

# **CLE – Master Plan**

# **Quarter Century Vision**

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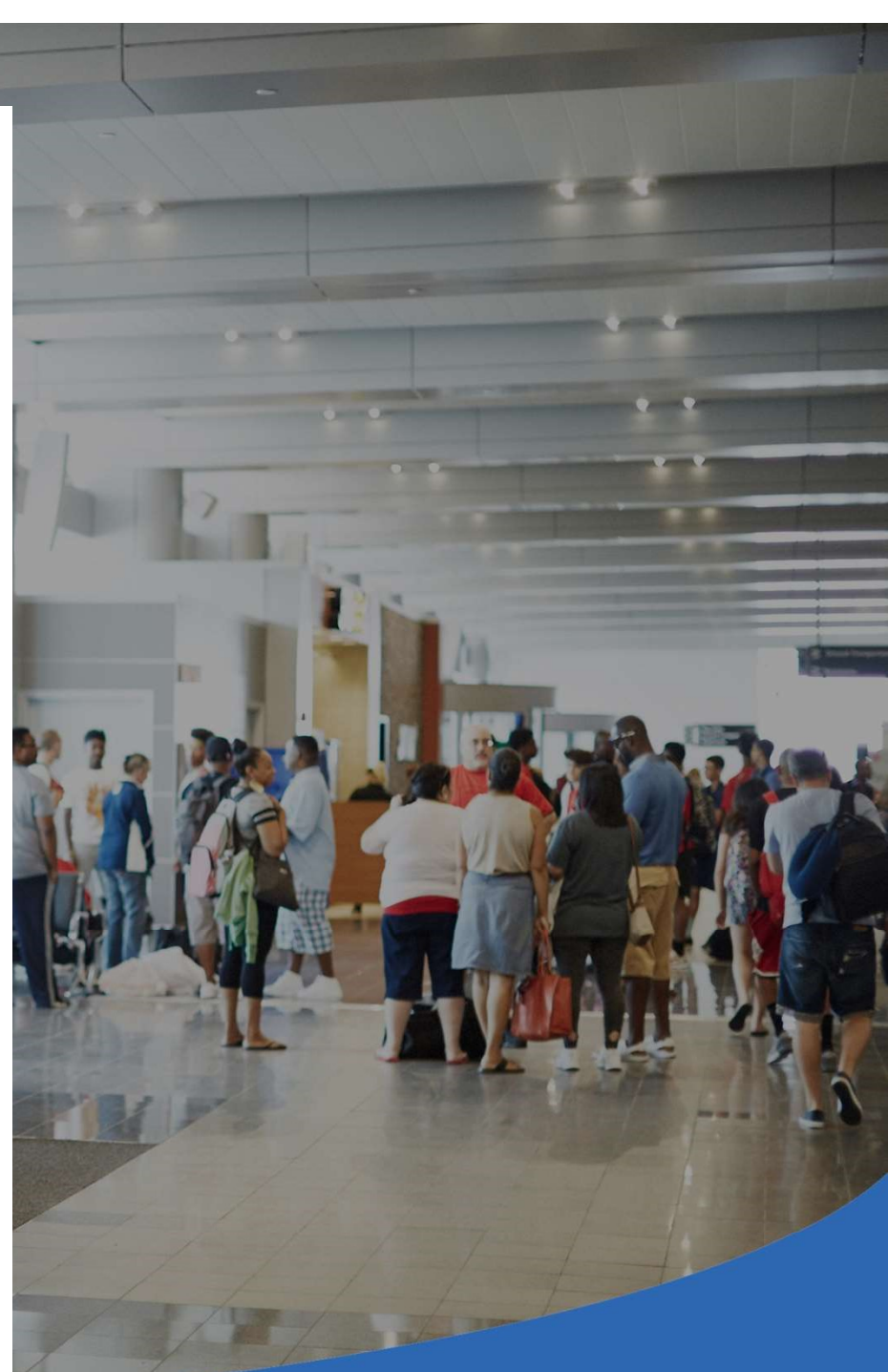
**Stakeholder Presentation**  
**August and September 2020**



# Agenda

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- **CLE Overview**
- **Passenger History**
- **Ever Changing Airport**
- **Challenging Circumstances**
- **Path to Recovery**
- **Close/Questions/Comments**



