

EXECUTIVE SUMMARY

The Cities of Fort Collins and Loveland are located along the Front Range of the Rocky Mountains, east of Rocky Mountain National Park and the Arapaho & Roosevelt National Forests, approximately 50 miles north of Denver along Interstate 25. Jointly owned and operated by the Cities of Fort Collins and Loveland, Northern Colorado Regional Airport (FNL or Airport) is a vital asset to a major commercial center in the Fort Collins/Loveland area and a key component of the region's growing high-tech, innovation-focused economy.

The Northern Colorado Regional Airport Master Plan was prepared to guide the physical development of Airport property to accommodate existing and anticipated aviation activity. In addition, other factors relating to the Airport and its environs were evaluated, such as surrounding land use, environmental impacts, and financial planning.

As a general aviation and commercial service airport, FNL is a major economic catalyst in the northern Colorado region. In addition to the many aviation-related assets, the Airport also provides benefits to local businesses and industries, promotes tourism, and supports business development and expansion throughout northern Colorado. The 2020 Colorado Aviation Economic Impact Study by the Colorado Department of Transportation (CDOT) estimated the total impact in 2018 of Northern Colorado Regional Airport at 1,072 jobs with a total payroll of \$52 Million and a total annual economic output of \$161 Million.

The Airport's current Master Plan was completed in 2007. Since that time, there have been numerous changes in aviation at the local, regional, and national levels. For instance, Allegiant discontinued its commercial service at FNL in 2012. In 2017, FNL was selected as the test site for the Colorado Remote Tower Project. The COVID-19 pandemic, which began in 2020, caused a great amount of disruption and uncertainty throughout the aviation industry. The pandemic prompted the passage of the Coronavirus Aid, Relief, and Economic Security (CARES) Act, which included \$10 billion of economic relief for U.S. airports, including FNL, for the prevention of, preparation for, and response to the pandemic. This Master Plan serves as a reevaluation of the existing and projected aviation needs at FNL and provides the framework for the physical development at the Airport over the next 20 years. Most importantly, it identifies and reserves space for the continued improvement needs of the Airport in a manner that is financially feasible and appropriate in consideration of its surroundings. This is not a decision document, but rather a planning tool that indicates how the Airport's land might best be used to meet anticipated future demand and needs.



The long-term development plan for the Airport is described in the following sections and is graphically depicted in the Conceptual Development Plan (CDP) shown in **Figure E-1**.

Key Components of the Master Plan Study

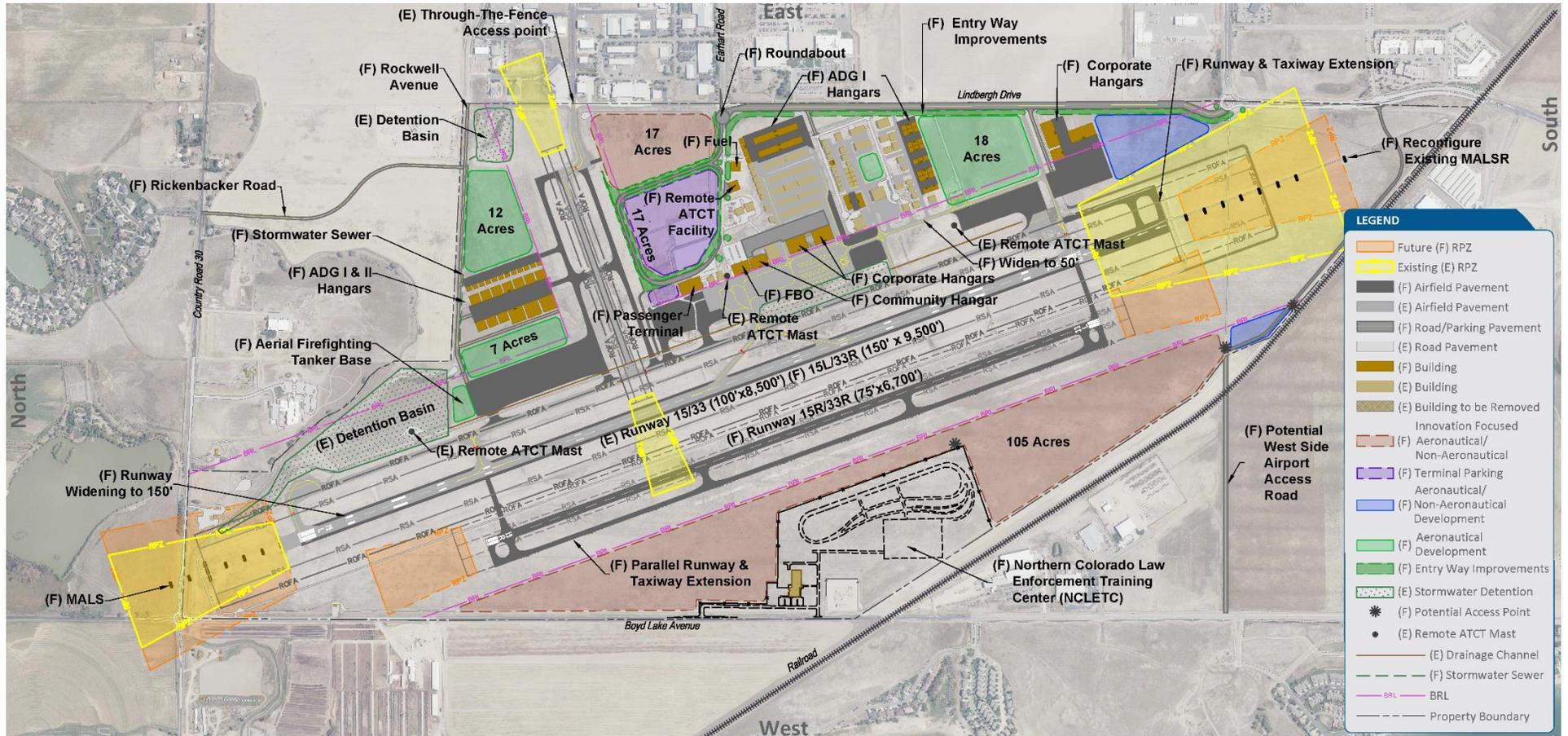
Key issues and considerations addressed in this Master Plan include:

