

Aviation Capital Investment Plan

City Council Policy Session
October 25, 2016

 **PHX DVT BYR**





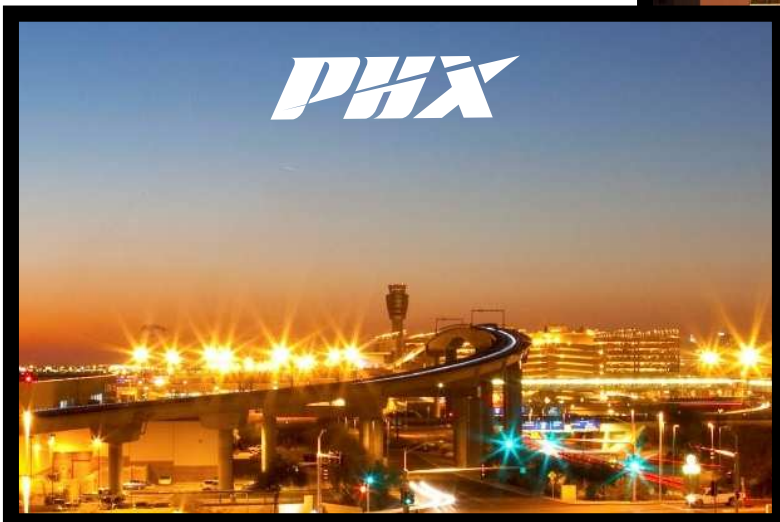
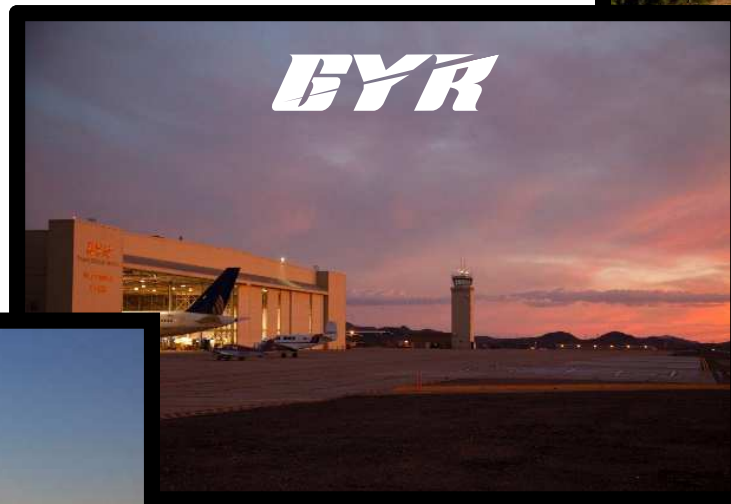
Aviation Department Overview



55,000 employees

\$29 billion impact

Financially self-sustaining

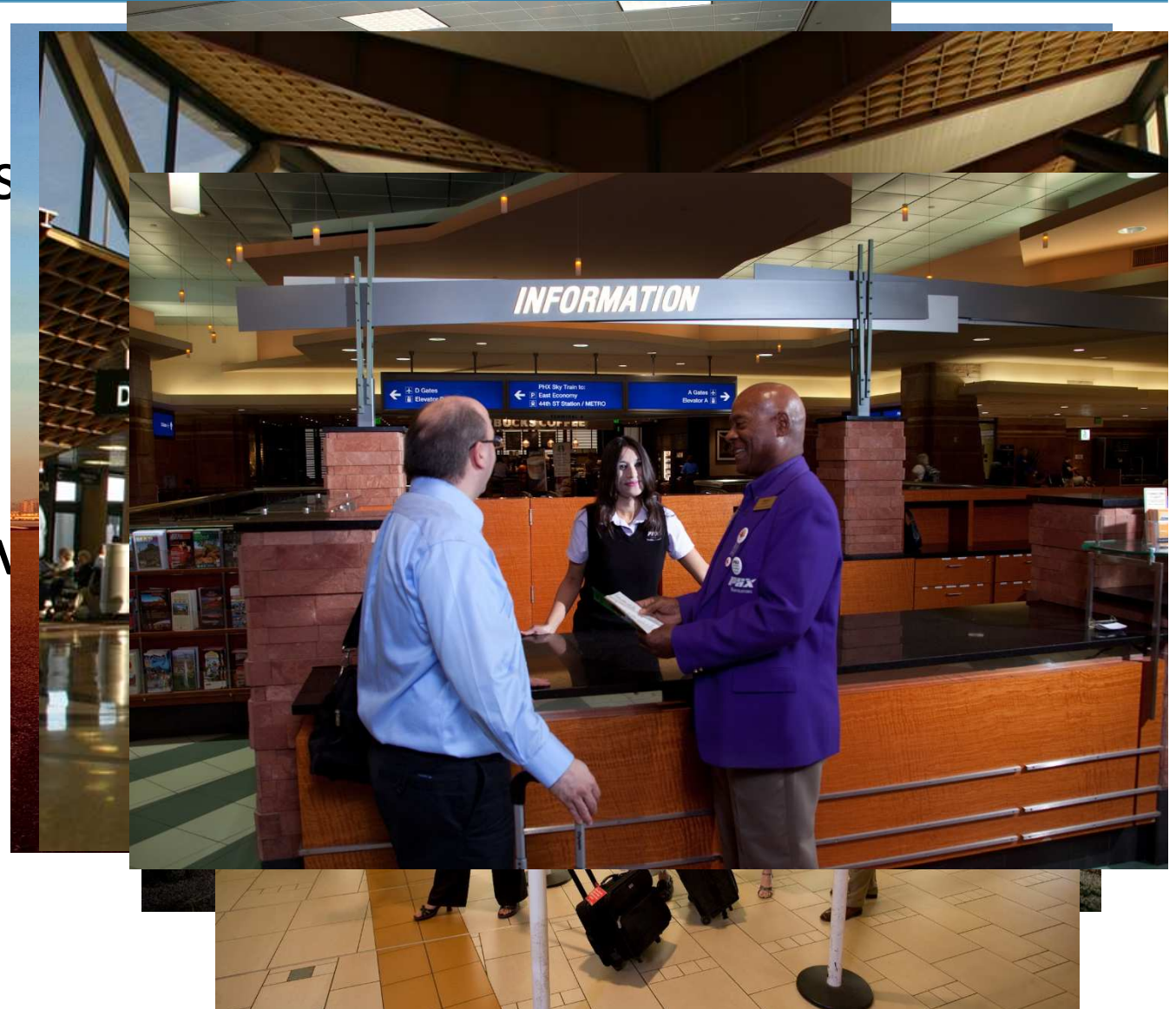




What Makes a Successful Airport ?



