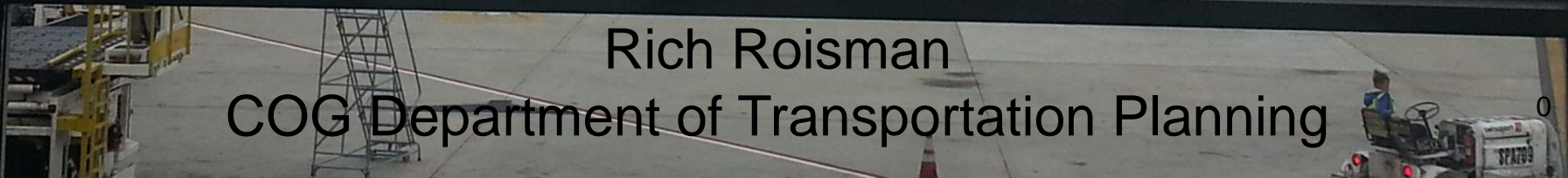


Status Report on the Region's Airports

COG Board of Directors
October 8, 2014



Rich Roisman
COG Department of Transportation Planning



A Well-Functioning Airport System Is Vital to Our Region's Economy

Economic Impact of BWI

- ▶ \$5.6B in business revenue
- ▶ \$3.6B in personal income
- ▶ \$2.0B in local purchases
- ▶ \$721M in state/local/aviation taxes
- ▶ 93,791 jobs

