



PDX COMMUNITY ADVISORY COMMITTEE

CHARTING A COURSE FOR PDX

Meeting June 21, 2023

Agenda

12:30-12:40 pm	<u>Welcome + Introductory Comments</u> <ul style="list-style-type: none">• Meeting Overview and Agenda Review• Meeting Notes Approval (Apr. 2022)• Chair Report	10 min	Ana Muñoz, Chair
12:40-12:50 pm	<u>Public Comment</u>	10 min	
12:50-1:05 pm	<u>Shared Prosperity Office Update</u>	15 min	Mayra Arreola, Port
1:05-1:25 pm	<u>PDX Updates</u> <ul style="list-style-type: none">• Business Report• Questions	20 min	Dan Pippenger, Port



Agenda

1:25-1:50 pm

Aviation Forecast

25 min

Aaron Ray, Port

- Forecast
- Discussion / Questions

1:50

Conclude Meeting for Public

1:50-3:00 pm

PDX Next Tour (for Committee)

Meet bus at curbside outside HQ Building

- Red Line
- New Main Terminal Roof

Sebastien Bonnart, Port
Danny Garcia, Port



CAC Group Agreements

PDX Community Advisory Committee members, staff and attendees will participate in good faith, which means:

1. Arrive on time and prepared to participate
2. Contribute with honesty, fairness and respect
3. Speak in a clear and concise manner
4. Listen to others without interrupting
5. Allow others to say what is true for them without fear of reprisal
6. Work toward fair and practical recommendations that reflect the diverse interests of the CAC and the public
7. Reach consensus and closure on issues (respect the process)





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CAC Chair Report



Ana Muñoz
Environmental Justice



PUBLIC COMMENT

ZOOM INSTRUCTIONS

1. **Add your full name** to the Q&A box if you want to comment
2. The facilitator will call your name when it is your turn to speak
3. When your name is called, there will be a brief pause as Zoom removes and reintroduces you to the meeting as a “Panelist”
4. When you return, please **unmute your audio** and **start video** before speaking
5. When your time is complete, you will be reassigned as an “Attendee”





PDX COMMUNITY ADVISORY COMMITTEE
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PDX Updates



Dan Pippenger
Chief Operating Officer



Shared Prosperity Office Update



Mayra Arreola
Chief Diversity & Social Impact Officer



Shared Prosperity Office (SPO)



Context





Strategic goals:

1. Deliver an exceptional experience to everyone who travels and works at PDX
2. Advance the movement of goods and services to market and deploy our assets for maximum impact
3. Build quality jobs, generational wealth and access to capital through equitable and inclusive economic development
4. Be an equitable and inclusive culture



What is Shared Prosperity?

- It is the Port's commitment to using our resources to address the racial and economic inequities in our region that concentrate wealth, increase economic disparity, and support a system that disproportionately benefits traditional interests and marginalizes Black, Indigenous, persons of color, low-income communities and persons with disabilities.
- The Port will evaluate every decision and opportunity through the lens of shared prosperity.
- We will use our employment, business and services to mitigate and/or eliminate those disparities, thereby improving the well-being of those communities.

