



NANTUCKET MEMORIAL AIRPORT

Master Plan Working Group Meeting

Tuesday, February 25, 2014



JACOBS



MEETING AGENDA

February 25, 2014

1. **Welcome and Updates**, Tom Rafter, Airport Manager
2. **Revised Mission Statement—DRAFT**, Anne McKinnon, Jacobs
3. **Master Plan Elements—Review and Discussion**
 - ✓ Airfield Conditions – Bill Richardson, Jacobs
 - ✓ Environmental Overview – Meredith de Carbonnel, Jacobs
 - ✓ Airport Operations and Finances 101 – Steve Berardo, Jacobs
 - ✓ Aviation Activity – Steve Berardo, Jacobs
 - ✓ Forecasts of Aviation Demand – Steve Berardo, Jacobs
4. **Discussion – Working Group**
5. **Next Steps**





WORKING GROUP MEMBERS

- Tom Quigley
- Carol Dunton
- Diane Archer
- Leslie Johnson
- P.J. Martin Smith
- Sam Bailey
- Allen Reinhard
- Ernest Steinauer
- Andrew Vorce, AICP
- Arthur Gasbarro
- Tom Rafter
- Dave Sylvia
- Bob Egan
- Armando Cardenas
- Peter Farrell
- Surfside Association
- Resident
- Resident
- Resident
- Chamber of Commerce
- Airport Business
- Nantucket Civic League
- Massachusetts Audubon
- Town Planner
- Airport Commissioner
- Airport Manager
- Airport Compliance Officer
- Nantucket Flying Association
- Island Airlines
- Cape Air





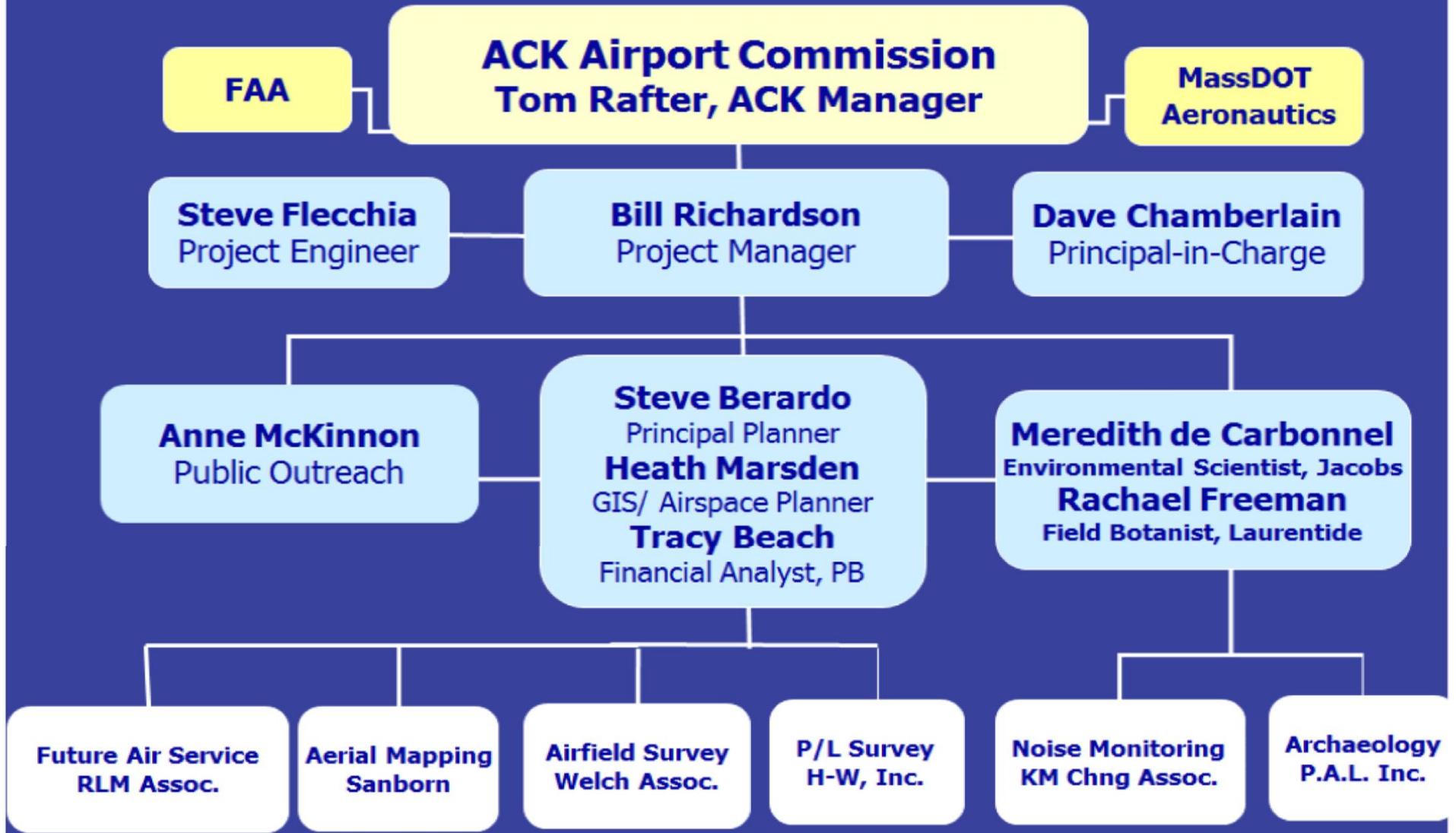
NANTUCKET AIRPORT DRAFT MISSION STATEMENT

“The mission of the Nantucket Memorial Airport (ACK) is to provide operationally safe, environmentally responsible, and economically sustainable air service to the residents, businesses, and visitors to the Island of Nantucket.”

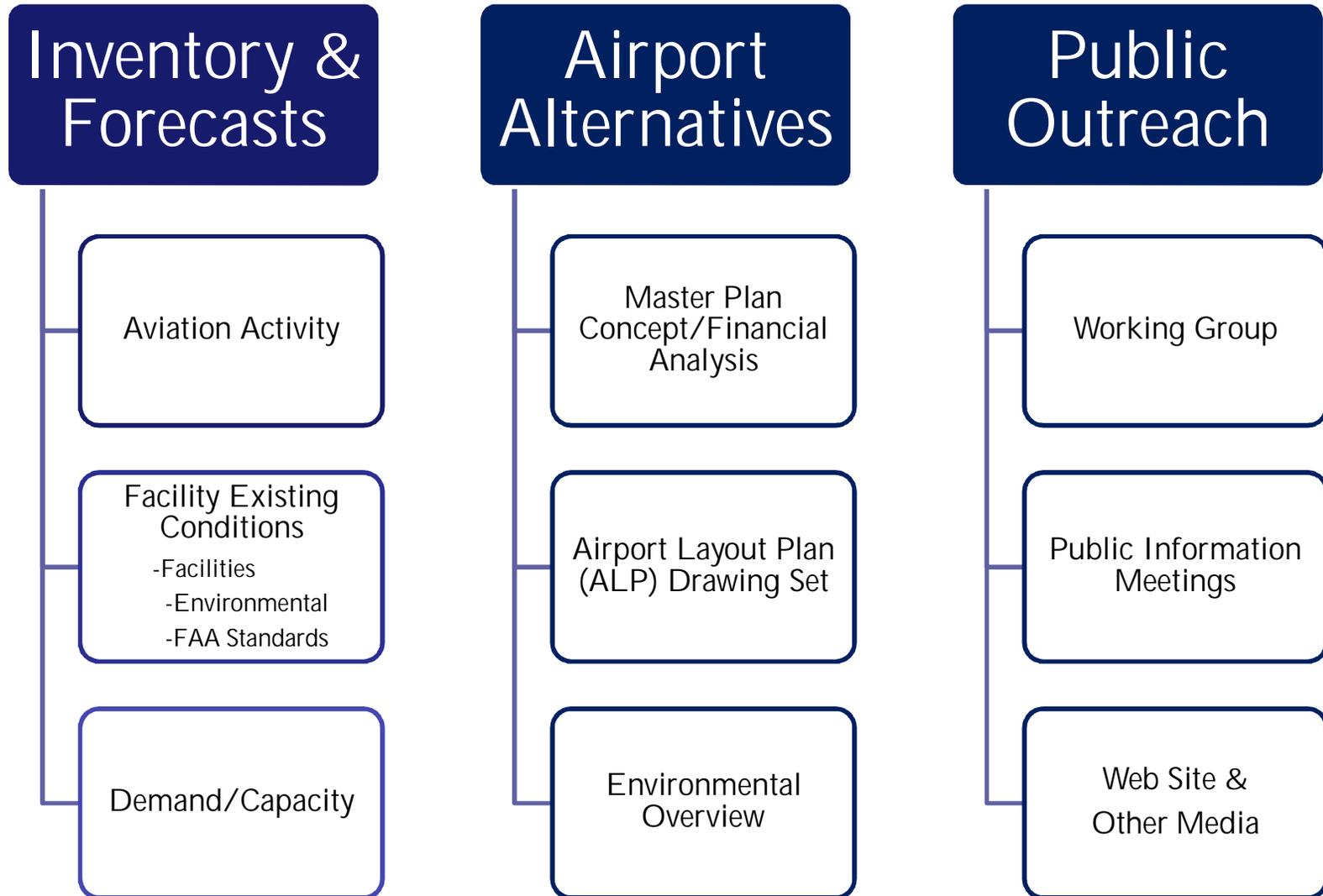


Master Plan Team

5



The Master Plan Process



ACK Master Plan Schedule

Phase/Task	Summer '13	Fall '13	Winter '13	Spring '14	Summer '14
Inventory/ GIS Mapping/ Air Service Trends		████████████████████			
Environmental Sustainability	██				
Forecasts/ Fleet Mix			████████		
Coastal Process Analysis	██████			████████████████	
Alt. Concepts Potential Impacts				████████████████	
Implementations Plan/ ALP					████████████
Financial Feasibility Plan					████████████████
Environmental Overview	████████████	████████████████	████████████████	████████████████	████████████████
Public Outreach		---*---	*-----	*-----	*



EXISTING CONDITIONS

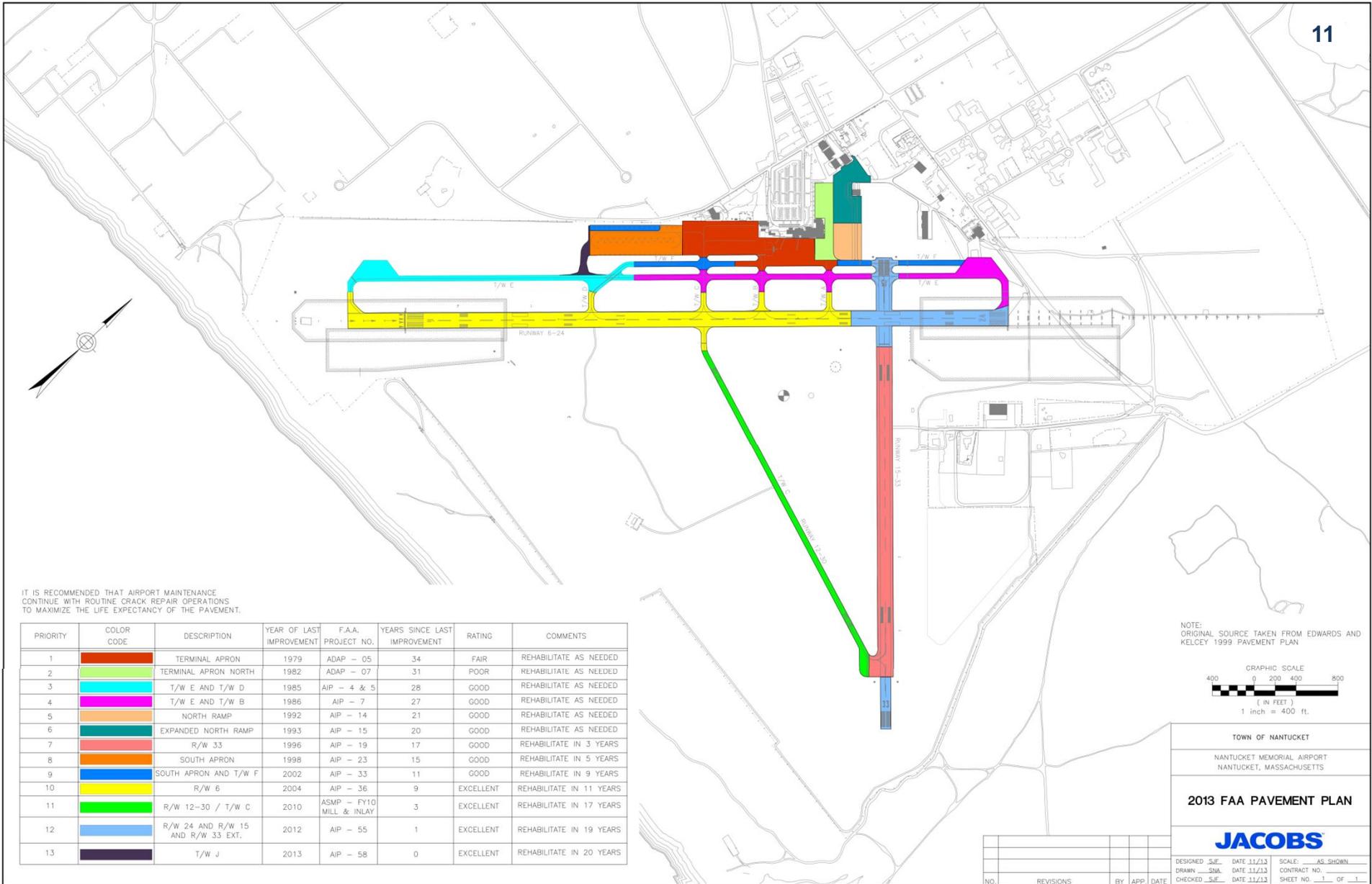


CRITICAL DESIGN AIRCRAFT

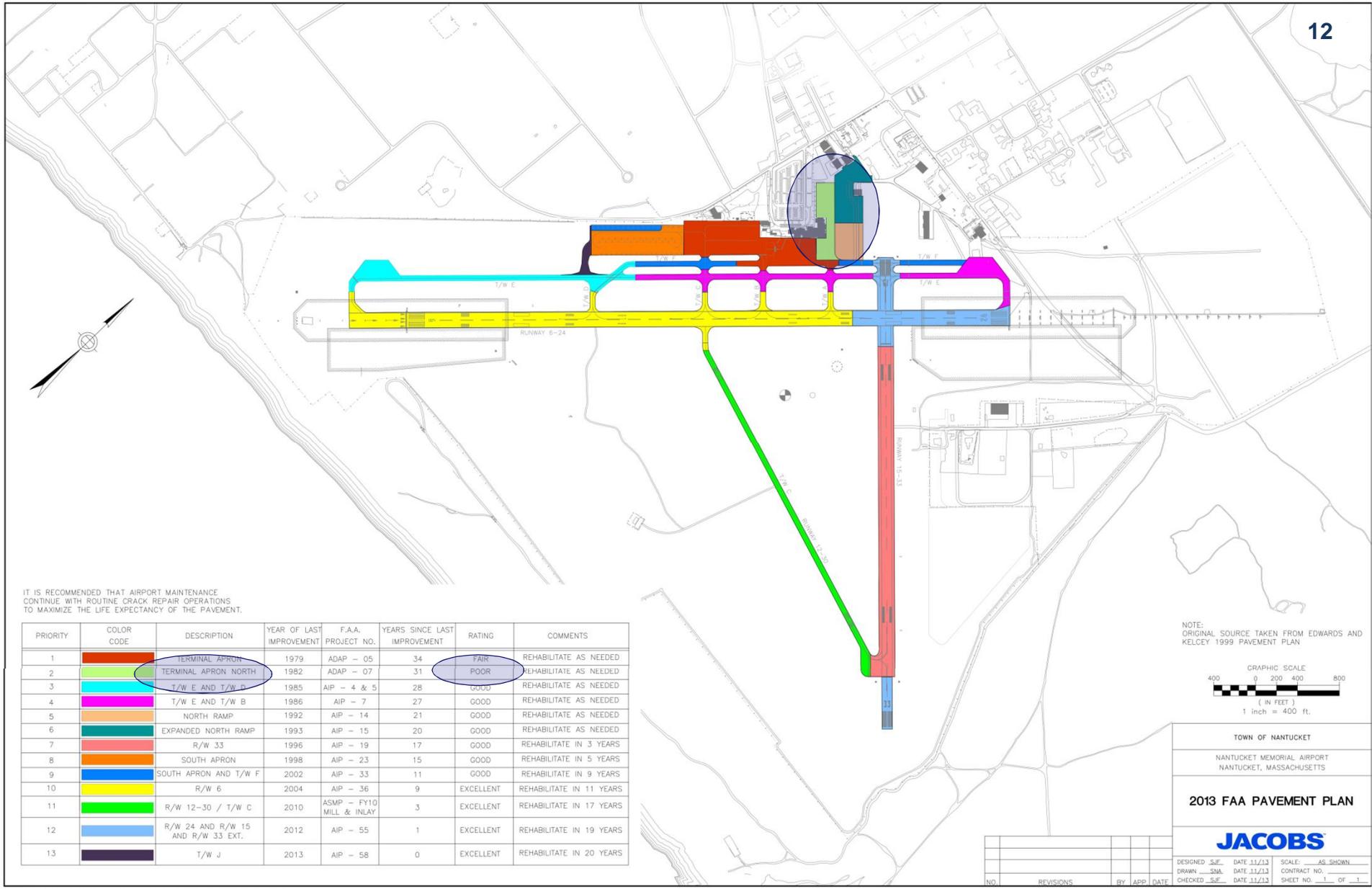
Runway 6-24 & Taxiways A, B, C, D, E, F, J	Runway 15-33	Runway 12-30
Gulfstream G-V	Beech King Air 90, Cessna 402, Piper Malibu	Beech Baron 58, Cessna 310, Piper Saratoga, etc.

GA Fleet Mix at ACK is Growing Larger





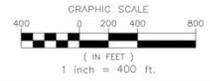
Nantucket Airport – Pavement Condition



IT IS RECOMMENDED THAT AIRPORT MAINTENANCE CONTINUE WITH ROUTINE CRACK REPAIR OPERATIONS TO MAXIMIZE THE LIFE EXPECTANCY OF THE PAVEMENT.

