

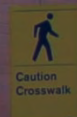


Barnstable AIRPORT HYANNIS

Airport Master Plan

*Planning Advisory Group #1
February 18, 2020*

Barnstable
Municipal Airport



Agenda

- Introductions
- How Did We Get Here?
 - 20 Years of Change
- Master Plan Background
- Planning Advisory Group Defined
- Inventory of Existing Conditions
- Environmental Overview
- Forecast of Demand
- Master Plan Website
- Next Steps

20-Years of Change – The Good

- The last airport master plan = updated in early 2000
- Completed a number of airport improvement projects
 - Leveraging **over \$73M** in grant funding
- Implemented a number of environmental enhancements
 - Green infrastructure and stormwater treatment facilities
 - 7 megawatts Solar Array to reduce our “carbon footprint”
 - Removal of underground fuel storage tanks/replaced with natural gas or above ground facilities
 - Good Housekeeping Practices
- Recently lease 26-acre parcel of airport managed land to WS Development (a.k.a K-Mart Plaza) = **\$1M in land leases in year 1!**

20-Years of Change – The Bad and the Ugly

- We also saw major declines in airport operations, passengers and revenue
 - >85% passenger activity
 - From 421,000 total passengers (FY2007) to 61,431 (FY2018)
 - >37% airport operations (landing/takeoff)
 - From 130,503 total operations (FY2007) to 81,986 (FY2018) 37.2% decrease.
- Declines =
 - Industrywide pilot and mechanic shortage
 - Increased competition from high-speed passenger ferries
 - Loss of one of our airlines in 2015 and another temporary loss in 2019

But we will rebound...

- Business Plan June 2019
- Airport Master Plan Update August 2019





Airport Business Plan

Business Plan Goals

- 4 Goals
 - 13 Objectives
 - Over 80 Tasks



- Goal A - Maximize General Aviation Activity
- Goal B - Diversity Revenue Streams
- Goal C - Become Regional Air Transportation Leader
- Goal D- Enhance Airport Image & Branding

Goal A- Maximizing General Aviation Activity at HYA

- Provide Best in Region Aviation Facilities and Experience
- Foster Aviation Education
- Identify and Create Corporate Aviation Opportunities
- Engage Recreational General Aviation Market
- ***Began working on objectives that were identified for FY2021***



Goal A- Activity Starts with Engagement



Goal B- Diversify Revenue Streams

- Identify and Formalize Revenue Streams/Sources
- Identify New Revenue Potential (Existing Streams)



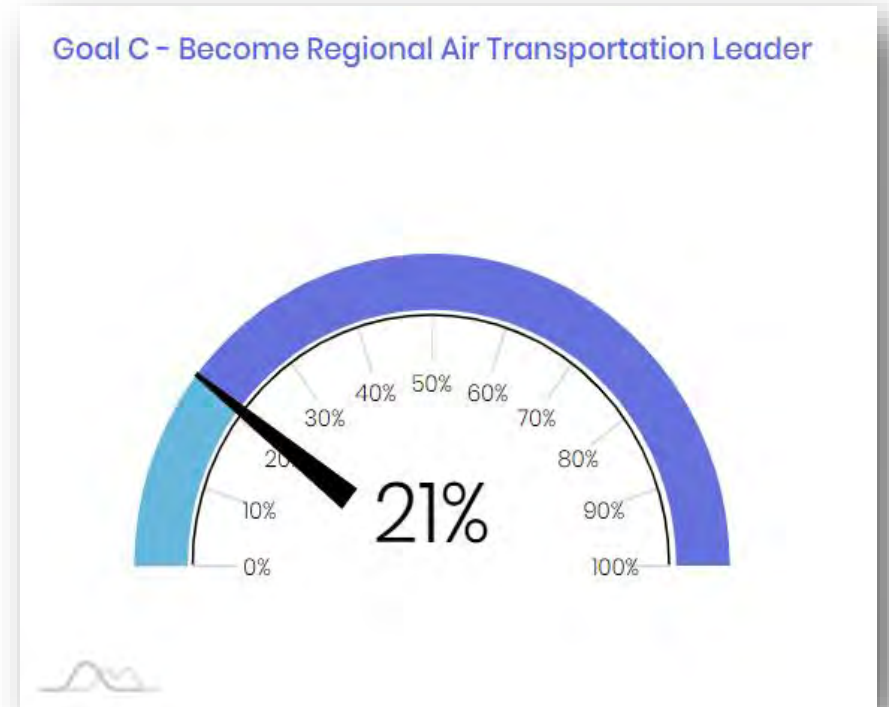
WS Landing at Hyannis

Goal B Diversity Revenue Streams



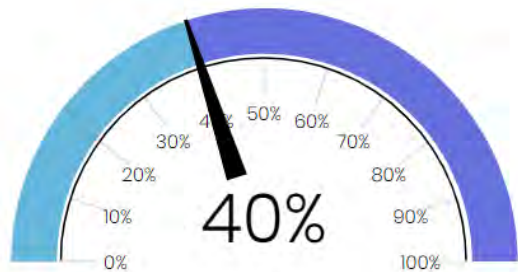
Goal C - Become Regional Air Transportation Leader

- Support Community, Business and Tourism Needs
- Establish Airport Marketing Program
- Grow Commercial Service at HYA
- ***Began working on objectives that were identified for FY2021***

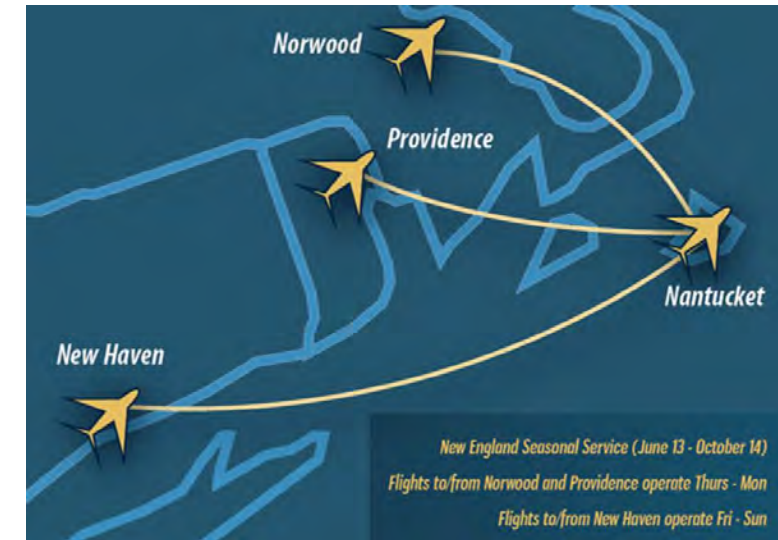


Goal C - Progress

Grow Commercial Service at HYA

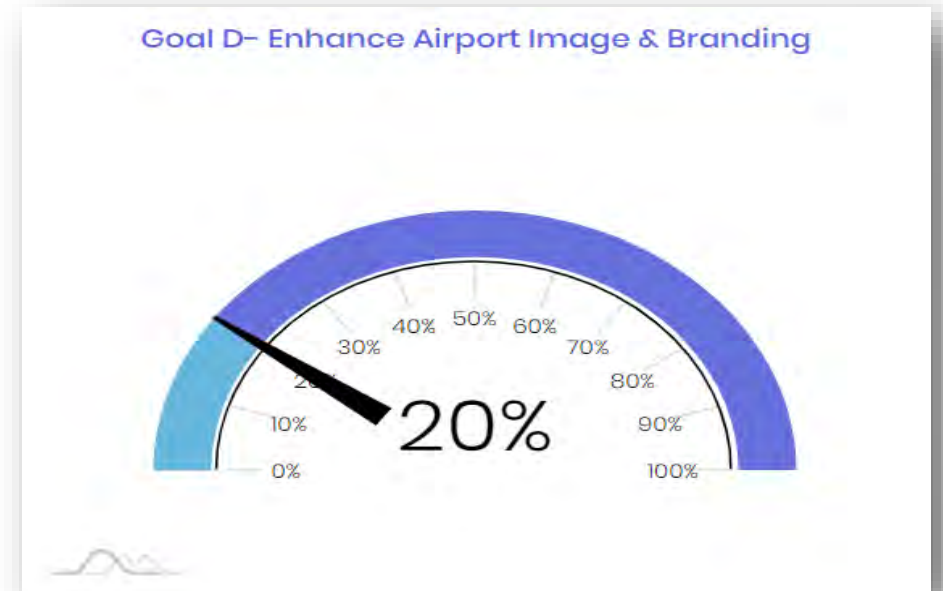


- 40% completed for FY2020 – ahead of schedule
- New Airline Starting April 17, 2020
- Southern Airways Express



Goal D- Enhance Airport Image and Branding

- Assess Current Perception of the Airport
- Define HYA Airport Brand
- Branding Implementation
- Increase HYA Community Involvement
- ***Began working on objectives that were identified for FY2021***



Even More in the Works...



- Unique opportunity
- Multi-purpose facility
 - Airport restaurant (dining)
 - Aviation museum
 - Aviation playground
 - Meeting space
 - Event/Conference space

An aerial photograph of an airport and surrounding area. The airport features a long runway, taxiway, and parking lots. The surrounding area includes a residential neighborhood with houses and trees, and a commercial area with various buildings and parking lots. A large, semi-transparent blue rectangle with a white border is overlaid on the center of the image, containing the title text. A white diagonal line runs from the top left corner towards the center of the image.

