



# Overview - Regional Airport Strategy for the Boston Region and New England

*Presented by:*



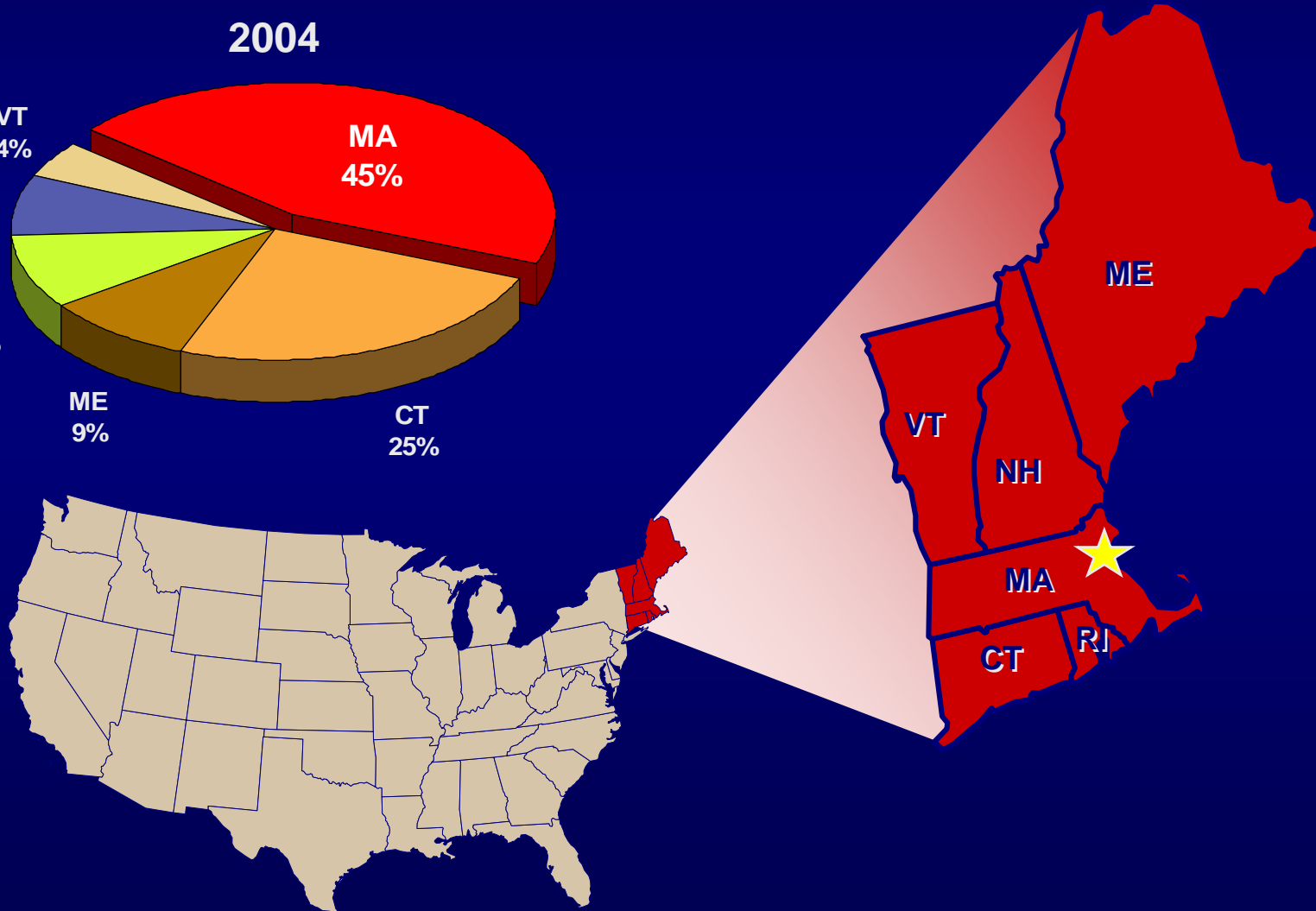
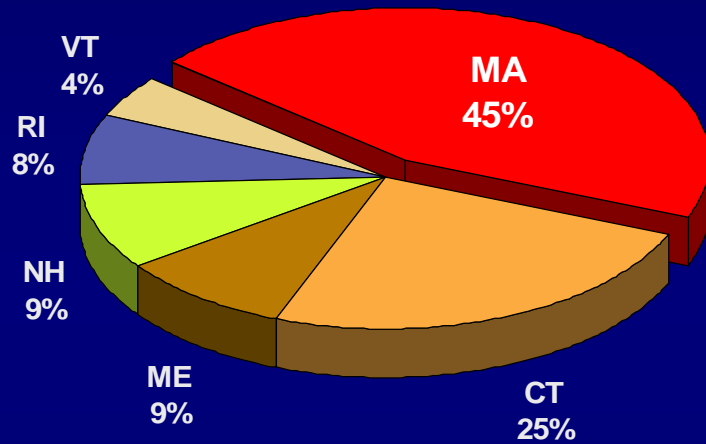
Flavio Leo  
Manager of Aviation Planning

