2035 Long-Term Comprehensive Plan

19 June 2015

City of Saint Paul Planning Commission Briefing

Briefing Agenda

- LTCP Purpose & Background
- Planning Process
  - Aviation Activity Forecast
  - Facility Requirements Analysis
  - Development Alternatives
- Timeline

MSP – 2014 Aerial Photo

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LTCP Purpose

- Purpose
  - Update view of future facility needs
  - Serve as the "road map" to guide our development strategy and shape our 7-Year Capital Improvement Program
  - Assesses when facility improvements are needed

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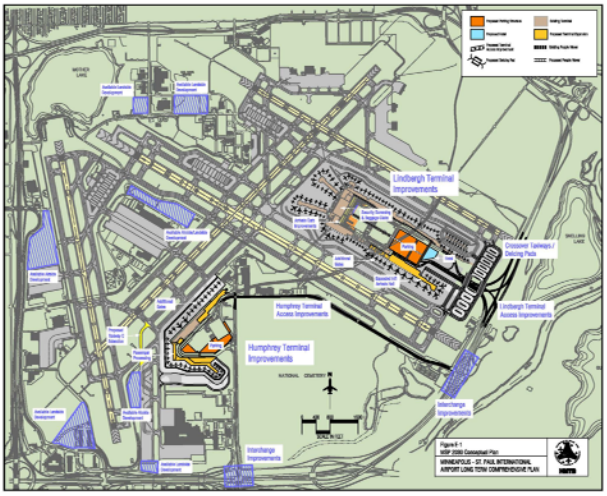
2010 LTCP Recommendation



- 2030 Planning Horizon
  - Existing facilities require expansion
  - Balance passenger demand between Terminal 1 Lindbergh and Terminal 2 Humphrey Terminals
  - Relocate non-Delta carriers
- Follow-on Environmental Assessment (EA)

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2035 LTCP Areas of Emphasis

- Focus Areas:
  - Aircraft Gates
  - Terminal Processors
  - Concourse Sizing
  - Public Parking
  - Departures & Arrivals Curbs

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2035 LTCP Goals & Objectives

Goal #1:

Plan for future facilities that will maintain and enhance the customer service experience while promoting operational efficiency and flexibility throughout the entire MSP campus.

Goal #2:

Produce a plan that promotes fiscal viability, incorporates environmental stewardship, and infuses sustainable thinking – while at the same time enhancing the Airport's competitive position in the marketplace.

Goal #3:

Through the planning process, expand effectiveness through strengthened external relationships and partnerships with customers, tenants, neighboring communities, and governmental agencies.

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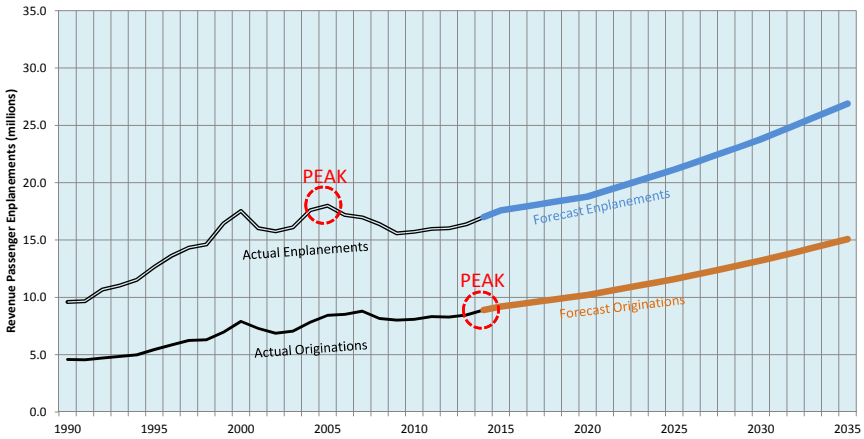
AVIATION ACTIVITY FORECAST