PRIORITY	COLOR CODE	DESCRIPTION	YEAR OF LAST IMPROVEMENT	F.A.A. PROJECT NO.	YEARS SINCE LAST IMPROVEMENT	RATING	COMMENTS
1	Red	TERMINAL APRON	1979	ADAP - 05	34	FAIR	REHABILITATE AS NEEDED
2	Green	TERMINAL APRON NORTH	1982	ADAP - 07	31	POOR	REHABILITATE AS NEEDED
3	Cyan	T/W E AND T/W D	1985	AIP - 4 & 5	28	GOOD	REHABILITATE AS NEEDED
4	Magenta	T/W E AND T/W B	1986	AIP - 7	27	GOOD	REHABILITATE AS NEEDED
5	Orange	NORTH RAMP	1992	AIP - 14	21	GOOD	REHABILITATE AS NEEDED
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7	Red	R/W 33	1996	AIP - 19	17	GOOD	REHABILITATE IN 3 YEARS
8	Orange	SOUTH APRON	1998	AIP - 23	15	GOOD	REHABILITATE IN 5 YEARS
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10	Yellow	R/W 6	2004	AIP - 36	9	EXCELLENT	REHABILITATE IN 11 YEARS
11	Green	R/W 12-30 / T/W C	2010	ASMP - FY10 MILL & INLAY	3	EXCELLENT	REHABILITATE IN 17 YEARS
12	Blue	R/W 24 AND R/W 15 AND R/W 33 EXT.	2012	AIP - 55	1	EXCELLENT	REHABILITATE IN 19 YEARS
13	Purple	T/W J	2013	AIP - 58	0	EXCELLENT	REHABILITATE IN 20 YEARS

NOTE: ORIGINAL SOURCE TAKEN FROM EDWARDS AND KELCEY 1999 PAVEMENT PLAN



TOWN OF NANTUCKET
 NANTUCKET MEMORIAL AIRPORT
 NANTUCKET, MASSACHUSETTS

2013 FAA PAVEMENT PLAN

JACOBS

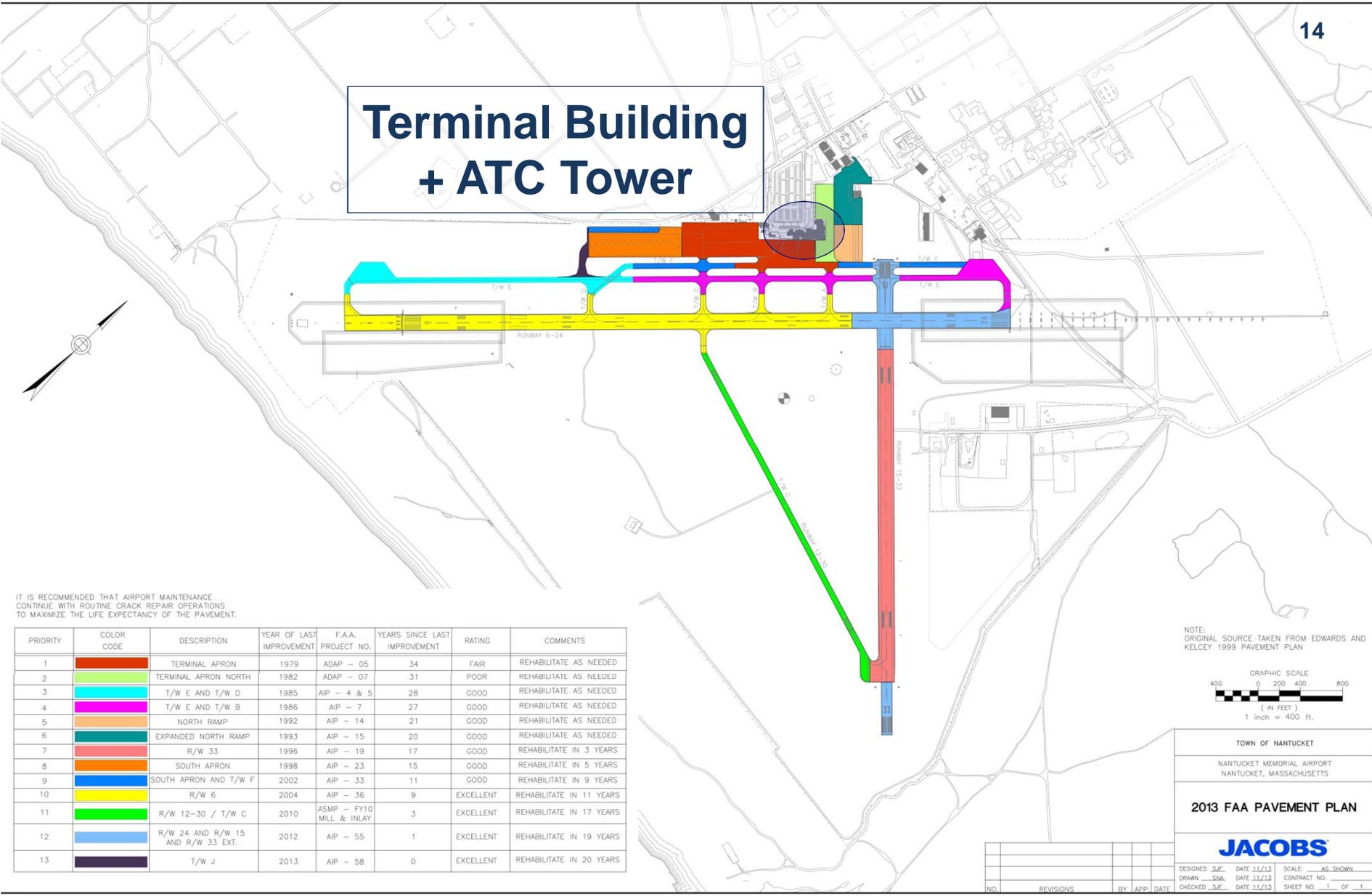
DESIGNED S.J.F. DATE 11/13 SCALE: AS SHOWN
 DRAWN S.M.A. DATE 11/13 CONTRACT NO.
 CHECKED S.J.F. DATE 11/13 SHEET NO. 1 OF 1

Terminal Apron Pavement – Fair to Poor

Minimum Space on North Apron



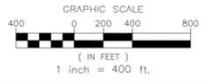
Terminal Building + ATC Tower



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2013 FAA PAVEMENT PLAN



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NO.	REVISIONS	BY	APP	DATE

Terminal Building – Hold Rooms & Security



BOST/PROV

JETBLUE

SEENING



GATES
2 & 3

EXIT







ADVICE TO PASSENGERS

BAGGAGE IDENTIFICATION
All checked baggage is required to have outside identification.

PASSENGER CONTROL OF BAGGAGE AND FIREARMS IN CHECKED BAGGAGE
Passengers with checked baggage must present valid travel authorization and permit inspection of their checked baggage.

Passengers must not accept items from unknown individuals and must control their baggage to prevent the introduction of dangerous items without their knowledge.

Loaded firearms and unauthorized explosives or incendiary devices are prohibited in checked baggage at all times. Federal regulations require passengers to declare firearms in checked baggage. Each firearm must be unloaded and carried in a locked, hard-sided container to which only the passenger

SAMSUNG LIABILITY
The carrier is not responsible for damage to or loss of property, including baggage, carried on its aircraft. The carrier's liability is limited to the actual value of the property at the time of the loss or damage. The carrier's liability is limited to the actual value of the property at the time of the loss or damage.

SECURITY NOTICE
Keep all baggage and personal items with you at all times. Do not transport items given to you by unknown persons. All checked and carry-on baggage is subject to inspection.

checking the baggage retains the key or combination. Passengers failing to declare firearms or transporting loaded firearms are subject to substantial civil and criminal penalties.

HAZARDOUS MATERIALS NOTICE
Federal law forbids the carriage of hazardous materials aboard aircraft in your luggage or on your person. A violation can result in five years imprisonment and a fine of \$250,000 or more (49 U.S.C. 1762). Hazardous materials include explosives, compressed gases, flammable liquids and solids, toxic substances, infectious substances, radioactive materials, and other hazardous materials. Examples: paints, lighter fluid, fireworks, tear gases, aerosol deodorants, and other aerosols. There are special exceptions for some pharmaceuticals (up to 72 ounces total) and certain medical supplies. For further information contact your airline representative.

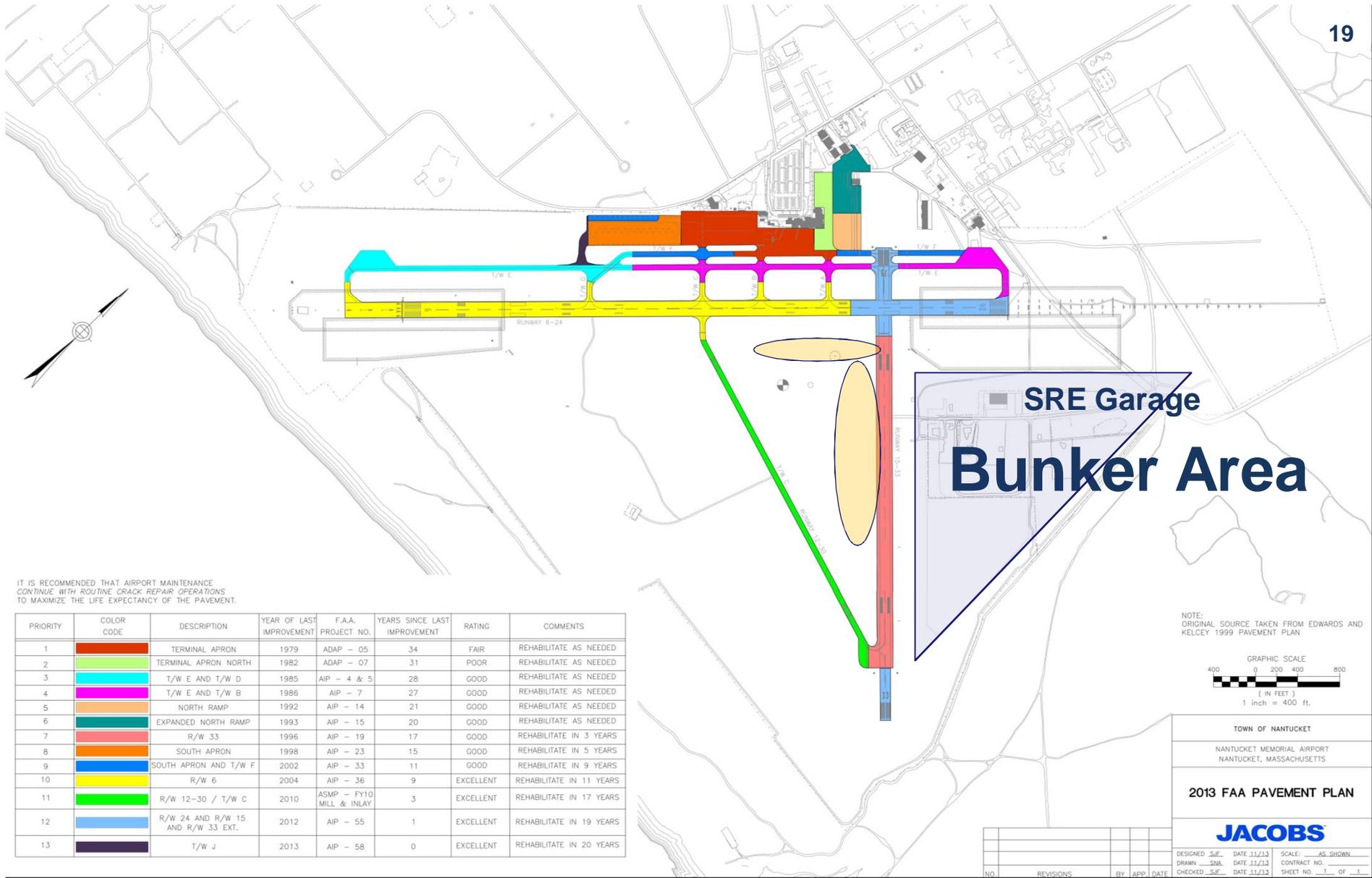
CHECKING OF PASSENGER BAGGAGE
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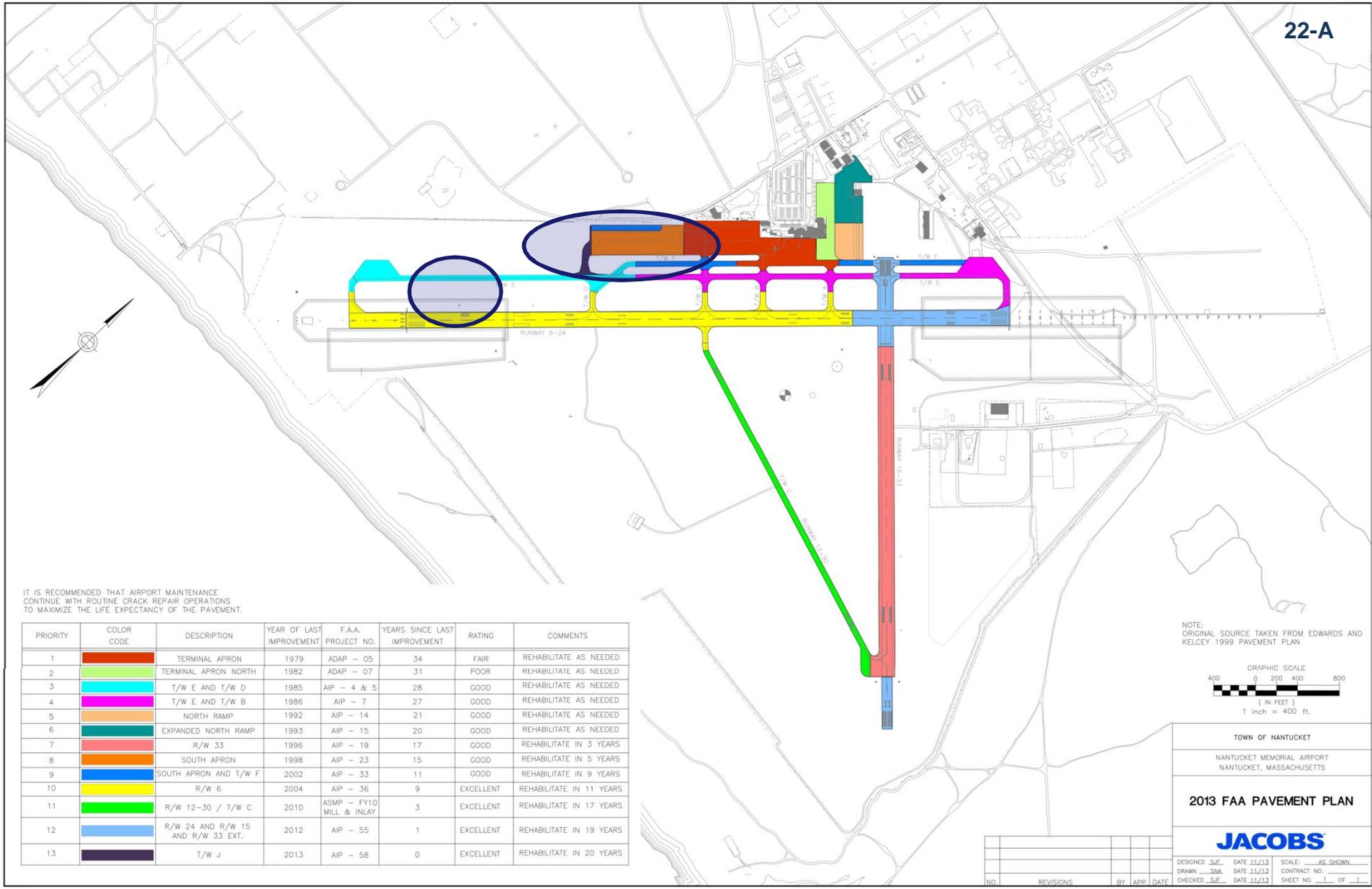
Runway 33 Exit Taxiways + Bunker Area Development



Runway 33 + Bunker Area



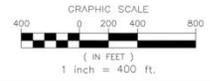
Runway 33 Connector Taxiways



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NO.	REVISIONS	BY	APP.	DATE

South Apron and Runway 24 Exit

South Apron Parking as Designed



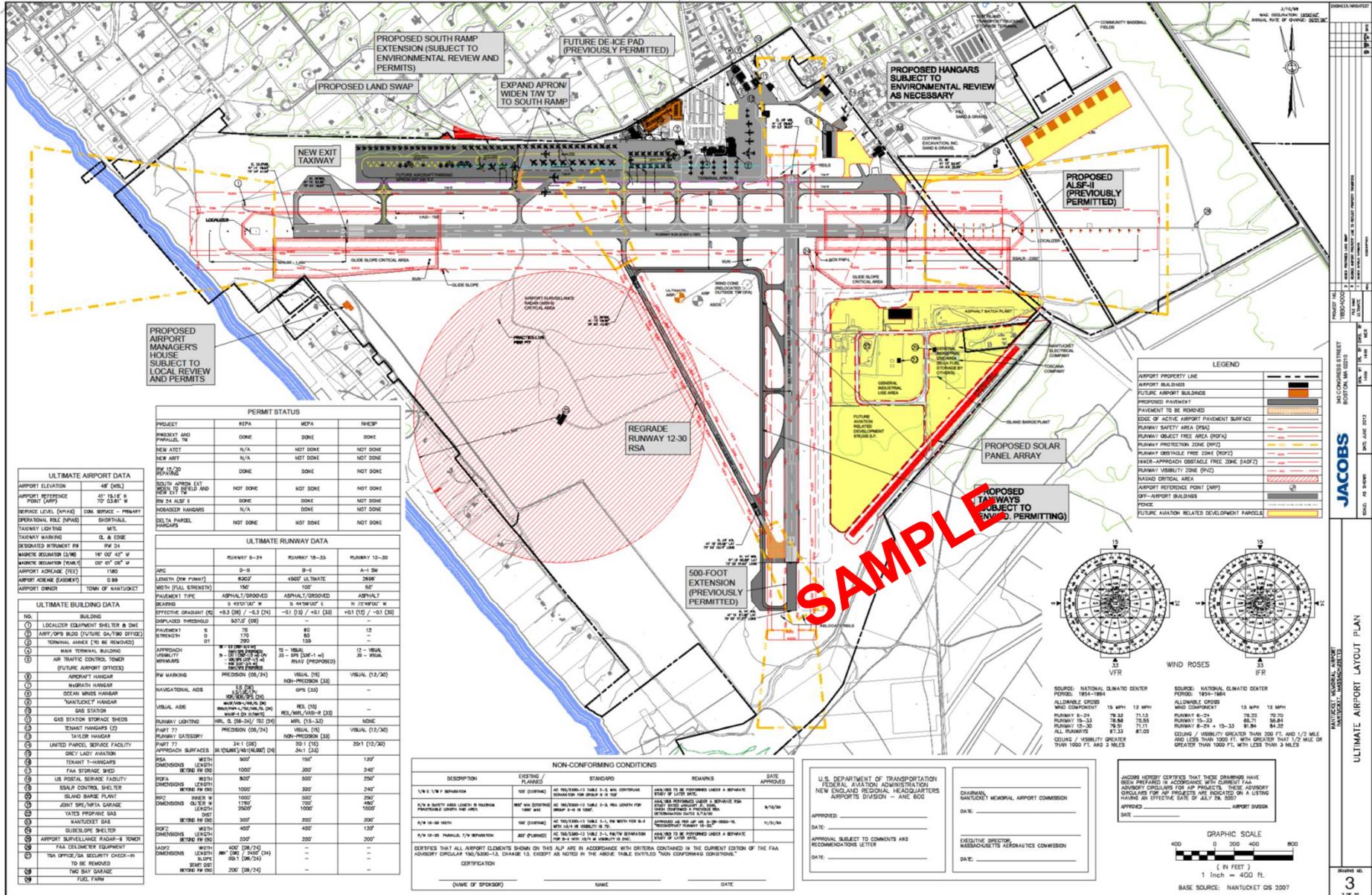
South Apron Parking as Currently Used



Tight Taxi Clearances on the South Apron



Airport Layout Plan (ALP)