**33<sup>rd</sup> Annual FAA Aviation Forecast Conference**  
March 10-11, 2008

# The New England Region is Home to Over 14M People

## New England Population by State

2004



# New England is Served by a Network of Regional Airports

## Passenger Activity at New England Airports

Airport	State	Passengers	% Share
Boston Logan	MA	27.10	56%
Hartford Bradley	CT	7.38	15%
Providence	RI	5.73	12%
Manchester	NH	4.33	9%
Portland	ME	1.45	3%
Burlington	VT	1.37	3%
Bangor	ME	0.50	1%
New Haven	CT	0.13	0%
Hanscom Field	MA	0.02	0%
Portsmouth Pease	NH	0.01	0%
Worcester	MA	-	0%
<b>Total</b>		<b>48.02</b>	<b>100%</b>

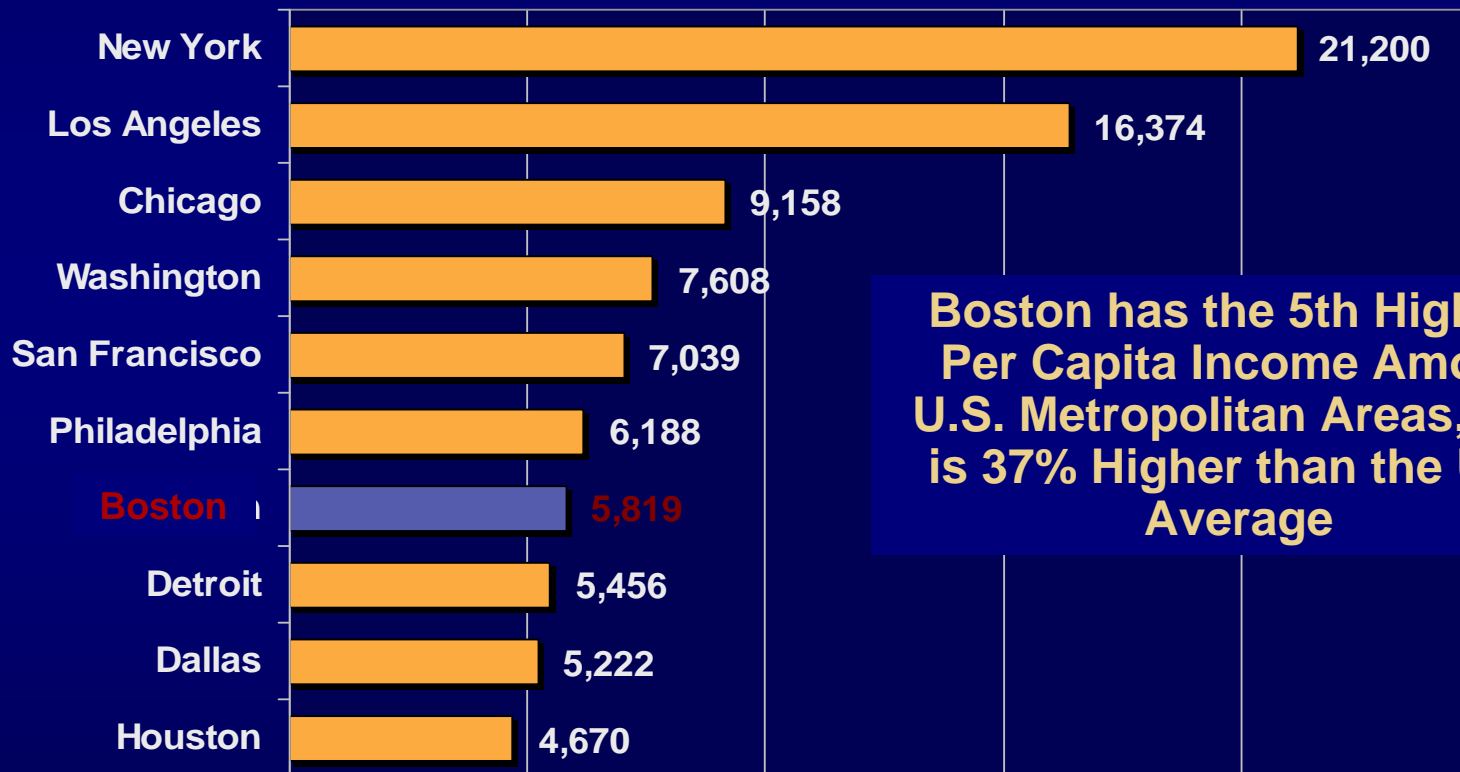
Source: Individual Airports



# Boston is the Largest Metropolitan Area in New England and the 7<sup>th</sup> Largest in the U.S.

## Top 10 U.S. Metro Areas

Population (in thousands)



