



HCAA Project No. 6915 22
2022 Tampa International Airport
Master Plan Update (MPU)

April 25, 2022



Agenda

Welcome/Opening Remarks

2022 Master Plan Update

- **Overview**
- **Aviation Activity Forecast**
- **Next Step**





Master Plan Update

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

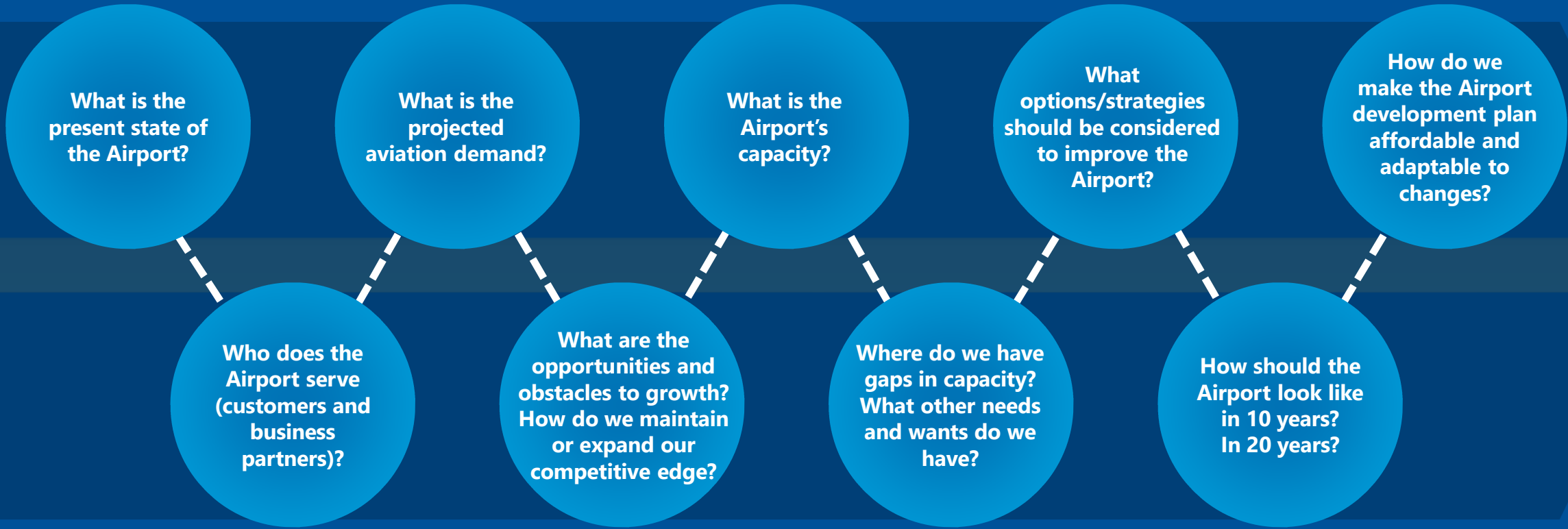
Culminates with an updated Airport Layout Plan



Federal Aviation
Administration
Airport Improvement
Program (AIP)



What Questions will the Master Plan Update Answer?



