

Fayetteville



FAYETTEVILLE REGIONAL AIRPORT - WASHINGTON D.C.  
AIR SERVICE OPPORTUNITIES

Output from Air Service Study Activities





## AIR SERVICE OPPORTUNITIES

### Air Service Study Background

- BRAC-RTF completed a "Growth Plan" that identified a military need for direct flights to the Washington, DC area
- As a result of this recommendation, City Council adopted "Direct Flight to DC" as an element of its Strategic Planning efforts
- The Airport was tasked with development and implementation of a plan for this goal
- An RFP process resulted in the selection of InterVISTAS Consulting, a Washington, DC-based aviation consulting firm, to conduct the study



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## AIR SERVICE OPPORTUNITIES

### Air Service Study Elements

- Study of the Fayetteville – Washington, DC market
- Airline meetings and presentations
- Feasibility study of alternative air services (contract charters, air taxis)
- Small Community Air Service Development grant application





## AIR SERVICE OPPORTUNITIES

# Market Study Overview

- Objectives
  - Understand the demand for local FAY-DC air service and possible connecting services
  - Forecast demand of current market and net additions from BRAC
  - Develop business case for airlines to initiate service
- Methodology and Activities to Date
  - Data gathering and analysis (*U.S. DOT airline data, Fort Bragg and Fort McPherson military travel data, economic/demographic data*)
  - Business and personal travel surveys
  - Community outreach
- Key Findings





## AIR SERVICE OPPORTUNITIES

# Analytical Results

- Regional Economics and Demographics
- Business Community
- Market Size and Dynamics
  - Current market trends and travel patterns
  - Leakage to alternate airports / modes
  - Impact of BRAC on regional demand profile



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## AIR SERVICE OPPORTUNITIES

### Executive Summary

- Fayetteville and the Fort Bragg Region are dynamic, thriving communities
- BRAC will add thousands of new residents and jobs to the Fort Bragg Region
- There is an acute need for improved air service at Fayetteville Regional Airport (FAY) – particularly to Washington, DC
- The U.S. Military and nearby communities support FAY's efforts to attract Washington, DC service
- A strong business case can be made for nonstop services between Fayetteville and Washington, DC





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## AIR SERVICE OPPORTUNITIES

# Background on Fayetteville and the Ft. Bragg Region



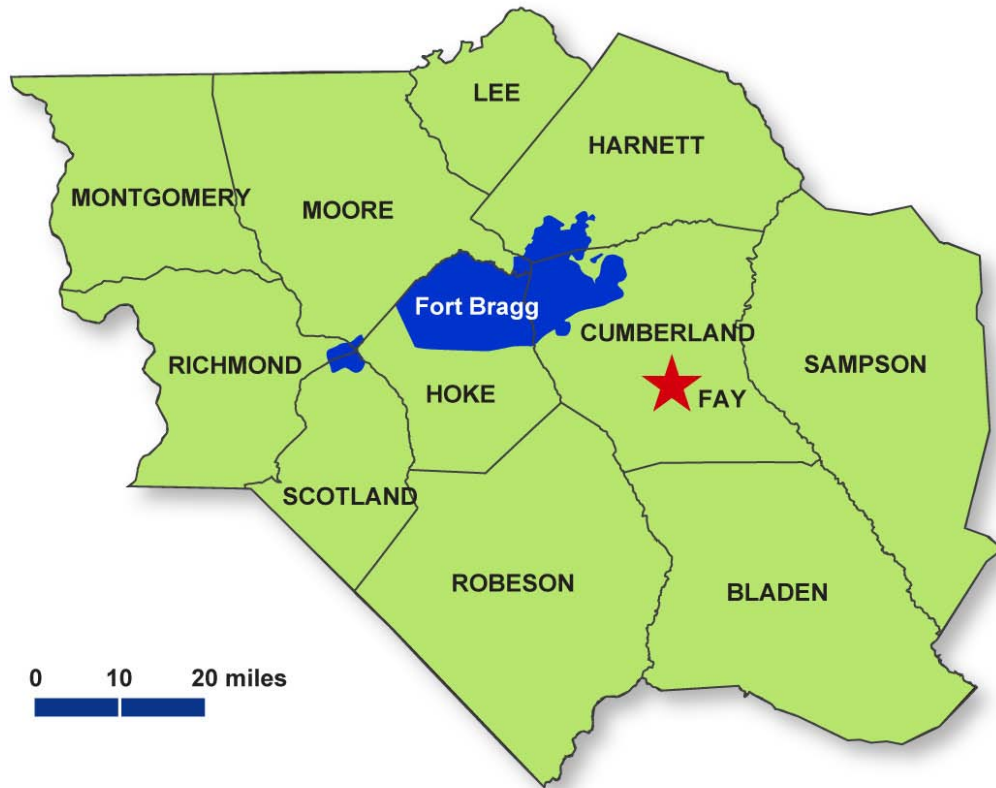


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## AIR SERVICE OPPORTUNITIES

# Fayetteville and the Fort Bragg Region





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## AIR SERVICE OPPORTUNITIES

### Regional Profile

- The Fort Bragg Region is comprised of the City of Fayetteville and an 11 county area surrounding the post
  - Projected regional population growth by 2013 of 71,709 (+7.4%)
    - 2010: 968,574
    - 2013: 1,040,283
- Fort Bragg is the major economic engine for the region
  - Contributes estimated \$4.1 billion annual impact to local communities
  - Generates retail sales of approximately \$2 billion for Cumberland County
  - Brings stability and growth to the regional economy





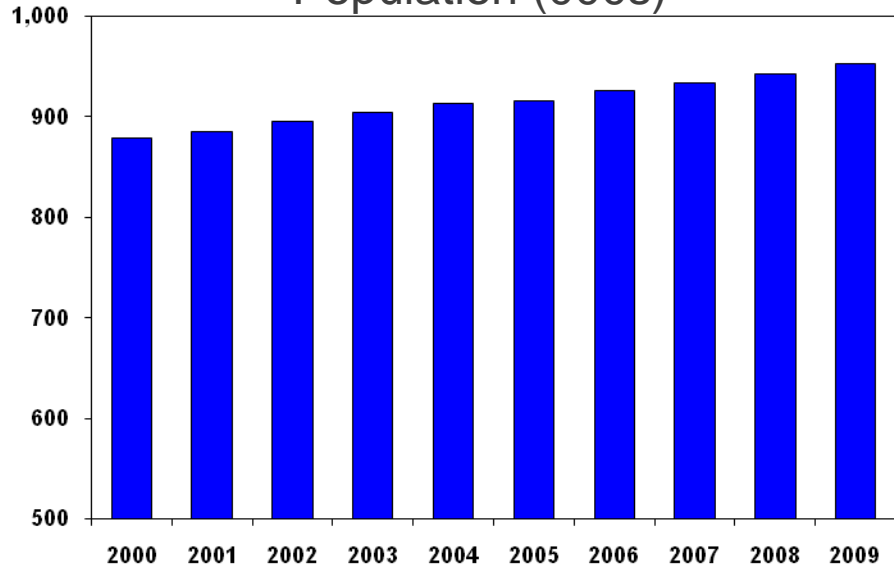
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## AIR SERVICE OPPORTUNITIES