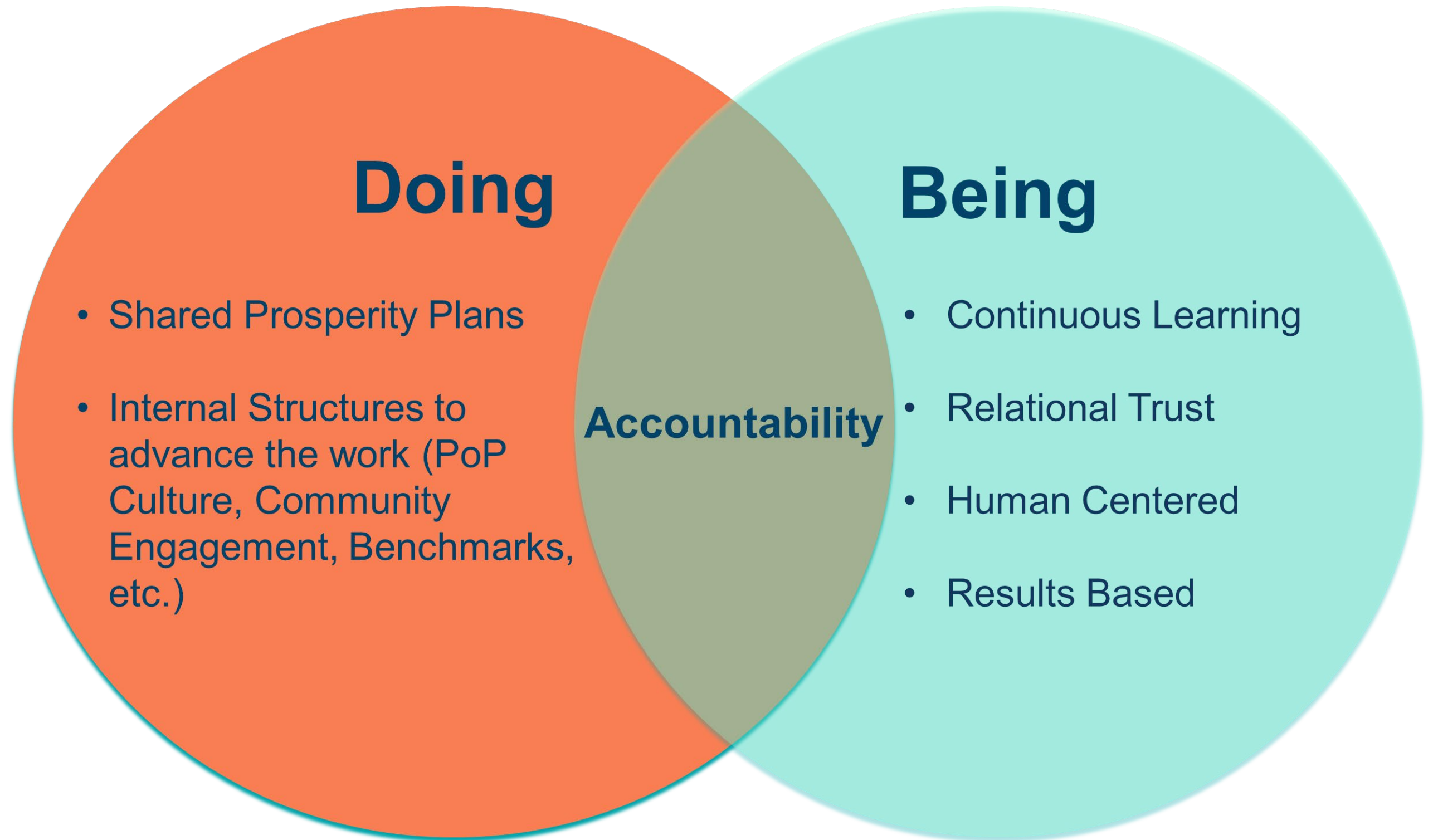


Equity and Shared Prosperity

- We've been advancing our diversity, Equity and inclusion (DEI) goals since 2018, when the commission approved our social equity plan.
- Our port wide DEI goals and our division equity plans have been the tools to advance shared prosperity
- These efforts lead to the creation of the Shared Prosperity office

Note: The plans will be revised in the upcoming year, to better align with our current strategic goals and shared prosperity priorities

