

J00I00 – MDOT – Maryland Aviation Administration

MDOT RESPONSE TO DLS ANALYSIS

Operating Budget Recommended Actions

1. Concur with the Governor's allowance.

MDOT Response:

MAA respectfully concurs with the recommendation.

PAYGO Budget Recommended Actions

1. Concur with the Governor's allowance.

MDOT Response:

MAA respectfully concurs with the recommendation.

Maryland Aviation Administration

February 4, 2016

Pete Rahn
Secretary
Maryland Department of Transportation

Ricky D. Smith, Sr.
Executive Director/CEO
Maryland Aviation Administration



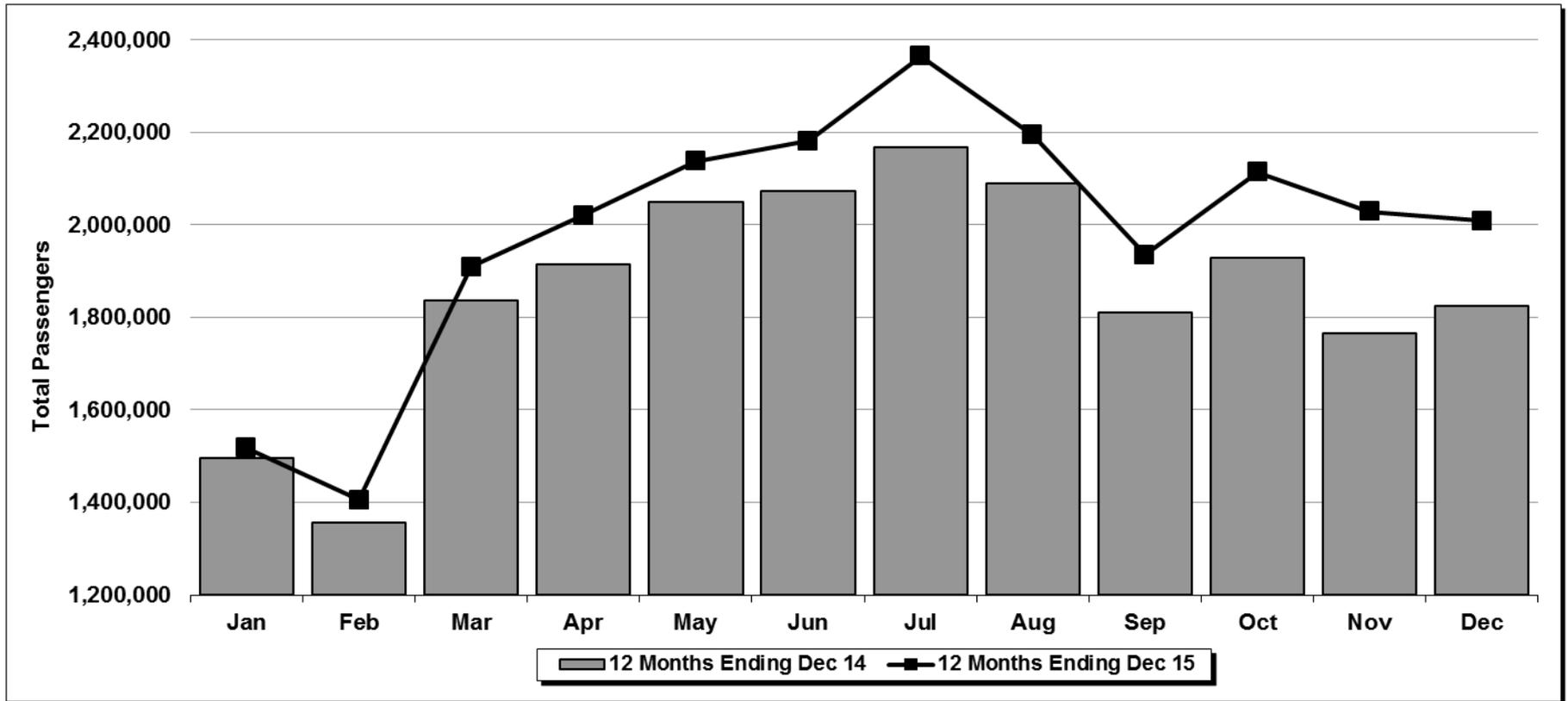
Business Update

Airport Generated Economic Activity

BWI Airport Generated Jobs	23,419
Visitor Generated Jobs	77,318
TOTAL JOBS	97,737
TOTAL BUSINESS REVENUE	\$7.0 billion

