Trends and Market Forces Shaping Small Community Air Service in the United States

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Introduction to paper series

This report, *Trends and Market Forces Shaping Small Community Air Service in the United States,* is the first in a series of papers written under the umbrella of the MIT Small Community Air Service White Paper series. The aim of the paper series is to examine and analyze the past, current, and anticipated future trends of small community air service in the United States. The series is intended for a general audience of airline and airport executives, aviation policy makers, the news media, and anyone with an interest in the availability of commercial air service at the nation's smaller airports. The authors of this paper series hope that these reports will serve to inform the policy debate with relevant and accurate statistical analysis, such that those responsible for deciding the future of small community air service will do so armed with factual basis for their actions.

The authors of the MIT Small Community Air Service White Paper series are members of the Massachusetts Institute of Technology's International Center for Air Transportation, one of the nation's premier centers for aviation, airline, and airport research. Financial support for study authors has been provided in part by the MIT Airline Industry Consortium, an interdisciplinary group of airlines, airport councils, policy makers, and advocacy groups dedicated to improving the state of the practice of air transportation research in the United States. However, any views or analyses presented in this and all future reports are the sole opinions of the authors and do not reflect the positions of MIT Airline Industry Consortium members or MIT.

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Executive Summary

This first report in the MIT Small Community Air Service White Paper series aims to provide a high-level overview and analysis of recent commercial airline scheduling trends in the United States. While service at many of the nation's largest airports is assessed in this report, particular attention is paid to activity at small- and medium-sized airports in the U.S. An airport- and airline-specific analysis is conducted with a focus on relevant changes in capacity in the target markets. The effects of the potential short-term and long-term exit of the 37-50 seat regional jet (RJ) and its potential replacement by the 51-76 seat RJ in some markets is discussed in detail. A taxonomy analysis of smaller U.S. airports is conducted to identify those that may be at risk for future flight reductions or complete discontinuation of commercial air service. Several appendices summarizing scheduling trends at 462 U.S. airports conclude the report.

The past six years have been challenging ones for domestic air service in the United States. Most airports have seen a reduction in scheduled domestic flights as a result of a difficult global economic climate and a U.S. recession, high and volatile fuel prices, and a recent trend of "capacity discipline" strategies by major airlines. The nation's small- and medium-sized airports have been disproportionally affected by these reductions in service, and recent airline behavior appears to signal a trend towards consolidation of service at the largest airports with fewer direct flights available from smaller airports.[1]

Capacity discipline evolved in response to challenging economic conditions as airline managers shifted their attention away from a strategy focused on capacity expansion to one that prioritized high yields and load factors. Instead of operating as many flights as possible in an attempt to gain market share, large airlines began a more efficient capacity and network management paradigm in an attempt to reduce operating costs by removing redundant flying and rationalizing service at some smaller hubs. This profitability-focused management strategy helped the airlines' balance sheets and reversed previous trends of low yields and annual losses. However, this pursuit of improved airline efficiency resulted in cutbacks in domestic service at many U.S. airports.

The Trends Analysis section of this report provides many graphs and tables that summarize how domestic air service has changed at America's smaller airports over the last six years. The data reveal the following trends that will continue to shape small community air service for the rest of the decade:

Airlines have shown a clear trend of consolidating service at the nation's largest airports.

The United States' 29 largest airports (by 2011 enplanements) lost 8.8% of their yearly scheduled domestic flights between 2007 and 2012, compared to a 21.3% reduction in scheduled domestic flights at smaller airports during the same period. Much of this service reduction at smaller airports is a result of large network carriers reducing frequency to large hubs and removing direct flights to other small- and medium-sized communities. While the last six years have generally been a period of growth for low-cost carriers (LCCs) and ultra-low cost carriers (ULCCs), these airlines have had a historically limited presence at smaller airports.

[1] In this white paper, "smaller airports" refers to airports classified as medium-hubs, small-hubs, or non-hubs by the FAA. See Appendix A for a detailed discussion of FAA hub types and the data used in this study.

Remaining distinctions between medium-hub and small-hub airports will continue to blur.
"Medium-hub" airports, which the FAA defines as airports that enplaned between 0.25% and 1% of the nation's air traffic passengers in a given year, have felt the biggest brunt of changing airline network strategies. Many medium-hubs had been built up by Southwest Airlines as alternative secondary airports for passengers in multi-airport regions with congested large-hubs. Scheduled domestic flights from these airports were cut by 26.2% from 2007-2012—the largest decline among any airport category.

"Right-gauging" of service will continue at the nation's smallest airports, but it's unlikely that many will go dark completely for a prolonged period of time.
Airlines continue to search for the correct gauge of aircraft to serve the smallest airports in the United States, including those funded by Essential Air Service (EAS) subsidies. In some markets, small turboprop aircraft operated by independent "ultra-regional" carriers like Cape Air and Great Lakes Airlines are replacing larger prop planes. At other small airports, turboprop service has been replaced by 37-50 seat regional jets (RJs). Upgauging to larger RJ service in some markets has also taken place, albeit slowly. However, relatively few airports have lost all their commercial air service over the past six years—network carriers who have exited these markets have often been quickly replaced by ULCCs or ultra-regional service, albeit at reduced frequencies and sometimes with fewer available connecting options.

Small communities will continue to take creative approaches to winning new service.
Small airports have continued the courtship process with the nation's airlines to keep network carrier air service in their communities. Many communities have begun to open up their checkbooks to offer financial incentives to airlines to either retain service or open new routes. Along with direct financial transfers in exchange for service, airports have also offered gratis advertising, revenue guarantees, and waived landing fees to attract airlines. These incentives can reduce the risk of providing new service. However, conducting too many of these deals runs the risk of drawing the ire of incumbent airlines, who may threaten to exit if they do not receive the same preferential treatment as a new entrant.

Looking forward: The future of small community air service in the 2010s
The future of small community air service depends on four factors: whether the network carriers and Southwest will continue to yield small community markets to ultra-regional carriers; whether the economic recovery in small-town America will continue enough to convince airlines that more domestic service at these airports is economically justified; whether new legislation will negatively affect regional airlines; and whether airlines will continue to focus on a profitability-based management strategy or shift their collective focus to other metrics to drive their strategic decisions.

Most likely, small communities will not be able to recover the same level of service in the near term that they received during the capacity-expansion era. These airports will likely see fewer flights operated by smaller aircraft belonging to a new breed of ultra-regional carriers. Airports in close geographic proximity to major hubs and those with a systemic lack of local demand may be at risk of losing all of their network carrier service in the next five years, although some of these flights may be replaced by infrequent ULCC service to vacation destinations. As airlines continue to consolidate their service at their largest hubs—and continue to consolidate with each other—small community airports will also likely see further reductions in their connectivity to the global air transportation network.

Trends Analysis

Airlines have consolidated air service around the nation's largest airports.

Figure 1 shows the aggregate number of annual scheduled domestic departures from U.S. airports. Departures are divided into two categories: those flights that depart from large-hub airports are shown in red, and those that depart from smaller airports are shown in gray.

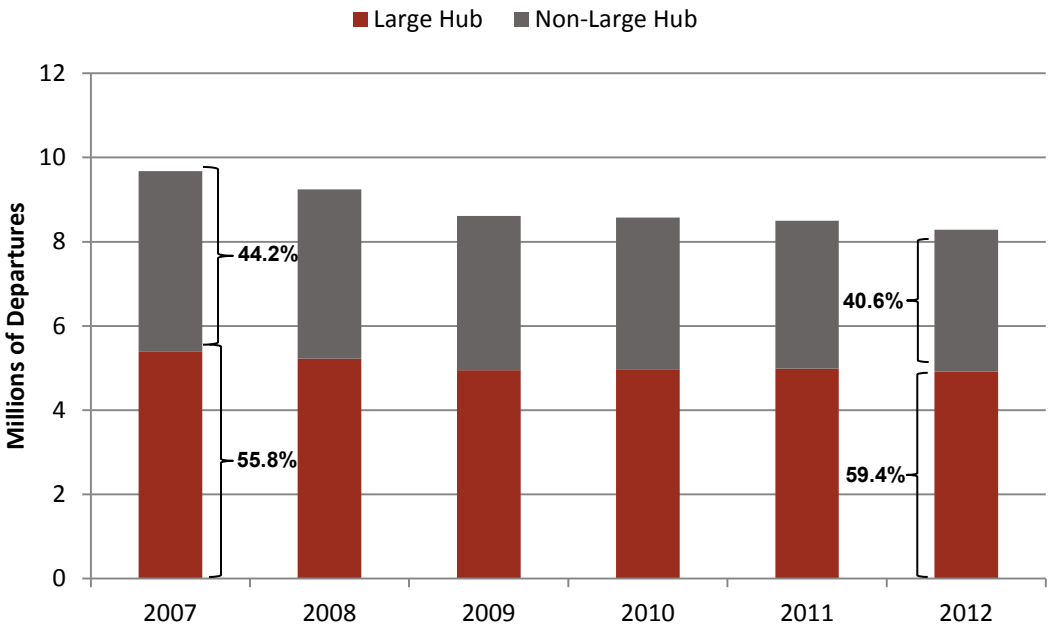

Figure 1: Scheduled domestic departures from all U.S. airports

As a result of a prolonged economic downturn, high fuel prices, and a new breed of airline strategy focused on increased load factors and capacity discipline, about 1.4 million yearly scheduled domestic flights have been cut from the U.S. air transportation system from 2007 to 2012. Also of note is the changing distribution of flights between larger airports and smaller airports. In 2007, scheduled domestic departures from large-hub airports made up 55.8% of the total—in 2012, this percentage had grown to 59.4%. This speaks to a pattern of airlines reducing service in smaller markets while retaining or bolstering service in their largest markets. In other words, airlines have been consolidating service at the nation's largest airports while cutting back on service to small- and medium-sized airports.

Smaller airports have suffered significant capacity reductions

While the large-hub airports have been spared from much of the brunt of airline service reductions, smaller airports have seen a much more severe decline in service. Figure 2 shows that scheduled domestic departures from smaller U.S. airports decreased by 21.3% from 2007-2012, compared to a decrease of 8.8% at large-hub airports over the same time period. Furthermore, as Table 1 shows, reductions in service were not applied equally across the entire U.S. air transportation network. In fact, medium-hub airports—not the small-hub or non-hub airports—saw the largest decrease in departures

as a percentage of total from 2007-2012 at 26.2%. Small-hub airports saw 18.2% of their domestic flights cut on average between those years, and non-hub airports received a cutback of 15.4% of domestic departures. However, EAS airports, whose levels of service are mandated by the federal government, performed the best during the study period, losing only 5.0% of their scheduled domestic departures.

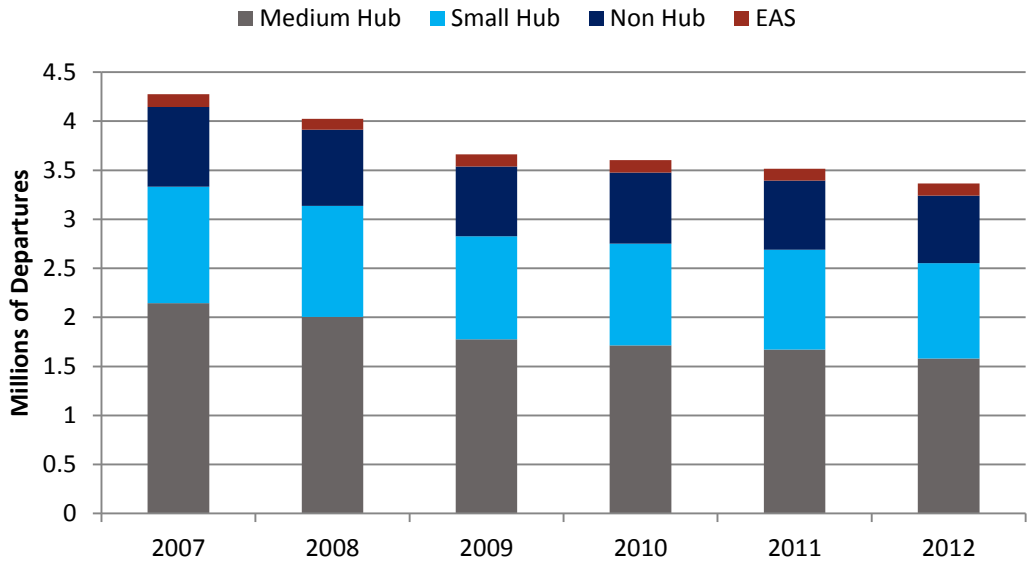

Figure 2: Scheduled domestic departures at smaller U.S. airports

Airport Type	% change in domestic departures (2007-2012)
Large Hub	-8.8%
Medium Hub	-26.2%
Small Hub	-18.2%
Non-Hub	-15.4%
Essential Air Service (EAS)	-5.0%
All Smaller Airports	**-21.3%**
All Airports	**-14.3%**

Table 1: Percent change in scheduled domestic departures by airport hub type, 2007-2012

Most of the reductions in departures at medium- and small-hub airports have been on routes to other smaller airports. That is, while passengers in Boise, ID, can still reach Reno, NV, on commercial air service, previously existing direct flights have been cut and replaced by connecting service through Salt Lake City, UT, for instance. The frequency of large-hub service from smaller airports has also been typically reduced.

Today's medium-hub airports include Oakland, CA (OAK), Providence, RI (PVD), and Love Field in Dallas, TX (DAL)—airports that Southwest Airlines targeted in the early stages of its development to serve as alternative options for passengers wishing to avoid the crowded hubs of competing airlines. In response, network carriers started to cut service to these airports in the face of stiff competition from Southwest

on both frequency and price. In many instances, these medium-hub airports can be found in metropolitan areas with multiple airports. Recently, network and low cost carriers alike have been consolidating their service offerings around one point in a metro area versus an equal distribution of service among many airports serving the same metropolitan area.

Specifically, as operating costs at Southwest have continued to rise, the nation's largest low-cost carrier has started to undertake the capacity discipline strategies also practiced by larger network carriers. Southwest cut nearly 10% of its domestic departures from 2007-2012. This has left some medium-hub airports in a precarious position—with both network carriers and Southwest cutting service, these "secondary airports" are often no longer able to compete on service or price with larger, nearby hubs. As such, many of the medium-hubs in multi-airport regions in the United States have seen the biggest reductions in service and connectivity over the past six years. We expect to see these medium-hubs begin to resemble current "small-hubs" in domestic service selection over the next five years, potentially increasing congestion as airlines and passengers alike continue to gravitate towards large airports.

Some of the smallest U.S. airports, such as Oxnard, CA, and Bullhead City, AZ, lost all of their commercial air service over the study period. However, fewer than 24 airports that had network carrier air service in 2007 now lack such service in 2012—even through record-high fuel prices and an economic recession, only a small proportion of the country's primary commercial service airports "went dark" completely. At many smaller airports, network carrier air service was quickly replaced by other commercial service from a new class of "ultra-low cost carriers" (ULCCs) like Allegiant Air and Spirit Airlines. Often branding themselves as vacation providers and offering extra-low base fares with higher-than-average ancillary fee structures, ULCCs enter airports that have been abandoned by network legacy carriers to provide infrequent direct service to vacation destinations such as Orlando, FL, or Las Vegas, NV. For instance, after US Airways and Northwest Airlines ended service from Arnold Palmer Regional Airport (LBE) near Latrobe, PA, Spirit Airlines entered the airport to provide service to Ft. Lauderdale, FL, Orlando, FL, and Myrtle Beach, SC.

