



**Louis Armstrong New Orleans International Airport (MSY)  
Airline Competition Plan Update No. 1**

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Federal Aviation Administration

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## OVERVIEW

On February 15, 2013, Louis Armstrong New Orleans International Airport (“MSY”) submitted its Airline Competition Plan (“Plan”) in accordance with the Wendell H. Ford Aviation Investment and Reform Act for the 21st Century (“AR-21”), Section 155, and applicable Federal Aviation Administration (“FAA”) Program Guidance. MSY received approval for the initial Plan on June 28, 2013 from the FAA. In accordance with 49 USC § 47107(a)(15), the Plan was made available to the public by posting on MSY’s website under “Public Notice Advertisement.” Below is a direct link to the posting:

[http://www.flymsy.com/Files/Publications/MSY\\_Airline\\_Competition\\_Plan\\_2013.pdf](http://www.flymsy.com/Files/Publications/MSY_Airline_Competition_Plan_2013.pdf)

MSY prepared this first update to its approved Plan to provide updated information about MSY, its physical properties, use of facilities and explains how airport management continues its commitment and actions to provide new entrant access and expansion by incumbent carriers.

MSY is identified by the FAA as a medium hub airport. MSY now hosts thirteen (13) air carriers and two (2) all-cargo carriers (December 2014). There are currently 45 nonstop destinations available for booking from MSY. MSY fosters and strongly encourages airline competition and accommodates new entrant carriers. No one carrier dominates the market; however, Southwest Airlines and Delta Air Lines enplanements accounted for 62.9% in 2013. In the past four years, MSY has seen eight (8) new carriers announce service.

MSY has approximately 1.2 million square feet of terminal space, with four (4) concourses. There are a total of forty-two (42) gates, including six (6) on Concourse C with direct Federal Inspection Service (FIS) access. In 2010, Concourse A closed, but the concourse has been maintained and can be reactivated for commercial air service. The following is a breakdown of the number of gates and airlines operating in each concourse:

<b>Concourse A</b>	<b>Concourse B</b>	<b>Concourse C</b>	<b>Concourse D</b>
6 gates	10 gates	14 gates	12 gates
(currently vacant)	AirTran	American	Delta
	Southwest	Frontier	United
		JetBlue	Air Canada
		Spirit	
		US Airways	
		Alaska	
		Allegiant (2/2015)	

The average number of daily departures (1H2014) is approximately 137. There are no slot restrictions, curfews or other constraints on air operations.

MSY policies provide a fertile environment for airline competition. Since 2010, MSY has significantly decreased its cost per enplanement (CPE) paid by the airlines. Just as other airports, MSY offers incentives consistent with Federal law and FAA policies to attract new airlines and to encourage incumbent airline growth to new destinations.

The following factors demonstrate the lack of barriers to new entrant and incumbent airlines desiring growth at MSY:

A. The lack of barriers:

- No slot restrictions.
- No significant aircraft delays.
- Declining airline costs per enplanement.

B. Airport space available:

- Thirty-two (32) agent positions and multiple options for offices.
- Thirteen (13) jet bridges and hold rooms are non-preferential, available for lease by airlines, not including seven gates with no jet bridges currently in place.

C. Significant level of existing competition:

- Approximately 46.5% (Year Ending December, 2013) of capacity operated by low-cost carriers, projected to increase to 48.5% in 1Q2015.
- Consistently lower fares than the national average (Compared to top 100 passenger markets, [BTS.gov](http://BTS.gov)).

D. No complaints received from incumbent or new entrant carriers regarding denial of space prior to filing this Plan Update. Most recently, Spirit Airlines, Alaska Airlines, PEOPLExpress and Allegiant Air were provided the option of several gates and hold rooms with access to Federal Inspection Services (FIS), ticket counters, and office space.

# AVAILABILITY OF GATES AND RELATED FACILITIES

## A. Number of gates available at MSY by lease arrangement

MSY has four (4) concourses with a total of forty-two (42) gates. Thirty-five (35) gates (Concourses B, C and D) have passenger jet bridges and six (6) gates on Concourse A and one (1) gate on Concourse B do not have passenger jet bridges. While the seven gates do not have jet bridges, MSY has an approved PFC project to acquire jet bridges; and, if so acquired for any of these seven gates, they would only be leased on a preferential use or common use basis.

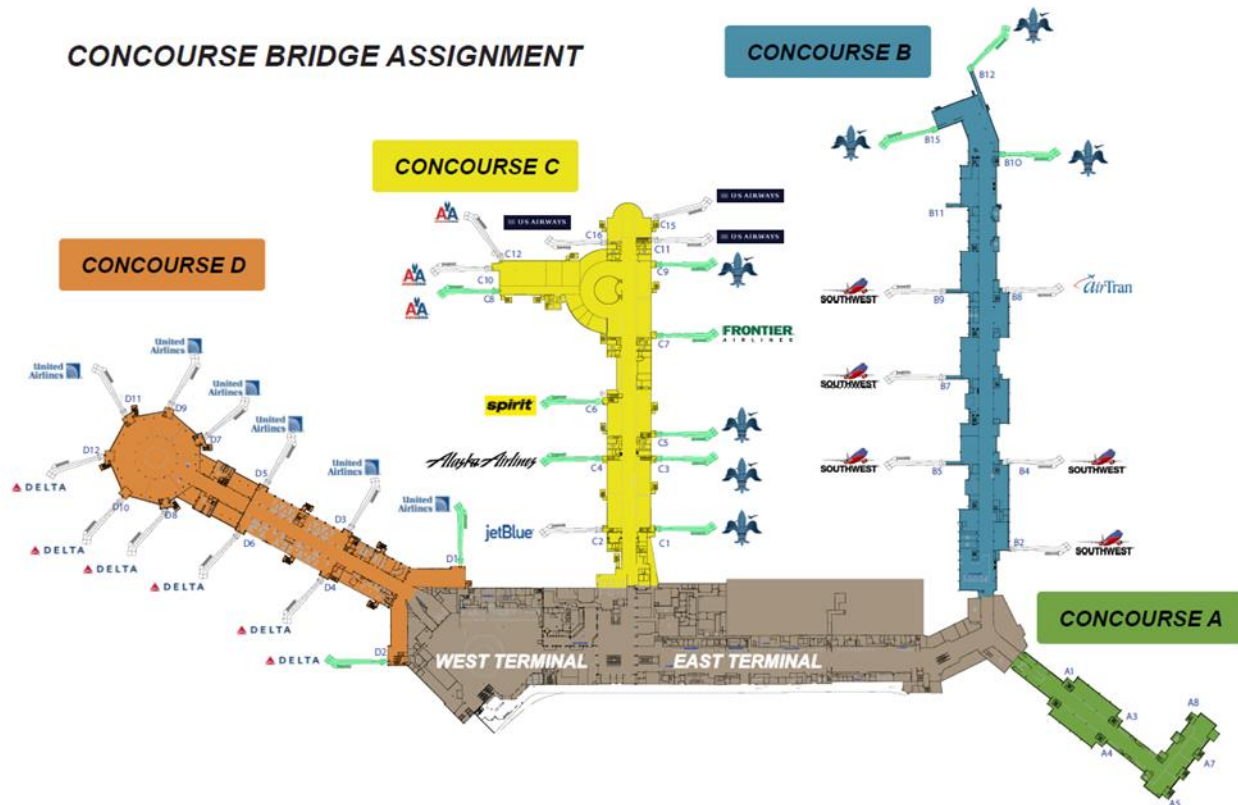
As of December 2014, the allocation of the gates is as follows:

