

GAINESVILLE REGIONAL AIRPORT



Gainesville-Alachua County Regional Airport Authority

Strategic Planning Session

May 29, 2019





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Strategic Plan Summary

Vision Statement: “to be the preferred airport for the residents, businesses and institutions of North Central Florida... to provide them maximum economic benefit and value, while operating in a fiscally and socially responsible way... to become a model gateway to our community”

Mission Statement: “to facilitate safe and efficient air commerce necessary to build prosperous communities... to promote, develop and maintain quality, affordable, airport facilities and services for the benefit of North Central Floridians”

Strategic Goals:

1. Safety and Airfield Operations

1.1. Focus on physical improvements, maintenance practices and operational policies and programs which serve to further enhance safety.

Action Items: The following capital improvement projects should be prioritized over the planning horizon:

- Phased update of airfield taxiway geometry to latest FAA design standards (AC150-5300-13).
- Work toward creation of a Master Drainage Plan with the goal of consolidating storm water facilities for more efficient handling, storage and treatment. Reducing the amount of open ditch and the size and number of treatment ponds is a major objective. These are sources of standing water and act as a wildlife attractant. They are also maintenance intensive.
- Pipe in existing airfield drainage ditches where practical. Continue to clear vegetation and regrade areas within the AOA that hold water and provide a food source or cover for wildlife.
- Continue to invest in new mowing and airfield maintenance equipment to remove vegetation and dredge drainage ditches and swales for more efficient water flow. This serves to eliminate potential obstructions and wildlife attractants. GNV should also plan to expand/improve its equipment storage and maintenance facility to better preserve equipment and to improve the working conditions for mechanics.
- Continue to invest in bird deterrent devices. Continue to modify signs, equipment and structures to inhibit nesting of birds. Explore other measures to discourage wildlife as outlined in the airport’s Wildlife Hazard Management Plan.
- Lobby FAA to replace aging air traffic control tower with a higher tower in the same general location (see ALP).
- Remove on-airport trees and vegetation to improve tower line of sight, where possible.
- Replace older, Index B ARFF vehicle for continued, operational redundancy.

- Continue to rehabilitate and upgrade airfield lighting and pavements, NAVAIDS, security and CCTV infrastructure to take best advantage of new technologies. Maximize use of FAA and FDOT funding, when possible.
- Continue to work with the City of Gainesville on approval of a land/tree management plan for airport and surrounding lands. The primary goal would be to remove trees before they become FAA Part 77 Obstructions. Part 77 obstructions work to diminish airfield approach and departure minimums, potentially degrading efficiency of public investments in runways and approach aids. A timber management plan would allow the airport and the city to realize some timber value, which is currently wasted in the field.
- Continue to work with the City of Gainesville and Alachua County to refine airport zoning regulations when necessary to ensure airport compatible land uses. Compatible land use policies reduce the potential for noise complaints, which may act to hinder further airport development, and to reduce the potential for airspace obstructions and other off-airport safety hazards.
- Consider purchasing buffer property as zoning may be insufficient.
- Refine codes as necessary to avoid new off-airport wildlife attractants in close proximity to the airport (i.e. waste dumps, wetlands and ponds, agricultural activities and other attractants).

2. Commercial Aviation

2.1. Promote benefits of GNV and existing air services to increase utilization, minimize leakage, and prevent possible loss of service.

Action Items

- Continue to study the GNV market to identify what potential customers value most and determine demographically and geographically where limited marketing and advertising resources are best spent to achieve the greatest increase in passengers.
- Use airport budget resources to develop positive, regional marketing campaigns. Approach media companies, local agencies and businesses regarding partnerships and advertising match to leverage resources.
- Make periodic sales visits and presentations to major employers, travel agencies, service organizations, etc. Involve stakeholders and advocates (frequent business flyers, business leaders, Chamber personnel, GACRAA Board Members, elected officials etc.) when beneficial.
- Work with airline marketing representatives on joint marketing and advertising programs where possible.
- Continue outreach to GNV frequent flyers with marketing and rewards programs designed to encourage GNV loyalty. Trade advertising benefits for gifts/rewards from local businesses, when possible.
- Monitor fares to top destinations, document disparities and approach the airlines as needed to maintain competitiveness with nearby airports.
- Monitor airline staffing and service issues and communicate complaints and documented deficiencies to local airline management and corporate customer service as appropriate.
- Expand opportunities for customer feedback to GNV staff and endeavor to explore and respond to every complaint, including those received via social media, when advisable.

2.2. Aggressively recruit additional air service, in partnership with community stakeholders.

Action Items

- Periodically update True Market and Passenger Leakage Studies. Collect other data needed by the airlines to justify investment in new service. Take advantage of new data collection sources and methods to capture travel within the catchment area not picked up by traditional sources like DOT records, MIDT and ARC reservations records.
- Continue to update and refine the airport's Air Service Strategic Plan developed in 2016. Invite key stakeholders to assist in plan development.
- Communicate with airline planning managers as often as possible to discuss new routes or desired improvements/enhancements to airline schedules and equipment. Make airline HQ visits and attend air service development conferences, or other venues where airline analysts and decision makers are accessible. Involve key stakeholders when appropriate.
- Review and update GACRAA's airline incentive package as needed to remain attractive and comply with changes to FAA Policies and Grant Assurances. Work with the community stakeholders to create ticket trusts or travel banks when requested by potential carriers.
- Continue plans to install mid-level boarding bridges and increased terminal gate space to facilitate changeover to larger aircraft. Maintain enough surplus terminal capacity to take advantage of new air service opportunities.
- Continue plans to expand airline ticketing/operations space and expand outbound baggage facilities to better accommodate potential new entrants.
- Continue efforts to avoid borrowing, mitigate financial risk, and keep airline operating costs as low as possible at GNV.

2.3. Monitor fares and work with air carriers to make existing GNV service more competitive.

2.4. Continue to upgrade terminal facilities and services to meet demands of travelers and air carriers.

Action Items

- Explore adding amenities such as increased food and beverage options, enhanced Wi-Fi, additional charging stations, live music, terminal art program, pet ambassadors, as well as personal services like sky caps, valet parking, etc., when possible (Children's play area, lactation room, reflection room and more charging stations included in current terminal expansion as well as future F&B space).
- Invest in new technologies to streamline passenger processing and improve customer information exchange, where appropriate.
- Investigate construction of a parking garage, covered walkways and improved cell phone lot. Continue to explore and implement other options to improve the parking experience when economically feasible, i.e. covered parking or valet services.

2.5. Partner with local governments and regional planning organizations to preserve efficient road access from I-75 and regional highways to the airport.

3. General / Business Aviation

- 3.1. Foster a positive and supportive climate for General Aviation that encourages progress, expands services, improves quality and promotes healthy competition.**
- 3.2. Recruit compatible types of aviation businesses to locate at the airport.**
- 3.3. Plan for continued, sustainable, expansion of GA facilities**

Action Items

- GNV should continue to plan for eventual strengthening of portions of the general aviation apron for greater utility and to reduce the possibility of over stressing some pavements.
- GNV Should plan for eventual replacement of the building with a larger, more modern building in partnership with UAC or subsequent FBO.
- GNV should plan for eventual expansion of aviation fuel storage capacity, particularly Jet A storage in the current fuel farm location or on the commercial side for added efficiencies.

4. Non-Aeronautical Development

- 4.1. Support and enhance city efforts to market the remaining lots in the Airport Industrial Park, either for sale or lease.**
- 4.2. Identify and target potential businesses to achieve the highest and best use for airport properties. Engage commercial brokerage and economic development community to broaden awareness of the available property.**
- 4.3. Explore planning, zoning and infrastructure improvements to make existing airport properties more marketable.**
- 4.4. Work with community and economic development stakeholders to foster development of new industrial park and commercial sites on or adjacent to the airport, including the Alachua County Fairgrounds.**

Action Items

- GNV should explore additional, advance planning or infrastructure improvements, including sewer infrastructure, along the west access from Waldo Road, when resources permit.
- Given the limited land available with street visibility and the lower potential employment and gross wages generated per acre by self-storage or warehousing, GNV should consider soliciting for storage only in the outlying parcels in the north east quadrant of the airport.
- GNV should continue to monitor opportunities for solar power as solar technology, energy prices and regulations affecting demand for renewables may change.
- GNV must remain vigilant in protecting zoning around the airport to ensure compatible land uses, control obstructions and discourages residential development in noise sensitive areas.
- GNV should explore targeted land acquisitions which:
 - Protects airport operations
 - Provides for airport expansion
 - Diversifies airport revenues
 - Fosters general economic development



Strategic Plan

May, 2019

Purpose

The purpose of GACRAA's Strategic Plan is to establish a clear direction for Airport Management regarding the priorities, goals and future achievements of the Gainesville Regional Airport. The Strategic Plan seeks to take stock of where the airport is today and where the Airport Authority and stakeholders wish it to be up to twenty years from now.

Strategic Planning Process

GACRAA's overall strategic goals are summed up in the Airport's Vision statement. The Vision Statement reflects the "end state" that the airport hopes to achieve.

Vision Statement

*"to be the preferred airport for the residents, businesses and institutions of North Central Florida.....
to provide them maximum economic benefit and value, while operating in a fiscally and socially responsible way.....
to become a model gateway to our community"*

The Mission Statement is a concise statement of the airports purpose. As such, it identifies the airport's core values and reason for existence. Together, these statements are a continuous guidepost for all airport planning, training programs and daily decision making from top to bottom. They are also used to define the airport's culture.

Mission Statement

"to facilitate safe and efficient air commerce necessary to build prosperous communities.....to promote, develop and maintain quality, affordable, airport facilities and services for the benefit of North Central Floridians."

Specific assets and needs as well as prospective opportunities and potential obstacles to achieving strategic goals are identified in the attached SWOT Analysis (*strengths, weaknesses, opportunities and threats*).

The future actions derived from the SWOT Analysis are key to the airport achieving its vision. Attainment of individual strategic goals will be achieved through implementation of long and short-term action plans that make up the “Planning Funnel”. These include the Airport Master Plan, Capital Improvement Program (CIP) and Air Service Strategic Plan as well as business plans, budgets, and various other tactical planning tools. Highlights of the SWOT Analysis are contained in the plan narrative. A number of individual action items derived from the SWOT process are also shown as bulleted action items.

The number of goals and objectives in the Strategic Plan should be limited such that management can maintain its focus on key priorities and can attain them.

The success of the strategic planning effort should be monitored through the establishment of various performance measures established for each goal.

Also critical to attainment of airport goals are the policies and examples set by management. These programs and practices are necessary to develop a skilled, motivated, work force that is goal focused and to develop a positive airport culture. This culture will have safety and customer service at its core and strive for continuous, daily, quality improvement. Important to attainment of such a culture is for management to adequately communicate and exemplify the Airport’s Mission Statement.

An airport strategic plan may differ from other organizations strategic planning in some critical ways. Airport owners in the U.S are almost exclusively government organizations. Airport Authorities are created for the sole purpose of operating and developing a particular airport or a local system of airports. All other activities or attempts at diversification are expected to support this primary mission. Business diversification outside of the airport boundary is generally discouraged or contrary to law.

Overview

The Gainesville Regional Airport is a publicly owned, public use, commercial service airport. The airport is located in the north eastern portion of the City of Gainesville, in Alachua County. The City began construction of the airport as a municipal airfield in 1940 as a Works Project Administration project. The project was taken over by the US Army Corps of Engineers at the onset of WWII and was completed as the Alachua Army Airfield in 1941. The airport and ancillary lands acquired by the federal government were deemed surplus after the war and turned over to the City of Gainesville in 1948 for operation as a civil airport. The majority of this land is still federally obligated to be used for airport purposes or the city must meet the obligations for release.

A simple, 5,900 square-foot passenger terminal was constructed on the north east side of the airport and Eastern Airlines began scheduled passenger operations in the 1950s. The airport has been served by various commercial operators ever since. A new primary runway and commercial airline terminal were constructed in the late 1970s. Both have been expanded and improved and are still in use today.

Airport Governance

The airport was operated as a municipal airport by the city of Gainesville until 1986, upon which time governance was transferred by an act of the Florida Legislature to the Gainesville-Alachua County Regional Airport Authority. The land is owned by the City of Gainesville; however, the airport authority has legal standing to operate, develop and maintain the property. The majority of this land, approximately 1,650 acres, is still federally obligated to be used for airport purposes or meet the obligations for release.

Today, GACRAA is an independent special district of the state of Florida. The Authority Board consists of nine appointed members. Five of these are appointed by the Gainesville City Commission, three by the Governor of Florida and one by the Alachua County Commission. GACRAA has no taxing authority and operations are funded by airport derived revenues. GACRAA also relies extensively on state and federal grant programs for airport capital projects, and to a lesser extent on airline Passenger Facility Charge (PFC) Collections.

GNV Master Plan

The Airport Master Plan is an important part of the airport's "planning funnel". The overall goals of the Strategic Plan should guide the formation of the Master Plan. The Strategic Plan should be consistent with the FAA Master Plan and vice versa. A Master Plan is a comprehensive document. Many of the historical facts, data, forecasts and existing conditions presented in the Master Plan should be considered in the update of the Strategic Plan and supplemented as needed in order to avoid duplication. Other recent airport studies and planning documents also provide useful information in understanding the airports community, operating environment and future trends.

The Airport Master Plan is an FAA prescribed document. It is a 20-year vision for airport development, which is typically updated every 5-10 years, depending upon activity. GNV's Master Plan was last updated in 2015. The Master Plan helps to ensure that future construction will occur in a logical and efficient manner, consistent with community goals, environmental rules and FAA requirements. Funding agencies like FAA and FDOT work to ensure that proposed development is consistent with the official Master Plan. While not a blueprint for construction, the Master Plan provides a graphic representation of timely, physical development needed to meet forecasted demand for aeronautical activities. GNV's plan also included an examination of opportunities for non-aeronautical development in order to diversify revenue opportunities on and around the airport.

Master Plans must first and foremost reflect the strategic goals of the Airport Authority and the community at large. Official Master Plans must also contain certain FAA and FDOT prescribed elements in order to be accepted for funding. One such requirement is the opportunity for stakeholder involvement. GNV's base plan included numerous opportunities for public comment, including advertised public meetings, as well as formal participation by local, technical advisory and stakeholder committees.

The Master Plan begins with an inventory of existing airport facilities and conditions, which can provide valuable information when updating the Strategic Plan. This inventory includes:

- Runways; taxiways; aprons and other airport pavements
- Navigation Aids and airfield lighting
- Existing airport uses, including number and types of based and itinerant aircraft, IFR and VFR operations, number of commercial passengers.
- Demand for general aviation services
- Local and itinerant airspace, obstructions and air traffic control services

- Terminal buildings, hangars and support structures
- Fueling facilities and miscellaneous aircraft servicing and maintenance equipment.
- Available land for development, available utilities, zoning, major roadways.
- Environmental factors, noise issues and other factors affecting development.
- Prevailing winds and weather and other operational conditions.

Once the inventory is completed, airport master planners and the local Technical Advisory Committee (TAC) begin forecasting future demand by examining area demographics and using various forecasting tools. A fundamental consideration is the FAA's own Terminal Area Forecast (TAF). The TAF is the FAA's opinion of GNV's passenger growth, as well as the growth of airline and general aviation aircraft operations and based aircraft. The airports own growth projections are generally expected to be within 10% of the TAF.

A required element of the Master Plan is the FAA approved Airport Layout Plan (ALP). The ALP graphically depicts existing and proposed improvements, both airside and groundside. This includes all buildings as well as horizontal infrastructure like runways, taxiways, and aprons. The ALP also depicts critical airspace (FAR Part 77 Surfaces) and safety areas which must be kept clear of obstructions, both now and in the future. FAA requires that the ALP be kept current and that all prospective development be consistent with the approved ALP. GNV's ALP is typically updated after all major construction projects and is currently being updated to reflect most recent construction and to incorporate FAA desired taxiway geometry changes in advance of planned pavement rehabilitation work.

Other components of the Master Plan include a 20-year Capital Improvement Plan, a basic financing plan, as well as an identification of non-aeronautical land available for development, both on and off-airport. The 2015 MP update included identification of various parcels that could be developed for non-aeronautical use and the most likely potential uses.

Other Key GNV Planning Documents

Following the Master Plan, GNV undertook a more detailed study of terminal building needs during the planning period. The 2013 **Terminal Concept Study** and a subsequent 2015 whitepaper, refined the forecast for commercial passengers under various scenarios, examined trends in airline fleet changes and made a more detailed investigation of required terminal improvements.

The airport has also completed an **Air Service Strategic Plan** (2016) and a **True Market/Leakage Analysis** (2013). These documents further define the airports service or "catchment" area and GNV's market share to individual cities (*domestic and foreign*). The airport's catchment area is a geographic area wherein at least one person has purchased an airline ticket to fly from GNV in the past year. This area currently includes all of Alachua and parts of 10 additional counties, Marion, Columbia, Suwannee, Levy, Bradford, Putnam, Gilchrist, Dixie, Union and Clay. The size of the catchment area can be further refined to reflect reasonable drive times to the Gainesville Regional Airport. The population within the catchment area, as currently defined, is approximately 789,672 persons. A new market study is being undertaken in early 2019. New digital data sources are expected to more completely capture airline ticket sales in the region and help identify passenger travel preferences. Data will include fare comparisons with competing airports, class of tickets purchased, departure airport chosen, drive time and other data points. This should help GACRAA better understand the reasons for leakage from individual zip codes.

The above documents are designed to assist the airport and the community in determining which airline routes have the best opportunity for success and where resources should be focused to attract new service. This data is then used to prepare individual presentations to airlines to pitch new service.

SWOT Analysis (*Strengths, Weaknesses Opportunities and Threats*)

The attached SWOT Analysis is an assessment of the airport and its operating environment. An accounting of the airport's strengths, weaknesses, opportunities and threats can assist GACRAA in setting strategic goals. Attainment of these goals is seen as necessary for the airport to achieve its ultimate vision as described in the Vision Statement. Individual action items are suggested to capitalize on GNV strengths and opportunities and to mitigate weaknesses and threats. These have been added to the SWOT Analysis for development of a more detailed Action Plan.

Key factors considered in the SWOT Analysis include:

- The Airport's current location (pros and cons)
- Environmental and land use constraints
- The health of surrounding communities and area demographics
- The changing competitive environment
- Political setting and community values
- Regulatory climate and anticipated legislation
- Current airport capabilities (i.e. runways, facilities, human and financial resources)
- Key airport tenants and service providers (*are they in growth or decline?*)
- Relevant plans of key funding agencies (FAA, FDOT, etc.)
Federal NIPIAS, FAA's TAF, FDOT State Aviation System Plan

Strategic Goals

The strategic goals derived from the results of the SWOT Analysis are the cornerstone of the Strategic Plan. These goals have been categorized as follows:

- 1) Safety and Airfield Operations
- 2) Commercial Passenger Service
- 3) General/Business Aviation
- 4) Non-Aeronautical Development

Safety and Airfield Operations

Maintaining operational safety and significantly reducing risk to life and property is paramount to all other airport activities. Airport customers and stakeholders must have absolute confidence in airport safety in order for the airport to remain commercially viable. Airport licensure and funding eligibility require that GNV be operated in accordance with all federal safety and security requirements (*TSA Part 1542, FAR Part 139 and FAA grant assurances*).

GOAL: Focus on physical improvements, maintenance practices and operational policies and programs which serve to further enhance safety.

Action Items

GNV has been recognized for its record and commitment to safety. The airport has numerous training programs, inspection protocols and reporting and recording procedures in place to detect safety concerns and ensure timely resolution. Airport management will continue to refine these processes and employ newer technology where it can be of benefit. The following capital improvement projects should be prioritized over the planning horizon:

- Phased update of airfield taxiway geometry to latest FAA design standards (AC150-5300-13).
- Work toward creation of a Master Drainage Plan with the goal of consolidating storm water facilities for more efficient handling, storage and treatment. Reducing the amount of open ditch and the size and number of treatment ponds is a major objective. These are sources of standing water and act as a wildlife attractant. They are also maintenance intensive.
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- Lobby FAA to replace aging air traffic control tower with a higher tower in the same general location (see ALP).
- Remove on-airport trees and vegetation to improve tower line of sight, where possible.
- Replace older, Index B ARFF vehicle for continued, operational redundancy.
- Continue to rehabilitate and upgrade airfield lighting and pavements, NAVAIDS, security and CCTV infrastructure to take best advantage of new technologies. Maximize use of FAA and FDOT funding, when possible.

The following policies and procedures should be instituted or further refined:

- Continue to work with the City of Gainesville on approval of a land/tree management plan for airport and surrounding lands. The primary goal would be to remove trees before they become FAA Part 77 Obstructions. Part 77 obstructions work to diminish airfield approach and departure minimums, potentially degrading efficiency of public investments in runways and approach aids. A timber management plan would allow the airport and the city to realize some timber value, which is currently wasted in the field.
- Consider purchasing buffer property as zoning may be insufficient.
- Continue to work with the City of Gainesville and Alachua County to refine airport zoning regulations when necessary to ensure airport compatible land uses. Compatible land use policies reduce the potential for noise complaints, which may act to hinder further airport development, and to reduce the potential for airspace obstructions and other off-airport safety hazards.
- Refine codes as necessary to avoid new off-airport wildlife attractants in close proximity to the airport (i.e. waste dumps, wetlands and ponds, agricultural activities and other attractants).

Management should continue to develop its positive, safety culture. The following programs should be continued and expanded upon:

- Facilitate tenant and user-initiated safety alerts and maintenance requests via airport web-site, airport work order software, telephone and any other means.
- Continue to refine and improve maintenance and construction safety bulletins to affected tenants and stakeholders via web-site, e-mail and any other means.
- Continue formal safety committee meetings and employee safety/training meetings.
- Increase efforts to improve safety awareness. Implement a safety awards program for personnel exhibiting best practices.
- Continue anonymous safety “whistleblower” and employee suggestion box programs.
- Continue refinement of computerized ARFF training programs.
- Explore tenant information and safety newsletter.
- Modify Foreign Object Debris (FOD) Program to encourage greater stakeholder participation.
- Update digital airfield/facilities inspection and work order management software as necessary to take advantage of new software capabilities.
- Institute FAA prescribed Safety Management System (SMS) as scheduled.

Commercial Aviation

Providing for scheduled airline service is central to the airport’s mission. GNV provides a vital link to the nation’s air transportation system. Affordable, convenient, air service is essential to job creation and job retention in the community.

GOALS

1. Promote benefits of GNV and existing air services to increase utilization, minimize leakage, and prevent possible loss of service.

2. Aggressively recruit additional air service, in partnership with community stakeholders.
3. Monitor fares and work with air carriers to make existing GNV service more competitive.
4. Continue to upgrade terminal facilities and services to meet demands of travelers and air carriers.
5. Partner with local governments and regional planning organizations to preserve efficient road access from I-75 and regional highways to the airport.

Financial Impacts

Rents and fees charged to airlines as well as airline passenger parking and rental car concessions are, by far, the largest contributors to airport operation and maintenance costs. Airport operations are financially self-sufficient. The Airport Authority has no taxing authority and receives no operating funds from other units of government.

Scheduled passengers also provide the largest source of funding for airport capital improvements through Passenger Facility Charge collections (PFCs) and user fees disbursed by FAA *through* the Federal Airport Improvement Program (*see attached budget pie chart figure X.*) GNV receives AIP entitlement grants based on the number of enplaned, commercial passengers. The current FAA entitlement is approximately \$1.8 million annually. The airport also competes for discretionary funds funded through the AIP Program. PFC funded projects must be approved by the FAA after required opportunity for public comment and consultation with the airlines. The project eligibility requirements for PFC approval are the same as for AIP Grant approval. The Florida FDOT is also a major funder of airport improvement projects. In fact, the FDOT program is generally larger than the federal program allocation for Florida. FDOT participation is limited to 50% for eligible projects at commercial airports, by statute. FDOT funds come primarily from gasoline taxes paid by motorists. A small amount, generally less than 10%, comes from a special aviation fuel tax. State project eligibility requirements are generally less restrictive than the federal requirements and allow GNV to fund certain projects that are revenue generating, like hangars and fuel storage facilities.

GNV competes for passengers with three large, metropolitan airports; Jacksonville (JAX), Orlando (MCO) and Tampa (TPA) as well as other airports on the periphery of the airport's catchment area. Some of these, like Sanford (SFB), provide leisure-oriented service from ultra-low-cost carriers (ULCCs).

Smaller, regional airports are particularly sensitive to changes in airline fares and schedules. A decision by a single airline at GNV to discontinue or curtail services can have severe financial consequences

History

Like many airports serving small to medium sized communities, GNV traffic experienced significant upheaval in the years following federal deregulation. Carriers were free to explore new markets and engage in vigorous competition. Many new air service providers came on the scene at GNV in the 1980s.

Several of these flew turboprop aircraft for larger, legacy carriers. At its previous peak in 1990, GNV enplaned 216,724 passengers and was briefly served by seven different carriers. These included, mainline USAir, two USAir Express carriers, mainline Delta, one Delta Connection carrier as well as Eastern Airlines. Eastern Airlines had been the predominant carrier at GNV for many years but ceased operations in 1991. Eastern had consistently enplaned more than 10,000 passengers per month. Delta Airlines began mainline jet operations in 1990 at the same time Eastern was experiencing financial difficulties. In 1998, Delta completely transferred its mainline operations to its regional subsidiary, providing turboprop service to Atlanta. US Airways operated mainline jets at GNV for about 6 years, beginning in 1989. USAir turned all of its operation over to its regional contract carriers, providing turboprop service to Charlotte in 1994. The change to turboprops and higher fares at GNV led to a steady decline in ridership, even as North Central Florida continued to experience slow but steady growth. The emergence of Southwest Airlines and other lower cost carriers operating from JAX and MCO served to bring down competing fares at these locations. Passenger enplanements hit rock bottom in 2002, declining to less than 90,000 annually, with only Delta Connection service to Atlanta remaining. The following years saw USAir re-enter the market with turboprop service to Charlotte. Other carriers came and went, including Northwest Airlines regional jet service to Memphis and Gulfstream Airlines (*operating as Continental Express*) Service to Tampa and Miami. Both carriers went bankrupt within a couple of years, as the airline industry continued its pattern of bankruptcy and consolidation.

Air service at GNV began a turnaround after the recession of 2007. Passenger enplanements rose from about 148,781 in 2007 to approximately 239,700 in 2018. Both US Airways and Delta converted to all jet operations and began to offer more competitive fares. GNV undertook a major renovation of its terminal building, improving the passenger experience and bringing back private food and beverage service that had been lacking since 2002. American Airlines entered the GNV market for the first time in October, 2010, introducing American Eagle service to its Miami hub. Silver Airways operated turboprop service at GNV from 2012-2015 with initial turboprop service to FLL, TPA and MCO. American merged with US Airways in 2013 and continued to offer RJ service to both Charlotte and Miami. In September of 2018, American announced the addition of daily service to its DFW hub, beginning March 3, 2019.

Air Service Challenges and Opportunities

GNV has experienced a vigorous rebound since the recession of 2008. Passenger facilities have been greatly improved in recent years and the airport enjoys a good public image. The air service environment remains challenging, however.

Commercial enplanements now exceed historical (*pre-deregulation*) highs. Passenger boardings have risen approximately 79% since the end of 2009. This has occurred despite a reduction in the number of carriers providing service from as many as four, down to two today.

After the previous recession, the airlines shed underperforming routes and older, less fuel-efficient aircraft. The airlines had a good deal of excess capacity that was not replaced. Continued consolidation in the airline industry resulted in fewer opportunities for new regional service. As stated, only three, traditional “hub and spoke” carriers remain. These legacy airlines are enjoying long-overdue profits.

New airline fleet purchases do not include aircraft of 50 seats or less, which traditionally served smaller markets like Gainesville with the maximum, practical frequency. Trip convenience is one of the most

important advantages of a regional airport, where fares tend to be significantly higher than nearby hub airports. Reduced flight frequency in favor of fewer flights by larger aircraft results in a loss of convenience and is a concern at GNV. The Gainesville community must be able to adequately support larger aircraft at reasonable frequencies.

The legacy airlines have been phasing 50 seat RJs out of their fleets over the last ten years or so, due to higher maintenance costs, fuel and crew costs per seat. Those that have not been parked in the desert or sold for other uses are now aging out. Delta and American have been replacing some of their 50 seat RJ's with larger 67 and 76 models on select GNV flights. Delta has also introduced mainline, narrow body aircraft at GNV, including the B717 (110 seats), as well as the MD88 (149 seats) and A320 (156 seats) during busier months.

The tightening labor market appears to be affecting regional air carriers, which are contract carriers to the major airlines. These firms have traditionally offered low wages. Delta Global Services has recently experienced high turnover and worker shortages, which has resulted in some local flight delays. DGS is being sold to a private entity. It has been stated that employee travel benefits will be curtailed or eliminated. This is an important perk for many employees and may further affect retention.

Regional Air Service Market

GNV's existing passengers generally favor proximity and convenience over fare price. Business travelers represent the highest number of frequent flyers. The average traveling party is estimated at 1.2 persons. These customers typically put a high value on airline loyalty/reward programs.

North Central Florida has traditionally grown slower than the state average. Alachua and Marion Counties make up the largest part of the region's population, by far. Approximately 83% of originating GNV passengers are from Alachua County.

Alachua County population is approximately 266,944. Population growth through 2040 is expected to be somewhat less than in previous decades, averaging 1.1% per year. The segment with the largest increase is expected to be among those over age 65.* This compares with estimated growth rates of 2.4% for the Orlando region and 1.7% for Jacksonville.

Marion County is expected to surpass the state's average growth rate over the planning period, ahead of Alachua County. Marion County's current population is estimated at 354,353 with an anticipated growth rate of approximately 1.8%. Several large product distribution centers have recently been located in Marion County, along the I-75 corridor and others are planned. Some large housing developments, including some catering to retirees, are under construction. The planned World Equestrian Center is anticipated to add a number of visitors to the area.

Alachua County has shown itself to be less sensitive to recessions due to higher than average government, professional and healthcare related employment and a lesser reliance on construction, manufacturing and warehousing. New biotech and software/technology spinoffs as well as major medical facilities affiliated with the University of Florida occurred despite a soft national economy. Housing recovery has been sporadic, however. Plans for a few large, commercial retail developments moved ahead in Alachua

County and are nearing completion. The University of Florida is a large generator of traffic at GNV. The airport is uniquely positioned to serve the university, being about 5 miles away.

There are over 1.4 million people within 90 minutes' drive time of GNV. Most of these residents are also within the same 90 minutes' drive time to one or more metropolitan hub airports (JAX, MCO and TPA). In 2014, GNV's Catchment Area has been delineated as all or part of 13 counties surrounding the airport. There are approximately 800,000 persons living within GNV's Catchment Area. Alachua had the highest concentration of GNV passengers, generating 85.5% of tickets purchased from GNV, and more rural Lafayette County the smallest, at .1%. The second highest contributor to GNV sales is Marion County. While most of northern Marion County is within 60 minutes' drive time of GNV and represents 27.8% of the Catchment Area population, Marion County only generated 5.7% of GNV sales.**

In 2014, GNV's share of its total catchment area was 25.1%, with the largest share choosing MCO (37.4%), and JAX (18.4%) and TPA (18.5%) splitting the remainder. All three metro airports offer various flight options by low cost carriers (LCCs). The exceptionally high demand for leisure travel to these airports, particularly MCO and TPA, drives a highly competitive market with aircraft seat capacity and air service options beyond the typical city norm. Ultra-Low Cost (ULCC) leisure service into central Florida is also available from SFB and is a draw, particularly for southern Marion County.

These competing airports can offer significant fare savings vs. GNV. In 2018 (year end June 30), travelers from GNV paid an average one-way fare premium of \$92 over MCO, \$88 over TPA and \$45 over JAX*. The average premium over ULCC service available from Orlando-Sanford (SFB) was \$184 each way. SFB is principally served by Allegiant Airlines. Allegiant carries passengers from approximately twenty-five, mid-sized northern and mid-western cities primarily to leisure destinations in central Florida. Service to any one city may be daily or less than daily.

Despite lower fares and many direct flight options, leakage to major hubs is limited to 50-55% from most areas within a 30-minute drive time to GNV. Use of GNV falls off sharply as drive times decrease to competing hubs. Traffic retention appears to be much better to the west, where direct highway access to MCO is more difficult. GNV retention along the Nature Coast varies from 22% to 41% (*Dixie, Levy and Taylor Counties, 2014 data*). Leakage is much more pronounced in central and southern Marion County along the I-75 and Florida Turnpike corridors. Leakage here is as high as 96-100% and the fairly short drive to MCO can be very attractive, given the potential savings and schedule options. Please remember that savings multiply considerably the more people are in the travel party.

The approximate drive times from Marion population centers to GNV vs. competing hubs are as follows:

From central Ocala:	48 minutes to GNV 80 minutes to MCO 97 minutes to TPA
From Silver Springs Shores:	68 minutes to GNV 85 minutes to MCO 102 minutes to TPA
From central Belleview:	63 minutes to GNV 76 minutes to MCO 94 minutes to TPA

- GNV must continue to find ways to improve the passenger experience, particularly with respect to comfort and convenience.
- Continuously educate local travelers and businesses on the benefits of “flying local”, reminding them how increased load factors on existing service can encourage carriers to invest in new or better service.
- GNV should continue to communicate good economic news and local development plans to incumbent air carriers whenever possible.
- GNV should could continue to cultivate a positive image with stakeholders and the media.

Outlook Summary

Today, Gainesville enjoys good, reasonably priced, air service for a community its size. Air service improvements and passenger growth must continue to be a primary goal, however. GNV is classified as a non-hub airport. It is served by two of the three remaining, legacy network carriers with jet service to three major hubs (*soon to be four*). The airline industry has been enjoying strong profits and further consolidation of the remaining three, network carriers is considered unlikely at this time.

In 2015, scheduled, passenger enplanements totaled 216,973, surpassing the previous all-time high of 216,724 set in 1990. This previous peak occurred before the competitive effects of deregulation took hold, resulting in higher competition and the emergence of various low-cost carriers at competing hub airports. Calendar year 2018 enplanements totaled 239,198, another new record.

The opportunity to retain and improve air service from GNV over the planning period is considered good, although recession, fuel price volatility and airline pricing price increases and service reductions are always potential threats. These factors are outside the control of GNV management.

North Central Florida continues to grow and diversify its economy. There are still challenges to increasing median income overall and to add employment in closer proximity to the airport, particularly east of the airport, where there is little development.

Gainesville and surrounding communities differ from most Florida communities with commercial air service. North central Florida is a more rural, inland region and is not a significant national or international tourist draw. This severely limits GNV’s ability to attract discount, leisure carriers offering daily or less than daily service. LCC and ULCC service helps to stimulate new travel demand, create additional commercial development and augments flights available to business travelers.

GNV must continue to aggressively market itself and seek new air service opportunities. It is unlikely that GNV will be able to compete with high volume, leisure markets on price. However, GNV should work toward providing a high level of convenience, and a superior customer experience to attract discriminating travelers.

GNV desires to provide high quality terminal facilities to elevate passenger comfort and convenience. The terminal must also retain enough excess capacity to facilitate additional, scheduled air service, as opportunities arise. This includes passenger lounges and amenities as well as airline operations, aircraft boarding gates and automobile parking.

GNV now enjoys all jet service, which is highly favored by customers. The Gainesville market is slowly making a needed transition away from 50-seat aircraft, which are being retired, to larger regional jets and mainline aircraft. GNV's planned terminal improvements will more comfortably accommodate larger aircraft.

GNV's "catchment area" includes Alachua and portions of up to 13 surrounding counties. In order for GNV to compete with nearby hubs based on convenience, GNV must remain easily accessible from outlying communities. Efforts should be made to reduce local traffic congestion around the airport and on critical arterial roadways, including I-75, and state roads 24, 222, 441 and 301.

GOAL 1: Promote existing air services to increase utilization, minimize leakage, and prevent possible loss of service.

Action Items

- Continue to study the GNV market to identify what potential customers value most and determine demographically and geographically where limited marketing and advertising resources are best spent to achieve the greatest increase in passengers.
- Use airport budget resources to develop positive, regional marketing campaigns. Approach media companies, local agencies and businesses regarding partnerships and advertising match to leverage resources.
- Make periodic sales visits and presentations to major employers, travel agencies, service organizations, etc. Involve stakeholders and *advocates (frequent business flyers, business leaders, Chamber personnel, GACRAA Board Members, elected officials etc.)* when beneficial.
- Work with airline marketing representatives on joint marketing and advertising programs where possible.
- Continue outreach to GNV frequent flyers with marketing and rewards programs designed to encourage GNV loyalty. Trade advertising benefits for gifts/rewards from local businesses, when possible.
- Monitor fares to top destinations, document disparities and approach the airlines as needed to maintain competitiveness with nearby airports.
- Monitor airline staffing and service issues and communicate complaints and documented deficiencies to local airline management and corporate customer service as appropriate.
- Expand opportunities for customer feedback to GNV staff and endeavor to explore and respond to every complaint, including those received via social media, when advisable.
- Continue to upgrade the terminal and improve passenger experience.

- Explore adding amenities such as increased food and beverage options, enhanced Wi-Fi, additional charging stations, live music, terminal art program, pet ambassadors, as well as personal services like sky caps, valet parking, etc., when possible (*Children's play area, lactation room, reflection room and more charging stations included in current terminal expansion as well as future F&B space*).
- Invest in new technologies to streamline passenger processing and improve customer information exchange, where appropriate.
- Investigate construction of a parking garage, covered walkways and improved cell phone lot. Continue to explore and implement other options to improve the parking experience when economically feasible, i.e. covered parking or valet services.

Air Service Recruitment/Enhancement

GOAL 2: Recruit additional air service aggressively, in partnership with community stakeholders.

Action Items

- Periodically update True Market and Passenger Leakage Studies. Collect other data needed by the airlines to justify investment in new service. Take advantage of new data collection sources and methods to capture travel within the catchment area not picked up by traditional sources like DOT records, MIDT and ARC reservations records.
- Continue to update and refine the airport's Air Service Strategic Plan developed in 2016. Invite key stakeholders to assist in plan development.
- Communicate with airline planning managers as often as possible to discuss new routes or desired improvements/enhancements to airline schedules and equipment. Make airline HQ visits and attend air service development conferences, or other venues where airline analysts and decision makers are accessible. Involve key stakeholders when appropriate.
- Review and update GACRAA's airline incentive package as needed to remain attractive and comply with changes to FAA Policies and Grant Assurances. Work with the community stakeholders to create ticket trusts or travel banks when requested by potential carriers.
- Continue plans to install mid-level boarding bridges and increased terminal gate space to facilitate changeover to larger aircraft. Maintain enough surplus terminal capacity to take advantage of new air service opportunities.
- Continue plans to expand airline ticketing/operations space and expand outbound baggage facilities to better accommodate potential new entrants.

- Continue efforts to avoid borrowing, mitigate financial risk, and keep airline operating costs as low as possible at GNV.

General Aviation

GOAL 1: Foster a positive and supportive climate for General Aviation that encourages progress, expands services, improves quality and promotes healthy competition.

GOAL 2: Recruit compatible types of aviation businesses to locate at the airport.

GOAL 3: Plan for continued, sustainable, expansion of GA facilities

General Aviation provides a variety of high value services to the public as well as the local business community. Important community services provided at GNV include passenger charter, air ambulance, blood and organ transport, law enforcement, forestry and fire patrol. GA creates a significant number of local jobs and is responsible for about 14.1% of airport revenues. These revenues help to maintain the airport in accordance with strict safety standards for the benefit of all users.

General Aviation activity can be a valuable barometer on the state of private industry in a community. Business aircraft efficiently transport valued customers, principals and high-level executive to customers, business interests and areas of new opportunity. GNV is home to approximately 144 based aircraft. About 23 of these are jets operated by private businesses or available for private charter. The majority of local aircraft are single-engine piston types. These are most often used for training, recreation and by small business owners to expand their reach.

