Airport Profile

Gainesville Regional Airport

Gainesville Regional Airport (GNV) is located in Alachua County, Florida about three miles northeast of Gainesville, Florida. This airport constructed by the United States Army Corps of Engineers in 1941 and was known as the Alachua Army Airfield.

Gainesville is home to the University of Florida, a major division I university with over 52,000 students in 2015 according to the UF Office of Institutional Planning and Research. GNV is in a prime location to serve the students, faculty, and athletic teams traveling to and from the university.

GNV had its highest number of annual enplanements and passengers in 2015, continuing the increasing trend from 2014. Despite the increase in enplanements and passengers, GNV decreased its service to four domestic destinations in 2015.

2015
BY THE NUMBERS

217,358
Enplanements

213,120
Passengers

$232.93
Average Fare

4
U.S. Cities Served

2
Intrastate Destinations

FDOT

Data Explanation

For this report, three key data sources were used: *Passenger Origin-Destination Survey* from the U.S. Department of Transportation, the Official Airline Guide (OAG) and Airline Reporting Corporation (ARC). In this profile, data are combined and compared in order to identify general trends about the airport, as well as offer certain analysis on the findings. A description of these data sources is presented below. Throughout the text, the data sources will be further explained, but this section provides a general overview of the data used in the development of this Airport Air Service Profile.

Air Passenger Origin and Destination (O&D) Survey

DB1B Coupon: The Airline Origin and Destination Survey (DB1B) is a 10 percent sample of airline tickets from reporting carriers collected by the Office of Airline Information of the Bureau of Transportation Statistics. Data from this source provides coupon-specific information for each domestic itinerary of the Origin and Destination Survey.

T-100 Domestic Market: This data source contains domestic market data reported by both U.S. and foreign air carriers, including carrier, origin, destination, and service class for enplaned passengers, freight and mail when both origin and destination airports are located within the boundaries of the United States and its territories.

Official Airline Guide (OAG)

OAG data were summarized as weekly averages for the reported year. All OAG data are for direct flights and represents statistically significant samples of data.

Airline Reporting Corporation (ARC)

The data provided by this source represent a statistically significant and representative sample of airline tickets purchased with a consumer form of payment through an ARC-accredited agency, including major online travel agencies (OTAs), such as Expedia, Orbitz, and Travelocity.

The data represent a 10 percent sample, an industry standard sample size, of passengers from participating agencies. Passenger volumes represented by the data can vary significantly by individual markets, depending on several factors including, but not limited to, the following: 1) the overall composition of air travelers (leisure vs. business); 2) the presence of carriers whose distribution is more heavily weighted toward the direct vs. agency channel (e.g. low cost carriers); and 3) the presence of carriers with limited participation in the ARC settlement system (e.g. Southwest Airlines).

The data used represent passengers and zip codes from where in Florida tickets were purchased. The data include purchases from Florida zip codes only. Because the data in this document represent consumer purchases of airline tickets, there is a natural bias toward leisure and unmanaged business travel behavior and may not account for all business travel. There also may be limitations due to misrepresentation of the passenger information in instances where a person from one zip code purchased a ticket for another person in a different zip code.

Airline Reporting Corporation (ARC) did not assist in the preparation of this analysis, all analyses disclosed herein were performed by Kimley-Horn and Associates, INC., the consultant to the Florida Department of Transportation, Central Aviation Office.

