

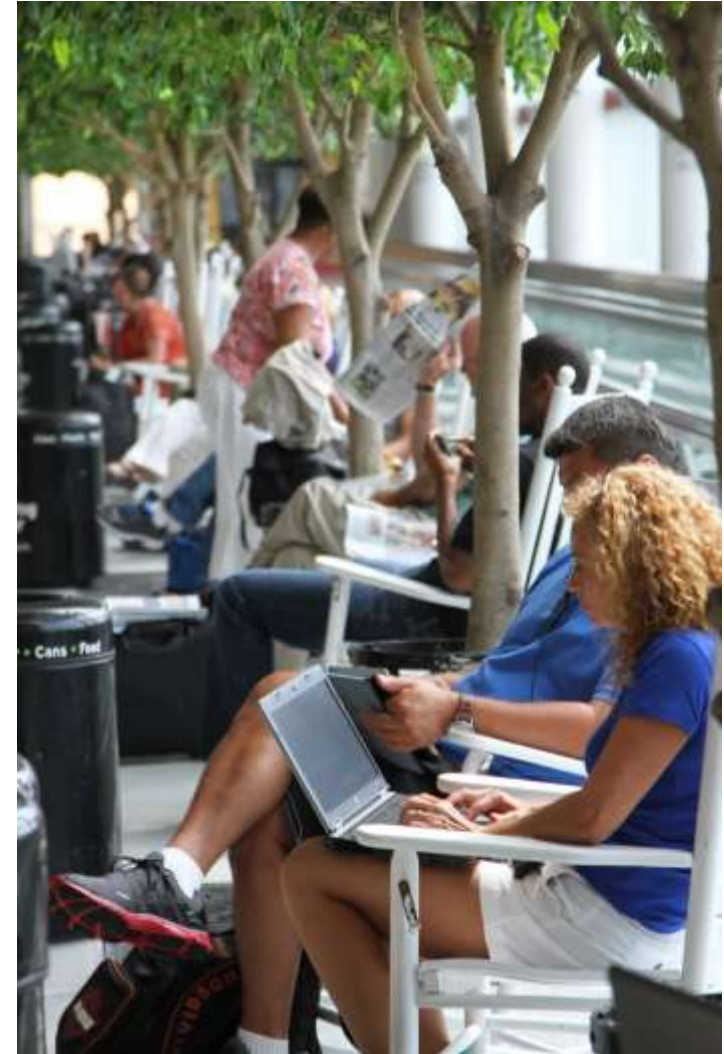
Charlotte Douglas International Airport

Airport Update



Charlotte-Douglas
INTERNATIONAL AIRPORT

- < \$10B annual economic impact
- 20,000 daily employees (10,000 AA)
- 700 average daily departures
- 545,178 aircraft operations in 2014
- 44,279,504 passengers in 2014; 2% increase
 - 120,000 passengers daily
- Nationwide Rankings 2014:
 - 6th in Movements/Operations
 - 8th in Passengers



Air Service



Charlotte-Douglas
INTERNATIONAL AIRPORT

- 154 nonstop destinations; 31 international
- Served by 8 major airlines; 3 foreign flag carriers
- Growth is projected to continue over next 10 years
- 75-80% of total passenger traffic is connecting traffic; 92% of passengers are AA customers



