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An Analysis of Current Scheduled Commercial Air Service in Florida

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The Importance of Scheduled Commercial Airline Service to Florida

Scheduled commercial airline service enables Florida to be a leader in world economic markets.

Florida communities rely on commercial airline service for business retention and attraction. The availability of scheduled commercial airlines service typically ranks among the top two or three factors a business/industry considers when it reviews its locational opportunities.

Commercial airline service is vital to Florida tourism; it is estimated that annually over 50 percent all visitors to Florida arrive via air travel.

A substantial amount of cargo moves in the "belly-hold" of commercial aircraft; approximately 29 percent of the total cargo enplaned in Florida leaves in the belly of a commercial aircraft versus on an all cargo carrier.

Distances in Florida between many of its major centers of population make air travel an essential mode of transportation for intra-state travel.

Industry Overview and Trends

1978 marked the deregulation of the domestic airlines in the U.S. Prior to 1978, the Civil Aeronautics Board (CAB) regulated service points, service frequency, types of planes used to provide service, and fares. This regulation guaranteed airline profitability.

Airline deregulation led to carriers making service decisions based on traditional supply and demand concepts. Carriers are in the business to make a profit; they continually review existing and potential markets to rationalize their service. Adjustments are made to direct airline resources to those markets where the carrier determines it has the greatest potential to make a profit.

Some of the lasting legacies of deregulation in the airline industry are:

1. The development of the connecting "hub and spoke" concept
2. The proliferation of the regional/commuter carriers to provide a "feed" to their major/national code-sharing partners.
3. The consolidation of the nation's domestic carriers through mergers, acquisitions, bankruptcies, and strategic alliances.
4. The emergence of "low fare" carriers.

Characteristics Impacting Commercial Airline Service in Florida

Florida looses a very small percentage of its originating air travelers to competing commercial service airports in neighboring states. In other words, few people leave Florida in their car to drive to a commercial airport in a neighboring state to initiate their airline trip.

Florida is typically viewed by the airlines as a "low yield" market. This means that assuming the airline could carry the same volumes of passenger traffic in other markets, they may be able to achieve a higher profit.

Florida markets provide lower yields for the following reasons:

1. Several markets have intense competition between the number of carriers that provide scheduled airline service.
2. The "leisure" nature of a high percentage of the passengers who fly into the Florida markets equates to lower cost tickets. For most Florida markets, the percentage of vacation/leisure related is much higher than the national average.
3. Many passengers on planes to Florida markets are non-revenue travelers flying on frequent flyer redemptions.

The average load factor (the ratio of passengers to available seats on the aircraft) for carriers in the U.S. has surpassed 70 percent. Carriers to Florida cities typically have to operate at a higher load factor, meaning seats may not be available to certain markets, to compensate for lower yields.

Carriers have traditionally worked hard to maintain their market shares of the passengers that they carry to and from Florida. Competition for the Florida traveler lead to the creation of the "airline-within-an-airline" concept such as Delta Express and USAirways' MetroJet.

The regional jet is the fastest growing segment of the commercial airline industry. High operating costs and a more limited number of seats, which restrict the availability of discounted seats on each flight, indicates that this plane may not necessarily be a good match for Florida's leisure market. The cargo/baggage carrying capacity of the regional jet can result in bags/sporting equipment being left behind when a full passenger contingent is enplaned.

The speed of the regional jet does, however, make this aircraft ideal for serving the instate needs of business travelers who are typically willing to pay a higher fare for airline service.

Florida Demand Patterns and Fares

Based on information obtained from the U.S. Department of Transportation for calendar year 1999, Florida's commercial service airports were analyzed to identify travel patterns for all domestic originating passengers. **Exhibits 1-7** summarize the following information for each of the commercial airports, for six geographic areas of in State and for the State as a whole:

1. Number of annual domestic passengers originating at each airport bound for cities within eight geographic regions of the U.S.
2. Percent of originating passengers by airport and by region bound for destinations in eight geographic regions of the U.S.
3. The average one-way fare paid by originating passengers to reach destinations within the eight geographic regions of the U.S.

Exhibit 7 compares statewide data on travel patterns and fares to U.S. averages for the same indicators. Based on the information presented in Exhibits 1-7, the following conclusions can be drawn:

Travel Patterns

1. Over 80 percent of all domestic passengers who originate their travel at a Florida commercial service airport are bound for a location that is east of the Mississippi River.
2. For almost all airports and all regions of Florida, cities in the Northeastern part of the U.S. are the number one travel destination.
3. Following travel to cities in the Northeast, cities in the Midwest and Southeast rank as the second and third most heavily traveled destinations for domestic air travelers who originate in Florida.
4. Nationally, about 25 percent of all domestic originations are bound for cities in the Southwestern part of the U.S.; in Florida, travel to cities in the Southwest accounts for roughly 8 percent of all annual domestic originating passengers.
5. Travel to destinations in the Northwest rank last from each of the regions in Florida.

Fares

1. The average one-way fare paid by all domestic originating passengers in Florida was $128.89; nationally, the average one-way fare paid by all domestic originating passengers was $148.68.
2. Average one-way fares paid by domestic originating passengers in Florida are generally below the national average except for travel from Florida to cities located in the Northwest and the Southwest. Less competition on service to destinations in these regions most likely is largely responsible for the higher than average fares.
3. Regionally, airports in the east central (Orlando, Melbourne, and Daytona) and the west central (Tampa, St. Petersburg, and Sarasota) portions of the State have lower fares than the State average when travel to all destinations is considered.
4. The highest one-way average fares are reported at those airports in the northwestern part of the State (Pensacola, Ft. Walton, Beach and Panama City). The average one-way fare from these airports is $160.60; statewide the average one-way fare is $128.90.
5. For travel to Florida's top three regional domestic destinations, average one-way fares are below the national average:

Destination	Florida Avg. One-Way Fare	National Avg. One-Way Fare
Northeast	$118	$168
Midwest	$124	$151
Southeast	$110	$145

6. Excluding Orlando (Florida's largest domestic market, dominated by low fares), the average one-way fare paid by domestic passengers originating at all other Florida airports combined was $132.93, remaining well below the national average ($148.68). This average fare is $4.04 higher than the average one-way fare by originating passengers at all Florida airports, including Orlando.

Southeast Florida Region

Fort Lauderdale Hollywood International

- Current non-stop service includes 1,344 weekly departures to destinations throughout the U.S.
- Market has 361 weekly departures to 7 different cities in Florida.
- Turboprop aircraft are used on some instate routes; approximately 2 percent of all seats that depart each week are on turboprop aircraft.
- Almost 97 percent of the market's weekly domestic seats are on Major/National jet aircraft.
- 27 percent of the market's weekly departures are to other locations in Florida.
- Current scheduled non-stop domestic service is well matched to domestic originating passenger demand:

	1999 Domestic Passenger Originations	July 2000 Scheduled Domestic Departures
Northeast	44%	36%
Midwest	16%	12%
Southeast	20%	17%
Southwest	8%	2%
South Central	6%	6%
Mid-South	4%	2%
North Central	1%	0%
Northwest	1%	0%

Miami International Airport

- Current non-stop service includes 2,000 weekly departures to destinations throughout the U.S.
- Miami has over 700 weekly scheduled departures to 9 different cities in Florida.
- Approximately 9 percent of the seats leaving Miami each week are on turboprop aircraft; these seats are destined to other locations in Florida and nearby islands.
- Almost 90 percent of the market's weekly domestic scheduled seats are on Major/National jets.
- Over 36 percent of the market's weekly scheduled domestic departures are to other cities in Florida.
- Current non-stop domestic service is fairly well matched to originating domestic passenger demand:

	1999 Domestic Passenger Originations	July 2000 Scheduled Domestic Departures
Northeast	35%	23%
Midwest	16%	10%
Southeast	22%	14%

Southwest	11%	5%
South Central	8%	9%
Mid South	4%	2%
North Central	2%	1%
Northwest	1%	>1%

- A very large proportion of Miami's scheduled commercial flight departures are to international destinations. In 1999, this airport enplaned over 16 million passengers and out of this total, 12 million are international enplanements.

West Palm Beach International

- This market has 589 weekly scheduled departures to various destinations in the U.S.
- There are 160 weekly scheduled departures to different locations in Florida; these instate flights account for over 27 percent of the market's weekly scheduled domestic departures.
- Over 92 percent of the weekly scheduled domestic seats are on Major/National jets.
- Current non-stop domestic service could be better matched to originating domestic passenger demand:

	1999 Domestic Passenger Originations	July 2000 Scheduled Domestic Departures
Northeast	57%	38%
Midwest	16%	7%
Southeast	11%	20%
Southwest	7%	0%
South Central	5%	7%
Mid South	3%	0%
North Central	1%	0%
Northwest	1%	0%

Key West International Airport

- This market currently has no scheduled service to destinations outside of Florida.
- All weekly scheduled seats that depart this market are on turboprop aircraft.
- The market has 325 weekly scheduled departures to 6 different locations in Florida.
- The market's top domestic travel destinations are in the Southeast, the Northeast, and the Midwest; combined, domestic originating passenger demand to cities in these regions accounts for over 86 percent of the market's annual enplaned passenger demand.

Marathon Airport

- The carrier providing service to this airport terminated flights in the spring of 2000.
- During 1999, almost 20,000 passengers boarded flights from this airport.
- Top domestic markets for this airport are in the Northeast, the Southeast, and the Midwest; demand for travel to cities in these regions accounted for 85 percent of the market's domestic originations in 1999.

West Central Florida Region

Orlando International Airport

- This airport has 2,827 scheduled departures each week to destinations throughout the U.S.
- The market also has a high number of weekly departures to cities in Florida with 637 weekly flights.
- Almost 23 percent of the market's scheduled weekly departures are to destinations in Florida.
- Almost 94 percent of the scheduled weekly seats from Orlando are on Major/National jets.
- Seats on turboprop aircraft account for about 4 percent of all seats that leave the market each week; these aircraft are used to serve other destinations in Florida.
- The market's current scheduled non-stop domestic service is well matched to originating passenger demand:

	1999 Domestic Passenger Originations	July 2000 Scheduled Domestic Departures
Northeast	38%	31%
Midwest	22%	17%
Southeast	13%	12%
Southwest	9%	4%
South Central	5%	6%
Mid South	5%	6%
North Central	3%	2%
Northwest	2%	0%

Melbourne International

- This market currently has non-stop service to two domestic connecting hubs beyond Florida; the market has 63 weekly scheduled departures.
- Melbourne does not currently have non-stop service to any instate Florida destinations.
- All seats that leave this market each week are on Major/National jet aircraft.
- Non-stop domestic service in this market could be better matched to originating domestic passenger demand:

	1999 Domestic Passenger Originations	July 2000 Scheduled Domestic Departures
Northeast	50%	11%
Midwest	14%	0%
Southeast	15%	89%

Daytona Beach

- Current non-stop domestic service includes flights to 2 airline connecting hubs beyond Florida.
- All weekly scheduled seats departing this market are on Major/National or regional jet aircraft.
- There are no scheduled flights to other Florida destinations.
- Current scheduled departures could be more well matched to the market's originating domestic passenger demand:

	1999 Domestic Passenger Originations	July 2000 Scheduled Domestic Departures
Northeast	42%	12.5%
Southeast	14%	87.5%
Midwest	22%	0.0%

Orlando Sanford Airport

- Scheduled commercial airline service to this airport is relatively new; as a result, a history for originating domestic passengers in this market is not available.
- The market has 19 scheduled weekly departures; all weekly scheduled seats that leave the market are on Major/National jet aircraft.
- Sanford has no scheduled flights to other cities in Florida.
- All scheduled flights are to destinations in the Northeast or Midwest.
- In addition to its new scheduled service, this airport accommodates a notable amount of both domestic and international charter service that is not reflected in this analysis.

East Central Florida Region

Tampa International Airport

- This market has 1,975 weekly scheduled departures to locations throughout the U.S.
- 10 percent of these departures are to other locations in Florida; this market has service to 13 other locations in Florida.
- Almost 92 percent of the weekly seats that depart this market each week are on Major/National jet aircraft.
- This market currently has no scheduled service on regional jets.
- 8 percent of the scheduled weekly seats are on turboprop aircraft; these flights serve primarily other destinations in Florida.
- Current non-stop domestic service is fairly well matched to some originating passenger demand and could be better matched in other instances:

	1999 Domestic Passenger Originations	July 2000 Scheduled Domestic Departures
Northeast	33%	23%
Midwest	21%	12%
Southeast	19%	12%
South Central	9%	2%
Mid South	6%	6%
North Central	2%	>1%
Northwest	2%	0%

Sarasota Bradenton International Airport

- This market has 171 scheduled departures each week.
- 64 of the market's weekly departures are to other cities in Florida.
- The market has non-stop weekly scheduled flights to 3 cities in Florida.
- 83 percent of the scheduled weekly seats that leave this market are on Major/National jet aircraft.
- Seats on turboprops account for approximately 11 percent of the total that departs the market each week and regional jet seats make up the remaining 6 percent.
- Current non-stop scheduled domestic departures could be much better matched to the market's originating passenger demand:

	1999 Domestic Passenger Originations	July 2000 Scheduled Domestic Departures
Northeast	36%	4%
Midwest	38%	14%
Southeast	11 %	41%
Southwest	6%	0%
South Central	4%	4%
Mid South	3%	0%
North Central	2%	0%
Northwest	1%	0%

St. Petersburg-Clearwater International

- This market has 21 weekly scheduled departures.
- The destinations of all of its scheduled flights are in the Midwest; current service is well matched to the demands of the market's originating domestic passengers.
- The market has no scheduled instate service.
- All of the schedule seats that leave this market each week are on Major/national jets.

Southwest Florida Region

Southwest Florida International

- Current non-stop domestic service is available to 22 locations; the market has 421 weekly scheduled departures.
- 91 percent of all weekly scheduled seats departing this market are on Major/National or regional jet aircraft.
- 9 percent of the market's weekly scheduled seats are on turboprop aircraft that fly primarily to other Florida cities.
- Service is available to four cities in Florida; the market has 131 scheduled weekly departures to Florida destinations.
- The market's existing scheduled domestic departures are somewhat matched to the top demands of the market's domestic originating passengers:

	1999 Domestic Passenger Originations	July 2000 Scheduled Domestic Departures
Northeast	37%	20%
Midwest	37%	22%
Southeast	9%	25%

Naples Municipal

- This market has 73 scheduled weekly departures.
- All scheduled seats that leave this market each week are on turboprop aircraft.
- This market has no service beyond Florida.
- Scheduled weekly service is available to 4 different cities in Florida.
- 81 percent of the originating domestic passengers in this market are bound for destinations in the Northeast, the Southeast, or the Midwest.
- The market's scheduled domestic service could be better matched to originating passenger needs.

Northwest Florida Region

Pensacola Regional Airport

- This market has 265 weekly scheduled departures to 10 different destinations.
- The market has 84 weekly flights to 3 cities in Florida.
- 80 percent of the seats leaving this market each week are on Major/National or regional jet aircraft.
- 20 percent of the seats are turboprop aircraft.
- The market's current scheduled non-stop service could be much better match to originating passenger demand:

	1999 Domestic Passenger Originations	July 2000 Scheduled Domestic Departures
Northeast	22%	0%
Midwest	16%	0%
Southeast	29%	29%
Southwest	11%	0%
South Central	11%	11%
Mid South	4%	28%
North Central	3%	0%
Northwest	3%	0%

Fort Walton Beach

- Current weekly service includes scheduled flights to 2 connecting hubs beyond Florida; the market has 181 scheduled weekly departures.
- The market has 49 weekly scheduled departures to 3 cities in Florida.
- 45 percent of all seats departing this airport on a weekly basis are on turboprop aircraft.
- 55 percent of the scheduled seats each week are on Major/National or regional jet aircraft.
- Approximately 42 percent of this airport's originating domestic passengers are bound for cities in the Northeast and Midwest; non-stop scheduled service is not currently available to any destinations in these two regions.
- Existing scheduled service is to the Southeast and the Mid South; this service is matched to the demands of the market's originating domestic passengers.

Panama City Bay County International

- This market has 139 weekly departures to 5 destinations.
- Much of the market's service is "tag" service with Ft. Walton Beach.
- The market has 49 scheduled departures to cities in Florida; 30 of these, however, are the "tag" service with Ft. Walton Beach.
- 94 percent of the seats leaving this market are on turboprop aircraft; the remainder is on regional jets.
- The market has service to two domestic connecting hubs beyond Florida; these hubs are in the Southeast and the Mid South.
- Almost 50 percent of this market's domestic originating passengers are bound to locations in the Northeast and Midwest; non-stop scheduled service is not presently available to any destinations in these regions.

Northeast Region

Jacksonville International Airport

- This airport has non-stop scheduled flights to 27 different domestic locations.
- 186 weekly departures are also provided to 5 different cities in Florida.

- 87 percent of all seats that are scheduled from this market each week are on Major/National jet aircraft.
- 7 percent of the scheduled weekly seats are on turboprop aircraft that serve other cities in Florida, the remaining 6 percent of the scheduled seats each week are on regional jet aircraft.
- Scheduled non-stop domestic departures from this market are generally well matched to demand from the market's originating domestic passengers:

	1999 Domestic Passenger Originations	July 2000 Scheduled Domestic Departures
Northeast	28%	20%
Midwest	17%	13%
Southeast	25%	26%
Southwest	9%	0%
South Central	10%	9%
Mid South	8%	7%
North Central	2%	0%
Northwest	1%	0%

Tallahassee Regional Airport

- Tallahassee has 335 scheduled weekly departures.
- 74 percent of its weekly departures are to other cities in Florida; the market has non-stop scheduled service to 7 Florida cities.
- Almost 48 percent of this market's scheduled weekly seats are on turboprop aircraft.
- 36 percent of the seats each week are on Major/National jets; the remaining 6 percent of the scheduled seats each week are on regional jets.
- Beyond locations in Florida, the market's only scheduled departures are to 2 domestic connecting hub airports in the Southeast.
- Over 27 percent of the market's domestic passenger originations are bound for cities in either the Northeast or the Midwest; non-stop service is currently not available to either region.
- The market's domestic service could be better matched to its originating passenger demand.

Gainesville Regional

- This market has scheduled non-stop service two 2 connecting hubs beyond Florida; the market has 93 scheduled weekly departures.
- Current scheduled non-stop service includes service to one location in Florida.
- Over 55 percent of the weekly scheduled seats that depart this market are on turboprop aircraft.
- Over 47 percent of this market's originating domestic passengers are bound for destinations in the Northeast or Midwest; scheduled non-stop flights are not currently available to any locations in these two regions.

- 82 percent of the market's scheduled weekly seats depart for cities in the Southeast; the remaining 18 percent are bound for an instate location.

Intrastate Scheduled Airline Service

Given the distances between many of its primary cities, scheduled commercial air service is an important mode for instate travel. **Table 23** was complied to summarize available weekly service. The following can be summarized from the information presented in this table:

1. There are 3,852 flights each week that tie together the major cities of Florida.
2. Tampa, Miami and Orland have the greatest number of these instate flights.
3. Tampa and Orlando have instate service to the highest number of destinations.
4. Gainesville has the fewest number of scheduled instate flights.
5. Four airports, Melbourne, Daytona Beach, Orlando Sanford, and St. Petersburg-Clearwater have no scheduled instate commercial service.
6. 13 percent of all weekly instate scheduled departure are on Major/National jet aircraft, while 5 percent of the currently weekly instate departures are on regional jets.
7. 82 percent of all scheduled departures between Florida's primary cities are on turboprop aircraft.

International Service

Aside from scheduled service to destinations in the U.S., several of Florida's commercial airports also have non-stop service to international destinations. **Table 24** provides information that summarizes Florida's existing non-stop international commercial airline service. From this table, the following conclusions can be drawn:

1. 8 airports in Florida have scheduled flights to international destinations; this includes service to the islands from Watson Island seaplane base that is near Miami. The Watson Island service is not included elsewhere in this analysis.
2. International service summarized in Table 23 does not include international charter service for any of the airports, including Orlando Sanford. The Orlando Sanford accommodates a notable number of international charter flights.
3. Florida has 2,273 weekly scheduled departures to destinations beyond the U.S.
4. 56 percent of the scheduled international departures are to destinations in the Caribbean.
5. About 30 percent of the scheduled international departures from Florida airports each week are to destinations in Central America, Mexico, or South America.
6. Approximately 6 percent of the international departures each week are to Europe; while 5 percent are to cities in Canada.
7. With 1,587 weekly international departures, Miami International accounts for almost 70 percent of Florida's weekly international departures.
8. While Ft. Lauderdale has 442 weekly international departures, these flights are almost exclusively to destinations in the Bahamas.
9. Orlando's 125 weekly international departures have a more diversified range of service.

Overview of Current Commercial Air Service

Among all state's, Florida has one of the most comprehensive systems of scheduled commercial service airports. Nineteen airports in the State Airport System currently have scheduled airline service. Until the spring of 2000, scheduled airline service was also provided to Marathon, FL. The carrier providing this service terminated operations earlier this year; at this time, a replacement carrier has not been secured.

The Federal Aviation Administration (FAA) categorizes commercial airports based on the number of annual enplaned passengers they serve. Airports are categorized as follows:

Hub Size	Annual Enplanements
Large Hub	6.5 million and above
Medium Hub	6.5 million to1.6 million
Small Hub	1.6 million to 324,000
Non-Hub	324,000 and below

Based on this definition, four (4) of Florida's 19 commercial airports are classified as Large Hubs. These Large Hubs include the airports serving Miami, Orlando, Tampa, and Ft. Lauderdale. The Florida system contains three (3) Medium Hubs; Medium Hub airports serve West Palm Beach, Jacksonville, and Ft. Myers. The remaining 12 commercial service airports fall into the Small Hub or the Non-Hub category. Small Hubs serve Sarasota, Pensacola, Tallahassee, Ft. Walton Beach, Orlando-Sanford, Key West, Daytona Beach, Melbourne, and St. Petersburg. Non-Hubs serve Panama City, Gainesville, and Naples. Marathon was also most recently classified as a Non-Hub airport.

Comparable Markets

Comparing markets, either by population served or by the number of annual travelers each market enplanes, provides a general reference point for how one community's scheduled commercial airline service may compare to service in another similar community. There are many factors, however, that enter into the level of commercial airline service that any given airport has. Some of these factors include:

- Types of traveler served/whether the majority of the travelers are traveling for business or leisure purposes.
- Locations of alternative travel/whether travelers have other nearby commercial service airports that they may choose for their departures or whether there are other convenient and competing modes of transportation.
- Geographic location of the market/whether the market is rural, suburban, or urban impacts its level commercial airline service, as does the location of the market in comparison to domestic airline route structures.

Scheduled airline service to all of Florida's commercial airports is impacted, to some degree, by each of these factors. Florida markets have a high percentage of leisure travelers; demographics in the State are also characterized by a higher than average percentage of retirees. This translates into Florida being often characterized by the airlines as a "low yield" market; low yields result from the fact that may travelers are flying on deeply discounted fares and in some instances "free" frequent flyer tickets.

Similar to most states, Florida airports face competition from the State's excellent system of interstates and turnpikes. More importantly, airports in Florida often face intense competition from one another. Many of Florida's Small and Non-Hub airports are in close proximity to one or more Large or Medium Hub airports. This competition impacts commercial airline service at several Small and Non-Hub airports in Florida.

