



METROPOLITAN WASHINGTON
AIRPORTS AUTHORITY

ECONOMIC IMPACT STUDY - 2009

Presentation to:



Metropolitan Washington Council of Governments
Cooperative Forecasting and Data Subcommittee

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A Multimodal Transportation Agency

- **Aviation**

Reagan National Airport and Dulles International Airports

- 20.3 million passenger enplanements
- 620 million pounds of air freight

- **Dulles Toll Road**

- 108.7 million transactions
- \$64.9 million in toll revenue

- **Dulles Corridor Metrorail Project**

- 23-mile extension of existing regional rail system under construction



Economic Impact Study Basics

- Key drivers: Airports Authority capital and O&M expenditures, visitor spending, airport dependent industries
- Impact Areas: Washington DC MSA, Virginia, DC, and Maryland
- Local spending by Airports Authority, its employees and by airport users (visitors and airport dependent firms) will trigger a multiplier effect, supporting additional jobs throughout the region.
- The magnitude of the Multiplier Effect was estimated with the IMPLAN input-output modeling system; measured in jobs, labor income and associated tax impacts

Impact estimation includes:

DIRECT EFFECT:
On-site jobs
(e.g., Jobs at the airports, toll road, metrorail construction site)

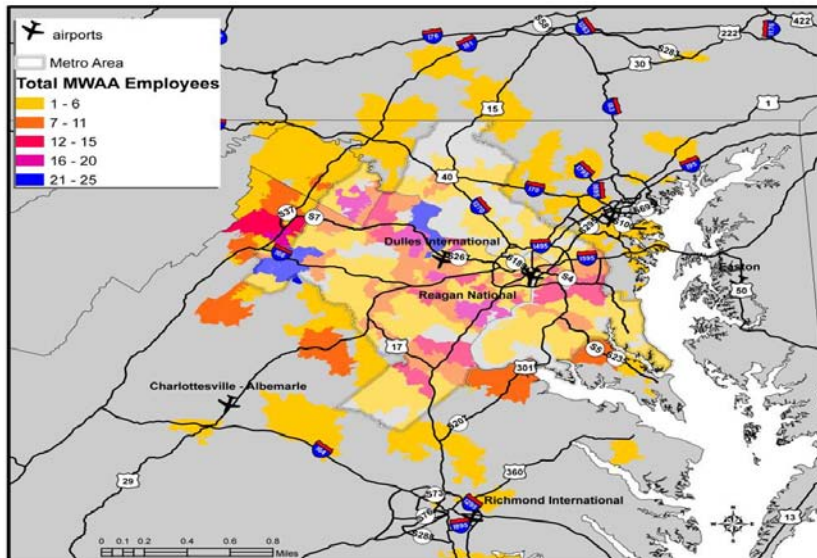
INDIRECT EFFECT:
Jobs supported by spending at local businesses
(e.g., Jobs supported by purchasing by Airports Authority purchases)

INDUCED EFFECT:
Jobs supported by local household spending
(e.g., Jobs supported by household spending by Airports Authority employees, by vendor employees)

