Airport Profile

Pensacola International Airport

Pensacola International Airport (PNS) is located approximately three nautical miles northeast of the central business district of Pensacola, in Escambia County, Florida. The airport is owned by the City of Pensacola and serves a prominent role in Florida's northwestern aviation system.

Pensacola is known as a primary airport for U.S. Naval Aviation training in addition to its commercial service. Pensacola is known as the Cradle of Naval Aviation, and is home to various U.S. Navy Bases which provide flight training for all Naval and Marine aviators. Additionally, the United States Naval Flight Demonstration Team, the Blue Angels, are housed at Naval Air Station Pensacola. Given the volume of military flight training activity taking place in the area, the Pensacola International Airport is a vital resource for the successful completion of the military's training mission. PNS' location surrounded by U.S. Navy facilities and world-famous beaches makes this airport a unique asset to Florida's aviation system.

Enplanements at PNS increased nearly four percent in 2015 to 808,170. This increase could be attributed to addition of four domestic destinations served by PNS in 2015.

Enplanements
808,170

Passengers
787,608

Average One-Way Fare
$233.52

U.S. Cities Served
13

Intrastate Destinations
4

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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.

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Pensacola International Airport Air Service Summary

Introduction

Pensacola International Airport (PNS) began operations as Hagler Field in 1935 with two grass strip runways. Since then, the airport has grown and the facility now serves as both a commercial and general aviation facility. Though the airport has seen many changes throughout the years, including conversion into a naval base during World War II, PNS has become the largest airport in the Northwest Florida region. PNS currently has two runways at 7,000 feet and 7,004 feet in length which collectively had 808,170 enplanements in 2015.

PNS is located in the Northwest Continuing Florida Aviation System Planning Process (CFASPP) region as well as FDOT District Three. Also included in this region are Tallahassee International Airport (TLH), Northwest Florida Beaches International Airport (ECP), and Destin-Ft. Walton Beach Airport (VPS). This airport profile will illustrate statistical data about PNS 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 PNS and how that compares to previous years' performance.

More information about PNS can be found at: http://flypensacola.com/

Annual Enplanements

Figure 1 represents total annual enplanements at PNS between 2000 and 2015. This analysis shows the gradual increase in enplanements over the last six years. Annual enplanements in 2015 were 808,170 compared to 778,233 in 2014, a roughly four percent increase.

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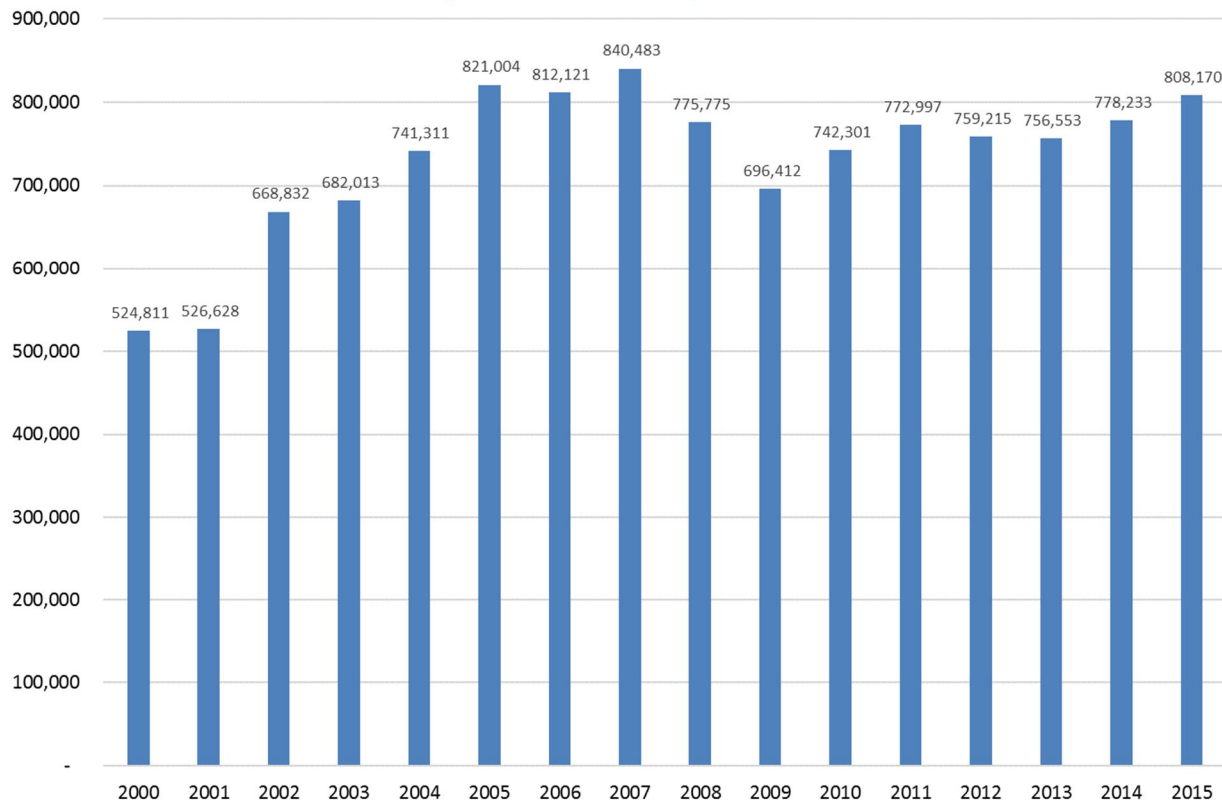
[1] Annual airport passenger traffic reports, provided by FDOT

