

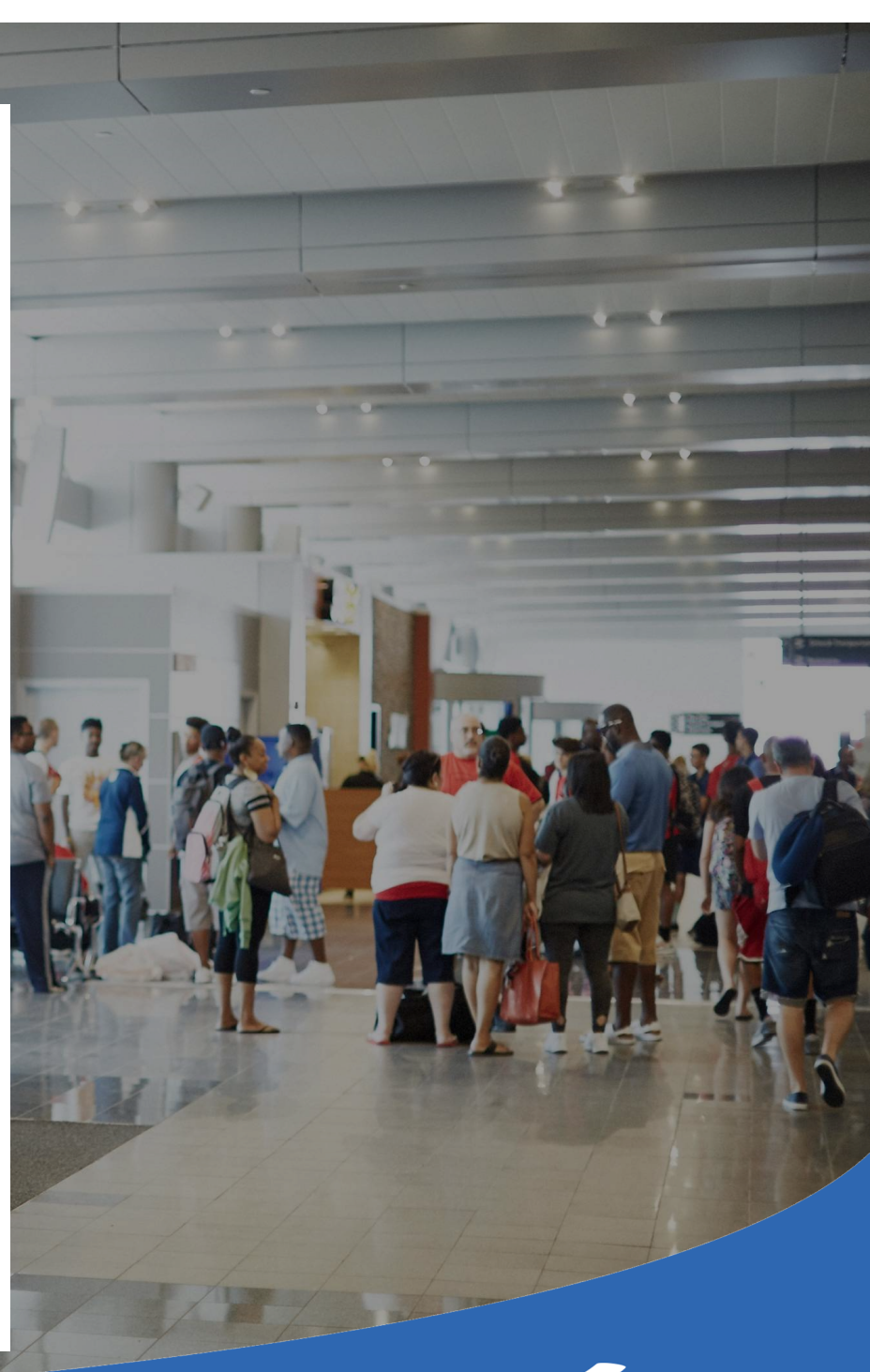
# **CLE – Master Plan Quarter Century Vision**

**Cleveland City Council  
Transportation Committee  
CLE Master Plan  
Wednesday August 5, 2020**

# Agenda

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- **CLE OVERVIEW**
- **Solid History**
- **Ever Changing Airport**
- **Strong Position**
- **Bright Future**
- **Close/Questions/Comments**