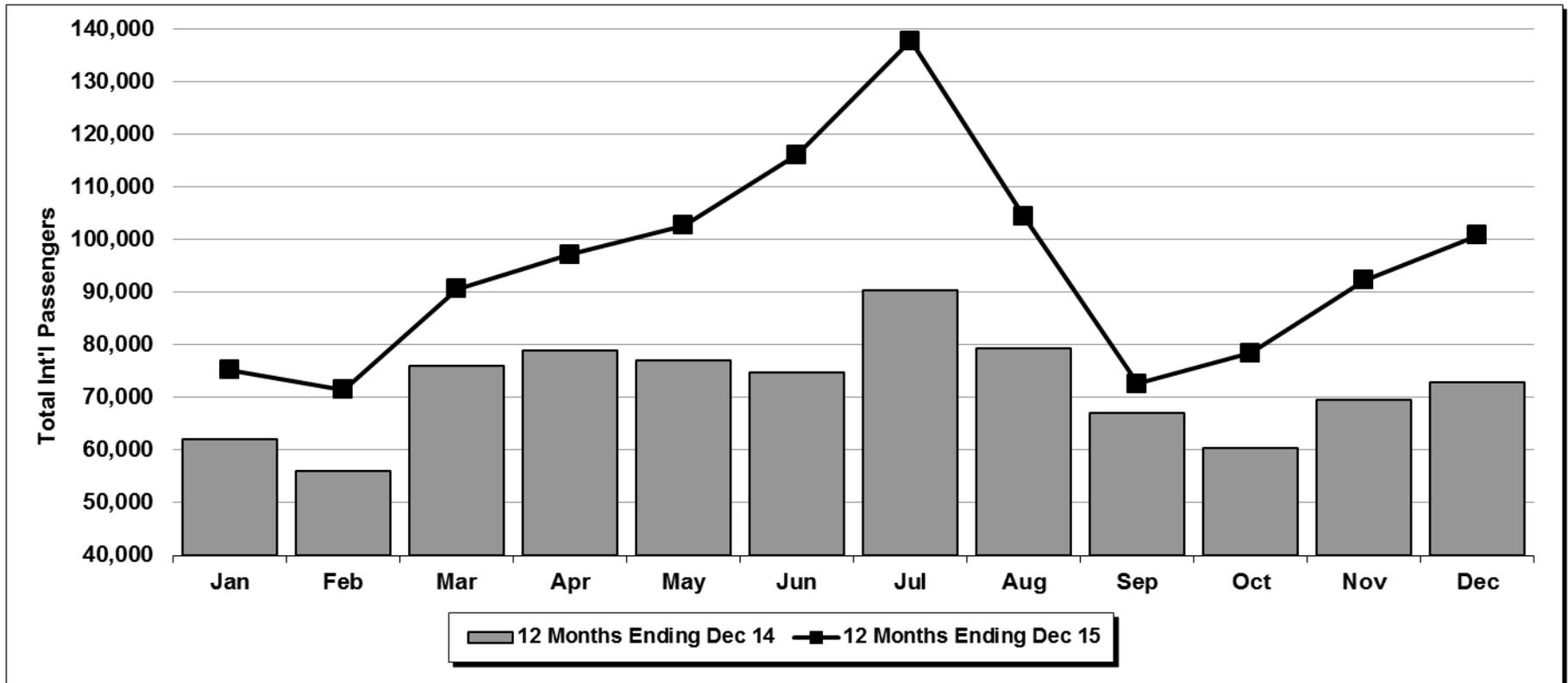
Recent passenger trends

Six Consecutive Monthly Records!



International passenger traffic

International Passengers - +31.8%



Business Update

New and Expanded International Service

– WOW Air

- Reykjavik, Iceland (May 2015)
- Increased service (June 2016)



– Condor

- Frankfurt, Germany (increased service May 2016)



– Norwegian

- Fort-de-France, Martinique (December 2015)
- Pointe-à-Pitre, Guadeloupe (December 2015)



– Southwest

- San Jose, Costa Rica (March 2015)
- San Jose de Cabo, Mexico (June 2015)
- Liberia, Costa Rica (November 2015)



Business Update

New and Expanded Domestic Service

– Allegiant

- Savannah (April 2016)
- Cincinnati (April 2016)
- Asheville, NC (May 2016)
- Knoxville, KY (May 2016)
- Tulsa, OK (May 2016)
- Lexington, KY (June 2016)



– Alaska Airlines

- Seattle, Washington (September 2014)
- Los Angeles (September 2015)



Business Update

New and Expanded Domestic Service

– jetBlue

- Fort Lauderdale (November 2015)
- Orlando (November 2015)



– Southwest

- Minneapolis/St. Paul (April 2015)



