



ACI-NA Benchmarking Webinar

February 22, 2018



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

Agenda

- ACI Benchmarking Survey Overview
- The Importance of Benchmarking
- FY2016 vs. FY2015 Summary By Hub Type
- FY2016 vs. FY2015 Key Metrics By Hub Type
- FY2016 Key Metrics Top Performers
- Current Airport Benchmarking Examples
- ACI Centerlines Finance Benchmarking Tool
- Upcoming ACI Benchmarking Efforts
- Questions

ACI-NA Benchmarking Survey Overview

- Traffic / Flight Operations
 - Total Operations
 - Cargo Operations
 - Passenger Airline Operations
 - Total Landed Weights
 - Total Cargo Landed Weights
 - Total Passengers
 - Enplaned Passengers
 - Connecting Passengers
- Expenses
 - Total Expenses
 - Personnel Expenses
 - Full Time Equivalent Headcount
 - Non-Personnel Expenses
 - Expense Breakout Categories
- Capital Program
- Revenues
 - Total Revenues
 - Airline Revenues
 - Non-Airline Revenues
 - Concessions
 - Rental Car
 - Parking/Ground Transportation
 - Rental/Lease Revenues
- Debt
 - Total Debt
 - Fixed Rate Debt
 - Variable Rate Debt
 - Annual Debt Service
- Net Income
- Other
 - TNC Transactions

Per Passenger
Per Connecting Passenger
Per Enplaned Passenger
Per Intl. Passenger
Per Operation
Per Cargo Operation
Per Parking Space
Per Square Foot
Per Employee

FY2016 ACI-NA Benchmarking Survey Overview

- 98 airports submitted responses for the FY2016 Benchmarking Survey

Airport Type	FY2015 Submissions	FY2016 Submissions
Large Hub Airports	28	28
Medium Hub Airports	23	23
Small Hub Airports	29	27
Non-Hub Airports / Other U.S. Airports	10	10
Canadian Airports	12	10

- 4 less than in 2016, primarily due to several airports indicating that they would not be able to participate due to a lack of resource or staff shortage in their Finance areas
- Thanks to Ashley Sng from ACI-NA, as well as members of the Strategic Planning and Performance Management working group for continually reaching out to the airport community to try and drive participation in the survey

The Importance of Benchmarking Survey Data

- How are we doing versus our competitors?
- How are we doing versus our competitive set?
- Unit-level analysis (per passenger, per operation, etc.)
- Improving internal results and driving the bottom line
- Tampa International Airport utilizes the Benchmarking Survey data extensively to gauge efficiency and improvement across both revenue and expense categories
 - Revenue per employee
 - Are we getting more out of our staff?
 - Concession Sales per square foot
 - Do we have the right mix of food & beverage or retail units
 - Parking Transactions per enplaned passenger
 - Is our originating passengers propensity to park changing?



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ACI-NA Benchmarking Survey Results



FY2016 vs. FY2015 Summary By Hub Type

Industry Overview

- 90 airports completed both the FY2015 and FY2016 ACI-NA Benchmarking Surveys
- Total operations up slightly year over year, with cargo operations growth rates outpacing passenger operations growth
- Passenger traffic continues to grow
- Revenues are up, primarily driven by non-airline revenues
- Significant increase in TNC trips
- Expense growth levels matched revenue growth levels year over year
- Capital Expenditures and outstanding debt levels both increased by sizable levels

Total Operations	1.6%
Passenger Airline Operations	1.0%
Cargo Airline Operations	2.2%
Total Landed Weights	3.5%
Total Cargo Landed Weights	7.0%
Total Passengers	5.0%
Total Operating Revenue	6.1%
Total Non-Airline Revenue	6.8%
Total Terminal Concessions Revenue	5.3%
Total Rental Car Revenues	3.4%
Total Public Parking & Ground Transportation Revenue	6.7%
Total Public Parking Exit Transactions	1.6%
Total TNC Trips	567.4%
Total Operating Expenses	6.1%
Total Utilities	-2.9%
Total FTE's	4.7%
Total Personnel Costs	10.5%
Total Capital Expenditures	6.3%
Total Debt Outstanding	9.6%

Large Hub Airports

- 28 airports submitted the FY2016 survey, one less than last year
- Year over year performance at the large hubs mirrored the larger overall group
- Passenger Airline Operations up slightly with Cargo operations seeing higher growth rates
- Passenger traffic continuing strong growth
- Airlines continued to increase equipment gauge instead of adding frequencies
- Significant increase in cargo landed weights
- Significant increase in the number of TNC pickups and drop-offs
- Double digit increase in large hub debt

Total Operations	1.4%
Passenger Airline Operations	2.0%
Cargo Airline Operations	4.7%
Total Landed Weights	4.7%
Total Cargo Landed Weights	6.6%
Total Passengers	4.8%
Total Operating Revenue	6.6%
Total Non-Airline Revenue	7.2%
Total Terminal Concessions Revenue	3.7%
Total Rental Car Revenues	2.8%
Total Public Parking & Ground Transportation Revenue	6.5%
Total Public Parking Exit Transactions	4.3%
Total TNC Trips	553.3%
Total Operating Expenses	6.7%
Total Utilities	-2.7%
Total FTE's	6.0%
Total Personnel Costs	12.0%
Total Capital Expenditures	5.3%
Total Debt Outstanding	14.4%

Medium Hub Airports

- 23 MH airports submitted the FY2016 survey, the same as last year
- Decrease in passenger airline operations
- Passenger growth higher than the large hubs or the industry as a whole
- Cargo operations and landed weight growth outpaced passenger operations
- Strong year for Terminal Concessions revenue growth, offsetting lower growth with rental cars
- Continued strong growth in parking and ground transportation revenues
- Significant year over year increase in capital expenditures

Total Operations	-2.6%
Passenger Airline Operations	-2.1%
Cargo Airline Operations	1.2%
Total Landed Weights	5.4%
Total Cargo Landed Weights	6.6%
Total Passengers	5.5%
Total Operating Revenue	4.5%
Total Non-Airline Revenue	4.6%
Total Terminal Concessions Revenue	7.8%
Total Rental Car Revenues	1.9%
Total Public Parking & Ground Transportation Revenue	7.2%
Total Public Parking Exit Transactions	-5.3%
Total TNC Trips	687.6%
Total Operating Expenses	2.7%
Total Utilities	-5.3%
Total FTE's	1.0%
Total Personnel Costs	7.5%
Total Capital Expenditures	31.3%
Total Debt Outstanding	-0.6%

Small Hub Airports

- 27 small-hub airports submitted the FY2016 survey, down from 29 airports last year
- Largest growth in airline operations of any of the hub groupings
- Fewer cargo operations but larger aircraft
- Revenue growth on par with the rest of the industry
- Rental car and public parking revenues continued to grow
- Expense growth close to inflation
- Number of FTE's dropped but personnel costs increased measurably
- Capital programs increased but debt declined by double digits

