

Airport Profile

Tampa International Airport

Tampa International Airport (TPA) is located in Hillsborough County, Florida about six miles west of downtown Tampa. The airport has a central terminal connected by people movers to satellite terminals.

Tampa is well-known for its diverse cultural features and existence of many coastal amenities and a business-friendly atmosphere. Home to a National Football League team as well as a National Hockey League team, travelers come from around the country to attend events. Tampa is also home to several universities including the University of South Florida and the University of Tampa. Having such diverse culture and so many amenities to offer, TPA makes a great access point for commercial tourism and air travelers

TPA's trend of increasing passengers and enplanements continued in 2015. Being one of Florida's four large hub airports, TPA's growth is consistent with the national trend of increasing demand for large hub air travel.

2015

BY THE NUMBERS

9,427,445
Enplanements

8,834,166
Passengers

\$170.60
Average Fare

64
U.S. Cities Served

8
Intrastate
Destinations

40
Weekly International
Departures



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.

Tampa International Airport Air Service Summary

Introduction

Beginning operations as Drew Field Municipal Airport in 1920 and officially beginning commercial service in 1971, Tampa International Airport (TPA) was the fourth busiest airport in Florida in 2015. The airport has three runways measuring 6,999 feet, 8,300 feet, and 11,002 feet in length. Although the airport has seen fluctuations in total enplanements throughout the last decade, largely due to the Great Recession, annual enplanements have been steadily increasing since 2010. The airport's location in a large metro area with limited commercial service competition could mean sustainable growth for TPA in the future.

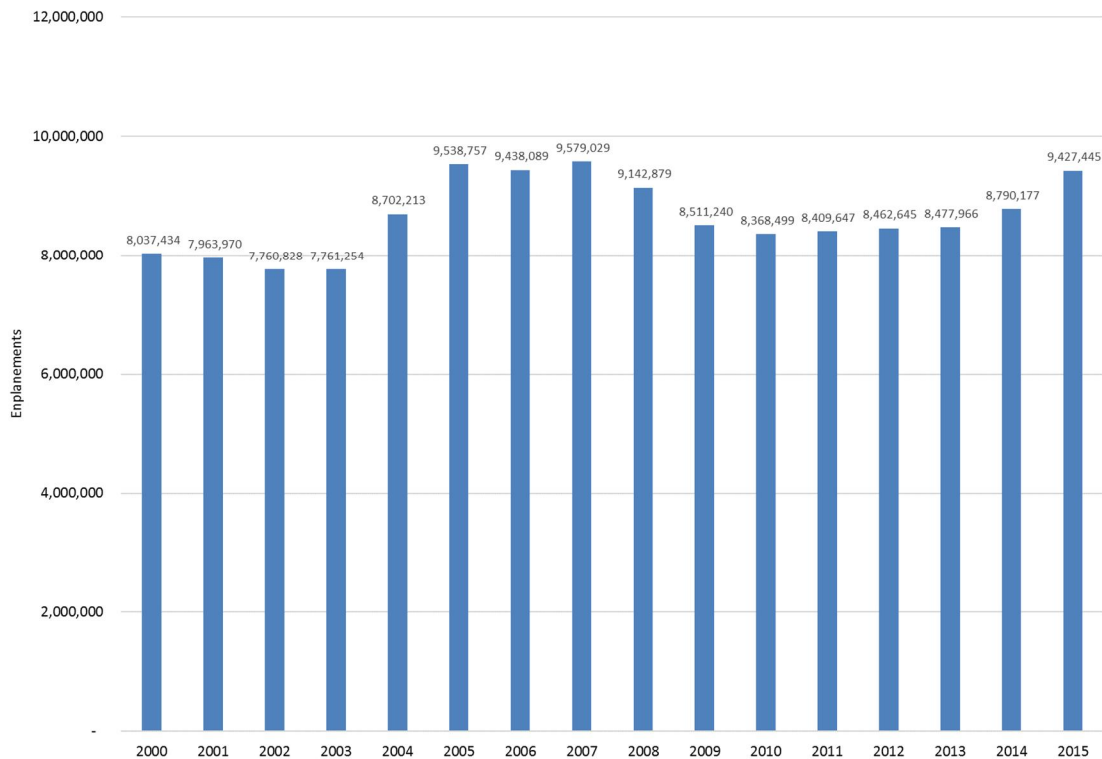
TPA is located in the West Central Continuing Florida Aviation System Planning Process (CFASPP) region and FDOT District Seven. Also included in this region is St. Petersburg-Clearwater International Airport (PIE). This airport profile will illustrate statistical data about FLL including: annual enplanements, local population data, and many other metrics. The following statistical information will provide a description of the most recent overall performance of TPA and how that compares to previous years' performance.