Passengers and Fares

PNS has experienced an increase in annual enplanements over the past three years. The passenger count for 2015 was marked at 787,608 which is nearly 30,000 more passengers than in 2014. Although there was an increase in annual passengers, the average annual one-way fare increased by about $1.90 to an average price of $233.52. **Figure 2** displays the annual passengers and annual average fare at PNS.

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

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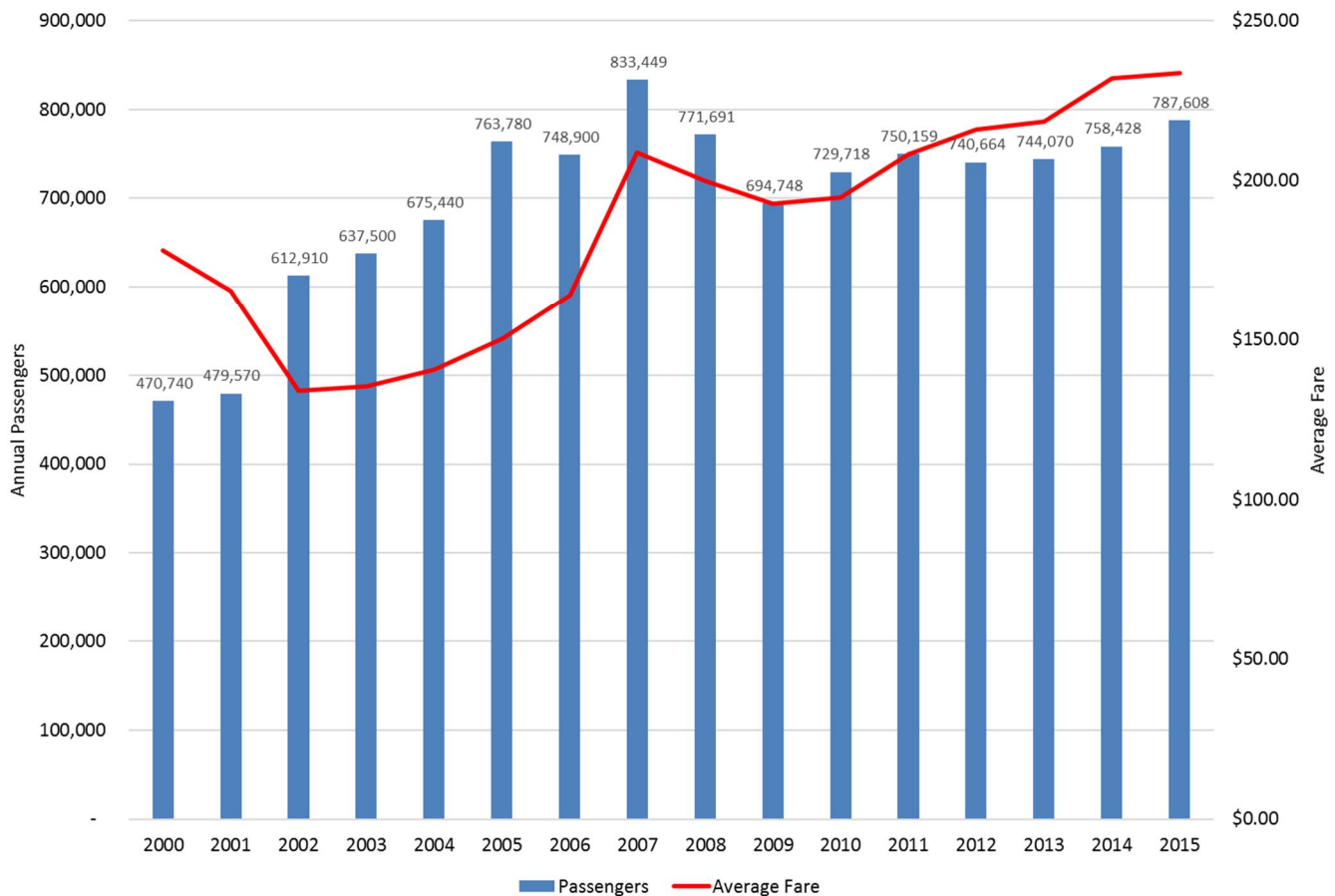
[2] U.S. Department of Transportation (U.S. DOT) Bureau of Transportation Statistics (BTS) O&D Survey & T-100 Domestic Market All Carriers

Domestic Destination Airports

PNS served 13 domestic destinations in 2015. Four of these destinations were located within the state of Florida. These four destinations included:

- Miami International Airport (MIA) – 21 average flights per week
- Tampa International Airport (TPA) – 14 average flights per week
- Orlando International Airport (MCO) – 12 average flights per week
- Jacksonville International Airport (JAX) – 5 average flights per week

These intrastate destinations include three of Florida's four large hub airports. The two primary destinations served by PNS were:

- Hartsfield-Jackson Atlanta International Airport (ATL) - 50 average flights per week,
- Dallas/Fort Worth International Airport (DFW) - 35 average flights per week.

