



# VIRGINIA COMMERCIAL AIR SERVICE STRATEGIC REVIEW

Prepared for  
**Commonwealth of Virginia,  
Virginia Department of Aviation**

Prepared by  
**InterVISTAS**  
a company of Royal HaskoningDHV



December 2015

# Virginia Commercial Air Service Strategic Review

## Executive Summary

### About the Virginia Commercial Air Service Strategic Review

This report contains the Commonwealth of Virginia's Commercial Air Service Strategic Review, prepared for the Virginia Department of Aviation (DOAV) in 2015 at the direction of the Secretary of Transportation. The Air Service Strategic Review was commissioned by DOAV to analyze the commercial air service successes and challenges faced by the Commonwealth of Virginia and its airports.

The Commercial Air Service Strategic Review explores air service trends and strategies at the nine primary commercial service airports in Virginia. These airports span multiple geographies, and range in size from large hubs for major world airlines to smaller, regional airports with one or two destinations. Regardless of size or geography, each of Virginia's airports fits into a larger network of commercial air service within the Commonwealth of Virginia, the United States, and the world. The role that each of Virginia's airports has to play within this global air transportation network is explored in greater detail throughout this document.

The chapters of the Virginia Commercial Air Service Strategic Review are briefly described below:

- **Chapter 1 – Review of Air Service Trends in the Commonwealth of Virginia** explores national, statewide, and local trends within the U.S. over the last decade, from 2005-2014. This period was a time of tremendous change within the U.S. domestic airline industry as U.S. carriers saw mixed financial performance and entered into a limited growth period that industry observers have referred to as “capacity discipline.” These trends have affected Virginia airports in diverse ways. This chapter reviews how Virginia's airports have mirrored and responded to national trends in air transportation over the last ten years, and provides an airport profile for each of the nine primary commercial service airports.
- **Chapter 2 – Air Service Vulnerability Benchmarking Analysis** compares the trends in traffic, connectivity and service levels identified in Chapter 1 to other U.S. peer airports and states. First, a benchmarking analysis identifies airports and states that are most comparable to Virginia and its airports. Then, indexing approaches compare the airports' performance against these peers. The areas in which Virginia outperforms and underperforms its peers are identified and explored in detail.

- **Chapter 3 – Strategic Assessment for Virginia’s Small Hub and Non-Hub Airports** provides an in-depth look at service at Virginia’s Small Hub and Non-Hub airports. Each airport’s unique service patterns and trends are examined individually. Smaller airports nationwide have been disproportionately affected by many service cuts as a result of capacity discipline, and they have responded through a variety of innovative approaches, including incentive programs, alternative airlines and other strategies. In this section, strategies for air service maintenance and growth are reviewed for small airports throughout the country, and strategies that could be particularly effective in Virginia are highlighted. This section also reviews the performance of air service development strategies at Virginia’s Small Hub and Non-Hub airports over the last decade.

The Virginia Commercial Air Service Strategic Review serves as a living document that can continue to be revised and updated by stakeholders as air service trends change and evolve nationally and within the Commonwealth.

### **National Air Service Trends 2005-2014**

The ten-year period from 2005-2014 represents one of the most turbulent periods in recent U.S. airline history, with a worldwide recession that contributed to several large U.S. airlines filing for bankruptcy, supply shocks that led to a significant increase in fuel prices, mergers of several iconic airline brands and an overall movement toward restrained growth. By the end of 2014, the domestic airline industry was more consolidated (and also more profitable) than the decade before.

Today, more than 85 percent of available U.S. domestic seat-miles are concentrated in just four carriers – Delta Air Lines, United Airlines, American Airlines and Southwest Airlines. This consolidation trend is coupled with a significant capacity cutback due to economic pressures and rising fuel prices. In this new industry environment, airlines have removed a significant portion of flights operated by small, 37-50 seat regional jets, which typically serve both smaller airports and shorter-haul routes of 500 miles or less. Between 2005 and 2014, airlines cut 38.7 percent of departures on these small regional jet aircraft at the national level, while Virginia saw a 47.4 percent reduction.

Despite recent economic growth, industry trends have prevented capacity from recovering to pre-recession levels. A strategy of airline capacity discipline, together with limited growth in departures and seats, has had significant effects nationwide, including Virginia. Additionally, a looming pilot shortage threatens to further limit growth in regional jet service pilots. As pilots employed by mainline carriers such as American, Delta, and United retire, they are often replaced by pilots from the regional sector. However, due to new regulations and a lack of new pilot candidates, regional carriers have trouble hiring enough replacement pilots. Some regional jet service reductions have already been attributed to this pilot shortage.

By the end of 2014, much of the U.S. airline network contraction was complete—a period of capacity restraint had settled in, along with restricted growth in domestic seats. Besides the ultra-low cost carriers (ULCCs) like Frontier Airlines, Spirit Airlines, and Allegiant Air, which make up less than two percent of the total domestic departures in the U.S., no airline was signaling significant growth in the near future. Internationally, growth among foreign flag carriers remained strong, with both Gulf carriers and international low-cost carriers entering larger U.S. markets. U.S. carriers also focused their international growth around key hubs—Dallas/Fort Worth for American Airlines, Seattle and Atlanta for Delta Air Lines and Houston and San Francisco for United Airlines.

### **National Air Service Trend Forecast**

Moving forward, despite lower fuel prices, there does not appear to be justification to forecast a change in the status quo in the short term. U.S. airlines have publically signaled that the capacity restraint strategy, which has led in part to record profits for the airline industry, will continue into the near future and investors are likely to be concerned if even moderate capacity increases are forecast, as this would likely erode strong profits. Any domestic growth will likely be highly regionalized and focused on growing certain large markets with strategic value. Furthermore, smaller regional jets will likely continue to be removed from the system, and replacing this service with larger regional jets in smaller markets will depend on economic fundamentals and the availability of pilots to operate this equipment.

Among the low-cost carriers—Southwest Airlines, JetBlue Airways and Virgin America Airways—capacity growth is also likely to be focused primarily in large markets. These airlines are increasingly starting to behave similarly to the larger network carriers as investors hold them to the same standard. While the ultra-low cost carriers—Frontier Airlines, Spirit Airlines and Allegiant Air—are likely to provide solid growth, these carriers represent only a small fraction of the domestic market and provide limited connectivity to the rest of the global air transportation system. Additionally, service entry by these carriers is often highly volatile and unstable; often, ULCCs announce their exit from new markets after just six months or less if service does not prove to be profitable. Finally, international growth is likely to remain strong, but focused mainly at the largest of U.S. airports.

## **Virginia's Airport Trends 2005-2014**

Just as 2005-2014 was a period of significant change and turmoil nationwide, Virginia's primary commercial service airports faced the effects of a consolidated industry that was growing much slower than in past decades. Scheduled departures fell by 26.9 percent at Virginia's primary commercial service airports from 2005-2014, and available seats were reduced by 17.2 percent over the same period.

The reduction in service at Virginia's airports highlights the struggles that airports nationwide have faced in attracting and maintaining service over the last decade. To counter these trends, the underlying business, strategic and economic factors behind these reductions at Virginia's airports needs to be understood from a system-wide perspective.

Chapter 1 explores national, regional, and local trends in air transportation from the perspective of Virginia's airports. It provides a holistic review of U.S. industry trends from 2005-2014, where the driving factors behind industry consolidation and limited growth (or capacity discipline) are explored in detail. Virginia's air service trends are also explored, including enplaned passengers, departures, seats, fleet mix, hub reliance and connectivity, which are then compared to the national average. The effects of airline consolidation and mergers on Virginia's airports are then considered in detail. Finally, a deep dive into service trends at individual Virginia airports is conducted for each of the nine primary commercial service airports, including individual trends in traffic, service, connectivity, and hub reliance. This chapter highlights how each airport has weathered the challenging airline industry conditions over the last ten years. It concludes by looking forward at what to expect in the short- and medium-term in the national air transportation system, and how these trends will likely affect Virginia.

These trends in national and international air service serve as a critical background from which to analyze Virginia's air service performance over the last decade.

### **Virginia Airports Analysis- High Level Conclusions**

Virginia's airports have faced many of the same challenges as airports nationwide regarding the availability of domestic air transportation service. Like other airports with a reliance on smaller, regional jet equipment, Virginia's airports saw significant reductions in flight capacity, seat capacity, and passenger traffic in the ten years from 2005-2014. While recovery from these cuts has been relatively flat in Virginia, a stronger regional and national economy presents many opportunities to build up service to replace losses over the last decade. Through a targeted, strategic air service development effort, the Commonwealth could target a return to pre-recession passenger levels to match the national trend.

Virginia also has several significant air transportation strengths, including a strong network of international flights that is among the strongest in the country, as well as international growth that has exceeded the national average. Non-stop or one-stop service is available from Virginia's airports to many domestic destinations as well. Each of Virginia's airports is served by at least one network carrier or its regional affiliates, and Virginia's residents are well-served by the connectivity that these airlines provide.

Virginia also has significant presence of both low-cost carriers (LCCs) and some ultra-low-cost carriers (ULCCs), yet the percentage of seats made up of LCC and ULCC service is low relative to U.S. averages. Growing these services, as well as promoting new services by these carriers and ULCCs like Frontier Airlines, Spirit Airlines, and Allegiant Air, will be important to ensure that Virginians have access to affordable, frequent air transportation. The following are key findings:

- **Passenger traffic did not recover as quickly in Virginia as the national average:** Enplaned passengers at Virginia's nine primary commercial service airports declined by 6.5 percent, compared to a national increase of 0.5 percent.
- **Virginia lost more seats and departures than the national average:** Virginia lost a greater percentage of its scheduled departures and available seats from 2005 to 2014 than the national average, with a 26.9 percent reduction, compared to an 18.4 percent reduction nationwide, and available seats in Virginia were cut by 17.2 percent as opposed to a 7.9 percent reduction nationwide.
- **International service remains a bright spot for Virginia:** Despite the reduction in domestic departures and seats, international service in Virginia remains among the strongest in the country. International departures increased by 30.7 percent from 2005 to 2014, compared to an average national increase of 11.2 percent.
- **Virginia remains heavily reliant on regional jets:** With pressures on the regional pilot labor market, as well as the continued retirement of smaller 37-50 seat regional jets, the proportion of departures operated by regional jet equipment remains a critical component in assessing the vulnerability of Virginia's transportation system to future service cuts. Virginia still relies predominately on regional jet equipment to operate its departures. Note, however, that this reliance has slightly decreased over time; in 2005, 62.5 percent of scheduled departures from Virginia's airports were operated by regional jet equipment; by 2014, this proportion had decreased to 60.6 percent.

- **For international and domestic journeys, Virginians often connect outside the Commonwealth:** As more carriers move to a hub-and-spoke network system, more and more journeys will involve a connecting itinerary. Within Virginia, two Large Hub airports, Washington Dulles and Reagan National, both offer connecting itineraries. However, most connecting itineraries to or from Virginia's Small Hub and Non-Hub airports do not pass through Washington Dulles or Reagan National. For domestic connecting journeys from Virginia's Small Hub and Non-Hub airports, just 7.3 percent of passengers connected through Washington Dulles or Reagan National in 2005. By 2014, this number had increased slightly to 7.6 percent. Instead, Atlanta and Charlotte are the two most popular connecting hubs for domestic passengers; together, these hubs control over 56 percent of the domestic connecting traffic from Virginia's seven Small Hub and Non-Hub airports.

### **Virginia Airports Analysis- Service Trends at Individual Airports**

Trends in service and passenger traffic are examined in detail for each of Virginia's primary commercial service airports, focusing on current available service, recent trends between 2014 and projected 2015 schedules, as well as performance over the last decade. Airports are discussed in alphabetical order by three-letter IATA airport code.

### **Future Trends in Virginia Commercial Air Service**

Virginia airports have weathered the capacity discipline and schedule rationalization era in different ways. Some airports have thrived despite the nationwide reductions in capacity, while others have joined their peers in seeing cuts in service and passenger traffic as carriers have reduced their schedules.

While Virginia's airports remained resilient in the face of capacity reductions, future airline strategies will undoubtedly shape Virginia's air transportation landscape over the next five years, including the following key factors:

- United Airlines' capacity growth strategy will be critically important for the Commonwealth to monitor. As the major tenant of one of Virginia's Large Hub airports— Washington Dulles—United's domestic capacity growth strategies at Washington Dulles relative to their other hubs (including to Lynchburg and Newport News—the two Virginia airports without current nonstop service to Washington Dulles), and even the relationships between United and its Star Alliance partners, will affect the types of service that will be available to Virginia's residents and visitors.
- Many of Virginia's airports currently rely significantly on American Airlines. The airline has a significant presence at its focus airport of Ronald Reagan Washington

National Airport, and despite recent slot divestitures, remains a key player in the Washington aviation market. Also, American Airlines' hub at Charlotte was the most-popular or second most-popular connecting point for passengers at six of Virginia's seven Small Hub and Non-Hub airports.

- In coming years, US Airways' network is likely to see changes as a result of its merger with American Airlines. Much as the other network carriers "rationalized" the size of their networks through their mergers and acquisitions, so too might the combined American/US Airways make selective cuts in flights, especially where services overlap. These impacts will likely be felt in stages over the next five years.
- Overall, the industry is likely to continue to maintain domestic capacity discipline to appease investors and lock in profitability. U.S. carriers continue to signal that capacity growth will remain limited, despite lower fuel prices.
- U.S. airline profitability will likely result in a redoubled effort on passenger experience improvements, with new developments in technology and passenger comfort. While these improvements might not directly affect Virginia passenger numbers, they are a sign that the domestic industry is in a period of relative economic health.
- International growth will likely accelerate or continue at current levels, and foreign-flag low-cost carrier impacts will be important to monitor as well. While international growth will likely be a strong point nationwide, keeping this traffic connecting within Virginia instead of out-of-state could be a strategic goal for the Commonwealth. The extent to which passengers from Virginia communities are driving directly to Washington Dulles or Reagan National instead of taking a domestic connecting flight first should also be understood in more detail.

### **Benchmarking Virginia's Airports Against Peers**

In Chapter 2, a more detailed analysis compares Virginia's airport service performance directly to a set of peers. This approach, which is often called a *benchmarking analysis*, provides a more detailed look at the ways in which Virginia's airports outperform, underperform, or are on par with their peers across a number of air service metrics.

A full benchmarking analysis is provided for each of Virginia's nine primary commercial service airports in order to accurately compare these airports' performance to a set of peer markets in the nation. This analysis is broken down into several stages, described in the methodology review.

Upon establishing the methodology for selecting relevant peers and comparison criteria, an in-depth review of peer benchmarking performance is conducted for each airport. This analysis concludes with broader statewide trends and lessons learned, as well as targeted areas for air service improvements. This chapter also includes appendices that review, in detail, each of the airport benchmarks and the performance of each airport relative to its peers.

## **Benchmarking Analysis Results**

Virginia airports are evaluated based on their performance in 2005 and 2014—before and after the recession and the capacity discipline movement. For each airport, trends in capacity, traffic, revenue, and connectivity are compared to peer markets, in addition to all airports in that airport’s FAA hub type. Airports are discussed in alphabetical order by three-letter IATA airport code.

### **Charlottesville-Albemarle Airport (CHO)**

Charlottesville and its peer markets present overall encouraging demographics compared to the U.S. non-hub average. The average peer market population is 10 percent higher than Charlottesville, though total employment figures are similar. Income per capita is higher at Charlottesville.

- Though CHO retains service with smaller equipment compared to peer markets, the average number of seats per departure increased 1.9 percent per year between 2004 and 2014, similar to a 1.8 percent yearly increase in peer markets. An average of 46 seats per departure in 2014 shows that CHO still relies on regional jets and turboprops for the majority of service.
- In 2004, the airport was generating 14 percent less O&D traffic per available seat, compared to peer markets. However, in 2014, CHO presented similar O&D traffic figures per seat to those of peer markets. CHO’s performance has been on par with peer markets, generating six percent additional O&D revenue per seat on domestic flights. Though non-hub airports have experienced an increase, their increases have not been as significant on a percentage basis over the past decade.
- CHO scores particularly high on O&D traffic per capita, with 35 percent more than peer markets and more than twice the amount at non-hub airports.
- The gap between CHO and the peer market average on O&D traffic per flight has shrunk over the last decade; comparable airports generated 33 percent more O&D traffic per flight in 2004, compared to 19 percent more in 2014. In contrast, U.S. non-hubs have shown

declining O&D numbers per flight over the same period.

- Although CHO generates less revenue per flight compared to peer markets, this gap has shrunk over the past decade, from 29 percent in 2004 to 20 percent in 2014. CHO's per flight revenue is significantly above those of fellow non-hub airports.
- While CHO's load factor was lower than those of both peer markets and the non-hub average, it has dramatically improved and is now on par with peer markets, with a yearly increase of more than two percentage points.
- CHO scores much higher on MIT's ACQI connectivity index than peer markets and non-hub markets. The airport is served by all three major carriers, a considerable asset when compared to airports of its size.

### **Ronald Reagan Washington National Airport (DCA)**

The Washington D.C. region presents significantly higher GDP per capita and slightly higher total employment, though the city ranks lower on population than peers. DCA's market is thus home to a smaller but wealthier population.

- DCA's perimeter rule implies that flights can only be operated to destinations located within 1,250 miles. This makes the use of smaller aircraft with shorter range capabilities more likely, putting downward pressure on the average aircraft size for domestic flights.
- Average seats per departure increased only 0.1 percent per year, compared to 0.2 percent and 0.6 percent for peer markets and large hubs respectively.
- DCA consistently generated more O&D traffic per seat than peer markets and other large hubs. It has also shown robust growth, with O&D traffic per seat growing at 1.7 percent per year over the last decade; peer markets have however shown a yearly growth rate of 1.9 percent, above that of large hubs at 1.5 percent. It is important to note that DCA has a higher propensity towards domestic flights. Large hubs may generate just as much traffic, though with a higher international to domestic ratio.
- DCA generates significantly more revenue per seat than comparable large hubs. The revenue increase per seat has however been slower at DCA than at peer markets and other large hubs, at 4.7 percent, 5.7 percent, and 5.3 percent per year respectively.
- Despite encouraging demographics, Washington D.C. only generates slightly more than 60 percent of the O&D traffic per capita. Washington's metropolitan area has three large hubs;

DCA, Dulles and Baltimore. This makes it unique among peer markets. Each airport in Washington D.C. may generate only a fraction of the region's total traffic per capita. Perimeter rules also make traffic leakage from DCA to Dulles necessary to reach medium haul domestic destinations without stopovers. Thus, despite encouraging demographics, DCA does not generate outstanding traffic per capita compared to large hubs.

- The increase in traffic per flight is in line with the national trend, with a faster increase than peer markets over the last decade; traffic per flight grew 2.1 percent per year compared to 1.9 percent nationally.
- Average O&D revenue per flight increased drastically since 2004. DCA is still a strong revenue generator among Large Hubs, and has stayed ahead of peer markets in this ranking. However, the yearly revenue growth per flight has been slower than at peer markets and other Large Hubs, with per-flight revenue growth at 4.7 percent per year, compared to 5.9 percent for peer markets and 6.1 percent for large hubs.
- From 2004 to 2014, DCA's load factor increased at a similar pace as that of peer markets and large hubs – roughly 1.8 percent yearly. DCA still ranks slightly behind peer markets.
- DCA scores much lower on connectivity than peer markets with similar demographics. Connectivity is limited at DCA. The perimeter rule restricts air service to cities located fewer than 1,250 miles from the airport, which rules out any air service expansion to hubs outside this perimeter, though some exceptions have been granted. Also, lack of customs facilities at DCA restricts flight to domestic services and airports equipped with U.S. pre-clearance facilities. The airport has limited international air service, with three destinations in Canada served nonstop. It is thus understandable that DCA scores below its peers on connectivity.

### **Washington Dulles International Airport (IAD)**

As a Large Hub airport serving one of the largest metropolitan areas in the country, IAD's peer airports contain a number of the country's largest airports and metropolitan regions. IAD has a significant amount of nonstop international service, and its international portfolio is one of the great strengths of Virginia's air transportation system. However, to allow for parity in the benchmarking analysis between IAD and other, small Virginia airports, domestic passenger traffic and capacity data is used for much of the analysis.

- IAD's seats per departure are lower than both peers and the Large Hub average. Although seats per departure have increased as airlines, including United Airlines, upgauged their fleets, the pullback in growth of low-cost carriers at IAD has prevented seats per departure

from reaching peer levels.

- In 2004, Washington Dulles was on par with peers in domestic O&D passengers per seat. However, as domestic traffic levels have fallen at IAD, the airport's peers now have a higher traffic per seat value than IAD. Both IAD and its peer group rank below the Large Hub average.
- IAD is able to command greater O&D revenue per domestic seat than both peers and the Large Hub average. With average revenue per seat of \$95.80, it surpassed the peer average by over \$8.50 per seat in 2014. Among peers, IAD ranked behind only Boston, San Francisco, and Los Angeles in terms of domestic O&D revenue per seat in 2014. However, on a per-flight basis, IAD's O&D revenue falls below both the peer market and the Large Hub averages. This is likely due to the fact that IAD's average seats per departure for domestic flights was more than 20 percent smaller than peer markets and the Large Hub average. As a result, the revenue per flight for IAD would also be smaller.
- One bright spot for IAD is its average domestic load factor relative to peers and Large Hubs. Not only did IAD's 2014 load factor of 84.3 rank above the peer average, it ranked higher than any of the 10 peer markets individually in that year.
- In connectivity, IAD ranked lower than both peers and Large Hubs. It should be noted, though, that some peer markets contain more than one airport, which would increase the region's connectivity relative to IAD alone. If DCA's connectivity score were added to IAD's score, the Washington region would have a total connectivity score of 499.5 and rank higher than the peer market average in 2014.

### **Lynchburg Regional Airport (LYH)**

Although Lynchburg's passenger enplanements put the airport in the Non-Hub category, its demographics and economic variables generated a list of peer airports that included some Small Hub airports. Lynchburg's population and total employment are either at par or above peer airports. However, its peers slightly outperformed Lynchburg in some economic measures, including GRP and income per capita. In population, GRP, and total employment, Lynchburg and its peers both outperformed the Non-Hub average.

- Although LYH serves only a single destination—Charlotte, NC—its average aircraft size has increased in the last ten years, from 38 seats in 2004 to 50 seats in 2014. In both years, LYH's average aircraft size was greater than the Non-Hub average. However, LYH's peers supported larger aircraft types, including some 76-seat regional jets and even narrowbody service.

- In 2004, LYH's average O&D traffic and revenue per seat ranked below peers and Non-Hubs. However, since then, LYH has seen significant growth, with average traffic per seat nearly doubling from 0.4 passengers in 2004 to 0.72 passengers in 2014. This value now exceeds both peers and Non-Hubs.
- There was also a significant increase in O&D revenue per seat from \$75 in 2004 to \$163 in 2014—over \$25 more per seat than the peer average.
- LYH's peers generated 2.0 passengers per capita in 2014, compared to just 0.6 passengers per capita at LYH. This suggests the possibility for untapped potential to increase passenger numbers by boosting propensity to travel.
- The number of passengers and revenue per flight have both increased, with O&D revenue per flight at LYH that is greater than peers in 2014.
- LYH's load factor performance increased by over 27 percentage points in recent years, with an average load factor of 79.4 percent that ranks above peers and Non-Hubs.
- Since LYH serves only a single destination, it is not surprising that its connectivity score is lower than peers that serve multiple destinations. However, its connectivity still remains above the Non-Hub average, which speaks to the significant increase in connecting options available at Charlotte, NC and the domestic and international growth that US Airways has put into place at Charlotte over the last decade.

### **Newport News Williamsburg International Airport (PHF)**

Newport News is a Non-Hub airport located in a metropolitan region of roughly 180,000 people—similar to the Non-Hub average. Among peer airports, Newport News is slightly smaller in terms of population and total employment, although GRP is fairly similar to peers. Like many Virginia airports, Newport News' income per capita ranked above the other airports in its peer group and it ranks above the Non-Hub average in each of the demographic and economic selection criteria.

- Unlike many of its Non-Hub peers, PHF had a significant amount of narrowbody service in 2004 with the presence of AirTran Airways.
- As AirTran Airways exited the market, the average number of seats per departure at PHF has moved closer to peers. From 2004 to 2014, average seats per departure decreased from 71 to 53, while seats per departure among peers increased from 48 to 51.

- Average O&D traffic per seat at PHF increased by 15 percent from 2004 to 2014, compared to a 19 percent increase among peers. In both time periods, Newport News' O&D traffic per seat exceeded both the Non Hub average and peers.
- O&D revenue per seat has increased significantly in the midst of capacity reductions. While PHF's peer airports exceeded it in terms of O&D revenue per seat in 2004, by 2014 PHF's revenue per seat exceeded both peers and Non Hubs.
- PHF's O&D traffic per capita was significantly stronger than peer markets and Non Hubs, with an average of 2.4 O&D passengers per capita in 2014, compared to just 1.4 for peer markets and Non-Hubs.
- On a per-flight basis, PHF showed the opposite trend in O&D traffic compared to traffic on a per-seat basis. While per-seat traffic increased 15 percent from 2004 to 2014, O&D traffic per flight at PHF decreased by 15 percent over the same period. Even with this decrease, passengers per flight at PHF still exceeds peers and Non-Hubs.
- Average load factors at PHF increased from 71.5 percent in 2004 to 77.8 percent in 2014, exceeding peers in both time periods. While PHF's average load factors exceeded peers by 8.3 percentage points in 2004, by 2014 this gap had shrunk to just 0.2 percentage points. It should be noted that sequestration has had a damaging effect on the Hampton Roads region. Military personnel and supporting businesses/contractors are not spending or traveling at the rate prior to sequestration. However, both PHF and its peers exceed the Non Hub average in load factors.
- While PHF outperformed peers in many service categories, one service trend where the airport struggled over the last decade is its connectivity to the national and global air transportation network. As a result of the loss of AirTran Airways service, PHF's ACQI connectivity score decreased 32 percent from 2007 to 2014, compared to a 12 percent peer decrease.

### **Norfolk International Airport (ORF)**

Norfolk, a Small Hub airport located in a fairly large metropolitan region of over 1.5 million people, exceeds its peers in most demographic categories, and its income per capita is in line with peers. While Norfolk exceeds peers in most categories, the local population and employment is defense-intensive and subject to mass deployments, cutbacks and employment shifts that in turn impact its overall performance. Despite having a population and total employment roughly 10 percent superior to small hubs, Norfolk has similar income per capita.

- ORF's rate of increase for average number of seats per departure is slower than at other airports, with 0.7 percent per year growth through the last decade, compared to 0.8 percent at peer markets and 1.9 percent in small hubs.
- Though the number of O&D passengers has grown slightly over the last decade at ORF, both peer markets and small hubs have experienced much faster growth with 1.9 percent per year at small hubs compared to 0.5 percent per year at ORF.
- ORF's 2014 capacity performance is below peers and small hubs with a 28 percent cut in capacity between 2004 and 2014, and a 24 percent decrease in O&D traffic. By comparison, peer markets experienced a 20 percent decrease in capacity and an 8 percent drop in O&D traffic.
- Though ORF's traffic per seat is below peer markets, its revenue per seat is higher. ORF has consistently generated more revenue per seat than peer markets and small hubs other the past decade, while revenue growth rates are comparable across all cities.
- With comparable population, employment and GDP per capita, ORF generates little more than half of the traffic per capita of peer markets. ORF is not served by an ultra-low cost carrier, unlike many peers, and Southwest Airlines pulled out of several markets from ORF. Newport News' close location to ORF may explain some of this trend.
- Each flight out of ORF generates more traffic and per-flight capacity is increasing, with an average 1.3 percent more passengers per year on each flight between 2004 and 2014, compared to 2.4 percent for peers and 3.9 percent for small hubs. For 2014 versus 2004, Norfolk lost 33 percent of its flights, and peer markets lost about 29 percent. During the same period, O&D levels at ORF dropped by more than 24 percent, while the peer average is down 9 percent.
- Average O&D revenue per flight increased since 2004, with average yearly growth rates of 5.8 percent, 6.8 percent, and 7 percent between 2004 and 2014. ORF's average revenue per flight is below that of most peers.
- From 2004 to 2014, overall capacity and enplanements have been reduced. Load factors have improved as the number of enplanements was decreasing slower than capacity. ORF is still performing better than most peers, though load factors have been increasing at a faster pace at peers and small hubs. It should be noted that sequestration has had a damaging effect on the Hampton Roads region. Military personnel and supporting contractors/businesses are not spending or traveling at the rate prior to sequestration.

- ORF has a lower connectivity index than most peers. It is, however, well-connected to U.S. hubs in the Eastern half of the country.

### **Richmond International Airport (RIC)**

Richmond and its peers both compare favorably to Small Hub airport averages. Richmond and its peers have population, gross regional products, and total employment figures that are roughly double that of the Small Hub average. Richmond itself is comparable to peers in population, GRP, and employment, although the peer income per capita is slightly higher than Richmond.

- Seats per departure at RIC increased from 66 in 2004 to 80 in 2014, below peers each year.
- RIC has kept pace with peers and Small Hubs in O&D passengers per seat, placing within 0.02 passengers per seat of peers and Small Hubs in 2014.
- Average O&D revenue per seat is one metric for which RIC sees an advantage over peers, with \$135 per seat in 2014, compared to \$126 for peers and \$132 Small Hubs.
- Among peer airports, RIC ranks third for revenue per seat.
- RIC ranked lower than peers in O&D traffic per capita, with 2.3 trips per capita in 2014, compared to 3.1 trips among peers. However, Richmond's propensity to travel was largely in line with the Small Hub average of 2.4 passengers per capita.
- RIC's O&D passengers and revenue per flight were lower than peers. However, both of these metrics increased over the years as seats per departure at the airport increased.
- RIC performs on par with peers in load factors, with an average load factor increase from 64.3 percent in 2004 to 79.7 percent in 2014. In 2014, RIC's load factors were within one percentage point of peers, and roughly on par with Small hubs.
- RIC's ACQI connectivity score now exceeds its peer average, and is more than double that of Small Hubs. Given that RIC's peer category includes some Medium Hub airports, its performance shows its relative strength among Small Hubs. RIC's passenger traffic and revenue rank the airport among some Medium Hub airports in terms of performance, and its connectivity is stronger than the Small Hub average. RIC was the fourth largest Small Hub airport in 2013, and could potentially move up into the Medium Hub category in coming years if passenger numbers grow.

## Roanoke-Blacksburg International Airport (ROA)

Roanoke and its peer airports rank far above the Non-Hub average in terms of population, GRP, and total employment, whereas the Non-Hub average income per capita is roughly at par with both Roanoke and peers.

- ROA's seats per departure have increased from 2004 to 2014, but have not reached the peer market average. However, seats per departure at both peer markets and ROA exceed the Non-Hub average.
- ROA's O&D traffic per seat is slightly lower than peers and Non-Hubs. However, the 0.14 passenger per seat increase in ROA traffic between 2004 and 2014 was slightly higher than peers, which increased by 0.12 passengers per seat. O&D revenue per seat at Roanoke exceeds the Non-Hub average, but falls slightly short of peers.
- ROA outperforms peers and Non-Hubs in average O&D traffic per capita, with an average of 1.7 passenger trips per capita in 2014, compared to 1.3 passengers per capita among peers and 0.9 among Non-Hubs. ROA ranked fourth out of peers, behind only Sioux Falls, Eugene, and South Bend—each of which are Small Hub airports.
- ROA outperforms the Non-Hub average in terms of O&D revenue, even though it underperformed all Non-Hubs in revenue per seat. This suggests that ROA's average aircraft size is larger than Non-Hubs as a whole. However, in both 2004 and 2014, ROA's peers outperformed ROA in both revenue per flight and revenue per seat.
- ROA's load factors improved significantly, with an increase in average load factor from 58.1 percent in 2004 to 75.4 percent in 2014, exceeding the Non-Hub average in each year. However, the airport's load factor was 4.5 percentage points lower than the peer average in 2014.
- One characteristic in which ROA outshines peers is connectivity, with an ACQI score of 37.5 in 2014, outpacing the peer average of 28.3, and more than triple the Non-Hub average of 11.4. Although connectivity has declined at ROA over the last seven years, it still remains better connected than a majority of peers, which also saw connectivity fall over those years.

## Shenandoah Valley Regional Airport (SHD)

SHD is the only Virginia airport at which commercial air service is supported by the Essential Air Service program—a federal subsidy program that provides funding for flights from small communities to nearby Medium Hub and Large Hub airports. Each of SHD’s peer airports with the exception of St. George, Utah; San Angelo, TX; and Williamsport, PA were supported by Essential Air Service funding. Shenandoah Valley compares similarly to peers in economic and demographic characteristics, although peer GRP and total employment ranked slightly higher than Shenandoah Valley. However, both Shenandoah Valley and peers ranked below the Non-Hub average in each of the four economic and demographic selection criteria.

- Seats per departure at SHD and peer airports both ranked below the Non-Hub average in 2004 and 2014. However, in 2014, SHD’s average aircraft size increased, and it exceeded peers in seats per departure.
- While SHD’s aircraft are slightly larger than peers, its level of O&D traffic relative to seats was lower than peers with average O&D passengers per seat increasing only slightly from 2004 to 2014, from 0.27 to 0.32. This ranks below peers at 0.34 in 2004 and 0.44 in 2014, and is nearly half of the Non-Hub airport average in 2014. This value is also far below many larger Small Hub and Medium Hub airports.
- SHD’s revenue per available seat ranks lower than peers and is nearly half of the Non-Hub average. It is important to note that this revenue value only includes passenger fares; any additional subsidies from the Essential Air Service program are paid directly from the federal government to the airlines and are not included.
- SHD’s passengers per capita are low compared to national averages, generating 0.17 O&D passengers per capita, compared to a large hub average of 0.86. While SHD ranked below peers in this category, its Essential Air Service peers generated between 0.01 and 0.37 O&D passengers per capita; similar to SHD’s levels.
- SHD’s load factor in 2014 was 41.4 percent, compared to a 53 percent load factor among peers and 71.3 percent among Non-Hubs. While SHD ranked lower than peers in terms of average load factor, it did not have the lowest load factor amongst its peers — Beckley, WV filled only 21.3 percent of seats in 2014, while Kingman, AZ’s average load factor in that year was just 18.6 percent.
- A new rule instituted in 2014 put a cap on the maximum Essential Air Service subsidy allowed per passenger at an airport. Airports at which subsidy values exceeded \$1,000 per passenger face potential removal from the Essential Air Service program and, as a result,

a discontinuation of all commercial air service from the airport. While SHD has load factors that are double Kingman’s, such a fate is important to keep in mind when developing strategies to attract more passengers to fly from Virginia’s smaller airports.

- SHD’s ACQI connectivity score exceeded peers in 2007 and 2014, and was exactly on par with the Non-Hub average in 2014. Therefore, while Essential Air Service airports often rank lower than other Non-Hubs in terms of passenger traffic and load factors, they serve their goals well of connecting small community residents to the global air transportation network.

### Benchmarking Conclusions and Outcomes

Exhibit 4-1 summarizes the benchmarking analysis results below. The exhibit shows the number of Virginia primary commercial service airports that outperformed their group of ten peer airports in the benchmarking analysis, as well as the number of airports that underperformed their peers.

Note that “underperformance” is not necessarily a strict negative—for instance, O&D revenue per flight is closely related to the number of seats per departure at an airport. If an airport’s peers had greater seats per departure than the airport itself, the peer average O&D revenue per flight is also likely to be higher. This is not a demerit on the airport in question; instead, it simply shows that the service patterns at that airport are different from its peers.

**Exhibit 4-1: Summary of Virginia Primary Commercial Service Airport Performance in the Peer Benchmarking Analysis in the Year Ended 3Q 2014**

Characteristic	Outperformed Peers	Underperformed Peers
Seats Per Departure	2	7
O&D Traffic Per Seat	3	6
O&D Revenue Per Seat	6	3
O&D Traffic Per Capita	3	6
O&D Traffic Per Flight	2	7
O&D Revenue Per Flight	3	6
Average Load Factor	4	5
ACQI Connectivity Score	5	4

As Exhibit 4-1 shows, a majority of Virginia's primary commercial service airports outperformed their peers in only two of the eight service characteristic categories: O&D revenue per seat and ACQI connectivity score. In all other service characteristic categories, a majority of Virginia airports underperformed their peers.

There are a number of factors that could have led to this overall trend. First, most Virginia airports underperformed their peers in seats per departure. That is, on average, Virginia airports are more likely to have smaller aircraft operating domestic departures than their peers. This aligns with the statewide trend where Virginia still relies heavily on smaller regional jets for domestic service.

As a result of lower seats per departure than peers, Virginia's airports are also more likely to underperform on several related categories. For instance, it is not surprising that with smaller aircraft on average, Virginia's airports underperformed peers on O&D traffic levels per flight. With smaller aircraft, passengers per flight are also likely to be at lower levels. The same is true for O&D revenue per flight, which is also a function of the average aircraft size.

In addition, O&D traffic per seat and O&D traffic per capita are closely linked. While passenger traffic grew nationwide from 2010-2013, the level of passenger traffic in Virginia was relatively flat during that same period. This likely caused Virginia's airports to underperform peers in these categories.

Two encouraging trends are the outperformance of Virginia's airports relative to peers on O&D revenue per seat and the ACQI connectivity score. The former suggests that airlines are likely to find high-yielding passengers flying out of Virginia's airports. This speaks to the strength of the Virginia business community, which would be more likely to supply high-yielding passengers. However, it could also cause some leisure passengers to divert to peer airports where lower fares are more likely to be found.

Virginia's performance relative to peers in connectivity to the global air transportation system is a testament to the value that the Virginia airport system provides to the Commonwealth and its residents. The high connectivity score means that these airports offer a strong selection of nonstop and connecting flights, and that Virginia's residents are likely to be able to reach most points in the nation and the world within one or two stops of their home airport. Given the close ties between air transportation connectivity and economic activity, Virginia's strong performance in this category is a positive key indicator for Virginia's air transportation system.

This analysis highlights some areas in which Virginia's air transportation policy could focus its efforts for improvement—specifically, on attracting more passengers to airports that fall below peers in terms of O&D traffic per seat and per capita. Increasing passenger traffic at these

airports will likely provide incentive for airlines to upgauge capacity, increasing the number of seats per departure and also the average O&D traffic and revenue per flight. That is, as passenger numbers at these airports continue to improve, they will likely begin to outperform peers in some other service characteristics. Further detail on the benchmarking analysis for each of Virginia's airports is provided in an appendix.

### **Virginia's Small- and Non-Hub Airport Assessment**

In Chapter 3, a strategic assessment of Virginia's small- and non-hub airports is conducted, including trends at small-hub airports at Richmond and Norfolk; non-hub airports at Charlottesville, Lynchburg, Roanoke and Newport News; and Shenandoah Valley, which is supported by an Essential Air Service (EAS) subsidy. Virginia's smaller commercial airport performance is then benchmarked against state systems with similar attributes. The intention is not to compare airports against each other, but to identify targets and areas where marketing help can aid airports maintain and even grow air service. Further, it will guide the Commonwealth as to whether to make an investment and whether it should improve and enhance its existing air service marketing program.

Finally, an in-depth review of air service development incentive programs throughout the U.S. is conducted, including federal air service development programs designed for small communities such as the Essential Air Service (EAS) program and the Small Community Air Service Development (SCASD) Grant program. These federal programs are among the best known for providing subsidies or grants in exchange for commercial air service activities in small communities.

Also included is a detailed review of air service development incentives offered at the state and local level. Air service incentive activity is explored locally for 21 small- and non-hub U.S. airports. Furthermore, state-level air service development program activities are reviewed in 12 states, including Virginia. This analysis includes states that were successful in commencing and maintaining an air service development program, and those that were not. The lessons learned from this section can serve as a guide of best practices when establishing a new, or retaining an existing, air service development program.

## **State by State Benchmarking**

This section analyzes performance on a state-by-state basis over two trend periods: August 2007 – August 2015; and August 2014 – August 2015. This closer look at trends reveals many positive changes, suggesting that declines in service are beginning to abate and modest growth trends are developing.

Eight states are selected to compare against the performance of the nine Virginia commercial air service airports. Virginia's small and non-hub airport performance is also evaluated as compared to similar airports in comparative states. The selected states are Illinois, Massachusetts, Michigan, Minnesota, New York, North Carolina, Pennsylvania and Georgia.

The eight states were selected based on a similar mix of large, small and non-hub airports and the criterion that there are no medium-hub airports present, which can distort results. For these states, traffic and capacity levels are similar, and the East Coast and Midwest geographies behave most like that of Virginia. States are compared on the number of carriers operating, the number of nonstop routes, the number of departures performed and the number of seats in each respective market. The statistical appendix includes an analysis of all 50 states and is not limited to the eight states chosen for comparison.

## **Benchmarking All Virginia Commercial Service Airports**

Of its eight peer states, no state has more average carriers operating per airport than Virginia. This speaks to the extremely competitive air transportation environment that exists within the Commonwealth. Virginia's average is buoyed by the two Northern Virginia airports of Washington Dulles and Washington Reagan with 10 and nine carriers operating respectively as of August 2015. Virginia's small-hub airports of Richmond and Norfolk have six and four carriers operating respectively. Among the Commonwealth's four non-hub airports, Roanoke has four carriers operating, Charlottesville has three, Newport News has two, Lynchburg has one and Shenandoah Valley has one as of August 2015.

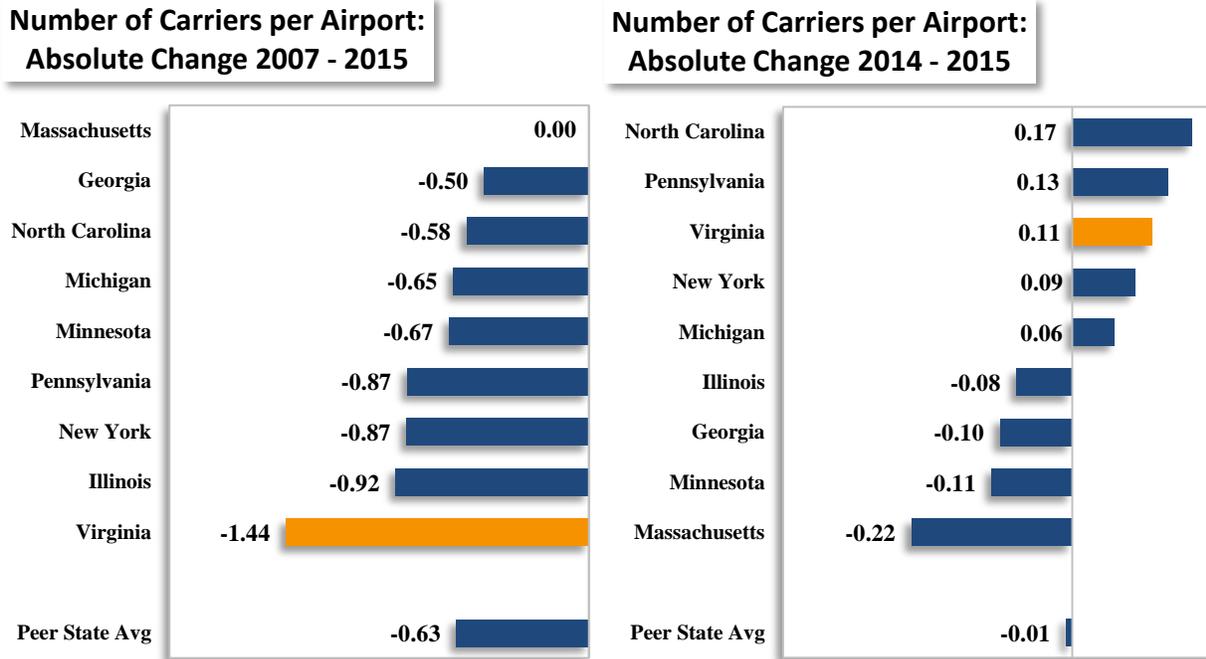
**Exhibit 2-1: Summary Metrics for All Commercial Service Airports in Benchmark States**

	Number of Carriers per Airport			Number of Nonstop Routes			Departures			Seats		
	Aug 07	Aug 14	Aug 15	Aug 07	Aug 14	Aug 15	Aug 07	Aug 14	Aug 15	Aug 07	Aug 14	Aug 15
Illinois	3.5	2.7	2.6	245	275	277	48,004	45,879	44,831	4,830,046	4,442,116	4,658,369
Massachusetts	3.0	3.2	3.0	104	103	103	20,969	19,388	19,182	1,492,358	1,570,477	1,654,803
Michigan	2.9	2.2	2.3	198	177	168	23,749	19,849	19,413	2,089,291	1,801,485	1,906,256
Minnesota	2.8	2.2	2.1	154	133	133	18,475	16,766	16,724	1,872,411	1,813,339	1,887,465
New York	3.8	2.9	3.0	282	259	256	45,453	37,743	37,178	4,132,322	3,765,208	3,860,161
North Carolina	3.5	2.8	2.9	186	190	203	30,956	29,774	29,849	2,665,983	2,854,014	2,895,254
Pennsylvania	3.7	2.7	2.8	203	176	187	29,311	23,170	23,500	2,476,030	2,035,727	2,089,068
Georgia	2.5	2.1	2.0	201	191	184	42,145	35,410	36,642	4,569,728	4,464,615	4,706,193
<b>Peer State Avg.</b>	<b>3.2</b>	<b>2.6</b>	<b>2.6</b>	<b>197</b>	<b>188</b>	<b>189</b>	<b>32,383</b>	<b>28,497</b>	<b>28,415</b>	<b>3,016,021</b>	<b>2,843,373</b>	<b>2,957,196</b>
<b>Virginia</b>	<b>5.9</b>	<b>4.3</b>	<b>4.4</b>	<b>226</b>	<b>219</b>	<b>217</b>	<b>31,876</b>	<b>26,593</b>	<b>26,872</b>	<b>2,743,949</b>	<b>2,313,800</b>	<b>2,475,001</b>

Source: Innovata SRS schedule data via Diio Mi

As seen in Exhibit 2-1, Virginia's nine commercial air service airports have an average of 4.4 carriers versus 2.6 for comparative states. The base period of August 2007 provides context on the consolidation impact on the number of carriers operating at Virginia airports and comparative states.

**Exhibit 2-2: Change in Number of Carriers per Primary Commercial Service Airport**

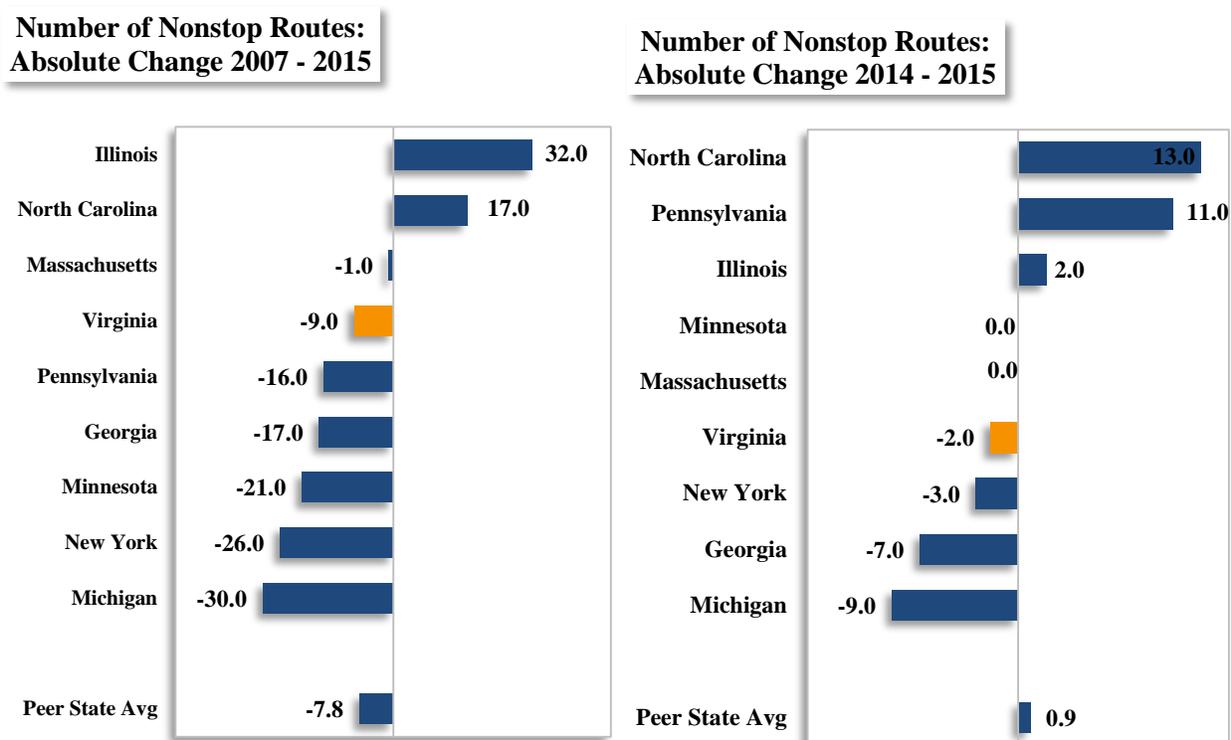


Source: Innovata SRS schedule data via Diio Mi

Given the sheer number of carriers operating in the Commonwealth, it is not surprising that Virginia has seen the largest decrease in number of carriers operating in 2015 compared to 2007. However, the fact that there has been a marginal increase in the number of carriers serving Virginia in the last year is a positive trend. Another positive development is that the number of international carriers has increased since both 2007 and 2014 at Washington Dulles.

From a state perspective, only Illinois (277) and New York (256) have more nonstop routes served from their commercial airport systems than Virginia (217). Washington Reagan has service to 82 domestic nonstop points, while Washington Dulles has service to 80 domestic points. Norfolk and Richmond each have service to 18 points, Roanoke has service to eight, Charlottesville to six, Newport News to three, and Lynchburg and Shenandoah Valley each have service to one point as of August 2015.

**Exhibit 2-3: Change in Nonstop Routes Served from Primary Commercial Service Airports**



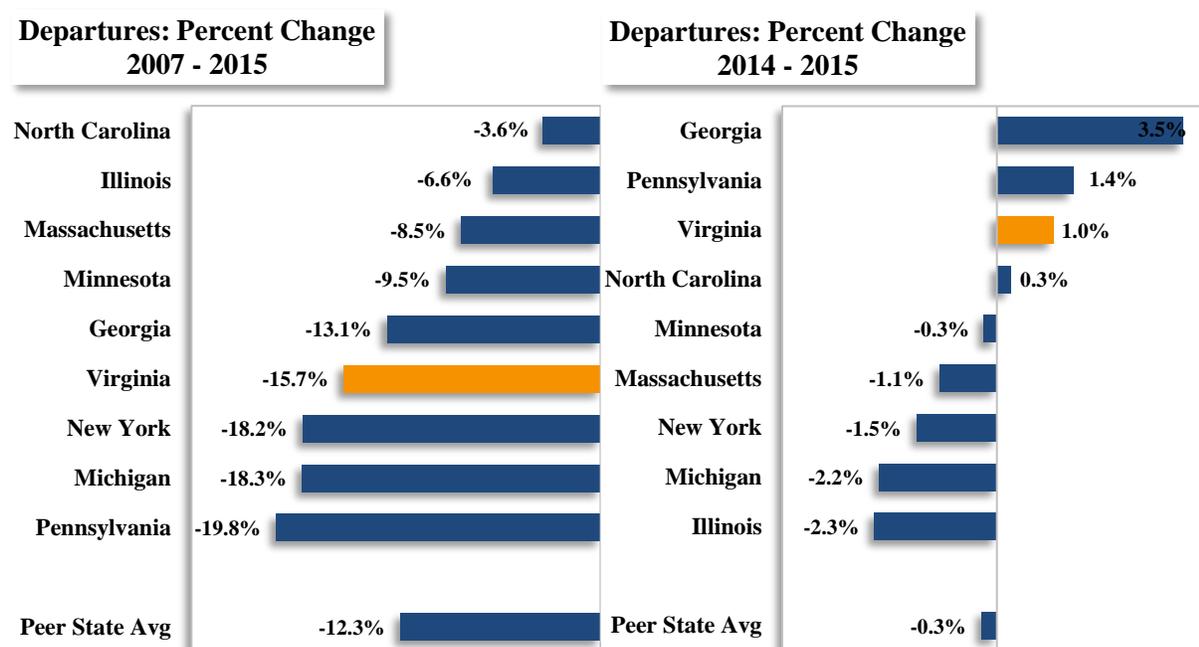
Source: Innovata SRS schedule data via Diio Mi

Since 2007, only Illinois and North Carolina have seen increases in the number of domestic nonstop points served, whereas Virginia lost service to nine points. On balance, Virginia has fared well when compared to peer states. Since 2014, Virginia lost service to two domestic points while North Carolina, Pennsylvania and Illinois all saw growth. Since 2014, only Richmond saw an increase in nonstop points served while Roanoke and Newport News each lost some nonstop domestic service. When compared to 2007, Washington Reagan has experienced an increase of 10 points served, Washington Dulles and Shenandoah Valley saw no change, and the remainder experienced a loss, with the largest declines in Norfolk and Newport News. Again, the sequestration impact on this geographic region is still present.

In terms of scheduled departures at all of Virginia’s airports, only Washington Reagan has experienced an increase since 2007. Each of the other eight Virginia airports experienced declines ranging from -9 percent at Shenandoah Valley to -53 percent at Newport News as Southwest exited the market after purchasing AirTran– a lynchpin in Newport News’ service portfolio. Despite the externalities that undermined Newport News’ air service, the market still ranks as number 43 among 232 non-hub airports in terms of service.

As compared to 2014, the picture turns a bit brighter as U.S. domestic carriers have exhibited some appetite for growth. Washington Reagan continues to grow and is joined by Norfolk, which saw departures in August 2015 as compared to the prior year period increase by 4.2 percent. Shenandoah Valley experienced no change in the number of departures as compared to 2014, while the other six commercial airports saw decreases ranging from one percent at Charlottesville to 12.6 percent at Newport News.

**Exhibit 2-4: Change in Departures from Primary Commercial Service Airports**



Source: Innovata SRS schedule data via Diio Mi

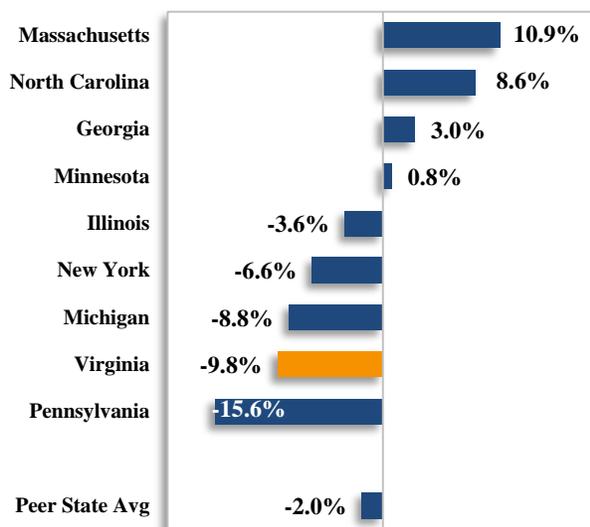
In keeping with trends, departures at peer states all declined when comparing 2015 with 2007. While Virginia performed very close to the peer average, the loss in number of departures is still a significant 15.7 percent. However, 2015 as compared to 2014 reveals a softening in the rate of decline. In fact, four of the nine states actually experienced a year-over-year increase in the number of departures.

Between 2007 and 2015, Virginia’s nine commercial air service airports experienced a decrease in departures of 15.7 percent and a lesser decline in seats of 9.8 percent, mirroring the national trend of larger aircraft being deployed in the domestic system. Four of the commercial air service airports actually saw an increase in the number of seats. Shenandoah Valley experienced a

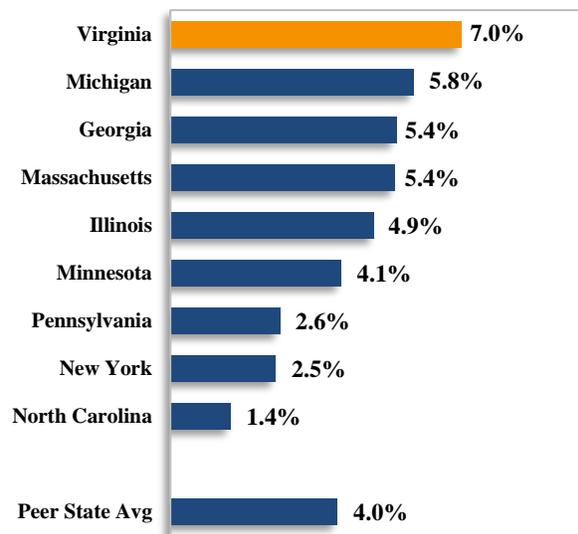
64.2 percent increase in seats, Charlottesville had a 12.2 percent increase, Washington Reagan had a 9.5% increase and Lynchburg had a 1.8 percent increase. Comparing 2015 with 2014, five of the nine airports experienced an increase in the number of seats with the three largest increases found at Washington Reagan, Charlottesville and Norfolk.

**Exhibit 2-4: Change in Seats from Primary Commercial Service Airports**

**Seats: Percent Change 2007 - 2015**



**Seats: Percent Change 2014 - 2015**



Source: Innovata SRS schedule data via Diio Mi

Compared to the eight peer states, only Pennsylvania experienced a greater loss in seats than Virginia in the 2007-2015 period. Pennsylvania had a 15.6 percent loss in number of seats, compared to Virginia at 9.8 percent. However, in comparing 2015 with 2014, Virginia has the greatest rate of increase in seats of seven percent, three points higher than the peer average.

## Benchmarking Virginia's Seven Small and Non-Hub Airports

This section of the analysis focuses on the states' smaller airport performance relative to airport and state peers.

Virginia's small-hub airports of Richmond and Norfolk compare favorably to peers with an average of five carriers serving the two airports. The Commonwealth's non-hub airports of Roanoke, Charlottesville, Newport News and Lynchburg enjoy an average of 2.5 carriers per market as compared to the 1.7 carrier average for all non-hub markets. This compares well and suggests that competition, particularly at Roanoke and Charlottesville, is particularly keen given industry consolidation. Finally, EAS market Shenandoah Valley has one carrier providing service, which is similar to other EAS markets.

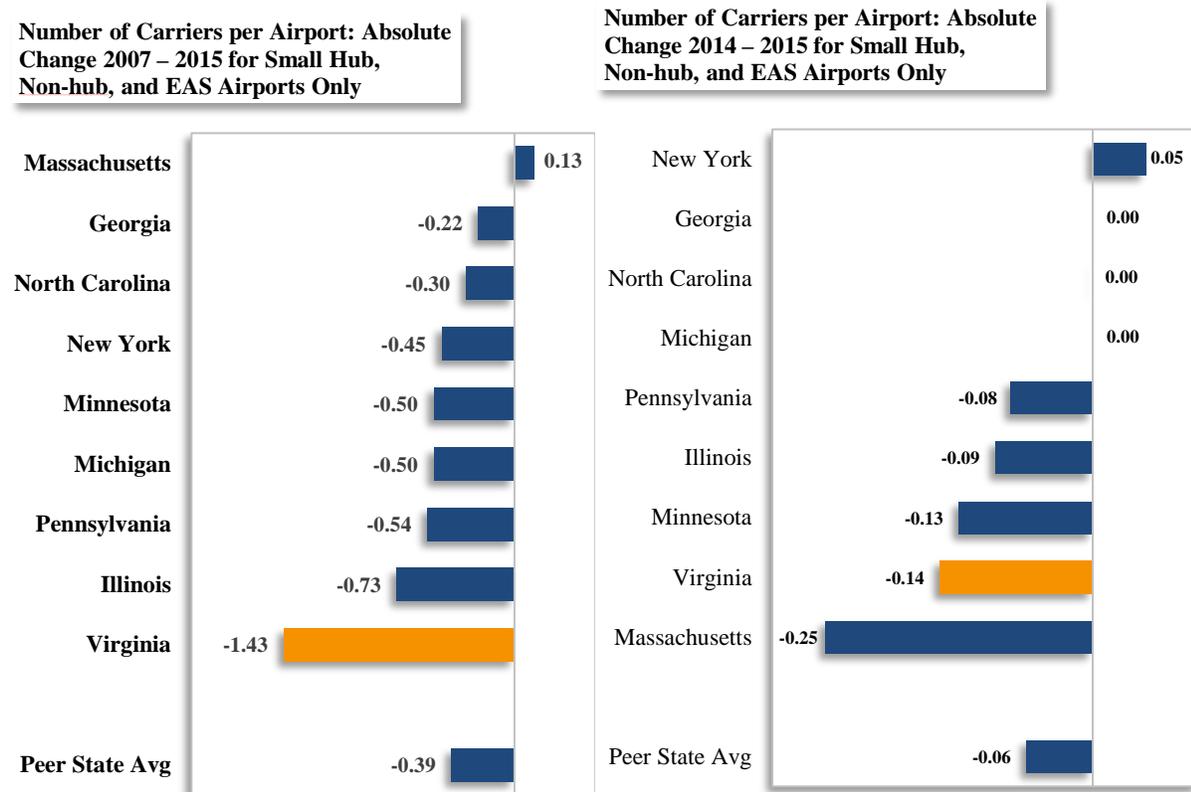
### Exhibit 2-5: Summary Metrics for Small, Non-Hub, and Essential Air Service Airports in Benchmark States

	Number of Carriers per Airport			Number of Nonstop Routes			Departures			Seats		
	Aug 07	Aug 14	Aug 15	Aug 07	Aug 14	Aug 15	Aug 07	Aug 14	Aug 15	Aug 07	Aug 14	Aug 15
Illinois	2.5	1.9	1.8	42	43	45	2,969	2,489	2,400	163,963	127,393	127,407
Massachusetts	1.9	2.3	2.0	27	32	29	6,378	5,376	4,603	86,418	86,161	78,788
Michigan	2.4	1.9	1.9	71	60	59	5,811	4,141	4,164	329,547	287,559	303,402
Minnesota	1.8	1.4	1.3	22	14	13	1,485	894	825	73,014	48,745	44,968
New York	2.9	2.4	2.4	122	105	106	12,735	8,720	8,147	861,785	601,574	592,149
North Carolina	2.3	2.0	2.0	43	39	40	4,943	3,892	3,742	279,862	250,992	253,010
Pennsylvania	2.5	2.1	2.0	51	51	48	4,538	3,268	3,316	206,350	182,986	184,903
Georgia	1.7	1.4	1.4	24	24	26	2,438	2,227	2,115	161,525	153,764	152,082
Peer State Avg.	2.2	1.9	1.9	50	46	46	5,162	3,876	3,664	270,308	217,397	217,089
Virginia	4.4	3.1	3.0	74	57	55	8,669	6,365	6,303	603,140	449,428	461,824

Source: Innovata SRS schedule data via Diio Mi

Virginia’s loss of 1.43 operating carriers at its small- and non-hub airports from 2007 to 2015 reflects the fact that the state has been well served historically and that consolidation is the culprit for losing operators. The marginal decline between 2014 and 2015 is likely not representative of a broader trend, considering the growth in seats and departures experienced in the last year.

**Exhibit 2-6: Change in Number of Carriers per Small Hub, Non-Hub, and EAS Airport**

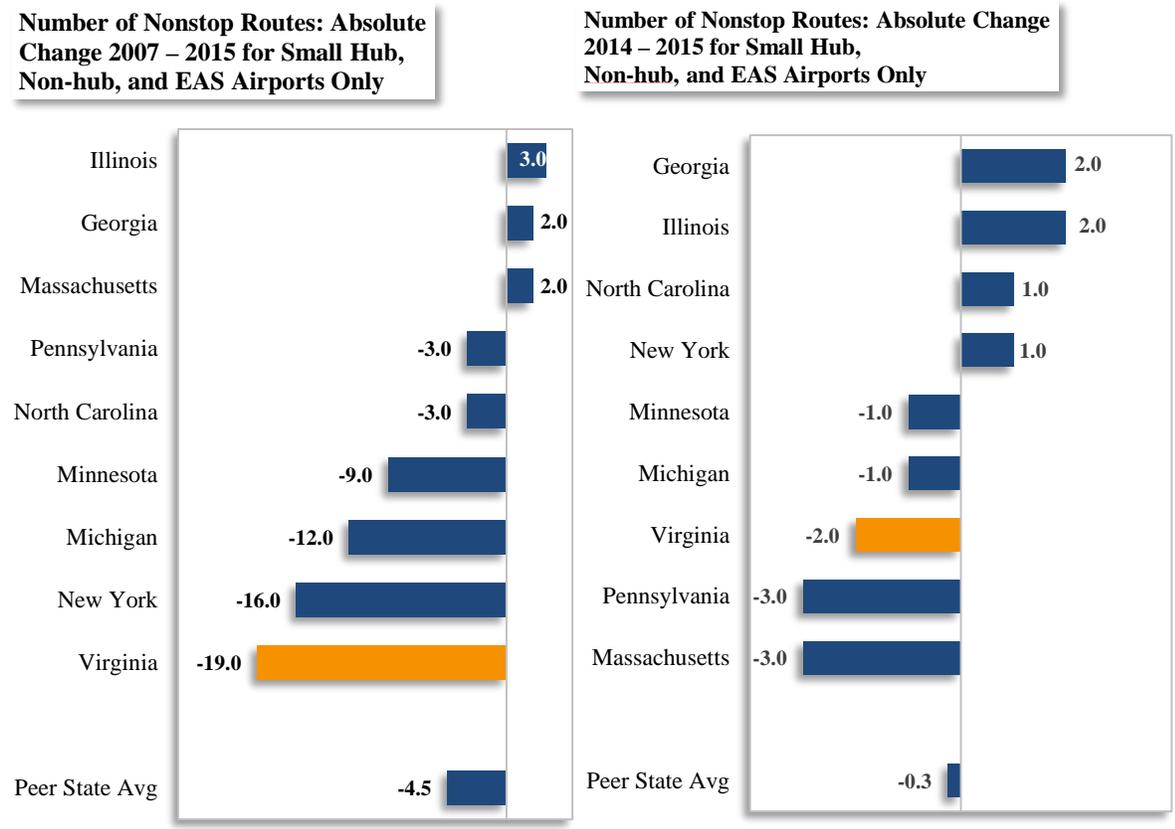


Source: Innovata SRS schedule data via Diio Mi.

The small-hub airports of Richmond and Norfolk account for 10 of the 19 nonstop route decreases between 2007 and 2015. Norfolk lost seven nonstop services over the period and remained stable over the past year. Despite the loss of nonstop services, the two small-hub airports each retained more service than peers. Between 2007 and 2015, Roanoke, Charlottesville, Newport News and Lynchburg each experienced at least one nonstop route loss. Newport News lost five nonstop routes during this volatile period, and again this is largely explained by Southwest’s decision not to continue service from the airport after it purchased AirTran Airways.

Despite these significant losses, Virginia’s non-hub airports still have more service on average than their peers. EAS market Shenandoah Valley has remained constant over both the long and short term horizons analyzed, as would be expected in a federally subsidized market.

**Exhibit 2-7: Change in Nonstop Routes Served from Small Hub, Non-Hub, and EAS Airports**



Source: Innovata SRS schedule data via Diio Mi.

When compared to peer states, Virginia’s small- and non-hub markets lost 19 nonstop routes between 2007 and 2015 – more than any other comparative state. Between 2014 and 2015, only Pennsylvania and Massachusetts have lost more than Virginia, albeit only one more nonstop route. Throughout both periods, Charlottesville held up despite the difficult period for airports of all sizes. An encouraging sign is to see stabilization and even modest growth at the two small-hub airports of Richmond and Norfolk.

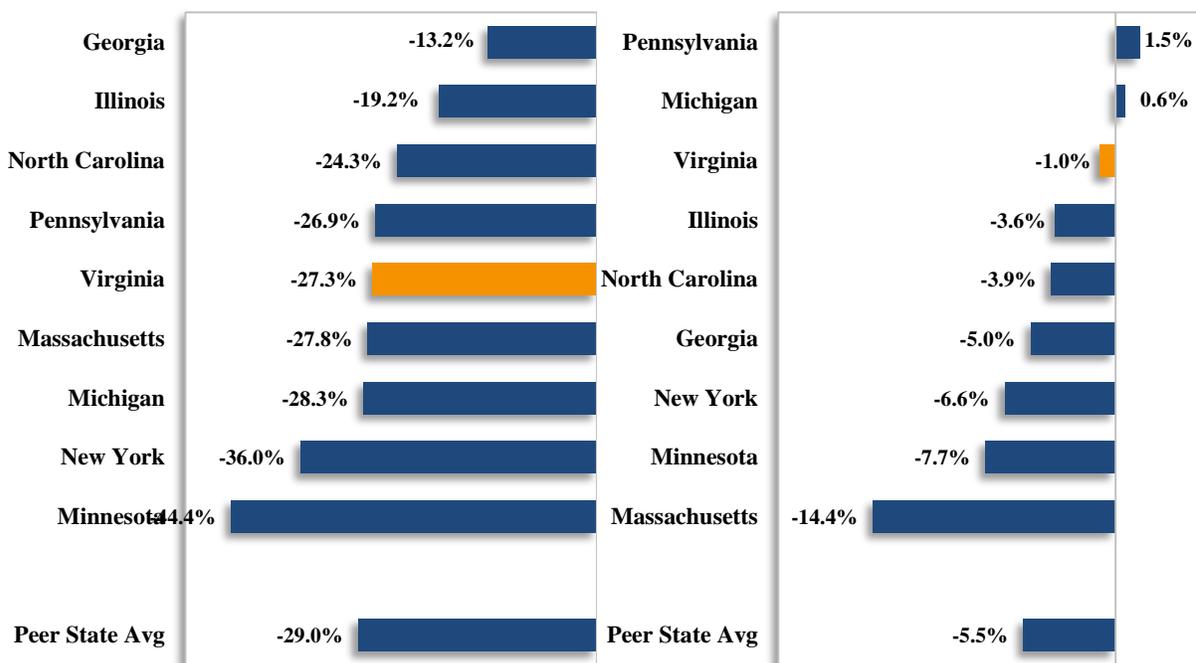
One of the most disconcerting trends for airports around the country has been the decrease in number of departures during the capacity discipline that define the industry following the spike in oil prices in 2008. Virginia’s small hub airports were no exception, as Richmond lost 21.7 percent of its frequencies between 2007 and 2015 and Norfolk lost nearly 29 percent. Despite these losses, Virginia’s two small-hub airports fared better than peers. Both airports show stabilization in comparing 2015 with 2014, even to the point where Norfolk saw an increase of 4.2 percent in frequencies.

Virginia’s non-hub airports performed on par with peer states between 2007 and 2015, with a decrease of 32.2 percent of frequencies. Unlike Virginia’s small hub airports, non-hub airports have performed worse than the nation’s non-hub airports, losing 5.3 percent of departures between 2014 and 2015. The lone exception is Charlottesville. Over both periods, Shenandoah Valley lost fewer frequencies than their EAS airport peers.

**Exhibit 2-8: Change in Departures from Small Hub, Non-Hub, and EAS Airports**

**Departures: Percent Change 2007 – 2015 for Small Hub, Non-hub, and EAS Airports**

**Departures: Percent Change 2014 – 2015 for Small Hub, Non-hub, and EAS Airports**

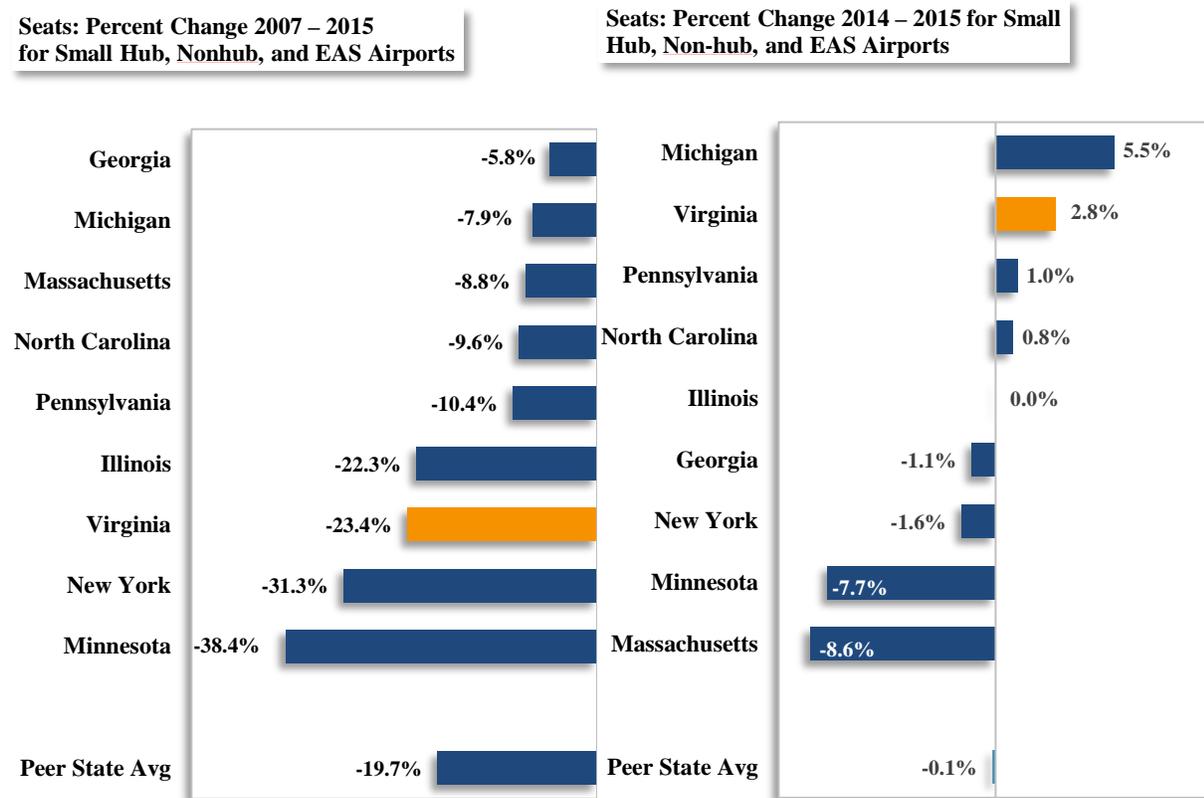


Source: Innovata SRS schedule data via Diio Mi.

On balance, Virginia’s small- and non-hub airports performed slightly better than peers between 2007 and 2015. However, in the 2014 to 2015 period, the Commonwealth’s small- and non-hub airports performed significantly better than peer states, losing only one percent of departures versus a loss of 5.5 percent for other states. The trend seems to suggest that absent any other exogenous shock to the system, Virginia service cuts have slowed and even stabilized.

Whereas Richmond and Norfolk lost 11.6 percent and 25.9 percent respectively of their seats between 2007 and 2015, Virginia’s small-hub airport performance as a whole was better than the small-hub average. Moreover, each of the two airports has experienced significantly more seats than the small-hub average for the 2014 – 2015 period. The performance of the non-hub airports, on the other hand, shows a very different picture for 2007-2015. On the contrary, during the same period, Charlottesville saw an increase of 12.2 percent. Similar to the trend in frequencies, all of the non-hub airports except Charlottesville experienced a decrease in number of seats between 2014 and 2015. This is contrary to the national trend of seat growth and is somewhat concerning. As a subsidized EAS airport, seat growth Shenandoah Valley was relatively stable.

**Exhibit 2-9: Change in Seats from Small Hub, Non-Hub, and EAS Airports**



Source: Innovata SRS schedule data via Diio Mi.

Each of Virginia's peer states also experienced a loss of seats between 2007 and 2015, with only New York and Minnesota losing a greater fraction than the Commonwealth. The peer state average seat loss of -19.7 percent compares to the Commonwealth's average for all small- and non-hub markets of -23.4 percent over the 2007 – 2015 period. On the contrary, between 2014 and 2015, only Michigan's small- and non-hub airports experienced a seat gain greater than Virginia's.

Air service development has been more difficult during the 2007 – 2015 period than at any time since the industry was deregulated. Small regional aircraft are the backbone of air service for many Virginia commercial airports and it is these aircraft flown by the regional airline industry that face many hurdles in the immediate future.

Countless numbers of smaller airports across the country are deeply concerned about their future as a dot on the airline network grid. Many communities have strong underlying economics that suggest that their place on that map is safe. However, as the industry evolves that is not necessarily the case. The real question is whether the network carriers will actually need all of the input from their regional partners to fill mainline aircraft as they serve only bigger and bigger markets in the post-consolidation period.

At risk is service to smaller communities, as airlines gravitate to only the largest markets in a network map that could look much like it did when deregulation began. Taken together with the fact that there is no replacement aircraft for airframes in the 50-seat and less category and the fact that a pilot shortage at the regional level is beginning to lead directly to flight cancellations and service discontinuation at small communities, and there is concern over the sustainability of air service at many of the nation's smallest airports over the coming years.

To counter this trend, many communities and states have turned to air service incentives or subsidies. Subsidizing air service in order to maintain existing flights or attract new service has been used for years with mixed results. Today, risk-averse airlines are reluctant to add service, or continue to fly existing service, that does not at least cover their cost of capital. The next portion of review focuses on national, state, and local programs designed to promote air service development and their successes and challenges over the last decade.

## **Federal and Local Incentive Program Review**

Virginia recognizes the value of air service and seeks to better understand state and airport trends regarding air service development incentive programs. This section focuses on incentive programs targeted toward small- and non-hub airports. Incentive programs included are those offered at the federal level by the USDOT, at the local level from individual airports and a selection of statewide programs. The state program review helps support the broader policy questions and issues that Virginia must evaluate should it choose to pursue a more comprehensive incentive program in the future.

Air service is an important economic development driver that benefits both the communities an airport serves and the state in general. According to a 2011 Economic Impact Study conducted for Virginia, small- and non-hub airports created more than 29 thousand jobs with an estimated \$951 million in payroll for Virginia. These airports led to an economic output of approximately \$3 billion. As an important part of the local and state economy, small and non-hub airport air service is key, providing access to the market for business and visitors, and facilitating trade activity.

Additionally, increasing connections to other airports in the country and the world will continue to enhance the economic impact an airport generates within the state. Yet in today's aviation environment where airlines are focused on profitability, reducing capacity and increasing regional aircraft size, small- and non-hub airports need to be aware of the risks that carriers face when serving a smaller community. Risk mitigation through incentive programs can be offered by the state, an airport, a local authority, or the federal government.

These incentive programs have become a tool that airports can provide to carriers to help develop air service and increase the likelihood for success. Airport incentives to airlines take many forms, including both temporary cost waivers and promotional efforts, and range from revenue guarantees to support from marketing activities for eligible services. There are, however, limits as to what airports can do. Given that there are prohibitions and limitations on using airport funds for revenue guarantees, in most instances they are community guarantees rather than airport guarantees. It's important to create an incentive program that is short-term and provides critical early stage support for new service, frequency, and aircraft opportunities that seem to show a strong likelihood for success based on sound analysis and research.

## **Federal Programs**

Federally funded air service development programs designed for small communities include Essential Air Service (EAS) and, more recently, the Small Community Air Service Development (SCASD) Program. These Federal programs are targeted toward small communities to help maintain a level of air service (EAS) at airports and also develop or enhance scheduled flights (SCASD) throughout the nation.

The EAS program guarantees air service access for small communities in which demand is insufficient for airlines to profitably provide service. Eligibility criteria have become strict over the years and currently include approximately 160 communities that qualify for subsidized service. The program subsidizes the selected airline's costs and guarantees an operating profit. The EAS program typically guarantees two daily frequencies and in most communities this level of frequency is low.

The SCASD program objective is to help small- and non-hub size airport communities enhance and develop air service levels. This program provides funding in response to specific airport grant applications proposed by a state, consortium of airport communities or by a single airport community, and the incentives are broad. Incentives can range from revenue guarantees, fee waivers, marketing and promotion, consultant support, market analysis studies, etc. Program analysis suggests that providing financial incentives, whether in the form of a revenue guarantee or marketing efforts, does not guarantee that new service will be secured or successful. However, it does create a more conducive environment to attract, maintain and enhance new flights. As industry competition continues to increase, a lack of an incentive program—especially in smaller communities—can be a negative. In the last 15 years, carriers have come to expect some help in risk mitigation from most communities once they can demonstrate that a market exists that may potentially be profitable.

As with other communities across the U.S., the overall success of Virginia SCASD grant winners has been mixed, with some communities expending the full allotment of funds resulting in air service improvements and other markets that were unable to use the grant money due to external market factors and carrier consolidation. Two communities have applied for SCASD grants numerous times and been unsuccessful. The overall consensus of Virginia airports is that the SCASD program is an essential element to sustaining air service, and they find it to be an extremely beneficial program.

Some proposed initiatives have included the expansion of new and existing air service to target markets and carriers, marketing and promotional efforts, upgrading aircraft and developing airport shuttle bus service within local communities to increase passenger use. In Virginia, the

SCASD program has been an invaluable resource to support air service development in small communities.

### **Local Airport Programs**

Today, the majority of U.S. airports offer some type of air service incentive program, which allows airports to offer incentives for new service or target destinations within certain guidelines. Generally, the FAA leaves incentive program details up to the airport, so they can contain specific targets (new market, low cost carrier, more frequency, larger aircraft, etc.) or have a general goal (to increase passenger traffic, upgauge aircraft type) and can offer both cost and marketing incentives or just one type. According to a study of airport incentive programs, the principal incentives that airports use to attract airlines include the following:

- Waived or reduced fees
- Marketing and advertising services
- Minimum revenue guarantees
- Travel banks
- Direct subsidies

There are a handful of states that have some type of funded air service incentive program for commercial airports. These programs have focused on their small community airports to help develop their air service as the challenge to maintain flights has become harder.

### **Small and Non Hub Air Service Incentive Programs**

As part of this report, 21 small- and non-hub airports were randomly selected throughout the country to better understand the prevalence of incentive programs and the elements that small communities offer carriers. These small- and non-hub airports represent a geographic sampling of airports across the contiguous U.S.

Of these airports, eighty percent currently have an incentive program that offers a range of cost and marketing incentives. The majority offer a cost incentive as an element to their program and more than 85 percent provide a marketing/promotional incentive. Eighty-two percent of these small communities offer both cost and marketing incentives. The cost incentives most often involve waiving landing fees and terminal rent and, in several cases, include revenue guarantee support.

While incentive programs have become important, they are just one element of the airport's strategy to maintain and attract new service. Having a strong business community, a desirable

destination, and a sizeable local market with demographics and growth to support new service are critical to a carrier's success. For this reason, small- and non-hub airports have had difficulty maintaining service levels despite their incentive programs.

In the early part of the last decade when incentives began to be applied more broadly, carriers would serve a market even if the demand potential was questionable. Most of these risks resulted in unprofitable routes and service cuts or exits once the incentive period was over. However, carriers have become much more sophisticated, selective and smarter about evaluating incentives as part of a much larger picture when analyzing opportunities. Carriers prioritize market opportunities as the primary factor and, although incentives are expected and factored into the assessment, they are not the driving force behind airline market decisions. As such, having an incentive program has not exactly correlated to growth in seats over the last five years.

### **Review of State Air Service Development Incentive Programs**

In addition to federally funded initiatives such as SCASD and EAS, statewide air service incentive programs can be an additional source of funding. This report reviews existing state air service incentive programs, including online literature research of programs or attempts by states to develop a formal structure. The research is followed up with state representative interviews from either the aviation agency or the airports that initiated the effort with state legislature.

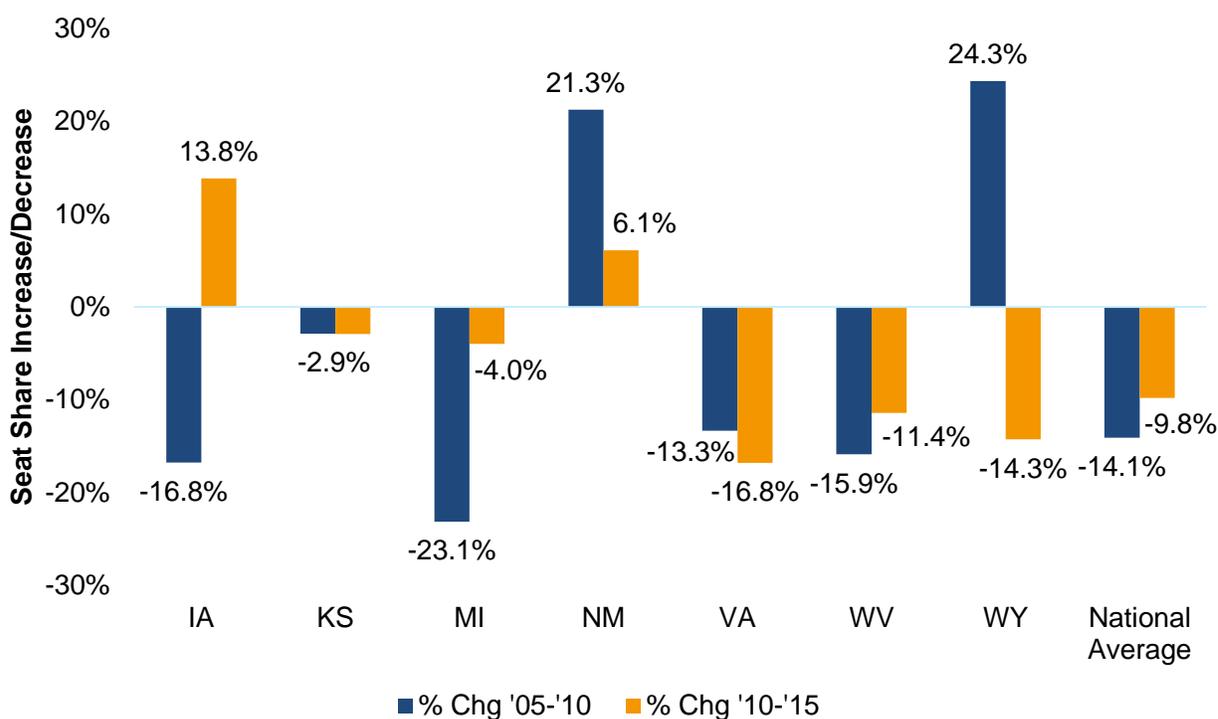
A state incentive program can help enhance existing service and promote new service to a community. This review helps to understand the various programs that each state has structured to support the development of commercial air service.

State air service incentive programs are typically managed through the Aviation division of the state's Department of Transportation, though some states manage their programs through local entities such as the Economic Development Agency. Though state incentive programs are relatively uncommon, they have become increasingly popular in the last decade and have proven to be effective in some communities. This review has helped establish a basic structure for best practices going forward.

Each program is designed to support the circumstances and dynamics of each unique community within the state. Seven states were identified that currently offer an incentive program to their local airports, while four states have attempted to create a program and were unsuccessful. As expected the funding of programs varies in both source and level, however the states consider that the resources have been effective for enhancing commercial air service activity. This section includes an overview of states with successful incentive programs, including Virginia, Iowa, New Mexico, Wyoming, Michigan, West Virginia and Kansas.

To evaluate the impact of the implementation of state programs, a cursory review of one metric, seat capacity, was conducted at U.S. small- and non-hubs and compared the overall service changes between 2005 and 2010 and 2010 and 2015. As shown in Exhibit 4-2, Iowa and New Mexico are the only states with an incentive program where total seat capacity has increased between 2010 and 2015. While there are many factors that influence service/capacity decreases, it appears that certain states have been positively impacted by incentive programs. However, as the exhibit shows, many of the states with incentive programs, including Virginia, still saw losses in seat capacity despite the incentives.

**Exhibit 4-2: Seat Capacity at Small and Non- Hubs in Seven States with Ongoing Incentive Programs, Percent Change 2005-2010 and 2010-2015**



Source: Innovata SRS schedule data via Diio Mi.

Unsuccessful and proposed state programs were also evaluated for Maryland, Louisiana, Nevada, South Carolina and Kentucky.

## Findings, Broader Discussion and Recommendations on Incentive Programs

As regional aircraft continue to be retired and replaced by larger planes, small communities face a real challenge to retain service and passenger levels. Smaller airports within a one to four-hour drive of a large airport are especially at risk and face fierce competition. In more rural states, a six-hour drive to a large hub airport is a threat to a small community.

Of the seven states with an ongoing state incentive program, Michigan's and Virginia's programs have been in effect the longest. The newest program was established in West Virginia in 2008-2009. State program elements range from comprehensive requirements in Wyoming and Michigan to more straightforward structures like West Virginia. Some programs have measurements in place to systematically review results, while others have a less formal process. All states except one (WV) require a local match of funds. A local match helps to share the risk and keep the community engaged with a stake in the game. These programs have been effective when the community is committed to the potential service and have demonstrated their support for the service through financial support. State funding levels vary, with some communities only receiving \$15,000 per year while others are awarded several million dollars in a year.

The research has shown that, among existing state incentive programs, the majority support their small community airports and there is a common belief that these resources have generally been effective and that long-term support is important. Additional funding and annual appropriations are common objectives for each program. It is suggested that existing state programs can provide experience and insight to help enhance Virginia's program, and further discussions with these states will likely prove to be helpful.

### Exhibit 5-1: Summary of State Incentive Program Common Elements

State	Comm. Airports	Mgd by DOA/DOT	Started	Funded	Local Match Required	Cost Waivers	Mktg/Promo	Rev Guar.
IA	8	Y	2005	Aviation fuel tax	Y	Y	Y	N
KS	9	N	2001	General fund	Y	Y	Y	Y
MI	17	Y	1987	Aviation fuel tax	Y	Y	Y	N
NM	9	Y	1999	Gross receipt tax	Y	N	Y	N
VA	7	Y	1980s	Aviation fuel and sales tax	Y	N	Y	N
WY	10	Y	2004	General fund	Y	Y	Y	Y
WV	7	N	2009	General rev. fund	N	N	Y	N

Source: InterVISTAS Consulting.

**Exhibit 5-2: Summary of State Program Budget Elements**

State	Cap Funding/ Annual Budget
<b>IA</b>	\$35k per commercial airport; \$28k state share, \$7k local
<b>KS</b>	Annual budget: \$5m state, \$1.6m City and County split match
<b>MI</b>	\$300k per year
<b>NM</b>	\$250k per airport, no limit on # of times
<b>VA</b>	\$20k per airport; \$500k- Task Force for IAD, DCA
<b>WY</b>	\$2.8m every 2 yrs, \$6m in recent review
<b>WV</b>	\$15k per airport

Source: InterVISTAS Consulting.

In general, incentive programs have helped small communities remain competitive, and in some cases, have resulted in successful attraction of new and/or increased service and traffic. Virginia’s commercial airports have kept pace with the national trend, taking advantage of incentives as a tool to help develop air service. The Commonwealth identified early on that it wanted to prioritize support for commercial air service development, demonstrating the state’s proactive position toward its aviation system. In addition, Virginia’s commercial airports have utilized SCASD grants since the inception of the program; many have been successful in securing funds and have used these resources to help improve air service activity. Although some results have been mixed, several airports have experienced real improvement.

The review of other small community and state programs has identified some best practices, key principles and techniques that can be used to offset start-up costs for airlines, add destinations to specific markets, and maintain affordable airfare. Although incentives are not the leading factor for attracting and developing air service, there is growing agreement that it is necessary for communities to demonstrate to carriers they will help offset the risk of new service.

It appears that successful state programs start with a commitment to the airports and a partnership with communities, including a vision that commercial air service is good for business statewide and that effort and investment are necessary. It is also apparent that good state programs develop metrics, systems or reporting procedures to help document and measure development, and that improvement is quantitative and qualitative in nature. Measuring development helps states as they try to secure future funding and provides political decision makers with information on how airport constituents are benefitting from an incentive program. Tracking the effectiveness can also

provide valuable feedback and insight from airports in the evolution of the airline industry demands, and can help a state respond better within its incentive program to new issues that arise.

It is difficult to predict the future of these incentive programs given the uncertainty of market changes, funding, expiration clauses and potential lack of political support. However, it is clear the greater Virginia aviation community has been working together to find implementable solutions and that the Commonwealth and its commercial airports are committed to air service development efforts. Starting from a committed position will help the program weather the industry's future challenges.

## **CONCLUSION**

The Virginia Commercial Air Service Strategic Review 2015 analyzes trends in the Commonwealth's commercial air service from 2005-2014, as compared to the national average and to peer airports across the country. During this period, several key industry trends affected all U.S. service, including a global recession that triggered airline bankruptcies and the resulting consolidation down to just four national carriers. Other impacts include government sequestration, up-gauging (the airline practice of providing fewer, larger planes in order to operate fuller aircraft, which reduces the number of available flights), the declining availability of pilots and capacity discipline (the airline practice of deferring growth to meet revenue requirements).

Despite recent economic growth, there is no foreseeable change in airline practices due to continuing pressure to maintain revenue growth and profitability. In addition, airlines are focusing their limited growth initiatives around key hubs, which include Dallas/Fort Worth for American Airlines, Seattle for Delta Airlines and San Francisco for United Airlines. Finally, the capacity discipline issue is significantly affecting small regional jets, and sixty percent of Virginia's scheduled departures are on small regional jets. To address these industry trends, each state will need to work with the airlines to identify and develop unique, state-specific solutions to increase their air traffic and revenue growth.

From 2005-2014, Virginia did not recover from the global recession quite as quickly as the national average, however the Commonwealth remains competitive and has several key strengths that could lead to future growth. Virginia's growth in international departures exceeds the national average, it offers non-stop or one-stop service to many domestic destinations, and each Virginia airport is served by at least one national carrier or its affiliates.

Some potential focus areas for improvement include a more detailed air service strategy to cultivate United Airlines' hub at Dulles International Airport, address Virginia's increasing reliance on American Airlines (particularly with their acquisition of US Airways) and manage the impact of the decline in regional jet service. There are also several models for air service incentives

across the country, and while Virginia already has a leading air service incentive program, there could be opportunities to stimulate growth through targeted incentive solutions that focus more specifically on the key air service challenges identified in this report.

This strategic review provides an essential overview of Virginia's air service performance compared to the national average and peer airports over the past decade, in addition to identifying the key industry trends that will continue to affect air service in the future. Together, this information provides a framework for the development of a detailed Virginia Air Service Action Plan to establish and maintain a leading, competitive position that delivers exceptional commercial air services for the Commonwealth and the traveling public.



# VIRGINIA COMMERCIAL AIR SERVICE STRATEGIC REVIEW

## Chapter 1 – Review of Air Service Trends in the Commonwealth of Virginia

Prepared for  
**Commonwealth of Virginia,  
Virginia Department of Aviation**

Prepared by

**InterVISTAS**

a company of Royal HaskoningDHV



March 20, 2015

# Contents

<b>1. Introduction to the Virginia Commercial Air Service Strategic Review .....</b>	<b>1</b>
1.1 Structure of the Virginia Commercial Air Service Strategic Review.....	2
<b>2. Introduction.....</b>	<b>3</b>
2.1 Structure of this Chapter.....	5
<b>3. The Evolution of Commercial Air Service in the United States from 2005 to 2014.....</b>	<b>6</b>
<b>4. Statewide Air Service Trends in the Commonwealth of Virginia, 2005-2014 .....</b>	<b>19</b>
<b>5. An Analysis of Service Trends at Individual Virginia Airports .....</b>	<b>35</b>
5.1 Charlottesville-Albemarle Airport (CHO).....	35
5.2 Ronald Reagan Washington National Airport (DCA).....	37
5.3 Washington Dulles International Airport (IAD).....	40
5.4 Lynchburg Regional Airport (LYH).....	42
5.5 Norfolk International Airport (ORF).....	44
5.6 Newport News Williamsburg International Airport (PHF) .....	45
5.7 Richmond International Airport (RIC).....	47
5.8 Roanoke-Blacksburg Regional Airport (ROA) .....	49
5.9 Shenandoah Valley Regional Airport (SHD) .....	51
<b>6. Future Trends in Commercial Air Service in the Commonwealth of Virginia .....</b>	<b>54</b>

# 1. Introduction to the Virginia Commercial Air Service Strategic Review

This document represents the first of three chapters in the Commonwealth of Virginia's Commercial Air Service Strategic Review, prepared for the Virginia Department of Aviation (DOAV) in 2015. The Air Service Strategic Review was commissioned by DOAV to analyze the commercial air service successes and challenges faced by the Commonwealth of Virginia and its airports, and to recommend comprehensive strategies to maintain, develop, and grow air transportation services within the Commonwealth.

The Commercial Air Service Strategic Review explores in detail air service trends and strategies at the nine primary commercial service airports<sup>1</sup> within the Commonwealth of Virginia. These airports span multiple geographies within the Commonwealth, and range in size from large hubs for major world airlines to smaller, regional airports with just one or two destinations. Regardless of size or geography, each of Virginia's airports fits into a larger narrative of commercial air service within the Commonwealth of Virginia, the United States, and the world. The role that each of Virginia's airports has to play within this global air transportation narrative is explored in greater detail throughout this study.

## Exhibit 1-1: Primary Commercial Service Airports in the Commonwealth of Virginia



---

<sup>1</sup> A primary commercial service airport, as defined by the Federal Aviation Administration (FAA), is an airport that handled at least 10,000 passengers in the prior calendar year. In this document, the most recent definition of primary commercial service airports was used, encompassing data from the 2013 calendar year.

## 1.1 Structure of the Virginia Commercial Air Service Strategic Review

The Virginia Commercial Air Service Strategic Review is divided into three chapters, as shown in Exhibit 1-2. Each of these chapters focuses on a specific facet of commercial air transportation within the Commonwealth of Virginia. Together, the chapters present a holistic review of air transportation within the Commonwealth and describe strategies and approaches that Virginia's airports can take to enhance their connections to the global air transportation system.

### Exhibit 1-2: Structure of the Virginia Commercial Air Service Strategic Review

#### CHAPTER

1

#### **Review of Air Service Trends in the Commonwealth of Virginia**

Explore trends in air transportation service at Virginia's airports

2

#### **Air Service Vulnerability Benchmarking Analysis**

Analyze strengths and vulnerabilities in terms of service, fares, and connectivity, and compare Virginia's performance to other states

3

#### **Strategic Assessment for Virginia's Small Hub and Non-Hub Airports**

Review of incentive programs and strategies for Small and Non-Hubs

The chapters of the Virginia Commercial Air Service Review are described below:

- **Chapter 1 – Review of Air Service Trends in the Commonwealth of Virginia** explores national, statewide, and local trends within the United States over the last decade, from 2005-2014. This period was a time of tremendous change within the U.S. domestic airline industry as U.S. carriers saw mixed financial performance and entered into a limited growth period that industry observers have referred to as “capacity discipline.” These trends have affected airports within the Commonwealth of Virginia in diverse ways. This section reviews how Virginia’s airports have mirrored and responded to national trends in air transportation over the last ten years, and provides an airport profile for each of Virginia’s nine primary commercial service airports.
- **Chapter 2 – Air Service Vulnerability Benchmarking Analysis** compares the trends in traffic, connectivity, and service levels identified in Chapter 1 to other peer airports and peer states in the U.S. First, a benchmarking analysis is completed to identify the airports and states that are most comparable to Virginia and its airports. Then, indexing approaches are used to compare Virginia’s airports’ performance to these peers. The areas in which Virginia outperforms and underperforms its peers are identified and explored in detail. This section helps to identify the key focus areas that a comprehensive air service strategy could target in detail.
- **Chapter 3 – Strategic Assessment for Virginia’s Small Hub and Non-Hub Airports** provides an in-depth look at service at Virginia’s Small Hub and Non-Hub airports.<sup>2</sup> These airports each have unique service patterns and trends that need to be examined individually. Additionally, smaller airports nationwide have been disproportionately affected by many of the service cuts as a result of the capacity discipline period. Smaller airports have responded through a variety of innovative approaches, including incentive programs, alternative airlines, and other strategies. In this section, strategies for air service maintenance and growth are reviewed for small airports throughout the country, and strategies that could be particularly effective in Virginia are highlighted. This section also reviews the performance of air service development strategies at Virginia’s Small Hub and Non-Hub airports over the last decade.

---

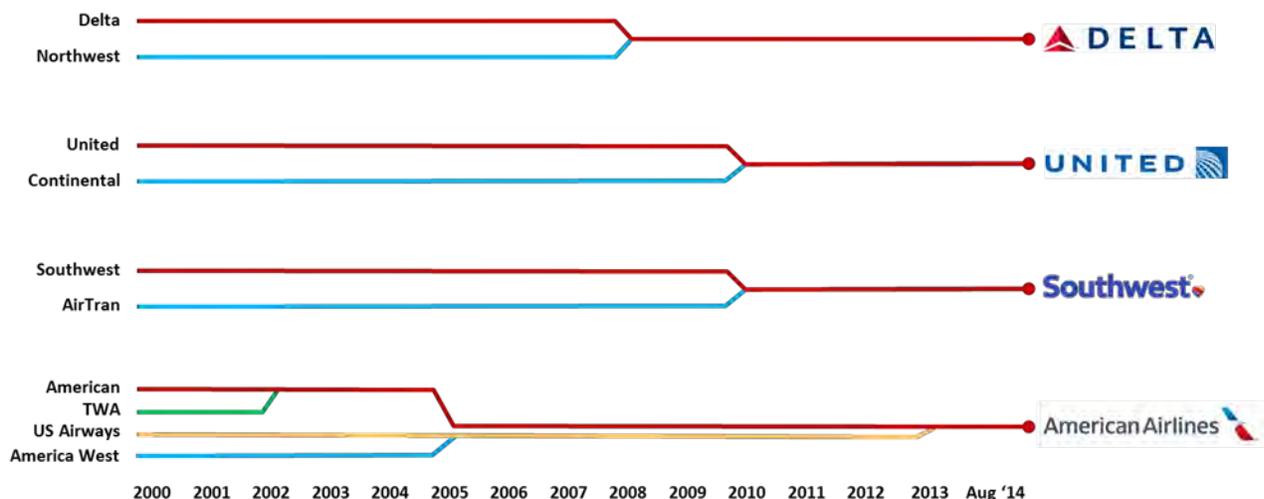
<sup>2</sup> The Federal Aviation Administration (FAA) designates each primary commercial service airport in the United States with one of four “hub types.” The four hub types are Large Hub, Medium Hub, Small Hub, and Non-Hub. Note that these FAA hub types, which are defined by the number of passengers enplaned at the airport in the previous year, are for descriptive use only and should not be confused with the concept of an airline hub. For instance, Richmond International Airport (RIC) was designated as a Small Hub airport in 2013 but was not the hub of any major commercial carrier.

In sum, the Virginia Commercial Air Service Strategic Review serves as a living document that can continue to be revised and updated by stakeholders as air service trends change and evolve nationally and within the Commonwealth.

## 2. Introduction

The ten-year period from 2005-2014 represents one of the most turbulent periods in the U.S. airline industry in recent memory. That period saw a worldwide recession that contributed to several large U.S. airlines filing for bankruptcy, supply shocks that led to a significant upward movement in the price of fuel, mergers of several iconic airline brands, and an overall movement towards restrained growth. Ultimately, the domestic airline industry by the end of 2014 was one that was more consolidated (and also more profitable) than the industry that preceded it a decade before. Over 85 percent of available seat-miles in the U.S. domestic industry are now concentrated in the hands of just four carriers – Delta Air Lines, United Airlines, American Airlines, and Southwest Airlines. Exhibit 2-1 shows a timeline of this consolidation in the U.S. airline industry since 2000.

**Exhibit 2-1 – Timeline of Consolidation in the U.S. Airline Industry, 2000-2014**



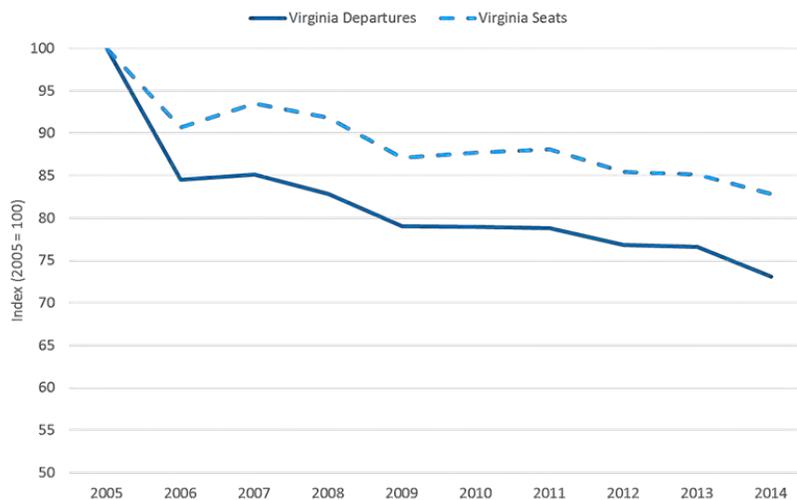
Note: Consolidation based on year that merger was announced.

This trend of industry consolidation was coupled with a significant cutback in capacity as a result of economic pressures and rising fuel prices. In this new industry environment, airlines removed a significant portion of flights operated by small, 37-50 regional jets, which typically served both smaller airports and shorter-haul routes of 500 miles or less. Between 2005 and 2014, airlines cut 38.7 percent of departures on these small regional jet aircraft from U.S. airports, and Virginia itself saw a 47.4 percent reduction in departures operated by small regional jets.

Despite recent economic growth, certain industry trends have prevented available capacity from recovering to pre-recession levels. A strategy of airline “capacity discipline,” which is explored in detail later in this chapter, has limited growth in departures and seats. This strategy has had significant effects on the airline industry nationwide, including the Commonwealth of Virginia. Additionally, a looming pilot shortage threatens to further limit growth in regional jet service—as pilots employed by “mainline” carriers such as American, Delta, and United begin to retire, these pilots are often replaced by pilots from the regional sector. However, due to new regulations and a lack of new pilot candidates, regional carriers may have trouble hiring enough replacement pilots. Some regional jet service reductions have already been attributed to this pilot shortage.<sup>3</sup>

Just as 2005-2014 was a period of significant change and turmoil throughout the industry, so too did Virginia’s primary commercial service airports face the effects of a consolidated industry that was growing much less quickly than in past decades. Scheduled departures fell by 26.9 percent at Virginia’s primary commercial service airports from 2005-2014, and available seats were reduced by 17.2 percent over the same period.

**Exhibit 2-2: Index of Scheduled Departures and Available Seats at Virginia Airports, 2005- 2014 (2005 = 100)**



Source: Innovata SRS schedule data via Diio Mi.

<sup>3</sup> See, for instance, Jeff Smisek’s February 1, 2014, letter to United Airlines employees at Cleveland Hopkins International Airport regarding the closing of United’s hub at the airport: “The timing of the flight reductions [at Cleveland] has been accelerated by industry-wide effects of new federal regulations that impact us and our regional partner flying.”

The reductions in scheduled air transportation services at Virginia’s airports highlight the struggles that airports nationwide faced in attracting and maintaining air service over the last decade. To counter these trends, the underlying business, strategic, and economic factors behind the reductions in service at Virginia’s airports need to be understood from a system-wide perspective.

## **2.1 Structure of this Chapter**

In this chapter, national, regional, and local trends in air transportation are explored from the perspective of Virginia’s airports. First, in Section 3, air service trends in the Commonwealth of Virginia are explored. Across the Commonwealth, trends in enplaned passengers, departures, seats, fleet mix, hub reliance, and connectivity are considered and compared to the national average. The effects of airline consolidation and mergers on Virginia’s airports are also considered in detail. Then, in Section 4, a holistic review of airline industry trends in the United States from 2005-2014 is undertaken. The driving factors behind the industry consolidation and limited growth (or “capacity discipline”) seen towards the end of the decade among large airlines in the United States is explored in detail.

Finally, in Section 5, a deep dive into service trends at individual Virginia airports is conducted. For each of the nine primary commercial service airports in Virginia, individual trends in traffic, service, connectivity, and hub reliance are explored. This section highlights how each airport in Virginia has a unique story to tell about how it weathered the challenging airline industry conditions during the last ten years. Section 6 concludes by looking forward at what to expect in the short- and medium-term in the national air transportation system, and how these trends will likely affect the Commonwealth of Virginia.

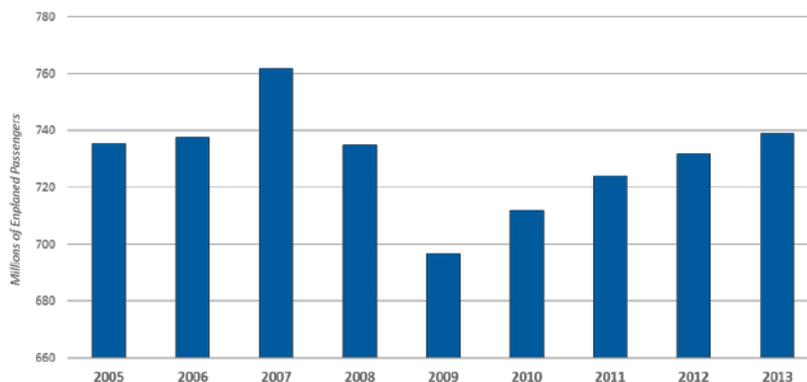
### 3. The Evolution of Commercial Air Service in the United States from 2005 to 2014

In this section, trends in enplaned passengers, scheduled departures, available seats, fleet mix, and connectivity are first explored from a national perspective. The data show that starting in 2007, the national air transportation system in the United States moved into a period of decline and stagnation from which, in some cases, the nation has still not yet fully recovered. Contributing factors to this decline since 2007 are then discussed in detail. Finally, a forward-looking analysis is conducted to explore how the U.S. airline industry might continue to evolve over the next five years.

#### Nationwide, Enplaned Passenger Traffic Has Only Recently Recovered to 2005 Levels

2005 represented a period of relative strength for the U.S. economy, and, in concert, for the U.S. air transportation system. Despite the financial struggles of some network carriers, the air transportation system was in the midst of a growth mode. As shown in Exhibit 3-1, enplaned passengers in the United States increased by 3.6 percent from 2005 to 2007 as carriers—particularly low-cost carriers like Southwest Airlines, AirTran Airways, and JetBlue Airways, added capacity into the domestic marketplace.

#### **Exhibit 3-1: Enplaned Passengers at Primary Commercial Service Airports in the U.S.<sup>4</sup>**



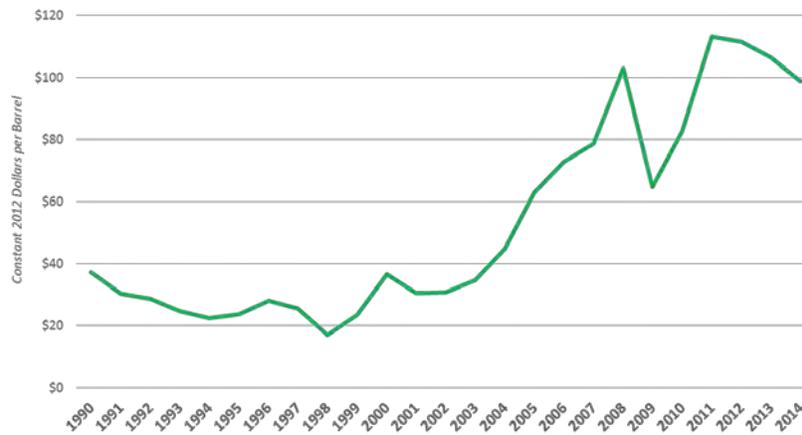
Source: FAA Air Carrier Activity Information System (ACAIS).

<sup>4</sup> Note: 2013 is the most recent year for which a full year of data was available.

Following 2007, however, several economic factors combined to result in a reduction of over 60 million enplaned passengers over the course of just two years. First, an economic downturn, known popularly as the Great Recession, resulted in a broad reduction in economic activity throughout the United States and the world. Since air transportation demand is closely tied to economic activity, the recession created a demand shock that contributed to the reduction in enplaned passengers at U.S. airports.

Additionally, along with the reduction in economic activity and air transportation demand, fuel prices sharply spiked between 2007 and 2009, and also became highly volatile. The gap between the price of crude oil and the price of jet fuel, also known as the *crack spread*, also widened during this period. The rise in the price of oil affected air transportation in the U.S. in two ways: first, since fuel is a significant driver of airline costs, high fuel prices resulted in a reduction in the supply of air transportation in the U.S., as shown in Exhibit 3-2 and Exhibit 3-3.

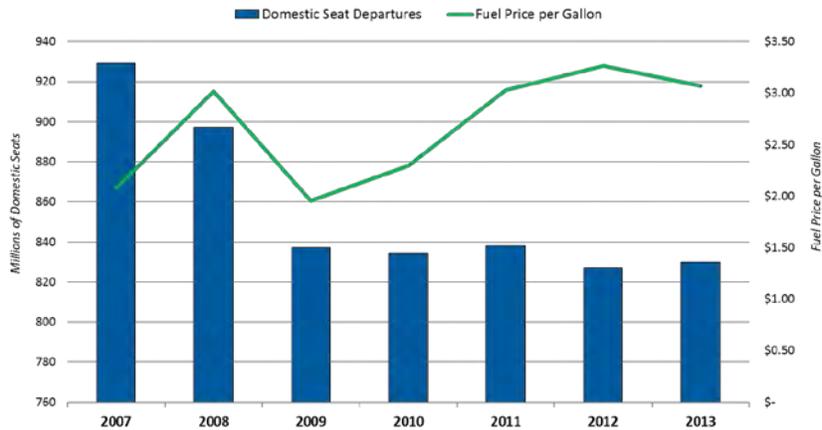
**Exhibit 3-2: Average Spot Prices per Barrel of Crude Oil in Constant 2012 Dollars, 1990-2014**



Source: Energy Information Administration.

Furthermore, the increase in jet fuel prices also affected household wealth. As customers started spending more money on energy costs, fewer dollars remained available for air transportation products. Therefore, the increase in fuel prices caused both a supply shock and a demand shock to the U.S. air transportation industry.

### Exhibit 3-3: Available Domestic Seats and Price Paid per Gallon of Jet Fuel, 2004-2013



Source: BTS T-100 data via Diio Mi and BTS Form 41 Data via BTS Transtats (Fuel prices).

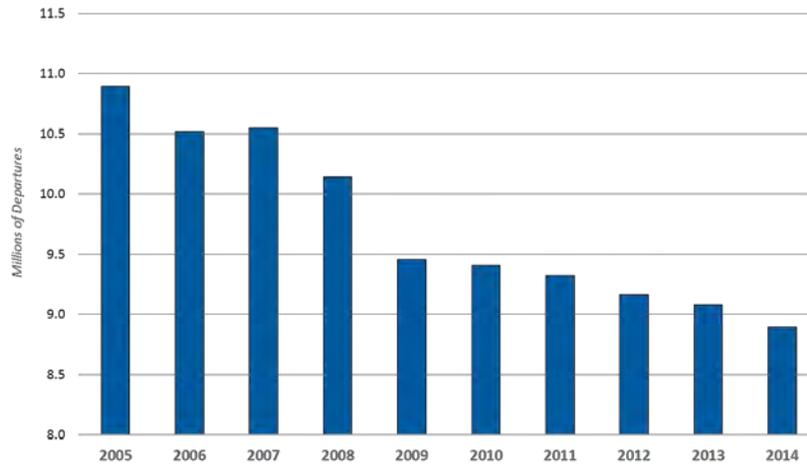
Following the upward shock to the price of fuel and the downward shock to air transportation demand, passenger traffic in the U.S. has slowly started to recover along with the U.S. economy, as shown in Exhibit 3-1. However, for reasons that are discussed in the next section, the U.S. carriers have not responded by growing capacity to match this increase in demand. This has prevented many U.S. airports from seeing a recovery in aircraft operations or available domestic seats to match levels seen before the recession.

#### **Available Departures and Seats Have Not Recovered to Pre-Recession Levels**

Although enplaned passenger traffic at U.S. airports has largely recovered to pre-recession levels, the U.S. air transportation system is still seeing fewer departures and seats than during the system's peak in 2005. Exhibit 3-4 shows how total departures have continued to fall from 2005 to 2014, with a significant reduction between 2007 and 2009 of over one million departures.

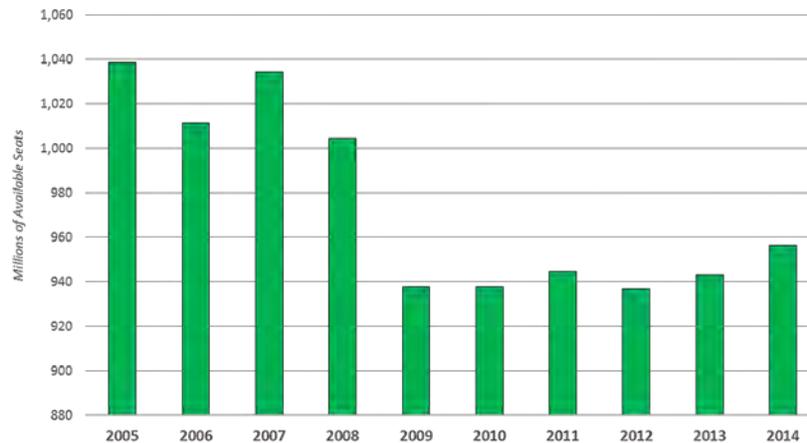
Additionally, Exhibit 3-5 shows the reduction in available seats during the same time period. Note that just as departures fell dramatically from 2007 to 2009 as a result of the recession and high fuel prices, so too did available seats. However, even as departures have decreased in recent years, seats have started to climb as a result of increased aircraft size.

**Exhibit 3-4: Scheduled Departures at U.S. Airports, 2005-2014**



Source: Innovata SRS schedule data via Diio Mi.

**Exhibit 3-5: Available Seats at U.S. Airports, 2005-2014**



Source: Innovata SRS schedule data via Diio Mi.

**Capacity Restraint Has Affected Airline Deployment of Capacity**

It is worthwhile to note several trends in departures and available seats since the recession ended in 2010. First, note that neither departures nor available seats have recovered to pre-recession levels, despite growth in the U.S. economy and the recovery of air transportation demand. This is due primarily to a new strategy of capacity management undertaken by the U.S. carriers in response to the financial pressures of the recession and high fuel prices. Instead of growing

capacity in response to economic growth, as had been the case in previous business cycles,<sup>5</sup> U.S. airlines have recently decided to keep capacity growth relatively flat. This strategy has been referred to by industry observers as “capacity restraint”<sup>6</sup> or “capacity discipline.”<sup>7</sup>

Capacity restraint is an attractive strategy for airlines for at least two reasons. First, restricting capacity allows carriers to cut unprofitable routes and focus only on the most financially successful operations. Cutting unprofitable routes allows carriers’ financial performance to improve, particularly in times of high fuel prices. Additionally, restricting capacity puts upward pressure on load factors, a measure of the percentage of filled seats on an average departure. As available capacity remains constant while demand grows, airlines are able to use modern revenue management techniques to increase fares for this limited supply of seats. Therefore, airline yields and load factors can both increase at the same time.

U.S. airlines have been deliberate in their signaling to each other through press releases on their intent to keep the capacity restraint strategy active in the near future. Specifically, even though fuel prices have recently moderated to below USD\$50 per barrel, airlines continue to promote the idea of capacity restraint. As United Airlines CEO Jeff Smisek said in a 2015 earnings call with investors, “the U.S. airline industry has transformed itself over the last several years through consolidation and matching capacity with demand, and United will continue its discipline regardless of the price of oil.”<sup>8</sup> Delta and American have issued statements to similar effect.

Ultimately, capacity restraint strategies translate to fuller planes and higher pressure on the landside portion of airport facilities, whereas airside demand pressures remain lighter in comparison. That is, passenger numbers are still forecast to increase, but operations numbers are forecast to increase by a lesser degree.

---

<sup>5</sup> There is a strong correlation between growth in U.S. GDP and growth in both revenue passenger-miles (RPMs) and available seat-miles (ASMs), two common measures of air transportation activity and capacity, respectively.

<sup>6</sup> See, for instance, U.S. Government Accountability Office. 2014. The Average Number of Competitors in Markets Serving the Majority of Passengers Has Changed Little in Recent Years, but Stakeholders Voice Concerns about Competition. Report No. GAO-14-515.

<sup>7</sup> See, for instance, Baker, M.B. 2015. Airlines Pledge Pricing, Capacity Controls Despite Fuel Savings. Business Travel News 10 March 2015.

<sup>8</sup> Ibid.

### Smaller Airports Saw a Greater Proportion of Cuts

Overall, smaller airports were more affected by reductions in available capacity than were larger airports. Exhibit 3-6 breaks down the change in domestic departures from 2005 and 2014. While all airport types saw a decline in service, the decline at Medium Hub, Small Hub, and Non-Hub airports outpaced those at Large Hub airports.

**Exhibit 3-6: Percent Change in Domestic Flights by Hub Type, 2005-2014**

Airport Type <sup>9</sup>	% Change in Domestic Flights (2005-2014)
Large Hub	<b>-10.8%</b>
Medium Hub	<b>-33.4%</b>
Small Hub	-28.4%
Non-Hub	<b>-27.2%</b>
All Smaller Airports	-31.4%
All Airports	<b>-20.3%</b>

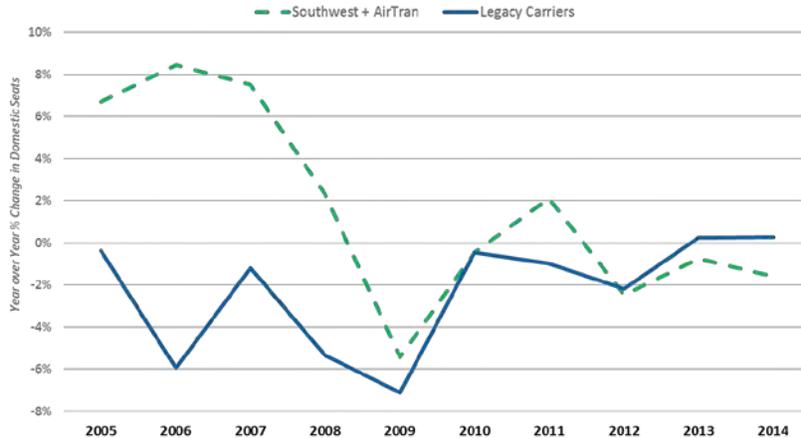
Source: Innovata SRS schedule data via Diio Mi.

There are several reasons for this disproportionate effect on smaller airports of airline capacity reduction strategies. First, de-hubbing generally affected medium-sized airports like Cincinnati and Cleveland; these hubs contributed to the significant decline among Medium Hub airports. Additionally, Southwest Airlines, an airline which had traditionally served secondary airports in regions with more than one airport, redefined its strategy to focus more on large airports. Southwest entered several large airports during the period from 2007-2014, all while reducing capacity at smaller airports. Exhibit 3-7 shows how Southwest, which had been growing as legacy carriers were in the midst of bankruptcies and mergers before 2009, joined the larger airlines in restraining capacity growth following 2009.

---

<sup>9</sup> The airport types listed in this table are based on hub types defined by the Federal Aviation Administration based solely on the number of passengers enplaned at an airport in the previous year as a percentage of passengers enplaned at all U.S. airports. For instance, Large Hub airports enplaned at least 1% of passengers enplaned at all airports in the previous year, Medium Hubs enplaned between 0.25% and 1% of such passengers, Small Hubs enplaned between 0.05% and 0.25% of such passengers, and Non-Hubs enplaned fewer than 0.05% but at least 10,000 passengers. These definitions should not be confused with the concept of an “airline hub” that serves as a connecting point for passengers with multi-leg itineraries. In this table, All Smaller Airports refers to airports that are ranked as Medium Hubs or below.

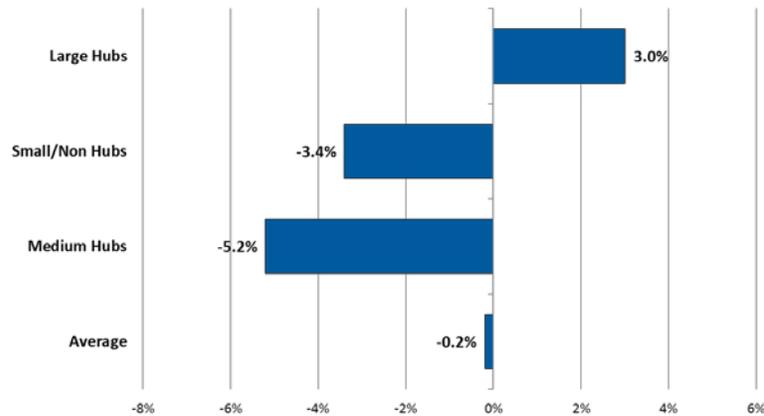
**Exhibit 3-7: Southwest Airlines, AirTran Airways, and Legacy Carrier Percent Change in Domestic Seats, 2005-2014**



Source: Innovata SRS schedule data via Diio Mi.

As a result of the changes in service at smaller airports in the United States, the recovery in passenger growth has been more robust at larger airports than smaller ones. Exhibit 3-8 shows that since the trough of the Great Recession in 2008, Large Hub airports have been the only airport type to see domestic passenger growth. Overall, domestic origin-destination (O&D) passenger traffic levels have largely retained their 2008 lows.

**Exhibit 3-8: Percent Change in Domestic O&D Passengers, CY 2008 vs. Year Ended 3Q 2014**



Source: US DOT DB1B O&D Survey data via Diio Mi.

## **System Wide Up-gauging Will Generally Affect Smaller Markets**

Along with the capacity restraint strategy practiced by U.S. airlines, note from Exhibits 3-4 and 3-5 that the number of available departures has declined since 2007, yet the number of available seats has increased over the same time period. This is indicative of another important trend to monitor in the U.S. aviation industry—one of up-gauging<sup>10</sup> and a move away from the 37-50-seat regional jets that have typically served smaller markets.

In many small markets in 2005, the smaller regional jet, such as the Canadair CRJ-100 and -200 series and the Embraer ERJ-135, -140, and -145 series, was a workhorse that provided connecting service to many regional hubs. In 2005, these aircraft operated nearly three million flights from U.S. airports. However, by 2014, these aircraft had fallen out of favor among regional operators, mostly due to high operating costs in an environment of high fuel prices. In 2014, only 1.8 million flights were operated using smaller regional jets, a reduction of over 38 percent.<sup>11</sup>

In markets where smaller regional jet service had previously existed, one of three results has occurred:

- First, in some strong markets, 50-seat jet service has been replaced by 76-seat jet service, often at a reduction in frequencies. However, not all markets have the economic fundamentals to support such service;
- In some of these smaller markets, carriers such as Great Lakes Airways or Silver Airways have entered the market to provide service on small Beechcraft aircraft; and/or
- In some markets where only smaller regional jet service was present, service to one or more destinations has seen reduced frequencies or been removed entirely.

Additionally, a wave of mainline carrier retirements and a new federal rule that increases the qualifications necessary to become a commercial airline pilot, in addition to labor market pressures, have left the regional industry with a shortage of qualified pilots. This could also lead to a reduction in smaller regional jet service moving forward, and could particularly effect markets

---

<sup>10</sup> Up-gauging refers to an increase in the size of the aircraft serving a route. A decrease in the size of aircraft serving a route is known as *down-gauging*.

<sup>11</sup> According to schedule data from Innovata SRS via Diio Mi.

that currently have 37-50 seat regional jet service but are unlikely to have the economic fundamentals to support 51-76 seat regional jet service.<sup>12</sup>

### **International Service Has Expanded Despite Limited Domestic Growth**

Although overall departures and seats have fallen during the period from 2005 to 2014, domestic and international service has not responded in identical ways. Indeed, international growth has been relatively strong during the period, as shown in Exhibit 3-9. While the index of domestic seats has fallen since 2005 and has not recovered, international seats have shown significant growth. While international service was affected during the recession period from 2007 to 2009, it has since recovered to surpass its pre-recession peak.

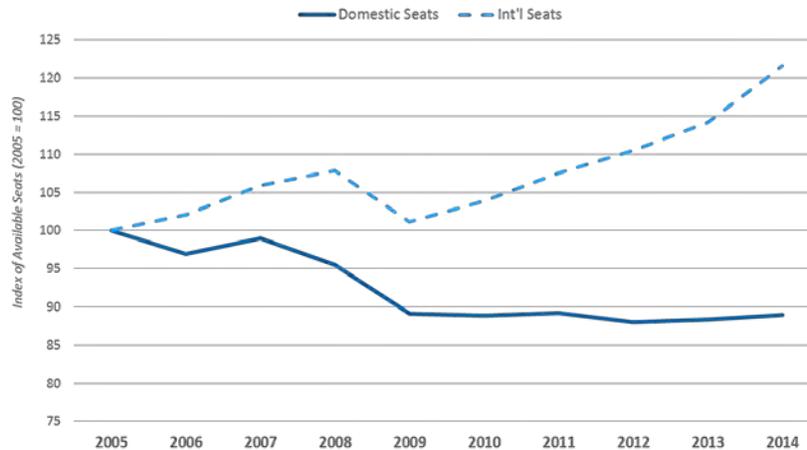
The growth in international seats has come both from the U.S. legacy carriers increasing their international portfolios at new gateways<sup>13</sup> and from foreign-flag international carriers entering new markets. The Gulf carriers—Emirates, Etihad Airways, and Qatar Airways—are good examples of this growth. The Gulf carriers have expanded substantially in the United States since 2005 and now serve 11 U.S. gateways. These airlines operate large Airbus A340, A380, and Boeing 777 aircraft, which significantly increases the number of available international seats departing from the U.S. low-cost international carriers such as Norwegian Air Shuttle and WOW Air, which have also started expanding their presence in the United States.

---

<sup>12</sup> Research by the Regional Air Service Alliance, a coalition of smaller airports, airlines, and state aviation systems, suggests that airports need to have on average about 500 passengers per day each way (PDEW) in total to support at least one service on 51-76 seat regional jets. See for instance Swelbar, W. 2015. A Deeper Dive on the Timing of Events That Will Impact the Pilot Supply Issue. <http://airservicealliance.org/wp-content/uploads/2014/08/RASA-Deck-on-Pilot-Supply-0315.pdf>.

<sup>13</sup> For instance, American Airlines has built a significant Asian portfolio at Dallas/Ft. Worth International Airport, and Delta Air Lines has undergone growth in international destinations at Seattle Tacoma International Airport.

**Exhibit 3-9: Index of Domestic and International Seats from U.S. Airports, 2005-2014 (2005= 100)**



Source: Innovata SRS schedule data via Diio Mi.

**While Connectivity to Secondary Airports Has Fallen, U.S. Airports Remain Well-Connected to the Globe**

As part of the capacity reductions associated with the recession period from 2007-2009 in the United States, U.S. network legacy carriers such as Delta, Northwest, United, Continental, American, US Airways, and America West underwent a series of mergers. The resulting merged airlines were left with a number of hub airports, some of which overlapped in the regions of the country that they served. For instance, the combined United/Continental airline had hubs in both Chicago O’Hare International Airport and nearby Cleveland Hopkins International Airport. As a result, the combined carriers often de-hubbed their operations at secondary airports. The secondary airports that saw legacy carrier hubs close from 2005 to 2014 are shown in Exhibit 3-10.