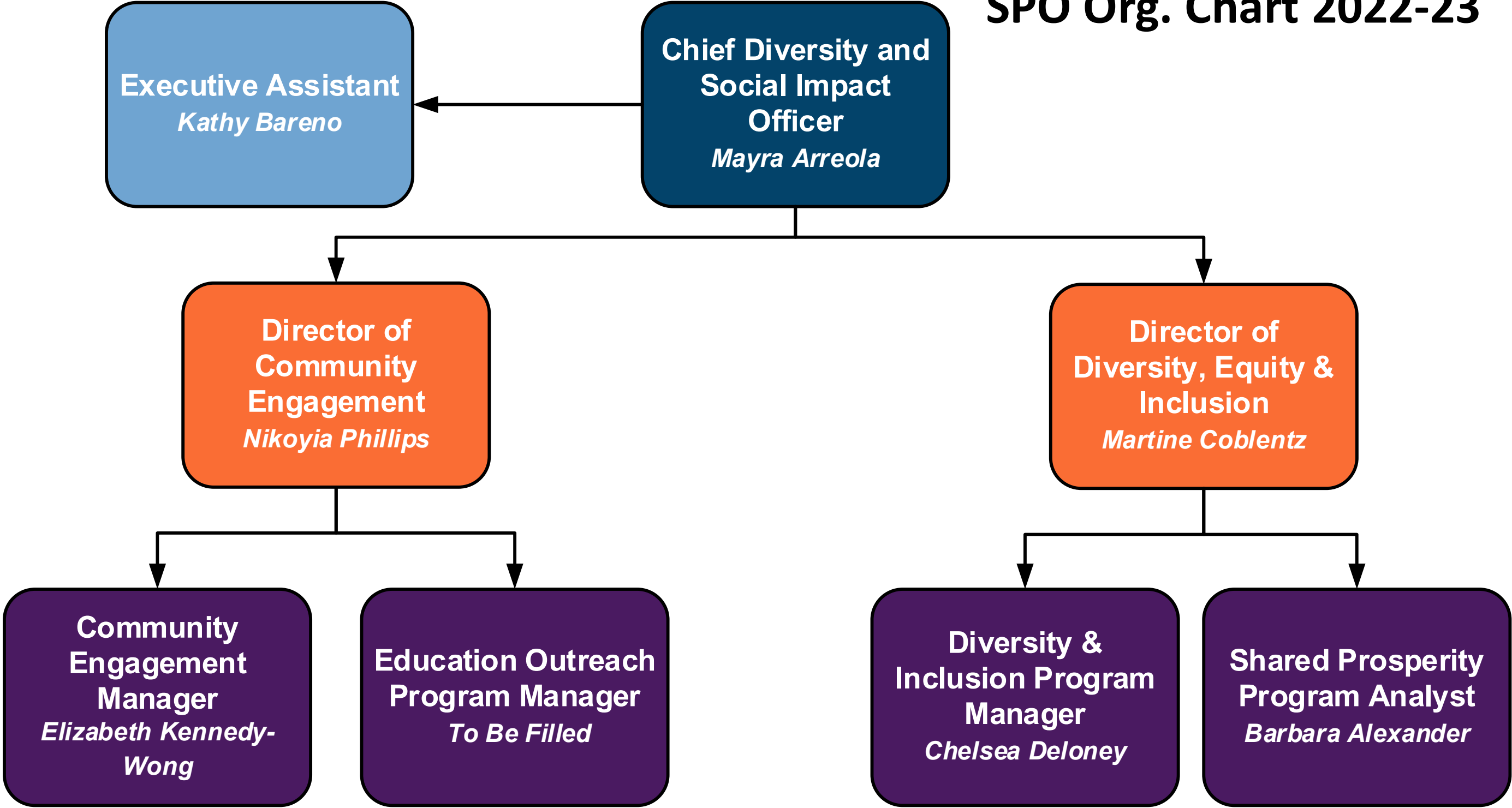
Accountability and Integration



Office Structure

The background features a large white arrow pointing to the right, centered on a light blue gradient. To the right of the arrow, there are several overlapping geometric shapes: a dark blue triangle at the top left, an orange square at the top right, a purple horizontal bar in the middle right, and a dark blue triangle at the bottom right.