The replacement of traditional network legacy carrier service with ULCC service to vacation destinations may have helped some smaller airports survive a temporary discontinuation of commercial flights. However, is infrequent service to vacation destinations as valuable to residents of a community as frequent network carrier service to a hub airport, from which connections can be made to other destinations throughout the country and the world? The second report in the Small Community Air Service White Paper series will address this question by proposing a connectivity model with which airports can be compared not just based on their level of service, but also on the quality of their connections to the global air transportation network.

Network carriers (and Southwest) have driven the capacity reductions at smaller airports

Most of the capacity reduction at small- and medium-sized U.S. airports has been due to decisions made by network carriers,[2] not LCCs. As Figure 3 shows, network carriers decreased the number of scheduled

[2] Here, "network carrier" refers to American Airlines, America West Airlines, Continental Airlines, Delta Air Lines, Northwest Airlines, United Airlines, and US Airways.

domestic flights they operated from smaller U.S. airports by 27.3% from 2007-2012. While Figure 4 shows that some low-cost carriers such as JetBlue Airways, Frontier Airlines, and AirTran Airways increased flights from these airports during the study period, this addition of service by the low-cost and ultra-low cost carriers was not enough to fully make up for the cuts in service from the legacy carriers.

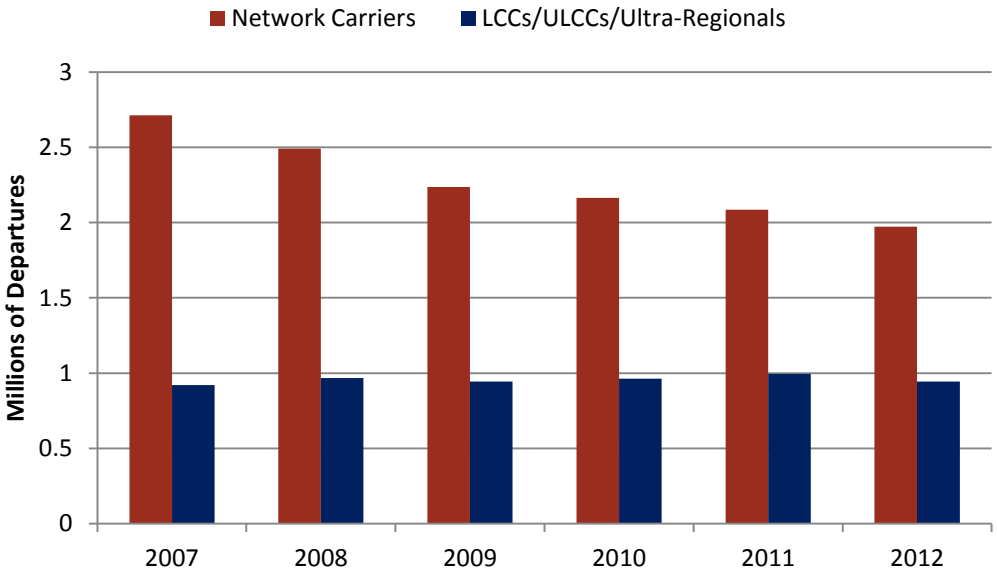

Figure 3: Scheduled domestic departures from smaller U.S. airports by marketing carrier type

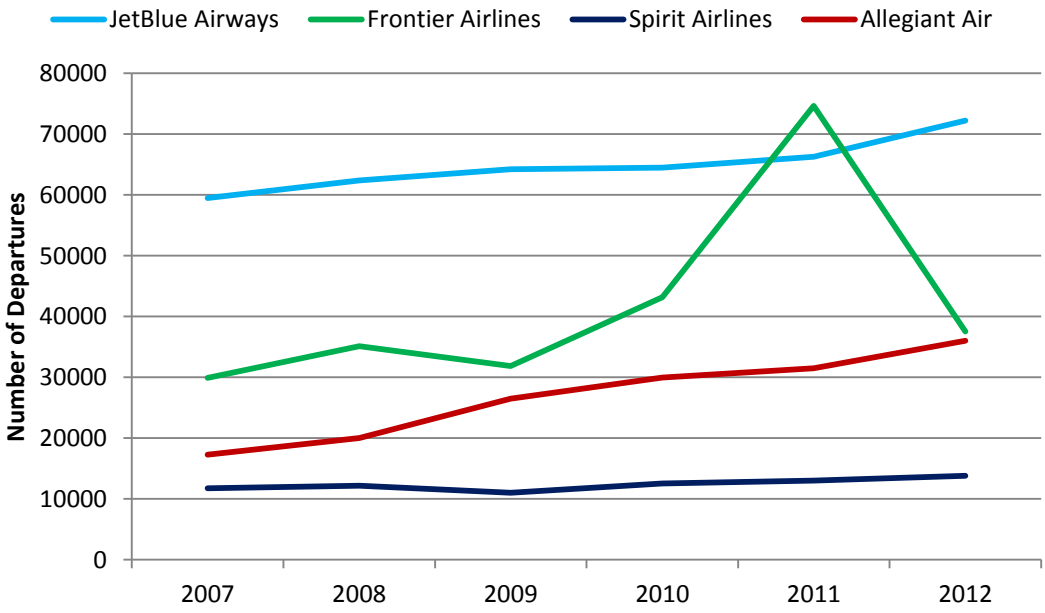

Figure 4: Low-cost/Ultra-low cost carrier scheduled domestic departures from smaller U.S. airports

The schedule trends also highlight one of many ways in which Southwest Airlines, previously hailed as a paragon of a low-cost carrier, has started to behave more like the other network legacy carriers in the past six years. While other LCCs/ULCCs were increasing flights and showing some growth in smaller

markets, Southwest Airlines was cutting scheduled flights at many of the markets it helped create, as shown in Figure 5. Southwest cut 9.8% of its scheduled domestic flights from smaller airports from 2007-2012, as opposed to a 21.3% increase in scheduled flights at these airports by LCC competitor JetBlue Airways. While Southwest did not cut flights as severely as the network legacy carriers in smaller markets, the airline's recent attempts at capacity discipline should be worrying to smaller airports—particularly medium-hubs—whose previous growth was fueled largely by new Southwest service.

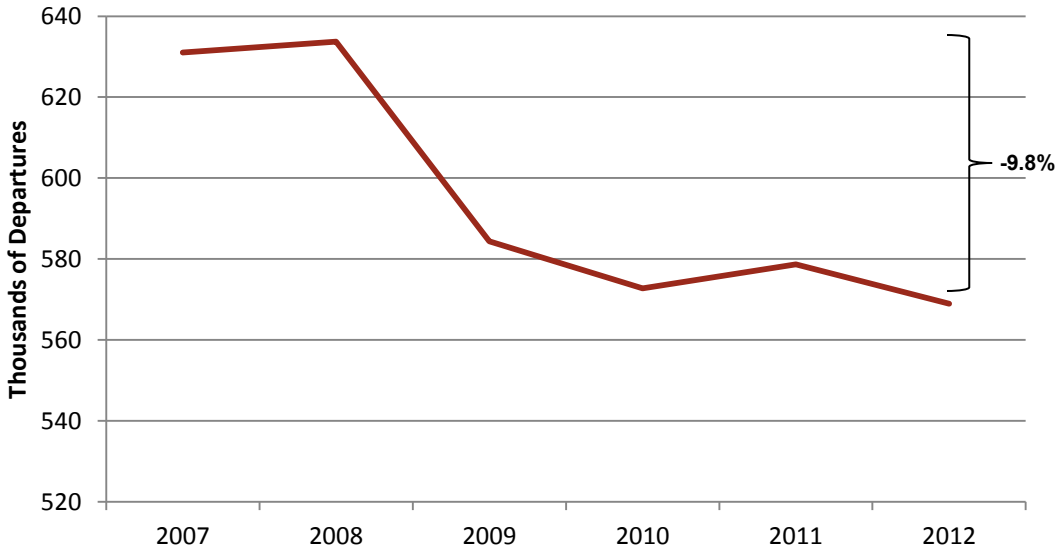

Figure 5: Southwest Airlines scheduled departures from smaller U.S. airports, 2007-2012

Network carriers continue to shift remaining small-market service to regional affiliates

Domestic small community air service operated by network carrier mainline aircraft has become increasingly rare. Table 2 shows the percentage of scheduled domestic departures from smaller airports that were operated by mainline or regional aircraft for several large U.S. airlines in 2007 and 2012. The table highlights how the network carriers have chosen different strategies for the deployment of their regional fleets, and that those strategies have continued to shift in recent years. For instance, Delta Air Lines has held the proportion of small community air service operated by mainline aircraft and regional aircraft relatively constant over the last few years.

Airline	2007		2012	
	% Mainline	% Regional	% Mainline	% Regional
American	30.8%	69.2%	31.2%	68.8%
Delta/Northwest	24.9%	75.1%	25.9%	74.1%
United/Continental	21.0%	79.0%	12.5%	87.5%
US Airways/America West	26.3%	73.7%	19.5%	80.5%

Table 2: Percentage of mainline/regional scheduled domestic departures from smaller U.S. airports

On the other hand, United Airlines has started to shift operations at smaller airports to their regional partners. Note that even though the percentage of service provided by United regional carriers has

increased over the last six years, this does not imply that United was adding regional capacity. Instead, the airline has simply cut mainline domestic service at these airports by a greater percentage than domestic regional service, leading to a greater fraction of flights operated by regional aircraft (nearly seven out of every eight United flights from smaller U.S airports in 2012 were operated by a regional aircraft). Some of the differences in trends between carriers are due to unique features of each airline's scope clause that may limit the number of regional aircraft that can be flown per the collective bargaining agreement. Potential changes in scope clauses as a result of the American Airlines/US Airways merger may continue to change the mix of mainline/regional aircraft for that combined carrier.

The players are changing in Essential Air Service (EAS) markets

The Essential Air Service program is a federal air subsidy program intended to ensure that a "minimal level of air service" is provided at selected small and rural airports in the United States.[3] Airports that receive EAS subsidies must be at least 70 miles from any medium- or large-hub airport. Subsidies vary by airport, but require operating airlines to provide direct service to a nearby medium- or large-hub airport such that passengers can connect to the domestic and international air transportation network. The stipulations of the EAS contracts limit carriers' ability to exit the markets without arranging for replacement service to be provided by another airline. As of October 2012, 120 communities in the contiguous United States received a total of nearly $225 million dollars per year in EAS subsidies.

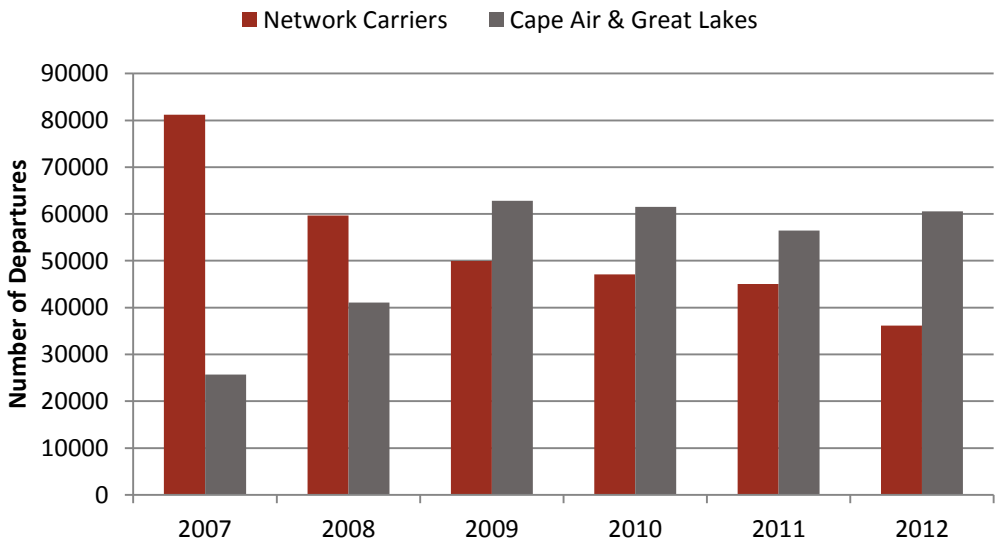

Figure 6: Essential Air Service (EAS) scheduled departures by marketing airline type

One of the most significant recent trends in small community air service is the extent to which the network carriers have exited Essential Air Service markets. Service that was previously provided by regional affiliates of network carriers is now being operated by a small handful of "ultra-regional" carriers: Great Lakes Airlines and Cape Air are the major players in these markets. These ultra-regionals

[3] U.S. DOT Office of Aviation Analysis. 1 April 2009. "What is Essential Air Service (EAS)?" http://www.dot.gov/sites/dot.dev/files/docs/easwhat.pdf

operate fleets of mostly small Cessna or Beechcraft aircraft with 8-19 seats that lack some amenities, but provide service from the smallest U.S. communities to nearby airports. The ultra-regionals operate under a different business model than the network carriers—for instance, Cape Air opens regional ticket offices in the small cities they serve to target local commuting passengers instead of relying on web distribution alone.

Passengers departing from airports served by these ultra-regional carriers may lose out on flight attendants and a multiple-class cabin, but on the whole have shown support for this type of service as both Cape Air and Great Lakes have continued to grow both their frequency and destinations served over the last six years. New entrant Silver Airways will also soon make a play for many of these markets, particularly as network carriers continue their swift exit.

While these airlines provide interline service to major hubs at which passengers can connect to network carrier service, it is also interesting to note that the ultra-regionals are some of the few carriers operating service *between* smaller airports. For instance, as of March 2013 Cape Air provides service from Albany, NY, to Massena International Airport in upstate New York—this type of service would never be provided by a network carrier in the current economic environment.

These ultra-regional airlines are likely to be a key component of small community air service in the United States over the next decade. The network carriers have shown a clear desire to exit the very smallest markets; their planes are not gauged correctly for the few passengers that fly these routes. Instead, the ultra-regional carriers will likely continue their path of growth as they assume the responsibility of providing service to many of the smallest airports in the United States.

The swan song of the 50-seat regional jet?

