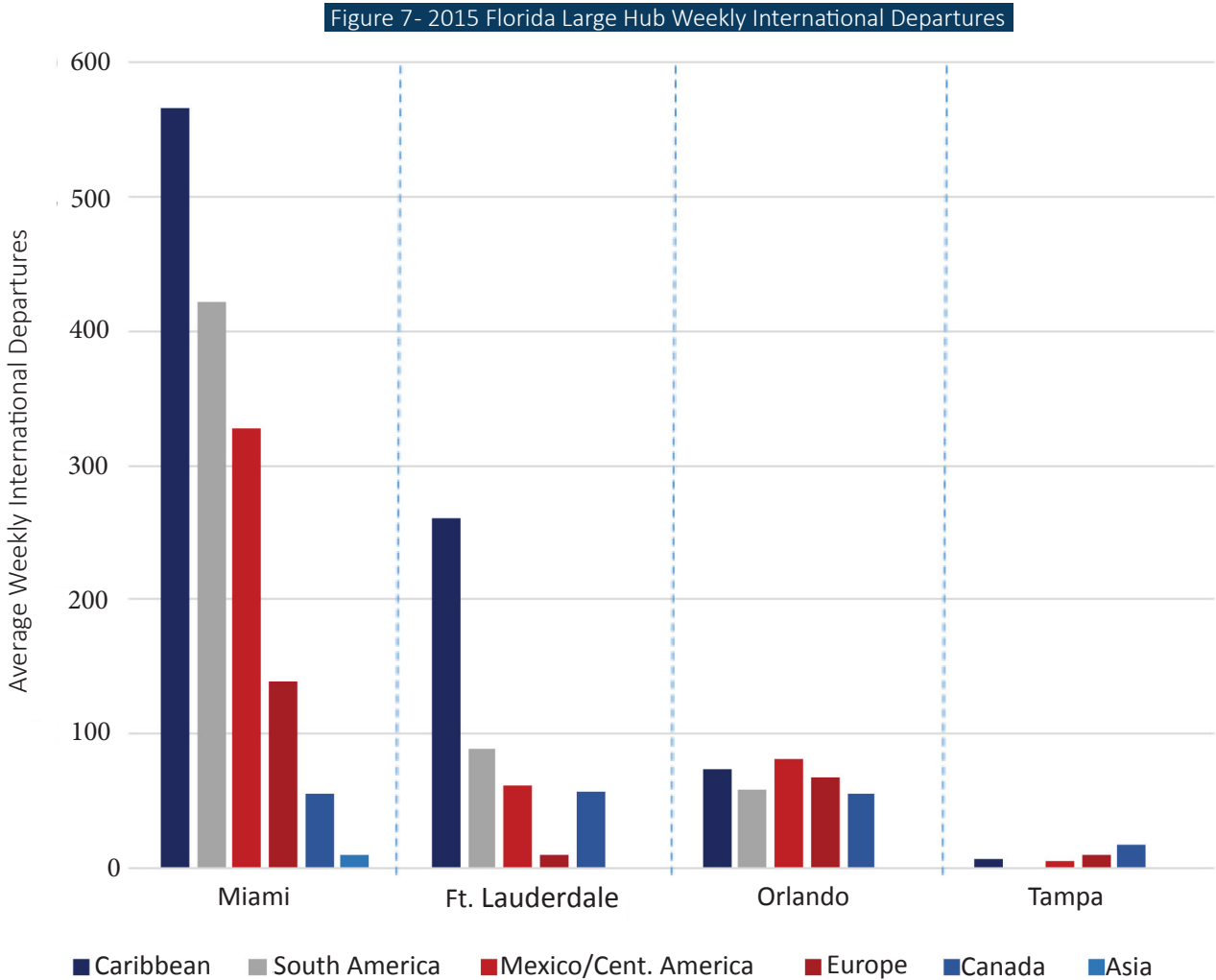


INTERNATIONAL SERVICE AT FLORIDA LARGE HUBS

Figure 7 illustrates the number of international flights to their corresponding destinations for each of Florida’s four large hub airports. Miami led the State in international flights again 2015, remaining consistent with all previous versions of this report. These four airports are considered major contributors to Florida’s success in international air service. Orlando was the only large hub airport with more scheduled weekly service to Mexico/Central America than any of the other international destinations. Further, Tampa was the only large hub airport with more service to Canada than any of the other international destinations.



