

# MSP Airport Long Term Plan Stakeholder Advisory Panel

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Meeting #4  
December 10, 2021

# Meeting Agenda

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## Emerging from the Pandemic

*Roy Fuhrmann, COO*

## Recap and Reconnect

*Dana Nelson, Director of Stakeholder Engagement*

## Update from MAC's Airport Planner

*Lydia Werner, MAC Airport Planner*

## MSP Airport Forecast Update

*Jeff Stanley, Ricondo and Associates*

## Panel Discussion

*What adjustments to long-term airport facility planning should be considered in light of the pandemic?*



# Emerging from the Pandemic



Roy Fuhrmann  
Chief Operating Officer

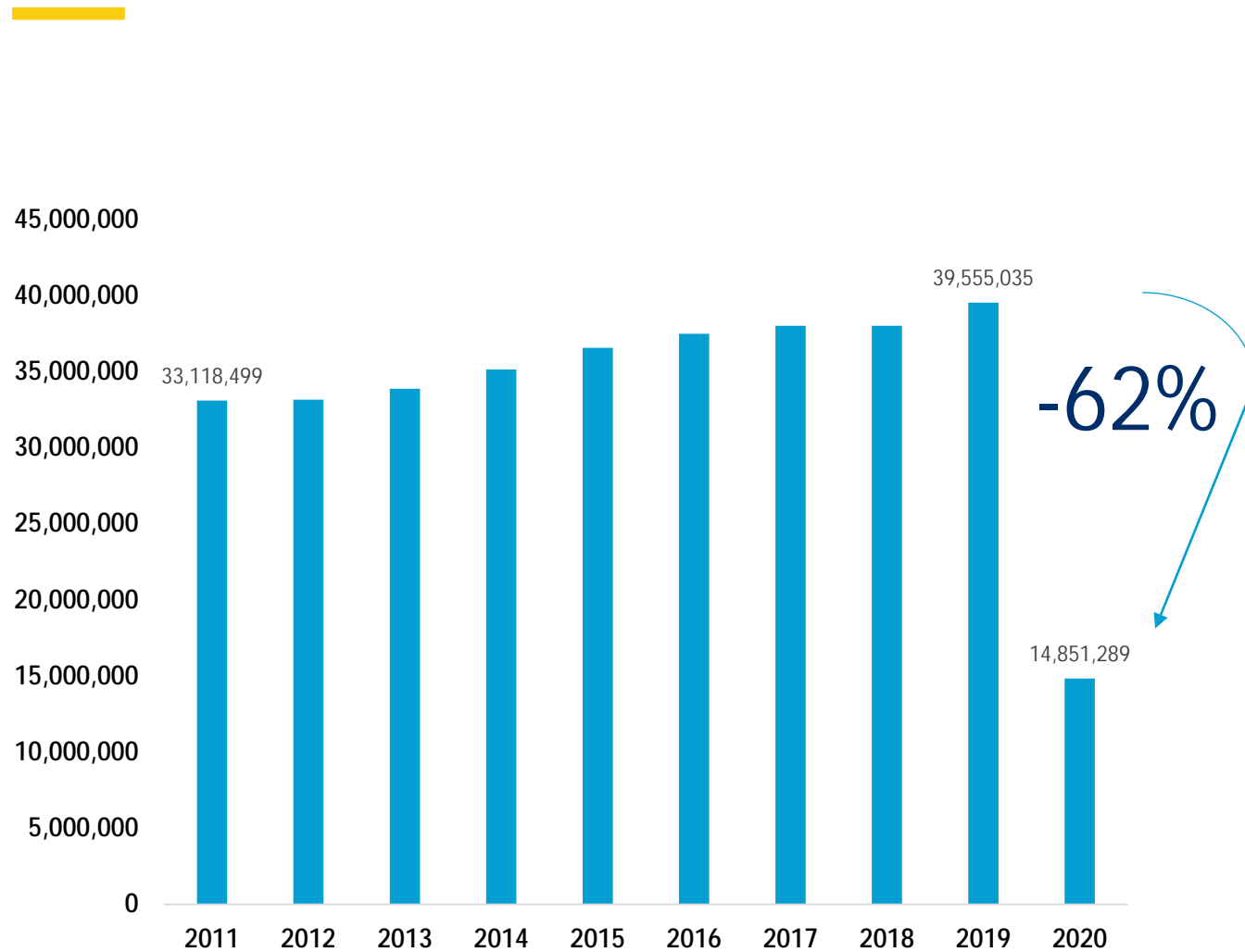


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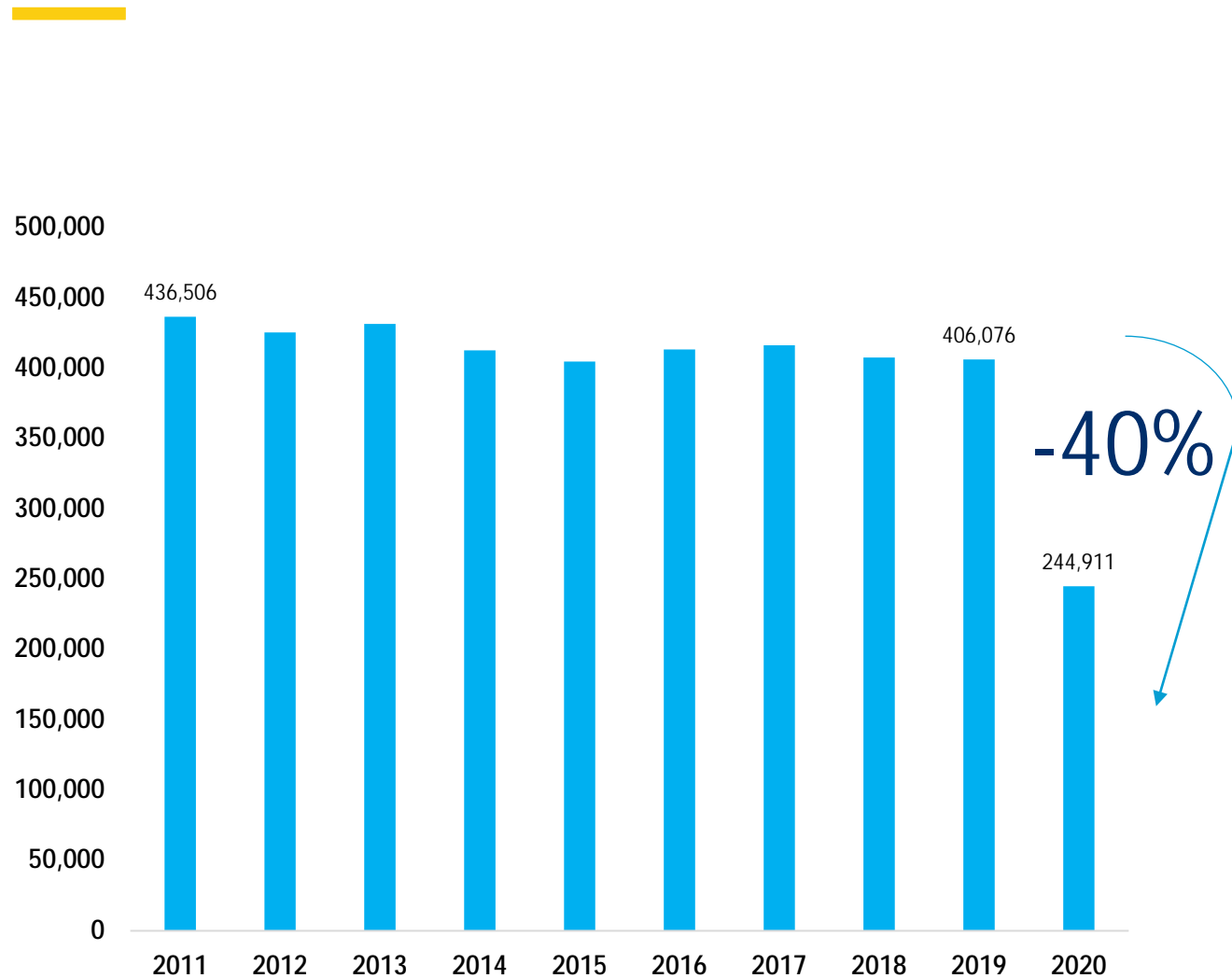