The 2000s may very well be recorded in aviation history as the Decade of the Regional Jet. Fueled by consumer preferences and compelling operating economics, network carriers started to replace small turboprop airplanes with 37-50 seat regional jets (RJs) to serve smaller markets. The Embraer ERJ-135/140/145 and the Canadair CRJ-100/200 series by Bombardier were two of the most popular variants of RJs to start serving these smaller routes. According to a report by MIT's Aleksandra Mozdzanowska, the number of regional jets in commercial service in the United States quickly increased from the 1990s to the early part of the 2000s.[4]

However, the trend of strong growth in 37-50 seat RJ service at smaller U.S. markets started to sharply reverse following the spike in fuel prices during 2007-2008. With higher fuel prices, the jet-powered RJs no longer were as attractive an economic choice to provide frequent service in short-haul markets. Even after fuel prices began to stabilize, a new round of airline capacity discipline further reduced the amount of regional jet service in the United States as airlines reduced frequencies across their networks. Since capacity discipline was mainly applied to smaller airports that were more likely to be served by small regional jets, RJ service was disproportionally affected. Figure 7 shows the extent of the decline of 37-50 seat RJ service in smaller markets over the last six years.

[4] Mozdzanowska, A. 2004. "Evaluation of regional jet operating patterns in the Continental United States."

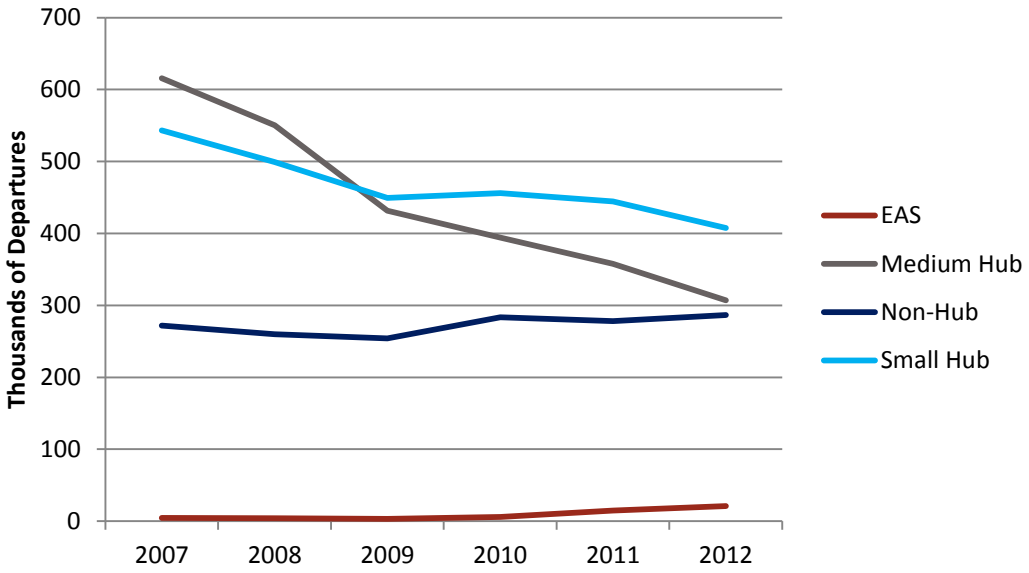

Figure 7: 37-50 seat RJ scheduled domestic departures at smaller U.S. airports

Much attention has been paid to this reversal of fortune in the small regional jet market segment. Widespread industry wisdom would hold that as the primary aircraft of choice for the smallest U.S. markets, smaller RJs would be removed from the non-hub markets *first* in reaction to unattractive fuel economics and curtailed domestic demand. However, Figure 7 shows that this is not the case. In fact, 50-seat RJ departures from non-hub markets have actually increased slightly over the last six years. Instead, smaller RJs are being removed at a rapid pace from medium- and small-hub airports. SkyWest Airlines, a large regional carrier that operates flights on the behalf of several network carriers, has led the charge in moving small RJs to the very smallest markets, even deploying 50-seat regional jets in some small Essential Air Service markets.

There are several factors that could explain this trend. The first is simply capacity discipline—just as network carriers began to cut domestic service across their network, particularly at medium- and small-hub airports, so too should we expect to see a proportional decline in smaller RJ service at these airport types. It is also possible that airlines began reallocating their smaller RJ fleet to their smallest markets (non-hubs) in an effort to "right-gauge" their fleet across their entire networks.

Some of the smaller RJ service at medium-hub airports may have also been replaced by larger, 76-seat regional jets, which were more efficient to operate during times of high fuel prices. As the next section shows, this pattern of upgauging regional jet service in medium-hubs did exist from 2007-2009. However, the trend has since flattened as a result of capacity discipline; instead of replacing two 50-seat RJ flights with two 76-seat RJ flights, airlines are instead replacing that service with just a single 76-seat regional jet. This behavior is one of the most important explanatory factors behind the significant reduction in flights at medium-hub and small-hub airports since 2007.

The 76-seat regional jet is picking up some of the slack, but cuts in service still loom

Some of the capacity previously provided by 50-seat regional jets has been replaced by 51-76 seat regional jets such as the Bombardier Canadair CRJ-700 and the Embraer E-175. These aircraft have proved popular in recent years—scheduled domestic flights operated by these larger RJs from smaller airports have increased by 19.2% from 2007-2012. In many markets, the opportunity to replace two 50-seat RJ flights by a single 76-seat RJ flight operating at a higher load factor has proven to be an attractive one for airlines, particularly in the era of capacity discipline. However, the 76-seat RJ has not been deployed equally across all market types. Figure 8 shows the changes in large regional jet domestic departures at smaller airports by airport hub type from 2007-2012. Larger regional jets have been introduced in medium-hub markets to replace some of the smaller RJ service that has been removed, but the rate of substitution has slowed in recent years. Small hub markets have seen limited introduction of larger RJs, while non-hub and EAS airports have seen almost no use of the 76-seat RJ.

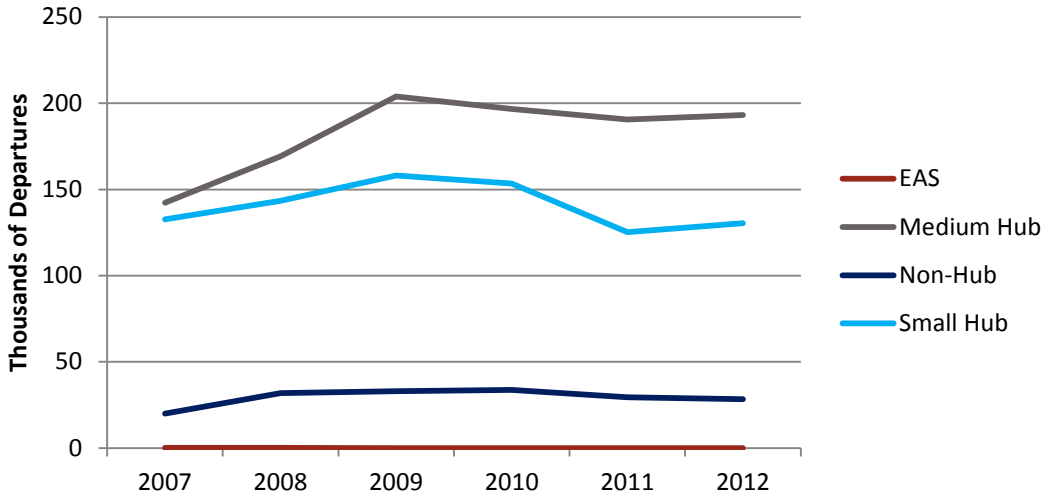

Figure 8: 51-76 seat RJ scheduled domestic departures at smaller U.S. airports

An important consideration for aviation planners moving forward will be the identification of characteristics that indicate whether a given market can support 76-seat regional jet service. Airports that fit this categorization might be able convince airlines to replace aging or inefficient 50-seat regional jets with (perhaps less frequent) 76-seat RJ service and retain their connectivity to key connecting hubs. However, there is no easy answer as to which markets can support larger RJ service. To be sure, airports with 76-seat RJ service are on average larger than those that have only 50-seat RJ service. Airports with 76-seat RJ service enplaned about 70,000 passengers on average in 2011, whereas those with only 50-seat RJ service enplaned only about 40,000 passengers in the same year. Airports that could support both 50-seat **and** 76-seat RJ service in 2012 enplaned about 95,500 passengers on average in the previous year.

Airports with above-average enplanement levels and only 50-seat RJ service might be good candidates for 76-seat regional jet service in the coming years. Table 3 summarizes some airports that have enplanement levels over the category average, but are served by only 50-seat regional jets.

Airport Code	Location	2011 Enplanements
AEX	Alexandria, LA	188,286
EVV	Evansville, IN	169,426
CWA	Mosinee, WI	135,965
LNK	Lincoln, NE	135,647
LSE	La Crosse, WI	102,958
BRO	Brownsville, TX	85,244
CMI	Savoy (Urbana-Champaign), IL	83,731
ABI	Abilene, TX	80,434

Table 3: Selected airports served only by 50-seat regional jets with above-average enplanements

Of course, enplanements are only one measure of the economic strength of a given airport, and other demographic and local economic considerations need to be taken into account before the correct gauge for the market can be computed. The variation in the types of airports served by only 50-seat regional jets highlights the challenges in selecting the correct aircraft for a given market.

A taxonomy of small-community airports: which airports may be at risk of future service loss?

Before examining which small community airports might be at risk of future service loss, it is first worthwhile to consider why a passenger would choose to fly out of a smaller airports instead of a large hub. Figure 9 summarizes some of the tradeoffs passengers face when choosing between departing from a small or large airport.

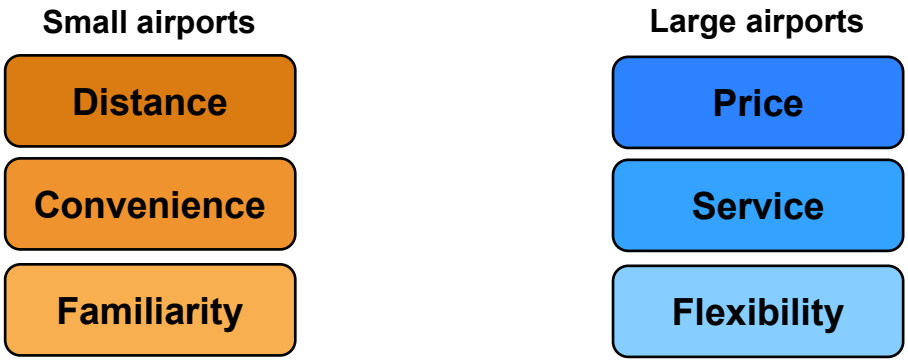

Figure 9: Advantages for passengers at small and large airports

Passengers who choose to fly from small airports often do so to take advantage of a sense of convenience: perhaps the smaller airport is closer to home, offers shorter security or check-in lines, or a smaller terminal footprint that is easier to navigate. Conversely, passengers who choose larger airports often do so because these airports have a larger range of flights and connections from which to choose, fares may be lower, and there may be more flexibility to reschedule itineraries during periods of delays, cancellations or other irregular operations. Passengers in multi-airport regions evaluate each of these factors when weighing which airport to use for departure, and airport managers often attempt to influence the choice through advertising touting their airport's ease of use (for smaller airports) or range of options and amenities (for larger airports).

Examining the scheduling data reveals that some small airports did a better job of conveying their benefits to potential travelers than did others. Some of those least successful airports had lost all network carrier service entirely by the end of 2012. These airports spanned the entire country and served communities of different sizes, as shown by the map in Figure 10. Just as we can divide airports into categories based on their size, levels of service, and amenities, so too can we categorize airports that lost all network carrier service into several groups. This taxonomy exercise aims to help other small airports identify if they may fit into one of the categories that have historically been at risk for total network carrier service loss.

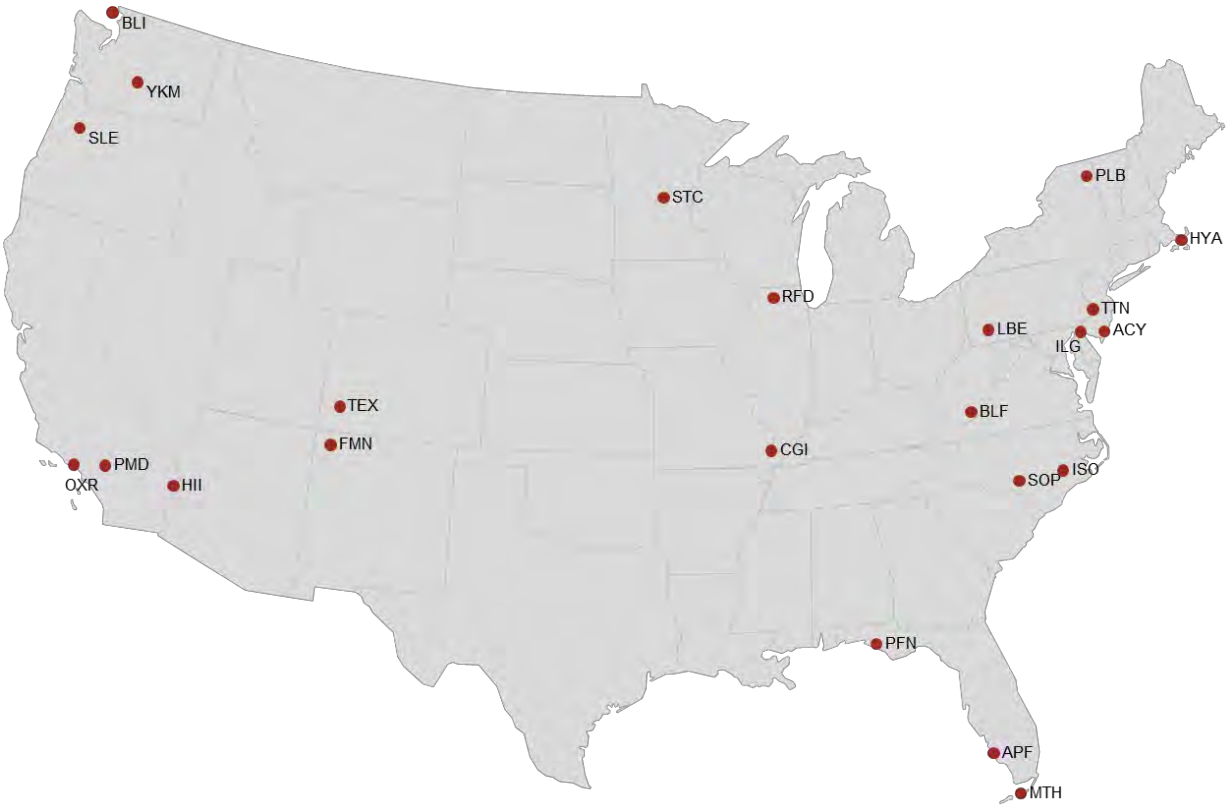

Figure 10: Airports that lost all network carrier service from 2007-2012

There are at least three categories into which the 24 airports that lost network carrier service from 2007-2012 can be classified:

1. ***Lack of local demand***

The most classic cause of network carrier service loss is simply a lack of local demand to support the service. These airports, such as Four Corners Regional Airport (FMN) in Farmington, NM, often have a limited population with low household income in their immediate catchment areas. The airports are generally located in rural areas that are a significant distance from the nearest hub airport, but the average network carrier fares at the smaller airports are often several hundred dollars higher than average fares at the nearest hub. While airports with little local demand often have significant general aviation activity, there are traditionally limited network airline operations—often, these airports had

been historically served by one or two network carrier flights per day before those carriers decided to exit. This group of airports is likely a good candidate for Essential Air Service support, as they are located far from other larger airports but lack the local demand to induce frequent network carrier service at reasonable prices.