ATL is known as being one of the busiest airports in the world as well as being the primary hub for Delta Air Lines. Additionally, DFW is one of the largest airports in the U.S. and the primary hub for American Airlines. **Figure 3** displays PNS' domestic destinations.

Domestic Routes

Figure 4 displays PNS' 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 PNS) to their final destination. The routes from PNS shown below had the most frequent passengers traveling on them in 2015. Five of these routes were direct flights:

- Orlando International Airport (MCO)
- Miami International Airport (MIA)
- Tampa International Airport (TPA)
- Dallas/Fort Worth International Airport (DFW)
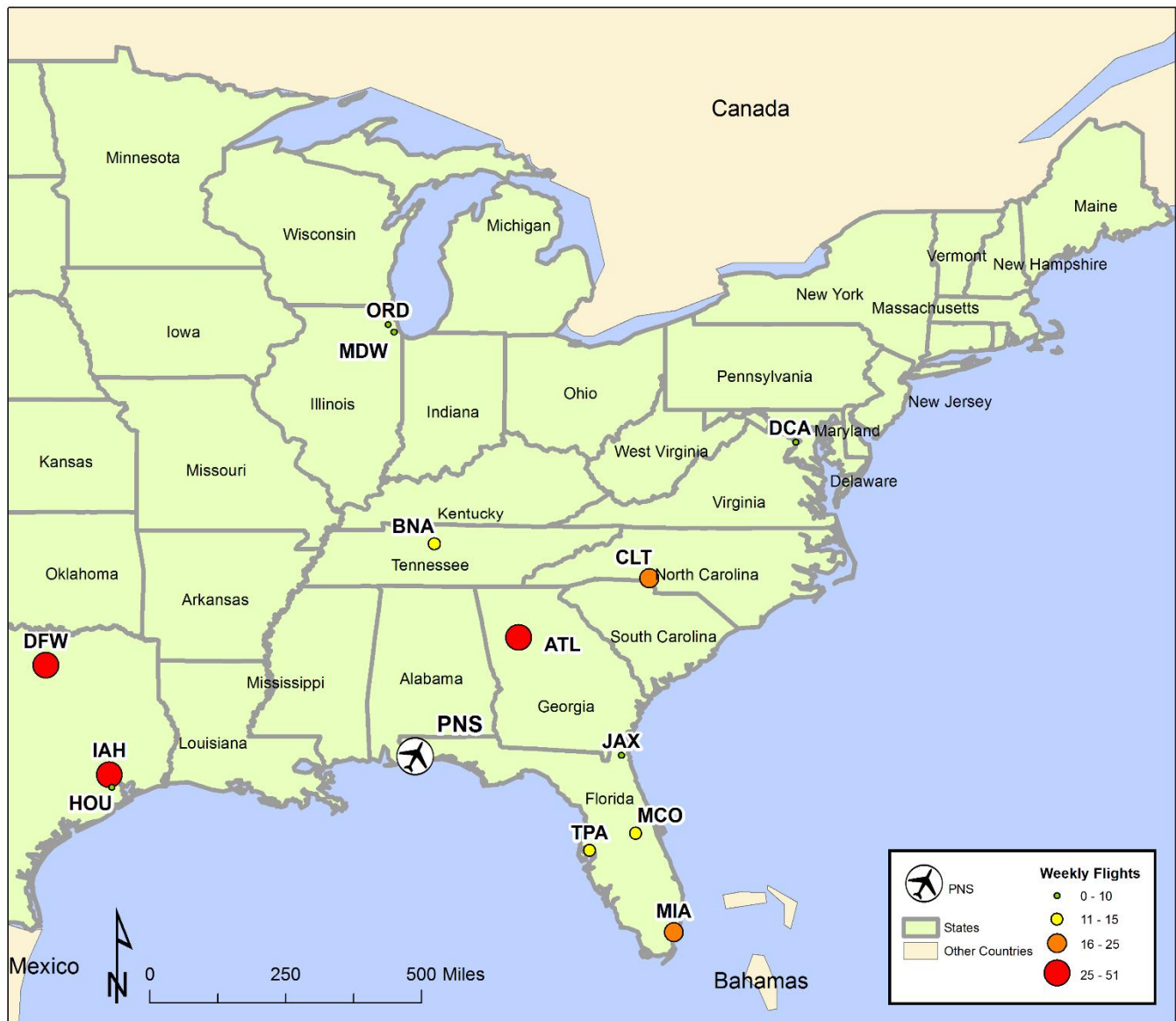- George Bush Intercontinental Airport (IAH)

Three of the direct flight routes are to other airports in the state of Florida. The other non-direct flight routes connected through ATL and Charlotte Douglas International Airport (CLT) to reach their final destination. The final destination of routes that connected through ATL and CLT included:

- LaGuardia Airport (LGA) - ATL
- Chicago O'Hare International Airport (ORD) - ATL
- Ronald Reagan Washington National Airport (DCA) – ATL & CLT
- Baltimore-Washington International Airport (BWI) – ATL

This analysis represents the intention of the majority of passengers flying out of PNS. It should be noted that these airports are primarily in the northeast and southeast regions of the U.S. Therefore, the appropriate conclusion is that the majority of passengers who travel from PNS are bound for those regions of the U.S. Although a large portion of passengers departing PNS are bound for the Northeast region, PNS does not offer many direct flight options to airports in that area.