# CLE Overview

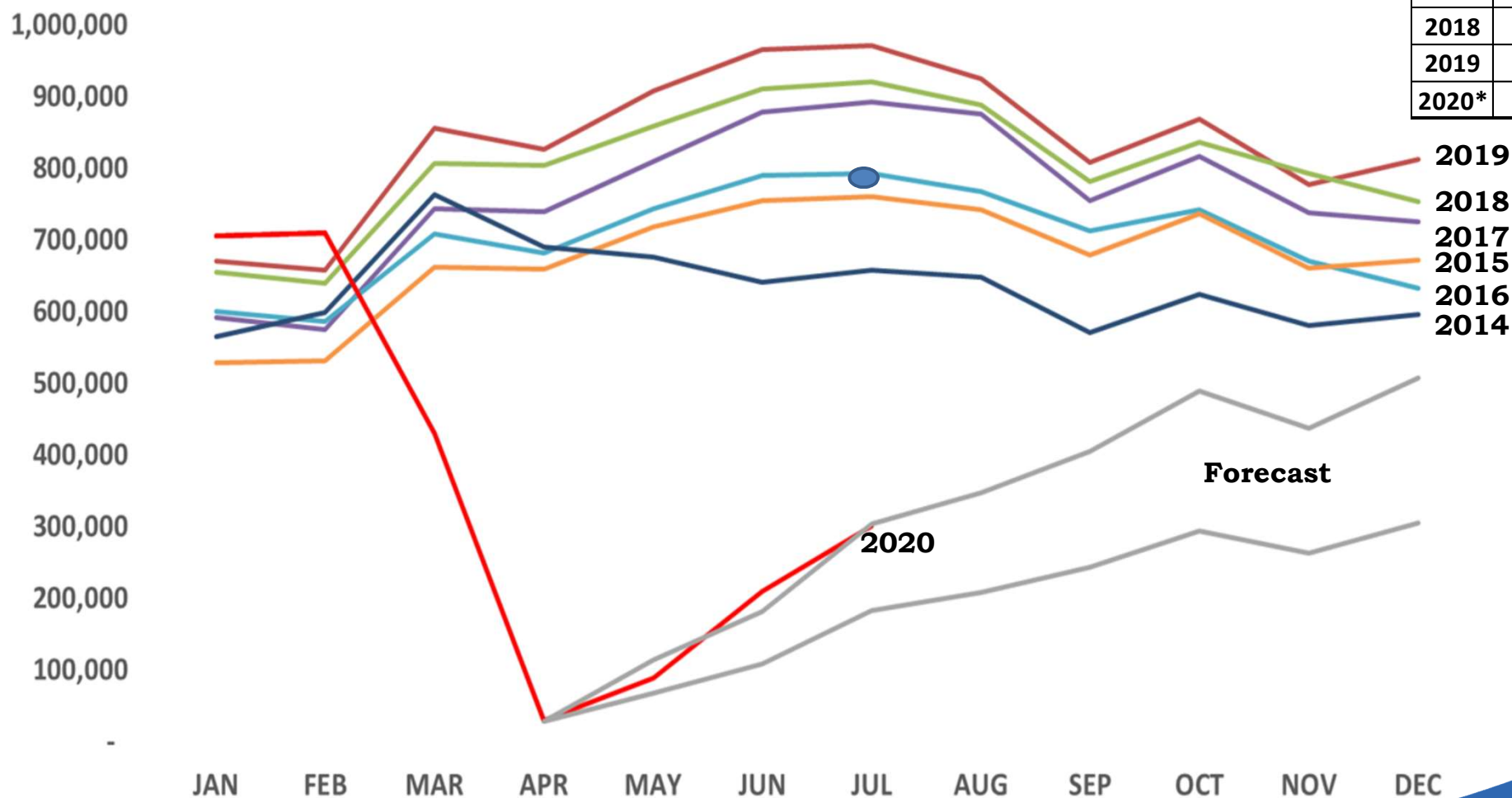
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2019		Forecast 2020 COVID-19
5,135,720	TSA Throughputs (Daily Average)	2,100,000
54,890	Landings (Daily Average)	22,500
10,040,817	Passengers (Annual)	4,097,679
11	Passenger Airlines	10
4	Cargo Airlines	4
460	City Airport Employees	460
7,500	Total Airport Employees	6,200

# Passenger History

## Traffic 2014 – July 2020

Passenger Traffic**	
2011	9,202,884
2012	9,010,473
2013	9,072,126
2014	7,609,404
2015	8,100,073
2016	8,422,676
2017	9,140,445
2018	9,642,732
2019	10,040,817
2020*	4,097,679