2. Proximity to nearby hub

Some smaller airports may have lost their network carrier service due to their close proximity to other large or medium-hubs. This is particularly true for airports along the eastern and western seaboards, such as Trenton Mercer Airport (TTN) in Trenton, NJ. Even though airports like Trenton have large populations with high household incomes in their catchment areas, they are so close to large hub airports with significant service options that supporting limited network carrier frequencies can become difficult. For instance, Trenton is only 42.8 miles away from Philadelphia International Airport (PHL), a large-hub in Philadelphia, PA. Compared to this large hub, Trenton offered only limited options for nonstop service. However, due to their dense catchment areas, this group of airports still may have room to revive: Trenton itself recently inked a deal with Frontier Airlines to provide nonstop service to more than ten new destinations from Trenton Mercer Airport.

3. Presence of ULCCs

A third category of airports that lost all network carrier service can be identified by their presence of ultra-low cost carrier (ULCC) service. The timing of ULCC entry into these markets can vary—at some airports, ULCCs arrive before network carriers exit, while at other airports ULCCs move in to fill a void in commercial service. These airports with ULCC service generally have a moderate level of population and household income in their immediate catchment area, and are fairly close to other hub airports. There may be geographic advantages at these airports that can attract ULCC service—for instance, Bellingham International Airport (BLI) in Bellingham, WA, is located less than 50 miles from Vancouver International Airport across the Canadian border. This has allowed Allegiant Air to market Bellingham as an alternative gateway airport for Canada. In these markets, there is enough demand to stimulate infrequent ULCC service, but the network carriers are unable to compete in either volume or price.

Taking these characteristics into account, it is possible to form a general picture of smaller airports that may be at risk of losing all network carrier service in the near future. These “at-risk” airports likely have service by only one network carrier, and have seen one or more network carriers with significant frequency share recently exit the market. There may or may not be the presence of one or more LCCs or ULCCs providing frequency or price competition to the remaining network carrier service. These airports are also likely located in close geographic proximity to a major hub airport.

Toledo Express Airport (TOL) in Toledo, OH, is one example of an airport that fits this categorization and may be at risk for future loss of all network carrier air service. Toledo is located 50 miles from Detroit, MI, and after Delta acquired DTW as a hub following its merger with Northwest Airlines, the airline saw no reason to continue its historically frequent service to TOL. There were 6,317 scheduled network carrier departures out of TOL in 2007, of which 2,118 were Delta flights. Yet in 2012, there were only 1,345 scheduled network carrier departures out of TOL, all of which were American Airlines service to

Chicago O'Hare. Given its close proximity to DTW, Toledo may be at risk of losing this American Airlines service in the future despite the significant population size of the Toledo metropolitan area. Allegiant Air, perhaps smelling the blood in the water, has already entered TOL to provide service to three destinations in Florida and attempt to hasten American's exit.

Using the historical patterns of service described above, a full taxonomy of smaller airports in the United States can be created; it is shown in Figure 11. In this classification system, airports that fall in categories highlighted in red may be at risk of future commercial air service loss in the next five years, whereas those in categories highlighted in green may see growth in service as airlines switch to larger regional jets or as ULCCs and ultra-regional carriers like Cape Air, Great Lakes Airlines, and Silver Airlines begin to make a bigger impact in the small community air service market.

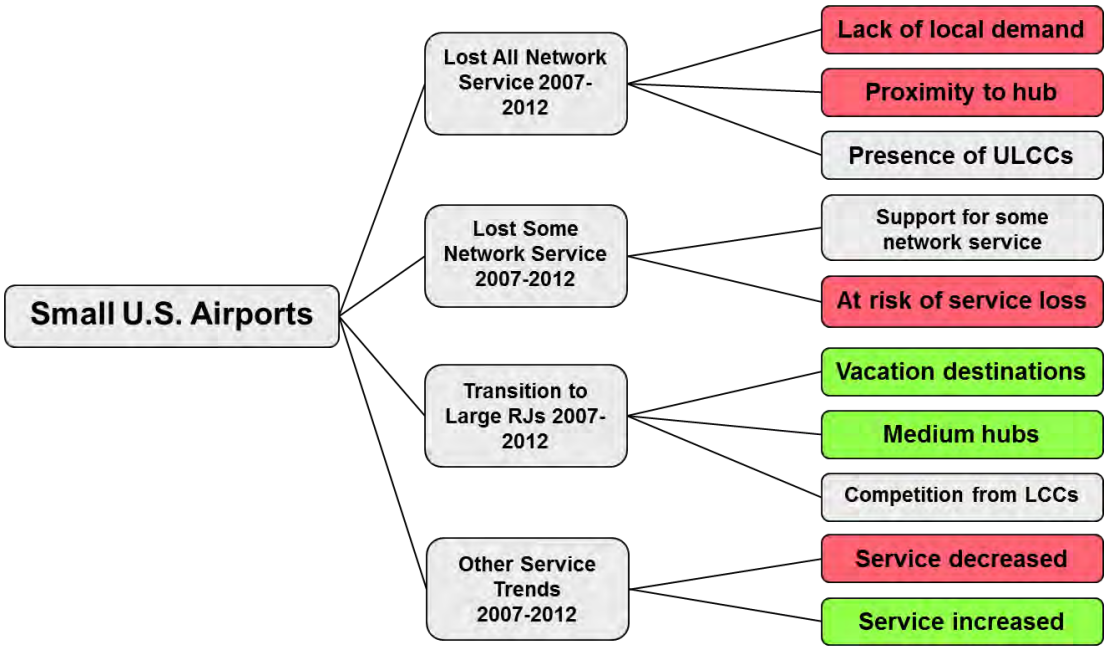

Figure 11: A taxonomy of small community airports in the U.S.

Despite a challenging economic climate and changing airline capacity strategies, it is still relatively rare for a small airport with commercial service to "go dark" completely for an extended period. The story of Arnold Palmer Regional Airport (LBE) in Latrobe, PA—at which network carrier US Airways exited the market only to be replaced by Spirit Airlines service—is likely to repeat itself dozens of times throughout the country in the coming years. The ultra-low cost carriers will be to the small-hub and non-hub airports in the next five years what Southwest Airlines was to the current medium-hub airports in the 1990s and early 2000s. Airports should take into account, however, that service provided by a low-cost carrier to a vacation destination does not offer the same level of connectivity to the global air transportation network that network carrier service to a large hub would provide.

At the end of the day, the airlines' individual route profitability will continue to decide which airports are served and which are not. Financial incentives may attract service for several months, but only economically viable routes will survive. Airlines have shown less patience for achieving route success at

small community airports in recent years; many case studies exist of an airline cutting all flights to a newly served airport after less than one year of trial service. Accurately judging the correct-sized airplane to service routes involving small communities will be critical to ensuring continued profitable commercial air transportation at these airports.

Legislative action will add additional uncertainty to the provision of small community air service.

As of early 2013, at least three legislative and regulatory hurdles present further threats to regional air service in the United States. A new federal rule requiring newly hired pilots at U.S. airlines to have at least 1,500 hours of flight time has caused some airlines and analysts to warn of an impending pilot shortage. Regional carriers may be disproportionally affected, as those regional pilots with enough flight time may begin migrating to larger network carriers as older pilots retire, leaving gaps that some regional carriers may find challenging to fill. The 1,500-hour rule will affect each regional carrier in a different way, and may give rise to a new round of consolidation as carriers with a shortage of pilots struggle to stay afloat.

Additionally, federal sequestration may affect the ability of small U.S. airports to provide manned control towers for commercial air service. In March 2013, the Federal Aviation Administration released a list of 149 small community airports at which air traffic control towers would be closed, and outgoing Transportation Secretary Ray LaHood has warned of disruptions in air service should sequestration cuts persist. While the full severity and duration of sequestration has yet to be felt, budget cuts should serve as an ongoing worry to small airports. There have been instances of airlines leaving airports due to deficient air traffic control facilities—in 2012, Allegiant Air cited the lack of a control tower as a primary reason for ceasing service at Fort Collins—Loveland Municipal Airport in Colorado, which the airline had served for nearly a decade.[5] Furthermore, for the many small airports currently without commercial air service at which control towers are set to close, the potential lack of ATC infrastructure may discourage commercial carriers from entering these markets at all. However, in April 2013 the FAA announced the closure of these towers would be delayed to address legal challenges from the affected small airports. The result of this legal and political battle on the nation's smallest airports remains to be seen.

Finally, potential changes to the structure or budget of the Essential Air Service program could cause many small communities to lose their EAS subsidies. In many cases, the loss of an EAS subsidy would result in the end of commercial service at a small airport. Airports with strong economic fundamentals to support service may continue to see air service provided by Cape Air, Great Lakes, Silver Airlines, or another ultra-regional carrier. Hence, EAS airports will need to pay careful attention to Washington in the coming months.

The effects of these exogenous legislative shocks on small community air service are difficult to predict. However, some of this proposed or existing legislature is likely to enhance losses in commercial aviation service at the nation's smallest airports. Combined with the recent consolidation attempt of major carriers US Airways and American Airlines, the future of small community air service is likely to look much different at the end of the decade than it does today.

[5] Hacker, Tom. 27 Oct 2012. "Allegiant Air quietly departs Loveland's airport for the last time." Denver Post.

Conclusions: What have we learned from capacity discipline?

Examining the trends in domestic service over last six years reveals a major shift in airline management strategy in the United States. The "capacity discipline" movement has evolved in response to a new profit-driven management focus, as airlines cut unprofitable and redundant flying and minimized the number of empty seats on each departing plane. Many of these cuts came at the expense of small airports, as most network carriers do not possess aircraft that are correctly sized to serve these markets.

It is possible that as the network carriers continue to consolidate—and as Southwest joins this group once it introduces international service following the complete integration of its AirTran assets—that the four largest remaining U.S. carriers will once again compete on the relative sizes of their networks. This is perhaps the best possible outcome for small community airports, since airlines will be racing to add new spokes to their hubs in order to offer their customers the most connectivity possible.

However, it is more likely that profitability-based metrics will continue to rule the day through the 2010s. In this scenario, small community airports may continue to struggle to receive network carrier service. Some carriers will signal their exits out of small communities by attempting to divest their regional jets. Other low-cost or ultra-regional carriers may move in to replace the network carrier service, but often at the expense of the small community's connectivity to the global air transportation network. As the earlier taxonomy of small community air service analysis suggests, smaller airports in multi-airport regions may be particularly at risk, as passengers will likely choose to drive to a nearby larger airport to save on airfare or take advantage of more connecting options.

What will be the future of small community air service if the current trends continue for the rest of the decade? Most likely, smaller airports will continue to go quiet, but not dark. Entrenched network carriers will likely not choose to exit many small markets *en masse* at the risk of losing that revenue to a nimbler competitor, although a regional jet pilot shortage as a result of current legislation would likely hasten the exit of network carriers from some small communities. Flight volumes at smaller airports will continue to stagnate, although the ULCCs could well take over operations at the airports that do indeed lose network carrier service. Levels of air service will likely continue to fall in many small markets, but passenger accessibility to air service across an entire multi-airport region may not be as adversely affected.

Some will argue that the reduction of service at small community airports is a welcome one—passengers in small communities are already showing their preference for larger airports, and consolidation of service at large hubs will create a leaner and more efficient air transportation network that is more likely to be profitable (yet also more likely to be congested). Others will argue that the reduction in service at smaller airports reflects a growing national shift of attention away from smaller communities and towards larger urban centers. The important debate about which communities "deserve" commercial air service will almost certainly intensify over the next several years, and its arguments will be made in airline boardrooms, in the halls of Congress, and over the check-in counters at smaller airports. The lessons and conclusions from this debate will continue to inform national aviation policy, particularly concerning the Essential Air Service program and the small communities it decides to subsidize.

Appendix A: Data Sources and Methodology

Classification of airports into airport hub types

The Federal Aviation Administration (FAA) regularly identifies which U.S. airports are designated as "primary commercial service" airports. Primary airports are those with at least 2,500 commercial enplanements per year.[6] As part of its National Plan of Integrated Airport Systems (NPIAS), the FAA also assigns a hub identifier to each of the primary airports in the United States. Airports are classified into four categories: large-, medium-, small-, and non-hub. Note that the FAA's use of the word "hub" merely suggests that the airport is an important node within the U.S. air transportation system, and does not imply that the airport is a connecting hub for a major U.S. carrier. For instance, the FAA classifies Indianapolis International Airport (IND) as a medium-hub airport, even though IND is not a connecting hub for any major U.S. carrier.

The division of airports into hub types is based on the previous year's enplanements at that airport as a percentage of the total number of enplanements in the United States:[7]

- **Large-hub** airports enplaned at least 1% of the U.S. total in the previous year (e.g. Hartsfield-Jackson Atlanta International Airport)
- **Medium-hub** airports enplaned between 0.25% and 1% of the U.S. total in the previous year (e.g. Indianapolis International Airport)
- **Small-hub** airports enplaned between 0.05% and 0.25% of the U.S. total in the previous year (e.g. Syracuse Hancock International Airport)
- **Non-hub** airports enplaned at least 10,000 passengers in the previous year, but no more than 0.05% of the U.S. total (e.g. Columbia (Mo.) Regional Airport)

Table 4 below shows how many airports were classified into each hub category as of February 1, 2013:

Hub Type	# of Airports
Large Hub	29
Medium Hub	35
Small Hub	74
Non-Hub	249

Table 4: U.S. airports by FAA Hub Type

Source: FAA Report to Congress: National Plan of Integrated Airport Systems (NPIAS) 2013-2017

Additionally, some airports that are too small to be labeled "non-hub" are also included in the analysis shown in this report due to their participation in the Essential Air Service (EAS) program, which provides federal subsidies to induce consistent air service for smaller U.S. communities. While some EAS airports are contained in the "non-hub" category, as many as 80 additional airports are too small to be assigned

[6] http://www.faa.gov/airports/planning_capacity/npias/reports/media/2009/npias_2009_narrative.pdf pg. 5
[7] http://www.faa.gov/airports/planning_capacity/passenger_allcargo_stats/categories/

a hub status. Regardless, these airports should still be included in any analysis of industry changes on smaller airports in the U.S., and are included in this report under an "EAS" category.

In all, 462 of the 499 primary commercial service airports in the United States are analyzed in this report.

Description of Data Sources

The data analyzed in this report is sourced from the Diio Mi Market Intelligence portal, which uses Innovata LLC's Schedule Reference Service (SRS) data product. Created in coordination with IATA, the Diio Mi schedule data covers the schedules of nearly every commercial airline in the world and is updated on a daily basis.[8]

To verify the accuracy and robustness of the Diio Mi data, spot checks were made with the FAA's Aviation System Performance Metrics (ASPM) data product. The ASPM schedule data are another industry-standard data set for measuring commercial air service performance, including schedules and operations. Spot checks resulted in very close similarity between the Diio Mi data and the ASPM schedule data, reconfirming the robustness of the data set used in this analysis.