Stakeholder + Public Engagement Plan

Stakeholder Meetings

- Commercial Service
 - Booking behaviors; perceptions of reliability and cost
- General Aviation
 - Ways to connect airport with community; interest in airport restaurant
- Town/Management
 - Exploring new/additional ways to achieve synergies, esp. transportation + land use
- Branding/Image/Name
 - Exploring brand awareness both on the Cape and outside the cape for visitors

Communication Blueprint

An overarching communication plan for the airport, including:

- Objectives
 1. Enhance HYA brand and visual identity
 2. Improve awareness of HYA
 3. Broaden perceptions of HYA's role in the community
- Strategies
- Audience segments
- Messages
- Channels + Tactics
- Metrics

Implementation

- Phased approach to implementation
- Adaptable to the current airport communication needs
- Airport communication materials forthcoming
- Goal: a unified message about the airport's role, services and importance to the community



Airport Master Plan

What is a Master Plan?

- What is a Master Plan?
 - Official FAA planning document
 - Reflects the Town of Barnstable's goals for the airport
 - Depicts future airport development covering 20 years
- What Generated the Need for the Master Plan Update?
 - FAA airport design standard changes
 - Changes in activity and facility needs since last complete Master Plan (2000)
 - Changes in the aviation industry
 - Business Plan Development

Master Plan Goals



Planning Advisory Group (PAG)

- What is the Role of the Planning Advisory Group?
 - A focused committee made up of a number of different stakeholders - YOU
 - Purpose = provide necessary feedback on airport issues and guidance for various options under consideration within the master plan.
- PAG meetings:
 - Share thoughts,
 - Discuss schedule,
 - Present interim reports, and
 - Develop solutions to any challenges that present themselves during the project.

Members of Planning Advisory Group

- Town Council
- Town of Barnstable - Town Manager
- Town of Barnstable – Department Heads
- Greater Hyannis Civic Association
- Barnstable Municipal Airport Commissioners
- FAA & MassDOT Aeronautics Division
- Hyannis Air Traffic Control
- Airport Staff
- Airport Tenants
- WS Development
- Cape Cod Commission
- Cape Cod Chamber of Commerce
- Hyannis Chamber of Commerce
- Yarmouth Chamber of Commerce
- Town of Yarmouth - Town Administrator
- Woods Hole Oceanographic Institution
- Cape Cod Healthcare
- Cape Cod Young Professionals
- Cape Cod Regional Transit Authority
- MassDOT Highway District 5 - District Highway Director
- Steamship Authority - General Manager



Master Plan Process

Inventory, Forecast, and Environmental Overview

- *What do we have? (Facilities, Features and Market)*

Facility Requirements

- *What do we need?*

Alternatives

- *What options do we have?*

Implementation Plan

- *How do we implement?*

Final Report, Airport Layout Plan, and Dynamic Analysis Tool

- *What is the plan and how do we keep it current?*

Stakeholder Listening Sessions

1st Project Advisory Group Meeting

2nd Project Advisory Group Meeting

Coordination Meetings (FAA,
MassDOT, Cape Cod Commission)

1st Public Meeting (June '20)

2nd Public Meeting (September '20)

3rd Project Advisory Group Meeting

4th Project Advisory Group Meeting

Project Schedule

Task	Estimated Completion
<i>Inventory</i>	<i>January 2020</i>
<i>Environmental Overview</i>	<i>February 2020</i>
<i>Forecast of Aviation Demand</i>	<i>January 2020</i>
Capacity Analysis and Facility Requirements	May 2020
Alternatives Analysis	September 2020
Financial and Implementation Plan	November 2020
Final Airport Master Plan and Drawing Set	Winter 2020/2021
Deliverables:	
Interim Report 1	February 2020
Interim Report 2	June 2020
Draft of Final Report	November 2020
Final Document & ALP	Winter/Spring 2021

Meeting	Estimated Schedule
<i>Stakeholder Meetings</i>	<i>October 2019</i>
Project Advisory Group Meeting #1	February 2020
Project Advisory Group Meeting #2	June 2020
Public Meeting #1	June 2020
Agency Coordination	July 2020
Project Advisory Group Meeting #3	September 2020
Public Meeting #2	September 2020
Project Advisory Group Meeting #4	Late 2020



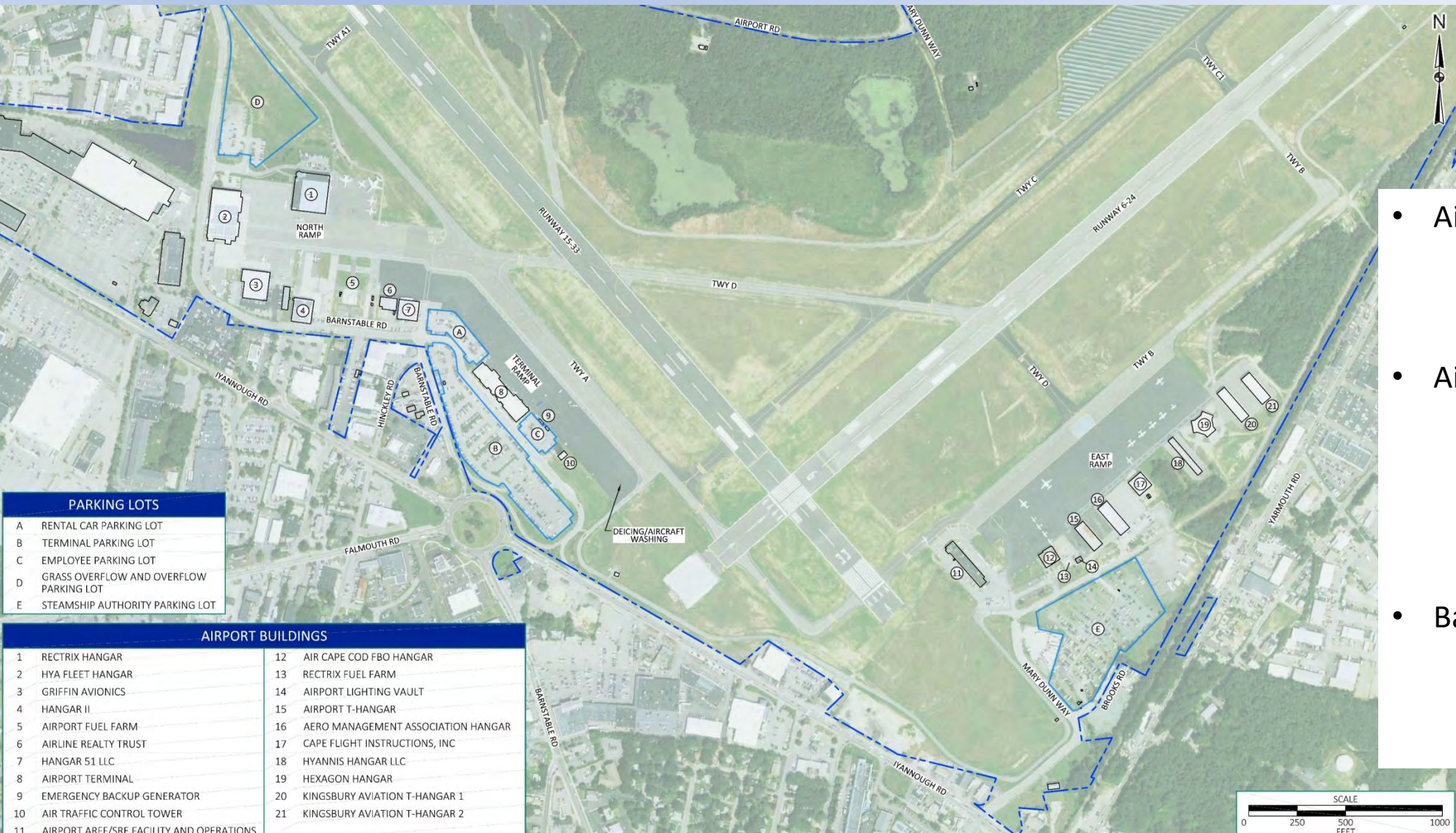
Inventory of Existing Conditions

Airside Facilities – Runways & Taxiways



- 639-acre Facility
- Runway 15-33
 - 5,253' by 150'
 - Runway 33: 150' displaced threshold
 - HIRL/PAPI – 33
 - MALSR RWY 15
- Runway 6-24
 - 5,425' by 150'
 - Runway 6: 406' displaced threshold
 - HIRL/PAPI – 6, 24
 - MALSF RWY 24
- Taxiways
 - Taxiways A, C: Parallel Taxiway
 - Taxiway B: Partial Parallel Taxiway
 - Taxiways A1, C1: Stub Taxiway
 - Taxiway D: Crossover
 - Taxiway E: Run-Up Pit
- Visual/Weather
 - Segmented circle and windsock
 - ASOS/SAWS