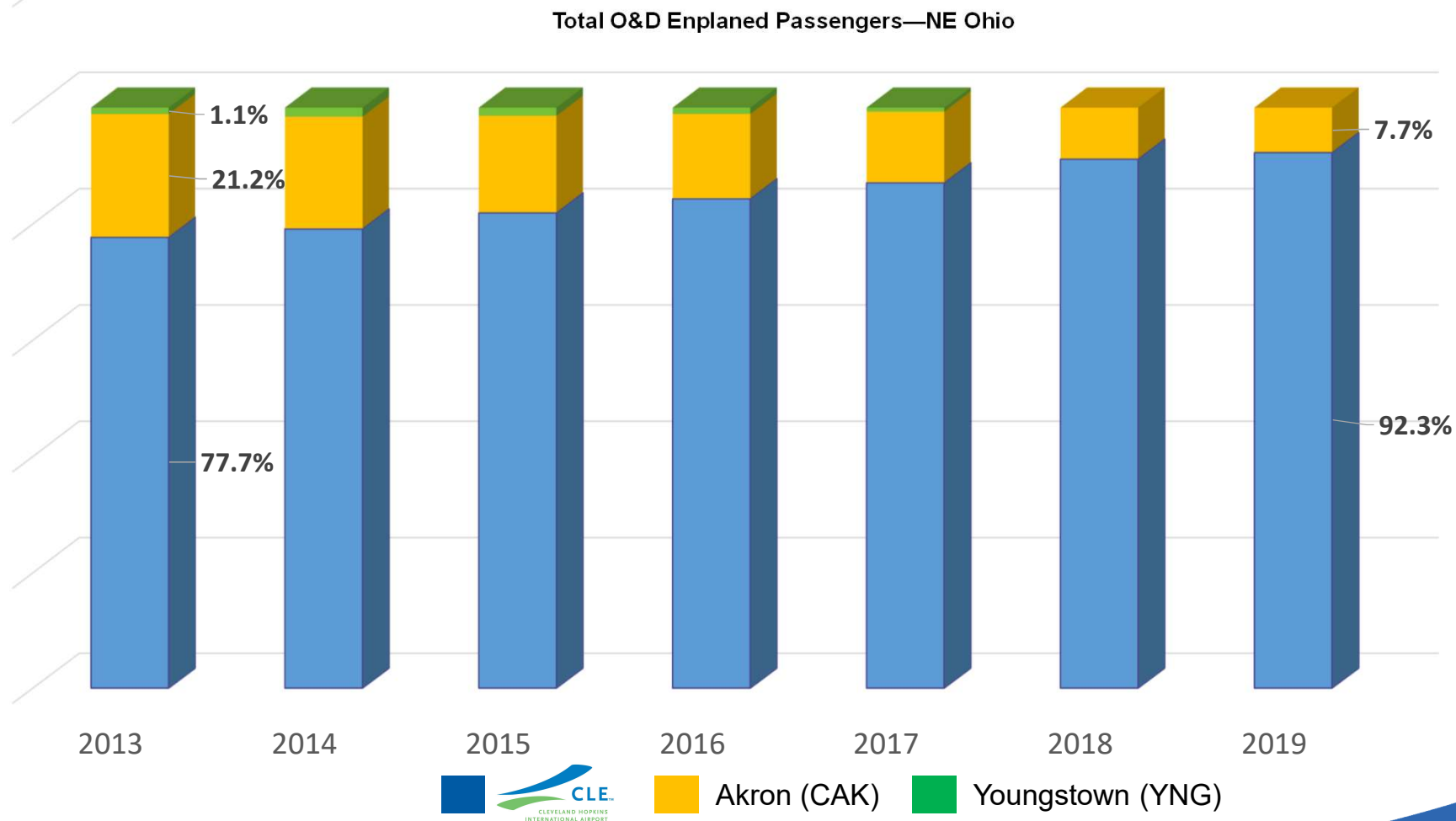
\* Forecast

\*\* Departing and Arriving Passengers

Source: Cleveland Hopkins International Airport

# Ever Changing Airport

## CLE consolidating NE Ohio O&D passenger demand

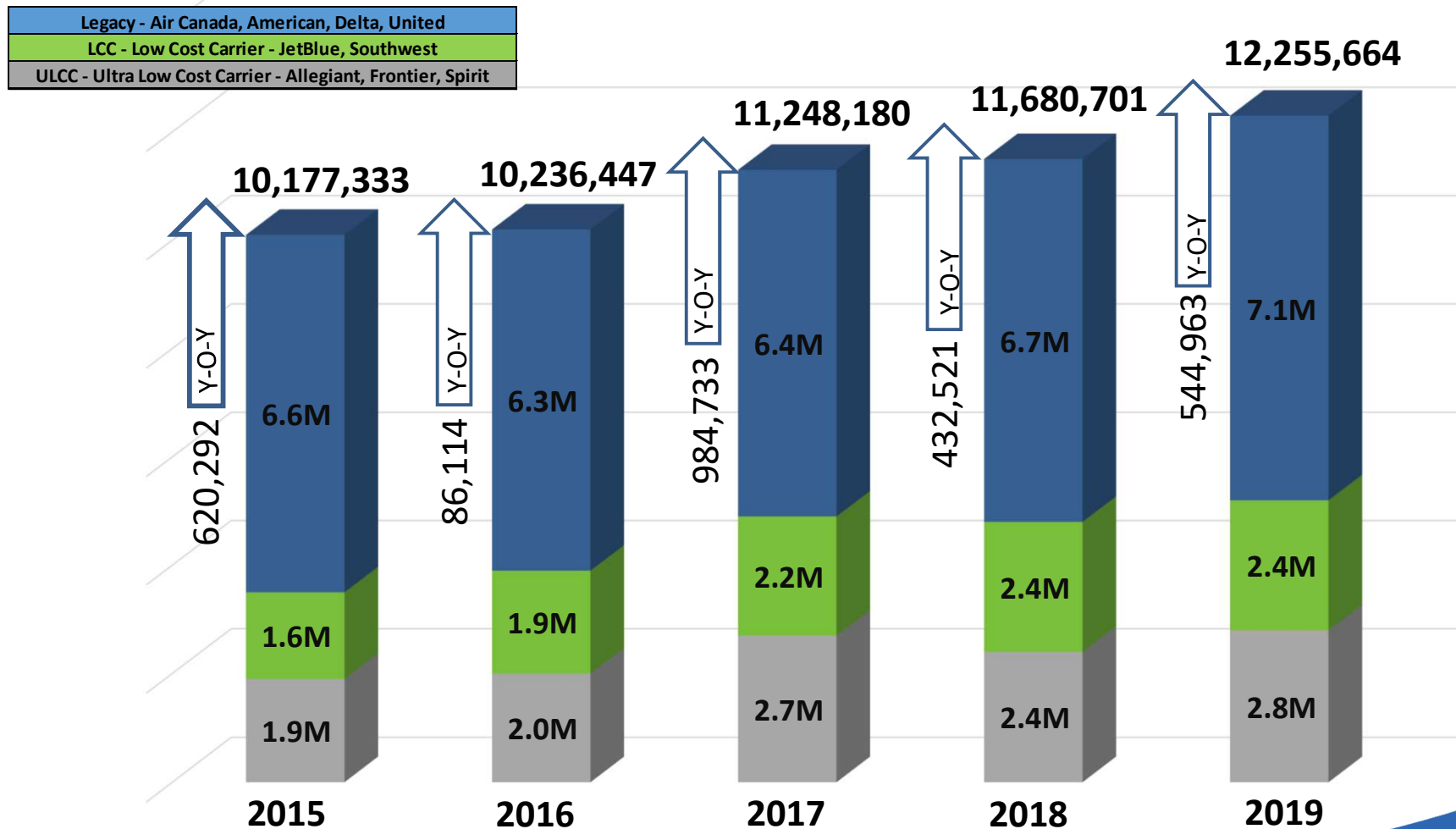


