



Tampa International Airport Update



Hillsborough County Aviation Authority
Tampa International, Peter O. Knight,
Plant City and Tampa Executive Airports



Overview of Cargo Operations at TPA

September 16, 2022



Hillsborough County Aviation Authority
Tampa International, Peter O. Knight,
Plant City and Tampa Executive Airports

TPA Cargo Operational Overview

- Belly Cargo
 - Southwest
 - United
 - Lufthansa
 - Delta
 - British Airways
- Amazon
 - ABX Air
 - Air Transport International
 - Atlas Air
 - Sun Country
- FedEx
- UPS



Cargo Volume



5 Year Look Back

- Total freight CY2021: 465.8M lbs.
— Total freight CY2017: 329.9M lbs.

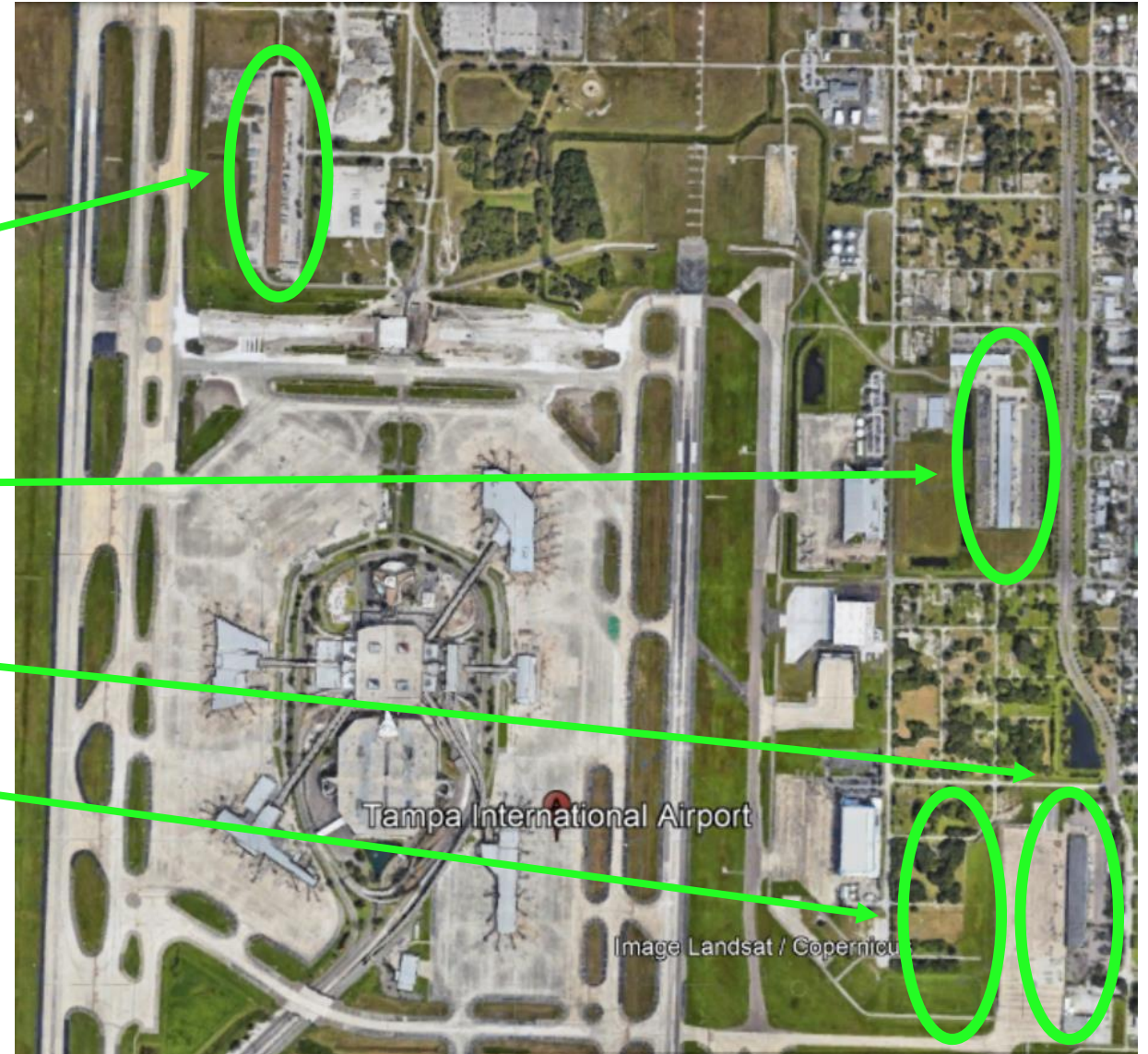


July 2022

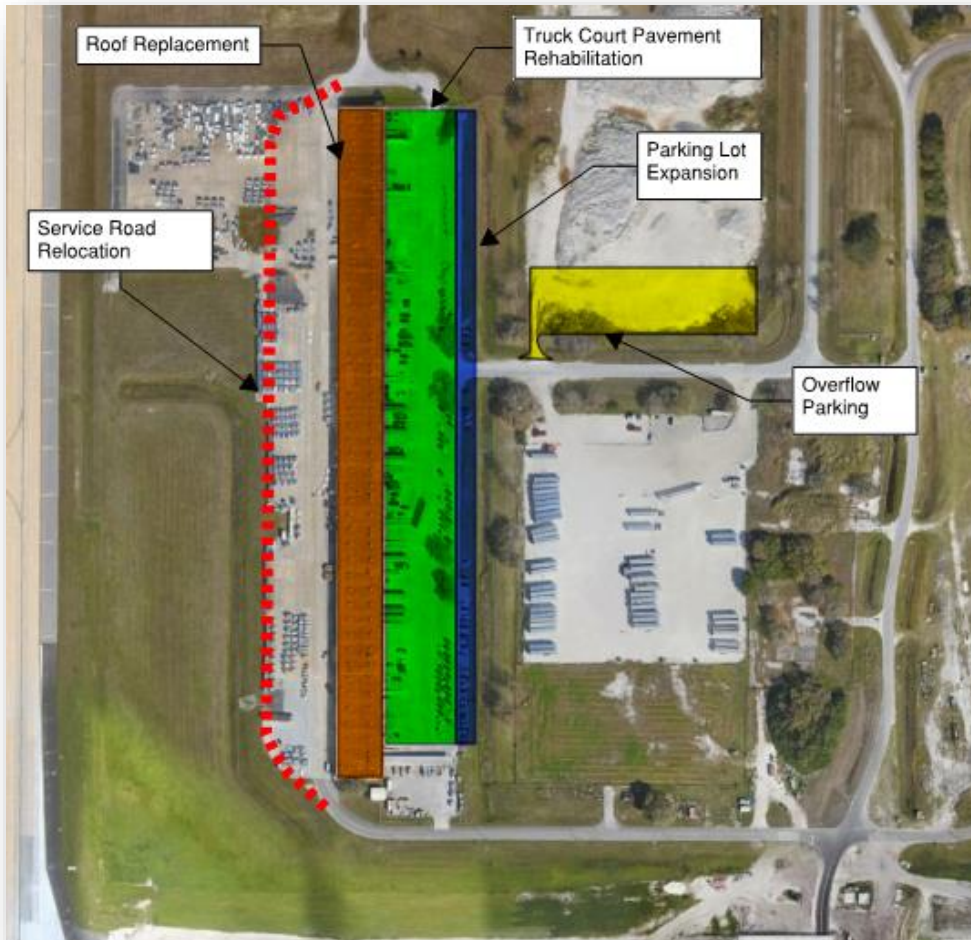
- Total freight up 37% YOY month of July 2022
- Total freight up 11% CYTD July 2022