- The incorporation of the strategic plan goals, objectives and initiatives outlined in the Airport’s 2018 Strategic Plan.
- The anticipated return of commercial service in relation to aviation forecasts and future facility needs, including widening and extending Runway 15/33, a new commercial passenger terminal building, and improved vehicle access and parking.
- The selection of FNL as the test facility for the Colorado Remote Tower Project.
- The integration of compatible land use planning and the development of an Airport Influence Area Plan.
- The preservation of space to accommodate a future parallel runway as well as additional aviation and non-aviation related facilities to support the strategic objectives of the Airport.
- The flexibility to adapt to evolving conditions and needs.



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Figure E-1: Conceptual Development Plan



North | Feet
0 500 1,000
(E) Existing
(F) Future



Study Findings

Airport Influence Area Study Summary

Gruen Gruen + Associates (GG+A), a real estate firm specializing in market analysis, compiled an economic evaluation of the FNL Airport Influence Area (AIA). This study effort was conducted to comprehensively analyze the existing economic and development conditions within the AIA and to provide a framework to be used by the Cities of Loveland and Fort Collins, and Larimer County in their future land use decision making processes. The recommendations of this study are intended to be used to develop a framework for future compatible land use and infrastructure planning on and around the Airport.

Since much of this effort was not eligible for federal grant funding under the FAA Airport Improvement Program (AIP), it was completed separately from the other chapters in this Master Plan Update. Key recommendations of the AIA Study include:

- Develop implementation plan to lay the groundwork for a successful research and technology park or innovation district within the AIA.
- Encourage a long-term competitive functioning land market in the AIA.
- Proactively plan for a thriving mixed-use environment compatible with Airport operations.
- Maintain vigilance in protecting Airport from encroachment/incompatible land uses.
- Encourage Larimer County and City of Fort Collins to establish requirements within the AIA that are similar to City of Loveland's overlay zoning ordinance (via zoning or similar measure).
- Adopt additional land use compatibility measures to avoid problems with commercial air service development in the future (Aviation Activity Notices, requirements for new/amended plats).
- Establish uniform procedures (across jurisdictions) for Airport Director/Commissioners to provide review of all development proposals, land use applications, and proposed zoning changes in the AIA.



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Aviation Activity Forecasts Summary

In order to provide a defined rationale for necessary improvements needed at FNL as demand increases, aviation activity forecasts were developed using approaches outlined in FAA Advisory Circular (AC) 150/5070-6B - Airport Master Plans. The aviation activity forecasts, which are detailed in **Chapter 3**, were developed for the 20-year planning period (2018-2038) and based on historic activity, industry trends, local socioeconomic data, and considered the changes that have occurred at FNL since the completion of previous planning studies. Four passenger enplanement forecast scenarios were developed and evaluated. Because of the remote tower Project at FNL, three of the scenarios assumed that commercial service would resume at FNL (presumably sometime in 2020 following the introduction of air traffic control as part of the remote tower project). The Medium grown scenario, which is based on a 3.25% Annual Compound Growth Rate (ACGR) and the return of commercial service to two destinations (Las Vegas and Phoenix-Mesa), was selected as the preferred forecast for several reasons. Given Allegiant's successful history in providing commercial service routes to Las Vegas and Phoenix-Mesa have been successful, and it is reasonable to believe they could be successful again once their requirement for air traffic control at the Airport has been met.