Questions and Discussion



ENVIRONMENTAL CONDITIONS

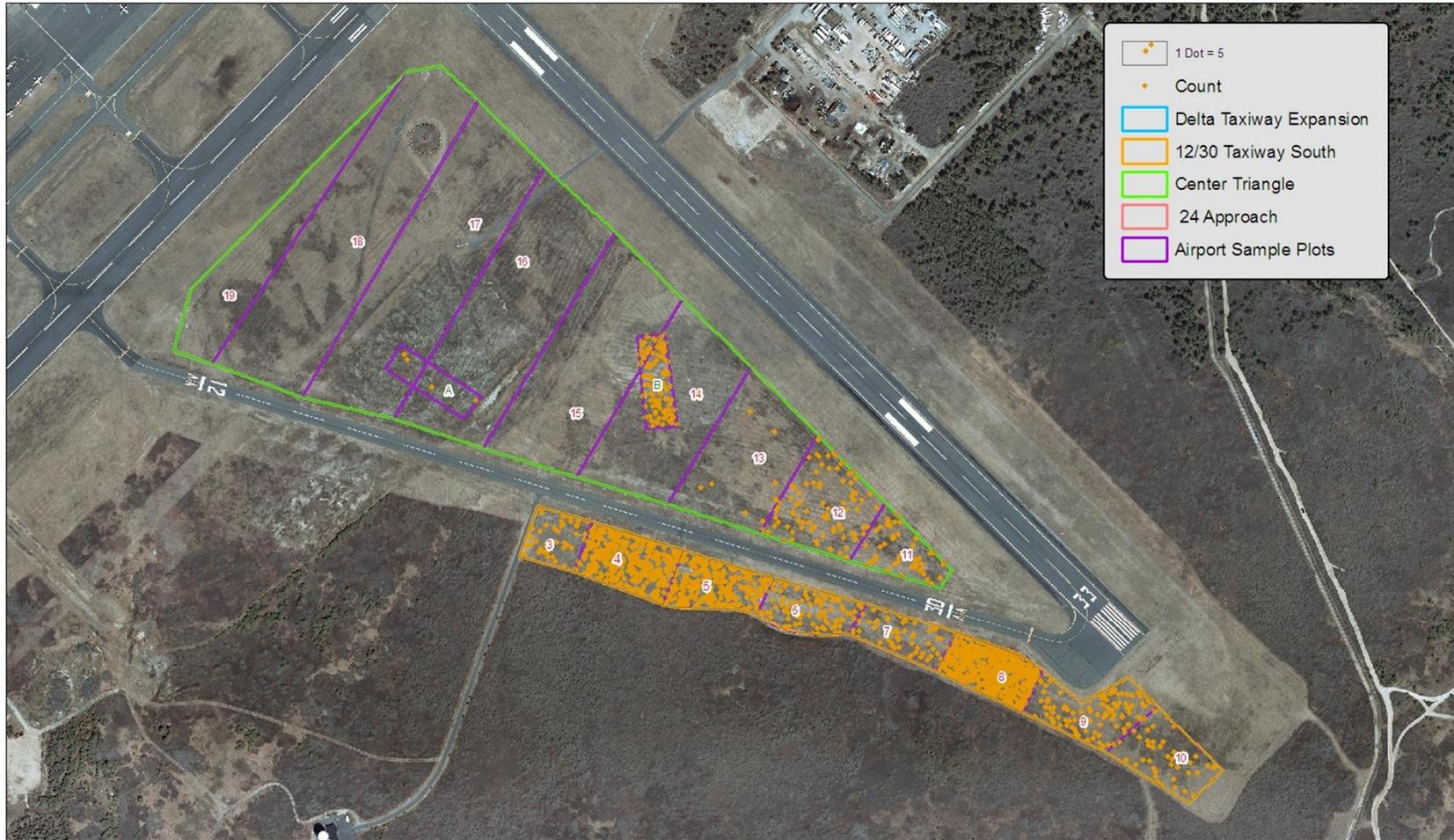


Endangered Species

- Surveys were conducted to identify areas of environmental sensitivity
- 2013 Surveys show population growth and large numbers of individual plants indicating management techniques are working well
- Surveys also help identify areas where habitat enhancement can occur to mitigate for future impacts or habitat encroachment.



Sample Plots 2013 Survey Sandplain Blue Eyed Grass at “triangle”



Nantucket Memorial Airport
12/30 Taxiway South and Center Triangle Areas
2013 Sisyrrinchium Numbers

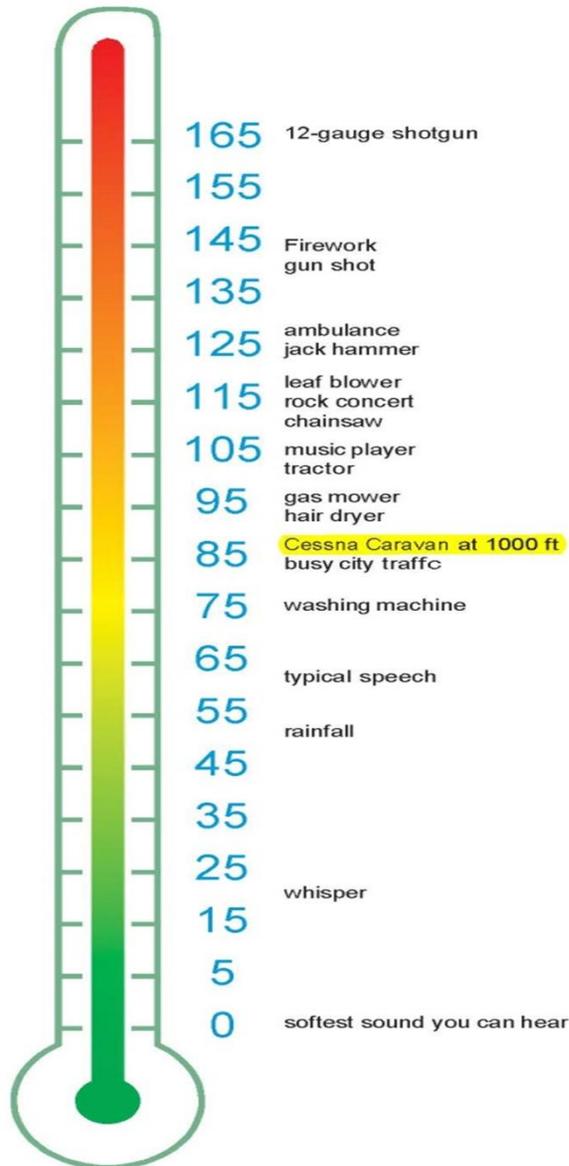


Coastal Resources

Historic High Water Shorelines



ACK Noise Study



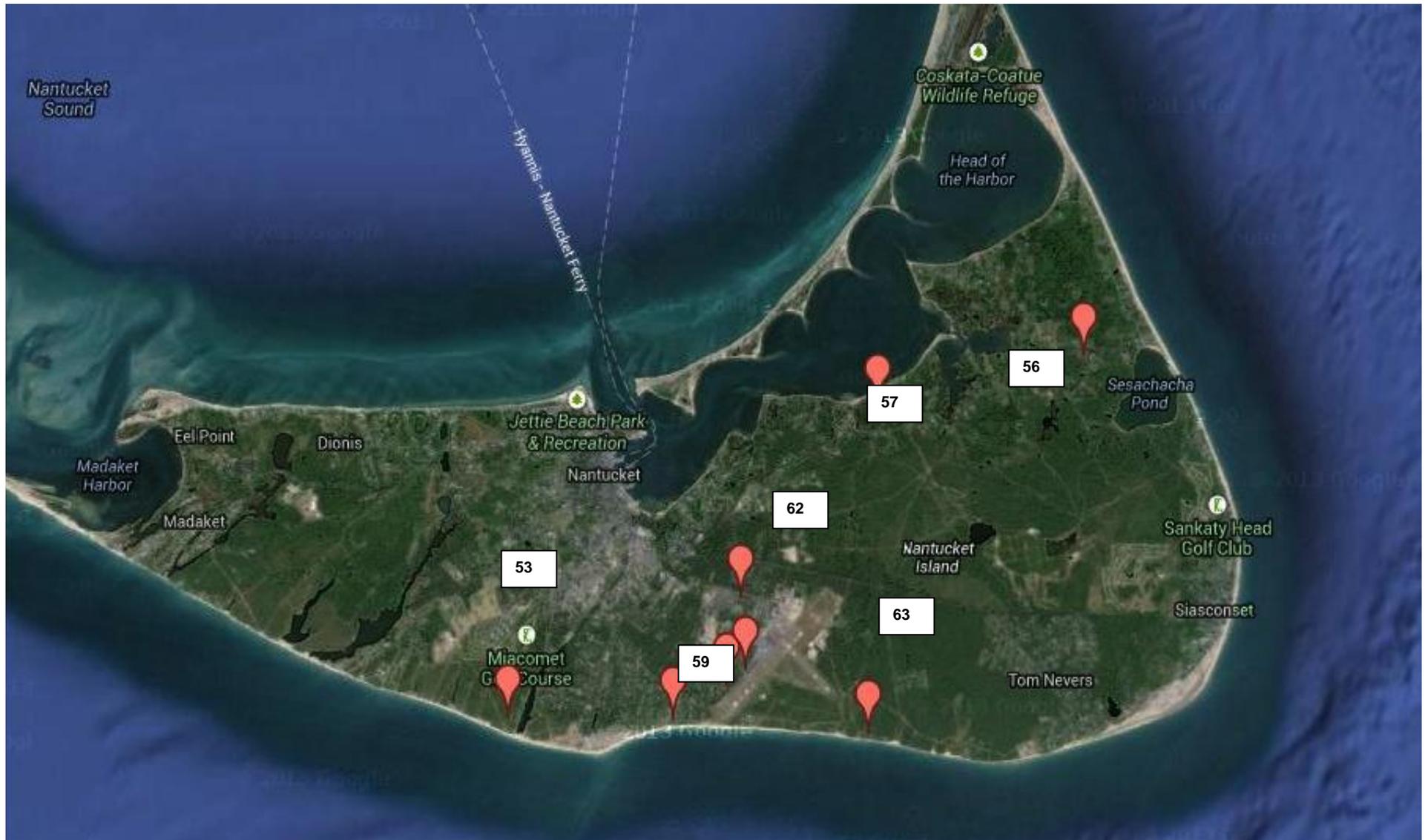
The Measured five-day August average for air operations at six residential locations varied from approximately 51-58 dBA

Maximum levels for these locations reached between 73 and 84 dBA

Ground operations measured in 2011, 2012, 2013. Noise levels in 2013 similar but for less time - attributable to the new voluntary APU restrictions

Noise Study - Monitoring Locations

Average Day-Night Noise Levels



Sustainability Baseline

- Sustainability practices will be carried into Master Plan decision making processes for both design and operations considerations
- Many practices already in place such as geothermal heating and cooling, and car recharging stations.
- ACK was recently selected to become nation's first Carbon Neutral Airport.
- ESCO partnering is underway to help achieve better energy efficiency in facility operations.



Questions and Discussion



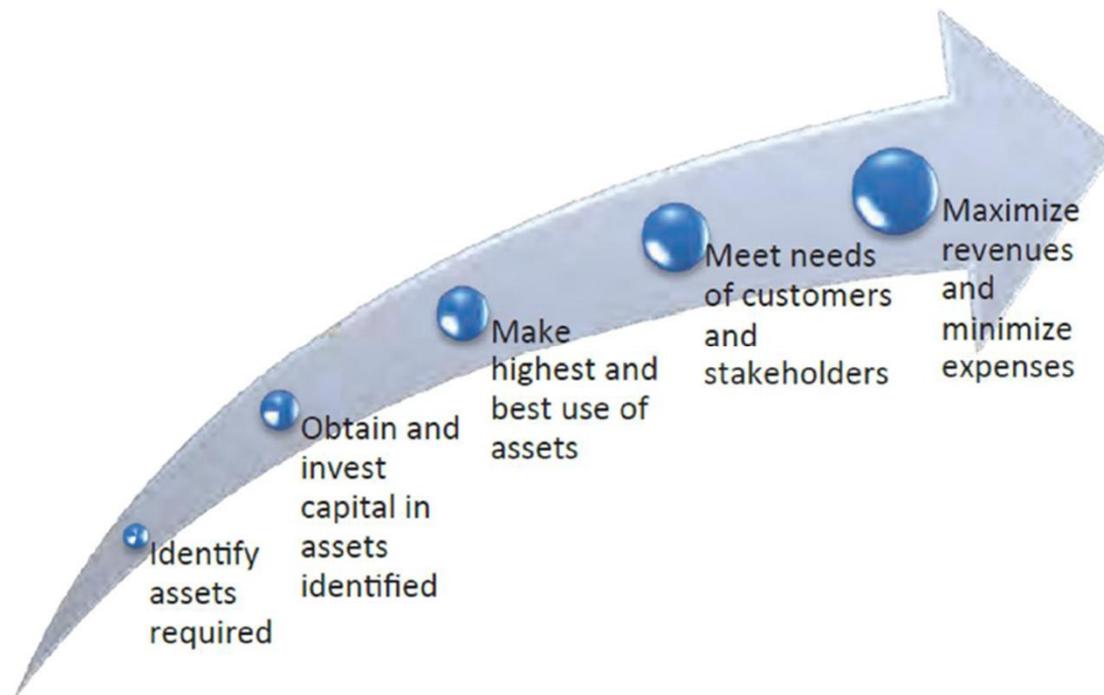
Airport Operations and Finances 101



Operating Nantucket Airport

37

- **Maintain and operate physical facilities**
- **Financial management - budgeting**
- **Environmental stewardship**
- **Promote the airport and the Town**
- **Comply with federal, state, local regulations**



Operating Nantucket Airport - *A Partnership* -

- **Federal Aviation Administration**
 - ✓ Air Traffic Control
 - ✓ Navigation Aids
 - ✓ Airport Operations & Maintenance Oversight
 - ✓ Instrument Approaches
- **Transportation Security Administration**
- **MassDOT**
- **Airlines**
- **Airport Tenants**
- **Town**





FAA
Airports



Grant Assurances Airport Sponsors

14 CFR Part 139 - Certification of Airports

49 CFR Part 1542 - Airport Security

Operating Nantucket Airport Federal Obligations

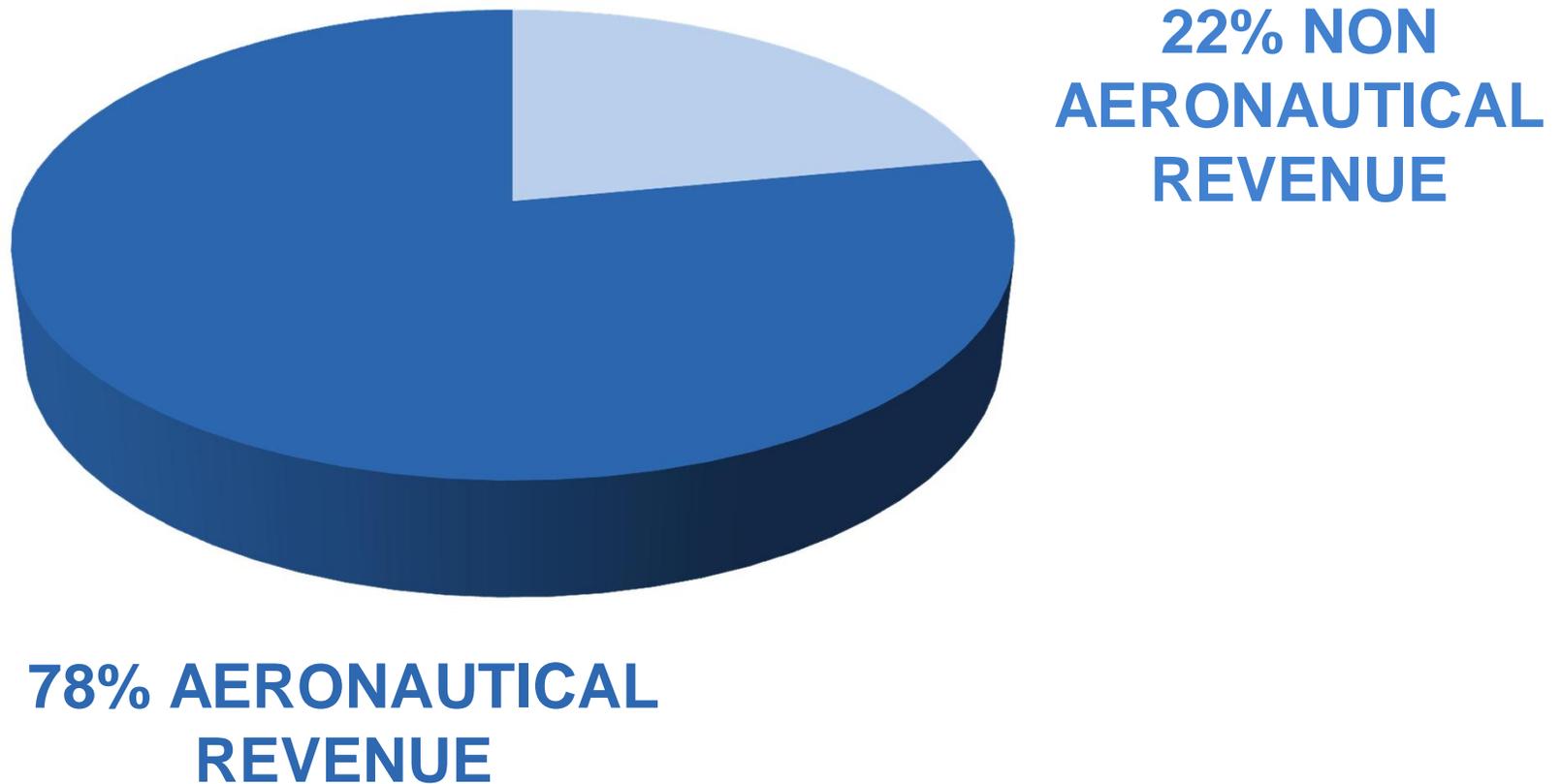
- **Airport Revenue Dedicated to the Airport**
- **Maintain Airspace Clear of Obstructions**
- **Promote Compatible Land Use**
- **Airport Should be Financially Self Sufficient**
- **Rates and Charges Must Be Fair & Reasonable**
- **Cannot Limit Access By Category or Class of User**
- **Cannot Impose Curfew**
- **Assurances in Effect for 20 Years After Last Grant**