TPA Cargo Facilities

- North Cargo
- East Cargo
- FedEx
- UPS (in construction)



North Air Cargo Facility Rehabilitation



Two projects:

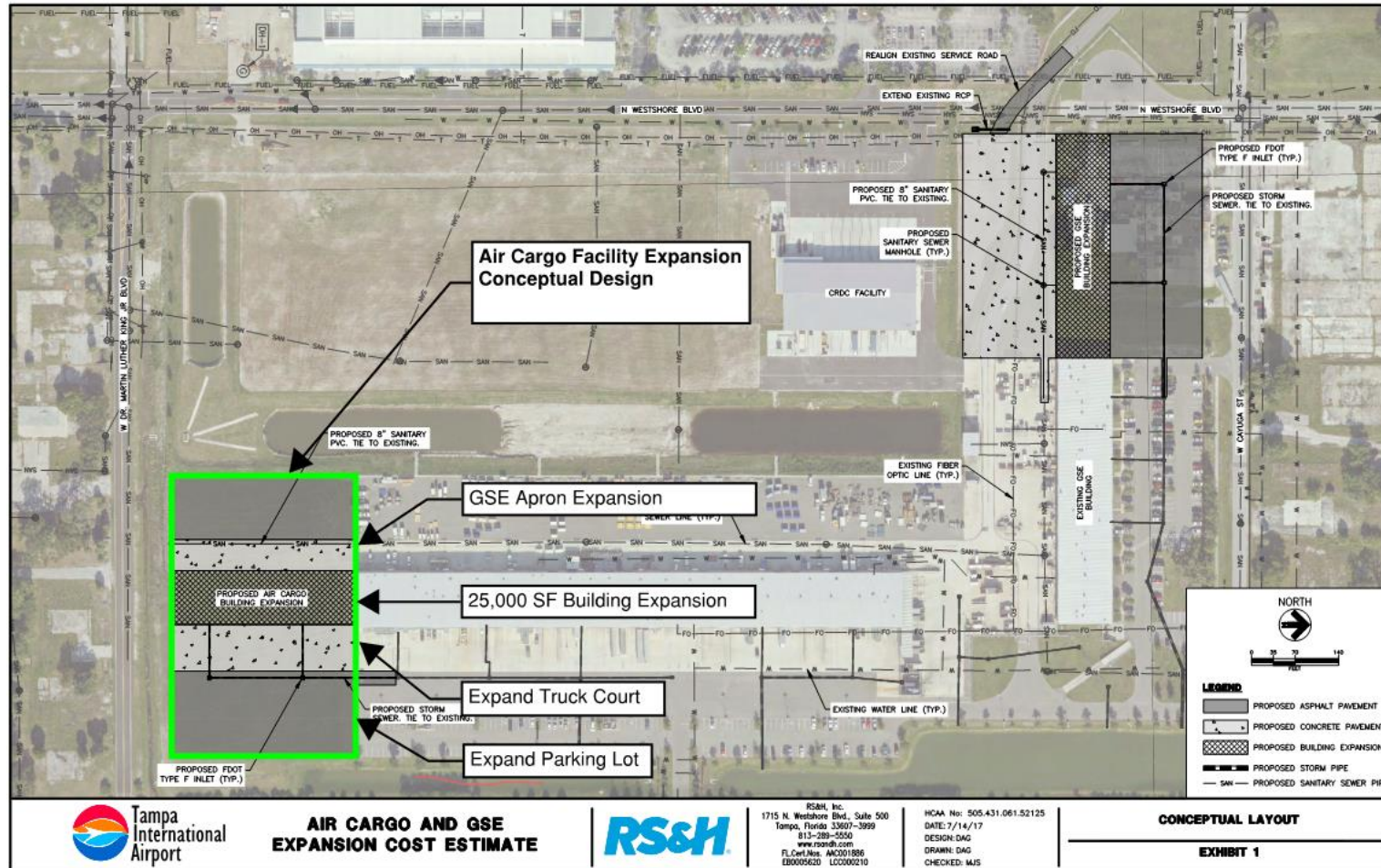
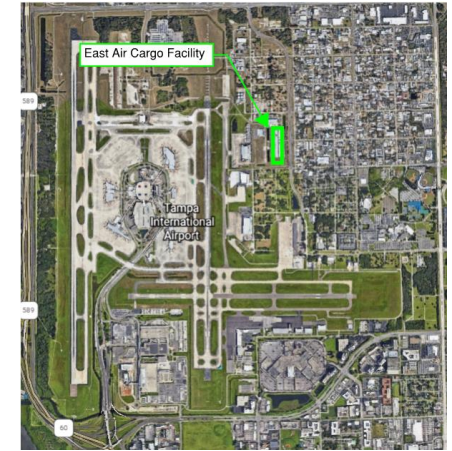
Project 1 – Roof Replacement

