

Delaware Continuous Statewide Aviation Planning

Delaware Air Service Feasibility Analysis

WILMAPCO Presentation
July 9, 2009



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Department of Transportation
Carolann Wicks, Secretary



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Delaware Aviation System Plan Update

Presentation Outline

- Inventory/Definition of Service Areas
- Estimation of Potential Demand
- Preliminary Feasibility Analysis
- Summary and Findings

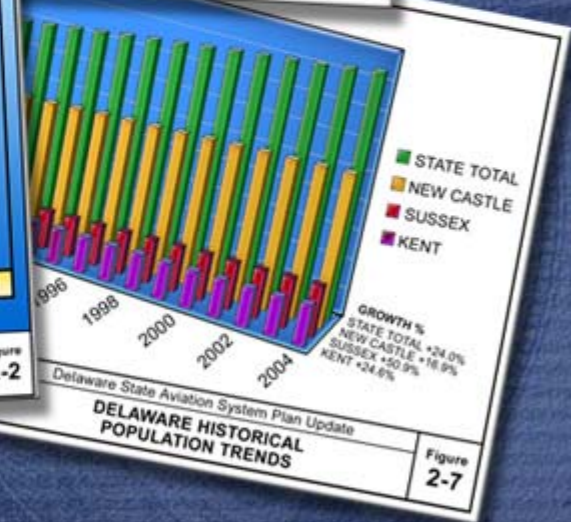
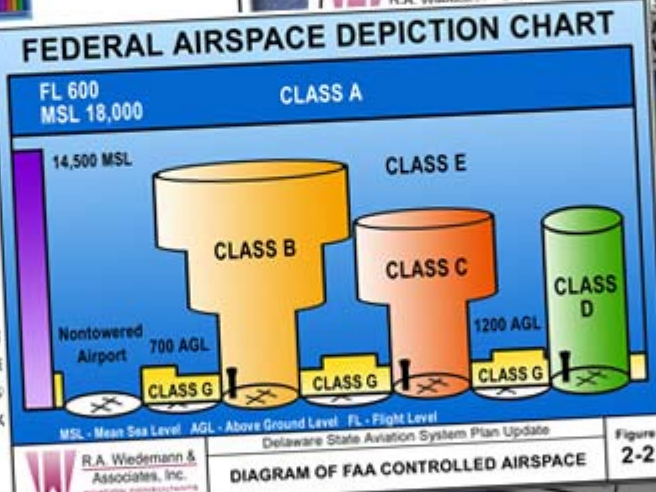
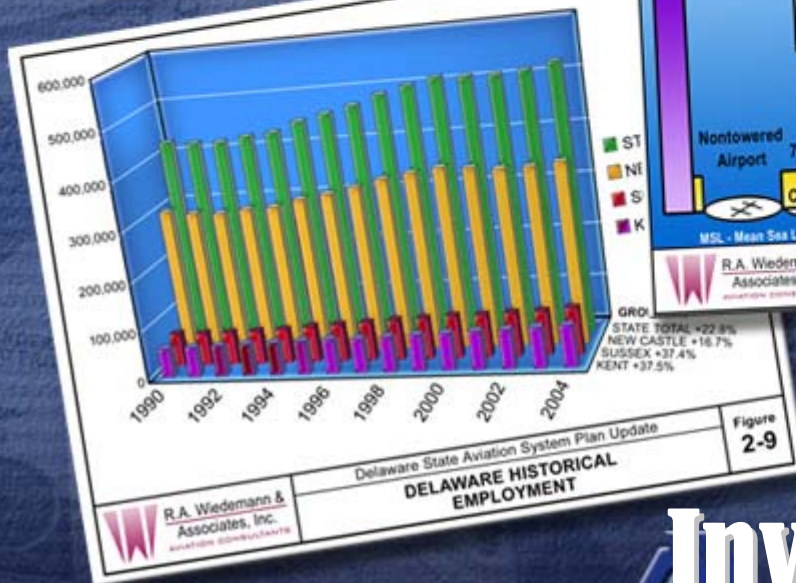
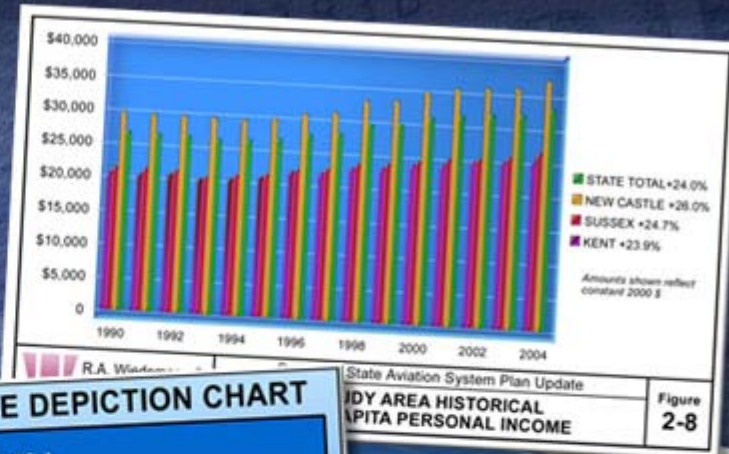
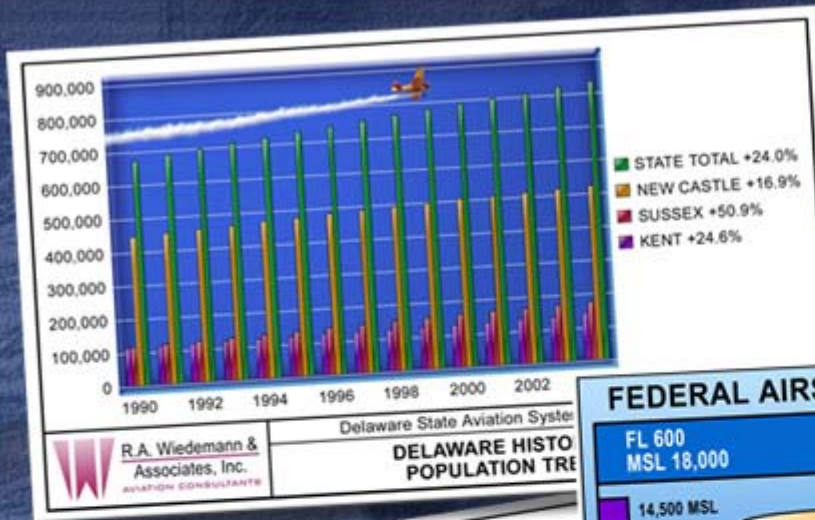