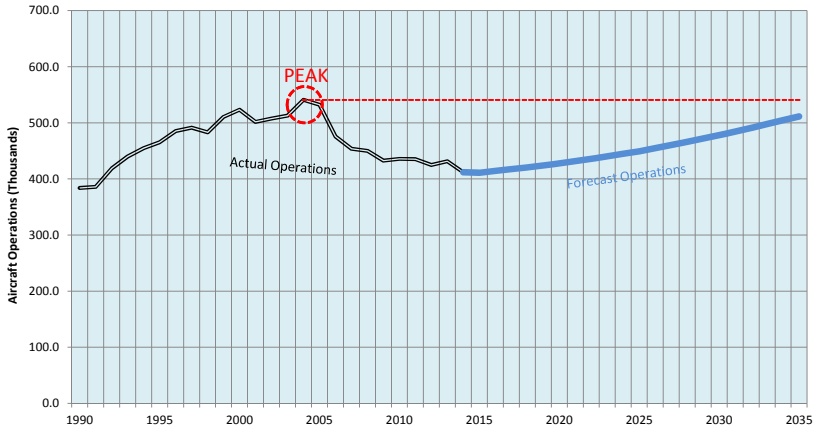
2035 LTCP Passenger Forecast (2015 – 2035)



- Originations
  - ~9m in 2014
  - ~15m by 2035
  - 2.5% AAG 2014-2035
- Enplanements
  - ~17m in 2014
  - ~27m by 2035
  - 2.2% AAG 2014-2035
  - Surpass historical peak before 2020

Source: HNTB Forecast
AAG = Average Annual Growth Rate

2035 LTCP Aircraft Operations Forecast (2015 – 2035)



- 511k operations in 2035
  - 412k in 2014
  - +1.0% AAG 2014-2035
  - 2004 peak not exceeded in forecast period

Source: HNTB Forecast
AAG = Average Annual Growth Rate

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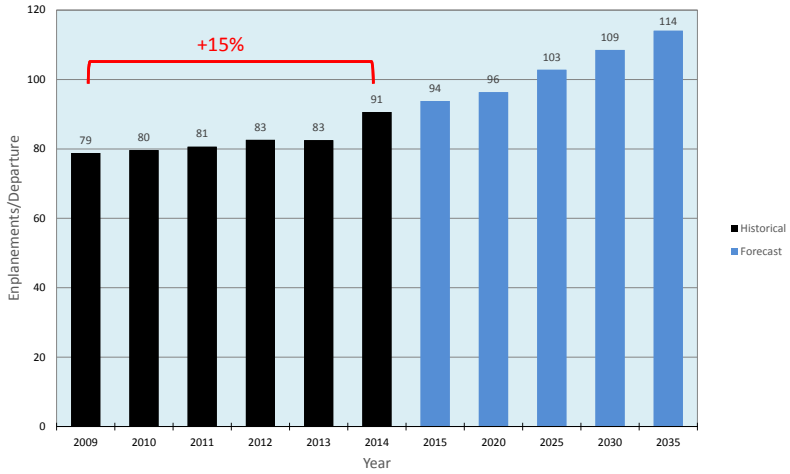
2035 LTCP Forecast Wrap-Up



- Enplanements per Departure
  - 79 in 2009
  - 91 in 2014
  - 114 by 2035
- Key Takeaways
  - Airlines will move more passengers with larger aircraft
  - Projected 2035 aircraft operations do not exceed historical peak
  - Airfield will be adequate through planning horizon

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FACILITY REQUIREMENTS

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LTCP Facility Requirements Analysis

- Facility Requirements
  - Assessing capability of existing facilities to meet projected demand
  - Two Scenarios (Book Ends)
    - Full Airlines Remain
    - Full Airlines Relocate

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Aircraft Gate Requirements

- Existing Supply
  - 106 Gates@ T1
  - 14 Gates @ T2
  - 120 Total Gates
- 2022 Scenario – Existing gate supply largely adequate at both Terminals
- 2035 Full Airlines Remain
  - Terminal 1 – 12 new narrowbody gates
  - Terminal 2 – 5 new narrowbody gates
- 2035 Full Airlines Relocate
  - Terminal 1 – No new gates
  - Terminal 2 – 19 narrowbody gates

