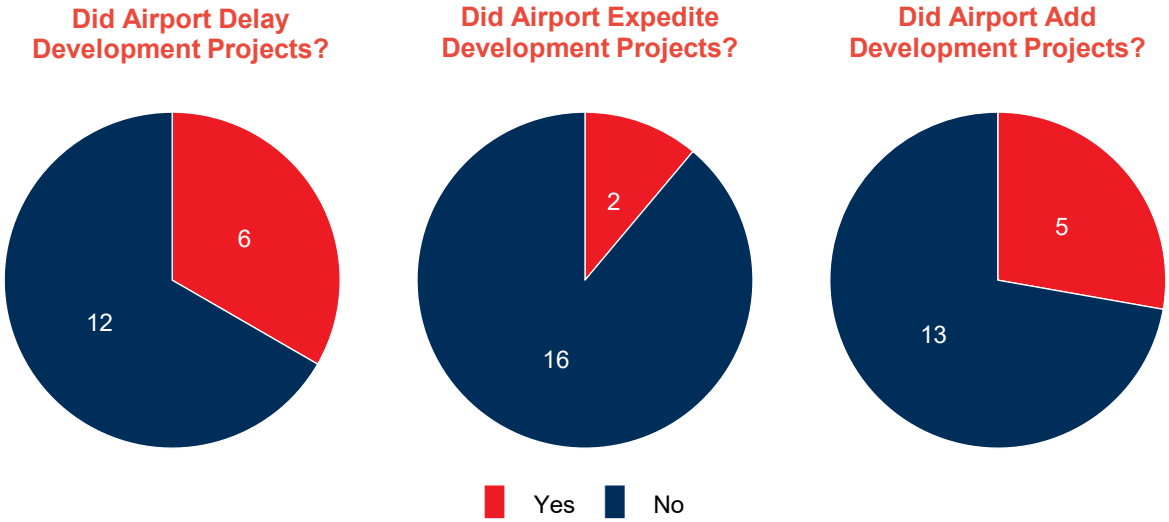
Sources: Year-end 2021 COVID-19 Airport Outreach Survey, Kimley-Horn

1.3.4. Impacts to Airport Capital Development

The economic and social restrictions implemented in response to the pandemic in early 2020 created numerous disruptions in not only day-to-day airport operations but also in capital development and construction at airports. Many airports around the country reshuffled their Capital Improvement Programs (CIP) to delay or indefinitely hold development projects due to a loss of funding (local or state/federal), supply chain disruptions, labor constraints, or other factors. In the Year-end 2021 Study outreach process, airport representatives were asked to discuss any changes to existing or planned capital development projects stemming from the impacts of the pandemic. Additionally, airports were asked to provide a status update on impacted projects that were identified during the 2020 outreach effort. In general, airports have returned to their pre-pandemic capital development plans with few changes to projects.

Among the 18 airports that provided responses, no airport reported canceling a development project at any point as a result of the pandemic. Instead, several indicated the projects that had been previously canceled or delayed were reinstated amidst the period of strong recovery. One-third of the responding airports stated they were still delaying projects as of December 2021, mainly due to funding concerns. Many of these projects were split into multiple phases that could be completed in separate years to ensure local, state, and federal funding was secured. The decline in passenger traffic afforded an opportunity to airports during the early months of the pandemic. Because many development projects require airports to work around passengers, ground vehicles, and aircraft, which can slow construction progress, the reduced number of passengers allowed airports to expedite certain projects. For example, West Palm Beach International (PBI) was able to shorten a project to replace escalators in the terminal by nearly half because the reduction of foot traffic allowed the airport to work on four escalators at a time instead of two. Five airports also reported adding projects to their CIP as new funding became available or new challenges arose. The rapid recovery at some airports forced their management to begin planning for projects to remodel or expand existing facilities. **Figure 1-15** presents the responses regarding changes to capital development projects at airports.

Figure 1-15: Changes to Airport Capital Development Projects



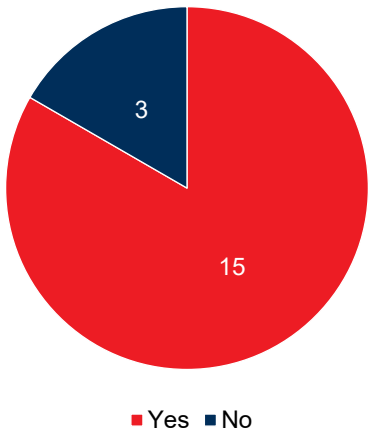
Sources: Year-end 2021 COVID-19 Airport Outreach Survey, Kimley-Horn

In the past 18 months, a number of new challenges have emerged that threaten airports' abilities to complete construction projects and reinitiate CIPs. Namely, significant changes in the construction industry have greatly affected the timeline and budgets of many projects. In early 2020, the industry experienced supply chain and labor issues as construction workers and manufacturers were sent home. Since then, interruptions have occurred in the international trade market, impacting the availability of raw goods and finished products. Many airports have had to modify project and procurement schedules to account for longer lead times when purchasing construction materials or equipment for the day-to-day operations of the airport. These supply chain issues have not only affected the schedule of many airport projects but also the budget, as both labor and material costs have increased dramatically in the past two years. As such, airports are having to reduce the scope of projects to limit associated costs so existing state and federal grant funding can adequately cover costs.

1.3.4.1. Capacity Concerns

Growth at some Florida airports has been so dramatic in the past 18 months that existing facilities are nearing their planned capacities. As shown in **Figure 1-16**, 15 airport representatives reported having concerns about their airport being at or near capacity within the next five years. Airports identified a variety of different facilities that were expected to meet capacity within the five-year timeframe, including airline ticket counters, gates, parking lots, and security checkpoints. Most airports indicated they were working to address capacity concerns and feel they are well positioned to meet demand in the short-term. Efforts made by airports to address capacity concerns include specialized forecasting efforts, updating airport master plans, and revising existing or planned projects to best suit projected airport needs. A number of expansion projects are already underway, including new or expanded terminals being constructed at Fort Lauderdale/Hollywood International (FLL) and Southwest Florida International (RSW). Other airports are completing development projects but are reconfiguring the development to accommodate future needs.

Figure 1-16: Does the Airport have Capacity Concerns in Short-term Future?



Sources: Year-end 2021 COVID-19 Airport Outreach Survey, Kimley-Horn

The pandemic and subsequent recovery period also allowed airports to complete innovative projects that may influence the future of airport design. Tampa International (TPA) is in the process of completing a roadway access improvement project that has never been implemented before in the U.S. Once complete, the project will introduce 'express lanes,' which separate departing passengers with checked luggage from those with only carry-on luggage. The system is designed to allow passengers with carry-on luggage to bypass the ticketing and check-in area, saving passengers time and improving the flow of vehicles at the airport curb. If the project is deemed successful at TPA, it is likely such a curbside system would be implemented at airports around the country.

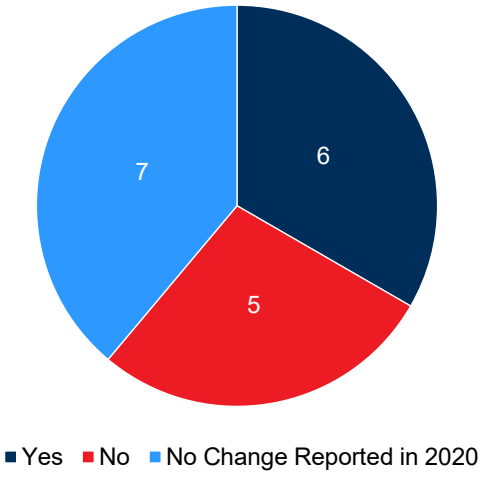
1.3.5. Impacts to Airport and Tenant Staffing

Airports and aviation are a very labor-intensive industry, requiring thousands of airline, airport, and aviation business employees to maintain normal operations. In the early months of the pandemic, the loss of passenger traffic caused airports and airlines to lay off, furlough, or retire staff to remain operational. At the same time, many on-airport concessions either closed or significantly reduced hours to avoid bankruptcy.

1.3.5.1. Airport Staffing

In the Fall 2020 Study, airport employment levels were reported to have remained consistent at Florida's commercial service airports, with only minor staffing changes. Fortunately, this staffing stability appears to have persisted in the 18 months since the previous study was conducted, as most airports have avoided large-scale employee layoffs or furloughs. As shown in **Figure 1-17**, 6 of the 18 respondent airports reported airport sponsor staffing was at 2019 levels. Seven additional airports reported no staffing changes in 2020 or 2021, indicating that staffing levels did not need to return to normal. Five airports stated that staffing had declined in 2020 and had not yet returned to 2019 levels.

Figure 1-17: Have Airport Sponsor Staffing Level Returned to Normal?

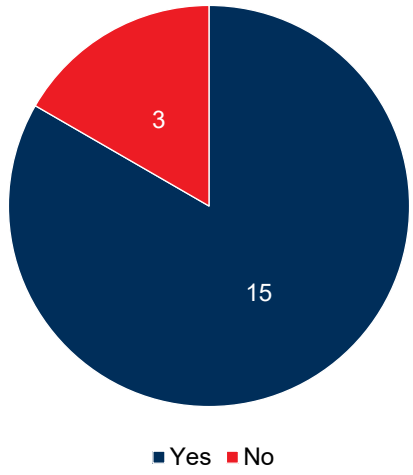


Sources: Year-end 2021 COVID-19 Airport Outreach Survey, Kimley-Horn

1.3.5.2. Airport Staffing - Retention

Airport representatives noted that although large scale nonvoluntary separations have not occurred, the number of retirements increased, particularly in executive positions. This was partially the result of airport-implemented programs offering additional benefits and early retirement packages for staff but was also indicative of larger labor market trends. Many airports also reported the implementation of hiring freezes in 2020, leaving a number of airport positions vacant during the downturn. Airports have since lifted those hiring freezes, but many have encountered challenges in filling vacant positions and expanding staff. Fifteen airport representatives reported facing difficulty in finding and retaining qualified candidates, as shown in **Figure 1-18.**

Figure 1-18: Is Airport Having Difficulties Attracting or Retaining Staff?



Sources: Year-end 2021 COVID-19 Airport Outreach Survey, Kimley-Horn

Airports were asked to identify certain types of positions that have been most difficult to fill. Many airports reported that they were encountering considerable difficulty in filling skilled trade positions, such as electricians, plumbers, mechanics, and machinists. Other positions that have been reportedly difficult to fill include first responders, such as aircraft rescue and firefighting (ARFF) and law enforcement officers. Airport representatives cited the inability to offer competitive compensation compared to other businesses as a factor in the struggle to attract qualified applicants.

Airports have engaged in a variety of initiatives to attract new workers for both airport sponsor and onsite business positions. Nine airport representatives noted they had hosted a job fair at their airports to bring attention to open positions for both the sponsor's organization and business tenants on the airport. Fairs have included onsite interviews, resume and application review programs, and partnerships with recruiting agencies to give interview tips for candidates.

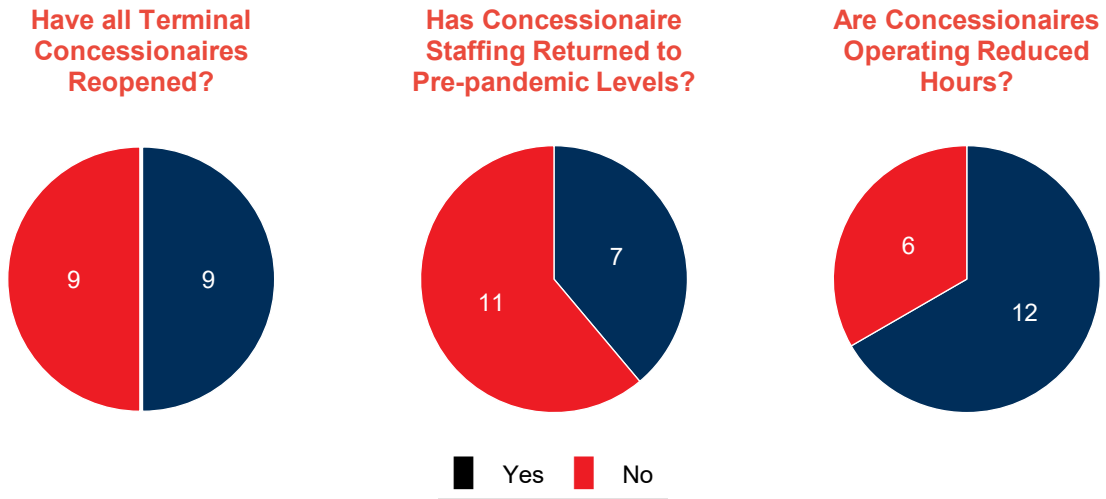
1.3.5.3. Concession Staffing

Although passenger traffic has rebounded at many airports, on-airport businesses have struggled to return to normal operations. One of the main reasons for this slow recovery is the challenges airports are facing when trying to attract and retain qualified employees. Given this, airport representatives were asked to provide information about the staffing of onsite business tenants at their airport. Specifically, airports discussed changes to operations and staffing at terminal concessionaires, as these businesses were impacted considerably when passenger traffic declined. **Figure 1-19** presents the results of airport responses regarding the status of concessionaire reopening, concessionaire operating hours, and concessionaire staffing levels.

A significant portion of concessionaires closed in 2020 to reduce costs and prevent the spread of the virus given the very low levels of passenger traffic. Since then, airports have worked diligently with concessionaires to reopen to varying degrees of success. As shown in **Figure 1-19,** nine of 18 respondent airports reported that all terminal concessionaires had reopened, while nine have yet to reopen fully. The nine airports that have reopened all concessionaires are mostly the small- and medium-sized airports in the state, as those facilities generally have fewer businesses that serve passenger traffic. Conversely, the airports that have not fully reopened include all four large hub airports in the state (Fort Lauderdale, Orlando, Miami, and Tampa) and other airports with at least dozens of concessionaire businesses onsite.

Trends in the greater labor market have also resulted in lower retention rates among retail and service workers, which represent a substantial share of the airport workforce. As such, airport representatives were asked whether concessionaire staffing had returned to 2019 levels at their airports. As shown in **Figure 1-19,** only seven of the 18 airports reported staffing returning to 2019 levels. Among these airports, most noted that concessionaires were still short-staffed. Further, 12 airports indicated that concessionaires in their facilities had reopened but were operating under a modified or shortened schedule. Additionally, some airports rely on one company to operate multiple concessionaire storefronts in the terminal, and airport representatives reported many of these businesses have only partially reopened and/or have consolidated operations.

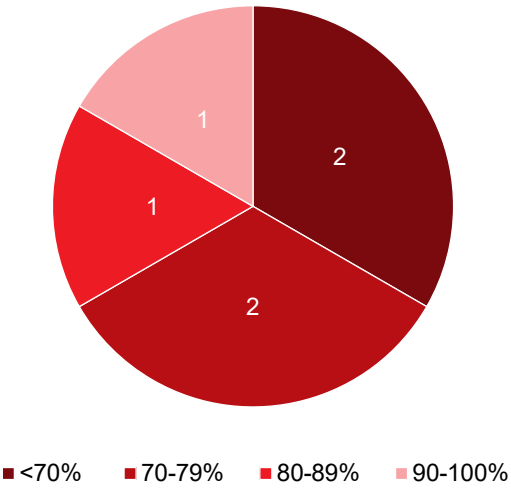
Figure 1-19: Changes to Concessionaire Staffing and Operations



Sources: Year-end 2021 COVID-19 Airport Outreach Survey, Kimley-Horn

Representatives from the 11 airports who have not seen a full recovery in concessionaire staffing were asked to provide an estimate of overall concessionaire staffing levels in comparison to 2019. Six airports provided estimates, which are presented in **Figure 1-20**. Five other airports elected not to provide this data. As shown, more than half of the six respondent airports estimated concessionaire staffing levels to be less than 80 percent of 2019. The average estimated staffing level among respondent airports was 72.9 percent of 2019 levels. Similar to airport sponsors, many concessionaire operators are struggling to compete with other comparable off-airport positions due to the limited flexibility in location and pay offered at airports. Given this, it is likely staffing shortages will continue for concessionaires until there is a shift in the national labor market.

Figure 1-20: 2021 Concessionaire Staffing Levels vs. 2019
Number of Airports Reporting Levels within Range



Note: Figure only includes the six airports who reported concessionaire staffing had not returned to 2019 levels. Five airports elected not to provide staffing estimates.
Sources: Year-end 2021 COVID-19 Airport Outreach Survey, Kimley-Horn

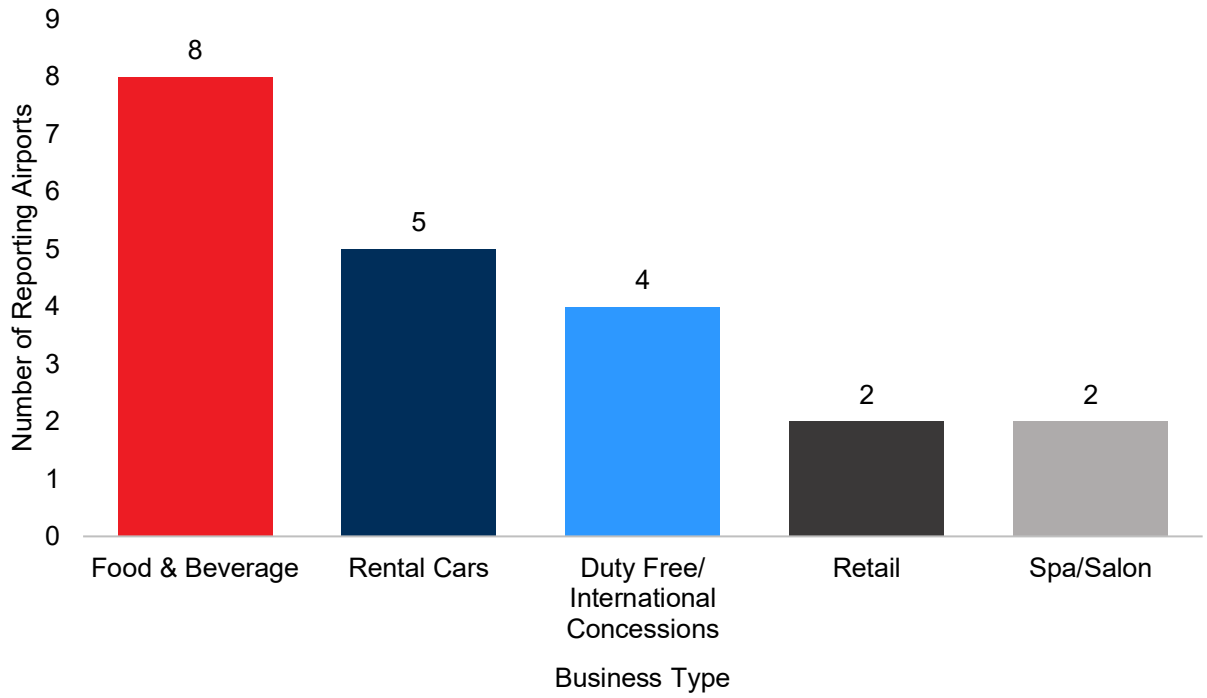
Although most airport concessionaires are recovering, some types of businesses were more severely impacted or have been slower to return to normal operations. As such, airport representatives were asked to identify specific company types that were particularly hart-hit by the loss of passenger traffic or those who have been slow to recover. The responses of this survey question are presented in **Figure 1-21.** Each business reported by airports was grouped into one of the following types:

- Food and Beverage
- Rental Cars
- Duty Free/International Concessions
- Retail
- Spa/Salon

Eighteen airports provided responses to this inquiry. Some airports reported multiple types of business that were lagging, while two airports indicated that no single type of business lagged behind the rest.

Food and beverage concessions are typically the most common type of business in an airport terminal and are almost solely dependent on passenger traffic to generate revenue, with some support from airport employees. As such, food and beverage concessionaires were the most common business type to be identified as a hard-hit or slow recovering business. Several airports indicated that restaurants either permanently closed or consolidated operations to one location in the airport. Concessions and rental car operators were both commonly identified as the slowest-recovering businesses, primarily due to staff limitations and limited availability of vehicles in the national inventory, respectively. Duty-free/international shopping concessions have also been impacted due to the very slow recovery of international service at most airports. Finally, retail stores and spas/salons were reported as being slow to recover, likely because of a general unwillingness among customers to spend money on non-essential products and services during times of economic uncertainty. While some businesses lag behind others in their path to recovery, airports have generally ended financial assistance programs for concessionaires and other onsite business tenants. Only three airports (DAB, Jacksonville International [JAX], and Miami International [MIA]) reported providing financial assistance to tenants at the end of 2021, in stark contrast to the 18 airports who reported offering aid in 2020.

Figure 1-21: Hard-Hit and Slow-to-Recover Business Types



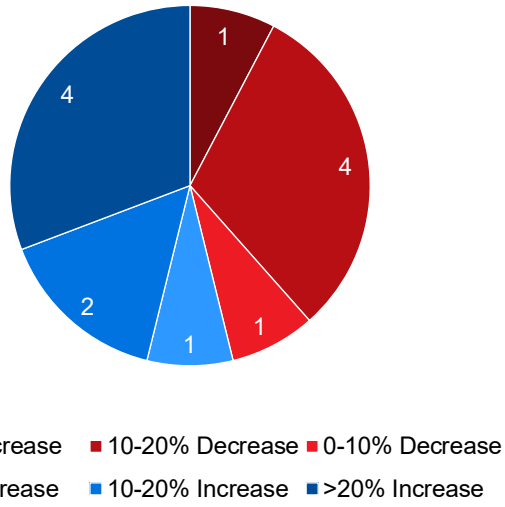
Sources: Year-end 2021 COVID-19 Airport Outreach Survey, Kimley-Horn

1.3.6. Airport Recovery

Despite the ongoing pandemic, Florida's commercial service airport system is well on its way to recovery as passenger traffic and business activities increase around the state. In this analysis, airport representatives discussed operational and financial plans they have implemented to remain on this upward path towards recovery. Generally, airports plan to operate as normally as possible and follow industry best practices to navigate future economic and social conditions. All airports are working diligently to restore public confidence in flying and to provide the highest possible level of service for aviation users. Each airport is unique and will be influenced by many different factors, but no airport reported planning to make any significant changes to airport operating practices in FY2022. Some airports continue on their path to recovery, while others look to capitalize on strong market conditions to expand the airlines and destinations being served at the airport. Airport representatives were asked to provide any future passenger traffic projections that have been developed during the pandemic. These projections are considered in the development of the airport-specific passenger traffic forecasts discussed in **Chapter 3.**

Airport representatives were also asked to provide their airport's FY2022 operating revenue budget to give context moving forward. In total, 13 representatives provided the FY2022 budgeted operating revenues for their airports. As shown in **Figure 1-22**, more than half of the respondent airports budgeted their FY2022 operating revenues above FY2019 actuals. On average, FY2022 budgets are 5.4 percent higher than FY2019, with some airports (Sarasota/Bradenton International [SRQ]) exceeding FY2019 actuals by more than 30 percent. Only one airport budgeted FY2022 revenues to be more than 20 percent lower than FY2019. Many airport representatives remarked that the FY2022 operating revenues were budgeted conservatively to produce a small buffer in the event of another downturn. As such, the actual FY2022 operating revenues may be even with or exceed FY2019 levels.

Figure 1-22: FY2022 Airport Budgeted Operating Revenues vs. 2019 Actual
Number of Airports Reporting Revenue Changes within Range



Sources: Year-end 2021 COVID-19 Airport Outreach Survey, Kimley-Horn

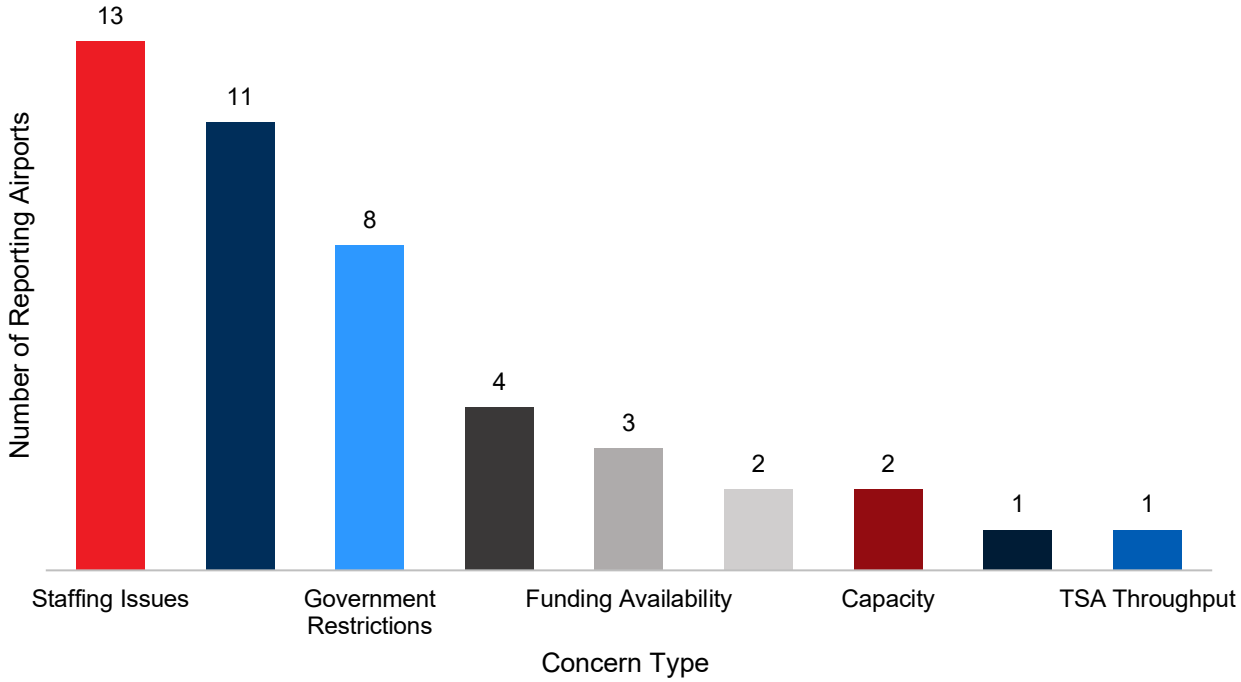
Although most airports have reached or are nearing full recovery, significant challenges exist within the industry that could jeopardize future prosperity of airports and airlines. Airport representatives were asked to identify up to three of their most prevalent concerns about their airport's growth moving forward. Representatives listed a variety of concerns, but most could be grouped into the following categories:

- Staffing Issues
- Supply Chain Issues
- Government Restrictions
- Inflation
- Funding Availability
- General Industry Recovery
- Capacity

Staffing and supply chain issues were by far the most common concern across all airports, as 13 of the 18 respondent airports identified one or both of these factors as an area of concern. As discussed previously, nearly all aviation businesses and airports are experiencing some form of staffing or supply chain issues, impacting the daily operations and long-term development plans of airports.

Eight airports noted government restrictions as a primary concern. Interestingly, these airports all completed their outreach interviews in December 2021, while the 10 airports that did not identify government restrictions were interviewed in early- to mid-November 2020, before the Omicron variant was prevalent in the U.S. The rapid change in common concerns further illustrates the fast-moving nature of the pandemic. Other concerns reported by multiple airports included inflation and funding ability, both of which would impact future development or construction airports. Two airports identified general industry recovery as a concern. In these cases, representatives cited the return of both international air traffic and global tourism as factors in their airport's future growth. Two airports also reported future capacity as a concern, however, representatives from each noted that capacity had been a concern prior to the pandemic. Although these challenges seem daunting, the aviation industry is highly innovative and can adapt to even the most extraordinary circumstances. **Figure 1-23** presents the count of airports that reported each major type of concern.

Figure 1-23: Concerns to Future Recovery/Growth
Number of Airports Reporting Each Concern



Sources: Year-end 2021 COVID-19 Airport Outreach Survey, Kimley-Horn

1.4. Summary

Time and time again, Florida's commercial service airports have proved to be leaders within the aviation industry. This excellence has never been more apparent than during the COVID-19 pandemic, which swept around the globe and forever changed how we as people live. In the two years since the pandemic began, Florida has experienced both unparalleled declines and unrivaled growth.

This analysis sought to document the pandemic's ongoing impacts and the actions taken by Florida airports to come back from the pandemic stronger than ever. The impacts ranged from a dramatic decline in passenger air travel to significant changes in airport and aviation business labor market. Florida's airports worked in conjunction with other aviation businesses and airport stakeholders to minimize the negative impacts of the pandemic and to preserve the businesses and operations that are so vital to their local communities. While challenges persist in the industry and the global economy, the state's airports are working to overcome the obstacles today and in years to come, helping to secure the economic and social well-being of Florida well into the future.

1.5. References

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Chapter 2. Air Service Schedule Assessment

2.1. Introduction

In March 2020, the COVID-19 pandemic (the pandemic) forced governments to adopt global travel restrictions and quarantine measures, which greatly affected the demand for air travel. These travel restrictions, as well as a general fear of the pandemic, resulted in a steep reduction of air travel activity. Airlines were compelled to drastically cut system capacity by cancelling scheduled flights, both domestic and international, which matched the decline in passenger traffic seen across the globe.

In 2021, the impacts of the pandemic began to lessen with the introduction of vaccines and easing of travel restrictions, among other factors. Air travel, particularly among leisure travelers, began to increase rapidly. This resulted in airlines beginning to increase capacity and add destinations to their service network. Many of Florida's airports have experienced an uptick in activity to accommodate the resurgence leisure travelers starting shortly after the pandemic's onset. This rebound has helped many Florida airports achieve complete recovery and even exceed pre-COVID levels of activity.

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

2.2. Background

Airline schedule data from OAG was compiled to assess the pandemic's impacts on airline schedules and resulting passenger activity among Florida's airports. OAG is a global provider of aviation data for airports, airlines, and other stakeholders, which enables them to assess the historical, current, and future activity in the aviation industry. This assessment uses the OAG Schedule Analyzer to compile three complete years of airline schedule data: 2019, 2020, and 2021. This data includes records for all scheduled flights that either originate and/or terminate at a Florida commercial service airport and include 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 note that this data does not reflect the exact number of airline flights that operated from each of Florida's airports each month. Airlines make schedule decisions daily and it is unknown whether all airline scheduling decisions are reflected 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 and arrival frequency. As such, the airline schedule data reported in this chapter should only be used for reviewing general scheduling trends recognized across Florida's commercial service airports.

2.3. Analysis Methodology

The methodology to assess commercial service airline schedules used Year-over-Year (YoY) comparisons of data between 2019 and 2021 for two 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.
- **Number of destinations served:** The number of monthly interstate destinations offering scheduled service from all the Florida commercial service airports.

Since scheduled departure data closely correlates with arrival flight data, the schedule analyses incorporate data for departures only.

2.4. Schedule Data Findings

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

- Statewide Level
- FDOT 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 over the world who traveled year-round into Florida.[i] Many domestic leisure passengers travel from northern states during the winter months, as "snowbirds," seeking warmer weather and Florida beaches. Domestic and international leisure visitors utilize school breaks during the summer months to visit the numerous tourism hotspots within the state. Year-round, Florida hosts passenger cruises on both coasts. Florida also serves as a top destination for business traffic in the U.S., especially within the Orlando, Miami, Tampa, and Jacksonville metro areas. The following analysis examines changes to airline flight schedules across three years (2019-2021) that is reflective of airline schedules before the pandemic (representing pre-pandemic activity), airline scheduling cuts in response to the pandemic, and airline schedules recovering in response to the resurgence in air travel demand.

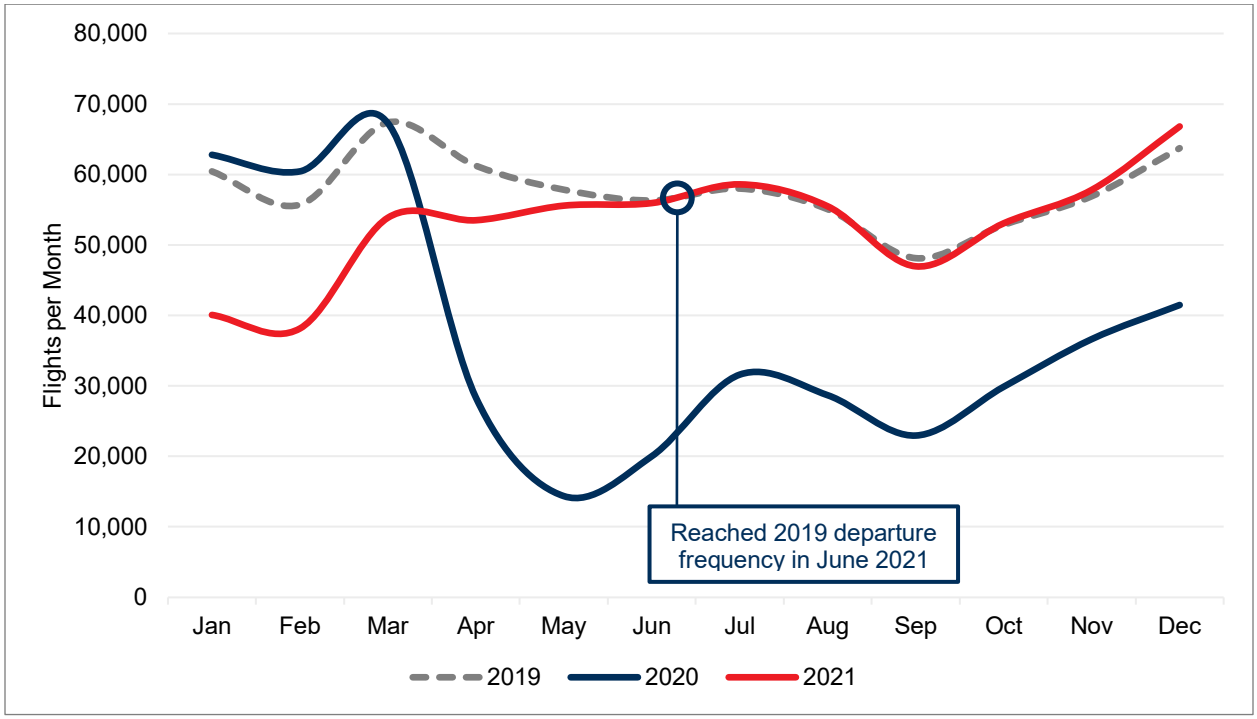
Florida's commercial service airports have historically accommodated one of the largest volumes of air traffic of any state. Despite Florida being ranked as the third most populous state in the U.S., the state recorded the second highest number of enplanements with over 95 million in 2019 (only behind California).[ii,iii] This level of activity was sustained into the early months of 2020. The pandemic started to impact the Florida commercial service airports in April 2020 with airlines scaling back capacity in response to global travel restrictions and a subsequent decline in passenger traffic. By May 2020, scheduled departures were down 75 percent YoY compared to the same month in the prior year. However, airline traffic started to rebound in the latter half of 2020 and by December 2020, statewide scheduled departures were down just 35 percent YoY compared to December 2019. This recovery continued into 2021 and by June 2021, scheduled departures for the combined whole of Florida's commercial service airports had reached 2019 activity levels, which was sustained throughout the remainder of 2021. This contributed to Florida closing the gap in scheduled departures to just over eight percent in 2021 compared to 2019 flight frequency. This strong recovery can mostly be attributed to Florida's numerous tourist hotspots that attracted passengers back to the state. **Table 2-1** presents the scheduled airline departure frequency data recorded statewide in 2019, 2020, and 2021 and **Figure 2–1** illustrates the statewide trends in scheduled airline departure frequency.

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

Month	2019	2020	2021	% YOY Change 2019-2021
January	60,435	62,788	40,071	-33.7%
February	55,715	60,434	38,144	-31.5%
March	67,381	67,273	53,859	-20.1%
April	61,232	28,356	53,503	-12.6%
May	57,834	14,369	55,575	-3.9%
June	56,308	20,027	55,940	-0.7%
July	57,997	31,604	58,593	1.0%
August	55,060	28,675	55,474	0.8%
September	48,123	22,960	46,967	-2.4%
October	52,850	29,880	53,070	0.4%
November	56,905	36,634	57,805	1.6%
December	63,724	41,478	66,808	4.8%
Total	**693,564**	**444,478**	**635,809**	**-8.3%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2021

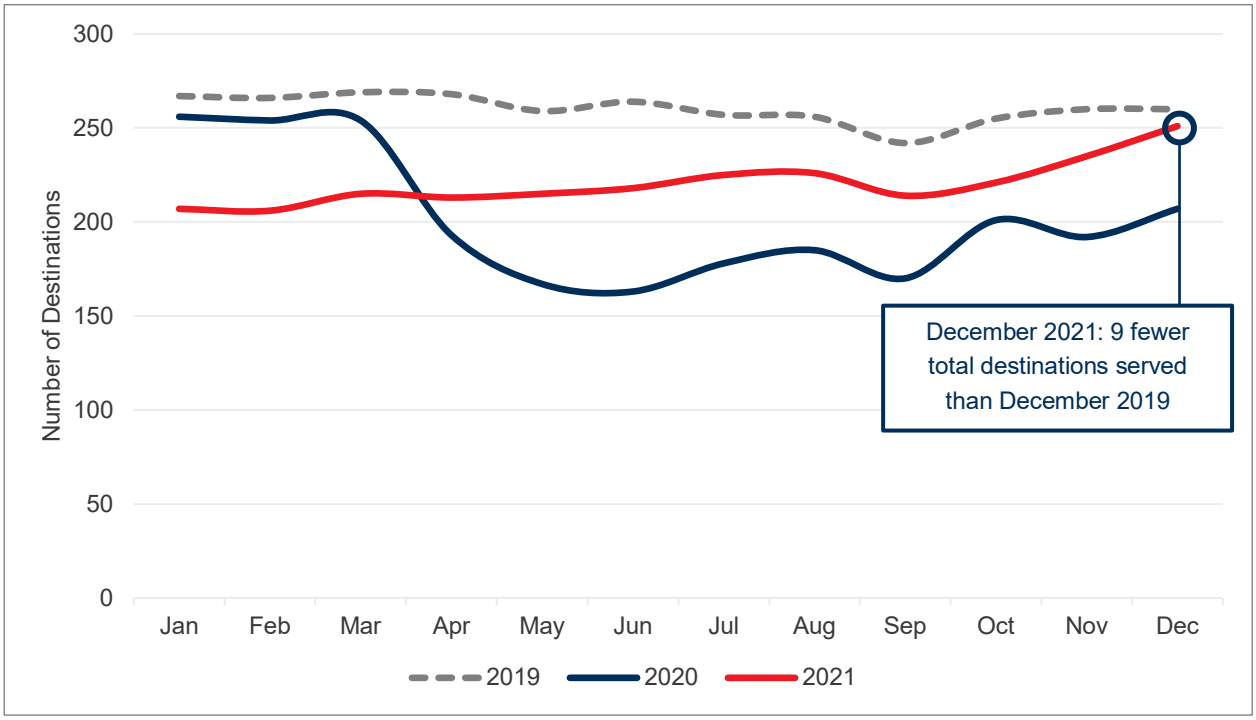
Figure 2-1: Statewide Scheduled Airline Departure Frequency Comparison – International and Domestic



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

The number of domestic interstate and international destinations served from Florida commercial service airports has slowly recovered from the low during the pandemic. Throughout 2019 and into the first three months of 2020, the total number of non-stop domestic and international destinations served from Florida's commercial service airports fluctuated between 242 and 269 due to seasonal market trends.. The impacts of the pandemic to the number of nonstop destinations began in April 2020, and by June 2020, Florida's commercial service airports provided only 163 total nonstop domestic interstate and international destinations—down 38 percent YoY compared to the same month in the prior year. The recovery to pre-pandemic service was slow throughout late 2020 and 2021. However, by December 2021, Florida's commercial service airports were only nine destinations short of the nonstop service availability witnessed in December 2019, which represents 97 percent of pre-pandemic nonstop service availability over a recovery period of a year and a half (June 2020 – December 2021). **Figure 2-2** illustrates the comparison of the total number of nonstop destinations served statewide in 2019, 2020, and 2021.

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

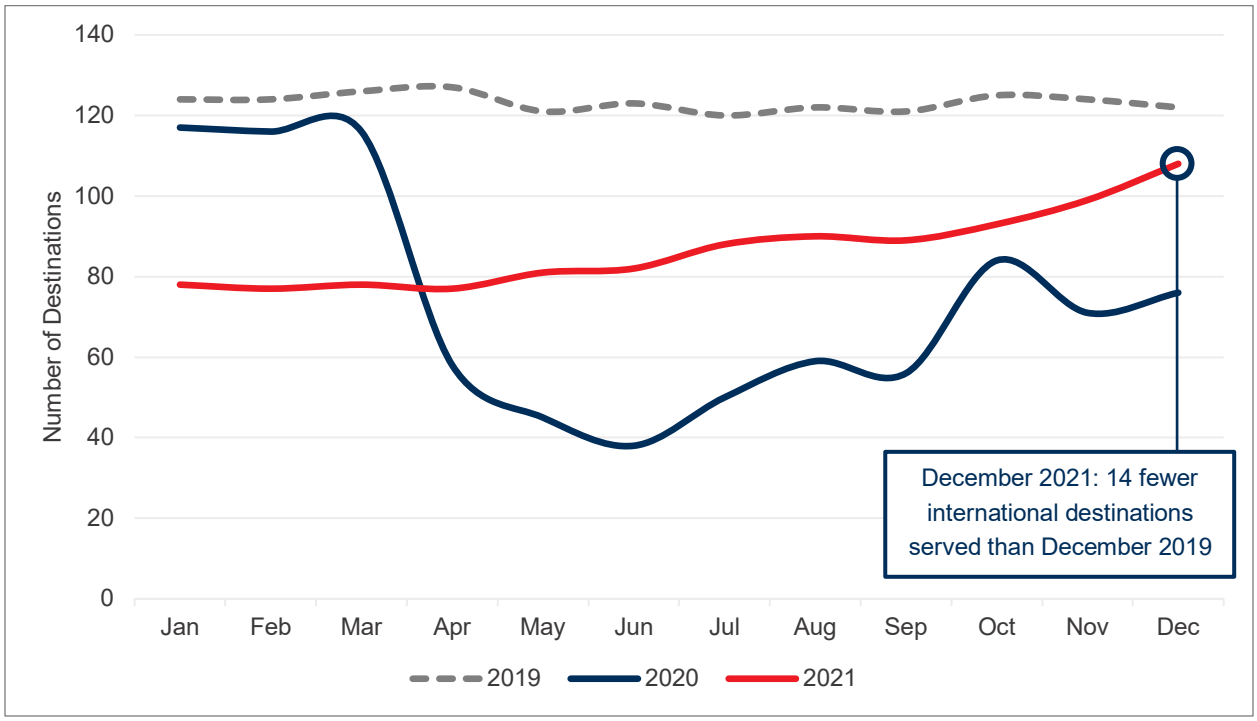


Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Service to international destinations from Florida's commercial service airports was impacted by the pandemic far greater than domestic destinations. In March 2020, Florida's commercial service airports had 116 international nonstop destinations recorded in flight schedules. The pandemic's impact started in April 2020 and by June 2020, airlines had cut 67 percent of international destinations from flight schedules to a low of 38 international destinations. However, airlines began to add international destinations back to their schedules in response to foreign travel restrictions being lifted and an increase in global travel demand witnessed across some international markets (in particular with Latin America and the Caribbean). By December 2021, Florida's commercial service airports were serving only 14 fewer international nonstop destinations—down 11 percent compared to December 2019, which recorded 122

international destinations. International service will likely remain depressed until all foreign travel restrictions are lifted. **Figure 2-3** illustrates the comparison of the total international nonstop destinations served in 2019, 2020, and 2021.

Figure 2-3: Statewide Number of International Nonstop Destinations Served

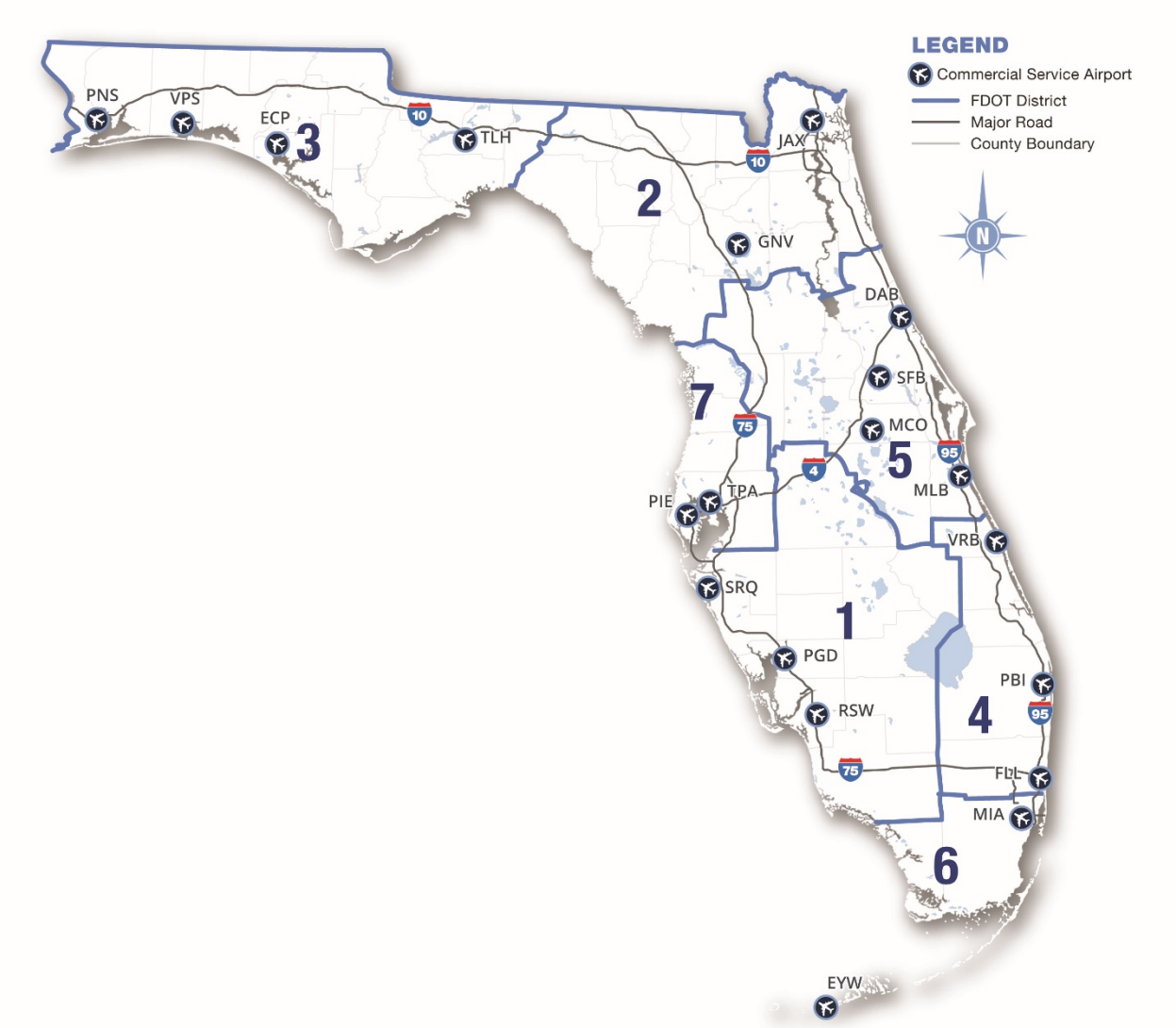


Sources: OAG Schedule Analyzer, Kimley-Horn 2021

2.4.2. FDOT District Level

As illustrated in **Figure 2-4,** the Florida aviation system is organized by seven FDOT Districts, spanning from District 3 in the panhandle to District 6, covering the Florida Keys. The FDOT Districts oversee major functions, such as administration, planning, production, and funding at the airports within each FDOT District. Each FDOT District has unique economic and demographic characteristics that influence airline service and passenger traffic trends. COVID-19 has spread across each of the FDOT Districts at different rates, disproportionately impacting certain regions. Due to these noted differences, a separate analysis was conducted for each FDOT District to account for any socioeconomic and pandemic-related factors that are unique to each FDOT District. The following subsections provide summaries of COVID-19 impacts to airline schedules in each FDOT District. It should be noted that the following FDOT District analyses include both domestic intrastate and international nonstop flights and destinations served.