Total Operations	10.4%
Passenger Airline Operations	6.3%
Cargo Airline Operations	-4.8%
Total Landed Weights	5.0%
Total Cargo Landed Weights	4.7%
Total Passengers	4.4%
Total Operating Revenue	4.9%
Total Non-Airline Revenue	5.6%
Total Terminal Concessions Revenue	3.3%
Total Rental Car Revenues	4.1%
Total Public Parking & Ground Transportation Revenue	8.4%
Total Parking Exit Transactions	1.1%
Total TNC Trips	5312.6%
Total Operating Expenses	2.3%
Total Utilities	-2.5%
Total FTE's	-4.0%
Total Personnel Costs	6.5%
Total Capital Expenditures	8.1%
Total Debt Outstanding	-10.5%

Non-Hub Airports

- 10 non-hub airports submitted the FY2016 survey
- 30% passenger growth driven by 2 of the non-hub airports
- Strong rental car and parking performance
- Strong focus on improved concessions sales at the non-hub airports
- Higher increase in operating expenses versus the larger airports
- Smaller capital programs
- Significant year over year reduction in debt

Total Operations	-9.2%
Passenger Airline Operations	-49.6%
Cargo Airline Operations	4.4%
Total Landed Weights	1.4%
Total Cargo Landed Weights	2.2%
Total Passengers	30.0%
Total Operating Revenue	4.2%
Total Non-Airline Revenue	6.5%
Total Terminal Concessions Revenue	23.2%
Total Rental Car Revenues	8.0%
Total Public Parking & Ground Transportation Revenue	8.3%
Total Parking Exit Transactions	-0.6%
Total TNC Trips	NA
Total Operating Expenses	8.4%
Total Utilities	8.0%
Total FTE's	-2.0%
Total Personnel Costs	7.0%
Total Capital Expenditures	-15.9%
Total Debt Outstanding	-37.0%

Canadian Airports

- 10 Canadian airports submitted the FY2016 survey, down from 12 airports last year
- Strong passenger growth
- Large growth in cargo
- Strong growth in both rental car and terminal concessions revenues
- Parking revenue continued to grow on flat parking transactions
- No year over year change in capital expenses
- No change in outstanding debt

Total Operations	0.1%
Passenger Airline Operations	-0.1%
Cargo Airline Operations	53.6%
Total Landed Weights	-15.4%
Total Cargo Landed Weights	50.7%
Total Passengers	6.8%
Total Operating Revenue	5.1%
Total Non-Airline Revenue	7.9%
Total Terminal Concessions Revenue	11.1%
Total Rental Car Revenues	12.9%
Total Public Parking & Ground Transportation Revenue	6.0%
Total Parking Exit Transactions	0.1%
Total TNC Trips	NA
Total Operating Expenses	8.0%
Total Utilities	1.4%
Total FTE's	2.2%
Total Personnel Costs	7.5%
Total Capital Expenditures	0.2%
Total Debt Outstanding	0.0%



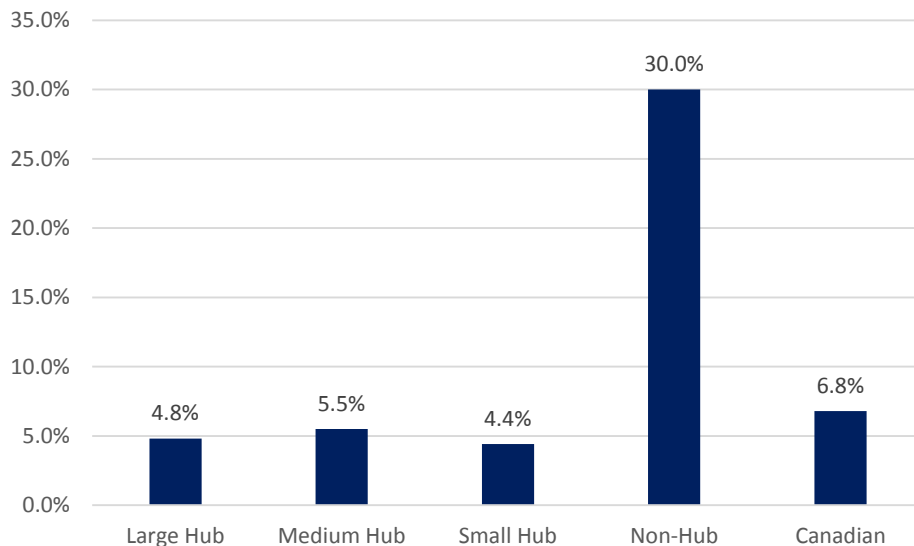
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ACI-NA Benchmarking Survey Results



FY2016 vs. FY2015 Selected Variables By Hub Type

Total Passengers

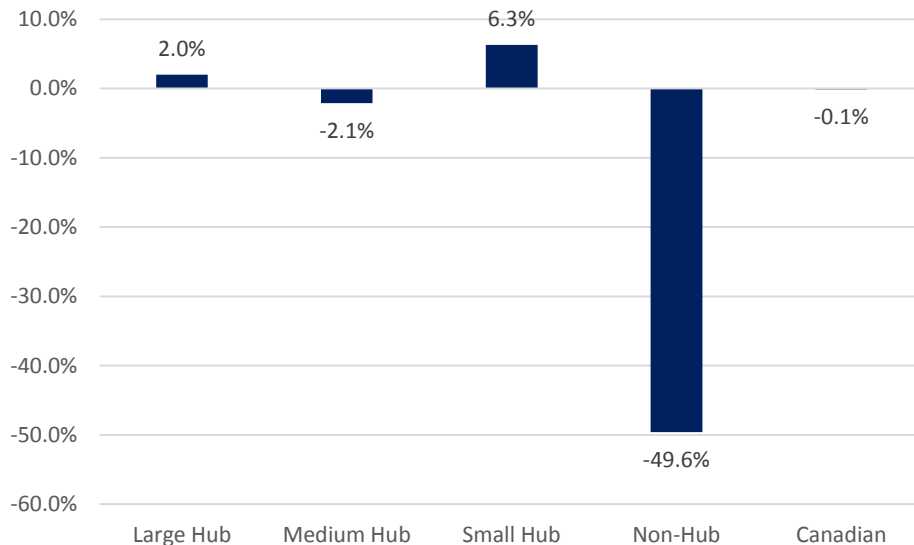


Large Hub Airports		Medium Hub Airports		Small Hub Airports	
Airport	% Change	Airport	% Change	Airport	% Change
PDX	9.2%	RDU	10.7%	COS	10.8%
FLL	8.7%	BNA	9.8%	MEM	10.2%
BWI	8.4%	OAK	8.0%	MSN	9.5%
BOS	8.0%	SNA	7.8%	BOI	9.4%
SEA	8.0%	CMH	7.8%	ALB	8.8%