CONCLUSION

The data reported in the 2016 Air Service Study justifies the notion that Florida’s commercial air service is increasing in demand and operations on an annual basis. Increasing trends can be identified across all facets of this study and are expected to continue into the future. The continued success of the Florida aviation industry is an exciting and noteworthy accomplishment credited to all 20 commercial service airports in Florida.

Prepared for the Florida
Department of Transportation
Aviation and Spaceports Office
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2016
AIR SERVICE STUDY



PURPOSE AND OVERVIEW

This study was developed to evaluate the current state of Florida’s aviation industry in comparison to historical trends and data. The purpose of the evaluation was to provide the Florida Department of Transportation (FDOT) and Florida’s 20 commercial service airports with accurate summary data for use in progressing Florida’s aviation industry.

The 2016 Air Service Study utilizes data from trusted industry sources such as The Official Airline Guide and the United States Department of Transportation’s Bureau of Transportation Statistics to provide FDOT and its commercial service airports with the most current information possible. By comparing current and historical data, trends and major changes in commercial service at Florida’s airports were identified and reported.

For organizational purposes, this report categorizes Florida airports into their respective FDOT Districts, as shown in Figure 1.

Figure 1- Commercial Service Airports by FDOT District

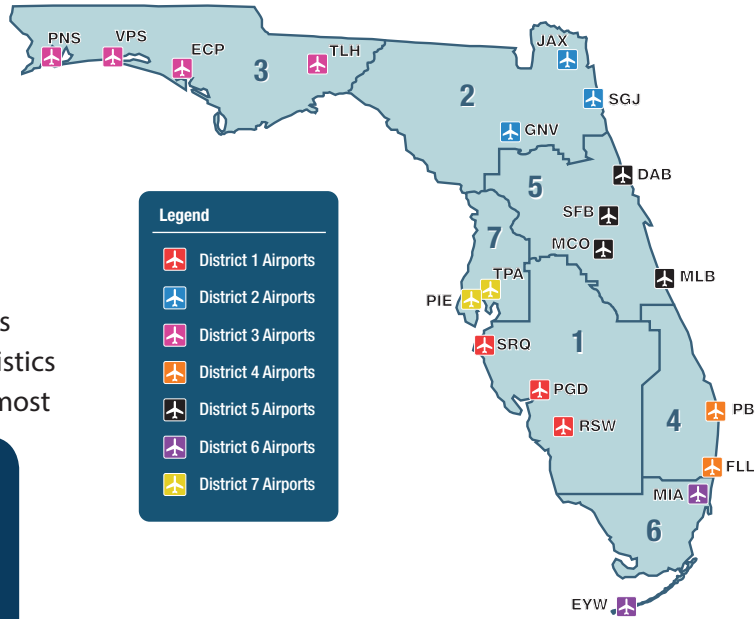
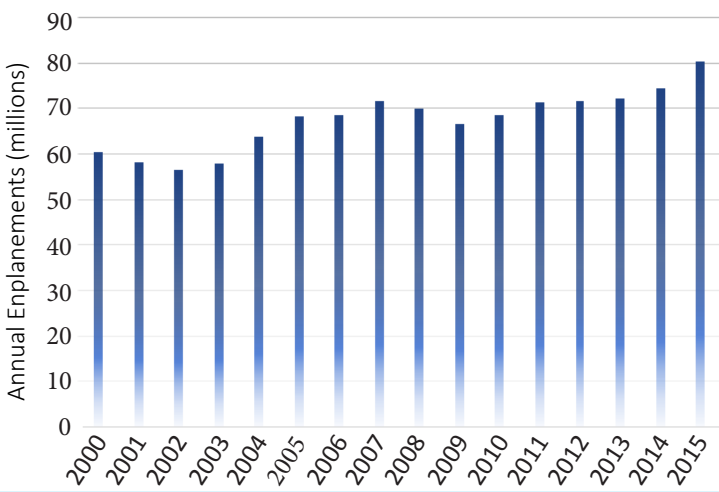