**Boston has the 5th Highest Per Capita Income Among U.S. Metropolitan Areas, and is 37% Higher than the U.S. Average**

# Boston Logan is New England's Largest Airport and International Gateway

- ✦ About 90% Local Passengers
- ✦ 28.1M Passengers
- ✦ 400,000 Flights
- ✦ Served by Over 50
  - ✦ Including 16 Foreign Flag Carriers
  - ✦ No airline has over 25% market share
- ✦ \$8 billion/year in Economic Impact Supporting about 80,000 Jobs
  - ✦ Over 10,000 jobs directly on airport



# Logan Has Been One of the Most Delayed Airports in the U.S.

## DOT Delayed Arrival Rankings

*Air Travel  
Consumer Report*

<b>1991</b>	<b>3rd</b>
<b>1992</b>	<b>3rd</b>
<b>1993</b>	<b>2nd</b>
<b>1994</b>	<b>2nd</b>
<b>1995</b>	<b>4th</b>
<b>1996</b>	<b>6th</b>
<b>1997</b>	<b>5th</b>
<b>1998</b>	<b>2nd</b>
<b>1999</b>	<b>4th</b>
<b>2000</b>	<b>4th</b>
<b>2001</b>	<b>6th</b>
<b>2006</b>	<b>7th</b>

# Numerous Studies Have Been Conducted to Address Logan's Delay Problem

- ✦ Program for Airfield Capacity Efficiency (PACE), Massport (1988)
- ✦ Second Major Airport Site Selection Study, MAC (1991)
- ✦ Boston Logan International Airport, Airport Capacity Enhancement Plan, FAA (1992)
- ✦ Strategic Assessment Report, MAC (1993)
- ✦ New England Regional Airports, Air Passenger Service Study, Phase 1, NEC/FAA (1994)
- ✦ Logan Airside Improvements Feasibility Study, Massport (1995)
- ✦ New England Regional Airports, Air Passenger Service Study, Phase 2 NEC/FAA (1997)
- ✦ Logan Airside Improvements Planning Project EIS/EIR, FAA/Massport (1996-2002)
- ✦ New England Regional Airport System Plan – Phase 1 & 2, FAA/MAC/Massport (2002-ongoing)