# COVID Impacts

# 2020 MSP Passenger Activity



# 2020 MSP Operations Activity





# Pandemic - Industry Impact

- U.S. airports = losses of \$40 billion  
March 2020-March 2022
- MAC losses = \$215-\$220 million in 2020
- MAC projected revenue decline of \$93 million in 2021



# Pandemic - Relief and Partner Support

## **CARES ACT + Coronavirus Response and Relief Supplemental Grants**

- MSP - \$158 million allocated to date
- Other MAC airports - \$678,000 allocated to date

## **American Rescue Plan Act of 2021 Grant**

- MSP- \$118 million
- MSP concessions- \$16.4 million
- Other MAC airports - \$621,000

## **Relief for our Partners**

- Airlines - \$68 Million
- Concessions, auto rental and passenger services businesses - \$35 million





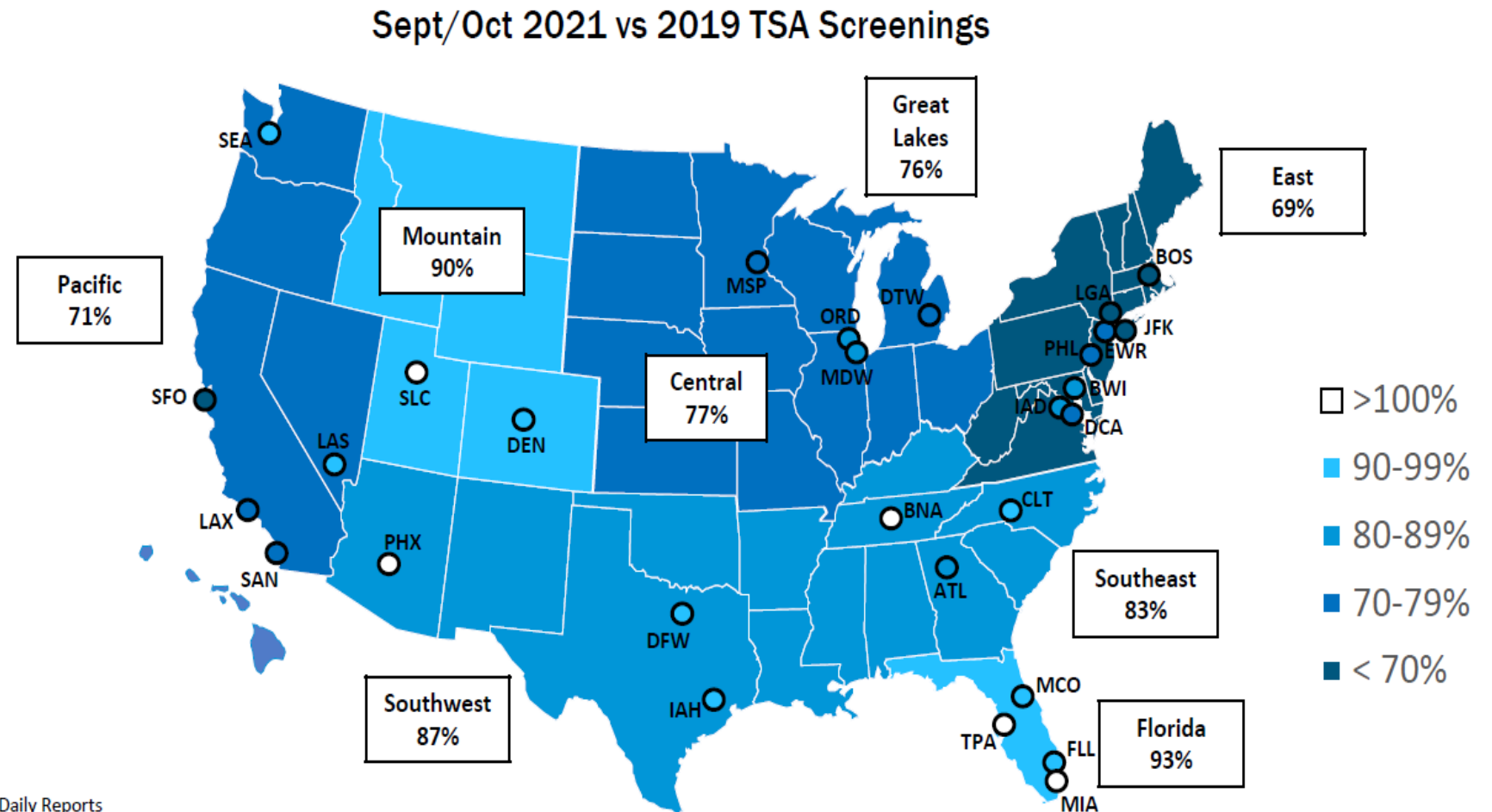
# Pandemic – Federal Infrastructure Deal



- \$20 billion for airports over 5 years
- AIP entitlement formula funding= \$3 billion/year.
  - / MSP would receive an estimated \$37.5 million in FFY2022 and FFY2023 with future enplanements determining funding in years 2024 to 2026
  - / Projects must be PFC eligible and subject to local matching share of 25%
- GA airports would share \$520 million in funds based on projects included in FAA NPIAS
- Terminal Development Projects = \$1 billion/year
  - / MSP can compete for funding to replace aging infrastructure, increase ADA compliance or improve energy efficiency.
  - / Amounts subject to local matching share of 20%

# Pandemic – Uneven Passenger Recovery

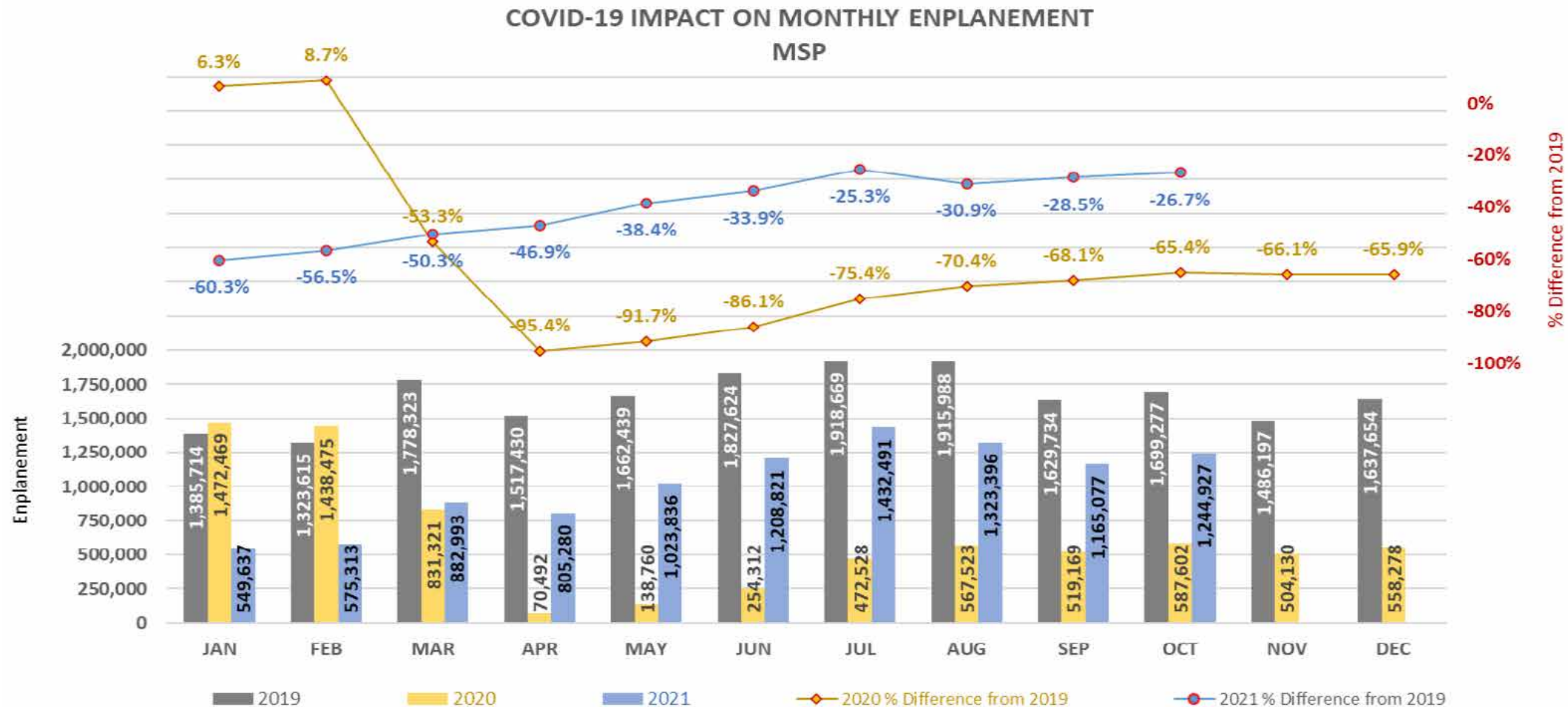
- All regions of US Now Recovering
- Easing of international entry restrictions into U.S. in November
- Business passenger recovery closing gap on leisure sector
- Recovery depends on mix of leisure/business or domestic/int'l service



