

# Airport Profile

## St. Pete – Clearwater International

St. Pete-Clearwater International Airport (PIE) is located in Pinellas County, Florida about nine miles north of downtown St. Petersburg, seven miles southeast of Clearwater, and seventeen miles southwest of Tampa.

St. Petersburg is a city well known for its easy access to Florida's gulf coast beaches. Additionally, St. Pete is a close gateway to Tampa and Clearwater. With the close proximity of Tampa International Airport (TPA), one of Florida's four large hub airports, PIE has filled a niche of low-cost carriers to unique destinations.

Since 2009, PIE's annual enplanements and passengers have rapidly climbed. In 2015, PIE had 818,598 enplanements and 809,754 passengers bound for the airport's 44 domestic destinations.

# 2015

## BY THE NUMBERS

818,598  
Enplanements

809,754  
Passengers

\$88.54  
Average Fare

44  
U.S. Cities Served



## 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.

## St. Pete-Clearwater International Airport Air Service Summary

### Introduction

St. Pete-Clearwater International Airport (PIE) was established in 1941 by the United States Army Air Forces as a military flight training. The airport began its commercial airline service by being the home airport to the first commercial flight in the world in 1914 when Tony Jannus flew the mayor of St. Petersburg to Tampa in his Benoist XIV amphibious aircraft. PIE has seen many changes since then and now has two runways measuring 5,900 feet, and 9,730 feet in length.

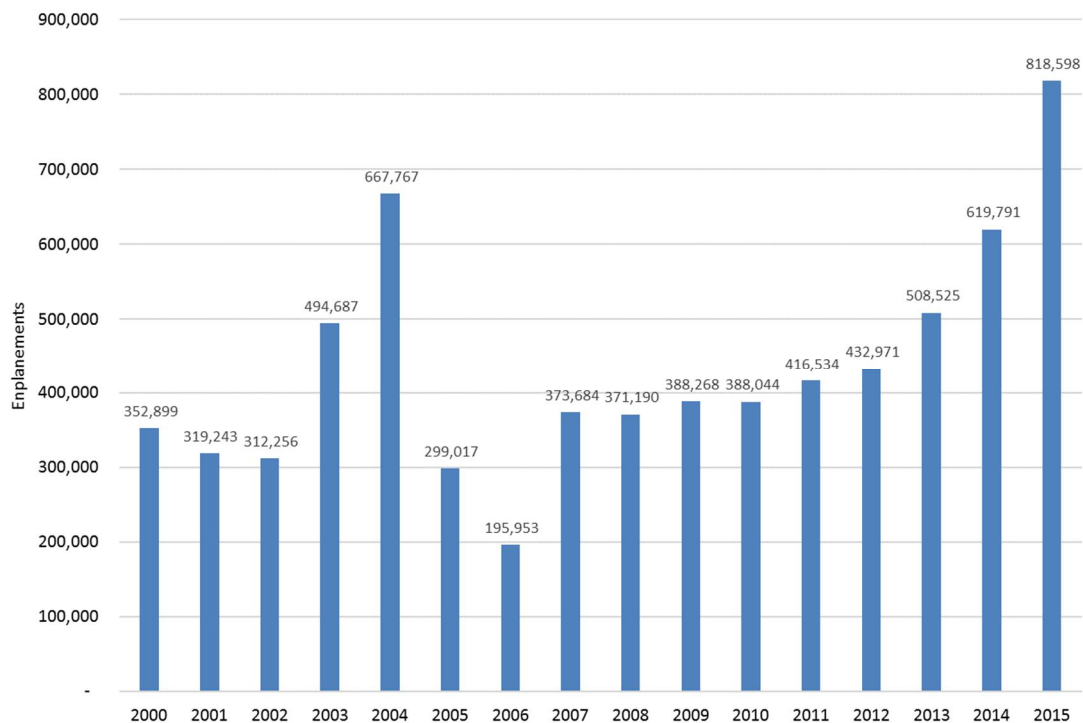
PIE is located in the West Central Continuing Florida Aviation System Planning Process (CFASPP) region and FDOT District Seven. Also, included in this region and district is Tampa International Airport (TPA). This airport profile will illustrate statistical data about PIE including: annual enplanements, air carrier market share, as well as many other metrics using baseline conditions reported from 2014 and 2015 data. The following statistical information will provide a description of the most recent overall performance of PIE and how that compares to previous years' performance.

More information about PIE can be found at: <http://www.fly2pie.com/>

### Annual Enplanements

**Figure 1** represents total annual enplanements at PIE between 2000 and 2015. This data shows a substantial increase in enplanements between 2006 and 2015. PIE had 818,598 enplanements in 2015 compared to 619,791 in 2014. This 32 percent growth in annual enplanements suggests rapidly increasing demand for operations at PIE. Due to a lack of data representing low cost carriers such as Allegiant Air, an airline with a major presence at PIE, some data presented in this profile, such as enplanements, is not completely representative.

