

Airport Profile

Daytona Beach International Airport

Daytona Beach International Airport (DAB) is located in Volusia County, Florida about three miles southwest of Daytona Beach, Florida. This airport is home to the Embry Riddle Aeronautical University flight school as well as many commercial service travelers.

The airport's location within a large city with close highway access makes DAB an ideal airport for tourists and locals alike. DAB is also located adjacent to the Daytona International Speedway as well as Daytona Beach. DAB is able to serve these world-famous tourist destinations with direct service and access to numerous amenities.

Though overall enplanements fell between 2014 and 2015, the total number of enplanements remained strong at 314,700. This is complimented by DAB's high load factor as compared to the national average. DAB continued to serve two domestic destinations in 2015, as it has since 2011.

2015

BY THE NUMBERS

314,700
Enplanements

306,457
Passengers

\$204.69
Average Fare

2
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.

Daytona Beach International Airport Air Service Summary

Introduction

Daytona Beach International Airport (DAB), adjacent to the Embry-Riddle Aeronautical University Daytona Beach Campus, currently has three runways that served 314,700 total enplanements in 2015. The three runways vary in length with one at 3,195 feet, one at 6,001 feet, and the third at 10,500 feet. In the past decade, DAB has seen large fluctuations in total enplanements, peaking in 2007 with 354,826 before falling to a low of 213,065 two years later.

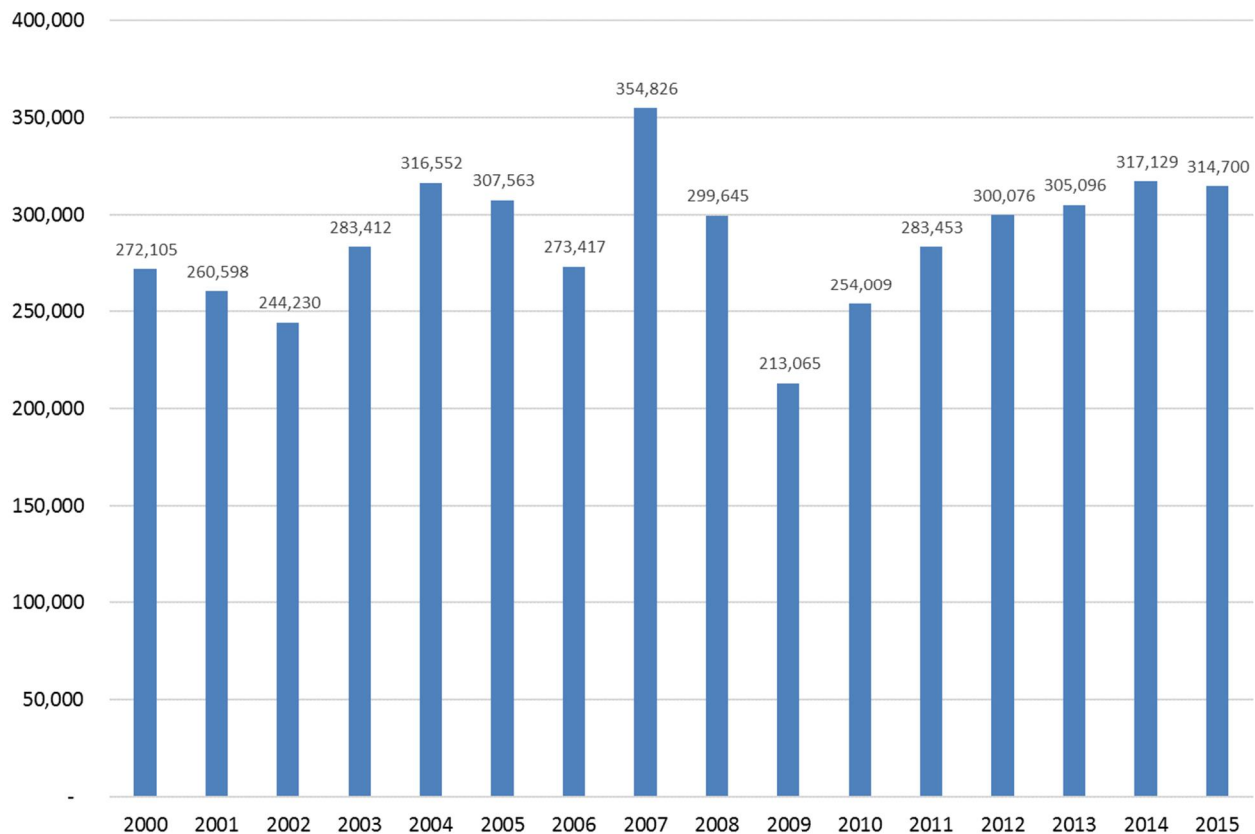
DAB is located in the East Central Continuing Florida Aviation System Planning Process (CFASPP) region and FDOT District five. Also included in this CFASPP region are Melbourne International Airport (MLB), Orlando International Airport (MCO), and Orlando-Sanford International Airport (SFB). This airport profile will provide statistical data about DAB including: annual enplanements, local population data, and many other relevant metrics. The following statistical information will provide a description of the most recent overall performance of DAB and how that compares to previous years' performance.