Construction March – September 2023

Project 2 – Truck Court Rehab, Parking Expansion and Service Road Relocation

Construction April to September 2023

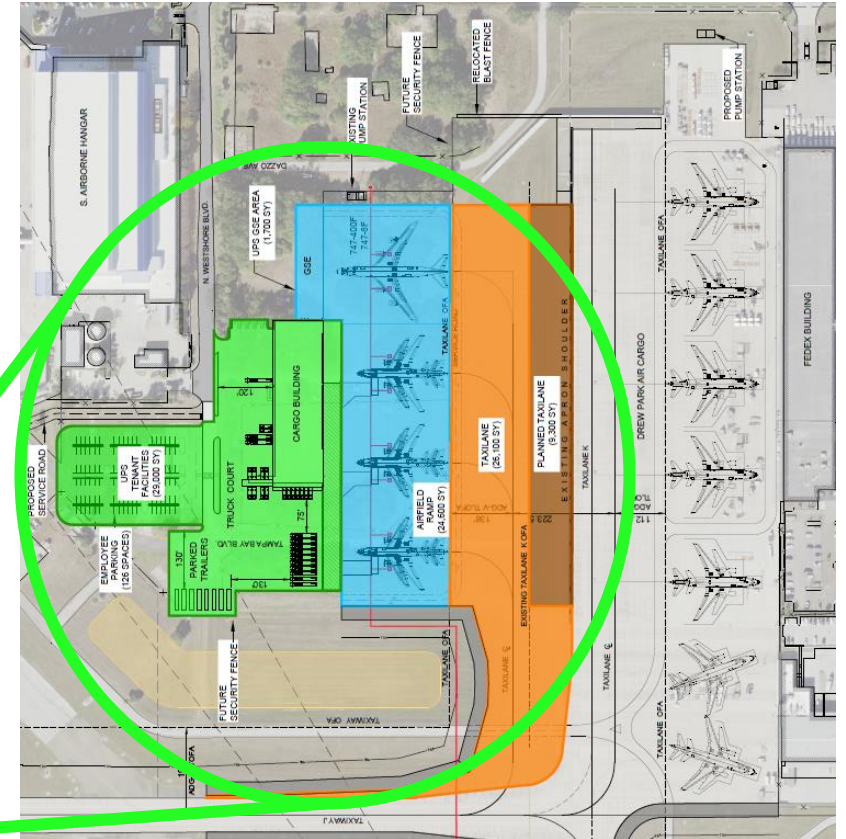
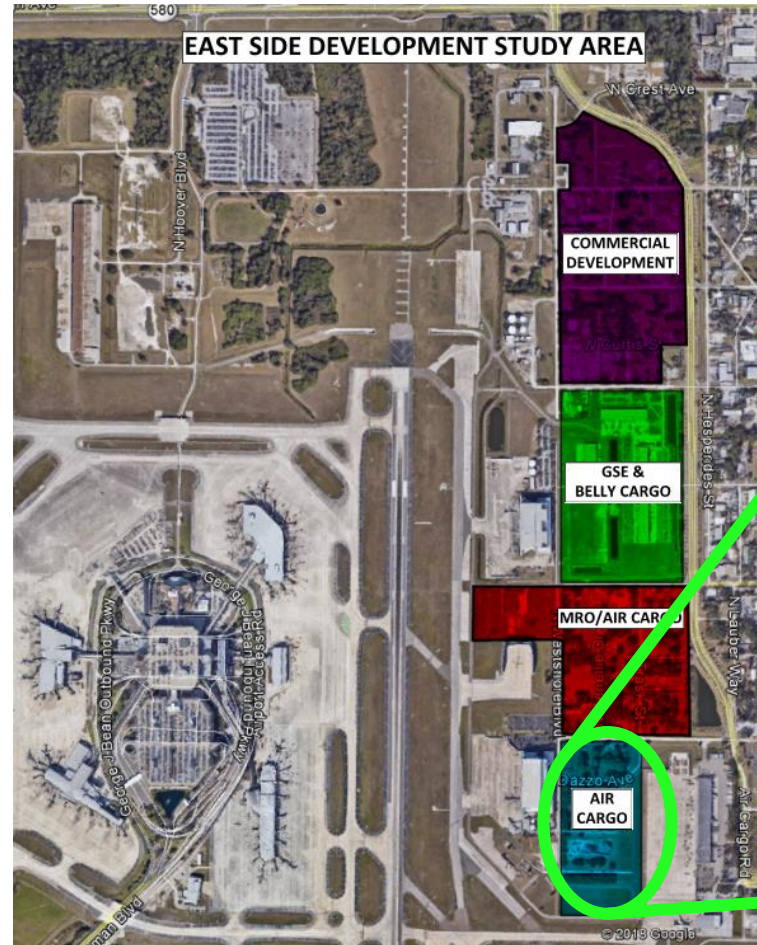
East Air Cargo Facility Expansion



- 25,000 SF Building Expansion
- Expand airside GSE apron
- Expand truck court
- Expand parking lot

New Cargo Facilities in “East Side Development Area”

- TPA’s Master Plan called for cargo development to occur on the East Side of the airfield
- Two potential parcels for cargo development
- One parcel for MRO development





Hillsborough County Aviation Authority
Tampa International, Peter O. Knight,
Plant City and Tampa Executive Airports

Thank you! Welcome to TPA!



Email: Tobrian@TampaAirport.com



TAMPA INTERNATIONAL AIRPORT



Annual Passengers
23,448,336
(Projected for FY23)
Daily Average 64,242

4 Airsides / 58 Gates



23,000
Approx. Parking Spaces



Highest Traffic Month
March
2,252,769

436,618,673
Pounds of Cargo
Calendar Year 2021



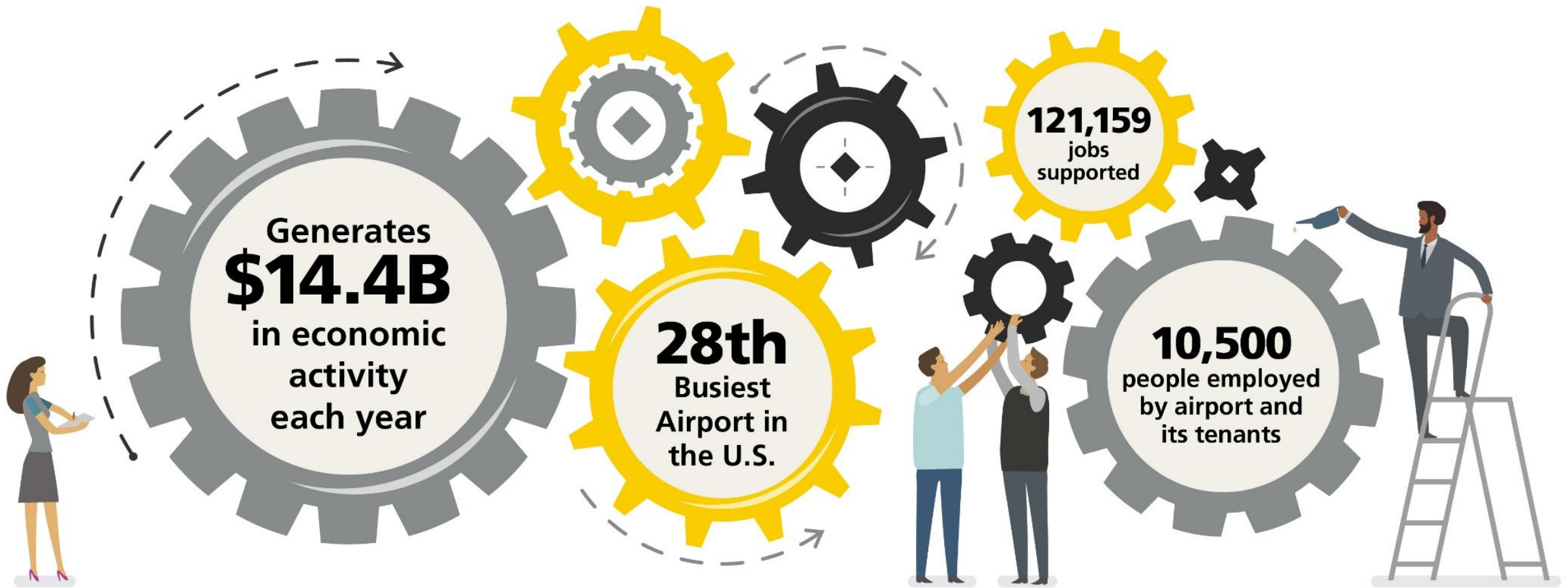
Lowest Traffic Month
September
1,336,353



