

# Airport Profile

2015

BY THE NUMBERS

## Southwest Florida International Airport

Southwest Florida International Airport (RSW) is located in Lee County, Florida near the city of Fort Myers. The airport is the second busiest single-runway commercial service airport in the U.S. after San Diego International Airport.

Since RSW's addition to Florida's aviation system in 1983, the airport has experienced rapid and continuous growth. Immediately serving a well-known area of southwest Florida, the airport provides an easy access gateway to many of Florida's most sought after features. With 14,000 acres, RSW is the nation's third largest airport in terms of land size.

Enplanements at RSW increased over five percent between 2014 and 2015. This could be partially attributed to the addition of two domestic destinations in 2015, bringing the airport's total to 30.

Enplanements  
4,231,134

Passengers  
3,995,256

Average Fare  
\$180.33

U.S. Cities Served  
30

Intrastate  
Destinations  
2



## Data Explanation

For this report, three key data sources were used: *Passenger Origin-Destination Survey* from the U.S. Department of Transportation, the Official Airline Guide (OAG) and Airline Reporting Corporation (ARC). In this profile, data are combined and compared in order to identify general trends about the airport, as well as offer certain analysis on the findings. A description of these data sources is presented below. Throughout the text, the data sources will be further explained, but this section provides a general overview of the data used in the development of this Airport Air Service Profile.

### Air Passenger Origin and Destination (O&D) Survey

**DB1B Coupon:** The Airline Origin and Destination Survey (DB1B) is a 10 percent sample of airline tickets from reporting carriers collected by the Office of Airline Information of the Bureau of Transportation Statistics. Data from this source provides coupon-specific information for each domestic itinerary of the Origin and Destination Survey.

**T-100 Domestic Market:** This data source contains domestic market data reported by both U.S. and foreign air carriers, including carrier, origin, destination, and service class for enplaned passengers, freight and mail when both origin and destination airports are located within the boundaries of the United States and its territories.

### Official Airline Guide (OAG)

OAG data were summarized as weekly averages for the reported year. All OAG data are for direct flights and represents statistically significant samples of data.

### Airline Reporting Corporation (ARC)

The data provided by this source represent a statistically significant and representative sample of airline tickets purchased with a consumer form of payment through an ARC-accredited agency, including major online travel agencies (OTAs), such as Expedia, Orbitz, and Travelocity.

The data represent a 10 percent sample, an industry standard sample size, of passengers from participating agencies. Passenger volumes represented by the data can vary significantly by individual markets, depending on several factors including, but not limited to, the following: 1) the overall composition of air travelers (leisure vs. business); 2) the presence of carriers whose distribution is more heavily weighted toward the direct vs. agency channel (e.g. low cost carriers); and 3) the presence of carriers with limited participation in the ARC settlement system (e.g. Southwest Airlines).

The data used represent passengers and zip codes from where in Florida tickets were purchased. The data include purchases from Florida zip codes only. Because the data in this document represent consumer purchases of airline tickets, there is a natural bias toward leisure and unmanaged business travel behavior and may not account for all business travel. There also may be limitations due to misrepresentation of the passenger information in instances where a person from one zip code purchased a ticket for another person in a different zip code.

Airline Reporting Corporation (ARC) did not assist in the preparation of this analysis, all analyses disclosed herein were performed by Kimley-Horn and Associates, INC., the consultant to the Florida Department of Transportation, Central Aviation Office.

## Southwest Florida International Airport Air Service Summary

### Introduction

Southwest Florida International Airport (RSW) opened in 1983 as Southwest Florida Regional Airport with a single runway. The runway was extended to 12,000 feet in 1993. To serve the growth experienced by the airport, a new terminal was opened in 2005. Currently, the airport is one of the largest in the state in terms of total enplanements.

