



Tampa International Airport Update

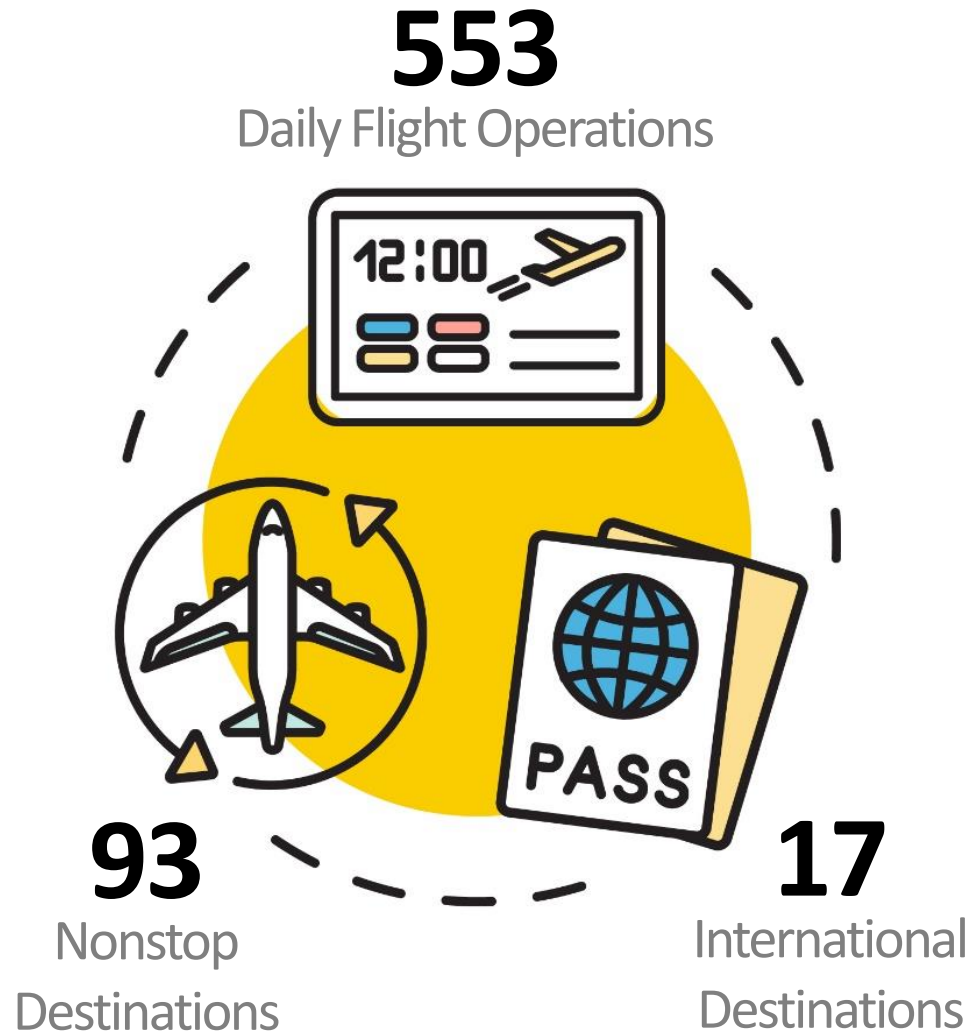
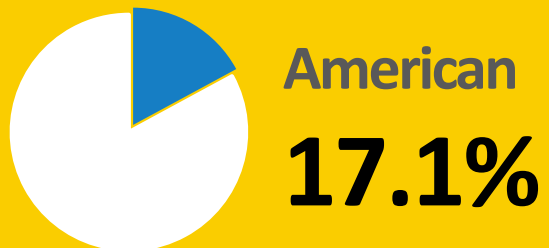
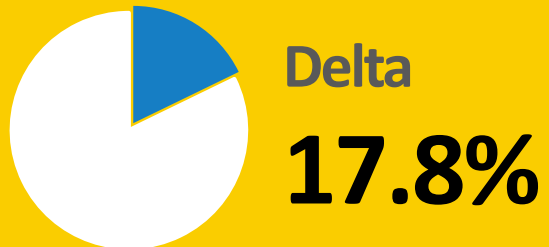
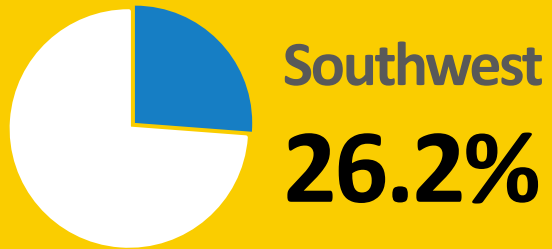
Westshore Alliance Development Forum