# CLE Overview

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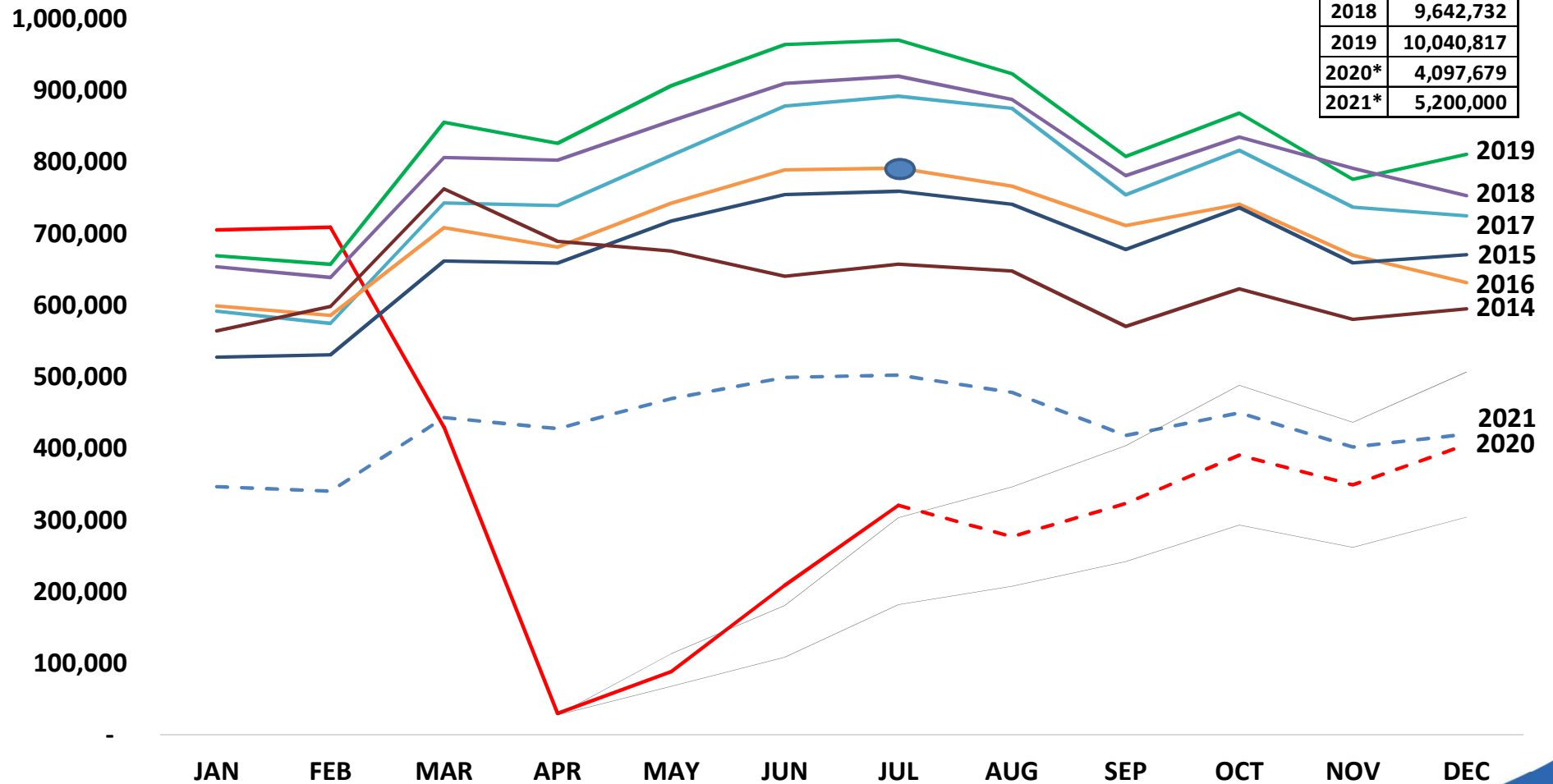
<b>2019</b>		<b>Forecast 2020 COVID-19</b>
<b>5,135,720</b>	<b>TSA Throughputs (Annual)</b>	<b>2,100,000</b>
<b>54,890</b>	<b>Landings (Annual)</b>	<b>22,500</b>
<b>10,040,817</b>	<b>Passengers (Annual Dep &amp; Arr)</b>	<b>4,097,679</b>
<b>11</b>	<b>Passenger Airlines</b>	<b>10</b>
<b>4</b>	<b>Cargo Airlines</b>	<b>4</b>
<b>460</b>	<b>City Airport Employees</b>	<b>460</b>
<b>7,500</b>	<b>Total Airport Employees</b>	<b>6,200</b>