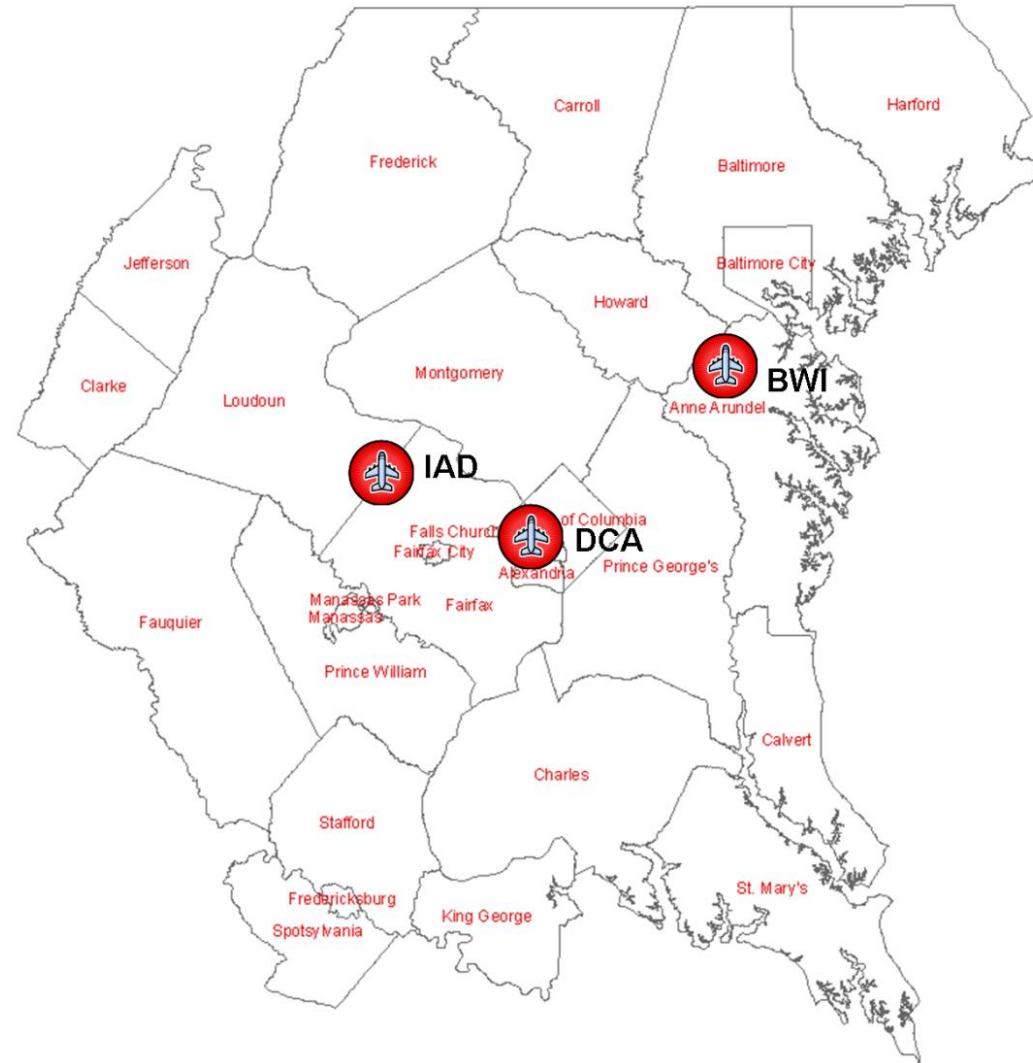
Economic Impact of DCA+IAD

- ▶ \$19.8B in business revenue
- ▶ \$14.6B labor income
- ▶ \$3.1B in state/local/aviation taxes
- ▶ 371,000 total jobs