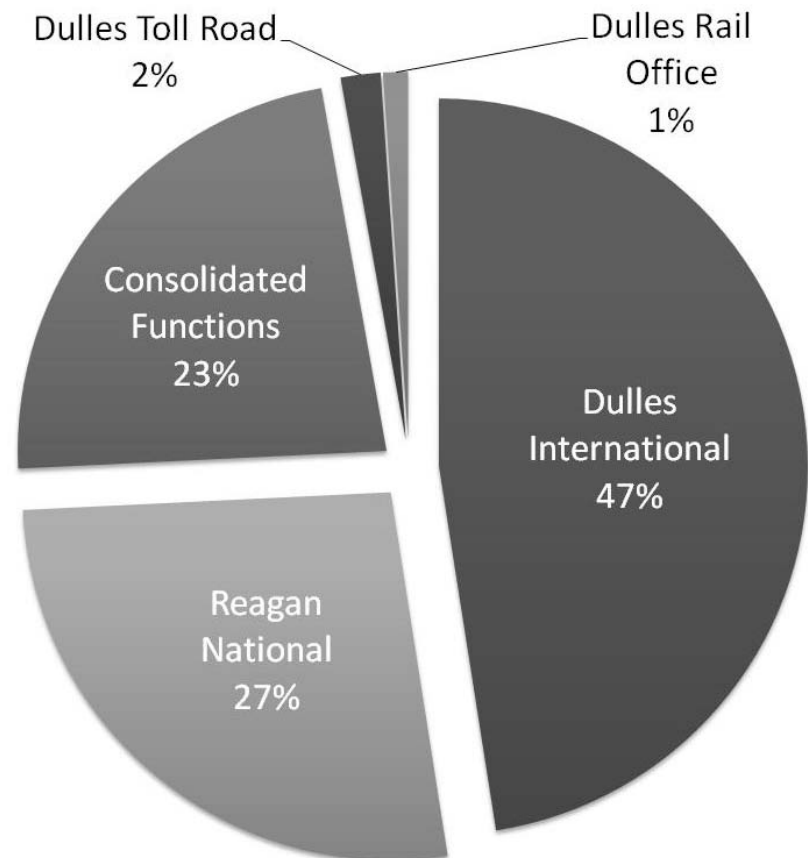


Airports Authority Employment

- 1,346 full-time and 28 part-time employees
- \$93.7M payroll, \$84.7M of which went to employees residing in the 22-county metro region



MWAAs Employment Distribution by Function





Aviation

Key Impact Drivers:

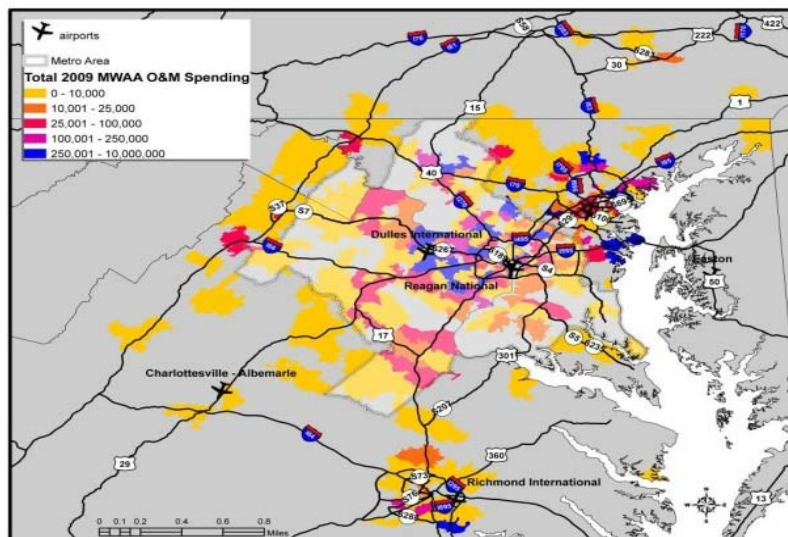
- Airport Operations
- Capital Projects
- Airport Dependent Industries
- Visitor Industry