Figure 3. PNS' Domestic Destinations[3]

Figure 4. Top Domestic Routes[4]

Domestic Regional Analysis

Figure 5 displays the average one-way fare, number of passengers, and percentage of total passengers departing PNS and bound for each of the eight regions of the United States. The data shows that 63.3 percent of passengers departing PNS were bound for destinations in the Southeast region including Hartsfield-Jackson Atlanta International Airport (ATL) which was one of PNS' primary destinations in 2015. Additionally, this map incorporates Florida airports, of which PNS serves five, into the southeast region. The South Central region, which contains DFW, followed with 26 percent of total annual passengers.

Figure 5. Domestic Passengers and Fares[5]
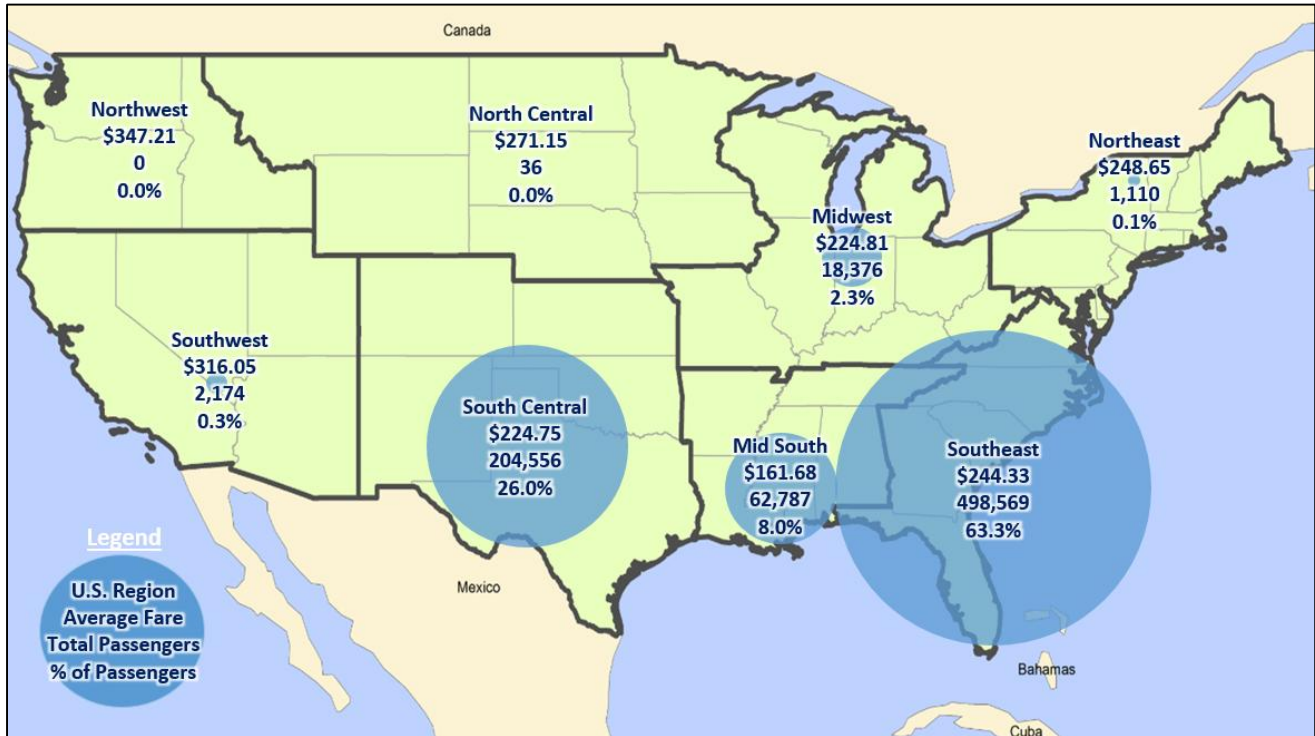
International Flight Departures

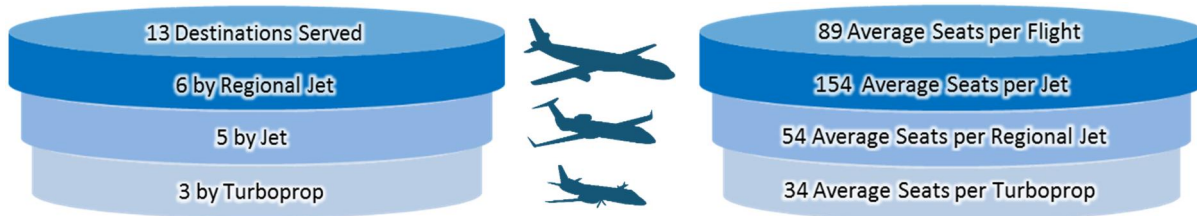PNS did not serve any international destinations in 2015.