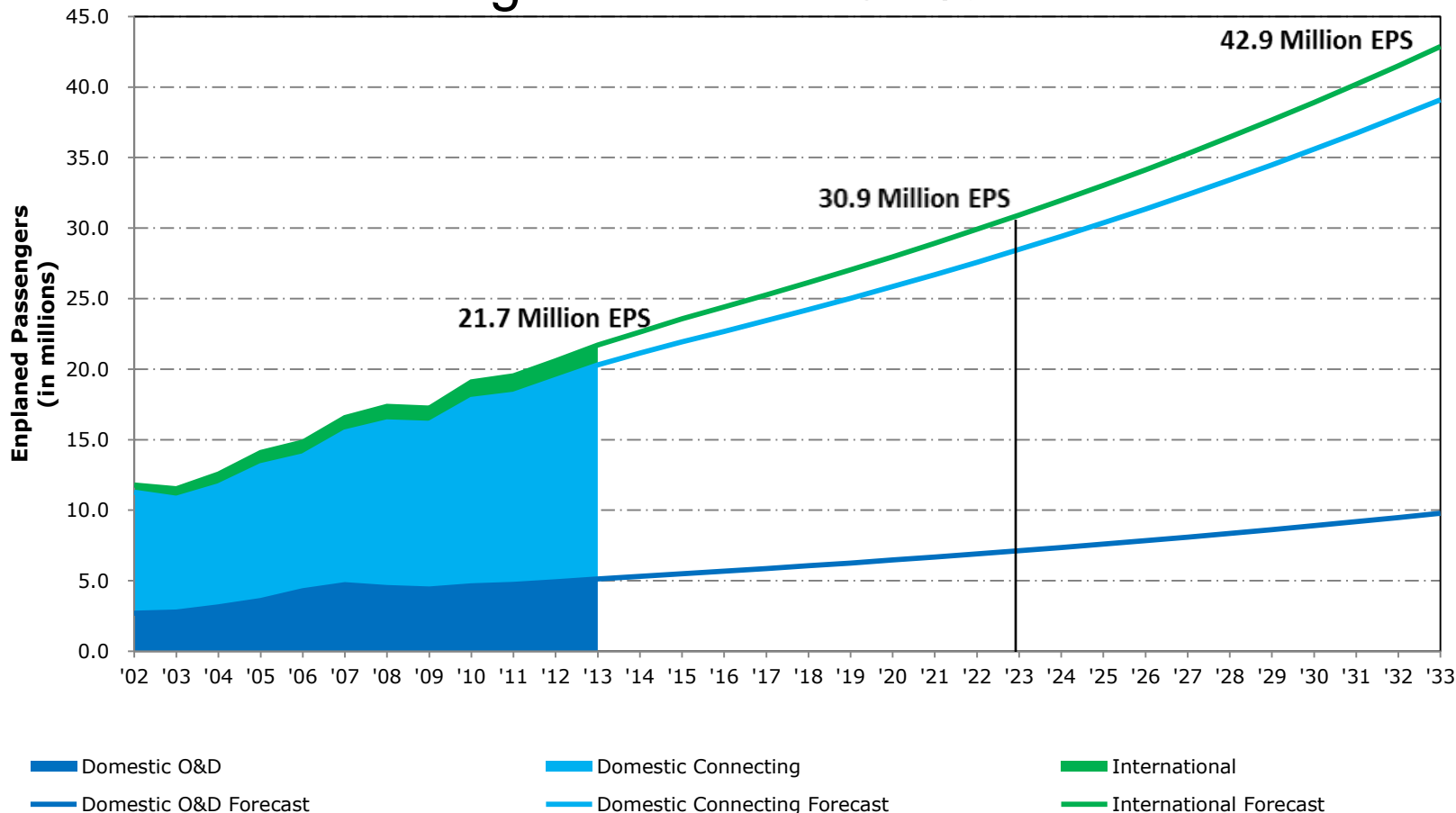


Forecast of Aviation Demand

Annual Enplanements Forecast



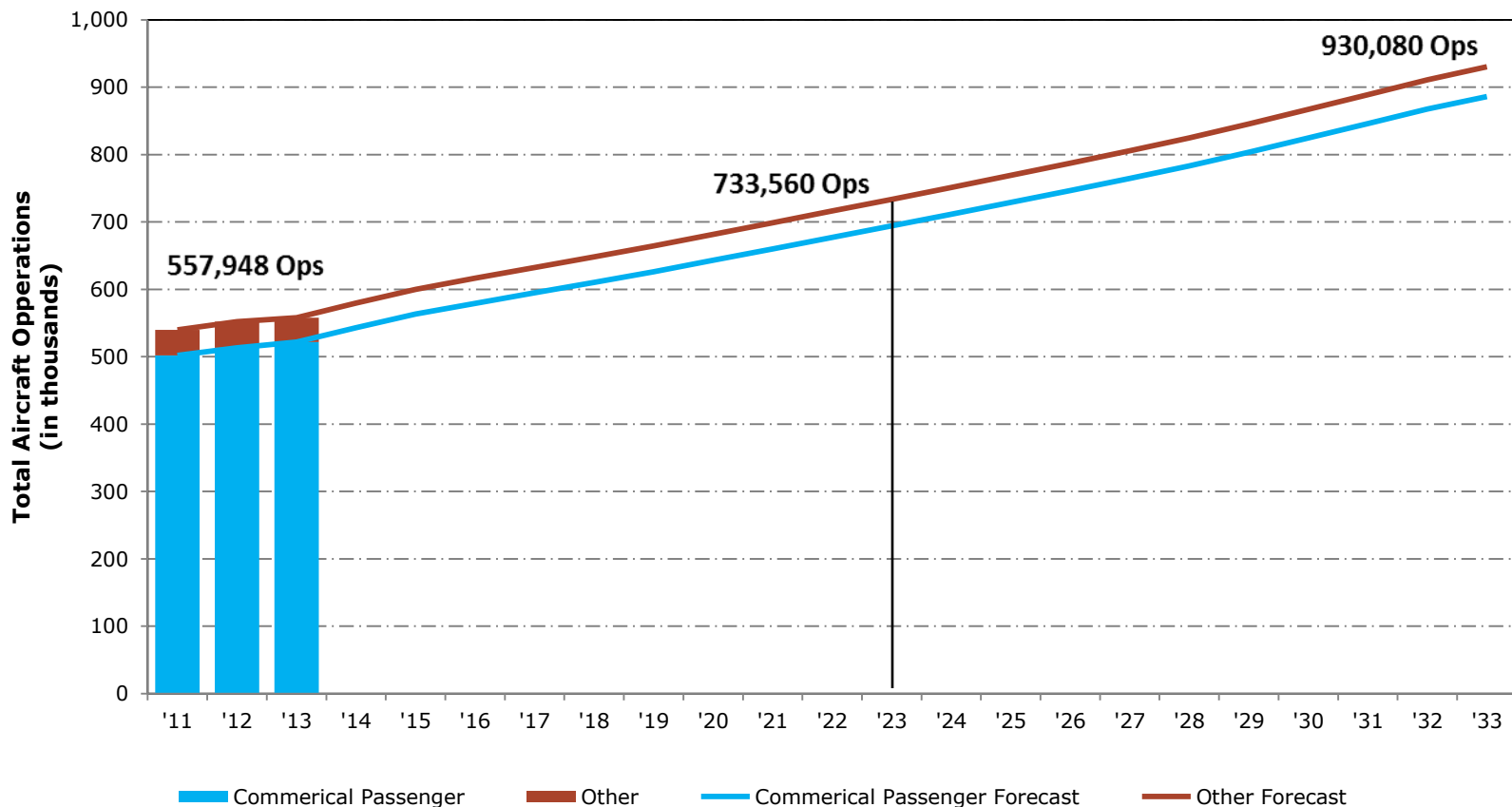
- Enplanements forecast growth rate is 3.5% annually:
- Domestic O&D annual growth rate is 3.3%
- International annual growth rate is 5.1%