National and Local Trends

General Aviation has been declining across the U.S. since the late 1970s. GA activity peaked nationally in 1979 at around 40,000,000 flight hours per year. High fuel costs, economic recession and manufacturer's liability concerns led to a precipitous decline until 1983. The industry began to recover over the next two decades, with major economic and world events such as the first Persian Gulf War, taking their toll on gains. In 1999, GA activity peaked once more at the previous 1979-80 high and has been declining ever since. The number of U.S. GA flight hours today is about what it was in 1973, despite a 50% increase in the general population. A number of factors have been attributed to this decline, among these are higher fuel prices and higher aircraft acquisition and operating costs; globalization and a shift toward service industries in the U.S.; Flat or decreased adjusted real income for most of the population overall since 1989; an aging and declining pilot population. The number of active pilots across all certificate levels has declined from its peak of 827,071 in 1980 to 633,317 in 2018.

Flying has been an increasingly expensive activity that requires purchasing, housing, insuring and maintaining an aircraft to safe standards. Pilots must also undergo costly initial training, recurrent training and maintain strict medical standards. The largest drop in GA activity has been among operators of smaller, piston aircraft. FAA and the industry worked together to create the Recreational Pilot Certificate in the 1990s with the aim of making certification less cumbersome and more attractive for day-time operators of light aircraft within close proximity to their home base. The total number of Recreational Pilot certificates held in 2017 was just 153 and has declined steadily over the past ten years. Similarly, the Sport Pilot certificate was approved in 2005 to allow operators of very light, two-seat aircraft to fly with a self-certified medical certificate and reduced training requirements. Flight at night is not authorized with the Sport Pilot certificate. This new pilot class may be serving to keep some leisure pilots flying longer and to interest a relatively small number of people to join the hobby. The number of Sport Pilot certificates has increased from 939 in 2006 to 6,246 in 2018. The number of conventional Private Pilot certificates held decreased by 62,528 (to 163,695) over the same period. About 13,774 Private Pilots reside in Florida.

The vast majority of factory-built piston-powered airplanes operate on leaded aviation fuel (100LL). Pressure on the industry by interest groups and the EPA to eliminate this fuel continues. Research on a replacement continues, but as of now, there is no available substitute for 100LL in higher performance aircraft engines. The number of refiners willing to produce 100LL has dwindled due to low volume potential and liability. At the present time, there is also only one remaining producer of tetraethyl lead in the world. The continued availability of leaded aviation gasoline (100LL) is of concern to some potential new aircraft owners. While new diesel models are emerging that are able to run on Jet-A kerosene, large scale adoption of the technology has not occurred. Adoption of a non-leaded gasoline alternative is likely but there may be some sacrifice in new aircraft performance. Some older aircraft may no longer remain viable and will need to be retired.

A newer class of very light aircraft, known as Light Sport Aircraft (LSA), was created in 2005. LSA manufacturers enjoy less cumbersome FAA certification requirements. The majority of LSA aircraft are certified to operate on non-ethanol containing, unleaded gasoline. These recreational aircraft are limited to two seats, pilot and passenger, with specified load and speed restrictions. Over the last ten years, this has resulted in many new designs, which are somewhat more affordable than previous factory models. The LSA industry is still relatively small and fragmented, with many designs entering and exiting the market. Most manufacturers produce only a handful of aircraft per year; however, the promise for more LSAs still remains strong. Several of the most successful aircraft are designed and constructed overseas. Most factory LSA models are still priced well above \$100,000. This is expensive in comparison with other hobby options and recreational vehicles. Storage and maintenance costs are similar to more traditional, light aircraft. Amateur built, experimental category aircraft also remain a popular niche for many dedicated, aircraft enthusiasts. These aircraft are generally built from established kits or plans.

GNV should continue to monitor technological improvements in electric powered aircraft. Continued improvements in battery storage capacity and lightweight materials have made light aircraft with limited range practical for training and recreational purposes. Improvements in hybrid and electric propulsion continue with significant research projects by major aerospace companies like Boeing and Airbus as well as tech companies like Uber. Significant inroads for general aviation are being made by a variety of small companies across the globe with many prototypes already flying. Some of these aircraft offer vertical takeoff and landing with automated flight control and navigation systems similar to drones. The added simplicity and safety of electric motors as well as double and triple redundancy in key systems should greatly increase safety and may eliminate the need for traditional piloting skills. At least one drone-like production prototype is already operating under FAA ultralight regulations, which do not require a pilot

license. A major question is whether FAA regulations and the insurance industry are able to keep up with or adapt to the changing technology. These aircraft and propulsion systems have the potential to cost far less than traditional aircraft depending upon certification and testing requirements. The need for quick charging stations and perhaps new fuels for hybrid aircraft may be needed at airports. Increased vertical landing and takeoff capabilities (VTOL) may reduce the reliance on traditional airports for local or short-range operations.

Previous FAA forecasts show continued decline in the number of registered, piston powered, fixed-wing aircraft through 2029, bottoming out at 141,195 aircraft. Numbers are expected to increase slightly by about .2% per year until 2033. Turbine powered fixed wing aircraft, which are more commonly used for business and government sector flying will fare better. The GA turbine fleet is expected to rise to about 3.5% per year through 2033 to 38,360 total aircraft. Jet aircraft growth is expected to outperform turboprops 3.5% to 1.7%. The helicopter fleet is likewise expected to grow at about 2.7% per year. Overall, the total general aviation fleet, including experimental and light sport aircraft is expected to grow by just .5% per year through 2033.

General aviation demand at GNV has followed the national trend and was considerably weakened after the financial crisis of 2009. Business and personal flying has not completely rebounded since that time. The top business sectors nationally that utilize business aircraft are (*in order*): 1) Industrials, 2) Consumer Discretionary Products and 3) Financial Services. While there are opportunities for future growth in these sectors, the Gainesville area is much stronger in the government and healthcare sectors. Historically, these sectors are not large drivers of business aircraft and private charter activity. Even so, Gainesville's major hospitals and strong medical community generate some significant and unique activity. These include air ambulance, organ transport (UF Health), and blood transport services (Life South). Many Major NCAA sports programs and events associated with the University of Florida also generate significant business and recreational aircraft visits, particularly during football season. This a unique benefit which also creates significant opportunities for private air charter for sports teams as well as occasional commercial fan charters. The annual Gator Nationals NHRA racing event also has national draw, particularly for team members and sponsors operating corporate jets.

The general business mood in the Gainesville area moving forward seems optimistic. Coordinated efforts between the University, local government and the business community has resulted in several successful start-up businesses and major expansions. Technology developed at the University of Florida should continue to be a key driver of future opportunities. Successes should help to increase the level of aircraft ownership and demand for business aviation services moving forward. At smaller, regional airports, one or two large employers can have a profound impact on the demand for general aviation services.

Opportunities

Aircraft Storage

GNV has sufficient, single-engine aircraft storage capacity at present and forecasted demand is modest. GNV owns 85 T-hangar units and 18 port-a-port hangars available for individual aircraft storage. Many of these units were constructed in the 1960s and 1970s during general aviation's peak. Additional T-hangar units were constructed in the early 1990s and again in the early 2000s, just prior to the last recession. The airport's T-hangar occupancy rate is currently around 90%. There are no immediate plans to build additional T-Hangar units.

T-hangars are generally constructed when there is a sufficient waiting list to justify the investment. Demand may be addressed either by raising the rental price or constructing more units, depending upon the philosophy of the airport operator and available land. Increasing the number of based aircraft helps to sustain local FBO's and other aircraft service providers. The airport has an interest in keeping such businesses profitable, as they provide fuel, mechanical services, avionics repair, overnight storage and other vital services and are a significant source of airport revenue. GNV's FBO provides occasional emergency mechanical services for airline aircraft, helping to minimize passenger delays and cancellations. The FBO also assists the airport in removing disabled aircraft from airport runways, after a landing incident. This also helps to minimize disruptions to airline operations.

GA aircraft are responsible for the majority of aircraft operations at GNV. Local flight training and personal aircraft flights help to increase local control tower operations. FAA has sought to close towers with low activity levels in recent years. Congress has intervened to keep many, lower volume, air traffic control towers open. GNV's tower has not been identified for possible closure, however, a higher activity level is beneficial to continued FAA support.

The older T-hangar buildings at GNV are structurally sound but are in need of some deferred maintenance and improvement. GNV is planning a project to rehabilitate roofs, repair doors, replace lighting, paint and make other improvements on several hangar buildings in 2019-2020. This should extend the life of the buildings an additional 15-20 years.

- GNV should continue to set aside land adjacent (north) to T-Hangar L for future T-Hangar or box hangar construction, depending upon needs.

The airport has one 14-unit shade hangar for light aircraft, located on the north ramp. Despite the low rental rate, shade hangars are less popular among aircraft owners and the existing shade hangar structure is underutilized.

- GNV should explore removing the existing shade hangar in the future and replacing it with either a T-hangar or individual box hangars for business aircraft.

There is still some ability to house corporate aircraft in the former Eclipse Hangar (48,000 s.f.), which is partially rented, however, a community storage environment is not desirable to many corporate aircraft operators. There are currently no unoccupied hangars for small to medium sized business jets or twin turboprops. The airport has identified a few sites close to existing taxiways, where additional box hangars of 3,600 to 12,000 square feet can be built. Some strengthening of adjacent ramp area may be required, depending on the aircraft type. These improvements are shown in the latest airport Master Plan.

- GNV should explore building spec hangars to take advantage of new opportunities to site business aircraft or a specialized aviation services business on the airport.

Fixed Based Operations (FBO) and Specialized Aviation Service Operations (SASO)

FBO Services - GNV currently contracts with one full service Fixed Based Operation. The FBO is operated by University Air Center, a locally owned company. UAC has no other airport locations. UAC's operating agreement expires in 2025. UAC provides a number of aviation services, including fuel servicing, major and minor mechanical repairs, avionics repair, aircraft charter and flight instruction. While UAC is currently the only fuel supplier on the airfield, their airport operating agreement includes some price controls that ensure prices are comparable to those at selected peer airports.

UAC has contracts with UF Health and the Mayo clinic for patient and organ transport services. UAC also manages blood transport aircraft for Life South. UAC also offers some owner and crew amenities including, flight planning and lounge facilities, coffee service and limited food vending, rental car arrangements and basic pilot supplies.

GA Terminal - UAC leases the airport's 5,900 s.f. general aviation terminal, constructed in 1955. The building is in good condition. It was extensively renovated in 2000 and improved again in 2014. The terminal houses UAC's office staff, line service and charter operations as well as public seating, food service and crew amenities for transient aircraft. The building is small and has limited space for a pilot's lounge, flight planning room and other amenities. There are no crew showers or food service offerings. There is a modest vending alcove with dining table. The GA terminal and amenities are generally not up to the standard of the latest, peer facilities in terms of space for needed services and FBO/community image.

Leased Hangars – GACRAA leases two bulk storage hangars of 12,000 s.f. (GA-17) and (GA-2). Hangar GA-17 was constructed in 2000 and is in good condition. It has no ancillary space for amenities or other functions. GA-2 (aka "WWII" Hangar) also houses the FBO's flight school and includes approximately 1,440 s.f. of finished space for office and training activities as well as 594 s.f. of semi-finished space for parts and supplies storage. The building is in fair condition. UAC has also constructed a 12,000 s.f. maintenance hangar (GA-9) on its leasehold specifically for aircraft mechanical and avionics repair. The building was constructed in 2004 and is in good condition. UAC has access to airport T-Hangars and the former Eclipse hangar at times for additional storage. The UAC leasehold does include land to build an additional bulk storage hangar of approximately 10,000-12,000 square feet with convenient apron access. The current fuel truck staging area would need to be relocated behind the hangars or other area in reasonable proximity. Investment in a fuel containment for a new, overnight truck staging area should be considered, in the event of leaks or spillage.

Aircraft Parking Aprons - UAC leases 215,000 s.f. of preferential use apron. The apron and adjacent airport owned aprons vary with respect to pavement strength and thickness. The airport has placed a weight limitation of 90,000 lbs. on the main general aviation apron due to uneven pavement strengths. Pavement strength is generally suitable for most any corporate jet that would visit the FBO. However, certain sections are suitable only for light aircraft (tie-downs) or smaller corporate jets. The FBO must properly manage where heavier aircraft taxi and park. UAC also performs ground handling of airline charters or the occasional military transport aircraft. These must be serviced on the commercial ramp, due to aircraft weight.

The overall size of the main apron is considered large enough for daily needs throughout the planning period. The airport has included strengthening portions of the general aviation apron in its Master Plan. This would allow more convenient servicing of some larger charter and military aircraft from the general aviation terminal.

Action Items

- GNV should continue to plan for eventual strengthening of portions of the general aviation apron for greater utility and to reduce the possibility of over stressing some pavements.
- GNV Should plan for eventual replacement of the building with a larger, more modern building in partnership with UAC or subsequent FBO.

- GNV should plan for eventual expansion of aviation fuel storage capacity, particularly Jet A storage in the current fuel farm location or on the commercial side for added efficiencies.

Commercial Flight Training

There is an increasing need for commercial pilot training worldwide. Recent increases in crew rest requirements and first officer experience exacerbate this need. A coordinated effort to attract more national and international flight training activities is worthwhile. UAC averages about 35 active flight students and graduate approximately 60 students seeking FAA ratings annually. UAC recently added helicopter training to its programs.

Gainesville has a strong education economy with the University of Florida, Santa Fe College and other outlets of higher learning. GNV does not have the beaches and resort attractions that are a draw to most major flight schools in Florida. However, Gainesville does offer the energy of a large student community, good weather, a variety of instrument approaches, an air traffic control tower, a secondary runway and an efficient airspace environment for training.

- GNV should help facilitate growth in this area by soliciting partnerships, leveraging state and federal grants for new facilities where beneficial and participating in joint marketing efforts.

Light Sport Aircraft

LSAs represent a small but growing segment of the aviation industry. While the number of Private Pilot Certificates continues to decline, the number of Light Sport pilots, although comparatively small, is growing. Some older pilots are converting to LSA aircraft because the requirements for medical certification are simpler. Such pilots are limited to daytime, VFR operations. Others are opting to purchase LSA aircraft, as they often deliver good performance for the dollar. A wide variety of sleek, modern and comparatively less expensive LSA designs are available, built with modern composite materials. This is possible due to less expensive FAA certification requirements for LSA. Many of these aircraft are capable, long distance flyers, employing modern GPS navigation displays. LSAs are limited to 1,230 pounds gross weight, a maximum stall speed of 51 mph, max level speed of 138 mph and two seats. Light Sport Aircraft can be factory built, or amateur built from assembly kits or plans. Amateur built aircraft are registered under an FAA "experimental" aircraft certificate (ELSA).

At present some FBOs, such as GNV's, do not repair or provide required annual inspections on LSAs or amateur built aircraft, due to insurance requirements. There are more than 33,000 amateur built aircraft registered in the United States. There were approximately 3,000 Light Sport Aircraft on the FAA registry in October of 2017.

- GNV should explore attracting new businesses specializing in producing, repairing and inspecting LSA as well as amateur/kit-built aircraft.

Large Aircraft Maintenance and Repair Operations (MROs)

Florida is home to a number of large aircraft maintenance operations the closest one being a large, legacy MRO located at the Lake City Airport. The bulk of these businesses are located in metropolitan areas or near major military installations where there is an existing, skilled workforce. Significant MRO operations exist in south Florida, along the Space Coast, near military bases in the Panhandle and the Orlando-Tampa corridor. Some of these have evolved or expanded operations at converted military bases, where there is generally a surplus of large hangar and apron space and a very long runway.

GNV attends various MRO industry conferences to attract these companies. The airport must compete with many other airports seeking to lure such firms. Often these airports have assumed operation of a former military base or have invested in site improvements, including thick concrete aprons or even large spec hangars. Some states provide cash relocation incentives, while Florida does not.

GNV has designated an area east of the control tower for future MRO and air freight operations. GNV's runway length and strength is suitable to support most MRO operations. However, GNV does not have existing hangar space or apron areas large enough or strong enough to handle large airliner maintenance. Constructing such infrastructure is very expensive and is not generally FAA-funded unless there is a demonstrated need.

GNV has a very small, aircraft maintenance workforce. Oftentimes, retired military technicians will locate and work near military bases. There are no air bases in north central Florida. There are also few companies engaged in aerospace, metal fabrication, composite materials fabrication, parts machining and support industries. The University of Florida does, have a large aerospace engineering department, which engages with aerospace companies on various projects. At some point, this may present a unique opportunity for GNV to partner with one of these companies in some way.

- GNV should continue to market its availability and network with MRO companies and the UF Aerospace Engineering Department.
- GNV should continue to identify land for future MRO development for both large and medium sized jet aircraft.
- GNV should explore opportunities to construct apron areas and infrastructure for future large aircraft MRO's or air freight operators.

Air Freight Services

Florida airports handle approximately 2.5 million pounds of airfreight annually. The large majority of dedicated air freighters entering the U.S. through Florida arrive at the Miami International Airport (MIA). MIA represents approximately 70% of Florida's total daily air cargo lift capacity at approximately 9.4 million tons* (*FDOT 2013 study). Much of this freight includes fresh flowers, live animals and perishable items from Latin America and the Caribbean. Other airports handling significant amounts of domestic and international air freight include Orlando International (11.2% of capacity), Fort Lauderdale (7.5%), Tampa (4.9%), Jacksonville (2.4%) and Palm Beach Intl (1.8%). Possible new cargo points of entry are being proposed in other South/Central Florida locations. Such locations require significant land and supporting infrastructure for development. They must be geographically positioned to reduce international aircraft stage length and have good access to the interstate highway network.

The current demand for high value air freight services in the Gainesville Area is still considered very modest, based on previous conversations with major shippers like FedEx and UPS. FedEx previously operated a small, airfreight feeder operation between GNV and JAX from 2003 until 2011. FedEx contracted with Mountain Air Cargo to operate two Cessna Caravan aircraft each day. FedEx cancelled the contract due to insufficient demand. Most of its priority freight was already being carried efficiently by truck between the two locations and the flights did not provide enough added value.

Today, almost all of GNV's high priority or perishable freight operations are shipped as airline belly cargo. There are no scheduled, dedicated freighter operations at GNV. Examples of area products typically shipped via the airlines include: live animals such as dogs, reptiles and tropical fish by area breeders; human eyes and tissues for transplant; biologically based medical devices and materials; and other

perishable, relatively low volume items. Transplant organs and blood are also shipped via smaller, private aircraft operated by UAC, Life South and others. GNV does not have a customs facility or dedicated inspection facilities and therefore cannot accept international freight items directly. It is not anticipated that the amount of international demand, whether freight or passenger, will justify a customs facility over the planning period. However, the move toward larger passenger aircraft increases the opportunity for the airlines to provide additional belly freight opportunities. Excess load capacity may provide incentives for reduced rates or volume discounts to area shippers.

- GNV management should periodically contact local users of air freight and major shippers like FedEx, UPS and DHL to assess local air freight demand and gauge interest in some type of air freight operation from GNV.
- GNV should continue to identify a location for future air freight facilities on its Master Plan.
- GNV should explore making initial investments in site development for a multi-use aviation facility, to include air freight, in order to pursue any available opportunity. Such improvements might include appropriately sized taxiway connectors, apron, site utilities and drainage improvements.

Aeronautical Facilities

Runways, Taxiways and NAVAIDS

The airport has sufficient runway length and weight bearing capacity to accommodate expected future growth during the planning horizon. Runway 11/29 is the airport's primary runway and is 7,504 ft. long by 150 ft. wide. Virtually all scheduled airline operations occur on Runway 11/29. The runway was rehabilitated in 2005 and the condition is "fair" with reflective cracking addressed by airport maintenance as needed.

The primary runway and associated taxiway meet the requirements for FAA Design Group C-III aircraft and is considered sufficient and long enough to accommodate aircraft expected to be placed in commercial service throughout the planning period. The runway length and weight bearing capacity are likewise sufficient to accommodate most opportunities for large commercial charter aircraft. However, some older generation aircraft with reduced single-engine climb performance are weight limited for departure on Runway 11. The runway runs uphill to the west and the surrounding rising terrain can limit the payload that can be carried. This particularly affects certain regional jet flights to DFW where an increased fuel load is needed. This condition can be alleviated by a change in aircraft from older 40-50 seat regional jets like the ERJ-145 and CRJ-200 to larger, more modern aircraft. These aircraft may be upgraded, once the market for this route is sufficiently proven.

The aviation industry has been focusing on safety of aircraft operations in the event of one engine inoperative (OEI). Unfortunately, airspace protection efforts at the state and federal level have focused on protecting approach procedure surfaces defined in Federal Aviation Regulations Part 77. Many airports are in need of improvements to their departure surfaces in order to make maximum use of available runway during higher gross weight departures. The effects are greatest during high density altitude operations (higher temperature and humidity). GNV would benefit by acquiring land or easement rights east of the airport to control trees that rise into the 40:1 departure surface for Runway 11. This would increase the allowable gross weight for some critical airline and charter operations. Chapter 333 Florida Statutes and resultant local zoning regulations do not include departure surface protections.

Florida Statute 333 does require protection of future Approach Surfaces as shown in the approved Airport Master Plan. Since GNV has included a future ILS on runway on R/W 11, an argument can be made that local zoning is required to protect the planned 50:1 and 40:1 Approach Surfaces specified in FAR Part 77. Obstruction removal to this level would have a significant impact on treed areas on a few private and publicly owned properties.

- GNV should explore acquiring sufficient property rights west of the airport and clearing or topping trees to maximize potential use of its 7,500 ft runway for departure and a potential ILS approach. An updated aerial survey is recommended to identify all potential obstructions to both the 40:1 Departure Surface from the very end of Runway 11 as well as a future 50:1 Approach Surface. Property rights can be obtained by either fee-simple purchase, purchase of airspace above the ground through an avigation easement or through local zoning regulation. Fee-simple purchase offers the most secure alternative to maximize airport assets and ensure future compatible land uses. In The land purchase would offer GNV the opportunity to partner with the City or others to make the property available for commercial or industrial uses or for park or conservation lands, so long as tree species and heights are strictly controlled.
- GNV should acquire approximately .4 acres that is within the Future Runway Protection Zone (RPZ) for the planned Runway 11 ILS approach.

A 500 ft. extension at the approach end of Runway 29 has been included as a placeholder in the Airport Master Plan. This extension would be expensive for the additional length gained but would accommodate some additional opportunities for military aircraft fueling. Military aircraft needs cannot be used as justification for FAA project funds under current rules.

The runway weight bearing capacity is sufficient for the number of operations and types of scheduled, commercial aircraft expected over the planning horizon. Runway 29 is served by a Category I ILS, MALSR and HIRL lighting. This has proved sufficient for the prevailing weather conditions experienced at Gainesville. Additional GPS based approach procedures are available, as well as VOR approaches to both runway ends, The Gainesville VORTAC is located midfield. The VOR portion is scheduled for decommissioning by the FAA by 2020 as part of their transition. FAA is decommissioning most VORs across the country in favor of satellite-based navigation. GNV is served by several GPS approach procedures. The loss of the VOR is not expected to hinder local IFR operations but may provide some local training value. The FBO and major GNV tenants have not objected to FAA's planned removal of the VOR.

The Gainesville area generally enjoys good ceilings and visibility most of the time. Early morning fog is more prevalent in late fall and early spring, when winds are generally calm. Ground fog will generally burn off by mid-morning, which favors late morning airline arrivals. Scheduled flight cancellations or delays due to weather below available IFR minimums are rare. As previously stated, GNV does have inclusion of an ILS to Runway 11 in its Master Plan, which would provide lower minimums when prevailing winds are from the east. GNV performs Approach Surface ground siting surveys annually to establish the location of controlling obstructions. remove obstructions identified in various approach surfaces and to minimize the published controlling obstruction. Aerial surveys are completed from time to time to identify all surface obstructions and the FAA regularly evaluates obstructions on its published approaches using special flight-check aircraft. The FAA Flight Procedures Branch uses this data to set approach ceiling and visibility and weather minimums.

- GNV has the opportunity to improve FAA minimums to some of its non-precision approaches by completing an aerial survey and removing and certifying tree removal beneath some of these approaches on a regular basis. A cost/benefit analysis of the extent and frequency of tree removal to minimize certain approach minimums should be considered.

Runway 7/25 is a secondary runway and is 4,158 ft. long by 100 ft. wide. The runway was rehabilitated in 2014 and the condition is “good” with little or no reflective cracking. This runway meets FAA Design Group II standards. The runway is long enough to handle most general aviation operations. Runway 7/25 is convenient to the FBO and general aviation hangars. It is used primarily by piston powered aircraft and smaller business jets, which account for the majority of GNV operations. This is valuable in that a landing incident on this runway will generally not result in a disruption to airline service, unless the aircraft is disabled within the portion inside the Runway 11/29 Safety Area. The airport’s Master Plan includes eventual extension of RW 7/25 to an ultimate length of 6,500 ft. and conversion to a FAA Design Group III. The runway should eventually be “decoupled” from the Safety Area of RW 11. The interim extension would allow use by scheduled airlines when the primary runway is down for maintenance, rehabilitation or experiences a landing incidents or accidents. Extension of the runway would not occur until the latter part of the planning period, depending on available funding. The FAA currently does not fund improvements to RW 7/25 as there are no capacity constraints or wind coverage problems on RW 11/29.

Runway 11/29 provides over 95% wind coverage for most aircraft operations and is at around 30% of capacity. No additional runways are needed during the planning period.

- GNV should continue to explore extension of Runway 7/25 to a length sufficient to maintain airline operations when Runway 11-29 is unavailable.

The taxiway system, lighting systems and NAVAIDs are likewise sufficient to meet anticipated, commercial aircraft demand. Taxiway pavements are generally in very good shape, with most having been rehabilitated within the past 12 years. The primary exception is a portion of Taxiway A, which is in fair condition and is scheduled to be repaved in 2022.

Some taxiway geometry does not meet the most recent changes to FAA design circular AC 150-5300-13 in all respects. Upgraded taxiway fillets are required in some areas. FAA now requires the eventual elimination of any direct access between an aprons and runways to reduce the possibility of runway incursions. Angled taxiway entrances to runways and curved ends of parallel taxiways should also be eliminated. The airport has developed a preliminary funding plan with FAA for modification of Taxiways A and C. These improvements are scheduled to occur between 2022 and 2025 and will not affect airfield capacity during construction. Some operational impacts to IFR operations are expected and must be mitigated.

Update of Taxiways B and E will be addressed in the future, before repaving or lighting rehabilitation are required.

Airfield lighting is likewise in good shape, with most systems having been replaced or upgraded within the last twelve years. The lighting systems as presently configured are believed by management to be sufficient for anticipated operations during the planning period. Some rehabilitation or replacement of the oldest systems will be programmed at some point, due to degrading cable health over time. Precision Approach Path Indicator Lights (PAPI), installed in 2005, should also be scheduled for rehabilitation during the planning period. New LED lighting will be installed on Taxiway C at the time of taxiway replacement

in 2024-2025, subject to FAA funding availability. A MALS system on Runway 11 would be added at the time of ILS installation, should the Authority decide to pursue this project. The FAA may require that the Authority agree to install and maintain any new ILS installation. The Authority will need to weigh the additional costs and responsibility vs. potential benefits received.

Air Traffic Control Tower

The existing air traffic control tower (ATCT) was constructed by the FAA c.a. 1971. The facility is maintained by FAA and is in fair condition. The tower height is 48.5 ft. with a cab floor height of 34 ft. The cab line of sight is considered acceptable, but marginal, with line of sight restricted in select areas. Visibility limitations at the current height are primarily due to the mid-field VOR station and wooded areas (including wetlands) adjacent to the southern and northern approaches of Runway 7 and 25. Visibility along the primary runway, 11-29 is excellent. The northern portion of Taxiway A is not visible from the tower due to forested wetlands. This area has been designated a non-movement area (not under tower control). The limited height also does not allow discerning whether aircraft are on Runway 7-25 or the parallel taxiway (T/W A) without optics. This line of sight compromise has been accepted since the towers original design and construction.

FAA has periodically upgraded equipment within the building, including radar displays and life safety equipment. The location of the tower is considered good based on current topography and available land, road access, available utilities, security concerns, prevailing atmospheric conditions, lighting and sunlight effects, line of sight and runway configuration. This was affirmed in a formal site selection study for a new tower completed in January, 2014. Three primary ATCT sites were evaluated. A location adjacent to the existing tower was selected, should a new tower be constructed. The optimum eye level height of a replacement tower was recommended to be 98 ft. The overall height would be 123 ft.

FAA recently determined that the existing building has a life expectancy of at least twenty additional years and has no current plan for replacement. GNV may opt to replace the building using available grant funding and local funds, should it choose to do so. However, should GNV decide to construct the ATC tower, the airport would be responsible to take on tower maintenance and utilities, including elevator and emergency generator maintenance and janitorial services. GNV would also be required to provide certain ATC equipment, including two-way radios, and provide for their maintenance as well. All of these expenses are currently paid for by the FAA. The cost for construction of a new tower of the recommended height is estimated at \$4.0 to \$4.5 million. Annual O&M costs are estimated at \$60,000 per year, not including depreciation or planned capital replacements.

The current air traffic control tower does not have an engine generator for full back-up power in the event of a sustained power outage. The FAA does not authorize full back-up power for level 1 towers like GNV. A back-up generator for life safety functions is available as well as limited battery back-up for two-way radios. GNV operations do continue when the tower is closed or out of service, with airspace reverting to Class E and IFR arrivals and departures controlled by Jacksonville Approach Control.

- GNV has included installation of full engine generator for the ATC tower at its own expense in its capital improvement plan. GNV will likely be required to take on maintenance of the generator.
- GNV should continue to explore options for replacement of the ATC tower or continue lobbying FAA to replace the tower ahead of its current schedule.

Airfield Drainage Infrastructure

Portions of the airport are located in areas of wetlands, poor draining soils and high, water table. Rehabilitation of drainage infrastructure over time is essential to the long-term viability of any facility. The airport is now more than 75 years old and some of the basic airfield drainage infrastructure and major conveyance ditches are original to the airport. Some culverts were constructed before modern techniques like fabric wrapping of pipe joints was used or modern joint materials were available. Rehabilitation and improvement of airfield drainage systems is recommended in various areas for extended life of airfield pavements and faster drainage of turfed areas. Improved drainage will result in more efficient mowing and maintenance operations and eliminate or reduce the occurrence of flooding during hurricanes or severe rain events. Standing water in ditches and retention areas acts as a wildlife attractant and should be minimized.

GNV was quickly established as a WWII, training field circa 1941. Consideration for drainage longevity, wildlife attractants and environmental concerns were very different then. There are large, open ditches along the full length of Taxiway Alpha, and along the south east side of the Runway 11/29. The general aviation side of the airport primarily drains into a large, vegetated ditch along the north western border, which is now considered Little Hatchet Creek. Erosion, vegetation and resulting sediment have degraded performance of various ditches and many corresponding concrete structures have deteriorated over time. The portion of Little Hatchet Creek on airport lands picks up natural phosphorous from underlying soil layers and deposits it in Newnan's Lake. This is a source of nutrient pollution. This portion of the creek is thought to contribute about 6% of the total phosphorous in the lake, which is highly eutrophic. GNV has explored piping in the portion of the creek that would be in the safety area of a future expansion of Runway 7-25, which is outside of the planning period. GNV staff should continue to work with the City of Gainesville, Florida and County DEP to develop best options for piping in the ditch and securing grants.

GNV conducted an FAA-funded evaluation of airfield drainage structures in 2015. The study recommended a phased approach to improving various areas over time, including a budget estimate. An extensive project has been included in the airport's capital improvement program for possible FAA and FDOT funding within the planning period. The project includes piping in several open ditches, ditch grading and stabilization and replacement of various structures and culverts.

Storm water treatment is not required for basic airfield pavements but is required for other airport developments. The airport has a number of storm water detention and treatment areas associated with non-airfield related developments, such as aprons, parking lots, hangars and various buildings. Storm water detention and treatment takes up significant land and is a required part of any future development.

- GNV staff should explore the potential benefits of developing a Storm Water Master Plan to streamline permitting and minimize impacts to developable land.
- GNV should continue to prioritize a phased approach to drainage rehabilitation in its Capital Improvement Program.

Aircraft Rescue and Firefighting (ARFF)

GNV has two, FAA Index B, aircraft rescue and firefighting vehicles. These vehicles when combined together with their crews, meet the requirements of Index C. The longest aircraft with five or more daily departures determines the Index.

GNV is currently required to meet FAA index B. Aircraft of Index C or higher do operate from GNV at times, but not at the frequency that would cause a permanent bump in index. The largest aircraft in

scheduled service in 2019, at least seasonally, are the Airbus A-321 and the McDonnell Douglas MD-88. Both aircraft are of a length to be considered Index C, but are not expected to operate at five or more daily departures during the planning period.

A new ARFF facility (replacement) was completed in 2017 and has room to add a third ARFF vehicle, when needed. The ARFF station and current ARFF vehicle capacity is expected to be adequate for the foreseeable future. One of the existing ARFF vehicles is aging out and is scheduled for replacement in 2022, as soon as FAA funding guidelines allow.

- GNV should consider maintaining the older vehicle as a back-up or to meet occasional requests by large aircraft charter operators to provide Index D to meet company (not FAA) requirements.

GNV owns the ARFF station and the vehicles but contracts with the City of Gainesville for trained, ARFF personnel. The terms of the current arrangement are thought to be favorable.

- GNV staff should periodically evaluate the terms of the city contract vs. contracting with other entities (*County/private*) or performing the ARFF function in-house.

Fuel Storage Facilities

GNV provides storage for fuel purchased on consignment by the airlines as well as all fuel sold to transient and based aircraft operators via the FBO. In 2018, approximately 3.2 million gallons of aviation fuel moved through the storage facility and into FBO refueling vehicles. Approximately 97.7% of this was Jet A fuel and 3.3% was aviation gasoline (AVGAS). GNV has four, 15,000 gallon above ground storage tanks within a single containment dyke. Each tank must be dedicated to a single product so no comingling of fuels can occur. Three tanks totaling 45,000 gallons is dedicate to Jet A storage and one 15,000-gallon tank is dedicated to AVGAS 100LL storage. Four, 600-gallon motor fuel tanks providing diesel and unleaded gasoline for GACRAA vehicles are also located within the facility. GNV plans to install an engine generator at the facility in 2019 as part of its hurricane preparedness efforts.

GNV employees perform fuel quality inspections, receive fuel deliveries, and perform safety inspections and periodic maintenance of the storage facility in accordance with FAA and industry standards. Fuel delivered into the tanks must settle 8-10 hours before delivery into refueling vehicles. This allows any water or other contaminants to settle out before pumping. The required settling time reduces the number of times the inventory in each tank may be turned over in a given period. Available Jet A capacity is considered marginal when special operations, such as military exercises, major football games or other unique activities occur. Fuel deliveries vary somewhat month to month following variations in airline passenger demand. Usage is generally about 18-20% lower in the summer months. March and October are generally peak months principally due to additional activity associated with the Gator Nationals drag racing event and Gator home football games, respectively.

In 2018, Jet-A volume was 3,061,500 gallons, resulting in tank turnover of 22.6 times per year or approximately every 13 days. Tanker truck deliveries are limited to about 7,500 gallons and deliveries are received about 7 to 8 times per week. AVGAS deliveries in 2018 totaled 176,641 gallons, resulting in a turnover of approximately 11.7 times per year or about every 31 days. AVGAS deliveries occur about every two weeks. The contents of a tank must settle when new fuel is added, restricting access to the balance of fuel in the tank until the settling time has passed. GACRAA staff must therefore manage the inventory in each tank so as to minimize settling impact after delivery. When two fuel loads are received in a single day, fuel can only be accessed from only one remaining tank. This can cause issues if the airport

experiences unusually high demand, such as during a military exercise or airline weather diversions. The possibility of a temporary shortage will increase with growth in aircraft operations over time. Generally, the FBO's refuel can be filled first, providing enough inventory to cover demand during the settling time.

The current storage site is considered adequate and is expandable. The current aboveground tank installation is in good condition. The site is located adjacent to NE 49th Ave. The road has relatively light traffic and is easily accessible by tanker truck. While located on the GA side of the airport, it is not directly adjacent to the FBO leasehold, resulting in some lost travel time and internal road stresses from fully laden tanker trucks. Internal road damage has not been an issue so far, but may need to be examined if larger refueling vehicles are desired. The current site is located adjacent to the public roadway, which is not optimal for security. There are no occupied buildings in close proximity to the site. The site is well-lit and protected by an 8 ft. chain link with concertina wire, CCTV and security access controls. There is no history of vandalism at the site.

Should larger tank trucks for airline servicing are needed or when additional storage volume, a second facility closer to the commercial terminal ramp may be desirable for efficiency and limit travel on internal roadways.

Commercial Terminal

The core of the 57,000 s.f. commercial terminal was constructed in 1979. The terminal has undergone some organic expansion based on operational needs since that time. The baggage area was expanded and renovated in the 1990s and a new roof was put on the entire building. The terminal interior underwent a major renovation in 2008, including the terminal chiller plant, boiler and most HVAC controls and air handlers. The secured gate area was expanded at that time by enclosing an unsecured, interior courtyard with a large skylight. The roof is again in need of replacement. A new roof is planned during the next expansion project, which is scheduled to begin at the end of 2019.

The organic growth of the terminal within the existing site and tight construction budgets have required some compromises vs. a clean sheet design, as can be expected. There is a shortage of space available for storage of supplies and equipment. Some surplus, flexible space for changing administrative needs of stakeholders and to accommodate new service opportunities is needed. Exterior tug drive and ground equipment circulation space is tight.

Utility services are expected to be adequate during the planning period. The terminal is heated with an oil-fired boiler with a 6,000-gallon oil tank located in a non-public area. The terminal area is not served by natural gas. Natural gas would be more efficient for terminal heating and provide additional cooking options for food service vendors. The terminal is served by DSL and coaxial cable service for internet and telephone. Fiber optic service was provided to the air traffic control tower in 2018. AT&T has plans to install fiber optic lines to the terminal in 2019. Several hangars have fiber optic service provided by GRUCOM and others. The airport has its own fiber optic network for internal airport needs, connecting all occupied buildings and key equipment.

The airport is served exclusively by Gainesville Regional Utilities for electric power, water and sewerage. Electric power capacity is considered adequate and the main transformer supplying the terminal is considered sufficient for the current expansion project. A larger transformer will likely be needed for future expansion.

The terminal is equipped with a back-up diesel generator that provides emergency power for all life-safety, emergency lighting, security/access controls and flight critical operations. These flight critical operations include: Airline passenger processing at the ticket counter and the gate, operation of outbound and inbound bag conveyors, and TSA passenger and baggage screening equipment, and all sanitary/toilet facilities. Generator capacity does not cover heating and air conditioning, food service equipment or movement of passenger boarding bridges. Boarding bridges must be moved manually by towing. A second engine generator is planned for installation in 2020 which will include passenger boarding bridge movement and aircraft auxiliary power functions.

A new 8-inch water line is being installed in 2019 to support future terminal expansion and some future commercial development along the west access road. The line will be operated and maintained by GRU. A new sewerage lift station is also being constructed to support the west side gate area expansion. The lift station will be owned and maintained by GNV. A second, airport owned lift station was constructed to serve the new ARFF station in 2017. Sanitary sewer service is not currently available along the west side access road and will require considerable investment in a lift station due to the elevation and distance to the nearest GRU access point.

Electric power rates in Gainesville are among the highest in the state. GNV has converted most of its parking lot and exterior lighting on the landside to LED. GNV has plans to convert most of the terminal interior lighting to LED in 2020. The airport has a 300 KW solar power array located on the terminal roof and approximately 30 KW located on the car wash facility. Power generated is net metered and sold directly to GRU. Most airfield edge lighting has also been converted to LED where allowed by FAA. Airside ramp lighting is typical mercury vapor HID lighting.