Non-Hub Airports		Canadian Airports	
Airport	% Change	Airport	% Change
BTR	98.0%	YVR	9.7%
ROA	97.9%	YLW	8.7%
		YYZ	8.0%
		YUL	6.9%
		YWG	6.3%

- Strong passenger growth across the board
- Non-hub growth predominantly caused by changes at two airports

Total Passenger Airline Operations

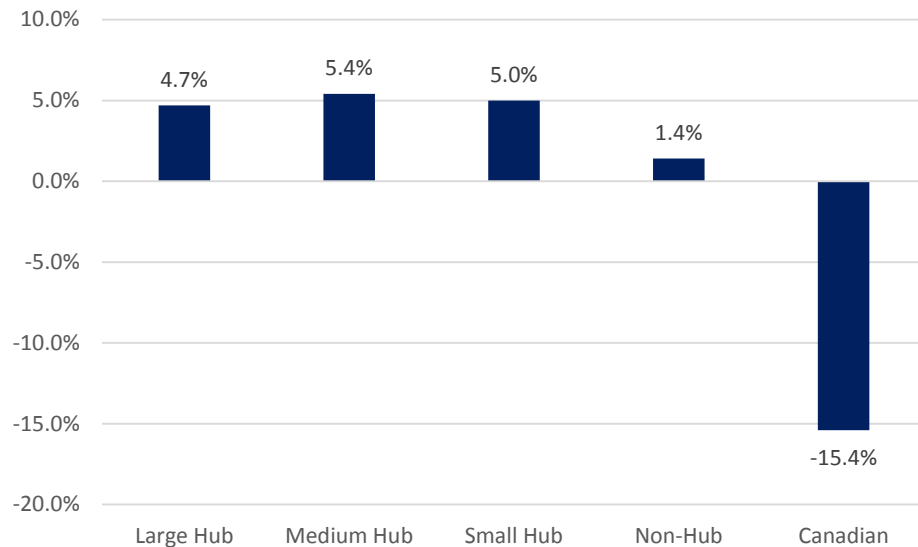


Large Hub Airports		Medium Hub Airports		Small Hub Airports	
Airport	% Change	Airport	% Change	Airport	% Change
SEA	8.1%	OMA	19.3%	DSM	117.1%
FLL	7.4%	SNA	10.0%	FAT	79.2%
PDX	6.6%	BNA	9.6%	SAV	17.7%
BOS	5.6%	IND	8.5%	TUS	14.9%
ATL	5.3%	MSY	6.1%	ALB	9.5%

Non-Hub Airports		Canadian Airports	
Airport	% Change	Airport	% Change
SBA	26.2%	YHZ	3.6%
		YUL	3.4%
		YYZ	2.9%
		YQB	0.2%

- Highest airline operations growth at the smaller airports
- Non-hub decline primarily due to changes at two airports

Total Landed Weights

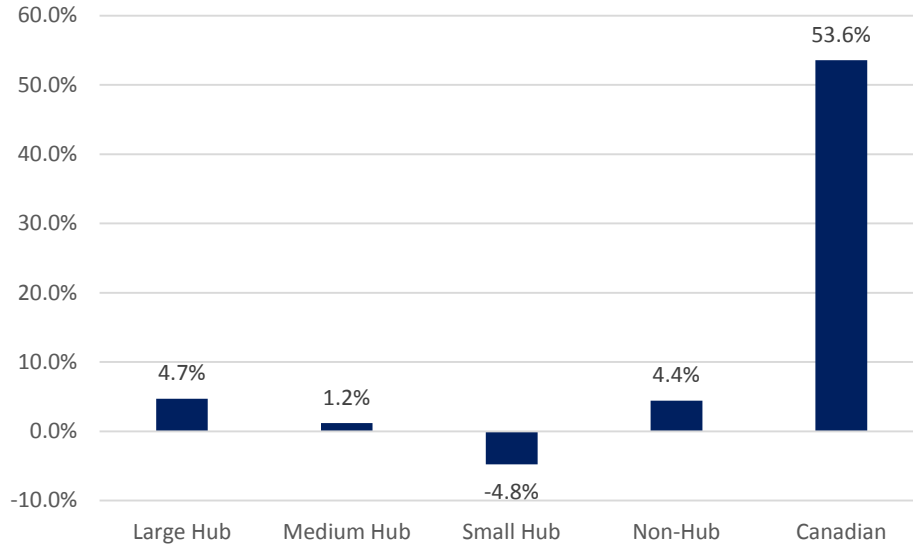


Large Hub Airports		Medium Hub Airports		Small Hub Airports	
Airport	% Change	Airport	% Change	Airport	% Change
SEA	10.2%	SNA	9.4%	FAT	17.2%
PDX	9.3%	OMA	8.9%	ALB	14.1%
BOS	9.0%	SJC	8.8%	SAV	9.1%
MCO	8.1%	RDU	8.5%	RNO	8.8%
DEN	7.9%	CMH	8.4%	BOI	8.7%

Non-Hub Airports		Canadian Airports	
Airport	% Change	Airport	% Change
SBA	5.9%	YLW	19.1%
TLH	1.7%	YXE	17.3%
		YHZ	11.5%
		YYZ	7.9%
		YWG	2.9%

- U.S. airports landed weight growth rates all within a narrow band

Total Cargo Operations

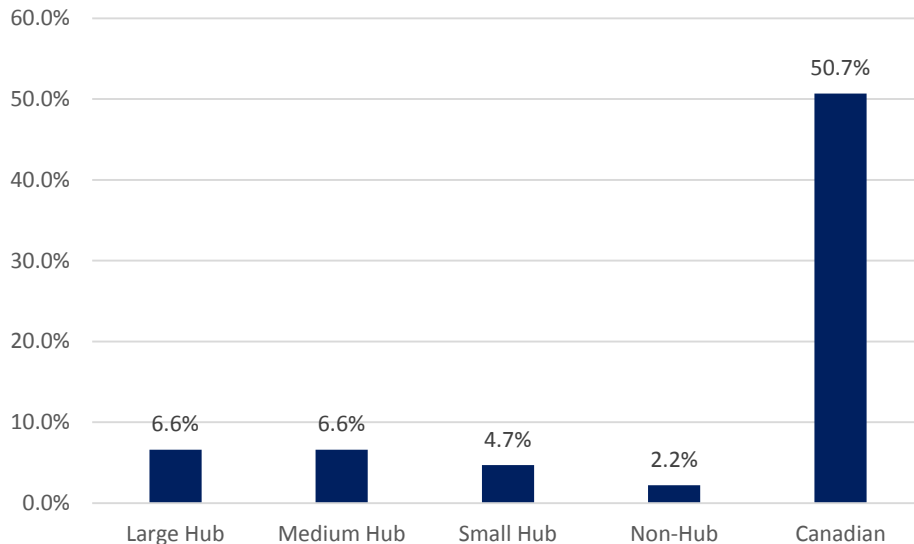


Large Hub Airports		Medium Hub Airports		Small Hub Airports	
Airport	% Change	Airport	% Change	Airport	% Change
DFW	124.4%	HOU	266.7%	ALB	13.0%
SAN	81.1%	MCI	101.1%	RNO	10.2%
CLT	38.9%	CVG	14.5%	SDF	5.3%
DTW	27.6%	MSY	13.8%	DSM	5.2%
SEA	27.0%	RSW	8.5%	MEM	3.8%