Figure 1 illustrates annual enplanements at DAB. Following a sharp decline in passenger enplanements during the recession of 2009, DAB has steadily grown in recent years. In 2015, enplanements did decrease slightly to 314,700. Although 2015 yielded a slight decline, it holds relatively steady to the overall incline from 2009.

More information about DAB can be found at: www.flydaytonafirst.com/

Enplanements

Figure 1. Annual Enplanements¹

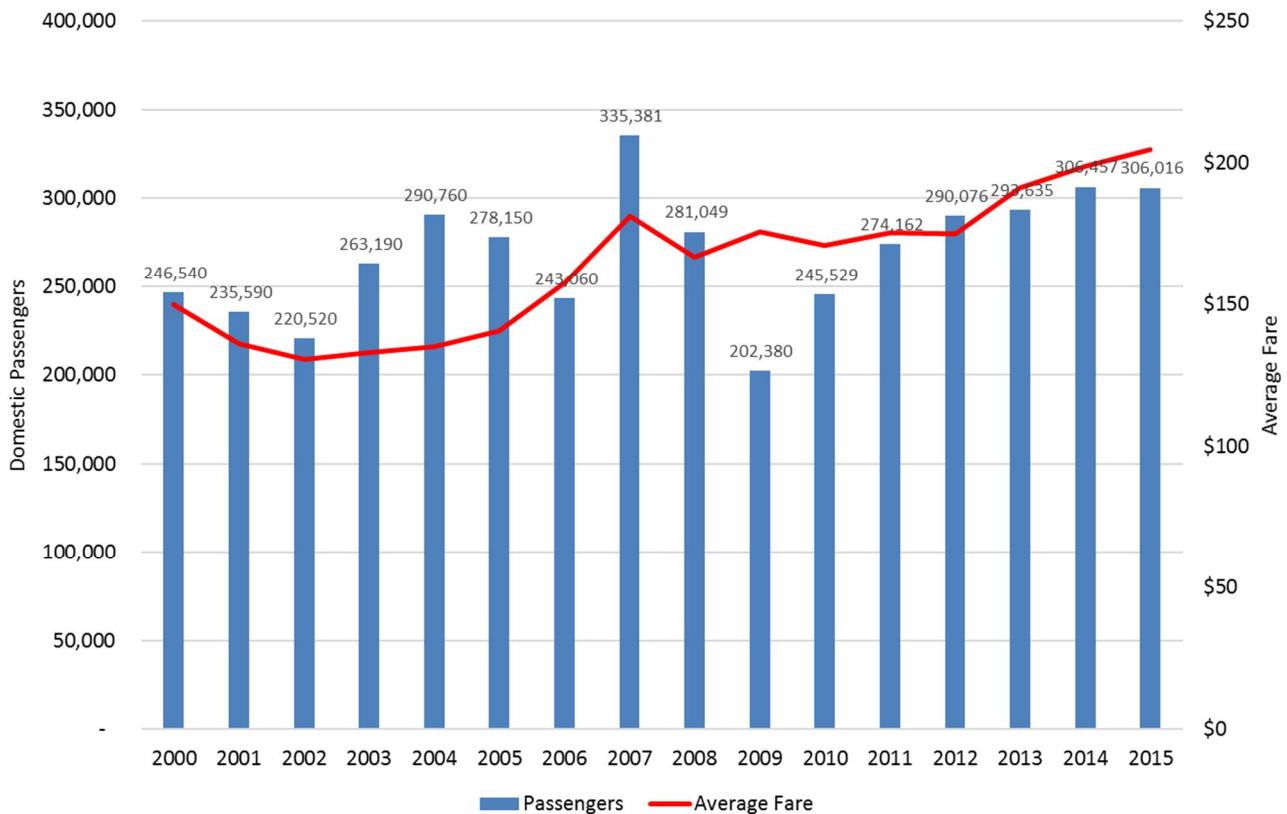


¹ Annual airport passenger traffic reports, provided by FDOT

Passengers and Fares

Daytona Beach International has had a parallel relationship between annual domestic passengers and annual enplanements over the past decade. Since its low point in 2009, DAB has experienced an annual growth trend in domestic passengers as well as the average fare. In 2014, DAB had 306,457 domestic passengers at an average fare of \$204.69. However, in 2015 there was a slight decrease in the number of passengers at 306,016. While this decrease is an interruption in the previous trend of passenger count growth, a loss of 441 passengers is considered a minor decrease in this measurement. Despite the growing passenger count over the past several years, the average fare has been steadily increasing. In 2015, the average fare at DAB was \$204.69. **Figure 2** displays the annual passengers and annual average fare at DAB.

Figure 2. Annual Domestic Passengers and Average Fares²



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

Destination Airports