Gainesville Regional Airport Air Service Summary

Introduction

Gainesville Regional Airport (GNV), originally established as John R. Alison Airport in 1942, has long served as a convenient gateway for visitors to reach Central Florida. It was not until 1977 that the airport renamed itself in order to recognize the role that the airport was playing on a regional level. Currently, GNV has two runways of 4,158 feet and 7,504 feet which together served 217,358 total enplanements in 2015.
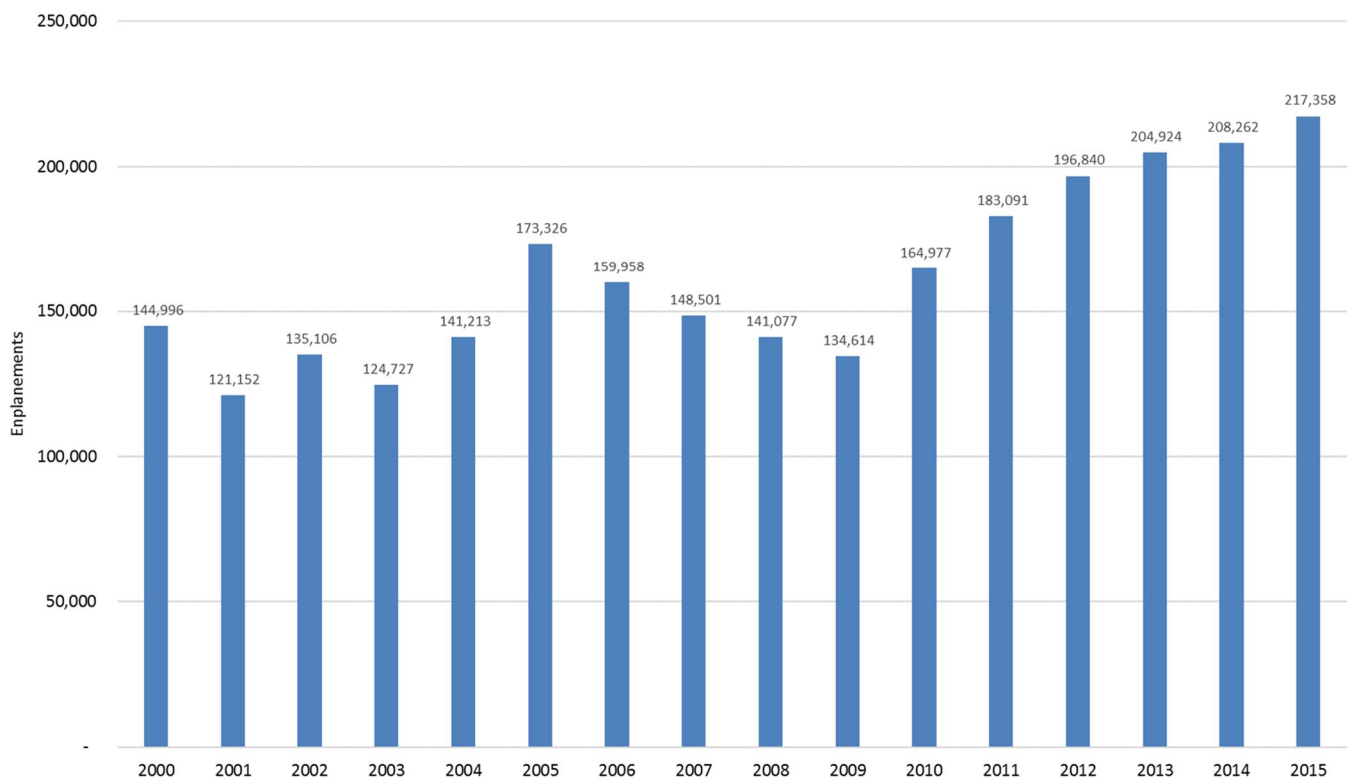
GNV is located in the Northeast Continuing Florida Aviation System Planning Process (CFASPP) region as well as FDOT District Two. The only other commercial service airport in this region and district is Jacksonville International Airport (JAX). This airport profile will illustrate statistical data about GNV including: annual enplanements, local population data, and many other metrics. The following statistical information will provide a description of the most recent overall performance of GNV and how that compares to previous years' performance.

 More information about GNV can be found at: http://www.gra-gnv.com/

Enplanements

Figure 1 represents total annual enplanements at GNV between 2000 and 2015. This data shows the significant increase in enplanements between 2009 and 2015 at GNV. GNV had 217,358 enplanements in 2015 compared to 134,614 in 2009, an increase of 61 percent. This rapid growth in annual enplanements suggests increasing demand for operations at GNV.
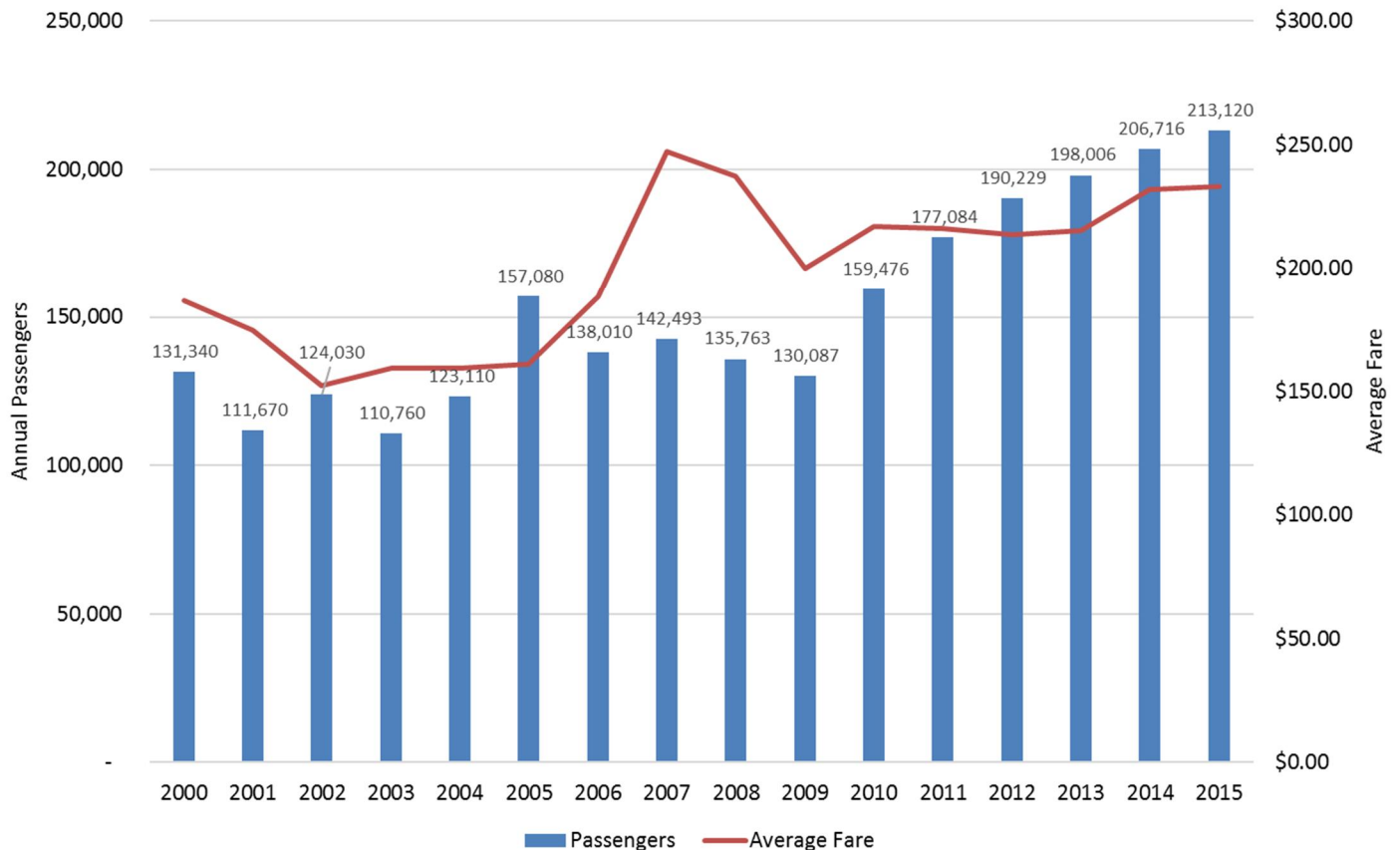
Figure 1. Annual Enplanements[1]