2012 Master Plan Phases



Rental Car Center



SkyCenter Development



New Airside D

Phase 1: Decongestion



Phase 2: Enabling



Phase 3: Expansion



Automated People Mover
Main Terminal Expansion & Concessions
Redevelopment



Curbside Expansion



New Airside D – Concessions Hub and FIS



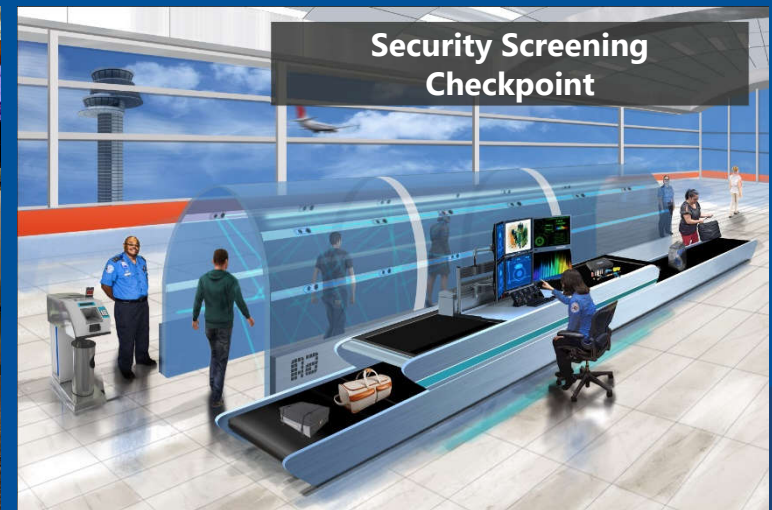
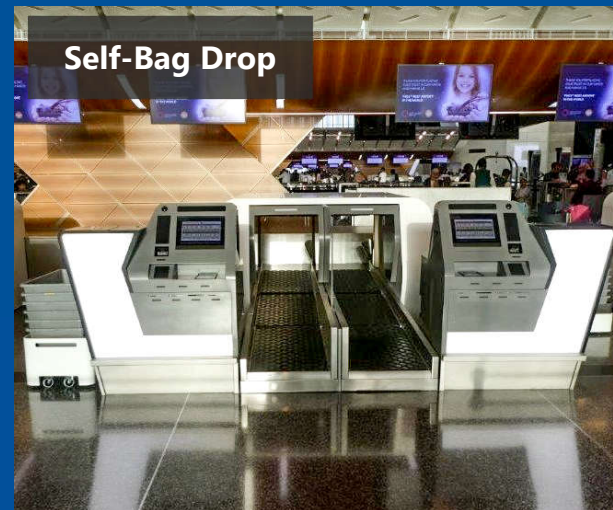


2022 Master Plan Update

2022 Master Plan Update Process

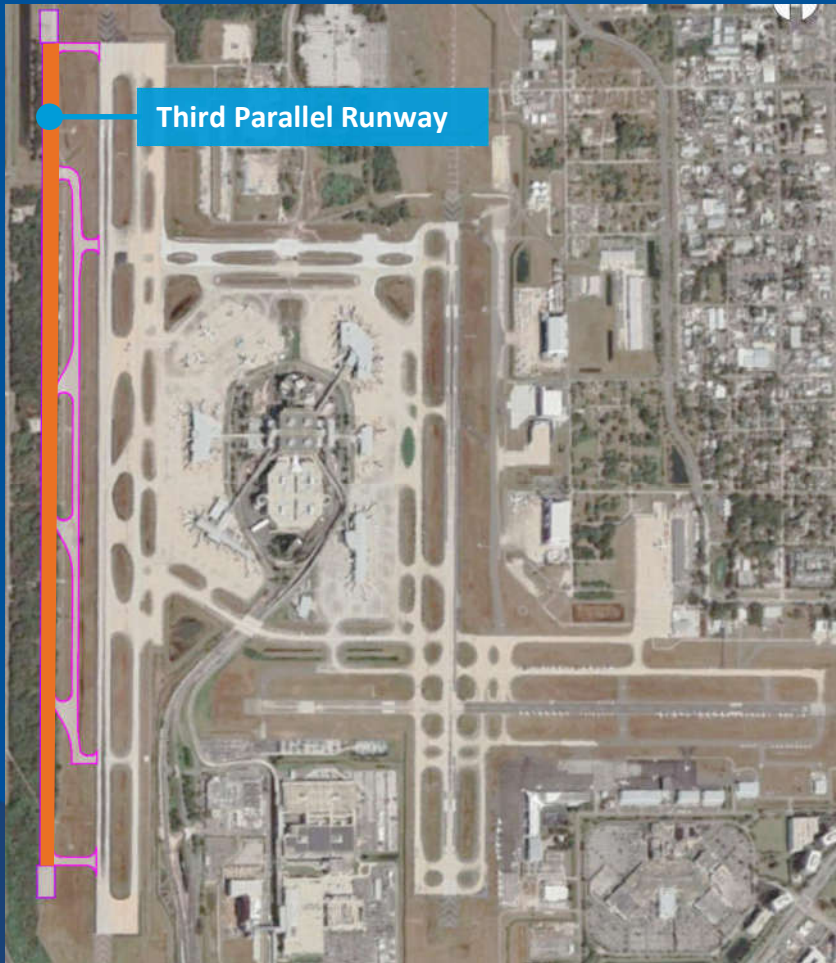


Innovative and Emerging Technologies



Airfield Focus Areas

Assess Future Airfield Capacity
(Timing for third parallel runway)