The Diio Mi data includes the following information for each origin/destination (O/D) airport-pair on which there was commercial service from January 2007 – December 2012:

- Marketing airline
- Origin
- Destination
- Aircraft type
- Number of scheduled flights
- Number of scheduled seats
- Number of scheduled ASMs

Data was aggregated for full years (January through December) yearly from 2007-2012. Additionally, flights that were scheduled fewer than 12 times per year (i.e. less than once monthly) for each year of the study period were treated as extraneous and removed from the data set.

[8] http://www.innovata-llc.com/data/data.html

Appendix B: Summary of Scheduled Domestic Departures for Large Hub Airports

Notes: Tables show enplaned passengers (2011 data), as well as scheduled domestic departures, seats, and the number of airlines providing domestic service to each airport in 2007 and 2012. Departures, seats, and airline service data sourced from and Diio Mi. Enplaned passenger data sourced from the Federal Aviation Administration Passenger Boarding and All-Cargo Data for U.S. Airports. All hub definitions and Essential Air Service subsidy lists are current as of October, 2012.

Airport	Enplaned Pax (2011)	Departures (2007)	Departures (2012)	% Change Flights 07-12	Seats (2007)	Seats (2012)	% Change Seats 07-12	Airlines Serving (2007)	Airlines Serving (2012)
ATL : Hartsfield Intl	44,414,121	444,291	417,559	-6.0%	50,287,348	49,736,427	-1.1%	11	13
BOS : Logan International	14,180,730	162,228	143,526	-11.5%	16,298,928	15,579,589	-4.4%	13	15
BWI : Baltimore/Wash Intl	11,067,319	117,797	114,371	-2.9%	14,673,677	14,305,787	-2.5%	13	10
CLT : Charlotte-Douglas Intl	19,022,535	222,248	243,814	9.7%	20,750,436	23,350,859	12.5%	9	8
DCA : Washington National	9,053,004	135,446	137,761	1.7%	13,073,287	12,968,444	-0.8%	13	13
DEN : Denver Intl	25,667,499	284,769	286,387	0.6%	29,470,705	30,457,093	3.3%	16	12
DFW : Dallas/Ft Worth Intl	27,518,358	307,489	288,002	-6.3%	33,738,465	31,944,332	-5.3%	14	11
DTW : Wayne County	15,716,865	210,168	193,833	-7.8%	20,747,653	17,348,563	-16.4%	12	9
EWR : Newark Intl	16,814,092	163,463	148,082	-9.4%	16,634,634	14,871,343	-10.6%	14	10
FLL : Ft Lauderdale Intl	11,332,466	89,185	82,226	-7.8%	12,318,652	11,826,581	-4.0%	19	14
HNL : Honolulu Intl	8,689,699	86,377	65,684	-24.0%	10,537,077	8,468,474	-19.6%	14	12
IAD : Dulles International	11,044,383	138,590	111,537	-19.5%	12,135,458	9,677,101	-20.3%	12	11
IAH : Houston Intcntl	19,306,660	242,654	193,456	-20.3%	21,446,557	18,319,231	-14.6%	8	9
JFK : John F Kennedy Intl	23,664,832	148,383	120,595	-18.7%	16,686,357	14,912,986	-10.6%	11	8
LAS : Mccarran Intl	19,872,617	197,254	160,027	-18.9%	27,433,356	22,783,490	-16.9%	20	16
LAX : Los Angeles Intl	30,528,737	249,173	231,014	-7.3%	28,910,713	28,431,938	-1.7%	17	16
LGA : La Guardia	11,989,227	187,947	171,585	-8.7%	17,422,484	17,070,831	-2.0%	12	10
MCO : Orlando Intl	17,250,415	155,754	126,347	-18.9%	21,192,503	18,389,089	-13.2%	15	13
MDW : Midway	9,134,576	106,098	91,681	-13.6%	13,650,148	12,265,085	-10.1%	9	5
MIA : Miami International	18,342,158	80,157	81,031	1.1%	10,678,342	11,302,646	5.8%	9	9
MSP : Minneapolis-St Paul	15,895,653	194,875	182,125	-6.5%	20,795,015	18,345,264	-11.8%	12	12
ORD : O'Hare International	31,892,301	413,665	383,248	-7.4%	40,271,803	34,008,845	-15.6%	11	12
PHL : Philadelphia Intl	14,883,180	205,271	187,445	-8.7%	19,702,772	16,743,889	-15.0%	12	10
PHX : Sky Harbor Intl	19,750,306	216,095	185,855	-14.0%	27,269,622	23,541,485	-13.7%	17	13
SAN : Lindbergh Field	8,465,683	98,836	79,272	-19.8%	11,967,395	10,496,716	-12.3%	18	14
SEA : Seattle/Tacoma Intl	15,971,676	149,611	133,169	-11.0%	18,348,327	17,278,072	-5.8%	16	14
SFO : San Francisco Intl	20,056,568	142,733	172,568	20.9%	16,904,636	20,644,958	22.1%	17	13
SLC : Salt Lake City Intl	9,701,756	149,623	115,579	-22.8%	13,578,379	11,462,596	-15.6%	10	8
TPA : Tampa International	8,174,194	98,212	74,351	-24.3%	12,214,503	10,055,318	-17.7%	13	11
Grand Total (Large Hubs)	**509,401,610**	**5,398,392**	**4,922,130**	**-8.8%**	**589,139,232**	**546,587,032**	**-7.2%**		

Appendix C: Summary of Scheduled Domestic Departures for Medium Hub Airports

Airport	Enplaned Pax (2011)	Departures (2007)	Departures (2012)	% Change Flights 07-12	Seats (2007)	Seats (2012)	% Change Seats 07-12	Airlines Serving (2007)	Airlines Serving (2012)
ABQ : Albuquerque Intl	2,768,435	46,537	34,485	-25.9%	5,081,427	3,758,909	-26.0%	13	9
ANC : Anchorage Intl	2,354,987	47,575	42,019	-11.7%	3,450,620	3,017,946	-12.5%	17	13
AUS : Austin-Bergstrom Inl	4,436,661	54,166	48,434	-10.6%	6,022,981	5,850,877	-2.9%	12	11
BDL : Bradley Intl	2,772,315	42,327	32,146	-24.1%	4,298,267	3,265,741	-24.0%	10	7
BNA : Nashville Metro	4,673,047	70,179	64,468	-8.1%	7,222,872	6,483,858	-10.2%	10	10
BUF : Buffalo Niagara Intl	2,582,597	38,413	34,990	-8.9%	3,412,122	3,245,218	-4.9%	9	8
BUR : Hollywood-Burbank	2,144,915	34,515	25,963	-24.8%	4,244,063	3,065,944	-27.8%	9	7
CLE : Hopkins Intl	4,401,033	107,290	79,574	-25.8%	7,403,008	5,657,777	-23.6%	10	7
CMH : Port Columbus Intl	3,134,379	60,179	47,405	-21.2%	4,891,636	4,022,695	-17.8%	11	8
CVG : Cincinnati/N. Kentucky	3,422,466	151,468	53,970	-64.4%	9,995,079	3,827,317	-61.7%	7	6
DAL : Love Field	3,852,886	54,699	47,294	-13.5%	6,397,491	5,977,576	-6.6%	3	5
HOU : William P Hobby	4,753,554	57,341	56,103	-2.2%	7,272,168	7,230,445	-0.6%	7	6
IND : Indianapolis Intl	3,670,396	62,539	49,641	-20.6%	5,507,863	4,491,335	-18.5%	12	9
JAX : Jacksonville Intl	2,700,514	41,619	30,863	-25.8%	4,298,600	3,349,524	-22.1%	11	8
MCI : Kansas City Intl	5,011,000	87,976	61,421	-30.2%	8,558,752	6,455,148	-24.6%	15	10
MEM : Memphis Intl	4,344,213	98,097	58,263	-40.6%	7,410,526	4,318,545	-41.7%	9	7
MKE : General Mitchell Fld	4,671,976	76,321	48,171	-36.9%	5,197,456	4,758,447	-8.4%	10	9
MSY : New Orleans Intl	4,255,411	41,843	43,723	4.5%	4,967,995	5,438,543	9.5%	10	9
OAK : Metro Oakland Intl	4,550,526	77,765	49,283	-36.6%	10,292,122	6,604,446	-35.8%	12	9
OGG : Kahului	2,683,933	37,215	36,590	-1.7%	3,930,735	3,446,227	-12.3%	13	12
OMA : Eppley Airfield	2,047,055	33,186	27,007	-18.6%	2,907,505	2,498,381	-14.1%	11	7
ONT : Ontario Intl	2,271,458	43,735	22,290	-49.0%	4,952,196	2,801,324	-43.4%	11	7
PBI : Palm Beach Intl	2,877,158	32,106	24,174	-24.7%	4,306,716	3,400,592	-21.0%	12	10
PDX : Portland Intl	6,808,486	92,391	77,887	-15.7%	9,336,523	8,452,893	-9.5%	14	13
PIT : Pittsburgh Intl	4,070,614	85,613	51,627	-39.7%	6,683,702	4,824,219	-27.8%	12	10
PVD : T Francis Green St	1,920,699	36,583	22,832	-37.6%	3,431,366	2,206,740	-35.7%	9	7
RDU : Raleigh-Durham	4,462,508	80,351	61,658	-23.3%	6,800,283	5,708,550	-16.1%	12	8
RNO : Reno/Tahoe Intl	1,821,051	29,899	20,532	-31.3%	3,625,292	2,353,960	-35.1%	12	7
RSW : Southwest Florida	3,748,366	37,208	31,465	-15.4%	4,814,588	4,192,434	-12.9%	14	13
SAT : San Antonio Intl	3,992,304	48,322	41,740	-13.6%	5,496,153	4,928,902	-10.3%	11	9
SJC : San Jose Municipal	4,108,006	63,551	42,471	-33.2%	7,477,783	5,421,168	-27.5%	12	9
SJU : Luis Munoz Marin Int	3,983,130	44,319	42,870	-3.3%	5,435,365	4,367,379	-19.6%	11	13
SMF : Sacramento Intl	4,370,895	60,860	46,131	-24.2%	7,307,364	5,575,029	-23.7%	14	10
SNA : John Wayne Airport	4,247,802	52,906	40,384	-23.7%	6,783,496	5,429,952	-20.0%	11	9
STL : Lambert International	6,159,090	114,870	83,605	-27.2%	10,489,590	8,365,199	-20.3%	13	13
Grand Total (Medium Hubs)	**130,073,866**	**2,143,964**	**1,581,479**	**-26.2%**	**209,703,705**	**164,793,240**	**-21.4%**		

Appendix D: Summary of Scheduled Domestic Departures for Small Hub Airports

Airport	Enplaned Pax (2011)	Departures (2007)	Departures (2012)	% Change Flights 07-12	Seats (2007)	Seats (2012)	% Change Seats 07-12	Airlines Serving (2007)	Airlines Serving (2012)
ABE : Allentown/Bethlehem	428,332	10,933	8,150	-25.5%	574,881	471,032	-18.1%	6	7
ACY : Atlantic City Intl	668,930	4,616	4,406	-4.5%	603,996	739,896	22.5%	2	2
ALB : Albany County	1,216,626	26,123	21,522	-17.6%	1,940,952	1,574,799	-18.9%	7	6
AMA : Amarillo Intl	392,815	9,061	7,370	-18.7%	749,778	617,191	-17.7%	4	4
AZA : Williams Gateway Airport	521,437	209	4,883	2236.4%	31,350	748,112	2286.3%	1	3
BGR : Bangor International	391,597	6,431	4,431	-31.1%	283,802	292,197	3.0%	6	3
BHM : Birmingham Municipal	1,429,282	27,052	22,248	-17.8%	2,491,566	2,122,541	-14.8%	8	6
BIL : Logan Intl	407,375	10,718	9,146	-14.7%	612,535	556,727	-9.1%	7	6
BLI : Bellingham Muni	515,402	4,134	4,976	20.4%	284,925	592,569	108.0%	5	3
BOI : Boise Air Term/Gowen	1,395,554	29,062	17,476	-39.9%	2,503,566	1,656,923	-33.8%	11	8
BTR : Ryan	396,403	12,040	9,817	-18.5%	648,524	494,935	-23.7%	5	5
BTV : Burlington Intl	636,019	15,380	11,625	-24.4%	956,568	784,852	-18.0%	6	5
BZN : Gallatin Field	397,870	7,132	6,509	-8.7%	495,678	514,393	3.8%	5	5
CAE : Columbia Metropolitan	487,474	16,569	11,977	-27.7%	891,579	684,202	-23.3%	7	5
CAK : Akron/Canton Regional	814,243	12,962	12,426	-4.1%	981,218	1,135,876	15.8%	6	6
CHS : Charleston Afb Muni	1,247,459	21,643	20,802	-3.9%	1,573,567	1,675,211	6.5%	7	6
CID : The Eastern Iowa Airport	431,874	13,983	11,601	-17.0%	776,007	649,457	-16.3%	5	6
COS : Peterson Field	828,516	17,951	13,657	-23.9%	1,277,561	1,098,868	-14.0%	10	6
DAY : Dayton International	1,247,333	28,094	22,054	-21.5%	1,893,073	1,649,363	-12.9%	9	8
DSM : Des Moines Airport	932,828	22,279	17,436	-21.7%	1,303,099	1,255,307	-3.7%	9	9
ECP : Northwest FL Beaches Intl	417,902	-	5,784	N/A	-	641,417	N/A	0	2
ELP : El Paso Intl	1,458,965	23,142	20,667	-10.7%	2,751,354	2,259,125	-17.9%	9	6
EUG : Eugene, Oregon-Airport	393,504	10,007	7,995	-20.1%	514,432	495,382	-3.7%	6	6
FAI : Fairbanks Intl	438,188	15,061	14,792	-1.8%	805,638	759,657	-5.7%	10	8
FAT : Fresno Yosemite Intl	615,320	17,070	12,780	-25.1%	878,888	730,189	-16.9%	9	6
FNT : Bishop	473,113	10,367	6,830	-34.1%	746,604	531,225	-28.8%	6	6
FSD : Joe Foss Field	423,288	7,664	7,963	3.9%	541,145	542,870	0.3%	4	5
GEG : Spokane Intl	1,487,913	24,097	17,713	-26.5%	2,345,356	1,869,280	-20.3%	9	7
GPT : Gulfport Biloxi Intl	395,350	8,330	6,287	-24.5%	588,088	412,286	-29.9%	7	6
GRR : Gerald R. Ford Intl	1,126,552	19,742	18,032	-8.7%	1,306,704	1,339,647	2.5%	6	7
GSO : Piedmont Triad Intl	894,290	25,739	18,645	-27.6%	1,530,157	1,203,367	-21.4%	8	7
GSP : Greenville/Spartanbg	880,994	20,892	17,858	-14.5%	1,159,578	1,276,004	10.0%	7	7
GUM : Agana Field	1,369,586	3,235	3,090	-4.5%	212,974	213,888	0.4%	2	3
HPN : Westchester County	972,385	20,368	17,848	-12.4%	1,298,124	1,149,228	-11.5%	8	7
HSV : Madison County	614,601	14,324	11,811	-17.5%	857,218	842,999	-1.7%	7	6
ICT : Mid-Continent	740,675	16,366	12,107	-26.0%	1,169,547	961,353	-17.8%	10	7
ILM : New Hanover County	395,156	7,458	7,665	2.8%	493,382	484,172	-1.9%	2	4
ISP : Long Island Macarthur	781,396	14,784	7,930	-46.4%	1,709,776	905,490	-47.0%	3	2