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[1] Annual airport passenger traffic reports, provided by FDOT

Passengers and Fares

Gainesville Regional Airport has seen a steady rise in annual passengers over the past seven years. In fact, 2015 marked a record high in annual passengers at 213,120. This is roughly a 7,000 passenger increase from the passenger count in 2014. The average fare at GNV has also increased in recent years, reaching $232.93 in 2015. This is nearly a $30 increase from 2009 although still below the high point in 2007 at $247.17. **Figure 2** displays the annual passengers and annual average fare at GNV.

Figure 2. Annual Domestic Passengers and Average Fares[2]

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[2] U.S. Department of Transportation (U.S. DOT) Bureau of Transportation Statistics (BTS) O&D Survey & T-100 Domestic Market All Carriers

Domestic Destination Airports

GNV served four destinations throughout the U.S. in 2015. Two of these destinations were located within the state of Florida. These destinations included:

- Orlando International Airport (MCO) – 13 average flights per week
- Miami International Airport (MIA) – 10 average flights per week

However, the majority of flights departing GNV were bound for Hartsfield-Jackson Atlanta International Airport (ATL) and Charlotte Douglass International Airport (CLT). ATL (45 average flights per week) is known as being one of the busiest airports in the world as well as being the primary hub for Delta Air Lines. Additionally, CLT (27 average flights per week) is well known for being a hub for American Airlines and a gateway for many flights in the Southeast. **Figure 3** displays GNV's nonstop domestic destinations.

Domestic Routes

Figure 4 displays GNV's top ten domestic routes. For purposes of this study, a route is the complete path taken by passengers from the starting airport (in this case GNV) to their final destination. The routes from GNV shown below had the most frequent passengers traveling on them in 2015. Three of these routes were direct flights:

- Miami International Airport (MIA)
- Charlotte Douglas International Airport (CLT)
- Hartsfield-Jackson Atlanta International Airport (ATL)

One of the direct flight routes are to other airports in the state of Florida. The other non-direct flight routes connected through ATL and CLT to reach their final destination. The final destination of routes that connected through ATL and CLT included:

- LaGuardia Airport (LGA) – ATL & CLT
- Reagan National Airport (DCA) - CLT
- Baltimore-Washington International Airport (BWI) - CLT
- Newark Liberty International Airport (EWR) – CLT
- Boston Logan International Airport (BOS) - CLT
- Denver International Airport (DEN) – CLT

This analysis represents the intention of travel of the majority of passengers flying out of GNV. It should be noted that the majority of these airports are in the Northeast region of the U.S. Therefore, the appropriate conclusion is that the majority of passengers who travel from GNV are ultimately bound for the Northeast region of the U.S.

