Overview


Office of Airport Planning and Programming
September 2012
The National Plan

Secretary of Transportation is required to:
• Maintain a plan for developing public-use airports that are important to national transportation system
• Publish this Plan every other year

The Plan:
• Identify types of projects & AIP eligible estimated costs necessary to provide a safe, efficient, and integrated system of airports
• Covers 5 fiscal years (2013 – 2017)
• Used to calculate nonprimary entitlements by airport
• Includes 4 chapters and 2 appendices

Changes since 2011 Report to Congress:
• Content streamlined
• New way of describing the function and roles of general aviation airports from May 2012 GA Study

Last 5 reports available at: http://www.faa.gov/airports/planning_capacity/npias/
## Composition of U.S. Airport System

<table>
<thead>
<tr>
<th>Type of Facility</th>
<th>Total U.S. Facilities</th>
<th>Private-Use Facilities</th>
<th>Public-Use Facilities</th>
<th>NPIAS Facilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airport</td>
<td>13,451</td>
<td>8,571</td>
<td>4,880</td>
<td>3,280</td>
</tr>
<tr>
<td>Heliport</td>
<td>5,658</td>
<td>5,590</td>
<td>68</td>
<td>10</td>
</tr>
<tr>
<td>Seaplane Base</td>
<td>498</td>
<td>283</td>
<td>215</td>
<td>40</td>
</tr>
<tr>
<td>Balloonport</td>
<td>13</td>
<td>12</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Gliderport</td>
<td>35</td>
<td>31</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Ultralight</td>
<td>131</td>
<td>128</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>19,786</strong></td>
<td><strong>14,615</strong></td>
<td><strong>5,171</strong></td>
<td><strong>3,330</strong></td>
</tr>
</tbody>
</table>

### 3,355 NPIAS Airports
(Of the 5,171 existing public use airports, 64% are NPIAS)

- **3,330 Existing**
  - 3,253 Public Owned
  - 77 Private Owned

- **25 Proposed**

#### Breakdown by Type:

- **378 Primary**
- **121 Nonprimary Commercial Service**
- **268 Reliever**
- **2,563 General Aviation**
- **2 Primary**
- **4 Nonprimary Commercial Service**
- **0 Reliever**
- **19 General Aviation**
NPIAS Development Estimates

• Compiled using information available in 2011 and early 2012:
   Planning documents such as airport master plans and regional & state system plans
   Information provided by sponsor’s capital improvement plans
   Information from airport inspections

• Reviewed to ensure project is:
   AIP eligible
   Justified by forecast or design standards
   Feasible development for the airport

• Unfunded development only

• Categorized by type of project (9) & airport (8)
How NPIAS development has changed over time

<table>
<thead>
<tr>
<th>Base Year of Published Report</th>
<th>Development Cost ($Billions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2013</td>
<td>42.5</td>
</tr>
<tr>
<td>2011</td>
<td>52.3</td>
</tr>
<tr>
<td>2009</td>
<td>49.7</td>
</tr>
<tr>
<td>2007</td>
<td>41.2</td>
</tr>
<tr>
<td>2005</td>
<td>39.5</td>
</tr>
<tr>
<td>2001</td>
<td>46.2</td>
</tr>
<tr>
<td>1998</td>
<td>35.1</td>
</tr>
<tr>
<td>1993</td>
<td>29.7</td>
</tr>
<tr>
<td>1990</td>
<td>24</td>
</tr>
<tr>
<td>1980</td>
<td>8.7</td>
</tr>
</tbody>
</table>

Federal Aviation Administration

NPIAS 2013-2017
September 2012
$42.5 Billion by Type of Project and Airport

By Type of Project

- 63% of projects are to rehabilitate existing pavement and keep airports up to current standards
- 37% or projects are to accommodate growth in travel

By Type of Airport

- Commercial Service Airports are 16% of airports and 70% of costs
- GA and Relievers make up 84% of airports and 30% of cost