May 18, 2023



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

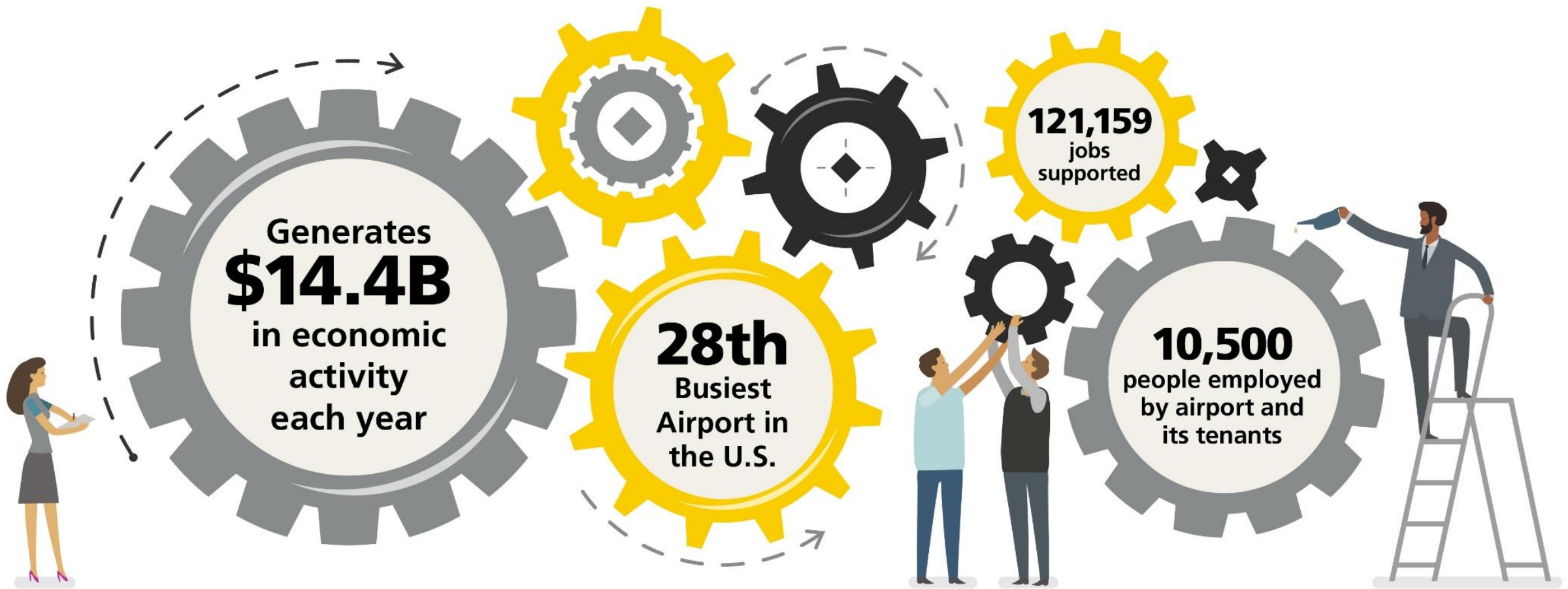
Top 3 Largest Airline Market Share by percentage



Top 10 Markets for Tampa

1. New York
2. Chicago
3. Atlanta
4. Boston
5. Philadelphia
6. Detroit
7. Dallas
8. Denver
9. Washington, D.C.
10. Minneapolis

