Airline Route Development is a Core Element of Massport’s Mission

- **Enhance the economic growth** in Massachusetts and New England, by enabling people of this region to travel and do business anywhere in the world.

- Strengthen Boston Logan International Airport’s position as the Gateway to New England.

- Attract new international and domestic air services and expansion of existing service at Logan.
  - Including expansion of Low-Cost Carrier services to maintain competitive fares.
Boston Logan International Airport (BOS) is One of the Busiest Origin-Destination (O&D) Airports in the U.S.

- Over 36.2 million passengers carried in CY 2016
  - 6th Year of record-breaking traffic
    - Including 6.6 million international passengers
    - Approximately 90% of BOS passengers are local origin-destination (o&d)
- Served by 56 scheduled air carriers
  - Including 30 foreign flag carriers and 11 low-cost carriers
  - No airline has over 27% market share
- jetBlue & Delta are rapidly growing their BOS ‘hubs’
  - jetBlue: 150 departures/day to 63 destinations, with plans to grow to 200 departures/day
  - Delta: 100 departures/day to 30 destinations, with plans to grow to 150 departures/day
- 5 main runways, plus 1 commuter runway
  - No slot constraints
- 4 passenger terminals, 98 gates total
- Over 640 million pounds of cargo and mail carried in CY 2016
  - Over 508,000 sq. ft. of on-airport cargo facilities
Boston Logan is Expected to Reach 40 Million Passengers Before 2020

Actual and Near-Term Forecast Total BOS Passengers

Note: Excludes GA passengers.

Source: Massport and InterVISTAS forecast.
International Passengers at Boston Logan have Grown Much Faster Than Domestic Passengers

Note: Excludes GA passengers.
Source: Massport
Boston Logan has Nonstop Domestic Service to 75 Destinations
Boston Logan has Nonstop International Service to 54 Destinations

Note: Includes Seasonal Service, Source: OAG & Innovata Schedules
In the Past 12 Years, We have been Successful in Adding New Service to Many Key Destinations Worldwide

**New Service**

<table>
<thead>
<tr>
<th>Europe</th>
<th>Caribbean/Latin</th>
<th>US/Canada</th>
</tr>
</thead>
<tbody>
<tr>
<td>➤ Copenhagen</td>
<td>➤ Barbados</td>
<td>➤ Atlantic City</td>
</tr>
<tr>
<td>➤ Dublin</td>
<td>➤ Bogota</td>
<td>➤ Austin</td>
</tr>
<tr>
<td>➤ Dusseldorf</td>
<td>➤ Grand Cayman</td>
<td>➤ Charleston</td>
</tr>
<tr>
<td>➤ Lisbon</td>
<td>➤ Liberia, CR</td>
<td>➤ Dallas-Love</td>
</tr>
<tr>
<td>➤ London-Gatwick</td>
<td>➤ Mexico City</td>
<td>➤ Houston-Hobby</td>
</tr>
<tr>
<td>➤ Madrid</td>
<td>➤ Panama City</td>
<td>➤ Nashville</td>
</tr>
<tr>
<td>➤ Manchester</td>
<td>➤ Port au Prince</td>
<td>➤ New Orleans</td>
</tr>
<tr>
<td>➤ Oslo</td>
<td>➤ Puerto Plata</td>
<td>➤ Norfolk</td>
</tr>
<tr>
<td>➤ <strong>+ 2 new destinations</strong> (announcement 7/19/17)</td>
<td>➤ Punta Cana</td>
<td>➤ Portland, OR</td>
</tr>
<tr>
<td>➤ <strong>+ 2 new destinations</strong> (announcement 7/19/17)</td>
<td>➤ St. Lucia</td>
<td>➤ Sacramento</td>
</tr>
<tr>
<td>➤ <strong>+ 2 new destinations</strong> (announcement 7/19/17)</td>
<td>➤ St. Maarten</td>
<td>➤ San Jose</td>
</tr>
<tr>
<td>➤ <strong>+ 2 new destinations</strong> (announcement 7/19/17)</td>
<td>➤ St. Thomas</td>
<td>➤ Sarasota</td>
</tr>
<tr>
<td>➤ <strong>+ 2 new destinations</strong> (announcement 7/19/17)</td>
<td>➤ Santiago, DR</td>
<td>➤ Savannah</td>
</tr>
<tr>
<td>➤ <strong>+ 2 new destinations</strong> (announcement 7/19/17)</td>
<td></td>
<td>➤ Toronto-City Centre</td>
</tr>
<tr>
<td>➤ <strong>+ 2 new destinations</strong> (announcement 7/19/17)</td>
<td></td>
<td>➤ Vancouver</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Asia</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>➤ Beijing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>➤ Hong Kong</td>
<td></td>
<td></td>
</tr>
<tr>
<td>➤ Shanghai</td>
<td></td>
<td></td>
</tr>
<tr>
<td>➤ Tokyo</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Middle East</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>➤ Doha</td>
<td></td>
<td></td>
</tr>
<tr>
<td>➤ Dubai</td>
<td></td>
<td></td>
</tr>
<tr>
<td>➤ Istanbul</td>
<td></td>
<td></td>
</tr>
<tr>
<td>➤ Tel Aviv</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**International nonstop destinations from Logan have more than doubled in the past 10 years**
We have also been Successful in Expanding Service to Several Existing Destinations, and Adding Low-Cost Carriers