SPO Org. Chart 2022-23

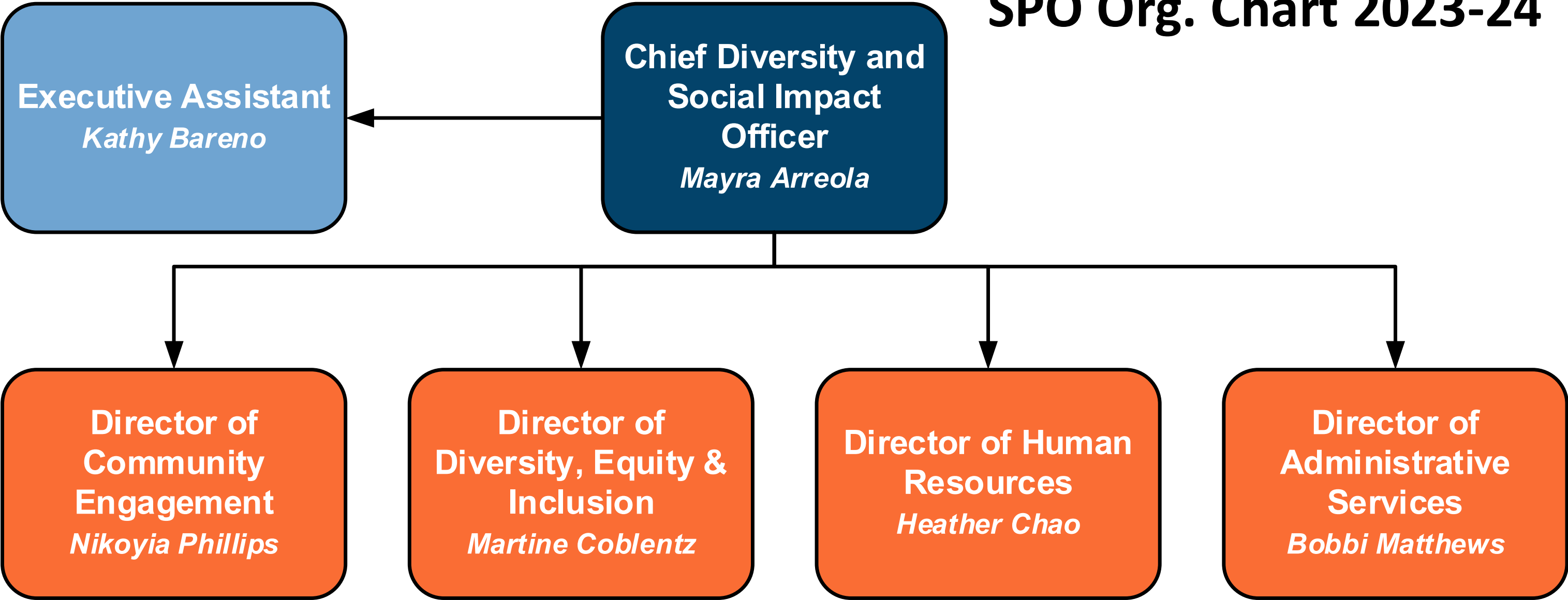


What Success Looks Like

- Shared Prosperity Plan(s) rooted in equity
 - Strategies and priorities aligned with Strategic plan
 - Projects applicable to day-to-day work
 - Clear DEI benchmarks to measure our progress
 - Internal structures to support the plan(s)
 - Applied learnings
- Standardized frameworks
 - DEI tools
 - Community Engagement
 - Learning, coaching and trainings informed by staff
- Accountability and support measures
 - Clear roles, responsibilities and expectations