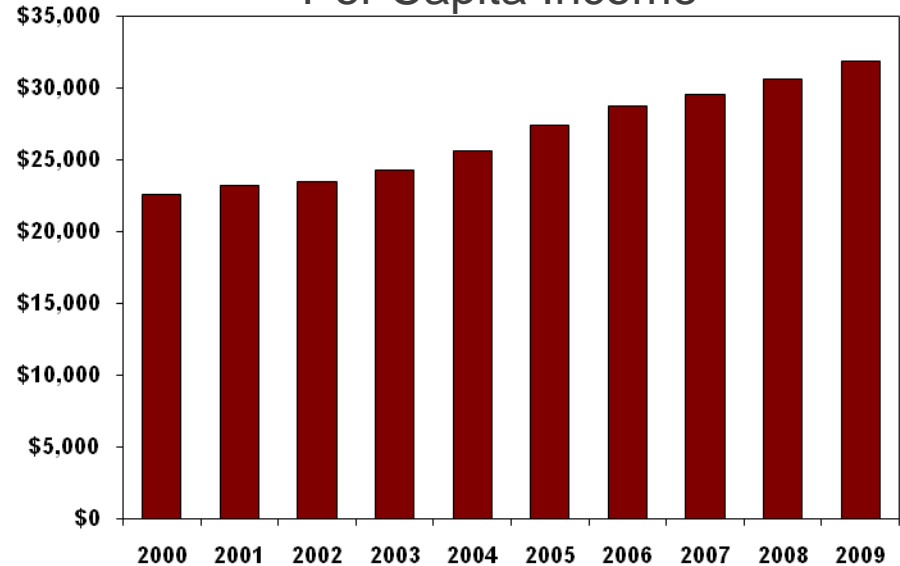
# The 11-County Fort Bragg Region has Experienced Steady Growth Over the Last Decade

Population (000s)



**Absolute Growth: 8.5%**

Per Capita Income



**Absolute Growth: 41.3%**

Source: Woods & Poole Economics, 2010





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## AIR SERVICE OPPORTUNITIES

### Fayetteville Regional Airport (FAY)

- Located 6 miles south of Fayetteville near the I-95 Corridor
- Serves Fayetteville and the Fort Bragg Region with scheduled flights by Delta Connection and US Airways Express
  - DL: 56 weekly departures to ATL
  - US: 53 weekly departures to CLT
- 2009 Enplanements: 229,480 passengers
- Passenger Enplanement Growth 2006-2009: 33%

Source: OAG April 2010 and U.S. DOT T-100 Reports.





## AIR SERVICE OPPORTUNITIES

# Fayetteville Regional Airport Facilities

- 2 Runways
  - Runway 4-22: 7,712 feet
  - Runway 10-28: 4,801 feet
- 7 Gates
  - Concourse B: 4 Gates with Jet Bridges
  - Concourse A: 3 Gates
- 11 Ticket Counters
- 1,125 Auto Parking Spaces
  - 165 Short-term
  - 960 Long-term



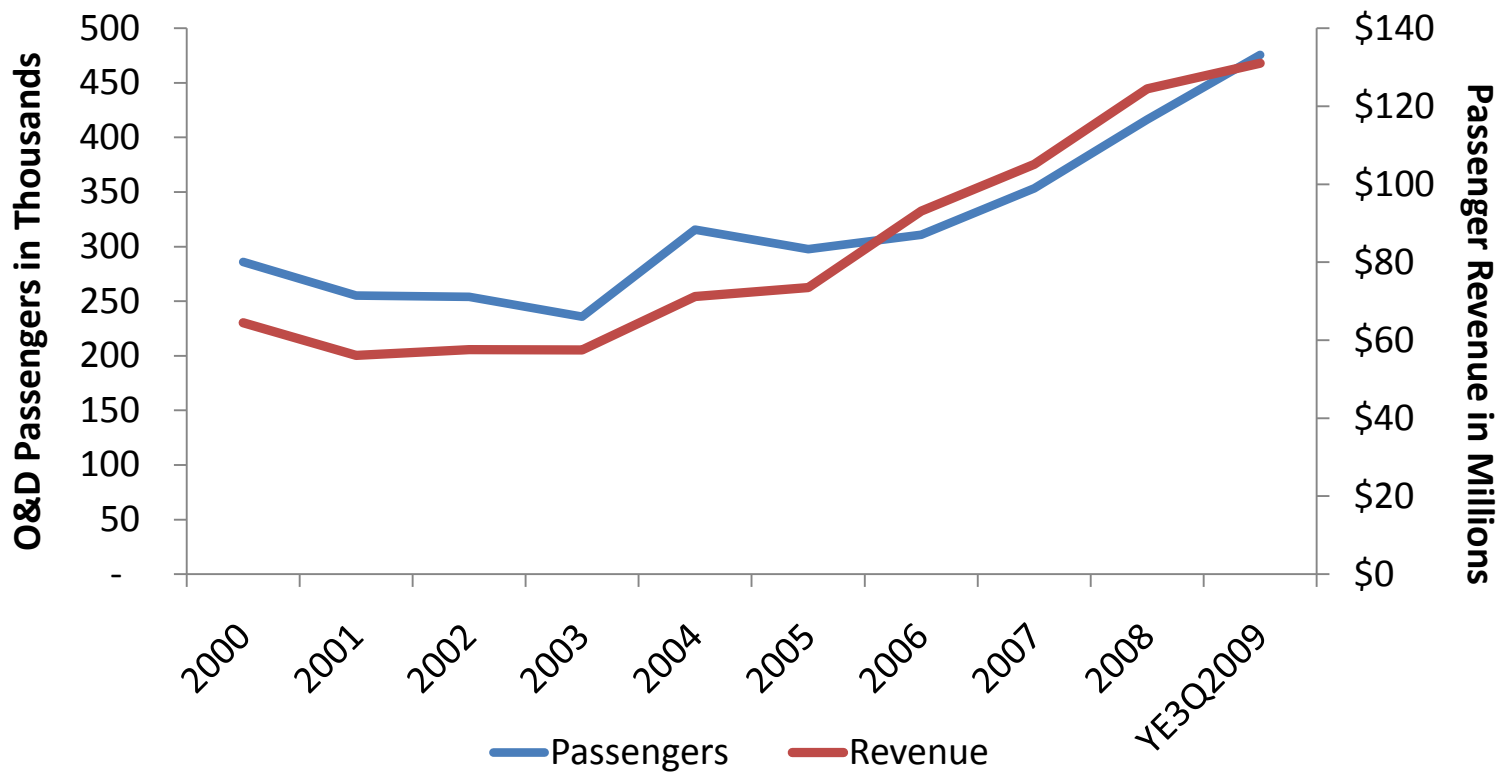


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## AIR SERVICE OPPORTUNITIES

# FAY Passenger Traffic and Revenue Trends



Since 2006, FAY Passenger traffic has Increased 12% per year, compared to annual 2% decline in U.S. traffic





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AIR SERVICE OPPORTUNITIES

# Fort Bragg and BRAC Impact





## AIR SERVICE OPPORTUNITIES

### Fort Bragg

- One of the largest and busiest military complexes in the world
  - Home to almost 10 percent of the Army's active component forces
  - Approximately 52,600 military and 20,400 civilian personnel work at Fort Bragg
- Fort Bragg is the “Home of the Airborne and Special Operations Forces”
  - XVIII Airborne Corps
  - 82nd Airborne Division
  - U.S. Army Special Operations Command
  - U.S. Army Parachute Team (Golden Knights)





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## AIR SERVICE OPPORTUNITIES

### Impact of BRAC on Fort Bragg Region

- Beginning in March 2011, **U.S. Army Forces Command (FORSCOM)** and **U.S. Army Reserve Command (USARC)** will move from Atlanta's Fort McPherson to Fort Bragg
- FORSCOM/USARC Headquarters will transfer approximately 3,000 positions to Fort Bragg
  - Senior decision makers that decide how to organize and equip the U.S. Army (active and reserve)
  - Manage more than **\$30 billion** of DOD budget annually
- Many defense-related companies have made the move or are in the planning stage to relocate to the Fort Bragg region