### Exhibit 3-10: Secondary Airports De-hubbed by U.S. Legacy Carriers from 2005-2014

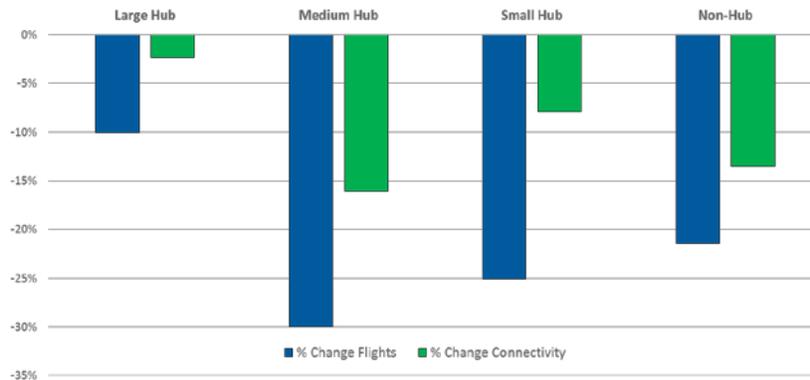


While these closures were individually negative for each of the airports that lost their hub status, the net effect on the U.S. air transportation system was less clear. For instance, many small airports had service to more than one hub for each legacy airline. That is, passengers traveling from Newport News, VA to Tulsa, OK on Delta in 2005 could connect either through Atlanta or Cincinnati. Once the Cincinnati service was cut, the connection to Tulsa was still available through another hub. Therefore, the number of one-stop destinations that could be reached from Newport News did not change as a result of Cincinnati's de-hubbing.

The Airport Connectivity Quality Index (ACQI), developed by researchers at the Massachusetts Institute of Technology, was designed to measure the quality and quantity of nonstop and one-stop connections available from airports in the United States. As shown in Exhibit 3-11, from 2007-2014, connectivity scores decreased at each of the FAA airport types.<sup>14</sup> However, connectivity declined by a smaller percentage than did overall domestic departures. This suggests that much of the reduction in departures as a result of the capacity restraint strategies practiced by carriers was a result of removing duplicative capacity from the system.

<sup>14</sup> An airport that enplaned 1% or greater of the U.S. total are given a Large Hub designation, airports that enplaned between 0.25% and 1% of the national total are given a Medium Hub designation; airports that enplaned between 0.05% and 0.25% of the national total are given a Small Hub designation; and airports that are enplaned less than 0.05% of the national total, but at least 10,000 passengers yearly, are given a Non-Hub designation. In 2013, there were 30 Large Hubs, 33 Medium Hubs, 71 Small Hubs, and 261 Non-Hubs in the United States.

**Exhibit 3-11: Percent Change in Departures and MIT Airport Connectivity Quality Index (ACQI) by FAA Airport Type, 2007-2014**



Source: Innovata SRS schedule data via Diio Mi, and MIT Airport Connectivity Quality Index.

**Looking Forward: How Might the U.S. Airline Industry Evolve in the Next Five Years?**

By the end of 2014, much of the contraction in the U.S. airline network was largely finished—a period of capacity restraint had settled in, along with restricted growth in domestic seats. Even Southwest Airlines—a low-cost carrier that had previously been a reliable source of growth, particularly from smaller airports—had joined the larger legacy carriers in restricting growth in seats and departures and discontinuing service between many small markets. Besides the ultra-low cost carriers (ULCCs) like Frontier Airlines, Spirit Airlines, and Allegiant Air, which make up less than two percent of the total domestic departures in the U.S., no airline was signaling for significant growth in the near future. Internationally, growth among foreign flag carriers remained strong, with both Gulf carriers and international low-cost carriers entering larger U.S. markets. U.S. carriers also focused their international growth around key hubs- Dallas/Fort Worth for American Airlines, Seattle for Delta Air Lines, and San Francisco for United Airlines.

Moving forward, despite a lower price of fuel, there does not appear to be justification to forecast a change in the status quo in the short term. U.S. airlines have publically signaled that the capacity restraint strategy, which has led in part to record profits for the airline industry, would continue into the near future, and investors are likely to be spooked if even moderate increases in capacity are forecast, as this would likely erode strong profits. Any domestic growth will likely be highly regionalized and focused on growing certain large markets with strategic value—Delta’s buildup

of capacity at Seattle Tacoma International Airport is a good example of this strategy.<sup>15</sup> Furthermore, smaller regional jets will likely continue to be removed from the system, and replacement of this service by larger regional jets in smaller markets will be dependent on economic fundamentals and the availability of enough pilots to operate this equipment.

Among the low-cost carriers—Southwest Airlines, JetBlue Airways, and Virgin America Airways—capacity growth is also likely to be focused primarily in large markets. These airlines are increasingly starting to behave similarly to the larger network carriers as investors hold them to the same standard. And while the ULCCs—Frontier Airlines, Spirit Airlines, and Allegiant Air—are likely to provide solid growth, these carriers represent only a small fraction of the domestic market and provide limited connectivity to the rest of the global air transportation system. Additionally, service entry by these carriers is often highly volatile and unstable; often, ULCCs announce their exit from new markets after just six months or less of service if the service does not prove to be profitable. Finally, international growth is likely to remain strong, but focused mainly at the largest of U.S. airports.

These trends in national and international air service in the United States serve as a critical backdrop to analyzing Virginia’s air service performance over the last decade. To this end, the next section explores trends in Virginia air service and compares the Commonwealth’s performance to the national trend. Then, individual airport-by-airport analyses are conducted to identify growth patterns in service, traffic, connectivity, and fleet mix at each of Virginia’s primary commercial service airports. The results of these analyses inform the benchmarking analyses and strategic recommendations of further chapters.

---

<sup>15</sup> Delta began a program of significant international and domestic capacity increases at Seattle Tacoma International Airport, calling the airport a new hub in its network, despite the presence of alliance partner Alaska Airlines.

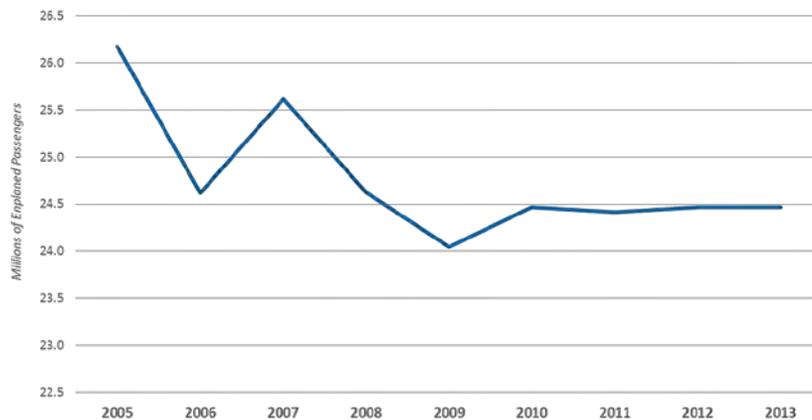
## 4. Statewide Air Service Trends in the Commonwealth of Virginia, 2005-2014

In this section, we review in greater detail the trends in air service at Virginia’s nine commercial service airports over the last decade. The performance of Virginia’s airports over this period must be assessed with national and international air service trends in mind; to this end, Virginia’s air service will be compared relative to these trends. This section will focus on air service in Virginia as a whole; in Section 5, the performance of individual airports is assessed in detail.

### **Passenger Traffic Did Not Recover As Quickly in Virginia as the National Average**

As shown in Exhibit 4-1, enplaned passengers at Virginia’s nine primary commercial service airports have declined from their peak in 2005. From 2005 to 2014, enplaned passengers at Virginia’s airports declined by 6.5 percent, compared to a national increase of 0.5 percent over the same time period.

### **Exhibit 4-1: Enplaned Passengers at Virginia’s Primary Commercial Service Airports**

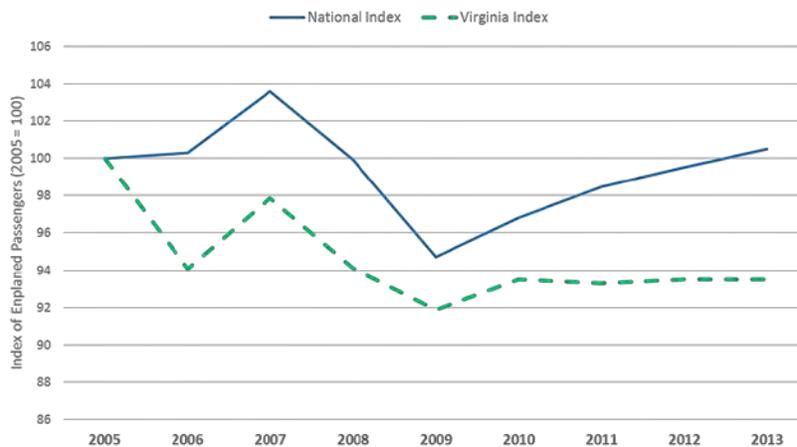


Source: FAA Air Carrier Activity Information System (ACAIS).

Note that between 2007 and 2009, Virginia’s airports saw a decline of nearly 1.5 million enplaned passengers, from just over 25.5 million passengers in 2007 to about 24 million passengers in 2009. This aligns with national trends, as airports throughout the country saw a reduction of air transportation demand (and a corresponding reduction in capacity) as a result of the Great Recession.

However, recall from Exhibit 3-1 that on the national level, passenger traffic actually increased from 2009 to 2014 as air transportation demand recovered following the recession. In Virginia, this trend did not take place. Although passenger traffic increased slightly from 2009 to 2010, traffic has remained essentially flat in the four years since then. Indeed, as shown in Exhibit 4-2, Virginia’s aviation system did not recover in the same fashion as did the national system in the five years following the Great Recession. Not only was the effect of the recession felt more strongly in Virginia—the recovery did not proceed at the same pace.

**Exhibit 4-2: National and Virginia Index of Enplaned Passengers, 2005-2014 (2005 = 100)**



Source: FAA Air Carrier Activity Information System (ACAIS).

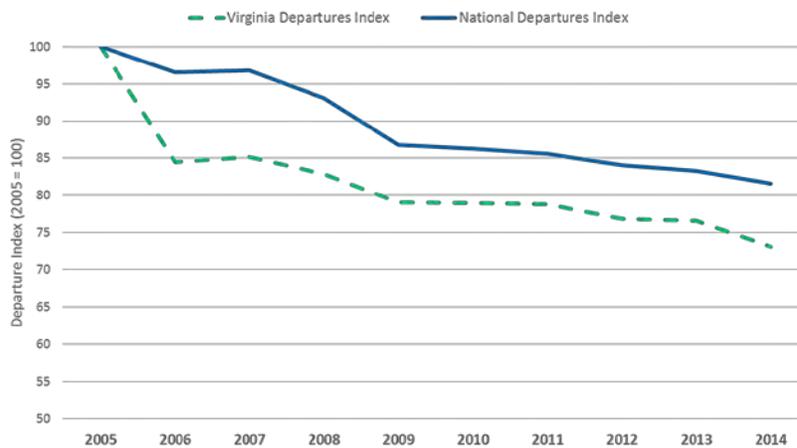
The flat recovery of Virginia’s passenger traffic relative to national trends can be examined from two angles: first, it suggests that there are potentially systemic characteristics of Virginia’s airports or Virginia’s economy that prevented passenger traffic from recovering as quickly as would have been expected. For instance, Virginia’s strong government and military sector meant that the Commonwealth was particularly vulnerable to federal budget cuts, sequestration, and a reduction in government and military spending. The corresponding reduction in government and military travel had a significant effect on passenger traffic in the Commonwealth, particularly in the Washington, DC, and Hampton Roads areas. However, the fact that passenger traffic has remained relatively constant over the last four years can also be seen as an opportunity—since passenger

traffic has not yet recovered to pre-recession levels, strategic actions could encourage a return to historic levels of demand.

**Virginia Also Lost More Seats and Departures than the National Average**

Since the Commonwealth of Virginia’s passenger traffic did not recover as quickly as the U.S. average, it is not surprising that scheduled departures and available seats also saw larger reductions than the nation as a whole. As shown in Exhibits 4-3 and 4-4, Virginia lost a greater percentage of its scheduled departures and available seats from 2005 to 2014 than all U.S. airports during that period. Virginia’s departures were reduced by 26.9 percent from 2005-2014 compared to an 18.4 percent reduction nationwide, and available seats in Virginia were cut by 17.2 percent as opposed to a 7.9 percent reduction nationwide during the same time period.

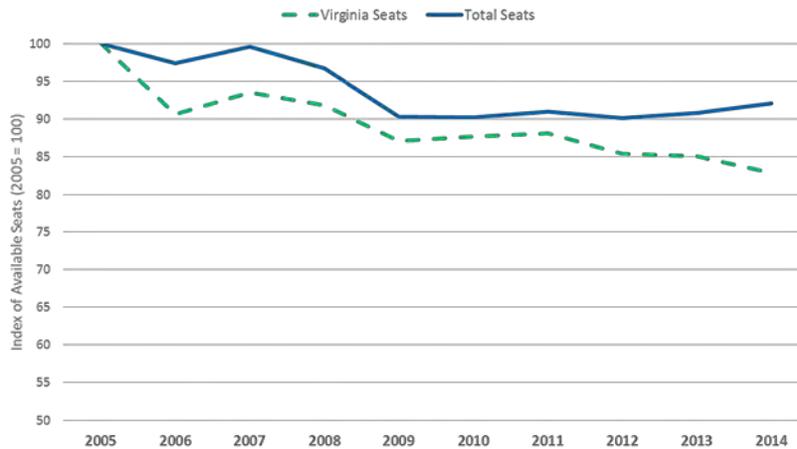
**Exhibit 4-3: National and Virginia Index of Scheduled Departures, 2005-2014 (2005 = 100)**



Source: Innovata SRS schedule data via Diio Mi.

Virginia’s reductions in departures and seats were due to many of the same economic and strategic factors that affected the U.S. air transportation system as a whole nationwide. However, certain factors made Virginia’s airports potentially more vulnerable than others as a result of the same set of larger industry and economic pressures. These factors are discussed on an airport-by-airport basis in Section 5 of this chapter.

**Exhibit 4-4: National and Virginia Index of Available Seats, 2005-2014 (2005 = 100)**



Source: Innovata SRS schedule data via Diio Mi.

**Virginia’s Airports Lost More Domestic Service, On Average,  
Than Other Airports in Their Peer Groups**

The Federal Aviation Administration assigns each primary commercial service airport in the United States a “hub type,” based on the number of enplaned passengers in the previous year as a fraction of the total enplaned passengers in the United States. The hub types present a good way to compare airports against peers within their size group. Exhibit 4-5 shows the hub type classification of each of Virginia’s primary commercial service airport in 2013, the latest year for which hub type destinations were available.<sup>16</sup>

<sup>16</sup> The Federal Aviation Administration defines four “hub types” based on the number of passengers enplaned in the previous year. The hub types are Large Hub, Medium Hub, Small Hub, and Non-Hub.

**Exhibit 4-5: Hub Types of Primary Commercial Service Airports in the Commonwealth of Virginia**

<b>Name</b>	<b>Code</b>	<b>Hub Type</b>
<b>Reagan National</b>	DCA	<b>Large Hub</b>
<b>Washington Dulles</b>	IAD	<b>Large Hub</b>
<b>Norfolk</b>	ORF	<b>Small Hub</b>
<b>Richmond</b>	RIC	<b>Small Hub</b>
<b>Charlottesville-</b>	CHO	<b>Non-Hub</b>
<b>Lynchburg</b>	LYH	<b>Non-Hub</b>
<b>Newport News</b>	PHF	<b>Non-Hub</b>
<b>Roanoke</b>	ROA	<b>Non-Hub</b>
<b>Shenandoah Valley</b>	<b>SHD</b>	<b>Non-Hub</b>

Source: FAA Air Carrier Activity Information System (ACAIS), 2013.

As Exhibit 4-6 shows, for each hub type, Virginia’s airports lost more domestic flights on average from 2005-2014 than the national average. Overall, Virginia saw a 29.7 percent reduction in domestic flights from 2005-2014, as compared to a 20.3 percent reduction nationwide. At Small Hub and Non-Hub airports, Virginia saw a 33.5 percent reduction in domestic flights compared to a 31.4 percent reduction nationwide.

However, the Large Hub reduction is affected by the bankruptcy of Independence Air in 2005. Independence was based at Washington Dulles International Airport, and served the airport with over 67,000 flights in 2005. As this airline went bankrupt due to high fuel prices and a solely-regional jet operation, the declines at Virginia’s Large Hub airports are greater than they otherwise would have been.

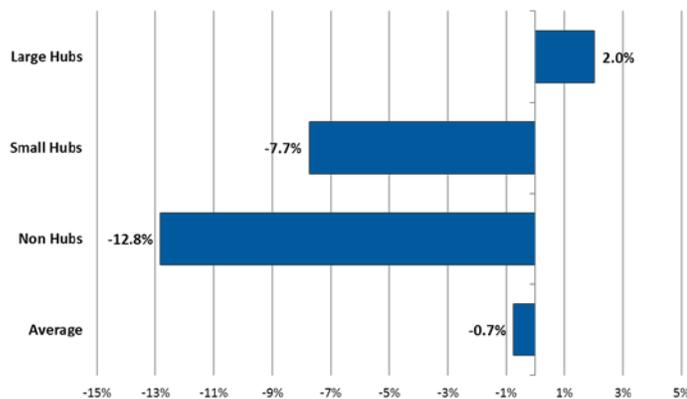
**Exhibit 4-6: Percent Change in Domestic Flights from 2005-2014, Nationwide Compared to the Commonwealth of Virginia**

Airport Type	% Change in Domestic Flights (2005-2014)	
	Nationwide	Commonwealth of VA
<b>Large Hub</b>	-10.8%	<b>-28.5%</b>
<b>Large Hub Excluding Independence</b>	-9.3%	<b>-10.6%</b>
<b>Medium Hub</b>	-33.4%	N/A
<b>Small Hub</b>	-28.4%	<b>-31.6%</b>
<b>Non-Hub</b>	-27.2%	<b>-37.2%</b>
<b>Medium Hub, Small Hub, and Non-</b>	<b>-31.4%</b>	<b>-33.5%</b>
<b>All Airports</b>	<b>-20.3%</b>	<b>-29.7%</b>

Source: Innovata SRS schedule data via Diio Mi.

Additionally, much like the national trend, passenger traffic growth in Virginia since the trough of the Great Recession has been mostly focused at Large Hub airports, as shown in Exhibit 4-7. From 2008 to the year ended 3Q 2014, O&D traffic at Virginia’s Large Hub airports increased by two percent, compared to a 7.7 percent decline at Small Hubs and a 12.8 percent decline at Non-Hubs. Overall, O&D traffic in the Commonwealth remains at essentially the same level it was in 2008.

**Exhibit 4-7: Percent Change in Virginia O&D Passenger Traffic, 2008-Year Ended 3Q 2014**



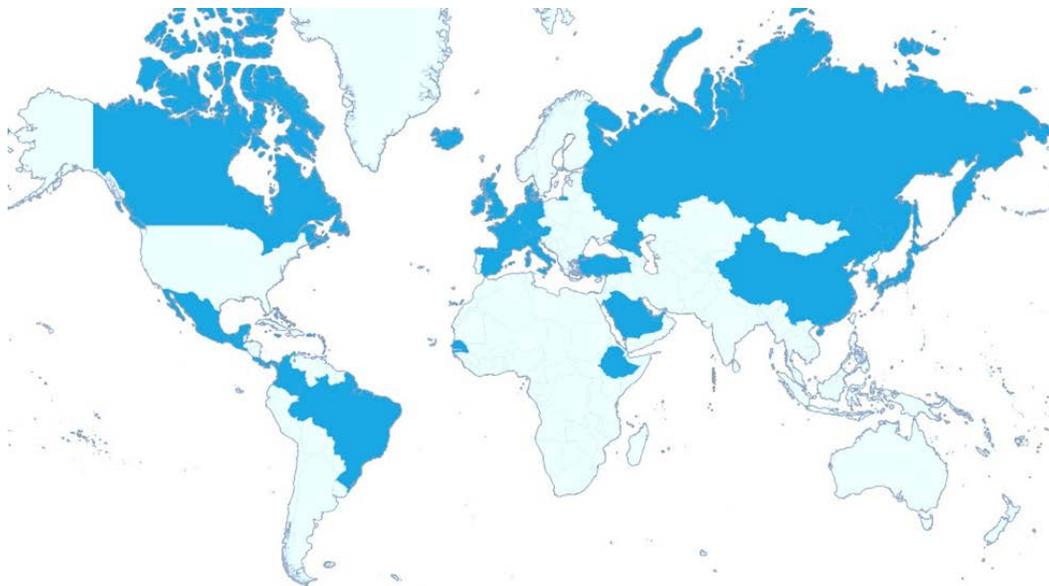
Source: U.S. DOT DB1B O&D Survey data via Diio Mi.

## **International Service Remains a Bright Spot for Virginia**

Despite the reduction in domestic departures and seats, international service in Virginia remains among the strongest in the country. International departures increased by 30.7 percent from 2005 to 2014, compared to an average national increase of 11.2 percent. Most of the increase in international service came from Washington Dulles International Airport, although Reagan National Airport also saw an increase in international service over the same time period and Richmond International Airport recently added seasonal service to Cancun.

In 2014, scheduled international service was available from the Commonwealth of Virginia to forty countries around the world. This wealth of international service provides a tremendous service to Virginia's residents by providing direct connections to the global air transportation networks and the global economy. A map of the countries served from the Commonwealth of Virginia by scheduled nonstop service is shown in Exhibit 4-8, and represents a great strength of Virginia's air transportation portfolio.

### **Exhibit 4-8: Countries Served by Scheduled Nonstop Service from the Commonwealth of Virginia in 2014**



Source: Innovata SRS schedule data via Diio Mi.

Virginia’s airports, and specifically Washington Dulles International Airport, remain among the nation’s premier international gateways for both domestic and foreign flag carriers. Direct, non-stop service is offered to most of mainland Europe, as well as to Latin America, Africa, and Asia. After New York and Los Angeles, Washington Dulles is often the next U.S. airport to be chosen by foreign-flag carriers for commencement of service, particularly by the 26 foreign-flagged members of the Star Alliance, of which United Airlines is also a member. Washington Dulles is also one of only three U.S. airports to have received service from all three Gulf carriers—Emirates, Etihad Airways, and Qatar Airways—as well as Turkish Airlines.

The presence of many of the world’s fastest growing airlines at Washington Dulles International Airport highlights the strength of international travel demand in the region. As international carriers continue to grow at faster rates than domestic legacy carriers, Washington Dulles and the Commonwealth of Virginia should both continue to see an enhancement in both the level of service and wealth of international destinations available in the Commonwealth.

**Virginia Remains Heavily Reliant on Regional Jets**

With the current pressures on the regional pilot labor market, as well as the continued retirement of smaller 37-50 seat regional jets, the proportion of departures operated by regional jet equipment, such as the types shown in Exhibit 4-9, remains a critical component in assessing the vulnerability of an air transportation system to future cuts in service. For each of the years from 2005 to 2014, the proportion of departures operated by regional jet equipment at the Commonwealth of Virginia was computed.

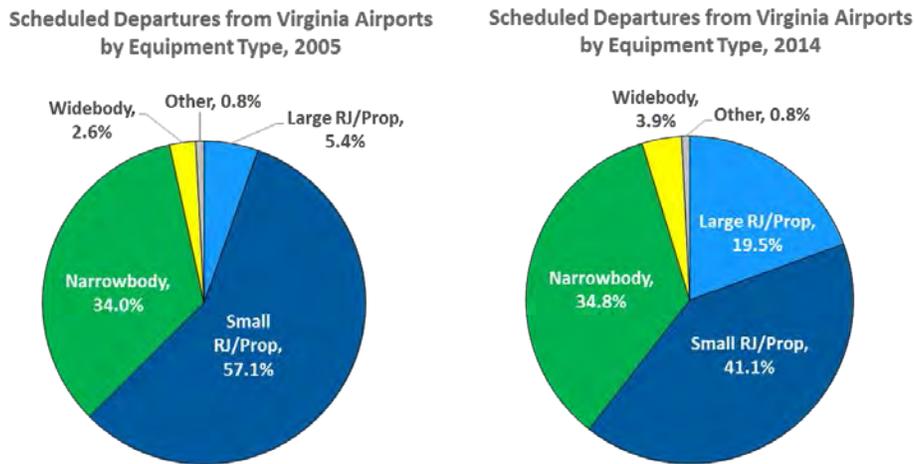
**Exhibit 4-9: Aircraft Types and Typical Number of Seats**

<b>Aircraft Type</b>	<b>Example</b>	<b>Typical Number of Seats</b>
<b>Small Regional Jet/Prop</b>	Embraer ERJ-145	<b>30-50</b>
<b>Large Regional Jet/Prop</b>	Canadair CRJ-700	<b>51-100</b>
<b>Narrowbody</b>	Boeing 737	<b>100-210</b>
<b>Widebody</b>	Airbus A340	<b>250+</b>
<b>Other</b>	<b>Beechcraft</b>	<b>9-19</b>

As shown in Exhibit 4-10, the Commonwealth of Virginia still relies predominately on regional jet equipment to operate its departures. Note, however, that this reliance has slightly decreased over time; in 2005, 62.5 percent of scheduled departures from Virginia’s airports were operated by regional jet equipment; by 2014, this proportion had decreased to 60.6 percent. Additionally, while 34 percent of available seats from Virginia airports in 2005 were on narrowbody aircraft,

by 2014 this proportion had increased to 34.8 percent. Note that this decrease in regional jet reliance is not due to growth in narrowbody departures—instead, the departures operated by regional jet aircraft and other equipment types have declined at a faster rate than have narrowbody departures in the Commonwealth.

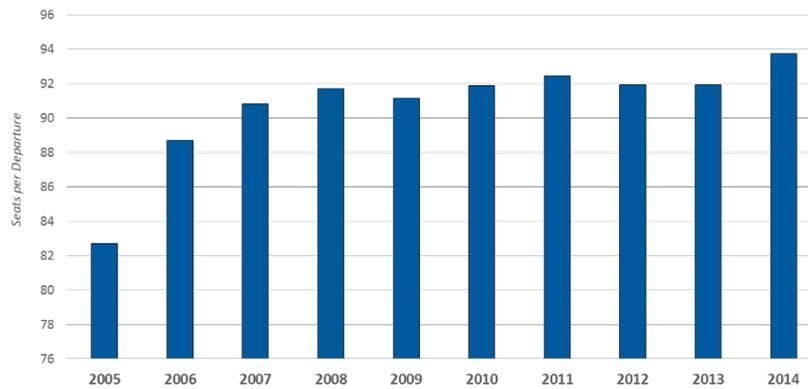
**Exhibit 4-10: Scheduled Departures at Virginia Airports by Aircraft Equipment Type, 2005 and 2014**



Source: Innovata SRS schedule data via Diio Mi.

Note that Virginia, like many airports throughout the country, has seen an increasing reliance on 51-76 seat regional jet aircraft. These aircraft made up just 5.4 percent of departures in 2005, but in 2014 represented 19.5 percent of departures from airports in the Commonwealth. 51-76 seat regional jets have come into favor in many markets, as the economics of operating these aircraft are favorable on a seat-mile basis compared to smaller regional jets. As a result, Virginia’s airports are seeing a general trend in up-gauging that agrees with national averages. Seats per departure increased from about 82.7 in 2005 to 93.8 in 2014, as shown in Exhibit 4-11.

### Exhibit 4-11: Seats per Departure at Virginia Airports, 2005-2014



Source: Innovata SRS schedule data via Diio Mi.

The increase in seats per departure from Virginia’s airports suggests that the trend of up-gauging, which is also occurring nationally, is in full force in domestic markets in Virginia. Seats per departure also likely increased due to the influx of international service, which is often operated using large, widebody equipment. For instance, both British Airways and Air France operate Airbus A380 aircraft on their daily flights to Washington Dulles International Airport.

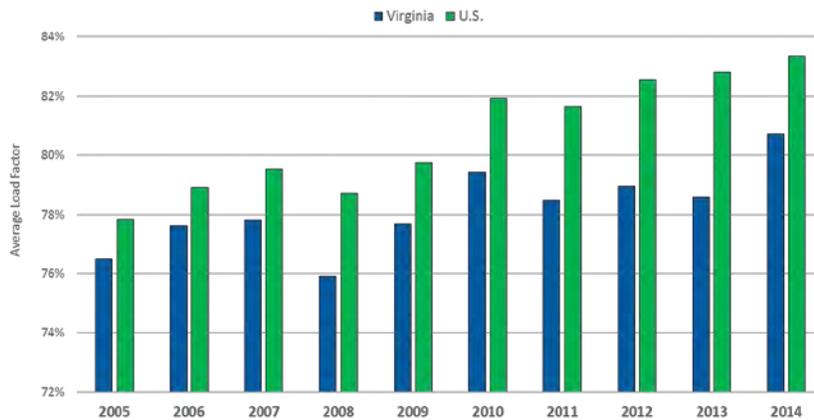
The Airbus A380 is the largest commercial aircraft currently in operation, with a capacity that exceeds 500 passengers, depending on the seating configuration. Deployment of the A380 has been limited to only a small number of high-demand, strategically important global routes. As of April 2015, Washington Dulles is one of only eight U.S. airports<sup>17</sup> with at least one A380 departure, and Washington Dulles ranked fourth in the nation in terms of the number of A380 departures per month. The fact that Washington Dulles can support multiple A380 operations highlights that the Washington-London and Washington-Paris routes rank amongst the highest-density and strongest origin-destinations markets in the world. Further A380 operations could continue to be possible as carriers continue to up-gauge and consolidate capacity onto these largest aircraft.

As a result of increasing seats per departure combined with fewer departures and increased demand, Virginia airport average load factors have increased from about 76.5 percent in 2005 to about 80.7 percent in 2014. However, as shown in Exhibit 4-12, these load factors have not

<sup>17</sup> The other U.S. airports with A380 departures were located in Atlanta, Dallas/Fort Worth, Houston, Los Angeles, Miami, New York-JFK, and San Francisco.

increased as quickly as the U.S. industry average, since passenger demand in Virginia has not recovered to the same degree as the U.S. industry as a whole, as demonstrated earlier in Exhibit 4-2. While available seats have been reduced in both Virginia and the nation as a whole, the slower recovery of Virginia’s passenger demand prevented load factors from reaching national averages.

**Exhibit 4-12: Average Load Factors at Virginia Airports vs. the U.S. Average, 2005-2014**



Source: U.S. DOT T-100 data via Diio Mi.

**For Both International and Domestic Journeys, Virginians Often Connect Outside of the Commonwealth**

As more carriers move to a hub-and-spoke network system, more and more journeys will involve a connecting itinerary. Within Virginia, two Large Hub airports—Washington Dulles International Airport, and Reagan National Airport—both offer the possibility of connecting itineraries. Washington Dulles is a hub for United Airlines and offers connecting service throughout the country and internationally, and Reagan National Airport operates as a small-jet airline hub for US Airways and the new American Airlines.<sup>18</sup>

However, despite the presence of these two Large Hub airports within the Commonwealth, most connecting itineraries to or from Virginia’s Small Hub and Non-Hub airports do not pass through Washington Dulles or Reagan National. In fact, as shown in Exhibit 4-13, for domestic connecting journeys from Virginia’s Small Hub and Non-Hub airports, just 7.3 percent of passengers connected through Washington Dulles or Reagan National in 2005. By 2014, this number had

<sup>18</sup> As of this writing, US Airways and American Airlines were operating under separate operating certificates.

increased slightly to 7.6 percent. Instead, Atlanta and Charlotte are the two most popular connecting hubs for domestic passengers; together, these hubs control over 56 percent of the domestic connecting traffic from Virginia’s seven Small Hub and Non-Hub airports.

**Exhibit 4-13: Share of Connecting Passenger Traffic by Connecting Hub for Domestic Journeys from Virginia’s Small Hub and Non-Hub Airports**

City	Code	2005	2010	2014*
<b>Atlanta</b>	ATL	26.4%	29.1%	<b>28.8%</b>
<b>Charlotte</b>	CLT	17.2%	22.7%	<b>27.5%</b>
<b>Philadelphia</b>	PHL	6.6%	6.4%	<b>6.6%</b>
<b>Chicago O’Hare</b>	ORD	7.3%	7.2%	<b>6.4%</b>
<b>Washington</b>	IAD	6.3%	6.7%	<b>6.0%</b>
<b>Dallas/Fort Worth</b>	DFW	4.8%	5.0%	<b>5.2%</b>
<b>Detroit</b>	DTW	5.4%	4.6%	<b>3.7%</b>
<b>Baltimore</b>	BWI	5.3%	3.5%	<b>3.5%</b>
<b>Newark</b>	EWR	1.3%	1.8%	<b>2.0%</b>
<b>Reagan National</b>	DCA	1.0%	1.1%	<b>1.6%</b>
<b>Other</b>		<b>18.3%</b>	<b>11.8%</b>	<b>8.7%</b>

\*Year Ended 3Q 2014.

Source: US DB1B O&D survey data via Diio Mi.

As shown in Exhibit 4-14, due to Washington Dulles’s strong selection of international flights, the airport captures a greater percentage of international traffic connecting to and from Virginia’s Small Hub and Non-Hub airports than domestic connecting traffic. However, Atlanta and Charlotte still rank as the top two connecting airports for international itineraries. Charlotte’s share of Virginia’s connecting international traffic has increased significantly over the last ten years, from 5.9 percent in 2005 to 14.3 percent in 2014. This increase occurred in parallel with a sharp rise in both domestic and international services available out of Charlotte over those years.<sup>19</sup> Washington Dulles, on the other hand, has seen its share of Virginia’s international connecting traffic fall over the last ten years, due in part to a reduction of domestic feeder service from Virginia’s other airports.

<sup>19</sup> Only San Francisco, CA gained more domestic and international flights than Charlotte in the period between 2007 and 2014.

**Exhibit 4-14: Share of Connecting Passenger Traffic by Connecting Hub for International Journeys from Virginia’s Small Hub and Non-Hub Airports**

City	Code	2005	2010	2014*
<b>Atlanta</b>	ATL	18.5%	19.4%	<b>21.2%</b>
<b>Charlotte</b>	CLT	5.9%	13.3%	<b>14.3%</b>
<b>Washington Dulles</b>	IAD	14.8%	17.1%	<b>12.6%</b>
<b>Philadelphia</b>	PHL	12.6%	10.1%	<b>9.8%</b>
<b>Newark</b>	EWR	9.0%	8.6%	<b>8.8%</b>
<b>New York JFK</b>	JFK	3.1%	7.5%	<b>7.8%</b>
<b>Chicago O’Hare</b>	ORD	10.5%	6.8%	<b>7.2%</b>
<b>Miami</b>	MIA	2.3%	5.1%	<b>4.9%</b>
<b>Detroit</b>	DTW	8.7%	4.9%	<b>4.4%</b>
<b>Reagan National</b>	DCA	0.2%	0.1%	<b>0.4%</b>
<b>Other</b>		<b>18.3%</b>	<b>11.8%</b>	<b>8.7%</b>

\*Year Ended 3Q 2014.

Source: US DB1B O&D survey data via Diio Mi.

It should be mentioned, however, that the reduction in Virginia passenger traffic connecting at either Washington Dulles or Reagan National could be a result of passengers driving from other Virginia communities directly to these airports, as opposed to taking a domestic connecting flight first. As direct international service options from Washington Dulles have increased in recent years, this possibility of “drive diversion” may have also increased. This type of behavior is difficult to measure from ticket data alone, but could be a significant explanatory factor of the reduction in connecting traffic through these two Virginia hubs.

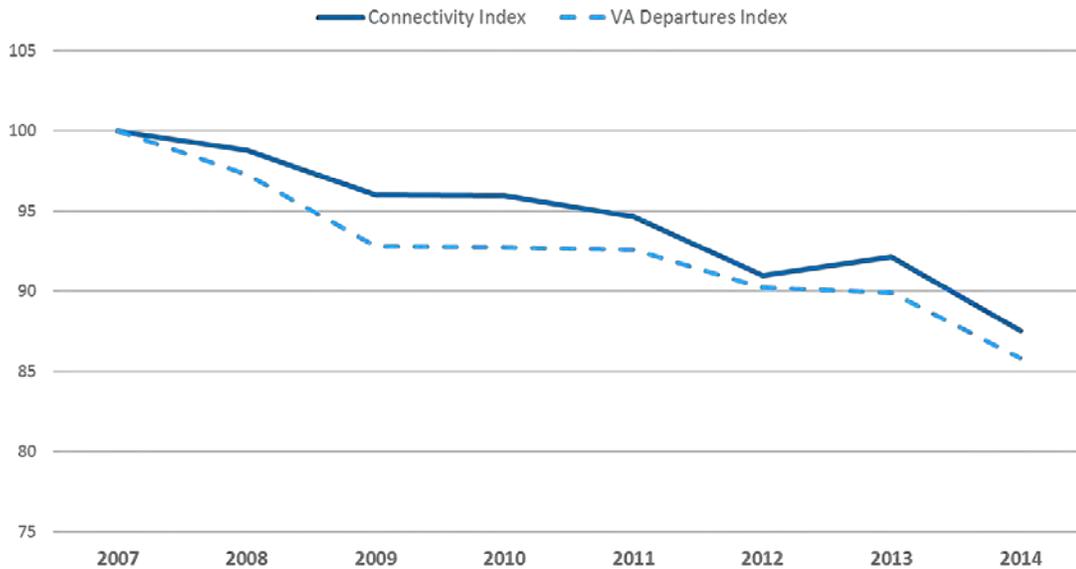
**Global Connectivity at Virginia’s Airports Has Not Declined as Quickly as Capacity, Although Upside Potential Still Remains**

Like most airports in the United States, the flight reductions at Virginia’s airports adversely affected those airports’ connectivity to the global air transportation network. However, since much of these service reductions were in secondary cities that were already served by connecting service through another hub, the overall impact on connectivity in the Commonwealth of Virginia was not as drastic as the decrease in flight departures would suggest.

As discussed in Section 2, the MIT Airport Connectivity Quality Index (ACQI) is a peer-reviewed metric that can be used to assess the level of connectivity of an airport to other airports in the global air transportation system, based on the frequency and quality of each individual connection. As shown in Exhibit 4-15, the sum of ACQI scores for Virginia’s nine commercial service airports

decreased by 12.5 percent from 2007-2014.<sup>20</sup> This is compared to a 14.2 percent reduction in scheduled departures at Virginia airports over the same time period.

**Exhibit 4-15: Indices of Connectivity and Scheduled Departures for Virginia Airports, 2007- 2014 (2007 = 100)**



Source: Innovata SRS schedule data via Diio Mi and MIT Airport Connectivity Quality Index.

Note: Connectivity index computed by summing individual ACQI scores for all of Virginia’s primary commercial service airports for each year.

While connectivity has not declined as quickly as capacity for Virginia’s airports, the gap between the two is relatively small compared to national averages. For instance, as shown in Exhibit 3-11 in Section 3, connectivity decreased just 2.3 percent nationwide at Large Hub airports from 2007-2014, compared with a 10 percent reduction in flights, and connectivity declined by 16 percent at Medium Hub airports on top of a 30 percent decline in departures. Additional attention should therefore be focused on how to increase not only available service at Virginia’s airports, but also how to ensure that service is best positioned to provide additional connectivity to the global air transportation system.

<sup>20</sup> 2007 was the first year for which ACQI data was available.

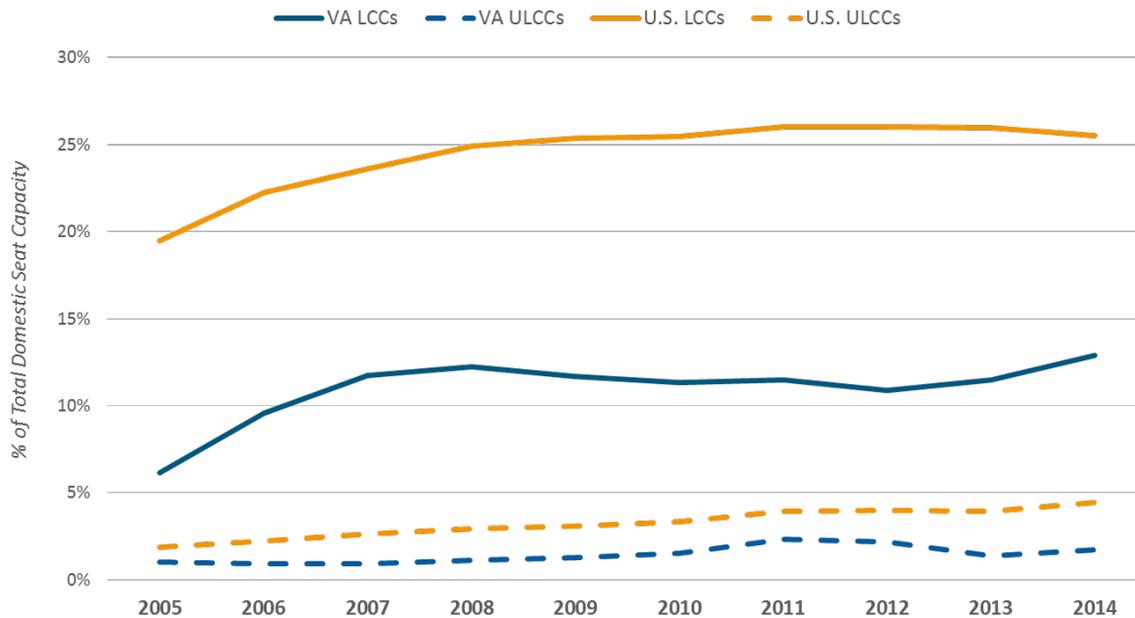
## **Conclusions: Virginia's Challenges Were Similar to Those Faced by the Nation, but its Opportunities are Bright**

As this section has described, the Commonwealth of Virginia's airports have faced many of the same challenges as airports nationwide regarding the availability of domestic air transportation service. Like other airports with a reliance on smaller, regional jet equipment, Virginia's airports saw significant reductions in flight capacity, seat capacity, and passenger traffic in the ten years from 2005-2014. While recovery from these cuts has been relatively flat in Virginia, a stronger regional and national economy presents many opportunities to build up service to replace the flights and seats that have been cut over the last decade. Through a targeted, strategic air service development effort, the Commonwealth could target a return to pre-recession passenger levels to match the national trend.

The Commonwealth of Virginia also has several significant air transportation strengths, including a strong network of international flights that is among the strongest in the country, as well as international growth that has exceeded the national average. Non-stop or one-stop service is available from Virginia's airports to many domestic destinations as well. Each of Virginia's airports is served by at least one network carrier or its regional affiliates, and Virginia's residents are well-served by the connectivity that these airlines provide.

Virginia also has significant presence of both low-cost carriers (LCCs) and some ultra-low-cost carriers (ULCCs), yet the percentage of seats made up of LCC and ULCC service is low relative to U.S. averages, as shown in Exhibit 4-16. Growing these services, as well as promoting new services by these carriers and ULCCs like Frontier Airlines, Spirit Airlines, and Allegiant Air, will be important to ensure that Virginians have access to affordable, frequent air transportation.

**Exhibit 4-16: LCCs and ULCCs as a Percentage of Total Domestic Seat Capacity, 2005-2014**



Source: U.S. DOT T-100 data via Diio Mi.

Note: LCCs include Southwest, JetBlue, and AirTran; ULCCs include Frontier, Allegiant, and Spirit.

While a statewide analysis can reveal overall trends in air transportation system performance, a more detailed look at each of Virginia’s efforts is necessary to fully understand the trends that affect air service throughout the Commonwealth. In the next section, each of Virginia’s primary commercial service airports is examined in detail for trends in carrier mix, seats, passengers, fleet mix, markets served, and recent service. Taken together, these airport profiles in combination with the analysis from across the Commonwealth, form the foundation of the benchmarking analysis completed in Chapter 2, as well as the recommendations developed later in this document.

## 5. An Analysis of Service Trends at Individual Virginia Airports

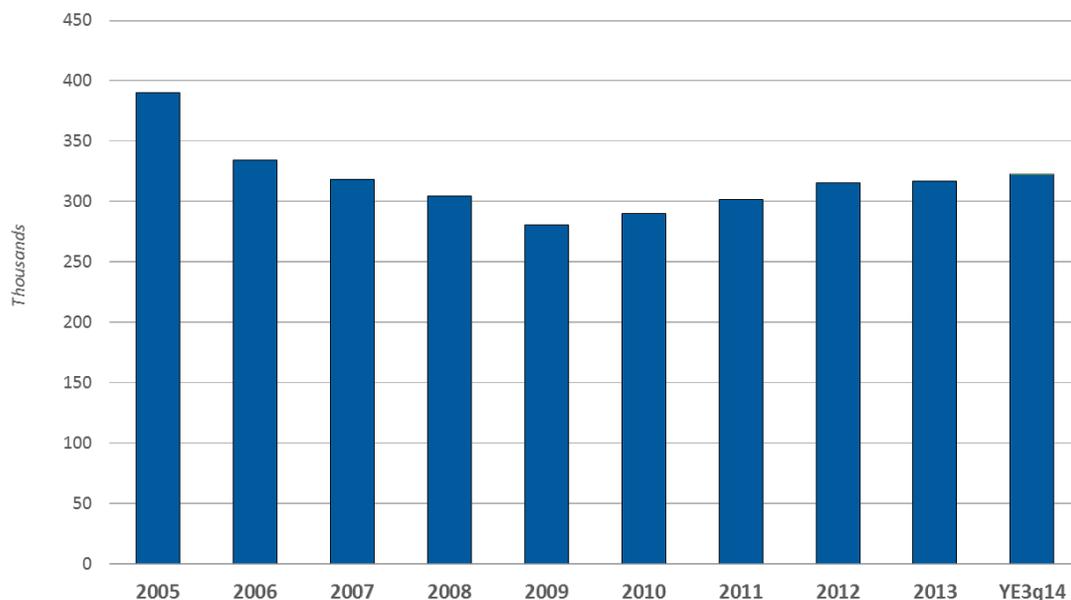
In this section, trends in service and passenger traffic are examined in detail for each of Virginia’s primary commercial service airports. Particular attention is paid to current available service, recent trends between 2014 and projected 2015 schedules, as well as these airports’ performance over the last decade.

In this section, airports are discussed in alphabetical order by three-letter IATA airport code.

### 5.1 Charlottesville-Albemarle Airport (CHO)

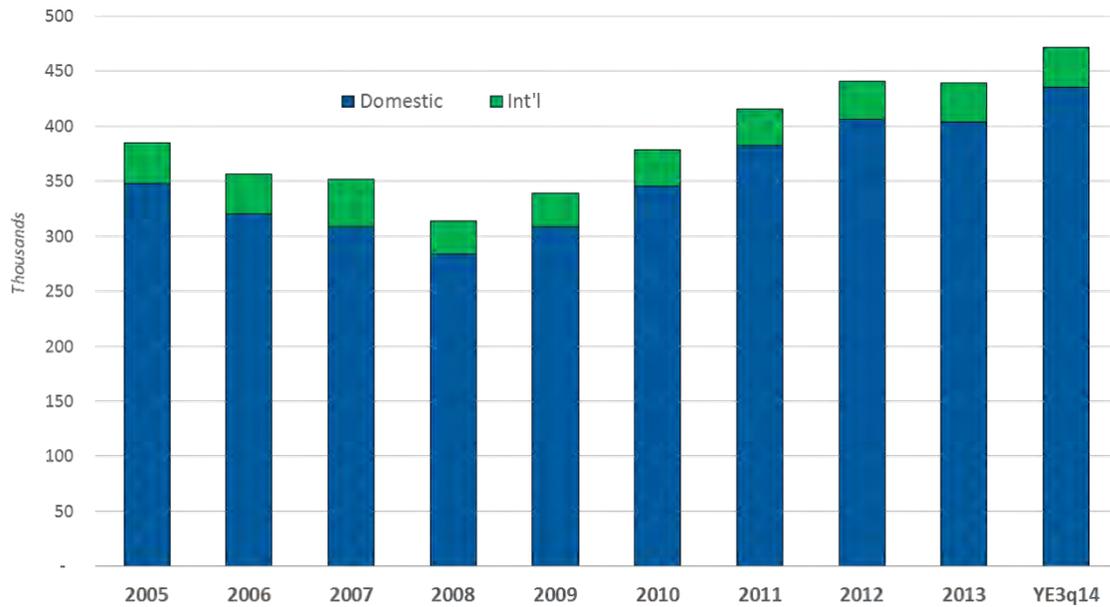
Charlottesville-Albemarle Airport, located in Charlottesville, VA, is a Non-Hub airport that enplaned 230,699 passengers in 2013, according to FAA data. Charlottesville was one of several Virginia airports that saw growth in both origin and destination (O&D) passenger traffic and total departing seats over the last six years, as shown in Exhibits 5-1 and 5-2. O&D passenger traffic at Charlottesville has increased by 15 percent since 2009, while O&D traffic (both directions) surpassed 450,000 passengers for the first time in 2014.

**Exhibit 5-1: Total Departing Seats at Charlottesville, 2005- Year Ended 3Q 2014**



Source: Innovata SRS data via Diio Mi.

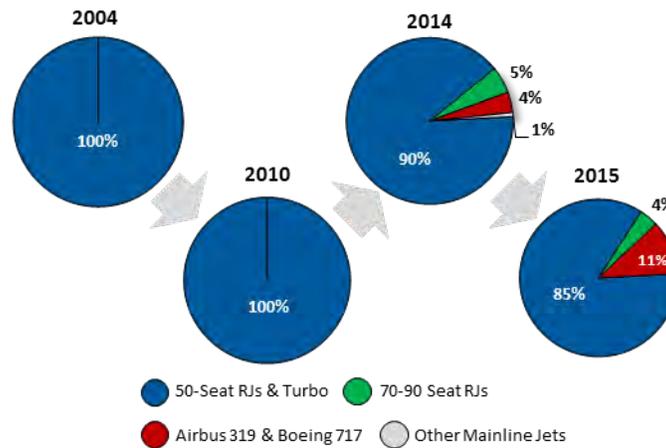
**Exhibit 5-2: Historical Origin-Destination Traffic to/from Charlottesville, 2005 – Year Ended 3Q 2014**



Source: US DOT DB1B data via Diio Mi.

Charlottesville is served by three major legacy carriers: Delta, United, and American/US Airways. Charlottesville’s growth has come from additional service to New York LaGuardia from Delta Air Lines, as well as up-gauging of several services. For instance, Delta Air Lines has introduced its newly-acquired Boeing 717 aircraft on its service from Charlottesville to Atlanta. The up-gauging trend at Charlottesville can be seen in Exhibit 5-3.

**Exhibit 5-3: Percent Change in Domestic Capacity at Charlottesville by Aircraft Type, 2004- 2015**



Source: Innovata SRS schedule data via Diio Mi.

While up-gauging can lead to a loss of departures (and indeed, March 2015’s schedules show one less daily departure on average than March 2014 in Charlottesville), the up-gauging trend is a good sign for Charlottesville. As smaller regional jets continue to be removed from markets in favor of larger regional jets and narrowbody aircraft, airports that show that they can support large regional jet service will be well-positioned for the future. Charlottesville-Albemarle Airport appears to be such an airport.

## 5.2 Ronald Reagan Washington National Airport (DCA)

Ronald Reagan Washington National Airport (DCA) is a Large Hub airport in Arlington, VA. Along with Washington Dulles International Airport and Baltimore/Washington Thurgood Marshall International Airport, Reagan National is one of three airports serving the Washington, D.C. multi-airport region.

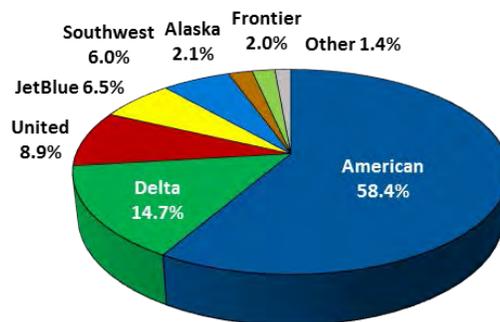
Reagan National has several unique characteristics that limit the types of flights that can be operated out of the airport. First, the airport is slot-controlled, meaning that airlines need permission to operate a flight at a particular time. Slot controls put restrictions on the number of flights that can be operated from an airport, due to concerns about delays resulting from operational constraints. As a result, Reagan National may not be able to see growth in seats to match demand at the airport.

Second, the airport is one of few in the country that operate under a perimeter-rule, which limits the distance that a flight can fly nonstop out of Reagan National without special approval. In Reagan National’s case, flights are limited to a 1,250-mile distance from the airport, which effectively limits traffic to the West Coast of the United States.<sup>21</sup>

Both of Reagan National’s special features have come into public attention recently—the airport was a primary focus in the 2013 merger case between American Airlines and US Airways, in which the Department of Justice filed a motion to block the merger between the two larger carriers. As a result of the merger settlement, the combined carrier had to divest, or sell, 52 slot pairs from Reagan National Airport.<sup>22</sup> These slots were purchased by low-cost carriers, including JetBlue Airways, Southwest Airlines, and Virgin America Airlines. As a result, the combined American/US Airways ended service to 17 small- and medium-sized cities that were previously served by regional jets out of Reagan National.<sup>23</sup>

Reagan National has a good mix of network, LCC, and ULCC airlines, as shown in Exhibit 5-4. As of August 2014, the combined American/US Airways still controlled a majority of enplanements, although this is likely to shift towards the LCCs once the new flights with the traded slots have been operated for a significant amount of time.

**Exhibit 5-4: Share of Total Enplanements by Carrier at Reagan National, Year Ended August 2014**



Source: US DOT T-100 data via Diio Mi.

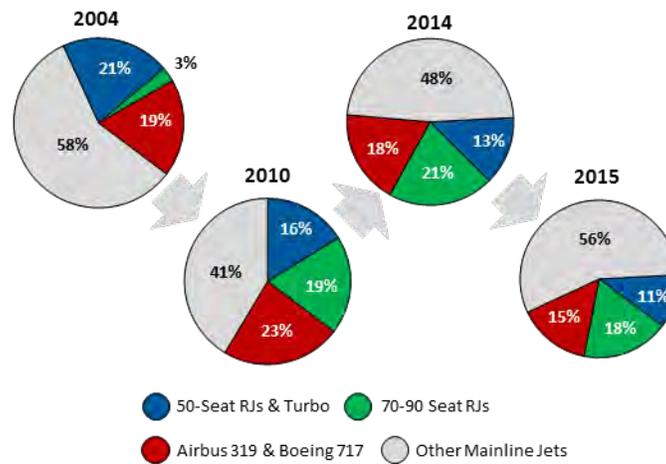
<sup>21</sup> Some flights, such as Alaska Airlines’ service to Seattle, have been exempted from the perimeter rule.

<sup>22</sup> Maxon, T. 2014. “American Airlines, US Airways to end nonstop service to 17 cities out of Washington Reagan.” Dallas Morning News 15 January 2014.

<sup>23</sup> Ibid. The cities served by new LCC service were mostly large markets, some of which already had existing service.

Along with the removal of some regional jet flights as a result of the merger settlement, Reagan National has also been the site of significant up-gauging over recent years. 70-90 seat regional jets, which made up just 0.3 percent of total domestic flights by network carriers in 2004, now reflect 38.9 percent of such service in 2015; an increase from 31.4 percent just one year earlier.

**Exhibit 5-5: Percent Change in Domestic Capacity at Reagan National by Type, 2004-2015**



Source: Innovata SRS schedule data via Diio Mi.

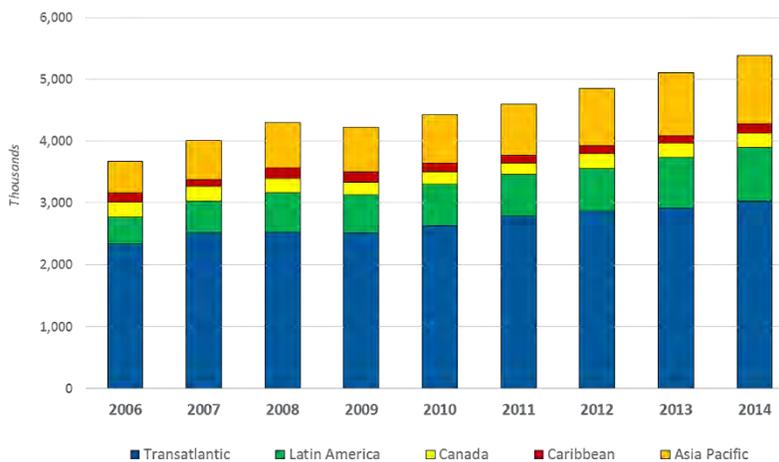
Growth at Reagan Washington National Airport will continue to be restricted by slot constraints and the perimeter rule, even as the airport continues to get national attention. The full effects of the slot transaction between the combined American Airlines/US Airways has also not likely been fully reflected in the marketplace. Yet despite these restrictions, Reagan Washington National Airport saw a 10.7 percent increase in seats from March 2014 to March 2015 and remains a key airport for both the Commonwealth of Virginia and the Washington metropolitan area. T

### 5.3 Washington Dulles International Airport (IAD)

Washington Dulles International Airport (IAD) is a Large Hub airport serving the greater Washington metropolitan area, along with Reagan National Airport and Baltimore/Washington Thurgood Marshall International Airport. Washington Dulles is served by a mix of domestic and international carriers, primarily by United Airlines, which maintains a hub at Washington Dulles, as well as United’s foreign flag partners in the Star Alliance.<sup>24</sup> Each of Virginia’s airports, with the exception of Lynchburg and Newport News, had nonstop service to Washington Dulles in 2014.

Despite some recent growth in international service at Reagan National Airport, Washington Dulles remains Virginia’s flagship international gateway, and among one of the most important international hubs in the country and the world. In March 2015, Washington Dulles International Airport ranked tenth in the country in terms of international destinations served with direct service. International passenger traffic has continued to grow over the last decade, as shown in Exhibit 5-6. Asia Pacific and Latin American destinations have shown particular strength at Washington Dulles.

**Exhibit 5-6: International O&D Traffic by Region at Washington Dulles, 2006-2014**

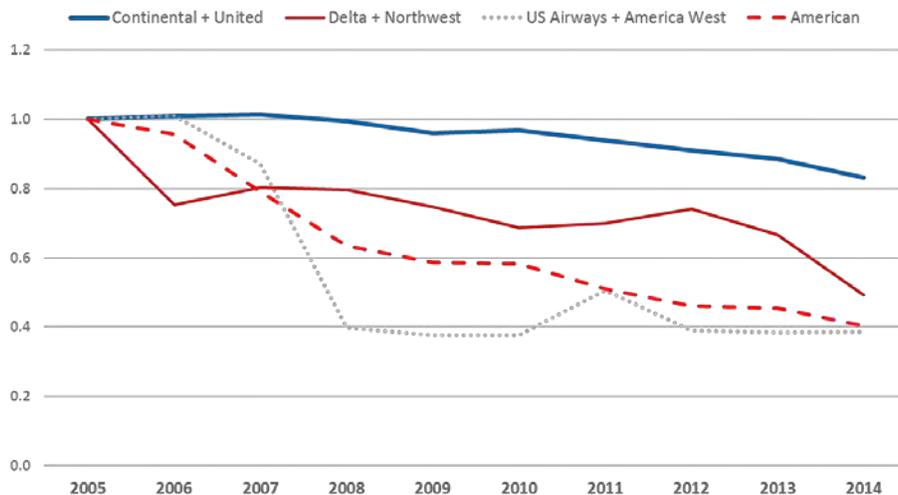


Source: ARC adjusted IATA BSP data via Diio Mi.

<sup>24</sup> As of April 2015, the members of the STAR Alliance included Adria Airlines, Aegean Airlines, Air Canada, Air China, Air India, Air New Zealand, ANA All Nippon Airlines, Asiana Airlines, Austrian Airlines, Avianca, Brussels Airlines, Copa Airlines, Croatia Airlines, Egyptair, Ethiopian Airlines, EVA Air, LOT Polish Airlines, Lufthansa, SAS Scandinavian Airlines, Shenzhen Airlines, Singapore Airlines, South African Airways, Swiss International Airlines, TAP Portugal, Thai Airways, Turkish Airlines, and United Airlines.

Buoyed by this strong international growth, Washington Dulles’ challenge will be to start reversing some of the losses in domestic service that the airport has seen over the last decade. Several of the large legacy carriers—American, US Airways, and Delta—were among the first to reduce service out of United’s hub at Washington Dulles. Then, following its merger with Continental Airlines and its acquisition of another hub in the northeastern United States at Newark Liberty International Airport (EWR), United itself started to decrease service from its hub in another round of schedule rationalization, as shown in Exhibit 5-7. These decreases in service occurred in parallel with a cutback in military and governmental travel as a result of federal budget cuts and sequestration from 2011 through 2013. This particularly affected airports in the Washington, DC, area, such as Washington Dulles and Reagan National, as well as airports in the Hampton Roads region, which is also highly dependent on military and government spending.

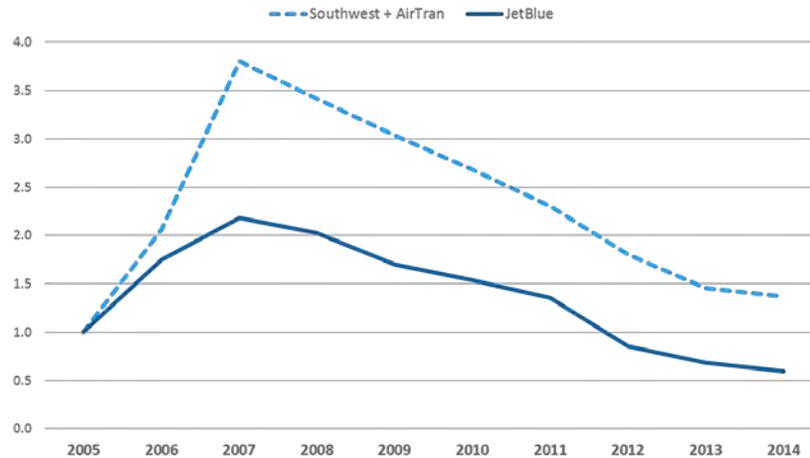
**Exhibit 5-7: Index of Available Seats by Legacy Carriers at Washington Dulles, 2005-2014 (2005 = 1.0)**



Source: Innovata SRS schedule data via Diio Mi.

While Washington Dulles was the scene of significant low-cost carrier growth in the latter half of the 2000s, this growth has tapered of late. As JetBlue Airways and Southwest Airlines began increasing their presence at nearby Reagan National, these low-cost carriers started to remove operations from Washington Dulles in recent years, as shown in Exhibit 5-8. However, Washington Dulles has seen some ULCC growth; Frontier Airlines recently started serving the airport, and the domestic reductions in capacity from United Airlines over the last five years have increased the opportunities for service expansion from point-to-point ULCCs like Frontier.

**Exhibit 5-8: Index of Scheduled Departures by Low-Cost Carriers at Washington Dulles, 2005-2014 (2005 = 1.0)**



Source: Innovata SRS schedule data via Diio Mi

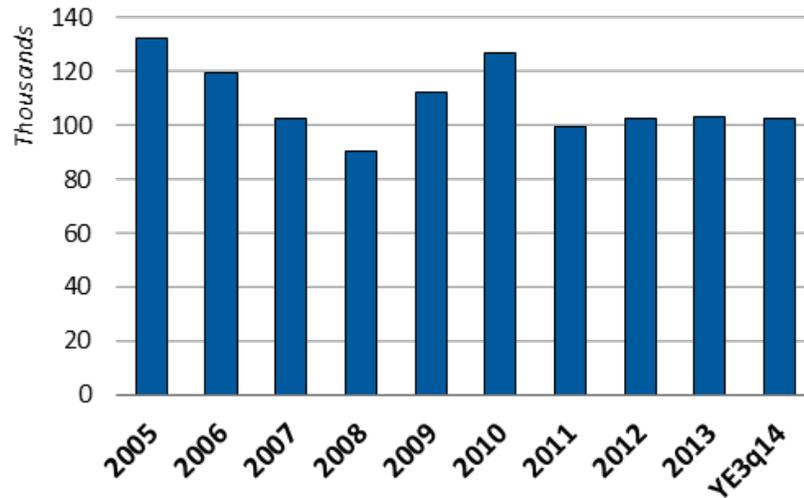
Washington Dulles' role in the Commonwealth of Virginia's air transportation system is certainly unique, and its service patterns and future strategies for growth warrant an exploration in detail.

## 5.4 Lynchburg Regional Airport (LYH)

Lynchburg Regional Airport (LYH) is an airport serving the city of Lynchburg, VA. It is one of Virginia's Non-Hub airports with a single carrier—US Airways Express—offering service to a single destination—Charlotte, NC. Passenger traffic at Lynchburg has been relatively steady over the last few years according to data from the FAA, holding at between 70,000 and 80,000 enplaned passengers per year.

During this period, service levels have also remained relatively steady, as shown in Exhibit 5-9. US Airways offers between three and six daily departures from Lynchburg to Charlotte, depending on the day of week, on a mix of small regional jet and turboprop equipment. Through its Charlotte hub, US Airways offers connections to a variety of domestic and international destinations—the top destinations from Lynchburg in 2014 were Miami and Orlando, and Charlotte itself ranked 13<sup>th</sup> in terms of O&D traffic from Lynchburg in that year.

**Exhibit 5-9: Total Departing Seats at Lynchburg, 2005-Year Ended 3Q 2014**



Source: Innovata SRS schedule data via Diio Mi.

As a Non-Hub airport with service offered exclusively by small regional jets and turboprops, Lynchburg’s largest concern over the next five years will be whether the local market can support potential up-gauging to larger regional jet aircraft as smaller equipment continues to be taken out of service. Recent research from the Regional Air Service Alliance has suggested that Non-Hub airports that are able to support 76-seat jet service enplane an average of about 500 passengers per day each way (PDEW).<sup>25</sup> In the year ended 3Q 2014, the most recent time period for which data was available, Lynchburg enplaned about 200 PDEWs.

This is not to say that Lynchburg could not support service by 76-seat jets; in the same study, the Regional Air Service Alliance found that markets with as few as 79 PDEW had service from at least one 76-seat jet.<sup>26</sup> However, Lynchburg’s smaller size means that unique strategies will be necessary to support service. Chapter 3 is dedicated specifically to Virginia’s Small Hub and Non-Hub airports and how these airports can thrive in a period of enhanced up-gauging and potentially more limited regional jet service.

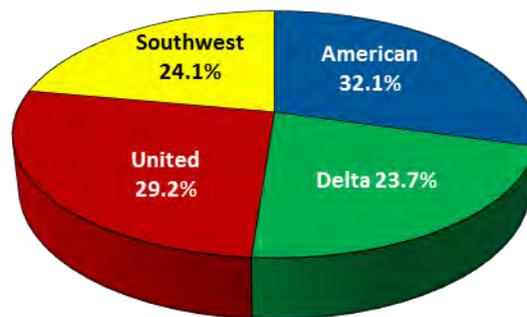
<sup>25</sup> Swelbar, W and Regional Air Service Alliance. 2015. “A Deeper Dive on the Timing of Events that will Impact the Pilot Supply Issue” at 18. <http://airservicealliance.org/wp-content/uploads/2014/08/RASA-Deck-on-Pilot-Supply-0315.pdf>.

<sup>26</sup> Ibid.

## 5.5 Norfolk International Airport (ORF)

Norfolk International Airport (ORF) is a Small Hub airport serving Norfolk, VA and the Hampton Roads region. It was Virginia's fourth-largest airport by daily departures, available seats, and passengers enplaned in 2014. In March 2015, four carriers served 16 destinations from Norfolk—including both Washington Reagan National Airport and Washington Dulles International Airport—using a mix of regional jet, turboprop, and narrowbody equipment.

**Exhibit 5-10: Total Enplanements by Carrier at Norfolk, Year Ended August 2014**



Source: US DOT T-100 data via Diio Mi.

Like other airports in Virginia and the Hampton Roads region, a decrease in government and military spending and travel as a result of federal sequestration had an adverse impact on the airport. Overall, passenger traffic, available seats, and departures have fallen at Norfolk in the last five years. Southwest Airlines, after its merger with AirTran Airways, announced that service to Atlanta, Jacksonville, Florida, and Nashville would be suspended from Norfolk in 2014. Southwest has also cut service to Las Vegas and Tampa from Norfolk. However, the airport has not been without its successes—American Airlines and US Airways announced service from New York LaGuardia out to Norfolk in 2014 to compete more directly with Delta's service to LaGuardia.

Despite having service to both Reagan National and Washington Dulles, many Norfolk passengers connect at airports in other states to reach their domestic and international destinations. As shown in Exhibit 5-11, 6.4 percent of Norfolk's connecting passengers on domestic itineraries connected through Washington Dulles in the year ended 3Q14, compared to 27.8 percent at Atlanta and 18.4 percent at Charlotte. Reagan National captured 4.2 percent of the connecting domestic traffic from Norfolk. Internationally, Washington Dulles captured 15.7 percent of Norfolk passengers

but ranked second to Atlanta with 18 percent; Reagan National captured just one percent of connecting international passengers.

**Exhibit 5-11: Share of Connecting Passenger Traffic by Connecting Hub for Domestic Journeys from ORF**

City	Code	2005	2010	2014*
<b>Atlanta</b>	ATL	23.0%	19.8%	<b>27.8%</b>
<b>Charlotte</b>	CLT	11.9%	16.9%	<b>18.4%</b>
<b>Baltimore</b>	BWI	10.9%	9.2%	<b>9.2%</b>
<b>Washington Dulles</b>	IAD	6.5%	7.2%	<b>6.4%</b>
<b>Philadelphia</b>	PHL	5.4%	5.2%	<b>5.9%</b>
<b>Dallas/Fort Worth</b>	DFW	6.2%	6.3%	<b>5.7%</b>
<b>Chicago Midway</b>	MDW	1.0%	3.7%	<b>5.0%</b>
<b>Detroit</b>	DTW	6.3%	5.0%	<b>4.2%</b>
<b>Reagan National</b>	DCA	2.2%	3.0%	<b>4.2%</b>
<b>Chicago O’Hare</b>	ORD	5.7%	6.1%	<b>3.7%</b>
<b>Other</b>		<b>20.9%</b>	<b>17.6%</b>	<b>9.4%</b>

\*Year Ended 3Q 2014

Source: US DB1B O&D survey data via Diiio Mi.

Norfolk also has several domestic O&D markets with traffic levels that might be sufficient to attract nonstop service. These markets serve as likely targets for Norfolk to enhance the portfolio of service from the airport, and could attract additional low-cost competition. However, like any small airport in the country, the low-growth capacity discipline mindset of legacy and low-cost carriers alike would need to be overcome to successfully attract new service.

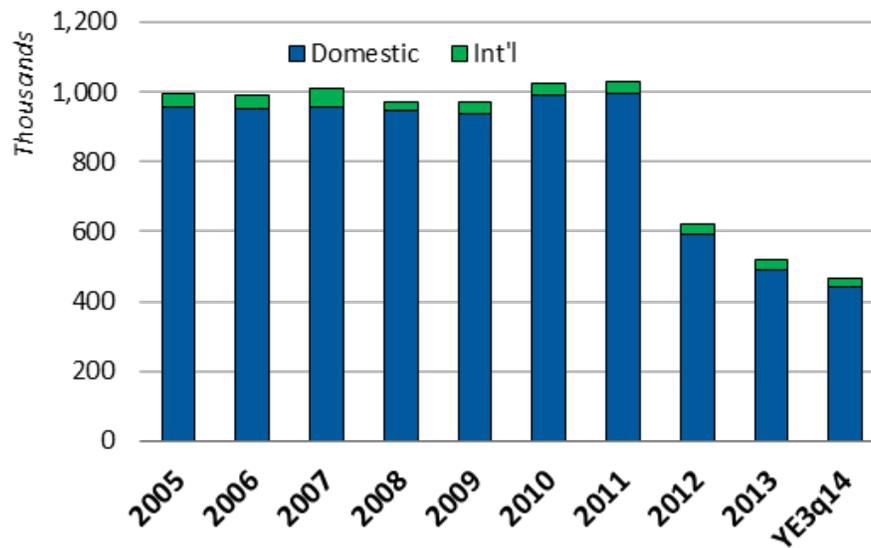
**5.6 Newport News Williamsburg International Airport (PHF)**

Newport News Williamsburg International Airport (PHF) is a Non-Hub airport serving Newport News, VA, as well as the greater Hampton Roads region. It forms a multi-airport region along with Norfolk International Airport, discussed in Section 5.5 above. Newport News and Norfolk are located less than 30 miles apart. In addition, Richmond is 70 miles to the west via I-64.

Like many airports in multi-airport regions in the U.S., Newport News has seen reductions in service as flights and capacity have been consolidated at the larger airport within the region. For instance, since Southwest Airlines served Norfolk International Airport and AirTran Airways

served Newport News, the region would have been served by both carriers after the two airlines merged. As a result, AirTran exited service at Newport News shortly after AirTran was acquired by Southwest. This resulted in a significant drop in both origin-destination traffic and available seats between 2011 and 2012.

**Exhibit 5-12: Origin-Destination Traffic at Newport News, 2005-Year Ended 3Q 2014**



Source: US DB1B data via Diio Mi.

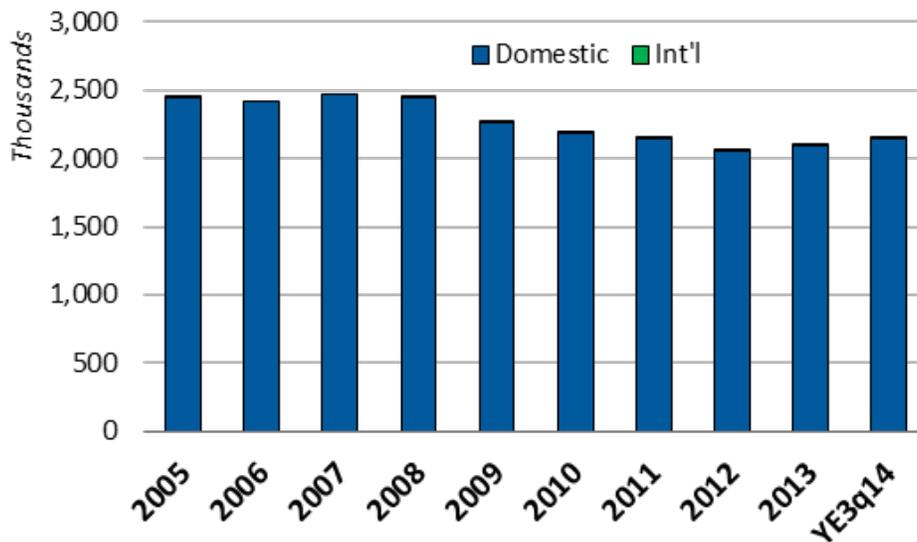
Newport News has attracted a variety of ULCCs to commence service from the airport. Frontier Airlines, Allegiant Air, and PEOPLExpress all served the airport at some point in 2014. However, as of 2015, none of this ULCC service remained. Frontier Airlines and Allegiant Air both exited the Newport News market in 2014, and PEOPLExpress halted service after mechanical issues grounded the aircraft used.

Newport News has taken a creative approach to winning new service to bolster traffic and passenger activity at the airport. Since the market has shown that it can support up-gauging—20.8 percent of its service is now operated using 76-seat aircraft or larger—its reliance on small regional jets to operate nearly 80 percent of its departures means that a further increase in seats per departure could occur in the coming years. Like other smaller airports in multi-airport regions, Newport News will need to continue its creativity to attract new carriers, perhaps through the use of incentive packages or revenue guarantees.

## 5.7 Richmond International Airport (RIC)

Richmond International Airport (RIC) is a Small Hub airport that serves Virginia’s capital of Richmond. It was the third-largest airport in the Commonwealth by passenger traffic, departures, and available seats in 2014. Richmond has service from all of the major network carriers—American (along with US Airways), Delta, and United—as well as the two largest low-cost carriers: Southwest and JetBlue. Richmond previously had international service to Toronto on Air Canada Jazz; this service was ended in 2013. Richmond has seen a recent increase in service to vacation destinations, including seasonal international service to Cancun operated by Interjet and Allegiant Air service from Richmond to St. Petersburg, Florida that started in February 2015.

**Exhibit 5-13: Total Departing Seats at Richmond, 2005 – Year Ended 3Q 2014**

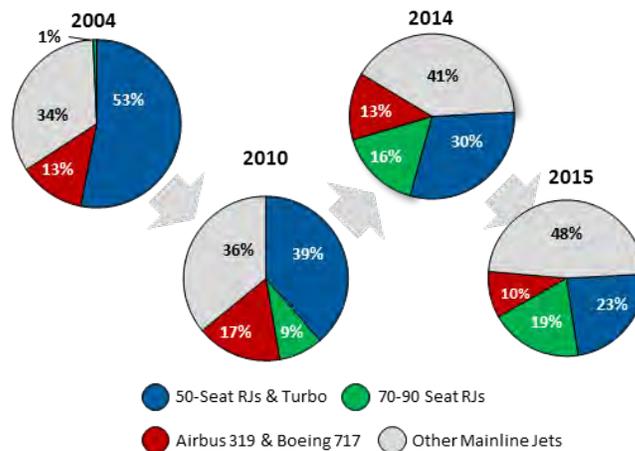


Source: Innovata SRS schedule data via Diio Mi.

As shown in Exhibit 5-13, Richmond shows a classic example of service cuts during the period from 2007-2009 as carriers closed secondary hubs and rationalized schedules. Since then, growth in seats has been relatively flat as a result of capacity discipline. However, the last few years have seen some increases in seats. This is due in part to significant up-gauging at the airport. In 2010, 69.2 percent of Richmond’s legacy carrier departures were operated using small regional jet and turboprop aircraft; by 2015, the majority of those departures were operated using aircraft 76-seats and larger.

Although Richmond no longer has direct international service, international traffic has increased significantly at a cumulative annual growth rate of about five percent per year, according to ARC adjusted IATA BSP data. While transatlantic passengers make up the largest share of Richmond’s international market, Caribbean and Latin American traffic have also increased by as much as forty percent since 2009. These international passengers mostly connect through Atlanta (33.8 percent in YE 3Q 2014), Charlotte (19.9 percent) and Chicago-O’Hare (10.3 percent); Washington Dulles, on the other hand, captured 3.7 percent of international connecting traffic from Richmond. It is possible, however, that travelers in the Richmond area decide to drive directly to Washington Dulles to begin their journeys instead of taking the short flight to the airport from Richmond; this could potentially explain the lower share of Washington international passenger travel from Richmond. Delays and issues with service reliability could also encourage passengers to drive directly to Washington Dulles as opposed to taking a connecting flight from Richmond.

**Exhibit 5-14: Percent Change in Domestic Capacity at Richmond by Aircraft Type, 2004-2015**



Source: Innovata SRS schedule data via Diio Mi.

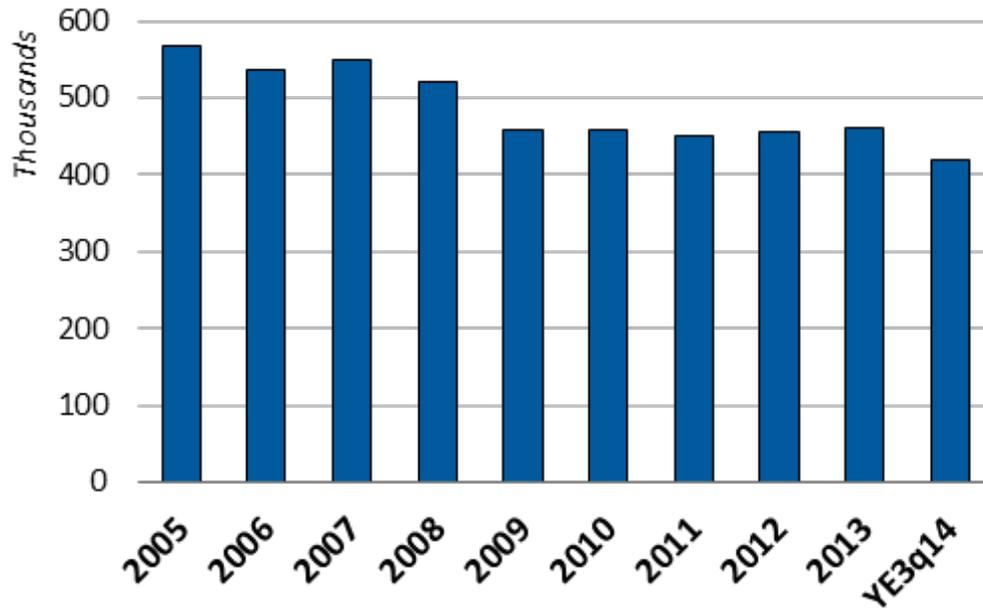
Richmond remains a good example of an airport that is beginning to see a recovery after being affected by national trends of schedule rationalization and capacity discipline. Exhibit 5-14 demonstrates that the Richmond market is likely able to support service on larger aircraft types, so potential up-gauging of smaller regional jets may affect departure numbers at Richmond, but might not lead to loss in service to the extent that could be seen at smaller airports. While domestic passengers and growth have been stable of late, Richmond's challenge will be increasing that traffic in today's capacity-constrained industry environment.

## **5.8 Roanoke-Blacksburg Regional Airport (ROA)**

Roanoke-Blacksburg Regional Airport (ROA) is a Non-Hub airport in Roanoke, VA that serves the cities and towns in southwestern Virginia. The airport is now the largest Non-Hub airport in the Commonwealth of Virginia by passenger traffic, departures, and available seats. US Airways is the dominant airline at Roanoke, but the airport is also served by United, Delta, and American, with additional service from Allegiant Air serving St. Petersburg, FL and Orlando.

Much like Richmond, Roanoke has seen roughly flat levels of available seats and O&D traffic ever since the capacity discipline era took hold in 2010. These levels of service are lower than those pre-recession; for instance, Delta operated service from Roanoke to Cincinnati until 2008, at which point that service was cut as Cincinnati was de-hubbed. In recent years, Roanoke has seen slight declines in service from Delta to New York-LaGuardia (American and US Airways reinstated LaGuardia service in 2014), as well as some reductions in service by US Airways to Philadelphia.

**Exhibit 5-15: Total Departing Seats from Roanoke, 2005 – Year Ended 3Q 2014**



Source: Innovata SRS schedule data via Diio Mi.

As Charlotte is the most frequently-served destination out of Roanoke, it is not surprising that Charlotte is the most frequent hub of choice for Roanoke passengers connecting to other domestic destinations. Charlotte captured 46.3 percent of domestic connecting passengers from Roanoke in the year ended 3Q 2014, and Atlanta captured 27.7 percent. Washington Dulles connected 5.3 percent of domestic passengers from Roanoke, compared to nine percent in 2005.

**Exhibit 5-16: Share of Connecting Passenger Traffic by Connecting Hub for Domestic Journeys from Roanoke**

City	Code	2005	2010	2014*
Charlotte	CLT	30.4%	37.4%	<b>46.3%</b>
Atlanta	ATL	20.0%	23.6%	<b>27.7%</b>
Chicago O’Hare	ORD	10.0%	11.0%	<b>9.4%</b>
Detroit	DTW	11.0%	10.7%	<b>6.0%</b>
Washington Dulles	IAD	9.8%	9.0%	<b>5.3%</b>
Philadelphia	PHL	5.7%	7.0%	<b>5.0%</b>
New York LaGuardia	LGA	1.1%	1.3%	<b>0.3%</b>
Cincinnati	<b>CVG</b>	<b>12.0%</b>	<b>0%</b>	<b>0%</b>

Source: US DB1B O&D survey data via Diio Mi.

\*Year Ended 3Q 2014.

Although Delta has started up-gauging some of its Atlanta departures to narrowbody equipment out of Roanoke, 84.8 percent of departures on legacy carriers are still on 37-50 seat regional jet and turboprop equipment. While larger markets like Atlanta and Charlotte may support this type of equipment, some of Roanoke’s smaller markets by passengers traveled—such as Washington Dulles and Philadelphia—may not be feasible on larger regional jets. Like many smaller airports, up-gauging will be of increasing interest to Roanoke over the next few years. Chapter 3 discusses in detail the impacts of up-gauging on Virginia’s Small Hub and Non-Hub airports and suggests strategies for airports to cope with possible losses in frequencies or destinations.

## **5.9 Shenandoah Valley Regional Airport (SHD)**

Shenandoah Valley Regional Airport (SHD) is a Non-Hub airport located in Weyers Cave, VA. It is Virginia’s smallest primary commercial service airport in terms of passenger traffic and capacity. The airport became a primary commercial service airport for the first time in 2010, after it enplaned more than 10,000 passengers in that year.

Shenandoah Valley is also the only Virginia airport that is supported by the Essential Air Service (EAS) program. EAS is a government subsidy program that provides funding to airlines in exchange for operating scheduled air service from geographically-remote communities to nearby Large or Medium Hub airports. An airport must be at least 70 miles from the nearest Large or Medium Hub airport to qualify for EAS service; Shenandoah Valley is located 134 miles

away from the nearest Large Hub (Washington Dulles) according to a 2014 document from the Department of Transportation.<sup>27</sup>

Typically, EAS funding is provided in exchange for operating between two and four daily departures from the small airport to the nearest Large or Medium Hub.<sup>28</sup> This service is usually operated with equipment as small as nine seats and as large as 50 seats. As of November 2014, no EAS market was served with equipment larger than 50 seats.<sup>29</sup>

EAS flights are currently operated at Shenandoah Valley by Silver Airways, a regional airline that operates Saab turboprop aircraft with 34 seats. As of Nov. 1, 2014, Silver Airways was paid a yearly subsidy of \$1,980,922 to operate three daily departures from Shenandoah Valley to Washington Dulles under the United Express brand name.<sup>30</sup> This amount does not replace passenger revenue—passengers still need to pay normal airfares on flights operated with EAS subsidies.

The EAS Airport provides some level of stability to air service at Shenandoah Valley Regional Airport, since the number of departures per day and the equipment type on which those departures are operated are stipulated in the EAS contract. However, this does not mean that there have been no changes in air service at Shenandoah Valley over the last 10 years. For instance, EAS service to Shenandoah Valley had previously operated as a tag flight with Raleigh County Memorial Airport in Beckley, WV (BKW), but this additional tag was eliminated in 2013.

Additionally, EAS service was previously operated by regional affiliates of US Airways, serving both Washington Dulles and (in 2005) Pittsburgh. Now, only the single destination of Washington Dulles is offered. Finally, Shenandoah Valley has seen some low-cost carrier activity in recent years. Frontier Airlines began seasonal service from Shenandoah Valley to Orlando in late 2012; however, this service was terminated in April 2013 after less than a year of service. The pattern of O&D traffic at Shenandoah Valley Regional Airport highlights these increases and decreases in service over time.

---

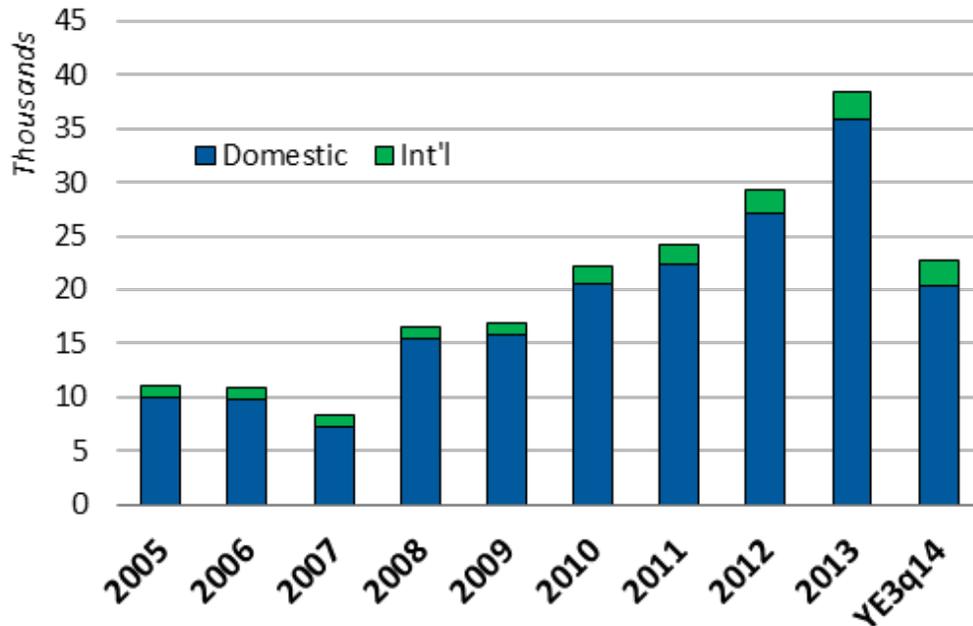
<sup>27</sup> <http://www.dot.gov/sites/dot.gov/files/docs/EAS%20community-distances%20to%20nearest%20hubs-Apr%202014.pdf>.

<sup>28</sup> U.S. Department of Transportation. 2015. Essential Air Service. <http://www.dot.gov/policy/aviation-policy/small-community-rural-air-service/essential-air-service>

<sup>29</sup> U.S. Department of Transportation. 2014. Subsidized EAS report for non-Alaska communities, November 2014.

<sup>30</sup> Ibid.

**Exhibit 5-17: Origin-Destination Traffic at SHD, 2005 – Year Ended 3Q 2014**



Source: US DOT DB1B data via Diio Mi.

As an EAS airport, Shenandoah Valley is likely to continue to receive subsidized service to Washington Dulles. Unless the U.S. Department of Transportation makes changes to the Essential Air Service program, this service is guaranteed to be provided, and an alternative carrier will be found if Silver Airways wishes to exit the market. For airports the size of Shenandoah Valley Regional Airport, these links provide crucial connections to the rest of the air transportation system, and allow passengers to connect to the rest of the United States and the world through Washington Dulles.

## 6. Future Trends in Commercial Air Service in the Commonwealth of Virginia

As the airport profiles in the previous section demonstrate, Virginia's airports have weathered the capacity discipline and schedule rationalization era in different ways. Some airports have thrived despite the nationwide reductions in capacity, while others have joined their peers in seeing cuts in service and passenger traffic as air carriers reduced their schedules. In this way, understanding the national trends in service presented in Section 3 of this chapter is crucial to evaluating the performance of each of Virginia's airports during the last decade.

While Virginia's airports remained resilient in the face of capacity reductions, future airline strategies will undoubtedly shape the Virginia air transportation landscape over the next five years:

- The capacity growth strategy of United Airlines will be critically important for the Commonwealth to monitor. As the major tenant of one of Virginia's Large Hub airports—Washington Dulles—United's domestic capacity growth strategies at Washington Dulles relative to their other hubs (including to Lynchburg and Newport News—the two Virginia airports without current nonstop service to Washington Dulles), and even the relationships between United and its Star Alliance partners, will affect the types of service that will be available to Virginia's residents and visitors.
- Many of Virginia's airports currently rely significantly on American Airlines service. The airline has a significant presence at its focus airport of Ronald Reagan Washington National Airport, and despite recent slot divestitures remains a key player in the Washington aviation market. Also, American Airlines' hub of Charlotte was the most-popular or second most-popular connecting point for passengers at six of Virginia's seven Small Hub and Non-Hub airports.
- In coming years, US Airways' network is likely to see changes as a result of its merger with American Airlines. Much as the other network carriers rationalized the size of their networks through their mergers and acquisitions, so too might the combined American/US Airways make selective cuts in flights, especially where services overlap. These impacts will likely be felt in stages over the next five years.

- Overall, the industry is likely to continue to maintain domestic capacity discipline to appease investors and lock in profitability. U.S. carriers continue to signal publicly that capacity growth will remain limited, despite lower fuel prices. Jeff Smisek, CEO of United Airlines, said in a March 2015 investor briefing that the airline “will only grow...as demand dictates,” and that capacity discipline would continue to limit growth in frequencies or seats in many markets.<sup>31</sup> However, U.S. airline profitability will likely result in a redoubled effort on passenger experience improvements, with new developments in technology and passenger comfort likely. While these improvements may not directly affect passenger numbers in the Commonwealth of Virginia, they are a sign that the domestic industry is in a period of relative economic health.
- International growth will likely accelerate or continue at current levels, and the impacts of foreign-flag low-cost carriers will be important to monitor as well. While international growth will likely be a strong point nationwide, keeping this traffic connecting within the Virginia instead of out-of-state could be a strategic goal for the Commonwealth. The extent to which passengers from Virginia communities are driving directly to Washington Dulles or Reagan National instead of taking a domestic connecting flight first should also be understood in more detail.

These trends should form the backbone of the Commonwealth of Virginia’s air service strategy. In the next chapters, analyses are completed with these national trends in mind. However, a full vulnerability analysis also needs to be completed to understand the risks and opportunities present at each of the Commonwealth’s airports. In the next section, the performance of Virginia airports—and of the Commonwealth’s aviation system as a whole - is benchmarked against its peers to determine these vulnerabilities.

---

<sup>31</sup> Baker, M.B. 2015. “Airlines Pledge Pricing, Capacity Controls Despite Fuel Savings.” Business Travel News 10 March 2015.



# VIRGINIA COMMERCIAL AIR SERVICE STRATEGIC REVIEW

## Chapter 2 – Air Service Vulnerability Benchmarking Analysis

Prepared for  
**Commonwealth of Virginia,  
Virginia Department of Aviation**

Prepared by

**InterVISTAS**

a company of Royal HaskoningDHV



**March 20, 2015**

## Introduction

In Chapter 1 of the Virginia Commercial Air Service Strategic Review, air service and passenger traffic trends were reviewed for each of Virginia’s primary commercial service airports, with reference to national and regional trends. These macro-scale industry trends are important to keep in mind when assessing the performance of Virginia’s airports, since they provide broader industry context for air service decisions made by U.S. and international carriers. For instance, the increase in seats per departure at most of Virginia’s airports over the last decade can be seen as a direct result of up-gauging and the removal of 50-seat regional jet aircraft from many of the U.S. network carriers’ fleets. Overall, the last decade was marked by mixed financial performance among major U.S. carriers, leading to capacity cutbacks, most notably at Small Hubs and Non-Hub airports.

However, not all industry trends are appropriate to apply to all airports. Airline strategies that affect larger airports may not be applicable for smaller airports, or may affect smaller airports in different ways. As a result, a more detailed analysis is required to compare air service performance at Virginia’s airports directly to a set of peers. This approach, which is often called a *benchmarking analysis*, provides a more detailed look at the ways in which Virginia’s airports outperform, underperform, or are on par with their peers in a number of air service metrics.

In this chapter, a full benchmarking analysis is completed for each of Virginia’s nine primary commercial service airports in order to accurately compare these airports’ performance to a set of individually selected peer markets in the nation. This analysis is broken down into several stages, which are described in detail in the methodology review in Section 2 of this chapter.

After the methodology for selecting relevant peers and comparison criteria are established, an in-depth review of peer benchmarking performance is completed for each of Virginia’s airports in Section 3. This section helps identify the ways in which Virginia’s airports outperform or underperform their peers relative to service, traffic, revenue, and connectivity. Section 4 concludes with broader Commonwealth-wide trends and lessons learned from each benchmarking analysis, and highlights targeted areas for air service strategy improvements. Concluding the document are a series of appendices in Section 5 that review, in detail, each of the airport benchmarks and the performance of each of Virginia’s airports relative to its peers.

## 2. Methodology

The benchmarking analysis performed in Chapter 2 consists of four key steps:

- 1. Identify the criteria by which peers are selected for each airport;**
- 2. Select the set of peer airports for each of the Commonwealth of Virginia’s primary commercial service airports based on the selection criteria identified in Step 1;**
- 3. Identify the relevant characteristics by which the airports will be compared to their peers; and**
- 4. Compare the airports according to the characteristics determined in Step 3.**

In this section, the methodology used to complete each of these steps in the benchmarking analysis is discussed.

### 2.1 Identification of Peer Market Selection Criteria

First, in order to identify the airports deemed as appropriate peers for each of Virginia’s primary commercial service airports, a number of selection criteria need to be determined. These criteria should be easy to consistently measure across a variety of airports, and provide meaningful information about the economic and demographic performance of an airport and its associated metropolitan area. Note that air service trends themselves are typically not used as selection criteria in benchmarking analyses, as air service performance will later be compared directly with peers in Steps 4 and 5 of the analysis. Therefore, the selection criteria are primarily limited to demographic and economic factors.

Selection criteria of peer airports should be limited to factors that are likely to influence the amount of passenger traffic and available air service at an airport. From a review of literature on the determinants of passenger traffic and air transportation activity, four selection criteria are defined for use in the peer benchmarking analysis. These four criteria are:

1. Population of the airport’s metropolitan statistical area (MSA), sourced from the U.S. Census Bureau;
2. Gross regional product (GRP) of the airport’s MSA, sourced from Woods & Poole 2014 economic data;
3. Total employment in the airport’s MSA, sourced from Woods & Poole 2014 economic data; and

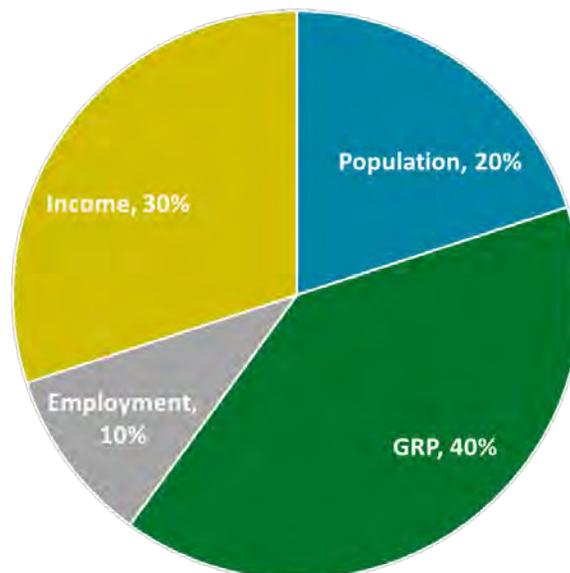
4. Household income per capita for the airport’s MSA, sourced from Woods & Poole 2014 economic data.

The selection criteria is expected to be directly linked to air transportation activity at an airport for a given MSA. For instance, an increase in population or total employment would likely be closely correlated to an increase in air transportation demand, and therefore an increase in service and passengers at an airport. Similarly, as gross regional product and per capita household income increases, air transportation activity would also be likely to increase.

However, each selection criterion does not likely influence air transportation activity in a similar way. For instance, employment in some sectors, such as construction, is not as likely to be closely linked to air transportation activity as employment in other sectors, such as professional services. Therefore, these selection criteria should not be equally weighted when selecting peer airports.

To this end, a selection criteria weighting methodology was created to treat each selection factor slightly differently in the selection of peer airports for each of Virginia’s primary commercial service airports. Instead of an equal-weighting 25 percent split for each selection criterion, the weighting scheme shown in Exhibit 2-1 was used to select potential peer markets:

**Exhibit 2-1: Weighting Factors for Selection of Peer Airports**



As the exhibit shows, gross regional product (in other words, economic activity) was selected as the factor that was most likely to influence air transportation activity at an airport. This was followed closely by per capita income. The logic is that as personal wealth and/or regional economic activity increases, the demand for air transportation services should also increase proportionately. Population and employment were given lower weights—for instance, it is not clear that all types of employment would be equally likely to contribute to demand for air transportation.<sup>1</sup>

## **2.2 Selection of Peer Markets for Virginia’s Primary Commercial Service Airports**

Once the selection criteria for peer airports and their associated weighting factors were determined, peer airports for each of Virginia’s primary commercial service airports could be selected. As a first step, data was gathered from the U.S. Census Bureau and Woods & Poole economic databanks for the four selection criteria identified in Section 2.1. These data were gathered for all MSAs, and airports were assigned into MSAs as appropriate. In the cases in which MSAs had more than one airport, airport-level data was aggregated.

Then, once data was collected for all airports, the weighting algorithm was applied to generate the *potential* list of peer markets. The list of potential peer markets was defined as follows: first, markets were listed in rank-order based on the selection criteria identified in Section 2.1. That is, a list was created listing MSA population, for instance, for all MSAs in the United States, from most populous to least populous. The MSAs that contained Virginia airports were also highlighted.

Then, the ten MSAs that ranked closest to each Virginia MSA that contained a primary commercial service airport were identified. For each airport and each selection criterion, the five markets immediately above and five markets immediately below the Virginia MSA were highlighted. These markets were given a score based on their selection criterion and the associated weight. For instance, if a market was ranked within five positions above or below the Richmond, VA metropolitan statistical area in terms of population, that market would be given a score of 0.2 for Richmond, according to the associated weight for the population selection criterion. All other markets would be given a score of zero for Richmond.

---

<sup>1</sup> Sensitivity analyses were also conducted for each of the selection factors by varying the weights by five percentage points in both directions; these changes resulted in limited changes to the peer airport rankings.

Then, for each Virginia airport, tallies of these scores were created for each other market in the United States. Note that the highest possible market score would be 1.0, if that market was within five ranking positions above or below in each of the four selection criteria—population, income, employment, and GRP. An example *potential* market ranking is shown below in Exhibit 2-2.

**Exhibit 2-2: Example Partial List of Potential Peer Markets for Charlottesville**

Market	Population	Employment	GRP	Income	Grand Total
<b>Topeka, KS</b>	0.2	0.1	0.4		<b>0.7</b>
<b>Bloomington-Normal, IL</b>			0.4	0.3	<b>0.7</b>
<b>Appleton, WI</b>	0.2		0.4		<b>0.6</b>
<b>Lebanon, PA</b>	0.2	0.1		0.3	<b>0.6</b>
<b>Waco, TX</b>		0.1	0.4		<b>0.5</b>
<b>Lake Charles, LA</b>			0.4		<b>0.4</b>
<b>Tri-Cities Regional, TN</b>			0.4		<b>0.4</b>
<b>Mesa, AZ</b>			0.4		<b>0.4</b>
<b>Duluth/Superior, MN</b>			0.4		<b>0.4</b>
<b>Brownsville, TX</b>			0.4		<b>0.4</b>
<b>Erie, PA</b>			0.4		<b>0.4</b>
<b>Charleston, WV</b>	0.2	0.1			<b>0.3</b>
<b>Cedar Rapids, IA</b>				0.3	<b>0.3</b>
<b>Durango, CO</b>				0.3	<b>0.3</b>

While the list of potential peer markets shown in Exhibit 2-2 presents the markets that are most likely to be similar to the relevant Virginia airport, this list may contain some markets that are inappropriate to use as airport peers. That is, other independent characteristics might impact demand patterns to and from peer airports. For instance, significant Southwest Airlines presence would bias results towards high O&D passengers per flight, as the carrier focuses on point-to-point traffic. Results would also be disproportionately oriented towards domestic short-haul traffic.

Additionally, airports with a significant leisure market component, like Las Vegas, NV or Fort Myers, FL, may not be relevant benchmarks, as Virginia’s airports have a more balanced business-leisure mix. Such a discrepancy may impact revenue per flight, revenue per seat, passenger yield, etc. Proximity to a larger hub airport and high traffic leakage away from the peer market should also be considered. Such airports would have disproportionately low passenger numbers compared to otherwise similar markets.

For a specific example, note that Topeka, KS ranks highly in Exhibit 2-2; the Topeka market ranks similarly to Charlottesville in terms of population, employment, and Gross Regional Product. However, Topeka is not a good choice of peer market for Charlottesville—Topeka’s airport has been served only intermittently by commercial carriers over the last decade. Similarly, while Mesa, AZ ranks similarly to Charlottesville in terms of GRP, its airport is served primarily by Allegiant Air, whereas Charlottesville is served mainly by a mix of legacy carriers.

Therefore, each market shortlist was reviewed to select the most relevant matches. Shortlists may not always correspond to the ‘highest-ranked’ airports based on the aforementioned selection criteria. Due consideration was also given to each airport’s FAA hub size peer group. Some examples of characteristics that could lead to exclusion from the peer market list include:

- Mismatch of region size (for instance, a large metropolitan region compared to a very small metropolitan region due to similarities in income);
- Mismatch of service patterns (for instance, an airport served primarily by Southwest Airlines or one or more ULCCs compared to an airport served primarily by network carriers);
- Airports with significantly different business vs. leisure mixes;
- Airports located in multi-airport regions; and/or
- Airports with limited or no commercial service.

Through further refinement of the list of peer markets selected in Section 2.1, InterVISTAS established a list of ten peer airports for each one of Virginia’s nine primary commercial airports. These markets are shown below in Exhibit 2-3.<sup>2</sup>

---

<sup>2</sup> Note that peer regions were selected on the regional (metropolitan statistical area) level, so the two airports in the Washington, DC metropolitan area were ranked together.

**Exhibit 2-3: Peer Markets for Each of Virginia’s Primary Commercial Service Airports**

<b>Charlottesville</b>	<b>Lynchburg</b>	<b>Newport News</b>	<b>Norfolk</b>
Charleston, WV	Binghamton, NY	Bloomington-Normal, IL	Tulsa, OK
Bloomington-Normal, IL	Sioux Falls, SD	Monroe, LA	Jacksonville, FL
Appleton, WI	Monroe, LA	Moline, IL	Providence, RI
Champaign, IL	Cedar Rapids, IA	Fort Smith, AR	Milwaukee, WI
Waco, TX	Yakima, WA	Greenville, NC	Oklahoma City, OK
Lake Charles, LA	Waco, TX	Jacksonville, NC	Rochester, NY
Tri-Cities Regional, TN	College Station, TX	College Station, TX	Burbank, CA
Duluth/Superior, MN	Ft. Walton Beach, FL	Champaign, IL	Columbus, OH
Cedar Rapids, IA	Moline, IL	Binghamton, NY	Louisville, KY
Erie, PA	Amarillo, TX	Saginaw, MI	Hartford, CT

**Exhibit 2-3 (con’t.): Peer Markets for Each of Virginia’s Primary Commercial Service Airports**

<b>Richmond</b>	<b>Roanoke</b>	<b>Shenandoah Valley</b>	<b>Northern Virginia</b>
Birmingham, NY	Evansville, IL	Kingman, AZ	Los Angeles, CA
Hartford, CT	Columbus, GA	Beckley, WV	Chicago, IL
Jacksonville, FL	South Bend, IN	Cape Girardeau, MO	Dallas/Ft. Worth, TX
Raleigh/Durham, NC	Lafayette, LA	Watertown, NY	Houston, TX
Louisville, KY	Green Bay, WI	Jamestown, NY	Philadelphia, PA
Oklahoma City, OK	Lincoln, NE	Clarksburg, WV	Atlanta, GA
Providence, RI	Eugene, OR	St George, UT	Boston, MA
Burbank, CA	Salisbury-Ocean City, MD	Augusta, ME	Phoenix, AZ
Milwaukee, WI	Tri-Cities Regional, TN	San Angelo, TX	San Francisco, CA
Westchester County, NY	Sioux Falls, SD	Williamsport, PA	Detroit, MI

## 2.3 Selecting Relevant Characteristics for Comparison

Now that the list of peer markets has been identified for each of Virginia’s primary commercial service airports, the benchmarking comparison can begin. However, factors need to be selected as a basis for comparison. To complete the analysis, airports were compared based on the quantity and quality of their available service, as well as their passenger traffic and route performance relative to demographic characteristics.

The following characteristics<sup>3</sup> were used to compare airports against others in their peer group:

- **Origin-destination passengers per seat:** This metric reflects the proportion of available seat capacity that is filled by passengers.
- **Origin-destination revenue per seat:** This metric shows how much revenue an airline can expect to obtain per available seat in an airport.
- **Origin-destination passengers per capita:** This metric measures “propensity to fly,” and describes how many trips are taken from that airport by an average resident of an airport’s metropolitan statistical area in a given year.
- **Origin-destination passengers per flight:** This provides a metric of average aircraft size and suggests the types of aircraft operated from a given airport.
- **Origin-destination revenue per flight:** This metric is similar to origin-destination revenue per seat, but is computed on the flight departure level. Again, airports with a greater proportion of narrowbody and large regional-jet departures are likely to see greater origin-destination revenue per seat than airports with a large proportion of flights operated by smaller regional jets.
- **Domestic load factor:** This metric shows the percentage of seats filled on an average flight from the airport.
- **The Massachusetts Institute of Technology (MIT) Airport Connectivity Quality Index (ACQI) score:** This score measures an airport’s connection to the worldwide air

---

<sup>3</sup> Data was gathered from Innovata SRS schedule data, DOT T-100 data, and DOT DB1B data via Diio Mi, as well as the Airport Connectivity Quality Index from the Massachusetts Institute of Technology. Data from the full year 2014 was collected where available; data was only available until 3Q 2014 for DB1B (origin-destination passenger) data.

transportation network based on the quantity and quality of available nonstop flights and one-stop connections. A higher score represents a higher degree of connectivity.<sup>4</sup>

## 2.4 Comparison of Airports to their Peer Groups

Airports in Virginia were benchmarked against their peer groups with each of the metrics identified above, as well as against all airports in their FAA hub size peer group.<sup>5</sup> The overall results of these analyses provide insight into how well Virginia’s airports are performing relative to their peers. In the next section, the results of these benchmarking analyses are explored in detail for each of Virginia’s airports, and conclusions are drawn on an airport-by-airport level.

---

<sup>4</sup> Additional information about the MIT ACQI score can be found in the following peer-reviewed study: Wittman, M. and W. Swelbar. 2014. Capacity Discipline and the Consolidation of Airport Connectivity in the United States. Transportation Research Record: Journal of the Transportation Research Board No. 2449, 72-78.

<sup>5</sup> Recall that the Federal Aviation Administration (FAA) designates each primary commercial service airport in the United States into exactly one “hub type” based solely on the airport’s level of enplanements in the previous year. The four hub types are Large Hub, Medium Hub, Small Hub, and Non-hub. The hub types are descriptive only, and do not suggest that an airport is a connecting hub for a U.S. network carrier.

## Results of the Benchmarking Analysis

In this section, the results of the benchmarking analysis described in Section 2 are explored and detailed. Airports are compared based on their performance in 2005 and 2014—before and after the recession and the capacity discipline movement that began in earnest in the United States. For each airport, trends in capacity, traffic, revenue, and connectivity are compared to the peer markets identified in Section 2, as well as to all airports in that airport’s FAA hub type.

In this section, airports are discussed in alphabetical order by three-letter IATA airport code.

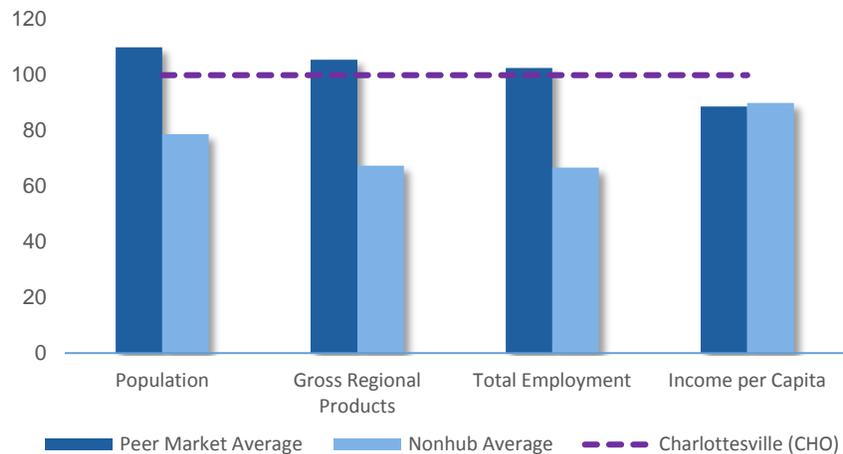
### 2.5 Charlottesville-Albemarle Airport (CHO)

Charlottesville and its peer markets present overall encouraging demographics compared to the overall U.S. non-hub average. The average population among peer markets is roughly 10 percent higher than that of Charlottesville, though the total employment figures are similar. The income per capita is overall higher in Charlottesville, implying that jobs are both more numerous and perhaps pay higher than in peer markets.

#### Exhibit 3-1: Peer Markets for Benchmarking – Charlottesville



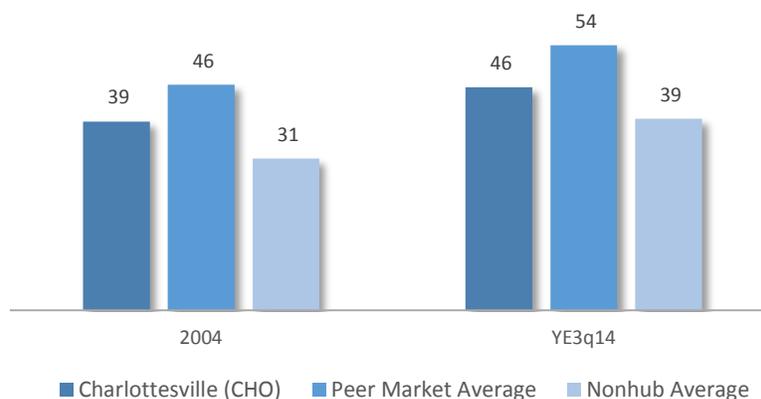
**Exhibit 3-2: Charlottesville Compared with Peer Market and Nonstop Average in Key Demographic & Economic Indicators (Index: Charlottesville=100)**



Source: Woods & Poole Economics 2014. InterVISTAS analysis.

Between 2004 and 2014, Charlottesville mirrored a nationwide trend of increased number of seats per departure, reflecting an aircraft up-gauge in most short-haul markets. Though Charlottesville still retains service with smaller equipment compared to its peer markets, the average number of seats per departure has increased roughly 1.9 percent per year between 2004 and 2014; this pace is very similar to a 1.8 percent yearly increase in peer markets. An average of 46 seats per departure in 2014 shows that Charlottesville still relies on regional jets and turboprops for the majority of its services, as shown on Exhibit 3-3. As these regional jets are being phased out and replaced by 70-90 seat regional jets and turboprops, the trend in up-gauging is likely to continue in Charlottesville.

**Exhibit 3-3: Average Seats per Departure at Charlottesville- Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

As demonstrated in Chapter 1, demand for air transportation in the United States has shown signs of growth recently, though most carriers have not responded with an increase in capacity. This leads to higher load factors on most flights, and more traffic per available seat. Charlottesville is reflecting this trend; in 2004, the airport was generating about 14 percent less O&D traffic per available seat, compared to its peer markets, as shown in Exhibit 3-4. CHO’s performance was closer to those of Non-Hub markets, which typically present lower population and GDP per capita. However, in 2014, CHO presented similar O&D traffic figures per seat to those of peer markets.

**Exhibit 3-4: Average O&D Traffic per Seat at Charlottesville -- Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

Average O&D revenue per seat has almost doubled in many U.S. markets, due to increasing demand, little to no increase in capacity, and higher fares. CHO’s performance has been on par with those of peer markets, generating roughly six percent additional O&D revenue per seat on domestic flights. Though Non-Hub airports have experienced such an increase, their increases in per-seat revenue have not been as significant on a percentage basis over the past decade.

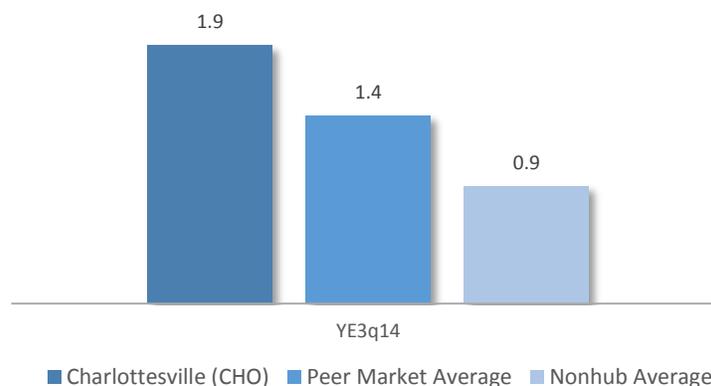
**Exhibit 3-5: Average O&D Revenue per Seat at Charlottesville – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

Charlottesville scores particularly high on O&D traffic per capita. This is a sensible reflection of the city’s demographics; it has high total employment and higher GDP per capita for comparable lower populations compared to its peer markets. Charlottesville generates 35 percent more O&D traffic per capita than peer markets and more than twice the amount that Non-Hub airports generate on average, as shown in Exhibit 3-6.

**Exhibit 3-6: Average O&D Traffic per Capita at Charlottesville - Domestic**

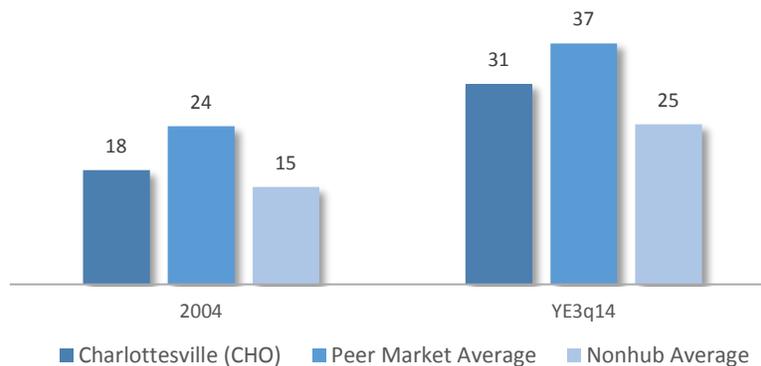


Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

The O&D traffic per flight has increased significantly over the last decade, which is consistent with most U.S. carriers’ strategy of capacity discipline. Multiple frequencies are often condensed into fewer flights operated by larger aircraft. It is then not surprising that Charlottesville generates more O&D traffic on each flight, as each departure has a higher number of seats. The gap between Charlottesville and the peer market average has shrunk over the last decade;

comparable airports generated 33 percent more O&D traffic per flight in 2004, compared to 19 percent more in 2014. In contrast, U.S. Non-Hubs have shown declining O&D numbers per flight over the same period as shown in Exhibit 3-7.

**Exhibit 3-7: Average O&D Traffic per Flight at Charlottesville - Domestic**



Source: US DOT, DB1B database, Innovata schedules, via Diio online portal. InterVISTAS analysis.

Although CHO generates less revenue per flight compared to its peer markets, this gap has shrunk over the past decade; from 29 percent in 2004 to 20 percent in 2014. Once again, aircraft size is a contributing factor; each departure has more seats, which in turn generates higher per-flight revenue numbers. It is important to mention that Charlottesville’s per flight revenue is significantly above those of fellow Non-Hub airports in the United States.

**Exhibit 3-8: Average O&D Revenue per Flight at Charlottesville - Domestic**



Source: US DOT, DB1B database, Innovata schedules, via Diio online portal. InterVISTAS analysis.

Consistent with national trends, the average load factors out of Charlottesville, peer markets and Non-Hubs have increased significantly over the last decade. As demand increased, major U.S. carriers only added little to no capacity, resulting in fuller aircraft. While Charlottesville’s load factor was lower than those of both peer markets and the Non-Hub average, Charlottesville

dramatically improved its performance and is now on par with peer markets. This corresponds to a yearly increase of slightly more than two percentage points.

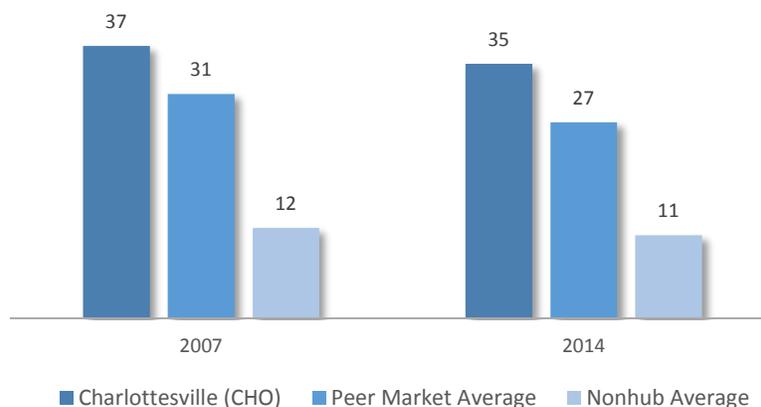
**Exhibit 3-9: Average Load Factor at Charlottesville - Domestic**



Source: US DOT T-100 database, via Diio online portal.

Charlottesville scores much higher on MIT’s ACQI connectivity index than peer markets and Non-Hub markets. This implies that CHO is connected to many U.S. major hubs with more frequent services than its peers. The airport is served by all three major carriers, a considerable asset when compared to airports of its size.

**Exhibit 3-10: MIT ACQI Connectivity Score for Charlottesville**



Source: Massachusetts Institute of Technology Airport Connectivity Quality Index.

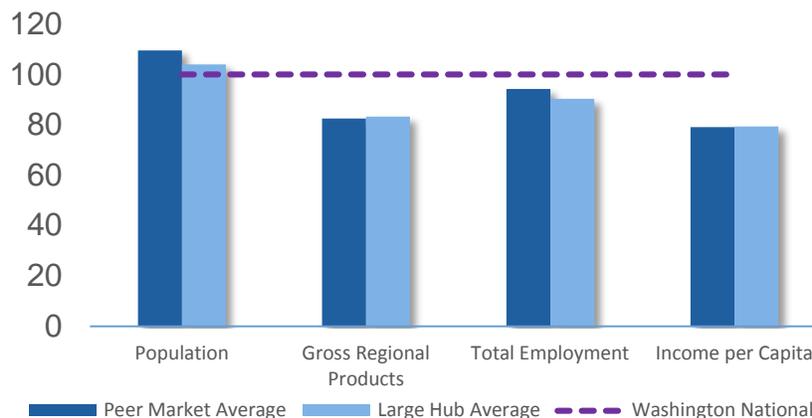
## 2.6 Ronald Reagan Washington National Airport (DCA)

Though Reagan National airport presents several unique characteristics detailed in Chapter 1, it is most relevant to benchmark Washington D.C. against cities of similar demographics. As shown on exhibit 3-11, the Washington D.C. region presents significantly higher GDP per capita and slightly higher total employment. The Gross Regional Product is also considerably higher in Washington D.C., though the city ranks lower on population. Reagan National’s market is thus home to a smaller but wealthier population.

**Exhibit 3-11: Peer Markets for Benchmarking – Reagan National**



**Exhibit 3-12: Washington D.C. Compared with Peer Market and Large Hub Average in Key Demographic & Economic Indicators (Index: Washington D.C. =100)**

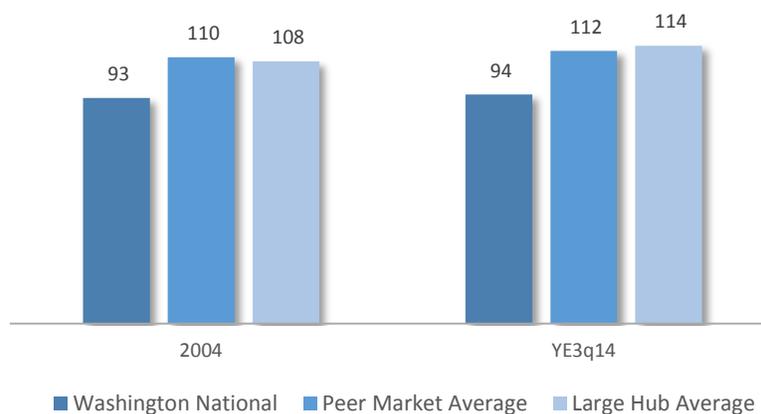


Source: Woods & Poole Economics 2014. InterVISTAS analysis.

Reagan National’s perimeter rule, as detailed in Chapter 1, implies that flights can only be operated to destinations located within 1,250 miles.<sup>6</sup> This makes the use of smaller aircraft with shorter range capabilities more likely, putting downward pressure on the average aircraft size for domestic flights. It is important to note that while up-gauging is more perceptible at smaller airports as regional jets and turboprops are phased out and replaced by larger regional aircraft, at large hubs, where regional jets and turboprops can account for a smaller proportion of traffic, this trend is less perceptible.

Though regional jets and turboprops are not used as often as in the past at Reagan National, legacy carriers have also been using more 70-90 regional jets instead of Airbus and Boeing narrowbodies. This leads to a small net variation on the average seats per departure, as shown in Exhibit 3-13. Up-gauging has been slower at Reagan National than in peer markets, where average seats per departure increased only 0.1 percent per year, compared to 0.2 percent and 0.6 percent for peer markets and Large Hubs respectively.

**Exhibit 3-13: Average Seats per Departure at Reagan National – Domestic**



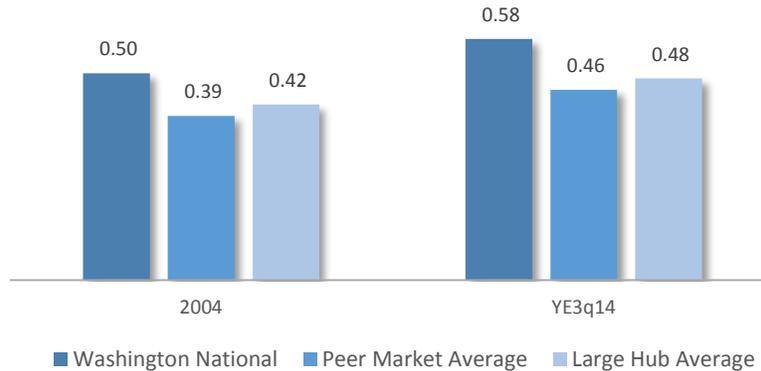
Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

Reagan National has consistently generated more O&D traffic per available seat than both its peer markets and other Large Hubs. It has also shown robust growth for this index; O&D traffic per seat has been growing at 1.7 percent per year over the last decade; peer markets have however shown a yearly growth rate of 1.9 percent, above that of Large Hubs, of about 1.5 percent. It is important to note that Reagan National has a higher propensity towards domestic

<sup>6</sup> Some exceptions to the perimeter rule have been granted that allow for flights to destinations farther than 1,250 miles on a limited basis. Slots at Reagan National for destinations outside the perimeter are shared between several legacy and low cost carriers.

flights, which is not taken into account in Exhibit 3-14. Large Hubs may generate just as much traffic, though with a higher international to domestic ratio.

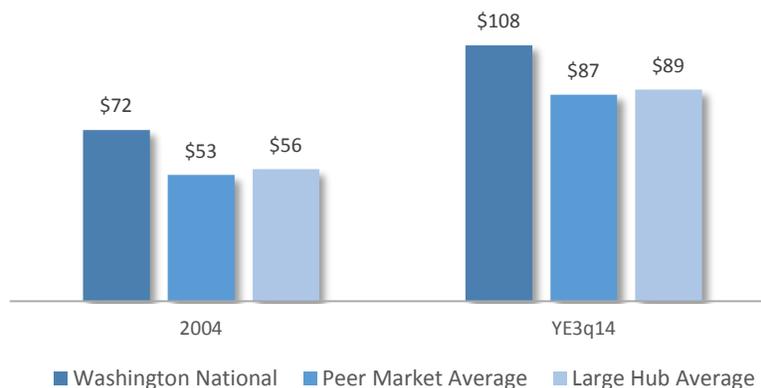
**Exhibit 3-14: Average O&D Traffic per Seat at Reagan National – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

Reagan National generates significantly more revenue per seat than comparable Large Hubs. As is common in the United States, this indicator has almost doubled over the past ten years, due to capacity cuts and robust demand. The airport’s propensity towards business traffic may also command higher fares. The revenue increase per seat has, however, been slightly slower at Reagan National than at peer markets and other large hubs, at 4.7 percent, 5.7 percent, and 5.3 percent per year respectively. This revenue increase might be further slowed down by the US Airways and American Airlines merger. Though post-merger American Airlines still holds a majority of enplanements, the carrier had to give up 52 slot pairs to low cost carriers. This is expected to put downward pressure on airfares and average revenue per seat when all slots are fully transferred.

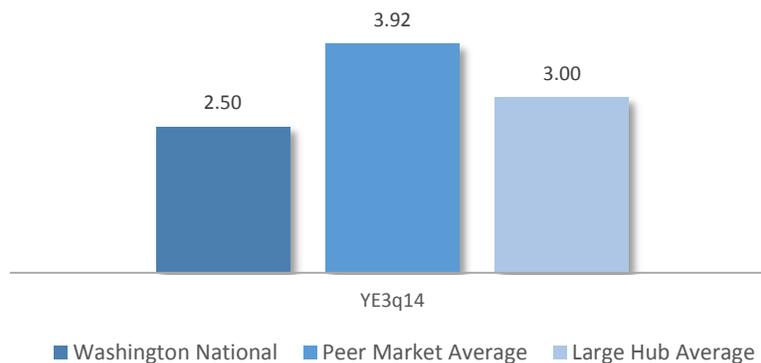
**Exhibit 3-15: Average O&D Revenue per Seat at Reagan National – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

Despite encouraging demographics, Washington D.C. only generates slightly more than sixty percent of the O&D traffic per capita. Washington’s metropolitan area has three large hubs; Reagan National, Dulles and Baltimore. This makes it unique among its peer markets, which typically have fewer alternate airports, if any. Each airport in Washington D.C. may then generate only a fraction of the region’s total traffic per capita. Perimeter rules also make traffic leakage from Reagan National to Dulles necessary to reach medium haul domestic destinations without stopovers. Thus, despite encouraging demographics, Reagan National does not generate outstanding traffic per capita compared to large hubs.

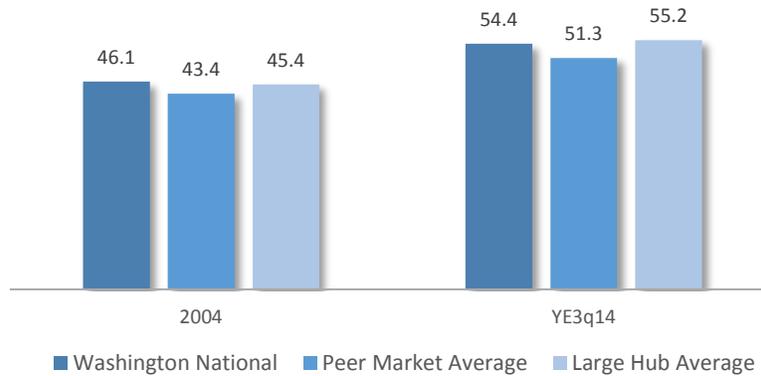
**Exhibit 3-16: Average O&D Traffic per Capita at Reagan National – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

The increase in traffic per flight is in line with the national trend of aircraft up-gauging as the indicator in Exhibit 3-17 shows a robust increase at Reagan National, peer markets and Large Hubs. The growth in Reagan has been faster than at peer markets over the last decade; traffic per flight grew 2.1 percent per year compared to 1.9 percent respectively. This growth at Reagan National is upheld by the recent entry of low cost carriers. Such airlines focus on O&D traffic on large single-aisle aircraft, rather than the smaller regional jets with fewer than 90 seats typically used by legacy carriers.

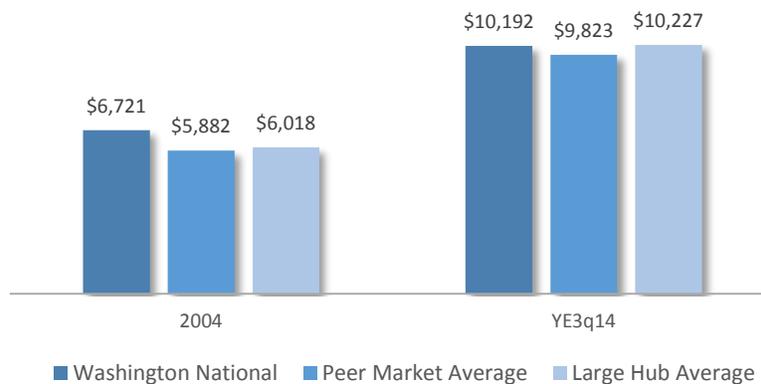
**Exhibit 3-17: Average O&D Traffic per Flight at Reagan National– Domestic**



Source: US DOT, DB1B database, Innovata schedules, via Diio online portal. InterVISTAS analysis.

