



Pinellas County Commission

January 24, 2017



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



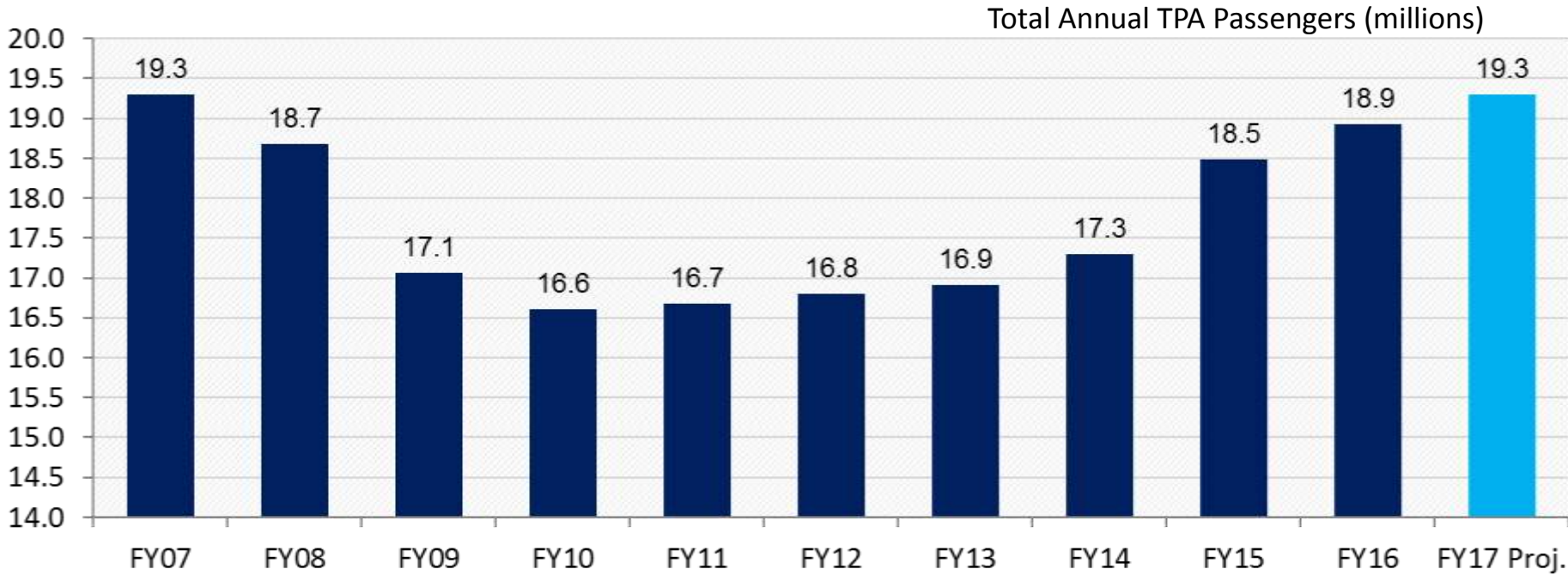


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Air Service and Financial Update