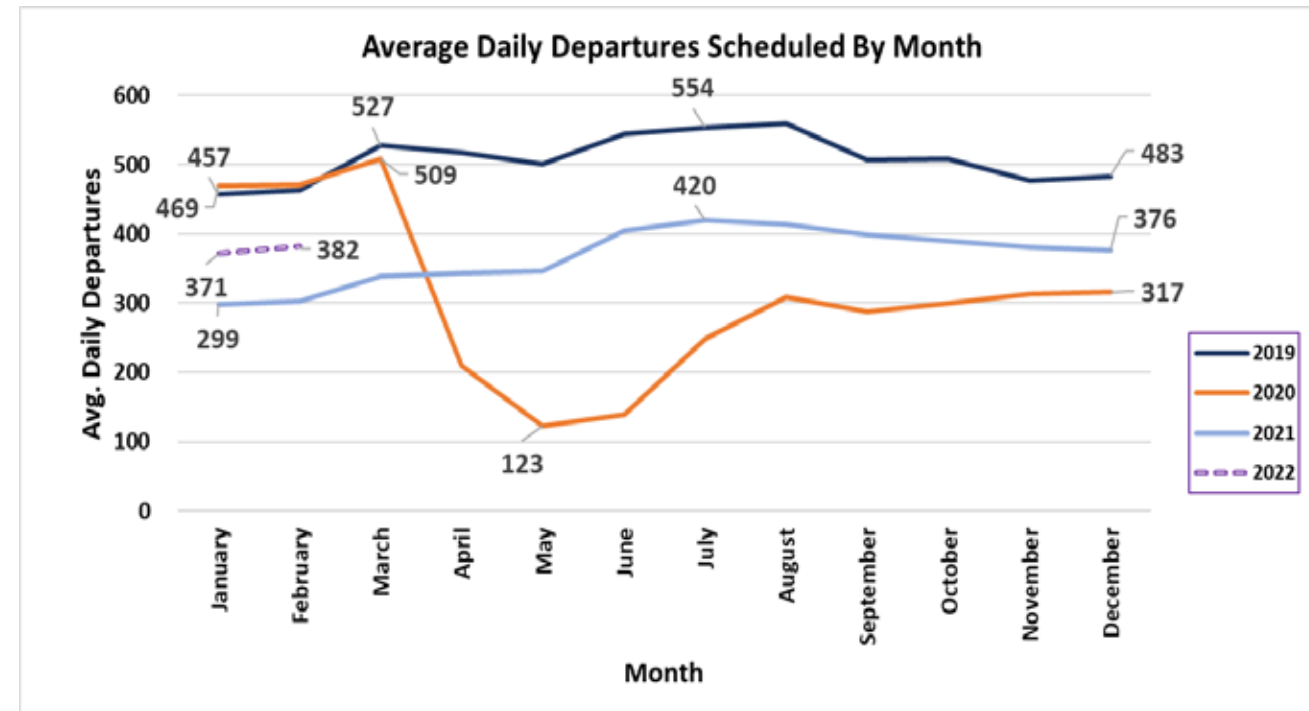
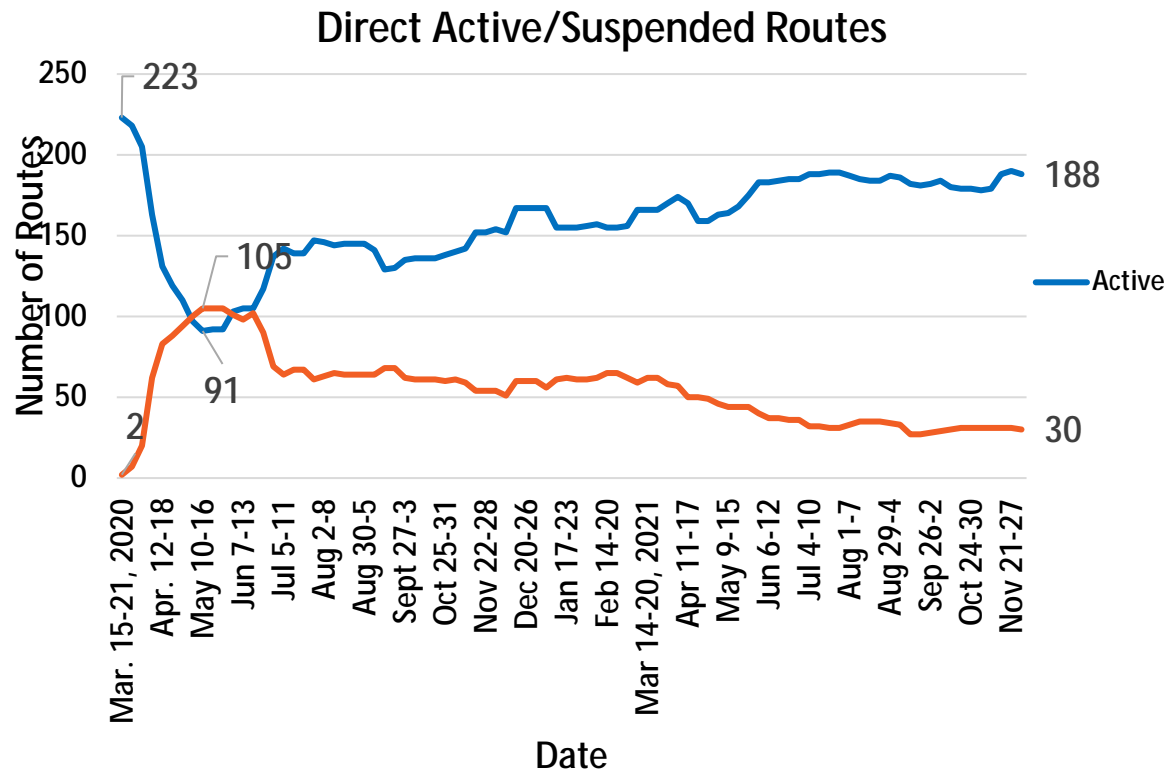
Source: TSA Daily Reports



