THANKSGIVING IN THE SKIES

A LOOK AT THE FUTURE OF AIR TRAVEL IN AMERICA

U.S. TRAVEL ASSOCIATION

AN ANALYSIS BY CAMBRIDGE SYSTEMATICS, INC.

THANKSGIVING IN THE SKIES

A LOOK AT THE FUTURE OF AIR TRAVEL IN AMERICA

EXECUTIVE SUMMARY

Travel is an essential part of our lives and a major contributor to the United States economy. Travel ranks among the top 10 industries in 48 states and the District of Columbia in terms of employment. In 2012, travel spending generated $2.0 trillion in economic output, which supported 14.6 million American jobs – 1 out of every 8 jobs.

Although the forecasts for air passenger growth are strong, several factors will influence whether or not they become a reality. The U.S. can only reap the benefits of increased air travel by modernizing and expanding U.S. airports and the National Airspace System and – of equal importance – improving the air travel experience. However, very little progress is being made on this front and the U.S. aviation system may be headed towards an era of chronic congestion, delays and frustration.

The ultimate measuring stick of how well our nation's aviation infrastructure will be able to perform in the future is during its annual stress test: the Thanksgiving holiday weekend. As travel levels grow and U.S. airports remain stuck in neutral, the average day of air travel in the U.S. could very well resemble its busiest today.

The U.S. Travel Association commissioned a report to examine current and projected passenger demands on the national aviation system. According to the findings, growing travel demand, combined with inadequate aviation infrastructure, will soon produce consistently crowded airports, runways and skies that most travelers only experience in the days before Thanksgiving.

Despite the substantial economic benefits that could result from increased air travel, Congress is not stepping up to modernize airports, to improve the passenger experience and to accommodate future demand for air travel. In fact, recent events on Capitol Hill, such as across-the-board budget cuts, are making it increasingly unlikely that airports will be able to adequately prepare for the future.

As a result of inadequate airport infrastructure, an outdated air traffic control system and an unstable federal funding model, the U.S. faces significant challenges to efficiently handle current demand for air travel and reduce unnecessary hassles and frustrations. Unless significant federal policy and regulatory changes are made, the U.S. aviation system will be unable or ill-equipped to accommodate the forecasted growth in domestic and international travel.

METHODOLOGY

Cambridge Systematics conducted the aviation study on behalf of U.S. Travel. The study team used Orbitz Worldwide passenger data to compare normal passenger traffic levels at major U.S. airports with passenger volumes during the 2011 Thanksgiving weekend – one of the busiest travel periods of that year. Cambridge also drew upon Federal Aviation Administration (FAA) forecasts to project future airport passenger volumes. Based on their analysis, the study team determined that some of our nation's top airports will regularly experience Thanksgiving-like passenger volumes within the next decade.

Introduction

Travel is an essential part of our lives and a major contributor to the United States economy. Travel ranks among the top 10 industries in 48 states and the District of Columbia in terms of employment. In 2012, travel spending generated $2.0 trillion in economic output, which supported 14.6 million American jobs – 1 out of every 8 jobs.

As the U.S. strives to remain competitive in a global economy, travel will play an increasingly important role in American business and life. Travel increases corporate sales and profits; it improves employee productivity; and it keeps Americans connected to their families, friends, and the world.

Travel Powering Economic Recovery

Growth in domestic and international travel is also fueling our economic recovery. Over the past three years, the travel industry has created jobs at a 6 percent faster rate than the rest of the economy, with more than 460,000 jobs added since early 2010.

Air travel has made a significant contribution to this recovery. During the first half of 2013, domestic and international enplanements have increased more than 3 percent compared to the same time period during 2010.[1] Through the first eight months of 2013, travel exports, which include spending in the U.S. by overseas air travelers, increased 8.5 percent compared with last year.[2] By comparison, other U.S. exports of goods and services were up just 1.8 percent during the same timeframe.[3]

There are positive signs that air travel will continue its steady climb and power further economic growth and job creation in communities across the U.S.