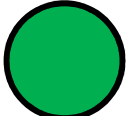
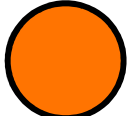
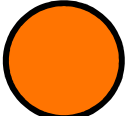
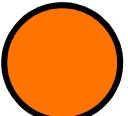
- Airfield
- Airport Access
- Customer Processing
- Gates
- Customer Service





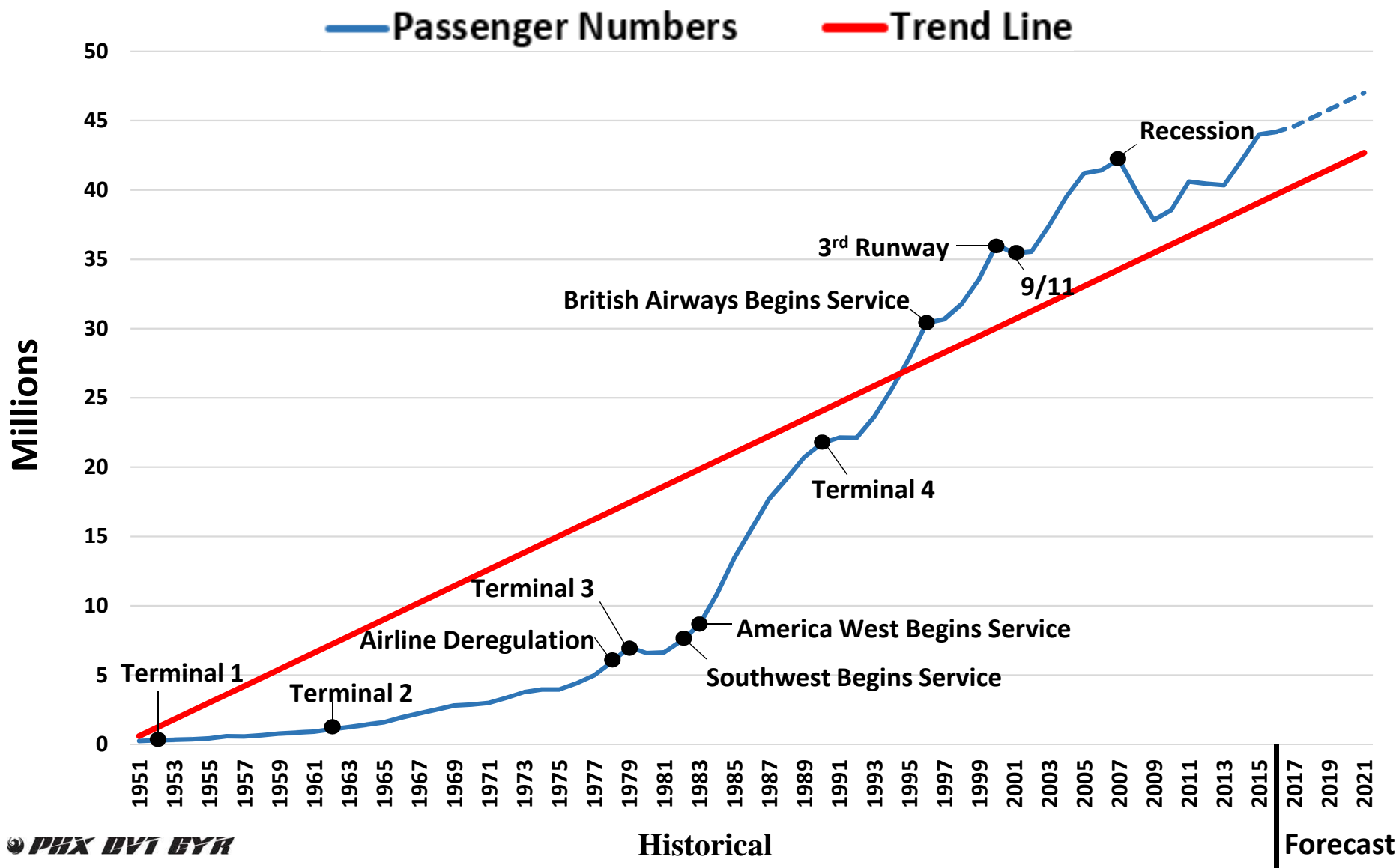
Comparative Capacities at Sky Harbor



| | Airfield | Gates | Terminals | Roadways/ Curbs |
|-------------------------------|---|---|---|---|
| 2016 Current Status |  |  |  |  |

