



Asheville Regional Airport

A year-end review & looking forward.



Today, we'll talk about...

- **QUICK FACTS:** Brief overview of Asheville Regional Airport
- **Economic importance**
 - National perspective: the airport industry
 - AVL's regional economic impact
- **2012 Review & Futurecast**



Brief Overview

Asheville Regional Airport



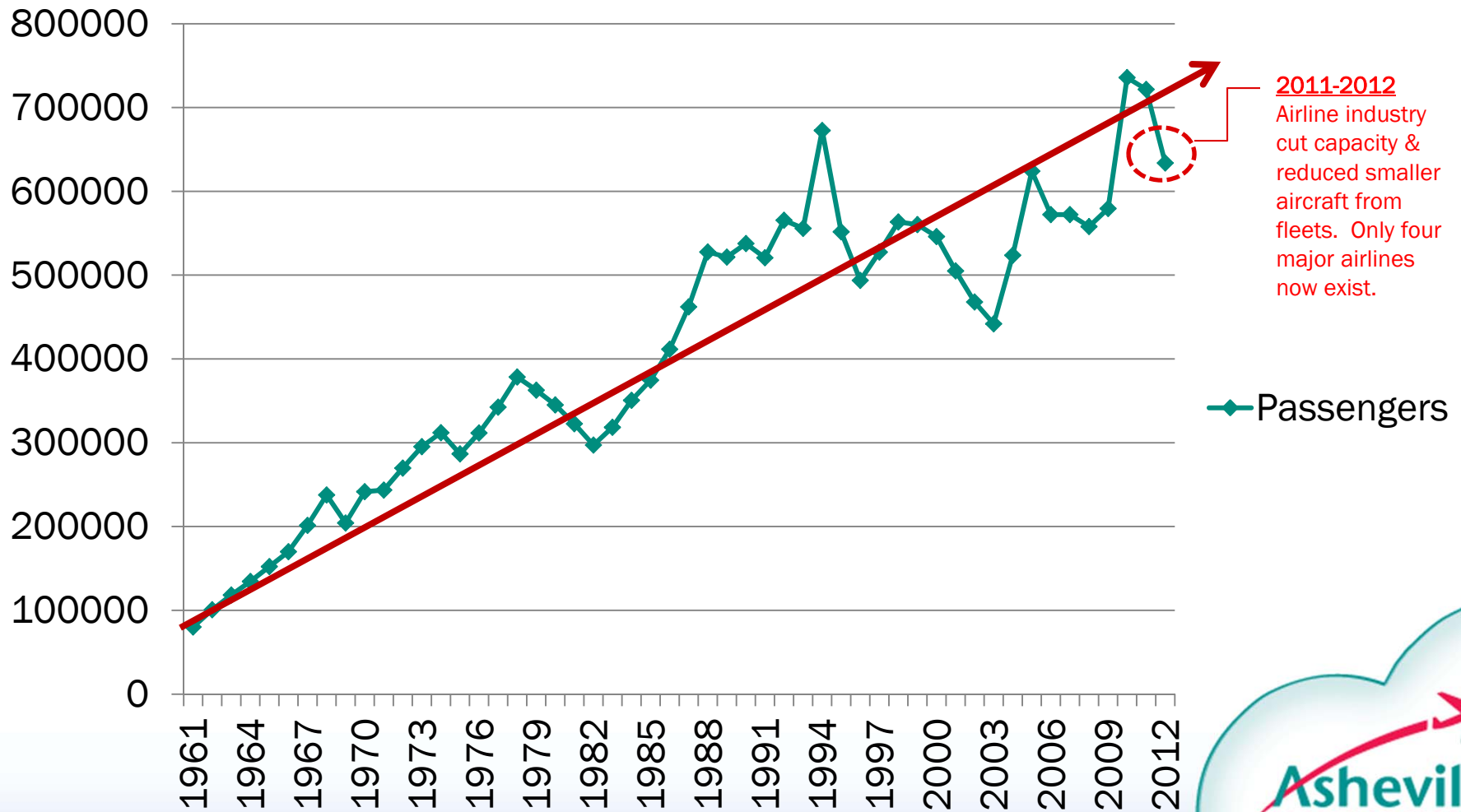
Quick facts

- 8,001' runway
- Served by Allegiant Air, Delta, United and US Airways
- Approximately 24 flights/day
- 8 Nonstop destinations
(9th begins June 6th)



Long-term history shows growth in air service & utilization with peaks & valleys.