- The airport should continue to explore alternative options for electric power to reduce costs.
- GNV should continue its program to convert exterior HID lighting to LED and to investing in more energy efficient equipment. Terminal and GA apron lighting should be retrofitted to LED as acceptable fixtures become available.

The terminal's post-security passenger lounge fills to capacity with increasing regularity due to the move toward larger aircraft. Concurrent flights and delayed flights can result in close conditions. Restroom capacity in the secured passenger lounge is insufficient. There is no opportunity for future vending or service opportunities within the terminal due to available space.

The airport has embarked on a project to construct a 15,200 s.f., two gate expansion of the terminal beginning in 2019. The expansion will allow all overnight flights to be parked at a gate and will provide some excess seat capacity and daytime gate availability for expansion. The project allows for some additional, linear, gate expansion to the west to accommodate further growth over the planning period. GNV should maintain additional potential for a linear expansion of the gate area to the east as an option, maintaining efficient circulation by airline ground service equipment (GSE). The current expansion includes an update of some finishes in the existing public spaces, replacement of several HVAC units and retrofit to LED lighting for improved energy efficiency.

GNV's airline ticket office (ATO) area is presently occupied by two airlines. The counter/ATO area was designed pre 9-11-01 and is not well suited for integration of the explosive detection system (EDS) bag screening system. Two of the four counter segments do not have an outbound belt from the single, TSA operated EDS machine, which is located on the lobby floor. Passengers must carry bags from all counter

stations to the EDS machine for TSA screening. This was common configuration after 9-11. Ideally, passengers should check their bags at the airline counter and airline personnel should place the bag on an outbound conveyor feeding the EDS screening machine and exiting to an airline specific or common use bag make-up carousel.

While no new air carriers are pending, GNV has limited airline ticket office space for potential new entrants. The airlines serving GNV and the number of potential new carriers have greatly consolidated over the years. At the same time, airline operators have desired more finished space for operations, bag storage and IT equipment. The amount of counter space needed in comparison to office space has likewise diminished over the years, as new self-check-in and remote check-in technologies have been employed. Currently, GNV's two carriers require all of the available ATO space, while leaving two counter locations vacant. These counter positions do not have access to the outbound bag handling system (BHS) exiting from the TSA bag scanning machine.

GNV is equipped with a single explosive detection system (EDS) bag scanner owned and operated by the TSA. While machine failures are very rare, currently, all bags must be hand searched in the event of an EDS failure. Such failures will often result in some passengers missing their flight. Deployment of a second EDS machine must be approved by TSA and is largely dependent upon capacity needs.

- GNV should improve the balance of office space to existing ticket counter positions to better facilitate opportunities for new carriers.
- GNV should pursue plans to expand available airline ATO space and make all counter locations accessible to the baggage handling system.
- GNV should pursue plans to install a simple, but effective in-line baggage system to improve the customer experience, maximize TSA baggage throughput and improve airline efficiencies.
- The baggage handling system should be designed for the addition of a second EDS machine to handle increased demand during the planning period and to offer redundancy in the event an EDS machine goes down. GNV should lobby TSA for deployment of the second EDS machine at the earliest, allowable time.

The baggage claim area was expanded in the 1990s to add a second, shorter, bag claim carousel. The building expansion was designed to add a third carousel when needed. Two bag carousels have proved to be adequate to serve the existing flight schedule as only two airlines are currently operating and the airline staff only turn one flight at a time. The second carousel generally offers sufficient redundancy in the event one carousel is out of service. Should a third airline begin operations and as the number of flights continues to increase, some bag claim conflicts are likely.

- GNV should plan for installation of the third bag carousel during the planning period to avoid flight conflicts and provide additional redundancy during occasional breakdowns.

Several airport employees and stakeholders were asked to provide input on potential future airport terminal needs, including local and corporate representatives of both airlines and all rental car operators. Several of the following improvements are already underway or planned. Considerations for future terminal provisions include:

1. Additional food and beverage options for passengers
2. Additional passenger device charging stations
3. Continuous, high level, Wi-Fi enhancements to facilitate carrier adaptation of new check-in and gate processing technologies like self-bag tagging and portable devices for check-in.
4. Continuous improvement in passenger Wi-Fi.
5. Continuous improvement in passenger information systems, including flight and terminal information push via mobile devices, interactive visual information displays and PA system improvements.
6. Expandability of TSA security checkpoint to accommodate growth/larger aircraft and biometric screening systems.
7. ATO space that meets current carrier standards but is expandable to meet future needs as larger aircraft are introduced, including increased demands for electrical power and data.
8. Unmanned secure exit lane technology for passengers exiting the hold room
9. Flexible gate and ramp space to accommodate aircraft of varying sizes with adequate safety envelope between aircraft.
10. Remote aircraft parking areas adjacent to the terminal for aircraft overflow. Potentially facilitate ground loading as necessary to minimize towing.
11. Large enough bag make-up area for staging of multiple carriers at the same time
12. Improvements in outbound belly freight options, including live animal shipping.
13. Large enough bag claim space to accommodate larger aircraft and multiple arrivals at the same time
14. Additional covered storage areas with self-charging outlets for airline ground equipment
15. Ability to expand baggage claim as needed to include a future Bag Service Office (BSO) for passengers to make claims, if necessary, in lieu of returning to the ticket counter.
16. Provisions to expand automobile parking to handle increased demand by passenger, rental car operators and employees.

TSA Screening Resources

TSA resources must also increase to maintain acceptable screening throughput as passenger demand increases. TSA staffing (FTE's) had been steadily declining since original startup post September 11, 2001 due to budget pressures, even while GNV passenger loads were increasing. TSA's single lane staffing and equipment model generally remains static until the airport reaches 250,000 enplanements. GNV will soon achieve this milestone. In 2017, GNV was effective in achieving a second screening lane and an increase in TSA's labor allocation. While GNV now has a second X-Ray lane, current staffing only allows selective use of the lane during peak departure times. Wait times are now generally considered good. The presence of a second lane allowed TSA to implement its "Pre-Check", streamlined screening option for qualified, enrolled passengers. This service is highly valued by frequent fliers who pay a fee to enroll. A full-time pre-check lane would be a significant customer service improvement.

The planned terminal expansion will better accommodate the second screening lane. While two lanes are expected to provide enough throughput for the foreseeable future, there is enough internal space to accommodate a third lane, with modifications, should that become necessary.

- GNV should continue to lobby for additional staff to allow full-time "Pre-Check" operations, ahead of the 250,000-passenger enplanement milestone.

Automobile Parking Facilities

Existing surface car parking facilities include approximately 850 paved spaces. There are no covered spaces or walkways within the parking lots. There are no charging stations for electric vehicles. Automatic pay stations were installed in 2015 reducing wait times by adding a third exit lane. The main lot was expanded by 165 spaces in 2018. A 75-car paved, employee lot was converted for dual employee/overflow passenger use in 2017 by the installation of an automated pay system and gates. Limited overflow grass parking has been set up as needed in the long-term west lot and for displaced employee parking adjacent to the long-term east lot. The pavement condition of older sections of the parking lot is “fair”. Repaving has been deferred due to the lack of suitable, alternate parking.

The airport terminal and parking facilities are at capacity during peak events. Recent efforts have provided for needed capacity during peak times but will not provide for additional passenger growth. Finding available parking can still lead to confusion and frustration for some passengers during peak seasons.

Predicted new technologies like self-driving cars may greatly reduce demand for automobile parking spaces in the future and have significant effect on GNV revenues. Parking is about equal with airline rates and fees as the largest source of airport operating revenue. It is accepted by many that practical self-driving cars are still 15 years away, at best. Newer technologies are already having an effect on airport parking and rental car demand. Transportation Network Companies (TNC’s) like Uber and Lyft have wide acceptance and have supplanted traditional taxis. They are also attractive to some local travelers that wish to avoid parking at the airport. While demand for parking continues to grow as passenger enplanements rise, the rate of growth is less than would normally be expected due to the increasing popularity of TNC’s. This should be taken into account when sizing new parking facilities.

The continued increase in the use of electric and hybrid vehicles should cause GNV to consider “plug-in” infrastructure and power billing systems in new parking construction or retrofit of a portion of existing spaces.

GNV passengers appreciate the airport’s comfort and convenience and are willing to pay a premium air fare for these benefits. Walking distances both outside and within the terminal are short as are TSA waiting lines. GNV has limited available land area for surface parking and associated stormwater requirements. In addition, the airport has a desire to keep walking distances short and to provide maximum protection from the weather for customers and their vehicles. The ideal parking facility would be a multi-level garage in close proximity to the terminal. The location should minimize conflicts between pedestrians and ground vehicles while affording maximum accessibility. The preferred concept would incorporate a covered, bus transit facility with seating and restroom availability as well as flexible, covered space for use by Transportation Network Companies like Uber and Lyft, taxicab queuing area and rental car ready return and/or pick-up areas.

- GNV should proceed with a concept study of a new parking garage, to include sizing, vehicle and pedestrian flow, preferred traffic configurations, integration of various ground transportation modes, cost estimates and financial analysis. The preferred concept should then be developed to the static design level providing a more detailed cost estimate. GNV has already begun capital planning for a parking garage and has identified potential funding sources. A placeholder cost of approximately \$11.5 million dollars for a 500-space multi-modal ground transport facility and garage is being used until the concept design and a more detailed cost estimate have been completed.

Current Terminal Expansion, Funding and Phasing

A Terminal Expansion Study completed in 2013 and subsequent Terminal Planning Whitepaper: 2015, recommended a phased expansion of the building and parking facilities. Expansion must occur in a timely manner in order to accommodate modest growth. Additional gate and airline ticket office space is recommended to better accommodate an opportunity for a third air carrier. Additional curbside vehicle access and road improvements will eventually be needed to safely accommodate vehicular traffic in front of the existing, single-level terminal.

It is believed the airport has sufficient, useable land adjacent to the terminal building to accommodate terminal expansion over the planning period and beyond. The available land is appropriately zoned. Future expansion can be accomplished with minimal utility improvements and environmental impacts. Utility improvements to serve initial terminal expansion were underway in 2018. A new 8-inch water line will be installed between SR24, Waldo Road, and the terminal area. A new sewerage lift station will be installed under the project to serve gate area restrooms and a future food concession.

GNV Expansion should maintain or improve the current level of service, preserve and enhance passenger comfort and convenience and facilitate air service growth. Prudence would dictate that a phased, commercial terminal expansion be undertaken on a “pay as you go” basis. Financial gains realized from new air service can be short-term as carriers change focus in search of more profitable routes. Ideally, the project should provide an increase in net income or be revenue neutral and not add to the airport’s current debt load or the cost burden of the airlines. Management endeavors to fund improvements to the maximum extent possible with Passenger Facility Charge Collections and federal and state grants.

Airport staff expects to secure grant funding necessary to complete the planned 15,200 s.f., two-gate expansion, roof replacement, restroom and misc. improvements in FY19. The balance of the project would primarily be paid with FDOT and PFC funding, which has already been secured. Less than \$100,000 of GACRAA funds is anticipated to pay for 50% of the non-public areas of the future food concession. This is a federally ineligible area.

Partial FAA grant funding is being programmed to install an in-line baggage system, new baggage make-up carousels in 2022 (Terminal Phase IV). FDOT and PFC funding for the project has already been secured. An expansion of airline ticket offices to better accommodate additional carriers is being considered at the same time. A majority of the ticket office work will not be eligible for federal funding and may require a significant investment of airport funds. This phase of the project will be further studied and a more refined cost estimate and funding scenario will be completed in 2019.

The following major terminal area improvements have been prioritized over the planning horizon:

0-5 years

- Approx. 15,200 s.f. Terminal Gate Area Expansion and installation of two, raised passenger boarding bridges for narrow body aircraft. (Terminal Expansion Phase II and III)
- Expansion of sterile area public restrooms (Terminal Phase II)
- TSA Screening Area Expansion – Better accommodate the new second screening lane for faster processing (Terminal Phase II).

- Install mini-inline baggage screening system – relocate EDS machine and increase ticket lobby space, provide outbound bag conveyors and bag make-up carousel screening conveyor access to all ticket counter locations (Terminal Phase IV).
- Expand airline ticket office space to accommodate up to two new airline entrants (Terminal Phase IV).
- Construct parking garage (perhaps 500-600 car capacity) with possible bus transfer facility and covered taxi and/or TNC staging area and rental car drop-off area.

Continuous Terminal Planning and Budgeting

GNV's terminal area planning should be kept current and should reflect the latest forecast enplanements. Planning should also consider trends in passenger preferences and expected changes in airline equipment and operations.

- GNV should begin terminal planning efforts soon to be well positioned for expansion when the need arises. Future needs may include gate space to accommodate new RON flights and early morning departures, enhanced food and beverage alternatives, baggage delivery office, additional space for terminal operations, security and storage.
- GNV should explore a separate administration building to eventually move some administrative functions away from the terminal and provide more space for terminal related functions. This may be the most efficient option to increase space with minimal disruption.

5-10 Years and longer-term Improvements as needed

- Add Third Lane to Terminal Curbside
- Continue linear terminal expansion by adding additional apron and gates to accommodate narrow-body and regional jet aircraft.
- Plan for replacement and possible relocation of terminal cooling plant.
- Add third TSA screening lane adjacent to existing or reconfigure all screening lanes beneath skylight area. Remodel existing TSA spaces for additional police and TSA use.
- Add additional ticket counter space to west end of terminal when appropriate. Consider including additional storage, administrative spaces, etc.

Arterial Roads and Ground Transportation

The attraction of regional airports is their convenience and proximity to the communities around them. GNV serves a fairly large section of north central Florida. Air travelers arrive at the airport almost exclusively by automobile, either private or for-hire. GNV's suburban location in North east Gainesville is close to downtown, the University of Florida and major businesses and neighborhoods within the city. The airport is located approximately 10 miles from I-75. There is no expressway between I-75 and the airport.

Preserving convenience to outlying counties and major population and business centers in southwest Gainesville is greatly dependent upon acceptable traffic flow on urban arterial roads, specifically 39th Avenue (SR26), Waldo Road (SR24), Archer Road (SR24) and Williston Road (Hwy 331). These roads are

subject to considerable congestion, particularly during peak drive times. There are also numerous school zones and crossings that further slow cross town traffic. As a regional facility, GNV also relies on efficient flow of I-75 and Highway 441, major north and southbound arterials serving outlying communities.

Current capacity of key roadways was found in the Metropolitan Transportation Planning Organization for the Gainesville Urbanized Area's Multimodal Level of Service Report for 2017, Dated December 31, 2018. The report notes the following capacities on key road segments:

- SR24 (NE Waldo Road) just north of 39th Avenue is at **48%** of capacity and provides a Class C level of service.
- SR 24 (Waldo Rd) south of 39th Ave. is at **66%** of capacity and provides a Class C level of service.
- SR 222 (NE 39th Ave.) east of SR24 and adjacent to the airport ranges from 32% - 42% of capacity and provides a Class C level of service.
- SR 222 (NE 39th Ave.) west of SR24 ranges from **47% to 73%** of capacity and provides a Class C level of service.
- SR 222 (NW 39th Ave) east of I-75 ranges from **63% to 79%** of capacity and provides a Class C level of service.
- SR331 (Williston Road north of I-75 ranges from **58% to 72%** of capacity and provides a Class C level of service.
- Highway 441 north of NE 39th Ave. ranges from **30% to 46%** of capacity and provides a class C level of service.
- Highway 441 south of Williston Rd. is at **43%** of capacity and provides a Class C level of service.
- I-75 south of Williston Rd. is at **82%** of capacity and provides a Class B level of service.
- I-75 between Williston and NW 39th Ave. ranges from **70% to 49%** capacity with Class of Service ranging from B to C.
- I-75 immediately north of NW 39th Ave. is at **49%** of capacity and provides a Class B level of service.

Roads close to the airport must offer efficient travel at least 1 to 2 hours prior to peak departure times. Peak early morning departure times at GNV typically occur between 5:00 a.m. and 7:30 a.m. allowing travelers to miss much of the morning rush hour. Mid-morning departure times typically occur between 9:30 a.m. and 11:30 a.m. somewhat overlapping rush hour drive times. Afternoon peak departure times typically occur between 2:30 p.m. and 6:00 p.m., avoiding most rush hour drive times.

Local city and county planning doctrine has not supported road widening to address congestion but to rather to further "calm" traffic by reducing traffic lanes, improved signalization and attempts to shift capacity to bus service.

Passengers prefer the economy, flexibility and control the automobile affords them as well as the ease with which they are able to transport baggage. This is expected to continue into the foreseeable future. Convenient, strategically placed park and ride facilities would be needed for some travelers away from main bus routes to consider riding a bus to the airport. Airport passenger growth over the planning horizon is not expected to generate enough demand for local park and ride facilities or for dedicated bus service from outlying areas. Local bus service is expected to continue to grow but remain a small part of the overall ground transportation mix. Local busses are used primarily by student travelers, some international visitors and a minority of airport employees. Nevertheless, GNV should continue to foster accessibility by bus, TNC and alternate modes of ground transportation for airport users.

In order to maximize air service potential, GNV must preserve and continue to provide more convenient automobile access to the airport vs. interstate and expressway travel to competing airports. GNV's major competitors have direct access to the interstate highway system.

Interstate highways around MCO, TPA are considered congested and subject to extended slow down and stoppages, particularly during rush-hour or due to accidents and construction. Increasing capacity on these major roadways is a state priority. JAX offers good highway access from Alachua County. However, travel on I-10 in the vicinity of I-95 and I-295 is very congested at times and subject to accidents and frequent slowdowns. The five-year accident rate in this area is greater than 50 per mile, the highest category measured. Similar conditions exist around Florida's Turnpike, SR 528 and I-4 in the vicinity of MCO as well as I-75 and I-275 in the vicinity of TPA.

There are various bus and shuttle services that do provide ground transportation from Gainesville, the University of Florida, Ocala and other north central Florida locations to MCO, including lower cost options like Megabus and Red Coach. Some of these options offer free-Wi Fi and other amenities.

I-75 through the Gainesville area to the Marion County border and I-75 in southern Marion County are also subject to a high rate of accidents, according to FDOT criteria. The five-year crash rate is greater than 50 per mile. Northwest 39th Avenue serves as a primary connector between I-75 and GNV. The road is designated as the Strategic Intermodal System (SIS) connector for GNV. GNV is designated as an "emerging SIS airport" in the state's Strategic Intermodal System Plan. As stated, 39th Avenue is over 70% capacity for much of its length. 39th Avenue intersects with a number of primary north/south boulevards carrying both local traffic and traffic from arterial roads serving outlying communities. The road is the major access for many residential neighborhoods and commercial businesses. Traffic is also slowed periodically by a school zone approximately 4 miles west of the airport.

Due to its designation as a SIS connector, 39th Avenue may be eligible for priority state funding for road capacity or growth management improvements.

- GNV should work with city officials to try and improve support for road capacity improvements and other measures to improve traffic flow along 39th Ave. and Waldo Rd. and Williston Road.

NW 53rd Avenue is also becoming increasingly important as an east-west connector and traffic delays, particularly during rush hour, are increasing where the two-lane road intersects with primary north/south boulevards.

- GNV should support efforts to improve traffic flow on NW 53rd Avenue.

Future Ground Transportation Developments

If built a proposed expressway across the state from the Jacksonville area to Tampa through Marion County (aka "Coastal Connector") may improve drive times from parts of GNV's service area to MCO, TPA and JAX, particularly from parts of Marion County. This plan has been abandoned for now, due in part to objections from horse farm and property owners in Marion County. Major capacity improvements to the interstate highways between GNV and competing airports may make use of these facilities and access to economy air fares more convenient, if they can keep up with growth. New mass transit alternatives to major cities would also increase competition with GNV. There are no immediate plans for high-speed rail or major mass transit from north-central Florida to Orlando or other major metropolitan areas. GNV should continue to monitor developments in regional mass transit.

Non-Aeronautical Development

- GOAL 1: Support and enhance city efforts to market the remaining lots in the Airport Industrial Park, either for sale or lease.
- GOAL 2: Identify and target potential businesses to achieve the highest and best use for airport properties. Engage commercial brokerage and economic development community to broaden awareness of the available property.
- GOAL 3: Explore planning, zoning and infrastructure improvements to make existing airport properties more marketable.
- GOAL 4: Work with community and economic development stakeholders to foster development of new industrial park and commercial sites on or adjacent to the airport, including the Alachua County Fairgrounds.

Background

Civil airports originally constructed as military airfields often have the benefit of a significant amount of surplus land. Lands were often acquired to accommodate longer than average runways, provide noise and security buffers, and to construct barracks, training, and administrative facilities. Once relinquished, surplus land is often put to productive use as industrial park or for other commercial purposes. Airports with significant surplus land can become a catalyst for economic growth and employment. Additional revenue derived from property sales or leased facilities can help to supplement aeronautical revenues, which can be marginal or unreliable in smaller communities. The overall profit history of the airlines, and particularly many regional airline routes, has been sporadic. Both commercial and general aviation are generally more prone to the immediate effects of recession.

GNV began c.a. 1940 as a Works Project Administration project to construct a modest, civil airfield. With war looming, the construction was soon taken over by the U.S. Army Corps of Engineers for completion as a military training base. The limitations of the original site were evident as large drainage ditches were needed to divert water to drain and expand the site. Pavement core samples suggest that large, uneven amounts of aggregate were needed in some areas to contend with poor soil conditions.

GNV has modest areas of developable land. The airport has identified approximately 142 acres of developable land outside of the existing industrial park. There are approximately 29 acres of unsold land within the industrial park. Much of this land was affected by migration of nearby ground water contamination from a parcel previously owned by Sperry Corp. (now occupied by the U.S. Job Corps). Mitigation efforts have been completed however monitoring wells have been placed for continued reevaluation. An indemnification by the City for past contamination must be provided with the sale.

The current zoning of non-aeronautical land is considered favorable. GNV has been successful in adding numerous allowable uses (SIC codes) to land zoned within the Airport Facility (AF) District. Other land, i.e. acreage near Waldo Rd. along the new access road, has been rezoned from Conservation to Business Industrial (BI). It is believed the existing zoning will accommodate GACRAAs previously stated goals for the property and most any opportunity that would reasonably arise.

GNV has constructed a new west side access road from Waldo Road with desire to foster development on approximately 34 acres of adjacent land. The road could provide a second access to accommodate business expansion into the adjacent Fairgrounds property. GNV is currently installing an 8-inch waterline along the access road to serve commercial terminal expansion and foster development along the road. Road turnouts for future developments have already been established. There is no sewer service along the roadway. The nearest sewer connection is located some distance to the south at the corner of 39th Ave and Waldo Rd. and may require the installation of a lift station.

- GNV should explore additional, advance planning or infrastructure improvements, including sewer infrastructure, along the west access from Waldo Road, when resources permit.

Commercial Development Opportunities

GNV's consultants conducted a study of non-aeronautical property development opportunities in 2013 as part of a periodic Master Plan Update. GNV has been interested in diversifying its revenue opportunities to better cope with potential disruptions in aeronautical revenues. The Consultant was tasked with identifying market opportunities. The consultant looked at existing commercial and industrial uses around the airport. An inventory of vacant land and facilities, both on airport and in the vicinity, was taken and assessment of prevailing market rates for space were completed. An examination of the broader region was made, including demographic trends, available economic development incentives, traffic counts on area roadways, etc. This study was conducted at a time when the local real estate market was still recovering from the effects of the 2008 recession and local vacancy rates were at historically high levels* (C&S Companies Report, 2013*).

The Consultants identified the following uses as having the best opportunity for economic success:

1. Dedicated Storage Facilities (self-storage, recreational vehicles, watercraft)
2. Solar Power Generation (considered compatible with airport operations)
3. Light Industrial

As GNV's amount of developable land can be considered marginal, GACRAA's goal has been to nurture opportunities for high quality office, research, manufacturing or other uses that provide quality employment and increase demand for air travel. Commercial uses that are of value to air travelers are also desired, such as a hotel, restaurant, gas station, pet boarding facility, etc. GACRAA has considered these the "highest and best use" of non-aeronautical lands and would prefer to lease lands for long-term revenue potential vs. selling property outright. This strategy appears less attractive to developers in the current market climate. While economic conditions have improved since 2013 and vacancies are reduced, little new construction has occurred in the vicinity of GNV and the study conclusions appear to remain valid.

Storage and Distribution

Aging of leasable storage product in the GNV area and a favorable “inventory per capita” has been identified by the consultant as indicating justification for storage facility on GNV property. A 30,000-40,000 s.f. self-storage facility was recommended. Storage has not been considered by GNV as the highest use for airport property along Waldo Road, as recommended by the consultant due to road visibility. New storage units in the vicinity of 53rd Ave. and Waldo Rd. were constructed several years ago by private interests.

GNV and the City of Gainesville have had past success in locating moderate sized storage and distribution facilities in the Airport Industrial Park, including Nordstrom’s, Florida Food Group, Performance Food Group and others. GNV recently leased one area that the airport might consider favorable for both self-storage and RV and Boat storage to Amazon for temporary operation of a Pop-up Distribution Center. Also, 8.5 acres in the Airport Industrial Park was sold to FedEx in early 2019 for relocation and expansion of its existing package delivery facility.

- Given the limited land available with street visibility and the lower potential employment and gross wages generated per acre by self-storage or warehousing, GNV should consider soliciting for storage only in the outlying parcels in the north east quadrant of the airport.

Solar Power Generation

GNV identified some limited areas on and adjacent to the airfield where solar power generation may be appropriate. An RFP for solar power development on vacant lands was published in 2009. In the end, the revenue potential was considered too low to lease for non-owned, solar power generation. GNV cannot benefit from the tax advantages granted to for-profit companies engaged in solar power generation. The drop in traditional energy sources like oil and natural gas has affected the demand for solar power.

- GNV should continue to monitor opportunities for solar power as solar technology, energy prices and regulations affecting demand for renewables may change.

Light Industrial

GNV has zoning in place to accommodate this use, which is seen as highly desirable and compatible with airport operations. Such businesses are potentially high users of airport services.

GNV should continue to be engaged with economic development stakeholders to be aware of potential leads. These include agents of the City and Alachua County as well as the Gainesville Chamber and its Council for Economic Outreach, Enterprise Florida and others.

GNV should explore additional, advance planning and infrastructure improvements, like basic sewer service, along the west access from Waldo Road as resources permit.

Commercial/Retail

Commercial retail establishments with visibility along Waldo Road are considered desirable if they enhance the airport experience. Optimal traffic counts to support businesses like restaurants are considered by the consultant to be 20,000 cars per day or greater. Current traffic counts along Waldo Road near the airport entrance are estimated at 17,100 cars per day.

The Consultants did not find acceptable market potential for a hotel on the airport in 2013.

In late 2016, as market conditions continued to improve, GNV hired CBRE Inc. to conduct an evaluation of the feasibility for a 120-unit hotel. A stabilized occupancy rate of 54% at an average daily room rate of \$122 was forecast. This is well below needed performance. The study indicated that there were already too many hotel beds under construction in the Gainesville area and that outside of busy event seasons, peer hotel occupancy rates were already low (77% average). The airport does not generate enough demand to support a hotel on its own and the consultant noted the lack of sufficient nearby trade to generate demand. There are no other hotels in the vicinity. CBRE recommended that the airport revisit a hotel once Santa Fe College had completed its law enforcement training simulator across from GNV (now operational) and Alachua County had made a decision on a location for its proposed event center. The future of the event center is still undetermined. The lack of commercial trade on the east side of Gainesville and the lack of a hotel is also seen as a negative for supporting and complimenting an event center.

GNV was approached by an experienced airport hotel developer interested in pursuing a project. The airport published a public RFP based on his interest. No submissions were received. Despite positive indications throughout the RFP process, the developer cited concerns over market demand.

Education and Training Facilities

The Consultants did not find particular market potential for educational/training facilities on the airport in 2013. It was believed that educational facilities associated with the University of Florida would continue to consolidate near the main campus and the Innovation Hub by and large, and that large area research facilities would be located on other land that is owned by the University. Despite overtures made by GNV, UF aeronautics programs do not have a hands-on aviation component that requires airport access. GNV has continued to pursue larger scale flight training opportunities.

Future Land Opportunities

While some of the property surrounding the airport has development challenges due to flood plain, wetlands or environmental constraints, there are parcels that could be partially developed as industrial or commerce park. Such use would be compatible with airport operations from a noise perspective. Some businesses will find it attractive to be so close to airline and general aviation access. Several such properties were identified in the 2015 Master Plan Update. These include under-utilized properties adjacent to the airport along SR222 owned by the State of Florida as well as the Alachua County Fairgrounds. Additional land areas of interest include lands owned by East Gainesville Development Partners surrounding the Ironwood Golf Course and lands owned by Rayonier Atlantic Timber Company north-east of the airport.

GNV should discuss partnerships with local governments and economic development agencies to encourage non-residential development of some of these sites. Joint activities could include targeted zoning and regulatory changes, property and sales tax incentives, property acquisition and infrastructure development, and perhaps formation of an Industrial Authority to take advantage of tax-exempt financing opportunities. Job creation in this area could spur other commercial activity, which is highly coveted in East Gainesville.

- GNV must remain vigilant in protecting zoning around the airport to ensure compatible land uses, control obstructions and discourages residential development in noise sensitive areas.
- GNV should explore targeted land acquisitions which:

1. Protects airport operations
2. Provides for airport expansion
3. Diversifies airport revenues
4. Fosters general economic development

Properties identified for possible acquisition have been identified in the Airport Master Plan. Land acquired to better control obstructions can often be sold for compatible developments while retaining aviation easements or portions within the Runway Protection Zone.

DRAFT

GAINESVILLE REGIONAL AIRPORT

Strategic Plan - Exhibits

May 2019

The “Planning Funnel”

Up to Twenty Years (*with annual update/review*)
STRATEGIC PROGRAMS

20 Years
FAA MASTER PLAN

5-10 Years
CAPITAL IMPROVEMENT PLAN

5 Years
TACTICAL BUSINESS PLAN &
FINANCIAL PLAN

1-2 Years
Business Plan and Budget

Interrelationships of the Airport Planning Process



Sixel Consulting Group, Inc.

GAINESVILLE REGIONAL AIRPORT Air Service Development Strategic Plan



Prepared by:
Sixel Consulting Group, Inc.
407 Oakway Road, Suite 220

GAINESVILLE REGIONAL AIRPORT

TERMINAL CONCEPTUAL DEVELOPMENT PLAN

Gainesville Regional Airport
Gainesville, Florida

Work Order No. 6
RS&H Project No. 201-3363-106



October 25, 2013



Master Plan - Volume

GAINESVILLE REGIONAL AIRPORT

Prepared for:
Gainesville-Alachua County Regional Airport Authority

RSH No. 201-3363-001

FINAL REPORT

Prepared by:



Reynolds, Smith and Hills, Inc.
Birkitt Environmental Services, Inc.
Southeastern Archaeological Research, Inc.

Gainesville Regional Airport Gainesville, Florida

Twelve Months Ended September 2015

April 2016

2016 Dates Included in This Study Shown Below - Gainesville Area



Summary

- The Gainesville study area averaged 2,060 FDEW (passengers per day each way) from Oct. 2014 through Sep. 2015, with 27.2% of those passengers using GNV.
- 32,541 study tickets were combined with US DOT Origin-Destination surveys covering the time period from Oct. 2014 through Sep. 2015.
- Orlando International Airport captured 675 domestic and international FDEW (passengers per day each way) from the Gainesville study area.
- New York / Newark, Washington / Baltimore and Chicago generated the largest number of passengers from the Gainesville study area.
- Delta, American and Southwest capture the largest number of passengers among airlines providing service to Gainesville study area passengers.

True Market / Leakage Study



ALP UPDATE STUDY NARRATIVE REPORT

Prepared For
GAINESVILLE REGIONAL AIRPORT

14 May 2014
Version 1.0



DRAFT

GAINESVILLE REGIONAL AIRPORT

TERMINAL PLANNING WHITE PAPER 2015

JUNE, 2015



ENG, DENMAN & ASSOCIATES, INC.
ENGINEERS • SURVEYORS • PLANNERS

GAINESVILLE REGIONAL AIRPORT MASTER PLAN REPORT



Prepared For:

Gainesville-Alachua County Regional Airport Authority

Billy Brashear
William R. Breeze
Ron Ewers
Ian Fletcher
Mark Goldstein
Winfred M. Phillips, Chair
Kinnon Thomas, Vice-Chair
Janet Woods, Secretary/Treasurer
Allan Penksa, Chief Executive Officer

Prepared By:

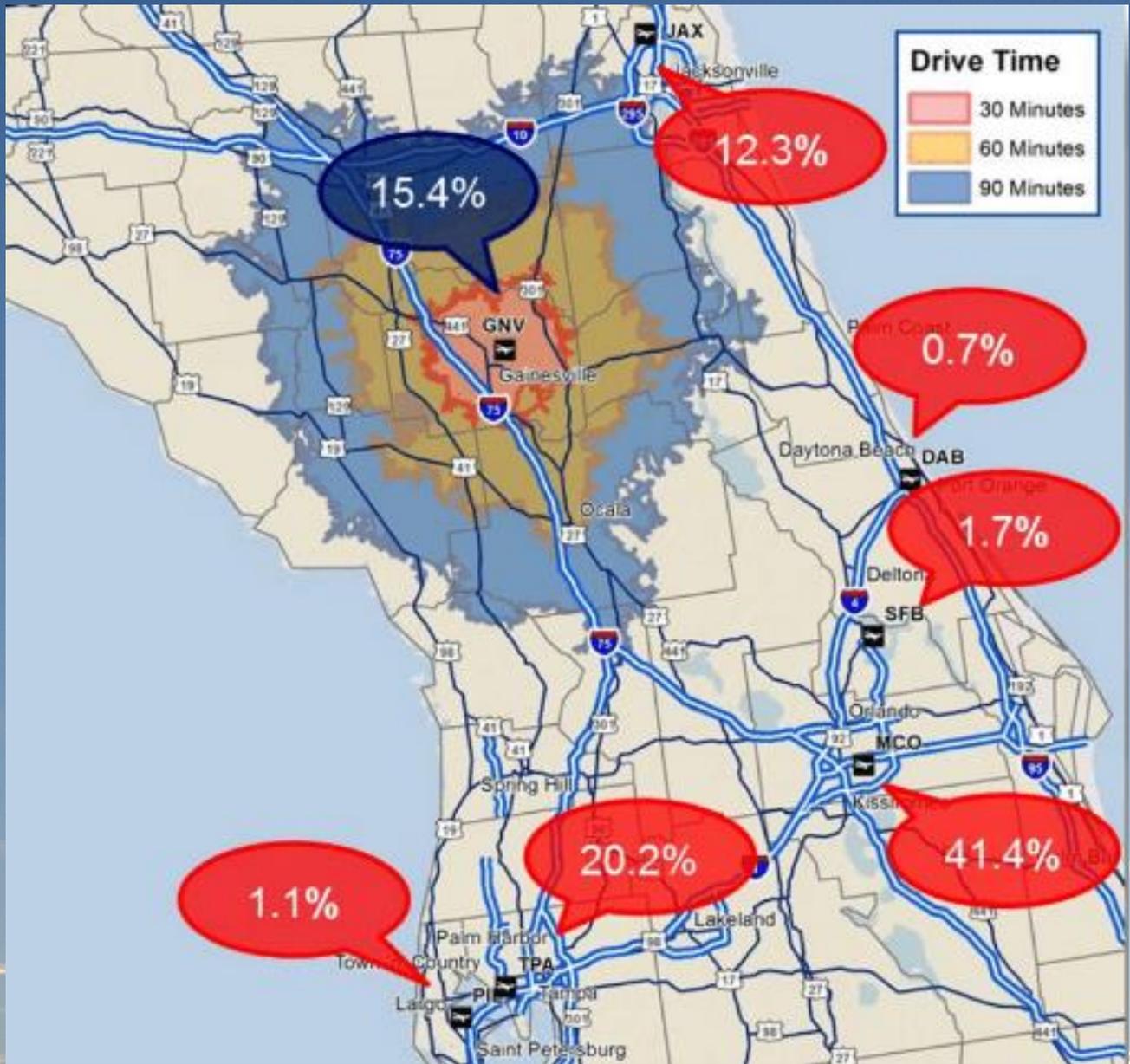
Eng, Denman & Associates, Inc.