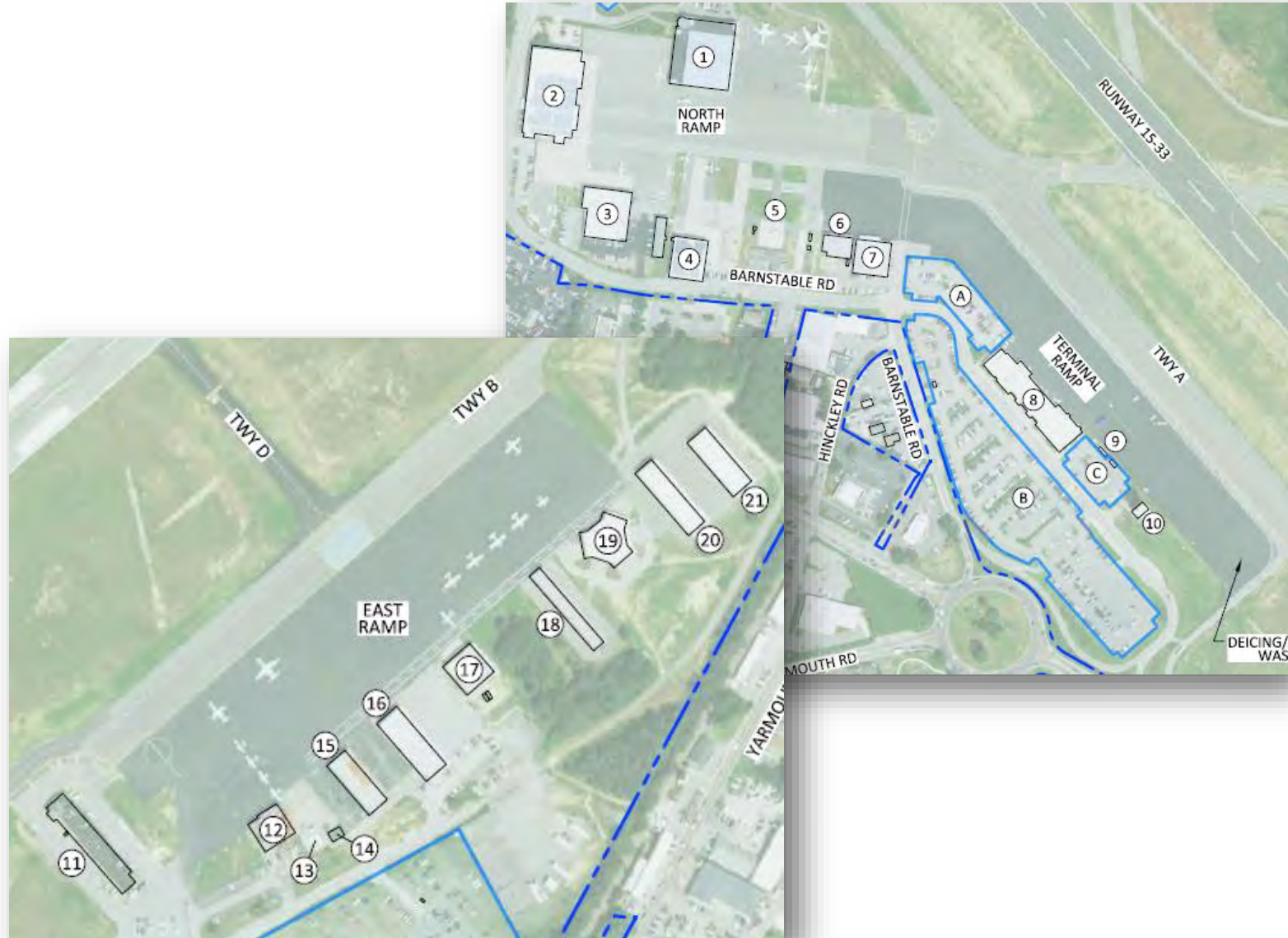
Tenants & Businesses - Aviation



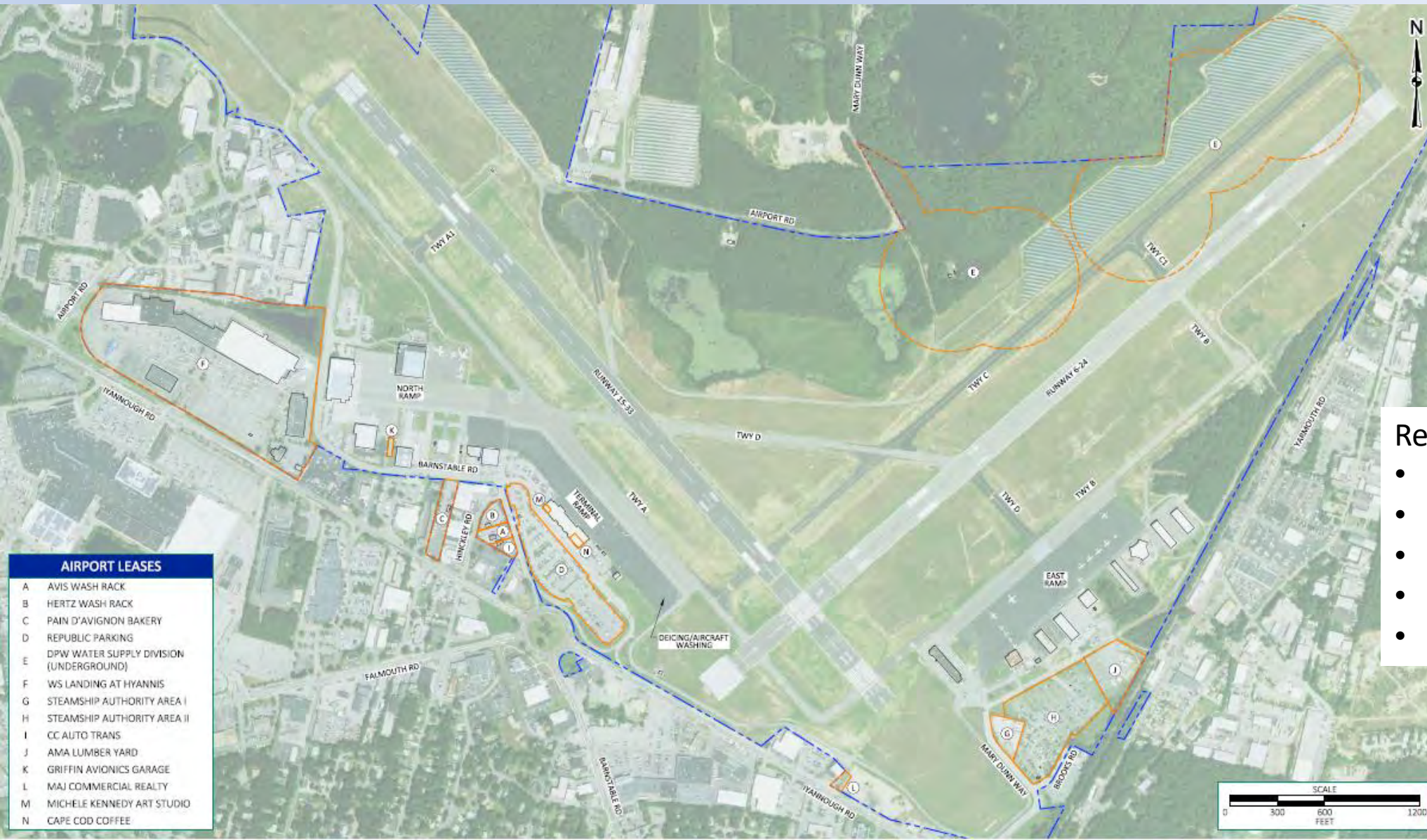
- Airport Facilities
 - Terminal Ramp
 - North Ramp
 - East Ramp
- Airport/FBO Services
 - Fuel (100LL/Jet A)
 - Car Rentals
 - Aircraft/Avionics Repair
 - Deicing
- Based Aircraft
 - 31 Single Engine
 - 16 Multi-Engine
 - Cape Air

Landside Facilities – Tenants/Businesses

Building	Owner (Lessee)
1	Ross Rectrix Aerodrome Center
2	HYA Fleet Hangar (Leased by Hyannis Air Service AKA Cape Air and Nantucket Airlines)
3	Griffin Avionics
4	HYA Hangar II (Leased Cape Air)
6	Airline Realty Trust (Leased by Allies Aviation)
8	Hangar 51 LLC (Leased by Allies Aviation)
12	Air Cape Cod
15	Airport T-hangar
16	Aero Management Association (AMA), Inc
17	Cape Flight Instruction Inc.
18	Hyannis Hangar LLC
19	Hexagon Hangars (Privately Owned)
20	Kingsbury Aviation
21	Kingsbury Aviation



Landside Facilities – Tenants/Businesses



Revenue Supporting: —

- Rental Car Wash Racks
- Restaurants
- Parking
- WS Landing at Hyannis
- Solar Farms

Economic Impact of HYA

Item	2019	2014	Change
Jobs	1,724	2,135	-411 (19%)
Payroll	\$73.8M	\$85.3M	-\$11.5M (13%)
Output	\$157.2M	\$208M	-\$50.8M (24%)
DIRECT	\$91.3M	\$119.2M	-\$27.9M (23%)
INDIRECT	\$65.9M	\$88.7M	-\$22.8M (26%)

- MassDOT regularly studies economic impact of airports
- 2019 update showed declines at HYA
- HYA Business Plan developed to address these items



