



## **Louis Armstrong New Orleans International Airport (MSY) Airline Competition Plan**

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Federal Aviation Administration

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## OVERVIEW

Louis Armstrong New Orleans International Airport (“MSY”) is owned by the City of New Orleans and operated by the New Orleans Aviation Board (“NOAB”). MSY is physically located in the City of Kenner and in the Parishes of Jefferson and St. Charles. It is located approximately 10 miles west of the City of New Orleans central business district. MSY is the primary commercial airport for the New Orleans metropolitan area and southeast Louisiana.

After Hurricane Katrina in 2005, annual enplanements dropped 36% from 2004 to 2006. Today, both the region and MSY continue a robust recovery. Calendar year 2012 enplanements at MSY have returned to approximately 90% of pre-Katrina levels. The annual enplanements for the past four (4) calendar years are as follows:

- 2009 – 3,905,572
- 2010 – 4,102,138
- 2011 – 4,280,188
- 2012 – 4,306,707

MSY is identified by the Federal Aviation Administration (“FAA”) as a medium hub airport. MSY hosts ten (10) air carriers and two (2) all-cargo carriers (January 2013). There are currently 38 non-stop destinations served from MSY, not including Key West, FL starting on March 9, 2013. 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 account for 50.5% in 2011. In the past three years, MSY has seen five (5) new carriers start 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
	US Airways	jetBlue	Air Canada
		Spirit	

MSY has two (2) runways:

- Runway 10/28 (10,104’ length by 150’ wide) concrete pavement surface; and
- Runway 1/19 (7,001’ length by 150’ wide) concrete pavement surface.

The average number of daily departures (1H2013) is approximately 135. 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:

- Twenty-two ticketing counters and multiple options for offices;
- Eleven Jet bridge and hold rooms are vacant, available for lease by airlines

C. Significant level of existing competition

- Approximately 44% (Year Ending January, 2013) of capacity operated by low-cost carriers, projected to increase to 47.2% by September 2013.
- Consistently lower fares than the national average (Compared to top 100 passenger markets, BTS.gov).

D. No complaints received from incumbent or new entrant carriers regarding denial of space prior to filing this plan. In July 2012, Spirit Airlines was given the option of several gates, hold rooms with access to Federal Inspection Services (FIS), ticket counters, and office space.

MSY has prepared this Competition Plan in accordance with the Wendell H. Ford Aviation Investment and Reform Act for the 21<sup>st</sup> Century (“AR-21”), Section 155, and applicable FAA Program Guidance. MSY is listed as one of the medium hub airports that the combined totals of two airlines have 50.5% of all passenger boardings. Accordingly, Section 155 requires submission of a competition plan in order for a new Passenger Facility Charge to be approved or a grant to be issued under AIP beginning Fiscal Year 2013. This competition Plan provides the 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.

## **AVAILABILITY OF GATES AND RELATED FACILITIES**

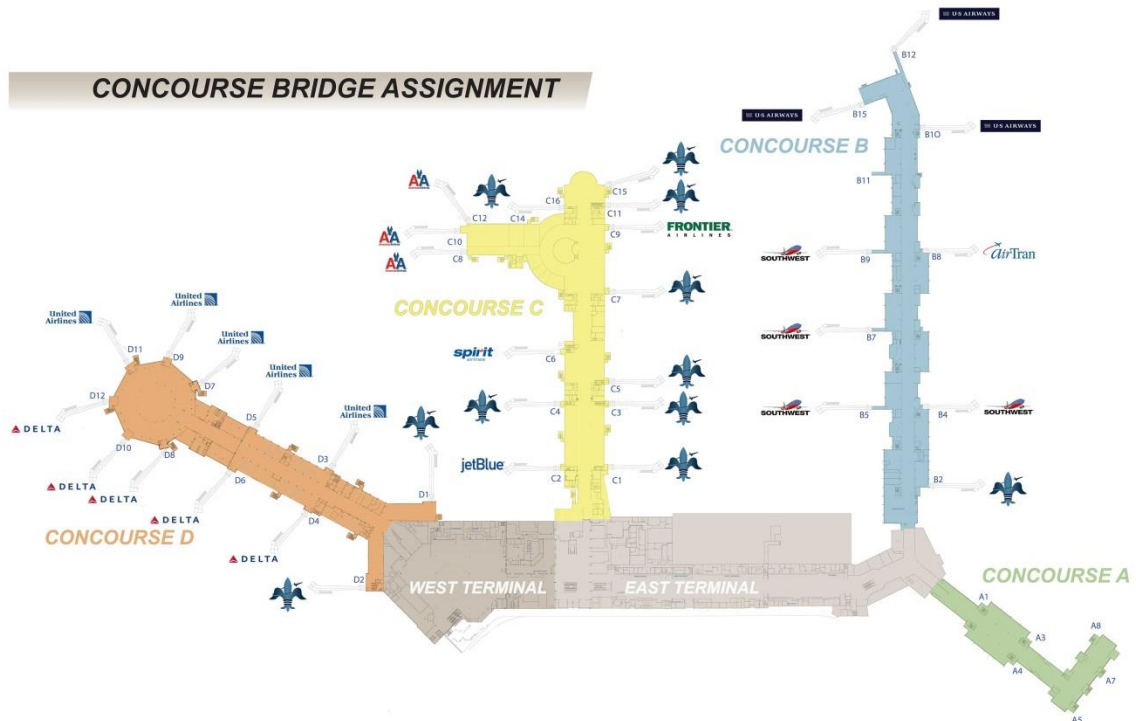
### **A. Number of gates available at MSY by lease arrangement**

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 six gates, they would only be leased on a preferential use or common use basis.

As of January 2013, the allocation of the gates is as follows:

1. Sixteen (16) gates with MSY-owned jet bridges are under preferential leases to signatory airlines.
2. Eight (8) gates are under preferential leases to signatory airlines that also own the associated jet bridge on the particular leased gate(s).
3. Two (2) gates with a MSY-owned jet bridges are under a common use (non-signatory) lease with airlines.
  - 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 a common use gate since October 2010, averaging one daily flight. The common use gate has not created an impediment to the Air Canada schedule.
4. Eleven (11) gates with Airport-owned jet bridges are available for use or lease by 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. 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 11 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 Competition Plan, 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.

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

MSY makes no difference in its gate monitoring.

**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.

**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?**

MSY has not been required to invoke PFC competitive assurance #7 to convert previously exclusive-use gates to preferential-use gates. All gates are leased as preferential or common use gates. MSY does not have exclusive use gates.