Review Existing Airfield Layout for Compliance
with FAA Design Requirements



Terminal Focus Areas

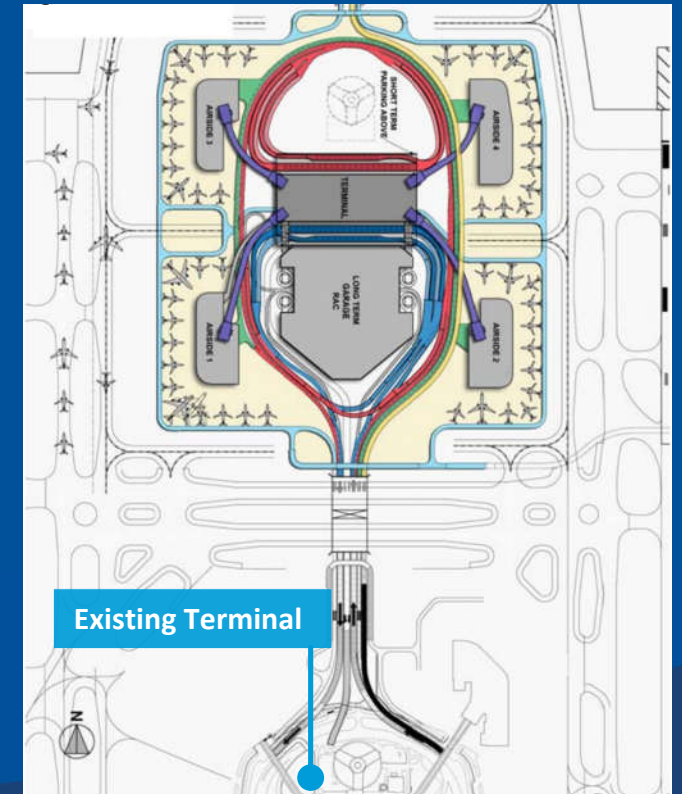
Assess Existing Terminal Capacity



Reassess Airside D Timeline



Future Terminal Requirements and North Terminal Implementation

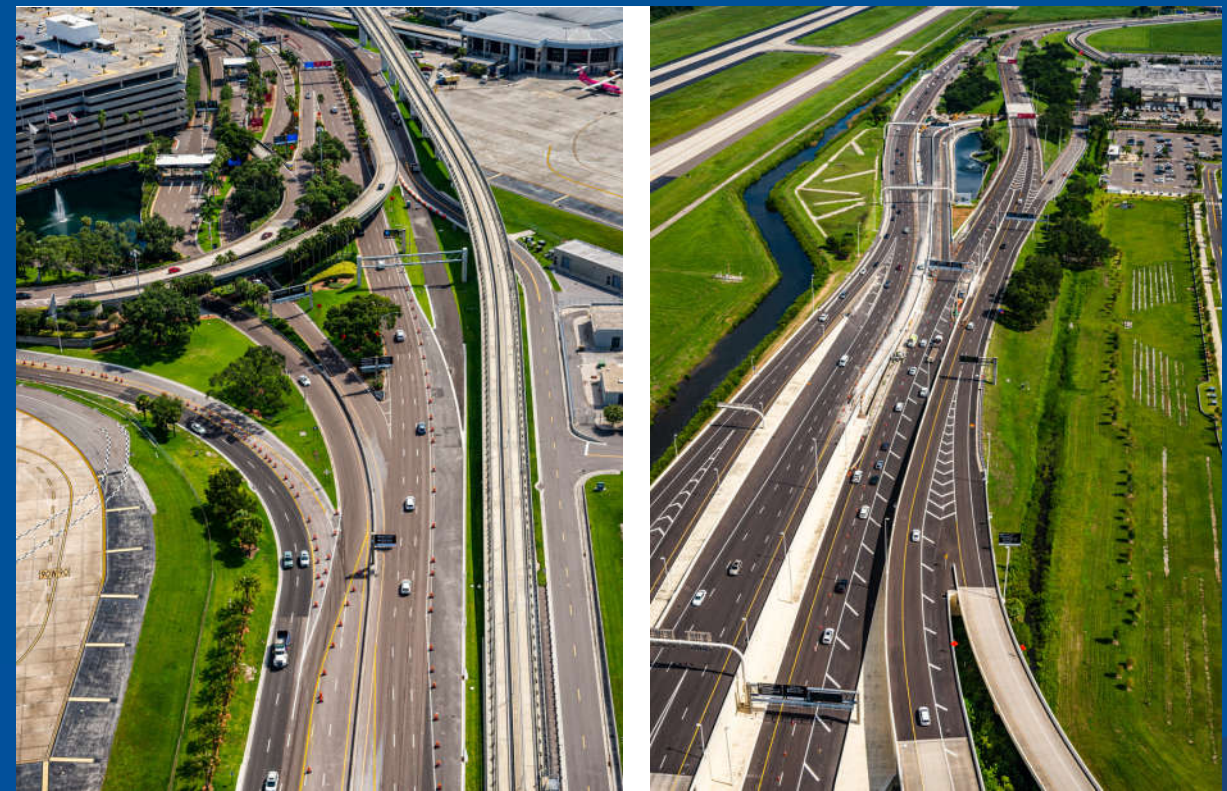