DAB served two domestic destinations throughout the U.S. with direct flights in 2015. Of the two destinations, one was served by a large jet aircraft and the other was served by a regional jet aircraft. In recent years, there has been a significant increase in the use of large jets which results in an increase of the average number of seats per flight. In fact, DAB had an average 115 seats per flight in 2015. DAB did not serve any destinations within the State of Florida in 2015, although the airport's two destinations were located in the Southeast region of the United States. **Figure 3** displays DAB's domestic destinations.

Domestic Routes

Figure 4 displays DAB'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 DAB) to their final destination. The routes from DAB shown below had the most frequent passengers traveling on them in 2015. Only two of these routes were direct flights: ATL and CLT. The other routes connected through those two airports to then go to their final destination.

The final destination of routes that connected through ATL and CLT included:

- Pittsburgh International Airport (PIT)
- Baltimore-Washington International Airport (BWI)
- Newark Liberty International Airport (EWR)
- LaGuardia Airport (LGA)
- Bradley International Airport (BDL)
- Boston Logan International Airport (BOS)

This analysis shows the intention of the majority of passengers flying out of DAB. It should be noted that each of these airports are in the Northeast region of the U.S. Therefore, the appropriate conclusion is that the majority of passengers who travel through DAB are bound for the Northeast region of the U.S.

2016 AIR SERVICE STUDY

Figure 3. DAB's Domestic Destinations³



³ The Official Airline Guide (OAG)