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

In January 2013, approximately 869 flights per week were scheduled to depart from MSY. With 26 of the available 42 gates being used on a daily scheduled basis, airport-wide utilization per gate in January 2013 was 33 flights per week and 132 per month. The following table below shows the full year average for gate utilization by operating carrier in 2012.

## Full Year Ending December 2012 Gate Utilization

Airline	Number of Departures	Number of Gates <sup>1</sup>	Daily Turns per Gate
American Airlines	3,251		
American Eagle	1,004		
<b>Combined Operations</b>	<b>4,255</b>	<b>3</b>	<b>3.89</b>
Continental Airlines	507		
Colgan Air	101		
Chautauqua Airlines	37		
Expressjet Airlines	105		
<b>Combined Operations</b>	<b>750</b>	<b>4</b>	<b>0.51</b>
United Airlines	4,743		
Colgan Air	177		
Chautauqua Airlines	178		
ExpressJet Airlines	850		
Shuttle America	658		
Skywest	19		
GoJet Airlines	819		
Air Canada	365		
<b>Combined Operations</b>	<b>7,809</b>	<b>3</b>	<b>7.13</b>
Delta Air Lines	6,393		
Pinnacle Airlines	815		
Compass Airlines	408		
ExpressJet Airlines	430		
Comair	362		
SkyWest Airlines	247		
Chautauqua Airlines Inc.	32		
Shuttle America	17		
Mesaba Aviation	4		
<b>Combined Operations</b>	<b>8,708</b>	<b>5</b>	<b>4.77</b>
US Airways	2,197		
PSA	2		
Mesa Airlines	256		
Midwest Airlines	2,012		
<b>Combined Operations</b>	<b>4,467</b>	<b>3</b>	<b>4.08</b>
Frontier Airlines	253		
Midwest Airlines	214		
<b>Combined Operations</b>	<b>467</b>	<b>1</b>	<b>1.28</b>
<b>JetBlue Airways</b>	<b>1,358</b>	<b>1</b>	<b>3.72</b>
<b>Southwest Airlines</b>	<b>14,689</b>	<b>5</b>	<b>8.05</b>
<b>AirTran Airways</b>	<b>1,726</b>	<b>1</b>	<b>4.73</b>
<b>TOTAL MSY</b>	<b>44,229</b>	<b>26</b>	<b>4.66</b>

<sup>1</sup> Includes terminal gates with jet bridges

\* Southwest leases 4 gates and one on a per turn basis

Sources: Departures-- Diio Mi; Gates-- 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**

In the past calendar year, Spirit Airlines has announced intentions to serve MSY. In July, 2012 the announcement was made and negotiations for terminal and gate space for gate areas began immediately. The NOAB accommodated this new entrant quickly. Spirit Airlines occupied their leased space in January 2013 well in advance of its service commencement on January 24, 2013. In August 2012, Southwest Airlines announced an expansion of their daily flight schedule from 84 to 114 flights (including their AirTran subsidiary) by March of 2013. No additional operations space was required by Southwest to accommodate this increased service. However, there is currently a vacant and adjacent gate (B2) available on Concourse B should Southwest elect to lease it on a preferential basis to accommodate any additional flights.

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

The objective of the NOAB is to offer to all Air Transportation Companies desiring to serve MSY access to MSY and provide adequate gate positions and space in the terminal building. With vacant gate areas and terminal space available, no incumbent or new entrant carrier has been denied space. However, if space were to become limited, the NOAB will pursue the objective of achieving an optimum balance in the overall utilization of the terminal building and apron areas, if necessary, through sharing, from time to time, of gate positions and other passenger handling facilities.

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

MSY does not have a “use it or lose it” provision in any of its leases for preferential-use or common-use terminal space.

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

According to the preferential-use requirements in the Airline-Airport Use and Lease Agreement, for any carrier requesting use of a gate, where there were no gates available for lease, and they cannot sublease gates from another carrier, and there are underutilized gates, MSY would require the shared use of preferential gates and related facilities to accommodate new entrants and/or expanded service from existing air carriers.

**K. Plans to make gates and related facilities available to new entrants 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 July 2012, Spirit Airlines made an announcement to serve New Orleans from Dallas/Fort Worth. Spirit was given an option to choose their gate(s) from the then available twelve gates with vacant jet bridges, six of which had FIS access. Spirit Airlines was also able to select ticket counter space from among the then twenty-two vacant counters. Additionally, in August 2012 Southwest Airlines announced an expansion of their daily flight schedule from 84 to 114 flights (including their AirTran subsidiary) by March of 2013. Southwest was offered additional gates and ticket counter locations, but has not made a determination if it will elect to lease additional space, as of the submission of the competition plan.

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

The airport 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 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.**

There are currently 44 RON apron positions at MSY, all of which are unassigned and allocated on a first come first-served basis. Additionally, leased preferential-use gates are utilized for RON, firstly by the signatory and secondly by another incumbent airline or a guest airline. Unassigned gates may also be used as RON parking. Overflow areas utilized for temporary RON are located at the West Air Cargo Ramp.

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

Assignment of designated RON spaces and overflow RON parking is handled by the Airport's Airport Operations Department. Requests are normally received by phone.

## **2.) Monitoring Procedures**

Airport Operations patrol aircraft gate and RON apron areas several times per day. Airport Operations staff remain on-site and continually in contact by phone and radio to assist carriers with RON parking.

## **LEASING AND SUBLEASING ARRANGEMENTS**

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

No. The NOAB does not require new entrant carriers to reach a subtenant arrangement with an incumbent carrier to begin service.

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

At the request of a new entrant airline's request, the NOAB provides a comprehensive contact list of on-airport ground handlers, air carriers, and catering providers. If requested, the NOAB introduces the airline to station managers of incumbent carriers that may be interested in providing services, thereby initiating the evaluation and negotiation process for ground handling.

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

The Airline cannot directly or indirectly, assign, sell, hypothecate, or otherwise transfer the Airline-Airport Use Agreement, or any portion of the premises, without prior written consent of the NOAB.

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

Under the Airline-Airport Use and Lease Agreement, Airline's 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 the NOAB.

### **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, NOAB sponsors an Airport-Airline Affairs Committee ("AAAC") as a primary vehicle for airlines to resolve any disputes in regard to airport facilities. NOAB also hosts a monthly airline station

managers meeting as an additional means to identify any issues or concerns in regard to use of MSY facilities.

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

To date, no subtenants have complained about excessive sublease fees or unneeded bundling of services.