1. Fifteen (15) gates with MSY-owned jet bridges are under preferential leases to signatory airlines. Since approval of the Plan, the following changes in gate use has occurred:
  - a. U.S. Airways has consolidated operations with American in Concourse C. The new American (combined operations) now leases a total of five (5) gates.
  - b. Southwest Airlines has begun leasing one additional gate on Concourse B (Gate B2), where they also RON.
2. Seven (7) gates are under preferential leases to signatory airlines that also own the associated jet bridge on the particular leased gate(s).
3. Three (3) gates with MSY-owned jet bridges are under a common use (non-signatory) lease with airlines. Since MSY's approval of its Airline Competition Plan, C8 has been recaptured and used on a common-use, per turn basis. In February 2015, Allegiant Air will begin its operations at MSY using a common-use gate, raising this to a total of four (4) gates used on a common use basis.
  - a. Frontier Airlines has been relying on a common use gate since June 2010, averaging less than two average daily flights. The use of this common use gate has not created an impediment to the Frontier Airlines schedule.
  - b. Air Canada has been relying on United's leased gate since October 2010, averaging one daily flight. The shared gate has not created an impediment to the Air Canada schedule.
  - c. Spirit Airlines continues to use a common use gate, and has grown its operations from one (1) daily flight to five (5) daily flights. Spirit Airlines recently expressed interest in becoming a signatory airline and preferentially leasing a gate.
4. Thirteen (13) gates with Airport-owned jet bridges are available for use or lease (either on a common use or preferential use basis) by airlines. As noted in 3 above,

three (3) of these gates on Concourse C are being used on a common use basis by non-signatory airlines (Spirit, Alaska and Frontier Airlines) and one is being used on a “per turn” basis by American Airlines. Beginning February 2015, one gate on Concourse C will be used on a common use basis by the non-signatory airline, Allegiant Air. The two (2) common use gates on Concourse D are being used on a “per turn” basis, one by Delta Air Lines and one by United Airlines.

5. Six (6) gates without jet bridges on Concourse A and one (1) on Concourse B are available for use or lease by airlines.

Below is a depiction of the gates at MSY as of November 2014. The jet bridges highlighted in green are MSY’s common-use gates. Those gates identified with MSY’s “fleur de lis” logo are gates that are not leased or used by any airline.



## B. Gate-use monitoring policy

MSY Operations Department is staffed with no less than one (1) Operations Supervisor 24-hours a day / 365-days a year. The Operations Supervisors monitor use of the thirteen (13) gates with jet bridges that are not leased to any airline as well as the common use gates leased to non-signatory airlines. The Operations Supervisors have the authority to permit use of any of these available gates at the request of any carrier on a first come, first serve basis. In addition, Operations Supervisors are charged with implementation of the US Department of Transportation approved MSY Emergency Contingency Plan for

irregular operations. As of the submission of this Plan Update, MSY has been able to accommodate all airline requests for additional gates, including charters, airline RONS and diverted aircraft. In addition, MSY is able to accommodate any request by a potential new entrant airline seeking gate space. MSY will consider a plan to monitor leased gates in the event that MSY gate capacity becomes constrained.

**C. Differences, if any, between gate-use monitoring policy at PFC-financed facilities, facilities subject to PFC assurance #7, and other gates.**

No change since the last Plan approval.

**D. Description of the process for accommodating new service and for service by a new entrant.**

New service through an incumbent carrier is accommodated through a gate already leased or assigned on a common-use basis. If an additional gate is required then one will be assigned on a vacant gate of their choice. A new entrant carrier is provided a walk-through of the terminal and any vacant space may be chosen accordingly, including ticketing, office, and gate space. Incentives are also available for new non-stops and new entrant carriers. The Airport uses objective standards by recognizing the flight requirements of any requesting Airline. There are thirteen (13) vacant gates with jet bridges available for lease (common use or preferential use) or use on a per turn basis, five (5) of which can accommodate International flights, including three (3) capable of wide-body aircraft. If in the unlikely event the Airport has no available gates for the requesting Airline, the following objective standards used include, but are not limited to: international flight requirements and Customs, TSA screening, aircraft wing span and height requirements, fueling requirements, scheduling, ground equipment required for specific aircraft type, personnel training, and alliance and code sharing synergies. The Airport Operations Department will identify these and allocate a gate accordingly.

**E. Has the PFC competitive assurance #7 operated to convert previously exclusive gates to preferential-use gates or has it caused such gates to become available to other users?**

No change since the last Plan approval.

**F. Gate Utilization (departures/gate) per week and month**

In December 2014, approximately 1,046 flights per week were scheduled to depart from MSY. With 28 of the available 42 gates being used on a daily basis, airport-wide utilization per gate in December 2014 was 37 flights per week and 149 per month. The following table below shows the full year average for gate utilization by operating carrier in 2013.

## Full Year Ending December 2013 Gate Utilization

Airline	Number of Departures	Number of Gates <sup>1</sup>	Daily Turns per gate
Endeavor Air	1,257		
Compass Airlines Inc.	294		
Delta Air Lines	6,628		
ExpressJet Airlines	530		
SkyWest Airlines	194		
Chautauqua Airlines Inc.	69		
Shuttle America	5		
<b>Combined Operations</b>	<b>8,977</b>	<b>6</b>	<b>4.1</b>
Frontier Airlines	372		
Republic Airline	1		
<b>Combined Operations</b>	<b>373</b>	<b>1</b>	<b>1.0</b>
ExpressJet Airlines	1,719		
GoJet Airlines LLC	687		
SkyWest Airlines	457		
Chautauqua Airlines Inc.	198		
Shuttle America	886		
United Airlines	5,059		
Mesa Airlines	4		
Jazz Air	339		
<b>Combined Operations</b>	<b>9,349</b>	<b>6</b>	<b>4.3</b>
PSA	3		
US Airways	2,416		
Mesa Airlines	247		
Republic Airline	2,507		
Air Wisconsin Airlines	4		
American Airlines	3,696		
Envoy Air Inc	635		
Republic Airline	455		
<b>Combined Operations</b>	<b>9,963</b>	<b>6</b>	<b>4.5</b>
AirTran Airways	1,833		
Southwest Airlines	16,867		
<b>Combined Operations</b>	<b>18,700</b>	<b>6</b>	<b>9</b>
<b>JetBlue Airways</b>	<b>1,437</b>	<b>1</b>	<b>3.94</b>
<b>Spirit Airlines</b>	<b>342</b>	<b>1</b>	<b>0.94</b>
<b>TOTAL MSY</b>	<b>49,480</b>	<b>27<sup>2</sup></b>	<b>5</b>

<sup>1</sup>American, Delta, and United utilize one gate on a per turn basis

<sup>2</sup>Alaska Airlines began service June 2014, not included in Full Year 2013 statistics

Source: Diio Mi, New Orleans Aviation Board



**G. Number of carriers in the past year that have requested access or sought to expand, how they were accommodated, and the length of time between any requests and access**

Since FAA approval of the Plan, Alaska Airlines has begun nonstop service to Seattle, WA, the longest transcontinental nonstop currently scheduled from MSY. Southwest has expanded options to include new non-stops to Austin, TX, San Diego, CA, San Antonio, TX, Oakland, CA and Washington, D.C. Spirit Airlines expanded service to include nonstop service to Chicago, IL, Dallas, TX, Detroit, MI, Ft. Lauderdale, FL and Houston, TX. A startup airline, PEOPLEExpress began the first nonstop service between MSY and Newport News/Williamsburg, VA in August 2014. VacationExpress has added an international nonstop to Punta Cana, Dominican Republic and expanded the frequency of Cancun, Mexico from one weekly to three weekly for the upcoming year. Delta Air Lines has also implemented a weekly nonstop to Cancun, Mexico with once weekly service starting in February 2015. Similarly, United Airlines will be launching a weekly nonstop route to Cancun, Mexico starting in May 2015. Ultra low-cost carrier Allegiant Air had a major announcement in November 2014 announcing nonstop service to four destinations, including Indianapolis, IN, Columbus-Rickenbacker, OH, Orlando-Sanford, FL and Cincinnati, OH. We have been able to immediately accommodate each airline that has requested terminal space and gates upon their request.

**H. Description of process to resolve any access complaints by a new entrant or an air carrier seeking to expand service**

No change since the last Plan approval.

**I. Use/lose or use/share policies for gates and other facilities**

No change since the last Plan approval.

**J. Policy regarding “recapturing” gates that are not being fully used**

No change since the last Plan approval.