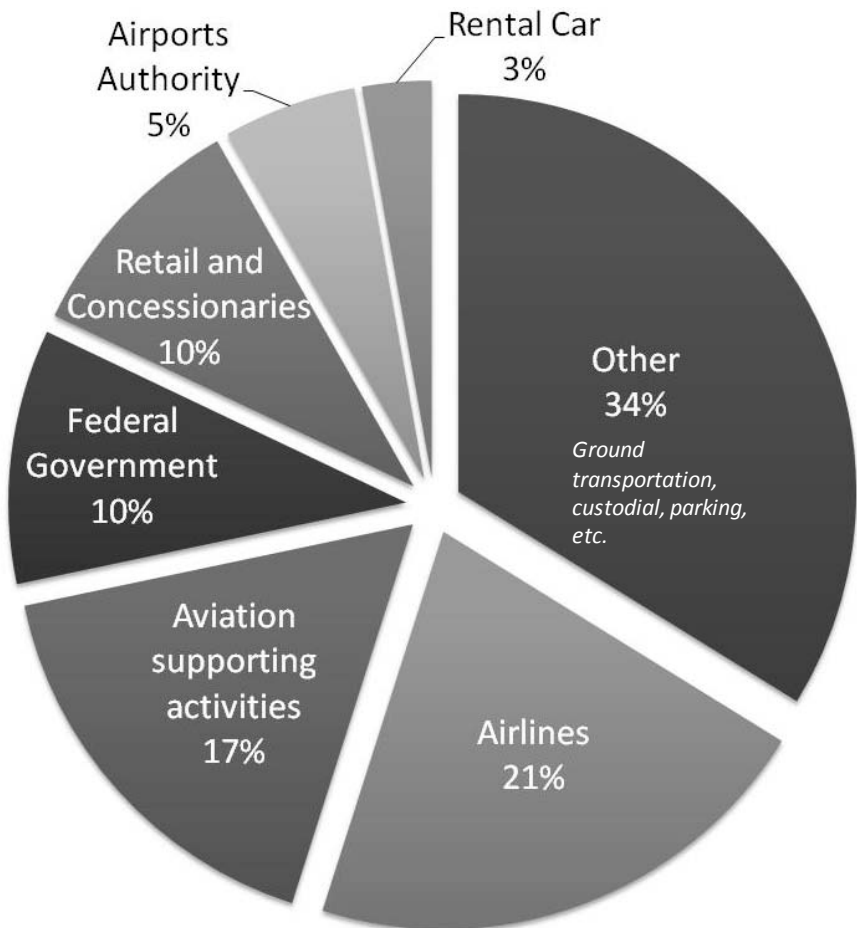


Airport Operations

- More than 24,000 On-site Jobs
- Additional 6,400 Flight crew based at Dulles and Reagan
- Total Aviation related O&M expenditures in 2009: \$134.8M, \$68.8M of which spent at vendors located in VA, MD, and DC



Airports Employment Distribution by Function





Airport Capital Expenditures

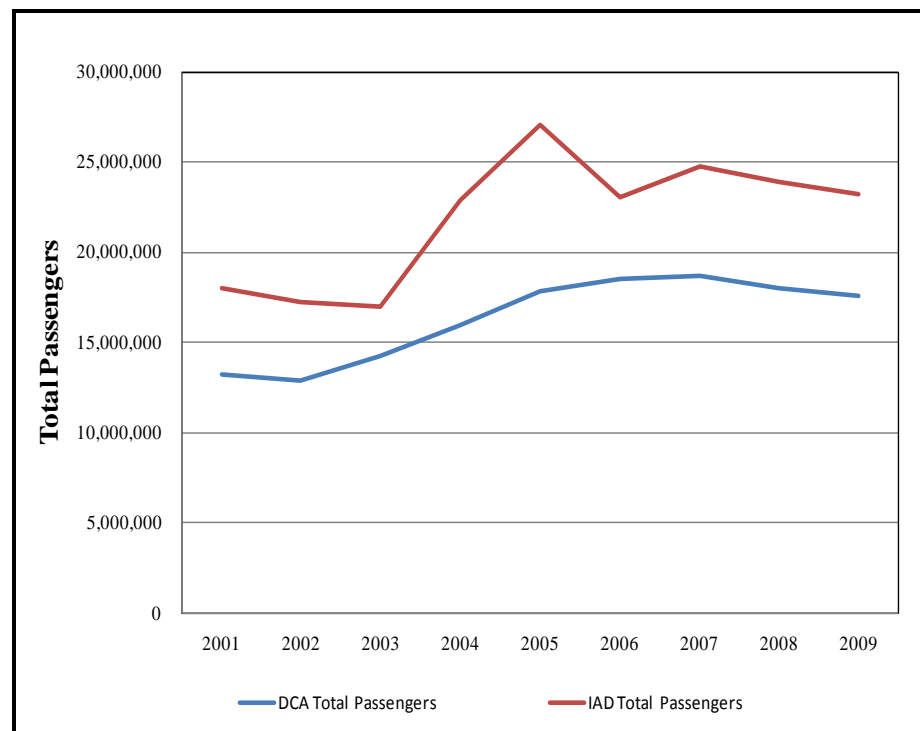
- Dulles International Airport
 - \$256.5M in spending
 - 1,200 direct jobs
 - \$85.0M in direct labor income
- Reagan National Airport
 - \$56.3M in spending
 - 250 direct jobs
 - \$16.0M in direct labor income





