

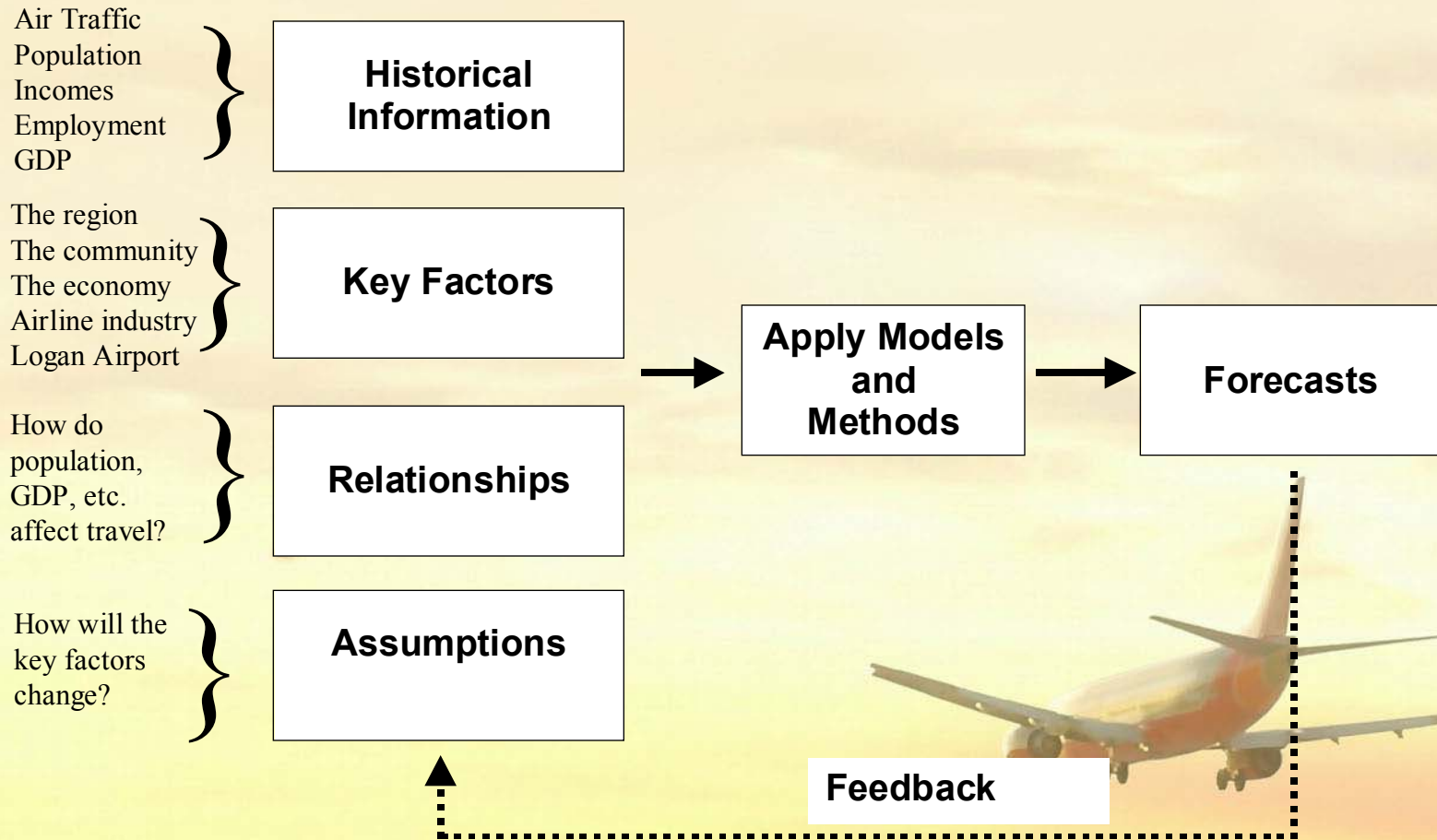
Study Resource Committee (SRC) Meeting

T. F. Green Airport Master Plan Update Unconstrained Demand Forecasts

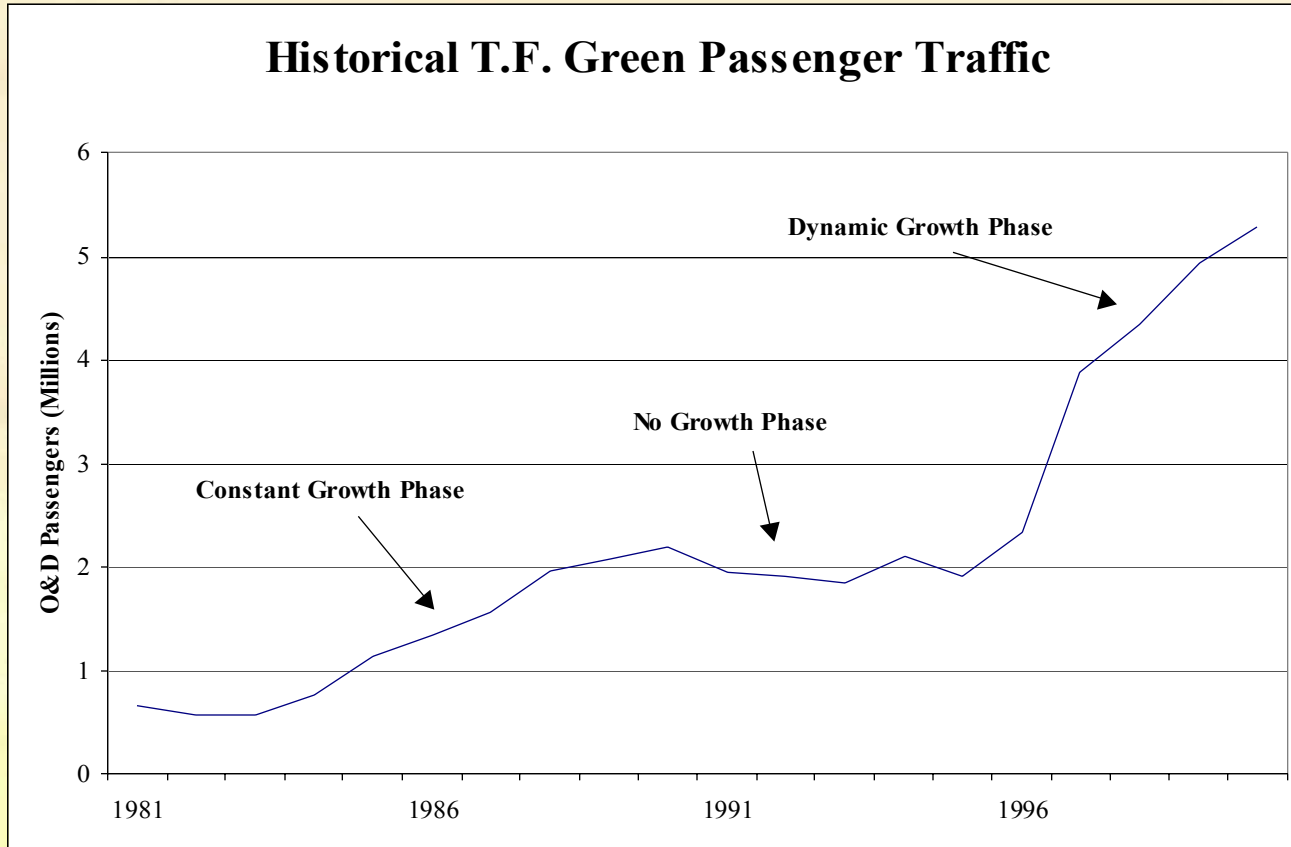
**January 24, 2002
5:30 p.m.**