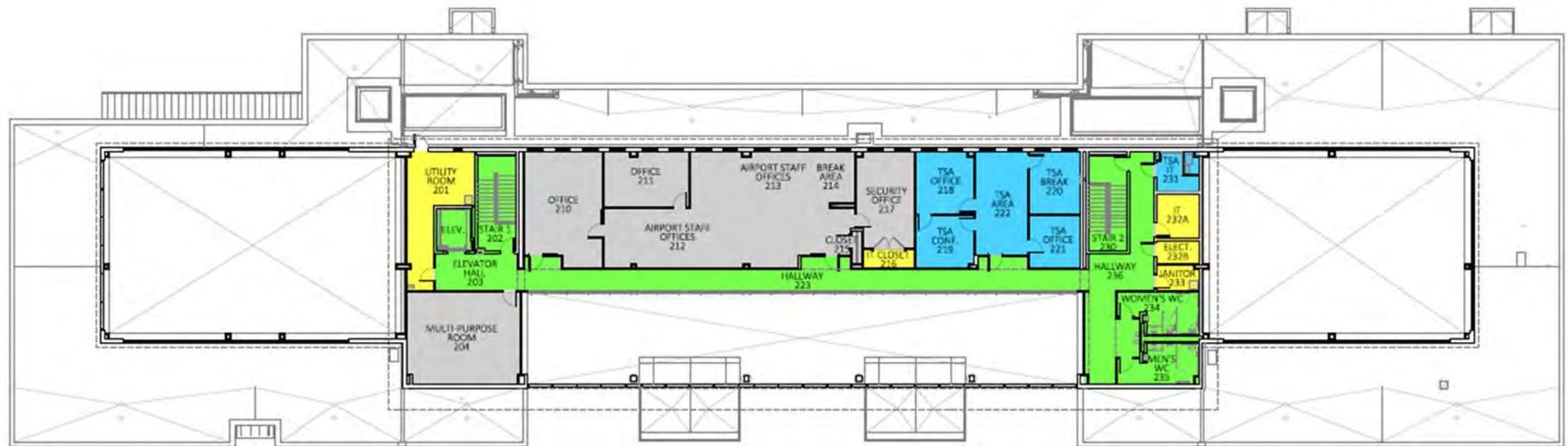
Terminal Building – First Floor



AREA	SYMBOL	SQUARE FEET
FIRST FLOOR TOTAL	N/A	26,600
AIRLINE OFFICES & OPERATIONS AREAS		2,035
AIRPORT MANAGEMENT & OPERATIONS		745
BAGGAGE CLAIM		1,385
BAGGAGE MAKE UP & SCREENING		2,000
CONCESSIONS		3,065

AREA	SYMBOL	SQUARE FEET
HOLDROOMS		4,550
PASSENGER SCREENING \ TSA		1,320
PUBLIC \ CIRCULATION		8,425
SUPPORT AREAS		705
TICKETING \ CHECK-IN		1,635

Terminal Building – Second Floor



AREA	SYMBOL	SQUARE FEET
SECOND FLOOR TOTAL	N/A	6,435
AIRPORT MANAGEMENT & OPERATIONS		2,625
PASSENGER SCREENING \ TSA		985
PUBLIC \ CIRCULATION		2,055
SUPPORT AREAS		540

More than Just a Terminal



Key Issues

- No Direct Roadway Access
- Validate Previously Proposed Runway 15-33 Extension
- Obstruction Clearance
- Aeronautical Development
- Review Geometry
- Non-Aviation Revenue



An aerial photograph of an airport. A long runway runs diagonally from the top left towards the bottom right. To the left of the runway is a large, dark, irregularly shaped area that appears to be a pond or a wetland. The surrounding landscape is a mix of green fields, some trees, and some buildings. In the bottom left corner, there is a small, faint logo that says "Google Earth".

Environmental Overview

Airport History

- Created in the 1930's
- Used by the U.S. Navy during WWII
- Conveyed to Town of Barnstable in 1948 for use as an airport
- Airport Manages 639 acres, 140 acres of which are paved for runways, taxiways, aprons, parking lots, rooftops and roads as an Enterprise Fund of the Town of Barnstable



Environmental Achievements & Stewardship

- A number of environmental enhancements were recently made in 2011 with the creation of the new terminal and access road including:
 - Green infrastructure and stormwater treatment facilities for road and parking areas.
 - Treatment of stormwater that drains to Upper Gate and Lewis ponds and on the North Ramp using Vortech Stormwater Treatment Systems - a shallow treatment unit that traps and retains trash, debris, and sediment from stormwater runoff.



Environmental Achievements & Stewardship (Cont.)

- 7 megawatts Solar Array to reduce our “carbon footprint” and lower energy costs for the Airport’s annual electricity needs
- Good Housekeeping Practices:
 - No pesticide use
 - No road salt on runways
 - No chemicals used to treat runways/taxiways in snow ice conditions
 - Spill prevention and stormwater management plans
 - Regular hazardous materials inspections



Environmental Achievements & Stewardship (Cont.)

- Removal of a 20,000 gallon underground JetA fuel tank
 - Replaced with a new aboveground Fuel Farm with Secondary Containment and Monitoring
- Removal of a 250 gallon underground diesel tank
 - Replaced with Natural Gas-Powered Airport Emergency Generator
- Installation of an Aircraft Washing and Deicing Pad that drains to the Barnstable WW Treatment Plant



Hazardous Materials and Pollution Prevention

- **Pollution Prevention**

- Plan in Place for 20+ Years
- January 2020 – Airport updated Stormwater Pollution Prevention Plan (SWPPP) & Spill Prevention, Control, and Countermeasure Plan (SPCCP)
 - SWPPP identifies potential sources of stormwater pollutants & methods to minimize/eliminate potential for off-site discharge of stormwater pollutants
 - SPCCP identifies bulk fuel storage and transfer locations at Airport facilities and provides information critical to the prevention of, and response to, releases of OHM.
- Inventories completed quarterly and annually

Hazardous Materials and Pollution Prevention

- **Spill History**

- On average, the Airport safely pumps over **850,000 gallons** of Jet fuel annually.
- In the past 5-years with over **4,250,000 gallons dispensed**, the airport has had **1 reportable spill**.
 - November 2019 – 51 gallons of Jet A fuel (Tank Farm) **(0.001%)**
 - Contained with no discharge of pollutants to stormwater and/or surface waters.



Active MassDEP Reported Releases at the Airport

- Per- and polyfluoroalkyl substances (PFAS) in soil and groundwater from historic application of AFFF
 - Current usage and restrictions
- 1,4-dioxane in groundwater
 - Source currently unclear
- Previous assessments for OHM
 - floor drain leaching pits (North Ramp hangars)
 - leaking underground storage tank (UST) (former Operations Building)
 - Removal & remediation actions to date
 - Ongoing groundwater monitoring



Use of Aircraft Fire Fighting Foam (AFFF) at the Airport

- Aqueous Film Forming Foam (AFFF) which has PFAS - Used for emergency responses
- *Required by the FAA.*
- *Currently - no other options approved for use are allowed by the FAA*
- Historically, AFFF used during:
 - Triannual training exercises
 - Annual testing of fire fighting equipment as required by the FAA
 - Responses to emergencies

Use of Aircraft Fire Fighting Foam (AFFF) at the Airport

- Since 2015 no foam used for exercises or testing
- Foam used in 2016 to respond to aircraft accident
 - Parking lot/flammable liquids/fire/foam blanket
 - 10 gallons of foam applied at the site of the accident
 - All captured in an enclosed catch basin, vacuumed out and removed from site.



Use of Aircraft Fire Fighting Foam (AFFF) at the Airport

- Airport purchased the first Ecologic Cart used by a Commercial Service Airport in MA
- Unit purchased before receipt of FAA approvals for use
- Eliminates the need for the airport to use and deploy foam during annual FAA required fire fighting equipment testing



Active MassDEP Reported Releases at the Airport

- PFAS in soil and groundwater from historic application of AFFF
- Two On-Airport PFAS Mitigation Areas
- 1,4-dioxane in groundwater
- Residual Petroleum Related Impacts at the North Ramp



