

Terminal Area Forecast

Presented to: Communications Conference,
FAA Southern Region

By: J. Peter LeBoff

Date: January 29, 2009



Federal Aviation
Administration



Overview

- Terminal Area Forecast
- Aviation Growth Factors
- Forecasts for the U.S.
- Forecasts for Southern Region
- Summary



What is the TAF

- Database Containing Annual Historic and Unconstrained Demand and Activity Forecast by Airport
- Includes All NPIAS Airports (About 3,400)
 - FAA and Contract Towers
 - Non-FAA Towered Airports
 - Non-towered Airports
- Updated on an Annual Basis
- The Official FAA Forecast



TAF is used for:

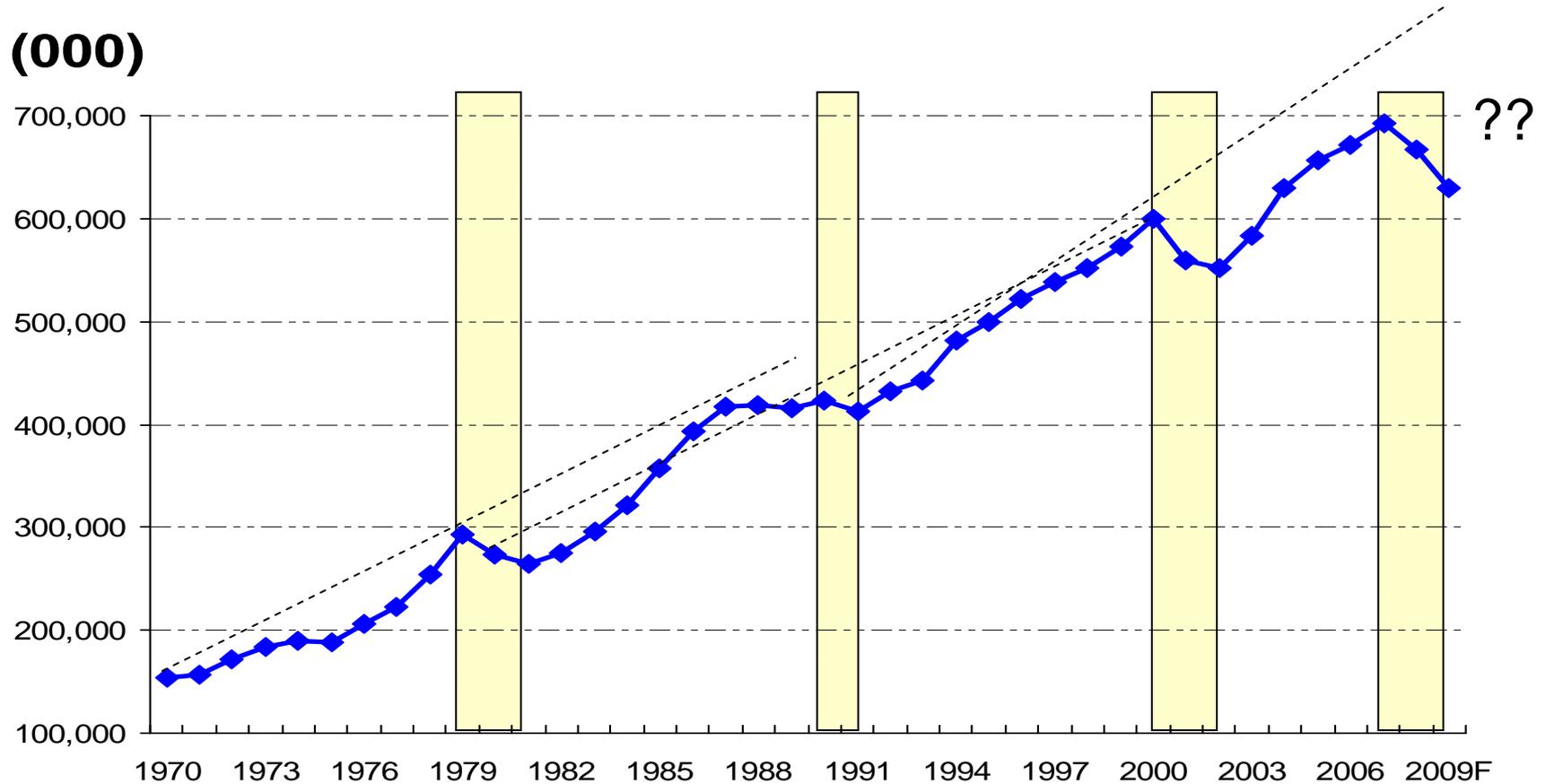
- Staffing and budgeting
 - Basic input for controller staffing levels
 - Staffing levels and capital needs determine the budget needs
- Airport and capacity planning
 - Master Plan and EIS forecasts compared against TAF
 - Federal Contract Towers Benefit/Cost analysis
- NAS plan development
 - Capital investment analysis
 - NextGen analysis and development



Forecast Methodology by Group

- OEP 35
 - Near term based on schedules and seasonality
 - Long term based on econometrics
- Second Tier
 - Near term based on schedules
 - Long term total enplanements based on econometrics
- Other FAA & Contract Towers
 - Trend analysis
- Non-Towers
 - No growth
 - FAA Regional Input