*Source: TSA, Cleveland Hopkins International Airport*

# Passenger History

## Traffic 2014 – 2021

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
2021*	5,200,000



\* Forecast

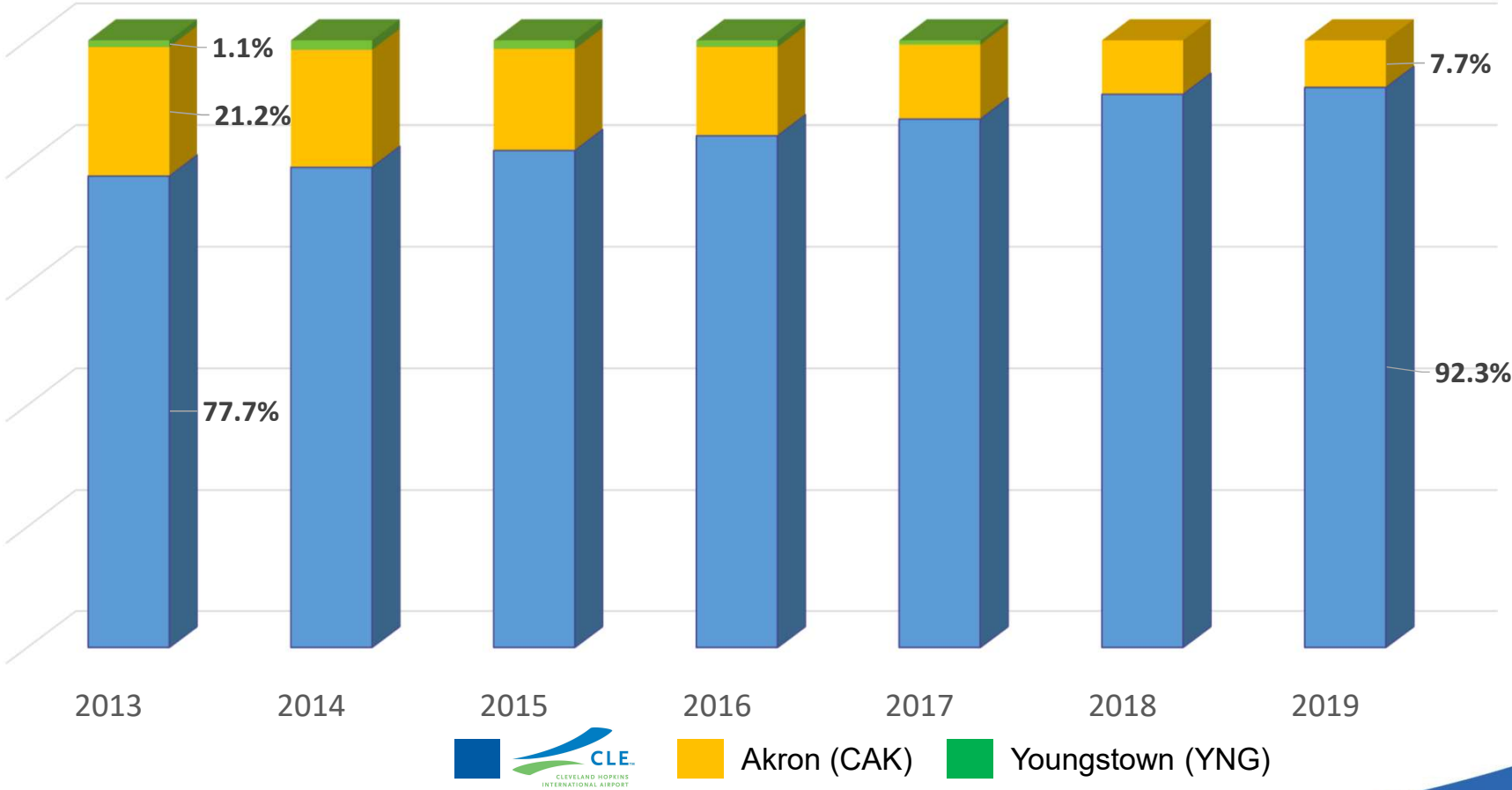
\*\* Departing and Arriving Passengers

Source: Cleveland Hopkins International Airport