- Of the 639-acre facility = 2.25-acres have been impacted by historic use



Sources of PFAS



CARPETS



CARPET CLEANING PRODUCTS



FOOD PACKAGING



CLEANING PRODUCTS



FURNITURE



SHAMPOO & CONDITIONER



COSMETICS



OUTDOOR GEAR



CLOTHING



FIREFIGHTING FOAM



ADHESIVES & SEALANTS



CAR WAX



PROTECTIVE COATINGS



NON-STICK PANS



CARSEATS

Wetlands and Aquatic Resources



Freshwater Ponds

- Upper Gate Pond
- Lewis Pond
- Mary Dunn Pond
- Lamson Pond

Isolated Vegetated Wetlands Potential Vernal Pools



Threatened and Endangered Species

Federally Listed Species

- Northern Long-eared Bat
- American Chaffseed



Photos by MA Division of Fisheries & Wildlife

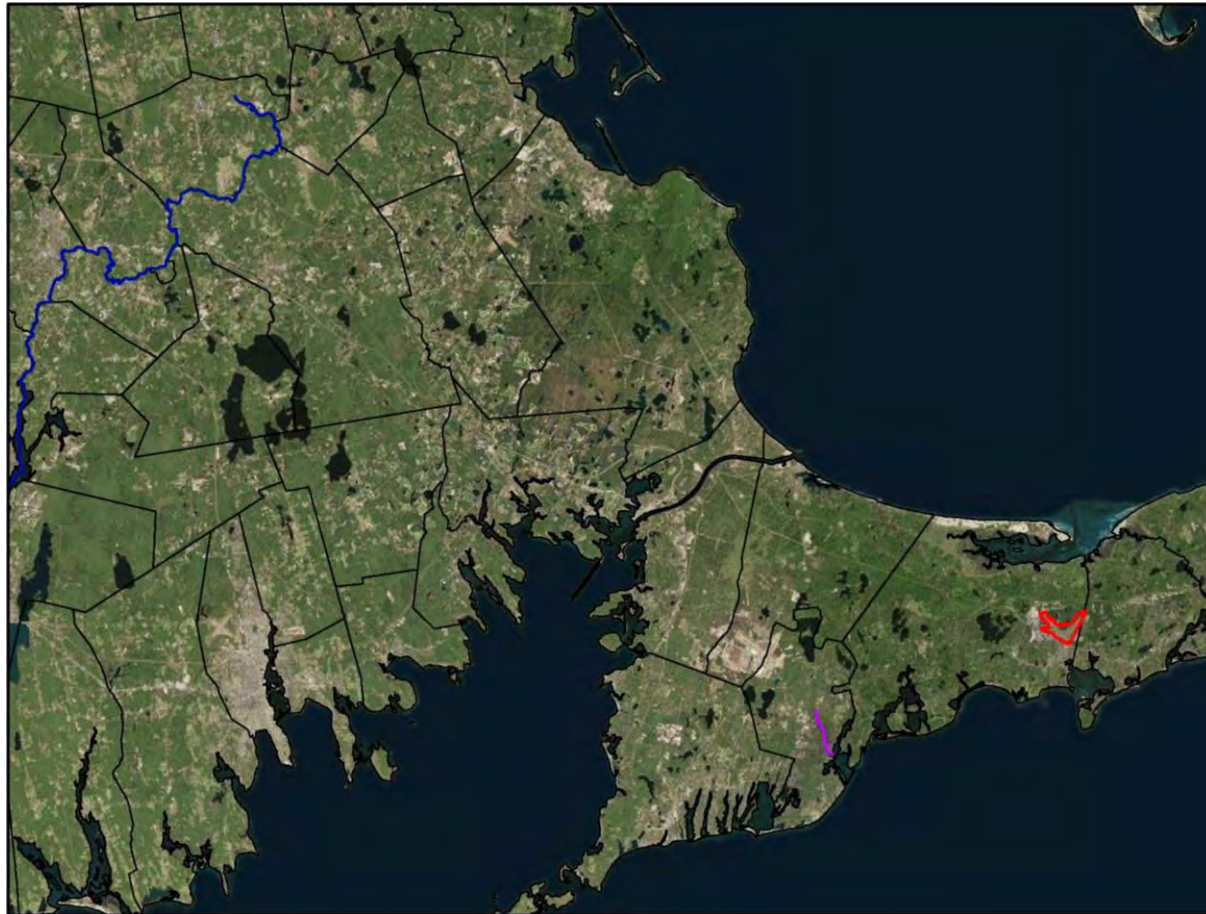
State Listed Rare Species Habitat

- Mary Dunn & Lamson Ponds



Areas/Features Non Impacted

- FEMA Flood Zones
- Wild and Scenic Rivers



An aerial photograph of an airport, showing runways, taxiways, and surrounding land. A semi-transparent blue overlay covers the right side of the image, and a white diagonal stripe runs from the top left towards the center. The text "Forecast of Demand" is written in a large, white, italicized serif font within a white-bordered box on the blue background.