Non-Hub Airports		Canadian Airports	
Airport	% Change	Airport	% Change
ROA	126.4%	YVR	371.1%
		YXE	108.0%
		YYZ	100.1%
		YUL	31.5%

- Strong cargo growth at the larger U.S. and Canadian Airports
- Amazon is definitely a contributing factor to the cargo growth

Total Cargo Landed Weights

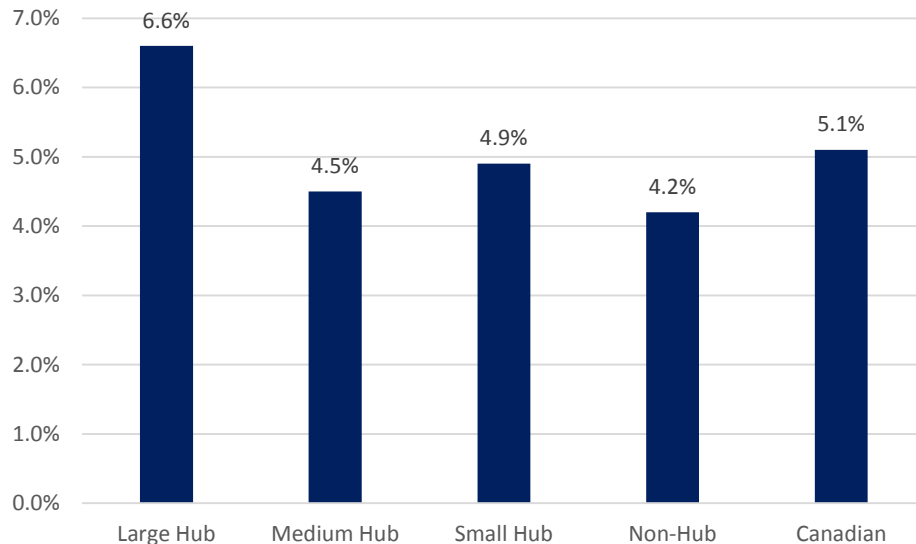


Large Hub Airports		Medium Hub Airports		Small Hub Airports	
Airport	% Change	Airport	% Change	Airport	% Change
TPA	43.2%	HOU	949.1%	FAT	74.7%
DTW	20.2%	MSY	37.6%	ALB	26.7%
SEA	18.9%	SJC	12.5%	RNO	22.7%
DFW	14.9%	RSW	11.6%	PNS	8.8%
MCO	14.0%	MKE	11.3%	SDF	6.1%

Non-Hub Airports		Canadian Airports	
Airport	% Change	Airport	% Change
SBA	6.8%	YVR	519.6%
ROA	2.8%	YXE	181.4%
		YHZ	103.7%
		YEG	24.3%

- Cargo landed weight increases across all airport groupings

Total Operating Revenues

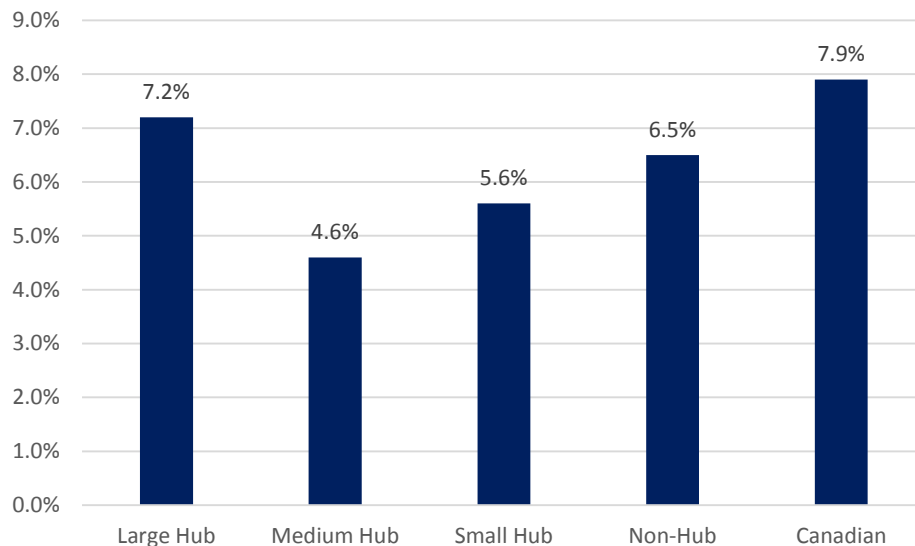


Large Hub Airports		Medium Hub Airports		Small Hub Airports	
Airport	% Change	Airport	% Change	Airport	% Change
DTW	15.7%	HOU	17.2%	COS	30.1%
LAX	15.5%	RDU	15.0%	ICT	16.9%
PDX	12.8%	AUS	13.2%	DSM	11.3%
ORD	12.5%	SJC	12.7%	BOI	11.2%
SAN	11.2%	OMA	8.9%	AVL	9.9%

Non-Hub Airports		Canadian Airports	
Airport	% Change	Airport	% Change
EFD	28.6%	YLV	12.5%
ROA	9.5%	YHZ	7.6%
BTR	5.8%	YUL	7.3%
		YYZ	6.9%
		YWG	5.9%