Passengers - Calendar Year



2011-2012
Airline industry cut capacity & reduced smaller aircraft from fleets. Only four major airlines now exist.

◆ Passengers



The importance of airports – an economic perspective.

A national perspective, and the “AVL” story.



First – a short video.



Airports – A Vital Transportation System



10,500

Global destinations are connected to US airports—and it would take 28 years to visit them all.



730 MILLION

Passengers travel through America's airports yearly.

That is 2 million every day!



65 TRILLION

Tons of cargo are loaded at American airports yearly.

“Airports Inc.” – Millions of Jobs, Billions in Payroll

1.3 MILLION

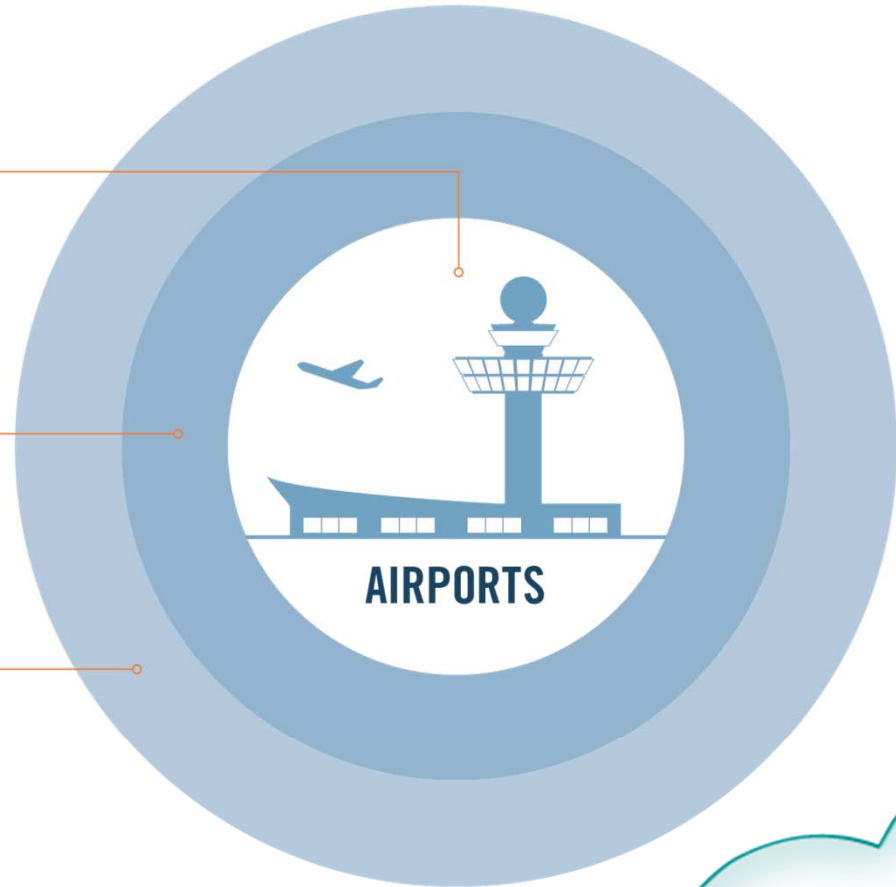
people work at airports and airports support a total of 10.5 million jobs

