# Thank you for your participation.

The meeting will begin shortly.

- During this meeting, your camera will be off and your microphone muted.
- The presenters and presentations will be featured on your screens for the duration of the meeting.
- Please submit questions and comments using the Chat function. These will be addressed during the Questions/Comments portion of the agenda.
  - Turn on the "Chat" to submit.

Mute

Camera

Chat
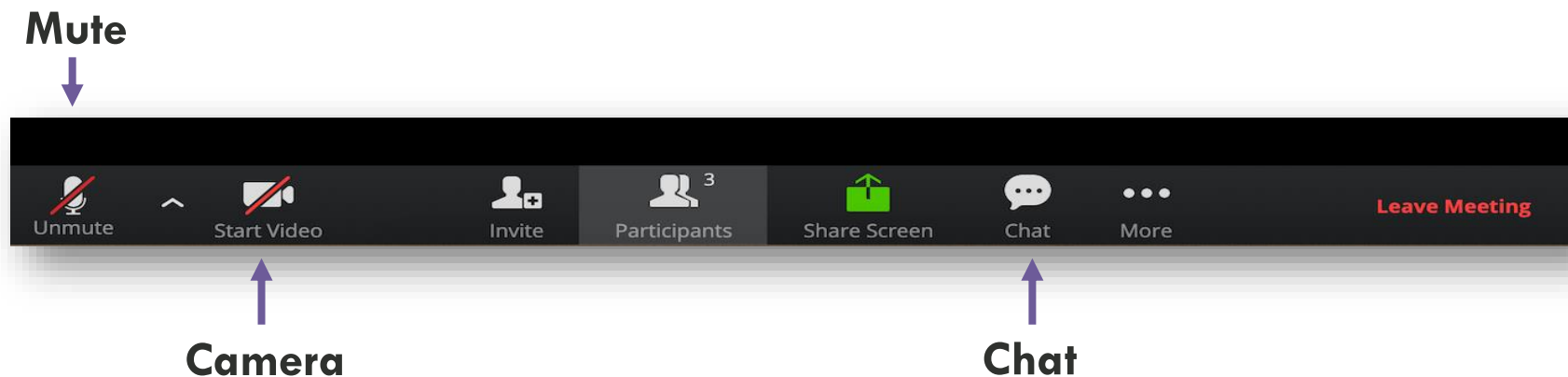
HCAA Project No. 6915 22

HCAA Tampa International Airport Master Plan Update (MPU)

Public Outreach Meeting #3

July 25, 2023

TAMPA INTERNATIONAL AIRPORT

Annual Passengers

23,448,336

(Projected for FY23)

Daily Average **64,242**

Highest Traffic Month

March

2,252,769

Lowest Traffic Month

September

1,336,353

4 Airsides / 58 Gates

66

Shops and Restaurants

23,000

Approx. Parking Spaces

485,892,347

Pounds of Cargo

Calendar Year 2022

3 General Aviation Airports

Peter O. Knight, Plant City, Tampa Executive

Tampa International Airport

TPF Peter O. Knight Airport

Annual Operations
144K

Hangars
335

VDF Tampa Executive Airport

Based Aircraft
357

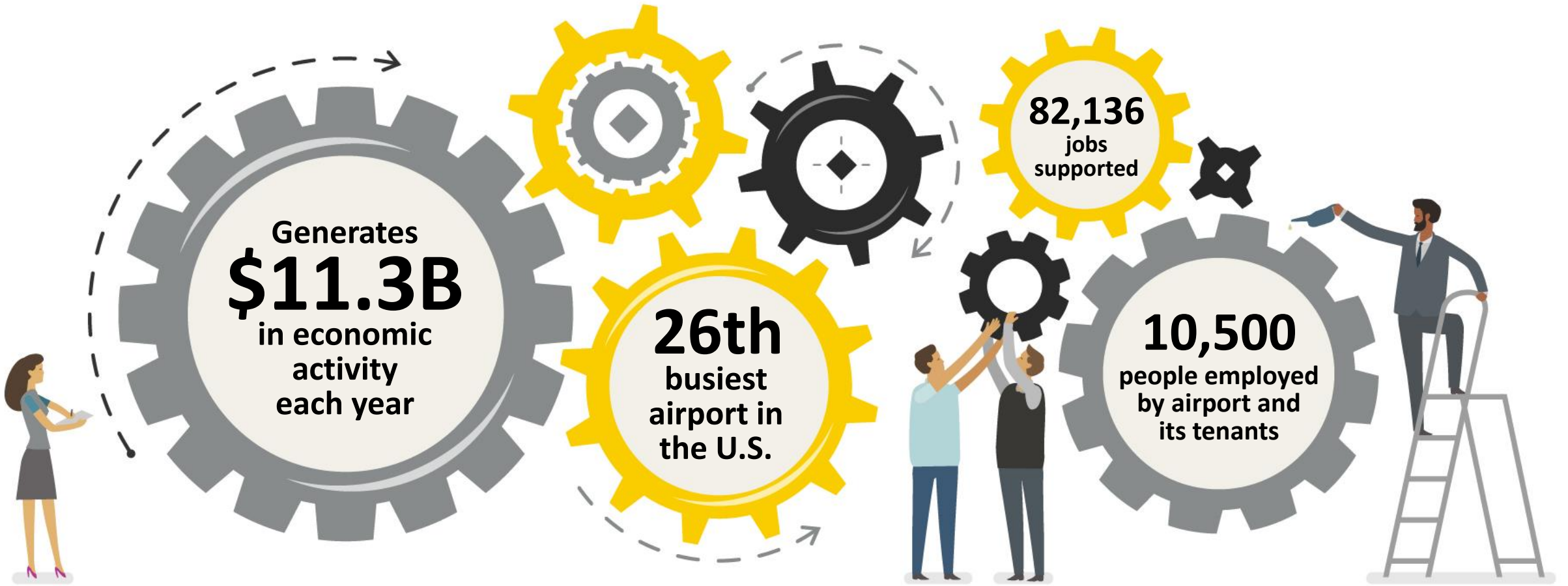**PCM** Plant City Airport

Economic Impact
$563.4M

Tampa International Airport

Generates **$11.3B** in economic activity each year

26th busiest airport in the U.S.

82,136 jobs supported

10,500 people employed by airport and its tenants

*Sources: FDOT Aviation Economic Impact Study 2022; FAA CY22 Enplanement Data

Hillsborough County Aviation Authority

Tampa International Airport

Fundamentals of Our Business

- Unique independent special district
    - Single business purpose government
    - Own, operate all public airports in the County

- Federally regulated
    - Must be self-sustaining
    - Our revenues can only be used at the airport and must be tied to airport purposes; cannot go to other community projects

FY2023 Operating Revenue Budget – Top Drivers

General Aviation, $5.4, 1.6%
Cargo, $7.3, 2.2%
Interest Income, $13.3, 4.0%
Commercial Area Rentals, $16.5, 4.9%
SkyCenter Tenant Rent, $3.5, 1.0%
Other Revenues, $1.2, 0.4%
TSA Revenue & Reimbursements, $0.8, 0.2%

Concessions: $39.7m
11.9%

Rental Cars
$46.4m
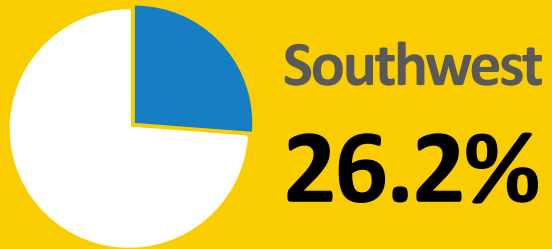13.9%

Airline Revenue *: $111.7m
32.6%

Parking & Ground Transportation
$89.1m
26.6%
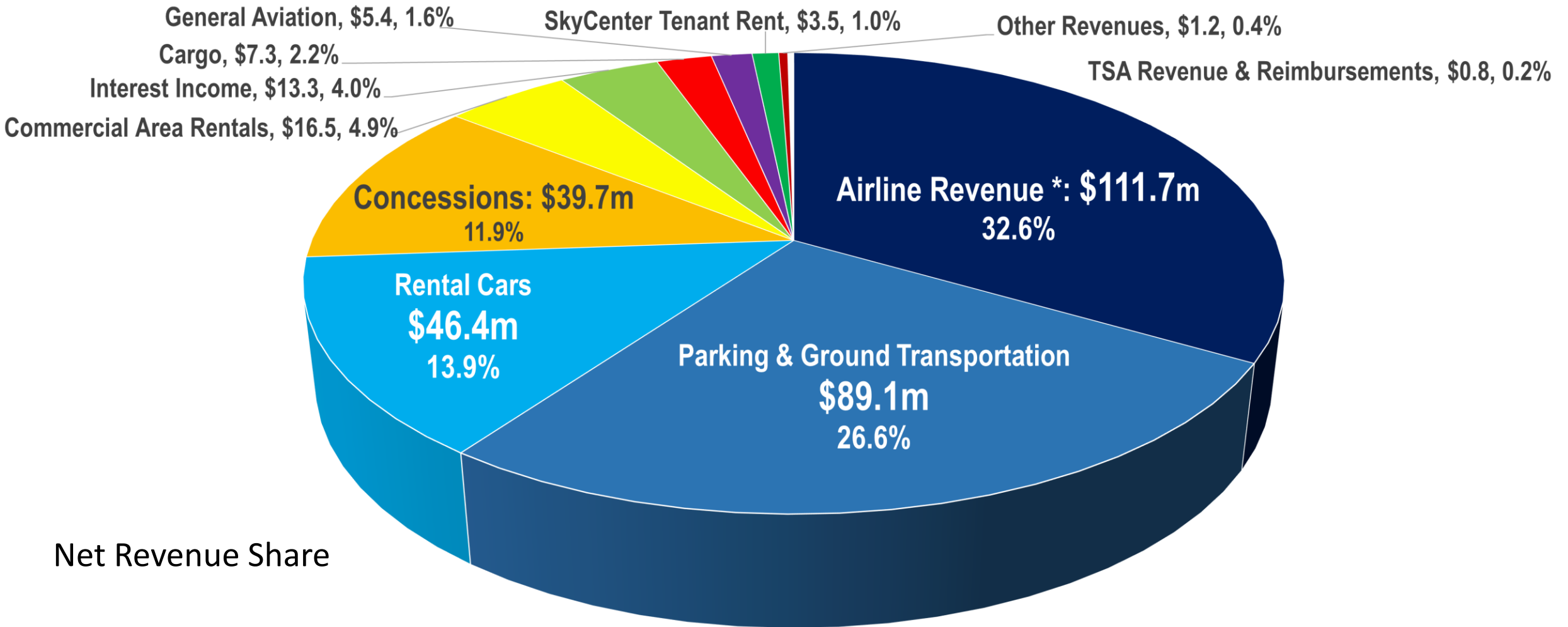
Net Revenue Share

*Net Airline Revenue (ASIP & Revenue Sharing)

Top 3 Largest Airline Market Share by percentage

Southwest
26.2%

Delta
17.8%

American
17.1%
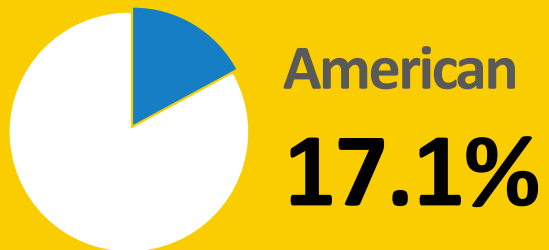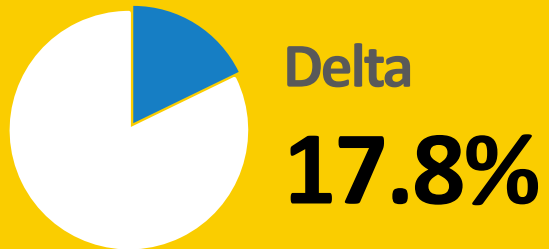
553
Daily Flight Operations

93
Nonstop Destinations

16
International Destinations

Top 10 Markets for Tampa

1. New York
2. Chicago
3. Atlanta
4. Boston
5. Philadelphia
6. Detroit
7. Dallas
8. Denver
9. Washington, D.C.
10. Minneapolis

Calendar Year 2022
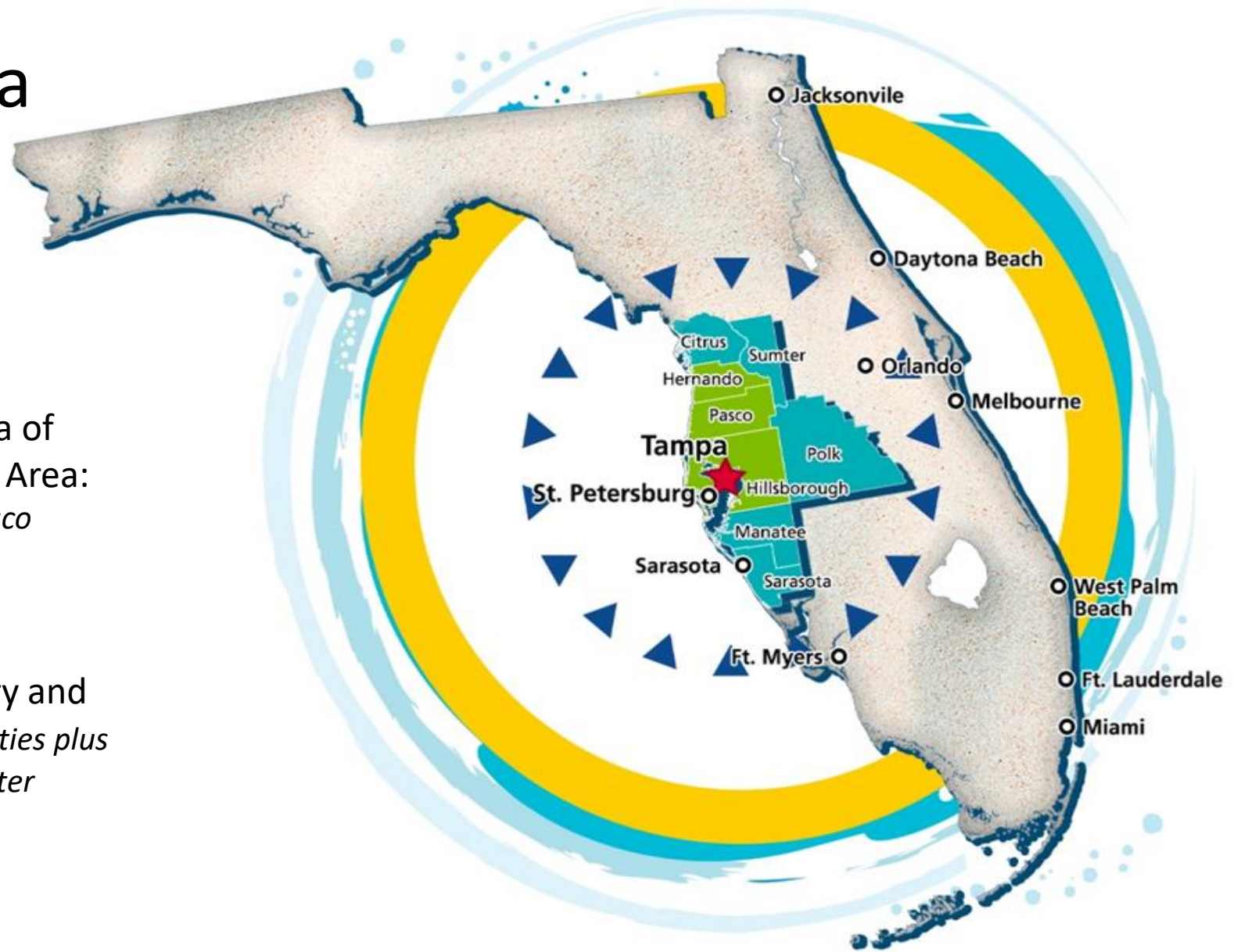
Tampa International Airport