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



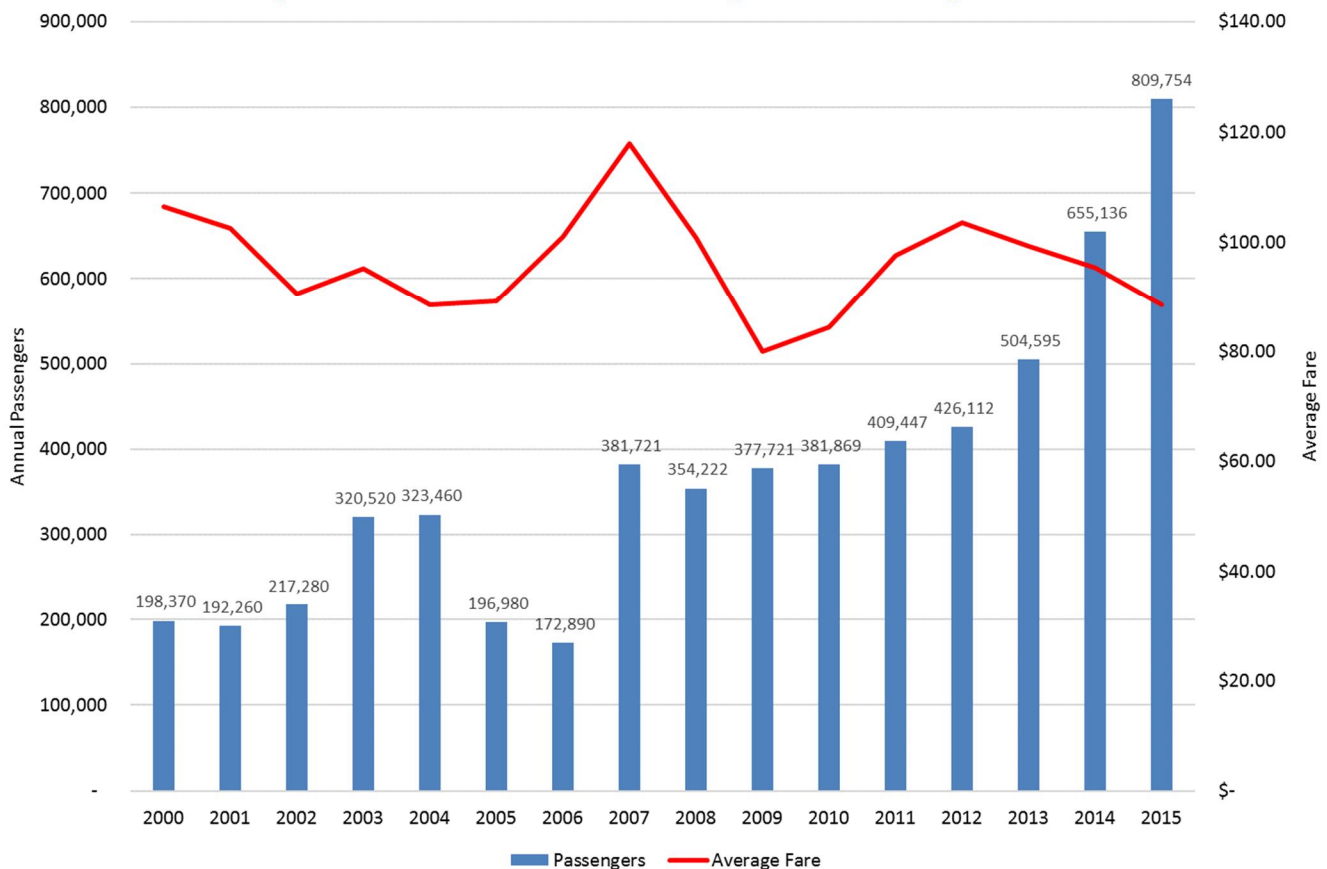
<sup>1</sup> Annual airport passenger traffic reports, provided by FDOT

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### Passengers and Fares

PIE has seen a sharp increase in annual passengers between 2008 and 2015. In 2015 PIE had 809,754 annual passengers, this is roughly a 150,000 passenger increase from the passenger count in 2014. In concert with the increasing passenger count, the average fare at PIE decreased in 2015 to \$88.54. This is roughly a \$7.00 decrease from 2014, although still above the low point of \$79.97 in 2009. **Figure 2** displays the annual passengers and annual average fare at PIE.