Landside Focus Areas

Assess Future Ground Transportation and Parking Requirements



Identify Future Access and On-Airport Circulation



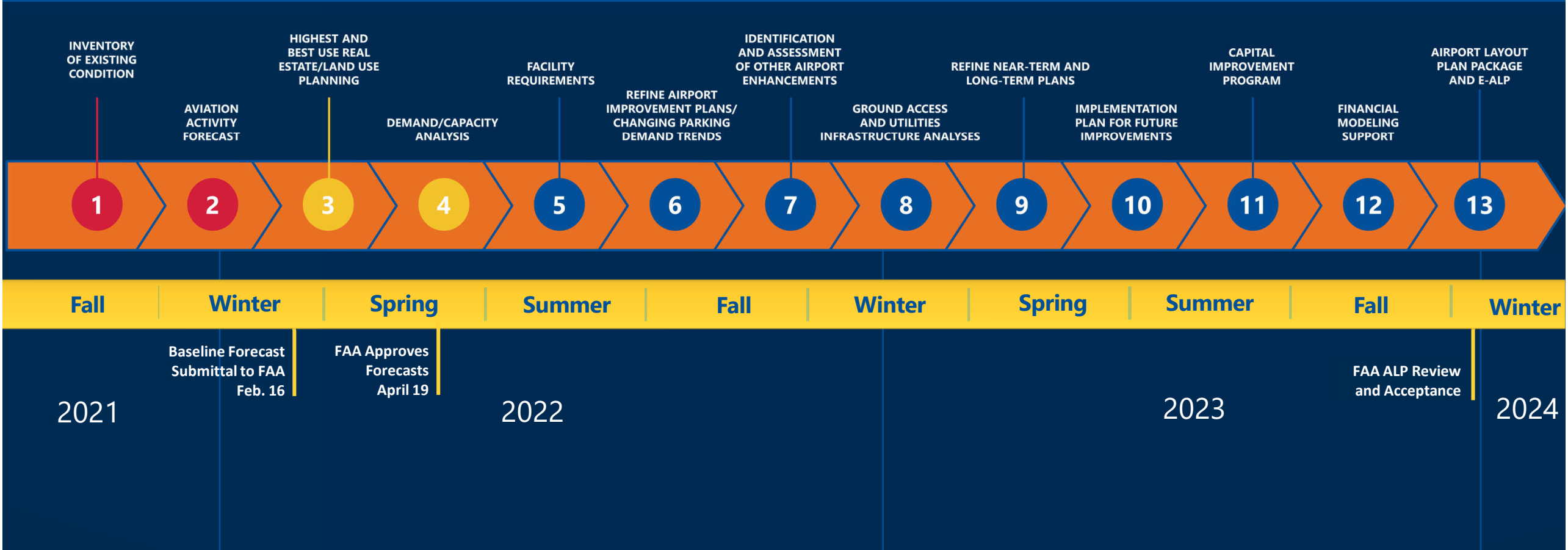
Other Aviation Business Sectors

Assess 20-Year Capacity Needs and Opportunities for Additional Airport Enhancements