Figure 2-4: FDOT District Map

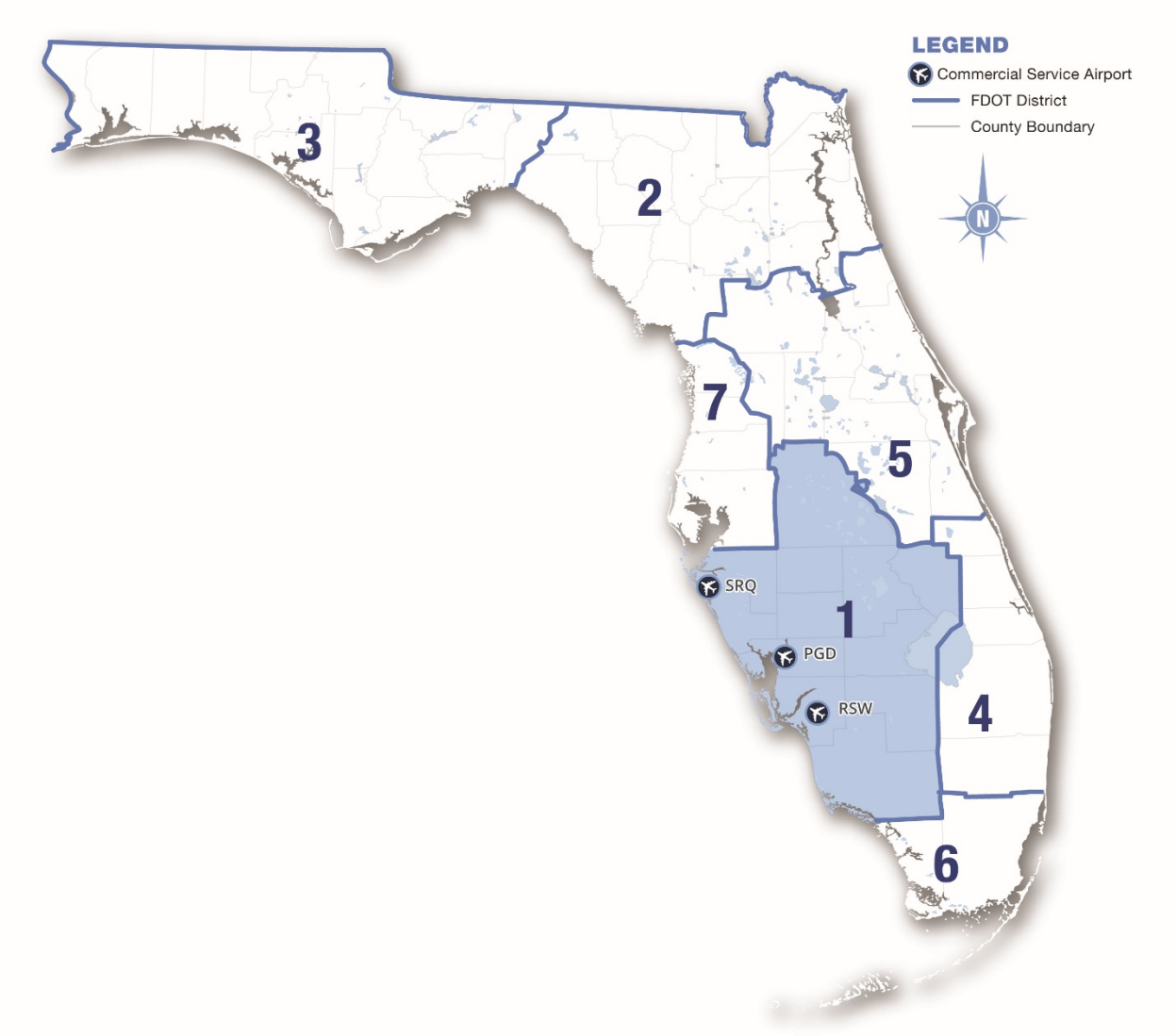


Sources: FDOT, 2020; Kimley-Horn, 2022

2.4.2.1. District 1

District 1 comprises 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 (see **Figure 2-5**).

Figure 2-5: FDOT District 1 Map



Sources: FDOT, 2020; Kimley-Horn, 2022

Along with 2.7 million residents, District 1 includes popular beach cities and towns, such as Fort Myers, Sarasota, and Naples that bring in a large inflow of tourism. The three commercial service airports in District 1 include:

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

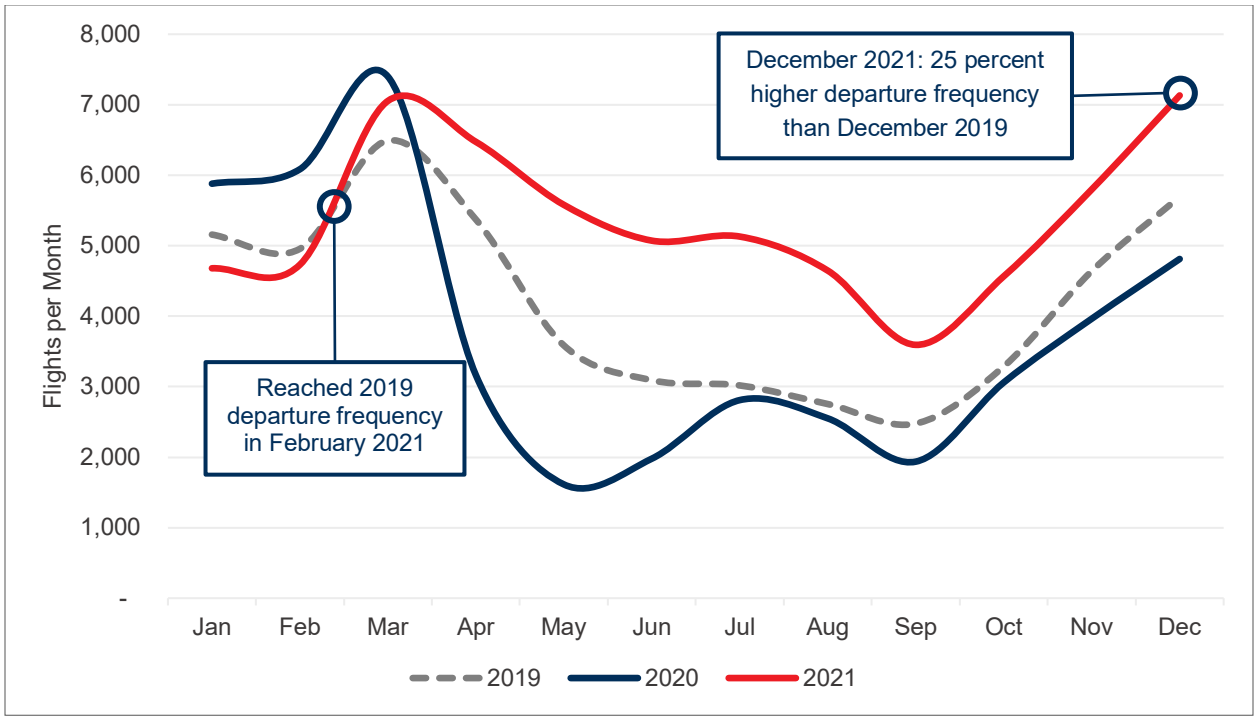
District 1 airports have historically witnessed the highest scheduled departure frequency in the spring and winter months in response to the large influx of leisure travelers to the region during those peak periods. This activity trend was reflected in quarter 1 (Q1) 2020 with District 1 airports accommodating one of the highest levels of activity in February and March 2020. The pandemic resulted in a sharp decline in scheduled departures in April 2020 and by May 2020, scheduled departures were 55 percent lower YoY than the same month in the prior year. The rate of recovery in scheduled departures varied throughout the remainder of 2020 with District 1 reaching within seven percent of pre-pandemic activity in July and October 2020. But by February 2021, District 1 reached pre-pandemic activity levels and throughout the remainder of the year sustained a higher activity level than 2019. This meant 2021 resulted in a record total scheduled departure frequency that was over 27 percent higher YoY than 2019, a strong indication of complete recovery for District 1 airports. **Table 2-2** presents the scheduled departure frequency data recorded across District 1 airports in 2019, 2020, and 2021 and **Figure 2-6** illustrates the trends in scheduled airline departure frequency.

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

Month	2019	2020	2021	% YoY Change 2019-2021
January	5,158	5,880	4,680	-9.3%
February	4,956	6,085	4,731	-4.5%
March	6,492	7,400	7,054	8.7%
April	5,373	3,165	6,474	20.5%
May	3,586	1,614	5,580	55.6%
June	3,092	1,979	5,072	64.0%
July	3,018	2,810	5,130	70.0%
August	2,754	2,551	4,647	68.7%
September	2,477	1,937	3,594	45.1%
October	3,287	3,060	4,566	38.9%
November	4,640	3,964	5,798	25.0%
December	5,693	4,812	7,132	25.3%
Total	**50,526**	**45,257**	**64,458**	**27.6%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2021

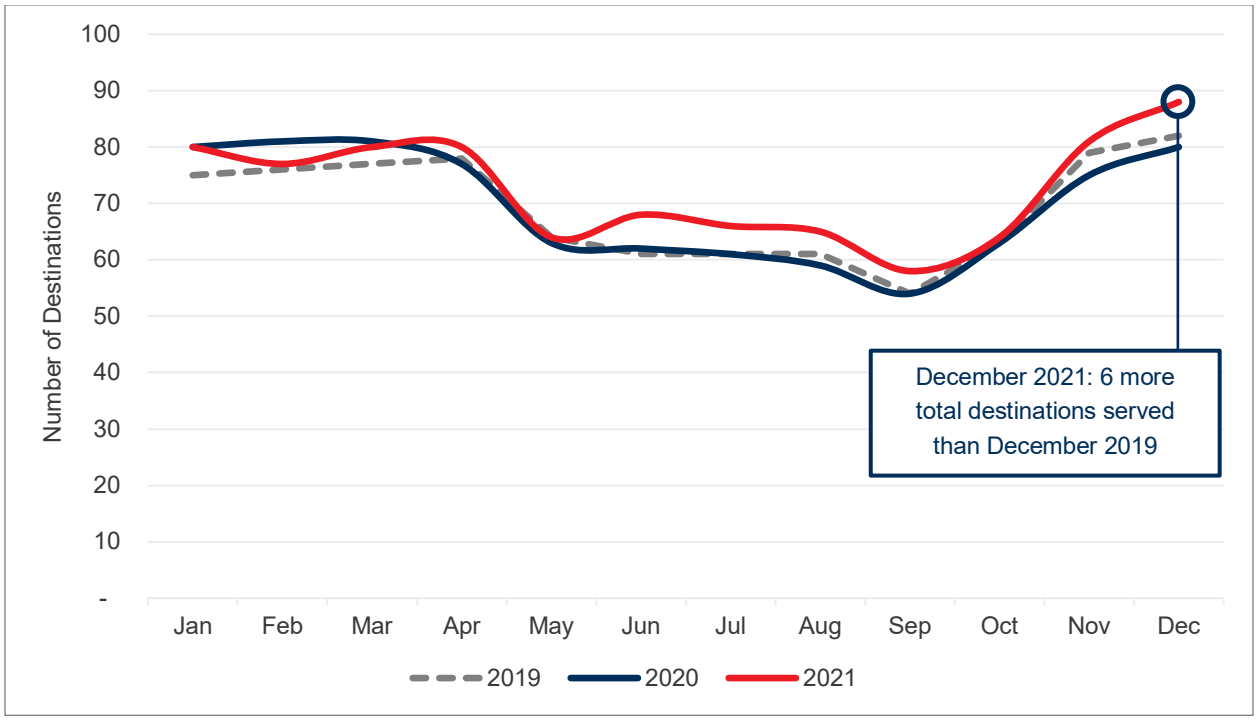
Figure 2-6: District 1 Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

The total number of domestic and international nonstop destinations served across District 1 airports have historically followed a similar trend as scheduled departure frequency, with airlines adding more destinations in the spring and winter months in response to greater leisure travel demand. Despite the pandemic resulting in airlines cutting schedules, District 1 airports did not witness a notable loss in nonstop destinations served. In fact, the District 1 airports recorded several months in 2021 with additional destinations that were not originally served in 2020 or 2019. In December 2021, District 1 airports served six more destinations than the same month in 2019 and new airline service from Avelo Airlines at RSW, Southwest Airlines at SRQ, and Sun Country Airlines at PGD.[iv,v,vi] **Figure 2-7** illustrates the trend in the total number of nonstop destinations served from District 1 airports.

Figure 2-7: District 1 Number of Nonstop Interstate and International Destinations Served

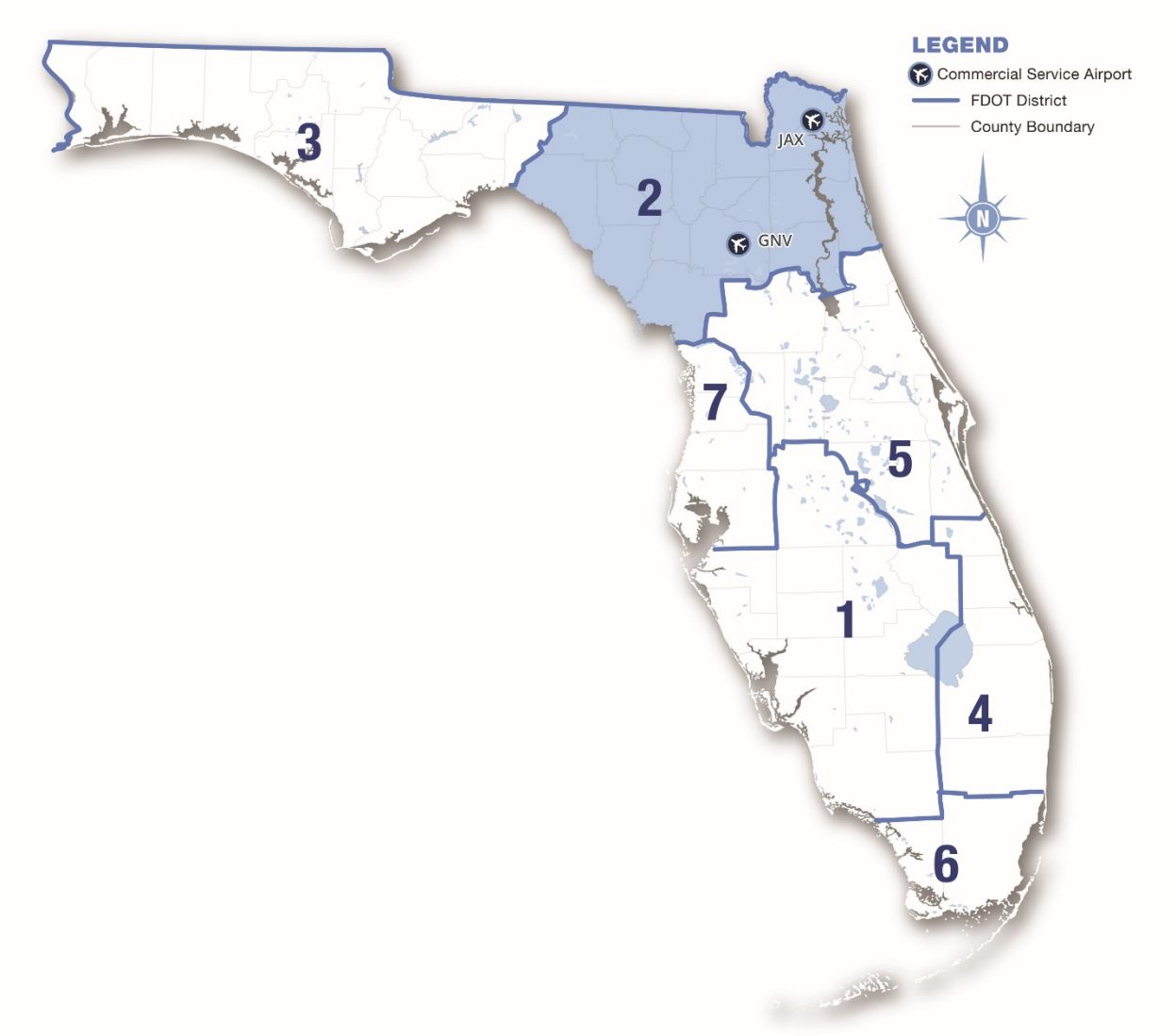


Sources: OAG Schedule Analyzer, Kimley-Horn 2021

2.4.2.2. District 2

District 2 comprises 18 counties within the northeast region of the state, starting midway through the panhandle and extending past Gainesville (see **Figure 2-8**).

Figure 2-8: FDOT District 2 Map



Sources: FDOT, 2020; Kimley-Horn, 2022

There are an estimated 1.9 million residents in District 2, with the largest population concentration centered in Jacksonville along the Atlantic coast and close to the Georgia border. Gainesville is the other populous city in the region, with the University of Florida attracting numerous college students, faculty, and visitors to the area. The two commercial service airports in District 2 include:

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

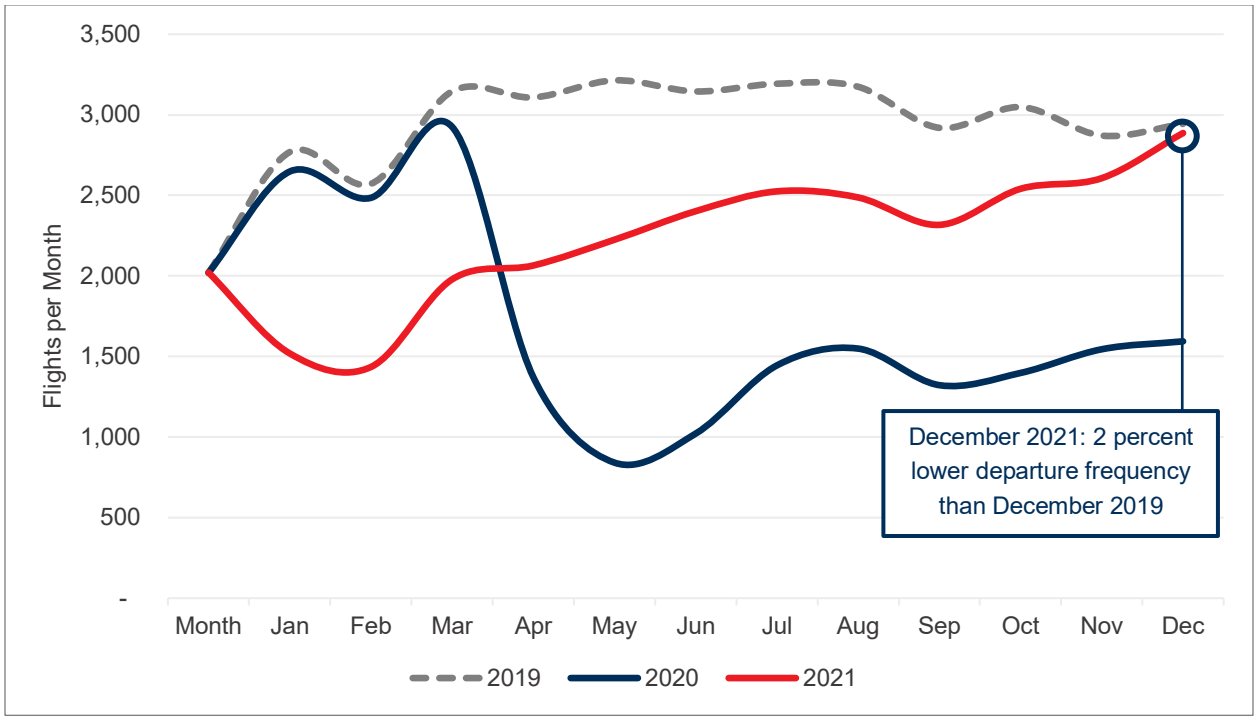
In 2019, District 2 airports recorded a relatively consistent level of scheduled departures throughout the year. This trend was closely followed in Q1 2020 until the pandemic resulted in airlines cutting schedules starting in April 2020. By May 2020, scheduled departures were down nearly 74 percent YoY compared to the same time in the prior year. However, this cut was quickly followed by airlines slowly adding flights in response to travel demand returning to District 2. This recovery continued through the remainder of 2020 and throughout 2021. By December 2021, monthly scheduled departures were four percent lower YoY than the same month in 2019, an indication of a strong recovery for District 2 over a year and a half timespan (May 2020 – December 2021). This resulted in 25 percent lower scheduled departures than 2019, a modest improvement from 2020, which recorded more than 44 percent less scheduled departures than 2019. **Table 2-3** presents the scheduled departure frequency data recorded across District 2 airports in 2019, 2020, and 2021 and **Figure 2-9** illustrates 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	2021	% YoY Change 2019-2021
January	2,769	2,648	1,519	-45.1%
February	2,572	2,485	1,435	-44.2%
March	3,146	2,925	1,979	-37.1%
April	3,108	1,371	2,065	-33.6%
May	3,214	841	2,225	-30.8%
June	3,145	1,022	2,402	-23.6%
July	3,193	1,445	2,525	-20.9%
August	3,174	1,549	2,487	-21.6%
September	2,919	1,322	2,317	-20.6%
October	3,048	1,398	2,541	-16.6%
November	2,871	1,545	2,607	-9.2%
December	2,944	1,594	2,887	-1.9%
Total	**36,103**	**20,145**	**26,989**	**-25.2%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2021

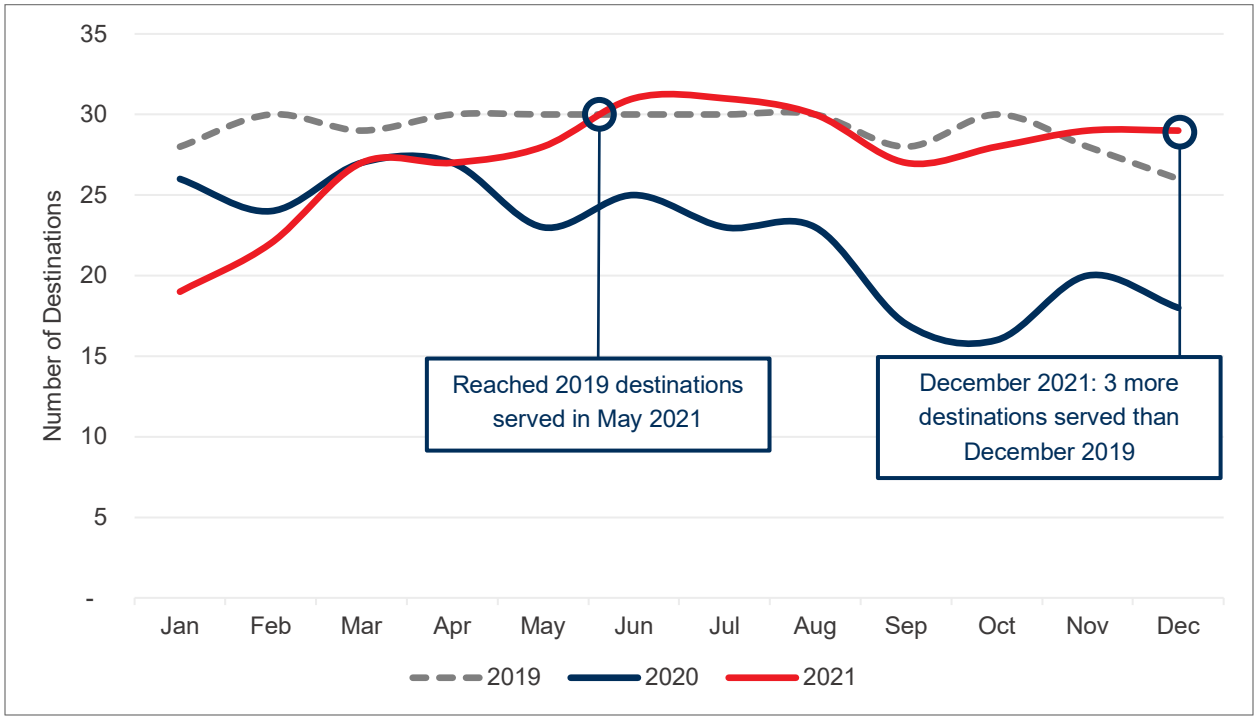
Figure 2-9: District 2 Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

District 2 airports served between 26 and 30 nonstop destinations throughout 2019. In 2020, the total nonstop destinations served were consistently lower than 2019 with September and October 2020 recording only 17 and 16 nonstop destinations served, respectively. However, the first half of 2021 saw airlines starting to add back destinations, which continued through May 2021 when District 2 reached its pre-pandemic level of nonstop service. This level of nonstop service availability was sustained throughout the remainder of 2021, indicating a strong recovery in nonstop destinations served from District 2 airports. **Figure 2-10** illustrates the trend in the total nonstop destinations served by District 2 airports in 2019, 2020, and 2021. Note that international service represents a very small portion of the total destinations available from District 2 airports.

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

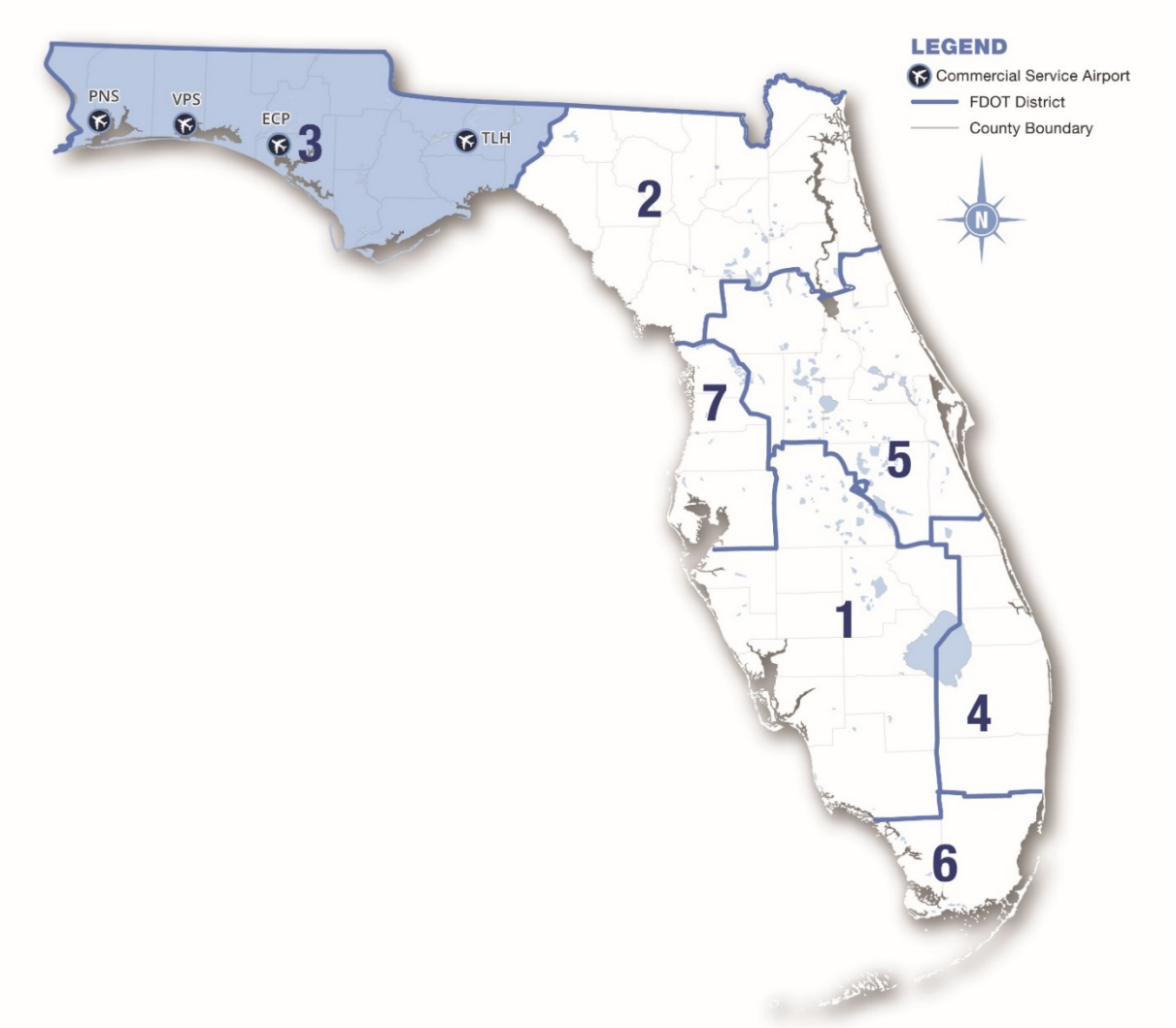


Sources: OAG Schedule Analyzer, Kimley-Horn 2021

2.4.2.3. District 3

District 3 comprises 16 counties within the northwest region of the state, covering the majority of the Florida Panhandle (see **Figure 2-11**).

Figure 2-11: FDOT District 3 Map



Sources: FDOT, 2020; Kimley-Horn, 2022

There are an estimated 1.4 million residents in District 3, with several major population centers, including Destin/Fort Walton, Panama City, Pensacola, and Tallahassee. Each of these cities are supported by their own commercial service airports, which attract both leisure and business traffic. The four commercial service airports in District 3 include:

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

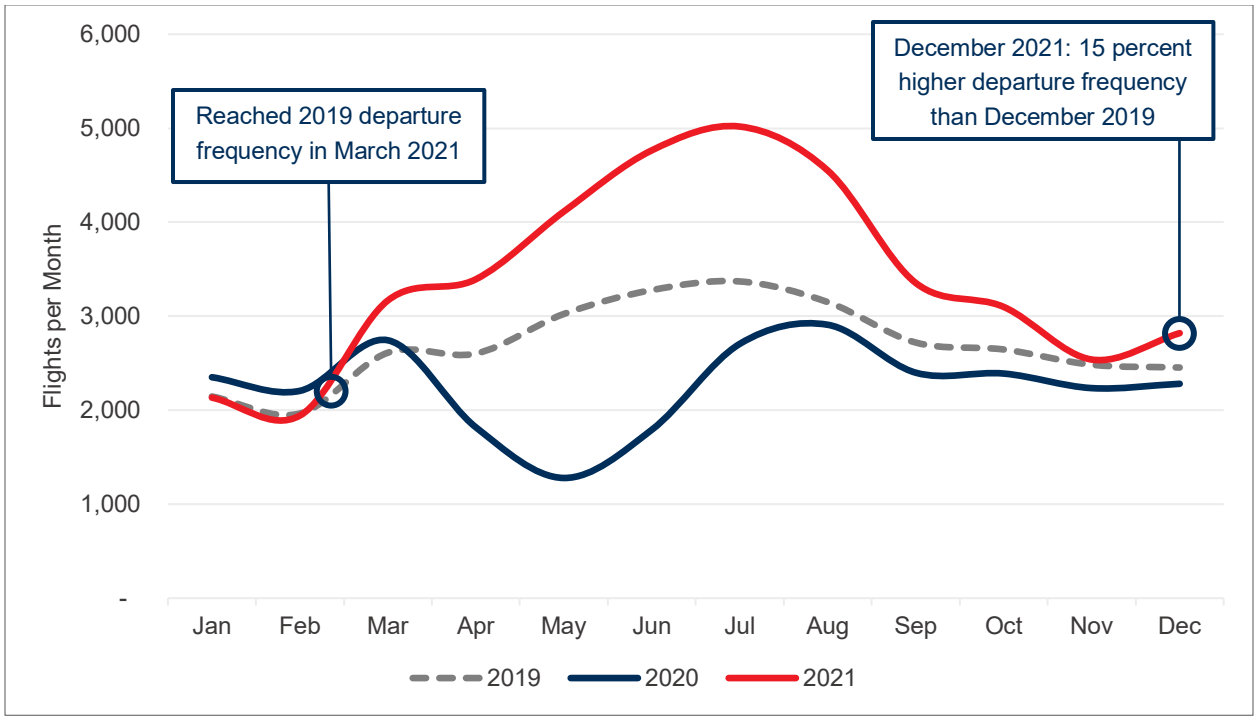
District 3 airports historically have higher levels of activity in the summer months due to the Florida Panhandle being a popular summer vacation location for leisure travelers. The pandemic first impacted the District 3 airports in April 2020 with a sharp decline in scheduled departures. By May 2020, scheduled departures were 58 percent lower YoY compared to the same month in 2019. However, airlines quickly started adding flights back to the District 3 airports in June and July 2020 to allow District 3 airports to reach within 15 percent of pre-pandemic activity levels in the latter half of 2020 and the first few months of 2021. By March 2021, District 3 airports reached pre-pandemic activity levels and exceeded 2019 activity in the summer months to accommodate the new influx of leisure travel. This record level of activity resulted in 26 percent higher scheduled departures YoY in 2021 than 2019 across the District 3 airports—a strong indication of recovery from the pandemic. **Table 2-4** presents the scheduled departure frequency data recorded across District 3 airports in 2019, 2020, and 2021 and **Figure 2-12** illustrates 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	2021	% YoY Change 2019-2021
January	2,146	2,351	2,134	-0.6%
February	1,965	2,206	1,943	-1.1%
March	2,612	2,744	3,168	21.3%
April	2,603	1,818	3,393	30.3%
May	3,024	1,279	4,114	36.0%
June	3,278	1,792	4,765	45.4%
July	3,370	2,706	5,018	48.9%
August	3,150	2,909	4,550	44.4%
September	2,720	2,399	3,354	23.3%
October	2,646	2,390	3,099	17.1%
November	2,484	2,235	2,539	2.2%
December	2,454	2,281	2,820	14.9%
Total	**32,452**	**27,110**	**40,897**	**26.0%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2021

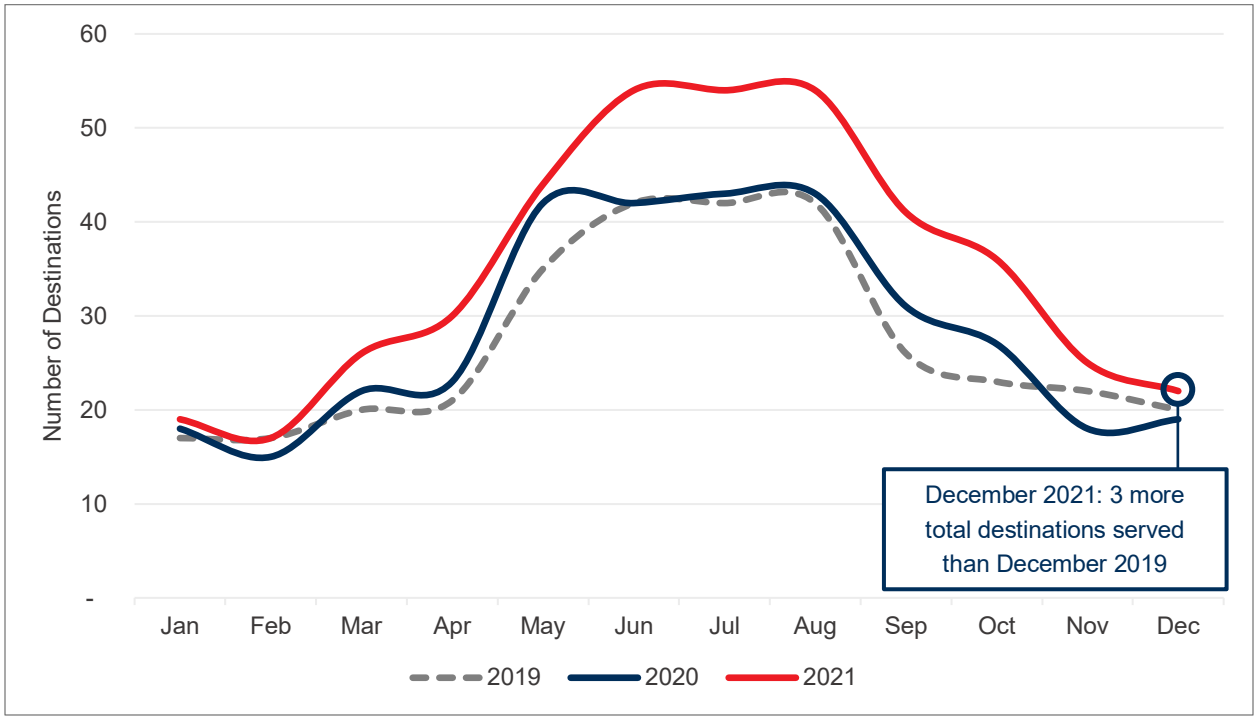
Figure 2-12: District 3 Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Unlike the trend in scheduled departures, District 3 airports generally served more nonstop destinations in 2020 (47 unique destinations) and 2021 (56 unique destinations) compared with 2019 (42 unique destinations). **Figure 2-13** illustrates the trend in the total nonstop destinations served with District 3 airports in 2019, 2020, and 2021. Note that international service represents a very small portion of the total destinations available from District 3 airports.

Figure 2-13: District 3 Number of Nonstop Interstate and International Destinations Served

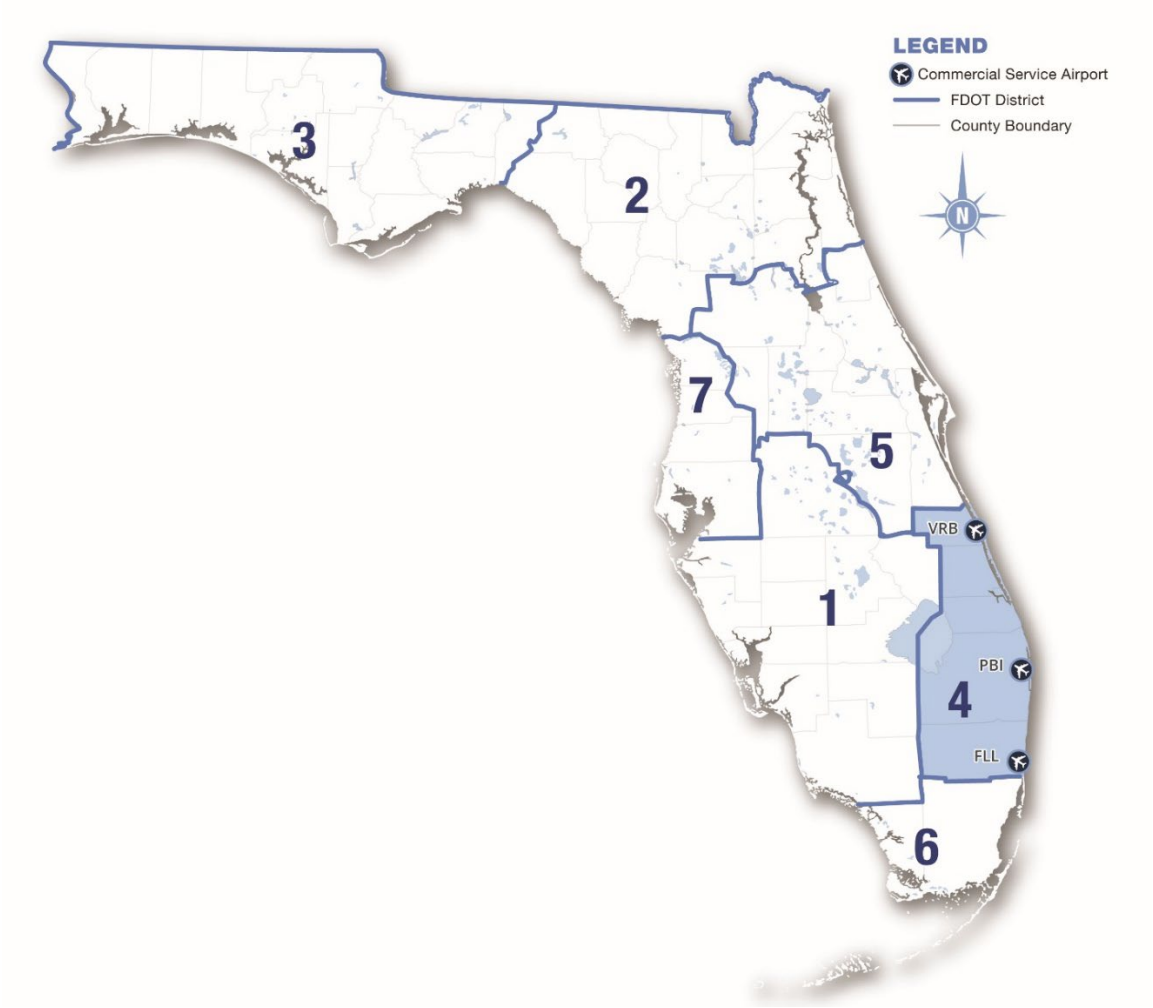


Sources: OAG Schedule Analyzer, Kimley-Horn 2021

2.4.2.4. District 4

District 4 comprises five counties in southeast Florida, just north of the Miami area (see **Figure 2-14**).

Figure 2-14: FDOT District 4 Map



Sources: FDOT, 2020; Kimley-Horn, 2022

Despite the smaller footprint of this FDOT District compared to others, there are two large population centers that are home to 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 local attractions, with Fort Lauderdale also being home to a large cruise port. The three commercial service airports in District 4 include:

- Fort Lauderdale/Hollywood International Airport (FLL)
- Palm Beach International Airport (PBI)
- Vero Beach Airport (VRB)[1]

[1] As of 02/01/22, VRB is classified as a nonprimary airport in the FAANPIAS. The airport is still included in this assessment to reflect the previous NPIAS classification as a primary non-hub airport.

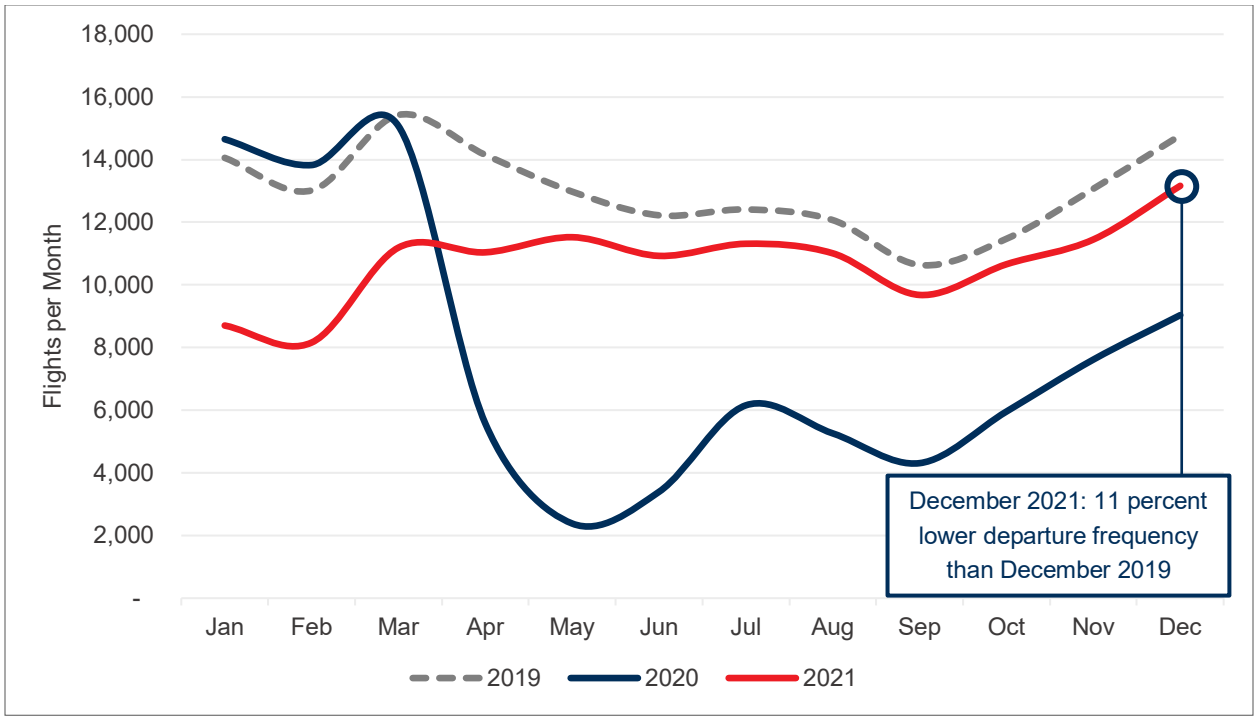
Historically, District 4 airports witnessed a stable level of activity throughout the year. The spring and winter months are popular for leisure travel in southeast Florida, which is reflected across District 4 airports with a relative uptick in activity given the leisure traffic attracted to the region. This allowed Q1 2020 to start very strong for District 4. But similar to other airports, the impacts of the pandemic started in April 2020 with airlines cutting capacity. However, due to the large amount of international traffic that FLL supports, there was a significant drop in District 4 scheduled flights in 2020 in response to foreign travel restrictions being implemented. By May 2020, airlines had cut scheduled departures significantly to be 82 percent lower YoY than May 2019. Despite signs of recovery starting in June 2020, the District 4 airports ended 2020 with over 40 percent lower scheduled departures YoY than 2019. Airlines continued to add more flights into District 4 in 2021 with a notable increase in Q1 and Q2. Despite this, the slow pace of lifting of international travel restrictions has prevented District 4 from reaching pre-pandemic activity. In total, District 4 airports recorded 18 percent lower scheduled departures in 2021 compared to 2019. **Table 2-5** presents the scheduled departure frequency data recorded across District 4 airports in 2019, 2020, and 2021 and **Figure 2-15** illustrates the trend in departure frequency among the three airports in District 4.