According to FAA forecasts, the number of annual domestic and international air passengers in the U.S. will reach 1 billion travelers by 2027. During the same time period, international air passengers to and from the U.S. are forecast to grow by more than 4 percent a year – almost double the growth rate of domestic air travelers.[4]

Forecast or Fairytale?

Although the forecasts for growth are strong, several factors will influence whether or not they become a reality. First and foremost, increases in air travel are closely tied to the Gross Domestic Product (GDP) and the overall health of the U.S. economy. Current economic forecasts predict that U.S. GDP will grow at a tepid 2 percent annual rate in 2015, but return to much stronger growth over time.[5] If these predications hold, U.S. economic performance should bolster the FAA's predictions for rising passenger demand.

The second critical factor to passenger growth is the strength and performance of the U.S. and global airline industries. Domestic and foreign carriers must be able to respond to stronger passenger demand by increasing the number of flights, flying larger aircraft or adding new routes. While there are no guarantees, the airline industry is once again showing signs of strength, and U.S. carriers are expected to turn a collective profit of $6.5 billion in 2013.[6]

The final critical element is federal leadership. The increased economic benefits of a well-functioning air travel system will only become reality if Congress and other stakeholders quickly take corrective action.

---

[1] http://apps.bts.gov/xml/air_traffic/src/index.xml#CustomizeTable

[2] http://www.ustravel.org/news/press-releases/travel-exports-reach-record-high-august

[3] Ibid

[4] http://www.faa.gov/about/office_org/headquarters_offices/apl/aviation_forecasts/ aerospace_forecasts/2013-2033/media/2013_Forecast.pdf

[5] http://www.cbo.gov/publication/43907

[6] http://www.marketplace.org/topics/business/airline-profits-driven-higher-fares-bag-fees

Stuck in Neutral

Despite the substantial economic benefits that could result from increased air travel, Congress is not stepping up to modernize airports, to improve the passenger experience and to accommodate future demand. In fact, recent events on Capitol Hill are making it increasingly unlikely that airports will be able to adequately prepare for the future.

FEDERAL AVIATION AND AIRPORT FUNDING

As the number of air passengers grows, U.S. airports will need to modernize, add or expand:

1) **Airside capacity**, including the construction and redesign of runways, aprons and taxiways to handle larger aircraft and increased air traffic flow;

2) **Airport terminals**, including security screening areas, baggage handling systems and people movers between terminals to increase passenger flow; and

3) **Landside capacity**, including road and highway access, mass transit options and parking garages.

A critical source of airport funding for infrastructure projects that increase capacity and improve the passenger experience is the passenger facility charge (PFC). Airports are authorized by Congress to collect a PFC of up to $4.50 on each departing passenger, as long as the funds are spent on projects that increase competition among airlines, add additional air service, increase capacity, or reduce delays and congestion. The FAA must approve each PFC project to ensure it meets these criteria.

Despite the restrictions and oversight on the use of PFC funding, Congress capped the maximum amount each airport could collect at $4.50 in 2000, and has not allowed airports to raise the fee in 13 years. Since 2000, the purchasing power of the $4.50 PFC has decreased by 50 percent, after adjusting for inflation, leaving airports with limited options to raise additional revenue for modernization and expansion projects.[7]

The Airport and Airway Trust Fund (AATF), which pays for airport infrastructure grants, air traffic control modernization, and other aviation system improvements is also experiencing challenges. Revenue for the AATF is raised through a 7.5 percent excise tax that is calculated and added to the cost of a commercial airline ticket. However, the 7.5 percent excise tax does not apply to airline baggage or other ancillary fees. As U.S. airlines undergo an industry-wide shift to rely more heavily on ancillary charges, revenue that would have historically been paid into AATF is lost.