TPA's Catchment Area

3.3 million

in 4-county primary catchment area of Tampa Bay Metropolitan Statistical Area: *Hillsborough, Pinellas, Hernando and Pasco*

5.2 million

in 9-county area comprising primary and secondary catchments: *Primary counties plus Citrus, Manatee, Sarasota, Polk and Sumter*
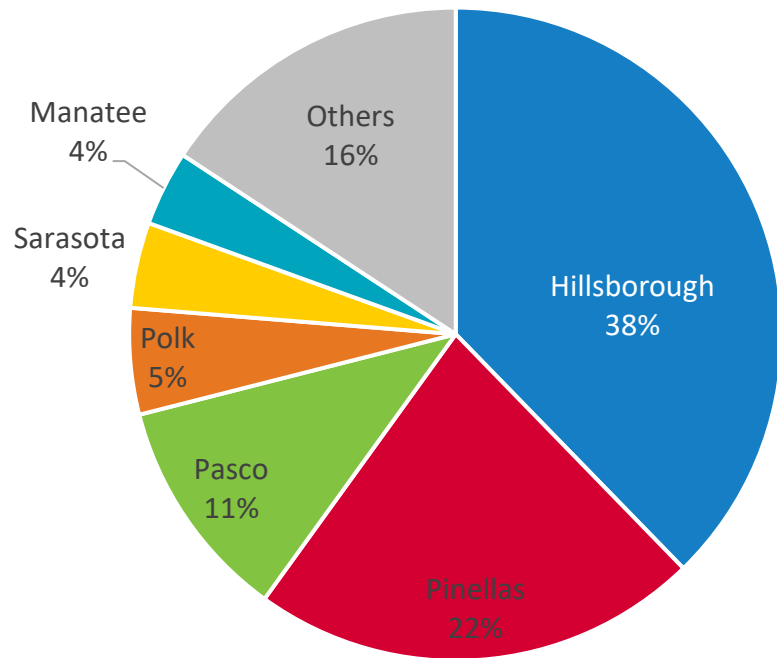
Source: ESRI Business Analyst – 2022 Total Population

Hillsborough & Pinellas Contribute 60% of Originating Traffic
Over 3,700 daily originating passengers come from other area counties

TPA Domestic Traffic by Originating County

- Hillsborough 38%
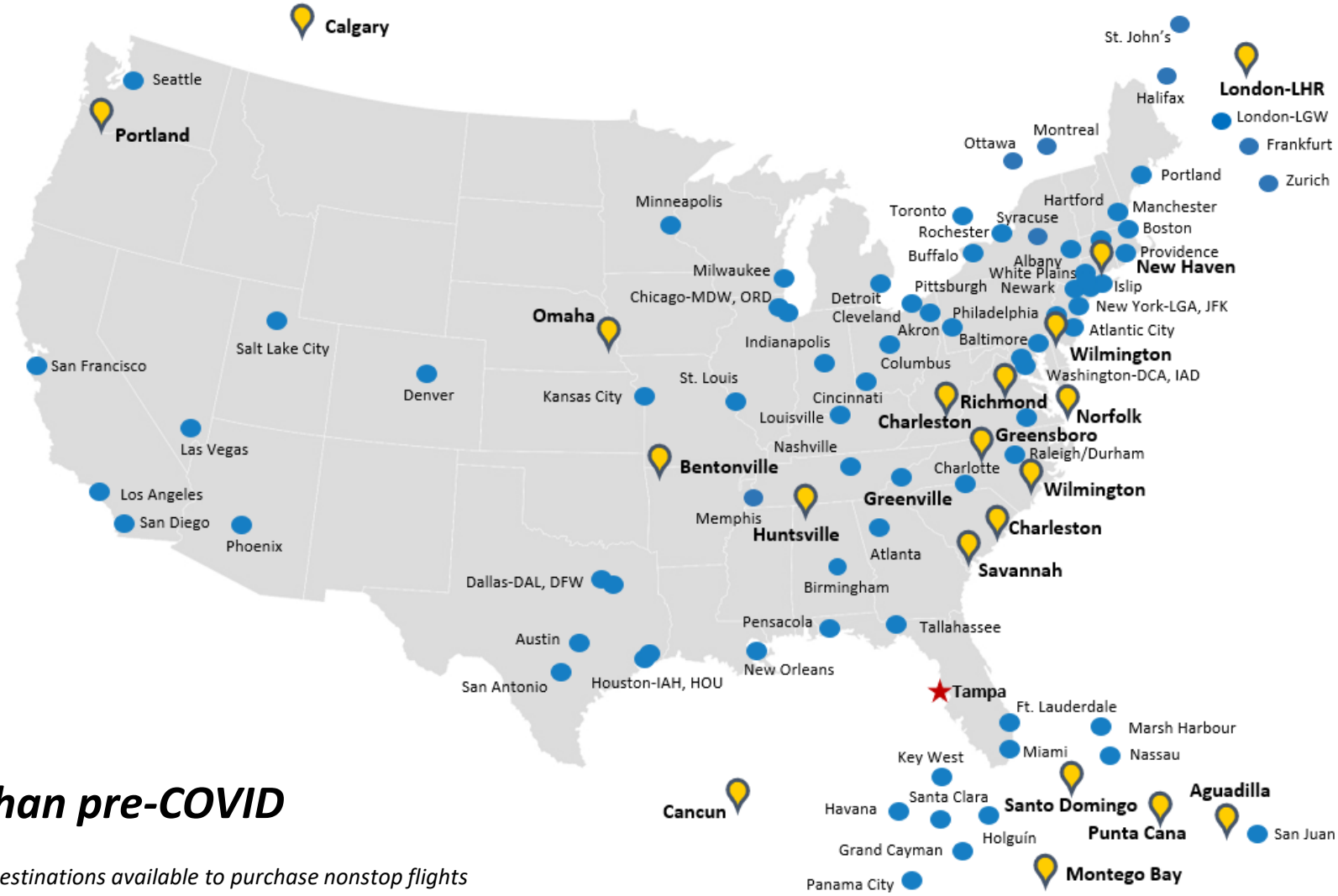- Pinellas 22%
- Pasco 11%
- Polk 5%
- Sarasota 4%
- Manatee 4%
- Others 16%

Source: ADI Airport Catchment Analytics (YE June 2022) – TPA Primary and Secondary Catchments

Hillsborough County Aviation Authority

Tampa International Airport

TPA Nonstop Destinations

Legend:
- 🔵 *Currently Served*
- 📍 *New Service Post-Pandemic*

TPA currently serves more points than pre-COVID

Source: Diio Mi Schedule July 12, 2023. Currently Served includes all destinations available to purchase nonstop flights

Tampa International Airport

Upcoming Domestic and International Launches at TPA

July	September	October	November

Breeze
- Providence

Breeze
- Raleigh-Durham

Breeze
- Charleston (WV)
- Columbus
- Pittsburgh

Lynx AIR
- Montreal
- Toronto

jetBlue
- Aguadilla

Silver AIRWAYS
- Greensboro
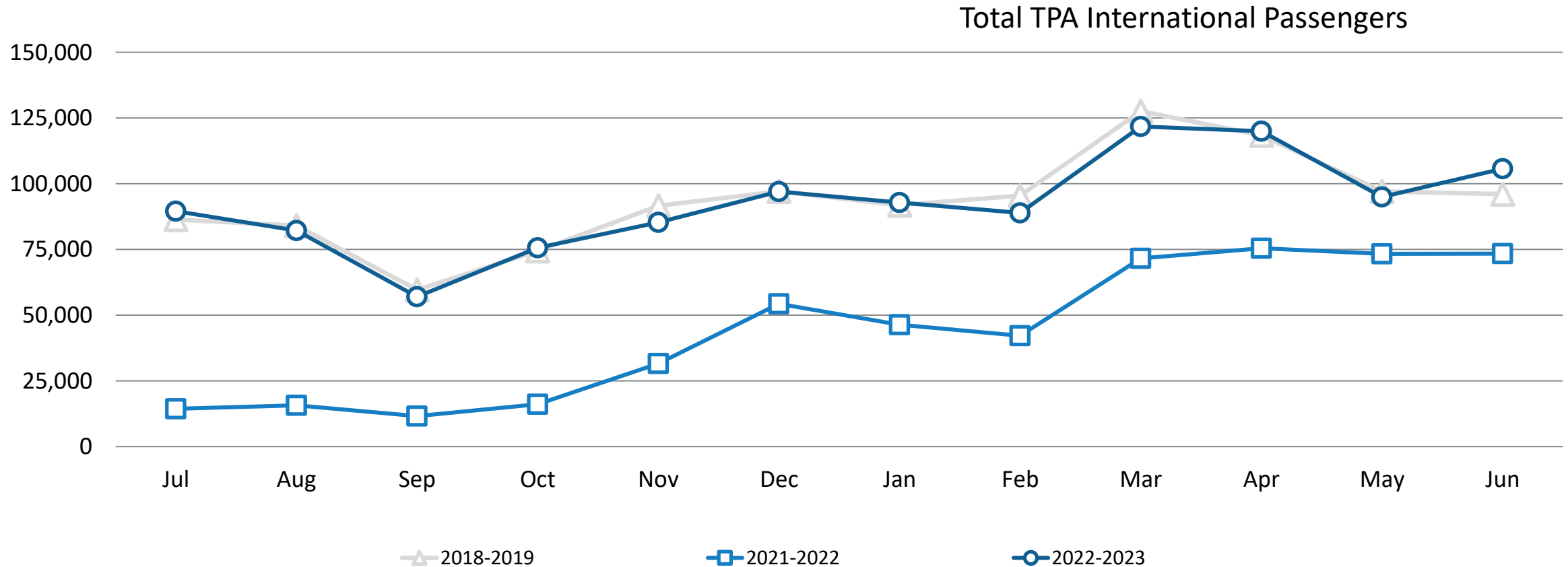
Alaska
- San Diego

International Passengers

TPA served 105,704 international passengers in June 2023, +10.0% vs. June 2019 and +44.0% vs. June 2022

Total TPA International Passengers

TPA Largest Unserved

Domestic

City	2022 PDEW
Sacramento	76.9
Santa Ana	59.3
Albuquerque	53.9
San Jose	39.5
Reno	38.5
Des Moines	34.4
Burlington	33.2
Greensboro	31.8
Madison	30.1
Oakland	26.4
Asheville	23.4

International

City	2022 PDEW
Rome	33.5
Amsterdam	33.3
Paris	31.9
San Jose del Cabo	24.2
Dublin	23.0
San Jose, CR	21.5
Barcelona	21.2
Mexico City	15.9

Source: Diio Mi YE Dec 2022, PDEW= Passengers Daily Each Way

Tampa International Airport

MASTER PLAN

Phase 1: Decongestion
2013-2018
Complete

Rental Car Center

Automated People Mover

Main Terminal Expansion & Concessions Redevelopment

Phase 2: Enabling
2018-2025
Underway

Curbside Expansion

Complete:

SkyCenter Development

Central Utility Plant

Roadway Expansion

Phase 3: Growth
Construction 2024-2027
Next

16-gate Airside D

Tampa International Airport

Airside D

EXISTING

PROPOSED

STATUS: Received Board approval in September 2022; Board selected Design Builder in May 2023
NEXT: August 2023- Board awards Part 1 Design Contract
TIMELINE: Construction begins in 2024. Expected completion in 2027.

Accolades

#1 Medium-Size Airport in U.S. — Wall Street Journal

#1 Large Airport in North America — J.D. Power

#2 Best Large Airport — USA Today

#3 Best Airport in U.S. — Travel and Leisure

Top 3 Airports in North America & Top 5 Airports in the World — Airports Council International

Tampa International Airport

Team Introduction

Team Introduction

HCAA TEAM

Tampa International Airport

RICONDO TEAM

Pete Ricondo, PE
Project Manager
RICONDO®
29 Years of Airport Consulting Experience

Sebastien Carreau
Technical Services Lead
RICONDO®
20 Years of Airport Consulting Experience

Subconsultants

AECOM

AMERICAN INFRASTRUCTURE DEVELOPMENT, INC.
TRANSPORTATION CONSULTING

GSS graphic support services, inc.

NSI Northwest Surveying Inc.

newhouse&associates

VTC

apr aguirre project resources
achieving project results...

ESA

MTZ MARTINEZ GEOSPATIAL

QUEST.

Agenda

Introduction/Opening Remarks

Master Plan Update Definition and Process

– **What is an Airport Master Plan Update?**

– **Why Prepare a Master Plan Update?**

2022 MPU Project Schedule and Goals

Aviation Activity Forecasts

Master Plan Recommendations by Planning Activity Level

Airport Layout Plan (ALP) Considerations

– **Airfield**

– **Evolving Technology – Advanced Air Mobility**

Questions and Discussions

What is an Airport Master Plan Update?