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

Month	2019	2020	2021	% YoY Change 2019-2021
January	14,055	14,650	8,703	-38.1%
February	13,015	13,825	8,159	-37.3%
March	15,425	15,071	11,190	-27.5%
April	14,149	5,575	11,039	-22.0%
May	12,976	2,383	11,522	-11.2%
June	12,221	3,395	10,926	-10.6%
July	12,408	6,156	11,313	-8.8%
August	12,068	5,260	11,008	-8.8%
September	10,636	4,310	9,679	-9.0%
October	11,472	5,958	10,659	-7.1%
November	13,068	7,616	11,449	-12.4%
December	14,772	9,034	13,162	-10.9%
Total	**156,265**	**93,233**	**128,809**	**-17.6%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2021

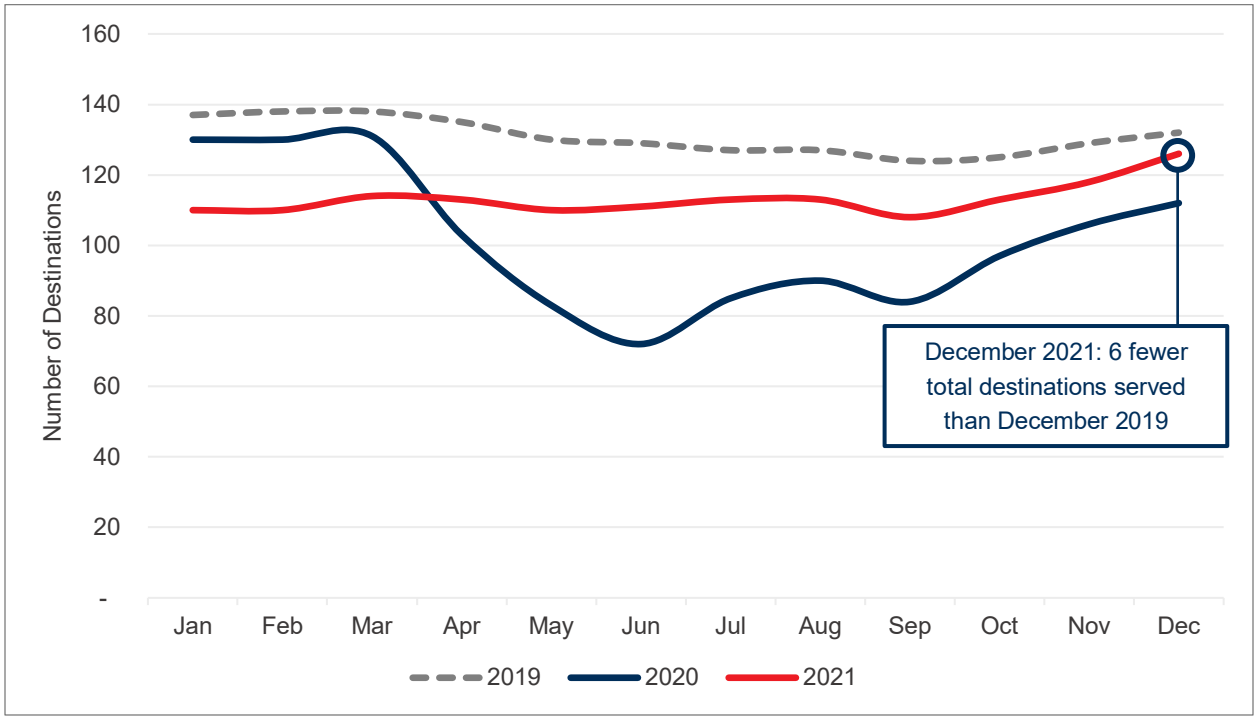
Figure 2-15: District 4 Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Traditionally, airlines operating at District 4 airports offer service to a consistent number of nonstop destinations throughout the year. However, due to the pandemic and the subsequent adoption of international travel restrictions, airlines reduced the number of nonstop destinations offered from District 4 airports by more than 40 percent YoY (57 destinations) in June 2020 compared to the same month in 2019. Airlines started to add back nonstop destinations in October 2020 to allow the FDOT District to serve approximately 85 percent of the destinations served by the end of 2020 as compared with 2019. In 2021, airlines added back more nonstop destinations to close the gap to 95 percent. However, foreign travel restrictions prevented District 4 from reaching the level of nonstop service availability recorded in 2019. **Figure 2-16** presents the number of airline destinations available at District 4 airports.

Figure 2-16: District 4 Number of Nonstop Interstate and International Destinations Served

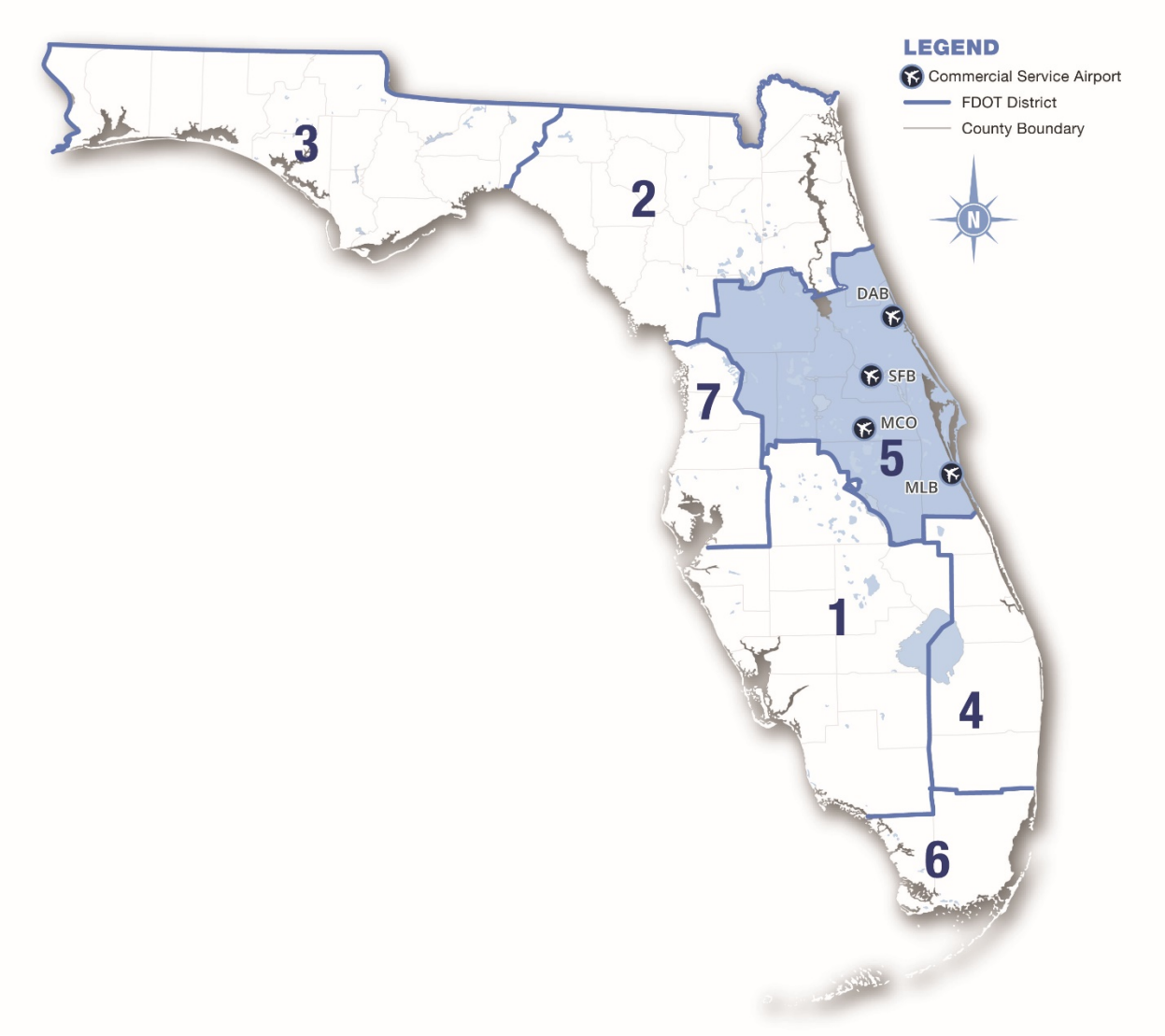


Sources: OAG Schedule Analyzer, Kimley-Horn 2021

2.4.2.5. District 5

District 5 comprises nine counties in east central Florida region (see **Figure 2-17**).

Figure 2-17: FDOT District 5 Map



Sources: FDOT, 2020; Kimley-Horn, 2022

District 5's 4.1 million residents live across several population centers, including Daytona Beach, Melbourne, Orlando, and Titusville. District 5 is home to some of the state's most iconic tourist destinations, including amusement parks like Walt Disney World, Universal Orlando, and SeaWorld Orlando. In addition, Melbourne and Daytona Beach bring in a substantial amount of tourism with extensive beaches and the NASCAR Daytona 500, which takes place every February and attracts hundreds of thousands of fans. District 5 is also home to multiple prestigious universities, including the University of Central Florida, Embry-Riddle Aeronautical University, and the Florida Institute of Technology. Four commercial service airports support District 5's numerous residents, tourists, and business and education travelers, including Florida's busiest commercial service airport and busiest large

hub airport, Orlando International Airport (MCO). The four commercial service airports in District 5 include:

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

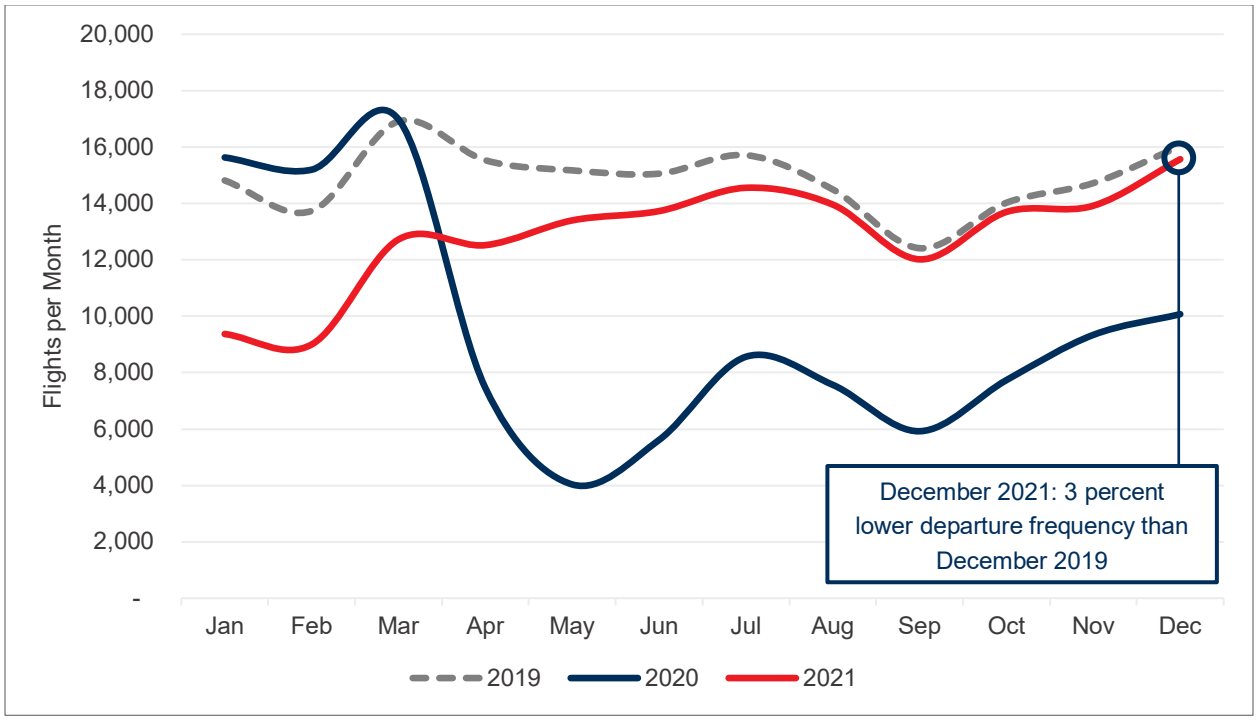
District 5 historically witnessed a stable level of airline traffic throughout the year. Most of the District 5's scheduled passenger traffic is concentrated at the Orlando airports (MCO and SFB). Due to MCO's status as a global hub for tourism, the impacts of the pandemic to schedule volumes were significant. District 5 airports experienced the state's first major decline of scheduled departures in April 2020. By May 2020, District 5 recorded 73 percent lower scheduled departures YoY than the same month in 2019. Departure frequency started to rebound in June 2020 to allow the FDOT District to witness a recovery of over one-third (36 percent) of the lost airline traffic by the end of the year. In response to the COVID-19 vaccine rollout in Q1 and Q2 2021, airlines added back enough flights into District 5 to help the airlines come within three percent of pre-pandemic activity by the end of 2021. In total, District 5 airports accommodated nearly 14 percent fewer scheduled departures in 2021 compared to 2019. **Table 2-6** presents the scheduled departure frequency data recorded across District 5 airports in 2019, 2020, and 2021 and **Figure 2-18** illustrates the trend of scheduled departure frequency among the four airports in District 5.

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

Month	2019	2020	2021	% YoY Change 2019-2021
January	14,815	15,631	9,369	-36.8%
February	13,733	15,196	8,996	-34.5%
March	16,912	16,983	12,721	-24.8%
April	15,531	7,459	12,520	-19.4%
May	15,173	4,034	13,398	-11.7%
June	15,056	5,611	13,728	-8.8%
July	15,711	8,562	14,555	-7.4%
August	14,497	7,566	13,959	-3.7%
September	12,412	5,921	12,016	-3.2%
October	14,025	7,735	13,699	-2.3%
November	14,721	9,338	13,919	-5.4%
December	16,032	10,072	15,568	-2.9%
Total	**178,618**	**114,108**	**154,448**	**-13.5%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2021

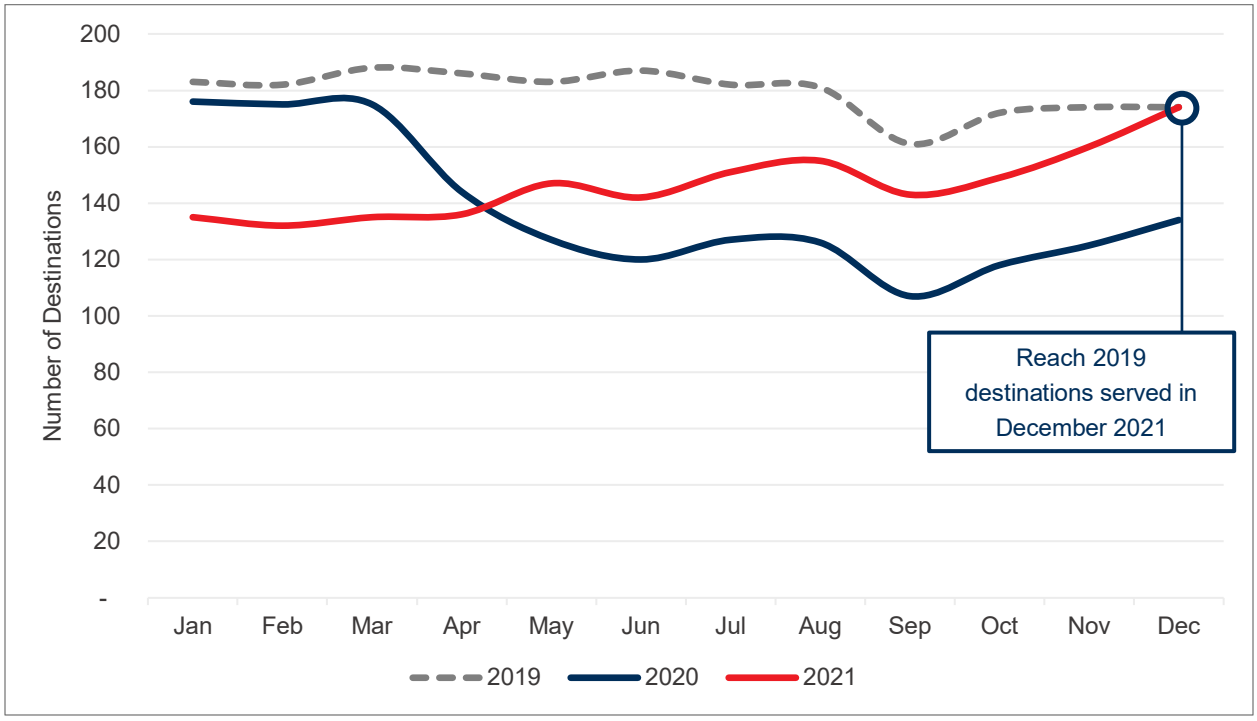
Figure 2-18: District 5 Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Given the popularity of leisure and business travel in the Orlando region, District 5 airports have historically offered service to nearly 140 domestic destinations and 70 international destinations around the globe. This level of nonstop service availability persisted through Q1 2020 before the pandemic resulted in airlines cutting nonstop service availability by more than 35 percent YoY (67 destinations) between April and September 2020. Most of these cuts were centered around international destinations as global travel restrictions were enacted. Airlines began to add back destinations to District 5 in October 2020 and by the end of the year, District 5 was 23 percent short of pre-pandemic nonstop service availability. Further, the introduction of vaccines and subsequent increases in travel demand allowed District 5 to add back enough destinations throughout 2019 to reach pre-pandemic nonstop service availability by December 2021. By his time, nearly all international destinations were also restored to District 5. **Figure 2-19** presents the number of available destinations served at District 5 airports.

Figure 2-19: District 5 Number of Nonstop Interstate and International Destinations Served

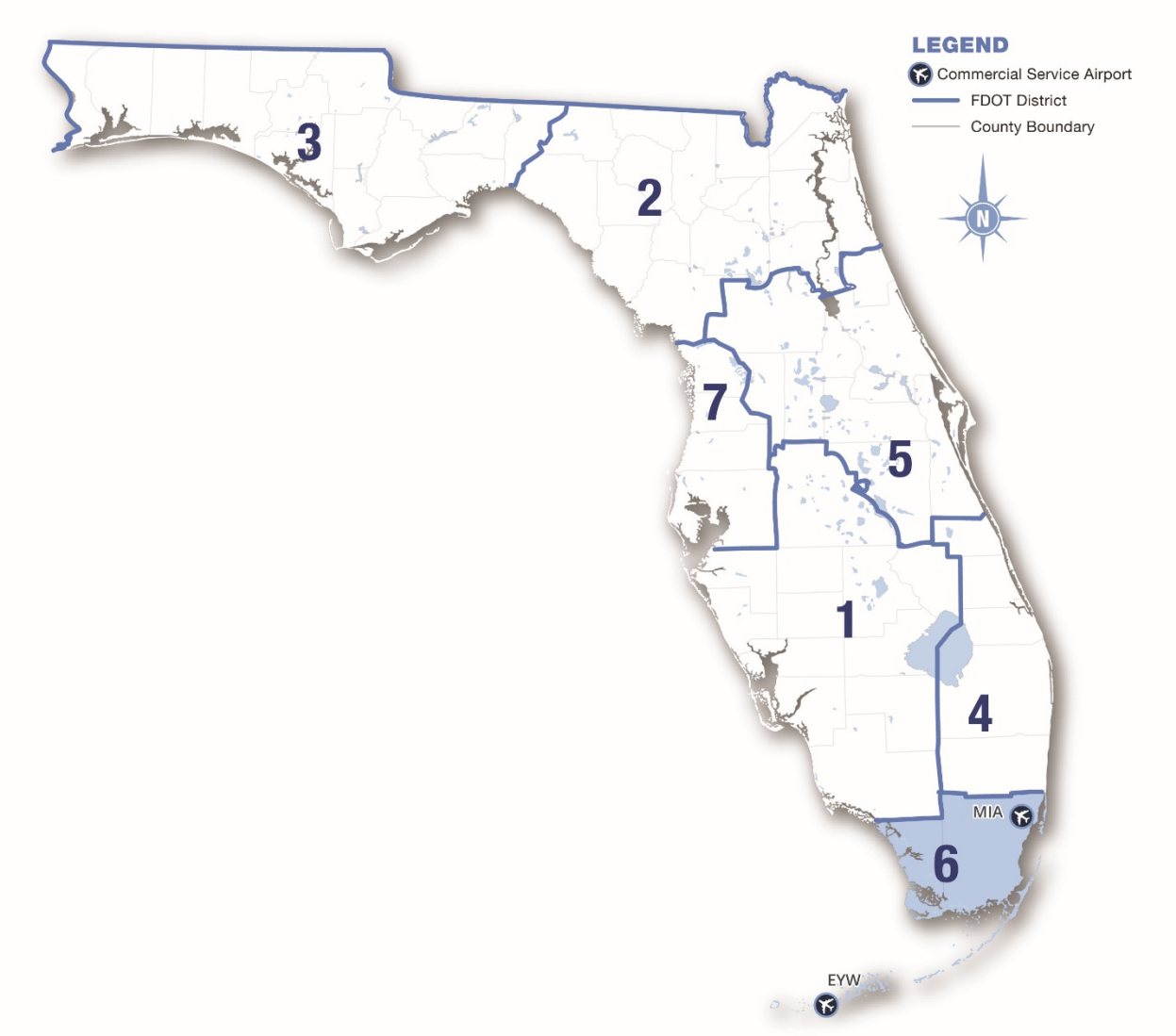


Sources: OAG Schedule Analyzer, Kimley-Horn 2021

2.4.2.6. District 6

District 6 comprises two counties in the southernmost portion of Florida, including the Florida Keys (see **Figure 2-20**).

Figure 2-20: FDOT District 6 Map



Sources: FDOT, 2020; Kimley-Horn, 2022

One of Florida's major metropolitan areas, Miami is located in District 6 and is home to a large proportion of the FDOT District's nearly 2.6 million residents. With two major tourist destinations, Miami and the Keys, there is a significant influx of both leisure and business traffic into the region. Much of this traffic flows through Miami International Airport (MIA) which is one of the busiest international airports in the U.S. Located at the southern tip of the state, MIA serves as a significant Latin American hub for American Airlines. The two commercial service airports in District 6 include:

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

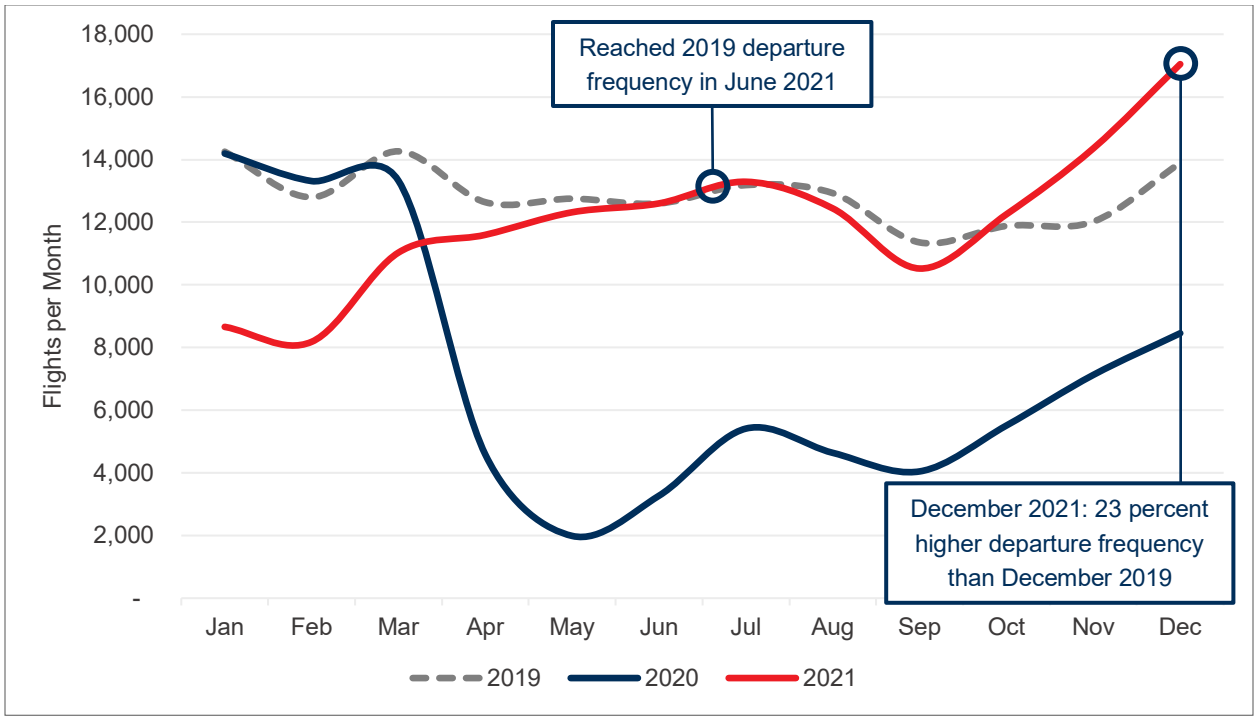
With the combination of leisure and business traffic, District 6 airports have historically had a stable level of scheduled departures throughout each year. Like other FDOT Districts, the impacts of the pandemic were first felt in April 2020. Due to the international travel restrictions imposed from the pandemic that cut MIA's Latin American traffic, District 5 recorded 84 percent lower scheduled departure frequency in May 2020—the largest YoY (2019 to 2020) percentage decline of scheduled monthly departures of any FDOT District. The resurgence in leisure traffic into District 6, combined with many Latin American and Caribbean countries lifting travel restrictions in the latter half of 2020, resulted in airlines adding flights through the remainder of 2020. This allowed the total scheduled departure volume in 2020 to be 44 percent lower than 2019, nearly half of the flights lost in May 2020. The recovery trend continued into 2021 and by June 2021, District 5 reached the same month to month level of departure frequency recorded in 2019 and began to exceed pre-pandemic activity. By December 2021, scheduled departures were 23 percent higher than December 2019, which helped contribute to District 6 airports recording a total number of scheduled departures in 2021, within seven percent of 2019 activity. The largest recovery was seen across international flights with December 2021 recording nearly 10 percent higher scheduled departures than December 2019. **Table 2-7** presents the scheduled departure frequency data recorded across District 6 airports in 2019, 2020, and 2021 and **Figure 2-21** illustrates the trend in the scheduled departure frequency among the two airports in District 6.

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

Month	2019	2020	2021	% YoY Change 2019-2021
January	14,252	14,193	8,660	-39.2%
February	12,798	13,314	8,182	-36.1%
March	14,263	13,325	11,031	-22.7%
April	12,639	4,585	11,598	-8.2%
May	12,752	1,987	12,318	-3.4%
June	12,600	3,271	12,601	0.0%
July	13,185	5,413	13,292	0.8%
August	12,928	4,639	12,441	-3.8%
September	11,356	4,046	10,522	-7.3%
October	11,881	5,512	12,254	3.1%
November	12,021	7,127	14,358	19.4%
December	13,894	8,456	17,046	22.7%
Total	**154,569**	**85,868**	**144,303**	**-6.6%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2021

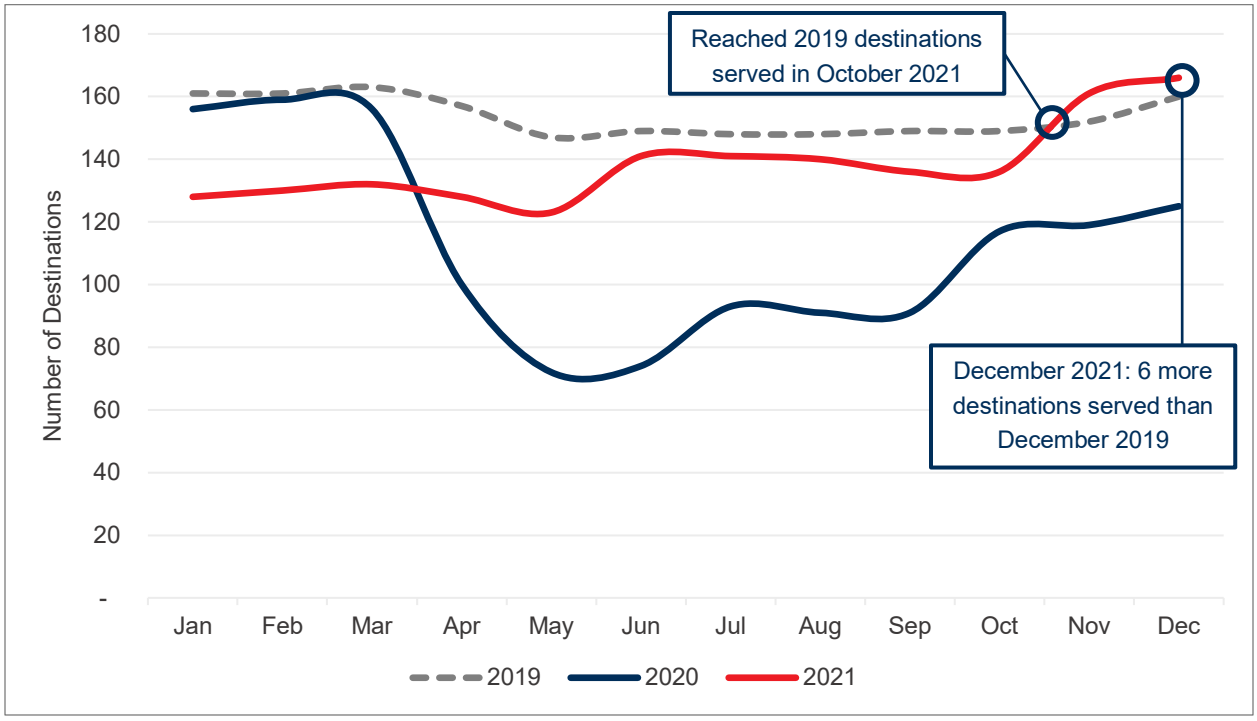
Figure 2-21: District 6 Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

District 6 airports traditionally provide service to a consistent number of destinations during all months of the year. As shown in **Figure 2-22**, during Q1 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 Q2 2020. These lost destinations were primarily international, likely due to schedule changes from MIA. District 6 has been slow to reinstate nonstop service to many destinations in the first half of 2021 due to MIA being impacted by global travel restrictions still in place for international travel. Despite this, airlines added enough destinations in District 6 throughout 2021 to reach the pre-pandemic level of nonstop service availability in October 2021 and start to reach more domestic destinations than ever. By December 2021, the two airports in District 6 served 166 interstate nonstop destinations compared with 160 in December 2019. **Figure 2-22** illustrates the trend in interstate nonstop destinations served since 2019.

Figure 2-22: District 6 Number of Nonstop Interstate and International Destinations Served

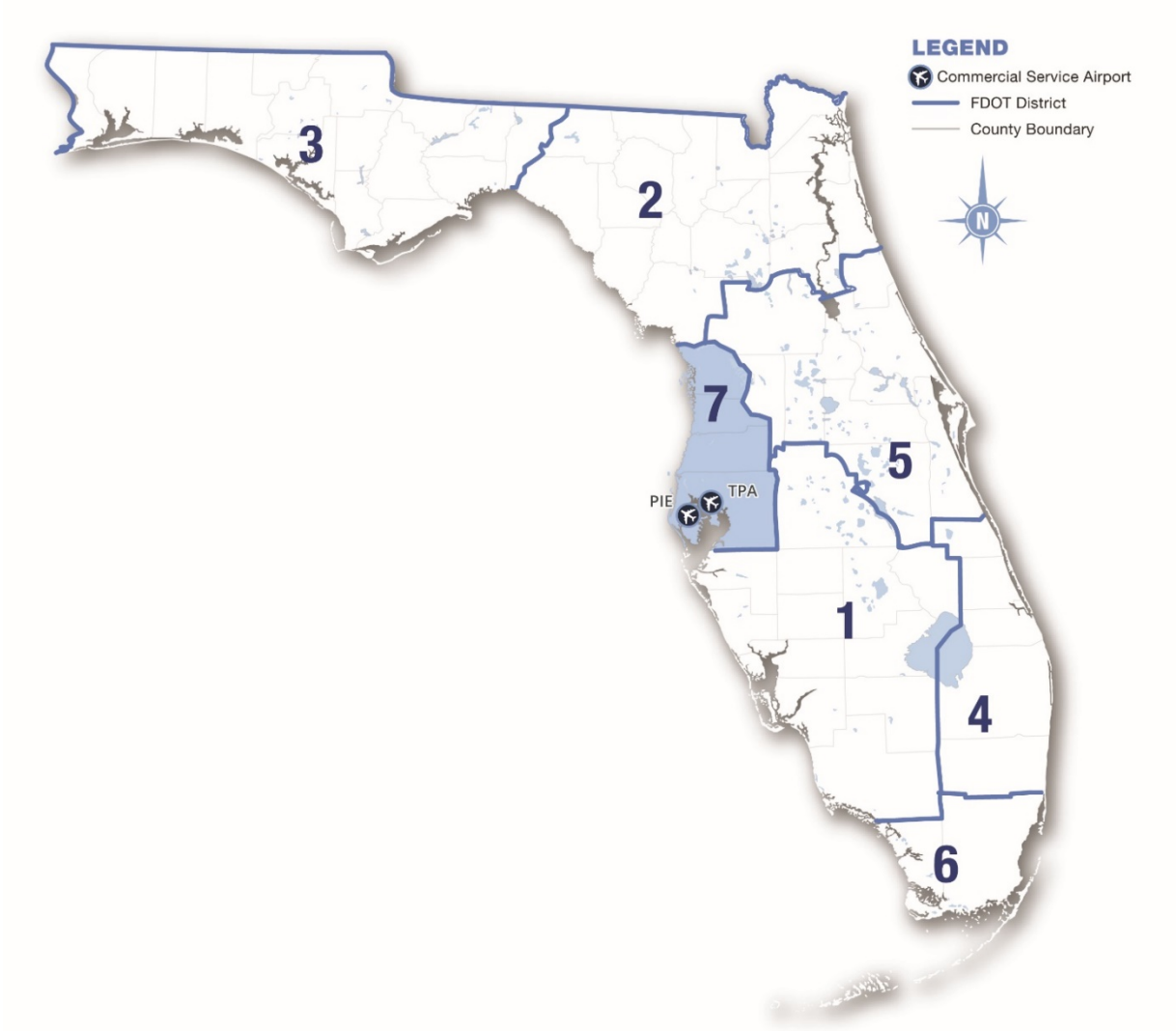


Sources: OAG Schedule Analyzer, Kimley-Horn 2021

2.4.2.7. District 7

District 7 comprises five counties in the west central Florida region, along the Gulf Coast (see **Figure 2-23**).

Figure 2-23: FDOT District 7 Map



Sources: FDOT, 2020; Kimley-Horn, 2022

The biggest population center in this region is Tampa, with Tampa International Airport (TPA) accounting for the majority of the FDOT District's airline activity. 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 in the FDOT District. The two commercial service airports in District 7 include:

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

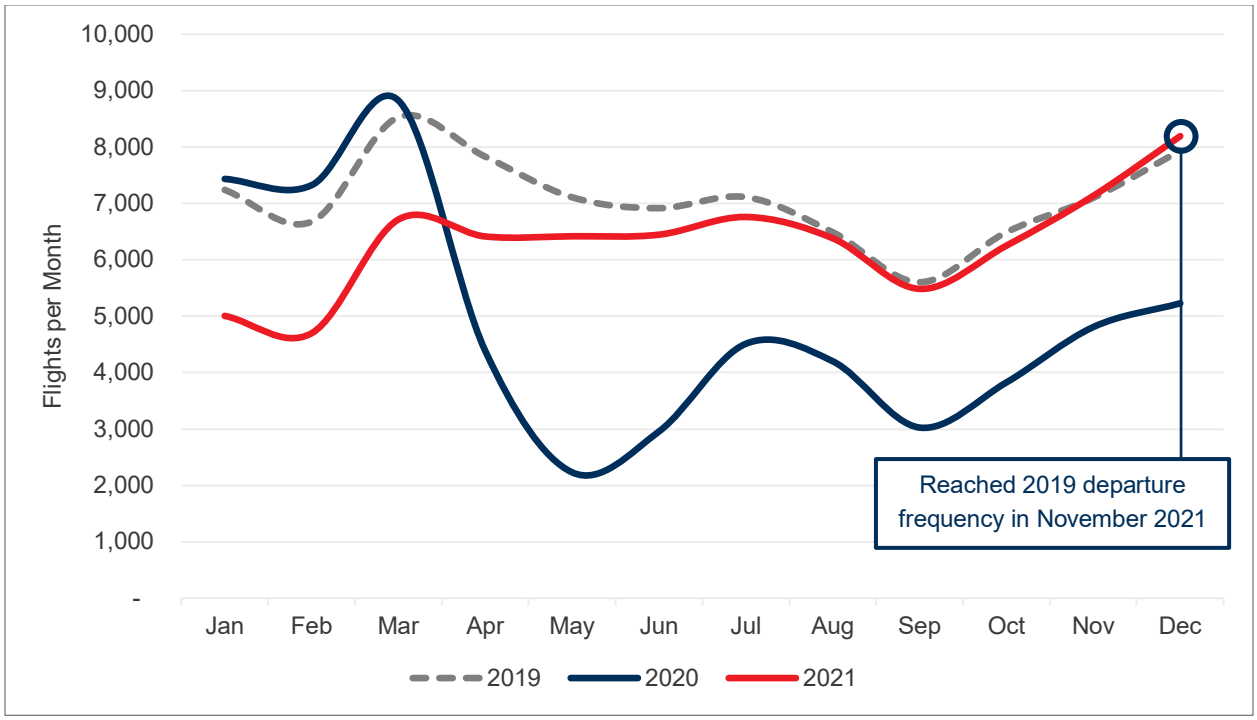
Both TPA and PIE support leisure and business travelers in the greater Tampa region. However, TPA experiences far more traffic and serves a more extensive range of domestic and international destinations. Similar to other FDOT Districts, District 7 first recorded the impacts of the pandemic starting in April 2020. By May 2020, District 7 recorded 69 percent fewer scheduled departures YoY than May 2019. While District 7 airports experienced a brief rebound starting in June 2020, with leisure traffic slowly returning, total departure frequency volume in 2020 was still 31 percent lower than 2019. The introduction of vaccines in early 2021 and a resurgence in leisure travel contributed to District 7 airports reaching 2019 activity in November 2021. However, the slow return in international traffic to TPA resulted in the airport still recording 11 percent lower total scheduled departures in 2021 compared to 2019. **Table 2-8** presents the scheduled departure frequency data recorded across District 7 airports in 2019, 2020, and 2021 and **Figure 2-24** illustrates the trend of scheduled departure frequency among the two airports in District 7.

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

Month	2019	2020	2021	% YoY Change 2019-2021
January	7,240	7,435	5,006	-30.9%
February	6,676	7,323	4,698	-29.6%
March	8,531	8,825	6,716	-21.3%
April	7,829	4,383	6,414	-18.1%
May	7,109	2,231	6,418	-9.7%
June	6,916	2,957	6,446	-6.8%
July	7,112	4,512	6,760	-4.9%
August	6,489	4,201	6,382	-1.6%
September	5,603	3,025	5,485	-2.1%
October	6,491	3,827	6,252	-3.7%
November	7,100	4,809	7,135	0.5%
December	7,935	5,229	8,193	3.3%
Total	**85,031**	**58,757**	**75,905**	**-10.7%**

Sources: OAG Schedule Analyzer, Kimley-Horn 2021

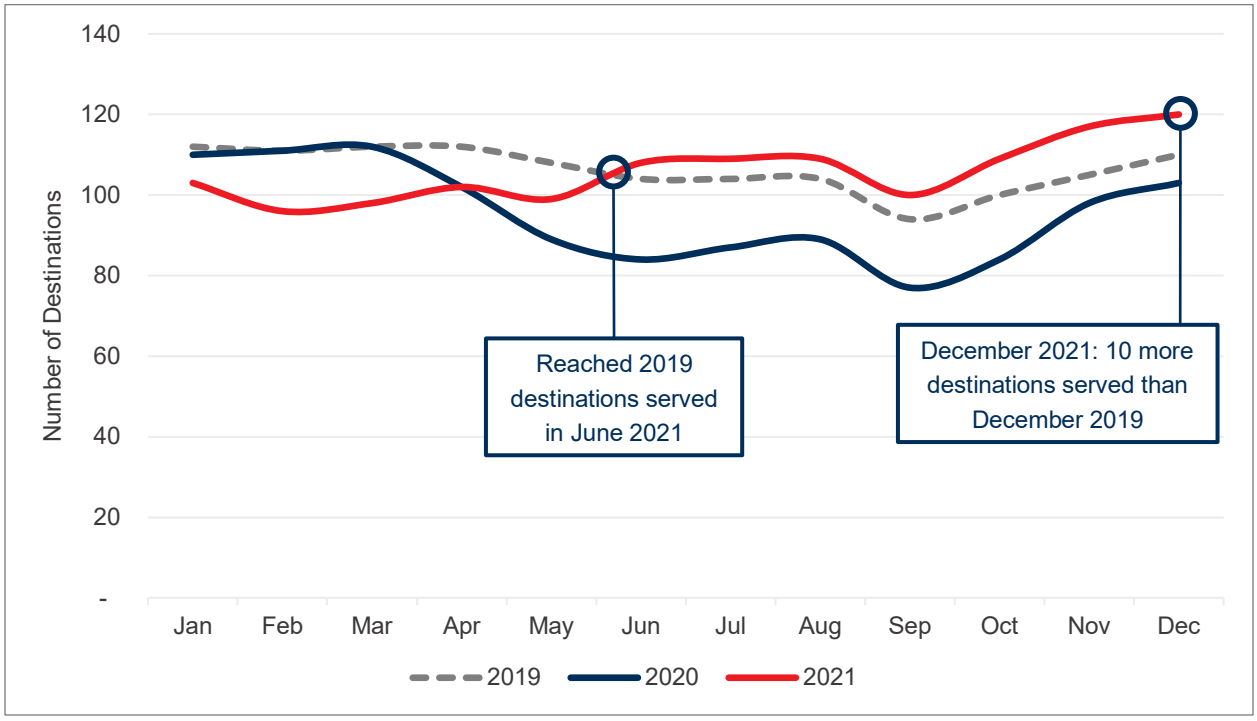
Figure 2-24: District 7 Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Given the popularity of leisure and business travel in the Tampa region, District 7 airports offer service to a relatively stable number of destinations throughout the year. The pandemic forced airlines to cut a significant number of nonstop interstate destinations and all international destinations from District 7—dropping from 112 total interstate and international destinations served in March 2020 to 77 in September 2020. However, airlines started to add back interstate and international destinations shortly after in response to the introduction of vaccines and easing of global travel restrictions. By June 2021, District 7 reached pre-pandemic nonstop service availability (both domestic and international) and added several new domestic destinations throughout the rest of 2021. **Figure 2-25** illustrates the trend in interstate nonstop destinations served since 2019.

Figure 2-25: District 7 Number of Nonstop Interstate and International Destinations Served



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

2.4.3. Airport Snapshots

The following subsections provide detailed airline schedule comparisons at each of Florida's commercial service airports. Each airport comparison evaluated the number of destinations served and departure schedule frequency between 2019, 2020, and 2021. While seating capacity was also analyzed, it closely mirrored the trends identified among schedule frequency changes and is thus not documented in the following sections.

An additional assessment was conducted for the four large hub airports in Florida considering they receive a significant share of international traffic (MCO, MIA, FLL, TPA). This assessment reviewed the trends in nonstop scheduled international flights departing from these four airports. While some non-large hub airports experience international flights, their share of international flights is not robust enough to warrant a separate analysis.