Over the next 20 years, the types of aircraft projected to operate at FNL are the same as those that presently operate at the Airport, including small single engine prop-aircraft, larger business jet aircraft, and narrow body commercial passenger service aircraft, such A320. Overall, total aircraft operations, passenger enplanements, and based aircraft at FNL are anticipated to increase over the course of the 20-year planning period, as shown in **Table E-1**. The number of annual aircraft operations (landings and takeoffs) at the Airport is forecast to increase from just approximately 94,900 in 2018 to just over 142,000 by the end of the 20-year planning period. As shown below, it's anticipated that passenger enplanements will grow significantly during the planning period. The number of based aircraft at the Airport is expected to increase from 256 in 2018 to 325 in 20 years.



Table E-1: Aviation Activity Forecasts Summary, 2018-2038

Aviation Activity	2018	2023	2028	2033	2038
OPERATIONS					
Commercial Service	50	590	692	812	954
General Aviation	94,650	108,504	118,452	129,313	141,170
Military	200	200	200	200	200
TOTAL OPERATIONS	94,900	109,294	119,344	130,325	142,324
PASSENGER ENPLANEMENTS	3,388	48,431	56,829	66,684	78,248
BASED AIRCRAFT	256	275	291	308	325

SOURCE: Mead & Hunt, 2018.

Development Program Summary

The Capital Improvement Program (CIP) presented in **Chapter 8** outlines the long-term development program for FNL and includes planning level cost estimates for each project. These airport improvement projects are addressed in three phases to best incorporate funding mechanisms over time:

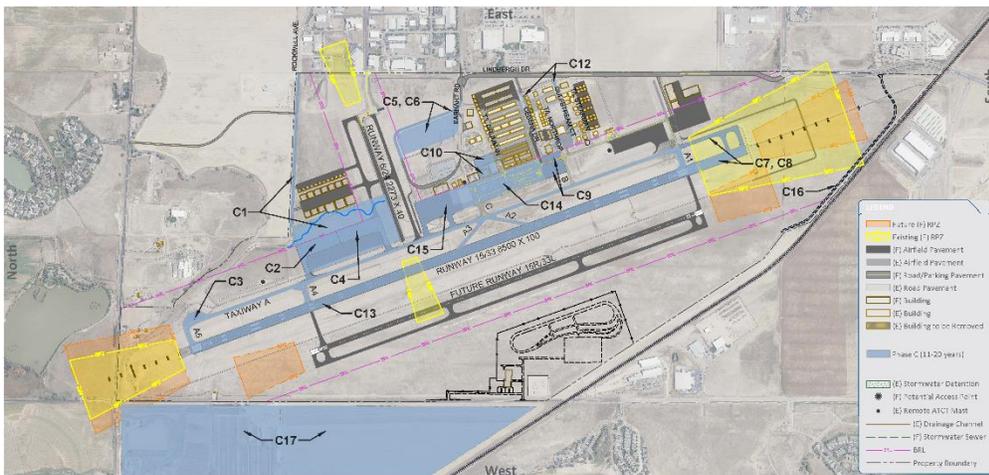
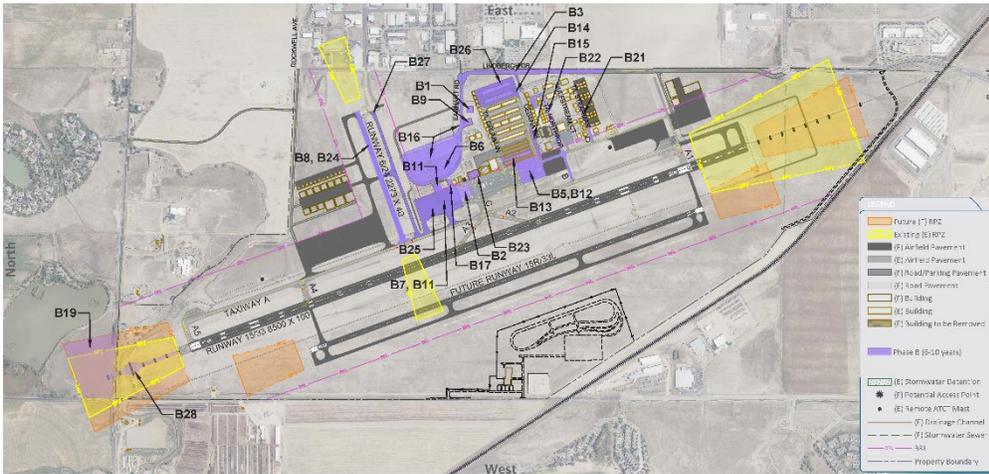
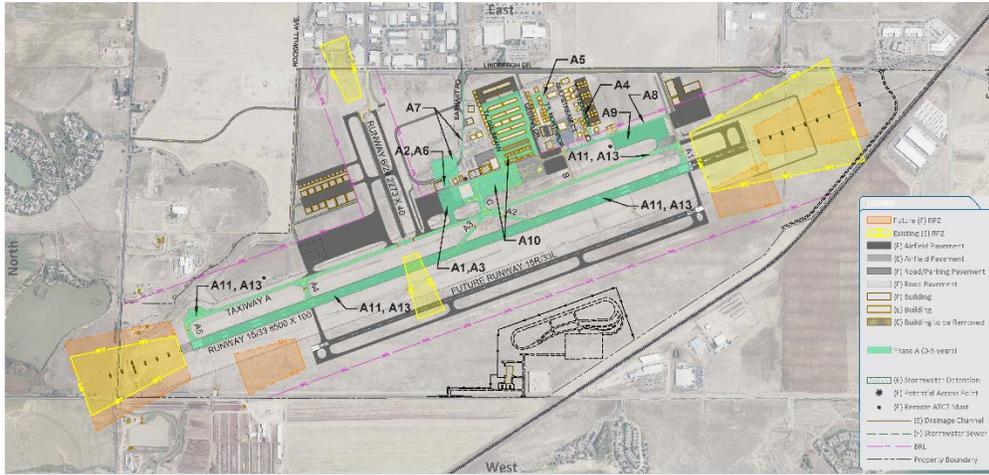
- Phase A – Short-Term (0-5 years)
- Phase B – Mid-Term (6-10 years)
- Phase C – Long-Term (11-20 years)