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Inventory/Service Areas



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Existing Conditions

- Historical Airline Service in Delaware
- Geographic Definition of Primary Service Areas
- Demographic Characteristics




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Historical Service - ILG

- 
- Shuttle America
 - Buffalo & Hartford
 - 1999-2000
 - Delta
 - Atlanta
 - 2006-2007
 - Skybus
 - Columbus (OH), Greensboro (NC)
 - 2008



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Geographic Definition of Service Area

- Wilmington
- Dover
- Georgetown/Sussex County

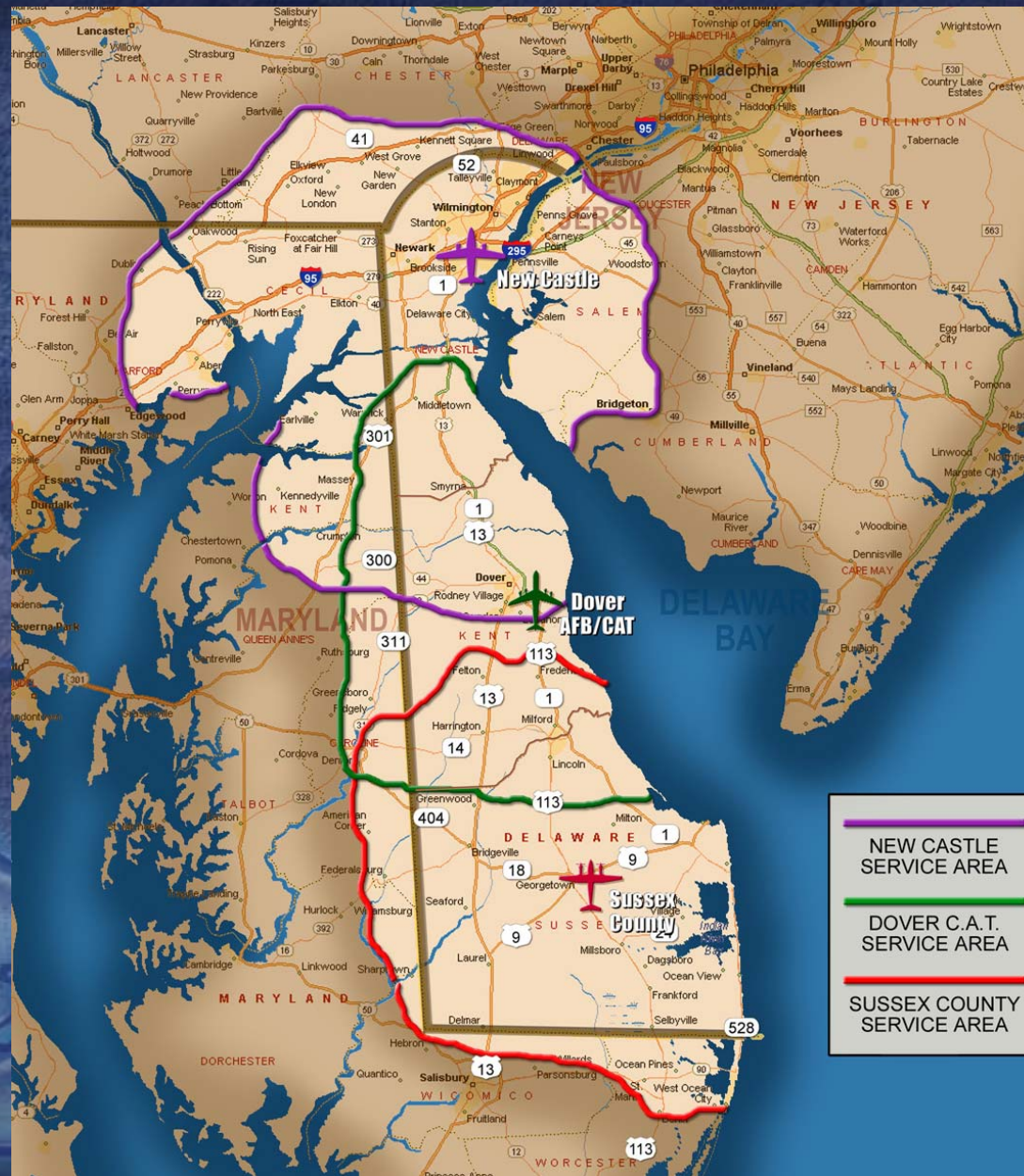


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Drive Times from Service Areas

Service Area	BWI		Philadelphia Intl		Salisbury	
	Miles	Time	Miles	Time	Miles	Time
Wilmington	80	1:29	25	0:32	110	2:23
Dover	90	1:48	70	1:17	60	1:24
Georgetown	100	1:58	105	1:55	30	0:49



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Service Area Demographics

Service Area	Population	Employment	PCPI
Wilmington	526,400	360,900	\$45,755
Dover	151,700	87,500	\$29,578
Georgetown	180,000	99,800	\$32,647



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Estimation of Potential Demand



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Comparative Model

- 93 Database Airports
- Enplanements
- Population of Service Area
- Proximity to Larger Airports
- Level of Airline Service
 - Large Jet
 - RJ
 - Turboprop
 - 19-Seat Only



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Demand Estimates (Enplanements/Year)