Figure 4. Domestic Routes⁴

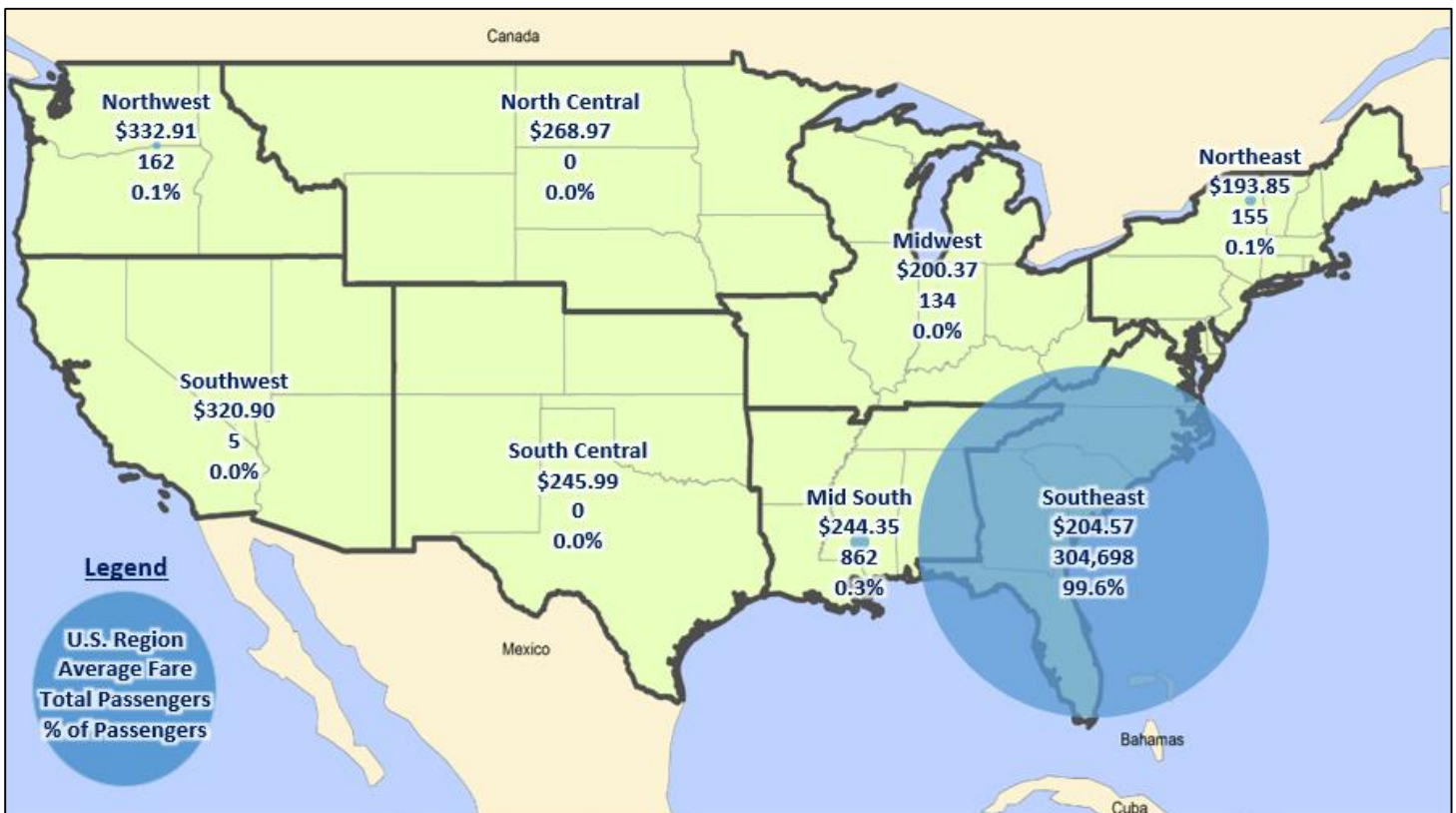


⁴ Airline Reporting Corporation (ARC)

Domestic Regional Analysis

Figure 5 displays the average fare, number of passengers, and percentage of total passengers departing DAB and bound for each of the eight regions of the United States. The data shows that 99.6 percent of passengers departing DAB were bound for destinations in the Southeast region. The Southeast contains both Hartsfield-Jackson Atlanta International Airport (ATL) as well as Charlotte Douglas International Airport (CLT), the two airports that DAB served in 2015. ATL is known for being one of the world's busiest airports as well as the primary hub for Delta Air Lines. Additionally, CLT is the secondary hub for American Airlines. The service to these two airports suggests the primary operation of Delta Air Lines and American Airlines at DAB.