- Strong passenger growth resulted in strong revenue growth across all groupings

Total Non-Airline Revenues

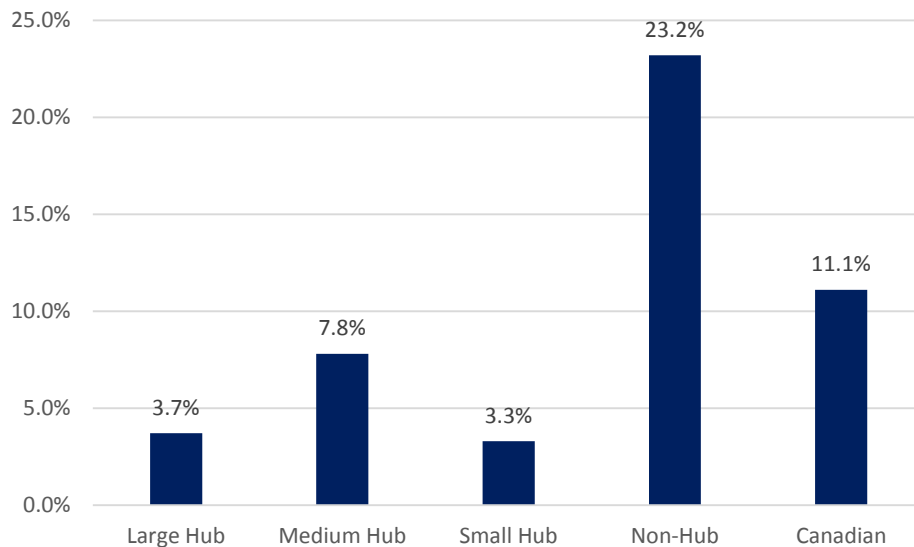


Large Hub Airports		Medium Hub Airports		Small Hub Airports	
Airport	% Change	Airport	% Change	Airport	% Change
DTW	31.3%	MSY	17.9%	COS	66.3%
SAN	18.5%	RDU	15.9%	ICT	18.7%
DEN	18.0%	AUS	15.1%	DSM	15.5%
FLL	17.1%	STL	10.7%	BOI	12.7%
PDX	15.8%	BNA	10.4%	ALB	9.5%

Non-Hub Airports		Canadian Airports	
Airport	% Change	Airport	% Change
EFD	28.4%	YQB	25.3%
ROA	11.4%	YLB	12.8%
BTR	10.6%	YYZ	9.7%
		YUL	9.4%
		YHZ	8.7%

- Non-Airline revenue growth was the primary driver of the overall increased revenue performance

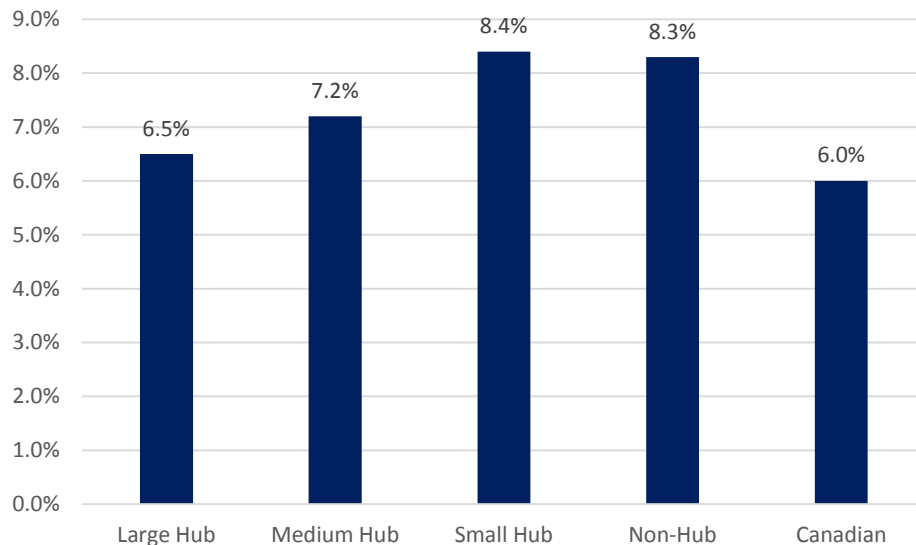
Total Terminal Concessions Revenues



Large Hub Airports		Medium Hub Airports		Small Hub Airports	
Airport	% Change	Airport	% Change	Airport	% Change
PHL	48.3%	BNA	17.5%	COS	18.1%
MSP	21.8%	OAK	16.6%	GEG	17.9%
CLT	18.3%	RDU	13.2%	ALB	11.6%
FLL	18.3%	MKE	12.1%	AVL	11.3%
BWI	13.7%	AUS	11.4%	LGB	11.2%

Non-Hub Airports		Canadian Airports	
Airport	% Change	Airport	% Change
ROA	155.2%	YQB	31.2%
TLH	30.1%	YUL	15.0%
TRI	2.6%	YVR	11.0%
		YYZ	11.0%
		YHZ	7.5%

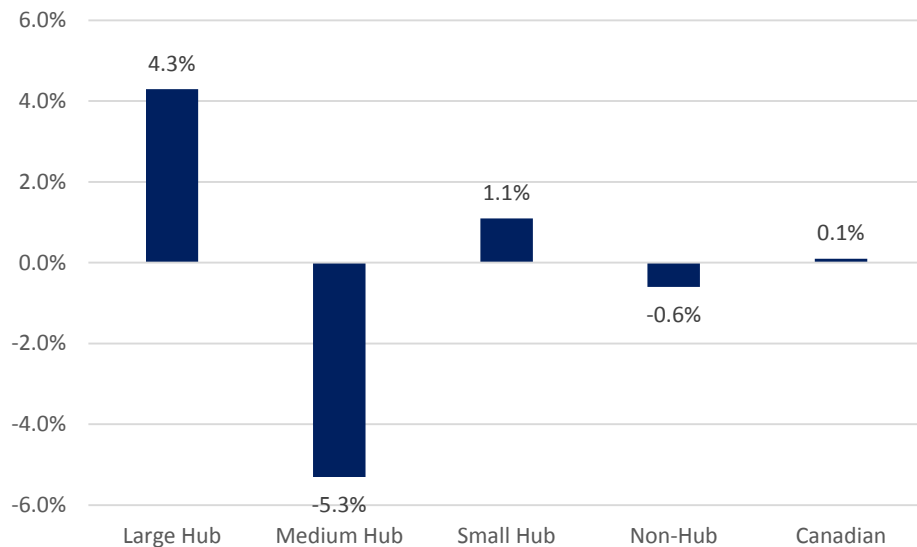
Total Parking & Ground Transportation Revenues



Large Hub Airports		Medium Hub Airports		Small Hub Airports	
Airport	% Change	Airport	% Change	Airport	% Change
LAX	19.2%	MSY	22.6%	ICT	85.9%
SAN	15.3%	RDU	19.3%	COS	21.0%
SEA	14.9%	STL	14.8%	ALB	15.8%
DCA	14.7%	OAK	13.8%	MEM	15.5%
MCO	13.3%	CVG	11.8%	SRQ	12.9%

Non-Hub Airports		Canadian Airports	
Airport	% Change	Airport	% Change
ROA	23.7%	YVR	14.1%
BTR	10.0%	YOW	12.0%
SBA	4.9%	YHZ	9.4%
		YUL	8.6%
		YLB	8.0%