More information about TPA can be found at: <http://www.tampaairport.com/>

Enplanements

Figure 1 below is a chart representing total annual enplanements between 2000 and 2015. This analysis shows that TPA had a sharp increase in annual enplanements in 2015 at 9,427,445. Although this number was a seven percent increase from 2014 enplanements, it did not breach the all-time-high reported in 2007.

Figure 1. Annual Enplanements¹



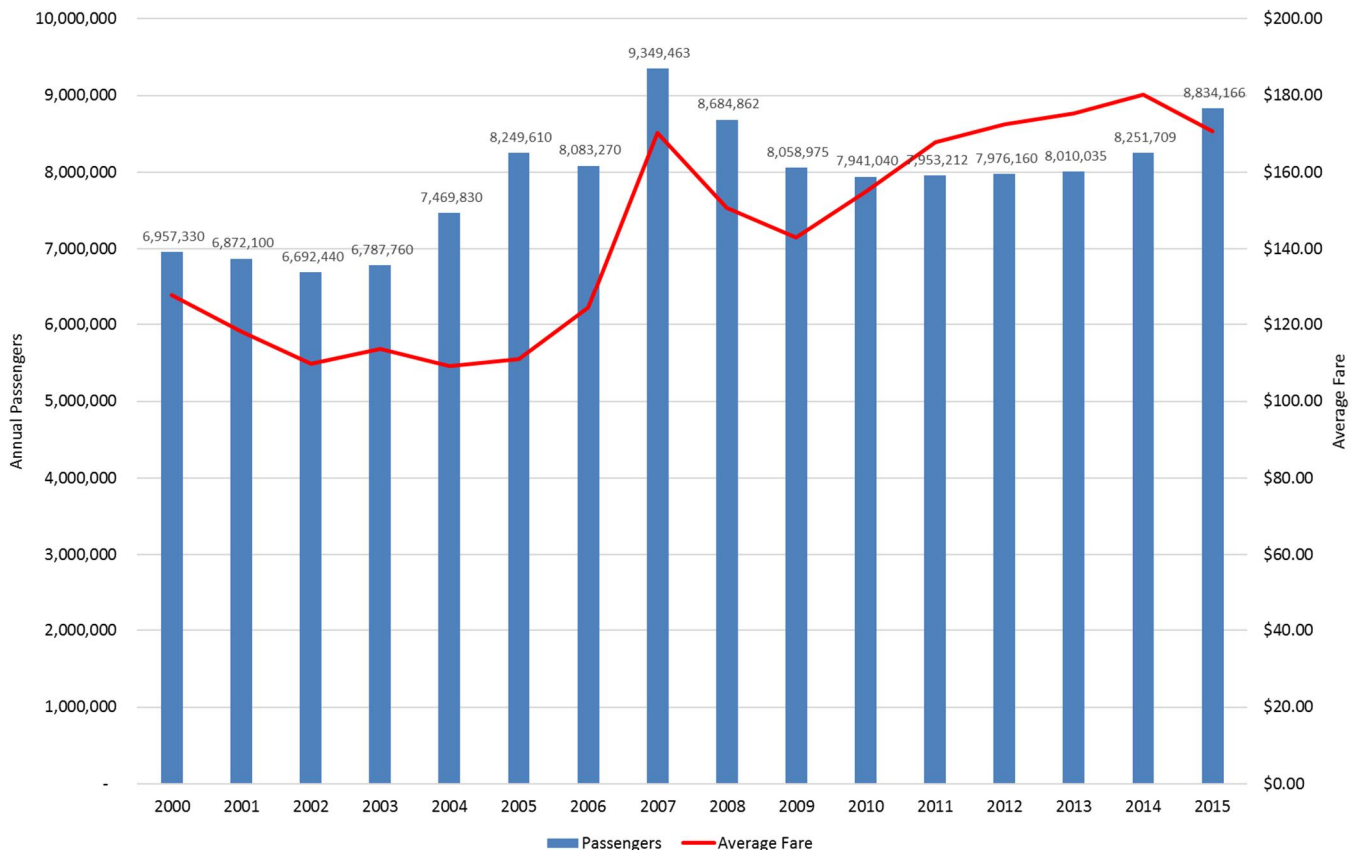
¹ Annual airport passenger traffic reports, provided by FDOT

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Passengers and Fares

Tampa International Airport (TPA) saw its highest passenger count in 2015 at 8,834,166 passengers. The 2015 count came in at roughly 600,000 more passengers than 2014. In concert with the increase in annual passengers, the average annual fare decreased to \$170.60 in 2015, a \$10 difference from 2014. The higher passenger volume and decreased fare could, among other things, be attributed to the trend of increasing load factor on commercial airline flights. **Figure 2** displays the annual passengers and annual average fare at TPA.