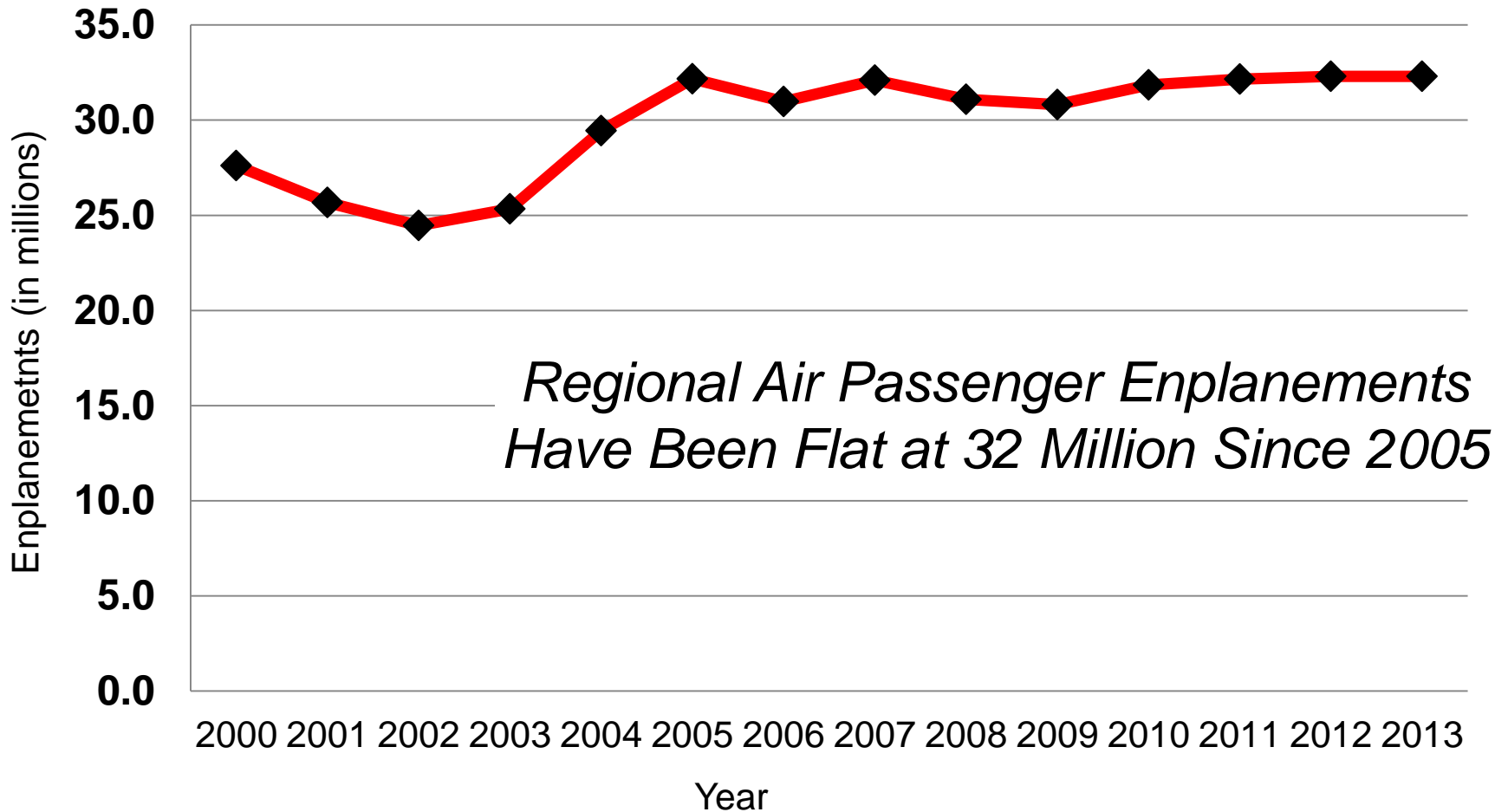
Sources: The Regional and Local Economic Impacts of the Baltimore/Washington Thurgood Marshall Airport, July 2011; MWAA 2012 Economic Impact Study, May 2014