Total Passengers

TPA expects to match its record of 19.3 million passengers in FY2017



New Nonstop International Service



London, England

Daily service on British Airways



Cuba

Service to three cities, commercial flights to Havana began Dec. 12



Zurich, Switzerland

Edelweiss launched flights in 2011



Panama City, Panama

Copa Airlines launched flights in 2013



Bahamas

Silver launched Marsh Harbour in 2015; Nassau service began May 26



Frankfurt, Germany

Lufthansa service began September 2015

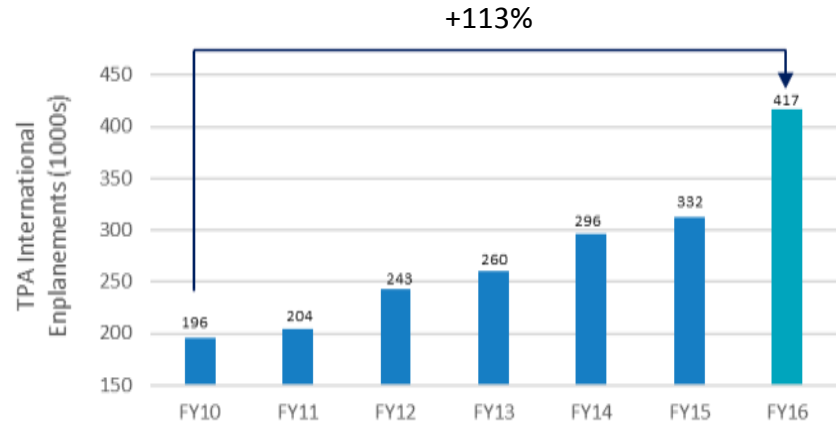


Grand Cayman

Seasonal daily service on Cayman Airways in July and August

International Enplanements

More than doubled in FY16 compared to FY10.



DISCOVER ICELAND



NONSTOP TAMPA TO REYKJAVÍK
SEPTEMBER 2017





BAY TO BAY

NONSTOP TAMPA
TO SAN FRANCISCO



#TPA2SF

Air Service Development Wins

TPA continues to expand both domestic and international service



December 12th
Havana



February 16th
San Francisco



February 16th
Boston



February 17th
Boston



April 7th
**Saint John's,
Canada**



June 5
NY - LaGuardia



September 7th
**Reykjavik,
Iceland**



Tampa Intl Airport (@TPA) · 24 Nov 2016
NEW AIR SERVICE: We are pleased to announce that @Delta will begin TWICE daily service to Boston beginning February 2017!



Tampa International Airport
January 2 at 10:20am · @tpa
BIG NEWS! Southwest Airlines will offer twice-daily nonstop flights to Lufkinville Airport beginning June 4. For more info, visit <http://www.tampaairport.com> or [http://twitter.com/southwest-service-nyo-gum](http://twitter.com/southwestservice-nyo-gum)



