BWI Marshall Airport
Stats and Figures
BWI Marshall Airport continues to grow!

- For the twelve months ending January 31, 2018
  - 25.28 million domestic passengers
  - 1.16 million international passengers

- Served by 17 carriers

- Including 12 domestic carriers and 5 international carriers

- We remain the busiest airport in the Washington/Baltimore region
  - Our passenger market share has increased to 36.3% from 35.6%!
Recent Passenger Trends

Continued Records!

<table>
<thead>
<tr>
<th>Month</th>
<th>Total Passengers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb</td>
<td>1,200,000</td>
</tr>
<tr>
<td>Mar</td>
<td>1,400,000</td>
</tr>
<tr>
<td>Apr</td>
<td>1,600,000</td>
</tr>
<tr>
<td>May</td>
<td>1,800,000</td>
</tr>
<tr>
<td>Jun</td>
<td>2,000,000</td>
</tr>
<tr>
<td>Jul</td>
<td>2,200,000</td>
</tr>
<tr>
<td>Aug</td>
<td>2,400,000</td>
</tr>
<tr>
<td>Sep</td>
<td>2,200,000</td>
</tr>
<tr>
<td>Oct</td>
<td>2,000,000</td>
</tr>
<tr>
<td>Nov</td>
<td>1,800,000</td>
</tr>
<tr>
<td>Dec</td>
<td>1,600,000</td>
</tr>
<tr>
<td>Jan</td>
<td>1,200,000</td>
</tr>
</tbody>
</table>
International Traffic

Total Int'l Passengers

- 12 Months Ending Jan 17
- 12 Months Ending Jan 18
Cargo Traffic

Total Air Cargo

- 12 Months Ending Jan 17
- 12 Months Ending Jan 18
BWI Marshall Airport has nonstop service to nearly 90 domestic and international destinations

*Seasonal service
Source: Innovata (June 2018)
Air Service Update
Summer 2018 Expectations

June
• Seats up 3.4% on 2.4% more departures
• International seats increasing 27.4%!

July
• Seats increasing 3.4%
• International seats up 30.8%

August
• Departures flat, but seats still up 2.3%
• International seats up a whopping 43.4%!
Air Canada will add daily nonstop service from BWI Marshall Airport to Montreal in May.

Air Canada will also increase the seats to Toronto by adding EMB175 aircraft.

Leasing three ticket counter positions starting in May.
Alaska Airlines now flies nonstop to five West Coast destinations from BWI Marshall Airport!

They started daily service to San Francisco on October 16, 2017

Seasonal service to Portland resumes in June.
Icelandair will become BWI Marshall Airport’s newest carrier on May 28, 2018!

They will start seasonal service to Reykjavik.

Flights will operate four times weekly using 757-200 aircraft with 183 seats.
Spirit added two new markets from BWI Marshall Airport last week.

New service to both Montego Bay and Denver!

They are also adding a third daily flight to Atlanta this summer.
Vacation Express will add service from BWI Marshall Airport to both Cozumel and Freeport this summer!

They will also operate to Punta Cana again this summer

Flights will be operated by Swift Air using either 737-300 or 737-400 aircraft.
WOWair is increasing service for the summer peak!

- A second daily flight will operate four times weekly between mid-May and mid-September.
- Arrivals at 23:45 and departures at 00:45.
Overview

**ECONOMIC IMPACT OF BWI**

- **$9.3 BILLION** Total Economic Impact
- **106,488** Total Jobs
- **4.1 BILLION** Total Earnings
- **591.9 MILLION** Total State & Local Taxes

**AIRPORT-GENERATED**

- **$4.4 B** Total Economic Impact
- **24,211** Total Jobs
- **$1.6 B** Total Earnings
- **$175.4 M** Total State/Local Taxes

**VISITOR-GENERATED**

- **$4.9 B** Total Economic Impact
- **82,277** Total Jobs
- **$2.5 B** Total Earnings
- **$416.5 M** Total State/Local Taxes
Overview

IMPACT ON STATE AND LOCAL REVENUE (MILLIONS)

State Taxes $336.2
Local Taxes $255.7
Employment

<table>
<thead>
<tr>
<th></th>
<th>Generated</th>
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<tbody>
<tr>
<td>AIRPORT</td>
<td>12,753</td>
</tr>
<tr>
<td>VISITOR</td>
<td>46,857</td>
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<table>
<thead>
<tr>
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<tbody>
<tr>
<td>AIRPORT</td>
<td>12,753</td>
</tr>
<tr>
<td>Direct Jobs</td>
<td>12,753</td>
</tr>
<tr>
<td>VISITOR</td>
<td>46,857</td>
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<tr>
<td>Direct Jobs</td>
<td>46,857</td>
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<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Induced &amp; Indirect Jobs</td>
<td>11,458 + 35,420</td>
</tr>
<tr>
<td></td>
<td>= 46,878</td>
</tr>
<tr>
<td>Total Jobs</td>
<td>= 82,277</td>
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</table>
Employment