## **Massport (Working with the FAA) Developed a Comprehensive Program to Reduce Delays at Boston Logan**

**Physical Expansion (New Runway)**



**Demand Management**



**Increase Use of Regional Airports**

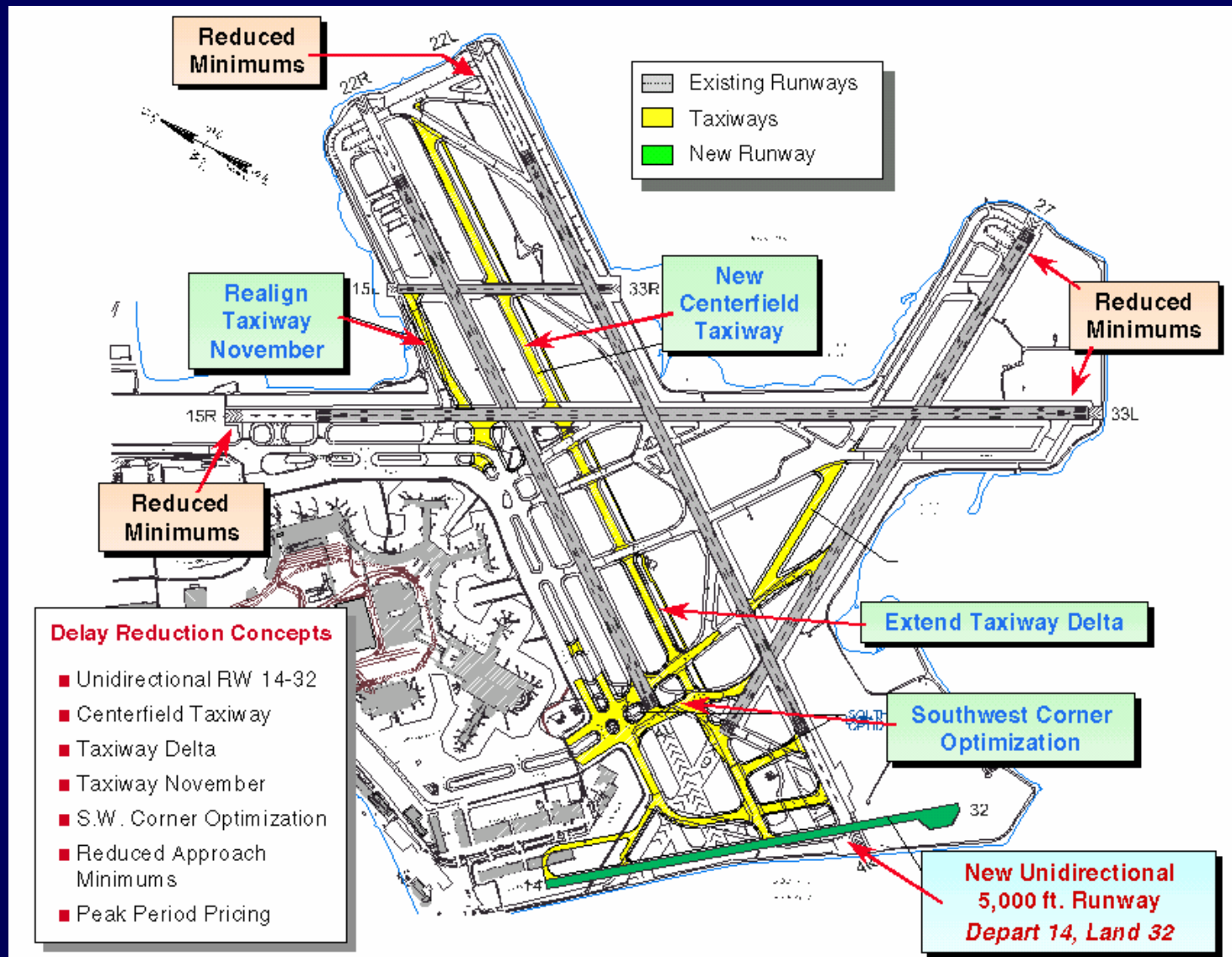


**High Speed Rail to Top O&D Markets  
(NYC and WAS)**

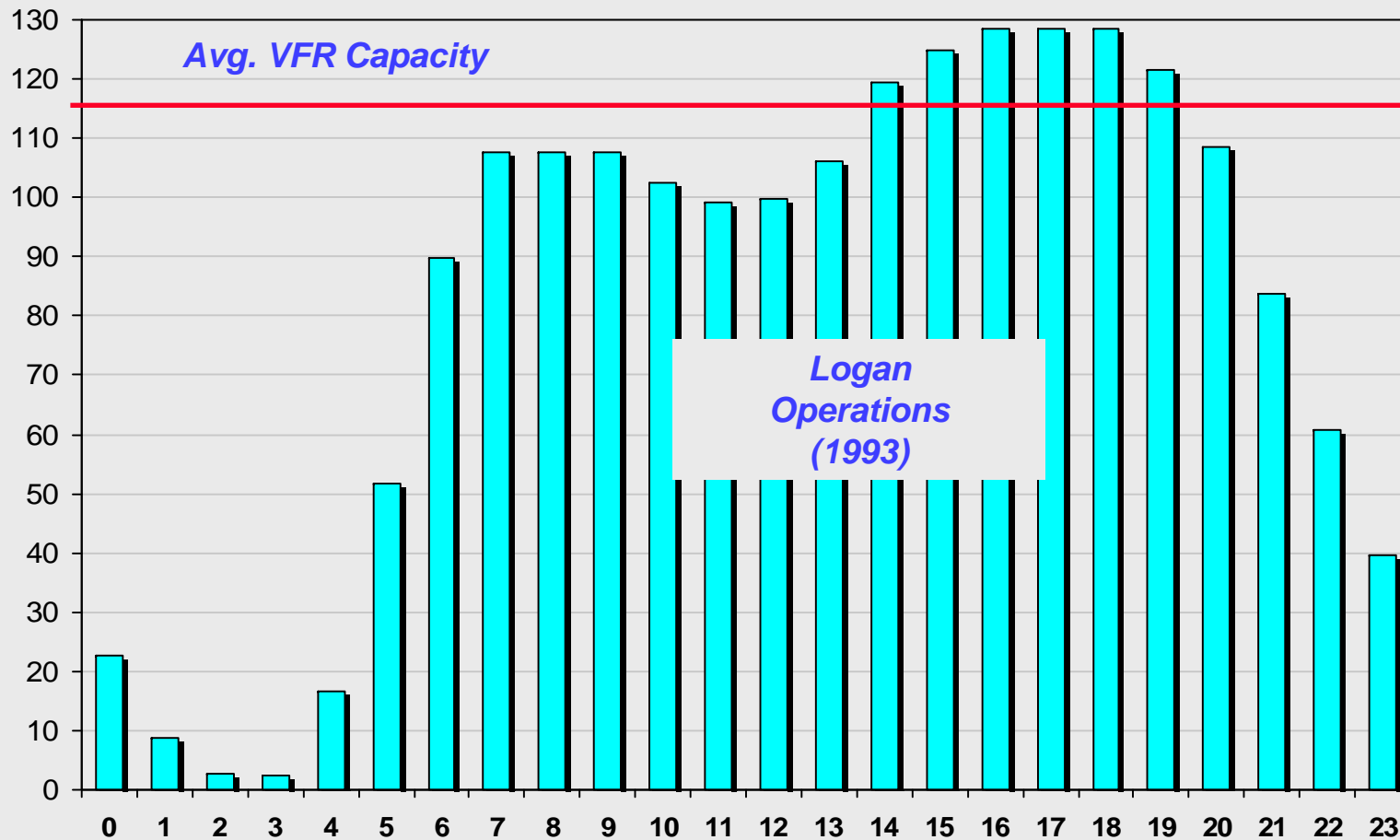




# Physical and Technology Improvements at Boston Logan



# Peak Period Pricing Program Designed to Reduce Delays from Overscheduling (During Good Weather)



Note: Schedule is 3-Hour Average August Weekday

# Expand the Use of New England Regional Airports to Reduce Regional Dependence on Logan



## Core Service Area Population

Logan	3.1M
T.F. Green	1.4M
Manchester	1.1M
Worcester	1.0M