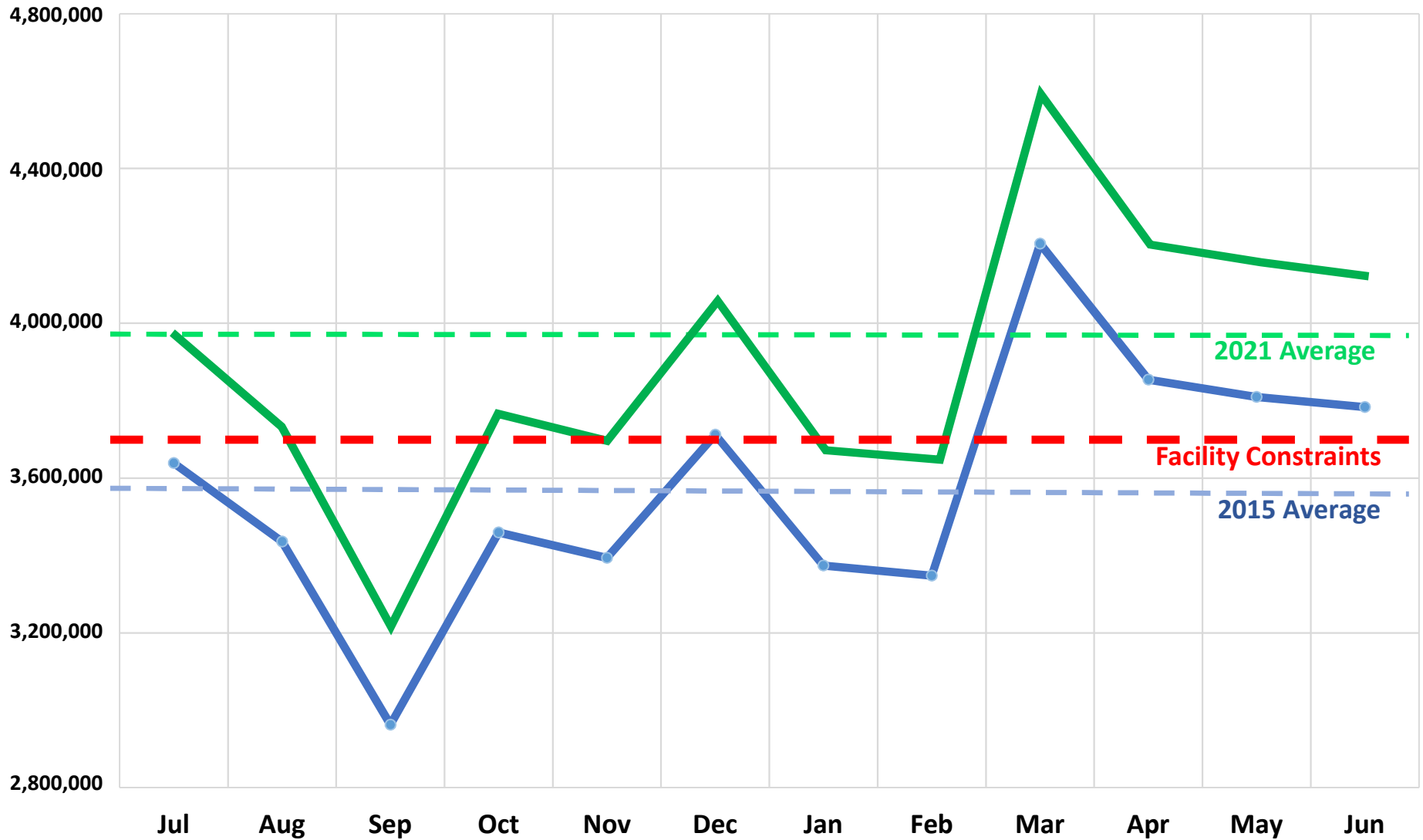


Passenger Trend Forecast





Everyday is a Peak Day in 2021





Rental Car Center Shuttle Line



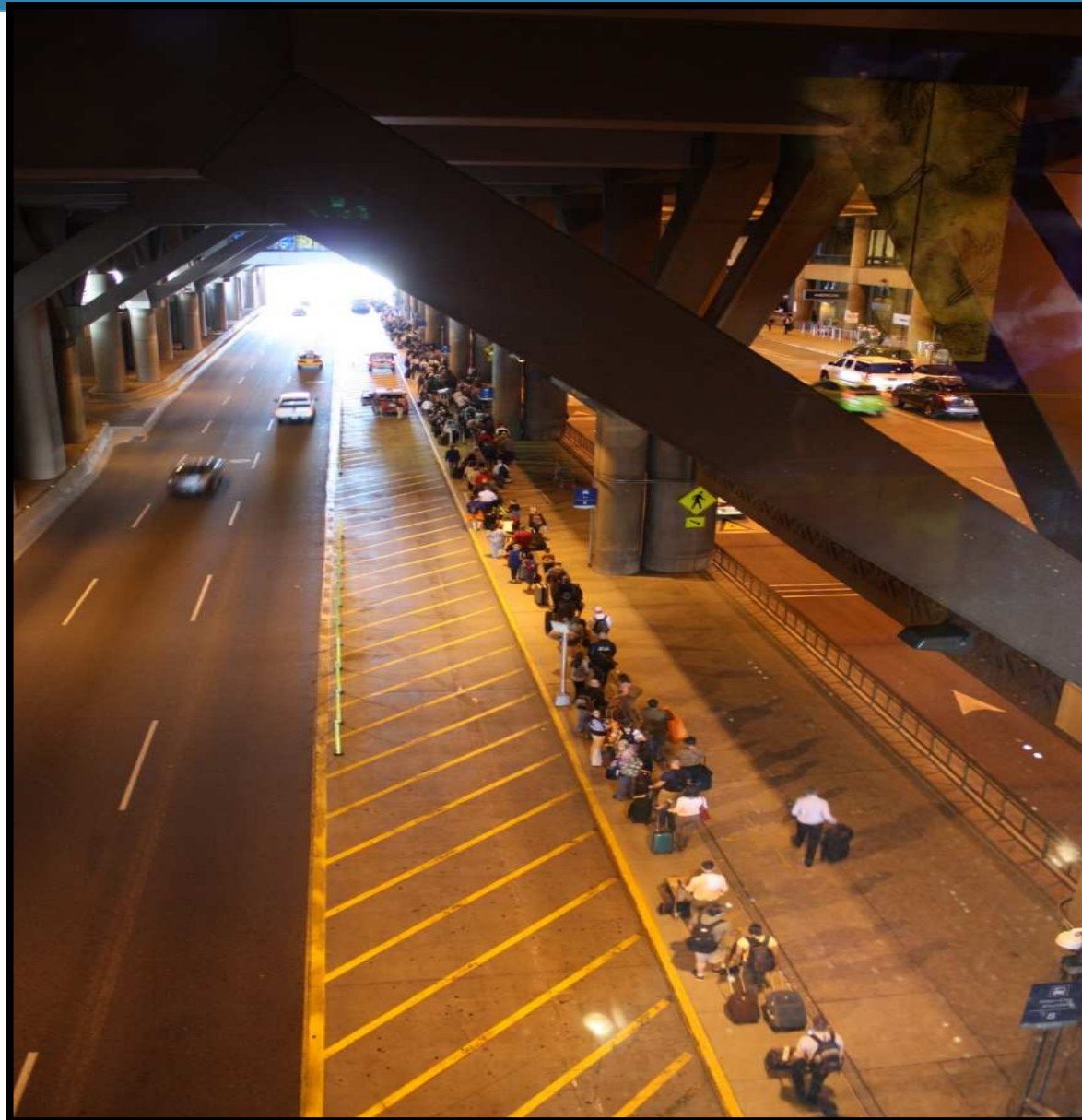


Rental Car Center Shuttle Line



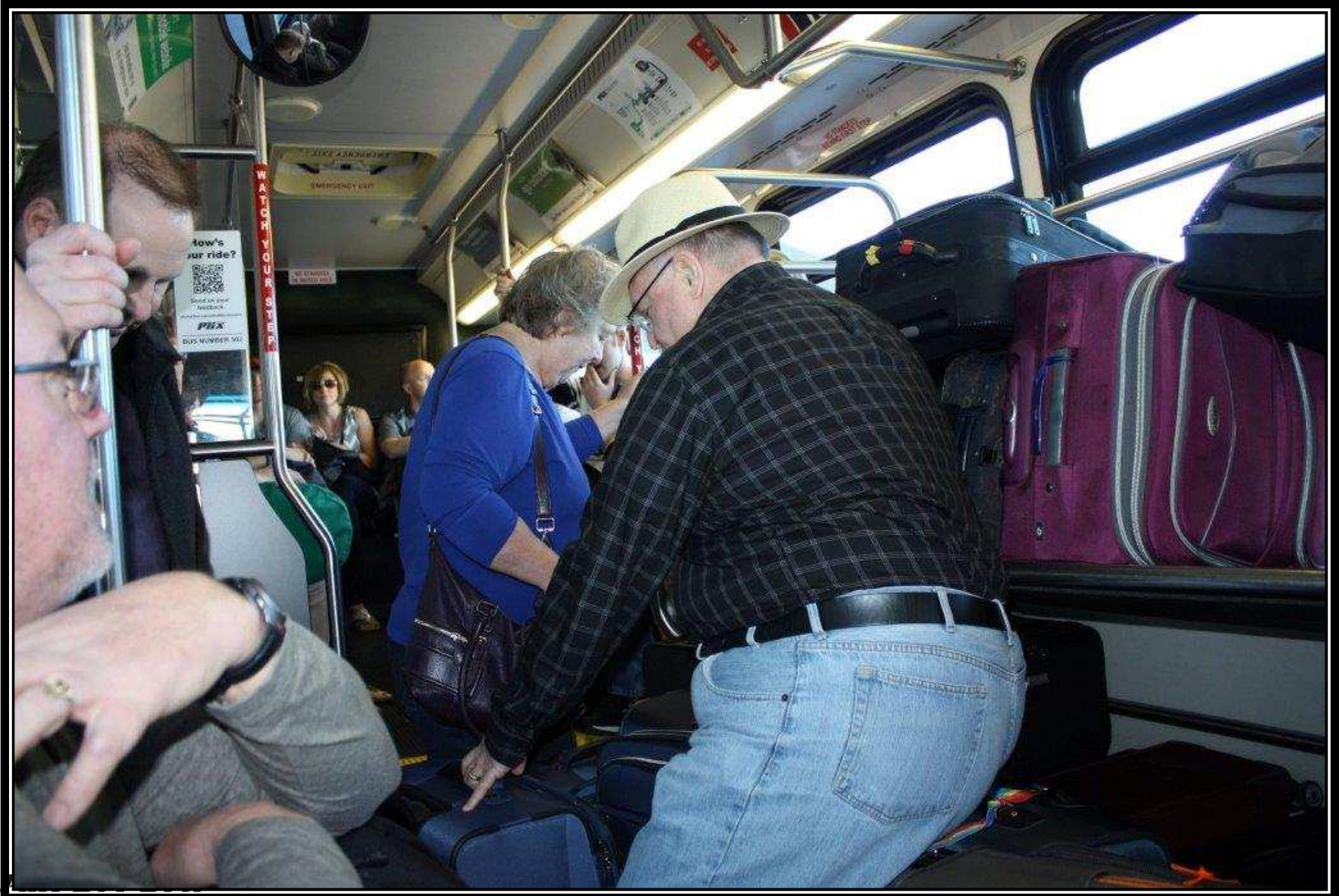


Rental Car Center Shuttle Line