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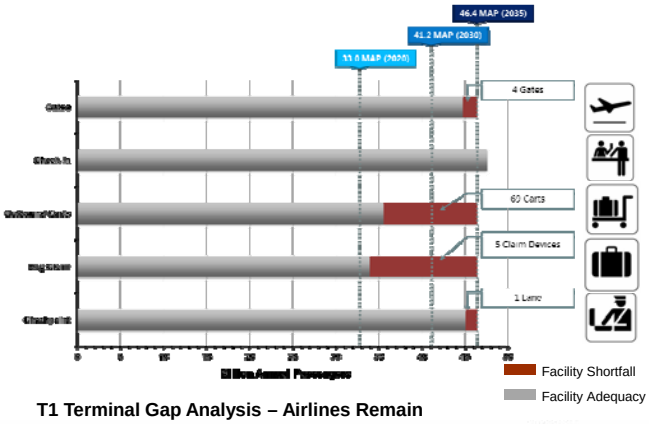
Terminal Requirements Summary

- Full Airlines Remain
  - Processors at both terminals largely adequate through early 2020s
  - Notable shortfalls post-2020:
    - Terminal 1: outbound baggage cart staging, inbound baggage claim, FIS, checkpoint
    - Terminal 2: ticketing positions, inbound baggage claim, FIS
- Full Airlines Relocate
  - Terminal 1 Processors largely adequate through 2035; excess capacity
  - Terminal 2 Processors require significant expansion



T1 Terminal Gap Analysis – Airlines Remain

Source: Ricondo & Associates

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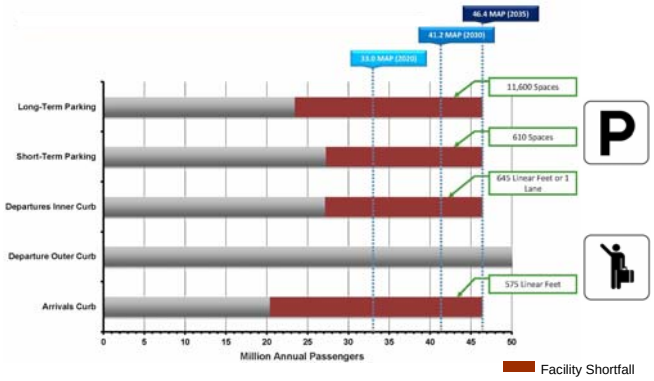
Landside Requirements Summary

- Full Airlines Remain
  - Terminal 1
    - Parking shortfall: 5,000 spaces by 2020; 12,000 spaces by 2035
    - Shortfalls on both departures and arrivals curbs
  - Terminal 2
    - Curb shortfall mid-2020s
- Full Airlines Relocate
  - Terminal 1
    - Parking shortfall mid-2020s
    - Arrival curb shortfall
  - Terminal 2
    - Parking shortfall: 8,500 spaces by 2035
    - Curb shortfall



T1 Landside Gap Analysis – Airlines Remain

Source: Ricondo & Associates

DEVELOPMENT ALTERNATIVES

Development Alternatives

- Determining the practical capacity of the Terminal 1 Complex
  - Balancing airside, terminal, and landside capacity
  - Maintaining level-of-service standards
  - An incremental approach to the Full Airlines Relocate scenario
  - Focus Areas:
    - Gate Concepts
    - T1 Arrivals Curb Concepts

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WORK IN PROGRESS

Airlines Relocate Scenario

Incremental 2035 Phase

T1 Gate Concept

- Concept Elements
  - Phase 1 Parking Expansion with Infield Exit Plaza
  - "Infill" De-Icing Pad
  - 8-gate expansion
    - 5 net new gates
    - 7 gate "overflow" to T2