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

2.4.3.1. District 1

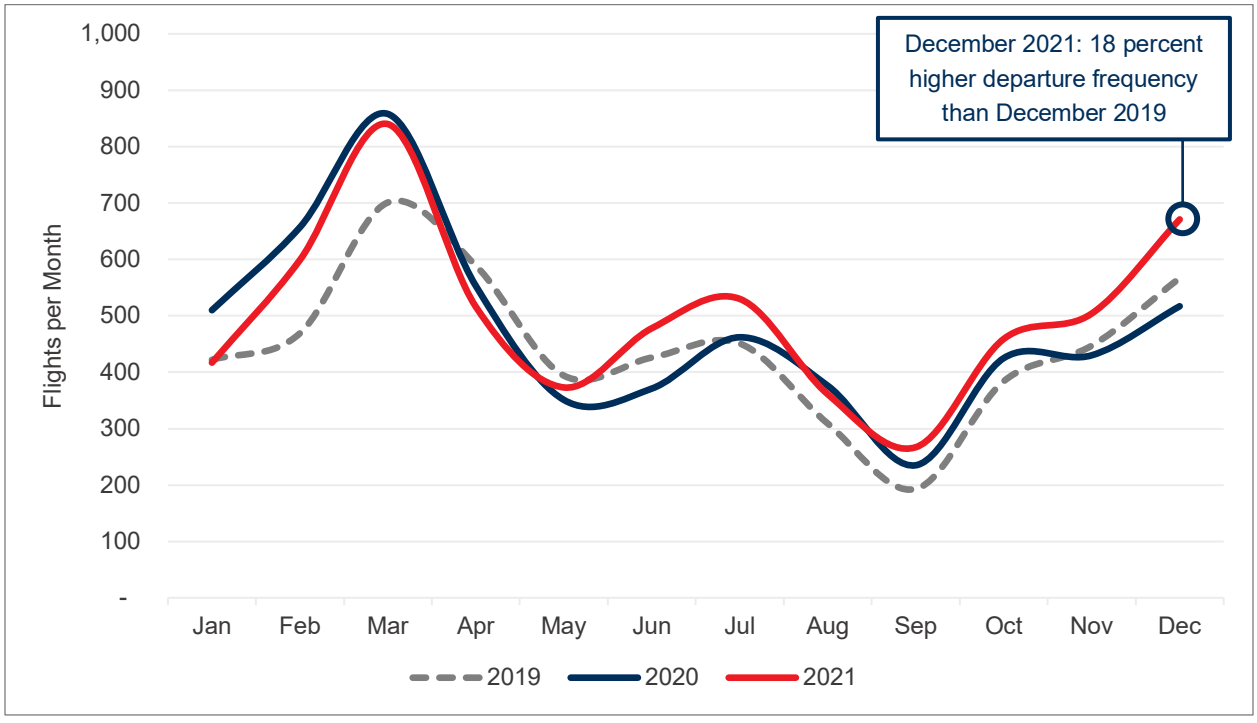
The following subsections provide airline schedule comparisons for each District 1 airport, which include Punta Gorda Airport (PGD), Sarasota/Bradenton Airport (SRQ), and Southwest Florida International Airport (RSW).

Punta Gorda Airport (PGD)

Punta Gorda Airport is located in Punta Gorda, FL between Sarasota and Fort Myers and is a popular tourist destination, with numerous beaches and barrier island resort communities. These features have attracted the leisure-focused Allegiant Airlines to provide service to more than 45 nonstop destinations from PGD. PGD's large share of leisure traffic has allowed the airport to experience little negative impact from the pandemic. **Figure 2-26** illustrates the trend of scheduled flights out of PGD in 2019, 2020, and 2021.

Punta Gorda Airport did witness a small decrease in scheduled departure volume in April and May 2020, but Allegiant Airlines quickly added back flights to the airport in June 2020 to record higher scheduled departures than the prior year. This trend continued through the remainder of 2020, with PGD recording more than seven percent higher activity in 2020 than 2019. PGD recorded even more activity in 2021, which was supported further by the introduction of vaccines in the early part of the year. In total, PGD accommodated 12 percent higher scheduled departures in 2021 compared to 2019—a strong indicator that Punta Gorda's leisure popularity helped PGD sustain a high volume of airline traffic despite the pandemic. This was also supported by new airline service by Sun Country Airlines in 2021.[vii]

Figure 2-26: PGD Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Schedule frequency from PGD's top destinations experienced mixed activity in 2020 compared to 2019, but nearly all destinations rebounded in 2021 with some city pairs witnessing record flight traffic.[2] Departures to Indianapolis International Airport (IND), Blue Grass Airport (LEX), and Cincinnati/Northern Kentucky International Airport (CVG) all witnessed lower activity in 2020 compared to 2019. However, Gerald R. Ford International Airport (GRR) ended 2020 with more scheduled departures than 2019.

Additionally, Allegiant Airlines at PGD added two additional nonstop interstate destinations to the airport in 2020 compared to 2019, signifying growth at the airport despite the pandemic. Schedules to the top PGD destinations in 2021 recovered to record levels with both CVG and GRR surpassing 2020 and 2019 activity in 2021. Additionally, PGD's peak number of interstate nonstop destinations in 2021 exceeds that of any time in 2020 and 2019—50 unique destinations compared to a maximum of 46 destinations in 2020 and 44 destinations in 2019. These findings indicate that PGD has largely achieved full recovery from the pandemic and has even exceeded previous activity. **Table 2-9** summarizes changes to departure frequency among the top destinations served by airlines at PGD.

Table 2-9: PGD Top Interstate Destinations[3]

Airport Name	FAA ID	2019 Frequency	2020 Frequency	2021 Frequency	% YoY Change 2019-2021
Cincinnati/Northern Kentucky International	CVG	371	367	425	15%
Indianapolis International	IND	282	232	235	-17%
Gerald R Ford International	GRR	194	217	225	16%
Niagara Falls International	IAG	190	190	166	-13%
Blue Grass (Lexington)	LEX	188	169	182	-3%

Sources: OAG Schedule Analyzer, Kimley-Horn 2021

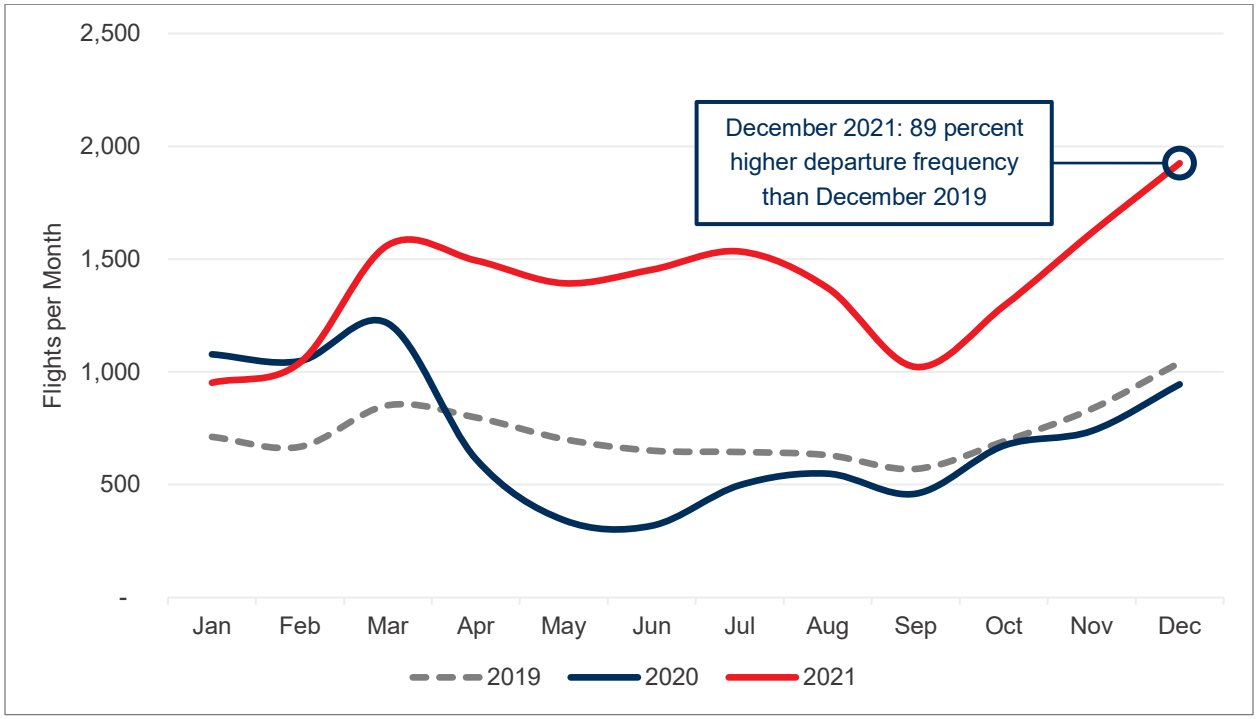
Sarasota/Bradenton International Airport (SRQ)

Sarasota/Bradenton International Airport is located on the border of Sarasota and Bradenton counties. Located near several world-renowned beaches, SRQ is a popular airport for leisure traffic especially during the winter months as tourists visit the warm climate. This allowed SRQ to recover from the pandemic within a year and go on to reach record levels of activity. **Figure 2-27** illustrates the trend of scheduled flights out of SRQ in 2019, 2020, and 2021. In the first three months of 2020, the airport experienced higher recorded operations than the same months of the previous year. The pandemic impacted SRQ starting in late Q1 2020 and by May 2020, scheduled departures were 51 percent lower

[2] Identifying the top five destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to be included in the top five but are still reflected in **Figure 2-26** for comparing the change in activity.
[3] Identifying the top five destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to be included in the top five but are still reflected in **Figure 2-26** for comparing the change in activity.

YoY than the same months in 2019. However, airlines added back flights throughout the rest of 2020 to reach 2019 activity by the end of the year into 2021. Airlines continued to add flights in 2021 to exceed 2019 activity even further and exceeded all 2019 activity. This allowed SRQ to record 89 percent higher scheduled departures throughout all of 2021 than 2019—a strong indication of complete recovery despite the pandemic. In fact, in 2021, SRQ passenger enplanements set a new all-time calendar year record with 3,163,543 enplanements—57 percent higher than 2019.[viii] This is indicative of a significant rebound from the pandemic that can be attributed to the rollout of multiple COVID-19 vaccine options and the tourism that the Sarasota area attracts.

Figure 2-27: SRQ Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

With the large rebound in leisure travel, the top destinations from SRQ rebounded significantly in 2020 and 2021.[4] All four of SRQ's top destinations exceeded 2020 and 2019 activity, indicating that SRQ has recovered from the pandemic. This includes Atlanta Hartsfield-Jackson International Airport (ATL), Charlotte/Douglas International (CLT), Chicago O'Hare International Airport (ORD), and Newark Liberty International (EWR) all recording double digit increases compared to 2019. Additionally, the peak number of interstate nonstop destinations from SRQ in 2021 exceeds that of any time in 2020 and 2019, with 41 unique destinations compared to a maximum of 38 in 2020 and 2019. **Table 2-10** summarizes changes to departure frequency among the top destinations served by airlines at SRQ.

[4] Identifying the top five destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to be included in the top five but are still reflected in **Figure 2-27** for comparing the change in activity.

Table 2-10: SRQ Top Interstate Destinations[5]

Airport Name	FAA ID	2019 Frequency	2020 Frequency	2021 Frequency	% YoY Change 2019-2021
Hartsfield-Jackson Atlanta International	ATL	2,326	1,609	2,595	12%
Charlotte/Douglas International	CLT	1,425	1,345	1,652	16%
Chicago O'Hare International	ORD	686	753	1,140	66%
Newark Liberty International	EWR	659	493	896	36%
John F Kennedy International	JFK	391	210	364	-7%

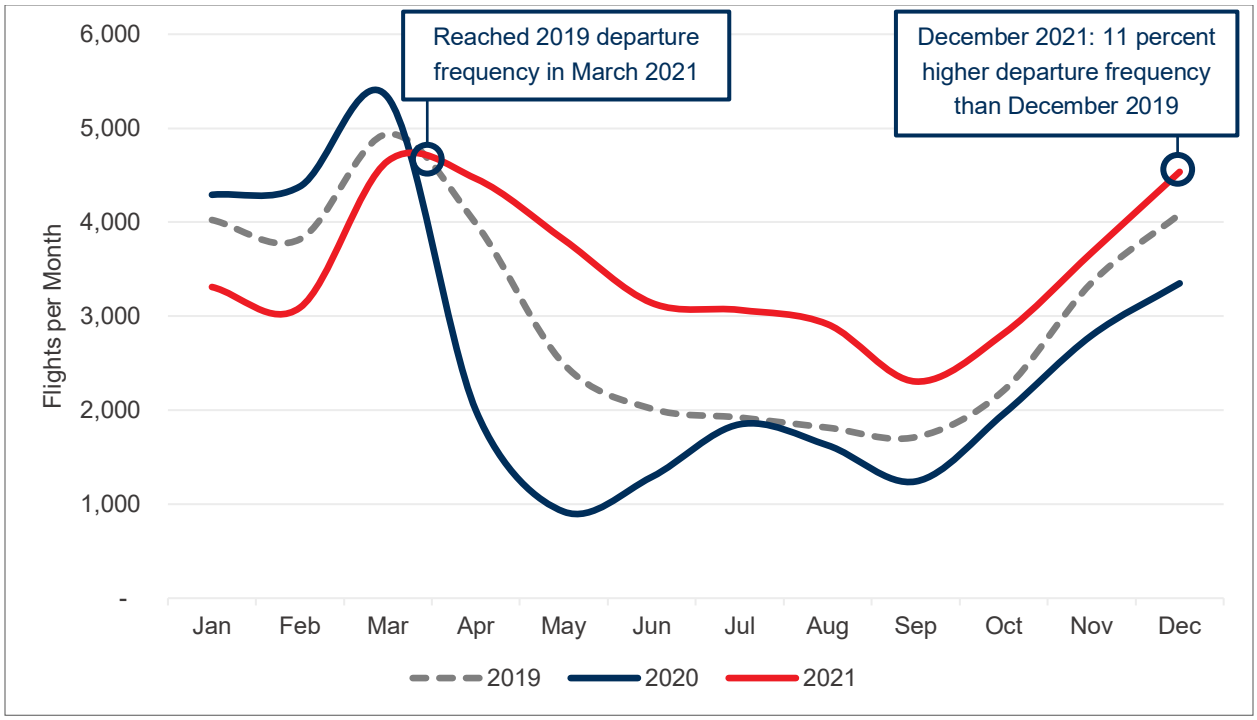
Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Southwest Florida International Airport (RSW)

Southwest Florida International Airport is located a few miles south of Fort Myers and is the main commercial service airport serving Fort Myers and Naples. RSW supports a large number of leisure travelers in the surrounding area and, as a result, is one of the top 50 airports in the U.S. in terms of passenger traffic.[ix] The large share of leisure traffic allowed RSW to recover from the pandemic within a year and exceed pre-pandemic activity as early as March 2021. **Figure 2-28** illustrates the trend of scheduled flights out of RSW in 2019, 2020, and 2021. The impacts of the pandemic were first recorded in late Q1 2020, and by May 2020, scheduled departures were over 63 percent lower YoY than May 2019. However, the following months saw some recovery to pre-pandemic activity. RSW continued to lag just short of 2019 activity until March-April 2021 when the airport reached 2019 departure frequency. Airlines maintained a high level of flight traffic through the remainder of 2021 to be significantly above 2019 activity. This allowed RSW to record 15 percent higher scheduled annual departures in 2021 than 2019. Additionally, RSW recorded a record 1,085,569 passengers in December 2021 which is a new monthly high for RSW, a strong indication of full recovery and new activity for the airport.[x]

[5] Ibid.

Figure 2-28: RSW Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Airlines primarily connect RSW to several major hubs in the U.S. Similar to SRQ and PGD, airlines serving RSW cut capacity across the airport's top destinations in 2020.[6] However, the recovery in flights were mixed across the top destinations. General Edward Lawrence Logan International (BOS) experienced a 27 percent decrease in 2020 frequency relative to 2019, but only recovered about 10 percent of the lost flights in 2021. Alternatively, ATL and EWR added back flights in 2021 to come within three percent of pre-pandemic activity. The more favorable signs of recovery were seen with ORD and Detroit Metropolitan Wayne County Airport (DTW) which witnessed record levels of route traffic in 2021. The number of interstate nonstop destinations served from RSW was consistent throughout 2019 – 2021 with between 53 and 54 unique destinations served. **Table 2-11** summarizes changes to departure frequency among the top destinations served by airlines at RSW.

[6] Identifying the top five destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to be included in the top five but are still reflected in **Figure 2-28** for comparing the change in activity.

Table 2-11: RSW Top Interstate Destinations[7]

Airport Name	FAA ID	2019 Frequency	2020 Frequency	2021 Frequency	% YoY Change 2019-2021
Hartsfield-Jackson Atlanta International	ATL	3,578	2,900	3,541	-1%
Chicago O'Hare International	ORD	2,638	2,143	3,321	26%
General Edward Lawrence Logan International	BOS	2,207	1,603	1,761	-20%
Newark Liberty International	EWR	2,165	1,704	2,100	-3%
Detroit Metropolitan Wayne County	DTW	2,109	1,677	2,563	22%

Sources: OAG Schedule Analyzer, Kimley-Horn 2021

2.4.3.2. District 2

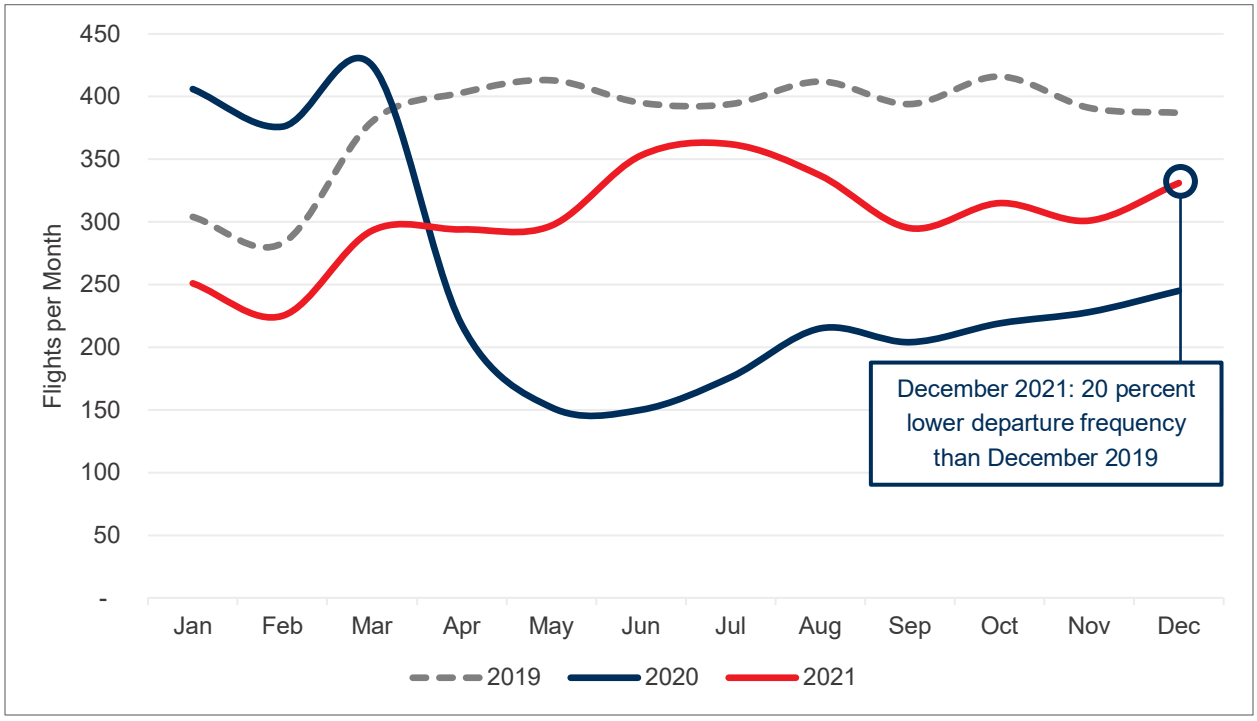
The following subsections provide airline schedule comparisons for each District 2 airport: Gainesville Regional Airport (GNV) and Jacksonville International Airport (JAX).

Gainesville Regional Airport (GNV)

Gainesville Regional Airport is located in north-central Florida and is the primary commercial service airport for the Gainesville area. Gainesville is home to the University of Florida, one of the state's largest universities, which serves more than 11,000 out-of-state students.[xi] Unlike other commercial service airports in the state, there is little tourism activity in the area to support leisure airline traffic. As such, GNV has been slow to recover from the pandemic. **Figure 2-29** illustrates the trend of scheduled flights out of GNV in 2019, 2020, and 2021. Similar to other airports, the pandemic's impacts were first recorded at GNV in late Q1 2020 with airlines significantly cutting activity. By May 2020, GNV was recording 63 percent lower scheduled departures YoY than May 2019. Airlines slowly started to add back flights to GNV throughout the remainder of 2020 for the airport to recover 29 percent of the lost flights lost throughout the year. Airlines continued to add additional flights to GNV's schedule in 2021, but the airport still ended the year with 20 percent lower scheduled annual departures than 2019—an indication that GNV is still in the process of recovering from the pandemic.

[7] Identifying the top five destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to be included in the top five but are still reflected in **Figure 2-28** for comparing the change in activity.

Figure 2-29: GNV Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Gainesville Regional Airport primarily offers service to three large airline hubs in the U.S. 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, GNV witnessed a lower frequency of departures to all destinations in 2020 compared to 2019. Additionally, two of the three top destinations from GNV (ATL and CLT) still ended 2021 with less scheduled departures than 2019. However, Dallas-Fort Worth International Airport (DFW) exceeded the volume of scheduled departures in 2019 in 2021 with 794 departures compared to 571 in 2019. **Table 2-12** summarizes changes to departure frequency among the top destinations served by airlines at GNV.

Table 2-12: GNV Top Interstate Destinations

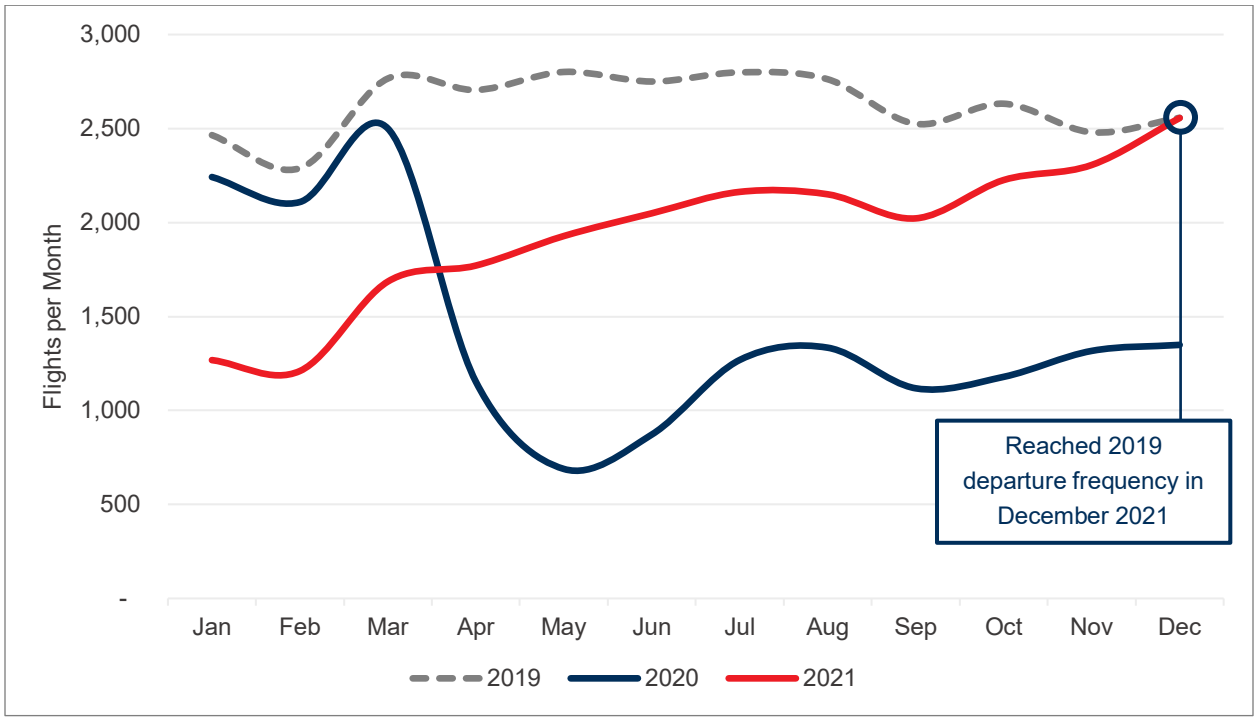
Airport Name	FAA ID	2019 Frequency	2020 Frequency	2021 Frequency	% YoY Change 2019-2021
Hartsfield-Jackson Atlanta International	ATL	2,563	1,524	1,541	-40%
Charlotte/Douglas International	CLT	1,435	1,018	1,317	-8%
Dallas-Fort Worth International	DFW	571	469	794	39%

Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Jacksonville International Airport (JAX)

Jacksonville International Airport serves as the primary commercial service airport for the city of Jacksonville, one of Florida's largest metropolitan areas. JAX welcomes a mix of leisure, business, and military users meaning the airport has diverse airline activity and the number of destinations, frequency of departures, and number of available seats generally remains consistent throughout the year. The impact of the pandemic to JAX was significant, but the leisure demand into JAX supported the airport in recovering in terms of scheduled departures by the end of 2021. **Figure 2-30** illustrates the trend of scheduled flights out of JAX in 2019, 2020, and 2021. Similar to other airports, the pandemic's impacts were first recorded in late Q1 2020 and by May 2020, scheduled departures from JAX were down 75 percent YoY compared to the same month in 2019. Airlines started to add flights into JAX in the summer months to accommodate leisure traffic, but this growth quickly leveled out in the latter half of 2020. The summer recovery helped JAX close the gap to record 47 percent lower scheduled departures YoY in December 2020 than December 2019. In 2021, airlines started to add additional activity into JAX to allow the airport to reach pre-pandemic activity by December 2021—a nearly two year recovery period. This relatively slow recovery compared with other Florida commercial service airports may be tied with business traffic that JAX historically supports lagging behind leisure activity.

Figure 2-30: JAX Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Before the onset of the pandemic, JAX was served by seven airlines that offered up to 30 unique destinations. This air service network decreased significantly as a result of the pandemic, with JAX providing service to 27 unique nonstop destinations cumulatively through 2020. However, the number of nonstop interstate destinations rebounded in 2021 to offer up to 31 unique destinations in June and July 2021. Data revealed the top five destinations served from JAX are large airline hub airports, all of which

experienced declines in schedule frequency in 2020 relative to 2019.[8] This decline ranges from 28 percent (CLT) to a 74 percent decline to Ronald Reagan Washington National Airport (DCA). Scheduled departure performance in 2021 among the top destinations were still well short of 2019 activity but did show improvement compared to 2020. The largest recovery was seen with the DCA route, which increased in scheduled departures by 128 percent in 2021 compared to 2020. It should be noted that some airlines did switch to using larger narrow-body aircraft instead of smaller regional jets across some domestic routes. This may have resulted in a lower scheduled departure frequency being recorded across some airports, but a similar or even higher volume of passenger traffic. **Table 2-13** summarizes changes to departure frequency among the top destinations served by airlines at JAX.

Table 2-13: JAX Top Interstate Destinations[9]

Airport Name	FAA ID	2019 Frequency	2020 Frequency	2021 Frequency	% YoY Change 2019-2021
Hartsfield-Jackson Atlanta International	ATL	5,218	3,360	3,776	-28%
Charlotte/Douglas International	CLT	2,823	2,019	2,378	-16%
Chicago O'Hare International	ORD	2,260	1,067	1,520	-33%
John F Kennedy International	JFK	2,139	848	1,549	-28%
Ronald Reagan Washington National	DCA	1,920	495	1,129	-41%

Sources: OAG Schedule Analyzer, Kimley-Horn 2021

2.4.3.3. District 3

The following subsections provide airline schedule comparisons for each District 3 airport, which include Destin-Fort Walton Beach Airport (VPS), Northwest Florida Beaches International Airport (ECP), Pensacola International Airport (PNS), and Tallahassee International Airport (TLH).

Destin–Fort Walton Beach Airport (VPS)

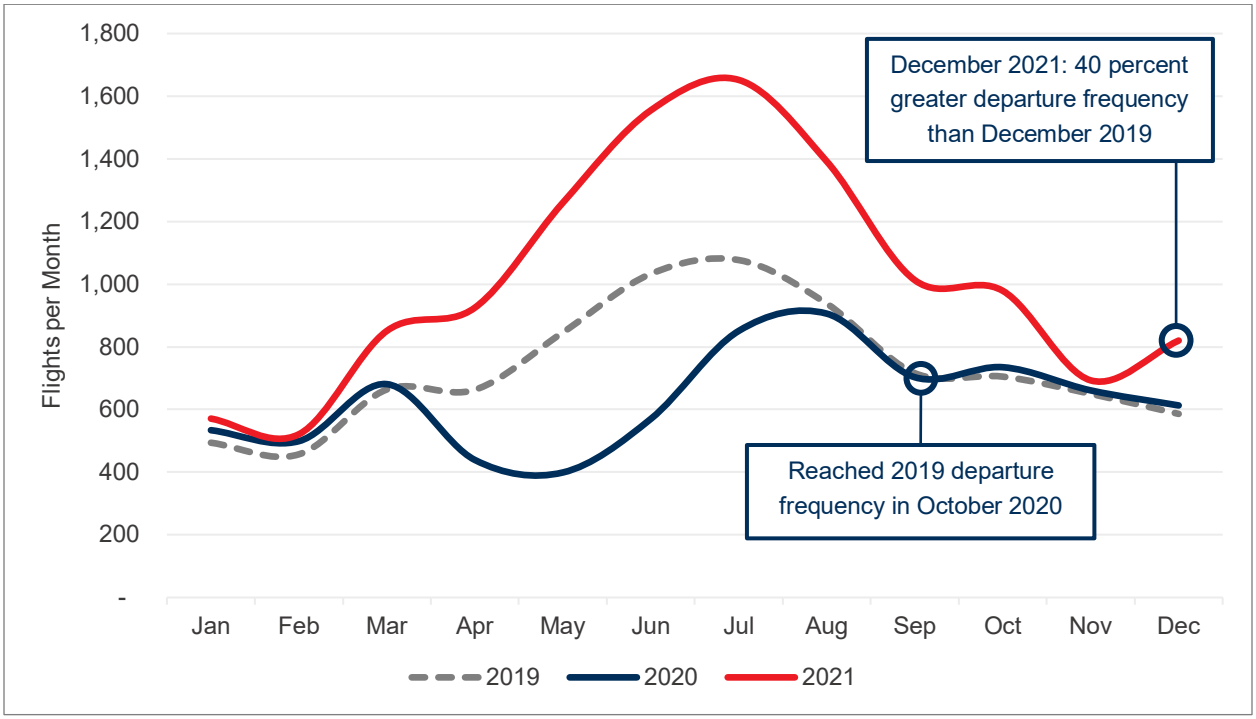
Destin–Fort Walton Beach Airport is located in the Destin-Fort Walton area, which is a popular leisure destination in the Florida Panhandle situated on the Gulf coast between Pensacola and Panama City. The airport serves as a gateway for leisure traffic, bringing in most of the passenger activity in the summer months. This heavy leisure traffic has allowed VPS to recover quickly from the pandemic and add record volumes of flights to the airport. **Figure 2-31** illustrates the trend of scheduled flights out of VPS in 2019, 2020, and 2021. Similar to other airports, the impacts of the pandemic to VPS were first

[8] Identifying the top five destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to be included in the top five but are still reflected in **Figure 2-30** for comparing the change in activity.

[9] Identifying the top five destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to be included in the top five but are still reflected in **Figure 2-30** for comparing the change in activity.

recorded in late Q1 2020. By May 2020, scheduled departures from VPS were down 53 percent YoY compared to the same month in the prior year. However, airlines quickly started to add back flights to VPS to accommodate summer leisure demand. By September/October 2020, scheduled departures had reached pre-pandemic activity and closely followed 2019 activity for the remainder of 2020. In 2021, airlines added a significant volume of flights to VPS. This was especially prevalent between May and August 2021 with VPS consistently recording over 45 percent higher scheduled departures YoY than the same timeframe in 2019—a strong indication of a big resurgence in summer leisure traffic back into the Panhandle. This allowed VPS to record 12,232 annual scheduled departures in 2021, 39 percent higher than in 2019.

Figure 2-31: VPS Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

With the decline in schedule frequency in Q2 and Q3 2020, most of the top destinations for VPS reported a negative YoY percentage change in total scheduled departure frequency for 2020.[10] However, the large resurgence in summer leisure traffic into the Panhandle in 2021 led to nearly all the top destinations exceeding 2019 activity. Additionally, the total number of interstate nonstop destinations from VPS reached a new record between June and August 2021, with 50 unique destinations compared to a peak of 40 destinations in 2020 and 36 in 2019. **Table 2-14** summarizes changes to departure frequency among the top destinations served by airlines at VPS.

[10] Identifying the top five destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to be included in the top five but are still reflected in **Table 2-14** for comparing the change in activity.

Table 2-14: VPS Top Interstate Destinations[11]

Airport Name	FAA ID	2019 Frequency	2020 Frequency	2021 Frequency	% YoY Change 2019-2021
Hartsfield-Jackson Atlanta International	ATL	2,353	1,783	2,271	-3%
Dallas-Fort Worth International	DFW	1,651	1,363	1,891	15%
Charlotte/Douglas International	CLT	1,463	1,457	1,788	22%
George Bush Intercontinental/ Houston	IAH	939	618	1,020	9%
Ronald Reagan Washington National	DCA	394	248	501	27%

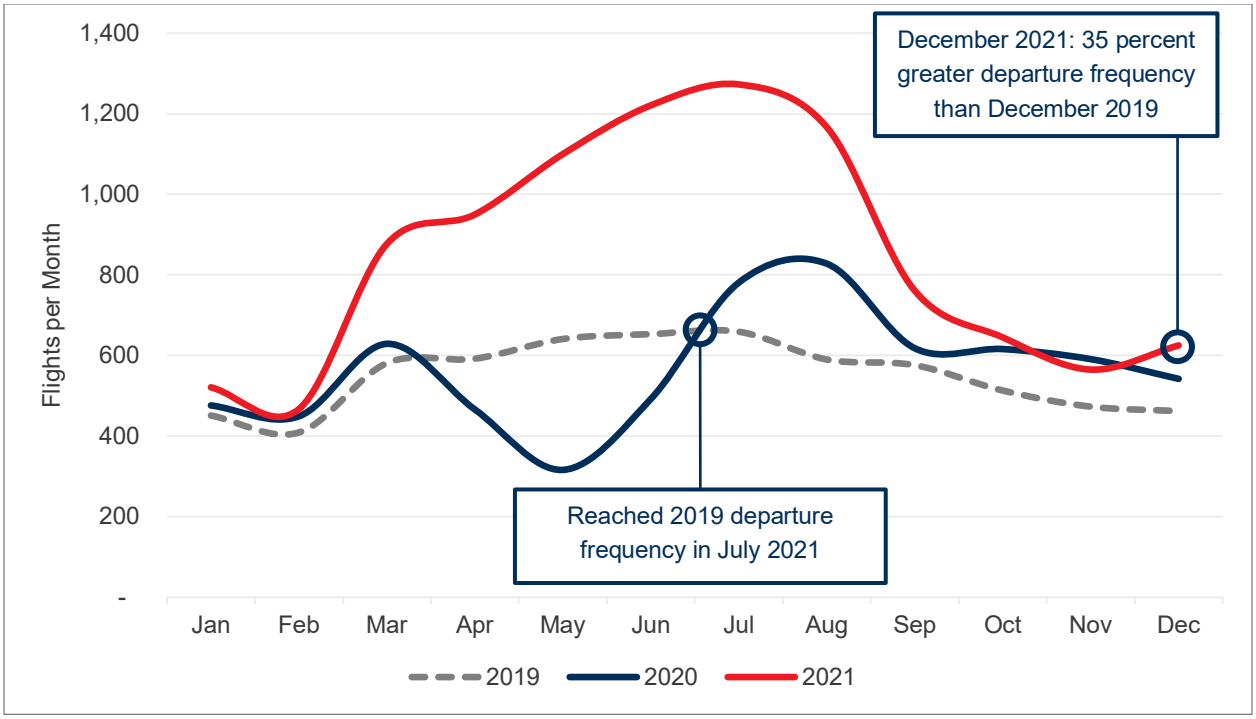
Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Northwest Florida Beaches International Airport (ECP)

Northwest Florida Beaches International Airport is in the Florida Panhandle and located 16 miles northeast of Panama City. Nearby Panama City Beach is one of the most popular beaches along the Gulf coast and attracts a significant amount of tourist traffic to the region. As a result, ECP traditionally receives more airline traffic during spring break and the summer months. This allowed ECP to recover much quicker from the pandemic than most airports and go on to achieve record levels of activity. **Figure 2-32** illustrates the trend of scheduled flights out of ECP in 2019, 2020, and 2021. ECP first recorded a decline in scheduled departures in late Q1 2020 and reached the lowest activity level in May 2020 (51 percent decline YoY compared to the same month in the prior year). However, airlines quickly added back flights in the subsequent months to reach 2019 activity between June and July 2020—less than two months to achieve full recovery. Airlines continued to add flights to ECP in 2020, but the largest spike in flight schedule activity occurred in early to mid 2021. Similar to VPS, airlines added a significant number of flights to ECP to accommodate a large resurgence in summer leisure demand into the Panhandle. By July 2021, ECP recorded over 93 percent higher scheduled departures YoY compared to May 2019—a strong indication of summer leisure demand making an unprecedented comeback to the Panhandle. This significant spike in traffic resulted in ECP being recognized as one of the highest growing U.S. airports in 2021 according to Simple Flying.[xii]

[11] Ibid.

Figure 2-32: ECP Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

The scheduled airline departures to top interstate destinations from ECP varied in 2020 and 2021 relative to 2019.[12] Departure frequency to ATL declined in 2020 but recovered immensely in 2021 to be 26 percent higher than 2019. This similar trend occurred with George Bush Intercontinental/Houston Airport (IAH), DFW, and CLT. Additionally, the total number of nonstop interstate destinations available from ECP increased to a peak of 19 destinations in 2021, compared to 15 in 2020 and 14 in 2019. However, Nashville International (BNA) recorded the highest scheduled departures in 2020 but declined in 2021. **Table 2-15** summarizes changes to departure frequency among the top destinations served by airlines at ECP.

Table 2-15: ECP Top Interstate Destinations[13]

Airport Name	FAA ID	2019 Frequency	2020 Frequency	2021 Frequency	% YoY Change 2019-2021
Hartsfield-Jackson Atlanta International	ATL	2,065	1,690	2,600	26%
Nashville International	BNA	811	1,050	916	13%
George Bush Intercontinental/ Houston	IAH	784	686	1,048	34%

[12] Identifying the top five destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to be included in the top five but are still reflected in **Figure 2-15** for comparing the change in activity.
[13] Ibid.

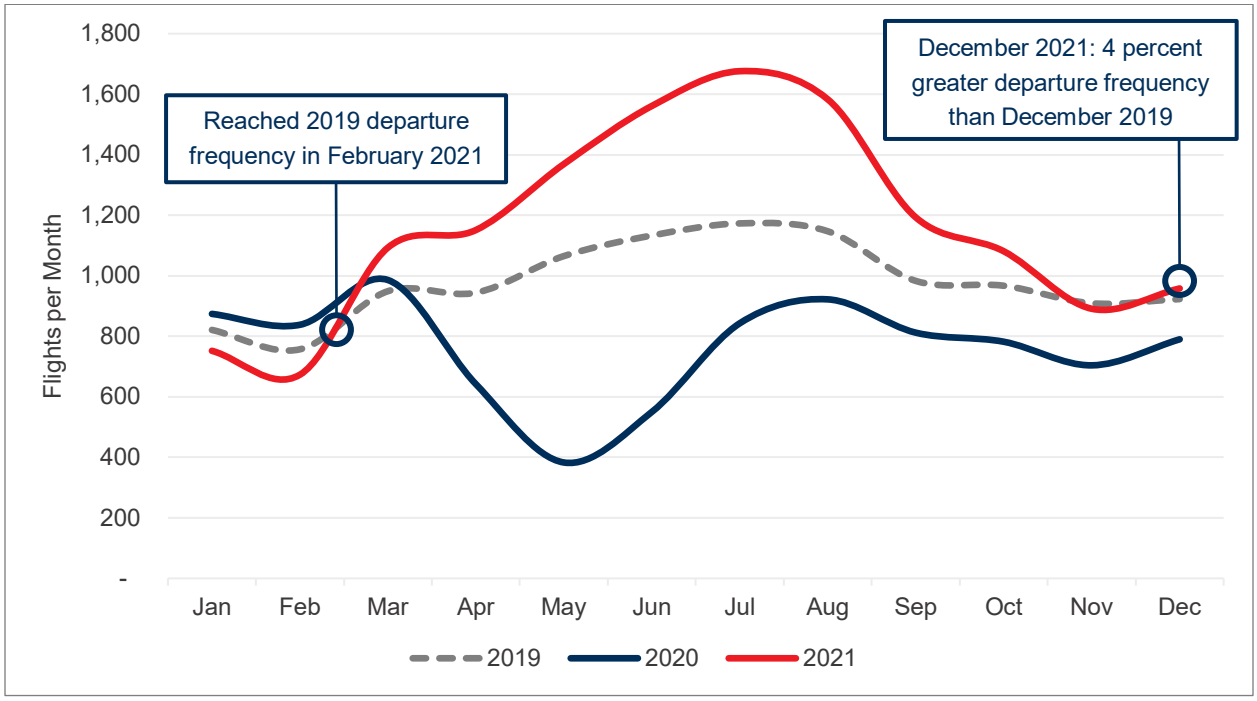
Airport Name	FAA ID	2019 Frequency	2020 Frequency	2021 Frequency	% YoY Change 2019-2021
Dallas-Fort Worth International	DFW	754	765	977	30%
Charlotte/Douglas International	CLT	744	814	1,082	45%

Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Pensacola International Airport (PNS)

Pensacola International Airport serves as the primary commercial service airport for Pensacola in the Florida Panhandle. Similar to neighboring Destin-Fort Walton and Panama City Beach, Pensacola supports a combination of commercial service, general aviation, and military traffic. Most of the commercial service traffic is leisure travelers using PNS to access the surrounding area during the summer months, as tourists flock to the region to enjoy dozens of beaches and golf courses. As such, PNS supports considerable leisure traffic and offers year-round nonstop service to more than 15 airports nationwide. This allowed PNS to recover from the pandemic within a year. **Figure 2-33** illustrates the trend of scheduled flights out of PNS in 2019, 2020, and 2021. The pandemic's impact was first recorded at PNS in late Q1 2020, and by May, scheduled departures were 64 percent lower YoY than May 2019. However, airlines quickly added back flights in the following months to close the gap to 17 percent by September 2020. This resulted in PNS recording 23 percent lower scheduled departures in 2020 than 2019. In 2021, airlines added a significant number of scheduled departures to accommodate a large resurgence in leisure traffic. This resulted in PNS reaching 2019 activity in February 2021 and achieving record levels of activity in subsequent months. By the end of 2021, PNS recorded 19 percent higher scheduled departures than 2019—a strong indication of traffic returning back to the Panhandle.

Figure 2-33: PNS Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

All five of the top destinations at PNS were impacted by the pandemic in 2020 with relatively low scheduled departures when compared to 2019.[14] This changed in 2021 with airlines adding back flights to reach a net increase in flights compared to 2020, and even some destinations exceeding 2019 activity (DFW and CLT). Additionally, the number of interstate nonstop destinations served from PNS reached a new peak between June and September 2021 with 26 unique destinations, compared to a maximum of 14 destinations served in 2020 and 16 in 2019. This can be attributed to a strong resurgence in leisure traffic seeking the area's beaches and the introduction of Spirit Airlines adding three new domestic nonstop destinations to PNS.[xiii] **Table 2-16** summarizes changes to departure frequency among the top destinations served by airlines at PNS.

Table 2-16: PNS Top Interstate Destinations[15]

Airport Name	FAA ID	2019 Frequency	2020 Frequency	2021 Frequency	% YoY Change 2019-2021
Hartsfield-Jackson Atlanta International	ATL	2,803	2,026	2,754	-2%
George Bush Intercontinental/Houston	IAH	1,759	1,110	1,600	-9%
Dallas-Fort Worth International	DFW	1,750	1,541	1,869	7%
Charlotte/Douglas International	CLT	1,728	1,468	1,807	5%
Ronald Reagan Washington National	DCA	754	453	620	-18%

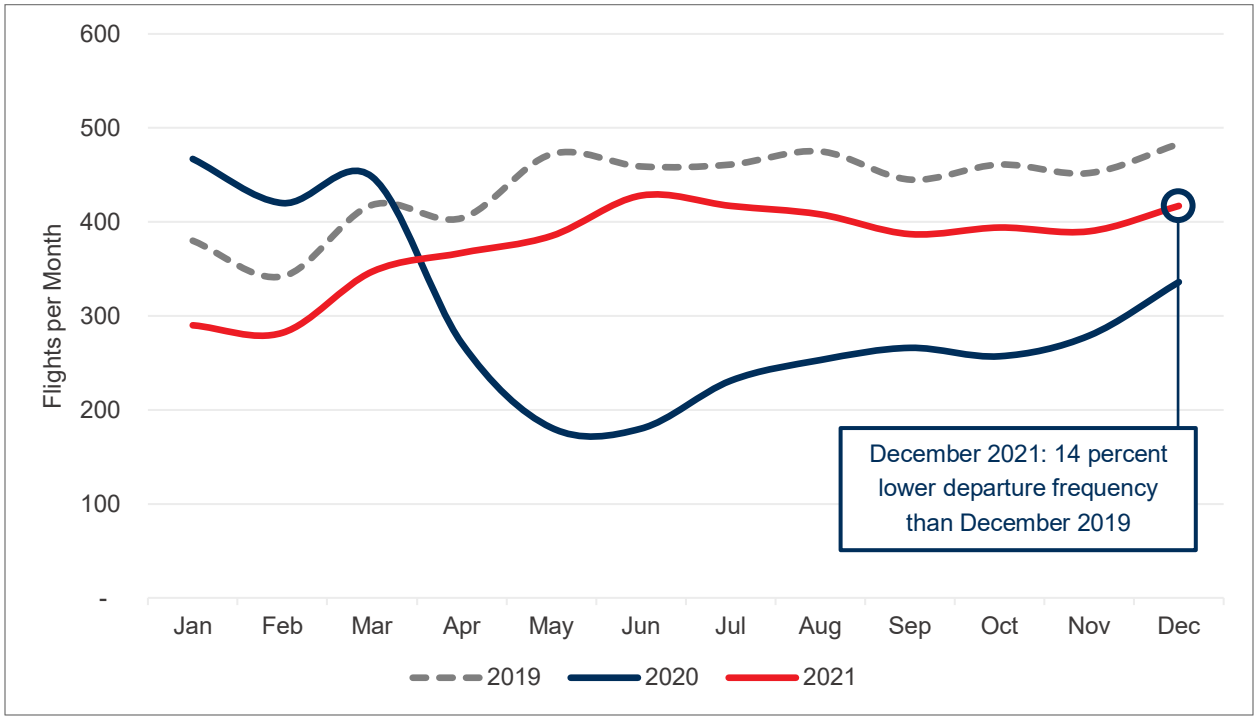
Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Tallahassee International Airport (TLH)

Tallahassee International Airport is located in the middle of the Florida Panhandle and serves the greater Tallahassee region. With Tallahassee being the capital of Florida, TLH welcomes considerable business and government traffic. As business traffic was slower to return after the onset of the pandemic than leisure traffic, TLH has been slower than some leisure-focused airports in recovering from the pandemic. **Figure 2-34** illustrates the trend of scheduled flights out of TLH in 2019, 2020, and 2021. TLH first recorded the impacts of the pandemic in late Q1 2020 and by May 2020, scheduled departures were 62 percent lower YoY than May 2019. Since then, airlines have been slow to reinstate flights and continued to remain below 2019 activity in 2020 and 2021. TLH ended 2021 with 14 percent lower scheduled departures YoY compared to 2019—a strong indication that business traffic is lagging significantly behind leisure traffic. It should be noted that some airlines have changed aircraft flying to and from TLH from smaller regional jets to larger narrow-body aircraft. This resulted in airlines subsequently cutting flight frequency at the airport and could also be a contributing factor to the drop in scheduled departures recorded at TLH.

