Airports are important economic engines for the regions they serve; creating jobs, facilitating commerce and providing access to the global marketplace.
$152.9 million in annual payroll
(Hillsborough, Merrimack and Rockingham Counties only)

$1.24 billion in total economic impact
(Hillsborough, Merrimack and Rockingham Counties only)

3,820 airport-related jobs
(Hillsborough, Merrimack and Rockingham Counties only)

$752.8 million in out-of-state passenger expenditures*
(lodging, food/beverage, retail purchases and entertainment)

* Employment and payroll related to out-of-state passenger expenditures were not calculated as part of the study
AIRPORT HIGHLIGHTS

- 308,000 square foot passenger terminal with fourteen jet bridges and 11,500 parking spaces
- Runway 17/35 – 9,250 feet; Runway 06/24 – 7,650 feet
- Approximately 180 commercial passenger and cargo operations each day
- Approximately 3.8 million passengers and 179 million pounds of air cargo annually
- 1,900 people are employed “on-airport”
- During the past decade, the airport has invested more than $500 million improving airport facilities, runways, taxiways, navigational aids, roadways and parking
- The airport now contributes approximately $1.24 billion each year to the local economy.
WHY MANCHESTER?

- **LOCATION** - Centrally located in the heart of New England. Serves air travelers from ME, VT, NH and MA

- **CONVENIENCE** - Great highway access, no congestion and plenty of parking

- **POPULATION** - Over six million people live within a two hour’s drive of the airport.

- **SUPPORT** - Strong support from local, state and federal officials, neighbors, the business community and the FAA

- **RELIABILITY** - Manchester • Boston Regional Airport has an exceptional winter operations track record
ORIGIN OF PASSENGERS

*Other represents passengers from outside the four-state region using the airport to access New England.
CHANGING AIRLINE MARKET SHARE

1999
- US Airways: 42.5%
- United: 14.1%
- Continental: 8.1%
- Northwest: 4.1%
- Delta: 5.6%
- Business Express: 3.9%

2009
- Southwest: 61.1%
- Delta: 7.1%
- United: 8.3%
- US Airways: 17.4%
- Continental: 5.8%
- Air Canada: 0.3%
PASSENGER ACTIVITY

Annual Totals (In Thousands)

<table>
<thead>
<tr>
<th>Year</th>
<th>Annual Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1990</td>
<td>784</td>
</tr>
<tr>
<td>1992</td>
<td>826</td>
</tr>
<tr>
<td>1994</td>
<td>840</td>
</tr>
<tr>
<td>1996</td>
<td>893</td>
</tr>
<tr>
<td>1998</td>
<td>1,110</td>
</tr>
<tr>
<td>2000</td>
<td>1,940</td>
</tr>
<tr>
<td>2002</td>
<td>3,367</td>
</tr>
<tr>
<td>2004</td>
<td>4,003</td>
</tr>
<tr>
<td>2006</td>
<td>3,893</td>
</tr>
<tr>
<td>2009</td>
<td>3,717</td>
</tr>
</tbody>
</table>

Record Achievement

4,003, 4,329, 3,897, 3,893
CARGO ACTIVITY

Annual Totals (In Million Pounds)

- 1990: 46
- 1993: 52
- 1996: 81
- 1999: 90
- 2002: 102
- 2005: 109
- 2008: 118
- 2009: 123
- 2010: 134
- 2011: 165
- 2012: 172
- 2013: 168
- 2014: 181
- 2015: 161
- 2016: 162
- 2017: 155
- 2018: 177
- 2019: 194
- 2020: 179