## AIR SERVICE OPPORTUNITIES

### Impact of BRAC on Fort Bragg Region

- FORSCOM/USARC relocations create workforce and economic opportunities in the Fort Bragg Region
- Potential to attract new defense related industry and expand existing businesses
- BRAC related population growth projected at **35,000 - 40,000** additional people
  - 18,000 in Cumberland County
- Opportunities: Additional jobs and, with a 4 star headquarters, defense related companies are moving to the region





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## AIR SERVICE OPPORTUNITIES

### Impact of BRAC on Fort Bragg Region

- **16,200 jobs** will be created as a result of growth at Fort Bragg
  - 4,024 active-duty military jobs;
  - 2,146 military civilian jobs;
  - 1,972 embedded contractor jobs;
  - 1,000 private defense contractors; PLUS
  - 7,044 jobs will be created in the local economy to support increased population and military spending
- Higher skilled workforce is needed to meet the needs of high tech, defense related emerging industries





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## AIR SERVICE OPPORTUNITIES

# FAY BRAC RTF Air Travel Surveys

- Business Travel -
- Personal Travel -





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## AIR SERVICE OPPORTUNITIES

# Business Travel Survey - January 2010 – Respondent Profiles

- 241 Qualified Survey Responses Representing 187 Companies and Organizations
  - 53% of Respondents from Fayetteville
  - 13% of Respondents from Fort Bragg
- 11 Respondents with 1000+ Employees
- 7 Respondents with 500-1000 Employees
- 19 Respondents with 100-500 Employees





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## AIR SERVICE OPPORTUNITIES

# Business Travel Survey – Companies/Organizations



**GENERAL DYNAMICS**



Booz | Allen | Hamilton

***NORTHROP GRUMMAN***



**communications**



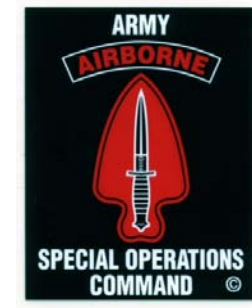


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## AIR SERVICE OPPORTUNITIES

# Business Travel Survey – Companies/Organizations





## AIR SERVICE OPPORTUNITIES

# Business Travel Survey – Top Ranking Air Travel Destinations

1. **Washington, DC**
2. Atlanta
3. New York
4. Tampa
5. Orlando
6. Dallas
7. Baltimore
8. Chicago
9. Boston
10. Las Vegas

**45% of Respondents  
Ranked Washington, DC as  
their #1 Destination**



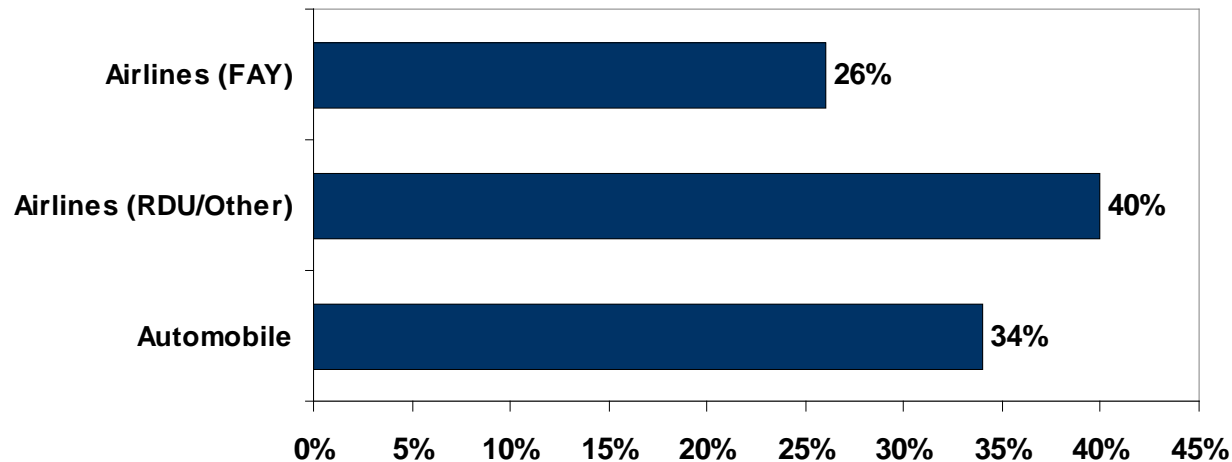


## AIR SERVICE OPPORTUNITIES

# Business Travel Survey – Fayetteville - Washington, DC Travel Profile

- 100% of Surveyed Companies Travel to Washington, DC
- 81% of Surveyed Companies have Visitors from Washington, DC that Travel via Airlines

### Mode Most Often Used for Washington-Baltimore Travel:





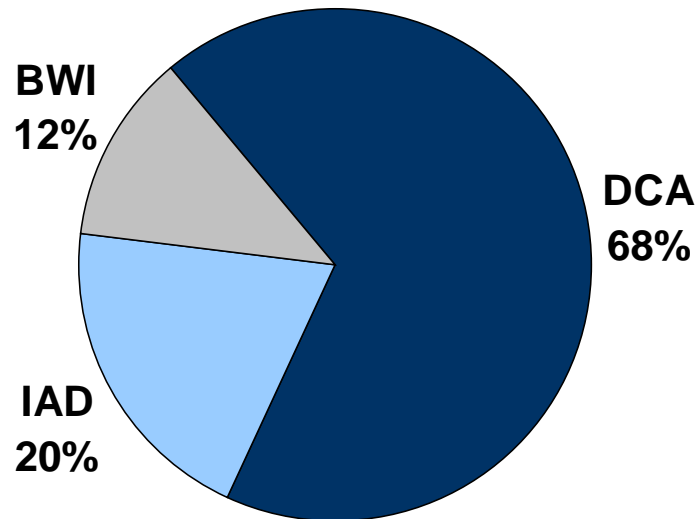
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## AIR SERVICE OPPORTUNITIES

# Business Travel Survey – Airport Preferences in Washington - Baltimore Area

### Responses to Naming #1 Choice Amongst Washington Area Airports:





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## AIR SERVICE OPPORTUNITIES

# Personal Travel Survey – Respondent Profiles

- 465 Qualified Survey Responses
  - 70% from Fayetteville
  - 28% from Nearby Cities and Counties
  - 2% from Washington, DC Area





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## AIR SERVICE OPPORTUNITIES

### Personal Travel Survey – Top Ranking Air Travel Destinations

1. **Washington, DC**
2. New York
3. Las Vegas
4. Orlando
5. Atlanta
6. Chicago
7. Tampa
8. Miami
9. Baltimore
10. Boston

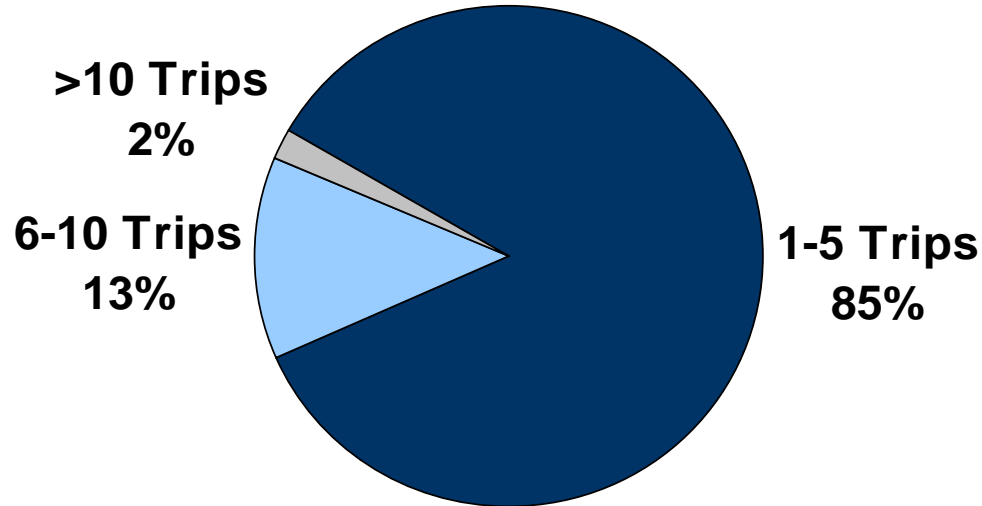
**83% of Respondents Visit  
the Washington, DC Area**