SPO Org. Chart 2023-24



Thank you

Aviation Forecast

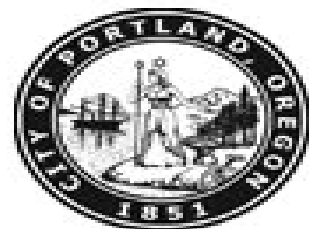


Aaron Ray
Senior Manager, Aviation Long-Range Planning



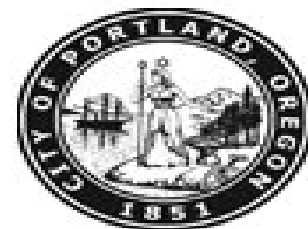
Aviation Demand Forecasts

- Industry Outlook
- Probabilistic Forecast
 - Forecast vs. Actual
- Key issues and trends
- Key Questions:
 - Are forecasts still appropriate planning inputs for ongoing planning & development?
 - When will we reach 21 Million Annual Passengers?
 - Will the Master Plan take a fresh look at demand?

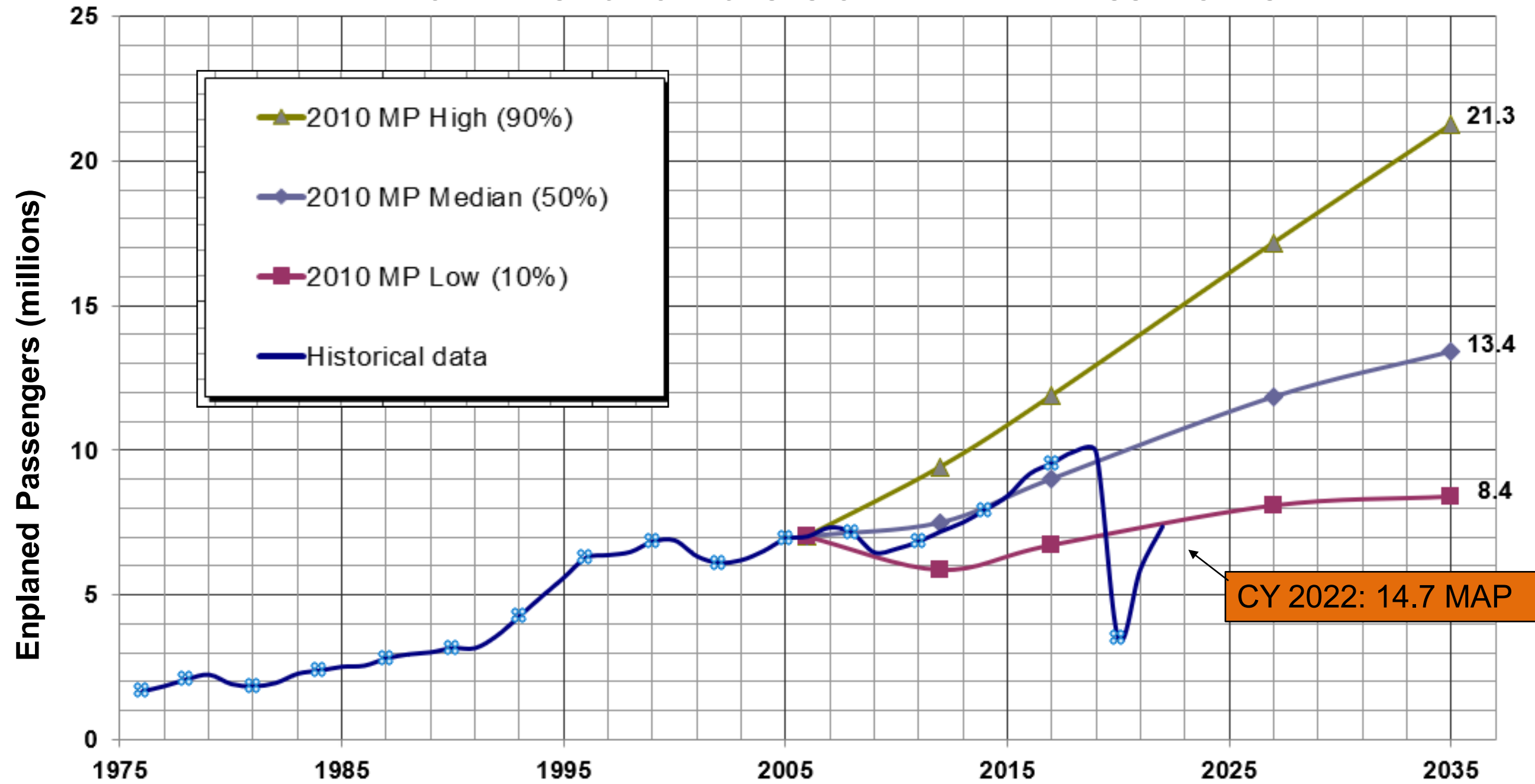


Industry Outlook

- Remember Scenario Planning in June 2020?
 - What does recovery look like?
 - What's the timeline?
- Industry does not expect passengers to return to pre-Covid levels until 2023-2024
- The FAA expects PDX passengers to exceed 2019 pre-Covid levels in 2024
- Domestic travel continues to outperform international
 - Leisure travel remains strong
 - Business travel slow to recover
 - International shows strong demand for European markets with a mixed outlook for Asia