**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 six independent and contractible companies on-site to provide on-call ground handling.

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

A sample lease and use agreement is attached.

**PATTERNS OF AIR SERVICE**

**A. Number of Markets Served**

As of January 2013, MSY has non-stop service to 36 domestic and 1 international destination. In February 2013, Frontier Airlines will begin non-stop service to Trenton, New Jersey. In March 2013, Southwest Airlines will begin non-stop service to Key West, Florida.

**B. Non-Stop Markets and Flight frequency**

Louis Armstrong New Orleans International Airport – CY 2012

	Domestic	International
Number of markets served non-stop	36	1
Average number of flights per day	121	1
Number of markets served by low-cost carriers	19	NA
Number of markets served by one carrier	28	1
Number of new markets added in the past year	2	NA
Number of previously served markets dropped in the past year	NA	NA

Source: Diio Mi

## **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, but with eleven 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.**

Tenant carriers are made aware at monthly staff meetings with MSY staff.

- 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?**

If an airline requests additional gate(s), the NOAB maintains a list of vacant and leased areas that will be shared with the requesting airline.

- 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 eleven available common-use gates with jet bridges available for new entrant carriers. There are nine available gates with no jet bridges that become options if additional space is needed by any carrier, new or existing.

## **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**

Airport Operations staff monitor NOAB gates on a daily basis. 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**

Current Signatory carriers: AirTran Airways, American Airlines, JetBlue Airways, Delta Air Lines, Southwest Airlines, United Airlines, and US Airways

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

An Air Transportation Company that provides passenger service and leases at least 2,500 square feet of terminal space, schedules at least two daily departures and has executed an agreement with the NOAB.

**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**

There is no shortage of vacant gates to force shared use or sub-leasing arrangements.

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

Not applicable.

**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**

Common-use gates are assigned on a first come, first serve basis. MSY has eleven common-use gates available for leasing. An interested carrier is given a list of available options from which to choose.

**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.**

A target budget is created based upon enplanements and non-aviation revenues.

## **FINANCIAL CONSTRAINTS**

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

Local airport revenues and PFC funds.

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

MSY employs a residual methodology for the calculation of airline rates and charges in accordance with the existing Airport-Airline Use and Lease Agreement.

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

In the past, MSY has used PFC's for the procurement of aircraft loading bridges, and various terminal improvement projects, such as interior public space renovations, restroom renovations, exterior terminal renovation, and improved signage.

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

MSY uses discretionary unrestricted funds for airport capital improvements in accordance with the current Airport-Airline Use and Lease Agreement.

## **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**

None, as the existing agreements are in place until expiration on December 31, 2013.

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

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

Eleven gates are available for preferential or common use.

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

A new terminal feasibility study is currently underway. The results of the study will guide MSY on the capacity and need for gates (common use and preferential). Leasing methodology and project financing are to be determined as part of the terminal feasibility study. Depending on the results of the study, it is anticipated that completion of a new facility would occur in 2018.

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

No air carrier that has been serving MSY for the past three consecutive years is relying exclusively on common-use gates.

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

Refer to B.

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

There are six gates with access to the Federal Inspection Service (FIS) area and can also be used in conjunction with domestic service.

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

JetBlue Airways and Spirit Airlines utilize an international gate for providing domestic service only. There is no difference in rental rates for domestic operations on an international capable gate.

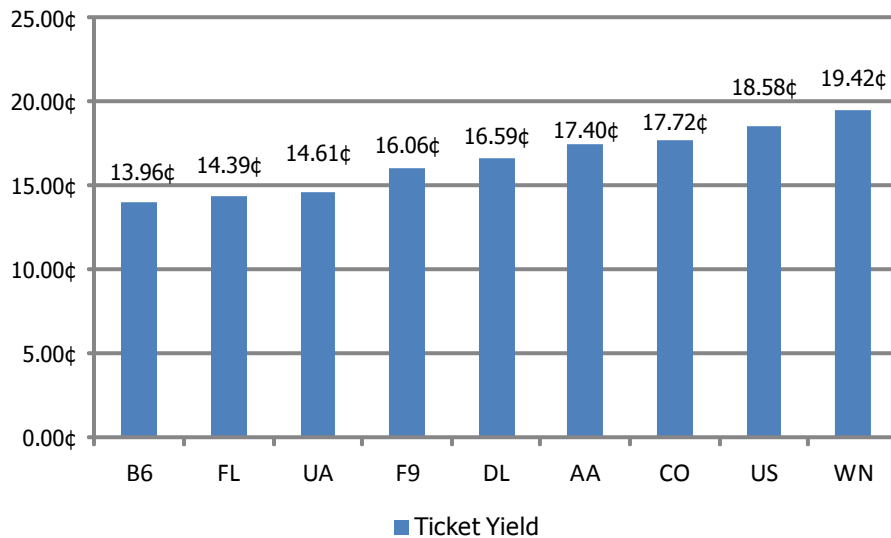


## AIRFARE COMPARISON

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 Louis Armstrong New Orleans International Airport among the incumbent air carriers. The range, between 13.96 – 19.42 cents for CY 2011, is an acceptable range which encourages healthy competition among the carriers. For example, Delta Air Lines captured approximately 21% of the passenger share at MSY in CY 2011, but its average ticket yield is in the middle of the range at 16.59 cents. Southwest Airlines, whose average fare is among the lowest of the incumbent carriers at MSY at \$161.93, has the highest ticket yield of 19.42 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 834 miles. Therefore, when the fare is adjusted on a per mile basis the result is the highest ticket yield, but still quite competitive.

**MSY Ticket Yield by Carrier Comparison CY 2011**



Source: US DOT data sourced via AviationDataminer™

## MSY Airfares vs. Comparison Airports

Louis Armstrong New Orleans International Airport (MSY) ranked #42 in overall enplanements in CY 2011, a 4.1% increase over CY 2010. Based on the current ranking of MSY, airports that generated similar levels of enplanements for CY 2011 have been compared to MSY for the purposes of the airfare comparison. The airports chosen for this comparison are as follows:

- Raleigh-Durham International Airport (RDU)
- Austin-Bergstrom International Airport (AUS)
- Pittsburgh International Airport (PIT)

Rank	FAA Region	State	Locid	City	Airport Name	Arpt Category	Hub	CY 11 Enplanements	CY 10 Enplanements	% Change
37	SO	NC	RDU	Raleigh	Raleigh-Durham International	P	M	4,462,508	4,465,736	-0.1%
38	SW	TX	AUS	Austin	Austin-Bergstrom International	P	M	4,436,661	4,201,136	5.6%
42	SW	LA	MSY	Metairie	Louis Armstrong New Orleans International	P	M	4,255,411	4,088,889	4.1%
45	EA	PA	PIT	Pittsburgh	Pittsburgh International	P	M	4,070,614	3,996,656	1.9%

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 Louis Armstrong New Orleans International Airport to its 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 (RDU, AUS, and PIT), MSY had the lowest percentage increase in year-over-year yield increase between 2011 and 2010. Furthermore, the average yield of 17.29 cents in CY 2011 is very competitive with the peer airports.