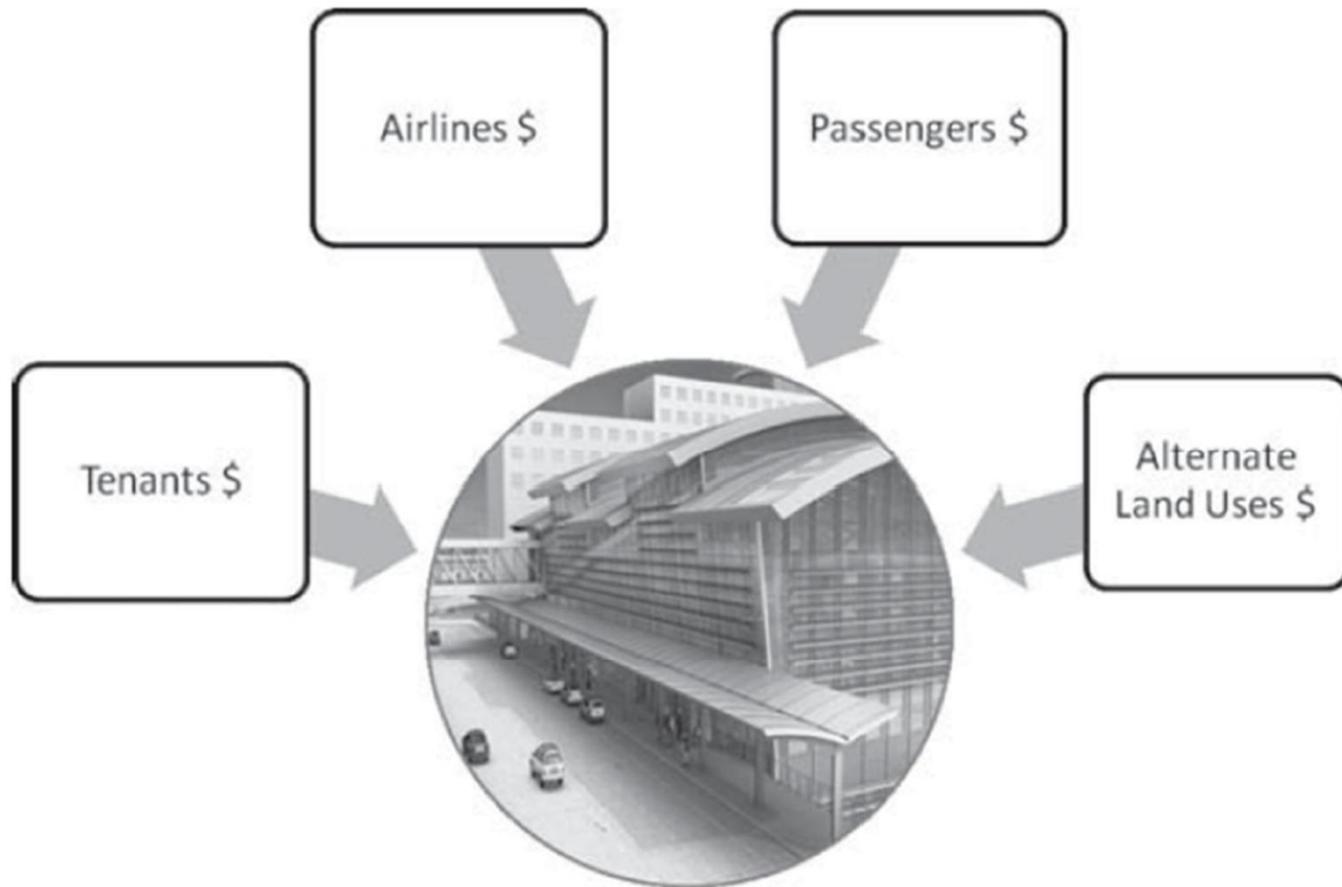
Nantucket Airport as a Business



Nantucket Airport Revenue Sources

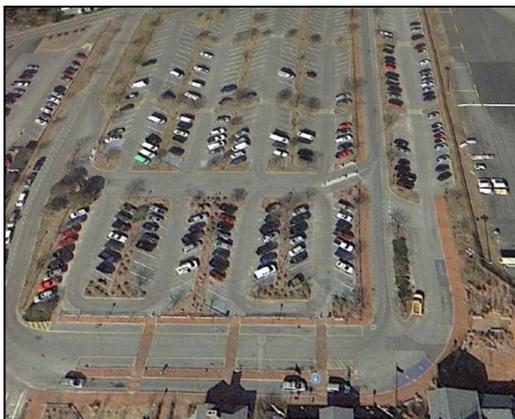


Operating Nantucket Airport Users Pay



Operating Nantucket Airport

Users Pay





Nantucket Airport is also the Fixed Base Operator (FBO)

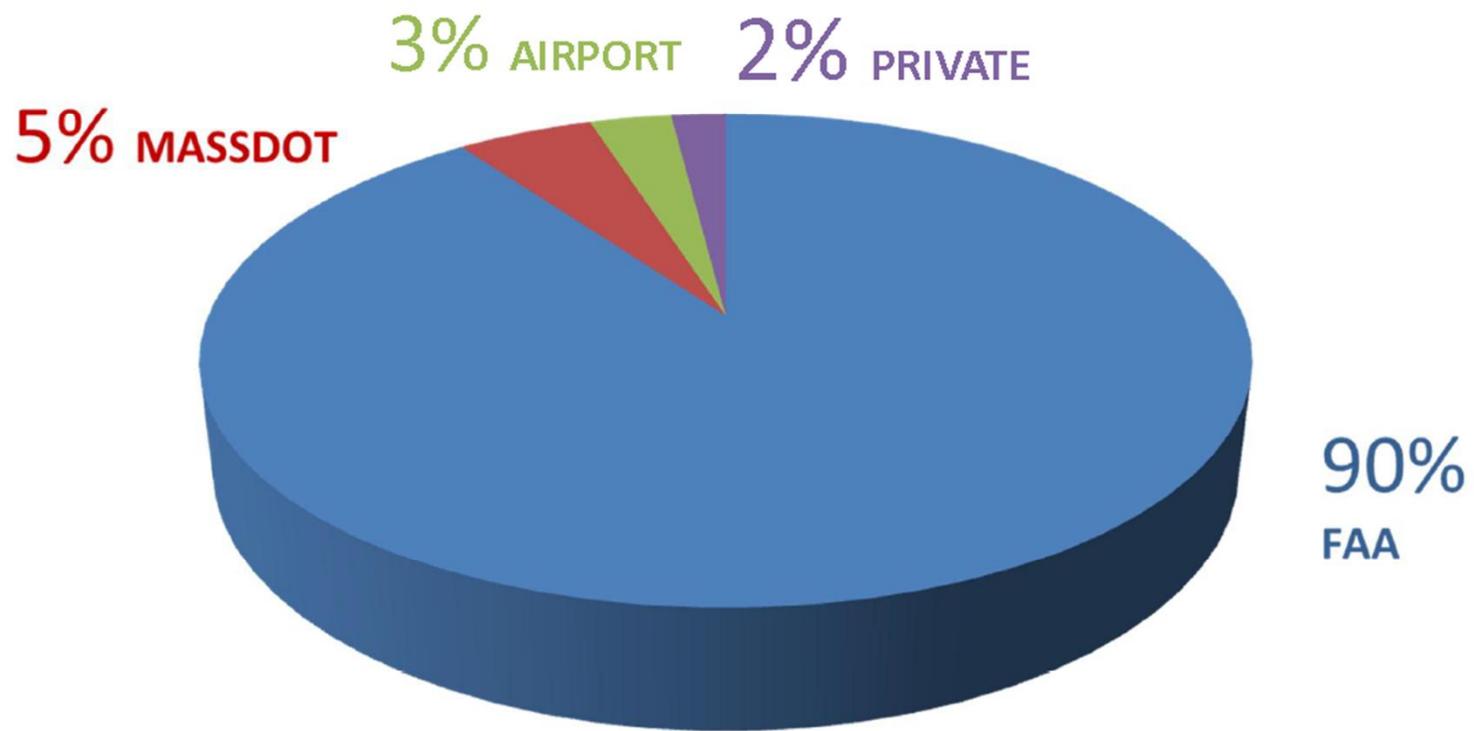


- **Sell & pump aviation fuel – revenue generation**
- **Park aircraft & collect fees**
- **Service & Support Pilots & Passengers**
- **Manage & Operate GA Terminal**



Operating Nantucket Airport

Who Pays Capital Costs?



Operating Nantucket Airport

Who Pays Capital Costs?

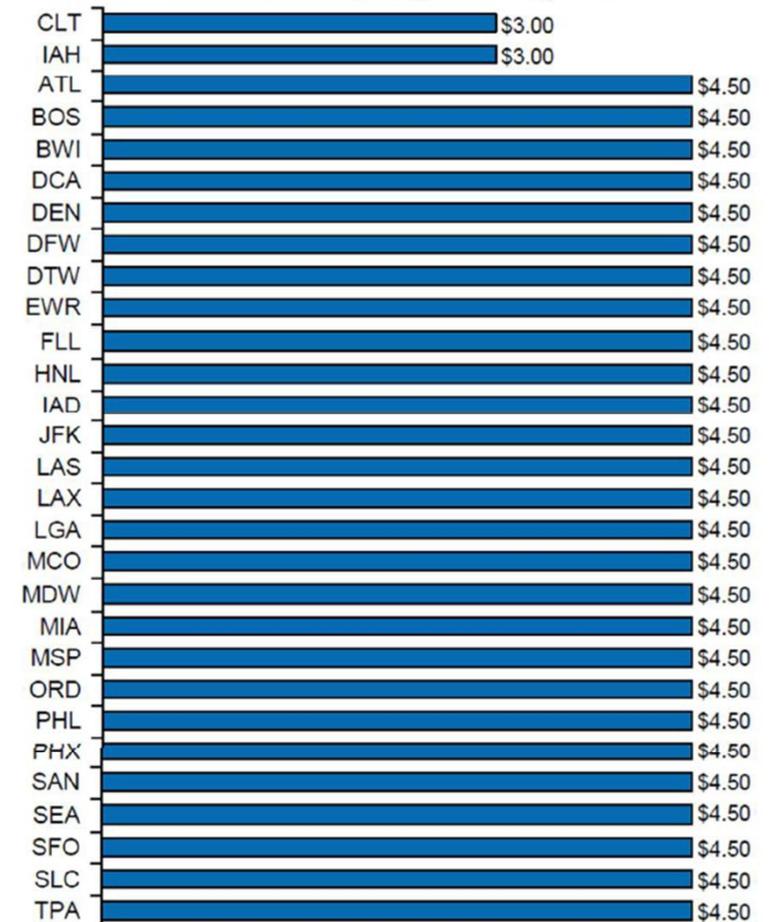
- **FAA Airport Improvement Program (AIP)**
- **MassDOT Airport Safety & Maint. Program (ASMP)**
- **Passenger Facility Charges (PFC)**
- **Bonds (G.O., GARB, PFC, Special Facility, etc.)**
- **Airport Revenues & Reserve Fund**

Passenger Facility Charges (PFCs) are added to each ticket, and most major airports charge the maximum permitted amount

Passenger Facility Charges

- PFCs are capped at \$4.50 per passenger by Congress
- Airports would like this limit to be raised
- The PFCs collected at an airport can only be spent on improvements at that same airport
- PFCs are also restricted in the way they can be used
 - PFCs can't be spent on revenue-generating projects
 - This includes parking garages and terminal space used by concessionaires

PFCs by airport
October 2011; Major US airports



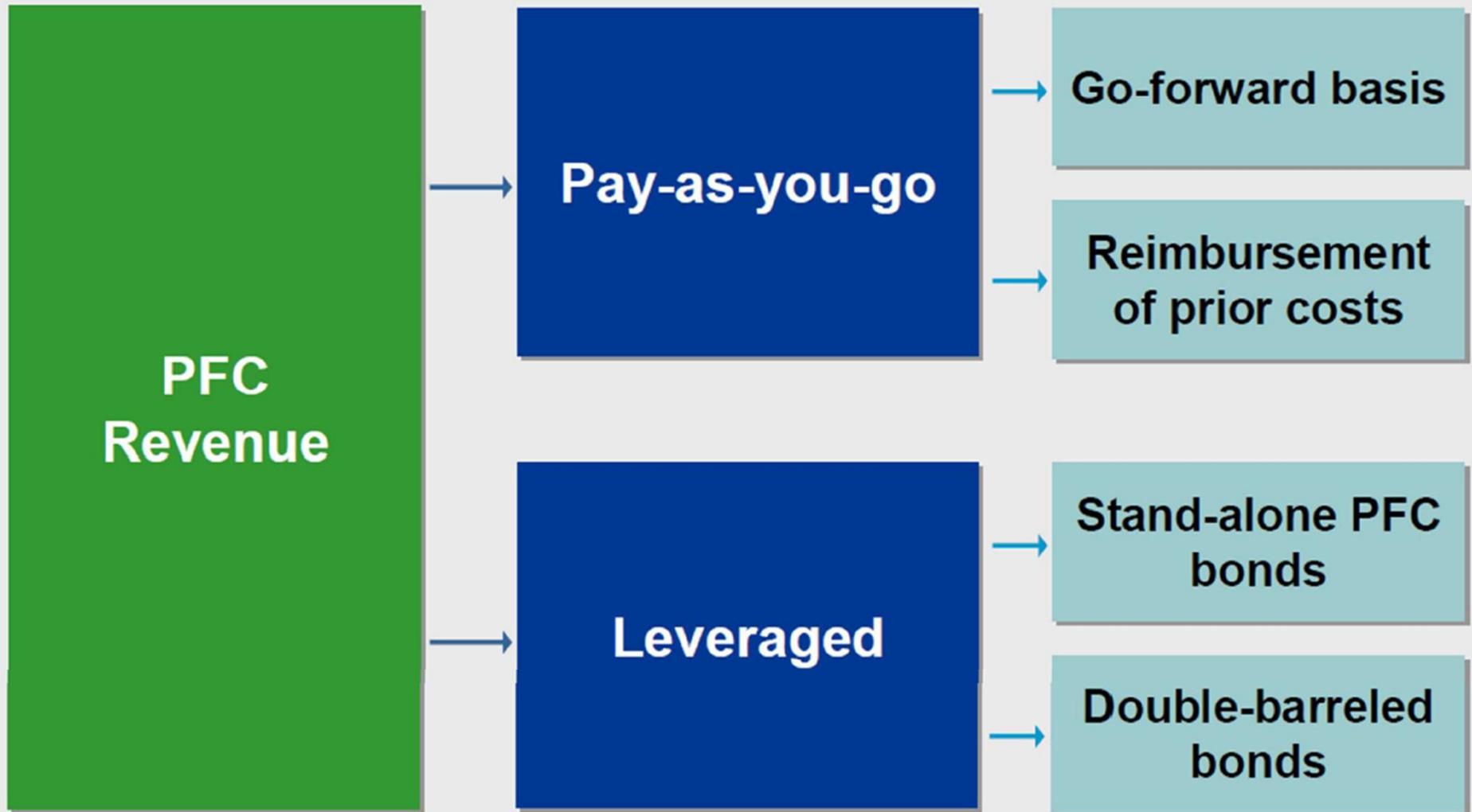
Sources: FAA, ACI



- **\$1, \$2, \$3, \$4, or \$4.50 per eligible passenger per segment**
- **Eligibility**
 - Preserve or enhance capacity, safety, or security
 - Reduce noise or mitigate noise impacts
 - Enhance competition
 - For \$4 or \$4.50 PFC at a large/medium-hub airport must demonstrate a “significant contribution”
- **Eligibility generally same as AIP**
 - Terminals primarily for movement of passengers and baggage in non-revenue producing areas (gates, bag claim/makeup, and loading bridges)
 - Excludes revenue-producing areas (concessions, airline ticketing, parking, rental car facilities, administration, and maintenance)
- **Can be used on a pay-as-you-go basis or leveraged**

PFCs Provide Flexibility in Funding

PFC Funding Approaches



Taxes and Carrier Imposed Fees: JFK-ACK

Summer 2014

- **Base Fare \$117.20**
- **U.S. Tax \$8.80**
- **U.S. September 11th Security Fee \$5.00**
- **Passenger Facilities Charge \$4.50**
- **U.S. Segment Fees \$0.00**
- **Total Fare \$135.50**

Questions and Discussion



AVIATION ACTIVITY AT ACK

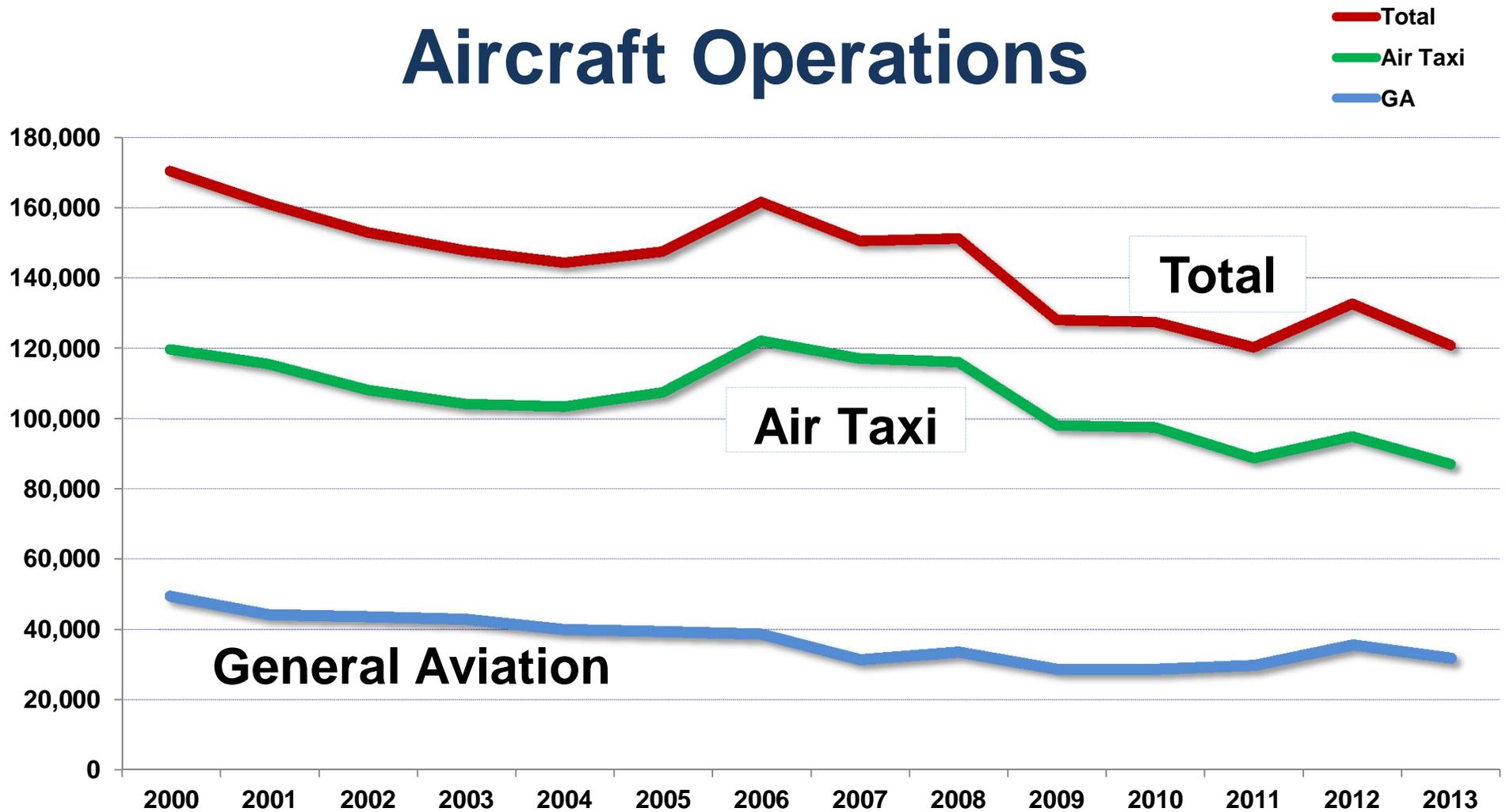


Definition of Terms

- **Air Carrier** – Major Airline – FAR Part 121
- **Air Taxi** – Scheduled – FAR Part 135
- **Air Taxi** – Non-Scheduled On Demand – FAR Part 135
- **Aircraft Operation** – 1 Takeoff or Landing
- **Passenger Enplanement** – 1 Passenger Boarding Flight
- **General Aviation** – All civil aviation *except* airlines
- **Local** – Operation in vicinity of airport – training
- **Itinerant / Transient** - To or From Another Airport