# Pandemic Recovery - Enplanements



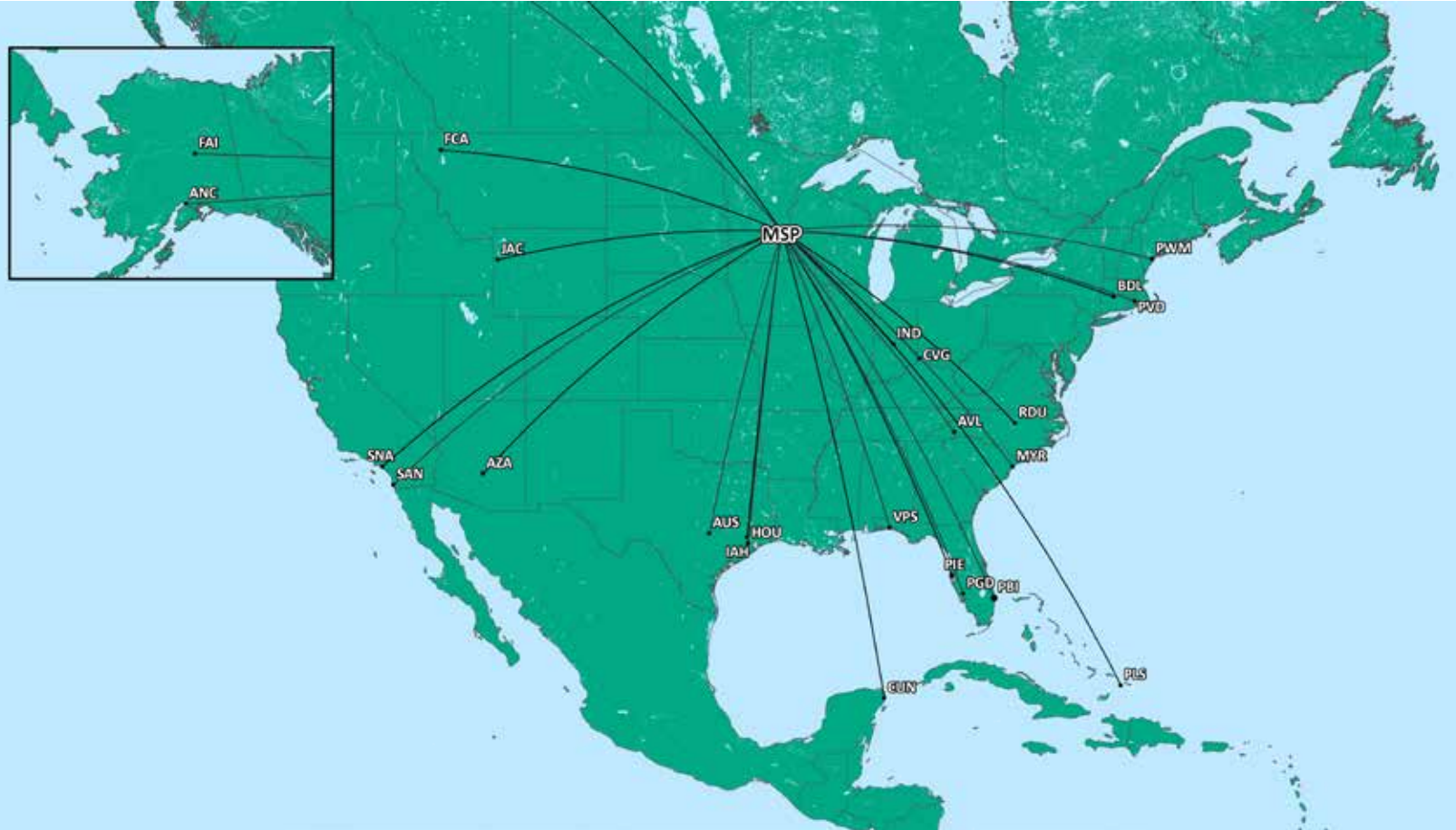
# Pandemic Recovery - Routes





# Air Service Recovery

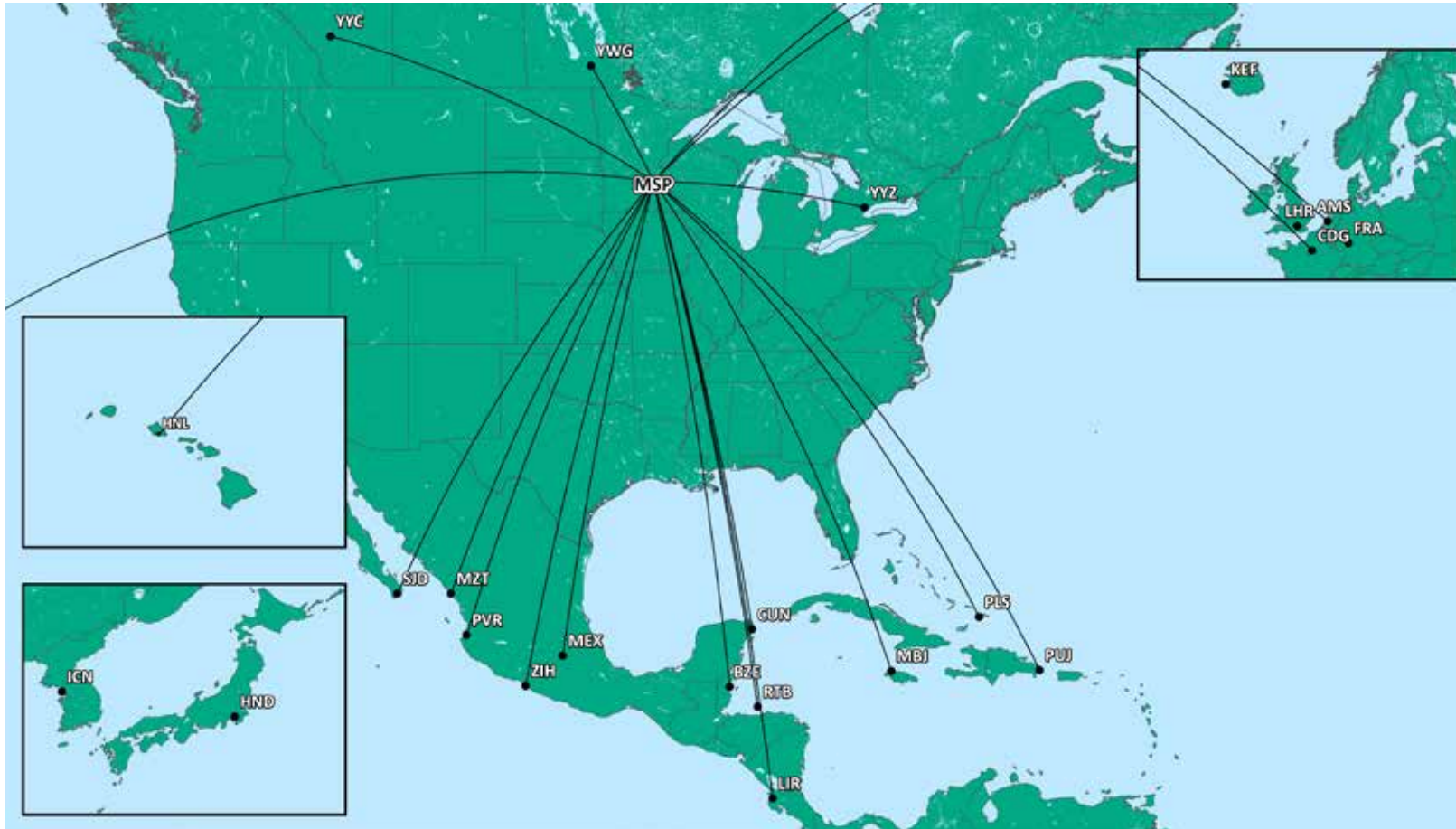
27 NEW  
DOMESTIC  
ROUTES IN  
2021



90% of  
Domestic  
Routes  
Recovered

# Air Service Recovery

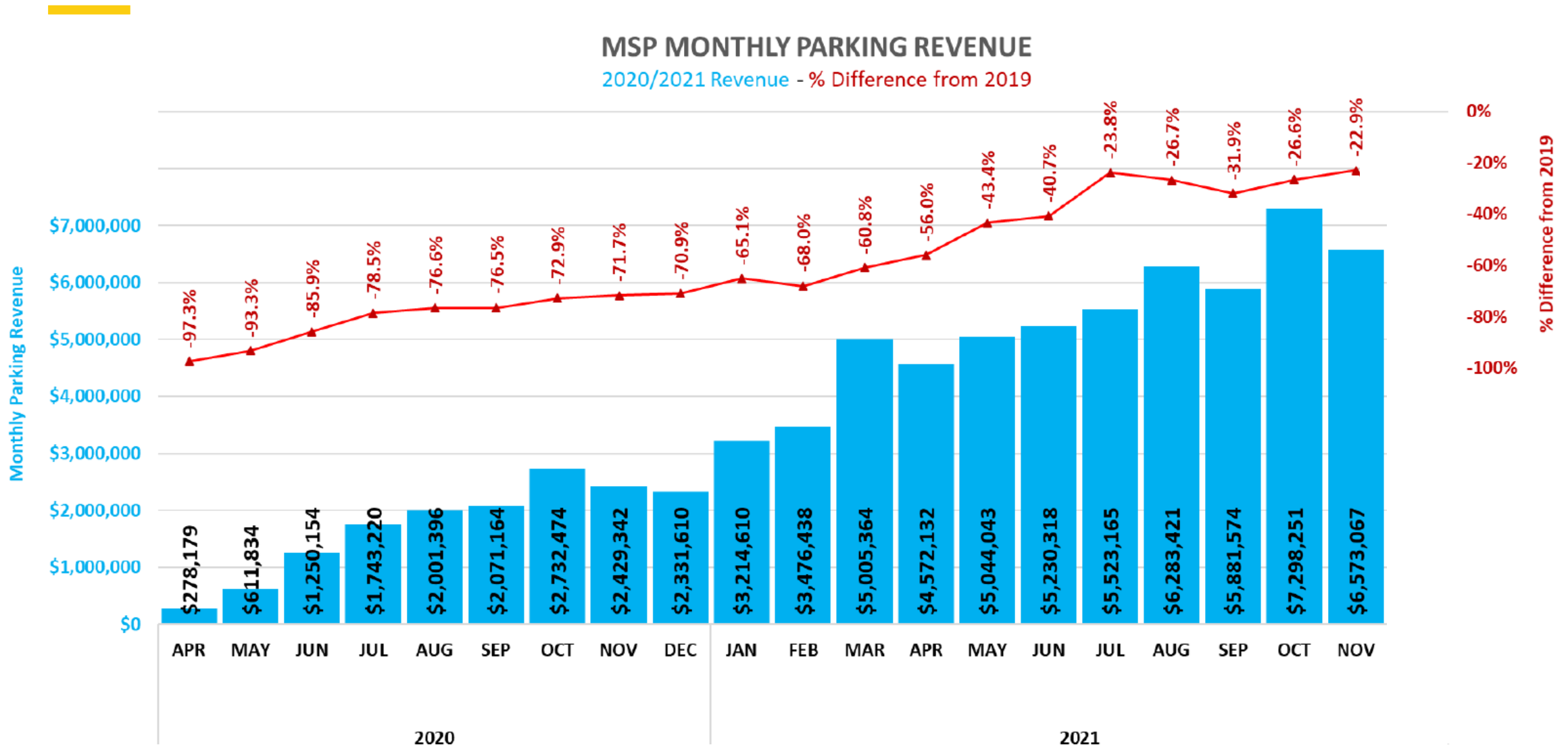
66% of  
International  
Routes  
Recovered in  
2021.