US Airline Domestic Enplanements



Source: Air Transport Association

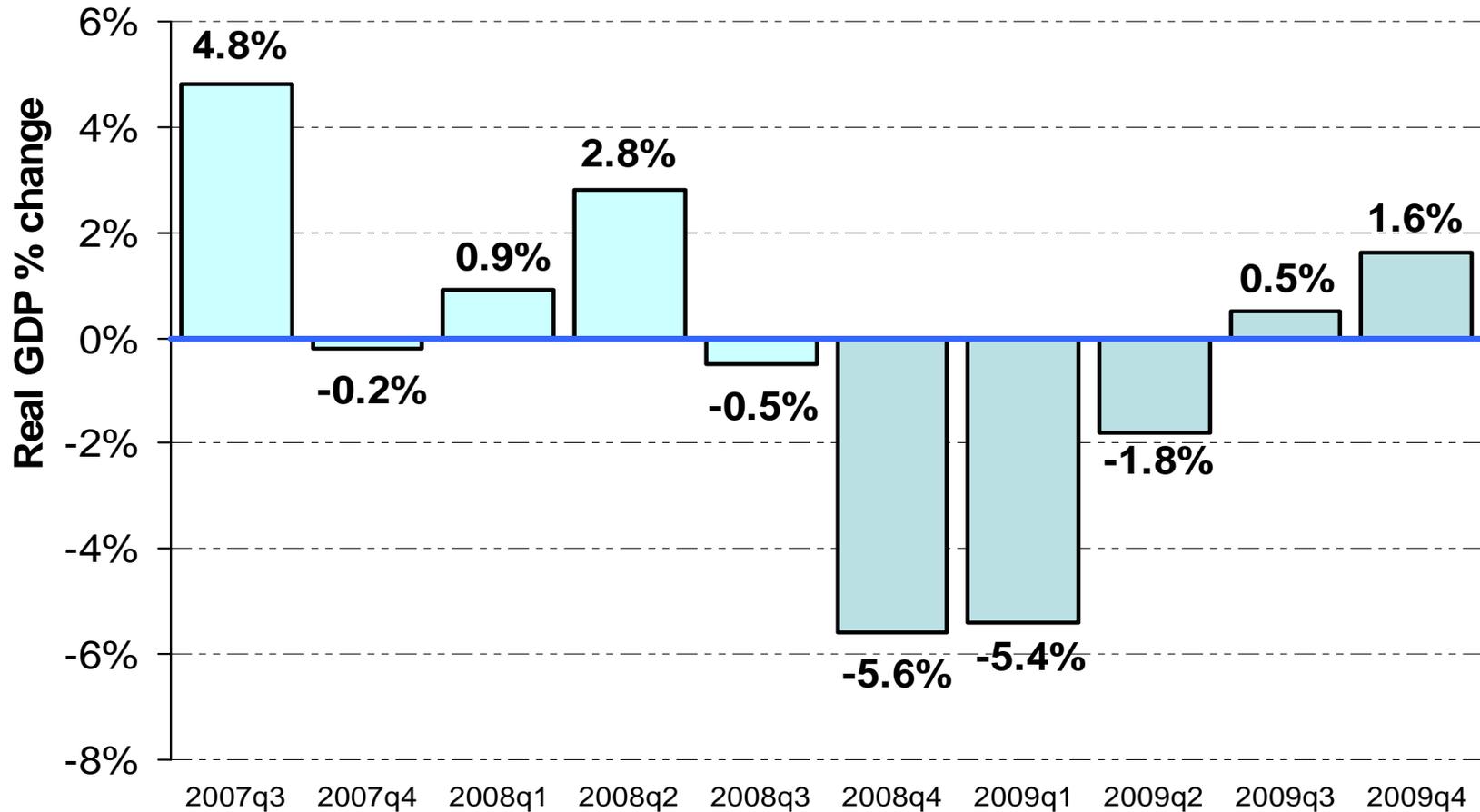


Factors Driving Previous Traffic Recoveries

- Economy
- Yield
- Security



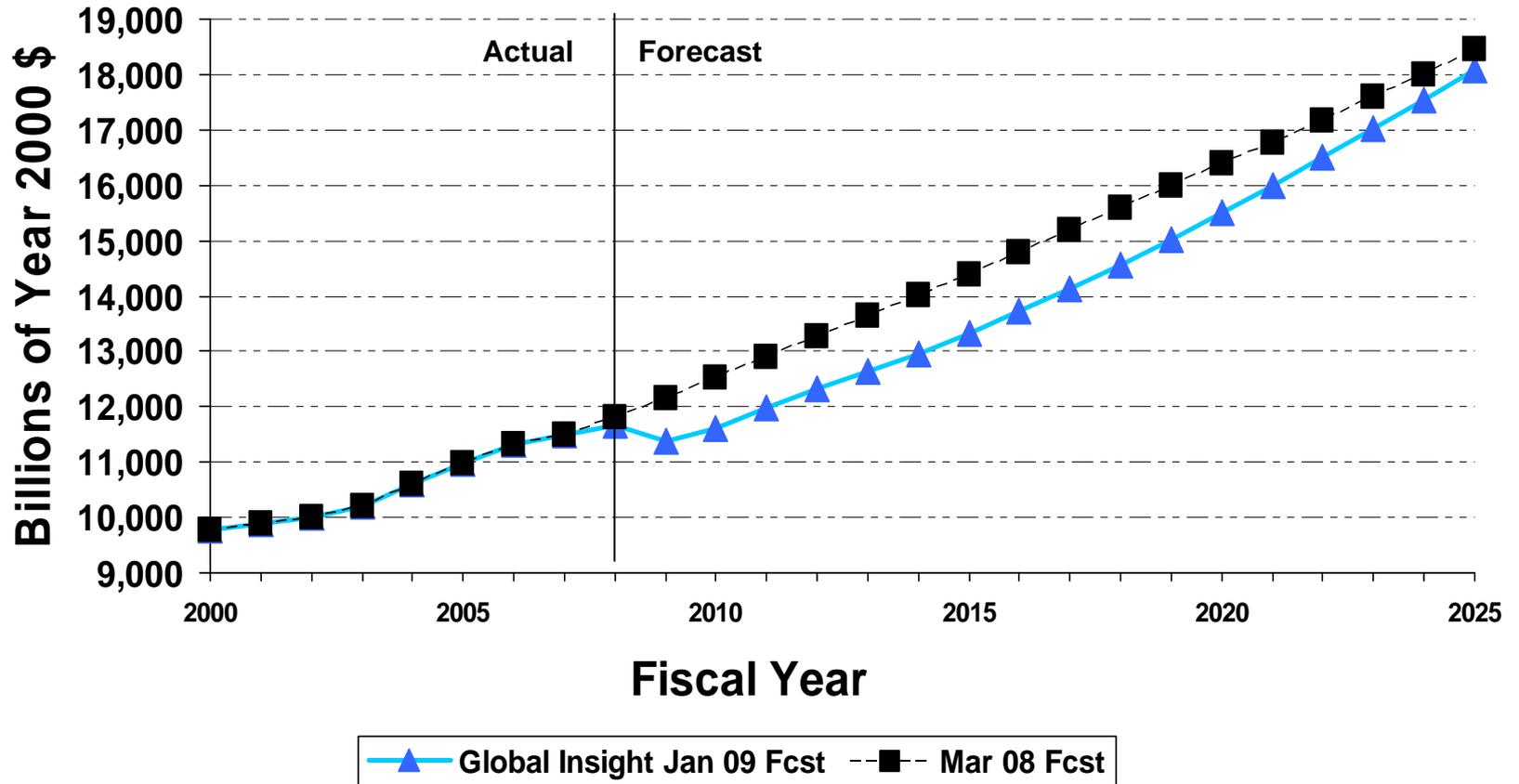
The US economy will contract



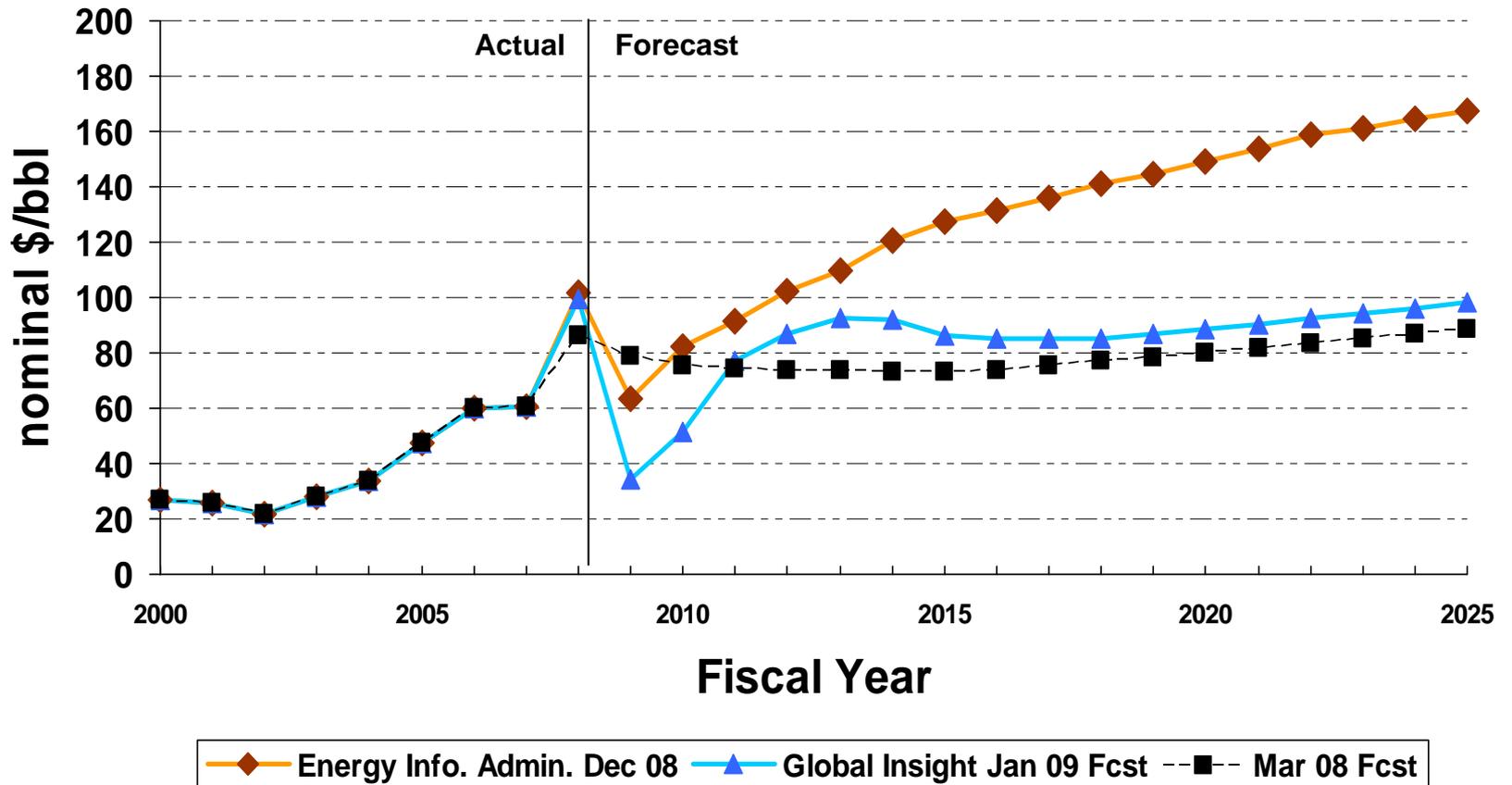