Average O&D revenue per flight has increased drastically since 2004 due to reduced operations, aircraft up-gauging and higher fares, as shown in Exhibit 3-18. Reagan National is still a strong revenue generator among Large Hubs, and has stayed ahead of peer markets in this ranking. However, the yearly revenue growth per flight has been slower than at peer markets and other Large Hubs. Per-flight revenue at Reagan National has grown at 4.7 percent per year, compared to 5.9 percent for peer markets and 6.1 percent for Large Hubs.

**Exhibit 3-18: Average O&D Revenue per Flight at Reagan National – Domestic**

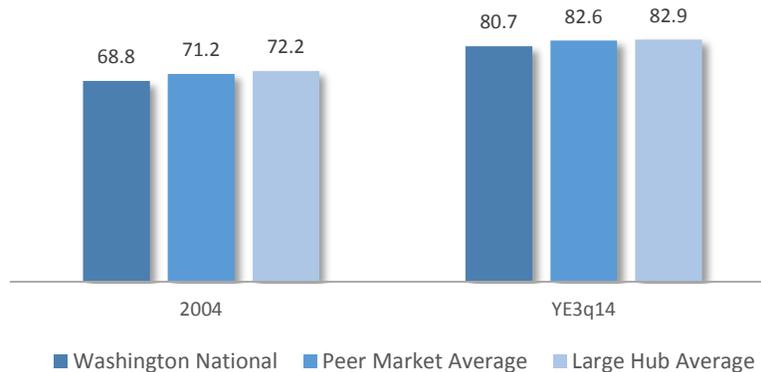


Source: US DOT, DB1B database, Innovata schedules, via Diio online portal. InterVISTAS analysis.

From 2004 to 2014, overall capacity and enplanements have been reduced. Load factors have improved as the number of enplanements was decreasing slower than capacity. This is a nationwide trend, reflecting the industry’s capacity discipline; aircraft are on average fuller as major U.S. legacy carriers maintain flat capacity as traffic increases. Reagan National is no exception, and its load factor has increased at a similar pace as that of peer markets and Large

Hubs – roughly 1.8 percent yearly. Reagan National still ranks overall slightly behind peer markets.

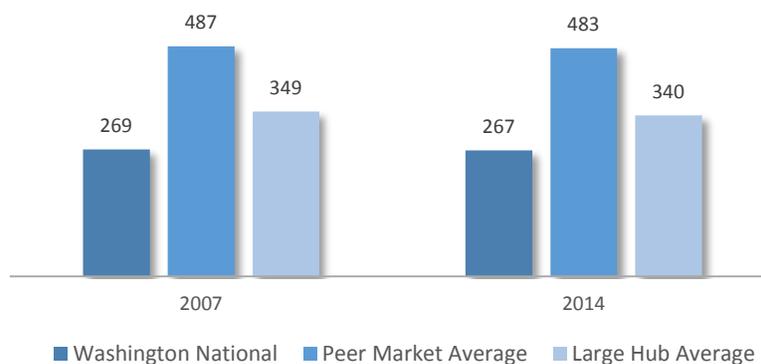
**Exhibit 3-19: Average Load Factor at Reagan National– Domestic**



Source: US DOT T-100 database, via Diio online portal.

Reagan National scores much lower on connectivity than peer markets with similar demographics. Connectivity is limited at Reagan National, though the airport does have suitable runway and terminal infrastructure to receive most narrow body aircraft. The perimeter rule does restrict air service to cities located fewer than 1,250 miles from the airport, which rules out any air service expansion to hubs outside this perimeter, though some exceptions have been granted. Without considering this rule, the lack of customs facilities at Reagan National restricts flight to domestic services and to airports equipped with U.S. pre-clearance facilities. The airport has limited international air service, with three destinations in Canada served nonstop. It is thus understandable that Reagan National scores below its peers on connectivity.

**Exhibit 3-20: MIT ACQI Connectivity Score for Reagan National**



Source: Massachusetts Institute of Technology Airport Connectivity Quality Index.

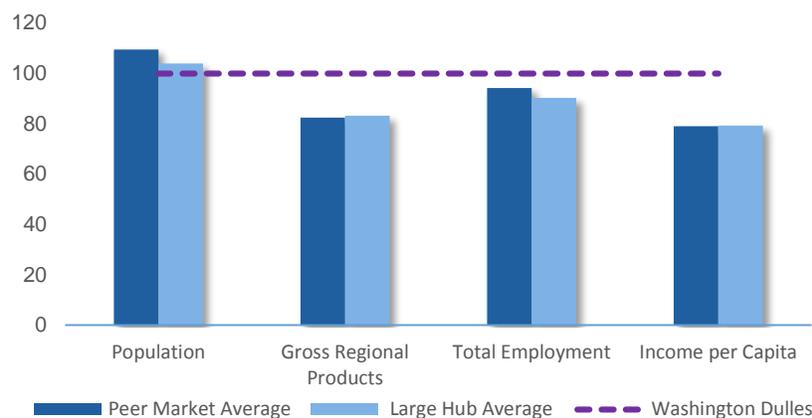
## 2.7 Washington Dulles International Airport (IAD)

As a Large Hub airport serving one of the largest metropolitan areas in the country, Washington Dulles' group of peer airports also contains a number of the country's largest airports and metropolitan regions, as shown in Exhibit 3-21. As with Reagan National, all Large Hub airports in each peer market have been aggregated together for this analysis. Note that since Washington Dulles and Reagan National both serve the same MSA, their lists of peer markets (which are determined on a regional level) and demographic and economic comparisons are both the same.

**Exhibit 3-21: Peer Markets for Benchmarking – Washington Dulles**



**Exhibit 3-22: Washington Compared with Peer Market and Nonstop Average in Key Demographic & Economic Indicators (Index: Washington=100)**

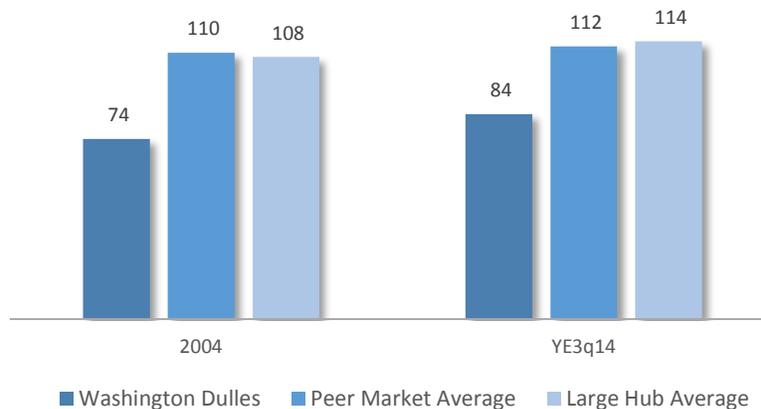


Source: Woods & Poole Economics 2014. InterVISTAS analysis.

As mentioned in Chapter 1, Washington Dulles has a significant amount of nonstop international service, and its international portfolio is one of the great strengths of Virginia’s air transportation system. However, to allow for parity in the benchmarking analysis between Washington Dulles and other, small airports in the Commonwealth of Virginia, domestic passenger traffic and capacity data is used for many of these analyses—similar to each of the other benchmarking reviews completed in this section.

As an airport at which a majority of domestic service is operated with regional jet and turboprop equipment, it is not surprising that Washington Dulles’ seats per departure are on average lower than both their peers and the Large Hub average, as shown in Exhibit 3-23. Although seats per departure have increased as airlines, including United Airlines, up-gauged their fleets, the pullback in growth of low-cost carriers at Washington Dulles has prevented seats per departure from reaching the levels seen by its peers.

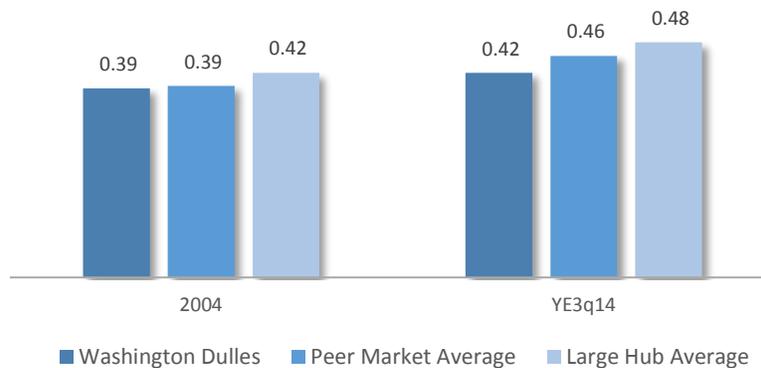
**Exhibit 3-23: Average Seats per Departure at Washington Dulles – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

In 2004, Washington Dulles was on par with its peers in terms of domestic O&D passengers per seat. However, as domestic traffic levels have fallen overall at Washington Dulles, the airport’s peers now have a higher traffic per seat value than Washington Dulles, as shown in Exhibit 3-24. Both Washington Dulles and its peer group also rank below the Large Hub average.

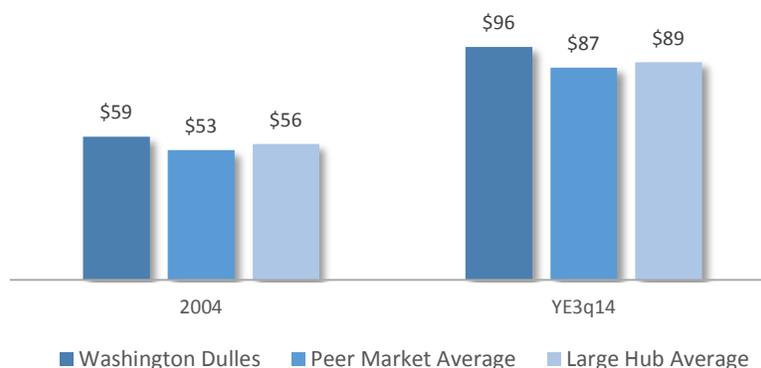
**Exhibit 3-24: Average O&D Traffic per Seat at Washington Dulles – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

Yet as an airline hub, Dulles is able to command greater O&D revenue per domestic seat than both its peers and the Large Hub average, as shown in Exhibit 3-25. Washington Dulles’ average revenue per seat of \$95.80 surpassed its peer average by over \$8.50 per seat in 2014. Among its peers, Washington Dulles ranked behind only Boston, San Francisco, and Los Angeles in terms of domestic O&D revenue per seat in 2014.

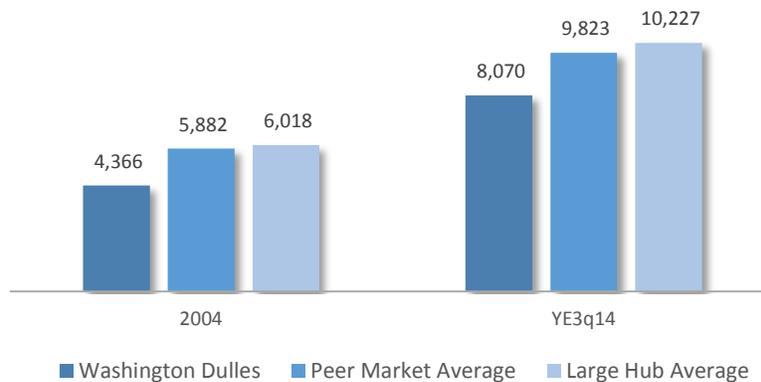
**Exhibit 3-25: O&D Revenue per Seat at Washington Dulles – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

However, on a per-flight basis, Washington Dulles’ O&D revenue falls below both the peer market average and the Large Hub average. This is likely due solely to the fact that Washington Dulles’ average seats per departure for domestic flights were more than 20 percent smaller than its peer markets and the Large Hub average. As a result, the revenue per flight for Washington Dulles would also be more likely to be smaller.

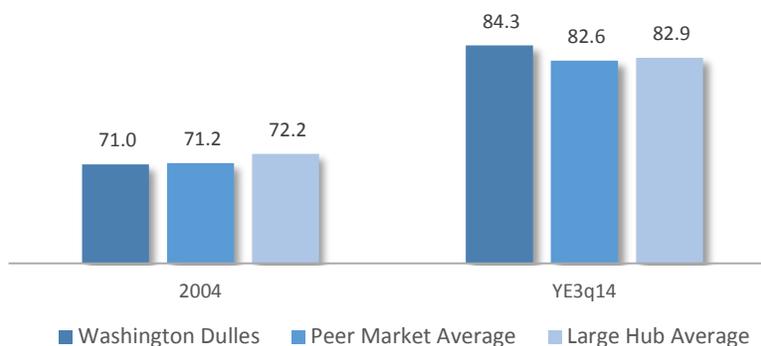
**Exhibit 3-26: O&D Revenue per Flight at Washington Dulles – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

One bright spot for Washington Dulles is its average domestic load factor relative to its peers and the Large Hub average. Not only did Washington Dulles’ 2014 load factor of 84.3 rank above the average of its peers, it ranked higher than any of the 10 peer markets individually in that year. While Washington Dulles’ seats per departure trends help to bolster load factors, this strong performance should not be understated in an era of capacity cutting and flat passenger growth.

**Exhibit 3-27: Average Load Factor for Domestic Flights at Washington Dulles**

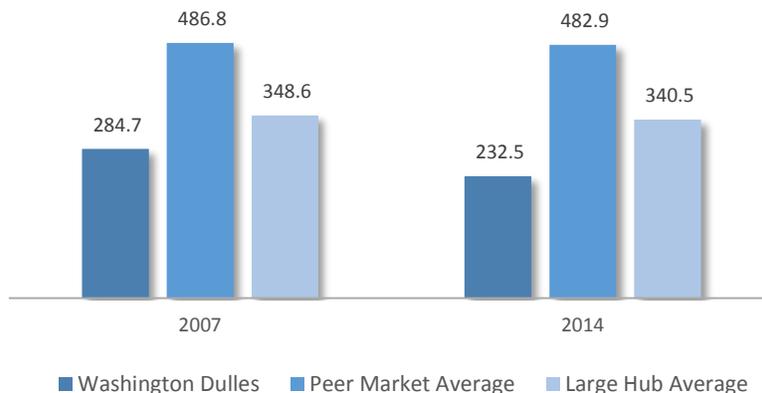


Source: US DOT T-100 database, via Diio online portal.

Finally, in terms of connectivity, Washington Dulles ranked lower than both its peers and the Large Hub average. It should be noted, though, that some peer markets contain more than one airport, which would increase the region’s connectivity relative to Washington Dulles alone. If Reagan National’s connectivity score was added to Washington Dulles’, the Washington region

would have a total connectivity score of 499.5 and rank higher than the peer market average in 2014.

**Exhibit 3-28: MIT ACQI Connectivity Score for Washington Dulles**



Source: Massachusetts Institute of Technology Airport Connectivity Quality Index.

## 2.8 Lynchburg Regional Airport (LYH)

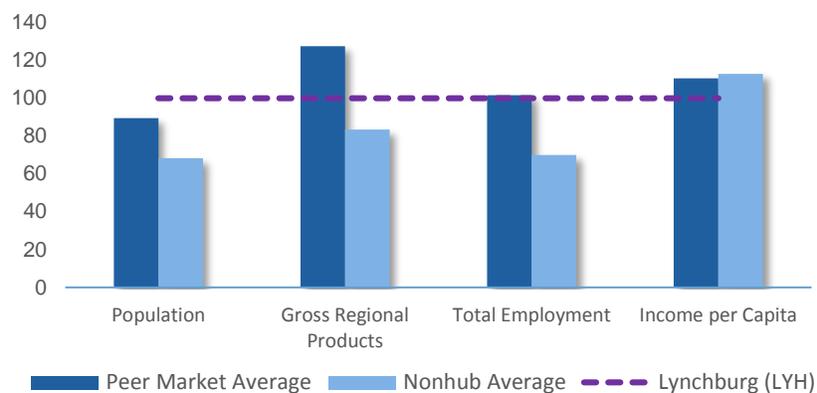
Although Lynchburg’s passenger enplanements put the airport squarely in the middle of the Non-Hub airport category, its demographics and economic variables generated a list of peer airports that included some Small Hub airports, as shown in Exhibit 3-29.

**Exhibit 3-29: Peer Airports for Benchmarking – Lynchburg**



Even though its list of peer airports contained some Small Hubs, Lynchburg’s population and total employment were either on par or above its peer airports that also face a competitive and overlapping catchment area. However, its peers slightly outperformed Lynchburg in some economic measures, including GRP and income per capita. In population, GRP, and total employment, Lynchburg and its peers both outperformed the Non-Hub average, as shown in Exhibit 3-30.

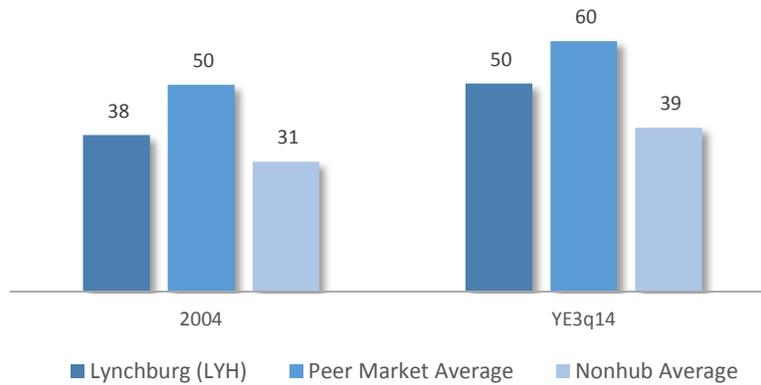
**Exhibit 3-30: Lynchburg Compared with Peer Market and Nonstop Average in Key Demographic & Economic Indicators (Index: Lynchburg=100)**



Source: Woods & Poole Economics 2014. InterVISTAS analysis.

Although Lynchburg serves only a single destination—Charlotte, NC—its average aircraft size has seen an increase in the last ten years, from roughly 38 in 2004 to 50 in 2014. In both years, Lynchburg’s average aircraft size was greater than the Non-Hub average. However, Lynchburg’s peers supported larger aircraft types on average, including some 76-seat regional jets and even narrowbody service at some peers.

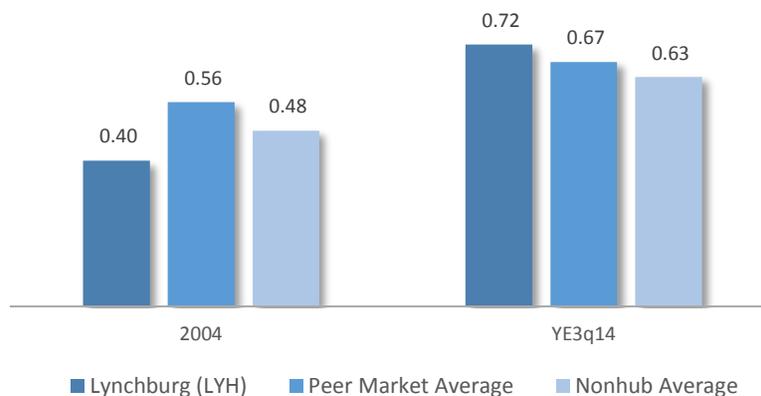
**Exhibit 3-31: Average Seats per Departure at Lynchburg – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

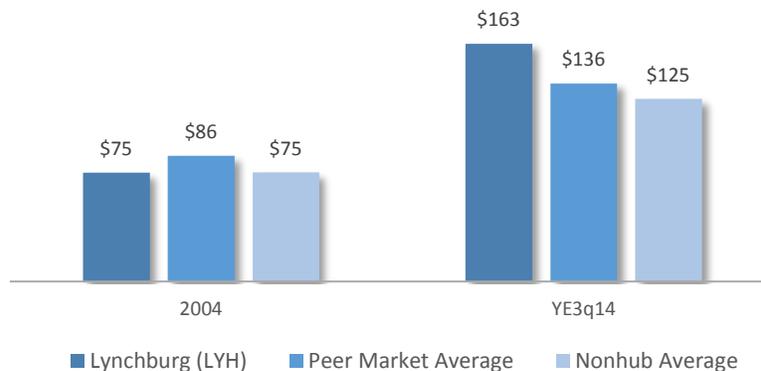
In 2004, Lynchburg’s average O&D traffic and revenue per seat ranked below its peers and the Non-Hub average. However, since then, Lynchburg has seen significant growth. Despite (or perhaps causing) an increase in average aircraft size, Lynchburg’s average traffic per seat nearly doubled from 0.4 passengers in 2004 to 0.72 passengers in 2014. This value now exceeds both its peers and the Non-Hub average. This increase in passengers was coupled with a significant increase in O&D revenue per seat from \$75 in 2004 to \$163 in 2014—over \$25 more per seat than its peer average.

**Exhibit 3-32: Average O&D Traffic per Seat at Lynchburg – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

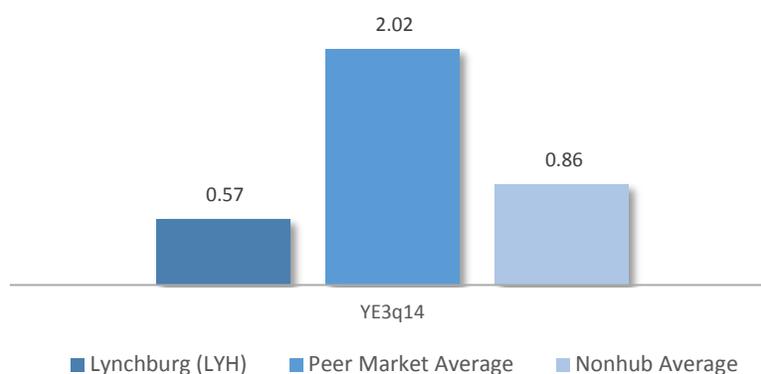
**Exhibit 3-33: Average O&D Revenue per Seat at Lynchburg – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

This increase in passengers and revenue comes despite a propensity to travel in the Lynchburg area that was much lower than its peers. Lynchburg’s peers generated about two passengers per capita on average in 2014, compared to just 0.6 passengers per capita in the Lynchburg region. This suggests the possibility for untapped potential in the Lynchburg area to increase passenger numbers by boosting propensity to travel.

**Exhibit 3-34: Average O&D Traffic per Capita at Lynchburg – Domestic**

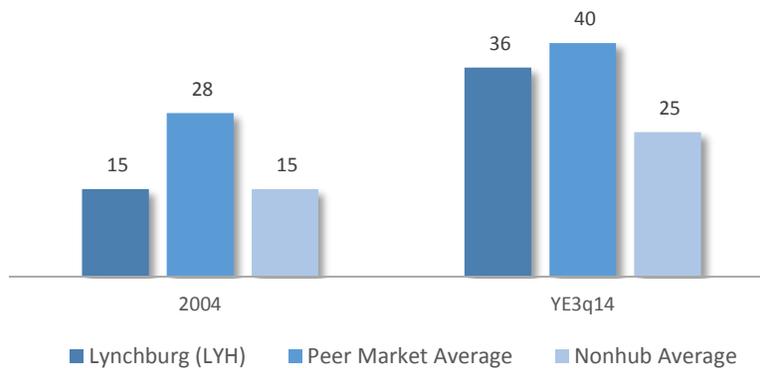


Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

As Lynchburg’s average aircraft size has increased, the average number of passengers and revenue per flight have both increased, as shown in Exhibits 3-35 and 3-36. Despite the fact that Lynchburg’s O&D passengers per flight are currently lower than its peers, O&D revenue per flight at Lynchburg has improved to be greater than its peer average in 2014. This speaks to the same pattern of an increase in revenue per seat, and shows that the business environment in

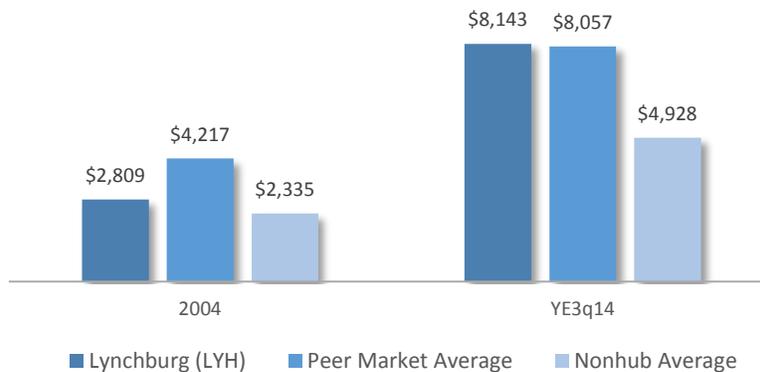
Lynchburg is such that it provides airlines with strong revenue performance—the fact that there is only a single carrier serving the Lynchburg area may be related to this trend.

**Exhibit 3-35: Average O&D Traffic per Flight at Lynchburg – Domestic**



Source: US DOT, DB1B database, Innovata schedules, via Diio online portal. InterVISTAS analysis.

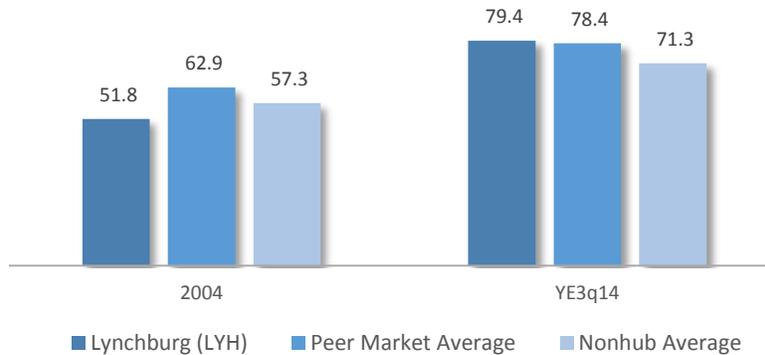
**Exhibit 3-36: Average O&D Revenue per Flight at Lynchburg – Domestic**



Source: US DOT, DB1B database, Innovata schedules, via Diio online portal. InterVISTAS analysis.

Lynchburg’s load factor performance has also improved in recent years, increasing by over 27 percentage points despite an increase in aircraft size, and the likely catalyst for this increase is the airport’s work on creating a competitive fare structure for the market. Lynchburg’s average load factor of 79.4 percent now ranks above its peers and the average of Non-Hub airports, as shown in Exhibit 3-37.

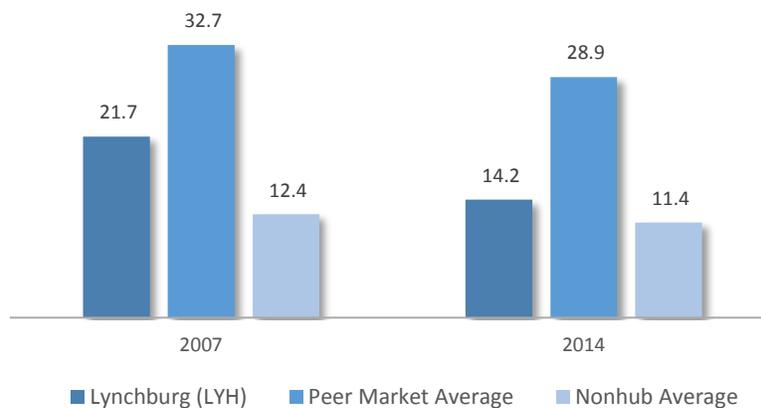
**Exhibit 3-37: Average Load Factors at Lynchburg – Domestic**



Source: US DOT T-100 database, via Diio online portal.

Finally, since Lynchburg currently serves only a single destination, it is not surprising that its connectivity score is lower than peers that serve multiple destinations. However, it is interesting to note that Lynchburg’s connectivity still remains above the Non-Hub average—this speaks to the significant increase in connecting options available at Lynchburg’s sole destination—Charlotte, NC—and the domestic and international growth that US Airways has put into place at Charlotte over the last decade.

**Exhibit 3-38: MIT ACQI Connectivity Score for Lynchburg**



Source: Massachusetts Institute of Technology Airport Connectivity Quality Index.

## 2.9 Newport News Williamsburg International Airport (PHF)

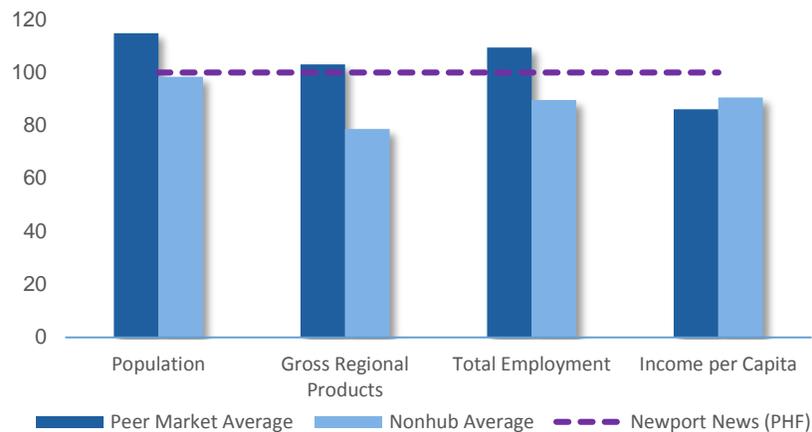
Newport News is a Non-Hub airport located in a metropolitan region of roughly 180,000 people—similar to the nationwide Non-Hub average. Its peer markets were selected as a basket of Non Hub airports in the Midwest and Northeast, as well as two airports in North Carolina, as shown in Exhibit 3-39:

**Exhibit 3-39: Peer Markets for Benchmarking for Newport News**



Among its peer airports, Newport News is slightly smaller in terms of population and total employment, although gross regional product for Newport News is fairly similar to its peers. Like many Virginia airports, Newport News' income per capita ranked above the other airports in its peer group, as shown in Exhibit 3-40. Newport News also ranks above the Non-Hub average in each of the demographic and economic selection criteria.

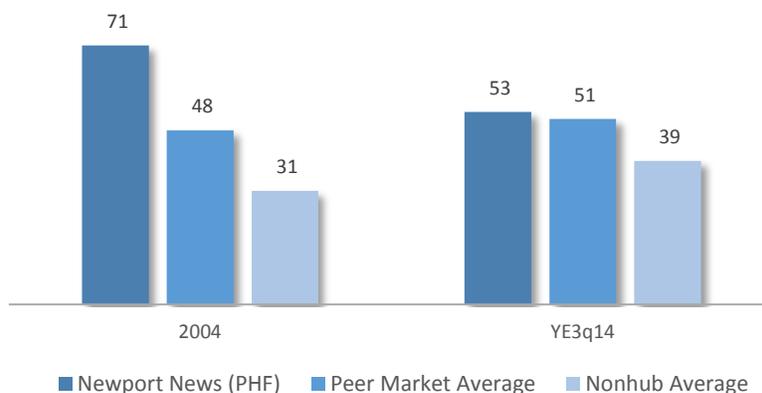
**Exhibit 3-40: Newport News Compared with Peer Market and Nonstop Average in Key Demographic & Economic Indicators (Index: Newport News=100)**



Source: Woods & Poole Economics 2014. InterVISTAS analysis.

Unlike many of its Non-Hub peers, Newport News had a significant amount of narrowbody service in 2004 as a result of the presence of AirTran Airways. As AirTran Airways exited the market, the average number of seats per departure at Newport News has moved closer to the average of its peers, as shown in Exhibit 3-41. From 2004 to 2014, average seats per departure at PHF decreased from 71 to 53, while seats per departure among Newport News' peers increased slightly from 48 to 51.

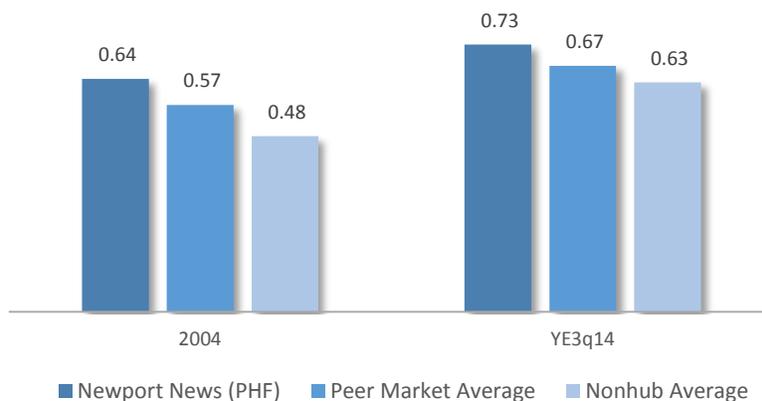
**Exhibit 3-41: Average Seats per Departure at Newport News - Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

Mostly as a result of reductions in seat capacity between 2004 and the year ended 3Q 2014, average O&D traffic per seat at Newport News increased by 15 percent from 2004 to 2014, compared to a 19 percent increase among peers over the same time period. In both time periods, Newport News’ O&D traffic per seat exceeded both the Non Hub average and its peers, suggesting that capacity at Newport News has been closely tracked to match demand.

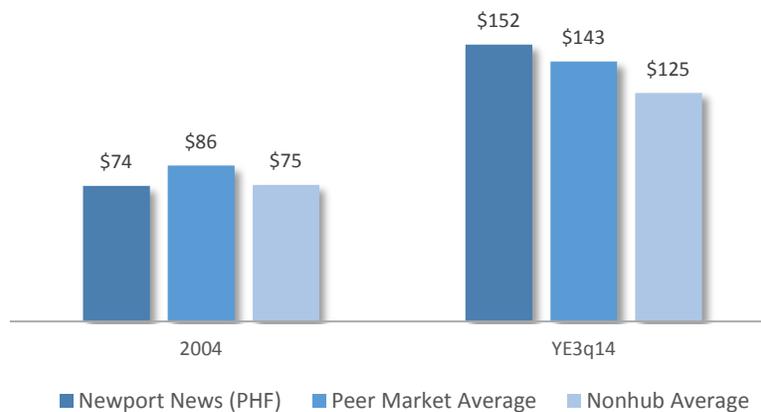
**Exhibit 3-42: Average O&D Passengers per Seat at Newport News - Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

In addition, O&D revenue per seat in Newport News has increased significantly in the midst of capacity reductions. While Newport News’ peer airports exceeded it in terms of O&D revenue per seat in 2004, by 2014 Newport News’ revenue per seat figure exceeded not only its peers, but also the Non Hub average. Since revenue per seat is a key metric in the selection of new destinations by airlines, this increase could be a welcome trend for Newport News.

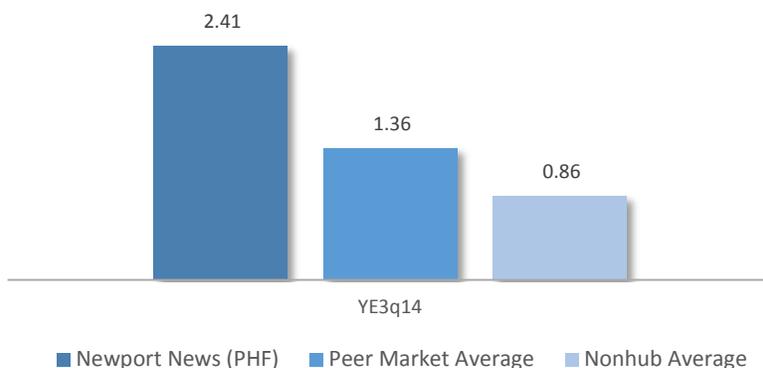
**Exhibit 3-43: Average O&D Revenue per Seat at Newport News – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

Another welcome trend for Newport News is that its O&D traffic per capita—also known as propensity to travel—was significantly stronger than both its peer markets and the Non Hub average. This suggests that, relative to its size, the Newport News area generates a greater-than-average number of trips compared to its peers. As shown in Exhibit 3-44, Newport News residents generated an average of 2.4 O&D passengers per capita in the year ended 3Q 2014, compared to just 1.4 for its peer markets and 0.9 for all Non-Hubs.

**Exhibit 3-44: Average O&D Traffic per Capita for Newport News – Domestic**

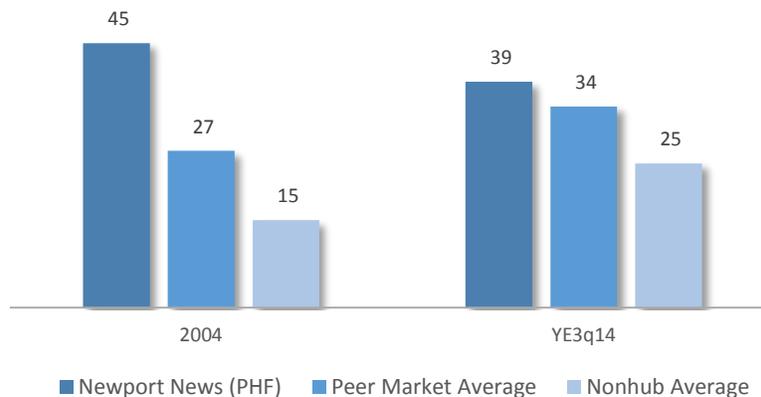


Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

On a per-flight basis, Newport News showed the opposite trend in O&D traffic compared to its traffic on a per-seat basis. While per-seat traffic increased 15 percent from 2004 to 2014, O&D traffic per flight at Newport News decreased by 15 percent over the same period. This makes sense considering the decrease in average seats per departure at Newport News—as seats per

departure shrink, we would expect to see fewer passengers on a given flight. Even with this decrease, the number of passengers per flight at Newport News still exceeds both its peers and the Non-Hub average.

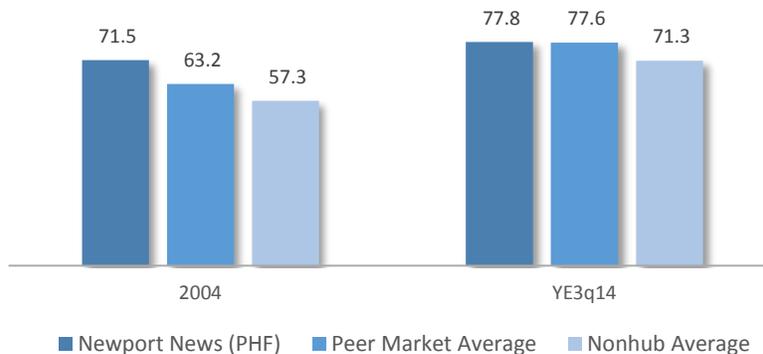
**Exhibit 3-45: Average O&D Traffic per Flight for Newport News – Domestic**



Source: US DOT, DB1B database, Innovata schedules, via Diio online portal. InterVISTAS analysis.

As long as the decrease in seats per departure exceeds any change in passenger traffic, we would expect to see average load factors at Newport News increase, as they have throughout the industry in the past ten years. Indeed, Exhibit 3-46 shows that average load factors at Newport News increased from 71.5 percent in 2004 to 77.8 percent in 2014. While Newport News’ load factors exceeded its peers in both time periods, peer load factors increased at a much faster rate than did load factors at Newport News. While Newport News’ average load factors exceeded its peers by 8.3 percentage points in 2004, by 2014 this gap had shrunk to just 0.2 percentage points. It should be noted that sequestration has had a damaging effect on the Hampton Roads region. Military personnel and supporting businesses/contractors are not spending or traveling at the rate prior to sequestration. However, both Newport News and its peers exceed the Non Hub average in terms of load factors.

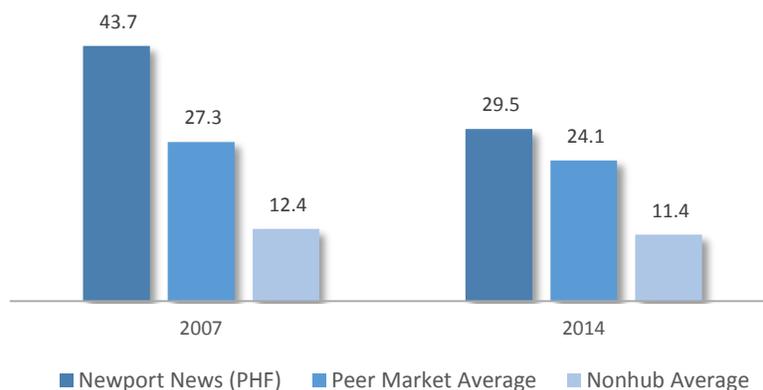
**Exhibit 3-46: Average Load Factors at Newport News – Domestic**



Source: US DOT T-100 database, via Diio online portal.

While Newport News outperformed its peers in many of these service categories, one service trend where the airport struggled over the last decade is its connectivity to the national and global air transportation network. As a result of the loss of AirTran Airways service, Newport News’ ACQI connectivity score decreased 32 percent from 2007 to 2014. In comparison, its peers’ average connectivity score decreased by just 12 percent. This is understandable considering the loss of service at Newport News and the fact that much of the replacement service for previous AirTran flights has come through ultra-low-cost carriers like Allegiant Air, which operate mostly point-to-point flights with limited connecting opportunities.

**Exhibit 3-47: MIT ACQI Connectivity Score for Newport News**



Source: Massachusetts Institute of Technology Airport Connectivity Quality Index.

## 2.10 Norfolk International Airport (ORF)

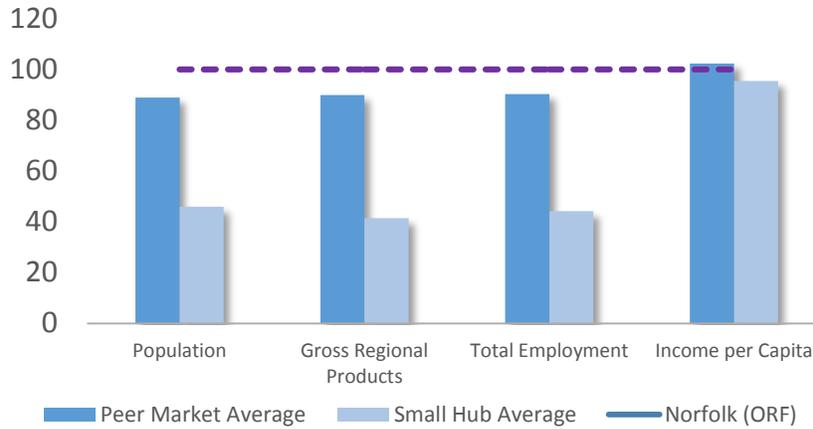
Norfolk, a Small Hub airport located in a fairly large metropolitan region of over 1.5 million people, was compared to a mixed basket of Medium Hub and Small Hub peers. As shown in Exhibit 3-49, Norfolk exceeded its peers in most demographic categories, and its income per capita was fairly in line with its peer averages. **It should be noted that while Norfolk exceeds its peers in most categories, the population and employment of the MSA is defense-intensive and therefore subject to mass deployments, cutbacks and employment shifts that in turn impact its overall performance.** In turn, the basket of peers greatly exceeded the averages for all Small Hubs, suggesting that the Norfolk region is economically stronger than most other Small Hubs. In addition, and with rare exception, Norfolk's peers have alternative airport choices within a reasonable driving distance.

Despite having a population and total employment roughly 10 percent superior to those of comparable Small Hubs, Norfolk has similar income per capita to comparable Small Hubs. It is important to note that U.S. Small Hubs are on average home to half the population of Norfolk, with similar income per capita figures. Such Small Hubs present comparable wealth per capita with fewer residents than Norfolk and its peer markets, as shown on exhibit 3-49.

### Exhibit 3-48: Peer Markets for Benchmarking – Norfolk



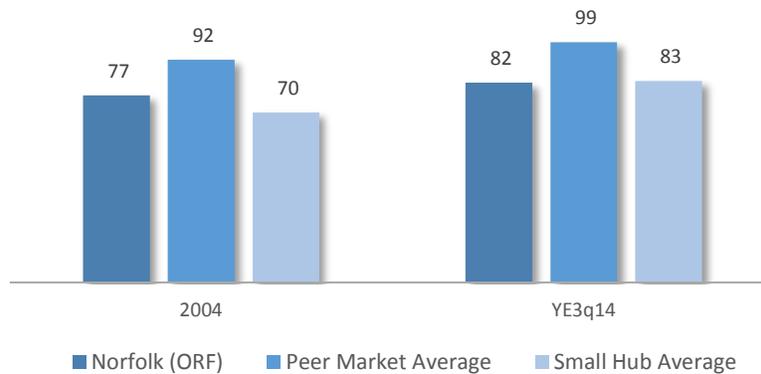
**Exhibit 3-49: Norfolk Compared with Peer Market and Average in Key Demographic & Economic Indicators (Index: Norfolk=100)**



Source: Woods & Poole Economics 2014. InterVISTAS analysis.

The aircraft up-gauging trend in the U.S. is visible at Norfolk, as shown in exhibit 3-50. The pace at which the average number of seats per departure is increasing is slower than at other airports; it has grown 0.7 percent per year through the last decade, 0.8 percent at peer markets and a more robust 1.9 percent in Small Hubs. In Norfolk’s case, this slower than usual pace is explained by post-merger Southwest terminating services to Atlanta, Jacksonville and Nashville, and American Airlines’ new service to LaGuardia. While Southwest is terminating service with sizeable narrow-body 737s, American is introducing regional jet/turboprop service, putting downward pressure on the average aircraft size.

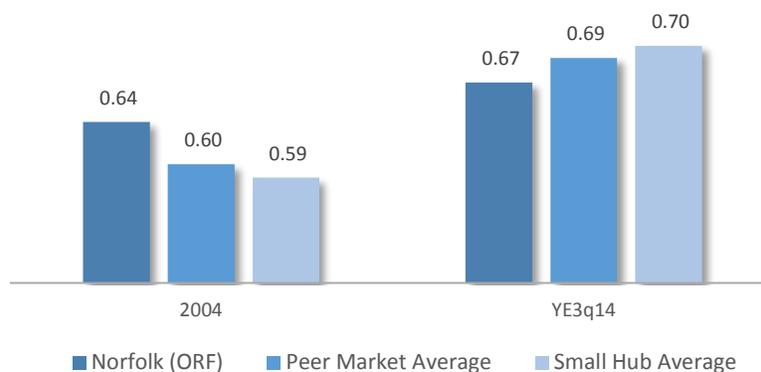
**Exhibit 3-50: Average Seats per Departure at Norfolk – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

Though the number of O&D passengers has grown slightly over the last decade at Norfolk, both peer markets and other Small Hubs have experienced much faster growth; 1.9 percent per year at Small Hubs compared to only 0.5 percent per year at Norfolk. The latter is not generating as much demand for every available seat, as its 2014 performance is below that of peer markets and fellow Small Hubs. The airport experienced a 28 percent cut in capacity between 2004 and 2014, with a 24 percent decrease in O&D traffic. By comparison, peer markets have experienced a 20 percent decrease in capacity and an 8 percent drop in O&D traffic.

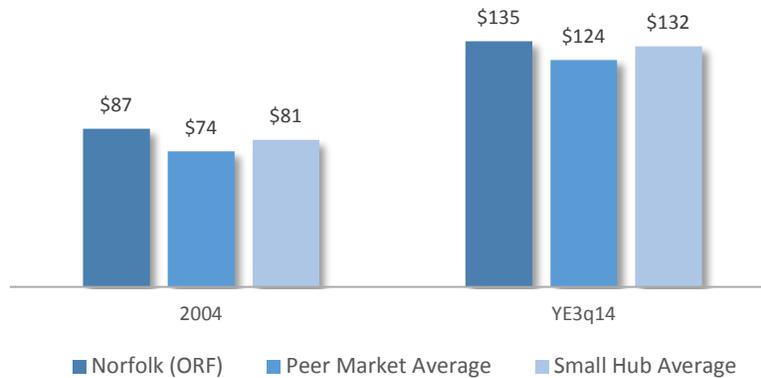
**Exhibit 3-51: Average O&D Traffic per Seat at Norfolk – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

Though Norfolk’s traffic per seat is below that of peer markets, its revenue per seat is higher. Norfolk has consistently generated more revenue per seat than its peer markets and other U.S. small hubs other the past decade, as shown on Exhibit 3-52. The revenue growth rates are comparable across all cities. This indicator has almost doubled over the past ten years, due to capacity cuts and robust demand.

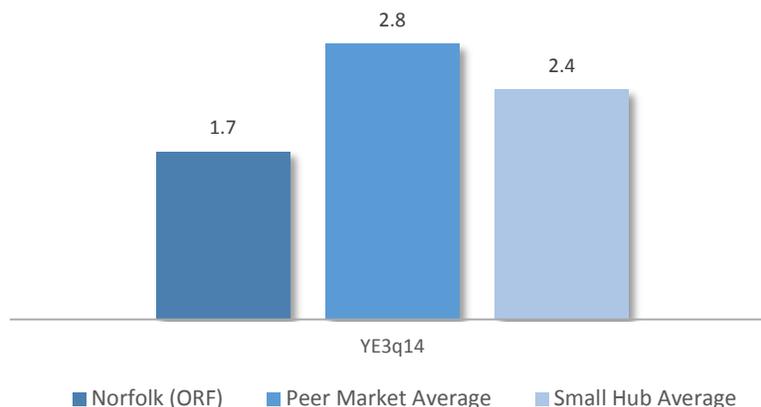
**Exhibit 3-52: Average O&D Revenue per Seat at Norfolk – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

With comparable population, employment and GDP per capita, Norfolk generates little more than half of the traffic per capita that its peer markets generate. The city is not served by an ultra-low cost carrier, unlike many of the peer markets, and Southwest Airlines pulled out of several markets from Norfolk. Newport News’ close location to Norfolk may explain some of this trend.

**Exhibit 3-53: Average O&D Traffic per Capita at Norfolk – Domestic**

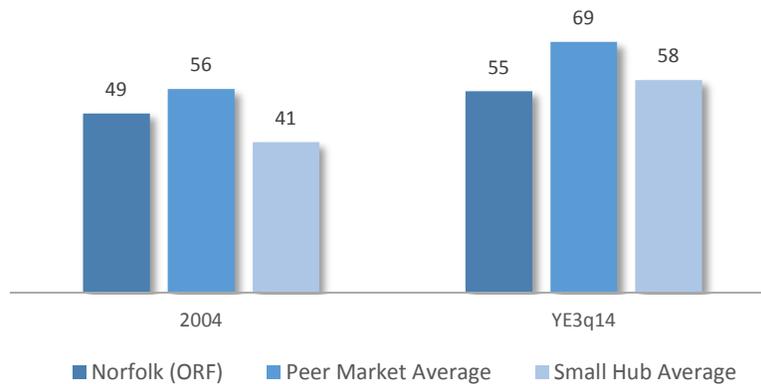


Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

Consistently with the aircraft up-gauging trend in the U.S., each flight out of Norfolk generates more traffic and per-flight capacity is, on average, increasing. Similar to the average number of seats per flight, this trend has been less fast-paced at Norfolk. There were on average 1.3 percent more passengers per year on each flight out of Norfolk between 2004 and 2014, compared to 2.4 percent for peer markets and 3.9 percent for Small Hubs. For 2014 versus 2004, Norfolk lost 33 percent of its flights, and peer markets lost about 29 percent on average. However, during the

same period, O&D levels at Norfolk dropped by more than 24 percent, and the overall peer market average is down by 9 percent.

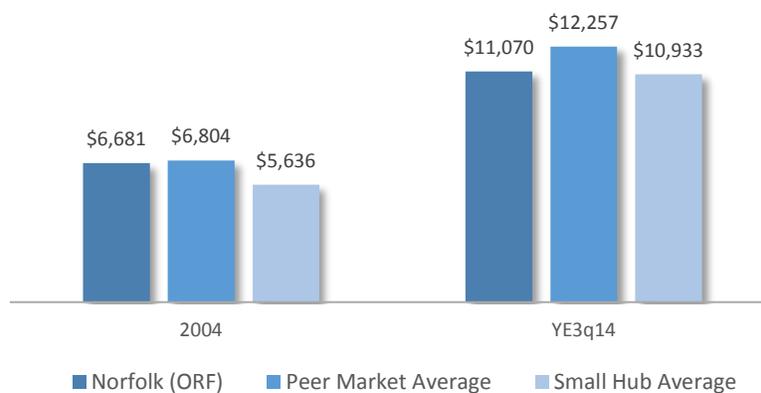
**Exhibit 3-54: Average O&D Traffic per Flight at Norfolk – Domestic**



Source: US DOT, DB1B database, Innovata schedules, via Diio online portal. InterVISTAS analysis.

Average O&D revenue per flight has increased since 2004 due to reduced operations, aircraft up-gauging and higher fares, as shown on exhibit 3-55. This ratio directly ties to the average O&D traffic per flight. The gap between Norfolk and its peer markets as well as the overall Small Hubs is smaller here due to higher O&D fare and little low cost presence. Norfolk has generally followed the similar trend, along with all the peer markets and Small Hubs, with average yearly growth rates of 5.8 percent, 6.8 percent, and seven percent between 2004 and 2014. Norfolk average revenue per flight is below that of most peer markets.

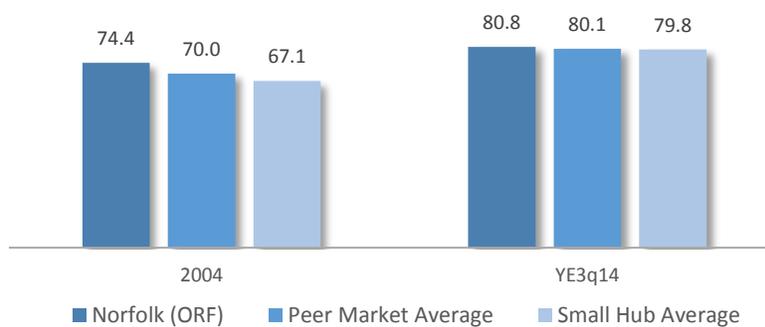
**Exhibit 3-55: Average Revenue per Flight at Norfolk – Domestic**



Source: US DOT, DB1B database, Innovata schedules, via Diio online portal. InterVISTAS analysis.

From 2004 to 2014, overall capacity and enplanements have been reduced. Load factors have improved as the number of enplanements decreased slower than capacity. This is a nationwide trend, reflecting the industry’s capacity discipline; aircraft are, on average, fuller as major U.S. legacy carriers maintain flat capacity as traffic increases. Norfolk is still performing slightly better than most of its peer markets, though load factors have been increasing at a faster pace at peer markets and Small Hubs. It should be noted that sequestration has had a damaging effect on the Hampton Roads region. Military personnel and supporting contractors/businesses are not spending or traveling at the rate prior to sequestration.

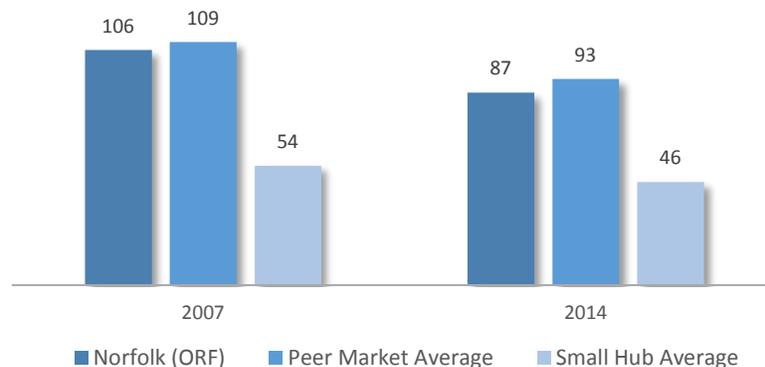
**Exhibit 3-56: Average Load Factor at Norfolk -- Domestic**



Source: US DOT T-100 database, via Diio online portal.

Norfolk presents a lower connectivity index than most of its peer markets, considering it has similar demographics. It is, however, well-connected to U.S. hubs in the Eastern half of the country. Flights towards hubs contribute to connectivity to a greater extent than those operated by point-to-point low cost carriers; over the last decade, air service at Norfolk has been focused on the former rather than the latter.

**Exhibit 3-57: ACQI Connectivity Index – Norfolk**



Source: Massachusetts Institute of Technology Airport Connectivity Quality Index.

## 2.11 Richmond International Airport (RIC)

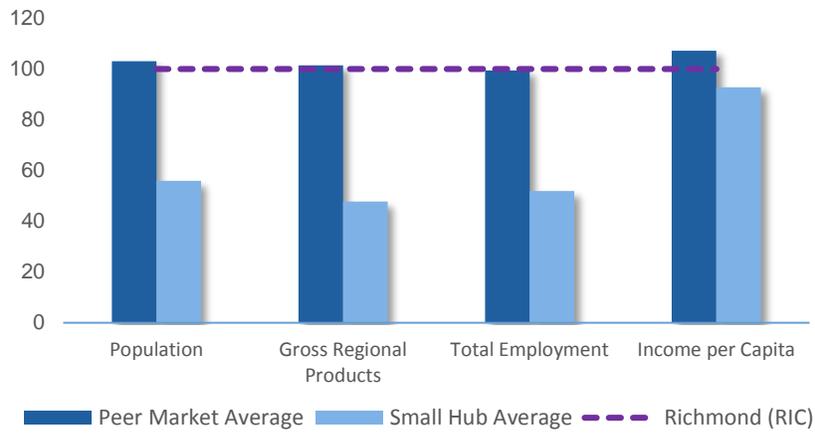
As one of the larger Small Hub airports by passenger traffic, Richmond's set of peer airports contains a variety of Medium Hub and Small Hub airports located in mid-sized metropolitan regions in the United States, as shown in Exhibit 3-58.

### Exhibit 3-58: Peer Markets for Benchmarking – Richmond



As Richmond peers are generally larger airports than Small Hubs as a whole, Richmond and its peers both compare favorably to Small Hub airport averages. Richmond and its peers have population, gross regional products, and total employment figures that are roughly double that of the Small Hub average. Richmond itself is fairly comparable to its peers in population, GRP, and employment, although the income per capita of Richmond's peers is slightly higher than Richmond itself.

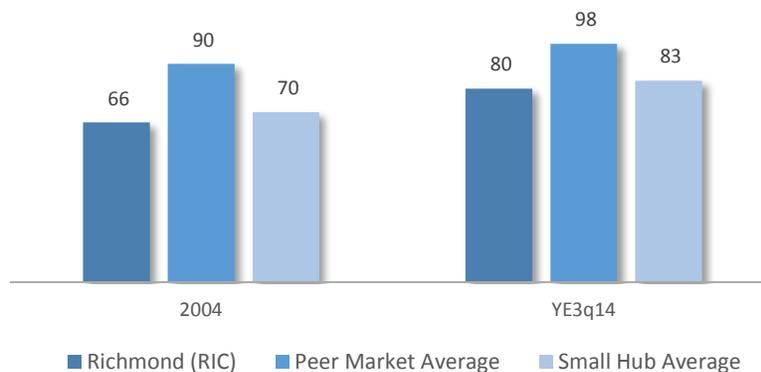
**Exhibit 3-59: Richmond Compared with Peer Market and Average in Key Demographic & Economic Indicators (Index: Richmond=100)**



Source: Woods & Poole Economics 2014. InterVISTAS analysis.

As a Small Hub airport with a significant proportion of regional jet service, Richmond and its peers have both seen seats per departure increase as a function of the national up-gauging trend of the past decade. Seats per departure at Richmond increased from 66 in 2004 to 80 in 2014. Richmond’s seats per departure were below the average of its peers in each of these years, suggesting that further up-gauging may be possible for Richmond in the next few years.

**Exhibit 3-60: Average Seats per Departure at Richmond – Domestic**

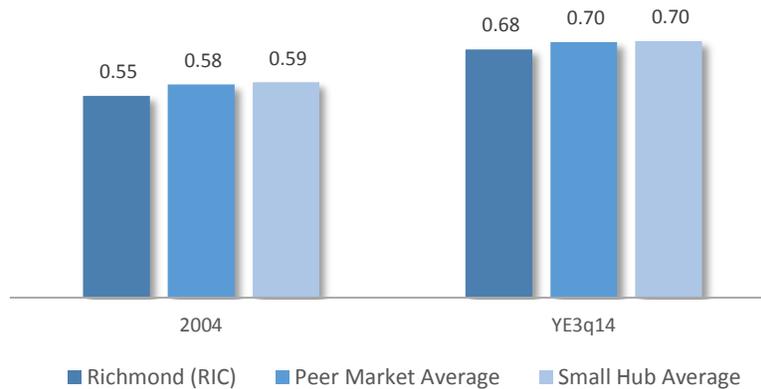


Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

Richmond has also kept pace with its peers and the Small Hub average in terms of O&D passengers per seat. Richmond was within 0.02 passengers per seat of its peers and the Small

Hub average in 2014; furthermore, Richmond’s peers were fairly representative of the Small Hub airport average with 0.70 O&D passengers per available seat.

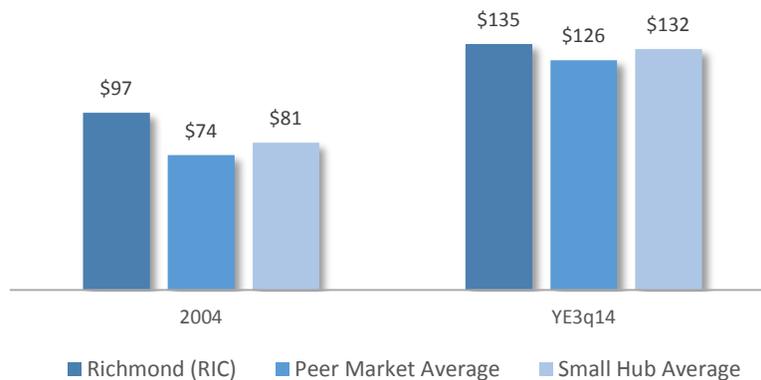
**Exhibit 3-61: Average O&D Traffic per Seat at Richmond – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

Average O&D revenue per seat is one metric for which Richmond sees an advantage over its peers. Richmond’s O&D revenue per seat in 2014 was \$135, compared to \$126 for its peers and \$132 for Small Hubs on average. Among its ten peer airports, Richmond ranks third behind Westchester County and Hartford for revenue per seat—two markets with significantly higher household incomes than Richmond. This speaks to Richmond’s strong business travel market that can command slightly higher fares than some comparable airports.

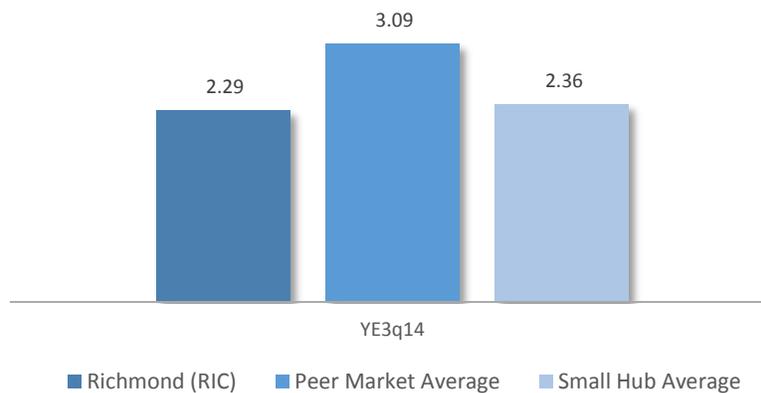
**Exhibit 3-62: Average O&D Revenue per Seat at Richmond – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

Yet while Richmond’s average O&D revenue per seat exceeded its peer average, the airport ranked lower than its peers in terms of O&D traffic per capita. The Richmond area generated 2.3 trips per capita in 2014, compared to 3.1 trips among its 10 peer airports on average. However, Richmond’s propensity to travel was largely in line with the Small Hub average of 2.4 passengers per capita, as shown in Exhibit 3-63.

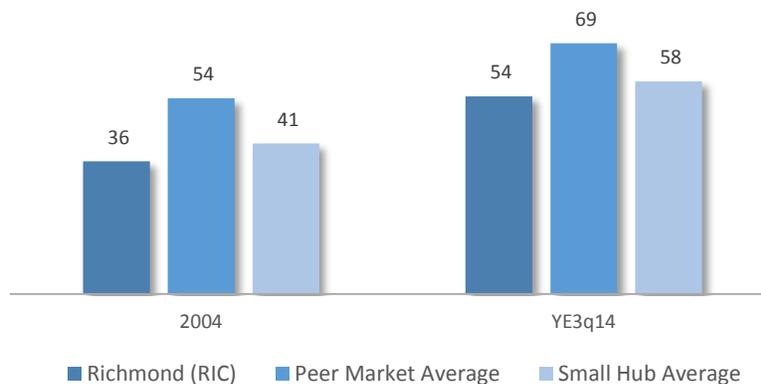
**Exhibit 3-63: O&D Passengers per Capita at Richmond – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

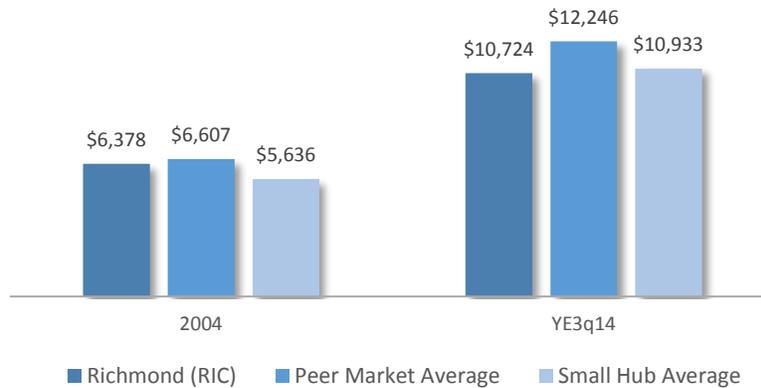
Considering that Richmond had fewer seats per departure than its peers, it is not surprising that its O&D passengers and revenue per flight were also lower than its peers. However, while both O&D traffic per flight and O&D revenue per flight were lower than Richmond’s peers and the Small Hub average in 2004 and 2014, both of these metrics have increased over the years as seats per departure at the airport increased.

**Exhibit 3-64: Average O&D Traffic per Flight at Richmond – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

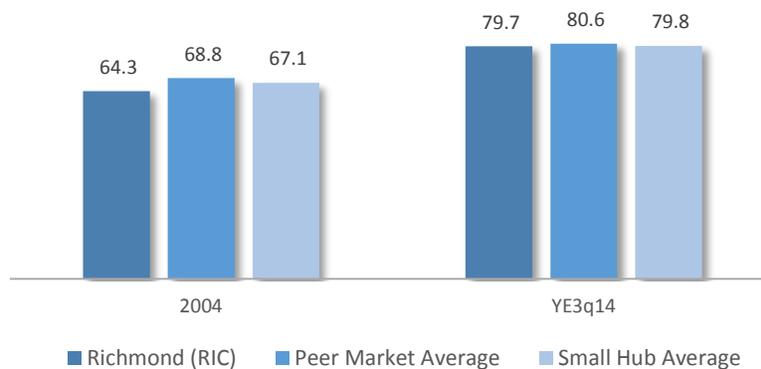
**Exhibit 3-65: Average O&D Revenue per Flight at Richmond – Domestic**



Source: US DOT, DB1B database, Innovata schedules, via Diio online portal. InterVISTAS analysis.

Richmond also performs on par with its peers in terms of load factors. Average load factors at Richmond increased from 64.3 percent in 2004 to 79.7 percent in 2014, in concert with an overall increase in load factors throughout the industry. In addition, in 2014, Richmond’s load factors were within one percentage point of its peers, and roughly on par with the Small Hub average, as shown in Exhibit 3-66.

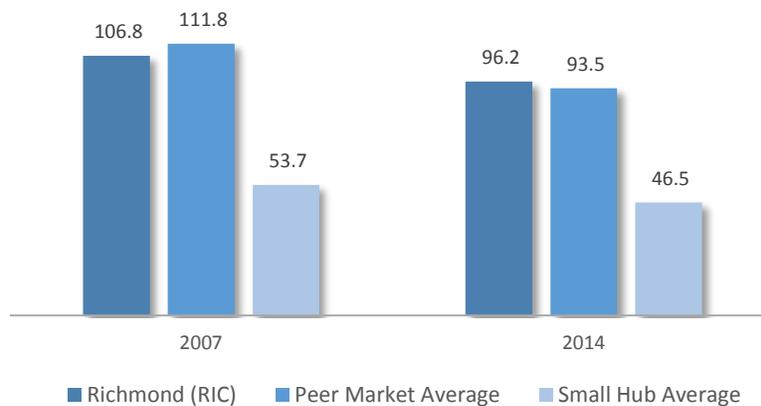
**Exhibit 3-66: Average Load Factors at Richmond – Domestic**



Source: US DOT T-100 database, via Diio online portal.

Finally, as one of the larger Small Hub airports with a variety of connecting service, Richmond and its peers are relatively well connected. As shown in Exhibit 3-67, Richmond’s ACQI connectivity score now exceeds its peer average, and is over double that of Small Hub airports overall. This indicates that Richmond is well-connected to the national air transportation system relative to its peers.

**Exhibit 3-67: MIT ACQI Connectivity Score for Richmond**



Source: Massachusetts Institute of Technology Airport Connectivity Quality Index.

Given that Richmond’s peer category includes some Medium Hub airports, Richmond’s performance relative to its peers shows its relative strength among Small Hub airports. Richmond’s passenger traffic and revenue ranks the airport among some Medium Hub airports in terms of performance, and its connectivity was stronger than the Small Hub average. Richmond was the fourth largest Small Hub airport in 2013, and could potentially move up into the Medium Hub category in the coming years if passenger numbers grow.

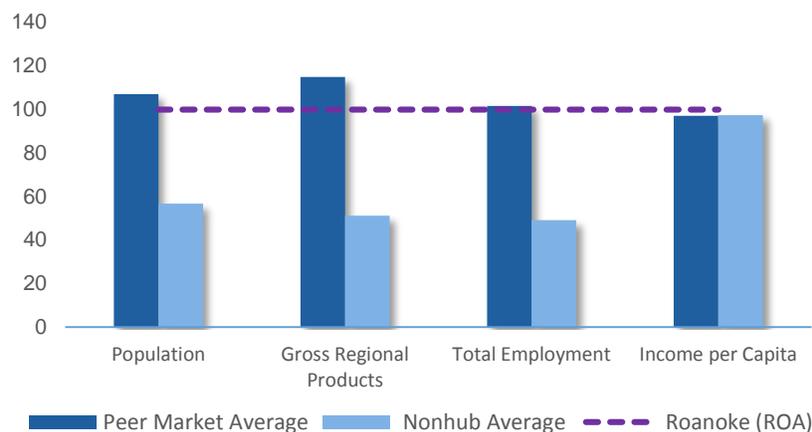
**2.12 Roanoke-Blacksburg International Airport (ROA)**

As one of the 20 largest Non-Hub airports by passengers enplaned in 2013, Roanoke’s list of peer airports, shown in Exhibit 3-68, includes many of the largest Non-Hub airports, and even a few Small Hub airports such as Sioux Falls, SD, and Eugene, OR. As a result, both Roanoke and its peer airports rank far above the Non-Hub average in terms of population, GRP, and total employment, whereas the Non-Hub average income per capita is roughly on par with both Roanoke and its peers.

**Exhibit 3-68: Peer Markets for Benchmarking – Roanoke**



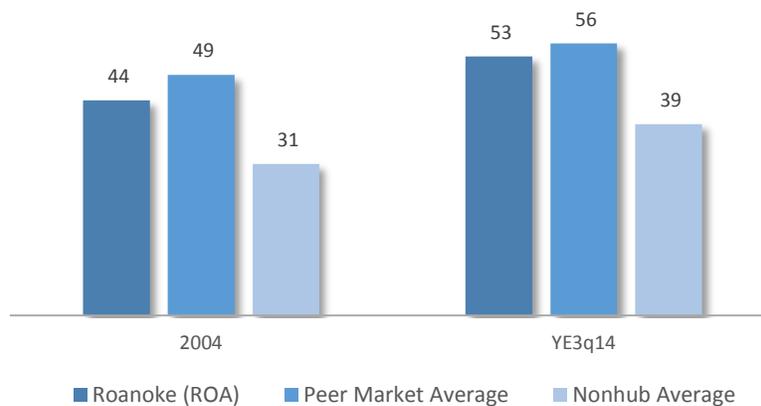
**Exhibit 3-69: Roanoke Compared with Peer Market and Average in Key Demographic & Economic Indicators (Index: Roanoke=100)**



Source: Woods & Poole Economics 2014. InterVISTAS analysis.

As discussed in Chapter 1, many of Roanoke’s departures are still operated with 37-50 seat regional jet equipment. As such, while Roanoke’s seats per departure have increased from 2004 to 2014 in line with industry trends, they have still not reached the peer market average, as shown in Exhibit 3-70. However, seats per departure at both peer markets and Roanoke itself both exceed the Non-Hub average.

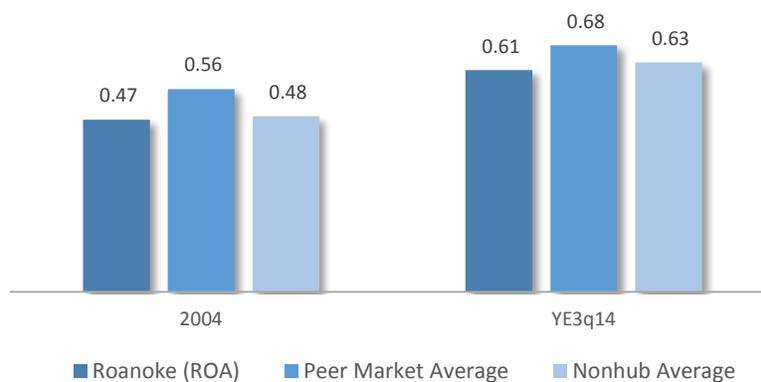
**Exhibit 3-70: Average Seats per Departure at Roanoke – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

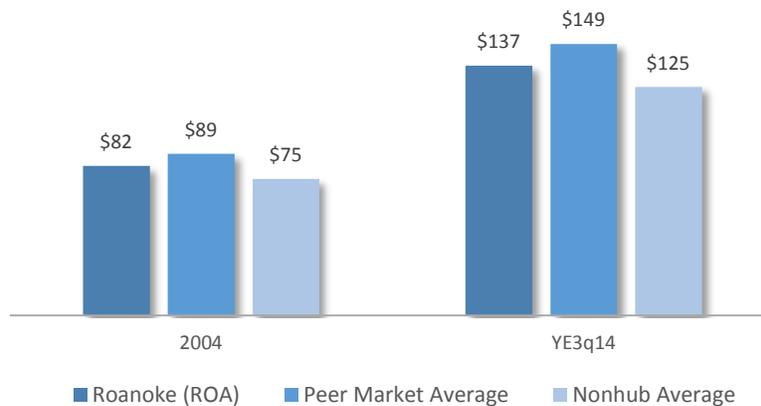
Roanoke’s O&D traffic per seat is slightly lower than both its peers and the Non-Hub average, as shown in Exhibit 3-71. However, the 0.14 passenger per seat increase in traffic at Roanoke between 2004 and 2014 was slightly higher than the average of its peers, which increased by 0.12 passengers per seat over the same time. Additionally, as shown in Exhibit 3-72, O&D revenue per seat at Roanoke exceeds the Non-Hub average, but falls slightly short of its peers.

**Exhibit 3-71: Average O&D Passengers per Seat at Roanoke – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

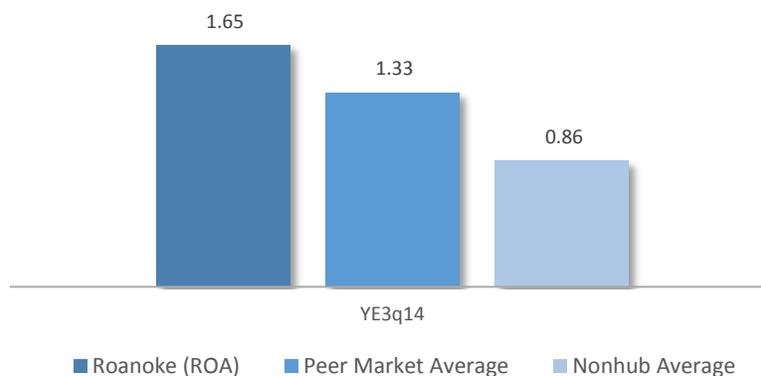
**Exhibit 3-72: Average O&D Revenue per Seat at Roanoke – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

Roanoke outperforms its peers and the Non-Hub average in terms of average O&D traffic per capita. As shown in Exhibit 3-73, Roanoke generated an average of 1.7 passenger trips per capita in 2014, compared to 1.3 passengers per capita among its peers and 0.9 amongst Non-Hubs on average. Roanoke ranked fourth out of its peers in terms of propensity to travel, behind only Sioux Falls, Eugene, and South Bend—each of which are Small Hub airports.

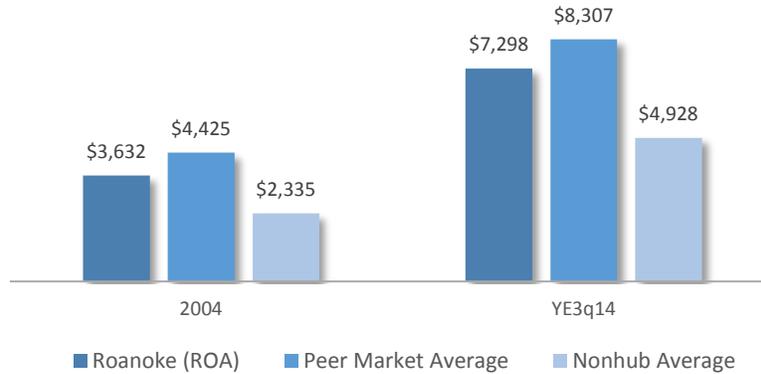
**Exhibit 3-73: Average O&D Passenger Traffic per Capita at Roanoke – Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

On a per-flight basis, Roanoke outperforms the Non-Hub average in terms of O&D revenue, even though it underperformed all Non-Hubs in terms of revenue per seat. This suggests that Roanoke’s average aircraft size is larger than Non-Hubs as a whole. However, in both 2004 and 2014, Roanoke’s peer markets outperformed Roanoke itself in terms of both revenue per flight and revenue per seat.

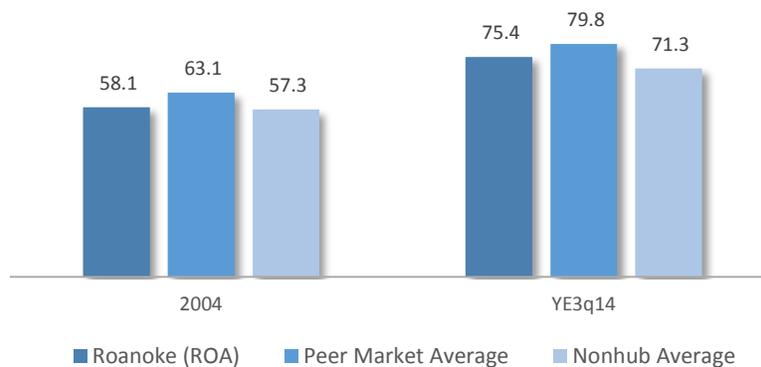
**Exhibit 3-74: Average O&D Revenue per Flight at Roanoke – Domestic**



Source: US DOT, DB1B database, Innovata schedules, via Diio online portal. InterVISTAS analysis

Roanoke’s load factors have improved significantly since 2004, as shown in Exhibit 3-75. In 2004, Roanoke’s average load factor was 58.1 percent; this has improved over the last ten years to 75.4 percent. Roanoke’s load factor also exceeded the Non-Hub average in each of those years. However, the airport’s load factor was 4.5 percentage points lower than the average of its peers in 2014.

**Exhibit 3-75: Average Load Factors at Roanoke – Domestic**

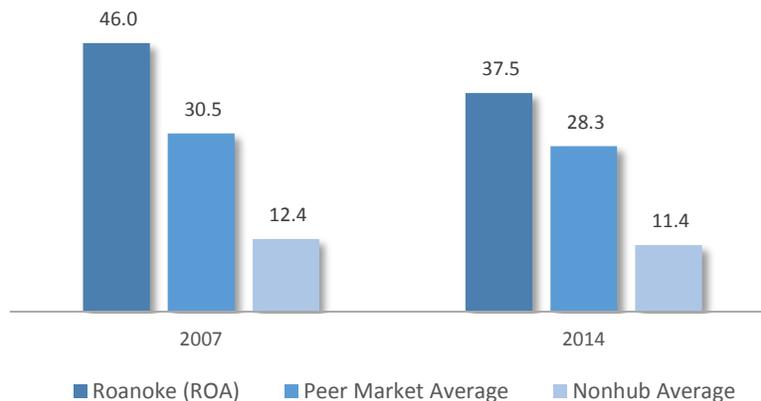


Source: US DOT T-100 database, via Diio online portal.

Finally, one characteristic in which Roanoke outshines its peers is connectivity. Roanoke remains well connected to the national air transportation system relative to its peers. Roanoke’s ACQI score of 37.5 in 2014 outpaced its peers’ average of 28.3, and was over triple the Non-Hub average of 11.4. Although connectivity has declined at Roanoke over the last seven years, it still

remains better connected than a majority of its peers, which also saw connectivity fall over those years.

**Exhibit 3-76: MIT ACQI Connectivity Score for Roanoke**



Source: Massachusetts Institute of Technology Airport Connectivity Quality Index.

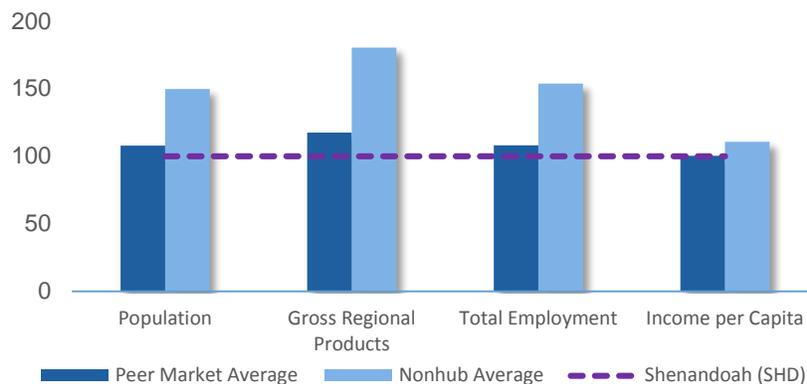
## 2.13 Shenandoah Valley Regional Airport (SHD)

As mentioned in Chapter 1, Shenandoah Valley Regional Airport is the only Virginia airport at which commercial air service is supported by the Essential Air Service program—a federal subsidy program that provides funding for flights from small communities to nearby Medium Hub and Large Hub airports. While Shenandoah Valley’s peer airports were selected primarily on the basis of their demographic and economic characteristics, a number of its peers are also EAS communities, as shown in Exhibit 3-77. Specifically, as of April 2015, each of Shenandoah Valley’s peer airports with the exception of St. George, Utah; San Angelo, TX; and Williamsport, PA were supported by EAS funding.

**Exhibit 3-77: Peer Markets for Benchmarking – Shenandoah Valley**



**Exhibit 3-78: Shenandoah Valley Compared with Peer Market and Average in Key Demographic & Economic Indicators (Index: Shenandoah Valley=100)**



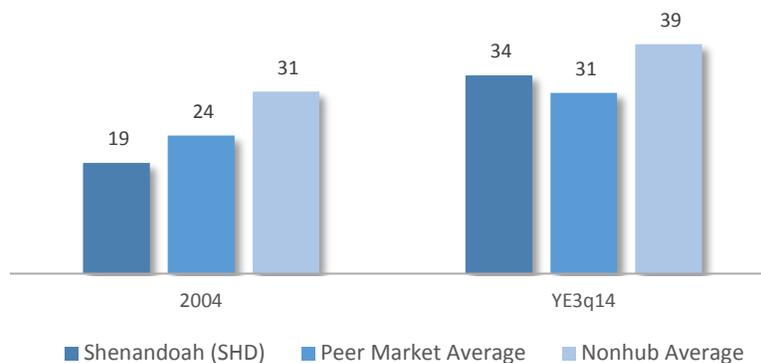
Source: Woods & Poole Economics 2014. InterVISTAS analysis.

As shown in Exhibit 3-78, Shenandoah Valley compares fairly similarly to its peers in terms of economic and demographic characteristics, although peer airports’ GRP and total employment ranked slightly higher than Shenandoah Valley. However, both Shenandoah Valley and its peers ranked below the Non-Hub average in each of the four economic and demographic selection criteria. This could be expected due to the prevalence of smaller, EAS markets in Shenandoah Valley’s set of peers, compared with relatively larger markets in the Non-Hub category as a whole.

As an EAS airport, it is reasonable to expect Shenandoah Valley and its peers to have generally smaller aircraft sizes and fewer passengers per departure than other Non-Hub airports. Indeed, as

shown in Exhibit 3-79, seats per departure at Shenandoah Valley and its peer airports both ranked below the Non-Hub average in 2004 and 2014. However, in 2014, Shenandoah Valley’s average aircraft size had increased, and it had exceeded its peer airports in terms of seats per departure.

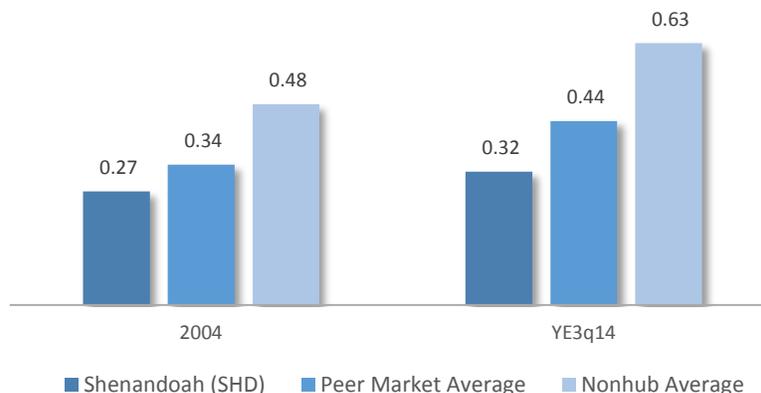
**Exhibit 3-79: Average Seats per Departure at Shenandoah Valley -- Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

While Shenandoah Valley’s aircraft are slightly larger than its peers, its level of O&D traffic relative to seats was lower than its peers, as shown in Exhibit 3-80. Average O&D passengers per seat increased only slightly at Shenandoah Valley from 2004 to 2014, from 0.27 to 0.32. This ranks below its peer airports at 0.34 in 2004 and 0.44 in 2014, and was nearly half of the Non-Hub airport average in 2014. This value is also far below many larger Small Hub and Medium Hub airports.

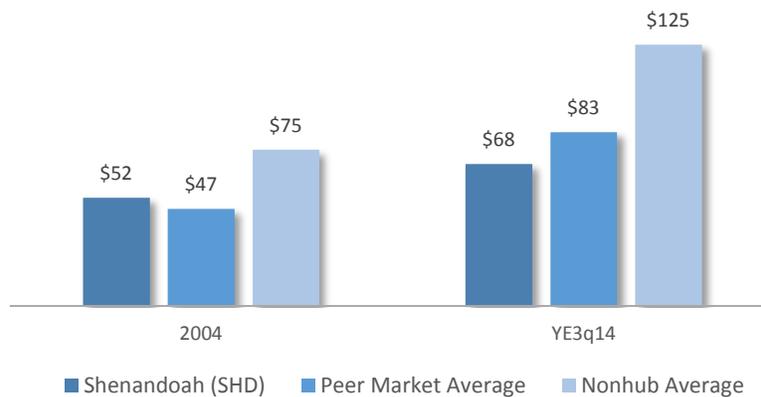
**Exhibit 3-80: Average O&D Traffic per Seat at Shenandoah Valley -- Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

Due to its smaller number of passengers than many Non-Hub airports, Shenandoah Valley’s revenue per available seat ranks lower than its peers and is nearly half of the Non-Hub average. It is important to note that this revenue value only includes passenger fares; any additional subsidies from the EAS program are paid directly from the federal government to the airlines and are not included in Exhibit 3-81.

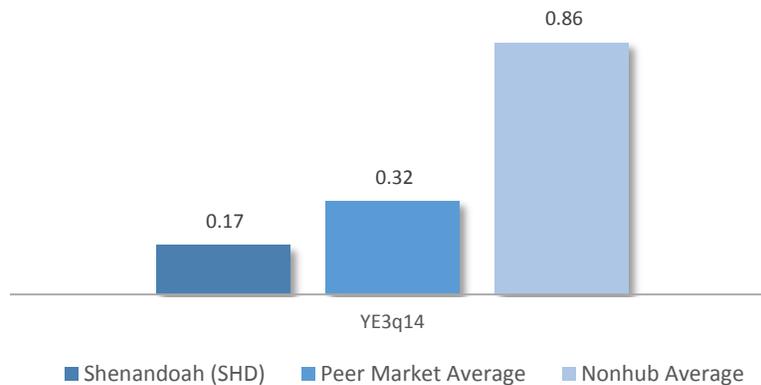
**Exhibit 3-81: Average O&D Revenue per Seat at Shenandoah Valley -- Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

Like many EAS markets, whose passengers are likely to drive to a nearby Medium Hub or Large Hub airport to reach a wider range of nonstop flights, Shenandoah Valley’s passengers per capita are low compared to national averages. The Shenandoah Valley region generated 0.17 O&D passengers per capita, compared to a large hub average of 0.86. While Shenandoah Valley ranked below its peers in this category, its EAS peers generated between 0.01 and 0.37 O&D passengers per capita; similar to Shenandoah Valley’s levels.

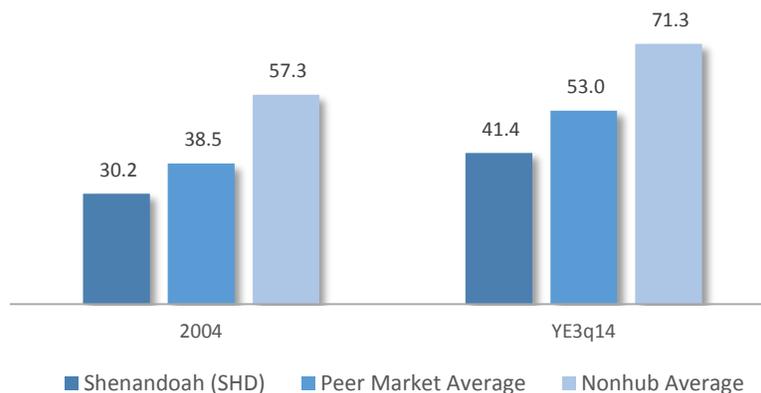
**Exhibit 3-82: Average O&D Traffic per Capita at Shenandoah Valley -- Domestic**



Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

Many EAS communities struggle to generate enough passenger traffic to adequately support the service. As a result, EAS airport load factors are generally less than other non-subsidized airports. As a case in point, Shenandoah Valley’s load factor in the year ended 3Q 2014 was 41.4 percent, as shown in Exhibit 3-83, compared to a 53 average load factor among its peers and a 71.3 average among Non-Hubs as a whole. While Shenandoah Valley ranked lower than its peers in terms of average load factor, it did not have the lowest load factor amongst its peers—Beckley, WV filled only 21.3 percent of its seats in 2014, while Kingman, AZ’s average load factor in that year was just 18.6 percent.

**Exhibit 3-83: Average Load Factors at Shenandoah Valley – Domestic**

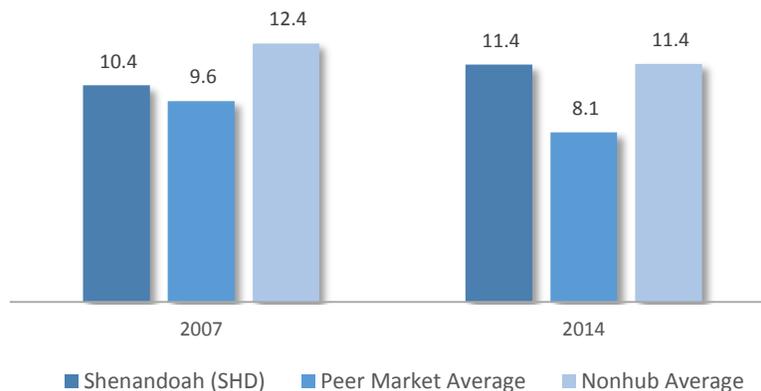


Source: US DOT, DB1B database, via Diio online portal; Woods & Poole Economics 2014; InterVISTAS analysis.

A new rule implemented in 2014 put a cap on the maximum EAS subsidy that is allowed per passenger at an airport. Airports at which subsidy values exceed \$1,000 per passenger face

potential removal from the EAS program and, as a result, a discontinuation of all commercial air service from the airport. As an example, Kingman, AZ, whose 18 percent load factors led to its subsidy levels per passenger exceeding \$1,500 in 2014, saw a termination in its EAS funding and a discontinuation of all flights as of April 30, 2015.<sup>7</sup> While Shenandoah Valley has load factors that are double Kingman’s, such a fate is important to keep in mind when developing strategies to attract more passengers to fly from Virginia’s smaller airports.

**Exhibit 3-84: MIT ACQI Connectivity Score for Shenandoah Valley**



Source: Massachusetts Institute of Technology Airport Connectivity Quality Index.

The purpose of the EAS program is to better connect smaller communities to the national air transportation system. As a result, EAS airports always serve a nearby Medium Hub or Large Hub airport, and as a result are relatively well connected to the world. As shown in Exhibit 3-84, Shenandoah Valley’s ACQI connectivity score exceeded its peer average in both 2007 and 2014, and was exactly on par with the Non-Hub average in 2014. Therefore, while EAS airports often rank lower than other Non-Hubs in terms of passenger traffic and load factors, they serve their goals well of connecting small community residents to the global air transportation network.

<sup>7</sup> Smith, H.R. 2015. “Kingman’s passenger air service ending April 30.” Daily Miner 26 March 2015. <http://kadminer.com/main.asp?SectionID=1&SubSectionID=1&ArticleID=65331>

## Conclusions and Outcomes of Benchmarking Exercise

Now that the benchmarking of each of the Commonwealth’s primary commercial service airports has been completed, attention can turn to the overall trends that the benchmarking reveals. In other words, do Virginia’s primary commercial service airports generally outperform or underperform their peers in each of the selected air service characteristics described in Sections 2 and 3?

Exhibit 4-1 summarizes the results of the benchmarking analysis. The exhibit shows the number of Virginia primary commercial service airports that outperformed their group of ten peer airports in the benchmarking analysis completed in Section 3, as well as the number of airports that underperformed their peers.

Note that “underperformance” is not necessarily a strict negative—for instance, O&D revenue per flight is closely related to the number of seats per departure at an airport. If an airport’s peers had greater seats per departure than the airport itself, the peers’ average O&D revenue per flight is also likely to be higher. This is not a demerit on the airport in question; instead, it simply shows that the service patterns at that airport are different from its peers.

**Exhibit 4-1: Summary of Virginia Primary Commercial Service Airport Performance in the Peer Benchmarking Analysis in the Year Ended 3Q 2014**

Characteristic	Outperformed Peers	Underperformed Peers
Seats per Departure	2	7
O&D Traffic per Seat	3	6
O&D Revenue per Seat	6	3
O&D Traffic per Capita	3	6
O&D Traffic per Flight	2	7
O&D Revenue per Flight	3	6
Average Load Factor	4	5
ACQI Connectivity Score	5	4

As Exhibit 4-1 shows, a majority of Virginia’s primary commercial service airports outperformed their peers in only two of the eight service characteristic categories: O&D revenue per seat, and ACQI connectivity score. In all other service characteristic categories, a majority of Virginia airports underperformed their peers.

There are a number of factors that could have led to this overall trend of underperformance relative to peers. First, note that most Virginia airports underperformed their peers in seats per departure. That is, on average, Virginia airports are more likely to have smaller aircraft operating domestic departures than their peers. This aligns with the Commonwealth-wide trends discussed in Chapter 1, where Virginia was found to still rely heavily on smaller regional jets for domestic service.

As a result of a lower seats per departure figure than peer airports, Virginia's airports are also more likely to underperform on several related categories. For instance, it is not surprising that with smaller aircraft on average, Virginia's airports underperformed their peers in general on O&D traffic levels per flight. With smaller aircraft, passengers per flight are also likely to be at lower levels. The same is true for O&D revenue per flight, which is also a function of the average aircraft size.

In addition, O&D traffic per seat and O&D traffic per capita are likely to be closely linked. Recall from Chapter 1 that while passenger traffic levels generally grew nationwide from 2010-2013, the level of passenger traffic in the Commonwealth of Virginia was relatively flat during that same period. That is, while passenger traffic was growing at Virginia's peer airports over the last few years, it remained relatively steady at Virginia's airports. This likely caused Virginia's airports to underperform their peers in these categories.

Two encouraging trends are the outperformance of Virginia's airports relative to their peers on O&D revenue per seat and ACQI connectivity score. The former suggests that airlines are likely to find high-yielding passengers flying out of Virginia's airports. This speaks to the strength of the business community in Virginia that would be more likely to supply high-yielding passengers. However, it could also cause some leisure passengers to divert to peer airports where lower fares are more likely to be found.

The performance of the Commonwealth of Virginia relative to its peers in connectivity to the global air transportation system is a testament to the value that the system of Virginia airports provides to the Commonwealth and its residents. The high connectivity score of Virginia's airports relative to their peers means that these airports offer a strong selection of nonstop and connecting flights to their passengers, and that Virginia's residents are likely to be able to reach most points in the nation and the world within one or two stops of their home airport. Given the close ties between air transportation connectivity and economic activity, the strong performance of Virginia in this category is again a good sign for Virginia's air transportation system.

This analysis highlights some areas in which Virginia's air transportation policy can focus its efforts—specifically, on attracting more passengers to the airports that fall below their peers in terms of O&D traffic per seat and per capita. Increasing passenger traffic at these airports will

likely provide incentive for airlines to up-gauge capacity, increasing the number of seats per departure and also the average O&D traffic and revenue per flight. That is, as passenger numbers at these airports continue to improve, these airports will likely begin to outperform their peers in some of the other service characteristics identified in Exhibit 4-1.

This benchmarking exercise and the review of national and regional trends in Chapter 1 helps to focus the discussion on Virginia's statewide air service strategy. In the next chapter, Virginia's smaller airports are discussed in detail. In that chapter, the benchmarking analysis shown here is used to inform policy recommendations for future growth in Virginia's air transportation system.

Additionally, for further detail on the benchmarking analyses completed for each of Virginia's airports, an Appendix is provided for this Chapter that contains a series of charts and exhibits for each of Virginia's primary commercial service airports. This document can be used as a reference for the performance of specific peers discussed in the analysis in this Chapter.

# **Appendix: Benchmarking Dashboards for Virginia Primary Commercial Service Airports**

# **Appendix: Benchmarking Dashboards for Virginia Primary Commercial Service Airports**

# Charlottesville (CHO)

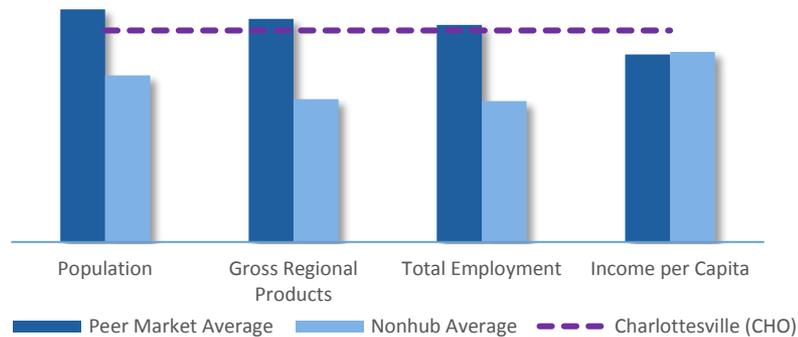
---

# Charlottesville (CHO)

## Peer Markets for Charlottesville



Charlottesville compared with peer market and Non-Hub average in key demographic & economic indicators



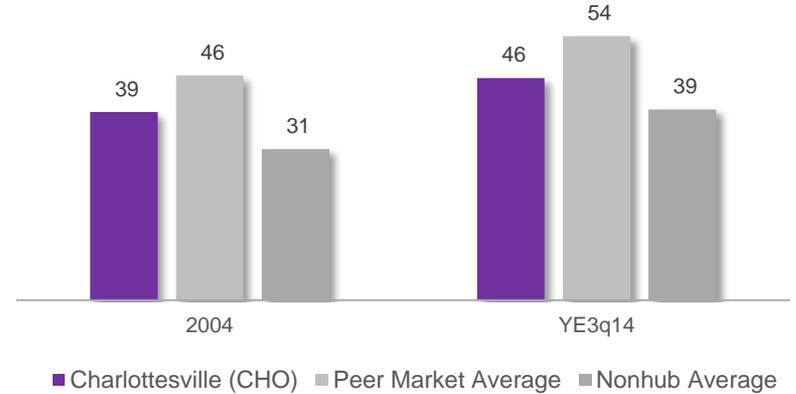
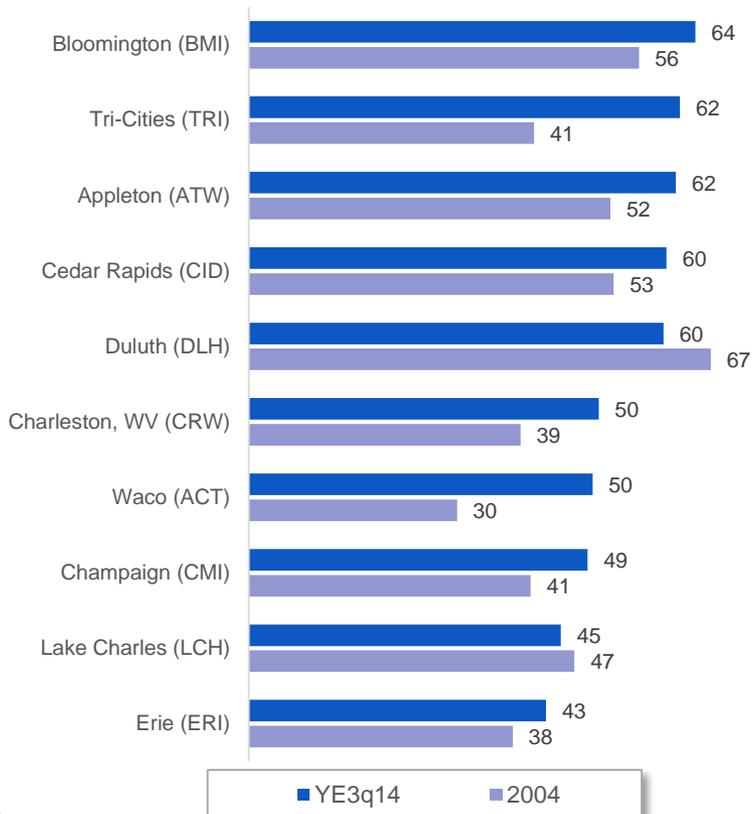
## 2014 Demographic & Economic Figures

Peer Market	Population	Gross Regional Products	Total Employment	Income per Capita
Waco (ACT)	264,825	\$10,361,929	147,243	\$36,202
Appleton (ATW)	235,817	\$10,519,657	153,606	\$42,607
Bloomington (BMI)	192,003	\$10,626,123	125,888	\$45,288
Cedar Rapids (CID)	266,272	\$14,570,458	179,437	\$45,991
Champaign (CMI)	237,219	\$9,934,243	140,307	\$40,140
Charleston, WV (CRW)	225,888	\$12,108,262	150,006	\$43,229
Duluth (DLH)	284,409	\$10,868,245	164,544	\$39,191
Erie (ERI)	282,674	\$10,561,016	164,358	\$37,615
Lake Charles (LCH)	207,287	\$10,297,724	116,557	\$39,516
Tri-Cities (TRI)	315,665	\$10,376,324	160,538	\$35,913
Charlottesville (CHO)	228,387	\$10,449,306	146,420	\$45,711
Peer Market Average	251,206	\$11,022,398	150,248	\$40,569
Non-Hub Average	180,001	\$7,050,325	97,649	\$41,113

# Charlottesville (CHO)

## Average Seats per Departure - Domestic

Average Seats per Departure – Peer Market



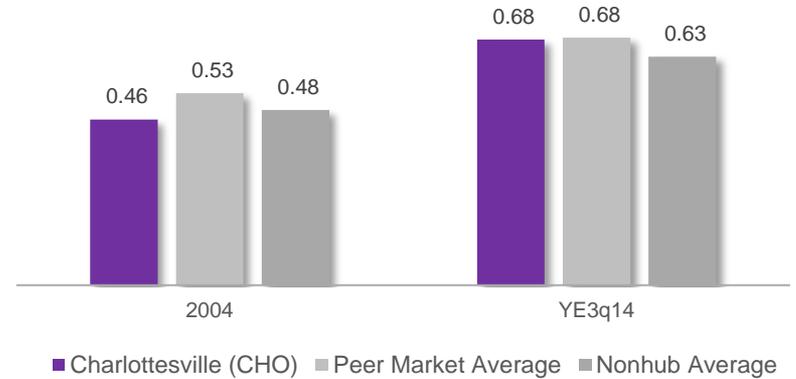
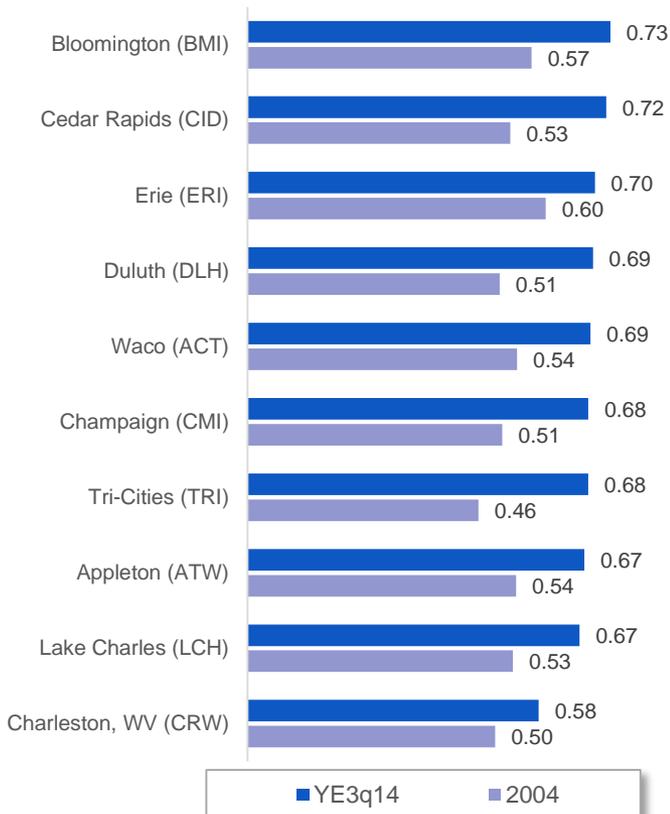
Rank	Top 10 Non-Hub Airportss	Average Seats per Departure – YE3q14
1	Portsmouth, NH (PSM)	170
2	Rockford, IL (RFD)	168
3	Latrobe, PA (LBE)	157
4	Bullhead City, AZ (IFP)	143
5	Trenton, NJ (TTN)	138
6	Vail/Eagle, CO (EGE)	123
7	Daytona Beach, FL (DAB)	122
8	Jackson Hole, WY (JAC)	112
9	Melbourne, FL (MLB)	107
10	Harlingen, TX (HRL)	102
139	Charlottesville (CHO)	46

Note: There were 261 Non-Hub airports as of April 2015

# Charlottesville (CHO)

## Average O&D Traffic per Seat - Domestic

Average O&D Traffic per Seat- Peer Market



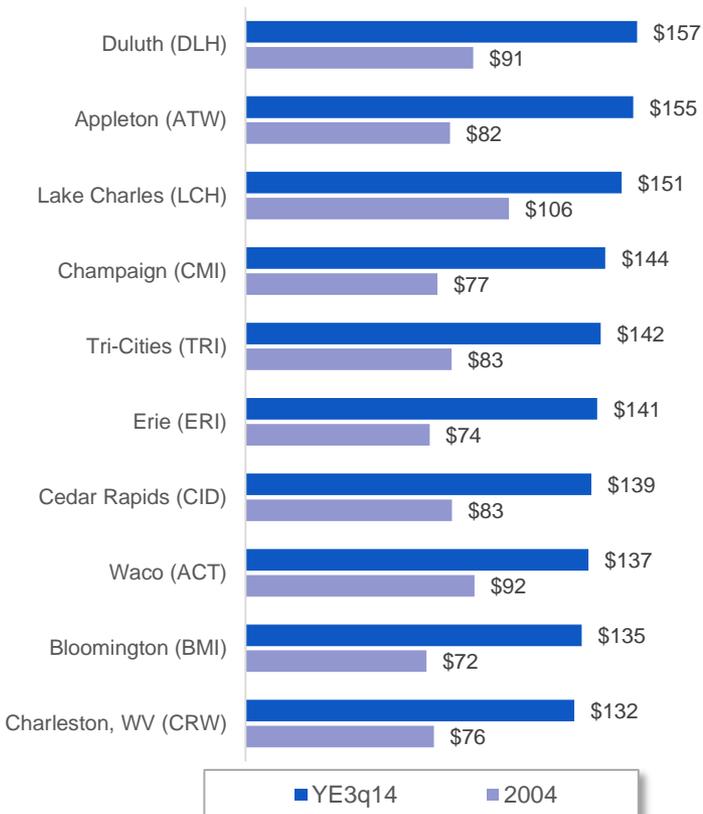
Rank	Top 10 Non-Hub Airports	Average OD Traffic per Seat – YE3q14
1	Rockford, IL (RFD)	0.93
2	Trenton, NJ (TTN)	0.90
3	Portsmouth, NH (PSM)	0.86
4	Latrobe, PA (LBE)	0.85
5	Daytona Beach, FL (DAB)	0.82
6	Newburgh, NY (SWF)	0.82
7	Grand Forks, ND (GFK)	0.80
8	Kalispell-Glacier, MT (FCA)	0.80
9	Toledo, OH (TOL)	0.80
10	Missoula, MT (MSO)	0.79
79	Charlottesville (CHO)	0.68

Note: There were 261 Non-Hub airports as of April 2015

# Charlottesville (CHO)

## Average O&D Revenue per Seat - Domestic

Average O&D Revenue per Seat– Peer Market



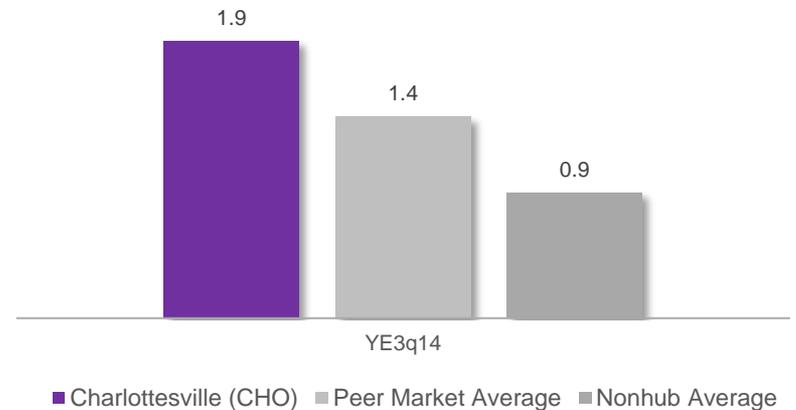
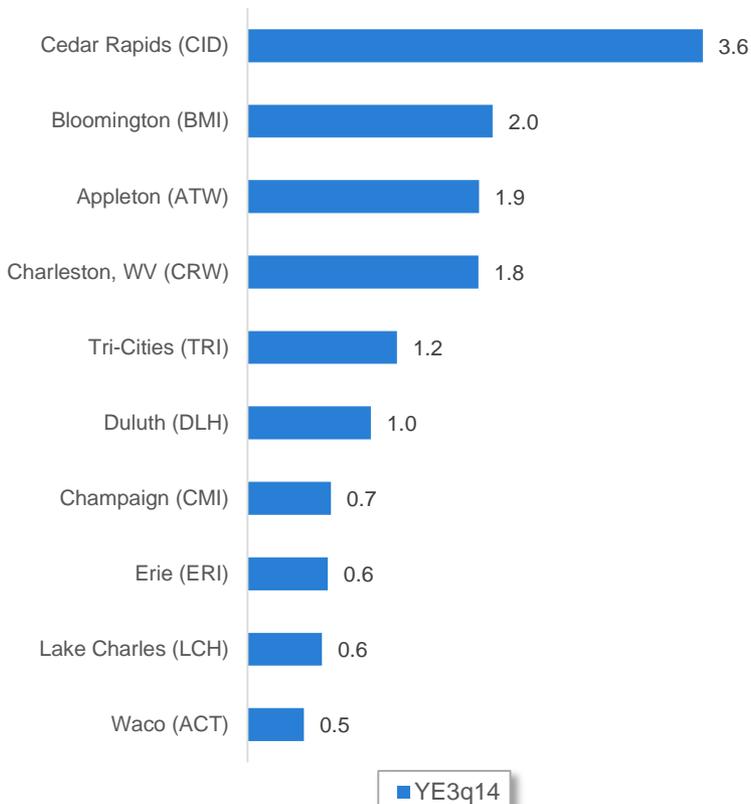
Rank	Top 10 Non-Hub Airports	Average OD Revenue per Seat – YE3q14
1	Dothan, AL (DHN)	\$197.6
2	Minot, ND (MOT)	\$197.3
3	Bakersfield, CA (BFL)	\$184.5
4	Jackson Hole, WY (JAC)	\$184.2
5	Marquette, MI (MQT)	\$183.9
6	Columbus, MS (GTR)	\$181.7
7	Elko, NV (EKO)	\$181.6
8	Dickinson, ND (DIK)	\$181.5
9	Bismarck, ND (BIS)	\$178.7
10	Kalispell-Glacier, MT (FCA)	\$178.2
90	Charlottesville (CHO)	\$142.0

Note: There were 261 Non-Hub airports as of April 2015

# Charlottesville (CHO)

## Average O&D Traffic per Capita - Domestic

### Average O&D Traffic per Capita – Peer Market



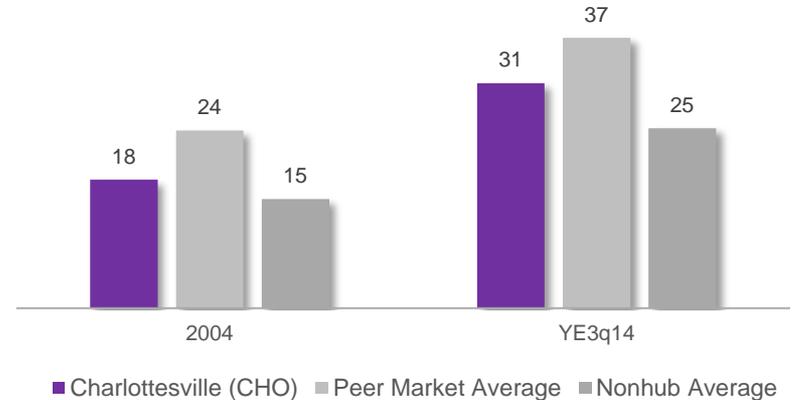
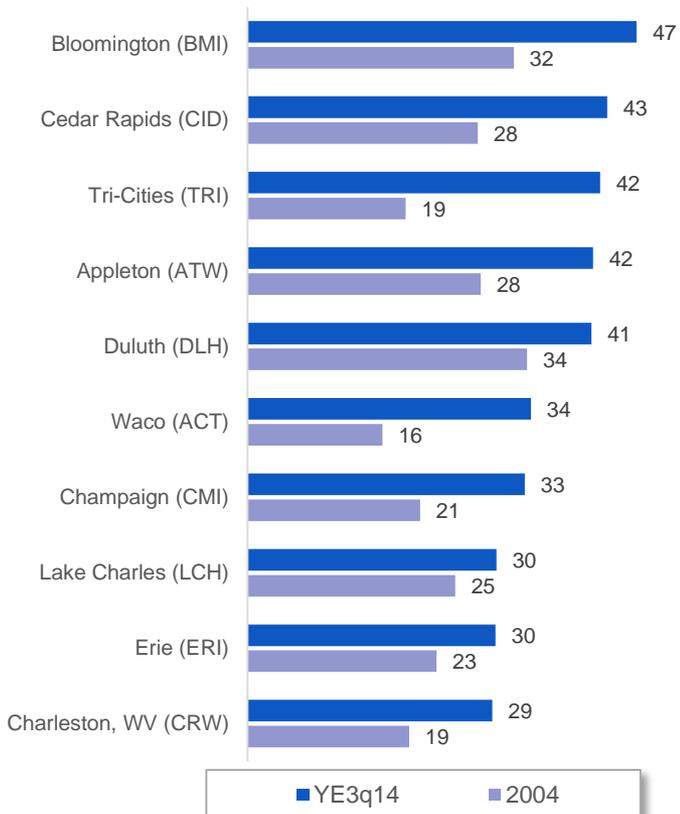
Rank	Top 10 Non-Hub Airports	Average OD Traffic per Capita – YE3q14
1	Jackson Hole, WY (JAC)	16.57
2	Durango, CO (DRO)	6.50
3	Minot, ND (MOT)	5.75
4	Vail/Eagle, CO (EGE)	5.38
5	Missoula, MT (MSO)	5.38
6	Martha's Vineyard, MA (MVY)	5.36
7	Steamboat Springs/Hayden, CO (HDN)	4.59
8	Great Falls, MT (GTF)	4.52
9	Kalispell-Glacier, MT (FCA)	4.37
10	Hailey-Sun Valley, ID (SUN)	4.20
35	Charlottesville (CHO)	1.90

Note: There were 261 Non-Hub airports as of April 2015

# Charlottesville (CHO)

## Average O&D Traffic per Flight - Domestic

Average O&D Traffic per Flight – Peer Market



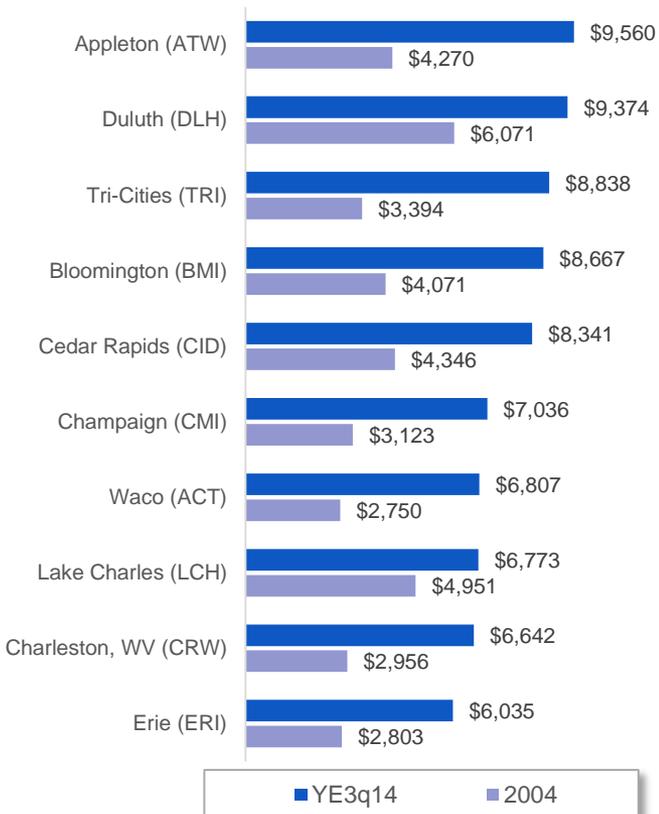
Rank	Top 10 Non-Hub Airports	Average OD Traffic per Flight – YE3q14
1	Rockford, IL (RFD)	156.2
2	Portsmouth, NH (PSM)	145.7
3	Latrobe, PA (LBE)	133.8
4	Trenton, NJ (TTN)	123.8
5	Daytona Beach, FL (DAB)	100.0
6	Melbourne, FL (MLB)	84.4
7	Jackson Hole, WY (JAC)	77.9
8	Vail/Eagle, CO (EGE)	74.9
9	McAllen, TX (MFE)	70.2
10	Harlingen, TX (HRL)	70.0
112	Charlottesville (CHO)	30.9

Note: There were 261 Non-Hub airports as of April 2015

# Charlottesville (CHO)

## Average O&D Revenue per Flight - Domestic

### Average O&D Revenue per Flight – Peer Market



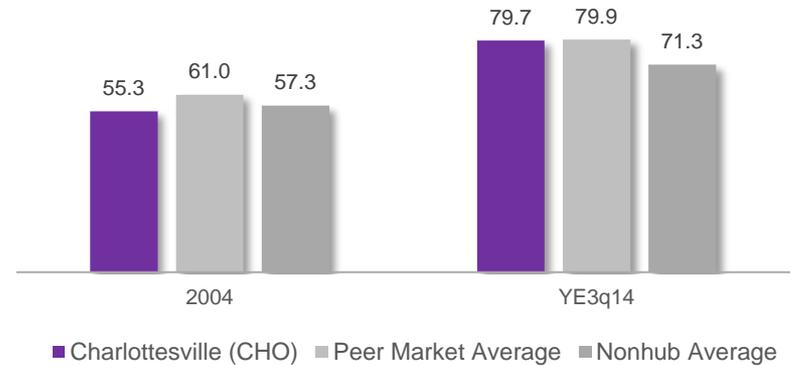
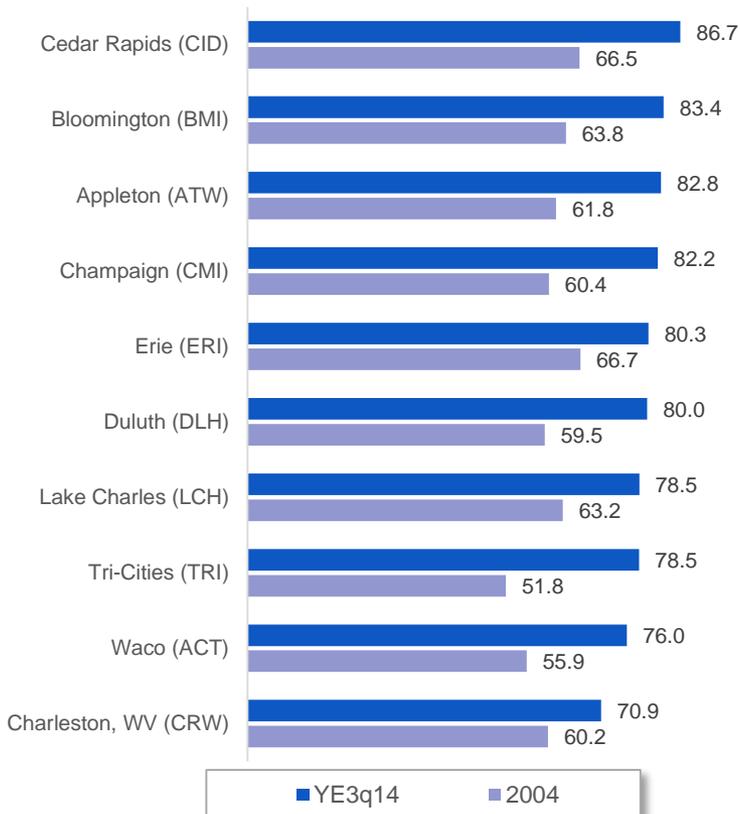
Rank	Top 10 Non-Hub Airports	Average OD Revenue per Flight – YE3q14
1	Jackson Hole, WY (JAC)	\$20,621
2	Vail/Eagle, CO (EGE)	\$19,231
3	Daytona Beach, FL (DAB)	\$17,436
4	Rockford, IL (RFD)	\$16,956
5	Melbourne, FL (MLB)	\$15,018
6	McAllen, TX (MFE)	\$13,979
7	Minot, ND (MOT)	\$13,859
8	Kalispell-Glacier, MT (FCA)	\$12,987
9	Steamboat Springs/Hayden, CO (HDN)	\$12,764
10	Portsmouth, NH (PSM)	\$12,419
121	Charlottesville (CHO)	\$6,505

Note: There were 261 Non-Hub airports as of April 2015

# Charlottesville (CHO)

## Average Load Factor % - Domestic

### Average Domestic Load Factor % – Peer Market

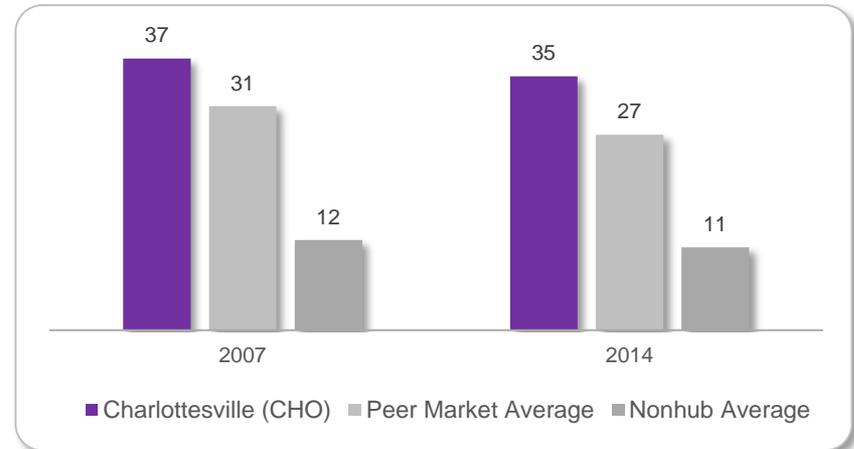
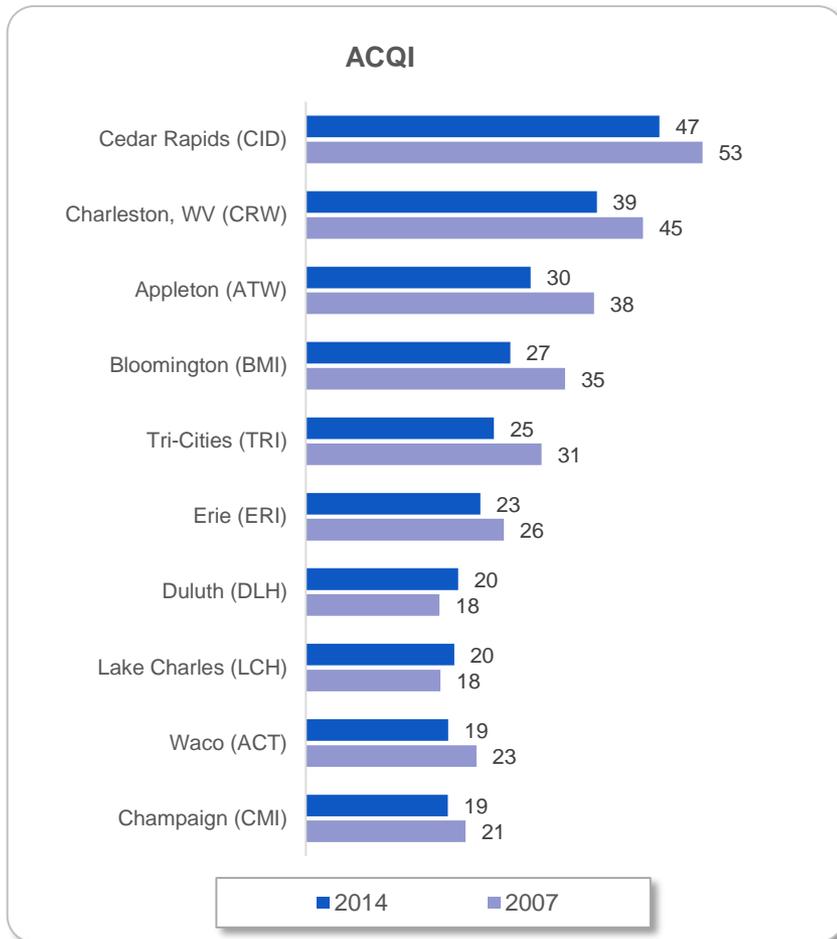


Rank	Top 10 Non-Hub Airports	Average Load Factor % – YE3q14
1	Rockford, IL (RFD)	91.8
2	Trenton, NJ (TTN)	90.1
3	Toledo, OH (TOL)	89.1
4	Portsmouth, NH (PSM)	87.9
5	Daytona Beach, FL (DAB)	87.7
6	South Bend, IN (SBN)	87.5
7	Newburgh, NY (SWF)	86.7
8	Hagerstown, MD (HGR)	86.5
9	Fort Wayne, IN (FWA)	86.3
10	Latrobe, PA (LBE)	86.0
56	Charlottesville (CHO)	79.7

Note: There were 261 Non-Hub airports as of April 2015

# Charlottesville (CHO)

## Airport Connectivity Quality Index - ACQI



Rank	Top 10 Non-Hub Airports	ACQI - 2014
1	Charleston, WV (CRW)	38.7
2	Tallahassee, FL (TLH)	38.4
3	Mobile, AL (MOB)	37.9
4	Roanoke, VA (ROA)	37.5
5	Shreveport, LA (SHV)	37.0
6	Lafayette, LA (LFT)	35.7
7	Peoria, IL (PIA)	35.7
8	Fort Wayne, IN (FWA)	35.6
9	Chattanooga, TN (CHA)	35.3
10	Green Bay, WI (GRB)	35.2
17	Charlottesville (CHO)	34.9

Note: There were 261 Non-Hub airports as of April 2015

# Reagan National (DCA)

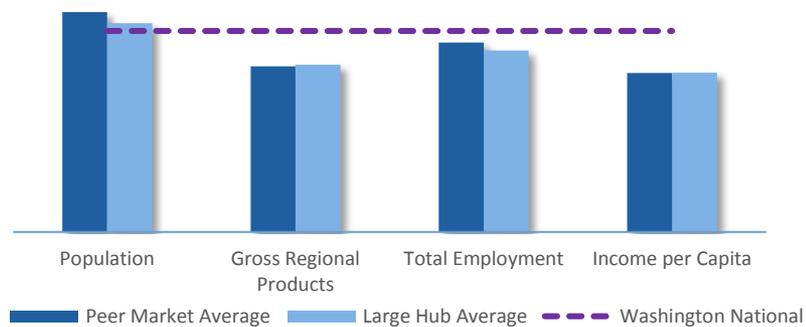
---

# Reagan National (DCA)

## Peer Markets for Reagan National



Reagan National compared with peer market and large hub average in key demographic & economic indicators



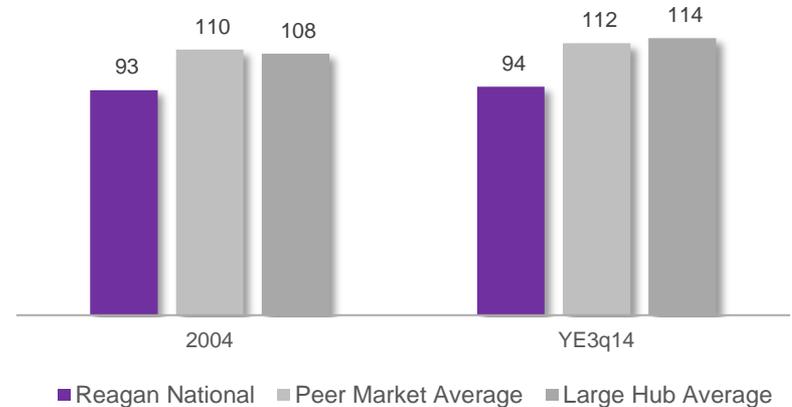
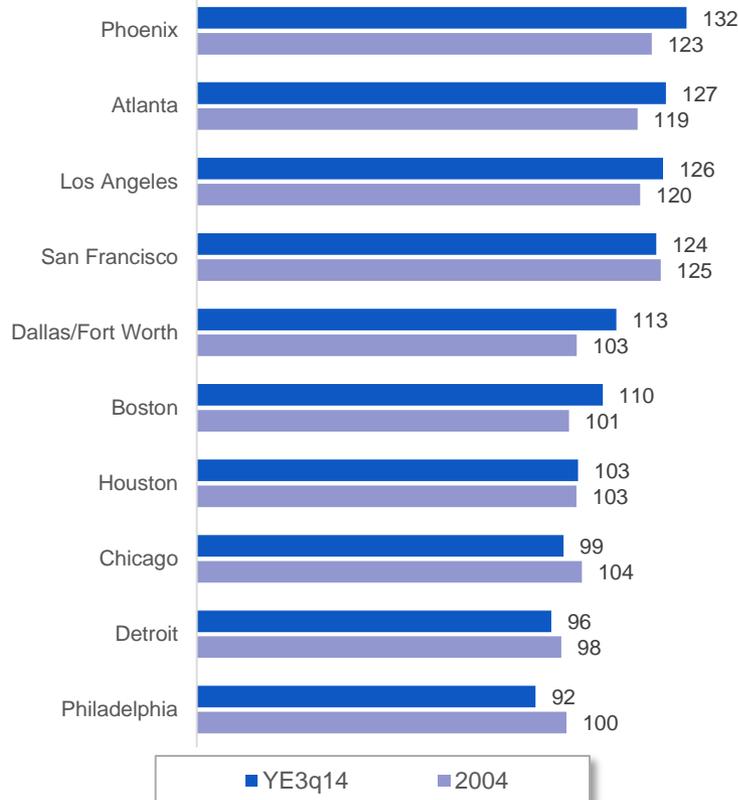
## 2014 Demographic & Economic Figures

Peer Market	Population	Gross Regional Products	Total Employment	Income per Capita
Los Angeles	13,244,883	\$723,551,015	7,681,614	\$48,233
Chicago	9,727,084	\$550,162,450	5,711,896	\$49,485
Dallas/Fort Worth	6,954,402	\$407,101,736	4,275,155	\$47,200
Houston	6,414,899	\$398,861,968	3,746,690	\$51,936
Philadelphia	6,080,659	\$343,683,554	3,564,763	\$52,993
Atlanta	5,663,104	\$281,008,863	3,294,343	\$42,805
Boston	4,678,923	\$326,785,183	3,238,870	\$62,707
Phoenix	4,512,889	\$197,178,224	2,397,720	\$39,996
San Francisco	4,486,364	\$327,272,484	2,824,207	\$66,280
Detroit	4,288,652	\$198,700,956	2,368,007	\$43,775
Reagan National	6,030,513	\$455,166,477	4,147,639	\$63,898
Peer Market Average	6,605,186	\$375,430,643	3,910,327	\$50,541
Large Hub Average	6,272,132	\$378,869,378	3,747,933	\$50,703

# Reagan National (DCA)

## Average Seats per Departure - Domestic

Average Seats per Departure – Peer Market



Rank	Top 10 Large Hub Airports	Average Seats per Departure – YE3q14
1	Las Vegas	149
2	Orlando	149
3	Miami	140
4	Tampa	137
5	San Diego	137
6	Baltimore	136
7	Phoenix	132
8	Seattle	132
9	Atlanta	127
10	Los Angeles	126
23	Reagan National (DCA)	94

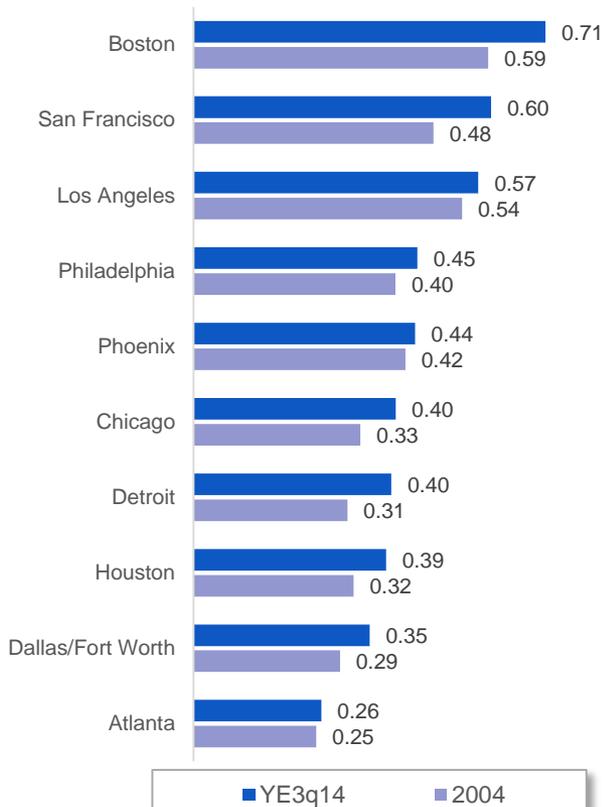
Note: There were 30 Large Hub airports as of April 2015

Source: Innovata schedules, via Diio online portal; InterVISTAS analysis.