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

TPA served 64 destinations in the U.S. in 2015. Eight of these destinations were located within the state of Florida. These locations included:

- Fort Lauderdale-Hollywood International Airport (FLL) – 70 average flights per week
- Miami International Airport (MIA) – 41 average flights per week
- Key West International Airport (EYW) – 26 average flights per week
- Jacksonville International Airport (JAX) – 17 average flights per week
- Pensacola International Airport (PNS) – 13 average flights per week
- Tallahassee International Airport (TLH) – 12 average flights per week
- Palm Beach International Airport (PBI) – 12 average flights per week
- Northwest Florida Beaches International Airport (ECP) – 7 average flights per week

Of flights departing from TPA, the destination receiving the most weekly flights was Hartsfield-Jackson Atlanta International Airport (ATL). ATL is known as being one of the busiest airports in the world as well as being the primary hub for Delta Air Lines. Regardless of the high number of flights bound for ATL (152 per week), TPA still served destinations all over the U.S. Some destinations of note that received a large amount of weekly service from TPA included:

- Charlotte Douglas International Airport (CLT) – 63 average flights per week
- Ronald Reagan Washington National Airport (DCA) – 61 average flights per week
- Dallas Fort Worth International Airport (DFW) – 53 average flights per week
- John F. Kennedy International Airport (JFK) – 52 average flights per week

These destinations represent large amounts of TPA flights that service major large hub airports across the U.S. in addition to their medium and small hub counterparts. These frequent direct flight offerings make TPA an ideal airport for passengers traveling to a variety of major airports around the country.

Figure 3 displays the domestic destinations served by TPA.

Domestic Routes

Figure 4 displays TPA'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 TPA) to their final destination. The routes from TPA shown below had the most frequent passengers traveling on them in 2015. All ten of the following routes were direct flights. The final destinations include:

- Chicago O'Hare International Airport (ORD)
- Ronald Reagan Washington National Airport (DCA)
- Newark Liberty International Airport (EWR)
- John F. Kennedy International Airport (JFK)
- LaGuardia Airport (LGA)
- Philadelphia International Airport (PHL)
- Dallas Fort Worth International Airport (DFW)
- Washington Dulles International Airport (IAD)
- Boston Logan International Airport (BOS)
- Miami International Airport (MIA)

This analysis represents the intention of the majority of passengers flying out of TPA. 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 TPA are bound for those regions of the U.S. This conclusion is further supported from data analysis previously displayed in this profile.

Figure 3. Domestic Destinations³



³ The Official Airline Guide (OAG)