Finally, Florida's geographic location at the extreme eastern and southern most tip of the U.S. means that the State is at the end of all domestic airline route structures. A state located in the heartland has many airline route structures that crisscross above, and these states are also located in closer proximity to a greater number of airline connecting hubs. These facts and the fact that Florida airports are a "spoke" location for most airlines, makes it difficult to directly compare scheduled commercial airline service in Florida to airline service in other "similar" markets.

The facts noted above indicate that Florida markets may not always have the same level of commercial airline service as other comparable markets. To compare Florida's scheduled air service to air service in comparable markets, annual enplanements were used to determine which markets should be compared. **Table 25** compares service at Florida airports to commercial air service at other comparable airports. It is important to note that an attempt was not made to compare service levels for Miami and Orlando to other airports; this decision was made because of the extremely unique nature of both of these airports. Service levels for the remaining 17 commercial service airports are shown in Table 25. Markets are compared using July 2000 weekly flights and seats leaving each market, the number of non-stop destinations served from each market, and the number of hubs served from each market that can be used to make airline connections.

As shown in Table 25, markets have been grouped by their total 1999 annual enplaned passengers; commercial airline service to Florida markets compares generally well to the average level of service found in each enplanement category. As mentioned, leisure travel, the number of competing airports, and its geographic location make Florida somewhat unique. It is also important to note that for some of the cities being compared to the Florida markets, service is more prevalent on turboprop aircraft; this can increase the number of destinations and hubs served. Florida markets tend to have a higher percentage of their airline service on major/national jets.

In the 5 to 8 million enplanement category, both Tampa and Ft. Lauderdale compare favorably to the averages for the category. Within this category, Tampa may be most comparable to San Diego and Ft. Lauderdale may be most comparable to San Jose. As can be seen, service to the Florida markets exceeds that available in the most directly comparable market.

In the 1 million to 5 million enplanement category, service at West Palm Beach, Jacksonville, and Ft. Myers compares favorably to the category averages. As shown in Table 25, scheduled airline service for Ft. Myers is slightly below the category average. This market is impacted by the Florida-specific factors noted above; it is also important to note that the Ft. Myers market has made recent strides (not reflected in the data shown in Table 1) in recruiting new carriers serving new markets.

In the 1 million to 500,000 annual enplanement category, both Sarasota and Pensacola are near the category averages. In the 250,000 to 500,000 category, Tallahassee and Ft. Walton Beach are above or near the category averages. The remainder of the Florida airports in this category varies in terms of their levels of service. Service to Orlando-Sanford, Daytona Beach, and Melbourne are all impacted by the

high and unique level of scheduled commercial airline service that is provided to Orlando International, while service to St. Petersburg is impacted by service provided to Tampa International. Both St. Petersburg and Orlando-Sanford each have charter service that is not reflected in the information presented in Table 25. Both Orlando-Sanford and St. Petersburg have somewhat unique scheduled service that cannot be readily compared to service in other markets. Key West, the final airport in this category, meets the category average for the number of destinations served but falls below for the average number of hubs served.

In the remaining categories, 100,000-250,000 enplanments and 50,000-100,000 enplanements, the Florida airports (Panama City, Gainesville, and Naples) have scheduled commercial airline service that is comparable to the category averages. In the final enplanement category, 50,000 or less annual enplanements, Marathon is the only Florida airport in this category. As previously mentioned, Marathon lost its commercial airline service in the spring of 2000. As a result, comparisons in this category are not possible.

While several factors indicate that Florida markets may not be expected to have commercial airline service that is equal to other comparable domestic markets, the data presented in Table 25 shows that Florida airports do in fact, for the most part, have levels of service that are equal to or above the averages for the enplanement categories shown in Table 25.

Average Fares

Nationally, the average one-way fare paid by all domestic air travelers is $148.68. In most Florida market's, the one-way average fare is below the national average. The average one-way fare for all Florida markets is $128.89. Average one-way domestic fares for each of the Florida markets are as follows:

Market	Average One-Way Fare
Ft. Lauderdale	$120.94
Miami	$153.21
W. Palm Beach	$136.54
Key West	$133.17
Marathon	$153.04
Orlando	$118.69
Melbourne	$144.00
Daytona Beach	$145.86
Tampa	$122.80
Sarasota	$130.67
St. Petersburg	$107.35
Jacksonville	$128.75
Tallahassee	$162.50
Gainesville	$171.03
Ft. Myers	$130.02
Naples	$137.01
Pensacola	$166.28
Ft. Walton Beach	$145.85
Panama City	$175.01

As shown in this list, 6 of the 19 Florida airports shown above have average one-way fares that exceed the national average. The highest average one-way fares are experienced at Panama City and Gainesville. Even with average fares at some Florida airports exceeding the national average, average one-way fares in the State are almost $20 below the national average.

Airport Service Areas

As previously mentioned, many of the Florida airports compete with one another because of their geographic proximity. This competition results in a wide variety of air service choices for many Florida residents, visitors, and businesses. Because of advantages that can be gained (fares, schedules, airline choices, aircraft size, non-stop service), it is not uncommon for air travelers to drive two or more hours to begin their trip. Diversion of passengers from one market area to another nearby competing market area has become a national phenomena, resulting from the deregulation of the domestic airline industry.

Maps 1-8 reflect how market areas of Florida's commercial service airports overlap with one another when market areas are assumed to be just 60 or 90 minutes. In reality since many travelers are known to routinely be driving 120 minutes to begin their air travel, even a greater degree of overlap among markets is really occurring. In certain parts of the State, air travelers are within the market areas for three competing airports. This competition limits the ability of airports of some Florida airports to achieve air service improvements. It is this same competition, however, that provides Florida with exceptional air service choices and average one-way airfares that are notably lower than the national average.

There are no standards that define what constitutes "good" commercial airline service. In today's deregulated environment, there are many communities that have either lost service altogether or have seen their service reduced to one airline flying to one hub using turboprop aircraft. Air service to Florida's communities is considered to be good based on the following:

- Average one-way domestic airfares are generally below the national average.
- Air travelers often have several choices for a departure airport that is within 60 to 90 minutes of their point of origination.
- Florida's domestic air service is well matched to passenger destinations.
- Service beyond the State is generally on jet equipment.
- Most Florida markets have service by multiple airlines to two or more connecting hubs.

Opportunities for Air Service Enhancements

Throughout the U.S., many commercial airports are engaged in efforts to improve their commercial airline service. As a group, commercial airports in the Florida system that have experienced decreasing numbers of annual enplanements, fall into the Small and Non-Hub categories. Florida airports in the Small and Non-Hub categories include the facilities that serve:

- Sarasota
- Pensacola
- Tallahassee
- Ft. Walton Beach
- Orlando-Sanford

- Key West
- Daytona Beach
- Melbourne
- St. Petersburg
- Panama City
- Gainesville
- Naples

Enplanement Trends

As shown in **Table 26,** of Florida's airports in the Small and Non-Hub categories several have experienced some decline in their levels of annual enplaned passengers. These airports include Daytona Beach, Gainesville, Melbourne, Naples, and Sarasota-Bradenton; Tallahassee recorded a minimal gain in enplanements between 1988 and 1999.

On the other hand, some of the Florida airports in the Small and Non-Hub categories have experienced average annual rates of growth in their annual enplaned passengers that have actually exceeded the State's average. Enplanements for all commercial airports in the Florida system grew at an average annual rate of 4.0 percent between 1988 and 1999. Small and Non-Hub airports whose enplanements have grown at a rate above the State average include Key West, Orlando-Sanford, Panama City, and St. Petersburg.

Opportunities for improving scheduled commercial air service vary by market. For most of the Florida airports in the Small and Non-Hub categories, their proximity to larger Medium and Large Hub airports impacts their ability to attack new air service and in some cases to even retain existing air service. While many of the Small and Non-Hub airports compete with Large and Medium hub airports, some also compete with each other for enplaning passengers. Florida's Small and Non-Hub airports compete with the following airports:

Small/Non-Hub Airports	Enplanements	Competing Airport(s)
Sarasota	Decreasing	Ft. Myers/Tampa
Pensacola	Increasing	Panama City/Mobile
Tallahassee	Constant	Jacksonville/Orlando/Atlanta
Ft. Walton Beach	Increasing	Pensacola/Tallahassee
Orlando-Sanford	Increasing	Orlando/Daytona Beach
Key West	Increasing	Miami
Daytona Beach	Decreasing	Orlando/Jacksonville
Melbourne	Decreasing	Orlando
St. Petersburg	Increasing	Tampa/Sarasota
Panama City	Increasing	Tallahassee/Ft.Walton Beach
Gainesville	Decreasing	Jacksonville/Orlando
Naples	Decreasing	Ft. Myers/Miami

Small and Non-Hub commercial airports in the Florida system that recorded an increase in their annual enplanements between 1988 and 1999, for the most part, compete with other Small and Non-Hub airports and not the Medium and Large hubs. Orlando-Sanford and St. Petersburg, even though each

does compete with larger hub airports, have both recorded enplanement increases. Despite their proximity to larger competing commercial service airports, these two airports have successfully increased their enplanements by attracting niche carriers and charter operators.

Airline/Market Considerations

With continued airline consolidation and increased focus on directing aircraft to routes that can be operated at the greatest profit, some Florida airports that have experienced declining levels of enplanements could find themselves at risk of facing service reductions. In a deregulated environment, the responsibility for maintaining and improving commercial airline service has fallen to each community.

In today's commercial airline environment, carriers can be divided into four categories: major/national, regional/commuter, low fare, and specialty. What each of these types of carriers seeks, when they evaluate expansion of their route structures, varies. Carriers in all categories, however, have one thing in common; they are seeking routes that will return a profit. Major/National carriers often seek routes characterized by higher percentages of business travelers who traditionally travel on a more frequent basis and are willing to pay higher fares for the convenience of airline travel. Regional/commuter carriers often analyze markets to determine not only the number of passengers they can carry to their "hub" but also the number of passengers that they can connect to their markets beyond the hub.

Low fare, start-up carriers typically begin with a route structure that is geared to serve top destinations from their start up location. For example, when Western Pacific, an initially successful low fare carrier, started operations from their base in Colorado, their initial strategy was to provide service to Denver's top destinations. Carriers such as National, Jet Blue, and Midwest Express are employing similar operating strategies. St. Petersburg and Orlando-Sanford have both had success in attracting specialty carriers. Specialty carriers often seek alternative airports located in proximity to Large Hubs; in addition to location, these carriers are seeking airports that are not hindered by capacity constraints while providing reasonable operating costs.

Operating Subsidies

Since airline deregulation, it has become apparent that smaller markets are at a disadvantage in terms of their ability to compete for commercial airline service. This fact was recognized as soon as the domestic airline industry was deregulated and led to the creation of the Essential Air Service (EAS) Program. This program guarantees service to smaller communities that had commercial airline service prior to deregulation. Many changes to the EAS program have occurred since its inception, but the program continues. There are no Florida airports that are eligible for operating subsidies under the EAS program.

Under Air 21, additional Federal funds may become available to subsidize commercial airline service to small, underserved communities. This program, if funded as part of Air 21, would provide up to $500,000 per year for three years to forty communities. The guidelines for communities that will be eligible to participate in this program have yet to be identified, nor is it even certain that Federal funds will be committed to provide additional operating subsidies for smaller communities. On a national basis, there are many communities that have average fares that are far in excess of the national average. Many smaller communities also have service by one airline to one hub on turboprop aircraft. At this

point, it is difficult to determine if Florida markets will be able to effectively compete for Air 21 small community funds, should they become available.

The concept behind any operating subsidy is to "nurture" an airport's commercial air service so that the service can become financially self-supporting. Even when the EAS Program was conceived in the late 1970's, this program was envisioned to be short-term. It was assumed that if operating subsidies were provided, shortly, demand levels would stabilize, and then increase, and service would become self-supporting. More than 30 years later, communities that were part of the original EAS Program are still receiving operating subsidies. In other EAS communities, the cost of underwriting commercial airline service became so excessive that it exceeded funding limitations included in the Federal legislation that created EAS.

In addition to Federal operating subsidies, many individual communities have provided airline operating subsidies. A variety of local operating subsidies have been attempted. It is important to note that any operating subsidy provided to a carrier may not come directly from an airport; FAA grant assurances strictly prohibit airports from using airport revenues to support airline service. That being said, communities that have subsidized service have done so through local funding, usually provided by the business community.
Airline operating subsidies are intended to be temporary; their intent is to attract service and once that service is attracted ridership will soon be sufficient to support service that is economically self-supporting. In reality, however, subsidies that have been provided have rarely worked this way.

Subsidies have been provided to attract and support several "types" of commercial air service; these subsidy types may be described as follows:

- Jet Operations – In the aftermath of deregulation, communities once served by Major/National jets found themselves with commercial service provided only by turboprop aircraft. Some communities worked out various types of operating subsidies or seat guarantees that supported the continued availability of Major/National jet service. Amarillo, Texas provides an example for this type of subsidy category. For a number of years, the Amarillo community provided operating subsidies to American Airlines to maintain the community's Major/National jet service. Ridership on the larger aircraft did not increase to the level that was needed for American to provide the service without an operating subsidy. Ultimately, regional jet aircraft were used to replace turboprop aircraft in this market. The community found this aircraft to be acceptable and terminated the service subsidy for the larger jet. The airline's decision to replace the market's turboprop aircraft with the regional jet was not influenced by the service subsidy but rather by the airline's fleet modernization plans.

- Seasonal/Resort Service – Communities in Mississippi, Arizona, and Colorado provide good examples of subsidies in this category. The operators of resorts have from time to time found it was to their financial advantage to at least partially underwrite the cost of scheduled airline service to their particular community. In some cases, service has been seasonal while in other more limited cases the service has been year round. In most instances, once commercial service has been secured, it has continued to be subsidized. In Colorado, a few of the resort communities have been successful in maintaining seasonal service without long term subsidies. It is important to note that ridership on this type of

subsidized service is heavily, if not exclusively, weighted toward visitor related travel to and from the market. While residents gain some travel benefits, this service is geared toward bringing visitors to and from the market.

- Low Fare-Start Up Carrier Service – Carriers in this category are often operating on a limited budget and hence have frequently put their service out to bid, so to speak. Prior to its merger with AirTran, ValueJet frequently encouraged communities to compete with one another to offer the carrier their "best" package to bring service to their community. This type of subsidy competition was encouraged between Mobile, Pensacola, Ft. Walton Beach, and Panama City. Before any subsidies were paid, ValueJet ceased to operate and became part of AirTran. While AirTran operates successfully at Ft. Walton Beach, the carrier never received any subsidy to provide this service. On the other hand, AirTran service to Mobile was subsidized and still ultimately failed. Newport News is another example of a community that provided a subsidy to attract AirTran service; while this service continues to be provided, it also continues to be subsidized.

- Air Access - Some smaller communities, particularly in the West, have lost all scheduled commercial airline service. Hence, subsidies just to provide air access have been devised. In October, New Mexico will begin a program that provides $500,000 per year to support air service to three communities. State funds will be matched by local funds. Using a Beech 1900, the carrier will link the three cities and then provide service on to two different hubs, Denver and Dallas. The carrier will not code share with the airlines that hub at these two locations so joint fares to locations beyond the hubs will not be available. The type of air transportation that will be provided through this subsidized program will provide "air access" rather than "air service" as it is typically thought of. This type of operating subsidy is appropriate only when a community has lost all scheduled service.

Nationally, the success rate for locally subsidized commercial air service programs has not been high. The experience of the vast majority of the communities that have offered airline operating subsidies has been that while the subsidy was available, the carrier provided service. Once the subsidy ran out, however, the service was terminated. Cities that have provided operating subsidies have also found that they have often had service that has been both unreliable and untimely in terms of schedules. Less than a handful of examples exist nationally in which subsidies lead to financially self-supporting commercial airline service.

Air 21 Air Service Support

Air 21 contains a new Regional Air Service Incentive Program (RASIP). It is important to note that as of now, funds have not been allocated to fund RASIP. Under this program, Federal credit instruments would be made available to FAA certified carriers that are either new entrants or commuters; these Federal loans would be used to purchase regional jets. It is important to note that RAISP is a loan as opposed to a subsidy program and that carriers participating in this program would be required to repay the loans.

In order to qualify for Federal credit instruments to purchase regional jets, a carrier would need to demonstrate to the DOT/FAA that their regional jet acquisition would improve service. Under RASIP, the carrier would have to provide service to "underserved" markets. Qualifying communities would have access to air service via a Small Hub or a Non-Hub airport; communities would also not be within 40 miles of a Medium or Large Hub. DOT would ultimately determine if a community proposed by a carrier has insufficient service. Guidelines for quantifying sufficient versus insufficient service have yet to be determined.

To qualify for a Federal instrument of credit, the carrier would need to enter into a legally binding agreement to provide service to the "underserved" community for 36 consecutive months. Since communities qualifying for RASIP by definition must be underserved, there is a good possibility that their passenger demand levels may be limited. While RASIP would help the airlines to purchase equipment to serve these cities, demand levels may not be sufficient to make the resultant service financially self-supporting and some type of operating subsidy may be required. Under the Small Community Air Service Program, which is also an unfunded program in Air 21, operating subsidies of up to $500,000 for 3 years may be available. RASIP may need to be combined with the Small Community Program that will provide subsidies. If it is funded, communities that match Federal operating subsidies may be given priority when cities are selected for this program.

DOT will determine whether a carrier is financially capable of repaying their Federal loan. Federal credit instruments may be made available to qualifying carriers for up to 50 percent of the cost of a regional jet. RASIP will be terminated in 2005, but loans that are issued will continue to be administered after that date.

From the carrier's standpoint, participation in RASIP presents a risk because of the carrier's obligation to provide service to smaller communities that may have a history of declining levels of activity and passenger demand. Since RASIP is a loan and not a subsidy program, carriers will need to identify routes that can attract passenger levels that are sufficient for the carrier to generate the revenue that it needs to repay the aircraft loan.

While guidelines for identifying "underserved" communities have not been finalized, the following will most likely be considered for selecting participants for the RAISP program:

- Communities that had commercial air service but that are currently without scheduled air service.
- Communities that have service to only one connecting hub by one carrier
- Communities that have only turboprop service

Most Florida communities would fail to meet these guidelines. Naples and Key West are served exclusively by turboprops, and Marathon did recently loose its scheduled service. Physical limitations of the runways at these airports may preclude them as regional jet airports.

Rules on use of regional jets purchased through the RASIP program are not finalized. It is clear that aircraft acquired through this program would need to be used to provide service to the underserved community for a three year period. It is not clear whether or not the aircraft has to be used exclusively to provide flights to the underserved airport. It may be possible that DOT will allow the carrier to provide flights to the underserved community as well as to provide service to larger, more lucrative markets. Should this be the case, service to the underserved market could suffer should the carrier find it

necessary to cancel flights for mechanical, weather, or other reasons. This has been the experience of EAS versus non-EAS communities served by the same carrier.

RASIP language would make it possible for a community to acquire a RASIP financed aircraft and then in turn lease that aircraft to an airline that would provide service to the community. While this option may appear initially to be attractive, there could be potential drawbacks for a community being the owner of the aircraft; these are as follows:

- The community could be exposed to liability risks.
- The community would benefit most from service from a carrier with code sharing agreements with a larger airline; operating agreements between commuter airlines and their larger code sharing partners may limit their ability to enter into such an arrangement with a community.
- The community could be at risk if the airline operating their aircraft ceased to operate or went bankrupt.
- The community would be obligated to repay the loan for the aircraft purchase; sources of revenue other than those that may be obtained from providing the service would have to be identified to repay the Federal loans.

While there are some "models" for communities that own aircraft and lease them back to a carrier, they are very limited. Further, the track record for this type of service has not been particularly successful.

State Assisted Airline Service

While all states recognize the need for and importance of commercial airline service, most states also recognize that in a deregulated airline environment, air service needs are best addressed on the individual community level. States that have undertaken statewide initiatives related to airline service are generally those that have seen several communities lose air service, and these states have other communities that are at risk of losing service. State programs that address air service most often provide funds to individual airports to promote air service at the local level. In a few more isolated instances, some states have attempted to subsidize air service and a more limited number of states have considered state-run airline service.

While this list is not totally comprehensive, those states that have made funds available to individual airports to assist them with air service marketing and promotion efforts include Iowa, Maine, Michigan, Minnesota, Virginia, and Wyoming. New Mexico's airline service subsidy program, scheduled to go into effect in October 2000, will be the only state funded airline subsidy program. Maryland, however, is reported also considering some type of airline subsidy program. Vermont subsidized service to one of its airport for a three month trial period; ultimately, however, demand was not sufficient to support service that was financially self-sufficient, and the service failed.

The New Mexico program was created by an appropriation of $500, 000 from the State Legislature. The program is designed to provide new or improved air service to small communities in New Mexico. The program is designed specifically to support service to hubs in the southwest. Under the New Mexico program, two or more eligible entities most submit an application to the Aviation Division indicating which entity will be the lead fiscal agent to administer the grant. The maximum grant is $200,000 per entity. Grant recipients must provide a 50% match to receive a grant. Selected entities are responsible for securing their own airline service that must be obtained through a competitive bid process. The New

Mexico program is based on several small communities joint together to obtain at least a minimal level of commercial airline service.

In addition to New Mexico, the State of Maryland has recently allocated funds to subsidize commercial airline service. Funds to provide airline operating subsidies in Maryland have come from the State's General Fund. While service has yet to begin with operating subsidies from the State's program, the Maryland Legislature approved a total of $5 million for a three year period to subsidize commercial airline service to "underserved" communities in Maryland. To date, $1 million of the $5 million has been allocated. It is expected that the remaining $4 million will be approved in increments of $2 million in each of the next two years. Appropriation of funding in each of the next two years is not, however, guaranteed. The State hopes that if service is subsidized for a three year period that at the end of the three years, the service will be financially self-supporting. The goal of the Maryland program is to improve service from underserved communities in Maryland to the State's primary hub airport, Baltimore-Washington International. In its initial year of operation, the program is expected to provide operating subsidies to two or three communities. These communities will share the $1 million that has been allocated to fund the program's first year of operation. The State plans to soon issue requests for proposals from carriers who are interested in providing commercial airline service. Communities participating in the program are not required to match State funds. While only two or three communities are expected to participate in the program during its first year, in the following two years, additional communities could become eligible to participate. Carriers who are interested in providing the subsidized service must operate at least 19-passenger aircraft; all subsidized service will be provided from the underserved communities in Maryland to only Baltimore-Washington International. Communities that fall into the underserved category may or may not have existing commercial airline service. How successful this program will be, remains to be seen. When the State conceived its subsidy program, it estimated that $5 million would be required to support subsidized service to three communities for a one year period. While the Maryland Legislature did fund the program at $5 million, funding is spread over a 3 year period. It is also possible that as many as 11 communities may participate in the subsidy program in the ensuing years, providing funds are allocated to program in the remaining years.