Date:

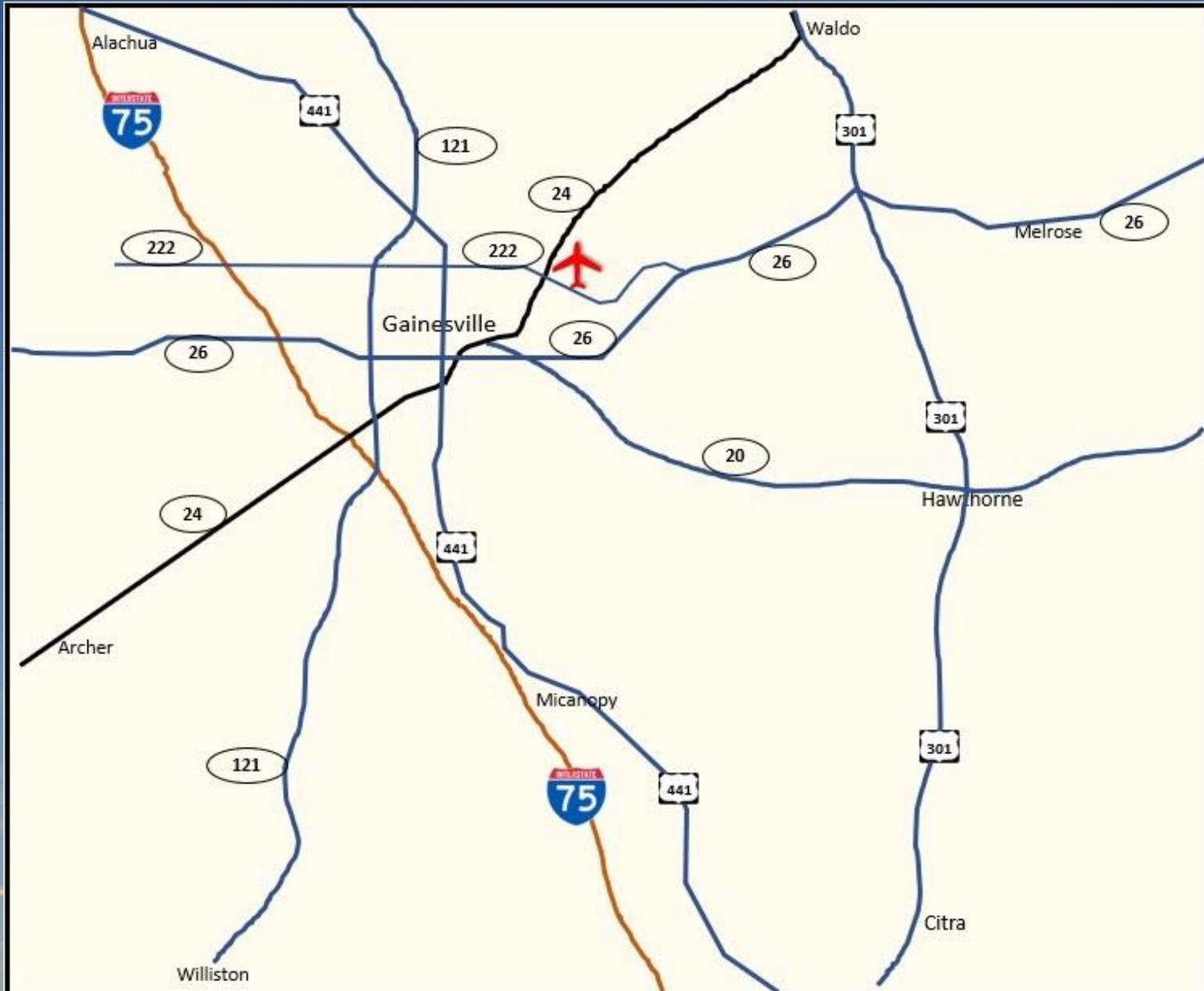
June 17, 2010

GNV Catchment Area and Competing Airports

Origin
Catchment
Area Leakage
Study for the
Year ended
June 2018

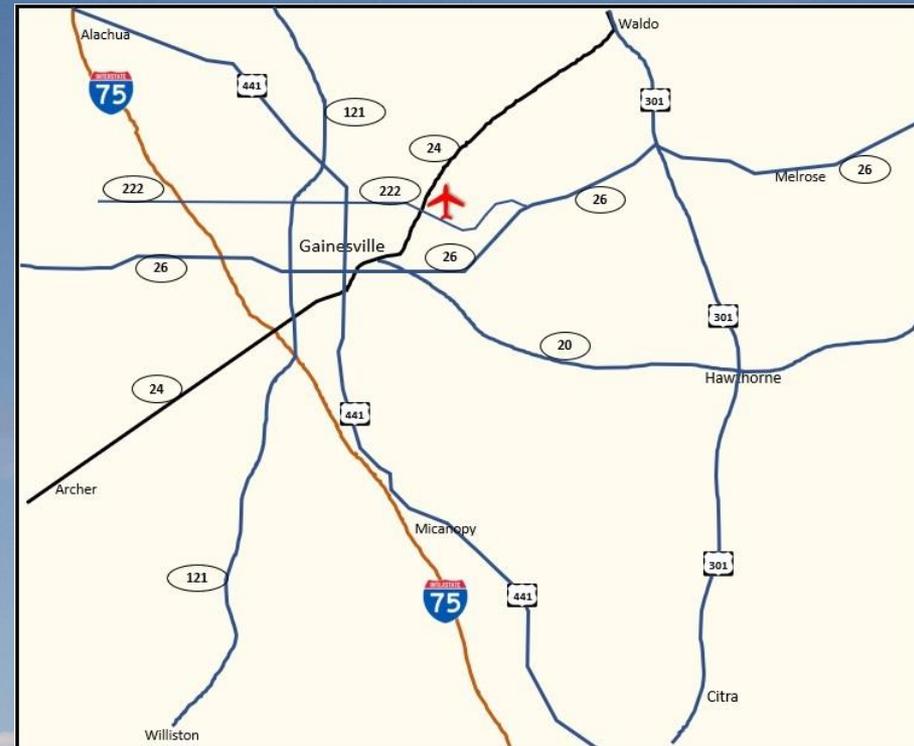


Major Roadways Serving GNV



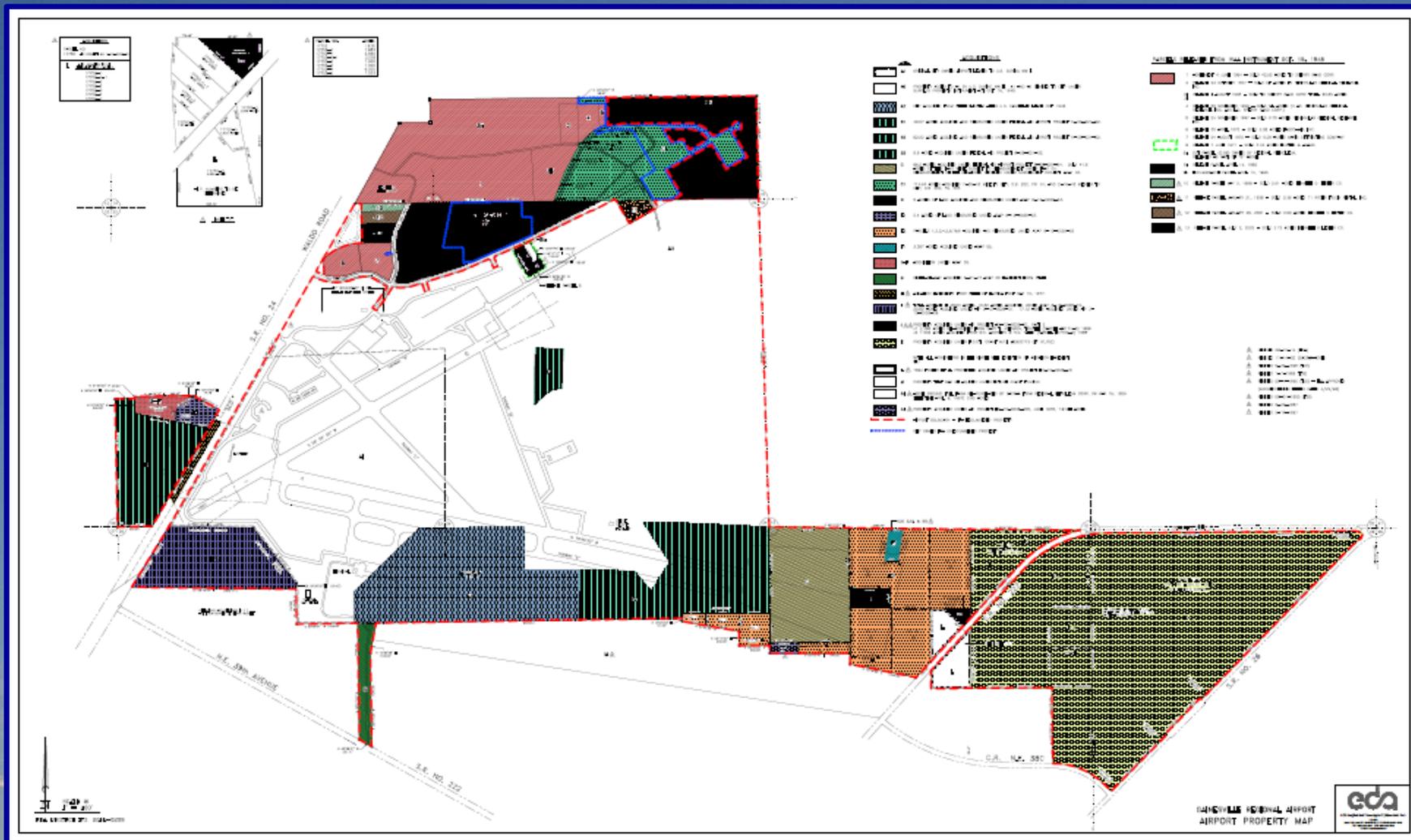
Major Roadways Serving GNV and Percent Capacity

- SR24 (NE Waldo Road) just north of 39th Avenue is at **48%** of capacity and provides a Class C level of service.
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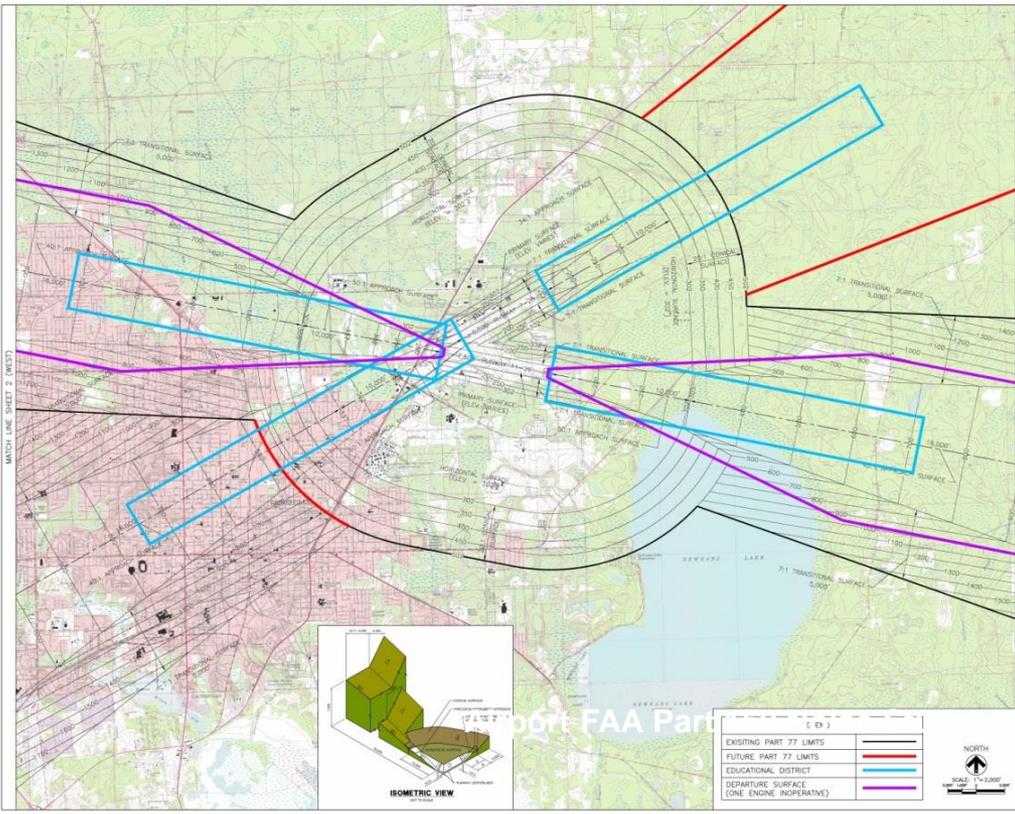
Airport Property Map

FAA Exhibit A - Airport Encumbered Lands



Local Land Use Goals

- Ensure Compatible Land Uses into the Future (Noise, etc.)
- Protect Airspace from Future Obstructions (FAR Part 77)
- Maximize/Preserve Authorized Land Uses in AF and BI Districts
- Purchase Land for Future Runway Expansion
- Purchase Land as prudent for Non-Aeronautical Dev.
- Explore Master Storm Water Drainage Plan



RSH
 Architectural, Engineering, Planning
 and Environmental Services
 Reynolds, Smith and Hills, Inc.
 1714 Peachtree Park Blvd., Suite 500
 Atlanta, Georgia, 30329
 404.261.0000 Fax 404.261.0001
 www.rsh.com
 FLORIDA LICENSE NUMBER 00000000

GAINEVILLE REGIONAL AIRPORT

GAINEVILLE REGIONAL AIRPORT

AIRPORT MASTER PLAN UPDATE

CONSULTANTS

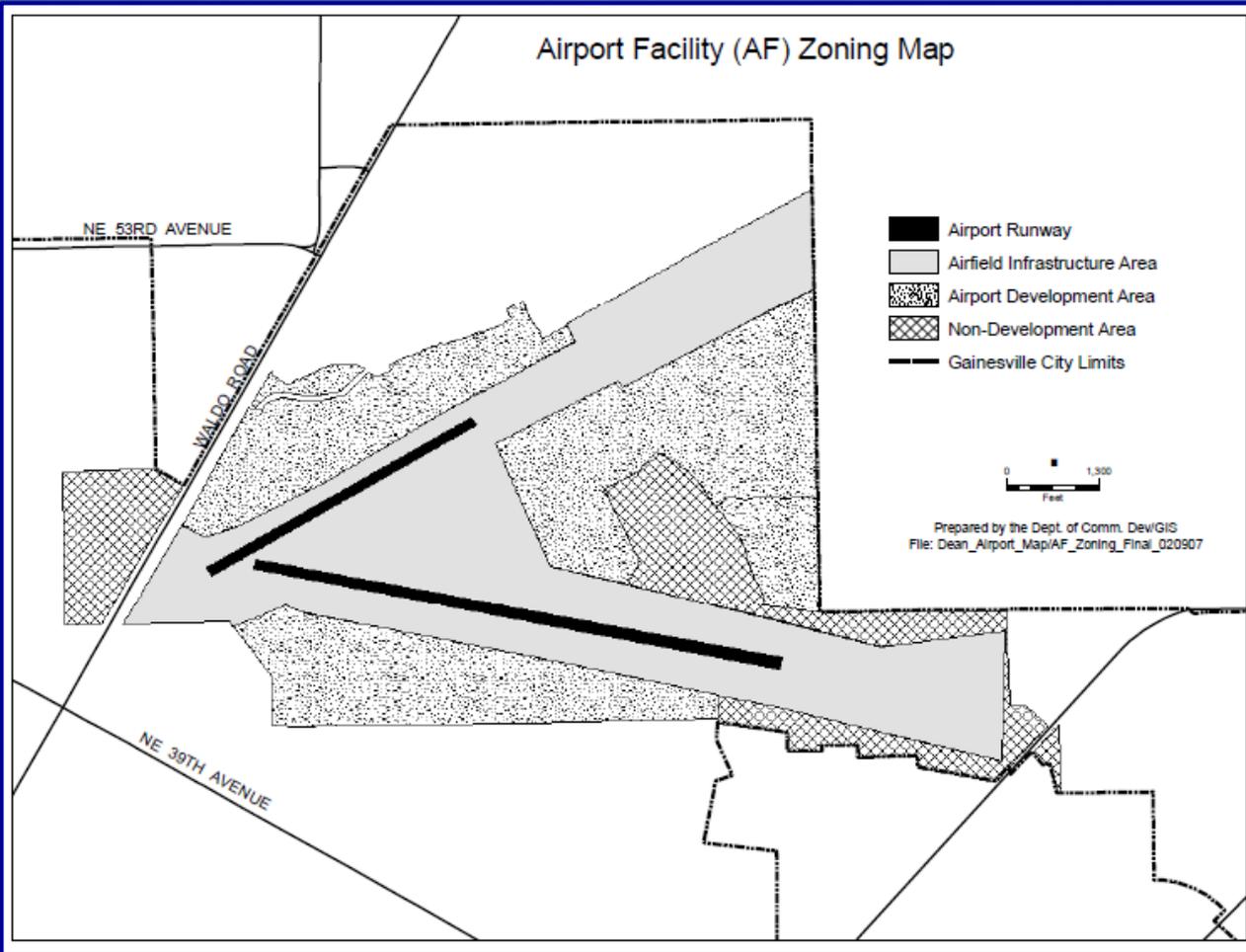
- Update FAR Part 150 Noise Map as Aircraft Operations Change



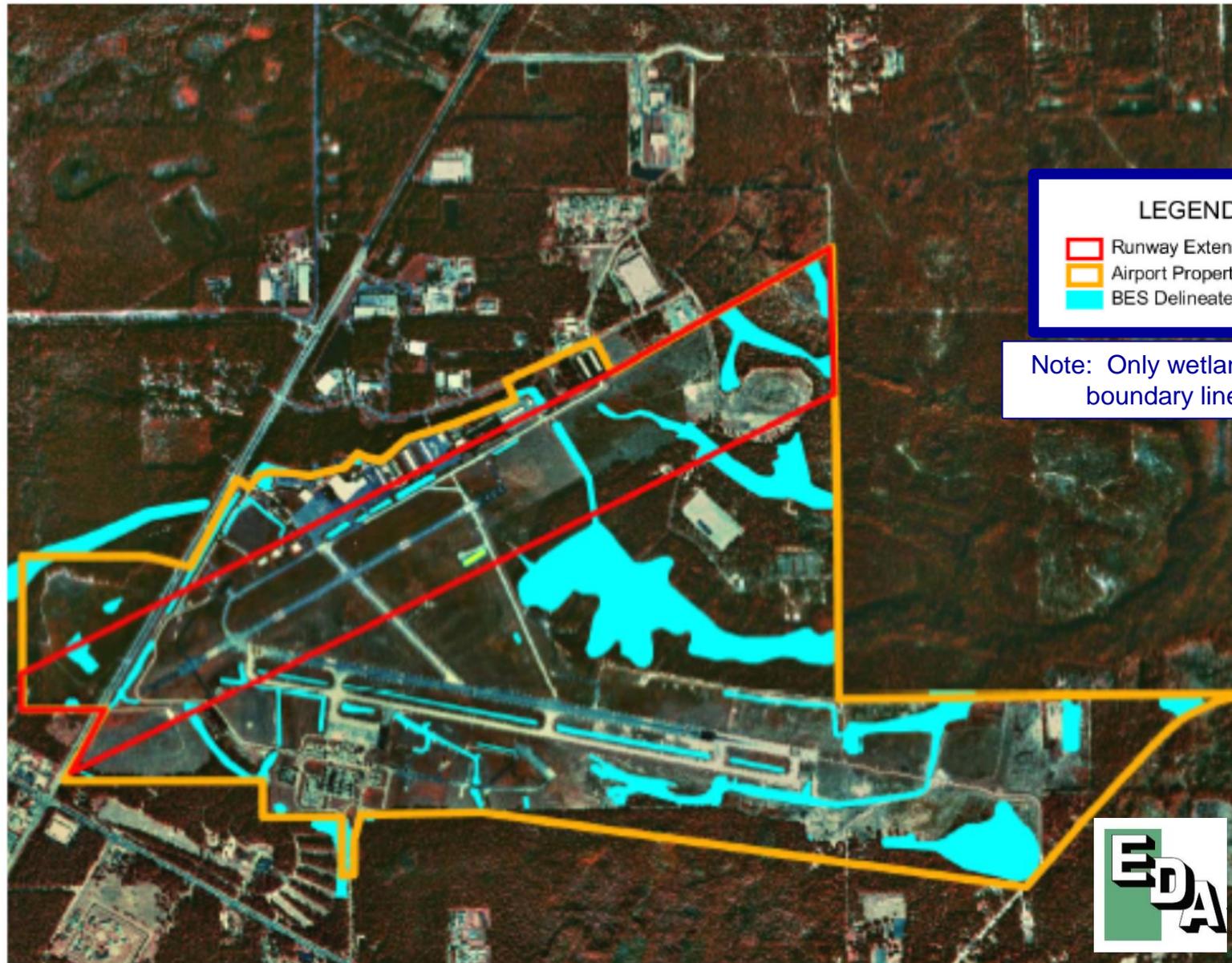
Permitted Uses in Airport Facility Zone

Major Uses Permitted by Right

- Transportation by Air
- Aircraft and parts
- Transportation services
- Petroleum Products Wholesalers
- Eating and drinking places
- Hotels and motels
- Pet boarding
- Public golf courses
- Automotive repair shops
- Automotive rental and leasing
- Misc. manufacturing industries
- Corporate offices
- Engineering
- Business services, real estate
- Health services
- Vocational Schools
- Petroleum Products Wholesalers



GNV Wetlands



LEGEND

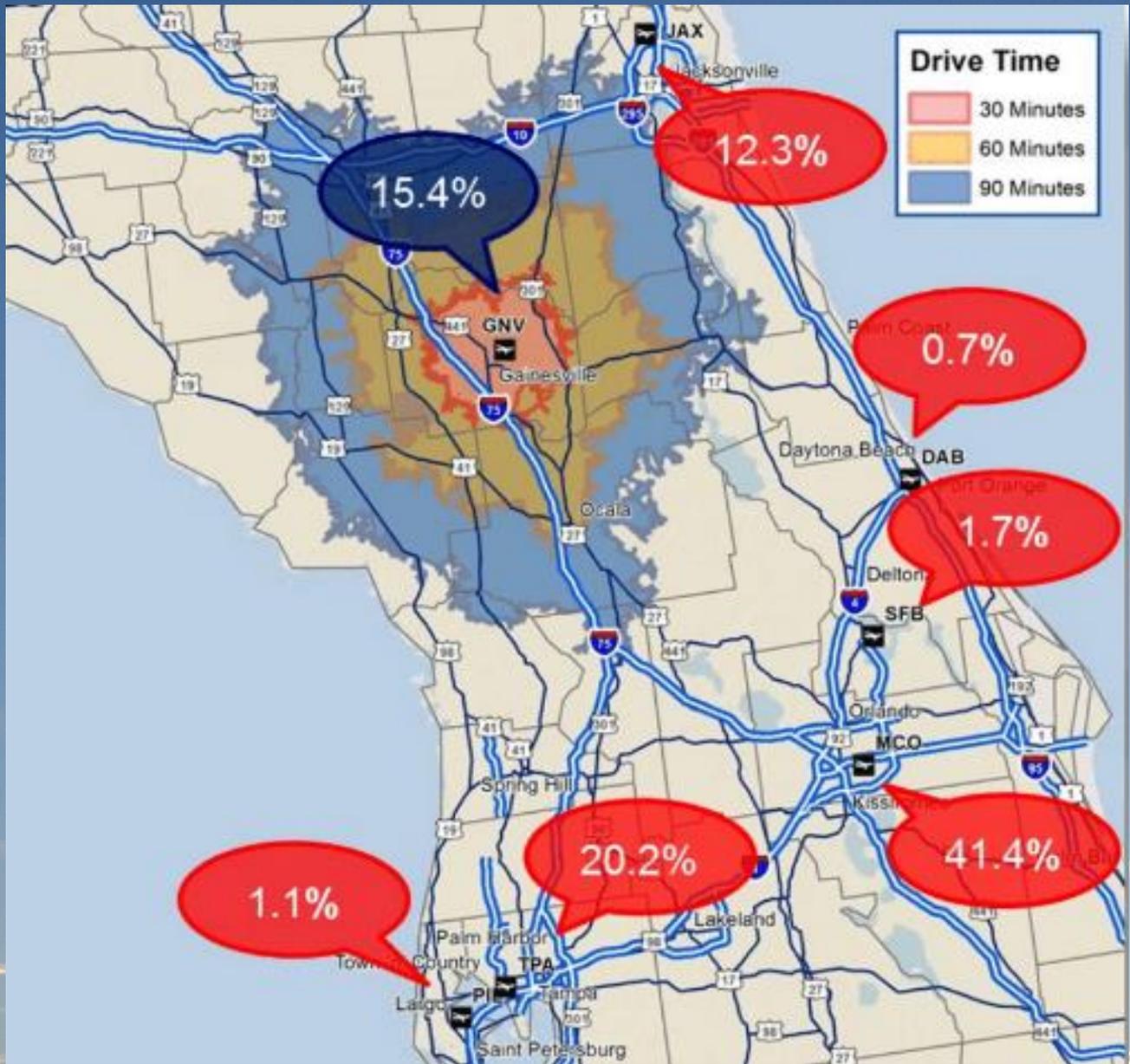
-  Runway Extension Project Limits
-  Airport Property Boundary
-  BES Delineated Wetlands

Note: Only wetlands within airport boundary line are shown



GNV Catchment Area and Competing Airports

Origin
Catchment
Area Leakage
Study for the
Year ended
June 2018



Terminal Expansion - Baggage Screening and Make-up Area



Orlando International Airport - Catchment Area



Orlando International Airport – Market Area

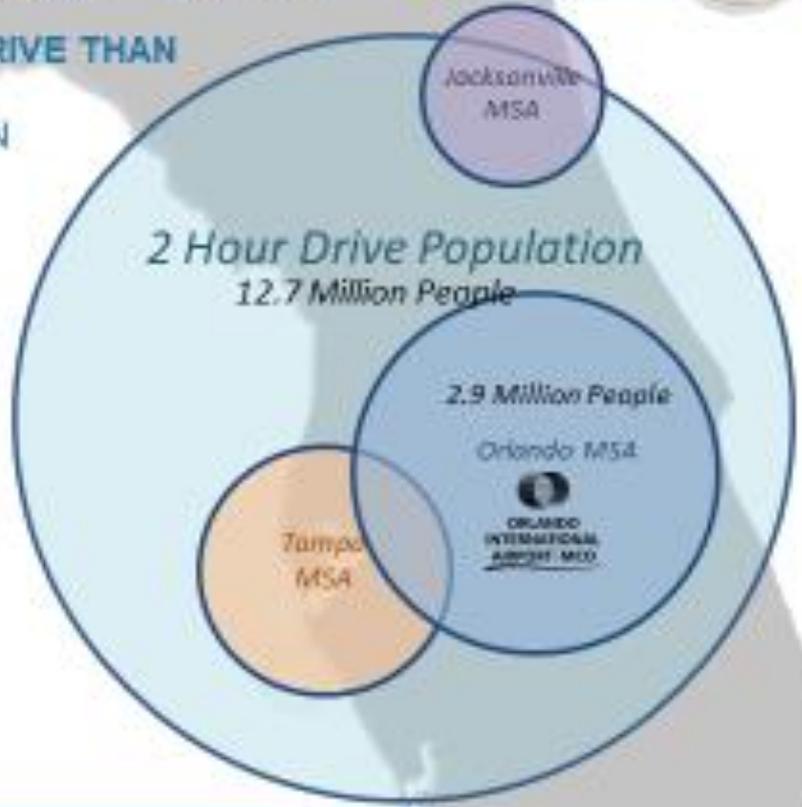


MCO HAS A LARGER POPULATION WITHIN A 2 HOUR DRIVE THAN ANY OTHER FLORIDA AIRPORT
12.7 MILLION PEOPLE > 60% OF FLORIDA'S POPULATION

MCO	2-hr Population	Metro Area
Total Population	12,658,874	2,918,701
Average Household Income	\$48,451	\$49,875

MIA	2-hr Population	Metro Area
Total Population	8,259,206	4,639,520
Average Household Income	\$50,520	\$50,112

TPA	2-hr Population	Metro Area
Total Population	10,995,181	5,617,441
Average Household Income	\$47,794	\$49,057



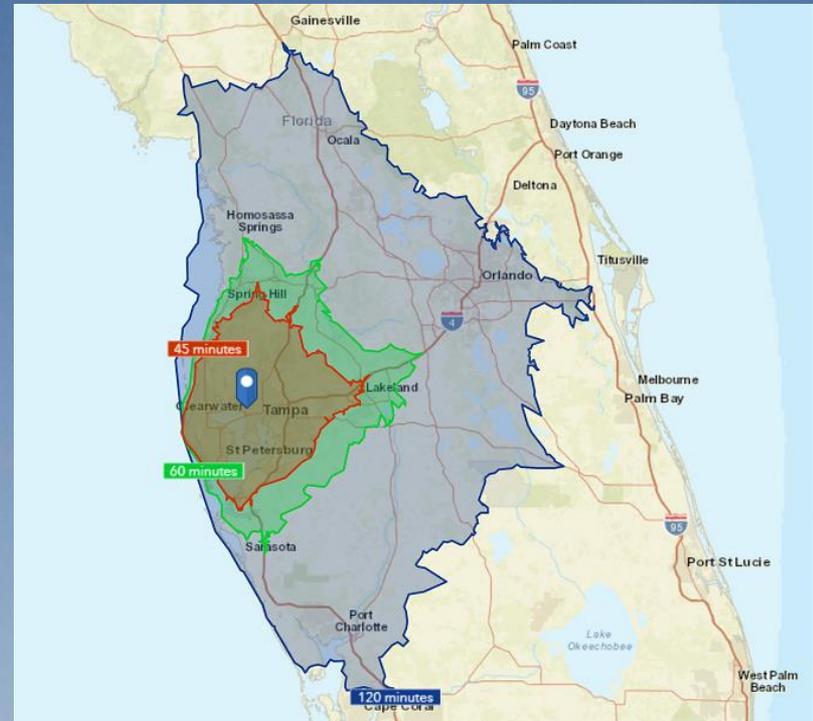
Tampa International Airport – Drive Time

3.7-m people live within an hour of TPA – will be 4.0-m by 2023

- Three of nation's 25 fastest growing metros within an hour drive of TPA
 - North Port/Sarasota (#13)
 - Lakeland-Winter Haven (#14)
 - Tampa-St. Petersburg (#23)

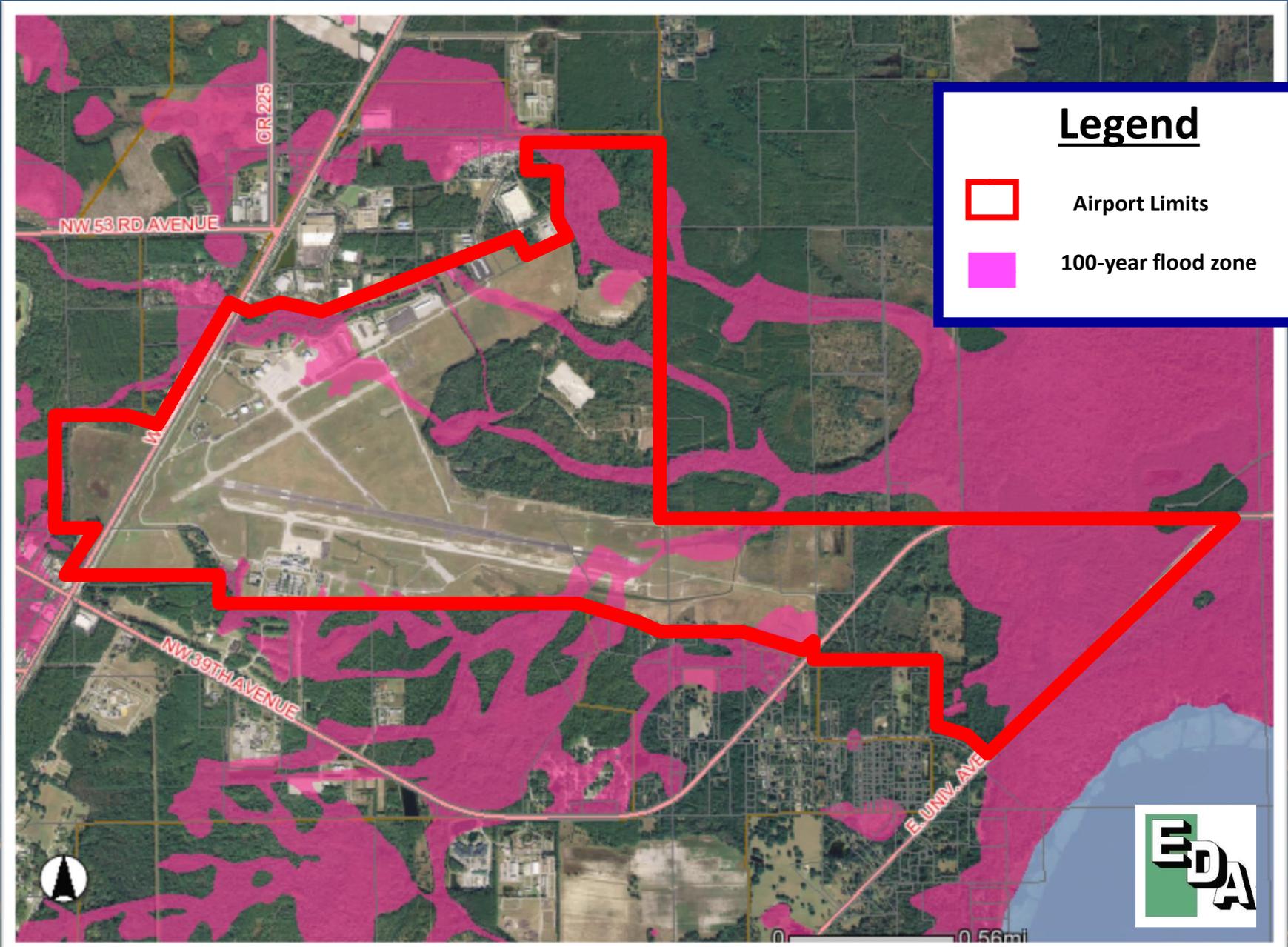
Regional Drive-Time Population Totals

	2010	2018	2023
0:45 Drive	2,515,006	2,812,861	3,019,898
1:00 Drive	3,315,930	3,703,596	3,983,818
2:00 Drive	6,922,315	7,845,217	8,526,049