Airport	Enplaned Pax (2011)	Departures (2007)	Departures (2012)	% Change Flights 07-12	Seats (2007)	Seats (2012)	% Change Seats 07-12	Airlines Serving (2007)	Airlines Serving (2012)
ITO : Hilo International	605,251	11,605	7,270	-37.4%	1,121,223	841,012	-25.0%	7	4
JAN : Allen C Thompson Fld	615,622	14,628	11,717	-19.9%	1,089,749	855,207	-21.5%	6	6
KOA : Keahole	1,295,389	20,666	19,086	-7.6%	2,113,645	1,719,327	-18.7%	13	10
LBB : Lubbock Intl	503,580	9,554	7,935	-16.9%	876,667	665,976	-24.0%	3	5
LEX : Blue Grass	533,952	14,348	11,692	-18.5%	722,070	690,657	-4.4%	6	7
LGB : Long Beach Municipal	1,512,212	14,215	14,397	1.3%	1,831,317	1,852,260	1.1%	6	4
LIH : Lihue	1,203,525	16,695	14,576	-12.7%	1,930,151	1,649,540	-14.5%	10	8
LIT : Adams Field	1,063,673	22,670	18,210	-19.7%	1,779,366	1,573,724	-11.6%	8	7
MAF : Midland-Odessa Regl	474,423	8,576	8,162	-4.8%	781,564	688,980	-11.8%	4	4
MDT : Olmsted State	655,294	16,457	15,367	-6.6%	864,857	845,000	-2.3%	6	8
MHT : Manchester Boston	1,342,308	27,769	16,320	-41.2%	2,664,770	1,464,474	-45.0%	6	5
MLI : Quad-City	412,470	11,363	9,158	-19.4%	666,576	527,045	-20.9%	5	5
MSN : Truax Field	741,365	17,845	14,110	-20.9%	1,114,145	947,324	-15.0%	6	5
MYR : Myrtle Beach Afb	848,230	10,822	9,236	-14.7%	1,044,309	948,383	-9.2%	7	8
OKC : Will Rogers World	1,738,438	30,346	25,921	-14.6%	2,578,222	2,463,642	-4.4%	10	6
ORF : Norfolk Intl	1,606,695	33,949	27,479	-19.1%	2,606,281	2,264,945	-13.1%	7	6
PHF : Newport News/Wmsburg	516,789	10,372	7,246	-30.1%	837,548	454,871	-45.7%	3	5
PIE : St. Petersburg Intl	417,223	3,103	3,061	-1.4%	490,418	460,526	-6.1%	4	2
PNS : Pensacola Regional	750,190	15,546	12,995	-16.4%	1,087,555	936,076	-13.9%	6	6
PSP : Palm Springs Muni	759,510	14,080	12,488	-11.3%	1,010,744	924,573	-8.5%	10	10
PWM : Portland Intl Jetprt	833,005	16,651	13,559	-18.6%	1,082,714	1,003,354	-7.3%	7	6
RIC : Richard E Byrd Field	1,571,155	33,897	27,129	-20.0%	2,464,524	2,042,239	-17.1%	9	7
ROC : Monroe County	1,190,967	27,571	21,829	-20.8%	1,975,764	1,576,028	-20.2%	8	7
SAV : Savannah Intl	785,251	16,406	13,344	-18.7%	1,359,037	1,041,695	-23.4%	7	5
SBA : Santa Barbara Muni	367,328	14,989	11,177	-25.4%	604,652	475,422	-21.4%	7	5
SDF : Standiford Field	1,650,707	35,162	27,132	-22.8%	2,655,841	2,185,688	-17.7%	10	8
SFB : Central Florida Region	768,938	3,270	4,866	48.8%	490,500	744,094	51.7%	1	2
SPN : Saipan International	382,386	7,600	7,473	-1.7%	159,176	151,626	-4.7%	2	3
SRQ : Sarasota-Bradenton	657,157	9,617	5,973	-37.9%	986,412	748,575	-24.1%	8	5
STT : Cyril E. King Airport	596,832	14,799	13,405	-9.4%	856,095	783,903	-8.4%	10	10
SYR : Clarence E Hancock	982,709	24,915	19,469	-21.9%	1,596,398	1,267,327	-20.6%	7	6
TUL : Tulsa International	1,346,122	28,419	20,909	-26.4%	2,453,761	1,967,505	-19.8%	8	5
TUS : Tucson International	1,779,679	28,211	21,007	-25.5%	2,849,906	2,184,186	-23.4%	13	8
TYS : Mc Ghee Tyson	841,237	22,622	18,273	-19.2%	1,283,293	1,066,544	-16.9%	7	8
VPS : Ft. Walton Beach Airport	434,455	8,412	8,074	-4.0%	526,568	478,988	-9.0%	4	6
XNA : Northwest Arkansas	538,850	16,723	14,412	-13.8%	959,012	812,264	-15.3%	6	6
Grand Total (Small Hubs)	**60,989,464**	**1,188,891**	**972,766**	**-18.2%**	**89,298,020**	**77,235,010**	**-13.5%**		

Appendix E: Summary of Scheduled Domestic Departures for Non Hub Airports

Airport	Enplaned Pax (2011)	Departures (2007)	Departures (2012)	% Change Flights 07-12	Seats (2007)	Seats (2012)	% Change Seats 07-12	Airlines Serving (2007)	Airlines Serving (2012)
ABI : Abilene Regional Airport	80,434	3,644	2,439	-33.1%	142,854	106,087	-25.7%	3	1
ABY : Dougherty County	33,627	1,312	999	-23.9%	55,670	49,950	-10.3%	1	1
ACK : Nantucket Memorial	169,352	20,986	17,482	-16.7%	247,120	213,817	-13.5%	6	6
ACT : Waco Municipal	61,164	3,612	2,221	-38.5%	113,408	102,475	-9.6%	2	3
ACV : Arcata	70,455	4,945	3,691	-25.4%	195,844	107,314	-45.2%	2	2
ADQ : Kodiak Airport	81,149	4,027	6,310	56.7%	173,163	165,658	-4.3%	4	4
AEX : Alexandria Intl Airport	188,286	5,387	4,192	-22.2%	213,140	190,038	-10.8%	4	4
AGS : Bush Field	267,631	4,369	5,762	31.9%	211,363	322,009	52.3%	2	3
AKN : King Salmon	40,345	4,312	6,061	40.6%	75,764	89,015	17.5%	3	3
ALW : Walla Walla	32,139	1,114	655	-41.2%	39,814	49,780	25.0%	2	1
ANI : Aniak	16,217	4,334	2,925	-32.5%	57,460	43,188	-24.8%	4	2
ASE : Aspen	221,256	5,311	5,195	-2.2%	297,229	345,526	16.2%	4	3
ATW : Outagamie County	242,346	9,597	5,415	-43.6%	422,244	311,178	-26.3%	4	3
AVL : Asheville Municipal	361,617	8,129	7,842	-3.5%	396,076	421,357	6.4%	4	6
AVP : Wilkes-Barre/Scranton	228,367	6,714	6,586	-1.9%	301,213	317,582	5.4%	5	5
AZO : Battle Creek Intl	148,634	6,382	3,960	-38.0%	323,169	196,623	-39.2%	4	3
BED : Hanscom Field	10,893	1,801	168	-90.7%	34,219	5,040	-85.3%	1	1
BET : Bethel	152,366	7,802	23,409	200.0%	154,783	330,579	113.6%	7	4
BFI : Boeing Field Intl	34,434	6,654	2,667	-59.9%	70,466	26,579	-62.3%	2	2
BFL : Meadows Field	148,347	5,183	3,771	-27.2%	233,826	179,018	-23.4%	6	2
BGM : Link Field/Broome Co	108,172	4,586	3,680	-19.8%	190,605	150,067	-21.3%	4	3
BID : Block Island	10,164	2,608	3,108	19.2%	23,472	27,972	19.2%	1	1
BIS : Bismarck Municipal	197,181	3,498	4,348	24.3%	272,721	288,956	6.0%	3	5
BLD : Boulder City	190,716	883	472	-46.5%	8,830	4,275	-51.6%	1	2
BMI : Bloomington/Normal	284,852	6,132	4,574	-25.4%	384,430	299,892	-22.0%	5	5
BPT : Jefferson County	13,670	1,698	680	-60.0%	62,399	23,120	-62.9%	1	2
BQK : Glynco Jetport	31,655	995	955	-4.0%	42,980	47,750	11.1%	1	1
BQN : Borinquen	230,556	1,630	1,681	3.1%	245,581	259,335	5.6%	4	4
BRO : South Padre Isl Intl	85,244	2,347	2,328	-0.8%	113,437	116,400	2.6%	1	3
BRW : Barrow Wbas	41,083	2,869	3,269	13.9%	105,139	105,435	0.3%	3	2
BTM : Silver Bow County	24,806	1,549	703	-54.6%	95,218	35,150	-63.1%	2	1
CDV : Mile 13 Field	17,731	1,148	1,124	-2.1%	97,766	86,044	-12.0%	2	2
CHA : Lovell Field	304,399	8,418	7,760	-7.8%	425,662	414,819	-2.5%	6	4
CHO : Albemarle	216,957	8,143	7,291	-10.5%	318,681	315,382	-1.0%	4	4
CIC : Chico Muni	20,881	1,375	1,287	-6.4%	41,250	38,610	-6.4%	1	1
CLD : McClellan-Palomar	45,518	2,727	2,370	-13.1%	84,631	71,100	-16.0%	3	1
CLL : Easterwood Field	71,555	4,040	2,819	-30.2%	135,712	124,409	-8.3%	2	3
CLM : William R Fairchild	8,242	3,187	1,088	-65.9%	33,569	10,929	-67.4%	2	1

Airport	Enplaned Pax (2011)	Departures (2007)	Departures (2012)	% Change Flights 07-12	Seats (2007)	Seats (2012)	% Change Seats 07-12	Airlines Serving (2007)	Airlines Serving (2012)
CMI : Willard University	83,731	3,520	2,278	-35.3%	166,382	110,060	-33.9%	3	1
COU : Columbia Regional	40,990	1,252	924	-26.2%	23,788	46,200	94.2%	1	1
CPR : Casper	77,758	3,893	2,304	-40.8%	132,495	117,028	-11.7%	3	3
CRP : Corpus Christi Intl	322,903	9,122	7,246	-20.6%	609,479	494,183	-18.9%	5	4
CRW : Yeager	282,704	10,983	8,049	-26.7%	438,773	383,663	-12.6%	5	7
CSG : Columbus Airport	78,718	1,401	2,115	51.0%	79,046	97,686	23.6%	1	2
CWA : Central Wisconsin	135,965	5,568	3,487	-37.4%	220,121	173,138	-21.3%	3	3
CYS : Cheyenne Municipal	25,112	2,440	1,972	-19.2%	50,364	39,815	-20.9%	1	2
DAB : Daytona Beach Regl	274,166	3,699	2,762	-25.3%	412,071	322,951	-21.6%	4	2
DBQ : Dubuque Municipal	36,148	1,415	1,017	-28.1%	67,684	44,748	-33.9%	1	1
DHN : Dothan	46,388	1,639	1,354	-17.4%	79,424	67,700	-14.8%	1	1
DLG : Dillingham Muni	30,406	4,547	2,573	-43.4%	76,159	58,270	-23.5%	5	3
DLH : Duluth International	146,620	3,636	3,592	-1.2%	264,565	207,322	-21.6%	3	3
DRO : La Plata	175,649	3,936	4,036	2.5%	166,475	247,675	48.8%	4	5
DRT : Del Rio Intl	8,438	983	700	-28.8%	33,422	29,752	-11.0%	1	2
DUT : Emergency Field	30,048	2,512	995	-60.4%	58,342	10,695	-81.7%	2	2
EAT : Pangborn Field	50,927	1,632	1,631	-0.1%	60,384	84,614	40.1%	1	2
EGE : Eagle County Regl	189,276	3,353	2,150	-35.9%	364,955	287,968	-21.1%	6	4
EKO : Elko Municipal	23,543	1,821	1,000	-45.1%	54,630	30,000	-45.1%	1	1
ELM : Celmira/Corning Regl	152,582	4,080	3,848	-5.7%	165,704	213,439	28.8%	4	3
ENA : Kenai Municipal	90,806	7,878	9,220	17.0%	166,383	174,104	4.6%	2	2
ERI : Erie Intl	112,749	5,397	3,510	-35.0%	212,586	149,253	-29.8%	4	4
EVV : Dress Regional	169,426	7,757	4,710	-39.3%	356,414	231,568	-35.0%	4	2
EWB : New Bedford Muni	11,152	2,026	2,618	29.2%	18,234	23,562	29.2%	1	1
EWN : Simmons Nott	124,085	3,202	3,547	10.8%	159,474	174,396	9.4%	2	2
EYW : Key West Intl	335,603	12,901	9,273	-28.1%	433,492	486,341	12.2%	6	8
FAR : Hector Field	346,459	6,006	6,911	15.1%	424,004	475,729	12.2%	4	5
FAY : Fayetteville Muni	259,445	4,958	6,161	24.3%	255,480	334,649	31.0%	3	3
FBS : Friday Harbor SPB	N/A	1,696	1,156	-31.8%	10,176	6,936	-31.8%	1	1
FCA : Glacier Natl Park	179,064	4,408	3,301	-25.1%	286,348	233,215	-18.6%	4	4
FLG : Pulliam Field	60,831	1,896	2,260	19.2%	70,152	98,531	40.5%	2	1
FLO : Florence Municipal	68,169	2,321	2,071	-10.8%	91,591	93,254	1.8%	2	1
FMN : Farmington Municipal	16,322	3,058	2,305	-24.6%	58,102	43,795	-24.6%	4	1
FNL : Ft Collins/Loveland Mu	44,999	223	227	1.8%	33,450	34,050	1.8%	1	1
FOE : Forbes Afb	7,015	64	-	-100.0%	9,600	-	-100.0%	1	0
FRD : Friday Harbor	11,283	2,270	1,040	-54.2%	22,986	10,400	-54.8%	2	1
FSM : Fort Smith Municipal	84,136	3,502	2,431	-30.6%	157,002	119,873	-23.6%	3	2
FWA : Ft Wayne Muni/Baer	272,796	9,840	6,573	-33.2%	459,549	359,244	-21.8%	6	4
GAL : Galena	10,862	2,953	2,975	0.7%	41,942	35,408	-15.6%	4	3
GCC : Campbell County	32,846	1,664	2,126	27.8%	46,213	62,229	34.7%	1	3
GCN : Grand Canyon Natl Park	331,924	976	155	-84.1%	9,760	1,865	-80.9%	1	1