International Route Targets - Europe



International Route Targets – Latin America



Bogota



Mexico City

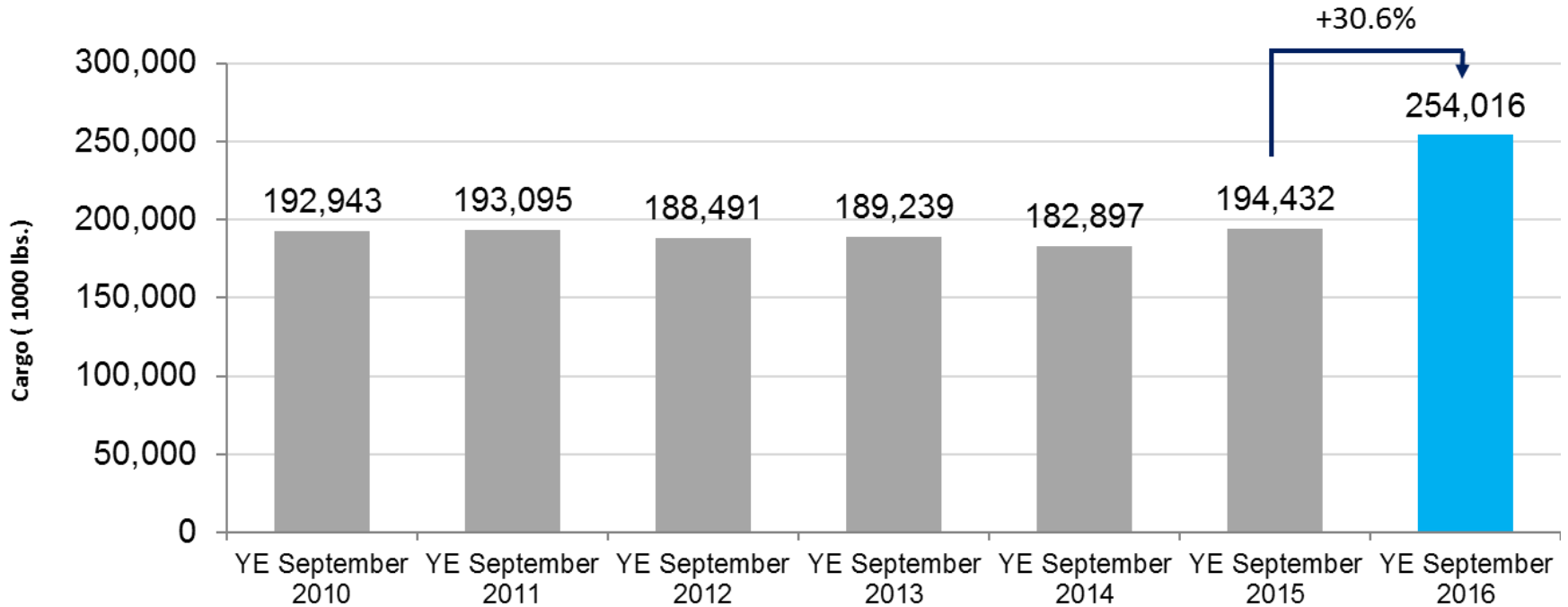


Lima

Domestic Route Targets

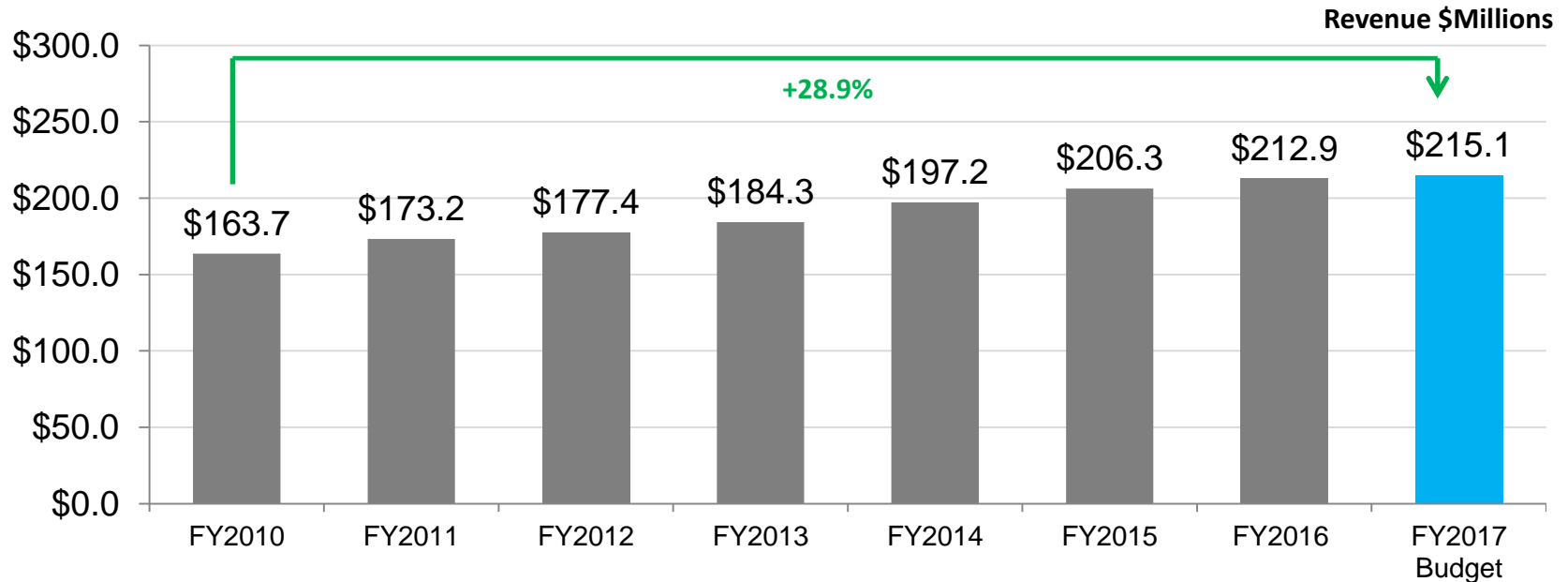


Cargo Volume



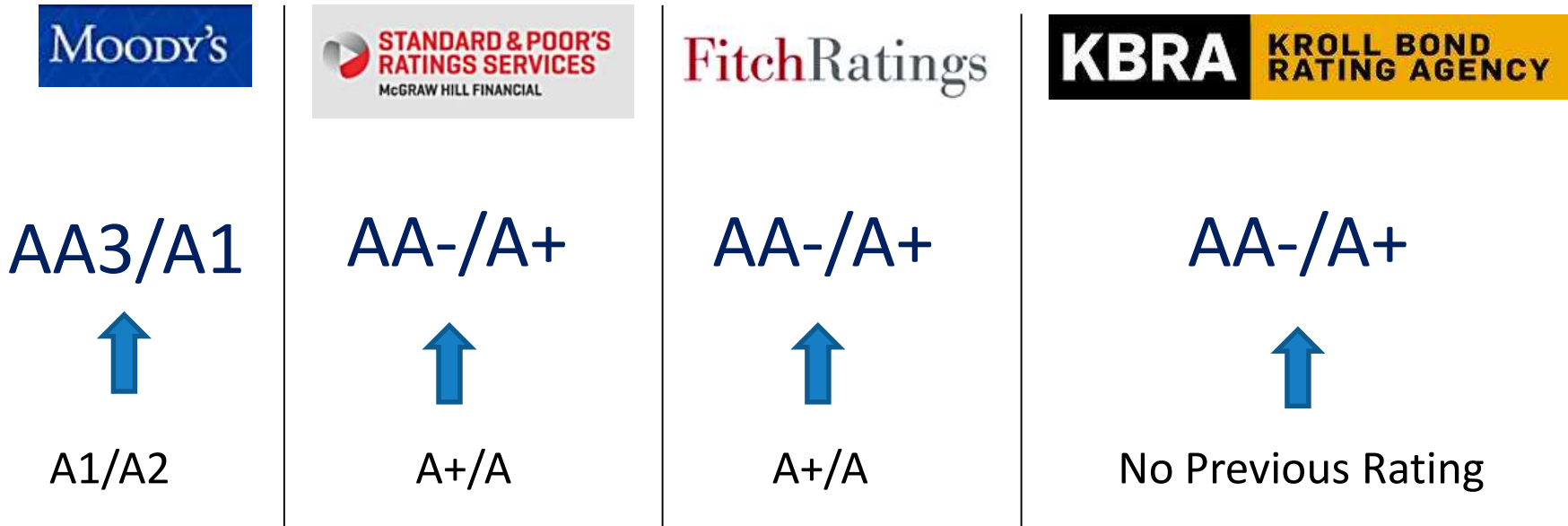
FY2017 Operating Revenues

Operating revenues have increased by almost 29% since 2010 as the Authority has focused on both top-line and bottom-line growth



TPA's Wall Street Credit Ratings

TPA is the only U.S. airport to carry "AA" ratings from all four major bond rating agencies