"An airport master plan is a comprehensive study of an airport and usually describes the short-, medium-, and long-term development plans to meet future aviation demand."

- FAA Advisory Circular 150/5070 – 6B – Airport Master Plans

Responds to the local and regional air transportation needs

Serves as a roadmap for achieving HCAA's vision and airport improvement strategies for TPA

Reflects new and emerging industry trends

Ensures compliance with ongoing changes in airport design criteria

Guides future airport development and enhancements

Why Prepare a Master Plan Update?

✈ Anticipate and prepare for future demand

↪ Remain proactive, given the economic value of TPA as a gateway to the West Coast of Florida

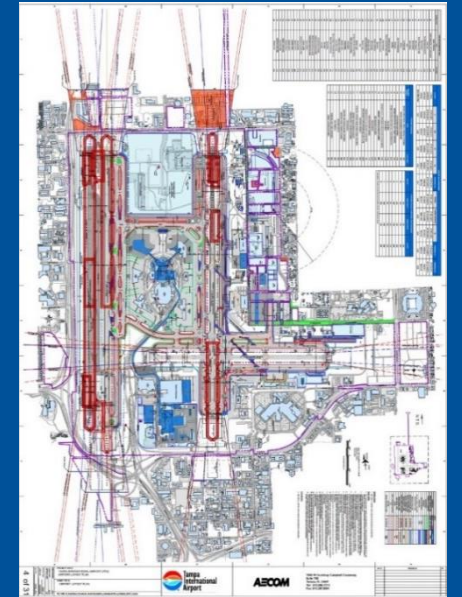📅 Prepare a strategy for the cohesive development of the Airport

♻ Maintain long-term financial sustainability

$ Leverage state and federal funding sources

Culminates with an updated Airport Layout Plan

Federal Aviation Administration Airport Improvement Program (AIP)

2022 MPU Progress Update

Legend:
- ● Completed
- ● Ongoing
- ● Future Tasks

Process steps:
1. Inventory/Data Collection
2. Forecasts
3. Land Use Planning
4. Capacity Analyses
5. Capacity Needs
6. Alternatives
7. Other Airport Enhancements
8. Access/Infrastructure Needs
9. Refine Alternatives
10. Implementation Planning
11. Capital Improvement Program
12. Financial Modeling
13. Airport Layout Plan

Timeline:
- Fall
- Winter
- Spring
- Summer
- Fall
- Winter
- Spring
- Summer
- Fall
- Winter

Public Outreach Meeting #1
April 25, 2022

Public Outreach Meeting #2
November 16, 2022

Public Outreach Meeting #3
July 25, 2023

2021 **2022** **2023** **2024**

2022 Master Plan Update Goals

Formulate 20-year forecasts for the Airport

April 2022

Identify newer or emerging trends and technologies

July 2022- February 2023

Assess TPA's existing airfield capacity

August 2022

Revalidate Airside D plan and assess timing for the initial buildout of the North Terminal

June 2022

Validate the Terminal, roadway and curbfront capabilities to serve 34-million annual passengers

October 2022

Assess needs and opportunities for additional capacity enhancements

August 2022 - April 2023

Aviation Activity Forecasts

# Total Passengers Forecast (in Million Annual Passengers) and Planning Activity Levels (PALs)

Forecast

FY 2022-2042 Compound Annual Growth Rate: 3.1%

PAL 1:
30.5 MAP
(FY 2032)

PAL 2:
34.6 MAP
(FY 2037)

PAL 3:
38.8 MAP
(FY 2042)

APPROVED BY FAA
April 29, 2022

Legend:
- Historical
- FY 2022 Actual
- MPU Baseline Forecast

Annual Total Passengers (millions) — Fiscal Year
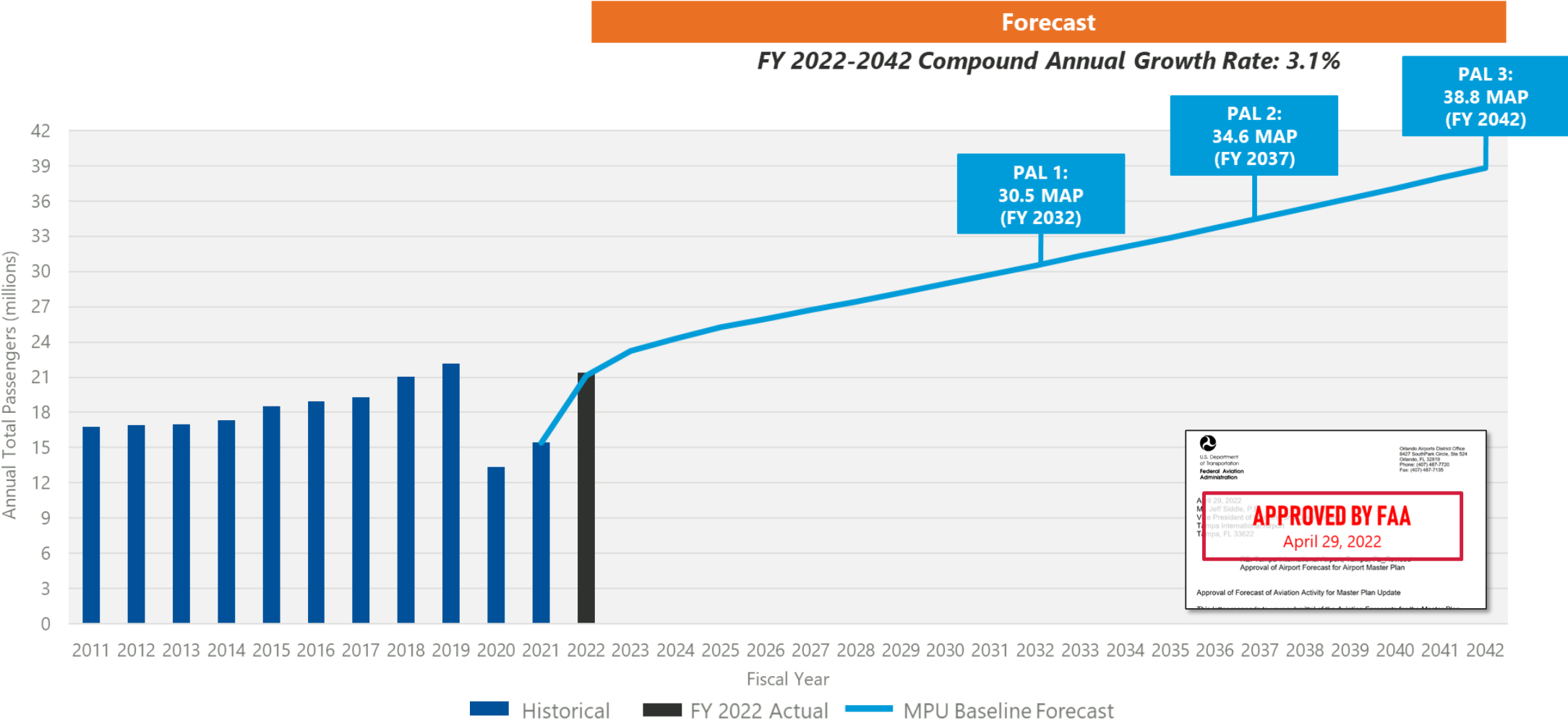
Note: Full recovery will be achieved when the rolling average of the 12-month passenger enplanements will return to FY 2019 volumes, which is forecast to occur in FY 2023.

Sources: Hillsborough County Aviation Authority (historical), November 2021; Ricondo & Associates, Inc. (forecast), November 2021.

Total Aircraft Operations Forecast

Forecast

FY 2022-2042 Compound Annual Growth Rate: 2.4%

177K

344K

Total Aircraft Operations

Fiscal Year

■ Historical   ■ FY 2022 Actual   — MPU Baseline Forecast
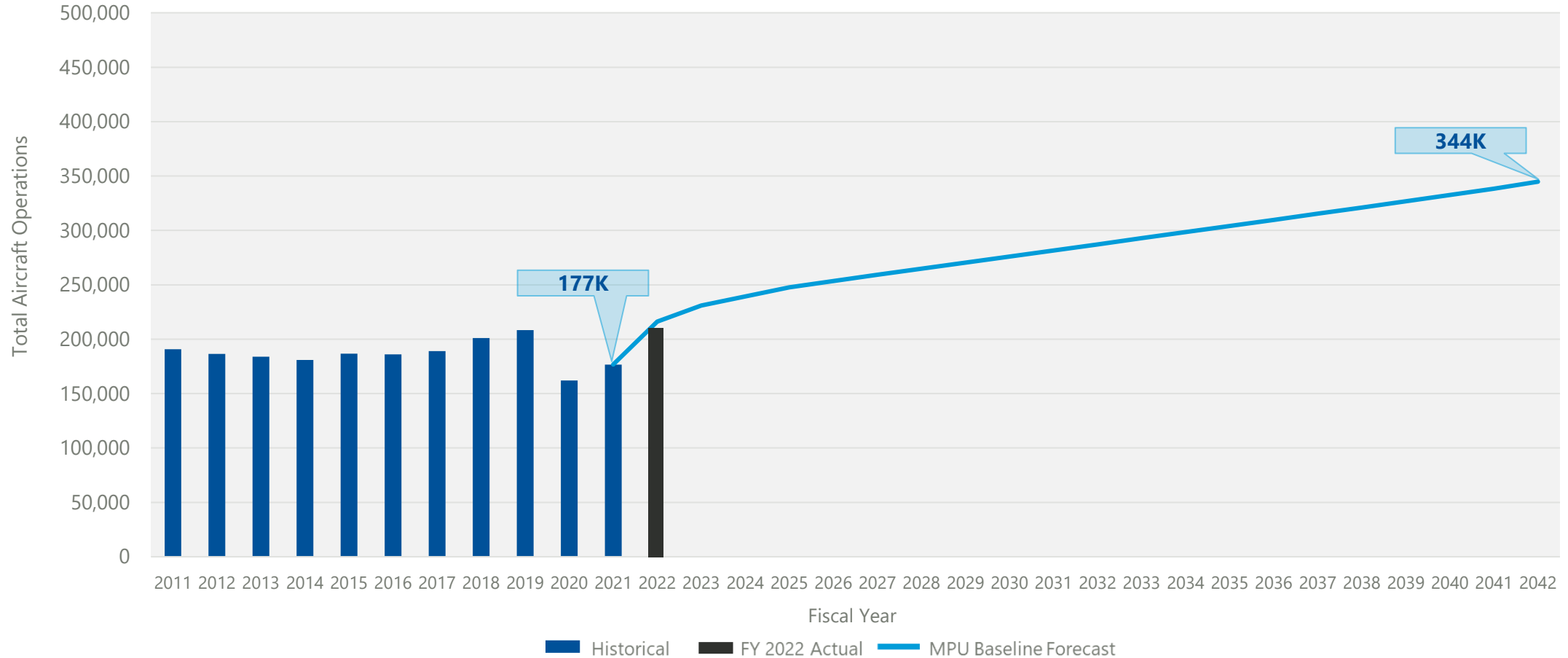
Master Plan Recommendations by Planning Activity Levels

Airport Needs to Serve PAL 1 (30.5 MAP; FY 2032)
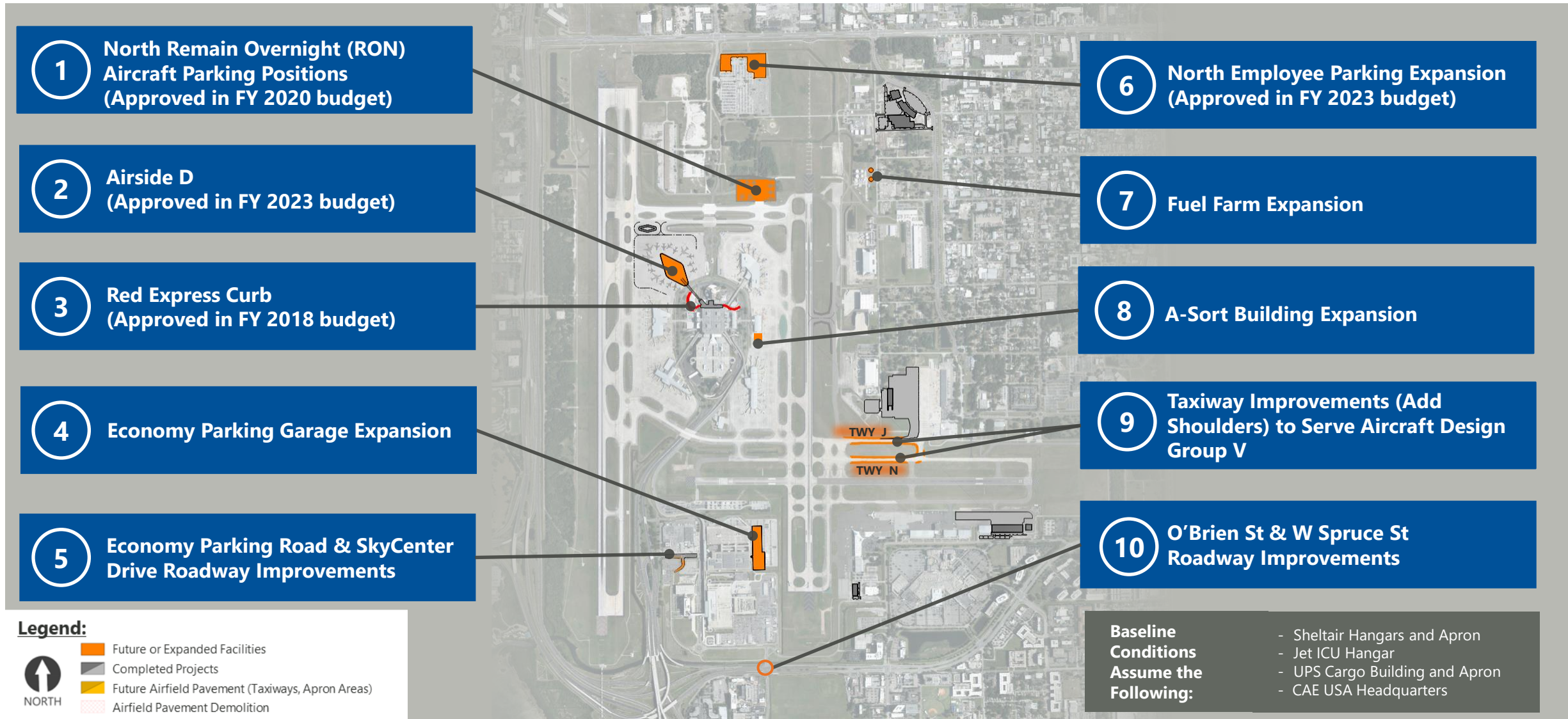
1 North Remain Overnight (RON) Aircraft Parking Positions (Approved in FY 2020 budget)