Figure 5. Domestic Passengers and Fares⁵

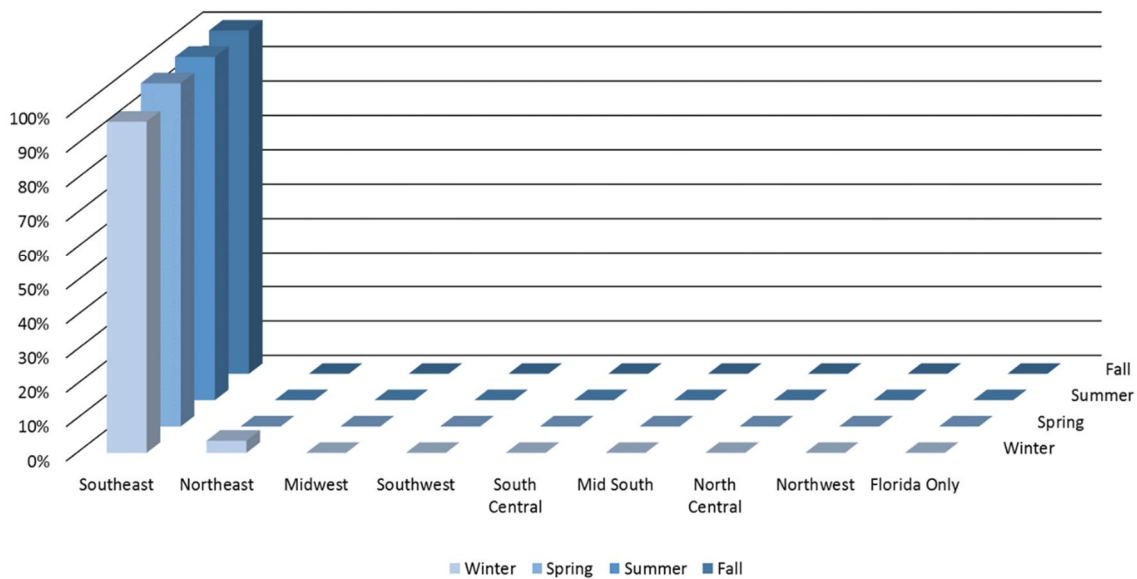


⁵ The Official Airline Guide (OAG)

Seasonal Flight Comparison

The data shown below in **Figure 6** further supports the identification of major routes to ATL and CLT, both of which are in the Southeast. For all four seasons of the year, the majority if not all flights, are bound for the Southeast region of the U.S. This data also shows that in the winter, DAB offers a small percentage of flights to destinations in the Northeast region of the U.S. This slight seasonal difference can potentially be due to the holidays in the winter, which are generally known to increase air travel to and from the Northeast region of the U.S.

Figure 6. DAB Season by Region⁶



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 Daytona Beach International Airport was 88.12, 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 Analysis⁷

Year	Domestic	International	Total
Miami International			
2014	88.55	n/a	88.55
2015	88.12	n/a	88.12
All U.S. Airports			
2014	84.49	81.03	82.69
2015	84.98	80.61	82.68

⁶ The Official Airline Guide (OAG)

⁷ The Bureau of Transportation Statistics (BTS) T-100 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. Daytona Beach International shipped 120,477 pounds of freight in 2015, roughly 7,000 pounds less than 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. DAB Freight⁸

Year	Freight (in pounds)
2014	127,948
2015	120,477

On-Flight Market Mail Statistics

Mail statistics represent the total number of pounds of U.S. and foreign mail shipped from a given airport. DAB has had a very small presence in the air mail industry. 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. DAB Mail⁹

Year	Mail (in pounds)
2014	5
2015	0

⁸ The Bureau of Transportation Statistics (BTS) T-100 Segment Data

⁹ 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 over 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 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. DAB is the only commercial service airport in the Deltona-Daytona Beach-Ormond Beach MSA.