[14] Identifying the top five destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to be included in the top five but are still reflected in **Figure 2-33** for comparing the change in activity.
[15] Ibid.

Figure 2-34: TLH Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

The top four available destinations from TLH, all of which are large hub airports, experienced negative scheduled departure changes in 2020.[16] There was some recovery observed in 2021 in scheduled departures among the destinations, but most still fell short of 2019 activity. **Table 2-17** summarizes changes to departure frequency among the top destinations served by airlines at TLH.

Table 2-17: TLH Top Interstate Destinations[17]

Airport Name	FAA ID	2019 Frequency	2020 Frequency	2021 Frequency	% YoY Change 2019-2021
Hartsfield-Jackson Atlanta International	ATL	2,493	1,586	1,694	-58%
Charlotte/Douglas International	CLT	1,454	1,012	1,294	-41%
Dallas-Fort Worth International	DFW	940	772	984	-32%
Ronald Reagan Washington National	DCA	365	177	268	-60%

Sources: OAG Schedule Analyzer, Kimley-Horn 2021

[16] Identifying the top five destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to be included in the top five but are still reflected in **Figure 2-34** for comparing the change in activity.
[17] Ibid.

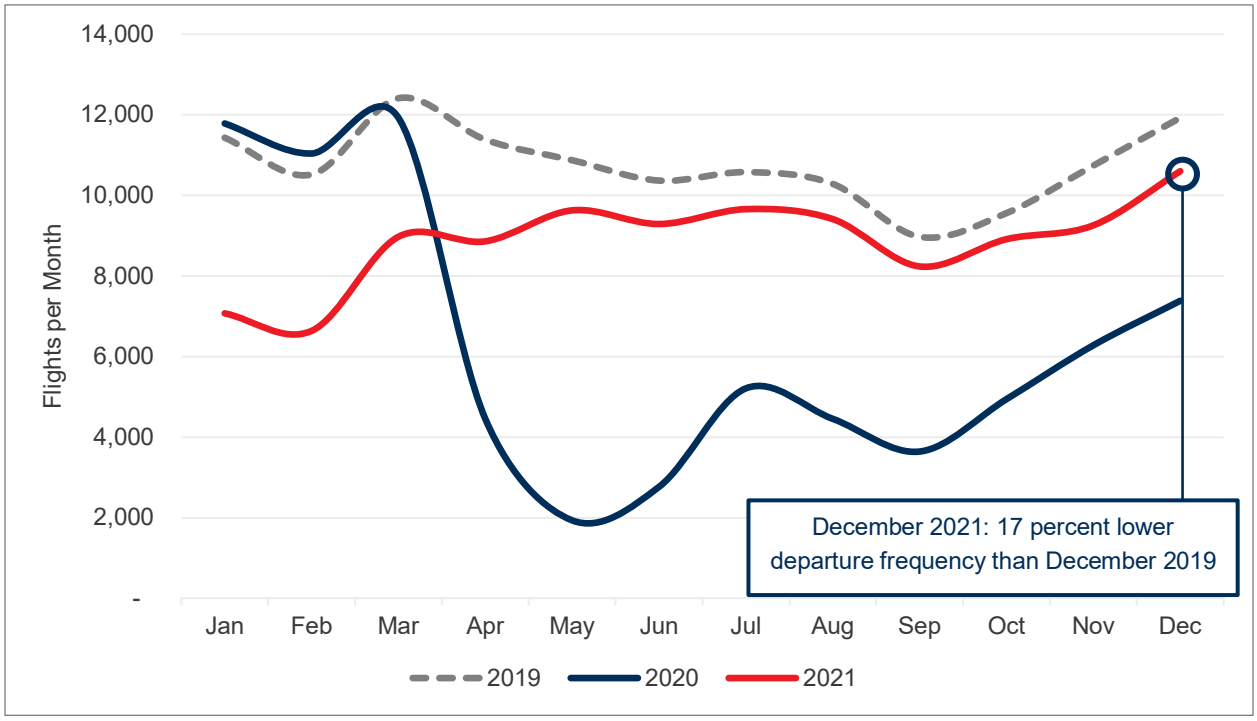
2.4.3.4. District 4

The following subsections provide airline schedule comparisons for each District 4 airport, including Fort Lauderdale/Hollywood International Airport (FLL), Palm Beach International Airport (PBI), and Vero Beach Regional Airport (VRB).

Fort Lauderdale/Hollywood International Airport (FLL)

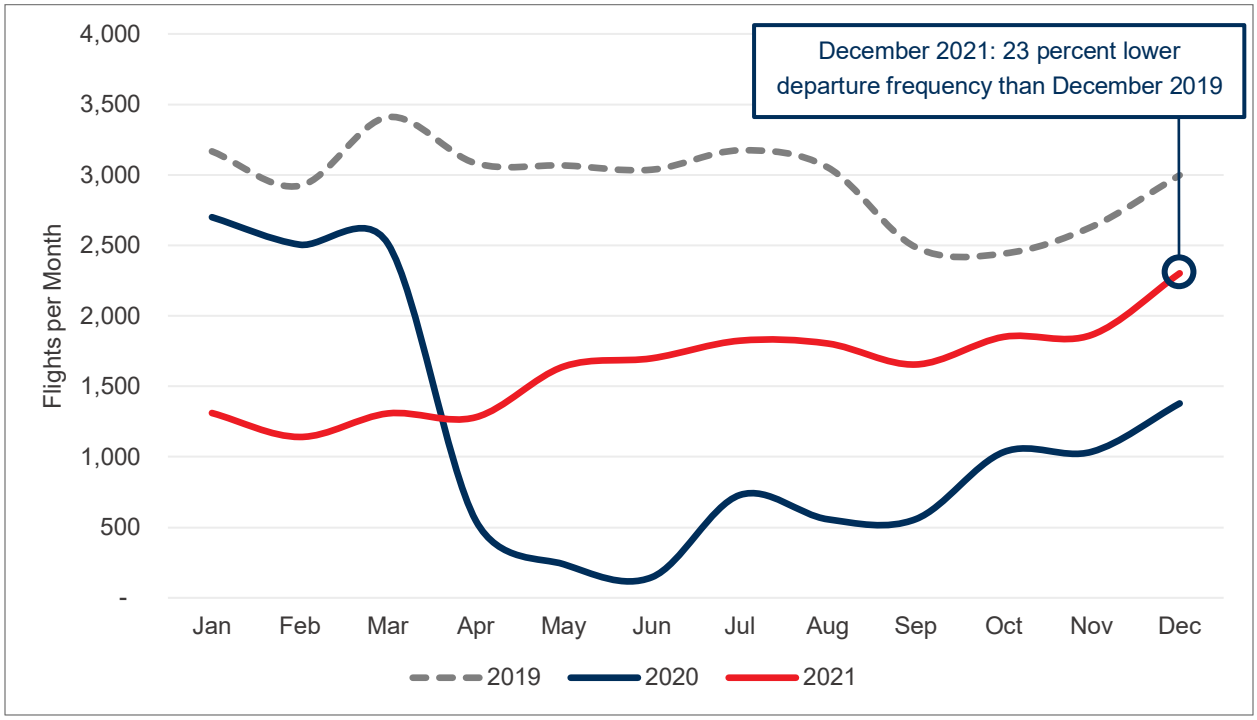
Fort Lauderdale/Hollywood International Airport is one of the busiest airports in Florida, serving the combined Fort Lauderdale, Palm Beach, and Miami areas. FLL receives a combination of leisure and business traffic and offers service to more than 130 domestic and international nonstop destinations. With FLL accommodating a considerable volume of international airline traffic, the pandemic had a major impact to the airport and has resulted in a slower recovery when compared to airports that do not serve such a high volume of international traffic. **Figure 2-35** illustrates the trend of scheduled flights out of FLL in 2019, 2020, and 2021, while **Figure 2-36** compares the frequency of international flights only. FLL's decline in airline traffic started in March 2020 and reached its lowest point in May 2020, when scheduled departure frequency decreased 82 percent compared to the same month in 2019. FLL witnessed a small recovery throughout the remainder of 2020 to finish the year 41 percent lower in scheduled departures from 2020 compared to 2019. Airlines continued to add more flights in 2021 with the rollout of vaccines and the large rebound in leisure traffic. Despite this additional traffic, scheduled departures in 2021 were still short of 2019 activity due to global travel restrictions limiting the international traffic recovery. Scheduled departures at FLL in 2021 were still 17 percent short of 2019 activity which is comprised of domestic and international traffic. This represents a modest recovery from 2020 but still well short of the recovery seen at other commercial service airports in Florida that accommodate mainly domestic leisure traffic.

Figure 2-35: FLL Scheduled Airline Departure Frequency Comparison – Domestic and International



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Figure 2-36: FLL Scheduled Airline Departure Frequency Comparison – International Only



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Historically, FLL was served by 25 airlines connecting the airport to upwards of 138 interstate and international destinations around the globe. The pandemic resulted in airlines cutting the number of destinations from FLL to nearly half (70 unique destinations in June 2020). This loss was largely centered around international travel with airlines cutting 39 international nonstop destinations from FLL between April and June 2020 in response to global travel restrictions. However, airlines have started to add back nonstop destinations to FLL throughout the remainder of 2020 and into 2021. By the end of 2021, FLL served 125 unique interstate and international destinations—only six destinations short of December 2019 and including new nonstop domestic destinations. The gap is tied with airlines not adding back all international nonstop destinations back to FLL. In December 2021, airlines served 43 international nonstop destinations from 2021 compared to 55 destinations in December 2019.

Examining FLL's top destinations served, all of which are large hub airports, each witnessed a significant decline in activity in 2020.[18] However, the relative recovery across the destinations in 2021 has varied. ATL, LGA, and Baltimore/Washington International Thurgood Marshall Airport (BWI) fell short of 2019 activity in 2021. However, 2021 scheduled departures to EWR and JFK exceeded the scheduled departure frequency seen in 2019. **Table 2-18** summarizes changes to departure frequency among the top destinations served by airlines at FLL.

Table 2-18: FLL Top Interstate Destinations[19]

Airport Name	FAA ID	2019 Frequency	2020 Frequency	2021 Frequency	% YoY Change 2019-2021
Hartsfield-Jackson Atlanta International	ATL	8,671	5,699	7,394	-15%
Newark Liberty International	EWR	4,998	3,405	5,037	<1%
LaGuardia	LGA	4,858	2,335	3,773	-22%
Baltimore/Washington International Thurgood Marshall	BWI	4,315	2,990	3,519	-18%
John F Kennedy International	JFK	3,896	2,460	3,913	<1%

Sources: OAG Schedule Analyzer, Kimley-Horn 2021

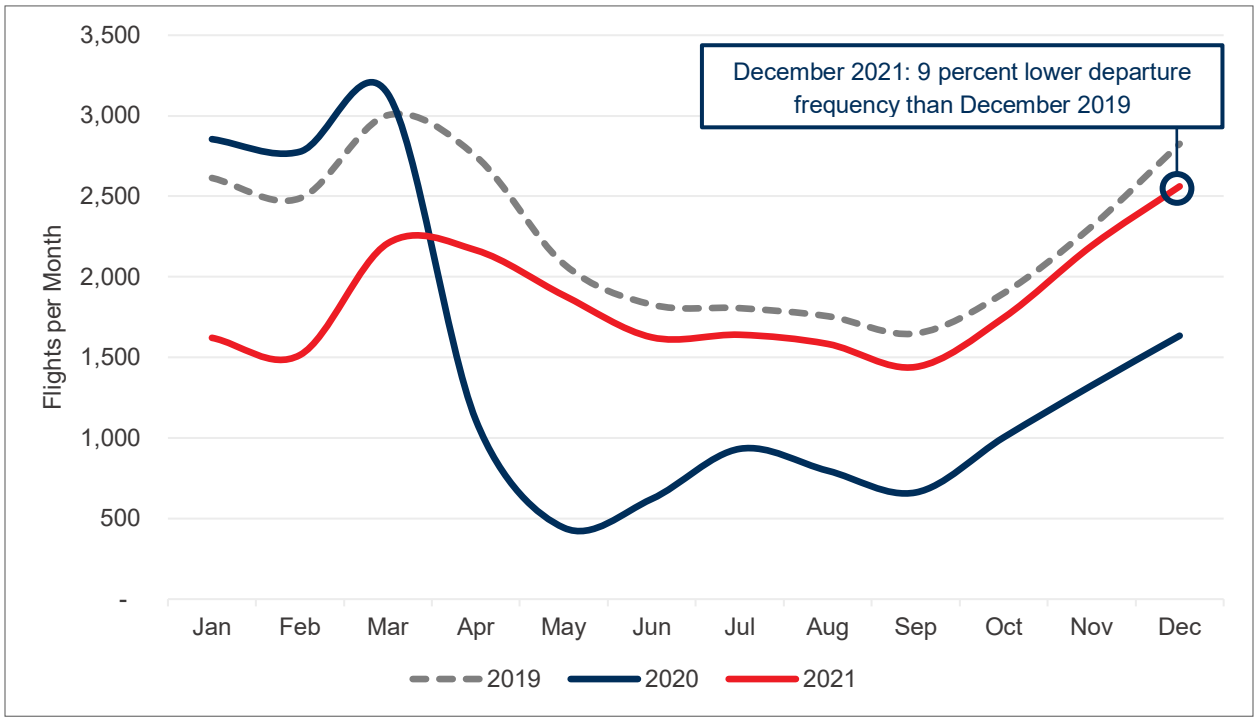
Palm Beach International Airport (PBI)

Palm Beach International Airport is located near West Palm Beach, which is approximately 40 miles north of Fort Lauderdale. West Palm Beach is a popular tourist destination and attracts a large volume of leisure travelers. The area is also a popular business destination with two convention centers attracting businesses to the region.[xiv] Given that business traffic has been slow to recover from the pandemic, PBI witnessed a large decline in scheduled departures and did not completely rebound to pre-pandemic levels by the end of 2021. **Figure 2-37** illustrates the trend of scheduled flights out of PBI in 2019, 2020, and

[18] Identifying the top five destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in subsequent years to be included in the top five but are still reflected in **Figure 2-35** and **Figure 2-36** for comparing the change in activity.
[19] Ibid.

2021. PBI started recording the impact of the pandemic in late Q1 2020, and by May 2020, airline traffic was down nearly 79 percent from the same month of the previous year. Airlines added some additional flights in subsequent months to accommodate a resurgence in summer leisure demand to the area, but traffic continued to lag behind 2019 activity. PBI recorded 36 percent fewer scheduled departures in 2020 compared to 2019. In response to the vaccine rollout and the summer 2021 surge in leisure traffic into Florida, airlines added back more flights in 2021 to come within 10 percent of 2019 scheduled departures. Despite this, PBI still finished 2021 with 18 percent fewer scheduled departures than 2019—a strong indication that corporate travel contributed greatly to the airport and has not recovered from the pandemic.

Figure 2-37: PBI Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Historically, PBI was served by 12 airlines that offered nonstop service to upwards of 30 total destinations, including up to four international destinations. As shown in **Table 2-19,** the top destinations served by airlines at PBI are all large airline hubs, and all destinations recorded a decline in scheduled departure frequency in 2020.[20] Airlines did add flights back to these destinations in 2021, but the year still ended with lower activity across the top five destinations when compared to 2019. Despite the loss in capacity in existing routes, the number of interstate and international nonstop destinations has rebounded in 2021. The number of nonstop destinations served from PBI in March and December 2021 was 33, compared to 30 unique destinations served during the same months in 2019. This includes all of the

[20] Identifying the top five destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to be included in the top five but are still reflected in **Figure 2-37** for comparing the change in activity.

international nonstop destinations served pre-pandemic. These results signify some signs of full recovery for PBI's air service schedules. **Table 2-19** summarizes changes to departure frequency among the top destinations served by airlines at PBI.

Table 2-19: PBI Top Interstate Destinations[21]

Airport Name	FAA ID	2019 Frequency	2020 Frequency	2021 Frequency	% YoY Change 2019-2021
Hartsfield-Jackson Atlanta International	ATL	4,135	2,425	3,448	-17%
Newark Liberty International	EWR	3,213	1,929	2,849	-11%
LaGuardia	LGA	2,689	1,098	1,438	-47%
General Edward Lawrence Logan International	BOS	2,087	1,235	1,077	-48%
Charlotte/Douglas International	CLT	1,909	1,539	2,010	5%

Sources: OAG Schedule Analyzer, Kimley-Horn 2021

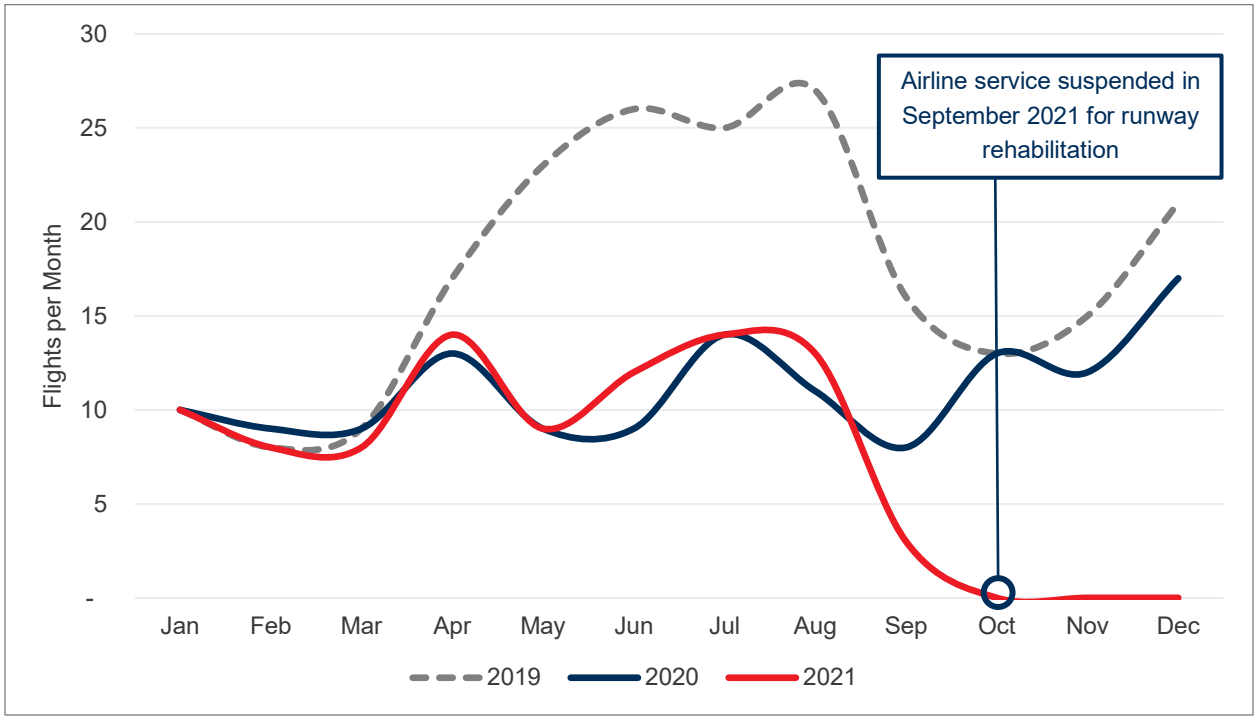
Vero Beach Regional Airport (VRB)

Vero Beach Regional Airport serves Vero Beach and the east coast of Florida between Port Canaveral and West Palm Beach.[22] VRB's commercial service activity is led by Elite Airways, a small Part 121 air carrier providing scheduled service for leisure travelers to connect from unique destinations in the northern U.S.. Similar to other leisure airports, VRB traditionally receives drastically higher levels of airline service during the summer months. Despite the historic leisure traffic into VRB, the airport witnessed a considerable impact from the pandemic. **Figure 2-38** illustrates the trend of scheduled flights out of VRB in 2019, 2020, and 2021. The impacts of the pandemic were first recorded at VRB in April 2020 and did not increase to match previous summer increases in flight schedules. By June 2020, scheduled departures from VRB were 65 percent lower YoY than June 2019. This amounted to between 10 and 15 flights monthly through the remainder of 2020, compared to approximately 25 monthly flights recorded in the summer 2019 season. This resulted in VRB ending 2020 recording 36 percent lower scheduled departures than 2019. In 2021, VRB largely followed the same departure frequency volume as late 2020 with approximately 10 monthly flights. This quickly changed in September 2020 with the airport suspending all airline operations due to a $8.5 million runway rehabilitation project projected to be completed in March 2022.[xv] As a result, Elite Airways relocated activity to nearby Melbourne International Airport (MLB) during the seven-month project.

[21] Identifying the top five destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to be included in the top five but are still reflected in **Figure 2-37** for comparing the change in activity.

[22] As of 02/01/22, VRB is classified as a nonprimary airport in the National Plan of Integrated Airport Systems (NPIAS). The airport is still included in this assessment to reflect the previous NPIAS classification as a primary non-hub airport.

Figure 2-38: VRB Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

In 2019, VRB only provided service to three destinations with varied operations throughout the year, including EWR (operates year-round), Portland International Airport (PWM, operates May – December), and Asheville Regional Airport (AVL, May – September). Service to all three destinations declined in 2020, with AVL service not restarting in 2020 and cut from Elite Airway's schedule. EWR and PWM did not recover completely from the pandemic in 2021. **Table 2-20** summarizes changes to departure frequency among VRB's destinations.

Table 2-20: VRB Top Interstate Destinations

Airport Name	FAA ID	2019 Frequency	2020 Frequency	2021 Frequency	% YoY Change 2019-2021
Newark Liberty International	EWR	132	106	56	-58%
Portland International Jetport	PWM	47	28	35	-40%
Asheville Regional	AVL	31	Discontinued Route	Discontinued Route	Discontinued Route

Sources: OAG Schedule Analyzer, Kimley-Horn 2021

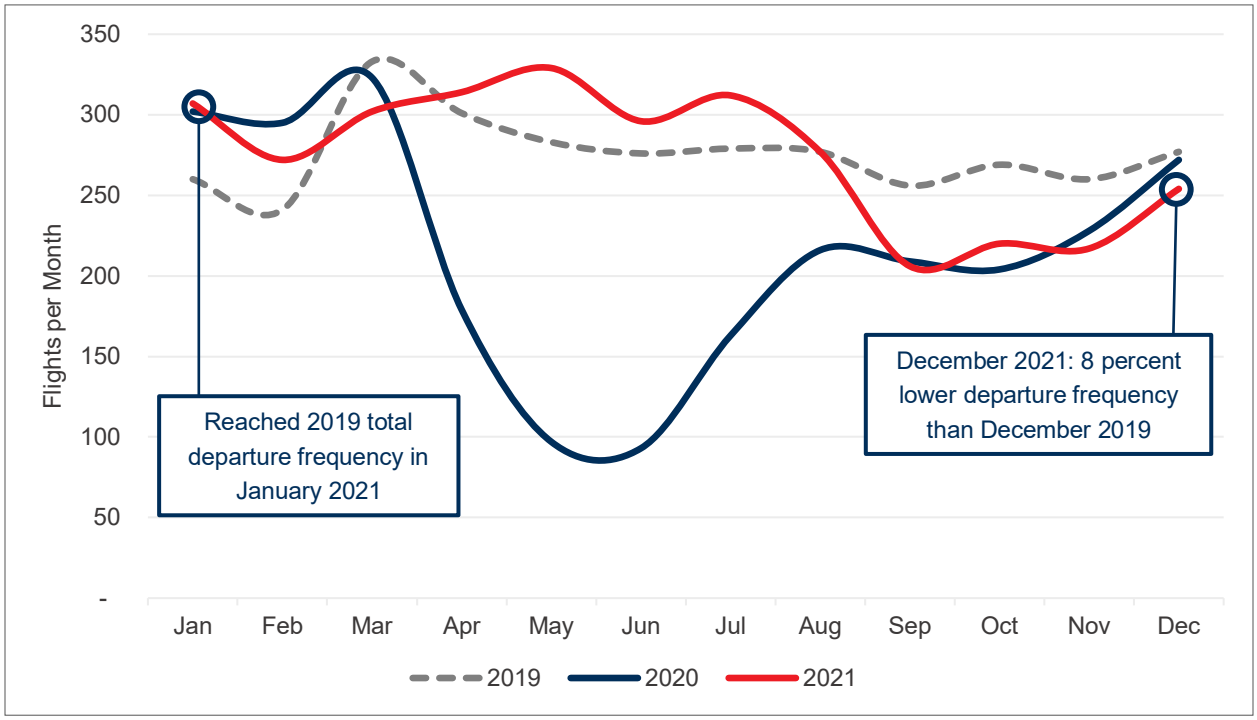
2.4.3.5. District 5

The following subsections provide airline schedule comparisons for each District 5 airport, which includes Daytona Beach International Airport (DAB), Melbourne International Airport (MLB), Orlando International Airport (MCO), and Orlando Sanford International Airport (SFB).

Daytona Beach International Airport (DAB)

Daytona Beach International Airport is located on the east central coast of Florida, three miles southwest of Daytona Beach and adjacent to the Daytona Motor Speedway. 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. As a result, DAB has witnessed a strong recovery from the pandemic in terms of scheduled airline departures. **Figure 2-39** illustrates the trend of scheduled flights out of DAB in 2019, 2020, and 2021. Similar to other airports, DAB first recorded the impacts of the pandemic in April 2020 with May recording the lowest activity (nearly 66 percent lower scheduled departures YoY than May 2019). Airlines quickly added back flights in subsequent months to close the gap to 18 percent by September 2020. This allowed DAB to record a relatively modest decline in scheduled departures throughout 2020 (22 percent decline compared to 2019) compared to other airports. Airlines added back flights in December 2020 and January 2021 resulting in more scheduled flights in the early months of 2021 than the same time in 2019 to accommodate a resurgence in spring leisure traffic to the area. DAB ended 2021 with 28 percent higher scheduled departures than 2020 and within one percent of 2019 activity.

Figure 2-39: DAB Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Historically, airlines provided up to four nonstop destinations from DAB including year-round service to ATL and CLT. The pandemic resulted in little impact to the level of nonstop service availability from DAB. However, ALT, and CLT recorded significant scheduling cuts. Despite some recovery in 2021, both destinations still recorded scheduling cuts between 19 and 25 percent in 2021 compared to 2019, which

was followed by a modest recovery in 2021. **Table 2-21** summarizes changes to departure frequency among the top destinations served by airlines at DAB.[23]

Table 2-21: DAB Top Interstate Destinations[24]

Airport Name	FAA ID	2019 Frequency	2020 Frequency	2021 Frequency	% YoY Change 2019-2021
Hartsfield-Jackson Atlanta International	ATL	1,718	1,283	1,364	-25%
Charlotte/Douglas International	CLT	1,546	1,255	1,512	-19%

Sources: OAG Schedule Analyzer, Kimley-Horn 2021

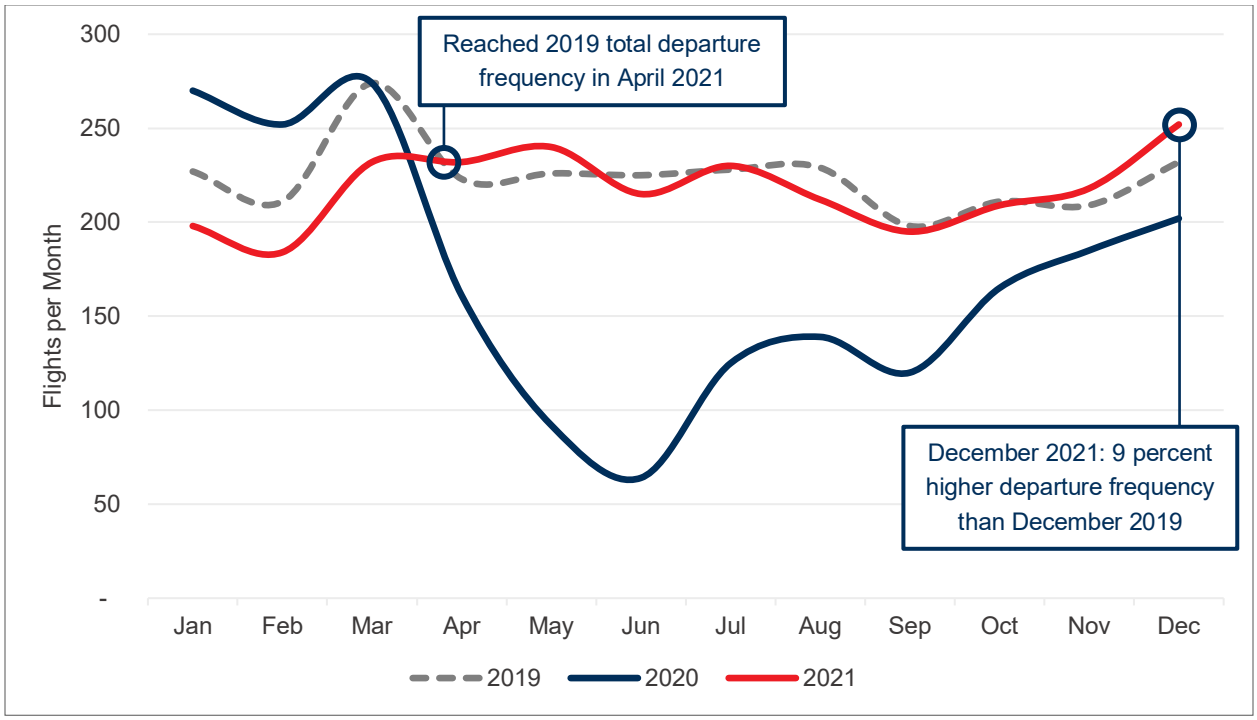
Melbourne International Airport (MLB)

Melbourne International Airport is located in Melbourne, which is just south of Cape Canaveral and 55 miles southeast of Orlando. Situated on Florida's east central coast, Melbourne is a vibrant beach destination and business center for Brevard County that generates considerable economic activity in the region. The popularity of Melbourne as a leisure market allowed the airport to recover from the pandemic by Q2 2021 in terms of scheduled airline departures. **Figure 2-40** illustrates the trend of scheduled flights out of MLB in 2019, 2020, and 2021. MLB and the entire Melbourne region were greatly 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 2020, 72 percent lower than the same month the prior year. Despite a rebound in the second half of 2020, MLB still ended the year with 24 percent less scheduled departures than 2019. However, MLB's continued recovery in early 2021 allowed the airport to reach 2019 activity by April 2021. MLB ended 2021 within three percent of 2019 scheduled departure volume, which was supported by relocated flight activity from VRB due to a runway rehabilitation project starting in September 2021.

[23] Identifying the top destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to warrant a comparison analysis but are still reflected in **Figure 2-39** for comparing the change in activity.

[24] Identifying the top destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to warrant a comparison analysis but are still reflected in **Figure 2-39** for comparing the change in activity.

Figure 2-40: MLB Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

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. Airline departures to top destinations, including ATL and CLT, declined in 2020 compared to 2019. However, American Airlines service to Philadelphia International Airport (PHL) increased dramatically from 2019, which has balanced out losses in departures to other destinations. In 2021, airlines added back nearly all flights to ATL and CLT from MLB to reach within five and one percent of 2019 schedule frequency, respectively. Additionally, airlines established seven nonstop destinations to MLB in November and December 2021—matching the nonstop service availability seen in early 2019 at the airport. **Table 2-22** summarizes changes to departure frequency among the top destinations served by airlines at MLB.[25]

[25] Identifying the top destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to warrant a comparison analysis but are still reflected in **Figure 1-33** for comparing the change in activity.

Table 2-22: MLB Top Interstate Destinations[26]

Airport Name	FAA ID	2019 Frequency	2020 Frequency	2021 Frequency	% YoY Change 2019-2021
Hartsfield-Jackson Atlanta International	ATL	1,437	1,030	1,357	-6%
Charlotte/Douglas International	CLT	1,103	896	1,100	<-1%
Philadelphia International	PHL	51	122	12	-76%

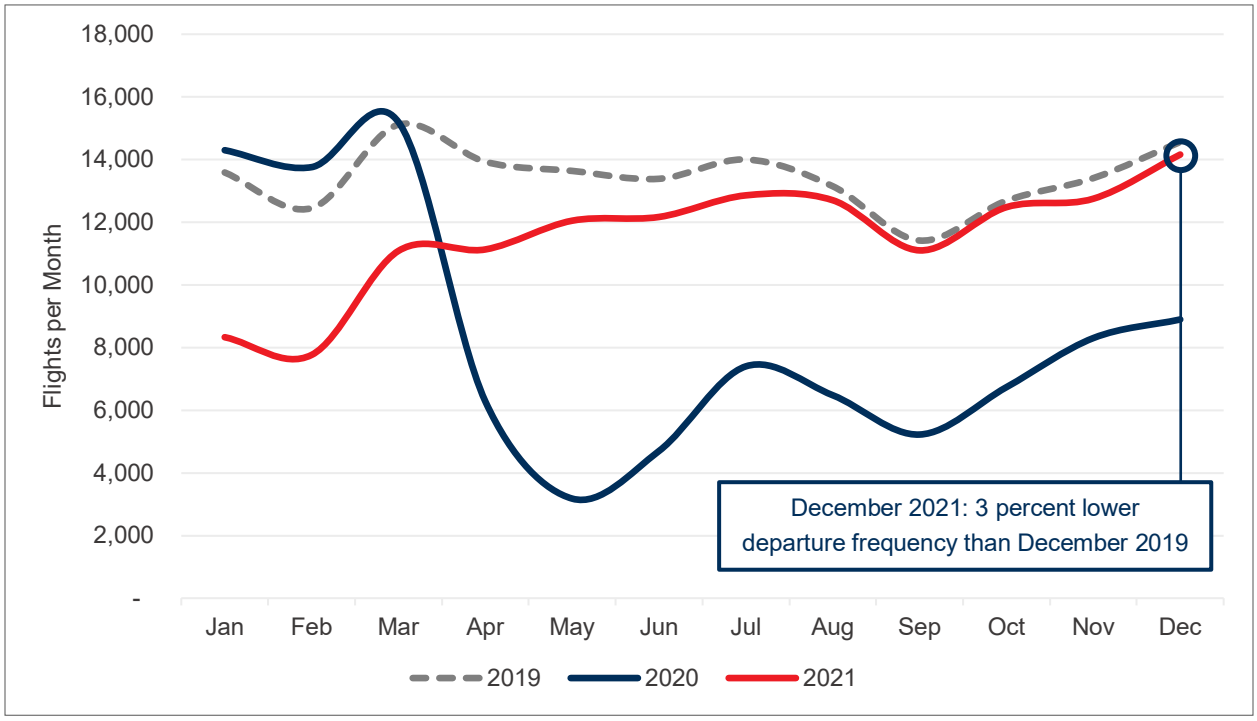
Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Orlando International Airport (MCO)

Orlando International Airport is the busiest domestic airport in Florida in terms of enplanements, welcoming more than 50 million passengers every year.[xvi] 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.[xvii] As a result, MCO welcomes a variety of leisure and business travelers from both domestic and international locations. With the combined business and international traffic that MCO relies on, the pandemic resulted in a sharp decline in schedule frequency and a relatively slow recovery throughout 2020 and 2021. **Figure 2-41** illustrates the trend of total scheduled flights (domestic and international) out of MCO in 2019, 2020, and 2021, while **Figure 2-42** compares the frequency of international flights only. MCO first began to experience the effects of the pandemic in April 2020, with the lowest scheduled departure frequency recorded in May 2020 at 3,178 departures, 77 percent lower than the same month in the prior year. Airlines added back nearly half of the lost flight activity to finish 2020 with 38 percent less total scheduled departures than 2019. The recovery was largely seen with MCO's domestic market that saw the gap close to 33 percent, compared to international flights that still recorded 69 percent lower scheduled departures in 2020 compared to 2019. Airlines continued to add flights to MCO in 2021, but still fell short of 2019 activity throughout the year largely due to global travel restrictions and slow recovery in business traffic. The majority of the recovery is centered around domestic and leisure travel.

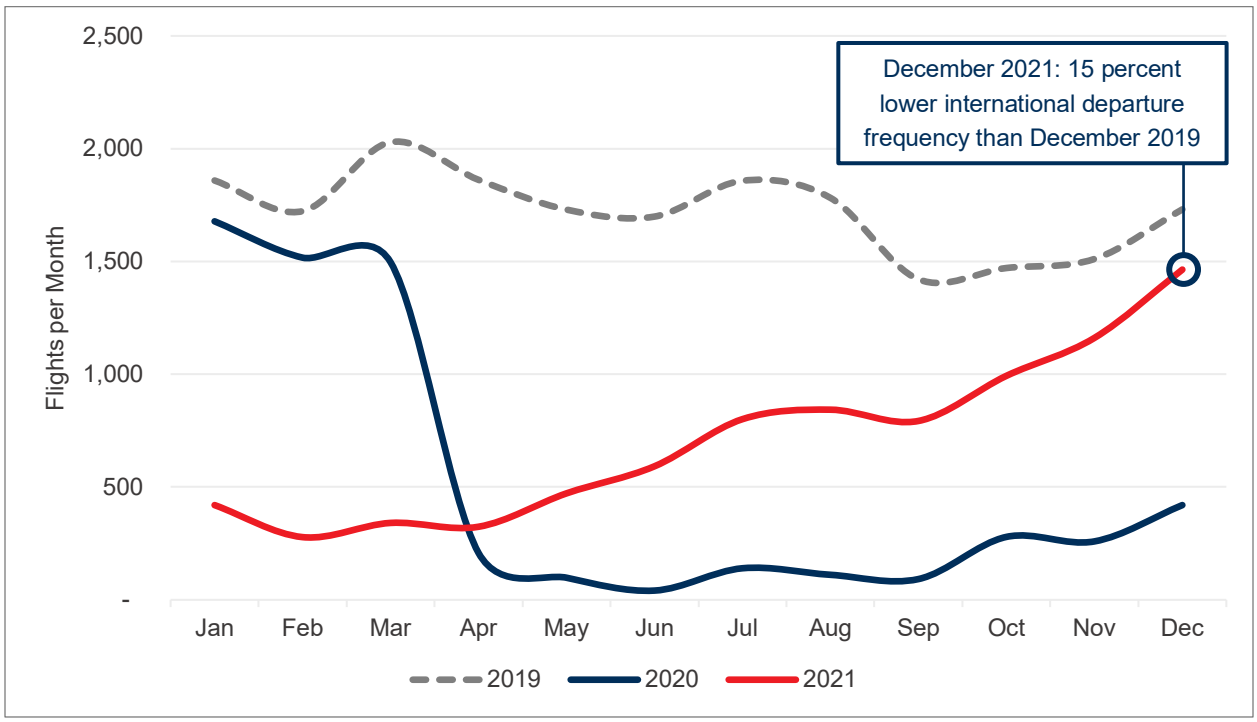
[26] Ibid.

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



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

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



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

In 2019, MCO was served by more than 30 carriers that offered 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 by June 2020, which reflects the trends in the entire aviation industry. This also translated to all the top five destinations from MCO experiencing a reduction of scheduled departures by at least 20 percent in 2020 compared to 2019.[27] Airlines added back flights to MCO's top destinations in 2021 to close the gap in flight volume significantly, but still fell short of 2019 activity for nearly all destinations. Luis Munoz Marin International Airport (SJU) surprisingly witnessed full recovery and even record setting levels of flights from MCO in 2021—an indication that flights to Latin America and the Caribbean are recovering well. **Table 2-23** summarizes changes to departure frequency among the top destinations served by airlines at MCO.

Table 2-23: MCO Top Interstate Destinations[28]

Airport Name	FAA ID	2019 Frequency	2020 Frequency	2021 Frequency	% YoY Change 2019-2021
Hartsfield-Jackson Atlanta International	ATL	9,387	5,947	7,373	-21%
Newark Liberty International	EWR	6,912	4,423	6,081	-12%
Philadelphia International	PHL	5,837	4,281	5,302	-9%
Luis Munoz Marin International	SJU	5,281	4,132	5,750	9%
Chicago O'Hare International	ORD	4,805	2,982	4,567	-5%

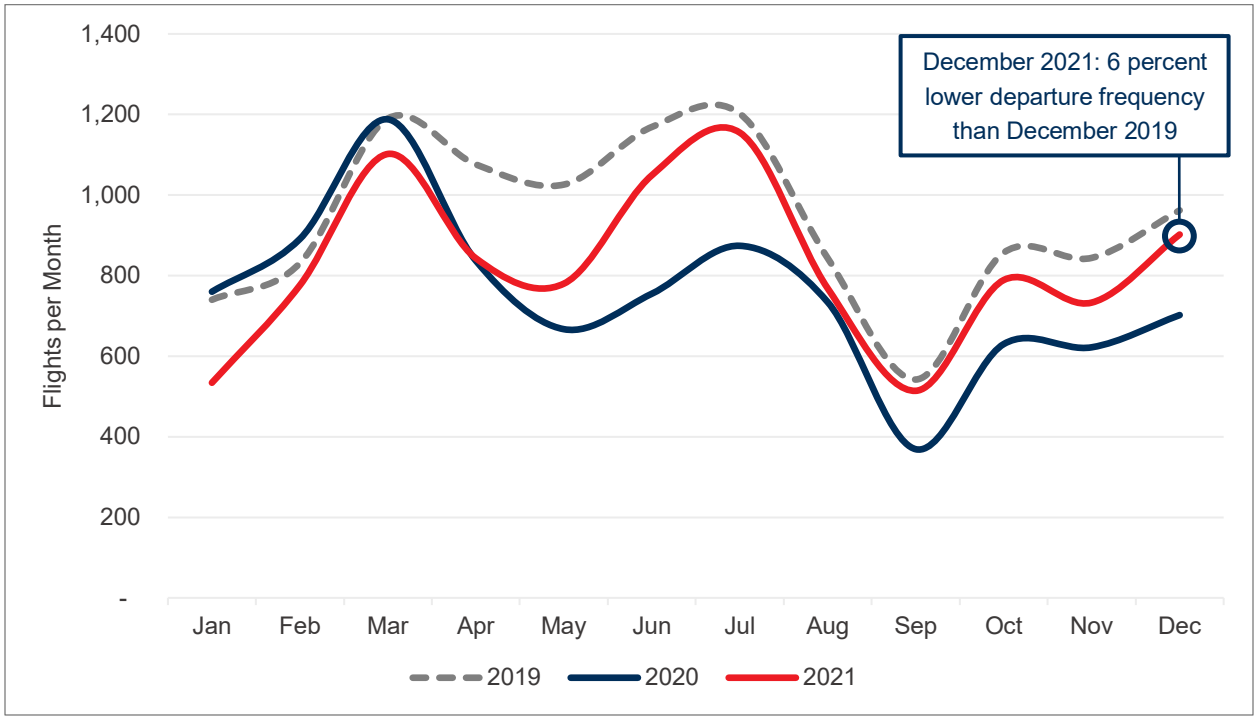
Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Orlando Sanford International Airport (SFB)

Orlando Sanford International Airport 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 during the pandemic when compared to other airports. **Figure 2-43** illustrates the trend of scheduled flights out of SFB in 2019, 2020, and 2021. The pandemic started to impact airline schedules in April 2020 and by June 2020, the scheduled departures from SFB had decreased by 35 percent when compared to the same month the previous year. However, airlines quickly added back flights to SFB to reach within 13 percent of activity by July 2020. Throughout the remainder of 2020 and all of 2021, SFB maintained a close trend in scheduled departures to 2019 activity to be within 10 percent of pre-pandemic activity in most months. As a result, SFB still ended 2021 with 11 percent fewer scheduled departures than 2019.

[27] Identifying the top five destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to be included in the top five but are still reflected in **Figure 2-41** and **Figure 2-42** for comparing the change in activity.
[28] Ibid.

Figure 2-43: SFB Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

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, Allegiant Airlines reduced the total number of available nonstop destinations by more than 17 percent, which in 2021 has not recovered to pre-pandemic levels. However, the schedule frequency seen across some of SFB's top five destinations were higher in 2021 than 2019, one indication of Allegiant Airlines adding back flights to accommodate a resurgence in snowbird activity.[29] SFB also witnessed the introduction of two new leisure-focused airlines (Flair Airlines and Swoop Airlines) in 2021 that started international nonstop service to several destinations in Canada.[xviii, xix] **Table 2-24** summarizes changes to departure frequency among the top five destinations served by Allegiant at SFB.

[29] Identifying the top five destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to be included in the top five but are still reflected in **Figure 1-36** for comparing the change in activity.