Figure 4. Top Domestic Routes⁴

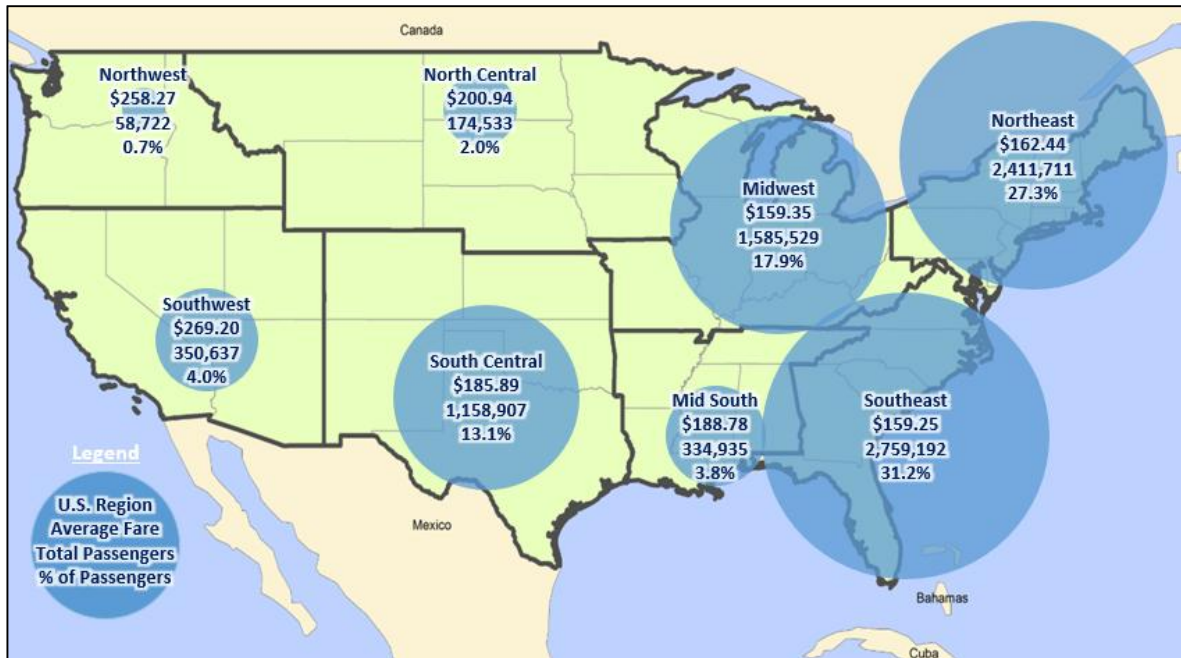


⁴ Airline Reporting Corporation (ARC)

Domestic Regional Analysis

Figure 5 displays the average fare, number of passengers, and percentage of total passengers departing TPA and bound for each of the eight regions of the United States. The data shows that 27.3 percent of passengers were bound for the northeast region. This region contains several large hub airports that were identified above as receiving a large amount of TPA's 2015 flights. The southeast region (including Florida) received the most passengers from TPA in 2015 at 31.2 percent. This region contains Atlanta Hartsfield-Jackson International Airport (ATL) which received a large portion of TPA service in 2015. Additionally, this figure incorporates other airports within the state of Florida, of which TPA served eight, into the southeastern region.

Figure 5. Domestic Passengers and Fares⁵



International Flight Departures

TPA had an average 40 weekly departing flights bound for international destinations. 18 of the weekly flights were bound for Toronto, Canada, the top international destination of flights departing TPA. Following the flights to Toronto, 10 weekly flights were bound for European destinations, seven weekly flights were bound for Caribbean destinations, and five weekly flights were bound for destinations in Mexico/Central America. **Table 1** displays all of TPA's international destinations in 2015, as well as their average flights per week from TPA.

Table 1. Average Load Factor Analysis¹

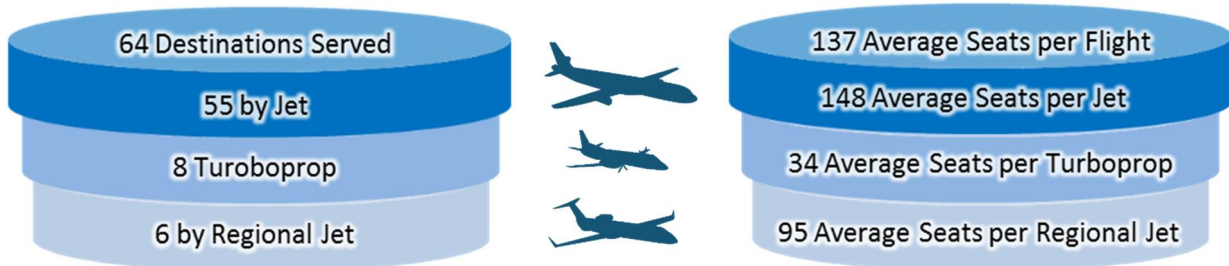
Canada	18
Toronto, Canada	18
Europe	10
London, England	7
Zurich, Switzerland	3
Caribbean/Atlantic	7
Grand Cayman Island, West Indies	5
Marsh Harbour, Bahamas	2
Mexico/Central America	5
Panama City, Panama	4
Cancun, Mexico	1

⁵ The Official Airline Guide (OAG)

Aircraft Type

Of the 64 destinations served by TPA, 55 were served by large jet aircraft, eight by turboprop aircraft, and five by regional 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 flights. **Figure 6** displays the aircraft types that served the 64 destinations from TPA as well as the average seats per flight on each aircraft type.