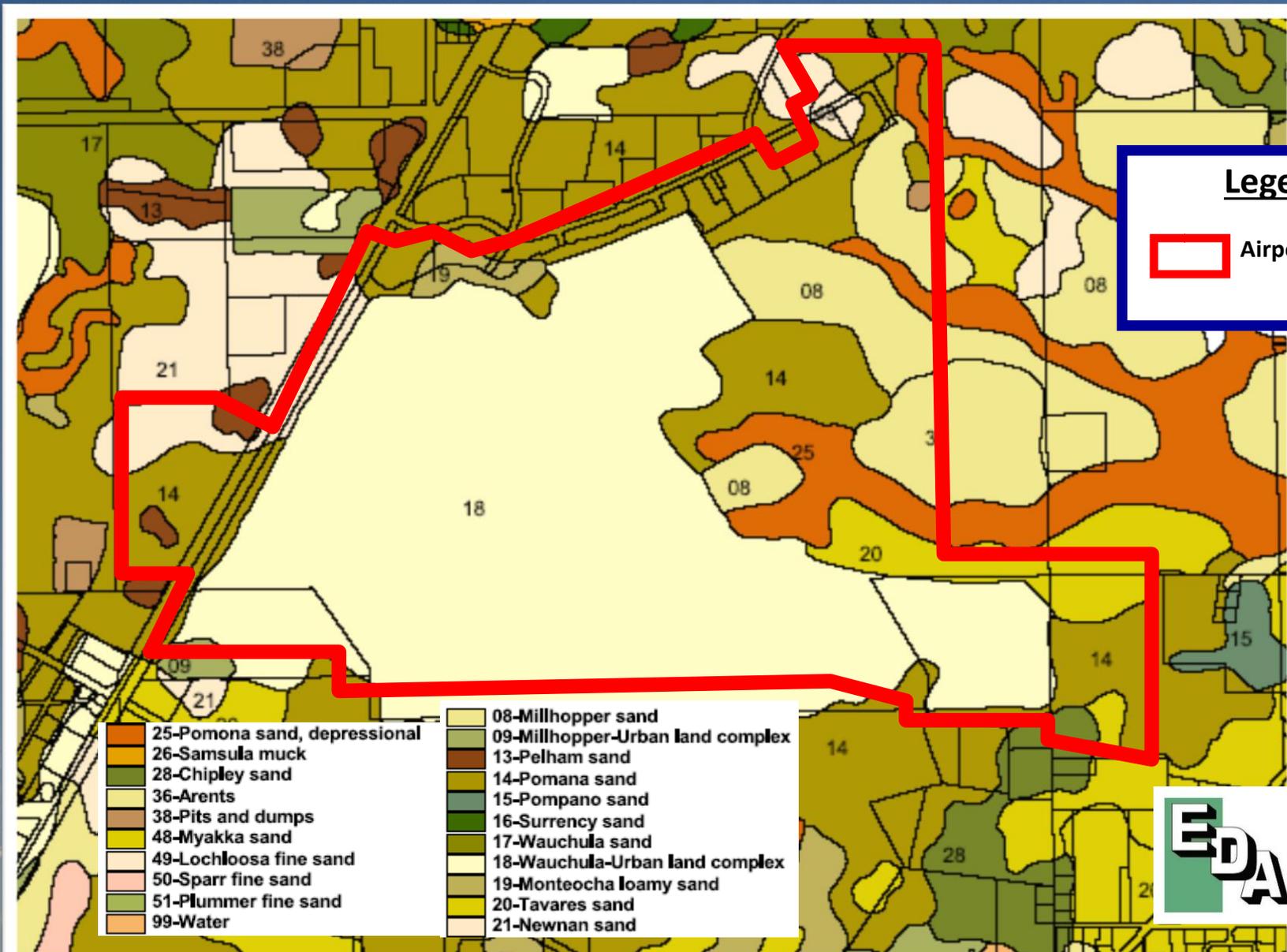


Source: Bloomberg & Tampa Bay Regional Competitiveness Report

100 Year Flood Zone



Area Soil Conditions

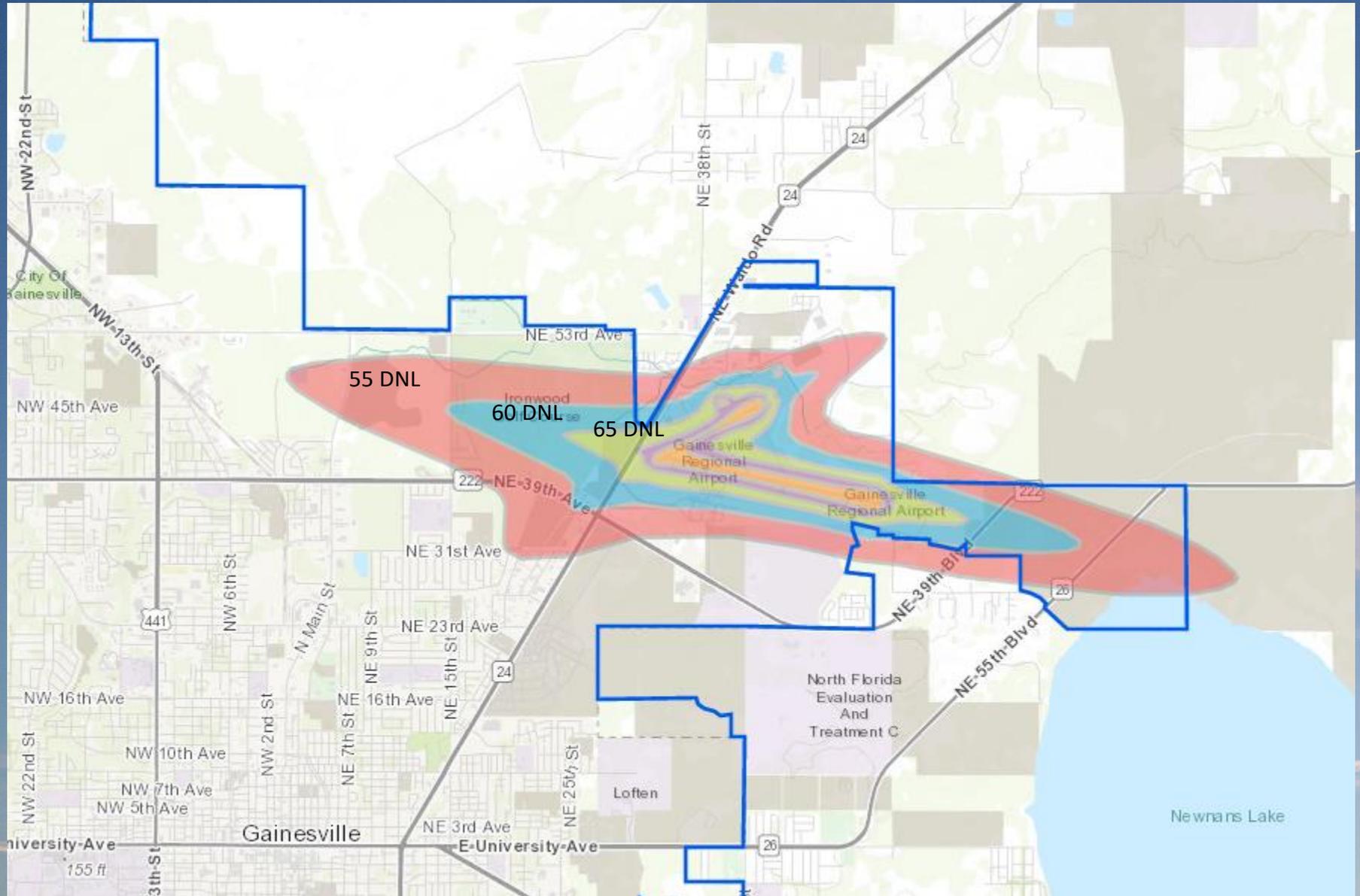


Legend

 Airport Limits

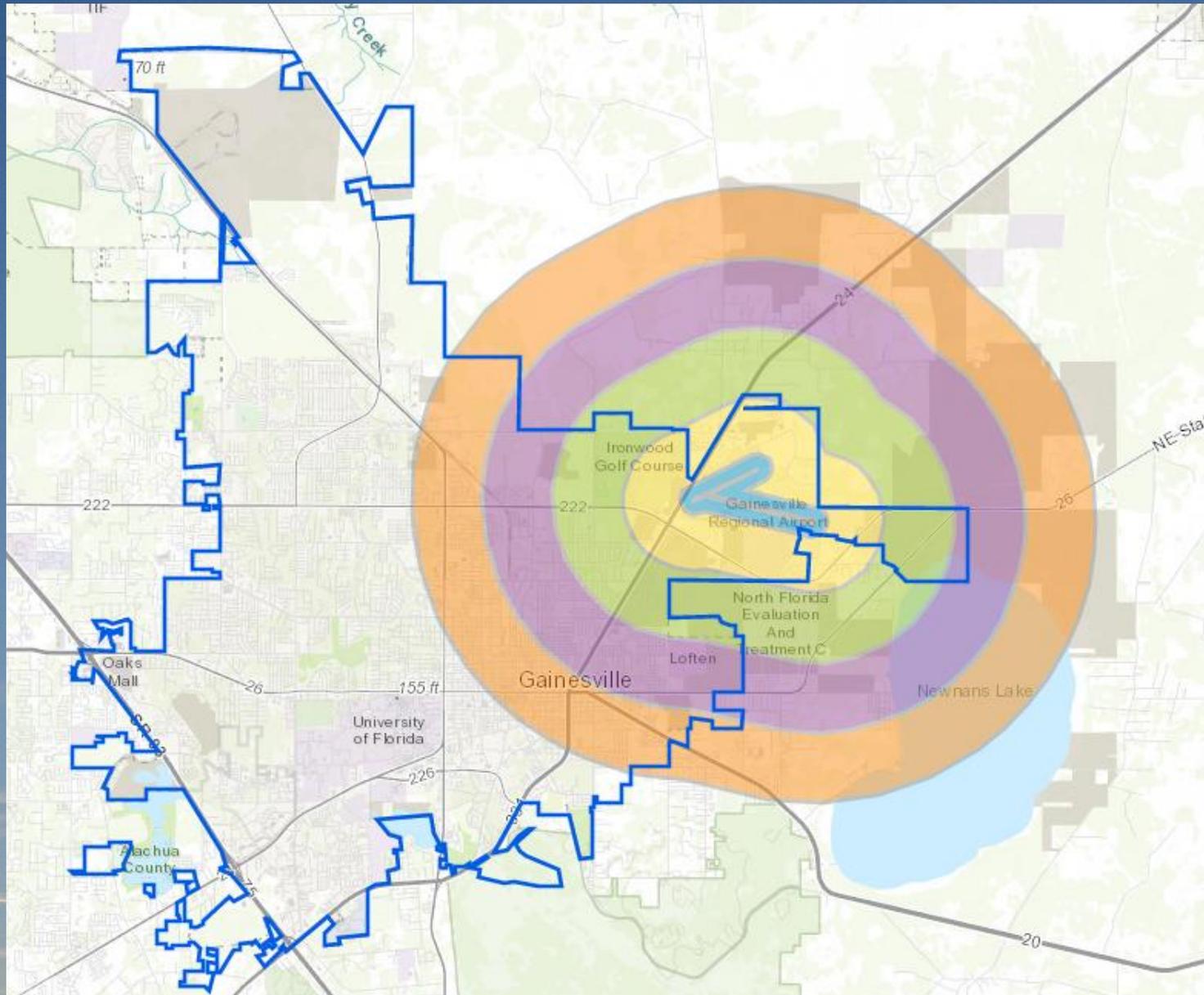


City of Gainesville - Airport Noise Zones



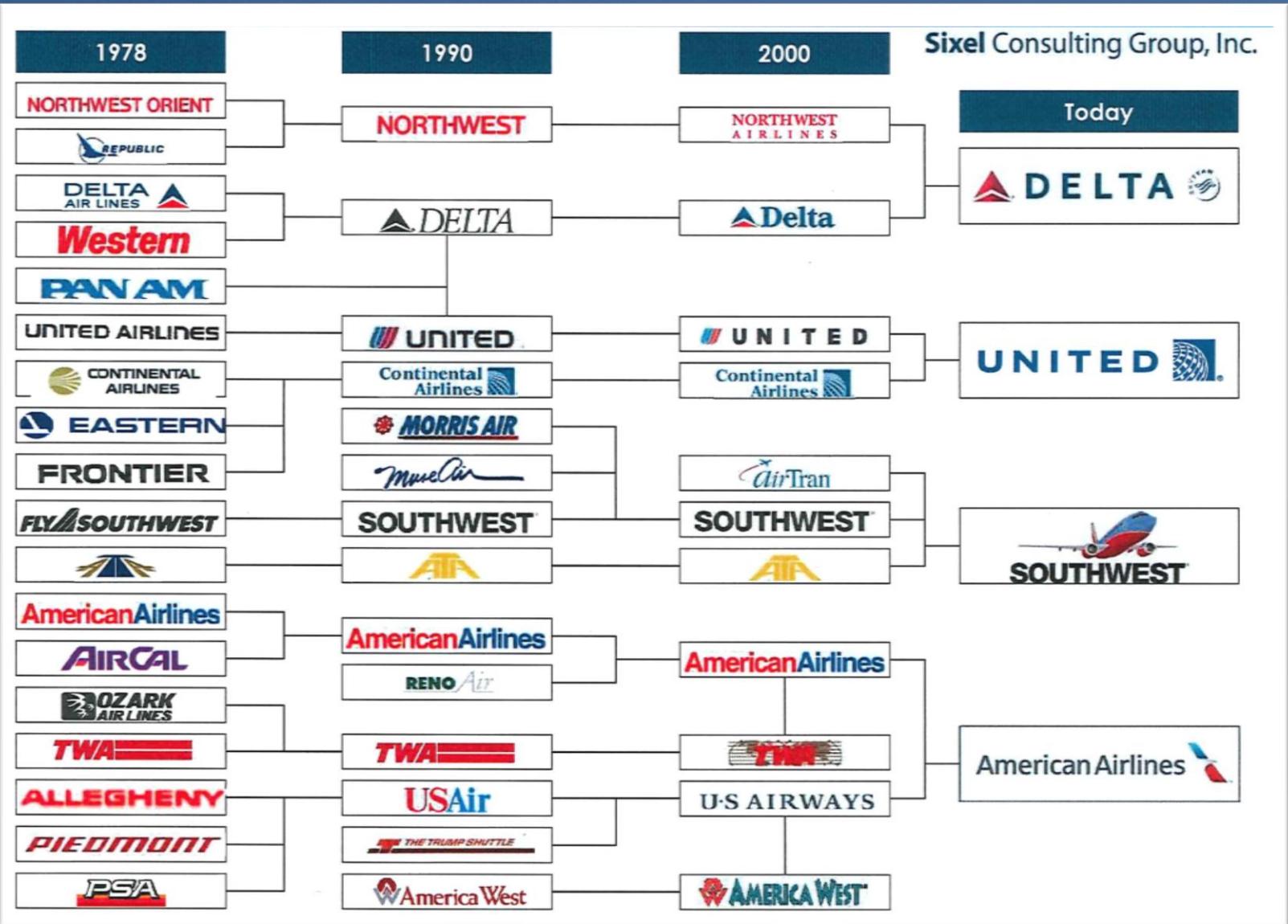
*No residential except for "infill" of existing allowed within 60 DNL Zone

Airport Proximity Height Notification/Restriction Surfaces

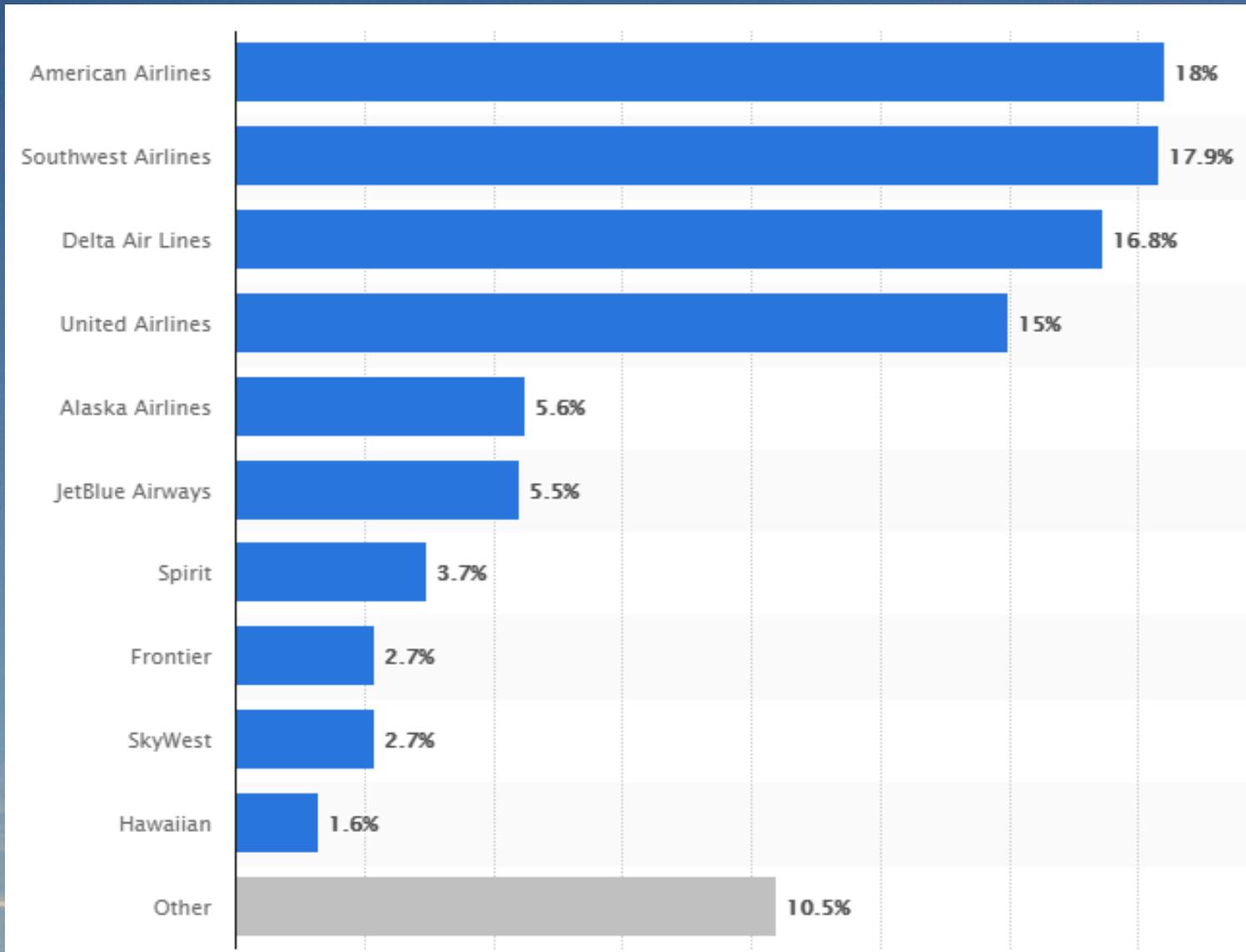


Airline Industry Consolidation

In 2016, the remaining "Big Four" Had Approx. 86% of All U.S. Seat Capacity



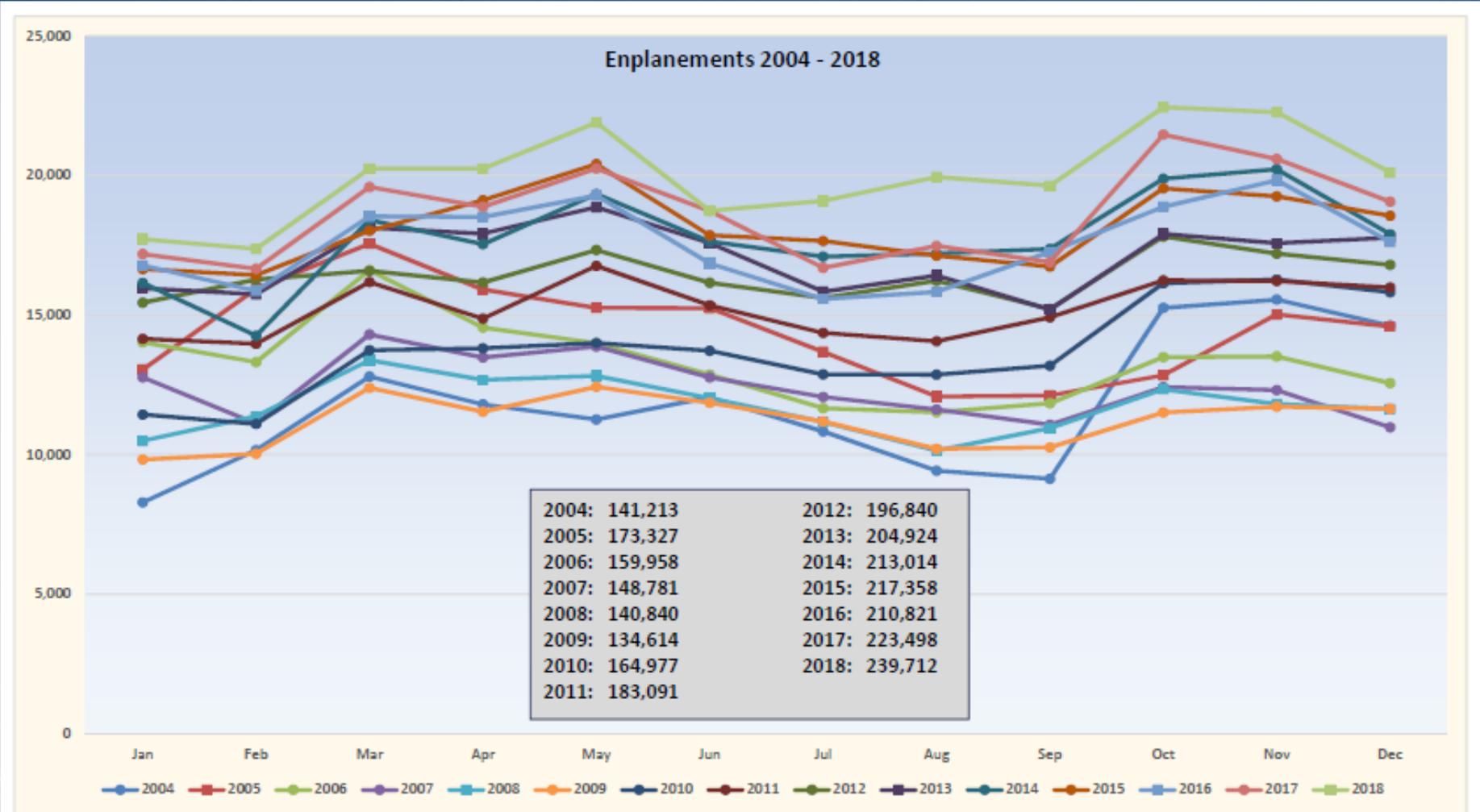
2018 U.S. Airline Domestic Market Share (April-March)



Source: U.S. Bureau of Transportation Statistics

Gainesville Regional Airport

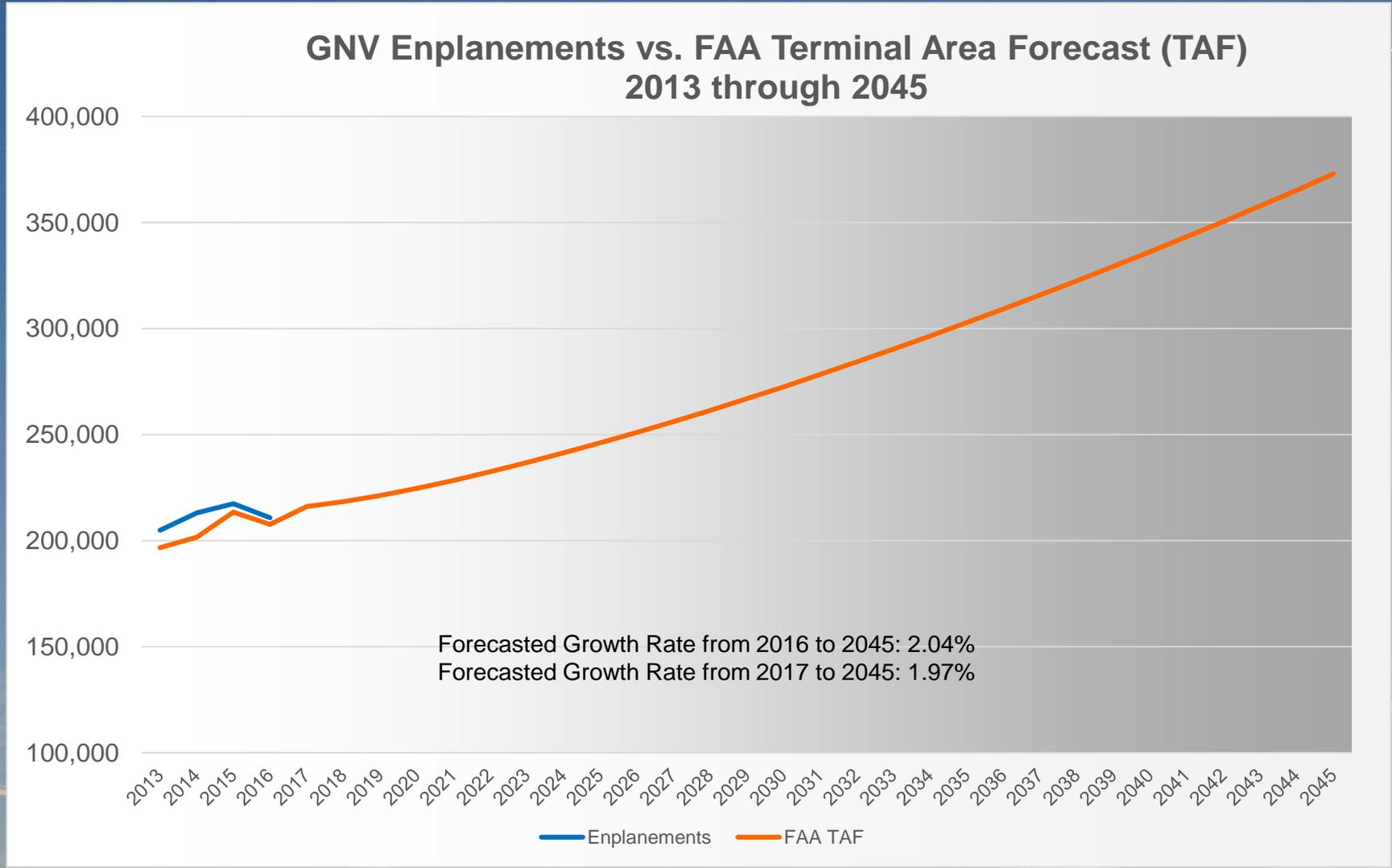
Enplanements 2004 - 2018



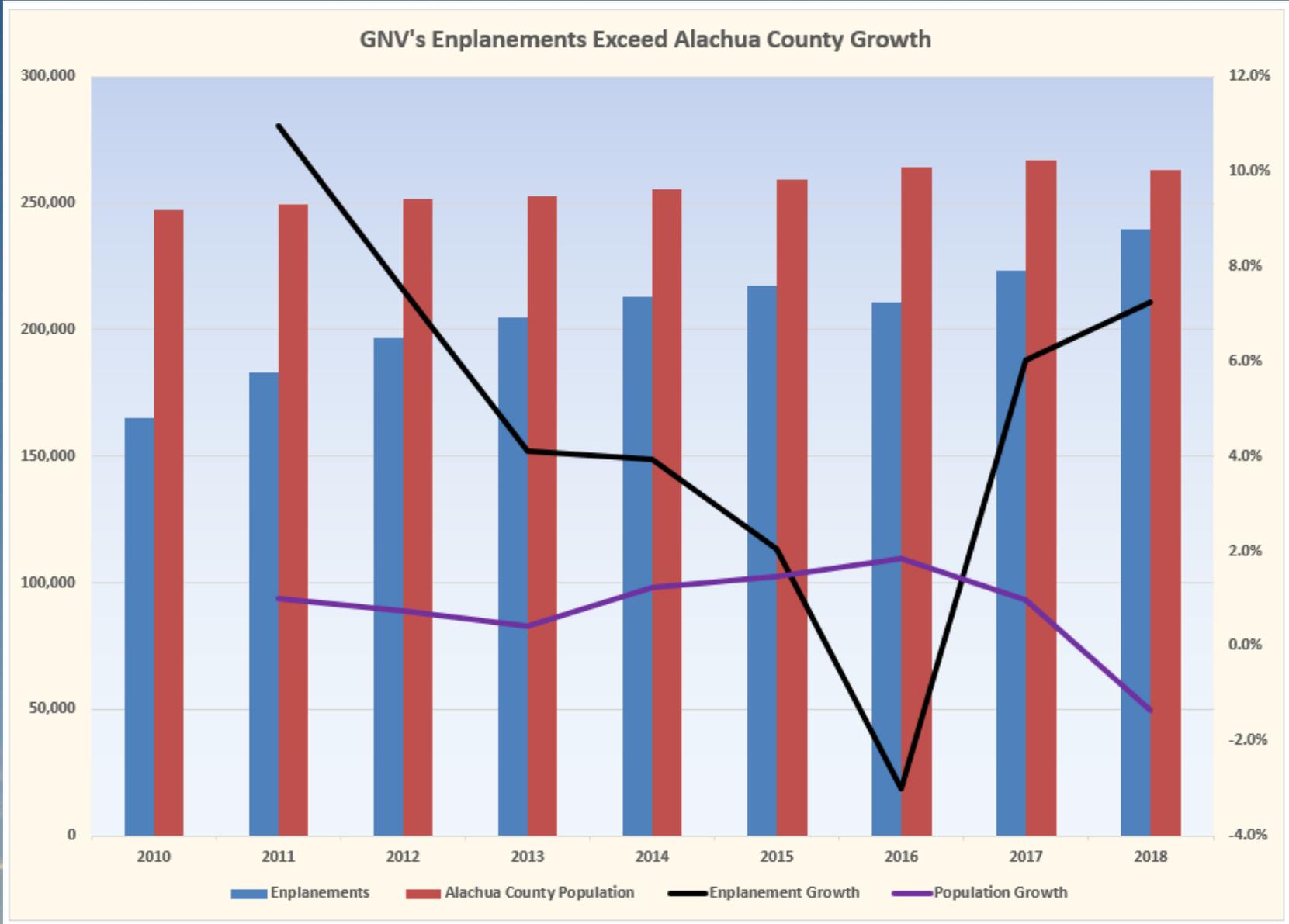
Source: Gainesville Regional Airport

GNV Enplanements vs. FAA Forecast (2017 TAF)

GNV's Enplanements for 2013 Through 2016 Exceed FAA's Forecast



GNV's Enplanements vs. Alachua County Population Growth

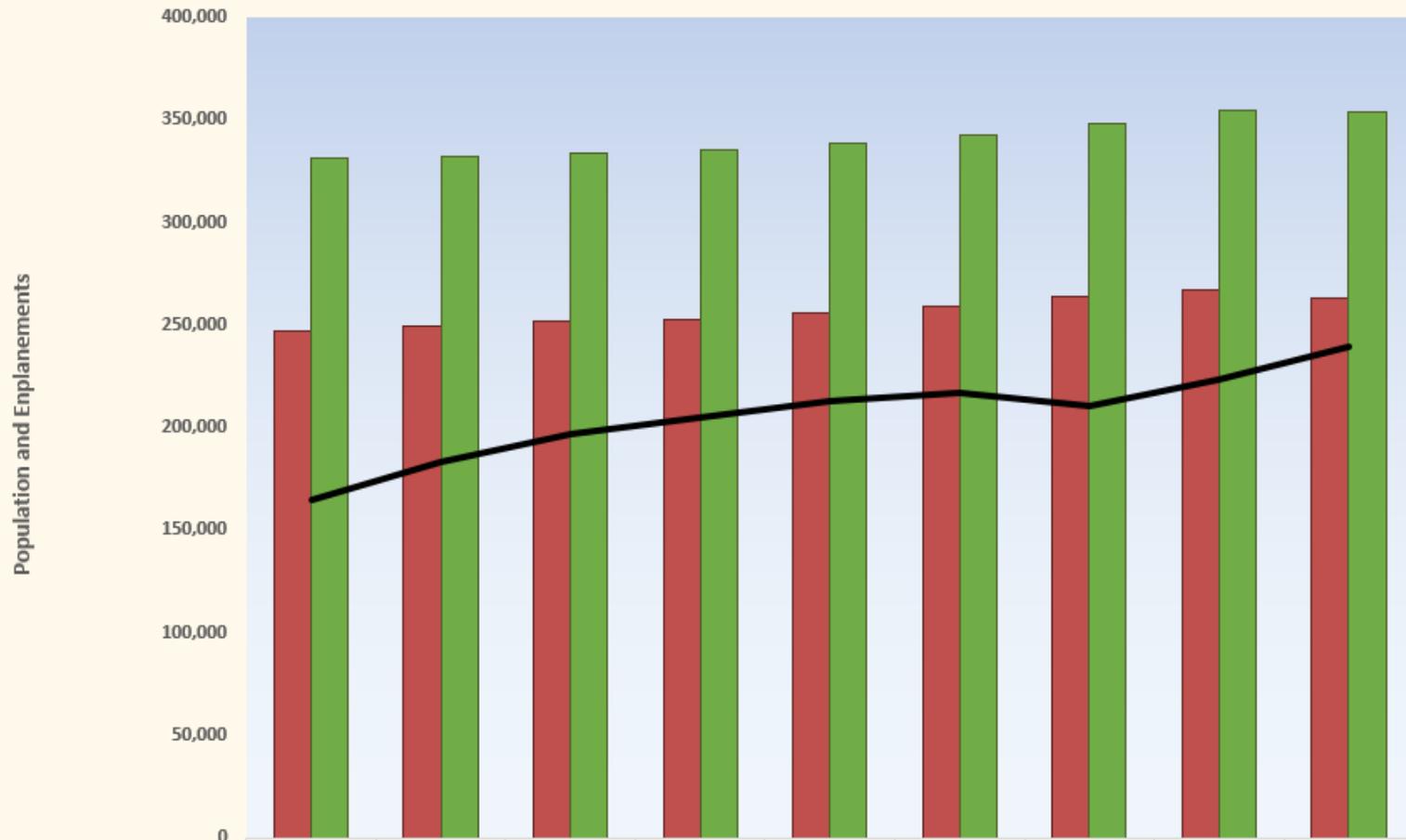


Sources: Gainesville Regional Airport – Enplanement Actuals
 University of Florida Bureau of Economic and Business Research - Population

GNV Enplanements and Population 2010 - 2018

Alachua and Marion Counties

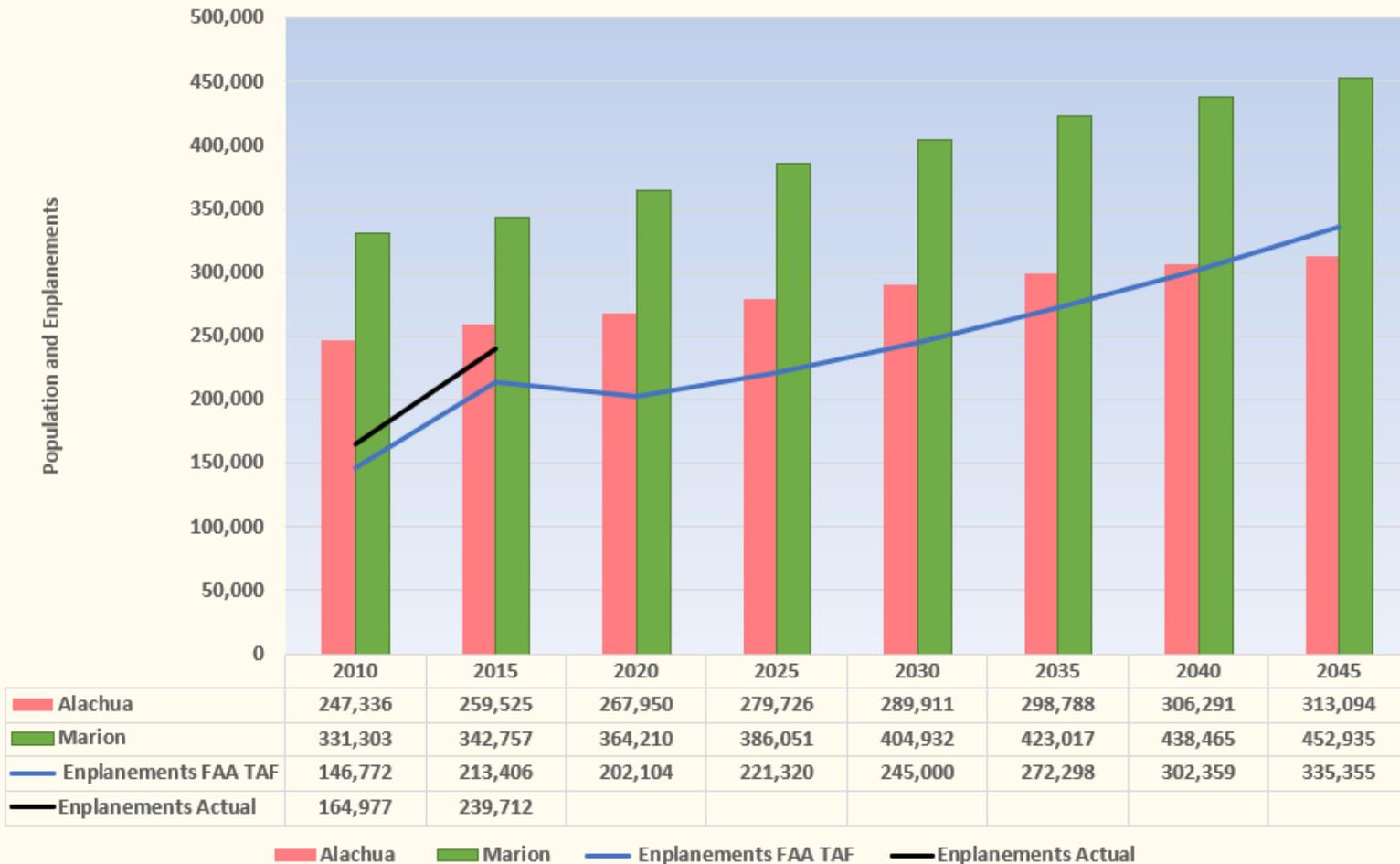
Gainesville Regional Airport Enplanements and
Population Alachua and Marion Counties
2010 through 2018



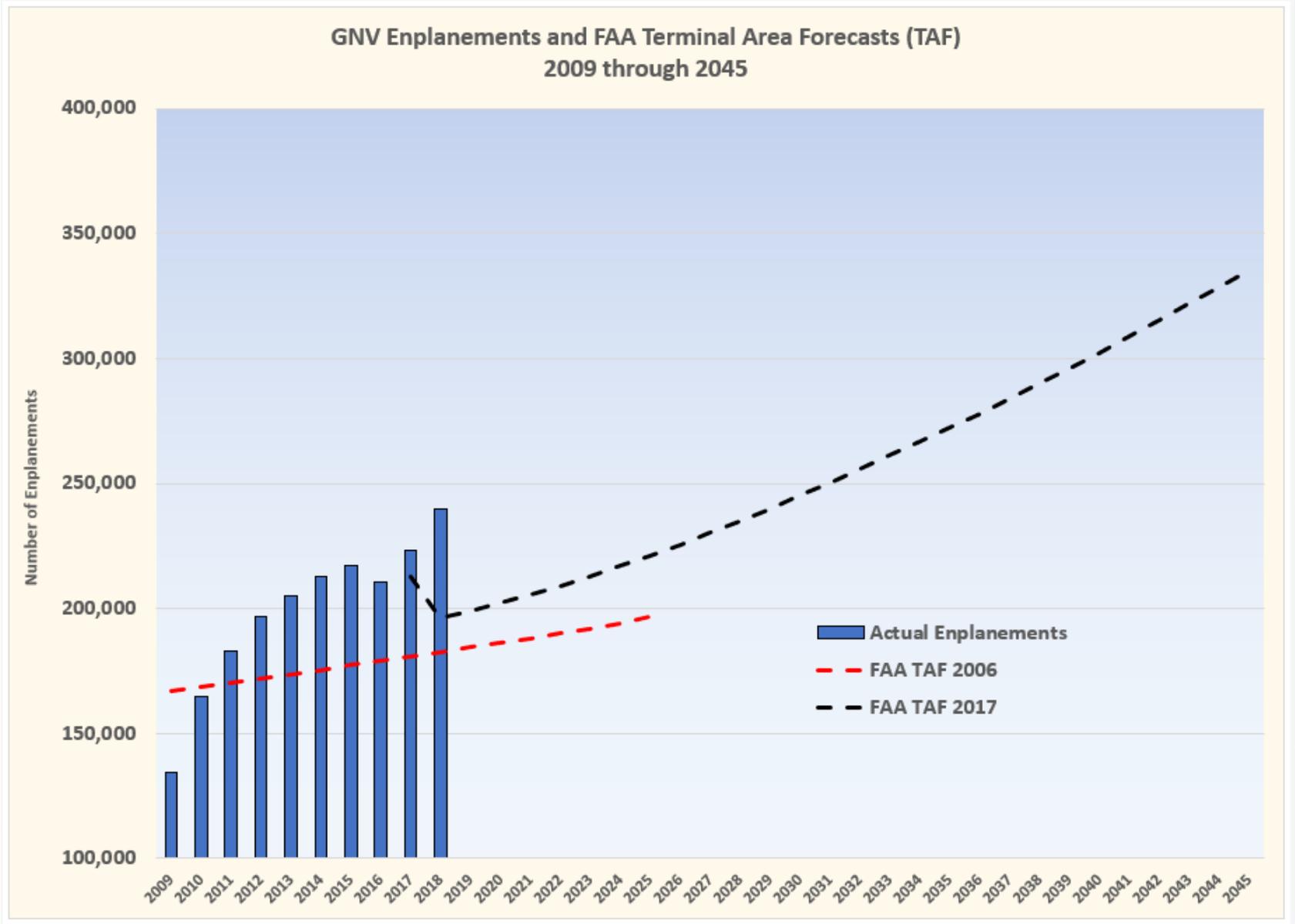
Alachua County Population	247,336	249,832	251,654	252,704	255,809	259,525	264,341	266,944	263,291
Marion County Popl.	331,301	332,307	334,004	335,274	338,368	342,757	348,139	354,353	353,898
Enplanements	164,977	183,091	196,840	204,924	213,014	217,358	210,821	223,498	239,712

FAA TAF Commercial Enplanements Forecast Alachua and Marion Counties Population Forecasts

Gainesville Regional Airport
FAA Terminal Area Forecast and Population: Alachua and Marion Counties
2010 - 2045



GNV Enplanements and FAA TAF Forecasts 2009 – 2045

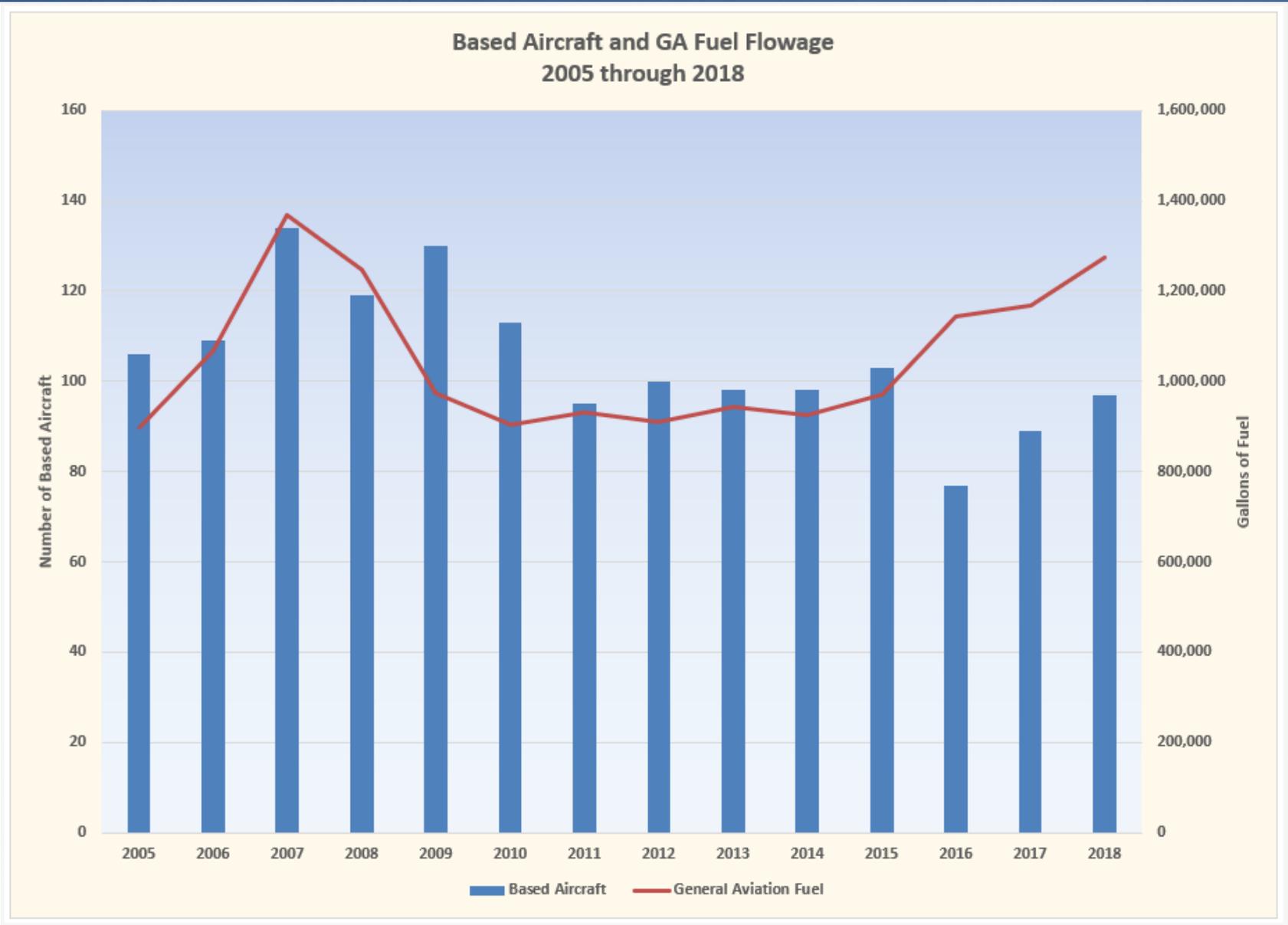


GNV Based Aircraft 1990 - 2018

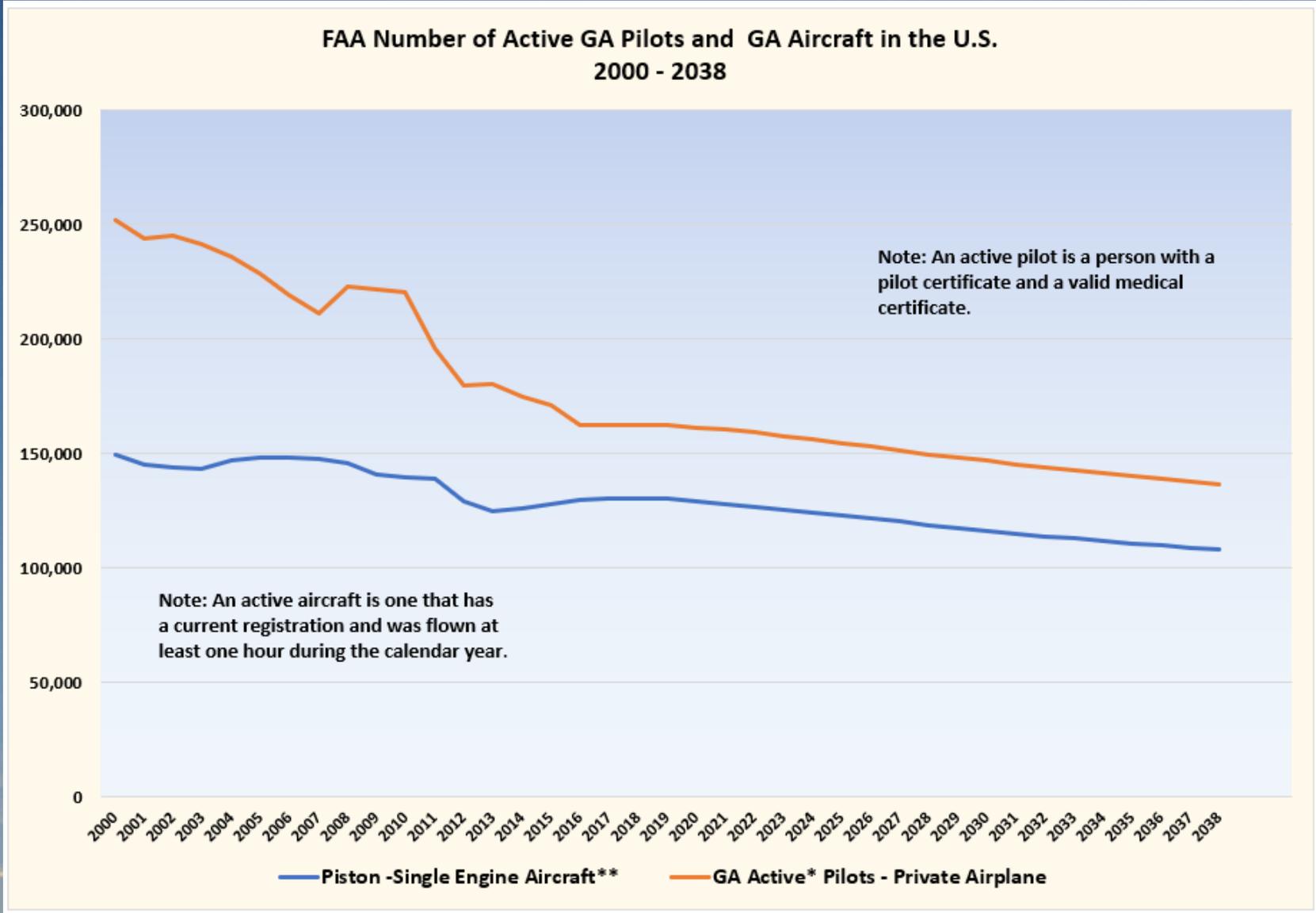


Source: Gainesville Regional Airport

GNV Based Aircraft and GA Fuel Flowage 2005 - 2018



FAA Number of Active Pilots and GA Aircraft in the U.S.