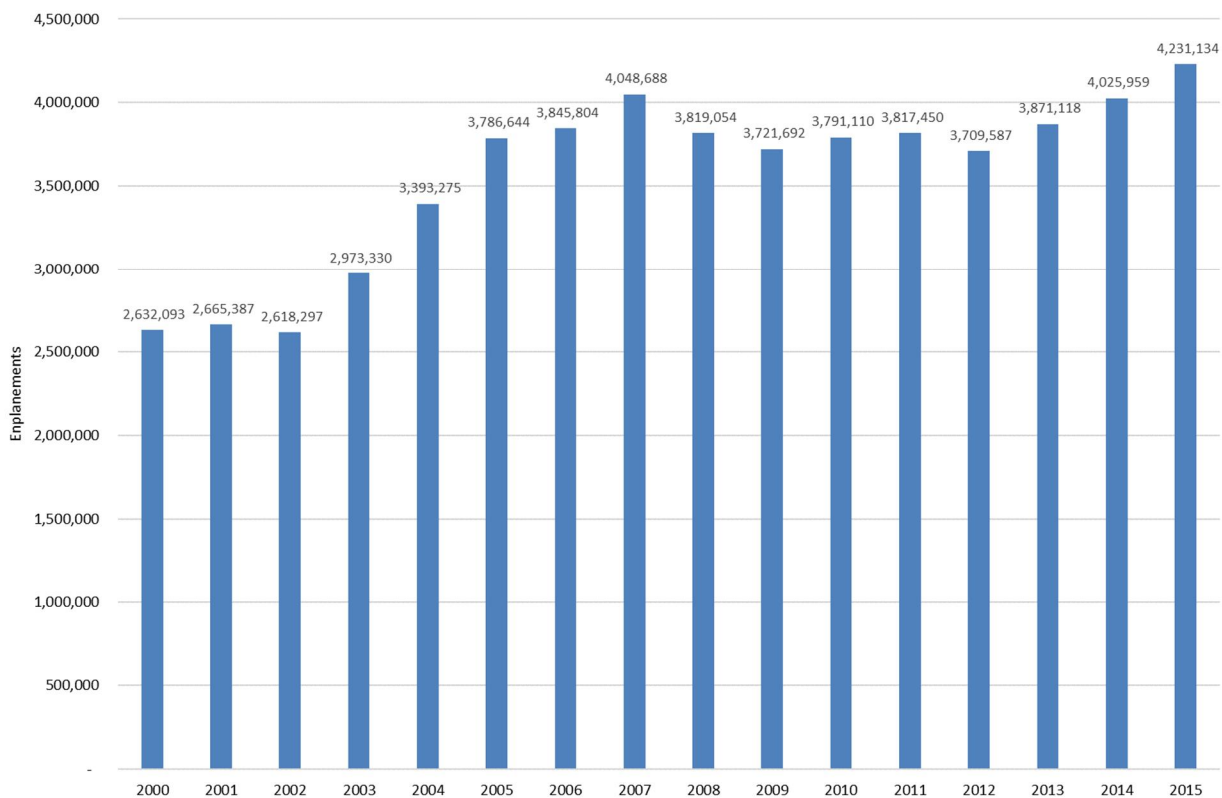
RSW is located in the Southwest Continuing Florida Aviation System Planning Process (CFASPP) region as well as FDOT District One. Also included in this region are Sarasota-Bradenton International Airport (SRQ) and Punta Gorda Airport (PGD). This airport profile will illustrate statistical data about RSW including: annual enplanements, local population data, and many other metrics. The following statistical information will provide a description of the most recent overall performance of RSW and how that compares to previous years' performance.

More information about RSW can be found at: <http://flylcpa.com/>

### Annual Enplanements

**Figure 1** represents total annual enplanements at RSW between 2000 and 2015. This analysis shows the gradual increase in enplanements over the last four years. Annual enplanements in 2015 were 4,231,134 compared to 4,025,959 in 2014, an over five percent increase and the highest recorded number for the airport.