2022 MPU Project Schedule

- Completed
- Ongoing
- Future Tasks





Aviation Activity Forecasts

Forecast Methodology

Inputs

- Historical local passenger demand
- Socioeconomic and demographic data
- Changes in passenger demand patterns
- Airline strategies in response to the pandemic
- Leisure and business travel trends
- Local, national, and global travel restrictions
- Airline partner feedback

Methodology

Assessment of pandemic influenced factors and incorporation of direct airline feedback

Develop projections blending recovery forecast with longer-term socioeconomic-driven demand growth through 2042

Identification of historical relationships between passenger demand and socioeconomic factors

Forecast (Output)



Economic Indicators for Tampa Bay

Tampa MSA ranking



MSA Catchment Area (includes MSA)

Note: MSA – Metropolitan Statistical Area; CAGR – Compound Annual Growth Rate
Sources: Woods & Poole Economics, Inc. Moody's Analytics, November 2021.

POPULATION



3.26M → 4.02M
2021 1.0% BY 2042
20 yr. CAGR
TPA 4-county MSA

PER CAPITA PERSONAL INCOME



\$46,185 → \$66,307
2021 1.7% BY 2042
20 yr. CAGR

EMPLOYMENT



1.95M → 2.57M
2021 1.3% BY 2042
20 yr. CAGR

GROSS REGIONAL PRODUCT



\$161B → \$256B
2021 2.2% BY 2042
20 yr. CAGR

EMPLOYMENT GROWTH

expected to average 2.7% annually between CY 2021 and CY 2024

Leisure and hospitality

8.7% CAGR

Other services

6.4% CAGR

Professional and business services

4.8% CAGR



Forecast Components

Forecast Components

Drive Needs Related to Facility Requirements



Total Passengers

- Terminal Facilities
- Terminal Concessions
- Parking Facilities



Cargo Tonnage

- Cargo Facilities
- Aircraft Parking Apron
- Ground Servicing Equipment



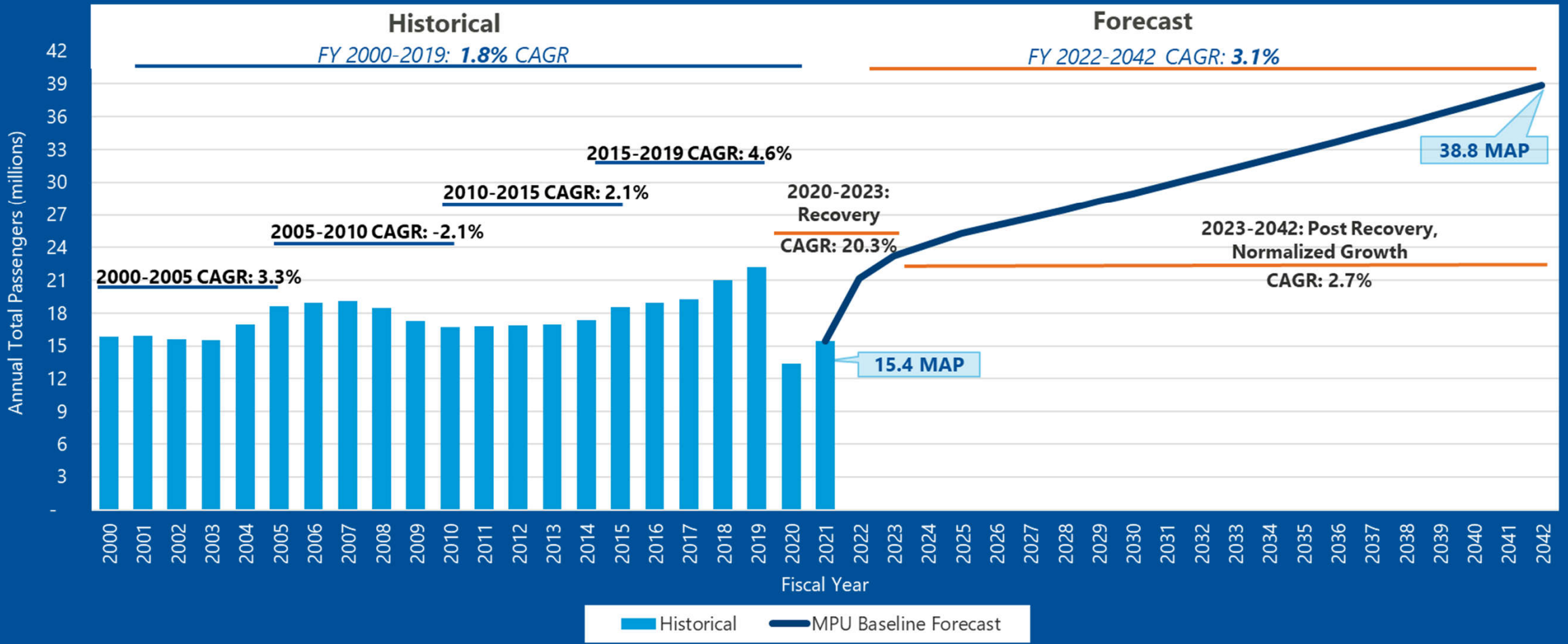
Total Aircraft Operations (Airline, General Aviation Cargo, and Others)