\$365 BILLION

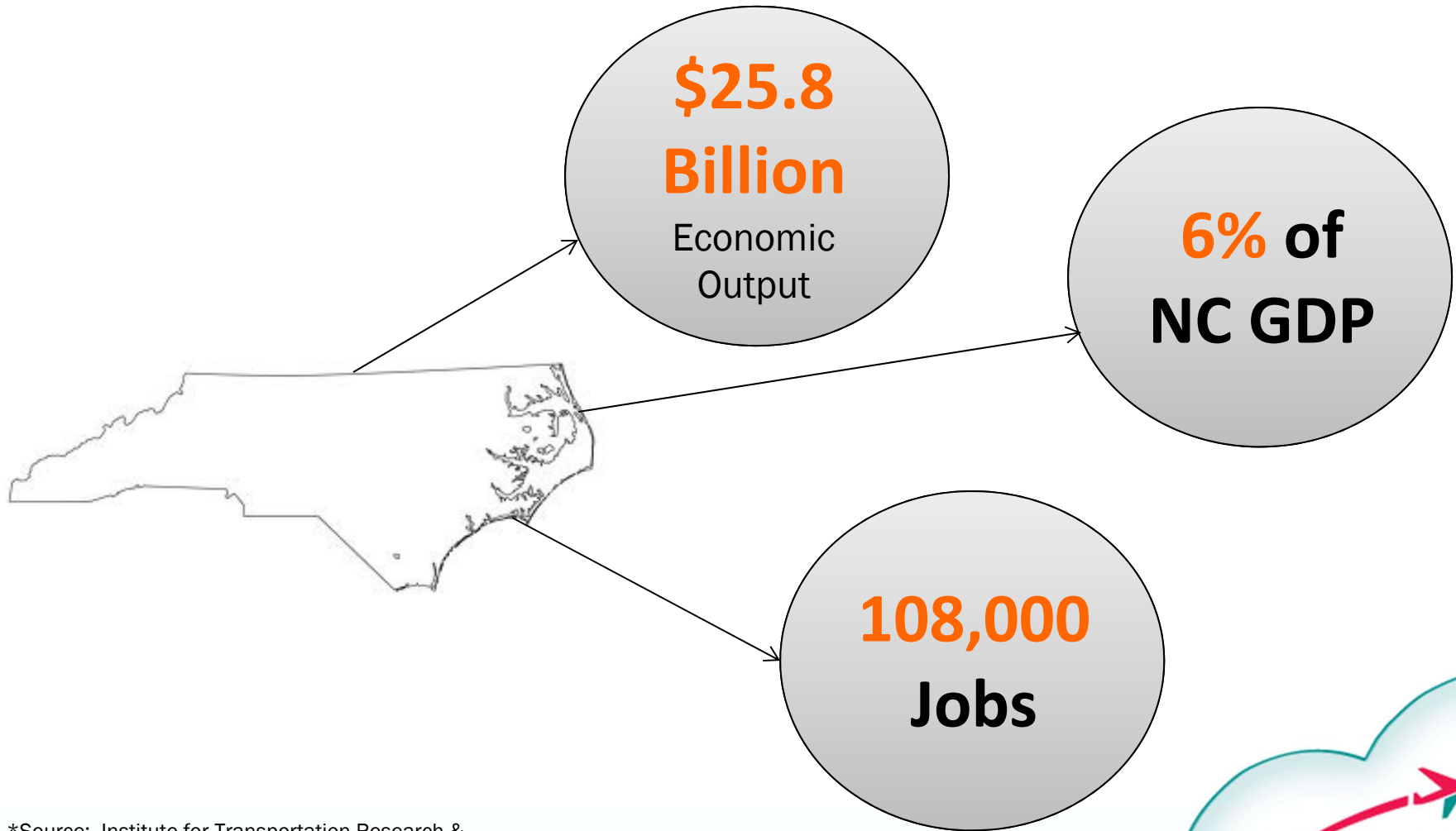
annual payroll created by airports

\$1.2 TRILLION

total airport output is 8% of GDP

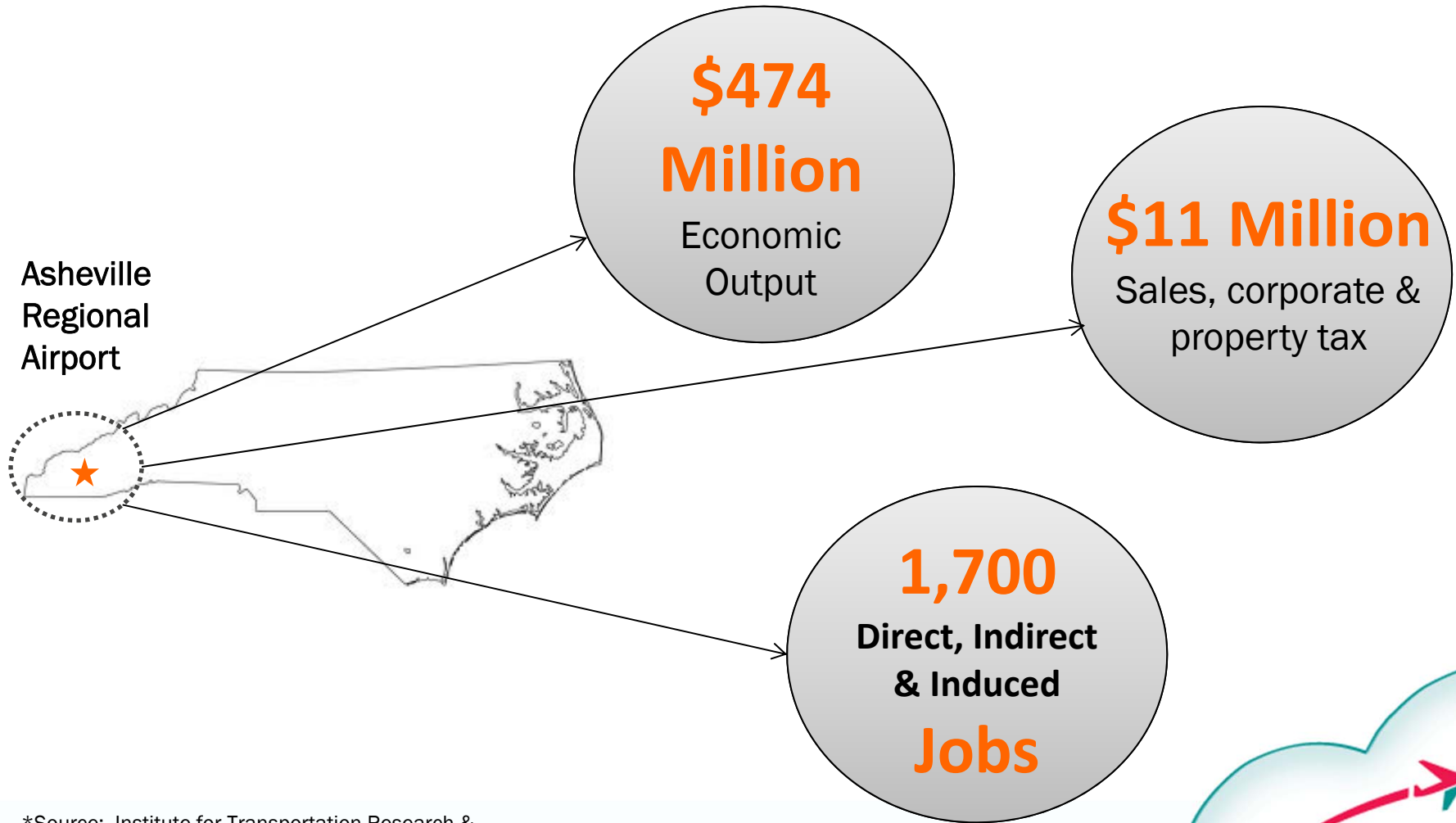


“Airports Inc.” — The North Carolina Story



*Source: Institute for Transportation Research & Education / NC State University 2012

“Airports Inc.” – The WNC / AVL Story



*Source: Institute for Transportation Research & Education / NC State University 2012



AVL By the Numbers



Every 50-seat round-trip flight at 70% capacity generates

\$43,000

of local economic impact, including tax revenue

*Source: Syneva Economics /
Economic Impact Study December 2011





A year in review: 2012

Growth.
Community Involvement.
Our stats.



Our growth in 2012

➤ Development

- Jet bridges



Our growth in 2012

➤ Development

- New public safety facility design & new ARFF vehicle



Our growth in 2012

➤ Development

- West-side fill project



Our growth in 2012

- Longer-term planning & development
Updated Airport Master Plan

The screenshot displays the Asheville Regional Airport website's 'Project Overview' page. The page includes a navigation menu with links for HOME, PROJECT OVERVIEW, FAQ, GLOSSARY, STUDY REPORTS, FEEDBACK/QUESTIONS, and GALLERY. The main content area is titled 'PROJECT OVERVIEW' and contains the following elements:

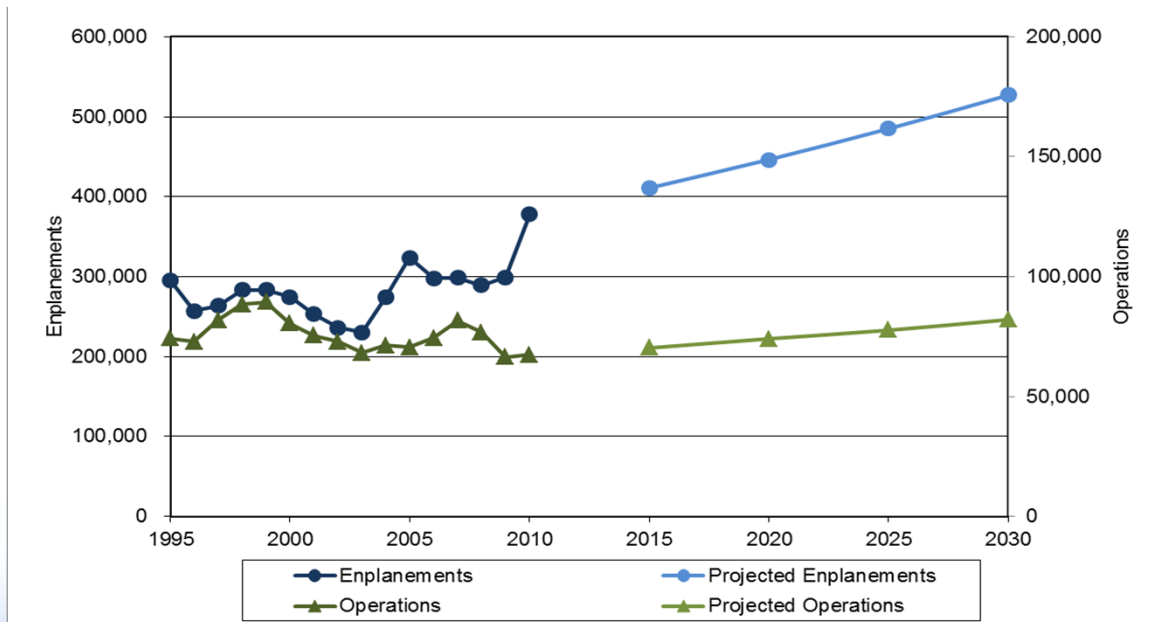
- Project Overview Text:** "The Master Plan study will provide an airfield development plan based on short (1-5 years), intermediate (6-10 years), and long-term (11-20 years) demand levels. Final results of the study may also recommend development considerations that extend far beyond the 20 year planning period." An aerial photograph of the airport is included.
- Master Planning Process Flowchart:**

```
graph TD; A[Pre Planning] --> B[Public Involvement]; B --> C[Aviation Forecasts]; C --> D[Inventory of Existing Conditions]; D --> E[Facility Requirements]; E --> F[Alternatives Development & Evaluation]; F --> G[Environmental Considerations]; G --> H[Financial Feasibility Analysis]; H --> I[Airport Layout Plan];
```
- Frequently Asked Questions:** A section titled 'FREQUENTLY ASKED QUESTIONS' with a sub-section for 'General Questions' containing various questions about the planning process, such as 'How does the airport planning process work?' and 'What is an Airport Master Plan?'.
- LET US ASSIST YOU:** A button at the bottom of the page.