Forecast of Demand

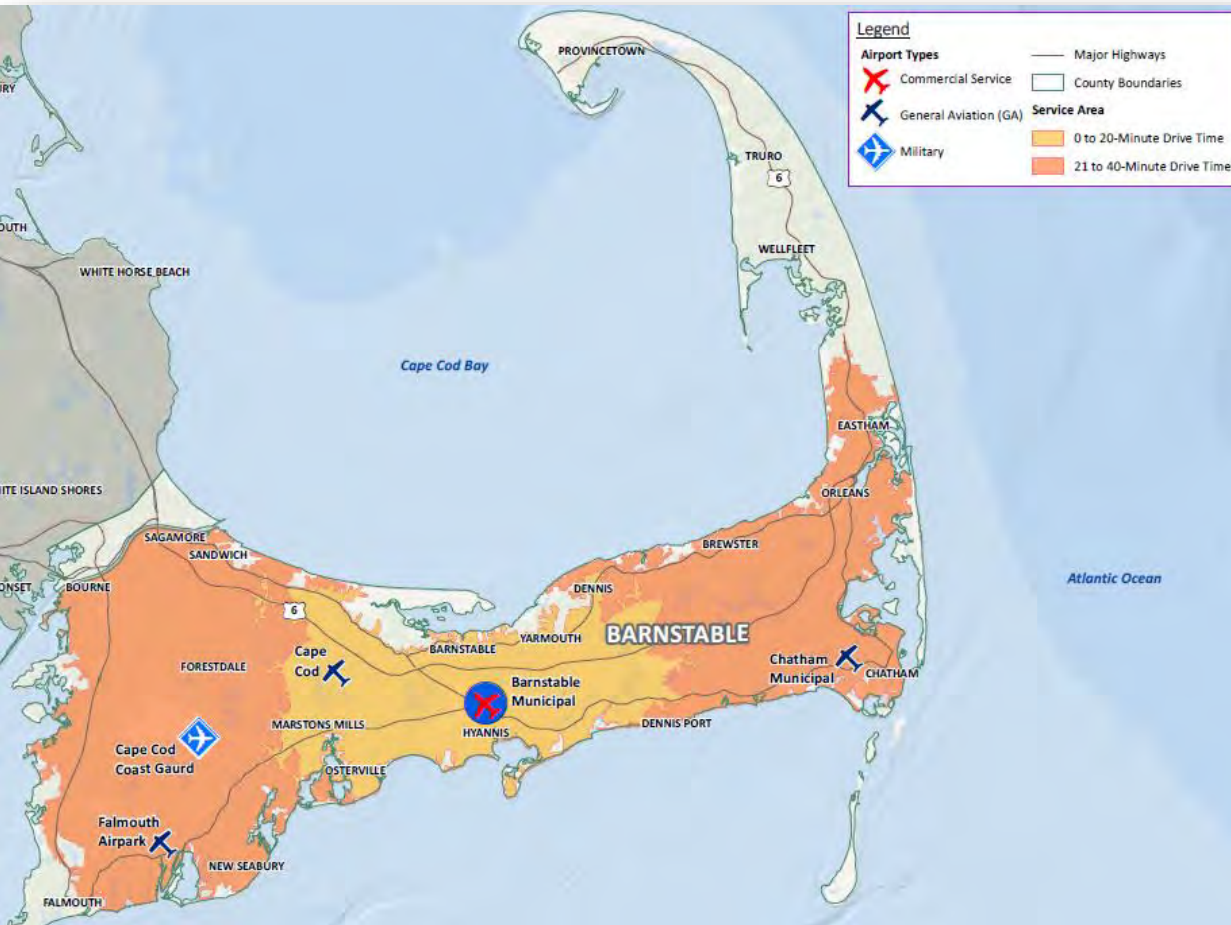
General Aviation Trends



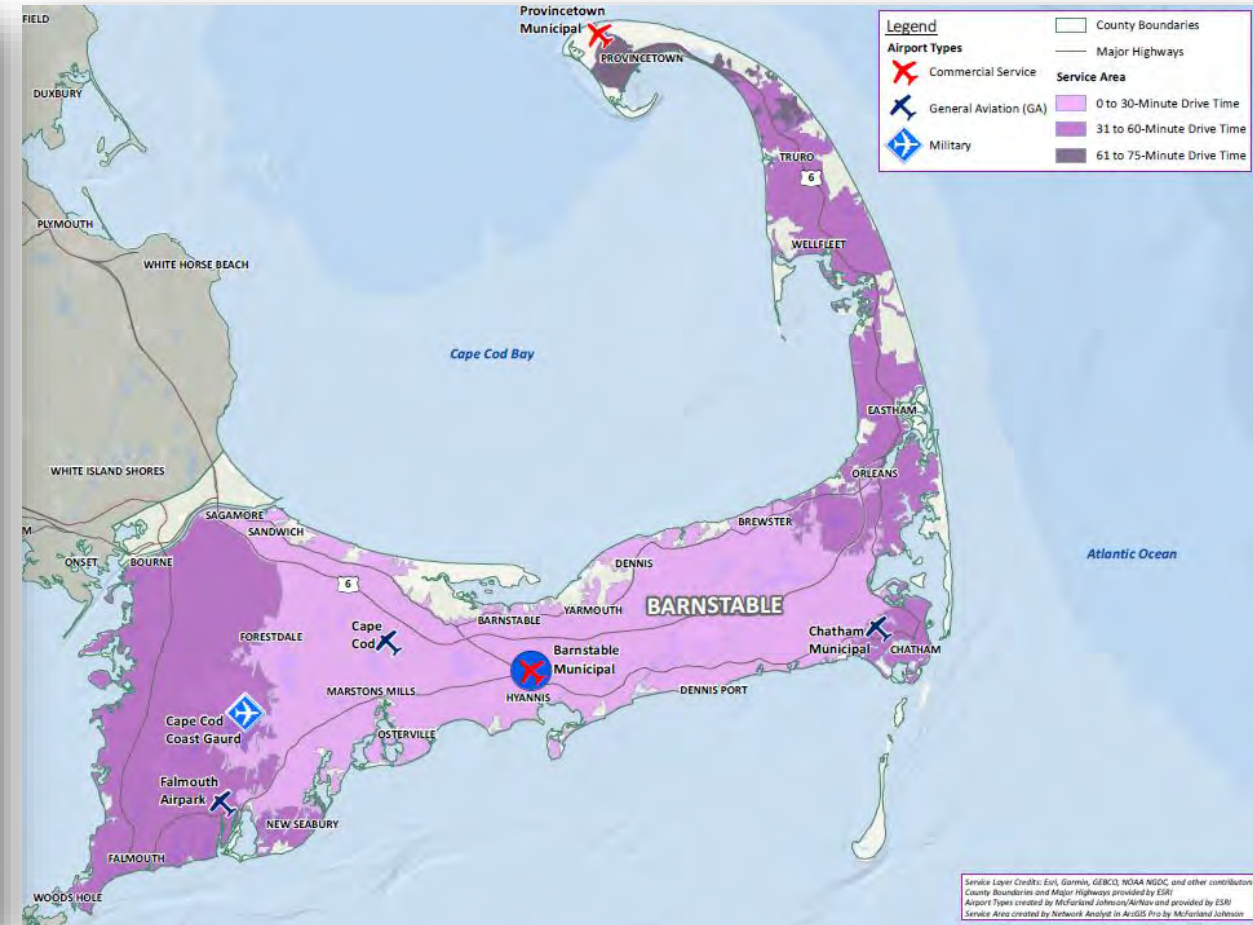
- Growth in Jet and Turbo Prop Aircraft
- Flying Clubs and Fractional Light GA Ownership
- Decline in Single and Multi-Engine Piston Aircraft
- Increase in Business GA Activity
- Decrease in Recreational GA Activity
- Increase in Fuel Prices

General Aviation – Service/Market Area

Light GA Service



GA Jet Service



General Aviation – Operations

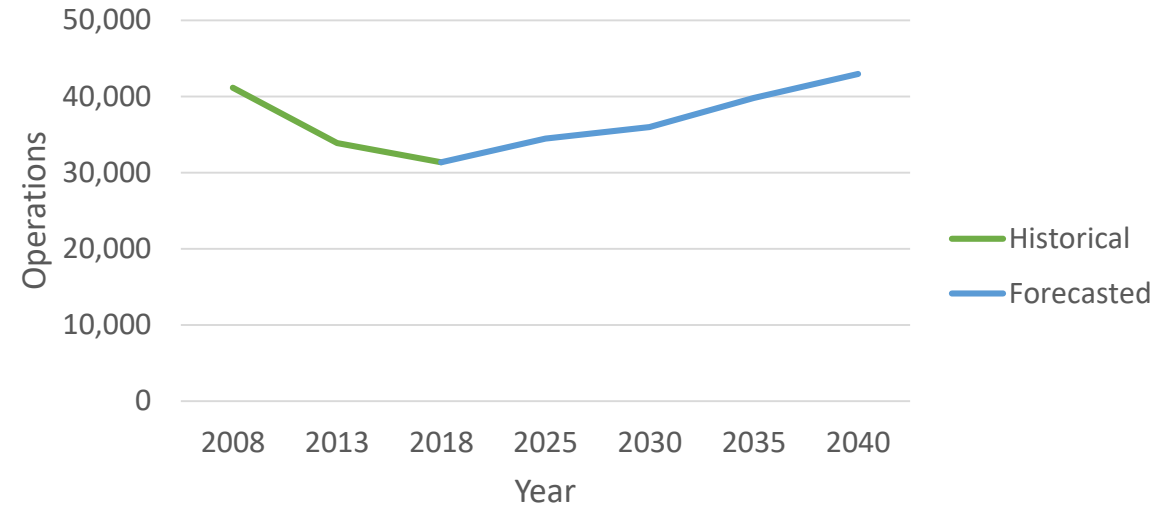
Forecast Methodologies

Itinerant:

- Blended TAF NE Region Market Share and National Growth Rate
- AAGR = 1.49%

Local:

- Blended 10-Year Trend Analysis and National Growth Rate
- AAGR = 1.31%



Baseline Operations Forecast

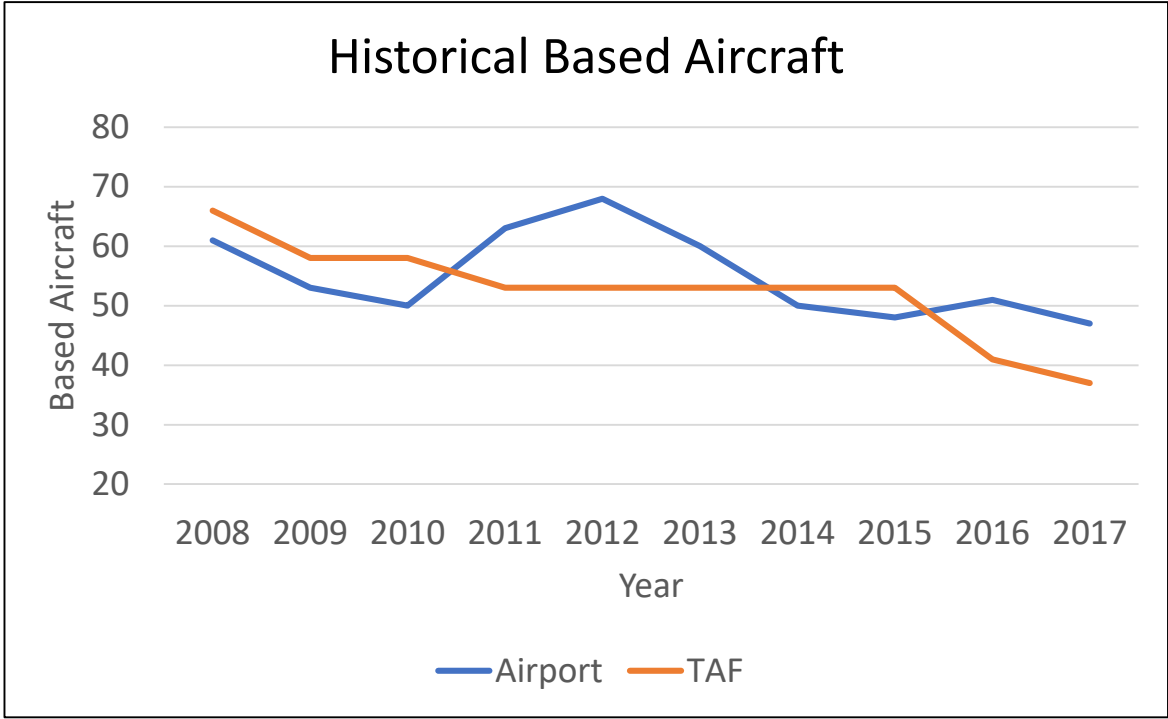
Year	GA Itinerant Operations	GA Local Operations	Total GA Operations
2018	22,340	9,009	31,349
2025	24,639	9,800	34,439
2030	26,514	10,447	36,961
2040	30,956	11,985	42,941

Decline in operations in the 10 years from 2008 to 2018, sharpest decline during following 9/11 and 2008-2010 recession.

Lack of Interest in Professional Pilot Careers Following 9/11 and Regional Airline Expansion (Low Pay)

Forecasted numbers show that GA operations will get back to 2008 operations by end of planning period.

General Aviation – Based Aircraft



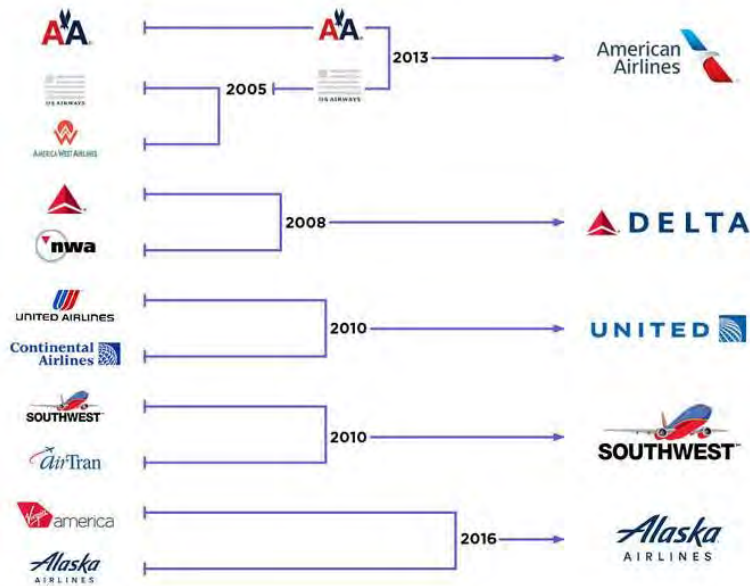
The FAA National Aerospace Forecast was used to calculate the based aircraft forecast.