66
Shops & Restaurants

**3 HCAA General
Aviation Airports**
Peter O. Knight, Plant City,
Tampa Executive





Top 3 Largest Airline Market Share by percentage



544

Daily Flight
Operations



Top 10 Markets for Tampa

1. New York

2. Chicago

3. Detroit

4. Atlanta

5. Philadelphia

6. Denver

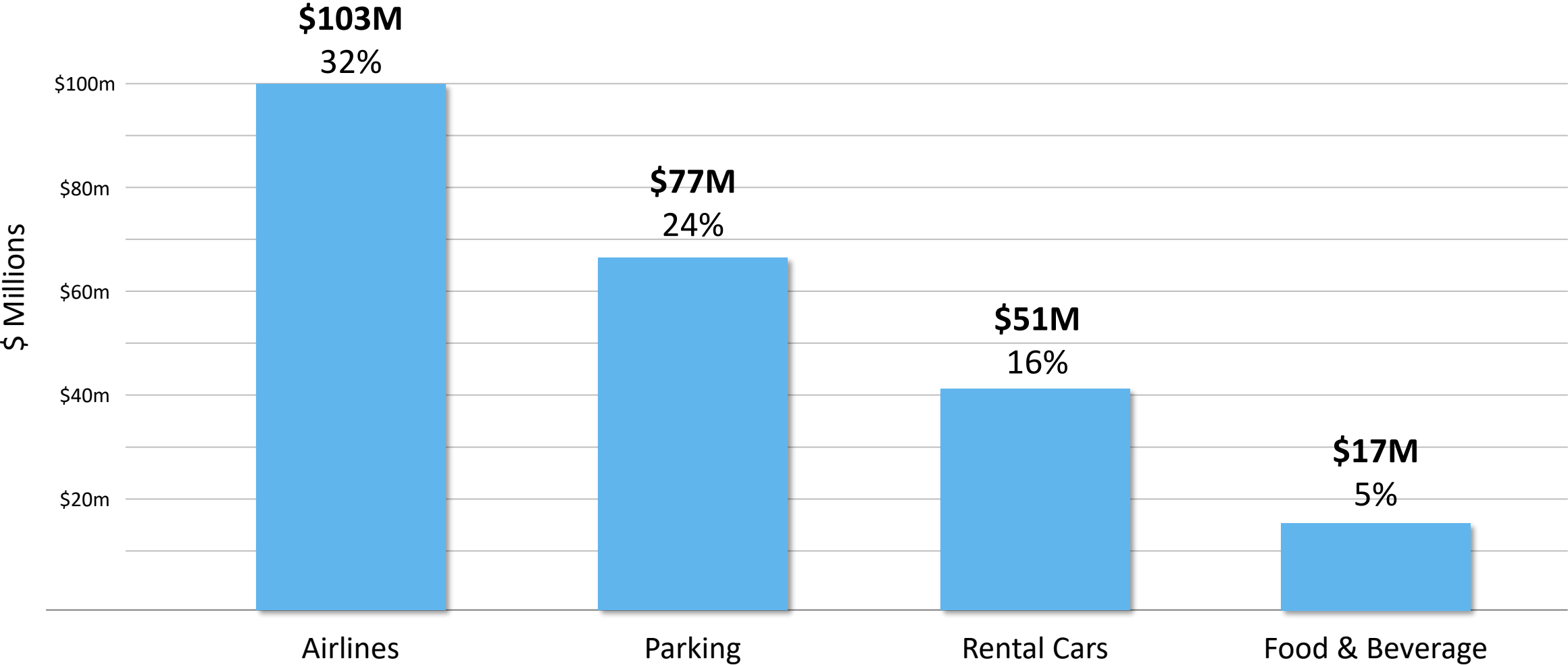
7. Boston

8. Dallas

9. Minneapolis

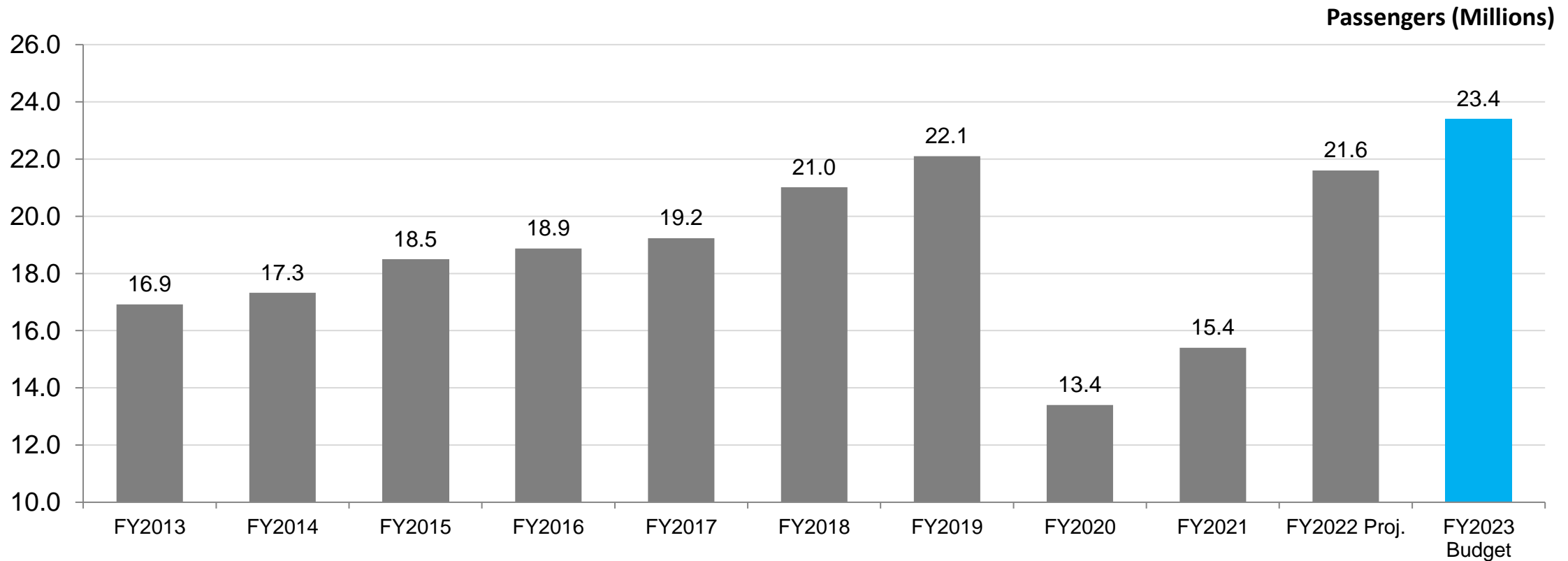
10. Baltimore

FY2022 Top Operating Revenue Sources *(projected)*



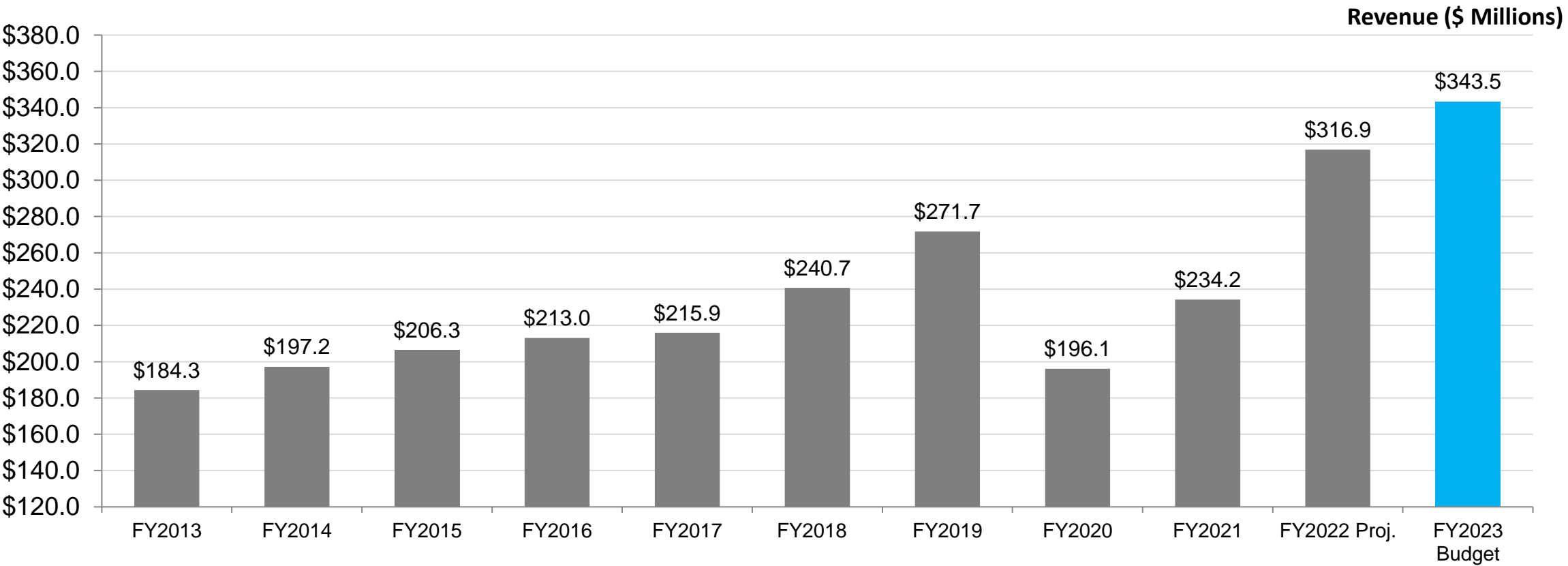