Figure 1. Annual Enplanements<sup>1</sup>

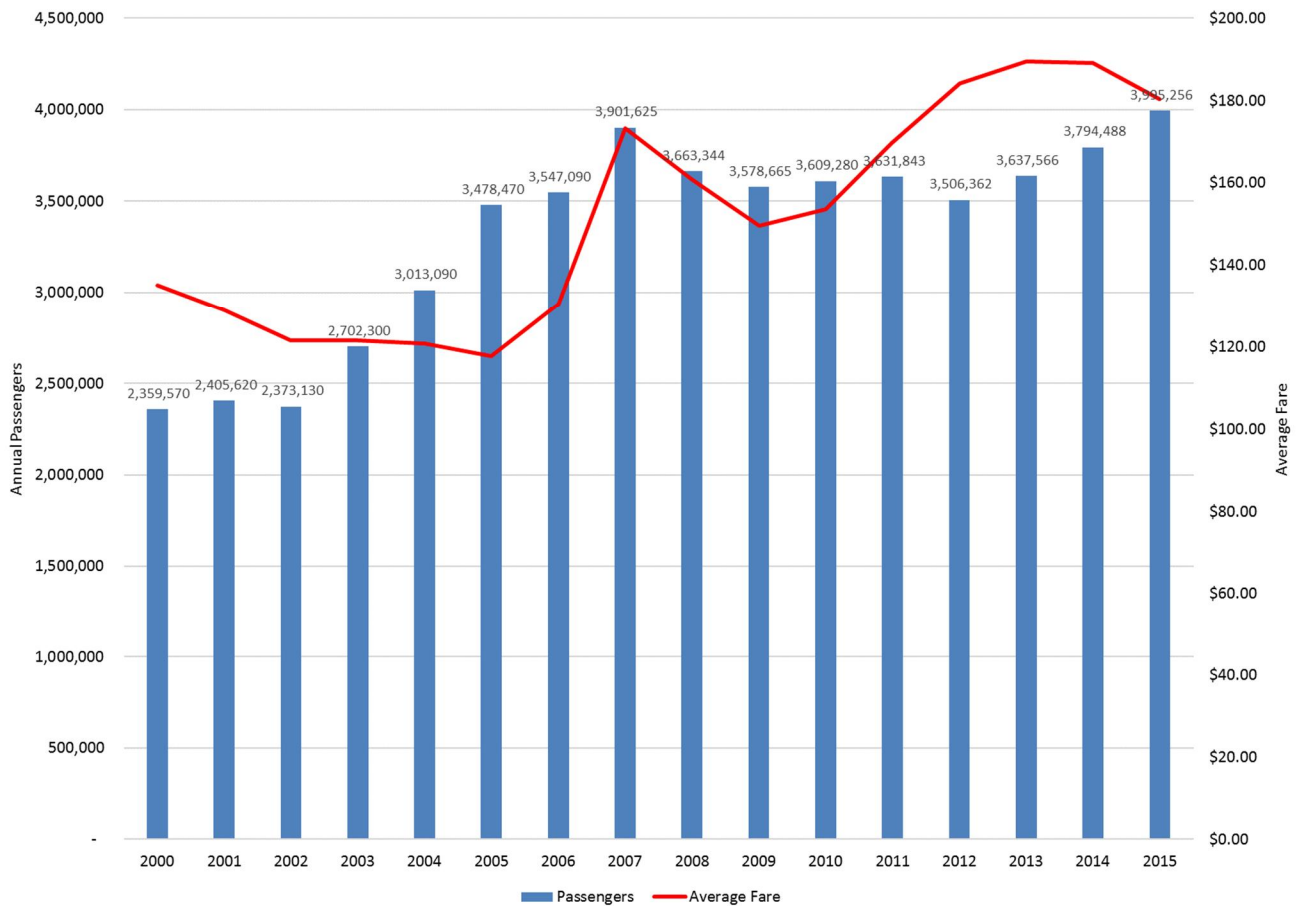


<sup>1</sup> Annual airport passenger traffic reports, provided by FDOT

## Passengers and Fares

RSW has experienced an increase in annual enplanements over the past three years. The passenger count for 2015 was marked at 3,995,256 which is nearly 200,000 more passengers than in 2014. In concert with the increase in annual passengers, the average annual fare decreased about \$8.80 to an average price of \$180.33. **Figure 2** displays the annual passengers and annual average fare at RSW.

Figure 2. Annual Domestic Passengers and Average Fares<sup>2</sup>



<sup>2</sup> U.S. Department of Transportation (U.S. DOT) Bureau of Transportation Statistics (BTS) O&D Survey & T-100 Domestic Market All Carriers

### Domestic Destination Airports

RSW served 30 domestic destinations in 2015. Two of these destinations were located within the state of Florida. These two destinations included:

- Key West International Airport (EYW) – 7 average flights per week
- Orlando International Airport (MCO) – 7 average flights per week

The two primary destinations served by RSW were:

- Hartsfield-Jackson Atlanta International Airport (ATL) - 82 average flights per week
- LaGuardia International Airport (LGA) - 34 average flights per week.

ATL is known as being one of the busiest airports in the world as well as being the primary hub for Delta Air Lines. Additionally, LGA is one of the largest airports in the U.S. and a known gateway to New York City and the rest of the Northeast. **Figure 3** displays RSW's domestic destinations.

### Domestic Routes

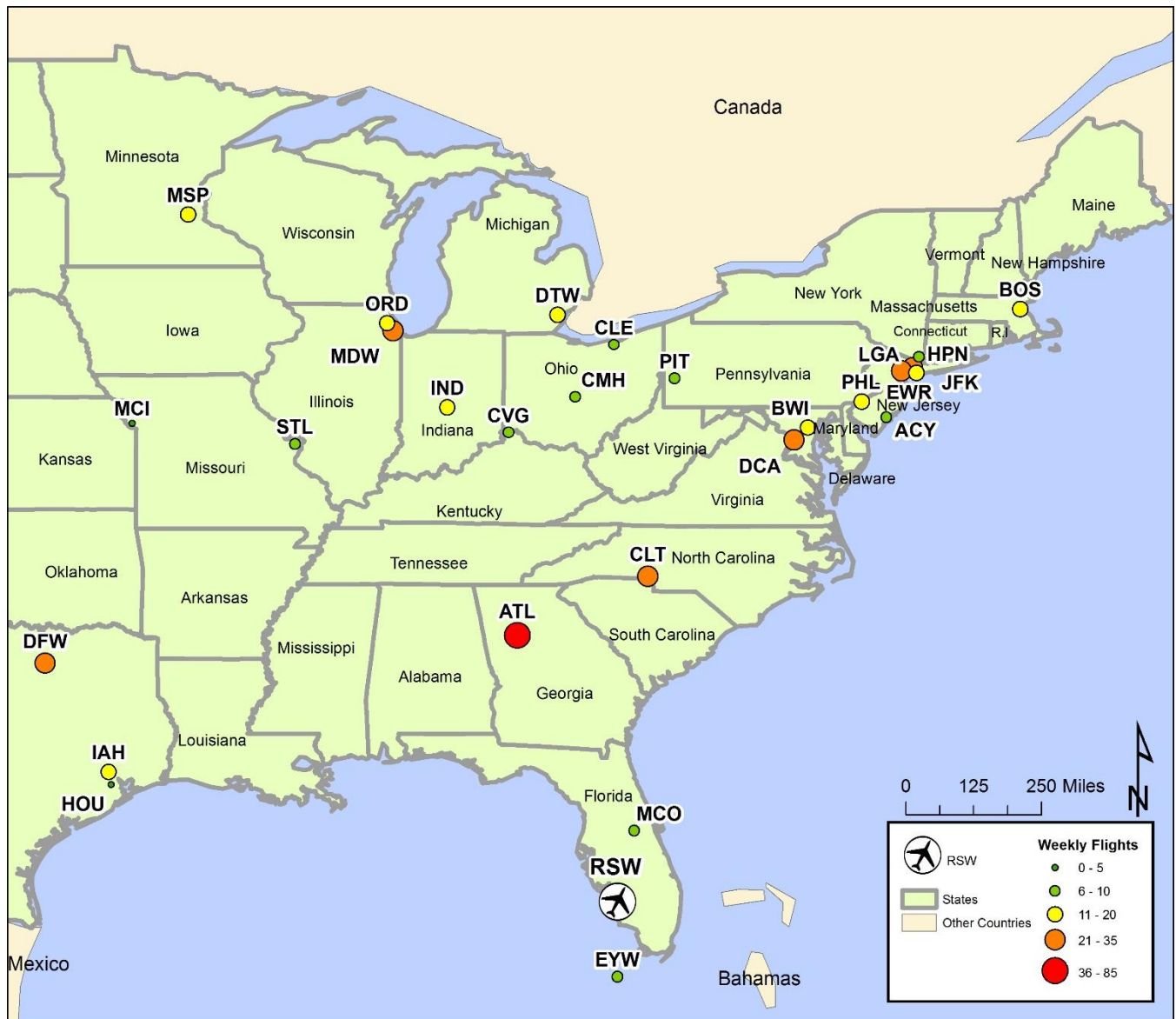
**Figure 4** displays RSW's top ten domestic routes. For purposes of this study, a route is the complete path taken by passengers from the starting airport (in this case RSW) to their final destination including all commercial flights. The routes from RSW shown below had the most frequent passengers traveling on them in 2015. All ten of the routes were direct to their final destinations, a characteristic common to large airports. The final destination of the top ten routes includes:

- Chicago O'Hare International Airport (ORD)
- Newark Liberty International Airport (EWR)
- LaGuardia Airport (LGA)
- Ronald Reagan Washington National Airport (DCA)
- Minneapolis-St. Paul International Airport (MSP)
- Boston Logan International Airport (BOS)
- John F. Kennedy International Airport (JFK)
- Hartsfield-Jackson Atlanta International Airport (ATL)
- Philadelphia International Airport (PHL)
- Detroit Metropolitan Airport (DTW)

This analysis represents the intention of the majority of passengers flying out of RSW. It should be noted that these airports are primarily in the northeast region of the U.S. Therefore, the appropriate conclusion is that the majority of passengers who travel from RSW are bound for those regions of the U.S. The high level of passengers bound for Minneapolis-St. Paul International Airport (MSP) is a characteristic relatively unique to RSW.

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Figure 3. RSW's Domestic Destinations<sup>3</sup>



<sup>3</sup> The Official Airline Guide (OAG)

Figure 4. Top Domestic Routes<sup>4</sup>

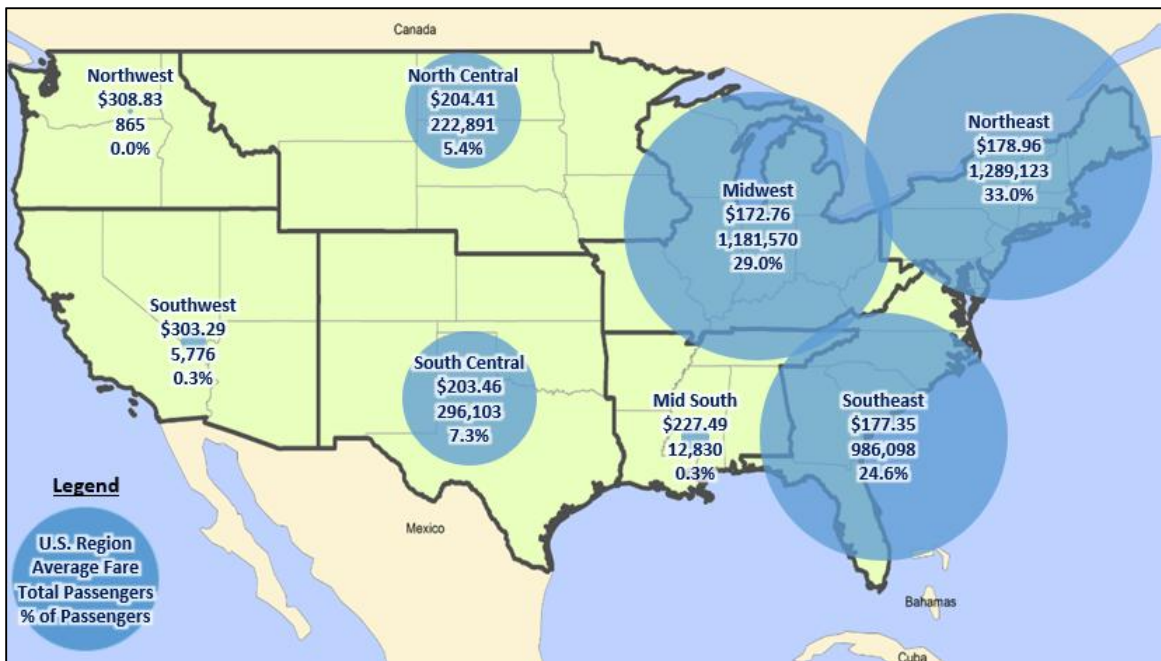


<sup>4</sup> Airline Reporting Corporation (ARC)

## Domestic Regional Analysis

**Figure 5** displays the average fare, number of passengers, and percentage of total passengers departing RSW and bound for each of the eight regions of the United States. The data shows that 33 percent of passengers departing RSW were bound for destinations in the Northeast region including LaGuardia Airport (LGA) which was one of the primary destinations in 2015. Following the Northeast, RSW had high passenger activity to the Midwest region with 29 percent. This region contains Chicago O'Hare International Airport (ORD), which received a large portion of RSW flights in 2015.

Figure 5. Domestic Passengers and Fares<sup>5</sup>



## International Flight Departures

RSW served an average of 12 international flights a week in 2015. Of these average weekly flights, nine were bound for Toronto, Canada, and three were bound of Dusseldorf, Germany.