[7] http://aci-na.org/sites/default/files/airport_financing_policy__final.pdf

The U.S. Department of Transportation (DOT) estimates that U.S. airlines collected $3.4 billion in baggage fees alone in 2012.[8] If baggage fees had been included as part of the airline ticket or subject to the 7.5 percent excise tax themselves, an additional $255 million would have been raised for the AATF. Since 2009, when ancillary fees became widely used, the American Association of Airport Executives (AAAE) estimates a 7.5 percent tax on bag fees would have generated more than $1 billion.[9]

These funding challenges have led to a significant backlog of airport infrastructure projects and put federal funding for air traffic control modernization at risk. Airports Council International-North America now estimates that there is a $71.3 billion backlog of projects that need to be completed by 2017.

AIR TRAFFIC CONTROL MODERNIZATION

The U.S. air traffic control system uses technology from the World War II era that causes systemic delays and cancellations. The FAA is implementing the Next Generation Air Transportation System (NextGen) – which is a satellite-based navigation system that could increase airspace capacity by one-third, reduce delays and increase airport efficiency. The FAA has set a goal of fully implementing NextGen by 2025 and has made some initial progress. However, NextGen remains mired by setbacks, cost overruns and delays as a result of FAA mismanagement and congressionally mandated, across-the-board budget cuts to critical NextGen programs.

SEVERE BUDGET CUTBACKS

Through the Budget Control Act of 2011 (BCA), Congress implemented across-the-board spending cuts and put in place tight spending caps through 2021. In Fiscal Year 2013, these spending cuts stalled progress on the development of key NextGen technologies, further jeopardizing the prospect that the full slate of procedures and equipment can be completed on time by 2025. The cuts also forced the FAA to consider other extraordinary measures, like furloughing air traffic controllers, which would have snarled the national aviation system and led to substantial economic losses for the travel industry. In a short-sighted move, Congress transferred $253 million in airport infrastructure funds to pay air traffic controllers' salaries and stave off furloughs. The transfer averted a short-term crisis of reduced flight schedules and chronic delays caused by air traffic controller shortages, but only exacerbated the long-term challenge to improve and expand U.S. airports.[10]

Although the transfer was only performed on a one-time basis, the FAA is facing similar budgetary shortfalls in Fiscal Year 2014, and Congress will again need to find additional sources of funding to avert air traffic controller furloughs. It is possible infrastructure funds could again be used to plug the hole.

[8] http://www.rita.dot.gov/bts/sites/rita.dot.gov.bts/files/subject_areas/airline_information/baggage_fees/html/2012.html
[9] http://www.aaae.org/news_publications/aaae_press_releases/viewRelease.cfm?p=E2C65828-03AD-707D-25986023D27C3701
[10] http://www.bloomberg.com/news/2013-05-01/airport-projects-imperiled-by-congress-faa-furlough-fix.html

What does the future hold?

As a result of inadequate airport infrastructure, an outdated air traffic control system and an unstable federal funding model, the U.S. faces significant challenges to efficiently handle current demand for air travel and reduce unnecessary hassles and frustrations. Of even greater concern, unless significant federal policy and regulatory changes are made, the U.S. aviation system will be unable or ill-equipped to accommodate the forecasted growth in domestic and international travel.

INADEQUATE AVIATION CAPACITY

In 2007, the FAA Future Airport Capacity Taskforce (FACT) predicted that 25 airports in 17 metropolitan areas would reach capacity by 2025 and would be unable to accommodate air travel demand.

According to a 2013 study by the Eno Center for Transportation, John F. Kennedy International (JFK), Newark Liberty International (EWR), San Francisco International (SFO) and Los Angeles International (LAX) airports will all face significant capacity challenges within the next 20 years. The Eno report estimates that by 2016 the U.S. economy will lose an annual $6 billion in travel spending because of capacity constraints at JFK and EWR alone. That number dramatically increases to $48 billion a year in lost travel spending by 2034.

DELAYS AND CANCELLATIONS

During the first half of 2013, one in every five flights (20%) in the U.S. was delayed or cancelled. According to the Bureau of Transportation Statistics, since 2011, problems within the National Aviation System (NAS) caused the greatest number of flight delays, although air carrier delays accounted for the largest total in terms of delay time.[11] NAS problems include aircraft congestion and non-severe weather incidents, which could be reduced through infrastructure improvements and the implementation of NextGen.