# Reagan National (DCA)

## Average O&D Traffic per Seat - Domestic

Average O&D Traffic per Seat- Peer Market



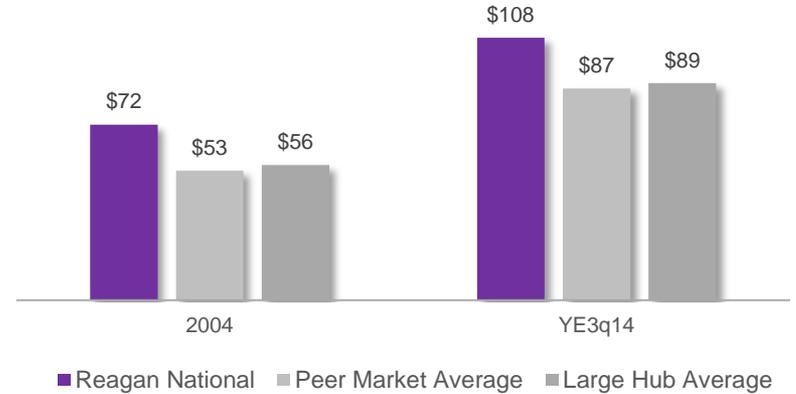
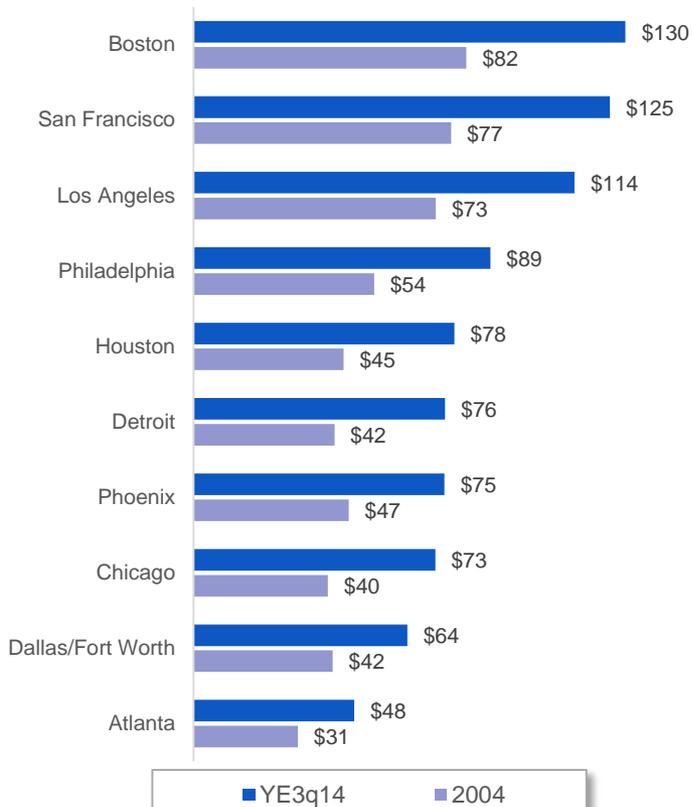
Rank	Top 10 Large Hub Airports	Average OD Traffic per Seat – YE3q14
1	Orlando	0.73
2	Tampa	0.72
3	San Diego	0.71
4	Boston	0.71
5	Portland, OR	0.65
6	Las Vegas	0.63
7	New York	0.60
8	San Francisco	0.60
9	Seattle	0.60
10	Miami	0.59
11	Reagan National (DCA)	0.58

Note: There were 30 Large Hub airports as of April 2015

# Reagan National (DCA)

## Average O&D Revenue per Seat - Domestic

Average O&D Revenue per Seat– Peer Market



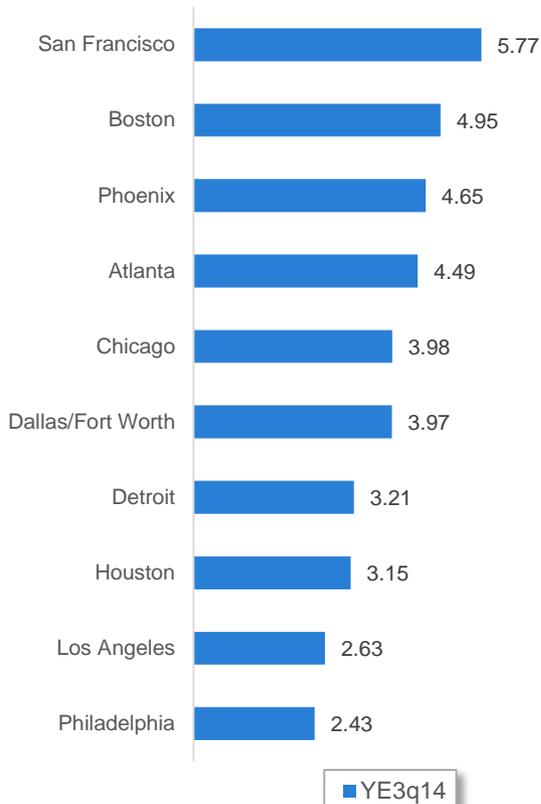
Rank	Top 10 Large Hub Airports	Average OD Revenue per Seat – YE3q14
1	Boston	\$129.8
2	San Diego	\$125.5
3	San Francisco	\$125.1
4	New York	\$122.2
5	Orlando	\$115.2
6	Los Angeles	\$114.5
7	Tampa	\$114.4
8	Portland, OR	\$109.6
9	Seattle	\$108.3
10	Reagan National (DCA)	\$108.2

Note: There were 30 Large Hub airports as of April 2015

# Reagan National (DCA)

## Average O&D Traffic per Capita - Domestic

### Average O&D Traffic per Capita – Peer Market



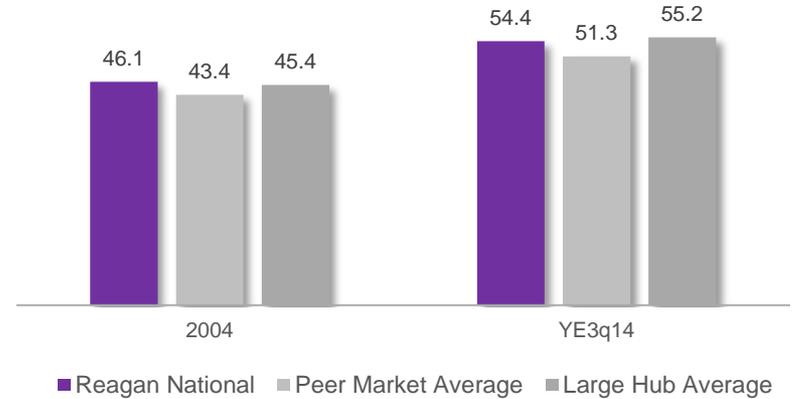
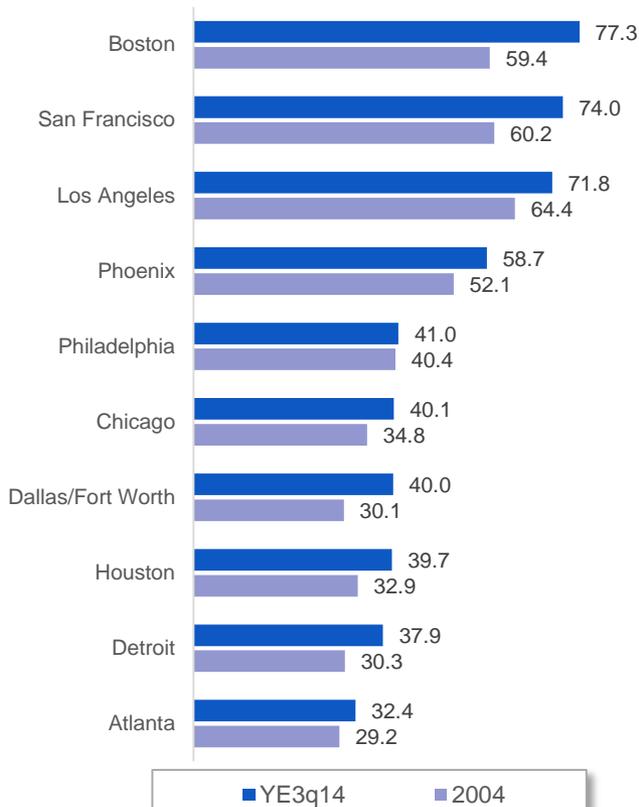
Rank	Top 10 Large Hub Airports	Average OD Traffic per Capita – YE3q14
1	Las Vegas	14.00
2	Orlando	11.43
3	Denver	10.43
4	Salt Lake City	8.64
5	Seattle	6.12
6	San Francisco	5.77
7	Miami	5.51
8	Baltimore	5.18
9	Portland, OR	5.07
10	Boston	4.95
23	Reagan National (DCA)	2.50

Note: There were 30 Large Hub airports as of April 2015

# Reagan National (DCA)

## Average O&D Traffic per Flight - Domestic

Average O&D Traffic per Flight – Peer Market



Rank	Top 10 Large Hub Airports	Average OD Traffic per Flight – YE3q14
1	Orlando	109.0
2	Tampa	98.2
3	San Diego	96.6
4	Las Vegas	93.7
5	Miami	82.4
6	Seattle	78.8
7	Boston	77.3
8	San Francisco	74.0
9	Portland, OR	72.7
10	Los Angeles	71.8
14	Reagan National (DCA)	54.4

Note: There were 30 Large Hub airports as of April 2015

# Reagan National (DCA)

## Average O&D Revenue per Flight - Domestic

### Average O&D Revenue per Flight – Peer Market



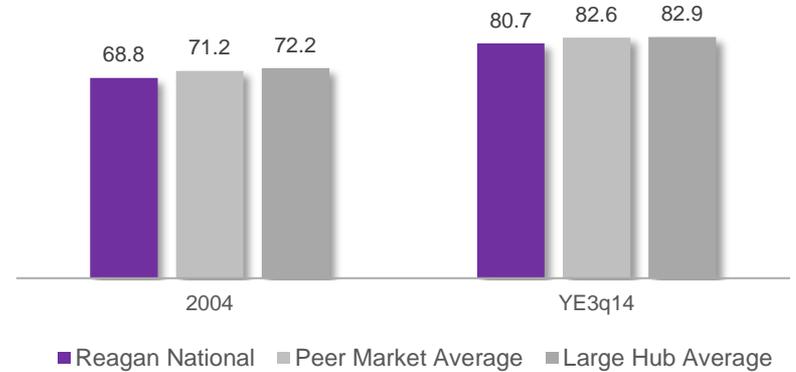
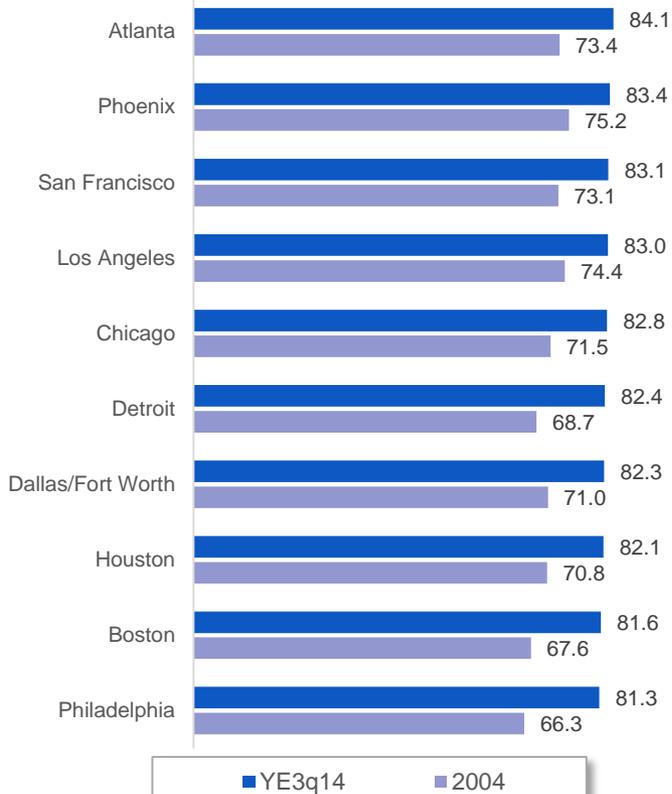
Rank	Top 10 Large Hub Airports	Average OD Revenue per Flight – YE3q14
1	Orlando	\$17,167
2	San Diego	\$17,140
3	Tampa	\$15,653
4	San Francisco	\$15,523
5	Las Vegas	\$14,669
6	Los Angeles	\$14,423
7	Seattle	\$14,314
8	Boston	\$14,229
9	Miami	\$13,902
10	New York	\$13,219
13	Reagan National (DCA)	\$10,192

Note: There were 30 Large Hub airports as of April 2015

# Reagan National (DCA)

## Average Load Factor % - Domestic

### Average Domestic Load Factor % – Peer Market

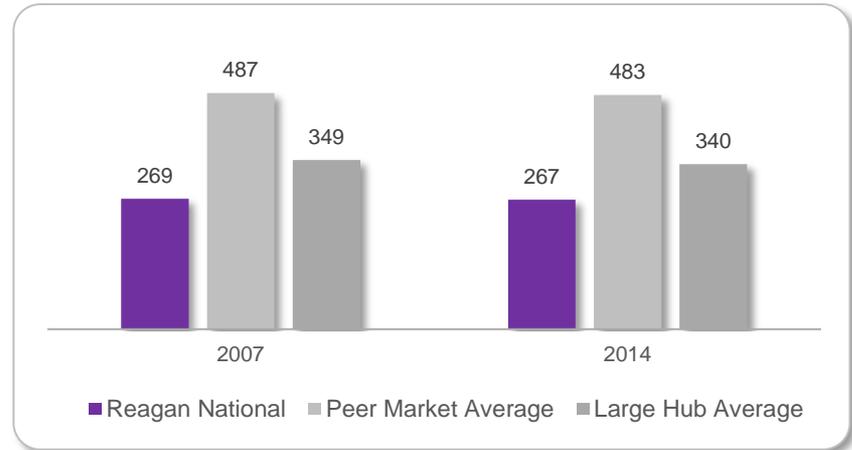
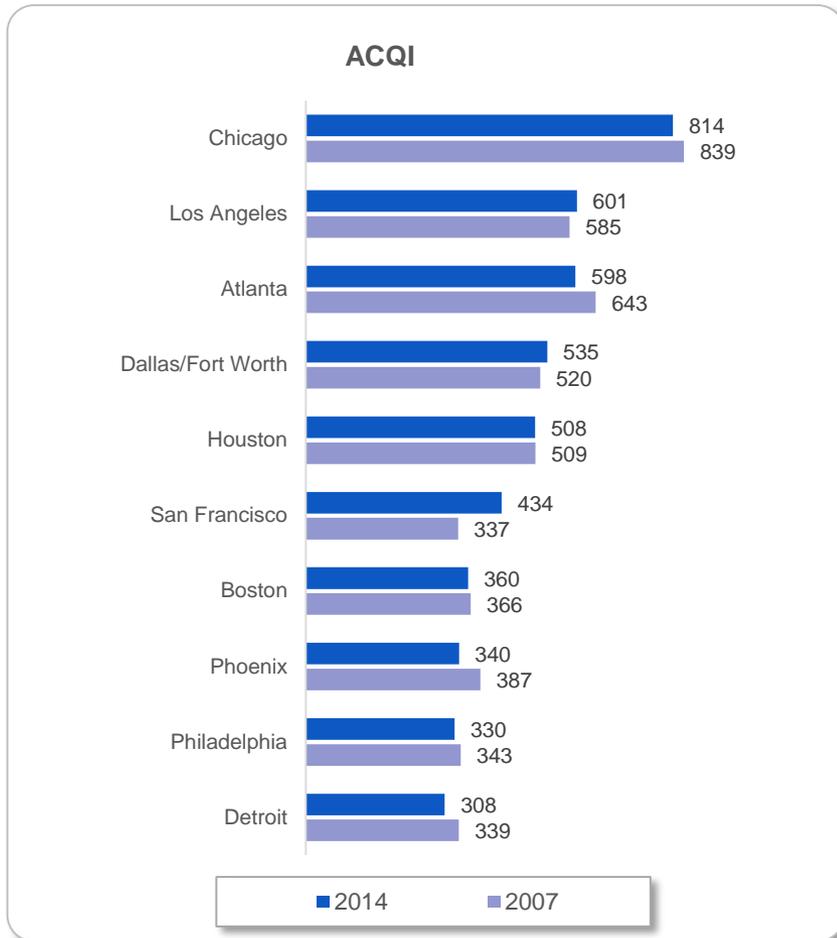


Rank	Top 10 Large Hub Airports	Average Load Factor % – YE3q14
1	Denver	85.9
2	Orlando	85.6
3	Seattle	84.6
4	Washington Dulles (IAD)	84.3
5	Atlanta	84.1
6	Charlotte	84.0
7	Miami	83.9
8	Tampa	83.4
9	Phoenix	83.4
10	Salt Lake City	83.3
23	Reagan National (DCA)	80.7

Note: There were 30 Large Hub airports as of April 2015

# Reagan National (DCA)

## Airport Connectivity Quality Index - ACQI



Rank	Top 10 Large Hub Airports	ACQI - 2014
1	New York	1,218
2	Chicago	814
3	Miami	629
4	Los Angeles	601
5	Atlanta	598
6	Dallas/Fort Worth	535
7	Houston	508
8	San Francisco	434
9	Denver	402
10	Boston	360
19	Reagan National (DCA)	267

Note: There were 30 Large Hub airports as of April 2015

# Washington Dulles (IAD)

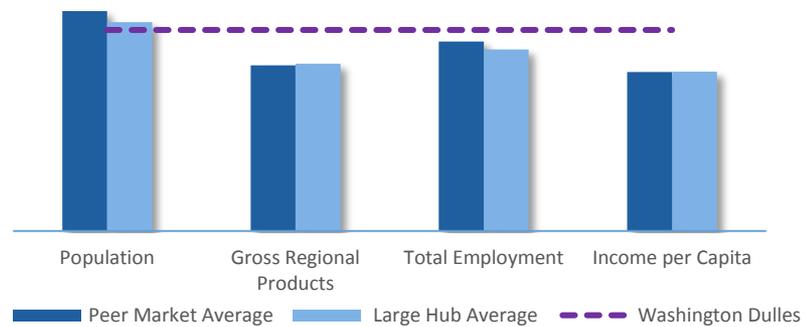
---

# Washington Dulles (IAD)

## Peer Markets for Washington Dulles



Washington Dulles compared with peer market and large hub average in key demographic & economic indicators



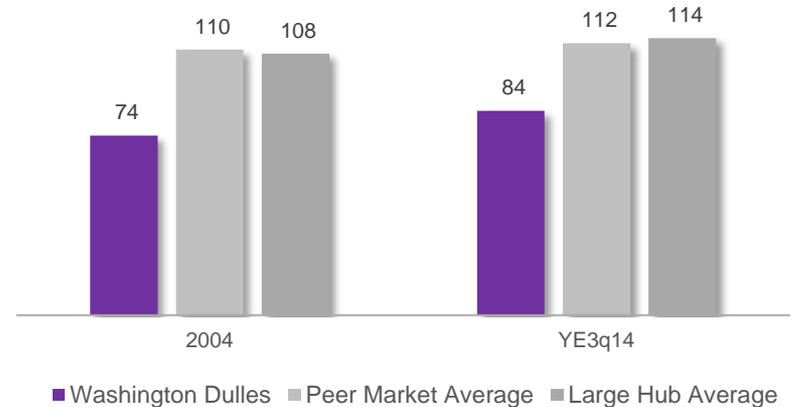
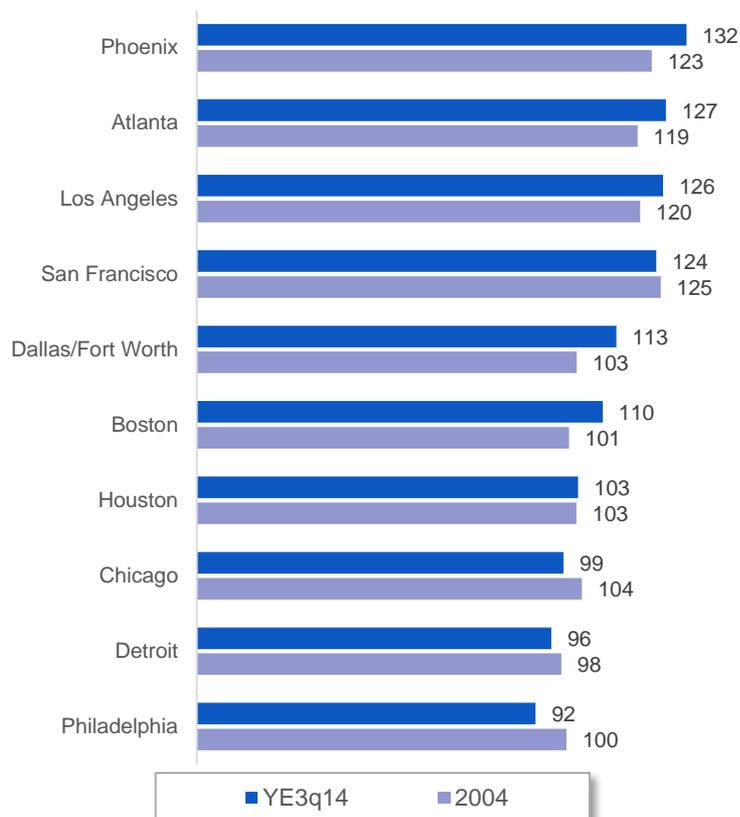
## 2014 Demographic & Economic Figures

Peer Market	Population	Gross Regional Products	Total Employment	Income per Capita
Los Angeles	13,244,883	\$723,551,015	7,681,614	\$48,233
Chicago	9,727,084	\$550,162,450	5,711,896	\$49,485
Dallas/Fort Worth	6,954,402	\$407,101,736	4,275,155	\$47,200
Houston	6,414,899	\$398,861,968	3,746,690	\$51,936
Philadelphia	6,080,659	\$343,683,554	3,564,763	\$52,993
Atlanta	5,663,104	\$281,008,863	3,294,343	\$42,805
Boston	4,678,923	\$326,785,183	3,238,870	\$62,707
Phoenix	4,512,889	\$197,178,224	2,397,720	\$39,996
San Francisco	4,486,364	\$327,272,484	2,824,207	\$66,280
Detroit	4,288,652	\$198,700,956	2,368,007	\$43,775
Washington Dulles	6,030,513	\$455,166,477	4,147,639	\$63,898
Peer Market Average	6,605,186	\$375,430,643	3,910,327	\$50,541
Large Hub Average	6,272,132	\$378,869,378	3,747,933	\$50,703

# Washington Dulles (IAD)

## Average Seats per Departure - Domestic

Average Seats per Departure – Peer Market



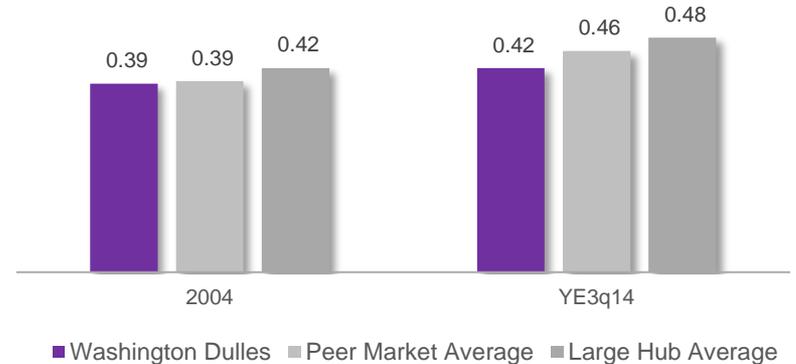
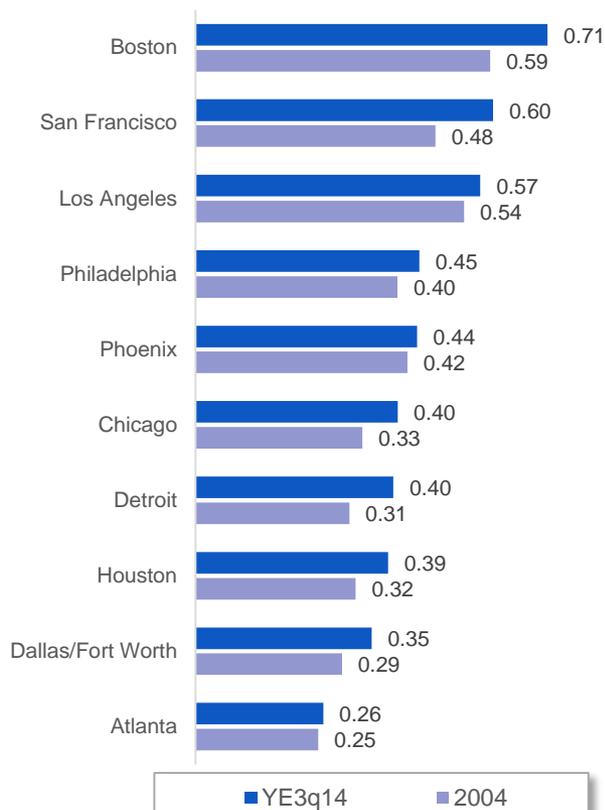
Rank	Top 10 Large Hub Airports	Average Seats per Departure – YE3q14
1	Las Vegas	149
2	Orlando	149
3	Miami	140
4	Tampa	137
5	San Diego	137
6	Baltimore	136
7	Phoenix	132
8	Seattle	132
9	Atlanta	127
10	Los Angeles	126
25	Washington Dulles (IAD)	84

Note: There were 30 Large Hub airports as of April 2015

# Washington Dulles (IAD)

## Average O&D Traffic per Seat - Domestic

Average O&D Traffic per Seat- Peer Market



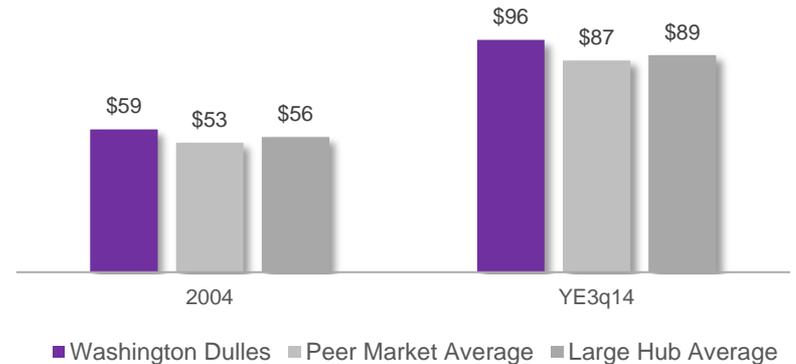
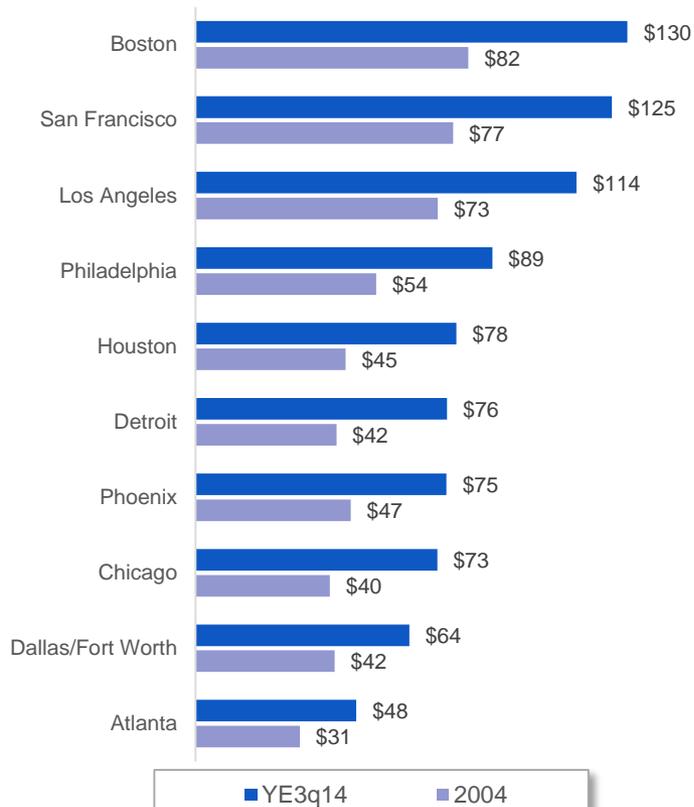
Rank	Top 10 Large Hub Airports	Average OD Traffic per Seat – YE3q14
1	Orlando	0.73
2	Tampa	0.72
3	San Diego	0.71
4	Boston	0.71
5	Portland, OR	0.65
6	Las Vegas	0.63
7	New York	0.60
8	San Francisco	0.60
9	Seattle	0.60
10	Miami	0.59
17	Washington Dulles (IAD)	0.42

Note: There were 30 Large Hub airports as of April 2015

# Washington Dulles (IAD)

## Average O&D Revenue per Seat - Domestic

Average O&D Revenue per Seat– Peer Market



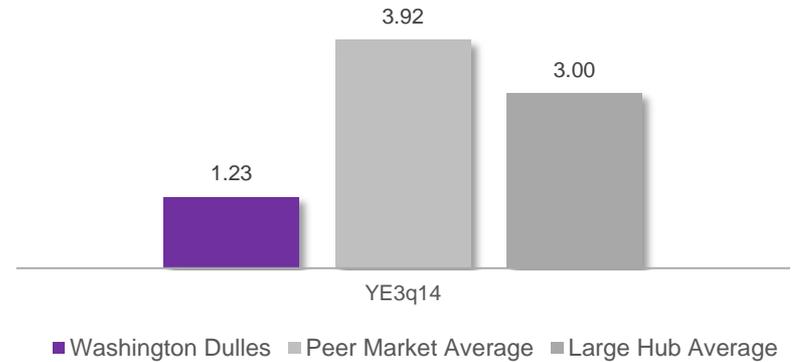
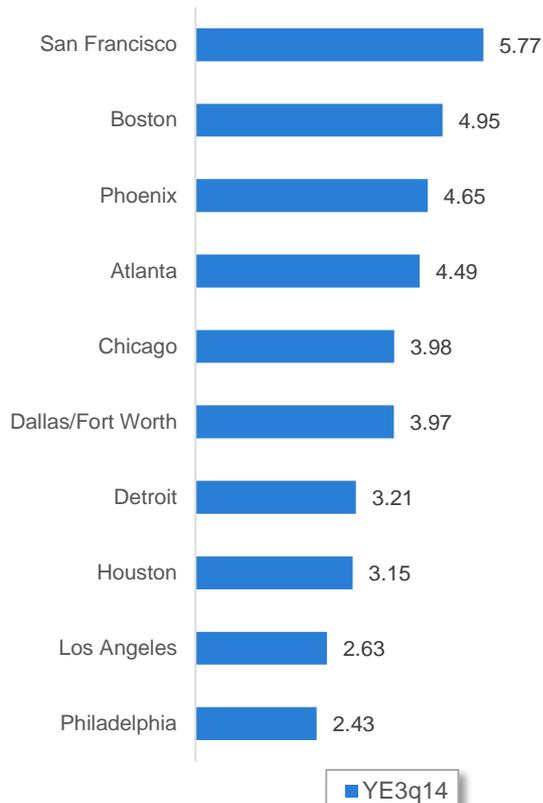
Rank	Top 10 Large Hub Airports	Average OD Revenue per Seat – YE3q14
1	Boston	\$129.8
2	San Diego	\$125.5
3	San Francisco	\$125.1
4	New York	\$122.2
5	Orlando	\$115.2
6	Los Angeles	\$114.5
7	Tampa	\$114.4
8	Portland, OR	\$109.6
9	Seattle	\$108.3
10	Reagan National	\$108.2
13	Washington Dulles (IAD)	\$95.8

Note: There were 30 Large Hub airports as of April 2015

# Washington Dulles (IAD)

## Average O&D Traffic per Capita - Domestic

### Average O&D Traffic per Capita – Peer Market



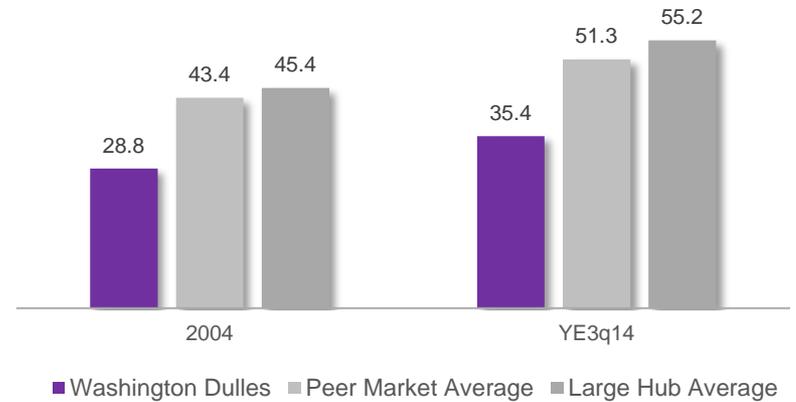
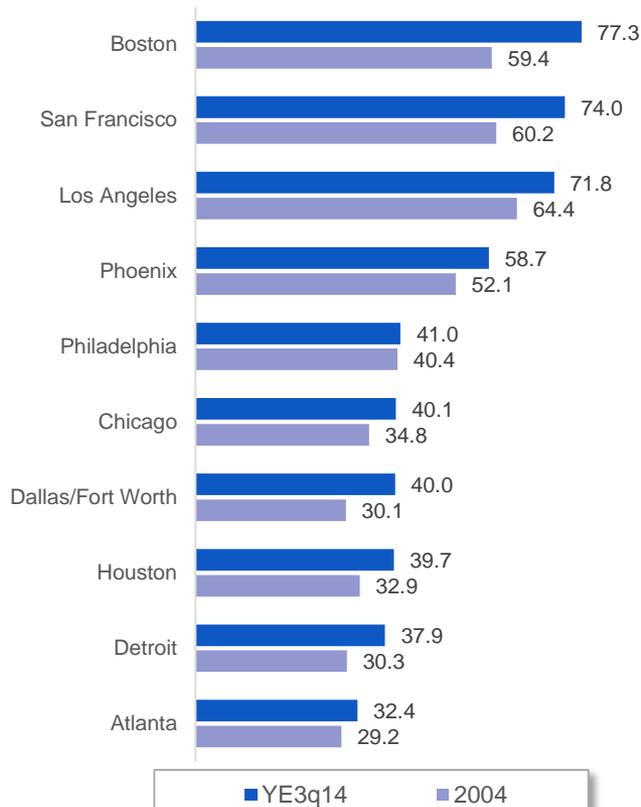
Rank	Top 10 Large Hub Airports	Average OD Traffic per Capita – YE3q14
1	Las Vegas	14.00
2	Orlando	11.43
3	Denver	10.43
4	Salt Lake City	8.64
5	Seattle	6.12
6	San Francisco	5.77
7	Miami	5.51
8	Baltimore	5.18
9	Portland, OR	5.07
10	Boston	4.95
25	Washington Dulles (IAD)	1.23

Note: There were 30 Large Hub airports as of April 2015

# Washington Dulles (IAD)

## Average O&D Traffic per Flight - Domestic

### Average O&D Traffic per Flight – Peer Market



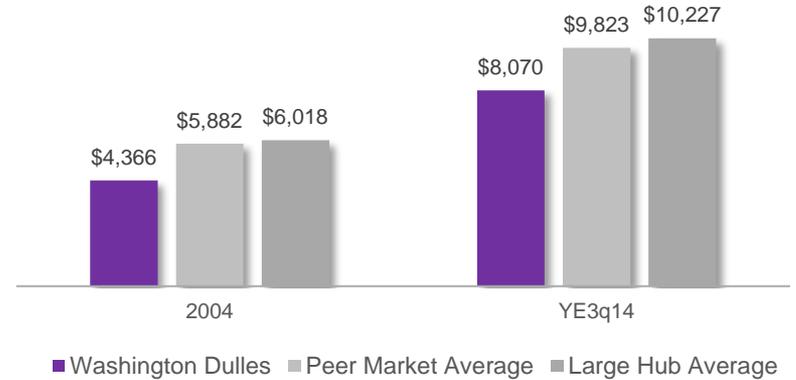
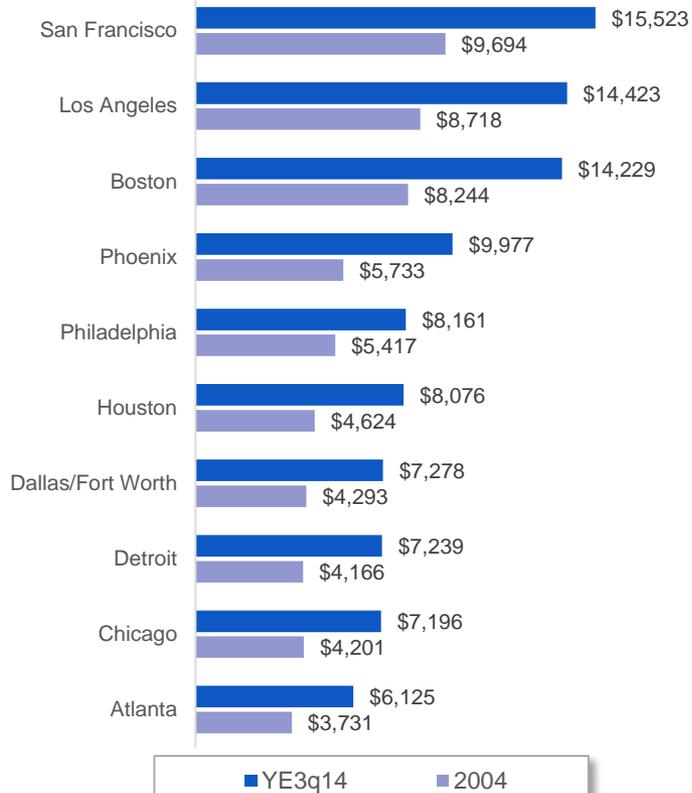
Rank	Top 10 Large Hub Airports	Average OD Traffic per Flight – YE3q14
1	Orlando	109.0
2	Tampa	98.2
3	San Diego	96.6
4	Las Vegas	93.7
5	Miami	82.4
6	Seattle	78.8
7	Boston	77.3
8	San Francisco	74.0
9	Portland, OR	72.7
10	Los Angeles	71.8
23	Washington Dulles (IAD)	35.4

Note: There were 30 Large Hub airports as of April 2015

# Washington Dulles (IAD)

## Average O&D Revenue per Flight - Domestic

### Average O&D Revenue per Flight – Peer Market



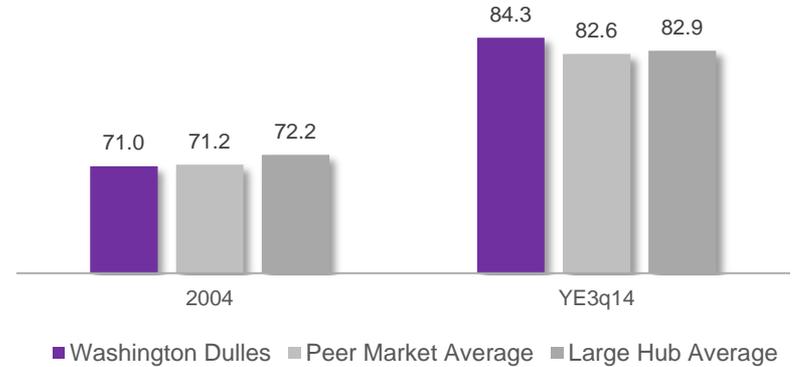
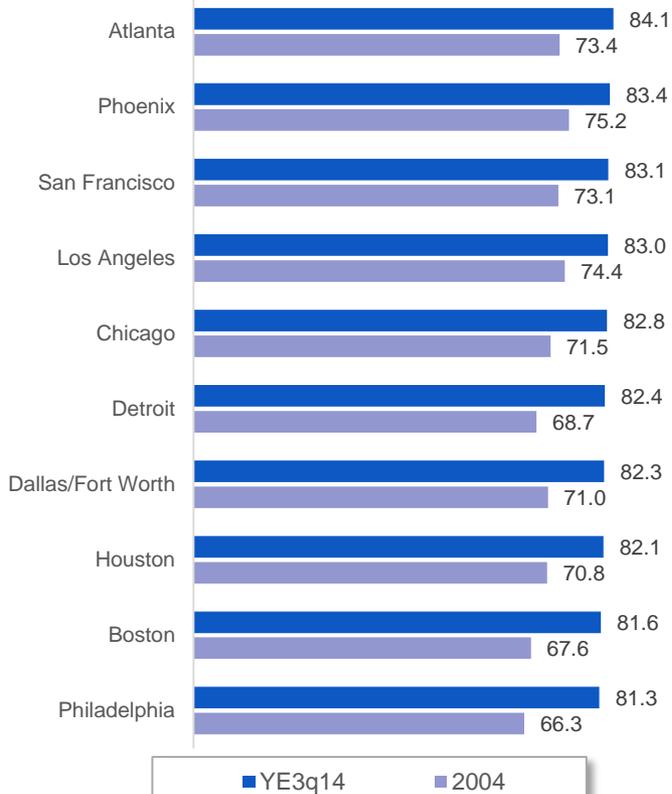
Rank	Top 10 Large Hub Airports	Average OD Revenue per Flight – YE3q14
1	Orlando	\$17,167
2	San Diego	\$17,140
3	Tampa	\$15,653
4	San Francisco	\$15,523
5	Las Vegas	\$14,669
6	Los Angeles	\$14,423
7	Seattle	\$14,314
8	Boston	\$14,229
9	Miami	\$13,902
10	New York	\$13,219
20	Washington Dulles (IAD)	\$8,070

Note: There were 30 Large Hub airports as of April 2015

# Washington Dulles (IAD)

## Average Load Factor % - Domestic

### Average Domestic Load Factor % – Peer Market

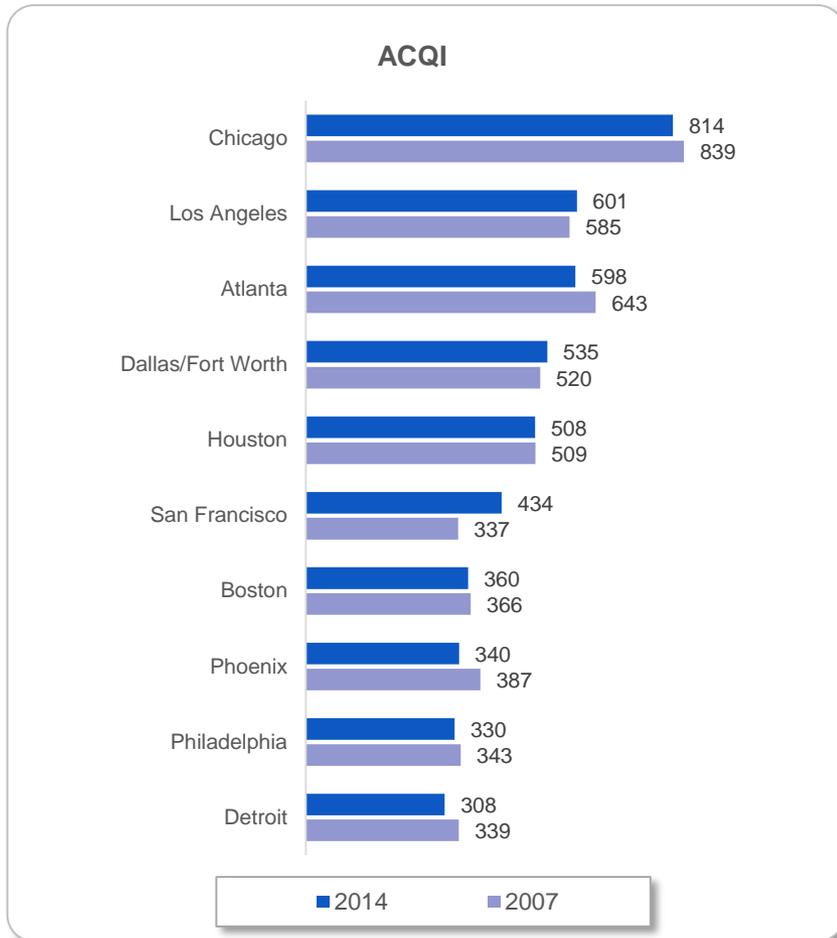


Rank	Top 10 Large Hub Airports	Average Load Factor % – YE3q14
1	Denver	85.9
2	Orlando	85.6
3	Seattle	84.6
4	Washington Dulles (IAD)	84.3
5	Atlanta	84.1
6	Charlotte	84.0
7	Miami	83.9
8	Tampa	83.4
9	Phoenix	83.4
10	Salt Lake City	83.3

Note: There were 30 Large Hub airports as of April 2015

# Washington Dulles (IAD)

## Airport Connectivity Quality Index - ACQI



Rank	Top 10 Large Hub Airports	ACQI - 2014
1	New York	1,218
2	Chicago	814
3	Miami	629
4	Los Angeles	601
5	Atlanta	598
6	Dallas/Fort Worth	535
7	Houston	508
8	San Francisco	434
9	Denver	402
10	Boston	360
20	Washington Dulles (IAD)	232

Note: There were 30 Large Hub airports as of April 2015

# Lynchburg

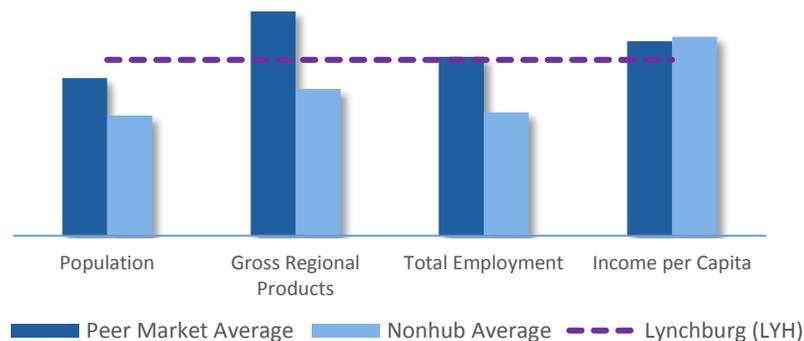
---

# Lynchburg (LYH)

## Peer Markets for Lynchburg



Lynchburg compared with peer market and Non-Hub average in key demographic & economic indicators



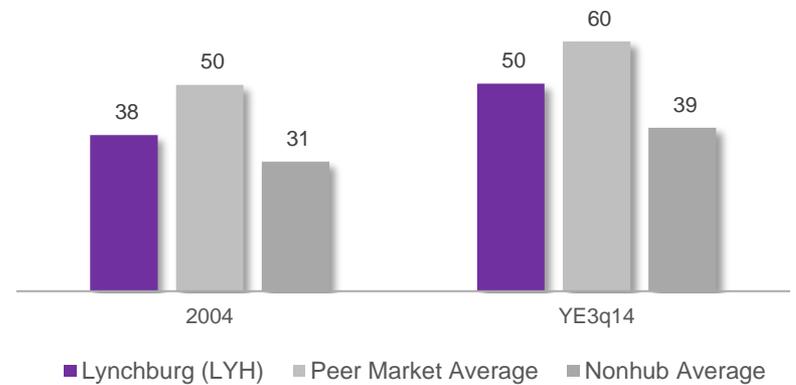
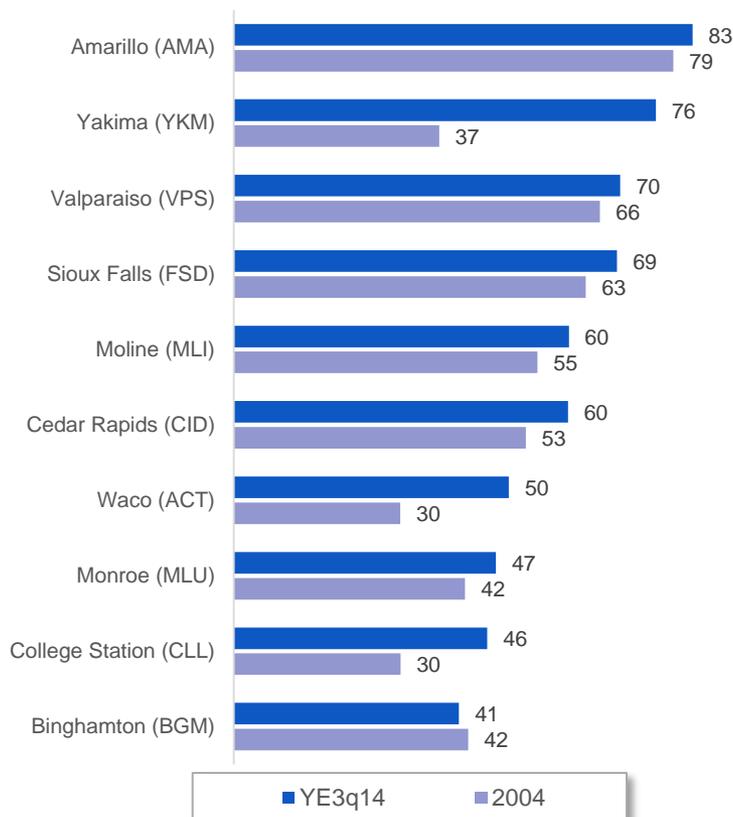
## 2014 Demographic & Economic Figures

Peer Market	Population	Gross Regional Products	Total Employment	Income per Capita
Waco (ACT)	264,825	\$10,361,929	147,243	\$36,202
Amarillo (AMA)	264,274	\$12,877,906	164,409	\$41,197
Binghamton (BGM)	250,504	\$8,964,882	133,276	\$38,860
Cedar Rapids (CID)	266,272	\$14,570,458	179,437	\$45,991
College Station (CLL)	241,488	\$9,039,999	130,525	\$32,425
Sioux Falls (FSD)	245,836	\$14,436,691	185,383	\$48,682
Moline (MLI)	147,857	\$9,195,783	92,395	\$41,756
Monroe (MLU)	180,680	\$7,788,513	103,193	\$36,717
Valparaiso (VPS)	248,669	\$12,109,652	156,774	\$43,987
Yakima (YKM)	251,068	\$8,303,682	124,340	\$36,214
Lynchburg (LYH)	263,684	\$8,445,121	139,339	\$36,396
Peer Market Average	236,147	\$10,764,950	141,698	\$40,203
Non-Hub Average	180,001	\$7,050,325	97,649	\$41,113

# Lynchburg (LYH)

## Average Seats per Departure - Domestic

Average Seats per Departure – Peer Market



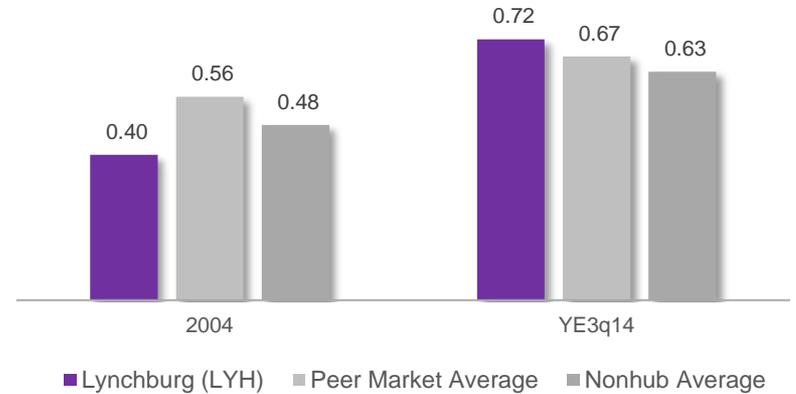
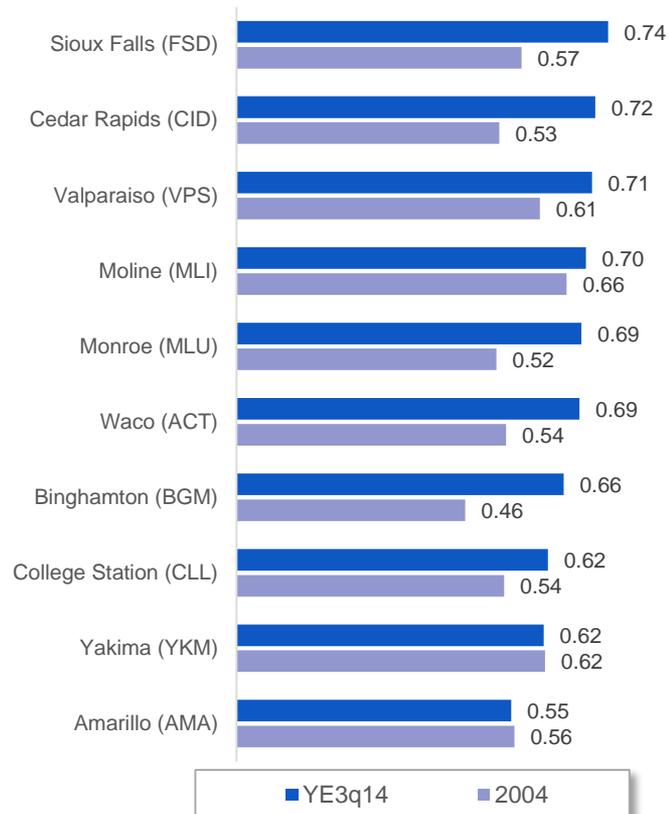
Rank	Top 10 Non-Hub Airports	Average Seats per Departure – YE3q14
1	Portsmouth, NH (PSM)	170
2	Rockford, IL (RFD)	168
3	Latrobe, PA (LBE)	157
4	Bullhead City, AZ (IFP)	143
5	Trenton, NJ (TTN)	138
6	Vail/Eagle, CO (EGE)	123
7	Daytona Beach, FL (DAB)	122
8	Jackson Hole, WY (JAC)	112
9	Melbourne, FL (MLB)	107
10	Harlingen, TX (HRL)	102
103	Lynchburg (LYH)	50

Note: There were 261 Non-Hub airports as of April 2015

# Lynchburg (LYH)

## Average O&D Traffic per Seat - Domestic

Average O&D Traffic per Seat- Peer Market



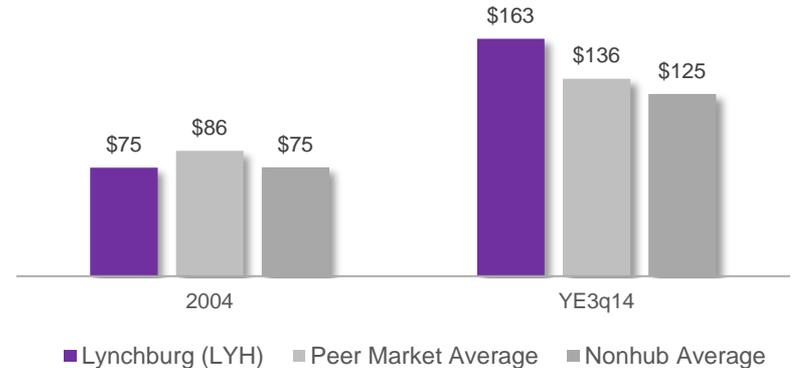
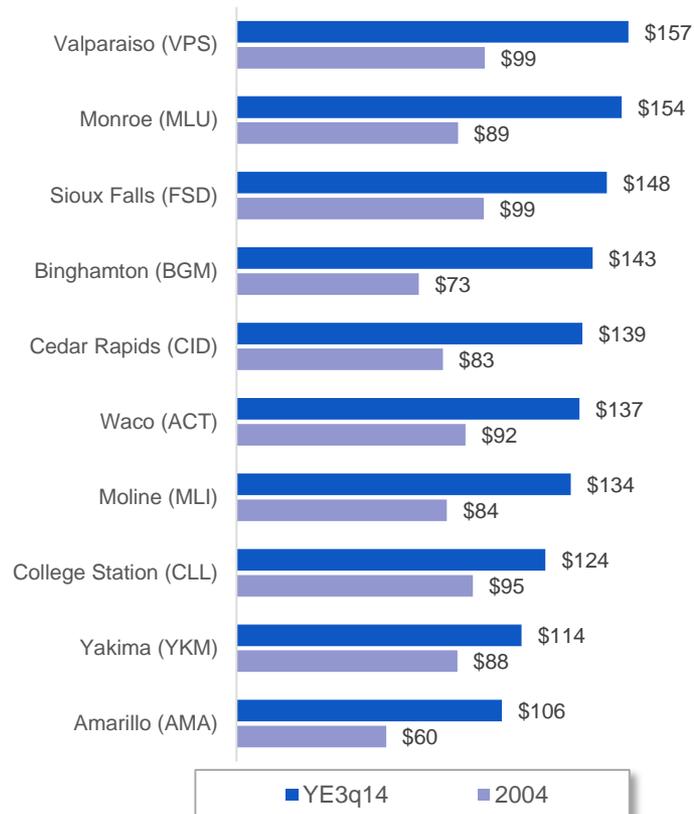
Rank	Top 10 Non-Hub Airports	Average OD Traffic per Seat – YE3q14
1	Rockford, IL (RFD)	0.93
2	Trenton, NJ (TTN)	0.90
3	Portsmouth, NH (PSM)	0.86
4	Latrobe, PA (LBE)	0.85
5	Daytona Beach, FL (DAB)	0.82
6	Newburgh, NY (SWF)	0.82
7	Grand Forks, ND (GFK)	0.80
8	Kalispell-Glacier, MT (FCA)	0.80
9	Toledo, OH (TOL)	0.80
10	Missoula, MT (MSO)	0.79
40	Lynchburg (LYH)	0.72

Note: There were 261 Non-Hub airports as of April 2015

# Lynchburg (LYH)

## Average O&D Revenue per Seat - Domestic

### Average O&D Revenue per Seat– Peer Market



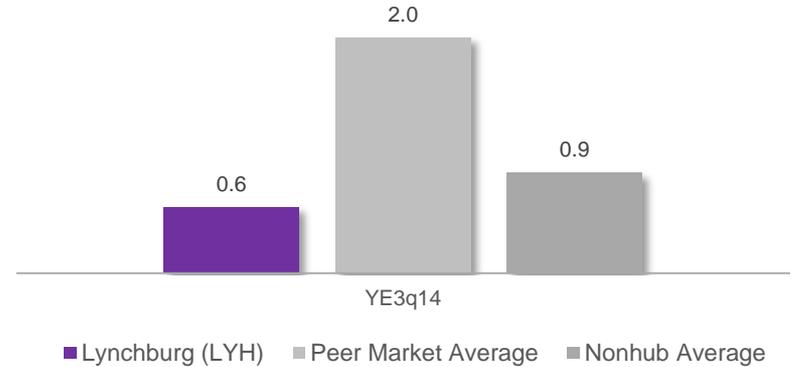
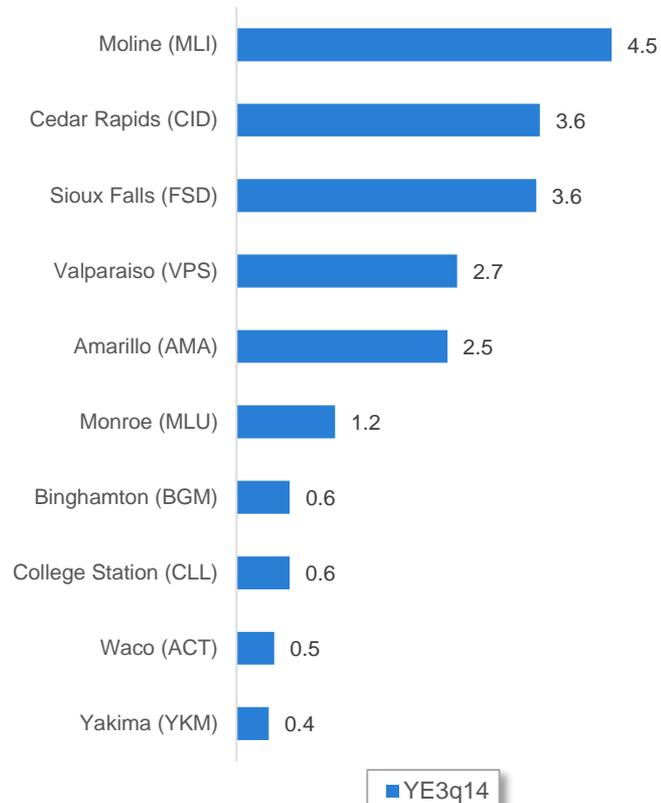
Rank	Top 10 Non-Hub Airports	Average OD Revenue per Seat – YE3q14
1	Dothan, AL (DHN)	\$197.6
2	Minot, ND (MOT)	\$197.3
3	Bakersfield, CA (BFL)	\$184.5
4	Jackson Hole, WY (JAC)	\$184.2
5	Marquette, MI (MQT)	\$183.9
6	Columbus, MS (GTR)	\$181.7
7	Elko, NV (EKO)	\$181.6
8	Dickinson, ND (DIK)	\$181.5
9	Bismarck, ND (BIS)	\$178.7
10	Kalispell-Glacier, MT (FCA)	\$178.2
25	Lynchburg (LYH)	\$163.1

Note: There were 261 Non-Hub airports as of April 2015

# Lynchburg (LYH)

## Average O&D Traffic per Capita - Domestic

### Average O&D Traffic per Capita – Peer Market



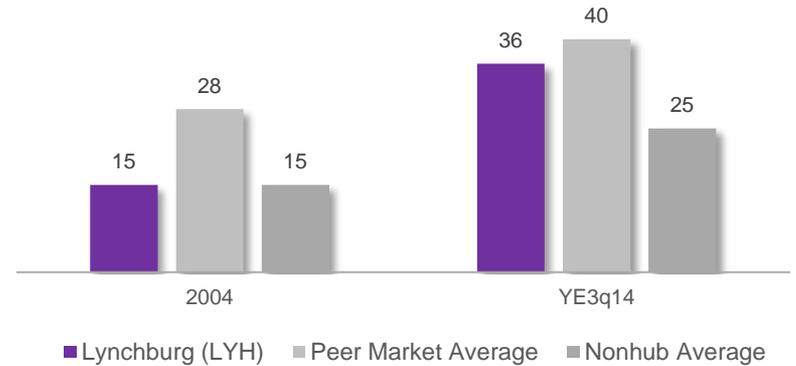
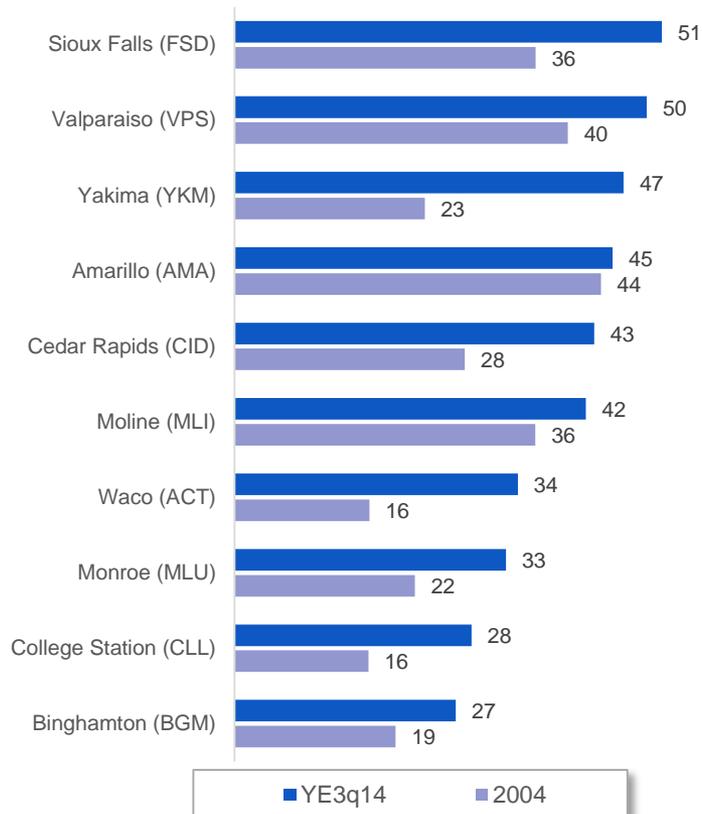
Rank	Top 10 Non-Hub Airports	Average OD Traffic per Capita – YE3q14
1	Jackson Hole, WY (JAC)	16.57
2	Durango, CO (DRO)	6.50
3	Minot, ND (MOT)	5.75
4	Vail/Eagle, CO (EGE)	5.38
5	Missoula, MT (MSO)	5.38
6	Martha's Vineyard, MA (MVY)	5.36
7	Steamboat Springs/Hayden, CO (HDN)	4.59
8	Great Falls, MT (GTF)	4.52
9	Kalispell-Glacier, MT (FCA)	4.37
10	Hailey-Sun Valley, ID (SUN)	4.20
133	Lynchburg (LYH)	0.57

Note: There were 261 Non-Hub airports as of April 2015

# Lynchburg (LYH)

## Average O&D Traffic per Flight - Domestic

Average O&D Traffic per Flight – Peer Market



Rank	Top 10 Non-Hub Airports	Average OD Traffic per Flight – YE3q14
1	Rockford, IL (RFD)	156.2
2	Portsmouth, NH (PSM)	145.7
3	Latrobe, PA (LBE)	133.8
4	Trenton, NJ (TTN)	123.8
5	Daytona Beach, FL (DAB)	100.0
6	Melbourne, FL (MLB)	84.4
7	Jackson Hole, WY (JAC)	77.9
8	Vail/Eagle, CO (EGE)	74.9
9	McAllen, TX (MFE)	70.2
10	Harlingen, TX (HRL)	70.0
69	Lynchburg (LYH)	35.8

Note: There were 261 Non-Hub airports as of April 2015

# Lynchburg (LYH)

## Average O&D Revenue per Flight - Domestic

### Average O&D Revenue per Flight – Peer Market



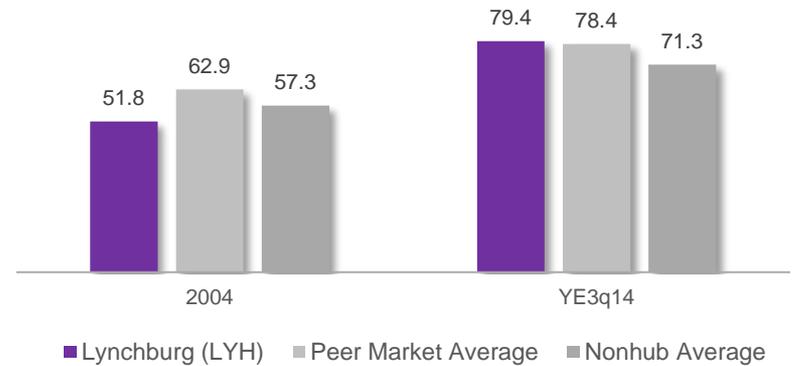
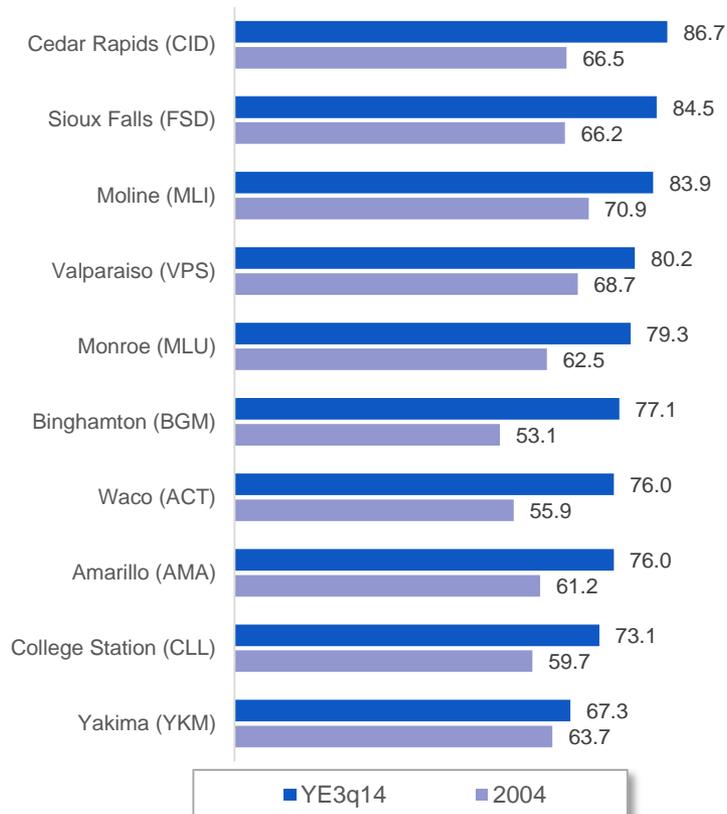
Rank	Top 10 Non-Hub Airports	Average OD Revenue per Flight – YE3q14
1	Jackson Hole, WY (JAC)	\$20,621
2	Vail/Eagle, CO (EGE)	\$19,231
3	Daytona Beach, FL (DAB)	\$17,436
4	Rockford, IL (RFD)	\$16,956
5	Melbourne, FL (MLB)	\$15,018
6	McAllen, TX (MFE)	\$13,979
7	Minot, ND (MOT)	\$13,859
8	Kalispell-Glacier, MT (FCA)	\$12,987
9	Steamboat Springs/Hayden, CO (HDN)	\$12,764
10	Portsmouth, NH (PSM)	\$12,419
64	Lynchburg (LYH)	\$8,143

Note: There were 261 Non-Hub airports as of April 2015

# Lynchburg (LYH)

## Average Load Factor % - Domestic

### Average Domestic Load Factor % – Peer Market

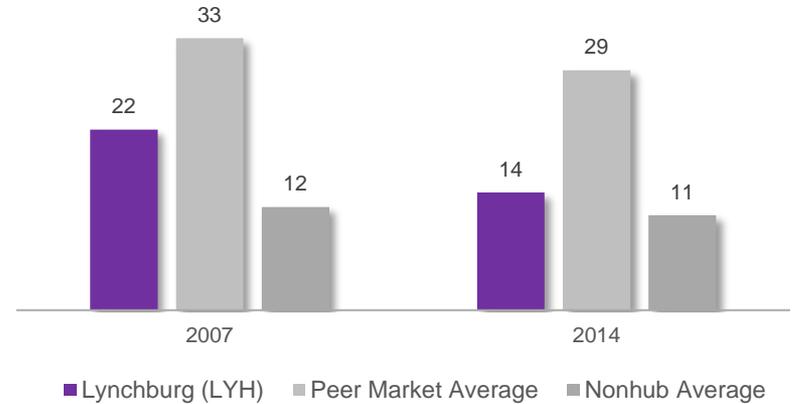
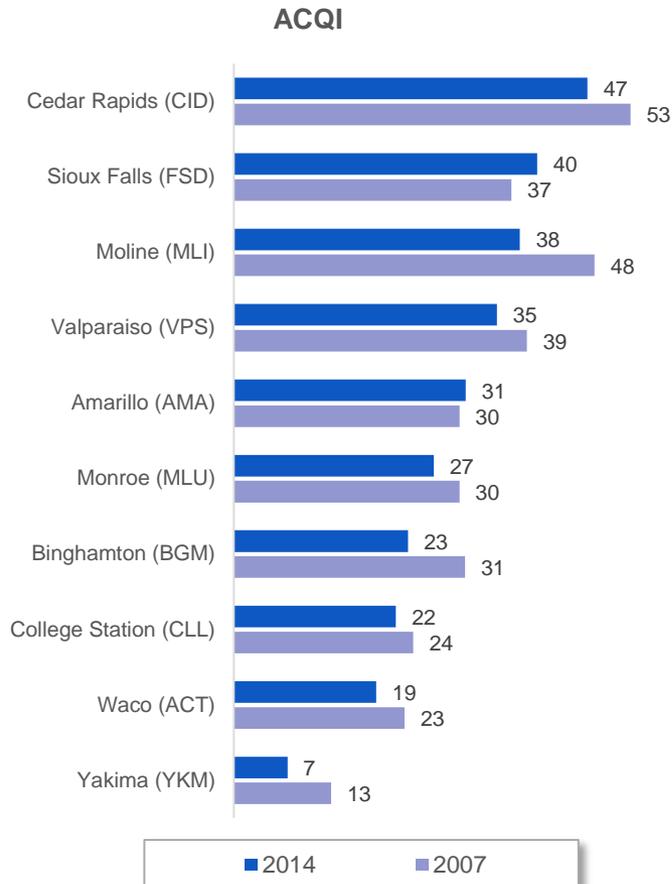


Rank	Top 10 Non-Hub Airports	Average Load Factor % – YE3q14
1	Rockford, IL (RFD)	91.8
2	Trenton, NJ (TTN)	90.1
3	Toledo, OH (TOL)	89.1
4	Portsmouth, NH (PSM)	87.9
5	Daytona Beach, FL (DAB)	87.7
6	South Bend, IN (SBN)	87.5
7	Newburgh, NY (SWF)	86.7
8	Hagerstown, MD (HGR)	86.5
9	Fort Wayne, IN (FWA)	86.3
10	Latrobe, PA (LBE)	86.0
59	Lynchburg (LYH)	79.4

Note: There were 261 Non-Hub airports as of April 2015

# Lynchburg (LYH)

## Airport Connectivity Quality Index - ACQI



Rank	Top 10 Non-Hub Airports	ACQI - 2014
1	Charleston, WV (CRW)	38.7
2	Tallahassee, FL (TLH)	38.4
3	Mobile, AL (MOB)	37.9
4	Roanoke, VA (ROA)	37.5
5	Shreveport, LA (SHV)	37.0
6	Lafayette, LA (LFT)	35.7
7	Peoria, IL (PIA)	35.7
8	Fort Wayne, IN (FWA)	35.6
9	Chattanooga, TN (CHA)	35.3
10	Green Bay, WI (GRB)	35.2
104	Lynchburg (LYH)	14.2

Note: There were 261 Non-Hub airports as of April 2015

# Newport News

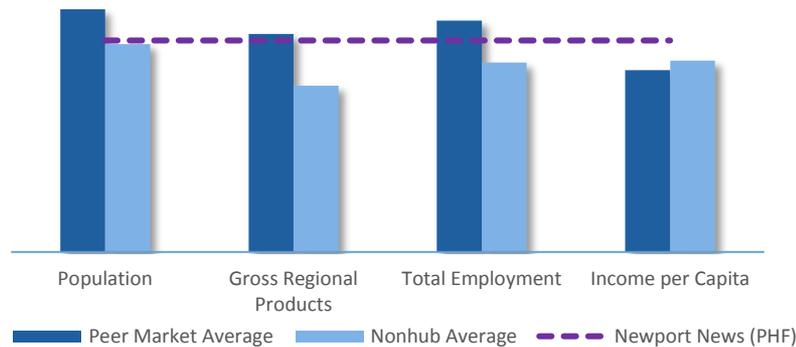
---

# Newport News (PHF)

## Peer Markets for Newport News



Newport News compared with peer market and Non-Hub average in key demographic & economic indicators



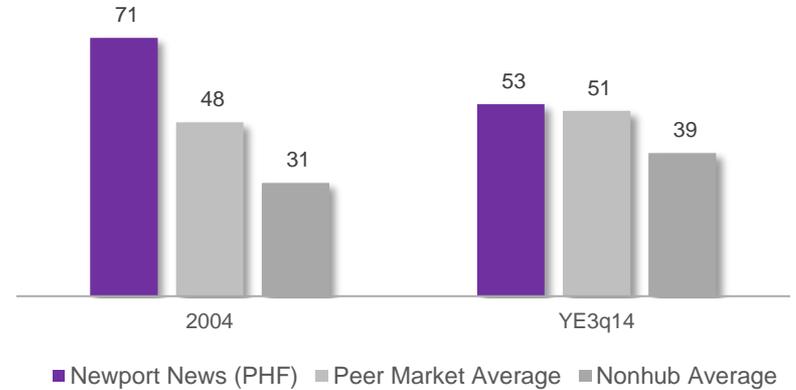
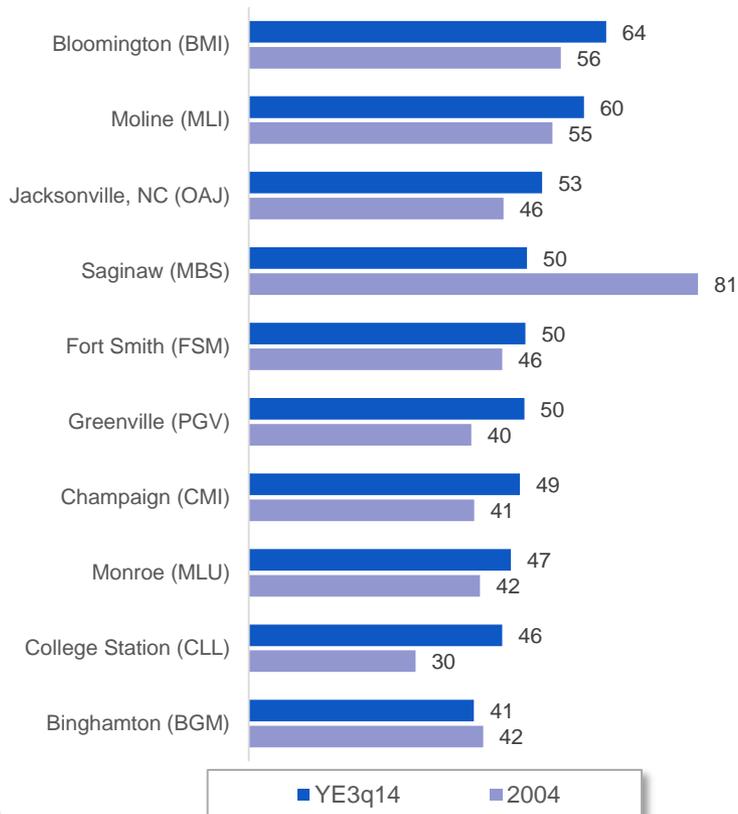
## 2014 Demographic & Economic Figures

Peer Market	Population	Gross Regional Products	Total Employment	Income per Capita
Binghamton (BGM)	250,504	\$8,964,882	133,276	\$38,860
Bloomington (BMI)	192,003	\$10,626,123	125,888	\$45,288
College Station (CLL)	241,488	\$9,039,999	130,525	\$32,425
Champaign (CMI)	237,219	\$9,934,243	140,307	\$40,140
Fort Smith (FSM)	291,158	\$9,832,715	150,250	\$34,390
Saginaw (MBS)	199,573	\$7,077,383	106,115	\$34,632
Moline (MLI)	147,857	\$9,195,783	92,395	\$41,756
Monroe (MLU)	180,680	\$7,788,513	103,193	\$36,717
Jacksonville, NC (OAJ)	181,319	\$12,872,894	115,070	\$50,583
Greenville (PGV)	178,964	\$7,082,609	95,500	\$35,853
Newport News (PHF)	183,000	\$8,970,194	108,991	\$45,405
Peer Market Average	210,077	\$9,241,514	119,252	\$39,064
Non-Hub Average	180,001	\$7,050,325	97,649	\$41,113

# Newport News (PHF)

## Average Seats per Departure - Domestic

Average Seats per Departure – Peer Market



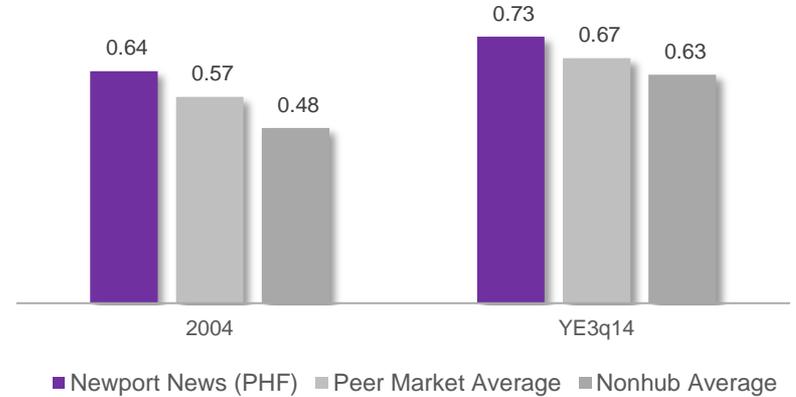
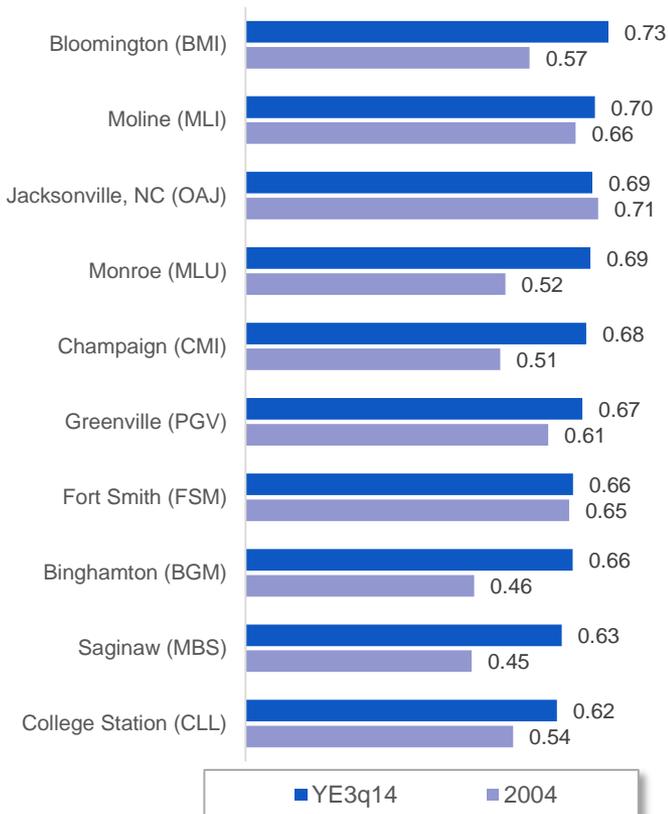
Rank	Top 10 Non-Hub Airports	Average Seats per Departure – YE3q14
1	Portsmouth, NH (PSM)	170
2	Rockford, IL (RFD)	168
3	Latrobe, PA (LBE)	157
4	Bullhead City, AZ (IFP)	143
5	Trenton, NJ (TTN)	138
6	Vail/Eagle, CO (EGE)	123
7	Daytona Beach, FL (DAB)	122
8	Jackson Hole, WY (JAC)	112
9	Melbourne, FL (MLB)	107
10	Harlingen, TX (HRL)	102
66	Newport News (PHF)	53

Note: There were 261 Non-Hub airports as of April 2015

# Newport News (PHF)

## Average O&D Traffic per Seat - Domestic

Average O&D Traffic per Seat- Peer Market



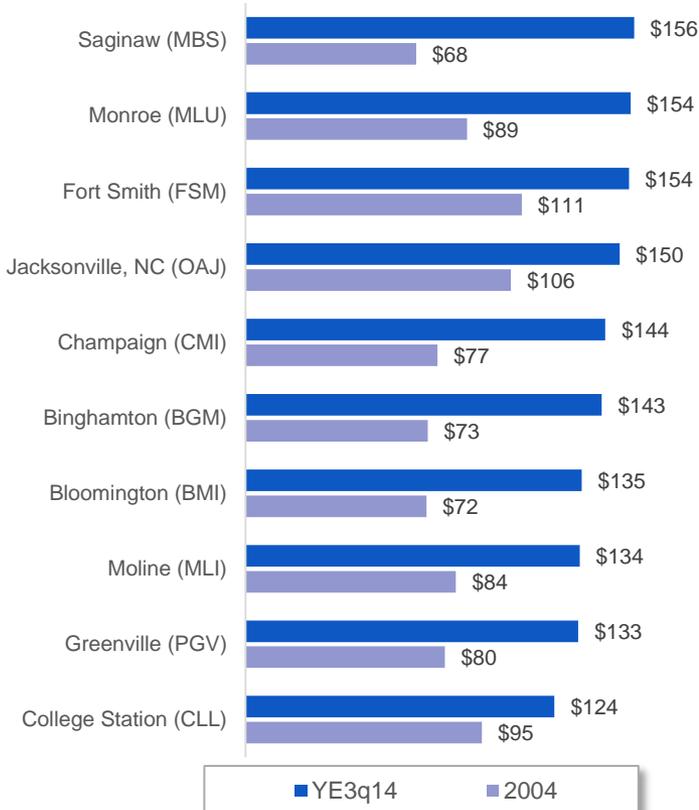
Rank	Top 10 Non-Hub Airports	Average OD Traffic per Seat – YE3q14
1	Rockford, IL (RFD)	0.93
2	Trenton, NJ (TTN)	0.90
3	Portsmouth, NH (PSM)	0.86
4	Latrobe, PA (LBE)	0.85
5	Daytona Beach, FL (DAB)	0.82
6	Newburgh, NY (SWF)	0.82
7	Grand Forks, ND (GFK)	0.80
8	Kalispell-Glacier, MT (FCA)	0.80
9	Toledo, OH (TOL)	0.80
10	Missoula, MT (MSO)	0.79
29	Newport News (PHF)	0.73

Note: There were 261 Non-Hub airports as of April 2015

# Newport News (PHF)

## Average O&D Revenue per Seat - Domestic

Average O&D Revenue per Seat– Peer Market



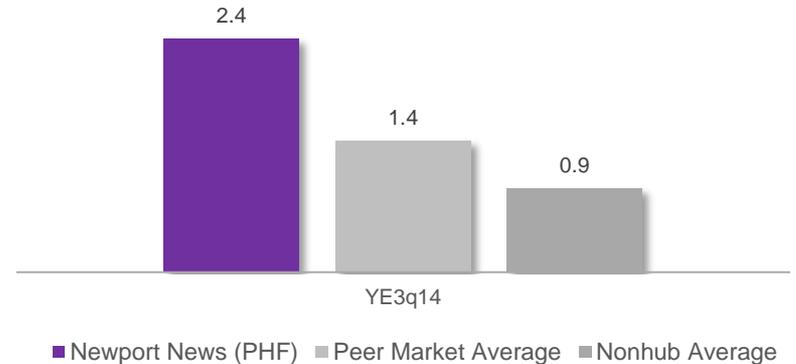
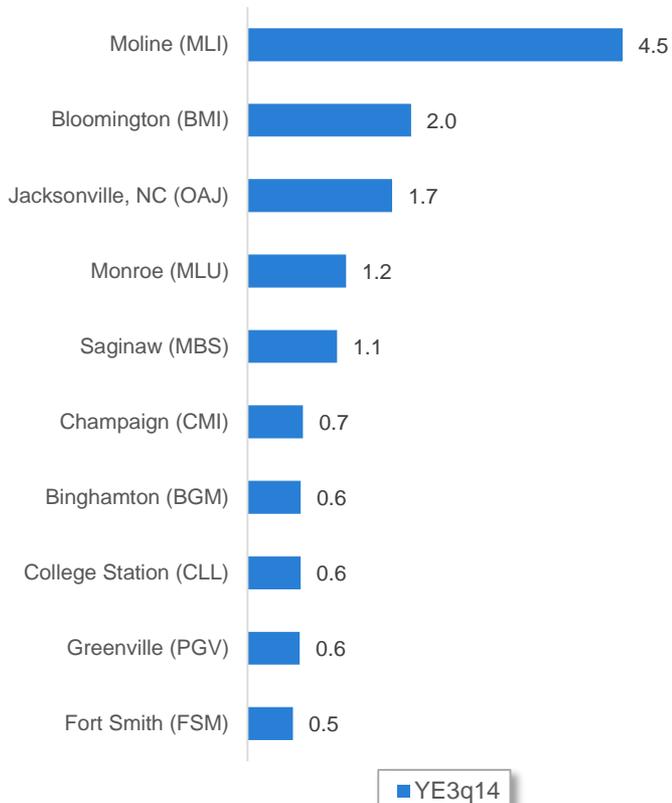
Rank	Top 10 Non-Hub Airports	Average OD Revenue per Seat – YE3q14
1	Dothan, AL (DHN)	\$197.6
2	Minot, ND (MOT)	\$197.3
3	Bakersfield, CA (BFL)	\$184.5
4	Jackson Hole, WY (JAC)	\$184.2
5	Marquette, MI (MQT)	\$183.9
6	Columbus, MS (GTR)	\$181.7
7	Elko, NV (EKO)	\$181.6
8	Dickinson, ND (DIK)	\$181.5
9	Bismarck, ND (BIS)	\$178.7
10	Kalispell-Glacier, MT (FCA)	\$178.2
59	Newport News (PHF)	\$151.8

Note: There were 261 Non-Hub airports as of April 2015

# Newport News (PHF)

## Average O&D Traffic per Capita - Domestic

### Average O&D Traffic per Capita – Peer Market



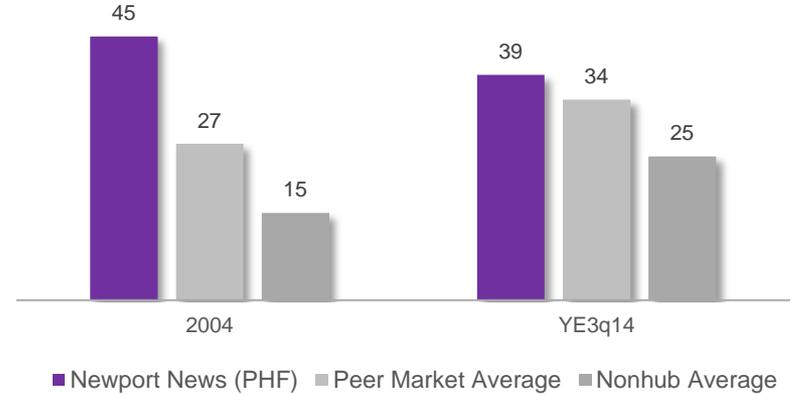
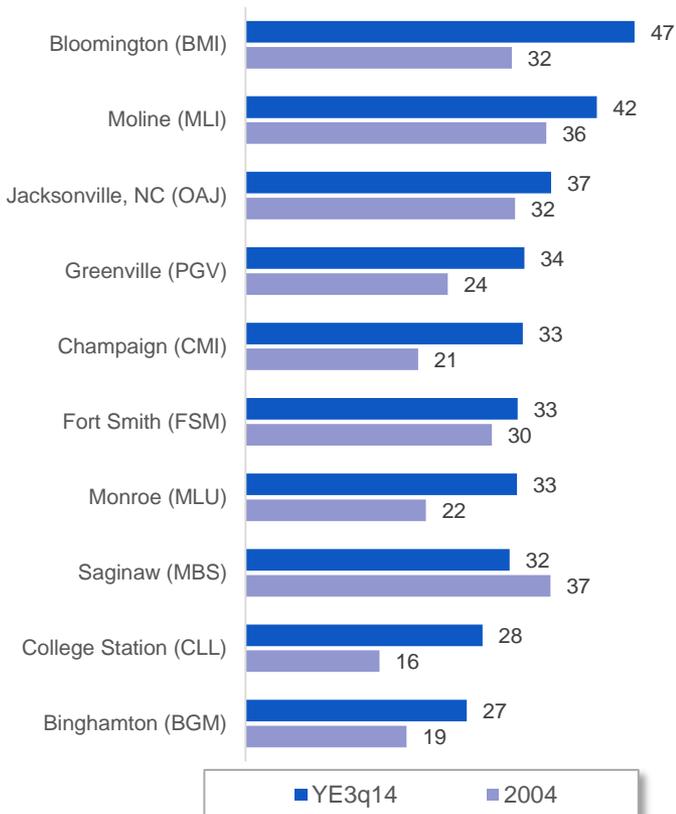
Rank	Top 10 Non-Hub Airports	Average OD Traffic per Capita – YE3q14
1	Jackson Hole, WY (JAC)	16.57
2	Durango, CO (DRO)	6.50
3	Minot, ND (MOT)	5.75
4	Vail/Eagle, CO (EGE)	5.38
5	Missoula, MT (MSO)	5.38
6	Martha's Vineyard, MA (MVY)	5.36
7	Steamboat Springs/Hayden, CO (HDN)	4.59
8	Great Falls, MT (GTF)	4.52
9	Kalispell-Glacier, MT (FCA)	4.37
10	Hailey-Sun Valley, ID (SUN)	4.20
25	Newport News (PHF)	2.41

Note: There were 261 Non-Hub airports as of April 2015

# Newport News (PHF)

## Average O&D Traffic per Flight - Domestic

Average O&D Traffic per Flight – Peer Market



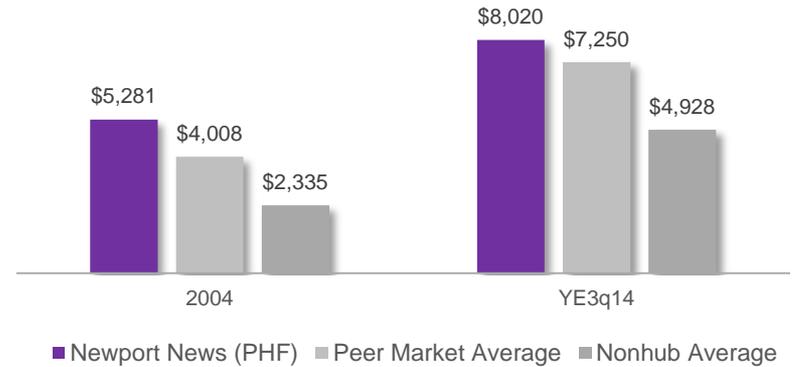
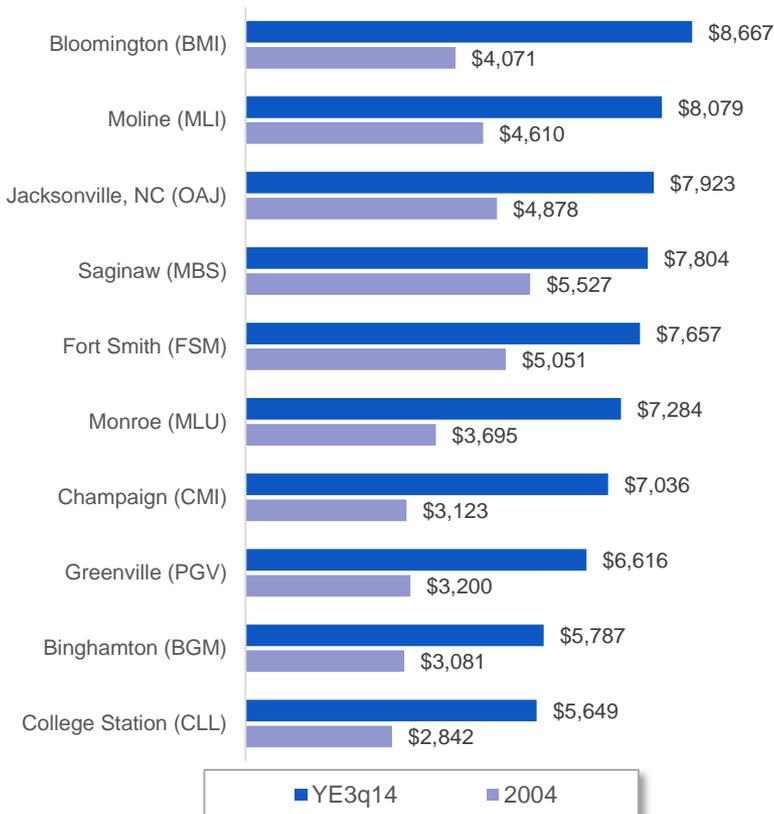
Rank	Top 10 Non-Hub Airports	Average OD Traffic per Flight – YE3q14
1	Rockford, IL (RFD)	156.2
2	Portsmouth, NH (PSM)	145.7
3	Latrobe, PA (LBE)	133.8
4	Trenton, NJ (TTN)	123.8
5	Daytona Beach, FL (DAB)	100.0
6	Melbourne, FL (MLB)	84.4
7	Jackson Hole, WY (JAC)	77.9
8	Vail/Eagle, CO (EGE)	74.9
9	McAllen, TX (MFE)	70.2
10	Harlingen, TX (HRL)	70.0
57	Newport News (PHF)	38.7

Note: There were 261 Non-Hub airports as of April 2015

# Newport News (PHF)

## Average O&D Revenue per Flight - Domestic

### Average O&D Revenue per Flight – Peer Market



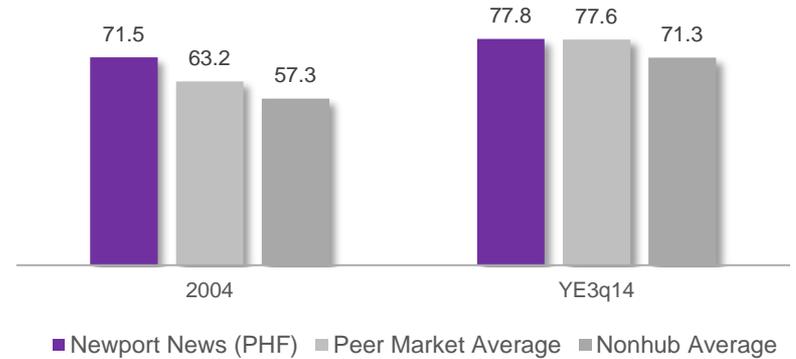
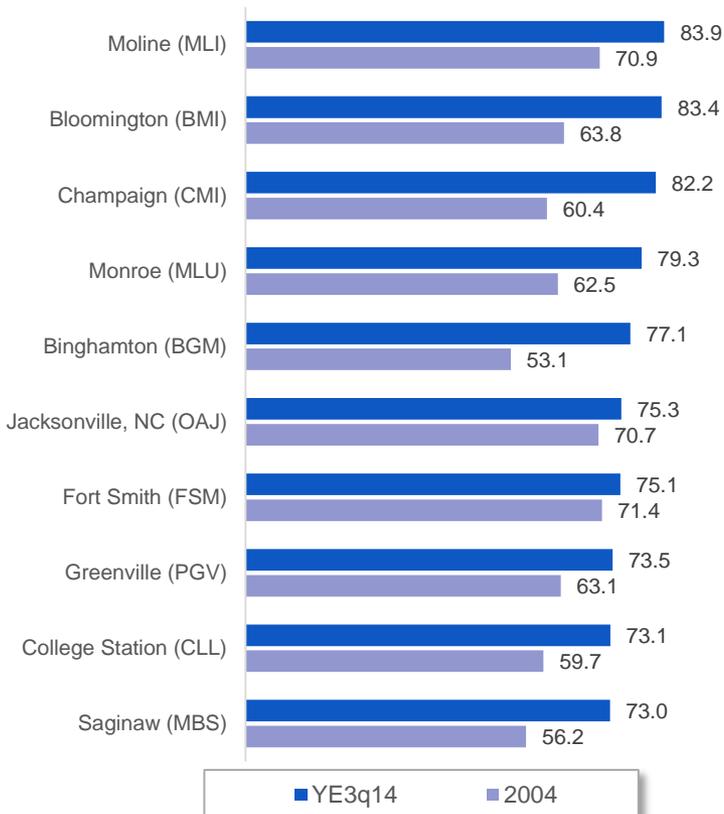
Rank	Top 10 Non-Hub Airports	Average OD Revenue per Flight – YE3q14
1	Jackson Hole, WY (JAC)	\$20,621
2	Vail/Eagle, CO (EGE)	\$19,231
3	Daytona Beach, FL (DAB)	\$17,436
4	Rockford, IL (RFD)	\$16,956
5	Melbourne, FL (MLB)	\$15,018
6	McAllen, TX (MFE)	\$13,979
7	Minot, ND (MOT)	\$13,859
8	Kalispell-Glacier, MT (FCA)	\$12,987
9	Steamboat Springs/Hayden, CO (HDN)	\$12,764
10	Portsmouth, NH (PSM)	\$12,419
66	Newport News (PHF)	\$8,020

Note: There were 261 Non-Hub airports as of April 2015

# Newport News (PHF)

## Average Load Factor % - Domestic

### Average Domestic Load Factor % – Peer Market

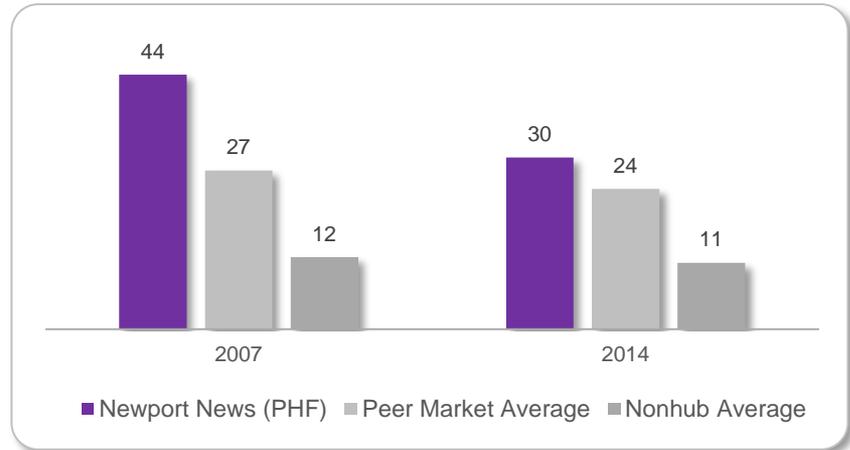
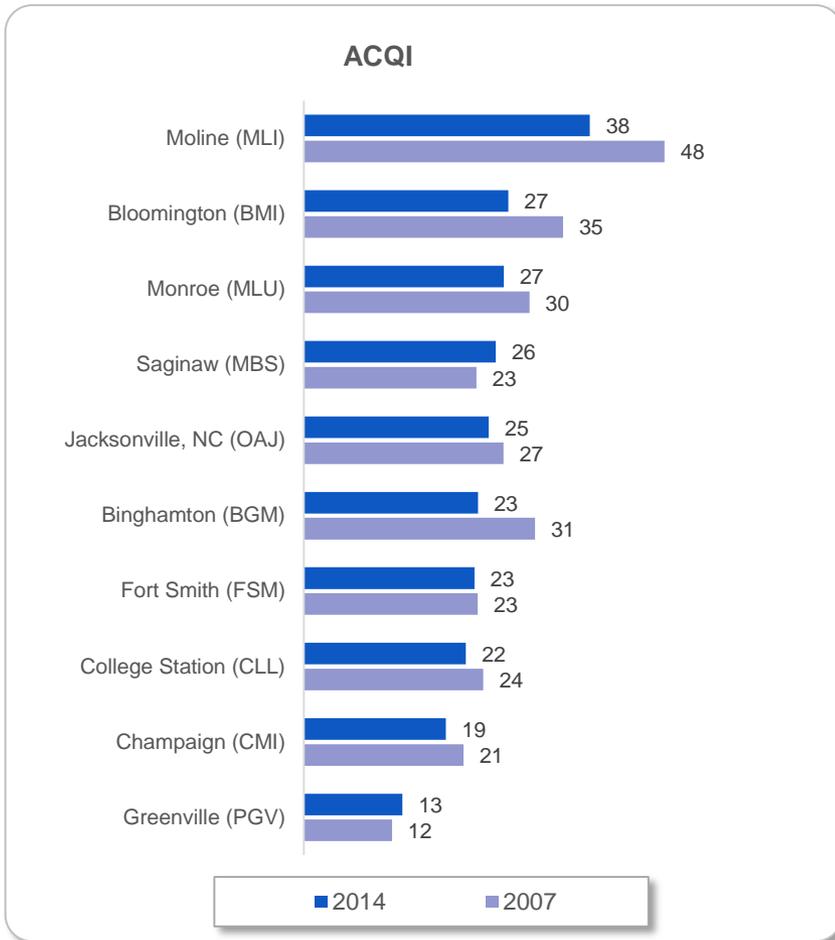


Rank	Top 10 Non-Hub Airports	Average Load Factor % – YE3q14
1	Rockford, IL (RFD)	91.8
2	Trenton, NJ (TTN)	90.1
3	Toledo, OH (TOL)	89.1
4	Portsmouth, NH (PSM)	87.9
5	Daytona Beach, FL (DAB)	87.7
6	South Bend, IN (SBN)	87.5
7	Newburgh, NY (SWF)	86.7
8	Hagerstown, MD (HGR)	86.5
9	Fort Wayne, IN (FWA)	86.3
10	Latrobe, PA (LBE)	86.0
70	Newport News (PHF)	77.8

Note: There were 261 Non-Hub airports as of April 2015

# Newport News (PHF)

## Airport Connectivity Quality Index - ACQI



Rank	Top 10 Non-Hub Airports	ACQI - 2014
1	Charleston, WV (CRW)	38.7
2	Tallahassee, FL (TLH)	38.4
3	Mobile, AL (MOB)	37.9
4	Roanoke, VA (ROA)	37.5
5	Shreveport, LA (SHV)	37.0
6	Lafayette, LA (LFT)	35.7
7	Peoria, IL (PIA)	35.7
8	Fort Wayne, IN (FWA)	35.6
9	Chattanooga, TN (CHA)	35.3
10	Green Bay, WI (GRB)	35.2
32	Newport News (PHF)	29.5

Note: There were 261 Non-Hub airports as of April 2015

# Norfolk

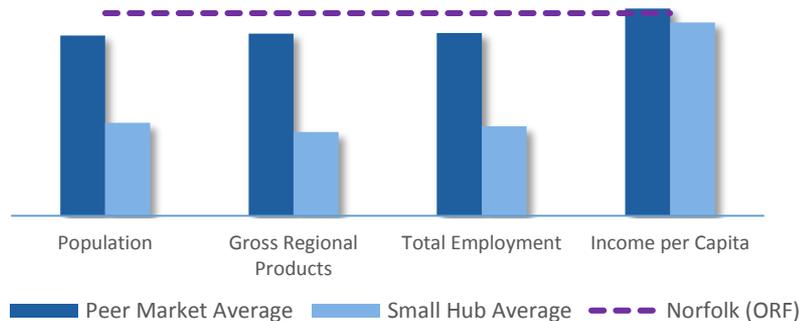
---

# Norfolk (ORF)

## Peer Markets for Norfolk



Norfolk compared with peer market and small hub average in key demographic & economic indicators



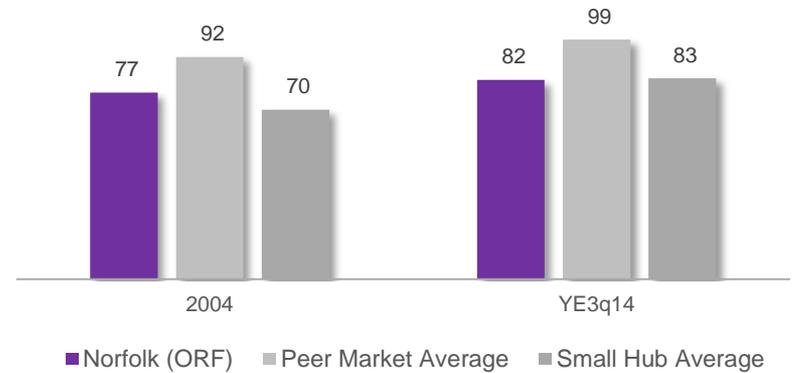
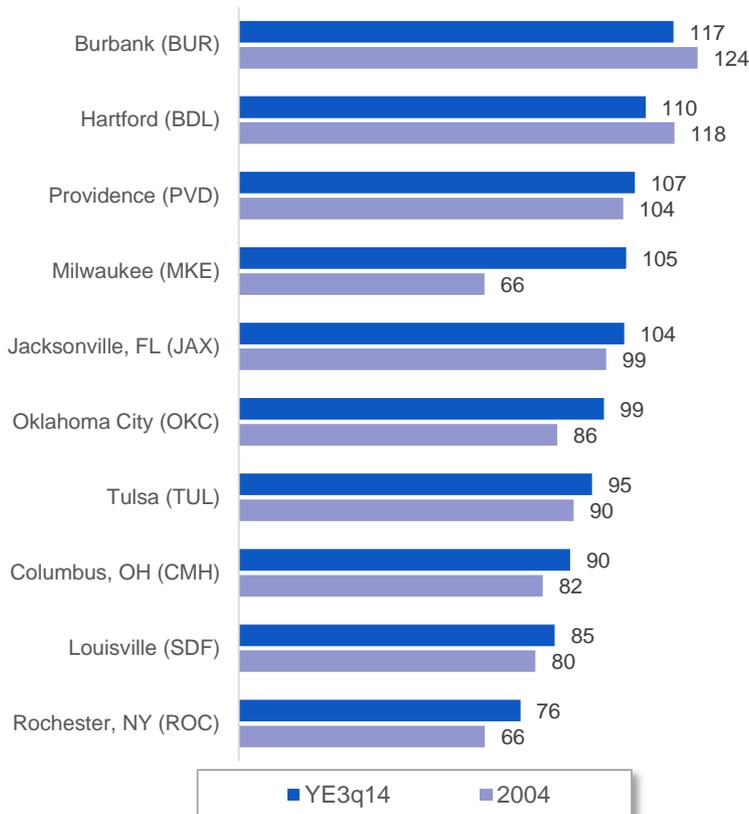
## 2014 Demographic & Economic Figures

Peer Market	Population	Gross Regional Products	Total Employment	Income per Capita
Hartford (BDL)	1,237,475	\$80,573,053	813,961	\$57,253
Burbank (BUR)	1,212,450	\$66,234,600	703,183	\$48,233
Columbus, OH (CMH)	1,994,055	\$98,560,847	1,262,576	\$43,333
Jacksonville, FL (JAX)	1,432,523	\$66,111,368	836,775	\$44,317
Milwaukee (MKE)	1,592,893	\$86,156,812	1,008,607	\$48,357
Oklahoma City (OKC)	1,317,458	\$61,605,661	816,949	\$43,352
Providence (PVD)	1,630,972	\$68,972,867	880,835	\$46,594
Rochester, NY (ROC)	1,090,229	\$48,854,632	651,111	\$45,161
Louisville (SDF)	1,271,024	\$58,782,836	759,906	\$42,430
Tulsa (TUL)	970,026	\$45,198,953	581,448	\$45,706
Norfolk (ORF)	1,546,061	\$75,783,971	920,802	\$45,405
Peer Market Average	1,374,911	\$68,105,163	831,535	\$46,474
Small Hub Average	710,019	\$31,420,769	406,835	\$43,350

# Norfolk (ORF)

## Average Seats per Departure - Domestic

Average Seats per Departure – Peer Market



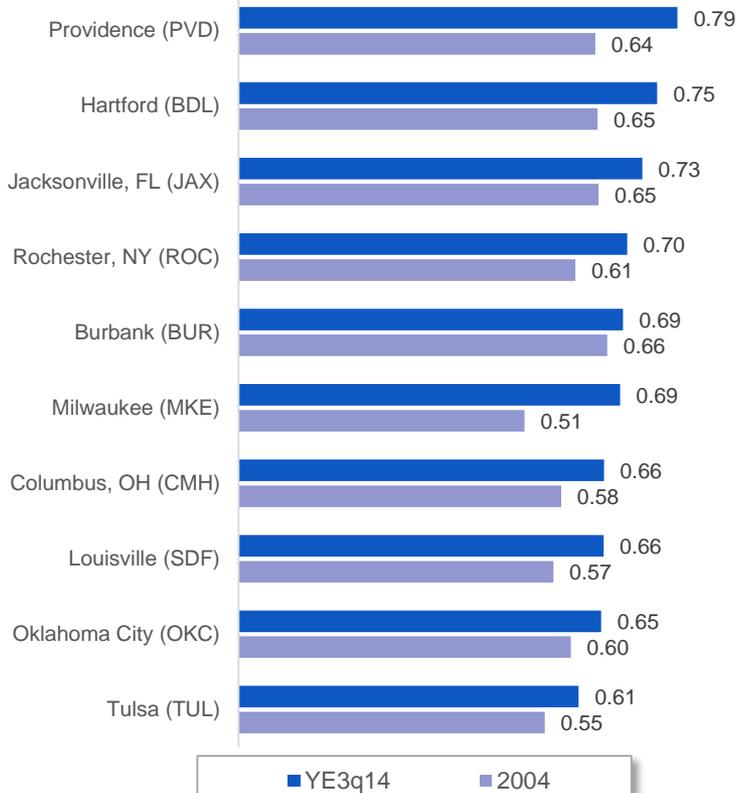
Rank	Top 10 Small Hub Airports	Average Seats per Departure – YE3q14
1	Sanford (SFB)	169
2	Tampa (PIE)	167
3	Atlantic City (ACY)	156
4	Bellingham (BLI)	129
5	Long Beach (LGB)	127
6	Sarasota/Bradenton (SRQ)	124
7	Long Island Islip (ISP)	112
8	Reno (RNO)	111
9	Myrtle Beach (MYR)	111
10	Spokane (GEG)	110
28	Norfolk (ORF)	82

Note: There were 71 Small Hub airports as of April 2015

# Norfolk (ORF)

## Average O&D Traffic per Seat - Domestic

Average O&D Traffic per Seat- Peer Market



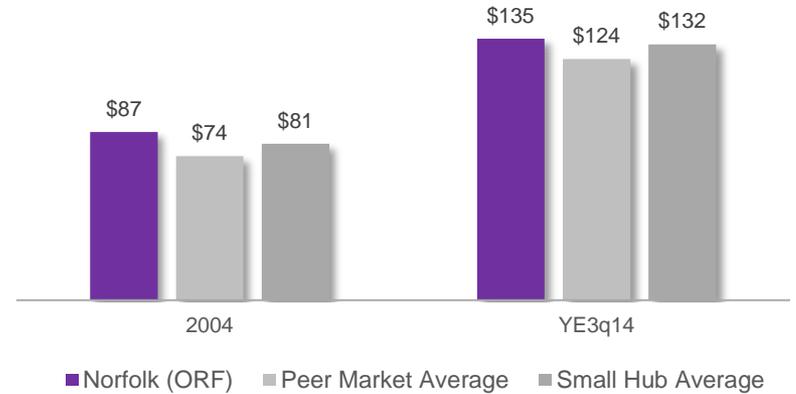
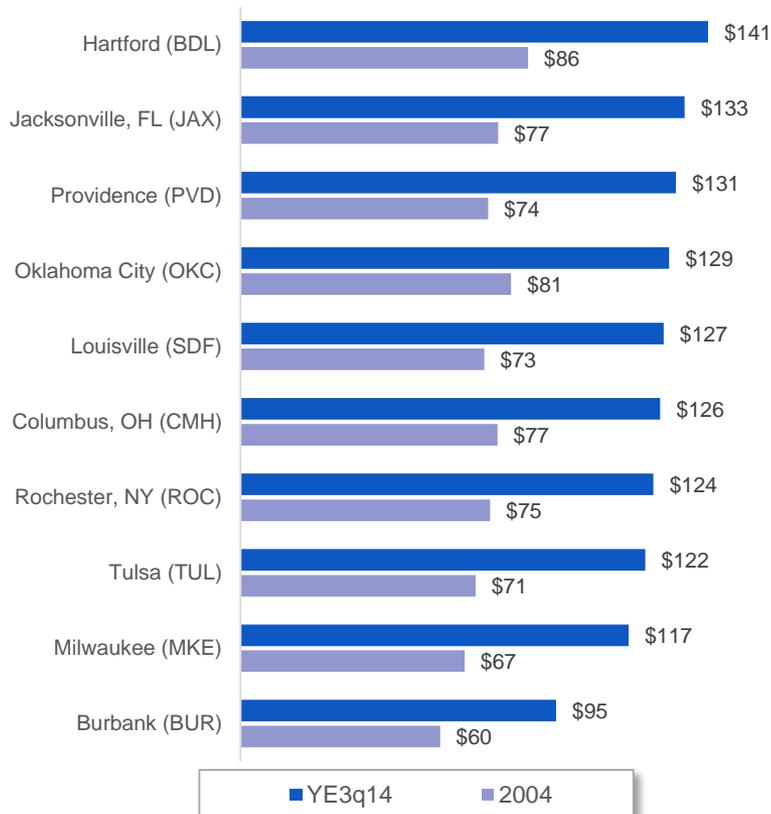
Rank	Top 10 Small Hub Airports	Average OD Traffic per Seat – YE3q14
1	Sanford (SFB)	0.87
2	Tampa (PIE)	0.86
3	Atlantic City (ACY)	0.82
4	Bellingham (BLI)	0.81
5	Long Island Macarthur (ISP)	0.80
6	Manchester, ME (MHT)	0.79
7	Providence (PVD)	0.79
8	Long Beach (LGB)	0.79
9	Sarasota/Bradenton (SRQ)	0.79
10	Bozeman (BZN)	0.77
51	Norfolk (ORF)	0.67

Note: There were 71 Small Hub airports as of April 2015

# Norfolk (ORF)

## Average O&D Revenue per Seat - Domestic

Average O&D Revenue per Seat– Peer Market



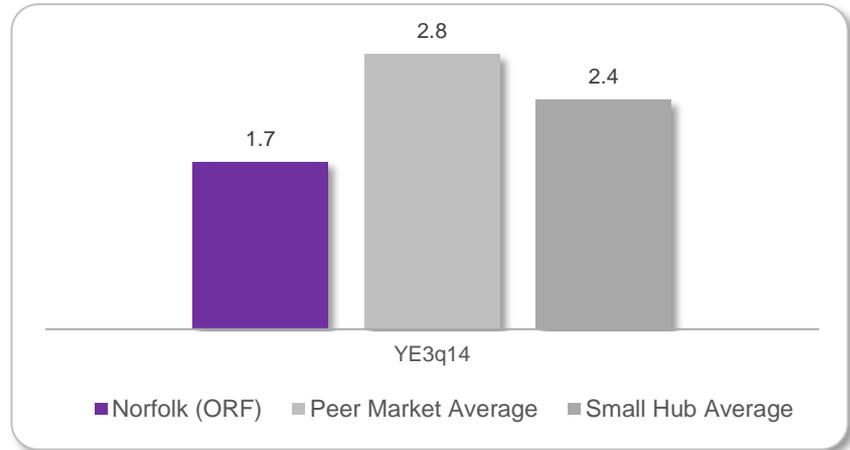
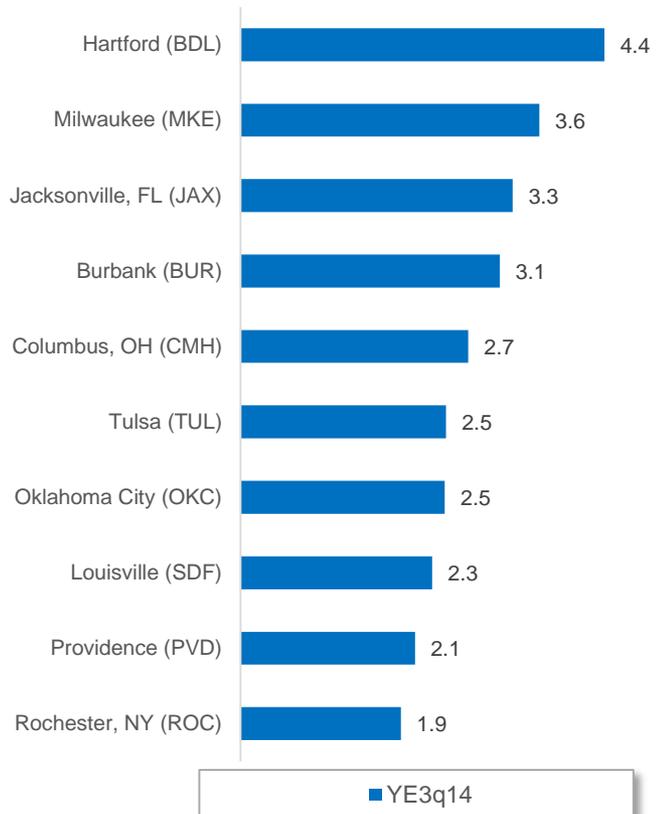
Rank	Top 10 Small Hub Airports	Average OD Revenue per Seat – YE3q14
1	Bozeman (BZN)	\$168.1
2	Fargo (FAR)	\$156.9
3	Billings (BIL)	\$155.7
4	Key West (EYW)	\$155.1
5	Harrisburg (MDT)	\$152.6
6	Madison (MSN)	\$151.3
7	Portland, ME (PWM)	\$151.1
8	Columbia, SC (CAE)	\$151.0
9	Fayetteville, AR (XNA)	\$150.4
10	Jackson, MS (JAN)	\$150.3
32	Norfolk (ORF)	\$134.7

Note: There were 71 Small Hub airports as of April 2015

# Norfolk (ORF)

## Average O&D Traffic per Capita - Domestic

### Average O&D Traffic per Capita – Peer Market



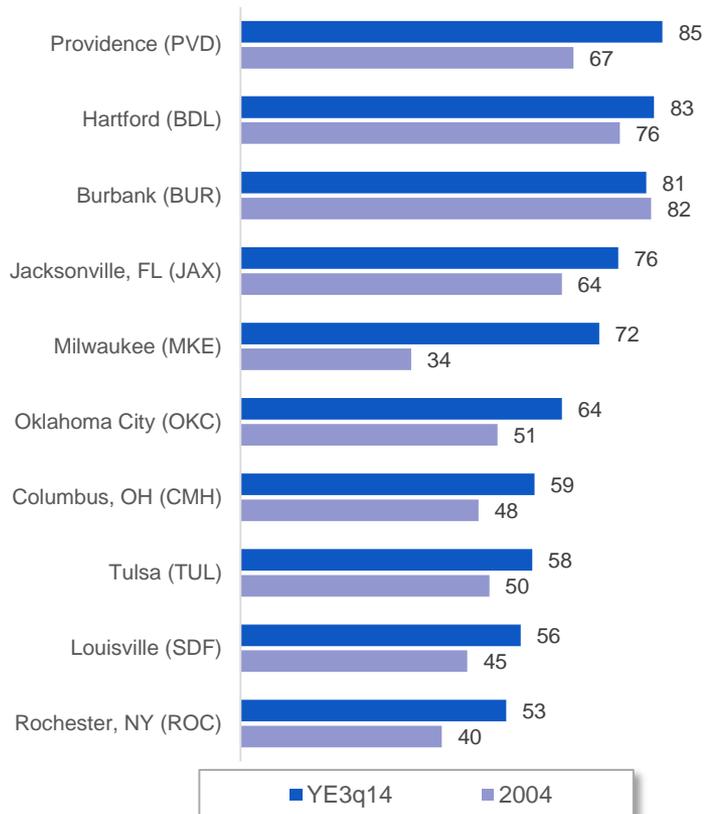
Rank	Top 10 Small Hub Airports	Average OD Traffic per Capita – YE3q14
1	Key West (EYW)	10.00
2	Bozeman (BZN)	8.88
3	Midland/odessa (MAF)	6.58
4	Reno (RNO)	6.55
5	Burlington, VT (BTV)	5.05
6	Manchester, ME (MHT)	4.98
7	Spokane (GEG)	4.97
8	Bellingham (BLI)	4.85
9	Billings (BIL)	4.64
10	Moline (MLI)	4.51
52	Norfolk (ORF)	1.72

Note: There were 71 Small Hub airports as of April 2015

# Norfolk (ORF)

## Average O&D Traffic per Flight - Domestic

### Average O&D Traffic per Flight – Peer Market



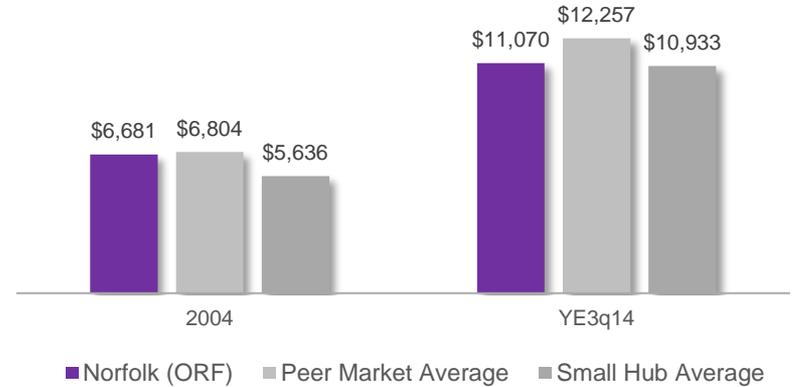
Rank	Top 10 Small Hub Airports	Average OD Traffic per Flight – YE3q14
1	Sanford (SFB)	147.1
2	Tampa (PIE)	142.8
3	Atlantic City (ACY)	127.8
4	Bellingham (BLI)	104.8
5	Long Beach (LGB)	100.3
6	Sarasota/Bradenton (SRQ)	97.7
7	Long Island Islip (ISP)	89.0
8	Providence (PVD)	84.5
9	Spokane (GEG)	83.0
10	Myrtle Beach (MYR)	82.1
32	Norfolk (ORF)	55.2

Note: There were 71 Small Hub airports as of April 2015

# Norfolk (ORF)

## Average O&D Revenue per Flight - Domestic

### Average O&D Revenue per Flight – Peer Market



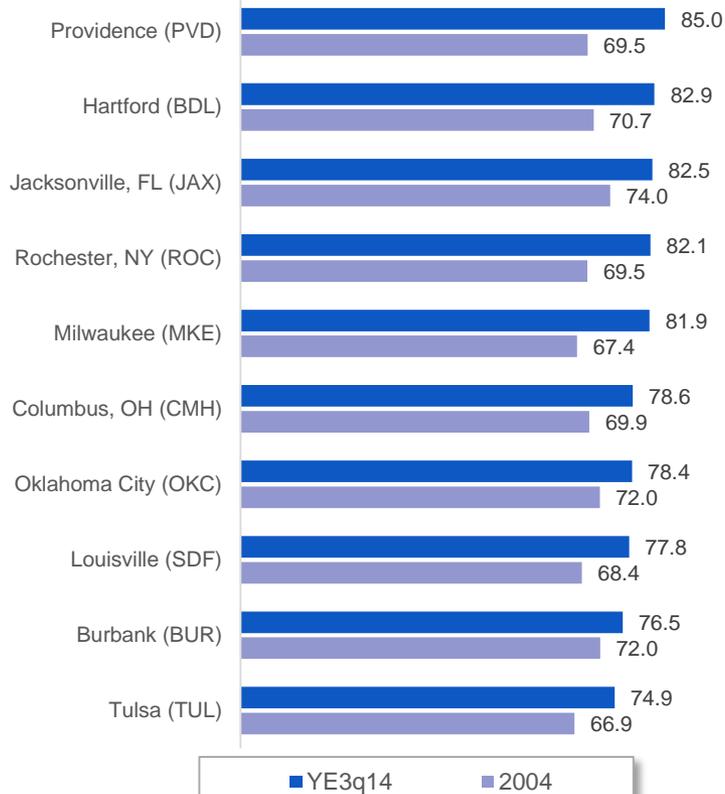
Rank	Top 10 Small Hub Airports	Average OD Revenue per Flight – YE3q14
1	Sarasota/Bradenton (SRQ)	\$17,917
2	Bozeman (BZN)	\$15,057
3	Spokane (GEG)	\$14,504
4	Providence (PVD)	\$13,992
5	Tucson (TUS)	\$13,725
6	Reno (RNO)	\$13,598
7	Pensacola (PNS)	\$12,862
8	Bellingham (BLI)	\$12,532
9	Manchester, ME (MHT)	\$12,440
10	Long Beach (LGB)	\$12,362
26	Norfolk (ORF)	\$11,070