## Aircraft Type

Of the 30 domestic destinations served by RSW, 27 were served by large jet aircraft, nine by regional jet aircraft, and two by turboprop aircraft. The use of large jet aircraft has a direct impact on the average seats per flight at an airport. Generally larger jet aircraft substantially increase the average seats per flights. **Figure 6** displays the aircraft types that served the 30 destinations from RSW as well as the average seats per flight on each aircraft type

Figure 6. Aircraft Types and Average Seats per Flight<sup>6</sup>



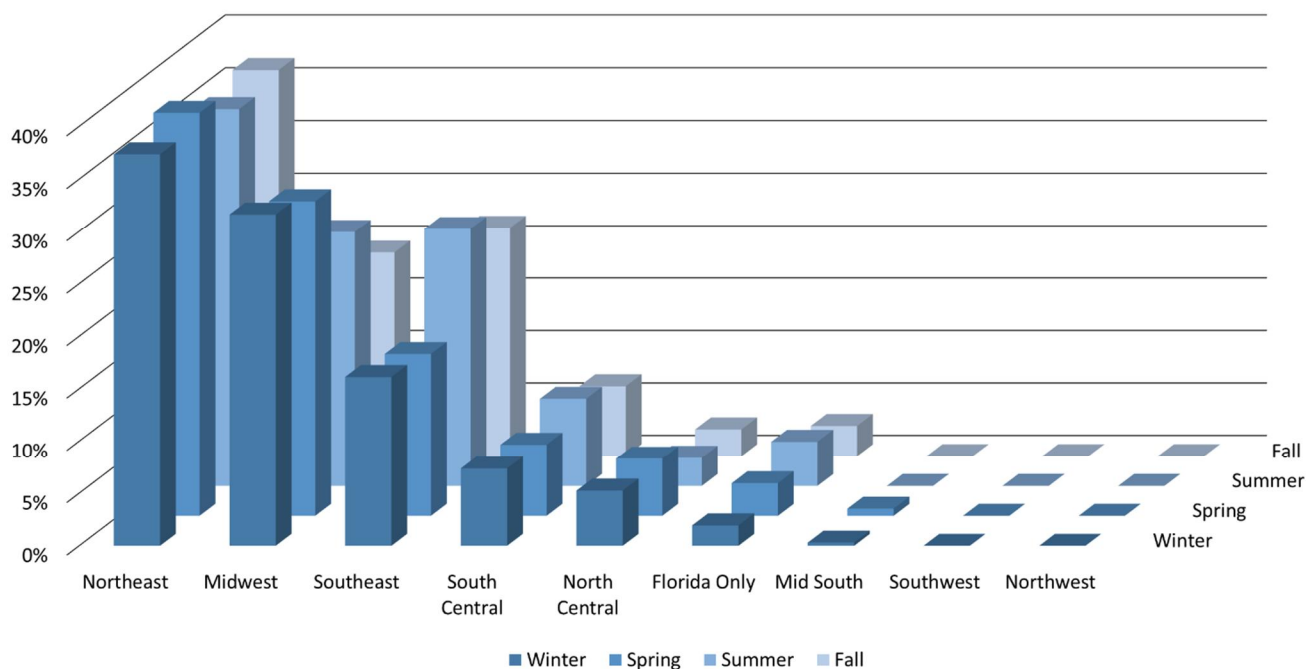
<sup>5</sup> The Official Airline Guide (OAG)

<sup>6</sup> The Official Airline Guide (OAG)

## Seasonal Flight Comparison

The data shown below in **Figure 7** further supports the identification of major routes to the Northeast region of the U.S despite the presence of direct commercial service to that region from RSW. Following the Northeast was the Midwest region. However, in the summer and fall seasons, service to the Southeast region (excluding Florida) increased largely, surpassing the Midwest.

Figure 7. Season by Region Analysis <sup>7</sup>



## Average Load Factors

Average load factors represent the number of passenger miles traveled as a proportion of available seat miles. Higher average load factors represent more total passenger boardings. The average load factor at RSW was 84.88, slightly higher than the U.S. average, 82.68, for 2015. Load factor statistics were derived from the Bureau of Transportation Statistics (BTS) T-100 segment data for the years 2014 and 2015. A summary of 2014 and 2015 average load factors is shown in **Table 1**.

Table 1. Average Load Factor Analysis<sup>8</sup>

Year	Domestic	International	Total
Southwest Florida International			
2014	84.76	82.83	84.60
2015	84.92	84.47	84.88
All U.S. Airports			
2014	84.49	81.03	82.69
2015	84.98	80.61	82.68

<sup>7</sup> The Official Airline Guide (OAG)

<sup>8</sup> The Bureau of Transportation Statistics (BTS) T-100 Table Data

### On-Flight Market Freight Statistics

Freight statistics represent the total number of pounds of freight, property other than mail and passenger baggage, transported by air **from** a given airport. In 2015, RSW shipped 10,718,556 pounds of freight, a roughly 360,000-pound increase from 2014. A summary of 2014 and 2015 on-flight market freight statistics is shown in **Table 2**. Freight statistics were derived from the Bureau of Transportation Statistics (BTS) T-100 segment data for the years 2014 and 2015.

Table 2. RSW Freight<sup>9</sup>

Year	Freight (in pounds)
2014	10,360,882
2015	10,718,556

### On-Flight Market Mail Statistics

Mail statistics represent the total number of pounds of U.S. and foreign mail shipped **from** a given airport. RSW shipped 82,804 pounds of mail in 2015. This came after a year in which data reported RSW shipping zero pounds of mail. A summary of 2014 and 2015 on-flight market mail statistics is shown in **Table 3**. Mail statistics were derived from the Bureau of Transportation Statistics (BTS) T-100 segment data for the years 2014 and 2015.