Having Three Commercial Airports is a Key Regional Asset

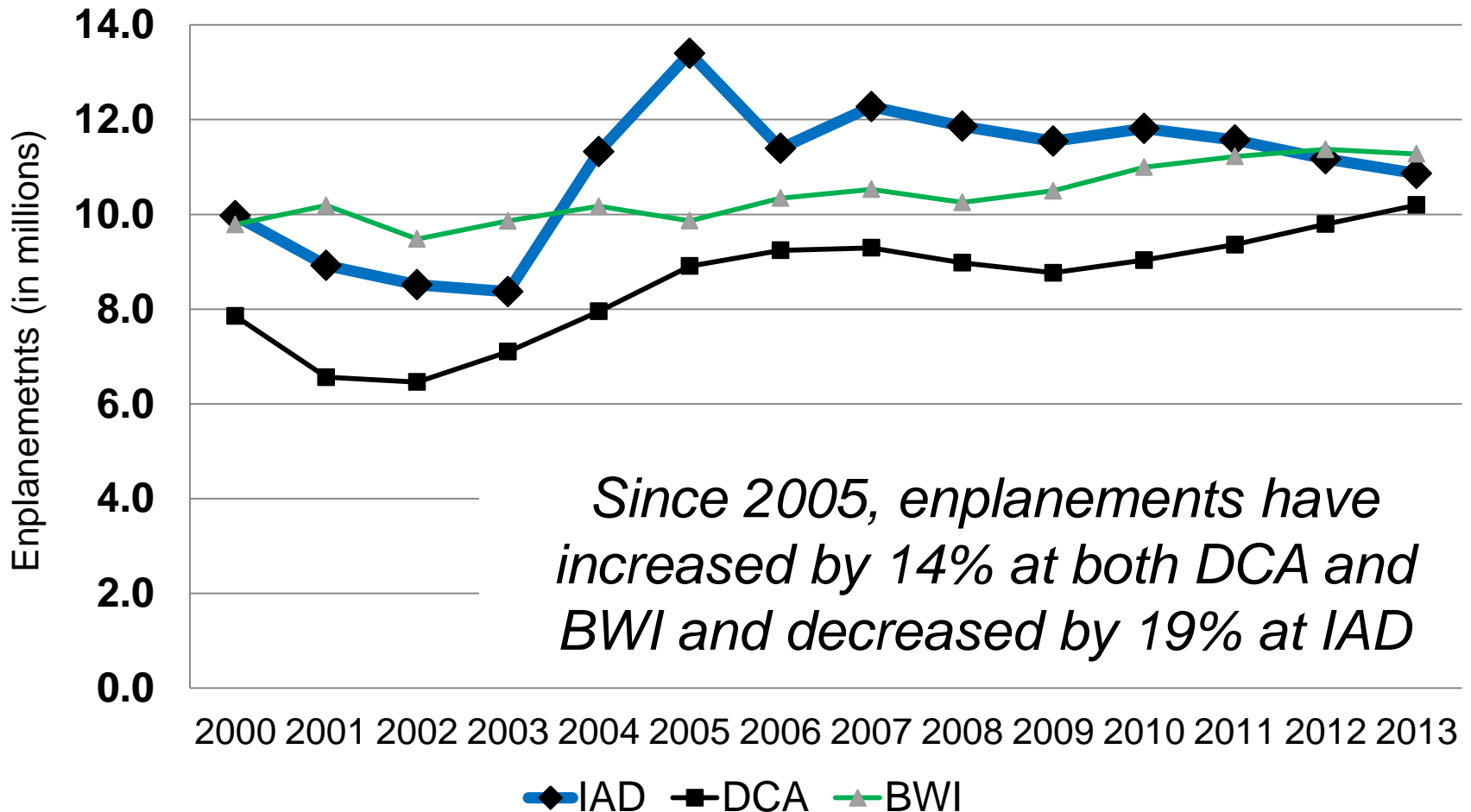
- ▶ Historically, three airports with three distinct markets
- ▶ Serve air passengers and air cargo
- ▶ Multimodal ground access