– Spirit

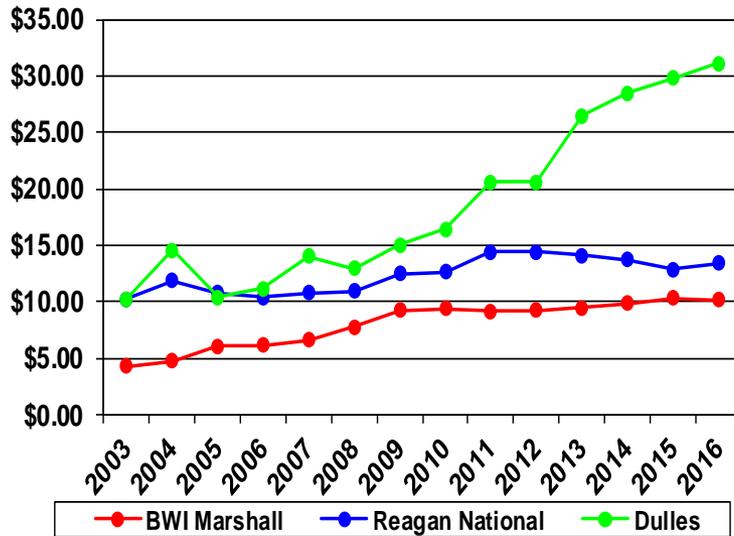
- Houston Intercontinental (March 2015)
- Atlanta (June 2015)
- Los Angeles (July 2015)
- Orlando (January 2016)
- Boston (April 2016)
- Detroit (April 2016)



Business Update

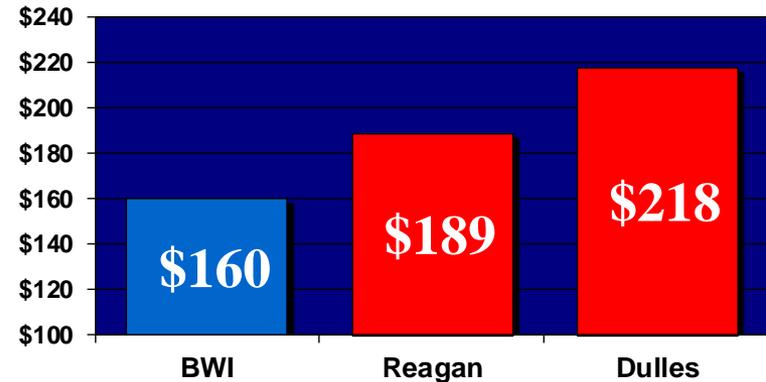
Remaining Competitive

- Cost per Enplaned Passenger
- Average Passenger Airfare



Average Fare at BWI, Reagan and Dulles

12 months ending June 30, 2015



Fares do not include any ancillary revenues such as checked baggage, seat assignment or change fees. BWI's largest carrier, Southwest does not charge any of these fees.