**K. Plans to make gates and related facilities available to new entrant air carriers that want to expand service at MSY; methods of accommodating new gate demand by air carriers at MSY (common-use, preferential-use, or exclusive-use gates); and length of time between when an air carrier initially contacts MSY and could begin operations**

MSY actively pursues new entrant airlines and can adequately accommodate the needs of new and existing carriers. In February 2014, Alaska Airlines was a new entrant carrier seeking a common-use gate for their daily flight to Seattle, WA. Alaska was provided several options for gate, ticketing counters, and office spaces for their operation. PEOPLEExpress was offered multiple options. Allegiant Air will take advantage of an office and common-use ticket counters when they commence operations in February 2015.

**L. Availability of an airport competitive access liaison to assist requesting carriers, including new entrants**

MSY has dedicated staff to market and promote air service and present business cases to key airline planners, including familiarizing new carriers with MSY, terminal space availability and ensuring incumbent and new entrants are aware of promotional incentives. Any concerns regarding access should be reported to the Air Service Manager, Business Development Officer or the Deputy Director and Chief Operations Officer.

**M. Number of aircraft remain overnight (RON) positions available at the airport by lease arrangement, i.e. exclusive, preferential, common-use or unassigned, and distribution by carrier. Describe procedures for monitoring and assigning RON positions and for communicating availability of RON positions to users.**

No change since the last Plan approval.

**1.) Procedures for Assigning and Communicating Available RON Positions**

No change since the last Plan approval.

**2.) Monitoring Procedures**

No change since the last Plan approval.

## **LEASING AND SUBLEASING ARRANGEMENTS**

**A. Is a subleasing agreement with an incumbent carrier necessary to obtain access?**

No change since the last Plan approval.

**B. How MSY assists requesting airlines obtain a sublease?**

No change since the last Plan approval.

**C. Airport policies regarding sublease fees (e.g., no more than 15 percent above the standard airport-determined fee).**

No change since the last Plan approval.

**D. Airport oversight policies for sublease fees and ground handling arrangements.**

Under the Airline-Airport Use and Lease Agreement, Airlines must request permission from the Director of Aviation to sublease their preferential areas. Included in the request, a copy of the proposed sublease agreement and rental fees are sent for review by MSY.

MSY will use best efforts to negotiate inclusion of fee limitation language in its next Airline Airport Use and Lease Agreement. To date, we have not had an airline raise concerns about sublease fees. If we were to receive such notification, we would review the fees being charged and interject accordingly, if necessary, to amicably resolve the matter.

**E. Are formal arrangements in place to resolve disputes among air carriers regarding the use of airport facilities?**

In addition to direct one-on-one communication with the airlines, MSY sponsors an Airport-Airline Affairs Committee (“AAAC”) as a primary vehicle for airlines to resolve any disputes in regard to airport facilities. MSY hosts airline station managers meetings as an additional means to identify any issues or concerns in regard to use of MSY facilities. MSY is considering development of a formal procedure to resolve disputes among air carriers, as we are committed to eliminating any impediments to competition.

**F. How complaints by subtenants about excessive sublease fees or unneeded bundling of services are resolved?**

No change since the last Plan approval.

**G. How independent contractors who want to provide ground handling, maintenance, fueling, catering or other support services but have been unable to establish a presence at MSY are accommodated?**

Signatory air carriers may perform aircraft handling and servicing with their own employees or by contracting for their services directly with a ground handling company of their choice. In addition, MSY has eight independent and contractible companies on-site to provide on-call ground handling. Alaska Airlines and PEOPLExpress expressed interest in ground handlers not currently providing services at MSY. The Airport worked with Menzie’s Aviation and QuickFlight Services to obtain Board approval for ground handling permits so they may conduct business at MSY. A ground handler wishing to conduct business at the Airport will contact the Manager of Properties to obtain information on insurance requirements and vacant terminal spaces.

**H. Copies of lease and use agreements in effect.**

No change since the last Plan approval.

## **PATTERNS OF AIR SERVICE**

**A. Number of Markets Served**

As of December 2014, MSY has nonstop service to 42 domestic and 3 international destinations.

**B. Nonstop Markets and Flight frequency**

CY 2013-2014 (including announcements for 2015 service)

	Domestic	International
Number of markets served nonstop	42	3
Average number of flights per day	134	1
Number of markets served by low-cost carriers	27	
Number of markets served by one carrier	25	1
Number of new markets in 2013-2014	12	2
Number of previously served markets dropped since filing	5	1

## GATE ASSIGNMENT POLICY

- A. Gate assignment policy and method of informing existing carriers and new entrants of this policy. This would include standards and guidelines for gate usage and leasing, such as security deposits, minimum usage, if any, fees, terms, master agreements, signatory and non-signatory requirements.**

Each airline considering service at MSY is provided a presentation, including a hard copy entailing general airport information, gates available preferential or common use, contacts for on-site ground handlers, rates and charges, and signage requirements. Incumbent carriers have either preferential or common use gates. With thirteen available common-use gates with jet bridges, requests are accommodated on a first come, first serve basis.

- B. Methods for announcing to tenant carriers when gates become available.**

No change since the last Plan approval.

- C. How announcements are made to tenant air carriers when gates become available. Do all tenant air carriers receive information on gate availability and terms and conditions by the same process at the same time?**

No change since the last Plan approval.

- D. New policies that have been adopted or actions that have been taken to ensure that new entrant carriers have reasonable access to MSY and that incumbent carriers can expand their operations.**

There are currently thirteen (13) available gates with jet bridges available for incumbent or new entrant carriers. There are seven (7) available gates on Concourse A with no jet bridges that can be activated if additional space is needed by any carrier, new or existing.

Airport staff closely monitors gate utilization and availability in order to accommodate all requests.

## **GATE USE REQUIREMENTS**

- A. Gate use monitoring policy, including schedules for monitoring, basis for monitoring activity (i.e., airline schedules flight information display systems, etc.), and the process for distributing the product to interested carriers.**

MSY Operations staff monitors gates on a daily basis with information from the airline station managers, handlers and their daily observations. If capacity were to become constrained, Operations staff would also utilize daily flight schedules. Tenants must request permission prior to use and staff assigns gates accordingly on a first come first serve basis.

- B. Requirements for signatory status and identity of signatory carriers.**

No change since the last Plan approval.

- C. Where applicable, minimum use requirements for leases (i.e., frequency of operations, number of seats, etc.).**

Currently, to become Signatory an Air Transportation Company must provide passenger service with at least two daily departures, lease at least 2,500 square feet of terminal space, and execute an agreement with MSY. MSY is negotiating the terms of a new Use and Lease Agreement with the airlines. In principal, MSY and the airlines have agreed to include an increased utilization requirement provision (as recommended by the FAA in its 2013 Plan approval) to a minimum of four (4) scheduled turns per day for each preferential gate.

- D. The priorities, if any, employed to determine carriers that will be accommodated through forced sharing or sub-leasing arrangements. Describe how these priorities are communicated to interested carriers.**

No change since the last Plan approval.

- E. Justifications for any differences in gate use requirements among tenants.**

No change since the last Plan approval.

- F. Usage policies for common-use gates, including where applicable, a description of priorities for use of common-use gates. Explain how these priorities are communicated to interested carriers.**

No change since the last Plan approval.

- G. Methods for calculating rental rates or fees for leased and common-use space. Where applicable, provide an explanation of the basis for disparities in rental fees for common-use versus leased gates.**

No change since the last Plan approval.

## **FINANCIAL CONSTRAINTS**

- A. The major source of revenue at MSY for terminal projects.**

No change since the last Plan approval.

- B. Rates and charges methodology (residual, compensatory, or hybrid).**

No change since the last Plan approval.

- C. Past use, if any, of PFC's for gates and related terminal projects.**

No change since the last Plan approval.

- D. Availability of discretionary income for airport capital improvements.**

No change since the last Plan approval.

## **AIRPORT CONTROLS OVER AIRSIDE AND GROUND SIDE CAPACITY**

- A. Majority-in-interest (MII) or “no further rates and charges” clauses covering groundside and airside projects**

The current Airport-Airline Use and Lease Agreements contain a Majority-in-interest (MII) provision.