Table 3. RSW Mail<sup>10</sup>

Year	Mail (in pounds)
2014	0
2015	82,804

<sup>9</sup> The Bureau of Transportation Statistics (BTS) T-100 Segment Data

<sup>10</sup> The Bureau of Transportation Statistics (BTS) T-100 Table Data

## Market Leakage Study

### Introduction

Florida has the highest number of large hub airports (4) of any state in the U.S. Florida also has many commercial service airports (20), which compete for the same potential passengers. There are many factors that play into the decision-making of passengers, ranging from cost-to-airport proximity to how direct a route is. Because of these factors, many smaller commercial airports in Florida experience market leakage, or a loss of passengers who choose to drive further distances to airports for various reasons, such as less expensive flights or more convenient flight options. For large airports located in large metropolitan areas leakage may be a less significant factor because they still carry large numbers of passengers. Conversely for smaller airports the loss of passengers to larger airports may potentially be more significant. This analysis looks at tickets purchased in Florida zip codes to see which Florida airports may lose business due to market leakage. The market leakage study analyzes zip codes from where a ticket was purchased and subsequently which airport was departed from for that ticket purchase. To better understand the market leakage findings, key demographic data are presented as part of the market leakage study.

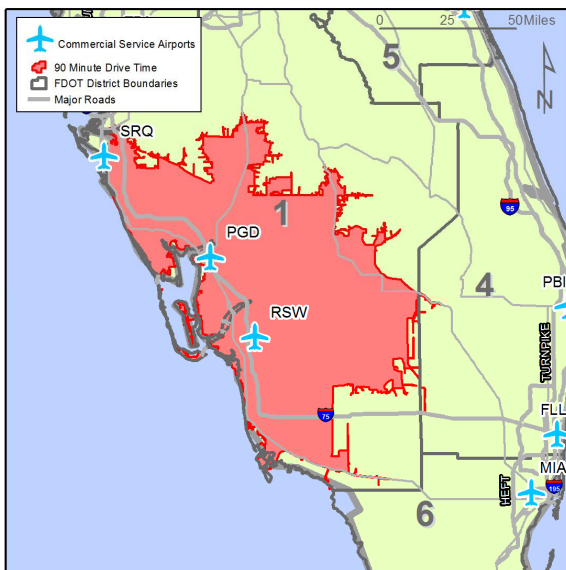
### Metropolitan Statistical Area (MSA)

RSW is the only commercial service airport in the Cape Coral-Ft. Myers MSA. According to the U.S. Census, an MSA is “a geographic entity based on the concept of a core area with a large population nucleus, plus adjacent communities having a high degree of economic and social integration with that core.” Per this definition, looking at population, employment, and other important factors at the level of an MSA, should prove beneficial in better understanding the area. Data are also analyzed at the county level where appropriate.

### Drive Time and Population Analysis

**Figure 8** displays the area around RSW that can access the airport with a 90-minute or less drive

**Figure 8. 90 Minute Drive Time Area<sup>12</sup>**



**Table 4. Population Within 90 Minutes<sup>11</sup>**

Population Trends	
2010 Total Population	1,635,299
2016 Total Population	1,783,652
2021 Total Population	1,945,739
2040 Total Population	2,707,868
2016-2021 Annual Rate of Change	1.75%
2016-2040 Percent Change	52%

time. Further, **Table 4** displays the population of that area in 2010 and 2016 as well as a projected population of the area for 2021 and 2040. The projected annual rate of change, or growth rate, between 2016 and 2021 of the population in that area is 1.75 percent. With this growth rate, this area is expected to have a 52 percent growth in population by the year 2040. Therefore, by the year 2040, it is anticipated that 2,707,868 people will have a 90 minute or less drive time from their homes

<sup>11</sup> U.S. Census Bureau, Census 2010 Summary – ESRI Housing Profile

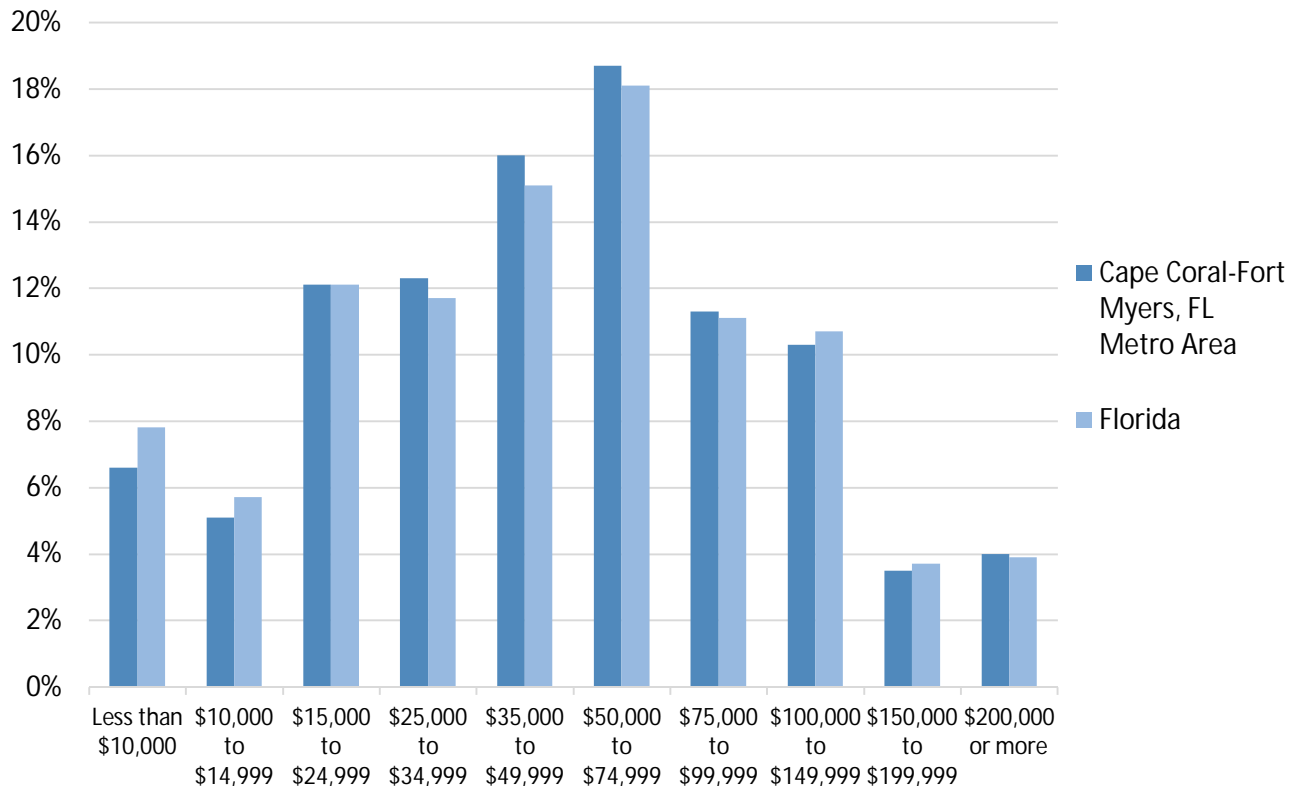
<sup>12</sup> U.S. Census Bureau, Census 2010 Summary – ESRI Housing Profile