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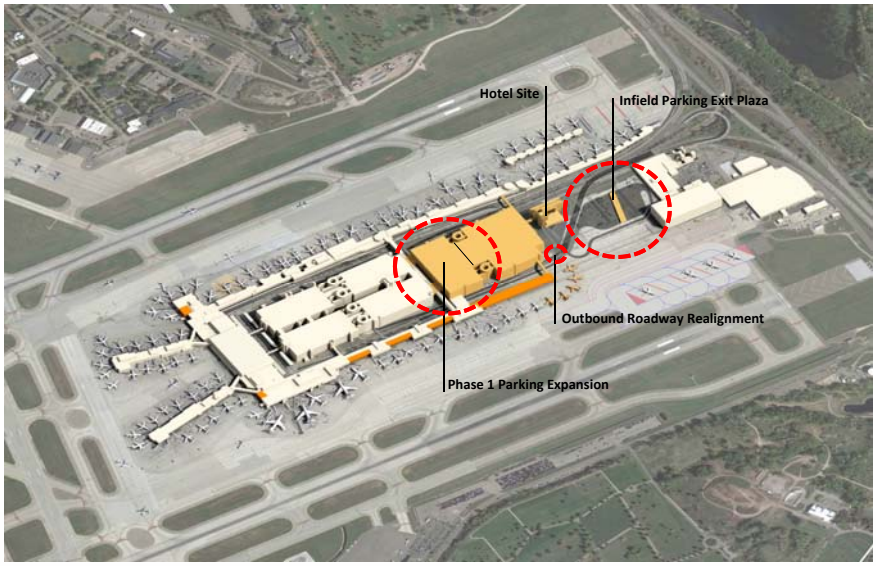

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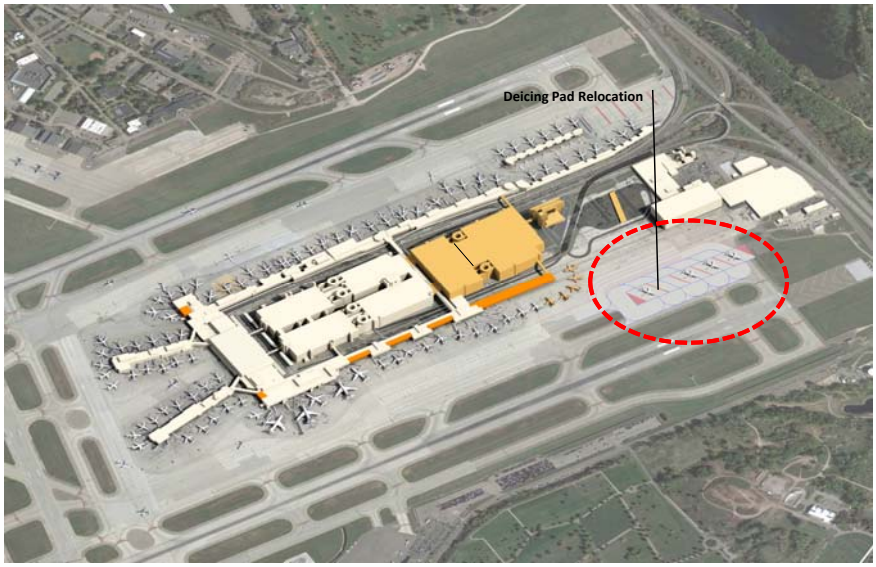

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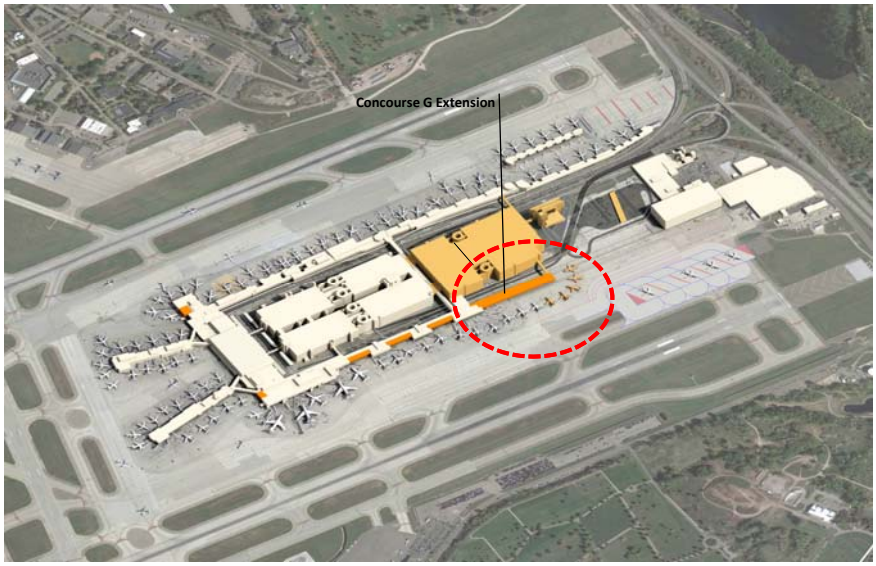