Aircraft Operations

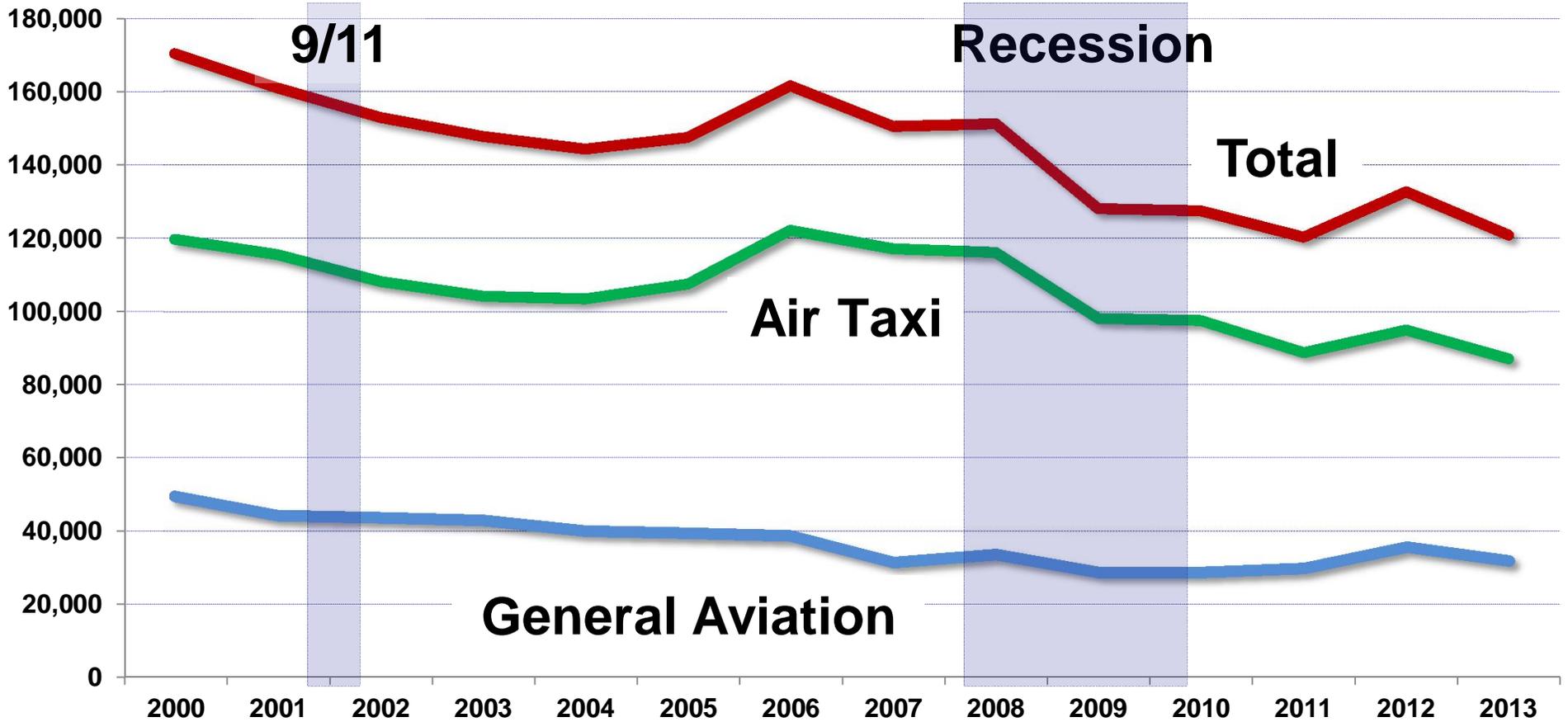


- Between 2000 and 2013 aircraft operations (takeoffs and landings) decreased by 29%

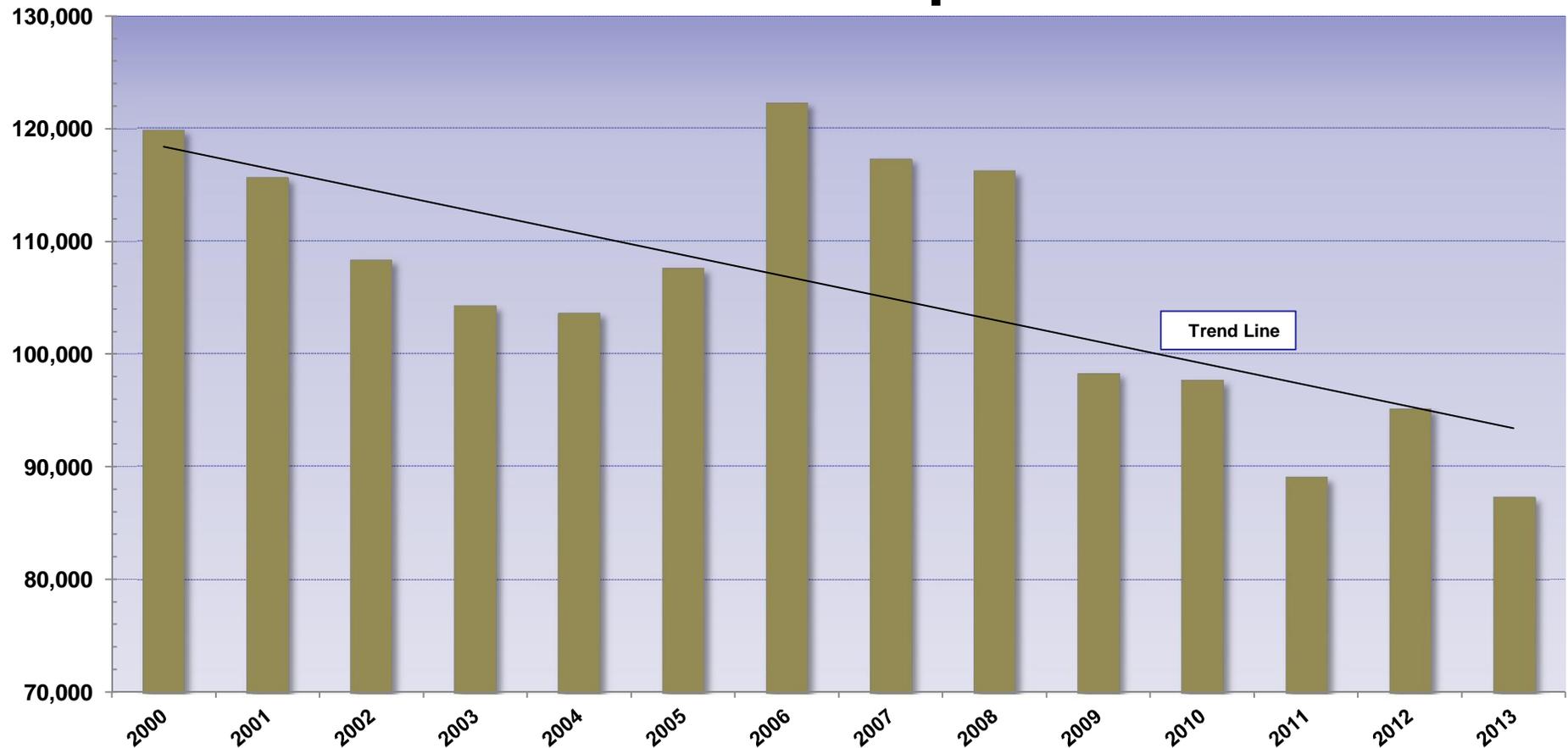


Aircraft Operations

- Total
- Air Taxi
- GA



Air Taxi Aircraft Operations



- Air taxi operations declined by 26%
- Still represent the majority of commercial operations at ACK
- The decline is due to various factors:
 - The recession of 2008-2010
 - Shift of passengers to high speed ferry service



FIVE SEPARATE TRAVEL MARKETS

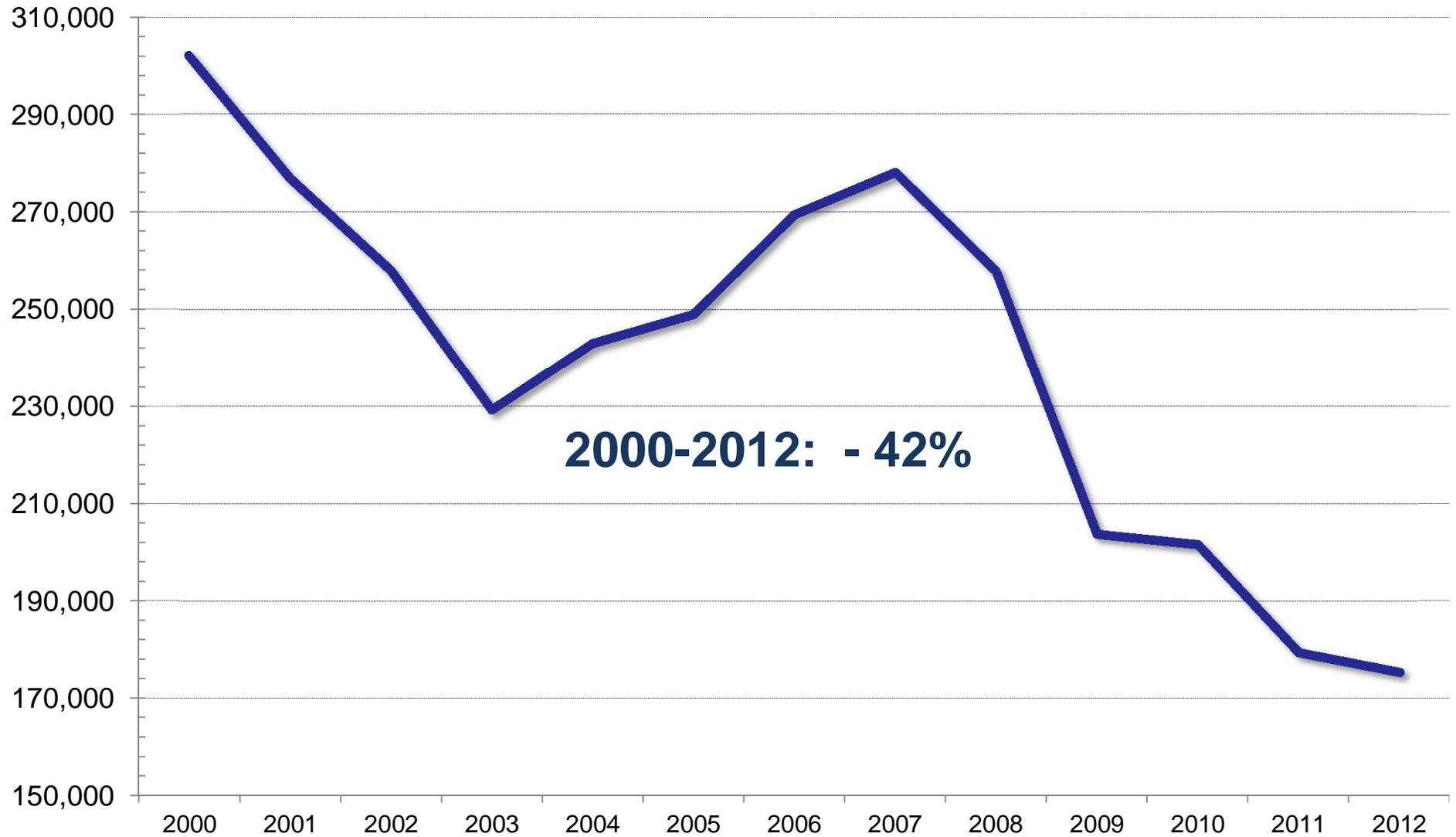
Year-round Island Residents	Primarily ferry passengers, as well as scheduled airline passengers, some owner-flown GA aircraft
Seasonal Island Resident	Primarily ferry passengers as well as scheduled airline passengers
Second home owners	Corporate aircraft, owner-flown GA traffic, private boat, scheduled airline, on-demand air taxi service, ferry.
Short-term Island visitors	Primarily ferry passengers, some owner-flown GA traffic, as well as some scheduled airline passengers
Daily workers ('commuters')	Primarily ferry passengers, as well as scheduled airline passengers

FIVE SEPARATE TRAVEL MARKETS

	Price Sensitivity	Time/Schedule Flexibility
Year-round Island Residents	High	High
Seasonal Island Resident	High-Medium	High-Medium
Second home owners	Low	Medium
Short-term Island visitors	High-Medium	Low
Daily workers ('commuters')	High-Medium	Low

Passenger Enplanements

Nantucket Airport



Passenger Enplanements

Nantucket Airport

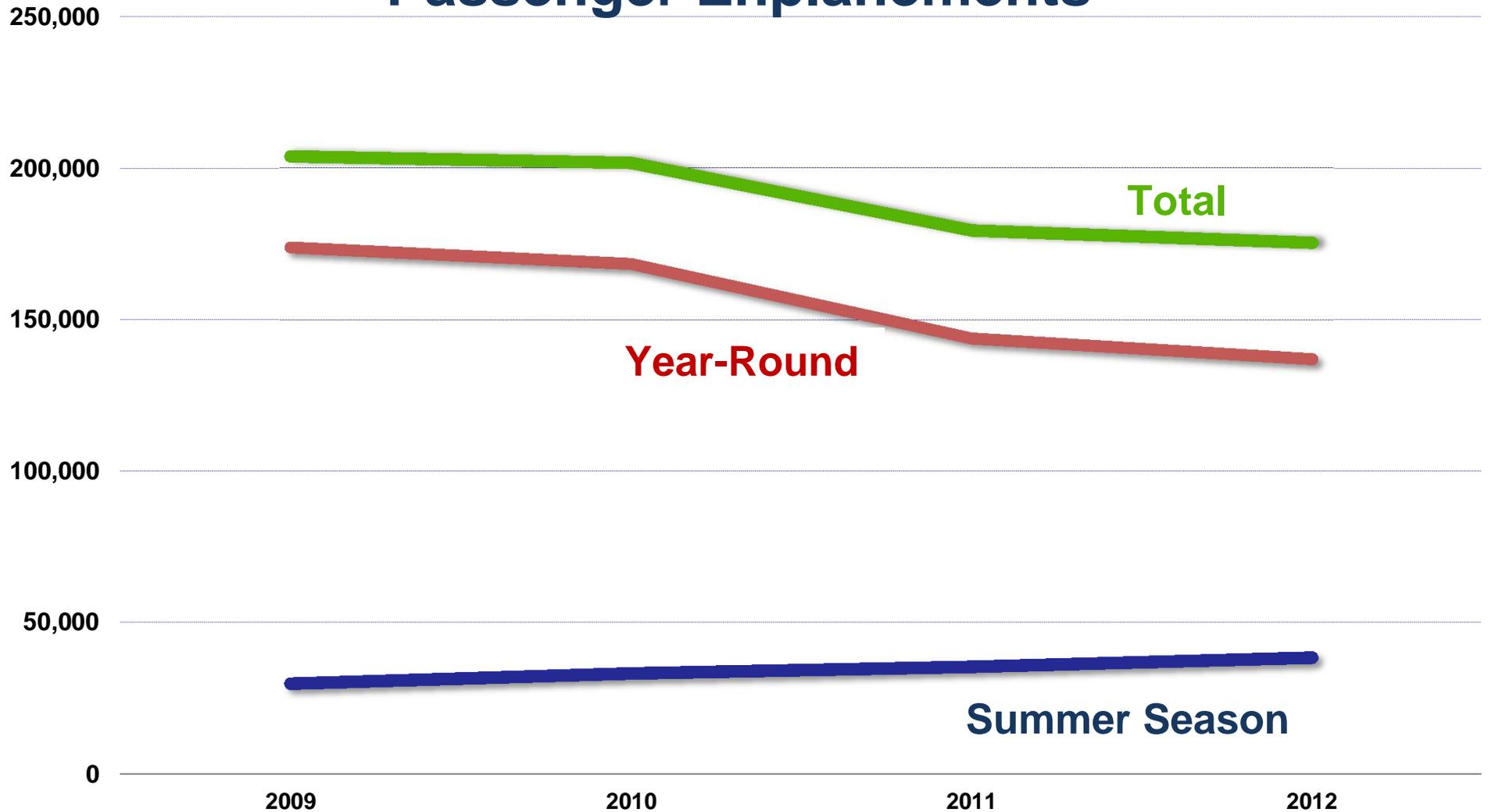


Year-Round & Summer Season Passenger Enplanements

C.Y.	Year-Round	Summer Season	Total Enplanements
2009	173,870 (85.3%)	29,916 (14.7%)	203,786 (100%)
2010	168,470 (83.5%)	33,168 (16.5%)	201,638 (100%)
2011	143,988 (80.3%)	35,422 (19.7%)	179,410 (100%)
2012	137,185 (78.2%)	38,235 (21.8%)	175,420 (100%)
Percent Change			
2009-2012	-21%	27.8%	-13.9%

Notes: Data source: Nantucket Airport. Summer season typically provided between June-September. Year-round service provided by Cape Air, Nantucket Airlines, and Island Airlines. Summer season service provided by a number of regional airlines operating under contract to major airlines (US Airways, United, Delta). JetBlue operates own regional service. Different hub destinations were served between 2009-2012

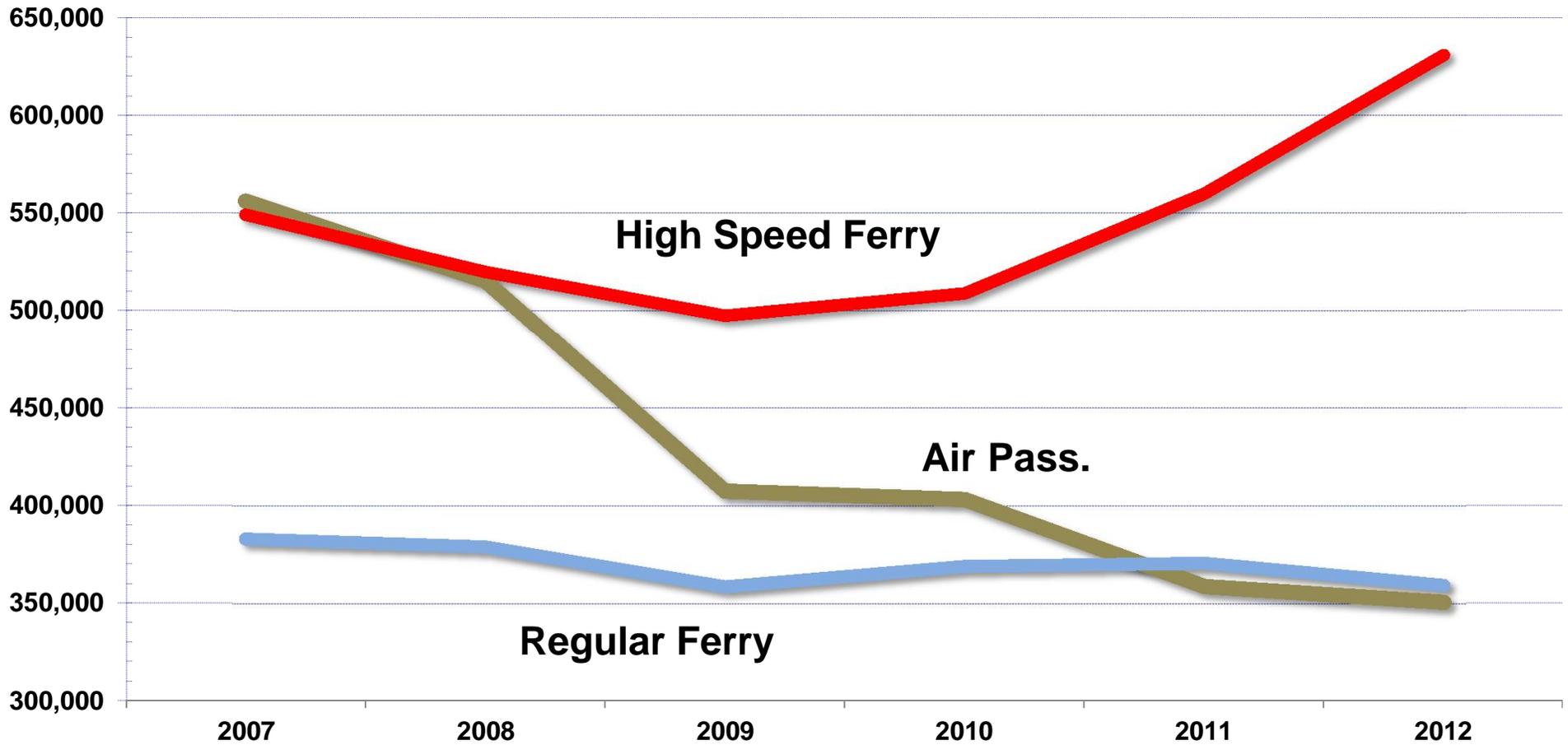
Year-Round & Summer Season Passenger Enplanements



Airline & Ferry Passengers

Nantucket - Hyannis

- AirPassengers
- Regular Ferry
- High Speed Ferry



Hyannis - Nantucket Round Trip Fare + One-Way Travel Times

<u>Airline</u>	<u>RT Fare</u>	<u>OW Trip</u>	<u>Ferry Line</u>	<u>RT Fare</u>	<u>OW Trip</u>
Cape Air Discount	\$99.00	20 min	SSA Regular	\$35.00	2:15 min
Cape Air Unrestricted	\$158.00	20 min	SSA High Speed	\$69.00	60 min
Island Airlines	\$147.00	20 min	Hy-Line Regular	\$45.00	2:15 min
			Hy-Line High Speed	\$77.00	60 min

Sources: Company web sites, December 2013. Fares shown per person/adult. Ferry terminal in downtown.