to RSW. Therefore, it is anticipated that the demand for air service will increase proportionally in the future.

## Income Levels

Income levels for the Cape Coral-Fort Myers MSA depict a high population within the “middle class” when compared to other MSAs in the state. The income in an area may impact the demand for air travel in an area. In an area that has a comparatively high number of upper income households, more people may be willing to pay more in order to travel a shorter distance to the airport. Conversely, in lower income areas, people may be likely to drive a greater distance for air travel in order to capture reduced fares. A summary of income data for the MSA is shown below in **Figure 9**.

Figure 9. MSA and Florida Income Comparison<sup>13</sup>



## Employment

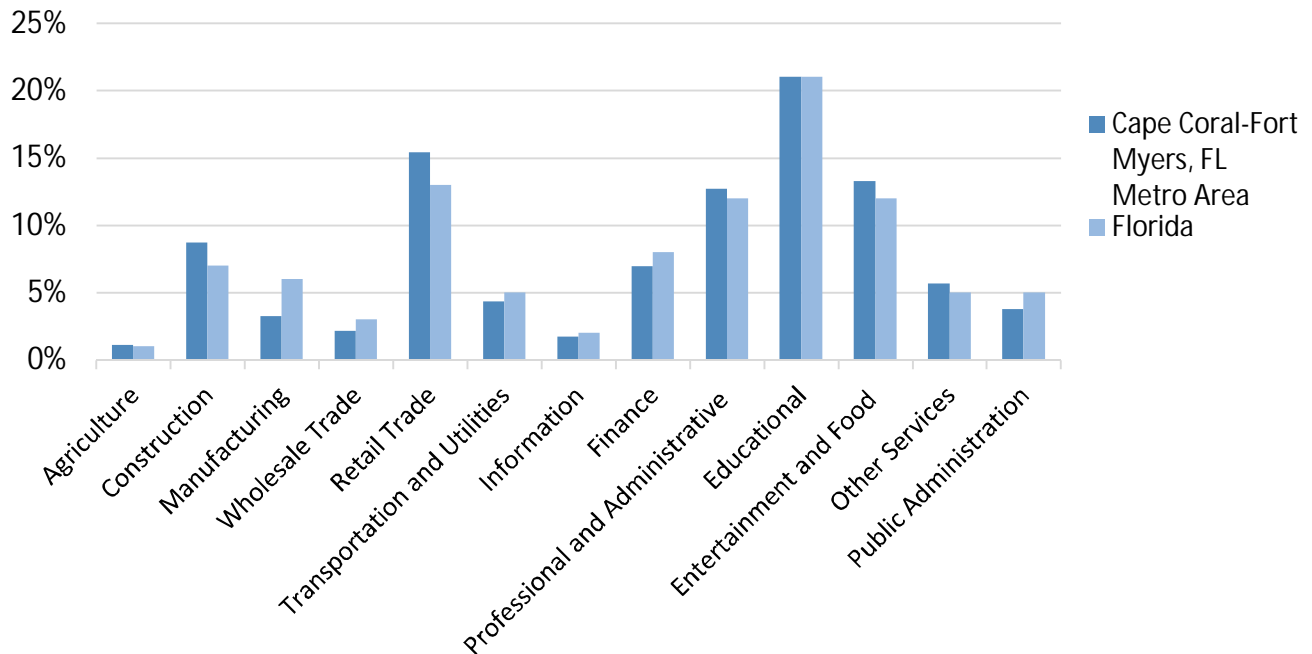
The type of employment that is located in an area may also have an effect on airline travel. For areas that have a large number of companies that participate in professional and financial services, demand for local air travel will likely increase because they may be less concerned about the cost of flights and more concerned about ease of access to the airport. In most cases, differences will exist between the MSA and the state averages, but these discrepancies are generally not large enough to impact commercial air service demand. The Cape Coral-Fort Myers MSA shows differences from the state average for employment by industry group. Specifically, the MSA has a higher percentage of employment in the retail

<sup>13</sup> U.S. Census American Fact Finder

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trade, construction, and entertainment/food industries. In the manufacturing industry, the MSA falls below the state average. **Figure 10** below shows the breakdown of employment by industry.