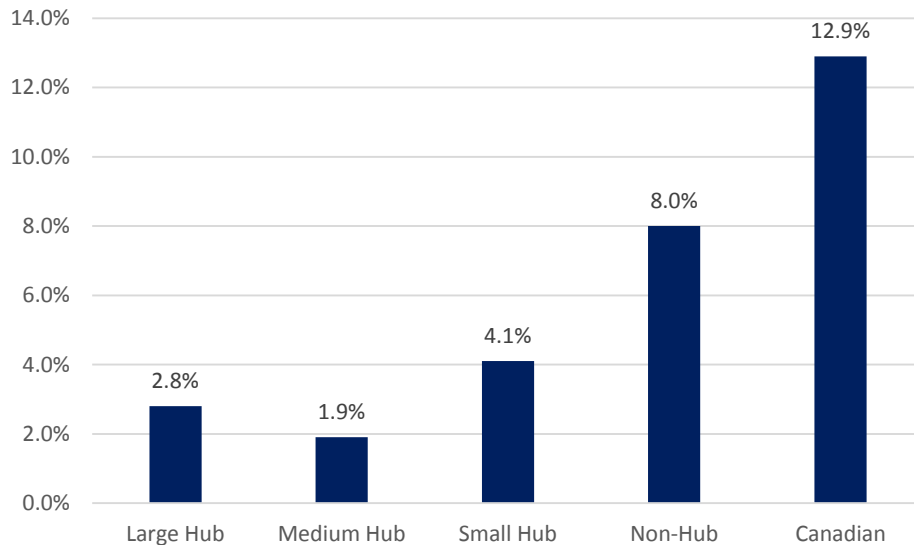
Total Parking Transactions



Large Hub Airports		Medium Hub Airports		Small Hub Airports	
Airport	% Change	Airport	% Change	Airport	% Change
CLT	13.6%	BUF	10.3%	SRQ	8.5%
BWI	10.5%	AUS	5.6%	COS	7.0%
PHL	5.7%	MCI	4.8%	MEM	6.1%
TPA	-2.2%	PIT	-16.4%	OKC	-2.4%
DCA	-2.6%	SAT	-19.6%	LGB	-10.8%

Non-Hub Airports		Canadian Airports	
Airport	% Change	Airport	% Change
TLH	-0.6%	YOW	3.4%
		YWG	3.3%
		YHZ	-1.3%
		YQB	-1.6%
		YEG	-2.3%

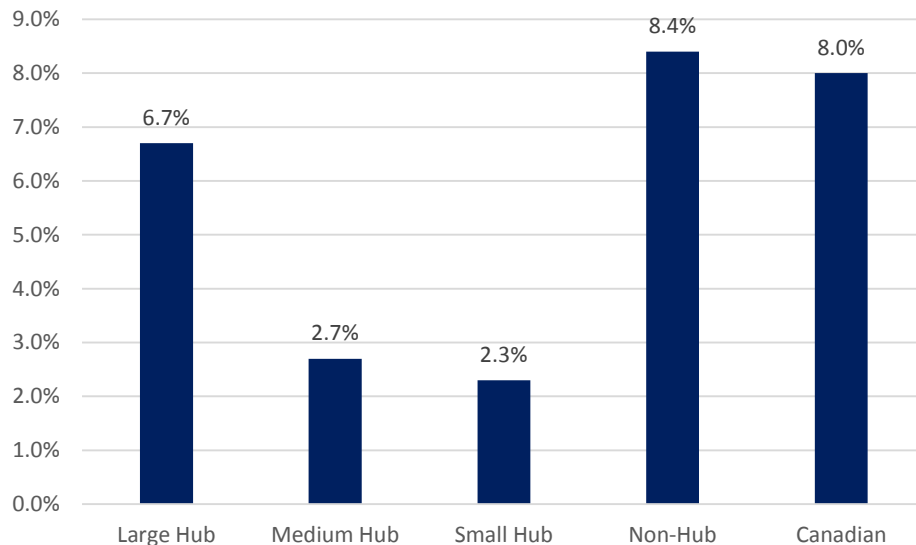
Total Rental Car Revenues



Large Hub Airports		Medium Hub Airports		Small Hub Airports	
Airport	% Change	Airport	% Change	Airport	% Change
JFK	17.4%	RDU	12.9%	MHT	14.2%
SAN	16.2%	BNA	10.0%	MEM	14.1%
SLC	12.7%	SMF	8.3%	BOI	11.3%
CLT	11.3%	SJC	6.4%	GEG	11.1%
SEA	9.5%	OMA	5.5%	ORF	8.8%

Non-Hub Airports		Canadian Airports	
Airport	% Change	Airport	% Change
BTR	32.8%	YYZ	21.0%
TRI	2.6%	YVR	14.1%
TLH	1.9%	YUL	11.3%
		YHZ	9.8%
		YQB	9.7%

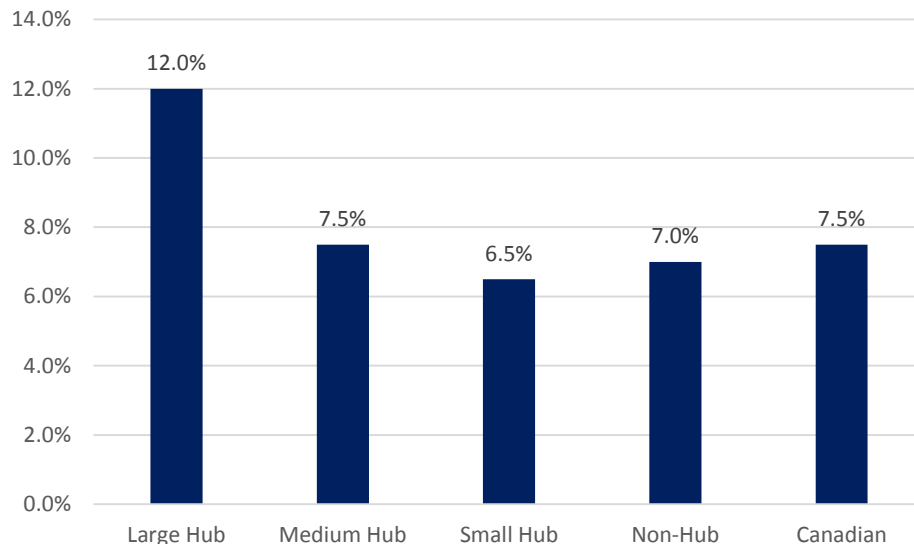
Total Operating Expenses



Large Hub Airports		Medium Hub Airports		Small Hub Airports	
Airport	% Change	Airport	% Change	Airport	% Change
DCA	-1.0%	BUF	-3.4%	SDF	-12.2%
BOS	0.0%	OAK	-3.2%	MHT	-5.2%
IAD	0.5%	MCI	-1.1%	COS	-5.0%
DFW	1.8%	SNA	0.3%	ICT	-3.9%
JFK	1.9%	STL	0.8%	ORF	-2.1%

Non-Hub Airports		Canadian Airports	
Airport	% Change	Airport	% Change
SBA	1.6%	YEG	0.1%
TLH	5.6%	YXE	2.4%
TRI	5.7%	YHZ	2.8%
		YWG	3.6%
		YQB	4.1%