*Note: Commercial air service operations at YNG ceased January 2018.*

*Source: Department of Port Control; DOT BTS*

# Ever Changing Airport

## Airline Seats, Total, Increases YOY, Carrier Type - 2015 - 2019



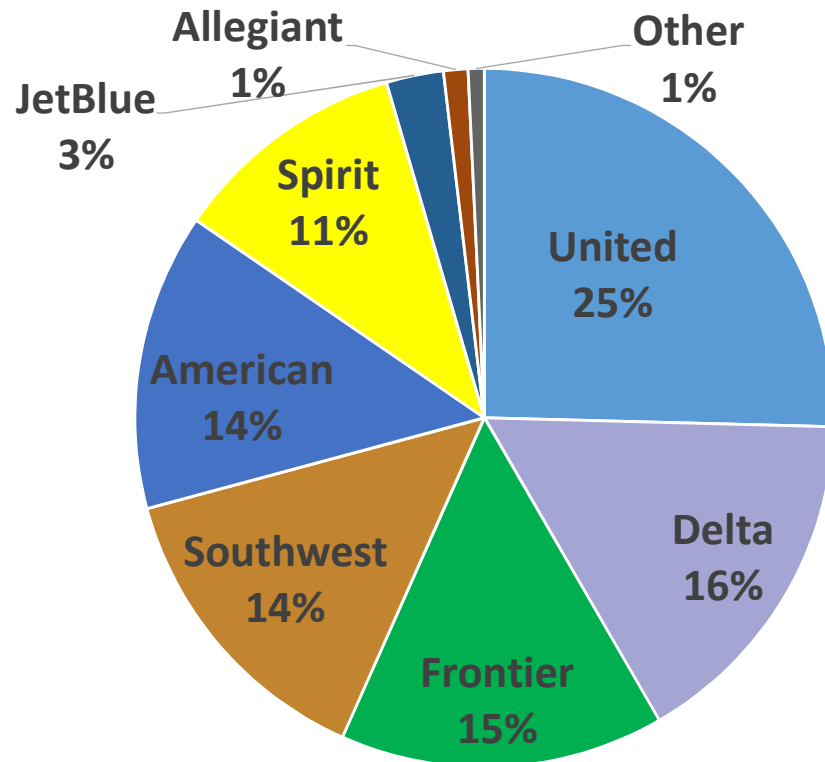