The already high level of flight delays and cancellations in the U.S. reduce the reliability of air travel, increase passenger frustration, and influence how often consumers choose to travel by air. According to a 2012 survey, unpredictable flight delays ranked as one of the top three passenger frustrations.[12] And a 2008 U.S. Travel survey found that travelers avoided one to two trips each year because of the hassles involved with flying, and ranked flight delays and cancellations as their top concern.

As the number of domestic and international passengers increase, the number of flight delays and cancellations can only be expected to increase.

[11] http://www.transtats.bts.gov/HomeDrillChart_Month.asp?URL_SelectMonth=&URL_SelectYear=

[12] http://www.multivu.com/mnr/57948-tripadvisor-annual-air-travel-survey-flyer-preferences-and-annoyances

The Travel Experience

Delay data, passenger forecasts and aviation capacity projections are complex topics that can be difficult for ordinary travelers to grasp. Yet, the problems that they point to will have very real consequences that will impact the way Americans travel, do business and connect with the world. Because of this, it's important for travelers to understand exactly how America's challenge will impact their lives.

If Congress is unable to act, what will travelers see and what will they experience when arriving at U.S. airports? How will it impact reliability of air service and the quality of the overall traveler experience?

To answer these questions, the U.S. Travel Association commissioned research to determine what the air travel experience could be like in the U.S. if air travel continues to grow, airport improvements remain stuck in neutral, and Congress continues to neglect our nation's air travel infrastructure.

Thanksgiving in the Skies

The ultimate touchstone of how well our nation's aviation infrastructure performs is during its annual stress test: the Thanksgiving holiday weekend. As travel levels grow and U.S. airports remain stuck in neutral, the average day of air travel in the U.S. could very well resemble its busiest today.

According to the Cambridge analysis, passenger volumes on the Wednesday before Thanksgiving can be anywhere between 130-259 percent higher than the average day. These passenger volumes will become more frequent as air travel grows.

Virtually everyone who has traveled over the Thanksgiving holiday understands how the substantial increase in passenger volume can increase travel times to and from airports, lead to longer wait times at airline check-in counters and security checkpoints, add to the frequency of flight delays and cancellations, or lengthen the time it takes to retrieve checked baggage. From landside and terminal to airside and airspace capacity, Thanksgiving travel pushes U.S. airports to the brink and provides a frequently frustrating experience for travelers.

Beyond the passenger anecdotes and annual news coverage, historical congestion and delay data from the Wednesday before Thanksgiving (WBT) paint a fuller picture of what air travel will more frequently resemble if air travel increases, but U.S. airports remain unable to move forward.

Overall, from 2004 to 2012, delayed arrivals on the WBT averaged 2.22 percent higher when compared with the national average during that same time period.[13] While a 2.2 percent increase may seem small, adding a 2.2 percent arrival delay increase to the number of 2012 flight arrivals would add an additional 119,000 arrival delays each year, averaging an additional 329 arrival delays each day. U.S. Travel approached this study with one question in mind: "Given our nation's aviation infrastructure, when can travelers expect Thanksgiving-type congestion on a regular basis?"

[13] http://www.transtats.bts.gov/holidayDelay.asp?pn=1

MAJOR FINDINGS

U.S. Travel focused on the top 30 U.S. airports, which accounted for 70 percent of all the passenger enplanements in 2012.

- One in five of our major airports are already experiencing Thanksgiving-like congestion levels at least one day every week, including John F. Kennedy International in New York, McCarran International in Las Vegas, Orlando International, and Chicago Midway.
- 24 of the top 30 airports will experience this same congestion level within the next five years.
- Unless Congress acts to improve our nation's airports, air travel in the United States is headed for Thanksgiving-like congestion year-round.
- Within the next decade, 25 of the nation's top 30 airports will experience the same congestion as the Wednesday before Thanksgiving two days each week.
- For six of these airports, this will happen by 2016.
- Within the next 15 years, every other day will feel like the Wednesday before Thanksgiving at over half of America's largest airports.