- B. List capital construction projects that have been delayed or prevented because an MII was invoked**

None.

- C. Plans to modify existing MII agreements**

The existing Use and Lease Agreement with the airlines will be extended for a period of one year to expire December 31, 2015. This extension is necessary to complete the negotiations of the terms of a new Use and Lease Agreement with the airlines. In

principal, MSY and the airlines have agreed to a modified MII provision that will not interfere with MSY's approved Plan and will be consistent with the FAA's intent and guidance provided to MSY in connection with the 2013 approval of the Plan. Further, it was agreed in principal that MII will not be required for any airport project less than \$3 million in any one year and not to exceed a total \$10 million for projects over any five year period.

## **AIRPORT INTENTIONS TO BUILD OR ACQUIRE GATES TO BE USED AS COMMON FACILITIES**

### **A. The number of common-use gates available at MSY today.**

Thirteen gates with jet bridges are available for common-use or preferential leasing.

### **B. The number of common-use gates MSY intends to build or acquire and timeline. Intended financing.**

The New Orleans Aviation Board is in the "design development" phase for a new terminal replacement facility that is planned to open in 2018. The new "North Terminal" is a \$650 million project that will include an approximate 650,000 square foot terminal containing two (2) concourses, Federal Inspection Service (FIS) and thirty (30) gates, and such other associated terminal facilities. As part of the planning efforts, there is identified space to allow for an expansion of the terminal to accommodate twelve (12) additional gates (for a total of forty-two (42) gates). All aspects of this project have been thoroughly coordinated with all stakeholders, including the airlines, FAA, U.S. Transportation Security Administration, U.S. Customs and Border Patrol. The sources of funding include FAA Airport Improvement Program grants, TSA grants, Louisiana State Aviation Trust Fund grants, PFC collections, and General Airport Revenue Bonds.

### **C. Are any air carriers that have been serving MSY for more than three years relying exclusively on common use gates?**

Frontier has been using a common-use gate since 2010 with their low frequency seasonal nonstop flight to Denver, Colorado. The use of this gate has not impeded growth plans and allows for MSY to maintain service by Frontier by using a common use gate for their seasonal service.

### **D. Whether common-use gates will be constructed in conjunction with gates leased through exclusive or preferential-use arrangements.**

The North Terminal will have 30 gates in 2018. There will be a combination of common use and airline preferential leased gates, with the exact numbers determined when the design is complete.

**E. Whether gates being used for international service are available for domestic service.**

No change since the last Plan approval.

**F. Do air carriers that only serve domestic markets now operate from international gates?**

No change since the last Plan approval.

## **AIRFARE COMPARISON**

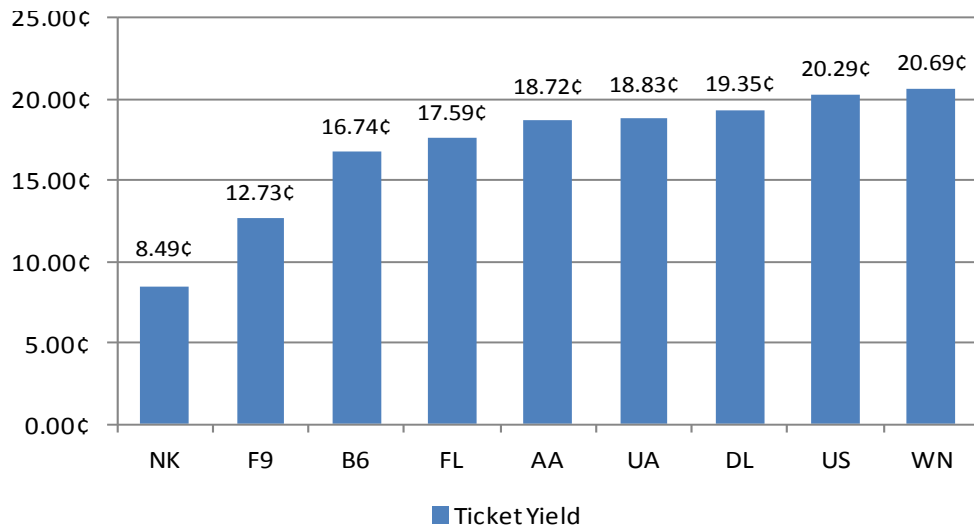
Average airfares cannot be directly compared to each other at a single airport due to the differences in stage length, or miles flown, by each passenger. Therefore, it is appropriate to compare the airfare on a miles flown basis in order to truly understand the differences between the carrier fares at MSY.

When compared on a per mile basis, it is clear that there is an excellent competitive balance at MSY among the incumbent air carriers. The range, between 8.49 – 20.69 cents for Calendar Year (“CY”) 2013, is an acceptable range which encourages healthy competition among the carriers. For example, United Airlines captured approximately 16% of the passenger share at MSY in CY 2013, but its average ticket yield is in the middle of the range at 18.83 cents. Southwest Airlines, whose average fare is among the lowest of the incumbent carriers at MSY at \$173.31, has the highest ticket yield of 20.69 cents. This is due to the fact that the average ticket miles flown for a Southwest passenger at MSY are the lowest of all carriers, at 838 miles. Therefore, when the fare is adjusted on a per mile basis the result is the highest ticket yield, but still quite competitive.

MSY welcomed the entrance of Spirit Airlines into the air service picture in January 2013. This is another positive development for competitive balance at MSY, as Spirit Airlines “ultra-low cost carrier” strategy is one that stimulates demand based on low fares, thereby forcing other legacy and low cost carriers to compete for these price conscious passengers. As the table indicates, Spirit’s ticket yield, 8.49 cents, was indeed the lowest during CY 2013 at MSY. In CY 2015, MSY will welcome another ultra-low cost carrier, Allegiant Air, which will further enhance the competitive balance at MSY.

### **MSY Ticket Yield by Carrier Comparison CY 2013**





Source: Aviation DataMiner™ analysis of DOT/BTS O&D Survey

### MSY Airfares vs. Comparison Airports

MSY ranked #37 in overall enplanements during CY 2013, a 6.6% increase over CY 2012. Based on the current ranking of MSY, airports that generated similar levels of enplanements for CY 2013 have been compared to MSY for the purposes of the airfare comparison. The airports chosen for this comparison are as follows:

- Kansas City International Airport (MCI)
- Raleigh-Durham International Airport (RDU)
- Pittsburgh International Airport (PIT)

Rank	FAA Region	State	Locid	City	Airport Name	Arpt Category	Hub	CY 13 Enplanements	CY 12 Enplanements	% Change
35	CE	MO	MCI	Kansas City	Kansas City International	P	M	4,836,221	4,866,850	-0.6%
37	SW	LA	MSY	Metairie	Louis Armstrong New Orleans International	P	M	4,576,539	4,293,624	6.6%
39	SO	NC	RDU	Raleigh	Raleigh-Durham International	P	M	4,482,016	4,490,374	-0.2%
46	EA	PA	PIT	Pittsburgh	Pittsburgh International	P	M	3,812,460	3,892,338	-2.1%

Source: [http://www.faa.gov/airports/planning\\_capacity/passenger\\_allcargo\\_stats/passenger/](http://www.faa.gov/airports/planning_capacity/passenger_allcargo_stats/passenger/)

When comparing the ticket yield trends at MSY to its similar sized peer airports over the last three years, it is evident that the air carriers at MSY operate in a very competitive and fair environment. When compared to similar sized airports (MCI, RDU, and PIT), MSY had the lowest percent increase in year-over-year yield increase between 2013 and 2012. Furthermore, the average yield of 19.39 cents in CY 2013 is very competitive with the peer airports.