Figure 2- 2015 Total Enplanements from Florida Airports



ENPLANEMENT TRENDS

Figure 2 displays the continued trend of growing annual enplanements from Florida in 2015. As shown, 2015 yielded the highest level of annual enplanements from Florida airports in recorded history at just above 80 million. The increasing trend in annual enplanements has steadily grown since the large decrease reported between 2007 and 2009. Overall, this growing trend speaks volumes to the current success and operational efficiency of Florida’s commercial service airports and transportation systems.



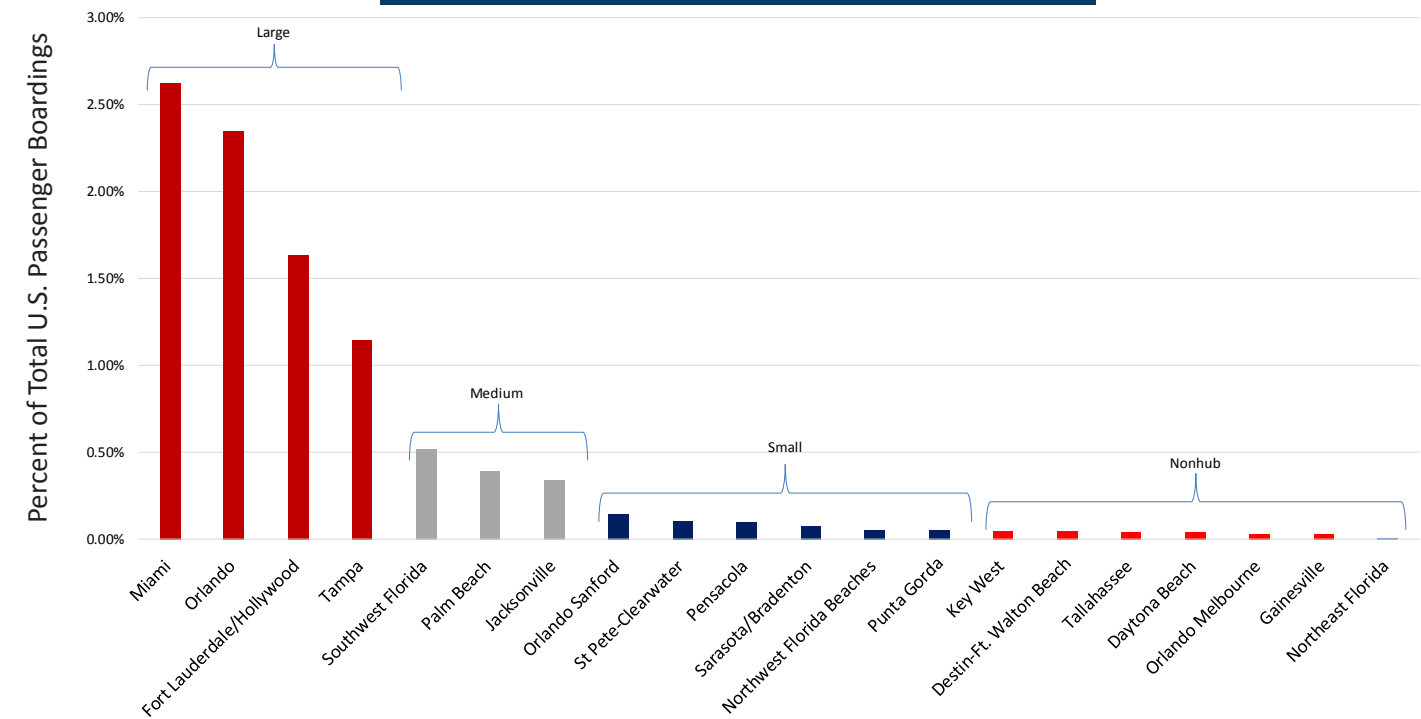
FLORIDA'S CURRENT AIR SERVICE

Figure 3 displays Florida's commercial service airports by their respective Federal Aviation Administration (FAA) hub size (large, medium, small, and non). Further, the figure shows the percentage of U.S. annual passenger boardings at each airport. Collectively, Florida airports comprise nearly ten percent of all U.S. passenger boardings. This number is enhanced by the four large hub airports in Florida, which account for nearly 8 percent of total passenger boardings in the U.S.