**WINTER  
INTERNATIONAL  
SERVICE**



# Pandemic - Parking



# Pandemic - Concessions

131 Total Units

83% of Venues  
Open

18% Full Hours



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TRAVEL  CONFIDENTLY **m**sp

# Health Safety Program





Robust Cleaning



Hand Sanitizing



Face Covering



Social Distancing



Shields



Touchless Parking

## Face Mask Regulations Update

- TSA security directive requires face coverings to be worn inside airports, on aircraft and on other modes of transportation.
- Enforcement of federal mask regulations extended through March 2022.





## Best-in-Class Cleaning/Infectious Disease Prevention

GBAC Star™ Program

ACI Airport Health Accreditation Program

- Minimize the spread of COVID-19 and combat future health threats
- Require the highest standards of facility cleanliness, safety and operational measures
- Consistent global standards build consumer confidence in airport health safety to help push for sustained recovery in air travel.



# COVID-19 Testing & Vaccines

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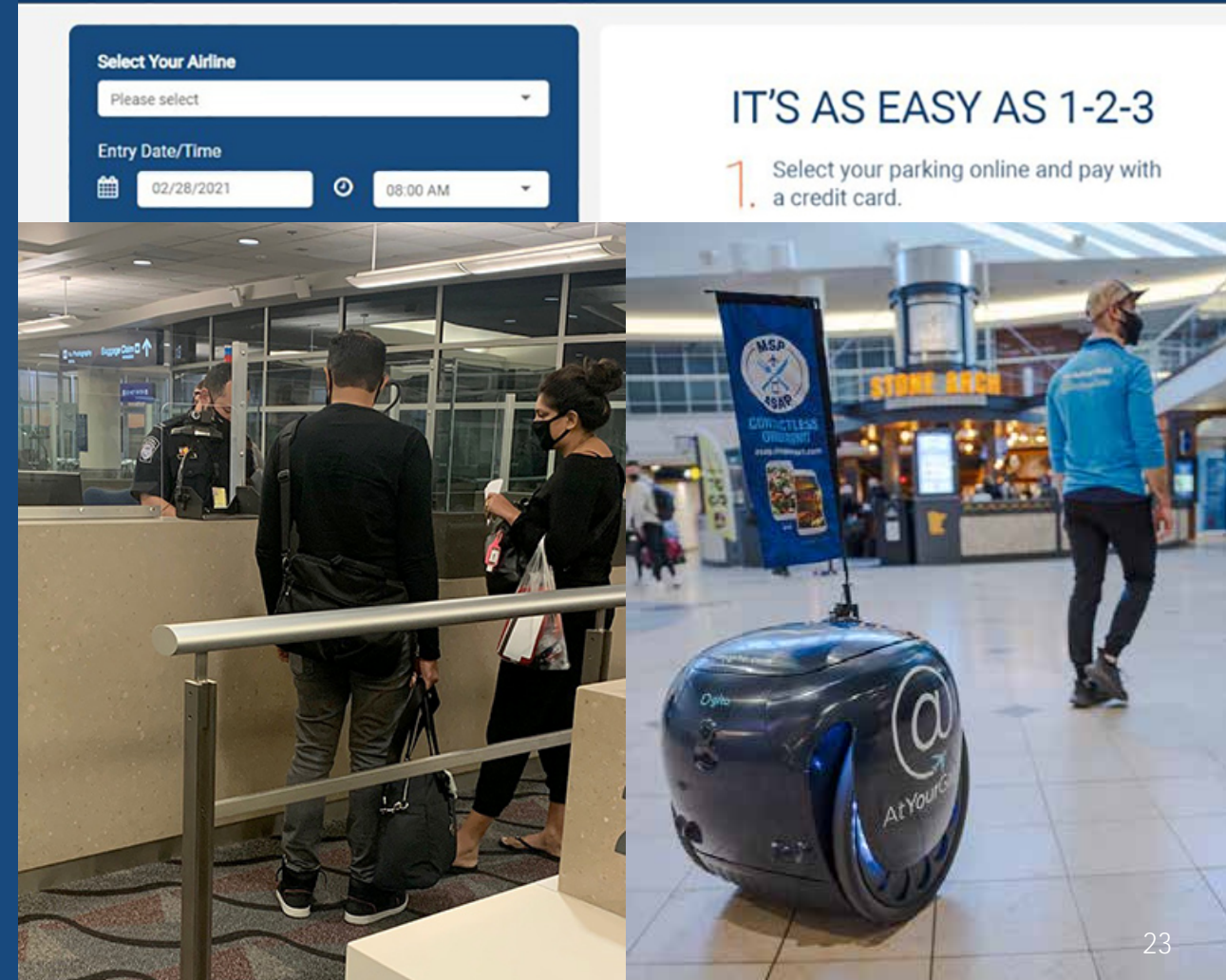
- MDH COVID-19 Saliva Test Site at MSP
- MSP Terminal 1 COVID-19 Wandertest rapid-testing site opened for passengers
- MN vaccination sites open at Terminal 1 and Terminal 2. Appointments via Minnesota Vaccine Connector: [vaccineconnector.mn.gov](https://vaccineconnector.mn.gov)

# Toward a Touchless Journey

- Pre-booked Parking
  - / Online reservation system
  - / Customers receive confirmation email with a QR code used to enter and exit parking
- Simplified Arrival
  - / Introduced at MSP in January
  - / Streamlines process of re-entering the country
- MSP ASAP
  - / One-stop online ordering for food pick up or delivery: [asap.mspairport.com](https://asap.mspairport.com)