Total Personnel Expenses

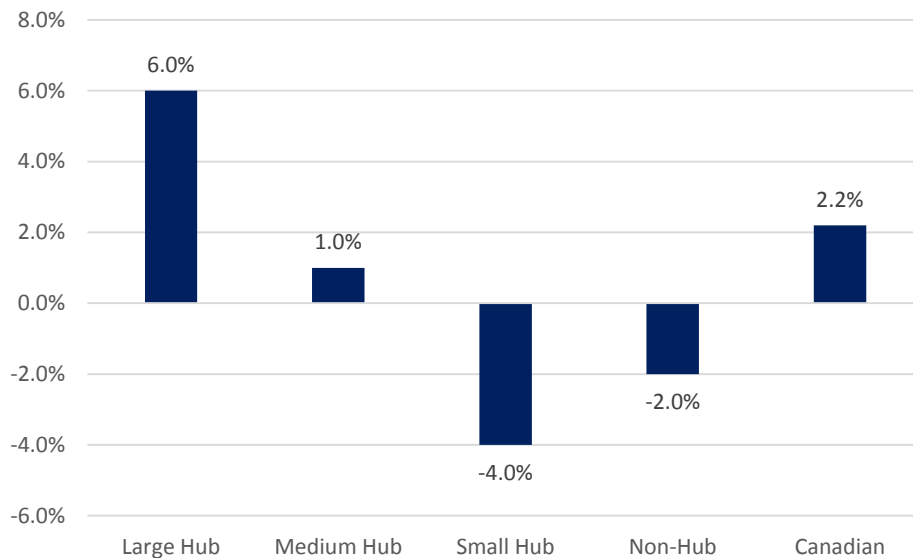


Large Hub Airports		Medium Hub Airports		Small Hub Airports	
Airport	% Change	Airport	% Change	Airport	% Change
MSP	16.6%	PIT	17.7%	PNS	17.1%
CLT	13.0%	HOU	17.0%	LGB	14.8%
PHX	12.6%	AUS	16.7%	SAV	12.6%
FLL	11.7%	SAT	16.7%	JAN	11.3%
DEN	11.2%	CMH	15.1%	IWA	11.2%

Non-Hub Airports		Canadian Airports	
Airport	% Change	Airport	% Change
TLH	14.5%	YYZ	11.8%
BTR	13.7%	YLB	10.9%
ROA	7.3%	YHZ	7.8%
		YVR	7.3%
		YXE	7.3%

- Personnel expense increases were significant across all airport groupings
- Medical costs, pension costs, State retirement contributions?

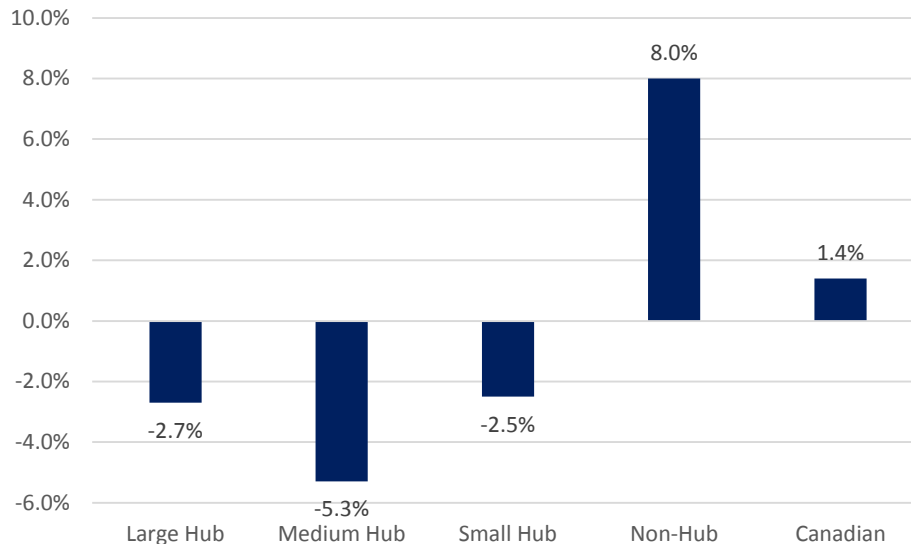
Total FTE Headcount



Large Hub Airports		Medium Hub Airports		Small Hub Airports	
Airport	% Change	Airport	% Change	Airport	% Change
MCO	109.5%	MKE	20.6%	CAE	12.5%
BOS	50.9%	CMH	9.5%	JAN	8.5%
SAN	13.0%	MSY	7.4%	BOI	6.9%
DTW	8.4%	RDU	-11.4%	TUS	-9.6%
IAH	-6.4%	PIT	-17.6%	ICT	-15.5%

Non-Hub Airports		Canadian Airports	
Airport	% Change	Airport	% Change
SBA	-8.1%	YLW	17.9%
		YVR	6.7%
		YYZ	4.3%
		YWG	4.2%
		YQB	-4.4%

Total Utilities

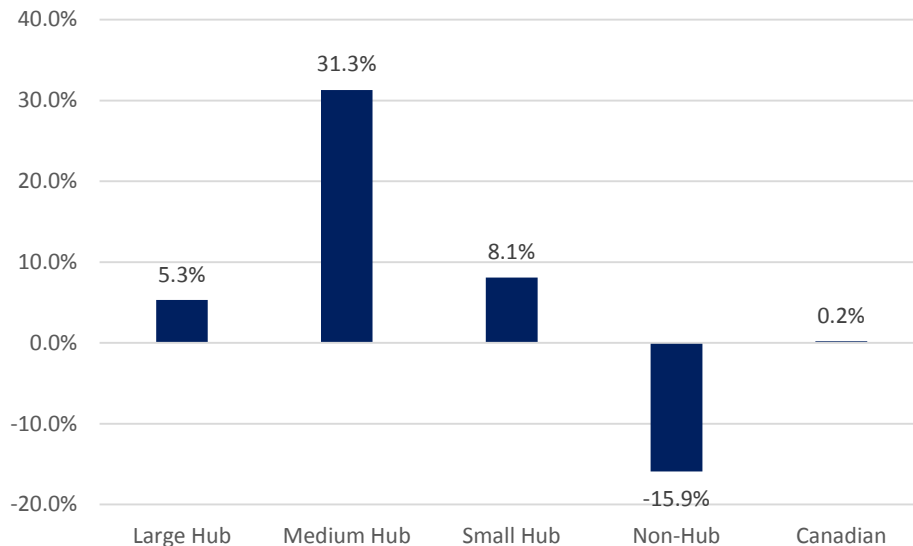


Large Hub Airports		Medium Hub Airports		Small Hub Airports	
Airport	% Change	Airport	% Change	Airport	% Change
PHX	-16.8%	MCI	-21.9%	COS	-15.3%
EWB	-16.3%	BUF	-19.4%	ALB	-12.1%
LGA	-9.8%	MKE	-15.7%	RNO	-11.8%
DFW	-9.4%	SNA	-9.3%	SAV	-7.8%
DTW	-9.0%	STL	-7.7%	MSN	-7.8%