Table 2-24: SFB Top Interstate Destinations[30]

Airport Name	FAA ID	2019 Frequency	2020 Frequency	2021 Frequency	% YoY Change 2019-2021
McGhee Tyson	TYS	512	342	450	-12%
Lehigh Valley International	ABE	510	403	535	5%
Asheville Regional	AVL	473	405	508	7%
Gerald R Ford International	GRR	422	352	407	-4%
Cincinnati/Northern Kentucky International	CVG	385	356	432	12%

Sources: OAG Schedule Analyzer, Kimley-Horn 2021

2.4.3.6. District 6

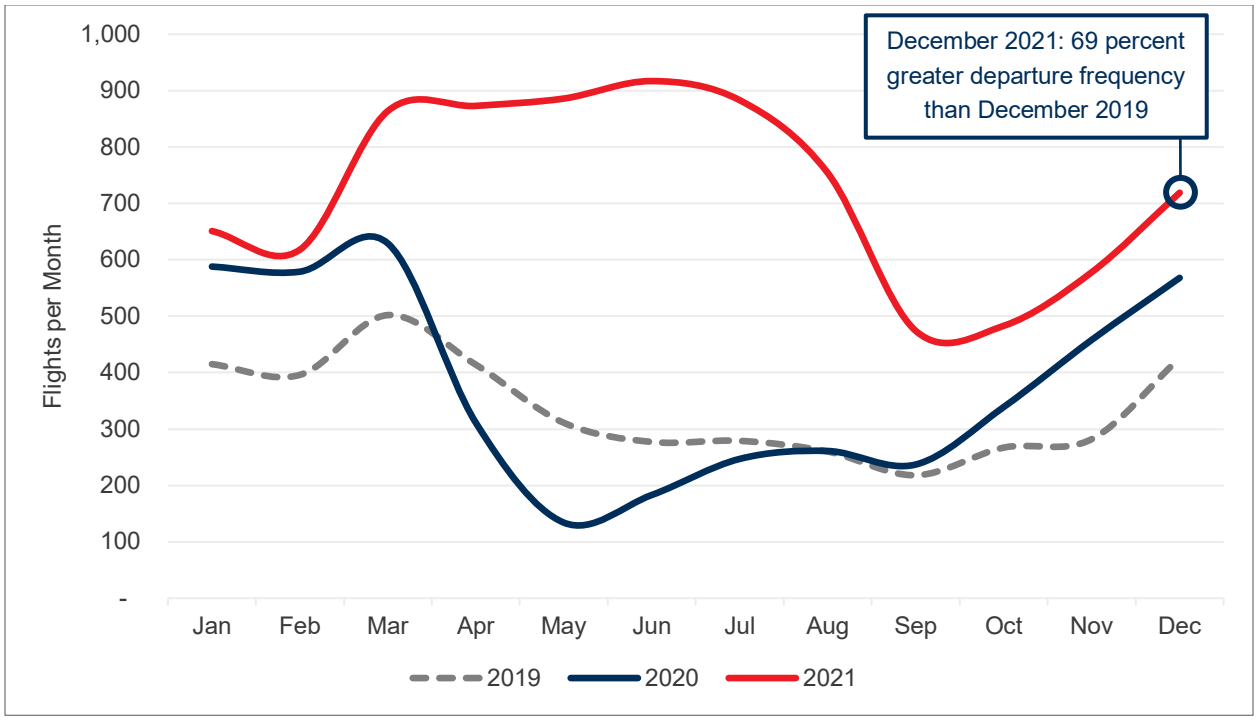
The following subsections provide airline schedule comparisons for each District 6 airport, which include Key West International Airport (EYW) and Miami International Airport (MIA).

Key West International Airport (EYW)

Key West International Airport primarily serves 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 in the spring and winter months. This allowed EYW to witness one of the quickest recovery periods of any Florida airport and EYW went on to experience record levels of activity throughout 2021. **Figure 2-44** illustrates the trend of scheduled flights out of EYW in 2019, 2020, and 2021. EYW first recorded the impact of the pandemic in April 2020 and by May, scheduled departures were 57 percent lower than the same month in the prior year. However, airline traffic rebounded quickly in June and July 2020, exceeding the number of flights scheduled in 2019 by August 2020. Scheduled departures from EYW continued to remain above 2019 frequency throughout the remainder of 2020, resulting in the airport accommodating 12 percent more scheduled flights in 2020 than 2019. In 2021, in response to the vaccine rollout in the early part of the year, airlines added a significant number of flights to EYW. By the end of 2021, EYW recorded 115 percent higher scheduled departures than 2019—indicating the largest rebound in activity seen across all of Florida's airports.

[30] Ibid.

Figure 2-44: EYW Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Historically, seven airlines provided year-round or seasonal nonstop service to eight airports in the U.S. 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 the top destinations from EYW in 2020, as some destinations, including EWR, recorded a decline in departure frequency while other airports, including ORD and DFW recorded increases in scheduled flights between 2019 and 2020.[31] In 2021, all five of EYW's top destinations recorded record levels of scheduled departures compared to 2019. Additionally, airlines added seven new nonstop destinations from EYW—a strong indication rising popularity of Key West. **Table 2-25** summarizes changes to departure frequency among the top destinations served by airlines at EYW.

[31] Identifying the top five destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to be included in the top five but are still reflected in **Figure 2-44** for comparing the change in activity.

Table 2-25: EYW Top Interstate Destinations[32]

Airport Name	FAA ID	2019 Frequency	2020 Frequency	2021 Frequency	% YoY Change 2019-2021
Hartsfield-Jackson Atlanta International	ATL	1,745	1,349	1,942	11%
Charlotte/Douglas International	CLT	758	1,100	1,517	100%
Newark Liberty International	EWR	558	390	811	45%
Dallas-Fort Worth International	DFW	363	461	625	72%
Chicago O'Hare International	ORD	313	526	931	197%

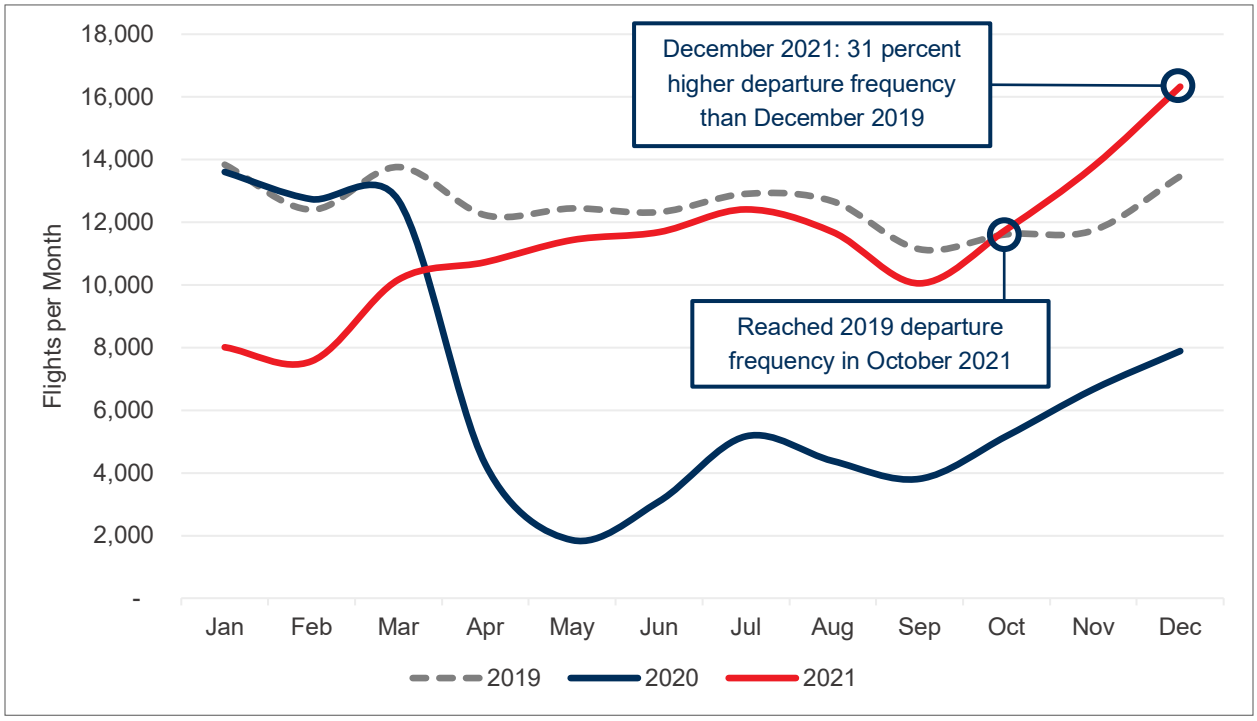
Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Miami International Airport (MIA)

Miami International Airport welcomes the most international visitors out of any airport in Florida and is one of the busiest airports in the nation. While FLL has a higher level of service 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. **Figure 2-45** illustrates the trend of scheduled flights out of MIA in 2019, 2020, and 2021, while **Figure 2-46** compares the frequency of international flights only. May 2020 experienced the lowest level of airline activity, with only 1,853 scheduled departures, 85 percent lower than May 2019. This is largely a result of nearly all international traffic being cut from MIA's airline schedules—nearly 95 percent in May 2020 compared to May 2019. Despite these drastic declines, total schedule departure frequency has rebounded considerably in 2021 as a result of the vaccine rollout in Q1-Q2 and easing of travel restrictions. By October 2021, MIA reached 2019 activity in terms of total scheduled departures (mostly tied to domestic travel) and exceeded pre-pandemic activity through the remainder of the year. MIA's international traffic recovered to pre-pandemic activity shortly after, between November and December 2021, when compared to the same timeframe in 2019. This domestic and international travel recovery helped support MIA in reaching within 10 percent of total scheduled departures in 2021. Additionally, easing of travel restrictions in Latin America and the Caribbean in 2021 supported MIA's return as a major international hub.

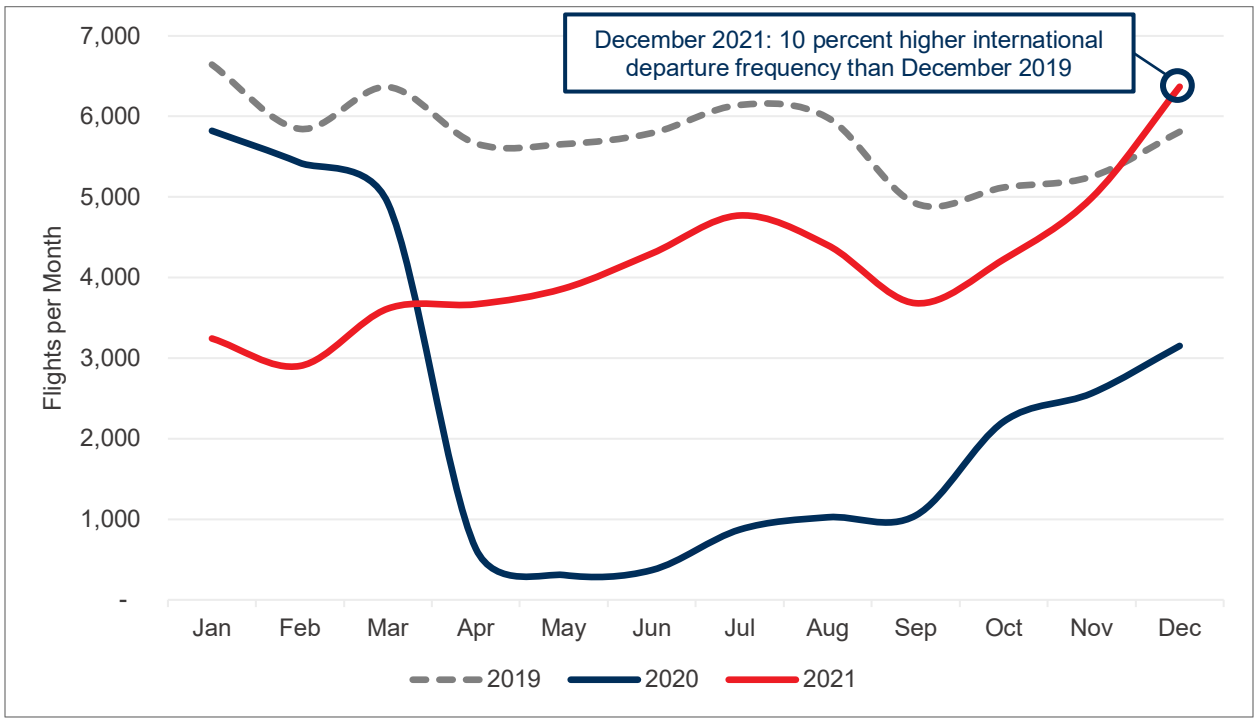
[32] Ibid.

Figure 2-45: MIA Scheduled Airline Departure Frequency Comparison – Domestic and International



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Figure 2-46: MIA Scheduled Airline Departure Frequency Comparison – International Only



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

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.[33] However, many of these top destinations have recovered significantly in 2021. **Table 2-26** summarizes changes to departure frequency among the top destinations served by airlines at MIA.

Table 2-26: MIA Top Interstate Destinations[34]

Airport Name	FAA ID	2019 Frequency	2020 Frequency	2021 Frequency	% YoY Change 2019-2021
Hartsfield-Jackson Atlanta International	ATL	7,010	4,028	6,997	<-1%
LaGuardia	LGA	5,742	2,904	4,133	-28%
Chicago O'Hare International	ORD	4,128	2,983	3,719	-10%
Dallas-Fort Worth International	DFW	3,728	3,011	3,431	-8%
John F Kennedy International	JFK	3,567	2,027	5,480	54%

Sources: OAG Schedule Analyzer, Kimley-Horn 2021

2.4.3.7. District 7

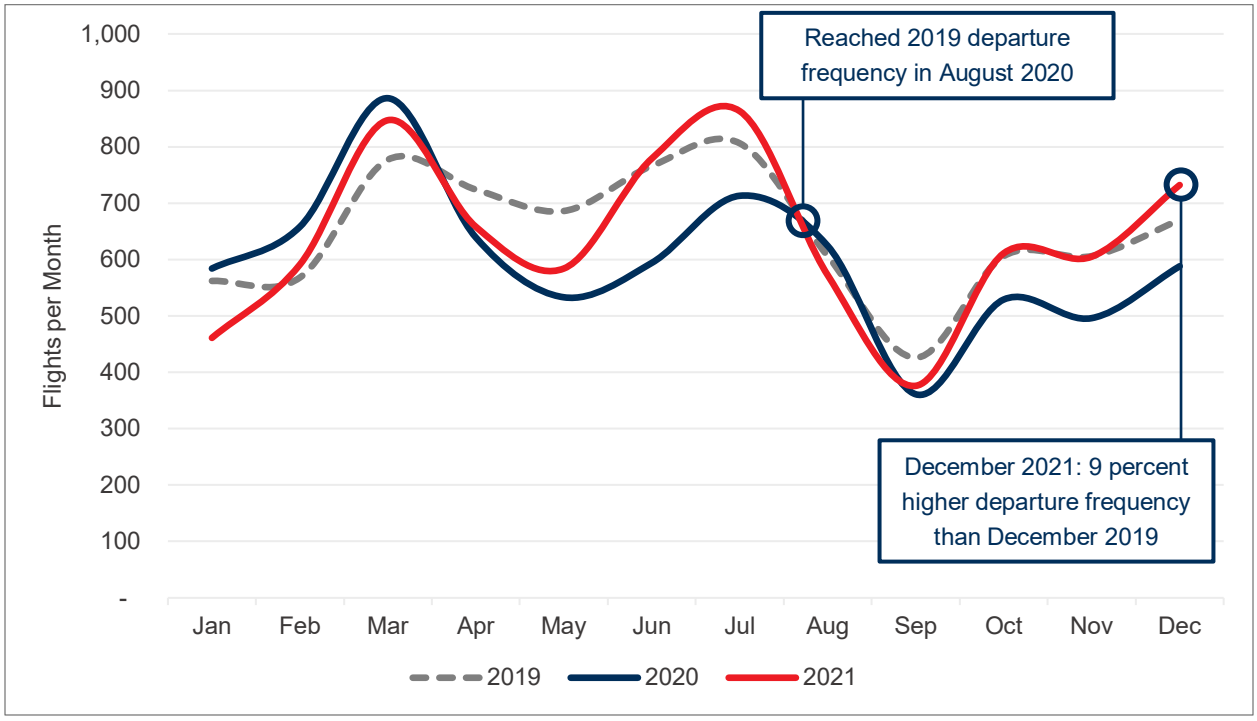
The following subsections provide airline schedule comparisons for each District 7 airport, which include St. Pete-Clearwater International Airport (PIE) and Tampa International Airport (TPA).

St. Pete-Clearwater International Airport (PIE)

St. Pete-Clearwater International Airport is 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 and accounts for nearly all the activity at the airport. PIE primarily serves leisure travelers and experiences cyclical activity that corresponds with peak travel seasons. Similar to other leisure market focused airports, the impacts of the pandemic at PIE were relatively modest. **Figure 2-47** illustrates the trend of scheduled flights out of PIE in 2019, 2020, and 2021. The decline in scheduled departures began in April 2020 and bottomed out in May 2020, when scheduled departures decreased 22 percent from the prior year. Traffic quickly rebounded in June and July 2020 as the airport reached its traditional peak travel season and largely trended around pre-pandemic activity throughout 2020 and 2021.

[33] Identifying the top five destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to be included in the top five but are still reflected in **Figure 2-45** and **Figure 2-46** for comparing the change in activity.
[34] Ibid.

Figure 2-47: PIE Scheduled Airline Departure Frequency Comparison



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Prior to the pandemic, Allegiant Airlines provided service from PIE to more than 50 destinations ranging from small regional airports to hubs in the northeastern U.S. Similar to the impacts to scheduled departures, airlines temporarily cut only a few nonstop destinations between April and June 2020. Additionally, airlines reduced service to many destinations, including all five of the top destinations served at PIE.[35] However, airlines quickly added back flight activity to PIE to regain the lost nonstop availability from the airport in Q3 2020. This was complemented with the top routes for PIE rebounding significantly in 2021 with four of the top five destinations already having scheduled departure frequency higher than total 2020 activity. In particular, CVG exceeded total 2019 activity in 2021. **Table 2-27** summarizes changes to departure frequency among the top destinations served by airlines at PIE.

[35] Identifying the top five destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to be included in the top five but are still reflected in **Figure 2-47** for comparing the change in activity.

Table 2-27: PIE Top Interstate Destinations[36]

Airport Name	FAA ID	2019 Frequency	2020 Frequency	2021 Frequency	% YoY Change 2019-2021
Asheville Regional	AVL	476	345	416	-13%
Cincinnati/Northern Kentucky International	CVG	381	370	469	23%
Gerald R Ford International	GRR	363	349	346	-5%
Concord	USA	350	243	307	-12%
Indianapolis International	IND	339	285	293	-14%

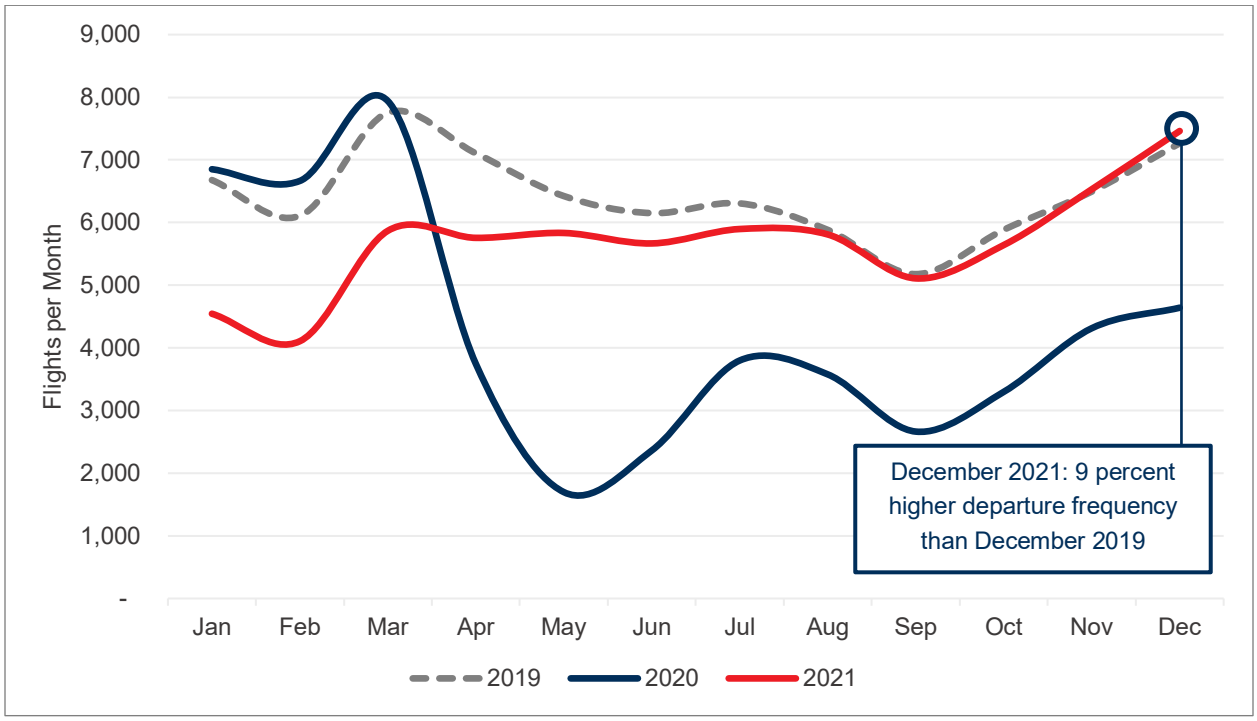
Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Tampa International Airport (TPA)

Tampa International Airport is one Florida's four large hub airports and acts as the primary commercial service airport for the greater Tampa-St. Petersburg Metropolitan Area. TPA receives both leisure and business traffic carried by the more than 20 domestic and international airlines that operate at the airport. Due to the pandemic resulting in global travel restrictions and a significant decline in business activity, TPA experienced one of the largest declines in scheduled departures among all Florida airports. **Figure 2-48** illustrates the trend of all scheduled flights out of TPA in 2019, 2020, and 2021, while **Figure 2-49** compares the frequency of international flights only. TPA's departure frequency reached its lowest point in May 2020 when total departures amounted to only 1,698, nearly 74 percent lower than the same month in 2019. In terms of international airline service, TPA witnessed a sharp decline, to near zero levels, in May 2020 and remained below 10 percent of the previous year's traffic through November 2020. Total scheduled departures rebounded throughout the remainder of 2020 finishing the year 33 percent lower than 2019. In 2021, in response to the rollout of COVID-19 vaccines in Q1, airlines added a significant number of flights back to TPA in the early part of the year. With a gradual increase in activity through the remainder of 2021, TPA reached 2019 activity levels in November 2021, an indication that new leisure demand covered some of TPA's lost international service. TPA ended 2021 with 12 percent lower scheduled departures than 2019.

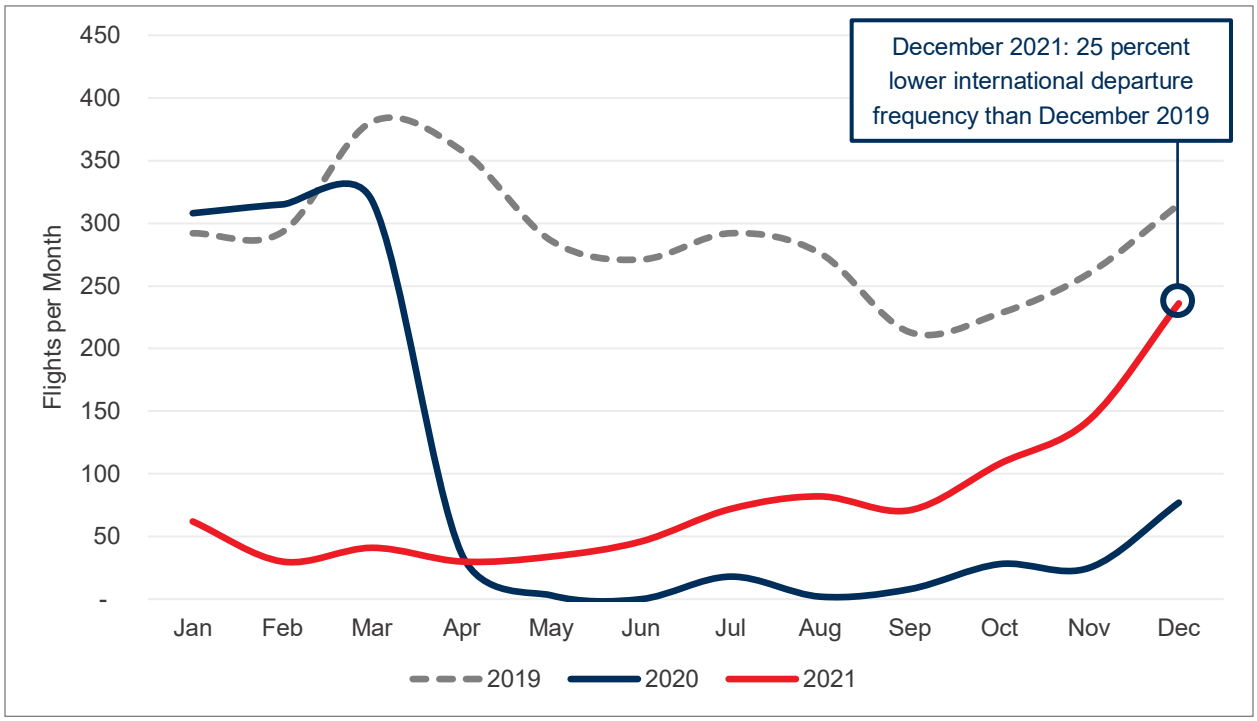
[36] Identifying the top five destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to be included in the top five but are still reflected in **Figure 2-47** for comparing the change in activity.

Figure 2-48: TPA Scheduled Airline Departure Frequency Comparison – Domestic and International



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

Figure 2-49: TPA Scheduled Airline Departure Frequency Comparison – International Only



Sources: OAG Schedule Analyzer, Kimley-Horn 2021

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, including reducing flight frequency to the top five destinations served at TPA.[37] All of the top destinations from TPA experienced some recovery in 2021, but most still fell short of 2019 activity. ORD was an exception with 15 percent higher scheduled departures from TPA than 2019. **Table 2-28** summarizes changes to departure frequency among the top destinations served by airlines at TPA.

Table 2-28: TPA Top Interstate Destinations[38]

Airport Name	FAA ID	2019 Frequency	2020 Frequency	2021 Frequency	% YoY Change 2019-2021
Hartsfield-Jackson Atlanta International	ATL	7,235	4,731	5,885	-19%
Charlotte/Douglas International	CLT	3,352	2,496	2,883	-14%
Baltimore/Washington International Thurgood Marshall	BWI	3,012	2,514	2,619	-13%
Chicago O'Hare International	ORD	2,991	2,082	3,446	15%
Philadelphia International	PHL	2,975	2,122	2,472	-17%

Sources: OAG Schedule Analyzer, Kimley-Horn 2021

2.5. Summary

The pandemic forced nearly all airlines to make unprecedented system capacity cuts across their respective networks. This translated into at least an initial decline in schedules among all 20 commercial service airports in Florida. However, the rate of decline varied greatly across the airports based on the type of passenger activity and the level of international service accommodated. The overall trends found that airports primarily supporting domestic and/or leisure traffic fared much better during the pandemic than those that supported more international visitors, and they relied more heavily on business traffic. This translated to many airports in Florida witnessing a full recovery and even some record-breaking activity in 2021. In terms of scheduled departure frequency, seven of Florida's commercial service airports achieved recovery in 2021 compared to 2019. With the confluence of the COVID-19 vaccine rollout, easing of travel restrictions, and the lure of Florida's world-renowned beaches and tourism destinations, most of Florida's commercial service airports have begun to support considerable volumes of traffic once more.

[37] Identifying the top five destinations served was based off 2019 frequency. Some destinations may not have witnessed enough service in 2019 to be included in the top five but are still reflected in **Figure 2–48** and **Figure 2–49** for comparing the change in activity.
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2.6. References

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Chapter 3. Airport Forecasts and Recovery

3.1. Introduction

Since the COVID-19 pandemic began more than two years ago, the global airline and aviation industry has experienced both massive declines and unprecedented activity growth. The Florida Department of Transportation (FDOT) Aviation Office (AO) commissioned this analysis to document the changes recorded at the 20 commercial service airports since the start of the pandemic and forecast the recovery and future traffic growth of these facilities. While previous versions of this study relied on industry projections and qualitative information, this analysis utilizes more than two years of accurate passenger traffic data to develop a forecasting analysis. The forecasting analysis is provided in the following sections:

- Background
- Methodology
- Forecast Results

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 on numerous conditions and circumstances that cannot be accurately analyzed at this time.

3.2. Background

While airports have provided both quantitative and anecdotal data for nearly two years since the pandemic began, additional industry-wide background information is needed in forecasting analyses to provide context and help identify trends among similar data sets. As discussed in Chapter 1, there have been a number of trends that have emerged in the global airline industry since the beginning of the pandemic. Namely, industry-wide data and projections indicate that leisure travel is recovering faster than business travel, meaning that airports with high quantities of leisure airlines and travelers are likely to recover sooner than airports with business-focused passenger traffic.

Additionally, ongoing travel restrictions have hampered the recovery of international airline service. While U.S. domestic traffic has returned to pre-pandemic levels at nearly all airports, international traffic continues to lag. According to the International Air Transport Association (IATA), Global international airline traffic is not expected to recover until late 2024, with certain regions (Asia/Pacific) lagging even further behind.[1] These key trends will provide insight as to why Florida's 20 commercial service airports have recovered as varying rates.

[1] IATA. (March 2022). "Air Passenger Numbers to Recover in 2024". Available online at: https://www.iata.org/en/pressroom/2022-releases/2022-03-01-01/ (accessed March 2022)

3.2.1. Airport Responses

Representatives from each of Florida's 20 commercial service airports were asked to provide information regarding any potential scenarios or forecasts developed to project their airport's traffic recovery period. This information, combined with other quantitative information received from airports, provided context for the development of forecasts at each respective facility. In total, 11 airport representatives reported that their airport had developed some form of recovery plan with a forecast component. 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	Nonhub	No
Destin-Fort Walton Beach	Destin/Fort Walton Beach	VPS	Small	No
Fort Lauderdale/ Hollywood International	Fort Lauderdale	FLL	Large	Yes
Gainesville Regional	Gainesville	GNV	Nonhub	Yes
Jacksonville International	Jacksonville	JAX	Medium	Yes
Key West International	Key West	EYW	Nonhub	No
Melbourne International	Melbourne	MLB	Small	No
Miami International	Miami	MIA	Large	Yes
Northwest Florida Beaches International	Panama City	ECP	Small	Yes
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	No
Punta Gorda	Punta Gorda	PGD	Small	Yes
Sarasota/Bradenton International	Sarasota/ Bradenton	SRQ	Small	No
Southwest Florida International	Fort Myers	RSW	Medium	Yes
St. Pete-Clearwater International	St. Petersburg/ Clearwater	PIE	Small	Yes
Tallahassee International	Tallahassee	TLH	Non	No
Tampa International	Tampa	TPA	Large	No
Vero Beach Regional	Vero Beach	VRB	Nonhub	No

Sources: Fall 2021 COVID-19 Airport Outreach Survey, 2021-2025 FAA NPIAS Report

3.3. Methodology

Due to diverse economic circumstances in various regions of the state and the world, each airport has recovered from the pandemic in its own unique way. It is critical to develop a methodology that addresses these differences, while maintaining an equitable projection of growth. Insights previously provided by airport representatives have made it obvious that, while minor difference exist between all airports, there is a significant gap between the recovery of the four large hub airports and the remaining non, small, and medium hub airports. As such, the methodology used to develop forecasts for non, small, and medium hub airports must differ from that used by the large hub facilities. The following sections describe the data collection process used to develop all forecasts, as well as the separate methodologies developed for non, small, and medium hub airports and large hub airports.

3.3.1. Data Collection

The FDOT AO provided historic passenger traffic data for each of Florida's commercial service airports through its 2015-2021 Monthly Passenger Boarding Sheets. Monthly enplanement data were also obtained for each airport from 2000 to 2019 from the FAA's Terminal Area Forecast (TAF) to provide supplemental context to each airport's recovery trends. This forecast considered that the baseline for all future traffic growth is each airport's passenger enplanements in 2019. Passenger enplanement levels were measured both as an actual number of monthly enplanements and as a percentage of same-month 2019 traffic. For example, if an airport reported 10,000 passenger enplanements in July 2019 and 7,500 enplanements in July 2020, the traffic level would be reported as 75 percent of 2019.

3.3.2. Non, Small, and Medium Hub Airport Forecasts

Florida's 16 non, small, and medium hub airports support mostly domestic airline traffic, isolating them from many of the international travel restrictions that affected much of the industry. For those airports in this category that support international airline service, the share of international passengers is small enough to have minimal effects on the overall traffic trends at the airport. As such, forecasts were developed using the combined number of domestic and international passenger enplanements occurring each month.

Actual passenger traffic data for each airport was obtained through December 2021. The data were communicated as both a number and as a percentage of 2019, allowing for YoY comparisons. The actual traffic data supported the development of a compound monthly growth rate (CMGR) of passenger traffic at each airport between July 2020 and December 2021, serving as the baseline growth rate.

The CMGR for each airport was reduced by half to acknowledge the possibility of slow growth due to uncertainty surrounding future COVID-19 variants, as well as to adjust for some of the extremely high passenger returns that were experienced in Florida. This new CMGR—named the 'recovery' growth rate—was then applied to the respective facility's actual traffic level to develop a forecasted growth beginning in January 2022. The recovery growth rate was applied from the forecast start until enplanements reached 2019 levels at the respective airport.

At this point, a historic CMGR was derived from the 2000-2019 TAF data and was applied to the enplanement levels from the time of recovery through the end of the forecast period. For airports which had already recovered to 2019 levels, the recovery growth rate was not applied. Instead, the 20-year CMGR was applied to these airports beginning in January 2022 and extending through the end of the

forecast period. The use of a 20-year historical growth rate reflects trends experienced at each airport prior to the COVID-19 pandemic, which are likely to resume as the industry recovers.

Table 3-2 presents an example of how the forecast was developed for Orlando-Sanford International Airport. In this case, traffic increased from 41 percent of 2019 levels in July 2020 to 92 percent of 2019 traffic levels in December 2021, representing a 3.2 percent CMGR. This CMGR was then divided by half and applied to 2022 until traffic reached 100 percent of 2019 levels. At that time, the 20-year historical CMGR (0.5 percent) was applied.

Table 3-2: Example Small Hub Forecast Development

Month	Traffic Level (% of 2019 Traffic)	Growth Rate
Actual Data (18-month CMGR: 3.2%)		
July '20	41%	N/A
August '20	40%	-1.3%
September '20	54%	33.9%
October '20	57%	5.5%
November '20	55%	-3.6%
December '21	47%	-14.1%
January '21	55%	+16.2%
February '21	56%	+1.3%
March '21	58%	+4.6%
April '21	68%	+17.2%
May '21	69%	+0.8%
June '21	94%	+36.9%
July '21	95%	0.9%
August '21	85%	-10.1%
September '21	97%	14.0%
October '21	87%	-10.2%
November '21	89%	2.2%
December '21	92%	2.9%

Month	Traffic Level (% of 2019 Traffic)	Growth Rate
Forecast Begins (Applied Recovery CMGR)		
January '22	93%	+1.6%
February '22	95%	+1.6%
March '22	96%	+1.6%
April '22	98%	+1.6%
May '22	99%	+1.6%
June '22	101%	+1.6%
Full Recovery (Historic CMGR Begins)		
July '22	101%	+0.5%
August '22	102%	+0.5%
September '22	102%	+0.5%
October '22	103%	+0.5%
November '22	104%	+0.5%
December '22	104%	+0.5%
January '22 – December '25		+0.5%/month

Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2022; Kimley-Horn, 2022

It is important to note that some airport forecasts did not utilize TAF data for the full 20-year period due to limited or consistent data. Of these airports, some have been served by airlines for less than 20 years or have experienced significant shifts in demand that do not accurately reflect more recent trends at the airport.[2]

[2] The forecasts for the following airports utilized less than 20 years of historic data: Northwest Florida Beaches International (10 years), Punta Gorda (12 years), Melbourne International (9 years), and Vero Beach (4 years).

3.3.3. Large Hub Airports

Florida is home to four large-hub airports that support most of the international passenger traffic in the state and are influenced by trends within the larger international air travel market. It is necessary to acknowledge the different rates at which international and domestic traffic has recovered from the pandemic. While domestic passenger traffic at most airports has recovered to pre-pandemic levels, international traffic levels are not expected to fully recover for 3-5 years. Therefore, the international and domestic traffic forecasts were separated for the four large hub airports in the state.

The data obtained from the FDOT Monthly Passenger Boarding Sheets were separated between international enplanements and domestic enplanements for each of the four airports. For domestic enplanements, a CMGR was derived from actual enplanement numbers recorded between July 2020 and December 2021. This 'recovery' CMGR was then applied to develop a forecast beginning in January 2022. Once domestic passenger enplanements reached 2019 levels, the monthly growth rate reverted to the 20-year historic CMGR derived from TAF data in a similar fashion to the non, small, and medium hub airports.[3]

Development of the international passenger traffic forecast for the four large hub airports relied on projections obtained from the airports and industry organizations. A CMGR was derived from the monthly international enplanements recorded at each airport between July 2020 and December 2020. This international recovery growth rate was then adjusted to align the projected recovery date with what was provided by representatives from the respective airports. The international recovery growth rate was applied beginning in January 2021 and extending until international traffic levels returned to 2019 levels, at which point the 20-year historic CMGR was applied.

While the growth of domestic and international traffic was developed separately for these airports, the results of each were presented as a singular forecast representing total passenger enplanements at each airport. The projected number of domestic and international passenger enplanements were combined each month and compared against total 2019 enplanements to determine an overall recovery date for each airport.

3.4. Forecast Results

The following analysis documents the projected airline passenger traffic levels in Florida between 2020 and 2025. Generally, all airports have recorded substantial growth since the start of the pandemic and passenger traffic at many airports has already surpassed 2019 levels. 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 present at many airports, and although the number of passenger enplanements may decrease month-to-month, the scenario represents steady YoY growth. Trendlines have been included in each forecast to illustrate the 12-month moving average in passenger traffic levels, showing steady growth during the forecasting

[3] 20-year historic CMGRs were not separated between domestic and international traffic as FAA TAF data only records total annual enplanements. As such, the 20-year CMGR was derived from total enplanements and applied to both domestic and international enplanements after recovery is reached.

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.

3.4.1. Individual Airport Recovery Forecasts

The pandemic affected Florida's FDOT regions in different ways, both from an infection rate and economic standpoint. As a result of this and other industry factors, each airport in Florida experienced different impacts and is currently recovering or has recovered in their own unique fashion. This subsection presents the activity forecasts for the 20 individual commercial service airports in the state, half of whom have already recovered to 2019 traffic levels. Airport forecasts are organized sequentially by FDOT District in the following seven subsections.

3.4.1.1. District 1

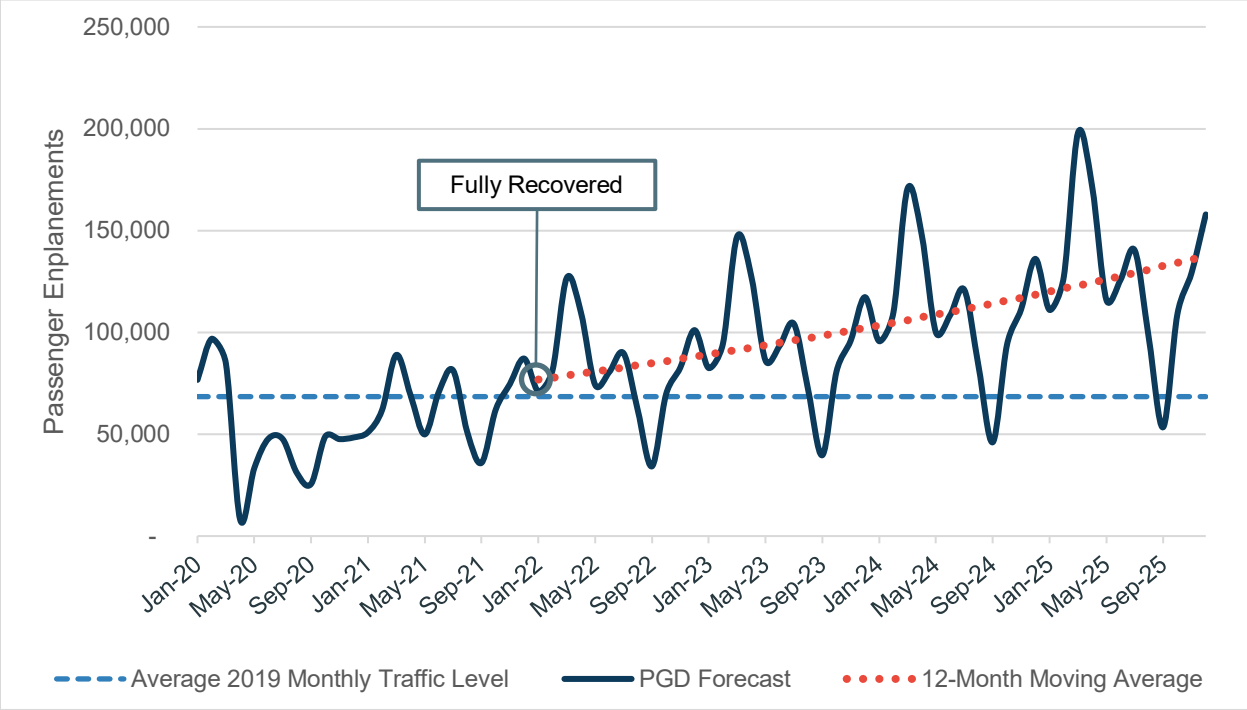
This subsection presents the forecasts for the three commercial service airports in District 1: Southwest Florida International Airport (RSW), Punta Gorda Airport (PGD), and Sarasota-Bradenton International Airport (SRQ).

Punta Gorda Airport (PGD)

Punta Gorda is a popular beach destination in southwest Florida that experiences significant changes in passenger traffic throughout the seasons. PGD receives its highest levels of traffic during the Spring Break period with a slower shoulder season in August and September.

Figure 3-1 presents the historic and forecasted number of monthly enplanements at PGD between 2020 and 2025, as well as the 12-month moving average of enplanement levels during this time period compared to the average monthly traffic level recorded at PGD in 2019. After the initial upset of the pandemic, passenger traffic at PGD grew 3.41 percent per month between July 2020 and December 2021. PGD was among the first airports to recover due to the leisure popularity of Punta Gorda, exceeding 2019 enplanement levels for the first time in June 2021. As of December 2021, passenger enplanements at PGD were 111 percent of December 2019 levels. PGD experienced steady growth in the years preceding the pandemic, and, as such, traffic growth is expected to continue to grow from December 2021 through remainder of the forecast period.

Figure 3-1: PGD Monthly Passenger Enplanements Forecast, 2020-2025



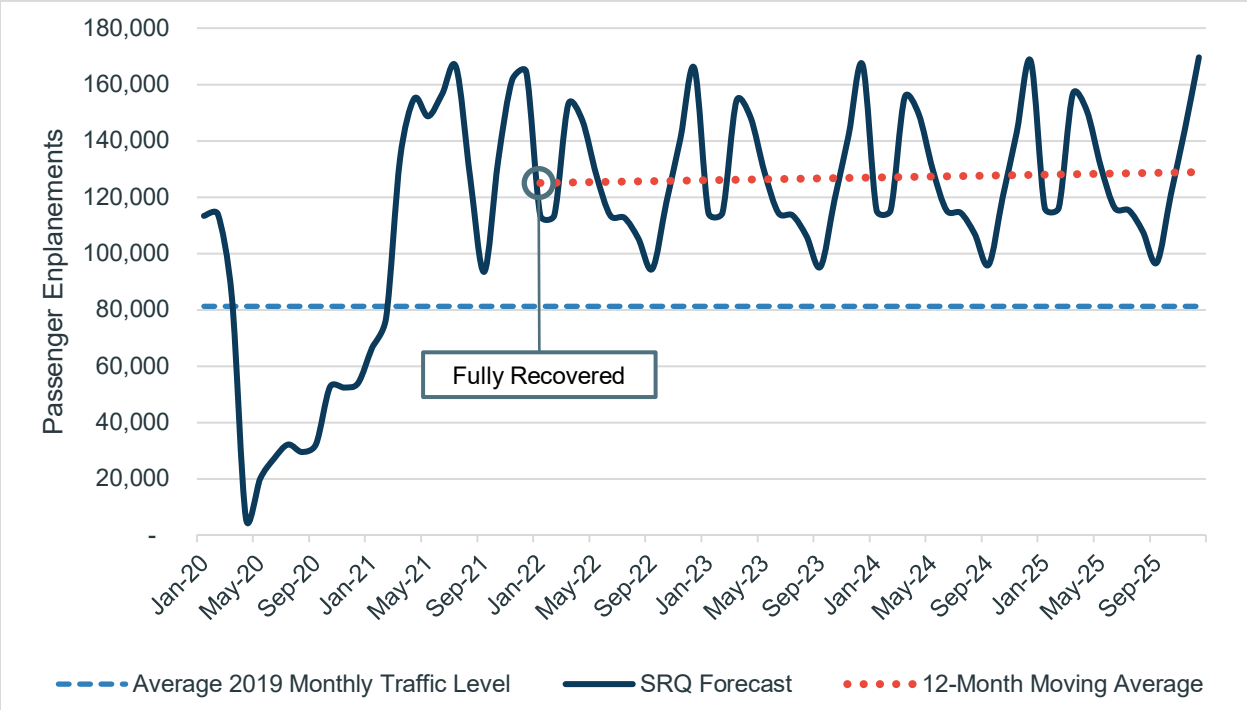
Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020); Kimley-Horn, 2022

Sarasota Bradenton International Airport (SRQ)

Similar to other District 1 airports, Sarasota Bradenton International Airport is a popular beach destination airport that sees significant changes in passenger traffic levels throughout the year, with particularly high traffic each spring. SRQ receives a large number of passengers traveling on ultra-low-cost carriers (ULCCs), which, as discussed in **Chapter 1,** have experienced rapid growth since the pandemic.