- Airfield Capacity (Runways/Taxiways)
- Aircraft Gates
- Aircraft Parking Apron





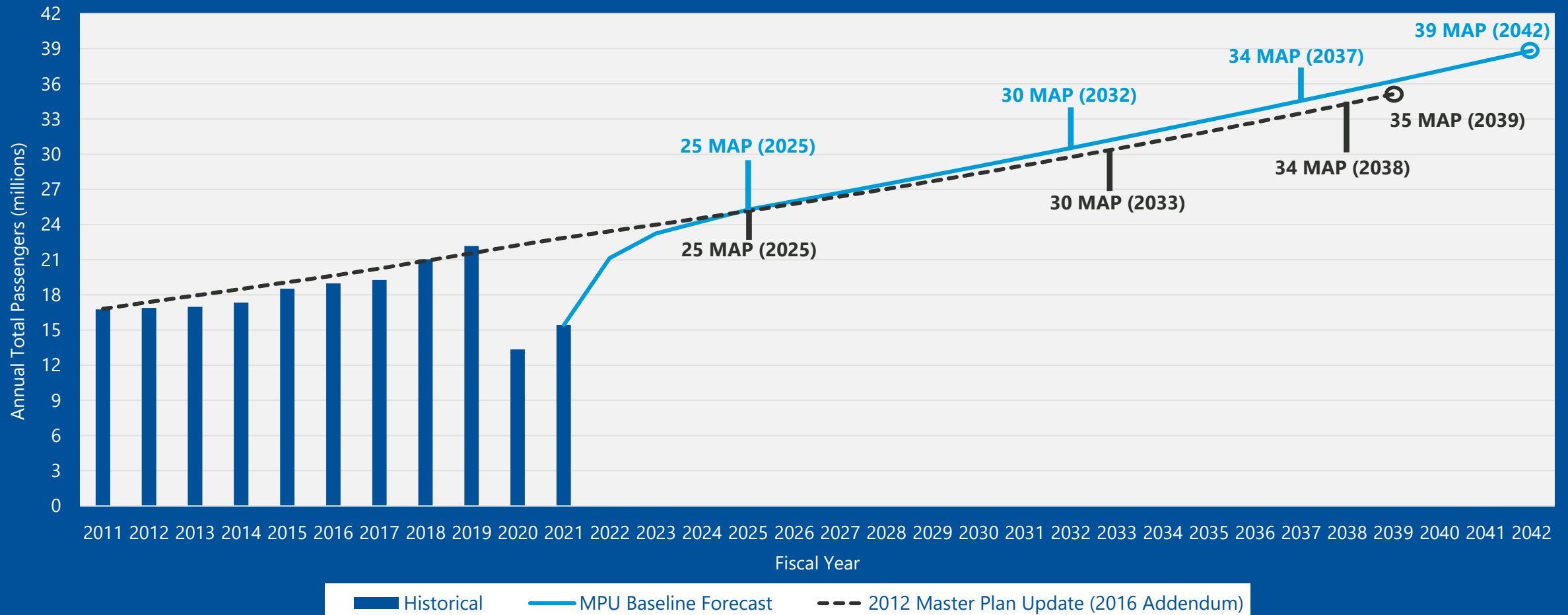
Total Passengers Forecast (in Million Annual Passengers)



Note: CAGR – Compound Annual Growth Rate; MAP – Million Annual Passengers
2022 Tampa International Airport Master Plan Update (MPU)