Figure 3. GNV's Nonstop Domestic Destinations[3]

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[3] The Official Airline Guide (OAG)

Figure 4. Domestic Routes[4]
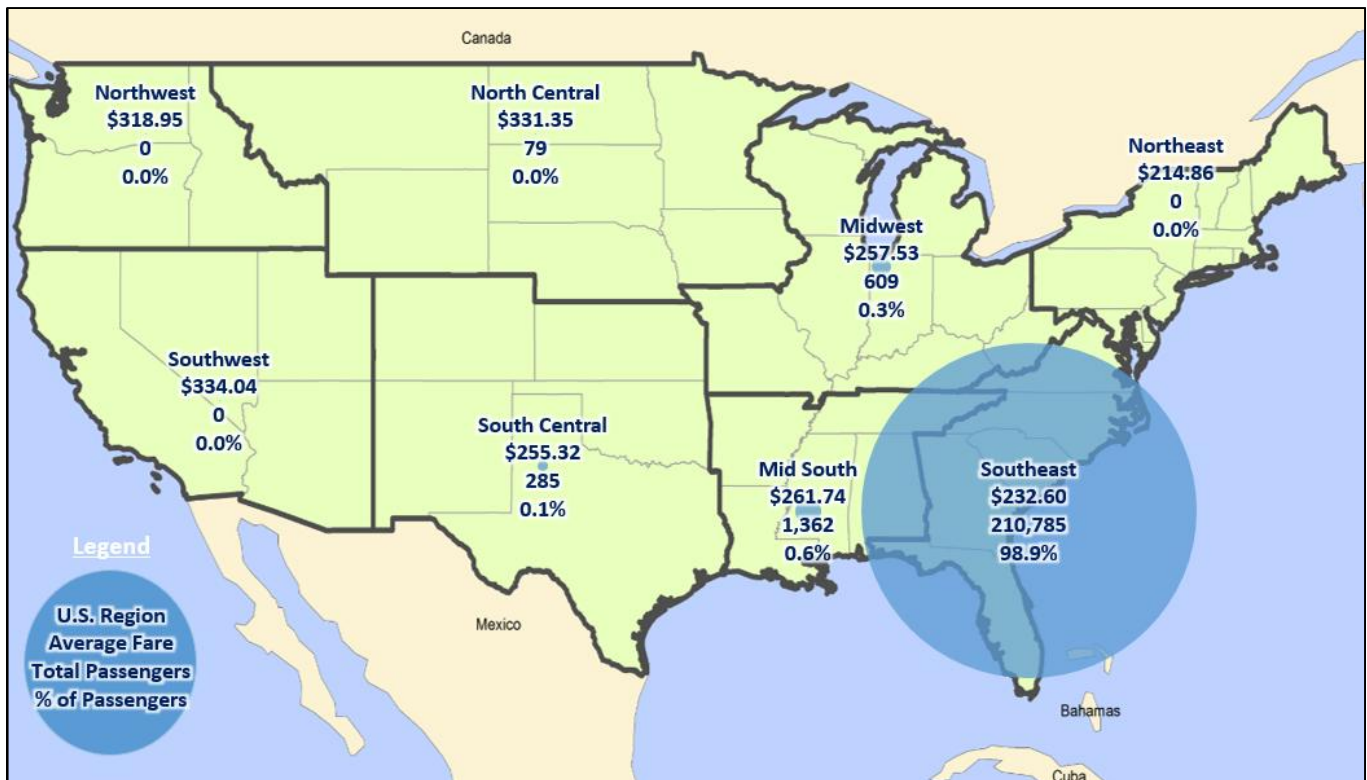
Domestic Regional Analysis