**MSY vs. Similar Sized Airports Ticket Yield Trend**  
 Three Year Trend: 2011 – 2013

<b>Airport</b>	<b>CY 2011</b>	<b>CY 2012</b>	<b>CY 2013</b>	<b>12 vs '11 YOY % Increase</b>	<b>13 vs '12 YOY % Increase</b>
<b>MSY</b>	17.29¢	18.96¢	19.39¢	9.7%	2.3%
<b>MCI</b>	17.15¢	17.97¢	19.08¢	4.8%	6.2%
<b>RDU</b>	18.05¢	19.02¢	19.54¢	5.4%	2.7%
<b>PIT</b>	16.83¢	18.24¢	19.20¢	8.4%	5.3%

*Source: Aviation DataMiner™ analysis of DOT/BTS O&D Survey*

**MSY Top 25 O&D Markets: Yield/Airfare Comparison**

In addition to analyzing the overall yields at MSY versus the similar sized airports, it is instructive to examine the yields in the MSY Top 25 Origination and Destination (“O&D”) markets as compared to the same markets at the comparison airports. As is shown in the table below, MSY has very competitive yields to its Top 25 O&D markets compared to MCI, RDU, and PIT.

Rank	MSY				MCI				RDU				PIT			
	Market	P_sgr	Net OW Fare	Ticket Yield	Market	P_sgr	Net OW Fare	Ticket Yield	Market	P_sgr	Net OW Fare	Ticket Yield	Market	P_sgr	Net OW Fare	Ticket Yield
1	HOU	380,032	\$153.81	50.82¢	HOU	130,239	\$197.22	28.93¢	HOU	65,307	\$208.18	19.27¢	HOU	56,584	\$201.72	16.66¢
2	ATL	341,364	\$139.77	32.23¢	ATL	289,661	\$170.59	23.71¢	ATL	398,605	\$135.03	37.75¢	ATL	292,677	\$160.89	29.81¢
3	LAX	320,047	\$258.98	14.95¢	LAX	265,393	\$200.37	14.17¢	LAX	239,823	\$221.18	9.76¢	LAX	165,449	\$270.79	12.08¢
4	LGA	293,444	\$189.07	15.36¢	LGA	189,049	\$268.87	23.02¢	LGA	479,321	\$143.25	32.29¢	LGA	281,173	\$211.04	62.80¢
5	DAL	284,734	\$138.76	31.45¢	DAL	240,242	\$151.95	32.80¢	DAL	29,694	\$174.11	14.14¢	DAL	12,380	\$202.94	15.99¢
6	DEN	247,740	\$159.43	14.47¢	DEN	462,776	\$113.69	21.11¢	DEN	183,843	\$200.02	12.92¢	DEN	163,900	\$235.05	17.16¢
7	IAH	238,987	\$173.68	56.79¢	IAH	80,719	\$251.59	37.50¢	IAH	87,536	\$245.88	23.13¢	IAH	178,849	\$291.08	25.03¢
8	MCO	237,250	\$157.10	25.76¢	MCO	271,731	\$177.60	15.66¢	MCO	271,373	\$131.21	23.35¢	MCO	419,985	\$140.95	16.45¢
9	BWI	235,675	\$190.88	18.32¢	BWI	160,455	\$189.52	18.69¢	BWI	206,336	\$130.32	50.77¢	BWI	68,608	\$125.30	57.46¢
10	JFK	233,321	\$199.70	16.80¢	JFK	20,527	\$244.38	20.09¢	JFK	237,007	\$130.81	30.20¢	JFK	63,191	\$170.32	48.39¢
11	EWR	218,137	\$207.17	17.08¢	EWR	125,091	\$281.27	24.83¢	EWR	153,589	\$221.35	47.83¢	EWR	112,464	\$260.04	79.11¢
12	DFW	210,156	\$110.06	24.24¢	DFW	182,158	\$148.66	31.81¢	DFW	191,942	\$230.64	21.40¢	DFW	194,427	\$232.96	20.61¢
13	DCA	198,993	\$226.96	22.75¢	DCA	202,687	\$163.19	16.51¢	DCA	120,050	\$215.12	93.84¢	DCA	50,245	\$161.62	78.04¢
14	PHL	192,994	\$202.26	17.40¢	PHL	160,330	\$188.08	16.86¢	PHL	236,807	\$175.82	51.47¢	PHL	163,593	\$242.62	87.74¢
15	TPA	181,137	\$142.18	26.22¢	TPA	140,581	\$195.45	17.27¢	TPA	178,325	\$149.99	24.24¢	TPA	269,540	\$142.07	15.72¢
16	BOS	179,528	\$199.25	13.68¢	BOS	146,818	\$202.48	15.34¢	BOS	417,898	\$140.00	22.50¢	BOS	332,086	\$125.43	24.84¢
17	SFO	177,310	\$283.11	14.06¢	SFO	135,528	\$238.28	15.17¢	SFO	188,893	\$286.39	11.60¢	SFO	147,095	\$287.25	12.02¢
18	LAS	158,561	\$210.55	13.27¢	LAS	285,298	\$178.68	14.96¢	LAS	148,718	\$222.73	10.53¢	LAS	255,797	\$189.09	9.43¢
19	ORD	154,904	\$230.39	24.52¢	ORD	232,355	\$158.06	38.67¢	ORD	276,047	\$177.24	26.33¢	ORD	228,174	\$161.41	37.87¢
20	MDW	151,430	\$190.76	22.27¢	MDW	337,962	\$141.65	34.63¢	MDW	166,136	\$147.85	22.31¢	MDW	187,476	\$132.72	32.92¢
21	BNA	148,807	\$138.15	27.78¢	BNA	144,860	\$135.17	25.60¢	BNA	193,887	\$121.76	26.38¢	BNA	60,474	\$160.60	23.46¢
22	FLL	131,711	\$173.60	22.58¢	FLL	166,118	\$163.31	12.23¢	FLL	184,700	\$127.29	16.56¢	FLL	192,090	\$153.86	14.80¢
23	MIA	126,069	\$178.38	24.85¢	MIA	37,340	\$201.80	13.87¢	MIA	147,707	\$134.89	18.41¢	MIA	77,704	\$162.52	15.10¢
24	DTW	120,684	\$194.65	19.63¢	DTW	120,360	\$264.55	38.05¢	DTW	118,623	\$210.94	36.60¢	DTW	26,061	\$319.96	156.90¢
25	PHX	110,975	\$204.33	13.96¢	PHX	279,098	\$182.71	16.58¢	PHX	118,815	\$218.04	11.15¢	PHX	163,936	\$223.12	11.85¢

## CY 2013 Comparison

MSY					
Carrier	CY 2013 O&D Pax	CY 2013 Pax Share %	CY 2013 Avg. Net One Way Fare	CY 2013 Ticket Yield	CY 2013 Avg. Ticket Miles
AA	682,582	8.3%	\$198.54	18.72¢	1,061
B6	241,148	2.9%	\$207.75	16.74¢	1,241
DL	1,645,161	20.1%	\$211.00	19.35¢	1,090
F9	131,972	1.6%	\$170.72	12.73¢	1,341
FL	125,760	1.5%	\$149.35	17.59¢	849
NK	72,341	0.9%	\$57.57	8.49¢	678
UA	1,303,738	15.9%	\$228.32	18.83¢	1,213
US	784,514	9.6%	\$222.13	20.29¢	1,095
WN	3,193,554	39.0%	\$173.31	20.69¢	838
<b>Total</b>	<b>8,181,002</b>	<b>100.0%</b>	<b>\$196.45</b>	<b>19.39¢</b>	<b>1,013</b>

MCI					
Carrier	CY 2013 O&D Pax	CY 2013 Pax Share %	CY 2013 Avg. Net One Way Fare	CY 2013 Ticket Yield	CY 2013 Avg. Ticket Miles
AA	696,590	8.2%	\$174.45	19.28¢	905
AS	95,933	1.1%	\$218.53	12.39¢	1,764
DL	1,528,169	17.9%	\$214.24	20.94¢	1,023
F9	515,276	6.0%	\$133.34	14.21¢	938
FL	112,272	1.3%	\$163.64	15.52¢	1,054
UA	928,016	10.9%	\$217.00	20.60¢	1,053
US	713,109	8.4%	\$213.78	17.16¢	1,246
WN	3,947,660	46.2%	\$171.62	19.37¢	886
<b>Total</b>	<b>8,537,373</b>	<b>100.0%</b>	<b>\$186.59</b>	<b>19.08¢</b>	<b>978</b>