Due to the rapid rebound in leisure traffic in 2020, SRQ was the one of the fastest airports to recover to 2019 levels. Passenger traffic increased by 9.5 percent per month between July 2020 and December 2021, exceeding 2019 levels in February 2020. SRQ reported more than 200 percent growth from 2019 in June 2021 and set an annual traffic record in August 2021.[4] In the 20 years prior to the pandemic, traffic levels at SRQ had grown very little, and traffic growth is expected to plateau as pent-up demand subsides. **Figure 3-2** presents the historic and forecast traffic levels for SRQ between 2020 and 2025.

Figure 3-2: SRQ Monthly Passenger Enplanements Forecast, 2020-2025



Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2021; Kimley-Horn, 2022

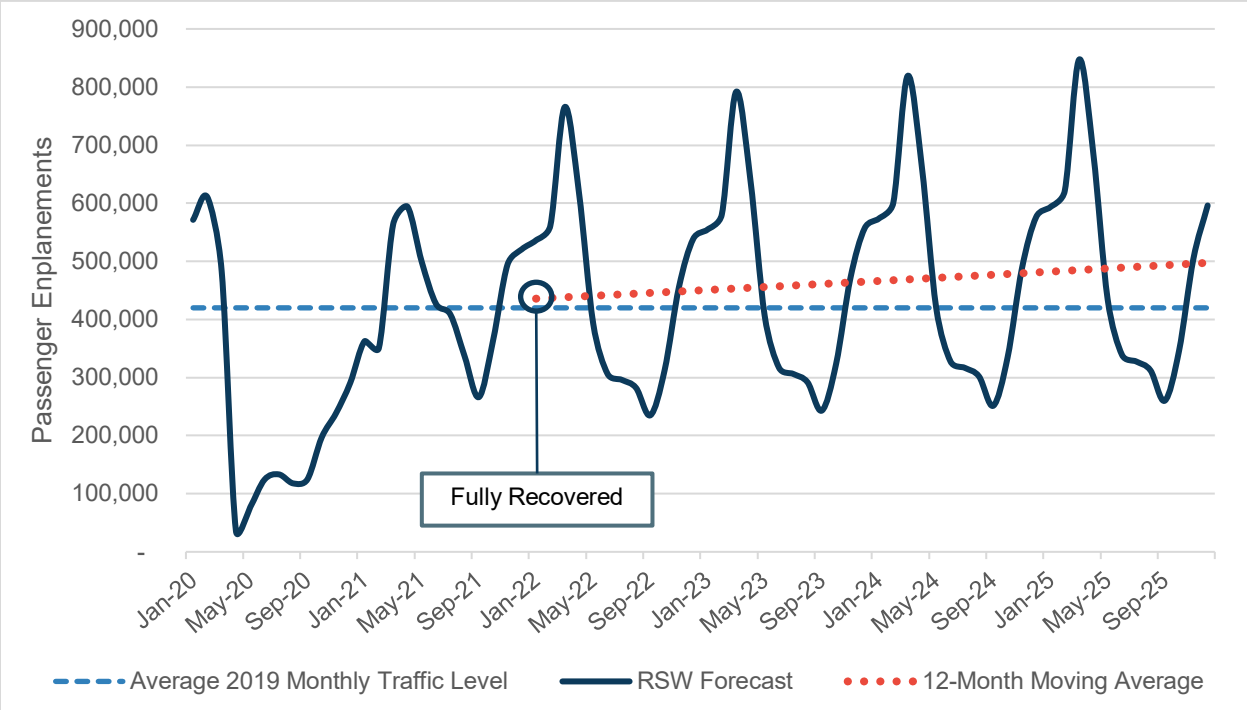
[4] Garwood, E. (2021) "SRQ breaks 12-month passenger record in eight months". Available online at: https://www.yourobserver.com/article/srq-breaks-12-month-passenger-record-in-eight-months. (Accessed September 2021)

Southwest Florida International Airport (RSW)

Southwest Florida International Airport is a popular leisure destination airport that experiences significant changes in passenger traffic throughout the seasons. RSW experiences most of its traffic in the springtime, as out-of-state visitors come to the region to vacation for spring break. The pandemic, which started impacting operations starting in March 2020, began impacting passenger traffic during the airport's peak season, creating a large decline relative to 2019 traffic levels.

Figure 3-3 presents the historic and projected number of monthly enplanements at RSW between 2020 and 2025, 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. Given the high levels of leisure traffic, RSW was the first medium hub airport to recover, first reaching 2019 levels in April 2021. After increasing to nearly 150 percent of 2019 levels in summer 2021, enplanement numbers returned to 103 percent of 2019 in December 2021. As RSW has already recovered, passenger traffic is expected to grow at a more modest rate (0.13 percent CMGR) through 2025.

Figure 3-3: RSW Monthly Passenger Enplanements Forecast, 2020-2025



Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2021; Kimley-Horn, 2022

3.4.1.2. District 2

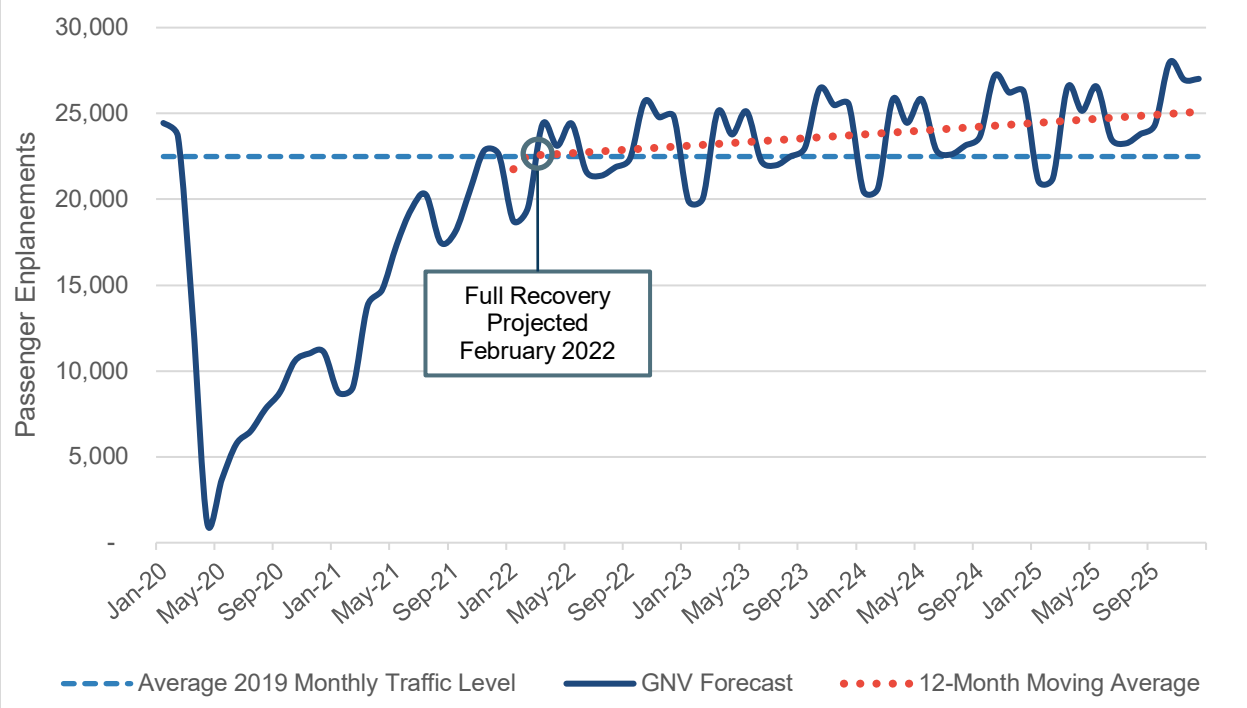
This subsection presents the forecast for the two commercial service airports in District 2: Gainesville Regional Airport (GNV) and Jacksonville International Airport (JAX).

Gainesville Regional Airport (GNV)

Gainesville is home to the University of Florida and several large businesses' headquarters, driving student and business traffic to the region. However, when compared to other areas in the state, Gainesville 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.

As shown in **Figure 3-4,** passenger enplanements have nearly returned to 2019 levels as of December 2021. However, GNV has recovered less quickly than many counterpart airports around the state due to the historic lack of leisure traffic arriving in Gainesville. Passenger enplanement levels have increased 7.16 percent per month between July 2020 and December 2021, reaching 93 percent of 2019 levels by the end of 2021. Traffic is projected to continue to grow and reach 2019 levels by February 2022. After that, traffic is expected to return to growth rates recorded at the airport from 2000-2019 as business travel slowly recovers.

Figure 3-4: GNV Monthly Passenger Enplanements Forecast, 2020-2025



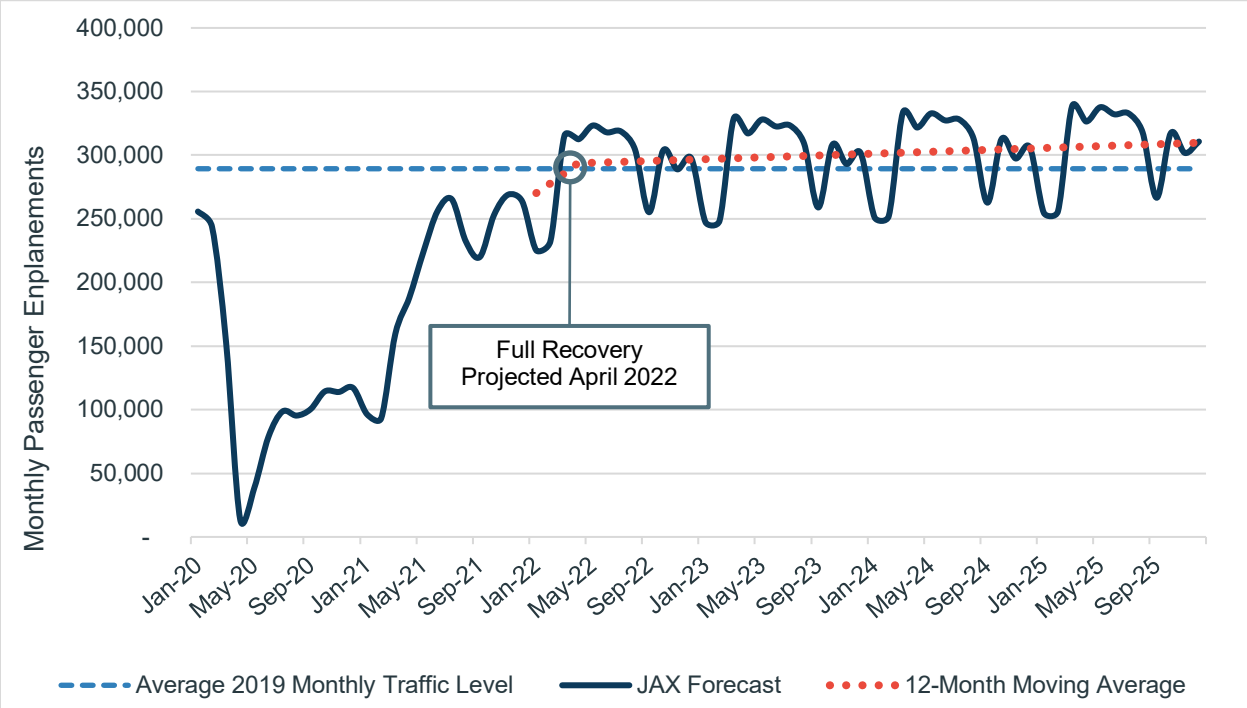
Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2021; Kimley-Horn, 2022

Jacksonville International Airport (JAX)

Jacksonville International Airport serves as the primary gateway for international and domestic airline passengers traveling to northeast Florida and southern Georgia. 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 benefited JAX as it received an initial boost in traffic in 2020 from returning leisure travelers. However, the airport's reliance on business and international travelers has hampered growth, delaying the recovery of passenger traffic at the airport. **Figure 3-5** presents the passenger enplanement forecast for JAX from 2020 and 2025. JAX recorded 5.62 percent monthly growth between July 2020 and December 2021, reaching 91 percent of 2019 levels by the end of 2021. JAX is expected to fully recover to 2019 levels in April 2021, then resume a historic 0.1 percent CMGR through 2025.

Figure 3-5: JAX Monthly Passenger Enplanements Forecast, 2020-2025



Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2021; Kimley-Horn, 2022

3.4.1.3. District 3

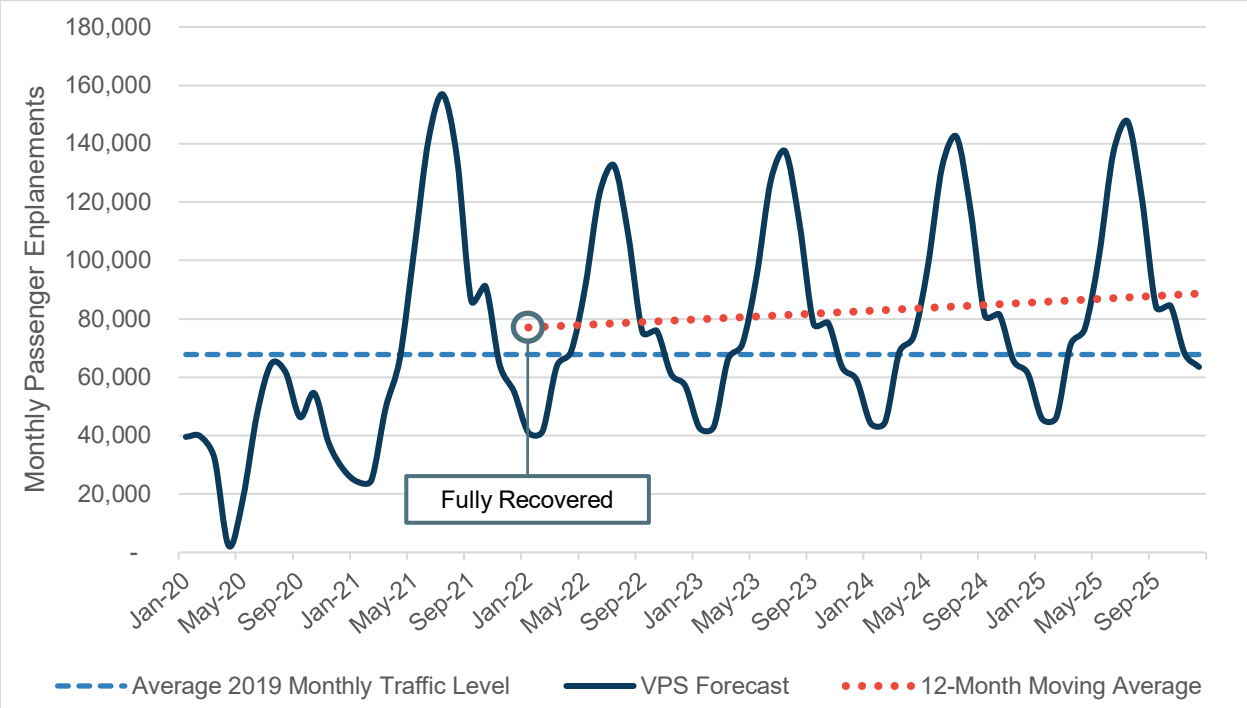
This subsection presents the forecast for the four commercial service airports in District 3: Destin-Fort Walton Beach Airport (VPS), Northwest Florida Beaches International Airport (ECP), Pensacola International Airport (PNS), and Tallahassee International Airport (TLH).

Destin-Fort Walton Beach International Airport (VPS)

Destin-Fort Walton Beach International Airport 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 and winter traffic levels.

Two summers removed from the start of the pandemic, VPS was among the busiest airports in the state due to the influx of leisure travelers visiting the many beaches in the region. Passenger traffic exceeded 2019 levels in March 2021. VPS set passenger traffic records in June and July 2021, reaching nearly 150 percent of 2019 levels during that period. However, traffic declined during the tourist off season in the fall and winter of 2021, dipping to 113 percent of 2019 levels in December 2021. Beginning in January 2022, traffic is expected to continue to grow steadily through the remainder of the forecast period, while still following the seasonal trends previously seen at the airport. **Figure 3-6** presents the monthly passenger enplanement forecast for VPS between 2020 and 2025.

Figure 3-6: VPS Monthly Passenger Enplanements Forecast, 2020-2025



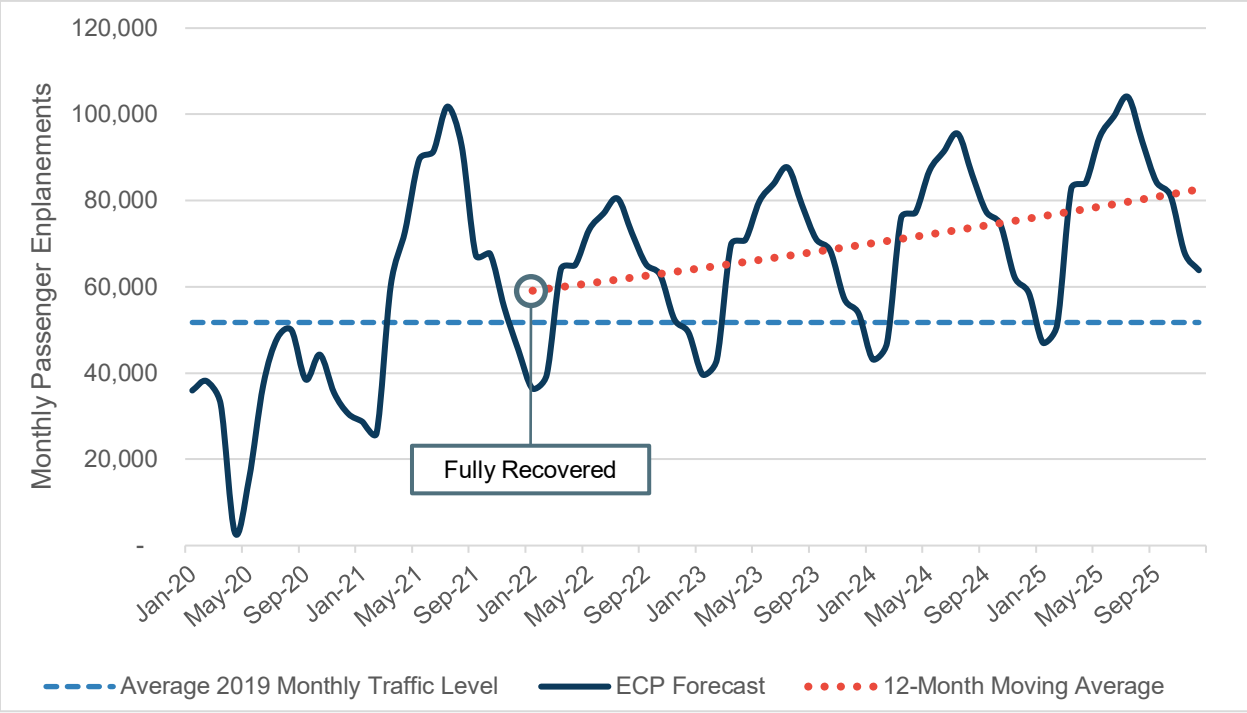
Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2021; Kimley-Horn, 2022

Northwest Florida Beaches International Airport (ECP)

Northwest Florida Beaches International Airport is a popular leisure airport that receives most of its passenger traffic from ULCCs. As such, passenger traffic varies dramatically between the peak summer travel season and the winter offseason.

Similar to the other beach airports in District 3, passenger traffic has grown rapidly due to the influx of leisure travelers to the region. **Figure 3-7** presents the historic and projected number of monthly enplanements at ECP between 2020 and 2025, as well as the 12-month moving average of enplanement levels during this time period compared to the average monthly traffic level recorded at ECP in 2019. Passenger traffic grew at an unparalleled pace in the first half of 2021, climbing past 2019 levels for the first time in March 2021. Traffic peaked in the summer around 150 percent of 2019 levels in July and August 2021, before declining in the fall shoulder season. However, passenger traffic in December 2021 still exceeded 2019 numbers. As such, enplanements are expected to follow 20-year historic trends for the remainder of the forecast period.

Figure 3-7: ECP Monthly Passenger Enplanements Forecast, 2020-2025



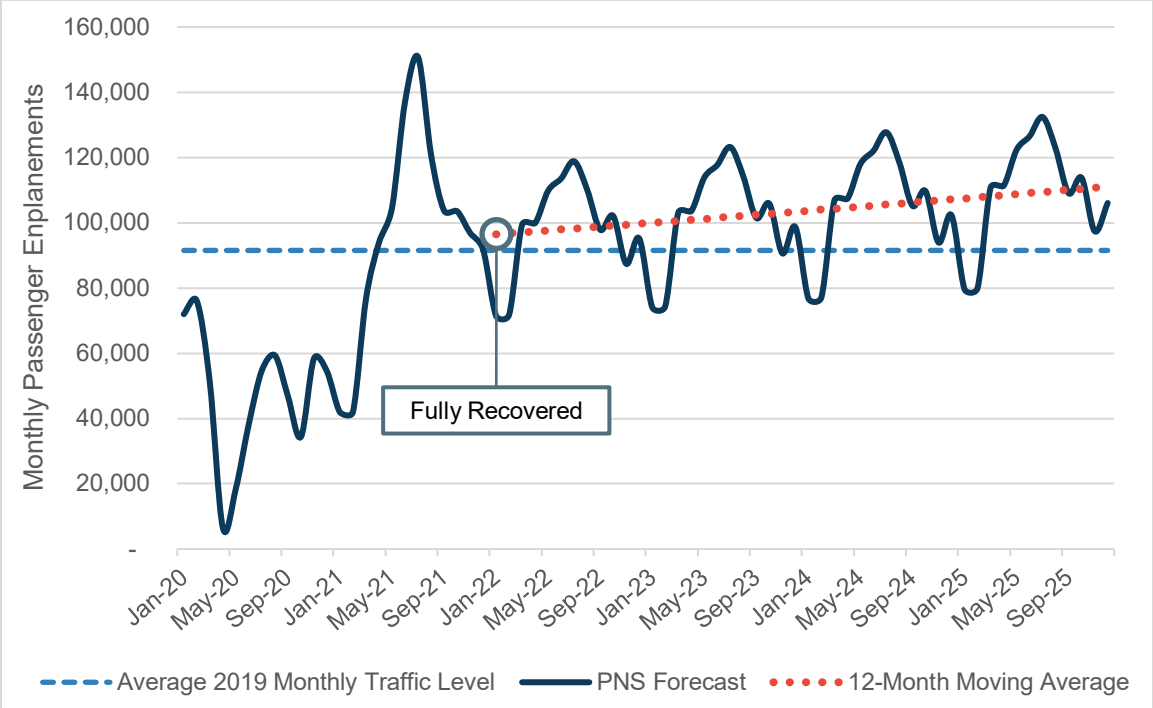
Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2021; Kimley-Horn, 2022

Pensacola International Airport (PNS)

Pensacola International is a leisure, business, and military destination in northwest Florida that receives a moderately diverse mix of passenger traffic. While there are variations in traffic levels throughout the year, the changes are much less pronounced than at other leisure airports.

Figure 3-8 presents the passenger traffic forecast at PNS from 2020 to 2025. As shown, the pandemic impacted the airport during its normal peak travel season, depressing traffic levels in 2020 and 2021. However, passenger traffic levels increased rapidly at the start of the airport's peak travel season in spring 2021. Traffic first exceeded 2019 levels in April 2021 and reached 105 percent of 2019 levels by December 2021. It is anticipated traffic will increase approximately 0.3 percent per month through the end of the forecast period at the same rate that was recorded at the airport prior to the pandemic.

Figure 3-8: PNS Monthly Passenger Enplanements Forecast, 2020-2025



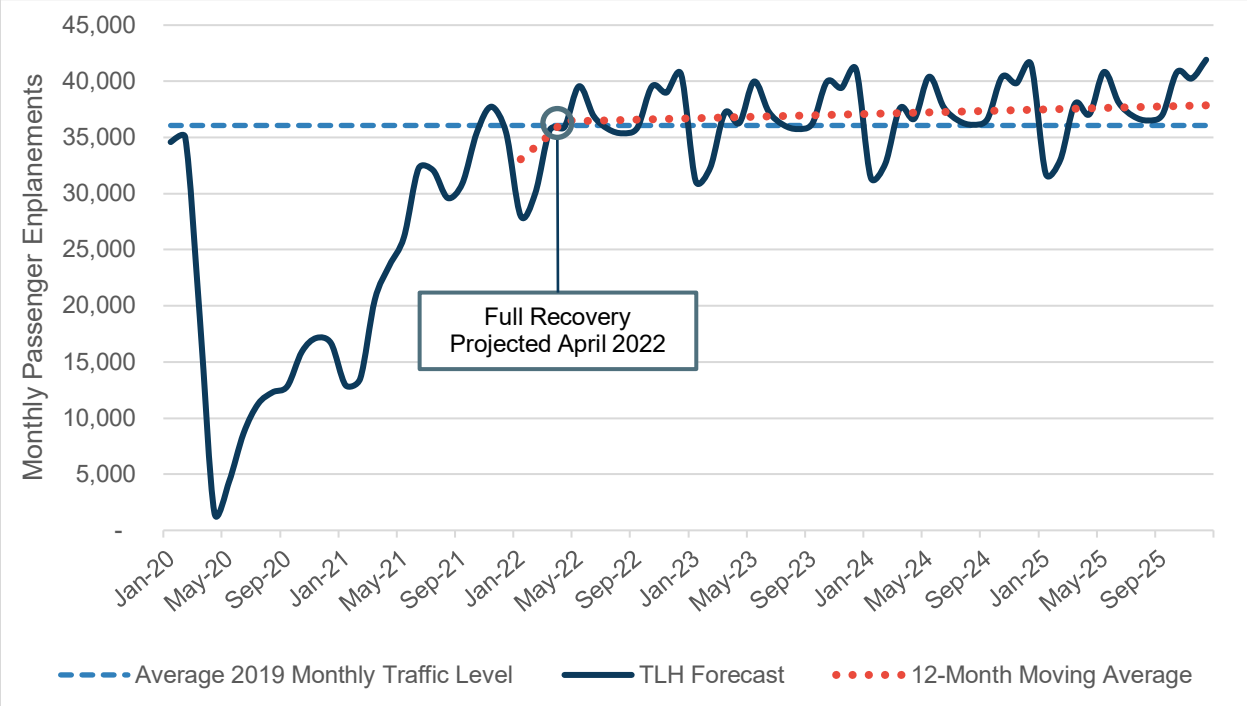
Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2021; Kimley-Horn, 2022

Tallahassee International Airport (TLH)

Tallahassee is the state capital and is not located near any major tourist destinations. As a result, TLH primarily receives passenger traffic from business and government travelers or individuals visiting one of three major universities and colleges in the area. Given this, enplanement levels remain relatively steady throughout the year.

The lack of leisure attractions in the area near Tallahassee caused TLH to recover more slowly than the other airports in the district. Traffic increased by approximately 6.5 percent per month between July 2020 and December 2021. However, TLH still had the lowest relative traffic level of any District 3 airport in December 2021, reaching 89 percent of 2019 levels. Traffic is expected to continue to grow steadily in the start of 2022 and is projected to fully recover in April 2022. In the previous 20 years, passenger traffic at TLH has grown very little, and it is expected this trend will resume once recovery is achieved. **Figure 3-9** presents the Fall 2020 Study's historic and forecast number of monthly enplanements at TLH between 2020 and 2025, as well as the 12-month moving average of enplanement levels during this time period compared to the average monthly traffic level recorded at TLH in 2019.

Figure 3-9: TLH Monthly Passenger Enplanements Forecast, 2020-2025



Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2021; Kimley-Horn, 2022

3.4.1.4. District 4

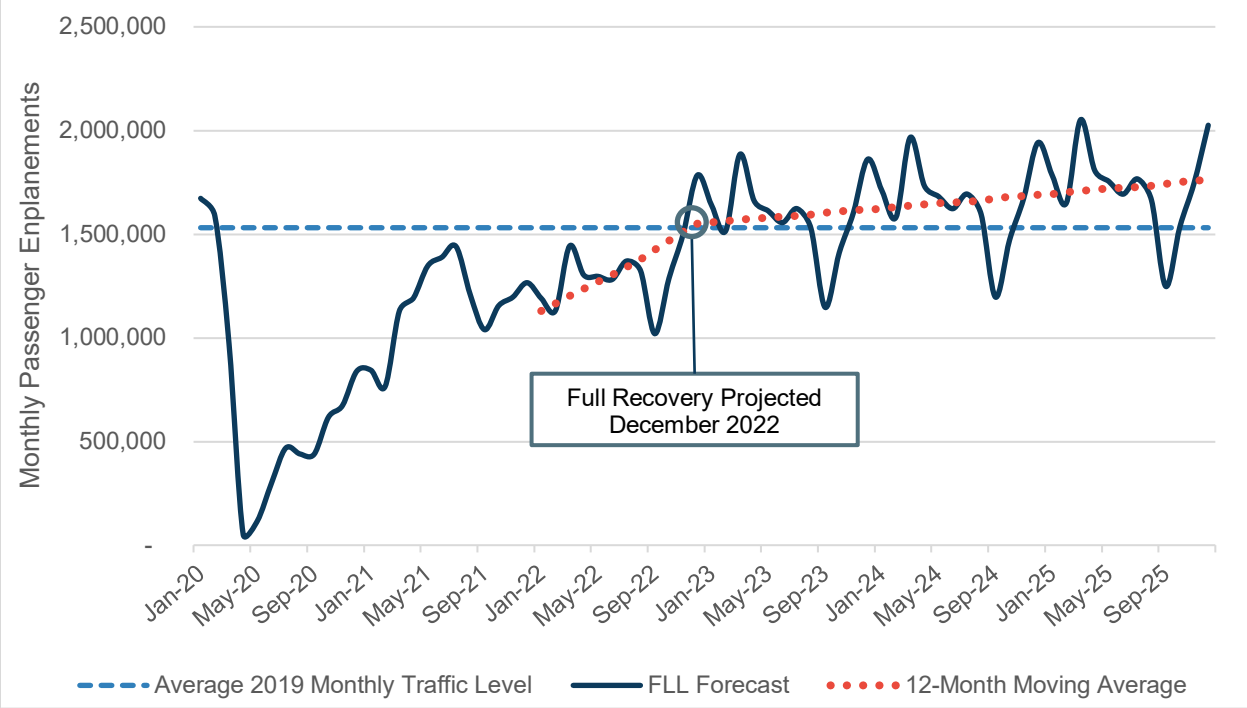
This subsection presents the forecast for the three commercial service airports in District 4: Fort Lauderdale/Hollywood International Airport (FLL), Palm Beach International Airport (PBI), and Vero Beach Regional Airport (VRB).

Fort Lauderdale/Hollywood International Airport (FLL)

Fort Lauderdale/Hollywood International Airport is one of two large hub airports in South Florida, located just 20 miles north of Miami International Airport (MIA). FLL serves the majority of domestic passenger traffic of the two airports, with approximately 76 percent of passenger traffic at FLL being attributed to domestic travel. However, FLL still served the second most international enplanements of any airport in the state.

While both international and domestic passenger numbers have grown steadily in the previous 18 months, FLL still has the lowest total passenger traffic level of any large hub airport. Domestic traffic at FLL has recovered more quickly than international, as monthly domestic enplanements exceeded 2019 levels during the summer travel season. International traffic still continues to struggle, resulting in the overall traffic level at FLL reaching only 74 percent of 2019 by December 2021. Strong growth in the domestic market is expected to continue and offset depressed international traffic. Total passenger traffic is forecast to return to 2019 levels by December 2022, then grow by approximately 0.35 percent per month through the end of the forecast period. **Figure 3-10** presents the historic record of passenger traffic and the forecast at FLL from 2020 to 2025.

Figure 3-10: FLL Monthly Passenger Enplanements Forecast, 2020-2025



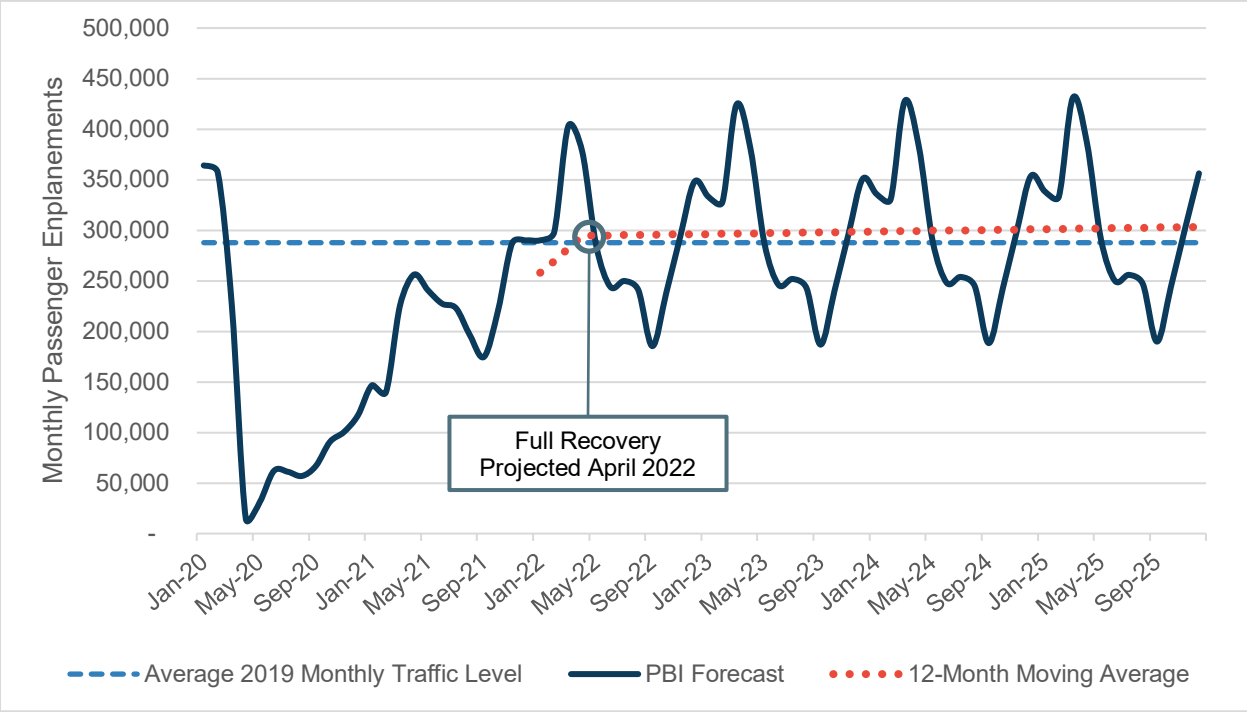
Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2021; Kimley-Horn, 2022

Palm Beach International Airport (PBI)

Palm Beach International Airport is another popular beach destination along Florida's central Atlantic coast. As it serves mostly leisure traffic, PBI receives higher traffic levels in the peak spring break season and fewer passengers in the late summer and fall.

Figure 3-11 presents the updated passenger traffic forecast at PBI from 2020 to 2025. Passenger traffic at PBI grew steadily between July 2020 and May 2021. However, traffic declined at the end of the peak season in summer 2021 resulting in passenger enplanement levels being lower than what was recorded in 2019. Passenger traffic at PBI is forecast to increase by approximately 4.5 percent per month until it reaches 2019 levels in April 2022. At this time, it is anticipated that growth will slow due to the stable traffic levels reported at the airport prior to the pandemic. Traffic is expected to grow slightly through the remainder of the forecast period, reaching 105 percent of 2019 levels by December 2025.

Figure 3-11: PBI Monthly Passenger Enplanements Forecast, 2020-2025



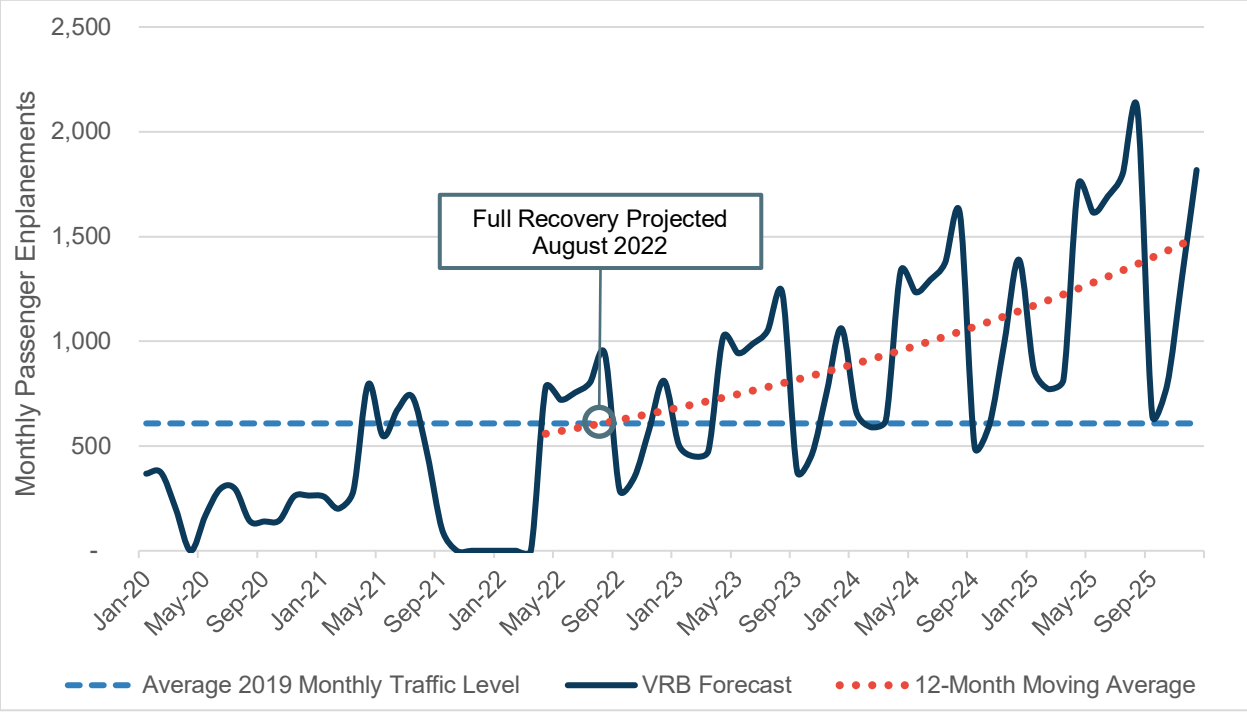
Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2021; Kimley-Horn, 2022

Vero Beach Regional Airport (VRB)

Vero Beach Regional Airport 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 YoY changes in traffic levels, making it difficult to accurately project traffic levels for any specific month. Additionally, VRB closed its primary runway for rehabilitation in August 2021, forcing the existing airline service to relocate operations to Orlando-Melbourne International (MLB). The runway is scheduled be completed and airline operations restarted in March 2022. This forecast assumes that passenger airline service will resume at VRB with no changes to flight schedules or available seats and that passenger traffic will return at roughly the same levels.

Figure 3-12 presents the updated passenger traffic forecast at VRB from 2020 to 2025. Passenger traffic increased by approximately seven percent between July 2020 and July 2021 before airline service was suspended. Once airline traffic resumes, it is anticipated that traffic will grow at this rate until recovery is achieved in August 2022. Traffic is then expected to grow by approximately 2.3 percent per month through the remainder of the forecast period. However, due to the low number of passenger enplanements that occur at VRB, small variations in future passenger enplanements may have a significant impact on traffic levels in comparison to 2019.

Figure 3-12: VRB Monthly Passenger Enplanements Forecast, 2020-2025



Note: Passenger Airline Service Suspended at VRB October 2021-March 2022 due to runway construction
Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2021; Kimley-Horn, 2022

3.4.1.5. District 5

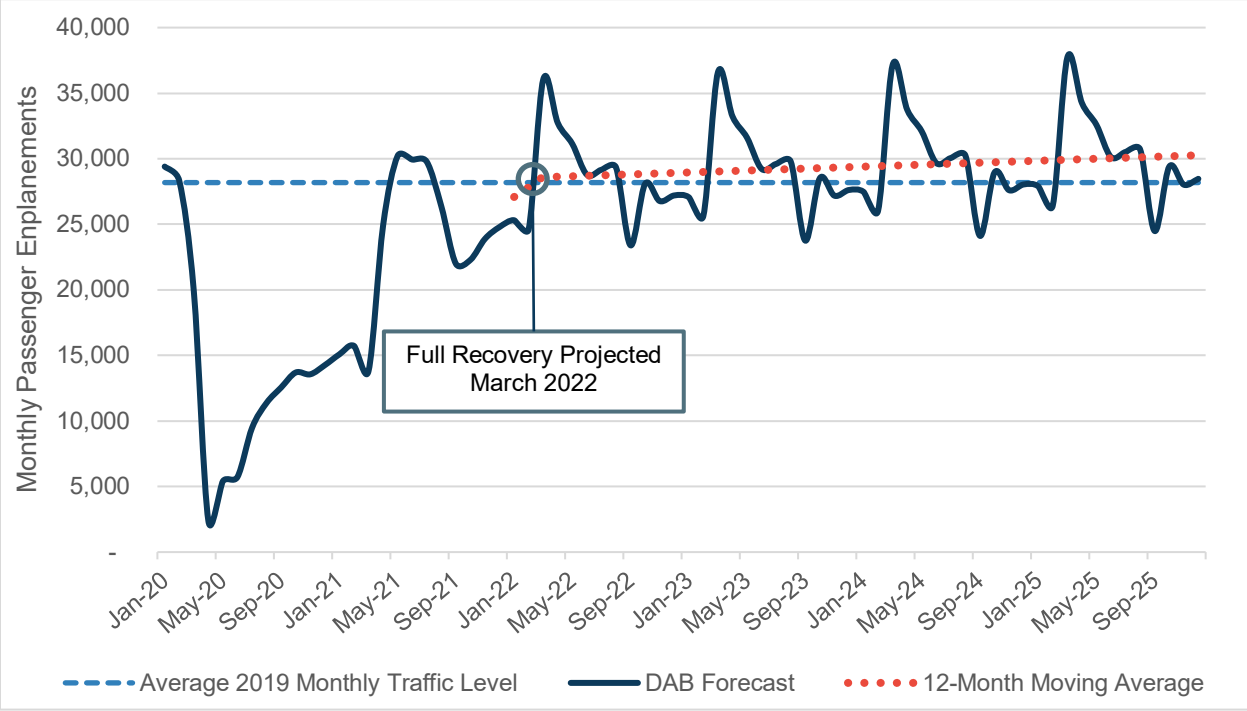
This subsection presents the forecast for the four commercial service airports in District 5: Daytona Beach International Airport (DAB), Melbourne International Airport (MLB), Orlando International Airport (MCO), and Orlando Sanford International Airport (SFB).

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.

Strong recovery in leisure traffic helped DAB rebound to 100 percent of 2019 levels in summer 2021 before declining slightly in the fall. As of December 2021, passenger enplanements at DAB were 94 percent of 2019 levels. It is anticipated these levels will grow rapidly in 2022 and the airport is expected to recover to 2019 levels in March 2022. Traffic may continue to grow rapidly during the spring season, but it is forecast this growth will slow as the peak season ends. **Figure 3-13** presents the actual and projected number of monthly enplanements at DAB between 2020 and 2025, as well as the 12-month moving average of enplanement levels during this time period compared to the average monthly traffic level recorded at DAB in 2019.

Figure 3-13: DAB Monthly Passenger Enplanements Forecast, 2020-2025



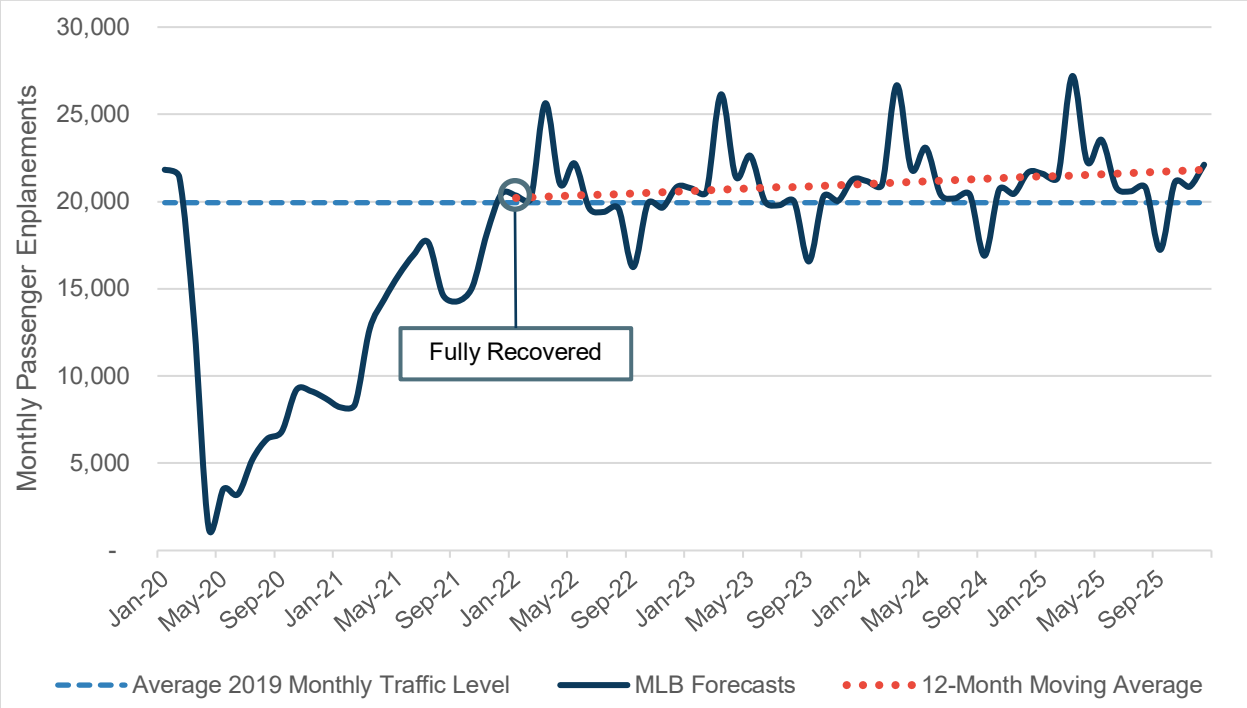
Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2021; Kimley-Horn, 2022

Melbourne International Airport (MLB)

Melbourne International Airport is another popular beach and tourist destination airport in central Florida that is served almost exclusively by regional airlines and ULCCs. As such, traffic is mostly comprised of leisure travelers and passenger counts vary considerably between months.

