



Airport land use and development study yields preliminary forecasts and data

Project is on schedule with research nearly complete; aviation demand and land needed for aviation vs. non-aviation land use determined

INDIANAPOLIS—The comprehensive study commissioned by the Indianapolis Airport Authority (IAA) to guide future land use and development of its airport system is on schedule, with the first two phases of the project nearly complete.

The components include review and consolidation of existing documentation, data collection and review, comparative airport analyses, market research, and community outreach as part of the overall project. The timeline is:

| | | <i>Status</i> |
|---------------|---|---------------|
| ✓ June 2010 | Document consolidation and research complete | Complete |
| ✓ July 2010 | Aviation vs. non-aviation land uses recommended | Complete |
| August 2010 | 30 percent project completion | In progress |
| October 2010 | 60 percent project completion | |
| November 2010 | 90 percent project completion | |
| December 2010 | Final presentation of completed study | |

Highlights from some of the preliminary research are included below. Forecast horizon is for 30 years with projections of demand set for 2020, 2030, and 2040.

Aviation demand & forecast

- Each of the five general aviation airports (also known as “reliever airports” because they are designed to reduce congestion at Indianapolis International Airport) will experience growth in based aircraft and operations. In 2009, there are 420 based aircraft at all relievers; that will grow to 648 by 2040. The largest change in based aircraft will be an increase of seven (7) percent in jets, moving from four (4) percent today to 11 percent in 2040.
- Corporate jet aviation is expected to be one of the fastest-growing segments, with Mt. Comfort and Hendricks County expected to experience largest growth and ability to expand infrastructure needed to meet demands of general aviation community.
- Projected growth in passenger traffic at Indianapolis International Airport is in line with projections by independent organizations including FAA, Boeing, and Airbus as well as stakeholders including FedEx and passenger airlines.
 - > Mix of aircraft activity at IND (passenger, cargo, and general aviation) is not expected to change.

- > Over next 30 years, air cargo volumes at IND are projected to double to 1.7 million metric tons. The growth rate will range from 2.1 to 3.9 percent annually.
- > By 2040, data indicate 297,700 annual operations, or an annual growth rate of 1.8 percent, is likely in comparison to the 170,000 projected for 2010.
- > Enplaned passengers will grow from 3.8M in 2009 to 7.2M in 2040, an average annual growth rate of 2.1 percent.

Land needed for aviation vs. non-aviation use

- **Eagle Creek Airpark (KEYE):** Long-term plans do not call for significant changes to the airfield and the runway will remain unchanged at 4,200 feet. Expansion will be comprised of additional hangars and replacement of existing hangars approaching end of useful life. Minor expansion of FBO and businesses located on the airfield is expected. Space for non-aviation uses is limited to 15-acre parcel along southern edge of airport on West 38th St. at intersection with Airport Dr.
- **Hendricks County Airport (K2R2):** Significant growth in piston and turbine aircraft is expected and will require airport growth in form of runway extension, additional T-hangars, corporate (private) hangars, and FBO facilities. Expansion will occur directly to the south of existing hangar and support facilities. Land for non-aviation uses is available along South CR 300 East and on west side of existing runway accessible by South CR 225 East.
- **Metropolitan Airport (KUMP):** No changes to existing single runway airfield are expected in next 30 years and plans for a second runway have been abandoned. T-hangars and private hangars will expand. Land previously purchased for development of second runway is no longer needed for future aviation development. Frontage along East 96th Street is available for non-aviation development.
- **Downtown Heliport (K8A4):** No major changes expected other than routine maintenance and/or upgrades to hangar space and office facilities, including office space for non-aviation tenants.
- **Mount Comfort Airport (KMQJ):** Land is being preserved for planned third runway to parallel the primary runway on southern portion of property. Property along Mt. Comfort Road, West 500 North, and property east of crosswind runway is available for non-aviation development.
- **Former Speedway Airport:** All 126 acres are available for non-aviation development. Property has good visibility for commercial uses and is bisected by Ronald Regan Parkway.
- **Indianapolis International Airport (IND):** Future growth in passenger and cargo operations will require significant additional lands. Land south of I-70 is being protected for future third parallel runway. Growth in FedEx cargo operations will require significant lands for next 30 years. Lands available for non-aviation development are located along Washington Street corridor, High School Road corridor near former airport terminal, and those adjacent to conservation areas located between I-74 and South Kentucky Avenue.

Key themes from focus May focus groups

Focus groups were conducted May 18, 19, and 20 and were comprised of representatives from specific sectors: real estate brokers and developers, business and economic development groups, higher education institutions, land planning and infrastructure groups, as well as airport neighbors.

The key themes, ideas, and suggestions emerging from these focus groups include:

- Explore airport synergies with cargo and freight carriers, including railroad operators
- Establish more direct flights, including international flights, to compete with ORD
- Create public transportation options between airport and downtown, such as light rail and park-and-ride facility at Metropolitan Airport for connectivity downtown
- Create business/education/cultural centers at IND
- Support convention and visitor business by providing higher-quality shopping, dining, and entertainment on west side of Indianapolis
- Facilitate campus extensions and training facilities at IND for higher education institutions
- Cultivate corporate businesses that support aerospace and defense industries
- Stop spread of urban blight through re-utilization of underused assets on High School Road

Airport development in other U.S. communities

Like other prudent airport operators, IAA is not the only airport authority that reserve lands for future aviation needs while seeking highest and best use for other authority-owned properties.

- **PITTSBURGH (PIT):** This community is no longer an airline hub and has experienced sharp decreases in passenger traffic. Land for future third runway is being held in reserve. Lands for non-aviation uses are being leased, for example, by Dick's Sporting Goods world headquarters and solar panel manufacturing facility. One full-time staffer markets, leases, and manages non-aviation properties. PIT has one reliever airport.
- **KANSAS CITY (KCI):** Hundreds of acres of land have been identified for non-aviation and commercial development. Land is in reserve for future third runway. A race track is being considered as an interim use of lands purchased for future aviation needs. Includes a Class A office, multi-tenant, custom-leasing office complex called The Ambassador Building.
- **COLORADO SPRINGS (COS):** Colorado Springs International's Business Park currently has three major tenants, including Northrup Grumman. COS management envisions a business park tenants focusing on defense contractors and the U.S. Air Force. Lands were purchased with federal funds and the FAA has agreed to allow COS to develop for non-aeronautical purposes.
- **WASHINGTON (IAD):** Thirty years ago, Dulles had 2.5 million passengers and 10,000 acres of airport property with a major highway and rail right-of-way. Today, IAD handles over 20 million passengers annually and the airport authority is constructing an expansion of the Metro (public rail transportation) to extend service from city center to IAD.
- **MEMPHIS (MEM):** Led by Chamber of Commerce, this city has embraced the aerotropolis concept.

Both IAA and Landrum & Brown officials will continue monitoring progress in these and other communities as they move forward through 2010.

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