Aircraft Type

Of the 13 destinations served by PNS, six were served by regional jet aircraft and five by large jet aircraft. The use of large jet aircraft has a direct impact on the average seats per flight at an airport. Generally larger jet aircraft substantially increase the average seats per flights. **Figure 6** displays the aircraft types that served the 13 destinations from PNS as well as the average seats per flight on each aircraft type

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[5] The Official Airline Guide (OAG)

Figure 6. Aircraft Types and Average Seats per Flight[6]

13 Destinations Served	89 Average Seats per Flight
6 by Regional Jet	154 Average Seats per Jet
5 by Jet	54 Average Seats per Regional Jet
3 by Turboprop	34 Average Seats per Turboprop

Seasonal Flight Comparison

The data shown below in **Figure 7** 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 airports in the southeast region. In the Summer, flights to the southeast airports reduced, and flights to airports in Florida increased substantially. This data also confirms the strong seasonal service to the south central region of the U.S. where DFW is located.

Figure 7. Season by Region Analysis [7]
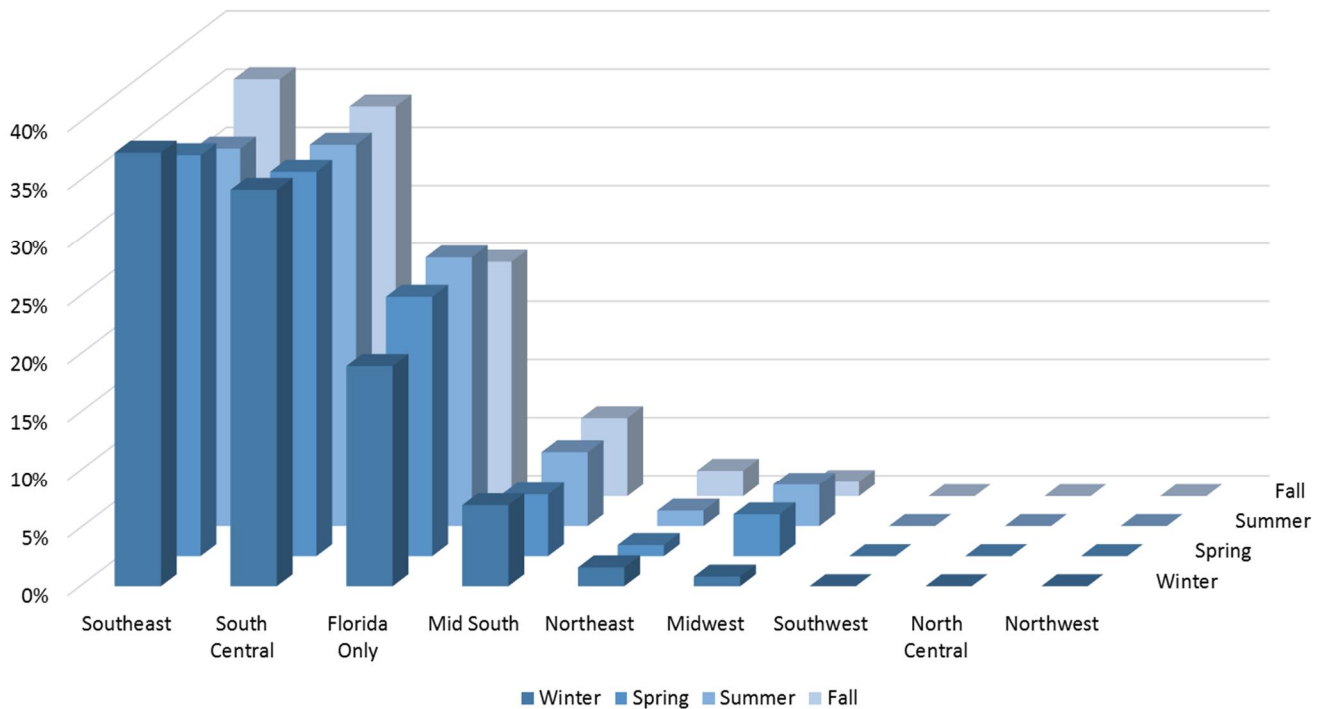
Average Load Factors

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 PNS was 82.63, slightly lower than the U.S. average, 82.68, for 2015. Load factor statistics were derived from the Bureau of Transportation Statistics

Table 1. Average Load Factor Analysis[8]

Year	Domestic	International	Total
Pensacola International			
2014	82.79	74.00	82.79
2015	82.63	n/a	82.63
All U.S. Airports			
2014	84.49	81.03	82.69
2015	84.98	80.61	82.68

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(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**.