Source: Global Insight, Jan 2009



US Real GDP



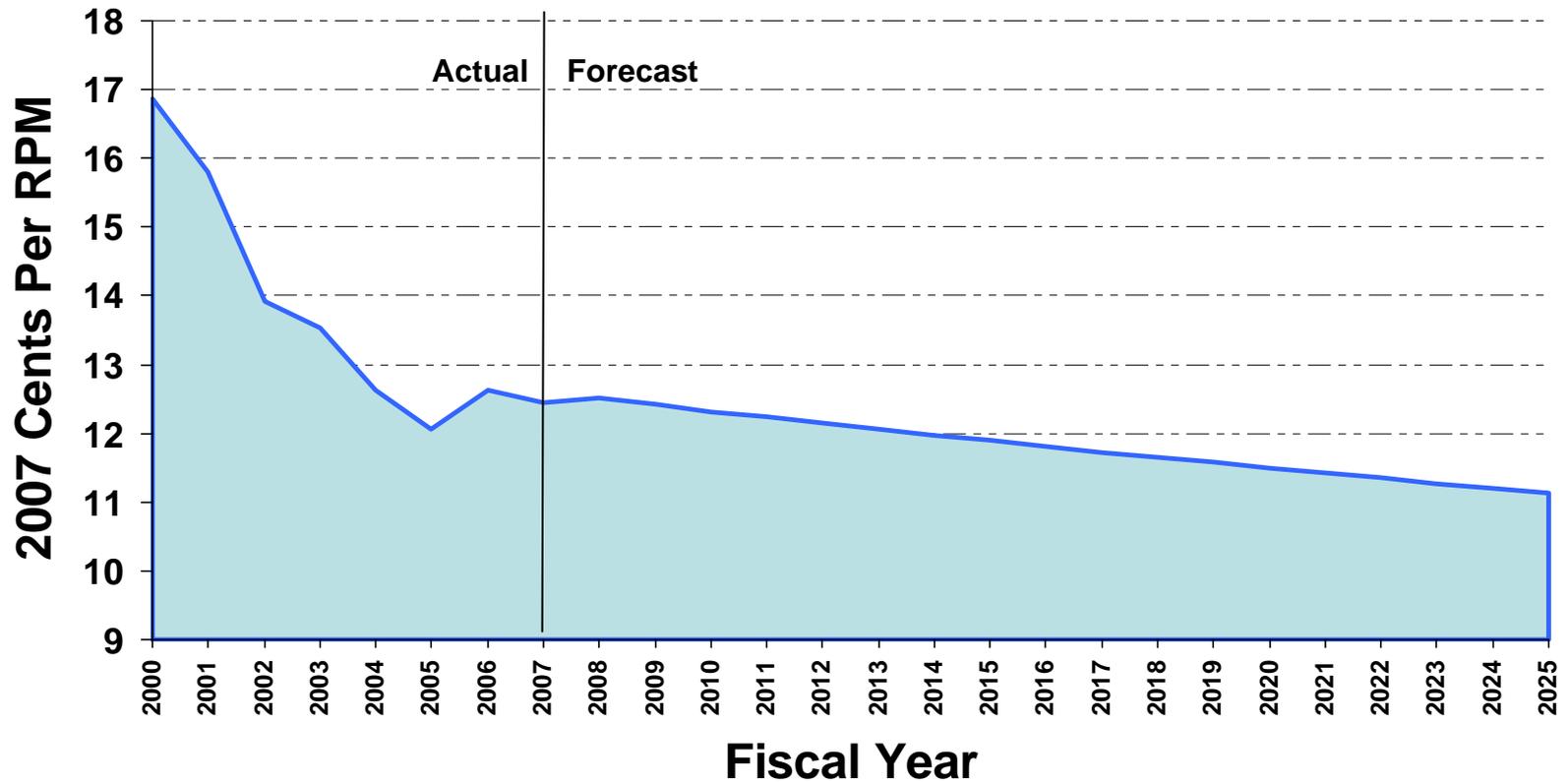
Oil Prices



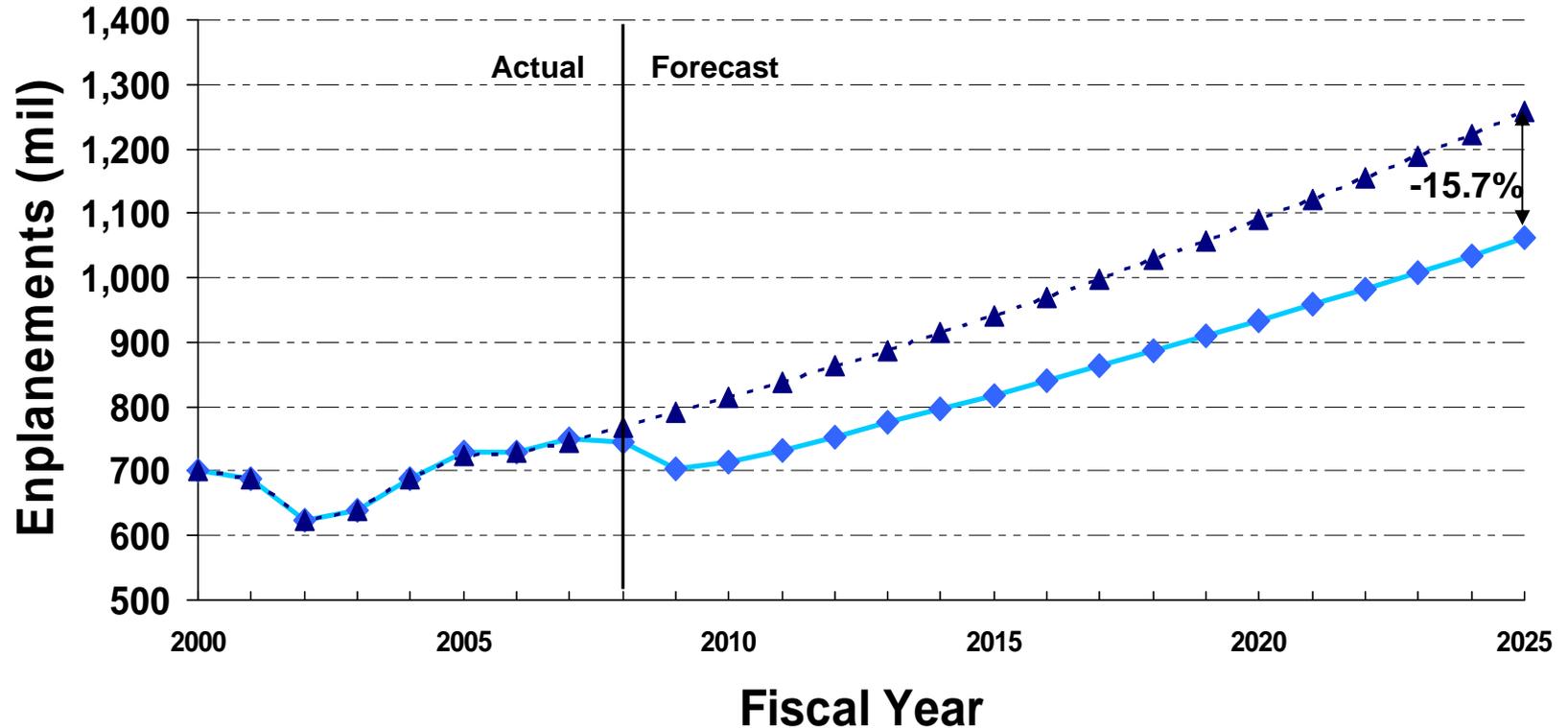
Domestic Yield – 2009 and beyond

- Carriers continue to exercise capacity discipline
 - Legacy/network carriers
 - 10% cut in 2009
 - New deliveries for replacement not growth
 - LCC's
 - 5% - 10% reduction in 2009
 - Deferrals of deliveries suggest growth limited till 2011
- Ancillary revenue will continue to rise
- Demand decline in 2009 may be so precipitous as to induce fare wars to stimulate demand

Domestic Real Yield



Enplanements at FAA & Contract Towers in the U.S.