Figure 5 displays the average fare, number of passengers, and percentage of total passengers departing GNV and bound for each of the eight regions of the United States. The data shows that 98.9 percent of passengers departing GNV were bound for destinations in the Southeast region. The Southeast region contains Hartsfield-Jackson Atlanta International Airport (ATL) which received the majority of GNV's flights in 2015. ATL is known for being one of the world's busiest airports as well as the primary hub for Delta Air Lines. Additionally, CLT lies within the southeast region, adding to the high percentage. It should be noted that **Figure 5** incorporates Florida airports into the southeast region, therefore adding GNV's intrastate service to the southeast percentage. The mid south region received the second most passengers from GNV in 2015 at 0.6 percent.
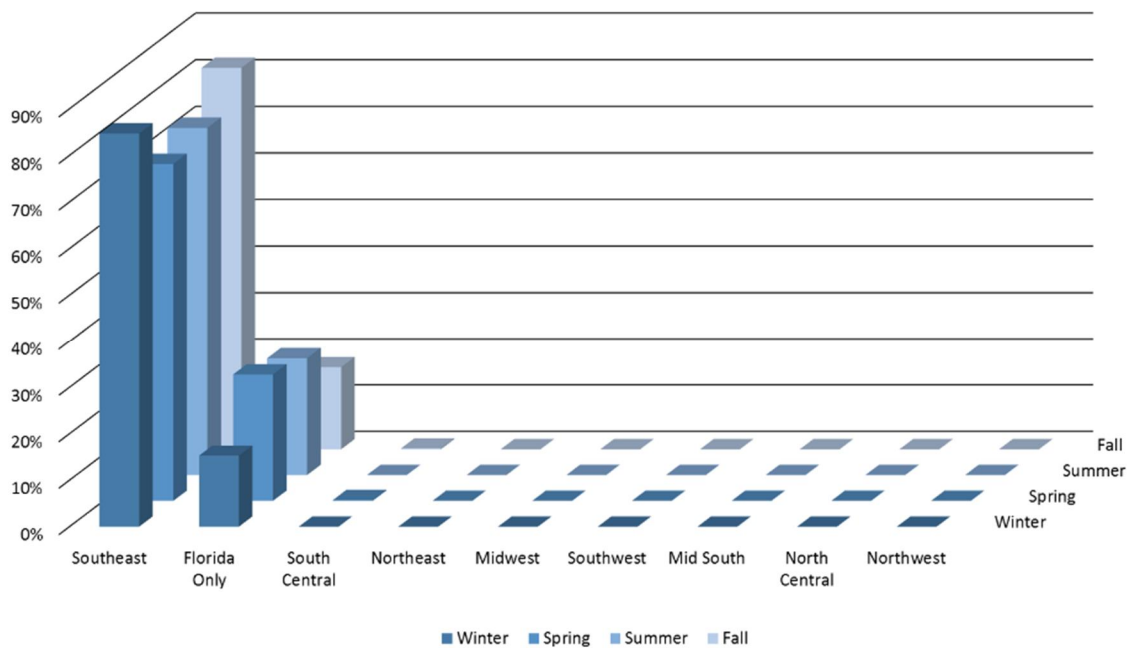
Figure 5. Domestic Passengers and Fares[5]

[5] The Official Airline Guide (OAG)

Seasonal Flight Comparison

The data shown below in **Figure 6** further supports the identification of major routes to ATL and airports in Florida. For all four seasons of the year, the majority of flights, were bound for the Southeast region of the U.S where ATL is located. In the Spring, flights to the southeast region reduced, and flights to airports in Florida increased. This data also confirms that GNV does not serve regions outside of the Southeast at any point of the year.

Figure 6. Season by Region Analysis[6]

Average Load Factors

Average load factors represent the number of passenger miles traveled as a proportion of available seat miles. Higher average load factors represent more total passenger boardings. The average load factor at Gainesville Regional Airport was 82.68, which precisely meets the U.S. average, 82.68, for 2015. Load factor statistics were derived from the Bureau of Transportation Statistics (BTS) T-100 segment data for the years 2014 and 2015. A summary of 2014 and 2015 average load factors is shown in **Table 1**.

Table 1. Average Load Factor Analysis[7]

Year	Domestic	International	Total
Miami International			
2014	80.87	n/a	80.87
2015	82.68	n/a	82.68
All U.S. Airports			
2014	84.49	81.03	82.69
2015	84.98	80.61	82.68

[6] The Official Airline Guide (OAG)
[7] The Bureau of Transportation Statistics (BTS) T-100 Data

On-Flight Market Freight Statistics

Freight statistics represent the total number of pounds of freight, property other than mail and passenger baggage, transported by air **from** a given airport. In 2015, GNV shipped 10,343 pounds of freight, a roughly 2,000-pound decrease from 2014. A summary of 2014 and 2015 on-flight market freight statistics is shown in **Table 2**. Freight statistics were derived from the Bureau of Transportation Statistics (BTS) T-100 segment data for the years 2014 and 2015.

Table 2. GNV Freight[8]

Year	Freight (in pounds)
2014	8,209
2015	10,343

On-Flight Market Mail Statistics

Mail statistics represent the total number of pounds of U.S. and foreign mail shipped from a given airport. GNV had a surge of mail shipped from the airport in 2015. A summary of 2014 and 2015 on-flight market mail statistics is shown in **Table 3**. Mail statistics were derived from the Bureau of Transportation Statistics (BTS) T-100 segment data for the years 2014 and 2015.

Table 3. GNV Mail[9]

Year	Mail (in pounds)
2014	0
2015	3,900

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[8] The Bureau of Transportation Statistics (BTS) T-100 Segment Data
[9] The Bureau of Transportation Statistics (BTS) T-100 Table Data

Market Leakage Study

Introduction

Florida has the highest number of large hub airports (4) of any state in the U.S. Florida also has many commercial service airports (20), which compete over the same potential passengers. There are many factors that play into the decision-making of passengers, ranging from cost to airport proximity to how direct a flight is. Because of these factors, many smaller commercial airports in Florida experience market leakage, or a loss of passengers who choose to drive further distances to airports for various reasons, such as less expensive flights or more convenient flight options. For large airports located in large metropolitan areas leakage may be a less significant factor because they still carry large numbers of passengers. Conversely for smaller airports the loss of passengers to larger airports may potentially be more significant. This analysis looks at tickets purchased in Florida zip codes to see which Florida airports may lose business due to market leakage. The market leakage study analyzes zip codes from where a ticket was purchased and subsequently which airport was departed from for that purchase. To better understand the market leakage findings, key demographic data are presented as part of the market leakage study.