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, PNS shipped 4,258,608 pounds of freight, a roughly 87,000 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. PNS Freight[9]

Year	Freight (in pounds)
2014	4,346,305
2015	4,258,608

On-Flight Market Mail Statistics

Mail statistics represent the total number of pounds of U.S. and foreign mail shipped **from** a given airport. PNS shipped 2,440 pounds of mail in 2015, an increase of over 1,300 pounds from 2014. 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. PNS Mail[10]

Year	Mail (in pounds)
2014	1,069
2015	2,440

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[6] The Official Airline Guide (OAG)
[7] The Official Airline Guide (OAG)
[8] The Bureau of Transportation Statistics (BTS) T-100 Table Data
[9] The Bureau of Transportation Statistics (BTS) T-100 Segment Data
[10] 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 for 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 route 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 ticket purchase. To better understand the market leakage findings, key demographic data are presented as part of the market leakage study.

Metropolitan Statistical Area (MSA)

Pensacola International Airport is the only commercial airport in the Pensacola-Ferry Pass-Brent MSA. This MSA has an average population when compared to a majority of MSA's in the state. 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 high degree of economic and social integration with that core.*" Per this definition, looking at population, employment, and other important factors at the level of an MSA, should prove beneficial in better understanding the area. Data are also analyzed at the county level where appropriate.

Drive Time and Population Analysis

Figure 8 displays the area around PNS that can access the airport with a 90-minute or less drive
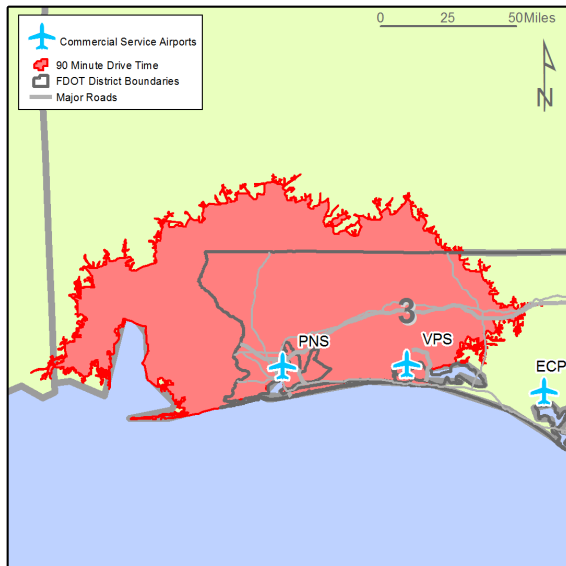
Figure 8. 90 Minute Drive Time Area[12]

Table 4. Population Within 90 Minutes[11]

Population Trends	
2010 Total Population	1,258,335
2016 Total Population	1,338,364
2021 Total Population	1,411,802
2040 Total Population	1,729,546
2016-2021 Annual Rate of Change	1.07%
2016-2040 Percent Change	29%

time. Further, **Table 4** displays the population of that area in 2010 and 2016 as well as a projected population of 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 1.07 percent. With this growth rate, this area is expected to have a 29 percent growth in population by the year 2040. Therefore, by the year 2040, it is anticipated that 1,729,546 people will have a 90 minute

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[11] U.S. Census Bureau, Census 2010 Summary – ESRI Housing Profile
[12] U.S. Census Bureau, Census 2010 Summary – ESRI Housing Profile

or less drive time from their homes to PNS. Therefore, it is anticipated that the demand for air service will increase proportionally in the future.

Income Levels

Income levels for the Pensacola-Ferry Pass-Brent MSA depict a high population within the "middle class" when compared to other MSAs in the state. The income in an area may impact the demand for air travel in an area. In an area that has a comparatively high number of upper income households, more people may be willing to pay more in order to travel a shorter distance to the airport. Conversely, in lower income areas, people may be likely to drive a greater distance for air travel in order to capture reduced fares. A summary of income data for the MSA is shown below in **Figure 9**.