Note: There were 71 Small Hub airports as of April 2015

# Norfolk (ORF)

## Average Load Factor % - Domestic

### Average Domestic Load Factor % – Peer Market

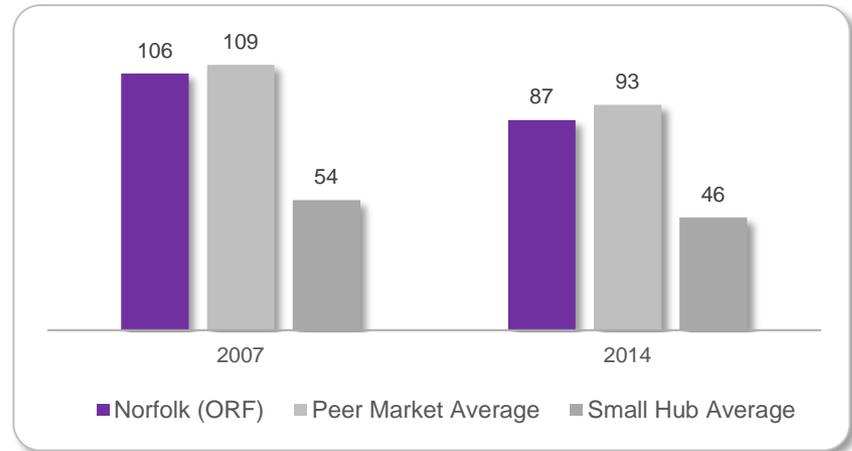
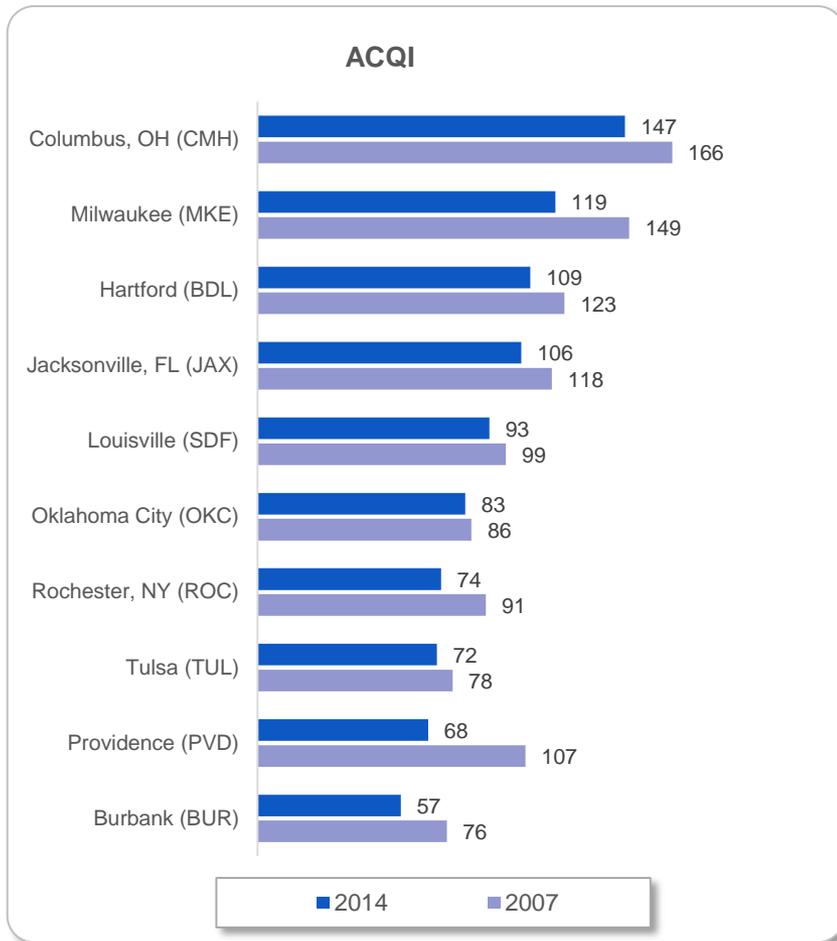


Rank	Top 10 Small Hub Airports	Average Load Factor % – YE3q14
1	Tampa (PIE)	89.0
2	Sanford (SFB)	88.5
3	Springfield, MO (SGF)	87.5
4	Cedar Rapids (CID)	86.7
5	Bellingham (BLI)	86.1
6	Long Beach (LGB)	86.0
7	Atlantic City (ACY)	85.7
8	Fresno (FAT)	85.4
9	Fargo (FAR)	85.4
10	Manchester, ME (MHT)	85.2
38	Norfolk (ORF)	80.8

Note: There were 71 Small Hub airports as of April 2015

# Norfolk (ORF)

## Airport Connectivity Quality Index - ACQI



Rank	Top 10 Small Hub Airports	ACQI - 2014
1	Richmond (RIC)	96.2
2	Louisville (SDF)	92.8
3	Memphis (MEM)	87.4
4	Norfolk (ORF)	86.7
5	Charleston, SC (CHS)	83.7
6	Rochester, NY (ROC)	73.6
7	Dayton (DAY)	72.1
8	Tulsa (TUL)	71.9
9	Tucson (TUS)	70.9
10	Syracuse (SYR)	70.6

Note: There were 71 Small Hub airports as of April 2015

# Richmond

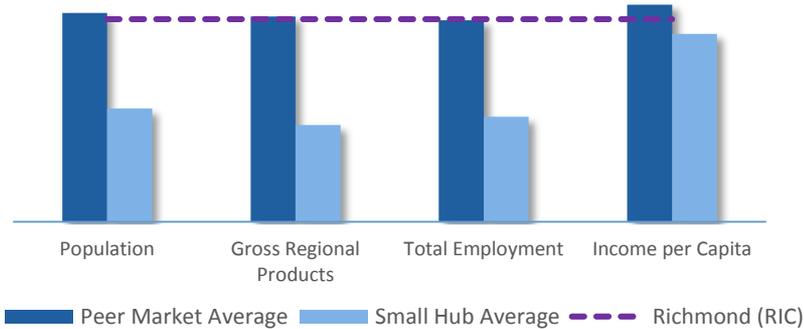
---

# Richmond (RIC)

## Peer Markets for Richmond



Richmond compared with peer market and small hub average in key demographic & economic indicators



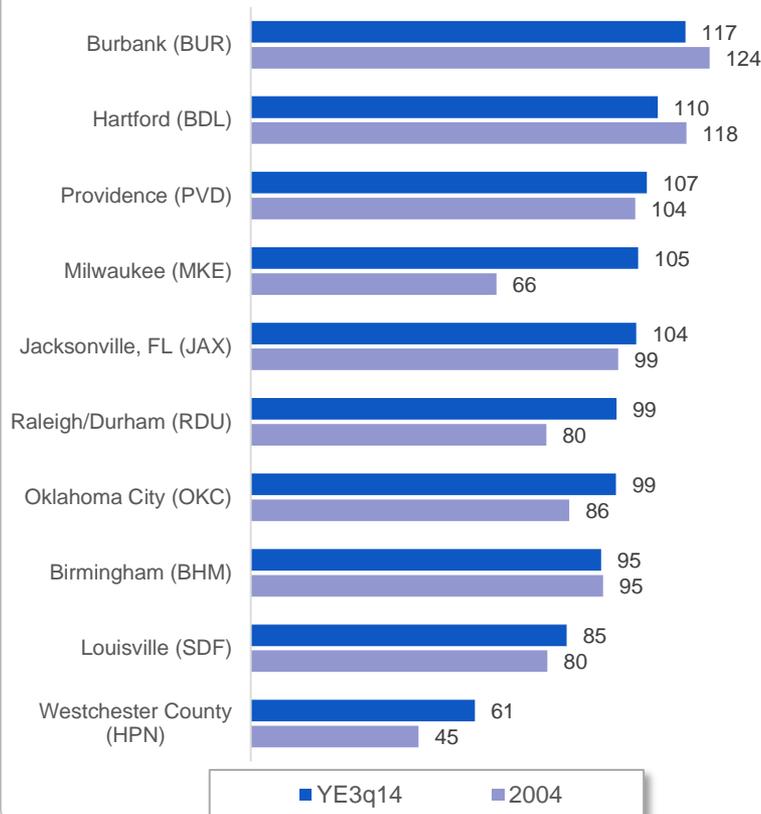
## 2014 Demographic & Economic Figures

Peer Market	Population	Gross Regional Products	Total Employment	Income per Capita
Hartford (BDL)	1,237,475	\$80,573,053	813,961	\$57,253
Birmingham (BHM)	1,161,664	\$52,531,629	670,740	\$44,126
Burbank (BUR)	1,212,450	\$66,234,600	703,183	\$48,233
Westchester County (HPN)	964,221	\$63,295,540	595,643	\$82,305
Jacksonville, FL (JAX)	1,432,523	\$66,111,368	836,775	\$44,317
Milwaukee (MKE)	1,592,893	\$86,156,812	1,008,607	\$48,357
Oklahoma City (OKC)	1,317,458	\$61,605,661	816,949	\$43,352
Providence (PVD)	1,630,972	\$68,972,867	880,835	\$46,594
Raleigh/Durham (RDU)	1,251,398	\$62,304,686	714,662	\$43,877
Louisville (SDF)	1,271,024	\$58,782,836	759,906	\$42,430
Richmond (RIC)	1,268,498	\$65,745,832	784,403	\$46,737
Peer Market Average	1,307,208	\$66,656,905	780,126	\$50,084
Small Hub Average	710,019	\$31,420,769	406,835	\$43,350

# Richmond (RIC)

## Average Seats per Departure - Domestic

Average Seats per Departure – Peer Market



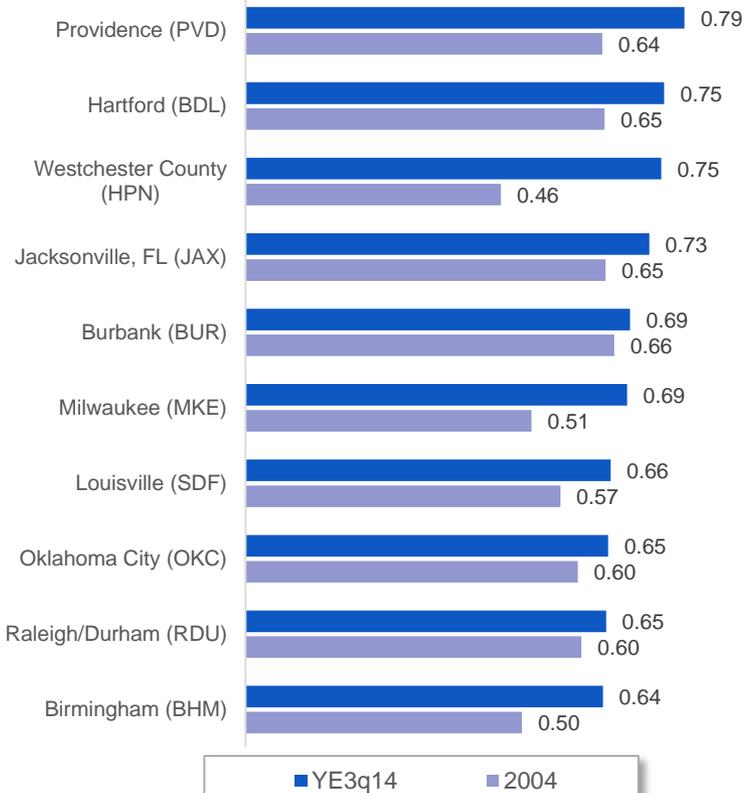
Rank	Top 10 Small Hub Airports	Average Seats per Departure – YE3q14
1	Sanford (SFB)	169
2	Tampa (PIE)	167
3	Atlantic City (ACY)	156
4	Bellingham (BLI)	129
5	Long Beach (LGB)	127
6	Sarasota/Bradenton (SRQ)	124
7	Long Island Islip (ISP)	112
8	Reno (RNO)	111
9	Myrtle Beach (MYR)	111
10	Spokane (GEG)	110
34	Richmond (RIC)	80

Note: There were 71 Small Hub airports as of April 2015

# Richmond (RIC)

## Average O&D Traffic per Seat - Domestic

Average O&D Traffic per Seat- Peer Market



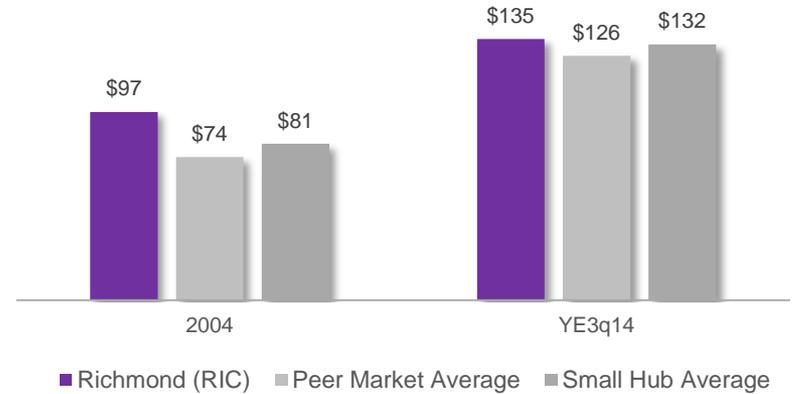
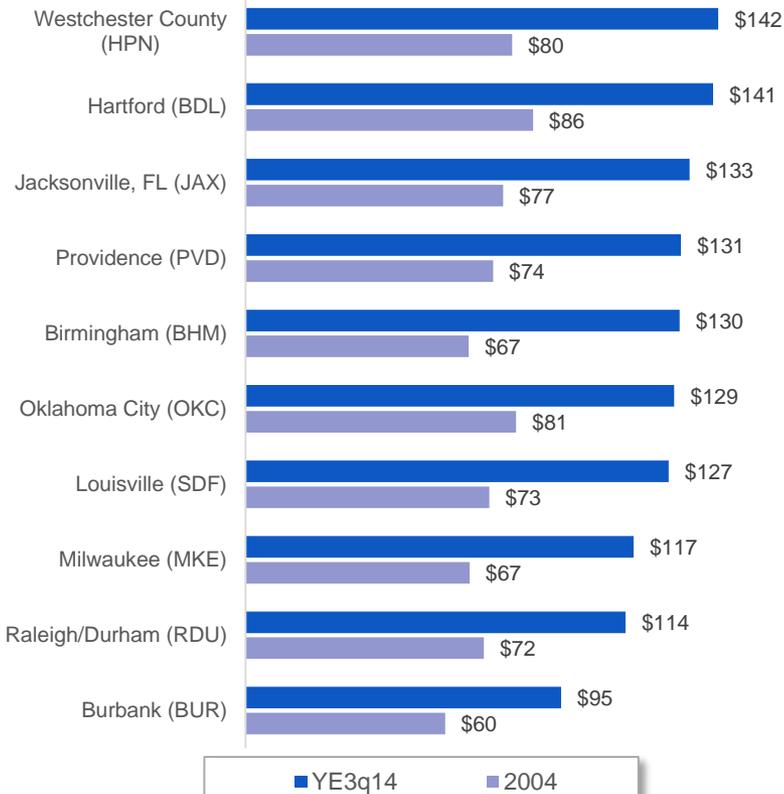
Rank	Top 10 Small Hub Airports	Average OD Traffic per Seat – YE3q14
1	Sanford (SFB)	0.87
2	Tampa (PIE)	0.86
3	Atlantic City (ACY)	0.82
4	Bellingham (BLI)	0.81
5	Long Island Macarthur (ISP)	0.80
6	Manchester, ME (MHT)	0.79
7	Providence (PVD)	0.79
8	Long Beach (LGB)	0.79
9	Sarasota/Bradenton (SRQ)	0.79
10	Bozeman (BZN)	0.77
48	Richmond (RIC)	0.68

Note: There were 71 Small Hub airports as of April 2015

# Richmond (RIC)

## Average O&D Revenue per Seat - Domestic

### Average O&D Revenue per Seat– Peer Market



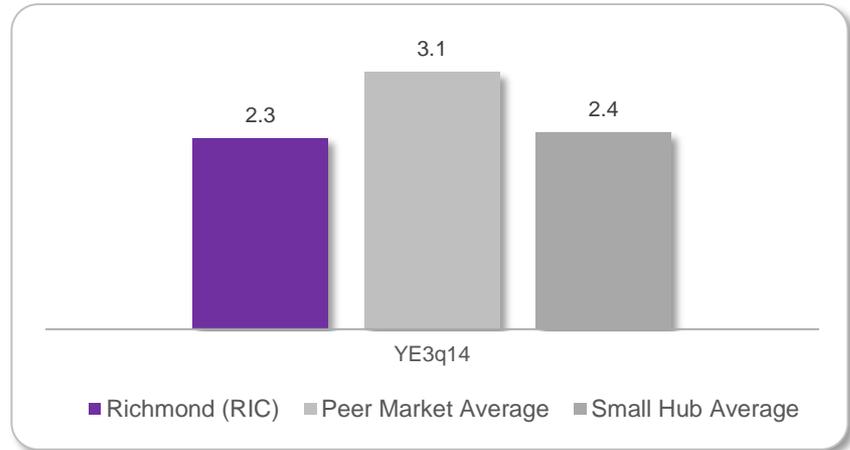
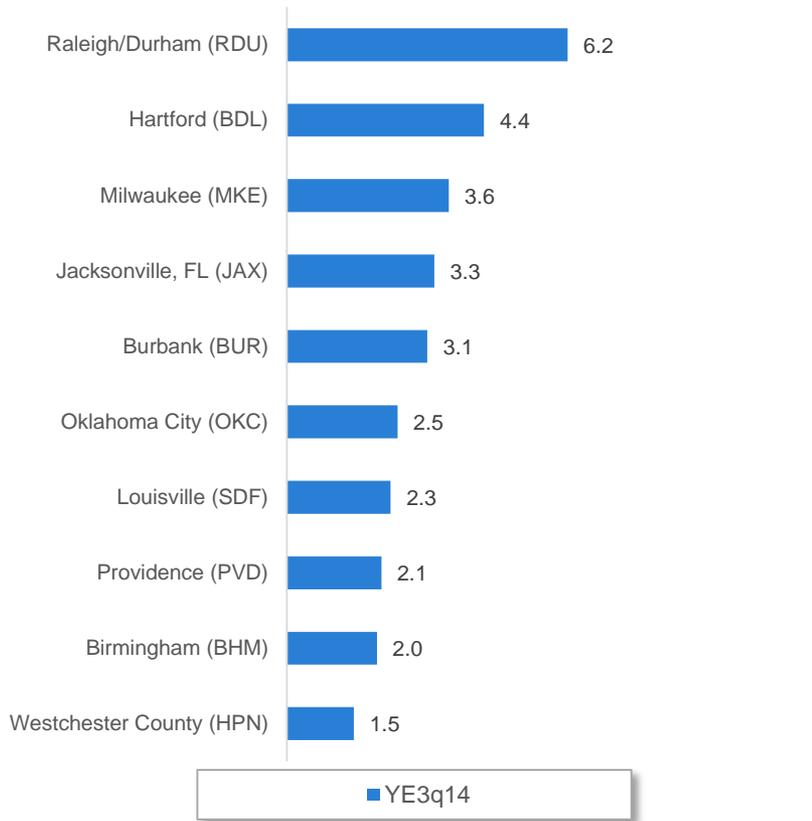
Rank	Top 10 Small Hub Airports	Average OD Revenue per Seat – YE3q14
1	Bozeman (BZN)	\$168.1
2	Fargo (FAR)	\$156.9
3	Billings (BIL)	\$155.7
4	Key West (EYW)	\$155.1
5	Harrisburg (MDT)	\$152.6
6	Madison (MSN)	\$151.3
7	Portland, ME (PWM)	\$151.1
8	Columbia, SC (CAE)	\$151.0
9	Fayetteville, AR (XNA)	\$150.4
10	Jackson, MS (JAN)	\$150.3
33	Richmond (RIC)	\$134.7

Note: There were 71 Small Hub airports as of April 2015

# Richmond (RIC)

## Average O&D Traffic per Capita - Domestic

### Average O&D Traffic per Capita – Peer Market



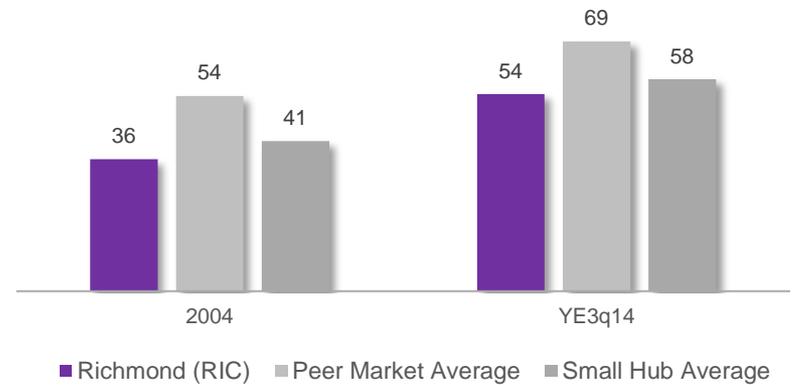
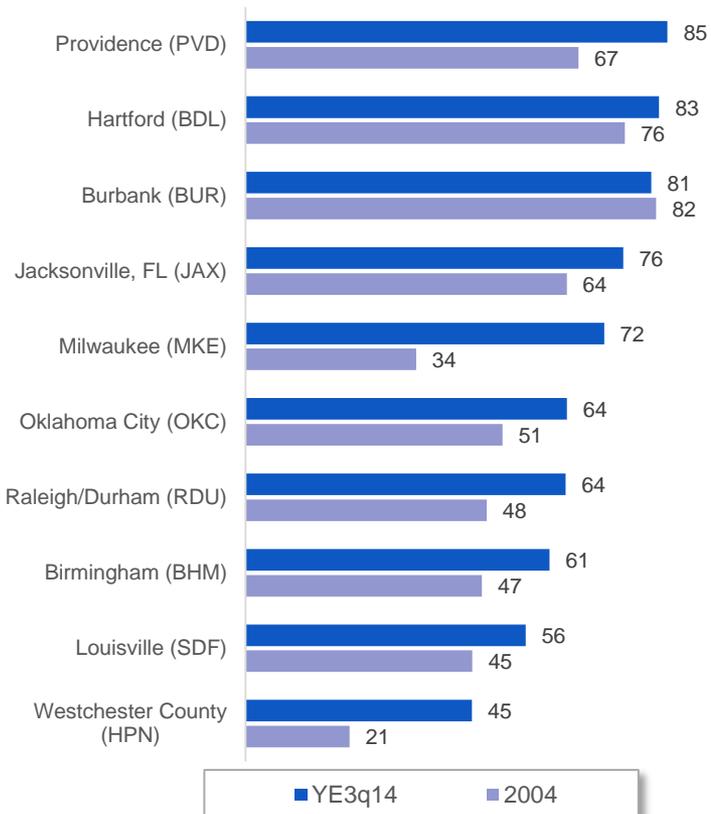
Rank	Top 10 Small Hub Airports	Average OD Traffic per Capita – YE3q14
1	Key West (EYW)	10.00
2	Bozeman (BZN)	8.88
3	Midland/odessa (MAF)	6.58
4	Reno (RNO)	6.55
5	Burlington, VT (BTV)	5.05
6	Manchester, ME (MHT)	4.98
7	Spokane (GEG)	4.97
8	Bellingham (BLI)	4.85
9	Billings (BIL)	4.64
10	Moline (MLI)	4.51
35	Richmond (RIC)	2.29

Note: There were 71 Small Hub airports as of April 2015

# Richmond (RIC)

## Average O&D Traffic per Flight - Domestic

### Average O&D Traffic per Flight – Peer Market



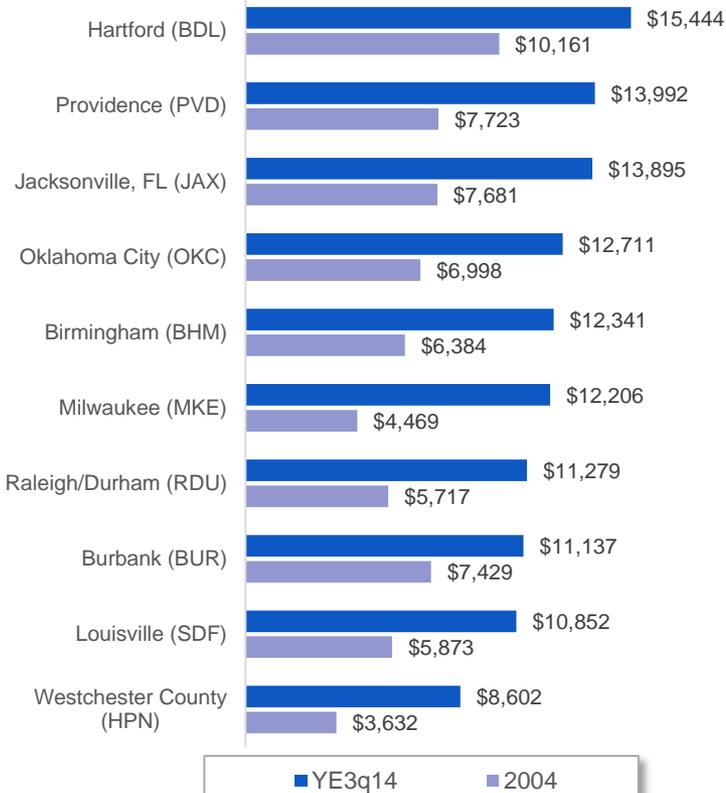
Rank	Top 10 Small Hub Airports	Average OD Traffic per Flight – YE3q14
1	Sanford (SFB)	147.1
2	Tampa (PIE)	142.8
3	Atlantic City (ACY)	127.8
4	Bellingham (BLI)	104.8
5	Long Beach (LGB)	100.3
6	Sarasota/Bradenton (SRQ)	97.7
7	Long Island Islip (ISP)	89.0
8	Providence (PVD)	84.5
9	Spokane (GEG)	83.0
10	Myrtle Beach (MYR)	82.1
33	Richmond (RIC)	54.2

Note: There were 71 Small Hub airports as of April 2015

# Richmond (RIC)

## Average O&D Revenue per Flight - Domestic

### Average O&D Revenue per Flight – Peer Market



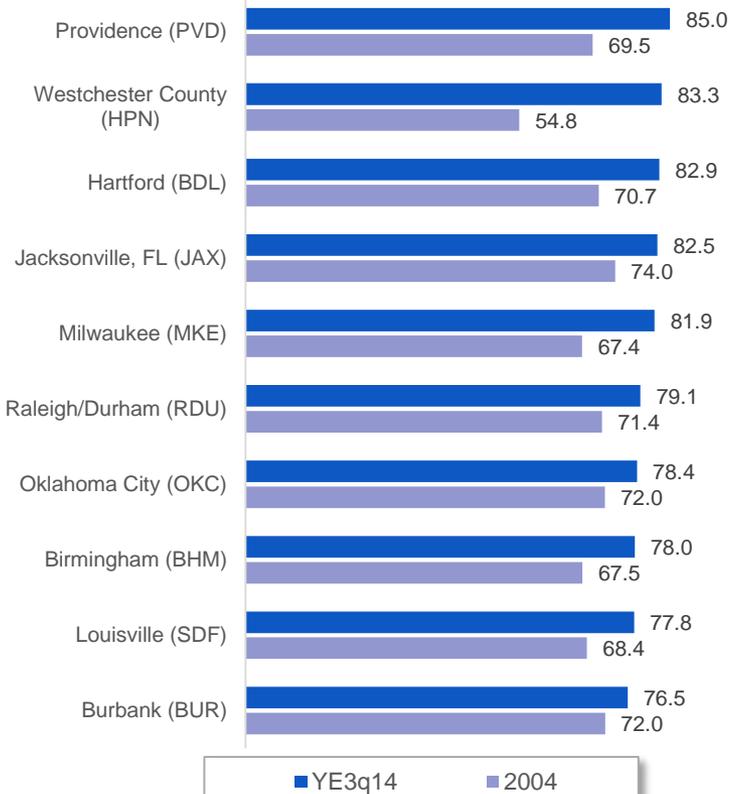
Rank	Top 10 Small Hub Airports	Average OD Revenue per Flight – YE3q14
1	Sarasota/Bradenton (SRQ)	\$17,917
2	Bozeman (BZN)	\$15,057
3	Spokane (GEG)	\$14,504
4	Providence (PVD)	\$13,992
5	Tucson (TUS)	\$13,725
6	Reno (RNO)	\$13,598
7	Pensacola (PNS)	\$12,862
8	Bellingham (BLI)	\$12,532
9	Manchester, ME (MHT)	\$12,440
10	Long Beach (LGB)	\$12,362
39	Richmond (RIC)	\$10,724

Note: There were 71 Small Hub airports as of April 2015

# Richmond (RIC)

## Average Load Factor % - Domestic

### Average Domestic Load Factor % – Peer Market

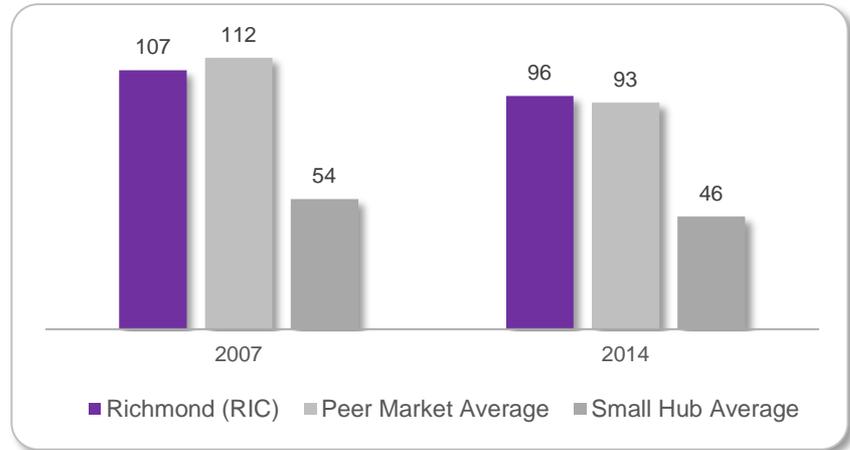
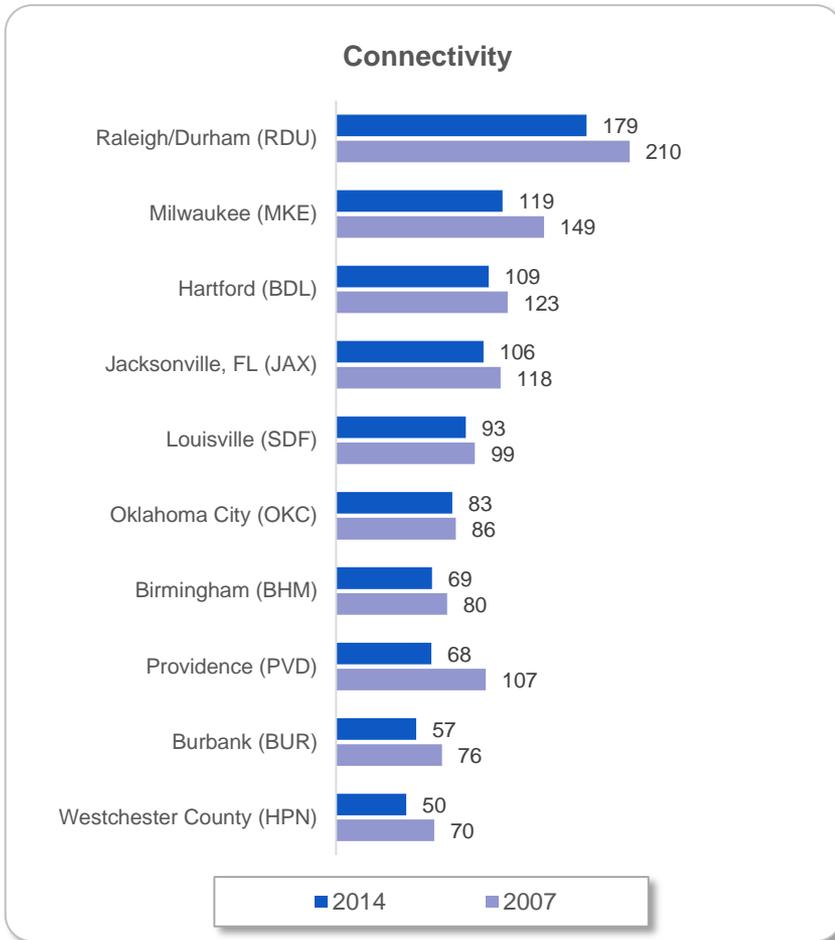


Rank	Top 10 Small Hub Airports	Average Load Factor % – YE3q14
1	Tampa (PIE)	89.0
2	Sanford (SFB)	88.5
3	Springfield, MO (SGF)	87.5
4	Cedar Rapids (CID)	86.7
5	Bellingham (BLI)	86.1
6	Long Beach (LGB)	86.0
7	Atlantic City (ACY)	85.7
8	Fresno (FAT)	85.4
9	Fargo (FAR)	85.4
10	Manchester, ME (MHT)	85.2
46	Richmond (RIC)	79.7

Note: There were 71 Small Hub airports as of April 2015

# Richmond (RIC)

## Connectivity



Rank	Top 10 Small Hub Airports	ACQI - 2014
1	Richmond (RIC)	96.2
2	Louisville (SDF)	92.8
3	Memphis (MEM)	87.4
4	Norfolk (ORF)	86.7
5	Charleston, SC (CHS)	83.7
6	Rochester, NY (ROC)	73.6
7	Dayton (DAY)	72.1
8	Tulsa (TUL)	71.9
9	Tucson (TUS)	70.9
10	Syracuse (SYR)	70.6

Note: There were 71 Small Hub airports as of April 2015

# Roanoke

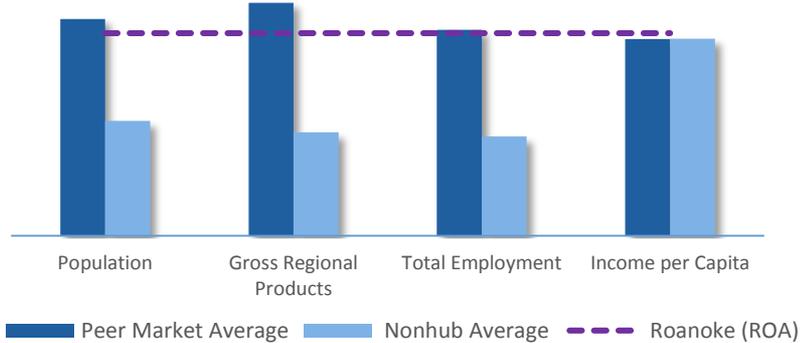
---

# Roanoke (ROA)

## Peer Markets for Roanoke



Roanoke compared with peer market and Non-Hub average in key demographic & economic indicators



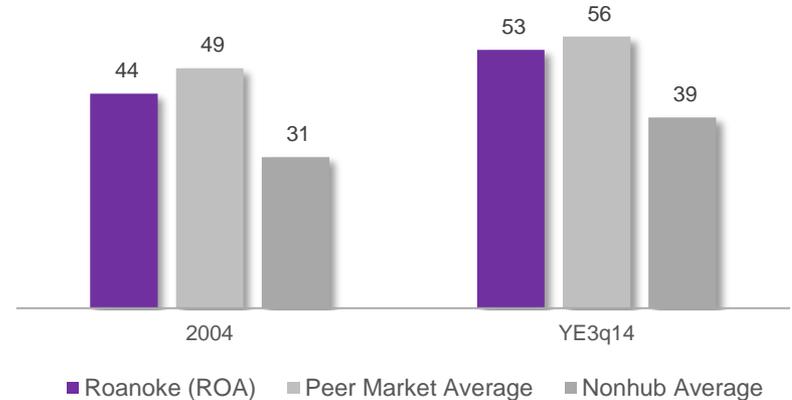
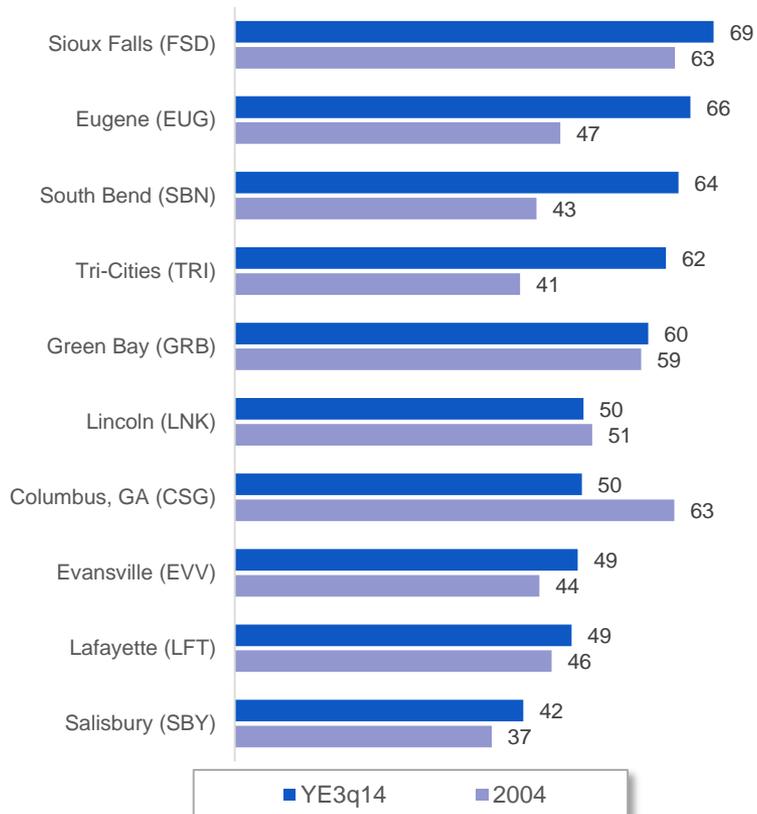
## 2014 Demographic & Economic Figures

Peer Market	Population	Gross Regional Products	Total Employment	Income per Capita
Columbus, GA (CSG)	309,851	\$14,217,976	184,703	\$42,651
Eugene (EUG)	364,353	\$14,375,408	197,749	\$37,084
Evansville (EVV)	318,007	\$14,817,158	186,144	\$41,344
Sioux Falls (FSD)	245,836	\$14,436,691	185,383	\$48,682
Green Bay (GRB)	320,330	\$15,740,571	211,343	\$42,023
Lafayette (LFT)	492,517	\$30,937,868	302,212	\$42,554
Lincoln (LNK)	318,134	\$15,940,155	220,136	\$42,219
South Bend (SBN)	322,493	\$13,421,843	169,094	\$38,882
Salisbury (SBY)	388,601	\$14,282,157	204,281	\$38,724
Tri-Cities (TRI)	315,665	\$10,376,324	160,538	\$35,913
Roanoke (ROA)	317,197	\$13,790,113	198,919	\$42,228
Peer Market Average	339,579	\$15,854,615	202,158	\$41,008
Non-Hub Average	180,001	\$7,050,325	97,649	\$41,113

# Roanoke (ROA)

## Average Seats per Departure - Domestic

Average Seats per Departure – Peer Market



Rank	Top 10 Non-Hub Airports	Average Seats per Departure – YE3q14
1	Portsmouth, NH (PSM)	170
2	Rockford, IL (RFD)	168
3	Latrobe, PA (LBE)	157
4	Bullhead City, AZ (IFP)	143
5	Trenton, NJ (TTN)	138
6	Vail/Eagle, CO (EGE)	123
7	Daytona Beach, FL (DAB)	122
8	Jackson Hole, WY (JAC)	112
9	Melbourne, FL (MLB)	107
10	Harlingen, TX (HRL)	102
64	Roanoke (ROA)	53

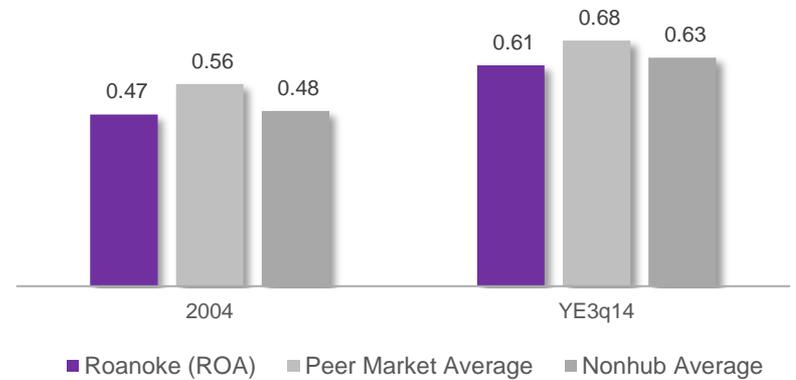
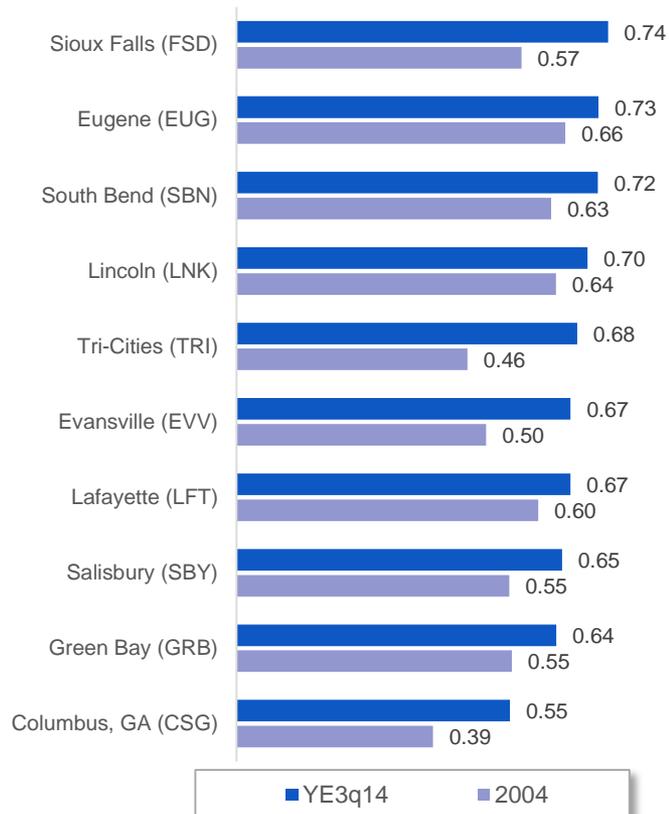
Note: There were 261 Non-Hub airports as of April 2015

Source: Innovata schedules, via Diio online portal; InterVISTAS analysis.

# Roanoke (ROA)

## Average O&D Traffic per Seat - Domestic

Average O&D Traffic per Seat- Peer Market



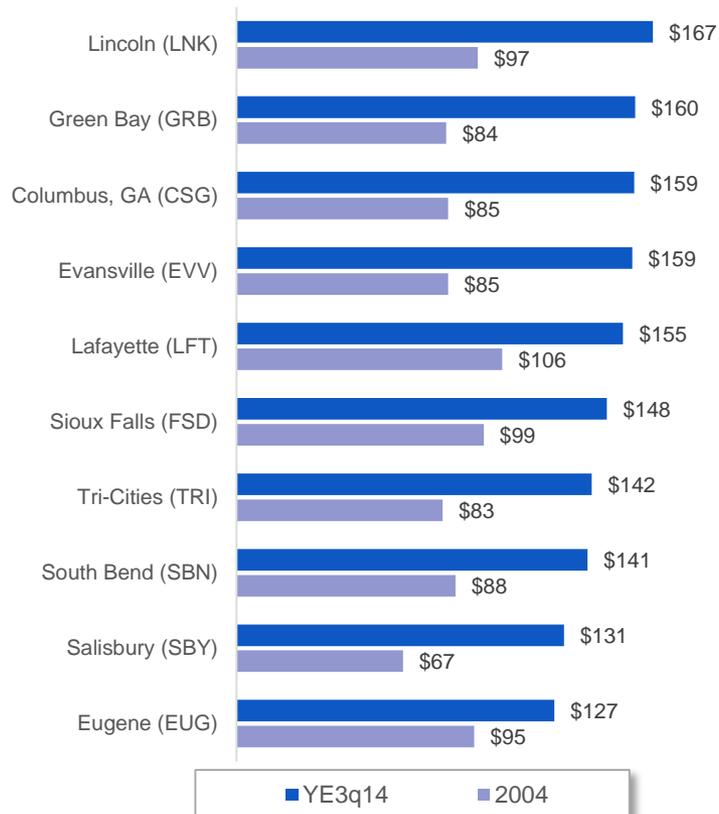
Rank	Top 10 Non-Hub Airports	Average OD Traffic per Seat – YE3q14
1	Rockford, IL (RFD)	0.93
2	Trenton, NJ (TTN)	0.90
3	Portsmouth, NH (PSM)	0.86
4	Latrobe, PA (LBE)	0.85
5	Daytona Beach, FL (DAB)	0.82
6	Newburgh, NY (SWF)	0.82
7	Grand Forks, ND (GFK)	0.80
8	Kalispell-Glacier, MT (FCA)	0.80
9	Toledo, OH (TOL)	0.80
10	Missoula, MT (MSO)	0.79
134	Roanoke (ROA)	0.61

Note: There were 261 Non-Hub airports as of April 2015

# Roanoke (ROA)

## Average O&D Revenue per Seat - Domestic

Average O&D Revenue per Seat– Peer Market



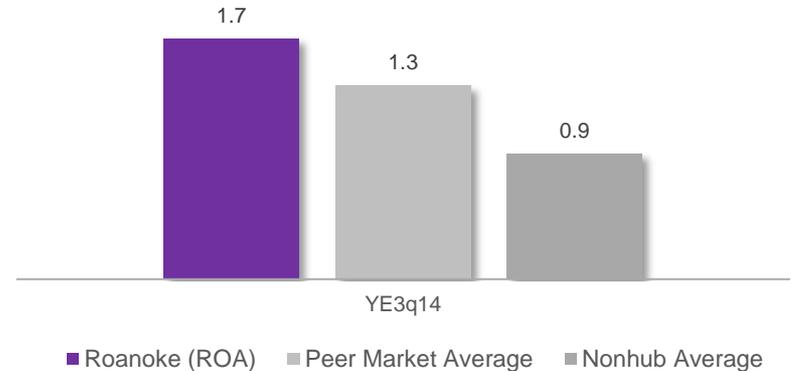
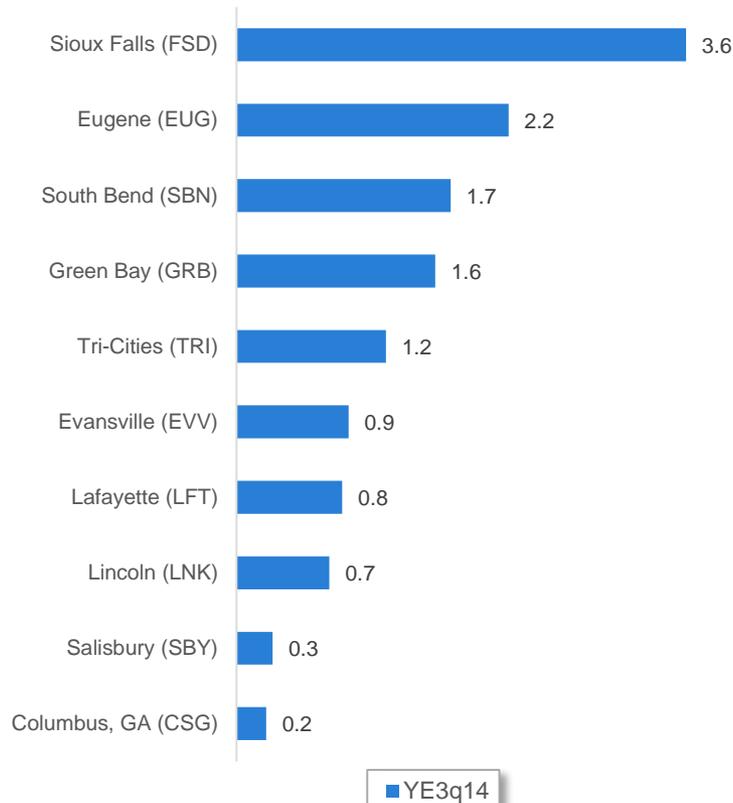
Rank	Top 10 Non-Hub Airports	Average OD Revenue per Seat – YE3q14
1	Dothan, AL (DHN)	\$197.6
2	Minot, ND (MOT)	\$197.3
3	Bakersfield, CA (BFL)	\$184.5
4	Jackson Hole, WY (JAC)	\$184.2
5	Marquette, MI (MQT)	\$183.9
6	Columbus, MS (GTR)	\$181.7
7	Elko, NV (EKO)	\$181.6
8	Dickinson, ND (DIK)	\$181.5
9	Bismarck, ND (BIS)	\$178.7
10	Kalispell-Glacier, MT (FCA)	\$178.2
109	Roanoke (ROA)	\$137.0

Note: There were 261 Non-Hub airports as of April 2015

# Roanoke (ROA)

## Average O&D Traffic per Capita - Domestic

Average O&D Traffic per Capita – Peer Market



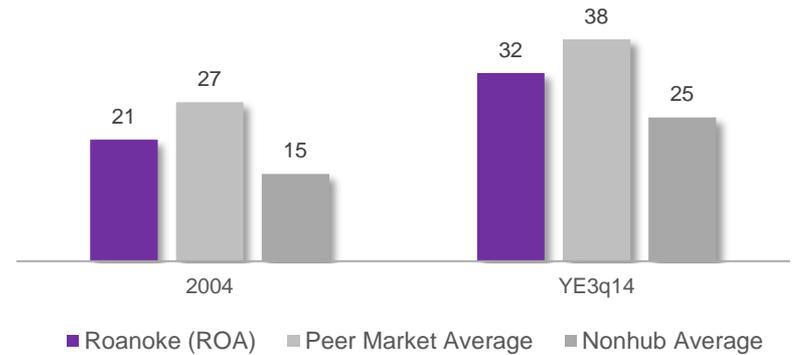
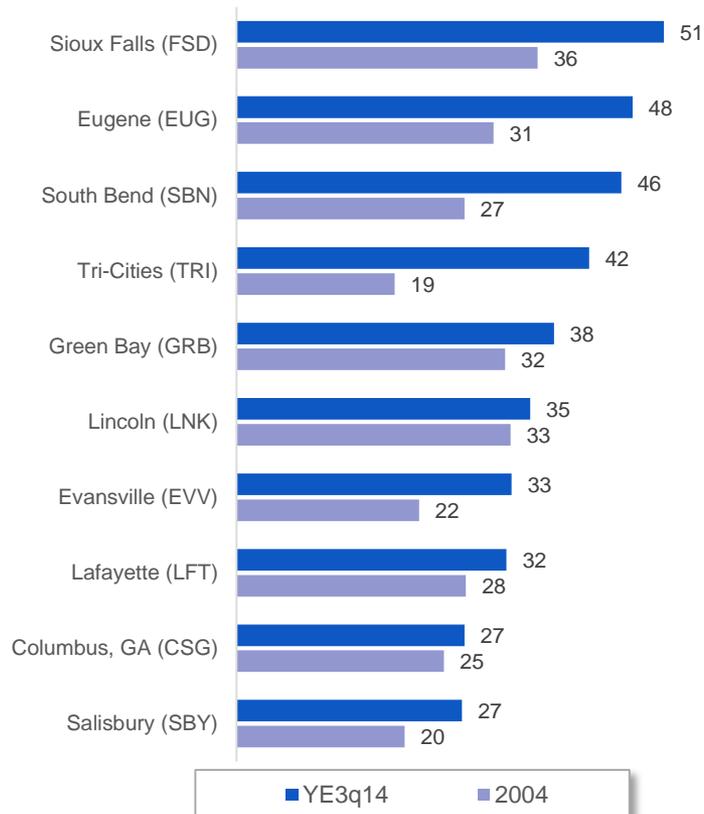
Rank	Top 10 Non-Hub Airports	Average OD Traffic per Capita – YE3q14
1	Jackson Hole, WY (JAC)	16.57
2	Durango, CO (DRO)	6.50
3	Minot, ND (MOT)	5.75
4	Vail/Eagle, CO (EGE)	5.38
5	Missoula, MT (MSO)	5.38
6	Martha's Vineyard, MA (MVY)	5.36
7	Steamboat Springs/Hayden, CO (HDN)	4.59
8	Great Falls, MT (GTF)	4.52
9	Kalispell-Glacier, MT (FCA)	4.37
10	Hailey-Sun Valley, ID (SUN)	4.20
42	Roanoke (ROA)	1.65

Note: There were 261 Non-Hub airports as of April 2015

# Roanoke (ROA)

## Average O&D Traffic per Flight - Domestic

Average O&D Traffic per Flight – Peer Market



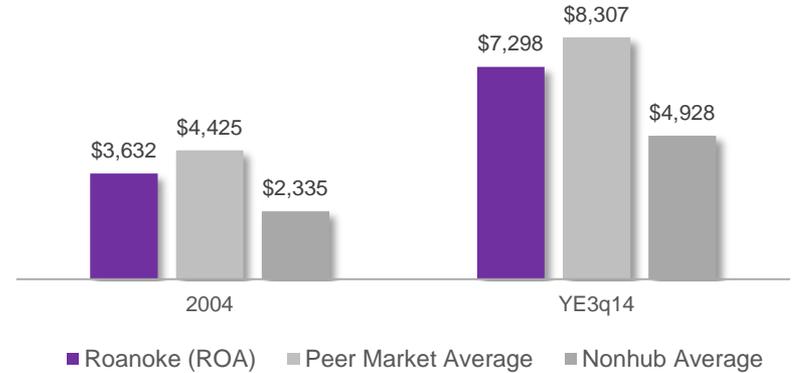
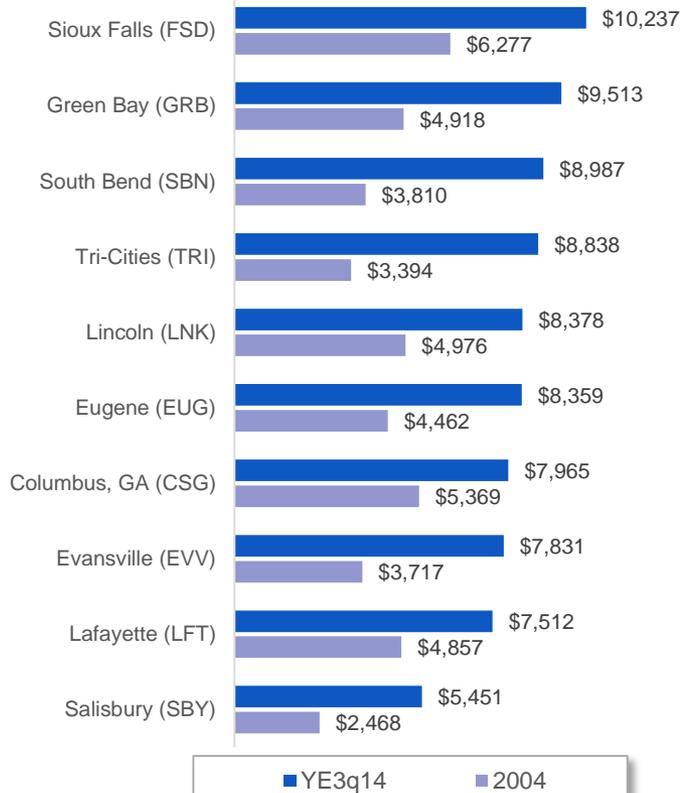
Rank	Top 10 Non-Hub Airports	Average OD Traffic per Flight – YE3q14
1	Rockford, IL (RFD)	156.2
2	Portsmouth, NH (PSM)	145.7
3	Latrobe, PA (LBE)	133.8
4	Trenton, NJ (TTN)	123.8
5	Daytona Beach, FL (DAB)	100.0
6	Melbourne, FL (MLB)	84.4
7	Jackson Hole, WY (JAC)	77.9
8	Vail/Eagle, CO (EGE)	74.9
9	McAllen, TX (MFE)	70.2
10	Harlingen, TX (HRL)	70.0
102	Roanoke (ROA)	32.4

Note: There were 261 Non-Hub airports as of April 2015

# Roanoke (ROA)

## Average O&D Revenue per Flight - Domestic

### Average O&D Revenue per Flight – Peer Market



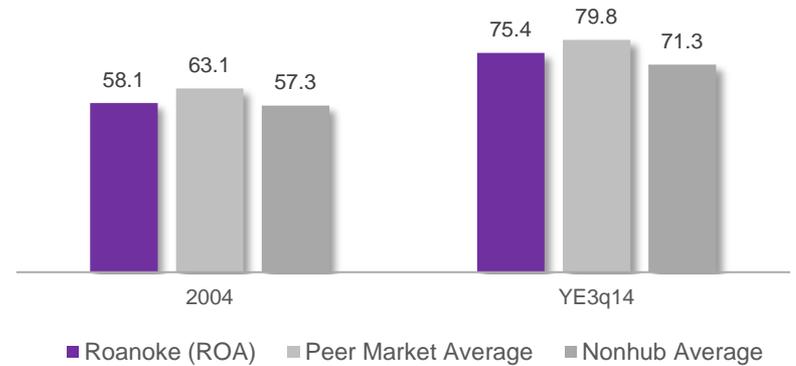
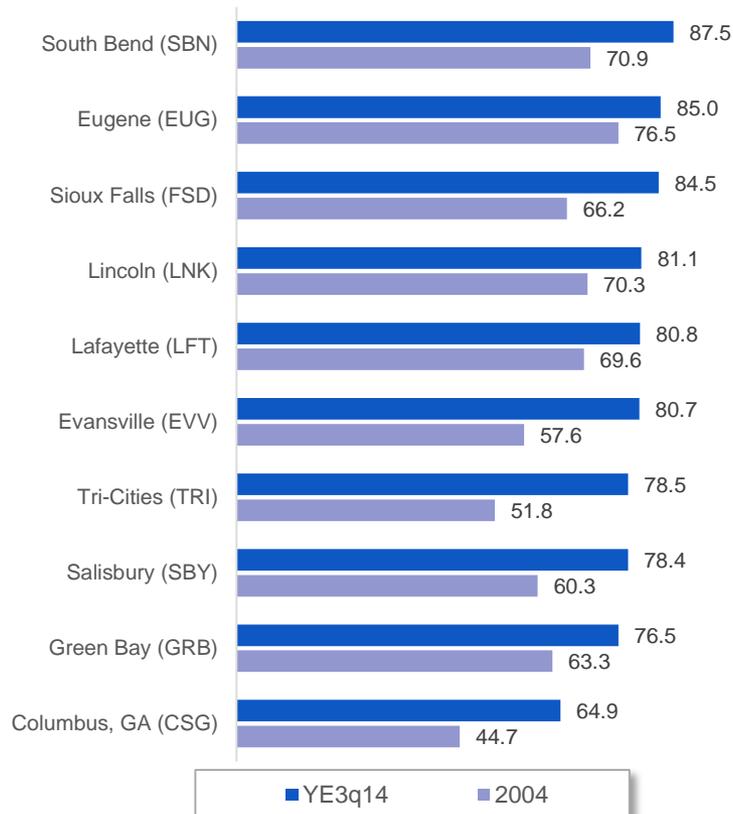
Rank	Top 10 Non-Hub Airports	Average OD Revenue per Flight – YE3q14
1	Jackson Hole, WY (JAC)	\$20,621
2	Vail/Eagle, CO (EGE)	\$19,231
3	Daytona Beach, FL (DAB)	\$17,436
4	Rockford, IL (RFD)	\$16,956
5	Melbourne, FL (MLB)	\$15,018
6	McAllen, TX (MFE)	\$13,979
7	Minot, ND (MOT)	\$13,859
8	Kalispell-Glacier, MT (FCA)	\$12,987
9	Steamboat Springs/Hayden, CO (HDN)	\$12,764
10	Portsmouth, NH (PSM)	\$12,419
92	Roanoke (ROA)	\$7,298

Note: There were 261 Non-Hub airports as of April 2015

# Roanoke (ROA)

## Average Load Factor % - Domestic

### Average Domestic Load Factor % – Peer Market

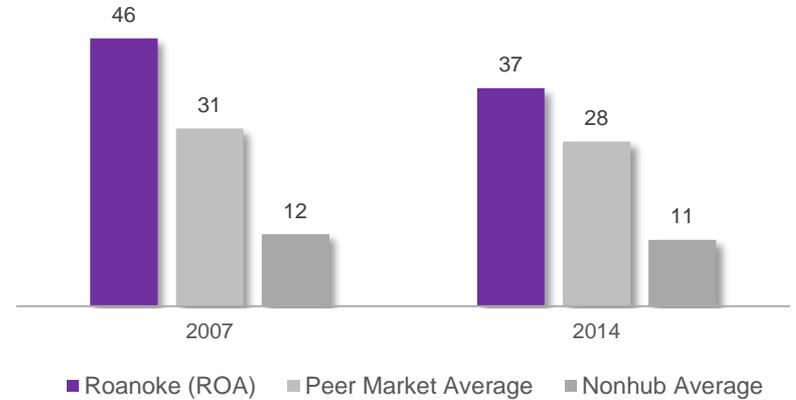
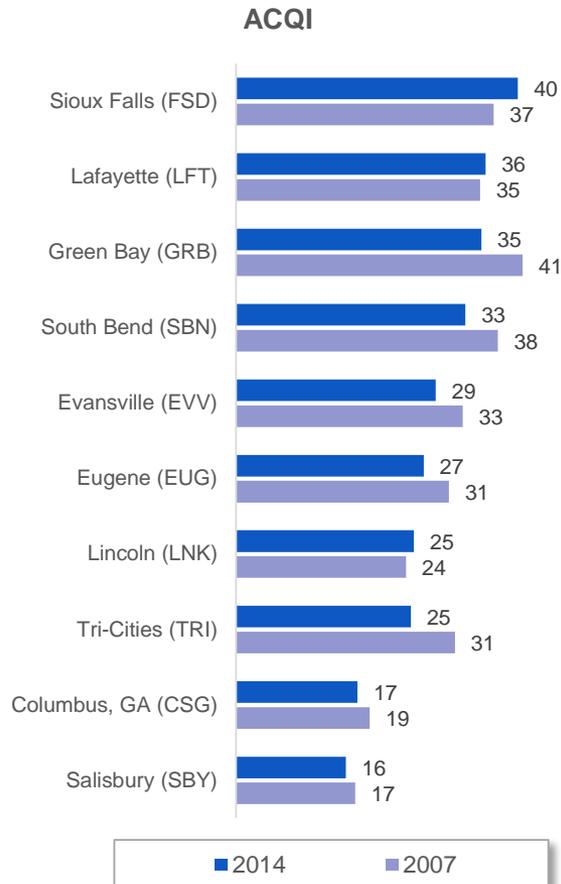


Rank	Top 10 Non-Hub Airports	Average Load Factor % – YE3q14
1	Rockford, IL (RFD)	91.8
2	Trenton, NJ (TTN)	90.1
3	Toledo, OH (TOL)	89.1
4	Portsmouth, NH (PSM)	87.9
5	Daytona Beach, FL (DAB)	87.7
6	South Bend, IN (SBN)	87.5
7	Newburgh, NY (SWF)	86.7
8	Hagerstown, MD (HGR)	86.5
9	Fort Wayne, IN (FWA)	86.3
10	Latrobe, PA (LBE)	86.0
88	Roanoke (ROA)	75.4

Note: There were 261 Non-Hub airports as of April 2015

# Roanoke (ROA)

## Airport Connectivity Quality Index - ACQI



Rank	Top 10 Non-Hub Airports	ACQI - 2014
1	Charleston, WV (CRW)	38.7
2	Tallahassee, FL (TLH)	38.4
3	Mobile, AL (MOB)	37.9
4	Roanoke, VA (ROA)	37.5
5	Shreveport, LA (SHV)	37.0
6	Lafayette, LA (LFT)	35.7
7	Peoria, IL (PIA)	35.7
8	Fort Wayne, IN (FWA)	35.6
9	Chattanooga, TN (CHA)	35.3
10	Green Bay, WI (GRB)	35.2

Note: There were 261 Non-Hub airports as of April 2015

# Shenandoah

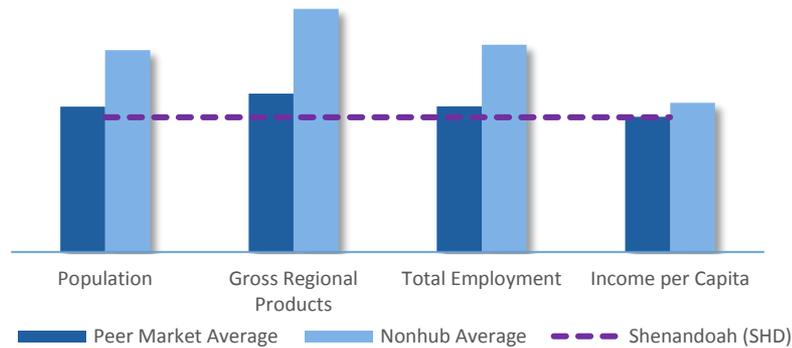
---

# Shenandoah (SHD)

## Peer Markets for Shenandoah



Shenandoah compared with peer market and Non-Hub average in key demographic & economic indicators



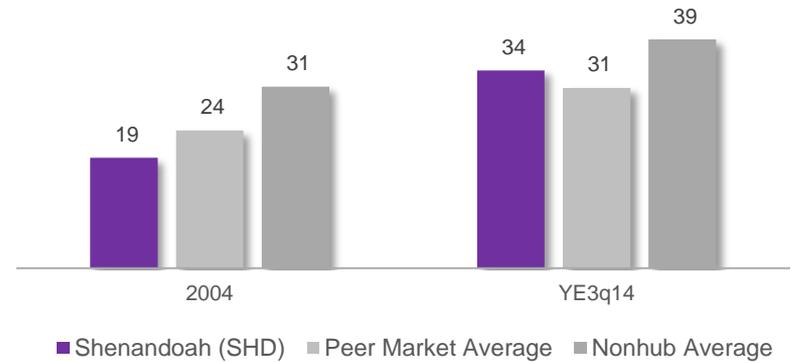
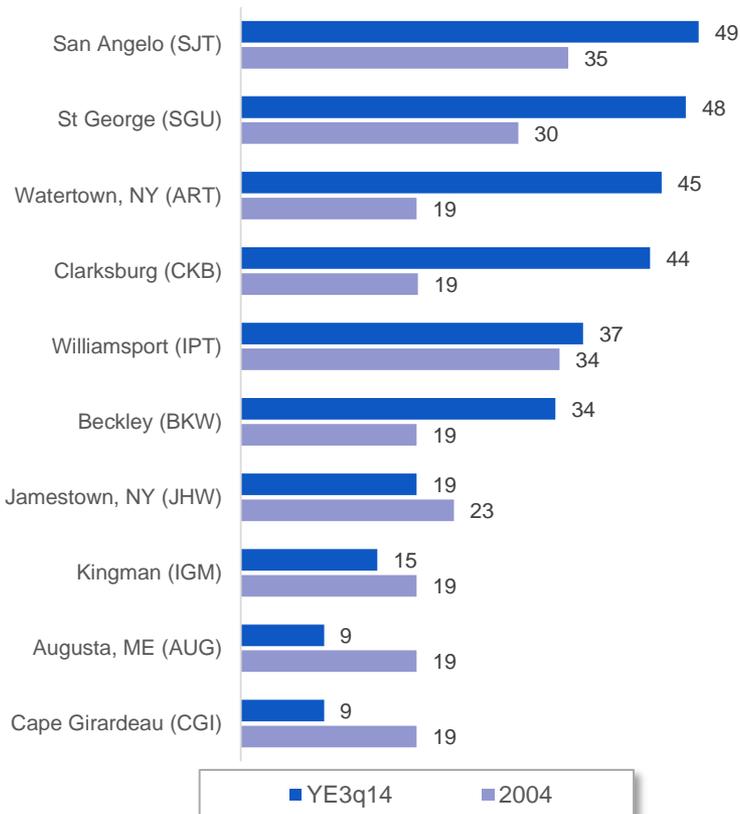
## 2014 Demographic & Economic Figures

Peer Market	Population	Gross Regional Products	Total Employment	Income per Capita
Watertown, NY (ART)	118,669	\$6,988,334	75,094	\$49,180
Augusta, ME (AUG)	125,143	\$5,150,134	78,965	\$39,922
Beckley (BKW)	125,398	\$4,110,012	61,175	\$36,791
Cape Girardeau (CGI)	100,058	\$3,782,536	63,741	\$36,733
Clarksburg (CKB)	95,217	\$4,087,091	54,356	\$37,934
Kingman (IGM)	209,757	\$4,075,996	65,737	\$28,916
Williamsport (IPT)	117,612	\$4,611,437	71,420	\$38,089
Jamestown, NY (JHW)	134,226	\$3,934,277	69,054	\$34,228
St George (SGU)	154,161	\$3,972,687	76,097	\$29,534
San Angelo (SJT)	116,240	\$5,235,103	70,912	\$40,882
Shenandoah (SHD)	120,247	\$3,911,489	63,528	\$37,126
Peer Market Average	129,648	\$4,594,761	68,655	\$37,221
Non-Hub Average	180,001	\$7,050,325	97,649	\$41,113

# Shenandoah (SHD)

## Average Seats per Departure - Domestic

Average Seats per Departure – Peer Market



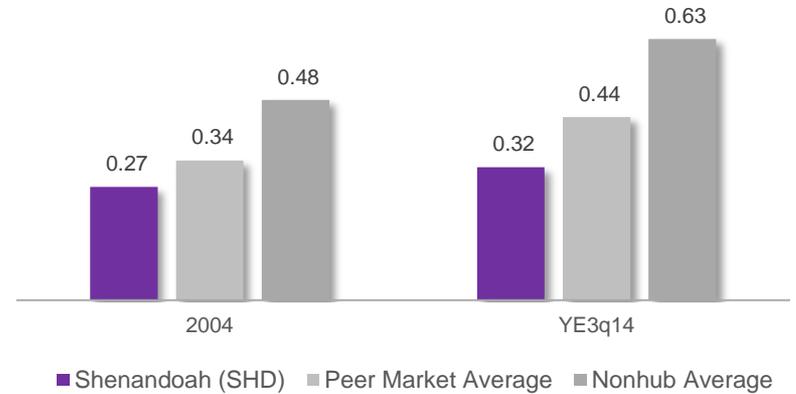
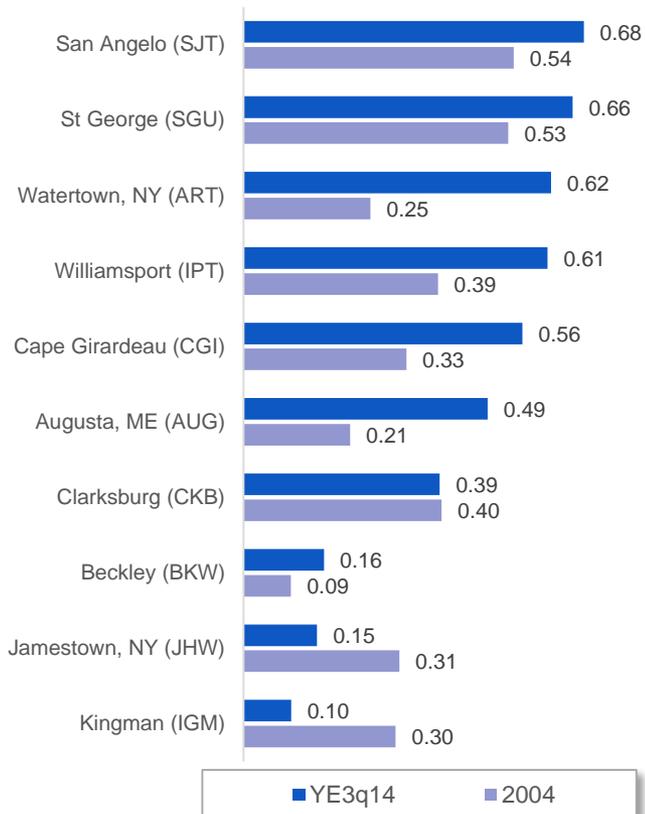
Rank	Top 10 Non-Hub Airports	Average Seats per Departure – YE3q14
1	Portsmouth, NH (PSM)	170
2	Rockford, IL (RFD)	168
3	Latrobe, PA (LBE)	157
4	Bullhead City, AZ (IFP)	143
5	Trenton, NJ (TTN)	138
6	Vail/Eagle, CO (EGE)	123
7	Daytona Beach, FL (DAB)	122
8	Jackson Hole, WY (JAC)	112
9	Melbourne, FL (MLB)	107
10	Harlingen, TX (HRL)	102
162	Shenandoah (SHD)	34

Note: There were 261 Non-Hub airports as of April 2015

# Shenandoah (SHD)

## Average O&D Traffic per Seat - Domestic

Average O&D Traffic per Seat- Peer Market



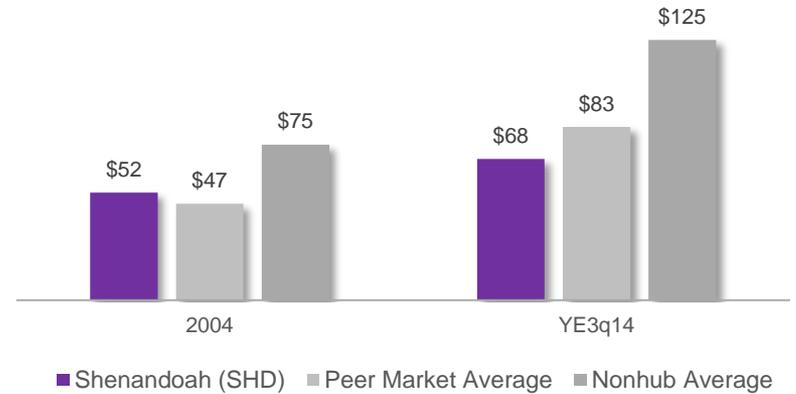
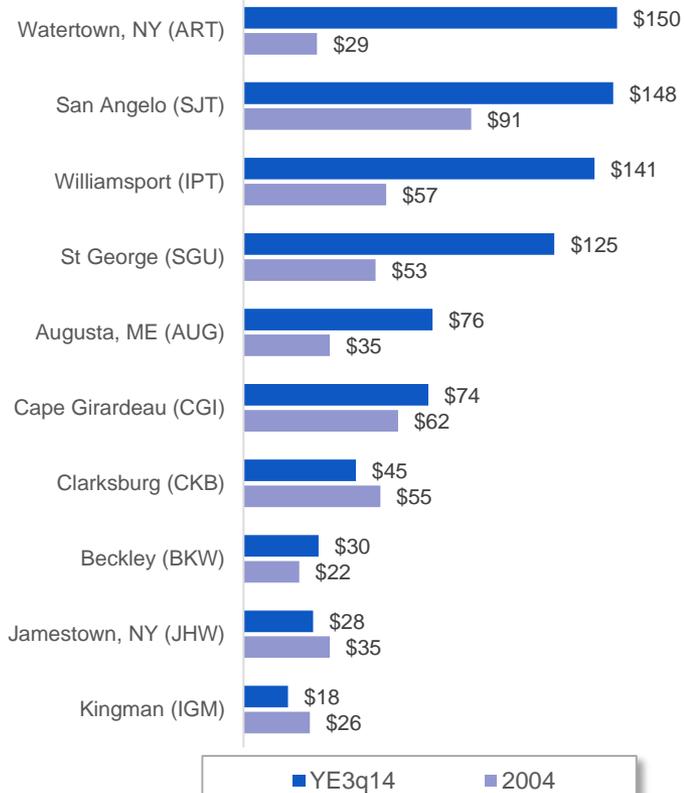
Rank	Top 10 Non-Hub Airports	Average OD Traffic per Seat – YE3q14
1	Rockford, IL (RFD)	0.93
2	Trenton, NJ (TTN)	0.90
3	Portsmouth, NH (PSM)	0.86
4	Latrobe, PA (LBE)	0.85
5	Daytona Beach, FL (DAB)	0.82
6	Newburgh, NY (SWF)	0.82
7	Grand Forks, ND (GFK)	0.80
8	Kalispell-Glacier, MT (FCA)	0.80
9	Toledo, OH (TOL)	0.80
10	Missoula, MT (MSO)	0.79
214	Shenandoah (SHD)	0.32

Note: There were 261 Non-Hub airports as of April 2015

# Shenandoah (SHD)

## Average O&D Revenue per Seat - Domestic

### Average O&D Revenue per Seat– Peer Market



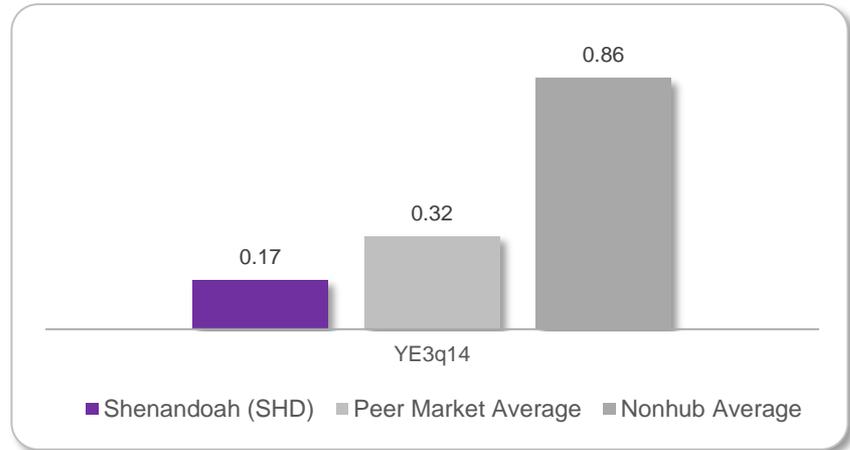
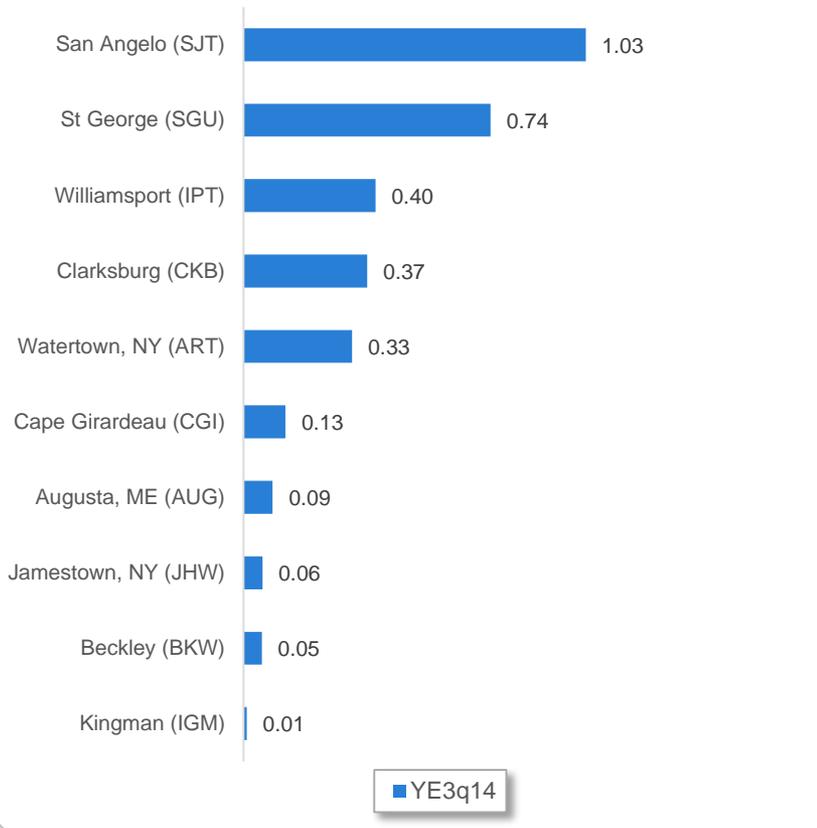
Rank	Top 10 Non-Hub Airports	Average OD Revenue per Seat – YE3q14
1	Dothan, AL (DHN)	\$197.6
2	Minot, ND (MOT)	\$197.3
3	Bakersfield, CA (BFL)	\$184.5
4	Jackson Hole, WY (JAC)	\$184.2
5	Marquette, MI (MQT)	\$183.9
6	Columbus, MS (GTR)	\$181.7
7	Elko, NV (EKO)	\$181.6
8	Dickinson, ND (DIK)	\$181.5
9	Bismarck, ND (BIS)	\$178.7
10	Kalispell-Glacier, MT (FCA)	\$178.2
191	Shenandoah (SHD)	\$68.0

Note: There were 261 Non-Hub airports as of April 2015

# Shenandoah (SHD)

## Average O&D Traffic per Capita - Domestic

### Average O&D Traffic per Capita – Peer Market



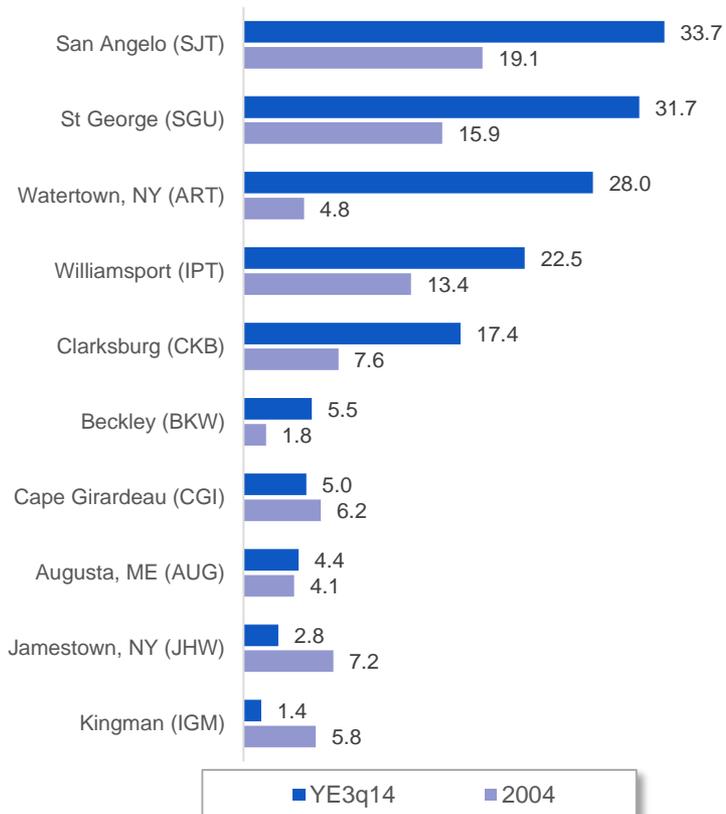
Rank	Top 10 Non-Hub Airports	Average OD Traffic per Capita – YE3q14
1	Jackson Hole, WY (JAC)	16.57
2	Durango, CO (DRO)	6.50
3	Minot, ND (MOT)	5.75
4	Vail/Eagle, CO (EGE)	5.38
5	Missoula, MT (MSO)	5.38
6	Martha's Vineyard, MA (MVY)	5.36
7	Steamboat Springs/Hayden, CO (HDN)	4.59
8	Great Falls, MT (GTF)	4.52
9	Kalispell-Glacier, MT (FCA)	4.37
10	Hailey-Sun Valley, ID (SUN)	4.20
204	Shenandoah (SHD)	0.17

Note: There were 261 Non-Hub airports as of April 2015

# Shenandoah (SHD)

## Average O&D Traffic per Flight - Domestic

### Average O&D Traffic per Flight – Peer Market



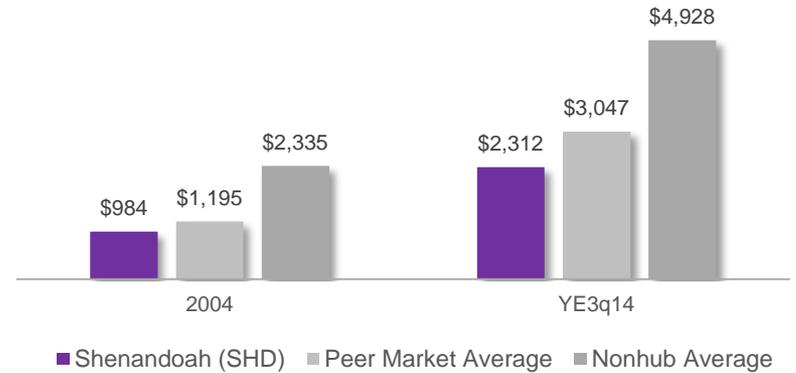
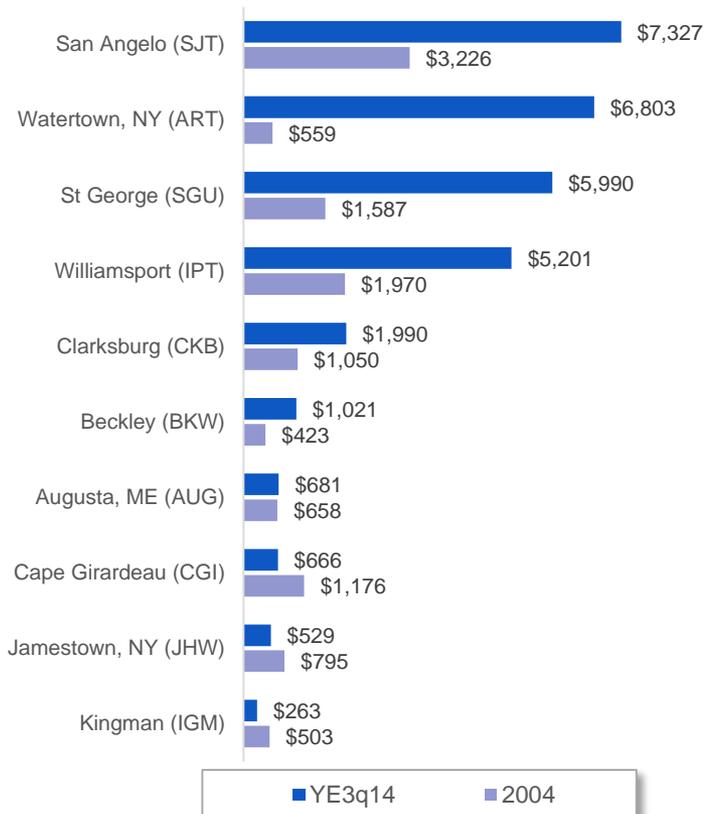
Rank	Top 10 Non-Hub Airports	Average OD Traffic per Flight – YE3q14
1	Rockford, IL (RFD)	156.2
2	Portsmouth, NH (PSM)	145.7
3	Latrobe, PA (LBE)	133.8
4	Trenton, NJ (TTN)	123.8
5	Daytona Beach, FL (DAB)	100.0
6	Melbourne, FL (MLB)	84.4
7	Jackson Hole, WY (JAC)	77.9
8	Vail/Eagle, CO (EGE)	74.9
9	McAllen, TX (MFE)	70.2
10	Harlingen, TX (HRL)	70.0
173	Shenandoah (SHD)	10.9

Note: There were 261 Non-Hub airports as of April 2015

# Shenandoah (SHD)

## Average O&D Revenue per Flight - Domestic

### Average O&D Revenue per Flight – Peer Market



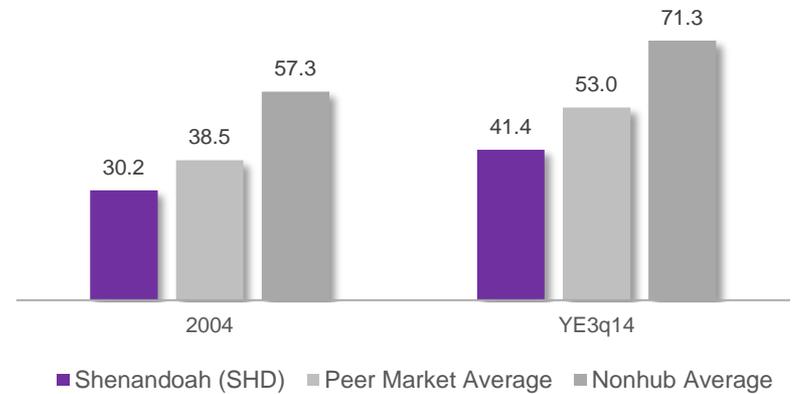
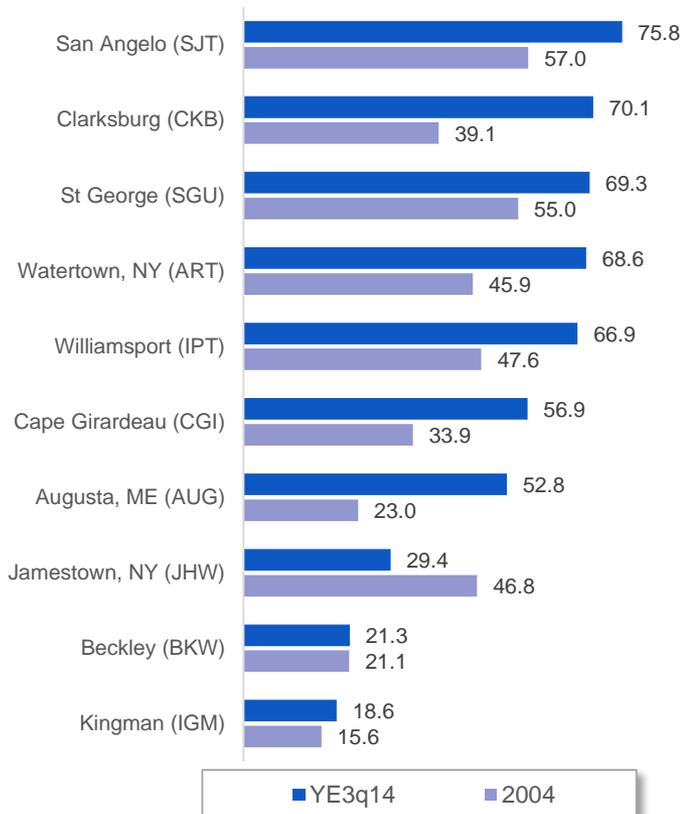
Rank	Top 10 Non-Hub Airports	Average OD Revenue per Flight – YE3q14
1	Jackson Hole, WY (JAC)	\$20,621
2	Vail/Eagle, CO (EGE)	\$19,231
3	Daytona Beach, FL (DAB)	\$17,436
4	Rockford, IL (RFD)	\$16,956
5	Melbourne, FL (MLB)	\$15,018
6	McAllen, TX (MFE)	\$13,979
7	Minot, ND (MOT)	\$13,859
8	Kalispell-Glacier, MT (FCA)	\$12,987
9	Steamboat Springs/Hayden, CO (HDN)	\$12,764
10	Portsmouth, NH (PSM)	\$12,419
172	Shenandoah (SHD)	\$2,312

Note: There were 261 Non-Hub airports as of April 2015

# Shenandoah (SHD)

## Average Load Factor % - Domestic

### Average Domestic Load Factor % – Peer Market

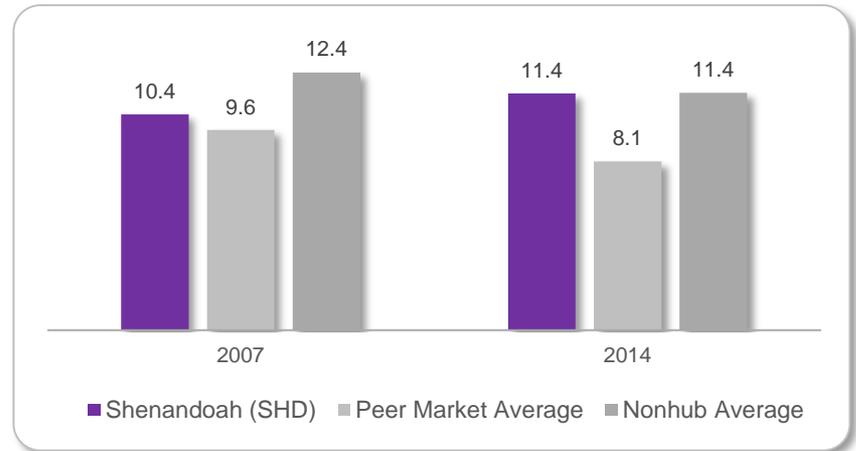
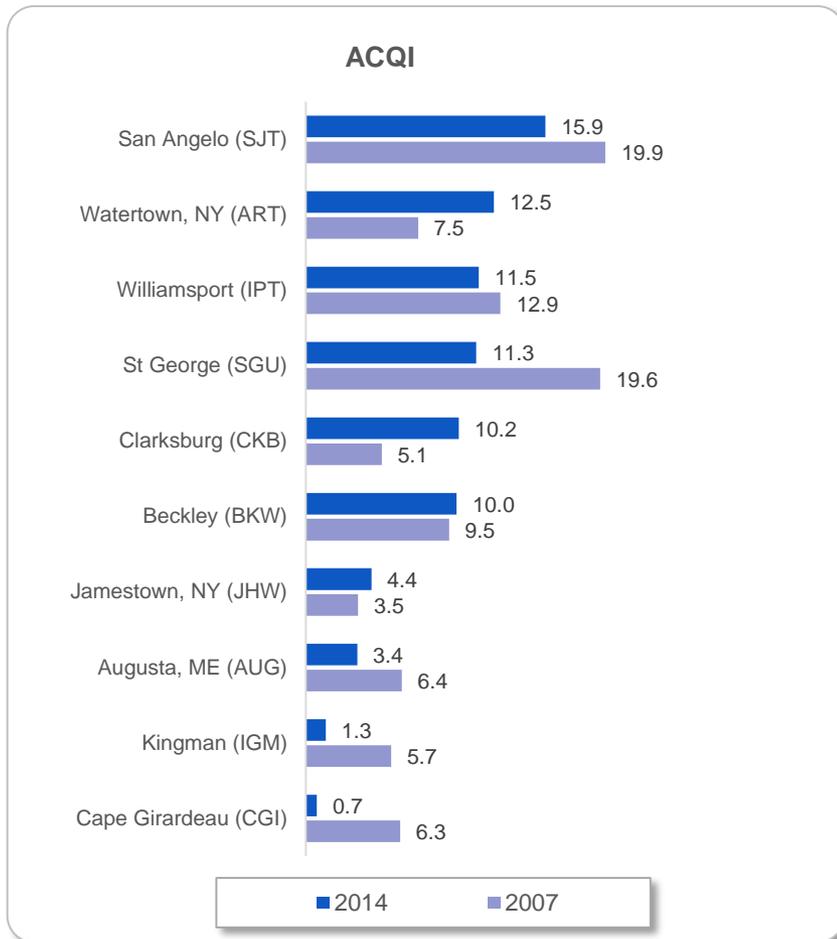


Rank	Top 10 Non-Hub Airports	Average Load Factor % – YE3q14
1	Rockford, IL (RFD)	91.8
2	Trenton, NJ (TTN)	90.1
3	Toledo, OH (TOL)	89.1
4	Portsmouth, NH (PSM)	87.9
5	Daytona Beach, FL (DAB)	87.7
6	South Bend, IN (SBN)	87.5
7	Newburgh, NY (SWF)	86.7
8	Hagerstown, MD (HGR)	86.5
9	Fort Wayne, IN (FWA)	86.3
10	Latrobe, PA (LBE)	86.0
210	Shenandoah (SHD)	41.4

Note: There were 261 Non-Hub airports as of April 2015

# Shenandoah (SHD)

## Airport Connectivity Quality Index - ACQI



Rank	Top 10 Non-Hub Airports	ACQI - 2014
1	Charleston, WV (CRW)	38.7
2	Tallahassee, FL (TLH)	38.4
3	Mobile, AL (MOB)	37.9
4	Roanoke, VA (ROA)	37.5
5	Shreveport, LA (SHV)	37.0
6	Lafayette, LA (LFT)	35.7
7	Peoria, IL (PIA)	35.7
8	Fort Wayne, IN (FWA)	35.6
9	Chattanooga, TN (CHA)	35.3
10	Green Bay, WI (GRB)	35.2
132	Shenandoah (SHD)	11.4

Note: There were 261 Non-Hub airports as of April 2015



# VIRGINIA COMMERCIAL AIR SERVICE STRATEGIC REVIEW

## Chapter 3 – Strategic Assessment for Virginia’s Small Hub and Non-hub Airports

Prepared for  
**Commonwealth of Virginia,  
Virginia Department of Aviation**

Prepared by  
**InterVISTAS**  
a company of Royal HaskoningDHV



March 20, 2015

## Contents

<b>1. Introduction.....</b>	<b>2</b>
<b>2. State-by-State Benchmarking of Virginia's Airports .....</b>	<b>3</b>
<b>Benchmarking All Virginia Commercial Service Airports.....</b>	<b>3</b>
<b>Benchmarking Virginia’s Seven Small and Non-Hub Airports .....</b>	<b>8</b>
<b>3. Review of Federal and Local Air Service Development Incentive Programs.....</b>	<b>15</b>
<b>Federal Programs .....</b>	<b>16</b>
Virginia SCASD Program Winners .....	17
<b>Local Airport Programs.....</b>	<b>17</b>
Small and Non Hub Air Service Incentive Programs .....	19
<b>4. Review of State Air Service Development Incentive Programs.....</b>	<b>22</b>
<b>Summary of States with Successful Programs .....</b>	<b>23</b>
Virginia .....	23
Iowa.....	24
New Mexico.....	25
Wyoming .....	25
Michigan .....	25
West Virginia.....	26
Kansas.....	26
Summary .....	27
<b>Summary of Unsuccessful and Proposed State Programs .....</b>	<b>28</b>
Maryland.....	28
Louisiana.....	28
Nevada .....	28
South Carolina .....	29
Kentucky .....	29
<b>5. Findings, Broader Discussion, and Recommendations .....</b>	<b>30</b>

# 1. Introduction

In Phase I of the Virginia Commercial Air Service Strategic Review, air service and passenger traffic trends were reviewed for each of Virginia’s primary commercial air service airports in relation to national and regional trends in air service. In Phase II of the study, a full benchmarking analysis was completed for each of the nine primary commercial air service airports in order to more accurately compare these airports’ performance to a set of individual-selected peer markets.

In this Phase—Phase III—a strategic assessment of Virginia’s small- and non-hub airports is conducted. This chapter reviews air service trends at small-hub airports at Richmond and Norfolk; non-hub airports at Charlottesville, Lynchburg, Roanoke and Newport News; and Shenandoah Valley, which is supported by an Essential Air Service (EAS) subsidy.<sup>1</sup> The performance of the Commonwealth’s smaller commercial air service airports is then benchmarked with state systems with similar attributes. The intention of the benchmarking included in this phase of the Strategic Review is not to compare airports against each other, but to identify targets and areas where marketing help can aid airports to maintain and even grow air service. Further it will guide the Commonwealth as to whether to make an investment and whether it should improve and enhance its existing air service marketing program.

Finally, an in-depth review of air service development incentive programs throughout the United States is conducted. Covered in this section are federal air service development programs designed for small communities, including the Essential Air Service (EAS) program and the Small Community Air Service Development (SCASD) Grant program. These federal programs are among the best known for providing subsidies or grants in exchange for commercial air service activities in small communities.

Also included is a detailed review of air service development incentives offered at the state and local level. Air service incentive activity is explored locally for twenty-one small- and non-hub airports in the United States. Furthermore, state-level air service development program activities are reviewed in twelve states, including the Commonwealth of Virginia. This analysis includes states that were successful in commencing and maintaining an air service development program, and those that were not. The lessons learned from this section can serve as a guide of best practices when establishing a new air service development program or retaining an existing one at the state- or Commonwealth-wide level.

---

<sup>1</sup> In 2014, small- hub airports enplaned between 0.38 and 1.9 million annual passengers and non-hub airports enplaned between 10,000 and 380,000 annual passengers. Depending on the amount of air transportation activity, EAS airports could enplane greater or fewer than 10,000 passengers per year.

## 2. State-by-State Benchmarking of Virginia's Airports

This section represents the final benchmarking exercise of the Virginia Commercial Air Service Strategic Review for all of Virginia's primary commercial service airports. Whereas the other benchmarking analyses have looked at individual airport performance versus peer airports with similar economic and demographic characteristics, this section analyzes performance on a state-by-state basis. And unlike other analyses in the report, it looks at two trend periods: August 2007 – August 2015; and August 2014 – August 2015. This closer look at trends reveals many positive changes, suggesting that the declines in service described in Phase I of this report are beginning to abate and modest growth trends are developing.

InterVISTAS chose eight states to which to compare the performance of the nine commercial air service airports in the Commonwealth of Virginia. In addition, we examine the performance of Virginia's small and non-hub airports to the small and non-hub airports of the comparative states. The states we benchmark against are: Illinois; Massachusetts; Michigan; Minnesota; New York; North Carolina; Pennsylvania; and Georgia.

InterVISTAS chose the eight states based on a similar mix of large, small and non-hub airports and the fact that there are no medium-hub airports present which can distort the results of the benchmarking exercise. For the states chosen, traffic and capacity levels are similar; InterVISTAS finds that the east coast and Midwest geographies behave most alike that of the Commonwealth's. We compared the states on the number of carriers operating; the number of nonstop routes; the number of departures performed; and the number of seats in each respective market. The statistical appendix includes an analysis of all 50 states and is not limited to the eight states chosen for comparison.

### Benchmarking All Virginia Commercial Service Airports

Of its eight peer states, no state has more average carriers operating per airport than does Virginia. This speaks to the extremely competitive air transportation environment that exists within the Commonwealth. Virginia's average is buoyed by the two Northern Virginia airports of Washington Dulles and Washington Reagan National Airport with 10 and 9 carriers operating respectively as of August 2015. Virginia's small-hub airports of Richmond and Norfolk have six and four carriers operating respectively. Among the Commonwealth's four non-hub airports, Roanoke has 4 carriers operating; Charlottesville has three carriers operating; Newport News has two carriers operating; and Lynchburg has one as does Shenandoah Valley as of August 2015.

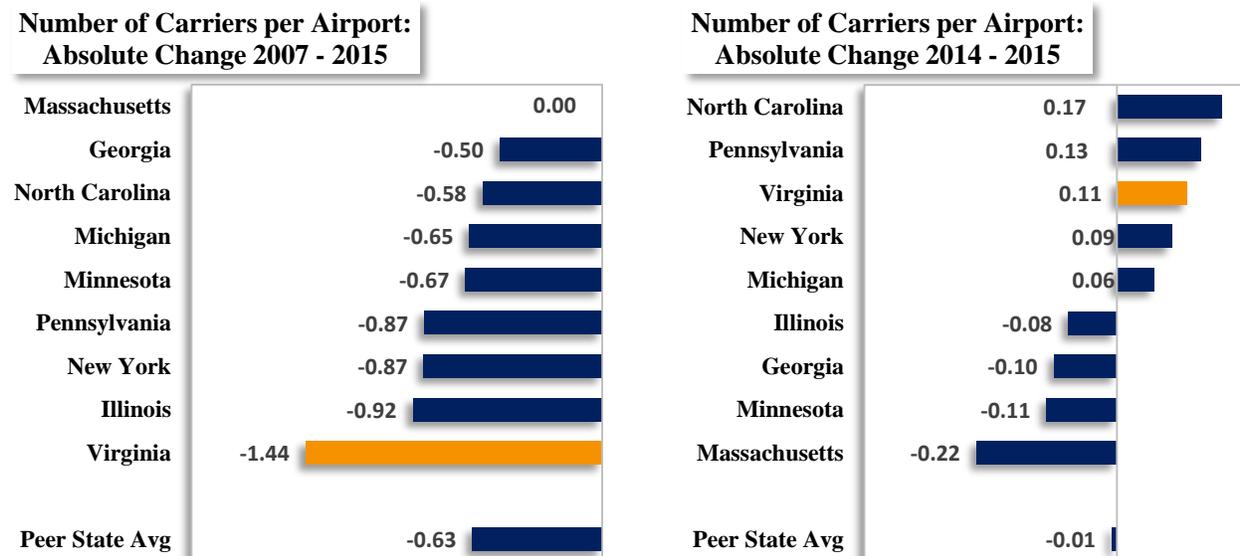
**Exhibit 2-1: Summary Metrics for All Commercial Service Airports in Benchmark States**

	Number of Carriers per Airport			Number of Nonstop Routes			Departures			Seats		
	Aug 07	Aug 14	Aug 15	Aug 07	Aug 14	Aug 15	Aug 07	Aug 14	Aug 15	Aug 07	Aug 14	Aug 15
Illinois	3.5	2.7	2.6	245	275	277	48,004	45,879	44,831	4,830,046	4,442,116	4,658,369
Massachusetts	3.0	3.2	3.0	104	103	103	20,969	19,388	19,182	1,492,358	1,570,477	1,654,803
Michigan	2.9	2.2	2.3	198	177	168	23,749	19,849	19,413	2,089,291	1,801,485	1,906,256
Minnesota	2.8	2.2	2.1	154	133	133	18,475	16,766	16,724	1,872,411	1,813,339	1,887,465
New York	3.8	2.9	3.0	282	259	256	45,453	37,743	37,178	4,132,322	3,765,208	3,860,161
North Carolina	3.5	2.8	2.9	186	190	203	30,956	29,774	29,849	2,665,983	2,854,014	2,895,254
Pennsylvania	3.7	2.7	2.8	203	176	187	29,311	23,170	23,500	2,476,030	2,035,727	2,089,068
Georgia	2.5	2.1	2.0	201	191	184	42,145	35,410	36,642	4,569,728	4,464,615	4,706,193
<b>Peer State Avg.</b>	<b>3.2</b>	<b>2.6</b>	<b>2.6</b>	<b>197</b>	<b>188</b>	<b>189</b>	<b>32,383</b>	<b>28,497</b>	<b>28,415</b>	<b>3,016,021</b>	<b>2,843,373</b>	<b>2,957,196</b>
<b>Virginia</b>	<b>5.9</b>	<b>4.3</b>	<b>4.4</b>	<b>226</b>	<b>219</b>	<b>217</b>	<b>31,876</b>	<b>26,593</b>	<b>26,872</b>	<b>2,743,949</b>	<b>2,313,800</b>	<b>2,475,001</b>

Source: Innovata SRS schedule data via Diio Mi.

As can be seen in Exhibit 2-1, the Commonwealth’s nine commercial air service airports have an average of 4.4 carriers versus 2.6 for the comparative state’s airport systems. The base period of August 2007 provides context as to the impact consolidation has had on the number of carriers operating at airports in Virginia and comparator states.

**Exhibit 2-2: Change in Number of Carriers per Primary Commercial Service Airport**

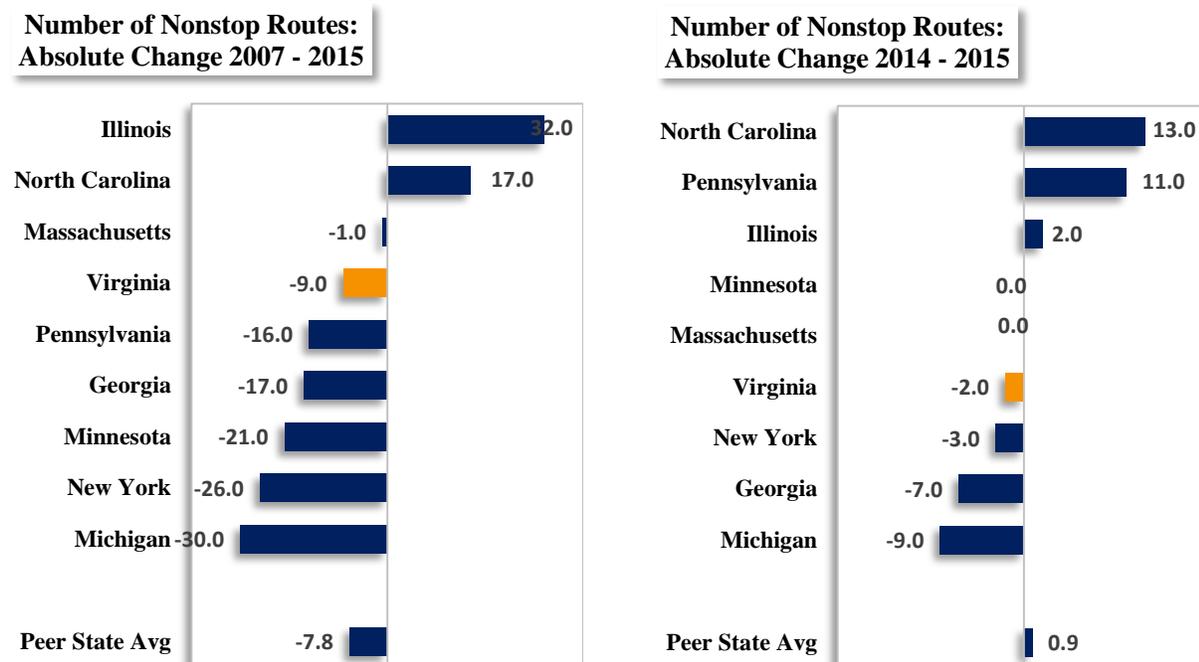


Source: Innovata SRS schedule data via Diio Mi.

Given the sheer number of carriers operating in the Commonwealth, it is not surprising that Virginia has seen the largest decrease in the number of carriers operating as of 2015 when compared to 2007. Yet the fact that there has been a marginal increase in number of carriers serving Virginia in the last year is a positive trend. Another positive development is that the number of international carriers has increased since both 2007 and 2014 at Washington Dulles International Airport.

From a state perspective, only Illinois (277) and New York (256) have more nonstop routes served from their commercial airport systems than the Commonwealth of Virginia (217). Washington Reagan National Airport has service to 82 domestic nonstop points Washington Dulles has service to 80 domestic points. Norfolk and Richmond each have service to 18 points; Roanoke has service to eight points; Charlottesville to six; Newport News to three; and Lynchburg and Shenandoah Valley each have service to one point as of August 2015.

**Exhibit 2-3: Change in Nonstop Routes Served from Primary Commercial Service Airports**



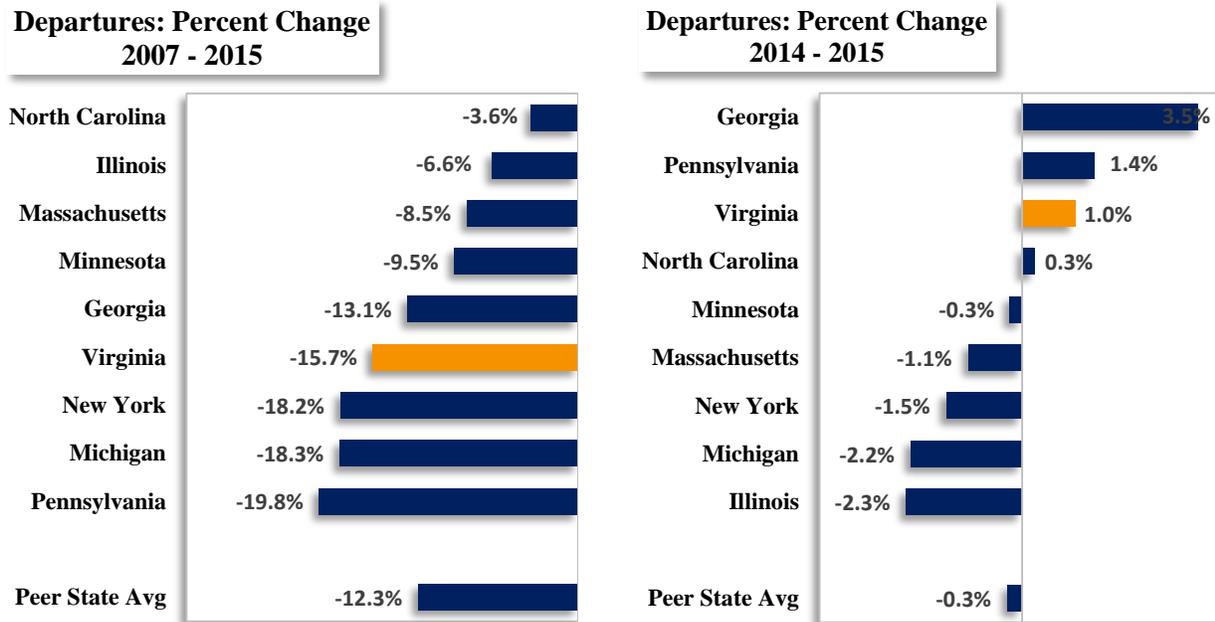
Source: Innovata SRS schedule data via Diio Mi.

Since 2007, only Illinois and North Carolina have seen increases in the number of domestic nonstop points served whereas Virginia lost service to nine points. On balance, Virginia has fared well when compared to peer state commercial aviation systems. Since 2014, Virginia has lost service to two domestic points while North Carolina, Pennsylvania, and Illinois all saw growth. Since 2014, only Richmond saw an increase in nonstop points served while each Roanoke and Newport News each lost some nonstop domestic service. When compared to 2007, Washington Reagan has experienced an increase of 10 points served; Washington Dulles and Shenandoah Valley saw no change, and the remainder experienced a loss, with the biggest drops in the Norfolk and Newport News markets. Again, the impact of sequestration on this geographic region is still present.

In terms of scheduled departures at all of Virginia's airports, only Washington Reagan has experienced an increase since 2007. Each of the other eight commercial air service airports experienced declines ranging from -9% at Shenandoah Valley to -53% at Newport News as Southwest exited the market after purchasing AirTran – a lynchpin in Newport News' service portfolio. Despite all of the externalities that undermined Newport News' air service, the market still ranks as number 43 among 232 non-hub airports in terms of service.

As compared to 2014, the picture turns a bit brighter as the declines have slowed as the US domestic carriers have exhibited some appetite for growth. Washington Reagan continues to grow and is joined by Norfolk who saw departures in August 2015 as compared to the prior year period increase by 4.2%. Shenandoah Valley experienced no change in the number of departures as compared to 2014 while the other six commercial airports saw decreases range from 1.0% at Charlottesville to a decrease of 12.6% at Newport News.

**Exhibit 2-4: Change in Departures from Primary Commercial Service Airports**



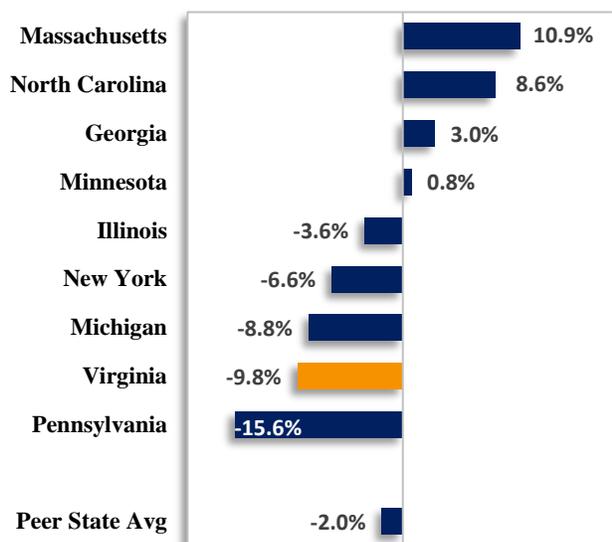
Source: Innovata SRS schedule data via Diio Mi.

In keeping with the trends identified in Phase I and II of this Strategic Review, departures at the peer states all declined when comparing 2015 with 2007. While Virginia performed very close to the peer average, the loss in the number of departures is still a significant 15.7%. Examining 2015 as compared to 2014, reveals a softening in the speed of decline. In fact, four of the nine states actually experienced a year-over-year increase in the number of departures.

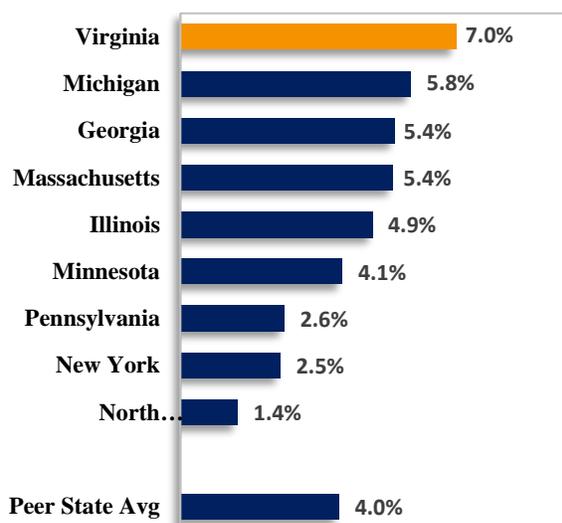
Between 2007 and 2015, Virginia’s nine commercial air service airports experienced a decrease in departures of 15.7% and a lesser decline in seats of 9.8%, mirroring the national trend of larger aircraft being deployed in the domestic system. But the Commonwealth was a mixed bag over the period. Four of the commercial air service airports actually saw an increase in the number of seats. Shenandoah Valley experienced a 64.2% increase in seats; Charlottesville saw a 12.2% increase in seats; Washington Reagan witnessed a 9.5% increase in the number of scheduled seats; and Lynchburg a 1.8% increase. Comparing 2015 with 2014, five of the nine airports experienced an increase in the number of seats with the three largest increases found Washington Reagan, Charlottesville, and Norfolk.

## Exhibit 2-4: Change in Seats from Primary Commercial Service Airports

**Seats: Percent Change 2007 - 2015**



**Seats: Percent Change 2014 - 2015**



Source: Innovata SRS schedule data via Diio Mi.

When compared to the eight peer states, only Pennsylvania experienced a greater loss in seats than Virginia did in 2007 – 2015 period. Pennsylvania had a 15.6% loss in the number of seats and Virginia a 9.8% loss. But when comparing 2015 with 2014, a tale of two periods appears. Compared to the peer states, Virginia will experience the greatest rate of increase in seats of 7.0% which is 3 points higher than the peer average.

## Benchmarking Virginia’s Seven Small and Non-Hub Airports

This section of the analysis—and the remainder of this Phase—focus specifically on the performance of the states’ smaller airports relative to their airport peers and state peers.

The Commonwealth’s small-hub airports of Richmond and Norfolk compare favourably to their peer airports with an average of five carriers serving the two airports. The Commonwealth’s non-hub airports of Roanoke, Charlottesville, Newport News, and Lynchburg enjoy an average of 2.5 carriers per market as compared to the 1.7 carrier average for all of the non-hub markets in the US. This compares well and suggests that competition, particularly at Roanoke and Charlottesville, is particularly keen given the consolidation of the industry. Finally, EAS market Shenandoah Valley has one carrier providing service which is similar to other EAS markets across the US.

**Exhibit 2-5: Summary Metrics for Small, Non-Hub, and Essential Air Service  
Airports in Benchmark States**

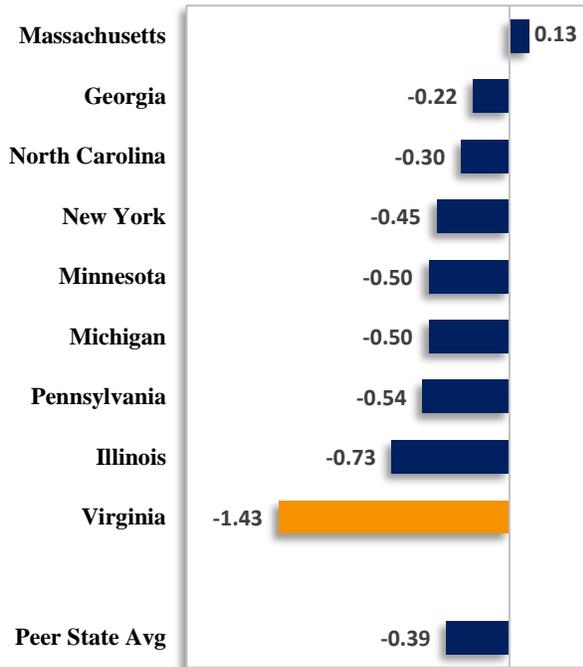
	Number of Carriers per Airport			Number of Nonstop Routes			Departures			Seats		
	Aug 07	Aug 14	Aug 15	Aug 07	Aug 14	Aug 15	Aug 07	Aug 14	Aug 15	Aug 07	Aug 14	Aug 15
Illinois	2.5	1.9	1.8	42	43	45	2,969	2,489	2,400	163,963	127,393	127,407
Massachusetts	1.9	2.3	2.0	27	32	29	6,378	5,376	4,603	86,418	86,161	78,788
Michigan	2.4	1.9	1.9	71	60	59	5,811	4,141	4,164	329,547	287,559	303,402
Minnesota	1.8	1.4	1.3	22	14	13	1,485	894	825	73,014	48,745	44,968
New York	2.9	2.4	2.4	122	105	106	12,735	8,720	8,147	861,785	601,574	592,149
North Carolina	2.3	2.0	2.0	43	39	40	4,943	3,892	3,742	279,862	250,992	253,010
Pennsylvania	2.5	2.1	2.0	51	51	48	4,538	3,268	3,316	206,350	182,986	184,903
Georgia	1.7	1.4	1.4	24	24	26	2,438	2,227	2,115	161,525	153,764	152,082
<b>Peer State Avg.</b>	<b>2.2</b>	<b>1.9</b>	<b>1.9</b>	<b>50</b>	<b>46</b>	<b>46</b>	<b>5,162</b>	<b>3,876</b>	<b>3,664</b>	<b>270,308</b>	<b>217,397</b>	<b>217,089</b>
<b>Virginia</b>	<b>4.4</b>	<b>3.1</b>	<b>3.0</b>	<b>74</b>	<b>57</b>	<b>55</b>	<b>8,669</b>	<b>6,365</b>	<b>6,303</b>	<b>603,140</b>	<b>449,428</b>	<b>461,824</b>

Source: Innovata SRS schedule data via Diio Mi.

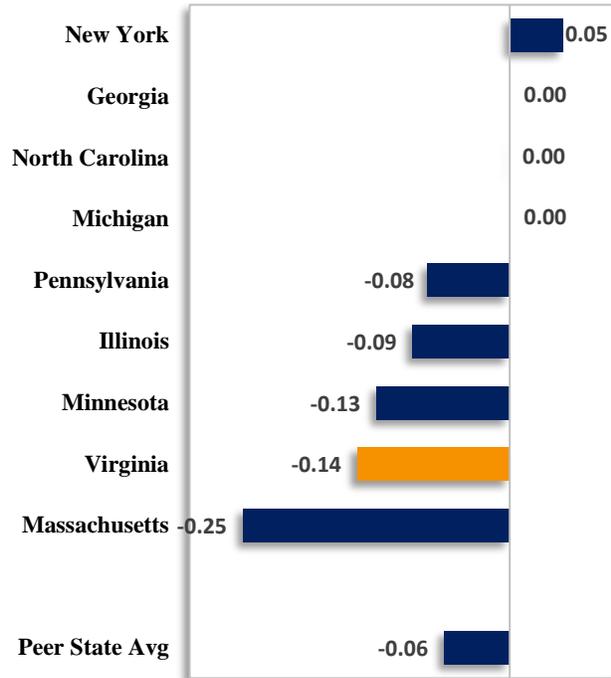
Virginia’s loss of 1.43 operating carriers at its small- and non-hub airports from 2007 to 2015 reflects the fact that the state has been well served historically and that consolidation is the culprit for losing operators. The marginal decline between 2014 and 2015 is likely not representative of a broader trend, considering the growth in seats and departures that the Commonwealth has experienced in the last year.

**Exhibit 2-6: Change in Number of Carriers per Small Hub, Non-Hub, and EAS Airport**

**Number of Carriers per Airport: Absolute Change 2007 – 2015 for Small Hub, Non-hub, and EAS Airports Only**



**Number of Carriers per Airport: Absolute Change 2014 – 2015 for Small Hub, Non-hub, and EAS Airports Only**



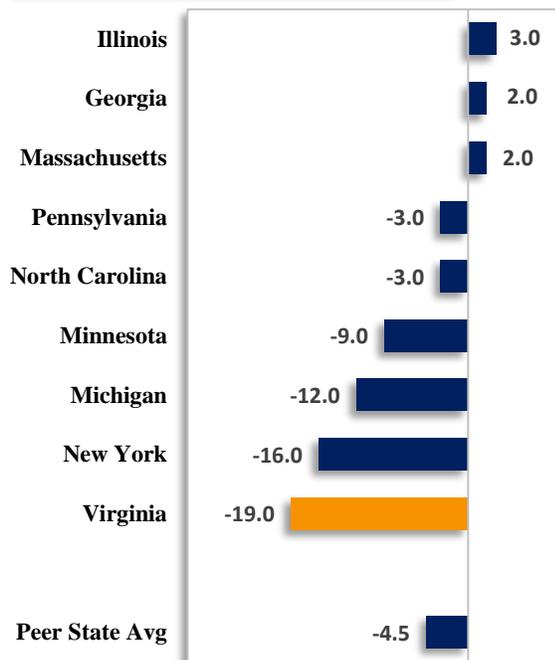
Source: Innovata SRS schedule data via Diio Mi.

The small-hub airports of Richmond and Norfolk account for 10 of the 19 nonstop route decreases between 2007 and 2015. Norfolk experienced a loss of seven nonstop services over the period and remained stable over the past year. Despite the losses of nonstop services, the two small-hub airports each retain more service than their peers throughout the U.S. Between 2007 and 2015, the Commonwealth’s non-hub airports of Roanoke, Charlottesville, Newport News, and Lynchburg each experienced at least one nonstop route loss. Newport News lost five nonstop routes during this volatile period, and again is largely explained by Southwest’s decision not to continue service from the airport after it purchased AirTran Airways.

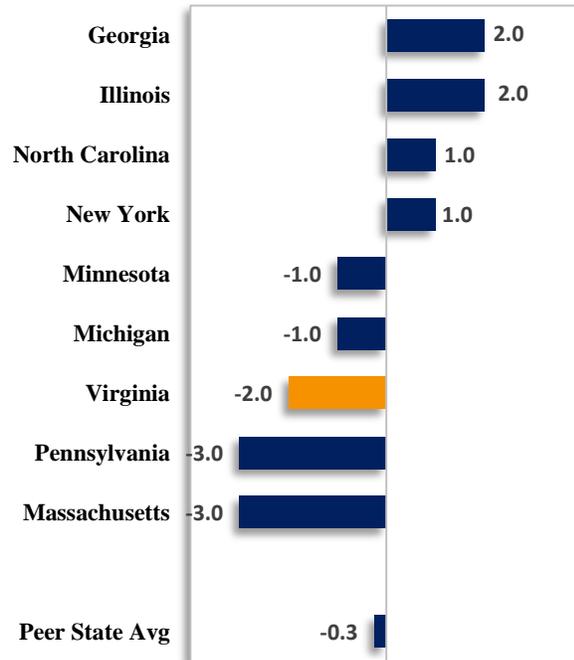
Despite the significant losses, Virginia’s non hub airports still have more service on average than their non-hub peers. EAS market Shenandoah Valley has remained constant over both the long and short term horizons analyzed, as would be expected in a federally subsidized market.

### Exhibit 2-7: Change in Nonstop Routes Served from Small Hub, Non-Hub, and EAS Airports

**Number of Nonstop Routes: Absolute Change 2007 – 2015 for Small Hub, Non-hub, and EAS Airports Only**



**Number of Nonstop Routes: Absolute Change 2014 – 2015 for Small Hub, Non-hub, and EAS Airports Only**



Source: Innovata SRS schedule data via Diio Mi.

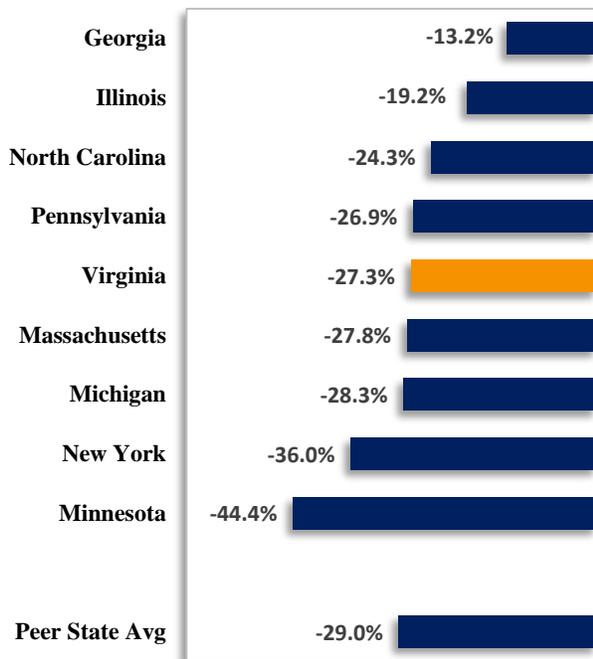
When compared to peer states, the Commonwealth’s small- and non-hub markets lost 19 nonstop routes between 2007 and 2015 – more than any other comparator state. Between 2014 and 2015, only Pennsylvania and Massachusetts have lost more than Virginia albeit only one more nonstop route. Throughout both periods, Charlottesville has held up despite the difficult period for airports of all sizes. An encouraging sign is to see stabilization and even modest growth at the two small-hub airports of Richmond and Norfolk.

One of the most disconcerting trends for airports around the country has been the decrease in the number of departures during the capacity rationalization and capacity discipline periods that define the industry following the spike in oil prices in 2008. The small hub airports in Virginia were no exception as Richmond lost 21.7% of its frequencies between 2007 and 2015 and Norfolk lost nearly 29% of its frequencies during that same period. Despite these staggering losses, Virginia’s two small-hub airports fared better than their small-hub peers. Both airports show stabilization in comparing 2015 with 2014, even to the point where Norfolk saw an increase of 4.2% in frequencies.

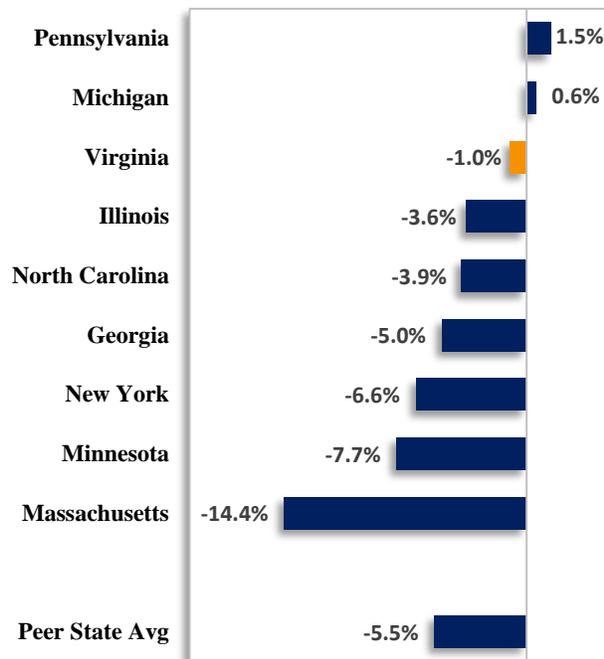
The Commonwealth’s non-hub airports performed on par with the peer states’ airports between 2007 and 2015 experiencing a decrease of 32.2% of their frequencies. Unlike Virginia’s small hub airports, non-hub airports in the Commonwealth have performed worse than the nation’s non-hub airports, losing 5.3% of their departures between 2014 and 2015. The lone exception again is Charlottesville. Over both periods, Shenandoah Valley lost fewer frequencies than their EAS airport peers.