## Key Regional Planning Studies...

- ✦ Boston Regional Airport System Study (1989)
- ✦ Second Major Airport (SMA) Study (1990)
- ✦ Strategic Assessment Report (SAR) (1993)
- ✦ Phase I: New England Regional Air Service Study (1995)
- ✦ Phase II: NEARASP (ongoing)



## Extensive Infrastructure Investments at Boston, Manchester and Providence since the mid-1990s

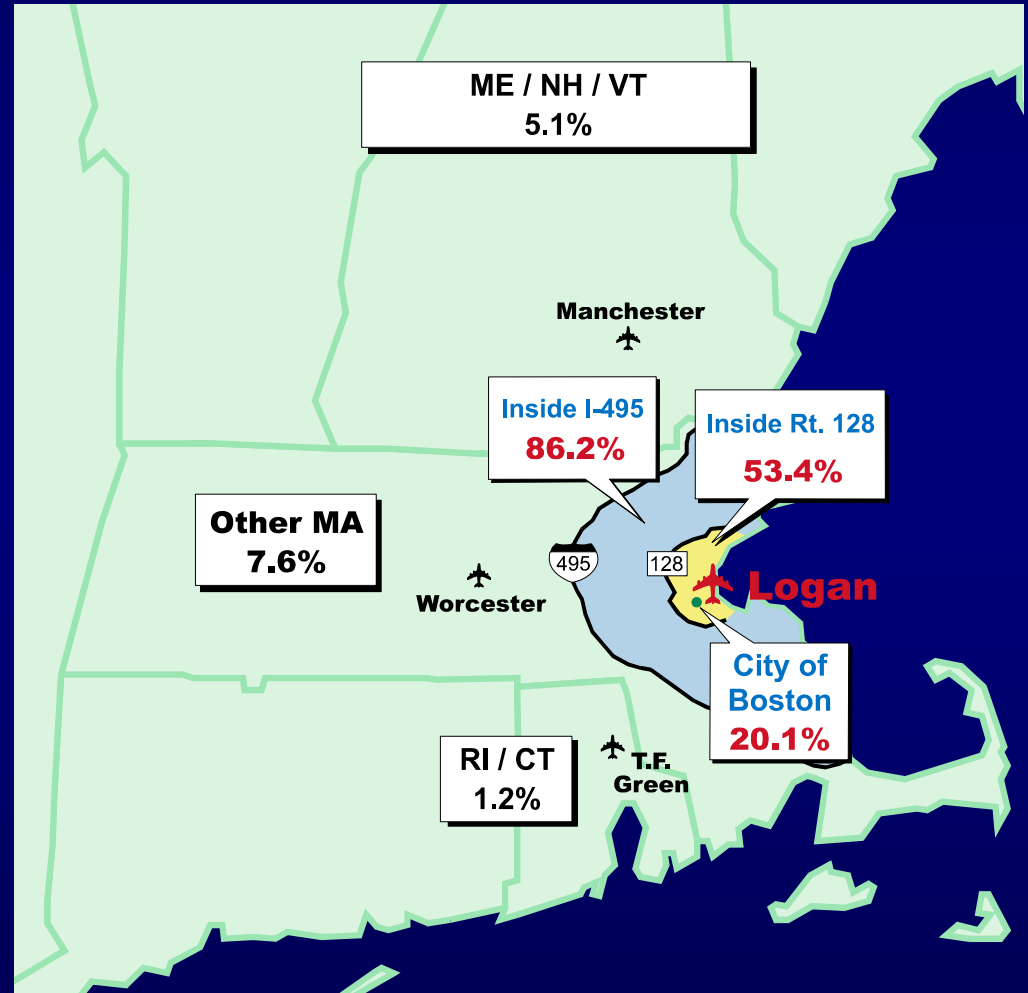
- ✦ Boston Logan – Airside and Landside Improvements
- ✦ Manchester – New Terminal, new 4,800 space garage, \$180 million runway reconstruction and lengthening, improved road access.
- ✦ Providence – new \$200M terminal, new 3,000 space parking garage, airfield improvements and seeking to lengthen runway
- ✦ Massport Focus on Hanscom AFB as Corporate Reliever and Operating Responsibility of Worcester Regional Airport