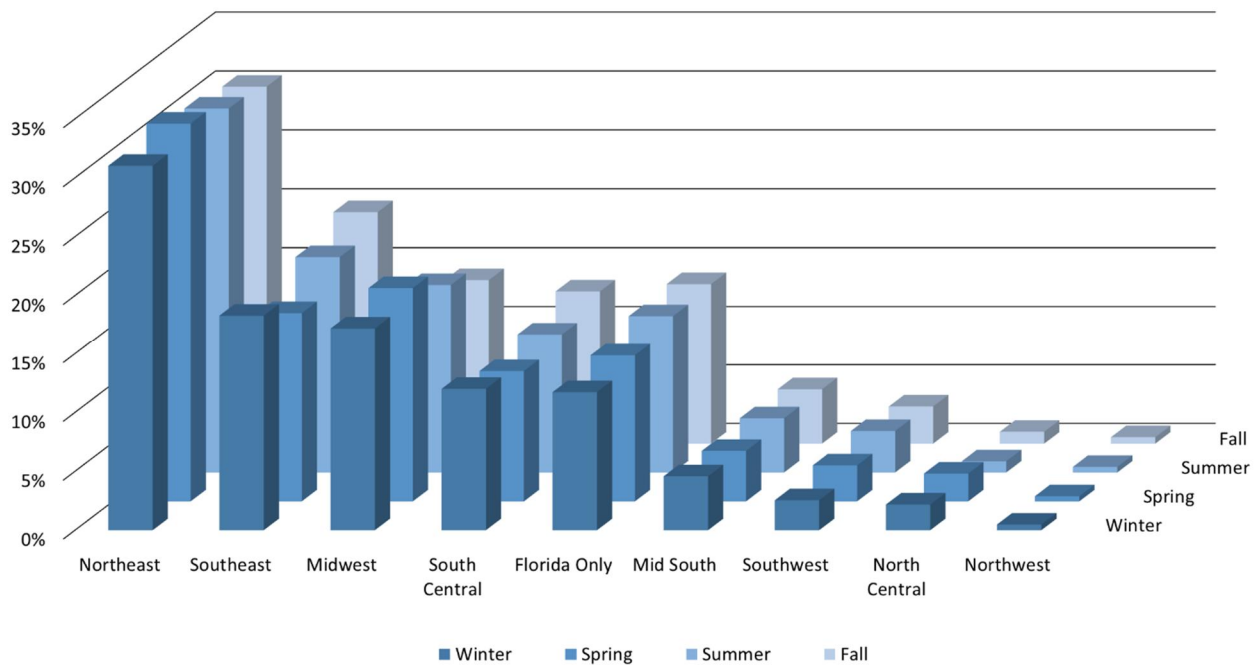
Figure 6. Aircraft Types and Average Seats per Flight⁶



Seasonal Flight Comparison

The data shown below in **Figure 7** further supports the identification of primary service to the northeast region. For all four seasons of the year, the majority of flights, were bound for the northeast region of the U.S. Further, this data shows the high impact TPA's intrastate flight service has on the overall southeastern flight percentages. When separated from the southeast region, service to Florida airports ranks fifth overall, behind the south central region. However, service to Florida airports surpasses service to both the Midwest and south central regions in the Fall.

Figure 7. Season by Region Analysis⁷



⁶ The Official Airline Guide (OAG)

⁷ The Official Airline Guide (OAG)

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 TPA was 84.87 in 2015, which was higher than the U.S. average, 82.68. 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 2**.

Table 2. Average Load Factor Analysis⁸

Year	Domestic	International	Total
Tampa International			
2014	84.69	77.59	84.07
2015	85.77	76.50	84.87
All U.S. Airports			
2014	84.49	81.03	82.69
2015	84.98	80.61	82.68

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, TPA shipped 95,214,108 pounds of freight, a roughly ten-million-pound increase from 2014. A summary of 2014 and 2015 on-flight market freight statistics is shown in **Table 3**. Freight statistics were derived from the Bureau of Transportation Statistics (BTS) T-100 segment data for the years 2014 and 2015.

Table 3. TPA Freight⁹

Year	Freight (in pounds)
2014	85,128,798,
2015	95,214,108

On-Flight Market Mail Statistics

Mail statistics represent the total number of pounds of U.S. and foreign mail shipped from a given airport. TPA experienced an increase in 2015 throughput mail. A summary of 2014 and 2015 on-flight market mail statistics is shown in **Table 4**. Mail statistics were derived from the Bureau of Transportation Statistics (BTS) T-100 segment data for the years 2014 and 2015.

Table 4. TPA Mail¹⁰

Year	Mail (in pounds)
2014	4,484,522
2015	5,572,549

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

⁹ The Bureau of Transportation Statistics (BTS) T-100 Table Data

¹⁰ 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. TPA is one of two commercial service airports located in the Tampa-St. Petersburg-Clearwater MSA.