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

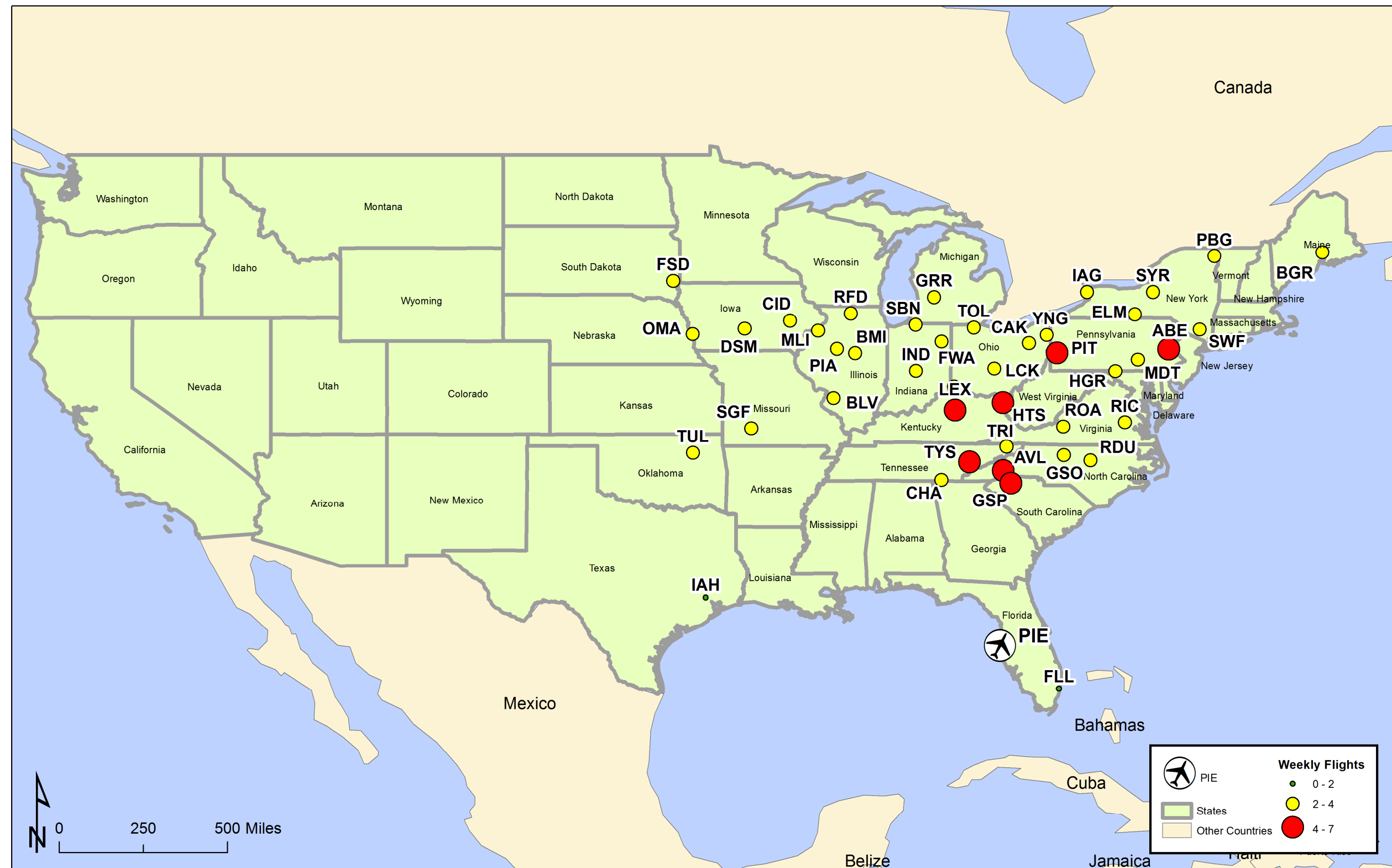


### Destination Airports

PIE served 44 destinations throughout the U.S. in 2015. Of flights departing from PIE, the destination receiving the most weekly flights was McGhee Tyson Airport (TYS) in Knoxville, Tennessee. This destination received an average of six flights a week from PIE. Following TYS was Asheville Regional Airport (AVL) in Asheville, North Carolina. **Figure 3** displays PIE's nonstop domestic destinations.