2 Airside D (Approved in FY 2023 budget)

3 Red Express Curb (Approved in FY 2018 budget)

4 Economy Parking Garage Expansion

5 Economy Parking Road & SkyCenter Drive Roadway Improvements

6 North Employee Parking Expansion (Approved in FY 2023 budget)

7 Fuel Farm Expansion

8 A-Sort Building Expansion

9 Taxiway Improvements (Add Shoulders) to Serve Aircraft Design Group V

10 O'Brien St & W Spruce St Roadway Improvements

Legend:
- Future or Expanded Facilities
- Completed Projects
- Future Airfield Pavement (Taxiways, Apron Areas)
- Airfield Pavement Demolition

NORTH

Baseline Conditions Assume the Following:
- Sheltair Hangars and Apron
- Jet ICU Hangar
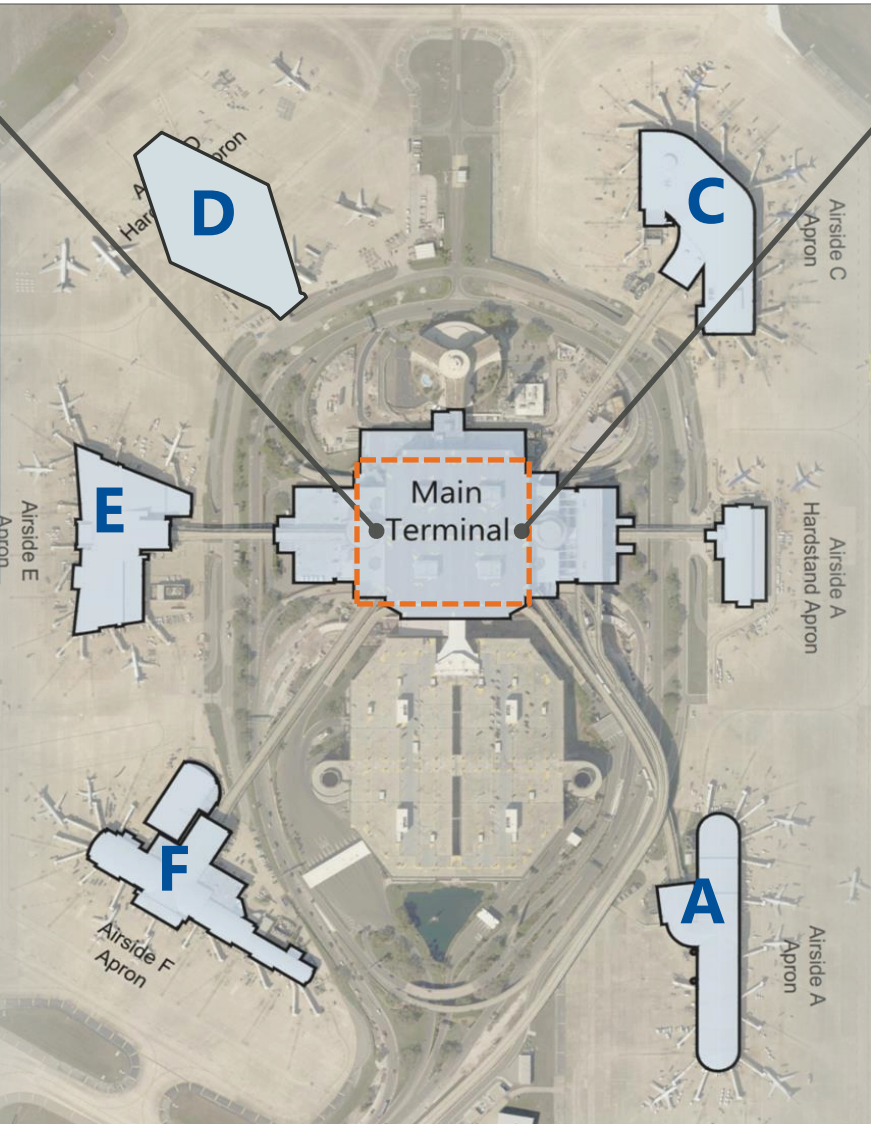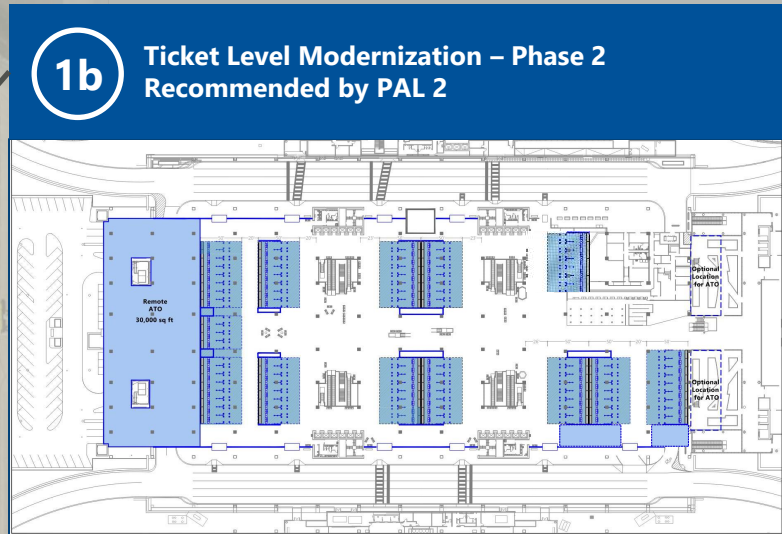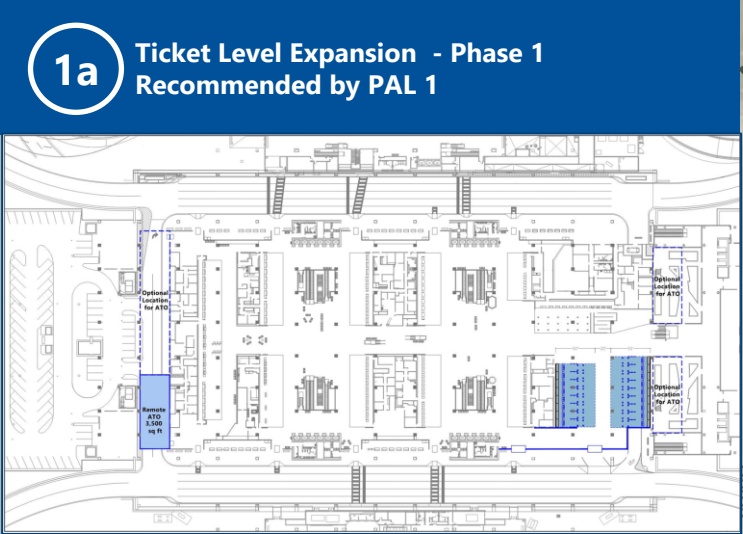- UPS Cargo Building and Apron
- CAE USA Headquarters

TWY J

TWY N

Airport Needs to Serve PAL 2 (35 MAP; FY 2037)

1 Ticket Level Expansion and Modernization

2 Baggage Claim Expansion

3 Economy Parking Road & SkyCenter Drive Roadway Improvements

4 Airport Service Road & SkyCenter Drive Roadway Improvements

5 O'Brien Street & Airport Service Road Roadway Improvements

6 Fuel Farm Expansion

7 Potential Taxiway E Relocation (ADG V Taxiway)

8 Potential New Air Cargo Facilities and Expansion of Existing Air Cargo Facilities

9 Potential Taxiway T Relocation (ADG III Taxiway) and General Aviation Facilities Expansion

Legend:

NORTH

- Future or Expanded Facilities
- Completed Projects
- Future Airfield Pavement (Taxiways, Apron Areas)
- Airfield Pavement Demolition