Drive Time and Population Analysis

Figure 8 displays the area around TPA that can

Figure 8. 90 Minute Drive Time Analysis¹²

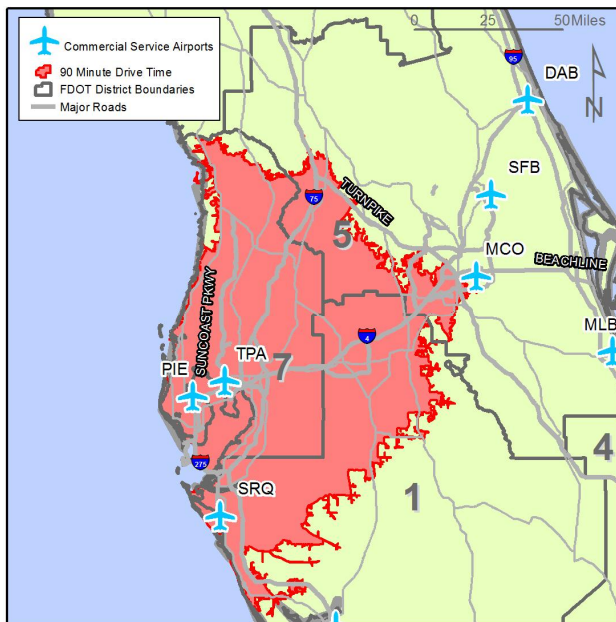


Table 5. Population Within 90 Minutes¹¹

Population Trends	
2010 Total Population	4,393,887
2016 Total Population	4,734,009
2021 Total Population	5,072,960
2040 Total Population	6,597,576
2016-2021 Annual Rate of Change	1.39%
2016-2040 Percent Change	39%

access the airport with a 90-minute or less drive time. Further, **Table 5** 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 1.39 percent. With this growth rate, this area is expected to have a 39 percent growth in population by the year 2040. Therefore, by the year 2040, it is anticipated that 6,597,576 people will have a 90 minute or less drive time from their homes to

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

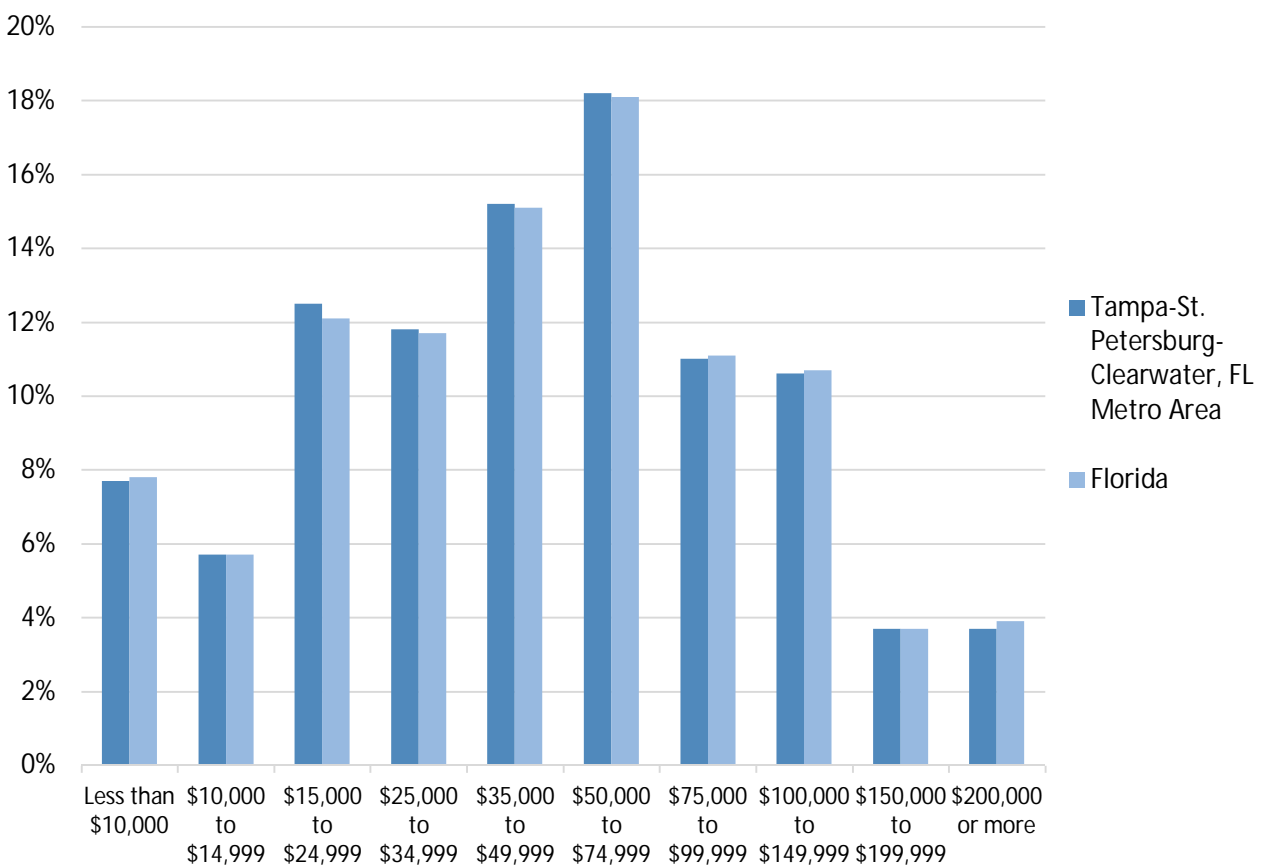
¹² U.S. Census Bureau, Census 2010 Summary – ESRI Housing Profile

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

Income Levels

The income distribution in the Miami-Fort Lauderdale-Pompano Beach 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 9** below. Income data for the MSA and State was derived from the US Census American Fact Finder.