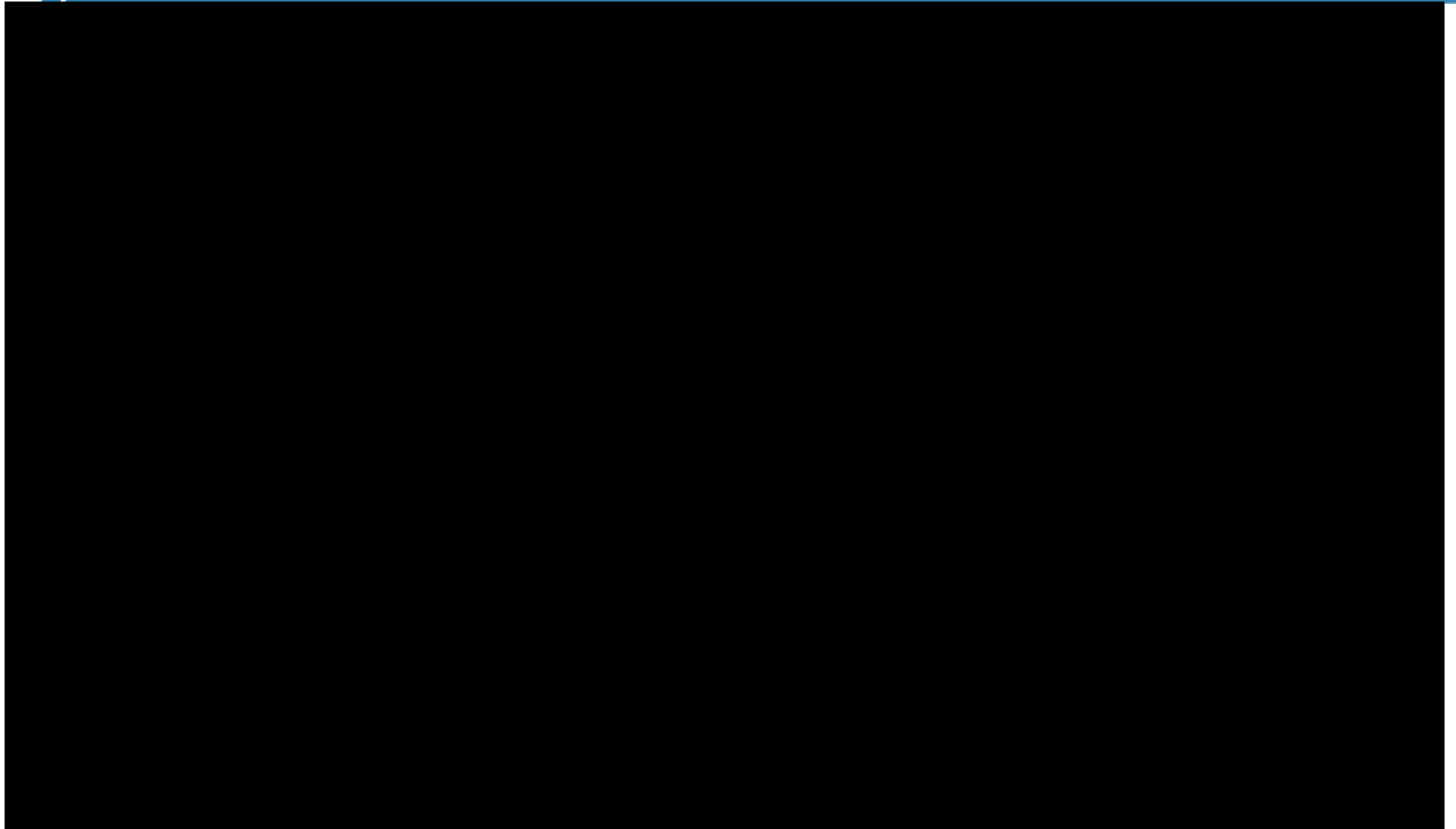


Rental Car Center Shuttle Bus



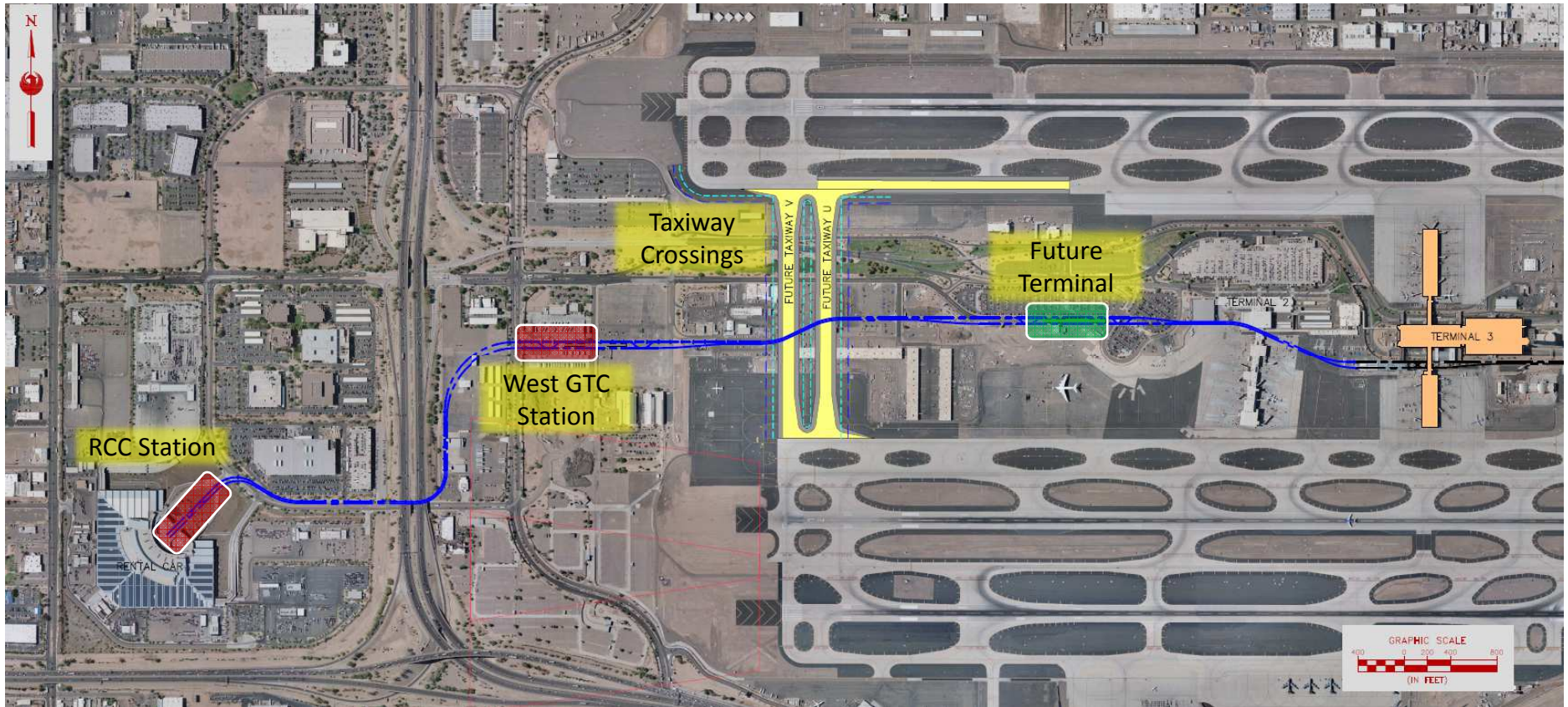


Rental Car Center Traffic Congestion



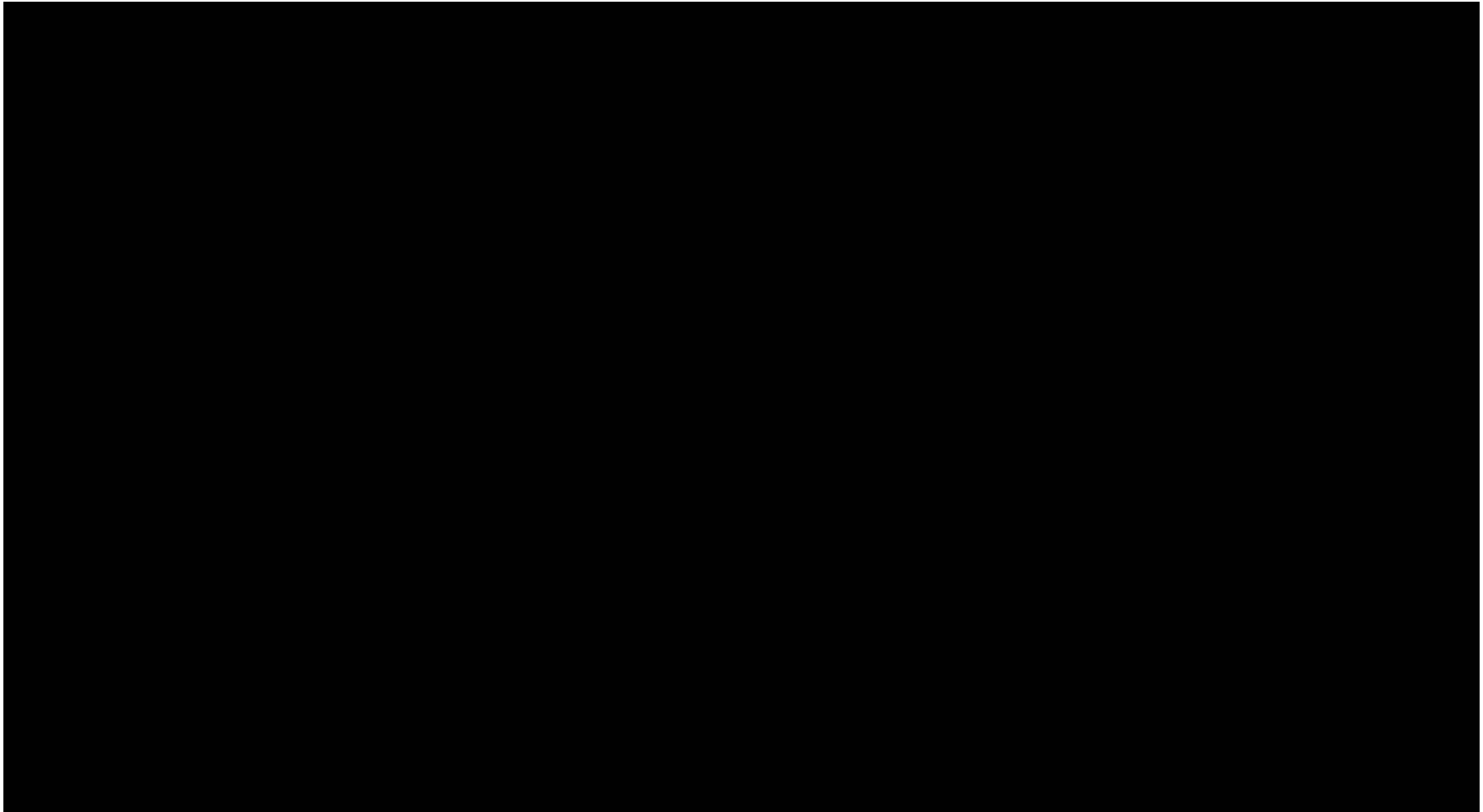


PHX Sky Train Stage II





Terminal 4 Constraints Video





Terminal 4 Concourse Constraints





Terminal 4 Ticket Counter Constraints





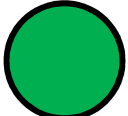
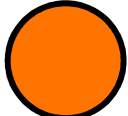
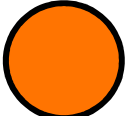
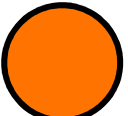
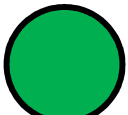
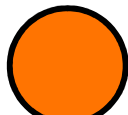