<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

Figure 3. PIE's Nonstop Domestic Destinations<sup>3</sup>

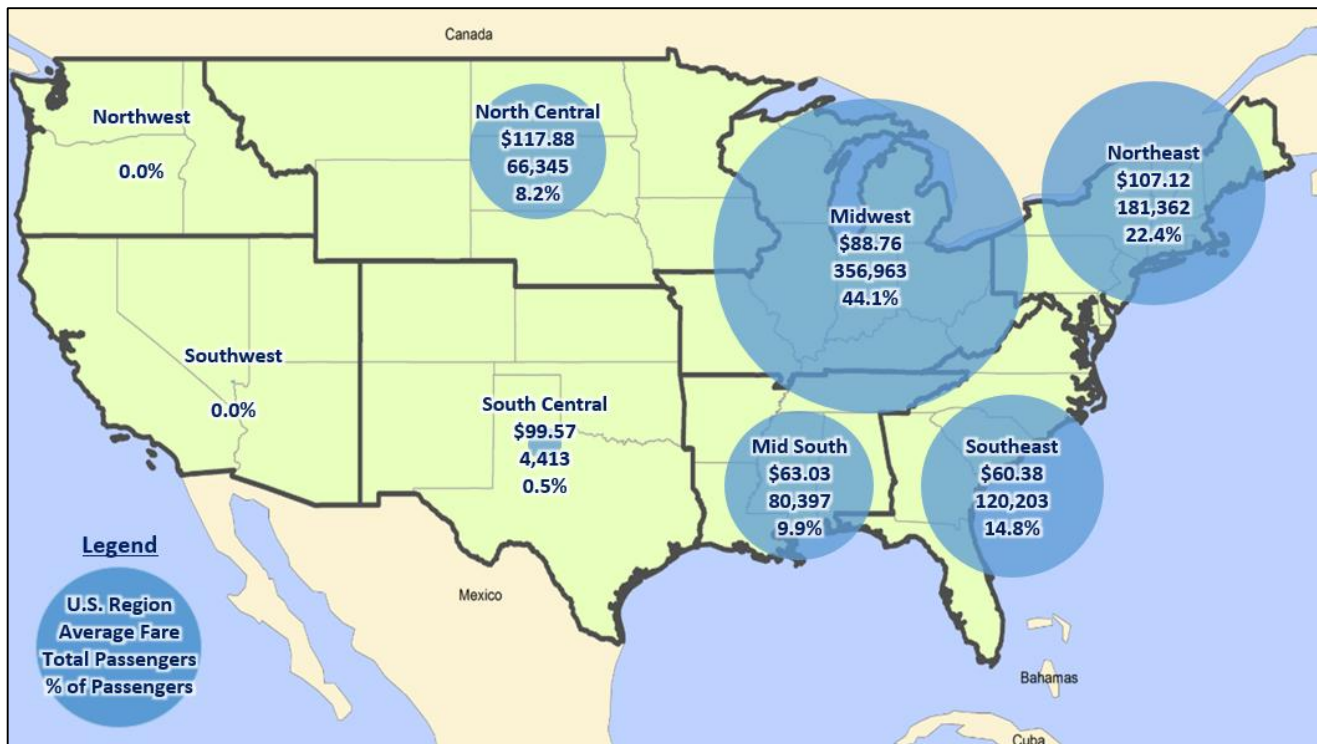


<sup>3</sup> The Official Airline Guide (OAG)

## Domestic Regional Analysis

**Figure 4** displays the average fare, number of passengers, and percentage of total passengers departing PIE and bound for each of the eight regions of the United States. The data shows that 44.1 percent of passengers departing PIE were bound for destinations in the Midwest region. The Midwest region contains numerous airports that received a large portion of PIE's service in 2015. It should be noted that **Figure 4** incorporates Florida airports into the southeast region, therefore adding PIE's intrastate service to the southeast percentage. The northeast region received the second most passengers from PIE in 2015 at 22.4 percent. This region contains several airports that received large amounts of service from PIE in 2015.

Figure 4. Domestic Passengers and Fares<sup>4</sup>



## International Flight Departures

PIE did not serve international destinations in 2015.

## Aircraft Type

Of the 44 destinations served by PIE, all 44 were served by large jet 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 flight, which was 177 for PIE in 2015.