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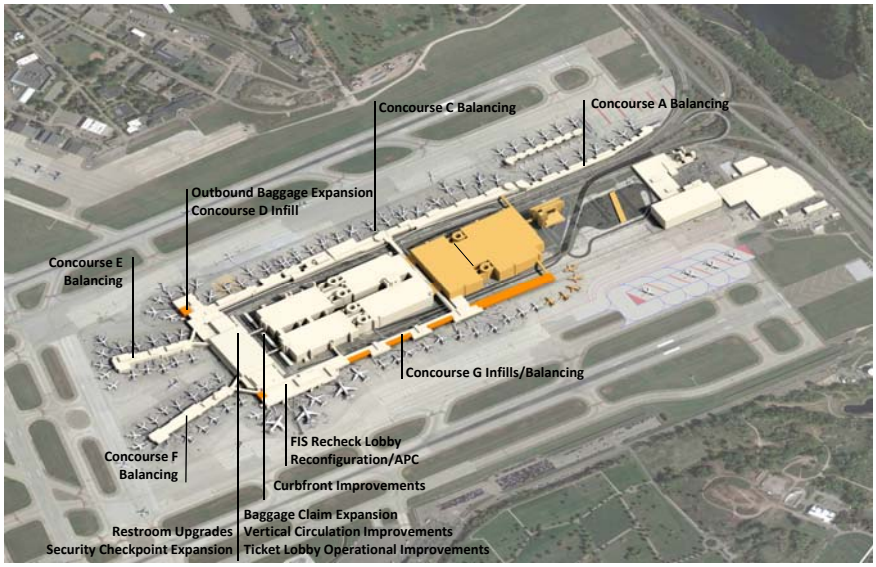

WORK IN PROGRESS

Airlines Relocate Scenario
Incremental 2035 Phase
T1 Processor Improvements

- In 2015-2021 CIP
  - Curbfront Improvements
  - Outbound Baggage
  - Inbound Baggage Claim
  - FIS Improvements
  - Operational Improvements
- Beyond CIP
  - Concourse Infills/Space Rebalancing

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WORK IN PROGRESS

Airlines Relocate Scenario Incremental 2035 Phase

T2 Improvements

- 12 gate expansion
- Terminal Improvements
  - Ticketing
  - Baggage Claim
  - FIS
- Landside Improvements
  - Curb extension/widening
  - Parking expansion
  - Outbound Roadway

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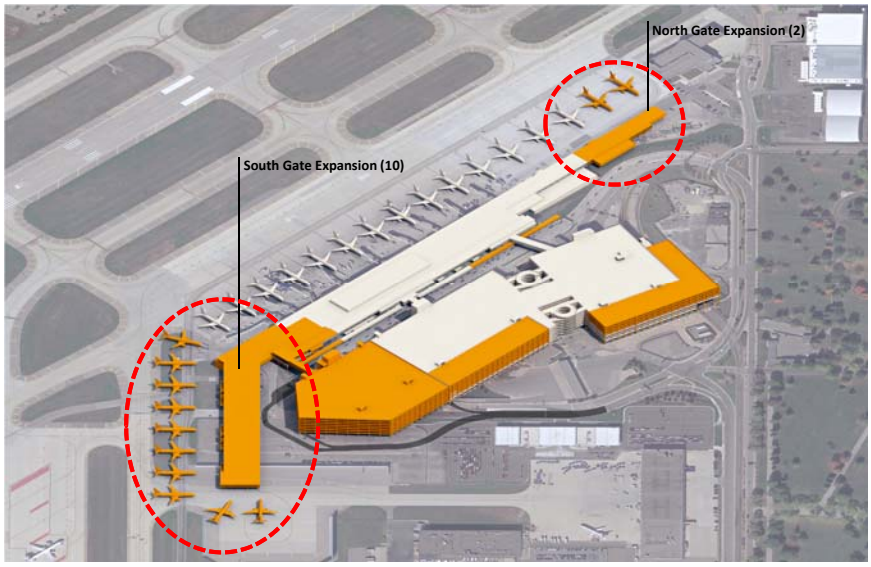