# Ever Changing Airport

## CLE consolidating NE Ohio O&D passenger demand

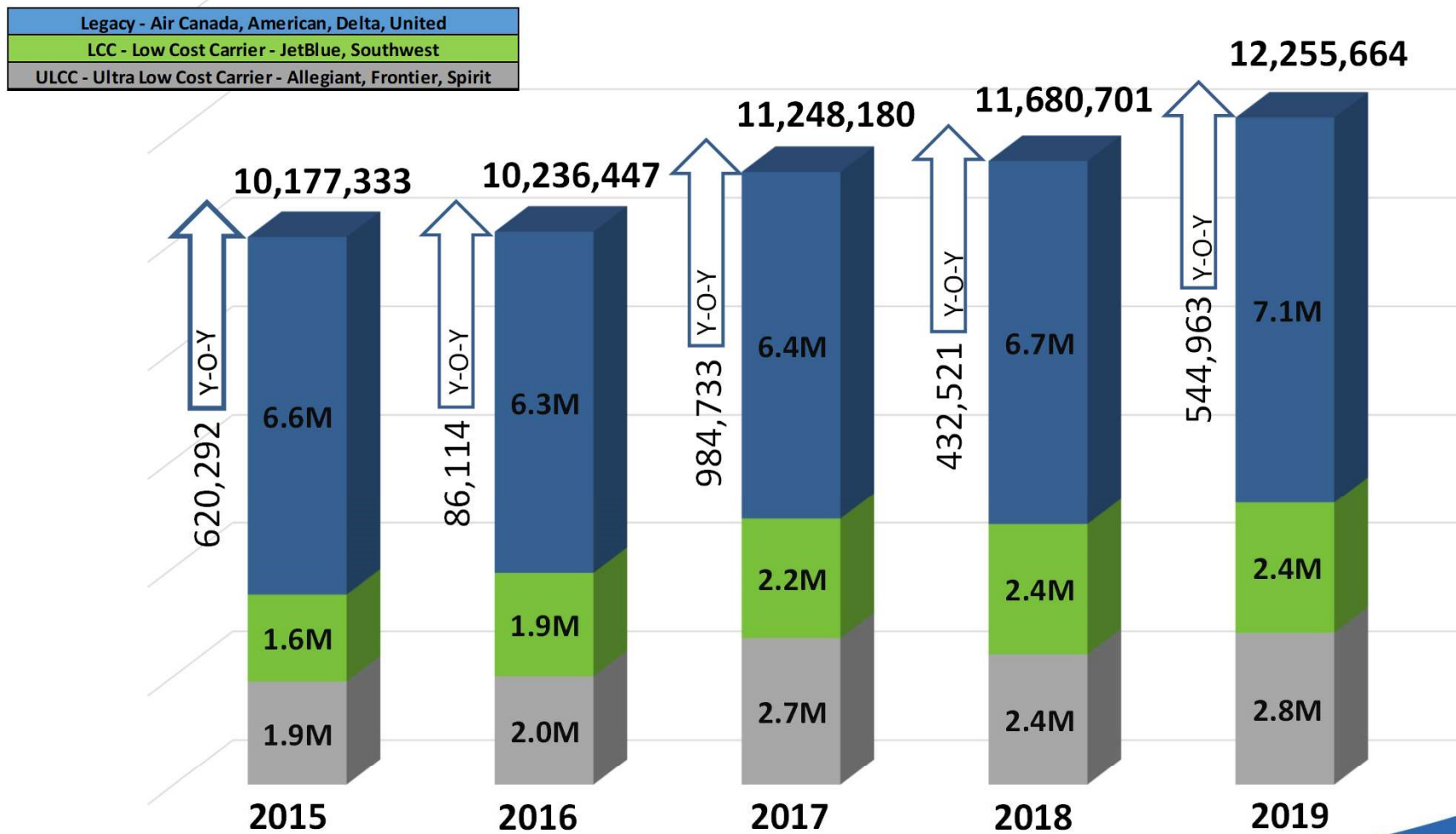
Total O&D Enplaned Passengers—NE Ohio



Note: Commercial air service operations at YNG ceased January 2018.  
Source: DOT BTS, Cleveland Hopkins International Airport