\* Forecast

Source: Diio-Mi Market Intelligence Tool

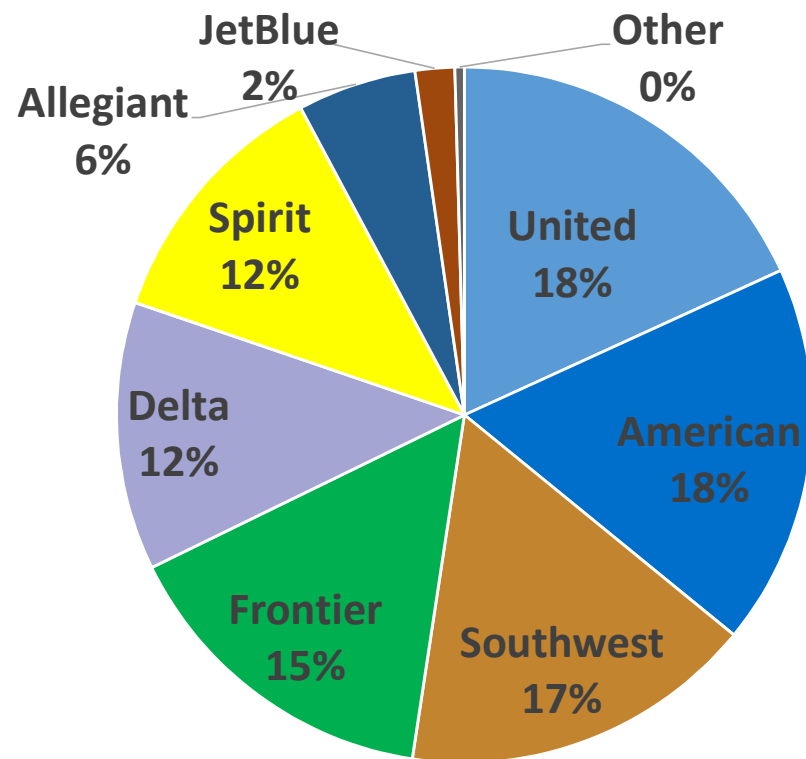
# Ever Changing Airport

## Air Carriers – JAN-FEB vs. MAR-JUN 2020

JAN-FEB 2020



MAR-JUN 2020

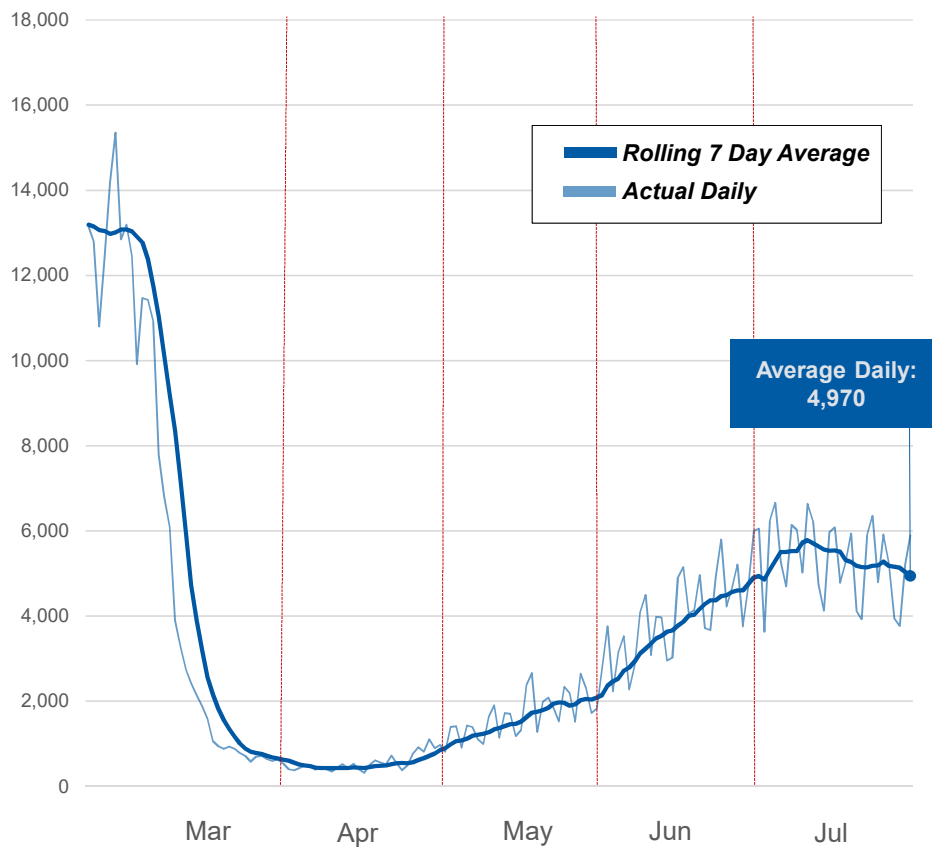