## AIR SERVICE OPPORTUNITIES

# Personal Travel Survey – Annual Personal Trips to Washington, DC - Baltimore Area by Individual Survey Respondents



**Respondents to the Personal Travel Survey Represent Approximately 1,400 Annual Trips to the Washington, DC - Baltimore Area**





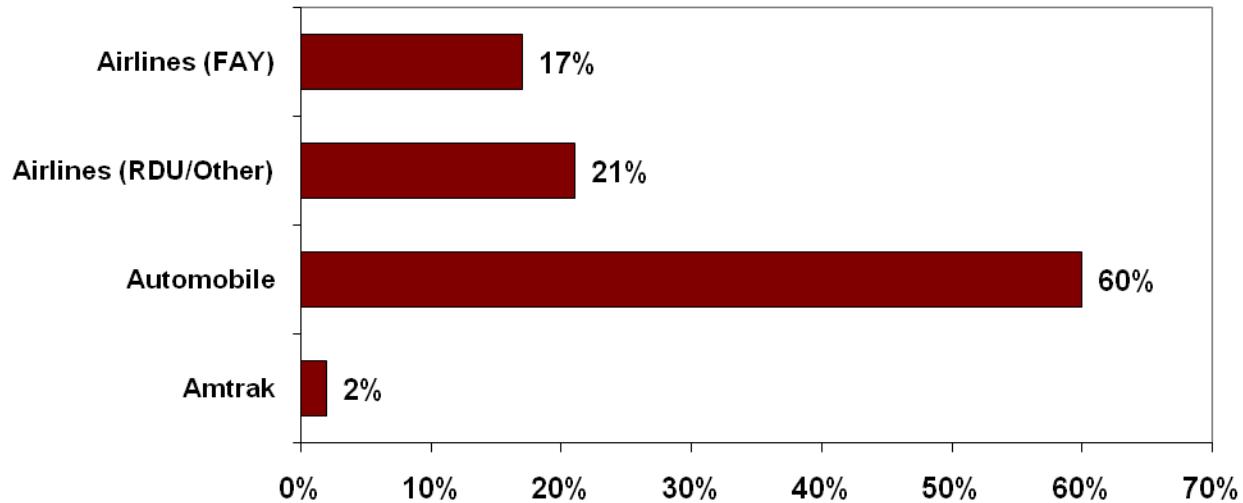
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## AIR SERVICE OPPORTUNITIES

# Personal Travel Survey – Fayetteville - Washington, DC Travel Profile

### Mode Most Often Used for Washington-Baltimore Travel:





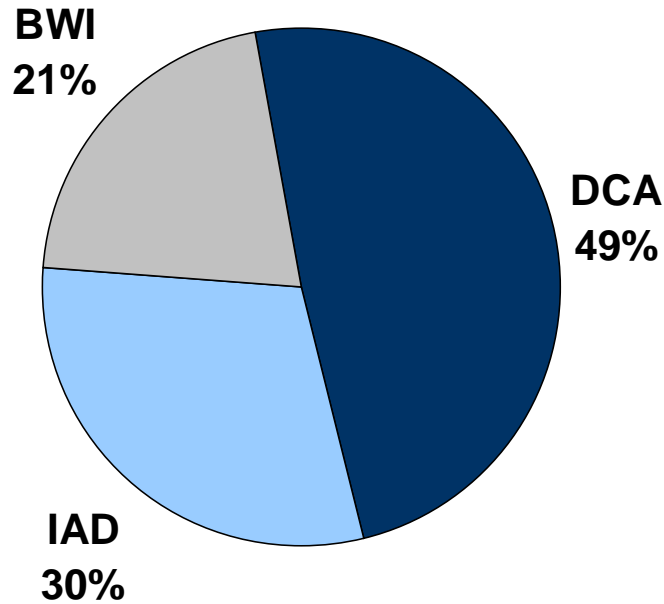
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## AIR SERVICE OPPORTUNITIES

# Personal Travel Survey – Airport Preferences in Washington - Baltimore Area

### Responses to Naming #1 Choice Amongst Washington Area Airports:





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## AIR SERVICE OPPORTUNITIES

# Traffic and Revenue Analysis of Proposed Fayetteville - Washington, DC Nonstop Service



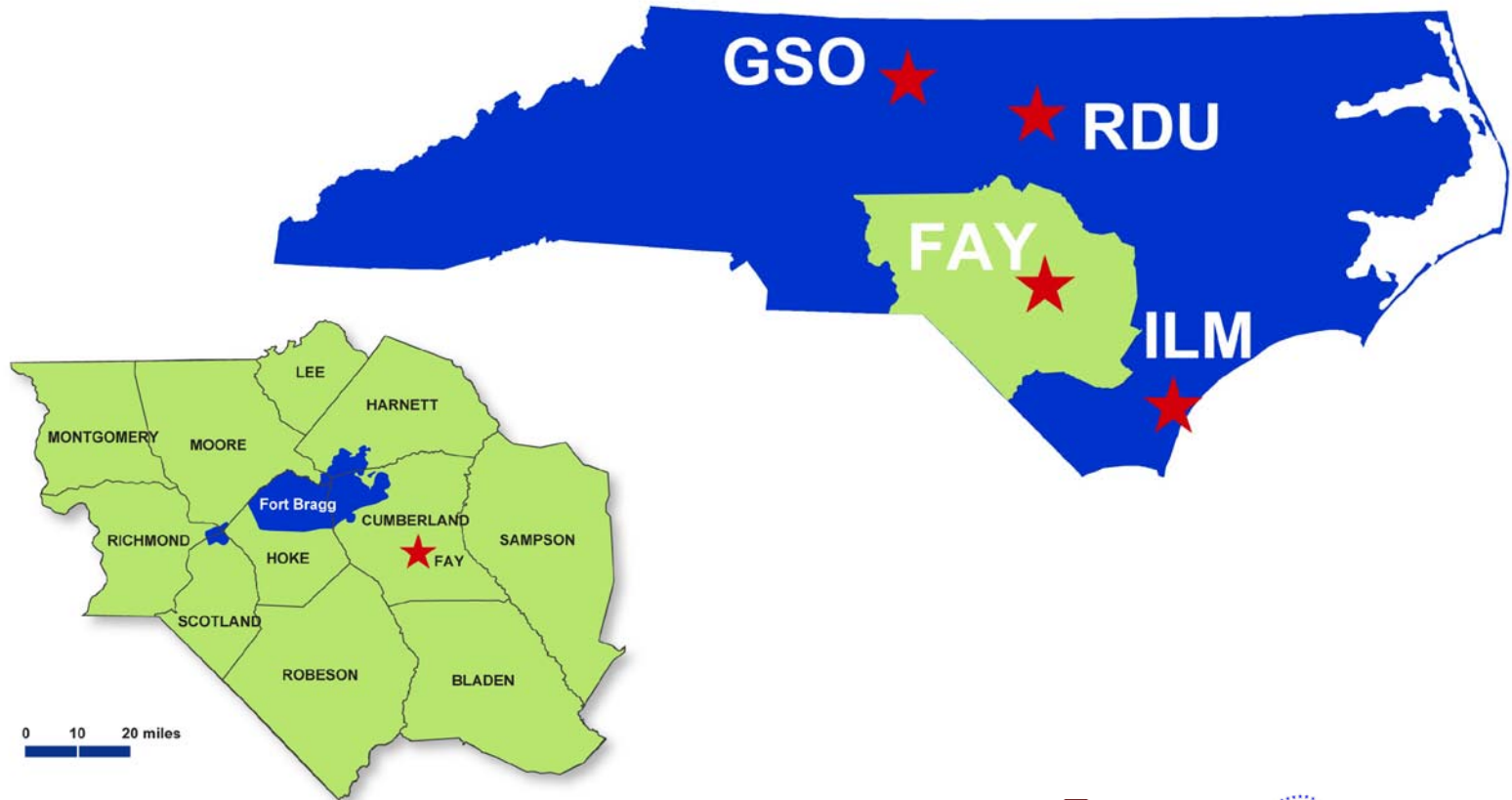


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## AIR SERVICE OPPORTUNITIES