Ticket Level Expansion and Modernization

1a Ticket Level Expansion - Phase 1
Recommended by PAL 1

1b Ticket Level Modernization – Phase 2
Recommended by PAL 2

D

C

E

Main Terminal

Airside E Apron

Airside C Apron

Airside A Hardstand Apron
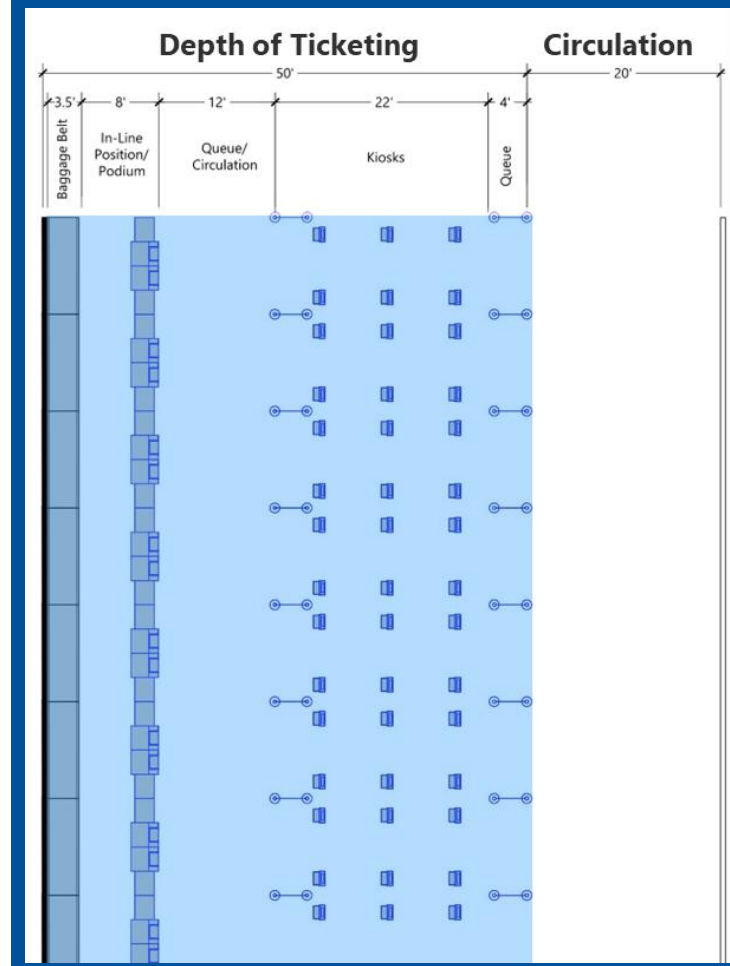
F

A

Airside F Apron

Airside A Apron

N

LEGEND
Existing Terminal Building

Ticket Level Expansion and Modernization
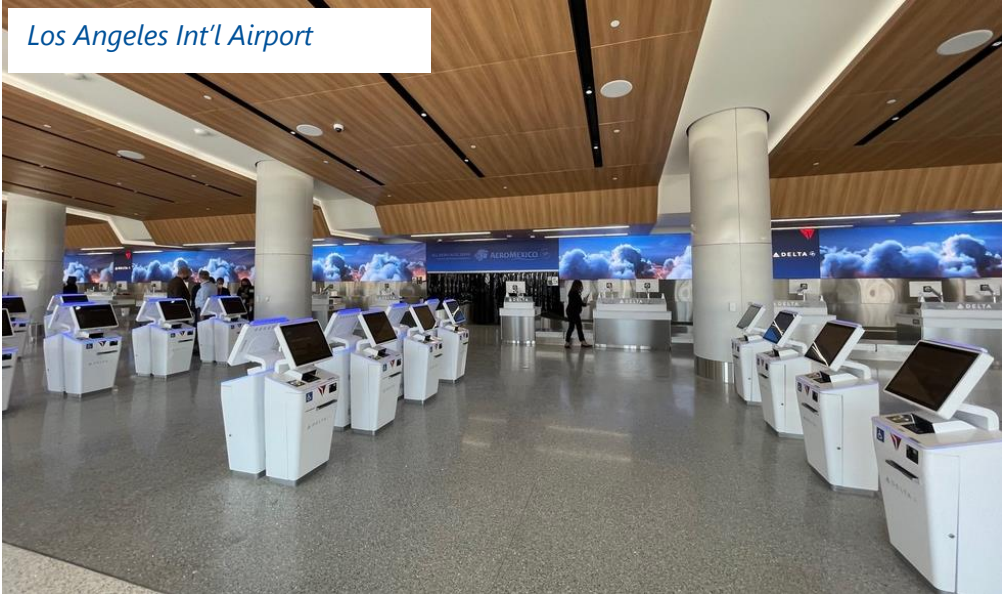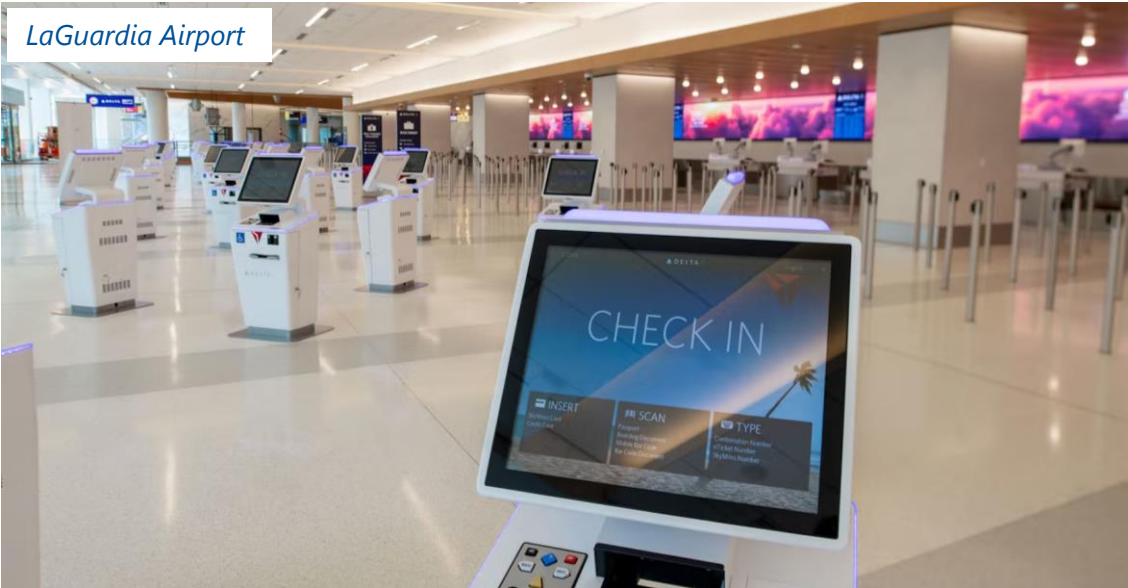## Enlarged Ticket Counter and Ticket Lobby Template
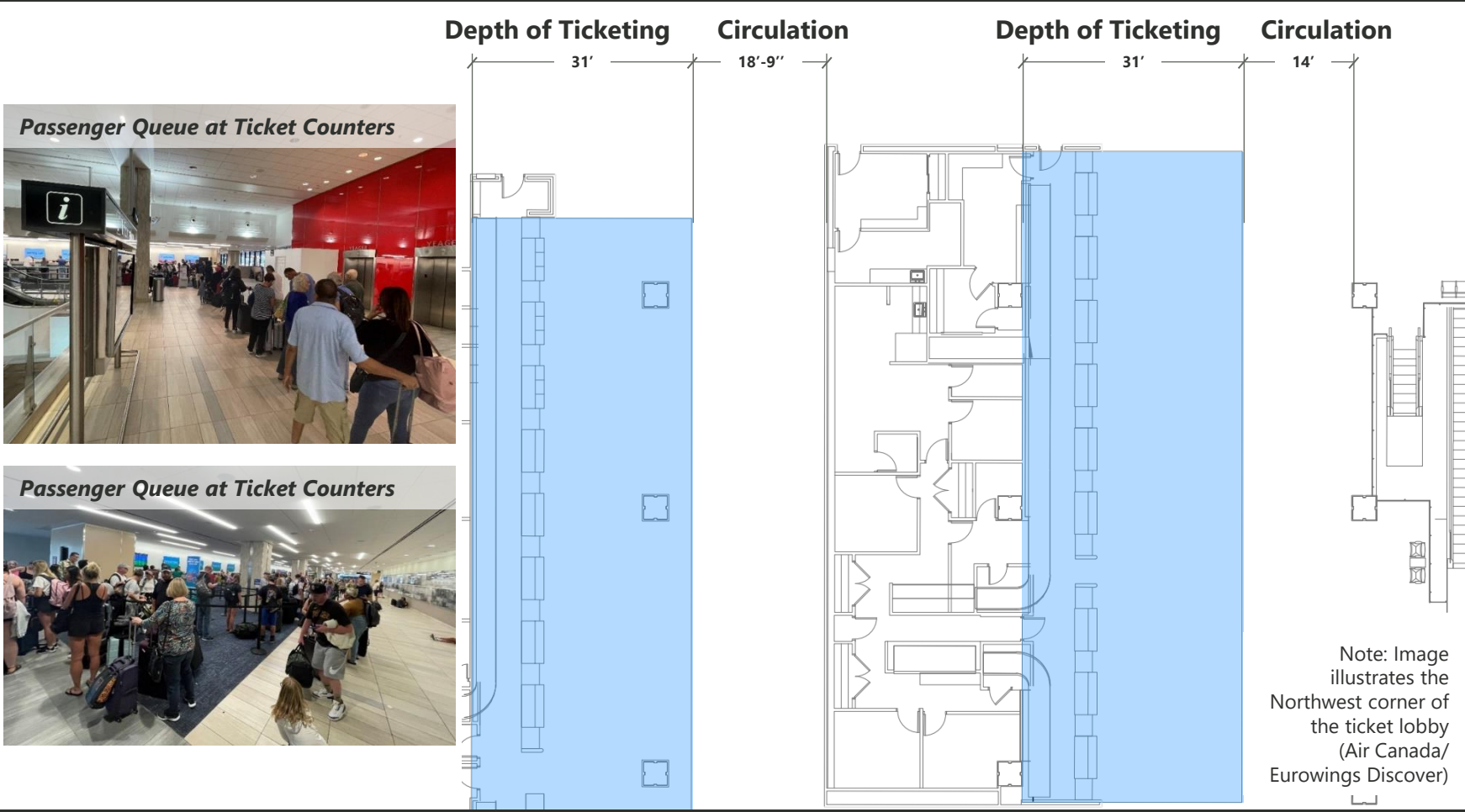
Illustrative Examples for Future Configuration
Modernizing and Positioning for the Future

LaGuardia Airport

Los Angeles Int'l Airport

Orlando Int'l Airport

Ticket Level Expansion | Phase 1

Existing Positions: 182
PAL 2 Requirements: 221

Optional Location for ATO
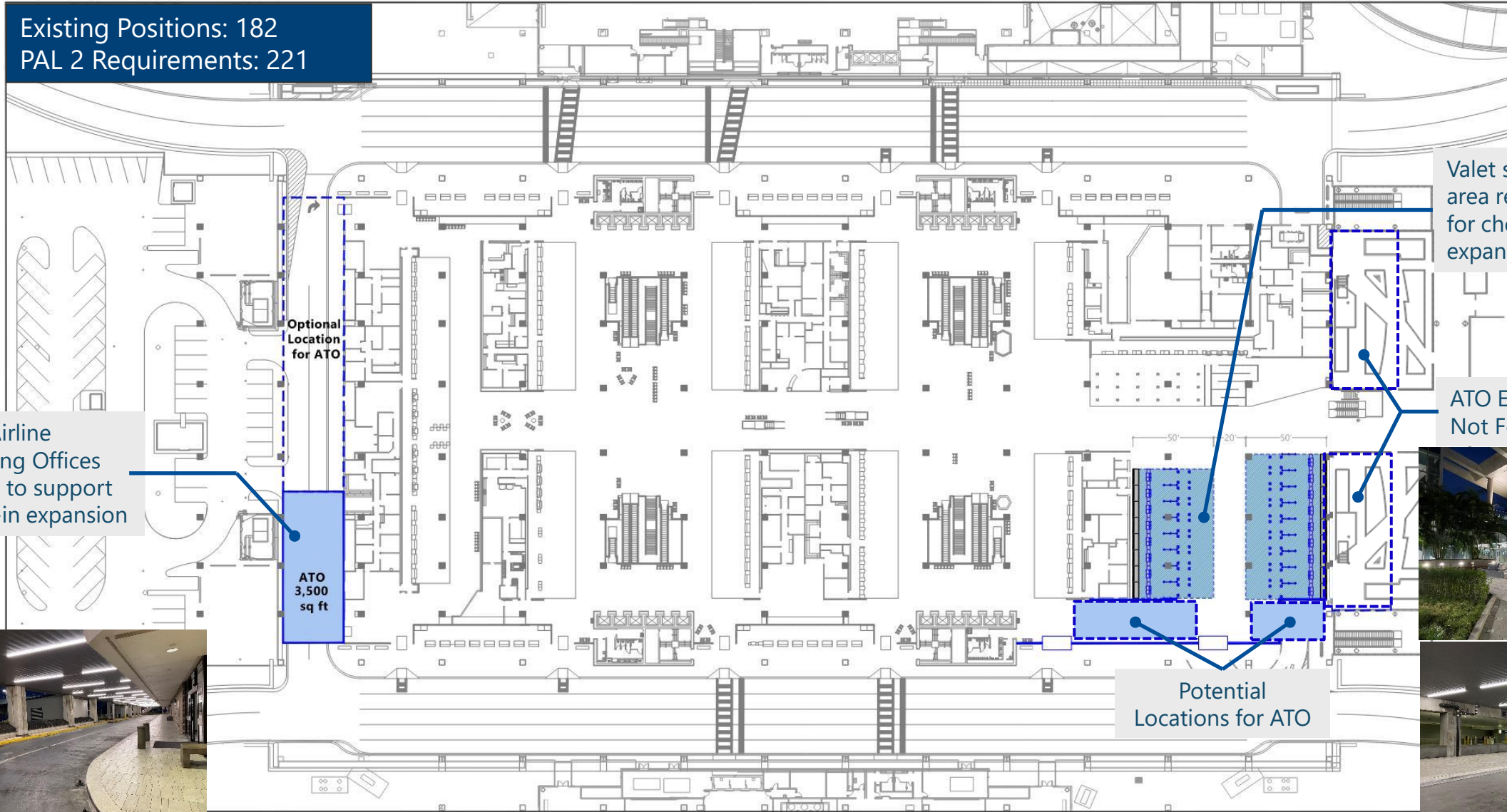
New Airline Ticketing Offices (ATOs) to support check-in expansion

ATO 3,500 sq ft

Valet service area repurposed for check-in expansion
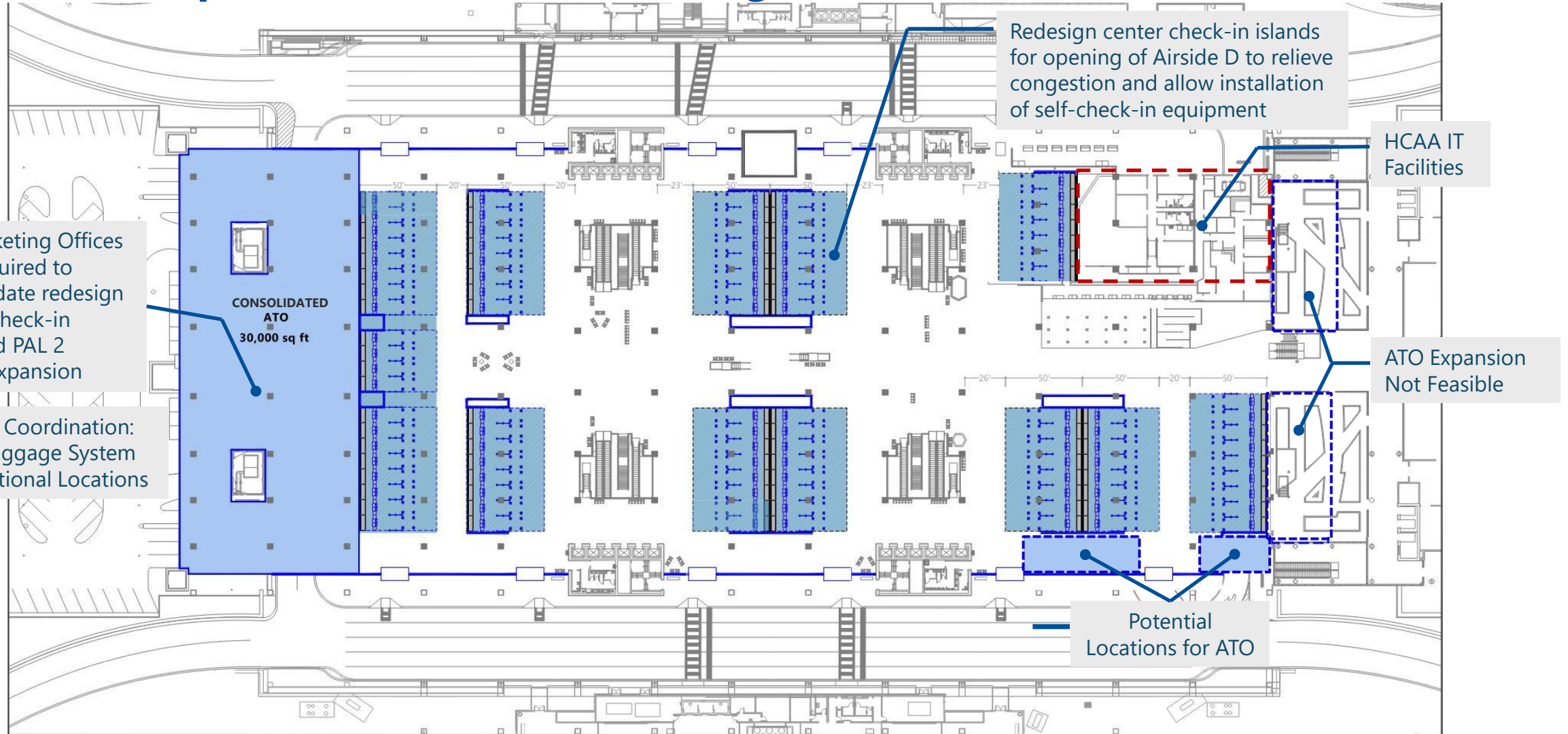
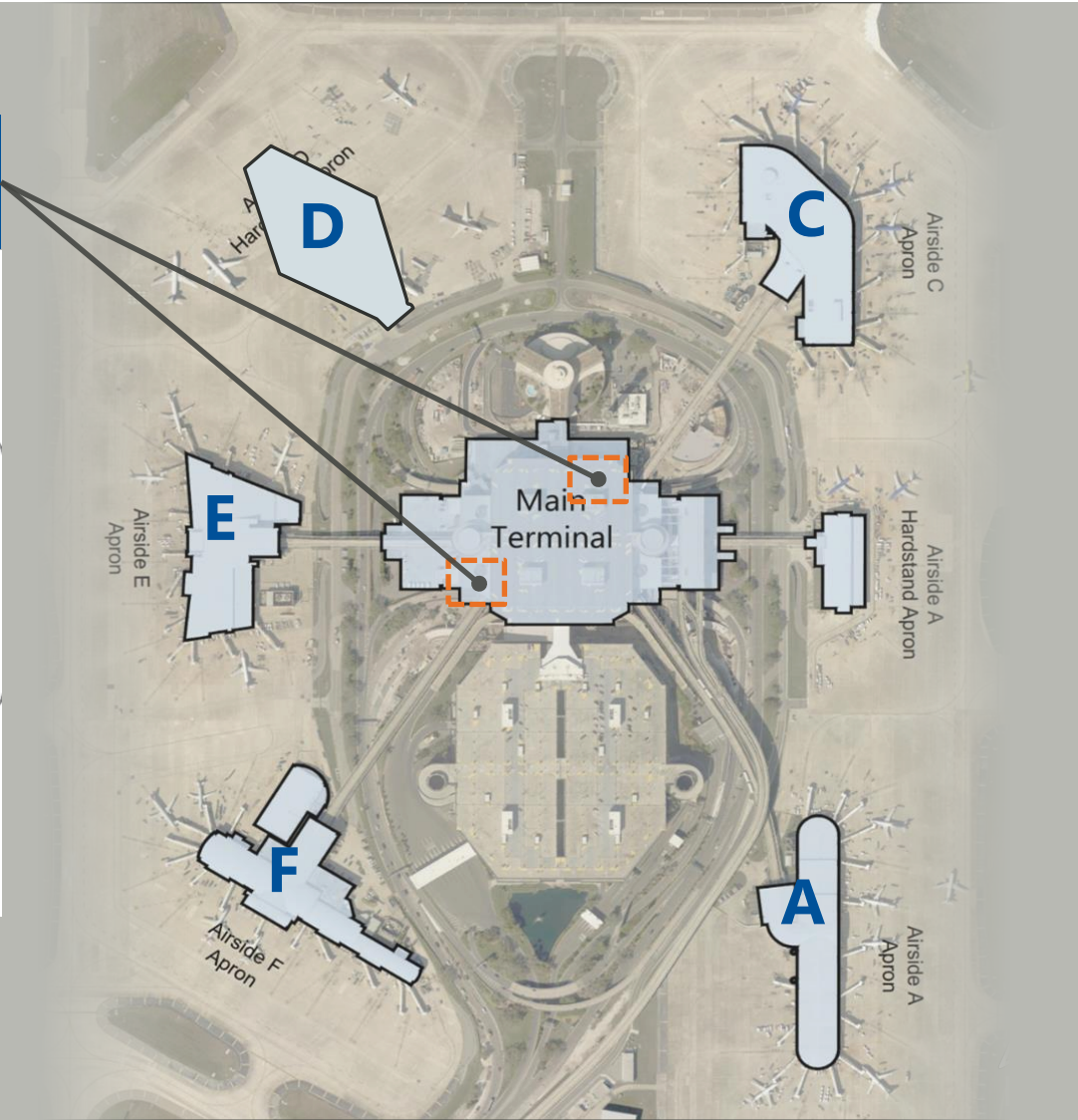ATO Expansion Not Feasible
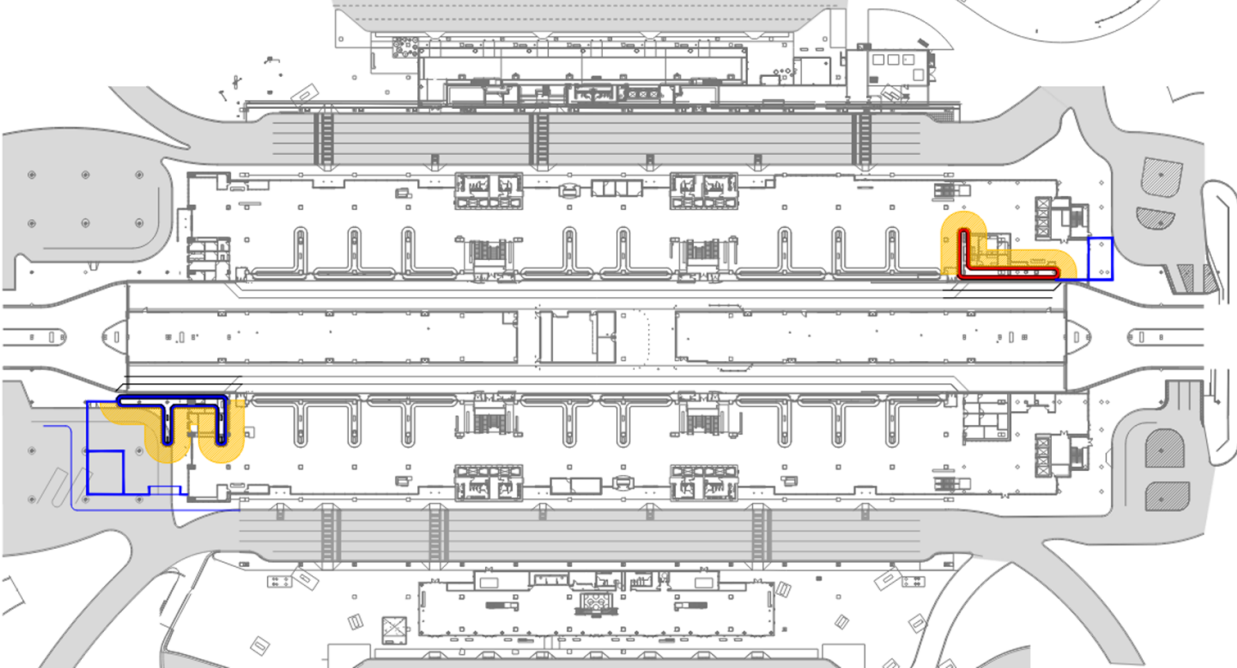
Potential Locations for ATO
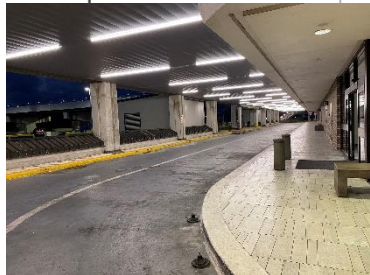
Ticket Level Modernization and Expansion | Phase 2
Additional Improvements to Relieve Congestion