Figure 9. MSA and Florida Income Comparison¹³



Employment

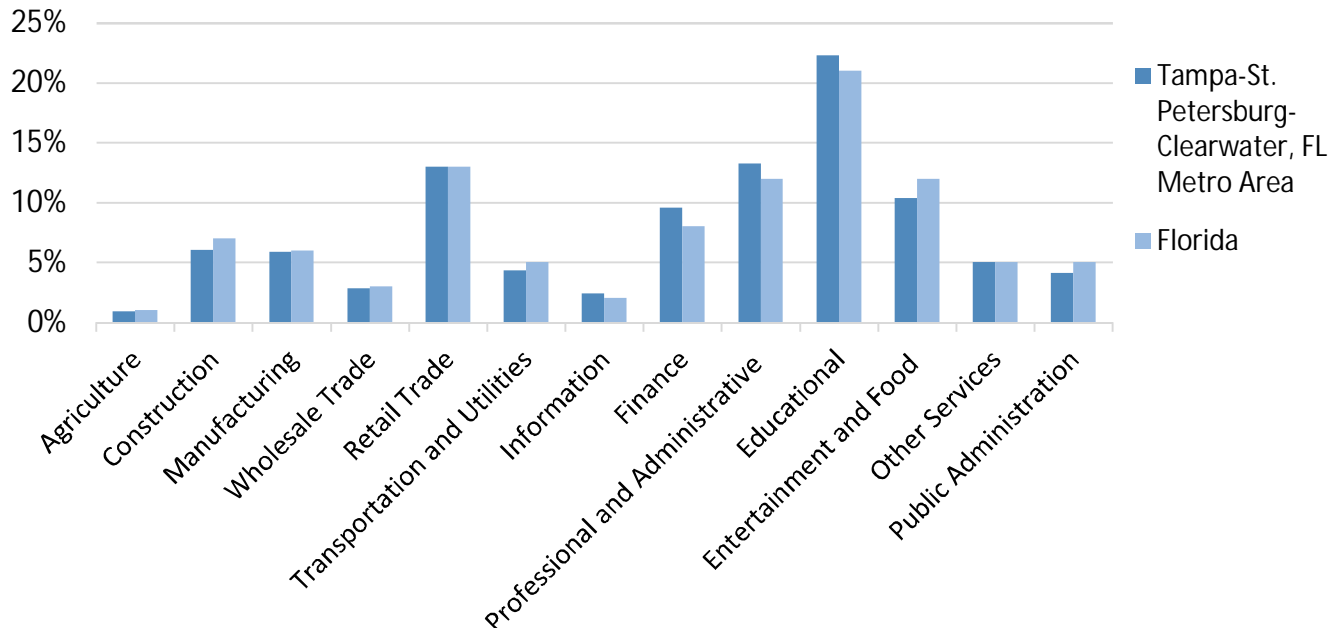
The primary types of employment located in an area may influence air travel. For areas that have a large number of companies that participate in professional and financial services, demand for local air travel will likely increase because they are less concerned about the cost of flights and more concerned 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

¹³ U.S. Census American Fact Finder

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industry percentages. A summary of employment by industry can be seen in **Figure 10** below. As shown, MSA 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 10. Employment by Industry¹⁴