THE FORECASTING PROCESS



TRAFFIC AT T.F. GREEN HAS SHOWN THREE STAGES

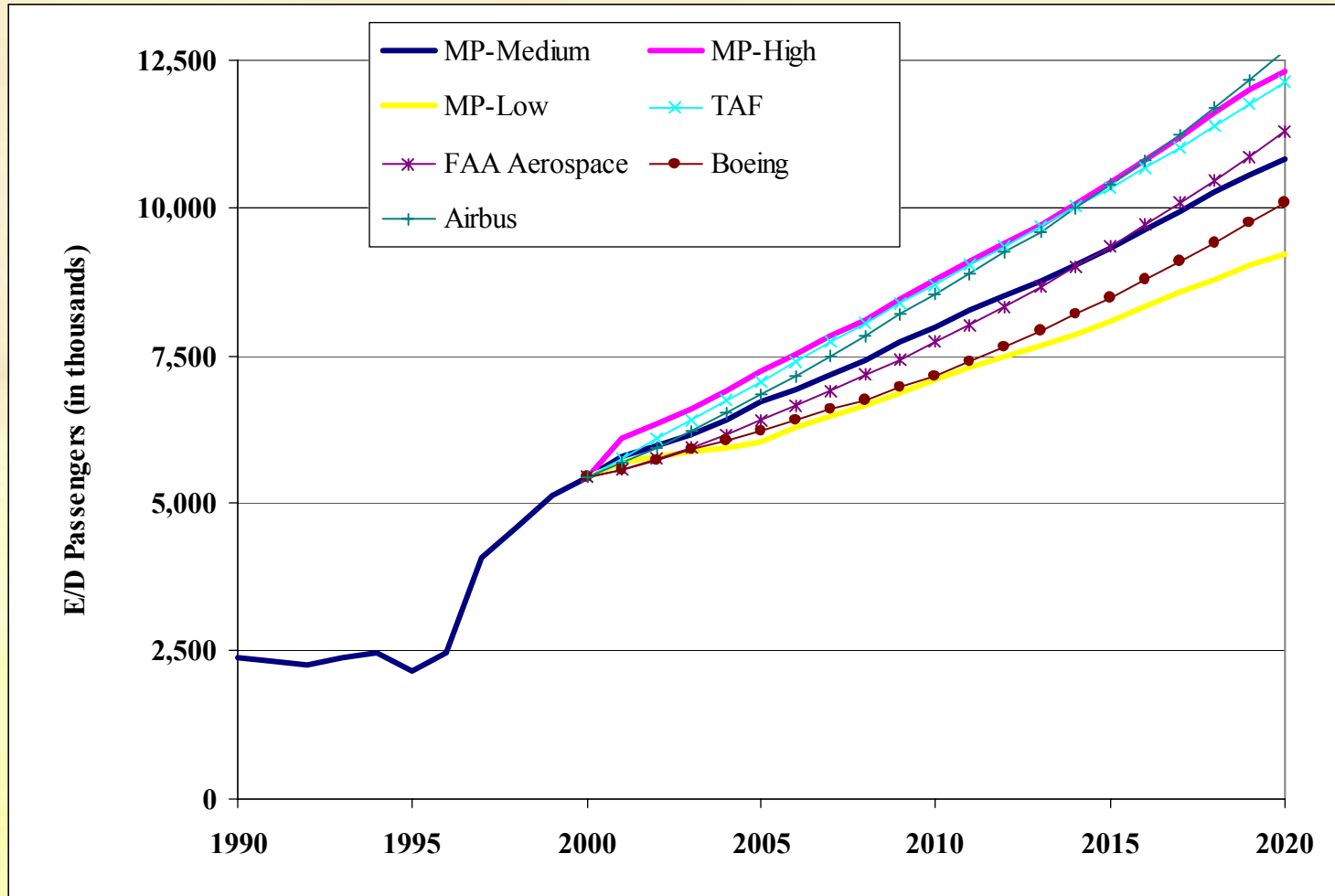


THE FORECASTS ARE BASED PARTLY ON FEEDBACK FROM THE JULY 25 SRC MEETING

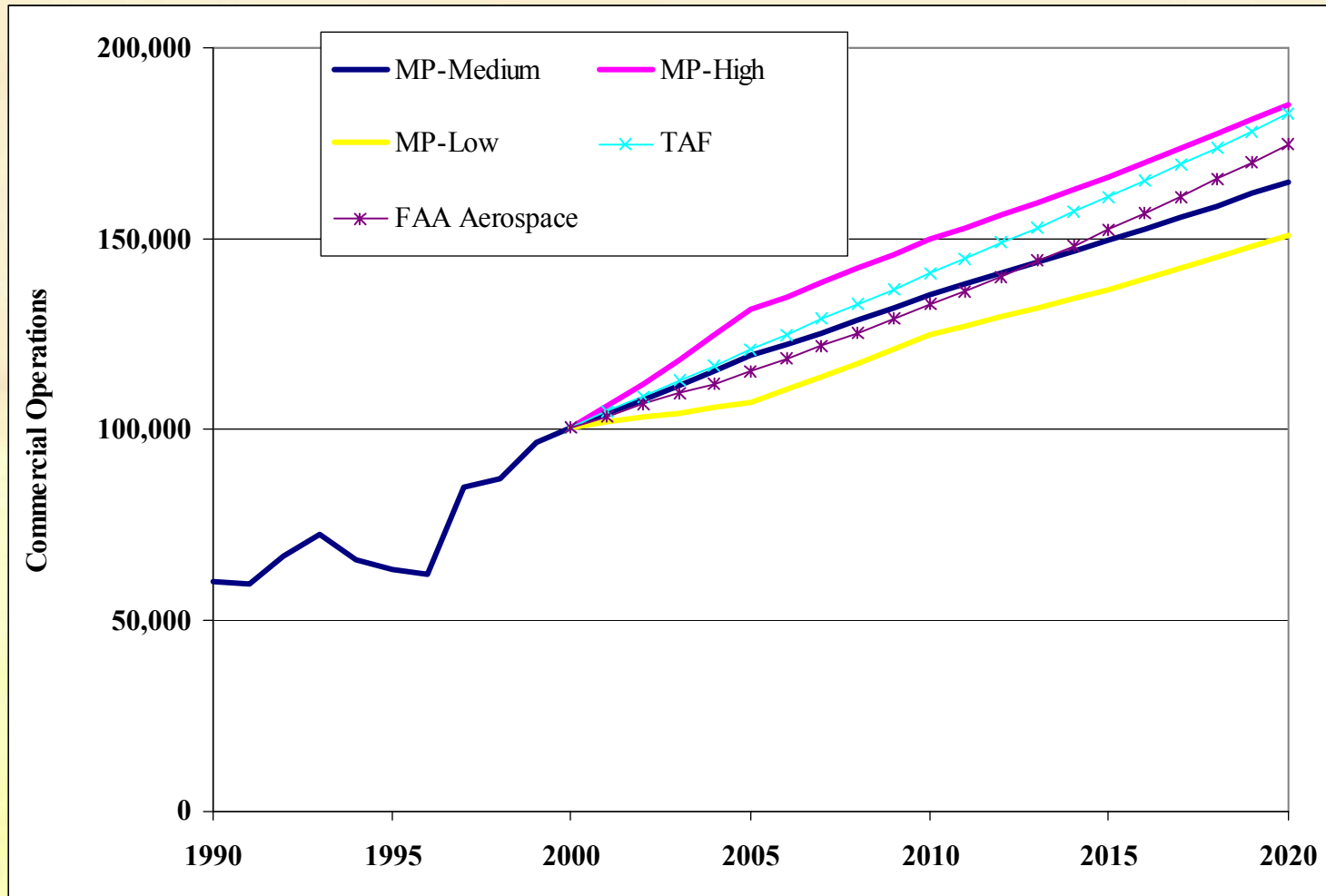
- **Intermodality/rail**
- **Competition from other NE airports**
 - **Developed “Enhanced Share” scenario**
 - **Logan, Manchester, Worcester, Hanscom, New Bedford**
- **Attractiveness of destination**
- **International vs. domestic travel**