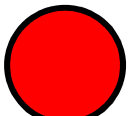
Terminal 4 S-1 Concourse

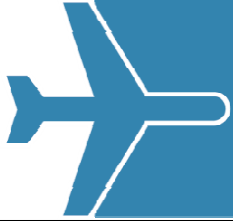




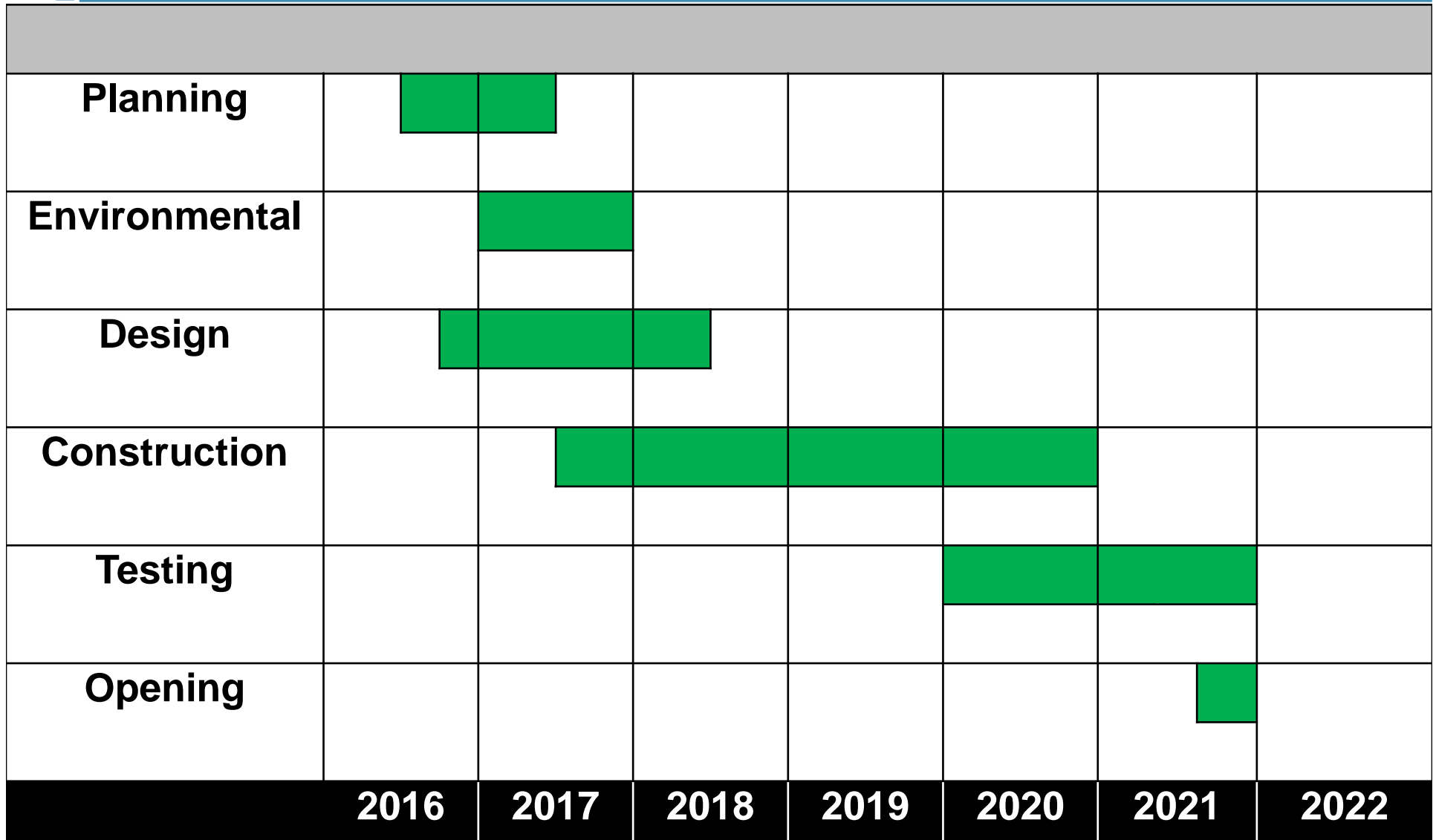
Comparative Capacities at Sky Harbor



| | Airfield | Gates | Terminals | Roadways/ Curbs |
|--|---|---|---|---|
| 2016 Current Status |  |  |  |  |
| 2021 T3 Modernization only; No further development |  |  |  |  |