FY2023 Passenger Projection

Tampa International Airport is projected to handle 23,448,336 passengers during FY2023, an 8.7% increase versus FY2022 and 5.2% ahead of FY2019 pre-pandemic levels



FY2023 Operating Revenues

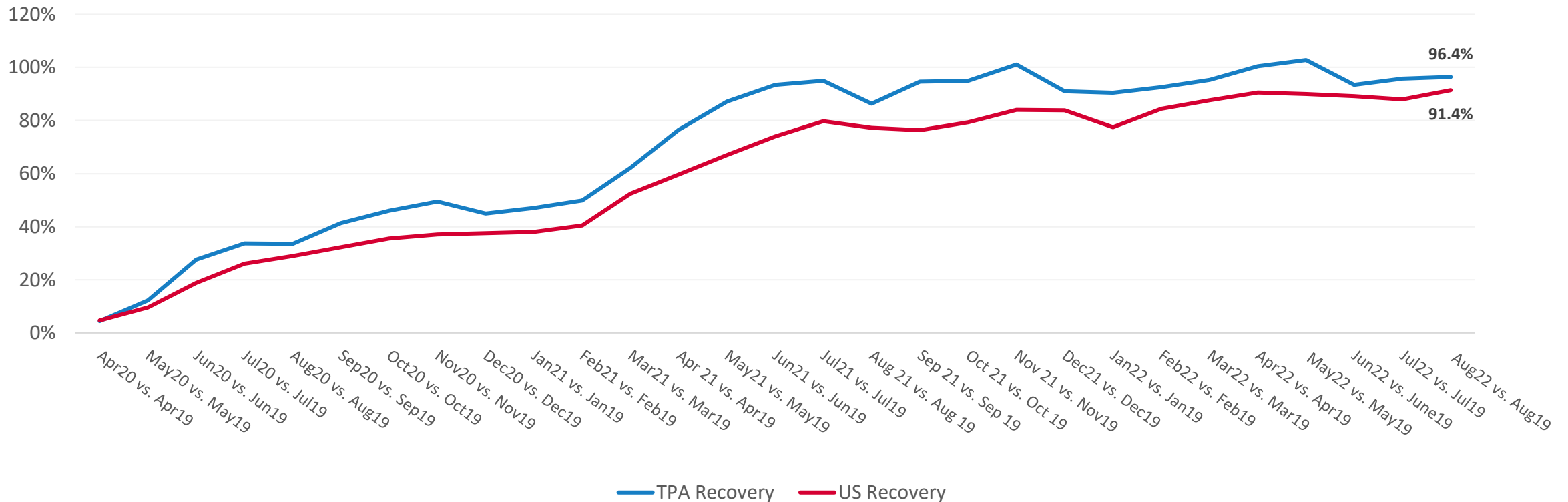
The Authority is projecting record operating revenues totaling \$343.5 million in FY2023, \$26.6 million higher than the FY2022 projection



Market Resilience Update

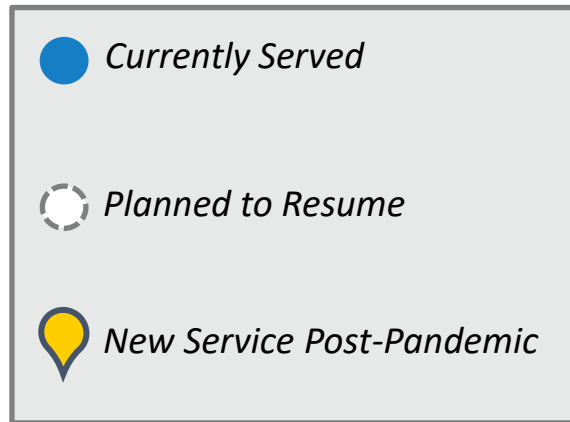
TPA's Passenger Activity Recovering Faster than the U.S. Overall