Figure 9. MSA and Florida Income Comparison[13]
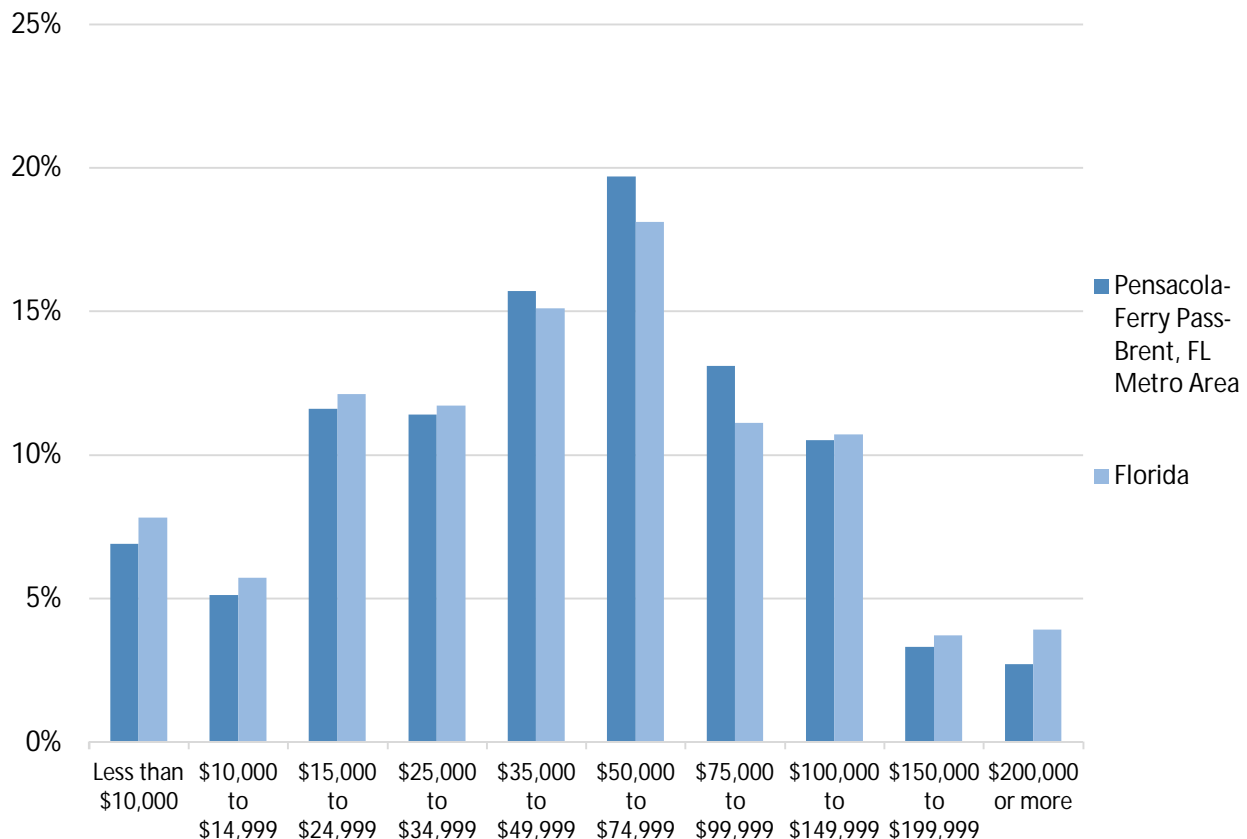
Employment

The type of employment that is located in an area may also have an effect on airline 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 may be 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 MSA and the state averages, but these discrepancies are generally not large enough to impact commercial air service demand. The Pensacola-Ferry Pass-Brent MSA shows differences from the state average for employment by industry group. Specifically, the MSA has a higher percentage of employment in the

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[13] U.S. Census American Fact Finder

educational and retail trade industries. In the entertainment and food industry, the MSA falls below the state average. **Figure 10** below shows the breakdown of employment by industry.
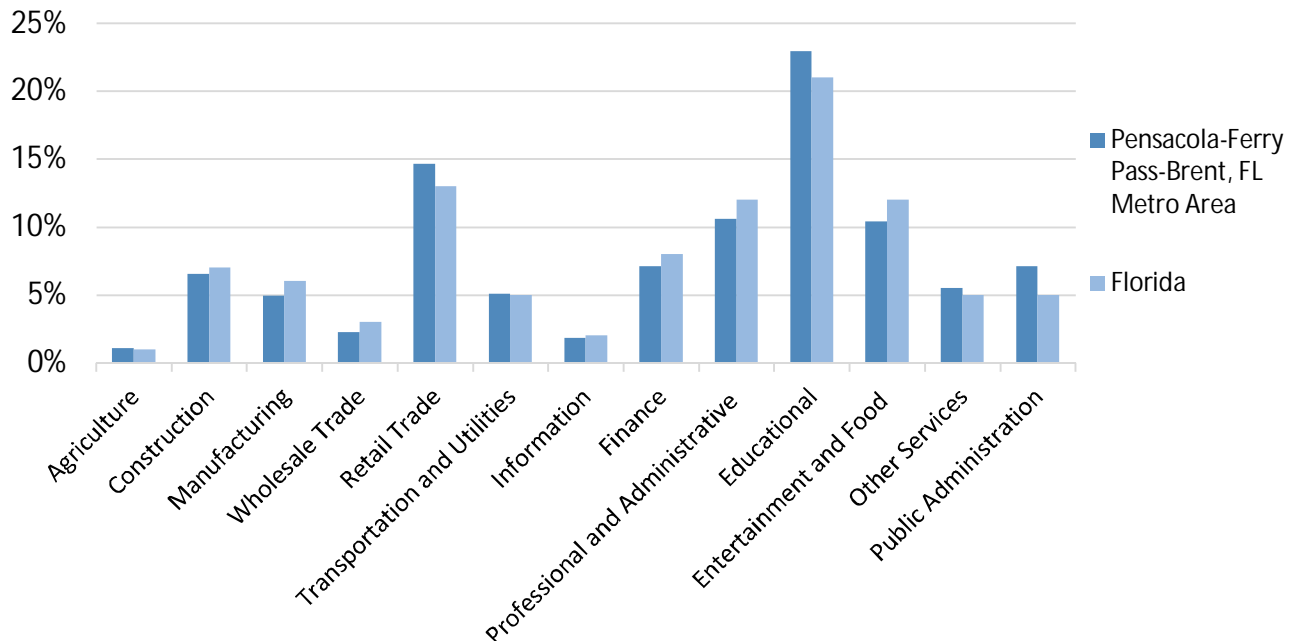
Figure 10. Employment by Industry[14]