Metropolitan Statistical Area (MSA)

According to the U.S. Census, an MSA is "*a geographic entity based on the concept of a core area with a large population nucleus, plus adjacent communities having a higher degree of economic and social integration with that core.*" Per this definition, looking at populations, employment, and other important factors at the level of an MSA, should prove beneficial in better understanding the area. GNV is the only commercial service airport in the Gainesville MSA. This MSA is one of the smaller in the state in terms of MSAs with commercial service, but has shown steady growth over the past few decades.

Drive Time and Population Analysis

Figure 7 displays the area around GNV that can access the airport with a 90-minute or less drive
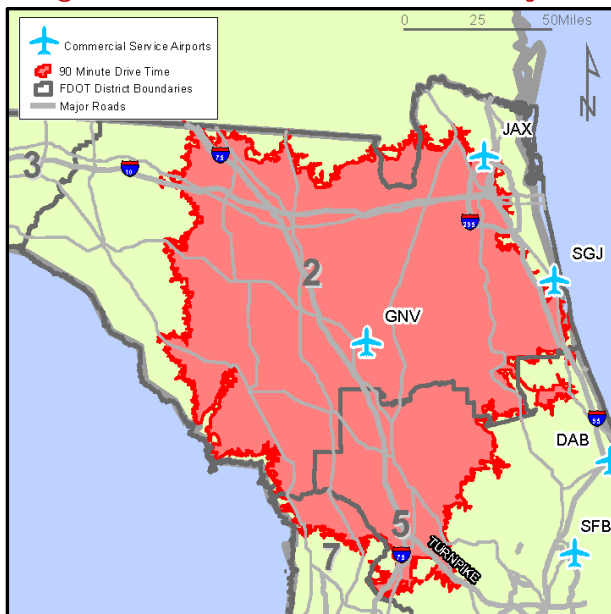
Figure 7. 90 Minute Drive Time Analysis[11]

Table 4. Population Within 90 Minutes[10]

Population Trends	
2010 Total Population	1,935,297
2016 Total Population	2,045,923
2021 Total Population	2,159,946
2040 Total Population	2,654,279
2016-2021 Annual Rate of Change	1.09%
2016-2040 Percent Change	30%

time. Further, **Table 4** displays the population of that area in 2010 and 2016 as well as the projected population in the area for 2021 and 2040. The projected annual rate of change, or growth rate, between 2016 and 2021 of the population in that area is 1.09 percent. With this growth rate, this area is expected to have a 30 percent growth in population by the year 2040. Therefore, by the year 2040, it is anticipated that 2,654,279 people will have a 90 minute or less drive time from their homes to GNV.
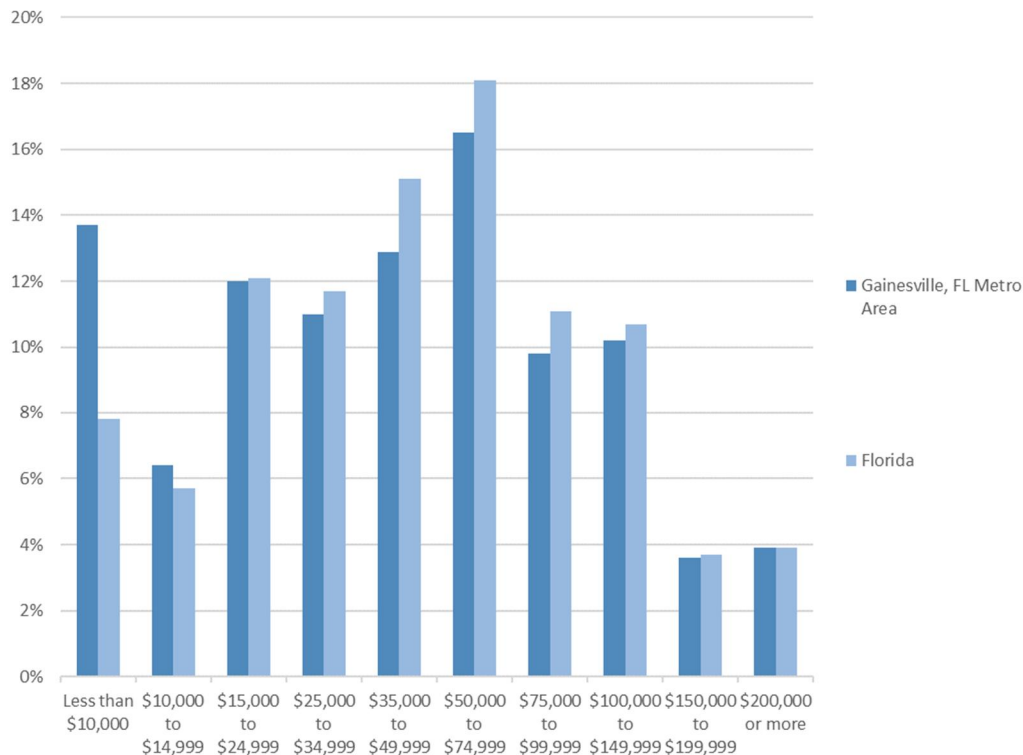
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[10] U.S. Census Bureau, Census 2010 Summary – ESRI Housing Profile
[11] U.S. Census Bureau, Census 2010 Summary – ESRI Housing Profile