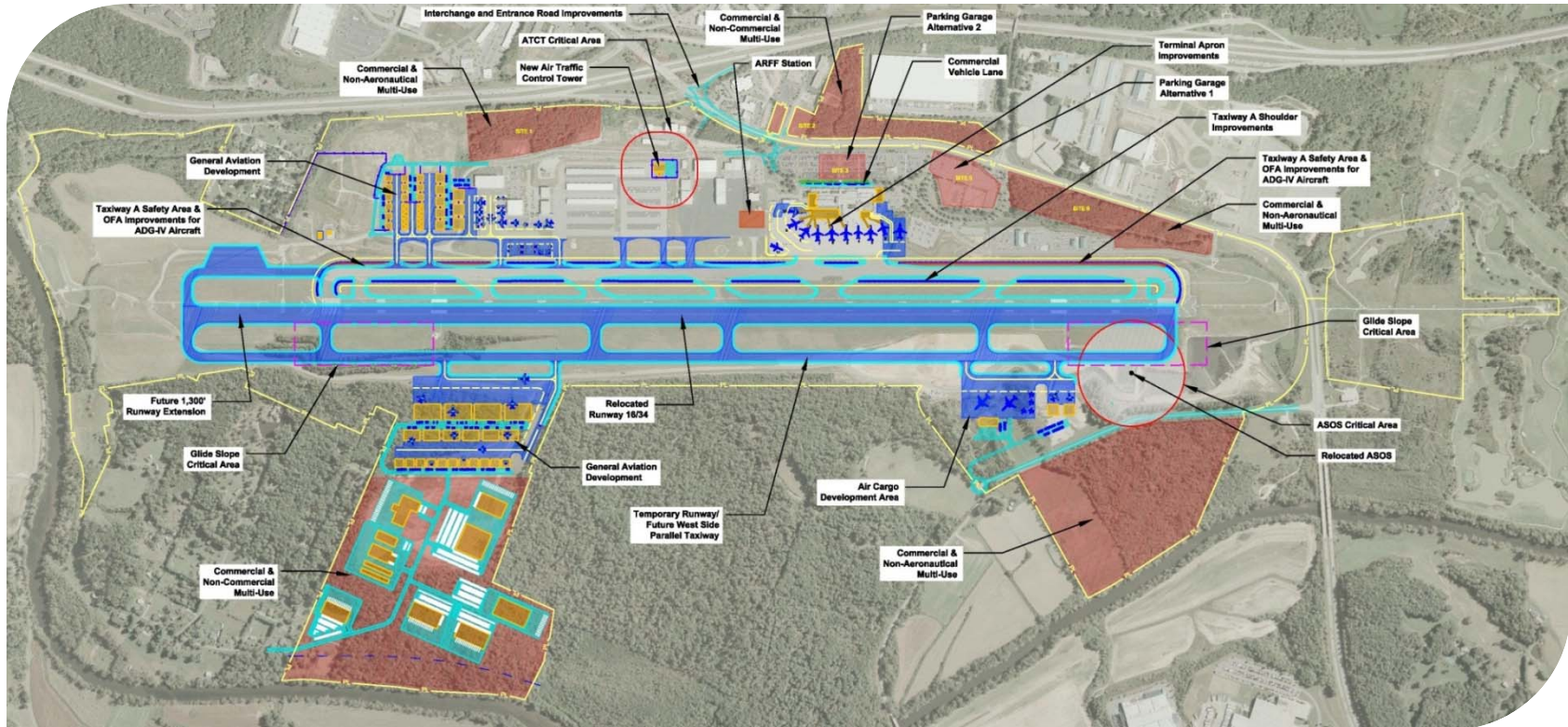
Our growth in 2012

Forecast summary

Year	Enplanements	Operations			Total	Total Freight	Based Aircraft
		Commercial Air Carrier	General Aviation	Military			
Historical							
2008	289,215	20,376	52,912	3,552	76,840	146,886	141
2009	298,865	17,597	45,125	3,715	66,437	133,768	160
2010	378,087	20,765	41,752	4,823	67,340	127,943	174
Projected							
2015	410,793	20,922	45,306	4,028	70,255	158,250	184
2020	446,328	21,780	48,285	4,028	74,093	178,087	195
2025	484,937	22,074	51,547	4,028	77,648	199,453	206
2030	526,886	22,922	55,097	4,028	82,047	221,680	217
<i>CAGR (2010-2030)</i>	<i>1.67%</i>	<i>0.50%</i>	<i>1.40%</i>	<i>-0.90%</i>	<i>0.99%</i>	<i>2.79%</i>	<i>1.11%</i>