Note: Variety of fares available depending on advance purchase, OW vs. RT, commuter tickets, etc.

YEAR-ROUND AIR SERVICE



- Very Short Haul
- High Frequency
- FAR Part 135 Air Taxi
- Primarily Origin & Destination

- ACK-HYA + ACK-BOS Primary Markets
- Compete against SSA & Hy-Line Ferries



Northeast route map



December 2012 route map (including summer-seasonal service)



- **Predominantly EAS Markets**

Potential Replacement for Cessna 402

Tecnam's P2012 Traveler



- Not yet begun FAA certification or flight test
- Uses piston engines & 100LL Avgas

SEASONAL AIR SERVICE AT NANTUCKET



- Major Airlines
- Regional Partners
- Short Haul (<500 miles)
- Hub Feed + Beyond Markets
- FAR Part 121
- Not competing with Ferries
- Lower Fare Sensitivity



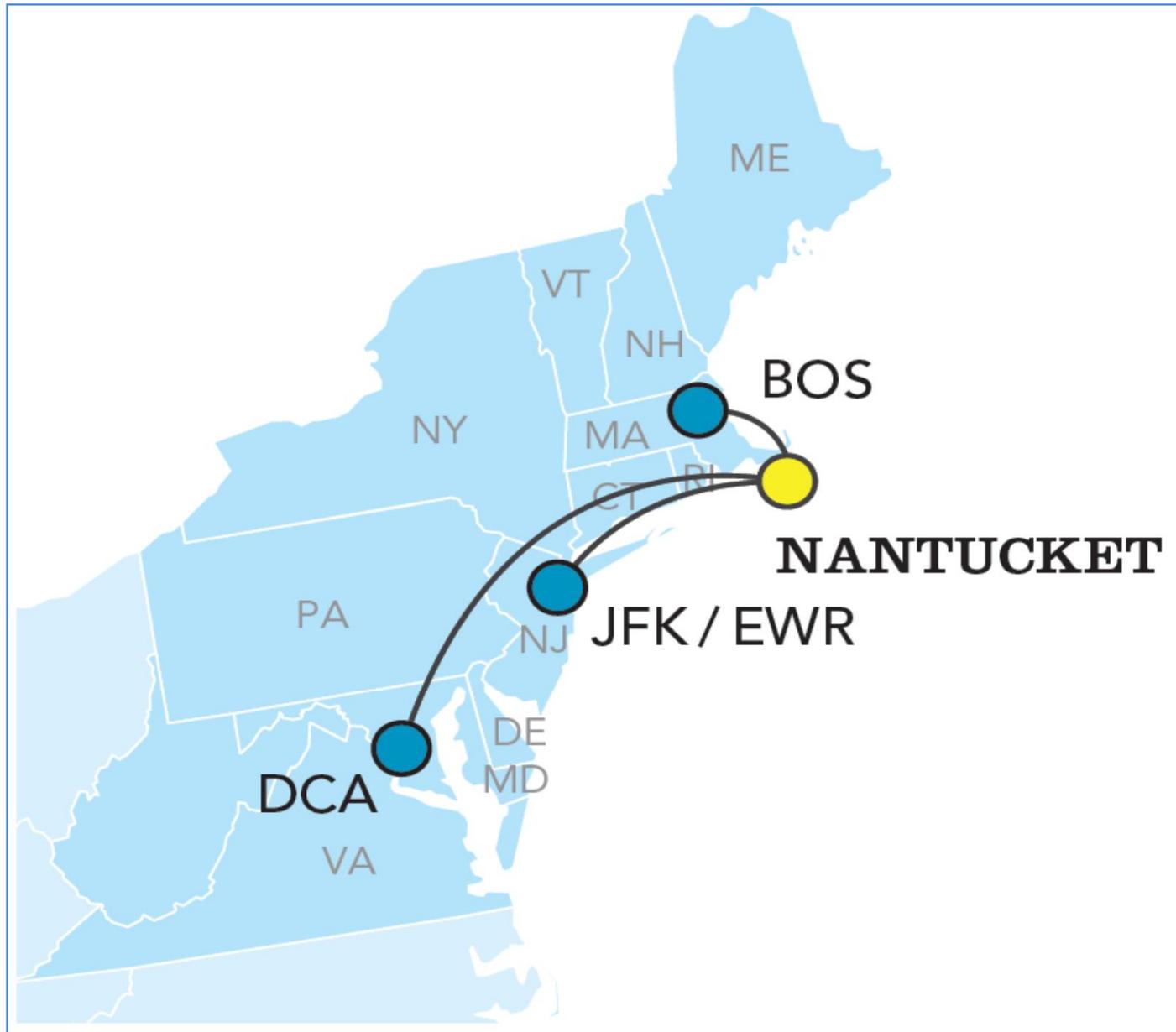
MAJOR AIRLINE TRENDS



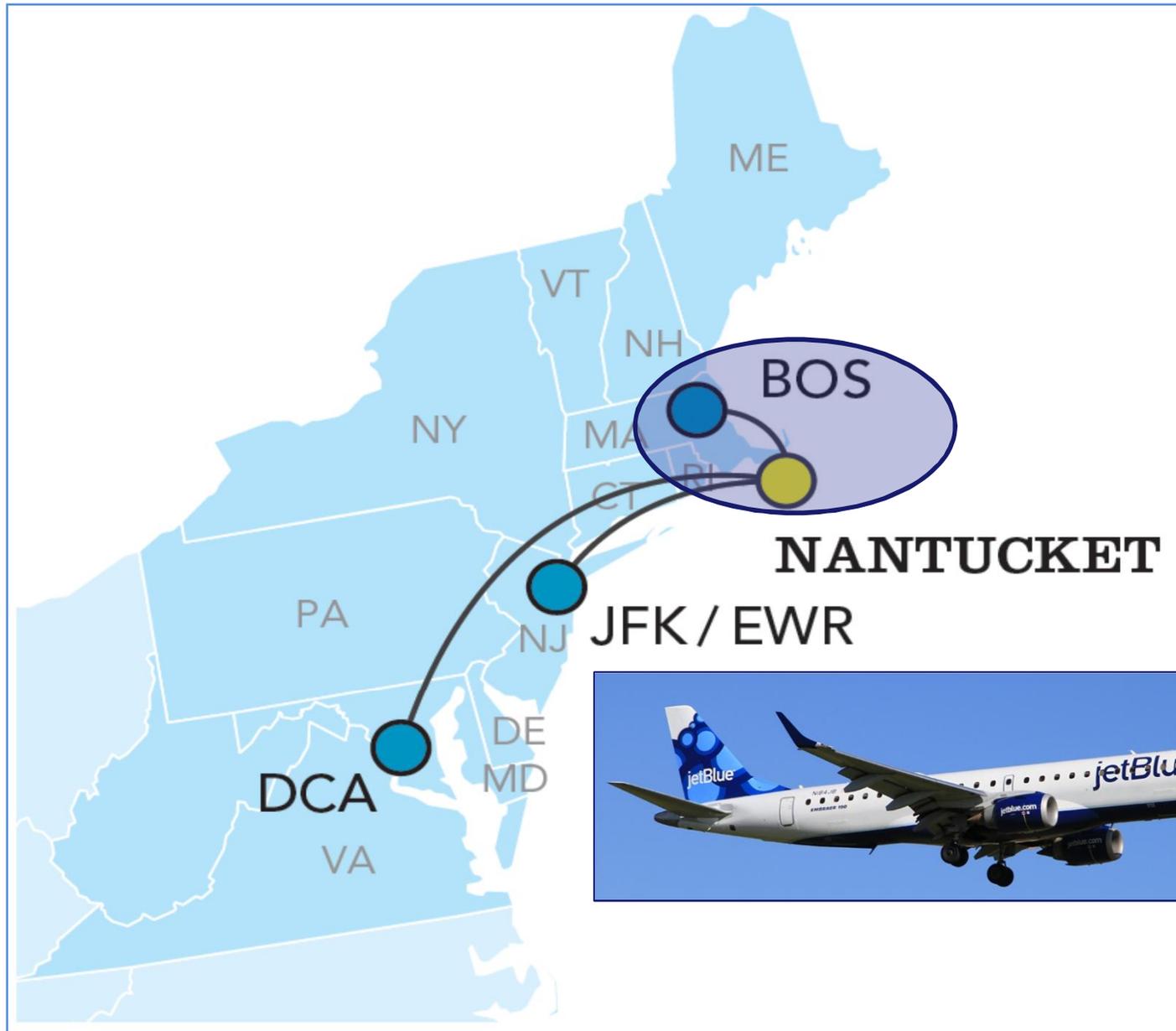
- Industry Consolidation
- Limited Capacity Growth
- Ancillary Fees
- Regional Carriers:
 - ➔ 50-seat A/C retired
 - ➔ 70-100 seat jet replacements



SEASONAL AIR SERVICE AT NANTUCKET



SEASONAL AIR SERVICE AT NANTUCKET



SEASONAL AIR SERVICE AT NANTUCKET

Mainline Origin-Destination Passengers

ID	Top 10 O&D Markets	Dist. (Miles)	Passengers	Avg. Fare	% Pass.
JFK	New York JFK, NY	199	37,230	\$171	55.7%
DCA	Washington Reagan, DC	405	9,830	\$257	14.7%
BOS	Boston, MA	91	6,990	\$108	10.5%
ORD	Chicago O'Hare, IL	922	3,630	\$233	5.4%
SFO	San Francisco, CA	2,761	2,020	\$391	3.0%
EWR	Newark, NJ	218	1,540	\$222	2.3%
CLT	Charlotte, NC	722	1,530	\$224	2.3%
LAX	Los Angeles, CA	2,660	1,440	\$392	2.2%
BWI	Baltimore, MD	377	1,380	\$194	2.1%
FLL	Fort Lauderdale, FL	1,197	1,290	\$303	1.9%
Total			66,880		100%



Source: US DOT

SEASONAL AIR SERVICE AT NANTUCKET

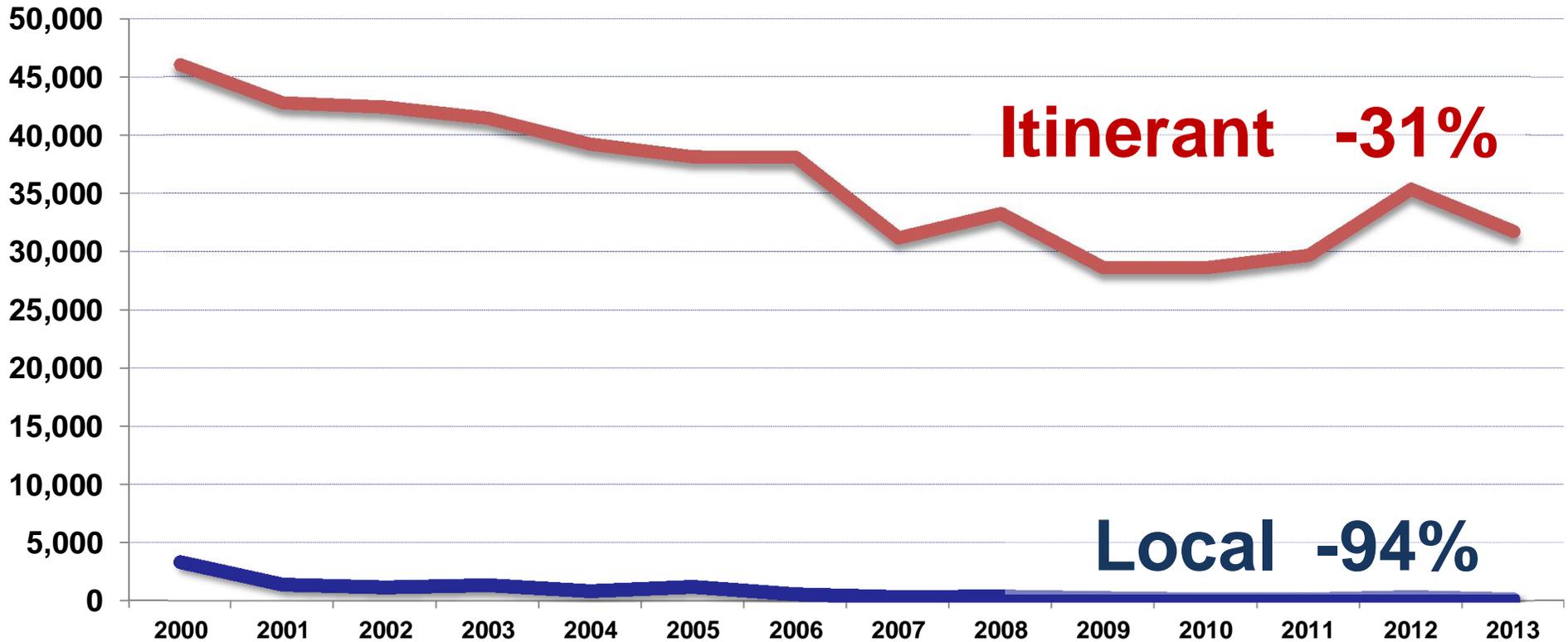
Mainline Origin-Destination Passengers

Metro Region	Passengers	% Pass.
New York Metro	38,770	58.0%
Washington DC	11,210	16.7%
Boston, MA	6,990	10.5%
Chicago O'Hare, IL	3,630	5.4%
San Francisco, CA	2,020	3.0%
Charlotte, NC	1,530	2.3%
Los Angeles, CA	1,440	2.2%
Fort Lauderdale, FL	1,290	1.9%
Total	66,880	100%



NY-DC-BOS Metro Markets = 85.2% of all O&D Passengers

GENERAL AVIATION OPERATIONS



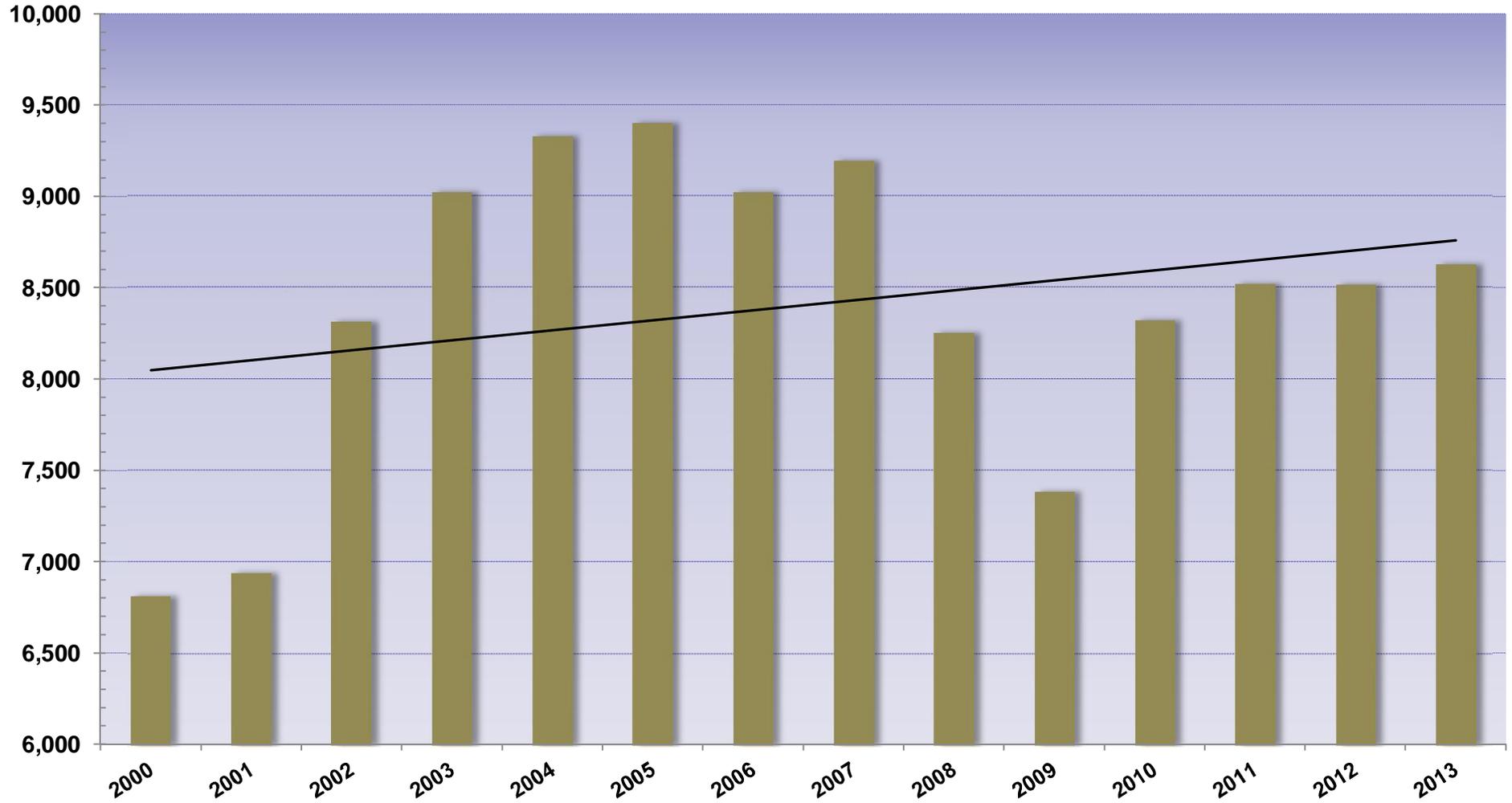
GENERAL AVIATION TRENDS



- Rising Cost of Ownership + Operation
- Owner-Flown Activity Declining
- Training Activity Declining
- Average Age of Pilots & Aircraft Increasing
- Airport & Airspace Security Impacts GA



BUSINESS JET OPERATIONS



Source: FAA TFMS

Questions and Discussion



A hand holding a pen pointing to a line graph on a blue background. The graph shows a red line with several peaks and troughs, set against a background of vertical blue bars and a dotted line. The overall scene is a close-up of a person analyzing data.