Regional Air Passenger Enplanements Trend (2000 – 2013)

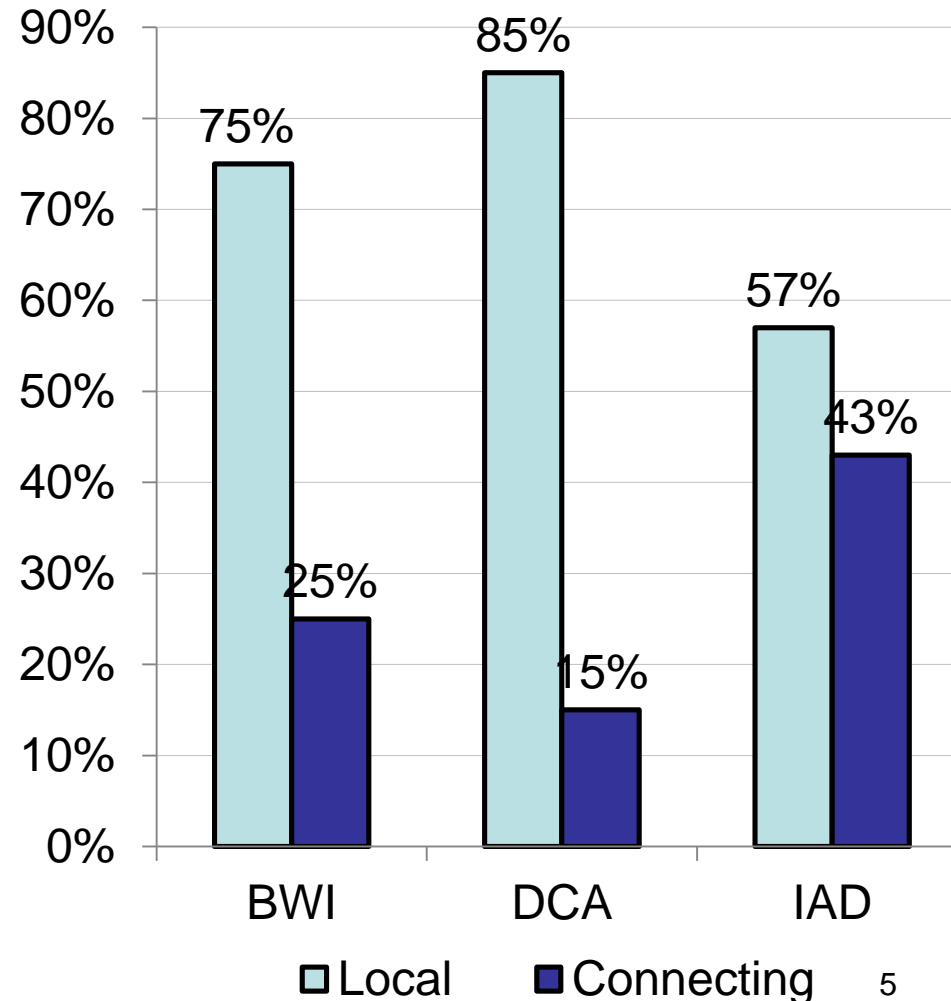


Regional Air Passenger Enplanements Trend (2000 – 2013) by Airport



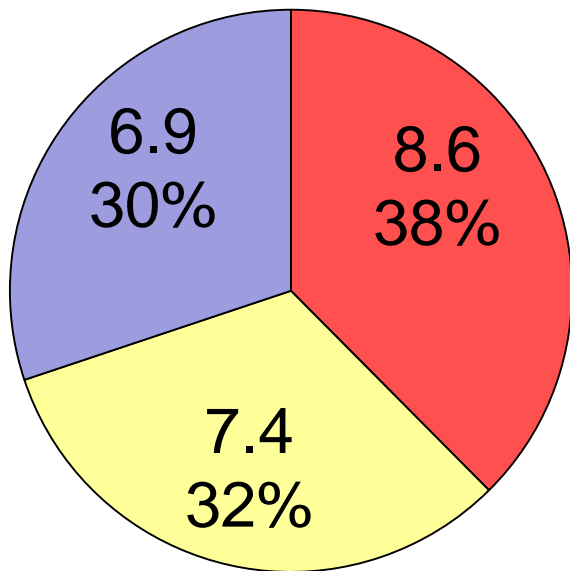
Locally Originating vs. Connecting Passengers (2013 Survey)

- ▶ Locally originating passengers use the regional surface transportation network to access the airport
- ▶ Connecting passengers are often flying an airline for which the airport is a hub or focus city



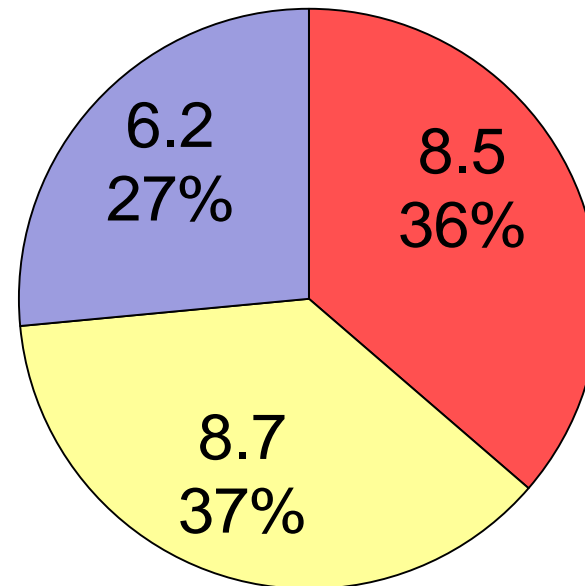
Change in Locally Originating Passengers by Airport (Survey)