Annual Operations Forecast



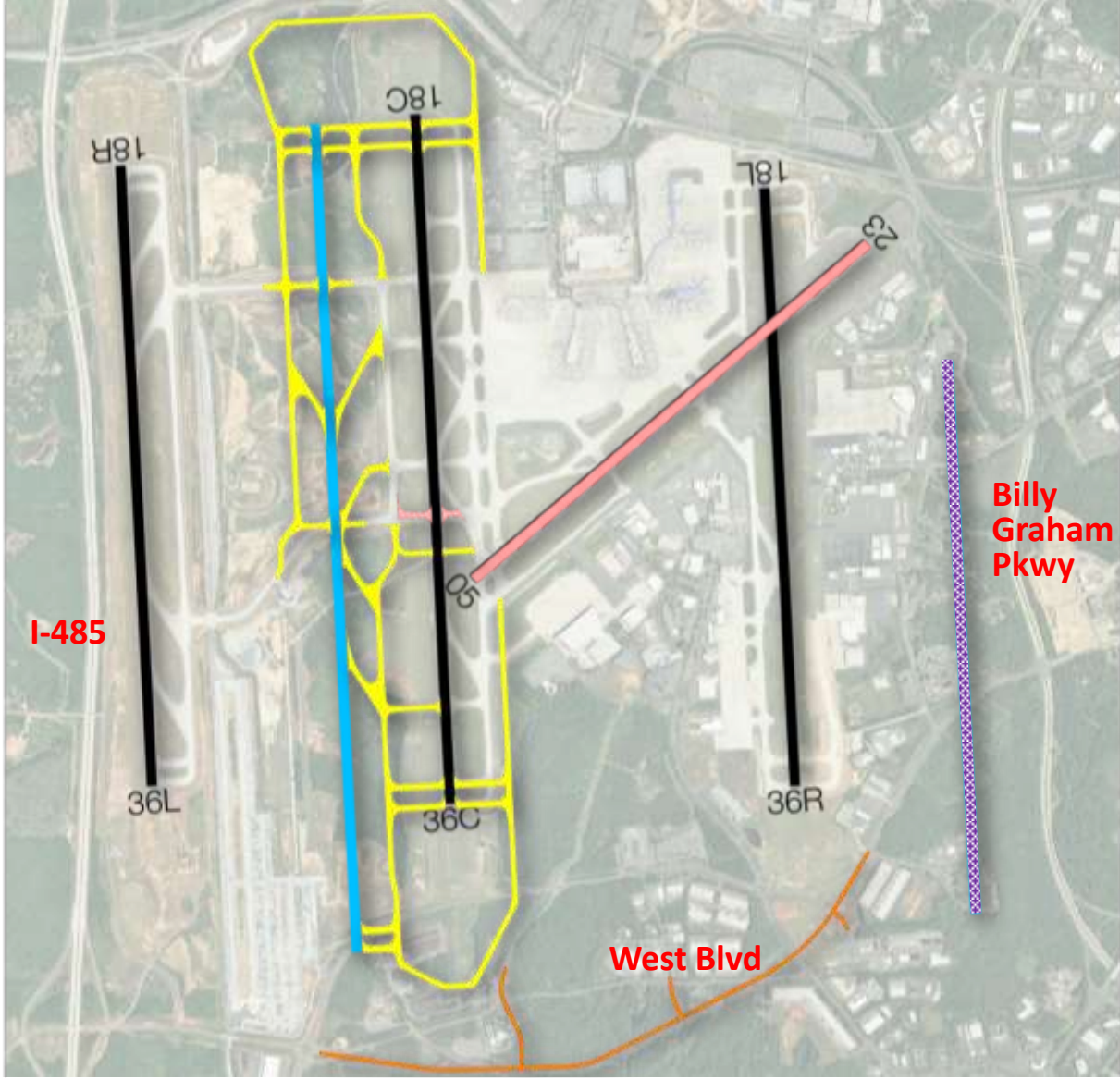
- Commercial passenger operations are over 93% of total operations and increase at 2.7% annually
- Total operations annual growth rate forecast is 2.6%