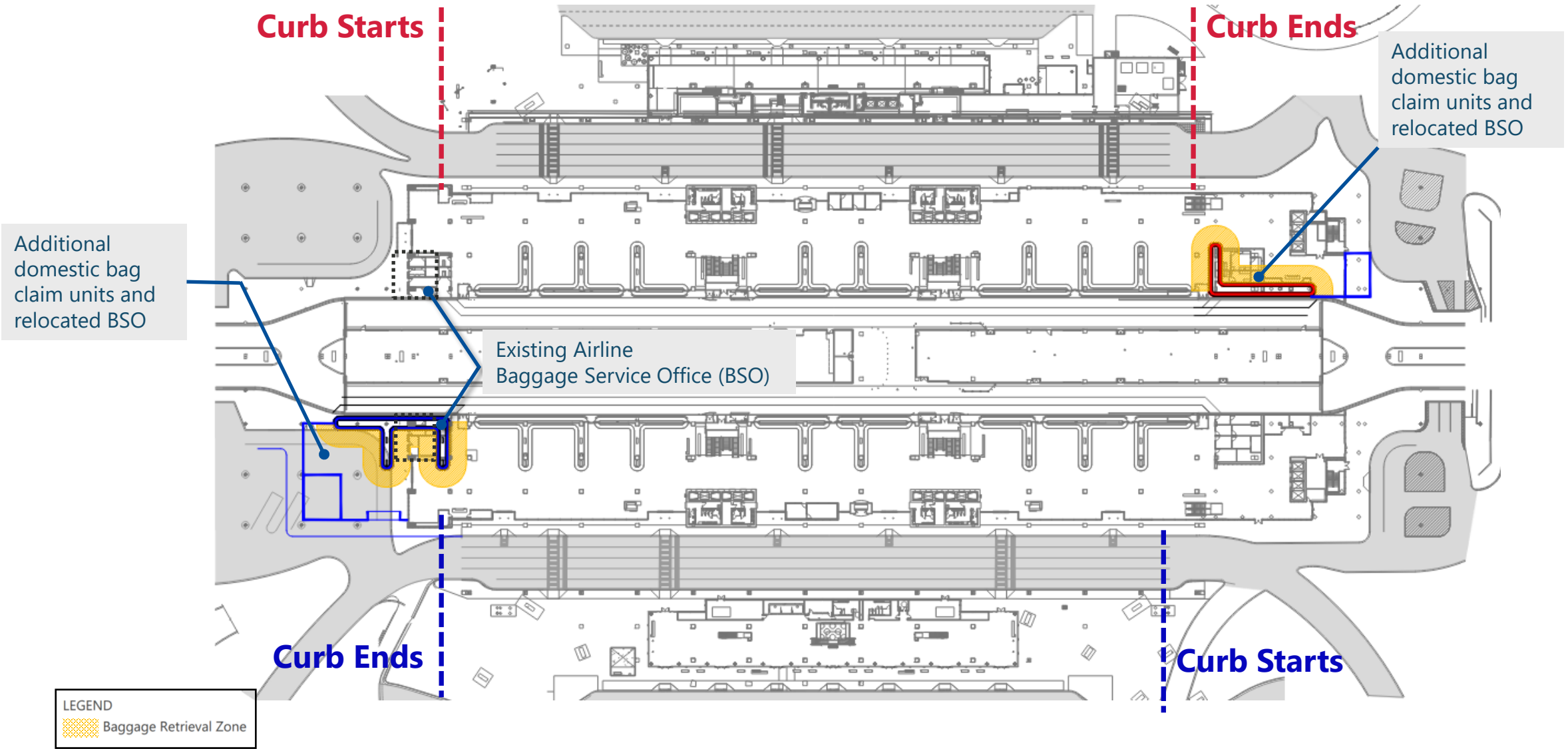Redesign center check-in islands for opening of Airside D to relieve congestion and allow installation of self-check-in equipment

HCAA IT Facilities

Airline Ticketing Offices (ATOs) required to accommodate redesign of center check-in islands and PAL 2 check-in expansion

CONSOLIDATED ATO
30,000 sq ft

ATO Expansion Not Feasible

Additional Coordination:
- West Baggage System
- ATO Optional Locations

Potential Locations for ATO

Baggage Claim Expansion

2 — Baggage Claim Expansion
Recommended by PAL 2

Main Terminal

D

C

E

F

A

Airside C Apron

Airside A Hardstand Apron

Airside E Apron

Airside F Apron

Airside A Apron

Baggage Claim Expansion

Curb Starts

Curb Ends

Additional domestic bag claim units and relocated BSO

Additional domestic bag claim units and relocated BSO

Existing Airline Baggage Service Office (BSO)

Curb Ends

Curb Starts

LEGEND

Baggage Retrieval Zone

Airport Needs to Serve PAL 3 (39 MAP; FY 2042)

1 Employee Parking Expansion

2 North Terminal Phase 1
- Gates
- Terminal Facilities
- Road and Curbs
- Parking Garage
- SkyConnect Extension

Future Gate and Expansion Area

5 Belly Cargo Facility Expansion

6 Bessie Coleman Blvd & Economy Parking Road Roadway Improvements

7 George Bean Parkway Roadway Improvements

8 Potential Taxiway T Extension (ADG III Taxiway) and General Aviation Facilities

Legend:
- Future or Expanded Facilities
- Completed Projects
- Future Airfield Pavement (Taxiways, Apron Areas)
- Airfield Pavement Demolition

NORTH

Gates and Terminal Requirements to Serve PAL 3 (39 MAP, FY 2042)

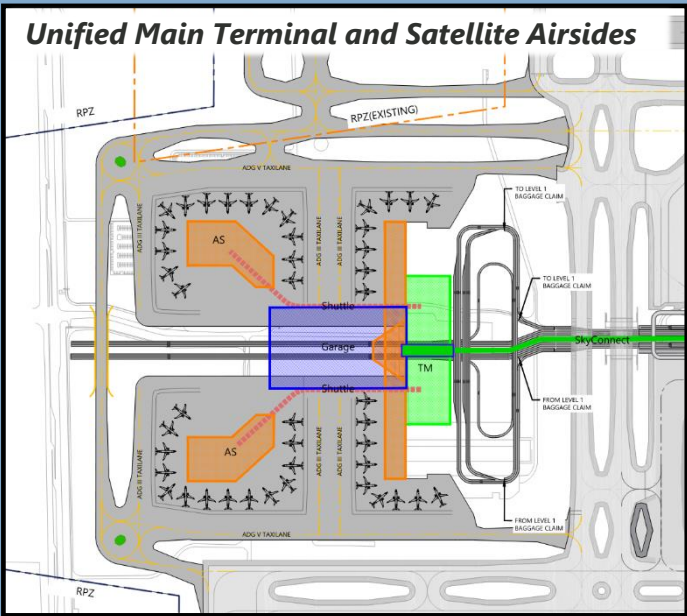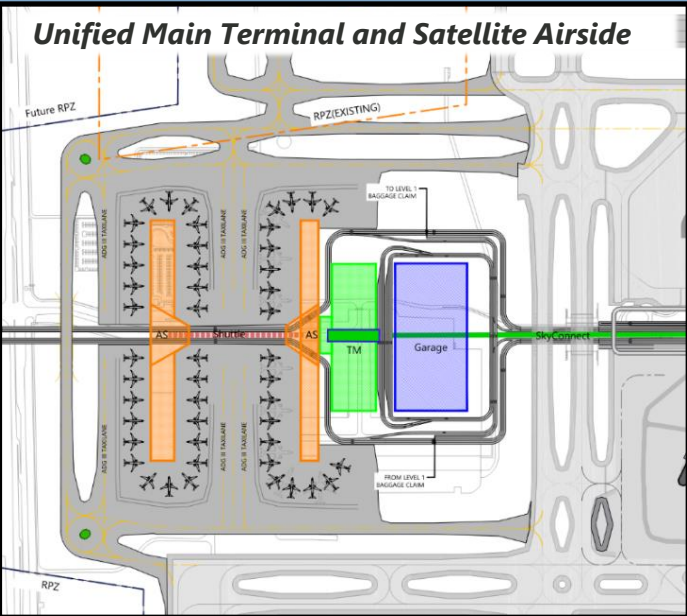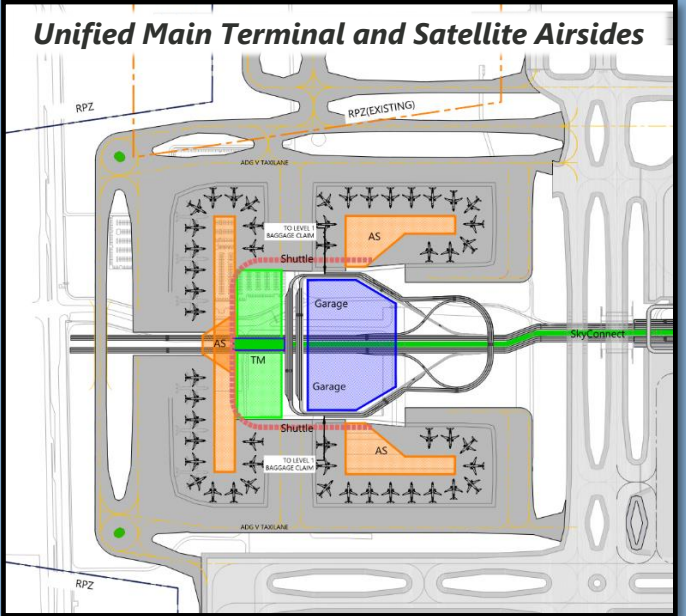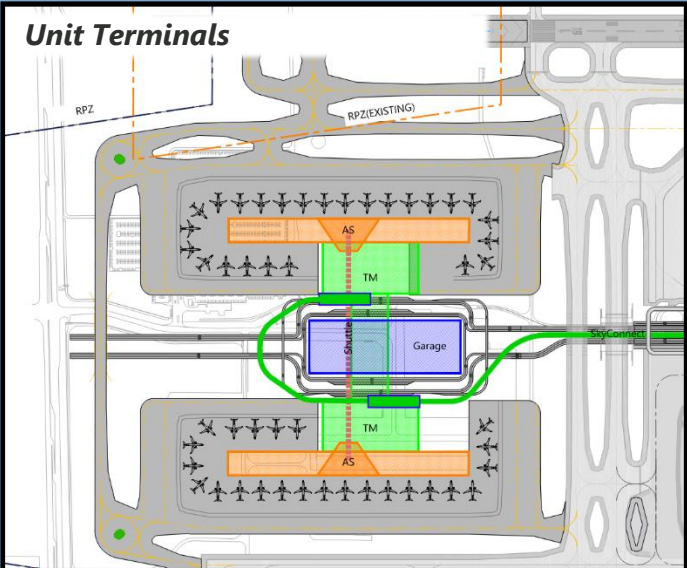- Additional Aircraft Gates (10 to 12)