Congress Must Act to Modernize The U.S. Aviation System

The case for action is clear. At present, one in every five U.S. flights is delayed.[14] U.S. airports consistently place towards the bottom in global rankings. Passenger-frustration levels remain high and dampen demand for travel. Congress and the Administration must act to provide the national leadership and significant investment our aviation system so desperately needs. In order for the U.S. to reap the full economic benefits of the forecasted growth of air passengers and prevent the typical day of air travel in the United States from feeling like "Thanksgiving in the skies," Congress and the Administration must act to:

1) **Modernize the U.S. air traffic control system** and explore innovative options to complete and manage the program;

2) **Reform aviation financing** in a way that puts all options on the table, including an examination of user fees and inventive funding models for air traffic control; and

3) **Take corrective action** to prevent air traffic control furloughs, cuts to critical NextGen programs and closure of FAA contract towers caused by the BCA, without using funds from airport infrastructure.

[14] http://www.transtats.bts.gov/HomeDrillChart_Month.asp?URL_SelectMonth=&URL_SelectYear=

The Analysis

An analysis of patterns of airport use confirms what longer distance travelers know from painful, personal experience: The Thanksgiving Day period exhibits intense peaking for air travel at the nation's airports.

Throughout the year, peak period passenger volumes are commonly 169 percent to 279 percent or more of average daily demand at the nation's top 50 airports. However, one of the busiest peak periods for the top 50 U.S. airports, in terms of the number of passengers traveling, is the Thanksgiving weekend, with volumes at top airports as high as 256 percent of the average day. In particular, the Wednesday before Thanksgiving stands out for its high passenger volumes. While today's Thanksgiving Day period may seem unusually busy, these high volume days will become much more common in the future. At rates of growth in terms of enplanements projected by the Federal Aviation Administration (FAA), most airports will experience today's Thanksgiving levels of passenger volumes one day a week within the next five years.

- Major U.S. airports experience 1.7 to 2.8 times as many passengers on their busiest days as they do on average days.
- For many major U.S. airports, the busiest day of the year is the Wednesday before Thanksgiving. Other busy days coincide with major holidays such as the days immediately before Christmas and following New Years Day, Labor Day Weekend, and other holidays.
- In the near future, passengers will experience Wednesday before Thanksgiving conditions much more frequently: 39 of the top 50 U.S. airports will experience Thanksgiving-like conditions at least one day a week within five years.

1.0 STUDY OBJECTIVE

The objective of the study is to compare the "normal" passenger traffic levels of major airports with the peak demand that is often associated with seasonal and holiday periods. The study team compared airport passenger volumes on Thanksgiving weekend, which is one of the busiest travel periods of the year, with other days of the year. The study also applies forecasts of travel growth developed by the FAA to portray the difference between current average and future airport volumes. One goal was to illustrate when average daily passenger traffic at airports will look and feel like Thanksgiving.

2.0 METHODOLOGY

The study analyzed daily volume data from Orbitz Worldwide for transactions that represent 94 percent of United States airport passengers. The Orbitz data was analyzed for the top 100 U.S. airports to capture daily variations in passenger demand during 2011. The daily volumes were analyzed to identify average and peak days. FAA arrival enplanements (boardings) are used to rank the top 100 airports. Through its Terminal Area Forecasts (TAF), the FAA also provides specific forecasts of passenger enplanements for each airport. The study team applied the TAF to predict future volumes to determine when the average day begins to look like the Thanksgiving weekend.

3.0 FINDINGS: TOP AIRPORTS

The following tables and maps demonstrate the peaking characteristics of the Wednesday before Thanksgiving at the nation's 30 busiest airports. Tables 1 and 2 present the top 30 airports and describe the volumes on the Wednesday before Thanksgiving compared to the average day. The tables provide detail on other peak days, total enplanements, and milestone dates when airports will experience Thanksgiving-like congestion on a more regular basis. The top 30 airports are mapped by enplanements and by Thanksgiving peak demand, and by the year in which one day a week will feel as busy as the Wednesday before Thanksgiving.