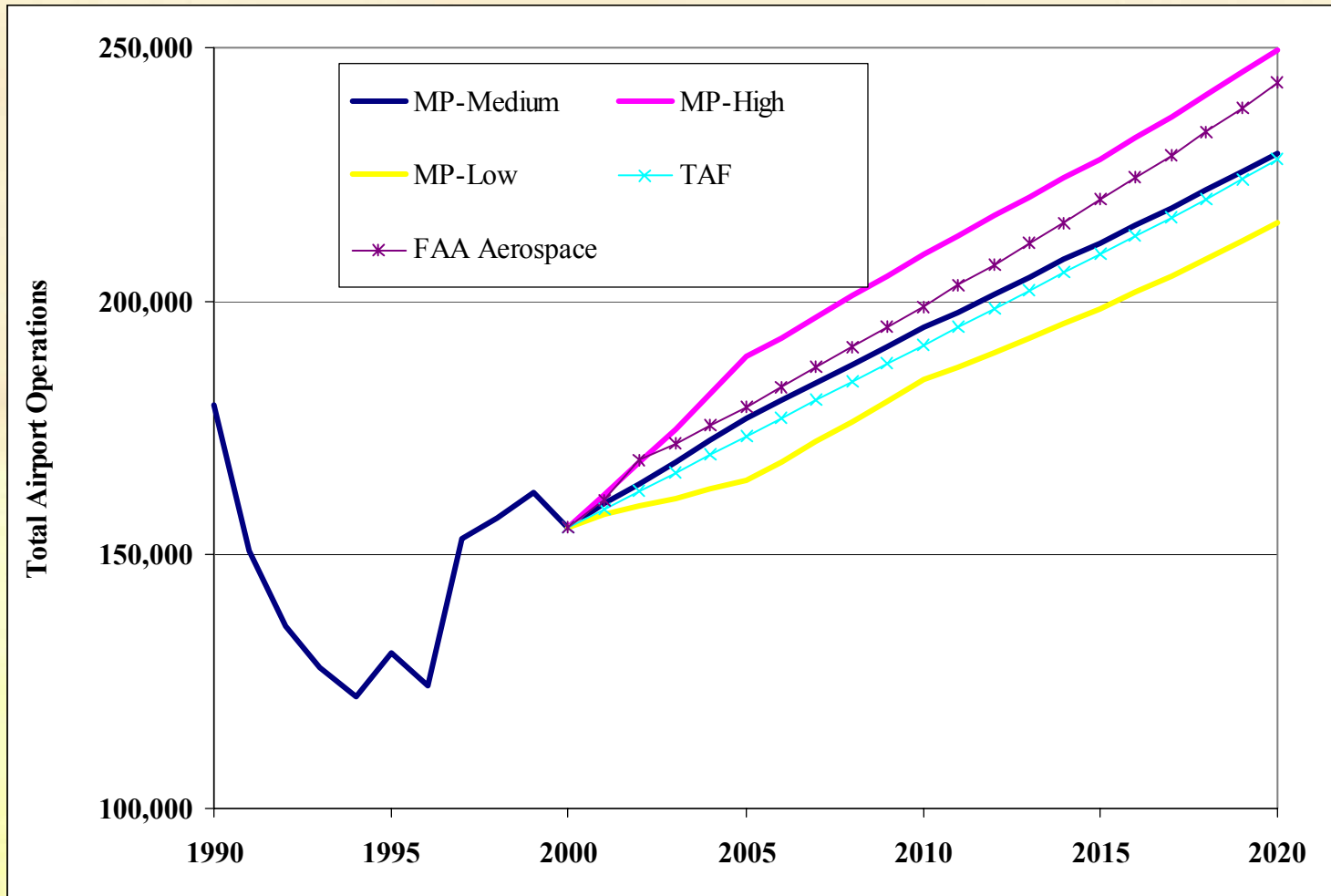
LOW, MEDIUM AND HIGH ANNUAL PASSENGER FORECASTS IN COMPARISON WITH PUBLISHED U.S. DOMESTIC FORECASTS



LOW, MEDIUM AND HIGH ANNUAL COMMERCIAL OPERATIONS FORECASTS



LOW, MEDIUM AND HIGH TOTAL ANNUAL OPERATIONS FORECASTS



THE TEAM'S ANNUAL PASSENGER FORECASTS ARE SIMILAR TO THOSE OF OTHER SOURCES

Projected Average Annual Growth Rates

Forecast	2000 to 2005	2005 to 2010	2010 to 2015	2015 to 2020
MP-Medium	4.3%	3.6%	3.1%	3.1%
MP-High	5.9%	4.0%	3.4%	3.4%
MP-Low	2.1%	3.3%	2.6%	2.7%
TAF	5.4%	4.3%	3.5%	3.3%
FAA Aerospace	3.3%	3.8%	3.9%	3.9%
Boeing	2.8%	2.8%	3.5%	3.5%
Airbus	4.7%	4.6%	4.0%	4.0%



COMMERCIAL OPERATIONS FORECASTS ARE SIMILAR

Projected Average Annual Growth Rates

Forecast	2000 to 2005	2005 to 2010	2010 to 2015	2015 to 2020
MP-Medium	3.5%	2.5%	2.1%	2.0%
MP-High	5.5%	2.6%	2.1%	2.2%
MP-Low	1.3%	3.1%	1.8%	2.0%
TAF	3.7%	3.1%	2.7%	2.6%
FAA Aerospace	2.8%	2.8%	2.8%	2.8%



ANNUAL TOTAL OPERATIONS FORECASTS ARE SIMILAR

Projected Average Annual Growth Rates

Forecast	2000 to 2005	2005 to 2010	2010 to 2015	2015 to 2020
MP-Medium	2.6%	1.9%	1.7%	1.6%
MP-High	4.0%	2.1%	1.7%	1.8%
MP-Low	1.2%	2.3%	1.5%	1.6%
TAF	2.2%	2.0%	1.8%	1.7%
FAA Aerospace	2.9%	2.1%	2.0%	2.0%