Aviation Forecasts of Demand

"I always avoid prophesying beforehand because it is much better to prophesy after the event has already taken place." -Winston Churchill

"Prophecy is a good line of business, but it is full of risks." -Mark Twain

"An expert is one who will know tomorrow why the things he predicted yesterday didn't happen today." -Evan Esar

"If you have to forecast, forecast often." -Edgar R. Fiedler



Forecast Scenarios:

- **Status Quo**
- **Downward Pressure**
- **Upward Trends**

FUTURE YEAR-ROUND AIR SERVICE



- **Continue to Operate C-402**
- **Numerous Risks from Increased:**
 - ✓ **Competition from Ferry Service**
 - ✓ **Cost of 100LL Avgas**
 - ✓ **Airport & Airspace Security**
 - ✓ **Operating & Maintenance Costs**
 - ✓ **Reduced/Loss of EAS Program**



FUTURE SEASONAL AIR SERVICE



- Long-Term Hub Connection to ACK
- Shifting Hubs (PHL, LGA, DCA)
- Short-Haul (<500 miles)
- Consolidation Impacts
- Ancillary Fees + Rising Ticket Prices
- Larger Aircraft Impact on Frequency
- Impact on Ramp Space & Terminal



FUTURE BUSINESS JET ACTIVITY



- **Very Mature Market – Do Not Anticipate Rapid Growth**
- **Long-Term Growth Steady**
- **Larger Aircraft**
 - ✓ **Ramp Space**
 - ✓ **Fuel Tankering – FBO Sales**
- **Activity Tied to Stock Market, Corp. Profits, Real Estate**



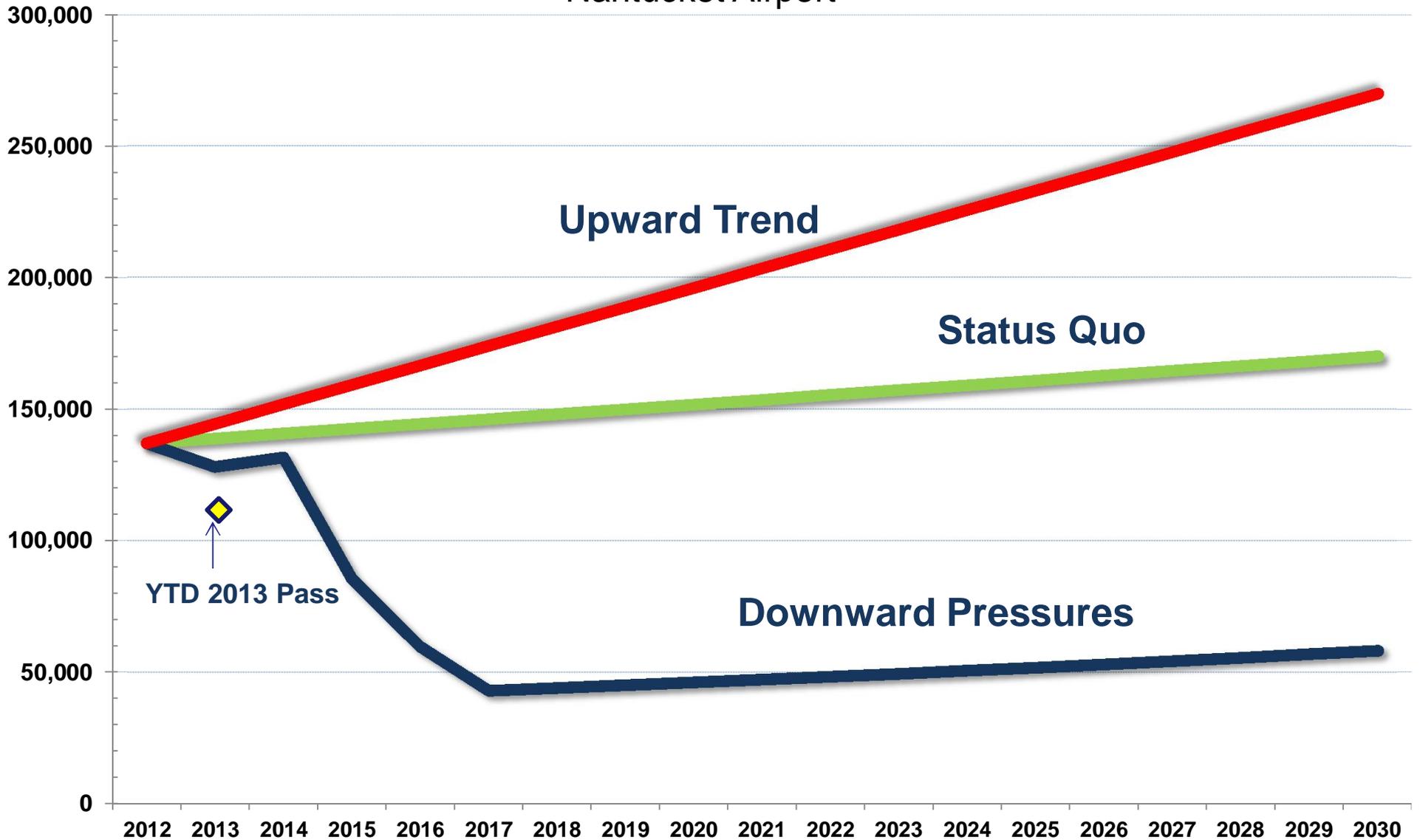
FUTURE BUSINESS JET ACTIVITY



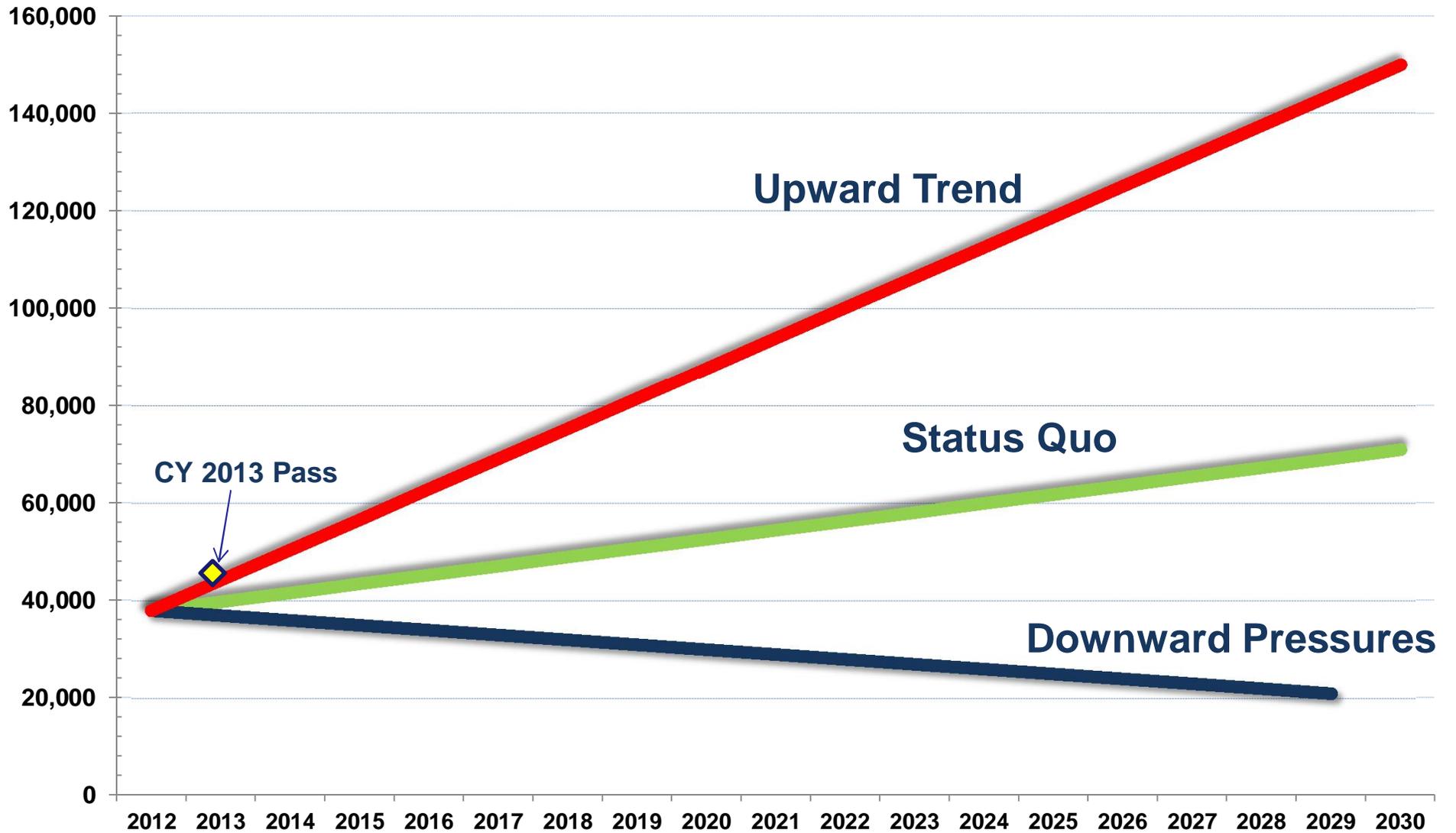
- Very Mature Market – Do Not Anticipate Rapid Growth
- Long-Term Growth Steady – **if these remain steady**
- Larger Aircraft
 - ✓ Ramp Space
 - ✓ Fuel Tankering – FBO Sales
- Activity Tied to **Stock Market, Corp. Profits, Real Estate**
- **Fuel Prices**



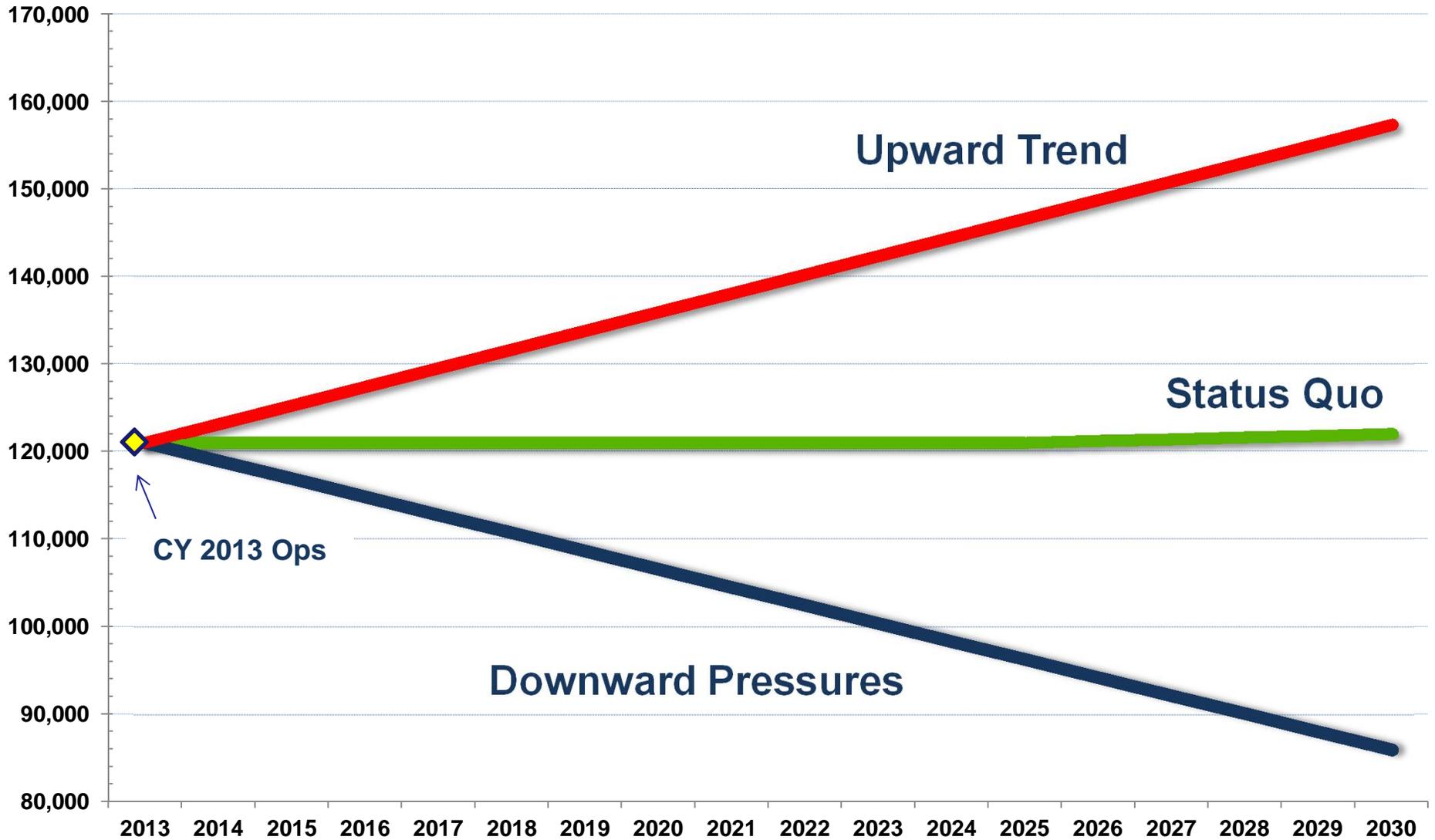
Forecast Scenarios Year-Round Passenger Enplanements Nantucket Airport



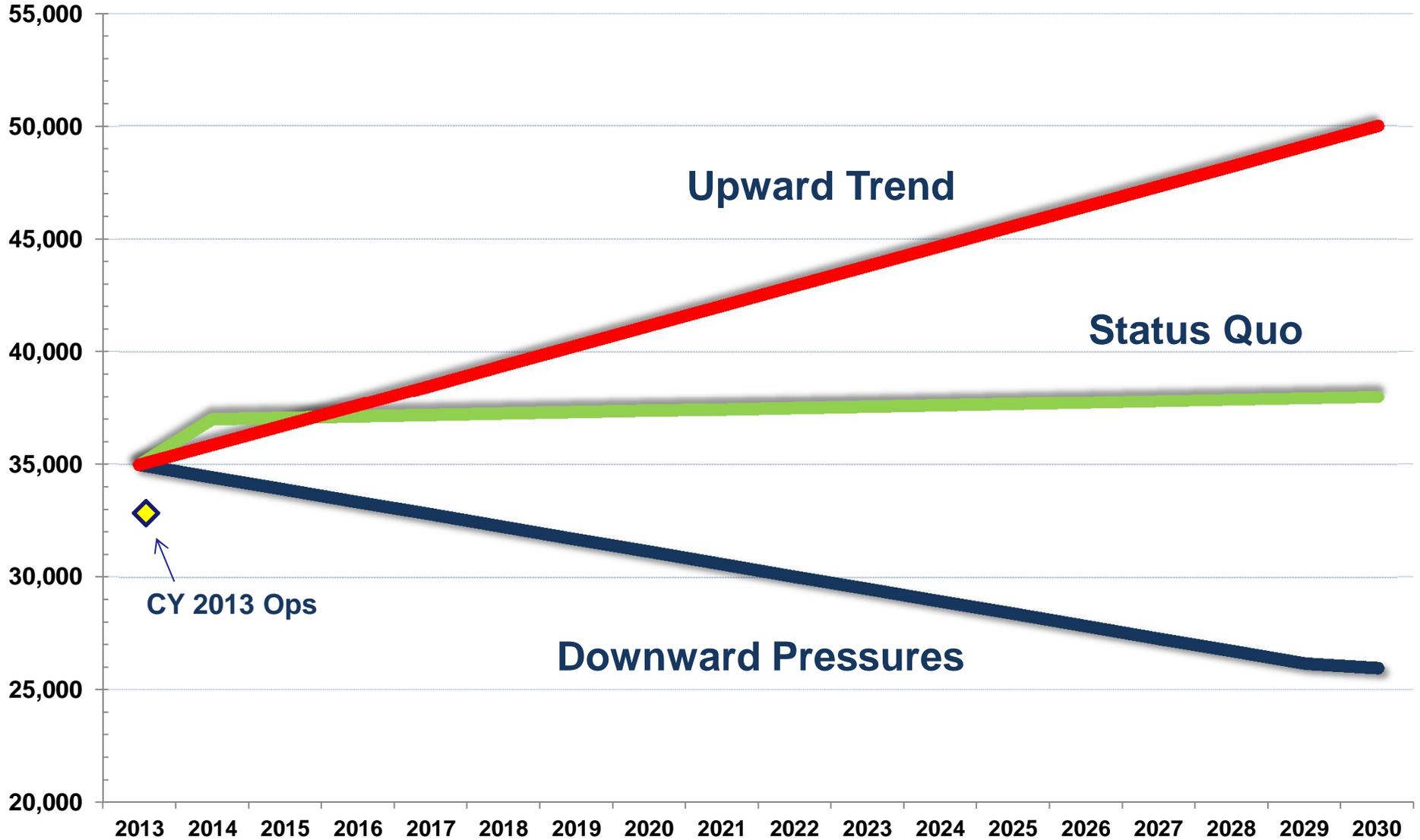
Forecast Scenarios Summer Season Passenger Enplanements Nantucket Airport