RDU					
Carrier	CY 2013 O&D Pax	CY 2013 Pax Share %	CY 2013 Avg. Net One Way Fare	CY 2013 Ticket Yield	CY 2013 Avg. Ticket Miles
AA	1,194,370	15.0%	\$197.05	17.94¢	1,098
B6	417,288	5.3%	\$137.92	20.66¢	668
DL	2,220,830	28.0%	\$187.89	20.31¢	925
F9	86,638	1.1%	\$118.66	26.57¢	447
FL	157,006	2.0%	\$138.27	17.54¢	788
UA	752,852	9.5%	\$236.94	18.90¢	1,253
US	1,166,402	14.7%	\$193.73	24.64¢	786
WN	1,941,357	24.5%	\$164.77	17.20¢	958
<b>Total</b>	<b>7,937,663</b>	<b>100.0%</b>	<b>\$185.03</b>	<b>19.54¢</b>	<b>947</b>

PIT					
Carrier	CY 2013 O&D Pax	CY 2013 Pax Share %	CY 2013 Avg. Net One Way Fare	CY 2013 Ticket Yield	CY 2013 Avg. Ticket Miles
AA	523,958	7.6%	\$222.13	16.92¢	1,313
B6	190,095	2.8%	\$119.29	20.81¢	573
DL	1,196,345	17.5%	\$214.03	23.47¢	912
F9	177,836	2.6%	\$167.73	29.13¢	576
FL	268,723	3.9%	\$149.91	16.01¢	937
UA	1,120,451	16.3%	\$244.93	18.57¢	1,319
US	1,558,078	22.7%	\$208.97	23.16¢	902
WN	1,817,699	26.5%	\$163.96	14.94¢	1,098
<b>Total</b>	<b>6,854,516</b>	<b>100.0%</b>	<b>\$199.29</b>	<b>19.20¢</b>	<b>1,038</b>

## CY 2012 Comparison

MSY					
Carrier	CY 2012 O&D Pax	CY 2012 Pax Share %	CY 2012 Avg. Net One Way Fare	CY 2012 Ticket Yield	CY 2012 Avg. Ticket Miles
AA	685,117	8.8%	\$201.51	19.10¢	1,055
B6	247,964	3.2%	\$201.27	16.22¢	1,241
DL	1,660,709	21.3%	\$201.04	18.41¢	1,092
F9	129,460	1.7%	\$180.42	14.65¢	1,231
FL	327,795	4.2%	\$138.50	15.89¢	872
UA	1,339,950	17.2%	\$221.04	17.45¢	1,266
US	702,065	9.0%	\$219.93	20.52¢	1,072
WN	2,717,035	34.8%	\$174.51	21.12¢	826
<b>Total</b>	<b>7,810,266</b>	<b>100.0%</b>	<b>\$194.15</b>	<b>18.96¢</b>	<b>1,024</b>

MCI					
Carrier	CY 2012 O&D Pax	CY 2012 Pax Share %	CY 2012 Avg. Net One Way Fare	CY 2012 Ticket Yield	CY 2012 Avg. Ticket Miles
AA	757,824	8.7%	\$171.08	18.62¢	919
AS	77,193	0.9%	\$209.26	11.93¢	1,754
DL	1,627,174	18.6%	\$202.07	19.12¢	1,057
F9	792,208	9.1%	\$134.89	13.88¢	972
FL	174,789	2.0%	\$135.82	13.67¢	993
UA	1,062,666	12.2%	\$205.95	19.19¢	1,073
US	670,782	7.7%	\$204.50	16.52¢	1,238
WN	3,573,083	40.9%	\$163.89	18.70¢	876
<b>Total</b>	<b>8,735,805</b>	<b>100.0%</b>	<b>\$177.36</b>	<b>17.97¢</b>	<b>987</b>

RDU					
Carrier	CY 2012 O&D Pax	CY 2012 Pax Share %	CY 2012 Avg. Net One Way Fare	CY 2012 Ticket Yield	CY 2012 Avg. Ticket Miles
AA	1,129,566	14.2%	\$195.84	18.29¢	1,071
B6	424,662	5.3%	\$129.88	20.49¢	634
DL	2,124,170	26.6%	\$179.62	19.22¢	935
F9	74,476	0.9%	\$154.81	27.45¢	564
FL	223,384	2.8%	\$121.21	14.80¢	819
UA	843,722	10.6%	\$227.40	18.44¢	1,233
US	1,239,118	15.5%	\$178.85	22.20¢	805
WN	1,922,574	24.1%	\$160.66	17.69¢	908
<b>Total</b>	<b>7,982,325</b>	<b>100.0%</b>	<b>\$177.64</b>	<b>19.02¢</b>	<b>934</b>

PIT					
Carrier	CY 2012 O&D Pax	CY 2012 Pax Share %	CY 2012 Avg. Net One Way Fare	CY 2012 Ticket Yield	CY 2012 Avg. Ticket Miles
AA	531,256	7.5%	\$219.10	17.22¢	1,272
B6	264,598	3.7%	\$113.76	20.48¢	555
DL	1,260,174	17.7%	\$191.14	20.48¢	933
F9	163,365	2.3%	\$135.68	27.74¢	489
FL	679,913	9.5%	\$134.74	14.71¢	916
UA	1,200,836	16.8%	\$235.86	17.38¢	1,357
US	1,616,820	22.7%	\$196.02	22.67¢	865
WN	1,404,043	19.7%	\$167.23	14.52¢	1,152
<b>Total</b>	<b>7,130,543</b>	<b>100.0%</b>	<b>\$187.80</b>	<b>18.24¢</b>	<b>1,030</b>

## CY 2011 Comparison

<b>MSY</b>					
Carrier	CY 2011 O&D Pax	CY 2011 Pax Share %	CY 2011 Avg. Net One Way Fare	CY 2011 Ticket Yield	CY 2011 Avg. Ticket Miles
AA	752,457	9.7%	\$180.12	17.40¢	1,035
B6	254,493	3.3%	\$173.16	13.96¢	1,240
CO	857,489	11.0%	\$192.06	17.72¢	1,084
DL	1,627,805	20.9%	\$180.57	16.59¢	1,088
F9	278,213	3.6%	\$176.79	16.06¢	1,101
FL	356,242	4.6%	\$128.74	14.39¢	895
UA	542,536	7.0%	\$214.50	14.61¢	1,468
US	515,586	6.6%	\$197.32	18.58¢	1,062
WN	2,604,844	33.44%	\$161.93	19.42¢	834
<b>Total</b>	<b>7,790,158</b>	<b>100.0%</b>	<b>\$176.26</b>	<b>17.29¢</b>	<b>1,019</b>

<b>MCI</b>					
Carrier	CY 2011 O&D Pax	CY 2011 Pax Share %	CY 2011 Avg. Net One Way Fare	CY 2011 Ticket Yield	CY 2011 Avg. Ticket Miles
AA	773,752	8.7%	\$164.77	17.79¢	926
CO	453,713	5.1%	\$207.34	19.58¢	1,059
DL	1,608,543	18.0%	\$180.02	17.93¢	1,004
F9	1,197,231	13.4%	\$132.84	13.83¢	960
FL	202,393	2.3%	\$133.92	13.76¢	973
UA	640,199	7.2%	\$199.32	19.19¢	1,038
US	620,507	6.9%	\$199.87	15.87¢	1,259
WN	3,430,438	38.4%	\$156.11	17.57¢	888
<b>Total</b>	<b>8,928,621</b>	<b>100.0%</b>	<b>\$166.60</b>	<b>17.15¢</b>	<b>971</b>

<b>RDU</b>					
Carrier	CY 2011 O&D Pax	CY 2011 Pax Share %	CY 2011 Avg. Net One Way Fare	CY 2011 Ticket Yield	CY 2011 Avg. Ticket Miles
AA	1,151,300	14.4%	\$184.91	17.06¢	1,084
B6	437,876	5.5%	\$115.12	18.82¢	612
CO	499,243	6.3%	\$211.85	17.58¢	1,205
DL	2,073,873	26.0%	\$170.57	17.89¢	953
F9	114,698	1.4%	\$147.19	21.28¢	692
FL	220,497	2.8%	\$127.69	15.07¢	847
UA	366,736	4.6%	\$211.33	17.62¢	1,199
US	1,258,970	15.8%	\$167.03	22.37¢	747
WN	1,844,617	23.14%	\$154.58	16.74¢	923
<b>Total</b>	<b>7,971,385</b>	<b>100.0%</b>	<b>\$168.16</b>	<b>18.05¢</b>	<b>932</b>