Other Aviation Impacts

- Airport Dependent Industries
 - Access to air transport for exports and domestic shipments
 - \$5.2B goods produced in VA, DC, and MD
- Visitor Industries
 - 12.2 million arriving passengers were visitors
 - \$10.6 billion in visitor spending at hotels, transportation, restaurants, stores etc.

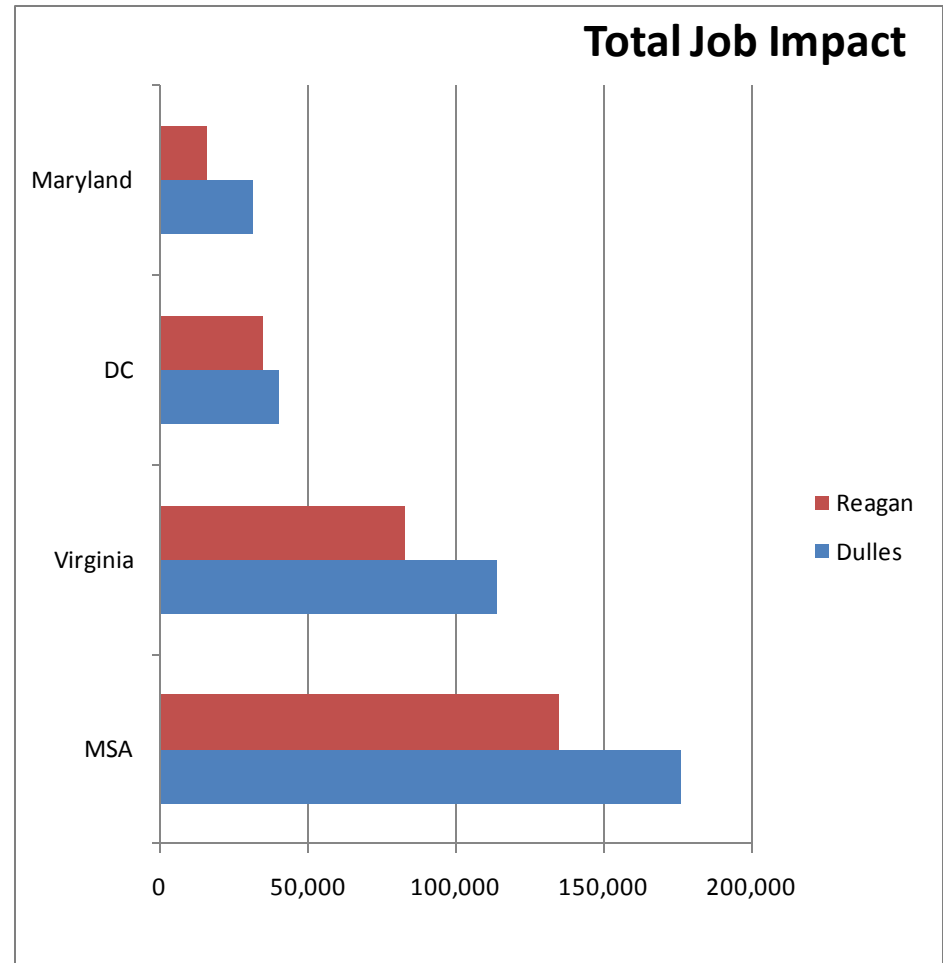




Total Impact of Aviation Activities

- **MSA** - 311,000 jobs and \$13.9 billion in labor income
- **VA** - 196,810 jobs, \$8.4 billion in labor income
- **DC** - 74,830 jobs, \$3.6 billion in labor income
- **MD** - 47,330 jobs, \$2.2 billion in labor income