2005

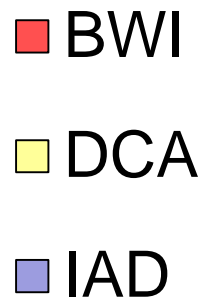


22.9 Million

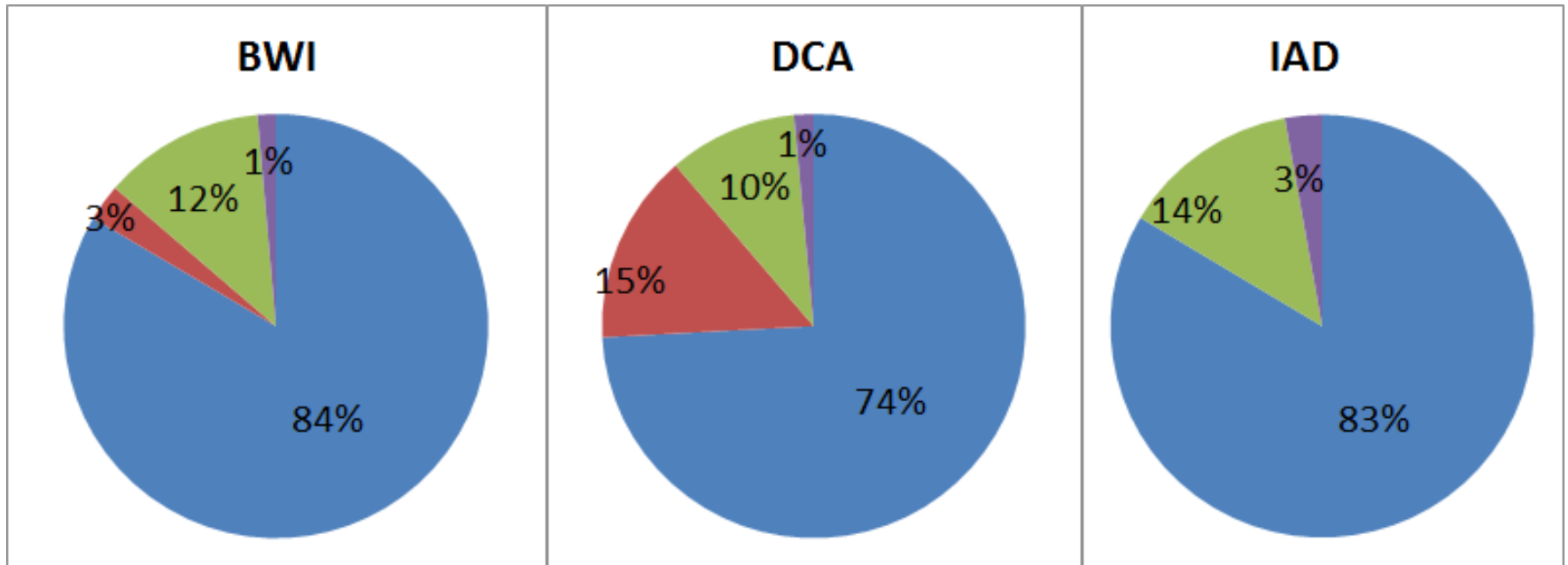
2013



23.4 Million

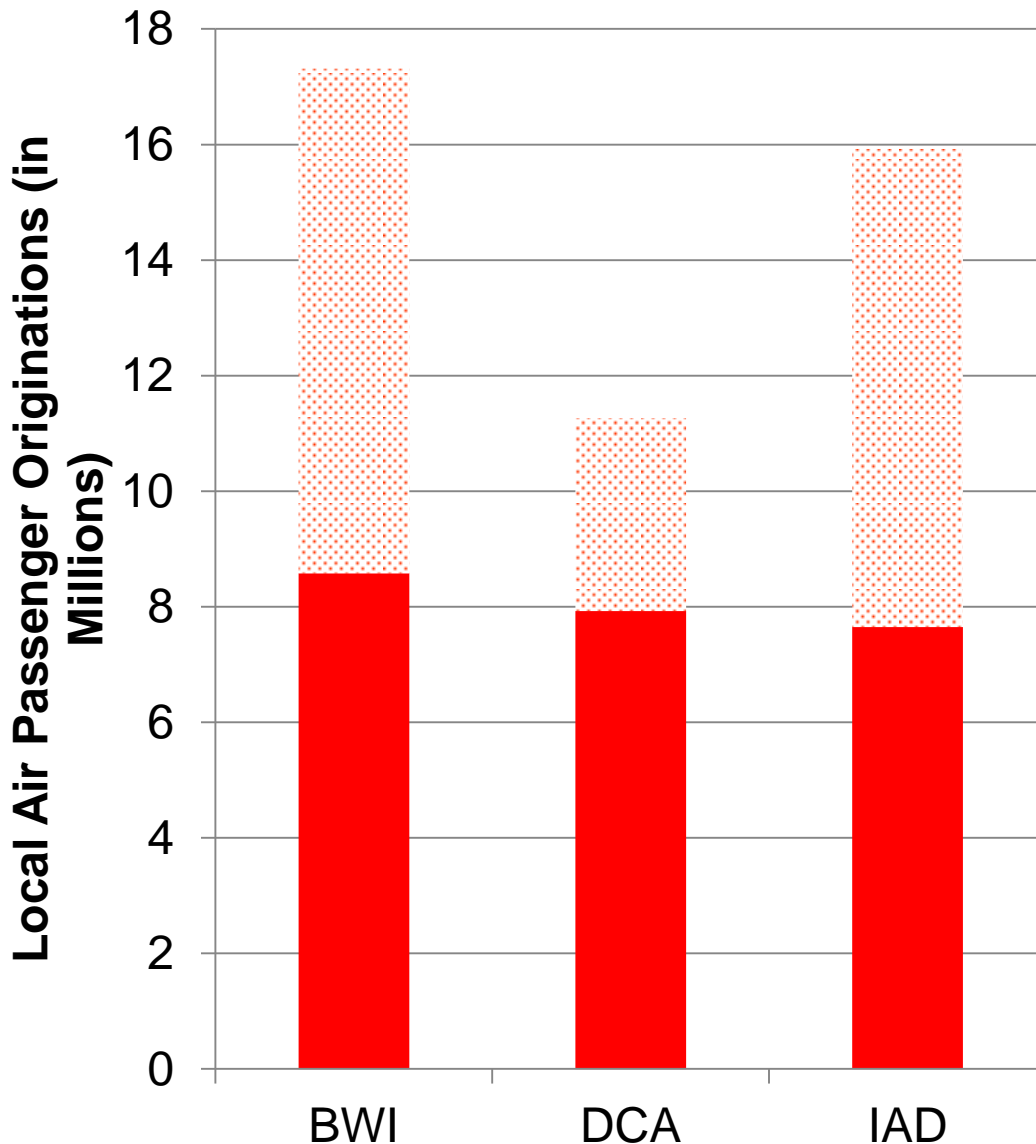


Locally Originating Airport Trip Mode of Access (2013 Survey)



- Private Car / Rental Car / Taxi
- Metrorail / Light Rail / Amtrak
- Airport Bus / Van / Limo + Hotel / Motel Bus
- Metrobus / MTA Bus / Other