Total Passenger Forecast Comparison – 2012 Master Plan Update



Sources: Hillsborough County Aviation Authority (historical), November 2021; Ricondo & Associates, Inc. (forecast), November 2021.
Note: CAGR – Compound Annual Growth Rate.
2022 Tampa International Airport Master Plan Update (MPU)

Forecast Components

Forecast Components

Drive Needs Related to Facility Requirements



Total Passengers

- Terminal Facilities
- Terminal Concessions
- Parking Facilities



Cargo Tonnage

- Cargo Facilities
- Aircraft Parking Apron
- Ground Servicing Equipment



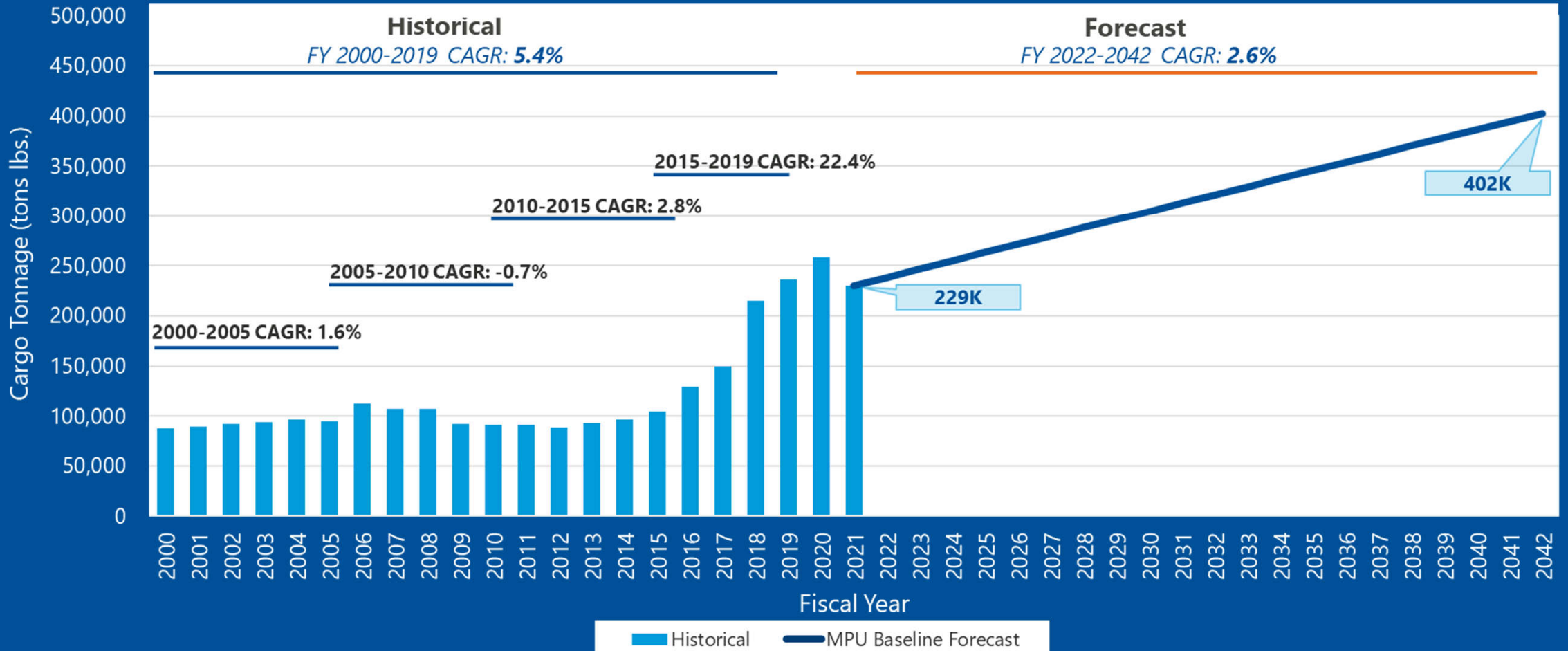
Total Aircraft Operations (Airline, General Aviation Cargo, and Others)

- Airfield Capacity (Runways/Taxiways)
- Aircraft Gates
- Aircraft Parking Apron





Total Cargo Forecast (in Tons)



Note: CAGR – Compound Annual Growth Rate.
2022 Tampa International Airport Master Plan Update (MPU)