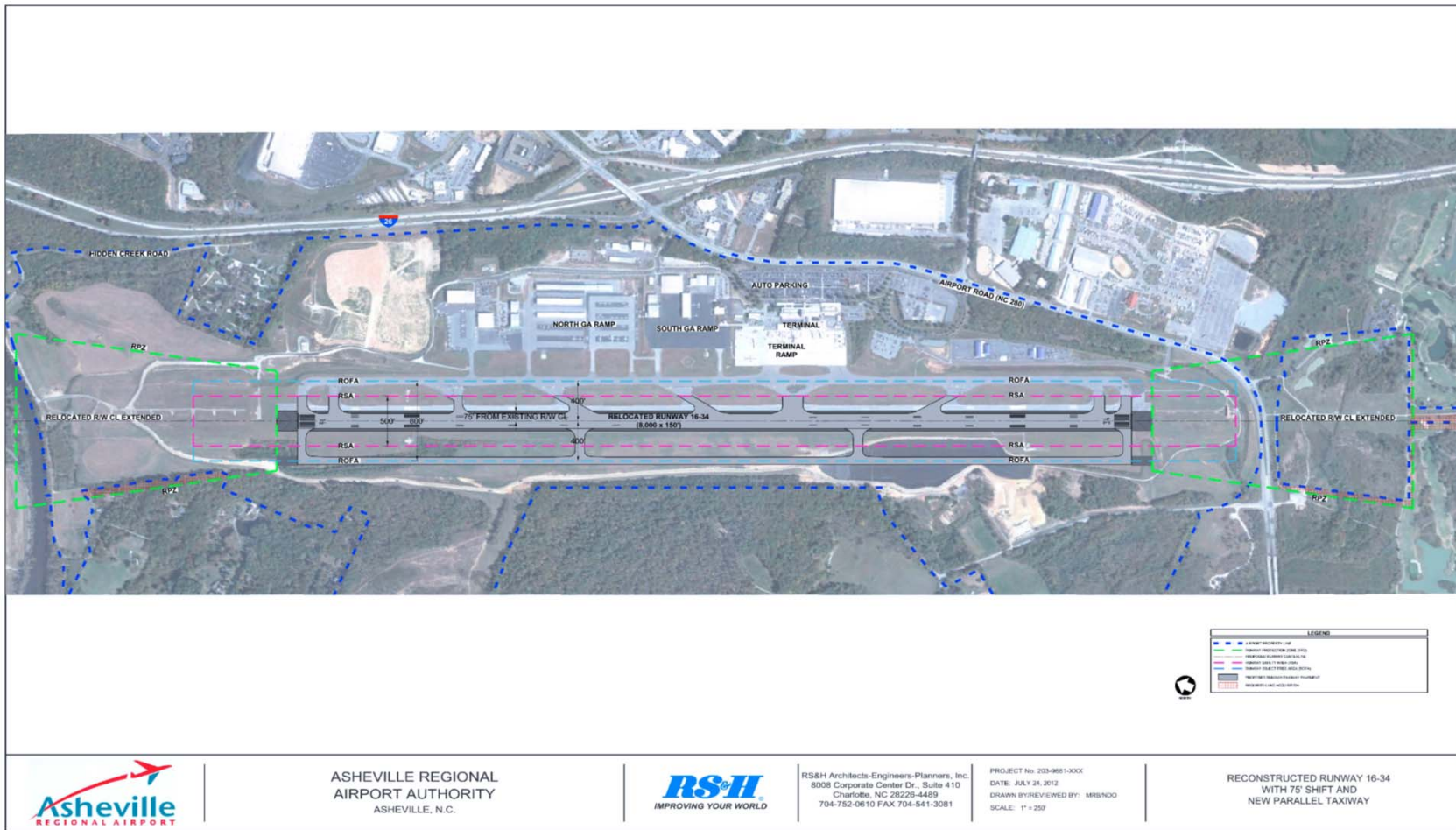


Our growth in 2012 – Recommended Development Plan



Our growth in 2012

Approval from FAA for airfield redevelopment project



Our growth in 2012

➤ Air Service

- While the overall air service offerings contracted nationally for small airports, AVL welcomed a new low-cost route to Fort Lauderdale.
- Small Community Air Service Development grant recipient to attract non-stop to Denver.
- Mainline Delta service



A new Independent Airport Authority

- State sanctioned, as of June 28, 2012
- Allows more efficient operation
- Provides for more regional representation
- In final transition to the new structure



A few more highlights from 2012

- Crisis training
- Employee wellness
- Community Involvement



2012 Stats

➤ Enplanements	356,098
➤ Total net assets	\$78 million
➤ GARAA employees	56
➤ Sources of Revenue	
— Airlines	24%
— Concessions	3%
— FBO/General Aviation	11%
— Federal Government (FAA)	4%
— Parking	30%
— Rental Cars	23%
— Other	5%



What's next?

A look to the future



A changing industry

National trends affecting regional airports and AVL:

- Airline trends
- Washington, D.C.
- The economy



And last ... some food for thought.

A mile of pavement can take you a mile down the road.

A mile of RUNWAY can take you anywhere in the world ... or bring the world to Western North Carolina.





Questions?