# The air service market at Fayetteville and the Fort Bragg Region is part of a multi airport market





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## AIR SERVICE OPPORTUNITIES

# Nonstop Washington, DC Services at Other Airports Lead to Understated Demand in the FAY-WAS Market

Origin	Washington Market	Departures	Apr 2010 Seat Departures
GSO	DCA	57	2,850
	IAD	90	4,996
RDU	DCA	371	16,039
	IAD	149	14,492

**Drive times:**  
**FAY-RDU 1:26**  
**FAY-GSO 2:10**

Note: For purposes of this analysis, the Washington, DC Market is defined as passengers traveling to/from DCA and IAD.

Source: OAG iNet Schedules



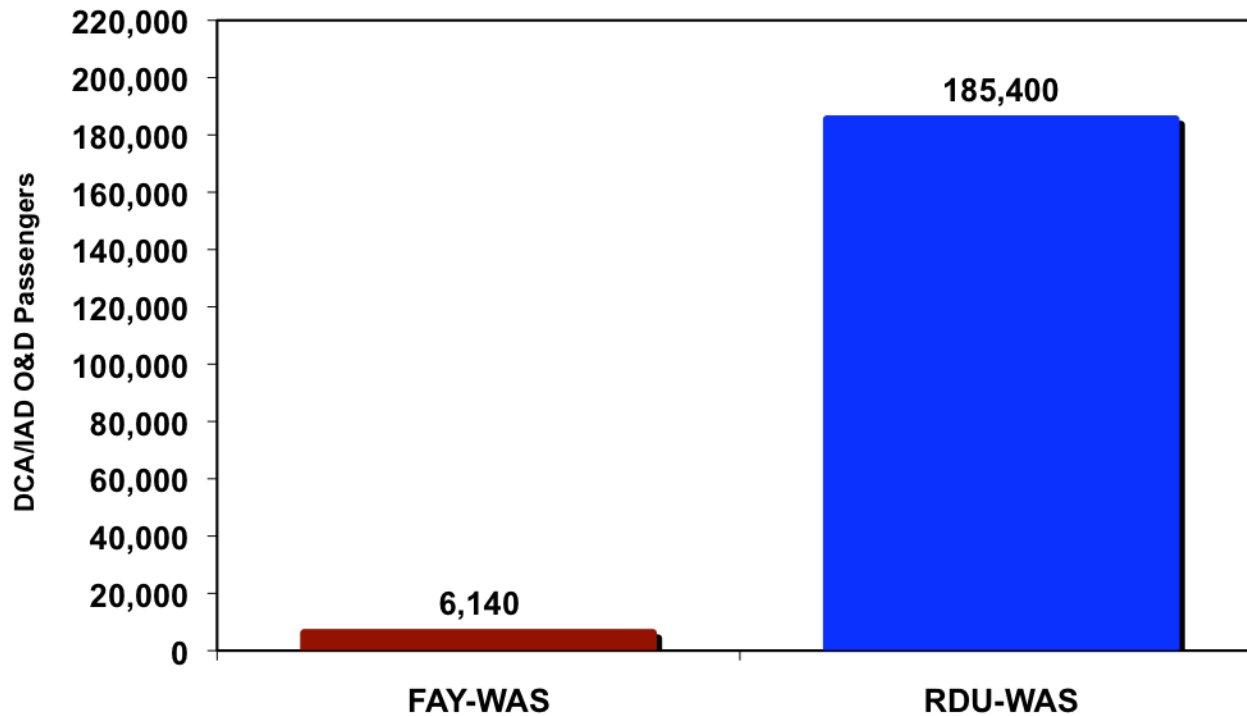


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## AIR SERVICE OPPORTUNITIES

# Passenger Traffic Reported in the FAY-WAS Market is a Fraction of the RDU-WAS Traffic



Source: US DOT O&D Survey, YE 3Q2009





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## AIR SERVICE OPPORTUNITIES

# Establishing the True Demand in the Fayetteville - Washington, DC Market





## AIR SERVICE OPPORTUNITIES

### **To Establish the True Demand in the FAY-WAS Market, Four Independent Analytical Methodologies were Employed**

- Method 1: Demand Density Analysis where relationships between population and air travel demand are identified for Fayetteville and peer communities
- Method 2: Fort Bragg Region Air Transportation Surveys of business and personal travelers provide insights into current demand patterns
- Method 3: Fort Bragg Travel Analysis provides understanding of travel demand at the region's economic epicenter
- Method 4: Common Catchment Area Analysis where demand estimation considers the dynamics of a multiple airport system