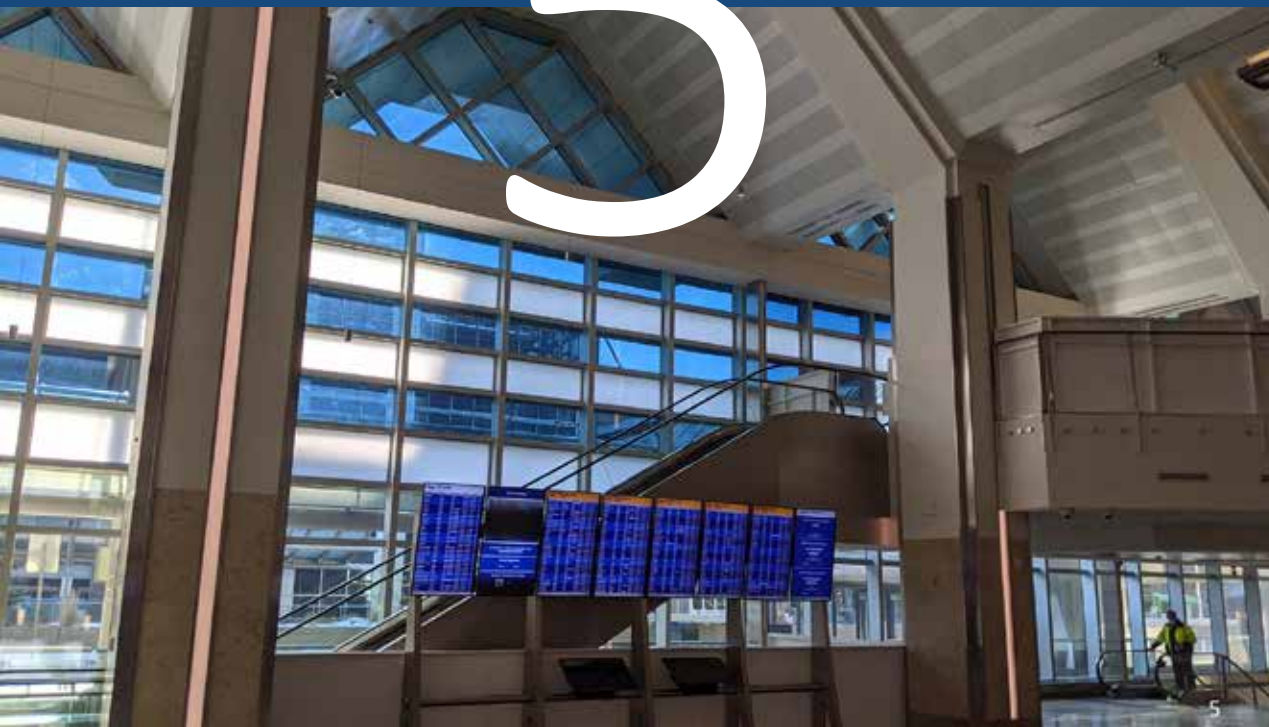
## Prebooked Parking

NEW! Purchase your parking online before you arrive. When you prebook, you don't have to worry about getting a spot. You're guaranteed a place to park.



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# Reimagining Success





# Terminal 1 Roadway, Ground Transportation and Parking





# Terminal 1 Ticketing and Baggage Claim





# G Concourse Expansion & Delta Skyclub







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## A Commitment to Excellence

# Globally Recognized for Customer Service

- ACI Director General's Roll of Excellence
  - / MSP was one of only seven airports worldwide to receive the Roll of Excellence recognition.
- The ASQ program surveys travelers at 300 airports around the world.
  - / MSP was named the Best Airport in North America for four straight years.



# Digital Airport Index North America 2021

**mssp**™ #1

- Connectivity
- Social Service and Automation
- Website
- Interactive Maps
- Digital Wayfinding
- Commerce
- Social Media
- Data



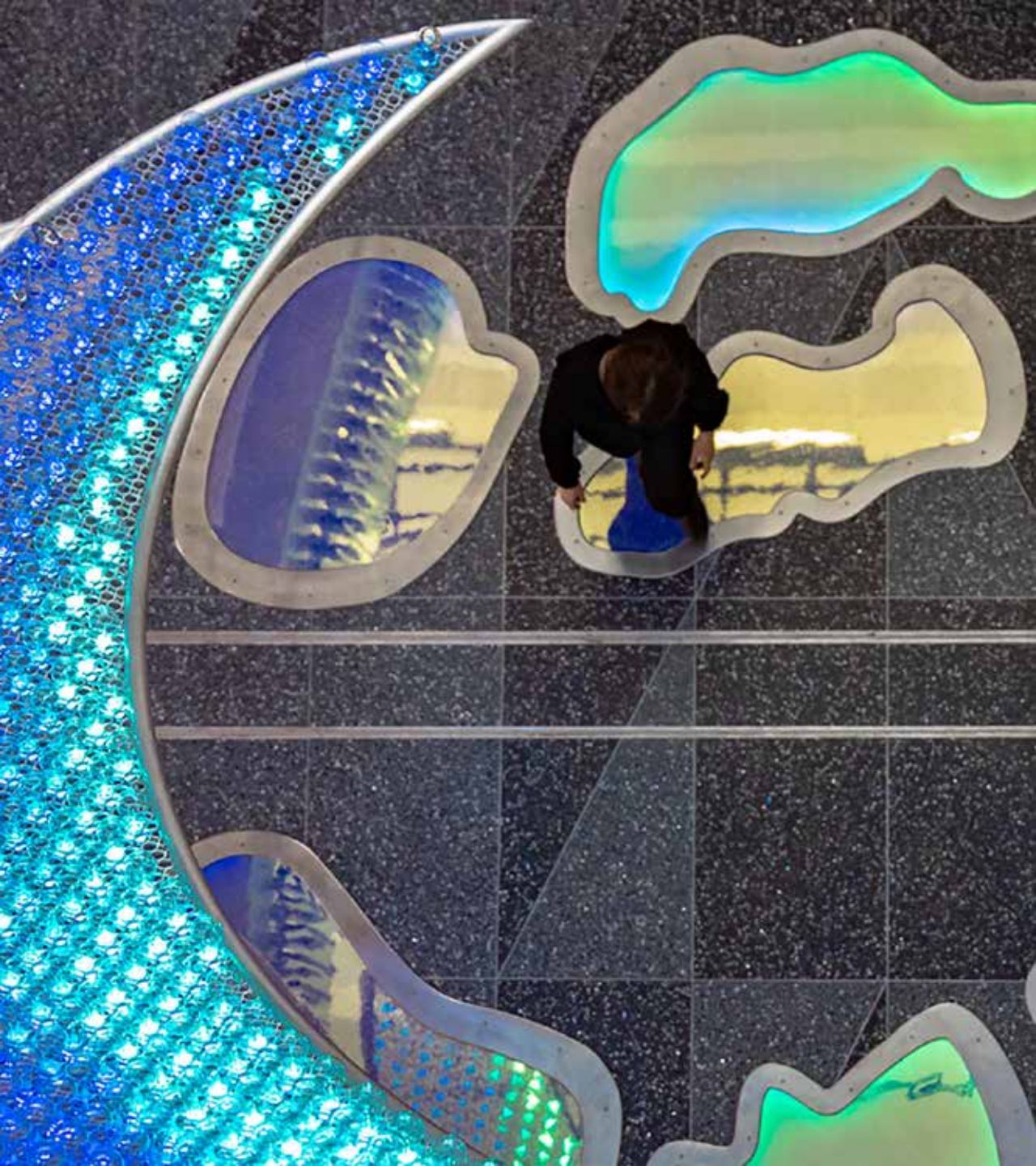


# Most Efficient Airport Award

- ATRS Annual Benchmarking Awards
- Most Efficient in North America, 25-40 million passenger category
- Only 12 Airports recognized globally this year
- Commitment to safe and efficient operations
- 4<sup>th</sup> Award in five years







mspairport.com



Important Travel Information:  
Per Federal Orders, face coverings are required at U.S. airports.  
Learn more about our Travel Confidence program including COVID testing and travel requirements.



metroairports.org



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# Recap and Reconnect





# Stakeholder Advisory Panel

- / An advisory board representing major stakeholder groups that have an interest in the planning process.
- / The Panel serves several important functions, including:
  - § Representing a broad range of stakeholder groups;
  - § Receiving information about the planning process; and
  - § Communicating public concerns and aspirations as the voice of key stakeholders.