North Dakota, South Dakota, South Carolina, and Maine have all considered, or in the case of North Dakota, South Dakota and South Carolina, subsidized instate air service. While Maine considered a state-run airline to provide instate air service, steps to act on this consideration were not taken. In the case of South Dakota, the state contracted with GP Express to provide linear instate service; the state actually ran the airline. After six months of substantial losses, the service was cancelled. In North Dakota, a state air service program was operated in conjunction with the University of North Dakota, Great Lakes Aviation, and China Air. Working with the Chinese government and the other previously mentioned entities, the state of North Dakota helped to fund a program that trained Chinese pilots in exchange for commercial air service from North Dakota's smaller commercial airports to United's hub in Denver. The program lasted two years and then failed. In the case of both North and South Dakota, service to the subsidized communities was terminated once the subsidies to underwrite the cost of the service ended. As recently as last year, elected officials in North Dakota were calling for a "state run" airline to improve the state's commercial airline service. Estimates show that with start up costs, a minimum of $68 million would be required to support even a minimal level of service for two years.

In 1994, with the help of $16 million from the State of South Carolina and the City of Columbia, Air South started "low fare" service from Columbia. Even though the airline was capitalized through State of South Carolina, much of the service that Air South provided was from and to cities beyond the State. In addition to City and State financing, a terminal renovation costing $40 million was completed at Columbia to support the operation of Air South. This airline operated for three years and then declared bankruptcy. Incumbent carriers in Columbia who were not offered similar financial incentives viewed the treatment of Air South as being unfair. Further, the State of South Carolina may ultimately be forced to pay some of Air South's remaining financial obligations.

Instate air service systems have been analyzed by several states, including Pennsylvania and Georgia. Such systems, however attractive they may initially appear, face many obstacles. While there are many people who travel each day within the boundaries of any given state, providing scheduled commercial airline service to "capture" these travelers is very difficult. Instate service provided by a state run airline faces the following challenges:

- Highway Competition – In any state, as an example, there are any given number of people who each day need to travel from "City A" to "City B." When the traveler from City A arrives in City B, they still need a car to conduct their business. Assuming that the driving time from City A to City B is three hours and the "scheduled" flight time is one hour, it would be very difficult to capture this potential passenger. By the time the traveler drives to their local airport, parks, waits for the plane, makes the flight, arrives in the next city, and rents a car, the traveler can identify some time savings but at a cost (airline fare and rental car) that will most likely not lure them off the highway.
- Schedule Frequency – Most instate travelers require a high degree of flexibility in their travel schedules. In those instances where state-run instate air service has been attempted, serve frequency between cities has been two to three flights per day. This level of frequency is not sufficient to meet the needs of all travelers, and a large number of "potential" patrons for instate air service are lost because service frequency to meet the needs of all travelers is not possible from a cost perspective.
- Existing Competition – Within most states, there are some city pairs that generate demand that is sufficient to support scheduled airline service and there are other city pairs that do not have sufficient demand. For those city pairs that do have sufficient demand, a state-run airline usually will find itself in competition with an incumbent airline. The state-run service faces obstacles such as lack of code sharing with a major carrier, lack of a frequent flyer program, and lack of identification in the national computer reservation systems. Typically, the instate routes that remain unserved or underserved do not have sufficient demand to support service that is financially self-supporting.
- Code Sharing – When instate air service is successfully provided, it is often because the carrier is serving both origination and destination (O&D) passengers as well as connecting passengers. For example, on flights between Naples and Orlando, some passengers are terminating their travel at Orlando while others are using Orlando as a point to connect to other destinations. Service between Naples and Orlando is profitable to the carrier because they are able to serve both O&D and connecting passengers. Since a state-run airline would most not likely have code sharing arrangements with larger Major/National carriers, while they could attract the O&D portion of the demand on any given route, a state-run airline would in all probability not attract the connecting passenger.

- Service Cost – Because smaller aircraft would most likely be used by a state-run airline, many incorrectly assume that such service would be more cost effective because of the smaller aircraft. In reality, the airline cost per seat mile to provide service actually goes up substantially as the number of seats on the aircraft goes down. To fully subsidize three daily round trips on a 30-passenger turboprop aircraft between two cities in Florida could cost in excess of $1 million each year. The cost of providing service combined with marginal demand levels is major reason for the failure of most instate air service.

Commercial airlines actually provide Florida with a fairly substantial network of instate commercial air service. A state-run airline would be in direct competition with private enterprise on city pairs that currently have service. State subsidized service could divert demand from carriers presently providing service, resulting in possible service termination by these carriers and an overall weakening of the State's otherwise healthy air service system.

Florida is fortunate in the level of air service that it currently has within and beyond the State. For example, Pennsylvania, another highly populated State, by comparison has scheduled airline service which is far less than that provided to cities in Florida. While Pennsylvania has service to 16 airports, Florida has scheduled service to 19 airports. Service to one of Pennsylvania's airports is subsidized through the EAS program. All of the Florida airports have service which is financially self-supporting. Of the 16 commercial service airports in Pennsylvania, 9 have only instate service provided by a single airline to either Pittsburgh and/or Philadelphia on turboprop aircraft. Key West and Naples are the only airports among Florida's 19 commercial service airports that have only instate service and each of these airports have service to four or more location by several airlines. Air service in Florida is generally good; a state-run and subsidized airline, even if it were providing only instate service, could weaken existing service and upset the balance of a system that is based on supply and demand.

Locally Based Air Service Initiatives

Air service improvements are best addressed by individual airports and the communities they serve. While there are no "silver bullets" for improving scheduled commercial airline service, there are, according to a report published by the USDOT, some common sense approaches that can be employed to improve each communities chances for optimizing it commercial airline service. These approaches may be summarized as follows:

- Keep abreast of changes in air service that are occurring in your area or region. Be aware of new equipment types that airlines are using at nearby airports, new routes that carriers are serving, and new airlines that initiate service.
- Understand your airport's role and potential. Orlando-Sanford and St. Petersburg offer excellent examples of airports that despite their physical proximity to two of Florida's largest hub airports have a identified a service niche for themselves and have expanded their service and the number of passengers they serve each year.
- Demonstrate to the community the importance of scheduled air service. By measuring the economic value of the airport to the community, it becomes clear that the airport is important to the area's overall economic infrastructure. Understanding the economic significance of commercial airline service to the community is valuable in local efforts to reverse passenger diversion trends.

- Consider all types of carriers. While many communities seek carriers who provide Major/National jet service, the Regional/Commuter segment of the airline industry is the fastest growing. Since frequency and reliability are two important characteristics of good air service, more frequent flights on Regional/Commuter carriers may benefit local air service.
- Be realistic about airport expansion and development plans. The number one objective of each airline is profitability. An airport that can demonstrate lower operating costs for the airlines and adequate operational capacity can often gain an advantage over more expensive competing airports. Projects that increase airline operating costs should be carefully reviewed.
- Be proactive in marketing your airport. It is first necessary to determine your airport's ability to support air service improvements. If you determine that there are legitimate opportunities in your market, the airport should take steps to market service improvements to candidate carriers. While the airline have their own route planners, thoughtful and factually based presentations to the carriers can increase an airport's likelihood for success.
- Form a positive relationship with your existing carriers. Many airports put all of their air service efforts into bringing new carriers to their markets. Many communities even create locally based operating subsidies to lure new carriers. Working with incumbent carriers to sustain and improve existing air service should be an equally, if not more important, goal for any local air service initiatives.

Commercial airline service is an every changing commodity; and communities throughout the State need to be vigilant in taking steps to maintain and improve this service.

Table 1

Summary of Airport Activity
FT. LAUDERDALE/HOLLYWOOD INTERNATIONAL AIRPORT (FLL)

Airports with Nonstop Service	Weekly Departures	Carriers Serving	Airports with Nonstop Service	Weekly Departures	Carriers Serving
Tampa	128	WN (71), 3M (50), DL (7)	Detroit	22	NW (14), NK (8)
Orlando	120	WN (47), DL* (46), 3M (27)	Pittsburgh	22	US
Atlanta	112	DL (70), FL (42)	St. Louis	22	TW (21); WN (1)
New York-Newark	87	CO (52), DL* (21), NK (14)	Hartford	21	DL* (14); US* (7)
Boston	63	DL* (42), US* (21)	Islip	21	DL* (14), NK (7)
New York-LaGuardia	63	DL(21), NK(14), AA(14), US*(14)	Sarasota/Brandenton	20	YI
Philadelphia	56	US (49), FL (7)	Cleveland	14	CO
New York-Kennedy	55	B6 (33), DL* (21), TW (7)	Washington-National	14	US
Dallas/Ft. Worth	49	AA (28), DL (21)	Atlantic City	7	NK
Key West	43	3M (22), 9K (21)	Columbus	7	DL*
Baltimore	42	US* (28), WN (14)	Gulfport	7	FL
Charlotte	42	US	Las Vegas	7	HP
Jacksonville	41	WN	Los Angeles	7	AA
San Juan	41	TW (21), AA (14), TZ (6)	Nashville	7	WN
Raleigh/Durham	33	JI	New Orleans	7	WN
Chicago-O'Hare	30	AA (16), UA (14)	Phoenix	7	HP
Houston-Bush	30	CO	Indianapolis	6	TZ
Cincinnati	28	DL (21), DL* (7)	Tallahassee	6	US*
Washington-Dulles	28	US* (14), DL* (14)	West Palm Beach	2	3M
Chicago-Midway	26	TZ (19), WN (7)	Miami	1	3M
			TOTAL	**1,344**	

Carrier Legend: AA=American; B6=JetBlue; CO=Continental; DL=Delta, DL*=Delta Express & Comair (Orlando and Cincinnati); FL=AirTran; HP=America West; JI=Midway; NK=Spirit; TW=Trans World; TZ=American Trans Air; UA=United; US=US Airways; US*=Metrojet & US Airways Express (Tallahassee only); WN=Southwest; YI=Air Sunshine; 3M=Gulfstream; 9K=Cape Air.

Table 1 (continued)

Summary of Airport Activity
FT. LAUDERDALE/HOLLYWOOD INTERNATIONAL AIRPORT (FLL)

Activity by U.S. Region

U.S. Region	1999 Passenger Originations		July 2000 Weekly Departures	
	Passengers	% of Total	Flights	% of Total
Northeast	2,599,010	43.6%	479	35.6%
Midwest	937,930	15.7%	155	11.5%
Southeast	1,199,760	20.1%	228	17.0%
Southwest	487,980	8.2%	21	1.6%
South Central	350,100	5.9%	79	5.9%
Mid South	249,050	4.2%	21	1.6%
North Central	68,510	1.1%	0	0.0%
Northwest	73,380	1.2%	0	0.0%
Florida Only	573,620 (incl. above)		361	26.9%
TOTAL	**5,965,720**	**100.0%**	**1,344**	**100.0%**

Sources: *Official Airline Guide*, July 2000; DOT, *O&D Survey*, reconciled to Schedules T-100 and 298C T-1.

Table 2

Summary of Airport Activity
MIAMI INTERNATIONAL AIRPORT (MIA)

Airports with Nonstop Service	Weekly Departures	Carriers Serving	Airports with Nonstop Service	Weekly Departures	Carriers Serving
Orlando	212	DL* (42), AA* (42), AA (35), US* (31), UA (7)	Detroit	32	NW (25), AA (7)
			St. Louis	29	TW
Tampa	178	3M (62), US* (53), AA* (42), AA (21)	San Francisco	28	AA (21), UA (7)
			Baltimore	21	US* (14), AA (7)
Key West	135	AA* (55), 3M (46), US* (34)	Cincinnati	21	DL
Atlanta	133	DL (70), AA (35), FL (21), UA (7)	Denver	21	UA (14), AA (7)
Chicago-O'Hare	98	AA (63), UA (35)	Naples	21	AA*
Dallas/Ft. Worth	79	AA	New Orleans	21	AA
Washington-National	77	AA (70), UA (7)	Sarasota/Brandenton	21	AA*
New York-LaGuardia	76	AA (69), UA (14)	Las Vegas	20	N7 (13), HP (7)
Houston-Bush	68	CO (40), AA (28)	Pittsburgh	15	US
New York-Kennedy	63	AA (35), TW (21), DL (7)	Cleveland	14	AA (7), UA (7)
New York-Newark	63	CO (35), UA (28)	Memphis	14	NW
San Juan	63	AA	Minneapolis/St. Paul	14	NW
Ft. Myers	49	AA* (42), 3M (7)	Raleigh/Durham	14	AA
Los Angeles	49	AA (35), UA (14)	St.Thomas	14	AA
Philadelphia	49	US (28), UA (21)	Hartford	7	AA
Washington-Dulles	49	US* (21), UA (21), AA (7)	Nashville	7	AA
Jacksonville	47	AA*	Phoenix	7	HP
Tallahassee	46	DL*(28), AA (18)	Seattle	7	AA
Charlotte	37	US	St. Croix	7	AA
Boston	35	AA	Ft. Lauderdale	2	3M
			TOTAL	**1,963**	

Carrier Legend: AA=American; AA*=American Eagle; CO=Continental; DL=Delta, DL*=Delta Express & Comair (Orlando and Cincinnati); FL=AirTran; HP=America West; NW=Northwest; N7=National; TW=Trans World; UA=United; US=US Airways; US*=Metrojet & US Airways Express (Florida markets only); 3M=Gulfstream.

Table 2 (continued)
Summary of Airport Activity
MIAMI INTERNATIONAL AIRPORT (MIA)

Activity by U.S. Region

U.S. Region	1999 Passenger Originations		July 2000 Weekly Departures	
	Passengers	% of Total	Flights	% of Total
Northeast	1,720,960	35.4%	455	23.2%
Midwest	756,200	15.6%	194	9.9%
Southeast	1,081,330	22.3%	268	13.7%
Southwest	526,310	10.8%	104	5.3%
South Central	392,250	8.1%	168	8.6%
Mid South	178,680	3.7%	42	2.1%
North Central	122,070	2.5%	14	0.7%
Northwest	78,900	1.6%	7	0.4%
Florida Only	348,470 (incl. above)		711	36.2%
TOTAL	**4,856,700**	**100.0%**	**1,963**	**100.0%**

Sources: *Official Airline Guide*, July 2000; DOT, *O&D Survey*, reconciled to Schedules T-100 and 298C T-1.

Table 3
Summary of Airport Activity
PALM BEACH INTERNATIONAL AIRPORT (PBI)

Airports with Nonstop Service	Weekly Departures	Carriers Serving	Airports with Nonstop Service	Weekly Departures	Carriers Serving
Tampa	90	3M (44), US* (39), DL (7)	Pittsburgh	15	US
Atlanta	63	DL	Baltimore	14	US*
Orlando	53	DL* (34), US* (19)	Cincinnati	14	DL
New York-LaGuardia	49	DL (21), TW (14), US* (14)	Detroit	14	NW
New York-Newark	41	CO (34), NK (7)	Washington-National	14	US
Charlotte	35	US	Houston-Bush	13	CO
Boston	31	DL (17), US* (14)	Chicago-O'Hare	7	UA
Dallas/Ft. Worth	28	DL (21), AA (7)	Islip/Long Island	7	NK
Hartford	21	DL* (14), US* (7)	St. Louis	7	TW
Philadelphia	21	US	Atlantic City	7	NK
Raleigh/Durham	21	JI	New York-Kennedy	6	TW
Tallahassee	17	US*	Ft. Lauderdale	1	3M
			TOTAL	**589**	

Activity by U.S. Region

U.S. Region	1999 Passenger Originations		July 2000 Weekly Departures	
	Passengers	% of Total	Flights	% of Total
Northeast	1,539,180	57.1%	226	38.4%
Midwest	421,690	15.6%	42	7.1%
Southeast	290,810	10.8%	119	20.2%
Southwest	177,900	6.6%	0	0.0%
South Central	139,990	5.2%	41	7.0%
Mid South	68,280	2.5%	0	0.0%
North Central	34,010	1.3%	0	0.0%
Northwest	25,740	1.0%	0	0.0%
Florida Only	68,220 (incl. above)		161	27.3%
TOTAL	**2,697,600**	**100.0%**	**589**	**100.0%**

Sources: *Official Airline Guide*, July 2000; DOT, *O&D Survey*, reconciled to Schedules T-100 and 298C T-1.
Carrier Legend: AA=American; DL=Delta, DL*=Delta Express (Hartford) & Comair (Orlando); CO=Continental; FL=AirTran; JI=Midway; NK=Spirit; NW=Northwest; TW=Trans World; UA=United; US=US Airways; US*=Metrojet & US Airways Express (Florida markets only); 3M=Gulfstream.

Table 4

Summary of Airport Activity
KEY WEST INTERNATIONAL AIRPORT (EYW)

Airports with Nonstop Service	Weekly Departures	Carriers Serving
Miami	140	AA* (55), 3M (51), US* (34)
Tampa	73	3M (40), US* (33)
Ft. Lauderdale	42	3M (21), 9K (21)
Orlando	34	DL*
Naples	21	9K
Ft. Myers	15	9K
TOTAL	**325**	

Activity by U.S. Region

U.S. Region	1999 Passenger Originations		July 2000 Weekly Departures	
	Passengers	% of Total	Flights	% of Total
Northeast	87,280	32.6%	0	0.0%
Midwest	35,500	13.3%	0	0.0%
Southeast	111,370	41.6%	0	0.0%
Southwest	8,400	3.1%	0	0.0%
South Central	11,380	4.3%	0	0.0%
Mid South	9,290	3.5%	0	0.0%
North Central	2,700	1.0%	0	0.0%
Northwest	1,810	0.7%	0	0.0%
Florida Only	89,190 (incl. above)		325	100.0%
TOTAL	**267,730**	**100.0%**	**325**	**100.0%**

Sources: *Official Airline Guide*, July 2000; DOT, *O&D Survey*, reconciled to Schedules T-100 and 298C T-1.
Carrier Legend: AA*=American Eagle; DL*=Comair; US*=US Airways Express; 3M=Gulfstream; 9K=Air Sunshine.

Table 5

Summary of Airport Activity
FLORIDA KEYS MARATHON AIRPORT (MTH)

****American Eagle discontinued commercial service at Marathon Airport in Spring 2000.**

Airports with Nonstop Service	Weekly Departures	Carriers Serving
TOTAL	0	

Activity by U.S. Region

U.S. Region	1999 Passenger Originations		July 2000 Weekly Departures	
	Passengers	% of Total	Flights	% of Total
Northeast	8,790	44.3%	0	n.a.
Midwest	3,940	19.9%	0	n.a.
Southeast	4,200	21.2%	0	n.a.
Southwest	910	4.6%	0	n.a.
South Central	1,010	5.1%	0	n.a.
Mid South	610	3.1%	0	n.a.
North Central	260	1.3%	0	n.a.
Northwest	120	0.6%	0	n.a.
				n.a.
Florida Only	2,900 (incl. above)		0	n.a.
				n.a.
TOTAL	**19,840**	**100.0%**	**0**	n.a.

Sources: *Official Airline Guide*, July 2000; DOT, *O&D Survey*, reconciled to Schedules T-100 and 298C T-1.

Table 6 (continued)

Summary of Airport Activity
ORLANDO INTERNATIONAL AIRPORT (MCO)

Activity by U.S. Region

U.S. Region	1999 Passenger Originations		July 2000 Weekly Departures	
	Passengers	% of Total	Flights	% of Total
Northeast	4,157,710	37.8%	866	30.6%
Midwest	2,367,730	21.5%	472	16.7%
Southeast	1,455,430	13.2%	363	12.8%
Southwest	978,970	8.9%	99	3.5%
South Central	883,230	8.0%	170	6.0%
Mid South	565,270	5.1%	176	6.2%
North Central	349,590	3.2%	44	1.6%
Northwest	244,090	2.2%	0	0.0%
Florida Only	382,080 (incl. above)		637	22.6%
TOTAL	**11,002,020**	**100.0%**	**2,827**	**100.0%**

Sources: *Official Airline Guide*, July 2000; DOT, *O&D Survey*, reconciled to Schedules T-100 and 298C T-1.

Table 7

Summary of Airport Activity
MELBOURNE INTERNTIONAL AIRPORT (MLB)

Airports with Nonstop Service	Weekly Departures	Carriers Serving
Atlanta	56	DL (28), DL* (28)
New York-LaGuardia	7	NK
TOTAL	**63**	

Activity by U.S. Region

U.S. Region	1999 Passenger Originations		July 2000 Weekly Departures	
	Passengers	% of Total	Flights	% of Total
Northeast	131,230	50.0%	7	11.1%
Midwest	36,310	13.8%	0	0.0%
Southeast	38,580	14.7%	56	88.9%
Southwest	17,620	6.7%	0	0.0%
South Central	15,950	6.1%	0	0.0%
Mid South	15,180	5.8%	0	0.0%
North Central	3,750	1.4%	0	0.0%
Northwest	3,900	1.5%	0	0.0%
Florida Only	980 (incl. above)		0	0.0%
TOTAL	**262,520**	**100.0%**	**63**	**100.0%**

Sources: *Official Airline Guide*, July 2000; DOT, *O&D Survey*, reconciled to Schedules T-100 and 298C T-1.
Carrier Legend: DL=Delta; DL*=Atlantic Southeast; NK=Spirit.

Table 8

Summary of Airport Activity
DAYTONA BEACH INTERNATIONAL AIRPORT (DAB)

Airports with Nonstop Service	Weekly Departures	Carriers Serving
Atlanta	49	DL (28), DL* (21)
New York-Newark	7	CO
TOTAL	**56**	

Activity by U.S. Region

U.S. Region	1999 Passenger Originations		July 2000 Weekly Departures	
	Passengers	% of Total	Flights	% of Total
Northeast	105,250	41.5%	7	87.5%
Midwest	54,940	21.7%	0	0.0%
Southeast	35,290	13.9%	49	12.5%
Southwest	19,190	7.6%	0	0.0%
South Central	14,910	5.9%	0	0.0%
Mid South	16,260	6.4%	0	0.0%
North Central	3,690	1.5%	0	0.0%
Northwest	4,210	1.7%	0	0.0%
Florida Only	750	(incl. above)	0	0.0%
TOTAL	**253,740**	**100.0%**	**56**	**100.0%**

Sources: *Official Airline Guide*, July 2000; DOT, *O&D Survey*, reconciled to Schedules T-100 and 298C T-1.
Carrier Legend: DL=Delta; DL*=Atlantic Southeast; CO=Continental.

Table 9

Summary of Domestic Scheduled Airport Activity
ORLANDO SANFORD AIRPORT (SFB)

Airports with Nonstop Service	Weekly Departures	Carriers Serving
Pittsburgh	7	PN
Portsmouth	6	PN
Gary	6	PN
TOTAL	**19**	

Activity by U.S. Region

U.S. Region	1999 Passenger Originations*		July 2000 Weekly Departures	
	Passengers	% of Total	Flights	% of Total
Northeast	0	-	13	68.4%
Midwest	0	-	6	31.6%
Southeast	0	-	0	0.0%
Southwest	0	-	0	0.0%
South Central	0	-	0	0.0%
Mid South	0	-	0	0.0%
North Central	0	-	0	0.0%
Northwest	0	-	0	0.0%
Florida Only	0 (incl. above)		0	0.0%
TOTAL	**0**	**-**	**19**	**100.0%**

Sources: *Official Airline Guide*, July 2000; DOT, *O&D Survey*, reconciled to Schedules T-100 and 298C T-1.
Note: *Although Pan American began scheduled service at Sanford in October 1999, the airline did not report to the O&D survey in the 1999 calendar year.
Carrier Legend: PN=Pan American.