Top honors for Customer Satisfaction



#2 in North America



#2 Favorite U.S. Airport



#4 Rated U.S. Airport



#2 in North America



#1 Large Hub U.S. Airport



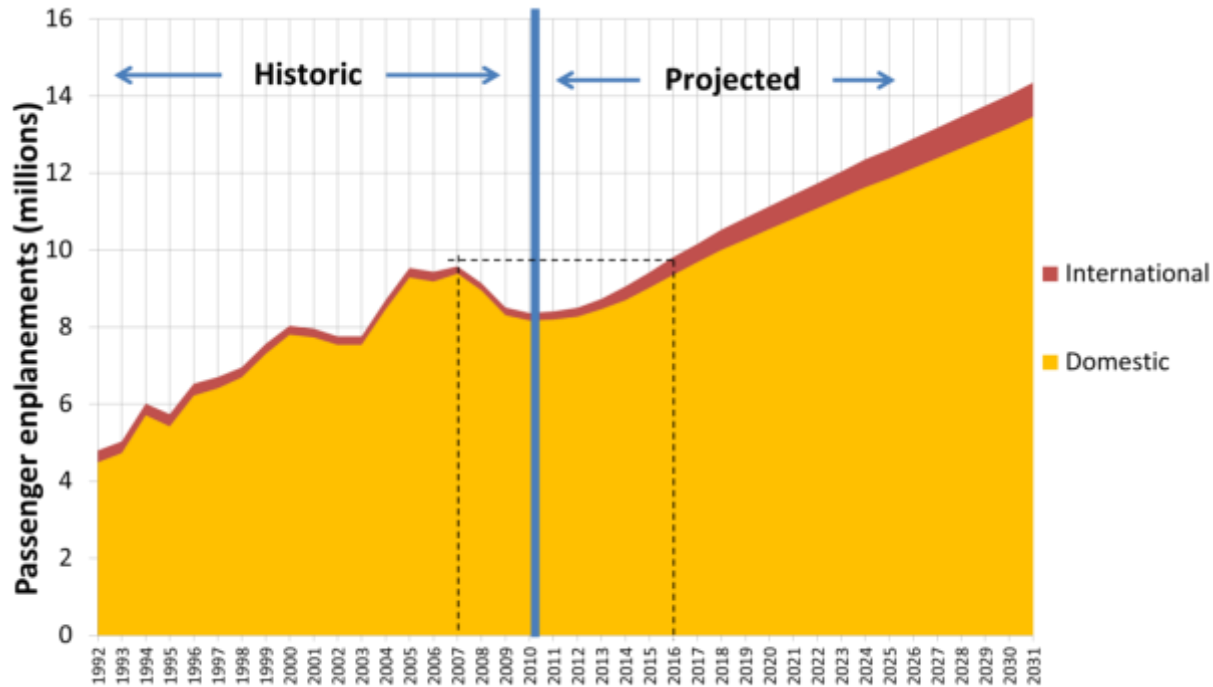
#3 Best U.S. Airport



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Master Plan Update

20-Year Passenger Forecast





Master Plan - Phase 1

Estimated Cost: \$953 million

Jobs created/saved: More than 9,000

Timeline: 2013-2017

Minority contracting: \$122 million

Projects:

- 2.6 million-square-foot rental car center
- 1.4-mile Automated People Mover
- Transfer level expansion/concessions redevelopment

Benefits:

- Removes 2.7 million cars and buses annually from airport roads and curbsides
- Allows passenger growth by allowing rental car companies to grow
- Adds 2,414 spaces to long-term parking
- Connections to regional transportation
- Improves concessions mix to boost revenues