As shown, Miami International had the highest-percentage of U.S. passenger boardings at 2.63 percent, followed closely by Orlando International at 2.35 percent of annual passenger boardings in 2015.

Since the 2013 Air Service Study, Northeast Florida (SGJ) in St. Augustine has been added as an airport with commercial service. Representation of scheduled commercial service to SGJ is included in this report. The addition of SGJ presents new opportunities for Florida's growing aviation industry.

Figure 3- 2015 Percentage of U.S. Passenger Boardings by Airport



TRAVEL PATTERNS AND FARES

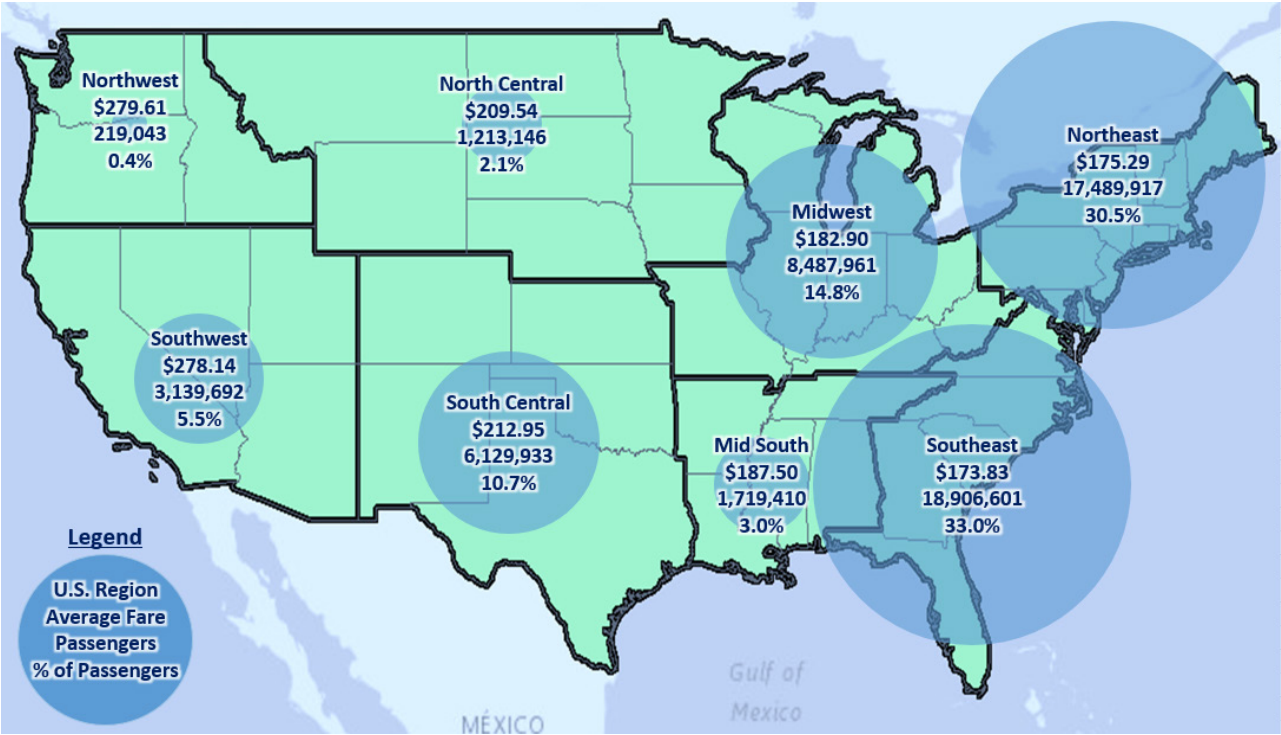
The success and growth of Florida aviation is a trend that has maintained steadiness throughout each edition of this report. Florida's growing air travel can be attributed to multiple factors including major amusement parks, numerous beaches, and other tourist destinations.