THE MIX OF AIRCRAFT AT T.F. GREEN WILL SEE A STEADY EVOLUTION

Aircraft Type	2000	2005	2010	2015	2020
General Aviation - Jet Aircraft	19%	17%	16%	16%	15%
General Aviation - Piston Engine	17%	15%	14%	13%	13%
Turboprop Aircraft	30%	21%	19%	18%	16%
Regional Jets	1%	9%	10%	10%	12%
Narrow Body Jets	33%	38%	40%	42%	43%
Wide Body Jets	0%	0%	0%	1%	1%



PLANNING REQUIREMENTS WILL INCREASE IN THE FUTURE

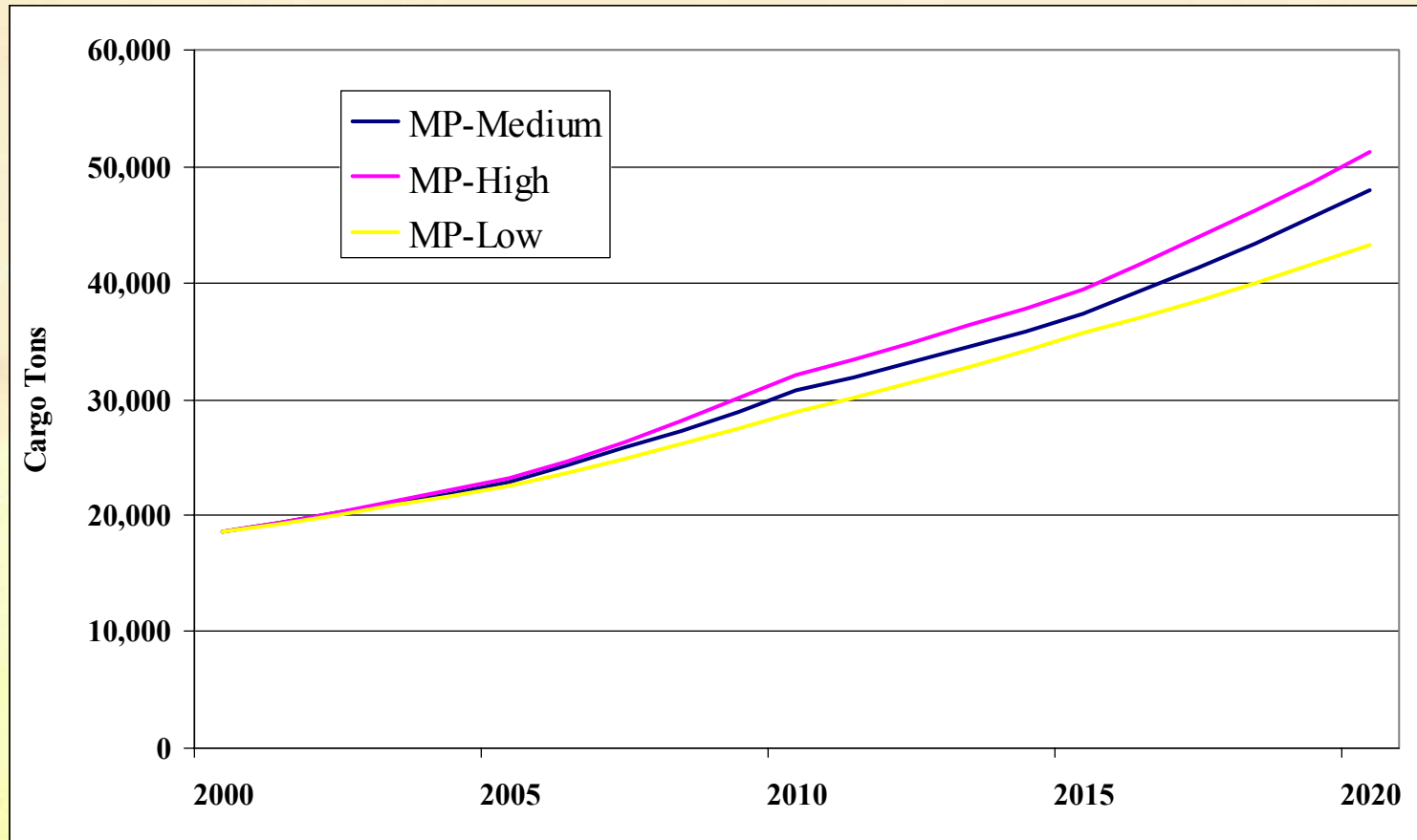
Medium Case Peak Hour Forecasts

Passengers	2000	2005	2010	2015	2020
Air Carriers	1,535	1,893	2,272	2,669	3,127
Commuter Carriers	214	266	301	322	346
Total	1,701	2,086	2,489	2,897	3,369

Aircraft Operations	2000	2005	2010	2015	2020
Air Carriers	17	20	24	28	31
Commuter Carriers	16	18	19	20	21
Non-Scheduled	20	21	22	23	24
Total	52	58	64	69	75