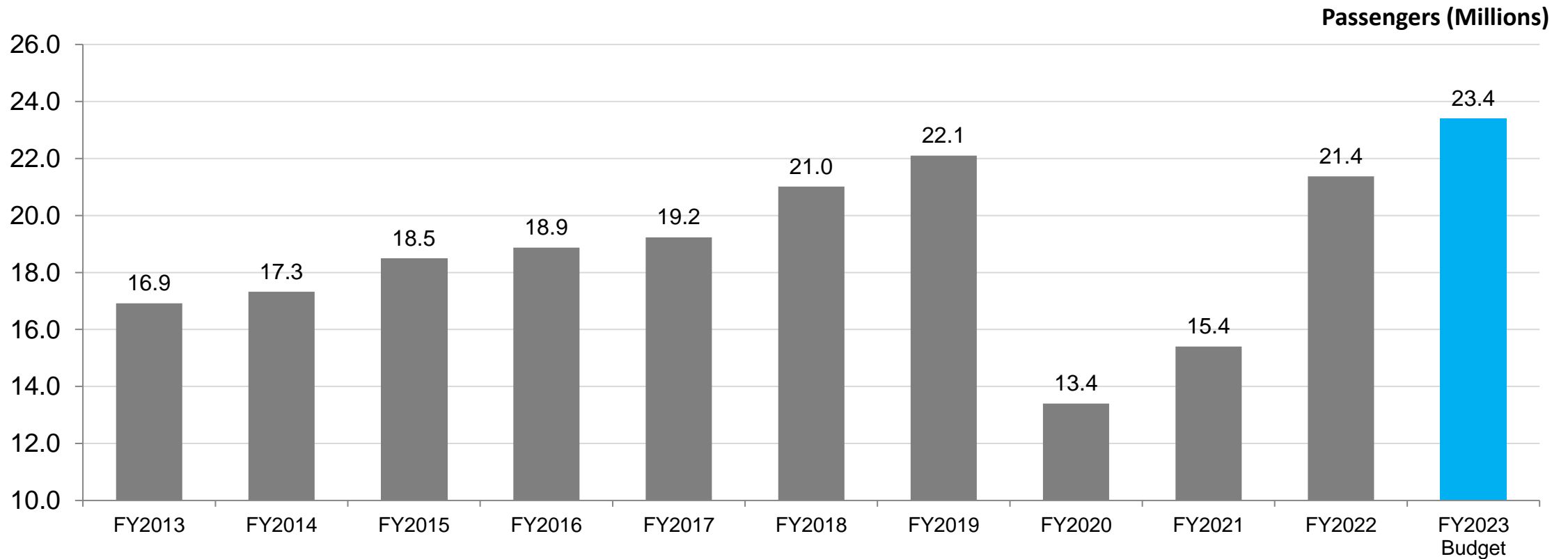
Calendar Year 2022



Source: FDOT Aviation Economic Impact Study 2019

FY2023 Passenger Projection

Tampa International Airport is projected to handle 23,448,336 passengers during FY2023, an 9.7% increase versus FY2022