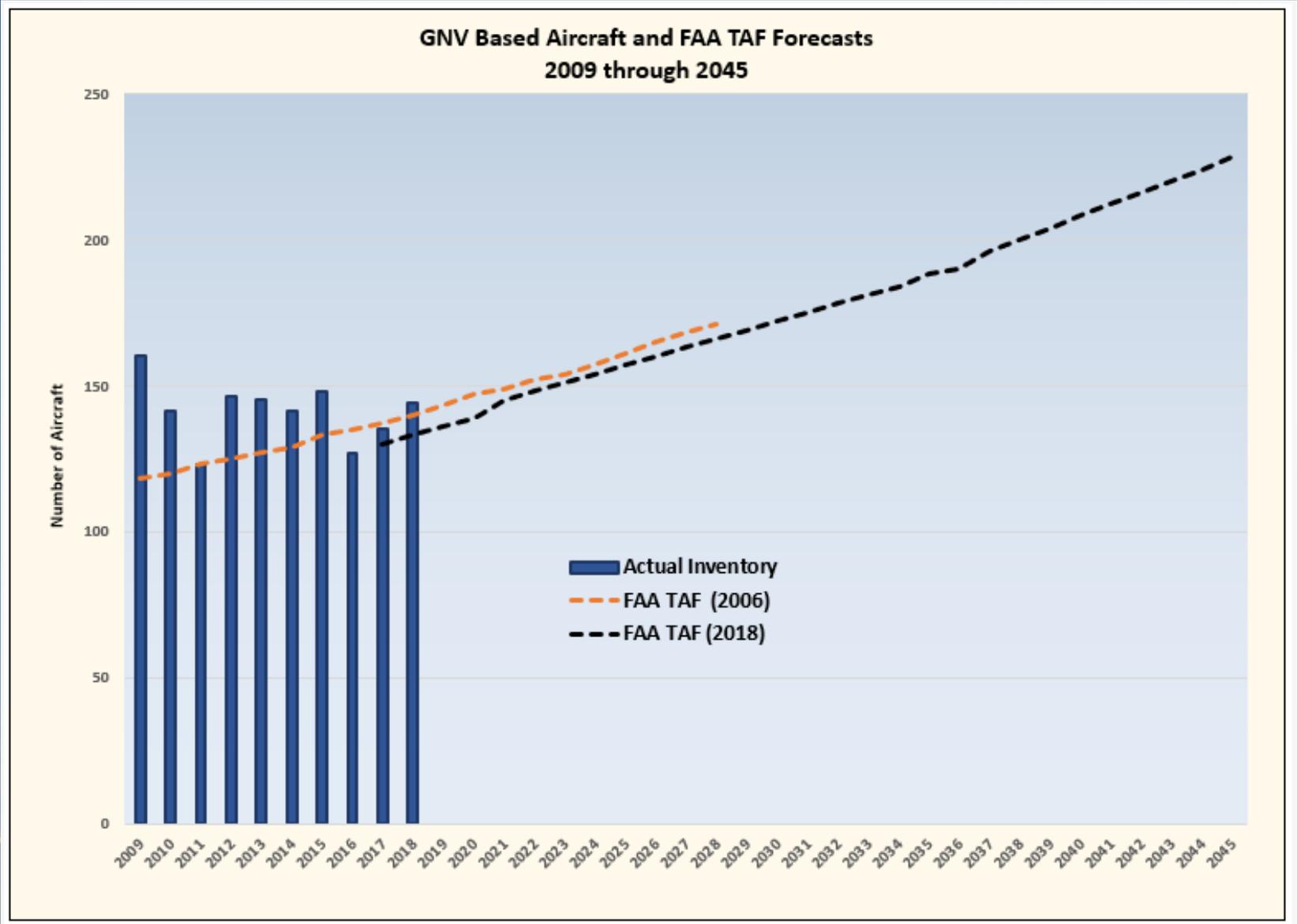


*Source: FAA U.S. Civil Airmen Statistics

** Source: 2001 – 2010, 2012-2016, FAA General Aviation Air Taxi Activity Surveys

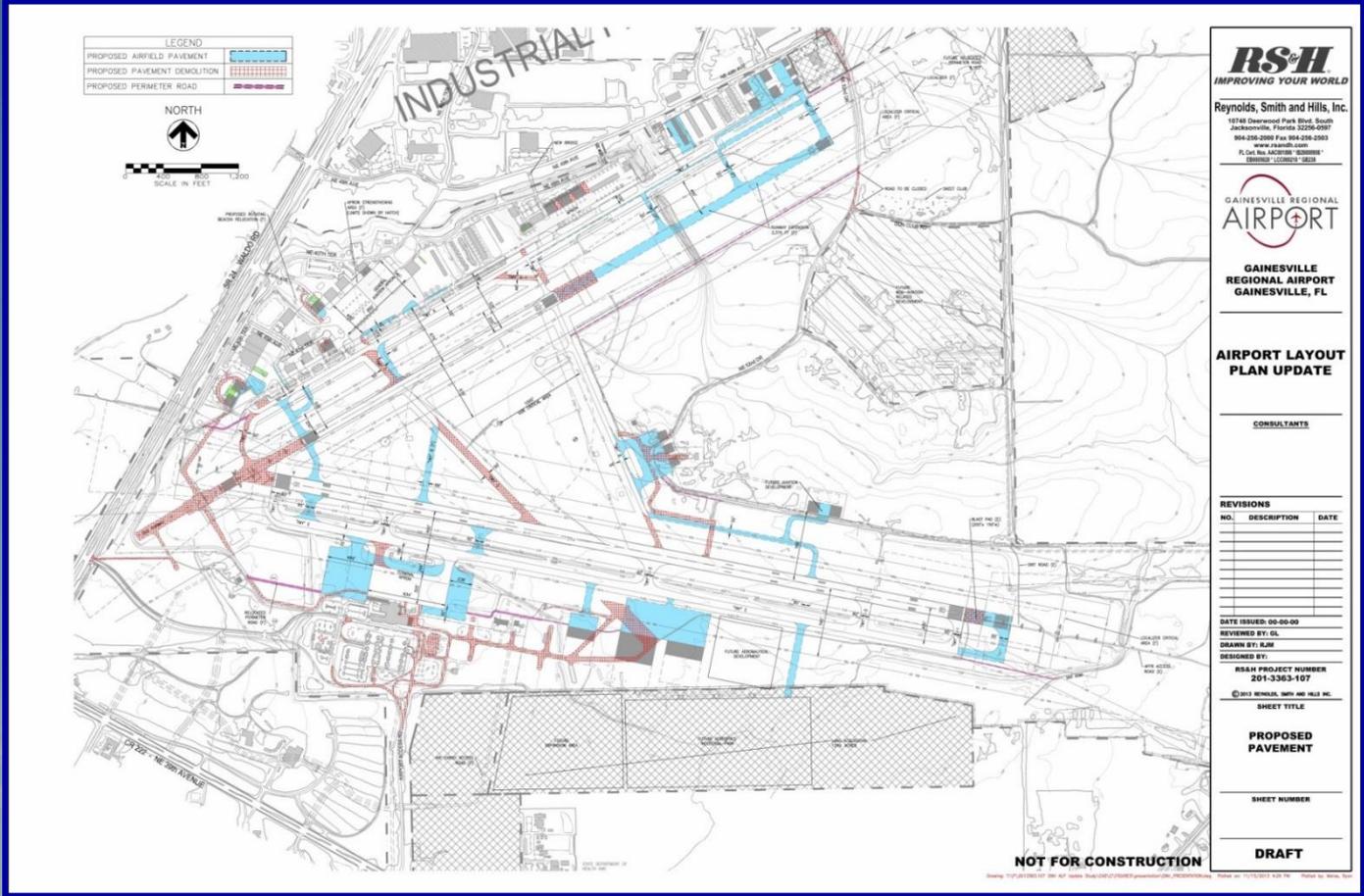
CATEGORY	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008
Pilot--Total	609,306	584,362	590,039	593,499	599,086	610,576	617,128	627,588	594,285	613,746
Student 1/	149,121	128,501	122,729	120,546	120,285	119,946	118,657	119,119	72,280	80,989
Recreational (only)	153	175	190	220	238	218	227	212	234	252
Sport (only)	6,097	5,889	5,482	5,157	4,824	4,493	4,066	3,682	3,248	2,623
Airplane 2/										
Private	162,455	162,313	170,718	174,883	180,214	188,001	194,441	202,020	211,619	222,596
Commercial	98,161	96,081	101,164	104,322	108,206	116,400	120,865	123,705	125,738	124,746
Airline Transport	159,825	157,894	154,730	152,933	149,824	145,590	142,511	142,198	144,600	146,838
Rotorcraft (only) 3/	15,355	15,518	15,566	15,511	15,114	15,126	15,220	15,377	15,298	14,647
Glider (only) 4,5/	18,139	17,991	19,460	19,927	20,381	20,802	21,141	21,275	21,268	21,055
Flight Instructor Certificates 6/	106,692	104,382	102,628	100,993	98,842	98,328	97,409	96,473	94,863	93,202
Instrument Ratings 6,7/	306,652	302,572	304,329	306,066	307,120	311,952	314,122	318,001	323,495	325,247
Remote Pilots 9/	69,166	20,362	NA							
Non Pilot--Total 8/	671,222	652,943	728,329	717,399	707,155	701,291	695,515	686,717	682,315	678,181
Mechanic 8/	286,268	279,435	342,528	341,409	338,844	337,775	335,431	331,989	329,027	326,276
Repairmen 8/	35,040	34,411	39,363	39,566	39,952	40,444	40,802	41,267	41,389	41,056
Parachute Rigger 8/	6,192	5,851	8,846	8,702	8,491	8,474	8,491	8,407	8,362	8,248
Ground Instructor 8/	66,423	65,053	70,957	71,755	72,493	73,599	74,586	75,205	75,461	74,983
Dispatcher 8/	20,664	19,758	23,754	23,113	22,401	21,862	21,363	20,691	20,132	19,590
Flight Navigator	64	67	102	115	126	141	146	174	181	222
Flight Attendant	222,037	212,607	200,319	188,936	179,531	172,357	167,037	159,946	156,741	154,671
Flight Engineer	34,534	35,761	42,460	43,803	45,317	46,639	47,659	49,038	51,022	53,135

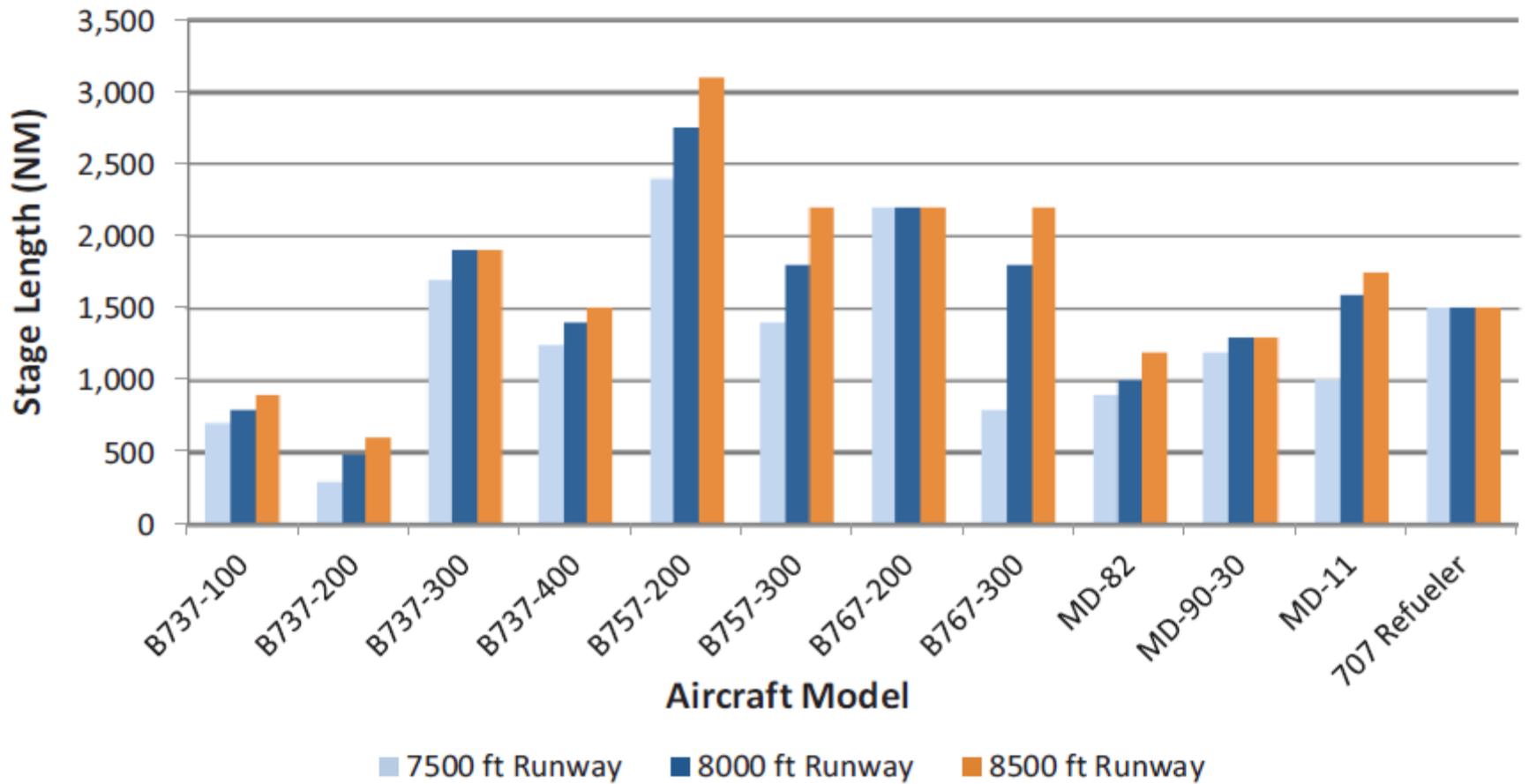
GNV Based Aircraft and FAA TAF Forecasts 2009 - 2045



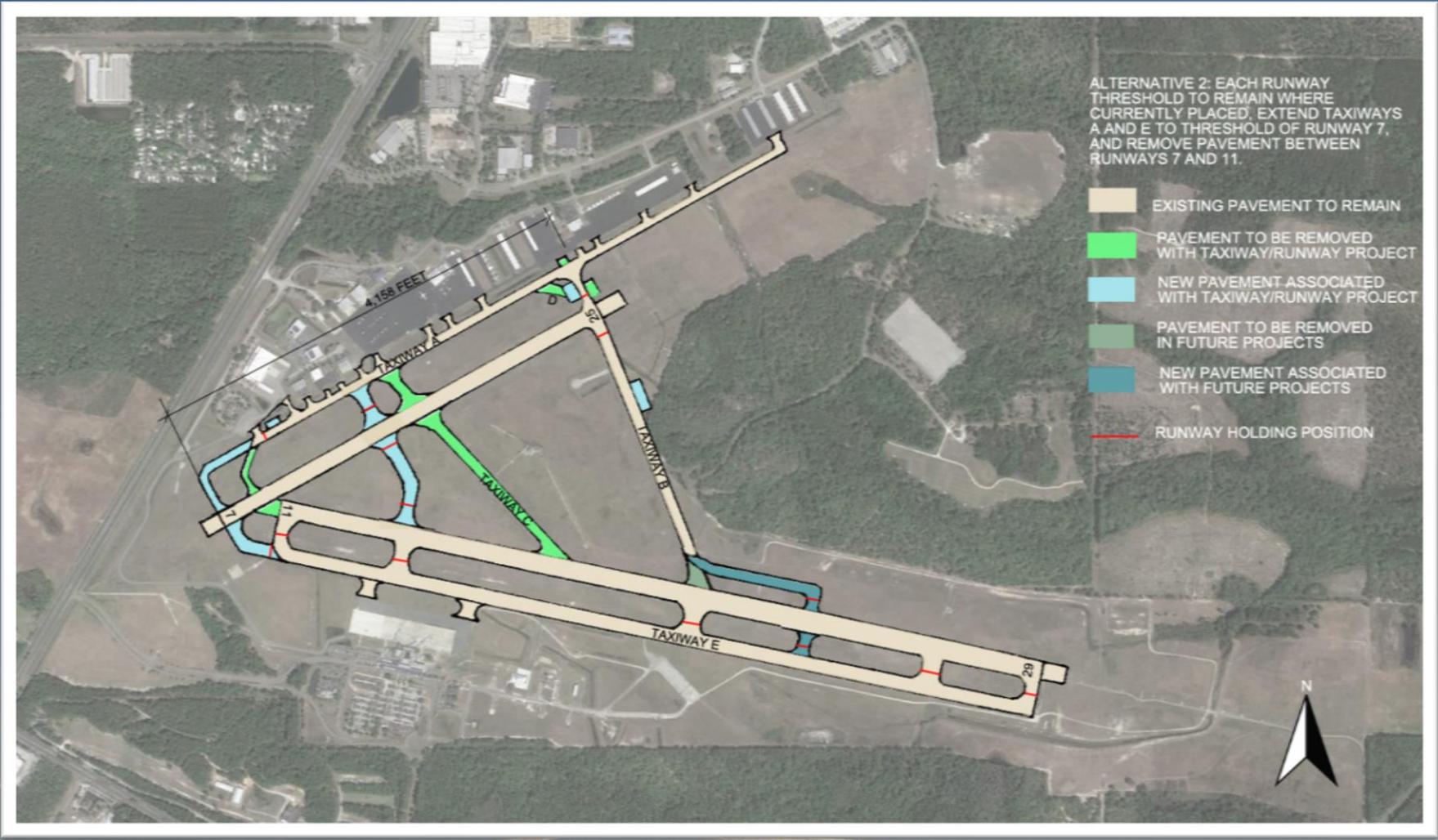
Strategic Improvements:

- Aeronautical
- Non-aeronautical
- Land Acquisition
- Reduce Barriers to Development





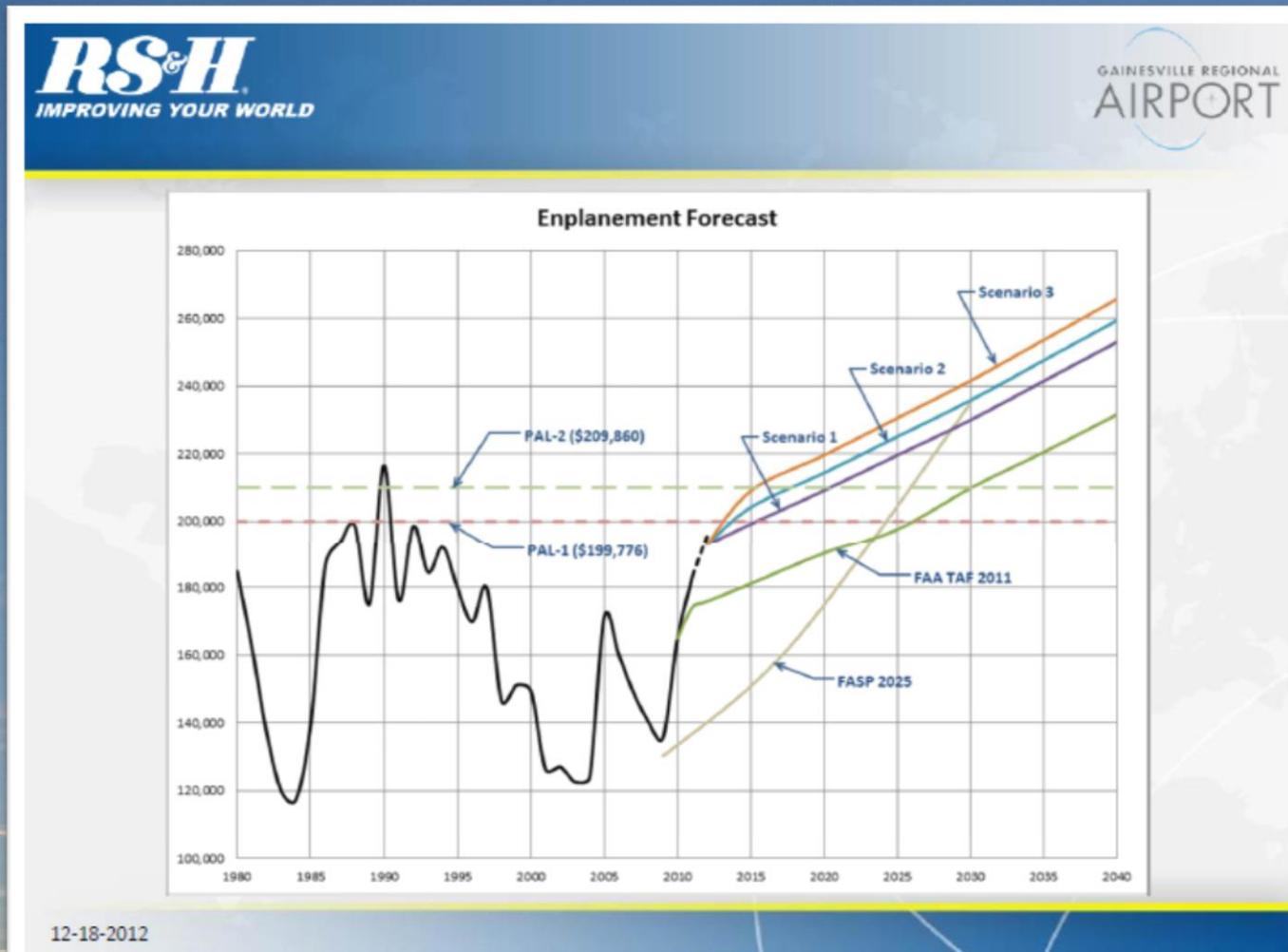
Planned Taxiway Geometry Changes – ALP Update 2018



GNV Outperforms:

- 2011 FAA TAF
- Florida Aviation System Plan
- Growth Scenario 3 (3% annual)
2013 Terminal Planning Study

GNV Reaches 80% Terminal Planning Activity Level X Years Early.

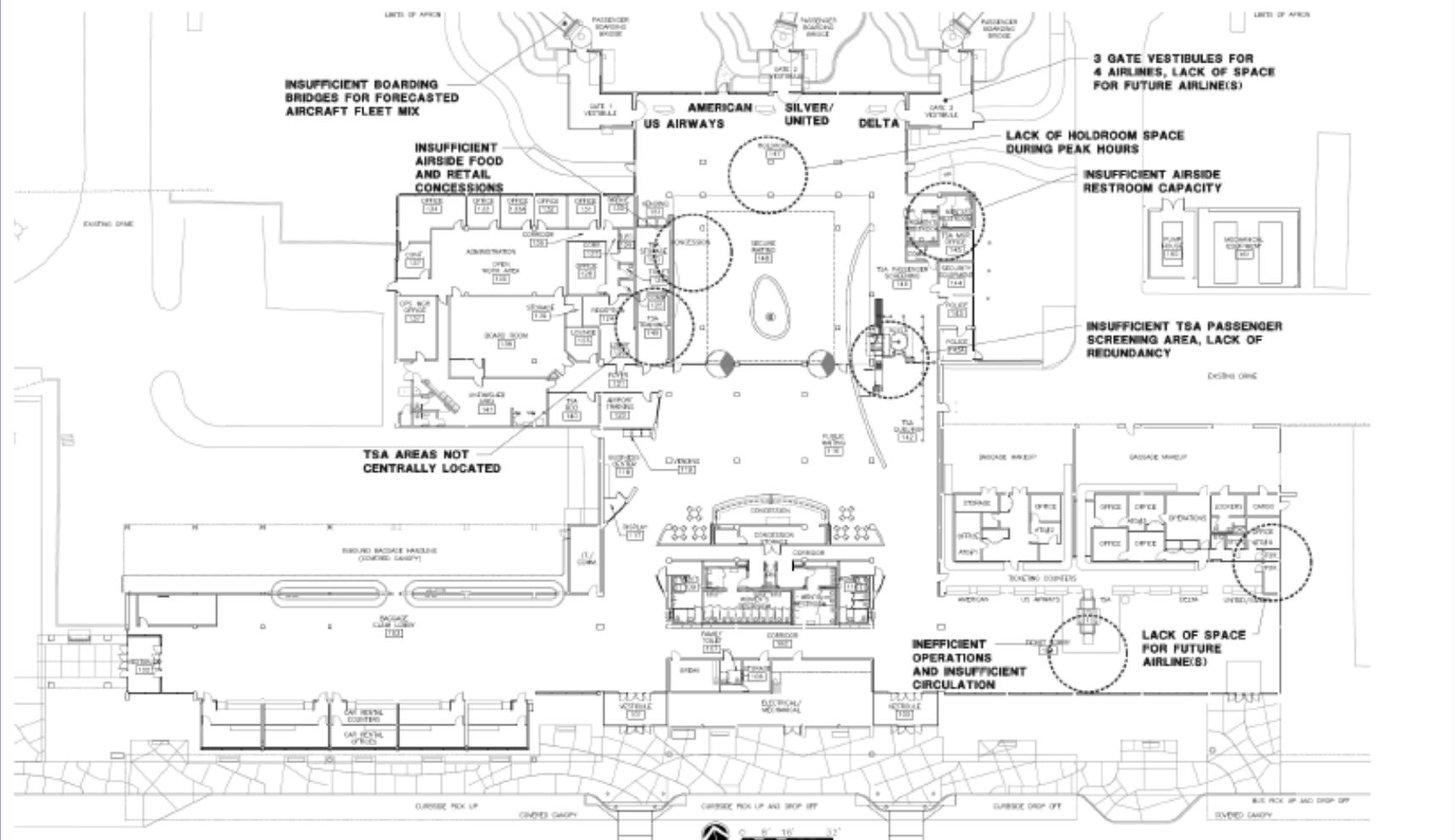


Terminal Requirements to Support Continued Growth

RS&H Terminal Planning Whitepaper - 2015



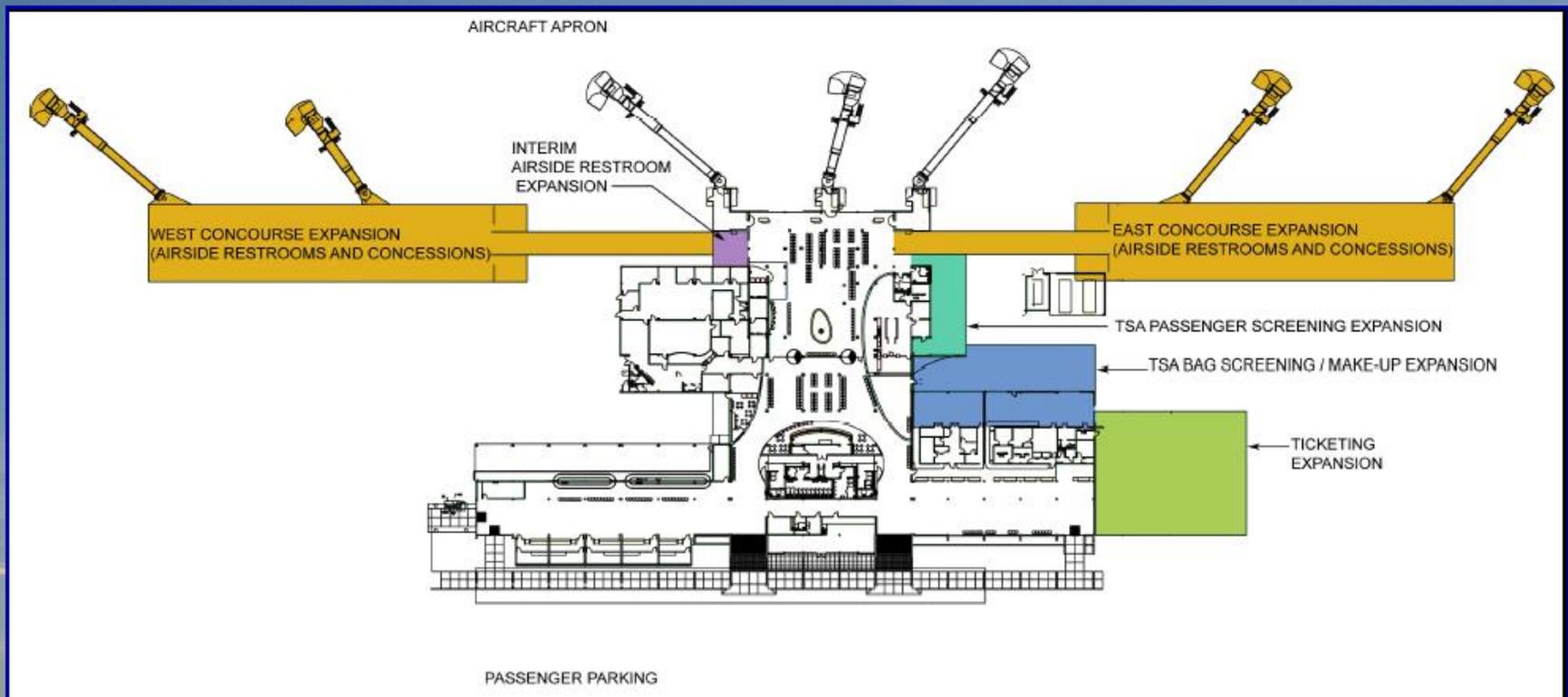
Figure 4-1
EXISTING TERMINAL - PROBLEM AREAS



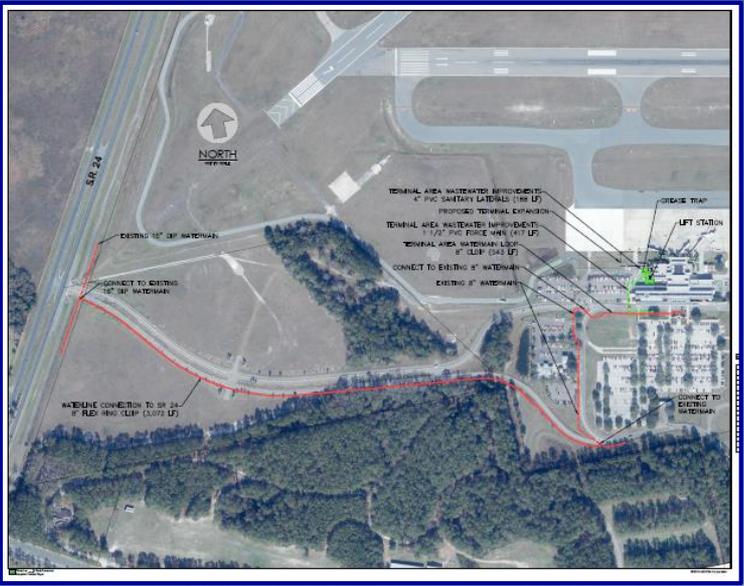
Terminal Expansion Concepts

RS&H Terminal Concept Study - 2013

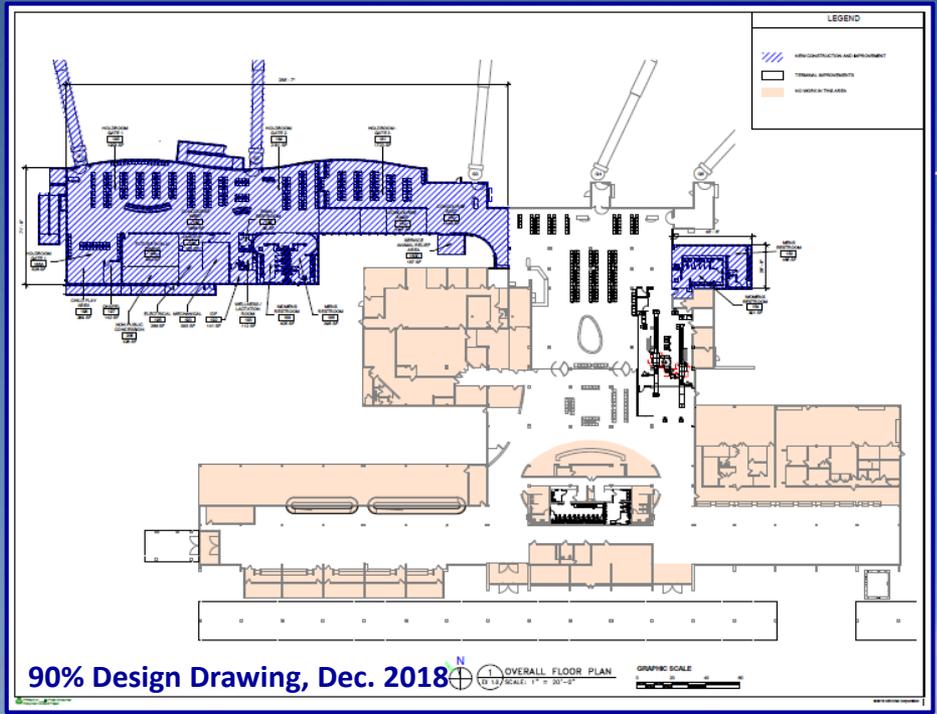
- Departure Lounge Expansion
- Mid- Level Concourse with Passenger Bridges
- Restrooms and Concessions
- Aircraft Apron Expansion
- TSA Checkpoint Expansion (2 lanes)
- Airline Ticket Office Expansion
- Inline Bag Screening System (serving all counters)
- Ticket Lobby Improvements (Relocate EDS)



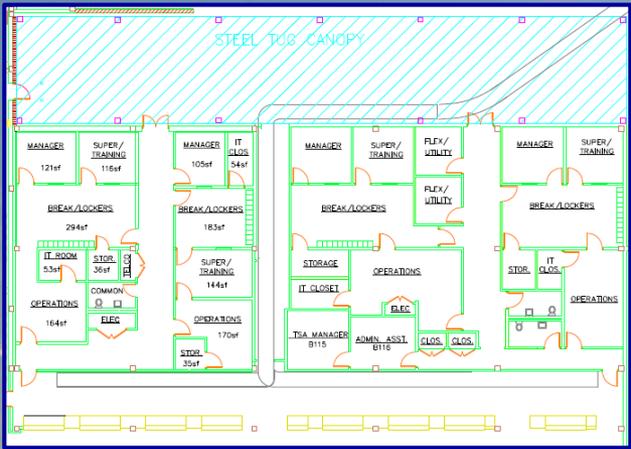
Planned Terminal Improvements, Phase I through IV (2018-2022)