T.F. GREEN CARGO TRAFFIC WILL INCREASE SIGNIFICANTLY OVER THE PLANNING PERIOD

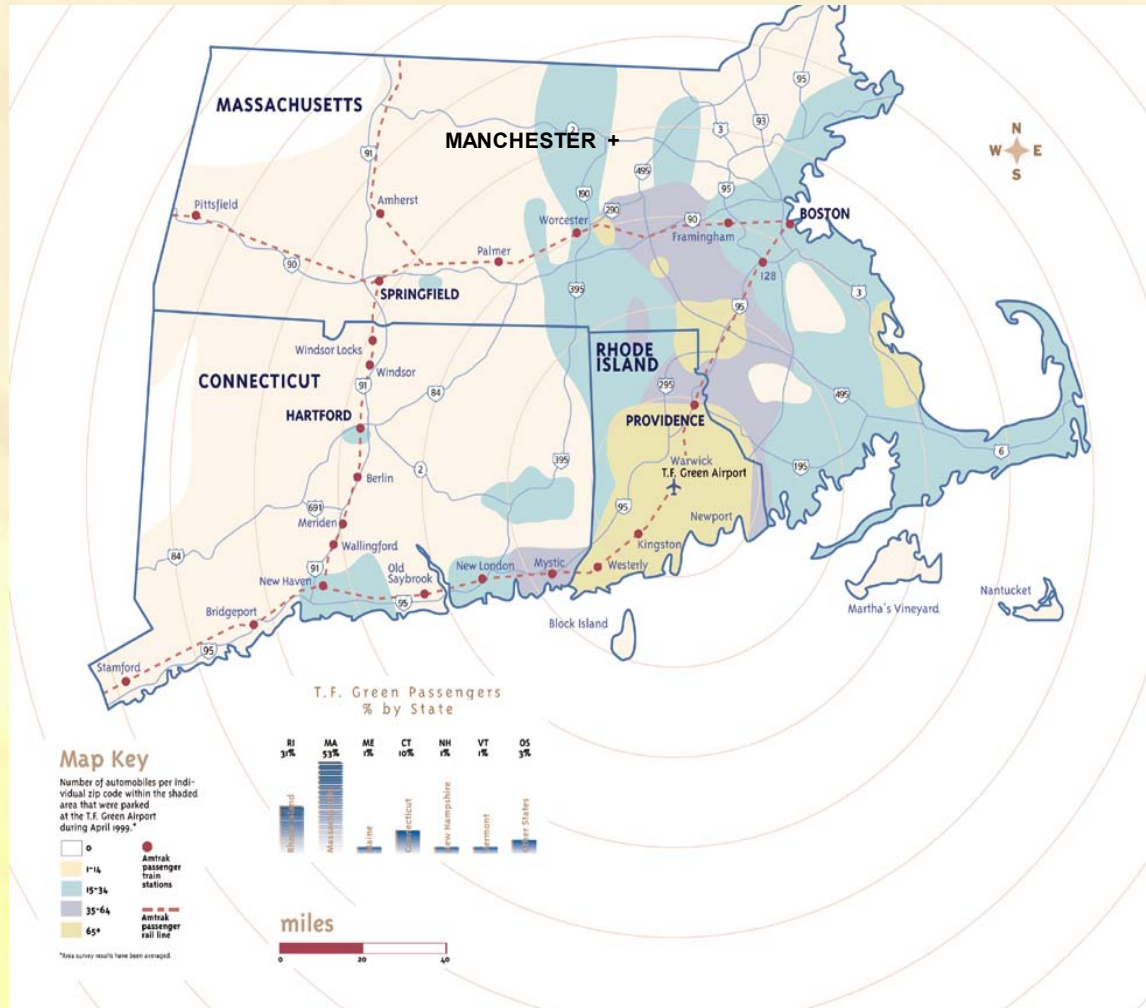


QUIETER AIRCRAFT WILL SEE INCREASING USE AT T.F. GREEN

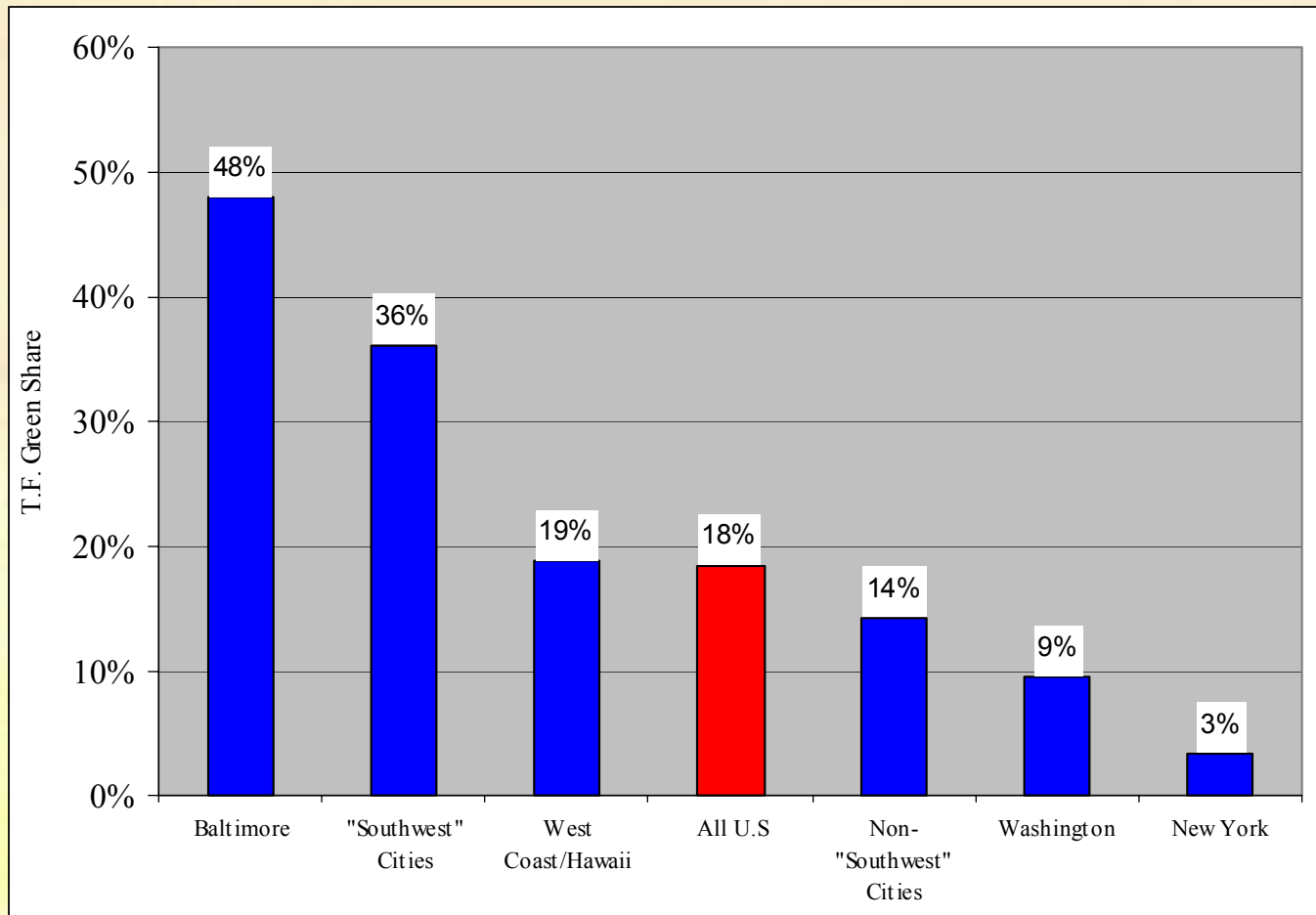
- **Retrofitted aircraft and loudest pure Stage III aircraft (MD80s) will be virtually eliminated by 2020**
- **Quieter aircraft such as the new generation B-737s, B-757, and A320 will see increased use over forecast period**



THE AUGMENTED SHARE CASE SEES T.F. GREEN SERVING AS A LARGER REGIONAL GATEWAY



T.F. GREEN'S SHARE OF SOUTHERN NEW ENGLAND TRAFFIC VARIES WIDELY BY DESTINATION



THE AUGMENTED SHARE CASE IS BASED ON KEY VARIABLES

- **RI, MA, CT, RI**
- **Population**
- **Income**
- **Non-farm private employment**
- **Retail sales**
- **Distance from T.F. Green**
- **Distance from competing airports**