- Ticket Lobby (44 counters)

- Outbound Baggage Systems

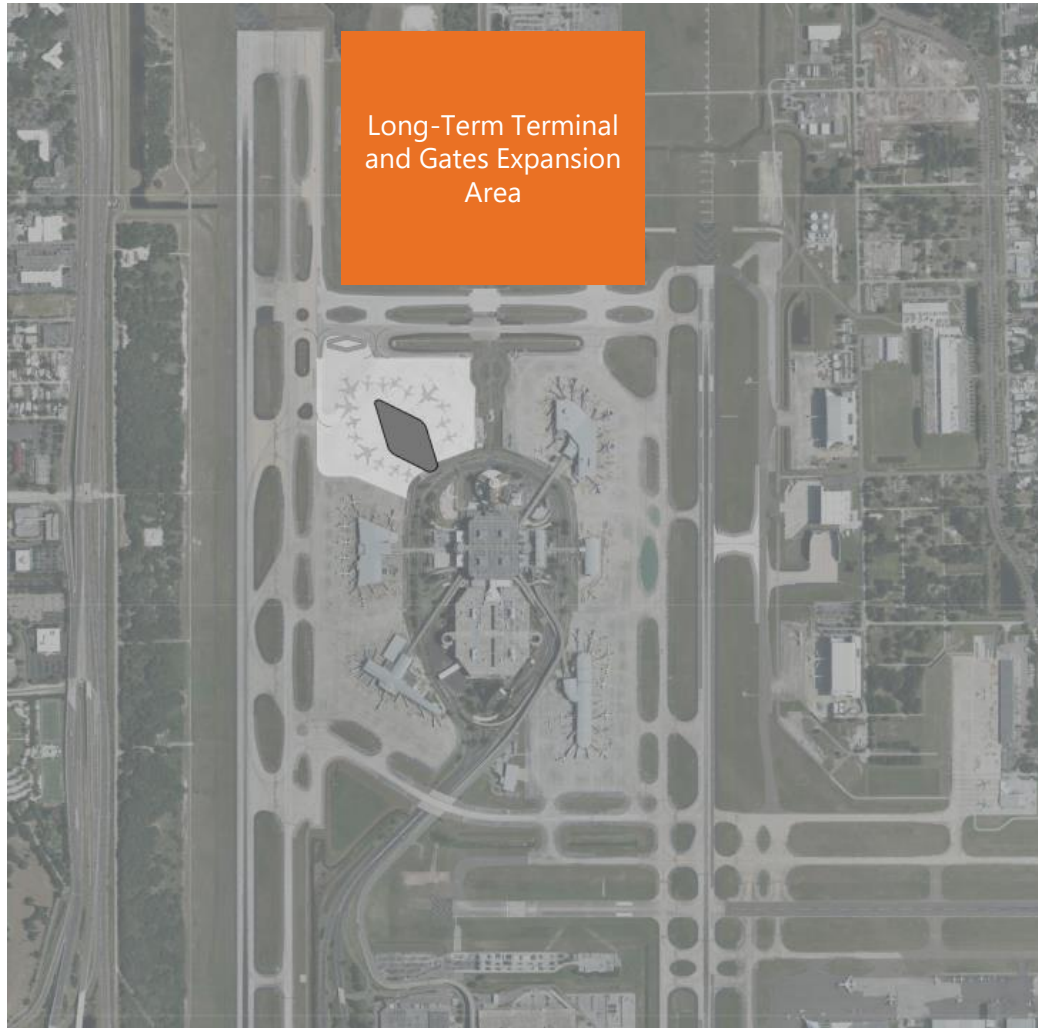- Baggage Claim Carousels (2 to 3 devices)

Long-Term Terminal and Gates Expansion Area
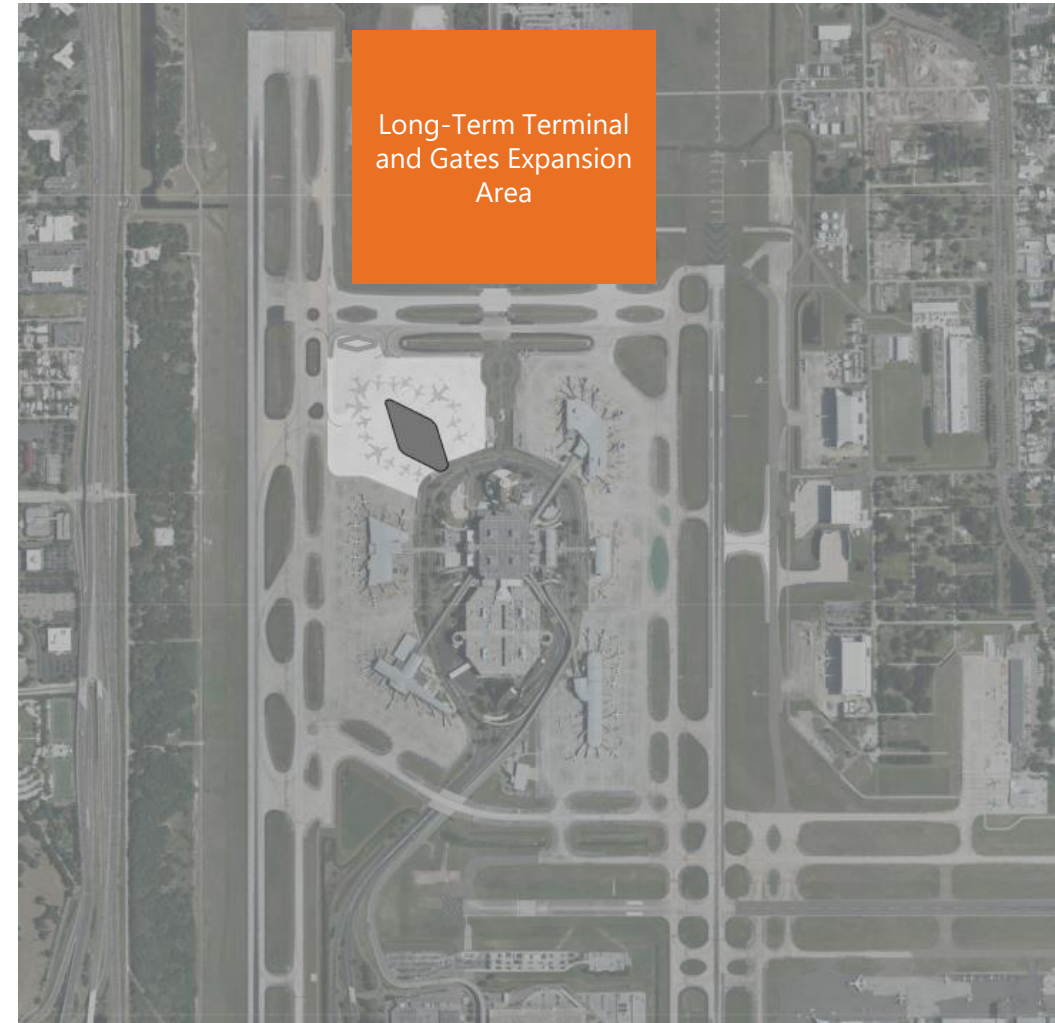
2022 MPU - North Terminal Alternatives

Satellite Airsides

Unified Main Terminal and Airside

Unit Terminals

Unified Main Terminal and Satellite Airsides

Unified Main Terminal and Satellite Airside

Unified Main Terminal and Satellite Airsides

2022 MPU Conclusions

Long-Term Terminal and Gates Expansion Area
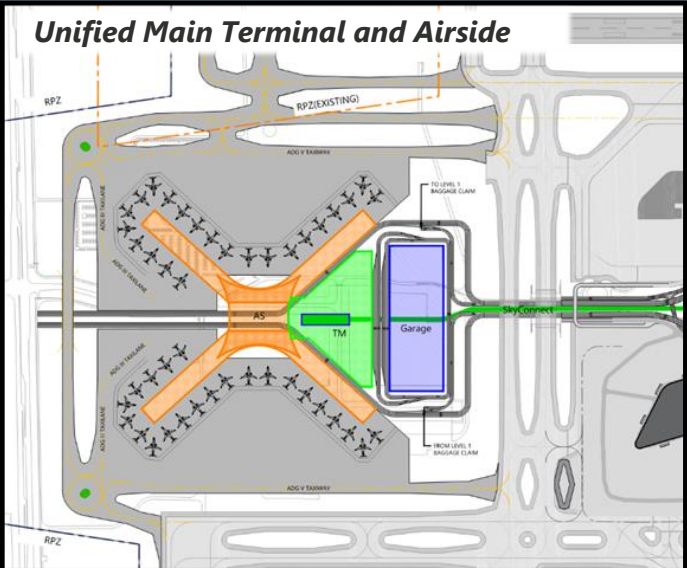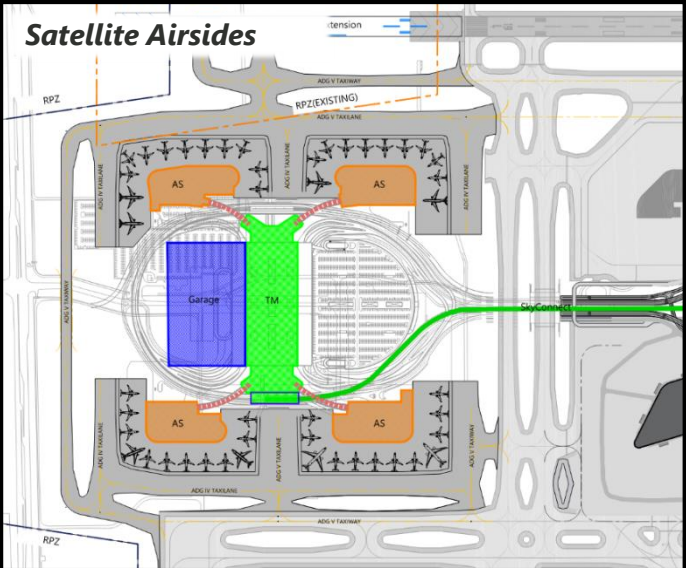
Master Plan Analysis Tested the Alternate Configurations for Serving the Following:

Site Supports up to a 45-Gate Buildout
- Passenger capacity up to approximately 55-60 MAP
- Compatible with airfield capacity including third parallel

Aircraft Hardstands

Dual Taxilane System

Landside Supporting Infrastructure to serve up to 45 Gates:
- Roadways and Curbs (peak month average day inbound daily traffic volumes up to 104,600)
- Parking Garage
- SkyConnect Extension

The long-term (15 years+) terminal and gates expansion area will be further refined and evaluated as part of the next Master Plan Update

Airport Layout Plan (ALP) Considerations

Airfield

2022 MPU Airfield Improvement Recommendations

- Primarily consisting of taxiway geometry and fillet improvements

- To support existing and projected aircraft fleets

- To comply with current FAA design standards (updated March 2022)

- Proposed improvements would be incrementally implemented as part of taxiway pavement rehabilitation projects

Legend:
- Future Airfield Projects (Taxiway Fillet, Taxiway Shoulders)
- Pavement Demolition

NORTH

Ultimate Airfield Reflected in Current Airport Layout Plan (ALP)