PHX Sky Train Stage II Proposed Schedule

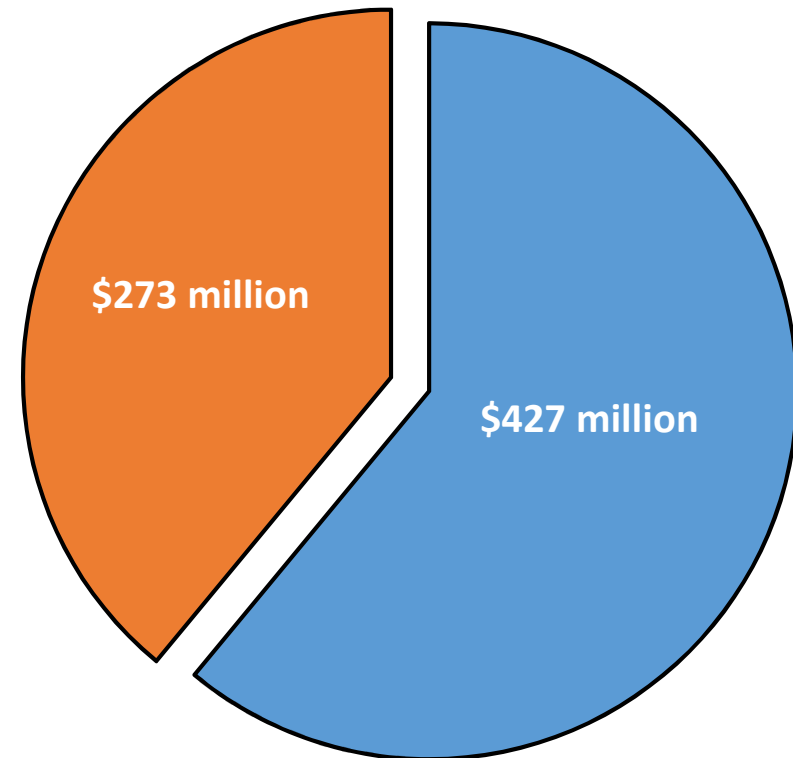




PHX Sky Train Stage II Costs and Funding



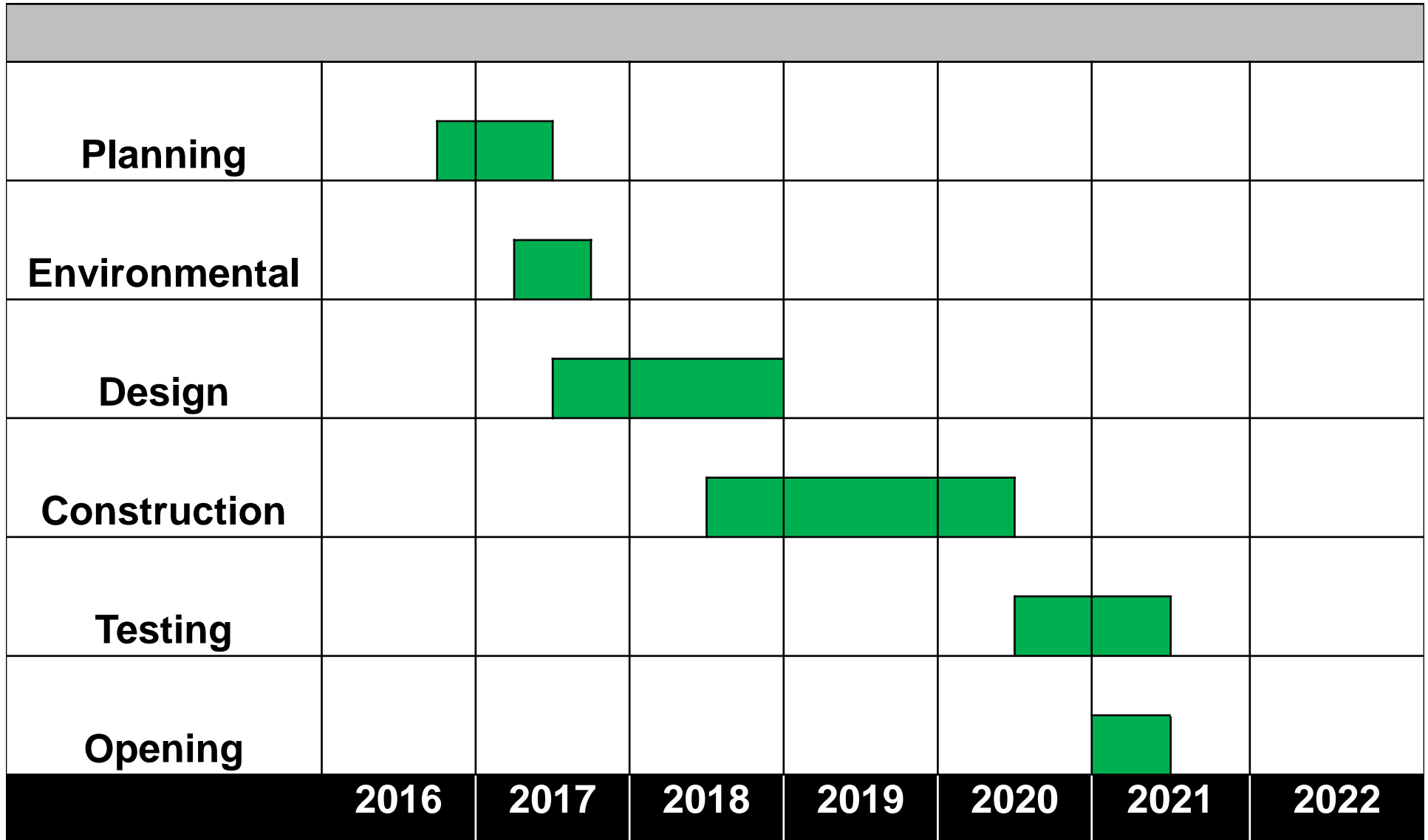
- The project is estimated at \$700m with expected completion in FY 2020
- The Aviation Department intends to fund the project using 100% Airport funds (PFC's and CFC's)



- Passenger Facility Charges
- Customer Facility Charges



Terminal 4 S-1 Concourse Proposed Schedule

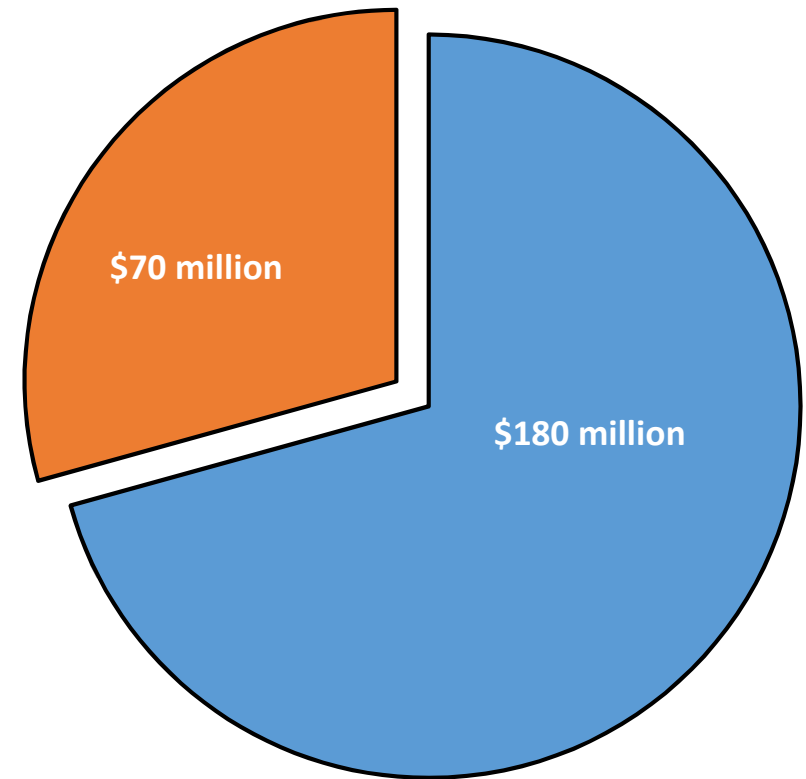




Terminal 4 S-1 Costs and Funding



- The project is estimated at \$250m and expected completion is in FY 2020
- The Aviation Department intends to fund the project using 100% Airport funds (bonds and AIF)