Drive Time and Population Analysis

Figure 7 displays the area around DAB that can access the airport with a 90-minute or less drive

Figure 7. 90 Minute Drive Time Area¹¹

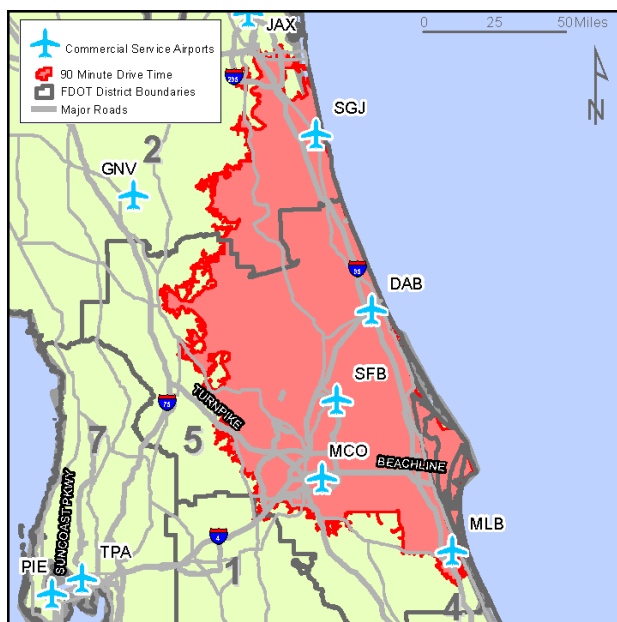


Table 4. 90 Minute Drive Time Analysis¹⁰

Population Trends	
2010 Total Population	3,616,355
2016 Total Population	3,942,917
2021 Total Population	4,255,255
2040 Total Population	5,685,070
2016-2021 Annual Rate of Change*	1.54%
2016-2040 Percent Change	44%

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 1.54 percent. With this growth rate, this area is expected to have a 44 percent growth in population by the year 2040. Therefore, by the year 2040, it is anticipated that 5,685,070 people will have a 90 minute or less drive time from their homes to DAB.

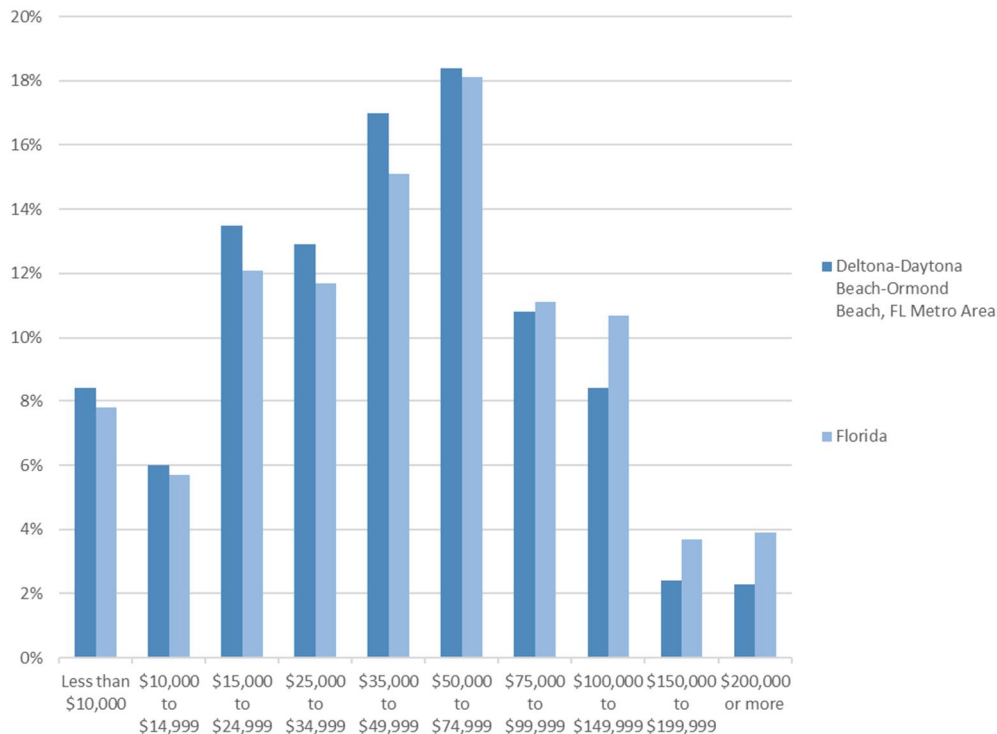
¹⁰ U.S. Census Bureau, Census 2010 Summary – ESRI Housing Profile

¹¹ U.S. Census Bureau, Census 2010 Summary – ESRI Housing Profile

Income Levels

The income distribution in the Deltona-Daytona Beach-Ormond Beach MSA has higher percentages of people with \$50,000 - \$74,999 salaries or less than the average for the state of Florida. 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 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 8** below. Income data for the MSA and State was derived from the US Census American Fact Finder.