Forecast Scenarios Total Aircraft Operations Nantucket Airport



Forecast Scenarios General Aviation Aircraft Operations Nantucket Airport





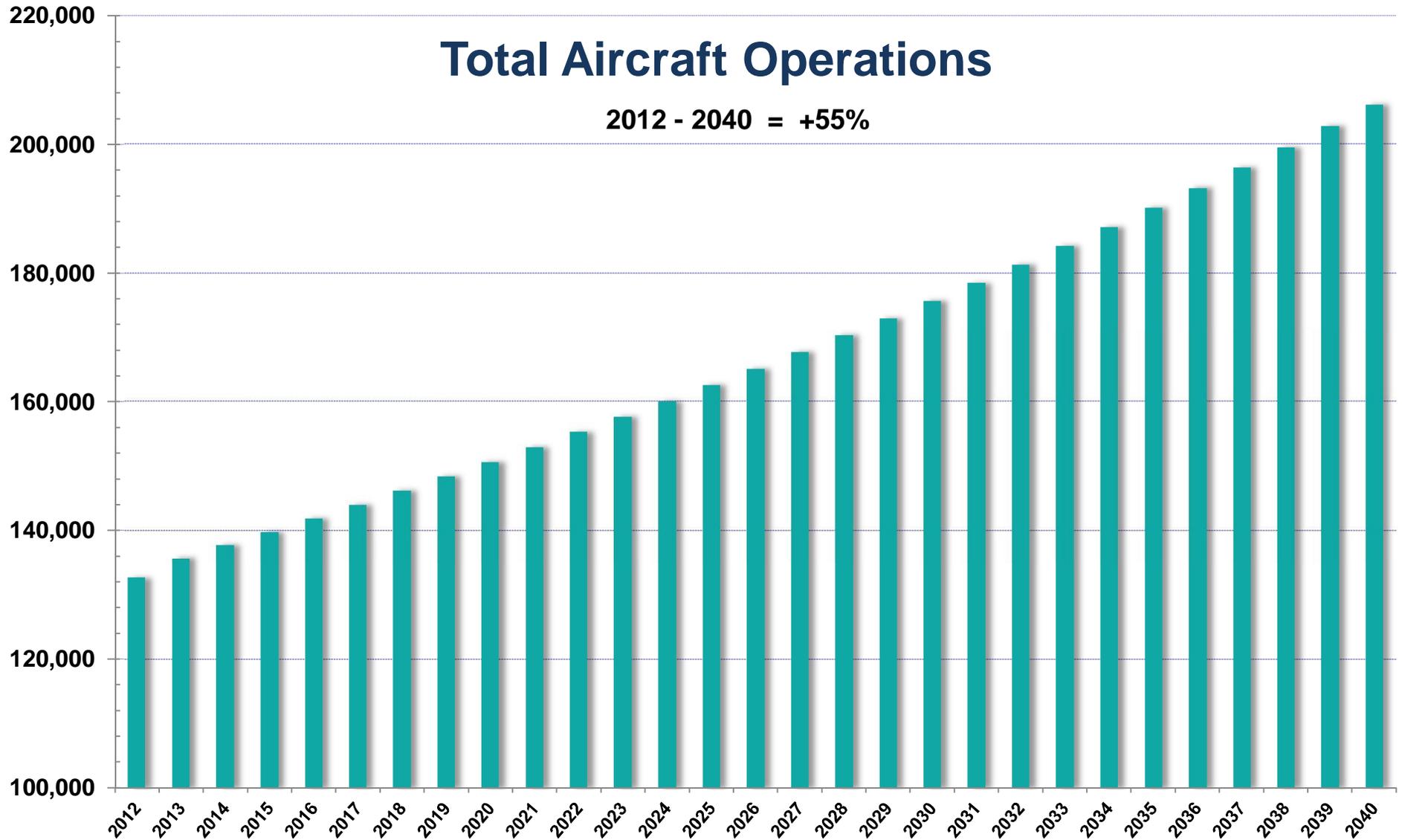
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FAA Terminal Area Forecast Nantucket Airport



FAA Terminal Area Forecast Nantucket Airport

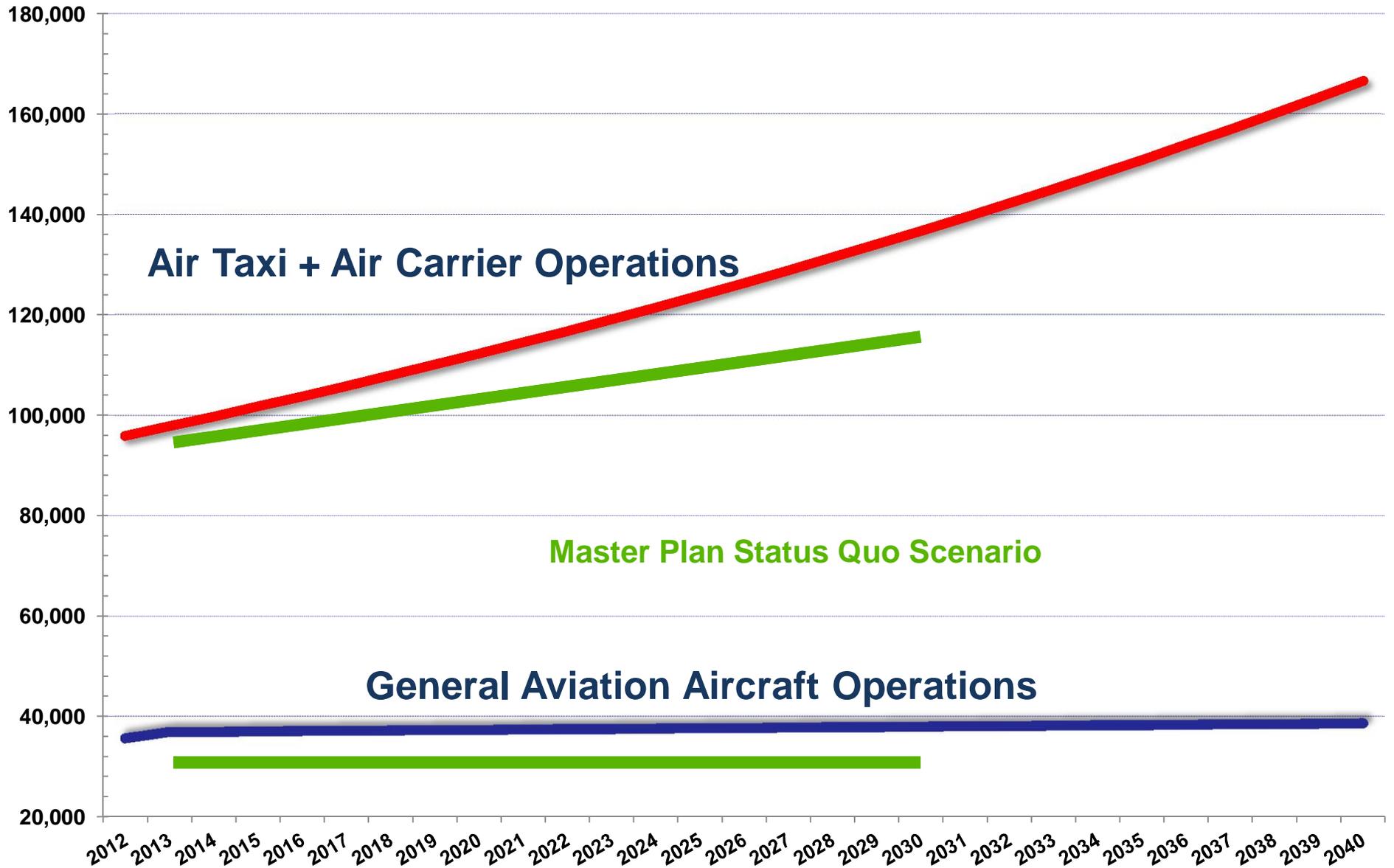
Total Aircraft Operations



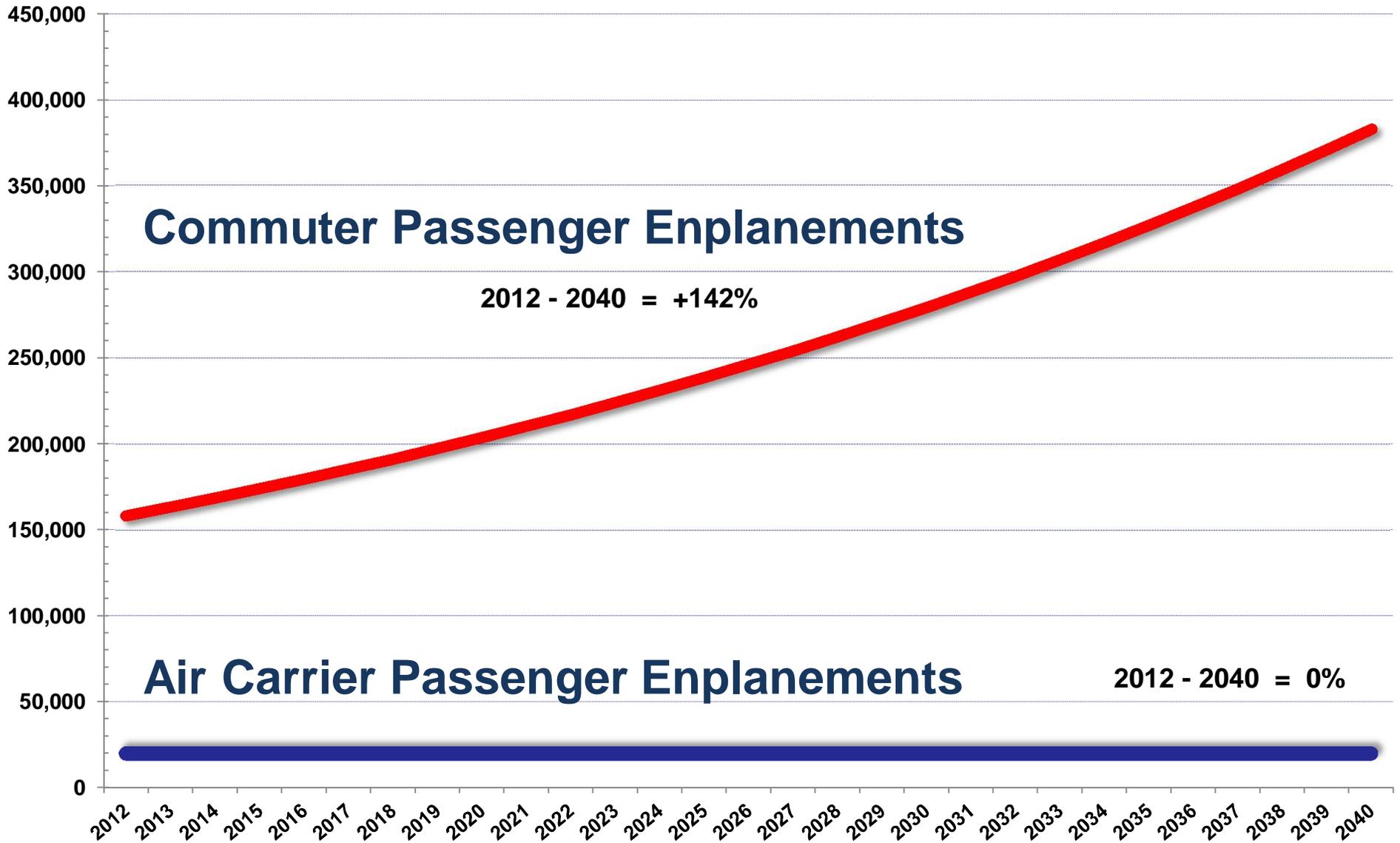
FAA Terminal Area Forecast Nantucket Airport



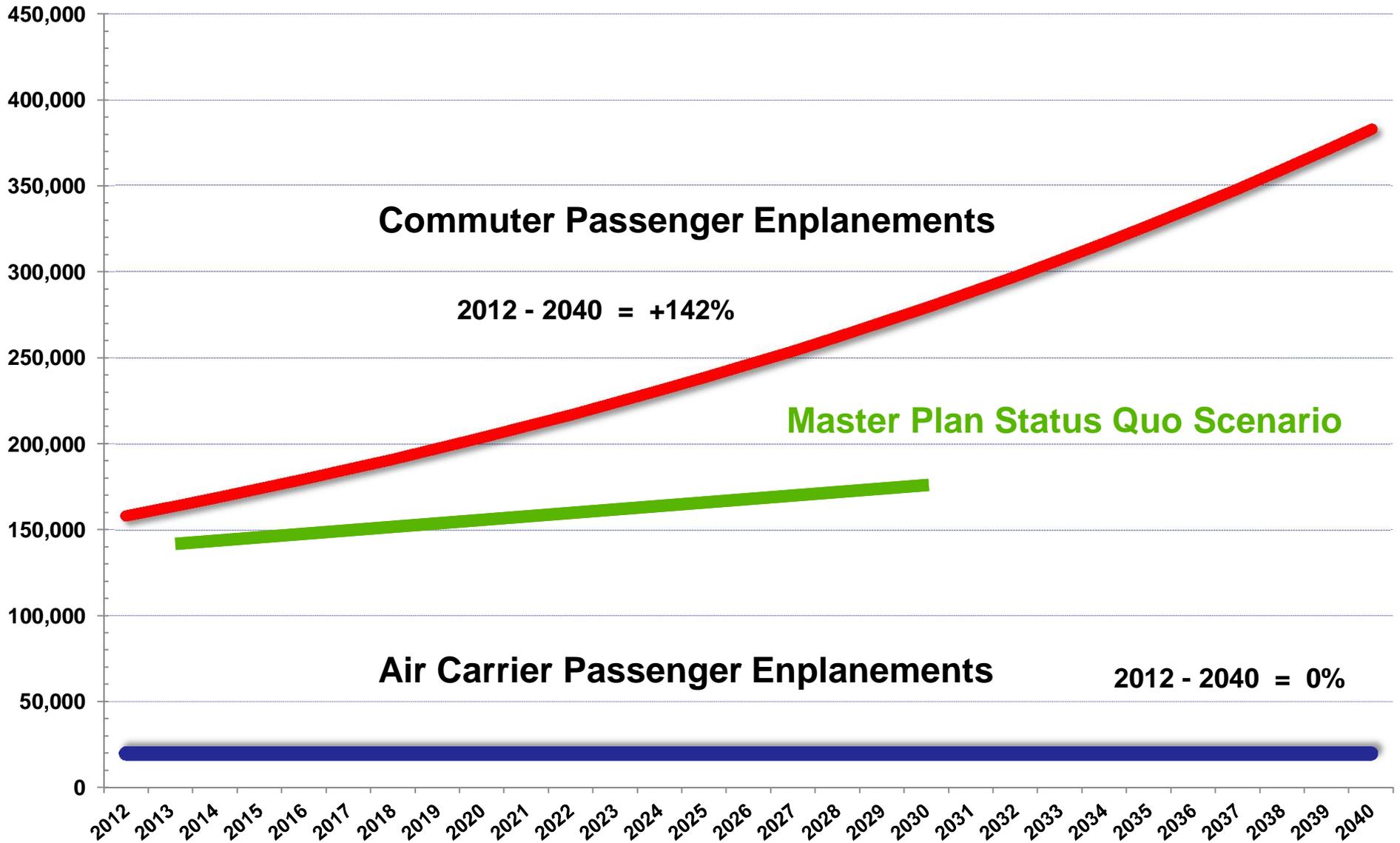
FAA Terminal Area Forecast Nantucket Airport



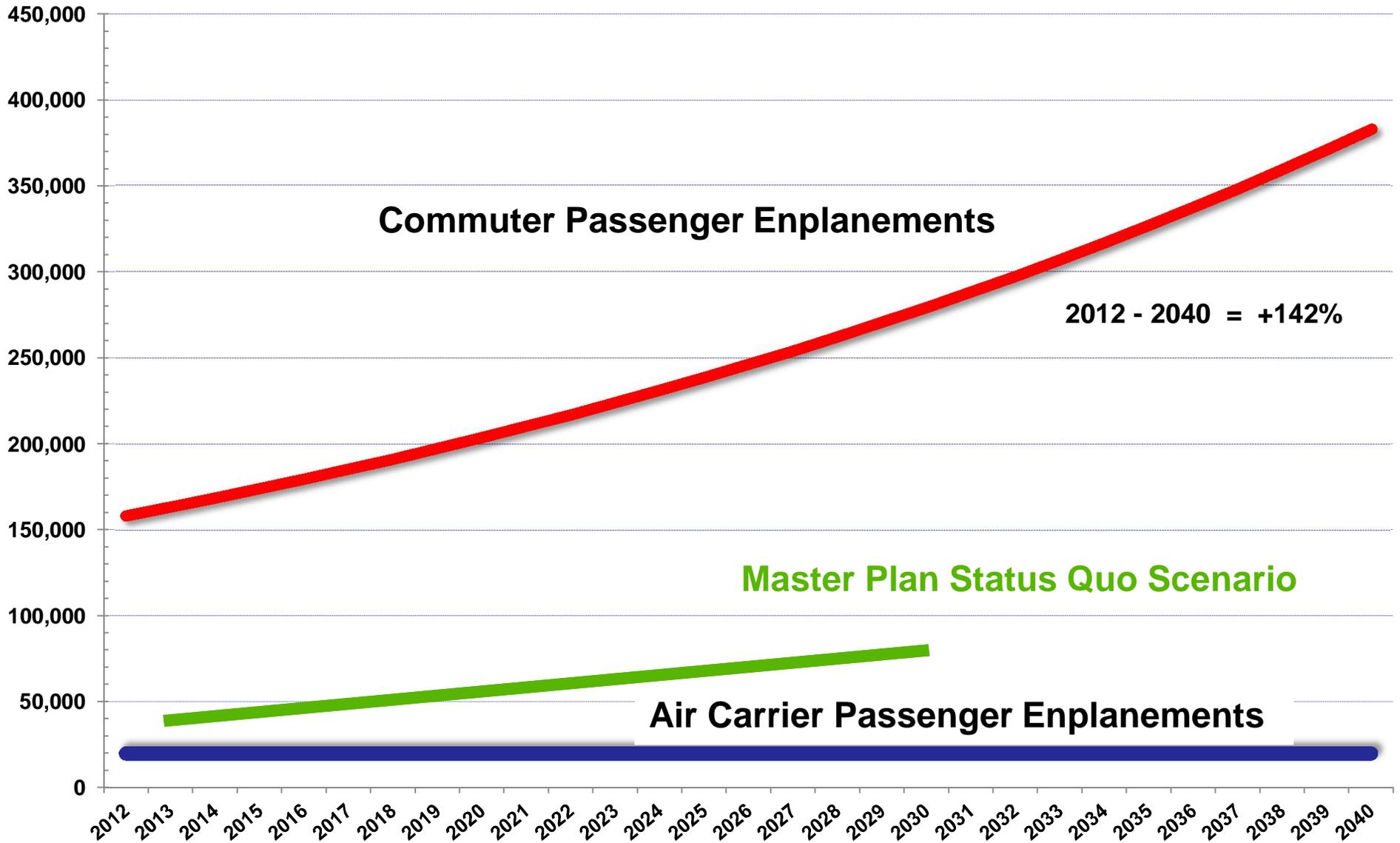
FAA Terminal Area Forecast Nantucket Airport



FAA Terminal Area Forecast Nantucket Airport



FAA Terminal Area Forecast Nantucket Airport



Airport Master Plan & FAA TAF Forecast Comparison

98

Passenger Enplanements

	<u>FAA TAF</u>	<u>AMP</u>	<u>% Diff.</u>
2018	211,484	196,996	-6.8%
2023	244,150	215,326	-11.8%

Air Carrier + Commuter (Air Taxi) Ops

	<u>FAA TAF</u>	<u>AMP</u>	<u>% Diff.</u>
2018	107,258	101,754	-5.1%
2023	118,425	108,185	-8.6%

General Aviation Aircraft Ops

	<u>FAA TAF</u>	<u>AMP</u>	<u>% Diff.</u>
2018	37,270	37,270	0.0%
2023	37,580	37,580	0.0%

NEXT STEPS, MILESTONES & SCHEDULE



-
- ✓ Facility Needs
 - ✓ Alternative Concepts
 - ✓ Potential Impacts

 - ❖ Late Spring / Early Summer 2014



Questions and Discussion