AIRPORT AND VISITOR DIRECT JOBS BY SECTOR

- Travel Agents 0.3%
- Freight Transportation 0.7%
- Construction/Consulting 1.7%
- In-Town Transportation 2%
- Ground Transportation 2.7%
- Retail 4.1%
- Entertainment 4.8%
- Restaurant 39.2%
- Airline/Airport Services Sector 16.3%
- Hotel 28.2%
RESIDENCY
Airport-generated direct job holders reside in Maryland and the surrounding states.

- Delaware: 0.8%
- Montgomery County: 1.4%
- Carroll County: 1.5%
- Prince Georges County: 2.6%
- Southern Pennsylvania: 2.7%
- Harford County: 2.8%
- Howard County: 4.8%
- Other Maryland: 5.9%

Baltimore County: 21.2%
Anne Arundel County: 25.7%
Baltimore City: 30.6%
Connected to the World

5.8 M Visitors

In-Town Transportation $149.2
Entertainment $245.2

Retail $693.1
Restaurant $1,287.5
Hotel $1,739.5

$4,114.5 M Visitor-generated Revenue/Purchases
### Visitor Expenditures

<table>
<thead>
<tr>
<th>Category</th>
<th>Length of Stay (Nights)</th>
<th>Expenditures Per Day</th>
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</thead>
<tbody>
<tr>
<td>Domestic Business</td>
<td>2.6</td>
<td>$281</td>
</tr>
<tr>
<td>Domestic Pleasure</td>
<td>3.1</td>
<td>$153</td>
</tr>
<tr>
<td>International Business</td>
<td>4.9</td>
<td>$269</td>
</tr>
<tr>
<td>International Pleasure</td>
<td>4.5</td>
<td>$169</td>
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</tbody>
</table>
Connected to the World

Number of Destinations: 90
Number of Passengers ANNUALLY: 25,686,444
Number of Passengers PER DAY: 70,374

Number of Flights ANNUALLY (Total Ops including Cargo/GA): 253,238
Number of Flights PER DAY: 694

Based on FY 2017 (PAX AND FLIGHTS PER DAY BASED ON TOTAL/365)
Flow of Economic Impact

Maryland Airport Activity

Business Revenue

RETAINING EARNINGS, DIVIDENDS & INVESTMENTS

Payroll

Local Purchases

Direct Jobs

Personal Income (re-spending)

Induced Jobs

Indirect Jobs

TAXES
## Improving Customer Experience

### CAPITAL EXPENSE SUMMARY

<table>
<thead>
<tr>
<th>Year</th>
<th>Amount</th>
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<tbody>
<tr>
<td>FY16</td>
<td>$253 M</td>
</tr>
<tr>
<td>FY17</td>
<td>$177 M</td>
</tr>
<tr>
<td>FY18 through FY22</td>
<td>$374 M</td>
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</tbody>
</table>
Improving Customer Experience

AIRPORT UPGRADES

**TERMINAL UPGRADES**
- Green: The Concourse D and E connector project provides additional international airline capacity and new passenger services, including a new security checkpoint to serve domestic and international passengers.
- Orange: The Concourse B and C project provides a new security checkpoint and connector.
- Yellow: Concourse E expansion provides additional international capacity.

**AIRFIELD UPGRADES**
- Blue: Pavement rehabilitation improvements and new pavement construction.
- Light Green: Runway safety improvements.
- Purple: Cargo expansion.
BWI Marshall Airport Facilities
## Major Initiatives Funded in FY 2018-2023 CTP