# Project Website

[mspairport.com/long-term-plan](https://mspairport.com/long-term-plan)

- Overview
- Community and Stakeholder Engagement
- Updated Progress and Schedule
- Documents and Links
  - Stakeholder Advisory Panel Report
  - Activity Forecast Executive Summary
- Frequently Asked Questions
- Contact Us





# Airport Planning Update



- The MSP LTP process began in 2019
- Inventory of MSP as well as Aviation Forecasts were completed before COVID pause
- Aviation forecasts were updated with actual 2020 numbers and a post-pandemic recovery period
- Consultants have been reengaged for remaining tasks
- Process should be complete by the end of 2022



# MSP 2040 LTP Forecast Update

- The Baseline MSP 2040 LTP Forecast was originally completed in late 2019
- The forecast has been updated for all activity segments (e.g., passenger, cargo, GA, military)
- Two scenarios have been explored for the short-term passenger recovery
- Baseline design day schedules (DDFS) have been revised



# Short-Term Considerations

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- Airline recovery trends at MSP and airports served from MSP
  - / Seat capacity
  - / Fleet changes
  - / Passenger loads
  - / Cargo volumes
  - / Influences of other hubs
- Economic recovery locally and in regions served from MSP
- Other industry forecasts
- Influence of non-traditional factors
  - / Border closures
  - / Willingness to travel
- Range of outcomes developed



# Recent MSP Performance

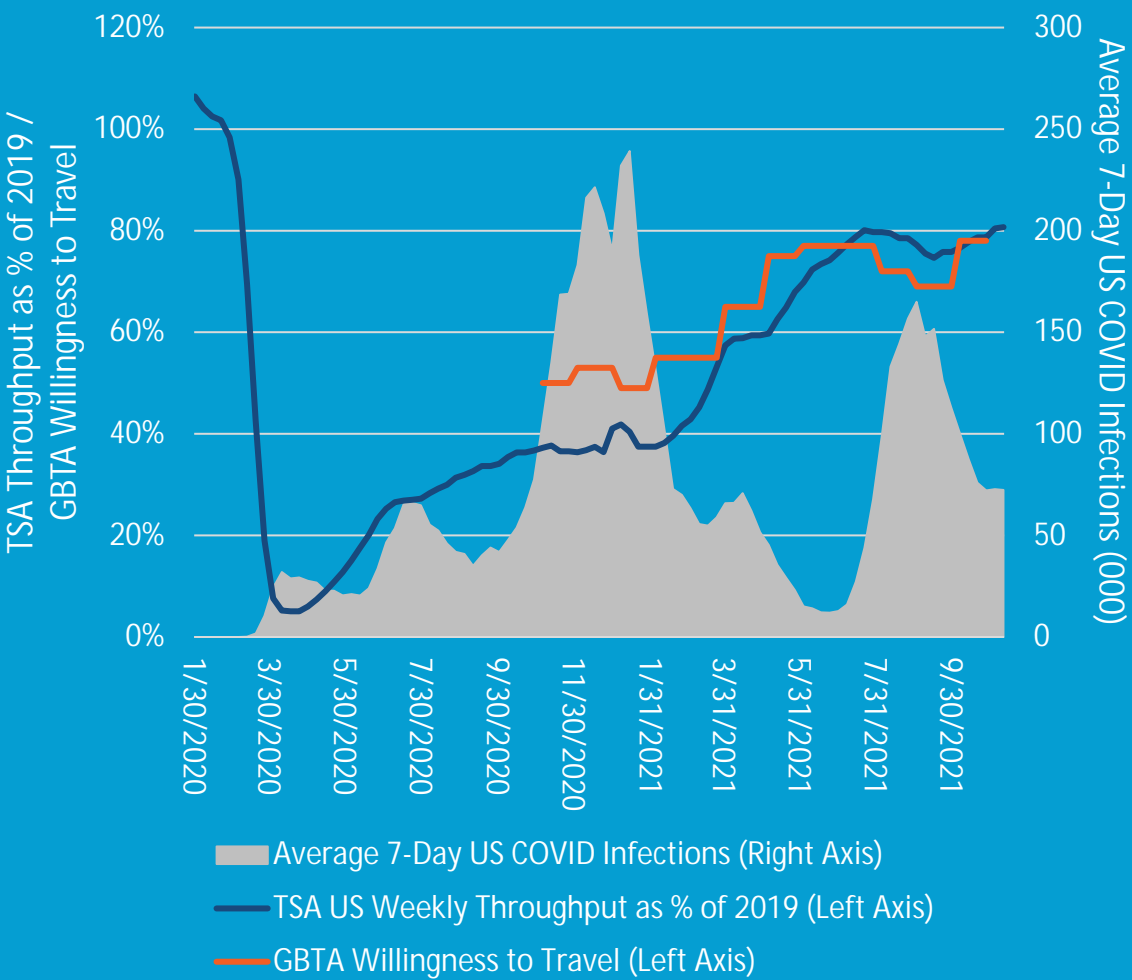
Airport Activity Metric	Year-to-Date <i>Jan-Oct</i> <i>2021 vs. 2019</i>	Latest 3 Months <i>Aug-Oct</i> <i>2021 vs. 2019</i>	Next 3 Months <i>Dec-Feb</i> <i>21/22 vs. 19/20</i>
Passengers	61%	71%	NA
Scheduled Seat Capacity	71%	76%	81%
Passenger Aircraft Operations*	72%	76%	78%
Total Aircraft Operations	74%	79%	NA
Cargo Volumes	100%	106%	NA

\* Passenger aircraft operations for next three months are as scheduled.  
Source: MAC Reports (actual); Diio mi (scheduled)





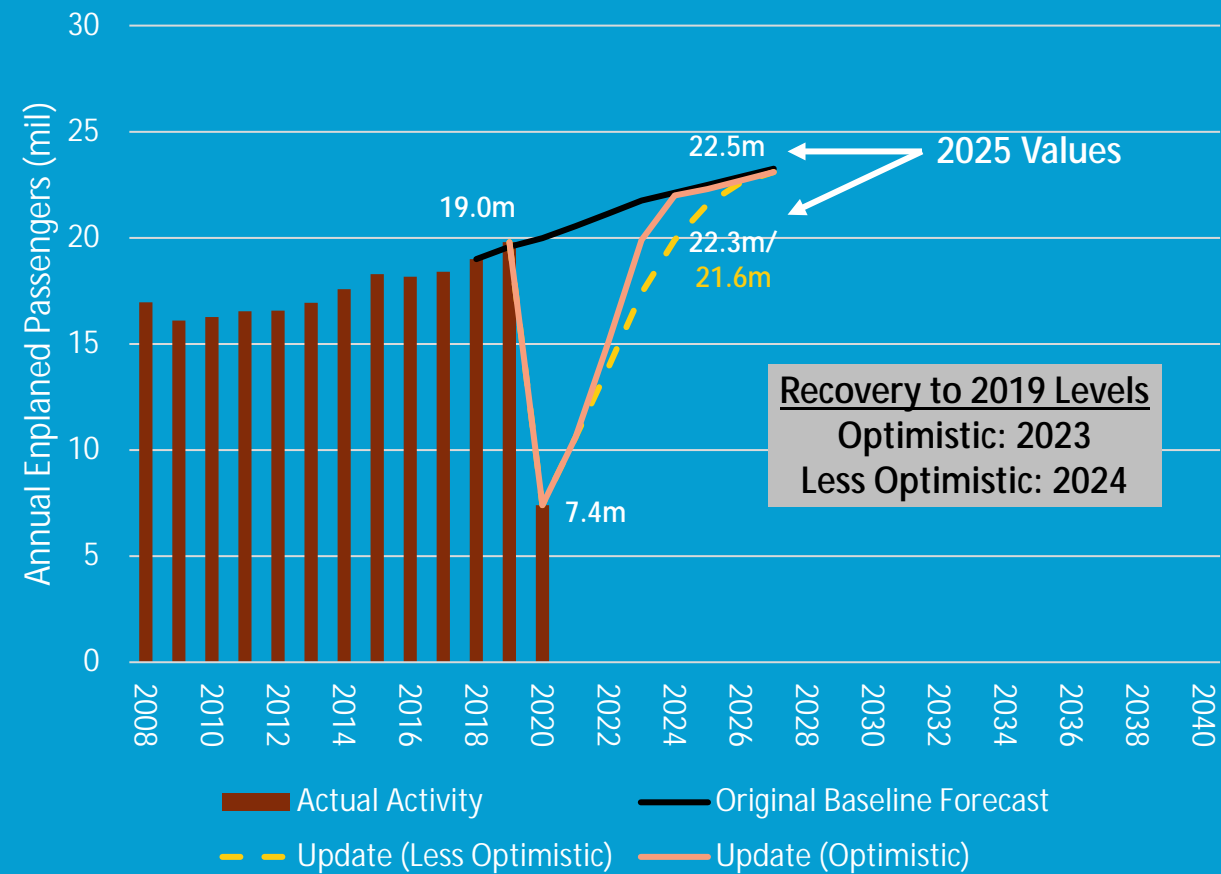
# US Industry Travel Trends



Sources: Transportation Security Administration (TSA) checkpoint reports; Global Business Travel Association Member COVID Poll (October 2021); Centers for Disease Control and Prevention



# Annual Enplaned Passenger Forecast (Short Term Only)



Source: MAC Reports (actual); Ricondo (forecast)





# Longer-Term Considerations

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- Economic recovery projected for MSP area and regions served from MSP
- Financial performance of airlines serving the Airport
- Changes to the airline industry hub network and competitive landscape
- Changes to the cargo market outlook
- Fleet announcements