Source: Cleveland Hopkins International Airport

# Challenging Circumstances

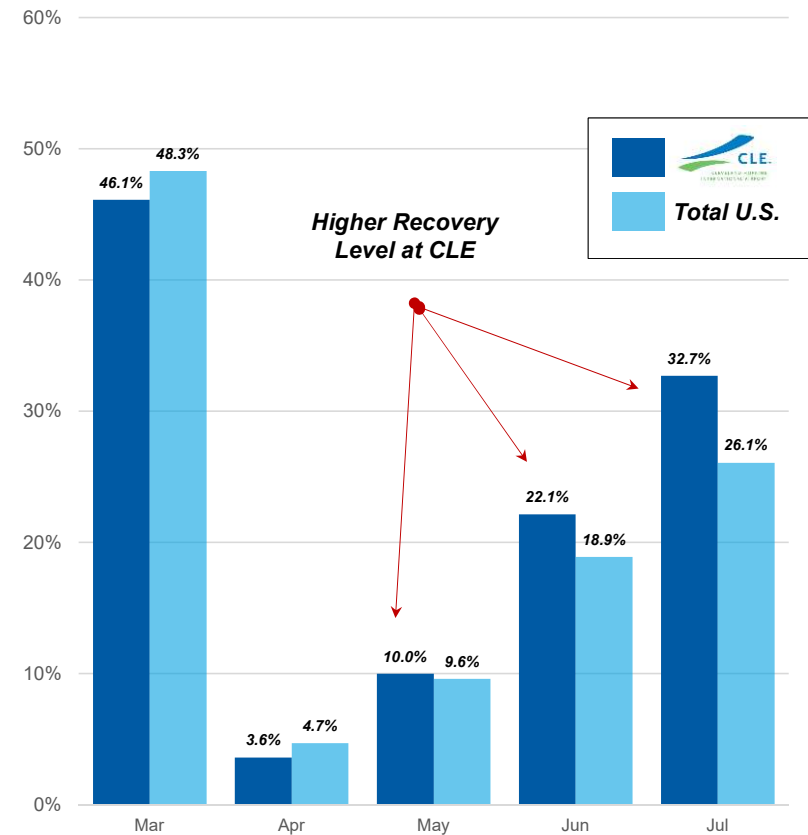
## CLE Sustained Demand – Outpacing National Trends

**CLE Daily TSA Checkpoint Throughput  
March to July 2020 (7-Day Average)**



\*July data through 7/31/2020.