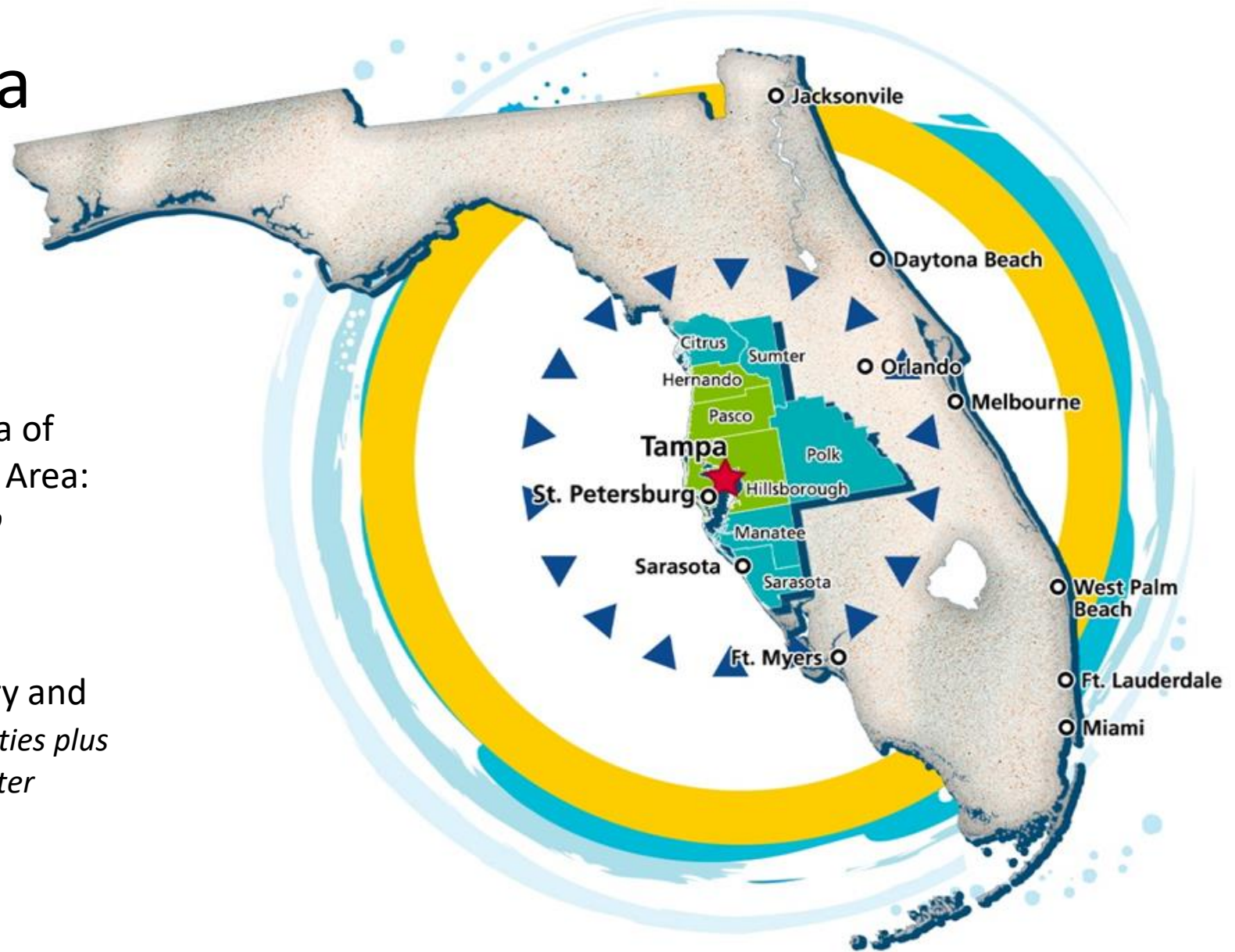
TPA's Catchment Area

3.3 million

in 4-county primary catchment area of
Tampa Bay Metropolitan Statistical Area:
Hillsborough, Pinellas, Hernando & Pasco