### MSY vs. Similar Sized Airports Ticket Yield Trend Three Year Trend: 2009 – 2011

Airport	CY 2009	CY 2010	CY 2011	10 vs '09 YOY % Increase	11 vs '10 YOY % Increase
<b>MSY</b>	14.65¢	16.10¢	17.29¢	9.9%	7.4%
<b>RDU</b>	14.17¢	15.98¢	18.05¢	12.8%	13.0%
<b>AUS</b>	13.85¢	15.16¢	16.47¢	9.5%	8.6%
<b>PIT</b>	13.76¢	15.54¢	16.85¢	12.9%	8.5%

Source: US DOT data sourced via AviationDataminer™

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

In addition to analyzing the overall yields at MSY vs. the similar sized airports, it is instructive to examine the yields in the MSY Top 25 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 RDU, AUS, and PIT.

MSY Top 25 O&D Market Yields  
vs. Comparison Airports  
CY 2011

MSY					RDU					AUS					PIT				
Rank	Market	Psg	Net OW Fare	Ticket Yield	Market	Psg	Net OW Fare	Ticket Yield	Market	Psg	Net OW Fare	Ticket Yield	Market	Psg	Net OW Fare	Ticket Yield			
1	HOU	372,020	\$133.34	43.98¢	HOU	44,012	\$180.75	15.37¢	HOU	80,400	\$125.35	84.68¢	HOU	33,516	\$199.66	14.94¢			
2	ATL	295,812	\$130.99	30.10¢	ATL	365,259	\$126.82	35.45¢	ATL	162,814	\$232.65	27.51¢	ATL	286,701	\$148.55	27.45¢			
3	LAX	292,226	\$217.47	12.60¢	LAX	185,163	\$216.60	9.18¢	LAX	325,198	\$201.14	15.72¢	LAX	149,316	\$268.48	11.90¢			
4	LGA	272,877	\$169.89	13.74¢	LGA	493,416	\$116.00	26.65¢	LGA	105,886	\$206.66	12.90¢	LGA	257,297	\$146.88	42.67¢			
5	DAL	261,726	\$145.63	32.67¢	DAL	17,952	\$175.63	14.81¢	DAL	297,726	\$133.75	70.36¢	DAL	12,319	\$233.83	19.03¢			
6	BWI	260,055	\$148.20	14.28¢	BWI	196,975	\$123.16	46.42¢	BWI	190,094	\$210.78	15.30¢	BWI	78,517	\$115.76	50.39¢			
7	IAH	243,361	\$151.47	49.55¢	IAH	106,012	\$240.74	22.67¢	IAH	52,115	\$139.64	99.64¢	IAH	173,135	\$287.34	24.74¢			
8	DEN	235,212	\$142.31	12.96¢	DEN	189,784	\$167.79	10.78¢	DEN	395,343	\$121.37	15.37¢	DEN	160,676	\$220.68	15.92¢			
9	MCO	214,812	\$150.62	24.32¢	MCO	247,438	\$133.59	23.91¢	MCO	193,387	\$152.23	14.61¢	MCO	476,759	\$128.37	14.89¢			
10	DCA	212,089	\$199.78	19.86¢	DCA	138,498	\$197.06	86.19¢	DCA	91,851	\$255.55	17.81¢	DCA	48,186	\$140.56	67.50¢			
11	ORD	207,937	\$180.70	20.69¢	ORD	263,026	\$173.29	25.80¢	ORD	249,152	\$202.85	20.32¢	ORD	224,867	\$159.08	37.60¢			
12	JFK	205,034	\$167.70	14.03¢	JFK	231,372	\$109.23	25.44¢	JFK	209,666	\$210.02	13.68¢	JFK	197,397	\$112.49	32.92¢			
13	LAS	173,000	\$183.97	11.57¢	LAS	176,000	\$205.15	9.74¢	LAS	284,339	\$169.97	14.69¢	LAS	284,498	\$175.50	8.61¢			
14	PHL	170,453	\$185.64	15.94¢	PHL	355,884	\$120.12	35.35¢	PHL	106,094	\$202.03	13.30¢	PHL	337,548	\$108.69	40.36¢			
15	EWB	166,495	\$205.84	16.88¢	EWB	178,071	\$191.50	42.47¢	EWB	178,182	\$257.58	16.78¢	EWB	108,701	\$232.31	71.55¢			
16	BOS	159,332	\$170.54	11.64¢	BOS	412,062	\$117.45	18.90¢	BOS	187,265	\$202.16	11.58¢	BOS	364,023	\$100.76	20.05¢			
17	DFW	159,303	\$142.62	31.15¢	DFW	192,267	\$224.42	20.67¢	DFW	128,731	\$130.76	68.37¢	DFW	202,755	\$231.25	20.32¢			
18	TPA	158,177	\$144.07	26.16¢	TPA	183,488	\$141.55	23.11¢	TPA	81,752	\$184.63	18.36¢	TPA	264,464	\$131.91	14.54¢			
19	SFO	149,955	\$232.67	11.46¢	SFO	153,296	\$258.82	10.10¢	SFO	246,116	\$207.36	13.33¢	SFO	141,841	\$260.84	10.92¢			
20	BNA	124,763	\$142.75	28.53¢	BNA	157,392	\$137.31	28.97¢	BNA	110,655	\$164.26	20.60¢	BNA	53,515	\$159.22	21.80¢			
21	FLL	122,804	\$161.76	20.71¢	FLL	172,267	\$122.03	16.56¢	FLL	135,595	\$153.05	13.33¢	FLL	237,068	\$127.34	12.21¢			
22	MIA	112,674	\$165.51	22.67¢	MIA	134,758	\$128.83	17.60¢	MIA	32,045	\$204.82	15.69¢	MIA	68,753	\$156.79	14.43¢			
23	MDW	107,050	\$171.37	19.79¢	MDW	135,060	\$156.53	23.61¢	MDW	102,887	\$176.51	17.47¢	MDW	179,337	\$131.05	32.40¢			
24	MCI	103,334	\$136.10	16.60¢	MCI	80,897	\$161.71	15.42¢	MCI	101,861	\$141.31	20.84¢	MCI	61,018	\$146.12	15.53¢			
25	DTW	102,616	\$190.59	18.83¢	DTW	126,337	\$190.64	32.19¢	DTW	99,519	\$214.71	17.61¢	DTW	29,319	\$301.35	148.51¢			