**% of 2019 Signatory Enplanement/TSA Levels:  
CLE vs. U.S. (March to July 2020)**



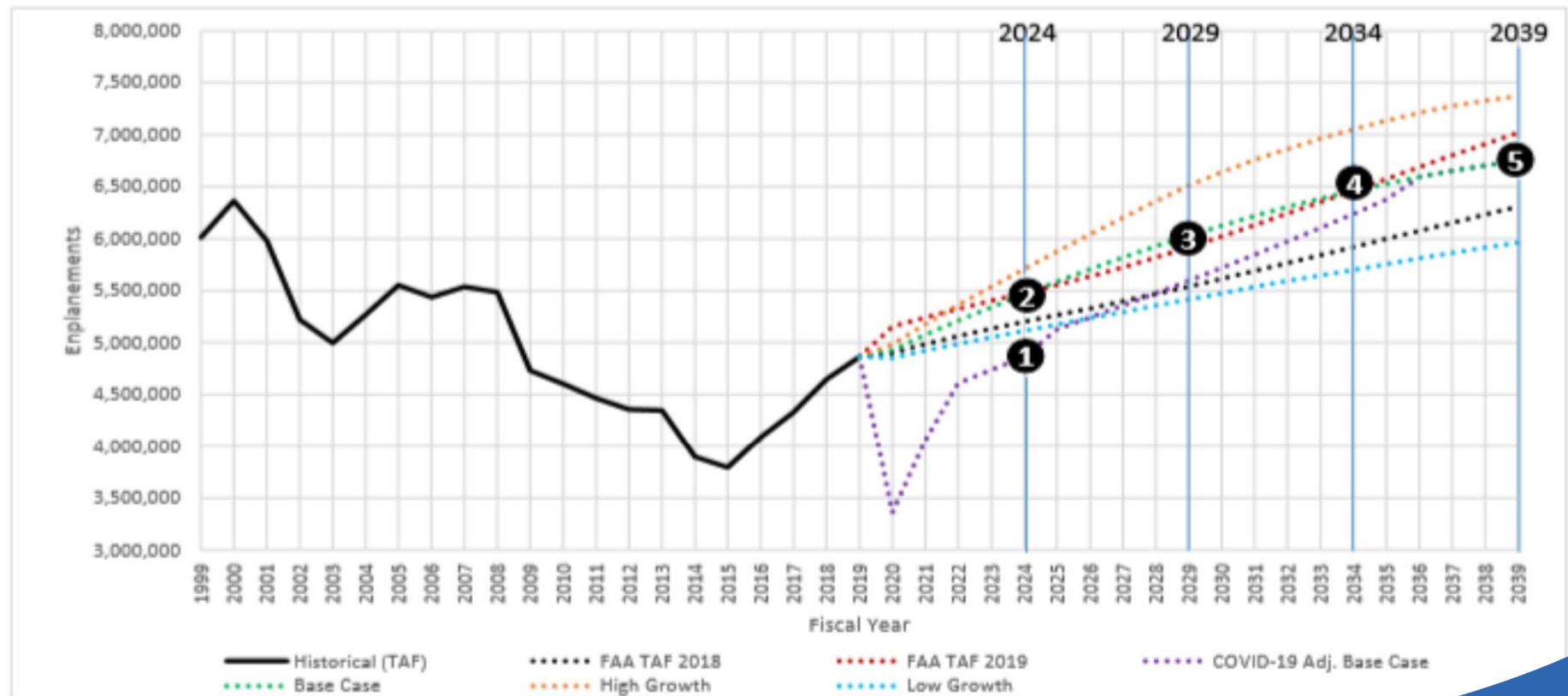


# Path to Recovery

## Projected Passenger Enplanements

### AVIATION ACTIVITY FORECAST

FIGURE 3-38  
FORECAST-TOTAL ENPLANEMENTS (FY 2019-2039)



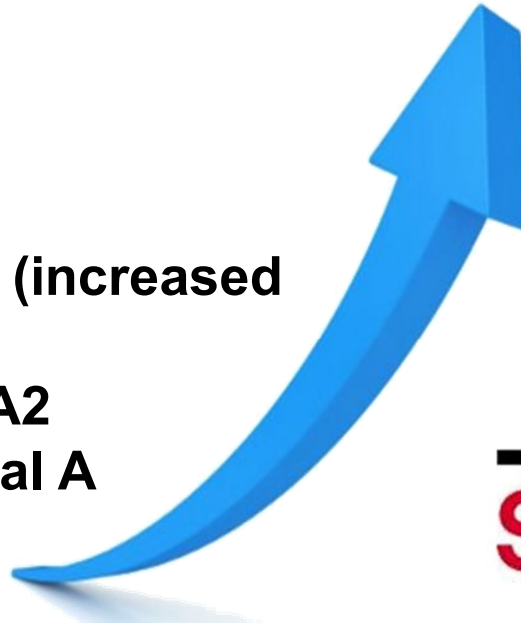
Source: RS&H, 2020; FAA TAF, 2018

Source: RS&H

# Path to Recovery

## Financial Position

- Bond Rating Agencies (increased August 2018)
  - Moody's A2
  - S&P Global A
  - Fitch A-
- Share of Signatory Airline/Non-Airline Revenues 47.6% / 52.4%
- Continue to Reducing Debt



**MOODY'S**  
INVESTORS SERVICE

**S&P Global**

**Fitch**Ratings

*Source: Cleveland Hopkins International Airport*

# Path to Recovery

## Airport Master Plan

OCTOBER 2019

- Mayor Jackson initiated Master Plan Study for CLE.
- Provides a 20 year planning horizon through industry and public involvement.