## Enhanced Multi-Modal Connections to Support Regionalization

- ✱ Acela Rail Service from Boston to New York
- ✱ Increased Commuter Rail Service from Boston to Providence/T.F. Green Airport
- ✱ Expanded Commuter Rail Service from Boston to NH and ME
- ✱ Route 3 Widening Improved Access to Manchester

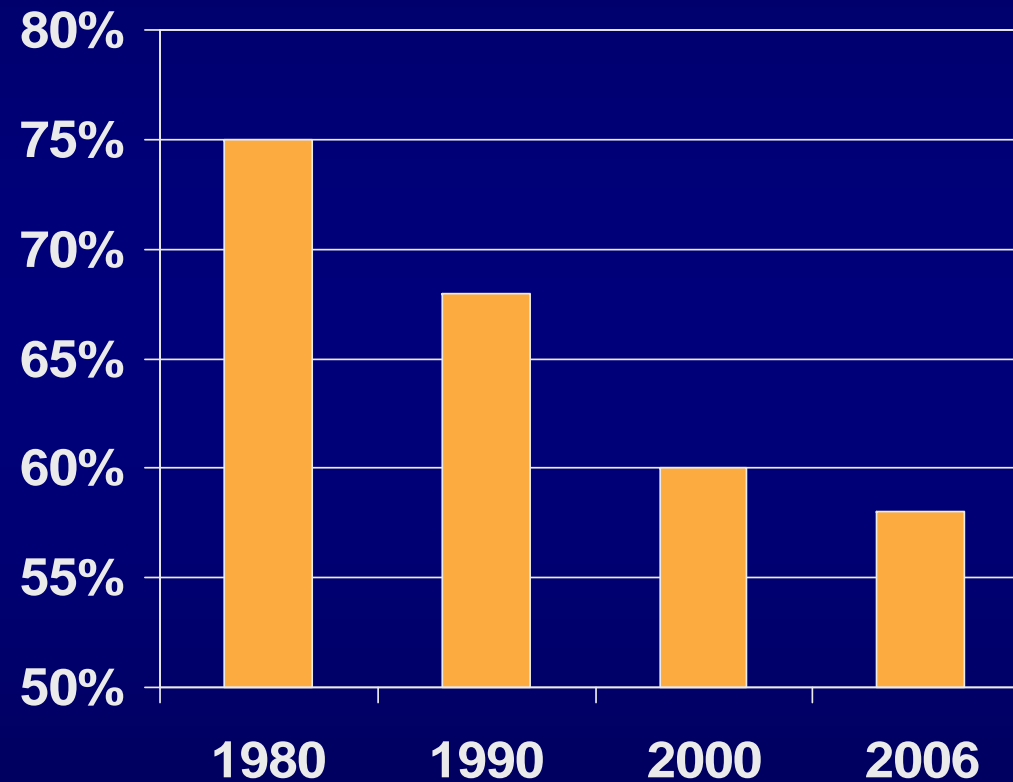
**In 1999, 86% of Logan's O&D Passenger Demand was Generated by the Region Within the I-495 Beltway, Compared to 78% in 1996...**