Service Area	19-seat	Turboprop	RJ	Large Jet
Wilmington	600	0	0	638,600
Dover	9,500	12,200	68,400	241,700
Georgetown	5,100	0	31,200	249,300



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Preliminary Feasibility Analysis



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Preliminary Feasibility Analysis

- Airline Service Niches in Delaware
- Financial Requirements for Feasibility
- Air Service Policy Issues



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Application of Service Niche

- **Wilmington**

- Too Close to PHL to support commuter or RJ stand-alone Service
- Could support large jet service because of demographics
- Service model would have to include low fare operator
- Must be considered part of PHL southern service area to attract carrier
- Extension of conventional service from PHL many years away



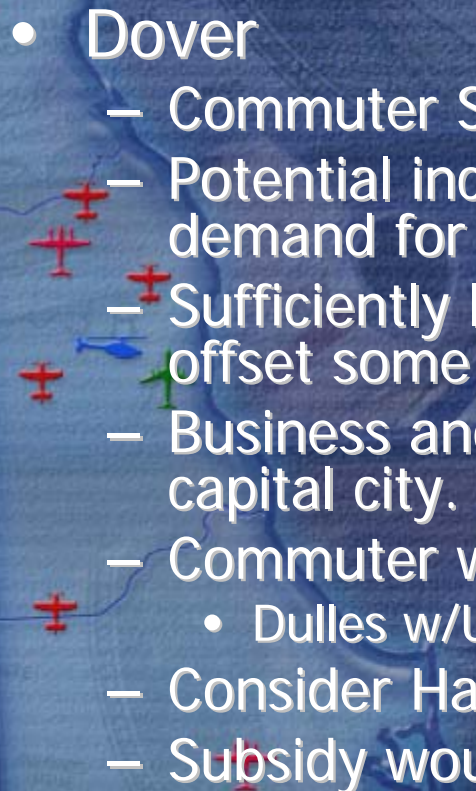
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Application of Service Niche (Cont.)

- 
- Dover
 - Commuter Service Area
 - Potential inclusion of a portion of Dover AFB travel demand for the service.
 - Sufficiently long driving distance from PHL and BWI to offset some competition with automobiles.
 - Business and political activities associated with the State's capital city.
 - Commuter would need code share
 - Dulles w/United?
 - Consider Hagerstown, MD - Cape Air and Allegiant
 - Subsidy would be needed for commuter service



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Application of Service Niche (Cont.)