Figure 10. Employment by Industry<sup>14</sup>



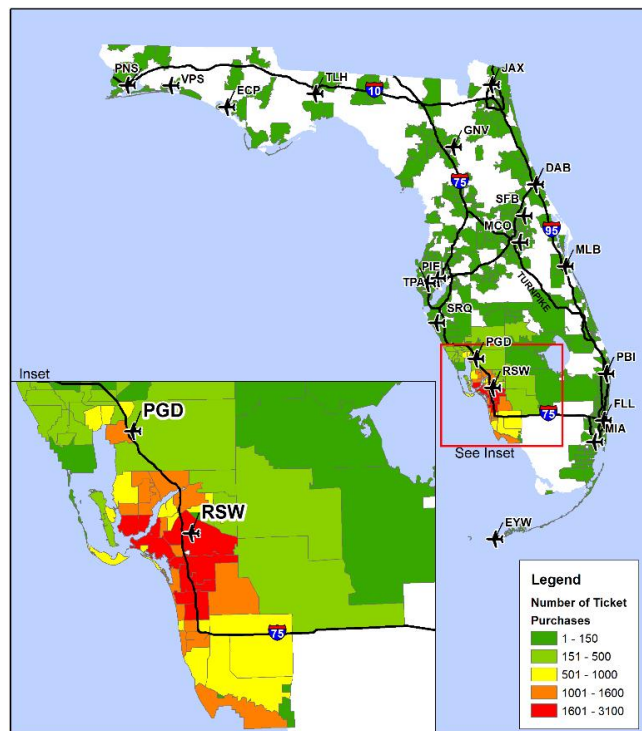
### Market Leakage

**Figure 11** displays the zip codes in Florida where tickets for flights departing from RSW were purchased. This graphic shows the purchases of tickets primarily in the area surrounding RSW. However, tickets have been purchased for RSW flights from all over the state of Florida. Some areas with noticeable aggregations of ticket purchases include Tampa and Daytona. The majority of tickets purchased for RSW flights were purchased from in-state locations. However, only 49 percent of ticket purchases were from out-of-state locations. Other states where RSW ticket purchases were made include:

- New York – 5%
- Illinois – 4%
- Ohio – 3%
- Michigan – 3%

Based on the 2015 market leakage analysis, Southwest Florida International Airport does

Figure 11. In-state Ticket Purchases<sup>15</sup>

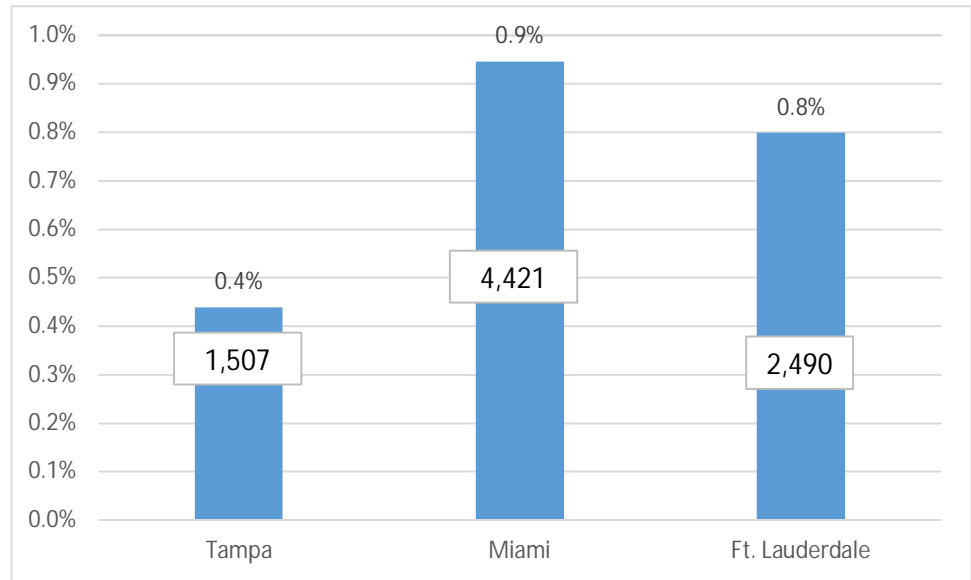


<sup>14</sup> U.S. Census American Fact Finder

<sup>15</sup> Airline Reporting Corporation (ARC)

not leak a substantial amount of flights to any other commercial service airports. Of passengers that departed from Miami International, 0.9 percent were from Lee County. Of passengers that departed from Ft. Lauderdale-Hollywood International, 0.8 percent were from Lee County. **Figure 12** illustrates three of the top airports that receive leaked passengers from the Southwest Florida International Airport market area. The values that are presented represent the number and

**Figure 12. In-state Ticket Purchases<sup>16</sup>**  
(Represented as a Percentage of the Departing Airports Total Enplanement Volumes in 2015)



percent of passengers who purchased their ticket from a Lee County zip code but flew out of an alternative airport. Southwest Florida International Airport, like many of the larger airports was able to attract leaked passengers from smaller airports nearby. Of the passengers that departed from Southwest Florida International Airport, 4.4 percent were from Charlotte County, the primary market for Punta Gorda Airport. Data represents a 10 percent sample of all months of 2015.