**Exhibit 2-8: Change in Departures from Small Hub, Non-Hub, and EAS Airports**

**Departures: Percent Change 2007 – 2015 for Small Hub, Non-hub, and EAS Airports**



**Departures: Percent Change 2014 – 2015 for Small Hub, Non-hub, and EAS Airports**

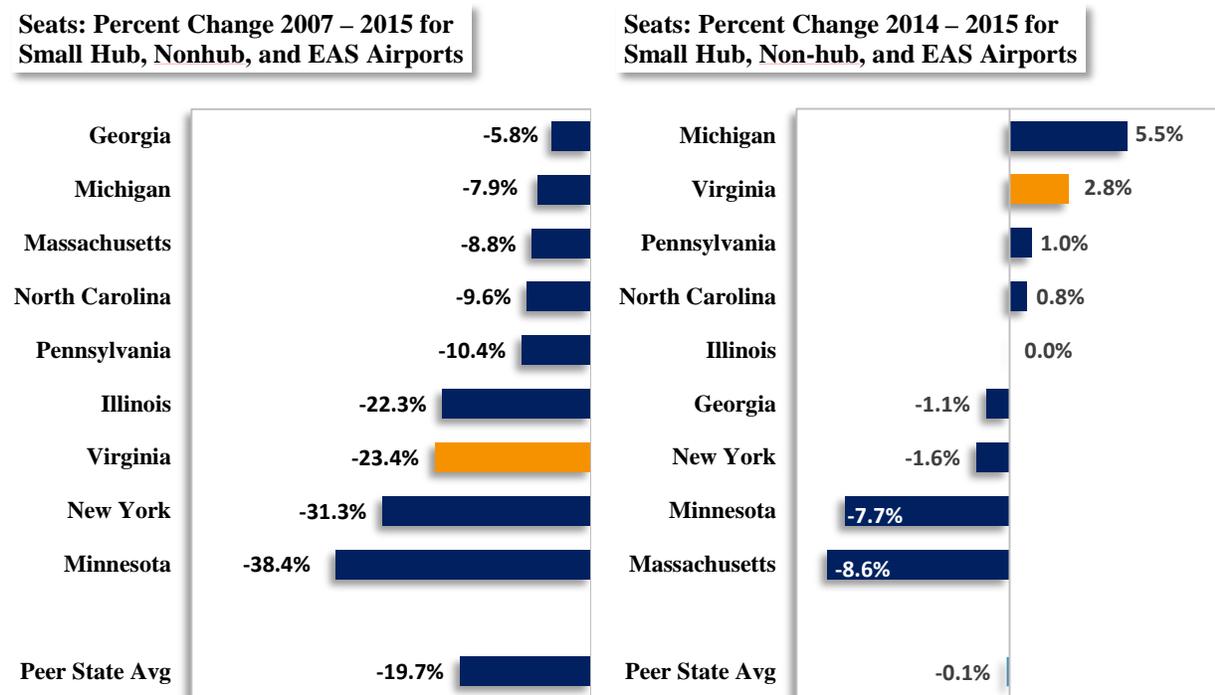


Source: Innovata SRS schedule data via Diio Mi.

On balance, Virginia’s small- and non-hub airports performed slightly better than its peer states between 2007 and 2015. However, in the 2014 to 2015 period, the Commonwealth’s small- and non-hub airports performed significantly better than their peer states, losing only 1.0% of departures versus a loss of 5.5% for the other states. Again the trend seems to suggest that absent any other exogenous shock to the system, the cuts in service in the Commonwealth have slowed and even stabilized.

Whereas Richmond and Norfolk lost 11.6% and 25.9% respectively of their seats between 2007 and 2015, the performance of the small-hub airports taken together was better than the US small-hub average. Moreover, each of the two airports has experienced significantly more seats than the small-hub average for the 2014 – 2015 period. The performance of the non-hub airports, on the other hand, shows a very different picture for Virginia’s non-hub airports for the 2007 – 2015 period. To the contrary, during the same period, Charlottesville saw an increase of 12.2%. Similar to the trend in frequencies, all of the non-hub airports, except Charlottesville, experienced a decrease in the number of seats between 2014 and 2015. This is contrary to the national trend of seat growth and is somewhat concerning. As a subsidized EAS airport, seat growth Shenandoah Valley was relatively stable.

**Exhibit 2-9: Change in Seats from Small Hub, Non-Hub, and EAS Airports**



Source: Innovata SRS schedule data via Diio Mi.

Each of Virginia's peer states also experienced a loss of seats between 2007 and 2015 with only New York and Minnesota losing a greater fraction than the Commonwealth does. The peer state average seat loss of -19.7% compares to the Commonwealth's average for all small- and non-hub markets of -23.4% over the 2007 – 2015 period. To the contrary, between 2014 and 2015 only Michigan's small- and non-hub airports experienced a seat gain greater than Virginia's did.

Air service development has been more difficult during the 2007 – 2015 period than at any time since the industry was deregulated. Small regional aircraft are the backbone of air service for many of the commercial air service airports in the Commonwealth and it is these aircraft flown by the regional airline industry that face many hurdles in the immediate future.

Countless numbers of smaller airports across the country are deeply concerned about their future as a dot on the airline network grid. Many of these communities have strong underlying economics that suggest that their place on that map is safe. But as the industry evolves, that is not necessarily the case. The real question is whether the network carriers will actually need all of the feed from their regional partners to fill mainline aircraft as they serve only bigger and bigger markets in the post-consolidation period.

At risk is service to smaller communities as airlines gravitate to only the largest markets in a network map that could look much as it did when deregulation began. Combine this with the fact that there is no replacement aircraft for airframes in the 50-seat and less category and the fact that a pilot shortage at the regional level is beginning to lead directly to flight cancellations and service discontinuation at small communities, there is concern over the sustainability of air service at many of the nation's smallest airports over the coming years.

To counter this trend, many communities and states have turned to air service incentives or subsidies. Subsidizing air service in order to maintain existing flights or attract new service has been used for years with mixed results. Today, risk-averse airlines are reluctant to add service, or continue to fly existing services, that do not at least cover their cost of capital. The Strategic Review now turns to explore national, state, and local programs that are designed to promote air service development and their successes and challenges over the last decade.

### **3. Review of Federal and Local Air Service Development Incentive Programs**

The Commonwealth of Virginia recognizes the value of air service and seeks to better understand the tactics of other states and airports are doing regarding air service development incentive programs. This section specifically looks at incentive programs targeted towards small- and non-hub airports. InterVISTAS researched incentive programs offered at the federal level by the USDOT, at the local level from individual airports, and a selection of state-wide programs. The review of state programs helps support the broader policy questions and issue Virginia must evaluate should it choose to pursue a more comprehensive incentive program in the future.

Air service is an important economic development driver that benefits both the communities an airport serves and the state in general. According to a 2011 Economic Impact Study conducted for Virginia, the small- and non-hub airports in Virginia created more than 29 thousand jobs with an estimated \$951 million in payroll. These airports led to an economic output of approximately \$3.0 billion. As an important part of the local and state economy, the small and non-hub airport's air service is key, providing access to the market for business and visitors and facilitating trade activity.

Additionally, increasing connections to other airports in the country and the world will continue to develop the economic impact an airport generates within the state. Yet in today's aviation environment where airlines are focused on profitability and have reduced capacity greatly and increased regional aircraft size, small- and non-hub airports need to be aware of the risks that carriers face when serving a smaller community. Risk mitigation through incentive programs can be offered by the state, an airport, a local authority, or the federal government.

These incentive programs have become a tool that airports can provide to carriers to help develop air service and increase the likelihood for success. Airport incentives to airlines take many forms, include both temporary cost waivers and promotional efforts, and range from revenue guarantees to support from marketing activities for eligible services. There are limits as to what airports can do however. Given that there are prohibitions and limitations of using airport funds for revenue guarantees, in most instances they are community guarantees rather than airport guarantees. It's important to create an incentive program that is short-term and provides critical early stage support for new service, frequency, and aircraft opportunities that seem to show a strong likelihood for success based on sound analysis and research.

## Federal Programs

Federally funded air service development programs designed for small communities include Essential Air Service and, more recently, the Small Community Air Service Development (SCASD) Program. EAS started after the Airline Deregulation Act of 1978 and SCASD began in 2001. These Federal programs are targeted towards small communities to help maintain a level of air service (EAS) at airports and also develop or enhance scheduled flights (SCASD) throughout the nation.

The Airline Deregulation Act of 1978 established the Essential Air Service Program (EAS). This was an early type of support program utilized by eligible airports to ensure commercial service was available to small, rural communities so that residents of those communities can access the national transportation system. The EAS program guarantees air service access for the small communities in which demand was insufficient for airlines to profitably provide air service. Eligibility criteria have become stricter over the years and currently include approximately 160 communities that qualify for subsidized service. The program subsidizes the selected airline's costs and guarantees an operating profit. The subsidy is currently capped at \$200 per passenger for communities within 210 miles of a large or medium hub airport and \$1,000 for airports located more than 210 miles from a Medium or Large Hub airport. The EAS program typically guarantees two daily frequencies and in most communities this level of frequency is low.

As part of the Wendell Ford Aviation and Reform Act for the 21<sup>st</sup> Century (Air 21), Congress established SCASD in 2000. The objective of this program has been to help small- and non-hub size airport communities enhance and develop air service levels. This program provides funding in response to specific airport grant applications. These grant applications can be proposed by a state, consortium of airport communities or by a single airport community and the incentives are broad. Incentives can range from revenue guarantees, fee waivers, marketing and promotion, consultant support, market analysis studies, etc. Since the program was first funded in 2002, almost 1,200 communities have applied and the USDOT has awarded 343 SCASD program grants worth over \$157 million.<sup>2</sup> Overall, funding for the SCASD has decreased since the program began, with approximately \$20 million appropriated in 2002 to the current level of \$7 million in 2014.

Analyses of the SCASD programs suggest that providing financial incentives, whether in the form of a revenue guarantee or marketing efforts, does not guarantee new service will be secured or successful.<sup>3</sup> However, it does increase the odds of a better chance in attracting, maintaining, and

---

<sup>2</sup> USDOT. Small Community Air Service Development Program Grant Awards through FY 2013

<sup>3</sup> Wittman, M.D. 2014. Public funding of airport incentives in the United States: The efficacy of the Small Community Air Service Development Grant program. *Transport Policy* 35: 220-228.

enhancing new flights. As the competitive environment of the domestic airline industry continues to increase, a lack of an incentive program—especially in smaller communities—can be a negative. In the last 15 years especially, carriers have come to expect some help in risk mitigation from most communities once they can demonstrate a market exists that may potentially be profitable.

### **Virginia SCASD Program Winners**

From 2002-2013, Virginia communities have received 10 SCASD awards totalling over \$5 million in funding for air service development activities. The SCASD allows no more than 40 grants to be awarded per year, and the competitiveness of the results show Virginia has been in a successful position throughout the life of the program. Grants have been awarded to five of the seven small and non-hub airports in the state. Four of the five successful communities were non-hub airports and one small hub facility. Four of the five successful communities also received more than one SCASD grant –three were awarded funds twice and one received a grant three times since 2002.

As with other communities across the U.S., the overall success of the VA SCASD winners has been mixed, with some communities expending the full allotment of funds resulting in air service improvements and other markets that were unable to use the grant money due to external market factors and carrier consolidation. Two communities have applied for SCASD grants numerous times and been unsuccessful. The overall consensus of VA airports is that the SCASDP is an essential element to sustaining air service, and they find it to be an extremely beneficial program.

Some proposed initiatives have included the expansion of new and existing air service to target markets and carriers, marketing and promotion efforts, upgrading of aircraft and development of airport shuttle bus service within its local community to increase passenger use. At least for Virginia, the SCASD program has been an invaluable resource to support air service development in small communities.

### **Local Airport Programs**

Beginning in the 1990s, community incentive programs gained popularity. The first airports to utilize incentives were the Rocky Mountain ski resort operators, in which revenue guarantees were provided to airlines to serve small local and desirable destination airports during the ski season. While the end goal was not to develop profitable air services, financial support was still used to incentivize carriers to provide nonstop service from distant points that would attract the high-value skiers in the winter season. Today, the majority of airports across the U.S. offer some type of air service incentive program.

Airport Incentive Programs are governed by the FAA, which allows airports to offer incentives for new service or target destinations within certain guidelines. Generally, the FAA leaves incentive program details up to the airport, they can contain specific targets (new market, low cost carrier, more frequency, larger aircraft, etc.) or have a general goal (to increase passenger traffic, upgauge aircraft type) and can offer both cost and marketing incentives or just one type. Cost incentives can be offered to a carrier for a maximum of two years for a specific service, unless the incentive is only to attract a new airline and then cost incentives are limited to 1 year.<sup>4</sup> Marketing and promotional incentives are not restricted to a certain timeframe. In addition, if an airport develops an incentive program, all carriers must be informed of the program and offered the incentives and the opportunity to start new service.

According to a study of airport incentive programs,<sup>5</sup> the principal incentives that airports use to attract airlines include the following:

- **Waived or reduced fees:** No charges, credits, or discounts of landing fees and other airport operations costs during a promotional period not to exceed 2 years.
- **Marketing and advertising services:** Airports either contribute or purchase marketing or advertising on behalf of airlines for services.
- **Minimum revenue guarantees:** Specific carrier agreements that provide an airline with the assurance of targeted minimum revenue levels for a specific time with a capped maximum exposure. If service hits the revenue targets, no incentive funds are expended.
- **Travel banks:** Funds deposited into accounts by local businesses that can be used to purchase air tickets by businesses and private individuals.
- **Direct subsidies:** Funds used to compensate airlines directly in exchange for a commitment to provide a community with a specified level of service. Direct subsidy programs include the U.S. DOT Essential Air Service program. Payments are made on a per-flight basis regardless of the operations financial success.

There are a handful of states that have been identified to have some type of funded air service incentive program for its commercial airports. These programs have focused on their small community airports to help develop their air service as the challenges to maintain flights have become harder. Each state program is summarized in section 3 below.

---

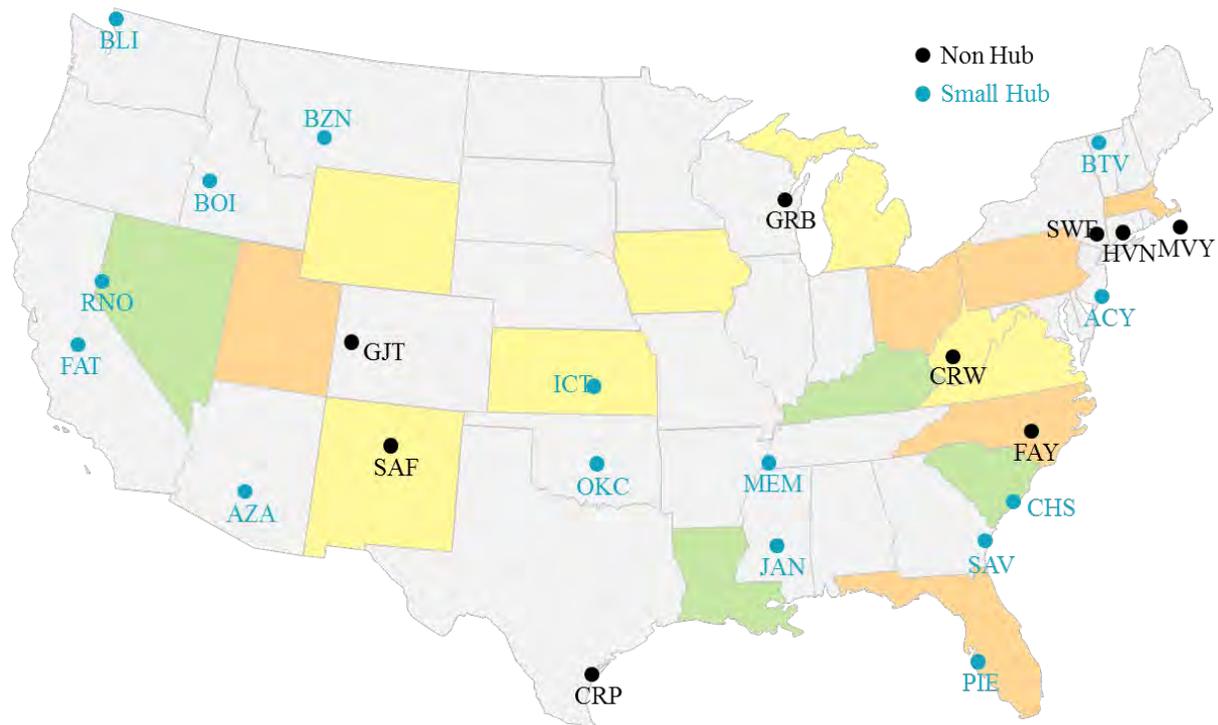
<sup>4</sup> FAA Guidelines published in 2010

<sup>5</sup> Wittman, M.D. 2014. Public funding of airport incentives in the United States: The efficacy of the Small Community Air Service Development Grant program. *Transport Policy* 35: 220-228.

## Small and Non Hub Air Service Incentive Programs

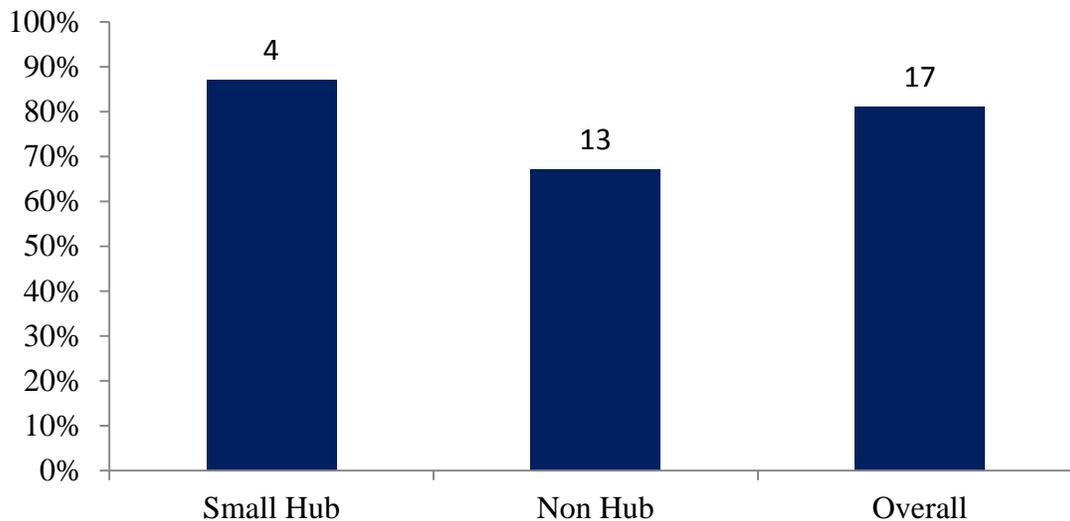
As part of Virginia study, twenty-one small- and non-hub airports were randomly selected throughout the country to better understand the prevalence of incentive programs and the elements small communities offer carriers. These small- and non-hub airports represent a geographic sampling of airports across the contiguous United States. The airports that were researched and interviewed are illustrated on the map below.

**Exhibit 3-1: Map of Small and Non Hub Airports Researched**



Of the twenty one airports, about eighty percent currently have an incentive program that offer a range of cost and marketing incentives. One of the small hubs that currently does not have a program, is planning on developing one in the future.

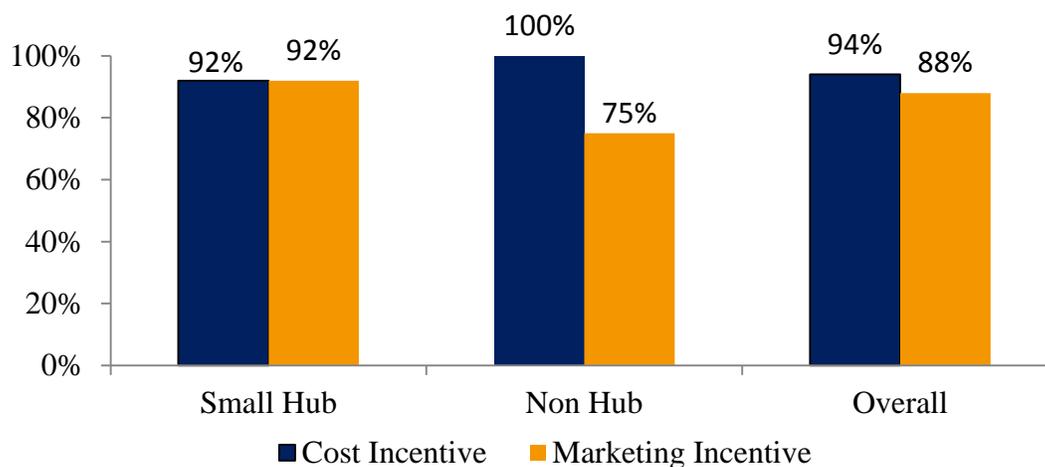
**Exhibit 3-2: Number of Researched Airports with Incentive Programs by Hub Type**



Source: InterVISTAS Consulting. Note: SAF, JAN, CRP, and BLI do not offer incentives.

Exhibit 3-3 demonstrates the elements of the programs offered by the airports interviewed. The majority of the airports offer a cost incentive as an element to their program and more than 85% provide a marketing/promotional incentive. 82% of these small communities offer both cost and marketing incentives. The cost incentives most often involve waiving landing fees, terminal rent, and in several cases, include revenue guarantee support.

**Exhibit 3-3: Share of Small and Non Hub Airports with Incentives that Offer Cost and Marketing Incentives**

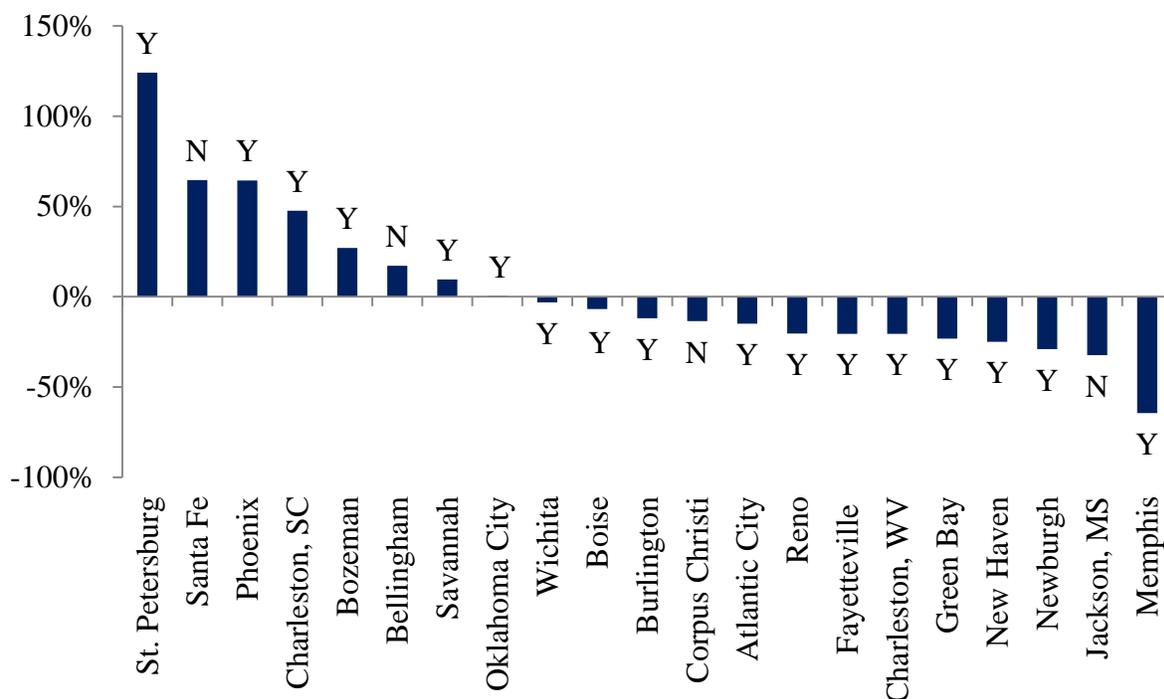


Source: InterVISTAS Consulting.

While incentive programs at airports have become important, they are just one element to the airport’s strategy at maintaining and attracting new service. Having a strong business community, desirable destination, sizeable local market with demographics and growth to support new service is critical to a carrier’s success. For this reason small- and non-hub airports have had difficulty maintaining service levels despite their incentive programs.

In the early part of last decade, when incentives began to be applied more broadly, carriers would serve a market even if the demand potential was questionable. Most of these risks resulted in unprofitable routes and service cuts or exits once the incentive period was over. All of the network carriers have examples of service attempts that were more in response to incentives than a real market opportunity. However the carriers have gotten much more sophisticated, selective, and smarter about evaluating incentives as part of a much larger picture when analyzing opportunities. Carriers prioritize market opportunities as the primary factor and although incentives are expected and factored into the assessment, they are not the driving force behind airline market decisions. As such, Exhibit 3-4 shows that having an incentive program was not exactly correlated to growth in seats at an airport over the last five years.

**Exhibit 3-4: Percent Change in Seat Capacity from 2010 to 2015 at Selected Airports**



Note: Y indicates Incentive Program

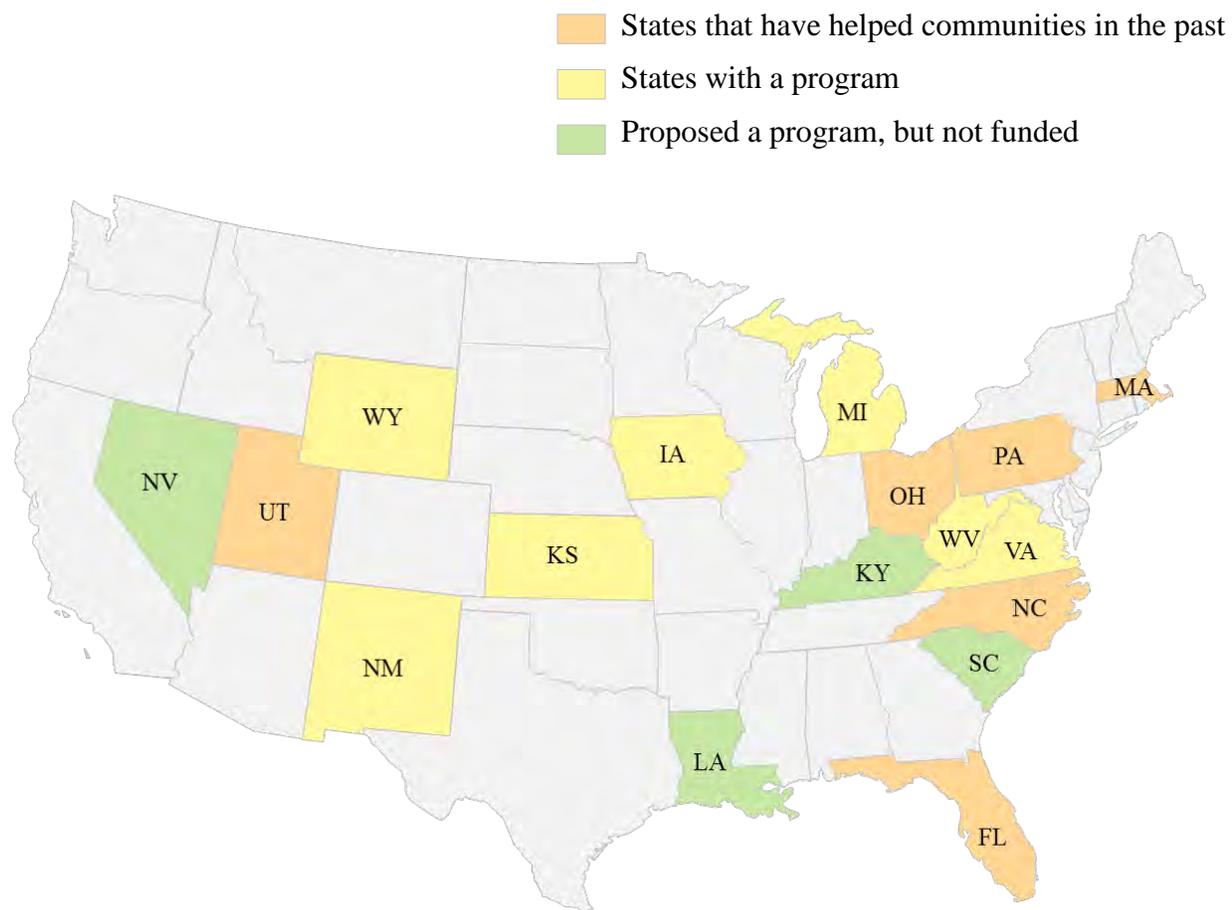
Source: Innovata SRS schedule data via Diio Mi.

## 4. Review of State Air Service Development Incentive Programs

In addition to federally funded initiatives such as SCASD and EAS, statewide air service incentive programs can be an additional source of funding. InterVISTAS performed a review of existing state air service incentive programs, conducting online literature research of programs or attempts by states to develop a formal structure. In addition, the research was followed up with interviews of representatives of each state from either the aviation agency or the airports that initiated the effort with state legislature.

The map shown in Exhibit 4-1 identifies the states reviewed in this chapter. The research presented is a sample of states therefore may not include the full extent or history of programs.

**Exhibit 4-1: State Air Service Development Programs Reviewed**



The development of a state incentive program can assist in the enhancement of existing service and promote new air service to a community. This review helped to understand the various programs each state has structured to support the development of commercial air service.

State air service incentive programs are typically managed through the Aviation division of the state's Department of Transportation, though some states alternatively managed their programs through local entities such as the Economic Development Agency. Though state incentive programs are relatively uncommon, they have become increasingly popular in the last decade and have proven to be effective in some communities. This review has helped establish a basic structure for best practices going forward. The Commonwealth of Virginia Department of Aviation can review and compare existing programs, assess their current program, and aim to initiate any specific changes to increase the effectiveness of its program.

Each program is designed to support the circumstances and dynamics of each unique community within the differing states. Throughout the research seven states were identified that currently offer an incentive program to their local airports, while four states have attempted to create a program and were unsuccessful. The section below analyzes the elements of each state program. It is important to note that in the majority of cases, the state Aeronautics/Aviation division is managing the programs, even if they were not the driving force behind the effort. As expected the funding of programs varies in both source and level; however, among the states with incentive programs, there is a belief the resources have been effective for enhancing commercial air service activity.

## **Summary of States with Successful Programs**

### **Virginia**

The Commonwealth of Virginia has worked alongside the Virginia Aviation Board (VAB) to offer funding programs in support of continued growth and improvement of the Commonwealth's airports. Currently, there are three initiatives the Commonwealth supports related to air service support that DOAV manages.

Virginia has an Air Service Development and Enhancement Program, which was established in 1985 to attract new air service and maintain or improve existing air service for its small commercial airports. Examples of eligible projects include air service studies and reports, air service data subscriptions, marketing and advertising for new or enhanced air service for the first calendar year, etc. Ineligible activities include cash incentives and planning, engineering or construction of capital projects. Projects that qualify for the Aviation Promotion Program are ineligible under the ASD and Enhancement Program.

For commercial air service support, Virginia contributes one third of the project cost up to \$20,000 for a primary medium hub, and half of cost up to \$20,000 for small, non-hub and non-primary airports. GA and reliever airports also can receive incentives of half the project cost up to \$20,000. The annual budget is \$150,000, down from \$200,000 since 2008, and the commercial airports use these funds consistently every year. The program receives financial support from aviation fuel and aircraft sales tax.

Also started in 1985 is the Aviation Promotion Program, which helps stimulate aeronautical activity and promote aviation across the Commonwealth by raising awareness in the business and public sector for both commercial and GA airports. Funding is provided to airport sponsors with the broad goal of promoting aviation activities. Eligible projects include airport and aviation displays, print media, airport flight guides, promotional videos, sponsorships of community events providing promotional benefits to the airport and additional projects.

The VAB established a \$25,000 annual ceiling per airport for commercial air carrier airports and a \$10,000 limit for general aviation airports. The maximum participation rate is based on annual enplanements; Commonwealth participation of two thirds of the project cost up to \$25,000 for less than 25,000 annual enplanements and half of the project cost for up to \$25,000 for more than 25,000 enplanements. For GA airports, Commonwealth participation of two thirds the project cost up to \$10,000 less than 25,000 annual enplanements and half of the project cost for greater than 25,000 enplanements. The annual budget for the promotion program is set at \$225,000, down from \$300,000 in 2008 and is funded by aviation fuel and aircraft sales tax.

Separately, Virginia funds the Washington Airports Task Force (WATF) in the amount of \$500,000 per year. The WATF supports efforts that drive air service development at IAD and DCA airports, two critical airports that help link Virginia's small community to the national transportation system.

## **Iowa**

Iowa began an Air Service Development Sustainment and Enhancement Program in 2005 through the Iowa DOT Department of Aviation. The program has two main components: sustainment and enhancement. The ASD Sustainment Program offers ongoing marketing and educational programs, studies, and matching funds for federal grants. The sustainment element involves an 80% state share and a 20% local match of funds. Total funds allotted for each commercial service airport have an annual cap of \$35,000, with a possible state share of \$28,000, and a \$7,000 local match.

Additional incentives involve building market share through advertising, web site enhancements, social media, and public relations efforts. The second component of Iowa's state program involves

the ASD Enhancement Program, which includes recruitment of new air service using financial incentives, market entry support, and air service and data analysis studies. There is a grant cap of 40% of unobligated funds in one year, however, there is flexibility in this percentage share. A significant local match is required to be a part of the ASD Enhancement Program. The main objective of the ASD Enhancement Program is focused on obtaining new routes, low cost service, increased capacity, lower fares, and larger aircraft.

### **New Mexico**

New Mexico's Air Service Assistance Program began in 1999, expired in 2011 and has since been renewed from 2013-2017. The program is managed by the Department of Aviation and funded through gross receipt tax. It is a 50/50 reimbursable grant through the state for small airport communities only and incentives include marketing and promotional funds of up to \$250,000 for an airport community. The program is flexible and the support can be used for new markets and additional frequency. There is no limit to the number of times in a year a community can receive incentive support on eligible activities.

### **Wyoming**

The Wyoming Air Service Enhancement Program (ASEP) started in 2004 and is managed by Wyoming Aeronautics to support its 10 small community airports. Approximately 2-3 years ago the ASEP became exclusively focused on support for communities that pursue minimum revenue guarantees. Wyoming has another program, part of their Airport Improvement Program (AIP) that is focused on providing marketing and promotional support for ASD. Both programs have a local match, the ASEP allocation includes 72% from the state and a required 28% local match while the AIP is 50/50. Wyoming Aeronautics reports to the legislature annually on ASEP results and are rigorous on how performance is measured, with airports required to help with reporting.

Unlike other states, Wyoming has established a review process. On a monthly basis, traffic data is provided by airports and close-out reports are required after a revenue guarantee contract is complete. Over the last 11 years the program has lost some funding, more recently however the level of previous investment has been returned. The state legislature requires annual reviews and a report that measure the effectiveness of the program. Financial support comes from the general fund and is approximately \$6 million every two years.

### **Michigan**

The Michigan Air Service Program is one of the oldest state programs in place. Developed in 1987 by the Michigan DOT Office of Aeronautics, incentive support is provided to airports with less than 100,000 annual passenger enplanements. There are three components to Michigan's Air

Service Program: 1) Capital Improvement and Equipment 2) Carrier Recruitment and Retention and 3) Airport Awareness.

The purpose of the Carrier Recruitment and Retention category is to maintain or increase service levels at Michigan's airports. The three elements of the Carrier Recruitment and Retention category of the Air Service Program include: 1) Feasibility studies and business plan development to recruit a carrier and expand or establish new service 2) Risk sharing with revenue guarantees to minimize risk on certain routes and 3) Cost incentive assistance for airports to waive airport fees. All costs for the program are shared on a state and local basis. The state support ranges from 50% to 80% of the costs depending on the specific incentive requested/used. The program must be authorized each year and is funded at \$300,000 annually through an aviation fuel tax.

### **West Virginia**

West Virginia Aeronautics started an incentive program in 2008-2009. The program offers \$15,000 annually to commercial airports for marketing/promotional support for air service, either existing or new campaigns. The goal of the program is to maintain and increase traffic levels and expand/enhance air service at the state's commercial airports. Funded from general revenue money, there is no local match required and no expiration of the program, although there is an annual funding process. The grant of \$15,000 must be spent in order for an airport to qualify for incentives in the next fiscal year.

### **Kansas**

This state program evolved from Wichita Airport's (ICT) incentive program ("FairFares") that was initially established in 2001. In 2006, the Kansas legislature established the Kansas Affordable Airfares Program (KAAP). ICT's program provided revenue guarantee support to attract low-fare carriers to the market. ICT was successful in attracting low cost carrier AirTran (acquired by Southwest in 2011) to Atlanta. The program has evolved from an airport-led initiative to a State initiative. The Kansas state legislature passed a statute directing the Department of Commerce to fund the initiative however the efforts were focused on ICT and West Kansas only. This initiative offered a 5 year program for \$5 million a year as long as the City and County met their requirement contribution of close to \$1 million each, for a combined total of \$7 million annually.

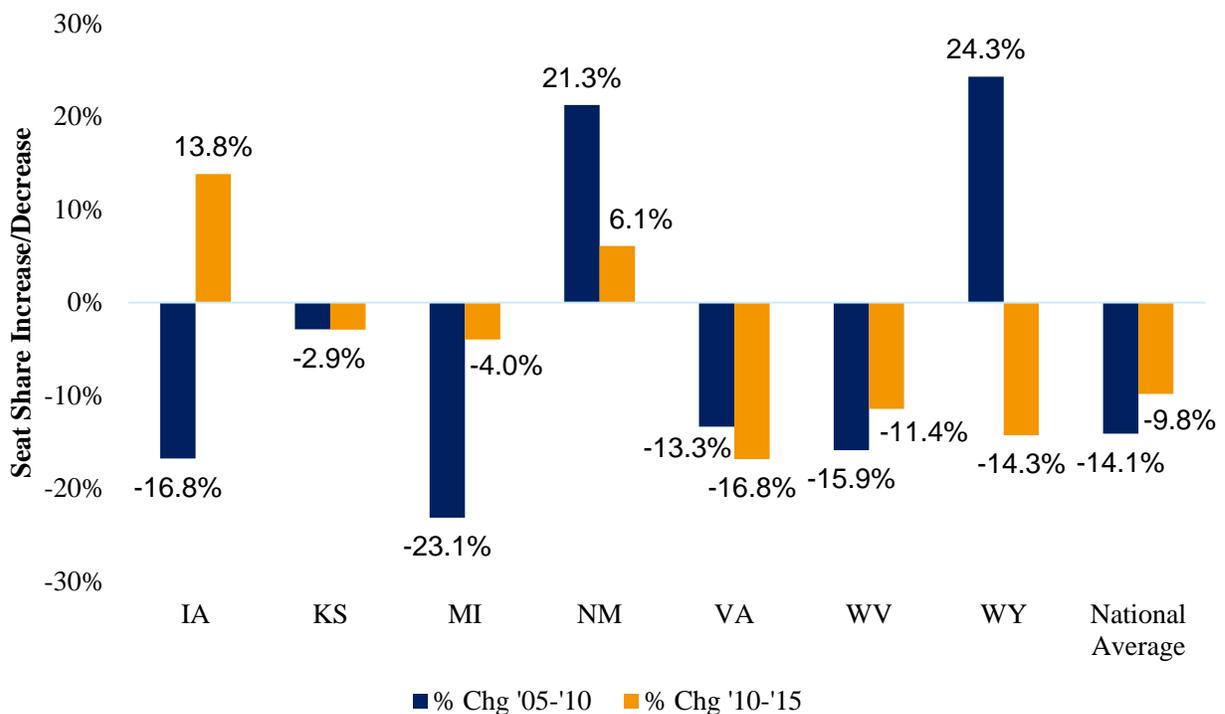
In 2006, the County and local economic development agency began managing/sponsoring the incentives. Currently, all state airports are allowed to submit a proposal; however, besides ICT, only Garden City Airport (GCK) submitted an application. GCK successfully attracted regional service to Dallas/Fort Worth (DFW) on American Airlines with the incentive support. There is a 25% local match required in the incentive program. This could be the final year of this program, as its uncertain if there will be more funding beyond June 2016. Financial support is from the

general fund for \$5 million with a required County and City match of approximately 20 percent each.

## Summary

In an effort to evaluate the impact of the implementation of state programs, InterVISTAS conducted a cursory review of one metric, seat capacity, at small and non-hubs in the U.S and compared the overall service changes between 2005 and 2010 and 2010 and 2015. As shown in Exhibit 4-2, Iowa and New Mexico are the only states with an incentive program where total seat capacity has increased between 2010 and 2015. While there are many factors that influence service/capacity decreases, it appears that certain states have been positively impacted by incentive programs that have been established. However, as the exhibit shows, many of the states with incentive programs, including the Commonwealth of Virginia, still saw losses in seat capacity despite the incentives.

**Exhibit 4-2: Seat Capacity at Small and Non- Hubs in Seven States with Ongoing Incentive Programs, Percent Change 2005-2010 and 2010-2015**



Source: Innovata SRS schedule data via Diio Mi.

## Summary of Unsuccessful and Proposed State Programs

### Maryland

The research identified that Maryland had developed an effort to help incentivize intrastate air service however it is no longer an active program. In 2000, Maryland passed a law allowing subsidized state air service to establish an intrastate route structure. The goal of the Regional Air Service Development Program was to allow underserved areas of Maryland an opportunity to connect with the largest airport in the state, Baltimore/Washington International Airport, so passengers could connect into the national air transportation system. A subsidy of \$4.25 million over a 2-year period was utilized for Hagerstown and Cumberland. Due to a lack of community involvement, low enplanements and a market that underperformed (45% average load factor), the carrier was unable to reach breakeven, and service was discontinued after 18 months. The \$4.25 million in funding was completely expended during that time period.

### Louisiana

Louisiana attempted to establish an Air Service Fund in 2010, however due to lack of support from the legislature, the program was unsuccessful. The proposal included a \$9 million incentive budget annually from existing state aviation fuel tax revenues. Unspent funds could carry over each year, however, the total unused balance was not to exceed \$30 million. The incentive funds could only support efforts to enhance or increase air service at commercial airports (including New Orleans) through awards made by the Department of Transportation and Development, Aviation Division for specific projects. Individual project costs were not to exceed \$3 million per fiscal year. The bill would have created an airport Construction Acceleration Fund with a budget of \$3.2 million per year from the existing state aviation fuel tax.

The program failed to pass due to a lack of support from the legislature. Funding of the program would have come from the aviation fuel tax, which also funds the existing Capital Improvement Projects for airport infrastructure and safety projects. There have been no further attempts to propose again to develop a state air service incentive program in Louisiana.

### Nevada

A proposed small community air service state program was focused on small commercial airports including Elko, Reno, and other small hubs in the region. The first attempt to develop a program failed, while the most recent effort was approved and funded however at the last minute was not signed into law due to other program amendments that were included, resulting in disagreements. A \$500,000 grant was approved in 2007 to recruit and retain regional commercial air service to small airports in Nevada. The grant was planned to be administered through the Nevada Commission on Tourism to establish an Elko to Reno route.

Due to state budget cuts, the proposed program was cut in 2008 and was not implemented. On their second attempt in March 2015, the Nevada Air Service Development Commission and the Nevada Air Service Development Fund was proposed through Senate Bill 125. The bill requested \$1M for fiscal year 2015-2016 and 2016-2017, with a 20 percent match to be given by the airport, city, or the sponsoring agency. Eighty percent of the fund could be used, and part of the 20 percent match could be waivers on reduction, carrier rentals, terminal, or landing fees. A proposed small community air service state program has been attempted twice, and the ability and willingness to propose again exists. Nevada will likely keep trying until it is successful.

### **South Carolina**

South Carolina's effort was driven by several commercial airports (Charleston, Columbia and Greenville) trying to develop incentive support from the State to attract Southwest Airlines. The South Carolina Air Service Incentive and Development Fund was proposed in 2010, however, not awarded. The program was to be managed through the South Carolina Aeronautics Commission. The goals of the program were to provide increased flight options, competition for air travel, and more affordable fares for the state, including regional airports. The bill proposed the Aeronautics Commission borrow \$15 million from the Insurance Reserve Fund to create an Air Service fund. Money borrowed from the Insurance Fund was to be repaid with interest. The provision passed the state house; however, legislators from the Columbia area did not allow it to pass through the Senate. In March 2011, Southwest Airlines announced operations at both Charleston International and the Greenville-Spartanburg International Airports regardless of the unpassed bill. All three South Carolina airports have individual incentive programs as well.

### **Kentucky**

The initiative to develop a state program in 2010-2011 was driven by the commercial airports including Louisville, Lexington, Owensboro, and Paducah, with predominant focus from/about Cincinnati/Covington International Airport (CVG). The airports testified in state congress and a report initiative was requested to assess the trends in declining air service across the U.S. and how certain states were responding, as well as the use of incentives.

In 2010, Delta began to formally dehub CVG, although for years prior the airline had been decreasing air service. DL cut flights significantly, down gauged aircraft to regional jets and CVG had one of the highest average fare levels in the U.S. CVG is the most active/largest commercial airport in the Commonwealth, generating considerable economic benefit and serves as an important air service link for many communities in the central Midwest region. Various proposed funding options for a state incentive program were considered and a loan fund structure was proposed, however the Commonwealth did not have the sufficient funds or political support to develop a formal program and the effort was unsuccessful.

## 5. Findings, Broader Discussion, and Recommendations

As regional aircraft continued to be retired and replaced by larger planes, small communities face a real challenge to retain their service and passenger levels. Smaller airports within a 1-4 hour drive of a large airport are especially at risk due to these factors and face fierce competition. In even more rural states, a six hour drive to a large hub airport is a threat to a small community.

Of the seven states with an ongoing state incentive program, Michigan’s and Virginia’s programs have been in effect the longest. The newest program was established in West Virginia in 2008-2009. State program elements range from comprehensive requirements in Wyoming and Michigan to more straightforward structures like West Virginia. Some programs have measurements in place to systematically review the results, while others have a less formal process. All states except one (WV) require a local match of funds. A local match helps to share the risk and keep the community engaged with a “stake in the game.” These programs have been effective when the community is committed to the potential service and have demonstrated their support for the proposed service through financial support. State funding levels vary, with some communities only receiving \$15,000 per year while others are awarded several million dollars in a year.

The research has shown that among the existing state incentive programs the majority support their small community airports and there is a common belief that these resources have generally been effective and that long-term support is important. Additional funding and annual appropriations is a common objective for each program. Based on the information learned, it appears the existing state programs can provide experience and insight to help possibly enhance Virginia’s program and further discussions with these states will likely prove to be helpful.

### Exhibit 5-1: Summary of State Incentive Program Common Elements

State	Comm. Airports	Mgd. by DOA/DOT	Started	Funded	Local Match Required	Cost Waivers	Mktg/Promo	Rev Guar.
IA	8	Y	2005	Aviation fuel tax	Y	Y	Y	N
KS	9	N	2001	General fund	Y	Y	Y	Y
MI	17	Y	1987	Aviation fuel tax	Y	Y	Y	N
NM	9	Y	1999	Gross receipt tax	Y	N	Y	N
VA	7	Y	1980s	Aviation fuel and sales tax	Y	N	Y	N
WY	10	Y	2004	General fund	Y	Y	Y	Y
WV	7	N	2009	General rev. fund	N	N	Y	N

Source: InterVISTAS Consulting.

## Exhibit 5-2: Summary of State Program Budget Elements

State	Cap Funding/ Annual Budget
IA	\$35k per commercial airport; \$28k state share, \$7k local
KS	Annual budget: \$5m state, \$1.6m City and County split match
MI	\$300k per year
NM	\$250k per airport, no limit on # of times
VA	\$20k per airport; \$500k- Task Force for IAD, DCA
WY	\$2.8m every 2 yrs., \$6m in recent review
WV	\$15k per airport

Source: InterVISTAS Consulting.

In general, incentive programs have helped small communities remain competitive and in some cases have resulted in successful attraction of new and/or increased service and traffic. Virginia’s commercial airports have kept pace with the national trend, taking advantage of incentives as a tool to help develop air service. The Commonwealth identified early on that it wanted to prioritize support for commercial air service development —demonstrating the states’ proactive position towards its aviation system. In addition, Virginia’s commercial airports have utilized SCASD grants since the inception of the program, many were successful in securing funds and have used these resources to help improve air service activity. Although some of the results have been mixed, several have experienced real improvement.

InterVISTAS’ review of other small communities and state programs has identified some best practices, key principles and techniques that can be used to offset start-up costs for airlines, add destinations to specific markets, and maintain affordable airfare. Although incentives are not the leading factor for attracting and developing air service, there is growing agreement it is necessary for communities to demonstrate to carriers they will help offset the risk of new service.

It appears that successful state programs start with commitment to their airports and partnership with communities, that there is a vision that commercial service is good for business state-wide, and that effort and investment are necessary. It is also apparent that good state programs develop metrics, systems or reporting procedures to help document and measure development and that improvement is quantitative and qualitative in nature. Measuring development helps states as they try to secure future funding and provides political decision makers with information on how airport constituents are benefitting from an incentive program. Tracking the effectiveness can also provide

valuable feedback and insight from airports in the evolution of the airline industry demands and can help a state respond better within its incentive program to new issues that arise.

It is difficult to predict the future of these incentive programs given the uncertainty of market changes, funding, expiration clauses, and potential lack of political support. However, it is clear the greater Virginia aviation community has been working together to find implementable solutions and that the Commonwealth and its commercial airports are committed to air service development efforts. Starting from a committed position will help the program weather the industry's future challenges.



# **VIRGINIA COMMERCIAL AIR SERVICE STRATEGIC REVIEW**

## **Summary by Hub Size 7\_15**

Domestic

Summary by Hub Size 07-15

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
					Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
9	SFO	San Francisco	Large	California	66	71	5	12,909	15,090	16.9%	1,532,635	2,075,834	35.4%
6	SEA	Seattle	Large	Washington	75	83	8	13,871	16,218	16.9%	1,730,528	2,173,917	25.6%
25	MIA	Miami	Large	Florida	47	56	9	6,671	7,321	9.7%	870,660	1,043,967	19.9%
7	CLT	Charlotte	Large	North Carolina	101	123	22	18,845	20,919	11.0%	1,778,084	2,098,422	18.0%
4	LAX	Los Angeles	Large	California	89	99	10	22,264	21,621	-2.9%	2,582,371	2,954,869	14.4%
14	BOS	Boston	Large	Massachusetts	77	74	-3	14,591	14,579	-0.1%	1,405,940	1,576,015	12.1%
27	PDX	Portland, OR	Large	Oregon	47	57	10	8,219	7,653	-6.9%	847,157	938,915	10.8%
<b>21</b>	<b>DCA</b>	<b>Washington National</b>	<b>Large</b>	<b>Virginia</b>	<b>72</b>	<b>82</b>	<b>10</b>	<b>11,732</b>	<b>12,335</b>	<b>5.1%</b>	<b>1,130,674</b>	<b>1,238,612</b>	<b>9.5%</b>
3	DFW	Dallas/Fort Worth	Large	Texas	131	147	16	26,671	26,130	-2.0%	2,892,506	2,988,866	3.3%
1	ATL	Atlanta	Large	Georgia	177	158	-19	39,707	34,527	-13.0%	4,408,203	4,554,111	3.3%
16	LGA	New York LaGuardia	Large	New York	71	68	-3	16,328	14,881	-8.9%	1,501,754	1,538,202	2.4%
11	MSP	Minneapolis/St. Paul	Large	Minnesota	132	120	-12	16,990	15,899	-6.4%	1,799,397	1,842,497	2.4%
17	JFK	New York Kennedy	Large	New York	67	63	-4	13,108	11,521	-12.1%	1,467,531	1,468,286	0.1%
26	FLL	Fort Lauderdale	Large	Florida	55	66	11	7,154	6,732	-5.9%	970,416	968,973	-0.1%
5	DEN	Denver	Large	Colorado	138	145	7	25,438	22,307	-12.3%	2,630,746	2,625,442	-0.2%
22	MDW	Chicago Midway	Large	Illinois	61	71	10	9,189	8,202	-10.7%	1,186,953	1,183,296	-0.3%
24	SAN	San Diego	Large	California	50	50	0	9,023	7,364	-18.4%	1,080,486	1,055,091	-2.4%
20	BWI	Baltimore	Large	Maryland	62	67	5	10,338	8,975	-13.2%	1,301,431	1,261,511	-3.1%
2	ORD	Chicago O'Hare	Large	Illinois	142	161	19	35,846	34,229	-4.5%	3,479,130	3,347,666	-3.8%
19	EWR	New York Newark	Large	New Jersey	89	83	-6	14,258	13,052	-8.5%	1,438,476	1,362,644	-5.3%
13	DTW	Detroit	Large	Michigan	127	109	-18	17,938	15,249	-15.0%	1,759,744	1,602,854	-8.9%
10	PHX	Phoenix	Large	Arizona	91	78	-13	18,405	15,342	-16.6%	2,290,689	2,075,195	-9.4%
23	SLC	Salt Lake City	Large	Utah	106	83	-23	13,669	9,879	-27.7%	1,228,326	1,112,060	-9.5%
8	LAS	Las Vegas	Large	Nevada	133	113	-20	16,936	13,562	-19.9%	2,336,829	2,095,890	-10.3%
12	IAH	Houston Bush	Large	Texas	116	116	0	21,332	16,052	-24.8%	1,862,061	1,611,234	-13.5%
18	PHL	Philadelphia	Large	Pennsylvania	90	95	5	17,639	15,362	-12.9%	1,695,562	1,451,466	-14.4%
15	MCO	Orlando	Large	Florida	87	76	-11	13,510	10,260	-24.1%	1,825,191	1,547,786	-15.2%
28	TPA	Tampa	Large	Florida	65	64	-1	8,048	6,009	-25.3%	986,751	825,638	-16.3%
29	HNL	Honolulu	Large	Hawaii	32	30	-2	7,644	5,452	-28.7%	939,191	782,008	-16.7%
<b>30</b>	<b>IAD</b>	<b>Washington Dulles</b>	<b>Large</b>	<b>Virginia</b>	<b>80</b>	<b>80</b>	<b>0</b>	<b>11,475</b>	<b>8,234</b>	<b>-28.2%</b>	<b>1,010,135</b>	<b>774,565</b>	<b>-23.3%</b>
<b>Average/Total</b>					<b>2,676</b>	<b>2,688</b>	<b>12</b>	<b>479,748</b>	<b>434,956</b>	<b>-9.3%</b>	<b>51,969,557</b>	<b>52,175,832</b>	<b>0.4%</b>

Domestic

Summary by Hub Size 07-15

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
					Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
26	BUF	Buffalo	Medium	New York	22	19	-3	3,282	2,629	-19.9%	301,252	261,524	-13.2%
27	RSW	Fort Myers	Medium	Florida	28	30	2	2,369	1,786	-24.6%	290,709	247,338	-14.9%
30	OMA	Omaha	Medium	Nebraska	23	22	-1	2,884	2,045	-29.1%	254,823	214,275	-15.9%
28	PBI	West Palm Beach	Medium	Florida	21	18	-3	2,252	1,759	-21.9%	287,003	239,650	-16.5%
9	SJC	San Jose	Medium	California	26	27	1	5,597	4,037	-27.9%	658,245	537,968	-18.3%
11	SMF	Sacramento	Medium	California	34	29	-5	5,499	3,990	-27.4%	647,326	513,396	-20.7%
13	PIT	Pittsburgh	Medium	Pennsylvania	62	44	-18	7,134	4,822	-32.4%	574,118	452,699	-21.1%
23	BDL	Hartford	Medium	Connecticut	35	25	-10	3,624	2,606	-28.1%	366,853	284,921	-22.3%
2	STL	St. Louis	Medium	Missouri	64	58	-6	9,854	7,017	-28.8%	917,809	701,042	-23.6%
21	MKE	Milwaukee	Medium	Wisconsin	51	31	-20	6,782	3,240	-52.2%	459,609	345,771	-24.8%
7	MCI	Kansas City	Medium	Missouri	65	42	-23	8,025	4,735	-41.0%	759,191	569,313	-25.0%
24	JAX	Jacksonville, FL	Medium	Florida	33	26	-7	3,716	2,666	-28.3%	373,444	278,867	-25.3%
6	OAK	Oakland	Medium	California	36	41	5	6,886	4,390	-36.2%	915,020	627,362	-31.4%
14	CLE	Cleveland	Medium	Ohio	75	35	-40	9,669	4,262	-55.9%	676,875	445,768	-34.1%
29	BUR	Burbank	Medium	California	13	14	1	3,044	2,105	-30.8%	372,983	235,854	-36.8%
25	ABQ	Albuquerque	Medium	New Mexico	44	25	-19	4,279	2,381	-44.4%	456,563	272,685	-40.3%
31	ONT	Ontario	Medium	California	32	13	-19	4,037	1,783	-55.8%	439,245	214,172	-51.2%
22	CVG	Cincinnati	Medium	Ohio	112	48	-64	13,248	4,161	-68.6%	874,259	345,657	-60.5%
<b>Average/Total</b>					<b>1,227</b>	<b>1,019</b>	<b>-209</b>	<b>164,520</b>	<b>116,117</b>	<b>-29.4%</b>	<b>15,976,649</b>	<b>13,320,606</b>	<b>-16.6%</b>

Domestic

Summary by Hub Size 07-15

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats			
					Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.	
58	ECP	Panama City, FL	Small	Florida	-	11	11	-	557	-	-	-	56,541	-
67	AZA	Phoenix Mesa	Small	Arizona	-	34	34	-	330	-	-	-	52,780	-
57	SFB	Orlando Sanford	Small	Florida	24	56	32	253	597	136.0%	37,950	101,522	167.5%	
64	PIE	Tampa	Small	Florida	21	42	21	251	449	78.9%	39,738	76,679	93.0%	
68	BLI	Bellingham	Small	Washington	5	8	3	311	326	4.8%	26,728	38,238	43.1%	
32	MYR	Myrtle Beach	Small	South Carolina	15	31	16	1,040	1,113	7.0%	101,285	138,287	36.5%	
52	BZN	Bozeman	Small	Montana	11	14	3	750	689	-8.1%	52,254	68,404	30.9%	
53	FAR	Fargo	Small	North Dakota	6	10	4	524	650	24.0%	34,567	44,722	29.4%	
6	CHS	Charleston, SC	Small	South Carolina	16	22	6	1,905	2,086	9.5%	145,426	184,456	26.8%	
66	ACY	Atlantic City	Small	New Jersey	8	11	3	376	396	5.3%	49,770	60,996	22.6%	
17	GRR	Grand Rapids	Small	Michigan	15	21	6	1,729	1,533	-11.3%	113,130	135,394	19.7%	
4	JNU	Juneau	Small	Alaska	15	14	-1	1,715	2,112	23.1%	78,858	88,073	11.7%	
37	LEX	Lexington	Small	Kentucky	13	15	2	1,278	1,052	-17.7%	63,590	68,476	7.7%	
49	MAF	Midland/Odessa	Small	Texas	8	6	-2	747	823	10.2%	68,940	73,150	6.1%	
25	GSP	Greenville, SC	Small	South Carolina	18	18	0	1,776	1,361	-23.4%	97,112	102,500	5.5%	
24	DSM	Des Moines	Small	Iowa	18	18	0	1,941	1,361	-29.9%	111,934	118,000	5.4%	
42	CAK	Akron	Small	Ohio	13	14	1	1,138	932	-18.1%	85,838	89,306	4.0%	
23	PWM	Portland, ME	Small	Maine	16	12	-4	1,599	1,367	-14.5%	112,234	114,875	2.4%	
33	MSN	Madison	Small	Wisconsin	16	10	-6	1,555	1,103	-29.1%	95,404	96,437	1.1%	
55	FSD	Sioux Falls	Small	South Dakota	8	10	2	700	649	-7.3%	47,871	46,918	-2.0%	
54	EUG	Eugene	Small	Oregon	9	9	0	924	649	-29.8%	48,313	47,342	-2.0%	
26	FAI	Fairbanks	Small	Alaska	25	18	-7	1,312	1,331	1.4%	79,901	75,325	-5.7%	
35	ICT	Wichita	Small	Kansas	12	11	-1	1,389	1,065	-23.3%	100,017	91,098	-8.9%	
27	SAV	Savannah	Small	Georgia	16	17	1	1,487	1,299	-12.6%	119,262	107,791	-9.6%	
39	PNS	Pensacola	Small	Florida	9	13	4	1,368	987	-27.9%	96,346	86,981	-9.7%	
11	KOA	Kona	Small	Hawaii	13	11	-2	1,981	1,638	-17.3%	195,147	175,657	-10.0%	
31	XNA	Fayetteville, AR	Small	Arkansas	17	13	-4	1,423	1,118	-21.4%	81,952	73,655	-10.1%	
41	CID	Cedar Rapids	Small	Iowa	10	12	2	1,212	945	-22.0%	65,902	58,700	-10.9%	
36	LIH	Kauai Island	Small	Hawaii	6	9	3	1,468	1,062	-27.7%	173,063	153,346	-11.4%	
<b>2</b>	<b>RIC</b>	<b>Richmond</b>	<b>Small</b>	<b>Virginia</b>	<b>21</b>	<b>18</b>	<b>-3</b>	<b>2,943</b>	<b>2,306</b>	<b>-21.6%</b>	<b>217,300</b>	<b>192,025</b>	<b>-11.6%</b>	
51	SGF	Springfield, MO	Small	Missouri	12	10	-2	1,037	727	-29.9%	56,477	49,647	-12.1%	
34	LGB	Long Beach	Small	California	11	12	1	1,241	1,071	-13.7%	162,514	140,650	-13.5%	
46	BIL	Billings	Small	Montana	16	14	-2	1,013	875	-13.6%	59,848	51,507	-13.9%	
44	MDT	Harrisburg	Small	Pennsylvania	12	9	-3	1,362	900	-33.9%	72,516	61,526	-15.2%	
18	TYS	Knoxville	Small	Tennessee	20	17	-3	2,014	1,476	-26.7%	112,891	93,858	-16.9%	
38	BTV	Burlington, VT	Small	Vermont	13	11	-2	1,335	988	-26.0%	83,758	68,902	-17.7%	
45	FAT	Fresno	Small	California	11	10	-1	1,525	875	-42.6%	77,434	63,199	-18.4%	

Domestic

Summary by Hub Size 07-15

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
					Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
13	ALB	Albany, NY	Small	New York	21	19	-2	2,155	1,620	-24.8%	166,598	135,724	-18.5%
60	PSP	Palm Springs	Small	California	10	9	-1	901	510	-43.4%	48,763	39,599	-18.8%
15	GEG	Spokane	Small	Washington	14	11	-3	2,231	1,592	-28.6%	213,806	171,765	-19.7%
19	SYR	Syracuse	Small	New York	16	16	0	2,126	1,464	-31.1%	136,454	108,579	-20.4%
47	HSV	Huntsville	Small	Alabama	12	9	-3	1,265	861	-31.9%	75,626	59,860	-20.8%
3	SDF	Louisville	Small	Kentucky	28	20	-8	3,203	2,178	-32.0%	242,571	186,960	-22.9%
56	ITO	Hilo	Small	Hawaii	4	3	-1	1,003	619	-38.3%	97,096	74,207	-23.6%
22	GSO	Greensboro	Small	North Carolina	20	14	-6	2,205	1,391	-36.9%	133,201	100,458	-24.6%
7	BOI	Boise	Small	Idaho	24	18	-6	2,606	1,853	-28.9%	229,804	172,568	-24.9%
<b>5</b>	<b>ORF</b>	<b>Norfolk</b>	<b>Small</b>	<b>Virginia</b>	<b>25</b>	<b>18</b>	<b>-7</b>	<b>2,937</b>	<b>2,087</b>	<b>-28.9%</b>	<b>230,764</b>	<b>171,084</b>	<b>-25.9%</b>
14	DAY	Dayton	Small	Ohio	22	15	-7	2,465	1,600	-35.1%	162,116	120,057	-25.9%
65	SRQ	Sarasota	Small	Florida	10	6	-4	630	420	-33.3%	62,720	46,422	-26.0%
12	TUL	Tulsa	Small	Oklahoma	23	20	-3	2,527	1,623	-35.8%	213,711	157,369	-26.4%
16	ROC	Rochester, NY	Small	New York	21	16	-5	2,332	1,587	-31.9%	169,442	124,498	-26.5%
43	CAE	Columbia, SC	Small	South Carolina	14	9	-5	1,411	922	-34.7%	76,330	55,738	-27.0%
63	FNT	Flint	Small	Michigan	9	7	-2	862	466	-45.9%	59,432	43,265	-27.2%
29	LIT	Little Rock	Small	Arkansas	21	14	-7	1,974	1,290	-34.7%	157,317	111,872	-28.9%
59	LBB	Lubbock	Small	Texas	7	6	-1	822	553	-32.7%	76,173	51,547	-32.3%
28	HPN	Westchester County	Small	New York	14	16	2	1,778	1,293	-27.3%	117,695	79,645	-32.3%
10	BHM	Birmingham, AL	Small	Alabama	28	18	-10	2,470	1,659	-32.8%	223,853	150,736	-32.7%
9	RNO	Reno	Small	Nevada	19	16	-3	2,644	1,702	-35.6%	320,211	199,469	-37.7%
21	ELP	El Paso	Small	Texas	18	12	-6	2,054	1,407	-31.5%	241,837	149,477	-38.2%
20	TUS	Tucson	Small	Arizona	22	13	-9	2,425	1,444	-40.5%	236,649	145,212	-38.6%
62	AMA	Amarillo	Small	Texas	7	5	-2	783	492	-37.2%	66,370	40,554	-38.9%
48	JAN	Jackson, MS	Small	Mississippi	13	6	-7	1,259	836	-33.6%	94,054	57,241	-39.1%
8	PVD	Providence	Small	Rhode Island	24	16	-8	3,429	1,850	-46.0%	300,277	182,002	-39.4%
50	COS	Colorado Springs	Small	Colorado	16	10	-6	1,703	773	-54.6%	121,996	64,829	-46.9%
30	MHT	Manchester, NH	Small	New Hampshire	19	13	-6	2,423	1,178	-51.4%	237,272	113,670	-52.1%
61	ISP	Long Island Islip	Small	New York	11	6	-5	1,321	493	-62.7%	153,534	59,407	-61.3%
1	MEM	Memphis	Small	Tennessee	82	38	-44	8,430	2,608	-69.1%	640,517	209,697	-67.3%
<b>Average/Total</b>					<b>1,053</b>	<b>990</b>	<b>-63</b>	<b>108,996</b>	<b>77,169</b>	<b>-29.2%</b>	<b>8,471,459</b>	<b>6,730,474</b>	<b>-20.6%</b>

Domestic

Summary by Hub Size 07-15

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats			
					Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.	
85	PGD	Punta Gorda, FL	Nonhub	Florida	-	22	22	-	225	-	-	-	37,493	-
112	KEH	Kenmore Air Harbor	Nonhub	Washington	-	7	7	-	149	-	-	-	894	-
115	DHB	Deer Harbor	Nonhub	Washington	-	2	2	-	141	-	-	-	846	-
123	ESD	Eastsound	Nonhub	Washington	-	2	2	-	124	-	-	-	1,116	-
158	IAG	Niagara Falls	Nonhub	New York	-	6	6	-	68	-	-	-	9,241	-
163	ORH	Worcester	Nonhub	Massachusetts	-	2	2	-	62	-	-	-	6,200	-
164	LCK	Columbus Rickenbaker, OH	Nonhub	Ohio	-	6	6	-	61	-	-	-	10,269	-
165	BKG	Branson	Nonhub	Missouri	-	6	6	-	60	-	-	-	5,340	-
167	DSI	Destin, FL	Nonhub	Florida	-	4	4	-	59	-	-	-	590	-
168	LUK	Cincinnati	Nonhub	Ohio	-	3	3	-	59	-	-	-	1,770	-
171	HOB	Hobbs	Nonhub	New Mexico	-	1	1	-	51	-	-	-	2,550	-
174	PKD	Atlanta	Nonhub	Georgia	-	3	3	-	43	-	-	-	430	-
175	PVU	Provo	Nonhub	Utah	-	3	3	-	38	-	-	-	5,928	-
176	DXE	Madison, MS	Nonhub	Mississippi	-	3	3	-	36	-	-	-	360	-
177	MMU	Morristown	Nonhub	New Jersey	-	2	2	-	34	-	-	-	1,020	-
178	OLV	Olive Branch, MS	Nonhub	Mississippi	-	4	4	-	32	-	-	-	320	-
179	USA	Concord, NC	Nonhub	North Carolina	-	3	3	-	32	-	-	-	5,455	-
180	GCW	Grand Canyon	Nonhub	Arizona	-	1	1	-	31	-	-	-	186	-
181	MMH	Mammoth Lakes	Nonhub	California	-	1	1	-	31	-	-	-	2,356	-
184	NEW	New Orleans, LA	Nonhub	Louisiana	-	2	2	-	27	-	-	-	270	-
187	FRG	Farmingdale	Nonhub	New York	-	1	1	-	18	-	-	-	540	-
190	OGD	Ogden, UT	Nonhub	Utah	-	1	1	-	9	-	-	-	1,424	-
173	YNG	Youngstown	Nonhub	Ohio	1	4	3	2	45	2150.0%	-	300	7,536	2412.0%
114	LBE	Latrobe	Nonhub	Pennsylvania	1	5	4	62	147	137.1%	-	2,108	25,407	1105.3%
67	TTN	Philadelphia	Nonhub	New Jersey	2	11	9	192	279	45.3%	-	6,035	38,502	538.0%
73	ISN	Williston	Nonhub	North Dakota	1	3	2	81	259	219.8%	-	2,430	12,950	432.9%
90	SAF	Santa Fe	Nonhub	New Mexico	2	3	1	97	201	107.2%	-	1,843	9,588	420.2%
106	MHK	Manhattan	Nonhub	Kansas	1	2	1	81	155	91.4%	-	1,539	7,564	391.5%
126	COU	Columbia, MO	Nonhub	Missouri	1	2	1	108	122	13.0%	-	2,052	6,880	235.3%
140	ROW	Roswell	Nonhub	New Mexico	2	1	-1	81	93	14.8%	-	1,539	4,650	202.1%
170	SCK	Sacramento	Nonhub	California	1	2	1	22	53	140.9%	-	3,300	8,728	164.5%
88	STS	Santa Rosa	Nonhub	California	2	4	2	93	210	125.8%	-	7,068	15,960	125.8%
57	MOT	Minot	Nonhub	North Dakota	1	4	3	93	320	244.1%	-	9,575	20,093	109.8%
185	UST	St. Augustine, FL	Nonhub	Florida	1	2	1	7	22	214.3%	-	1,092	2,064	89.0%
48	DRO	Durango	Nonhub	Colorado	3	3	0	333	379	13.8%	-	14,223	23,167	62.9%
130	EAT	Wenatchee	Nonhub	Washington	1	1	0	155	119	-23.2%	-	5,735	9,044	57.7%
159	ALW	Walla Walla	Nonhub	Washington	1	1	0	89	68	-23.6%	-	3,293	5,168	56.9%
92	LCH	Lake Charles	Nonhub	Louisiana	1	2	1	178	198	11.2%	-	6,332	9,887	56.1%
141	PUW	Pullman	Nonhub	Washington	2	1	-1	124	92	-25.8%	-	4,588	6,992	52.4%
39	AGS	Augusta, GA	Nonhub	Georgia	2	2	0	379	424	11.9%	-	17,399	26,411	51.8%
111	HTS	Huntington	Nonhub	West Virginia	4	5	1	199	150	-24.6%	-	8,544	12,902	51.0%
78	BRO	Brownsville	Nonhub	Texas	1	3	2	186	241	29.6%	-	8,897	13,081	47.0%
117	LPS	Lopez Island	Nonhub	Washington	1	2	1	101	141	39.6%	-	606	846	39.6%
118	RCE	Roche Harbor	Nonhub	Washington	1	2	1	101	141	39.6%	-	606	846	39.6%
120	WSX	Westsound	Nonhub	Washington	1	2	1	101	141	39.6%	-	606	846	39.6%
86	MLB	Melbourne, FL	Nonhub	Florida	2	2	0	172	220	27.9%	-	14,812	20,593	39.0%
28	PSC	Pasco	Nonhub	Washington	6	9	3	579	509	-12.1%	-	29,839	41,208	38.1%
42	BIS	Bismarck	Nonhub	North Dakota	4	7	3	311	412	32.5%	-	20,552	28,182	37.1%
31	FCA	Kalispell	Nonhub	Montana	6	10	4	509	502	-1.4%	-	33,322	42,642	28.0%
18	TVC	Traverse City	Nonhub	Michigan	6	7	1	549	590	7.5%	-	32,976	41,735	26.6%

Domestic

Summary by Hub Size 07-15

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
					Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
13	AVL	Asheville	Nonhub	North Carolina	8	10	2	766	611	-20.2%	36,991	46,716	26.3%
146	GTR	Columbus	Nonhub	Mississippi	1	1	0	88	88	0.0%	3,520	4,400	25.0%
2	LKE	Seattle	Nonhub	Washington	5	7	2	775	968	24.9%	4,650	5,808	24.9%
68	ELM	Elmira/Corning	Nonhub	New York	3	5	2	328	278	-15.2%	13,765	17,113	24.3%
102	FLG	Flagstaff	Nonhub	Arizona	1	1	0	186	169	-9.1%	6,882	8,450	22.8%
33	BGR	Bangor	Nonhub	Maine	8	7	-1	644	498	-22.7%	29,389	35,380	20.4%
160	GUC	Gunnison	Nonhub	Colorado	1	2	1	93	63	-32.3%	3,441	4,070	18.3%
133	DIK	Dickinson	Nonhub	North Dakota	2	2	0	162	113	-30.2%	4,860	5,650	16.3%
37	GNV	Gainesville	Nonhub	Florida	4	4	0	377	436	15.6%	18,873	21,686	14.9%
41	GJT	Grand Junction	Nonhub	Colorado	4	7	3	514	417	-18.9%	21,352	24,218	13.4%
45	FAY	Fayetteville, NC	Nonhub	North Carolina	2	3	1	403	406	0.7%	20,230	22,872	13.1%
27	MSO	Missoula	Nonhub	Montana	10	12	2	636	515	-19.0%	37,924	42,774	12.8%
16	CHO	Charlottesville	Nonhub	Virginia	7	6	-1	668	594	-11.1%	26,021	29,190	12.2%
103	SPI	Springfield	Nonhub	Illinois	3	4	1	157	163	3.8%	8,350	9,310	11.5%
12	RAP	Rapid City	Nonhub	South Dakota	5	9	4	547	612	11.9%	35,253	39,140	11.0%
26	LFT	Lafayette	Nonhub	Louisiana	4	4	0	612	519	-15.2%	25,946	28,756	10.8%
20	PIA	Peoria	Nonhub	Illinois	7	11	4	590	578	-2.0%	31,546	34,705	10.0%
83	TYR	Tyler	Nonhub	Texas	2	2	0	325	228	-29.8%	10,430	11,400	9.3%
11	CHA	Chattanooga	Nonhub	Tennessee	10	8	-2	726	626	-13.8%	35,675	38,426	7.7%
166	GGG	Longview	Nonhub	Texas	1	1	0	93	60	-35.5%	2,790	3,000	7.5%
34	JAC	Jackson, WY	Nonhub	Wyoming	6	9	3	421	497	18.1%	54,639	58,513	7.1%
119	RSJ	Rosario (US)	Nonhub	Washington	1	2	1	132	141	6.8%	792	846	6.8%
149	GCC	Gillette	Nonhub	Wyoming	1	2	1	146	87	-40.4%	4,094	4,350	6.3%
104	MTJ	Montrose	Nonhub	Colorado	4	5	1	220	161	-26.8%	9,969	10,573	6.1%
108	FRD	Friday Harbor	Nonhub	Washington	1	2	1	120	155	29.2%	1,320	1,395	5.7%
100	LYH	Lynchburg	Nonhub	Virginia	2	1	-1	192	172	-10.4%	8,381	8,535	1.8%
96	GFK	Grand Forks	Nonhub	North Dakota	2	4	2	173	186	7.5%	12,841	12,979	1.1%
147	VLD	Valdosta	Nonhub	Georgia	1	1	0	89	87	-2.2%	4,310	4,350	0.9%
15	EYW	Key West	Nonhub	Florida	7	6	-1	1,047	597	-43.0%	34,155	34,388	0.7%
21	MFR	Medford	Nonhub	Oregon	8	8	0	927	576	-37.9%	41,967	42,188	0.5%
154	BQK	Brunswick	Nonhub	Georgia	1	1	0	93	80	-14.0%	4,020	4,000	-0.5%
81	CPR	Casper	Nonhub	Wyoming	3	3	0	357	234	-34.5%	12,815	12,744	-0.6%
84	LRD	Laredo	Nonhub	Texas	3	4	1	275	227	-17.5%	14,047	13,935	-0.8%
32	RDM	Redmond	Nonhub	Oregon	8	6	-2	722	499	-30.9%	32,220	31,918	-0.9%
55	GTF	Great Falls	Nonhub	Montana	6	7	1	335	337	0.6%	23,126	22,642	-2.1%
80	DAB	Daytona Beach	Nonhub	Florida	2	2	0	244	234	-4.1%	27,571	26,843	-2.6%
1	ACK	Nantucket	Nonhub	Massachusetts	9	9	0	2,648	2,179	-17.7%	40,378	38,869	-3.7%
131	DHN	Dothan	Nonhub	Alabama	1	1	0	147	117	-20.4%	6,130	5,850	-4.6%
58	OAJ	Jacksonville, NC	Nonhub	North Carolina	2	2	0	360	308	-14.4%	18,530	17,362	-6.3%
6	FWA	Fort Wayne	Nonhub	Indiana	9	12	3	881	657	-25.4%	40,980	38,363	-6.4%
3	MVY	Martha's Vineyard	Nonhub	Massachusetts	7	9	2	1,283	862	-32.8%	18,233	17,049	-6.5%
36	AVP	Wilkes-Barre	Nonhub	Pennsylvania	7	7	0	550	461	-16.2%	24,576	22,942	-6.6%
109	LWS	Lewiston	Nonhub	Idaho	4	4	0	271	153	-43.5%	10,833	10,068	-7.1%
40	MFE	McAllen	Nonhub	Texas	6	5	-1	512	422	-17.6%	49,056	45,184	-7.9%
87	CLL	College Station	Nonhub	Texas	2	2	0	367	219	-40.3%	11,906	10,938	-8.1%
19	VPS	Fort Walton Beach	Nonhub	Florida	7	5	-2	757	587	-22.5%	46,441	42,205	-9.1%
99	YUM	Yuma	Nonhub	Arizona	4	1	-3	281	174	-38.1%	9,585	8,700	-9.2%
62	MLU	Monroe	Nonhub	Louisiana	4	3	-1	441	286	-35.1%	15,869	14,300	-9.9%
10	ILM	Wilmington, NC	Nonhub	North Carolina	5	5	0	713	637	-10.7%	47,045	42,362	-10.0%
30	EVV	Evansville	Nonhub	Indiana	6	5	-1	666	502	-24.6%	31,415	28,174	-10.3%
128	SPS	Wichita Falls	Nonhub	Texas	2	1	-1	211	122	-42.2%	6,594	5,890	-10.7%
94	SUN	Sun Valley	Nonhub	Idaho	3	5	2	403	190	-52.9%	14,942	13,322	-10.8%
49	SCE	State College	Nonhub	Pennsylvania	5	5	0	473	378	-20.1%	19,222	17,080	-11.1%
137	CSG	Columbus, GA	Nonhub	Georgia	1	1	0	119	102	-14.3%	5,740	5,100	-11.1%

Domestic

Summary by Hub Size 07-15

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
					Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
143	BPT	Beaumont	Nonhub	Texas	1	1	0	147	91	-38.1%	5,143	4,550	-11.5%
44	ASE	Aspen	Nonhub	Colorado	4	5	1	586	407	-30.5%	32,035	28,313	-11.6%
110	SJT	San Angelo	Nonhub	Texas	3	1	-2	214	150	-29.9%	8,520	7,500	-12.0%
52	PVC	Provincetown	Nonhub	Massachusetts	1	2	1	417	367	-12.0%	3,753	3,303	-12.0%
61	IDA	Idaho Falls	Nonhub	Idaho	6	7	1	397	292	-26.4%	23,168	20,368	-12.1%
89	ABI	Abilene	Nonhub	Texas	2	1	-1	298	210	-29.5%	11,434	9,954	-12.9%
14	SHV	Shreveport	Nonhub	Louisiana	8	6	-2	880	602	-31.6%	39,753	34,535	-13.1%
74	ITH	Ithaca	Nonhub	New York	3	3	0	304	255	-16.1%	11,882	10,241	-13.8%
169	RKS	Rock Springs	Nonhub	Wyoming	1	1	0	141	57	-59.6%	3,317	2,850	-14.1%
91	HLN	Helena	Nonhub	Montana	6	5	-1	292	199	-31.8%	14,290	12,179	-14.8%
56	LNK	Lincoln	Nonhub	Nebraska	5	4	-1	373	322	-13.7%	20,180	16,999	-15.8%
127	LAW	Lawton	Nonhub	Oklahoma	1	1	0	209	122	-41.6%	7,138	5,998	-16.0%
107	SGU	St George	Nonhub	Utah	2	2	0	310	155	-50.0%	9,300	7,750	-16.7%
153	ABY	Albany, GA	Nonhub	Georgia	1	1	0	120	80	-33.3%	4,800	4,000	-16.7%
189	BLV	Belleville	Nonhub	Illinois	2	2	0	19	14	-26.3%	2,850	2,335	-18.1%
22	MOB	Mobile	Nonhub	Alabama	6	5	-1	709	563	-20.6%	39,307	32,064	-18.4%
142	TXK	Texarkana	Nonhub	Arkansas	2	1	-1	151	91	-39.7%	5,630	4,550	-19.2%
144	TWF	Twin Falls	Nonhub	Idaho	1	1	0	182	88	-51.6%	5,460	4,400	-19.4%
60	AEX	Alexandria, LA	Nonhub	Louisiana	4	3	-1	471	295	-37.4%	18,452	14,750	-20.1%
76	EWN	New Bern	Nonhub	North Carolina	3	2	-1	312	243	-22.1%	15,146	12,085	-20.2%
156	SMX	Santa Maria	Nonhub	California	2	2	0	165	75	-54.5%	6,630	5,258	-20.7%
<b>8</b>	<b>ROA</b>	<b>Roanoke</b>	<b>Nonhub</b>	<b>Virginia</b>	<b>10</b>	<b>8</b>	<b>-2</b>	<b>977</b>	<b>656</b>	<b>-32.9%</b>	<b>46,605</b>	<b>36,272</b>	<b>-22.2%</b>
172	RFD	Chicago	Nonhub	Illinois	4	5	1	102	45	-55.9%	9,500	7,391	-22.2%
139	HDN	Hayden	Nonhub	Colorado	2	2	0	186	93	-50.0%	7,688	5,931	-22.9%
71	DLH	Duluth	Nonhub	Minnesota	5	2	-3	318	263	-17.3%	22,658	17,326	-23.5%
38	ATW	Appleton	Nonhub	Wisconsin	6	7	1	840	426	-49.3%	37,286	28,295	-24.1%
66	EWB	New Bedford	Nonhub	Massachusetts	2	2	0	368	279	-24.2%	3,312	2,511	-24.2%
145	DBQ	Dubuque	Nonhub	Iowa	1	1	0	124	88	-29.0%	5,828	4,400	-24.5%
157	PIH	Pocatello	Nonhub	Idaho	1	1	0	155	70	-54.8%	4,650	3,500	-24.7%
98	SBY	Salisbury	Nonhub	Maryland	2	2	0	248	179	-27.8%	9,917	7,429	-25.1%
7	SBA	Santa Barbara	Nonhub	California	10	6	-4	1,294	656	-49.3%	50,909	38,133	-25.1%
53	MGM	Montgomery	Nonhub	Alabama	4	3	-1	445	347	-22.0%	23,716	17,764	-25.1%
135	HVN	New Haven	Nonhub	Connecticut	1	1	0	147	110	-25.2%	5,439	4,070	-25.2%
50	TRI	Tri-Cities	Nonhub	Tennessee	7	4	-3	689	375	-45.6%	32,339	23,971	-25.9%
70	BFL	Bakersfield	Nonhub	California	6	4	-2	458	265	-42.1%	19,532	14,470	-25.9%
5	BTR	Baton Rouge	Nonhub	Louisiana	9	4	-5	1,057	730	-30.9%	55,628	40,942	-26.4%
51	GRK	Killeen	Nonhub	Texas	3	3	0	621	372	-40.1%	27,139	19,804	-27.0%
29	SBN	South Bend	Nonhub	Indiana	9	10	1	856	505	-41.0%	43,812	31,918	-27.1%
25	CRP	Corpus Christi	Nonhub	Texas	5	3	-2	832	522	-37.3%	54,989	39,782	-27.7%
17	TLH	Tallahassee	Nonhub	Florida	9	7	-2	1,074	590	-45.1%	54,097	39,035	-27.8%
46	MRY	Monterey	Nonhub	California	8	5	-3	811	392	-51.7%	31,720	22,846	-28.0%
24	CRW	Charleston, WV	Nonhub	West Virginia	11	8	-3	986	539	-45.3%	38,721	27,665	-28.6%
54	LAN	Lansing	Nonhub	Michigan	8	4	-4	475	347	-26.9%	31,999	22,760	-28.9%
69	CWA	Wausau	Nonhub	Wisconsin	4	3	-1	479	269	-43.8%	19,485	13,450	-31.0%
35	ABE	Allentown	Nonhub	Pennsylvania	11	9	-2	929	493	-46.9%	48,869	33,592	-31.3%
113	ACT	Waco	Nonhub	Texas	2	1	-1	348	148	-57.5%	10,888	7,400	-32.0%
23	GRB	Green Bay	Nonhub	Wisconsin	9	4	-5	881	540	-38.7%	54,541	37,062	-32.0%
9	MLI	Moline	Nonhub	Illinois	10	10	0	999	639	-36.0%	58,756	39,733	-32.4%
132	FLO	Florence, SC	Nonhub	South Carolina	2	1	-1	202	117	-42.1%	7,694	5,148	-33.1%
4	HYA	Hyannis	Nonhub	Massachusetts	4	5	1	1,480	854	-42.3%	16,325	10,856	-33.5%
148	YKM	Yakima	Nonhub	Washington	2	1	-1	248	87	-64.9%	9,982	6,612	-33.8%
116	FBS	Friday Harbor SPB	Nonhub	Washington	5	2	-3	216	141	-34.7%	1,296	846	-34.7%
93	CMI	Champaign	Nonhub	Illinois	4	2	-2	311	195	-37.3%	15,058	9,738	-35.3%
72	SBP	San Luis Obispo	Nonhub	California	4	3	-1	624	259	-58.5%	22,310	14,279	-36.0%

Domestic

Summary by Hub Size 07-15

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
					Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
65	MBS	Saginaw	Nonhub	Michigan	3	3	0	339	280	-17.4%	24,100	15,144	-37.2%
59	BMI	Bloomington	Nonhub	Illinois	5	7	2	530	295	-44.3%	33,106	20,112	-39.2%
63	AZO	Kalamazoo	Nonhub	Michigan	5	3	-2	571	284	-50.3%	28,469	16,374	-42.5%
138	EGE	Vail	Nonhub	Colorado	3	3	0	182	96	-47.3%	17,273	9,911	-42.6%
82	ERI	Erie	Nonhub	Pennsylvania	5	3	-2	446	233	-47.8%	18,656	10,506	-43.7%
150	IPT	Williamsport	Nonhub	Pennsylvania	1	1	0	145	86	-40.7%	5,729	3,182	-44.5%
121	OTH	North Bend	Nonhub	Oregon	1	3	2	151	140	-7.3%	5,587	3,080	-44.9%
101	FSM	Fort Smith	Nonhub	Arkansas	3	2	-1	336	170	-49.4%	15,178	8,362	-44.9%
77	BGM	Binghamton	Nonhub	New York	5	3	-2	436	242	-44.5%	18,375	10,020	-45.5%
95	LSE	La Crosse	Nonhub	Wisconsin	2	2	0	315	188	-40.3%	17,739	9,370	-47.2%
79	RST	Rochester, MN	Nonhub	Minnesota	4	3	-1	445	235	-47.2%	25,073	13,092	-47.8%
47	GPT	Gulfport/Biloxi	Nonhub	Mississippi	8	5	-3	758	385	-49.2%	51,692	26,684	-48.4%
64	HRL	Harlingen	Nonhub	Texas	6	3	-3	516	283	-45.2%	54,905	27,210	-50.4%
136	BID	Block Island	Nonhub	Rhode Island	1	1	0	221	108	-51.1%	1,989	972	-51.1%
122	PIR	Pierre	Nonhub	South Dakota	3	3	0	167	124	-25.7%	4,103	1,767	-56.9%
124	RIW	Riverton	Nonhub	Wyoming	1	2	1	89	124	39.3%	2,670	1,116	-58.2%
125	ACV	Arcata/Eureka	Nonhub	California	5	1	-4	453	123	-72.8%	17,868	6,750	-62.2%
134	TOL	Toledo	Nonhub	Ohio	7	4	-3	552	112	-79.7%	21,982	7,881	-64.1%
105	HHH	Hilton Head Island	Nonhub	South Carolina	2	1	-1	371	158	-57.4%	17,323	5,846	-66.3%
192	PSM	Portsmouth, NH	Nonhub	New Hampshire	2	1	-1	36	5	-86.1%	2,465	830	-66.3%
97	BFI	Seattle	Nonhub	Washington	3	2	-1	452	184	-59.3%	4,972	1,656	-66.7%
155	GLH	Greenville (US) MS	Nonhub	Mississippi	1	1	0	62	78	25.8%	2,108	702	-66.7%
151	MQT	Marquette	Nonhub	Michigan	7	2	-5	387	85	-78.0%	13,274	4,250	-68.0%
43	PHF	Newport News	Nonhub	Virginia	8	3	-5	867	410	-52.7%	72,454	22,066	-69.5%
183	EKO	Elko	Nonhub	Nevada	1	1	0	170	30	-82.4%	5,100	1,500	-70.6%
75	SWF	Newburgh	Nonhub	New York	7	5	-2	639	253	-60.4%	54,215	15,516	-71.4%
161	CLD	San Diego	Nonhub	California	2	1	-1	236	62	-73.7%	7,297	1,984	-72.8%
186	GCN	Grand Canyon	Nonhub	Arizona	1	1	0	75	21	-72.0%	750	189	-74.8%
182	BLD	Las Vegas	Nonhub	Nevada	1	1	0	75	31	-58.7%	750	186	-75.2%
162	RDD	Redding	Nonhub	California	4	1	-3	279	62	-77.8%	14,074	3,100	-78.0%
191	STC	St Cloud	Nonhub	Minnesota	1	1	0	147	7	-95.2%	4,998	1,092	-78.2%
152	CYS	Cheyenne	Nonhub	Wyoming	1	1	0	226	83	-63.3%	4,635	747	-83.9%
129	FMN	Farmington	Nonhub	New Mexico	7	3	-4	351	119	-66.1%	6,669	1,071	-83.9%
188	APF	Naples (US)	Nonhub	Florida	2	1	-1	123	17	-86.2%	3,006	170	-94.3%
193	IFP	Bullhead City	Nonhub	Arizona	15	-	-15	27	-	-100.0%	4,218	-	-100.0%
194	CIC	Chico	Nonhub	California	1	-	-1	116	-	-100.0%	3,480	-	-100.0%
195	IYK	Inyokern	Nonhub	California	1	-	-1	85	-	-100.0%	2,550	-	-100.0%
196	MOD	Modesto	Nonhub	California	2	-	-2	263	-	-100.0%	7,890	-	-100.0%
197	OXR	Oxnard/Ventura	Nonhub	California	1	-	-1	116	-	-100.0%	3,480	-	-100.0%
198	PMD	Palmdale	Nonhub	California	1	-	-1	58	-	-100.0%	2,900	-	-100.0%
199	FNL	Fort Collins/Loveland	Nonhub	Colorado	1	-	-1	18	-	-100.0%	2,700	-	-100.0%
200	TEX	Telluride	Nonhub	Colorado	1	-	-1	124	-	-100.0%	2,356	-	-100.0%
201	BDR	Bridgeport	Nonhub	Connecticut	1	-	-1	23	-	-100.0%	184	-	-100.0%
202	ILG	Wilmington, DE	Nonhub	Delaware	1	-	-1	54	-	-100.0%	2,700	-	-100.0%
203	MTH	Marathon, FL	Nonhub	Florida	1	-	-1	26	-	-100.0%	1,300	-	-100.0%
204	PFN	Panama City, FL	Nonhub	Florida	4	-	-4	368	-	-100.0%	21,384	-	-100.0%
205	AHN	Athens (US)	Nonhub	Georgia	1	-	-1	58	-	-100.0%	1,102	-	-100.0%
206	MYL	McCall, ID	Nonhub	Idaho	2	-	-2	74	-	-100.0%	592	-	-100.0%
207	SMN	Salmon, ID	Nonhub	Idaho	2	-	-2	74	-	-100.0%	592	-	-100.0%
208	PWK	Chicago	Nonhub	Illinois	2	-	-2	18	-	-100.0%	180	-	-100.0%
209	FOE	Topeka	Nonhub	Kansas	1	-	-1	3	-	-100.0%	450	-	-100.0%
210	BED	Bedford/Hanscom	Nonhub	Massachusetts	3	-	-3	175	-	-100.0%	3,325	-	-100.0%
211	CEF	Springfield, MA	Nonhub	Massachusetts	1	-	-1	7	-	-100.0%	1,092	-	-100.0%
212	LWT	Lewistown, MT	Nonhub	Montana	2	-	-2	108	-	-100.0%	2,052	-	-100.0%

Domestic

Summary by Hub Size 07-15

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
					Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
213	MLS	Miles City, MT	Nonhub	Montana	2	-	-2	108	-	-100.0%	2,052	-	-100.0%
214	ELY	Ely, NV	Nonhub	Nevada	1	-	-1	27	-	-100.0%	513	-	-100.0%
215	ALM	Alamogordo, NM	Nonhub	New Mexico	2	-	-2	54	-	-100.0%	1,026	-	-100.0%
216	GUP	Gallup, NM	Nonhub	New Mexico	3	-	-3	77	-	-100.0%	1,463	-	-100.0%
217	HTO	East Hampton	Nonhub	New York	1	-	-1	4	-	-100.0%	32	-	-100.0%
218	JRB	New York, NY	Nonhub	New York	3	-	-3	416	-	-100.0%	3,328	-	-100.0%
219	TSS	East 34th Street Heliport, NY	Nonhub	New York	3	-	-3	209	-	-100.0%	1,672	-	-100.0%
220	ISO	Kinston	Nonhub	North Carolina	1	-	-1	3	-	-100.0%	450	-	-100.0%
221	SOP	Southern Pines	Nonhub	North Carolina	1	-	-1	30	-	-100.0%	1,200	-	-100.0%
222	LMT	Klamath Falls	Nonhub	Oregon	1	-	-1	89	-	-100.0%	3,293	-	-100.0%
223	SLE	Salem, OR	Nonhub	Oregon	1	-	-1	62	-	-100.0%	3,100	-	-100.0%
224	WST	Westerly	Nonhub	Rhode Island	1	-	-1	226	-	-100.0%	2,034	-	-100.0%
225	BKX	Brookings, SD	Nonhub	South Dakota	1	-	-1	50	-	-100.0%	950	-	-100.0%
226	DRT	Del Rio, TX	Nonhub	Texas	1	-	-1	85	-	-100.0%	2,890	-	-100.0%
227	CLM	Port Angeles	Nonhub	Washington	1	-	-1	236	-	-100.0%	2,596	-	-100.0%
228	ODW	Oak Harbor, WA	Nonhub	Washington	2	-	-2	209	-	-100.0%	2,299	-	-100.0%
229	BLF	Bluefield, WV	Nonhub	West Virginia	2	-	-2	112	-	-100.0%	2,128	-	-100.0%
230	ARV	Minocqua, WI	Nonhub	Wisconsin	1	-	-1	8	-	-100.0%	80	-	-100.0%
231	EGV	Eagle River, WI	Nonhub	Wisconsin	1	-	-1	10	-	-100.0%	100	-	-100.0%
232	SHR	Sheridan	Nonhub	Wyoming	2	-	-2	217	-	-100.0%	4,893	-	-100.0%
<b>Average/Total</b>					<b>723</b>	<b>705</b>	<b>-18</b>	<b>71,903</b>	<b>49,573</b>	<b>-31.1%</b>	<b>3,172,927</b>	<b>2,776,442</b>	<b>-12.5%</b>

Domestic

Summary by Hub Size 07-15

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats			
					Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.	
31	OWB	Owensboro	EAS	Kentucky	-	2	2	-	92	-	-	-	2,712	-
60	TBN	Fort Leonard Wood	EAS	Missouri	-	1	1	-	128	-	-	-	1,152	-
75	CGI	Cape Girardeau	EAS	Missouri	-	1	1	-	104	-	-	-	936	-
78	BRL	Burlington (US) IA	EAS	Iowa	-	2	2	-	109	-	-	-	872	-
94	MKL	Jackson (US) TN	EAS	Tennessee	-	1	1	-	78	-	-	-	624	-
103	CNM	Carlsbad	EAS	New Mexico	-	2	2	-	52	-	-	-	468	-
1	PBG	Plattsburgh	EAS	New York	2	5	3	81	131	61.7%	1,539	14,974	873.0%	
13	HGR	Hagerstown	EAS	Maryland	1	3	2	54	118	118.5%	1,026	3,408	232.2%	
2	GRI	Grand Island	EAS	Nebraska	3	3	0	135	75	-44.4%	2,565	5,768	124.9%	
11	JMS	Jamestown (US) ND	EAS	North Dakota	2	2	0	54	74	37.0%	1,836	3,700	101.5%	
30	BFF	Scottsbluff	EAS	Nebraska	1	2	1	89	93	4.5%	1,691	2,790	65.0%	
<b>35</b>	<b>SHD</b>	<b>Staunton</b>	EAS	<b>Virginia</b>	1	1	0	85	78	-8.2%	1,615	2,652	64.2%	
39	ESC	Escanaba	EAS	Michigan	2	1	-1	85	52	-38.8%	1,615	2,600	61.0%	
8	MEI	Meridian	EAS	Mississippi	1	2	1	61	83	36.1%	2,740	4,150	51.5%	
20	JLN	Joplin	EAS	Missouri	1	1	0	108	62	-42.6%	2,052	3,100	51.1%	
7	CKB	Clarksburg	EAS	West Virginia	2	5	3	85	88	3.5%	2,890	4,312	49.2%	
16	CIU	Sault Ste Marie (US)	EAS	Michigan	2	1	-1	62	62	0.0%	2,108	3,100	47.1%	
51	MBL	Manistee	EAS	Michigan	2	2	0	58	51	-12.1%	1,102	1,530	38.8%	
53	MWA	Marion	EAS	Illinois	1	1	0	54	156	188.9%	1,026	1,404	36.8%	
34	DUJ	Dubois	EAS	Pennsylvania	2	2	0	104	78	-25.0%	1,976	2,652	34.2%	
43	DVL	Devils Lake	EAS	North Dakota	2	2	0	54	48	-11.1%	1,836	2,400	30.7%	
28	IMT	Iron Mountain	EAS	Michigan	2	2	0	116	57	-50.9%	2,204	2,850	29.3%	
33	WYS	West Yellowstone	EAS	Montana	1	1	0	70	54	-22.9%	2,100	2,700	28.6%	
40	PIB	Laurel	EAS	Mississippi	1	2	1	62	52	-16.1%	2,108	2,600	23.3%	
37	HYS	Hays	EAS	Kansas	3	1	-2	112	52	-53.6%	2,128	2,600	22.2%	
14	GCK	Garden City	EAS	Kansas	3	1	-2	139	62	-55.4%	2,641	3,100	17.4%	
47	LBF	North Platte	EAS	Nebraska	1	1	0	89	62	-30.3%	1,691	1,860	10.0%	
9	HIB	Hibbing/Chisholm	EAS	Minnesota	3	2	-1	117	82	-29.9%	3,978	4,100	3.1%	
49	LEB	Lebanon	EAS	New Hampshire	1	2	1	89	186	109.0%	1,691	1,674	-1.0%	
41	CDC	Cedar City	EAS	Utah	4	1	-3	139	52	-62.6%	2,641	2,600	-1.6%	
42	LAR	Laramie	EAS	Wyoming	2	1	-1	139	52	-62.6%	2,641	2,600	-1.6%	
15	PAH	Paducah	EAS	Kentucky	1	1	0	93	62	-33.3%	3,162	3,100	-2.0%	
10	JST	Johnstown	EAS	Pennsylvania	1	2	1	112	109	-2.7%	3,808	3,706	-2.7%	
50	BKW	Beckley	EAS	West Virginia	2	1	-1	85	52	-38.8%	1,615	1,560	-3.4%	
29	PQI	Presque Isle	EAS	Maine	1	1	0	89	83	-6.7%	3,026	2,822	-6.7%	
52	UIN	Quincy	EAS	Illinois	2	1	-1	81	159	96.3%	1,539	1,431	-7.0%	
36	PKB	Parkersburg/Marietta	EAS	West Virginia	1	2	1	85	78	-8.2%	2,890	2,652	-8.2%	
76	SVC	Silver City	EAS	New Mexico	1	1	0	54	104	92.6%	1,026	936	-8.8%	
5	COD	Cody	EAS	Wyoming	2	3	1	155	97	-37.4%	5,487	4,930	-10.2%	
12	MGW	Morgantown	EAS	West Virginia	2	3	1	116	104	-10.3%	3,944	3,536	-10.3%	

Domestic

Summary by Hub Size 07-15

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
					Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
22	ART	Watertown (US) NY	EAS	New York	4	1	-3	189	62	-67.2%	3,591	3,100	-13.7%
4	PLN	Pellston	EAS	Michigan	2	2	0	125	103	-17.6%	5,850	4,976	-14.9%
17	CMX	Hancock	EAS	Michigan	1	1	0	93	62	-33.3%	3,658	3,100	-15.3%
55	LNS	Lancaster	EAS	Pennsylvania	1	2	1	81	130	60.5%	1,539	1,300	-15.5%
38	APN	Alpena	EAS	Michigan	2	1	-1	93	52	-44.1%	3,162	2,600	-17.8%
85	RUT	Rutland	EAS	Vermont	1	1	0	54	93	72.2%	1,026	837	-18.4%
3	PGV	Greenville	EAS	North Carolina	1	1	0	151	114	-24.5%	7,069	5,700	-19.4%
56	LBL	Liberal	EAS	Kansas	2	1	-1	85	83	-2.4%	1,615	1,293	-19.9%
44	BHB	Bar Harbor	EAS	Maine	2	1	-1	167	93	-44.3%	3,173	2,387	-24.8%
46	EAR	Kearney	EAS	Nebraska	1	1	0	85	62	-27.1%	2,550	1,860	-27.1%
32	INL	International Falls	EAS	Minnesota	2	2	0	90	54	-40.0%	3,844	2,700	-29.8%
89	CVN	Clovis	EAS	New Mexico	1	1	0	54	80	48.1%	1,026	720	-29.8%
91	SLN	Salina	EAS	Kansas	1	1	0	54	78	44.4%	1,026	702	-31.6%
54	SDY	Sidney	EAS	Montana	2	1	-1	108	155	43.5%	2,052	1,395	-32.0%
19	BJI	Bemidji	EAS	Minnesota	2	1	-1	136	62	-54.4%	4,575	3,100	-32.2%
70	ALS	Alamosa	EAS	Colorado	1	2	1	81	109	34.6%	1,539	981	-36.3%
26	ALO	Waterloo	EAS	Iowa	1	1	0	119	57	-52.1%	4,526	2,850	-37.0%
57	DEC	Decatur	EAS	Illinois	2	2	0	108	156	44.4%	2,052	1,248	-39.2%
92	JBR	Jonesboro	EAS	Arkansas	1	1	0	54	78	44.4%	1,026	624	-39.2%
77	HRO	Harrison	EAS	Arkansas	2	2	0	79	99	25.3%	1,501	891	-40.6%
6	RHI	Rhineland	EAS	Wisconsin	4	2	-2	270	88	-67.4%	7,455	4,400	-41.0%
61	AOO	Altoona	EAS	Pennsylvania	1	1	0	81	114	40.7%	1,944	1,140	-41.4%
18	MKG	Muskegon	EAS	Michigan	3	1	-2	205	62	-69.8%	5,290	3,100	-41.4%
24	EAU	Eau Claire	EAS	Wisconsin	3	1	-2	152	62	-59.2%	5,296	3,100	-41.5%
48	RKD	Rockland	EAS	Maine	2	1	-1	151	186	23.2%	2,869	1,674	-41.7%
86	FKL	Franklin	EAS	Pennsylvania	2	1	-1	77	83	7.8%	1,463	830	-43.3%
62	AUG	Augusta (US) ME	EAS	Maine	2	1	-1	108	124	14.8%	2,052	1,116	-45.6%
64	HON	Huron	EAS	South Dakota	2	2	0	108	124	14.8%	2,052	1,116	-45.6%
81	MSS	Massena	EAS	New York	2	1	-1	81	93	14.8%	1,539	837	-45.6%
97	GGW	Glasgow (US)	EAS	Montana	1	1	0	54	62	14.8%	1,026	558	-45.6%
99	WRL	Worland	EAS	Wyoming	1	1	0	54	62	14.8%	1,026	558	-45.6%
93	IWD	Ironwood	EAS	Michigan	2	1	-1	62	78	25.8%	1,178	624	-47.0%
45	LWB	Lewisburg	EAS	West Virginia	4	2	-2	120	62	-48.3%	4,202	2,108	-49.8%
25	BRD	Brainerd	EAS	Minnesota	3	1	-2	178	60	-66.3%	6,052	3,000	-50.4%
23	ABR	Aberdeen (US)	EAS	South Dakota	3	1	-2	209	62	-70.3%	6,296	3,100	-50.8%
27	SUX	Sioux City	EAS	Iowa	1	1	0	154	57	-63.0%	6,212	2,850	-54.1%
72	ELD	El Dorado	EAS	Arkansas	2	2	0	108	104	-3.7%	2,052	936	-54.4%
74	VIS	Visalia	EAS	California	2	2	0	108	104	-3.7%	2,052	936	-54.4%
67	PGA	Page	EAS	Arizona	2	3	1	120	114	-5.0%	2,280	1,026	-55.0%
80	IRK	Kirksville	EAS	Missouri	2	1	-1	108	93	-13.9%	2,052	837	-59.2%
83	SLK	Saranac Lake	EAS	New York	2	1	-1	108	93	-13.9%	2,052	837	-59.2%
82	OGS	Ogdensburg	EAS	New York	2	1	-1	112	93	-17.0%	2,128	837	-60.7%
58	DDC	Dodge City	EAS	Kansas	4	2	-2	170	83	-51.2%	3,230	1,188	-63.2%
68	FOD	Fort Dodge	EAS	Iowa	1	2	1	81	125	54.3%	2,754	1,000	-63.7%
21	BTM	Butte	EAS	Montana	2	1	-1	141	62	-56.0%	8,662	3,100	-64.2%
88	VCT	Victoria (US)	EAS	Texas	1	1	0	62	39	-37.1%	2,108	741	-64.8%

Domestic

Summary by Hub Size 07-15

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
					Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
96	GDV	Glendive	EAS	Montana	2	1	-1	85	62	-27.1%	1,615	558	-65.4%
98	OLF	Wolf Point	EAS	Montana	2	1	-1	85	62	-27.1%	1,615	558	-65.4%
101	CEZ	Cortez	EAS	Colorado	1	1	0	81	57	-29.6%	1,539	513	-66.7%
90	HOT	Hot Springs	EAS	Arkansas	2	2	0	112	78	-30.4%	2,128	702	-67.0%
71	MSL	Muscle Shoals	EAS	Alabama	2	1	-1	85	104	22.4%	2,890	936	-67.6%
95	TVF	Thief River Falls	EAS	Minnesota	2	1	-1	54	62	14.8%	1,836	558	-69.6%
73	IPL	Imperial	EAS	California	2	2	0	108	104	-3.7%	3,240	936	-71.1%
79	PDT	Pendleton	EAS	Oregon	2	1	-1	85	94	10.6%	3,145	846	-73.1%
65	JHW	Jamestown (US) NY	EAS	New York	2	1	-1	116	104	-10.3%	3,944	1,040	-73.6%
66	BFD	Bradford	EAS	Pennsylvania	2	1	-1	116	104	-10.3%	3,944	1,040	-73.6%
87	PRC	Prescott	EAS	Arizona	2	1	-1	162	88	-45.7%	3,078	792	-74.3%
104	GBD	Great Bend	EAS	Kansas	2	1	-1	54	25	-53.7%	1,026	225	-78.1%
105	HVR	Havre	EAS	Montana	1	1	0	54	25	-53.7%	1,026	225	-78.1%
102	SOW	Show Low	EAS	Arizona	2	1	-1	120	52	-56.7%	2,280	468	-79.5%
84	ATY	Watertown (US) SD	EAS	South Dakota	2	1	-1	124	93	-25.0%	4,216	837	-80.1%
100	MCE	Merced	EAS	California	2	1	-1	139	57	-59.0%	2,641	513	-80.6%
106	MCK	Mccook	EAS	Nebraska	1	1	0	54	21	-61.1%	1,026	189	-81.6%
69	MCW	Mason City	EAS	Iowa	2	2	0	162	125	-22.8%	5,508	1,000	-81.8%
59	TUP	Tupelo	EAS	Mississippi	3	2	-1	202	130	-35.6%	7,150	1,170	-83.6%
107	IGM	Kingman	EAS	Arizona	1	-	-1	81	-	-100.0%	1,539	-	-100.0%
108	CEC	Crescent City	EAS	California	2	-	-2	93	-	-100.0%	2,790	-	-100.0%
109	PUB	Pueblo	EAS	Colorado	1	-	-1	54	-	-100.0%	1,026	-	-100.0%
110	MCN	Macon	EAS	Georgia	1	-	-1	93	-	-100.0%	4,892	-	-100.0%
111	AIA	Alliance	EAS	Nebraska	2	-	-2	85	-	-100.0%	1,615	-	-100.0%
112	CDR	Chadron	EAS	Nebraska	1	-	-1	54	-	-100.0%	1,026	-	-100.0%
113	CNY	Moab	EAS	Utah	2	-	-2	73	-	-100.0%	1,387	-	-100.0%
114	VEL	Vernal	EAS	Utah	1	-	-1	54	-	-100.0%	1,026	-	-100.0%
<b>Average/Total</b>					<b>194</b>	<b>155</b>	<b>-39</b>	<b>10,884</b>	<b>8,889</b>	<b>-18.3%</b>	<b>288,807</b>	<b>213,680</b>	<b>-26.0%</b>



# **VIRGINIA COMMERCIAL AIR SERVICE STRATEGIC REVIEW**

## **Summary by Hub Size 14\_15**

**Domestic**

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
					Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
6	SEA	Seattle	Large	Washington	80	83	3	14,246	16,218	13.8%	1,955,390	2,173,917	11.2%
26	FLL	Fort Lauderdale	Large	Florida	60	66	6	6,115	6,732	10.1%	879,387	968,973	10.2%
<b>21</b>	<b>DCA</b>	<b>Washington National</b>	<b>Large</b>	<b>Virginia</b>	<b>82</b>	<b>82</b>	<b>0</b>	<b>11,449</b>	<b>12,335</b>	<b>7.7%</b>	<b>1,109,419</b>	<b>1,238,612</b>	<b>11.6%</b>
25	MIA	Miami	Large	Florida	51	56	5	6,866	7,321	6.6%	917,924	1,043,967	13.7%
28	TPA	Tampa	Large	Florida	63	64	1	5,673	6,009	5.9%	766,953	825,638	7.7%
15	MCO	Orlando	Large	Florida	76	76	0	9,802	10,260	4.7%	1,453,380	1,547,786	6.5%
1	ATL	Atlanta	Large	Georgia	167	158	-9	33,183	34,527	4.1%	4,310,851	4,554,111	5.6%
14	BOS	Boston	Large	Massachusetts	71	74	3	14,012	14,579	4.0%	1,484,316	1,576,015	6.2%
20	BWI	Baltimore	Large	Maryland	66	67	1	8,790	8,975	2.1%	1,207,064	1,261,511	4.5%
8	LAS	Las Vegas	Large	Nevada	113	113	0	13,305	13,562	1.9%	1,987,662	2,095,890	5.4%
10	PHX	Phoenix	Large	Arizona	78	78	0	15,067	15,342	1.8%	1,995,157	2,075,195	4.0%
19	EWR	New York Newark	Large	New Jersey	84	83	-1	12,903	13,052	1.2%	1,297,798	1,362,644	5.0%
24	SAN	San Diego	Large	California	47	50	3	7,303	7,364	0.8%	1,011,384	1,055,091	4.3%
3	DFW	Dallas/Fort Worth	Large	Texas	145	147	2	25,923	26,130	0.8%	2,933,118	2,988,866	1.9%
7	CLT	Charlotte	Large	North Carolina	114	123	9	20,754	20,919	0.8%	2,078,481	2,098,422	1.0%
17	JFK	New York Kennedy	Large	New York	64	63	-1	11,450	11,521	0.6%	1,400,791	1,468,286	4.8%
16	LGA	New York LaGuardia	Large	New York	71	68	-3	14,794	14,881	0.6%	1,492,166	1,538,202	3.1%
27	PDX	Portland, OR	Large	Oregon	57	57	0	7,629	7,653	0.3%	879,002	938,915	6.8%
4	LAX	Los Angeles	Large	California	102	99	-3	21,565	21,621	0.3%	2,773,950	2,954,869	6.5%
11	MSP	Minneapolis/St. Paul	Large	Minnesota	119	120	1	15,872	15,899	0.2%	1,764,594	1,842,497	4.4%
22	MDW	Chicago Midway	Large	Illinois	72	71	-1	8,201	8,202	0.0%	1,171,792	1,183,296	1.0%
18	PHL	Philadelphia	Large	Pennsylvania	92	95	3	15,601	15,362	-1.5%	1,424,487	1,451,466	1.9%
9	SFO	San Francisco	Large	California	72	71	-1	15,449	15,090	-2.3%	1,973,081	2,075,834	5.2%
2	ORD	Chicago O'Hare	Large	Illinois	160	161	1	35,189	34,229	-2.7%	3,142,931	3,347,666	6.5%
13	DTW	Detroit	Large	Michigan	117	109	-8	15,708	15,249	-2.9%	1,513,926	1,602,854	5.9%
12	IAH	Houston Bush	Large	Texas	114	116	2	16,632	16,052	-3.5%	1,556,172	1,611,234	3.5%
29	HNL	Honolulu	Large	Hawaii	34	30	-4	5,667	5,452	-3.8%	776,865	782,008	0.7%
23	SLC	Salt Lake City	Large	Utah	85	83	-2	10,471	9,879	-5.7%	1,093,833	1,112,060	1.7%
5	DEN	Denver	Large	Colorado	157	145	-12	23,676	22,307	-5.8%	2,682,140	2,625,442	-2.1%
<b>30</b>	<b>IAD</b>	<b>Washington Dulles</b>	<b>Large</b>	<b>Virginia</b>	<b>80</b>	<b>80</b>	<b>0</b>	<b>8,779</b>	<b>8,234</b>	<b>-6.2%</b>	<b>754,953</b>	<b>774,565</b>	<b>2.6%</b>
<b>Average/Total</b>					<b>2,693</b>	<b>2,688</b>	<b>-5</b>	<b>432,074</b>	<b>434,956</b>	<b>0.7%</b>	<b>49,788,967</b>	<b>52,175,832</b>	<b>4.8%</b>

## Domestic

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
					Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
1	DAL	Dallas Love	Medium	Texas	19	52	33	3,764	5,855	55.6%	483,064	812,448	68.2%
14	CLE	Cleveland	Medium	Ohio	41	35	-6	4,221	4,262	1.0%	371,021	445,768	20.1%
15	IND	Indianapolis	Medium	Indiana	32	37	5	3,986	4,217	5.8%	378,245	434,705	14.9%
5	AUS	Austin	Medium	Texas	38	44	6	4,427	4,884	10.3%	554,929	633,003	14.1%
22	CVG	Cincinnati	Medium	Ohio	48	48	0	4,224	4,161	-1.5%	306,513	345,657	12.8%
12	SNA	Orange County	Medium	California	17	20	3	3,372	3,614	7.2%	465,962	511,180	9.7%
28	PBI	West Palm Beach	Medium	Florida	19	18	-1	1,617	1,759	8.8%	218,961	239,650	9.4%
18	ANC	Anchorage	Medium	Alaska	41	40	-1	4,178	4,148	-0.7%	349,430	382,406	9.4%
17	CMH	Columbus, OH	Medium	Ohio	28	30	2	3,938	4,074	3.5%	352,564	384,427	9.0%
4	BNA	Nashville	Medium	Tennessee	45	48	3	5,498	5,733	4.3%	596,651	638,630	7.0%
10	MSY	New Orleans	Medium	Louisiana	37	38	1	4,044	4,117	1.8%	494,451	525,673	6.3%
20	OGG	Kahului	Medium	Hawaii	21	21	0	3,473	3,293	-5.2%	335,220	355,972	6.2%
13	PIT	Pittsburgh	Medium	Pennsylvania	33	44	11	4,301	4,822	12.1%	428,254	452,699	5.7%
6	OAK	Oakland	Medium	California	35	41	6	4,214	4,390	4.2%	603,077	627,362	4.0%
8	RDU	Raleigh/Durham	Medium	North Carolina	37	40	3	5,128	5,188	1.2%	524,541	543,822	3.7%
9	SJC	San Jose	Medium	California	26	27	1	3,954	4,037	2.1%	521,793	537,968	3.1%
11	SMF	Sacramento	Medium	California	27	29	2	3,865	3,990	3.2%	498,208	513,396	3.0%
24	JAX	Jacksonville, FL	Medium	Florida	25	26	1	2,676	2,666	-0.4%	273,937	278,867	1.8%
16	SAT	San Antonio	Medium	Texas	28	30	2	3,507	3,452	-1.6%	420,773	424,964	1.0%
27	RSW	Fort Myers	Medium	Florida	30	30	0	1,810	1,786	-1.3%	245,699	247,338	0.7%
21	MKE	Milwaukee	Medium	Wisconsin	29	31	2	3,348	3,240	-3.2%	347,553	345,771	-0.5%
29	BUR	Burbank	Medium	California	12	14	2	2,020	2,105	4.2%	237,221	235,854	-0.6%
2	STL	St. Louis	Medium	Missouri	57	58	1	7,004	7,017	0.2%	709,853	701,042	-1.2%
3	HOU	Houston Hobby	Medium	Texas	50	50	0	5,020	5,012	-0.2%	681,907	673,188	-1.3%
7	MCI	Kansas City	Medium	Missouri	41	42	1	5,091	4,735	-7.0%	578,345	569,313	-1.6%
31	ONT	Ontario	Medium	California	13	13	0	1,775	1,783	0.5%	217,915	214,172	-1.7%
30	OMA	Omaha	Medium	Nebraska	19	22	3	2,098	2,045	-2.5%	219,567	214,275	-2.4%
26	BUF	Buffalo	Medium	New York	19	19	0	2,779	2,629	-5.4%	270,677	261,524	-3.4%
32	OKC	Oklahoma City	Medium	Oklahoma	21	22	1	2,228	2,116	-5.0%	222,139	211,926	-4.6%
25	ABQ	Albuquerque	Medium	New Mexico	24	25	1	2,568	2,381	-7.3%	288,387	272,685	-5.4%
23	BDL	Hartford	Medium	Connecticut	25	25	0	2,801	2,606	-7.0%	303,060	284,921	-6.0%
<b>Average/Total</b>					<b>937</b>	<b>1,019</b>	<b>-209</b>	<b>112,929</b>	<b>116,117</b>	<b>2.8%</b>	<b>12,499,917</b>	<b>13,320,606</b>	<b>6.6%</b>

**Domestic**

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
					Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
64	PIE	Tampa	Small	Florida	32	42	10	293	449	53.2%	49,961	76,679	53.5%
57	SFB	Orlando Sanford	Small	Florida	51	56	5	397	597	50.4%	68,047	101,522	49.2%
51	SGF	Springfield, MO	Small	Missouri	10	10	0	692	727	5.1%	41,053	49,647	20.9%
58	ECP	Panama City, FL	Small	Florida	8	11	3	404	557	37.9%	49,244	56,541	14.8%
56	ITO	Hilo	Small	Hawaii	3	3	0	553	619	11.9%	65,673	74,207	13.0%
17	GRR	Grand Rapids	Small	Michigan	19	21	2	1,431	1,533	7.1%	121,311	135,394	11.6%
11	KOA	Kona	Small	Hawaii	10	11	1	1,696	1,638	-3.4%	158,068	175,657	11.1%
32	MYR	Myrtle Beach	Small	South Carolina	25	31	6	1,064	1,113	4.6%	125,666	138,287	10.0%
1	MEM	Memphis	Small	Tennessee	32	38	6	2,403	2,608	8.5%	191,082	209,697	9.7%
6	CHS	Charleston, SC	Small	South Carolina	19	22	3	2,002	2,086	4.2%	170,640	184,456	8.1%
48	JAN	Jackson, MS	Small	Mississippi	6	6	0	794	836	5.3%	53,167	57,241	7.7%
25	GSP	Greenville, SC	Small	South Carolina	18	18	0	1,314	1,361	3.6%	95,369	102,500	7.5%
23	PWM	Portland, ME	Small	Maine	12	12	0	1,307	1,367	4.6%	108,145	114,875	6.2%
7	BOI	Boise	Small	Idaho	18	18	0	1,677	1,853	10.5%	162,769	172,568	6.0%
66	ACY	Atlantic City	Small	New Jersey	10	11	1	403	396	-1.7%	57,660	60,996	5.8%
49	MAF	Midland/Odessa	Small	Texas	6	6	0	855	823	-3.7%	69,157	73,150	5.8%
9	RNO	Reno	Small	Nevada	15	16	1	1,775	1,702	-4.1%	188,749	199,469	5.7%
67	AZA	Phoenix Mesa	Small	Arizona	33	34	1	308	330	7.1%	50,176	52,780	5.2%
<b>5</b>	<b>ORF</b>	<b>Norfolk</b>	<b>Small</b>	<b>Virginia</b>	<b>18</b>	<b>18</b>	<b>0</b>	<b>2,003</b>	<b>2,087</b>	<b>4.2%</b>	<b>164,060</b>	<b>171,084</b>	<b>4.3%</b>
33	MSN	Madison	Small	Wisconsin	12	10	-2	1,288	1,103	-14.4%	92,694	96,437	4.0%
4	JNU	Juneau	Small	Alaska	14	14	0	2,235	2,112	-5.5%	84,877	88,073	3.8%
<b>2</b>	<b>RIC</b>	<b>Richmond</b>	<b>Small</b>	<b>Virginia</b>	<b>17</b>	<b>18</b>	<b>1</b>	<b>2,350</b>	<b>2,306</b>	<b>-1.9%</b>	<b>185,545</b>	<b>192,025</b>	<b>3.5%</b>
53	FAR	Fargo	Small	North Dakota	10	10	0	633	650	2.7%	43,464	44,722	2.9%
13	ALB	Albany, NY	Small	New York	18	19	1	1,635	1,620	-0.9%	132,114	135,724	2.7%
42	CAK	Akron	Small	Ohio	11	14	3	933	932	-0.1%	86,948	89,306	2.7%
39	PNS	Pensacola	Small	Florida	11	13	2	924	987	6.8%	85,180	86,981	2.1%
27	SAV	Savannah	Small	Georgia	13	17	4	1,289	1,299	0.8%	105,692	107,791	2.0%
22	GSO	Greensboro	Small	North Carolina	14	14	0	1,384	1,391	0.5%	98,707	100,458	1.8%
3	SDF	Louisville	Small	Kentucky	21	20	-1	2,164	2,178	0.6%	183,814	186,960	1.7%
37	LEX	Lexington	Small	Kentucky	15	15	0	1,073	1,052	-2.0%	67,919	68,476	0.8%
61	ISP	Long Island Islip	Small	New York	6	6	0	486	493	1.4%	59,058	59,407	0.6%
63	FNT	Flint	Small	Michigan	7	7	0	467	466	-0.2%	43,108	43,265	0.4%
41	CID	Cedar Rapids	Small	Iowa	12	12	0	957	945	-1.3%	58,562	58,700	0.2%
35	ICT	Wichita	Small	Kansas	12	11	-1	1,083	1,065	-1.7%	90,978	91,098	0.1%
31	XNA	Fayetteville, AR	Small	Arkansas	14	13	-1	1,120	1,118	-0.2%	73,724	73,655	-0.1%
14	DAY	Dayton	Small	Ohio	15	15	0	1,662	1,600	-3.7%	120,291	120,057	-0.2%
19	SYR	Syracuse	Small	New York	15	16	1	1,593	1,464	-8.1%	109,254	108,579	-0.6%
43	CAE	Columbia, SC	Small	South Carolina	10	9	-1	961	922	-4.1%	56,103	55,738	-0.7%
30	MHT	Manchester, NH	Small	New Hampshire	13	13	0	1,185	1,178	-0.6%	114,481	113,670	-0.7%

**Domestic**

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
					Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
10	BHM	Birmingham, AL	Small	Alabama	21	18	-3	1,614	1,659	2.8%	153,058	150,736	-1.5%
59	LBB	Lubbock	Small	Texas	6	6	0	561	553	-1.4%	52,596	51,547	-2.0%
65	SRQ	Sarasota	Small	Florida	6	6	0	409	420	2.7%	47,386	46,422	-2.0%
26	FAI	Fairbanks	Small	Alaska	22	18	-4	1,366	1,331	-2.6%	77,043	75,325	-2.2%
15	GEG	Spokane	Small	Washington	13	11	-2	1,460	1,592	9.0%	175,847	171,765	-2.3%
38	BTV	Burlington, VT	Small	Vermont	10	11	1	1,015	988	-2.7%	70,566	68,902	-2.4%
54	EUG	Eugene	Small	Oregon	10	9	-1	740	649	-12.3%	48,575	47,342	-2.5%
18	TYS	Knoxville	Small	Tennessee	18	17	-1	1,517	1,476	-2.7%	96,825	93,858	-3.1%
36	LIH	Kauai Island	Small	Hawaii	10	9	-1	1,217	1,062	-12.7%	158,271	153,346	-3.1%
24	DSM	Des Moines	Small	Iowa	18	18	0	1,529	1,361	-11.0%	121,931	118,000	-3.2%
16	ROC	Rochester, NY	Small	New York	16	16	0	1,665	1,587	-4.7%	128,867	124,498	-3.4%
55	FSD	Sioux Falls	Small	South Dakota	10	10	0	761	649	-14.7%	48,946	46,918	-4.1%
20	TUS	Tucson	Small	Arizona	14	13	-1	1,501	1,444	-3.8%	153,434	145,212	-5.4%
8	PVD	Providence	Small	Rhode Island	18	16	-2	1,972	1,850	-6.2%	192,562	182,002	-5.5%
12	TUL	Tulsa	Small	Oklahoma	19	20	1	1,802	1,623	-9.9%	166,897	157,369	-5.7%
47	HSV	Huntsville	Small	Alabama	9	9	0	803	861	7.2%	64,107	59,860	-6.6%
28	HPN	Westchester County	Small	New York	17	16	-1	1,584	1,293	-18.4%	85,779	79,645	-7.2%
45	FAT	Fresno	Small	California	11	10	-1	1,125	875	-22.2%	68,561	63,199	-7.8%
46	BIL	Billings	Small	Montana	15	14	-1	953	875	-8.2%	55,909	51,507	-7.9%
29	LIT	Little Rock	Small	Arkansas	15	14	-1	1,334	1,290	-3.3%	122,453	111,872	-8.6%
50	COS	Colorado Springs	Small	Colorado	12	10	-2	921	773	-16.1%	72,102	64,829	-10.1%
52	BZN	Bozeman	Small	Montana	14	14	0	767	689	-10.2%	76,718	68,404	-10.8%
60	PSP	Palm Springs	Small	California	9	9	0	689	510	-26.0%	44,602	39,599	-11.2%
34	LGB	Long Beach	Small	California	13	12	-1	1,251	1,071	-14.4%	162,989	140,650	-13.7%
44	MDT	Harrisburg	Small	Pennsylvania	12	9	-3	983	900	-8.4%	71,532	61,526	-14.0%
21	ELP	El Paso	Small	Texas	12	12	0	1,612	1,407	-12.7%	175,011	149,477	-14.6%
62	AMA	Amarillo	Small	Texas	5	5	0	605	492	-18.7%	50,547	40,554	-19.8%
68	BLI	Bellingham	Small	Washington	10	8	-2	416	326	-21.6%	53,581	38,238	-28.6%
<b>Average/Total</b>					<b>970</b>	<b>990</b>	<b>20</b>	<b>78,965</b>	<b>77,169</b>	<b>-2.3%</b>	<b>6,679,205</b>	<b>6,730,474</b>	<b>0.8%</b>