- Georgetown/Sussex County
 - No FAR Part 139 Airport
 - 5,000' Runway Length Limitation
 - Low Commuter Service Demand (5,100/yr)



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Financial Requirements for Feasibility

- Sampling of 10 EAS Cities
 - \$2.5 Million/City average
 - \$336/Ticket average
 - 7,300 Average enplanements
- 10 Self supporting cities under 50,000
 - No Subsidy
 - 34,000 average enplanements
- Feasibility Requirements Conclusion
 - Minimum Passengers:
 - 10,000 to 34,000



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Summary & Findings



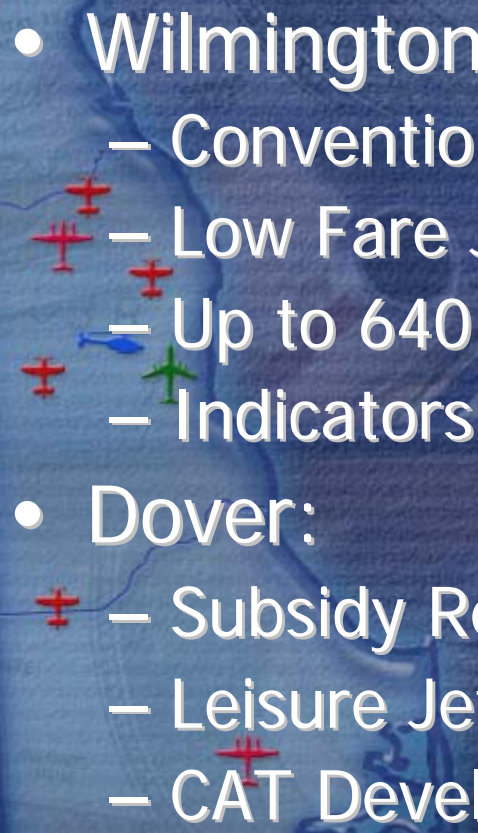
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Summary and Findings

- 
- **Wilmington:**
 - Conventional Jet Service - Post 2012 Period
 - Low Fare Jet Service - Immediate Feasibility
 - Up to 640,000 Enplanement Demand
 - Indicators - PHL Capacity and Delay
 - **Dover:**
 - Subsidy Required for Commuter Connection
 - Leisure Jet Service (to FL) - No Subsidy
 - CAT Development Needed (Terminal, etc.)



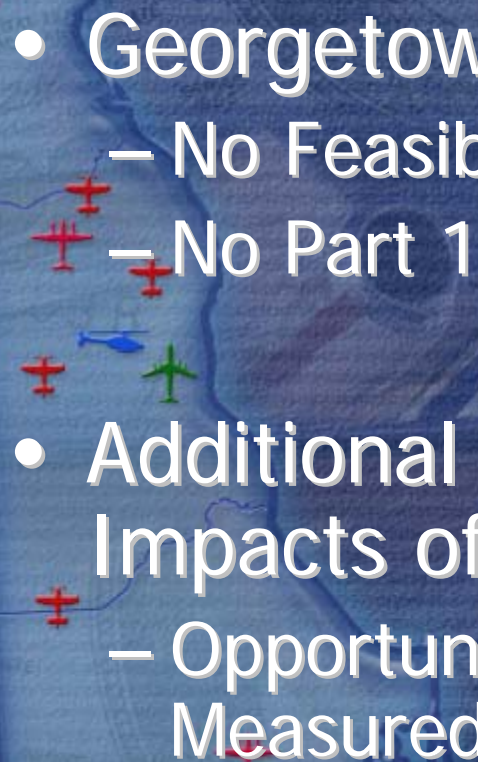
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Summary & Findings

- 
- A map of the state of Delaware is shown on the left side of the slide. It is overlaid with several airplane icons: a purple one in the north, several red ones along the western and southern coasts, and a few green and blue ones in the central region.
- Georgetown/Sussex County
 - No Feasibility at this time
 - No Part 139 Airport
 - Additional Work Needed to Quantify \$ Impacts of No Airline Service in Delaware
 - Opportunity Costs to Businesses Must be Measured



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Policy Considerations

- 
- A map of the state of Delaware is shown on the left side of the slide. It is overlaid with several airplane icons: a purple one in the northwest, a red one in the northeast, a red one in the west, a red one in the south, and a red one in the southwest. There are also a few smaller red and green icons scattered across the map.
- Long Term Strategies
 - GAO Study
 - Future Capacity Shortfalls at PHL
 - eharmony.com Approach
 - No Entitlement to Air Service



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Questions? Comments



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