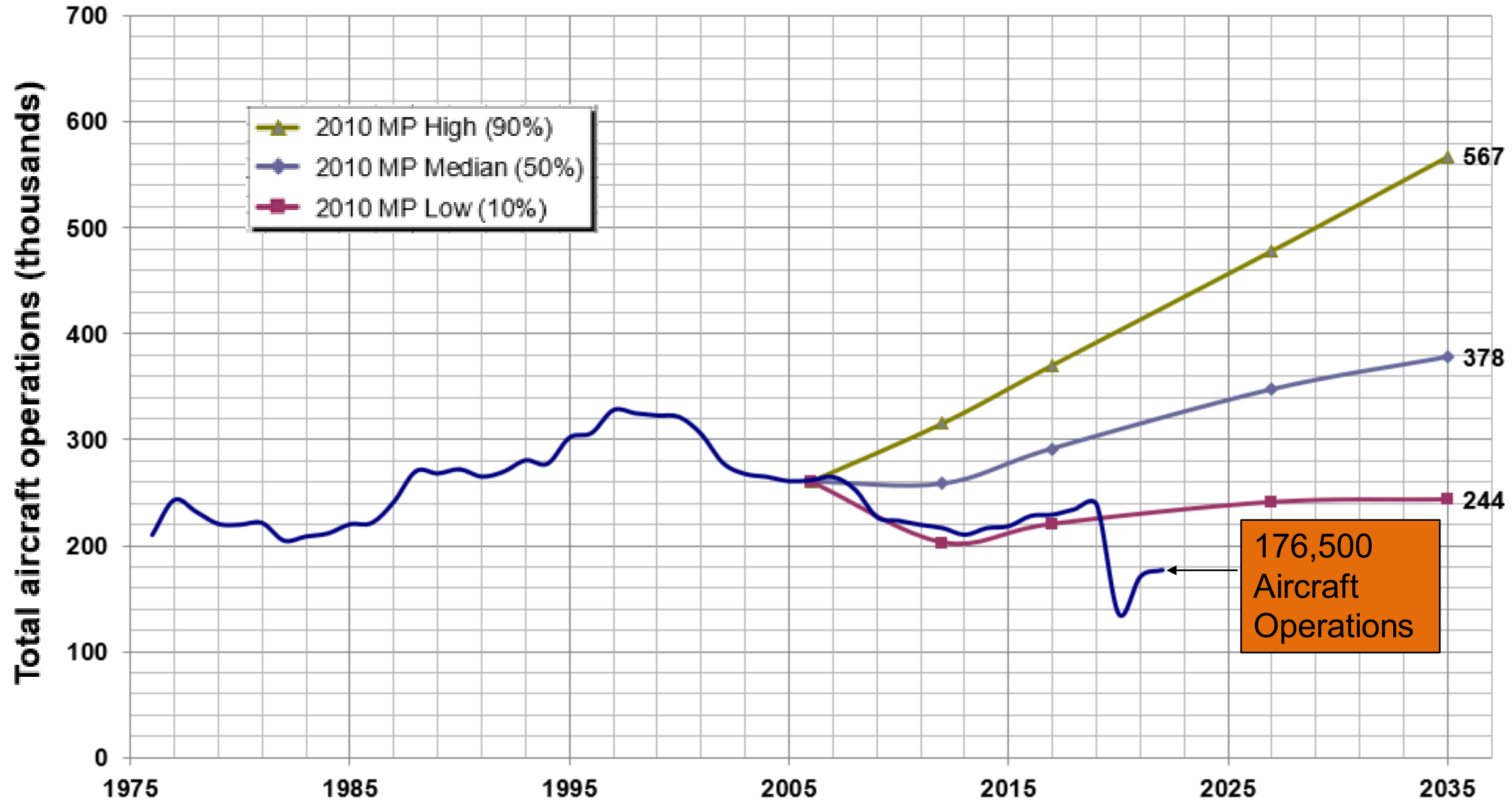
PDX PROBABILISTIC FORECASTS OF ENPLANED PASSENGERS



Sources: Historical: Port of Portland records. 2010 Master Plan forecasts: Jacobs Consultancy and NEXTOR, April 2008