*** 10 Multi-Engine AC were added to historical and forecasted numbers to account for Cape Air AC that RON regularly.**

Based Aircraft Forecast

Year	Single Engine	Multi-Engine	Jet	Total
Baseline	31	16	0	47
2025	29	17	0	46
2030	27	17	1	45
2040	25	17	1	43

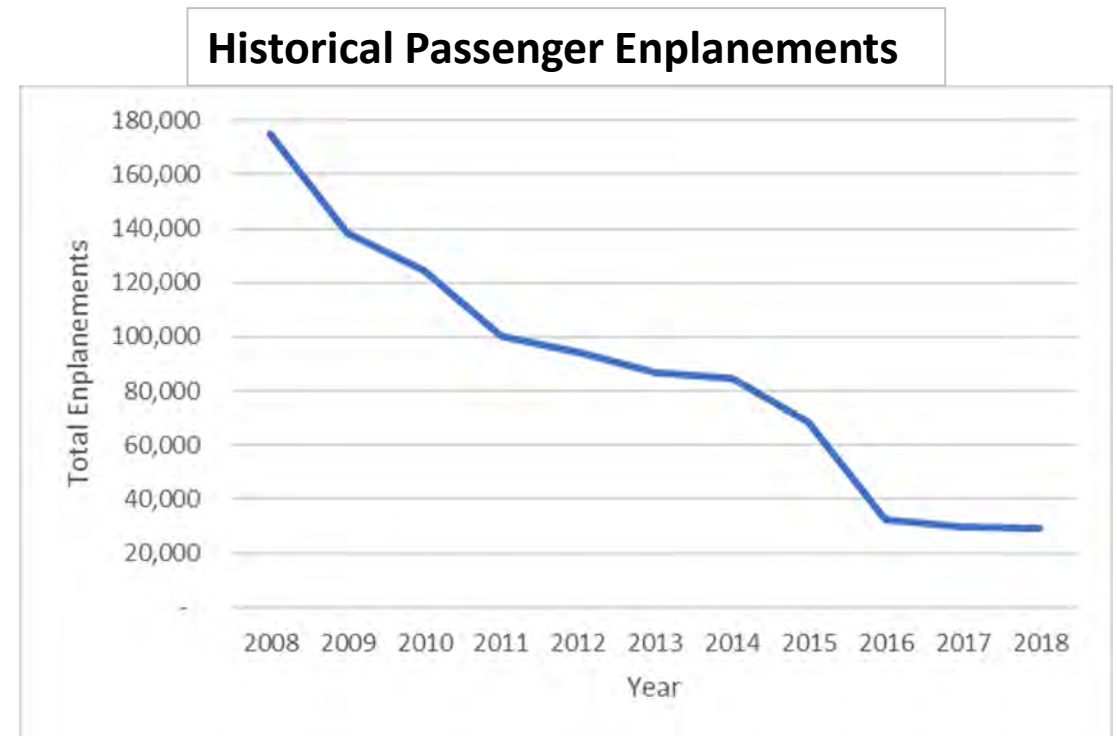
Commercial Aviation Trends



- Reduction/Removal of Turboprop Aircraft
- Up-Gauging to Larger Aircraft
- Decreasing Frequency
- Increased Congestion at Hub Airports
- ULCC and LCC Presence at Smaller Airports
- Causes: Pilot Supply, Fuel Prices, Competition, Airport Capacity and Costs (Hubs)

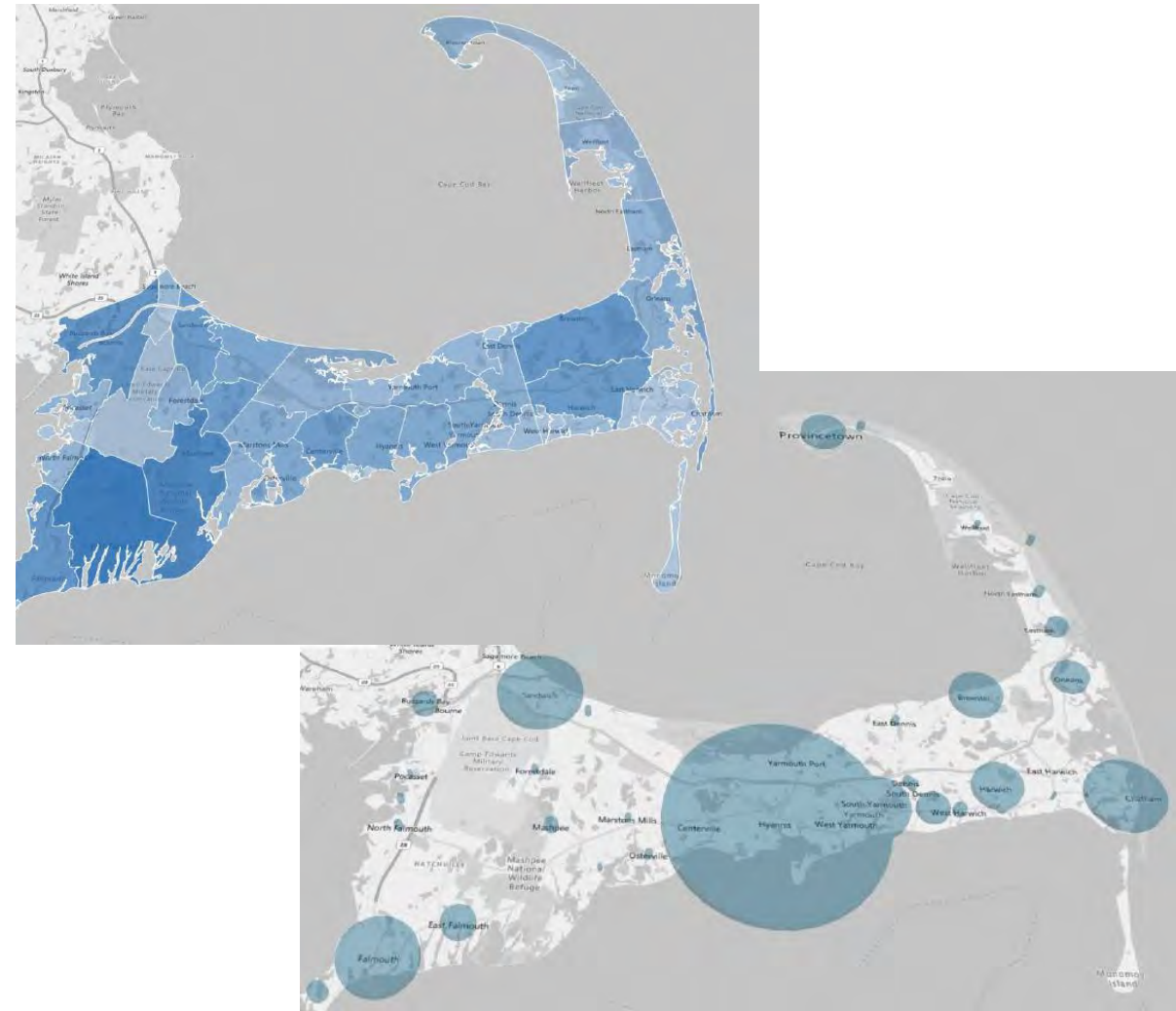
Enplanement History

- 1990's Had Feeder Airlines from Several Network Carriers to BOS
- Last Non-JetBlue Network Carrier, Colgan (US Airways) Left in 2009
- Steady Decline in Island Markets
 - High Speed Ferry Service
 - Island Air Bankruptcy in 2016
 - Pilot Shortage and Fuel Causing Continual Decline in Frequencies
- Stable JetBlue Service
 - Fluctuations in Shoulder Seasons



Passenger Market Research

- Passenger Booking and Inbound Market Data
 - 40 Mile Radius, Used Zip Codes & Census Tracts to Identify Cape-Only
- Outbound Market Using Credit Card Booking Data
- Inbound Market Using Inverse Plus Credit Card Transactions



Passenger Market Research

- Outbound vs. Inbound Traffic, Airport Choice Based on Credit Card Transactions
- Total Cape Market Size = 215,000 Enplanements... Nearly 600/Day!