Figure 8. MSA and Florida Income Comparison¹²



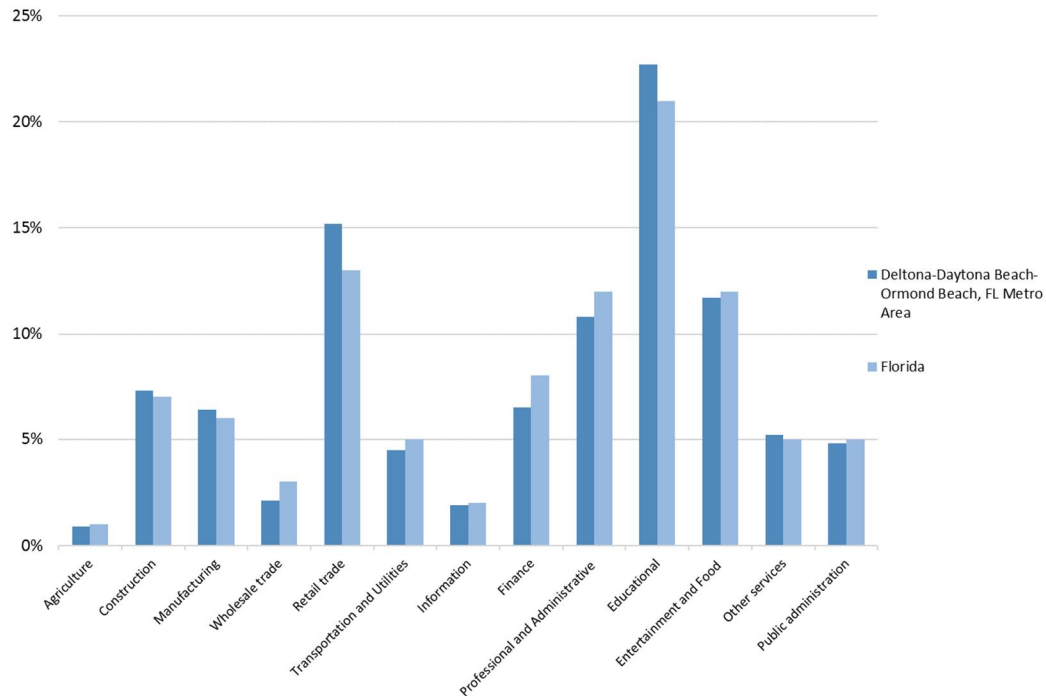
Employment

The primary types of employment located in an area may have an effect on 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. Miami-Dade County, in all reported categories, is at the state average for employment by industry group. A summary of employment by industry can be seen in **Figure 9**.