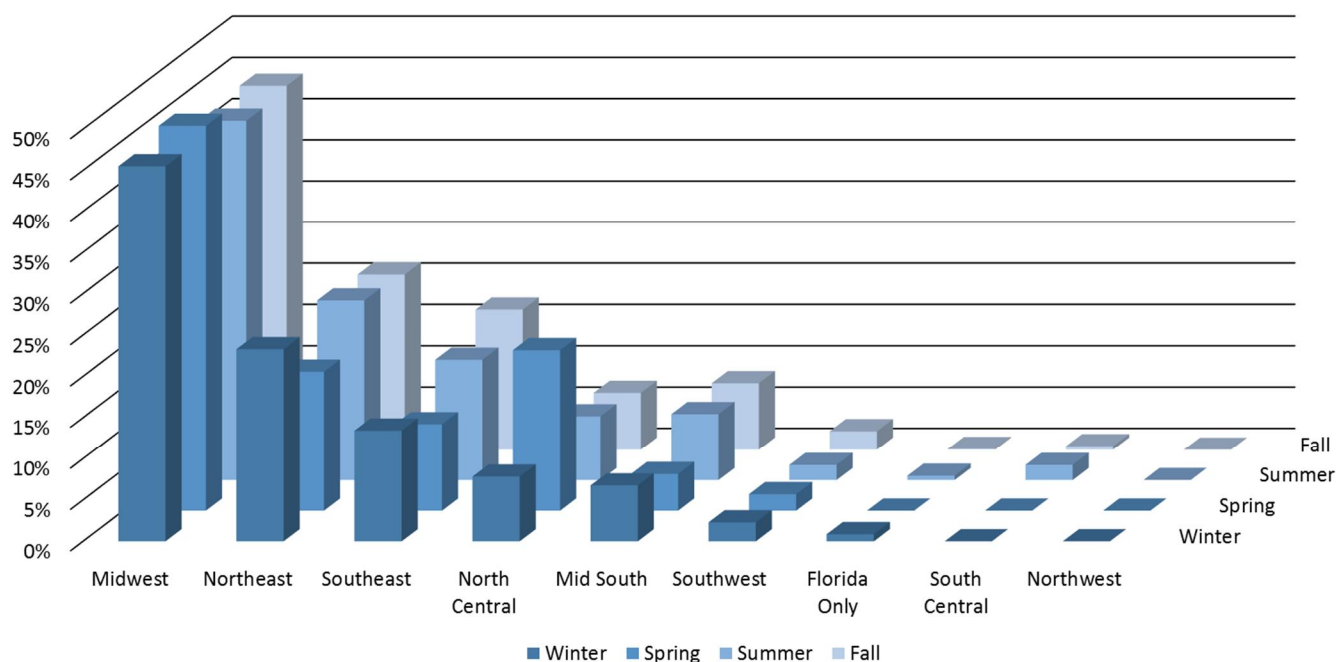
<sup>4</sup> The Official Airline Guide (OAG)



## Seasonal Flight Comparison

The data shown in **Figure 5** further support the identification of major routes to the Midwest region and airports in the Northeast. In the spring, flights from PIE to the North Central region increase substantially, surpassing flights to the Southeast and the Northeast. **Figure 5** also shows that flights bound for the South Central region increase in the summer, while remaining relatively non-existent in the other three seasons of the year.

Figure 5. Season by Region Analysis<sup>5</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 PIE was 86.03, notably higher than the U.S. average, 82.68, for 2015. A summary of 2014 and 2015 average load factors is shown in **Table 1**.

Table 1. Average Load Factor Analysis

Year	Domestic	International	Total
<b>St. Pete-Clearwater International</b>			
2014	88.58	78.57	88.38
2015	86.14	80.10	86.03
<b>All U.S. Airports</b>			
2014	84.49	81.03	82.69
2015	84.98	80.61	82.68

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

### 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, PIE shipped nearly 20 million pounds of freight, a roughly two million-pound increase from 2014. A summary of 2014 and 2015 on-flight market freight statistics is shown in **Table 2**.

Table 2. PIE Freight<sup>6</sup>

Year	Freight (in pounds)
2014	17,086,985
2015	19,904,645

### On-Flight Market Mail Statistics

Mail statistics represent the total number of pounds of U.S. and foreign mail shipped **from** a given airport. PIE had a significant increase in pounds of mail shipped between 2014 and 2015 with roughly 900,000 pounds more being shipped in 2015. A summary of 2014 and 2015 on-flight market mail statistics is shown in **Table 3**.

Table 3. PIE Mail<sup>7</sup>

Year	Mail (in pounds)
2014	230
2015	900,154

<sup>6</sup> The Bureau of Transportation Statistics (BTS) T-100 Segment Data

<sup>7</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 flight 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.

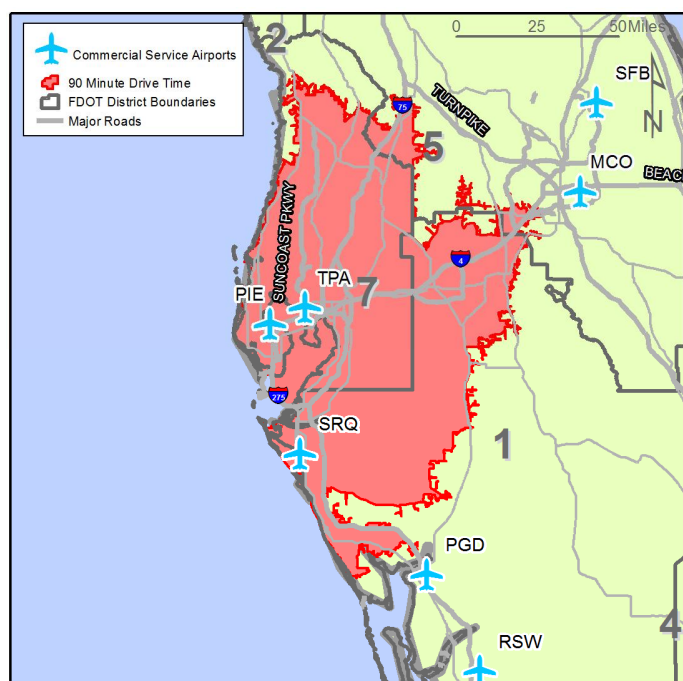
### Metropolitan Statistical Area (MSA)

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 higher degree of economic and social integration with that core.” Per this definition, looking at populations, employment, and other important factors at the level of an MSA, should prove beneficial in better understanding the area. PIE is one of two commercial airports located in the Tampa-St. Petersburg-Clearwater MSA.