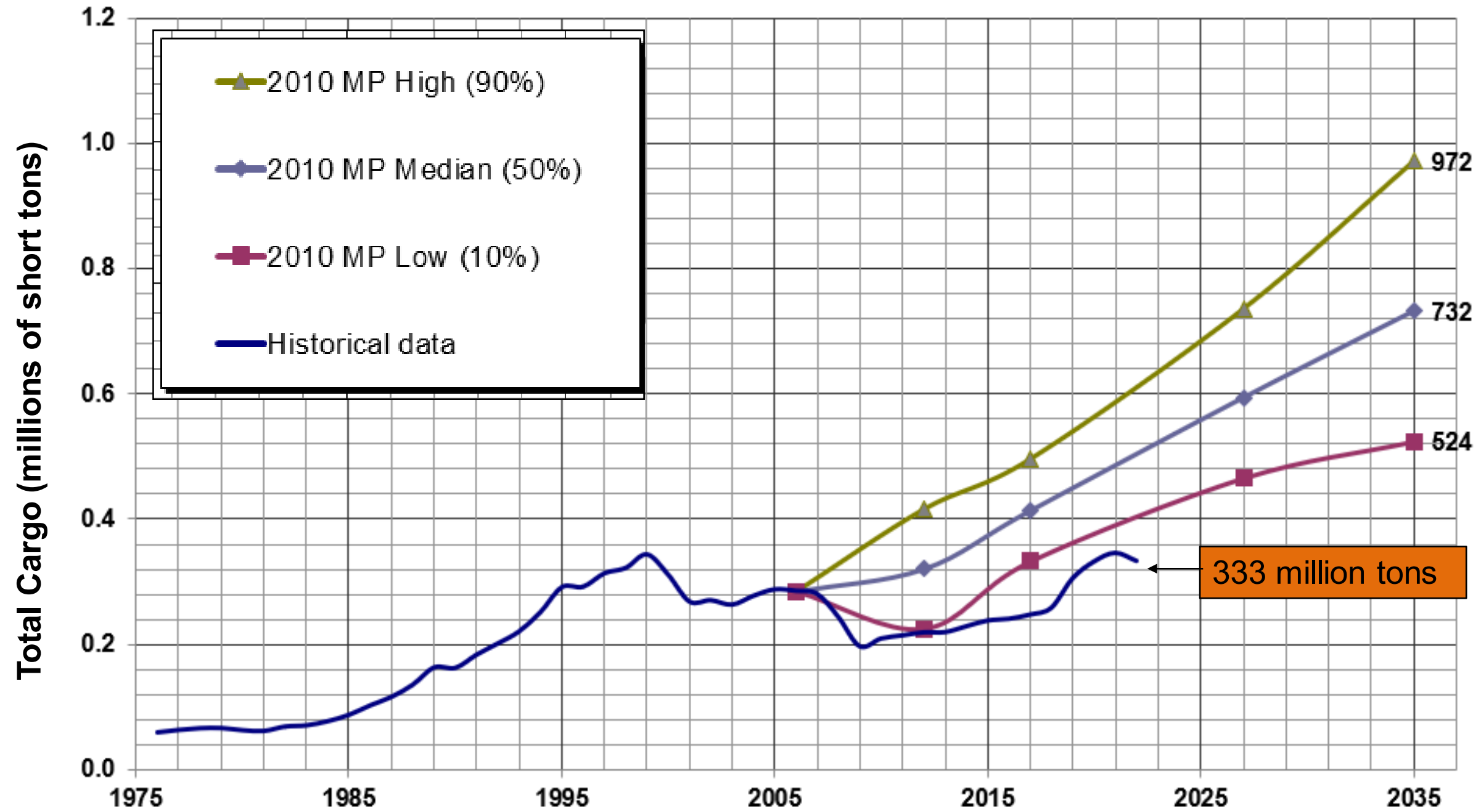
PDX TOTAL AIRCRAFT OPERATIONS FORECASTS



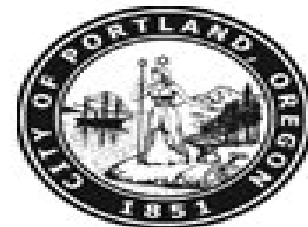
Sources: Historical: Port of Portland records. 2010 Master Plan forecasts: Jacobs Consultancy and NEXTOR, April 2008



PDX PROBABILISTIC FORECASTS OF TOTAL AIR CARGO

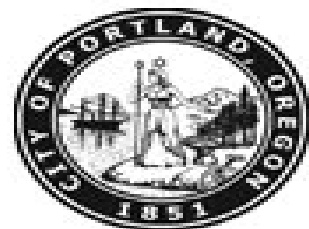


Sources: Historical: Port of Portland records. 2010 Master Plan forecasts: Jacobs Consultancy and NEXTOR, April 2008



Key Issues & Trends

- Significant uncertainty remains
- Passenger confidence improving
- Staff shortages (airlines, airports, other industries)
- Pilot & fleet shortages
- Rising & unstable fuel prices
- Geopolitical instability
- Business travel recovery
- Cargo growth & e-commerce
- Economic factors



Comparison of Actual to Forecast

RELATIONSHIPS AMONG PLANNING ACTIVITY LEVELS, YEARS, AND ACTIVITY BASED ON 50TH PERCENTILE FORECASTS

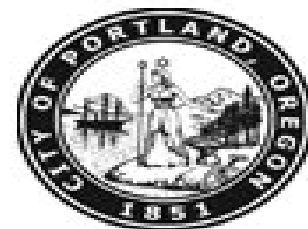
PAL	Year	Actual and forecast activity		
		Total passengers (millions)	Cargo (short tons, thousands)	Aircraft operations
Actual	2009	12.9	190	227,000
1	2012	15.0	322	258,000
2	2017	18.0	414	292,000
3	2022	20.6	496	318,000
4	2027	23.7	594	347,000
5	2035	26.8	732	378,000

PAL = Planning activity level.



Key Questions

- Is forecast still appropriate for planning purposes?
 - When do we expect to reach 21 Million Annual Passengers?
- We shouldn't expect a return to "normal" so what should we be thinking about?
 - Lasting impacts?
 - Opportunities?
 - Will the Master Plan take a fresh look at demand?



Committee Evaluation Form

CAC Members:

Evaluations for committee members have been emailed



2023 Meeting Dates

Third Wednesday of January, April, June and October

✓ JAN ▶▶	FEB	MAR	✓ APR 19
MAY	✓ JUN 21	JUL	AUG
SEP	OCT 18	NOV	DEC



Closing Comments