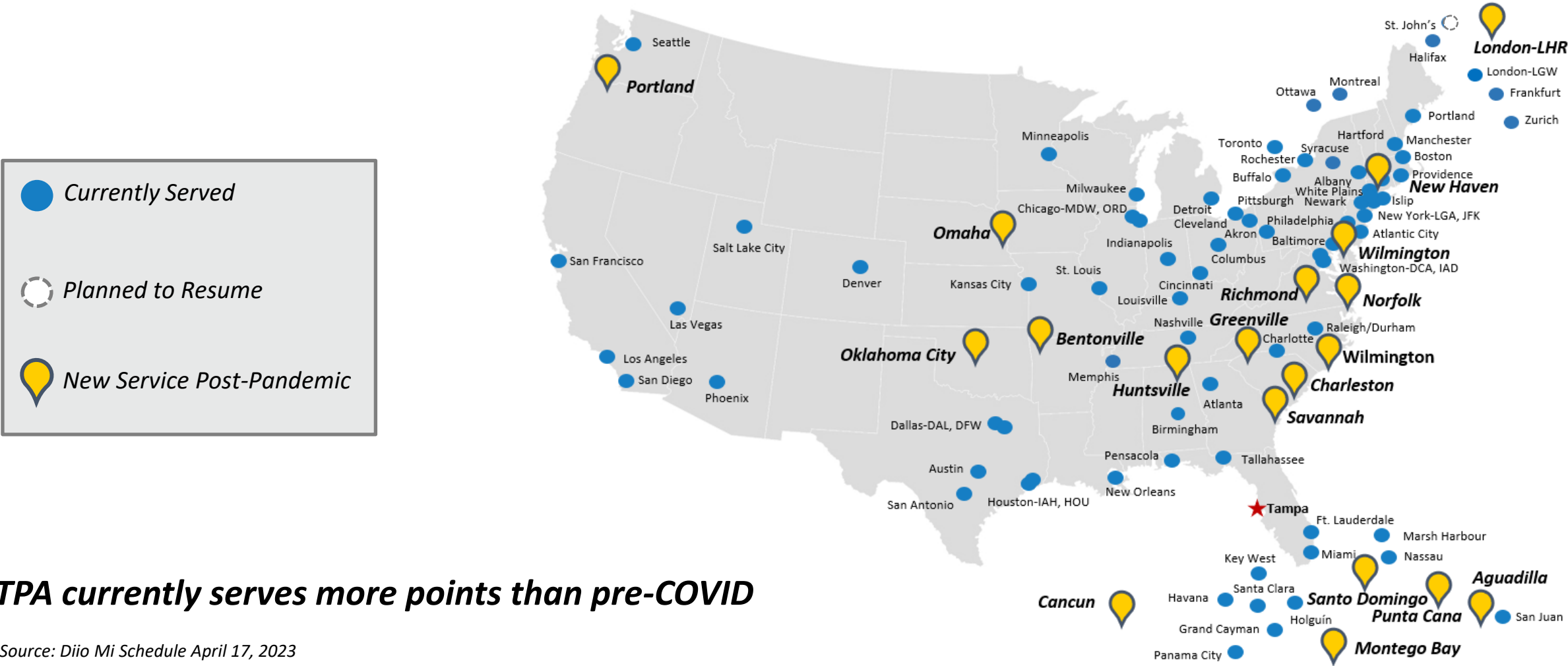
5.2 million

in 9-county area comprising primary and
secondary catchments: *Primary counties plus
Citrus, Manatee, Sarasota, Polk and Sumter*