- Refined to meet current FAA design standards

Long-Term Terminal and Gates Expansion Area

Runway 19L Extension

Third Parallel Runway

Taxiway G Extension
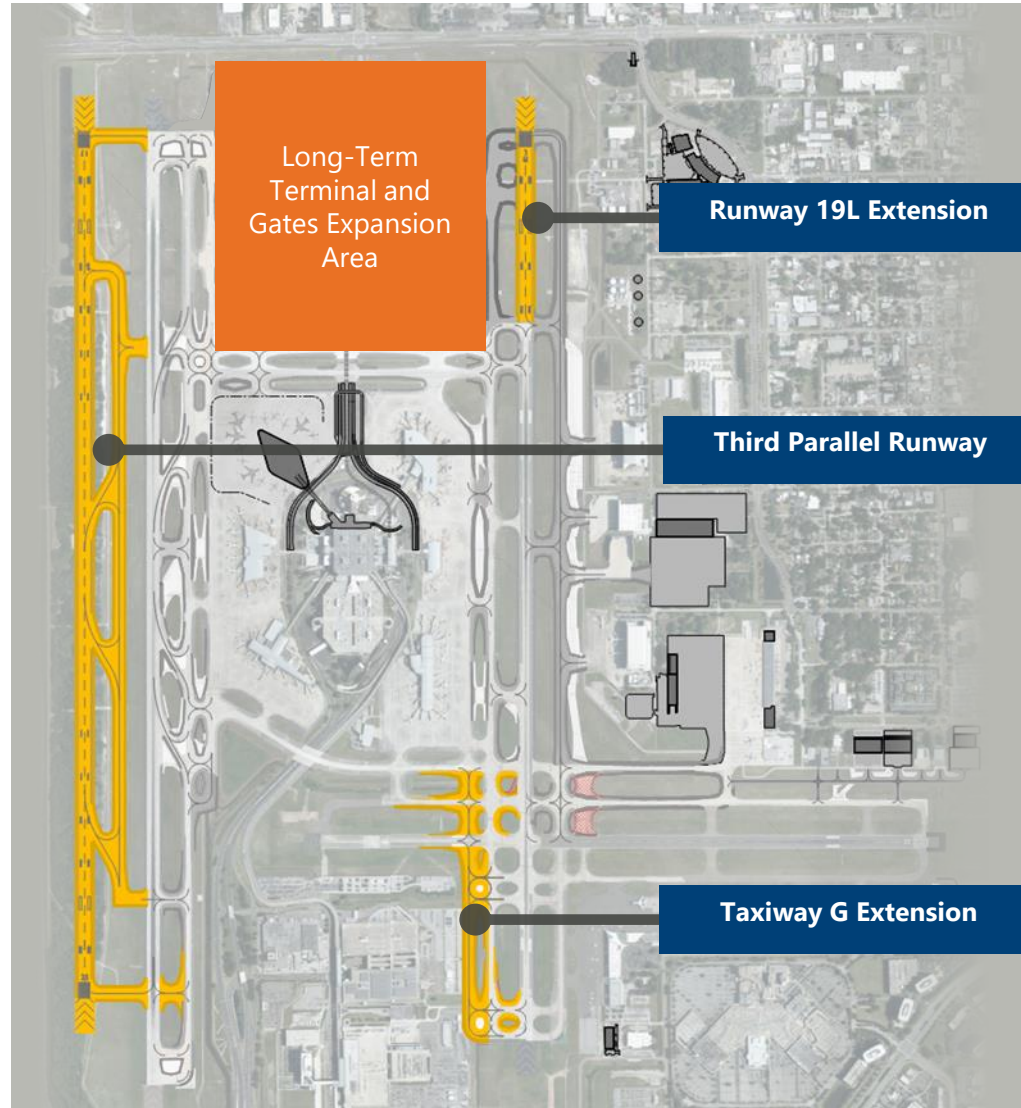
Evolving Technology – Advanced Air Mobility
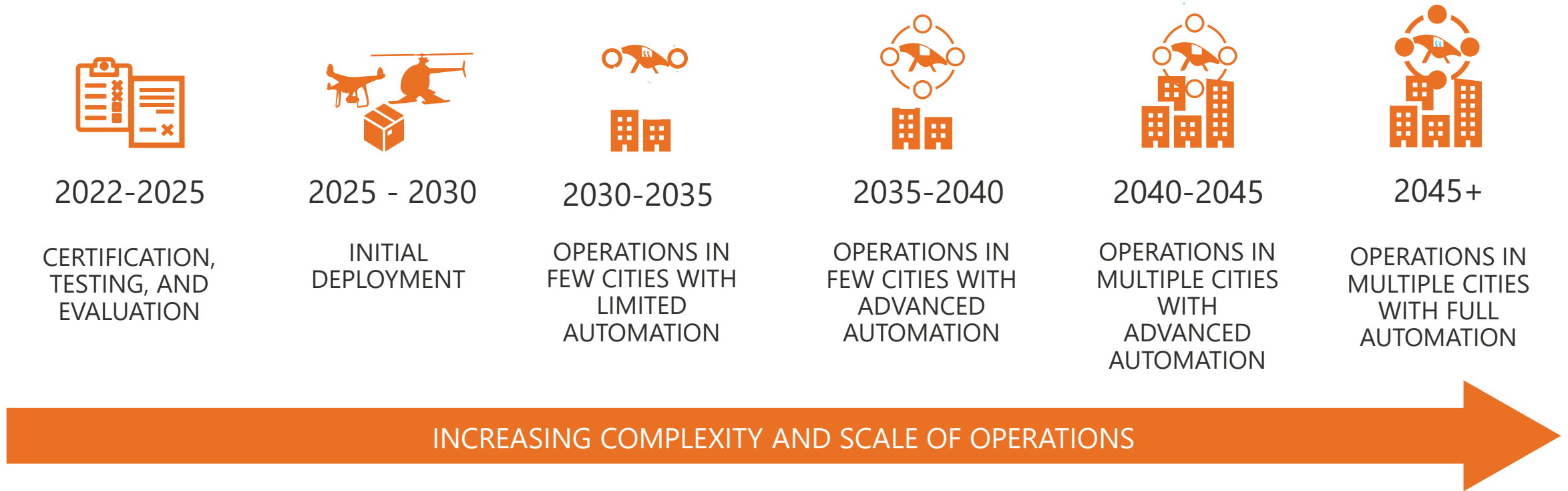
Advanced Air Mobility (AAM)

Rapid evolution of eVTOLs has led to the concept of AAM

" **Advanced Air Mobility (AAM)** is defined as a safe and efficient aviation transportation system that will operate highly automated aircraft to transport passenger and cargo in urban and regional environments. Other uses include public services, and private / recreational operations. – **FAA** "

City to City

Within City

Suburb to City

City to Suburb

SOURCES: Federal Aviation Administration, https://www.faa.gov/uas/advanced_operations/urban_air_mobility (accessed March 17, 2022); Vertical Flight Society, https://vtol.org/news/press-release-vfs-electric-vtol-directory-hits-600-concepts (accessed March 17, 2022).

Advanced Air Mobility Implementation Timeline

2022-2025
CERTIFICATION, TESTING, AND EVALUATION

2025 - 2030
INITIAL DEPLOYMENT

2030-2035
OPERATIONS IN FEW CITIES WITH LIMITED AUTOMATION

2035-2040
OPERATIONS IN FEW CITIES WITH ADVANCED AUTOMATION

2040-2045
OPERATIONS IN MULTIPLE CITIES WITH ADVANCED AUTOMATION

2045+
OPERATIONS IN MULTIPLE CITIES WITH FULL AUTOMATION

INCREASING COMPLEXITY AND SCALE OF OPERATIONS

SOURCE:
Adapted from Advanced Air Mobility, Deloitte, January 2021 https://www2.deloitte.com/us/en/insights/industry/aerospace-defense/advanced-air-mobility.html

Potential AAM Sites

1. Intersection of W. Tampa Bay Blvd. and Airport Service Road ✓

2. Intersection of Jim Walter Blvd. and W. Columbus Dr. ✓

3. South of W. Dr. Martin Luther King Jr. Blvd. ✗

4. North of Ohio Avenue ✗

5. North Terminal Parking Garage ✗

6. Long-Term Parking Garage ✗
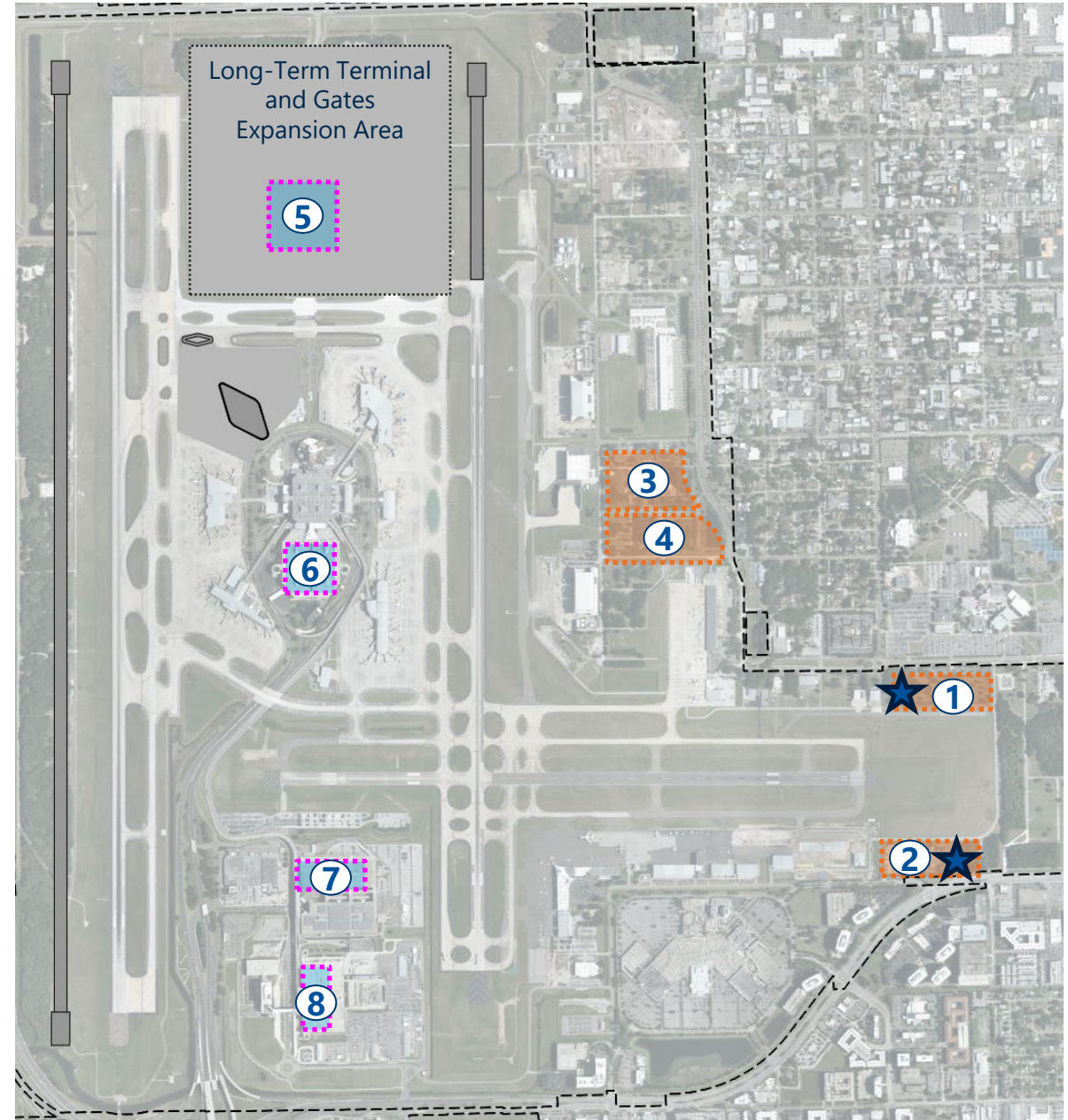
7. Economy Parking Garage ✗

8. Rental Car Center ✗

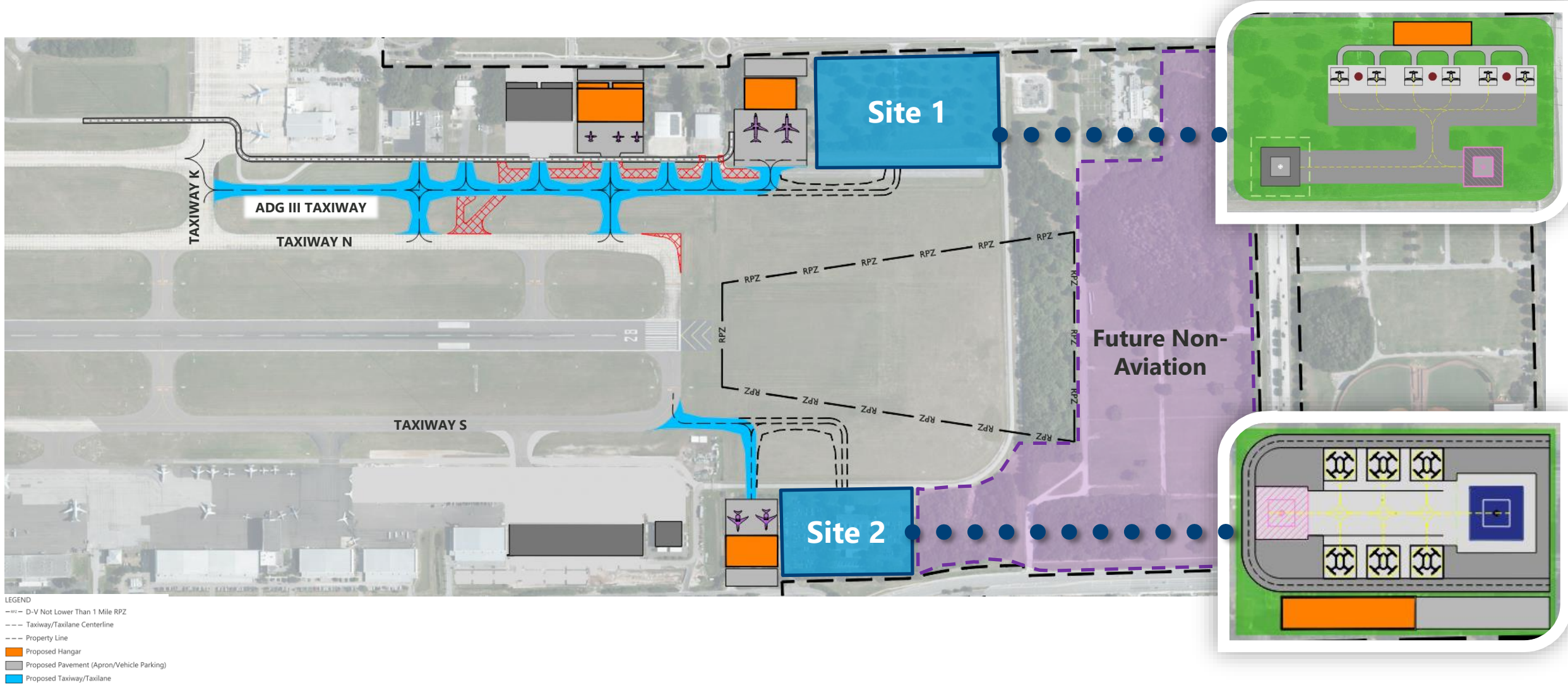**Legend:**

- Passenger Transport (Airport Transfer)
- Passenger Transport (Air Taxi) or Air Cargo
- ★ Preferred Site

Preferred Advanced Air Mobility Sites

LEGEND
- –RPZ– D-V Not Lower Than 1 Mile RPZ
- – – – Taxiway/Taxilane Centerline
- – – – Property Line
- ▮ Proposed Hangar
- ▮ Proposed Pavement (Apron/Vehicle Parking)
- ▮ Proposed Taxiway/Taxilane

Questions and Discussion

Next Steps

2022 TPA Master Plan Update Webpage/Feedback Form

- Finalize Capital Improvement Program (includes cost estimating for the recommended improvements)

- Submit Airport Layout Plan (ALP) Drawing Set to the Federal Aviation Administration

- Complete Final Documentation

tampaairport.com/master-plan/2022-update