8 inch Water Line and Sewer Improvements - Under Construction , Dec. 2018



90% Design Drawing, Dec. 2018



Airline Operations Expansion Concept



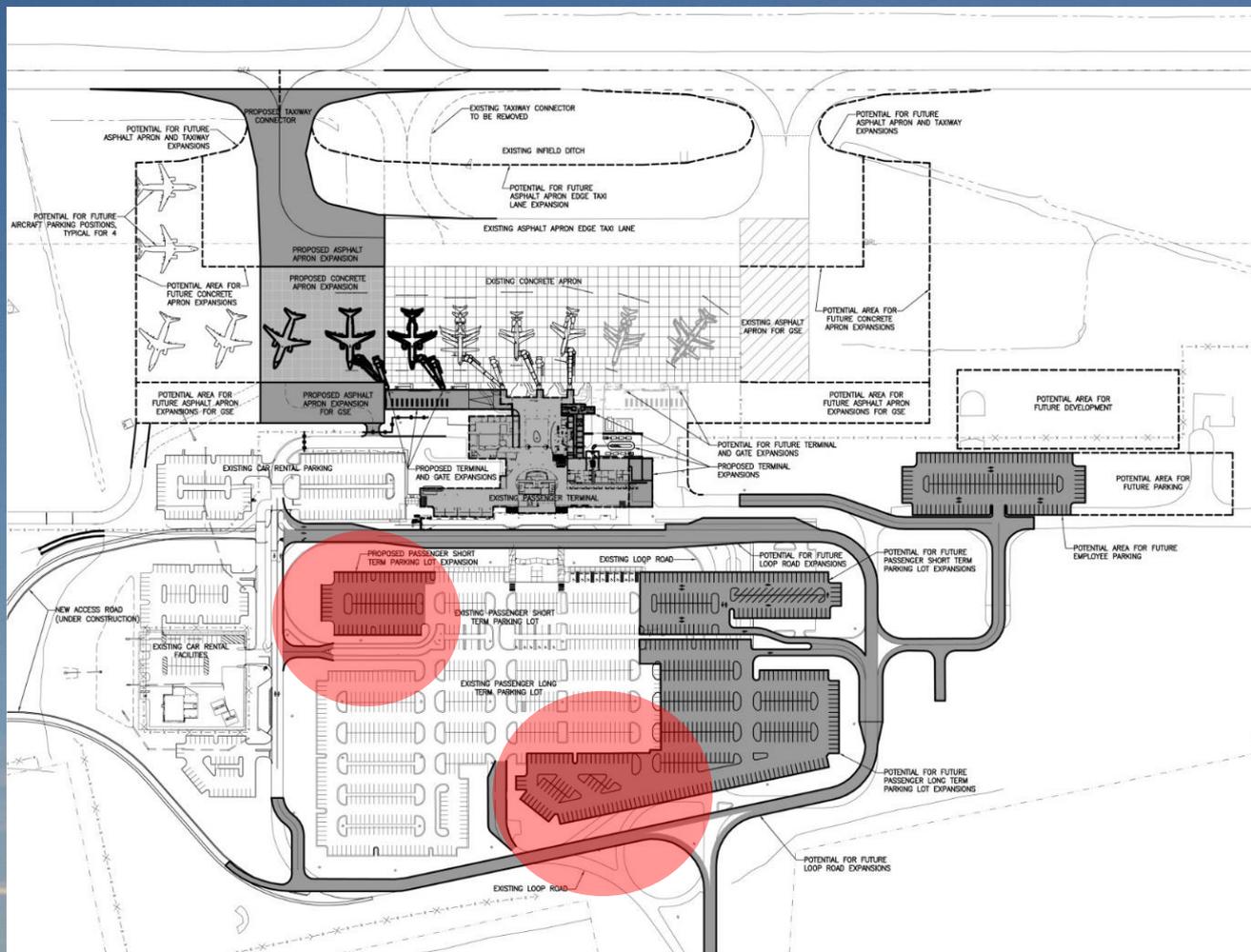
Outbound Baggage System Concept

Terminal Expansion - Baggage Screening and Make-up Area



Terminal and Surface Parking Expansion Concept

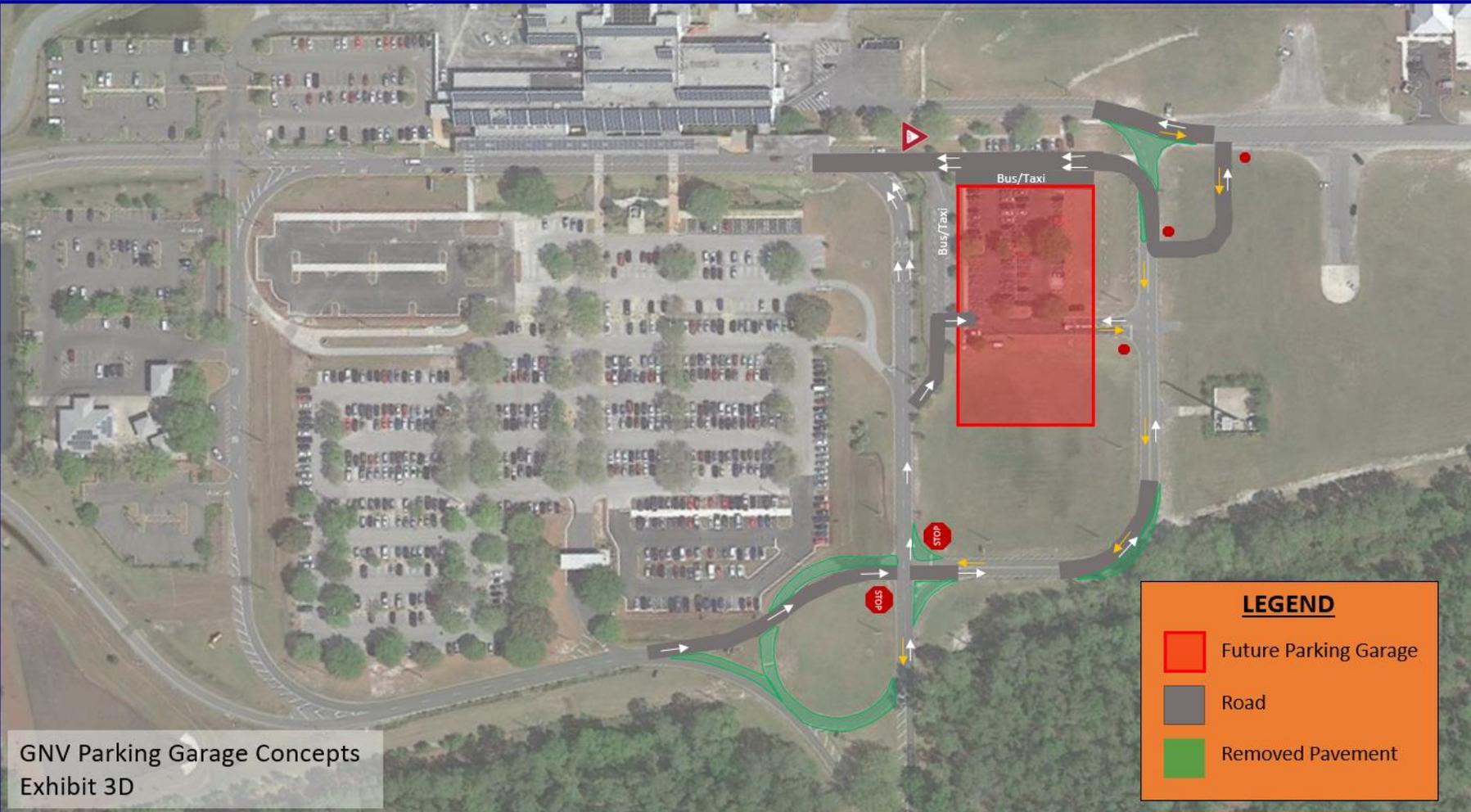
RS&H Terminal Concept Study - 2013



Phase Completed
(2018)

Proposed 400-600 Space Parking Garage and Multimodal Bus Terminal

One of several preliminary concepts, December 2018



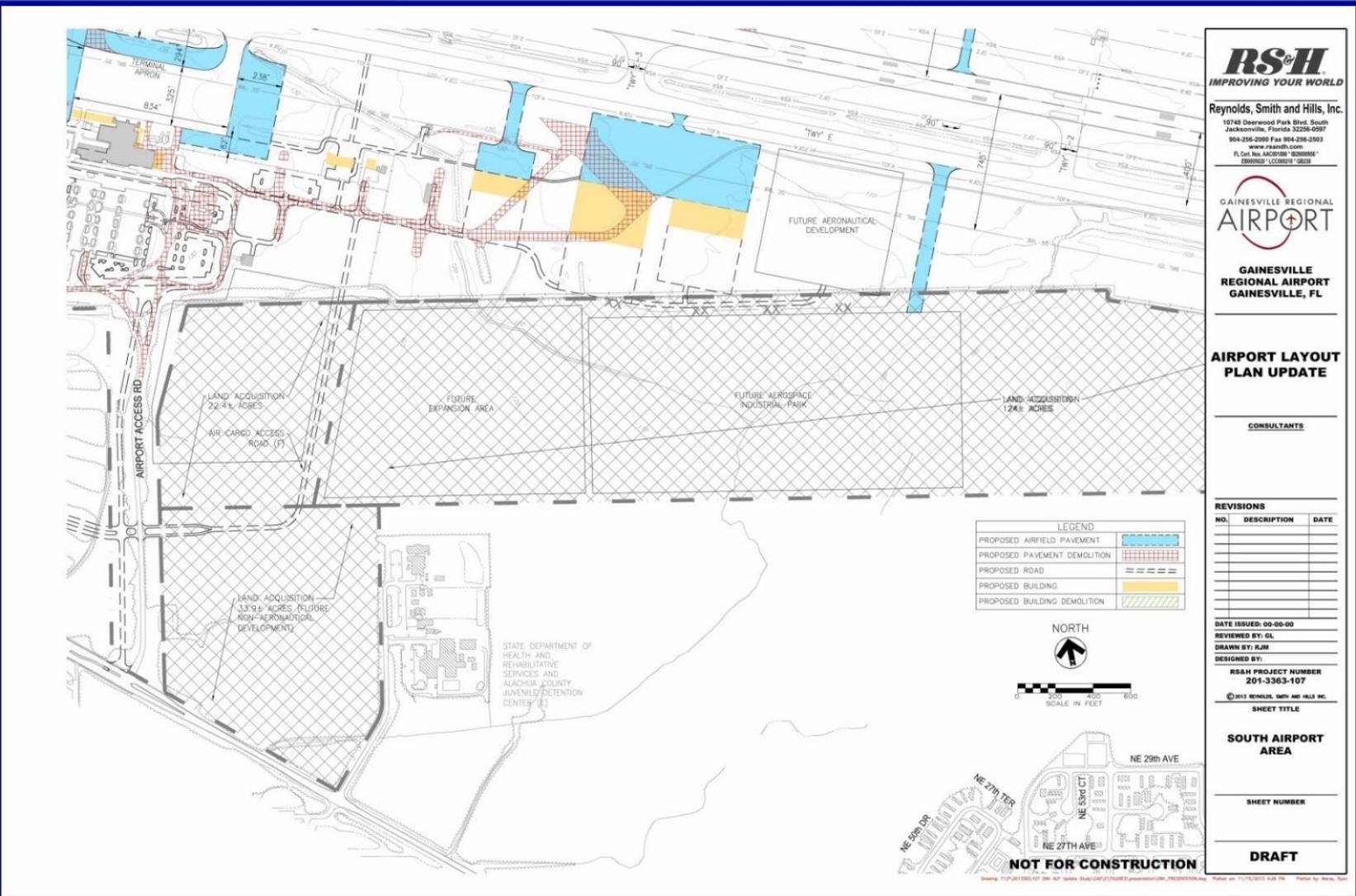
GNV Parking Garage Concepts Exhibit 3D

LEGEND

- Future Parking Garage
- Road
- Removed Pavement

Adjacent State Surplus Lands

Light Manufacturing, Office, Warehouse



Reynolds, Smith and Hills, Inc.
 10748 Deerwood Park Blvd. South
 Jacksonville, Florida 32256-0097
 904-256-2000 Fax 904-256-2503
 www.rsandh.com
 FL Cert. No. AAC01008100000006
 ENGINEER LICENSE # 14828



GAINESVILLE
 REGIONAL AIRPORT
 GAINESVILLE, FL

AIRPORT LAYOUT PLAN UPDATE

CONSULTANTS

REVISIONS

NO.	DESCRIPTION	DATE

DATE ISSUED: 00-00-00
 REVIEWED BY: GL
 DRAWN BY: RJM
 DESIGNED BY:

RS&H PROJECT NUMBER
 201-3363-107

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 SHEET TITLE

**SOUTH AIRPORT
 AREA**

SHEET NUMBER

DRAFT



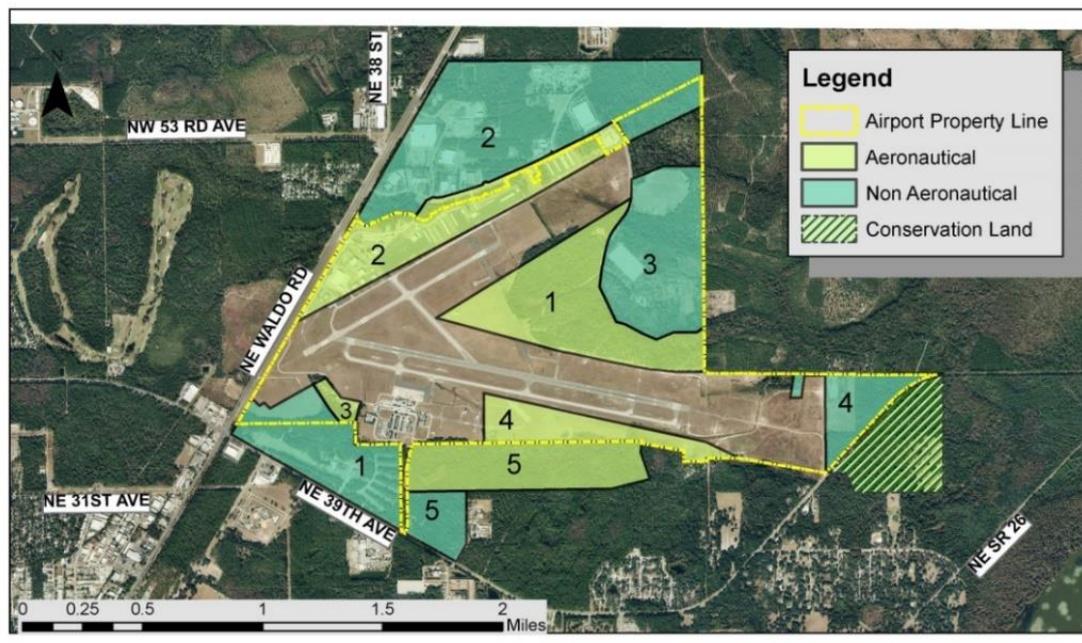
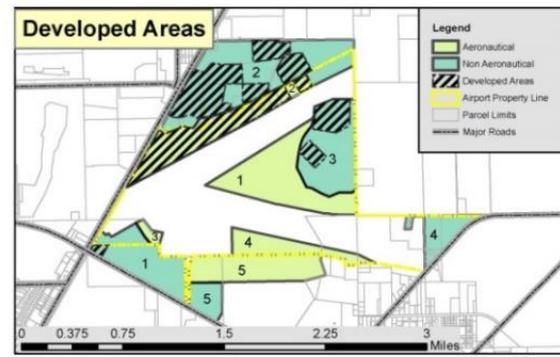
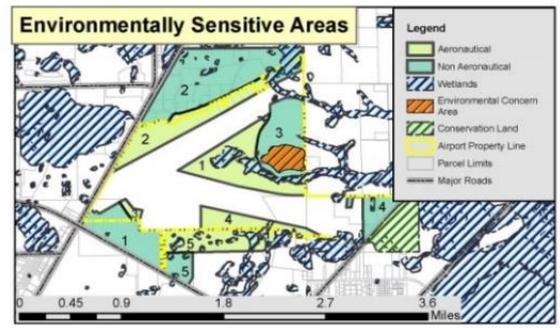
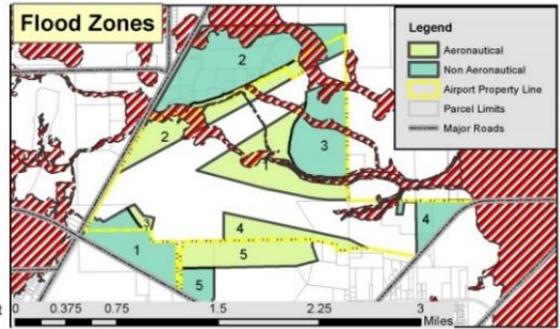
Potential Land Development

Gainesville Regional Airport Developable Area Exhibit

Aeronautical Area (acres)						
Sub Area	Total Area	Area in Flood Zone	Area in Wetland, ECA, or Conservation Land	Existing Developed Area	Developable Area	% Total Area Available
A-1	189.00	29.50	67.00	0.00	96.50	51%
A-2	147.00	33.00	7.00	141.00	6.00	4%
A-3	11.00	0.00	2.60	0.00	8.40	76%
A-4	72.00	0.00	9.75	0.00	62.25	86%
A-5	125.00	0.00	24.00	0.00	101.00	81%

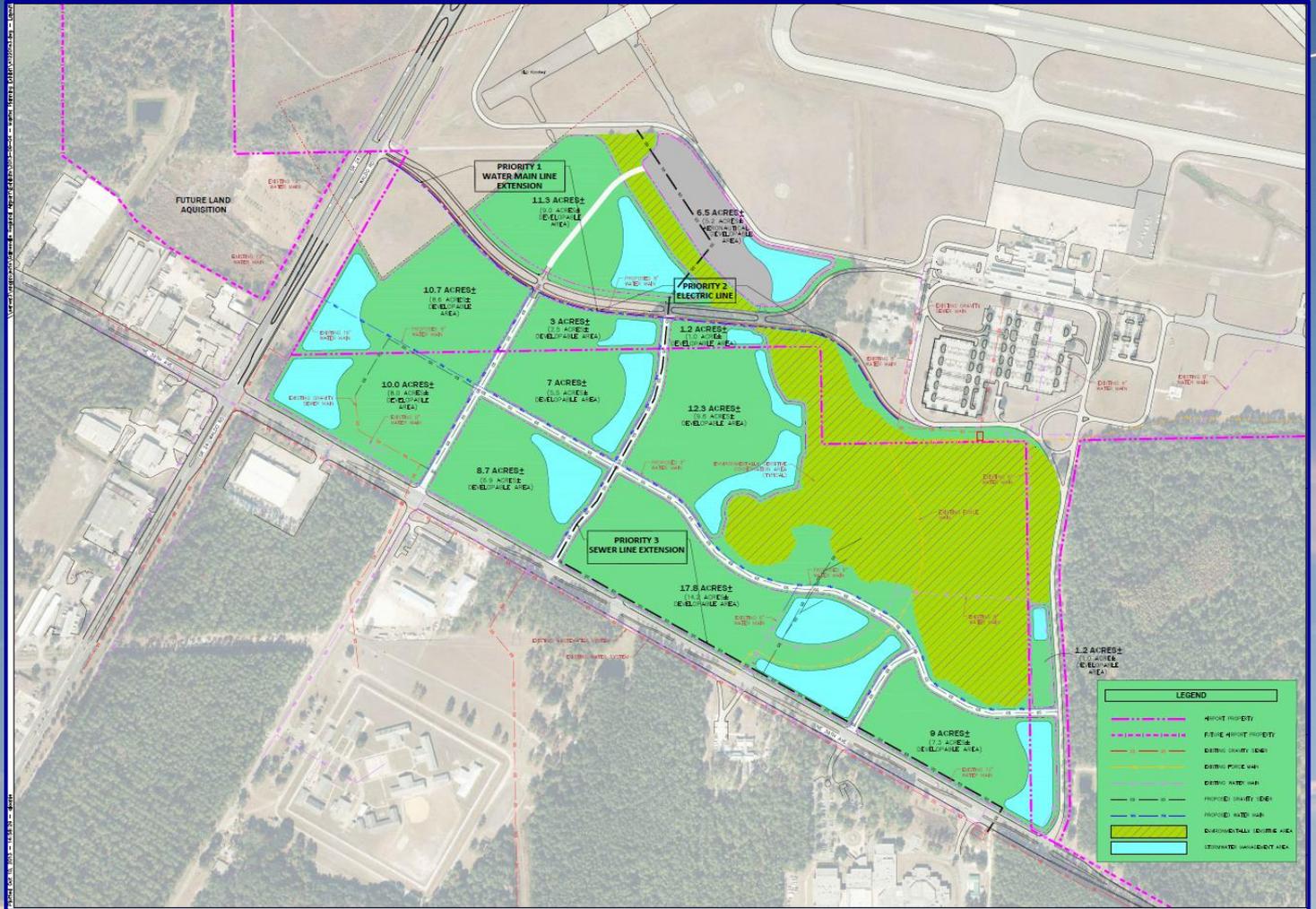
Non-Aeronautical Area (acres)						
Sub Area	Total Area	Area in Flood Zone	Area in Wetland, ECA, or Conservation Land	Developed Area	Developable Area	% Total Area Available
NA-1	127.00	0.00	27.50	5.00	94.50	74%
NA-2	330.00	76.00	58.00	154.00	75.75	23%
NA-3	163.00	26.00	61.00	51.00	44.67	27%
NA-4	57.00	0.50	3.50	0.00	53.00	93%
NA-5	38.00	0.00	3.00	0.00	35.00	92%

NOTES:
 Land use areas are approximated and intended to provide a general allocation of developable area with each sub area.
 The wetland areas identified below do not include required wetland buffers per city code.
 The developable area identified below will be required to provide stormwater management facilities, which will reduce the net amount of acreage for physical development.



Gateway Development Concept

- Hotel
- Restaurant
- Gas Station
- Professional Services
- Office Buildings
- Research & Development
- Aeronautical Services (north side)



City of Gainesville – Airport Clear Zones

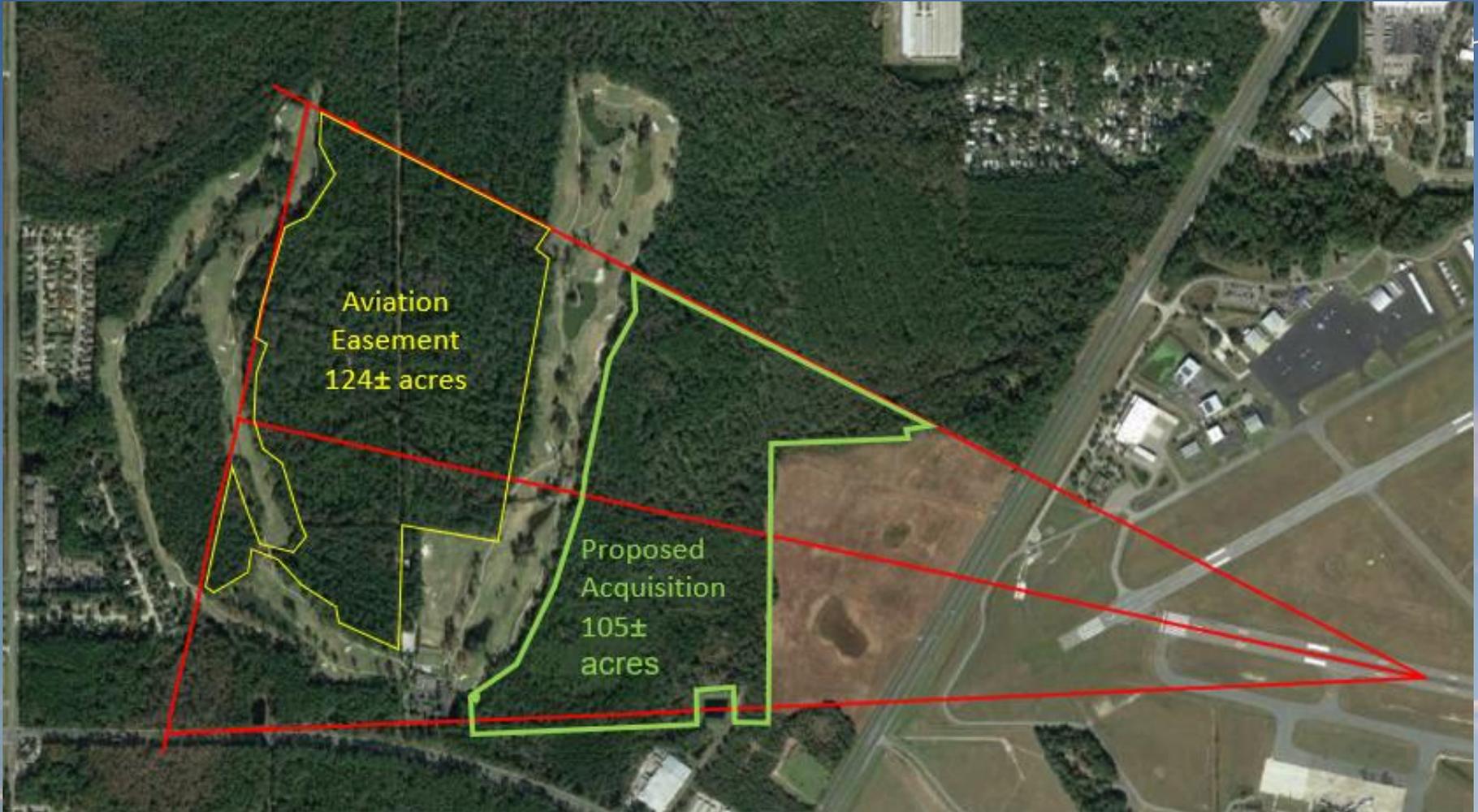


Area of Study for Possible Future Land Acquisition



 Possible future land acquisition area

Proposed Property Acquisition & Easement



SWOT Analysis and Action Plan

Strengths	Goal	Objective/ Action Item
Airfield Safety and Terminal Operations		
Good, solid airfield pavement infrastructure	Provide safe and efficient airfield infrastructure. Provide for timely rehabilitation and continuous, cost effective improvement.	Continue to monitor FDOT PCI inspections. Plan for timely pavement replacement/rehabilitations in JACIP with minimum operational impact. Prioritize pavement rehab with primary emphasis on Runway 11-29. Continue crack sealing program to extend pavement life.
NAVAIDS and airfield lighting appropriate. Reasonable minimums and approach options under most weather conditions.	Provide maximum safety and utility under all weather and operating conditions.	Facilitate new opportunities for GPS based approaches and reduced minimums through future obstruction removal and airspace protection.
Relatively mild weather conditions. No ice and snow.	Same as above.	Monitor NOTAM performance and use of on-line reporting system (NOTAM Manager). Upgrade ASOS and lobby for redundant sensors and systems. Coordinate with ATC to supplement weather observing as necessary. Continue to arrange for overtime, as needed, in the event of ASOS failures or afterhours charter operations.
Fencing and security infrastructure in very good condition	Facilitate safe and efficient air commerce.	Continue to inspect, maintain, assess needs and improve as necessary.
Apron lighting greatly improved	Facilitate safe and efficient air commerce.	Collect feedback, monitor, maintain and improve as necessary. Consider move to LED when options improve and age meets FAA replacement requirement.
Good safety awareness culture and safety procedures in place including airfield safety through FAA ACM process. Safety Committee and suggestion/whistleblower program.	Facilitate safe and efficient air commerce. Perform at a high level of safety for all activities in an environment of continuous improvement.	Develop additional awareness programs and positive reinforcement. Implement new SMS system when FAA rules are finalized.
Well developed Airport Security Program and procedures in place. High level of confidence exhibited by FAA and TSA through past performance.	Perform at a high level of safety for all activities in an environment of continuous improvement.	Continue to stay abreast of TSA, FAA and industry developments. Make adjustments to ASP, ACM and inspection regimen as needed.
Various employee training programs in place as well as regular, scheduled safety and security meetings.	Develop and maintain a high performing work force.	Encourage employee in AAAE ACE program. Continue to develop and refine in-house training, safety and educational programs.
High level of training and professional attitude of senior staff and certain skilled staff.	Perform at a high level of safety for all activities in an environment of continuous improvement.	Foster continuous improvement. Encourage joining and participating in professional and industry associations. Support opportunities for industry training and networking events.
Good level of training and professionalism of Operations Staff.	Perform at a high level of safety for all activities in an environment of continuous improvement.	Continue use of ATN digicast and AAE Basic and Advanced ASOS. Encourage and support additional certifications in ACE program and FAC specialty conference and other training opportunities.
GPD staff is helpful and experienced. Little turnover.	Facilitate safe and efficient air commerce.	Monitor changes for intervention as necessary. Continue regular meetings with GPD, TSA and Airline management to discuss issues, problems and needed changes. Review and update airport specific training program regularly.

Weaknesses	Goal	Objective/ Action Item
Don't have full length secondary runway. Makes major maintenance or handling incidents on primary runway more complicated but not unusual for airports our size.	Continue long-term planning process for runway 7-25 extension.	Improve "harden" Runway 11-29 lighting system, replace underground cabling.
GA apron strengths inconsistent. Can't handle heavier charter aircraft. Some areas not suitable for even light jets.	Rehabilitate aprons at higher strength	Improve FBO/Tower communication on parking procedures. Insist on more consistent requests for approvals by FBO for exceptions.
Do not own sufficient buffer land to control all tree obstructions via fee simple. Must rely on local zoning and overlying Florida statutes. Do not own 100% of future RPZ for Runway 11 or sufficient buffer for Runway 25 extension.	Facilitate safe and efficient air commerce.	Plan to purchase as opportunities arise. Look for alternative uses of land that may generate revenues. Explore partnering with other entities for land development or recreational uses compatible with airport operations and FAA regs.
Don't have backup to ASOS weather system when tower is closed.	Continue effort to Convince NWS to install secondary sensors.	Explore Utilizing AIP for redundant ASOS. May need to assume maintenance expense.
ATC hours do not cover all airline flights and potential delays. This means back-up weather observations to ASOS also not available.	Gain FAA approval to fund extended tower hours.	Submit formal request and request legislative support.
Some fence ditch crossings could be improved to better deter wildlife and avoid washouts/erosion.	Work the improvements into a future AIP project.	Airport staff to make more permanent improvements as resources permit.
Lack of improved/paved perimeter inspection road	Continuous improvement in airfield security in the most efficient manner.	GACRAA continue to make improvements to road grade, drainage and vegetation as permitting requirements and resources permit. Develop cost estimates and explore adding project to future CIP. Look for non-traditional sources of funding.
CC TV shadow areas exist in some public areas of the terminal. Some CCTV infrastructure is analog with poor video quality.	Continuous improvement in terminal safety and security in the most efficient manner. Add improvements to future grant/PFC approved terminal projects.	Prioritize and add new digital cameras in strategic areas. Use airport maintenance staff to max effect. Begin process of wiring old camera locations for digital using airport staff.
Trees in parking lot create shadows, debris and sidewalk heaves from roots. Tree ordinance is cumbersome and removal not popular. (New LED light fixtures have dramatically improved light levels and no further action is needed at this time).	Continuous improvement in terminal safety and security.	(New LED light fixtures have dramatically improved light levels and no further action is needed at this time). Monitor. Include tree trimming and lighting enhancements in future parking lot improvement project. Continue periodic sidewalk grinding and smoothing. GACRAA staff to do strategic tree pruning to improve lighting.
No CCTV or emergency call box capability in parking lot.	Continuous improvement in terminal safety and security.	Consider spare conduit capacity in parking lot revenue control system. Develop CCTV project for eventual FDOT funding. Explore wireless options now for limited but strategic camera locations and emergency call button system to 911.
Temporary maintenance staff may introduce some extra risk.	Perform at a high level of safety for all activities in an environment of continuous improvement.	Consistent education of employees on escort and access/work limits for all temporary employees. Continue to include temporary employees in all training events - FOD, safety meetings, etc.
ARFF station in need of replacement.	Continuous rehabilitation, replacement and improvement of key infrastructure as needed. Provide safe and efficient workplace.	Apply for AIP to replace ARFF station in new location per ALP and CIP.
Two original ARFF vehicles are getting older.	Would like to maintain Index B redundancy Maintain Index C capability and eventually achieve Index D for specialized charters.	Apply for AIP to replace two ARFF vehicles with one new, Index B vehicle per CIP.

Weaknesses	Goal	Objective/ Action Item
GRU Power Reliability.	Achieve self-sufficiency from GRU power grid for all critical airport operations for extended durations, including PBB's and terminal air conditioning.	Continue to harden airport and passenger information systems. Continue to maximize use of existing emergency generator capacity. Consider expanded emergency generator capacity with major terminal expansion project.
Police labor cost high vs. GACRAA employees	Provide high quality facilities and services in the most cost effective manner.	Discuss low/average pay contract model with city. Continue to look at other LEO options.
Fire Dept. coverage and training challenges due to union scheduling and city processes.	Facilitate safe and efficient air commerce. Perform at a high level of safety for all activities in an environment of continuous improvement.	City seems to have this better organized for now. Training schedules are meeting time limit requirements. Monitor.
Opportunities	Goal	Objective/ Action Item
SMS System chance to better formalize processes and expand safety culture	Perform at a high level of safety for all activities in an environment of continuous improvement.	FAA SMS requirement is now on hold. Begin draft and implement SMS basics to improve airfield maintenance risk assessment and action plan.
Increase in allowable Passenger Facility Charge (PFC)	Facilitate safe and efficient air commerce. Provide high quality facilities and services in the most cost effective manner.	Continue lobbying efforts to increase PFC in order to regain purchasing power lost to inflation. Consider engaging lobbyists from the City and UF to assist.
FAA Next Gen NAVAID improvements	Provide maximum utility of airport facilities to users. Facilitate safe and efficient air commerce.	Work with FAA toward infrastructure and obstruction criteria as necessary to take advantage of opportunities.

Threats	Goal	Objective/ Action Item
Loss of federal Contract Tower Program funding	Maintain and maximize ATC and weather services.	Continue to Lobby to preserve program
Decreasing AIP share of Aviation Trust Fund	Maintain safety and usability /enhance/ airfield infrastructure.	Lobby against trust fund diversion
Severe Weather /Hurricanes/High Lightning Area	Provide maximum safety and utility under all weather conditions and operating conditions including natural disasters.	Test surge suppression on R/W 7-25 and portion of T/W A lighting circuits under FDOT project. Monitor and lobby to gain mod to standards from FAA to install on other circuits under FAA. Continue to fine-tune tenant alerts for severe weather and action plan. Continue tenant outreach and education on securing hangar doors. Continue to refine weather alert checklist and notification system for Ops and maintenance. Improve emergency generator capacity at terminal. Install emergency generator at fuel farm. Continue to lobby for FDOT and FAA funds to install larger emergency generator at control tower.
EPA control of all wetlands and drainage ditches into surface waters of the U.S. for regulatory purposes. We already deal with three entities (city, state, USACE on wetland mitigation and permitting issues).	Preserve IMC minimums and maintain adequate safety buffer on approaches.	Monitor regulatory Changes. Organize and lobby to reduce new wetland impediments to obstruction removal, wildlife hazard habitat removal, safety area grading and safety related infrastructure.
Future tree growth around airport	Preserve IMC minimums and maintain adequate safety buffer on approaches.	Complete future tree management plan and MOU with City. Perform periodic aerial survey to positively identify obstructions and hot spots. Continue efforts to strengthen and enforce city hazard codes regarding tree removal. Continue to monitor and oppose changes in city code, state law and EPA regs. which reduce airport tree removal rights or increase expense. Purchase property in fee simple for airspace protection when prudent, i.e. R/W 11 Approach.
Increasing costs for City for airport fire and police or more cumbersome work rules.	Provide high quality facilities and services in the most cost effective manner.	Lobby City Commission against any increases. Explore privatization options or County options if needed.

SWOT Analysis and Action Plan

Strengths	Goal	Objective/ Action Item
Airport Authority is seen as an effective body regarding airport governance and oversight and is free from controversy.	Efficient and effective governance. Operate in a fiscal and socially responsible way.	Remain focused on airport related issues.
Airport Authority structure - Independent Special District - Allows airport to concentrate on its mission, move quickly and without undue political interference.	Efficient and effective governance. To operate in a fiscal and socially responsible way.	GACRAA succession - Board members assist in recruiting high quality replacements with GNV's and community's best interests at heart.
Gainesville Regional Airport facilities and services have greatly improved over the last 15 years and continue to do so.	To be model gateway for the community. To develop and maintain. quality, affordable facilities and services.	Continue plans for Terminal Phase II, II and IV expansion/improvements. Continue with developing plans for parking expansion or parking garage. Continue open communication with customers, stakeholders and employees to find areas needing improvement and to address them.
Good community support of airport and its mission - City Commission, etc.. Many more informed, cheerers than detractors.	To be the preferred airport for residents, businesses and institutions.	Develop positive, comprehensive PR and education campaign (<i>Fly Local?</i>) and unique branding. Continue press releases of positive developments, future plans, construction, new services, etc. Remain engaged with CCOM's, Chamber.
GACRAA staff has developed positive working relationships with city, county and community agencies.	All	Stay engaged, positive and cooperate on common goals.
Competing service by two major airlines - Reasonable, competitive fares under most advance purchase conditions.	Core Mission Goal - Convenient, economical, reliable air service.	Monitor fare and schedule changes. Maintain good communications. Express concerns and make recommendations.
Good network hub access (now 4!) with extensive national and international connections.	Core Mission Goal - Convenient, economical, reliable air service.	Continue to lobby for United service to open up additional hub and "strong city" destinations (ORD, IAH, IAD, EWR) . Assist AA in solidifying MIA and new DFW service. Additional AA opportunities will eventually be possible (DCA, ORD) as growth continues. Delta is heavily invested in ATL and has communicated unwillingness to overfly their southeastern hub.
Airline equipment improving - All jets, larger aircraft. More first class and business class options are favorable to those earning frequent flier perks.	Improve customer experience. To be preferred airport.	Install mid-level boarding bridges and prepare larger parking locations as planned in Terminal Phase II expansion (2019-2021). Continue to preserve follow-on expansion capability.
Dynamic University, professional, medical and Bio industries. Predominantly business market at GNV results in higher than average airline yields. These are needed to support profitable network service. High use of airline loyalty programs.	Maintain exiting air service and fiscal stability.	Continue to sell this as a positive opportunity for possible new entrants considering the GNV market. Higher fares attractive to new entrants and make it easier to support lower expected volume on new routes.
Good service acceptance among many business travelers due to ease and convenience.	to be the preferred airport. Provide maximum economic benefit and value.	Continue to refine messaging and explore new marketing opportunities to reach and to educate potential travelers. Develop targeted, industry and business specific marketing methods.
Good local weather - Few low IFR days during arrival times. Reduced disruptions during coastal hurricanes.	To be preferred airport. Provide safe and efficient air commerce.	Communicate benefits of locating in North Central Florida - for aircraft storage, maintenance and flight instruction, among others.
All airlines have RON aircraft on site for first daily departure. RON reduces morning cancellations due to wather.	Provide safe and efficient air air commerce. Reduce flight disruptions.	Stay focused and maintain dialogue with airline route planners on improtance of RON. Continue efforts to increase gates to accommodate more overnight aircraft.
Good working relationship with local airline managers, TSA and concessionaires.	Facilitate safe and efficient air commerce. Develop quality services.	Foster attitude of cooperation and teamwork. Do not get caught up in minutae or turf tug-a-wars. Respect chain of command. Continue good relations and regular meetings on important issues to stakeholders.
Delta renewed focus on monitoring customer service. GNV now mainline station.	Aspire to maximize customer satisfaction and repeat business. To be preferred airport.	Monitor Delta survey results and address short-comings. Renew interest in joint airport, airline and TSA customer service meetings and periodic training programs. Implement terminal wide customer service awards program, rewards, newsletter or other recognition.
Unprecedented legacy airline financial stability - Due to airline consolidation, fleet reductions, low fuel prices and strong economy.	Provide fiscal stability and reliable schedules. To be the preferred airport. Provide safe, efficient service.	Continue to lobby the airlines for service and schedule enhancements while times are good.

Strengths	Goal	Objective/ Action Item
Base of loyal customers. Established frequent flyer and voluntary low-fare alert subscription programs. Generally business savvy passengers who understand industry economics and service limitations, once explained.	To be preferred airport for businesses and institutions. Provide maximum benefit and value.	Continue outreach to customers and stakeholders through newsletters, events, speaking engagements, etc. Promote cost calculator use. Refresh Road Warrior rewards programs with new sponsors and rewards. Revive or participate in "Buy Local" campaign.
The airport has very few noise complaints from aircraft operations. The few noise complaints received are generally the result of unusual military aircraft or activity.	Become a model gateway. Operate in a socially responsible way. Facilitate safe and efficient air commerce.	Continue to actively defend current, protective ordinances. Work toward tightening up County compatible land use regulations by protecting to the 60 DNL level, same as City.
Energized and active business community. UF technology spin-off opportunities.	Operate in a fiscally responsible way. Become a model gateway. Promote quality services and facilities.	Participate in Innovation Gainesville and Chamber activities, as well as Commission EDC. Increase participation with Marion County and Chamber. Be vigilant for proposed, new developments and potential conflicts. Plan for purchase of additional buffer lands, particularly north and west of the airport.
Fairly stable, recession resistant economic base - UF, Government, Healthcare	Same as above.	Communicate benefits of stable economy to airlines and others. Continue to diversify revenue stream.
City of Gainesville and Alachua County have favorable Airport Hazard Zoning Ordinances and an intergovernmental cooperative agreement to protecting airspace from Part 77 obstructions.	Facilitate safe and efficient air commerce. Maximize airport utility. Operate in a socially responsible way.	Continue to monitor and evaluate proposed regulatory changes. Advocate for airport needs. Communicate economic impact and importance of GNV to community leaders.
City of Gainesville has favorable protections to ensure airport compatible land uses and minimize future noise complaints. Noise conflicts can work to hinder future airport development.	Facilitate safe and efficient air commerce. Maximize airport utility. Operate in a socially responsible way.	Continue to monitor and evaluate proposed regulatory changes. Advocate for airport needs. Communicate economic impact and importance of GNV to community leaders.
Major NCAA / SEC Sports draw - UAA Charter activities	Provide fiscal stability. To be the preferred airport. Provide safe, efficient services.	Monitor local sporting and other major events. Communicate possible increased demand to airlines for extra section or larger aircraft on key dates/times.
Professional marketing focus by GACRAA management. Good knowledge of airline industry and consulting resources. Recent True Market analysis and up to date sources of airline passenger data for region.	Promote new airline service. Provide maximum benefit and value. To be the preferred airport for all stakeholders.	Continue to participate in airline route planner conferences. Prepare brief marketing piece for specific, priority routes with data for distribution to airlines. Continue to solicit HQ visits from top airline prospects.
Good location with respect to major business in the greater Gainesville area and higher income zip codes. Very reasonable travel times. Far enough away from MCO, TPA and JAX to make an attractive option based on convenience.	To be preferred airport for businesses and institutions. Facilitate safe and efficient air commerce. To be preferred airport and model gateway.	Continue to do market research and targeted marketing to stem leakage and improve air service options. Continue to educate the general public and community leaders on the very positive aspects of the airport, its location and the economic impact to the community. Continue to support efforts to improve traffic flow within the community and transportation options to the airport.
Easy access to airport from city center and UF	Facilitate safe and efficient air commerce. To be preferred airport and model gateway.	Remind stakeholders of the value of this type of convenience to both inbound and outbound travelers. A less convenient location for some makes decisions on leakage more about price.
Convenient parking and passenger check-in.	Facilitate safe and efficient air commerce. To be preferred airport and model gateway.	Continue to find ways to improve the passenger experience, particularly with respect to comfort and convenience.
Reasonable TSA screening times on most flights. Now have second screening lane with Pre-Check.	Facilitate safe and efficient air commerce. To be preferred airport and model gateway.	Submit written request to TSA for increased screener hours, continuous checkpoint operations, dual check-in line and pre-check and eventual dual X-ray line. Install airline and customer information displays on TSA operating times. Continue efforts to encourage passengers to come early and go through screening immediately, when open.
Pleasant, well maintained terminal. Greatly improved aesthetics.	Develop and maintain quality, affordable facilities. To be the preferred airport and become a model gateway.	Complete ticketing upgrades 2014-15. Complete older restroom upgrades and restroom expansion in departure lounge.
TSA Staff generally friendly and knows repeat customers.	To be the preferred airport and model gateway.	Continue to communicate with TSA at joint management meetings and share passenger experiences. Maintain high level working relationships with TSA. Explore, joint, customer service training events, as done previously.
Electronic boarding pass capability added in 2014. TSA adds second screening lane and Pre-Check capability in 2018.	Facilitate safe and efficient air commerce. To be preferred airport and model gateway.	Continue to monitor TSA throughput and opportunities for improvement.