### Drive Time and Population Analysis

**Figure 6** displays the area around PIE that can

**Figure 6. 90 Minute Drive Time Area<sup>9</sup>**



**Table 4. Population Within 90 Minutes<sup>8</sup>**

Population Trends	
2010 Total Population	4,079,935
2016 Total Population	4,358,313
2021 Total Population	4,643,175
2040 Total Population	5,906,120
2016-2021 Annual Rate of Change	1.27%
2016-2040 Percent Change	36%

access the airport with a 90-minute or less drive time. Further, **Table 4** displays the population of that area in 2010 and 2016 as well as the projected population in 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 1.27 percent. With this growth rate, this area is expected to have a 36 percent growth in population by the year 2040. Therefore, by the year 2040, it is anticipated that 5,906,120 people will have a 90 minute or less drive time from their homes to PIE. Therefore, it is anticipated that the demand for air service will increase proportionally in the future.

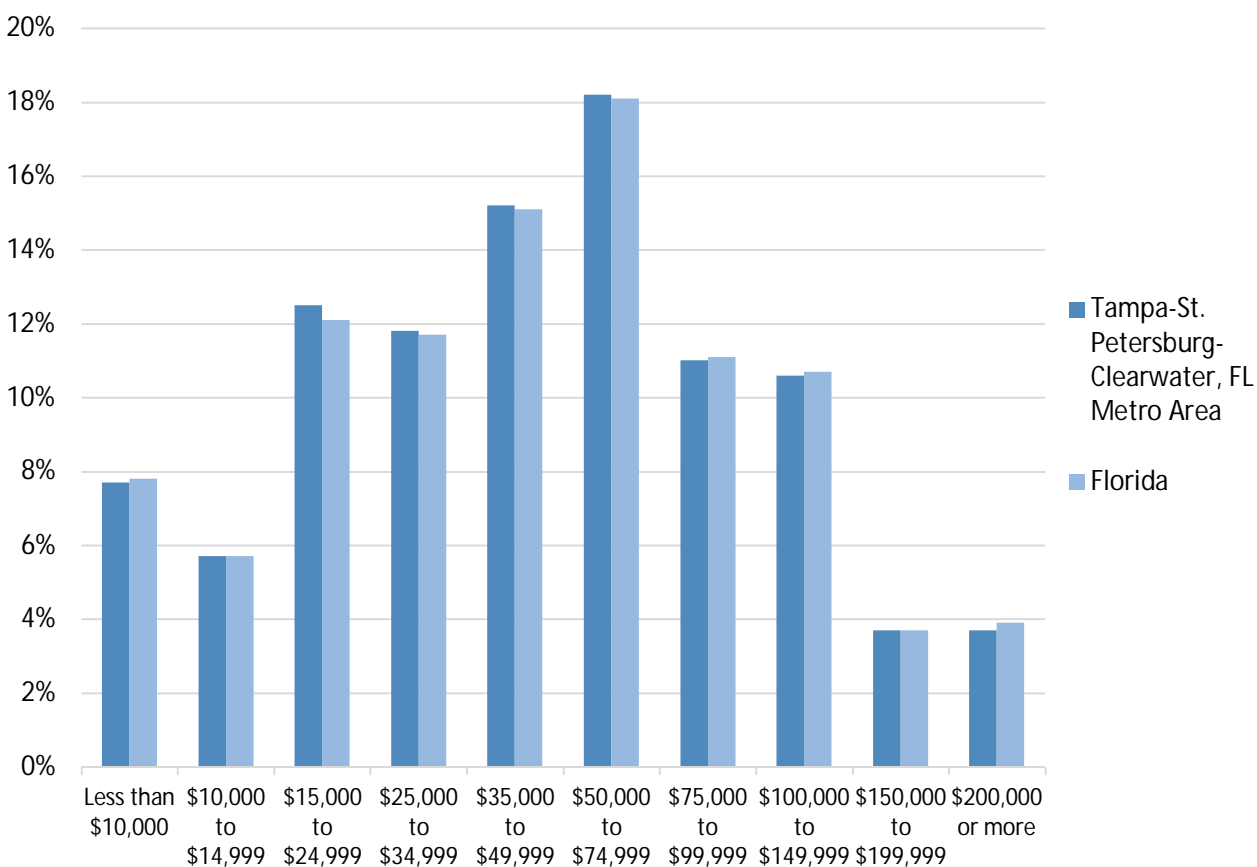
<sup>8</sup> U.S. Census Bureau, Census 2010 Summary – ESRI Housing Profile