**With Service Expansion at T.F. Green and Manchester, Fewer Logan Users Come from Outside I-495**



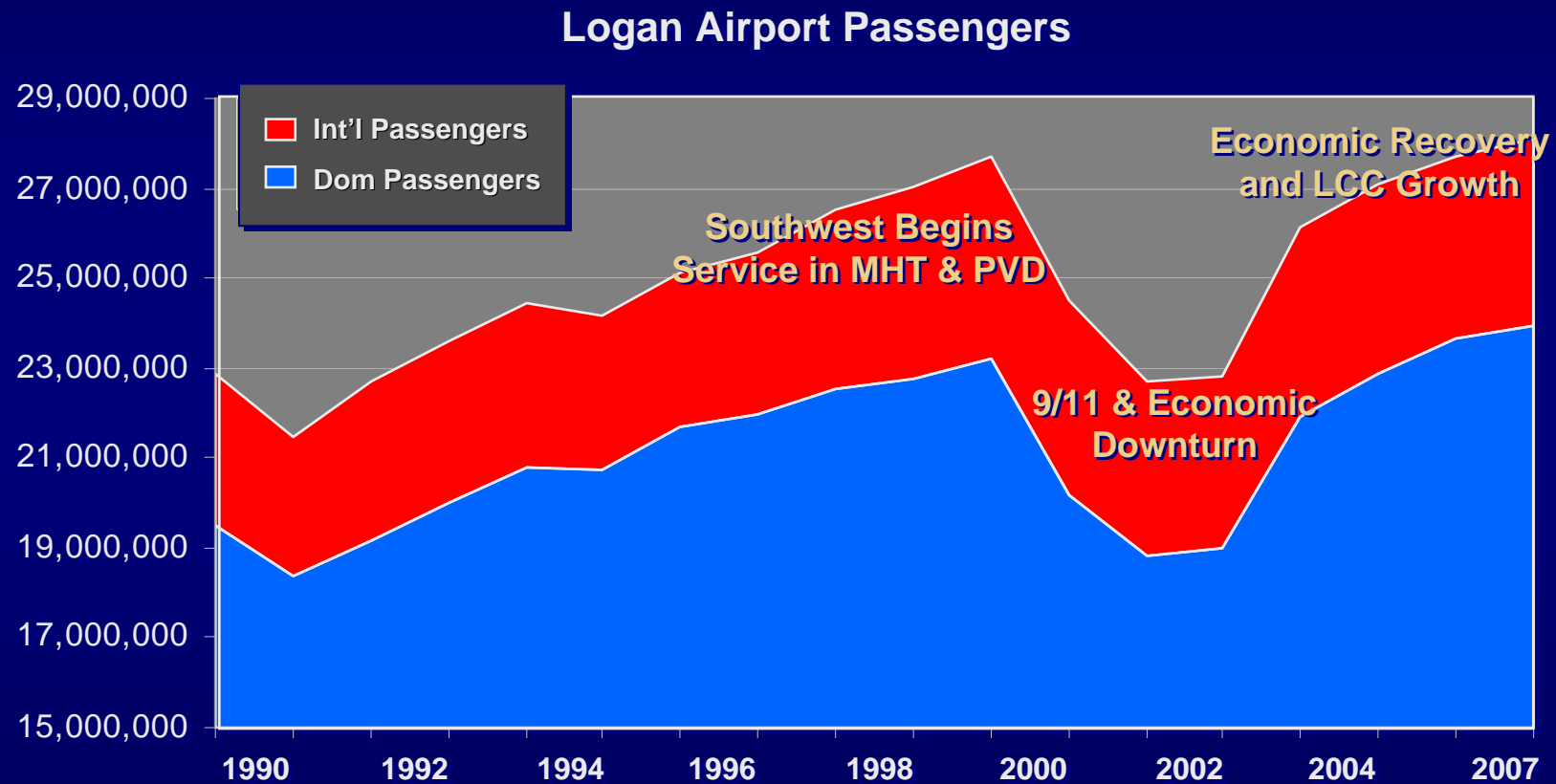
## And Boston Logan's Overall Share of New England Passengers Dropped...

Boston Logan Share of New England Airport Passengers





# During the same period, Boston Logan Continued to Grow. In 2007 the Airport Accommodated a Record 28.1M Pax



Source: Massport

## **The Regionalization Effort Continues. The New England Regional Airport System Plan Phase II Sponsored by the New England Airport Coalition**

- ✦ FAA Airports Division
- ✦ Major Airports
- ✦ State Departments of Transportation
- ✦ State Authorities/Agencies
- ✦ The New England Council