**Domestic**

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats			
					Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.	
112	KEH	Kenmore Air Harbor	Nonhub	Washington	-	7	7	-	149	-	-	-	894	-
176	DXE	Madison, MS	Nonhub	Mississippi	-	3	3	-	36	-	-	-	360	-
115	DHB	Deer Harbor	Nonhub	Washington	-	2	2	-	141	-	-	-	846	-
117	LPS	Lopez Island	Nonhub	Washington	-	2	2	-	141	-	-	-	846	-
118	RCE	Roche Harbor	Nonhub	Washington	-	2	2	-	141	-	-	-	846	-
119	RSJ	Rosario (US)	Nonhub	Washington	-	2	2	-	141	-	-	-	846	-
120	WSX	Westsound	Nonhub	Washington	-	2	2	-	141	-	-	-	846	-
123	ESD	Eastsound	Nonhub	Washington	-	2	2	-	124	-	-	-	1,116	-
187	FRG	Farmingdale	Nonhub	New York	-	1	1	-	18	-	-	-	540	-
193	IFP	Bullhead City	Nonhub	Arizona	-	-	0	-	-	-	-	-	-	-
195	IYK	Inyokern	Nonhub	California	-	-	0	-	-	-	-	-	-	-
196	MOD	Modesto	Nonhub	California	-	-	0	-	-	-	-	-	-	-
197	OXR	Oxnard/Ventura	Nonhub	California	-	-	0	-	-	-	-	-	-	-
198	PMD	Palmdale	Nonhub	California	-	-	0	-	-	-	-	-	-	-
199	FNL	Fort Collins/Loveland	Nonhub	Colorado	-	-	0	-	-	-	-	-	-	-
201	BDR	Bridgeport	Nonhub	Connecticut	-	-	0	-	-	-	-	-	-	-
203	MTH	Marathon, FL	Nonhub	Florida	-	-	0	-	-	-	-	-	-	-
204	PFN	Panama City, FL	Nonhub	Florida	-	-	0	-	-	-	-	-	-	-
206	MYL	McCall, ID	Nonhub	Idaho	-	-	0	-	-	-	-	-	-	-
207	SMN	Salmon, ID	Nonhub	Idaho	-	-	0	-	-	-	-	-	-	-
208	PWK	Chicago	Nonhub	Illinois	-	-	0	-	-	-	-	-	-	-
210	BED	Bedford/Hanscom	Nonhub	Massachusetts	-	-	0	-	-	-	-	-	-	-
211	CEF	Springfield, MA	Nonhub	Massachusetts	-	-	0	-	-	-	-	-	-	-
212	LWT	Lewistown, MT	Nonhub	Montana	-	-	0	-	-	-	-	-	-	-
213	MLS	Miles City, MT	Nonhub	Montana	-	-	0	-	-	-	-	-	-	-
214	ELY	Ely, NV	Nonhub	Nevada	-	-	0	-	-	-	-	-	-	-
215	ALM	Alamogordo, NM	Nonhub	New Mexico	-	-	0	-	-	-	-	-	-	-
216	GUP	Gallup, NM	Nonhub	New Mexico	-	-	0	-	-	-	-	-	-	-
217	HTO	East Hampton	Nonhub	New York	-	-	0	-	-	-	-	-	-	-
218	JRB	New York, NY	Nonhub	New York	-	-	0	-	-	-	-	-	-	-
219	TSS	East 34th Street Heliport, NY	Nonhub	New York	-	-	0	-	-	-	-	-	-	-
220	ISO	Kinston	Nonhub	North Carolina	-	-	0	-	-	-	-	-	-	-
221	SOP	Southern Pines	Nonhub	North Carolina	-	-	0	-	-	-	-	-	-	-
222	LMT	Klamath Falls	Nonhub	Oregon	-	-	0	-	-	-	-	-	-	-
223	SLE	Salem, OR	Nonhub	Oregon	-	-	0	-	-	-	-	-	-	-
224	WST	Westerly	Nonhub	Rhode Island	-	-	0	-	-	-	-	-	-	-
225	BKX	Brookings, SD	Nonhub	South Dakota	-	-	0	-	-	-	-	-	-	-
226	DRT	Del Rio, TX	Nonhub	Texas	-	-	0	-	-	-	-	-	-	-
228	ODW	Oak Harbor, WA	Nonhub	Washington	-	-	0	-	-	-	-	-	-	-
229	BLF	Bluefield, WV	Nonhub	West Virginia	-	-	0	-	-	-	-	-	-	-
230	ARV	Minocqua, WI	Nonhub	Wisconsin	-	-	0	-	-	-	-	-	-	-
231	EGV	Eagle River, WI	Nonhub	Wisconsin	-	-	0	-	-	-	-	-	-	-
2	LKE	Seattle	Nonhub	Washington	1	7	6	31	968	3022.6%	-	186	5,808	3022.6%
179	USA	Concord, NC	Nonhub	North Carolina	1	3	2	4	32	700.0%	-	708	5,455	670.5%
108	FRD	Friday Harbor	Nonhub	Washington	1	2	1	31	155	400.0%	-	279	1,395	400.0%
189	BLV	Belleville	Nonhub	Illinois	1	2	1	3	14	366.7%	-	498	2,335	368.9%
116	FBS	Friday Harbor SPB	Nonhub	Washington	1	2	1	31	141	354.8%	-	186	846	354.8%
97	BFI	Seattle	Nonhub	Washington	2	2	0	62	184	196.8%	-	558	1,656	196.8%
184	NEW	New Orleans, LA	Nonhub	Louisiana	1	2	1	10	27	170.0%	-	100	270	170.0%
164	LCK	Columbus Rickenbaker, OH	Nonhub	Ohio	3	6	3	30	61	103.3%	-	5,046	10,269	103.5%

## Domestic

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
					Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
114	LBE	Latrobe	Nonhub	Pennsylvania	3	5	2	84	147	75.0%	14,226	25,407	78.6%
85	PGD	Punta Gorda, FL	Nonhub	Florida	17	22	5	129	225	74.4%	21,414	37,493	75.1%
192	PSM	Portsmouth, NH	Nonhub	New Hampshire	1	1	0	3	5	66.7%	498	830	66.7%
30	EVV	Evansville	Nonhub	Indiana	4	5	1	362	502	38.7%	18,280	28,174	54.1%
144	TWF	Twin Falls	Nonhub	Idaho	1	1	0	61	88	44.3%	3,050	4,400	44.3%
130	EAT	Wenatchee	Nonhub	Washington	1	1	0	87	119	36.8%	6,612	9,044	36.8%
78	BRO	Brownsville	Nonhub	Texas	2	3	1	203	241	18.7%	9,643	13,081	35.7%
160	GUC	Gunnison	Nonhub	Colorado	2	2	0	57	63	10.5%	3,010	4,070	35.2%
134	TOL	Toledo	Nonhub	Ohio	4	4	0	97	112	15.5%	6,043	7,881	30.4%
173	YNG	Youngstown	Nonhub	Ohio	4	4	0	35	45	28.6%	5,810	7,536	29.7%
15	EYW	Key West	Nonhub	Florida	7	6	-1	523	597	14.1%	27,784	34,388	23.8%
126	COU	Columbia, MO	Nonhub	Missouri	2	2	0	122	122	0.0%	5,626	6,880	22.3%
152	CYS	Cheyenne	Nonhub	Wyoming	1	1	0	68	83	22.1%	612	747	22.1%
92	LCH	Lake Charles	Nonhub	Louisiana	2	2	0	172	198	15.1%	8,119	9,887	21.8%
159	ALW	Walla Walla	Nonhub	Washington	1	1	0	56	68	21.4%	4,256	5,168	21.4%
158	IAG	Niagara Falls	Nonhub	New York	5	6	1	44	68	54.5%	7,661	9,241	20.6%
56	LNK	Lincoln	Nonhub	Nebraska	3	4	1	283	322	13.8%	14,150	16,999	20.1%
81	CPR	Casper	Nonhub	Wyoming	3	3	0	204	234	14.7%	10,664	12,744	19.5%
42	BIS	Bismarck	Nonhub	North Dakota	5	7	2	352	412	17.0%	23,911	28,182	17.9%
40	MFE	McAllen	Nonhub	Texas	5	5	0	415	422	1.7%	38,555	45,184	17.2%
149	GCC	Gillette	Nonhub	Wyoming	3	2	-1	124	87	-29.8%	3,720	4,350	16.9%
6	FWA	Fort Wayne	Nonhub	Indiana	10	12	2	562	657	16.9%	33,127	38,363	15.8%
107	SGU	St George	Nonhub	Utah	2	2	0	203	155	-23.6%	6,730	7,750	15.2%
185	UST	St. Augustine, FL	Nonhub	Florida	1	2	1	13	22	69.2%	1,794	2,064	15.1%
141	PUW	Pullman	Nonhub	Washington	1	1	0	80	92	15.0%	6,080	6,992	15.0%
129	FMN	Farmington	Nonhub	New Mexico	3	3	0	104	119	14.4%	936	1,071	14.4%
21	MFR	Medford	Nonhub	Oregon	7	8	1	549	576	4.9%	37,182	42,188	13.5%
28	PSC	Pasco	Nonhub	Washington	9	9	0	514	509	-1.0%	36,762	41,208	12.1%
83	TYR	Tyler	Nonhub	Texas	2	2	0	224	228	1.8%	10,192	11,400	11.9%
73	ISN	Williston	Nonhub	North Dakota	3	3	0	233	259	11.2%	11,650	12,950	11.2%
88	STS	Santa Rosa	Nonhub	California	4	4	0	189	210	11.1%	14,364	15,960	11.1%
162	RDD	Redding	Nonhub	California	1	1	0	93	62	-33.3%	2,790	3,100	11.1%
140	ROW	Roswell	Nonhub	New Mexico	1	1	0	87	93	6.9%	4,212	4,650	10.4%
18	TVC	Traverse City	Nonhub	Michigan	7	7	0	533	590	10.7%	37,809	41,735	10.4%
174	PAK	Atlanta	Nonhub	Georgia	2	3	1	39	43	10.3%	390	430	10.3%
11	CHA	Chattanooga	Nonhub	Tennessee	8	8	0	615	626	1.8%	34,995	38,426	9.8%
36	AVP	Wilkes-Barre	Nonhub	Pennsylvania	7	7	0	421	461	9.5%	20,928	22,942	9.6%
111	HTS	Huntington	Nonhub	West Virginia	4	5	1	155	150	-3.2%	11,788	12,902	9.5%
168	LUK	Cincinnati	Nonhub	Ohio	3	3	0	54	59	9.3%	1,620	1,770	9.3%
33	BGR	Bangor	Nonhub	Maine	7	7	0	495	498	0.6%	32,501	35,380	8.9%
96	GFK	Grand Forks	Nonhub	North Dakota	4	4	0	186	186	0.0%	11,937	12,979	8.7%
17	TLH	Tallahassee	Nonhub	Florida	6	7	1	543	590	8.7%	36,188	39,035	7.9%
16	CHO	Charlotteville	Nonhub	Virginia	6	6	0	600	594	-1.0%	27,355	29,190	6.7%
104	MTJ	Montrose	Nonhub	Colorado	3	5	2	156	161	3.2%	9,952	10,573	6.2%
84	LRD	Laredo	Nonhub	Texas	4	4	0	227	227	0.0%	13,136	13,935	6.1%
46	MRY	Monterey	Nonhub	California	5	5	0	439	392	-10.7%	21,580	22,846	5.9%
172	RFD	Chicago	Nonhub	Illinois	5	5	0	42	45	7.1%	6,992	7,391	5.7%
175	PVU	Provo	Nonhub	Utah	3	3	0	36	38	5.6%	5,616	5,928	5.6%
79	RST	Rochester, MN	Nonhub	Minnesota	2	3	1	256	235	-8.2%	12,410	13,092	5.5%
13	AVL	Asheville	Nonhub	North Carolina	11	10	-1	652	611	-6.3%	44,361	46,716	5.3%
69	CWA	Wausau	Nonhub	Wisconsin	3	3	0	260	269	3.5%	12,796	13,450	5.1%

## Domestic

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
					Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
145	DBQ	Dubuque	Nonhub	Iowa	1	1	0	84	88	4.8%	4,200	4,400	4.8%
12	RAP	Rapid City	Nonhub	South Dakota	9	9	0	598	612	2.3%	37,367	39,140	4.7%
7	SBA	Santa Barbara	Nonhub	California	6	6	0	690	656	-4.9%	36,506	38,133	4.5%
14	SHV	Shreveport	Nonhub	Louisiana	6	6	0	605	602	-0.5%	33,104	34,535	4.3%
103	SPI	Springfield	Nonhub	Illinois	4	4	0	160	163	1.9%	8,928	9,310	4.3%
10	ILM	Wilmington, NC	Nonhub	North Carolina	5	5	0	606	637	5.1%	40,810	42,362	3.8%
110	SJT	San Angelo	Nonhub	Texas	1	1	0	148	150	1.4%	7,244	7,500	3.5%
177	MMU	Morristown	Nonhub	New Jersey	2	2	0	33	34	3.0%	990	1,020	3.0%
62	MLU	Monroe	Nonhub	Louisiana	3	3	0	288	286	-0.7%	13,880	14,300	3.0%
157	PIH	Pocatello	Nonhub	Idaho	1	1	0	114	70	-38.6%	3,420	3,500	2.3%
109	LWS	Lewiston	Nonhub	Idaho	4	4	0	150	153	2.0%	9,840	10,068	2.3%
19	VPS	Fort Walton Beach	Nonhub	Florida	5	5	0	579	587	1.4%	41,375	42,205	2.0%
82	ERI	Erie	Nonhub	Pennsylvania	3	3	0	229	233	1.7%	10,319	10,506	1.8%
166	GGG	Longview	Nonhub	Texas	1	1	0	59	60	1.7%	2,950	3,000	1.7%
60	AEX	Alexandria, LA	Nonhub	Louisiana	3	3	0	295	295	0.0%	14,508	14,750	1.7%
113	ACT	Waco	Nonhub	Texas	1	1	0	147	148	0.7%	7,290	7,400	1.5%
143	BPT	Beaumont	Nonhub	Texas	1	1	0	91	91	0.0%	4,484	4,550	1.5%
190	OGD	Ogden, UT	Nonhub	Utah	1	1	0	9	9	0.0%	1,404	1,424	1.4%
148	YKM	Yakima	Nonhub	Washington	1	1	0	86	87	1.2%	6,536	6,612	1.2%
146	GTR	Columbus	Nonhub	Mississippi	1	1	0	87	88	1.1%	4,350	4,400	1.1%
142	TXK	Texarkana	Nonhub	Arkansas	1	1	0	90	91	1.1%	4,500	4,550	1.1%
106	MHK	Manhattan	Nonhub	Kansas	2	2	0	153	155	1.3%	7,482	7,564	1.1%
131	DHN	Dothan	Nonhub	Alabama	1	1	0	116	117	0.9%	5,800	5,850	0.9%
64	HRL	Harlingen	Nonhub	Texas	3	3	0	285	283	-0.7%	27,005	27,210	0.8%
102	FLG	Flagstaff	Nonhub	Arizona	1	1	0	168	169	0.6%	8,400	8,450	0.6%
87	CLL	College Station	Nonhub	Texas	2	2	0	231	219	-5.2%	10,883	10,938	0.5%
35	ABE	Allentown	Nonhub	Pennsylvania	9	9	0	507	493	-2.8%	33,452	33,592	0.4%
29	SBN	South Bend	Nonhub	Indiana	11	10	-1	530	505	-4.7%	31,819	31,918	0.3%
147	VLD	Valdosta	Nonhub	Georgia	1	1	0	87	87	0.0%	4,350	4,350	0.0%
151	MQT	Marquette	Nonhub	Michigan	2	2	0	85	85	0.0%	4,250	4,250	0.0%
163	ORH	Worcester	Nonhub	Massachusetts	2	2	0	62	62	0.0%	6,200	6,200	0.0%
180	GCV	Grand Canyon	Nonhub	Arizona	1	1	0	31	31	0.0%	186	186	0.0%
181	MMH	Mammoth Lakes	Nonhub	California	1	1	0	31	31	0.0%	2,356	2,356	0.0%
182	BLD	Las Vegas	Nonhub	Nevada	1	1	0	31	31	0.0%	186	186	0.0%
186	GCN	Grand Canyon	Nonhub	Arizona	1	1	0	21	21	0.0%	189	189	0.0%
188	APF	Naples (US)	Nonhub	Florida	1	1	0	17	17	0.0%	170	170	0.0%
167	DSI	Destin, FL	Nonhub	Florida	5	4	-1	59	59	0.0%	590	590	0.0%
31	FCA	Kalispell	Nonhub	Montana	10	10	0	524	502	-4.2%	42,696	42,642	-0.1%
98	SBY	Salisbury	Nonhub	Maryland	2	2	0	180	179	-0.6%	7,453	7,429	-0.3%
39	AGS	Augusta, GA	Nonhub	Georgia	2	2	0	418	424	1.4%	26,596	26,411	-0.7%
52	PVC	Provincetown	Nonhub	Massachusetts	2	2	0	370	367	-0.8%	3,330	3,303	-0.8%
49	SCE	State College	Nonhub	Pennsylvania	5	5	0	380	378	-0.5%	17,232	17,080	-0.9%
20	PIA	Peoria	Nonhub	Illinois	10	11	1	592	578	-2.4%	35,043	34,705	-1.0%
150	IPT	Williamsport	Nonhub	Pennsylvania	1	1	0	87	86	-1.1%	3,219	3,182	-1.1%
8	<b>ROA</b>	<b>Roanoke</b>	<b>Nonhub</b>	<b>Virginia</b>	<b>9</b>	<b>8</b>	<b>-1</b>	<b>688</b>	<b>656</b>	<b>-4.7%</b>	<b>36,740</b>	<b>36,272</b>	<b>-1.3%</b>
9	MLI	Moline	Nonhub	Illinois	10	10	0	678	639	-5.8%	40,319	39,733	-1.5%
32	RDM	Redmond	Nonhub	Oregon	6	6	0	565	499	-11.7%	32,512	31,918	-1.8%
171	HOB	Hobbs	Nonhub	New Mexico	1	1	0	52	51	-1.9%	2,600	2,550	-1.9%
5	BTR	Baton Rouge	Nonhub	Louisiana	4	4	0	786	730	-7.1%	41,843	40,942	-2.2%
128	SPS	Wichita Falls	Nonhub	Texas	1	1	0	122	122	0.0%	6,022	5,890	-2.2%
90	SAF	Santa Fe	Nonhub	New Mexico	3	3	0	202	201	-0.5%	9,812	9,588	-2.3%

Domestic

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
					Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
44	ASE	Aspen	Nonhub	Colorado	5	5	0	416	407	-2.2%	29,000	28,313	-2.4%
127	LAW	Lawton	Nonhub	Oklahoma	1	1	0	123	122	-0.8%	6,150	5,998	-2.5%
135	HVN	New Haven	Nonhub	Connecticut	1	1	0	113	110	-2.7%	4,181	4,070	-2.7%
54	LAN	Lansing	Nonhub	Michigan	6	4	-2	377	347	-8.0%	23,410	22,760	-2.8%
26	LFT	Lafayette	Nonhub	Louisiana	4	4	0	560	519	-7.3%	29,795	28,756	-3.5%
100	LYH	Lynchburg	Nonhub	Virginia	1	1	0	177	172	-2.8%	8,850	8,535	-3.6%
23	GRB	Green Bay	Nonhub	Wisconsin	4	4	0	581	540	-7.1%	38,570	37,062	-3.9%
34	JAC	Jackson, WY	Nonhub	Wyoming	9	9	0	488	497	1.8%	60,944	58,513	-4.0%
41	GJT	Grand Junction	Nonhub	Colorado	7	7	0	427	417	-2.3%	25,265	24,218	-4.1%
68	ELM	Elmira/Corning	Nonhub	New York	5	5	0	318	278	-12.6%	17,883	17,113	-4.3%
57	MOT	Minot	Nonhub	North Dakota	4	4	0	318	320	0.6%	20,998	20,093	-4.3%
65	MBS	Saginaw	Nonhub	Michigan	4	3	-1	317	280	-11.7%	15,850	15,144	-4.5%
38	ATW	Appleton	Nonhub	Wisconsin	7	7	0	455	426	-6.4%	29,628	28,295	-4.5%
93	CMI	Champaign	Nonhub	Illinois	2	2	0	208	195	-6.3%	10,214	9,738	-4.7%
170	SCK	Sacramento	Nonhub	California	3	2	-1	54	53	-1.9%	9,212	8,728	-5.3%
51	GRK	Killeen	Nonhub	Texas	3	3	0	409	372	-9.0%	20,922	19,804	-5.3%
50	TRI	Tri-Cities	Nonhub	Tennessee	4	4	0	363	375	3.3%	25,358	23,971	-5.5%
74	ITH	Ithaca	Nonhub	New York	3	3	0	268	255	-4.9%	10,852	10,241	-5.6%
59	BMI	Bloomington	Nonhub	Illinois	7	7	0	337	295	-12.5%	21,334	20,112	-5.7%
86	MLB	Melbourne, FL	Nonhub	Florida	2	2	0	206	220	6.8%	21,858	20,593	-5.8%
75	SWF	Newburgh	Nonhub	New York	5	5	0	266	253	-4.9%	16,500	15,516	-6.0%
91	HLN	Helena	Nonhub	Montana	5	5	0	211	199	-5.7%	12,968	12,179	-6.1%
25	CRP	Corpus Christi	Nonhub	Texas	3	3	0	586	522	-10.9%	42,397	39,782	-6.2%
37	GNV	Gainesville	Nonhub	Florida	5	4	-1	444	436	-1.8%	23,294	21,686	-6.9%
153	ABY	Albany, GA	Nonhub	Georgia	1	1	0	86	80	-7.0%	4,300	4,000	-7.0%
58	OAJ	Jacksonville, NC	Nonhub	North Carolina	2	2	0	350	308	-12.0%	18,723	17,362	-7.3%
3	MVY	Martha's Vineyard	Nonhub	Massachusetts	10	9	-1	1,033	862	-16.6%	18,394	17,049	-7.3%
63	AZO	Kalamazoo	Nonhub	Michigan	4	3	-1	354	284	-19.8%	17,700	16,374	-7.5%
139	HDN	Hayden	Nonhub	Colorado	2	2	0	96	93	-3.1%	6,417	5,931	-7.6%
94	SUN	Sun Valley	Nonhub	Idaho	5	5	0	207	190	-8.2%	14,427	13,322	-7.7%
22	MOB	Mobile	Nonhub	Alabama	5	5	0	593	563	-5.1%	34,882	32,064	-8.1%
1	ACK	Nantucket	Nonhub	Massachusetts	11	9	-2	2,501	2,179	-12.9%	42,306	38,869	-8.1%
165	BKG	Branson	Nonhub	Missouri	3	6	3	85	60	-29.4%	5,844	5,340	-8.6%
156	SMX	Santa Maria	Nonhub	California	2	2	0	124	75	-39.5%	5,760	5,258	-8.7%
43	PHF	Newport News	Nonhub	Virginia	5	3	-2	469	410	-12.6%	24,226	22,066	-8.9%
154	BQK	Brunswick	Nonhub	Georgia	1	1	0	88	80	-9.1%	4,400	4,000	-9.1%
122	PIR	Pierre	Nonhub	South Dakota	3	3	0	217	124	-42.9%	1,953	1,767	-9.5%
71	DLH	Duluth	Nonhub	Minnesota	4	2	-2	313	263	-16.0%	19,343	17,326	-10.4%
45	FAY	Fayetteville, NC	Nonhub	North Carolina	3	3	0	455	406	-10.8%	25,724	22,872	-11.1%
48	DRO	Durango	Nonhub	Colorado	3	3	0	395	379	-4.1%	26,057	23,167	-11.1%
66	EWB	New Bedford	Nonhub	Massachusetts	2	2	0	315	279	-11.4%	2,835	2,511	-11.4%
137	CSG	Columbus, GA	Nonhub	Georgia	1	1	0	116	102	-12.1%	5,800	5,100	-12.1%
89	ABI	Abilene	Nonhub	Texas	1	1	0	237	210	-11.4%	11,328	9,954	-12.1%
67	TTN	Philadelphia	Nonhub	New Jersey	17	11	-6	318	279	-12.3%	43,884	38,502	-12.3%
80	DAB	Daytona Beach	Nonhub	Florida	2	2	0	243	234	-3.7%	30,701	26,843	-12.6%
53	MGM	Montgomery	Nonhub	Alabama	3	3	0	374	347	-7.2%	20,338	17,764	-12.7%
24	CRW	Charleston, WV	Nonhub	West Virginia	10	8	-2	622	539	-13.3%	32,064	27,665	-13.7%
138	EGE	Vail	Nonhub	Colorado	3	3	0	108	96	-11.1%	11,672	9,911	-15.1%
77	BGM	Binghamton	Nonhub	New York	3	3	0	283	242	-14.5%	11,836	10,020	-15.3%
70	BFL	Bakersfield	Nonhub	California	5	4	-1	320	265	-17.2%	17,130	14,470	-15.5%
61	IDA	Idaho Falls	Nonhub	Idaho	7	7	0	359	292	-18.7%	24,184	20,368	-15.8%

## Domestic

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
					Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
47	GPT	Gulfport/Biloxi	Nonhub	Mississippi	5	5	0	475	385	-18.9%	32,015	26,684	-16.7%
125	ACV	Arcata/Eureka	Nonhub	California	3	1	-2	270	123	-54.4%	8,100	6,750	-16.7%
99	YUM	Yuma	Nonhub	Arizona	2	1	-1	234	174	-25.6%	10,460	8,700	-16.8%
4	HYA	Hyannis	Nonhub	Massachusetts	5	5	0	1,095	854	-22.0%	13,096	10,856	-17.1%
55	GTF	Great Falls	Nonhub	Montana	8	7	-1	376	337	-10.4%	27,414	22,642	-17.4%
76	EWN	New Bern	Nonhub	North Carolina	2	2	0	295	243	-17.6%	14,659	12,085	-17.6%
101	FSM	Fort Smith	Nonhub	Arkansas	2	2	0	205	170	-17.1%	10,172	8,362	-17.8%
72	SBP	San Luis Obispo	Nonhub	California	3	3	0	460	259	-43.7%	17,766	14,279	-19.6%
27	MSO	Missoula	Nonhub	Montana	12	12	0	691	515	-25.5%	53,486	42,774	-20.0%
121	OTH	North Bend	Nonhub	Oregon	2	3	1	160	140	-12.5%	3,941	3,080	-21.8%
136	BID	Block Island	Nonhub	Rhode Island	1	1	0	140	108	-22.9%	1,260	972	-22.9%
95	LSE	La Crosse	Nonhub	Wisconsin	3	2	-1	257	188	-26.8%	12,850	9,370	-27.1%
133	DIK	Dickinson	Nonhub	North Dakota	2	2	0	158	113	-28.5%	7,900	5,650	-28.5%
105	HHH	Hilton Head Island	Nonhub	South Carolina	2	1	-1	224	158	-29.5%	8,288	5,846	-29.5%
132	FLO	Florence, SC	Nonhub	South Carolina	1	1	0	170	117	-31.2%	7,772	5,148	-33.8%
183	EKO	Elko	Nonhub	Nevada	1	1	0	81	30	-63.0%	2,430	1,500	-38.3%
169	RKS	Rock Springs	Nonhub	Wyoming	3	1	-2	154	57	-63.0%	4,620	2,850	-38.3%
178	OLV	Olive Branch, MS	Nonhub	Mississippi	3	4	1	58	32	-44.8%	580	320	-44.8%
155	GLH	Greenville (US) MS	Nonhub	Mississippi	1	1	0	52	78	50.0%	1,768	702	-60.3%
124	RIW	Riverton	Nonhub	Wyoming	2	2	0	150	124	-17.3%	2,850	1,116	-60.8%
161	CLD	San Diego	Nonhub	California	1	1	0	230	62	-73.0%	6,900	1,984	-71.2%
191	STC	St Cloud	Nonhub	Minnesota	2	1	-1	69	7	-89.9%	4,192	1,092	-74.0%
194	CIC	Chico	Nonhub	California	1	-	-1	89	-	-100.0%	2,670	-	-100.0%
200	TEX	Telluride	Nonhub	Colorado	1	-	-1	37	-	-100.0%	703	-	-100.0%
205	AHN	Athens (US)	Nonhub	Georgia	1	-	-1	52	-	-100.0%	468	-	-100.0%
209	FOE	Topeka	Nonhub	Kansas	1	-	-1	56	-	-100.0%	2,800	-	-100.0%
227	CLM	Port Angeles	Nonhub	Washington	1	-	-1	31	-	-100.0%	279	-	-100.0%
232	SHR	Sheridan	Nonhub	Wyoming	1	-	-1	77	-	-100.0%	2,310	-	-100.0%
202	ILG	Wilmington, DE	Nonhub	Delaware	7	-	-7	80	-	-100.0%	13,440	-	-100.0%
<b>Average/Total</b>					<b>688</b>	<b>705</b>	<b>17</b>	<b>50,558</b>	<b>49,573</b>	<b>-1.9%</b>	<b>2,774,968</b>	<b>2,776,442</b>	<b>0.1%</b>

**Domestic**

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats			
					Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.	
68	FOD	Fort Dodge	EAS	Iowa	-	2	2	-	125	-	-	-	1,000	-
69	MCW	Mason City	EAS	Iowa	-	2	2	-	125	-	-	-	1,000	-
95	TVF	Thief River Falls	EAS	Minnesota	-	1	1	-	62	-	-	-	558	-
30	BFF	Scottsbluff	EAS	Nebraska	1	2	1	69	93	34.8%	621	2,790	349.3%	
76	SVC	Silver City	EAS	New Mexico	1	1	0	31	104	235.5%	279	936	235.5%	
47	LBF	North Platte	EAS	Nebraska	1	1	0	68	62	-8.8%	612	1,860	203.9%	
56	LBL	Liberal	EAS	Kansas	1	1	0	61	83	36.1%	549	1,293	135.5%	
8	MEI	Meridian	EAS	Mississippi	1	2	1	52	83	59.6%	1,768	4,150	134.7%	
13	HGR	Hagerstown	EAS	Maryland	2	3	1	108	118	9.3%	1,600	3,408	113.0%	
58	DDC	Dodge City	EAS	Kansas	2	2	0	62	83	33.9%	558	1,188	112.9%	
64	HON	Huron	EAS	South Dakota	1	2	1	62	124	100.0%	558	1,116	100.0%	
74	VIS	Visalia	EAS	California	1	2	1	57	104	82.5%	513	936	82.5%	
9	HIB	Hibbing/Chisholm	EAS	Minnesota	1	2	1	53	82	54.7%	2,650	4,100	54.7%	
51	MBL	Manistee	EAS	Michigan	1	2	1	49	51	4.1%	997	1,530	53.5%	
40	PIB	Laurel	EAS	Mississippi	1	2	1	52	52	0.0%	1,768	2,600	47.1%	
42	LAR	Laramie	EAS	Wyoming	1	1	0	62	52	-16.1%	1,860	2,600	39.8%	
7	CKB	Clarksburg	EAS	West Virginia	3	5	2	81	88	8.6%	3,150	4,312	36.9%	
34	DUJ	Dubois	EAS	Pennsylvania	2	2	0	104	78	-25.0%	1,976	2,652	34.2%	
36	PKB	Parkersburg/Marietta	EAS	West Virginia	1	2	1	104	78	-25.0%	1,976	2,652	34.2%	
10	JST	Johnstown	EAS	Pennsylvania	2	2	0	83	109	31.3%	2,822	3,706	31.3%	
33	WYS	West Yellowstone	EAS	Montana	1	1	0	72	54	-25.0%	2,160	2,700	25.0%	
48	RKD	Rockland	EAS	Maine	1	1	0	155	186	20.0%	1,395	1,674	20.0%	
55	LNS	Lancaster	EAS	Pennsylvania	1	2	1	130	130	0.0%	1,170	1,300	11.1%	
16	CIU	Sault Ste Marie (US)	EAS	Michigan	1	1	0	56	62	10.7%	2,800	3,100	10.7%	
1	PBG	Plattsburgh	EAS	New York	5	5	0	126	131	4.0%	14,111	14,974	6.1%	
14	GCK	Garden City	EAS	Kansas	1	1	0	61	62	1.6%	2,942	3,100	5.4%	
20	JLN	Joplin	EAS	Missouri	1	1	0	59	62	5.1%	2,950	3,100	5.1%	
41	CDC	Cedar City	EAS	Utah	1	1	0	83	52	-37.3%	2,490	2,600	4.4%	
31	OWB	Owensboro	EAS	Kentucky	2	2	0	91	92	1.1%	2,623	2,712	3.4%	
89	CVN	Clovis	EAS	New Mexico	1	1	0	78	80	2.6%	702	720	2.6%	
2	GRI	Grand Island	EAS	Nebraska	3	3	0	74	75	1.4%	5,650	5,768	2.1%	
37	HYS	Hays	EAS	Kansas	1	1	0	51	52	2.0%	2,550	2,600	2.0%	
22	ART	Watertown (US) NY	EAS	New York	1	1	0	61	62	1.6%	3,050	3,100	1.6%	
52	UIN	Quincy	EAS	Illinois	1	1	0	157	159	1.3%	1,413	1,431	1.3%	
6	RHI	Rhineland	EAS	Wisconsin	2	2	0	88	88	0.0%	4,400	4,400	0.0%	
11	JMS	Jamestown (US) ND	EAS	North Dakota	2	2	0	74	74	0.0%	3,700	3,700	0.0%	
12	MGW	Morgantown	EAS	West Virginia	2	3	1	104	104	0.0%	3,536	3,536	0.0%	
15	PAH	Paducah	EAS	Kentucky	1	1	0	62	62	0.0%	3,100	3,100	0.0%	
17	CMX	Hancock	EAS	Michigan	1	1	0	62	62	0.0%	3,100	3,100	0.0%	
18	MKG	Muskegon	EAS	Michigan	1	1	0	62	62	0.0%	3,100	3,100	0.0%	
19	BJI	Bemidji	EAS	Minnesota	1	1	0	62	62	0.0%	3,100	3,100	0.0%	
23	ABR	Aberdeen (US)	EAS	South Dakota	1	1	0	62	62	0.0%	3,100	3,100	0.0%	
24	EAU	Eau Claire	EAS	Wisconsin	1	1	0	62	62	0.0%	3,100	3,100	0.0%	
26	ALO	Waterloo	EAS	Iowa	1	1	0	57	57	0.0%	2,850	2,850	0.0%	
28	IMT	Iron Mountain	EAS	Michigan	2	2	0	57	57	0.0%	2,850	2,850	0.0%	
29	PQI	Presque Isle	EAS	Maine	1	1	0	83	83	0.0%	2,822	2,822	0.0%	
<b>35</b>	<b>SHD</b>	<b>Staunton</b>	<b>EAS</b>	<b>Virginia</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>78</b>	<b>78</b>	<b>0.0%</b>	<b>2,652</b>	<b>2,652</b>	<b>0.0%</b>	
38	APN	Alpena	EAS	Michigan	2	1	-1	52	52	0.0%	2,600	2,600	0.0%	
39	ESC	Escanaba	EAS	Michigan	1	1	0	52	52	0.0%	2,600	2,600	0.0%	
43	DVL	Devils Lake	EAS	North Dakota	2	2	0	48	48	0.0%	2,400	2,400	0.0%	
44	BHB	Bar Harbor	EAS	Maine	1	1	0	93	93	0.0%	2,387	2,387	0.0%	

**Domestic**

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
					Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
45	LWB	Lewisburg	EAS	West Virginia	2	2	0	62	62	0.0%	2,108	2,108	0.0%
53	MWA	Marion	EAS	Illinois	1	1	0	156	156	0.0%	1,404	1,404	0.0%
54	SDY	Sidney	EAS	Montana	1	1	0	155	155	0.0%	1,395	1,395	0.0%
57	DEC	Decatur	EAS	Illinois	2	2	0	156	156	0.0%	1,248	1,248	0.0%
62	AUG	Augusta (US) ME	EAS	Maine	1	1	0	124	124	0.0%	1,116	1,116	0.0%
67	PGA	Page	EAS	Arizona	4	3	-1	114	114	0.0%	1,026	1,026	0.0%
70	ALS	Alamosa	EAS	Colorado	2	2	0	109	109	0.0%	981	981	0.0%
72	ELD	El Dorado	EAS	Arkansas	2	2	0	104	104	0.0%	936	936	0.0%
73	IPL	Imperial	EAS	California	2	2	0	104	104	0.0%	936	936	0.0%
75	CGI	Cape Girardeau	EAS	Missouri	1	1	0	104	104	0.0%	936	936	0.0%
77	HRO	Harrison	EAS	Arkansas	2	2	0	99	99	0.0%	891	891	0.0%
78	BRL	Burlington (US) IA	EAS	Iowa	2	2	0	109	109	0.0%	872	872	0.0%
79	PDT	Pendleton	EAS	Oregon	1	1	0	94	94	0.0%	846	846	0.0%
80	IRK	Kirkville	EAS	Missouri	1	1	0	93	93	0.0%	837	837	0.0%
81	MSS	Massena	EAS	New York	1	1	0	93	93	0.0%	837	837	0.0%
82	OGS	Ogdensburg	EAS	New York	1	1	0	93	93	0.0%	837	837	0.0%
85	RUT	Rutland	EAS	Vermont	1	1	0	93	93	0.0%	837	837	0.0%
87	PRC	Prescott	EAS	Arizona	1	1	0	88	88	0.0%	792	792	0.0%
90	HOT	Hot Springs	EAS	Arkansas	2	2	0	78	78	0.0%	702	702	0.0%
92	JBR	Jonesboro	EAS	Arkansas	1	1	0	78	78	0.0%	624	624	0.0%
93	IWD	Ironwood	EAS	Michigan	1	1	0	78	78	0.0%	624	624	0.0%
96	GDV	Glendive	EAS	Montana	1	1	0	62	62	0.0%	558	558	0.0%
97	GGW	Glasgow (US)	EAS	Montana	1	1	0	62	62	0.0%	558	558	0.0%
98	OLF	Wolf Point	EAS	Montana	1	1	0	62	62	0.0%	558	558	0.0%
100	MCE	Merced	EAS	California	1	1	0	57	57	0.0%	513	513	0.0%
101	CEZ	Cortez	EAS	Colorado	1	1	0	57	57	0.0%	513	513	0.0%
106	MCK	Mccook	EAS	Nebraska	1	1	0	21	21	0.0%	189	189	0.0%
60	TBN	Fort Leonard Wood	EAS	Missouri	1	1	0	129	128	-0.8%	1,161	1,152	-0.8%
49	LEB	Lebanon	EAS	New Hampshire	2	2	0	192	186	-3.1%	1,728	1,674	-3.1%
83	SLK	Saranac Lake	EAS	New York	2	1	-1	96	93	-3.1%	864	837	-3.1%
5	COD	Cody	EAS	Wyoming	3	3	0	103	97	-5.8%	5,210	4,930	-5.4%
4	PLN	Pellston	EAS	Michigan	1	2	1	109	103	-5.5%	5,450	4,976	-8.7%
102	SOW	Show Low	EAS	Arizona	2	1	-1	57	52	-8.8%	513	468	-8.8%
103	CNM	Carlsbad	EAS	New Mexico	1	2	1	52	52	0.0%	520	468	-10.0%
50	BKW	Beckley	EAS	West Virginia	2	1	-1	52	52	0.0%	1,768	1,560	-11.8%
32	INL	International Falls	EAS	Minnesota	2	2	0	62	54	-12.9%	3,100	2,700	-12.9%
21	BTM	Butte	EAS	Montana	1	1	0	74	62	-16.2%	3,700	3,100	-16.2%
46	EAR	Kearney	EAS	Nebraska	1	1	0	88	62	-29.5%	2,262	1,860	-17.8%

**Domestic**

Rank	Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
					Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
88	VCT	Victoria (US)	EAS	Texas	1	1	0	104	39	-62.5%	936	741	-20.8%
3	PGV	Greenville	EAS	North Carolina	1	1	0	146	114	-21.9%	7,300	5,700	-21.9%
25	BRD	Brainerd	EAS	Minnesota	2	1	-1	79	60	-24.1%	3,950	3,000	-24.1%
84	ATY	Watertown (US) SD	EAS	South Dakota	2	1	-1	124	93	-25.0%	1,116	837	-25.0%
91	SLN	Salina	EAS	Kansas	2	1	-1	104	78	-25.0%	936	702	-25.0%
66	BFD	Bradford	EAS	Pennsylvania	2	1	-1	78	104	33.3%	1,482	1,040	-29.8%
94	MKL	Jackson (US) TN	EAS	Tennessee	2	1	-1	104	78	-25.0%	936	624	-33.3%
27	SUX	Sioux City	EAS	Iowa	2	1	-1	70	57	-18.6%	4,644	2,850	-38.6%
71	MSL	Muscle Shoals	EAS	Alabama	1	1	0	52	104	100.0%	1,768	936	-47.1%
65	JHW	Jamestown (US) NY	EAS	New York	2	1	-1	109	104	-4.6%	2,071	1,040	-49.8%
99	WRL	Worland	EAS	Wyoming	1	1	0	62	62	0.0%	1,178	558	-52.6%
61	AOO	Altoona	EAS	Pennsylvania	2	1	-1	78	114	46.2%	2,652	1,140	-57.0%
86	FKL	Franklin	EAS	Pennsylvania	2	1	-1	104	83	-20.2%	1,976	830	-58.0%
105	HVR	Havre	EAS	Montana	1	1	0	62	25	-59.7%	558	225	-59.7%
59	TUP	Tupelo	EAS	Mississippi	2	2	0	104	130	25.0%	3,536	1,170	-66.9%
104	GBD	Great Bend	EAS	Kansas	2	1	-1	78	25	-67.9%	702	225	-67.9%
107	IGM	Kingman	EAS	Arizona	2	-	-2	62	-	-100.0%	558	-	-100.0%
108	CEC	Crescent City	EAS	California	2	-	-2	83	-	-100.0%	2,490	-	-100.0%
109	PUB	Pueblo	EAS	Colorado	1	-	-1	52	-	-100.0%	1,560	-	-100.0%
110	MCN	Macon	EAS	Georgia	2	-	-2	52	-	-100.0%	1,768	-	-100.0%
111	AIA	Alliance	EAS	Nebraska	1	-	-1	26	-	-100.0%	234	-	-100.0%
112	CDR	Chadron	EAS	Nebraska	1	-	-1	26	-	-100.0%	234	-	-100.0%
113	CNY	Moab	EAS	Utah	1	-	-1	54	-	-100.0%	1,620	-	-100.0%
114	VEL	Vernal	EAS	Utah	1	-	-1	52	-	-100.0%	1,560	-	-100.0%
<b>Average/Total</b>					<b>161</b>	<b>155</b>	<b>-6</b>	<b>8,954</b>	<b>8,889</b>	<b>-0.7%</b>	<b>217,375</b>	<b>213,680</b>	<b>-1.7%</b>



# **VIRGINIA COMMERCIAL AIR SERVICE STRATEGIC REVIEW**

## **State by State Summary 7\_15 Domestic**

## Domestic Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
BHM	Birmingham, AL	Small	Alabama	28	18	-10	2,470	1,659	-32.8%	223,853	150,736	-32.7%
HSV	Huntsville	Small	Alabama	12	9	-3	1,265	861	-31.9%	75,626	59,860	-20.8%
DHN	Dothan	Nonhub	Alabama	1	1	0	147	117	-20.4%	6,130	5,850	-4.6%
MGM	Montgomery	Nonhub	Alabama	4	3	-1	445	347	-22.0%	23,716	17,764	-25.1%
MOB	Mobile	Nonhub	Alabama	6	5	-1	709	563	-20.6%	39,307	32,064	-18.4%
MSL	Muscle Shoals	EAS	Alabama	2	1	-1	85	104	22.4%	2,890	936	-67.6%
<b>Average/Total - All Airports</b>			Alabama	<b>53</b>	<b>37</b>	<b>-16</b>	<b>5,121</b>	<b>3,651</b>	<b>-28.7%</b>	<b>371,522</b>	<b>267,210</b>	<b>-28.1%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Alabama	<b>53</b>	<b>37</b>	<b>-16</b>	<b>5,121</b>	<b>3,651</b>	<b>-28.7%</b>	<b>371,522</b>	<b>267,210</b>	<b>-28.1%</b>
ANC	Anchorage	Medium	Alaska	43	40	-3	4,856	4,148	-14.6%	391,702	382,406	-2.4%
FAI	Fairbanks	Small	Alaska	25	18	-7	1,312	1,331	1.4%	79,901	75,325	-5.7%
JNU	Juneau	Small	Alaska	15	14	-1	1,715	2,112	23.1%	78,858	88,073	11.7%
<b>Average/Total - All Airports</b>			Alaska	<b>83</b>	<b>72</b>	<b>-11</b>	<b>7,883</b>	<b>7,591</b>	<b>-3.7%</b>	<b>550,461</b>	<b>545,804</b>	<b>-0.8%</b>
<b>Average/Total - Small Hub ONLY</b>			Alaska	<b>40</b>	<b>32</b>	<b>-8</b>	<b>3,027</b>	<b>3,443</b>	<b>13.7%</b>	<b>158,759</b>	<b>163,398</b>	<b>2.9%</b>
PHX	Phoenix	Large	Arizona	91	78	-13	18,405	15,342	-16.6%	2,290,689	2,075,195	-9.4%
AZA	Phoenix Mesa	Small	Arizona	-	34	34	-	330	-	-	52,780	-
TUS	Tucson	Small	Arizona	22	13	-9	2,425	1,444	-40.5%	236,649	145,212	-38.6%
FLG	Flagstaff	Nonhub	Arizona	1	1	0	186	169	-9.1%	6,882	8,450	22.8%
GCN	Grand Canyon	Nonhub	Arizona	1	1	0	75	21	-72.0%	750	189	-74.8%
GCW	Grand Canyon	Nonhub	Arizona	-	1	1	-	31	-	-	186	-
IFP	Bullhead City	Nonhub	Arizona	15	-	-15	27	-	-100.0%	4,218	-	-100.0%
IGM	Kingman	EAS	Arizona	1	-	-1	81	-	-100.0%	1,539	-	-100.0%
PGA	Page	EAS	Arizona	2	3	1	120	114	-5.0%	2,280	1,026	-55.0%
PRC	Prescott	EAS	Arizona	2	1	-1	162	88	-45.7%	3,078	792	-74.3%
SOW	Show Low	EAS	Arizona	2	1	-1	120	52	-56.7%	2,280	468	-79.5%
YUM	Yuma	Nonhub	Arizona	4	1	-3	281	174	-38.1%	9,585	8,700	-9.2%
<b>Average/Total - All Airports</b>			Arizona	<b>141</b>	<b>134</b>	<b>-7</b>	<b>32,792</b>	<b>28,799</b>	<b>-12.2%</b>	<b>3,267,170</b>	<b>3,002,200</b>	<b>-8.1%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Arizona	<b>50</b>	<b>56</b>	<b>6</b>	<b>3,477</b>	<b>2,423</b>	<b>-30.3%</b>	<b>267,261</b>	<b>217,803</b>	<b>-18.5%</b>
LIT	Little Rock	Small	Arkansas	21	14	-7	1,974	1,290	-34.7%	157,317	111,872	-28.9%
XNA	Fayetteville, AR	Small	Arkansas	17	13	-4	1,423	1,118	-21.4%	81,952	73,655	-10.1%
ELD	El Dorado	EAS	Arkansas	2	2	0	108	104	-3.7%	2,052	936	-54.4%
FSM	Fort Smith	Nonhub	Arkansas	3	2	-1	336	170	-49.4%	15,178	8,362	-44.9%
HOT	Hot Springs	EAS	Arkansas	2	2	0	112	78	-30.4%	2,128	702	-67.0%
HRO	Harrison	EAS	Arkansas	2	2	0	79	99	25.3%	1,501	891	-40.6%
JBR	Jonesboro	EAS	Arkansas	1	1	0	54	78	44.4%	1,026	624	-39.2%
TXK	Texarkana	Nonhub	Arkansas	2	1	-1	151	91	-39.7%	5,630	4,550	-19.2%
<b>Average/Total - All Airports</b>			Arkansas	<b>50</b>	<b>37</b>	<b>-13</b>	<b>4,237</b>	<b>3,028</b>	<b>-28.5%</b>	<b>266,784</b>	<b>201,592</b>	<b>-24.4%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Arkansas	<b>50</b>	<b>37</b>	<b>-13</b>	<b>4,237</b>	<b>3,028</b>	<b>-28.5%</b>	<b>266,784</b>	<b>201,592</b>	<b>-24.4%</b>

## Domestic Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats			
				Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.	
LAX	Los Angeles	Large	California	89	99	10	22,264	21,621	-2.9%	2,582,371	2,954,869	14.4%	
SAN	San Diego	Large	California	50	50	0	9,023	7,364	-18.4%	1,080,486	1,055,091	-2.4%	
SFO	San Francisco	Large	California	66	71	5	12,909	15,090	16.9%	1,532,635	2,075,834	35.4%	
BUR	Burbank	Medium	California	13	14	1	3,044	2,105	-30.8%	372,983	235,854	-36.8%	
OAK	Oakland	Medium	California	36	41	5	6,886	4,390	-36.2%	915,020	627,362	-31.4%	
ONT	Ontario	Medium	California	32	13	-19	4,037	1,783	-55.8%	439,245	214,172	-51.2%	
SJC	San Jose	Medium	California	26	27	1	5,597	4,037	-27.9%	658,245	537,968	-18.3%	
SMF	Sacramento	Medium	California	34	29	-5	5,499	3,990	-27.4%	647,326	513,396	-20.7%	
SNA	Orange County	Medium	California	24	20	-4	4,588	3,614	-21.2%	582,142	511,180	-12.2%	
FAT	Fresno	Small	California	11	10	-1	1,525	875	-42.6%	77,434	63,199	-18.4%	
LGB	Long Beach	Small	California	11	12	1	1,241	1,071	-13.7%	162,514	140,650	-13.5%	
PSP	Palm Springs	Small	California	10	9	-1	901	510	-43.4%	48,763	39,599	-18.8%	
ACV	Arcata/Eureka	Nonhub	California	5	1	-4	453	123	-72.8%	17,868	6,750	-62.2%	
BFL	Bakersfield	Nonhub	California	6	4	-2	458	265	-42.1%	19,532	14,470	-25.9%	
CEC	Crescent City	EAS	California	2	-	-2	93	-	-100.0%	2,790	-	-100.0%	
CIC	Chico	Nonhub	California	1	-	-1	116	-	-100.0%	3,480	-	-100.0%	
CLD	San Diego	Nonhub	California	2	1	-1	236	62	-73.7%	7,297	1,984	-72.8%	
IPL	Imperial	EAS	California	2	2	0	108	104	-3.7%	3,240	936	-71.1%	
IYK	Inyokern	Nonhub	California	1	-	-1	85	-	-100.0%	2,550	-	-100.0%	
MCE	Merced	EAS	California	2	1	-1	139	57	-59.0%	2,641	513	-80.6%	
MMH	Mammoth Lakes	Nonhub	California	-	1	1	-	31	-	-	-	2,356	-
MOD	Modesto	Nonhub	California	2	-	-2	263	-	-100.0%	7,890	-	-100.0%	
MRY	Monterey	Nonhub	California	8	5	-3	811	392	-51.7%	31,720	22,846	-28.0%	
OXR	Oxnard/Ventura	Nonhub	California	1	-	-1	116	-	-100.0%	3,480	-	-100.0%	
PMD	Palmdale	Nonhub	California	1	-	-1	58	-	-100.0%	2,900	-	-100.0%	
RDD	Redding	Nonhub	California	4	1	-3	279	62	-77.8%	14,074	3,100	-78.0%	
SBA	Santa Barbara	Nonhub	California	10	6	-4	1,294	656	-49.3%	50,909	38,133	-25.1%	
SBP	San Luis Obispo	Nonhub	California	4	3	-1	624	259	-58.5%	22,310	14,279	-36.0%	
SCK	Sacramento	Nonhub	California	1	2	1	22	53	140.9%	3,300	8,728	164.5%	
SMX	Santa Maria	Nonhub	California	2	2	0	165	75	-54.5%	6,630	5,258	-20.7%	
STS	Santa Rosa	Nonhub	California	2	4	2	93	210	125.8%	7,068	15,960	125.8%	
VIS	Visalia	EAS	California	2	2	0	108	104	-3.7%	2,052	936	-54.4%	
<b>Average/Total - All Airports</b>			California	<b>460</b>	<b>430</b>	<b>-30</b>	<b>83,035</b>	<b>68,903</b>	<b>-17.0%</b>	<b>9,310,895</b>	<b>9,105,423</b>	<b>-2.2%</b>	
<b>Average/Total - Small, Nonhub and EAS</b>			California	<b>90</b>	<b>66</b>	<b>-24</b>	<b>9,188</b>	<b>4,909</b>	<b>-46.6%</b>	<b>500,442</b>	<b>379,697</b>	<b>-24.1%</b>	

## Domestic Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
DEN	Denver	Large	Colorado	138	145	7	25,438	22,307	-12.3%	2,630,746	2,625,442	-0.2%
COS	Colorado Springs	Small	Colorado	16	10	-6	1,703	773	-54.6%	121,996	64,829	-46.9%
ALS	Alamosa	EAS	Colorado	1	2	1	81	109	34.6%	1,539	981	-36.3%
ASE	Aspen	Nonhub	Colorado	4	5	1	586	407	-30.5%	32,035	28,313	-11.6%
CEZ	Cortez	EAS	Colorado	1	1	0	81	57	-29.6%	1,539	513	-66.7%
DRO	Durango	Nonhub	Colorado	3	3	0	333	379	13.8%	14,223	23,167	62.9%
EGE	Vail	Nonhub	Colorado	3	3	0	182	96	-47.3%	17,273	9,911	-42.6%
FNL	Fort Collins/Loveland	Nonhub	Colorado	1	-	-1	18	-	-100.0%	2,700	-	-100.0%
GJT	Grand Junction	Nonhub	Colorado	4	7	3	514	417	-18.9%	21,352	24,218	13.4%
GUC	Gunnison	Nonhub	Colorado	1	2	1	93	63	-32.3%	3,441	4,070	18.3%
HDN	Hayden	Nonhub	Colorado	2	2	0	186	93	-50.0%	7,688	5,931	-22.9%
MTJ	Montrose	Nonhub	Colorado	4	5	1	220	161	-26.8%	9,969	10,573	6.1%
PUB	Pueblo	EAS	Colorado	1	-	-1	54	-	-100.0%	1,026	-	-100.0%
TEX	Telluride	Nonhub	Colorado	1	-	-1	124	-	-100.0%	2,356	-	-100.0%
<b>Average/Total - All Airports</b>			Colorado	<b>180</b>	<b>185</b>	<b>5</b>	<b>29,613</b>	<b>24,862</b>	<b>-16.0%</b>	<b>2,867,883</b>	<b>2,797,948</b>	<b>-2.4%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Colorado	<b>42</b>	<b>40</b>	<b>-2</b>	<b>321</b>	<b>197</b>	<b>-38.8%</b>	<b>18,241</b>	<b>13,270</b>	<b>-27.3%</b>
BDL	Hartford	Medium	Connecticut	35	25	-10	3,624	2,606	-28.1%	366,853	284,921	-22.3%
BDR	Bridgeport	Nonhub	Connecticut	1	-	-1	23	-	-100.0%	184	-	-100.0%
HVN	New Haven	Nonhub	Connecticut	1	1	0	147	110	-25.2%	5,439	4,070	-25.2%
<b>Average/Total - All Airports</b>			Connecticut	<b>37</b>	<b>26</b>	<b>-11</b>	<b>3,794</b>	<b>2,716</b>	<b>-28.4%</b>	<b>372,476</b>	<b>288,991</b>	<b>-22.4%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Connecticut	<b>2</b>	<b>1</b>	<b>-1</b>	<b>170</b>	<b>110</b>	<b>-35.3%</b>	<b>5,623</b>	<b>4,070</b>	<b>-27.6%</b>
ILG	Wilmington, DE	Nonhub	Delaware	1	-	-1	54	-	-100.0%	2,700	-	-100.0%

## Domestic Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats			
				Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.	
FLL	Fort Lauderdale	Large	Florida	55	66	11	7,154	6,732	-5.9%	970,416	968,973	-0.1%	
MCO	Orlando	Large	Florida	87	76	-11	13,510	10,260	-24.1%	1,825,191	1,547,786	-15.2%	
MIA	Miami	Large	Florida	47	56	9	6,671	7,321	9.7%	870,660	1,043,967	19.9%	
TPA	Tampa	Large	Florida	65	64	-1	8,048	6,009	-25.3%	986,751	825,638	-16.3%	
JAX	Jacksonville, FL	Medium	Florida	33	26	-7	3,716	2,666	-28.3%	373,444	278,867	-25.3%	
PBI	West Palm Beach	Medium	Florida	21	18	-3	2,252	1,759	-21.9%	287,003	239,650	-16.5%	
RSW	Fort Myers	Medium	Florida	28	30	2	2,369	1,786	-24.6%	290,709	247,338	-14.9%	
ECP	Panama City, FL	Small	Florida	-	11	11	-	557	-	-	-	56,541	-
PIE	Tampa	Small	Florida	21	42	21	251	449	78.9%	39,738	76,679	93.0%	
PNS	Pensacola	Small	Florida	9	13	4	1,368	987	-27.9%	96,346	86,981	-9.7%	
SFB	Orlando Sanford	Small	Florida	24	56	32	253	597	136.0%	37,950	101,522	167.5%	
SRQ	Sarasota	Small	Florida	10	6	-4	630	420	-33.3%	62,720	46,422	-26.0%	
APF	Naples (US)	Nonhub	Florida	2	1	-1	123	17	-86.2%	3,006	170	-94.3%	
DAB	Daytona Beach	Nonhub	Florida	2	2	0	244	234	-4.1%	27,571	26,843	-2.6%	
DSI	Destin, FL	Nonhub	Florida	-	4	4	-	59	-	-	-	590	-
EYW	Key West	Nonhub	Florida	7	6	-1	1,047	597	-43.0%	34,155	34,388	0.7%	
GNV	Gainesville	Nonhub	Florida	4	4	0	377	436	15.6%	18,873	21,686	14.9%	
MLB	Melbourne, FL	Nonhub	Florida	2	2	0	172	220	27.9%	14,812	20,593	39.0%	
MTH	Marathon, FL	Nonhub	Florida	1	-	-1	26	-	-100.0%	1,300	-	-100.0%	
PFN	Panama City, FL	Nonhub	Florida	4	-	-4	368	-	-100.0%	21,384	-	-100.0%	
PGD	Punta Gorda, FL	Nonhub	Florida	-	22	22	-	225	-	-	-	37,493	-
TLH	Tallahassee	Nonhub	Florida	9	7	-2	1,074	590	-45.1%	54,097	39,035	-27.8%	
UST	St. Augustine, FL	Nonhub	Florida	1	2	1	7	22	214.3%	1,092	2,064	89.0%	
VPS	Fort Walton Beach	Nonhub	Florida	7	5	-2	757	587	-22.5%	46,441	42,205	-9.1%	
<b>Average/Total - All Airports</b>			Florida	<b>439</b>	<b>519</b>	<b>80</b>	<b>50,417</b>	<b>42,530</b>	-15.6%	<b>6,063,659</b>	<b>5,745,431</b>	-5.2%	
<b>Average/Total - Small, Nonhub and EAS</b>			Florida	<b>103</b>	<b>183</b>	<b>80</b>	<b>6,697</b>	<b>5,997</b>	-10.5%	<b>459,485</b>	<b>593,212</b>	29.1%	
ATL	Atlanta	Large	Georgia	177	158	-19	39,707	34,527	-13.0%	4,408,203	4,554,111	3.3%	
SAV	Savannah	Small	Georgia	16	17	1	1,487	1,299	-12.6%	119,262	107,791	-9.6%	
ABY	Albany, GA	Nonhub	Georgia	1	1	0	120	80	-33.3%	4,800	4,000	-16.7%	
AGS	Augusta, GA	Nonhub	Georgia	2	2	0	379	424	11.9%	17,399	26,411	51.8%	
AHN	Athens (US)	Nonhub	Georgia	1	-	-1	58	-	-100.0%	1,102	-	-100.0%	
BQK	Brunswick	Nonhub	Georgia	1	1	0	93	80	-14.0%	4,020	4,000	-0.5%	
CSG	Columbus, GA	Nonhub	Georgia	1	1	0	119	102	-14.3%	5,740	5,100	-11.1%	
MCN	Macon	EAS	Georgia	1	-	-1	93	-	-100.0%	4,892	-	-100.0%	
PDK	Atlanta	Nonhub	Georgia	-	3	3	-	43	-	-	-	430	-
VLD	Valdosta	Nonhub	Georgia	1	1	0	89	87	-2.2%	4,310	4,350	0.9%	
<b>Average/Total - All Airports</b>			Georgia	<b>201</b>	<b>184</b>	<b>-17</b>	<b>42,145</b>	<b>36,642</b>	-13.1%	<b>4,569,728</b>	<b>4,706,193</b>	3.0%	
<b>Average/Total - Small, Nonhub and EAS</b>			Georgia	<b>24</b>	<b>26</b>	<b>2</b>	<b>2,438</b>	<b>2,115</b>	-13.2%	<b>161,525</b>	<b>152,082</b>	-5.8%	

## Domestic Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
HNL	Honolulu	Large	Hawaii	32	30	-2	7,644	5,452	-28.7%	939,191	782,008	-16.7%
OGG	Kahului	Medium	Hawaii	21	21	0	3,537	3,293	-6.9%	364,355	355,972	-2.3%
ITO	Hilo	Small	Hawaii	4	3	-1	1,003	619	-38.3%	97,096	74,207	-23.6%
KOA	Kona	Small	Hawaii	13	11	-2	1,981	1,638	-17.3%	195,147	175,657	-10.0%
LIH	Kauai Island	Small	Hawaii	6	9	3	1,468	1,062	-27.7%	173,063	153,346	-11.4%
<b>Average/Total - All Airports</b>			Hawaii	<b>76</b>	<b>74</b>	<b>-2</b>	<b>15,633</b>	<b>12,064</b>	<b>-22.8%</b>	<b>1,768,852</b>	<b>1,541,190</b>	<b>-12.9%</b>
<b>Average/Total - Small Hub ONLY</b>			Hawaii	<b>23</b>	<b>23</b>	<b>0</b>	<b>4,452</b>	<b>3,319</b>	<b>-25.4%</b>	<b>465,306</b>	<b>403,210</b>	<b>-13.3%</b>
BOI	Boise	Small	Idaho	24	18	-6	2,606	1,853	-28.9%	229,804	172,568	-24.9%
SUN	Sun Valley	Nonhub	Idaho	3	5	2	403	190	-52.9%	14,942	13,322	-10.8%
IDA	Idaho Falls	Nonhub	Idaho	6	7	1	397	292	-26.4%	23,168	20,368	-12.1%
LWS	Lewiston	Nonhub	Idaho	4	4	0	271	153	-43.5%	10,833	10,068	-7.1%
MYL	McCall, ID	Nonhub	Idaho	2	-	-2	74	-	-100.0%	592	-	-100.0%
PIH	Pocatello	Nonhub	Idaho	1	1	0	155	70	-54.8%	4,650	3,500	-24.7%
SMN	Salmon, ID	Nonhub	Idaho	2	-	-2	74	-	-100.0%	592	-	-100.0%
TWF	Twin Falls	Nonhub	Idaho	1	1	0	182	88	-51.6%	5,460	4,400	-19.4%
<b>Average/Total - All Airports</b>			Idaho	<b>43</b>	<b>36</b>	<b>-7</b>	<b>4,162</b>	<b>2,646</b>	<b>-36.4%</b>	<b>290,041</b>	<b>224,226</b>	<b>-22.7%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Idaho	<b>43</b>	<b>36</b>	<b>-7</b>	<b>4,162</b>	<b>2,646</b>	<b>-36.4%</b>	<b>290,041</b>	<b>224,226</b>	<b>-22.7%</b>
MDW	Chicago Midway	Large	Illinois	61	71	10	9,189	8,202	-10.7%	1,186,953	1,183,296	-0.3%
ORD	Chicago O'Hare	Large	Illinois	142	161	19	35,846	34,229	-4.5%	3,479,130	3,347,666	-3.8%
DEC	Decatur	EAS	Illinois	2	2	0	108	156	44.4%	2,052	1,248	-39.2%
BLV	Belleville	Nonhub	Illinois	2	2	0	19	14	-26.3%	2,850	2,335	-18.1%
BMI	Bloomington	Nonhub	Illinois	5	7	2	530	295	-44.3%	33,106	20,112	-39.2%
CMI	Champaign	Nonhub	Illinois	4	2	-2	311	195	-37.3%	15,058	9,738	-35.3%
MLI	Moline	Nonhub	Illinois	10	10	0	999	639	-36.0%	58,756	39,733	-32.4%
MWA	Marion	EAS	Illinois	1	1	0	54	156	188.9%	1,026	1,404	36.8%
PIA	Peoria	Nonhub	Illinois	7	11	4	590	578	-2.0%	31,546	34,705	10.0%
PWK	Chicago	Nonhub	Illinois	2	-	-2	18	-	-100.0%	180	-	-100.0%
RFD	Chicago	Nonhub	Illinois	4	5	1	102	45	-55.9%	9,500	7,391	-22.2%
SPI	Springfield	Nonhub	Illinois	3	4	1	157	163	3.8%	8,350	9,310	11.5%
UIN	Quincy	EAS	Illinois	2	1	-1	81	159	96.3%	1,539	1,431	-7.0%
<b>Average/Total - All Airports</b>			Illinois	<b>245</b>	<b>277</b>	<b>32</b>	<b>48,004</b>	<b>44,831</b>	<b>-6.6%</b>	<b>4,830,046</b>	<b>4,658,369</b>	<b>-3.6%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Illinois	<b>42</b>	<b>45</b>	<b>3</b>	<b>2,969</b>	<b>2,400</b>	<b>-19.2%</b>	<b>163,963</b>	<b>127,407</b>	<b>-22.3%</b>

## Domestic Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
IND	Indianapolis	Medium	Indiana	37	37	0	5,247	4,217	-19.6%	464,365	434,705	-6.4%
EVV	Evansville	Nonhub	Indiana	6	5	-1	666	502	-24.6%	31,415	28,174	-10.3%
FWA	Fort Wayne	Nonhub	Indiana	9	12	3	881	657	-25.4%	40,980	38,363	-6.4%
SBN	South Bend	Nonhub	Indiana	9	10	1	856	505	-41.0%	43,812	31,918	-27.1%
<b>Average/Total - All Airports</b>			Indiana	<b>61</b>	<b>64</b>	<b>3</b>	<b>7,650</b>	<b>5,881</b>	-23.1%	<b>580,572</b>	<b>533,160</b>	-8.2%
<b>Average/Total - Small, Nonhub and EAS</b>			Indiana	<b>24</b>	<b>27</b>	<b>3</b>	<b>2,403</b>	<b>1,664</b>	-30.8%	<b>116,207</b>	<b>98,455</b>	-15.3%
CID	Cedar Rapids	Small	Iowa	10	12	2	1,212	945	-22.0%	65,902	58,700	-10.9%
DSM	Des Moines	Small	Iowa	18	18	0	1,941	1,361	-29.9%	111,934	118,000	5.4%
ALO	Waterloo	EAS	Iowa	1	1	0	119	57	-52.1%	4,526	2,850	-37.0%
BRL	Burlington (US) IA	EAS	Iowa	-	2	2	-	109	-	-	872	-
DBQ	Dubuque	Nonhub	Iowa	1	1	0	124	88	-29.0%	5,828	4,400	-24.5%
FOD	Fort Dodge	EAS	Iowa	1	2	1	81	125	54.3%	2,754	1,000	-63.7%
MCW	Mason City	EAS	Iowa	2	2	0	162	125	-22.8%	5,508	1,000	-81.8%
SUX	Sioux City	EAS	Iowa	1	1	0	154	57	-63.0%	6,212	2,850	-54.1%
<b>Average/Total - All Airports</b>			Iowa	<b>34</b>	<b>39</b>	<b>5</b>	<b>3,793</b>	<b>2,867</b>	-24.4%	<b>202,664</b>	<b>189,672</b>	-6.4%
<b>Average/Total - Small, Nonhub and EAS</b>			Iowa	<b>34</b>	<b>39</b>	<b>5</b>	<b>3,793</b>	<b>2,867</b>	-24.4%	<b>202,664</b>	<b>189,672</b>	-6.4%
ICT	Wichita	Small	Kansas	12	11	-1	1,389	1,065	-23.3%	100,017	91,098	-8.9%
DDC	Dodge City	EAS	Kansas	4	2	-2	170	83	-51.2%	3,230	1,188	-63.2%
FOE	Topeka	Nonhub	Kansas	1	-	-1	3	-	-100.0%	450	-	-100.0%
GBD	Great Bend	EAS	Kansas	2	1	-1	54	25	-53.7%	1,026	225	-78.1%
GCK	Garden City	EAS	Kansas	3	1	-2	139	62	-55.4%	2,641	3,100	17.4%
HYS	Hays	EAS	Kansas	3	1	-2	112	52	-53.6%	2,128	2,600	22.2%
LBL	Liberal	EAS	Kansas	2	1	-1	85	83	-2.4%	1,615	1,293	-19.9%
MHK	Manhattan	Nonhub	Kansas	1	2	1	81	155	91.4%	1,539	7,564	391.5%
SLN	Salina	EAS	Kansas	1	1	0	54	78	44.4%	1,026	702	-31.6%
<b>Average/Total - All Airports</b>			Kansas	<b>29</b>	<b>20</b>	<b>-9</b>	<b>2,087</b>	<b>1,603</b>	-23.2%	<b>113,672</b>	<b>107,770</b>	-5.2%
<b>Average/Total - Small, Nonhub and EAS</b>			Kansas	<b>29</b>	<b>20</b>	<b>-9</b>	<b>2,087</b>	<b>1,603</b>	-23.2%	<b>113,672</b>	<b>107,770</b>	-5.2%
LEX	Lexington	Small	Kentucky	13	15	2	1,278	1,052	-17.7%	63,590	68,476	7.7%
SDF	Louisville	Small	Kentucky	28	20	-8	3,203	2,178	-32.0%	242,571	186,960	-22.9%
OWB	Owensboro	EAS	Kentucky	-	2	2	-	92	-	-	2,712	-
PAH	Paducah	EAS	Kentucky	1	1	0	93	62	-33.3%	3,162	3,100	-2.0%
<b>Average/Total - All Airports</b>			Kentucky	<b>42</b>	<b>38</b>	<b>-4</b>	<b>4,574</b>	<b>3,384</b>	-26.0%	<b>309,323</b>	<b>261,248</b>	-15.5%
<b>Average/Total - Small, Nonhub and EAS</b>			Kentucky	<b>42</b>	<b>38</b>	<b>-4</b>	<b>4,574</b>	<b>3,384</b>	-26.0%	<b>309,323</b>	<b>261,248</b>	-15.5%

## Domestic Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats			
				Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.	
MSY	New Orleans	Medium	Louisiana	37	38	1	3,722	4,117	10.6%	430,459	525,673	22.1%	
AEX	Alexandria, LA	Nonhub	Louisiana	4	3	-1	471	295	-37.4%	18,452	14,750	-20.1%	
BTR	Baton Rouge	Nonhub	Louisiana	9	4	-5	1,057	730	-30.9%	55,628	40,942	-26.4%	
LCH	Lake Charles	Nonhub	Louisiana	1	2	1	178	198	11.2%	6,332	9,887	56.1%	
LFT	Lafayette	Nonhub	Louisiana	4	4	0	612	519	-15.2%	25,946	28,756	10.8%	
MLU	Monroe	Nonhub	Louisiana	4	3	-1	441	286	-35.1%	15,869	14,300	-9.9%	
NEW	New Orleans, LA	Nonhub	Louisiana	-	2	2	-	27	-	-	-	270	-
SHV	Shreveport	Nonhub	Louisiana	8	6	-2	880	602	-31.6%	39,753	34,535	-13.1%	
<b>Average/Total - All Airports</b>			Louisiana	<b>67</b>	<b>62</b>	<b>-5</b>	<b>7,361</b>	<b>6,774</b>	<b>-8.0%</b>	<b>592,439</b>	<b>669,113</b>	<b>12.9%</b>	
<b>Average/Total - Small, Nonhub and EAS</b>			Louisiana	<b>30</b>	<b>24</b>	<b>-6</b>	<b>3,639</b>	<b>2,657</b>	<b>-27.0%</b>	<b>161,980</b>	<b>143,440</b>	<b>-11.4%</b>	
PWM	Portland, ME	Small	Maine	16	12	-4	1,599	1,367	-14.5%	112,234	114,875	2.4%	
AUG	Augusta (US) ME	EAS	Maine	2	1	-1	108	124	14.8%	2,052	1,116	-45.6%	
BGR	Bangor	Nonhub	Maine	8	7	-1	644	498	-22.7%	29,389	35,380	20.4%	
BHB	Bar Harbor	EAS	Maine	2	1	-1	167	93	-44.3%	3,173	2,387	-24.8%	
PQI	Presque Isle	EAS	Maine	1	1	0	89	83	-6.7%	3,026	2,822	-6.7%	
RKD	Rockland	EAS	Maine	2	1	-1	151	186	23.2%	2,869	1,674	-41.7%	
<b>Average/Total - All Airports</b>			Maine	<b>31</b>	<b>23</b>	<b>-8</b>	<b>2,758</b>	<b>2,351</b>	<b>-14.8%</b>	<b>152,743</b>	<b>158,254</b>	<b>3.6%</b>	
<b>Average/Total - Small, Nonhub and EAS</b>			Maine	<b>31</b>	<b>23</b>	<b>-8</b>	<b>2,758</b>	<b>2,351</b>	<b>-14.8%</b>	<b>152,743</b>	<b>158,254</b>	<b>3.6%</b>	
BWI	Baltimore	Large	Maryland	62	67	5	10,338	8,975	-13.2%	1,301,431	1,261,511	-3.1%	
HGR	Hagerstown	EAS	Maryland	1	3	2	54	118	118.5%	1,026	3,408	232.2%	
SBY	Salisbury	Nonhub	Maryland	2	2	0	248	179	-27.8%	9,917	7,429	-25.1%	
<b>Average/Total - All Airports</b>			Maryland	<b>65</b>	<b>72</b>	<b>7</b>	<b>10,640</b>	<b>9,272</b>	<b>-12.9%</b>	<b>1,312,374</b>	<b>1,272,348</b>	<b>-3.0%</b>	
<b>Average/Total - Small, Nonhub and EAS</b>			Maryland	<b>3</b>	<b>5</b>	<b>2</b>	<b>302</b>	<b>297</b>	<b>-1.7%</b>	<b>10,943</b>	<b>10,837</b>	<b>-1.0%</b>	
BOS	Boston	Large	Massachusetts	77	74	-3	14,591	14,579	-0.1%	1,405,940	1,576,015	12.1%	
ACK	Nantucket	Nonhub	Massachusetts	9	9	0	2,648	2,179	-17.7%	40,378	38,869	-3.7%	
BED	Bedford/Hanscom	Nonhub	Massachusetts	3	-	-3	175	-	-100.0%	3,325	-	-100.0%	
CEF	Springfield, MA	Nonhub	Massachusetts	1	-	-1	7	-	-100.0%	1,092	-	-100.0%	
EWB	New Bedford	Nonhub	Massachusetts	2	2	0	368	279	-24.2%	3,312	2,511	-24.2%	
HYA	Hyannis	Nonhub	Massachusetts	4	5	1	1,480	854	-42.3%	16,325	10,856	-33.5%	
MVY	Martha's Vineyard	Nonhub	Massachusetts	7	9	2	1,283	862	-32.8%	18,233	17,049	-6.5%	
ORH	Worcester	Nonhub	Massachusetts	-	2	2	-	62	-	-	-	6,200	-
PVC	Provincetown	Nonhub	Massachusetts	1	2	1	417	367	-12.0%	3,753	3,303	-12.0%	
<b>Average/Total - All Airports</b>			Massachusetts	<b>104</b>	<b>103</b>	<b>-1</b>	<b>20,969</b>	<b>19,182</b>	<b>-8.5%</b>	<b>1,492,358</b>	<b>1,654,803</b>	<b>10.9%</b>	
<b>Average/Total - Small, Nonhub and EAS</b>			Massachusetts	<b>27</b>	<b>29</b>	<b>2</b>	<b>6,378</b>	<b>4,603</b>	<b>-27.8%</b>	<b>86,418</b>	<b>78,788</b>	<b>-8.8%</b>	

## Domestic Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
DTW	Detroit	Large	Michigan	127	109	-18	17,938	15,249	-15.0%	1,759,744	1,602,854	-8.9%
FNT	Flint	Small	Michigan	9	7	-2	862	466	-45.9%	59,432	43,265	-27.2%
GRR	Grand Rapids	Small	Michigan	15	21	6	1,729	1,533	-11.3%	113,130	135,394	19.7%
APN	Alpena	EAS	Michigan	2	1	-1	93	52	-44.1%	3,162	2,600	-17.8%
AZO	Kalamazoo	Nonhub	Michigan	5	3	-2	571	284	-50.3%	28,469	16,374	-42.5%
CIU	Sault Ste Marie (US)	EAS	Michigan	2	1	-1	62	62	0.0%	2,108	3,100	47.1%
CMX	Hancock	EAS	Michigan	1	1	0	93	62	-33.3%	3,658	3,100	-15.3%
ESC	Escanaba	EAS	Michigan	2	1	-1	85	52	-38.8%	1,615	2,600	61.0%
IMT	Iron Mountain	EAS	Michigan	2	2	0	116	57	-50.9%	2,204	2,850	29.3%
IWD	Ironwood	EAS	Michigan	2	1	-1	62	78	25.8%	1,178	624	-47.0%
LAN	Lansing	Nonhub	Michigan	8	4	-4	475	347	-26.9%	31,999	22,760	-28.9%
MBL	Manistee	EAS	Michigan	2	2	0	58	51	-12.1%	1,102	1,530	38.8%
MBS	Saginaw	Nonhub	Michigan	3	3	0	339	280	-17.4%	24,100	15,144	-37.2%
MKG	Muskegon	EAS	Michigan	3	1	-2	205	62	-69.8%	5,290	3,100	-41.4%
MQT	Marquette	Nonhub	Michigan	7	2	-5	387	85	-78.0%	13,274	4,250	-68.0%
PLN	Pellston	EAS	Michigan	2	2	0	125	103	-17.6%	5,850	4,976	-14.9%
TVC	Traverse City	Nonhub	Michigan	6	7	1	549	590	7.5%	32,976	41,735	26.6%
<b>Average/Total - All Airports</b>			Michigan	<b>198</b>	<b>168</b>	<b>-30</b>	<b>23,749</b>	<b>19,413</b>	<b>-18.3%</b>	<b>2,089,291</b>	<b>1,906,256</b>	<b>-8.8%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Michigan	<b>71</b>	<b>59</b>	<b>-12</b>	<b>5,811</b>	<b>4,164</b>	<b>-28.3%</b>	<b>329,547</b>	<b>303,402</b>	<b>-7.9%</b>
MSP	Minneapolis/St. Paul	Large	Minnesota	132	120	-12	16,990	15,899	-6.4%	1,799,397	1,842,497	2.4%
BJI	Bemidji	EAS	Minnesota	2	1	-1	136	62	-54.4%	4,575	3,100	-32.2%
BRD	Brainerd	EAS	Minnesota	3	1	-2	178	60	-66.3%	6,052	3,000	-50.4%
DLH	Duluth	Nonhub	Minnesota	5	2	-3	318	263	-17.3%	22,658	17,326	-23.5%
HIB	Hibbing/Chisholm	EAS	Minnesota	3	2	-1	117	82	-29.9%	3,978	4,100	3.1%
INL	International Falls	EAS	Minnesota	2	2	0	90	54	-40.0%	3,844	2,700	-29.8%
RST	Rochester, MN	Nonhub	Minnesota	4	3	-1	445	235	-47.2%	25,073	13,092	-47.8%
STC	St Cloud	Nonhub	Minnesota	1	1	0	147	7	-95.2%	4,998	1,092	-78.2%
TVF	Thief River Falls	EAS	Minnesota	2	1	-1	54	62	14.8%	1,836	558	-69.6%
<b>Average/Total - All Airports</b>			Minnesota	<b>154</b>	<b>133</b>	<b>-21</b>	<b>18,475</b>	<b>16,724</b>	<b>-9.5%</b>	<b>1,872,411</b>	<b>1,887,465</b>	<b>0.8%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Minnesota	<b>22</b>	<b>13</b>	<b>-9</b>	<b>1,485</b>	<b>825</b>	<b>-44.4%</b>	<b>73,014</b>	<b>44,968</b>	<b>-38.4%</b>

## Domestic Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
JAN	Jackson, MS	Small	Mississippi	13	6	-7	1,259	836	-33.6%	94,054	57,241	-39.1%
DXE	Madison, MS	Nonhub	Mississippi	-	3	3	-	36	-	-	360	-
GLH	Greenville (US) MS	Nonhub	Mississippi	1	1	0	62	78	25.8%	2,108	702	-66.7%
GPT	Gulfport/Biloxi	Nonhub	Mississippi	8	5	-3	758	385	-49.2%	51,692	26,684	-48.4%
GTR	Columbus	Nonhub	Mississippi	1	1	0	88	88	0.0%	3,520	4,400	25.0%
MEI	Meridian	EAS	Mississippi	1	2	1	61	83	36.1%	2,740	4,150	51.5%
OLV	Olive Branch, MS	Nonhub	Mississippi	-	4	4	-	32	-	-	320	-
PIB	Laurel	EAS	Mississippi	1	2	1	62	52	-16.1%	2,108	2,600	23.3%
TUP	Tupelo	EAS	Mississippi	3	2	-1	202	130	-35.6%	7,150	1,170	-83.6%
<b>Average/Total - All Airports</b>			<b>Mississippi</b>	<b>28</b>	<b>26</b>	<b>-2</b>	<b>2,492</b>	<b>1,720</b>	<b>-31.0%</b>	<b>163,372</b>	<b>97,627</b>	<b>-40.2%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>Mississippi</b>	<b>28</b>	<b>26</b>	<b>-2</b>	<b>2,492</b>	<b>1,720</b>	<b>-31.0%</b>	<b>163,372</b>	<b>97,627</b>	<b>-40.2%</b>
MCI	Kansas City	Medium	Missouri	65	42	-23	8,025	4,735	-41.0%	759,191	569,313	-25.0%
STL	St. Louis	Medium	Missouri	64	58	-6	9,854	7,017	-28.8%	917,809	701,042	-23.6%
SGF	Springfield, MO	Small	Missouri	12	10	-2	1,037	727	-29.9%	56,477	49,647	-12.1%
BKG	Branson	Nonhub	Missouri	-	6	6	-	60	-	-	5,340	-
CGI	Cape Girardeau	EAS	Missouri	-	1	1	-	104	-	-	936	-
COU	Columbia, MO	Nonhub	Missouri	1	2	1	108	122	13.0%	2,052	6,880	235.3%
IRK	Kirksville	EAS	Missouri	2	1	-1	108	93	-13.9%	2,052	837	-59.2%
JLN	Joplin	EAS	Missouri	1	1	0	108	62	-42.6%	2,052	3,100	51.1%
TBN	Fort Leonard Wood	EAS	Missouri	-	1	1	-	128	-	-	1,152	-
<b>Average/Total - All Airports</b>			<b>Missouri</b>	<b>145</b>	<b>122</b>	<b>-23</b>	<b>19,240</b>	<b>13,048</b>	<b>-32.2%</b>	<b>1,739,633</b>	<b>1,338,247</b>	<b>-23.1%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>Missouri</b>	<b>145</b>	<b>122</b>	<b>-23</b>	<b>19,240</b>	<b>13,048</b>	<b>-32.2%</b>	<b>1,739,633</b>	<b>1,338,247</b>	<b>-23.1%</b>
BIL	Billings	Small	Montana	16	14	-2	1,013	875	-13.6%	59,848	51,507	-13.9%
BZN	Bozeman	Small	Montana	11	14	3	750	689	-8.1%	52,254	68,404	30.9%
BTM	Butte	EAS	Montana	2	1	-1	141	62	-56.0%	8,662	3,100	-64.2%
FCA	Kalispell	Nonhub	Montana	6	10	4	509	502	-1.4%	33,322	42,642	28.0%
GDV	Glendive	EAS	Montana	2	1	-1	85	62	-27.1%	1,615	558	-65.4%
GGW	Glasgow (US)	EAS	Montana	1	1	0	54	62	14.8%	1,026	558	-45.6%
GTF	Great Falls	Nonhub	Montana	6	7	1	335	337	0.6%	23,126	22,642	-2.1%
HLN	Helena	Nonhub	Montana	6	5	-1	292	199	-31.8%	14,290	12,179	-14.8%
HVR	Havre	EAS	Montana	1	1	0	54	25	-53.7%	1,026	225	-78.1%
LWT	Lewistown, MT	Nonhub	Montana	2	-	-2	108	-	-100.0%	2,052	-	-100.0%
MLS	Miles City, MT	Nonhub	Montana	2	-	-2	108	-	-100.0%	2,052	-	-100.0%
MSO	Missoula	Nonhub	Montana	10	12	2	636	515	-19.0%	37,924	42,774	12.8%
OLF	Wolf Point	EAS	Montana	2	1	-1	85	62	-27.1%	1,615	558	-65.4%
SDY	Sidney	EAS	Montana	2	1	-1	108	155	43.5%	2,052	1,395	-32.0%
WYS	West Yellowstone	EAS	Montana	1	1	0	70	54	-22.9%	2,100	2,700	28.6%
<b>Average/Total - All Airports</b>			<b>Montana</b>	<b>70</b>	<b>69</b>	<b>-1</b>	<b>4,348</b>	<b>3,599</b>	<b>-17.2%</b>	<b>242,964</b>	<b>249,242</b>	<b>2.6%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>Montana</b>	<b>70</b>	<b>69</b>	<b>-1</b>	<b>4,348</b>	<b>3,599</b>	<b>-17.2%</b>	<b>242,964</b>	<b>249,242</b>	<b>2.6%</b>

## Domestic Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
OMA	Omaha	Medium	Nebraska	23	22	-1	2,884	2,045	-29.1%	254,823	214,275	-15.9%
AIA	Alliance	EAS	Nebraska	2	-	-2	85	-	-100.0%	1,615	-	-100.0%
BFF	Scottsbluff	EAS	Nebraska	1	2	1	89	93	4.5%	1,691	2,790	65.0%
CDR	Chadron	EAS	Nebraska	1	-	-1	54	-	-100.0%	1,026	-	-100.0%
EAR	Kearney	EAS	Nebraska	1	1	0	85	62	-27.1%	2,550	1,860	-27.1%
GRI	Grand Island	EAS	Nebraska	3	3	0	135	75	-44.4%	2,565	5,768	124.9%
LBF	North Platte	EAS	Nebraska	1	1	0	89	62	-30.3%	1,691	1,860	10.0%
LNK	Lincoln	Nonhub	Nebraska	5	4	-1	373	322	-13.7%	20,180	16,999	-15.8%
MCK	Mccook	EAS	Nebraska	1	1	0	54	21	-61.1%	1,026	189	-81.6%
<b>Average/Total - All Airports</b>			<b>Nebraska</b>	<b>38</b>	<b>34</b>	<b>-4</b>	<b>3,848</b>	<b>2,680</b>	<b>-30.4%</b>	<b>287,167</b>	<b>243,741</b>	<b>-15.1%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>Nebraska</b>	<b>15</b>	<b>12</b>	<b>-3</b>	<b>964</b>	<b>635</b>	<b>-34.1%</b>	<b>32,344</b>	<b>29,466</b>	<b>-8.9%</b>
LAS	Las Vegas	Large	Nevada	133	113	-20	16,936	13,562	-19.9%	2,336,829	2,095,890	-10.3%
RNO	Reno	Small	Nevada	19	16	-3	2,644	1,702	-35.6%	320,211	199,469	-37.7%
BLD	Las Vegas	Nonhub	Nevada	1	1	0	75	31	-58.7%	750	186	-75.2%
EKO	Elko	Nonhub	Nevada	1	1	0	170	30	-82.4%	5,100	1,500	-70.6%
ELY	Ely, NV	Nonhub	Nevada	1	-	-1	27	-	-100.0%	513	-	-100.0%
<b>Average/Total - All Airports</b>			<b>Nevada</b>	<b>155</b>	<b>131</b>	<b>-24</b>	<b>19,852</b>	<b>15,325</b>	<b>-22.8%</b>	<b>2,663,403</b>	<b>2,297,045</b>	<b>-13.8%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>Nevada</b>	<b>22</b>	<b>18</b>	<b>-4</b>	<b>2,916</b>	<b>1,763</b>	<b>-39.5%</b>	<b>326,574</b>	<b>201,155</b>	<b>-38.4%</b>
MHT	Manchester, NH	Small	New Hampshire	19	13	-6	2,423	1,178	-51.4%	237,272	113,670	-52.1%
LEB	Lebanon	EAS	New Hampshire	1	2	1	89	186	109.0%	1,691	1,674	-1.0%
PSM	Portsmouth, NH	Nonhub	New Hampshire	2	1	-1	36	5	-86.1%	2,465	830	-66.3%
<b>Average/Total - All Airports</b>			<b>New Hampshire</b>	<b>22</b>	<b>16</b>	<b>-6</b>	<b>2,548</b>	<b>1,369</b>	<b>-46.3%</b>	<b>241,428</b>	<b>116,174</b>	<b>-51.9%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>New Hampshire</b>	<b>22</b>	<b>16</b>	<b>-6</b>	<b>2,548</b>	<b>1,369</b>	<b>-46.3%</b>	<b>241,428</b>	<b>116,174</b>	<b>-51.9%</b>
EWR	New York Newark	Large	New Jersey	89	83	-6	14,258	13,052	-8.5%	1,438,476	1,362,644	-5.3%
ACY	Atlantic City	Small	New Jersey	8	11	3	376	396	5.3%	49,770	60,996	22.6%
MMU	Morristown	Nonhub	New Jersey	-	2	2	-	34	-	-	1,020	-
TTN	Philadelphia	Nonhub	New Jersey	2	11	9	192	279	45.3%	6,035	38,502	538.0%
<b>Average/Total - All Airports</b>			<b>New Jersey</b>	<b>99</b>	<b>107</b>	<b>8</b>	<b>14,826</b>	<b>13,761</b>	<b>-7.2%</b>	<b>1,494,281</b>	<b>1,463,162</b>	<b>-2.1%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>New Jersey</b>	<b>10</b>	<b>24</b>	<b>14</b>	<b>568</b>	<b>709</b>	<b>24.8%</b>	<b>55,805</b>	<b>100,518</b>	<b>80.1%</b>

## Domestic Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
ABQ	Albuquerque	Medium	New Mexico	44	25	-19	4,279	2,381	-44.4%	456,563	272,685	-40.3%
ALM	Alamogordo, NM	Nonhub	New Mexico	2	-	-2	54	-	-100.0%	1,026	-	-100.0%
CNM	Carlsbad	EAS	New Mexico	-	2	2	-	52	-	-	468	-
CVN	Clovis	EAS	New Mexico	1	1	0	54	80	48.1%	1,026	720	-29.8%
FMN	Farmington	Nonhub	New Mexico	7	3	-4	351	119	-66.1%	6,669	1,071	-83.9%
GUP	Gallup, NM	Nonhub	New Mexico	3	-	-3	77	-	-100.0%	1,463	-	-100.0%
HOB	Hobbs	Nonhub	New Mexico	-	1	1	-	51	-	-	2,550	-
ROW	Roswell	Nonhub	New Mexico	2	1	-1	81	93	14.8%	1,539	4,650	202.1%
SAF	Santa Fe	Nonhub	New Mexico	2	3	1	97	201	107.2%	1,843	9,588	420.2%
SVC	Silver City	EAS	New Mexico	1	1	0	54	104	92.6%	1,026	936	-8.8%
<b>Average/Total - All Airports</b>			<b>New Mexico</b>	<b>62</b>	<b>37</b>	<b>-25</b>	<b>5,047</b>	<b>3,081</b>	<b>-39.0%</b>	<b>471,155</b>	<b>292,668</b>	<b>-37.9%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>New Mexico</b>	<b>18</b>	<b>12</b>	<b>-6</b>	<b>768</b>	<b>700</b>	<b>-8.9%</b>	<b>14,592</b>	<b>19,983</b>	<b>36.9%</b>
-												
JFK	New York Kennedy	Large	New York	67	63	-4	13,108	11,521	-12.1%	1,467,531	1,468,286	0.1%
LGA	New York LaGuardia	Large	New York	71	68	-3	16,328	14,881	-8.9%	1,501,754	1,538,202	2.4%
BUF	Buffalo	Medium	New York	22	19	-3	3,282	2,629	-19.9%	301,252	261,524	-13.2%
ALB	Albany, NY	Small	New York	21	19	-2	2,155	1,620	-24.8%	166,598	135,724	-18.5%
HPN	Westchester County	Small	New York	14	16	2	1,778	1,293	-27.3%	117,695	79,645	-32.3%
ISP	Long Island Islip	Small	New York	11	6	-5	1,321	493	-62.7%	153,534	59,407	-61.3%
ROC	Rochester, NY	Small	New York	21	16	-5	2,332	1,587	-31.9%	169,442	124,498	-26.5%
SYR	Syracuse	Small	New York	16	16	0	2,126	1,464	-31.1%	136,454	108,579	-20.4%
ART	Watertown (US) NY	EAS	New York	4	1	-3	189	62	-67.2%	3,591	3,100	-13.7%
BGM	Binghamton	Nonhub	New York	5	3	-2	436	242	-44.5%	18,375	10,020	-45.5%
ELM	Elmira/Corning	Nonhub	New York	3	5	2	328	278	-15.2%	13,765	17,113	24.3%
FRG	Farmingdale	Nonhub	New York	-	1	1	-	18	-	-	540	-
HTO	East Hampton	Nonhub	New York	1	-	-1	4	-	-100.0%	32	-	-100.0%
IAG	Niagara Falls	Nonhub	New York	-	6	6	-	68	-	-	9,241	-
ITH	Ithaca	Nonhub	New York	3	3	0	304	255	-16.1%	11,882	10,241	-13.8%
JHW	Jamestown (US) NY	EAS	New York	2	1	-1	116	104	-10.3%	3,944	1,040	-73.6%
JRB	New York, NY	Nonhub	New York	3	-	-3	416	-	-100.0%	3,328	-	-100.0%
MSS	Massena	EAS	New York	2	1	-1	81	93	14.8%	1,539	837	-45.6%
OGS	Ogdensburg	EAS	New York	2	1	-1	112	93	-17.0%	2,128	837	-60.7%
PBG	Plattsburgh	EAS	New York	2	5	3	81	131	61.7%	1,539	14,974	873.0%
SLK	Saranac Lake	EAS	New York	2	1	-1	108	93	-13.9%	2,052	837	-59.2%
SWF	Newburgh	Nonhub	New York	7	5	-2	639	253	-60.4%	54,215	15,516	-71.4%
TSS	East 34th Street Heliport, NY	Nonhub	New York	3	-	-3	209	-	-100.0%	1,672	-	-100.0%
<b>Average/Total - All Airports</b>			<b>New York</b>	<b>282</b>	<b>256</b>	<b>-26</b>	<b>45,453</b>	<b>37,178</b>	<b>-18.2%</b>	<b>4,132,322</b>	<b>3,860,161</b>	<b>-6.6%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>New York</b>	<b>122</b>	<b>106</b>	<b>-16</b>	<b>12,735</b>	<b>8,147</b>	<b>-36.0%</b>	<b>861,785</b>	<b>592,149</b>	<b>-31.3%</b>

## Domestic Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
CLT	Charlotte	Large	North Carolina	101	123	22	18,845	20,919	11.0%	1,778,084	2,098,422	18.0%
RDU	Raleigh/Durham	Medium	North Carolina	42	40	-2	7,168	5,188	-27.6%	608,037	543,822	-10.6%
GSO	Greensboro	Small	North Carolina	20	14	-6	2,205	1,391	-36.9%	133,201	100,458	-24.6%
AVL	Asheville	Nonhub	North Carolina	8	10	2	766	611	-20.2%	36,991	46,716	26.3%
EWN	New Bern	Nonhub	North Carolina	3	2	-1	312	243	-22.1%	15,146	12,085	-20.2%
FAY	Fayetteville, NC	Nonhub	North Carolina	2	3	1	403	406	0.7%	20,230	22,872	13.1%
ILM	Wilmington, NC	Nonhub	North Carolina	5	5	0	713	637	-10.7%	47,045	42,362	-10.0%
ISO	Kinston	Nonhub	North Carolina	1	-	-1	3	-	-100.0%	450	-	-100.0%
OAJ	Jacksonville, NC	Nonhub	North Carolina	2	2	0	360	308	-14.4%	18,530	17,362	-6.3%
PGV	Greenville	EAS	North Carolina	1	1	0	151	114	-24.5%	7,069	5,700	-19.4%
SOP	Southern Pines	Nonhub	North Carolina	1	-	-1	30	-	-100.0%	1,200	-	-100.0%
USA	Concord, NC	Nonhub	North Carolina	-	3	3	-	32	-	-	5,455	-
<b>Average/Total - All Airports</b>			<b>North Carolina</b>	<b>186</b>	<b>203</b>	<b>17</b>	<b>30,956</b>	<b>29,849</b>	<b>-3.6%</b>	<b>2,665,983</b>	<b>2,895,254</b>	<b>8.6%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>North Carolina</b>	<b>43</b>	<b>40</b>	<b>-3</b>	<b>4,943</b>	<b>3,742</b>	<b>-24.3%</b>	<b>279,862</b>	<b>253,010</b>	<b>-9.6%</b>
FAR	Fargo	Small	North Dakota	6	10	4	524	650	24.0%	34,567	44,722	29.4%
BIS	Bismarck	Nonhub	North Dakota	4	7	3	311	412	32.5%	20,552	28,182	37.1%
DIK	Dickinson	Nonhub	North Dakota	2	2	0	162	113	-30.2%	4,860	5,650	16.3%
DVL	Devils Lake	EAS	North Dakota	2	2	0	54	48	-11.1%	1,836	2,400	30.7%
GFK	Grand Forks	Nonhub	North Dakota	2	4	2	173	186	7.5%	12,841	12,979	1.1%
ISN	Williston	Nonhub	North Dakota	1	3	2	81	259	219.8%	2,430	12,950	432.9%
JMS	Jamestown (US) ND	EAS	North Dakota	2	2	0	54	74	37.0%	1,836	3,700	101.5%
MOT	Minot	Nonhub	North Dakota	1	4	3	93	320	244.1%	9,575	20,093	109.8%
<b>Average/Total - All Airports</b>			<b>North Dakota</b>	<b>20</b>	<b>34</b>	<b>14</b>	<b>1,452</b>	<b>2,062</b>	<b>42.0%</b>	<b>88,497</b>	<b>130,676</b>	<b>47.7%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>North Dakota</b>	<b>20</b>	<b>34</b>	<b>14</b>	<b>1,452</b>	<b>2,062</b>	<b>42.0%</b>	<b>88,497</b>	<b>130,676</b>	<b>47.7%</b>
CLE	Cleveland	Medium	Ohio	75	35	-40	9,669	4,262	-55.9%	676,875	445,768	-34.1%
CMH	Columbus, OH	Medium	Ohio	45	30	-15	5,312	4,074	-23.3%	435,031	384,427	-11.6%
CVG	Cincinnati	Medium	Ohio	112	48	-64	13,248	4,161	-68.6%	874,259	345,657	-60.5%
CAK	Akron	Small	Ohio	13	14	1	1,138	932	-18.1%	85,838	89,306	4.0%
DAY	Dayton	Small	Ohio	22	15	-7	2,465	1,600	-35.1%	162,116	120,057	-25.9%
LCK	Columbus Rickenbaker, OH	Nonhub	Ohio	-	6	6	-	61	-	-	10,269	-
LUK	Cincinnati	Nonhub	Ohio	-	3	3	-	59	-	-	1,770	-
TOL	Toledo	Nonhub	Ohio	7	4	-3	552	112	-79.7%	21,982	7,881	-64.1%
YNG	Youngstown	Nonhub	Ohio	1	4	3	2	45	2150.0%	300	7,536	2412.0%
<b>Average/Total - All Airports</b>			<b>Ohio</b>	<b>275</b>	<b>159</b>	<b>-116</b>	<b>32,386</b>	<b>15,306</b>	<b>-52.7%</b>	<b>2,256,401</b>	<b>1,412,671</b>	<b>-37.4%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>Ohio</b>	<b>43</b>	<b>46</b>	<b>3</b>	<b>4,157</b>	<b>2,809</b>	<b>-32.4%</b>	<b>270,236</b>	<b>236,819</b>	<b>-12.4%</b>

## Domestic Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
OKC	Oklahoma City	Medium	Oklahoma	26	22	-4	2,736	2,116	-22.7%	228,294	211,926	-7.2%
TUL	Tulsa	Small	Oklahoma	23	20	-3	2,527	1,623	-35.8%	213,711	157,369	-26.4%
LAW	Lawton	Nonhub	Oklahoma	1	1	0	209	122	-41.6%	7,138	5,998	-16.0%
<b>Average/Total - All Airports</b>			<b>Oklahoma</b>	<b>50</b>	<b>43</b>	<b>-7</b>	<b>5,472</b>	<b>3,861</b>	<b>-29.4%</b>	<b>449,143</b>	<b>375,293</b>	<b>-16.4%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>Oklahoma</b>	<b>24</b>	<b>21</b>	<b>-3</b>	<b>2,736</b>	<b>1,745</b>	<b>-36.2%</b>	<b>220,849</b>	<b>163,367</b>	<b>-26.0%</b>
PDX	Portland, OR	Large	Oregon	47	57	10	8,219	7,653	-6.9%	847,157	938,915	10.8%
EUG	Eugene	Small	Oregon	9	9	0	924	649	-29.8%	48,313	47,342	-2.0%
LMT	Klamath Falls	Nonhub	Oregon	1	-	-1	89	-	-100.0%	3,293	-	-100.0%
MFR	Medford	Nonhub	Oregon	8	8	0	927	576	-37.9%	41,967	42,188	0.5%
OTH	North Bend	Nonhub	Oregon	1	3	2	151	140	-7.3%	5,587	3,080	-44.9%
PDT	Pendleton	EAS	Oregon	2	1	-1	85	94	10.6%	3,145	846	-73.1%
RDM	Redmond	Nonhub	Oregon	8	6	-2	722	499	-30.9%	32,220	31,918	-0.9%
SLE	Salem, OR	Nonhub	Oregon	1	-	-1	62	-	-100.0%	3,100	-	-100.0%
<b>Average/Total - All Airports</b>			<b>Oregon</b>	<b>77</b>	<b>84</b>	<b>7</b>	<b>11,179</b>	<b>9,611</b>	<b>-14.0%</b>	<b>984,782</b>	<b>1,064,289</b>	<b>8.1%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>Oregon</b>	<b>30</b>	<b>27</b>	<b>-3</b>	<b>2,960</b>	<b>1,958</b>	<b>-33.9%</b>	<b>137,625</b>	<b>125,374</b>	<b>-8.9%</b>
PHL	Philadelphia	Large	Pennsylvania	90	95	5	17,639	15,362	-12.9%	1,695,562	1,451,466	-14.4%
PIT	Pittsburgh	Medium	Pennsylvania	62	44	-18	7,134	4,822	-32.4%	574,118	452,699	-21.1%
MDT	Harrisburg	Small	Pennsylvania	12	9	-3	1,362	900	-33.9%	72,516	61,526	-15.2%
ABE	Allentown	Nonhub	Pennsylvania	11	9	-2	929	493	-46.9%	48,869	33,592	-31.3%
AOO	Altoona	EAS	Pennsylvania	1	1	0	81	114	40.7%	1,944	1,140	-41.4%
AVP	Wilkes-Barre	Nonhub	Pennsylvania	7	7	0	550	461	-16.2%	24,576	22,942	-6.6%
BFD	Bradford	EAS	Pennsylvania	2	1	-1	116	104	-10.3%	3,944	1,040	-73.6%
DUJ	Dubois	EAS	Pennsylvania	2	2	0	104	78	-25.0%	1,976	2,652	34.2%
ERI	Erie	Nonhub	Pennsylvania	5	3	-2	446	233	-47.8%	18,656	10,506	-43.7%
FKL	Franklin	EAS	Pennsylvania	2	1	-1	77	83	7.8%	1,463	830	-43.3%
IPT	Williamsport	Nonhub	Pennsylvania	1	1	0	145	86	-40.7%	5,729	3,182	-44.5%
JST	Johnstown	EAS	Pennsylvania	1	2	1	112	109	-2.7%	3,808	3,706	-2.7%
LBE	Latrobe	Nonhub	Pennsylvania	1	5	4	62	147	137.1%	2,108	25,407	1105.3%
LNS	Lancaster	EAS	Pennsylvania	1	2	1	81	130	60.5%	1,539	1,300	-15.5%
SCE	State College	Nonhub	Pennsylvania	5	5	0	473	378	-20.1%	19,222	17,080	-11.1%
<b>Average/Total - All Airports</b>			<b>Pennsylvania</b>	<b>203</b>	<b>187</b>	<b>-16</b>	<b>29,311</b>	<b>23,500</b>	<b>-19.8%</b>	<b>2,476,030</b>	<b>2,089,068</b>	<b>-15.6%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>Pennsylvania</b>	<b>51</b>	<b>48</b>	<b>-3</b>	<b>4,538</b>	<b>3,316</b>	<b>-26.9%</b>	<b>206,350</b>	<b>184,903</b>	<b>-10.4%</b>

## Domestic Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
PVD	Providence	Small	Rhode Island	24	16	-8	3,429	1,850	-46.0%	300,277	182,002	-39.4%
BID	Block Island	Nonhub	Rhode Island	1	1	0	221	108	-51.1%	1,989	972	-51.1%
WST	Westerly	Nonhub	Rhode Island	1	-	-1	226	-	-100.0%	2,034	-	-100.0%
<b>Average/Total - All Airports</b>			<b>Rhode Island</b>	<b>26</b>	<b>17</b>	<b>-9</b>	<b>3,876</b>	<b>1,958</b>	<b>-49.5%</b>	<b>304,300</b>	<b>182,974</b>	<b>-39.9%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>Rhode Island</b>	<b>26</b>	<b>17</b>	<b>-9</b>	<b>3,876</b>	<b>1,958</b>	<b>-49.5%</b>	<b>304,300</b>	<b>182,974</b>	<b>-39.9%</b>
CAE	Columbia, SC	Small	South Carolina	14	9	-5	1,411	922	-34.7%	76,330	55,738	-27.0%
CHS	Charleston, SC	Small	South Carolina	16	22	6	1,905	2,086	9.5%	145,426	184,456	26.8%
GSP	Greenville, SC	Small	South Carolina	18	18	0	1,776	1,361	-23.4%	97,112	102,500	5.5%
MYR	Myrtle Beach	Small	South Carolina	15	31	16	1,040	1,113	7.0%	101,285	138,287	36.5%
FLO	Florence, SC	Nonhub	South Carolina	2	1	-1	202	117	-42.1%	7,694	5,148	-33.1%
HHH	Hilton Head Island	Nonhub	South Carolina	2	1	-1	371	158	-57.4%	17,323	5,846	-66.3%
<b>Average/Total - All Airports</b>			<b>South Carolina</b>	<b>67</b>	<b>82</b>	<b>15</b>	<b>6,705</b>	<b>5,757</b>	<b>-14.1%</b>	<b>445,170</b>	<b>491,975</b>	<b>10.5%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>South Carolina</b>	<b>67</b>	<b>82</b>	<b>15</b>	<b>6,705</b>	<b>5,757</b>	<b>-14.1%</b>	<b>445,170</b>	<b>491,975</b>	<b>10.5%</b>
FSD	Sioux Falls	Small	South Dakota	8	10	2	700	649	-7.3%	47,871	46,918	-2.0%
ABR	Aberdeen (US)	EAS	South Dakota	3	1	-2	209	62	-70.3%	6,296	3,100	-50.8%
ATY	Watertown (US) SD	EAS	South Dakota	2	1	-1	124	93	-25.0%	4,216	837	-80.1%
BKX	Brookings, SD	Nonhub	South Dakota	1	-	-1	50	-	-100.0%	950	-	-100.0%
HON	Huron	EAS	South Dakota	2	2	0	108	124	14.8%	2,052	1,116	-45.6%
PIR	Pierre	Nonhub	South Dakota	3	3	0	167	124	-25.7%	4,103	1,767	-56.9%
RAP	Rapid City	Nonhub	South Dakota	5	9	4	547	612	11.9%	35,253	39,140	11.0%
<b>Average/Total - All Airports</b>			<b>South Dakota</b>	<b>24</b>	<b>26</b>	<b>2</b>	<b>1,905</b>	<b>1,664</b>	<b>-12.7%</b>	<b>100,741</b>	<b>92,878</b>	<b>-7.8%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>South Dakota</b>	<b>24</b>	<b>26</b>	<b>2</b>	<b>1,905</b>	<b>1,664</b>	<b>-12.7%</b>	<b>100,741</b>	<b>92,878</b>	<b>-7.8%</b>
BNA	Nashville	Medium	Tennessee	46	48	2	6,001	5,733	-4.5%	621,209	638,630	2.8%
MEM	Memphis	Small	Tennessee	82	38	-44	8,430	2,608	-69.1%	640,517	209,697	-67.3%
TYS	Knoxville	Small	Tennessee	20	17	-3	2,014	1,476	-26.7%	112,891	93,858	-16.9%
CHA	Chattanooga	Nonhub	Tennessee	10	8	-2	726	626	-13.8%	35,675	38,426	7.7%
MKL	Jackson (US) TN	EAS	Tennessee	-	1	1	-	78	-	-	624	-
TRI	Tri-Cities	Nonhub	Tennessee	7	4	-3	689	375	-45.6%	32,339	23,971	-25.9%
<b>Average/Total - All Airports</b>			<b>Tennessee</b>	<b>165</b>	<b>116</b>	<b>-49</b>	<b>17,860</b>	<b>10,896</b>	<b>-39.0%</b>	<b>1,442,631</b>	<b>1,005,206</b>	<b>-30.3%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>Tennessee</b>	<b>119</b>	<b>68</b>	<b>-51</b>	<b>11,859</b>	<b>5,163</b>	<b>-56.5%</b>	<b>821,422</b>	<b>366,576</b>	<b>-55.4%</b>

## Domestic Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
DFW	Dallas/Fort Worth	Large	Texas	131	147	16	26,671	26,130	-2.0%	2,892,506	2,988,866	3.3%
IAH	Houston Bush	Large	Texas	116	116	0	21,332	16,052	-24.8%	1,862,061	1,611,234	-13.5%
SAT	San Antonio	Medium	Texas	38	30	-8	4,410	3,452	-21.7%	482,699	424,964	-12.0%
AUS	Austin	Medium	Texas	44	44	0	4,887	4,884	-0.1%	540,072	633,003	17.2%
DAL	Dallas Love	Medium	Texas	16	52	36	4,810	5,855	21.7%	560,372	812,448	45.0%
HOU	Houston Hobby	Medium	Texas	32	50	18	5,065	5,012	-1.0%	642,585	673,188	4.8%
AMA	Amarillo	Small	Texas	7	5	-2	783	492	-37.2%	66,370	40,554	-38.9%
ELP	El Paso	Small	Texas	18	12	-6	2,054	1,407	-31.5%	241,837	149,477	-38.2%
LBB	Lubbock	Small	Texas	7	6	-1	822	553	-32.7%	76,173	51,547	-32.3%
MAF	Midland/Odessa	Small	Texas	8	6	-2	747	823	10.2%	68,940	73,150	6.1%
ABI	Abilene	Nonhub	Texas	2	1	-1	298	210	-29.5%	11,434	9,954	-12.9%
ACT	Waco	Nonhub	Texas	2	1	-1	348	148	-57.5%	10,888	7,400	-32.0%
BPT	Beaumont	Nonhub	Texas	1	1	0	147	91	-38.1%	5,143	4,550	-11.5%
BRO	Brownsville	Nonhub	Texas	1	3	2	186	241	29.6%	8,897	13,081	47.0%
CLL	College Station	Nonhub	Texas	2	2	0	367	219	-40.3%	11,906	10,938	-8.1%
CRP	Corpus Christi	Nonhub	Texas	5	3	-2	832	522	-37.3%	54,989	39,782	-27.7%
DRT	Del Rio, TX	Nonhub	Texas	1	-	-1	85	-	-100.0%	2,890	-	-100.0%
GGG	Longview	Nonhub	Texas	1	1	0	93	60	-35.5%	2,790	3,000	7.5%
GRK	Killeen	Nonhub	Texas	3	3	0	621	372	-40.1%	27,139	19,804	-27.0%
HRL	Harlingen	Nonhub	Texas	6	3	-3	516	283	-45.2%	54,905	27,210	-50.4%
LRD	Laredo	Nonhub	Texas	3	4	1	275	227	-17.5%	14,047	13,935	-0.8%
MFE	McAllen	Nonhub	Texas	6	5	-1	512	422	-17.6%	49,056	45,184	-7.9%
SJT	San Angelo	Nonhub	Texas	3	1	-2	214	150	-29.9%	8,520	7,500	-12.0%
SPS	Wichita Falls	Nonhub	Texas	2	1	-1	211	122	-42.2%	6,594	5,890	-10.7%
TYR	Tyler	Nonhub	Texas	2	2	0	325	228	-29.8%	10,430	11,400	9.3%
VCT	Victoria (US)	EAS	Texas	1	1	0	62	39	-37.1%	2,108	741	-64.8%
<b>Average/Total - All Airports</b>			<b>Texas</b>	<b>458</b>	<b>500</b>	<b>42</b>	<b>76,673</b>	<b>67,994</b>	<b>-11.3%</b>	<b>7,715,351</b>	<b>7,678,800</b>	<b>-0.5%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>Texas</b>	<b>81</b>	<b>61</b>	<b>-20</b>	<b>9,498</b>	<b>6,609</b>	<b>-30.4%</b>	<b>735,056</b>	<b>535,097</b>	<b>-27.2%</b>
SLC	Salt Lake City	Large	Utah	106	83	-23	13,669	9,879	-27.7%	1,228,326	1,112,060	-9.5%
CDC	Cedar City	EAS	Utah	4	1	-3	139	52	-62.6%	2,641	2,600	-1.6%
CNY	Moab	EAS	Utah	2	-	-2	73	-	-100.0%	1,387	-	-100.0%
OGD	Ogden, UT	Nonhub	Utah	-	1	1	-	9	-	-	1,424	-
PVU	Provo	Nonhub	Utah	-	3	3	-	38	-	-	5,928	-
SGU	St George	Nonhub	Utah	2	2	0	310	155	-50.0%	9,300	7,750	-16.7%
VEL	Vernal	EAS	Utah	1	-	-1	54	-	-100.0%	1,026	-	-100.0%
<b>Average/Total - All Airports</b>			<b>Utah</b>	<b>115</b>	<b>90</b>	<b>-25</b>	<b>14,245</b>	<b>10,133</b>	<b>-28.9%</b>	<b>1,242,680</b>	<b>1,129,762</b>	<b>-9.1%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>Utah</b>	<b>9</b>	<b>7</b>	<b>-2</b>	<b>576</b>	<b>254</b>	<b>-55.9%</b>	<b>14,354</b>	<b>17,702</b>	<b>23.3%</b>

## Domestic Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats			
				Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.	
BTV	Burlington, VT	Small	Vermont	13	11	-2	1,335	988	-26.0%	83,758	68,902	-17.7%	
RUT	Rutland	EAS	Vermont	1	1	0	54	93	72.2%	1,026	837	-18.4%	
<b>Average/Total - All Airports</b>			<b>Vermont</b>	<b>14</b>	<b>12</b>	<b>-2</b>	<b>1,389</b>	<b>1,081</b>	<b>-22.2%</b>	<b>84,784</b>	<b>69,739</b>	<b>-17.7%</b>	
<b>Average/Total - Small, Nonhub and EAS</b>			<b>Vermont</b>	<b>14</b>	<b>12</b>	<b>-2</b>	<b>1,389</b>	<b>1,081</b>	<b>-22.2%</b>	<b>84,784</b>	<b>69,739</b>	<b>-17.7%</b>	
DCA	Washington National	Large	Virginia	72	82	10	11,732	12,335	5.1%	1,130,674	1,238,612	9.5%	
IAD	Washington Dulles	Large	Virginia	80	80	0	11,475	8,234	-28.2%	1,010,135	774,565	-23.3%	
ORF	Norfolk	Small	Virginia	25	18	-7	2,937	2,087	-28.9%	230,764	171,084	-25.9%	
RIC	Richmond	Small	Virginia	21	18	-3	2,943	2,306	-21.6%	217,300	192,025	-11.6%	
CHO	Charlottesville	Nonhub	Virginia	7	6	-1	668	594	-11.1%	26,021	29,190	12.2%	
LYH	Lynchburg	Nonhub	Virginia	2	1	-1	192	172	-10.4%	8,381	8,535	1.8%	
PHF	Newport News	Nonhub	Virginia	8	3	-5	867	410	-52.7%	72,454	22,066	-69.5%	
ROA	Roanoke	Nonhub	Virginia	10	8	-2	977	656	-32.9%	46,605	36,272	-22.2%	
SHD	Staunton	EAS	Virginia	1	1	0	85	78	-8.2%	1,615	2,652	64.2%	
<b>Average/Total - All Airports</b>			<b>Virginia</b>	<b>226</b>	<b>217</b>	<b>-9</b>	<b>31,876</b>	<b>26,872</b>	<b>-15.7%</b>	<b>2,743,949</b>	<b>2,475,001</b>	<b>-9.8%</b>	
<b>Average/Total - Small, Nonhub and EAS</b>			<b>Virginia</b>	<b>74</b>	<b>55</b>	<b>-19</b>	<b>8,669</b>	<b>6,303</b>	<b>-27.3%</b>	<b>603,140</b>	<b>461,824</b>	<b>-23.4%</b>	
SEA	Seattle	Large	Washington	75	83	8	13,871	16,218	16.9%	1,730,528	2,173,917	25.6%	
GEG	Spokane	Small	Washington	14	11	-3	2,231	1,592	-28.6%	213,806	171,765	-19.7%	
PSC	Pasco	Nonhub	Washington	6	9	3	579	509	-12.1%	29,839	41,208	38.1%	
BLI	Bellingham	Small	Washington	5	8	3	311	326	4.8%	26,728	38,238	43.1%	
EAT	Wenatchee	Nonhub	Washington	1	1	0	155	119	-23.2%	5,735	9,044	57.7%	
PUW	Pullman	Nonhub	Washington	2	1	-1	124	92	-25.8%	4,588	6,992	52.4%	
YKM	Yakima	Nonhub	Washington	2	1	-1	248	87	-64.9%	9,982	6,612	-33.8%	
LKE	Seattle	Nonhub	Washington	5	7	2	775	968	24.9%	4,650	5,808	24.9%	
ALW	Walla Walla	Nonhub	Washington	1	1	0	89	68	-23.6%	3,293	5,168	56.9%	
BFI	Seattle	Nonhub	Washington	3	2	-1	452	184	-59.3%	4,972	1,656	-66.7%	
FRD	Friday Harbor	Nonhub	Washington	1	2	1	120	155	29.2%	1,320	1,395	5.7%	
ESD	Eastsound	Nonhub	Washington	-	2	2	-	124	-	-	-	1,116	-
KEH	Kenmore Air Harbor	Nonhub	Washington	-	7	7	-	149	-	-	-	894	-
DHB	Deer Harbor	Nonhub	Washington	-	2	2	-	141	-	-	-	846	-
LPS	Lopez Island	Nonhub	Washington	1	2	1	101	141	39.6%	606	846	39.6%	
RCE	Roche Harbor	Nonhub	Washington	1	2	1	101	141	39.6%	606	846	39.6%	
WSX	Westsound	Nonhub	Washington	1	2	1	101	141	39.6%	606	846	39.6%	
RSJ	Rosario (US)	Nonhub	Washington	1	2	1	132	141	6.8%	792	846	6.8%	
FBS	Friday Harbor SPB	Nonhub	Washington	5	2	-3	216	141	-34.7%	1,296	846	-34.7%	
CLM	Port Angeles	Nonhub	Washington	1	-	-1	236	-	-100.0%	2,596	-	-100.0%	
ODW	Oak Harbor, WA	Nonhub	Washington	2	-	-2	209	-	-100.0%	2,299	-	-100.0%	
<b>Average/Total - All Airports</b>			<b>Washington</b>	<b>127</b>	<b>147</b>	<b>20</b>	<b>20,051</b>	<b>21,437</b>	<b>6.9%</b>	<b>2,044,242</b>	<b>2,468,889</b>	<b>20.8%</b>	
<b>Average/Total - Small, Nonhub and EAS</b>			<b>Washington</b>	<b>52</b>	<b>64</b>	<b>12</b>	<b>6,180</b>	<b>5,219</b>	<b>-15.6%</b>	<b>313,714</b>	<b>294,972</b>	<b>-6.0%</b>	

## Domestic Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
BKW	Beckley	EAS	West Virginia	2	1	-1	85	52	-38.8%	1,615	1,560	-3.4%
BLF	Bluefield, WV	Nonhub	West Virginia	2	-	-2	112	-	-100.0%	2,128	-	-100.0%
CKB	Clarksburg	EAS	West Virginia	2	5	3	85	88	3.5%	2,890	4,312	49.2%
CRW	Charleston, WV	Nonhub	West Virginia	11	8	-3	986	539	-45.3%	38,721	27,665	-28.6%
HTS	Huntington	Nonhub	West Virginia	4	5	1	199	150	-24.6%	8,544	12,902	51.0%
LWB	Lewisburg	EAS	West Virginia	4	2	-2	120	62	-48.3%	4,202	2,108	-49.8%
MGW	Morgantown	EAS	West Virginia	2	3	1	116	104	-10.3%	3,944	3,536	-10.3%
PKB	Parkersburg/Marietta	EAS	West Virginia	1	2	1	85	78	-8.2%	2,890	2,652	-8.2%
<b>Average/Total - All Airports</b>			<b>West Virginia</b>	<b>28</b>	<b>26</b>	<b>-2</b>	<b>1,788</b>	<b>1,073</b>	<b>-40.0%</b>	<b>64,934</b>	<b>54,735</b>	<b>-15.7%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>West Virginia</b>	<b>28</b>	<b>26</b>	<b>-2</b>	<b>1,788</b>	<b>1,073</b>	<b>-40.0%</b>	<b>64,934</b>	<b>54,735</b>	<b>-15.7%</b>
MKE	Milwaukee	Medium	Wisconsin	51	31	-20	6,782	3,240	-52.2%	459,609	345,771	-24.8%
MSN	Madison	Small	Wisconsin	16	10	-6	1,555	1,103	-29.1%	95,404	96,437	1.1%
ARV	Minocqua, WI	Nonhub	Wisconsin	1	-	-1	8	-	-100.0%	80	-	-100.0%
ATW	Appleton	Nonhub	Wisconsin	6	7	1	840	426	-49.3%	37,286	28,295	-24.1%
CWA	Wausau	Nonhub	Wisconsin	4	3	-1	479	269	-43.8%	19,485	13,450	-31.0%
EAU	Eau Claire	EAS	Wisconsin	3	1	-2	152	62	-59.2%	5,296	3,100	-41.5%
EGV	Eagle River, WI	Nonhub	Wisconsin	1	-	-1	10	-	-100.0%	100	-	-100.0%
GRB	Green Bay	Nonhub	Wisconsin	9	4	-5	881	540	-38.7%	54,541	37,062	-32.0%
LSE	La Crosse	Nonhub	Wisconsin	2	2	0	315	188	-40.3%	17,739	9,370	-47.2%
RHI	Rhineland	EAS	Wisconsin	4	2	-2	270	88	-67.4%	7,455	4,400	-41.0%
<b>Average/Total - All Airports</b>			<b>Wisconsin</b>	<b>97</b>	<b>60</b>	<b>-37</b>	<b>11,292</b>	<b>5,916</b>	<b>-47.6%</b>	<b>696,995</b>	<b>537,885</b>	<b>-22.8%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>Wisconsin</b>	<b>46</b>	<b>29</b>	<b>-17</b>	<b>4,510</b>	<b>2,676</b>	<b>-40.7%</b>	<b>237,386</b>	<b>192,114</b>	<b>-19.1%</b>
COD	Cody	EAS	Wyoming	2	3	1	155	97	-37.4%	5,487	4,930	-10.2%
CPR	Casper	Nonhub	Wyoming	3	3	0	357	234	-34.5%	12,815	12,744	-0.6%
CYS	Cheyenne	Nonhub	Wyoming	1	1	0	226	83	-63.3%	4,635	747	-83.9%
GCC	Gillette	Nonhub	Wyoming	1	2	1	146	87	-40.4%	4,094	4,350	6.3%
JAC	Jackson, WY	Nonhub	Wyoming	6	9	3	421	497	18.1%	54,639	58,513	7.1%
LAR	Laramie	EAS	Wyoming	2	1	-1	139	52	-62.6%	2,641	2,600	-1.6%
RIW	Riverton	Nonhub	Wyoming	1	2	1	89	124	39.3%	2,670	1,116	-58.2%
RKS	Rock Springs	Nonhub	Wyoming	1	1	0	141	57	-59.6%	3,317	2,850	-14.1%
SHR	Sheridan	Nonhub	Wyoming	2	-	-2	217	-	-100.0%	4,893	-	-100.0%
WRL	Worland	EAS	Wyoming	1	1	0	54	62	14.8%	1,026	558	-45.6%
<b>Average/Total - All Airports</b>			<b>Wyoming</b>	<b>20</b>	<b>23</b>	<b>3</b>	<b>1,945</b>	<b>1,293</b>	<b>-33.5%</b>	<b>96,217</b>	<b>88,408</b>	<b>-8.1%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			<b>Wyoming</b>	<b>20</b>	<b>23</b>	<b>3</b>	<b>1,945</b>	<b>1,293</b>	<b>-33.5%</b>	<b>96,217</b>	<b>88,408</b>	<b>-8.1%</b>
<b>Average/Total - All Airports - All States</b>				<b>5,873</b>	<b>5,557</b>	<b>-316</b>	<b>846,961</b>	<b>697,738</b>	<b>-17.6%</b>	<b>80,588,619</b>	<b>75,926,236</b>	<b>-5.8%</b>
<b>Average/Total - Small, Nonhub and EAS - All States</b>				<b>2,098</b>	<b>1,950</b>	<b>-148</b>	<b>205,754</b>	<b>145,025</b>	<b>-29.5%</b>	<b>13,388,597</b>	<b>10,831,715</b>	<b>-19.1%</b>



# **VIRGINIA COMMERCIAL AIR SERVICE STRATEGIC REVIEW**

## **State by State Summary 14\_15**

## Domestic Only

Airport	Airport Name	Hub Size	State	Number of Carriers			Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
BHM	Birmingham, AL	Small	Alabama	5	4	-1	21	18	-3	1,614	1,659	2.8%	153,058	150,736	-1.5%
HSV	Huntsville	Small	Alabama	3	3	0	9	9	0	803	861	7.2%	64,107	59,860	-6.6%
DHN	Dothan	Nonhub	Alabama	1	1	0	1	1	0	116	117	0.9%	5,800	5,850	0.9%
MGM	Montgomery	Nonhub	Alabama	2	2	0	3	3	0	374	347	-7.2%	20,338	17,764	-12.7%
MOB	Mobile	Nonhub	Alabama	3	3	0	5	5	0	593	563	-5.1%	34,882	32,064	-8.1%
MSL	Muscle Shoals	EAS	Alabama	1	1	0	1	1	0	52	104	100.0%	1,768	936	-47.1%
<b>Average/Total - All Airports</b>			Alabama	<b>3</b>	<b>2</b>	<b>0</b>	<b>40</b>	<b>37</b>	<b>-3</b>	<b>3,552</b>	<b>3,651</b>	2.8%	<b>279,953</b>	<b>267,210</b>	-4.6%
<b>Average/Total - Small, Nonhub and EAS</b>			Alabama	3	2	0	40	37	-3	3,552	3,651	2.8%	279,953	267,210	-4.6%
ANC	Anchorage	Medium	Alaska	11	10	-1	41	40	-1	4,178	4,148	-0.7%	349,430	382,406	9.4%
FAI	Fairbanks	Small	Alaska	8	7	-1	22	18	-4	1,366	1,331	-2.6%	77,043	75,325	-2.2%
JNU	Juneau	Small	Alaska	5	5	0	14	14	0	2,235	2,112	-5.5%	84,877	88,073	3.8%
<b>Average/Total - All Airports</b>			Alaska	<b>8</b>	<b>7</b>	<b>-1</b>	<b>77</b>	<b>72</b>	<b>-5</b>	<b>7,779</b>	<b>7,591</b>	-2.4%	<b>511,350</b>	<b>545,804</b>	6.7%
<b>Average/Total - Small Hub ONLY</b>			Alaska	7	6	-1	36	32	-4	3,601	3,443	-4.4%	161,920	163,398	0.9%
PHX	Phoenix	Large	Arizona	10	10	0	78	78	0	15,067	15,342	1.8%	1,995,157	2,075,195	4.0%
AZA	Phoenix Mesa	Small	Arizona	1	1	0	33	34	1	308	330	7.1%	50,176	52,780	5.2%
TUS	Tucson	Small	Arizona	5	5	0	14	13	-1	1,501	1,444	-3.8%	153,434	145,212	-5.4%
FLG	Flagstaff	Nonhub	Arizona	1	1	0	1	1	0	168	169	0.6%	8,400	8,450	0.6%
GCN	Grand Canyon	Nonhub	Arizona	1	1	0	1	1	0	21	21	0.0%	189	189	0.0%
GCW	Grand Canyon	Nonhub	Arizona	1	1	0	1	1	0	31	31	0.0%	186	186	0.0%
IFP	Bullhead City	Nonhub	Arizona	0	0	0	-	-	0	-	-	-	-	-	-
IGM	Kingman	EAS	Arizona	1	0	-1	2	-	-2	62	-	-100.0%	558	-	-100.0%
PGA	Page	EAS	Arizona	2	2	0	4	3	-1	114	114	0.0%	1,026	1,026	0.0%
PRC	Prescott	EAS	Arizona	1	1	0	1	1	0	88	88	0.0%	792	792	0.0%
SOW	Show Low	EAS	Arizona	1	1	0	2	1	-1	57	52	-8.8%	513	468	-8.8%
YUM	Yuma	Nonhub	Arizona	2	1	-1	2	1	-1	234	174	-25.6%	10,460	8,700	-16.8%
<b>Average/Total - All Airports</b>			Arizona	<b>2</b>	<b>2</b>	<b>0</b>	<b>139</b>	<b>134</b>	<b>-5</b>	<b>29,031</b>	<b>28,799</b>	-0.8%	<b>2,894,161</b>	<b>3,002,200</b>	3.7%
<b>Average/Total - Small, Nonhub and EAS</b>			Arizona	1	1	0	61	56	-5	2,584	2,423	-6.2%	225,734	217,803	-3.5%
LIT	Little Rock	Small	Arkansas	6	5	-1	15	14	-1	1,334	1,290	-3.3%	122,453	111,872	-8.6%
XNA	Fayetteville, AR	Small	Arkansas	4	4	0	14	13	-1	1,120	1,118	-0.2%	73,724	73,655	-0.1%
ELD	El Dorado	EAS	Arkansas	1	1	0	2	2	0	104	104	0.0%	936	936	0.0%
FSM	Fort Smith	Nonhub	Arkansas	2	2	0	2	2	0	205	170	-17.1%	10,172	8,362	-17.8%
HOT	Hot Springs	EAS	Arkansas	1	1	0	2	2	0	78	78	0.0%	702	702	0.0%
HRO	Harrison	EAS	Arkansas	1	1	0	2	2	0	99	99	0.0%	891	891	0.0%
JBR	Jonesboro	EAS	Arkansas	1	1	0	1	1	0	78	78	0.0%	624	624	0.0%
TXK	Texarkana	Nonhub	Arkansas	1	1	0	1	1	0	90	91	1.1%	4,500	4,550	1.1%
<b>Average/Total - All Airports</b>			Arkansas	<b>2</b>	<b>2</b>	<b>0</b>	<b>39</b>	<b>37</b>	<b>-2</b>	<b>3,108</b>	<b>3,028</b>	-2.6%	<b>214,002</b>	<b>201,592</b>	-5.8%
<b>Average/Total - Small, Nonhub and EAS</b>			Arkansas	2	2	0	39	37	-2	3,108	3,028	-2.6%	214,002	201,592	-5.8%