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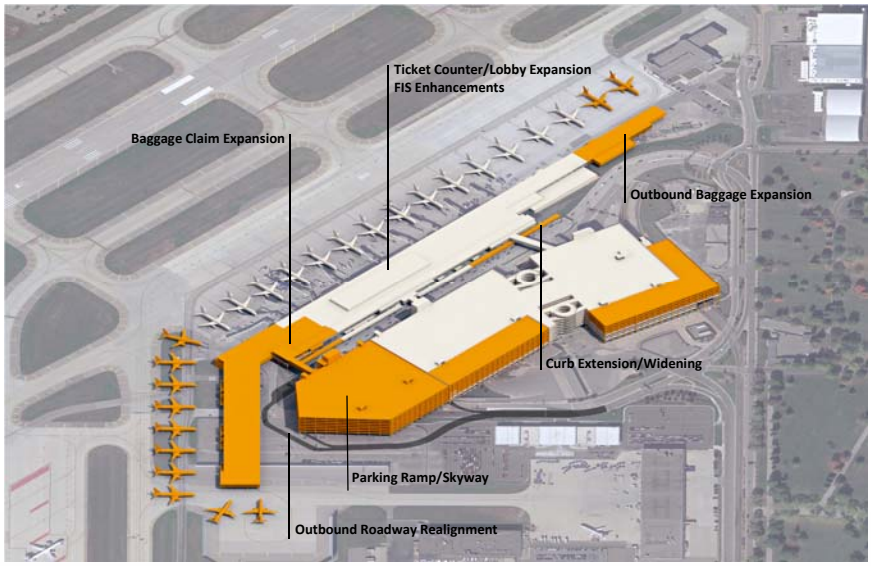

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Airlines Relocate Scenario

Incremental 2035 Phase

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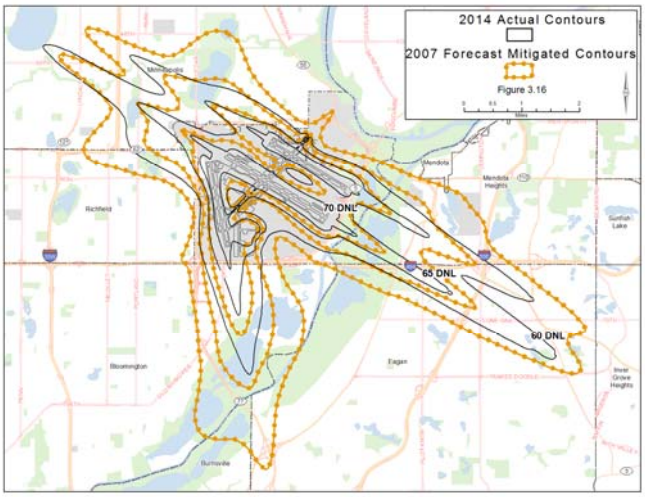
Environmental Considerations



- Noise Contours
  - 2014 Actual Condition (Baseline)
  - 2035 Recommended Development Condition
- Air Quality
- Water Quality
- Climate Adaptation
- Recycling/Reuse/Waste Reduction
- Land Use Compatibility

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LTCP Stakeholder Outreach Strategy

- Pre-Draft Public Information Meeting
- Formal LTCP Public Review
  - Written comment period (45 days)
    - Targeting August – October timeframe
  - Two (2) Public Information Meetings
- LTCP Final Draft/Adoption
  - Additional stakeholder outreach as needed

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LTCP Timeline

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Thank you!

Rental Car Return
Baggage Claim
Ticketing & Baggage Claim
Ticketing / Check-In

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