Record Achievement
# AN INDUSTRY IN TURMOIL

## U.S. AIRLINES CEASING OPERATIONS IN 2007 AND 2008

<table>
<thead>
<tr>
<th>U.S. airline</th>
<th>Airport base</th>
<th>Ceased operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 MAXjet Airways</td>
<td>Washington Dulles International</td>
<td>December 25, 2007</td>
</tr>
<tr>
<td>2 Big Sky Airlines</td>
<td>Billings Logan International</td>
<td>March 7, 2008</td>
</tr>
<tr>
<td>3 Aloha Airlines</td>
<td>Honolulu International</td>
<td>March 31, 2008</td>
</tr>
<tr>
<td>4 ATA Airlines</td>
<td>Indianapolis International</td>
<td>April 3, 2008</td>
</tr>
<tr>
<td>5 Skybus Airlines</td>
<td>Port Columbus International</td>
<td>April 5, 2008</td>
</tr>
<tr>
<td>6 Eos Airlines</td>
<td>New York John F. Kennedy International</td>
<td>April 27, 2008</td>
</tr>
<tr>
<td>7 Champion Air</td>
<td>Minneapolis-St. Paul International</td>
<td>May 31, 2008</td>
</tr>
<tr>
<td>8 Air Midwest</td>
<td>Kansas City International</td>
<td>June 30, 2008</td>
</tr>
</tbody>
</table>

*Note: Frontier and Sun Country airlines filed for Chapter 11 bankruptcy protection on April 11, 2008 and October 6, 2008, respectively.*
# AN INDUSTRY IN TURMOIL

## PLANNED AIRCRAFT RETIREMENTS IN 2008 AND 2009

<table>
<thead>
<tr>
<th>Aircraft type</th>
<th>American</th>
<th>Continental</th>
<th>Delta</th>
<th>JetBlue</th>
<th>Northwest</th>
<th>US Airways</th>
<th>United</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Narrowbody</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A300/A320</td>
<td>10</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>4</td>
<td>--</td>
<td>14</td>
</tr>
<tr>
<td>B-737-300/500</td>
<td>--</td>
<td>67</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>6</td>
<td>100</td>
<td>173</td>
</tr>
<tr>
<td>B-757</td>
<td>--</td>
<td>--</td>
<td>5</td>
<td>--</td>
<td>14</td>
<td>--</td>
<td>--</td>
<td>19</td>
</tr>
<tr>
<td>B-767</td>
<td>--</td>
<td>--</td>
<td>5</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>5</td>
</tr>
<tr>
<td>DC-9</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>33</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>33</td>
</tr>
<tr>
<td>MD 80</td>
<td>30</td>
<td>--</td>
<td>5</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>35</td>
</tr>
<tr>
<td>Widebody</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A320-300</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>2</td>
<td>--</td>
<td>2</td>
</tr>
<tr>
<td>B-747</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Regional jets</td>
<td>37</td>
<td>64</td>
<td>100</td>
<td>4</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>205</td>
</tr>
<tr>
<td>Turboprops</td>
<td>26</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>26</td>
</tr>
<tr>
<td>Total</td>
<td>103</td>
<td>131</td>
<td>115</td>
<td>4</td>
<td>47</td>
<td>12</td>
<td>106</td>
<td>518</td>
</tr>
</tbody>
</table>

Note: Includes 10 aircraft that are being returned under leases or capacity purchase arrangements. Sources: Individual airline filings with the U.S. Securities and Exchange Commission and press releases.
## AIRLINE SEATING CAPACITY AT U.S. AIRPORTS

Year-over-year percent increase (decrease)