Table 10

Summary of Airport Activity
TAMPA INTERNATIONAL AIRPORT (TPA)

Airports with Nonstop Service	Weekly Departures	Carriers Serving	Airports with Nonstop Service	Weekly Departures	Carriers Serving
Miami	176	3M (62), US* (51), AA* (42), AA (21)	Islip/ Long Island	28	WN (14), NK (7), US* (7)
			Nashville	28	WN
Atlanta	135	DL (79), FL (56)	Memphis	21	NW
Ft. Lauderdale	128	WN (73), 3M (48), DL (7)	Panama City	19	US*
West Palm Beach	88	3M (42), US*(39), DL (7)	Naples	18	US*
Key West	77	3M (44), US* (33)	Gainesville	17	3M
Tallahassee	75	US* (48), 3M (27)	Las Vegas	15	DL (7), HP (7), WN (1)
Jacksonville	73	US* (39), 3M (22), WN (12)	Chicago-Midway	14	WN
Baltimore	69	US* (42), WN (27)	Cleveland	14	CO
Dallas/Ft. Worth	63	AA (42), DL (21)	Denver	14	UA
Philadelphia	63	US (56), FL (7)	Los Angeles	14	DL
New York-Newark	54	CO (40), DL* (14)	Minneapolis/St. Paul	14	NW
Boston	49	US* (28), DL* (21)	Orlando	14	DL*
Charlotte	49	US	Providence	14	WN
Chicago-O'Hare	49	UA (28), AA (21)	Washington-National	14	US
Detroit	47	NW (35), NK (12)	Birmingham	13	WN
New Orleans	43	WN	Albuquerque	7	WN
New York-LaGuardia	42	US* (28), AA (14)	Austin	7	WN
Raleigh/Durham	42	JI (28), WN (14)	Gulfport	7	FL
St. Louis	42	TW (35), WN (7)	Indianapolis	7	WN
Houston-Bush	39	CO	Kansas City	7	WN
Pittsburgh	35	US	Louisville	7	WN
Washington-Dulles	35	UA (21), US* (14)	Phoenix	7	HP
New York-Kennedy	34	B6 (20), DL (7), TW (7)	San Antonio	7	WN
Ft. Myers	33	3M	San Juan	7	AA
Pensacola	32	US*	Atlantic City	7	NK
Cincinnati	28	DL	Ft. Walton Beach	6	US*
Columbus	28	WN (14), DL* (14)	**TOTAL**	**1,975**	

Carrier Legend: AA=American; AA*=American Eagle; B6=JetBlue; CO=Continental; DL=Delta, DL*=Delta Express & Comair (Orlando only); FL=AirTran; HP=America West; JI=Midway; NK=Spirit; NW=Northwest; TW=Trans World;; UA=United; US=US Airways; US*=Metrojet & US Airways Express (Florida markets only); WN=Southwest; 3M=Gulfstream.

Table 10 (continued)

Summary of Airport Activity
TAMPA INTERNATIONAL AIRPORT (TPA).

Activity by U.S. Region

U.S. Region	1999 Passenger Originations		July 2000 Weekly Departures	
	Passengers	% of Total	Flights	% of Total
Northeast	2,138,630	32.8%	444	22.5%
Midwest	1,383,320	21.2%	243	12.3%
Southeast	1,267,700	19.4%	233	11.8%
Southwest	569,690	8.7%	36	1.8%
South Central	526,860	8.1%	137	6.9%
Mid South	387,360	5.9%	112	5.7%
North Central	144,940	2.2%	14	0.7%
Northwest	105,810	1.6%	0	0.0%
Florida Only	563,350 (incl. above)		756	38.3%
TOTAL	**6,524,310**	**100.0%**	**1,975**	**100.0%**

Sources: *Official Airline Guide*, July 2000; DOT, *O&D Survey*, reconciled to Schedules T-100 and 298C T-1.

Table 11

Summary of Domestic Scheduled Airport Activity
SARASOTA/BRADENTON INTERNATIONAL AIRPORT (SRQ)

Airports with Nonstop Service	Weekly Departures	Carriers Serving
Atlanta	49	DL (42), DL*(7)
Orlando	23	DL*
Charlotte	21	US
Miami	21	AA*
Ft. Lauderdale	20	YI
Cincinnati	7	DL
Houston-Bush	7	CO*
New York-Newark	7	CO
St. Louis	7	TW
Chicago-Midway	5	TZ
Indianapolis	4	TZ
TOTAL	**171**	

Activity by U.S. Region

U.S. Region	1999 Passenger Originations		July 2000 Weekly Departures	
	Passengers	% of Total	Flights	% of Total
Northeast	243,700	35.8%	7	4.1%
Midwest	257,670	37.8%	23	13.5%
Southeast	72,270	10.6%	70	40.9%
Southwest	37,490	5.5%	0	0.0%
South Central	24,490	3.6%	7	4.1%
Mid South	21,840	3.2%	0	0.0%
North Central	16,640	2.4%	0	0.0%
Northwest	7,300	1.1%	0	0.0%
Florida Only	16,940 (incl. above)		64	37.4%
TOTAL	**681,400**	**100.0%**	**171**	**100.0%**

Sources: *Official Airline Guide*, July 2000; DOT, *O&D Survey*, reconciled to Schedules T-100 and 298C T-1.
Carrier Legend: AA*=American Eagle; CO=Continental; CO*=Continental Express; DL=Delta; DL*=Comair (Orlando), Atlantic Southeast (Atlanta); US=US Airways; TW=Trans World; TZ=American Trans Air; YI=Air Sunshine.

Table 12

Summary of Domestic Scheduled Airport Activity
ST. PETERSBURG-CLEARWATER INTERNATIONAL AIRPORT (PIE)

Airports with Nonstop Service	Weekly Departures	Carriers Serving
Chicago-Midway	14	TZ
Indianapolis	7	TZ
TOTAL	**21**	

Activity by U.S. Region

U.S. Region	1999 Passenger Originations		July 2000 Weekly Departures	
	Passengers	% of Total	Flights	% of Total
Northeast	100	0.1%	0	0.0%
Midwest	173,230	93.4%	21	100.0%
Southeast	1,030	0.6%	0	0.0%
Southwest	3,840	2.1%	0	0.0%
South Central	4,310	2.3%	0	0.0%
Mid South	10	0.0%	0	0.0%
North Central	2,930	1.6%	0	0.0%
Northwest	0	0.0%	0	0.0%
Florida Only	0 (incl. above)		0	0.0%
TOTAL	**185,450**	**100.0%**	**21**	**100.0%**

Sources: *Official Airline Guide*, July 2000; DOT, *O&D Survey*, reconciled to Schedules T-100 and 298C T-1.
Carrier Legend: TZ=American Trans Air.

Table 13

Summary of Airport Activity
JACKSONVILLE INTERNATIONAL AIRPORT (JAX)

Airports with Nonstop Service	Weekly Departures	Carriers Serving	Airports with Nonstop Service	Weekly Departures	Carriers Serving
Atlanta	105	DL (70), FL (28), DL* (7)	Philadelphia	21	US
Tampa	73	US* (37), 3M (22), WN (14)	St. Louis	21	TW
Charlotte	49	US (42), US* (7)	New York-Newark	20	CO
Miami	47	AA*	Tallahassee	19	US*
Dallas/Ft. Worth	42	AA (21), DL (21)	Chicago-O'Hare	14	UA
Baltimore	41	US* (21), WN (20)	Memphis	14	NW
Ft. Lauderdale	39	WN	Washington-National	13	US
New York-LaGuardia	28	US* (14), DL* (14)	Orlando	8	US*
Raleigh/Durham	28	JI	Birmingham	7	WN
Washington-Dulles	22	UA*	Cleveland	7	CO*
Cincinnati	21	DL (14), DL* (7)	Hilton Head	7	US*
Detroit	21	NW	Indianapolis	7	WN
Houston-Bush	21	CO	New Orleans	7	WN
Nashville	21	WN	**TOTAL**	**723**	

Activity by U.S. Region

U.S. Region	1999 Passenger Originations		July 2000 Weekly Departures	
	Passengers	% of Total	Flights	% of Total
Northeast	640,320	27.9%	145	20.1%
Midwest	393,360	17.1%	91	12.6%
Southeast	573,890	25.0%	189	26.1%
Southwest	208,650	9.1%	0	0.0%
South Central	220,880	9.6%	63	8.7%
Mid South	178,680	7.8%	49	6.8%
North Central	51,950	2.3%	0	0.0%
Northwest	30,810	1.3%	0	0.0%
Florida Only	233,560 (incl. above)		186	25.7%
TOTAL	**2,298,540**	**100.0%**	**723**	**100.0%**

Sources: Official Airline Guide, July 2000; DOT, O&D Survey, reconciled to Schedules T-100 and 298C T-1.
Carrier Legend: AA=American; AA*=American Eagle; DL=Delta, DL*=Delta Express; CO=Continental; CO*=Continental Express; FL=AirTran; JI=Midway; NK=Spirit; NW=Northwest; TW=Trans World; TZ=American Trans Air UA=United; US=US Airways; US*=US Airways Express/Metrojet; WN=Southwest; 3M=Gulfstream.

Table 14

Summary of Domestic Scheduled Airport Activity
TALLAHASSEE REGIONAL AIRPORT (TLH)

Airports with Nonstop Service	Weekly Departures	Carriers Serving
Tampa	75	US* (48), 3M (27)
Orlando	66	DL* (38), US* (28)
Atlanta	56	DL (42), DL*(14)
Miami	46	DL* (28), US* (18)
Charlotte	31	US*
Jacksonville	19	US*
Pensacola	19	US*
West Palm Beach	17	US*
Ft. Lauderdale	6	US*
TOTAL	**335**	

Activity by U.S. Region

U.S. Region	1999 Passenger Originations		July 2000 Weekly Departures	
	Passengers	% of Total	Flights	% of Total
Northeast	73,490	17.6%	0	0.0%
Midwest	42,570	10.2%	0	0.0%
Southeast	228,080	54.6%	87	26.0%
Southwest	21,760	5.2%	0	0.0%
South Central	23,710	5.7%	0	0.0%
Mid South	15,240	3.6%	0	0.0%
North Central	8,150	1.9%	0	0.0%
Northwest	4,950	1.2%	0	0.0%
Florida Only	178,210 (incl. above)		248	74.0%
TOTAL	**417,950**	**100.0%**	**335**	**100.0%**

Sources: *Official Airline Guide*, July 2000; DOT, *O&D Survey*, reconciled to Schedules T-100 and 298C T-1.
Carrier Legend: DL=Delta; DL*=Comair (Orlando), Atlantic Southeast (Atlanta); US*=US Airways Express;3M=Gulfstream.

Table 15

Summary of Airport Activity
GAINESVILLE REGIONAL AIRPORT (GNV)

Airports with Nonstop Service	Weekly Departures	Carriers Serving
Atlanta	56	DL*
Charlotte	20	US*
Tampa	17	3M
TOTAL	**93**	

Activity by U.S. Region

U.S. Region	1999 Passenger Originations		July 2000 Weekly Departures	
	Passengers	% of Total	Flights	% of Total
Northeast	40,820	28.6%	0	0.0%
Midwest	26,250	18.4%	0	0.0%
Southeast	37,670	26.4%	76	81.7%
Southwest	10,620	7.5%	0	0.0%
South Central	9,990	7.0%	0	0.0%
Mid South	10,700	7.5%	0	0.0%
North Central	4,080	2.9%	0	0.0%
Northwest	2,380	1.7%	0	0.0%
Florida Only	8,950 (incl. above)		17	18.3%
TOTAL	**142,510**	**100.0%**	**93**	**100.0%**

Sources: *Official Airline Guide*, July 2000; DOT, *O&D Survey*, reconciled to Schedules T-100 and 298C T-1.
Carrier Legend: DL*=Atlantic Southeast; US*=US Airways Express; 3M=Gulfstream.

Table 16

Summary of Airport Activity
SOUTHWEST FLORIDA REGIONAL AIRPORT (RSW)

Airports with Nonstop Service	Weekly Departures	Carriers Serving	Airports with Nonstop Service	Weekly Departures	Carriers Serving
Atlanta	70	DL (56), FL (14)	Boston	14	DL*
Miami	49	AA* (42), 3M (7)	Pittsburgh	14	US
Charlotte	35	US	Atlantic City	7	NK
Orlando	34	OH	Chicago-Midway	7	TZ
Tampa	33	3M	Chicago-O'Hare	7	UA
Philadelphia	22	US	Cleveland	7	CO
Cincinnati	21	DL	Columbus	7	DL*
Detroit	21	NW (14), NK (7)	Houston-Bush	7	CO
Key West, FL	15	9K	Indianapolis	7	TZ
Newark	15	CO	Islip-Long Island, NY	7	NK
St. Louis	15	TW	New York-LaGuardia	7	US
			TOTAL	**421**	

Activity by U.S. Region

U.S. Region	1999 Passenger Originations		July 2000 Weekly Departures	
	Passengers	% of Total	Flights	% of Total
Northeast	807,840	37.3%	86	20.4%
Midwest	813,320	37.6%	92	21.9%
Southeast	195,220	9.0%	105	24.9%
Southwest	83,030	3.8%	0	0.0%
South Central	93,080	4.3%	7	1.7%
Mid South	58,310	2.7%	0	0.0%
North Central	94,230	4.4%	0	0.0%
Northwest	18,800	0.9%	0	0.0%
Florida Only	33,040 (incl. above)		131	31.1%
TOTAL	**2,163,830**	**100.0%**	**421**	**100.0%**

Sources: *Official Airline* Guide, July 2000; DOT, *O&D Survey*, reconciled to Schedules T-100 and 298C T-1.
Carrier Legend: AA*=American Eagle; DL=Delta, DL*=Delta Express (Comair serves Orlando only); CO=Continental; FL=AirTran; NK=Spirit; TW=Trans World; TZ=American Trans Air UA=United; US=US Airways; 3M=Gulfstream; 9K=Cape Air.

Table 17

Summary of Airport Activity
NAPLES MUNICIPAL AIRPORT (APF)

Airports with Nonstop Service	Weekly Departures	Carriers Serving
Tampa	25	US*
Miami	21	AA*
Key West	21	9K
Orlando	6	US*
TOTAL	**73**	

Activity by U.S. Region

U.S. Region	1999 Passenger Originations		July 2000 Weekly Departures	
	Passengers	% of Total	Flights	% of Total
Northeast	21,330	43.2%	0	0.0%
Midwest	5,110	10.3%	0	0.0%
Southeast	14,010	28.3%	0	0.0%
Southwest	3,360	6.8%	0	0.0%
South Central	3,260	6.6%	0	0.0%
Mid South	1,780	3.6%	0	0.0%
North Central	240	0.5%	0	0.0%
Northwest	340	0.7%	0	0.0%
Florida Only	11,920 (incl. above)		73	100.0%
TOTAL	**49,430**	**100.0%**	**73**	**100.0%**

Sources: *Official Airline Guide*, July 2000; *DOT, O&D Survey*, reconciled to Schedules T-100 and 298C T-1.
Carrier Legend: AA*=American Eagle; US*=US Airways Express; 9K=Air Sunshine.

Table 18

Summary of Airport Activity
PENSACOLA REGIONAL AIRPORT (PNS)

Airports with Nonstop Service	Weekly Departures	Carriers Serving
Atlanta	49	DL
Memphis	35	NW*
Orlando	33	DL*
Tampa	32	US*
Houston-Bush	29	CO* (15), CO (14)
Charlotte	28	US
New Orleans	26	US* (19), DL (7)
Tallahassee	19	US*
Baton Rouge	7	DL
Jackson	7	US*
TOTAL	**265**	

Activity by U.S. Region

U.S. Region	1999 Passenger Originations		July 2000 Weekly Departures	
	Passengers	% of Total	Flights	% of Total
Northeast	109,560	22.4%	0	0.0%
Midwest	79,240	16.2%	0	0.0%
Southeast	143,430	29.4%	77	29.1%
Southwest	51,930	10.6%	0	0.0%
South Central	56,880	11.6%	29	10.9%
Mid South	21,060	4.3%	75	28.3%
North Central	12,850	2.6%	0	0.0%
Northwest	13,720	2.8%	0	0.0%
Florida Only	73,470 (incl. above)		84	31.7%
TOTAL	**488,670**	**100.0%**	**265**	**100.0%**

Sources: *Official Airline Guide*, July 2000; DOT, *O&D Survey*, reconciled to Schedules T-100 and 298C T-1.
Carrier Legend: CO=Continental; CO*=Continental Express; DL=Delta; DL*=Comair; NW*=Express Airlines; US=US Airways; US*=US Airways Express.

Table 19

Summary of Airport Activity
FT. WALTON BEACH (VPS)

Airports with Nonstop Service	Weekly Departures	Carriers Serving
Atlanta	104	DL* (76), FL (28)
Memphis	28	NW
Orlando	18	US*
Panama City	19	US*
Tampa	12	US*
TOTAL	**181**	

Activity by U.S. Region

U.S. Region	1999 Passenger Originations		July 2000 Weekly Departures	
	Passengers	% of Total	Flights	% of Total
Northeast	72,540	21.6%	0	0.0%
Midwest	67,470	20.1%	0	0.0%
Southeast	96,370	28.7%	104	57.5%
Southwest	22,950	6.8%	0	0.0%
South Central	34,480	10.3%	0	0.0%
Mid South	28,780	8.6%	28	15.5%
North Central	9,120	2.7%	0	0.0%
Northwest	4,560	1.4%	0	0.0%
Florida Only	23,400 (incl. above)		49	27.1%
TOTAL	**336,270**	**100.0%**	**181**	**100.0%**

Sources: *Official Airline Guide*, July 2000; DOT, *O&D Survey*, reconciled to Schedules T-100 and 298C T-1.
Carrier Legend: DL*=Atlantic Southeast; FL=AirTran; US*=US Airways Express.

Table 20

Summary of Airport Activity
PANAMA CITY-BAY COUNTY INTERNATIONAL AIRPORT (PFN)

Airports with Nonstop Service	Weekly Departures	Carriers Serving
Atlanta	62	DL*
Ft. Walton Beach	30	US*
Memphis	28	NW*
Orlando	13	US*
Tampa	6	US*
TOTAL	**139**	

Activity by U.S. Region

U.S. Region	1999 Passenger Originations		July 2000 Weekly Departures	
	Passengers	% of Total	Flights	% of Total
Northeast	39,170	26.0%	0	0.0%
Midwest	35,940	23.9%	0	0.0%
Southeast	31,370	20.8%	62	44.6%
Southwest	13,940	9.3%	0	0.0%
South Central	14,050	9.3%	0	0.0%
Mid South	7,750	5.1%	28	20.1%
North Central	4,840	3.2%	0	0.0%
Northwest	3,490	2.3%	0	0.0%
Florida Only	10,980 (incl. above)		49	35.3%
TOTAL	**150,550**	**100.0%**	**139**	**100.0%**

Sources: *Official Airline Guide*, July 2000; DOT, *O&D Survey*, reconciled to Schedules T-100 and 298C T-1.
Carrier Legend: DL*=Atlantic Southeast; NW*=Express Airlines; US*=US Airways Express.

Table 21

Nonstop Service Summary

DOMESTIC SCHEDULED PASSENGER SERVICE AT FLORIDA AIRPORTS

(for the second week of July 2000; sorted by weekly scheduled seats)

Florida Origin Airport	Equipment Type	No.of Destin. Served	Weekly Scheduled Departures	Weekly Scheduled Seats	Avg. Seats per Flight
ALL FLORIDA AIRPORTS		**78**	**11,583**	**1,241,030**	**107**
	Turboprop	21	3,464	107,202	31
	RJ	16	508	25,400	50
	Jet	68	7,611	1,108,428	146
SOUTHEAST FLORIDA					
Ft. Lauderale		**40**	**1,344**	**167,385**	**125**
	Turboprop	7	174	3,399	20
	RJ	3	33	1,650	50
	Jet	35	1,137	162,336	143
Miami		**42**	**1,963**	**237,593**	**121**
	Turboprop	9	599	22,442	37
	RJ	2	49	2,450	50
	Jet	35	1,315	212,701	162
W. Palm Beach		**24**	**589**	**63,635**	**108**
	Turboprop	4	154	4,002	26
	RJ	1	21	1,050	50
	Jet	20	414	58,583	142
Key West		**6**	**325**	**8,258**	**25**
	Turboprop	6	325	8,258	25
WEST CENTRAL FLORIDA					
Orlando		**69**	**2,827**	**343,778**	**122**
	Turboprop	15	492	14,609	30
	RJ	10	123	6,150	50
	Jet	57	2,212	323,019	146
Melbourne		**2**	**63**	**6,307**	**100**
	RJ	1	28	1,400	50
	Jet	2	35	4,907	140
Daytona Beach		**2**	**56**	**5,754**	**103**
	RJ	1	21	1,050	50
	Jet	2	35	4,704	134
Orlando-Sanford		**3**	**19**	**3,287**	**173**
	Jet	3	19	3,287	173
EAST CENTRAL FLORIDA					
Tampa		**54**	**1,975**	**204,432**	**104**
	Turboprop	13	636	17,134	27
	Jet	47	1,339	187,298	140
Sarasota		**11**	**171**	**16,369**	**96**
	Turboprop	3	57	1,746	31
	RJ	3	21	1,050	50
	Jet	7	93	13,573	146
St. Petersburg		**2**	**21**	**3,633**	**173**
	Jet	2	21	3,633	173

Table 21

Nonstop Service Summary

Florida Origin Airport	Equipment Type	No.of Destin. Served	Weekly Scheduled Departures	Weekly Scheduled Seats	Avg. Seats per Flight
NORTHEAST FLORIDA					
Jacksonville		**27**	**723**	**75,860**	**105**
	Turboprop	6	147	5,488	37
	RJ	6	85	4,250	50
	Jet	20	491	66,122	135
Tallahassee		**9**	**335**	**15,357**	**46**
	Turboprop	8	244	7,335	30
	RJ	3	49	2,450	50
	Jet	1	42	5,572	133
Gainesville		**3**	**93**	**4,163**	**45**
	Turboprop	3	58	2,413	42
	RJ	1	35	1,750	50
SOUTHWEST FLORIDA					
Ft. Myers		**22**	**421**	**45,988**	**109**
	Turboprop	4	122	3,941	32
	RJ	1	9	450	50
	Jet	18	290	41,597	143
Naples		**4**	**73**	**1,744**	**24**
	Turboprop	4	73	1,744	24
NORTHWEST FLORIDA					
Pensacola		**10**	**265**	**20,129**	**76**
	Turboprop	5	138	4,051	29
	RJ	1	15	750	50
	Jet	6	112	15,328	137
Ft. Walton Beach		**5**	**181**	**11,523**	**64**
	Turboprop	4	113	5,155	46
	RJ	1	12	600	50
	Jet	2	56	5,768	103
Panama City		**5**	**139**	**5,835**	**42**
	Turboprop	5	132	5,485	42
	RJ	1	7	350	50

SOURCE: *Official Airline Guide.*

Table 22

COMPARISON OF DOMESTIC SCHEDULED PASSENGER SERVICE AT FLORIDA AIRPORTS

(for the second week of February and July 2000)