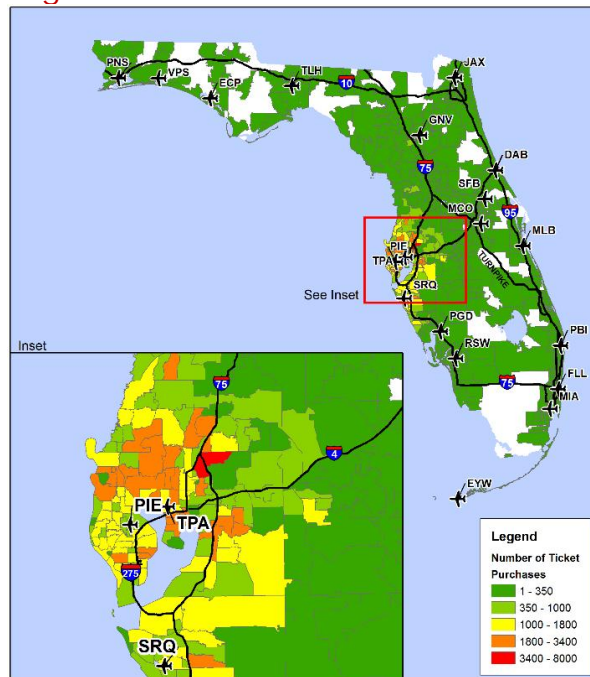


Market Leakage

Figure 11 displays the zip codes in Florida where tickets for flights departing from TPA were purchased. This graphic shows the purchases of tickets primarily in the area surrounding TPA. However, tickets have been purchased for TPA flights from all over the state of Florida. Tickets for flights departing from TPA are purchased from the majority of zip codes in the state of Florida. However, 32 percent of tickets purchased for TPA flights were purchased from out of state locations. Other states where tickets were purchased include:

- New York – 4%
- California -2%
- New Jersey – 2%
- Illinois – 2%

Figure 11. In-state Ticket Purchases¹⁵

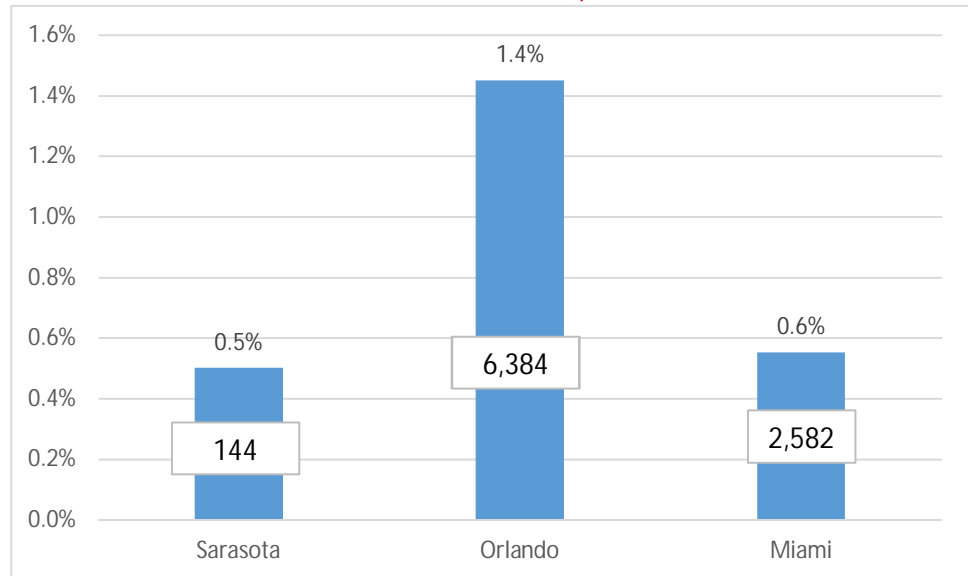


¹⁴ U.S. Census American Fact Finder

¹⁵ Airline Reporting Corporation (ARC)

The market leakage analysis shows that the primary Tampa International Airport market does not leak a substantial number of passengers to other commercial service airports. As shown, 1.4 percent of passengers departing from Orlando International Airport are from Hillsborough County. **Figure 12** illustrates three of the top airports (SRQ, MCO, and MIA) that receive leaked passengers from the Tampa International Airport market. The values that are

Figure 12. In-state Ticket Purchases¹⁶
(Represented as a Percentage of the Departing Airports Total Enplanement Volumes in 2015)



presented represent the number and percent of passengers who purchased their ticket from a Hillsborough County zip code but flew out of an alternative airport. The market leakage analysis also demonstrates that Tampa International Airport is the recipient of a substantial number of leaked passengers from the markets of other commercial service airports. Of passengers that depart from Tampa International Airport, 9.8 percent are from Sarasota and Manatee County (the primary market for Sarasota-Bradenton International Airport). Though Sarasota-Bradenton International Airport is within a one hour driving distance to Tampa International this shows that Tampa International is able to attract many passengers from another airports service area by offering more direct flight options and less expensive fares. In markets where Tampa International has a competitive level of nonstop flights when compared to Orlando International or Miami International, it competes well for local originating passengers. However, in those markets where Tampa International has no or limited nonstop flights, passengers routinely drive to Orlando, Miami, and Fort Lauderdale to avoid having to make a connection. The values that are presented represent the number and percent of passengers who purchased their ticket from a Hillsborough County zip code but flew out of an alternative airport. Data presented are from a 10 percent sample from all months of 2015.

¹⁶ Airline Reporting Corporation (ARC)