Income Levels

The income distribution in the Gainesville MSA follows unique trends when compared to other MSA's in the state. The income in an area may impact the demand for air travel in an area. In an area that has a relatively high number of high income households, more people may be willing to pay more in air fare in order to have a shorter drive to the airport. In lower income areas, people are more likely to drive a greater distance for air travel in order to capture reduced fares. Many other factors affect airports other than income, and in an area that has multiple large hub commercial airports within a relatively close proximity, there may be a multitude of reasons that a household may choose to use a given airport. A summary of income data for the MSA are in **Figure 8** below. Income data for the MSA and State was derived from the US Census American Fact Finder.

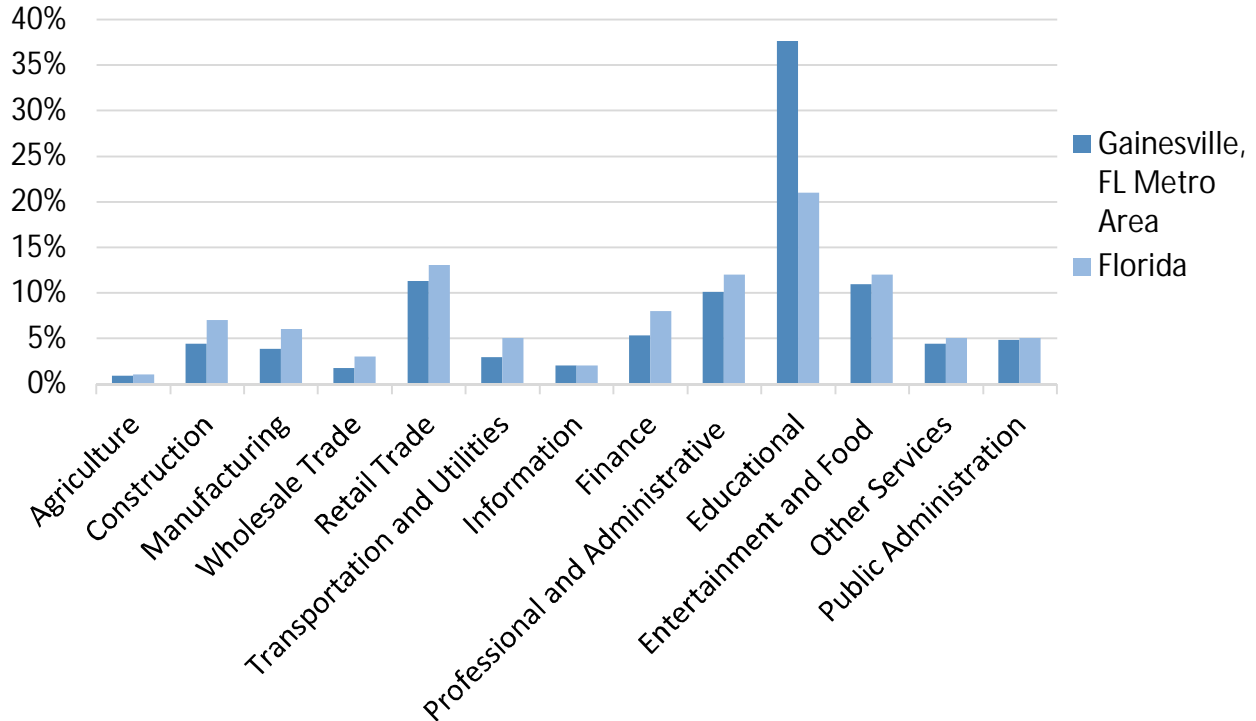Figure 8. MSA and Florida Income Comparison[12]

Employment

The primary types of employment located in an area may influence air travel. For areas that have a large number of companies that participate in professional and financial services, demand for local air travel will likely increase because they are less concerned about the cost of flights and more concerned about ease of access to the airport. In most cases, differences will exist between the county and the state averages, but these discrepancies are generally not large enough to impact commercial air service demand. The Gainesville MSA has a relatively unique relationship with Florida's employment by industry percentages. A summary of employment by industry can be seen in **Figure 9**. As shown, the Gainesville MSA has a high employment percentage in the education industry compared to the rest of the state. This can most likely be attributed to the University of Florida, a large Division I school which is located in Gainesville, Florida.