At current rates of growth, unless capacity is added, most airports will experience Thanksgiving levels by 2040. The Federal Aviation Administration (FAA) prepares forecasts of the growth in air passengers. According to FAA's latest national forecast, while air passenger growth has remained flat during the recent recession, such growth is expected to experience an upturn in the period 2014 to 2018. According to the FAA's Terminal Area Forecasts of passenger enplanements for each airport over the entire period through 2033, growth is expected to average 2.2 percent per year. While forecasts of growth have not been provided beyond that period, it is reasonable to expect this long-term growth to continue.

The annual growth rate was applied as a Compound Annual Growth Rates (CAGR) to the peak daily traffic. The growth was used to determine the year in which the average day reaches the peak of the Thanksgiving weekend for a grouping of airports. Those results are shown in the summary table.

Under these predicted conditions—with growing passenger volumes and more days that feel as busy as the Thanksgiving travel period—America's busiest airports will face challenges in keeping up with demand. In response to these conditions, some airports have made or are making major investments in capacity additions—including new runways—like those recently built at Atlanta (2006) and O'Hare (2012). However, even with the proposed improvements, the FAA estimates that 14 of the top 50 airports will still face capacity constraints even after planned improvements occur. These airports include:

ATL: Hartsfield-Jackson Atlanta International	OAK: Oakland International
EWR: Newark Liberty International	PHL: Philadelphia International
FLL: Fort Lauderdale-Hollywood International	PHX: Phoenix Sky Harbor International
JFK: John F. Kennedy International	SAN: San Diego International
LAS: McCarran International	SFO: San Francisco International
LGA: LaGuardia LGB: Long Beach	SNA: John Wayne
MDW: Midway International	OAK: Oakland International

TABLE 1: THANKSGIVING IN THE SKIES
Today and in the Future

FAA Code	Airport Name	WBT Index Over Avg	Rank*	What Year Does / Do...		
				1 Day a Week Feel Like the WBT in 2011?	2 Days a Week Feel Like the WBT in 2011?	Every Day Feel Like the WBT in 2011?
JFK	John F Kennedy Intl	144%	6	2013	2015	2022
MCO	Orlando Intl	142%	13	2013	2015	2022
MDW	Chicago Midway	141%	25	2013	2015	2024
LAS	McCarran Intl	145%	9	2013	2016	2025
FLL	Fort Lauderdale/Hollywood Intl	145%	21	2013	2016	2026
HNL	Honolulu Intl	130%	27	2013	2016	2026
SAN	San Diego Intl-Lindbergh Field	146%	28	2014	2016	2027
MIA	Miami Intl	156%	12	2014	2017	2029
TPA	Tampa Intl	162%	29	2015	2018	2031
PDX	Portland Intl	179%	30	2015	2018	2032
LAX	Los Angeles Intl	160%	3	2015	2018	2033
IAD	Washington Dulles International	185%	22	2015	2019	2033
BWI	Baltimore-Washington Intl	170%	23	2015	2019	2033
SEA	Seattle-Tacoma Intl	163%	15	2015	2019	2035
SFO	San Francisco International	173%	7	2016	2020	2037
BOS	General Edward Lawrence Logan Intl	154%	19	2016	2020	2038
SLC	Salt Lake City Intl	193%	24	2016	2020	2038
CLT	Charlotte/Douglas Intl	206%	11	2016	2021	2039
PHX	Phoenix Sky Harbor Intl	207%	8	2017	2021	2039
IAH	George Bush Intercontinental Airport/Houston	239%	10	2017	2022	2039
PHL	Philadelphia Intl	195%	18	2017	2022	2042
EWR	Newark Intl	208%	14	2017	2023	2043
MSP	Minneapolis-St Paul Intl/Wold-Chamberlain/	185%	16	2017	2023	2045
ORD	Chicago O'Hare Intl	219%	2	2018	2024	2046
ATL	The William B Hartsfield Atlanta Intl	226%	1	2020	2027	2055
DTW	Detroit Metropolitan Wayne County	203%	17	2020	2029	2059
DFW	Dallas/Fort Worth International	248%	4	2021	2029	2058
DEN	Denver Intl	211%	5	2021	2030	2063
LGA	La Guardia	181%	20	2021	2031	2067
DCA	Ronald Reagan Washington National	194%	26	2022	2031	2068

