

The Shape of Things to Come

Planning for General Aviation

Presentation to FAA Forecasting Conference
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Future Needs of General Aviation Airports

Agenda

- Private/Recreational Flying
- Business/Corporate Travel
- Very Light Jets
- Ancillary Support Facilities



What will these bring?



Private/Recreational Flying

Growth Outlook

- Barriers to Entry Remain High
- Updating/Maintaining Facilities
 - Hangar Redevelopment
 - FAA Safety Standards
- Accommodating Local Demand





Business/Corporate Travel

Growing Segment Near City Centers

- Airside Design Requirements
 - Runway Length
 - FAA Safety Standards
- Full-Service FBO
- Adequate Fueling Capacity
- Large Hangar Development





Very Light Jets

Embraer Phenom 100

High Growth Outlook (Cautiously Optimistic)

- Projected to outpace all other segments of the GA fleet
2006 – 2020: 6% annual growth (corp.) vs 0.4% annual growth (small GA)
- 4,000 – 5,000 units by 2017
 - 40% to replace turboprops
 - 20% to replace jets
 - 40% new business
- 7.8 million pax (0.72% of comm. market) by 2017
- About 60% of VLJs are expected to serve air taxi market



Cessna Mustang

Very Light Jets

Aircraft Description

- Cost: \$1 to \$3 million
- Seats: up to 6 – including crew
- Single pilot operation
- Weight: 10,000 lbs or less
- Approach speeds: 90 knots
- Airport reference code: A-I
- Range: 900 to 1750 NM
- Cruise speeds: 300+ Knots
- Flight levels: FL 150-280
- Runway length: 3,000 ft
- Extremely low noise emissions
- Advanced cockpit automation
- Composite airframe

<http://www.verylightjetmagazine.com>



Adams A700

Very Light Jets

Airfield Improvements

- Extreme cases more taxiways & runways
- Improved approaches, reduced minimums
 - Runway extensions and obstruction clearance for reduced visibility minimums
- Demand for full length parallel taxiways
- Improved lighting, markings and signage



HondaJet

Very Light Jets

FBO Improvements

- More staff to keep pace
- Additional terminal space – with visitor amenities
- Increased pilot services, expanded weather data
- Expanded aircraft maintenance capabilities
- Community hangar space
- Jet-A fuel storage



Diamond D-Jet

Very Light Jets

Landside Improvements

- Additional automobile parking
- Improved airport wayfinding signage
- More airport staff to maintain airport's greater usage
- Additional food/beverage, vending, retail
- Ground services – rental cars, taxi, car service, etc.



Eclipse 500

Very Light Jets

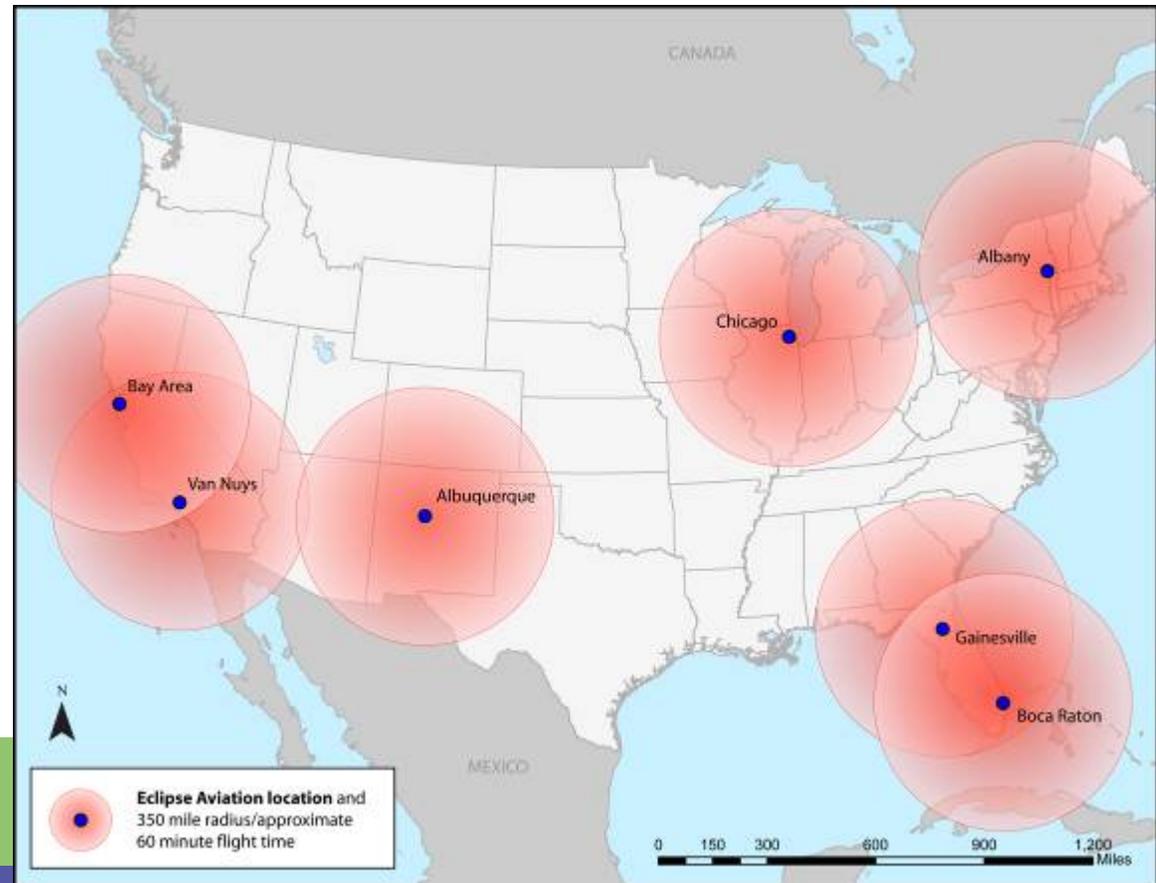
VLJ System Network

Secondary/Reliever
Airports:

Concentrated
along coasts

Surrounding Urban
Centers

Service Centers





Piper Jet

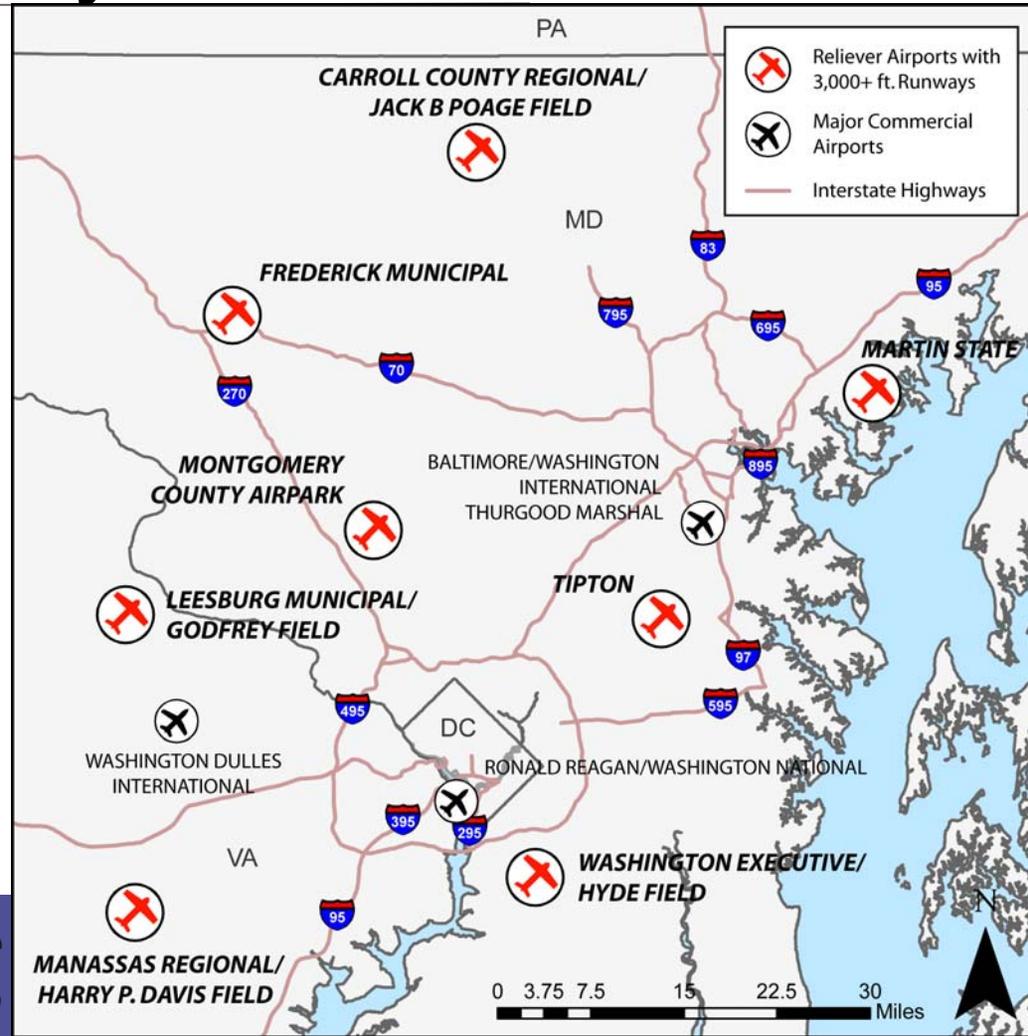
Very Light Jets

Regional/Statewide System Plans

States to identify key VLJ cities and regions

Relievers well positioned
High capacity general aviation airports in major metropolitan areas

Increase in controlled aircraft
Airspace/ATC constraints



Example: Within 30 NM of the Washington Tri-Area Terminal Area

Ancillary Support Facilities

Meeting Unique Needs

- Maintaining competitive advantage
 - T-hangar development (attract tenants)
 - Build-to-suit development (marketing)
- Filling a service niche
 - Self-service areas: fuel, wash rack, etc.
 - FBO expansion: facilities, hours, services
- Requirements by location or performance
 - Example: Consolidated Maintenance Facilities



The shape of GA is changing

- Antiquated facilities will be redeveloped/updated
- New facilities to accommodate a changing corporate fleet
- GA Airports will become more business oriented/competitive
- GA Airport will expand services and capabilities
- Growth businesses will look to GA for cost competitive options
- GA operations at commercial airports will lose market share

It's an exciting time!