Expanded Service

 позволил успех в расширении сервиса до нескольких существующих направлений, а также добавление低成本运营商

- Europe
  - Amsterdam #2
  - Dublin #2, 3
  - Lisbon #2
  - London #6
  - Madrid #2
  - Manchester #2
  - Munich (to year-round)
  - Paris #4, 5
  - Reykjavik #3, 4
  - Shannon (to year-round)
  - Zurich #2

- Caribbean/Latin
  - Cancun #3
  - Santo Domingo #2

Low-Cost Carrier (LCC) Growth

- jetBlue BOS ‘hub’ development: 150 daily departures, growing to 200 daily departures
- Spirit started service in 2006
- Southwest started service in 2009
- Sun Country started service in 2009
- Virgin America started service in 2009
- Porter started service in 2009
- WOW Air started service in 2015
- Norwegian started service in 2015
- WestJet started service in 2016
- Air Berlin started service in 2016
- Thomas Cook started service in 2016
- + new carrier (announcement 7/19/17)

Global Network Carrier Growth

- Delta BOS ‘hub’ development: 100 daily departures, growing to 150 daily departures
Opportunities for Further Growth Exist in the Next Few Years

**New Service**
- Europe
  - Barcelona
  - Edinburgh/Glasgow
  - Milan
  - Stockholm
- Asia
  - Delhi/Mumbai
  - Seoul
- Caribbean/Latin
  - Havana
  - San Jose, CR
  - Sao Paulo

**Expanded Service**
- Europe
  - France
  - Germany
  - Ireland
  - UK
- Caribbean/Latin
  - Continued LCC growth
- US/Canada
  - Continued LCC & Network Carrier growth
Long Term, our Goal is to Link Boston and New England with Key Destinations Across the Globe

Note: Includes Seasonal Service, Source: OAG & Innovata Schedules
Boston, Massachusetts and New England Remain Ready to Support New Airline Service

- Associated Industries of Massachusetts
- Association of Independent Colleges & Universities in Massachusetts
- Coalition of New England Companies for Trade
- Consulate Corps
- Discover New England
- Greater Boston Chamber of Commerce
- Greater Boston Convention & Visitors Bureau
- Massachusetts Biotechnology Council
- Massachusetts Business Roundtable
- Massachusetts Clean Energy Center
- Massachusetts Competitive Partnership
- Massachusetts Export Center
- Massachusetts High Technology Council
- Massachusetts Life Sciences Center
- Massachusetts Lodging Association
- Massachusetts Medical Device Industry Council
- Massachusetts Office of Business Development
- Massachusetts Office of International Trade & Investment
- Massachusetts Office of Travel & Tourism
- Massachusetts Technology Collaborative
- Mass Challenge
- Mass Econ
- Mass Global Partners
- Mass Insight
- Mass Technological Leadership Council
- New England Business Travel Association
- New England Council
- New England Board of Higher Education
- World Boston
New International Air Services to Boston Generate a Significant Economic Impact to the Region

<table>
<thead>
<tr>
<th>Route</th>
<th>Economic Impact of New Service ($millions)</th>
<th>Taxes From Income and Sales ($millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Current International Routes</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Beijing</td>
<td>$282</td>
<td>$10</td>
</tr>
<tr>
<td>Bogota</td>
<td>$50</td>
<td>$2</td>
</tr>
<tr>
<td>Doha</td>
<td>$127</td>
<td>$5</td>
</tr>
<tr>
<td>Dubai</td>
<td>$134</td>
<td>$5</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>$164</td>
<td>$6</td>
</tr>
<tr>
<td>Istanbul</td>
<td>$110</td>
<td>$4</td>
</tr>
<tr>
<td>Mexico City</td>
<td>$54</td>
<td>$2</td>
</tr>
<tr>
<td>Panama City</td>
<td>$60</td>
<td>$2</td>
</tr>
<tr>
<td>Shanghai</td>
<td>$255</td>
<td>$9</td>
</tr>
<tr>
<td>Tel Aviv</td>
<td>$63</td>
<td>$2</td>
</tr>
<tr>
<td>Tokyo</td>
<td>$90</td>
<td>$3</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td>$1,388</td>
<td>$50</td>
</tr>
<tr>
<td><strong>Future International Routes</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delhi</td>
<td>$130</td>
<td>$6</td>
</tr>
<tr>
<td>Sao Paulo</td>
<td>$139</td>
<td>$5</td>
</tr>
<tr>
<td>Seoul</td>
<td>$134</td>
<td>$5</td>
</tr>
<tr>
<td><strong>Subtotal</strong></td>
<td>$403</td>
<td>$16</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$1,792</td>
<td>$66</td>
</tr>
</tbody>
</table>

Note: Numbers may not add due to rounding.

Note: International routes qualifying for Massport’s International Air Service Incentive Program; routes matured to daily, steady-state condition.
Thank You.....Thank You Very Much

For more information, please contact:

Yil Surehan
Director, Airline Route Development
Massachusetts Port Authority (Massport)
(617) 568-3989
YSurehan@Massport.com