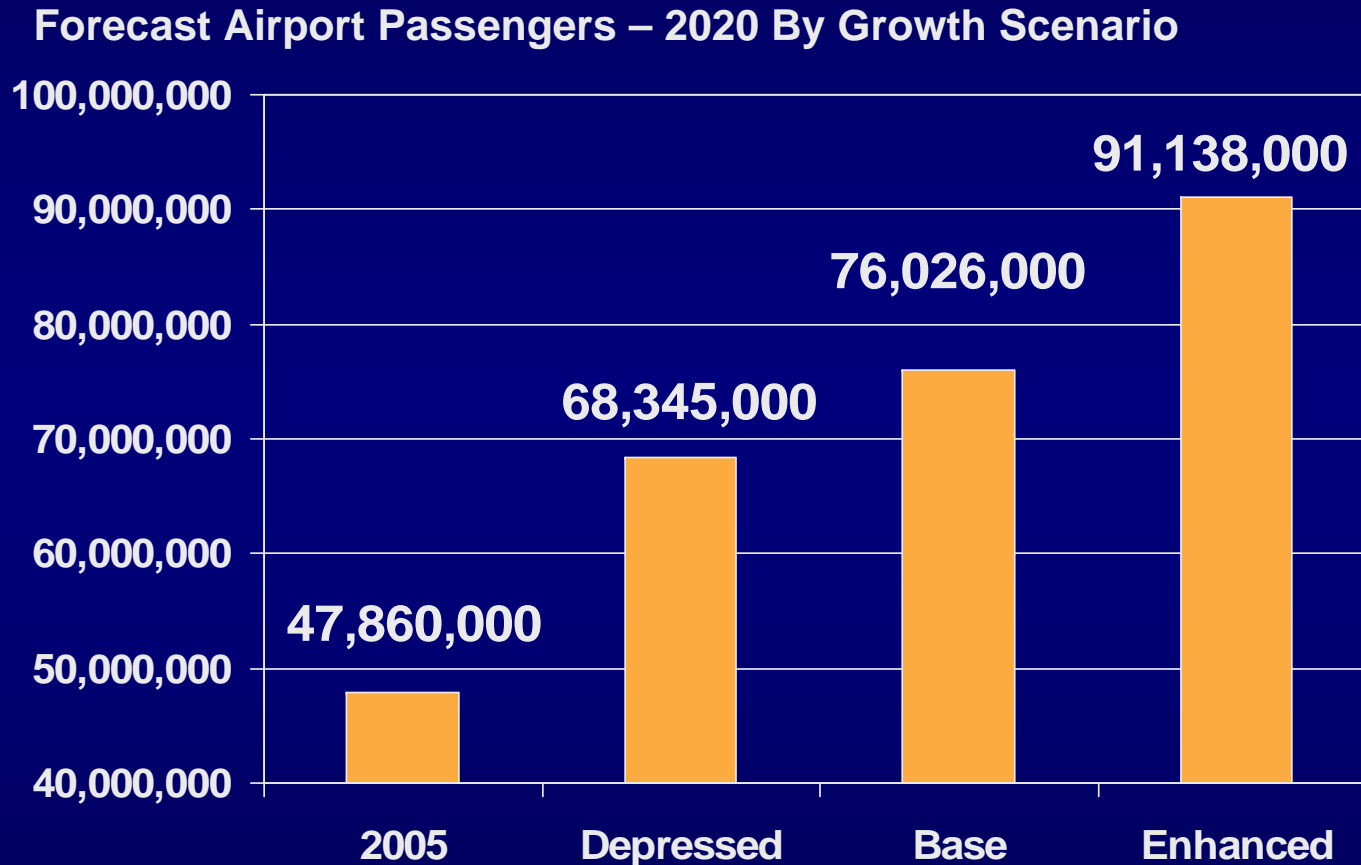
## Aviation System Plan Phase II (Overview)

- ✦ Goal: Understand Market Dynamics and Plan for Facility Requirements
- ✦ Determine Capacity of Airport Elements
- ✦ Viability of New or Optimized Service
- ✦ Ground Access Initiatives
- ✦ Demand on NAS and Major Hubs
- ✦ Develop Action Plans to Aid in Decision Making Process

## Identified the Long Term Aviation Planning Issues for the New England Region

- ✦ Population Growth is Expected to be Flat
- ✦ Demand for Travel is Expected to Increase
  - ✦ From 48M Pax to 70M Pax by 2020
- ✦ High Propensity to Travel
  - ✦ 2.5 pax trips/capita versus 1.4 for the nation
- ✦ Diverse Economy Higher Rates of Travel
  - ✦ Tourism, Higher Education, Technology, Finance, Medical, Biotechnology
- ✦ Geographically Isolated – O&D Travel
- ✦ Very Difficult to Build New Facilities or Expand Existing

# Forecasted Passenger Demand for the System. Projected Growth of 20M to Over 40 million Pax by 2020



## Based on the Forecasts, Action Plans Were Developed for Each Airport

- ✦ Enhance Technology to Increase Dependability During Bad Weather
- ✦ Support Application of Peak Period Pricing Programs – VFR Capacity
- ✦ Support Continued Growth at Underutilized Airports
  - ✦ Bangor, Burlington, Portland
- ✦ Develop “Targeted” Markets for Certain Airports
  - ✦ Portsmouth, Worcester, Hanscom
- ✦ Improve Ground Access to New England Airports
- ✦ Work to Improve Environmental Review Process to Facilitate Investments at Airports

## Despite Different State Jurisdictions, Various Ownership Models, Varied Interests Regionalization has Succeeded in New England

- ✦ Collaborative Effort
- ✦ Focus On Synergies/Common Concerns
- ✦ Lots of Opportunity for “Win-Win” Strategies
- ✦ Continue to Market Airports to Provide Best Service (fares, frequency, markets) to Passengers
- ✦ In the long run, everyone benefits from a growing regional airport system

**END**