<sup>9</sup> U.S. Census Bureau, Census 2010 Summary – ESRI Housing Profile

## Income Levels

The income distribution in the Tampa-St. Petersburg-Clearwater MSA follows normal trends when compared to other MSA's in the state. The income in an area may impact the demand for air travel in an area. In an area that has a relatively high number of upper income households, more people may be willing to pay more in order to travel a shorter distance to the airport. In lower income areas, people may be likely to drive a greater distance for air travel in order to capture reduced fares. Many other factors affect airports other than income, and in an area with a dense population that has multiple large hub commercial airports within a relatively close proximity, there may be a multitude of reasons that a household may choose to use a given airport. A summary of income data for the MSA are in **Figure 7** below. Income data for the MSA and State was derived from the US Census American Fact Finder.

Figure 7. MSA and Florida Income Comparison<sup>10</sup>



## Employment

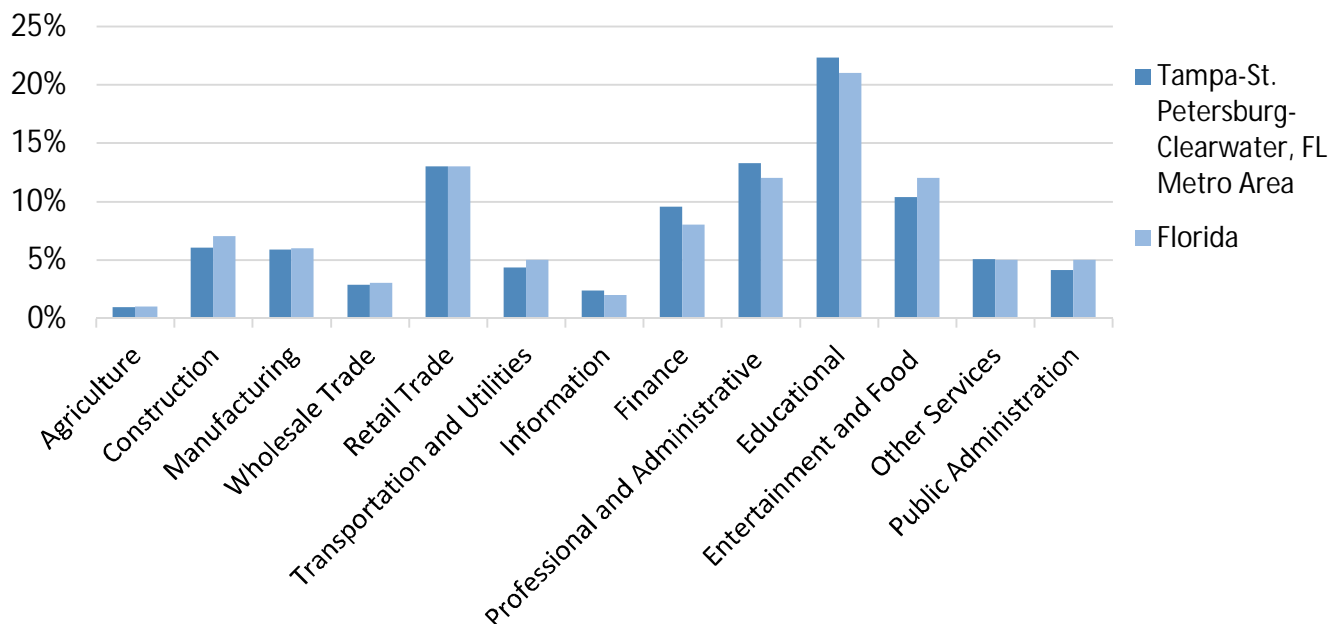
The primary types of employment located in an area may influence air travel. For areas that have a large number of companies that participate in professional and financial services, demand for local air travel will likely increase because they are less concerned about the cost of flights and more concerned about ease of access to the airport. In most cases, differences will exist between the county and the state averages, but these discrepancies are generally not large enough to impact commercial air service demand. The Tampa-St. Petersburg-Clearwater MSA has a relatively parallel relationship with Florida's employment by industry percentages. A summary of employment by industry can be seen in **Figure 8**. As shown, MSA

<sup>10</sup> U.S. Census American Fact Finder

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has a high employment percentage in the finance, professional and administrative, and educational industries compared to the rest of the state. This higher percentage could result in increased demand for local air travel and increase TPA's annual passenger count.