<table>
<thead>
<tr>
<th>No.</th>
<th>Project Name</th>
<th>Cost ($ Million)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>International Concourse Extension</td>
<td>113.4</td>
</tr>
<tr>
<td>2</td>
<td>Concourse B Apron Pavement Reconstruction</td>
<td>10.4</td>
</tr>
<tr>
<td>3</td>
<td>Airfield Lighting Vault Relocation</td>
<td>35.7</td>
</tr>
<tr>
<td>4</td>
<td>Concourse D HVAC Replacement</td>
<td>17.0</td>
</tr>
<tr>
<td>5</td>
<td>FIS Hall Reconfiguration</td>
<td>10.0</td>
</tr>
<tr>
<td>6</td>
<td>B737-800 Modifications on Concourses A and B</td>
<td>5.4</td>
</tr>
<tr>
<td>7</td>
<td>Relocation of RTR</td>
<td>2.2</td>
</tr>
<tr>
<td>8</td>
<td>Aircraft Maintenance Facility Infrastructure</td>
<td>55.0</td>
</tr>
<tr>
<td>9</td>
<td>Residential Sound Insulation Program</td>
<td>45.0</td>
</tr>
<tr>
<td>10</td>
<td>** Loading Bridge Replacement Program</td>
<td>12.7</td>
</tr>
<tr>
<td>11</td>
<td>** Restroom Improvement Program</td>
<td>54.0</td>
</tr>
</tbody>
</table>

**Not Displayed on Exhibit

Total $360.8 M

Note: Cost estimates from MDOT-MAA Consolidated Transportation Program (CTP) FY2018-2023
International Concourse Extension

**Description:**
Extension of the International Concourse by 150’ for additional six gates (two for arrivals and departures, four for arrivals only). Includes installation of Automated Passport Control kiosks, additional bag claim units, and new public restrooms.

**Cost:**
$113.4 million

**Funding Source(s):**
PFC

**Time Frame:**
Phase 1 improvements to FIS hall open to service; concourse extension to open in FY 2019.
Concourse E Extension – 6 Gates

• 2018:
  – Concourse E Extension (total after completion of 10 international gates for arrivals and departures, plus 4 “arrivals only” gates)
Concourse E Extension – 6 Gates

- Concourse E Extension
  - Adds 2 permanent and 4 “arrival only” gates
  - 14 total gates available
Concourse B Apron Pavement Reconstruction

**Description:**
Reconstruction of the apron pavement from gates B6 thru B15.

**Cost:**
$10.4 million

**Funding Source(s):**
TTF/AIP

**Time Frame:**
Construction to begin spring 2018 and will staged to minimize impacts to operations; work will occur over two construction seasons.
Airfield Lighting Vault Relocation

**Description:**
Relocation of the existing lighting vault to a grass area outside of the intersection of Taxiways P and U. Includes demolition and pavement of the area for the old vault and infill pavement of grass areas between Taxiways T and P.

**Cost:**
$35.7 million

**Funding Source(s):**
PFC/AIP

**Time Frame:**
Construction anticipated to occur FY 2019 thru FY 2021.
Concourse D HVAC Replacement

**Description:**
Replacement of existing HVAC systems serving Concourse DY and commuter portions of Concourse D. Includes replacement of ceilings through Concourses DX, DY and commuter areas.

**Cost:**
$17 million

**Funding Source(s):**
PFC

**Time Frame:**
Work anticipated to start in FY 2019 and complete in FY 2022.
FIS Hall Reconfiguration

**Description:**
Improvements to increase throughput of Federal Inspection Services area by implementing CBP’s new “Baggage First” processing, adding queuing space and additional passport kiosks and CBP processing areas.

**Cost:**
$10 million

**Funding Source(s):**
TBD

**Time Frame:**
Work anticipated to start in FY 2019 and complete in FY 2021.
B737-800 Modifications on Concourses A and B

**Description:**
Expansion of holdrooms to accommodate B737-800 aircraft and construction of new emergency egress stairs.

**Cost:**
$5.4 million

**Funding Source(s):**
PFC

**Time Frame:**
Holdroom improvements open to service, construction of egress stairs expected to start in FY 2019.
Aircraft Maintenance Facility Infrastructure

**Description:**
Provide infrastructure improvements (utilities and site grading) to support a new aircraft maintenance facility adjacent to Taxiway F.

**Cost:**
- $5 million preliminary services
- $50 million est. construction

**Funding Source(s):**
- TTF

**Time Frame:**
- Design in FY2018
- Construction - TBD

FAA approved ALP (2015)
Loading Bridge Replacement Program

**Description:**
Purchase and installation of 15 new passenger boarding bridges (PBBs) at various gates; and installation of Pre-Conditioned Air and 400Hz power units on international common use gates.

**Cost:**
$12.7 million

**Funding Source(s):**
TBD

**Time Frame:**
Substantially complete – open to service.
Restroom Improvement Program

**Description:**
Renovation and expansion of public restroom facilities throughout the terminal.

**Cost:**
$54 million

**Funding Source(s):**
PFC

**Time Frame:**
Work will be phased to minimize impacts to airport patrons. Work anticipated to start in FY 2019 and complete in FY 2023.

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**Upper Level – 32 Restrooms**

**Lower Level – 9 Restrooms**

X = Concourse ID