# Ever Changing Airport

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



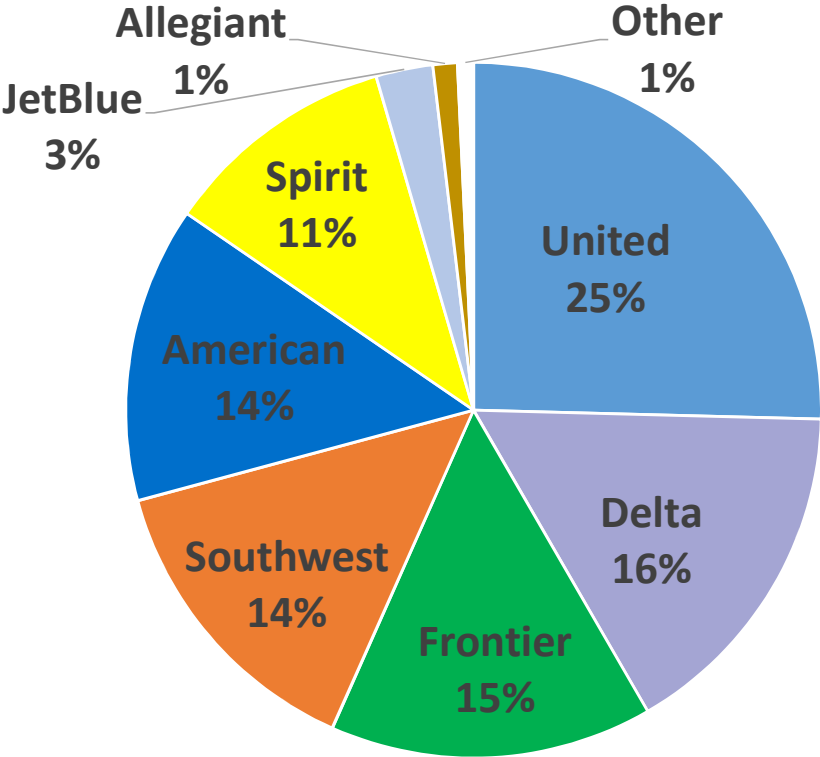
\* Forecast

Source: Diio-Mi Market Intelligence Tool

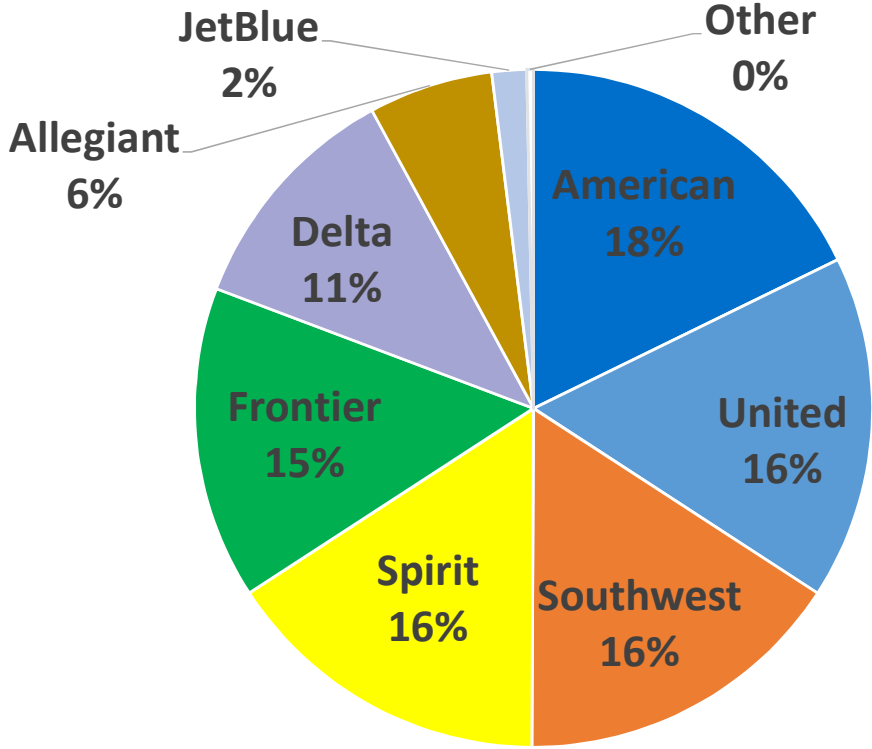
# Ever Changing Airport

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

JAN-FEB 2020



MAR-JUL 2020

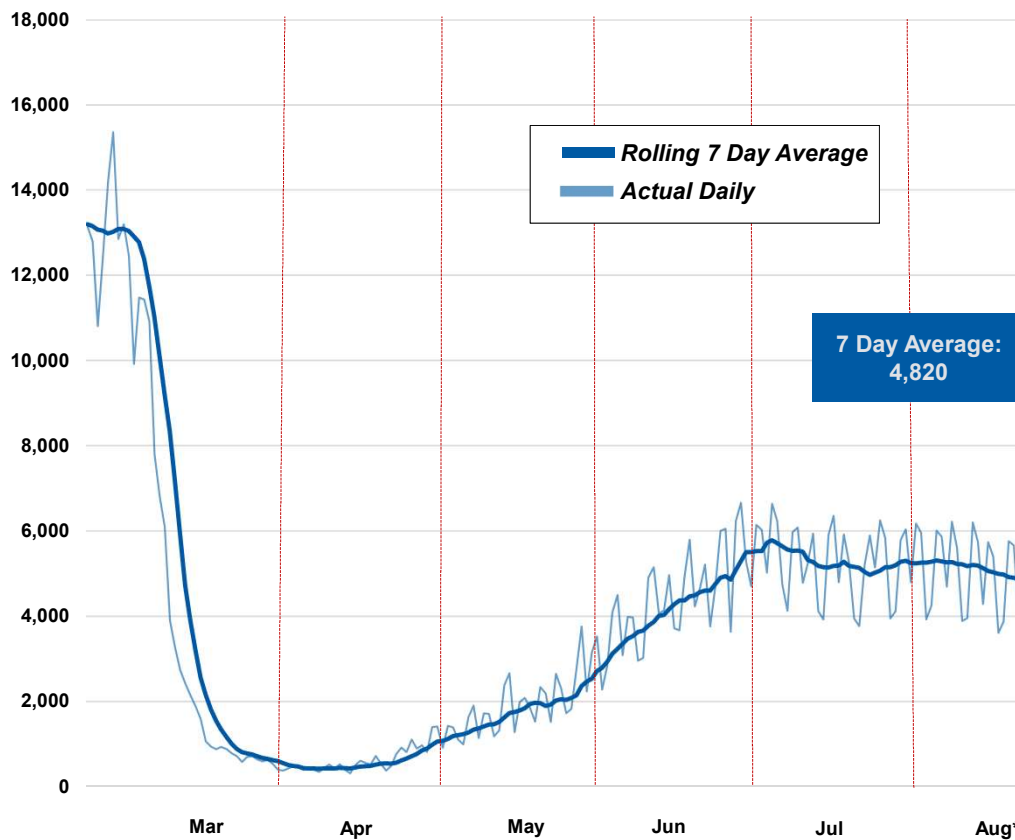