Historic and Forecast Growth in Local Air Passenger Originations*



Percent Change

Airport	1980-2010	2010-2040
BWI	399%	102%
DCA	26%	42%
IAD	507%	108%

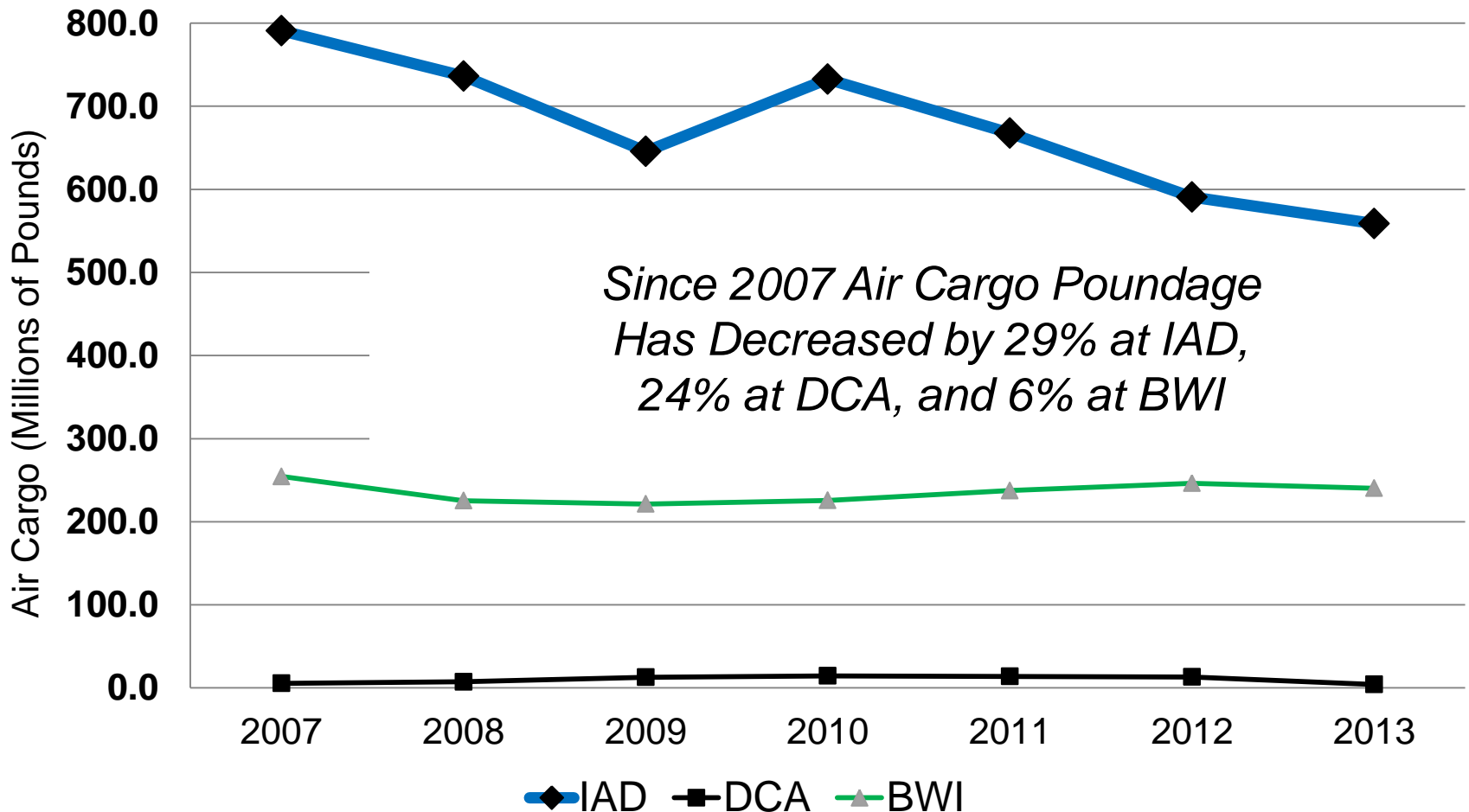
▨ FAA Forecast Growth
2010-2040
■ 2010

*Excludes connecting passengers and ground access trips originating outside the air systems region

Factors Influencing Airport Choice by Trip Purpose (2013 Survey)

	Business	Non-Business	All
Closest airport	59%	53%	55%
Better public ground transportation	2%	3%	3%
Better access roads and parking	3%	3%	3%
More convenient flight times	9%	8%	8%
Only airport with direct flight	7%	6%	6%
Less expensive airfare	10%	19%	16%
Frequent flyer with specific airline	4%	3%	3%
Only airport serving market	3%	2%	2%
Other	3%	3%	3%

Regional Air Cargo Trends (2007 – 2013) by Airport



Summary

- ▶ Our three commercial airports are a key regional asset vital to the region's economy
- ▶ Our airports have made significant investments to direct and support the majority of future growth in air passengers and air cargo at BWI and IAD
- ▶ A well-functioning and balanced three airport regional system in the Washington-Baltimore area ensures the safe and efficient movement of air passengers and air cargo to and from our region