Strengths	Goal	Objective/ Action Item
Limited food, beverage and merchandise offerings vs. larger airports.	Promote and maintain quality, affordable facilities and services. To be preferred airport and model gateway.	New, roughed in vending location to be included in Terminal Phase II expansion project. Complete construction and solicit for vendor when passenger levels can support it or engage Tailwinds to expand offerings.
Free Wi-Fi available to passengers.	Promote quality, affordable facilities and services. To be preferred airport and model gateway. Provide maximum benefit and value.	Continue to upgrade bandwidth as usage requires. Remain open to new technologies and cognizant of changing digital landscape as it applies to airports. Engage with FAC IT Committee, AAAE, ACI, etc.
Good mobile telephone service available in terminal.	Promote and maintain quality, affordable facilities and services. To be preferred airport and model gateway.	Be engaged and be cognizant of unmet needs or new opportunities for mobile service enhancements. Continue to improve Wi-Fi bandwidth as needed. Complete installation of telephone fiber to terminal in 2019.
All major rental car brands -QTA Facility	Promote and maintain quality, affordable facilities and services. Provide maximum benefit and value.	Explore some rental car companies interest in providing covered parking paid through CFC program. Make preliminary cost estimate. Consider concept design and detailed cost estimates.
Bus service late morning through afternoon.	Provide affordable services. Provide efficiencies. Become a model gateway.	Communicate schedule needs/changes to RTS. Early morning departures not served by RTS.
Favorable FDOT grant program for improvements. FAA Entitlements and PFC program.	Promote fiscal responsibility. Provide affordable facilities. Facilitate safe and efficient air commerce.	Meet with FAA to bundle higher ranking, airfield discretionary eligible projects for early completion and banking of entitlements for terminal expansion work.
Fresh, attractive, functional web site - Cost Calculator	Promote quality facilities and services. Provide maximum value. Become a model gateway.	Schedule formal, periodic web site review (semi-annual) by staff to keep fresh, relevant, current and functional.
Large interest by Uber drivers for improved ground transportation opportunities.	To be preferred airport. Maximize economic benefit and value. Facilitate efficiencies. Provide affordable alternative services.	Consider improvements to TNC staging areas, perhaps include TNC's in future parking garage project.
Good connections to local City road network. Roads are fairly well maintained.	Facilitate efficiencies. Maximize benefit and value. To be preferred airport.	Advocate for road improvements being cognizant of how customers wish to travel to and from the airport vs. how others would like them to travel.
Existing state Highways serve the airport from all directions with links to surrounding communities as well as I-75.	Facilitate efficiencies. Maximize benefit and value. To be preferred airport.	Advocate for I-75 improvements and alternate connector roadways within GNV's primary catchment area.
Stable, mature, well trained, airport work force. Low turnover.	Provide efficiencies and promote fiscal stability. Maintain safe, quality facilities and services.	Continue to assist employees in meeting their workplace goals. Identify and provide for needed environmental improvements, training, fellowship, accomplishment, professional growth and other rewards.
Weaknesses	Goal	Objective/ Action Item
Three Large, Competing Airports with high percentage of leisure fares, LCC's and ULCC's (MCO, TPA, JAX) as well as growing ULCC service at S - High leakage rate, particularly as you move outward.	Be preferred airport. Maximize efficiencies and value. Become a model gateway to the community. Affects fiscal stability.	Be the best and get better every day. Design comprehensive marketing campaign around a single theme/branding to raise awareness and build buy local loyalty. Continue to communicate the offerings and advantages of GNV.
Smaller city/market size - Large student and lower income population.	Affects ability to draw new service at attractive yields. Affects ability to retain existing service at affordable rates. (maximize benefit and value). Affects fiscal stability.	Monitor fares and communicate larger inequities with company product at competing airports to carriers. Compete on quality of experience and convenience. Be the best at that and get better every day.
Low Manufacturing base. Proportionally high government employment - Not traditionally high consumers of air travel.	Affects ability to draw new service at attractive yields. Affects ability to retain existing service at affordable rates. (maximize benefit and value). Affects fiscal stability.	Target and identify key industrial users and tailor specific marketing for their air service business, i.e. digital brochures targeted to them and their major customers that visit. Expand Geo fencing of their facilities for digital advertising. Examine posting, likes, etc. on their Facebook pages, etc.
Some in region still do not know the air service options available from GNV, particularly "occasional" flyers.	Become preferred airport. Maximize service offerings and value.	Refine advertising and promotional mix. Explore more effective use of digital advertising and social media. Require better performance metrics from advertising partners for most efficient use of GNV dollars.
Local land development regulations, stormwater and utility requirements perceived as restricting growth. Little investment in infrastructure to support continued growth. City has adopted a "developer pays" philosophy.	Affects ability to draw new service at attractive yields. Affects ability to retain existing service at affordable rates. (maximize benefit and value). Affects fiscal stability.	Promote and help to steer growth in areas around the airport. Remember that bigger is not always better. Promote GNV quality of life and community. Strive for improvements that improve quality of life and efficiencies.
County and City governments general opposed to future road widening and capacity enhancements. Prohibition against stream crossings deter future connector roads.	Improve efficiencies and value. Improve customer experience. Become a model gateway to community. Maximize potential.	Promote road improvements that improve efficiencies. This improves quality of life.

Weaknesses	Goal	Objective/ Action Item
Several school zones slow traffic approaching the airport from I-75 from the west (SR222) and the southwest (SR24). Traffic from outlying areas and on to local roads in the vicinity of the airport can be problematic, particularly during rush hour.	Improve efficiencies and value. Improve customer experience. Become a model gateway to community. Maximize economic benefit/potential.	Engage MTPO on continuous improvement of road efficiency. Promote consideration of elevated cross-walks or other engineering solution to improve safety and efficiency of school zones.
Airport has large amount of wetlands on current site, relatively poor soils in many areas and seasonally high water table. Dry stormwater detention and treatment is challenging and requires significant use of available land.	Maximize economic potential. Develop quality affordable facilities. Operate/develop in a socially responsible way.	explore benefits of a storm water masterplan to maximize use of available land. Execute planned drainage improvements. Look outward for property acquisition over time.
Airport site has former DOD dump site and various former civilian spill sites that must be cleaned and hinder development of available land.	Maximize economic potential. Develop quality affordable facilities. Operate/develop in a socially responsible way.	DEP contracts to address three sites are anticipated in 2019. City municipal landfill has been capped. No further opportunity there. Former DOD sites are on list. Monitor progress. Look outward for possible future land acquisition.
Relatively Low demand for stand-alone, high value air freight services. Some quality, belly freight demand, however (live fish, live animals, organs and tissue, misc. biologics, medical devices).	Maximize economic benefit and value. Be preferred airport for high value freight. Develop quality services.	Continue to communicate with Chamber, Innovation Gainesville, UF OTL on needs, monitor volume and explore/involve airlines with opportunities for belly freight.
Slow to moderate population growth expected for region. Lower than average median income. Aging population.	Affects ability to draw new service at attractive yields. Affects ability to retain existing service at affordable rates. (maximize benefit and value). Affects fiscal stability.	Stress convenience and simplicity for older travelers. Develop programs to target older travelers and reduce their travel burden. I.e. expand airport/airline wheelchair assistance program.
Gainesville not traditional Florida resort market - No Beach or major tourist attractions. Competing with LCC and ULCC tourist driven carriers at major resort locations.	Affects ability to draw new service at attractive yields. Affects ability to retain existing service at affordable rates. (maximize benefit and value). Affects fiscal stability.	Continue to push Alachua VCB for joint marketing to raise GNV awareness. Push for increased ecotourism and medical tourism efforts. Support larger convention center for conferences, major music acts, sporting events, etc.
Airport distance to I-75 can be inconvenient. Feeder roads subject to increasing local traffic congestion. No expressway to the airport.	Improve efficiencies and value. Improve customer experience. Become a model gateway to community. Maximize economic benefit/potential.	Address comments and concerns to City /County Commission and MTO to affect future plans. Explore opportunities to use FDOT SIS and other funds for road capacity improvements.
Lack of local convention center for larger, regional meetings.	Maximize economic potential. Attract new air service to be preferred airport. Help Build prosperous communities.	Continue to support efforts to locate convention center close to GNV. Develop relationships with local, large meeting and sporting event organizers. Search out joint marketing opportunities or new advertising opportunities to target inbound participants.
Market size not convincing for many direct flights or LCC's	Provide maximum economic benefit and value. Be preferred airport for all users.	Continue dialog with LCC's at any available opportunity. Continue to engage TDC and others on tourism development. This will likely be niche tourism for the near-term. Market/educate passengers to consider cost of carry-ons, baggage fees etc. in making cost calculation. Add to cost calculator?
No "Low cost" carriers present locally. Results in higher than average leakage to MCO, TPA, Jax and others.	Provide maximum economic benefit and value. Be preferred airport for all users.	Continue to promote the benefits of GNV service options for potential users. Focus on non-fare benefits like convenience and low hassle factor vs. large airports. Make clear comparisons, use tools like cost calculator.
Higher than average fares for region.	Provide maximum economic benefit and value. Be preferred airport for all users.	Spend additional resources to improve monitoring for non-competitive fares on a route by route basis and lobby incumbent airlines for changes. Continue to focus marketing efforts on non-price advantages of GNV and use of "total cost" fare calculator. Continue to solicit United for service to improve competitive climate, however, higher than average yields are crucial to regional markets like GNV. Monitor fleet and market strategy of LCC's and continue to look for opportunities to lure to GNV.
Smaller aircraft and turboprops not popular with some travelers. Turboprops may be more fuel efficient but more susceptible to severe weather due to operating at lower altitudes.	Be preferred airport for all users.	Market to change perceptions of modern turboprops if carrier opportunity is presented. Major carriers have been shedding turbos and generally upgrading RJ's over time.
Fewer network carriers to solicit for service due to mergers and consolidation. Only three standing. We have two.	Improve airline service options and competition. Maintain and improve airport financial health and fiscal stability.	Continue efforts to lobby for United service. Continue to keep airport costs attractive for incumbent carriers and potential carriers. Improve facilities for new carriers in Terminal Phase II and IV.
Smaller markets more fragile and sensitive to changes in service frequency and airline decisions.	Maintain and improve airport financial health and fiscal stability.	Continue to make low cost fuel options available to carriers through operation of common fuel facility and monitor and negotiate favorable into plane rates with UAC. Stress service frequency for better utility vs. larger aircraft with airlines. Some business travelers find being able to use first class upgrades and being able to use benefits of their loyalty programs local to be important.

Weaknesses	Goal	Objective/ Action Item
Weather disruptions and congestion at Atlanta hub and Charlotte - Delays and cancellations.	Customer service. Improve customer experience.	Continue to pitch direct flights to top cities (i.e. NY, DC, BOS, and new hub service ORD, HOU/HIA, EWR)
Airlines have no company mechanic support available locally. Additional likelihood of longer mechanical delays or cancellation.	Customer service. Improve customer experience.	Address further with UAC to identify and correct any service or availability deficiencies.
Limited marketing funds available.	Increase airport awareness and education on benefits. Be preferred airport for all users.	Engage media partners regarding PSA's. Step up press releases and events for additional, "free" advertising where practical. Continuously refine advertising expenditures to most targeted and most efficient.
TSA screening -TSA FTE's reduced due to budget and (misplaced?) TSA priorities. Second screening lane/pre-check not in use for all flights. Screening large aircraft departures can be slow without second lane.	Improve airline service options and competition. Customer service. Improve customer experience.	Engage TSA and legislative assistance as needed to increase FTE's and more consistent usage of second screening lane and Pre-Check option.
Terminal cramped during peak times and overlaps due to scheduling or delays. Should be adequate, growth potential of present site for long-term.	Improve airline service options and competition. Customer service. Improve customer experience.	Two-gate expansion planned for Terminal Phase II project, 2019-2021. Should be adequate, growth potential of present terminal site for long-term.
Inadequate restroom capacity in sterile area, particularly when departures are scheduled close together or during IROPS.	Customer service. Improve customer experience.	To be addressed in Terminal Phase II Project - 2019-2021. Should be long-term solutions.
Terminal gates closely spaced - Problematic as aircraft size gets larger. No separate gate/parking area for Silver. Could use additional apron area, particularly during charter operations.	Improve airline service options and competition. Provide efficient facilities and services.	Mid to long-term growth potential should be afforded by Terminal Phase II project (2019-2021). Maintain expandability of terminal. and monitor airline and local economic trend for timely expansion.
Passenger deplane quickly to baggage claim but baggage takes several minutes longer as ground crew will first load and marshal outbound flight. The impression from the passenger is that they are waiting much longer than they are and not knowing how much longer the process will take causes stress. Airlines often have short staff. Airline SOP is to load all outbound passengers and bags before delivering inbound bags, particularly when staffing is low.	Customer service issue. Improve customer experience. Become preferred airport for all users.	Airport has installed active digital signage with average wait times and count-down timer displayed to better inform passengers. Use by airlines has been sporadic. Intensify requests for airline personnel to use bag info system and make a well-timed announcement on bag claim statue and where to go if bag is not on belt.
Inadequate airline ticket office space for new entrants.	Improve airline service options and competition. Provide efficient, affordable facilities and services.	To be addressed in Terminal Phase IV Project (2021-2023) if finances permit. Would go to two to four airline office suites with outbound bag belt access to all counter positions. Can possibly be completed in two phases, if required. This is a mid to long-term improvement.
Outbound bag conveyor does not service all airline locations. EDS machine is in lobby and takes up needed space.	Improve airline service options and competition. Provide efficient, affordable facilities and services.	To be addressed in terminal Phase IV project - 2021-2023, finances permitting. Complete current concept study and plans to fully fund improvements as scheduled.
Pay parking lot capacity occasionally not adequate during peak demand. Parking capacity is now a primary growth restrictor and will affect customer attitudes during peak travel seasons.	Customer service. Improve customer experience. Maximize revenue and fiscal stability.	Constructed interim expansion to pay parking lot per CIP in 2018. Peruse and maximize use of FDOT funding for future parking garage in 2020-2022. 500-600 car garage should provide for mid to long-term growth.
No covered parking options available or covered walkways.	Improve customer experience. Become preferred airport for all users.	Pursue parking garage with covered walkways into terminal per above.
Aesthetics of pay parking lot. Landscaping and general condition is improved but still substandard. Striping substandard. Tree roots causing sidewalk damage and block lighting. (LED's have helped greatly!). High space demand does not allow planned parking lot rehab.	Safety. Improve customer experience.	FDOT funds received for partial lot rehabilitation. Complete repaving and landscaping and sidewalk improvements as soon as other surplus parking (garage) is established.
Cell phone lot capacity does not meet increasing demand for space. The configuration of the lot is not optimal for ease of use. Customers often park on paved right-of-way during peak arrival times.	Customer service issue. Improve customer experience.	Work with rental cars to convert some of the rental car overflow parking to cell phone in 2019 as short to mid-term solution. Construction of parking garage will make portions of the existing paved lot available for cell phone lot or rental car return. Parking revenues are, however, the airports most critical source of revenue at this time.
Employee auto parking lot at capacity. Employees periodically displaced to meet airline passenger parking demand. Poor conditions of employee parking area during wet weather.	Maintain employee morale. Provide quality, affordable facilities and services.	relocate employees to portions of existing pay surface lot or unused portions of future parking garage once parking garage is constructed. Improve grass parking lot in the interim and allow employees into overflow lot during slower seasons as long as possible.
Terminal air-conditioning and jet bridge movement are not on emergency power generator.	Customer Service Improvement. Ensure flight on-time reliability. Provide quality, efficient, facilities and services.	Jet bridge movement to be included on new generator in Terminal phase II (by 2021). Bridges can continue to be moved with tow vehicle during power failure.

Weaknesses	Goal	Objective/ Action Item
Fewer amenities in terminal - services, food choices, apparel, etc.. No secure-side per relief area. No dedicated mother's lactation space. Children's play area desirable but insurance implications. Prayer/Reflection Room, desirable.	Improve customer experience. Become model gateway. Operate in a socially responsible way.	Regional airport with zero local connections and limited passenger dwell time. Complete water service improvements (Terminal Phase I) to support additional food and beverage options. Plan for additional vendor capability with Phase II terminal concourse expansion. Viability of additional vendor(s) will depend upon traffic levels. Work with existing vendor to improve menu and service offerings as needed.
No full-time, private sky capping services	Customer service issue. Improve customer experience. Become model gateway. Be preferred airport for all users.	Continue to dual-use custodial personnel whenever resources permit and as allowed by airlines. Increase resources as needed. Continue to prod airlines to share in hiring of Skycap for baggage and additional wheelchair assistance. Alternatively, airport hire staff and charge back airlines in increased rent.
American Airlines defers personal service of special needs, wheelchair bound passengers to airport due to staff availability. Delta has scarce resources to provide for wheelchair assistance but policy no longer allows for airport assistance.	Customer service issue . Improve customer experience. Become model gateway. Be preferred airport for all users.	Same as above.
Lack of fiber optic data service to terminal. Limited to coaxial cable service and T1.	Provide quality, efficient, facilities and services. Improve customer experience.	AT&T fiber service being installed in early 2019. TSA to be first customer. GRUCOM discussing terminal connection options. Keep tenants updated on progress and potential opportunities for enhanced service.
Terminal lacks bag cart circulation space, covered GSE space, interior storage space, flexible office space. Some surplus space is needed for airline opportunities and additional vendor/revenue opportunities, when presented.	Provide quality, efficient, facilities and services.	Complete concept planning for Phase IV Terminal Improvements. Project includes new Bag Handling System to connect to all counter locations. Plan
Airlines shut down counters 30 min. prior to flight time. Not available to rebook late arrivals or deal with baggage issues during that time.	Customer service issue. Improve customer experience. Become model gateway. Be preferred airport for all users.	Continue to push airlines for common use customer service personnel for rebooking and baggage service when counter is closed. Continue to push Airlines to participate in automated assistance/paging kiosk and be consistent in usage of system.
Delta no longer on airports customer assistance paging system (kiosk). Provides critical communication when airline personnel are not at the counter.	Improve customer service and experience. Be preferred airport for all users.	Airport has met with Delta Corporate on issue (1/2019). Phone provided. Delta will not implement but is addressing staffing levels. Monitor.
Airline passenger communication and customer service focus inconsistent.	Improve customer service and experience. Be preferred airport for all users.	Continue to focus on customer service in monthly airline manager's meeting. Reintroduce joint customer service and communications programs if airlines are receptive.
No lost baggage office for airlines. Airlines do not welcome airport assistance on lost baggage. Insist customers go through busy 1-800 assistance line. This causes passenger frustration.	Improve customer service and experience. Be preferred airport for all users.	Consider web-site enhancements to improve education of passengers and to make contact with airline customer assistance easier. Consider lost bag office in future bag claim expansion. Reach out to airlines on technology and signage solutions to better serve passengers. Continue to provide a "helping hand" and sympathetic ear to passengers contacting us and assist when possible without circumventing airline protocol.
Airline agendas not always the same as the airports. Airlines not generally interested in market development and some local customer service initiatives. Legacy airlines seem more focused on high yields and high value customers vs. volume.	Improve customer service and experience. Be preferred airport for all users. Provide community maximum economic benefit and value.	Continue to expand general marketing of airline service. Use GNV sponsored airline market data and other sources to better target advertising dollars for those customers that value simplicity and convenience. Continue to approach airlines about cooperative advertising opportunities.
High utility rates, storm water fees, fire and police services fees, increasing medical insurance costs. Challenge to keep airline cost per passenger low if market does not continue to grow.	Provide community maximum economic benefit and value. Develop affordable facilities and services.	Continue efforts to lobby against new taxes masquerading as fees. Be mindful of FAA prohibited revenue diversion. Explore outsourcing fire and police at some point, if negotiated city pricing policies become problematic. Maintain good relations. Continue efforts to economize without affecting safety or long-term asset values. Continue to explore energy efficiency gains and new sources of revenue.

Weaknesses	Goal	Objective/ Action Item
Airport has significant debt load due to Eclipse and T-hangar projects. Further borrowing for parking improvements or in advance of PFC collections for terminal improvements is undesirable. Forecasting future airline revenues can be risky in small markets.	Operate in a fiscally responsible way. Provide community maximum economic benefit and value. Develop affordable facilities and services.	Continue to maximize grant funds, PFC and CFC for capital improvements. Pay as you go and save for a rainy day with operating funds. Be judicious in spending and investing in new projects. Safety first. Preservation of key assets second. Focus on projects that significantly improve customer experience and will create additional net revenue third.
Tight job market increasing competition for skilled workers. Labor costs to attract qualified candidates for all workers is increasing.	Provide community maximum economic benefit and value. Develop quality, affordable facilities and services.	Expand investment in worker education. Continue to maintain open dialogue with employees and encourage sharing of their ideas. Expand opportunities for job enrichment. Improve physical working conditions. Continue to make investments in tools and equipment to increase safety, efficiency and morale. Continue to improve pay across all job classes vs. market average.
Airport Authority has no taxing authority and limited safety net to deal with a financial crisis, i.e. loss of major airline service, loss of major tenant or general economic downturn.	Operate in a fiscally responsible way. Develop quality, affordable facilities and services.	Continue efforts at spending efficiency and search out new opportunities for revenue. Continue to pay down debt and increase reserves while prioritizing projects and maximizing outside funding sources for capital improvements. Invest in what the customer wants in the most efficient way possible.
Uber has greatly weakened local taxi business. It is difficult to keep enough taxi's in queue sometimes as taxi demand is sporadic.	Operate in a fiscally responsible way. Develop quality, affordable facilities and services.	Lobby state legislature through FAC for lower charges to taxi companies required to be on station vs. TNC's. Assist in increasing awareness of local taxi option to bolster taxi business. Continue to work to upgrade appearance and service level of taxi operators, via agreements and periodic meetings and training programs, when able. Consider raising TNC rates.
Eclipse hangar is under utilized. FAA limitations on use of hangar for non-aeronautical purposes. Hangar door width and height severely limit options for large aircraft.	Operate in a fiscally responsible way. Develop quality, affordable facilities and services.	Continue to market hangar for single tenant or joint tenant operations. Continue to explore hangar modifications to widen its appeal.
Lack of skilled, aviation workforce. Competing for MRO interest with Jacksonville, Space Coast, Panhandle and South Florida, where large DOD presence, existing aerospace industry, NASA exist.	Operate in a fiscally responsible way. Develop quality, affordable facilities and services.	Continue industry event marketing efforts. Work with FDOT, Enterprise Florida, UF, local CEO and others to compete for available opportunities.
Lack of surplus aviation facilities, particularly vs. former military bases in other regions (excess runway length, excess concrete apron, large height/width hangars and related infrastructure)	Operate in a fiscally responsible way. Develop quality, affordable facilities and services.	Continue industry event marketing efforts. Continue to plan and work with FDOT and FAA to fund basic expansion infrastructure to facilitate new hangars and aprons. Explore construction of spec facilities.
The airport has only one, full service FBO. Competition is usually helpful in ensuring competitive pricing, service and quality facilities, so long as there is sufficient economic base to support more than one, quality operation.	Operate in a fiscally responsible way. Develop quality, affordable facilities and services.	Management continues to make opportunities available for a second FBO and land exists for future FBO investment. While the single FBO appears to be very profitable at this time, management is not convinced there is sufficient business activity currently to support two, quality operations. Both entities would need sufficient revenue and resources to survive periodic recessions. Management has included some price controls in the revised FBO agreement and spot checks pricing from time to time to make sure GNV remains competitive. Additional resources should be applied to this task. Future investment in taxiways and aprons specifically for a second FBO should be planned for and made at the appropriate time. Revisit requirements of Minimum Standards document periodically to ensure they are not overly restrictive. GACRAA should continue keeping an option open for running the FBO or providing certain services itself. This is successful at many airports, i.e. NAPLES.
FAA forecast of small airplane growth weak. Aging pilot population and rising cost of pilot training and aircraft ownership.	Operate in a fiscally responsible way. Develop quality, affordable facilities and services.	Work to keep cost of hangar rental down. Monitor local fuel and mechanical service prices vs. other airports in the region. Work with FBO on GA promotional events.

Weaknesses	Goal	Objective/ Action Item
The airports fuel storage capacity can be taxed at times, particularly during special events. Aviation fuel must be allowed to "settle out" in storage before delivery into aircraft can be made. The frequency of fuel deliveries is now up due to economic growth.	Operate in a fiscally responsible way. Develop quality, affordable facilities and services.	Expansion of the fuel storage facility is included in the CIP. This project may need to be moved up to give additional storage capacity and more easily manage settlement times during peak demand. This will aid in avoiding any future fuel shortages and provide some redundancy during fuel farm maintenance. While fuel availability as a result of power failure has not been an issue, installation of a backup generator for the fuel facility is a priority in 2019.
Aging airport work force. Many senior workers will be retiring within the next 1-5 years.	Operate in a fiscally responsible way. Maintain safety and service levels.	Plan for orderly hiring and training of replacements prior to retirements. Consider job redesign where appropriate to gain efficiencies.
Continued and increasing reliance on digital technologies industry for airport systems. Software stability/patches, cyber threats, service demands are increasing. Growing reliance on outside contractors for maintenance and operations in all departments.	Operate in a fiscally responsible way. Maintain safety and service levels.	Explore hiring in-house IT staff. Consider segregating /expanding contracts to maintain digital assets and upgrades.
Opportunities	Goal	Objective/ Action Item
Better than average growth occurring in some sectors of local economy. A large amount of new retail construction is occurring in Alachua County. Marion County growth expected to exceed the state average.	Be preferred airport. Maximize efficiencies and value. Become a model gateway to the community.	Expedite needed terminal capacity improvements and misc. facility improvements. "You don't get a second chance to make a first impression". Strengthen marketing and outreach efforts in Marion County, northern Marion, particularly. Direct outreach to major employers and air travel users. Work with those with which we have mutual goals, and continue to develop positive relationships with all.
Energized, coordinated business recruitment efforts by UF, Business Community and local governments. Continued success with UF technology spin-offs likely.	Be preferred airport. Maximize efficiencies and value. Become a model gateway to the community.	Enhance efforts to maintain open communications and good relations with UF decision makers. Continue to lobby for UF presence on GACRAA Board. Make accommodations to streamline UF use of facilities, i.e. WIFI access. Market advantages and need to buy local to UF travel purchasers.
UF promotion of study abroad program and faculty exchange may increase demand for international travel.	Be preferred airport. Maximize efficiencies and value. Become a model gateway to the community.	continue to work with intl. student groups to foster use. Partner with TSA and airlines to see how we can better accommodate. Explore deficiencies in language or culture which we may overlook, i.e. signage, language problems or missing food items or services.
UF increasing faculty by approximately 500. These are traditionally higher consumers of air travel.	Be preferred airport. Maximize efficiencies and value. Become a model gateway to the community.	See how we can reach out and welcome new faculty. Approach with special offer on first-time parking? Show them how to make the most of GNV travel benefits.
Growing interest in large, local convention facility. May eventually boost number of out of state visitors.	Help build prosperous communities. Provide air services for maximum economic benefit and value. Become a model gateway.	Continue to be supporter of a facility that will draw regional or national events and stimulate air service demand.
Delta has made GNV a mainline station with larger narrow body airliners in the schedule. Opportunity for new counter services, aircraft first class amenities and improving the airports brand.	Facilitate efficient and affordable air services. Become a model gateway.	Up gauge facilities and staff to efficiently handle larger aircraft.
Grants received for parking improvements. Opportunity for state of the art systems to improve customer experience and reduce labor costs.	Improve service and efficiencies. Create a first-class facility - quality and affordable. Become a model gateway.	Rehabilitate parking areas, improve sidewalks, lighting and landscaping. (Will need to delay until expanded parking options constructed).
Terminal expansion may create new opportunities for main line servicing, improve passenger experience and create additional excitement about flying locally.	Improve service and efficiencies. Create a first-class facility - quality and affordable. Become a model gateway.	Complete planned terminal expansion and renovation. Effectively market new improvements and amenities.
Some interest in rental car operators to use CFC collections for covered fleet parking. Further opportunity to enhance the customer experience.	Improve service and efficiencies. Create a first-class facility - quality and affordable. Become a model gateway.	Explore partnering with rental car companies to share expense (through CFC) of new parking garage for car pick-up at least until passenger car demand catches up.
Congress and Administration considering higher PFC collection authority up to \$7.50 per passenger. If eventually passed, potentially more resources for improvements.	Operate in a fiscally responsible way. Improve safety, service and efficiencies. Become a model gateway.	Coordinate with airlines and FAA to PFC fund projects with lower priority for FAA discretionary or entitlement funding. Consider projects that expand passenger capacity and comfort.
High value air freight or express mail services for growing local biotech industry.	Facilitate air commerce to build prosperous communities.	Monitor airfreight demand and needs of key employment sectors. Maintain communications with air freight and package providers for opportunities to provide needed infrastructure or facilities for lease.

Opportunities	Goal	Objective/ Action Item
DCA/BWI, ORD or NY direct service - Must make an opportunity as current numbers show significant market dilution due to large number of competing airports on both sides.	be the preferred airport for NCFL. Market to our strengths.	Continue to build on success of DFW. Advertise and continue to solicit airlines for new service. Reach out to companies in region for air service preferences and GNV commitments. Solicit for travel bank and/or SCASD grants when appropriate.
High leakage rates per True Market and Leakage studies offer market potential. Airlines have an opportunity to capture lost traffic that is lost to competing airlines at JAX, MCO and TPA.	Facilitate air commerce to build prosperous communities. Promote quality, affordable services. Enhance airline marketing activities. Maximize GNV economic benefits to stem leakage.	Continue to visit airlines and stress opportunities due to high fare potential and leakage recapture. Stress high yield GNV market also ability to better maximize existing AA and DL investment in GNV.
Little business development occurring east of the airport. Plum Creek large scale development denied. Would have been convenient to the airport with potential to significantly increase commercial passengers.	Facilitate air commerce to build prosperous communities. Operate in a socially, responsible way. Diversify revenue stream to operate in a fiscally responsible way.	Support efforts for smart growth opportunities within the county and creation of large convention and event facilities. Help to spur interest in creating new industrial park facilities in proximity to GNV.
Increase in allowable Passenger Facility Charge (PFC)	Facilitate safe and efficient air commerce. Provide high quality facilities and services in the most cost effective manner. Become a model gateway.	Continue lobbying efforts to increase PFC in order to regain purchasing power lost to inflation. Consider engaging lobbyists from the City and UF to assist.
Further airline consolidation and capacity reductions always looming. Weaker than expected domestic growth, military and trade conflicts leading to a soft world economy always a concern for continued GNV growth.	Facilitate air commerce to build prosperous communities. Operate in a fiscally responsible way. Maintain safety and service levels.	These are business decisions generally beyond the control of GNV. Airport costs are only a small part of route operating costs (generally 5-6%). Continue efforts to provide high value facilities for airlines at reasonable cost. Continue plan for attractive, efficient terminal and parking facilities that are valued by passengers. Identify best opportunities for non-aeronautical development to supplement commercial passenger related revenues. Enhance various marketing efforts to reach new passengers, accentuate GNV benefits and reduce leakage.
Number of airports with commercial service is expected to continue to shrink. Some smaller communities at risk.	Facilitate air commerce to build prosperous communities. Operate in a fiscally responsible way. Maintain safety and service levels.	Same as above.
Increasing competition from LCC's and large aircraft economies of scale present at JAX, MCO and TPA. A-380 international service at MCO. Large investment in increasing capacity at MCO and TPA. New renovation project announced at JAX to improve customer experience.	Improve service and efficiencies. Facilitate air commerce to build prosperous communities. Operate in a fiscally responsible way.	Continue to accentuate the positive about GNV and complete projects to enhance efficiencies and customer experience. Work with airlines to identify less competitive fares and correct. Enhance various marketing efforts to reach new passengers, accentuate GNV benefits and reduce leakage.
Emergence of convenient, economical, alternative ground transportation to large hub airports. (ala Megabus?)	Operate in a fiscally responsible way.	Monitor competing ground transport alternatives.
New competitors for regional Air Service - i.e. any attempts for new Ocala service may serve to further dilute the GNV market although continued major leakage to MCO and TPA is inevitable. Ocala has generally been thought to be too close to Orlando to support significant, reliable.	Facilitate air commerce to build prosperous communities. Operate in a fiscally responsible way. Maintain safety and service levels.	Continue efforts to make facilities and service improvements from GNV. New DFW service will further increase airport options and utility. Strengthen marketing efforts in Marion County to improve GNV service awareness. Make GNV the preferred airport in surrounding counties for fast, convenient and affordable service. Any scheduled Marion service would likely be hub service on existing network carriers. Airlines are resistant to competing with themselves. In general, service to smaller communities has been contracting. At some point, Marion County may make a business case for new commercial service if higher than average growth, particularly in the northern part of the county continues. Ocala is building a new general aviation terminal. Commercial service would require significant investment in parking and terminal expansion/modification. Minor improvement in ARFF services will also be necessary. Other airport facilities adequate to support commercial service.
Airline scheduling and service decisions at GNV, particular MIA. Small schedule changes/reductions in service or hub elimination can have drastic financial effects for regional airports. These decisions are generally beyond airport control.	Facilitate air commerce to build prosperous communities. Operate in a fiscally responsible way. Maintain safety and service levels.	Continue to maintain awareness of industry trends and positive dialogue with airline route planners and decision makers. Enhance marketing efforts promoting MIA when able.
Jet fuel cost spikes affect regional jet profitability most. Regional Jet cost per passenger must remain viable. 50 seat RJ's were to be retired but are on borrowed time due to lower than expected fuel costs.	Same as above.	Keep open dialog with airlines on contemplated service changes. Continue to fine tune marketing efforts and attract higher yield passengers to GNV convenience. Must build traffic to make larger regional jets and narrow-bodies viable on all routes.

Opportunities	Goal	Objective/ Action Item
Airline pilot/cabin crew labor agreements. RJ cost per passenger must remain viable.	Same as above.	Airline pilot shortage continues to negatively affect regional air carriers. Demand for increased wages at Regionals will continue to rise. Must focus Congress on the "barriers" problem.
Increasing TSA and FAA regulatory burden and increasing costs. Regulations aimed at both airports and airlines are a potential threat, i.e. see below.	Same as above.	Previous Congress and current President have been opposed to any tax increases. New Congress or future Administration may be less sympathetic to airline profitability.
Growing air carrier pilot shortage due to economic growth, FAA experience and crew rest requirements have affected crew availability for some GNV flights.	Same as above.	Continue to work with industry advocacy groups to reduce current barriers and additional expenses related to pilot training. Regional airlines depend on a steady supply of new pilots.
Increased taxes and fees on airlines and air passengers - May affect affordability and passenger demand.	same as above.	Lobby legislators and assist advocacy groups to keep fees reasonable and productive to improve airport capacity and maintain critical infrastructure.
Low wages for regional airline ramp/counter personnel result in high turnover and shortages. Regional airline staffing and travel benefit reductions expected in 2019.	Improve customer service and maintain safety and efficiencies.	These factors are combining to reduce the attractiveness of airline employment at GNV. Labor shortages and reduced staffing have already caused limited flight delays and failure to check-in passengers arriving close to the thirty-minute deadline. Turnover and training appear to be a problem that affects efficiency. We will continue to forward service complaints to the airlines and urge full staffing. Loss of travel benefits seems ill advised when low wages and recruitment already seem to be a problem. Begin to explore possible facilitation of third-party contract for below and/or above the wing joint airline servicing agreement, if looked upon favorable by the airlines.
Increasing utility costs, and local stormwater fees.	Operate in a fiscally responsible way. Keep airport operating fees attractive to airlines and tenants.	Explore alternate power options as technology improves, leverage available grant funding. Continue efforts to improve energy efficiency. Monitor any attempts to increase stormwater and fire impact fees or other new fees and mitigate or protect against.
Ballooning GACRAA healthcare costs and other expenses beyond airport control. Need to keep airline cost/passenger reasonable.	Operate in a fiscally responsible way. Keep airport operating fees attractive to airlines and tenants.	Continue to explore additional ways to slow down the cost of healthcare premiums. Previous efforts have included higher, self-funded deductibles and "risk sharing" with other government entities. Encourage employees to investigate various options for healthcare and prescription medications make informed purchasing decisions.
Federal efforts to cancel FAA Contract Tower Program - If successful, may reduce or eliminate air traffic controllers. Commercial service airports like GNV should be at lower risk vs. GA firs.	Maintain safety and service levels. Operate in a fiscally responsible way.	Congress has presently mitigated this threat and is fully funding the Contract Tower Program. Federal pilot program to study use of consolidated, remote towers as an alternative for some airports is underway. Monitor any new efforts.
Non-compatible adjacent land uses - Hatchett Creek. Potential conflicts due to residential use and obstructions.	Maintain safety and service levels. Facilitate air commerce to build prosperous communities.	Interest in developing the property seems to have subsided for now. The property is up for sale. New owner may well re-energize efforts to build high density housing close to airport runways. Re-suggest joint effort with City to purchase and protect the property. Program PFC /FAA as eligible and FDOT funds in JACIP if parties show interest.
Growing use of TNC's like Uber and emergence of self-driving cars	Operate in a fiscally responsible way. Keep airline and tenant costs low by preserving growth in parking and rental car revenues.	Convenience and relatively low cost of TNC's makes them attractive to more and more outbound passengers, and not just Millennials. Parking by outbound passengers is the largest source of airport revenue. Rental car concession fees is the largest source of revenue from inbound passengers. Consider significantly raising TNC fees. Taxi fees must be the same by law. Development of non-aeronautical revenue sources may become more important. Consider raising fees on both. Mainstream use of self-driving cars will be a game changer for the airport industry. Congressional reversal on new fees or "head taxes" would seem essential to maintain profitability at many airports.
Web based car rental platforms similar to Uber (i.e. TURO) may threaten traditional, airport car rental business, a major revenue source for GNV.	Operate in a fiscally responsible way. Keep airline and tenant costs low by preserving growth in parking and rental car revenues.	Successfully Lobbied legislature in conjunction with FAC to protect airport's ability to regulate and charge for all rental car access. Monitor execution of new law. Be vigilant for use of web based car rentals and be sure to develop effective operating rules and contracts for fee collection.