Source: Cleveland Hopkins International Airport

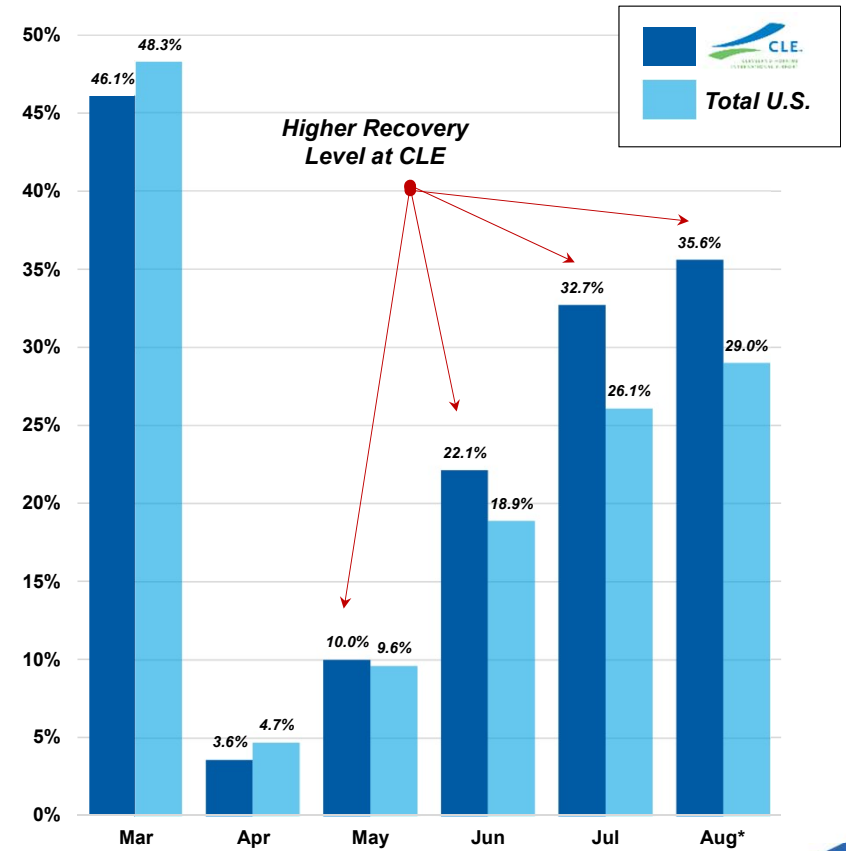
# Challenging Circumstances

## CLE Sustained Demand – Outpacing National Trends

**CLE Daily TSA Checkpoint Throughputs**  
 March 1 to August 30 2020 – Actual and 7-Day Average



**TSA Checkpoint Throughputs/Enplanements**  
 CLE vs. U.S. (March 1 to August 30 2020)



\*August data through 8/30/2020.