Figure 3-14 presents the Fall 2020 Study's projected number of monthly enplanements at MLB between 2020 and 2025, as well as the 12-month moving average of enplanement levels during this time period compared to the average monthly traffic level recorded at MLB in 2019. Traffic increased by approximately 7.6 percent per month from July 2020 and exceeded 2019 levels for the first time in December 2021. As the airport has returned to 2019 levels, it is anticipated that growth will begin to plateau at a rate similar to what was recorded in the years prior to the pandemic.

Figure 3-14: MLB Monthly Passenger Enplanements Forecast, 2020-2025



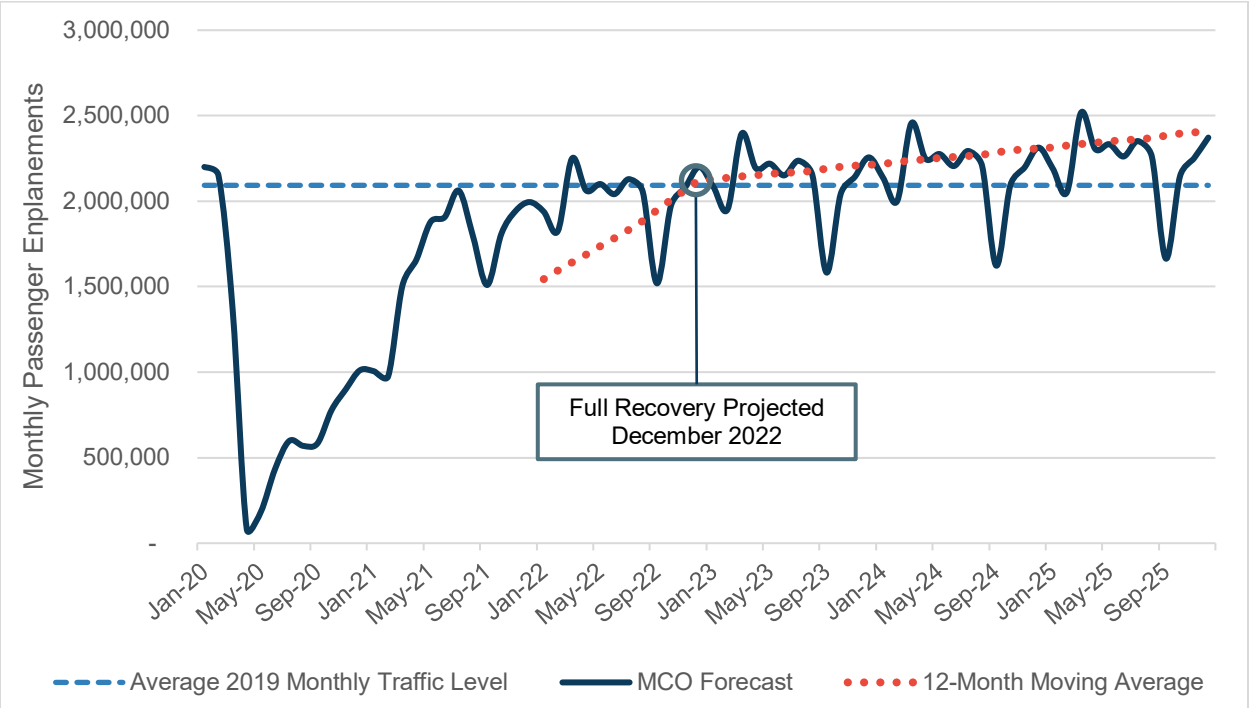
Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2021; Kimley-Horn, 2022

Orlando International Airport (MCO)

Orlando International Airport is the busiest airport in the state in terms of passenger enplanements. MCO 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. While airlines provide service from MCO to both domestic and international destinations, more than 85 percent of all passengers travel to and from MCO on domestic flights.

The rapid recovery of leisure travel in summer 2021 allowed domestic enplanement levels to rebound quickly at MCO, as domestic traffic exceeded 2019 levels several time throughout the year. Domestic traffic is expected to fully recover by May 2022. However, international passenger traffic has struggled, only reaching 56 percent of 2019 levels by December 2021. Future traffic growth is forecast to be hampered by slow international recovery, delaying overall passenger traffic recovery to 2019 levels until December 2022. International traffic is not expected to fully return to 2019 levels until late 2023 due to the ongoing restrictions. **Figure 3-15** presents the actual and projected number of monthly enplanements at MCO between 2020 and 2025.

Figure 3-15: MCO Monthly Passenger Enplanements Forecast, 2020-2025



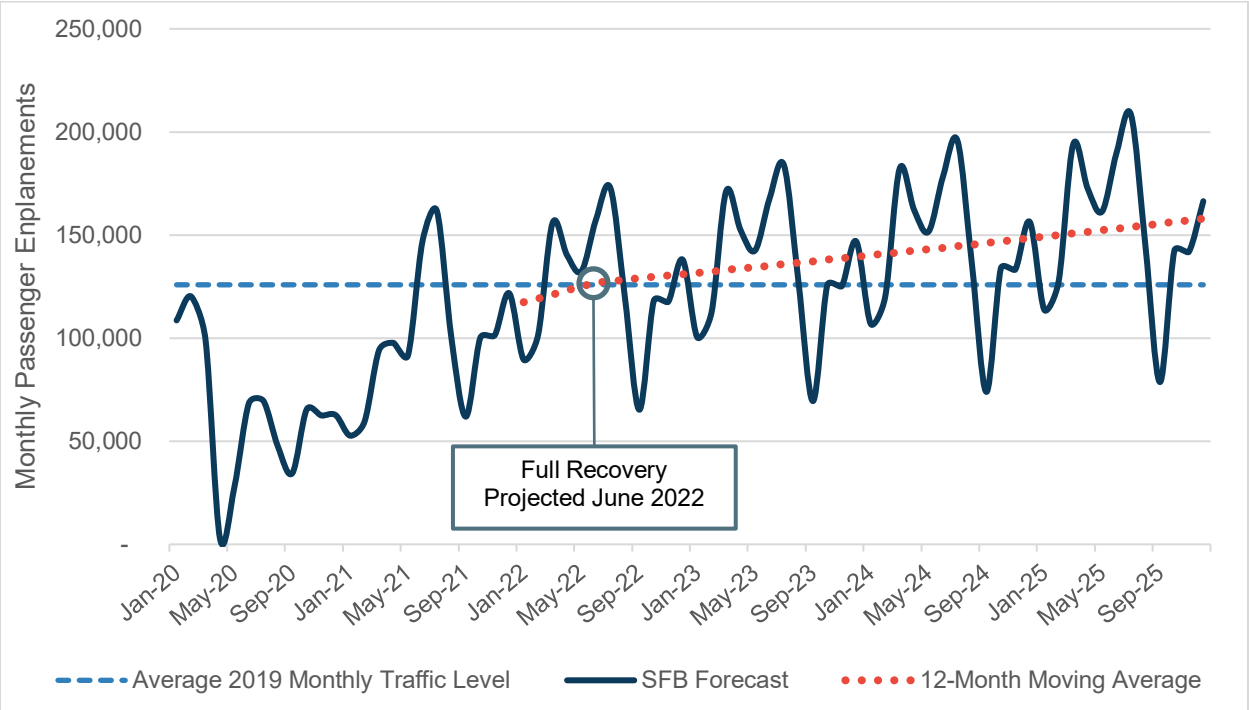
Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2021; Kimley-Horn, 2022

Orlando Sanford International Airport (SFB)

Orlando Sanford International Airport is a secondary commercial airport for the Orlando metropolitan area, primarily serving ULCCs that bring leisure travelers to the region. As such, SFB experiences wide variations in passenger traffic throughout the year, as more passengers travel through the airport in the spring and summer than in the winter months. SFB also has considerably fewer international travelers than MCO but does have service to several international destinations.

Figure 3-16 presents the historic record and forecast of passenger traffic at SFB from 2020 to 2025. Passenger traffic grew 3.2 percent per month between July 2020 and December 2021, but traffic levels at SFB trailed most other small hub airports in the state. As of December 2021, passenger enplanements were 92 percent of 2019 levels, while all other small hub airports had recovered to 2019 levels. It is possible SFB recovered slower as it is the secondary airport for the Orlando Metropolitan area and did not experience as much 'pent-up' demand as other primary airports. Beginning in January 2021, traffic is forecast to grow 1.6 percent per month until June 2022 when traffic is projected to achieve 2019 levels. After the summer travel season, traffic is anticipated to revert to a lower growth rate reflective of pre-pandemic passenger trends.

Figure 3-16: SFB Monthly Passenger Enplanements Forecast, 2020-2025



Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2021; Kimley-Horn, 2022

3.4.1.6. District 6

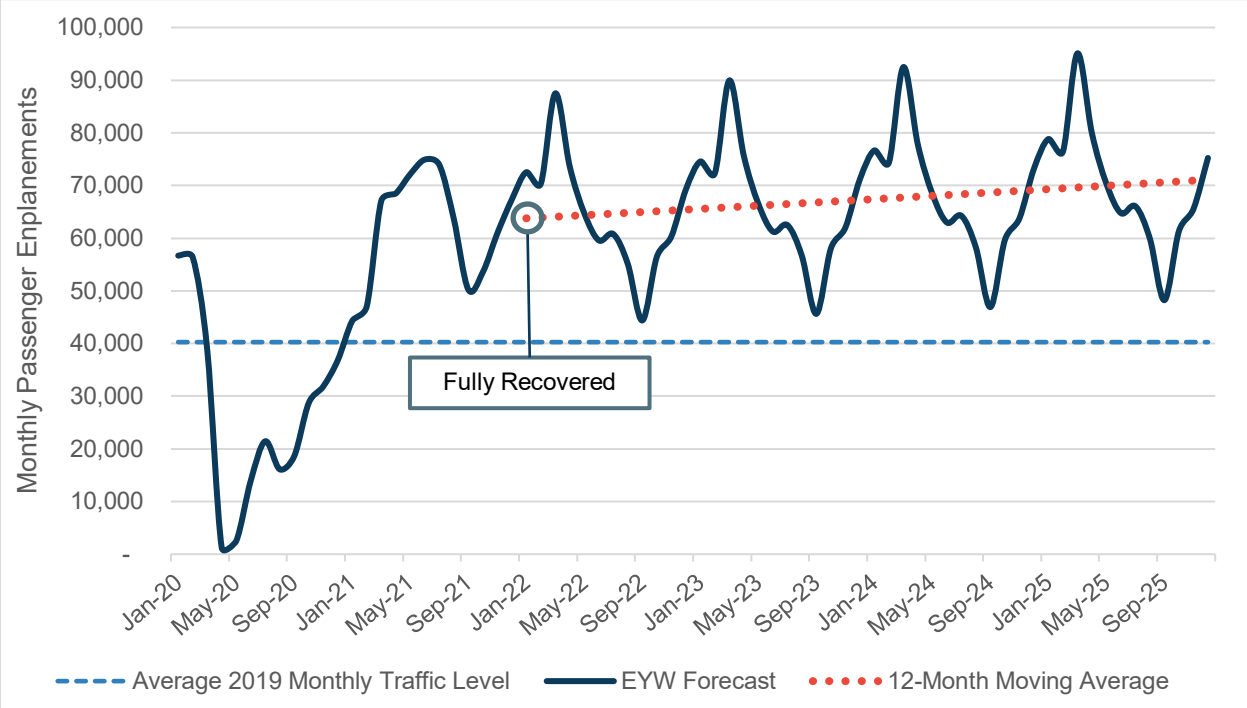
This subsection presents the forecast for the two commercial service airports in District 6: Key West International Airport (EYW) and Miami International Airport (MIA).

Key West International Airport (EYW)

Key West International Airport is a popular beach destination airport that provides exclusive airline access to leisure destinations in the Florida Keys. As a result, passenger traffic levels are much higher in the spring and early summer than in the fall and winter.

Figure 3-17 presents the passenger traffic forecast at EYW from 2020 to 2025 as well as the 12-month moving average of enplanement levels during this time period compared to the average monthly traffic level recorded at EYW in 2019. Although EYW was one of the most severely impacted airports in the state, traffic at the airport has grown faster than nearly every other airport in the state. Passenger traffic at EYW has increased by 6.6 percent per month between July 2020 and December 2021. Monthly passenger traffic first exceeded 2019 levels in February of 2021 and was the earliest of any airport in the state to recover. As of December 2021, traffic levels were one-and-a-half times greater than what was recorded in December 2019. While this growth has been impressive, it is projected to plateau in 2022 as other markets recover and recapture previously held passenger traffic.

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



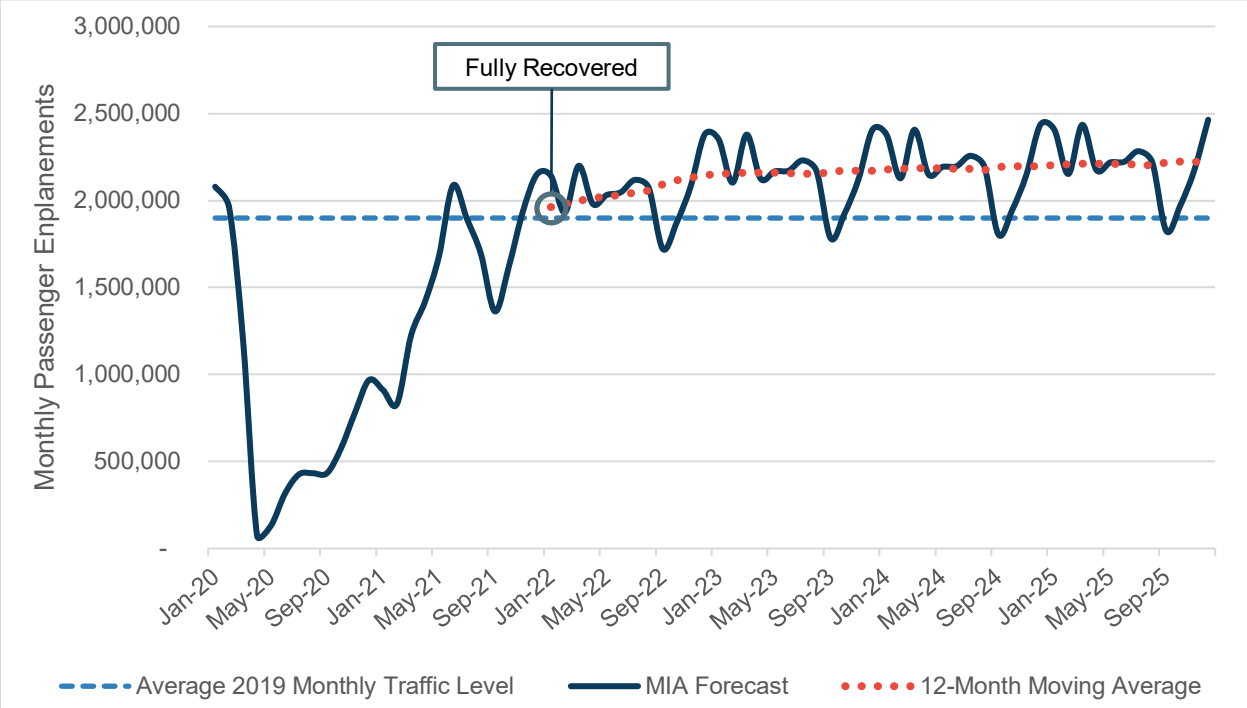
Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2021; Kimley-Horn, 2022

Miami International Airport (MIA)

Miami International Airport is the busiest airport in Florida for international airline traffic, serving nearly three times as many international passengers as the next busiest airport. MIA receives a wide variety of passenger traffic from around the globe. This diverse traffic mix means that MIA experiences relatively consistent traffic levels year-round.

Although it was thought that MIA would be slow to recover due to the high portion of international traffic at the airport, MIA recovered more rapidly than any other large hub airport. Domestic passenger traffic exceeded 2019 levels in April 2021 while total passenger traffic reached 2019 levels in November 2021. International traffic at MIA was approximately 80 percent of 2019 in December 2021, the highest of any large hub airport at that time. The rapid recovery of international traffic may be attributed to MIA's position as the primary international gateway to Florida and many parts of the Caribbean and Latin America. As mentioned in **Chapter 1,** the Latin America/Caribbean market has been among the fastest regions to recover, enabling MIA to also recover quickly. International traffic is forecast to grow 1.6 percent per month in 2022 before fully recovering in December 2022. At this point, both domestic and international traffic is projected to grow 0.1 percent through the forecast period. **Figure 3-18** presents the total passenger traffic forecast at MIA from 2020 to 2025.

Figure 3-18: MIA Monthly Passenger Enplanements Forecast, 2020-2025



Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2021; Kimley-Horn, 2022

3.4.1.7. District 7

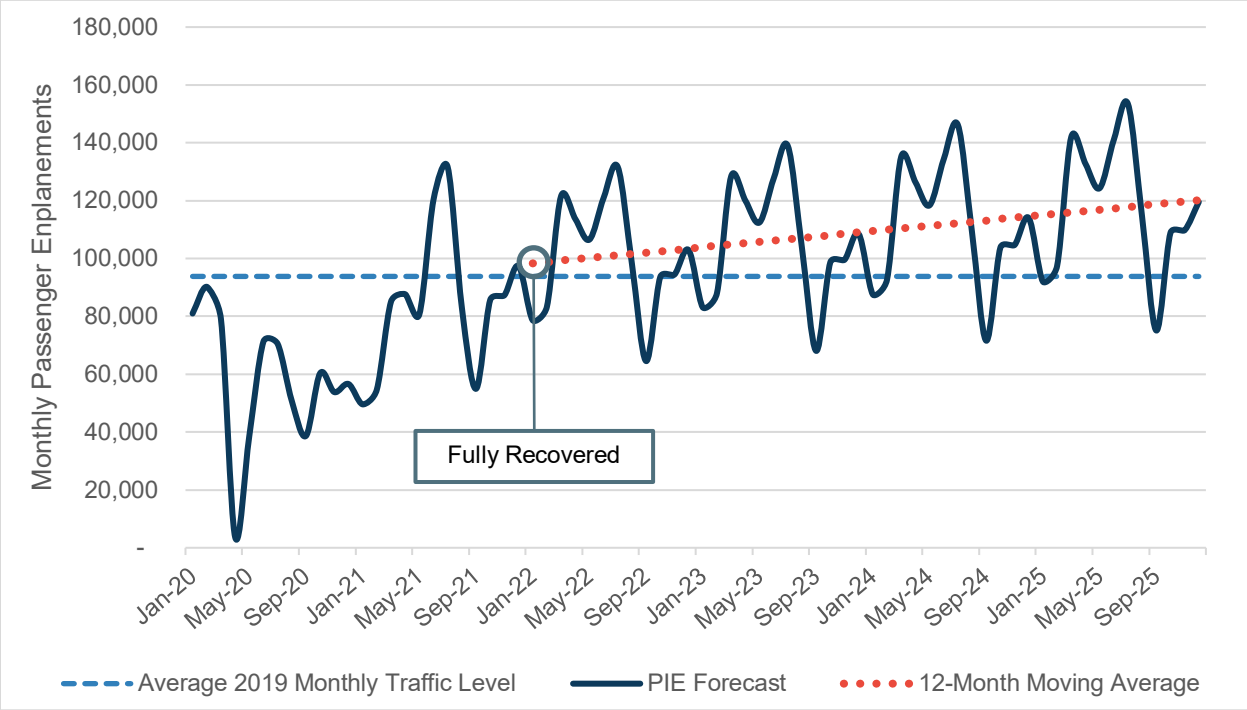
This subsection presents the forecast for the two commercial service airports in District 7: St. Pete-Clearwater International Airport (PIE) and Tampa International Airport (TPA).

St. Pete-Clearwater International Airport (PIE)

St. Pete-Clearwater International Airport primarily supports St. Petersburg and Clearwater, which are primarily domestic tourist and beach destinations for west central Florida. PIE does not experience as much traffic as the large hub airport located within the District (TPA) and is almost exclusively served by ULCCs. PIE primarily receives leisure traffic and experiences large fluctuations in passenger traffic levels between seasons, with most visitors coming in the spring and summer.

PIE was initially projected to recover rapidly when compared with other commercial service airports due to its large number of domestic leisure travelers. **Figure 3-19** .depicts the historic and forecast number of monthly enplanements at PIE between 2020 and 2025, as well as the 12-month moving average of enplanement levels during this time period compared to the average monthly traffic level recorded at PIE in 2019. As shown, traffic fluctuated between July and December 2020 before growing rapidly in the first half of 2021. Passenger traffic at PIE first exceeded 2019 levels in June 2021 and was four percent higher in December 2021 than the same month of 2019. As the airport has recovered, it is projected that passenger traffic will increase by half a percent per month, which is the same average recorded at the airport in the years preceding the pandemic.

Figure 3-19: PIE Monthly Passenger Enplanements Forecast, 2020-2025



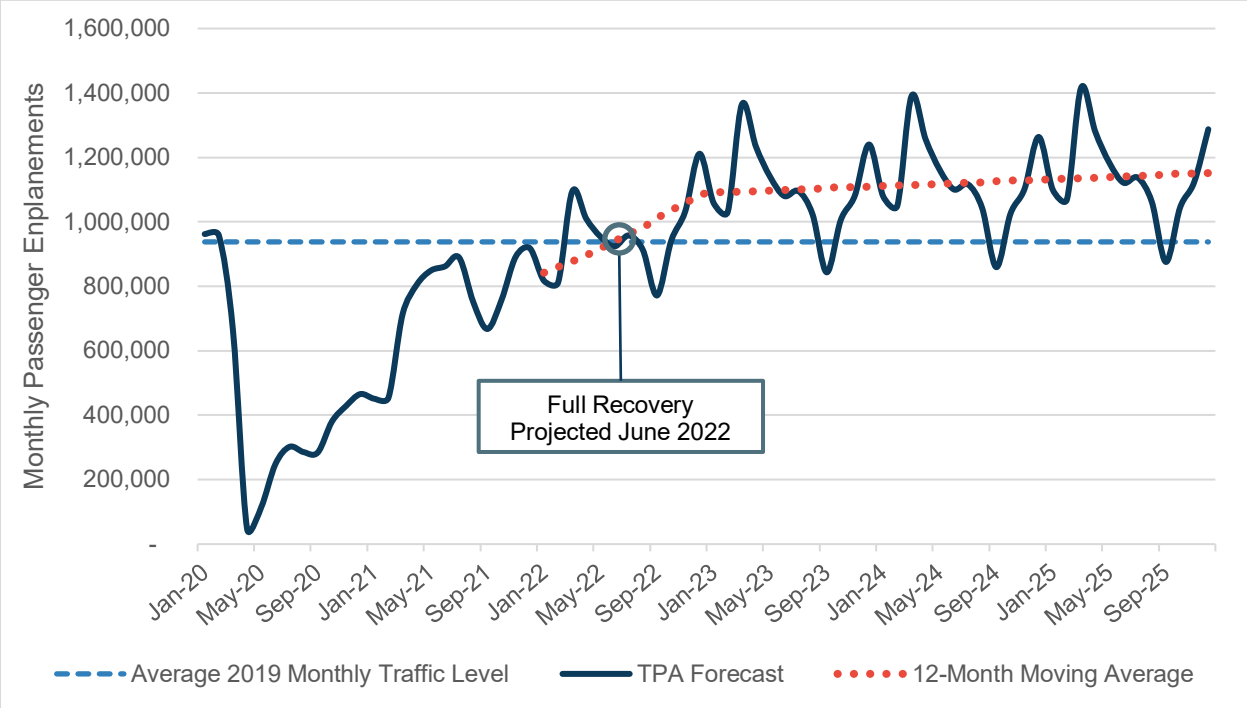
Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2021; Kimley-Horn, 2022

Tampa International Airport (TPA)

Tampa International Airport is the smallest of the state's four large hub airports in terms of annual passenger traffic. However, TPA still receives a significant number of international leisure and business visitors when compared to other commercial service airports in the state. Due to the variety of traffic at the airport, TPA experiences relatively steady traffic levels throughout the year.

TPA saw the most significant changes in international passenger traffic of any large hub airport considering that international passenger traffic was almost entirely suspended. TPA reported less than 100 international enplanements between April and September 2020, compared to more than 292,000 during the same period of 2019. Since that time, TPA has experienced steady growth in international passenger traffic, but the airport still received less than a quarter of 2019 international enplanements in December 2021. The lack of international traffic has depressed overall traffic levels at TPA; however, international passengers represent a small enough portion of TPA's total traffic that overall passenger enplanement levels are comparable to other large hub airports. Domestic traffic levels are forecast to return to 2019 levels in May 2022 with overall passenger enplanements achieving 2019 levels the following month. International passenger traffic is not expected to fully recover until June 2023. After this time, previously recorded traffic trends are expected to resume and total passenger traffic is forecast to grow by 0.2 percent per month through the forecast period. **Figure 3-20** presents the total passenger traffic forecast at TPA from 2020 to 2025 and the 12-month moving average of enplanement levels during this time period compared to the average monthly traffic level recorded at TPA in 2019.

Figure 3-20: TPA Monthly Passenger Enplanements Forecast, 2020-2025

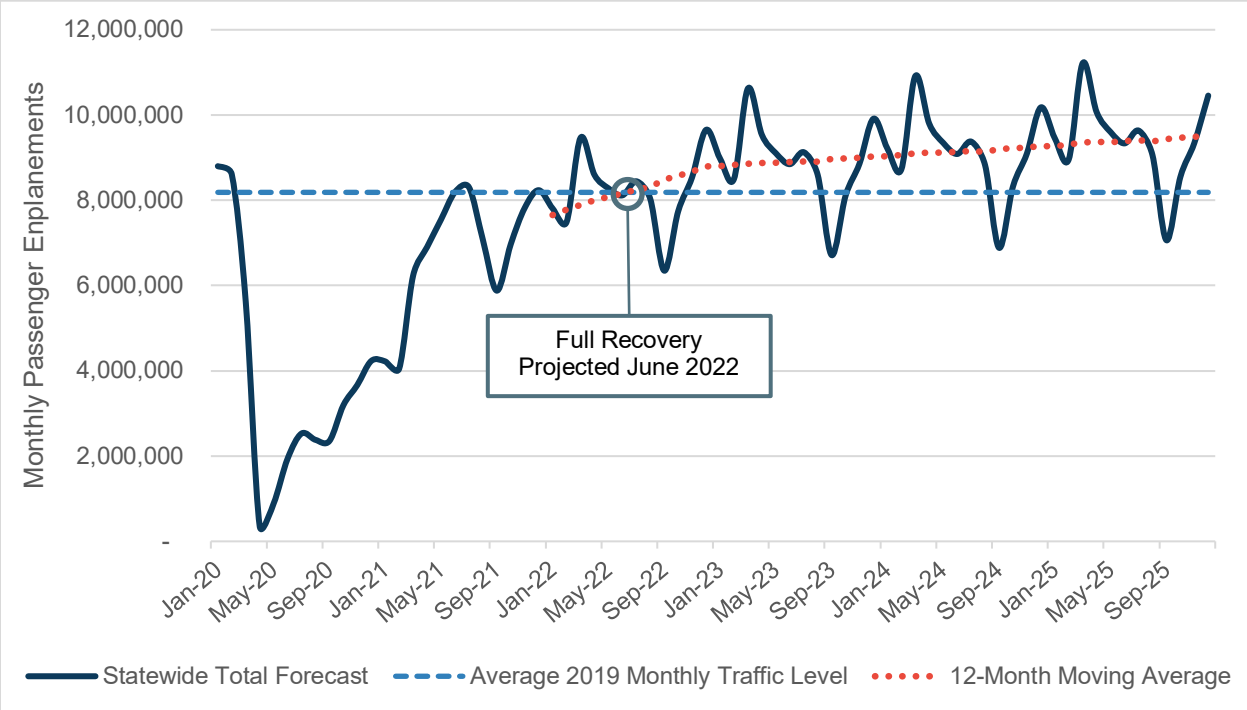


Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2021; Kimley-Horn, 2022

3.4.2. Statewide Recovery Forecasts

Figure 3-21 presents the forecast of passenger traffic for Florida's entire commercial service airport system. While some airports have yet to reach 2019 levels, the total number of passenger enplanements recorded in the state exceeded 2019 levels for the first time in June 2021 and have remained very close to 2019 levels since then. It is expected that total statewide passenger traffic will exceed 2019 levels again in June 2022 during the summer travel season. Statewide passenger traffic is expected to grow 1.2 percent per month in 2022 and 0.2 percent per month from the start of January 2023 through December 2025. If traffic increases at the projected rate, it is likely that many airports in the state will not only exceed 2019 traffic levels but will also break all-time traffic records during the forecast period.

Figure 3-21: Statewide Monthly Passenger Enplanements Forecast, 2020-2025



Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2021; Kimley-Horn, 2022

3.4.3. 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 actual 2019, 2020, and 2021 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 3.4.1**. 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 by Airport, 2020-2025

Associated City	Airport Name	FAA ID	Annual Passenger Enplanements						
			Actual			Forecast			
			2019	2020	2021	2022	2023	2024	2025
District 1									
Fort Myers	Southwest Florida International	RSW	5,039,408	3,004,387	5,188,170	5,301,229	5,483,660	5,672,369	5,867,572
Punta Gorda	Punta Gorda	PGD	821,528	596,715	783,846	983,308	1,140,873	1,323,686	1,535,793
Sarasota/Bradenton	Sarasota/Bradenton International	SRQ	974,399	616,798	1,583,236	1,505,584	1,517,265	1,529,036	1,540,898
District 2									
Gainesville	Gainesville Regional	GNV	269,887	127,772	204,842	272,691	281,125	289,156	297,417
Jacksonville	Jacksonville International	JAX	3,472,151	1,422,549	2,521,053	3,495,117	3,586,624	3,639,150	3,692,446
District 3									
Destin/Fort Walton Beach	Destin-Fort Walton Beach	VPS	813,314	473,579	998,097	940,583	974,895	1,010,458	1,047,318
Panama City	Northwest Florida Beaches International	ECP	620,845	409,272	798,828	738,261	804,166	875,954	954,151
Pensacola	Pensacola International	PNS	1,098,227	570,604	1,163,553	1,177,329	1,220,567	1,265,394	1,311,866
Tallahassee	Tallahassee International	TLH	432,755	189,184	330,111	432,209	442,723	447,425	452,177
District 4									
Fort Lauderdale	Fort Lauderdale/Hollywood International	FLL	17,942,566	8,242,049	13,970,682	15,930,639	19,046,993	19,869,431	20,727,382
Vero Beach	Vero Beach Regional	VRB	7,295	2,650	4,058	6,030	9,323	12,200	15,963
West Palm Beach	Palm Beach International	PBI	3,452,636	1,548,473	2,628,115	3,454,131	3,567,956	3,596,535	3,625,342
District 5									
Daytona Beach	Daytona Beach International	DAB	338,158	165,943	278,747	342,546	349,804	355,157	360,593
Melbourne	Melbourne International	MLB	239,233	109,925	176,701	244,608	249,470	254,428	259,486
Orlando	Orlando International	MCO	24,553,206	10,858,944	20,039,872	24,178,179	25,406,862	26,050,660	26,710,772
Orlando	Orlando Sanford International	SFB	1,510,469	769,598	1,189,799	1,508,915	1,625,669	1,730,277	1,841,616
District 6									
Key West	Key West International	EYW	483,178	323,107	743,708	774,451	796,239	818,640	841,671
Miami	Miami International	MIA	21,310,504	9,370,645	18,804,796	24,580,745	25,934,603	26,239,465	26,547,911
District 7									
St. Petersburg/ Clearwater	St. Pete-Clearwater International	PIE	1,125,744	694,693	1,017,978	1,210,015	1,276,864	1,343,713	1,410,562
Tampa	Tampa International	TPA	11,254,679	5,138,990	9,010,434	11,438,595	13,197,449	13,446,679	13,700,615
	Statewide Total		**98,232,550**	**44,573,637**	**81,436,626**	**98,515,165**	**106,913,131**	**109,769,814**	**112,741,551**

Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2021; Kimley-Horn, 2022

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

City	Airport Name	FAA ID	Forecasted Year-over-Year Change in Passenger Enplanements (Index Year: 2019)					
			2020	2021	2022	2023	2024	2025
District 1								
Fort Myers	Southwest Florida International	RSW	60%	103%	105%	109%	113%	116%
Punta Gorda	Punta Gorda	PGD	73%	95%	120%	139%	161%	187%
Sarasota/Bradenton	Sarasota/Bradenton International	SRQ	63%	162%	155%	156%	157%	158%
District 2								
Gainesville	Gainesville Regional	GNV	47%	76%	101%	104%	107%	110%
Jacksonville	Jacksonville International	JAX	41%	73%	101%	103%	105%	106%
District 3								
Destin/Fort Walton Beach	Destin-Fort Walton Beach	VPS	58%	123%	116%	120%	124%	129%
Panama City	Northwest Florida Beaches International	ECP	66%	129%	119%	130%	141%	154%
Pensacola	Pensacola International	PNS	52%	106%	107%	111%	115%	119%
Tallahassee	Tallahassee International	TLH	44%	76%	100%	102%	103%	104%
District 4								
Fort Lauderdale	Fort Lauderdale/Hollywood International	FLL	45%	76%	87%	104%	108%	113%
Vero Beach	Vero Beach Regional	VRB	36%	56%	83%	128%	167%	219%
West Palm Beach	Palm Beach International	PBI	45%	76%	100%	103%	104%	105%
District 5								
Daytona Beach	Daytona Beach International	DAB	49%	82%	101%	103%	105%	107%
Melbourne	Melbourne International	MLB	46%	74%	102%	104%	106%	108%
Orlando	Orlando International	MCO	43%	80%	96%	101%	104%	106%
Orlando	Orlando Sanford International	SFB	51%	79%	100%	108%	115%	122%
District 6								
Key West	Key West International	EYW	67%	154%	160%	165%	169%	174%
Miami	Miami International	MIA	41%	83%	108%	114%	115%	116%
District 7								
St. Petersburg/ Clearwater	St. Pete-Clearwater International	PIE	62%	90%	107%	113%	119%	125%
Tampa	Tampa International	TPA	100%	46%	80%	102%	117%	119%
	Statewide Total		**45%**	**83%**	**100%**	**109%**	**112%**	**115%**

Sources: FDOT Monthly Passenger Boarding Sheets (2015-2020), 2021; Kimley-Horn, 2022

3.5. Summary

Although the COVID-19 pandemic continues to impact the global economy and aviation industry, Florida's commercial service aviation industry has largely recovered and is set on a path towards record growth. This analysis presents passenger traffic forecasts for each of Florida's 20 commercial service airports and for the entire statewide commercial airport system.

Chapter 4. Economic Impact Update

4.1. Introduction

Florida's commercial service airports are economic generators in the communities they serve, as well as the state as a whole. The COVID-19 pandemic had an unparalleled impact on Florida's airports and the global aviation industry, resulting in substantial financial losses in almost every part of the industry. As such, the Florida Department of Transportation (FDOT) Aviation Office (AO) commissioned this analysis to quantify the effects of the pandemic, both in terms of losses and recovery, on the annual economic impacts generated by Florida's 20 commercial service airports in 2021. This analysis uses the findings of the 2019 Florida Statewide Aviation Economic Impact Study (EIS, the 2019 Study) to calculate economic impacts and compares 2021 results to 2020 results found in a previous version of this study. The subsequent analysis discusses the following topics:

- Economic Impact Changes at Florida Commercial Service Airports
- Summary

4.2. Economic Impact Changes at Florida Commercial Service Airports

FDOT uses statewide aviation economic impact studies to quantify the monetary and employment impacts of the Florida airport system. The most recent Florida Statewide Aviation EIS was completed in March 2019 and utilized calendar year (CY) 2017 data to measure economic impacts of 20 commercial service airports across the state. The 2019 Florida Statewide Aviation EIS communicated these impacts through four metrics:

- On-Airport Activities
- Visitor Spending (Commercial Service Airports and General Aviation Airports)
- Military Spending Impacts
- Industry Reliance Impacts

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 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 solely on the change in passenger traffic and subsequent visitor spending impacts at the 20 commercial service airports in Florida. It should be noted that updated spending profiles were not provided since this analysis did not include passenger surveying at the commercial service airports. It is recognized that spending patterns have changed as a result of COVID-19 due to a variety of reasons, such as reduced availability of staffing at hotels and restaurants, higher use of takeout services at restaurants, increased costs of hotels and rental cars, and many other changes.

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

4.2.1. Impact to 2020-2021 Passenger Traffic Levels

Each month, Florida's commercial service airports report the number of passenger enplanements and deplanements occurring at their respective facilities. These data were gathered to provide a comparison between statewide passenger traffic levels recorded in 2020, 2021, and 2017, the base year used in the 2019 Study.[1] **Table 4-1** provides a comparison between the 2017, 2020, and 2021 annual number of enplanements. As shown, statewide passenger enplanements declined 43 percent from 2017 in 2020 but had recovered to within five percent of 2017 levels in 2021.

Table 4-1: Annualized Statewide Enplanement Comparison

	2017	2020*	2021
Annual Enplanements	85,487,605	46,676,180	81,485,012

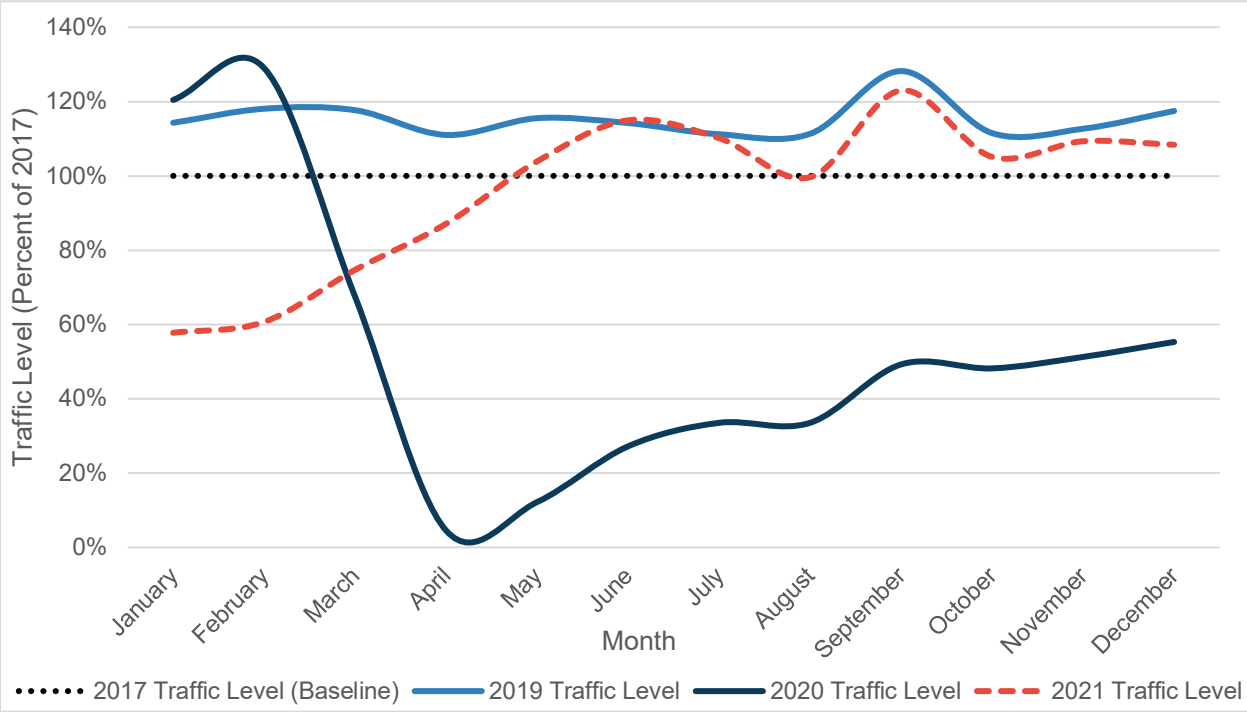
**Estimated using January-July 2020 actual data and August-December forecast*
Sources: FDOT Monthly Passenger Boarding Sheets, 2022 Kimley-Horn, 2022

It is important to note the year-over-year (YoY) changes in passenger enplanements presented in this chapter differ from those presented in **Chapter 3: Airport Forecasts and Recovery**. This economic impact analysis compares 2021 traffic levels to 2017 rather than 2019. Generally, passenger traffic increased at most Florida airports between 2017 and 2019. Therefore, the losses experienced in 2020 and 2021 due to the pandemic are smaller when compared to 2017 result than 2019 results. The change in passenger enplanements between 2017, 2019, 2020, and 2021 is illustrated in **Figure 4-1.**[2]

As shown, traffic levels in 2019 were 15 percent higher than 2017. Passenger traffic showed signs of strong growth in early 2020 before dropping more than 95 percent in April. After the initial upset, statewide passenger traffic grew steadily through the rest of the year. However, in January 2021, passenger traffic was still more than 40 percent lower than 2017 due to the surge in COVID-19 cases experienced worldwide. Traffic levels increased rapidly between February and June, and statewide traffic exceeded 2017 levels for the first time in May. Since then, traffic levels have fluctuated slightly but have generally remained above 2017 levels (but below 2019 levels). Traffic dipped slightly in August and again in October as tourist activities decreased around the state, which is typical during that time of year. As of December 2021, passenger traffic was approximately 108 percent of 2017 levels. In total, the number of annual passenger enplanements was 4.7 percent lower than the annual total from 2017, mainly due to depressed traffic levels recorded in the first half of the year.

[1] 2020 annualized enplanements used actual data from January-July 2020 and forecasted data developed in the previous version of this study from August-December. 44,573,677 million actual passenger enplanements were reported to FDOT in 2020.
[2] Passenger enplanements are presented as a percentage of same-month 2017 traffic. Therefore, if an airport recorded 10,000 enplanements in March 2017 and 9,000 enplanements in March 2019, the traffic level would be presented as 90 percent of 2017.

Figure 4-1: Statewide Passenger Enplanement Levels
2017, 2019, 2020, and 2021



Sources: FDOT Monthly Passenger Boarding Sheets, 2022; Kimley-Horn, 2022

4.2.2. Methodology and Results

The 2019 Statewide Aviation Economic Impact Study determined Florida's commercial service and GA airport system generated $174.8 billion in total economic impacts. The results of the 2019 Study are reevaluated in this analysis using CY 2021 average passenger traffic levels. Average passenger traffic levels were calculated to determine the annual change in passenger enplanements between CY 2017 and CY 2021 using historic passenger enplanements reported by airports to FDOT.

In 2021, Florida's commercial service airports experienced a 4.7 percent decrease in 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 4.7 percent, or $4.0 billion. This equated to an estimated 2021 commercial service visitor spending impact of $82.4 billion.

As noted previously, commercial service visitor spending was the only economic impact metric re-evaluated during this analysis to estimate 2021 economic impacts. Visitor spending represents only a portion of total statewide economic output. Therefore, the 4.7 percent reduction in visitor spending resulted in a 2.8 percent reduction in total output at commercial service airports ($144.2 billion in the 2019 Study to $140.2 billion in 2021). When the economic impacts of commercial service airports are combined with those of GA airports, the reduction in total statewide economic output measured in summer 2021 is estimated to be down only 2.3 percent compared to the 2019 Florida Statewide Aviation EIS. The 2021 total economic impact is 24 percent higher than the output reported for 2020, illustrating the strong growth in activity experienced by Florida's commercial service airports since the start of the pandemic. If Florida's

traffic levels continue on this observed positive trend, it is anticipated that economic activity will quickly return to or exceed levels identified in the 2019 Florida Statewide Aviation EIS. **Table 4-2** presents the estimated economic impacts for 2021 compared to 2020

Table 4-2: Estimated 2021 Statewide Commercial Service Airport Economic Impacts

Category	2020 Result	2021 Results
Change in Statewide Annual Passenger Enplanements (2017-2020/2021 [%])	-43%	-5%
Commercial Service Airport Impacts		
2017 Commercial Service Visitor Spending Impacts	$86,430,372,000	$86,430,372,000
Estimated Change in Commercial Service Visitor Spending Impacts (2017-2020/2021)	-$37,462,529,876	-$4,042,492,145
Estimated 2020/2021 Commercial Service Visitor Spending Impacts	$48,967,842,124	$82,387,879,855
2017 Florida Commercial Service Airport Economic Output	$144,274,770,000	$144,274,770,000
Estimated 2020/2021 Commercial Service Airport Economic Output	$106,812,240,124	$140,232,277,855
Estimated Change in Commercial Service Economic Output (2017-2021)	**-26%**	**-2.8%**
Statewide Impacts		
2017 Florida Statewide Airport Economic Output (All Airports)	**$174,843,568,000**	**$174,843,568,000**
Estimated Florida Statewide Airport Economic Output (All Airports)	**$137,381,038,124**	**$170,801,075,855**
Estimated Change in Statewide Economic Output (2017-2020/2021)	**-21%**	**-2.3%**

Sources: Florida Statewide Aviation Economic Impact Study, 2019; Kimley-Horn, 2022

4.3. Summary

The COVID-19 pandemic had a tremendous impact on airports, airlines, and associated businesses. Fortunately, Florida's commercial airport system has experienced steady economic growth in the months following the initial outbreak and has reached or exceeded pre-pandemic activity levels in recent months. This analysis was developed to quantify the change in the overall economic impacts of Florida's commercial service airport system using the results of the 2019 Florida Statewide Aviation Economic Impact Study. The resulting economic impact analysis indicates that the Florida airport system experienced significant losses in economic output as a result of the pandemic; however, economic activity at Florida's 20 commercial service airports has nearly recovered and is expected to grow as the global economy recovers.