## CY 2011 Comparison

<b>MSY</b>					
Airline	CY 2011 O&D Pax	CY 2011 Passenger Share %	CY 2011 Avg Net One Way Fare	CY 2011 Avg Ticket Miles	CY 2011 Ticket Yield
AA	752,659	9.7%	\$180.13	1,035	17.40¢
B6	254,493	3.3%	\$173.16	1,240	13.96¢
CO	857,666	11.0%	\$192.03	1,084	17.72¢
DL	1,627,811	20.9%	\$180.57	1,088	16.59¢
F9	278,275	3.6%	\$176.80	1,101	16.06¢
FL	356,242	4.6%	\$128.74	895	14.39¢
UA	542,301	7.0%	\$214.50	1,468	14.61¢
US	515,526	6.6%	\$197.31	1,062	18.58¢
WN	2,604,844	33.4%	\$161.93	834	19.42¢
<b>Total</b>	<b>7,789,817</b>	<b>100.0%</b>	<b>\$176.26</b>	<b>1,019</b>	<b>17.29¢</b>

<b>RDU</b>					
Airline	CY 2011 O&D Passenger	CY 2011 Passenger Share %	CY 2011 Avg Net One Way Fare	CY 2011 Avg Ticket Miles	CY 2011 Ticket Yield
AA	1,151,357	14.4%	\$184.96	1,084	17.07¢
B6	437,876	5.5%	\$115.12	612	18.82¢
CO	499,402	6.3%	\$211.86	1,205	17.58¢
DL	2,077,460	26.1%	\$170.50	952	17.90¢
F9	114,668	1.4%	\$147.19	692	21.28¢
FL	220,497	2.8%	\$127.69	847	15.07¢
UA	366,656	4.6%	\$211.30	1,199	17.63¢
US	1,255,622	15.8%	\$167.18	748	22.36¢
WN	1,844,617	23.1%	\$154.58	923	16.74¢
<b>Total</b>	<b>7,968,155</b>	<b>100.0%</b>	<b>\$168.18</b>	<b>932</b>	<b>18.05¢</b>

<b>AUS</b>					
Airline	CY 2011 O&D Passenger	CY 2011 Passenger Share %	CY 2011 Avg Net One Way Fare	CY 2011 Avg Ticket Miles	CY 2011 Ticket Yield
AA	1,590,681	19.6%	\$193.02	1,159	16.66¢
AS	152,134	1.9%	\$186.17	1,836	10.14¢
B6	525,707	6.5%	\$172.11	1,417	12.14¢
CO	717,468	8.8%	\$213.27	1,222	17.46¢
DL	951,891	11.7%	\$213.25	1,236	17.25¢
F9	263,664	3.2%	\$123.88	1,058	11.71¢
UA	538,747	6.6%	\$246.38	1,371	17.98¢
US	355,566	4.4%	\$213.26	1,358	15.71¢
WN	3,029,649	37.3%	\$164.33	921	17.84¢
<b>Total</b>	<b>8,125,506</b>	<b>100.0%</b>	<b>\$187.32</b>	<b>1,137</b>	<b>16.47¢</b>

<b>PIT</b>					
Airline	CY 2011 O&D Passenger	CY 2011 Pax Share %	CY 2011 Avg Net One Way Fare	CY 2011 Avg Ticket Miles	CY 2011 Ticket Yield
AA	525,208	7.0%	\$198.71	1,272	15.62¢
B6	247,083	3.3%	\$98.28	525	18.74¢
CO	548,594	7.4%	\$218.29	1,305	16.73¢
DL	1,212,226	16.3%	\$181.19	968	18.71¢
F9	211,242	2.8%	\$129.18	648	19.94¢
FL	765,237	10.3%	\$128.88	925	13.94¢
UA	688,605	9.2%	\$226.98	1,467	15.47¢
US	1,742,447	23.4%	\$172.56	861	20.03¢
WN	1,504,935	20.2%	\$150.34	1,034	14.54¢
<b>Total</b>	<b>7,445,577</b>	<b>100.0%</b>	<b>\$171.62</b>	<b>1,018</b>	<b>16.85¢</b>

## CY 2010 Comparison

<b>MSY</b>					
<b>Airline</b>	<b>CY 2010 O&amp;D Pax</b>	<b>CY 2010 Passenger Share %</b>	<b>CY 2010 Avg Net One Way Fare</b>	<b>CY 2010 Avg Ticket Miles</b>	<b>CY 2010 Ticket Yield</b>
AA	790,360	10.5%	\$169.61	1,066	15.92¢
B6	280,156	3.7%	\$155.41	1,237	12.56¢
CO	903,153	12.0%	\$171.06	1,097	15.60¢
DL	1,413,224	18.7%	\$167.63	1,067	15.72¢
F9	70,128	0.9%	\$124.78	1,165	10.71¢
FL	349,183	4.6%	\$110.59	886	12.48¢
UA	575,662	7.6%	\$201.21	1,433	14.04¢
US	717,422	9.5%	\$189.39	1,049	18.05¢
WN	2,443,039	32.4%	\$144.08	785	18.36¢
<b>Total</b>	<b>7,542,325</b>	<b>100.0%</b>	<b>\$161.63</b>	<b>1,004</b>	<b>16.10¢</b>

<b>RDU</b>					
<b>Airline</b>	<b>CY 2010 O&amp;D Pax</b>	<b>CY 2010 Passenger Share %</b>	<b>CY 2010 Avg Net One Way Fare</b>	<b>CY 2010 Avg Ticket Miles</b>	<b>CY 2010 Ticket Yield</b>
AA	1,335,491	16.5%	\$163.79	1,030	15.90¢
B6	366,124	4.5%	\$103.65	610	16.98¢
CO	545,933	6.7%	\$175.27	1,119	15.67¢
DL	1,806,803	22.3%	\$157.07	1,010	15.56¢
F9	78,776	1.0%	\$109.61	626	17.50¢
FL	236,358	2.9%	\$106.21	868	12.23¢
UA	399,676	4.9%	\$174.54	1,241	14.06¢
US	1,309,085	16.2%	\$144.90	759	19.08¢
WN	1,967,685	24.3%	\$136.21	876	15.54¢
YX	50,148	0.6%	\$118.90	711	16.73¢
<b>Total</b>	<b>8,096,079</b>	<b>100.0%</b>	<b>\$148.53</b>	<b>930</b>	<b>15.98¢</b>

