Metropolitan Airports Commission 2022-2028 CIP Review

11/18/2021

Technical Advisory Committee - Planning
Metropolitan Airports Commission Roles

- Minnesota Statutes 473.601-473.679
- Promote Aviation & Competitive Air Service
- Owns & Operates 7 Public Airports in Metro Area
- Prepares Airport Long-Term Comprehensive Plans
- Annually prepares Capital Improvement Program (CIP) to implement planned improvements
Met Council Aviation Planning Roles

- Minnesota Statute 473.621
- Prepare Regional Aviation System Plan
- Review Metro Airport & community comprehensive plans, environmental evaluations
- Review the MAC Capital Improvement Program
Legislative Requirements CIP Review

- MS 473.621 Subd. 6
- Public participation process in the CIP process
- Council reviews all projects
Legislative Requirements CIP Review

• Approve projects with potential of significant effect on regional development
  – Minneapolis – St. Paul International Airport (MSP) greater than $5,000,000.
  – Reliever Airports greater than $2,000,000.
• Significant effect criteria in legislation
2022 Findings

- Adequate public participation process
- Assessment of Environmental Effects (AOEE)
- CIP identifies adequate funding
- CIP is consistent with 2040 TPP Update
- There are no projects requiring Met Council approval
COVID-19 Impacts

• Thrive MSP 2040 –
  • Policy Direction is to create consistent, compatible, and coordinated local comp plans
  • Consistent with policy direction and economic outcomes of the region.
  • Prosperity Outcome - This outcome is to plan, invest in infrastructure and amenities, and quality of life for economic competitiveness.

• Transportation Policy Plan
  • Consistent with proposed airport development within the TPP
2. COVID-19 pandemic and effects on the aviation industry

- Passenger airlines experienced unprecedented reduction in demand for air travel.

U.S. airline passenger traffic, percentage change 2019 versus 2020, by type

Source: GAO analysis of Department of Transportation Bureau of Transportation Statistics data. [GAO-20-164428]
COVID-19 Impacts

Travelers compared to 2019 levels have remained stagnant around 77%

DAILY TSA CHECKPOINT TRAVELER NUMBERS, APRIL 2020 THROUGH OCTOBER 2021
Percentage of same day travel in 2019

Quick rebound in early summer 2020
Stagnating growth through 2H 2020
Rapid growth in 1H 2021
Stalled growth over summer 2021

Source: Transportation Security Administration; Allevon Pacific Aviation Consulting analysis
COVID-19 Impacts

Only ATL had more Delta seats in 2021

DELTA HUBS RANKED BY ANNUAL DEPARTING SEATS
Calendar Year 2021 vs Calendar Year 2019

#8

#4
SLC
2019: 10.8M Seats
2021: 11.1M Seats

#2
MSP
2019: 14.1M Seats
2021: 12.4M Seats

#3
DTW
2019: 16.3M Seats
2021: 12.1M Seats

#1
ATL
2019: 49.6M Seats
2021: 39.8M Seats

SLC has grown seat capacity during the pandemic

Source: Dito MI Total Seats CY 2021 as of September 24, 2021
Alleven Pacific Aviation Consulting analysis
COVID-19 Impacts

Delta is operating 86% of pre-Pandemic domestic MSP routes

DELTA’S NONSTOP DOMESTIC MARKETS FROM MSP, OCTOBER 2019-2021
Number of United States markets served from MSP

- October 2019 (Pre-Pandemic): 110
- October 2020 (Pandemic): 85
- October 2021 (Now): 95

Source: DioMi by Catums; Alevon Pacific Aviation Consulting analysis
COVID-19 Impacts

Most of Delta’s international network is scheduled to be reinstated by Spring 2022, including Trans-Pacific.

Nov 8 – Travel Restrictions Eased

Source: Dilo MIl schedules October 2021
Ailevon Pacific Aviation Consulting analysis