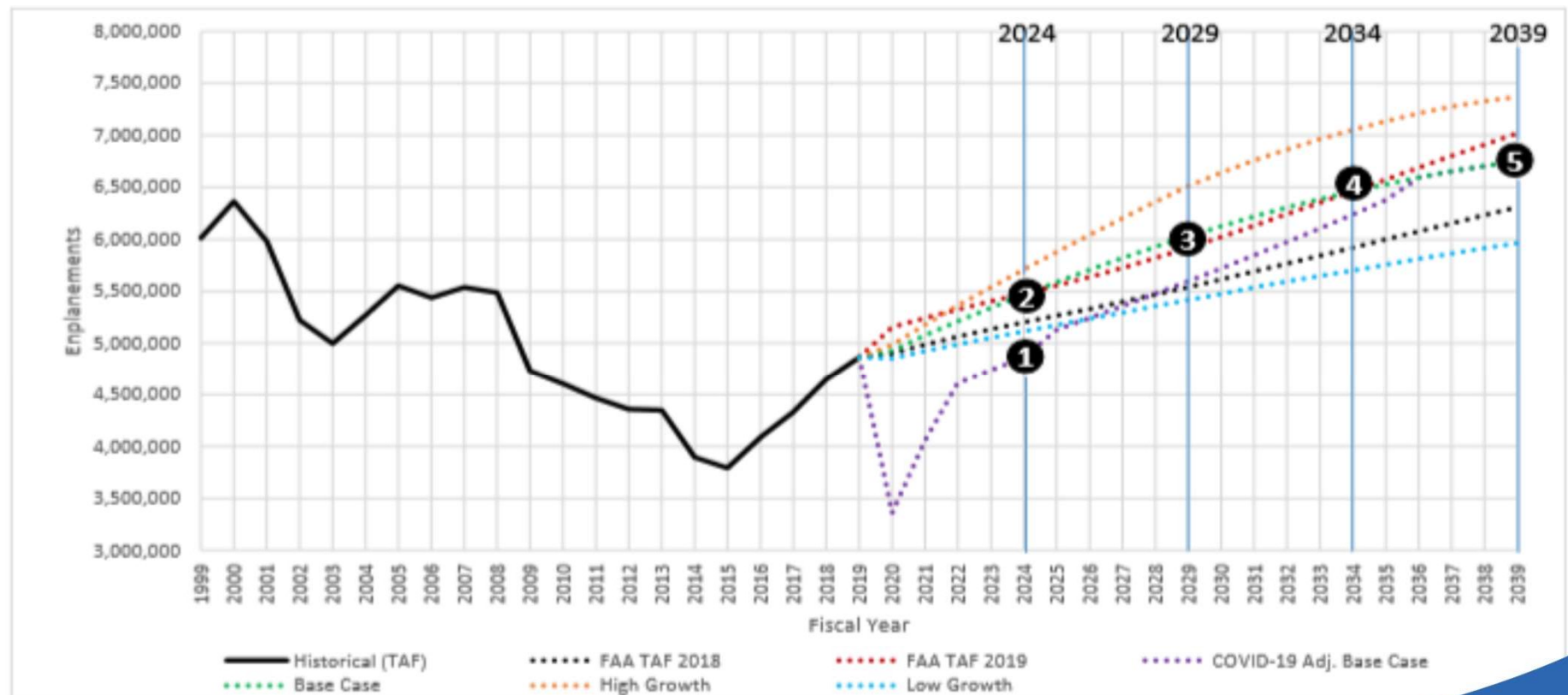
Source: TSA

# 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

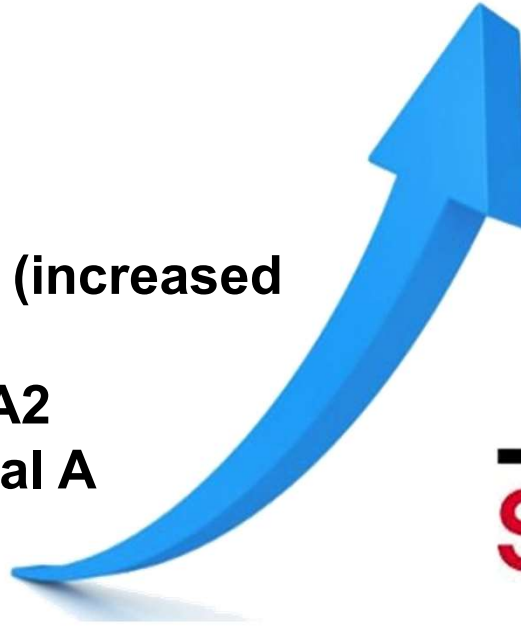
Source: RS&H

# Path to Recovery

## Financial Position

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- **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

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**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**