Federal Aviation Administration

NPIAS 2013-2017
September 2012
Development by Project Type
(Six NPIAS Editions, 2001-2013)
Average 5-Year Annual Development per Airport Using New ASSET Categories

<table>
<thead>
<tr>
<th>Category</th>
<th>Average 5-Year Annual Development Per Airport</th>
</tr>
</thead>
<tbody>
<tr>
<td>National</td>
<td>$4,389,162</td>
</tr>
<tr>
<td>Regional</td>
<td>$1,697,442</td>
</tr>
<tr>
<td>Local</td>
<td>$806,626</td>
</tr>
<tr>
<td>Basic</td>
<td>$528,924</td>
</tr>
<tr>
<td>Not Classified</td>
<td>$355,652</td>
</tr>
</tbody>
</table>

Federal Aviation Administration
Summary

- 3,355 public-use airports are estimated to have $42.5 Billion in AIP-eligible development needs between 2013-2017
  - Cost estimates are 19% lower ($9.8B) than the previous report
  - Short term drop that reflects the economic conditions. As aviation demand rebounds, we expect the development will rebound as well.

- Airport system is in a state of good repair and remains safe

- Airports continue to work on environmental issues and promote sustainable airport development

- Airports and Federal Government continue preparing for future demand by improving infrastructure and implementing NextGen

- Airports provide 98% of population with access to air transportation

- Airports remain in stable financial condition
Summary: Chapters 2 and 3
NPIAS Report 2013-2017
System Performance: Safety and Environment

• Safety – Aviation system remains one of safest in world.
  → AIP used to fund development that maintain safe airport conditions:
    o Runway Safety Areas
    o Wildlife Hazard Assessments and Management Plans
    o Safety Management System Pilot Studies

• Environment – Continuing improvement.
  → Noise – continuing progress through voluntary program (Part 150)
  → Air Quality – reducing local emissions through Voluntary Airport Low Emission (VALE) Program at commercial service airports
  → Water Quality – working with industry to address water quality issues
  → Airport Sustainability – working with industry to promote sustainable airport development
System Performance: Capacity

• Capacity

→ Number of airports with more than 10 minutes of delay per arrival decreased from 25 in 2007 to 10 in 2011.

→ Number of airports with more than 12 minutes of delay per departure decreased from 25 in 2007 to 18 in 2011

→ Alternative Capacity Enhancement Measures
  o NextGen
    • Navigation and Access
    • Surface Surveillance and Departure Queue Management
    • Closed Spaced Parallel Runway Operations
  o Congestion Management (New York, Chicago, San Francisco)
System Performance: Access, Pavement, & Financial

• Surface Accessibility – Good.
  → 98% of population live within 20 miles of a NPIAS airport
  → Private automobile still primary mode of ground access
  → 35% of commercial service airports served by public transportation
  → 27 busy airports served by rail and plans for rail to serve 4 more airports

• Runway Pavement – Adequate and safe.
  → 97.5% of runways at NPIAS airports in excellent/good/fair condition

• Financial Status – Airports are stable.
  → Carefully managing expenses (operating, financing, and capital)
  → Expenses increased 44% and revenue increased 35%. Airports in every category seeking ways to increase nonaeronautical revenues.
  → Creditworthiness for large and medium hub airports remains strong
Aviation Forecast

• Growth in air travel will be moderate in near-term. Return to growth over the long-term.

• Carriers will continue to drive down costs by matching flight frequencies and aircraft size with demand, delay delivery of new aircraft and/or ground older aircraft.

• Load factors expected to remain at historic high levels

• General Aviation Aircraft deliveries down in 2011 and GA activity fell 2.3% in 2011
For Further Information, view the full Report online at:

http://www.faa.gov/airports/planning_capacity/npias/

NPIAS Report Point of Contact:
Sharon Glasgow
202-267-8739
sharon.glasgow@faa.gov