<b>PIT</b>					
Carrier	CY 2011 O&D Pax	CY 2011 Pax Share %	CY 2011 Avg. Net One Way Fare	CY 2011 Ticket Yield	CY 2011 Avg. Ticket Miles
AA	525,023	7.0%	\$198.45	15.64¢	1,269
B6	247,083	3.3%	\$98.28	18.74¢	525
CO	548,661	7.4%	\$218.31	16.73¢	1,305
DL	1,212,222	16.3%	\$181.19	18.71¢	968
F9	211,205	2.8%	\$129.13	19.93¢	648
FL	765,237	10.3%	\$128.88	13.94¢	925
UA	688,539	9.2%	\$226.97	15.47¢	1,468
US	1,741,948	23.4%	\$172.49	20.03¢	861
WN	1,504,935	20.18%	\$150.34	14.54¢	1,034
<b>Total</b>	<b>7,456,027</b>	<b>100.0%</b>	<b>\$171.32</b>	<b>16.83¢</b>	<b>1,018</b>

## **MSY City Pair Comparison with Similar Sized Airports**

The following tables indicate the nonstop domestic city pair comparison at MSY with airports of similar size, which for this analysis are MCI, RDU, and PIT. The data that is summarized includes the local passengers, average passenger trip length, average passenger yield, and the city pairs portioned off between markets of 750 miles or less and markets over 750 miles. Furthermore, it is indicated which of these city pairs has a low fare carrier present. For this analysis, low fare carrier has been defined as JetBlue, Frontier, Southwest/AirTran, Spirit, and Allegiant. The following data is based on CY 2013 data.

# MSY

O&D Market Rank	Market	Psgr	Net OW Fare	Ticket Yield	Avg. Passenger Trip Length	Nonstop Service	< 750 Miles	> 750 Miles	Low Fare Carrier Present
1	HOU	380,032	\$153.81	50.82¢	303	Y	X		WN
7	IAH	238,987	\$173.68	56.79¢	306	Y	X		-
59	BHM	29,175	\$135.46	32.79¢	413	Y	X		WN
2	ATL	341,364	\$139.77	32.23¢	434	Y	X		WN
5	DAL	284,734	\$138.76	31.45¢	441	Y	X		WN
66	MEM	19,363	\$284.28	63.74¢	446	Y	X		-
12	DFW	210,156	\$110.06	24.24¢	454	Y	X		NK
21	BNA	148,807	\$138.15	27.78¢	497	Y	X		WN
31	AUS	94,415	\$184.96	37.13¢	498	Y	X		WN
15	TPA	181,137	\$142.18	26.22¢	542	Y	X		WN
8	MCO	237,250	\$157.10	25.76¢	610	Y	X		WN
61	EYW	24,205	\$156.87	22.98¢	683	Y	X		WN
28	CLT	107,355	\$184.78	26.50¢	697	Y	X		-
26	STL	109,711	\$179.55	25.56¢	703	Y	X		WN
23	MIA	126,069	\$178.38	24.85¢	718	Y	X		-
22	FLL	131,711	\$173.60	22.58¢	769	Y	X		WN
29	MCI	101,591	\$145.11	17.75¢	818	Y	X		WN
53	CVG	34,812	\$222.45	26.71¢	833	Y	X		-
20	MDW	151,430	\$190.76	22.27¢	856	Y		X	WN
19	ORD	154,904	\$230.39	24.52¢	939	Y		X	-
24	DTW	120,684	\$194.65	19.63¢	992	Y		X	-
13	DCA	198,993	\$226.96	22.75¢	997	Y		X	-
34	MKE	68,465	\$141.24	14.14¢	999	Y		X	WN
38	IAD	51,313	\$264.98	26.00¢	1,019	Y		X	-
9	BWI	235,675	\$190.88	18.32¢	1,042	Y		X	WN
41	CLE	46,547	\$216.85	20.62¢	1,052	Y		X	-
6	DEN	247,740	\$159.43	14.47¢	1,102	Y		X	F9/WN
80	TTN	14,335	\$91.81	8.17¢	1,123	Y		X	F9
14	PHL	192,994	\$202.26	17.40¢	1,163	Y		X	-
30	MSP	101,395	\$214.95	18.49¢	1,163	Y		X	-
10	JFK	233,321	\$199.70	16.80¢	1,189	Y		X	B6
11	EWR	218,137	\$207.17	17.08¢	1,213	Y		X	WN
4	LGA	293,444	\$189.07	15.36¢	1,231	Y		X	-
16	BOS	179,528	\$199.25	13.68¢	1,456	Y		X	B6
25	PHX	110,975	\$204.33	13.96¢	1,464	Y		X	WN
39	SLC	50,320	\$259.07	16.51¢	1,569	Y		X	-
18	LAS	158,561	\$210.55	13.27¢	1,587	Y		X	WN
3	LAX	320,047	\$258.98	14.95¢	1,732	Y		X	WN
17	SFO	177,310	\$283.11	14.06¢	2,014	Y		X	-



## MCI

O&D Market Rank	Market	Psgs	Net OW Fare	Ticket Yield	Avg. Passenger Trip Length	Nonstop Service	< 750 Miles	> 750 Miles	Low Fare Carrier Present
30	STL	101,490	\$121.57	51.24¢	237	Y	X		WN
9	ORD	232,355	\$158.06	38.67¢	409	Y	X		-
2	MDW	337,962	\$141.65	34.63¢	409	Y	X		WN
13	MSP	170,496	\$184.70	45.13¢	409	Y	X		WN
52	OKC	33,201	\$137.22	33.09¢	415	Y	X		WN
8	DAL	240,242	\$151.95	32.80¢	463	Y	X		WN
12	DFW	182,158	\$148.66	31.81¢	467	Y	X		-
28	MKE	102,328	\$133.77	27.99¢	478	Y	X		WN
84	MEM	14,201	\$270.34	52.92¢	511	Y	X		-
31	IND	100,708	\$131.82	25.79¢	511	Y	X		WN
20	BNA	144,860	\$135.17	25.60¢	528	Y	X		WN
1	DEN	462,776	\$113.69	21.11¢	538	Y	X		F9/WN
47	CVG	42,325	\$215.49	36.00¢	599	Y	X		-
38	IAH	80,719	\$251.59	37.50¢	671	Y	X		-
23	HOU	130,239	\$197.22	28.93¢	682	Y	X		WN
25	DTW	120,360	\$264.55	38.05¢	695	Y	X		-
3	ATL	289,661	\$170.59	23.71¢	719	Y	X		WN
43	CLE	61,678	\$238.34	31.46¢	758	Y	X		-
29	MSY	101,591	\$145.11	17.75¢	818	Y	X		WN
44	ABQ	56,991	\$171.77	20.10¢	855	Y	X		WN
27	CLT	109,135	\$181.75	20.09¢	905	Y		X	-
37	IAD	86,718	\$194.88	20.11¢	969	Y		X	-
10	DCA	202,687	\$163.19	16.51¢	988	Y		X	F9
34	SLC	91,187	\$192.31	19.39¢	992	Y		X	-
17	BWI	160,455	\$189.52	18.69¢	1,014	Y		X	WN
5	PHX	279,098	\$182.71	16.58¢	1,102	Y		X	WN
18	PHL	160,330	\$188.08	16.86¢	1,116	Y		X	-
21	TPA	140,581	\$195.45	17.27¢	1,132	Y		X	WN
24	EWR	125,091	\$281.27	24.83¢	1,133	Y		X	-
6	MCO	271,731	\$177.60	15.66¢	1,134	Y		X	WN
11	LGA	189,049	\$268.87	23.02¢	1,168	Y		X	-
4	LAS	285,298	\$178.68	14.96¢	1,194	Y		X	WN
71	JFK	20,527	\$244.38	20.09¢	1,217	Y		X	-
19	BOS	146,818	\$202.48	15.34¢	1,320	Y		X	WN
14	FLL	166,118	\$163.31	12.23¢	1,335	Y		X	WN
7	LAX	265,393	\$200.37	14.17¢	1,414	Y		X	WN
16	SAN	160,524	\$195.16	13.63¢	1,431	Y		X	WN
32	OAK	100,684	\$193.14	12.45¢	1,552	Y		X	WN
22	SFO	135,528	\$238.28	15.17¢	1,571	Y		X	-
15	SEA	163,235	\$196.22	12.23¢	1,605	Y		X	WN
26	PDX	113,525	\$183.29	11.26¢	1,627	Y		X	WN