Forecast Components

Forecast Components

Drive Needs Related to Facility Requirements



Total Passengers

- Terminal Facilities
- Terminal Concessions
- Parking Facilities



Cargo Tonnage

- Cargo Facilities
- Aircraft Parking Apron
- Ground Servicing Equipment



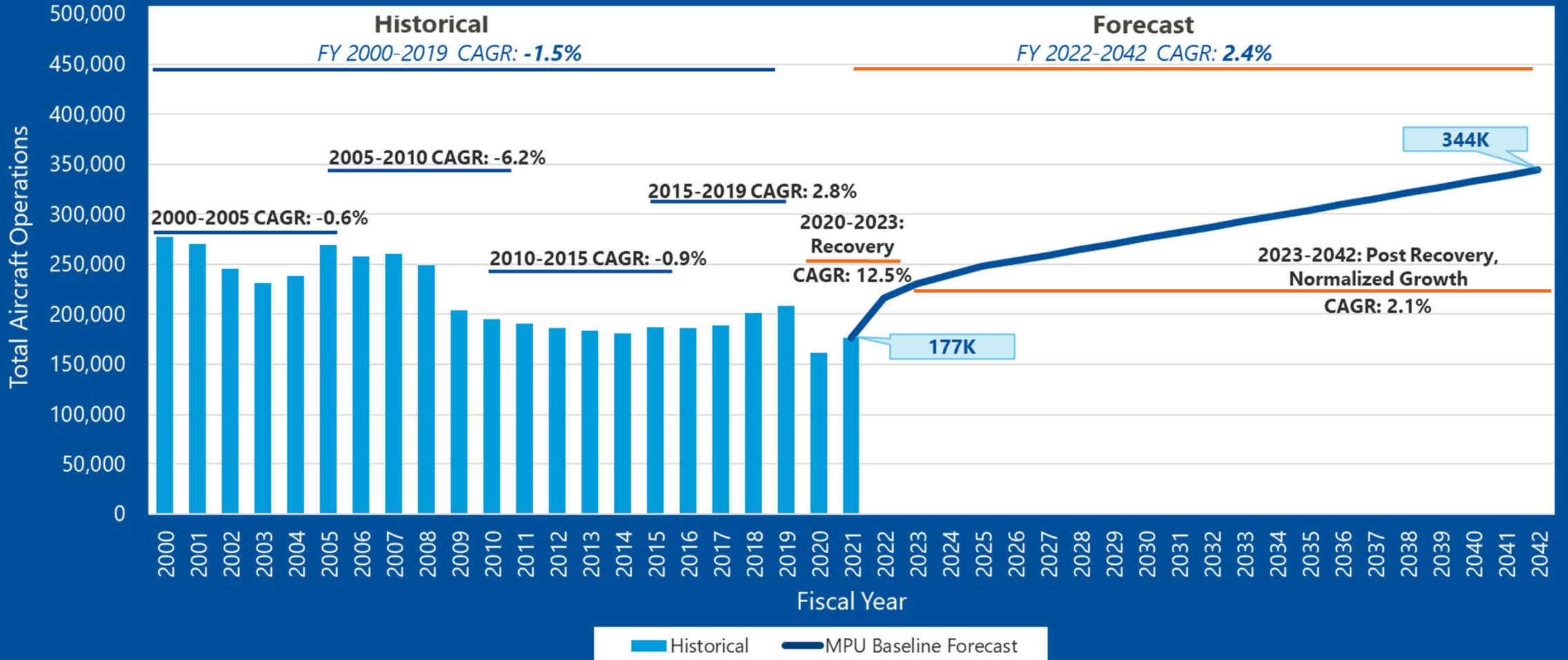
Total Aircraft Operations (Airline, General Aviation Cargo, and Others)

- Airfield Capacity (Runways/Taxiways)
- Aircraft Gates
- Aircraft Parking Apron





Total Aircraft Operations Forecast



Note: CAGR – Compound Annual Growth Rate.
2022 Tampa International Airport Master Plan Update (MPU)



Questions/Comments



Next Steps

Next Steps

- Next Internal Stakeholder Meeting
 - Fall 2022
- Master Plan Tasks:
 - Gating Analysis and Airside D Timing
 - Future Needs and Facility Requirements
 - Preliminary Alternatives

2022 TPA Master Plan Update
Webpage/Comment Form



<https://www.tampaairport.com/master-plan/2022-update>