## Domestic Only

Airport	Airport Name	Hub Size	State	Number of Carriers			Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
LAX	Los Angeles	Large	California	13	14	1	102	99	-3	21,565	21,621	0.3%	2,773,950	2,954,869	6.5%
SAN	San Diego	Large	California	13	13	0	47	50	3	7,303	7,364	0.8%	1,011,384	1,055,091	4.3%
SFO	San Francisco	Large	California	10	10	0	72	71	-1	15,449	15,090	-2.3%	1,973,081	2,075,834	5.2%
BUR	Burbank	Medium	California	7	7	0	12	14	2	2,020	2,105	4.2%	237,221	235,854	-0.6%
OAK	Oakland	Medium	California	8	8	0	35	41	6	4,214	4,390	4.2%	603,077	627,362	4.0%
ONT	Ontario	Medium	California	5	5	0	13	13	0	1,775	1,783	0.5%	217,915	214,172	-1.7%
SJC	San Jose	Medium	California	7	7	0	26	27	1	3,954	4,037	2.1%	521,793	537,968	3.1%
SMF	Sacramento	Medium	California	7	8	1	27	29	2	3,865	3,990	3.2%	498,208	513,396	3.0%
SNA	Orange County	Medium	California	6	6	0	17	20	3	3,372	3,614	7.2%	465,962	511,180	9.7%
FAT	Fresno	Small	California	6	5	-1	11	10	-1	1,125	875	-22.2%	68,561	63,199	-7.8%
LGB	Long Beach	Small	California	4	3	-1	13	12	-1	1,251	1,071	-14.4%	162,989	140,650	-13.7%
PSP	Palm Springs	Small	California	5	5	0	9	9	0	689	510	-26.0%	44,602	39,599	-11.2%
ACV	Arcata/Eureka	Nonhub	California	1	1	0	3	1	-2	270	123	-54.4%	8,100	6,750	-16.7%
BFL	Bakersfield	Nonhub	California	3	2	-1	5	4	-1	320	265	-17.2%	17,130	14,470	-15.5%
CEC	Crescent City	EAS	California	1	0	-1	2	-	-2	83	-	-100.0%	2,490	-	-100.0%
CIC	Chico	Nonhub	California	1	0	-1	1	-	-1	89	-	-100.0%	2,670	-	-100.0%
CLD	San Diego	Nonhub	California	1	1	0	1	1	0	230	62	-73.0%	6,900	1,984	-71.2%
IPL	Imperial	EAS	California	1	1	0	2	2	0	104	104	0.0%	936	936	0.0%
IYK	Inyokern	Nonhub	California	0	0	0	-	-	0	-	-	-	-	-	-
MCE	Merced	EAS	California	1	1	0	1	1	0	57	57	0.0%	513	513	0.0%
MMH	Mammoth Lakes	Nonhub	California	1	1	0	1	1	0	31	31	0.0%	2,356	2,356	0.0%
MOD	Modesto	Nonhub	California	0	0	0	-	-	0	-	-	-	-	-	-
MRY	Monterey	Nonhub	California	4	4	0	5	5	0	439	392	-10.7%	21,580	22,846	5.9%
OXR	Oxnard/Ventura	Nonhub	California	0	0	0	-	-	0	-	-	-	-	-	-
PMD	Palmdale	Nonhub	California	0	0	0	-	-	0	-	-	-	-	-	-
RDD	Redding	Nonhub	California	1	1	0	1	1	0	93	62	-33.3%	2,790	3,100	11.1%
SBA	Santa Barbara	Nonhub	California	4	3	-1	6	6	0	690	656	-4.9%	36,506	38,133	4.5%
SBP	San Luis Obispo	Nonhub	California	2	2	0	3	3	0	460	259	-43.7%	17,766	14,279	-19.6%
SCK	Sacramento	Nonhub	California	1	1	0	3	2	-1	54	53	-1.9%	9,212	8,728	-5.3%
SMX	Santa Maria	Nonhub	California	2	2	0	2	2	0	124	75	-39.5%	5,760	5,258	-8.7%
STS	Santa Rosa	Nonhub	California	1	1	0	4	4	0	189	210	11.1%	14,364	15,960	11.1%
VIS	Visalia	EAS	California	1	1	0	1	2	1	57	104	82.5%	513	936	82.5%
<b>Average/Total - All Airports</b>			California	<b>4</b>	<b>4</b>	<b>0</b>	<b>425</b>	<b>430</b>	<b>5</b>	<b>69,872</b>	<b>68,903</b>	<b>-1.4%</b>	<b>8,728,329</b>	<b>9,105,423</b>	<b>4.3%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			California	<b>2</b>	<b>2</b>	<b>0</b>	<b>74</b>	<b>66</b>	<b>-8</b>	<b>6,355</b>	<b>4,909</b>	<b>-22.8%</b>	<b>425,738</b>	<b>379,697</b>	<b>-10.8%</b>

## Domestic Only

Airport	Airport Name	Hub Size	State	Number of Carriers			Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
DEN	Denver	Large	Colorado	9	10	1	157	145	-12	23,676	22,307	-5.8%	2,682,140	2,625,442	-2.1%
COS	Colorado Springs	Small	Colorado	5	5	0	12	10	-2	921	773	-16.1%	72,102	64,829	-10.1%
ALS	Alamosa	EAS	Colorado	1	1	0	2	2	0	109	109	0.0%	981	981	0.0%
ASE	Aspen	Nonhub	Colorado	2	2	0	5	5	0	416	407	-2.2%	29,000	28,313	-2.4%
CEZ	Cortez	EAS	Colorado	1	1	0	1	1	0	57	57	0.0%	513	513	0.0%
DRO	Durango	Nonhub	Colorado	3	2	-1	3	3	0	395	379	-4.1%	26,057	23,167	-11.1%
EGE	Vail	Nonhub	Colorado	2	2	0	3	3	0	108	96	-11.1%	11,672	9,911	-15.1%
FNL	Fort Collins/Loveland	Nonhub	Colorado	0	0	0	-	-	0	-	-	-	-	-	-
GJT	Grand Junction	Nonhub	Colorado	4	4	0	7	7	0	427	417	-2.3%	25,265	24,218	-4.1%
GUC	Gunnison	Nonhub	Colorado	1	1	0	2	2	0	57	63	10.5%	3,010	4,070	35.2%
HDN	Hayden	Nonhub	Colorado	1	1	0	2	2	0	96	93	-3.1%	6,417	5,931	-7.6%
MTJ	Montrose	Nonhub	Colorado	2	3	1	3	5	2	156	161	3.2%	9,952	10,573	6.2%
PUB	Pueblo	EAS	Colorado	1	0	-1	1	-	-1	52	-	-100.0%	1,560	-	-100.0%
TEX	Telluride	Nonhub	Colorado	1	0	-1	1	-	-1	37	-	-100.0%	703	-	-100.0%
<b>Average/Total - All Airports</b>			Colorado	<b>2</b>	<b>2</b>	<b>0</b>	<b>199</b>	<b>185</b>	<b>-14</b>	<b>26,507</b>	<b>24,862</b>	<b>-6.2%</b>	<b>2,869,372</b>	<b>2,797,948</b>	<b>-2.5%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Colorado	<b>2</b>	<b>2</b>	<b>0</b>	<b>42</b>	<b>40</b>	<b>-2</b>	<b>218</b>	<b>197</b>	<b>-9.7%</b>	<b>14,402</b>	<b>13,270</b>	<b>-7.9%</b>
BDL	Hartford	Medium	Connecticut	5	5	0	25	25	0	2,801	2,606	-7.0%	303,060	284,921	-6.0%
BDR	Bridgeport	Nonhub	Connecticut	0	0	0	-	-	0	-	-	-	-	-	-
HVN	New Haven	Nonhub	Connecticut	1	1	0	1	1	0	113	110	-2.7%	4,181	4,070	-2.7%
<b>Average/Total - All Airports</b>			Connecticut	<b>2</b>	<b>2</b>	<b>0</b>	<b>26</b>	<b>26</b>	<b>0</b>	<b>2,914</b>	<b>2,716</b>	<b>-6.8%</b>	<b>307,241</b>	<b>288,991</b>	<b>-5.9%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Connecticut	<b>1</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>1</b>	<b>0</b>	<b>113</b>	<b>110</b>	<b>-2.7%</b>	<b>4,181</b>	<b>4,070</b>	<b>-2.7%</b>
ILG	Wilmington, DE	Nonhub	Delaware	1	0	-1	7	-	-7	80	-	-100.0%	13,440	-	-100.0%

## Domestic Only

Airport	Airport Name	Hub Size	State	Number of Carriers			Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
FLL	Fort Lauderdale	Large	Florida	11	11	0	60	66	6	6,115	6,732	10.1%	879,387	968,973	10.2%
MCO	Orlando	Large	Florida	11	12	1	76	76	0	9,802	10,260	4.7%	1,453,380	1,547,786	6.5%
MIA	Miami	Large	Florida	4	6	2	51	56	5	6,866	7,321	6.6%	917,924	1,043,967	13.7%
TPA	Tampa	Large	Florida	9	9	0	63	64	1	5,673	6,009	5.9%	766,953	825,638	7.7%
JAX	Jacksonville, FL	Medium	Florida	6	7	1	25	26	1	2,676	2,666	-0.4%	273,937	278,867	1.8%
PBI	West Palm Beach	Medium	Florida	7	7	0	19	18	-1	1,617	1,759	8.8%	218,961	239,650	9.4%
RSW	Fort Myers	Medium	Florida	9	9	0	30	30	0	1,810	1,786	-1.3%	245,699	247,338	0.7%
ECP	Panama City, FL	Small	Florida	3	5	2	8	11	3	404	557	37.9%	49,244	56,541	14.8%
PIE	Tampa	Small	Florida	2	1	-1	32	42	10	293	449	53.2%	49,961	76,679	53.5%
PNS	Pensacola	Small	Florida	5	5	0	11	13	2	924	987	6.8%	85,180	86,981	2.1%
SFB	Orlando Sanford	Small	Florida	1	1	0	51	56	5	397	597	50.4%	68,047	101,522	49.2%
SRQ	Sarasota	Small	Florida	4	4	0	6	6	0	409	420	2.7%	47,386	46,422	-2.0%
APF	Naples (US)	Nonhub	Florida	1	1	0	1	1	0	17	17	0.0%	170	170	0.0%
DAB	Daytona Beach	Nonhub	Florida	2	2	0	2	2	0	243	234	-3.7%	30,701	26,843	-12.6%
DSJ	Destin, FL	Nonhub	Florida	1	1	0	5	4	-1	59	59	0.0%	590	590	0.0%
EYW	Key West	Nonhub	Florida	3	3	0	7	6	-1	523	597	14.1%	27,784	34,388	23.8%
GNV	Gainesville	Nonhub	Florida	3	3	0	5	4	-1	444	436	-1.8%	23,294	21,686	-6.9%
MLB	Melbourne, FL	Nonhub	Florida	2	2	0	2	2	0	206	220	6.8%	21,858	20,593	-5.8%
MTH	Marathon, FL	Nonhub	Florida	0	0	0	-	-	0	-	-	-	-	-	-
PFN	Panama City, FL	Nonhub	Florida	0	0	0	-	-	0	-	-	-	-	-	-
PGD	Punta Gorda, FL	Nonhub	Florida	1	1	0	17	22	5	129	225	74.4%	21,414	37,493	75.1%
TLH	Tallahassee	Nonhub	Florida	3	3	0	6	7	1	543	590	8.7%	36,188	39,035	7.9%
UST	St. Augustine, FL	Nonhub	Florida	1	2	1	1	2	1	13	22	69.2%	1,794	2,064	15.1%
VPS	Fort Walton Beach	Nonhub	Florida	3	3	0	5	5	0	579	587	1.4%	41,375	42,205	2.0%
<b>Average/Total - All Airports</b>			Florida	<b>4</b>	<b>4</b>	<b>0</b>	<b>483</b>	<b>519</b>	<b>36</b>	<b>39,742</b>	<b>42,530</b>	7.0%	<b>5,261,227</b>	<b>5,745,431</b>	9.2%
<b>Average/Total - Small, Nonhub and EAS</b>			Florida	<b>2</b>	<b>2</b>	<b>0</b>	<b>159</b>	<b>183</b>	<b>24</b>	<b>5,183</b>	<b>5,997</b>	15.7%	<b>504,986</b>	<b>593,212</b>	17.5%
ATL	Atlanta	Large	Georgia	8	7	-1	167	158	-9	33,183	34,527	4.1%	4,310,851	4,554,111	5.6%
SAV	Savannah	Small	Georgia	4	6	2	13	17	4	1,289	1,299	0.8%	105,692	107,791	2.0%
ABY	Albany, GA	Nonhub	Georgia	1	1	0	1	1	0	86	80	-7.0%	4,300	4,000	-7.0%
AGS	Augusta, GA	Nonhub	Georgia	2	2	0	2	2	0	418	424	1.4%	26,596	26,411	-0.7%
AHN	Athens (US)	Nonhub	Georgia	1	0	-1	1	-	-1	52	-	-100.0%	468	-	-100.0%
BQK	Brunswick	Nonhub	Georgia	1	1	0	1	1	0	88	80	-9.1%	4,400	4,000	-9.1%
CSG	Columbus, GA	Nonhub	Georgia	1	1	0	1	1	0	116	102	-12.1%	5,800	5,100	-12.1%
MCN	Macon	EAS	Georgia	1	0	-1	2	-	-2	52	-	-100.0%	1,768	-	-100.0%
PDK	Atlanta	Nonhub	Georgia	1	1	0	2	3	1	39	43	10.3%	390	430	10.3%
VLD	Valdosta	Nonhub	Georgia	1	1	0	1	1	0	87	87	0.0%	4,350	4,350	0.0%
<b>Average/Total - All Airports</b>			Georgia	<b>2</b>	<b>2</b>	<b>0</b>	<b>191</b>	<b>184</b>	<b>-7</b>	<b>35,410</b>	<b>36,642</b>	3.5%	<b>4,464,615</b>	<b>4,706,193</b>	5.4%
<b>Average/Total - Small, Nonhub and EAS</b>			Georgia	<b>1</b>	<b>1</b>	<b>0</b>	<b>24</b>	<b>26</b>	<b>2</b>	<b>2,227</b>	<b>2,115</b>	-5.0%	<b>153,764</b>	<b>152,082</b>	-1.1%
HNL	Honolulu	Large	Hawaii	8	8	0	34	30	-4	5,667	5,452	-3.8%	776,865	782,008	0.7%
OGG	Kahului	Medium	Hawaii	7	7	0	21	21	0	3,473	3,293	-5.2%	335,220	355,972	6.2%
ITO	Hilo	Small	Hawaii	2	2	0	3	3	0	553	619	11.9%	65,673	74,207	13.0%
KOA	Kona	Small	Hawaii	6	6	0	10	11	1	1,696	1,638	-3.4%	158,068	175,657	11.1%
LIH	Kauai Island	Small	Hawaii	6	5	-1	10	9	-1	1,217	1,062	-12.7%	158,271	153,346	-3.1%
<b>Average/Total - All Airports</b>			Hawaii	<b>6</b>	<b>6</b>	<b>0</b>	<b>78</b>	<b>74</b>	<b>-4</b>	<b>12,606</b>	<b>12,064</b>	-4.3%	<b>1,494,097</b>	<b>1,541,190</b>	3.2%
<b>Average/Total - Small Hub ONLY</b>			Hawaii	<b>5</b>	<b>4</b>	<b>0</b>	<b>23</b>	<b>23</b>	<b>0</b>	<b>3,466</b>	<b>3,319</b>	-4.2%	<b>382,012</b>	<b>403,210</b>	5.5%

### Domestic Only

Airport	Airport Name	Hub Size	State	Number of Carriers			Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
BOI	Boise	Small	Idaho	6	6	0	18	18	0	1,677	1,853	10.5%	162,769	172,568	6.0%
SUN	Sun Valley	Nonhub	Idaho	3	3	0	5	5	0	207	190	-8.2%	14,427	13,322	-7.7%
IDA	Idaho Falls	Nonhub	Idaho	4	3	-1	7	7	0	359	292	-18.7%	24,184	20,368	-15.8%
LWS	Lewiston	Nonhub	Idaho	2	2	0	4	4	0	150	153	2.0%	9,840	10,068	2.3%
MYL	McCall, ID	Nonhub	Idaho	0	0	0	-	-	0	-	-	-	-	-	-
PIH	Pocatello	Nonhub	Idaho	1	1	0	1	1	0	114	70	-38.6%	3,420	3,500	2.3%
SMN	Salmon, ID	Nonhub	Idaho	0	0	0	-	-	0	-	-	-	-	-	-
TWF	Twin Falls	Nonhub	Idaho	1	1	0	1	1	0	61	88	44.3%	3,050	4,400	44.3%
<b>Average/Total - All Airports</b>			Idaho	<b>2</b>	<b>2</b>	<b>0</b>	<b>36</b>	<b>36</b>	<b>0</b>	<b>2,568</b>	<b>2,646</b>	3.0%	<b>217,690</b>	<b>224,226</b>	3.0%
<b>Average/Total - Small, Nonhub and EAS</b>			Idaho	<b>2</b>	<b>2</b>	<b>0</b>	<b>36</b>	<b>36</b>	<b>0</b>	<b>2,568</b>	<b>2,646</b>	3.0%	<b>217,690</b>	<b>224,226</b>	3.0%
MDW	Chicago Midway	Large	Illinois	6	5	-1	72	71	-1	8,201	8,202	0.0%	1,171,792	1,183,296	1.0%
ORD	Chicago O'Hare	Large	Illinois	8	9	1	160	161	1	35,189	34,229	-2.7%	3,142,931	3,347,666	6.5%
DEC	Decatur	EAS	Illinois	1	1	0	2	2	0	156	156	0.0%	1,248	1,248	0.0%
BLV	Belleville	Nonhub	Illinois	1	1	0	1	2	1	3	14	366.7%	498	2,335	368.9%
BMI	Bloomington	Nonhub	Illinois	4	3	-1	7	7	0	337	295	-12.5%	21,334	20,112	-5.7%
CMI	Champaign	Nonhub	Illinois	1	1	0	2	2	0	208	195	-6.3%	10,214	9,738	-4.7%
MLI	Moline	Nonhub	Illinois	4	4	0	10	10	0	678	639	-5.8%	40,319	39,733	-1.5%
MWA	Marion	EAS	Illinois	1	1	0	1	1	0	156	156	0.0%	1,404	1,404	0.0%
PIA	Peoria	Nonhub	Illinois	4	4	0	10	11	1	592	578	-2.4%	35,043	34,705	-1.0%
PWK	Chicago	Nonhub	Illinois	0	0	0	-	-	0	-	-	-	-	-	-
RFD	Chicago	Nonhub	Illinois	1	1	0	5	5	0	42	45	7.1%	6,992	7,391	5.7%
SPI	Springfield	Nonhub	Illinois	3	3	0	4	4	0	160	163	1.9%	8,928	9,310	4.3%
UIN	Quincy	EAS	Illinois	1	1	0	1	1	0	157	159	1.3%	1,413	1,431	1.3%
<b>Average/Total - All Airports</b>			Illinois	<b>3</b>	<b>3</b>	<b>0</b>	<b>275</b>	<b>277</b>	<b>2</b>	<b>45,879</b>	<b>44,831</b>	-2.3%	<b>4,442,116</b>	<b>4,658,369</b>	4.9%
<b>Average/Total - Small, Nonhub and EAS</b>			Illinois	<b>2</b>	<b>2</b>	<b>0</b>	<b>43</b>	<b>45</b>	<b>2</b>	<b>2,489</b>	<b>2,400</b>	-3.6%	<b>127,393</b>	<b>127,407</b>	0.0%
IND	Indianapolis	Medium	Indiana	5	7	2	32	37	5	3,986	4,217	5.8%	378,245	434,705	14.9%
EVV	Evansville	Nonhub	Indiana	2	3	1	4	5	1	362	502	38.7%	18,280	28,174	54.1%
FWA	Fort Wayne	Nonhub	Indiana	4	4	0	10	12	2	562	657	16.9%	33,127	38,363	15.8%
SBN	South Bend	Nonhub	Indiana	3	3	0	11	10	-1	530	505	-4.7%	31,819	31,918	0.3%
<b>Average/Total - All Airports</b>			Indiana	<b>4</b>	<b>4</b>	<b>1</b>	<b>57</b>	<b>64</b>	<b>7</b>	<b>5,440</b>	<b>5,881</b>	8.1%	<b>461,471</b>	<b>533,160</b>	15.5%
<b>Average/Total - Small, Nonhub and EAS</b>			Indiana	<b>3</b>	<b>3</b>	<b>0</b>	<b>25</b>	<b>27</b>	<b>2</b>	<b>1,454</b>	<b>1,664</b>	14.4%	<b>83,226</b>	<b>98,455</b>	18.3%
CID	Cedar Rapids	Small	Iowa	5	5	0	12	12	0	957	945	-1.3%	58,562	58,700	0.2%
DSM	Des Moines	Small	Iowa	6	6	0	18	18	0	1,529	1,361	-11.0%	121,931	118,000	-3.2%
ALO	Waterloo	EAS	Iowa	1	1	0	1	1	0	57	57	0.0%	2,850	2,850	0.0%
BRL	Burlington (US) IA	EAS	Iowa	1	1	0	2	2	0	109	109	0.0%	872	872	0.0%
DBQ	Dubuque	Nonhub	Iowa	1	1	0	1	1	0	84	88	4.8%	4,200	4,400	4.8%
FOD	Fort Dodge	EAS	Iowa	0	1	1	-	2	2	-	125	-	-	1,000	-
MCW	Mason City	EAS	Iowa	0	1	1	-	2	2	-	125	-	-	1,000	-
SUX	Sioux City	EAS	Iowa	2	1	-1	2	1	-1	70	57	-18.6%	4,644	2,850	-38.6%
<b>Average/Total - All Airports</b>			Iowa	<b>2</b>	<b>2</b>	<b>0</b>	<b>36</b>	<b>39</b>	<b>3</b>	<b>2,806</b>	<b>2,867</b>	2.2%	<b>193,059</b>	<b>189,672</b>	-1.8%
<b>Average/Total - Small, Nonhub and EAS</b>			Iowa	<b>2</b>	<b>2</b>	<b>0</b>	<b>36</b>	<b>39</b>	<b>3</b>	<b>2,806</b>	<b>2,867</b>	2.2%	<b>193,059</b>	<b>189,672</b>	-1.8%

## Domestic Only

Airport	Airport Name	Hub Size	State	Number of Carriers			Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
ICT	Wichita	Small	Kansas	6	5	-1	12	11	-1	1,083	1,065	-1.7%	90,978	91,098	0.1%
DDC	Dodge City	EAS	Kansas	1	1	0	2	2	0	62	83	33.9%	558	1,188	112.9%
FOE	Topeka	Nonhub	Kansas	1	0	-1	1	-	-1	56	-	-100.0%	2,800	-	-100.0%
GBD	Great Bend	EAS	Kansas	1	1	0	2	1	-1	78	25	-67.9%	702	225	-67.9%
GCK	Garden City	EAS	Kansas	1	1	0	1	1	0	61	62	1.6%	2,942	3,100	5.4%
HYS	Hays	EAS	Kansas	1	1	0	1	1	0	51	52	2.0%	2,550	2,600	2.0%
LBL	Liberal	EAS	Kansas	1	1	0	1	1	0	61	83	36.1%	549	1,293	135.5%
MHK	Manhattan	Nonhub	Kansas	1	1	0	2	2	0	153	155	1.3%	7,482	7,564	1.1%
SLN	Salina	EAS	Kansas	1	1	0	2	1	-1	104	78	-25.0%	936	702	-25.0%
<b>Average/Total - All Airports</b>			Kansas	<b>2</b>	<b>1</b>	<b>0</b>	<b>24</b>	<b>20</b>	<b>-4</b>	<b>1,709</b>	<b>1,603</b>	<b>-6.2%</b>	<b>109,497</b>	<b>107,770</b>	<b>-1.6%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Kansas	<b>2</b>	<b>1</b>	<b>0</b>	<b>24</b>	<b>20</b>	<b>-4</b>	<b>1,709</b>	<b>1,603</b>	<b>-6.2%</b>	<b>109,497</b>	<b>107,770</b>	<b>-1.6%</b>
LEX	Lexington	Small	Kentucky	4	4	0	15	15	0	1,073	1,052	-2.0%	67,919	68,476	0.8%
SDF	Louisville	Small	Kentucky	4	4	0	21	20	-1	2,164	2,178	0.6%	183,814	186,960	1.7%
OWB	Owensboro	EAS	Kentucky	2	2	0	2	2	0	91	92	1.1%	2,623	2,712	3.4%
PAH	Paducah	EAS	Kentucky	1	1	0	1	1	0	62	62	0.0%	3,100	3,100	0.0%
<b>Average/Total - All Airports</b>			Kentucky	<b>3</b>	<b>3</b>	<b>0</b>	<b>39</b>	<b>38</b>	<b>-1</b>	<b>3,390</b>	<b>3,384</b>	<b>-0.2%</b>	<b>257,456</b>	<b>261,248</b>	<b>1.5%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Kentucky	<b>3</b>	<b>3</b>	<b>0</b>	<b>39</b>	<b>38</b>	<b>-1</b>	<b>3,390</b>	<b>3,384</b>	<b>-0.2%</b>	<b>257,456</b>	<b>261,248</b>	<b>1.5%</b>
MSY	New Orleans	Medium	Louisiana	8	10	2	37	38	1	4,044	4,117	1.8%	494,451	525,673	6.3%
AEX	Alexandria, LA	Nonhub	Louisiana	3	3	0	3	3	0	295	295	0.0%	14,508	14,750	1.7%
BTR	Baton Rouge	Nonhub	Louisiana	3	3	0	4	4	0	786	730	-7.1%	41,843	40,942	-2.2%
LCH	Lake Charles	Nonhub	Louisiana	2	2	0	2	2	0	172	198	15.1%	8,119	9,887	21.8%
LFT	Lafayette	Nonhub	Louisiana	3	3	0	4	4	0	560	519	-7.3%	29,795	28,756	-3.5%
MLU	Monroe	Nonhub	Louisiana	3	3	0	3	3	0	288	286	-0.7%	13,880	14,300	3.0%
NEW	New Orleans, LA	Nonhub	Louisiana	1	1	0	1	2	1	10	27	170.0%	100	270	170.0%
SHV	Shreveport	Nonhub	Louisiana	4	4	0	6	6	0	605	602	-0.5%	33,104	34,535	4.3%
<b>Average/Total - All Airports</b>			Louisiana	<b>3</b>	<b>4</b>	<b>0</b>	<b>60</b>	<b>62</b>	<b>2</b>	<b>6,760</b>	<b>6,774</b>	<b>0.2%</b>	<b>635,800</b>	<b>669,113</b>	<b>5.2%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Louisiana	<b>3</b>	<b>3</b>	<b>0</b>	<b>23</b>	<b>24</b>	<b>1</b>	<b>2,716</b>	<b>2,657</b>	<b>-2.2%</b>	<b>141,349</b>	<b>143,440</b>	<b>1.5%</b>
PWM	Portland, ME	Small	Maine	5	5	0	12	12	0	1,307	1,367	4.6%	108,145	114,875	6.2%
AUG	Augusta (US) ME	EAS	Maine	1	1	0	1	1	0	124	124	0.0%	1,116	1,116	0.0%
BGR	Bangor	Nonhub	Maine	4	4	0	7	7	0	495	498	0.6%	32,501	35,380	8.9%
BHB	Bar Harbor	EAS	Maine	2	2	0	1	1	0	93	93	0.0%	2,387	2,387	0.0%
PQI	Presque Isle	EAS	Maine	1	1	0	1	1	0	83	83	0.0%	2,822	2,822	0.0%
RKD	Rockland	EAS	Maine	1	1	0	1	1	0	155	186	20.0%	1,395	1,674	20.0%
<b>Average/Total - All Airports</b>			Maine	<b>2</b>	<b>2</b>	<b>0</b>	<b>23</b>	<b>23</b>	<b>0</b>	<b>2,257</b>	<b>2,351</b>	<b>4.2%</b>	<b>148,366</b>	<b>158,254</b>	<b>6.7%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Maine	<b>2</b>	<b>2</b>	<b>0</b>	<b>23</b>	<b>23</b>	<b>0</b>	<b>2,257</b>	<b>2,351</b>	<b>4.2%</b>	<b>148,366</b>	<b>158,254</b>	<b>6.7%</b>
BWI	Baltimore	Large	Maryland	6	7	1	66	67	1	8,790	8,975	2.1%	1,207,064	1,261,511	4.5%
HGR	Hagerstown	EAS	Maryland	2	2	0	2	3	1	108	118	9.3%	1,600	3,408	113.0%
SBY	Salisbury	Nonhub	Maryland	1	1	0	2	2	0	180	179	-0.6%	7,453	7,429	-0.3%
<b>Average/Total - All Airports</b>			Maryland	<b>3</b>	<b>3</b>	<b>0</b>	<b>70</b>	<b>72</b>	<b>2</b>	<b>9,078</b>	<b>9,272</b>	<b>2.1%</b>	<b>1,216,117</b>	<b>1,272,348</b>	<b>4.6%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Maryland	<b>2</b>	<b>2</b>	<b>0</b>	<b>4</b>	<b>5</b>	<b>1</b>	<b>288</b>	<b>297</b>	<b>3.1%</b>	<b>9,053</b>	<b>10,837</b>	<b>19.7%</b>

### Domestic Only

Airport	Airport Name	Hub Size	State	Number of Carriers			Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
BOS	Boston	Large	Massachusetts	11	11	0	71	74	3	14,012	14,579	4.0%	1,484,316	1,576,015	6.2%
ACK	Nantucket	Nonhub	Massachusetts	7	6	-1	11	9	-2	2,501	2,179	-12.9%	42,306	38,869	-8.1%
BED	Bedford/Hanscom	Nonhub	Massachusetts	0	0	0	-	-	0	-	-	-	-	-	-
CEF	Springfield, MA	Nonhub	Massachusetts	0	0	0	-	-	0	-	-	-	-	-	-
EWB	New Bedford	Nonhub	Massachusetts	1	1	0	2	2	0	315	279	-11.4%	2,835	2,511	-11.4%
HYA	Hyannis	Nonhub	Massachusetts	3	3	0	5	5	0	1,095	854	-22.0%	13,096	10,856	-17.1%
MVY	Martha's Vineyard	Nonhub	Massachusetts	5	4	-1	10	9	-1	1,033	862	-16.6%	18,394	17,049	-7.3%
ORH	Worcester	Nonhub	Massachusetts	1	1	0	2	2	0	62	62	0.0%	6,200	6,200	0.0%
PVC	Provincetown	Nonhub	Massachusetts	1	1	0	2	2	0	370	367	-0.8%	3,330	3,303	-0.8%
<b>Average/Total - All Airports</b>			Massachusetts	<b>3</b>	<b>3</b>	<b>0</b>	<b>103</b>	<b>103</b>	<b>0</b>	<b>19,388</b>	<b>19,182</b>	-1.1%	<b>1,570,477</b>	<b>1,654,803</b>	5.4%
<b>Average/Total - Small, Nonhub and EAS</b>			Massachusetts	<b>2</b>	<b>2</b>	<b>0</b>	<b>32</b>	<b>29</b>	<b>-3</b>	<b>5,376</b>	<b>4,603</b>	-14.4%	<b>86,161</b>	<b>78,788</b>	-8.6%
DTW	Detroit	Large	Michigan	7	8	1	117	109	-8	15,708	15,249	-2.9%	1,513,926	1,602,854	5.9%
FNT	Flint	Small	Michigan	4	4	0	7	7	0	467	466	-0.2%	43,108	43,265	0.4%
GRR	Grand Rapids	Small	Michigan	5	5	0	19	21	2	1,431	1,533	7.1%	121,311	135,394	11.6%
APN	Alpena	EAS	Michigan	1	1	0	2	1	-1	52	52	0.0%	2,600	2,600	0.0%
AZO	Kalamazoo	Nonhub	Michigan	2	2	0	4	3	-1	354	284	-19.8%	17,700	16,374	-7.5%
CIU	Sault Ste Marie (US)	EAS	Michigan	1	1	0	1	1	0	56	62	10.7%	2,800	3,100	10.7%
CMX	Hancock	EAS	Michigan	1	1	0	1	1	0	62	62	0.0%	3,100	3,100	0.0%
ESC	Escanaba	EAS	Michigan	1	1	0	1	1	0	52	52	0.0%	2,600	2,600	0.0%
IMT	Iron Mountain	EAS	Michigan	1	1	0	2	2	0	57	57	0.0%	2,850	2,850	0.0%
IWD	Ironwood	EAS	Michigan	1	1	0	1	1	0	78	78	0.0%	624	624	0.0%
LAN	Lansing	Nonhub	Michigan	4	3	-1	6	4	-2	377	347	-8.0%	23,410	22,760	-2.8%
MBL	Manistee	EAS	Michigan	1	1	0	1	2	1	49	51	4.1%	997	1,530	53.5%
MBS	Saginaw	Nonhub	Michigan	2	2	0	4	3	-1	317	280	-11.7%	15,850	15,144	-4.5%
MKG	Muskegon	EAS	Michigan	1	1	0	1	1	0	62	62	0.0%	3,100	3,100	0.0%
MQT	Marquette	Nonhub	Michigan	2	2	0	2	2	0	85	85	0.0%	4,250	4,250	0.0%
PLN	Pellston	EAS	Michigan	1	2	1	1	2	1	109	103	-5.5%	5,450	4,976	-8.7%
TVC	Traverse City	Nonhub	Michigan	3	3	0	7	7	0	533	590	10.7%	37,809	41,735	10.4%
<b>Average/Total - All Airports</b>			Michigan	<b>2</b>	<b>2</b>	<b>0</b>	<b>177</b>	<b>168</b>	<b>-9</b>	<b>19,849</b>	<b>19,413</b>	-2.2%	<b>1,801,485</b>	<b>1,906,256</b>	5.8%
<b>Average/Total - Small, Nonhub and EAS</b>			Michigan	<b>2</b>	<b>2</b>	<b>0</b>	<b>60</b>	<b>59</b>	<b>-1</b>	<b>4,141</b>	<b>4,164</b>	0.6%	<b>287,559</b>	<b>303,402</b>	5.5%
MSP	Minneapolis/St. Paul	Large	Minnesota	9	9	0	119	120	1	15,872	15,899	0.2%	1,764,594	1,842,497	4.4%
BJI	Bemidji	EAS	Minnesota	1	1	0	1	1	0	62	62	0.0%	3,100	3,100	0.0%
BRD	Brainerd	EAS	Minnesota	1	1	0	2	1	-1	79	60	-24.1%	3,950	3,000	-24.1%
DLH	Duluth	Nonhub	Minnesota	3	2	-1	4	2	-2	313	263	-16.0%	19,343	17,326	-10.4%
HIB	Hibbing/Chisholm	EAS	Minnesota	1	1	0	1	2	1	53	82	54.7%	2,650	4,100	54.7%
INL	International Falls	EAS	Minnesota	1	1	0	2	2	0	62	54	-12.9%	3,100	2,700	-12.9%
RST	Rochester, MN	Nonhub	Minnesota	2	2	0	2	3	1	256	235	-8.2%	12,410	13,092	5.5%
STC	St Cloud	Nonhub	Minnesota	2	1	-1	2	1	-1	69	7	-89.9%	4,192	1,092	-74.0%
TVF	Thief River Falls	EAS	Minnesota	0	1	1	-	1	1	-	62	-	-	558	-
<b>Average/Total - All Airports</b>			Minnesota	<b>2</b>	<b>2</b>	<b>0</b>	<b>133</b>	<b>133</b>	<b>0</b>	<b>16,766</b>	<b>16,724</b>	-0.3%	<b>1,813,339</b>	<b>1,887,465</b>	4.1%
<b>Average/Total - Small, Nonhub and EAS</b>			Minnesota	<b>1</b>	<b>1</b>	<b>0</b>	<b>14</b>	<b>13</b>	<b>-1</b>	<b>894</b>	<b>825</b>	-7.7%	<b>48,745</b>	<b>44,968</b>	-7.7%

### Domestic Only

Airport	Airport Name	Hub Size	State	Number of Carriers			Nonstop Routes			Scheduled Departures			Scheduled Seats			
				Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.	
JAN	Jackson, MS	Small	Mississippi	3	3	0	6	6	0	794	836	5.3%	53,167	57,241	7.7%	
DXE	Madison, MS	Nonhub	Mississippi	0	1	1	-	3	3	-	36	-	-	-	360	-
GLH	Greenville (US) MS	Nonhub	Mississippi	1	1	0	1	1	0	52	78	50.0%	1,768	702	-60.3%	
GPT	Gulfport/Biloxi	Nonhub	Mississippi	4	4	0	5	5	0	475	385	-18.9%	32,015	26,684	-16.7%	
GTR	Columbus	Nonhub	Mississippi	1	1	0	1	1	0	87	88	1.1%	4,350	4,400	1.1%	
MEI	Meridian	EAS	Mississippi	1	1	0	1	2	1	52	83	59.6%	1,768	4,150	134.7%	
OLV	Olive Branch, MS	Nonhub	Mississippi	1	1	0	3	4	1	58	32	-44.8%	580	320	-44.8%	
PIB	Laurel	EAS	Mississippi	1	1	0	1	2	1	52	52	0.0%	1,768	2,600	47.1%	
TUP	Tupelo	EAS	Mississippi	1	1	0	2	2	0	104	130	25.0%	3,536	1,170	-66.9%	
<b>Average/Total - All Airports</b>			Mississippi	<b>1</b>	<b>2</b>	<b>0</b>	<b>20</b>	<b>26</b>	<b>6</b>	<b>1,674</b>	<b>1,720</b>	<b>2.7%</b>	<b>98,952</b>	<b>97,627</b>	<b>-1.3%</b>	
<b>Average/Total - Small, Nonhub and EAS</b>			Mississippi	<b>1</b>	<b>2</b>	<b>0</b>	<b>20</b>	<b>26</b>	<b>6</b>	<b>1,674</b>	<b>1,720</b>	<b>2.7%</b>	<b>98,952</b>	<b>97,627</b>	<b>-1.3%</b>	
MCI	Kansas City	Medium	Missouri	8	8	0	41	42	1	5,091	4,735	-7.0%	578,345	569,313	-1.6%	
STL	St. Louis	Medium	Missouri	8	8	0	57	58	1	7,004	7,017	0.2%	709,853	701,042	-1.2%	
SGF	Springfield, MO	Small	Missouri	4	4	0	10	10	0	692	727	5.1%	41,053	49,647	20.9%	
BKG	Branson	Nonhub	Missouri	2	1	-1	3	6	3	85	60	-29.4%	5,844	5,340	-8.6%	
CGI	Cape Girardeau	EAS	Missouri	1	1	0	1	1	0	104	104	0.0%	936	936	0.0%	
COU	Columbia, MO	Nonhub	Missouri	1	1	0	2	2	0	122	122	0.0%	5,626	6,880	22.3%	
IRK	Kirksville	EAS	Missouri	1	1	0	1	1	0	93	93	0.0%	837	837	0.0%	
JLN	Joplin	EAS	Missouri	1	1	0	1	1	0	59	62	5.1%	2,950	3,100	5.1%	
TBN	Fort Leonard Wood	EAS	Missouri	1	1	0	1	1	0	129	128	-0.8%	1,161	1,152	-0.8%	
<b>Average/Total - All Airports</b>			Missouri	<b>3</b>	<b>3</b>	<b>0</b>	<b>117</b>	<b>122</b>	<b>5</b>	<b>13,379</b>	<b>13,048</b>	<b>-2.5%</b>	<b>1,346,605</b>	<b>1,338,247</b>	<b>-0.6%</b>	
<b>Average/Total - Small, Nonhub and EAS</b>			Missouri	<b>2</b>	<b>1</b>	<b>0</b>	<b>117</b>	<b>122</b>	<b>5</b>	<b>13,379</b>	<b>13,048</b>	<b>-2.5%</b>	<b>1,346,605</b>	<b>1,338,247</b>	<b>-0.6%</b>	
BIL	Billings	Small	Montana	5	5	0	15	14	-1	953	875	-8.2%	55,909	51,507	-7.9%	
BZN	Bozeman	Small	Montana	5	5	0	14	14	0	767	689	-10.2%	76,718	68,404	-10.8%	
BTM	Butte	EAS	Montana	1	1	0	1	1	0	74	62	-16.2%	3,700	3,100	-16.2%	
FCA	Kalispell	Nonhub	Montana	4	4	0	10	10	0	524	502	-4.2%	42,696	42,642	-0.1%	
GDV	Glendive	EAS	Montana	1	1	0	1	1	0	62	62	0.0%	558	558	0.0%	
GGW	Glasgow (US)	EAS	Montana	1	1	0	1	1	0	62	62	0.0%	558	558	0.0%	
GTF	Great Falls	Nonhub	Montana	5	4	-1	8	7	-1	376	337	-10.4%	27,414	22,642	-17.4%	
HLN	Helena	Nonhub	Montana	3	3	0	5	5	0	211	199	-5.7%	12,968	12,179	-6.1%	
HVR	Havre	EAS	Montana	1	1	0	1	1	0	62	25	-59.7%	558	225	-59.7%	
LWT	Lewistown, MT	Nonhub	Montana	0	0	0	-	-	0	-	-	-	-	-	-	
MLS	Miles City, MT	Nonhub	Montana	0	0	0	-	-	0	-	-	-	-	-		
MSO	Missoula	Nonhub	Montana	5	5	0	12	12	0	691	515	-25.5%	53,486	42,774	-20.0%	
OLF	Wolf Point	EAS	Montana	1	1	0	1	1	0	62	62	0.0%	558	558	0.0%	
SDY	Sidney	EAS	Montana	1	1	0	1	1	0	155	155	0.0%	1,395	1,395	0.0%	
WYS	West Yellowstone	EAS	Montana	1	1	0	1	1	0	72	54	-25.0%	2,160	2,700	25.0%	
<b>Average/Total - All Airports</b>			Montana	<b>2</b>	<b>2</b>	<b>0</b>	<b>71</b>	<b>69</b>	<b>-2</b>	<b>4,071</b>	<b>3,599</b>	<b>-11.6%</b>	<b>278,678</b>	<b>249,242</b>	<b>-10.6%</b>	
<b>Average/Total - Small, Nonhub and EAS</b>			Montana	<b>2</b>	<b>2</b>	<b>0</b>	<b>71</b>	<b>69</b>	<b>-2</b>	<b>4,071</b>	<b>3,599</b>	<b>-11.6%</b>	<b>278,678</b>	<b>249,242</b>	<b>-10.6%</b>	
OMA	Omaha	Medium	Nebraska	6	7	1	19	22	3	2,098	2,045	-2.5%	219,567	214,275	-2.4%	
AIA	Alliance	EAS	Nebraska	1	0	-1	1	-	-1	26	-	-100.0%	234	-	-100.0%	
BFF	Scottsbluff	EAS	Nebraska	1	1	0	1	2	1	69	93	34.8%	621	2,790	349.3%	
CDR	Chadron	EAS	Nebraska	1	0	-1	1	-	-1	26	-	-100.0%	234	-	-100.0%	
EAR	Kearney	EAS	Nebraska	1	1	0	1	1	0	88	62	-29.5%	2,262	1,860	-17.8%	
GRI	Grand Island	EAS	Nebraska	2	2	0	3	3	0	74	75	1.4%	5,650	5,768	2.1%	
LBF	North Platte	EAS	Nebraska	1	1	0	1	1	0	68	62	-8.8%	612	1,860	203.9%	
LNK	Lincoln	Nonhub	Nebraska	2	2	0	3	4	1	283	322	13.8%	14,150	16,999	20.1%	
MCK	Mccook	EAS	Nebraska	1	1	0	1	1	0	21	21	0.0%	189	189	0.0%	
<b>Average/Total - All Airports</b>			Nebraska	<b>2</b>	<b>2</b>	<b>0</b>	<b>31</b>	<b>34</b>	<b>3</b>	<b>2,753</b>	<b>2,680</b>	<b>-2.7%</b>	<b>243,519</b>	<b>243,741</b>	<b>0.1%</b>	
<b>Average/Total - Small, Nonhub and EAS</b>			Nebraska	<b>1</b>	<b>1</b>	<b>0</b>	<b>12</b>	<b>12</b>	<b>0</b>	<b>655</b>	<b>635</b>	<b>-3.1%</b>	<b>23,952</b>	<b>29,466</b>	<b>23.0%</b>	

## Domestic Only

Airport	Airport Name	Hub Size	State	Number of Carriers			Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
LAS	Las Vegas	Large	Nevada	12	12	0	113	113	0	13,305	13,562	1.9%	1,987,662	2,095,890	5.4%
RNO	Reno	Small	Nevada	6	7	1	15	16	1	1,775	1,702	-4.1%	188,749	199,469	5.7%
BLD	Las Vegas	Nonhub	Nevada	1	1	0	1	1	0	31	31	0.0%	186	186	0.0%
EKO	Elko	Nonhub	Nevada	1	1	0	1	1	0	81	30	-63.0%	2,430	1,500	-38.3%
ELY	Ely, NV	Nonhub	Nevada	0	0	0	-	-	0	-	-	-	-	-	-
<b>Average/Total - All Airports</b>			Nevada	<b>4</b>	<b>4</b>	<b>0</b>	<b>130</b>	<b>131</b>	<b>1</b>	<b>15,192</b>	<b>15,325</b>	<b>0.9%</b>	<b>2,179,027</b>	<b>2,297,045</b>	<b>5.4%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Nevada	<b>2</b>	<b>2</b>	<b>0</b>	<b>17</b>	<b>18</b>	<b>1</b>	<b>1,887</b>	<b>1,763</b>	<b>-6.6%</b>	<b>191,365</b>	<b>201,155</b>	<b>5.1%</b>
MHT	Manchester, NH	Small	New Hampshire	4	4	0	13	13	0	1,185	1,178	-0.6%	114,481	113,670	-0.7%
LEB	Lebanon	EAS	New Hampshire	1	1	0	2	2	0	192	186	-3.1%	1,728	1,674	-3.1%
PSM	Portsmouth, NH	Nonhub	New Hampshire	1	1	0	1	1	0	3	5	66.7%	498	830	66.7%
<b>Average/Total - All Airports</b>			New Hampshire	<b>2</b>	<b>2</b>	<b>0</b>	<b>16</b>	<b>16</b>	<b>0</b>	<b>1,380</b>	<b>1,369</b>	<b>-0.8%</b>	<b>116,707</b>	<b>116,174</b>	<b>-0.5%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			New Hampshire	<b>2</b>	<b>2</b>	<b>0</b>	<b>16</b>	<b>16</b>	<b>0</b>	<b>1,380</b>	<b>1,369</b>	<b>-0.8%</b>	<b>116,707</b>	<b>116,174</b>	<b>-0.5%</b>
EWR	New York Newark	Large	New Jersey	7	7	0	84	83	-1	12,903	13,052	1.2%	1,297,798	1,362,644	5.0%
ACY	Atlantic City	Small	New Jersey	2	2	0	10	11	1	403	396	-1.7%	57,660	60,996	5.8%
MMU	Morristown	Nonhub	New Jersey	1	1	0	2	2	0	33	34	3.0%	990	1,020	3.0%
TTN	Philadelphia	Nonhub	New Jersey	1	1	0	17	11	-6	318	279	-12.3%	43,884	38,502	-12.3%
<b>Average/Total - All Airports</b>			New Jersey	<b>3</b>	<b>3</b>	<b>0</b>	<b>113</b>	<b>107</b>	<b>-6</b>	<b>13,657</b>	<b>13,761</b>	<b>0.8%</b>	<b>1,400,332</b>	<b>1,463,162</b>	<b>4.5%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			New Jersey	<b>1</b>	<b>1</b>	<b>0</b>	<b>29</b>	<b>24</b>	<b>-5</b>	<b>754</b>	<b>709</b>	<b>-6.0%</b>	<b>102,534</b>	<b>100,518</b>	<b>-2.0%</b>
ABQ	Albuquerque	Medium	New Mexico	6	7	1	24	25	1	2,568	2,381	-7.3%	288,387	272,685	-5.4%
ALM	Alamogordo, NM	Nonhub	New Mexico	0	0	0	-	-	0	-	-	-	-	-	-
CNM	Carlsbad	EAS	New Mexico	1	1	0	1	2	1	52	52	0.0%	520	468	-10.0%
CVN	Clovis	EAS	New Mexico	1	1	0	1	1	0	78	80	2.6%	702	720	2.6%
FMN	Farmington	Nonhub	New Mexico	1	1	0	3	3	0	104	119	14.4%	936	1,071	14.4%
GUP	Gallup, NM	Nonhub	New Mexico	0	0	0	-	-	0	-	-	-	-	-	-
HOB	Hobbs	Nonhub	New Mexico	1	1	0	1	1	0	52	51	-1.9%	2,600	2,550	-1.9%
ROW	Roswell	Nonhub	New Mexico	1	1	0	1	1	0	87	93	6.9%	4,212	4,650	10.4%
SAF	Santa Fe	Nonhub	New Mexico	2	2	0	3	3	0	202	201	-0.5%	9,812	9,588	-2.3%
SVC	Silver City	EAS	New Mexico	1	1	0	1	1	0	31	104	235.5%	279	936	235.5%
<b>Average/Total - All Airports</b>			New Mexico	<b>1</b>	<b>2</b>	<b>0</b>	<b>35</b>	<b>37</b>	<b>2</b>	<b>3,174</b>	<b>3,081</b>	<b>-2.9%</b>	<b>307,448</b>	<b>292,668</b>	<b>-4.8%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			New Mexico	<b>1</b>	<b>1</b>	<b>0</b>	<b>11</b>	<b>12</b>	<b>1</b>	<b>606</b>	<b>700</b>	<b>15.5%</b>	<b>19,061</b>	<b>19,983</b>	<b>4.8%</b>

### Domestic Only

Airport	Airport Name	Hub Size	State	Number of Carriers			Nonstop Routes			Scheduled Departures			Scheduled Seats			
				Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.	
JFK	New York Kennedy	Large	New York	7	7	0	64	63	-1	11,450	11,521	0.6%	1,400,791	1,468,286	4.8%	
LGA	New York LaGuardia	Large	New York	7	8	1	71	68	-3	14,794	14,881	0.6%	1,492,166	1,538,202	3.1%	
BUF	Buffalo	Medium	New York	5	5	0	19	19	0	2,779	2,629	-5.4%	270,677	261,524	-3.4%	
ALB	Albany, NY	Small	New York	5	5	0	18	19	1	1,635	1,620	-0.9%	132,114	135,724	2.7%	
HPN	Westchester County	Small	New York	6	5	-1	17	16	-1	1,584	1,293	-18.4%	85,779	79,645	-7.2%	
ISP	Long Island Islip	Small	New York	2	2	0	6	6	0	486	493	1.4%	59,058	59,407	0.6%	
ROC	Rochester, NY	Small	New York	5	5	0	16	16	0	1,665	1,587	-4.7%	128,867	124,498	-3.4%	
SYR	Syracuse	Small	New York	5	5	0	15	16	1	1,593	1,464	-8.1%	109,254	108,579	-0.6%	
ART	Watertown (US) NY	EAS	New York	1	1	0	1	1	0	61	62	1.6%	3,050	3,100	1.6%	
BGM	Binghamton	Nonhub	New York	3	3	0	3	3	0	283	242	-14.5%	11,836	10,020	-15.3%	
ELM	Elmira/Corning	Nonhub	New York	4	4	0	5	5	0	318	278	-12.6%	17,883	17,113	-4.3%	
FRG	Farmingdale	Nonhub	New York	0	1	1	-	1	1	-	18	-	-	540	-	-
HTO	East Hampton	Nonhub	New York	0	0	0	-	-	0	-	-	-	-	-	-	
IAG	Niagara Falls	Nonhub	New York	2	3	1	5	6	1	44	68	54.5%	7,661	9,241	20.6%	
ITH	Ithaca	Nonhub	New York	3	3	0	3	3	0	268	255	-4.9%	10,852	10,241	-5.6%	
JHW	Jamestown (US) NY	EAS	New York	1	1	0	2	1	-1	109	104	-4.6%	2,071	1,040	-49.8%	
JRB	New York, NY	Nonhub	New York	0	0	0	-	-	0	-	-	-	-	-	-	
MSS	Massena	EAS	New York	1	1	0	1	1	0	93	93	0.0%	837	837	0.0%	
OGS	Ogdensburg	EAS	New York	1	1	0	1	1	0	93	93	0.0%	837	837	0.0%	
PBG	Plattsburgh	EAS	New York	3	3	0	5	5	0	126	131	4.0%	14,111	14,974	6.1%	
SLK	Saranac Lake	EAS	New York	1	1	0	2	1	-1	96	93	-3.1%	864	837	-3.1%	
SWF	Newburgh	Nonhub	New York	4	4	0	5	5	0	266	253	-4.9%	16,500	15,516	-6.0%	
TSS	East 34th Street Heliport, NY	Nonhub	New York	0	0	0	-	-	0	-	-	-	-	-	-	
<b>Average/Total - All Airports</b>			New York	<b>3</b>	<b>3</b>	<b>0</b>	<b>259</b>	<b>256</b>	<b>-3</b>	<b>37,743</b>	<b>37,178</b>	<b>-1.5%</b>	<b>3,765,208</b>	<b>3,860,161</b>	<b>2.5%</b>	
<b>Average/Total - Small, Nonhub and EAS</b>			New York	<b>2</b>	<b>2</b>	<b>0</b>	<b>105</b>	<b>106</b>	<b>1</b>	<b>8,720</b>	<b>8,147</b>	<b>-6.6%</b>	<b>601,574</b>	<b>592,149</b>	<b>-1.6%</b>	
CLT	Charlotte	Large	North Carolina	7	8	1	114	123	9	20,754	20,919	0.8%	2,078,481	2,098,422	1.0%	
RDU	Raleigh/Durham	Medium	North Carolina	6	7	1	37	40	3	5,128	5,188	1.2%	524,541	543,822	3.7%	
GSO	Greensboro	Small	North Carolina	5	5	0	14	14	0	1,384	1,391	0.5%	98,707	100,458	1.8%	
AVL	Asheville	Nonhub	North Carolina	4	4	0	11	10	-1	652	611	-6.3%	44,361	46,716	5.3%	
EWN	New Bern	Nonhub	North Carolina	2	2	0	2	2	0	295	243	-17.6%	14,659	12,085	-17.6%	
FAY	Fayetteville, NC	Nonhub	North Carolina	3	3	0	3	3	0	455	406	-10.8%	25,724	22,872	-11.1%	
ILM	Wilmington, NC	Nonhub	North Carolina	2	2	0	5	5	0	606	637	5.1%	40,810	42,362	3.8%	
ISO	Kinston	Nonhub	North Carolina	0	0	0	-	-	0	-	-	-	-	-	-	
OAJ	Jacksonville, NC	Nonhub	North Carolina	2	2	0	2	2	0	350	308	-12.0%	18,723	17,362	-7.3%	
PGV	Greenville	EAS	North Carolina	1	1	0	1	1	0	146	114	-21.9%	7,300	5,700	-21.9%	
SOP	Southern Pines	Nonhub	North Carolina	0	0	0	-	-	0	-	-	-	-	-	-	
USA	Concord, NC	Nonhub	North Carolina	1	1	0	1	3	2	4	32	700.0%	708	5,455	670.5%	
<b>Average/Total - All Airports</b>			North Carolina	<b>3</b>	<b>3</b>	<b>0</b>	<b>190</b>	<b>203</b>	<b>13</b>	<b>29,774</b>	<b>29,849</b>	<b>0.3%</b>	<b>2,854,014</b>	<b>2,895,254</b>	<b>1.4%</b>	
<b>Average/Total - Small, Nonhub and EAS</b>			North Carolina	<b>2</b>	<b>2</b>	<b>0</b>	<b>39</b>	<b>40</b>	<b>1</b>	<b>3,892</b>	<b>3,742</b>	<b>-3.9%</b>	<b>250,992</b>	<b>253,010</b>	<b>0.8%</b>	
FAR	Fargo	Small	North Dakota	5	4	-1	10	10	0	633	650	2.7%	43,464	44,722	2.9%	
BIS	Bismarck	Nonhub	North Dakota	4	5	1	5	7	2	352	412	17.0%	23,911	28,182	17.9%	
DIK	Dickinson	Nonhub	North Dakota	2	2	0	2	2	0	158	113	-28.5%	7,900	5,650	-28.5%	
DVL	Devils Lake	EAS	North Dakota	1	1	0	2	2	0	48	48	0.0%	2,400	2,400	0.0%	
GFK	Grand Forks	Nonhub	North Dakota	2	2	0	4	4	0	186	186	0.0%	11,937	12,979	8.7%	
ISN	Williston	Nonhub	North Dakota	2	2	0	3	3	0	233	259	11.2%	11,650	12,950	11.2%	
JMS	Jamestown (US) ND	EAS	North Dakota	1	1	0	2	2	0	74	74	0.0%	3,700	3,700	0.0%	
MOT	Minot	Nonhub	North Dakota	4	3	-1	4	4	0	318	320	0.6%	20,998	20,093	-4.3%	
<b>Average/Total - All Airports</b>			North Dakota	<b>3</b>	<b>3</b>	<b>0</b>	<b>32</b>	<b>34</b>	<b>2</b>	<b>2,002</b>	<b>2,062</b>	<b>3.0%</b>	<b>125,960</b>	<b>130,676</b>	<b>3.7%</b>	
<b>Average/Total - Small, Nonhub and EAS</b>			North Dakota	<b>3</b>	<b>3</b>	<b>0</b>	<b>32</b>	<b>34</b>	<b>2</b>	<b>2,002</b>	<b>2,062</b>	<b>3.0%</b>	<b>125,960</b>	<b>130,676</b>	<b>3.7%</b>	

## Domestic Only

Airport	Airport Name	Hub Size	State	Number of Carriers			Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
CLE	Cleveland	Medium	Ohio	5	7	2	41	35	-6	4,221	4,262	1.0%	371,021	445,768	20.1%
CMH	Columbus, OH	Medium	Ohio	4	4	0	28	30	2	3,938	4,074	3.5%	352,564	384,427	9.0%
CVG	Cincinnati	Medium	Ohio	6	7	1	48	48	0	4,224	4,161	-1.5%	306,513	345,657	12.8%
CAK	Akron	Small	Ohio	4	5	1	11	14	3	933	932	-0.1%	86,948	89,306	2.7%
DAY	Dayton	Small	Ohio	4	4	0	15	15	0	1,662	1,600	-3.7%	120,291	120,057	-0.2%
LCK	Columbus Rickenbaker, OH	Nonhub	Ohio	1	1	0	3	6	3	30	61	103.3%	5,046	10,269	103.5%
LUK	Cincinnati	Nonhub	Ohio	1	1	0	3	3	0	54	59	9.3%	1,620	1,770	9.3%
TOL	Toledo	Nonhub	Ohio	2	2	0	4	4	0	97	112	15.5%	6,043	7,881	30.4%
YNG	Youngstown	Nonhub	Ohio	1	1	0	4	4	0	35	45	28.6%	5,810	7,536	29.7%
<b>Average/Total - All Airports</b>			Ohio	<b>3</b>	<b>4</b>	<b>0</b>	<b>157</b>	<b>159</b>	<b>2</b>	<b>15,194</b>	<b>15,306</b>	<b>0.7%</b>	<b>1,255,856</b>	<b>1,412,671</b>	<b>12.5%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Ohio	<b>2</b>	<b>2</b>	<b>0</b>	<b>40</b>	<b>46</b>	<b>6</b>	<b>2,811</b>	<b>2,809</b>	<b>-0.1%</b>	<b>225,758</b>	<b>236,819</b>	<b>4.9%</b>
OKC	Oklahoma City	Medium	Oklahoma	6	6	0	21	22	1	2,228	2,116	-5.0%	222,139	211,926	-4.6%
TUL	Tulsa	Small	Oklahoma	5	5	0	19	20	1	1,802	1,623	-9.9%	166,897	157,369	-5.7%
LAW	Lawton	Nonhub	Oklahoma	1	1	0	1	1	0	123	122	-0.8%	6,150	5,998	-2.5%
<b>Average/Total - All Airports</b>			Oklahoma	<b>4</b>	<b>4</b>	<b>0</b>	<b>41</b>	<b>43</b>	<b>2</b>	<b>4,153</b>	<b>3,861</b>	<b>-7.0%</b>	<b>395,186</b>	<b>375,293</b>	<b>-5.0%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Oklahoma	<b>3</b>	<b>3</b>	<b>0</b>	<b>20</b>	<b>21</b>	<b>1</b>	<b>1,925</b>	<b>1,745</b>	<b>-9.4%</b>	<b>173,047</b>	<b>163,367</b>	<b>-5.6%</b>
PDX	Portland, OR	Large	Oregon	11	11	0	57	57	0	7,629	7,653	0.3%	879,002	938,915	6.8%
EUG	Eugene	Small	Oregon	6	5	-1	10	9	-1	740	649	-12.3%	48,575	47,342	-2.5%
LMT	Klamath Falls	Nonhub	Oregon	0	0	0	-	-	0	-	-	-	-	-	-
MFR	Medford	Nonhub	Oregon	4	4	0	7	8	1	549	576	4.9%	37,182	42,188	13.5%
OTH	North Bend	Nonhub	Oregon	2	2	0	2	3	1	160	140	-12.5%	3,941	3,080	-21.8%
PDT	Pendleton	EAS	Oregon	1	1	0	1	1	0	94	94	0.0%	846	846	0.0%
RDM	Redmond	Nonhub	Oregon	4	4	0	6	6	0	565	499	-11.7%	32,512	31,918	-1.8%
SLE	Salem, OR	Nonhub	Oregon	0	0	0	-	-	0	-	-	-	-	-	-
<b>Average/Total - All Airports</b>			Oregon	<b>4</b>	<b>3</b>	<b>0</b>	<b>83</b>	<b>84</b>	<b>1</b>	<b>9,737</b>	<b>9,611</b>	<b>-1.3%</b>	<b>1,002,058</b>	<b>1,064,289</b>	<b>6.2%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Oregon	<b>2</b>	<b>2</b>	<b>0</b>	<b>26</b>	<b>27</b>	<b>1</b>	<b>2,108</b>	<b>1,958</b>	<b>-7.1%</b>	<b>123,056</b>	<b>125,374</b>	<b>1.9%</b>
PHL	Philadelphia	Large	Pennsylvania	8	8	0	92	95	3	15,601	15,362	-1.5%	1,424,487	1,451,466	1.9%
PIT	Pittsburgh	Medium	Pennsylvania	5	8	3	33	44	11	4,301	4,822	12.1%	428,254	452,699	5.7%
MDT	Harrisburg	Small	Pennsylvania	5	4	-1	12	9	-3	983	900	-8.4%	71,532	61,526	-14.0%
ABE	Allentown	Nonhub	Pennsylvania	4	4	0	9	9	0	507	493	-2.8%	33,452	33,592	0.4%
AOO	Altoona	EAS	Pennsylvania	1	1	0	2	1	-1	78	114	46.2%	2,652	1,140	-57.0%
AVP	Wilkes-Barre	Nonhub	Pennsylvania	4	4	0	7	7	0	421	461	9.5%	20,928	22,942	9.6%
bfd	Bradford	EAS	Pennsylvania	1	1	0	2	1	-1	78	104	33.3%	1,482	1,040	-29.8%
DUJ	Dubois	EAS	Pennsylvania	1	1	0	2	2	0	104	78	-25.0%	1,976	2,652	34.2%
ERI	Erie	Nonhub	Pennsylvania	3	3	0	3	3	0	229	233	1.7%	10,319	10,506	1.8%
FKL	Franklin	EAS	Pennsylvania	1	1	0	2	1	-1	104	83	-20.2%	1,976	830	-58.0%
IPT	Williamsport	Nonhub	Pennsylvania	1	1	0	1	1	0	87	86	-1.1%	3,219	3,182	-1.1%
JST	Johnstown	EAS	Pennsylvania	1	1	0	2	2	0	83	109	31.3%	2,822	3,706	31.3%
LBE	Latrobe	Nonhub	Pennsylvania	1	1	0	3	5	2	84	147	75.0%	14,226	25,407	78.6%
LNS	Lancaster	EAS	Pennsylvania	1	1	0	1	2	1	130	130	0.0%	1,170	1,300	11.1%
SCE	State College	Nonhub	Pennsylvania	3	3	0	5	5	0	380	378	-0.5%	17,232	17,080	-0.9%
<b>Average/Total - All Airports</b>			Pennsylvania	<b>3</b>	<b>3</b>	<b>0</b>	<b>176</b>	<b>187</b>	<b>11</b>	<b>23,170</b>	<b>23,500</b>	<b>1.4%</b>	<b>2,035,727</b>	<b>2,089,068</b>	<b>2.6%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Pennsylvania	<b>2</b>	<b>2</b>	<b>0</b>	<b>51</b>	<b>48</b>	<b>-3</b>	<b>3,268</b>	<b>3,316</b>	<b>1.5%</b>	<b>182,986</b>	<b>184,903</b>	<b>1.0%</b>
PVD	Providence	Small	Rhode Island	6	6	0	18	16	-2	1,972	1,850	-6.2%	192,562	182,002	-5.5%
BID	Block Island	Nonhub	Rhode Island	1	1	0	1	1	0	140	108	-22.9%	1,260	972	-22.9%
WST	Westerly	Nonhub	Rhode Island	0	0	0	-	-	0	-	-	-	-	-	-
<b>Average/Total - All Airports</b>			Rhode Island	<b>2</b>	<b>2</b>	<b>0</b>	<b>19</b>	<b>17</b>	<b>-2</b>	<b>2,112</b>	<b>1,958</b>	<b>-7.3%</b>	<b>193,822</b>	<b>182,974</b>	<b>-5.6%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Rhode Island	<b>2</b>	<b>2</b>	<b>0</b>	<b>19</b>	<b>17</b>	<b>-2</b>	<b>2,112</b>	<b>1,958</b>	<b>-7.3%</b>	<b>193,822</b>	<b>182,974</b>	<b>-5.6%</b>

## Domestic Only

Airport	Airport Name	Hub Size	State	Number of Carriers			Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
CAE	Columbia, SC	Small	South Carolina	3	3	0	10	9	-1	961	922	-4.1%	56,103	55,738	-0.7%
CHS	Charleston, SC	Small	South Carolina	5	6	1	19	22	3	2,002	2,086	4.2%	170,640	184,456	8.1%
GSP	Greenville, SC	Small	South Carolina	5	5	0	18	18	0	1,314	1,361	3.6%	95,369	102,500	7.5%
MYR	Myrtle Beach	Small	South Carolina	5	5	0	25	31	6	1,064	1,113	4.6%	125,666	138,287	10.0%
FLO	Florence, SC	Nonhub	South Carolina	1	1	0	1	1	0	170	117	-31.2%	7,772	5,148	-33.8%
HHH	Hilton Head Island	Nonhub	South Carolina	1	1	0	2	1	-1	224	158	-29.5%	8,288	5,846	-29.5%
<b>Average/Total - All Airports</b>			South Carolina	<b>3</b>	<b>4</b>	<b>0</b>	<b>75</b>	<b>82</b>	<b>7</b>	<b>5,735</b>	<b>5,757</b>	0.4%	<b>463,838</b>	<b>491,975</b>	6.1%
<b>Average/Total - Small, Nonhub and EAS</b>			South Carolina	<b>3</b>	<b>4</b>	<b>0</b>	<b>75</b>	<b>82</b>	<b>7</b>	<b>5,735</b>	<b>5,757</b>	0.4%	<b>463,838</b>	<b>491,975</b>	6.1%
FSD	Sioux Falls	Small	South Dakota	5	5	0	10	10	0	761	649	-14.7%	48,946	46,918	-4.1%
ABR	Aberdeen (US)	EAS	South Dakota	1	1	0	1	1	0	62	62	0.0%	3,100	3,100	0.0%
ATY	Watertown (US) SD	EAS	South Dakota	1	1	0	2	1	-1	124	93	-25.0%	1,116	837	-25.0%
BKX	Brookings, SD	Nonhub	South Dakota	0	0	0	-	-	0	-	-	-	-	-	-
HON	Huron	EAS	South Dakota	1	1	0	1	2	1	62	124	100.0%	558	1,116	100.0%
PIR	Pierre	Nonhub	South Dakota	1	1	0	3	3	0	217	124	-42.9%	1,953	1,767	-9.5%
RAP	Rapid City	Nonhub	South Dakota	4	4	0	9	9	0	598	612	2.3%	37,367	39,140	4.7%
<b>Average/Total - All Airports</b>			South Dakota	<b>2</b>	<b>2</b>	<b>0</b>	<b>26</b>	<b>26</b>	<b>0</b>	<b>1,824</b>	<b>1,664</b>	-8.8%	<b>93,040</b>	<b>92,878</b>	-0.2%
<b>Average/Total - Small, Nonhub and EAS</b>			South Dakota	<b>2</b>	<b>2</b>	<b>0</b>	<b>26</b>	<b>26</b>	<b>0</b>	<b>1,824</b>	<b>1,664</b>	-8.8%	<b>93,040</b>	<b>92,878</b>	-0.2%
BNA	Nashville	Medium	Tennessee	6	7	1	45	48	3	5,498	5,733	4.3%	596,651	638,630	7.0%
MEM	Memphis	Small	Tennessee	6	9	3	32	38	6	2,403	2,608	8.5%	191,082	209,697	9.7%
TYS	Knoxville	Small	Tennessee	5	5	0	18	17	-1	1,517	1,476	-2.7%	96,825	93,858	-3.1%
CHA	Chattanooga	Nonhub	Tennessee	3	3	0	8	8	0	615	626	1.8%	34,995	38,426	9.8%
MKL	Jackson (US) TN	EAS	Tennessee	1	1	0	2	1	-1	104	78	-25.0%	936	624	-33.3%
TRI	Tri-Cities	Nonhub	Tennessee	3	3	0	4	4	0	363	375	3.3%	25,358	23,971	-5.5%
<b>Average/Total - All Airports</b>			Tennessee	<b>4</b>	<b>5</b>	<b>1</b>	<b>109</b>	<b>116</b>	<b>7</b>	<b>10,500</b>	<b>10,896</b>	3.8%	<b>945,847</b>	<b>1,005,206</b>	6.3%
<b>Average/Total - Small, Nonhub and EAS</b>			Tennessee	<b>4</b>	<b>4</b>	<b>1</b>	<b>64</b>	<b>68</b>	<b>4</b>	<b>5,002</b>	<b>5,163</b>	3.2%	<b>349,196</b>	<b>366,576</b>	5.0%
DFW	Dallas/Fort Worth	Large	Texas	10	10	0	145	147	2	25,923	26,130	0.8%	2,933,118	2,988,866	1.9%
IAH	Houston Bush	Large	Texas	7	6	-1	114	116	2	16,632	16,052	-3.5%	1,556,172	1,611,234	3.5%
SAT	San Antonio	Medium	Texas	5	5	0	28	30	2	3,507	3,452	-1.6%	420,773	424,964	1.0%
AUS	Austin	Medium	Texas	9	11	2	38	44	6	4,427	4,884	10.3%	554,929	633,003	14.1%
DAL	Dallas Love	Medium	Texas	4	4	0	19	52	33	3,764	5,855	55.6%	483,064	812,448	68.2%
HOU	Houston Hobby	Medium	Texas	5	5	0	50	50	0	5,020	5,012	-0.2%	681,907	673,188	-1.3%
AMA	Amarillo	Small	Texas	3	3	0	5	5	0	605	492	-18.7%	50,547	40,554	-19.8%
ELP	El Paso	Small	Texas	4	4	0	12	12	0	1,612	1,407	-12.7%	175,011	149,477	-14.6%
LBB	Lubbock	Small	Texas	3	3	0	6	6	0	561	553	-1.4%	52,596	51,547	-2.0%
MAF	Midland/Odessa	Small	Texas	3	3	0	6	6	0	855	823	-3.7%	69,157	73,150	5.8%
ABI	Abilene	Nonhub	Texas	1	1	0	1	1	0	237	210	-11.4%	11,328	9,954	-12.1%
ACT	Waco	Nonhub	Texas	1	1	0	1	1	0	147	148	0.7%	7,290	7,400	1.5%
BPT	Beaumont	Nonhub	Texas	1	1	0	1	1	0	91	91	0.0%	4,484	4,550	1.5%
BRO	Brownsville	Nonhub	Texas	2	3	1	2	3	1	203	241	18.7%	9,643	13,081	35.7%
CLL	College Station	Nonhub	Texas	2	2	0	2	2	0	231	219	-5.2%	10,883	10,938	0.5%
CRP	Corpus Christi	Nonhub	Texas	3	3	0	3	3	0	586	522	-10.9%	42,397	39,782	-6.2%
DRT	Del Rio, TX	Nonhub	Texas	0	0	0	-	-	0	-	-	-	-	-	-
GGG	Longview	Nonhub	Texas	1	1	0	1	1	0	59	60	1.7%	2,950	3,000	1.7%
GRK	Killeen	Nonhub	Texas	3	3	0	3	3	0	409	372	-9.0%	20,922	19,804	-5.3%
HLR	Harlingen	Nonhub	Texas	2	2	0	3	3	0	285	283	-0.7%	27,005	27,210	0.8%
LRD	Laredo	Nonhub	Texas	3	3	0	4	4	0	227	227	0.0%	13,136	13,935	6.1%
MFE	McAllen	Nonhub	Texas	3	3	0	5	5	0	415	422	1.7%	38,555	45,184	17.2%
SJT	San Angelo	Nonhub	Texas	1	1	0	1	1	0	148	150	1.4%	7,244	7,500	3.5%
SPS	Wichita Falls	Nonhub	Texas	1	1	0	1	1	0	122	122	0.0%	6,022	5,890	-2.2%
TYR	Tyler	Nonhub	Texas	2	2	0	2	2	0	224	228	1.8%	10,192	11,400	11.9%
VCT	Victoria (US)	EAS	Texas	1	1	0	1	1	0	104	39	-62.5%	936	741	-20.8%
<b>Average/Total - All Airports</b>			Texas	<b>3</b>	<b>3</b>	<b>0</b>	<b>454</b>	<b>500</b>	<b>46</b>	<b>66,394</b>	<b>67,994</b>	2.4%	<b>7,190,261</b>	<b>7,678,800</b>	6.8%
<b>Average/Total - Small, Nonhub and EAS</b>			Texas	<b>2</b>	<b>2</b>	<b>0</b>	<b>60</b>	<b>61</b>	<b>1</b>	<b>7,121</b>	<b>6,609</b>	-7.2%	<b>560,298</b>	<b>535,097</b>	-4.5%

## Domestic Only

Airport	Airport Name	Hub Size	State	Number of Carriers			Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
SLC	Salt Lake City	Large	Utah	7	7	0	85	83	-2	10,471	9,879	-5.7%	1,093,833	1,112,060	1.7%
CDC	Cedar City	EAS	Utah	1	1	0	1	1	0	83	52	-37.3%	2,490	2,600	4.4%
CNY	Moab	EAS	Utah	1	0	-1	1	-	-1	54	-	-100.0%	1,620	-	-100.0%
OGD	Ogden, UT	Nonhub	Utah	1	1	0	1	1	0	9	9	0.0%	1,404	1,424	1.4%
PVU	Provo	Nonhub	Utah	1	1	0	3	3	0	36	38	5.6%	5,616	5,928	5.6%
SGU	St George	Nonhub	Utah	2	2	0	2	2	0	203	155	-23.6%	6,730	7,750	15.2%
VEL	Vernal	EAS	Utah	1	0	-1	1	-	-1	52	-	-100.0%	1,560	-	-100.0%
<b>Average/Total - All Airports</b>			Utah	<b>2</b>	<b>2</b>	<b>0</b>	<b>94</b>	<b>90</b>	<b>-4</b>	<b>10,908</b>	<b>10,133</b>	<b>-7.1%</b>	<b>1,113,253</b>	<b>1,129,762</b>	<b>1.5%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Utah	<b>1</b>	<b>1</b>	<b>0</b>	<b>9</b>	<b>7</b>	<b>-2</b>	<b>437</b>	<b>254</b>	<b>-41.9%</b>	<b>19,420</b>	<b>17,702</b>	<b>-8.8%</b>
BTV	Burlington, VT	Small	Vermont	5	5	0	10	11	1	1,015	988	-2.7%	70,566	68,902	-2.4%
RUT	Rutland	EAS	Vermont	1	1	0	1	1	0	93	93	0.0%	837	837	0.0%
<b>Average/Total - All Airports</b>			Vermont	<b>3</b>	<b>3</b>	<b>0</b>	<b>11</b>	<b>12</b>	<b>1</b>	<b>1,108</b>	<b>1,081</b>	<b>-2.4%</b>	<b>71,403</b>	<b>69,739</b>	<b>-2.3%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Vermont	<b>3</b>	<b>3</b>	<b>0</b>	<b>11</b>	<b>12</b>	<b>1</b>	<b>1,108</b>	<b>1,081</b>	<b>-2.4%</b>	<b>71,403</b>	<b>69,739</b>	<b>-2.3%</b>
DCA	Washington National	Large	Virginia	9	9	0	82	82	0	11,449	12,335	7.7%	1,109,419	1,238,612	11.6%
IAD	Washington Dulles	Large	Virginia	8	10	2	80	80	0	8,779	8,234	-6.2%	754,953	774,565	2.6%
ORF	Norfolk	Small	Virginia	4	4	0	18	18	0	2,003	2,087	4.2%	164,060	171,084	4.3%
RIC	Richmond	Small	Virginia	5	6	1	17	18	1	2,350	2,306	-1.9%	185,545	192,025	3.5%
CHO	Charlottesville	Nonhub	Virginia	3	3	0	6	6	0	600	594	-1.0%	27,355	29,190	6.7%
LYH	Lynchburg	Nonhub	Virginia	1	1	0	1	1	0	177	172	-2.8%	8,850	8,535	-3.6%
PHF	Newport News	Nonhub	Virginia	4	2	-2	5	3	-2	469	410	-12.6%	24,226	22,066	-8.9%
ROA	Roanoke	Nonhub	Virginia	4	4	0	9	8	-1	688	656	-4.7%	36,740	36,272	-1.3%
SHD	Staunton	EAS	Virginia	1	1	0	1	1	0	78	78	0.0%	2,652	2,652	0.0%
<b>Average/Total - All Airports</b>			Virginia	<b>4</b>	<b>4</b>	<b>0</b>	<b>219</b>	<b>217</b>	<b>-2</b>	<b>26,593</b>	<b>26,872</b>	<b>1.0%</b>	<b>2,313,800</b>	<b>2,475,001</b>	<b>7.0%</b>
<b>Average/Total - Small, Nonhub and EAS</b>			Virginia	<b>3</b>	<b>3</b>	<b>0</b>	<b>57</b>	<b>55</b>	<b>-2</b>	<b>6,365</b>	<b>6,303</b>	<b>-1.0%</b>	<b>449,428</b>	<b>461,824</b>	<b>2.8%</b>
SEA	Seattle	Large	Washington	10	10	0	80	83	3	14,246	16,218	13.8%	1,955,390	2,173,917	11.2%
GEG	Spokane	Small	Washington	6	5	-1	13	11	-2	1,460	1,592	9.0%	175,847	171,765	-2.3%
PSC	Pasco	Nonhub	Washington	4	4	0	9	9	0	514	509	-1.0%	36,762	41,208	12.1%
BLI	Bellingham	Small	Washington	3	2	-1	10	8	-2	416	326	-21.6%	53,581	38,238	-28.6%
EAT	Wenatchee	Nonhub	Washington	1	1	0	1	1	0	87	119	36.8%	6,612	9,044	36.8%
PUW	Pullman	Nonhub	Washington	1	1	0	1	1	0	80	92	15.0%	6,080	6,992	15.0%
YKM	Yakima	Nonhub	Washington	1	1	0	1	1	0	86	87	1.2%	6,536	6,612	1.2%
LKE	Seattle	Nonhub	Washington	1	1	0	1	7	6	31	968	3022.6%	186	5,808	3022.6%
ALW	Walla Walla	Nonhub	Washington	1	1	0	1	1	0	56	68	21.4%	4,256	5,168	21.4%
BFI	Seattle	Nonhub	Washington	1	1	0	2	2	0	62	184	196.8%	558	1,656	196.8%
FRD	Friday Harbor	Nonhub	Washington	1	1	0	1	2	1	31	155	400.0%	279	1,395	400.0%
ESD	Eastsound	Nonhub	Washington	0	1	1	-	2	2	-	124	-	-	1,116	-
KEH	Kenmore Air Harbor	Nonhub	Washington	0	1	1	-	7	7	-	149	-	-	894	-
DHB	Deer Harbor	Nonhub	Washington	0	1	1	-	2	2	-	141	-	-	846	-
LPS	Lopez Island	Nonhub	Washington	0	1	1	-	2	2	-	141	-	-	846	-
RCE	Roche Harbor	Nonhub	Washington	0	1	1	-	2	2	-	141	-	-	846	-
WSX	Westsound	Nonhub	Washington	0	1	1	-	2	2	-	141	-	-	846	-
RSJ	Rosario (US)	Nonhub	Washington	0	1	1	-	2	2	-	141	-	-	846	-
FBS	Friday Harbor SPB	Nonhub	Washington	1	1	0	1	2	1	31	141	354.8%	186	846	354.8%
CLM	Port Angeles	Nonhub	Washington	1	0	-1	1	-	-1	31	-	-100.0%	279	-	-100.0%
ODW	Oak Harbor, WA	Nonhub	Washington	0	0	0	-	-	0	-	-	-	-	-	-
<b>Average/Total - All Airports</b>			Washington	<b>2</b>	<b>2</b>	<b>0</b>	<b>122</b>	<b>147</b>	<b>25</b>	<b>17,131</b>	<b>21,437</b>	<b>25.1%</b>	<b>2,246,552</b>	<b>2,468,889</b>	<b>9.9%</b>

### Domestic Only

Airport	Airport Name	Hub Size	State	Number of Carriers			Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
<b>Average/Total - Small, Nonhub and EAS</b>			Washington				42	64	22	2,885	5,219	80.9%	291,162	294,972	1.3%
BKW	Beckley	EAS	West Virginia	1	1	0	2	1	-1	52	52	0.0%	1,768	1,560	-11.8%
BLF	Bluefield, WV	Nonhub	West Virginia	0	0	0	-	-	0	-	-	-	-	-	-
CKB	Clarksburg	EAS	West Virginia	2	2	0	3	5	2	81	88	8.6%	3,150	4,312	36.9%
CRW	Charleston, WV	Nonhub	West Virginia	4	4	0	10	8	-2	622	539	-13.3%	32,064	27,665	-13.7%
HTS	Huntington	Nonhub	West Virginia	2	2	0	4	5	1	155	150	-3.2%	11,788	12,902	9.5%
LWB	Lewisburg	EAS	West Virginia	2	1	-1	2	2	0	62	62	0.0%	2,108	2,108	0.0%
MGW	Morgantown	EAS	West Virginia	1	1	0	2	3	1	104	104	0.0%	3,536	3,536	0.0%
PKB	Parkersburg/Marietta	EAS	West Virginia	1	1	0	1	2	1	104	78	-25.0%	1,976	2,652	34.2%
<b>Average/Total - All Airports</b>			West Virginia	2	2	0	24	26	2	1,180	1,073	-9.1%	56,390	54,735	-2.9%
<b>Average/Total - Small, Nonhub and EAS</b>			West Virginia	2	2	0	24	26	2	1,180	1,073	-9.1%	56,390	54,735	-2.9%
MKE	Milwaukee	Medium	Wisconsin	5	7	2	29	31	2	3,348	3,240	-3.2%	347,553	345,771	-0.5%
MSN	Madison	Small	Wisconsin	4	4	0	12	10	-2	1,288	1,103	-14.4%	92,694	96,437	4.0%
ARV	Minocqua, WI	Nonhub	Wisconsin	0	0	0	-	-	0	-	-	-	-	-	-
ATW	Appleton	Nonhub	Wisconsin	3	3	0	7	7	0	455	426	-6.4%	29,628	28,295	-4.5%
CWA	Wausau	Nonhub	Wisconsin	3	3	0	3	3	0	260	269	3.5%	12,796	13,450	5.1%
EAU	Eau Claire	EAS	Wisconsin	1	1	0	1	1	0	62	62	0.0%	3,100	3,100	0.0%
EGV	Eagle River, WI	Nonhub	Wisconsin	0	0	0	-	-	0	-	-	-	-	-	-
GRB	Green Bay	Nonhub	Wisconsin	3	3	0	4	4	0	581	540	-7.1%	38,570	37,062	-3.9%
LSE	La Crosse	Nonhub	Wisconsin	2	2	0	3	2	-1	257	188	-26.8%	12,850	9,370	-27.1%
RHI	Rhineland	EAS	Wisconsin	1	1	0	2	2	0	88	88	0.0%	4,400	4,400	0.0%
<b>Average/Total - All Airports</b>			Wisconsin	2	2	0	61	60	-1	6,339	5,916	-6.7%	541,591	537,885	-0.7%
<b>Average/Total - Small, Nonhub and EAS</b>			Wisconsin	2	2	0	32	29	-3	2,991	2,676	-10.5%	194,038	192,114	-1.0%
COD	Cody	EAS	Wyoming	2	2	0	3	3	0	103	97	-5.8%	5,210	4,930	-5.4%
CPR	Casper	Nonhub	Wyoming	3	3	0	3	3	0	204	234	14.7%	10,664	12,744	19.5%
CYS	Cheyenne	Nonhub	Wyoming	1	1	0	1	1	0	68	83	22.1%	612	747	22.1%
GCC	Gillette	Nonhub	Wyoming	2	2	0	3	2	-1	124	87	-29.8%	3,720	4,350	16.9%
JAC	Jackson, WY	Nonhub	Wyoming	4	3	-1	9	9	0	488	497	1.8%	60,944	58,513	-4.0%
LAR	Laramie	EAS	Wyoming	1	1	0	1	1	0	62	52	-16.1%	1,860	2,600	39.8%
RIW	Riverton	Nonhub	Wyoming	1	1	0	2	2	0	150	124	-17.3%	2,850	1,116	-60.8%
RKS	Rock Springs	Nonhub	Wyoming	2	1	-1	3	1	-2	154	57	-63.0%	4,620	2,850	-38.3%
SHR	Sheridan	Nonhub	Wyoming	1	0	-1	1	-	-1	77	-	-100.0%	2,310	-	-100.0%
WRL	Worland	EAS	Wyoming	1	1	0	1	1	0	62	62	0.0%	1,178	558	-52.6%
<b>Average/Total - All Airports</b>			Wyoming	2	2	0	27	23	-4	1,492	1,293	-13.3%	93,968	88,408	-5.9%
<b>Average/Total - Small, Nonhub and EAS</b>			Wyoming	2	2	0	27	23	-4	1,492	1,293	-13.3%	93,968	88,408	-5.9%
<b>Average/Total - All Airports - All States</b>						5,449	5,557	108	694,860	697,738	0.4%	72,633,702	75,926,236	4.5%	
<b>Average/Total - Small, Nonhub and EAS - All States</b>						1,910	1,950	40	147,879	145,025	-1.9%	10,773,476	10,831,715	0.5%	



# **VIRGINIA COMMERCIAL AIR SERVICE STRATEGIC REVIEW**

## **Summary International 7\_15**

## International Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
JFK	New York Kennedy	Large	New York	102	117	15	6,102	8,246	35.1%	1,349,783	1,848,215	36.9%
MIA	Miami	Large	Florida	72	92	20	5,325	6,224	16.9%	908,427	1,104,825	21.6%
EWR	New York Newark	Large	New Jersey	80	78	-2	4,141	4,128	-0.3%	665,942	672,891	1.0%
IAH	Houston Bush	Large	Texas	63	72	9	4,106	4,303	4.8%	457,649	611,386	33.6%
LAX	Los Angeles	Large	California	65	71	6	4,844	5,079	4.9%	975,956	1,190,788	22.0%
ATL	Atlanta	Large	Georgia	80	70	-10	3,283	3,398	3.5%	548,780	612,165	11.6%
ORD	Chicago O'Hare	Large	Illinois	53	59	6	4,058	4,095	0.9%	700,202	716,771	2.4%
DFW	Dallas/Fort Worth	Large	Texas	34	54	20	2,071	2,791	34.8%	293,112	444,480	51.6%
<b>IAD</b>	<b>Washington Dulles</b>	<b>Large</b>	<b>Virginia</b>	<b>38</b>	<b>47</b>	<b>9</b>	<b>1,867</b>	<b>2,122</b>	<b>13.7%</b>	<b>367,830</b>	<b>444,546</b>	<b>20.9%</b>
FLL	Fort Lauderdale	Large	Florida	36	44	8	2,312	2,085	-9.8%	185,434	280,652	51.3%
SFO	San Francisco	Large	California	27	37	10	2,133	2,655	24.5%	478,637	640,317	33.8%
BOS	Boston	Large	Massachusetts	31	35	4	1,856	1,989	7.2%	252,828	346,887	37.2%
PHL	Philadelphia	Large	Pennsylvania	35	35	0	1,650	1,751	6.1%	252,547	273,385	8.3%
MCO	Orlando	Large	Florida	14	32	18	650	1,438	121.2%	113,610	285,154	151.0%
CLT	Charlotte	Large	North Carolina	24	31	7	748	1,126	50.5%	115,269	185,831	61.2%
LAS	Las Vegas	Large	Nevada	17	22	5	716	959	33.9%	112,466	177,476	57.8%
HNL	Honolulu	Large	Hawaii	14	21	7	733	1,045	42.6%	222,797	296,329	33.0%
DTW	Detroit	Large	Michigan	25	20	-5	1,431	1,055	-26.3%	219,226	187,577	-14.4%
SEA	Seattle	Large	Washington	14	19	5	1,510	1,940	28.5%	154,165	272,955	77.1%
DEN	Denver	Large	Colorado	16	17	1	960	768	-20.0%	112,664	104,815	-7.0%
MSP	Minneapolis/St. Paul	Large	Minnesota	14	15	1	978	959	-1.9%	125,785	129,031	2.6%
PHX	Phoenix	Large	Arizona	16	14	-2	716	638	-10.9%	91,790	92,269	0.5%
BWI	Baltimore	Large	Maryland	9	12	3	296	402	35.8%	31,941	50,340	57.6%
SAN	San Diego	Large	California	5	9	4	136	233	71.3%	15,476	38,824	150.9%
SLC	Salt Lake City	Large	Utah	11	9	-2	416	289	-30.5%	31,408	36,817	17.2%
MDW	Chicago Midway	Large	Illinois	2	8	6	35	393	1022.9%	5,600	44,133	688.1%
PDX	Portland, OR	Large	Oregon	5	7	2	381	362	-5.0%	34,107	37,815	10.9%
LGA	New York LaGuardia	Large	New York	8	6	-2	1,022	1,403	37.3%	80,760	115,818	43.4%
TPA	Tampa	Large	Florida	3	6	3	81	168	107.4%	11,580	26,695	130.5%
<b>DCA</b>	<b>Washington National</b>	<b>Large</b>	<b>Virginia</b>	<b>4</b>	<b>5</b>	<b>1</b>	<b>325</b>	<b>360</b>	<b>10.8%</b>	<b>24,035</b>	<b>24,410</b>	<b>1.6%</b>
Average/Total - Large Hub Airports				917	1,064	147	54,882	62,404	13.7%	8,939,806	11,293,597	26.3%

## International Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
OAK	Oakland	Medium	California	4	7	3	75	115	53.3%	10,932	22,244	103.5%
SAT	San Antonio	Medium	Texas	3	5	2	130	263	102.3%	14,405	31,487	118.6%
CVG	Cincinnati	Medium	Ohio	11	5	-6	413	166	-59.8%	46,708	16,385	-64.9%
PIT	Pittsburgh	Medium	Pennsylvania	3	5	2	144	167	16.0%	8,820	11,787	33.6%
STL	St. Louis	Medium	Missouri	3	5	2	84	102	21.4%	6,914	9,960	44.1%
ANC	Anchorage	Medium	Alaska	3	4	1	92	59	-35.9%	17,829	9,953	-44.2%
AUS	Austin	Medium	Texas	1	4	3	31	91	193.5%	1,550	13,410	765.2%
MSY	New Orleans	Medium	Louisiana	-	4	4	-	74	-	-	8,516	-
SJC	San Jose	Medium	California	3	4	1	71	143	101.4%	10,000	24,978	149.8%
SNA	Orange County	Medium	California	-	4	4	-	132	-	-	18,659	-
BDL	Hartford	Medium	Connecticut	3	3	0	231	217	-6.1%	10,900	4,566	-58.1%
BNA	Nashville	Medium	Tennessee	2	3	1	65	67	3.1%	3,824	4,540	18.7%
CLE	Cleveland	Medium	Ohio	7	3	-4	366	165	-54.9%	22,877	9,370	-59.0%
CMH	Columbus, OH	Medium	Ohio	2	3	1	110	119	8.2%	4,201	5,003	19.1%
RDU	Raleigh/Durham	Medium	North Carolina	2	3	1	120	124	3.3%	12,045	12,802	6.3%
IND	Indianapolis	Medium	Indiana	2	2	0	61	64	4.9%	3,508	3,398	-3.1%
MCI	Kansas City	Medium	Missouri	2	2	0	35	34	-2.9%	2,078	1,964	-5.5%
MKE	Milwaukee	Medium	Wisconsin	1	2	1	108	62	-42.6%	4,428	4,060	-8.3%
ONT	Ontario	Medium	California	1	2	1	31	62	100.0%	4,375	10,846	147.9%
PBI	West Palm Beach	Medium	Florida	4	2	-2	352	62	-82.4%	7,935	2,684	-66.2%
RSW	Fort Myers	Medium	Florida	3	2	-1	31	53	71.0%	8,452	8,612	1.9%
SMF	Sacramento	Medium	California	4	2	-2	123	61	-50.4%	11,836	10,778	-8.9%
HOU	Houston Hobby	Medium	Texas	-	1	1	-	2	-	-	286	-
JAX	Jacksonville, FL	Medium	Florida	-	1	1	-	6	-	-	204	-
OGG	Kahului	Medium	Hawaii	1	1	0	4	36	800.0%	828	7,218	771.7%
<b>Average/Total - Medium Hub Airports</b>				<b>65</b>	<b>79</b>	<b>14</b>	<b>2,677</b>	<b>2,446</b>	<b>-8.6%</b>	<b>214,445</b>	<b>253,710</b>	<b>18.3%</b>

## International Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
SFB	Orlando Sanford	Small	Florida	3	10	7	40	70	75.0%	9,265	18,033	94.6%
PVD	Providence	Small	Rhode Island	1	3	2	62	21	-66.1%	1,116	4,759	326.4%
PSP	Palm Springs	Small	California	-	2	2	-	27	-	-	4,385	-
ACY	Atlantic City	Small	New Jersey	-	1	1	-	19	-	-	1,406	-
FAI	Fairbanks	Small	Alaska	2	1	-1	8	4	-50.0%	1,465	1,036	-29.3%
FAT	Fresno	Small	California	1	1	0	22	50	127.3%	3,060	8,904	191.0%
KOA	Kona	Small	Hawaii	-	1	1	-	4	-	-	696	-
LIH	Kauai Island	Small	Hawaii	-	1	1	-	5	-	-	870	-
MDT	Harrisburg	Small	Pennsylvania	1	1	0	58	62	6.9%	1,044	1,116	6.9%
MYR	Myrtle Beach	Small	South Carolina	-	1	1	-	9	-	-	1,207	-
RNO	Reno	Small	Nevada	-	1	1	-	8	-	-	1,432	-
ROC	Rochester, NY	Small	New York	1	1	0	54	93	72.2%	972	1,674	72.2%
SRQ	Sarasota	Small	Florida	-	1	1	-	9	-	-	873	-
SYR	Syracuse	Small	New York	-	1	1	-	93	-	-	1,674	-
ALB	Albany, NY	Small	New York	1	-	-1	85	-	-100.0%	1,530	-	-100.0%
HPN	Westchester County	Small	New York	1	-	-1	104	-	-100.0%	1,872	-	-100.0%
MEM	Memphis	Small	Tennessee	5	-	-5	161	-	-100.0%	20,893	-	-100.0%
MHT	Manchester, NH	Small	New Hampshire	1	-	-1	80	-	-100.0%	1,440	-	-100.0%
TUS	Tucson	Small	Arizona	1	-	-1	31	-	-100.0%	1,023	-	-100.0%
<b>Average/Total - Small Hub Airports</b>				<b>18</b>	<b>26</b>	<b>8</b>	<b>705</b>	<b>474</b>	<b>-32.8%</b>	<b>43,680</b>	<b>48,065</b>	<b>10.0%</b>
INT	Winston-Salem	Nonhub	North Carolina	-	1	1	-	1	-	-	214	-
KEH	Kenmore Air Harbor	Nonhub	Washington	2	1	-1	93	58	-37.6%	682	348	-49.0%
LKE	Seattle	Nonhub	Washington	1	1	0	155	141	-9.0%	1,240	1,326	6.9%
MFE	McAllen	Nonhub	Texas	1	1	0	28	18	-35.7%	1,400	864	-38.3%
ABE	Allentown	Nonhub	Pennsylvania	1	-	-1	83	-	-100.0%	1,494	-	-100.0%
BFI	Seattle	Nonhub	Washington	1	-	-1	58	-	-100.0%	348	-	-100.0%
BFL	Bakersfield	Nonhub	California	1	-	-1	13	-	-100.0%	1,560	-	-100.0%
DAB	Daytona Beach	Nonhub	Florida	2	-	-2	158	-	-100.0%	1,738	-	-100.0%
MLB	Melbourne, FL	Nonhub	Florida	1	-	-1	62	-	-100.0%	682	-	-100.0%
<b>Average/Total - Nonhub Airports</b>				<b>10</b>	<b>4</b>	<b>-6</b>	<b>650</b>	<b>218</b>	<b>-66.5%</b>	<b>9,144</b>	<b>2,752</b>	<b>-69.9%</b>



# **VIRGINIA COMMERCIAL AIR SERVICE STRATEGIC REVIEW**

## **Summary International 14\_15**

## International Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
JFK	New York Kennedy	Large	New York	112	117	5	8,012	8,246	2.9%	1,745,509	1,848,215	5.9%
MIA	Miami	Large	Florida	88	92	4	6,003	6,224	3.7%	1,046,922	1,104,825	5.5%
EWR	New York Newark	Large	New Jersey	79	78	-1	4,176	4,128	-1.1%	661,912	672,891	1.7%
IAH	Houston Bush	Large	Texas	69	72	3	3,991	4,303	7.8%	544,267	611,386	12.3%
LAX	Los Angeles	Large	California	67	71	4	4,586	5,079	10.8%	1,069,354	1,190,788	11.4%
ATL	Atlanta	Large	Georgia	69	70	1	3,417	3,398	-0.6%	599,756	612,165	2.1%
ORD	Chicago O'Hare	Large	Illinois	63	59	-4	4,484	4,095	-8.7%	721,897	716,771	-0.7%
DFW	Dallas/Fort Worth	Large	Texas	52	54	2	2,726	2,791	2.4%	423,523	444,480	4.9%
<b>IAD</b>	<b>Washington Dulles</b>	<b>Large</b>	<b>Virginia</b>	<b>48</b>	<b>47</b>	<b>-1</b>	<b>2,168</b>	<b>2,122</b>	<b>-2.1%</b>	<b>434,434</b>	<b>444,546</b>	<b>2.3%</b>
FLL	Fort Lauderdale	Large	Florida	40	44	4	1,930	2,085	8.0%	253,109	280,652	10.9%
SFO	San Francisco	Large	California	35	37	2	2,506	2,655	5.9%	569,630	640,317	12.4%
BOS	Boston	Large	Massachusetts	33	35	2	1,884	1,989	5.6%	321,408	346,887	7.9%
PHL	Philadelphia	Large	Pennsylvania	36	35	-1	1,805	1,751	-3.0%	277,974	273,385	-1.7%
MCO	Orlando	Large	Florida	25	32	7	1,266	1,438	13.6%	235,303	285,154	21.2%
CLT	Charlotte	Large	North Carolina	37	31	-6	1,283	1,126	-12.2%	212,568	185,831	-12.6%
LAS	Las Vegas	Large	Nevada	22	22	0	919	959	4.4%	171,543	177,476	3.5%
HNL	Honolulu	Large	Hawaii	21	21	0	968	1,045	8.0%	275,952	296,329	7.4%
DTW	Detroit	Large	Michigan	24	20	-4	1,178	1,055	-10.4%	193,170	187,577	-2.9%
SEA	Seattle	Large	Washington	19	19	0	1,650	1,940	17.6%	226,267	272,955	20.6%
DEN	Denver	Large	Colorado	20	17	-3	962	768	-20.2%	107,636	104,815	-2.6%
MSP	Minneapolis/St. Paul	Large	Minnesota	15	15	0	995	959	-3.6%	126,249	129,031	2.2%
PHX	Phoenix	Large	Arizona	14	14	0	682	638	-6.5%	92,373	92,269	-0.1%
BWI	Baltimore	Large	Maryland	9	12	3	322	402	24.8%	36,719	50,340	37.1%
SAN	San Diego	Large	California	8	9	1	241	233	-3.3%	41,854	38,824	-7.2%
SLC	Salt Lake City	Large	Utah	7	9	2	177	289	63.3%	20,105	36,817	83.1%
MDW	Chicago Midway	Large	Illinois	8	8	0	321	393	22.4%	32,910	44,133	34.1%
PDX	Portland, OR	Large	Oregon	4	7	3	330	362	9.7%	31,156	37,815	21.4%
LGA	New York LaGuardia	Large	New York	5	6	1	1,467	1,403	-4.4%	115,264	115,818	0.5%
TPA	Tampa	Large	Florida	5	6	1	144	168	16.7%	23,741	26,695	12.4%
<b>DCA</b>	<b>Washington National</b>	<b>Large</b>	<b>Virginia</b>	<b>5</b>	<b>5</b>	<b>0</b>	<b>381</b>	<b>360</b>	<b>-5.5%</b>	<b>25,672</b>	<b>24,410</b>	<b>-4.9%</b>
<b>Average/Total - Large Hub Airports</b>				<b>1,039</b>	<b>1,064</b>	<b>25</b>	<b>60,974</b>	<b>62,404</b>	<b>2.3%</b>	<b>10,638,177</b>	<b>11,293,597</b>	<b>6.2%</b>

## International Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
OAK	Oakland	Medium	California	4	7	3	91	115	26.4%	18,018	22,244	23.5%
SAT	San Antonio	Medium	Texas	5	5	0	212	263	24.1%	25,991	31,487	21.1%
CVG	Cincinnati	Medium	Ohio	5	5	0	142	166	16.9%	14,287	16,385	14.7%
PIT	Pittsburgh	Medium	Pennsylvania	4	5	1	145	167	15.2%	9,959	11,787	18.4%
STL	St. Louis	Medium	Missouri	5	5	0	86	102	18.6%	7,712	9,960	29.1%
ANC	Anchorage	Medium	Alaska	4	4	0	58	59	1.7%	9,862	9,953	0.9%
AUS	Austin	Medium	Texas	4	4	0	66	91	37.9%	9,854	13,410	36.1%
MSY	New Orleans	Medium	Louisiana	1	4	3	18	74	311.1%	1,350	8,516	530.8%
SJC	San Jose	Medium	California	3	4	1	120	143	19.2%	19,192	24,978	30.1%
SNA	Orange County	Medium	California	3	4	1	102	132	29.4%	14,075	18,659	32.6%
BDL	Hartford	Medium	Connecticut	2	3	1	196	217	10.7%	3,528	4,566	29.4%
BNA	Nashville	Medium	Tennessee	2	3	1	58	67	15.5%	3,000	4,540	51.3%
CLE	Cleveland	Medium	Ohio	3	3	0	123	165	34.1%	6,510	9,370	43.9%
CMH	Columbus, OH	Medium	Ohio	2	3	1	82	119	45.1%	3,260	5,003	53.5%
RDU	Raleigh/Durham	Medium	North Carolina	4	3	-1	121	124	2.5%	11,955	12,802	7.1%
IND	Indianapolis	Medium	Indiana	3	2	-1	63	64	1.6%	3,747	3,398	-9.3%
MCI	Kansas City	Medium	Missouri	2	2	0	32	34	6.3%	1,688	1,964	16.4%
MKE	Milwaukee	Medium	Wisconsin	2	2	0	53	62	17.0%	3,103	4,060	30.8%
ONT	Ontario	Medium	California	1	2	1	31	62	100.0%	5,094	10,846	112.9%
PBI	West Palm Beach	Medium	Florida	3	2	-1	74	62	-16.2%	3,092	2,684	-13.2%
RSW	Fort Myers	Medium	Florida	2	2	0	41	53	29.3%	7,452	8,612	15.6%
SMF	Sacramento	Medium	California	1	2	1	48	61	27.1%	7,842	10,778	37.4%
HOU	Houston Hobby	Medium	Texas	-	1	1	-	2	-	-	286	-
JAX	Jacksonville, FL	Medium	Florida	-	1	1	-	6	-	-	204	-
OGG	Kahului	Medium	Hawaii	1	1	0	31	36	16.1%	5,479	7,218	31.7%
<b>Average/Total - Medium Hub Airports</b>				<b>66</b>	<b>79</b>	<b>13</b>	<b>1,993</b>	<b>2,446</b>	<b>22.7%</b>	<b>196,050</b>	<b>253,710</b>	<b>29.4%</b>

## International Only

Airport	Airport Name	Hub Size	State	Nonstop Routes			Scheduled Departures			Scheduled Seats		
				Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
SFB	Orlando Sanford	Small	Florida	7	10	3	41	70	70.7%	11,931	18,033	51.1%
PVD	Providence	Small	Rhode Island	-	3	3	-	21	-	-	4,759	-
PSP	Palm Springs	Small	California	2	2	0	22	27	22.7%	3,486	4,385	25.8%
ACY	Atlantic City	Small	New Jersey	-	1	1	-	19	-	-	1,406	-
FAI	Fairbanks	Small	Alaska	1	1	0	4	4	0.0%	1,036	1,036	0.0%
FAT	Fresno	Small	California	1	1	0	48	50	4.2%	8,352	8,904	6.6%
KOA	Kona	Small	Hawaii	1	1	0	5	4	-20.0%	870	696	-20.0%
LIH	Kauai Island	Small	Hawaii	1	1	0	5	5	0.0%	870	870	0.0%
MDT	Harrisburg	Small	Pennsylvania	1	1	0	55	62	12.7%	990	1,116	12.7%
MYR	Myrtle Beach	Small	South Carolina	1	1	0	9	9	0.0%	1,224	1,207	-1.4%
RNO	Reno	Small	Nevada	-	1	1	-	8	-	-	1,432	-
ROC	Rochester, NY	Small	New York	1	1	0	57	93	63.2%	1,026	1,674	63.2%
SRQ	Sarasota	Small	Florida	-	1	1	-	9	-	-	873	-
SYR	Syracuse	Small	New York	1	1	0	61	93	52.5%	1,098	1,674	52.5%
ALB	Albany, NY	Small	New York	-	-	0	-	-	-	-	-	-
HPN	Westchester County	Small	New York	-	-	0	-	-	-	-	-	-
MEM	Memphis	Small	Tennessee	1	-	-1	4	-	-100.0%	600	-	-100.0%
MHT	Manchester, NH	Small	New Hampshire	-	-	0	-	-	-	-	-	-
TUS	Tucson	Small	Arizona	-	-	0	-	-	-	-	-	-
<b>Average/Total - Small Hub Airports</b>				<b>18</b>	<b>26</b>	<b>8</b>	<b>311</b>	<b>474</b>	<b>52.4%</b>	<b>31,483</b>	<b>48,065</b>	<b>52.7%</b>
INT	Winston-Salem	Nonhub	North Carolina	-	1	1	-	1	-	-	214	-
KEH	Kenmore Air Harbor	Nonhub	Washington	-	1	1	-	58	-	-	348	-
LKE	Seattle	Nonhub	Washington	1	1	0	31	141	354.8%	186	1,326	612.9%
MFE	McAllen	Nonhub	Texas	2	1	-1	32	18	-43.8%	1,578	864	-45.2%
ABE	Allentown	Nonhub	Pennsylvania	-	-	0	-	-	-	-	-	-
BFI	Seattle	Nonhub	Washington	-	-	0	-	-	-	-	-	-
BFL	Bakersfield	Nonhub	California	-	-	0	-	-	-	-	-	-
DAB	Daytona Beach	Nonhub	Florida	-	-	0	-	-	-	-	-	-
MLB	Melbourne, FL	Nonhub	Florida	-	-	0	-	-	-	-	-	-
<b>Average/Total - Nonhub Airports</b>				<b>3</b>	<b>4</b>	<b>1</b>	<b>63</b>	<b>218</b>	<b>246.0%</b>	<b>1,764</b>	<b>2,752</b>	<b>56.0%</b>



# **VIRGINIA COMMERCIAL AIR SERVICE STRATEGIC REVIEW**

## **State Summary 7\_15 Domestic**

## Domestic Only

State	Nonstop Routes**			Scheduled Departures - Total			Scheduled Seats - Total		
	Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
North Dakota	20	34	14	1,452	2,062	42.0%	88,497	130,676	47.7%
Washington	127	147	20	20,051	21,437	6.9%	2,044,242	2,468,889	20.8%
Louisiana	67	62	-5	7,361	6,774	-8.0%	592,439	669,113	12.9%
Massachusetts	104	103	-1	20,969	19,182	-8.5%	1,492,358	1,654,803	10.9%
South Carolina	67	82	15	6,705	5,757	-14.1%	445,170	491,975	10.5%
North Carolina	186	203	17	30,956	29,849	-3.6%	2,665,983	2,895,254	8.6%
Oregon	77	84	7	11,179	9,611	-14.0%	984,782	1,064,289	8.1%
Maine	31	23	-8	2,758	2,351	-14.8%	152,743	158,254	3.6%
Georgia	201	184	-17	42,145	36,642	-13.1%	4,569,728	4,706,193	3.0%
Montana	70	69	-1	4,348	3,599	-17.2%	242,964	249,242	2.6%
Minnesota	154	133	-21	18,475	16,724	-9.5%	1,872,411	1,887,465	0.8%
Texas	458	500	42	76,673	67,994	-11.3%	7,715,351	7,678,800	-0.5%
Alaska	83	72	-11	7,883	7,591	-3.7%	550,461	545,804	-0.8%
New Jersey	99	107	8	14,826	13,761	-7.2%	1,494,281	1,463,162	-2.1%
California	460	430	-30	83,035	68,903	-17.0%	9,310,895	9,105,423	-2.2%
Colorado	180	185	5	29,613	24,862	-16.0%	2,867,883	2,797,948	-2.4%
Maryland	65	72	7	10,640	9,272	-12.9%	1,312,374	1,272,348	-3.0%
Illinois	245	277	32	48,004	44,831	-6.6%	4,830,046	4,658,369	-3.6%
Kansas	29	20	-9	2,087	1,603	-23.2%	113,672	107,770	-5.2%
Florida	439	519	80	50,417	42,530	-15.6%	6,063,659	5,745,431	-5.2%
Iowa	34	39	5	3,793	2,867	-24.4%	202,664	189,672	-6.4%
New York	282	256	-26	45,453	37,178	-18.2%	4,132,322	3,860,161	-6.6%
South Dakota	24	26	2	1,905	1,664	-12.7%	100,741	92,878	-7.8%
Arizona	141	134	-7	32,792	28,799	-12.2%	3,267,170	3,002,200	-8.1%
Wyoming	20	23	3	1,945	1,293	-33.5%	96,217	88,408	-8.1%
Indiana	61	64	3	7,650	5,881	-23.1%	580,572	533,160	-8.2%
Michigan	198	168	-30	23,749	19,413	-18.3%	2,089,291	1,906,256	-8.8%
Utah	115	90	-25	14,245	10,133	-28.9%	1,242,680	1,129,762	-9.1%
Virginia	226	217	-9	31,876	26,872	-15.7%	2,743,949	2,475,001	-9.8%

## Domestic Only

State	Nonstop Routes**			Scheduled Departures - Total			Scheduled Seats - Total		
	Aug'07	Aug'15	Abs. Chg.	Aug'07	Aug'15	Pct. Chg.	Aug'07	Aug'15	Pct. Chg.
Hawaii	76	74	-2	15,633	12,064	-22.8%	1,768,852	1,541,190	-12.9%
Nevada	155	131	-24	19,852	15,325	-22.8%	2,663,403	2,297,045	-13.8%
Nebraska	38	34	-4	3,848	2,680	-30.4%	287,167	243,741	-15.1%
Kentucky	42	38	-4	4,574	3,384	-26.0%	309,323	261,248	-15.5%
Pennsylvania	203	187	-16	29,311	23,500	-19.8%	2,476,030	2,089,068	-15.6%
West Virginia	28	26	-2	1,788	1,073	-40.0%	64,934	54,735	-15.7%
Oklahoma	50	43	-7	5,472	3,861	-29.4%	449,143	375,293	-16.4%
Vermont	14	12	-2	1,389	1,081	-22.2%	84,784	69,739	-17.7%
Connecticut	37	26	-11	3,794	2,716	-28.4%	372,476	288,991	-22.4%
Idaho	43	36	-7	4,162	2,646	-36.4%	290,041	224,226	-22.7%
Wisconsin	97	60	-37	11,292	5,916	-47.6%	696,995	537,885	-22.8%
Missouri	145	122	-23	19,240	13,048	-32.2%	1,739,633	1,338,247	-23.1%
Arkansas	50	37	-13	4,237	3,028	-28.5%	266,784	201,592	-24.4%
Alabama	53	37	-16	5,121	3,651	-28.7%	371,522	267,210	-28.1%
Tennessee	165	116	-49	17,860	10,896	-39.0%	1,442,631	1,005,206	-30.3%
Ohio	275	159	-116	32,386	15,306	-52.7%	2,256,401	1,412,671	-37.4%
New Mexico	62	37	-25	5,047	3,081	-39.0%	471,155	292,668	-37.9%
Rhode Island	26	17	-9	3,876	1,958	-49.5%	304,300	182,974	-39.9%
Mississippi	28	26	-2	2,492	1,720	-31.0%	163,372	97,627	-40.2%
New Hampshire	22	16	-6	2,548	1,369	-46.3%	241,428	116,174	-51.9%

\*Average of each commercial airport in the state.

\*\* The sum of total number of nonstop routes from all commercial airports in the state.



# **VIRGINIA COMMERCIAL AIR SERVICE STRATEGIC REVIEW**

## **State Summary 14\_15 Domestic**

# Domestic Only

State	Nonstop Routes**			Scheduled Departures - Total			Scheduled Seats - Total		
	Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
Indiana	57	64	7	5,440	5,881	8.1%	461,471	533,160	15.5%
Ohio	157	159	2	15,194	15,306	0.7%	1,255,856	1,412,671	12.5%
Washington	122	147	25	17,131	21,437	25.1%	2,246,552	2,468,889	9.9%
Florida	483	519	36	39,742	42,530	7.0%	5,261,227	5,745,431	9.2%
Virginia	219	217	-2	26,593	26,872	1.0%	2,313,800	2,475,001	7.0%
Texas	454	500	46	66,394	67,994	2.4%	7,190,261	7,678,800	6.8%
Alaska	77	72	-5	7,779	7,591	-2.4%	511,350	545,804	6.7%
Maine	23	23	0	2,257	2,351	4.2%	148,366	158,254	6.7%
Tennessee	109	116	7	10,500	10,896	3.8%	945,847	1,005,206	6.3%
Oregon	83	84	1	9,737	9,611	-1.3%	1,002,058	1,064,289	6.2%
South Carolina	75	82	7	5,735	5,757	0.4%	463,838	491,975	6.1%
Michigan	177	168	-9	19,849	19,413	-2.2%	1,801,485	1,906,256	5.8%
Nevada	130	131	1	15,192	15,325	0.9%	2,179,027	2,297,045	5.4%
Georgia	191	184	-7	35,410	36,642	3.5%	4,464,615	4,706,193	5.4%
Massachusetts	103	103	0	19,388	19,182	-1.1%	1,570,477	1,654,803	5.4%
Louisiana	60	62	2	6,760	6,774	0.2%	635,800	669,113	5.2%
Illinois	275	277	2	45,879	44,831	-2.3%	4,442,116	4,658,369	4.9%
Maryland	70	72	2	9,078	9,272	2.1%	1,216,117	1,272,348	4.6%
New Jersey	113	107	-6	13,657	13,761	0.8%	1,400,332	1,463,162	4.5%
California	425	430	5	69,872	68,903	-1.4%	8,728,329	9,105,423	4.3%
Minnesota	133	133	0	16,766	16,724	-0.3%	1,813,339	1,887,465	4.1%
North Dakota	32	34	2	2,002	2,062	3.0%	125,960	130,676	3.7%
Arizona	139	134	-5	29,031	28,799	-0.8%	2,894,161	3,002,200	3.7%
Hawaii	78	74	-4	12,606	12,064	-4.3%	1,494,097	1,541,190	3.2%

# Domestic Only

State	Nonstop Routes**			Scheduled Departures - Total			Scheduled Seats - Total		
	Aug'14	Aug'15	Abs. Chg.	Aug'14	Aug'15	Pct. Chg.	Aug'14	Aug'15	Pct. Chg.
Idaho	36	36	0	2,568	2,646	3.0%	217,690	224,226	3.0%
Pennsylvania	176	187	11	23,170	23,500	1.4%	2,035,727	2,089,068	2.6%
New York	259	256	-3	37,743	37,178	-1.5%	3,765,208	3,860,161	2.5%
Utah	94	90	-4	10,908	10,133	-7.1%	1,113,253	1,129,762	1.5%
Kentucky	39	38	-1	3,390	3,384	-0.2%	257,456	261,248	1.5%
North Carolina	190	203	13	29,774	29,849	0.3%	2,854,014	2,895,254	1.4%
Nebraska	31	34	3	2,753	2,680	-2.7%	243,519	243,741	0.1%
South Dakota	26	26	0	1,824	1,664	-8.8%	93,040	92,878	-0.2%
New Hampshire	16	16	0	1,380	1,369	-0.8%	116,707	116,174	-0.5%
Missouri	117	122	5	13,379	13,048	-2.5%	1,346,605	1,338,247	-0.6%
Wisconsin	61	60	-1	6,339	5,916	-6.7%	541,591	537,885	-0.7%
Mississippi	20	26	6	1,674	1,720	2.7%	98,952	97,627	-1.3%
Kansas	24	20	-4	1,709	1,603	-6.2%	109,497	107,770	-1.6%
Iowa	36	39	3	2,806	2,867	2.2%	193,059	189,672	-1.8%
Vermont	11	12	1	1,108	1,081	-2.4%	71,403	69,739	-2.3%
Colorado	199	185	-14	26,507	24,862	-6.2%	2,869,372	2,797,948	-2.5%
West Virginia	24	26	2	1,180	1,073	-9.1%	56,390	54,735	-2.9%
Alabama	40	37	-3	3,552	3,651	2.8%	279,953	267,210	-4.6%
New Mexico	35	37	2	3,174	3,081	-2.9%	307,448	292,668	-4.8%
Oklahoma	41	43	2	4,153	3,861	-7.0%	395,186	375,293	-5.0%
Rhode Island	19	17	-2	2,112	1,958	-7.3%	193,822	182,974	-5.6%
Arkansas	39	37	-2	3,108	3,028	-2.6%	214,002	201,592	-5.8%
Wyoming	27	23	-4	1,492	1,293	-13.3%	93,968	88,408	-5.9%
Connecticut	26	26	0	2,914	2,716	-6.8%	307,241	288,991	-5.9%
Montana	71	69	-2	4,071	3,599	-11.6%	278,678	249,242	-10.6%

\*Average of each commercial airport in the state.

\*\* The sum of total number of nonstop routes from all commercial airports in the state.



# VIRGINIA COMMERCIAL AIR SERVICE STRATEGIC REVIEW

## Number of Departures by Stage Length

## Number of Departures by Stage Length

Hub Carrier	Hub	Hub/City Name	0-500 Miles				501-1,250 Miles				1,251+ Miles			
			2004	2007	2010	2015	2004	2007	2010	2015	2004	2007	2010	2015
American/US Airways	CLT	Charlotte	111,140	124,785	130,220	136,780	45,527	53,774	60,987	74,232	7,886	10,090	12,111	15,015
American/US Airways	DCA	Washington National	47,142	48,897	49,260	54,102	11,146	15,568	14,178	29,542	-	1,206	1,448	2,179
American/US Airways	DFW	Dallas/Fort Worth	81,844	91,859	89,398	95,209	118,538	135,593	132,715	139,577	36,005	34,168	28,967	29,436
American/US Airways	JFK	New York Kennedy	4,459	6,645	8,497	7,262	2,067	3,056	3,908	7,207	12,805	9,681	8,551	10,884
American/US Airways	LAX	Los Angeles	25,899	21,769	16,568	20,460	7,467	8,848	8,713	15,274	21,596	19,619	17,243	27,636
American/US Airways	MIA	Miami	8,057	9,387	11,766	12,074	33,546	35,797	38,322	49,074	6,668	7,100	8,106	11,323
American/US Airways	ORD	Chicago O'Hare	74,262	70,872	68,199	71,083	82,159	77,328	67,976	72,449	24,630	19,023	16,156	17,978
American/US Airways	PHL	Philadelphia	84,417	95,694	96,314	88,813	33,030	32,492	30,882	38,922	12,891	13,466	14,275	17,725
American/US Airways	PHX	Phoenix	43,334	35,743	35,267	35,126	38,884	28,751	28,195	32,909	22,704	22,178	24,609	28,111
Delta/Northwest	ATL	Atlanta	155,642	140,680	166,613	142,472	144,354	144,005	133,959	141,397	29,703	30,242	28,612	27,265
Delta/Northwest	CVG	Cincinnati	124,264	76,709	31,083	11,556	70,603	45,721	21,103	10,942	11,205	8,683	4,227	1,948
Delta/Northwest	DTW	Detroit	116,752	97,645	93,725	74,070	59,404	55,553	56,340	47,879	10,036	8,108	10,058	10,548
Delta/Northwest	JFK	New York Kennedy	6,049	28,630	18,739	15,723	13,996	13,608	14,407	16,985	6,133	9,199	11,679	16,163
Delta/Northwest	LAX	Los Angeles	-	6,946	4,485	17,661	3,650	5,673	2,887	10,681	10,583	12,179	16,649	20,526
Delta/Northwest	LGA	New York LaGuardia	17,376	14,885	15,142	30,154	22,007	24,121	35,184	48,830	986	338	30	4,295
Delta/Northwest	MEM	Memphis	47,926	45,784	41,994	3,883	26,951	29,049	25,849	2,701	2,723	2,593	4,084	392
Delta/Northwest	MSP	Minneapolis/St. Paul	85,126	68,022	58,411	48,663	75,078	61,204	60,035	59,600	25,968	22,447	20,830	21,187
Delta/Northwest	SEA	Seattle	-	-	-	4,849	1,620	3,232	2,825	16,079	4,629	4,065	7,392	10,326
Delta/Northwest	SLC	Salt Lake City	50,642	43,481	39,028	25,998	48,554	56,354	51,584	41,176	11,906	14,970	14,007	12,103
United/Continental	CLE	Cleveland	51,173	51,433	39,237	11,821	20,181	19,268	14,916	5,208	3,886	4,121	3,272	1,651
United/Continental	DEN	Denver	39,100	42,480	38,935	37,473	84,190	89,227	83,746	79,821	18,600	18,899	13,943	13,970
United/Continental	EWR	New York Newark	40,680	40,556	43,134	42,465	48,119	51,590	43,447	44,906	22,712	25,729	22,289	26,008
United/Continental	IAD	Washington Dulles	61,628	59,640	57,286	39,302	19,664	20,802	18,389	16,498	14,963	17,233	15,917	14,001
United/Continental	IAH	Houston Bush	67,191	85,548	70,890	58,391	78,523	98,239	85,521	74,293	28,434	34,793	27,740	28,248
United/Continental	LAX	Los Angeles	57,387	52,531	36,181	20,044	10,992	13,063	12,896	9,516	19,803	17,005	16,167	23,500
United/Continental	ORD	Chicago O'Hare	85,524	84,253	79,885	78,652	102,221	97,629	93,085	87,478	31,475	25,765	20,344	19,303
United/Continental	SFO	San Francisco	46,650	50,454	45,278	39,263	14,583	15,620	15,624	16,314	20,469	19,235	20,051	35,825



# **VIRGINIA COMMERCIAL AIR SERVICE STRATEGIC REVIEW**

## **Number of Non-stop Points Served**

## Number of Nonstop Points Served

Hub	Hub/City Name	Low Cost Carrier (LCC)			Ultra Low Cost Carrier (ULCC)		
		2004	2015	Change	2004	2015	Change
ATL	Atlanta	45	44	-1	1	25	24
CLE	Cleveland	8	10	2	0	17	17
CLT	Charlotte	1	7	6	0	3	3
CVG	Cincinnati	0	0	0	0	21	21
DCA	Washington National	3	25	22	4	1	-3
DEN	Denver	3	61	58	50	64	14
DFW	Dallas/Fort Worth	6	1	-5	1	27	26
DTW	Detroit	7	11	4	13	20	7
EWR	New York Newark	2	16	14	0	0	0
IAD	Washington Dulles	43	6	-37	1	17	16
IAH	Houston Bush	1	0	-1	1	25	24
JFK	New York Kennedy	27	67	40	0	0	0
LAX	Los Angeles	24	30	6	7	36	29
LGA	New York LaGuardia	4	17	13	6	8	2
MEM	Memphis	1	6	5	0	6	6
MIA	Miami	3	0	-3	0	6	6
MSP	Minneapolis/St. Paul	2	10	8	2	17	15
ORD	Chicago O'Hare	1	3	2	6	36	30
PHL	Philadelphia	20	13	-7	2	13	11
PHX	Phoenix	41	52	11	3	9	6
SEA	Seattle	15	23	8	1	2	1
SFO	San Francisco	1	15	14	1	4	3
SLC	Salt Lake City	16	12	-4	6	4	-2

Note: LCC includes Southwest (WN), AirTran (FL), JetBlue (B6), and Independence Air (DH).

ULCC includes Spirit (NK), Allegiant (G4), and Frontier (F9).



# **VIRGINIA COMMERCIAL AIR SERVICE STRATEGIC REVIEW**

## **Changes in Share of U.S. Total**

## Changes in Share of the U.S. Total

Domestic O&D Traffic					International O&D Traffic					Total Enplanements				
Hub	Hub/City Name	2004	2014	Change in Pct Point	Hub	Hub/City Name	2004	2014	Change in Pct Point	Hub	Hub/City Name	2004	2014	Change in Pct Point
LAX	Los Angeles	3.6%	3.9%	0.3	JFK	New York Kennedy	12.6%	13.6%	0.9	ATL	Atlanta	5.8%	6.1%	0.3
DEN	Denver	2.2%	3.1%	0.9	LAX	Los Angeles	10.6%	9.1%	-1.5	LAX	Los Angeles	4.2%	4.5%	0.3
ORD	Chicago O'Hare	3.0%	3.0%	-0.1	MIA	Miami	7.9%	7.0%	-0.9	ORD	Chicago O'Hare	5.1%	4.4%	-0.7
SFO	San Francisco	1.9%	2.9%	1.0	SFO	San Francisco	5.3%	5.4%	0.1	DFW	Dallas/Fort Worth	3.9%	4.0%	0.1
ATL	Atlanta	2.9%	2.8%	-0.1	EWR	New York Newark	4.7%	4.8%	0.1	DEN	Denver	2.9%	3.5%	0.6
SEA	Seattle	2.2%	2.5%	0.3	ORD	Chicago O'Hare	4.2%	4.2%	0.0	JFK	New York Kennedy	2.6%	3.3%	0.7
LGA	New York LaGuardia	2.5%	2.4%	0.0	IAD	Washington Dulles	2.6%	2.9%	0.3	SFO	San Francisco	2.2%	3.0%	0.7
DFW	Dallas/Fort Worth	2.3%	2.4%	0.1	IAH	Houston Bush	2.4%	2.7%	0.4	CLT	Charlotte	1.8%	2.9%	1.1
PHX	Phoenix	2.6%	2.3%	-0.2	ATL	Atlanta	2.2%	1.9%	-0.3	PHX	Phoenix	2.8%	2.7%	-0.1
JFK	New York Kennedy	1.9%	2.0%	0.1	DFW	Dallas/Fort Worth	1.6%	1.8%	0.2	IAH	Houston Bush	2.4%	2.6%	0.1
EWR	New York Newark	2.0%	1.9%	-0.2	SEA	Seattle	1.5%	1.7%	0.2	MIA	Miami	2.0%	2.4%	0.4
MSP	Minneapolis/St. Paul	1.6%	1.8%	0.1	PHL	Philadelphia	1.4%	1.3%	-0.1	SEA	Seattle	2.0%	2.3%	0.3
DCA	Washington National	1.4%	1.7%	0.3	DEN	Denver	1.1%	1.3%	0.2	EWR	New York Newark	2.2%	2.3%	0.0
PHL	Philadelphia	1.8%	1.6%	-0.1	LGA	New York LaGuardia	1.5%	1.3%	-0.2	MSP	Minneapolis/St. Paul	2.4%	2.2%	-0.2
DTW	Detroit	1.6%	1.5%	-0.1	DTW	Detroit	1.3%	1.2%	-0.1	DTW	Detroit	2.4%	2.1%	-0.3
IAH	Houston Bush	1.3%	1.4%	0.1	PHX	Phoenix	1.0%	1.2%	0.2	PHL	Philadelphia	2.0%	1.9%	0.0
SLC	Salt Lake City	1.1%	1.1%	0.0	MSP	Minneapolis/St. Paul	0.8%	1.1%	0.2	LGA	New York LaGuardia	1.7%	1.8%	0.0
MIA	Miami	1.0%	1.1%	0.1	DCA	Washington National	0.7%	0.7%	0.0	SLC	Salt Lake City	1.3%	1.3%	0.1
CLT	Charlotte	0.7%	1.1%	0.4	CLT	Charlotte	0.6%	0.7%	0.1	IAD	Washington Dulles	1.5%	1.3%	-0.2
IAD	Washington Dulles	1.2%	0.8%	-0.3	SLC	Salt Lake City	0.5%	0.5%	0.0	DCA	Washington National	1.1%	1.3%	0.2
CLE	Cleveland	0.8%	0.6%	-0.2	CLE	Cleveland	0.4%	0.4%	0.0	CLE	Cleveland	0.8%	0.5%	-0.3
CVG	Cincinnati	0.5%	0.4%	-0.1	CVG	Cincinnati	0.4%	0.3%	-0.1	CVG	Cincinnati	1.5%	0.4%	-1.2
MEM	Memphis	0.4%	0.3%	-0.1	MEM	Memphis	0.3%	0.2%	-0.1	MEM	Memphis	0.7%	0.2%	-0.5



**InterVISTAS**

a company of Royal HaskoningDHV

Prepared by

InterVISTAS Consulting Inc.

1150 Connecticut Ave, NW

Suite 601

Washington, DC 20036

USA

Telephone: +1-202-688-2220

Facsimile: +1-202-688-2225