## RDU

O&D Market Rank	Market	Psgr	Net OW Fare	Ticket Yield	Avg. Passenger Trip Length	Nonstop Service	< 750 Miles	> 750 Miles	Low Fare Carrier Present
81	CLT	12,694	\$143.21	109.64¢	131	Y	X		-
21	DCA	120,050	\$215.12	93.84¢	229	Y	X		-
51	IAD	33,232	\$266.17	115.21¢	231	Y	X		-
9	BWI	206,336	\$130.32	50.77¢	257	Y	X		WN
8	PHL	236,807	\$175.82	51.47¢	342	Y	X		WN
3	ATL	398,605	\$135.03	37.75¢	358	Y	X		WN
49	TTN	39,117	\$61.75	16.55¢	373	Y	X		F9
29	PIT	75,495	\$116.32	31.06¢	375	Y	X		-
7	JFK	237,007	\$130.81	30.20¢	433	Y	X		B6
1	LGA	479,321	\$143.25	32.29¢	444	Y	X		-
45	CVG	44,690	\$222.97	48.74¢	457	Y	X		-
10	BNA	193,887	\$121.76	26.38¢	462	Y	X		WN
17	EWR	153,589	\$221.35	47.83¢	463	Y	X		-
39	CMH	51,582	\$184.93	37.65¢	491	Y	X		-
36	CLE	63,398	\$197.00	37.85¢	520	Y	X		-
5	MCO	271,373	\$131.21	23.35¢	562	Y	X		WN
23	DTW	118,623	\$210.94	36.60¢	576	Y	X		-
30	IND	74,322	\$193.79	32.56¢	595	Y	X		-
35	BDL	63,592	\$179.18	29.65¢	604	Y	X		-
15	TPA	178,325	\$149.99	24.24¢	619	Y	X		WN
2	BOS	417,898	\$140.00	22.50¢	622	Y	X		B6
16	MDW	166,136	\$147.85	22.31¢	663	Y	X		WN
4	ORD	276,047	\$177.24	26.33¢	673	Y	X		-
43	MEM	47,743	\$204.44	30.24¢	676	Y	X		-
19	MIA	147,707	\$134.89	18.41¢	733	Y	X		-
24	STL	109,654	\$168.82	22.28¢	758	Y	X		WN
13	FLL	184,700	\$127.29	16.56¢	769	Y	X		B6/WN
20	MSP	144,505	\$204.23	19.61¢	1,041	Y		X	-
27	IAH	87,536	\$245.88	23.13¢	1,063	Y		X	-
11	DFW	191,942	\$230.64	21.40¢	1,078	Y		X	-
33	HOU	65,307	\$208.18	19.27¢	1,081	Y		X	WN
14	DEN	183,843	\$200.02	12.92¢	1,548	Y		X	WN
22	PHX	118,815	\$218.04	11.15¢	1,956	Y		X	WN
34	SLC	65,132	\$243.39	12.18¢	1,998	Y		X	-
18	LAS	148,718	\$222.73	10.53¢	2,115	Y		X	WN
6	LAX	239,823	\$221.18	9.76¢	2,266	Y		X	-
12	SFO	188,893	\$286.39	11.60¢	2,470	Y		X	-

# PIT

O&D Market Rank	Market	Psgr	Net OW Fare	Ticket Yield	Avg. Passenger Trip Length	Nonstop Service	< 750 Miles	> 750 Miles	Low Fare Carrier Present
285	CLE	152	\$91.05	75.84¢	120	Y	X		F9
67	IAD	15,887	\$287.82	157.67¢	183	Y	X		
51	DTW	26,061	\$319.96	156.90¢	204	Y	X		
38	DCA	50,245	\$161.62	78.04¢	207	Y	X		
27	BWI	68,608	\$125.30	57.46¢	218	Y	X		WN
68	CVG	15,743	\$284.94	107.31¢	266	Y	X		
16	PHL	163,593	\$242.62	87.74¢	277	Y	X		
19	EWR	112,464	\$260.04	79.11¢	329	Y	X		
4	LGA	281,173	\$211.04	62.80¢	336	Y	X		
30	JFK	63,191	\$170.32	48.39¢	352	Y	X		B6
25	RDU	75,495	\$116.32	31.06¢	375	Y	X		
10	MDW	187,476	\$132.72	32.92¢	403	Y	X		WN
7	ORD	228,174	\$161.41	37.87¢	426	Y	X		
26	BDL	72,640	\$140.65	32.22¢	437	Y	X		
18	CLT	120,849	\$199.64	45.45¢	439	Y	X		
2	BOS	332,086	\$125.43	24.84¢	505	Y	X		B6
3	ATL	292,677	\$160.89	29.81¢	540	Y	X		WN
21	STL	85,290	\$157.42	24.02¢	655	Y	X		
32	BNA	60,474	\$160.60	23.46¢	685	Y	X		WN
41	MEM	38,975	\$202.65	26.15¢	775	Y	X		
20	MSP	107,990	\$233.25	28.25¢	826	Y	X		
1	MCO	419,985	\$140.95	16.45¢	857	Y		X	WN
5	TPA	269,540	\$142.07	15.72¢	904	Y		X	WN
12	RSW	169,434	\$150.35	15.12¢	994	Y		X	WN
28	PBI	65,612	\$157.99	15.43¢	1,024	Y		X	WN
9	FLL	192,090	\$153.86	14.80¢	1,039	Y		X	WN
23	MIA	77,704	\$162.52	15.10¢	1,076	Y		X	
8	DFW	194,427	\$232.96	20.61¢	1,131	Y		X	
11	IAH	178,849	\$291.08	25.03¢	1,163	Y		X	
34	HOU	56,584	\$201.72	16.66¢	1,211	Y		X	WN
15	DEN	163,900	\$235.05	17.16¢	1,370	Y		X	WN
14	PHX	163,936	\$223.12	11.85¢	1,882	Y		X	WN
6	LAS	255,797	\$189.09	9.43¢	2,004	Y		X	WN
13	LAX	165,449	\$270.79	12.08¢	2,241	Y		X	
17	SFO	147,095	\$287.25	12.02¢	2,391	Y		X	

## **SUMMARY**

MSY is committed to encouraging and facilitating airline competition. MSY staff strategically identifies markets that currently or potentially support nonstop service. Once those markets are identified, MSY begins negotiations with carriers who might have an interest in entering one of the individual markets with competitive service and fares.

Similarly, MSY identifies markets with potentially higher average fares and brings it to a low-cost carrier's attention, such as Dallas/Fort Worth and Newark which were added in 2013 by Spirit Airlines and Southwest Airlines respectively. Chicago, Detroit and Ft. Lauderdale were also added by Spirit Airlines in 2014 to compete with legacy carriers and another low-cost carrier, Southwest Airlines. Allegiant Air, also known for their ultra-low cost model will begin nonstop service to Orlando-Sanford, Columbus-Rickenbacker, Indianapolis and Cincinnati in the first quarter of 2015.

As opportunities unfold and opportunities to increase service and improve competition further arise, MSY is dedicated to maximizing the use of its facilities for existing and potential new entrant carriers. At this time, MSY ticket and gate areas are not at maximum capacity, and able to accommodate expanded or new service as needed.