Monthly Departing Passengers as Percentage of Pre-COVID Activity



Source: TSA Departing Passenger Numbers and TSA Passenger Data

TPA Nonstop Destinations

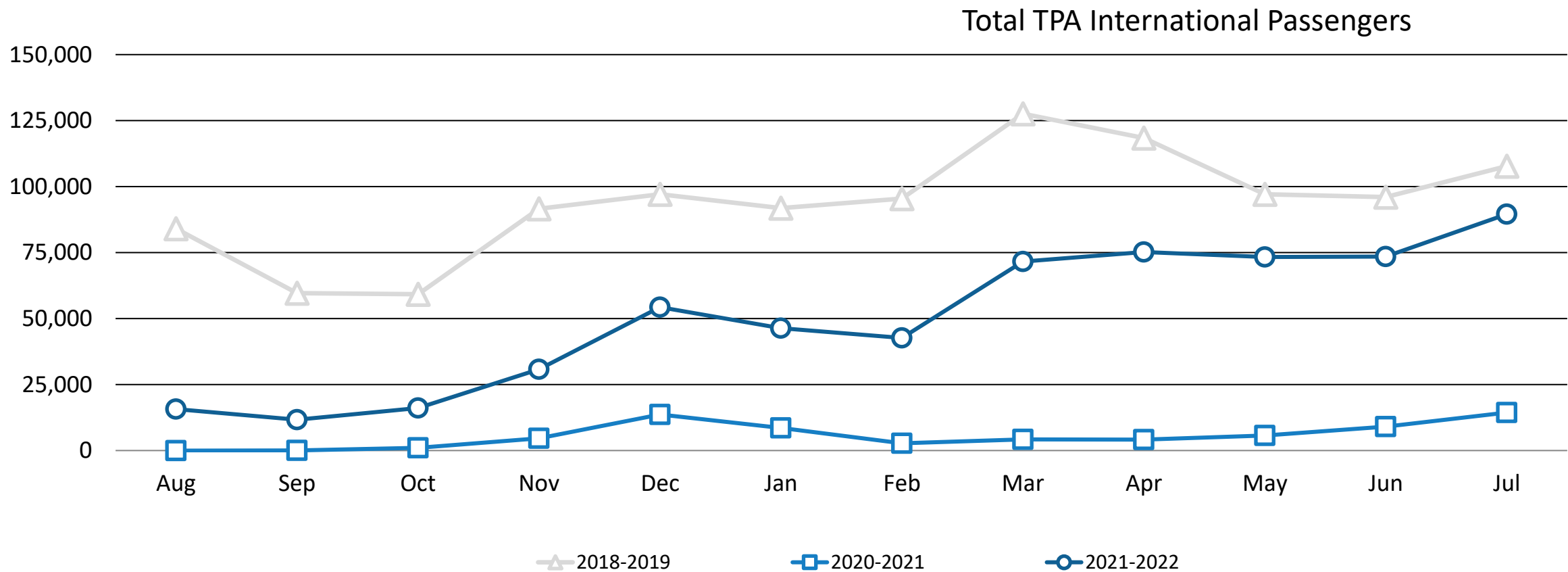


TPA currently serves more points than pre-COVID

Source: Diio Mi Schedule Data September 9, 2022

International Passengers

TPA served 89,549 international passengers in July, -16.9% vs. July 2019 and +521.5% vs. July 2021



New Airlines

2022



2021



TPA Largest Unserved

Domestic		International	
City	2019 PDEW	City	2019 PDEW
SAN	202.9	AMS	51.7
SMF	80.6	CDG	37.4
SNA	66.7	FCO	34.2
SJC	62.5	SJO	31.2
GSO	60.8	DUB	27.7
ABQ	56.3	SDQ	25.9
MSN	46.1	PUJ	25.7
AVL	42.8	MEX	23.3
OAK	42.6		
RNO	40.0		
DSM	39.2		

Source: Diio Mi YE Dec 2019, PDEW= Passengers Daily Each Way





Hillsborough County Aviation Authority
Tampa International, Peter O. Knight,
Plant City and Tampa Executive Airports

Growth & Modernization

MASTER PLAN



Phase 1: Decongestion 2013-2018

Complete

Rental Car Center
Automated People Mover
Main Terminal Expansion &
Concessions Redevelopment



Phase 2: Enabling 2018-2025

Underway

Curbside Expansion
Complete:
SkyCenter Development
Central Utility Plant
Roadway Expansion



Phase 3: Growth Construction 2024-2027

Next

16-gate Airside D

Airside D

EXISTING



PROPOSED



STATUS: Received Board approval in September 2022

BACKGROUND: Airside D was originally scheduled to begin the design phase in 2021; was delayed due to COVID

Timeline revalidated as part of Master Plan Update



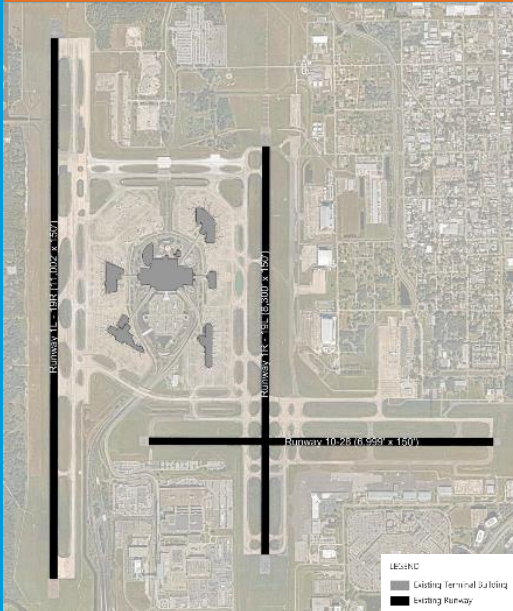
2022 AIRPORT MASTER PLAN UPDATE COMMUNITY OUTREACH

- Required by the FAA and the Florida DOT
- Analyzes TPA's overall capacity, operational and customer needs, as well as emerging industry trends
- Helps the airport anticipate and prepare for future demand, prepare a strategy for cohesive development, maintain long-term financial sustainability and leverage state and federal funding sources
- MPU process spans approximately 24 months
- Visit www.tampaairport.com/2022-master-plan-update



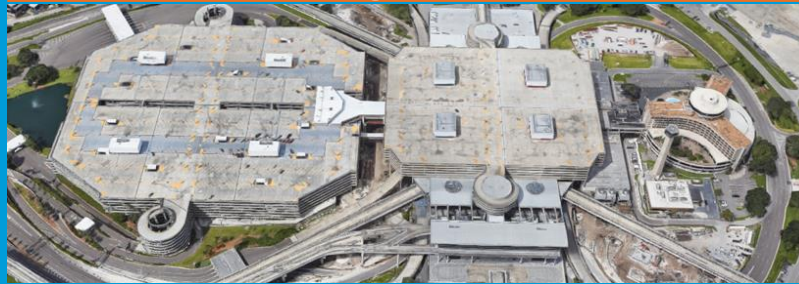
2022 MPU: Airfield and Landside Focus Areas