Airport	Enplaned Pax (2011)	Departures (2007)	Departures (2012)	% Change Flights 07-12	Seats (2007)	Seats (2012)	% Change Seats 07-12	Airlines Serving (2007)	Airlines Serving (2012)
GCW : Grand Canyon West	71,316	-	472	N/A	-	4,275	N/A	1	2
GFK : Grand Forks Intl	118,872	1,926	2,552	32.5%	145,584	169,202	16.2%	1	3
GGG : Gregg County	21,112	1,094	680	-37.8%	32,820	33,154	1.0%	1	1
GJT : Walker Field	217,988	5,998	5,275	-12.1%	238,008	280,503	17.9%	6	6
GNV : J R Alison Municipal	177,282	4,499	5,311	18.0%	214,129	247,137	15.4%	3	5
GRB : Austin-Straubel Fld	352,157	10,437	7,132	-31.7%	659,263	401,970	-39.0%	6	4
GRK : Gray Aaf	219,753	6,707	5,545	-17.3%	301,433	279,993	-7.1%	4	4
GST : Gustavus	11,537	1,643	1,828	11.3%	20,572	26,126	27.0%	4	2
GTF : Great Falls Intl	168,158	4,099	3,788	-7.6%	291,102	269,829	-7.3%	5	5
GTR : Golden Triangle Regl	35,860	1,008	1,007	-0.1%	42,720	50,350	17.9%	1	1
GUC : Gunnison County	36,516	1,273	601	-52.8%	70,918	47,841	-32.5%	2	3
HDN : Yampa Valley	106,534	2,684	1,789	-33.3%	204,975	163,775	-20.1%	5	5
HHH : Hilton Head	61,006	3,733	2,665	-28.6%	167,063	98,618	-41.0%	2	1
HLN : Helena	100,695	3,350	2,713	-19.0%	159,941	159,587	-0.2%	4	4
HNH : Hoonah	10,815	2,689	1,956	-27.3%	16,523	17,292	4.7%	2	1
HOM : Homer Municipal	35,863	3,823	3,265	-14.6%	65,292	59,696	-8.6%	3	3
HRL : Valley International	359,166	6,017	4,386	-27.1%	645,403	461,640	-28.5%	3	4
HTS : Tri-State/Milton	112,522	2,187	2,072	-5.3%	99,232	139,531	40.6%	3	3
HVN : Tweed-New Haven	40,074	2,286	1,376	-39.8%	74,031	52,485	-29.1%	2	1
HYA : Barnstable Municipal	100,596	15,031	11,654	-22.5%	149,579	108,911	-27.2%	3	2
IAG : Niagara Falls Intl	98,982	6	586	9666.7%	870	90,184	10266.0%	1	3
IDA : Fanning Field	149,315	4,581	3,456	-24.6%	243,980	215,890	-11.5%	5	3
IFP : Laughlin Bullhead Intl	113,280	240	1	-99.6%	38,352	162	-99.6%	2	1
IPT : Lycoming County	24,508	1,735	1,040	-40.1%	67,536	38,480	-43.0%	1	1
ISN : Sloulin Field Intl	28,202	911	2,031	122.9%	27,330	66,110	141.9%	1	3
ITH : Tompkins County	121,733	3,996	3,815	-4.5%	152,567	163,944	7.5%	2	4
JAC : Jackson Hole	279,065	3,597	3,243	-9.8%	380,705	359,212	-5.6%	5	4
JNU : Juneau Intl	355,499	14,871	11,073	-25.5%	676,883	611,864	-9.6%	5	3
KSM : Saint Marys	12,415	1,741	1,694	-2.7%	20,553	26,183	27.4%	3	1
KTN : Ketchikan Intl	102,086	9,644	11,208	16.2%	380,420	467,842	23.0%	4	4
LAN : Capital City	186,341	5,345	4,479	-16.2%	371,961	295,291	-20.6%	4	4
LAW : Lawton Municipal	63,909	2,338	1,875	-19.8%	72,394	85,721	18.4%	1	1
LBE : Westmoreland County	36,971	727	587	-19.3%	24,718	92,672	274.9%	1	1
LCH : Lake Charles Muni	61,325	2,056	2,370	15.3%	77,364	100,826	30.3%	1	3
LFT : Lafayette Regional	222,795	6,965	6,164	-11.5%	295,501	307,792	4.2%	4	5
LMT : Klamath Falls Airport	15,856	1,150	823	-28.4%	42,550	24,690	-42.0%	1	1
LNK : Lincoln Municipal	135,647	4,386	3,295	-24.9%	235,412	164,750	-30.0%	3	2
LNY : Lanai City	43,596	3,453	2,937	-14.9%	100,638	78,697	-21.8%	3	2
LRD : Laredo Intl	101,780	3,019	2,600	-13.9%	154,027	144,176	-6.4%	3	4
LSE : La Crosse Municipal	102,958	3,489	2,964	-15.0%	197,051	139,176	-29.4%	2	2
LWS : Nez Perce County	62,845	2,963	1,672	-43.6%	118,809	109,782	-7.6%	2	2

Airport	Enplaned Pax (2011)	Departures (2007)	Departures (2012)	% Change Flights 07-12	Seats (2007)	Seats (2012)	% Change Seats 07-12	Airlines Serving (2007)	Airlines Serving (2012)
LYH : Preston-Glenn Field	73,821	2,352	2,081	-11.5%	102,383	102,646	0.3%	2	1
MBS : Tri City	136,594	3,845	3,572	-7.1%	276,522	187,496	-32.2%	2	3
MFE : Miller International	332,706	5,501	4,350	-20.9%	545,894	423,286	-22.5%	4	5
MFR : Jackson County	301,742	10,354	6,355	-38.6%	465,426	380,676	-18.2%	6	4
MGM : Dannelly Field	188,177	5,227	5,179	-0.9%	274,328	260,360	-5.1%	4	3
MHK : Manhattan Municipal	58,672	1,333	1,763	32.3%	25,327	85,588	237.9%	1	1
MKK : Molokai	82,136	9,236	8,621	-6.7%	171,200	141,036	-17.6%	3	3
MLB : Cape Kennedy	207,829	2,062	2,449	18.8%	197,756	257,075	30.0%	2	2
MLU : Monroe Municipal	107,290	5,152	3,358	-34.8%	191,287	162,845	-14.9%	4	4
MMH : Mammoth Yosemite	26,201	-	686	N/A	-	50,396	N/A	0	2
MOB : Mobile Municipal	288,461	7,830	6,780	-13.4%	435,847	388,978	-10.8%	5	5
MOD : Modesto Municipal	18,683	3,060	1,299	-57.5%	91,800	38,970	-57.5%	1	1
MOT : Minot International	151,424	1,083	3,986	268.1%	112,525	274,667	144.1%	1	4
MQT : Marquette County	52,326	3,593	978	-72.8%	128,741	48,900	-62.0%	3	2
MRY : Monterey Peninsula	181,640	8,750	6,147	-29.7%	334,741	277,677	-17.0%	6	6
MSO : Johnson-Bell Field	292,501	7,098	5,136	-27.6%	408,509	358,950	-12.1%	6	4
MTJ : Montrose County	87,228	2,594	1,710	-34.1%	119,807	100,170	-16.4%	4	4
MVY : Marthas Vineyard	49,095	6,685	6,864	2.7%	78,246	81,734	4.5%	2	4
OAJ : Albert J Ellis	170,118	4,016	4,675	16.4%	205,097	249,317	21.6%	2	2
OME : Nome	58,892	7,914	9,075	14.7%	185,702	183,795	-1.0%	5	3
OTH : North Bend Municipal	22,066	1,367	1,711	25.2%	50,579	32,678	-35.4%	1	2
OTZ : Ralph Wien Memorial	62,738	6,380	9,225	44.6%	167,132	172,616	3.3%	4	3
PGD : Charlotte County Airport	147,698	-	703	N/A	-	108,175	N/A	0	2
PGV : Pitt-Greenville	62,071	1,766	1,741	-1.4%	80,630	85,438	6.0%	1	1
PIA : Greater Peoria	249,898	6,933	6,878	-0.8%	381,626	387,304	1.5%	5	5
PIH : Pocatello Municipal	21,566	1,982	991	-50.0%	57,722	33,990	-41.1%	2	1
PIR : Pierre Municipal	14,802	1,925	1,879	-2.4%	47,495	36,662	-22.8%	2	2
PPG : Pago Pago Intl	45,486	103	110	6.8%	26,780	28,600	6.8%	1	1
PSC : Tri-Cities	327,008	6,677	5,934	-11.1%	338,097	417,032	23.3%	4	4
PSE : Ponce	95,658	2,628	835	-68.2%	175,350	125,050	-28.7%	5	1
PSG : Petersburg Municipal	18,318	1,002	727	-27.4%	90,804	78,480	-13.6%	2	1
PUW : Moscow Regional	39,134	1,502	960	-36.1%	55,574	72,960	31.3%	1	1
PVC : Provincetown Muni	10,967	2,250	2,260	0.4%	20,250	20,340	0.4%	1	1
PVU : Provo Municipal	14,858	-	366	N/A	-	35,684	N/A	0	1
RAP : Rapid City Regional	254,292	5,436	5,735	5.5%	336,291	339,167	0.9%	5	4
RDD : Redding Municipal	38,290	3,231	1,737	-46.2%	160,608	48,694	-69.7%	2	2
RDM : Roberts Field	230,395	8,136	5,389	-33.8%	356,345	304,758	-14.5%	4	5
RFD : Greater Rockford	102,559	1,289	693	-46.2%	123,750	99,126	-19.9%	2	3
RIW : Riverton Municipal	14,299	1,120	1,135	1.3%	25,394	23,072	-9.1%	1	1
RKS : Sweetwater County	26,219	1,619	2,193	35.5%	35,898	65,790	83.3%	1	2
ROA : Roanoke Municipal	320,961	11,285	8,982	-20.4%	548,977	455,963	-16.9%	5	4

Airport	Enplaned Pax (2011)	Departures (2007)	Departures (2012)	% Change Flights 07-12	Seats (2007)	Seats (2012)	% Change Seats 07-12	Airlines Serving (2007)	Airlines Serving (2012)
ROP : Rota	20,961	1,736	1,580	-9.0%	57,088	50,024	-12.4%	2	3
ROW : Roswell Industrial	37,262	1,176	1,042	-11.4%	29,629	46,548	57.1%	2	1
RST : Rochester Municipal	110,295	5,114	3,235	-36.7%	281,842	154,082	-45.3%	3	3
SAF : Santa Fe County Muni	43,329	1,123	1,484	32.1%	20,611	66,372	222.0%	2	2
SBN : St Joseph County	305,386	10,086	6,417	-36.4%	509,533	381,746	-25.1%	6	5
SBP : San Luis Obispo Cty	132,692	7,041	4,910	-30.3%	249,268	171,848	-31.1%	5	2
SBY : Wicomico County	72,568	2,888	2,344	-18.8%	113,395	107,105	-5.5%	1	2
SCC : Prudhoe / Deadhorse	37,711	2,096	1,837	-12.4%	104,783	85,019	-18.9%	2	2
SCE : State College	144,054	5,312	4,736	-10.8%	215,036	199,192	-7.4%	4	3
SCK : Stockton Airport	56,044	253	444	75.5%	37,950	67,560	78.0%	1	1
SGF : Springfield Branson Re	349,091	11,730	8,061	-31.3%	637,399	458,058	-28.1%	5	4
SGU : St George Municipal	48,582	3,639	2,034	-44.1%	109,170	88,860	-18.6%	2	2
SHR : Sheridan County	13,324	2,213	1,096	-50.5%	47,096	24,883	-47.2%	2	1
SHV : Shreveport Regional	265,104	10,187	7,795	-23.5%	471,506	399,570	-15.3%	5	5
SIG : Isla Grande	20,353	1,031	-	-100.0%	19,589	-	-100.0%	1	0
SIT : Sitka	65,193	1,340	1,265	-5.6%	192,960	182,160	-5.6%	1	1
SJT : Mathis Field	54,955	2,602	1,422	-45.3%	103,070	72,885	-29.3%	2	1
SMX : Santa Maria Public	41,620	1,937	1,549	-20.0%	79,230	68,126	-14.0%	2	2
SPI : Springfield Capital	71,862	2,562	2,069	-19.2%	111,054	106,557	-4.0%	4	5
SPS : Sheppard Afb	37,248	2,317	1,292	-44.2%	69,510	65,620	-5.6%	1	1
STS : Sonoma County	102,414	972	1,870	92.4%	72,298	142,120	96.6%	1	1
STX : Alexander Hamilton	184,331	10,196	8,620	-15.5%	339,252	282,554	-16.7%	5	6
SUN : Friedman Memorial	50,885	3,953	2,029	-48.7%	146,338	79,224	-45.9%	2	2
SWF : Newburgh Stewart	209,966	7,387	3,757	-49.1%	642,010	225,248	-64.9%	7	3
TEX : Telluride	11,017	1,438	776	-46.0%	31,102	14,744	-52.6%	3	1
TIQ : Tinian	16,706	4,736	4,715	-0.4%	37,888	37,720	-0.4%	1	1
TLH : Tallahassee Muni	305,686	12,558	8,201	-34.7%	650,051	449,193	-30.9%	4	5
TOL : Toledo Express	81,127	6,376	1,600	-74.9%	263,487	95,059	-63.9%	5	4
TRI : Tri City Arpt, Tn-Regi	220,586	7,540	5,048	-33.1%	345,412	277,508	-19.7%	4	4
TVC : Cherry Capital	170,977	4,548	4,457	-2.0%	280,310	231,078	-17.6%	4	3
TWF : City County	38,533	1,979	1,076	-45.6%	59,370	32,400	-45.4%	1	2
TXK : Texarkana Municipal	28,698	1,879	1,055	-43.9%	69,008	44,287	-35.8%	2	1
TYR : Pounds Field	72,602	3,505	2,773	-20.9%	112,742	113,628	0.8%	2	3
UNK : Unalakleet	12,332	1,696	3,422	101.8%	17,795	49,483	178.1%	3	3
UTM : Tunica Municipal Airport	41,670	-	-	N/A	-	-	N/A	0	0
VDZ : Valdez Municipal	16,147	955	1,661	73.9%	31,069	36,681	18.1%	1	2
VGT : North Air Terminal	55,161	-	-	N/A	-	-	N/A	0	0
VLD : Valdosta Regional	38,066	1,058	1,034	-2.3%	54,686	51,700	-5.5%	1	1
VQS : Vieques	55,647	4,936	5,966	20.9%	64,134	58,343	-9.0%	2	4
WRG : Wrangell Airport	11,674	726	727	0.1%	89,424	78,480	-12.2%	1	1
YAK : Yakutat	10,517	726	724	-0.3%	86,904	78,264	-9.9%	1	1