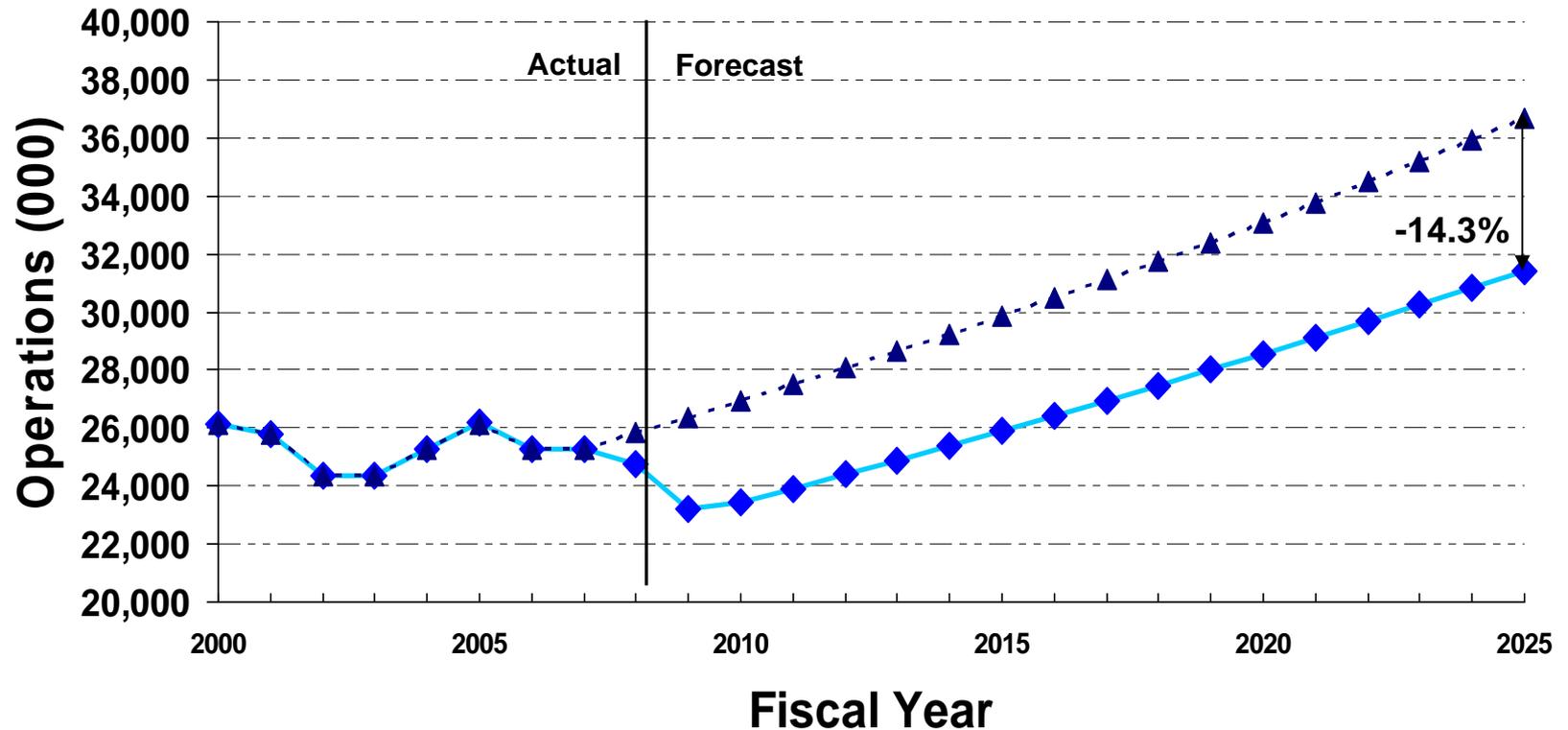


	TAF 2008	TAF 2007
2008-2009:	-5.5%	3.1%
2009-2025:	2.6%	2.9%

—◆— TAF 2008 - -▲- - TAF 2007



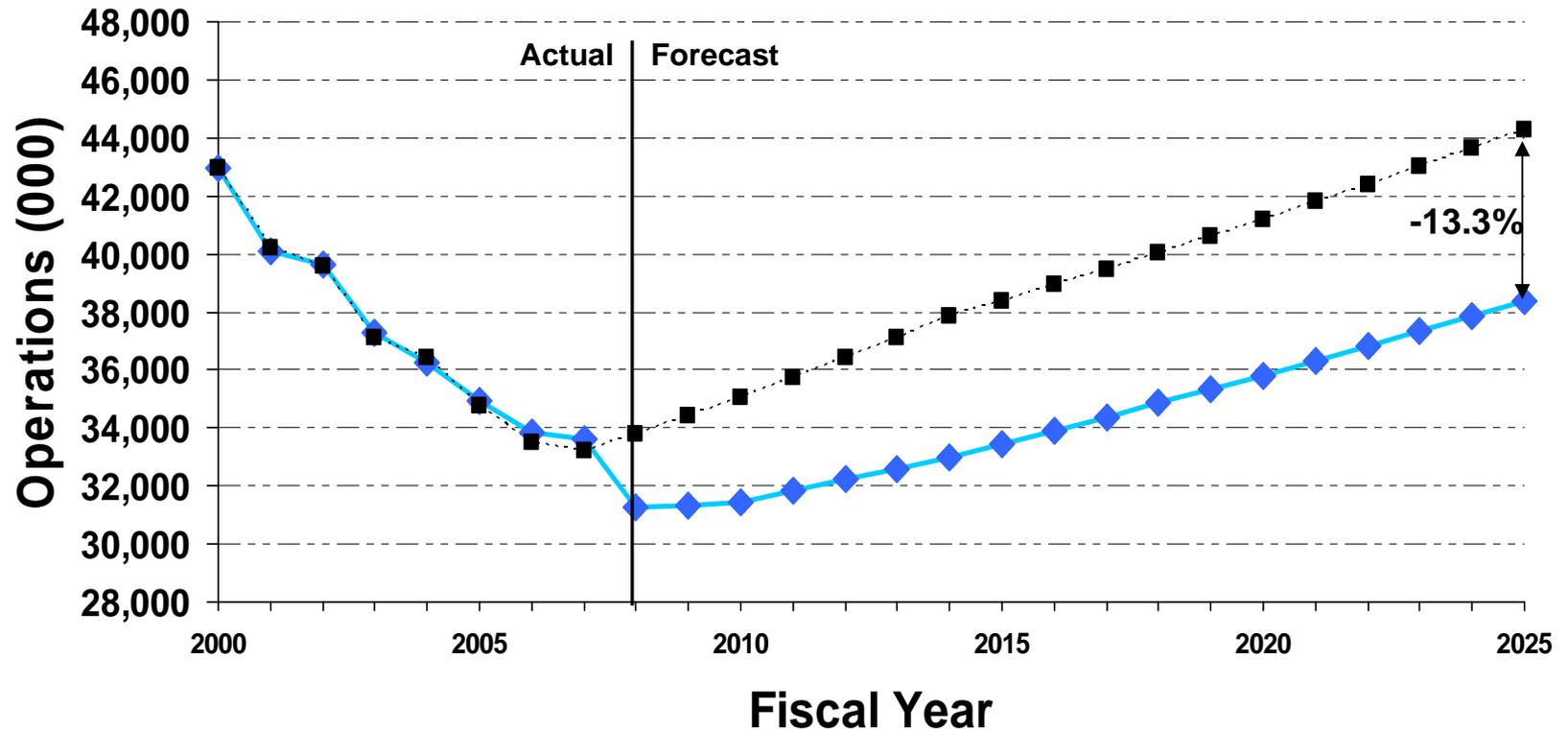
Commercial Ops at FAA & Contract Towers in the U.S.