Rental Car Center



October 2015

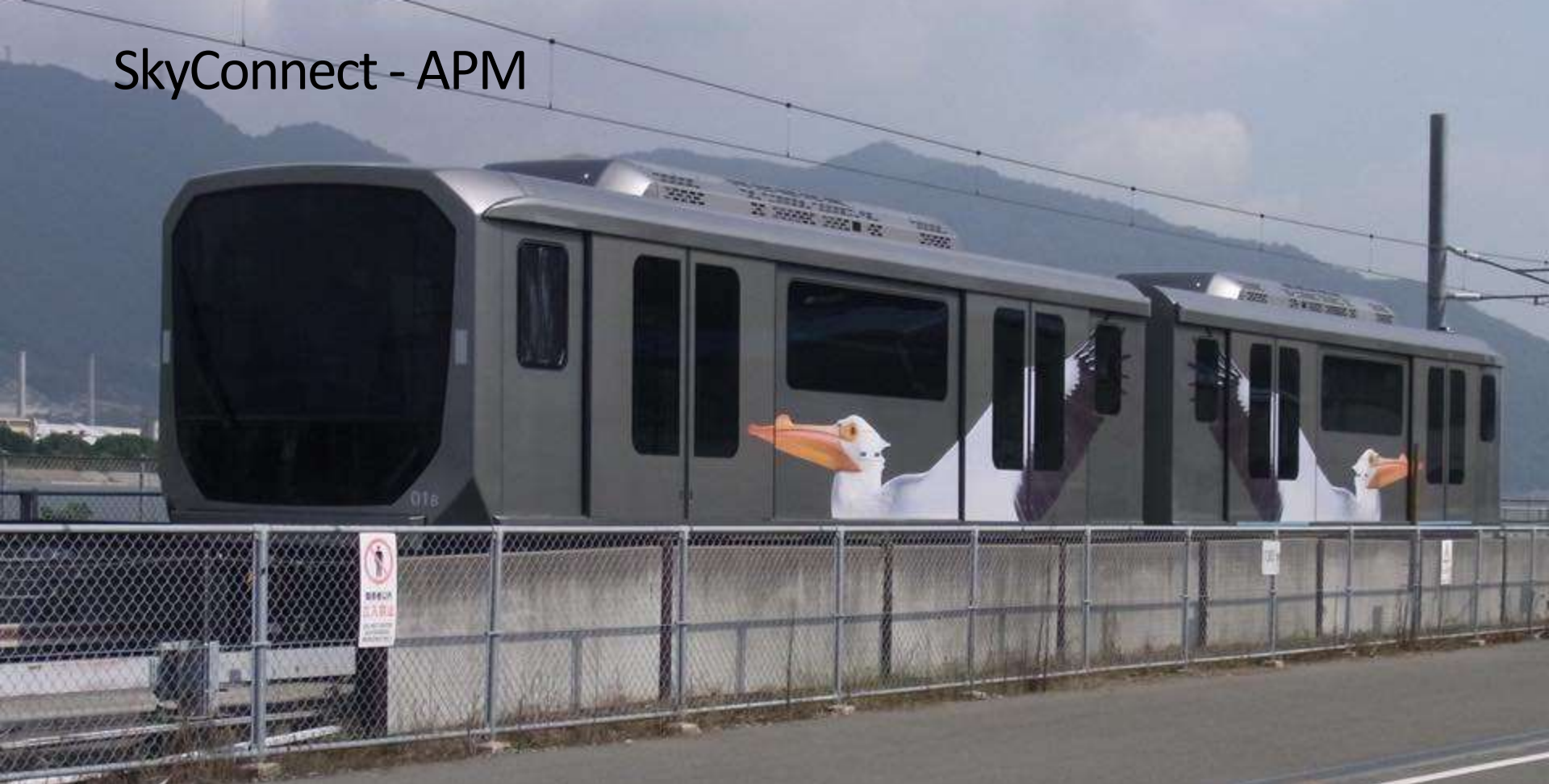


January 2017

SkyConnect - APM



SkyConnect - APM





Taxiway J



October 2015



October 2016

Main Terminal Expansion



January 2015



January 2017

Airport Concessions Redevelopment Program

- 69 new concession locations and employee cafeteria
- More concessionaires, more local concepts, more participation by disadvantaged business owners
- 23 locations opened so far
- Early 2018 program complete
- Four job fairs drew more than 1,200 attendees





TAMPA LIFE

THE SHOPPES AT BAYSHORE



StellarBay



THE GASPARILO BAR

THE Cafe BY MISE EN PLACE

NEW YORK NEW YORK PIZZA



Tampa Bay Times tampabay.com

BAVARO'S PIZZA NAPOLETANA & PASTARIA



LOUIS PAPPAS FRESH GREEK



fitlife x foods powerfully good



Columbian Since 1985 GEM of SPANISH RESTAURANTS

CAFÉ CON LECHE YBOR CITY

Master Plan Economic Impact

- Nearly 2,000 construction workers were on-site during peak days
- 7,547 total project head count
- More than 95 percent of nearly 400 contractors and subcontractors are Florida-based or have regional offices here





TAMPA INTERNATIONAL AIRPORT MASTER PLAN





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