Figure 8. Employment by Industry<sup>11</sup>

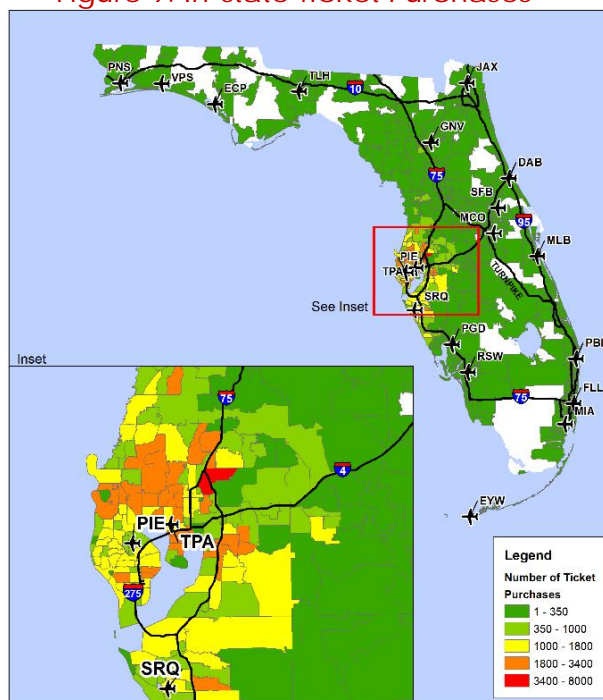


### Market Leakage

**Figure 9** displays the zip codes in Florida where tickets for flights departing from PIE were purchased. This graphic shows the purchases of tickets primarily in the area surrounding PIE. However, tickets have been purchased for PIE flights from all over the state of Florida. Some areas with noticeable aggregations of ticket purchases include Jacksonville, Tallahassee, and Daytona. The majority of tickets purchased for PIE flights were purchased from in-state locations. In fact, only 15 percent of ticket purchases were from out of state locations. The other states where ticket purchases were made included but aren't limited to:

- Illinois – 6%
- Michigan – 3%
- New York – 2%

Figure 9. In-state Ticket Purchases<sup>12</sup>



<sup>11</sup> U.S. Census American Fact Finder

<sup>12</sup> Airline Reporting Corporation (ARC)

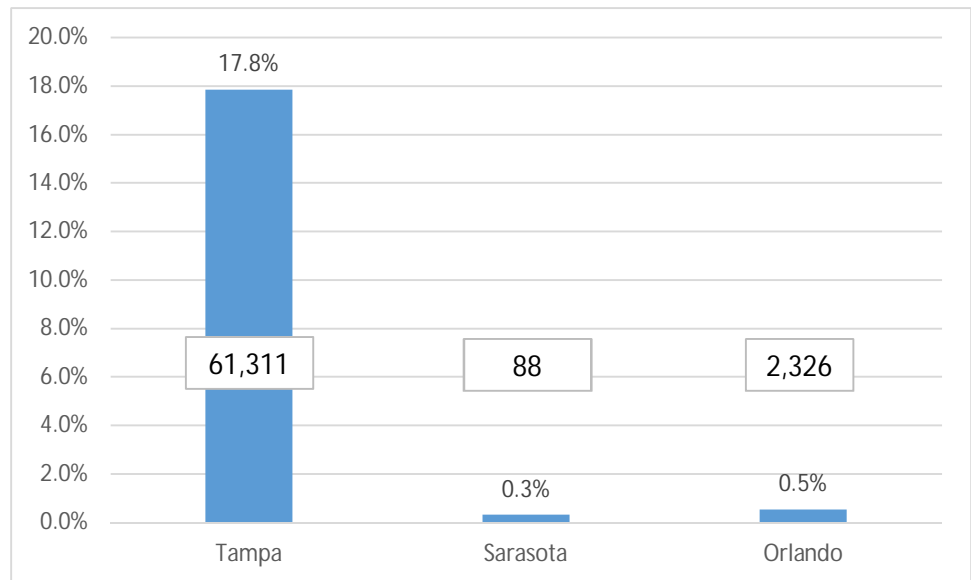
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The analysis determined that St. Pete-Clearwater International Airport market leaks a large number of passengers to Tampa International Airport. Of all passengers leaving Tampa International Airport in 2015, 17.8 percent were from Pinellas County.

**Figure 10** illustrates three of the top airports that receive leaked passengers from the St. Pete-Clearwater International Airport market area. The values that are presented represent the number and percent of passengers who purchased their ticket from

a Pinellas County zip code but flew out of an alternative airport. Data represent a 10 percent sample of all months of 2015. Due to the limited data reported for St. Pete-Clearwater International Airport, the market leakage analysis did not determine if St. Pete-Clearwater International Airport received flights from other counties that have commercial airports.

**Figure 10. In-state Ticket Purchases<sup>13</sup>**  
(Represented as a Percentage of the Departing Airports Total Enplanement Volumes in 2015)



<sup>13</sup> Airline Reporting Corporation (ARC)