<table>
<thead>
<tr>
<th>Airline</th>
<th>2008 Q4</th>
<th>2009 Q1</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Airlines</td>
<td>(11.9%)</td>
<td>(12.4%)</td>
</tr>
<tr>
<td>Spirit Airlines</td>
<td>(12.0)</td>
<td>(12.7)</td>
</tr>
<tr>
<td>American Airlines</td>
<td>(11.0)</td>
<td>(11.2)</td>
</tr>
<tr>
<td>Frontier Airlines</td>
<td>(7.7)</td>
<td>(10.2)</td>
</tr>
<tr>
<td>Continental Airlines</td>
<td>(8.3)</td>
<td>(9.1)</td>
</tr>
<tr>
<td>Alaska Airlines</td>
<td>(9.3)</td>
<td>(8.0)</td>
</tr>
<tr>
<td>Southwest Airlines</td>
<td>(0.5)</td>
<td>(6.6)</td>
</tr>
<tr>
<td>Northwest Airlines</td>
<td>(6.6)</td>
<td>(7.4)</td>
</tr>
<tr>
<td>US Airways</td>
<td>(8.6)</td>
<td>(9.2)</td>
</tr>
<tr>
<td>JetBlue Airways</td>
<td>(2.9)</td>
<td>(1.1)</td>
</tr>
<tr>
<td>Delta Air Lines</td>
<td>(9.3)</td>
<td>(5.4)</td>
</tr>
<tr>
<td>AirTran Airlines</td>
<td>(6.7)</td>
<td>(3.6)</td>
</tr>
<tr>
<td>Hawaiian Airlines</td>
<td>22.4</td>
<td>24.2</td>
</tr>
<tr>
<td><strong>All airlines</strong></td>
<td><strong>(8.7)</strong></td>
<td><strong>(9.2)</strong></td>
</tr>
</tbody>
</table>
MHT’S EROSION OF SEAT CAPACITY

Available Seats/Week at Manchester-Boston Regional Airport

-35.2%
IMPACT OF DECREASED AIR SERVICE

↓ Seat Capacity
   =

↓ Passenger Activity
   =

↓ Parking Revenue
   =

↓ Concession Revenue
   =

↓ Passenger Facility Charges ($4.50/passenger)
   =

↓ Operating Budget
1990 MASTER PLAN UPDATE

- 158,000 square foot passenger terminal and associated ramp
- Surface parking
- Airport roadway system
1997 MASTER PLAN UPDATE

- Taxiway bridge and associated taxiway connecting Runway 06 to terminal ramp
- Reconstruct and lengthen Runway 17/35 from 7,000 feet to 9,250 feet
- Reconstruct and lengthen Runway 06/24 from 5,850 feet to 7,650 feet
- Navigational aid enhancements
- Airport roadway system improvements
- 4,800 space parking garage and additional surface parking
- (2) 75,000 square foot passenger terminal additions
- 520 foot elevated pedestrian bridge
2009 MASTER PLAN UPDATE

- Additional passenger terminal expansion
- Improved international capabilities
- Airport roadway system improvements
- Environmental initiatives
- Additional parking garage and/or surface parking
- Relocation and expansion of rental car operations
- Air cargo facility expansion
- Long-range land use planning
- Local zoning regulations
- Intermodal facilities
RECENT PROJECTS & ONGOING INITIATIVES

- Runway 24 Safety Area EMAS
- Terminal Trench Drain Replacement (alkali silica reaction)
- Residential Sound Insulation Program (1,300 homes; $54 M)
- Airport Environmental Action Committee/Energy Audit
- Increase public ground transportation between the airport, Boston and other popular regional destinations
- NHDOT Airport Access Road
- Pettingill Road
- Commuter passenger rail between New Hampshire and Massachusetts
RECENT PROJECTS &
ONGOING INITIATIVES

Engineered Material Arresting System (EMAS)
RECENT PROJECTS & ONGOING INITIATIVES

Engineered Material Arresting System (EMAS)
RECENT PROJECTS & ONGOING INITIATIVES

NHDOT Airport Access Road

Pettingill Road
Passenger terminal with 18 - 23 jet gates and expanded Federal Inspection Services (FIS) facilities

New airlines and new domestic and international nonstop destinations

100 to 125 jet departures each day

4 to 6 million passengers annually by 2020

Completion of the NHDOT Airport Access Road

Improved ground transportation and rail connectivity between Massachusetts and New Hampshire

Five-star hotel complex with conference/convention facilities and other private investments
THANK YOU

Manchester-Boston
REGIONAL AIRPORT

A Better Way to Travel!