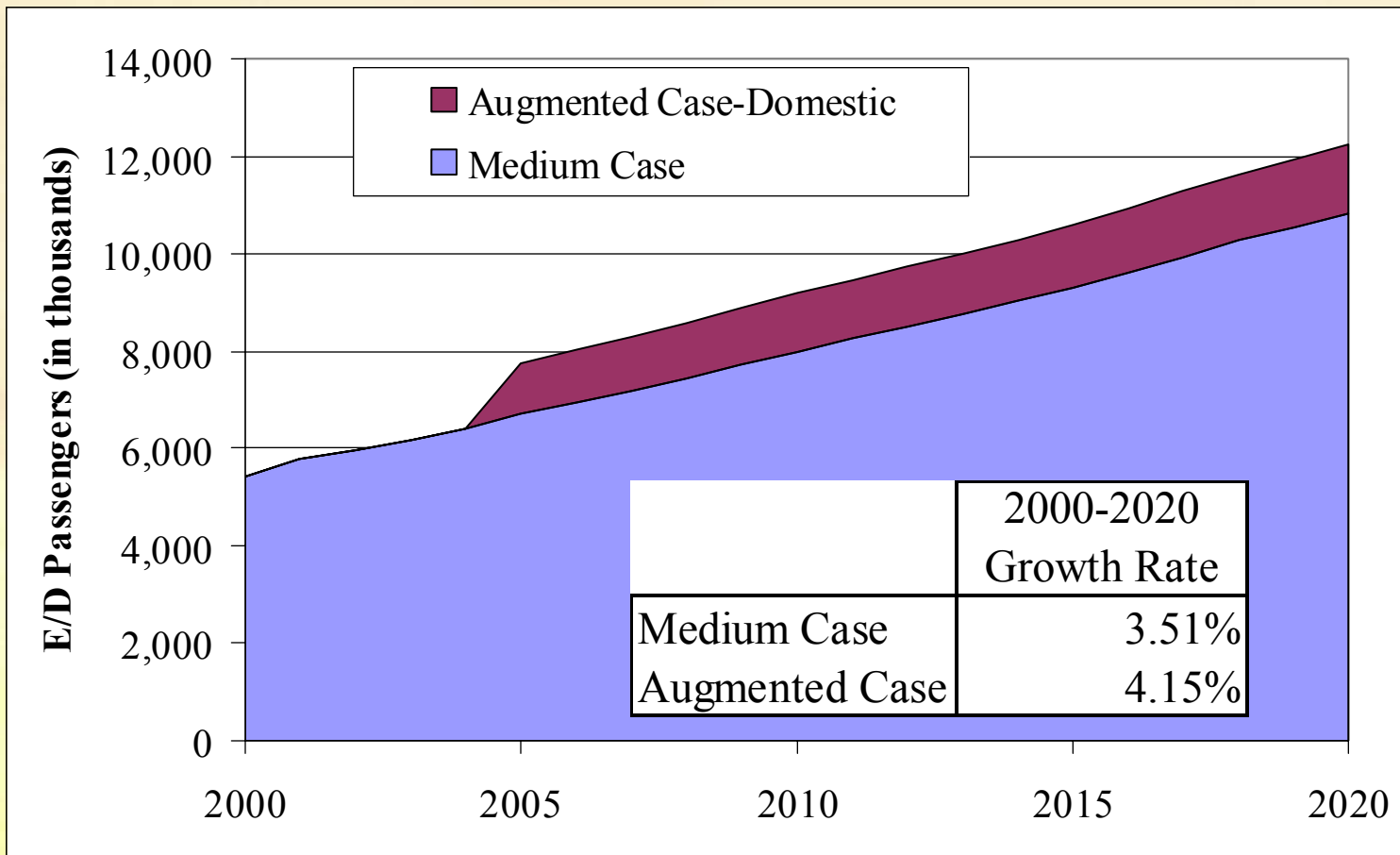


THE AUGMENTED SHARE CASE MAKES KEY ASSUMPTIONS AT T.F. GREEN

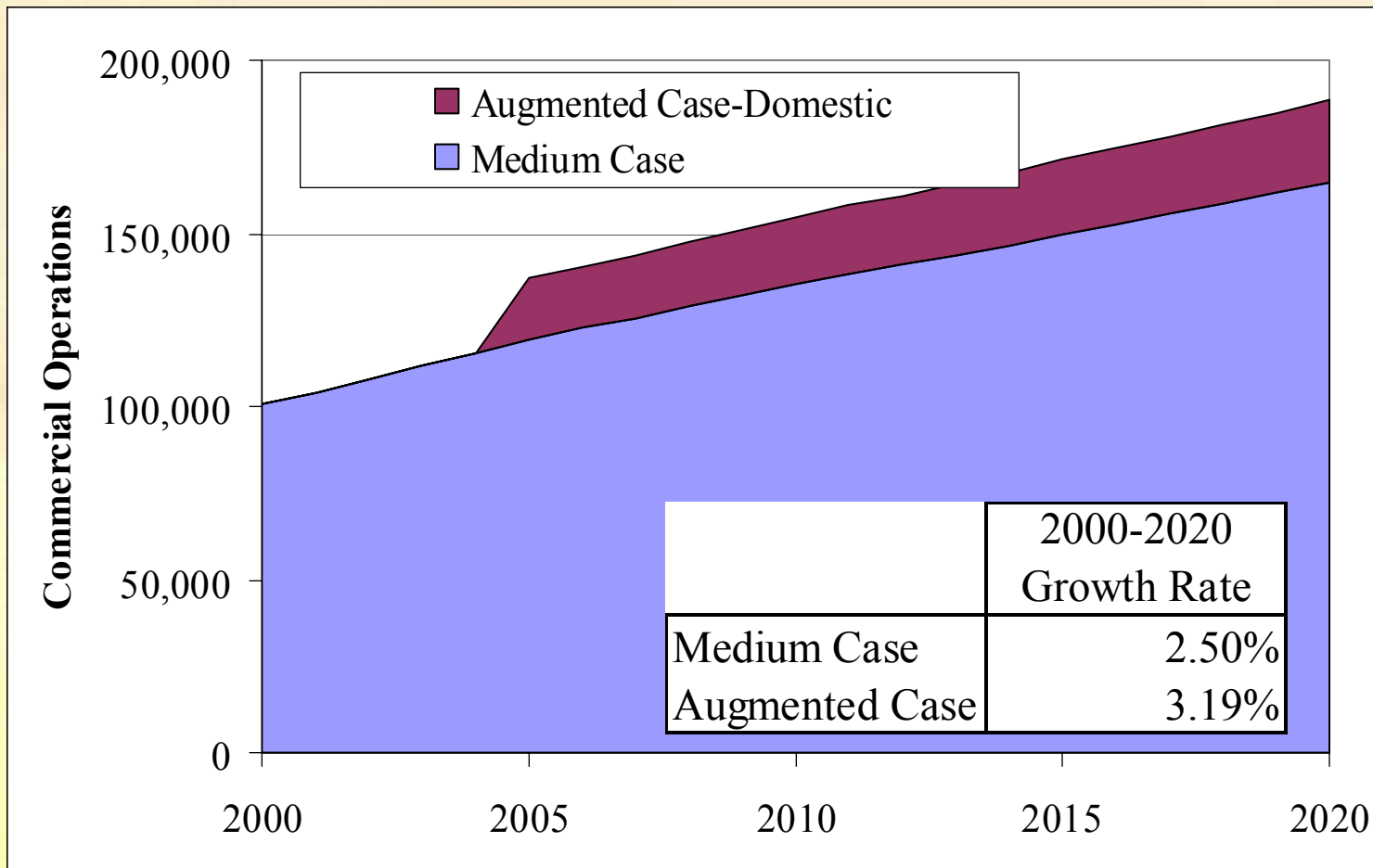
- **No long haul scheduled international services**
- **Transfer of southern charter services from Logan**
- **Maintain market share of Southwest cities**
- **Capture of “fair share” of region’s traffic**



THE AUGMENTED SHARE SCENARIO PREDICTS GREATER TRAFFIC TO T.F. GREEN...



... AND MORE OPERATIONS



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