FL REGION Florida Origin Airport	February 2000 Weekly Scheduled Departures	 Seats	July 2000 Weekly Scheduled Departures	 Seats	Percent Change February to July Departures	 Seats
ALL FLORIDA AIRPORTS	**12,122**	**1,325,811**	**11,583**	**1,241,030**	**4.4%**	**6.4%**
SOUTHEAST FLORIDA	**4,546**	**516,902**	**4,221**	**476,871**	**7.1%**	**7.7%**
Ft. Lauderale	1,306	166,911	1,344	167,385	-2.9%	-0.3%
Miami	2,172	257,829	1,963	237,593	9.6%	7.8%
W. Palm Beach	674	81,840	589	63,635	12.6%	22.2%
Key West	373	9,608	325	8,258	12.9%	14.1%
Marathon	21	714	0	0	100.0%	100.0%
WEST CENTRAL FLORIDA	**2,909**	**359,972**	**2,965**	**359,126**	**-1.9%**	**0.2%**
Orlando	2,764	343,323	2,827	343,778	-2.3%	-0.1%
Melbourne	69	7,508	63	6,307	8.7%	16.0%
Daytona Beach	63	6,892	56	5,754	11.1%	16.5%
Orlando-Sanford	13	2,249	19	3,287	-46.2%	-46.2%
EAST CENTRAL FLORIDA	**2,293**	**248,193**	**2,167**	**224,434**	**5.5%**	**9.6%**
Tampa	2,037	219,457	1,975	204,432	3.0%	6.8%
Sarasota	228	23,729	171	16,369	25.0%	31.0%
St. Petersburg	28	5,007	21	3,633	25.0%	27.4%
NORTHEAST FLORIDA	**1,143**	**92,421**	**1,151**	**95,380**	**-0.7%**	**-3.2%**
Jacksonville	699	72,137	723	75,860	-3.4%	-5.2%
Tallahassee	343	15,752	335	15,357	2.3%	2.5%
Gainesville	101	4,532	93	4,163	7.9%	8.1%
SOUTHWEST FLORIDA	**669**	**72,231**	**494**	**47,732**	**26.2%**	**33.9%**
Ft. Myers	573	70,098	421	45,988	26.5%	34.4%
Naples	96	2,133	73	1,744	24.0%	18.2%
NORTHWEST FLORIDA	**562**	**36,092**	**585**	**37,487**	**-4.1%**	**-3.9%**
Pensacola	263	21,191	265	20,129	-0.8%	5.0%
Ft. Walton Beach	167	9,617	181	11,523	-8.4%	-19.8%
Panama City	132	5,284	139	5,835	-5.3%	-10.4%

SOURCE: *Official Airline Guide.*

Table 23

FLORIDA INTERSTATE SERVICE MATRIX
WEEKLY SCHEDULED FLIGHT DEPARTURES
(July 2000)

Florida Origin	Ft. Lauderdale	Miami	West Palm Beach	Key West	Orlando	Tampa	Ft. Myers	Sarasota/Brandenton	Jacksonville	Tallahassee	Gainesville	Naples	Pensacola	Ft. Walton Beach	Panama City	Florida Total
Southeast																
Ft. Lauderdale	-	1	2	43	120	128	-	20	41	6	-	-	-	-	-	**361**
Miami	2	-	-	135	212	178	49	21	47	46	-	21	-	-	-	**711**
W. Palm Beach	1	-	-	-	53	90	-	-	-	17	-	-	-	-	-	**161**
Key West	42	140	-	-	34	73	15	-	-	-	-	21	-	-	-	**325**
West Central																
Orlando	125	212	53	34	-	14	34	23	6	66	-	13	33	13	11	**637**
East Central																
Tampa	128	176	88	77	14	-	33	-	73	75	17	18	32	6	19	**756**
Sarasota	20	21	-	-	23	-	-	-	-	-	-	-	-	-	-	**64**
Northeast																
Jacksonville	37	49	-	-	8	73	-	-	-	19	-	-	-	-	-	**186**
Tallahassee	6	46	17	-	66	75	-	-	19	-	-	-	19	-	-	**248**
Gainesville	-	-	-	-	-	17	-	-	-	-	-	-	-	-	-	**17**
Southwest																
Ft. Myers	-	49	-	15	34	33	-	-	-	-	-	-	-	-	-	**131**
Naples	-	21	-	21	6	25	-	-	-	-	-	-	-	-	-	**73**
Northwest																**-**
Pensacola	-	-	-	-	33	32	-	-	-	19	-	-	-	-	-	**84**
Ft. Walton Beach	-	-	-	-	18	12	-	-	-	-	-	-	-	-	19	**49**
Panama City	-	-	-	-	13	6	-	-	-	-	-	-	-	30	-	**49**
TOTAL	**361**	**713**	**160**	**325**	**634**	**756**	**131**	**64**	**186**	**248**	**17**	**73**	**84**	**49**	**49**	**3,852**

Source: *Official Airline Guide.*

Notes: Florida Keys Marathon Airport lost commercial service in Spring 2000.

Melbourne, Daytona Beach, Sanford, and St. Petersburg Airports do not offer instate commercial air service.

Table 23 (continued)

FLORIDA INTERSTATE MATRIX, BY EQUIPMENT TYPE
WEEKLY SCHEDULED FLIGHT DEPARTURES
(July 2000)
J=JET; R=REGIONAL JET; T=TURBORPROP

Florida Origin	Ft. Lauderdale	Miami	West Palm Beach	Key West	Orlando	Tampa	Sarasota/Brandenton	Jacksonville	Tallahassee	Gainesville	Ft. Myers	Naples	Pensacola	Ft. Walton Beach	Panama City	Florida Total
Southeast																
Ft. Lauderdale	-	1-T	2-T	43-T	47-J 21-R 52-T	78-J 50-T	20-T	41-J	6-T	-	-	-	-	-	-	**166-J** **21-R** **174-T**
Miami	2-T	-	-	135-T	42-J 21-R 149-T	21-J 157-T	21-T	47-T	28-R 18-T	-	49-T	21-T	-	-	-	**63-J** **49-R** **599-T**
W. Palm Beach	1-T	-	-	-	53-T	7-J 83-T	-	-	17-T	-	-	-	-	-	-	**7-J** **154-T**
Key West	42-T	140-T	-	-	34-T	73-T	-	-	-	-	15-T	21-T	-	-	-	**325-T**
West Central																
Orlando	47-J 21-R 57-T	49-J 21-R 142-T	53-T	34-T	-	14-T	7-R 16-T	6-T	7-R 59-T	-	9-R 25 T	13-T	33-T	13-T	11-T	**96-J** **65-R** **476-T**
East Central																
Tampa	80-J 48-T	21-J 155-T	7-J 81 T	77-T	14-T	-	-	12-J 61-T	75-T	17-T	33-T	18-T	32-T	6-T	19-T	**120-J** **636-T**
Sarasota	20-T	21-T	-	-	7-R 16-T	-	-	-	-	-	-	-	-	-	-	**7-R** **57-T**
Northeast																
Jacksonville	39-J	47-T	-	-	8-T	14-J 59-T	-	-	19-T	-	-	-	-	-	-	**53-J** **133-T**
Tallahassee	6-T	28-R 18-T	17-T	-	7-R 59-T	75-T	-	19-T	-	-	-	-	19-T	-	-	**35-R** **213-T**
Gainesville	-	-	-	-	-	17-T	-	-	-	-	-	-	-	-	-	**17-T**
Southwest																
Ft. Myers	-	49-T	-	15-T	9-R 25-J	33-T	-	-	-	-	-	-	-	-	-	**9-R** **122-T**
Naples	-	21-T	-	21-T	6-T	25-T	-	-	-	-	-	-	-	-	-	**73-T**
Northwest																
Pensacola	-	-	-	-	33-T	32-T	-	-	19-T	-	-	-	-	-	-	**84-T**
Ft. Walton Beach	-	-	-	-	18-T	12-T	-	-	-	-	-	-	-	-	19-T	**49-T**
Panama City	-	-	-	-	13-T	6-T	-	-	-	-	-	-	-	30-T	-	**49-T**
TOTAL	**166-J** **21-R** **176-T** **363**	**70-J** **49-R** **594-T** **713**	**7-J** **153-T** **160**	**325-T** **325**	**89-J** **65-R** **480-T** **634**	**120-J** **636-T** **756**	**7-R** **57-T** **64**	**53-J** **133-T** **186**	**35-R** **213-T** **248**	**17-T** **17**	**9-R** **122-T** **131**	**73-T** **73**	**84-T** **84**	**49-T** **49**	**49-T** **49**	**505-J** **186-R** **3.161-T** **3,852**

Source: *Official Airline Guide.*

Notes: Florida Keys Marathon Airport lost commercial service in Spring 2000.

Melbourne, Daytona Beach, Sanford, and St. Petersburg Airports do not offer instate commercial air service.

Table 24

WEEKLY SCHEDULED INTERNATIONAL FLIGHT DEPARTURES AT ALL FLORIDA AIRPORTS

(July 2000)

FLORIDA ORIGIN World Area Destination Airport	Code	Weekly Departures
FT. LAUDERDALE TOTAL		**442**
Caribbean		**430**
Nassau, Bahamas	NAS	138
Freeport, Bahamas	FPO	79
Marsh Harbour, Bahamas	MHH	58
Treasure Cay, Bahamas	TCB	51
Paradise Island, Bahamas	PID	36
N. Eleuthera, Bahamas	ELH	24
Aruba	AUA	7
Kingston, Jamaica	Kin	7
Montego Bay, Jamaica	MBJ	7
Georgetown, Bahamas	GGT	6
Walker's Cay, Bahamas	WKR	6
Great Harbour, Bahamas	GHC	3
Governors Harbour, Bahamas	GHB	2
Inagua, Bahamas	IGA	2
The Bight, Bahamas	TBI	2
San Salvador, Bahamas	ZSA	2
Europe		**1**
Frankfurt	FRA	1
Canada		**11**
Toronto	YYZ	6
Montreal-Mirabel	YMX	4
Montreal-Dorval	YUL	1

FLORIDA ORIGIN World Area Destination Airport	Code	Weekly Departures
ORLANDO TOTAL		**125**
Caribbean		**53**
Nassau, Bahamas	NAS	35
Treasure Cay, Bahamas	TCB	7
Aruba	AUA	7
Kingston, Jamaica	KIN	4
Mexico/Central America		**14**
San Jose, Costa Rica	SJO	4
Panama City, Panama	PTY	4
Cancun, Mexico	CUN	3
Mexico City, Mexico	MEX	3
South America		**6**
Sao Paulo, Brazil	GRU	4
Caracas, Venezuela	CCS	2
Europe		**32**
London-Gatwick	LGW	21
Manchester, UK	MAN	6
Amsterdam, Netherlands	AMS	4
Dusseldorf, Germany	DUS	1
Canada		**20**
Toronto	YYZ	16
Montreal-Mirabel	YMX	3
Montreal-Dorval	YUL	1

WEST PALM BEACH TOTAL		**57**
Caribbean		**57**
Freeport, Bahamas	FPO	20
Marsh Harbour, Bahamas	MHH	20
Nassau, Bahamas	NAS	17

TAMPA TOTAL		**24**
Caribbean		**13**
Montego Bay, Jamaica	MBJ	7
Grand Cayman Island	GCM	6
Europe		**4**
London-Gatwick	LGW	3
Frankfurt	FRA	1
Canada		**7**
Toronto	YYZ	7

ST. PETERSBURG TOTAL		**9**
Canada		**9**
Toronto	YYZ	9

FT. MYERS TOTAL		**4**
Europe		**4**
Dusseldorf, Germany	DUS	2
Frankfurt, Germany	FRA	2

Table 24

FLORIDA ORIGIN World Area Destination Airport	Code	Weekly Departures
MIAMI TOTAL	**1,587**	
Caribbean		**707**
Nassau, Bahamas	NAS	277
Freeport, Bahamas	FPO	77
Grand Cayman Island	GCM	42
Santo Domigo, Dom. Rep.	SDQ	36
Kingston, Jamaica	KIN	34
Port of Spain, Trinidad	POS	29
Marsh Harbour, Bahamas	MHH	28
Montego Bay, Jamaica	MBJ	28
Port Au Prince, Haiti	PAP	23
Aruba	AUA	21
Curacao, Neth. Antilles	CUR	19
Barbados	BGI	14
Providenciales, Turks	PLS	14
Great Harbour, Bahamas	GHB	10
Eleuthera, Bahamas	ELH	7
Treasure Cay, Bahamas	TCB	7
Antigua, West Indies	ANU	7
Puerto Plata, Dom. Republic	POP	7
Casa De Campo, Dom. Rep.	LRM	7
St. Maarten, Neth. Antilles	SXM	7
Georgetown, Bahamas	GGT	4
Punta Cana, Dom. Republic	PUJ	4
San Salvador, Bahamas	ZSA	3
Bonaire, Neth. Antilles	BON	2
Mexico/Central America		**337**
Cancun, Mexico	CUN	56
Mexico City, Mexico	MEX	56
Panama City, Panama	PTY	46
San Jose, Costa Rica	SJO	45
Guatemala City, Guatemala	GUA	38
San Salvador, El Salvador	SAL	27
Managua, Nicaragua	MGA	24
San Pedro Sula, Honduras	SAP	23
Belize City, Belize	BZE	7
Tegucigalpa, Honduras	TGU	7
Merida, Mexico	MID	7
Roatan, Honduras	RTB	1
South America		**368**
Caracas, Venezuela	CCS	69
Sao Paulo, Brazil	GRU	49
Bogota, Columbia	BOG	40
Santiago, Chile	SCL	32
Buenos Aires, Arentina	EZE	30
Quito, Ecuador	UIO	21
Lima, Peru	LIM	21
Rio de Jainero, Brazil	GIG	20
La Paz, Bolivia	LPB	14
Barraquilla, Columbia	BAQ	14
Guayquil, Ecuador	GYE	14
Cali, Columbia	CLO	7
Cartagena, Columbia	CTG	7
Medellin, Columbia	MDE	7
Maracaibo, Venezuela	MAR	7
Valencia, Venezuela	VLN	5
Santa Cruz, Bolivia	VVI	4
Manaus, Brazil	MAO	2
Porlamar, Venezuela	PMV	2
Cochabamba, Bolivia	CBB	1
Belem, Brazil	BEL	1
Recife, Brazil	REC	1
Europe		**106**
Madrid, Spain	MAD	24
Paris-DeGaulle, France	CDG	18
London-Gatwick	LGW	14
London-Heathrow	LHR	14
Frankfurt, Germany	FRA	7
Amsterdam, Netherlands	AMS	7
Munich, Germany	MUC	5
Zurich, Switzerland	ZRH	5
Milan, Italy	MXP	3
Istanbul, Turkey	IST	3
Brussels, Belgium	BRU	2
Dusseldorf, Germany	DUS	2
Rome, Italy	FCO	2
Canada		**69**
Toronto	YYZ	49
Montreal	YUL	20

MIAMI PUBLIC SPB TOTAL		**25**
Caribbean		**25**
Bimini, Bahamas	NSB	18
Paradise Island, Bahamas	PID	7

FLORIDA TOTAL	**2,273**
Caribbean	**1,285**
Central America/Mexico	**351**
South America	**374**
Europe	**147**
Canada	**116**

Source: *Official Airline Guide.*

Table 25

DOMESTIC SCHEDULED COMMERCIAL SERVICE COMPARISON
FLORIDA AIRPORTS AND OTHER SELECTED U.S. AIRPORTS

		1999 T-3 Total Enplanements[1]	July 2000 Domestic Nonstop Service			
			Weekly Departing		No. of	No. of Connecting
			Flights	Seats	Dest. Served	Hubs Served[2]
>10 million enplanements						
Miami	**MIA**	**15,053,848**	**1,963**	**237,593**	**42**	**28**
Orlando	**MCO**	**12,960,931**	**2,827**	**343,778**	**69**	**30**
5.0 - 8.0 million annual enplanements						
San Diego	SAN	7,563,920	1,752	215,480	35	27
Tampa	**TPA**	**7,358,011**	**1,975**	**204,432**	**54**	**28**
Portland	PDX	6,747,938	2,203	209,154	43	18
Ft. Lauderdale	**FLL**	**6,570,816**	**1,344**	**167,385**	**40**	**24**
Kansas City	MCI	5,702,676	1,888	202,183	55	29
San Jose	SJC	5,587,396	1,386	188,939	27	18
Selected Airports Average			**1,758**	**197,929**	**42**	**24**
1.0 - 5.0 million annual enplanements						
San Antonio	SAT	3,423,126	787	103,998	25	20
Reno	RNO	2,906,537	585	74,387	17	13
West Palm Beach	**PBI**	**2,846,970**	**589**	**63,635**	**24**	**17**
Providence	PVD	2,540,401	890	75,651	26	19
Jacksonville	**JAX**	**2,440,175**	**723**	**75,860**	**27**	**19**
Ft. Myers	**RSW**	**2,347,442**	**421**	**45,988**	**22**	**14**
Omaha	OMA	1,835,722	578	60,220	20	18
Birmingham	BHM	1,524,915	521	56,354	28	18
Selected Airports Average			**637**	**69,512**	**24**	**17**
500,000- 1.0 million annual enplanements						
Savannah	SAV	758,021	309	28,085	11	10
Sarasota	**SRQ**	**739,761**	**171**	**16,369**	**11**	**8**
Harrisburg	MDT	706,775	395	25,157	13	11
Madison	MSN	671,195	332	21,787	11	9
Jackson	JAN	670,030	295	29,181	16	9
Palm Springs	PSP	642,016	215	9,939	5	5
Pensacola	**PNS**	**544,565**	**265**	**20,129**	**10**	**5**
Lexington	LEX	522,568	265	18,251	8	8
Selected Airports Average			**281**	**21,112**	**11**	**8**
250,000-500,000 annual enplanements						
South Bend	SBN	484,720	309	14,513	7	7
Tallahassee	**TLH**	**454,011**	**335**	**15,357**	**9**	**4**
Shreveport	SHV	375,249	268	16,205	8	5
Eugene	EUG	359,346	253	13,233	5	5
Ft. Walton Beach	**VPS**	**350,784**	**181**	**11,523**	**5**	**3**
Orlando-Sanford	**SFB**	**349,443**	**19**	**3,287**	**3**	**1**
NW Arkasas Regional	XNA	320,225	298	13,935	7	6
Kalamazoo	AZO	278,031	217	9,831	6	6
Key West	**EYW**	**275,719**	**325**	**8,258**	**6**	**2**

		1999 T-3 Total Enplanements[/1]	July 2000 Domestic Nonstop Service			
			Weekly Departing		No. of	No. of Connecting
			Flights	Seats	Dest. Served	Hubs Served[/2]
Daytona Beach	**DAB**	**274,431**	**56**	**5,754**	**2**	**2**
Melbourne	**MLB**	**273,813**	**63**	**6,307**	**2**	**1**
Monterey	MRY	257,803	250	8,160	3	3
St. Petersburg	**PIE**	**256,265**	**21**	**3,633**	**2**	**0**
Selected Airports Average			**200**	**10,000**	**5**	**3**
100,000-250,000 annual enplanements						
Augusta, GA	AGS	215,463	106	6,725	2	2
Bangor, ME	BGR	205,344	213	9,024	7	4
Lafayette, LA	LFT	189,253	177	6,510	4	3
Charlottesville, VA	CHO	169,971	186	6,123	6	5
Panama City	**PFN**	**161,861**	**139**	**5,835**	**5**	**3**
Gainesville	**GNV**	**151,763**	**93**	**4,163**	**3**	**2**
Bismarck, ND	BIS	129,083	69	3,946	3	2
Selected Airports Average			**140**	**6,047**	**4**	**3**
50,000-100,000 annual enplanements						
Killeen, TX	ILE	90,383	110	3,524	3	2
Lynchburg, VA	LYH	82,365	131	3,404	4	4
Springfield, IL	SPI	79,757	113	2,840	3	2
Lake Charles, LA	LCH	76,132	73	2,566	2	2
Dothan, AL	DHN	66,009	76	2,832	3	2
Florence, SC	FLO	57,121	78	2,697	2	2
Naples	**APF**	**54,402**	**73**	**1,744**	**4**	**2**
Selected Airports Average			**93**	**2,801**	**3**	**2**
< 50,000 annual enplanements						
Albany, GA	ABY	43,830	47	1,550	1	1
Santa Fe, NM	SAF	25,687	80	1,520	1	1
Worcester, MA	ORH	24,446	63	2,450	3	3
Hickory, NC	HKY	21,483	36	684	1	1
Marathon	**MTH**	**20,155**	**0**	**0**	**0**	**0**
Manhattan, KS	MHK	17,721	44	836	2	1
Altoona, PA	AOO	16,727	38	1,292	3	1
Selected Airports Average			**44**	**1,190**	**2**	**1**

Sources: DOT, Schedule T-3; *Official Airline Guide.*

Notes: [/1] Due to availability of the data, these enplanement figures do not include passengers enplaned on Canadian-flag carriers.

[/2] For this analysis, a hub airport has been defined as an airport with at least 15 percent of its domestic enplanements making a domestic connection at the airport.