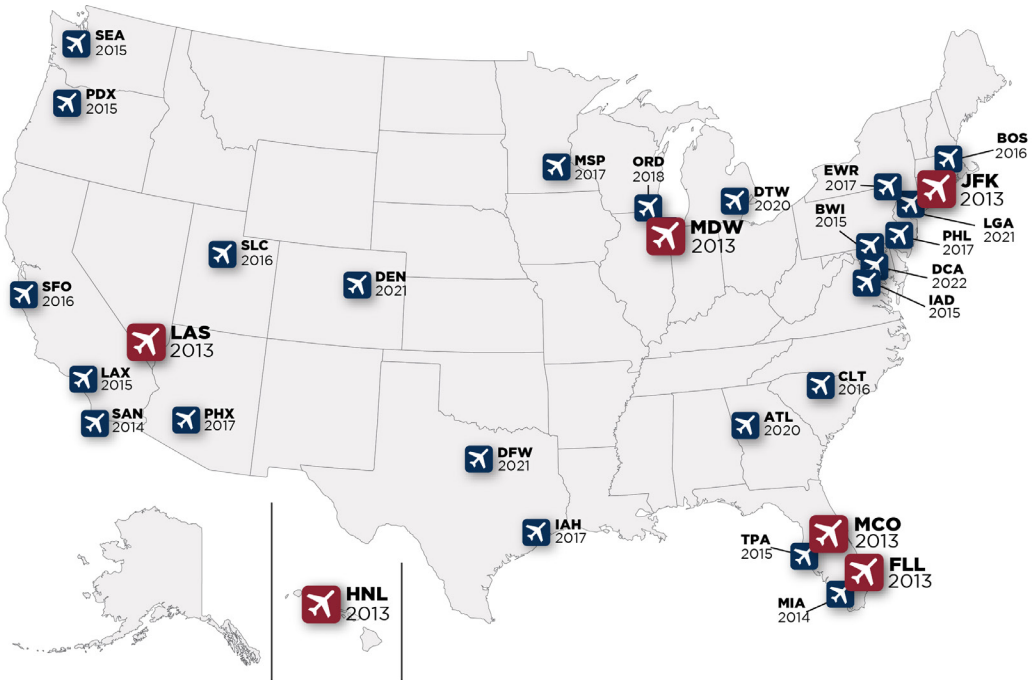
Notes: (a) Rank by 2011 FAA Arrival Enplanements (including transfers); (b) FAA Terminal Area Forecast Compound Annual Growth Rates; (c) FAA National Compound Annual Growth Rates