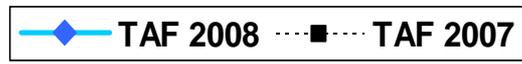
	TAF 2008	TAF 2007
2008-2009:	-6.1%	2.2%
2009-2025:	1.9%	2.1%



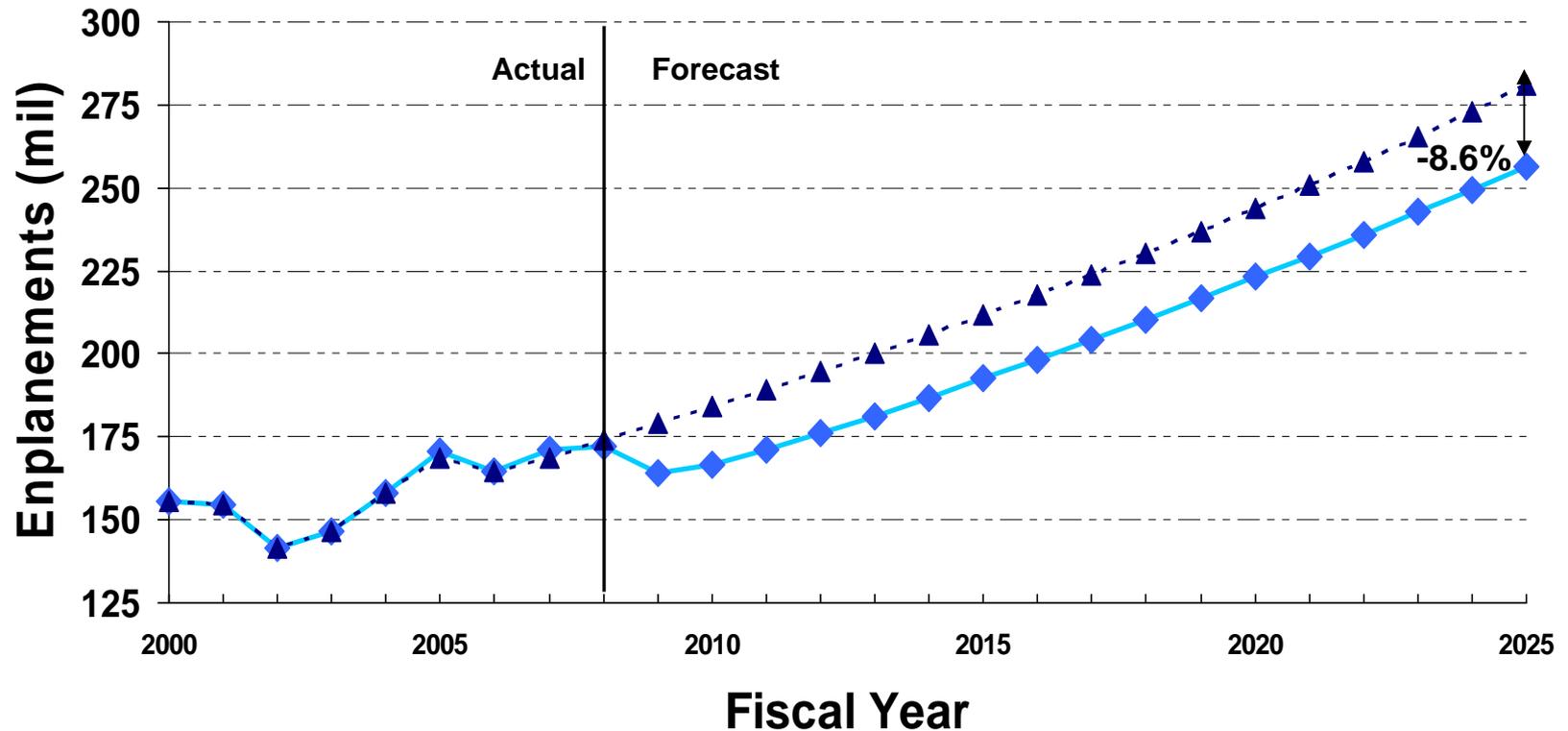
GA Ops at FAA & Contract Towers in the U.S.