Source: ESRI Business Analyst – 2022 Total Population

TPA Nonstop Destinations



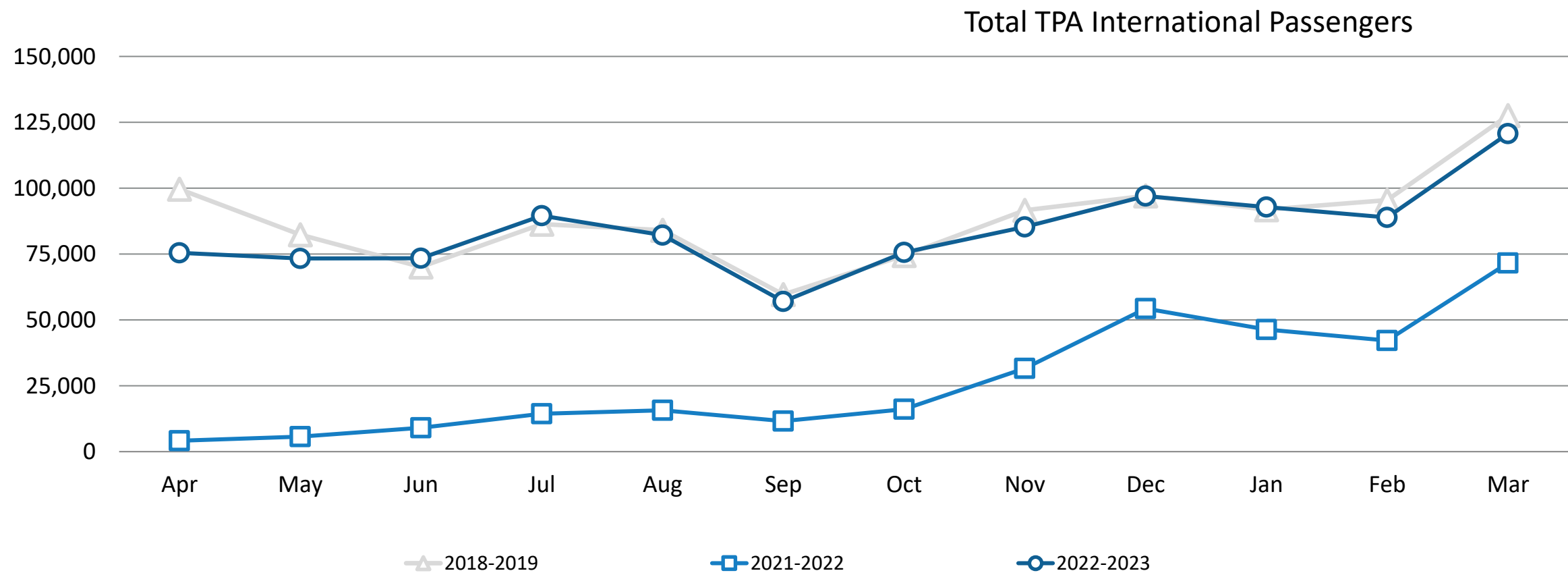
TPA currently serves more points than pre-COVID

Source: Diio Mi Schedule April 17, 2023



International Passengers

TPA served 120,761 international passengers in March 2023, -5.4% vs. March 2019 and +68.5% vs. March 2022



London Heathrow – Tampa Bay Economic Impact

\$247M in estimated annual economic output for a daily Virgin Atlantic service



	Annual Impact
Inbound Visitors	58,751
Employment	2,339
Payroll	\$83.2M
Tax Revenues	\$39.2M
Economic Output	\$246.9M

Source: Economic Impact Study for Tampa International Airport by Crawford, Murphy & Tilly, Inc. – 2023

Air Service: Pitching TPA and Tampa Bay

October 2022 | Las Vegas

37 Airline Meetings Held



TPA Largest Unserved

Domestic	
City	PDEW
SMF	79.2
SNA	67.7
SJC	62.1
GSO	60.0
ABQ	56.8
MSN	46.0
AVL	41.6
OAK	41.4
DSM	38.7
RNO	38.7
BTV	35.1

International	
City	PDEW
AMS	53.4
CDG	36.1
FCO	32.4
SJO	30.1
DUB	24.6
MEX	22.2
BCN	21.3
SJD	18.9



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



Growth & Modernization

Master Plan Update Goals



Formulate 20-year forecasts
for the Airport



Revalidate Airside D plan and
assess timing for the initial buildout
of the North Terminal



Identify newer or emerging
trends and technologies



Validate the Terminal, roadway
and curbside capabilities to serve
34-million annual passengers



