New Hampshire State Airport System Plan

Regional Meetings

McFarland Johnson

THE Louis Berger Group, INC.

NH STATE AIRPORT SYSTEM PLAN
Agenda

- System Plan Background
- Process and Key Findings
- System Recommendations
- Economic Benefits
- Next Steps
Previous System Plan

- Completed in 2003
- Economy and Aviation Have Changed
- Addressing Operational and Financial System Needs
- Highlighting Economic Contribution of Aviation System for NH
NHSASP Goals & Objectives

- Maximize Economic Value of NH’s Airport System
- Provide a Safe, Secure and Efficient Aviation System
- Promote and Educate the Importance of the State’s Aviation System
- Enhance, Preserve, and Maintain State Aviation System Assets
- Maximize Diverse Connectivity for State’s Aviation Users
Process
Elements of the System Plan

- Evaluation Criteria and Defining Airport Roles
- Comprehensive Inventory Process
- Developing Aviation Forecasts
- Assessing Existing Statewide Airport Performance
- Defining Future Statewide Airport Performance
- System Recommendations
- Economic Analysis
Airport
Recommendations
Recommendations Background

- **Airport Recommendations**
  - System Plan = Supporting Planning Document
  - Master Plans Provide Detail and Justification
    - Current ALP Still Required to Fund Projects
  - Projects Phased Over Twenty Year Planning Period

- **System Recommendations**
  - Statewide Initiatives and Strategies
  - Best Practices
  - Airport Management Tools
Development Costs Breakdown

Total $77,475,000

- Airside: $34,832,000
- Landside: $19,939,000
- Visual/Navigational Aids: $5,554,000
- Studies/Surveys: $3,313,000
- Basic: $14,636,000
- Regional: $14,636,000
- National: $7,742,000

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Other Airport Funding Needs

- Projects in Addition to SASP - $372,250,000
  - $138.9 Million Primary, $94.4 Million Block Grant
    - Additional Hangars/aprons/taxiways
    - Passenger terminal facilities/infrastructure
    - Additional vehicles/equipment (ARFF/SRE)

- Pavement Maintenance - $51,500,000
  - Notable cost over 20-year period

- Planning/envi/specialty studies - $8,000,000

TOTAL 20-YEAR AVIATION NEED IS APPROX. $500,000,000
System Recommendations
Funding Program Needs

- **FAA Funding**
  - NH Has: 11% of NPIAS Airports and 10% of Funding in NE
  - $15 Million Annual Average 2009 - 2014
  - Annual Levels Fluctuate - $4M - 2014, $30M – 2011

- **Other Funding (Non-NPIAS)**
  - RSA 422:36 Airways Toll Moneys; Aircraft Operating Fee Revenues – ¼ Turnback
  - 80/20 Funding Program – Unfunded
  - Airport Tax Reimbursement Program – Unfunded
  - Fuel Revenue – General Fund
  - State Aeronautical Fund – Donations ($1,100)
Funding Program Needs (Cont.)

- **Recommendations:**
  - Plan on Limited Funding Being A Reality
  - Prioritize Projects – Meet Both System Recommendations and Local Needs
  - Maintain Registration Fee Turnback – Airports Depend on for Budgeting
  - Refocus Efforts to Refund 80/20 Program (Legislative)
  - Research Funding Programs In Other States
Policy Development

- North Conway Airport Coverage Gap Options
  - Modify Bi-State Authority
  - Build New Airport ($15M - $20M Investment)

- Airport Land Use Planning & Zoning

- FAA Airport Design Standards Recommendations for Non-NPIAS Airports

- Equipment Purchases – Evaluate Options to Purchase Equipment for System Use

- Unmanned Aerial Systems (UAS)
Airport Tools/Resources

- Airport Strategy Guidance – Maximize Aviation and Non-Aviation Revenue Generation
- Environmental Background – Understand the Federal and State Level Processes, Wildlife Hazards, Vegetation Management
- Airport Management – Guidance on Strategies to Manage and Operate Airports
- Safety and Security – Best Practices Including TSA Recommendations
- Checklists for All Airports
  - Airport Emergency Plans
  - Airport Self Inspections
Economic Impact
Methodologies & Assumptions

- IMPLAN Model Used to Calculate the Multiplier Effect
- On-Airport Employment – Surveys
- Airport Capital Spending – NHDOT & Airport Management Survey
- Airport & Tenant Operations and Maintenance Spending; Surveys & Similar Airport Data
- Visitors & Visitor Spending – Visitor Surveys & MHT Data *(Extrapolated)*
- Travel Time Savings *(For Both General Aviation & Commercial Service Airports)*
  - Average Number Of Passengers Per Business Flight
    • 3.4
  - Travel Time Savings
    • 2 Hours to & from Their Destination
  - Value Of Travel Time
    • $59/Hour
- Assumptions Considered Data Collected from NH & Recent Industry/Economic Studies Conducted in New England
# Total Economic Impact of NH Aviation

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<tr>
<th></th>
<th>New Hampshire Businesses</th>
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<th>NH State Tax Revenues</th>
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<td><strong>Aircraft Registration</strong></td>
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<td><strong>Total NHSAS</strong></td>
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<td><strong>Grand Total</strong></td>
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Next Steps
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- Individual Airport Summaries
- Final Report Production
- Completion of Regional Meetings
- Posting Final Report on Bureau of Aeronautics Website:

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