Airfield Development

Airfield Development



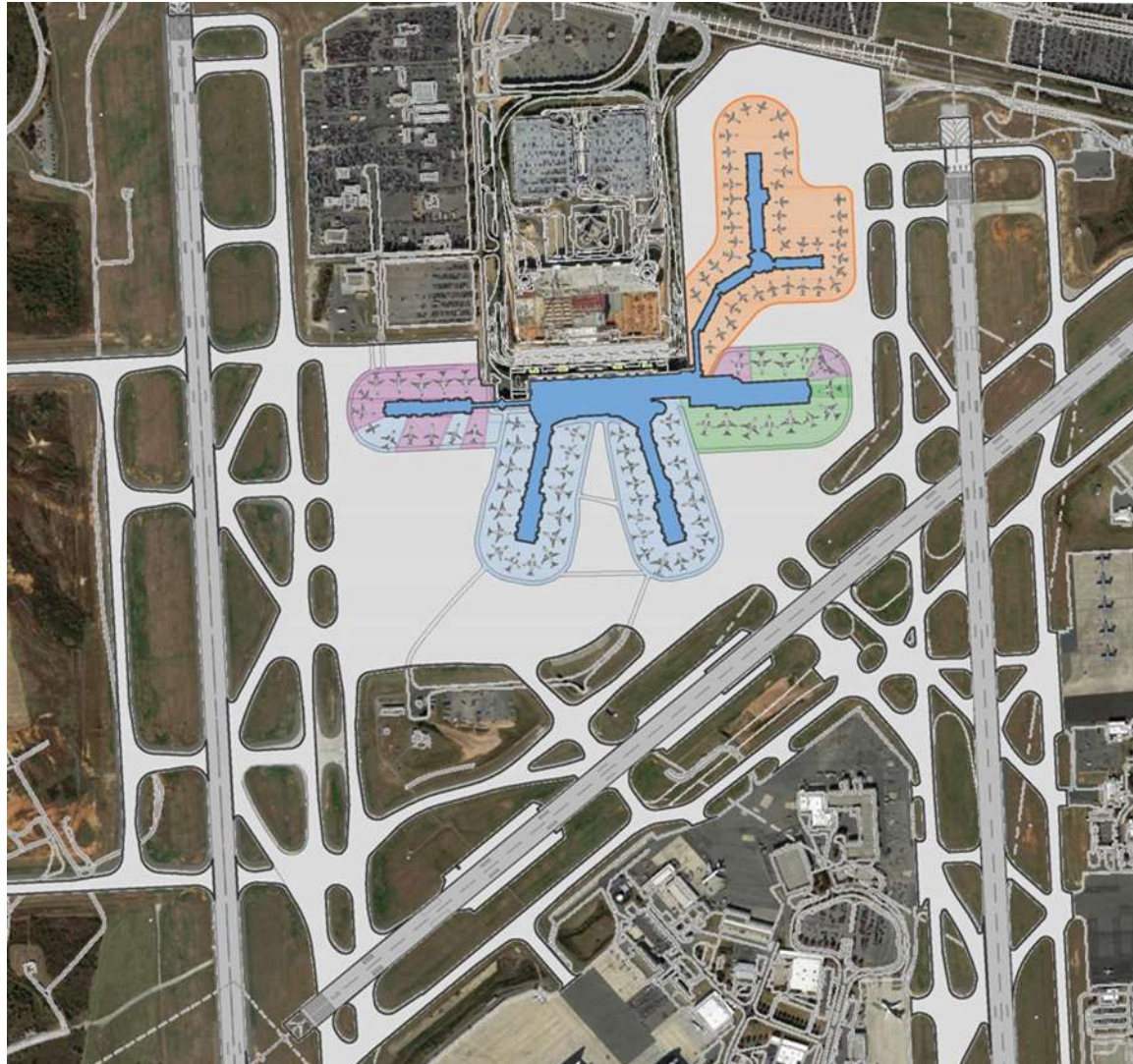


Terminal Development

2015 Terminal Layout



Charlotte-Douglas
INTERNATIONAL AIRPORT



2025 Terminal Layout



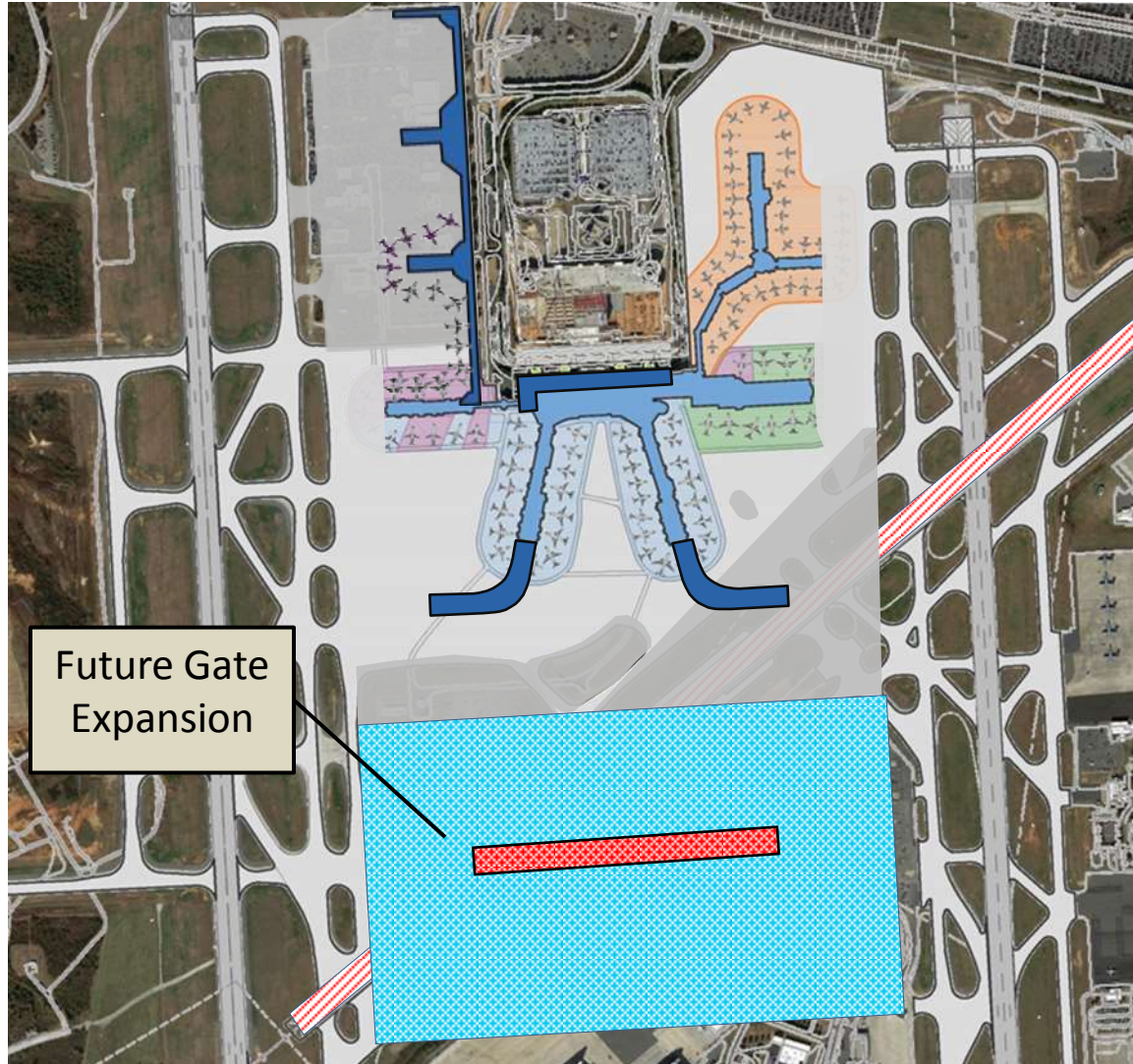
Charlotte-Douglas
INTERNATIONAL AIRPORT



Domestic Gates:	Shown	(Need)
Regional Jets:	55	(55)
Narrow Body:	49	(49)
Wide Body:	4	(3)
Total:	108	(107)
International Gates:		
Regional Jets:	0	(0)
Narrow Body:	9	(9)
Wide Body:	8	(8)
Total:	17	(17)
Total:		
Regional Jets:	55	(55)
Narrow Body:	58	(58)
Wide Body:	12	(11)
Grand Total:	125	(124)