Airport	Enplaned Pax (2011)	Departures (2007)	Departures (2012)	% Change Flights 07-12	Seats (2007)	Seats (2012)	% Change Seats 07-12	Airlines Serving (2007)	Airlines Serving (2012)
YKM : Yakima Air Terminal	55,902	2,587	2,222	**-14.1%**	101,049	90,188	**-10.7%**	2	2
YNG : Youngstown Muni	37,048	79	247	**212.7%**	11,850	37,642	**217.7%**	1	1
YUM : Yuma International	82,420	3,509	3,195	**-8.9%**	123,842	135,058	**9.1%**	4	2
Grand Total (Non Hubs)	**22,773,980**	**811,611**	**686,905**	**-15.4%**	**35,086,498**	**31,326,084**	**-10.7%**		

Appendix F: Summary of Scheduled Domestic Departures for Essential Air Service Airports

Airport	Enplaned Pax (2011)	Departures (2007)	Departures (2012)	% Change Flights 07-12	Seats (2007)	Seats (2012)	% Change Seats 07-12	Airlines Serving (2007)	Airlines Serving (2012)
ABR : Aberdeen Municipal	24,503	2,341	718	-69.3%	75,190	35,900	-52.3%	2	1
AHN : Athens Municipal	1,655	678	704	3.8%	12,882	5,838	-54.7%	1	2
AIA : Alliance Municipal	1,730	991	875	-11.7%	18,829	16,625	-11.7%	1	1
ALO : Waterloo Municipal	22,297	1,344	669	-50.2%	50,544	30,396	-39.9%	1	2
ALS : Alamosa Municipal	7,104	939	1,062	13.1%	17,841	20,178	13.1%	1	1
AOO : Blair County	4,107	1,124	948	-15.7%	29,126	32,232	10.7%	1	1
APN : Alpena County Regl	12,320	1,213	691	-43.0%	41,242	34,550	-16.2%	1	1
ART : Watertown Municipal	4,449	2,108	626	-70.3%	40,052	27,544	-31.2%	2	1
ATY : Watertown Municipal	8,984	1,458	1,059	-27.4%	49,572	25,633	-48.3%	1	2
AUG : Augusta State	5,611	1,263	1,011	-20.0%	23,997	9,099	-62.1%	1	1
BFD : Bradford Regional	2,908	1,354	941	-30.5%	46,036	17,879	-61.2%	1	2
BFF : Scottsbluff County	9,912	1,023	1,399	36.8%	19,437	26,581	36.8%	1	1
BHB : Bar Harbour	12,510	1,429	1,163	-18.6%	27,151	23,167	-14.7%	1	3
BJI : Bemidji Municipal	23,910	1,772	702	-60.4%	56,293	35,100	-37.6%	2	1
BKW : Raleigh County Meml	2,966	990	639	-35.5%	20,790	21,726	4.5%	1	1
BRD : Crow Wing	17,574	1,841	658	-64.3%	62,594	32,900	-47.4%	1	1
BRL : Burlington Muni	7,020	449	1,383	208.0%	8,531	13,112	53.7%	2	2
CDC : Cedar City Municipal	8,690	1,570	646	-58.9%	29,830	27,060	-9.3%	2	1
CDR : Chadron Municipal	1,980	626	839	34.0%	11,894	15,941	34.0%	1	1
CEC : Jack Mc Namara Field	14,887	1,055	1,008	-4.5%	31,650	30,240	-4.5%	1	1
CEZ : Cortez Municipal Airport	6,989	953	1,161	21.8%	18,107	22,059	21.8%	1	1
CGI : Cape Girardeau Muni	5,940	320	1,253	291.6%	6,080	11,277	85.5%	2	1
CIU : Chippewa County	18,717	729	654	-10.3%	24,786	32,700	31.9%	1	1
CKB : Benedum	12,012	816	962	17.9%	27,744	34,556	24.6%	2	2
CMX : Houghton County Meml	23,024	1,082	733	-32.3%	42,484	36,650	-13.7%	1	1
CNM : Cavern City Air Term	2,707	748	1,014	35.6%	12,232	8,112	-33.7%	2	1
CNY : Canyonlands Field	9,181	658	994	51.1%	12,502	18,886	51.1%	2	1
COD : Yellowstone Regional	28,019	1,336	919	-31.2%	45,057	42,670	-5.3%	2	2
CVN : Clovis Municipal	2,033	755	637	-15.6%	14,345	12,103	-15.6%	1	1
DDC : Dodge City Municipal	4,501	1,914	1,462	-23.6%	36,366	27,778	-23.6%	2	1
DEC : Decatur	7,808	1,462	1,882	28.7%	27,778	17,800	-35.9%	3	2
DIK : Dickinson	19,001	1,822	1,571	-13.8%	54,660	47,130	-13.8%	1	1
DUJ : Jefferson County	5,986	1,132	1,305	15.3%	21,508	24,795	15.3%	1	3
DVL : Devils Lake Muni	5,599	626	958	53.0%	21,284	18,202	-14.5%	1	1
EAR : Kearney Muni	11,019	990	1,316	32.9%	29,590	29,184	-1.4%	1	1
EAU : Eau Claire Municipal	19,097	1,963	729	-62.9%	66,319	36,450	-45.0%	2	1
ELD : Goodwin Field	1,803	1,252	1,255	0.2%	23,788	11,314	-52.4%	1	1
ELY : Yelland	589	315	327	3.8%	5,985	6,213	3.8%	2	1
ESC : Delta County	13,478	995	1,232	23.8%	18,905	61,600	225.8%	1	1

Airport	Enplaned Pax (2011)	Departures (2007)	Departures (2012)	% Change Flights 07-12	Seats (2007)	Seats (2012)	% Change Seats 07-12	Airlines Serving (2007)	Airlines Serving (2012)
FKL : Chess-Lambertin	1,284	802	1,254	56.4%	15,238	23,826	56.4%	1	2
FOD : Fort Dodge Municipal	10,866	939	1,007	7.2%	31,926	24,527	-23.2%	1	2
GBD : Great Bend Municipal	1,021	783	641	-18.1%	14,877	12,179	-18.1%	2	1
GCK : Garden City Muni	11,690	1,693	1,122	-33.7%	32,167	34,918	8.6%	2	2
GDV : Dawson Community	703	722	627	-13.2%	13,718	11,913	-13.2%	1	1
GGW : Glasgow Intl	1,835	626	581	-7.2%	11,894	11,039	-7.2%	1	1
GLH : Greenville Municipal	7,417	727	837	15.1%	24,718	37,821	53.0%	1	2
GRI : Grand Island Air Pk	47,167	1,565	897	-42.7%	29,735	63,312	112.9%	1	2
HGR : Washington County	5,618	468	1,374	193.6%	8,892	20,650	132.2%	1	3
HIB : Chisholm	12,272	1,383	1,041	-24.7%	47,022	52,050	10.7%	1	1
HON : W W Howes Municipal	1,681	1,152	1,111	-3.6%	28,719	21,109	-26.5%	1	1
HOT : Memorial Field	1,543	1,316	1,152	-12.5%	25,004	10,368	-58.5%	1	1
HRO : Boone County	2,771	1,148	1,466	27.7%	21,812	13,194	-39.5%	1	1
HVR : Havre City-County	1,025	626	627	0.2%	11,894	11,913	0.2%	1	1
HYS : Hays Municipal	11,397	1,315	1,986	51.0%	24,985	37,734	51.0%	2	1
IGM : Kingman Municipal	975	973	732	-24.8%	18,487	13,908	-24.8%	2	1
IMT : Ford	11,324	1,254	693	-44.7%	23,826	34,650	45.4%	1	1
INL : Falls International	15,157	1,049	644	-38.6%	39,154	32,200	-17.8%	1	1
IPL : Imperial County	6,136	1,300	727	-44.1%	39,000	21,810	-44.1%	1	1
IRK : Kirksville Municipal	5,100	1,248	1,095	-12.3%	23,712	9,855	-58.4%	2	1
IWD : Gogebic County	3,391	720	691	-4.0%	13,680	15,487	13.2%	1	2
JBR : Jonesboro Municipal	989	626	942	50.5%	11,894	8,799	-26.0%	1	3
JHW : Jamestown Municipal	3,483	1,350	1,393	3.2%	45,900	26,467	-42.3%	1	2
JLN : Joplin Municipal	27,379	1,430	730	-49.0%	27,170	35,060	29.0%	2	1
JMS : Jamestown Municipal	5,355	626	1,153	84.2%	21,284	29,220	37.3%	1	2
JST : Johnstown/Cambria	7,956	1,247	1,040	-16.6%	42,398	35,360	-16.6%	1	1
LAR : General Brees Field	8,493	1,617	1,467	-9.3%	30,723	29,127	-5.2%	1	2
LBF : Lee Bird Field	10,962	1,022	1,034	1.2%	19,418	19,646	1.2%	1	1
LBL : Liberal Municipal	8,007	988	1,123	13.7%	18,772	21,337	13.7%	1	1
LEB : Lebanon Regional	9,106	1,194	2,290	91.8%	28,146	20,610	-26.8%	1	1
LNS : Lancaster	7,575	702	1,650	135.0%	13,338	14,979	12.3%	1	2
LUP : Kalaupapa	520	1,092	1,098	0.5%	8,736	8,784	0.5%	1	1
LWB : Greenbrier Valley	17,281	1,061	710	-33.1%	32,022	28,772	-10.1%	2	4
LWT : Lewistown Municipal	348	1,252	1,255	0.2%	23,788	23,845	0.2%	1	1
MAZ : El Mani	4,961	1,561	1,462	-6.3%	14,049	13,158	-6.3%	1	1
MBL : Blacker	11,220	674	362	-46.3%	12,806	12,095	-5.6%	1	2
MCE : Merced Municipal	3,181	1,604	1,331	-17.0%	30,476	25,289	-17.0%	2	1
MCK : Mccook Municipal	1,810	626	1,036	65.5%	11,894	19,684	65.5%	1	1
MCN : Lewis B. Wilson Airport	917	996	1,359	36.4%	53,784	10,872	-79.8%	1	1
MCW : Mason City Municipal	11,594	1,878	1,311	-30.2%	63,852	30,303	-52.5%	1	2
MEI : Key Field	18,008	679	697	2.7%	31,150	31,943	2.5%	1	2

Airport	Enplaned Pax (2011)	Departures (2007)	Departures (2012)	% Change Flights 07-12	Seats (2007)	Seats (2012)	% Change Seats 07-12	Airlines Serving (2007)	Airlines Serving (2012)
MGW : Morgantown Municipal	10,674	1,102	1,081	-1.9%	37,468	36,754	-1.9%	2	1
MKG : Muskegon County	14,101	2,385	729	-69.4%	61,695	36,450	-40.9%	2	1
MKL : Mckellar Field	484	188	1,201	538.8%	3,572	11,216	214.0%	2	2
MLS : Miles City Municipal	591	1,237	1,132	-8.5%	23,503	21,508	-8.5%	1	1
MSL : Muscle Shoals	7,812	990	641	-35.3%	33,660	29,364	-12.8%	1	2
MSS : Richard Field	4,396	939	1,095	16.6%	17,841	9,855	-44.8%	2	1
MWA : Williamson County	10,558	947	1,879	98.4%	17,993	16,911	-6.0%	3	1
OGS : Ogdensburg Municipal	3,589	1,295	1,095	-15.4%	24,605	9,855	-59.9%	2	1
OLF : Wolf Point Intl	1,479	991	966	-2.5%	18,829	18,354	-2.5%	1	1
OWB : Daviess County	17,296	187	1,138	508.6%	3,553	38,528	984.4%	2	2
PAH : Barkley Regional	17,978	1,087	731	-32.8%	36,958	36,550	-1.1%	1	1
PBG : Plattsburgh Intl	139,698	525	1,504	186.5%	11,678	139,910	1098.1%	3	5
PDT : Pendleton Municipal	4,952	987	1,145	16.0%	36,519	10,353	-71.7%	1	1
PGA : Page	23,938	1,134	1,897	67.3%	21,546	34,963	62.3%	1	2
PIB : Hesler/Noble Field	16,095	730	640	-12.3%	24,820	29,314	18.1%	1	2
PKB : Wood County	7,551	823	1,254	52.4%	27,982	23,826	-14.9%	2	2
PLN : Emmet County	22,708	1,218	808	-33.7%	49,588	40,400	-18.5%	1	1
PQI : Presque Isle Muni	14,264	998	1,182	18.4%	33,932	40,188	18.4%	1	2
PRC : Prescott Mun	5,159	1,788	1,288	-28.0%	33,972	24,472	-28.0%	2	1
PUB : Pueblo Memorial	22,470	625	1,238	98.1%	11,875	27,845	134.5%	1	2
RHI : Oneida County	26,764	3,113	776	-75.1%	84,240	35,407	-58.0%	2	1
RKD : Knox County Regional	16,680	1,687	1,316	-22.0%	32,053	11,844	-63.0%	1	1
RUT : Rutland State	5,997	684	1,155	68.9%	11,286	10,395	-7.9%	2	1
SDY : Richard Municipal	5,557	1,041	1,117	7.3%	19,779	21,223	7.3%	1	1
SHD : Shenandoah Valley	12,033	1,064	1,400	31.6%	23,876	49,472	107.2%	1	2
SLK : Adirondack	5,770	1,373	1,243	-9.5%	26,087	11,187	-57.1%	2	1
SLN : Salina Municipal	2,857	757	942	24.4%	14,383	8,478	-41.1%	1	1
SOW : Show Low	3,996	1,060	1,372	29.4%	20,140	26,068	29.4%	1	1
SUX : Sioux Gateway	28,137	1,828	674	-63.1%	78,386	33,700	-57.0%	2	2
SVC : Grant County	1,609	625	670	7.2%	11,875	12,730	7.2%	1	1
TBN : Forney Aaf	6,978	361	1,513	319.1%	6,859	13,617	98.5%	2	1
TUP : Lemons Municipal	12,615	2,420	1,302	-46.2%	86,914	57,042	-34.4%	2	2
TVF : Thief River Falls	2,418	626	865	38.2%	21,284	27,147	27.5%	1	2
UIN : Baldwin Field	9,083	1,215	1,897	56.1%	23,085	17,073	-26.0%	3	1
VCT : County-Foster	5,200	730	438	-40.0%	24,820	12,492	-49.7%	1	3
VEL : Vernal	5,645	670	980	46.3%	12,730	18,620	46.3%	2	1
VIS : Visalia Municipal	2,980	1,242	1,448	16.6%	23,598	27,512	16.6%	2	1
WRL : Worland Municipal	3,070	626	615	-1.8%	11,894	11,685	-1.8%	1	1
WYS : Yellowstone	5,323	266	280	5.3%	7,980	8,400	5.3%	1	1
Grand Total (Essential Air Service)	**1,220,643**	**131,034**	**124,500**	**-5.0%**	**3,297,919**	**2,991,701**	**-9.3%**		