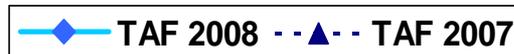
	TAF 2008	TAF 2007
2008-2009:	0.3%	1.9%
2009-2025:	1.3%	1.6%



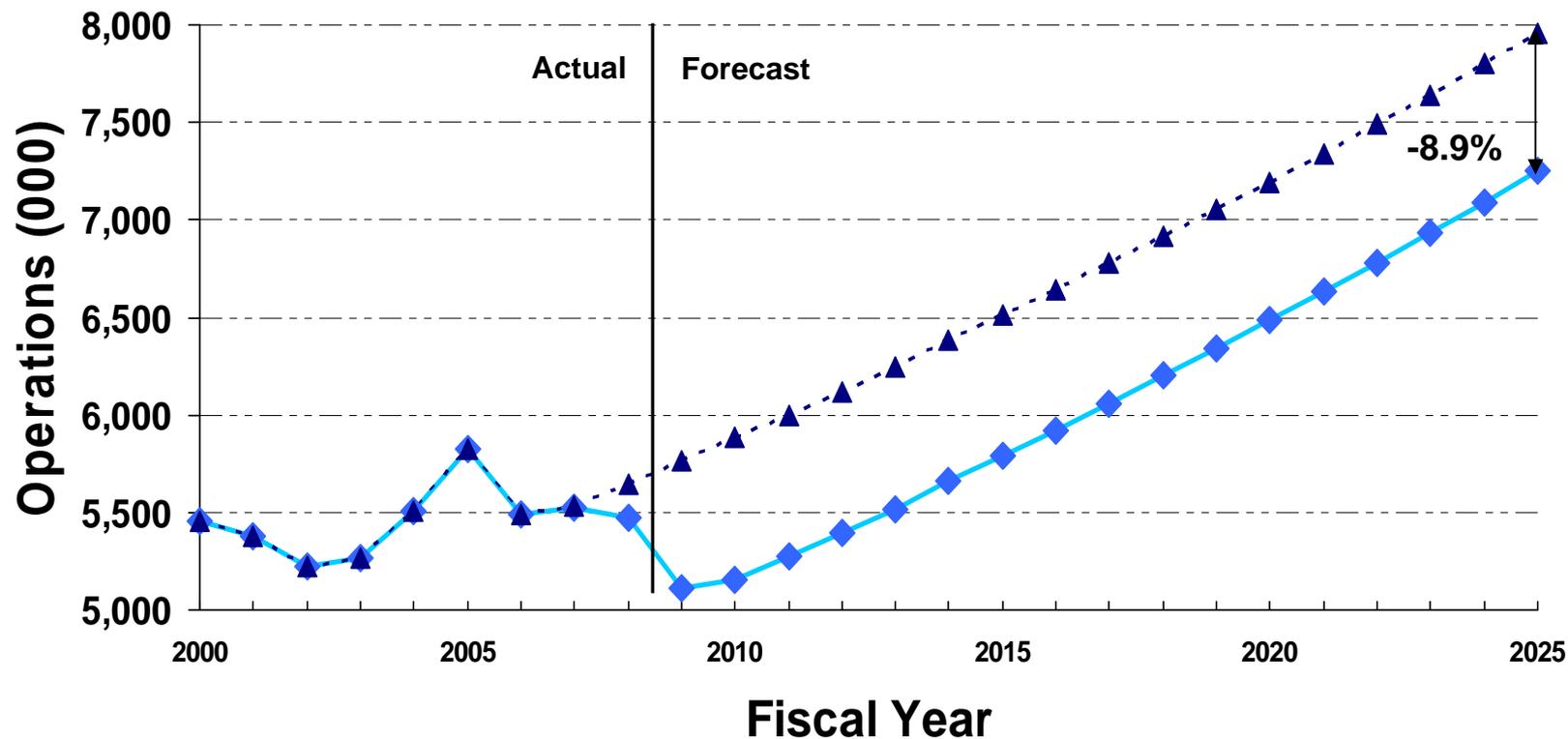
Enplanements at FAA & Contract Towers in the Southern Region



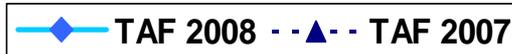
	TAF 2008	TAF 2007
2008-2009:	-4.8%	2.8%
2009-2025:	2.8%	2.8%



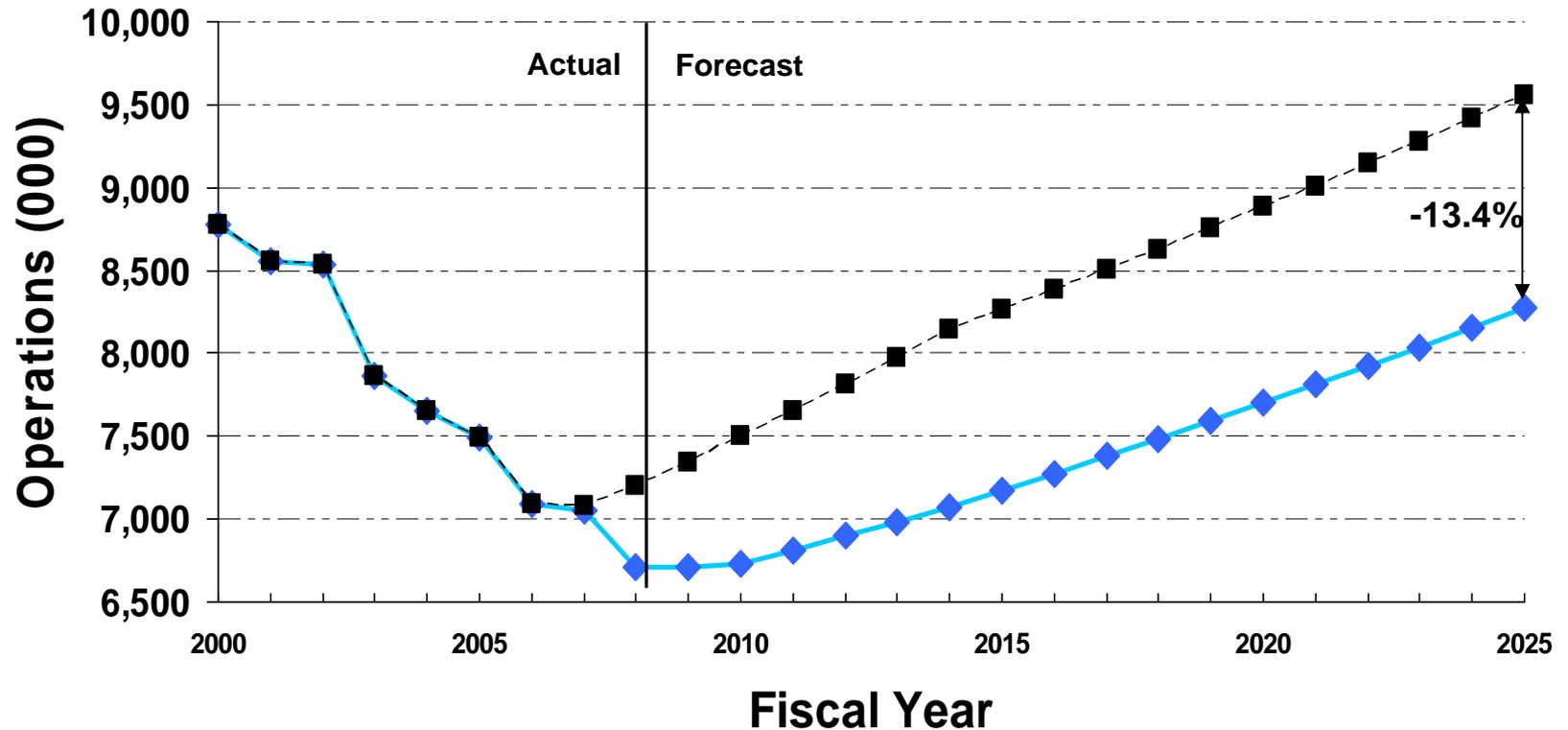
Commercial Ops at FAA & Contract Towers in the Southern Region