Drawing Legend	
	International
	Domestic
	OAL
	Regional
	Regional / Narrow body
	A.P.M to Concourse

Post 2025 Terminal Layout



Future Gate
Expansion



Norfolk Southern Intermodal Facility

Intermodal Facility



Charlotte-Douglas
INTERNATIONAL AIRPORT

- Public-Private Partnership with Norfolk Southern
- Forecast \$9.5B in local economic impact over 20 years
- Doubled the capacity of NS facility in Uptown – Up to 250,000 lifts annually
- Immediate access to I-485 with connections to I-85 and I-77
- Opened in late 2013

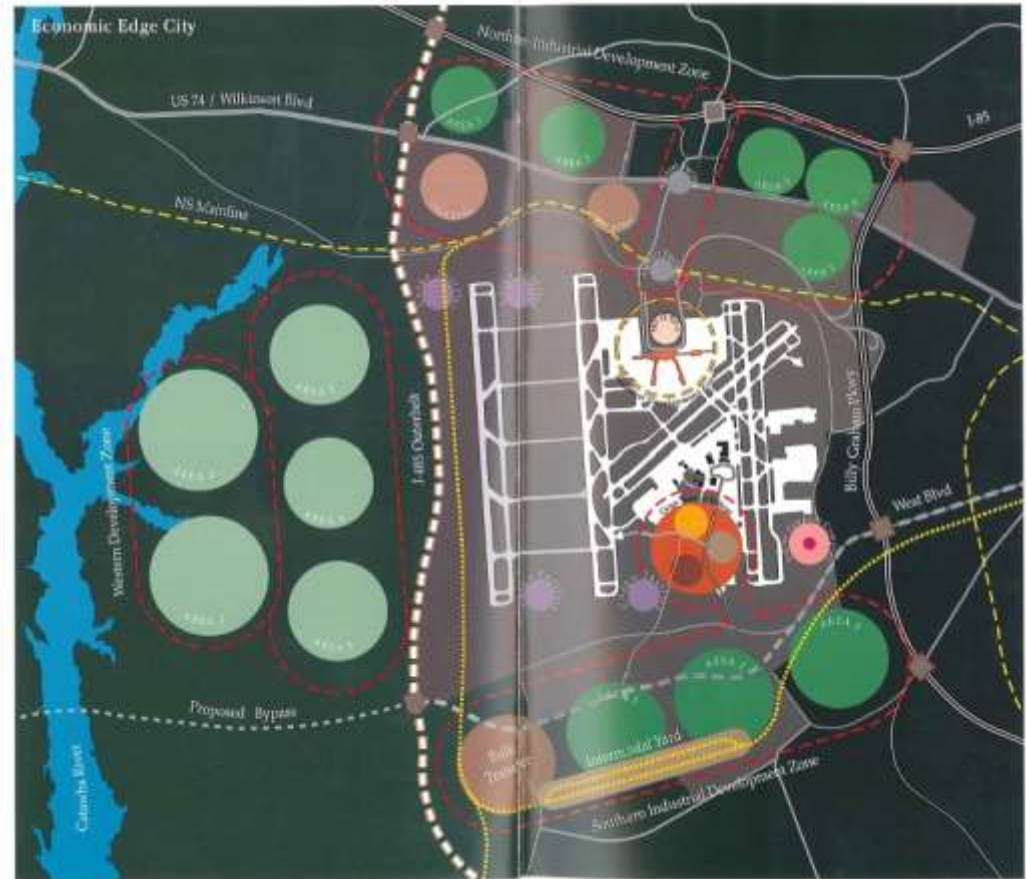




Airport Area Development Plan

1997 Airport Area Development Plan (AADP)

- The first Airport Development Plan was published in 1997
- That plan's objectives have largely been achieved
 - 3rd Parallel Runway
 - Intermodal Facility
 - Realigned Entrance
 - Parking Decks
- It is appropriate to reconsider the development strategy of the area around Charlotte Douglas International Airport