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AIR SERVICE OPPORTUNITIES

# True Demand Estimation

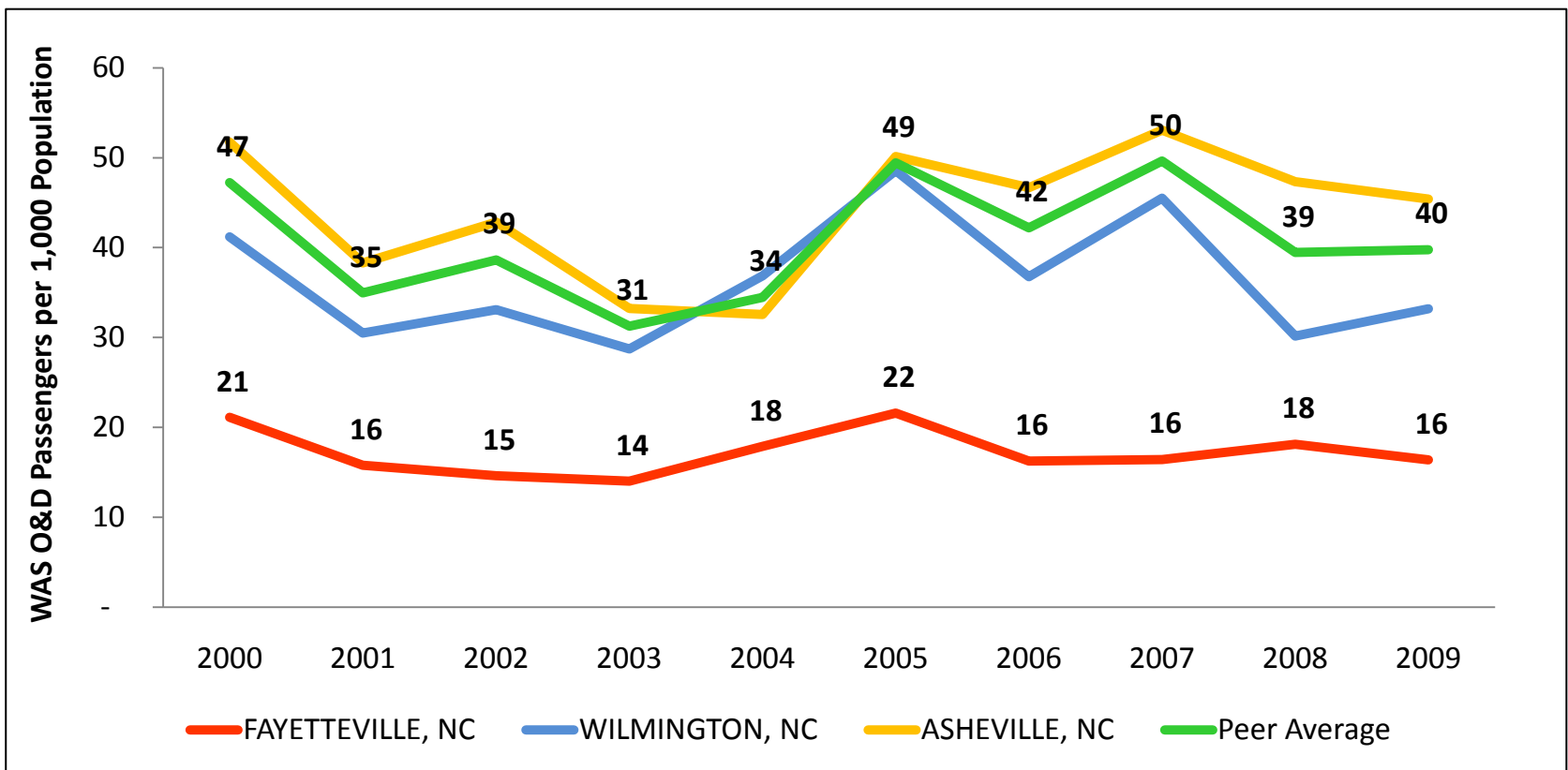
## Method 1: Demand Density Analysis





## AIR SERVICE OPPORTUNITIES

**Based on Reported Statistics, Fayetteville Generates an Average of 57 Percent Fewer Passengers than Peer Communities Without Nonstop Washington, DC Services**



Note: Peer communities chosen based on similarities to Fayetteville in terms of distances from DCA and MSA populations.  
 Source: US DOT O&D Survey, Woods & Poole Economics 2010



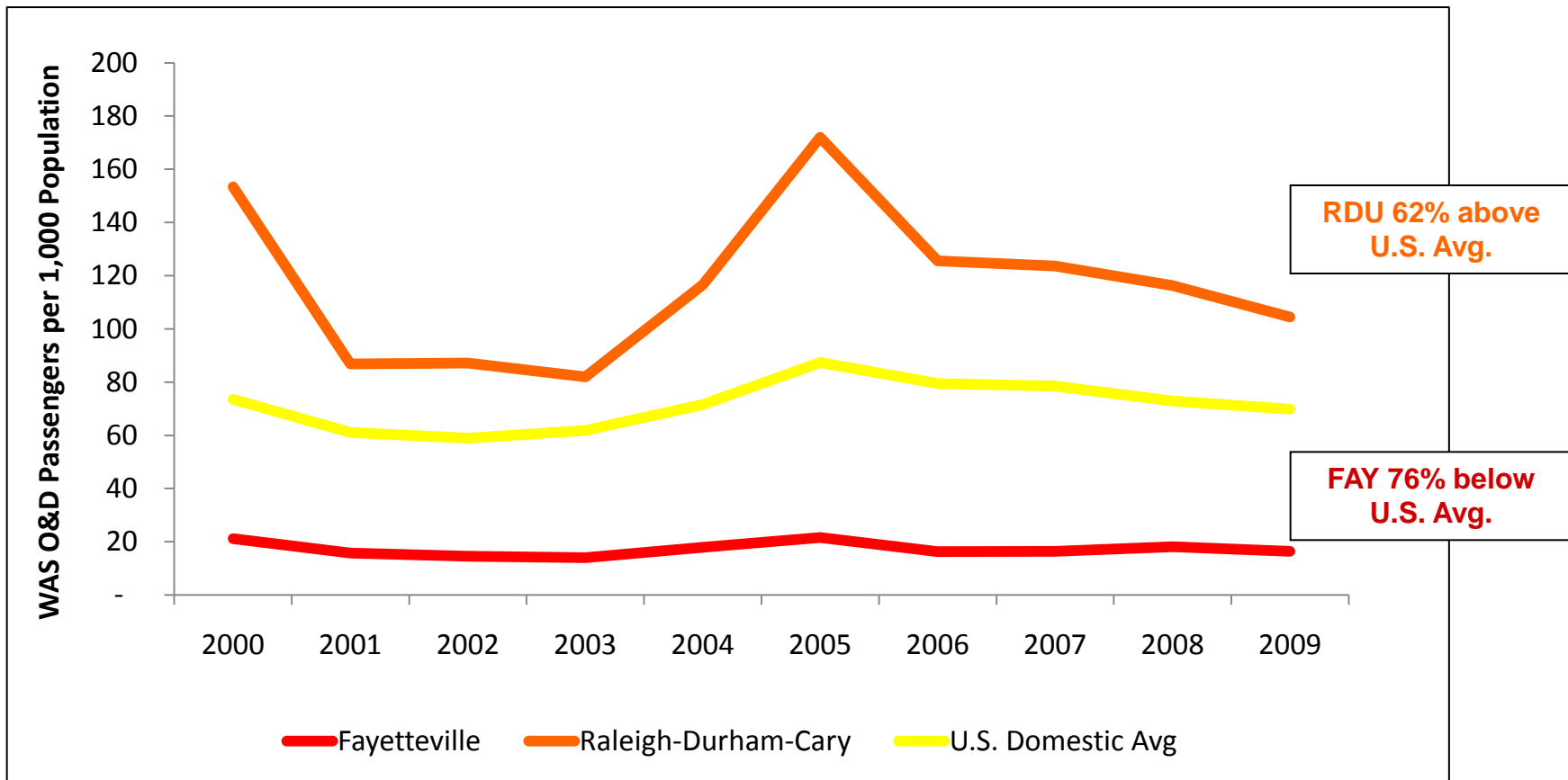


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## AIR SERVICE OPPORTUNITIES

# There are Clear Signs of Leakage Between FAY and RDU in the Washington, DC Market



Source: US DOT O&D Survey, Woods & Poole Economics 2010





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## AIR SERVICE OPPORTUNITIES

### Method 1: Demand Density Analysis Summary

- Airports in Fayetteville's **peer communities** without WAS nonstop services generated an annual average of **40 passengers per 1,000 population**
- Based on the Fayetteville MSA population and reported FAY O&D statistics, **Fayetteville** has a current annual average of **16 passengers per 1,000 population**
- **Applying the peer average Demand Density** to Fayetteville equates to approximately **14,300 passengers** annually for the Fayetteville–Washington, DC market





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AIR SERVICE OPPORTUNITIES

# True Demand Estimation

## Method 2: Fort Bragg Region Air Transportation Surveys





## AIR SERVICE OPPORTUNITIES

# Fort Bragg Region Air Transportation Surveys

- The Fort Bragg Region Air Transportation Surveys revealed that **59 percent** of those traveling to/from Washington, DC by air **utilize RDU and airports other than FAY**

<u>Airports used for Washington-Baltimore Air Travel</u>	<u>Personal</u>	<u>Business Local Employees</u>	<u>Business Visitors</u>	<u>Total</u>	<u>Airport Share of Total</u>
Airlines via FAY	239	790	1,885	2,914	41%
Airlines via RDU and other airports	288	1,240	2,686	4,214	59%
Total	527	2,030	4,571	7,128	100%

- Based on this leakage factor, the estimated FAY–WAS air travel market is estimated at **14,400 passengers** annually

Note: Figures in table represent one-way trips for Washington, DC travelers.