Assess Airfield Capacity



Establish airfield requirements for the critical aircraft

Assess Future Ground Transportation and Parking Requirements



Develop parking strategies for the existing terminal area that provide sufficient capacity to meet employee and passenger demand levels

Identify Future Access and On-Airport Circulation



Prepare a comprehensive long-term ground transportation plan



2022 MPU: Innovative and Emerging Technologies

AIRFIELD



ELECTRIC VERTICAL TAKE-OFF AND LANDING



ADVANCED AIR MOBILITY

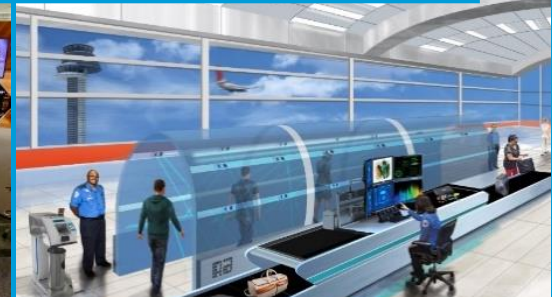
TERMINAL



BIOMETRIC GATE CHECK



SELF-BAG DROP



SECURITY SCREENING CHECKPOINT

LANDSIDE



AUTONOMOUS VEHICLES



ADAPTABLE CURBSIDE OPERATIONS

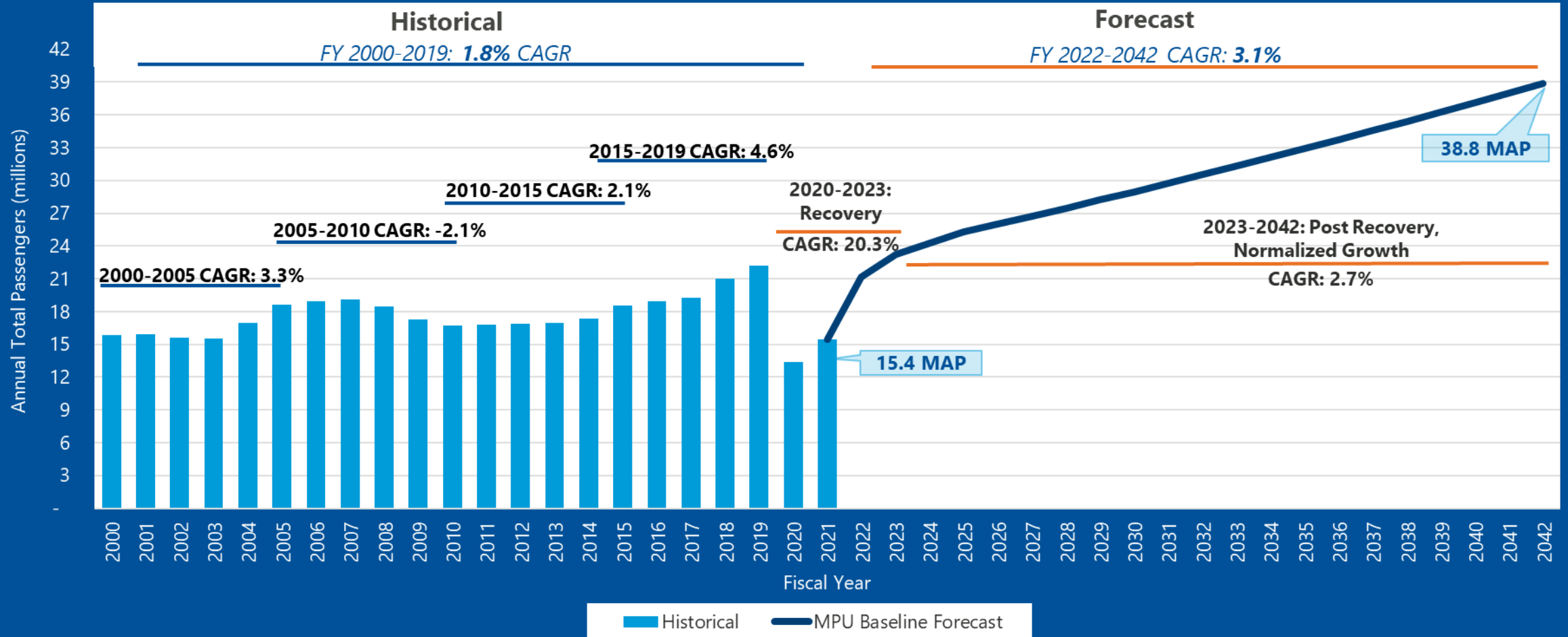


EVOLVING PARKING TECHNOLOGIES





Total Passengers Forecast (in Million Annual Passengers)



Note: CAGR – Compound Annual Growth Rate; MAP – Million Annual Passengers
Tampa International Airport Master Plan Update (MPU)

New! Blue Express Curbsides

- **INNOVATION:** These express curbsides are one-of-a-kind in the U.S.
- For passengers **without** checked luggage
- Pick up and drop off
- Red Express coming in 2025



SkyCenter One | Class A+ Office Tower

- Aviation Authority occupies 3 floors
- Atrium features elevated pedestrian walkway connecting to SkyConnect train at Rental Car Center



Gym



Café



Conference Room



TPA Parking

New Online Booking System

Promotional pricing

Customer upgrades


Faster entrance and exit

Book up to a year in advance

Visit TampaAirport.com to book

Featured Product

P Short Term Garage

 Walk
3 min

- Elevator access to the terminal
- Less than 3 minutes to Terminal
- EV charging stations available

Elevator to Terminal

Drive-up rate
~~\$22.00~~


Price you pay today
\$20.00

Book now & save 9%

Select >

More Info Map

P Long Term Garage

 Walk
5 mins

- Quick walk, great price
- Direct covered access to the Terminal
- Covered parking (floors 1-7)

Walk to Terminal

Drive-up rate
~~\$18.00~~


Price you pay today
\$16.00

Book now & save 11%

Select >

More Info Map

P Economy Garage

 SkyConnect
12 mins

- Short ride, big savings!
- On airport property
- SkyConnect train to Terminal

1.4-mile train to Terminal

Drive-up rate
~~\$10.00~~

Price you pay today
\$8.00


Book now & save 20%

Select >


More Info Map

BOOK. PARK. SAVE.

Book TPA parking online
and **save up to 17% a day!**



Book now >



Discount subject to change in future.