Benchmark: Total Wage and Salary Employment
MSA: 3.2M; VA: 3.9M; DC: 0.8M; MD: 2.5M





Dulles Toll Road

- MWAA Operation since October 2009
- 25 Direct Jobs
- \$1.3M in payroll
- Other O&M expenditures: \$14.9M
- Capital expenditures: \$2.6M



Total Impact

- Over 480 jobs
- \$32 million in labor income
- \$2.3 million in tax income



Dulles Corridor Metrorail Construction

- \$362.9M Airports Authority spending in 2009
- 15 Airports Authority staff members
- Additional 200 construction workers and 300 other workers (Dulles Transit Partners, LLC)



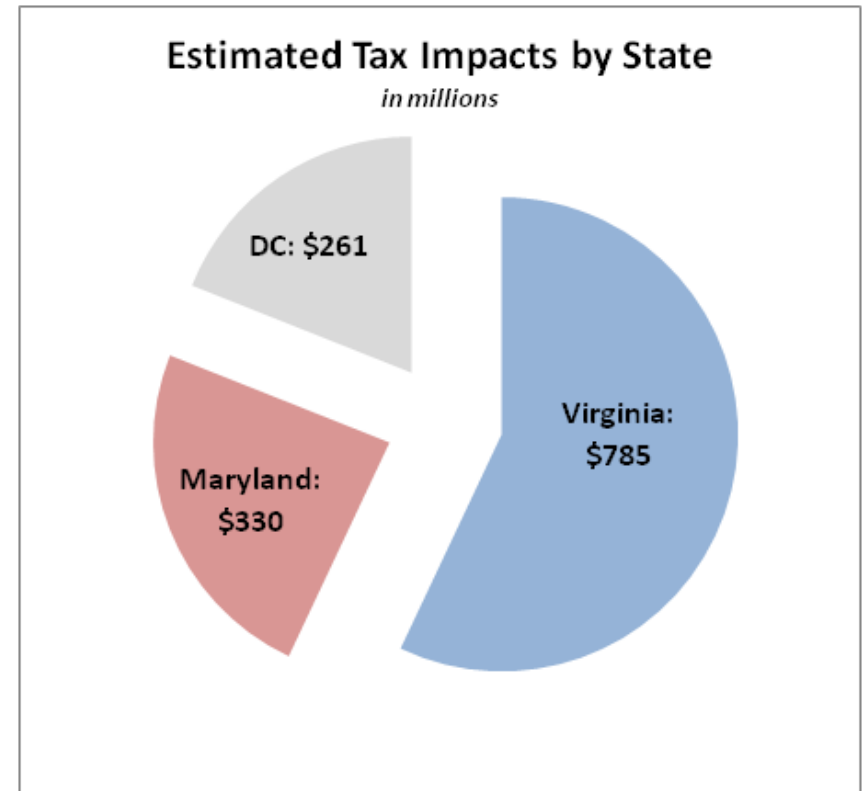
Total Impact

- Over 1,400 jobs
- \$96 million in labor income
- \$14.5 million in tax income



Economic Impact Summary

- **MSA** - 312,970 jobs and \$14.0 billion in labor income
- **VA** - 199,260 jobs, \$8.6 billion in labor income, and \$785.1 million in tax revenues
- **DC** - 74,910 jobs, \$3.6 billion in labor income, and \$261.1 million in tax revenues
- **MD** - 47,390 jobs, \$2.2 billion in labor income and \$329.3 million in tax revenues