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## AIR SERVICE OPPORTUNITIES

### Fort Bragg Region Air Transportation Surveys

- Survey respondents indicated that 38% of Washington, DC travel is via automobile/rail
- Based on this survey data, 75% of travelers by all modes in the Fayetteville–Washington, DC market utilize options other than FAY
- Using this leakage factor, the total Fayetteville–Washington, DC market is comprised of **23,200 travelers** annually





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AIR SERVICE OPPORTUNITIES

# True Demand Estimation

## Method 3: Fort Bragg Travel Analysis





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## AIR SERVICE OPPORTUNITIES

### Fort Bragg Travel Analysis

- Air travel reports from the Fort Bragg Commercial Travel Office indicate that 67 percent of personnel traveling to Washington, DC utilize RDU; 33 percent utilize FAY
- Based on this analysis, the estimated Fayetteville–Washington, DC market is **17,700 passengers** annually





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AIR SERVICE OPPORTUNITIES

# True Demand Estimation

## Method 4: Common Catchment Area Analysis





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## AIR SERVICE OPPORTUNITIES

### Common Catchment Area Analysis

- Combined, the FAY and RDU generated 186,110 Washington, DC O&D passengers in CY2009
- The Fayetteville MSA and Raleigh CMSA have similar personal per capita income levels
  - Fayetteville = \$38,351; Raleigh = \$39,674
- Fayetteville MSA's population of 359,600 represents 21 percent of the combined Fayetteville MSA + Raleigh CMSA population of 1,726,510
- If FAY could draw an equivalent 21 percent share of the combined area's Washington, DC O&D, the market would total 38,800 passengers annually





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## AIR SERVICE OPPORTUNITIES

# Summary of Results by Methodology

True Demand Estimation Methodology	FAY–WAS Market	
	Annual Passengers	Passengers Per Day Each Way (PDEW)
Method 1: Demand Density Analysis	14,300	20
Method 2: Fort Bragg Region Air Transportation Surveys		
- Travelers via Air	14,400	20
-Travelers via Air/Auto/Rail	23,200	32
Method 3: Fort Bragg Travel Analysis	17,700	24
Method 4: Common Catchment Analysis	38,800	53

**Clearly, the reported FAY–WAS O&D market of 6,140 annual passengers (8 PDEW) is severely understated**





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## AIR SERVICE OPPORTUNITIES

### True Demand Estimation of Existing Market and Expected Net New Traffic Due to BRAC

- Based on a review of the various demand estimates, the **existing FAY–WAS market** is likely **22,500 annual passengers**
- Analysis of **FORSCOM/USARC** air travel in the Washington, DC market indicates an **additional 17,300 annual passengers**

**The Fayetteville–Washington, DC market totals  
39,800 annual passengers (55 PDEW)**





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## AIR SERVICE OPPORTUNITIES

### Fayetteville–Washington, DC Market: Segmentation by Airport and Revenue Potential

- Existing Market
  - FAY–DCA: 14,800 passengers; \$5.3 million in revenue
  - FAY–IAD: 7,700 passengers; \$2.4 million in revenue
- FORSCOM/USARC Market
  - FAY–DCA: 14,800 passengers; \$1.9 million in revenue
  - FAY–IAD: 2,500 passengers; \$0.7 million in revenue
- **Total Market**
  - **FAY–DCA: 29,600 passengers; \$7.3 million in revenue**
  - **FAY–IAD: 10,200 passengers; \$3.1 million in revenue**

Note: Revenue estimated based on CY2009 average fare for FAY-WAS.

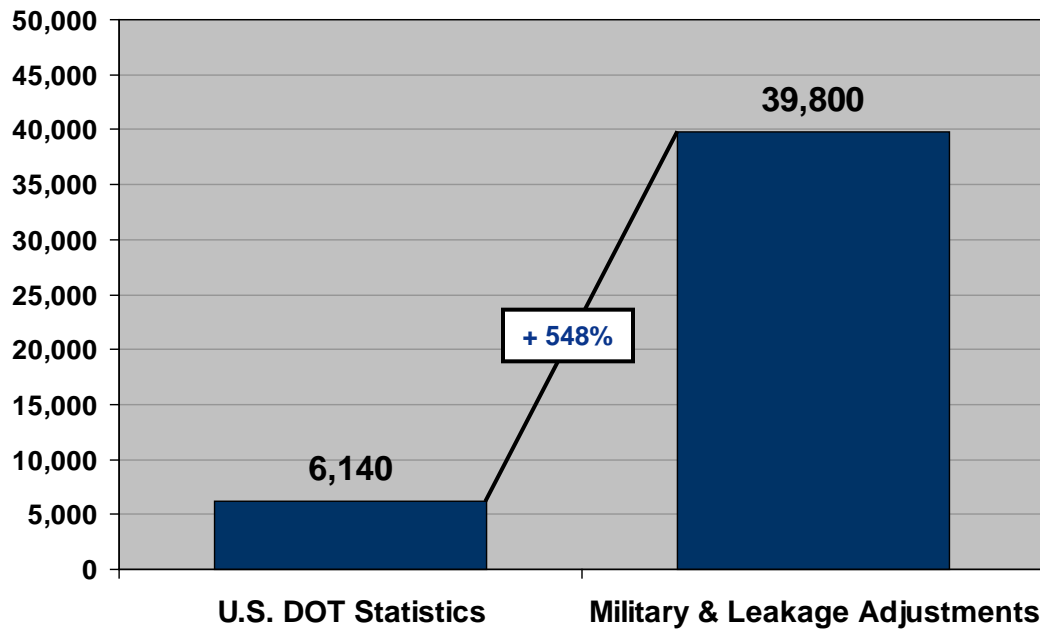




## AIR SERVICE OPPORTUNITIES

# The U.S. DOT Statistics Severely Understate the Size and Potential of the Fayetteville – Washington, DC Market

### FAY – DCA/IAD Passenger Market



Passenger Enplanements





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AIR SERVICE OPPORTUNITIES

# The Opportunity for US Airways and United Airlines in the Fayetteville/Fort Bragg Region



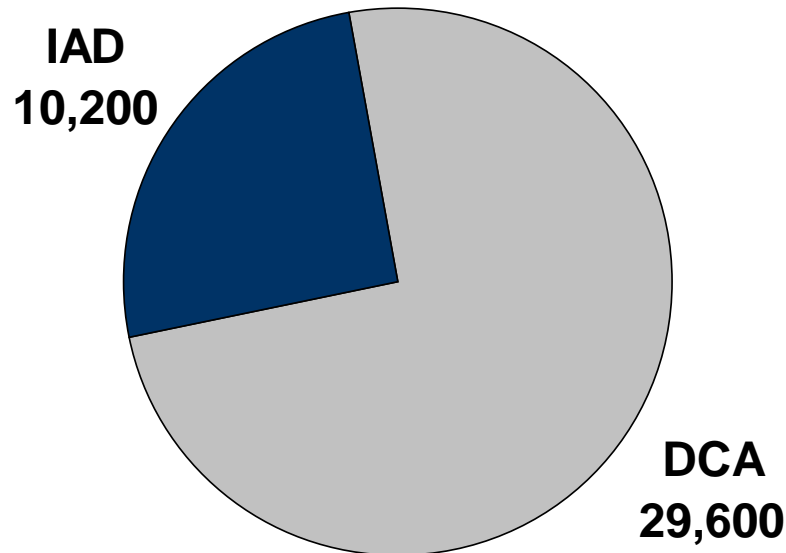


## AIR SERVICE OPPORTUNITIES

### Local Market Potential of a FAY-IAD Service

- FAY–Washington, DC local market generates 39,800 passengers
- FAY–IAD represents 26 percent of the local Washington, DC market

FAY-Washington, DC O&D Passengers



Source: US DOT O&D, YE3Q2009 Passenger data adjusted by InterVISTAS based on O&D Survey, Ft. Bragg and Ft. McPherson data