**BALANCE** Airfield / Terminal / Landside / Airspace

**RESPOND** To Immediate and Near-Term Needs

**POSITION** For Future Growth and Opportunities

**ENHANCE** Customer Experience and Connectivity

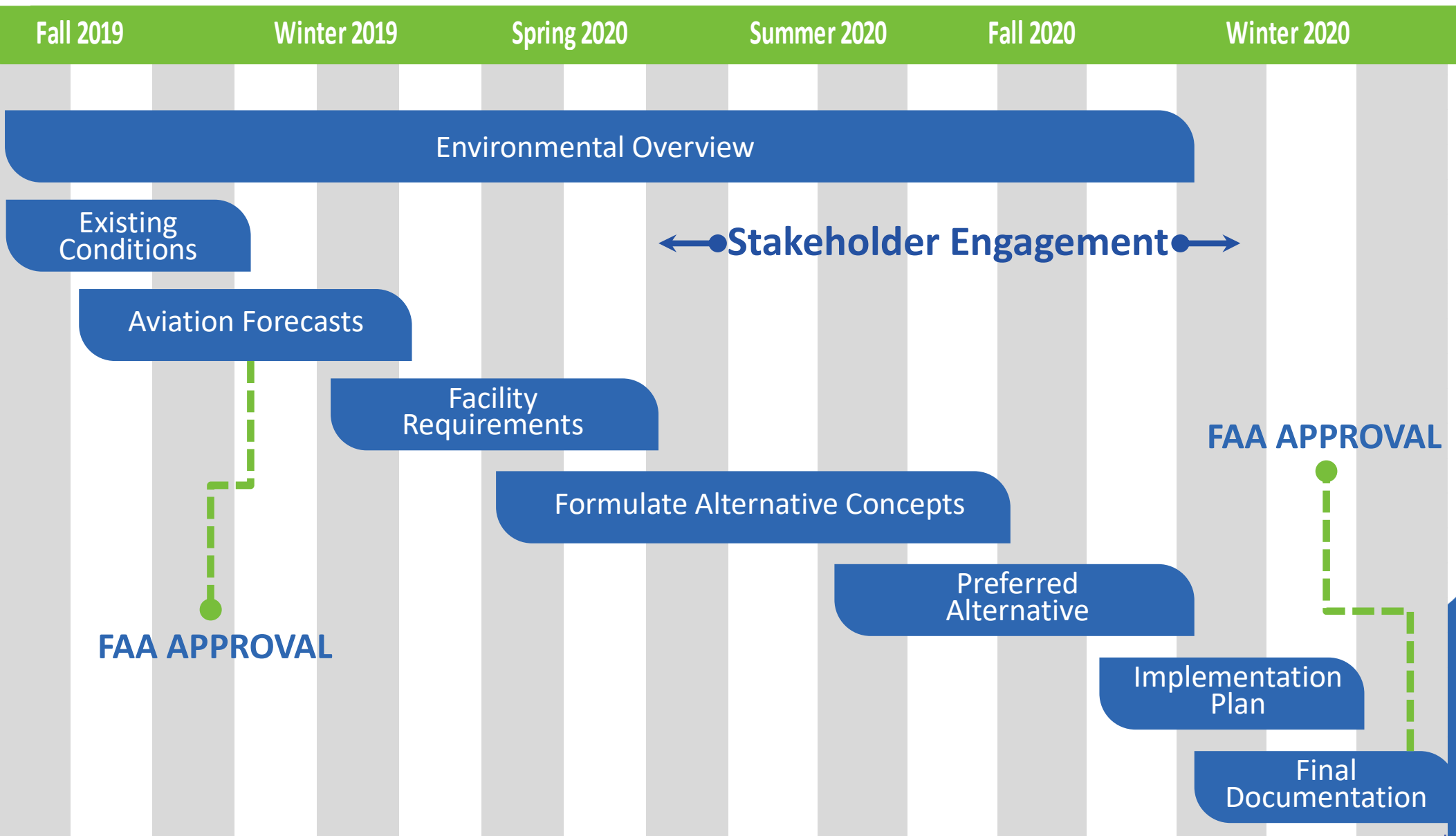
**OPTIMIZE** Assets and Recent Investments

**PRESERVE** CLE's Identity and Strengths

# Path to Recovery

## Airport Master Plan

“Provide for future development of the airport that will satisfy long-term demand for aviation services in a financially feasible manner and at the same time give consideration for aviation, environmental, and socio-economic issues existing in the community.”



# Master Plan Process



## Pre-Planning

Airport Visioning

Current Master Plan Redline

Special Emphasis Study Identification

Project Scoping

Airport's Strategic Plan

Public Involvement Plan

## Investigation Phase

Relevant MP Data Summary

Forecast Review/Update

Facility Requirements Review/Update

Sustainability Benchmarking

FAA Approval

Exhibit A' FAA Approval Airport Layout Plan

## Solutions and Implementation Phase

Identify Alternatives

Financial Feasibility Analysis

Evaluate Alternatives

Implementation

Capital Improvement Program

Confirm Alignment with Airport Strategic Plan

Unmet Needs Assessment

Administrative Recommendations

Select Preferred Alternatives

## Documentation Phase

AGIS System Data Entry

Airport Layout Plan & eALP

Airport Review

City Review

FAA Review

Study Documentation

Handouts

Tech Reports

Exhibit A' - ALP Set

Airport Adoption

FAA Approval

## Public Involvement Program

Community Outreach

Advisory Committee Meeting

Community Outreach

Advisory Committee Meeting

Community Outreach

Advisory Committee Meeting

Community Outreach

Advisory Committee Meeting

Public Town Hall

Community Outreach

# Bright Future

## Airport Master Plan

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# Feedback Comments

## Onsite Survey

**[Clevelandairportmasterplan.com/comments](http://Clevelandairportmasterplan.com/comments)**

# THANK YOU!

**Robert Kennedy, I.A.P., A.A.E.**

*Director of Airports*

*Cleveland Hopkins International Airport*

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