¹² U.S. Census American Fact Finder

2016 AIR SERVICE STUDY

Figure 9. Employment by Industry¹³



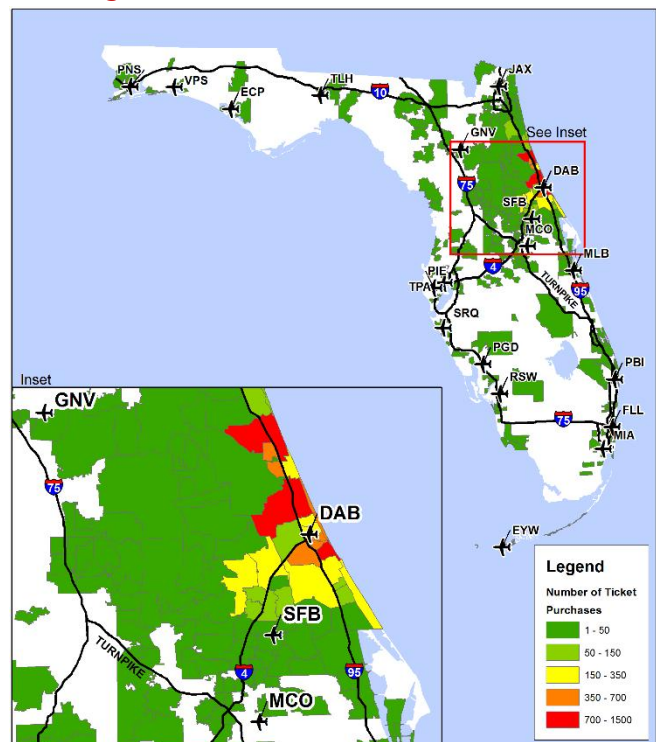
Leakage

Figure 10 displays the areas in Florida where tickets for flights departing from DAB were purchased. This graphic shows the purchases of tickets primarily in the area surrounding DAB. However, tickets have been purchased for DAB flights all over the state of Florida. Some areas with noticeable aggregations of ticket purchases include Jacksonville, Tallahassee, and Melbourne. The majority of tickets purchased for DAB flights were purchased from in-state locations. However, 45 percent of ticket purchases were from out-of-state locations. The other states where ticket purchases were made included but aren't limited to:

- New York – 6%
- Ohio – 4%
- Pennsylvania – 3%
- Massachusetts – 2%

As shown in **Figure 10**, Daytona Beach International Airport serves passengers from the Volusia County market area, but does not attract many passengers from the primary markets of other commercial airports. Based on the market

Figure 10. In-state Ticket Purchases¹⁴

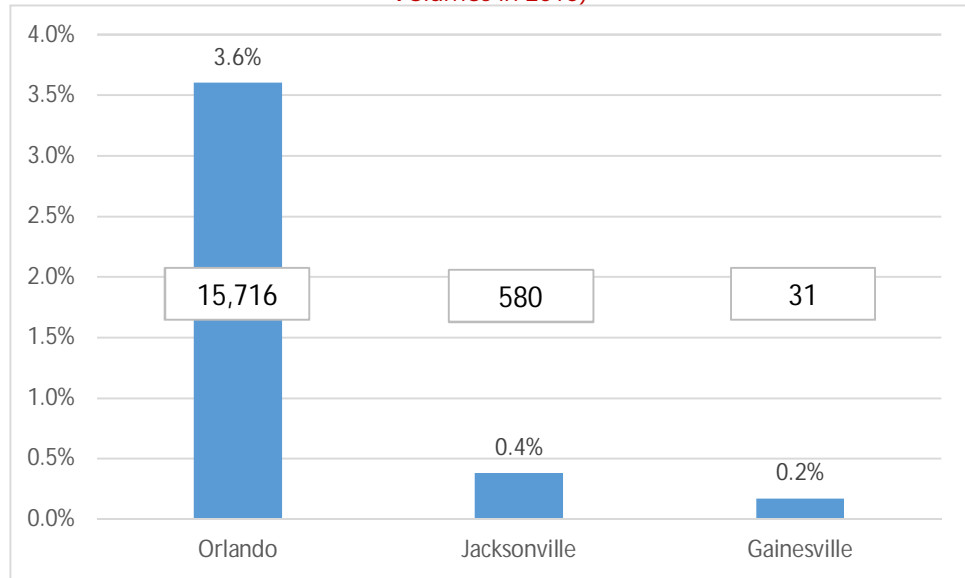


¹³ U.S. Census American Fact Finder

¹⁴ Airline Reporting Corporation (ARC)

leakage analysis, 3.6 percent (15,716) of passengers departing from Orlando International Airport were from Volusia County. This analysis shows that Daytona Beach International Airport market is leaking a significant number of passengers to other nearby airports. **Figure 11** illustrates three of the top airports that receive leaked passengers from Daytona Beach International Airport. The values that are presented represent the number and percent of passengers who purchased their ticket from a Volusia County zip code but flew out of an alternative airport. Data presented are from a 10 percent sample from all months of 2015.

Figure 11. In-state Ticket Purchases¹⁵
(Represented as a Percentage of the Departing Airports Total Enplanement Volumes in 2015)



¹⁵ Airline Reporting Corporation (ARC)