<b>AUS</b>					
<b>Airline</b>	<b>CY 2010 O&amp;D Pax</b>	<b>CY 2010 Passenger Share %</b>	<b>CY 2010 Avg Net One Way Fare</b>	<b>CY 2010 Avg Ticket Miles</b>	<b>CY 2010 Ticket Yield</b>
AA	1,553,796	20.1%	\$181.12	1,160	15.61¢
AS	231,633	3.0%	\$168.07	1,720	9.77¢
B6	503,688	6.5%	\$159.85	1,422	11.24¢
CO	671,052	8.7%	\$197.34	1,219	16.18¢
DL	879,742	11.4%	\$191.92	1,239	15.49¢
F9	219,639	2.8%	\$120.03	1,053	11.40¢
UA	436,512	5.6%	\$204.33	1,334	15.32¢
US	353,793	4.6%	\$188.67	1,320	14.29¢
WN	2,879,446	37.2%	\$148.02	876	16.90¢
<b>Total</b>	<b>7,729,301</b>	<b>100.0%</b>	<b>\$169.70</b>	<b>1,119</b>	<b>15.16¢</b>

<b>PIT</b>					
<b>Airline</b>	<b>CY 2010 O&amp;D Pax</b>	<b>CY 2010 Passenger Share %</b>	<b>CY 2010 Avg Net One Way Fare</b>	<b>CY 2010 Avg Ticket Miles</b>	<b>CY 2010 Ticket Yield</b>
AA	433,120	5.9%	\$184.61	1,260	14.65¢
B6	241,736	3.3%	\$91.51	496	18.45¢
CO	446,448	6.1%	\$203.81	1,201	16.96¢
DL	1,157,052	15.8%	\$164.67	992	16.60¢
F9	166,426	2.3%	\$112.07	523	21.42¢
FL	800,005	10.9%	\$109.64	944	11.62¢
UA	743,388	10.1%	\$200.98	1,400	14.36¢
US	1,803,468	24.6%	\$160.32	883	18.16¢
WN	1,425,666	19.4%	\$131.07	967	13.55¢
YX	120,467	1.6%	\$133.38	612	21.78¢
<b>Total</b>	<b>7,337,777</b>	<b>100.0%</b>	<b>\$153.87</b>	<b>990</b>	<b>15.54¢</b>

## CY 2009 Comparison

MSY					
Airline	CY 2009 O&D Pax	CY 2009 Passenger Share %	CY 2009 Avg Net One Way Fare	CY 2009 Avg Ticket Miles	CY 2009 Ticket Yield
AA	875,496	12.0%	\$150.24	1,069	14.06¢
B6	269,401	3.7%	\$150.46	1,239	12.14¢
CO	934,612	12.8%	\$148.67	1,077	13.80¢
DL	1,310,199	17.9%	\$152.43	1,034	14.74¢
FL	296,593	4.1%	\$104.91	871	12.05¢
UA	581,175	8.0%	\$188.78	1,452	13.01¢
US	686,653	9.4%	\$174.10	1,052	16.55¢
WN	2,352,148	32.2%	\$123.97	762	16.27¢
<b>Total</b>	<b>7,306,277</b>	<b>100.0%</b>	<b>\$145.47</b>	<b>993</b>	<b>14.65¢</b>

RDU					
Airline	CY 2009 O&D Pax	CY 2009 Passenger Share %	CY 2009 Avg Net One Way Fare	CY 2009 Avg Ticket Miles	CY 2009 Ticket Yield
AA	1,555,993	19.4%	\$142.78	979	14.58¢
B6	278,263	3.5%	\$96.71	599	16.16¢
CO	510,576	6.4%	\$152.17	1,172	12.99¢
DL	1,799,459	22.4%	\$140.92	982	14.36¢
FL	261,036	3.3%	\$97.98	919	10.66¢
UA	374,002	4.7%	\$157.24	1,241	12.67¢
US	1,284,529	16.0%	\$132.28	822	16.08¢
WN	1,950,997	24.3%	\$118.38	877	13.50¢
<b>Total</b>	<b>8,014,855</b>	<b>100.0%</b>	<b>\$132.90</b>	<b>938</b>	<b>14.17¢</b>

AUS					
Airline	CY 2009 O&D Pax	CY 2009 Passenger Share %	CY 2009 Avg Net One Way Fare	CY 2009 Avg Ticket Miles	CY 2009 Ticket Yield
AA	1,649,789	22.2%	\$160.92	1,163	13.83¢
AS	72,717	1.0%	\$163.13	1,755	9.29¢
B6	398,580	5.4%	\$156.18	1,431	10.92¢
CO	718,497	9.7%	\$171.40	1,185	14.47¢
DL	712,312	9.6%	\$183.57	1,225	14.99¢
F9	214,631	2.9%	\$109.90	1,065	10.32¢
UA	414,008	5.6%	\$180.95	1,369	13.22¢
US	358,499	4.8%	\$169.30	1,375	12.31¢
WN	2,878,439	38.8%	\$128.93	860	15.00¢
<b>Total</b>	<b>7,417,471</b>	<b>100.0%</b>	<b>\$151.70</b>	<b>1,095</b>	<b>13.85¢</b>

PIT					
Airline	CY 2009 O&D Pax	CY 2009 Passenger Share %	CY 2009 Avg Net One Way Fare	CY 2009 Avg Ticket Miles	CY 2009 Ticket Yield
AA	382,243	5.3%	\$167.11	1,304	12.82¢
B6	177,118	2.5%	\$94.15	504	18.70¢
CO	434,645	6.0%	\$162.41	1,263	12.86¢
DL	1,188,367	16.5%	\$150.27	1,017	14.78¢
FL	672,175	9.3%	\$98.35	934	10.53¢
U5	42,350	0.6%	\$110.25	961	11.48¢
UA	677,681	9.4%	\$169.01	1,258	13.43¢
US	2,092,524	29.0%	\$146.23	921	15.88¢
WN	1,478,134	20.5%	\$110.59	931	11.88¢
YX	75,071	1.0%	\$132.07	709	18.62¢
<b>Total</b>	<b>7,220,308</b>	<b>100.0%</b>	<b>\$137.52</b>	<b>999</b>	<b>13.76¢</b>

The following tables indicate the nonstop city pair comparison at MSY with airports of similar size, which for this analysis are RDU, AUS, and PIT. The summarized data 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, AirTran, and Southwest. The following data is based on CY 2011 data.