Table 26

TOTAL ENPLANED PASSENGERS
AT FLORIDA AIRPORTS, BY REGION
(for the year ended December 31)

	1988	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999[1]	AAG 1988-99
Southeast Florida	**19,213,448**	**18,463,392**	**19,616,424**	**19,511,508**	**19,209,520**	**20,613,361**	**22,510,530**	**23,367,148**	**25,415,938**	**26,653,941**	**25,563,273**	**27,066,940**	**3.2%**
Ft. Lauderdale	4,337,560	4,307,100	4,426,430	4,008,600	4,038,592	4,268,363	5,074,130	4,679,592	5,642,370	6,427,268	6,046,536	6,994,254	4.4%
Miami	12,198,778	11,450,075	12,190,972	12,759,093	12,429,403	13,673,907	14,437,381	15,722,329	16,541,061	16,983,098	16,316,123	16,893,889	3.0%
W. Palm Beach	2,498,532	2,525,195	2,786,973	2,529,640	2,519,833	2,435,893	2,721,921	2,687,516	2,916,037	2,938,031	2,901,612	2,879,246	1.3%
Key West	163,862	169,561	189,889	194,780	201,763	208,485	248,252	242,476	276,856	268,816	271,837	276,829	4.9%
Marathon	14,716	11,461	22,160	19,395	19,929	26,713	28,846	35,235	39,614	36,728	27,165	22,722	4.0%
West Central Florida	**8,825,209**	**9,110,266**	**9,564,141**	**9,499,764**	**10,559,549**	**11,035,551**	**11,189,711**	**11,259,744**	**12,757,854**	**14,121,481**	**14,240,998**	**15,563,160**	**5.3%**
Orlando	8,072,822	8,390,709	8,683,491	8,712,084	9,758,004	10,280,218	10,453,014	10,584,116	11,860,090	13,077,471	13,128,323	14,537,818	5.5%
Melbourne	311,816	299,200	373,588	339,271	355,885	322,012	322,708	301,736	316,600	306,163	250,878	270,671	-1.3%
Daytona Beach	440,571	420,357	507,060	448,409	444,797	407,785	407,502	365,659	387,600	402,322	308,505	284,123	-3.9%
Orlando-Sanford	0	0	2	0	863	25,536	6,487	8,233	193,564	335,525	553,292	470,548	n.a.
East Central Florida	**5,587,694**	**5,502,996**	**6,481,065**	**6,026,088**	**5,895,798**	**6,026,304**	**7,125,134**	**6,908,016**	**7,563,687**	**7,822,509**	**7,957,216**	**8,719,046**	**4.1%**
Tampa	4,666,646	4,585,362	5,303,700	4,937,446	4,825,939	4,859,951	5,926,142	5,675,105	6,266,145	6,584,743	6,751,979	7,566,832	4.5%
Sarasota	870,840	815,423	1,025,965	954,157	889,353	875,864	862,662	783,290	792,032	820,574	775,557	759,311	-1.2%
St. Petersburg	50,208	102,211	151,400	134,485	180,506	290,489	336,330	449,621	505,510	417,192	429,680	392,903	20.6%
Northeast Florida	**2,001,702**	**1,927,258**	**2,026,035**	**1,887,117**	**1,948,095**	**1,939,450**	**2,566,995**	**2,534,000**	**2,472,936**	**2,683,343**	**2,864,131**	**3,094,335**	**4.0%**
Jacksonville	1,352,650	1,313,529	1,355,394	1,283,668	1,317,327	1,324,950	1,886,666	1,816,518	1,826,619	2,036,849	2,252,287	2,475,030	5.6%
Tallahassee	450,409	438,645	454,178	427,243	432,253	430,091	488,381	537,663	476,515	466,741	465,454	465,728	0.3%
Gainesville	198,643	175,084	216,463	176,206	198,515	184,409	191,948	179,819	169,802	179,753	146,390	153,577	-2.3%
Southwest Florida	**1,553,976**	**1,602,444**	**1,840,950**	**1,756,431**	**1,730,077**	**1,826,114**	**2,006,217**	**2,073,453**	**2,189,115**	**2,244,269**	**2,306,860**	**2,529,118**	**4.5%**
Ft. Myers	1,491,601	1,547,626	1,780,766	1,696,072	1,680,259	1,765,797	1,938,706	1,989,677	2,104,260	2,179,338	2,252,107	2,470,114	4.7%
Naples	62,375	54,818	60,184	60,359	49,818	60,317	67,511	83,776	84,855	64,931	54,753	59,004	-0.5%
Northwest Florida	**644,536**	**630,466**	**689,442**	**687,742**	**778,557**	**763,440**	**876,764**	**902,735**	**884,923**	**973,620**	**996,805**	**1,086,899**	**4.9%**
Pensacola	401,097	395,054	433,766	436,815	467,342	431,149	537,856	563,788	541,729	564,901	573,483	545,887	2.8%
Ft. Walton Beach	142,638	152,505	162,426	156,274	179,315	178,750	184,075	189,312	195,738	252,771	265,813	364,071	8.9%
Panama City	100,801	82,907	93,250	94,653	131,900	153,541	154,833	149,635	147,456	155,948	157,509	176,941	5.2%
Total	**37,826,565**	**37,236,822**	**40,218,057**	**39,368,650**	**40,121,596**	**42,204,220**	**46,275,351**	**47,045,096**	**51,284,453**	**54,499,163**	**53,929,283**	**58,059,498**	**4.0%**

SOURCE: FAA-APO, Terminal Area Forecasts, December 1999

NOTES: [1] 1999 enplanements from individual airport records.

n.a.= not applicable

Exhibit 1
Commission on Aviation / Aerospace
Current Travel Patterns & Fares
Southeast Florida

Domestic Outbound O&D Passenger Regional Trends
From Southeast Florida Airports to U.S. Regions
(year ended December 31, 1999)

Southeast FL Airport (Origin)	US Region (Destination)								
	Northeast	Midwest	Southeast	Southwest	South Central	Mid South	North Central	Northwest	**Grand Total**
Outbound O&D Passengers									
Ft. Lauderdale	2,599,010	937,930	1,199,760	487,980	350,100	249,050	68,510	73,380	**5,965,720**
Miami	1,720,960	756,200	1,081,330	526,310	392,250	178,680	122,070	78,900	**4,856,700**
W. Palm Beach	1,539,180	421,690	290,810	177,900	139,990	68,280	34,010	25,740	**2,697,600**
Key West	87,280	35,500	111,370	8,400	11,380	9,290	2,700	1,810	**267,730**
Marathon	8,790	3,940	4,200	910	1,010	610	260	120	**19,840**
Southeast FL Total	**5,955,220**	**2,155,260**	**2,687,470**	**1,201,500**	**894,730**	**505,910**	**227,550**	**179,950**	**13,807,590**
U.S Region Passenger Market Share									
Ft. Lauderdale	43.6%	15.7%	20.1%	8.2%	5.9%	4.2%	1.1%	1.2%	**100.0%**
Miami	35.4%	15.6%	22.3%	10.8%	8.1%	3.7%	2.5%	1.6%	**100.0%**
W. Palm Beach	57.1%	15.6%	10.8%	6.6%	5.2%	2.5%	1.3%	1.0%	**100.0%**
Key West	32.6%	13.3%	41.6%	3.1%	4.3%	3.5%	1.0%	0.7%	**100.0%**
Marathon	44.3%	19.9%	21.2%	4.6%	5.1%	3.1%	1.3%	0.6%	**100.0%**
Southeast FL Total	**43.1%**	**15.6%**	**19.5%**	**8.7%**	**6.5%**	**3.7%**	**1.6%**	**1.3%**	**100.0%**
Average Domestic One-Way Fares									
Ft. Lauderdale	$112.31	$130.80	$92.16	$171.21	$160.68	$123.43	$186.13	$177.46	**$120.94**
Miami	$139.89	$147.28	$124.11	$229.57	$179.33	$150.49	$188.37	$211.72	**$153.21**
W. Palm Beach	$124.35	$135.20	$133.25	$192.58	$172.19	$159.05	$188.51	$215.49	**$136.54**
Key West	$143.51	$152.42	$99.92	$248.36	$189.44	$147.19	$203.94	$237.35	**$133.17**
Marathon	$151.82	$164.77	$110.44	$284.12	$160.74	$132.49	$216.35	$256.25	**$153.04**
Southeast FL Total	**$123.91**	**$137.86**	**$109.81**	**$200.56**	**$171.02**	**$138.24**	**$187.93**	**$198.58**	**$135.62**

SOURCE: DOT O&D Survey, reconciled to Schedules T-100 and 298C T-1.

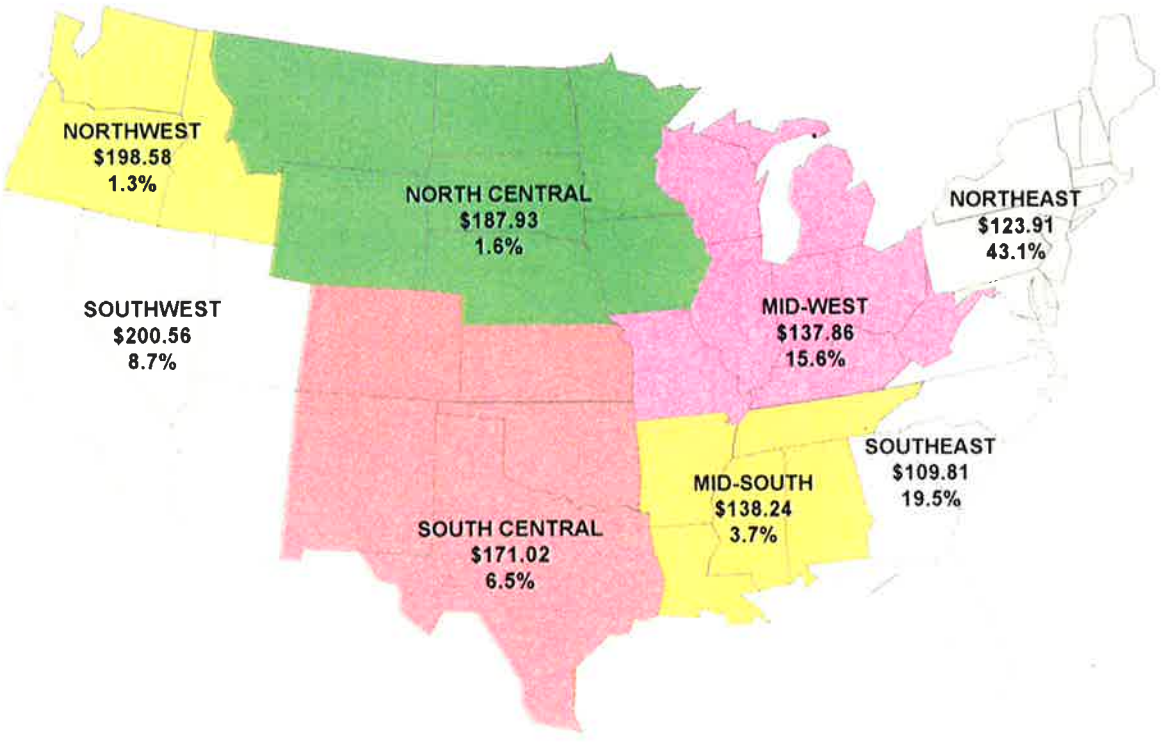
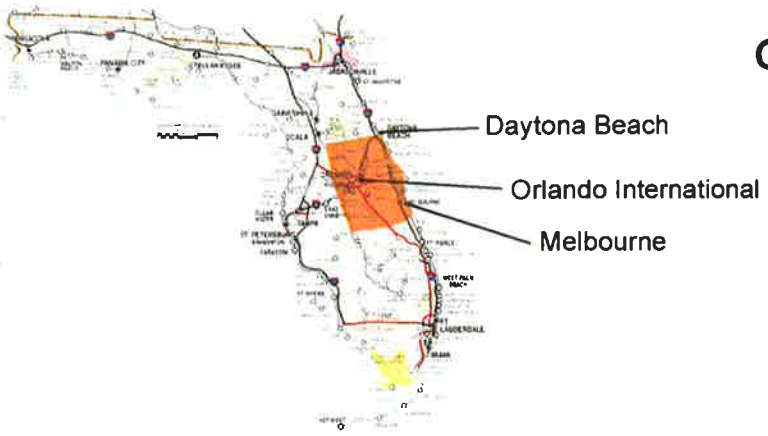


Exhibit 2
Commission on Aviation / Aerospace
Current Travel Patterns & Fares
West Central Florida



Domestic Outbound O&D Passenger Regional Trends
From West Central Florida Airports to U.S. Regions
(year ended December 31, 1999)

West Central FL	US Region (Destination)								
Airport (Origin)	Northeast	Midwest	Southeast	Southwest	South Central	Mid South	North Central	Northwest	**Grand Total**
Outbound O&D Passengers									
Orlando	4,157,710	2,367,730	1,455,430	978,970	883,230	565,270	349,590	244,090	**11,002,020**
Melbourne	131,230	36,310	38,580	17,620	15,950	15,180	3,750	3,900	**262,520**
Daytona Beach	105,250	54,940	35,290	19,190	14,910	16,260	3,690	4,210	**253,740**
West Central FL Total	**4,394,190**	**2,458,980**	**1,529,300**	**1,015,780**	**914,090**	**596,710**	**357,030**	**252,200**	11,518,280
U.S Region Passenger Market Share									
Orlando	37.8%	21.5%	13.2%	8.9%	8.0%	5.1%	3.2%	2.2%	**100.0%**
Melbourne	50.0%	13.8%	14.7%	6.7%	6.1%	5.8%	1.4%	1.5%	**100.0%**
Daytona Beach	41.5%	21.7%	13.9%	7.6%	5.9%	6.4%	1.5%	1.7%	**100.0%**
West Central FL Total	**38.1%**	**21.3%**	**13.3%**	**8.8%**	**7.9%**	**5.2%**	**3.1%**	**2.2%**	**100.0%**
Average Domestic One-Way Fares									
Orlando	$104.36	$113.38	$110.89	$173.93	$145.92	$102.20	$141.60	$146.31	**$118.69**
Melbourne	$115.84	$140.69	$142.74	$262.39	$222.06	$141.87	$200.41	$234.64	**$144.00**
Daytona Beach	$129.23	$135.57	$151.56	$204.82	$182.56	$143.45	$192.71	$190.72	**$145.42**
West Central FL Total	**$105.30**	**$114.28**	**$112.63**	**$176.05**	**$147.85**	**$104.33**	**$142.75**	**$148.42**	**$119.86**

SOURCE: DOT O&D Survey, reconciled to Schedules T-100 and 298C T-1.

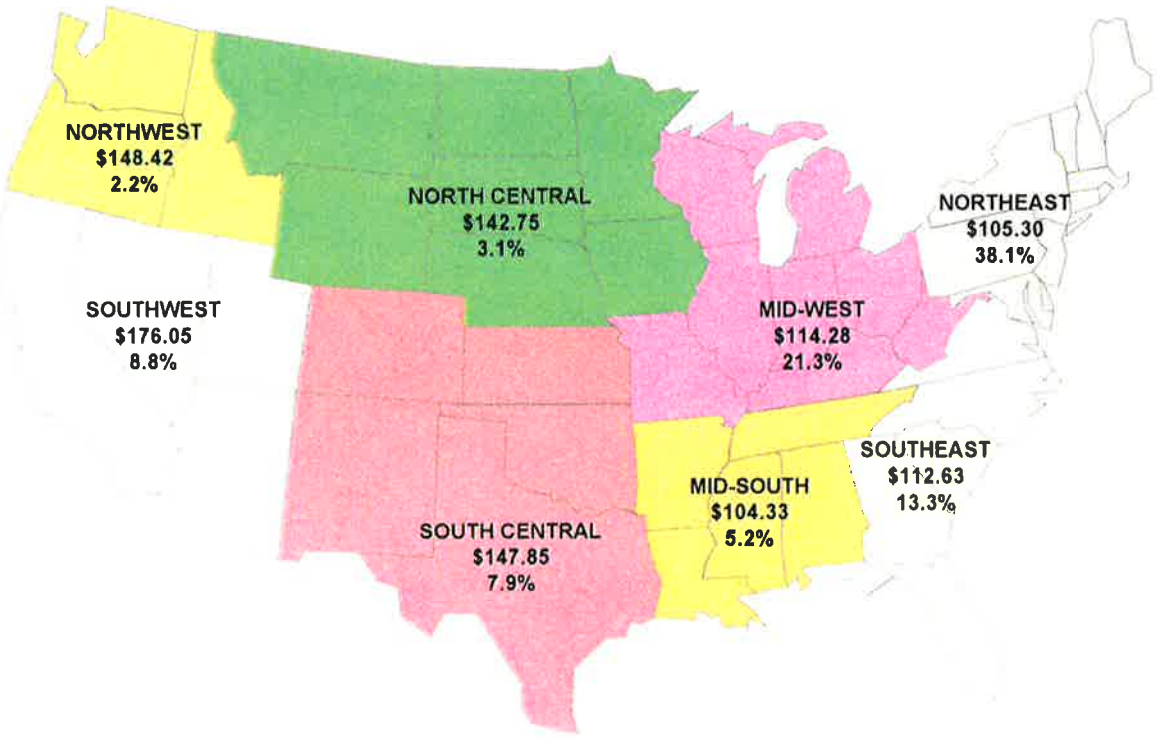
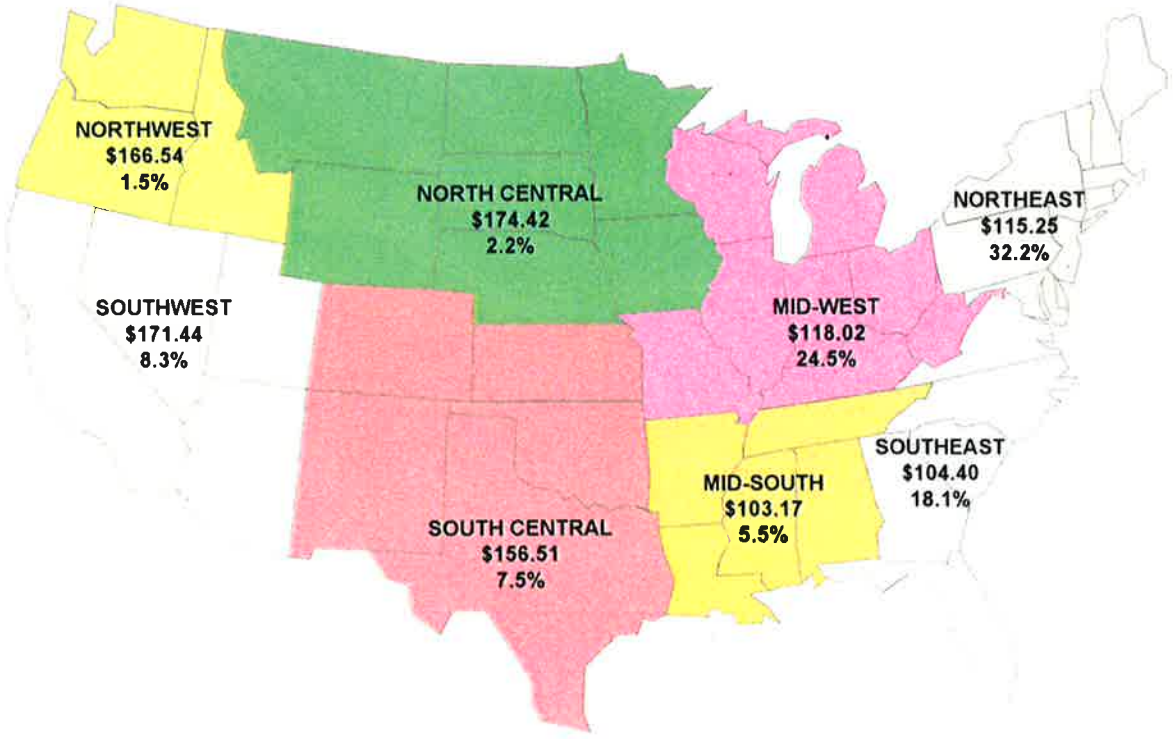


Exhibit 3
Commission on Aviation / Aerospace
Current Travel Patterns & Fares
East Central Florida

Domestic Outbound O&D Passenger Regional Trends
From East Central Florida Airports to U.S. Regions
(year ended December 31, 1999)

East Central FL	US Region (Destination)								
Airport (Origin)	Northeast	Midwest	Southeast	Southwest	South Central	Mid South	North Central	Northwest	**Grand Total**
Outbound O&D Passengers									
Tampa	2,138,630	1,383,320	1,267,700	569,690	526,860	387,360	144,940	105,810	6,524,310
Sarasota	243,700	257,670	72,270	37,490	24,490	21,840	16,640	7,300	681,400
St. Petersburg	100	173,230	1,030	3,840	4,310	10	2,930	0	185,450
East Central FL Total	**2,382,430**	**1,814,220**	**1,341,000**	**611,020**	**555,660**	**409,210**	**164,510**	**113,110**	**7,391,160**
U.S Region Passenger Market Share									
Tampa	32.8%	21.2%	19.4%	8.7%	8.1%	5.9%	2.2%	1.6%	100.0%
Sarasota	35.8%	37.8%	10.6%	5.5%	3.6%	3.2%	2.4%	1.1%	100.0%
St. Petersburg	0.1%	93.4%	0.6%	2.1%	2.3%	0.0%	1.6%	0.0%	100.0%
East Central FL Total	**32.2%**	**24.5%**	**18.1%**	**8.3%**	**7.5%**	**5.5%**	**2.2%**	**1.5%**	**100.0%**
Average Domestic One-Way Fares									
Tampa	$114.21	$119.66	$102.30	$170.04	$156.23	$102.00	$177.07	$164.14	$122.80
Sarasota	$124.29	$119.24	$140.39	$191.91	$157.93	$123.66	$159.14	$201.21	$130.67
St. Petersburg	$236.80	$103.10	$155.60	$179.58	$182.26	$750.00	$130.10	n.a.	$107.35
East Central FL Total	**$115.25**	**$118.02**	**$104.40**	**$171.44**	**$156.51**	**$103.17**	**$174.42**	**$166.54**	**$123.14**

SOURCE: DOT O&D Survey, reconciled to Schedules T-100 and 298C T-1.



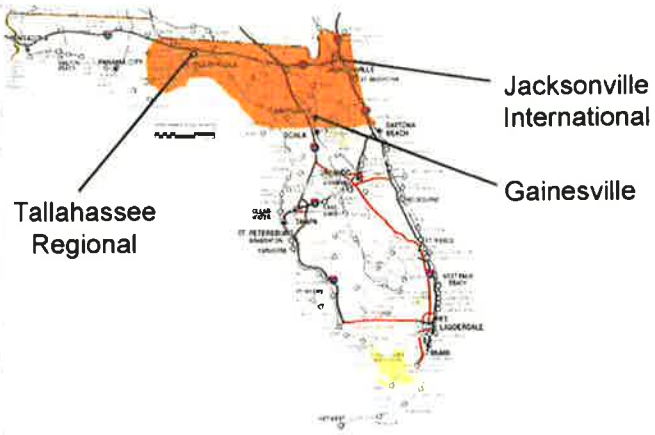
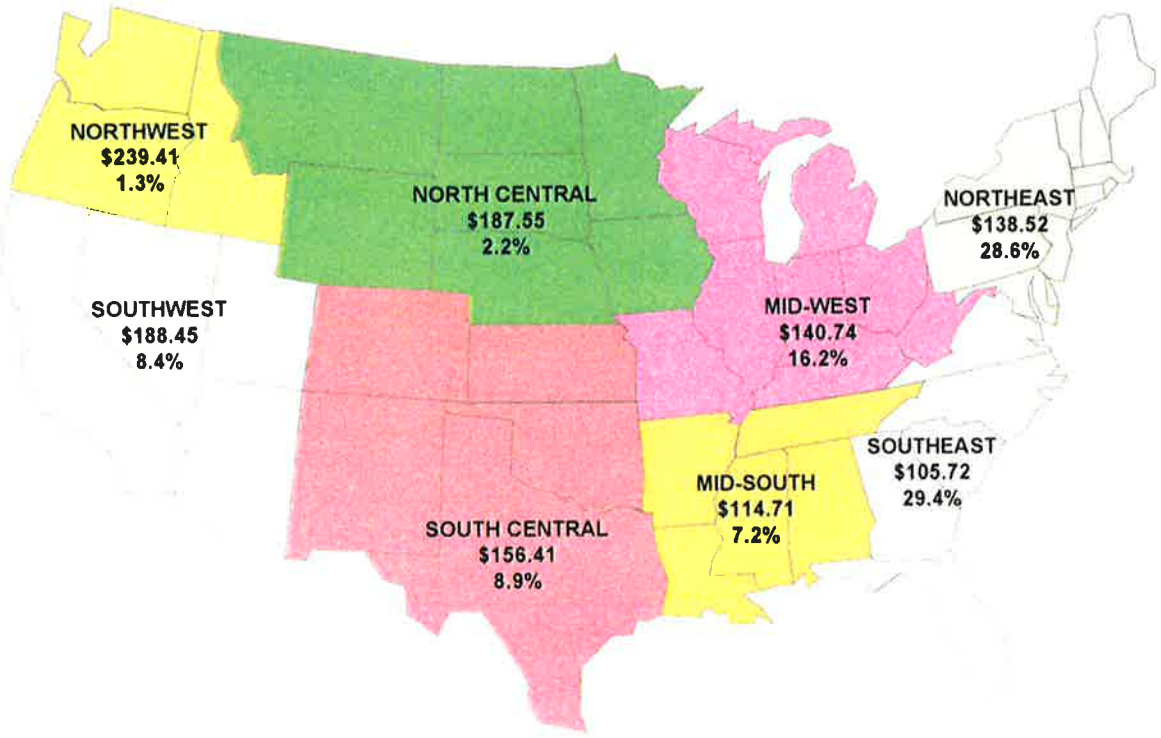


Exhibit 4
Commission on Aviation / Aerospace
Current Travel Patterns & Fares
Northeast Florida

Domestic Outbound O&D Passenger Regional Trends
From Northeast Florida Airports to U.S. Regions
(year ended December 31, 1999)

Northeast FL Airport (Origin)	US Region (Destination)								Grand Total
	Northeast	Midwest	Southeast	Southwest	South Central	Mid South	North Central	Northwest	
Outbound O&D Passengers									
Jacksonville	640,320	393,360	573,890	208,650	220,880	178,680	51,950	30,810	2,298,540
Tallahassee	73,490	42,570	228,080	21,760	23,710	15,240	8,150	4,950	417,950
Gainesville	40,820	26,250	37,670	10,620	9,990	10,700	4,080	2,380	142,510
Northeast FL Total	**754,630**	**462,180**	**839,640**	**241,030**	**254,580**	**204,620**	**64,180**	**38,140**	**2,859,000**
U.S Region Passenger Market Share									
Jacksonville	27.9%	17.1%	25.0%	9.1%	9.6%	7.8%	2.3%	1.3%	100.0%
Tallahassee	17.6%	10.2%	54.6%	5.2%	5.7%	3.6%	1.9%	1.2%	100.0%
Gainesville	28.6%	18.4%	26.4%	7.5%	7.0%	7.5%	2.9%	1.7%	100.0%
Northeast FL Total	**26.4%**	**16.2%**	**29.4%**	**8.4%**	**8.9%**	**7.2%**	**2.2%**	**1.3%**	**100.0%**
Average Domestic One-Way Fares									
Jacksonville	$131.06	$134.38	$95.26	$177.23	$145.55	$104.45	$184.52	$230.69	$128.75
Tallahassee	$190.96	$183.77	$126.08	$261.82	$234.75	$194.45	$204.14	$285.35	$162.50
Gainesville	$161.17	$166.22	$141.75	$258.53	$210.50	$172.39	$192.94	$256.76	$171.03
Northeast FL Total	**$138.52**	**$140.74**	**$105.72**	**$188.45**	**$156.41**	**$114.71**	**$187.55**	**$239.41**	**$135.79**

SOURCE: DOT O&D Survey, reconciled to Schedules T-100 and 298C T-1.