Assess TPA's existing
airfield capacity

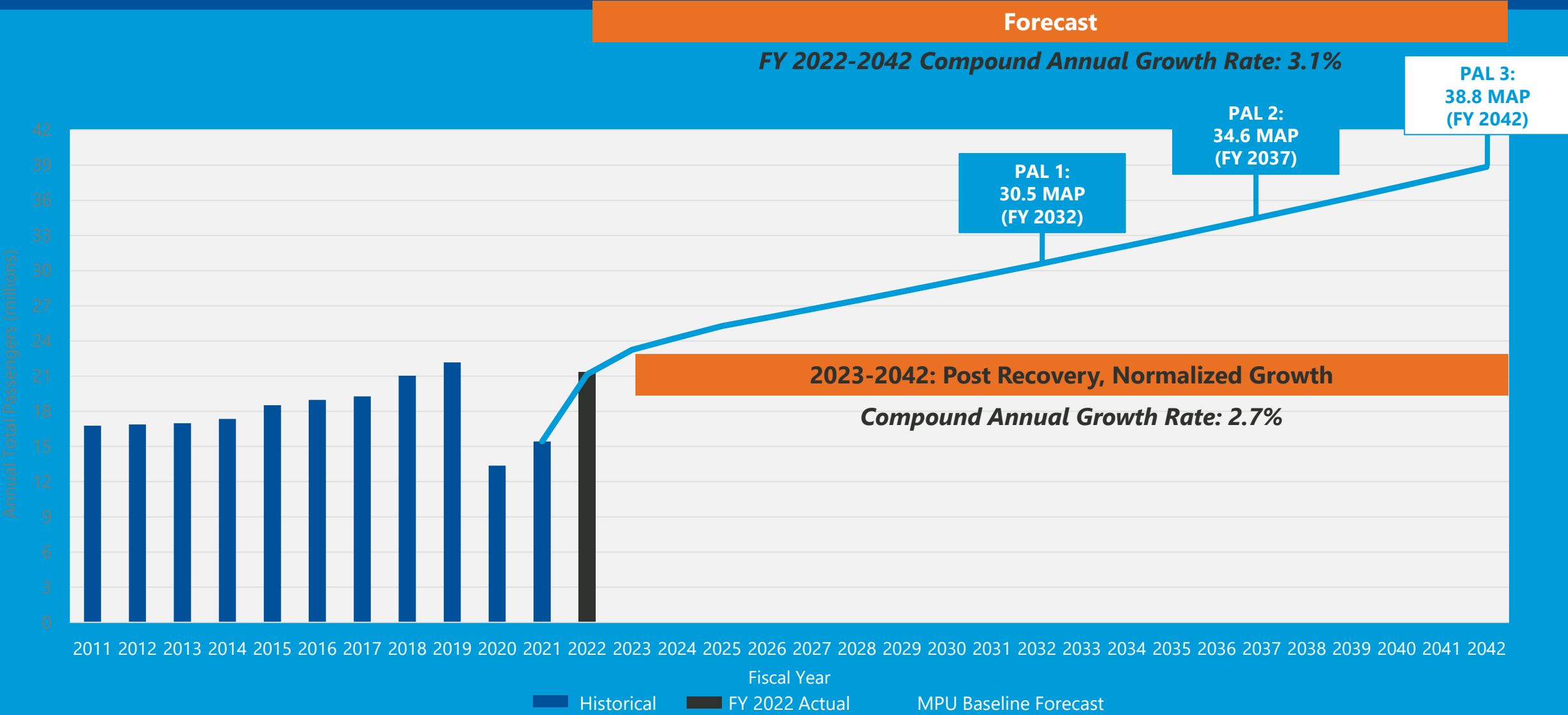


Assess needs and
opportunities for additional
capacity enhancements

In-Progress



Master Plan Update Planning Activity Levels (PALs)



Airside D

EXISTING



PROPOSED



STATUS: Received Board approval in September 2022; Construction begins in 2024. Expected completion in 2027.

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

Airside D Look Ahead

- May 2023: Board selected Design Builder- Hensel Phelps
- August 2023:
 - Board award Part 1 Design Contract
 - Start design
- Late 2024: Start enabling work construction
- Late 2027: Complete construction
- Early 2028: Complete move-in and airline relocations



HILLSBOROUGH COUNTY
AVIATION AUTHORITY

REQUEST FOR QUALIFICATIONS
FOR
AIRSIDE D DEVELOPMENT PROGRAM
AT
TAMPA INTERNATIONAL AIRPORT
TAMPA, FLORIDA

PROJECT NO. 8500 23

ISSUE DATE: OCTOBER 12, 2022



Accolades





Tampa International Airport Update

Westshore Alliance Development Forum

May 18, 2023



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