Technology: Mobile Ordering and Delivery Options

- Food delivery from airport restaurants
- Touchless Technology
- Faster Service
- Pick-up available at no additional charge
- Download the GRAB app or visit TPAtoGo.com

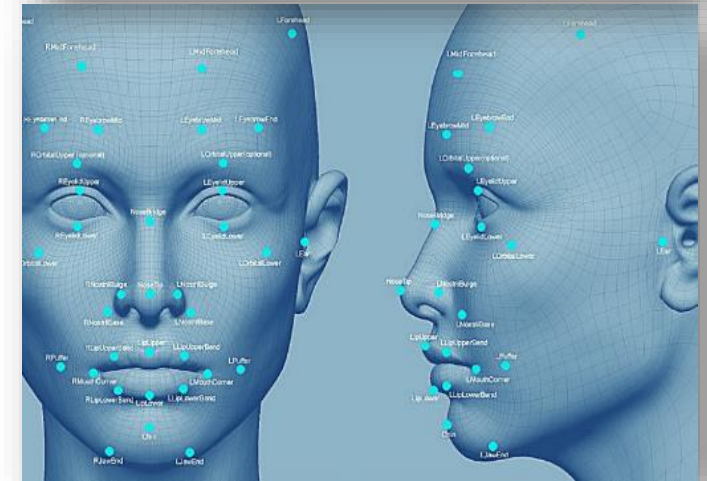


Biometric Screening Technology at TPA

- NEW: Exit biometric scanners installed at international gates
- Airlines using them in the boarding process: Southwest, Cayman Airways, Eurowings Discover, WestJet and Air Canada.
- **Exit** and **Entry** biometrics is a Congressionally mandated initiative and an outcome of the 9/11 Commission:
 - **Entry** Biometrics (Simplified Arrival) was implemented at TPA in March 2021
- **BENEFITS:** Improve efficiency, safety, and convenience during the boarding and arrivals process

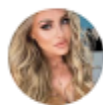
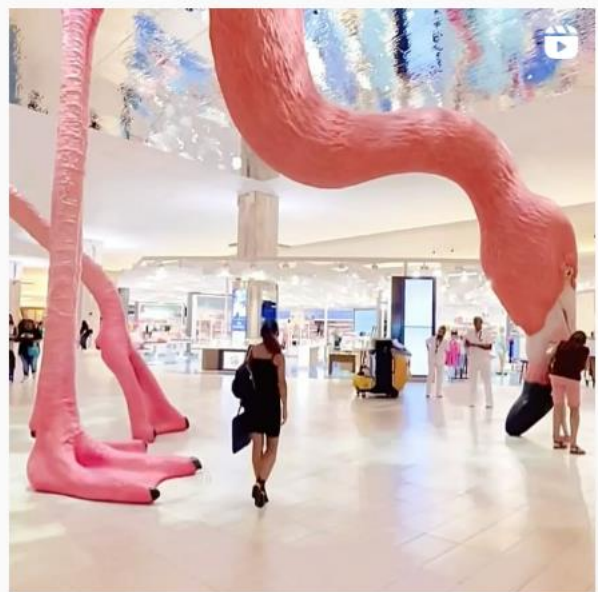


U.S. Customs and
Border Protection





Diana Zuniga @dianawhn · 22h
My baby is happy to be home.. 🥰🌴🌴 @FlyTPA



danette_and I saw it the other day! It's spectacular 🦩

1h Reply



Maria Helena Carneiro



Andrew Harlan @HarlanYoungII · 1h

Kneel before the flamingo @FlyTPA



Tampa International Airport ✈️
@FlyTPA



Due to foreseen circumstances well within our control, we will continue posting about our giant pink flamingo 🦩

8:46 AM · Aug 4, 2022 · Twitter for iPhone



City of Tampa @CityofTampa · Aug 29
Always tickled pink to see this beauty at @flytpa! 🦩



kayla @kaylaindunedin · Aug 28

Got to see the flamingo @FlyTPA today! 🦩



Tamara Lush @TamaraLush · Aug 28

Replying to @ndahlberg and @FlyTPA

The flamingo is the best

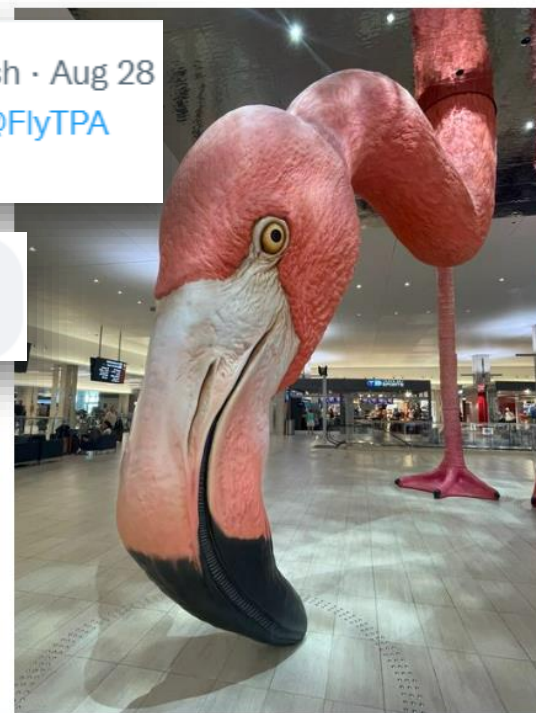
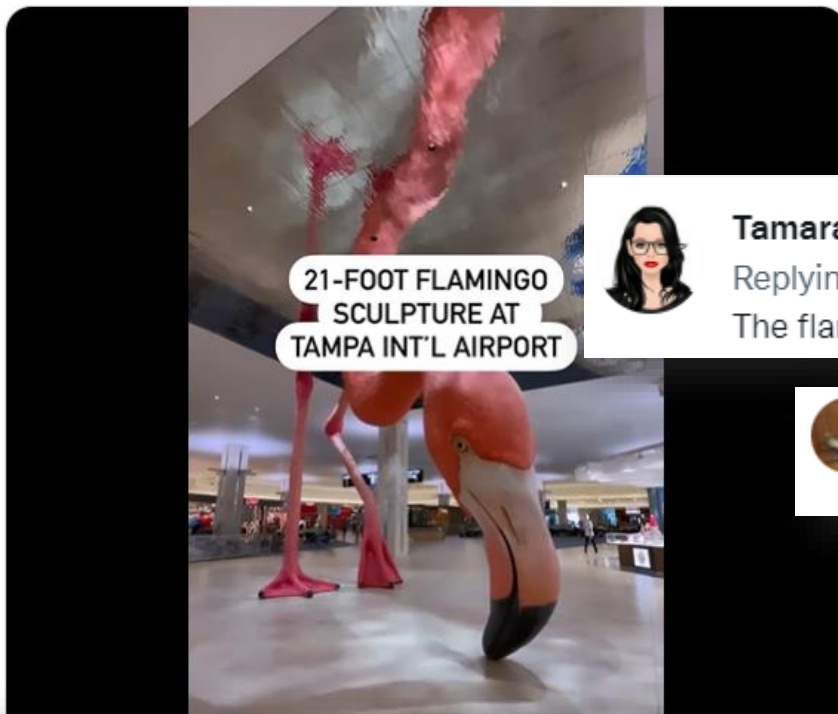


Noah Buckwalter
So majestic



Dan Noah

Beautiful. The perfect art to welcome people to Tampa





Thank you



Hillsborough County Aviation Authority
Tampa International, Peter O. Knight,
Plant City and Tampa Executive Airports