The CIP is a critical planning tool for the Federal Aviation Administration (FAA), the Colorado Department of Transportation (CDOT) Division of Aeronautics, and the local sponsors (the Cities of Fort Collins and Loveland). From the FAA’s perspective (keeping in mind that the FAA funded roughly 90% of the cost to prepare the Master Plan), the CIP is used by the agency when establishing priorities and budgeting expenditures at this Airport when compared with the needs of other airports. From the local sponsor’s perspective, the CIP identifies improvement needs and allows budgeting/financial decisions to be made with a comprehensive understanding of financial implications. The project included in Phases A, B and C are illustrated on the following three figures entitled Phasing Plans (see larger scale versions in **Chapter 8 - Development Program and Needs Assessment**).



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Figures E-3, E-4 and E-5: Phasing Plans A, B, and C



Financial Implementation Analysis

The primary objective of the Financial Implementation Analysis, which is presented in **Chapter 9** of the Master Plan, is to evaluate the Airport's capability to fund the Development Program and to finance airport operations. The analysis includes development of a detailed Financial Implementation Plan that presents the results of the implementation evaluation and provides practical guidelines for matching an appropriate amount and timing of financial sources with the planned use of funds.

The details of the Development Program (including a capital improvement project list, escalated project cost estimates, phasing recommendations, and a financial feasibility analysis) have been formulated into the Financial Implementation Analysis in consideration of comments received from Airport management, the Airport Commission, and the PDSC. The Financial Implementation Analysis assumes resumption of commercial passenger service at FNL and the achievement of the aviation operations and passenger enplanement forecasts. However, the achievement of any financial projection is dependent on future events, the occurrence of which is currently unknown.

Based on the assumptions underlying the Financial Implementation Analysis summarized in the Capital Cash Flow section of **Schedule 9-6**, implementation of projects in the Master Plan CIP that are scheduled during the Short-Term planning period are projected to be financially reasonable. Traditional airport capital funding sources are anticipated to be insufficient to finance a number of projects in the Mid-Term and Long-Term planning periods - such projects represent funding shortfalls for the capital program. However, a number of factors are unknown and may change by the time demand dictates the need to plan for and construct many of those projects. Furthermore, if funding cannot be identified for the indicated projects in the time frames needed, these projects will also need to be modified, delayed or cancelled until such time as a funding source is secured.