Market Leakage

Figure 11 displays the zip codes in Florida where tickets for flights departing from PNS were purchased. This graphic shows the purchases of tickets primarily in the area surrounding PNS. However, tickets have been purchased for PNS flights from all over the state of Florida. Some areas with noticeable aggregations of ticket purchases include Jacksonville and Daytona. The majority of tickets purchased for PNS flights were purchased from out of state locations. In fact, only 46 percent of ticket purchases were from in-state locations. The other 54 percent of ticket purchases were from other states including:

- Alabama – 16%
- California – 4%
- Texas – 3%

The market leakage analysis shows that Pensacola International Airport does not lose a

Figure 11. In-state Ticket Purchases[15]

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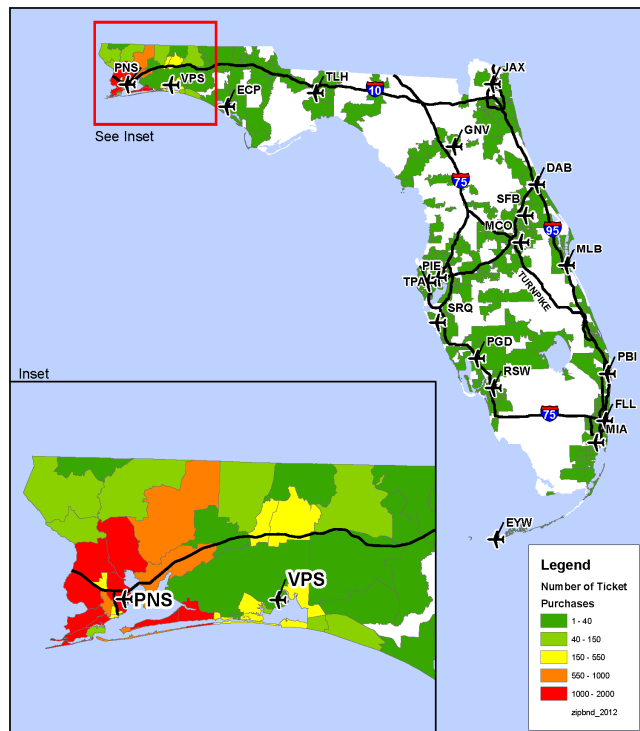
[14] U.S. Census American Fact Finder
[15] Airline Reporting Corporation (ARC)

substantial number of passengers to any other commercial service airport. The highest percentage of passengers from Escambia County that depart from a commercial airport other than Pensacola International depart from Destin-Ft. Walton Beach Airport. 0.7 percent of passengers departing Destin-Ft. Walton Beach Airport are from Escambia County. No other commercial airports were found to take a substantial

Figure 12. In-state Ticket Purchases[16]
(Represented as a Percentage of the Departing Airports Total Enplanement Volumes in 2015)
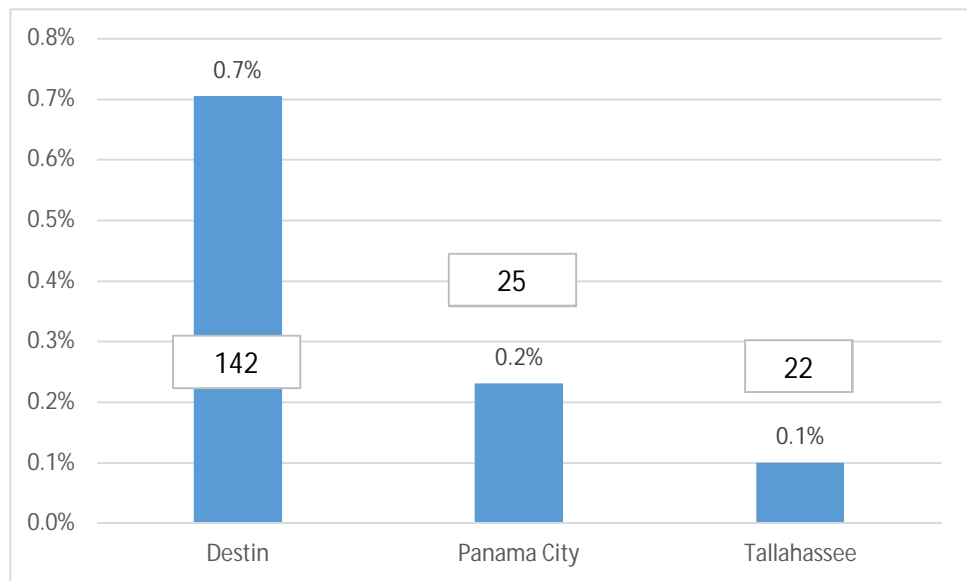
number of passengers from the Pensacola International Airport market. **Figure 12** illustrates three of the top airports that receive leaked passengers from the Pensacola International Airport market area. The values that are presented represent the number and percent of passengers who purchased their ticket from an Escambia County zip code but flew out of an alternative airport. The analysis also showed that of passengers departing from Pensacola International Airport, 3.9 percent were from Okaloosa County, the primary market for Destin-Ft. Walton Beach Airport. Data represent a 10 percent sample of all months of 2015.

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[16] Airline Reporting Corporation (ARC)