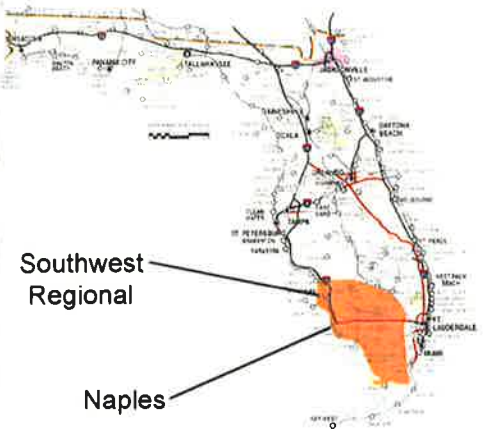


Exhibit 5
Commission on Aviation / Aerospace
Current Travel Patterns & Fares
Southwest Florida

Domestic Outbound O&D Passenger Regional Trends
From Southwest Florida Airports to U.S. Regions
(year ended December 31, 1999)

Southwest FL Airport (Origin)	US Region (Destination)								
	Northeast	Midwest	Southeast	Southwest	South Central	Mid South	North Central	Northwest	**Grand Total**
Outbound O&D Passengers									
Ft. Myers	807,840	813,320	195,220	83,030	93,080	58,310	94,230	18,800	2,163,830
Naples	21,330	5,110	14,010	3,360	3,260	1,780	240	340	49,430
Southwest FL Total	**829,170**	**818,430**	**209,230**	**86,390**	**96,340**	**60,090**	**94,470**	**19,140**	**2,213,260**
U.S Region Passenger Market Share									
Ft. Myers	37.3%	37.6%	9.0%	3.8%	4.3%	2.7%	4.4%	0.9%	100.0%
Naples	43.2%	10.3%	28.3%	6.8%	6.6%	3.6%	0.5%	0.7%	100.0%
Southwest FL Total	**37.5%**	**37.0%**	**9.5%**	**3.9%**	**4.4%**	**2.7%**	**4.3%**	**0.9%**	**100.0%**
Average Domestic One-Way Fares									
Ft. Myers	$123.67	$124.39	$115.63	$210.35	$155.10	$136.74	$145.01	$220.57	$130.02
Naples	$134.14	$145.11	$100.88	$244.74	$175.23	$131.77	$190.38	$242.03	$137.01
Southwest FL Total	**$123.94**	**$124.52**	**$114.65**	**$211.69**	**$155.78**	**$136.59**	**$145.13**	**$220.95**	**$130.17**

SOURCE: DOT O&D Survey, reconciled to Schedules T-100 and 298C T-1.

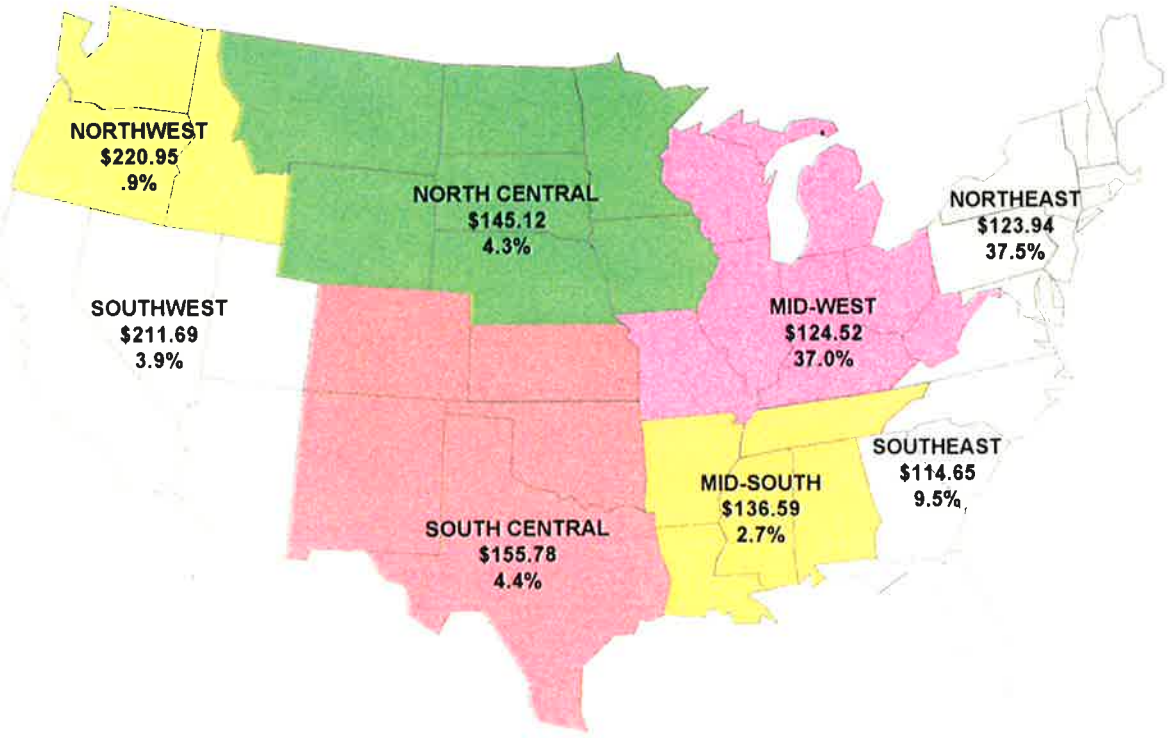


Exhibit 6
Commission on Aviation / Aerospace
Current Travel Patterns & Fares
Northwest Florida

Domestic Outbound O&D Passenger Regional Trends
From Northwest Florida Airports to U.S. Regions
(year ended December 31, 1999)

Northwest FL	US Region (Destination)								
Airport (Origin)	Northeast	Midwest	Southeast	Southwest	South Central	Mid South	North Central	Northwest	**Grand Total**
Outbound O&D Passengers									
Pensacola	109,560	79,240	143,430	51,930	56,880	21,060	12,850	13,720	488,670
Ft. Walton Beach	72,540	67,470	96,370	22,950	34,480	28,780	9,120	4,560	336,270
Panama City	39,170	35,940	31,370	13,940	14,050	7,750	4,840	3,490	150,550
Northwest FL Total	**221,270**	**182,650**	**271,170**	**88,820**	**105,410**	**57,590**	**26,810**	**21,770**	**975,490**
U.S Region Passenger Market Share									
Pensacola	22.4%	16.2%	29.4%	10.6%	11.6%	4.3%	2.6%	2.8%	100.0%
Ft. Walton Beach	21.6%	20.1%	28.7%	6.8%	10.3%	8.6%	2.7%	1.4%	100.0%
Panama City	26.0%	23.9%	20.8%	9.3%	9.3%	5.1%	3.2%	2.3%	100.0%
Northwest FL Total	**22.7%**	**18.7%**	**27.8%**	**9.1%**	**10.8%**	**5.9%**	**2.7%**	**2.2%**	**100.0%**
Average Domestic One-Way Fares									
Pensacola	$156.28	$149.72	$149.72	$228.01	$180.33	$150.37	$182.56	$232.27	$166.28
Ft. Walton Beach	$142.83	$135.06	$107.79	$299.63	$177.34	$122.65	$169.76	$244.50	$145.85
Panama City	$170.46	$136.22	$164.06	$260.62	$204.54	$164.01	$188.75	$268.65	$175.01
Northwest FL Total	**$154.38**	**$141.65**	**$136.48**	**$251.63**	**$182.58**	**$138.35**	**$179.32**	**$240.66**	**$160.59**

SOURCE: DOT O&D Survey, reconciled to Schedules T-100 and 298C T-1.

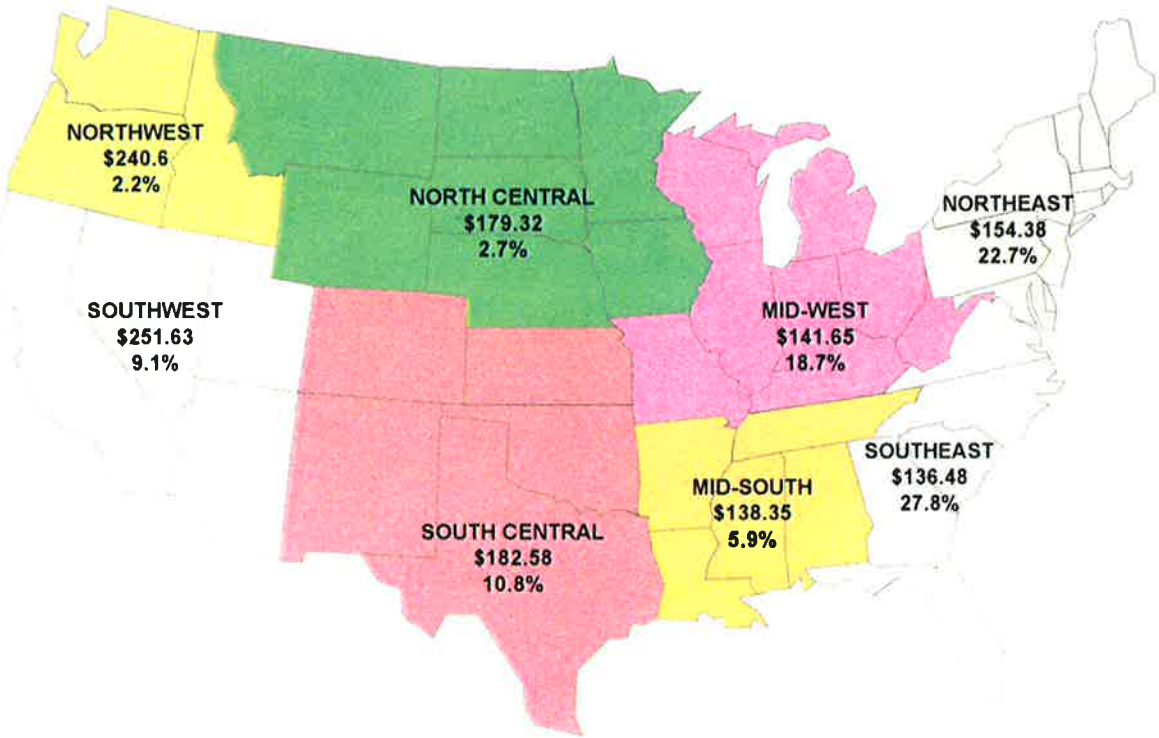


Exhibit 8b
Summary of Weekly Departures
by Equipment Type
(excluding MCO, MIA, FLL, and TPA)
July 2000

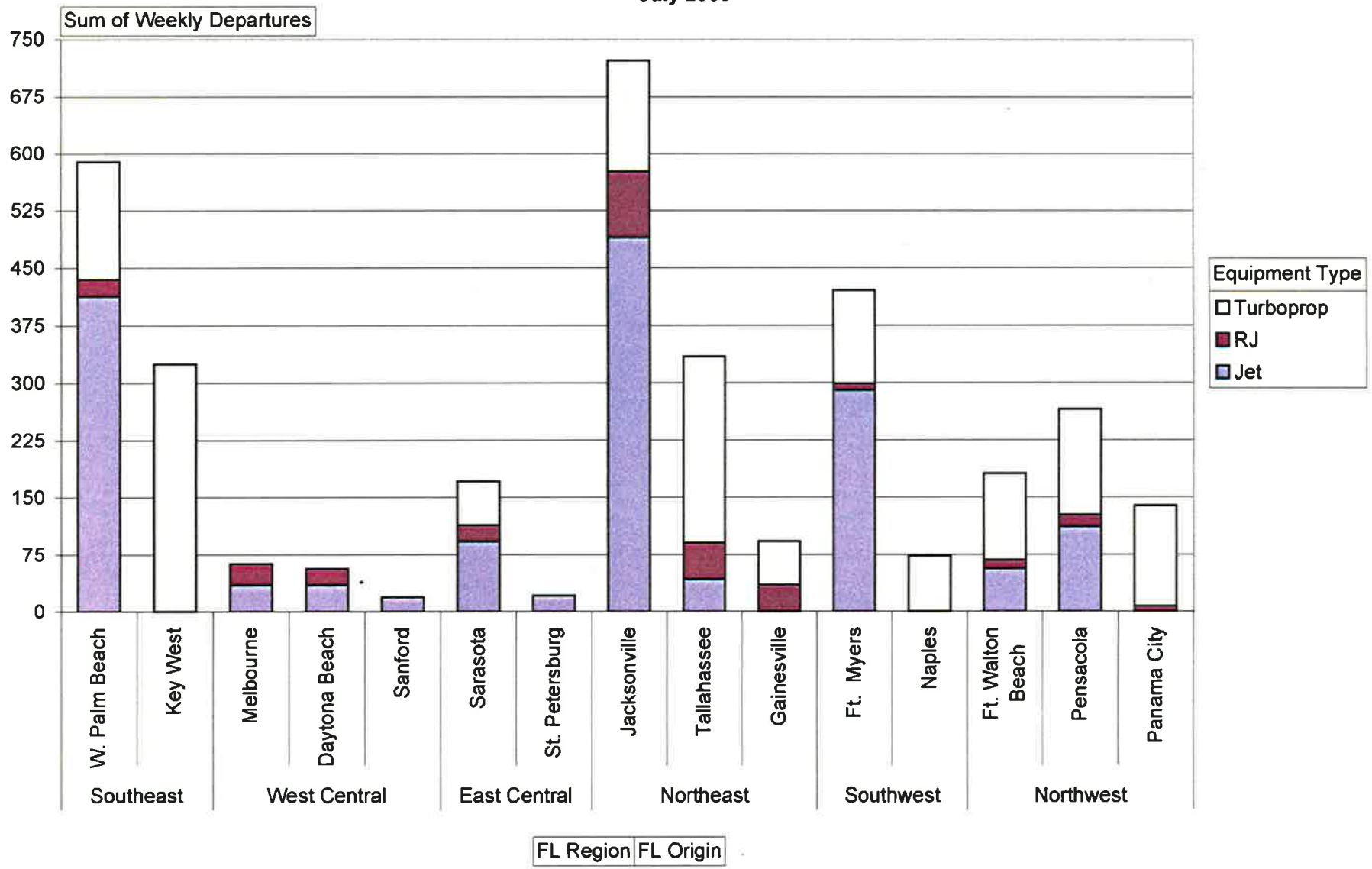
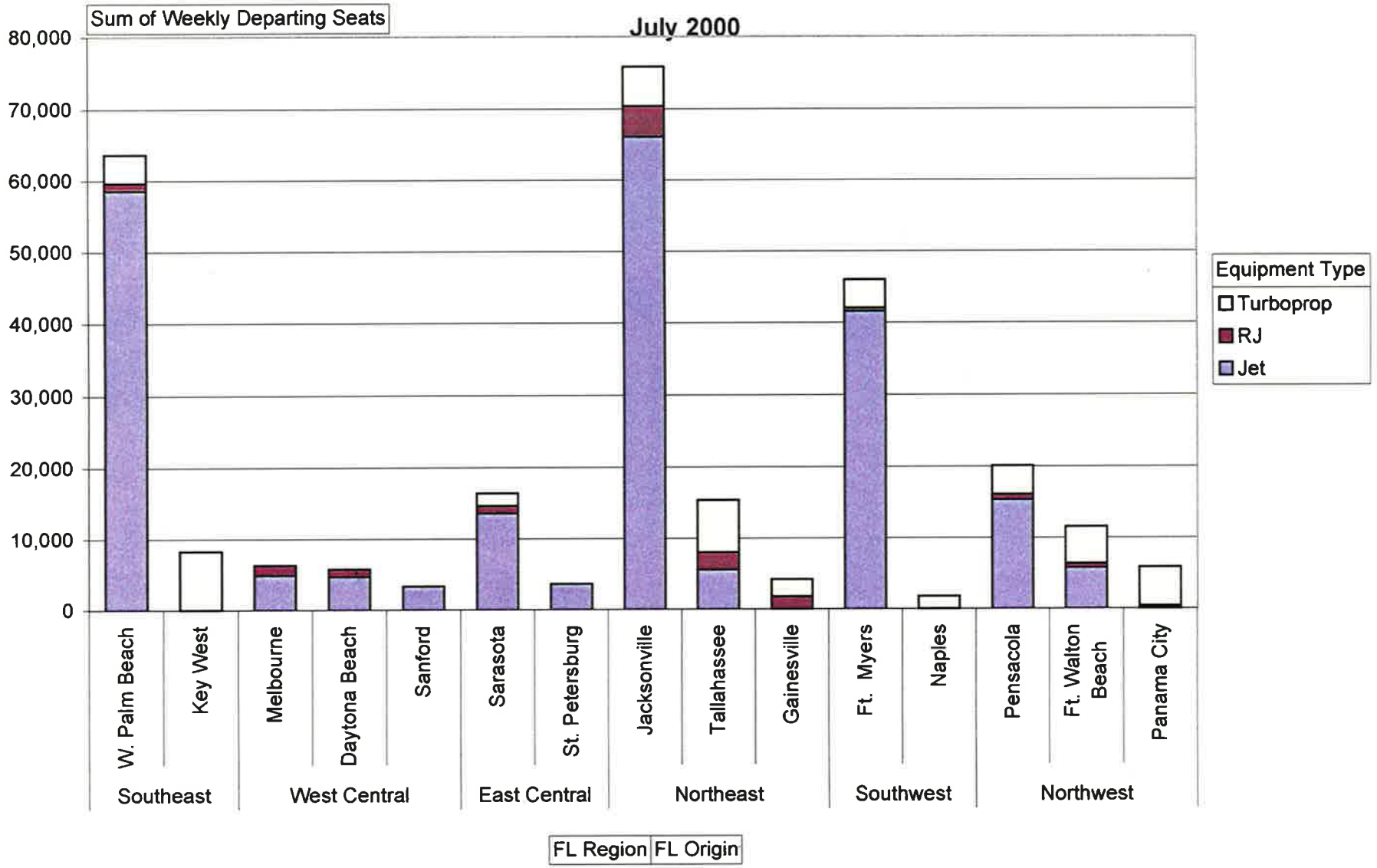
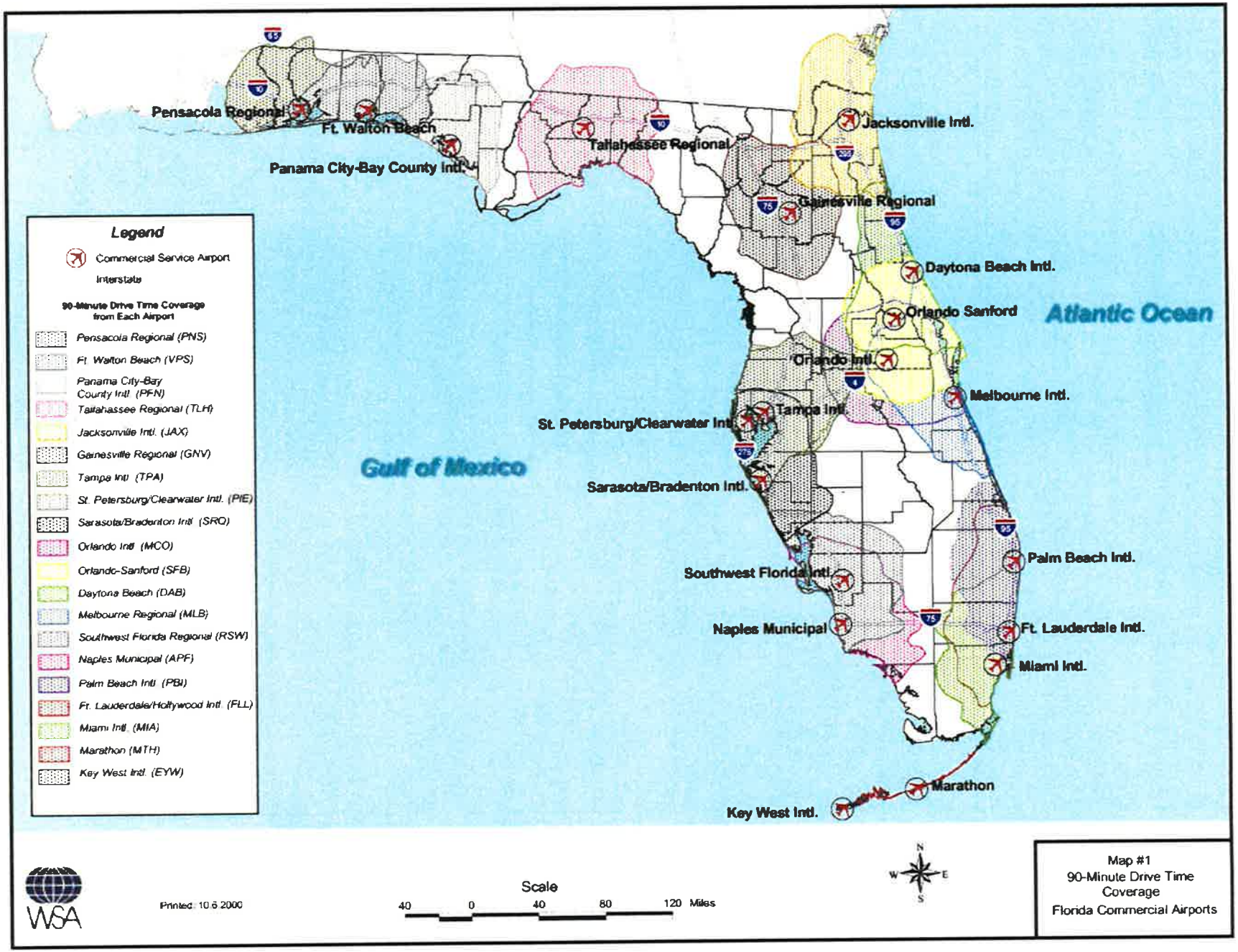
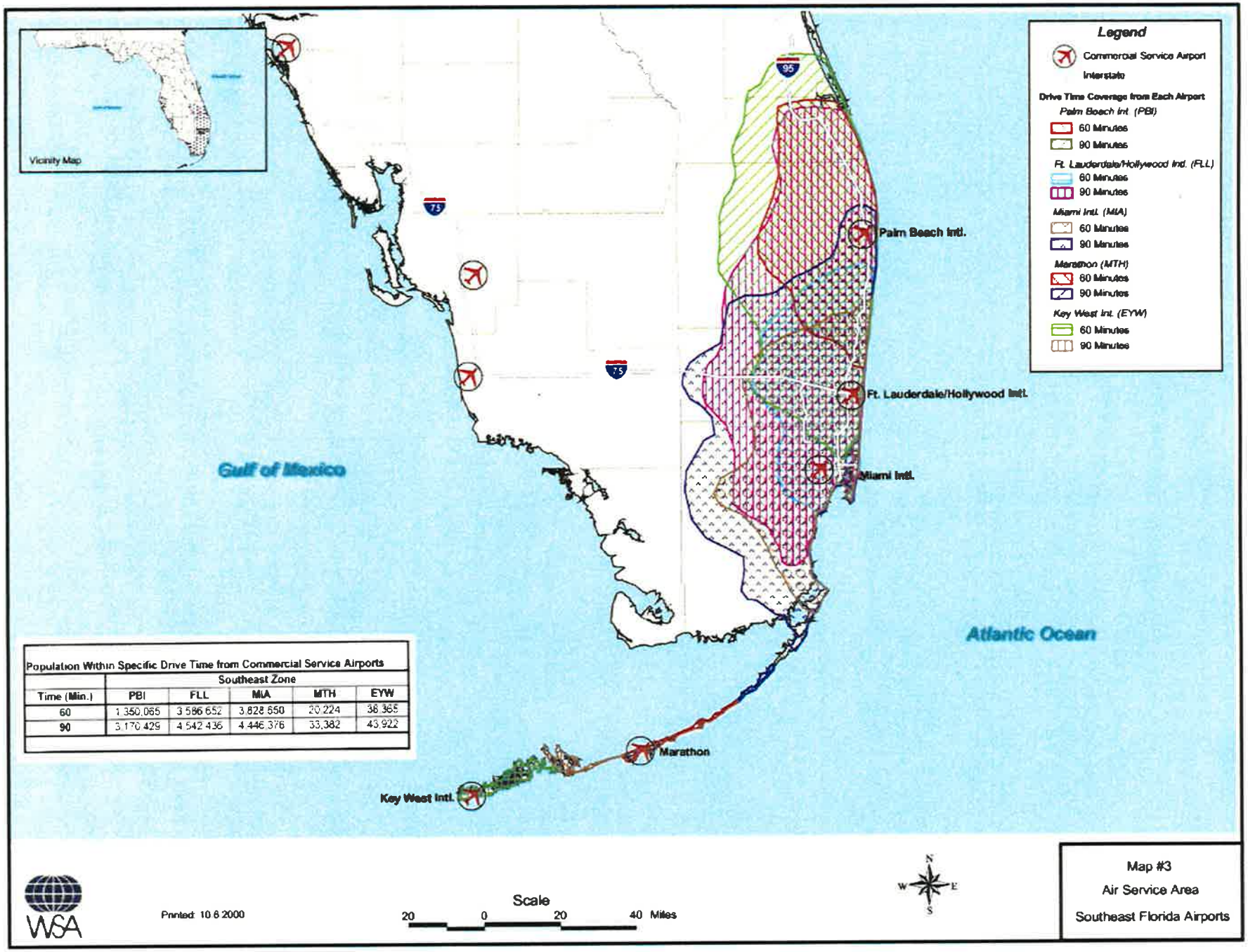