In 2014, for the majority of airports in Florida, the top travel destinations were cities in the Southeastern U.S., as seen in Figure 4 on the following page. The overall top destination for flights departing Florida airports was Atlanta, Georgia. In 2014, cities located within the Northeast and Midwest ranked as the second-and third-most heavily traveled

destinations for Florida's domestic flights. The least traveled to region of the U.S. from Florida is the Northwest region (Alaska, Washington, Oregon, and Idaho).

Florida's average annual one-way domestic fares have steadily been below the national average for the last decade. The average one-way fare paid by all domestic passengers originating in Florida increased from \$180.77 in 2012 to \$192.96 in 2014. The national average one-way fare paid by all U.S. passengers traveling domestically was \$217.43 in 2014.

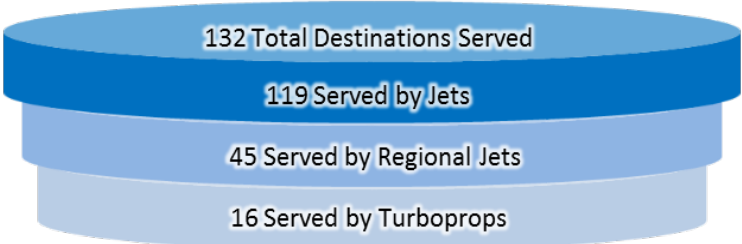
Figure 4- 2015 Travel Patterns and Average Fares



EQUIPMENT TYPE

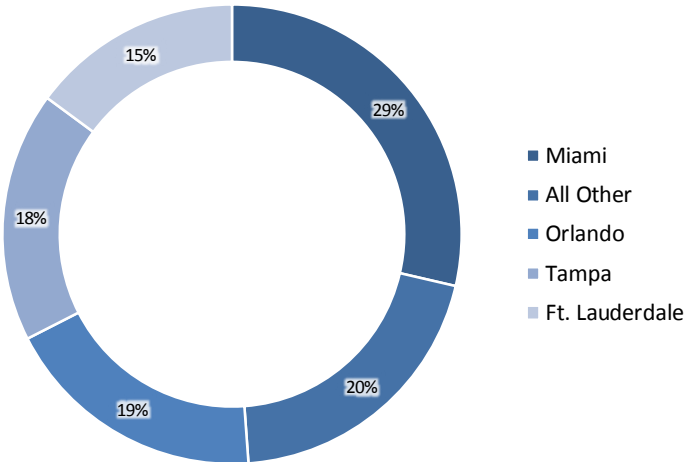
When all seats that departed Florida airports each week to domestic locations were considered, approximately 91-percent of those seats were on jet aircraft. This level has remained virtually unchanged since 2000. In the summer of 2015, the average number of seats-per-flight increased to 135, up slightly from 2013 when there was an average of 130 seats per flight. This seats-per-departure figure remained notably higher than 2000 levels (107 seats per flight). Figure 5 depicts the breakdown of Florida equipment type by number of destinations served.

Figure 5- 2015 Equipment Type by Destinations



The aircraft classifications used in this document include large jets (turboprop aircraft with more than 70 seats, sometimes referred to as "jets"), regional jets (turboprop aircraft with fewer than 70 seats, typically referred to as RJs), and turboprops (propeller-driven aircraft of all sizes, typically smaller than 50 seats).

Figure 6- 2015 Intrastate Service



INTRASTATE SERVICE

In addition to scheduled service to national domestic destinations, several of Florida's commercial airports also have nonstop service to intrastate destinations. Specifically, seven percent of Florida's 2015 service was to other airports within the State. Figure 6 shows the percentages of destinations receiving intrastate service. As shown, the large hub airports received the majority of intrastate travel, with Miami receiving nine percent more than all other airport sizes combined.