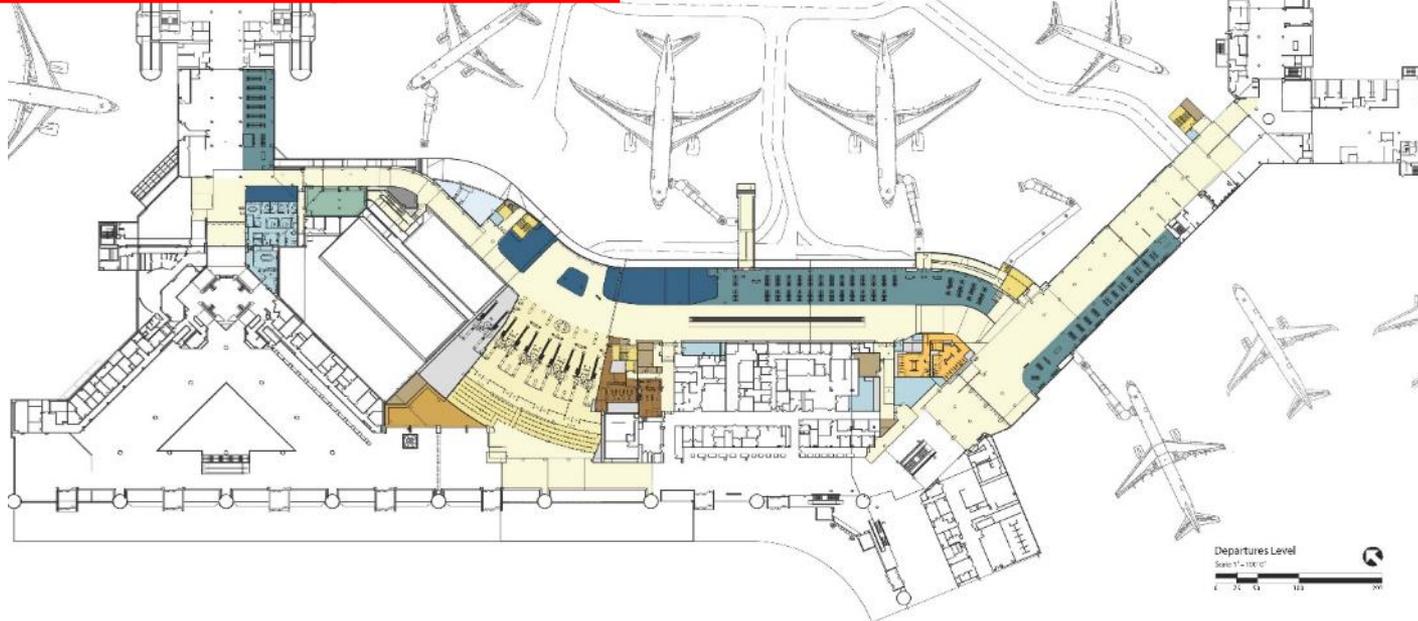
Construction Update

Major Construction Projects

– RSA, Pavement Management & Standards	\$358M	2011 – 2017
– D/E Connector	\$137M	2013 – 2017
– International Concourse Extension	\$118M	2014 – 2018
– International Checked Baggage Inspection System	\$ 22M	2013 – 2017
– Parking Revenue Control System	\$ 10M	2012 – 2016
– Loading Bridge Replacement Program	\$ 12M	2014 – 2017

Construction Update

D/E Connector



Construction Update

D/E Connector

Views Of Existing D Security Checkpoint



Renderings Of New D/E Security Checkpoint



Construction Update

D/E Connector – Current Progress

D/E Security Checkpoint

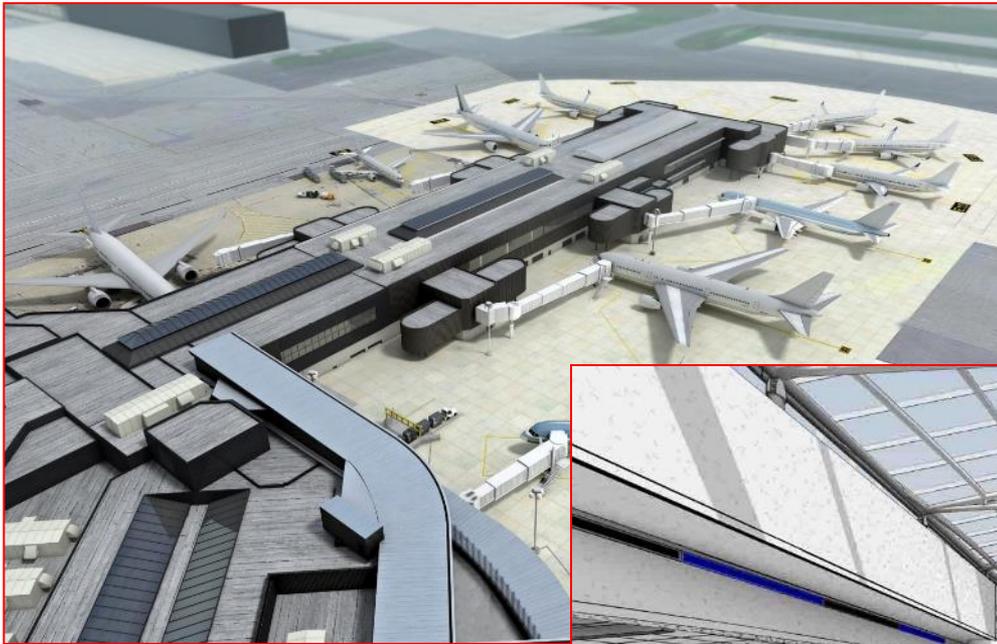


D/E Connector



Construction Update

International Concourse Extension



FY 2016/FY 2017 Outlook

Potential Issues and Opportunities

- **Security Incidents/Changes in Protocols**
- **Federal Funding Uncertainty**
- **Baggage Screening Capacity**
- **Additional Flights at Reagan National Airport**
- **Southwest International Service**
- **Low-Fare International Service**
- **New Airport Hotel**
- **New Air Traffic Control Tower**
- **Rail Station and Service Improvements**
- **Terminal Roadway Congestion**
- **Passport Kioks/Mobile Passport**

Thank You for Your Continuing Support of BWI