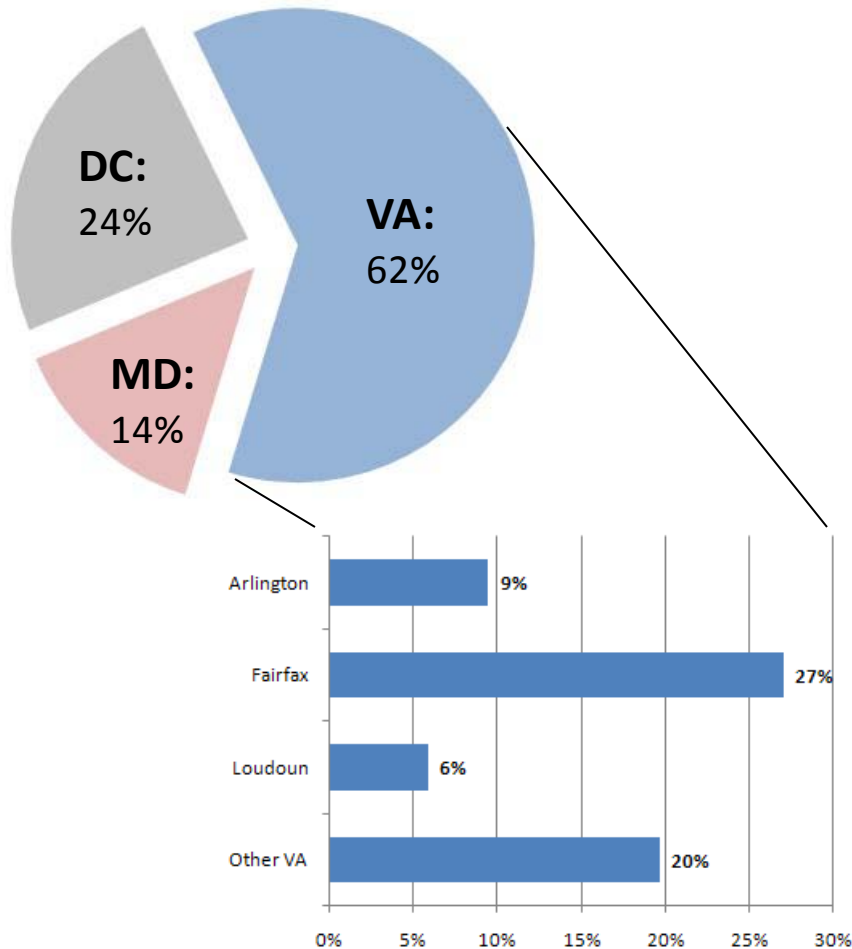
In addition:

Federal Aviation-Specific Taxes: \$618 million



Localized Impact Estimation

Estimated Distribution of Total Jobs Impacts



Estimated State and Local Tax Impact by Jurisdiction (\$ in millions)

Jurisdiction	National	Dulles	Total
Virginia			
Alexandria city, VA	\$ 3.2	\$ 3.2	\$ 6.4
Arlington county, VA	\$ 74.8	\$ 42.4	\$ 117.2
Fairfax county, VA	\$ 148.8	\$ 186.0	\$ 334.8
Loudoun county, VA	\$ 40.2	\$ 33.0	\$ 73.2
Prince William, county, VA	\$ 12.7	\$ 35.6	\$ 48.3
Fauquier, county, VA	\$ 9.2	\$ 11.2	\$ 20.4
Other Virginia	\$ 44.6	\$ 123.8	\$ 168.4
Maryland			
Montgomery county, MD	\$ 15.3	\$ 115.6	\$ 130.9
Prince Georges county, MD	\$ 25.2	\$ 55.2	\$ 80.4
Other Maryland	\$ 48.0	\$ 70.6	\$ 118.6
DC			
District of Columbia	\$ 131.8	\$ 128.9	\$ 260.7
Total Aviation	\$ 553.7	\$ 805.5	\$ 1,359.3