TABLE 2: TOP 30 U.S. AIRPORTS
2011 Arrival Enplanements and Future Growth Rates

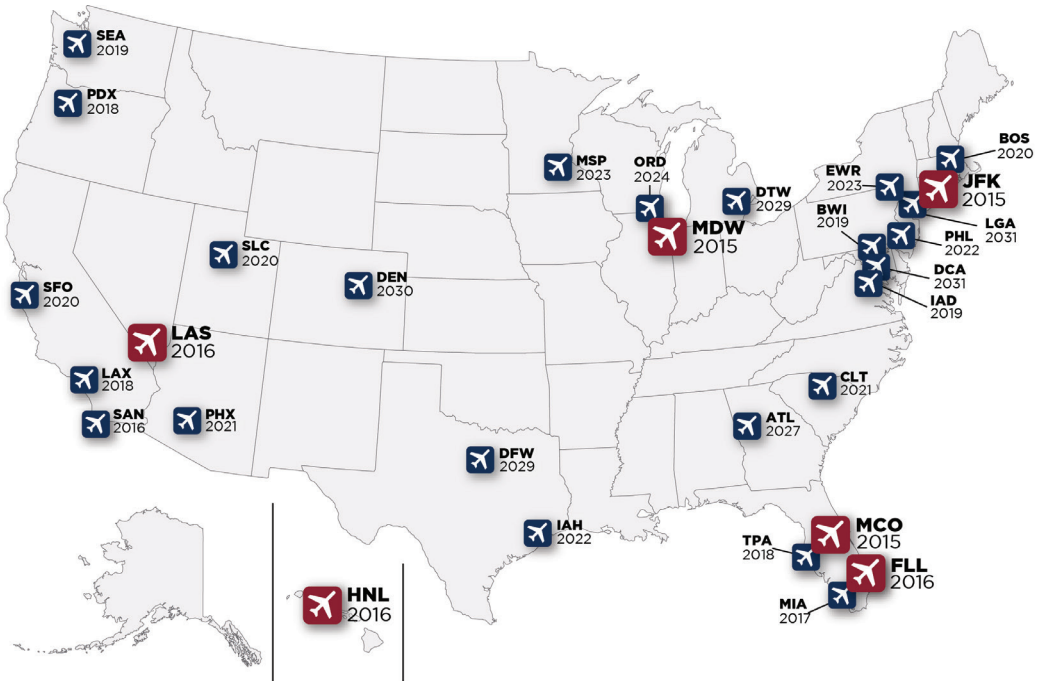
Rank*	FAA Code	Airport Name	FAA TAG CAGR*	FAA 2011 Arrival Enplanements
1	ATL	The William B Hartsfield Atlanta Intl	1.89%	44,304,279
2	ORD	Chicago O'Hare Intl	2.26%	31,939,422
3	LAX	Los Angeles Intl	2.19%	30,519,354
4	DFW	Dallas/Fort Worth International	1.96%	27,518,099
5	DEN	Denver Intl	1.45%	25,674,563
6	JFK	John F Kennedy Intl	3.37%	23,742,176
7	SFO	San Francisco International	2.17%	20,098,854
8	PHX	Phoenix Sky Harbor Intl	2.60%	19,771,642
9	LAS	McCarran Intl	2.65%	19,760,603
10	IAH	George Bush Intercontinental Airport/Houston	3.19%	19,328,732
11	CLT	Charlotte/Douglas Intl	2.61%	19,094,228
12	MIA	Miami Intl	2.51%	18,267,306
13	MCO	Orlando Intl	3.19%	17,428,634
14	EWR	Newark Intl	2.30%	16,723,466
15	SEA	Seattle-Tacoma Intl	2.04%	15,963,655
16	MSP	Minneapolis-St Paul Intl/Wold-Chamberlain/	1.84%	15,903,675
17	DTW	Detroit Metropolitan Wayne County	1.48%	15,740,224
18	PHL	Philadelphia Intl	2.19%	14,972,170
19	BOS	General Edward Lawrence Logan Intl	1.64%	14,207,238
20	LGA	La Guardia	1.06%	11,951,229
21	FLL	Fort Lauderdale/Hollywood Intl	2.58%	11,410,264
22	IAD	Washington Dulles International	2.80%	11,102,211
23	BWI	Baltimore-Washington Intl	2.41%	10,961,177
24	SLC	Salt Lake City Intl	2.51%	9,687,294
25	MDW	Chicago Midway	2.70%	9,151,057
26	DCA	Ronald Reagan Washington National	1.18%	9,065,365
27	HNL	Honolulu Intl	1.75%	8,634,009
28	SAN	San Diego Intl-Lindbergh Field	2.39%	8,473,093
29	TPA	Tampa Intl	2.42%	8,170,452
30	PDX	Portland Intl	2.84%	6,806,794

Notes: (a) Rank by 2011 FAA Arrival Enplanements (including transfers); (b) FAA Terminal Area Forecast Compound Annual Growth Rates

TOP 30 AIRPORTS:
When One Day a Week Feels Like the Wednesday Before Thanksgiving



TOP 30 AIRPORTS:
When Two Days a Week Feel Like the Wednesday Before Thanksgiving



U.S. TRAVEL
ASSOCIATION

1100 New York Avenue, NW, Suite 450 • Washington, DC 20005-3934
TEL 202 408 8422 • ustravel.org