- Airport Bonds
- Pay-as-you-go

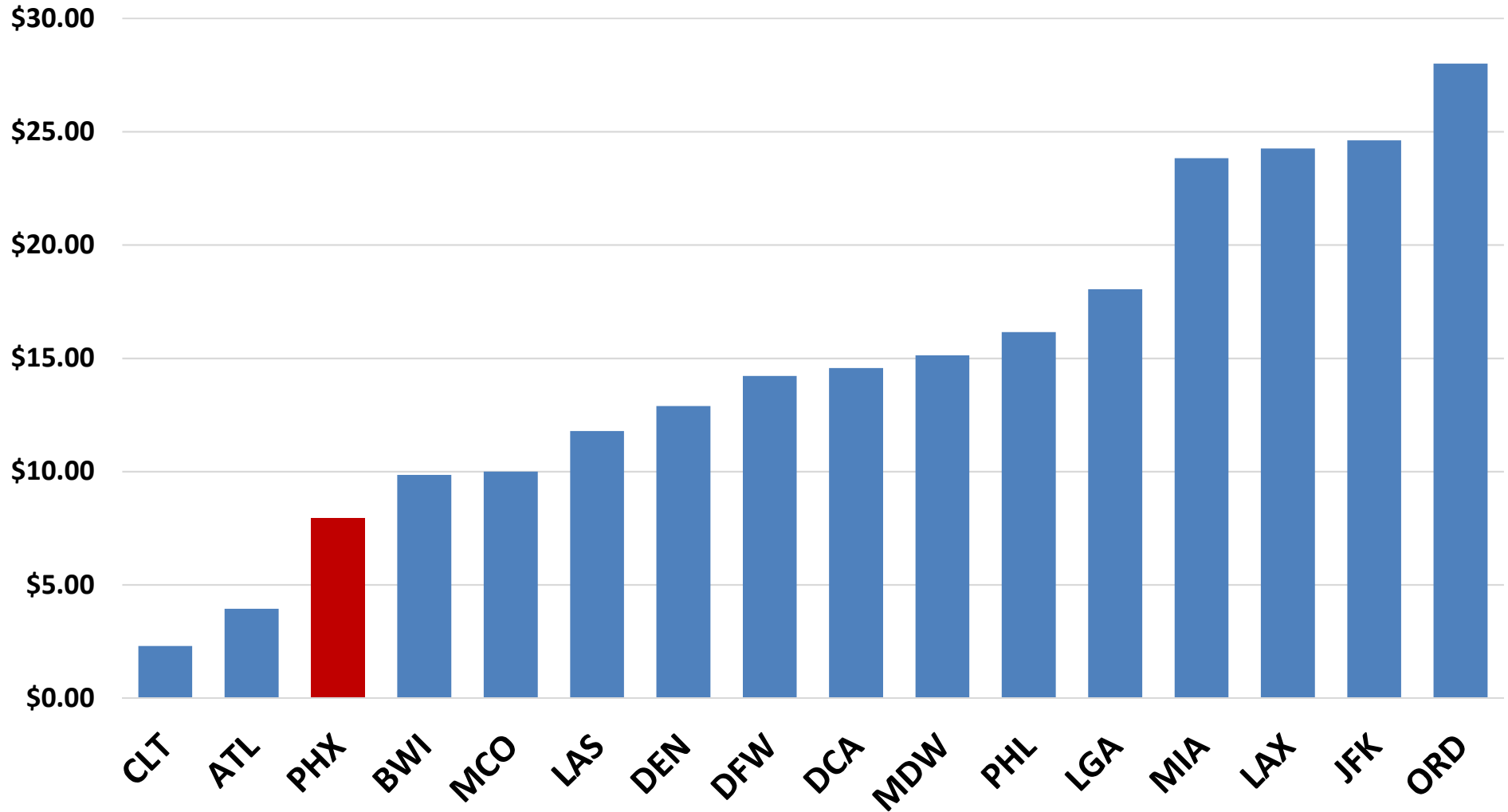


Cost Per Enplanement (CPE) Comparison

American and Southwest Hub Airports



Second lowest cost for American and Southwest Airlines



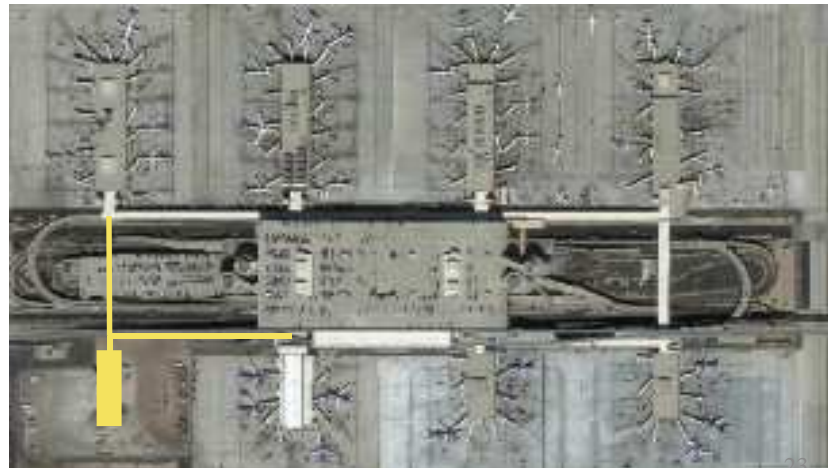


Recap: 5-Year Capital Investment



FY 2016-21 Capital Investment Spending (in thousands)

| | |
|--|-------------------|
| Terminal 3 Modernization | \$ 510,363 |
| Terminal 4 Intl. Facility Improvements | \$ 23,439 |
| Other Terminal and Airfield Improvements | \$ 402,444 |
| PHX Sky Train Stage II | \$ 700,000 |
| Terminal 4 S-1 Concourse | \$ 250,000 |



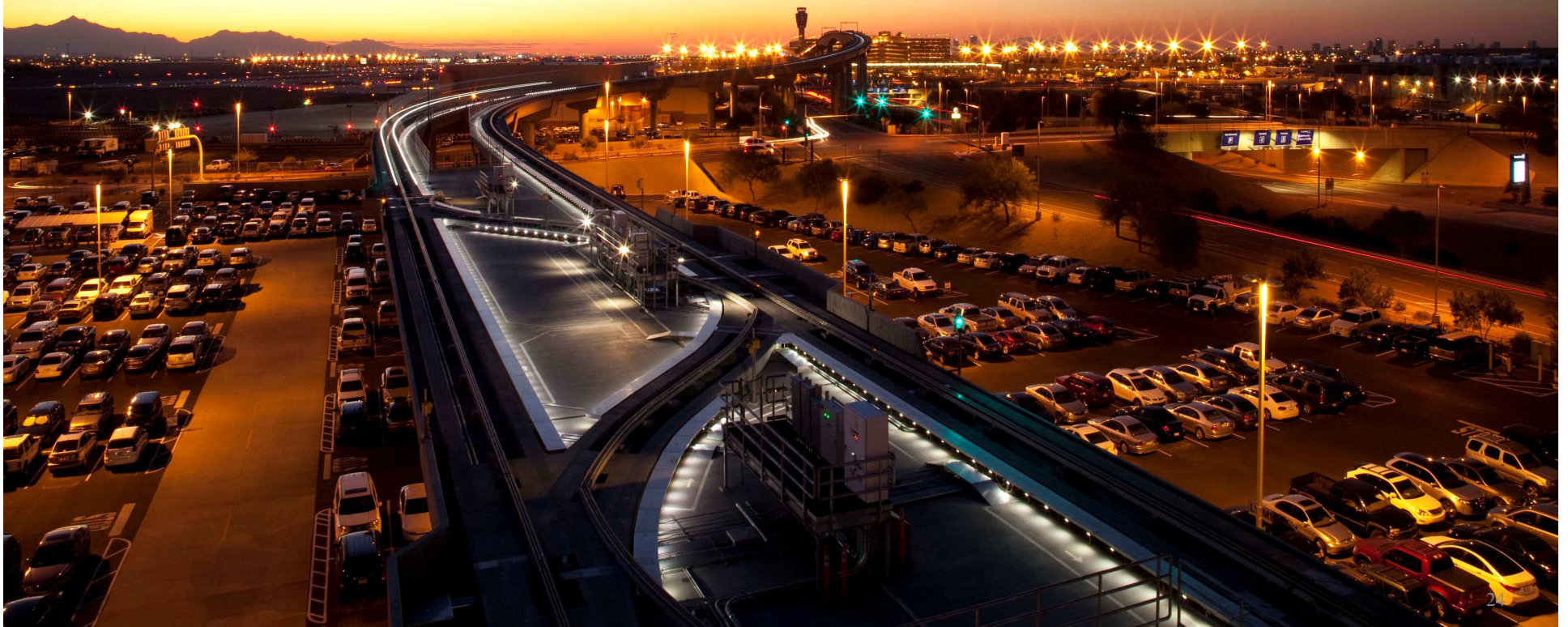
Sky Harbor: Front Door to Phoenix Arizona

Crucial for Customer Experience

Economic Impact

Financially Feasible

Solely Funded with Airport Funds



Aviation seeks City Council approval for PHX Sky Train Stage II and Terminal 4 S-1

 **PHX DVT BYR**