Originating Airport	Passengers	Passengers2	Passengers3	Passengers4	Passengers5
Quarter	1	2	3	4	Totals
ACK	-	1	7	-	7
ALB	56	27	16	24	123
BDL	851	895	1,004	841	3,590
BOS	41,937	45,233	40,973	44,330	172,474
EWR	369	402	473	369	1,613
HPN	46	34	51	38	169
HYA	16	249	1,025	15	1,305
ISP	28	17	22	22	89
JFK	566	583	775	522	2,446
LGA	274	307	372	282	1,235
MHT	528	570	376	459	1,932
MVY	25	225	1,331	114	1,696
ORH	91	90	80	89	349
PSM	85	53	21	47	206
PVC	56	57	170	45	328
PVD	5,701	5,676	4,427	4,825	20,629
PWM	20	18	12	33	83
SWF	1	1	1	-	3
Totals	50,651	54,439	51,139	52,058	208,277

Quarter	1	2	3	4	Totals
Airport Utilized	Passengers	Passengers	Passengers	Passengers	Passengers
ACK		161	960	5	1,126
ALB	6	16	28	19	68
BDL	490	653	749	873	2,764
BGR	17	48	98	32	194
BOS	28,373	48,779	55,783	45,762	178,698
EWR	431	422	315	544	1,712
HPN	33	48	43	64	188
HVN	4	3	2	4	12
HYA		1,080	3,490	57	4,626
ISP	34	49	36	50	169
JFK	527	512	390	632	2,061
LGA	627	601	420	710	2,358
MHT	208	390	602	386	1,586
MVY	22	1,705	8,290	212	10,228
ORH	18	40	61	67	185
PSM	18	43	79	48	187
PVC	24	338	824	88	1,273
PVD	2,090	3,645	4,480	3,557	13,772
PWM	3	25	104	22	154
SWF	3	5	4	5	17
Grand Total	32,925	58,562	76,755	53,134	221,376

Passenger Market Research

- Cape-Originating Demand is Consistent Year Round
 - Peak Season is Third Busiest Quarter
 - Inbound Peaks in Summer (Doubles) but Likely not as Sharp as Drive Market
- Boston Captures Vast Majority of Cape Traffic at 85%, Providence 10%
 - Cape-Coddors Programmed Behavior to take the Bus
- Summer Spike in Cape Traffic Using MVY
 - Real or Data Skew?
- Current Market Retention is approx. 1.3%
- Even 50% Retention is Unrealistic
 - PVD with 10 Airlines 22 Nonstop Destinations Still Leaks Significant Traffic to Boston

Passenger Market Research

- Reviewed Incremental Improvements in Market Retention
- Added Other Traffic (Cape Air, Rectrix etc.) to Form “Upper Bound”

Year	Market Recapture Low (+1%/y)		Market Recapture High (+2%/y)		Blend	
2020	2,965	1.38%	2,965	1.38%	2,965	1.38%
2025	13,926	6.38%	24,839	11.38%	19,383	9.02%
2030	24,839	11.38%	46,666	21.38%	35,753	16.64%
2040	46,666	21.38%	90,318	41.38%	68,492	31.88%

Year	Other Traffic (9K/Air Taxi)	Plus Blended Recapture
2020	23,225	26,190
2025	22,365	41,747
2030	21,294	73,416
2040	21,065	89,557

Forecast Scenarios

- New Summer Seasonal Carrier
 - 3 Months of 1x Daily 76-Seat Regional Jet (i.e. AA or DL E-175 to LGA/JFK)
- New Year-Round Carrier
 - Twice Daily 66-Seat Regional Jet (i.e. UA CR7 to IAD)
- New Ultra Low Cost Carrier
 - Twice Weekly Seasonal Service to Florida on (i.e. Allegiant A320 to Orlando)
- Market Interruption – 10% Drop with 5-Year Incremental Recovery
 - 9/11, Great Recession, Airline Bankruptcy etc.



Year	New Summer Seasonal	New Year-Round Regional	New ULCC	Combined
1	5,335	30,888	7,363	43,586
5	5,609	32,535	9,629	47,773
10	6,357	35,556	12,461	54,373
20	7,538	40,360	18,125	66,023

Passenger Market Opportunity

- Scenarios Sized Well to Match Market Opportunity
- While Well Below Historical Levels, These Enplanements Would Represent Greater Economic Potential Compared to Inter-Island Passengers

Year	Upper Bound	Baseline	“Opportunity”	Scenario Max
2020	26,190	26,190	N/A	N/A
2025	41,747	25,330	16,417	47,773
2030	57,477	24,690	32,787	54,373
2040	89,557	24,030	65,527	66,023

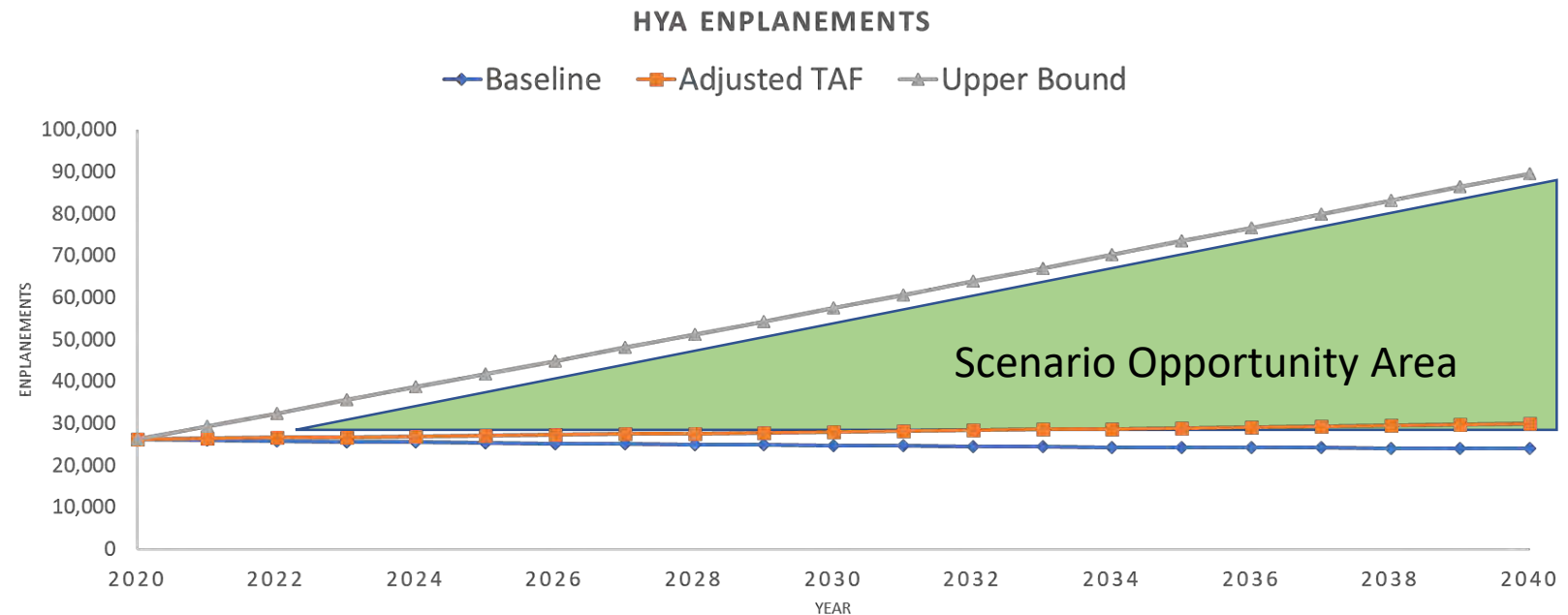
Baseline Forecast and TAF

- TAF – Terminal Area Forecast (Not the Weather Kind)
 - Generic Forecast Created by FAA Used as a Benchmark
- TAF Requirements for Approval
 - Tolerance is +/- 10% Within 5 Years and +/- 15% Within 10 Years

Year	Secure	Non Secure	Total	TAF	Difference	Adjusted TAF	Difference
2020	9,271	16,919	26,190	18,917	38.45%	26,190	0.00%
2025	10,037	15,293	25,330	19,536	29.66%	27,066	-6.41%
2030	10,866	13,824	24,690	20,189	22.29%	27,971	-11.73%
2040	12,735	11,295	24,030	21,588	11.31%	29,873	-19.56%

Forecast Summary

- Island Markets Not Likely to Recover Without Seismic Cost Shift (i.e. Electric or Autonomous Aircraft)
- Significant Cape-Based Passenger Market Currently Using Other Airports Highlights Potential for More Service
- Baseline Includes Some Incremental JetBlue Growth While Keeping it Seasonal
- Enplanement Growth Based on Attracting New/Different Types of Commercial Service than what HYA has Traditionally Served in the Past



Baseline Forecast and TAF

	Actual	Forecast		
	Baseline	2025	2030	2040
FAA TAF				
Enplanements	18,679	19,536	20,189	21,588
Enplanements (Adjusted TAF)	26,190 ²	27,066	27,971	29,873
Total Operations	72,442	75,818	78,399	83,873
Based Aircraft¹	38	47	52	62
Master Plan Forecast				
Enplanements	29,457	25,330	24,690	24,030
Total Operations	67,350	67,219	68,804	73,001
Based Aircraft	47	46	45	43
Pct. Difference From TAF				
Enplanements	57.7%	29.7%	22.3%	11.3%
Enplanements (Adjusted TAF)	12.5%	-6.4%	-11.7%	-19.6%
Total Operations	-7.0%	-11.3%	-12.2%	-13.0%
Based Aircraft	23.7%	-2.1%	-13.5%	-30.6%

¹ TAF does not include 10 Cape Air aircraft

² Baseline Enplanements for Adjusted TAF used 2020 as the Baseline Year

Critical Aircraft

Airport RDC Will Remain C-III

Existing: E190



Future: A220-300



An aerial photograph of an airport, showing runways, taxiways, and surrounding land. A large, semi-transparent blue rectangle with a white border is overlaid on the right side of the image, containing the text 'Next Steps'. The text is in a large, white, italicized serif font. The background shows a mix of paved airport surfaces, green grass, and some buildings in the distance.

Next Steps

What's Next?



Review and Approval of the Forecast (FAA)



Submit Interim Report #1 for PAG Review
(Project Website Forthcoming!)



Capacity Analysis and Facility Requirements



Development Alternatives



Implementation Plan



Next PAG Meeting – June 2020: *HYA Capacity Analysis and Facility Needs*

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Questions