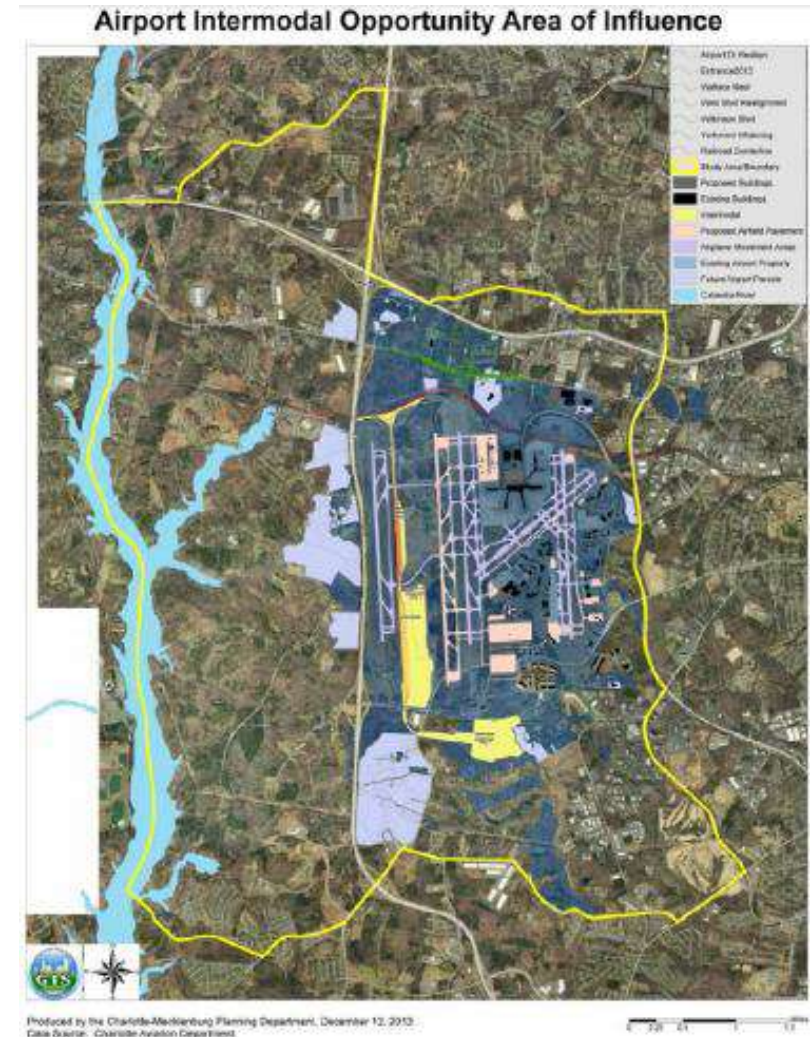
- Airport selected MXD Development Strategists and their team to conduct the 2015 AADP
- MXD has experience with similar projects, including: Denver, Memphis, Atlanta, & Edmonton
- AADP should be complete by September 2016



- Optimize CLT Airport's real estate portfolio
- Enhance the role of the Airport and the area as an economic engine
- Strengthen competitiveness by identifying commercial & economic development opportunities
- Leverage the Airport as a center for intermodal connectivity; air-rail-truck facilities create unique tri-modal connectivity.
- Create more and better jobs.

Three study areas:

- **First Priority** – Airport-owned properties
- **Second Priority** – Adjacent and nearby strategic properties in which the Airport may be interested in participating in a joint venture or P3 arrangement
- **Third Priority** – General opportunities for Airport-compatible uses in adjacent areas and corridors



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