MSY									
O&D Market Rank	Market	Psg	Net OW Fare	Ticket Yield	Avg. Passenger Trip Length	Nonstop Service	< 750 Miles	> 750 Miles	Low Fare Carrier Present
1	HOU	372,020	\$133.34	43.98¢	303	Y	X		WN
7	IAH	243,361	\$151.47	49.55¢	306	Y	X		-
38	BHM	52,285	\$124.14	35.40¢	351	Y	X		WN
67	MEM	18,741	\$268.30	62.21¢	431	Y	X		-
2	ATL	295,812	\$130.99	30.10¢	435	Y	X		FL
5	DAL	261,726	\$145.63	32.67¢	446	Y	X		WN
17	DFW	159,303	\$142.62	31.15¢	458	Y	X		-
20	BNA	124,763	\$142.75	28.53¢	500	Y	X		WN
18	TPA	158,177	\$144.07	26.16¢	551	Y	X		WN
9	MCO	214,812	\$150.62	24.32¢	619	Y	X		WN
29	CLT	93,056	\$166.97	24.24¢	689	Y	X		-
22	MIA	112,674	\$165.51	22.67¢	730	Y	X		-
30	STL	92,186	\$175.29	22.49¢	779	Y		X	WN
21	FLL	122,804	\$161.76	20.71¢	781	Y		X	WN
50	CVG	36,744	\$190.48	24.11¢	790	Y		X	-
24	MCI	103,334	\$136.10	16.60¢	820	Y		X	WN
23	MDW	107,050	\$171.37	19.79¢	866	Y		X	WN
11	ORD	207,937	\$180.70	20.69¢	873	Y		X	-
10	DCA	212,089	\$199.78	19.86¢	1,006	Y		X	-
37	IAD	64,195	\$227.66	22.56¢	1,009	Y		X	-
25	DTW	102,616	\$190.59	18.83¢	1,012	Y		X	-
35	MKE	70,445	\$123.37	12.08¢	1,021	Y		X	FL
40	CMH	49,317	\$160.31	15.60¢	1,027	Y		X	-
6	BWI	260,055	\$148.20	14.28¢	1,038	Y		X	WN/FL
48	CLE	39,432	\$200.57	18.88¢	1,063	Y		X	-
8	DEN	235,212	\$142.31	12.96¢	1,098	Y		X	WN/F9
31	MSP	91,526	\$204.12	17.69¢	1,154	Y		X	-
14	PHL	170,453	\$185.64	15.94¢	1,165	Y		X	-
12	JFK	205,034	\$167.70	14.03¢	1,195	Y		X	B6
15	EWR	166,495	\$205.84	16.88¢	1,220	Y		X	-
4	LGA	272,877	\$169.89	13.74¢	1,236	Y		X	-
26	PHX	99,918	\$181.17	12.76¢	1,420	Y		X	WN
16	BOS	159,332	\$170.54	11.64¢	1,465	Y		X	B6
13	LAS	173,000	\$183.97	11.57¢	1,590	Y		X	WN
44	SLC	45,457	\$237.40	14.79¢	1,605	Y		X	-
3	LAX	292,226	\$217.47	12.60¢	1,725	Y		X	WN
19	SFO	149,955	\$232.67	11.46¢	2,031	Y		X	-

## 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
87	CLT	10,586	\$135.15	103.31¢	131	Y	X		-
48	IAD	40,492	\$255.15	112.14¢	228	Y	X		-
18	DCA	138,498	\$197.06	86.19¢	229	Y	X		-
8	BWI	196,975	\$123.16	46.42¢	265	Y	X		WN
4	PHL	355,884	\$120.12	35.35¢	340	Y	X		WN
3	ATL	365,259	\$126.82	35.45¢	358	Y	X		FL
30	PIT	78,161	\$115.59	29.94¢	386	Y	X		-
7	JFK	231,372	\$109.23	25.44¢	429	Y	X		B6
1	LGA	493,416	\$116.00	26.65¢	435	Y	X		-
46	CVG	40,981	\$211.78	48.03¢	441	Y	X		-
13	EWR	178,071	\$191.50	42.47¢	451	Y	X		-
16	BNA	157,392	\$137.31	28.97¢	474	Y	X		WN
40	CMH	52,679	\$147.92	30.76¢	481	Y	X		-
32	CLE	69,692	\$157.43	32.50¢	484	Y	X		-
6	MCO	247,438	\$133.59	23.91¢	559	Y	X		WN
33	BDL	69,059	\$167.78	29.25¢	574	Y	X		-
47	ALB	40,516	\$166.02	28.46¢	583	Y	X		-
22	DTW	126,337	\$190.64	32.19¢	592	Y	X		-
29	IND	79,550	\$163.36	27.28¢	599	Y	X		-
37	PVD	56,188	\$135.97	22.21¢	612	Y	X		-
12	TPA	183,488	\$141.55	23.11¢	612	Y	X		WN
2	BOS	412,062	\$117.45	18.90¢	622	Y	X		B6
42	MEM	46,721	\$210.18	31.83¢	660	Y	X		-
19	MDW	135,060	\$156.53	23.61¢	663	Y	X		WN
5	ORD	263,026	\$173.29	25.80¢	672	Y	X		-
20	MIA	134,758	\$128.83	17.60¢	732	Y	X		-
15	FLL	172,267	\$122.03	16.56¢	737	Y	X		B6/WN
24	STL	116,863	\$143.13	19.33¢	740	Y	X		WN
52	RSW	36,091	\$148.10	18.86¢	785	Y		X	-
35	MKE	61,471	\$145.17	17.71¢	820	Y		X	F9
23	MSP	125,614	\$207.36	19.92¢	1,041	Y		X	-
25	IAH	106,012	\$240.74	22.67¢	1,062	Y		X	-
9	DFW	192,267	\$224.42	20.67¢	1,086	Y		X	-
10	DEN	189,784	\$167.79	10.78¢	1,556	Y		X	WN
21	PHX	129,112	\$183.32	9.28¢	1,976	Y		X	WN
14	LAS	176,000	\$205.15	9.74¢	2,106	Y		X	WN
11	LAX	185,163	\$216.60	9.18¢	2,359	Y		X	-



