



### PIT passenger recovery lags national upturn

**Background:** In March, *Policy Brief Vol. 22, No.11*, reported that Pittsburgh International Airport's (PIT) passenger count recovery from the pandemic was lagging the national pace in January 2022. This *Policy Brief* updates the passenger count recovery from 2019 (pre-pandemic levels) through March 2022. Note that PIT passenger monthly data are released with a month or more delay while Transportation Security Administration (TSA) national passenger data are available on a daily basis.

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#### *PIT March statistics*

In early May, PIT released data for airport operations during March. Total passengers, domestic and international, rose to 674,115 during the month and were up almost 88 percent from the COVID-19 depressed reading posted in March 2021. However, the March 2022 passenger total remained 19.5 percent below the March 2019 pre-pandemic level. In line with this drop, aircraft operations were down 12.3 percent from March 2019.

On a more positive note, cargo at PIT is up a very solid 29.5 percent since 2019 and 12.1 percent from 2021. Meantime, mail is also up 25.2 percent from 2019 but did drop 9 percent from the 2021 reading. The increase in cargo could be supporting aircraft operations numbers.

#### *Comparisons to national air travel*

Through March, TSA checkpoint data—a daily count of passengers entering the gate area of the nation's airports—showed a 12.4 percent decline from the March 2019 level. By comparison PIT's March count was down 19.5 percent from March 2019. As was noted in the March *Policy Brief*, “for smaller airports without major hub carriers such as PIT, the TSA checkpoint data are a reasonable proxy for national air travel and to use for comparison to passenger counts at PIT.”

PIT's weaker than national passenger count recovery from 2019 in March continues the pattern that began in December 2021. During most of the second half of 2021, the TSA's

national monthly percentage shortfall from the same months in 2019 and PIT’s percent lack of recovery in 2021 over 2019 were very close. But, in December 2021, the national TSA count compared to 2019 held close to November’s 16 percent while PIT saw the gap with the December 2019 reading rise to 22.2 percent, a jump from November’s 16.2 percent.

The monthly pattern since December shows PIT lagging well behind the national data in terms of recovery toward the pre-pandemic passenger levels of 2019. The table shows the data for PIT and TSA.

Percent difference passenger count		
	National TSA checkpoint count	PIT
December 2021	-16.2	-22.2
January 2022	-22.5	-30.4
February	-15.6	-27.1
March	-12.4	-19.5
April	-9.5	NA

The December through March data indicates PIT is lagging well behind the national closing of the gap with 2019 travel. For the three months of 2022 the average gap is 8.8 percentage points. The trend at both the TSA and PIT has been positive with smaller percentage shortfalls since January. Since the TSA data for April is available it is shown in the table. The 9.5 percent gap with 2019 is the smallest since the pandemic hit. Thus, if the pattern holds, PIT should also see a significant improvement in the April figures relative to 2019 when they are released.

### *Lost growth*

Bear in mind that the recent passenger numbers still trail 2019 postings by significant margins. And what is worse, nationally, air travel was up 13 percent in the three years from 2016 through 2019. And over the 10 years from 2009 to 2019, travel rose over 37 percent. If air travel had grown just 2.5 percent per year since 2019 instead of having to bounce back from the COVID created plunge, 2022 passenger counts would be nearly 8 percent higher than 2019 or 20 percent above the recent March level.

On an annual basis, PIT’s passenger growth was 17.7 percent from 2016 to 2019 and 8.8 percent from 2017 to 2019 with most of the growth occurring in 2017 and 2018 while 2019 saw very little total growth and a big decline in international travel. If growth had continued at a comparatively slow pace of just 3 percent—well under the rate for the three years through 2019—PIT’s passenger count should be up at least 9 percent compared to 2019. Instead in March it was still short by 19.5 percent. That suggests the passenger count is almost 30 percent shy of where it would have been absent the pandemic and slow recovery since.

### *Factors affecting PIT passenger recovery*

There are three factors that have likely played a substantial role in the relatively slow recovery of travel at PIT compared to the national upturn. One, much of the strong growth in the years just prior to, and through part of, 2019 was artificially boosted by an array of airline subsidies to carriers such as Condor, WOW, Delta, OneJet and Alaska Airlines.

Two, population growth in the Pittsburgh region has been essentially stalled and in 2020 was 2.6 percent below the 2000 count. Thus, the number of potential local fliers can grow only if a higher percentage of the population can be induced to use air travel. That can be done to some extent through subsidizing ticket costs or possibly having more desirable destination offerings. Travel can also be enhanced by more arrivals of non-residents. But that depends on having reasons to visit, something the airport can do little to change.

The third factor is employment growth. In that regard, the Pittsburgh region is not in good shape at all. From 2000 to 2019 private employment rose only 5.8 percent. And in March 2022 the job total was 8,300 lower than in March 2001 and still 5.1 percent under the three-year earlier employment number.

Without a major hub carrier, the passenger count at PIT will depend heavily on the local population, employment and income. Passengers arriving at PIT will depend substantially on friends and relatives coming to the region for personal visits, tourists and persons on business trips. No doubt COVID has had a massive effect on tourism and business travel. Moreover, lack of significant population growth and paltry employment gains do not bode well for future air travel gains.

### *Outlook*

In the near term, the concerns over pilot shortages that are causing flight cancellations and discontinued flights do not bode well for significant gains in air travel. But likely more important is the sharp rise in fuel costs that will lead to higher ticket prices. The increased likelihood of higher interest rates over the coming months as the Federal Reserve acts to slow inflation almost certainly points to a weaker economy and less air travel.

In short, it looks like a bumpy ride over the next several months.

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