Exhibit 9b
Summary of Weekly Scheduled Departing Seats
by Equipment Type
at All Florida Airports (excluding MCO, MIA, FLL, and TPA)




Legend
Commercial Service Airport
Interstate
90-Minute Drive Time Coverage from Each Airport
Pensacola Regional (PNS)
Ft. Walton Beach (VPS)
Panama City-Bay County Intl. (PFN)
Tallahassee Regional (TLH)
Jacksonville Intl. (JAX)
Gainesville Regional (GNV)
Tampa Intl. (TPA)
St. Petersburg/Clearwater Intl. (PIE)
Sarasota/Bradenton Intl. (SRQ)
Orlando Intl. (MCO)
Orlando-Sanford (SFB)
Daytona Beach (DAB)
Melbourne Regional (MLB)
Southwest Florida Regional (RSW)
Naples Municipal (APF)
Palm Beach Intl. (PBI)
Ft. Lauderdale/Hollywood Intl. (FLL)
Miami Intl. (MIA)
Marathon (MTH)
Key West Intl. (EYW)
Pensacola Regional
Ft. Walton Beach
Panama City-Bay County Intl.
Tallahassee Regional
Jacksonville Intl.
Gainesville Regional
Daytona Beach Intl.
Orlando Sanford
Orlando Intl.
Melbourne Intl.
Tampa Intl.
St. Petersburg/Clearwater Intl.
Sarasota/Bradenton Intl.
Southwest Florida Intl.
Palm Beach Intl.
Naples Municipal
Ft. Lauderdale Intl.
Miami Intl.
Marathon
Key West Intl.
Gulf of Mexico
Atlantic Ocean
WSA
Printed: 10.6.2000
Scale
40 0 40 80 120 Miles
N
W E
S
Map #1
90-Minute Drive Time Coverage
Florida Commercial Airports



Population Within Specific Drive Time from Commercial Service Airports

	Southeast Zone				
Time (Min.)	PBI	FLL	MIA	MTH	EYW
60	1,350,065	3,586,652	3,828,650	20,224	38,365
90	3,170,429	4,542,436	4,446,376	33,382	43,922

WSA

Printed: 10.6.2000

Scale

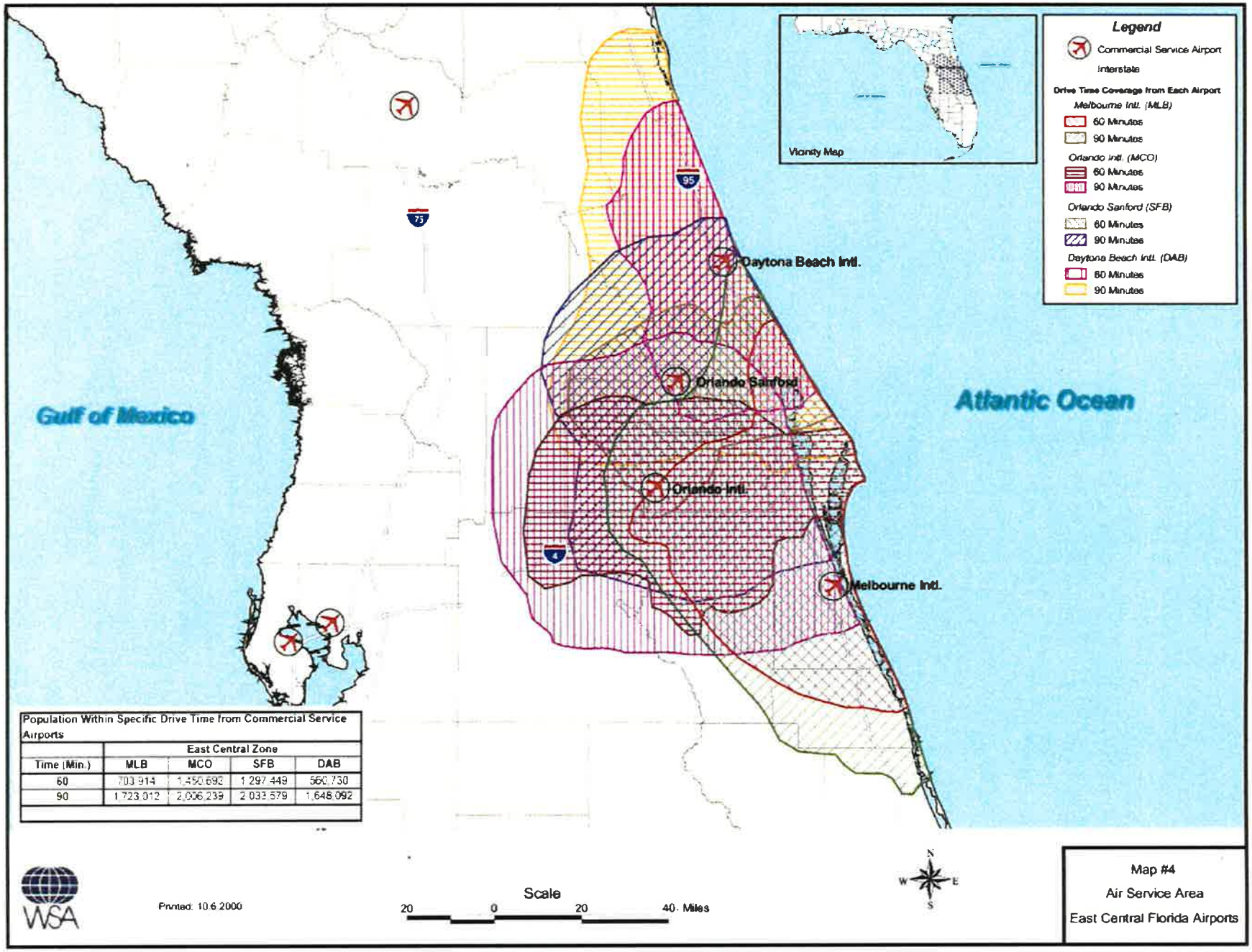
20 0 20 40 Miles

N W E S

Map #3

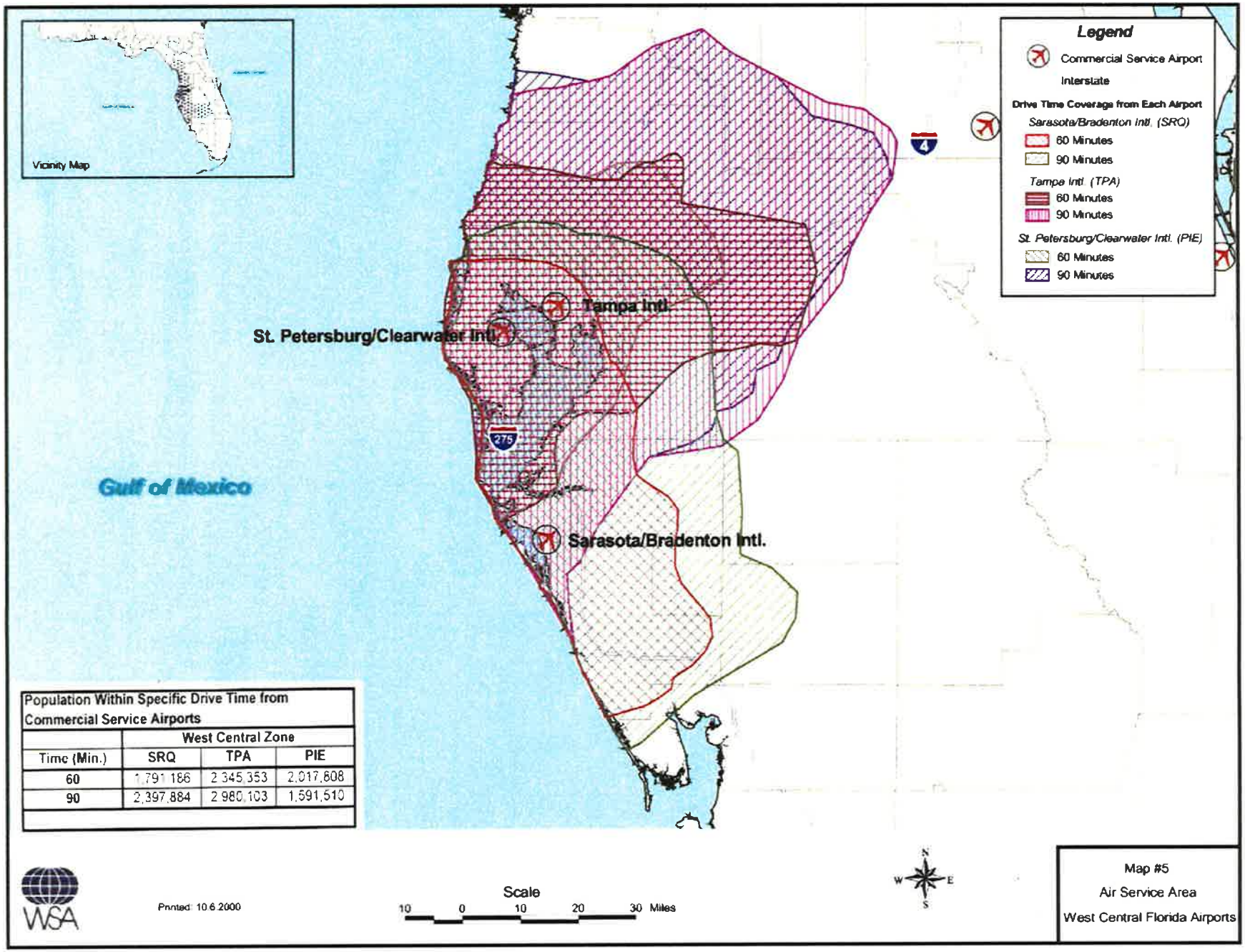
Air Service Area

Southeast Florida Airports



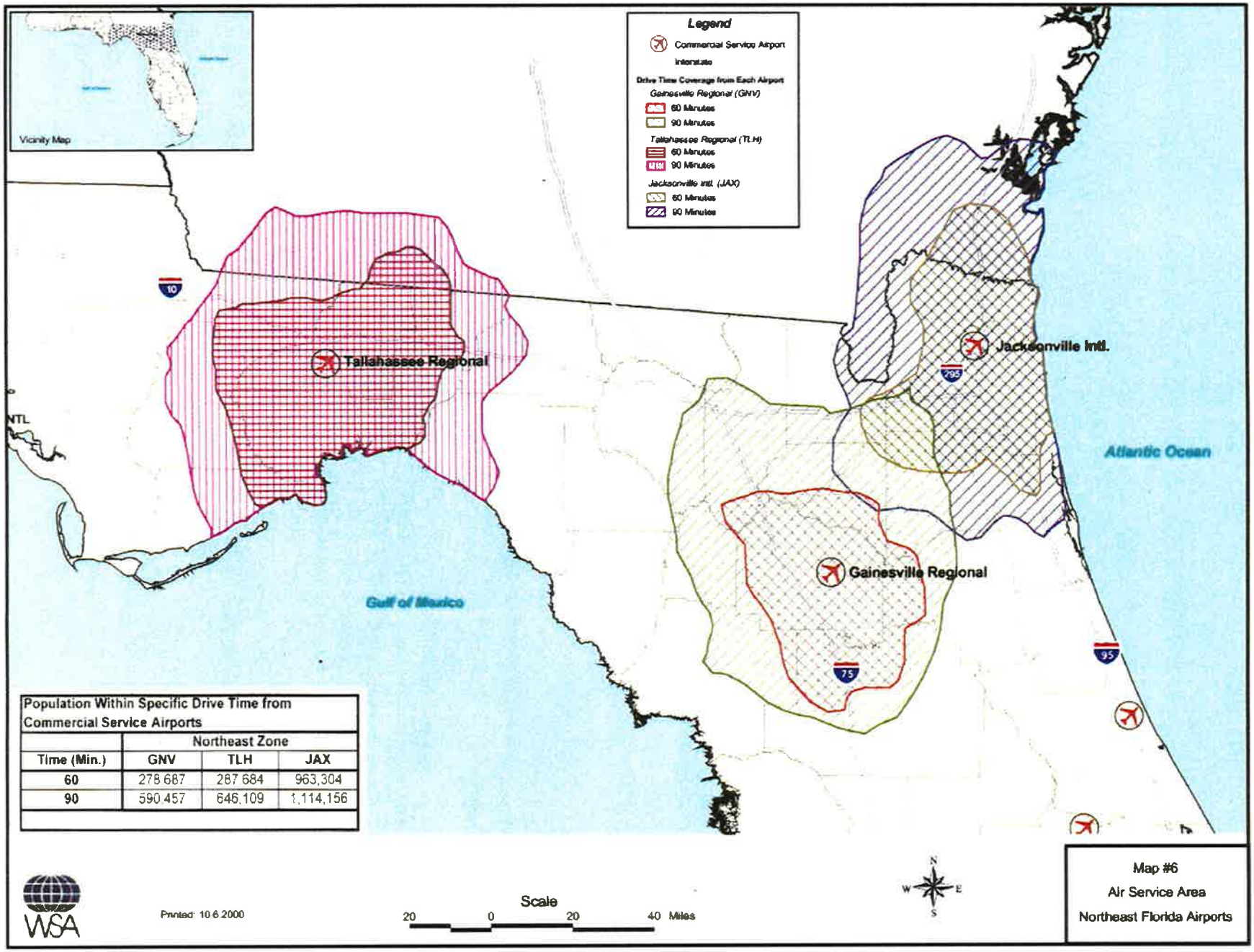
Population Within Specific Drive Time from Commercial Service Airports

	East Central Zone			
Time (Min.)	MLB	MCO	SFB	DAB
60	703,914	1,450,690	1,297,449	560,730
90	1,723,012	2,006,239	2,033,579	1,645,092



Population Within Specific Drive Time from Commercial Service Airports

	West Central Zone		
Time (Min.)	SRQ	TPA	PIE
60	1,791,186	2,345,353	2,017,608
90	2,397,884	2,980,103	1,591,510



Population Within Specific Drive Time from Commercial Service Airports			
	Northeast Zone		
Time (Min.)	GNV	TLH	JAX
60	278,687	287,684	963,304
90	590,457	646,109	1,114,156

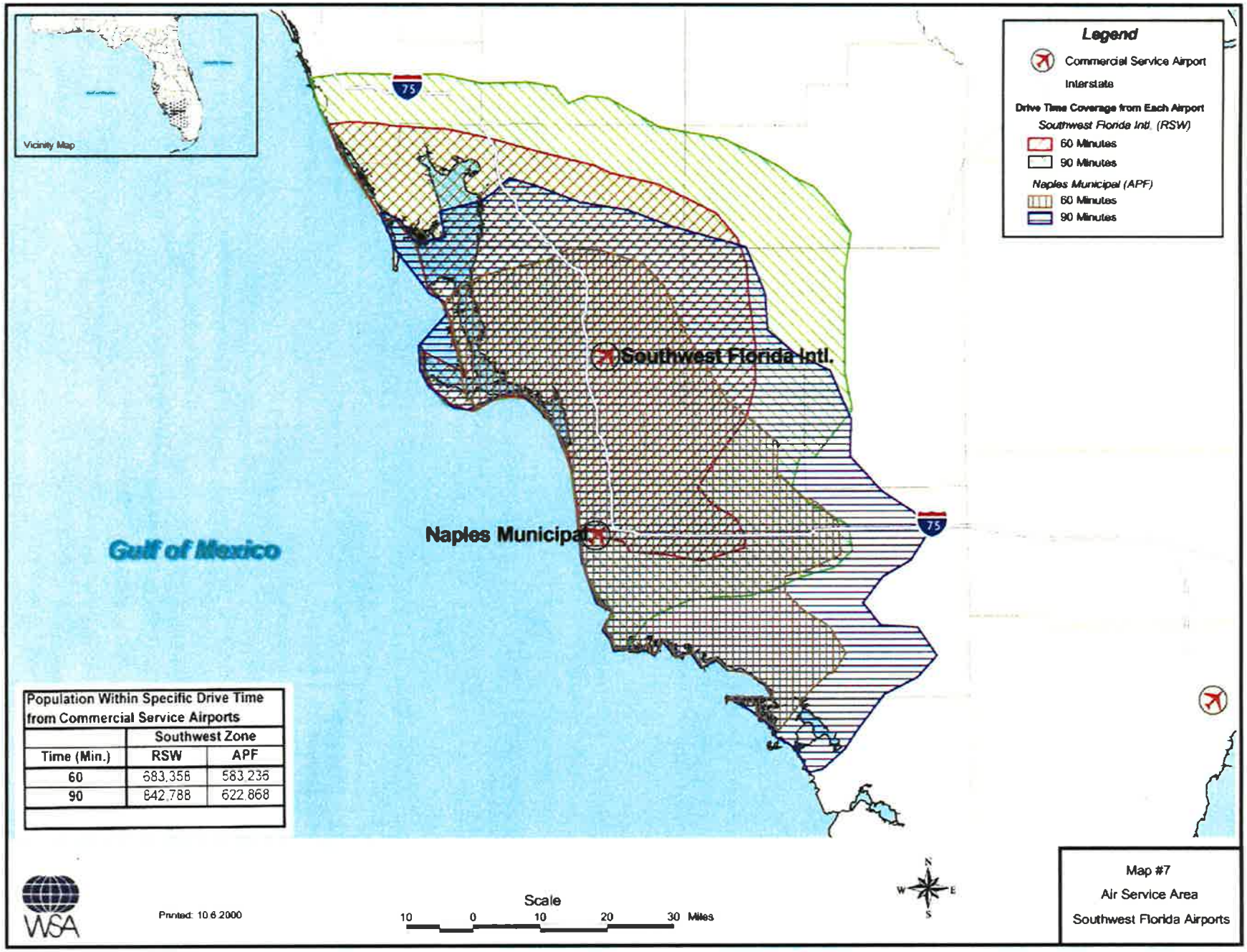
WSA

Printed: 10.6.2000

Scale
20 0 20 40 Miles

N W E S

Map #6
Air Service Area
Northeast Florida Airports



Population Within Specific Drive Time from Commercial Service Airports		
	Southwest Zone	
Time (Min.)	RSW	APF
60	583,356	583,236
90	642,788	622,868