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## AIR SERVICE OPPORTUNITIES

### The Opportunity: US Airways Nonstop FAY-DCA Service

- US Airways would immediately capture existing passengers that currently travel via RDU on other airlines
- US Airways would be positioned to serve the new FAY-WAS travelers that will result from BRAC
- US Airways would defend against possible new entrants that could compete for US Airways' current FAY passengers that fly via CLT to Washington, DC and a multitude of other markets





## AIR SERVICE OPPORTUNITIES

# Thousands of FAY-WAS Passengers are Currently Leaving to RDU and Traveling on Airlines Other than US Airways

- American, United and US Airways provide frequent, nonstop service at RDU to both DCA and IAD

Market	Carrier	Daily Departures
DCA	AA	7
DCA	US	6
IAD	UA	5



U-S AIRWAYS



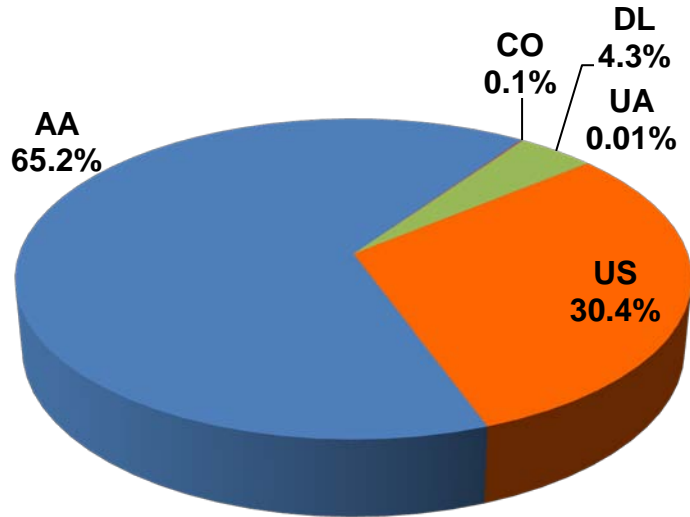


## AIR SERVICE OPPORTUNITIES

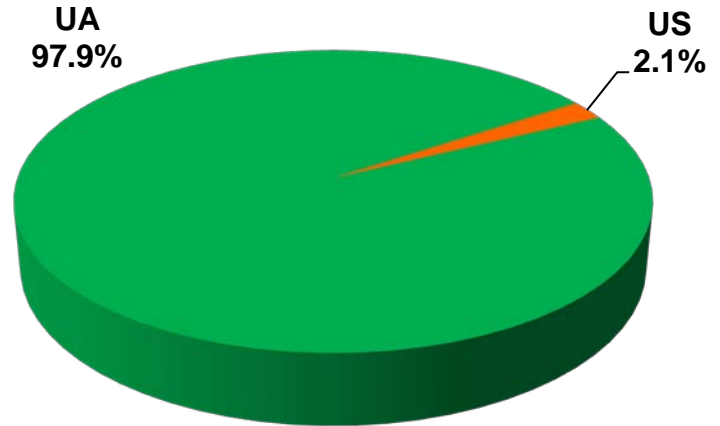
# Thousands of FAY-WAS Passengers are Currently Leaking to RDU and Traveling on Airlines Other than US Airways

RDU-Washington, DC O&D Passengers

RDU-DCA



RDU-IAD



U-S AIRWAYS





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## AIR SERVICE OPPORTUNITIES

# With FAY-IAD Service, United has the Opportunity to Access Substantial Local and Connecting Passenger Traffic

- Large local FAY-WAS market supported by a growing base of military passengers
- FAY-Beyond IAD passengers to many domestic and international markets





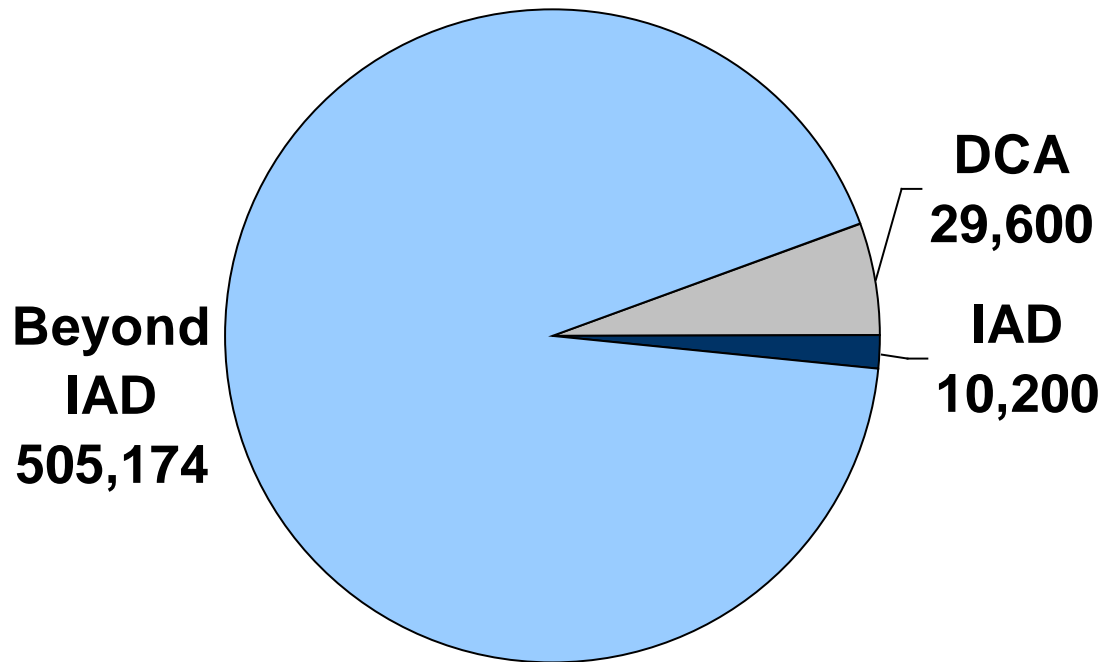
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## AIR SERVICE OPPORTUNITIES

# With Service at FAY, United Would Compete for Over 500,000 Passengers in Markets that Connect at IAD

Local and Beyond IAD O&D Passengers



Source: US DOT O&D, YE3Q2009 Passenger data adjusted by InterVISTAS based on O&D Survey, Ft. Bragg and Ft. McPherson data  
Connecting markets included are within 150% circuitry





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## AIR SERVICE OPPORTUNITIES

# FAY Passengers Could Connect to 25 International Markets on United's Network at IAD

- Connecting international passengers account for almost 54,000 passengers – equaling 11 percent of total potential connecting passengers at IAD
- Top FAY international markets that could connect via IAD:
  - Frankfurt
  - Kuwait
  - Dubai
  - London
  - Munich
  - Brussels
  - Amsterdam
  - Paris

Source: US DOT O&D,  
YE3Q2009 Passenger data adjusted by InterVISTAS  
based on O&D Survey, Ft. Bragg and Ft. McPherson data





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AIR SERVICE OPPORTUNITIES

# Fayetteville Regional Airport New Air Service Incentives





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## AIR SERVICE OPPORTUNITIES

### The FAY Air Service Incentive Policy

- Designed to foster growth and support new non stop services in un-served markets
- One-year program
- Waiver of landing fees to aircraft serving the new market
- Free use of second level loading bridges in Concourse B
- Local advertising campaign, up to \$50,000 over a twelve month period.
- Free auto parking for employees and flight crews

Source: Fayetteville Regional Airport Policy adopted February 23, 2010



Fayetteville



FAYETTEVILLE REGIONAL AIRPORT - WASHINGTON D.C.  
AIR SERVICE OPPORTUNITIES