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[12] U.S. Census American Fact Finder
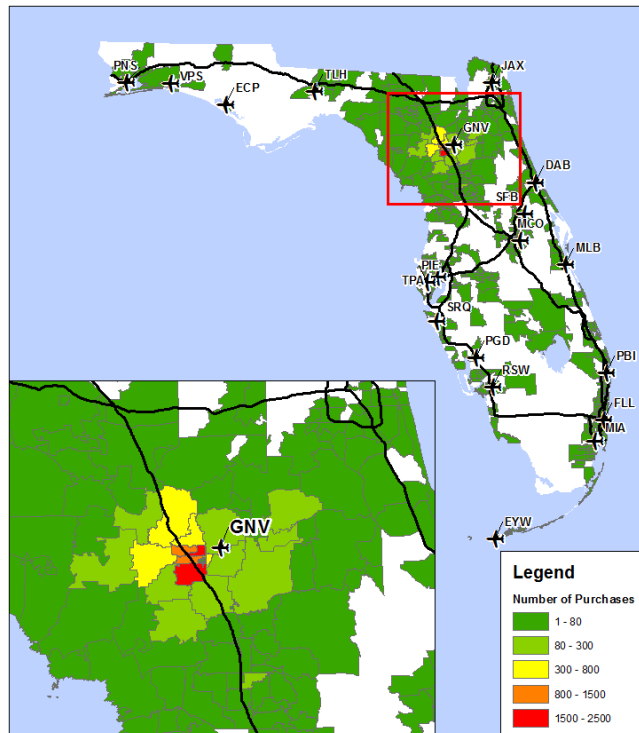
Figure 9. Employment by Industry[13]

Leakage

Figure 10 displays the zip codes in Florida where tickets for flights departing from GNV were purchased. This graphic shows the purchases of tickers primarily in the area surrounding GNV. However, tickets have been purchased for GNV flights from all over the state of Florida. Some areas with noticeable aggregations of ticket purchases include Jacksonville, Daytona, and Miami. The majority of tickets purchased for GNV flights were purchased from in-state locations. In fact, only 28 percent of ticket purchases were from out of state locations. The other states where ticket purchases were made include but aren't limited to:

- New York – 3%
- California – 2%
- Texas – 2%

Based on the market leakage analysis, Gainesville Regional Airport loses a significant number of passengers to
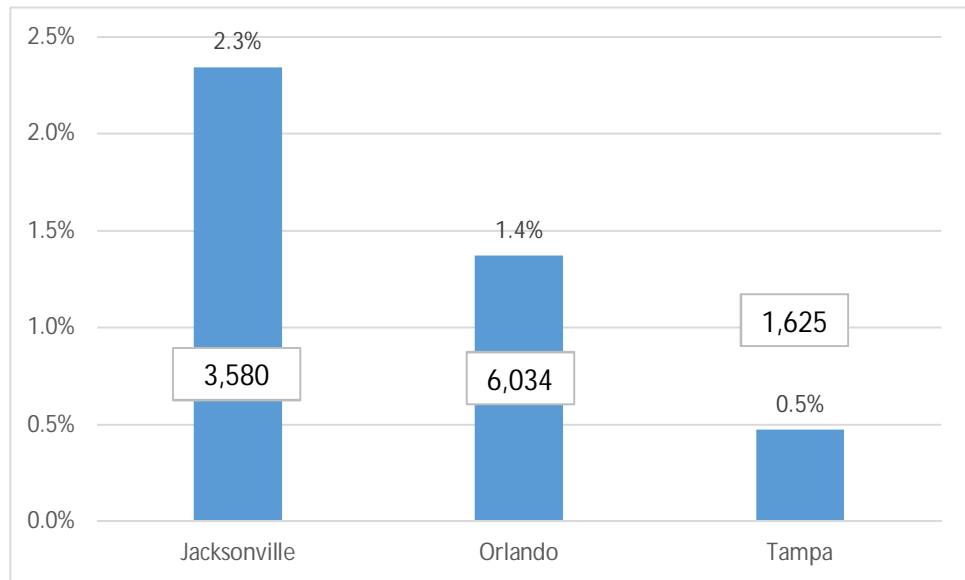
Figure 10. In-state Ticket Purchases[14]

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[13] U.S. Census American Fact Finder

[14] Airline Reporting Corporation (ARC)

Jacksonville International Airport and Orlando International Airport. Of all passengers departing from Jacksonville International Airport, 2.3 percent were from Alachua County. Of all passengers departing from Orlando International, 1.4 percent were from Alachua County. Of all passengers departing from Tampa International Airport, 0.5 percent were from Alachua County. **Figure 11** illustrates three of the

Figure 11. In-state Ticket Purchases[15]
(Represented as a Percentage of the Departing Airports Total Enplanement Volumes in 2015)

top airports that receive leaked passengers from the Gainesville Regional Airport market. The values that are presented represent the number and percent of passengers who purchased their ticket from an Alachua County zip code but flew out of an alternative airport. Data presented are from a 10 percent sample from all months of 2015.

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[15] Airline Reporting Corporation (ARC)