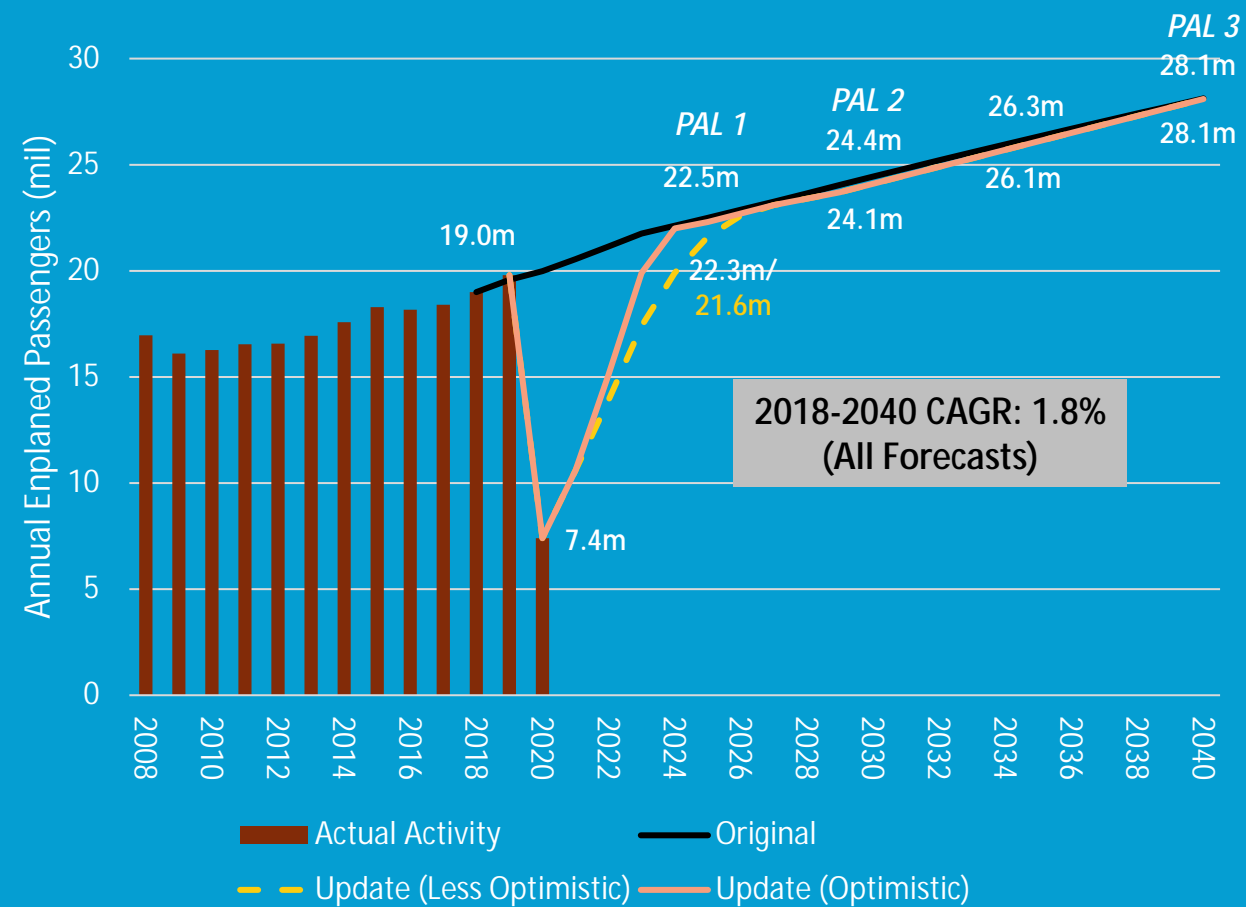
# Highlights

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- No major structural changes expected for the airline industry hub network
- Longer-term economic drivers are mostly unchanged or improved from prior outlook
- Fleet changes cause a slight increase in the forecast of average seat capacity and slight decrease in forecast passenger aircraft operations
- An uptick in the cargo volume forecast results in a slight increase in cargo aircraft operations

# Annual Enplaned Passenger Forecast



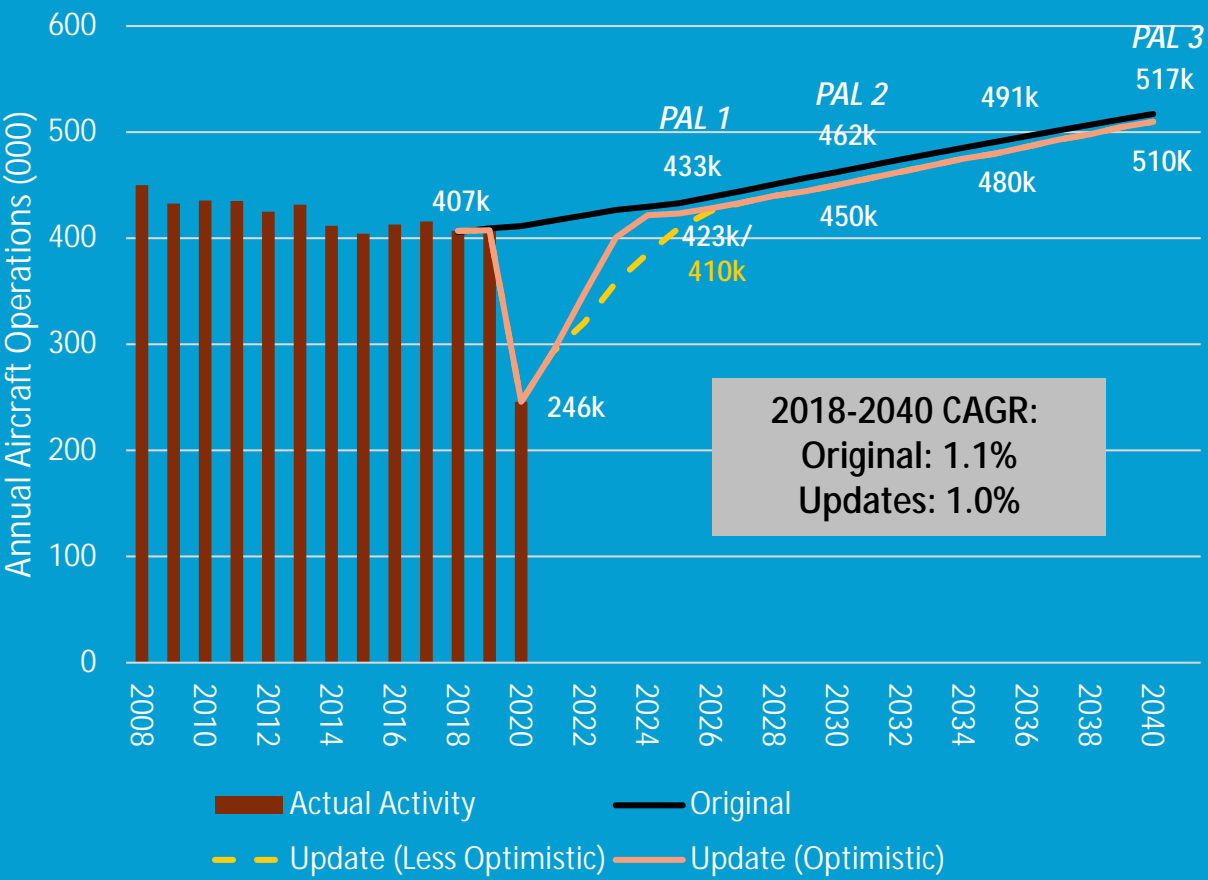
Source: MAC Reports (actual); Ricondo (forecast)







# Annual Aircraft Operations Forecast



Source: MAC Reports (actual); Ricondo (forecast)



# Planning Activity Level Years Achieved

Forecast of Enplaned Passengers

Planning Activity Level	Value	Original	Update (Less Optimistic)	Update (Optimistic)
PAL 1	22.5m	2025	2026	2026
PAL 2	24.4m	2030	2031	2031
PAL 3	28.1m	2040	2040	2040

Forecast of Total Aircraft Operations

Planning Activity Level	Value	Original	Update (Less Optimistic)	Update (Optimistic)
PAL 1	433k	2025	2027	2027
PAL 2	462k	2030	2032	2032
PAL 3	517k	2040	2042	2042







# Thank you

[MetroAirports.org](http://MetroAirports.org) [MSPAirport.com](http://MSPAirport.com)



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