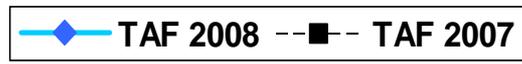
	TAF 2008	TAF 2007
2008-2009:	-6.6%	2.2%
2009-2025:	2.2%	2.0%



GA Ops at FAA & Contract Towers in the Southern Region

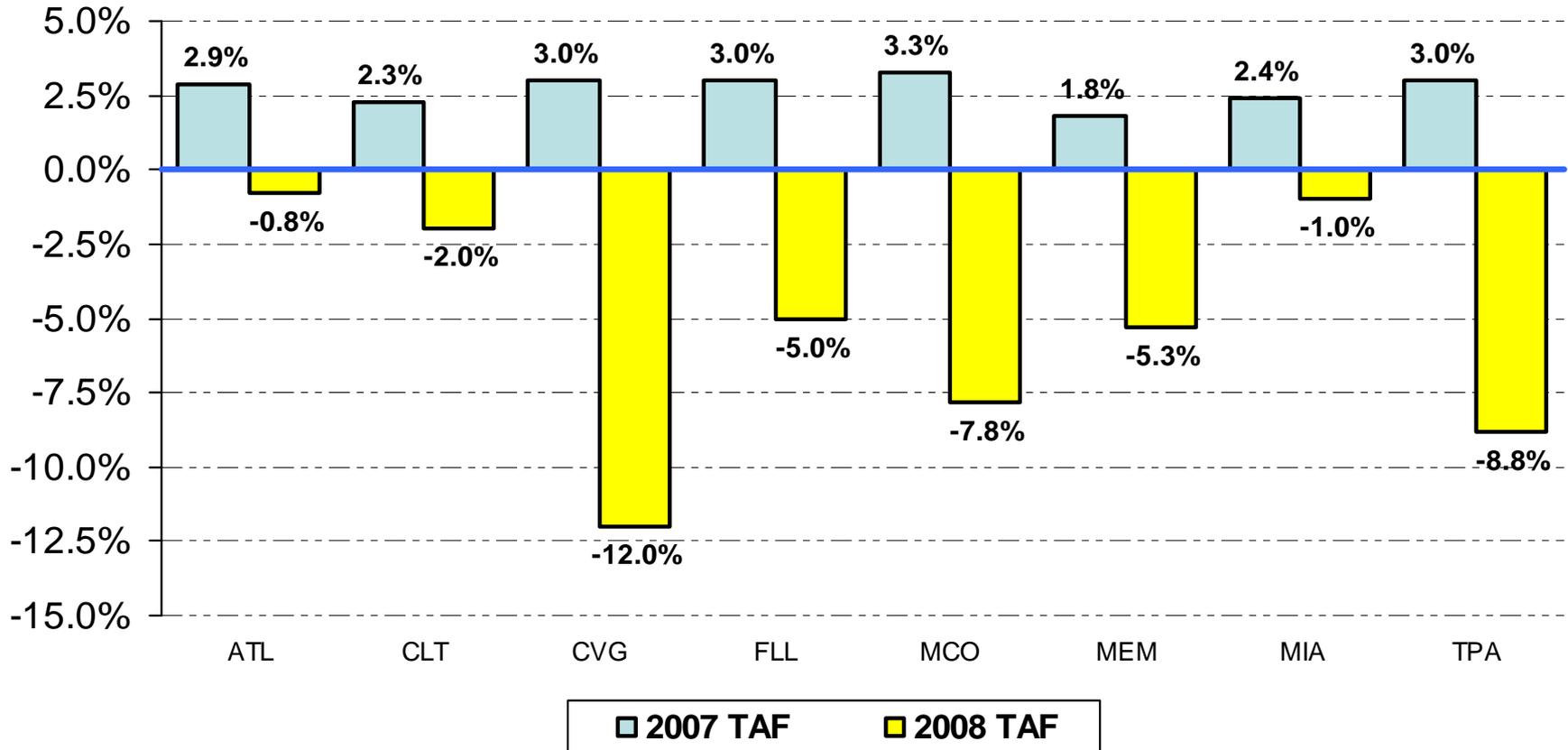


	TAF 2008	TAF 2007
2008-2009:	0.0%	2.0%
2009-2025:	1.3%	1.7%



2009 Forecast Growth in Enplanements at OEP Airports in the Southern Region

Yr.-to-Yr. change



Summary

- TAF is official FAA airport forecasts
- Stimulation factors for rapid recovery do not appear to be present
- Enplanements and operations forecasts in 2008 TAF lower than 2007 TAF