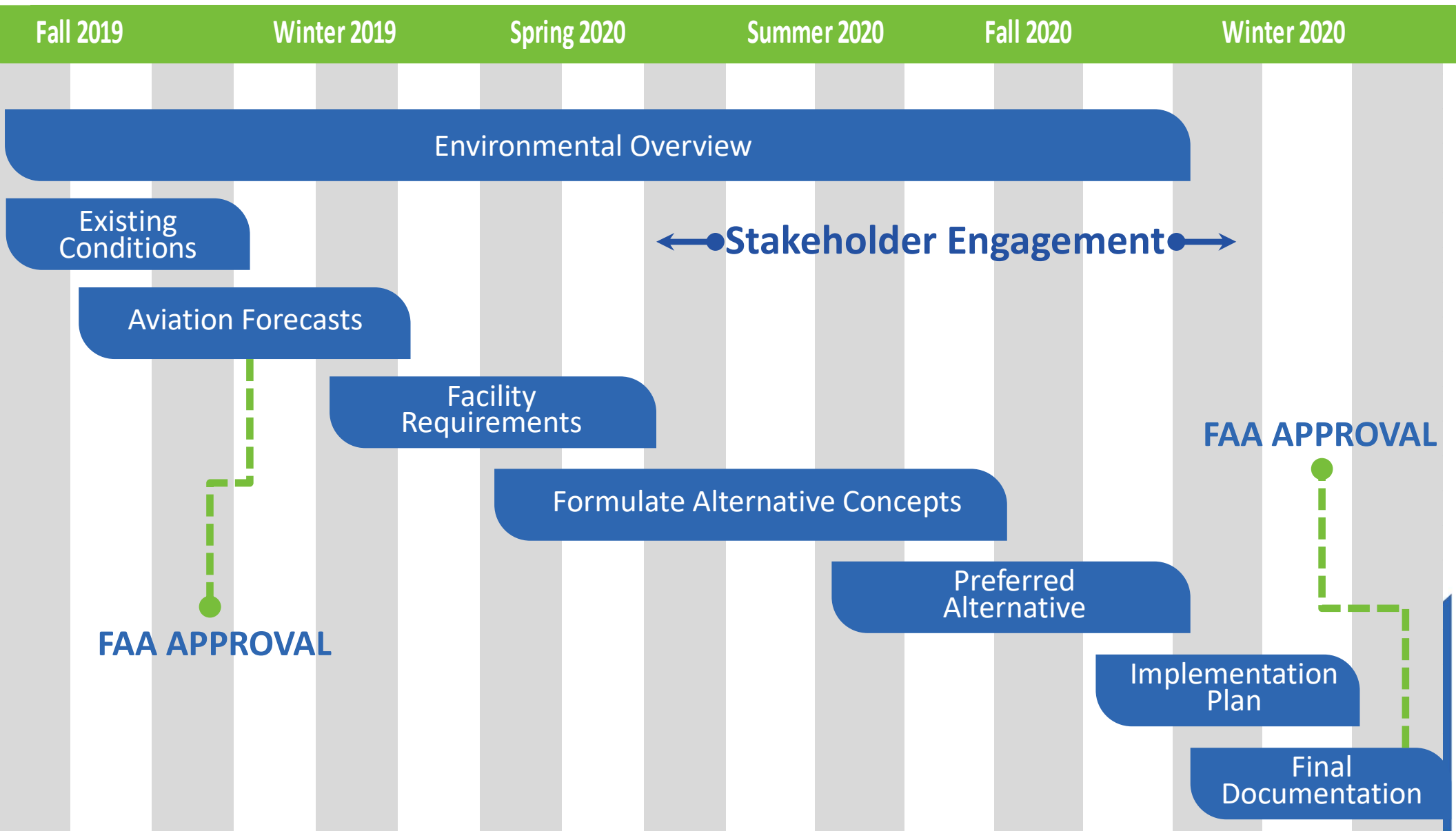
CLE's Identity and Strengths



# Path to Recovery

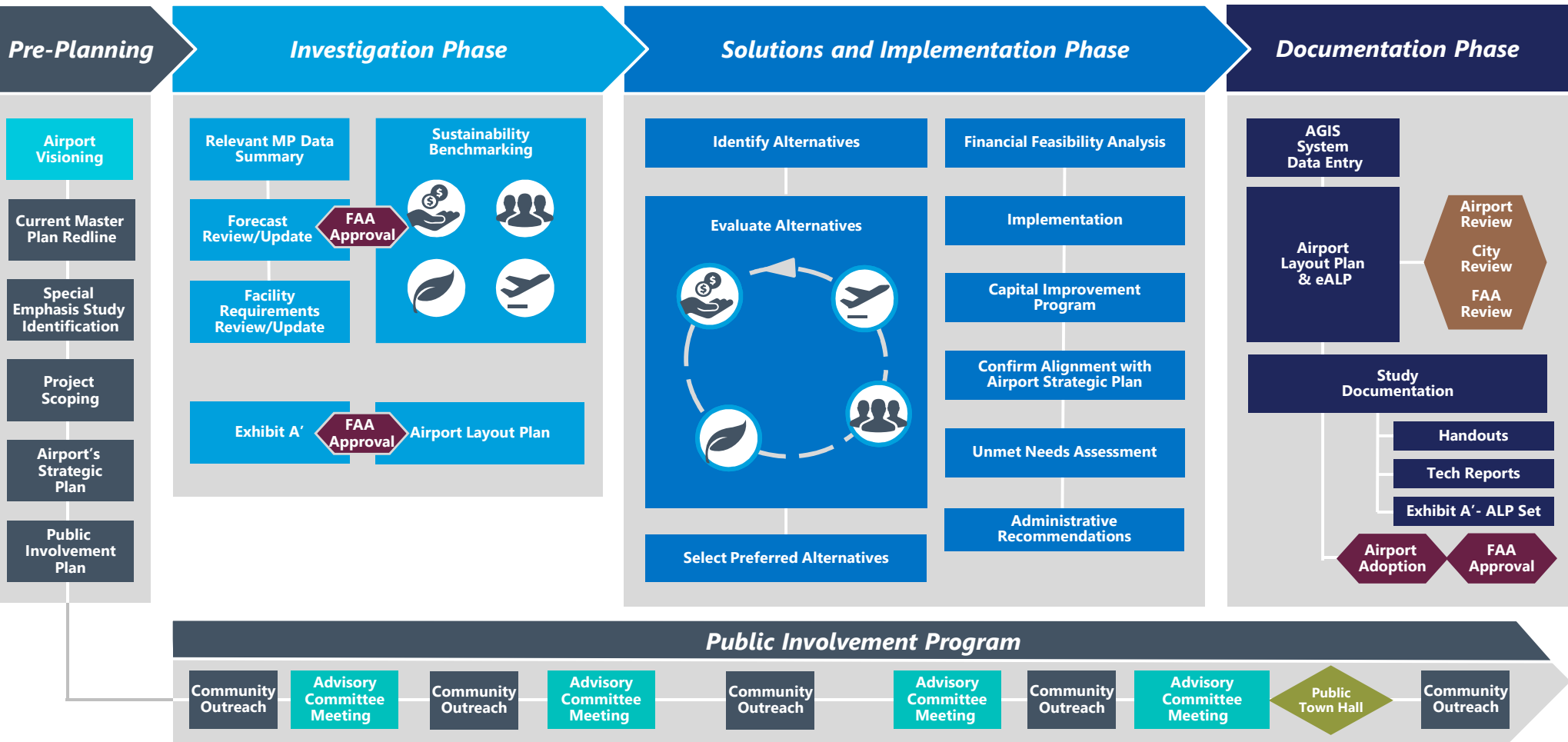
## Airport Master Plan

“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.”



# Path to Recovery

## Master Plan Process



# **Feedback Comments**

**Onsite Survey**

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

# THANK YOU!

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