# AUS

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
43	IAH	52,115	\$139.64	99.64¢	140	Y	X		-
35	HOU	80,400	\$125.35	84.68¢	148	Y	X		WN
3	DAL	297,726	\$133.75	70.36¢	190	Y	X		WN
19	DFW	128,731	\$130.76	68.37¢	191	Y	X		-
45	HRL	51,089	\$122.53	37.74¢	325	Y	X		WN
28	LBB	94,497	\$118.98	31.83¢	374	Y	X		WN
226	BKG	912	\$154.46	30.46¢	507		X		F9
17	ELP	135,697	\$148.41	26.95¢	551	Y	X		WN
72	MEM	22,165	\$275.81	46.89¢	588	Y	X		-
25	MCI	101,861	\$141.31	20.84¢	678	Y	X		F9
1	DEN	395,343	\$121.37	15.37¢	790	Y		X	F9/WN
21	BNA	110,655	\$164.26	20.60¢	797	Y		X	WN
16	ATL	162,814	\$232.65	27.51¢	846	Y		X	-
7	PHX	214,720	\$165.59	18.16¢	912	Y		X	WN
5	ORD	249,152	\$202.85	20.32¢	998	Y		X	-
34	TPA	81,752	\$184.63	18.36¢	1,006	Y		X	WN
24	MDW	102,887	\$176.51	17.47¢	1,010	Y		X	WN
10	MCO	193,387	\$152.23	14.61¢	1,042	Y		X	B6/WN
41	CLT	71,941	\$186.68	17.26¢	1,081	Y		X	-
60	CVG	30,740	\$192.30	17.71¢	1,086	Y		X	-
20	MSP	117,009	\$238.92	21.45¢	1,114	Y		X	-
18	FLL	135,595	\$153.05	13.33¢	1,149	Y		X	B6/WN
4	LAS	284,339	\$169.97	14.69¢	1,157	Y		X	WN
29	SLC	92,345	\$191.11	16.05¢	1,191	Y		X	-
27	DTW	99,519	\$214.71	17.61¢	1,219	Y		X	-
37	LGB	78,254	\$138.65	11.25¢	1,233	Y		X	B6
15	SAN	169,526	\$180.52	14.44¢	1,250	Y		X	WN
2	LAX	325,198	\$201.14	15.72¢	1,280	Y		X	WN
11	BWI	190,094	\$210.78	15.30¢	1,377	Y		X	WN
31	IAD	89,338	\$295.56	21.40¢	1,381	Y		X	-
9	SJC	199,891	\$188.43	12.46¢	1,513	Y		X	WN
32	OAK	84,514	\$173.24	11.36¢	1,525	Y		X	WN
8	JFK	209,666	\$210.02	13.68¢	1,535	Y		X	B6
14	EWR	178,182	\$257.58	16.78¢	1,535	Y		X	-
6	SFO	246,116	\$207.36	13.33¢	1,555	Y		X	B6
12	BOS	187,265	\$202.16	11.58¢	1,745	Y		X	B6
13	SEA	186,966	\$186.05	9.91¢	1,877	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
235	CLE	680	\$90.52	78.62¢	115	Y	X		
61	IAD	21,264	\$307.89	167.80¢	183	Y	X		
48	DTW	29,319	\$301.35	148.51¢	203	Y	X		
39	DCA	48,186	\$140.56	67.50¢	208	Y	X		
25	BWI	78,517	\$115.76	50.39¢	230	Y	X		WN
70	CVG	16,744	\$279.81	107.02¢	261	Y	X		
3	PHL	337,548	\$108.69	40.36¢	269	Y	X		WN
21	EWB	108,701	\$232.31	71.55¢	325	Y	X		
11	JFK	197,397	\$112.49	32.92¢	342	Y	X		B6
7	LGA	257,297	\$146.88	42.67¢	344	Y	X		
26	RDU	78,161	\$115.59	29.94¢	386	Y	X		
13	MDW	179,337	\$131.05	32.40¢	405	Y	X		WN
9	ORD	224,867	\$159.08	37.60¢	423	Y	X		
19	CLT	122,542	\$190.40	44.15¢	431	Y	X		
33	BDL	66,226	\$150.10	34.42¢	436	Y	X		
23	MKE	88,759	\$121.20	26.87¢	451	Y	X		F9/FL
2	BOS	364,023	\$100.76	20.05¢	503	Y	X		B6
4	ATL	286,701	\$148.55	27.45¢	541	Y	X		FL
27	STL	77,814	\$162.63	25.44¢	639	Y	X		
41	MEM	36,576	\$201.95	27.67¢	730	Y	X		
20	MSP	109,801	\$213.64	27.32¢	782	Y		X	
1	MCO	476,759	\$128.37	14.89¢	862	Y		X	FL/WN
6	TPA	264,464	\$131.91	14.54¢	907	Y		X	FL/WN
15	RSW	163,742	\$139.20	13.97¢	997	Y		X	FL
8	FLL	237,068	\$127.34	12.21¢	1,043	Y		X	FL
30	MIA	68,753	\$156.79	14.43¢	1,086	Y		X	
10	DFW	202,755	\$231.25	20.32¢	1,138	Y		X	
14	IAH	173,135	\$287.34	24.74¢	1,161	Y		X	
16	DEN	160,676	\$220.68	15.92¢	1,387	Y		X	WN
12	PHX	192,104	\$188.58	10.00¢	1,885	Y		X	WN
5	LAS	284,498	\$175.50	8.61¢	2,037	Y		X	WN
17	LAX	149,316	\$268.48	11.90¢	2,256	Y		X	
18	SFO	141,841	\$260.84	10.92¢	2,390	Y		X	

The tables illustrate that Louis Armstrong New Orleans International Airport (MSY) has a very competitive environment for air carriers due to a low fare carrier presence in over 50% of the nonstop city pairs flown at MSY. For the CY 2011, the following are the number of city pairs and percentages associated with the city pairs that have low fare carrier presence for MSY and the comparable airports.

**MSY:** 19 of 37 markets have low fare carrier presence; 51%

**RDU:** 15 of 37 markets have low fare carrier presence; 41%

**AUS:** 24 of 37 markets have low fare carrier presence; 65%

**PIT:** 14 of 33 markets have low fare carrier presence; 42%

## **SUMMARY**

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

Similarly, NOAB identifies markets with potentially higher average fares and brings it to a low-cost carrier's attention, such as Dallas/Fort Worth and Newark. Starting in 2013, these two routes once monopolized by legacy carriers, will in addition be served by two low-cost carriers, Spirit and Southwest Airlines which will bring down fares due to competition and will offer passengers additional options when travelling.

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