Non-Hub Airports		Canadian Airports	
Airport	% Change	Airport	% Change
TLH	-3.3%	YWG	2.0%
SBA	-0.9%	YUL	1.6%
		YHZ	-1.1%
		YEG	-4.0%
		YQB	-6.1%

- Lower cost of fuel resulted in lower utility costs for airports across the U.S.
- Increased instances of renewable energy across the industry

Total Capital Expenditures

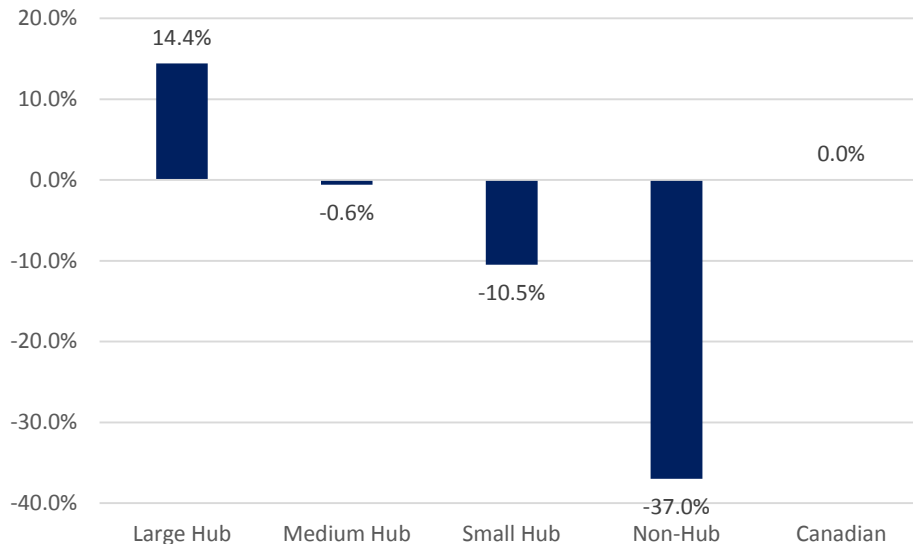


Large Hub Airports		Medium Hub Airports		Small Hub Airports	
Airport	% Change	Airport	% Change	Airport	% Change
MCO	133.8%	MSY	354.7%	PNS	1427.2%
MIA	102.6%	SMF	181.6%	FAT	166.7%
IAH	54.9%	RDU	141.5%	MHT	148.4%
SAN	-41.6%	MKE	-45.7%	BOI	-57.2%
JFK	-70.6%	CVG	-69.3%	JAN	-80.8%

Non-Hub Airports		Canadian Airports	
Airport	% Change	Airport	% Change
EFD	98.5%	YQB	102.2%
TRI	75.1%	YLB	67.6%
ROA	42.9%	YHZ	46.6%
BTR	-42.4%	YOW	-20.9%
		YVR	-21.9%

- Capital programs increased significantly across all of the larger U.S. airport groups, but especially within the Medium Hub category

Total Debt Outstanding



Large Hub Airports		Medium Hub Airports		Small Hub Airports	
Airport	% Change	Airport	% Change	Airport	% Change
PDX	-18.0%	PIT	-23.7%	CAE	-97.8%
PHX	-9.9%	CVG	-20.6%	HSV	-35.0%
IAH	-9.5%	PBI	-17.9%	PNS	-33.4%
IAD	-5.8%	MSY	-10.5%	MSN	-30.1%
SEA	-5.4%	CMH	-9.8%	COS	-19.0%

Non-Hub Airports		Canadian Airports	
Airport	% Change	Airport	% Change
BTR	-96.9%	YYZ	-1.1%
TRI	-11.5%	YOW	-0.5%
EFD	-10.5%	YHZ	0.0%
		YUL	0.1%
		YVR	0.2%

- Total debt increased by 9.6% year over year, primarily driven by large issuances by the large hub airports

YOY Per Unit Benchmarking Analysis

- “Once you have seen one airport.....you have seen one airport”
- The real benefit from benchmarking comes from unit-level analysis
- Per passenger, per operation, per employee, per square foot

	Large Hub	Medium Hub	Small Hub	Non-Hub	Canadian
Revenue Per Employee	2.7%	4.2%	3.0%	-1.4%	6.4%
Terminal Concessions Sales per Enplaned Passenger	-16.3%	-3.6%	8.0%	0.4%	90.9%
Concessions Income to Airport Per Enplaned Passenger	3.7%	9.4%	-1.2%	-0.3%	11.0%
Rental Car Revenue Per Passenger	5.8%	-8.0%	-7.5%	-0.4%	-17.0%
Parking & Ground Transportation Revenue Per Enplaned Passenger	-0.8%	-2.8%	1.3%	3.9%	9.3%
Parking Transactions Per Enplaned Passenger	-6.3%	6.7%	-10.6%	4.6%	37.8%
Passengers Per Passenger Airline Operation	9.1%	6.6%	12.5%	4.9%	157.9%
Capital Expenditures Per Passenger	32.0%	0.0%	19.2%	-13.1%	-16.9%
Landed Weight Per Commercial Operation	3.9%	24.7%	14.8%	8.6%	101.0%
Fixed Rate Debt as a Percentage of Total Debt	-0.1%	-0.4%	-0.2%	10.9%	0.4%
Airline Revenue as a Percentage of Total Revenue	-3.3%	-10.3%	-0.1%	-2.0%	-4.7%
Non-Airline Revenue as a Percentage of Total Revenue	2.6%	10.3%	0.0%	0.7%	2.2%



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

ACI-NA Benchmarking Survey Results

FY2016 Rankings

2016 Benchmarking Top Performers

Non-Airline Revenue Percentage of Total Revenue

Large Hub Airports			Medium Hub Airports		Small Hub Airports		Non-Hub Airports		Canadian Airports	
Ranking	Airport Code	NARev Percentage	Airport Code	NARev Percentage	Airport Code	NARev Percentage	Airport Code	NARev Percentage	Airport Code	NARev Percentage
1	TPA	70.9%	PBI	70.9%	COS	71.0%	ROA	59.9%	YLW	59.6%
2	ATL	70.4%	BNA	67.2%	BOI	69.1%	SBA	57.4%	YVR	58.3%
3	MCO	61.9%	DAL	67.2%	PNS	68.3%	BTR	56.3%	YEG	51.2%
4	FLL	61.3%	CMH	65.9%	GSP	66.8%	TRI	52.1%	YQB	50.5%
5	SLC	61.1%	MCI	65.3%	OKC	65.7%	TLH	50.0%	YOW	47.4%
6	MSP	58.5%	RDU	63.7%	SAV	64.0%				
7	PHX	58.4%	IND	63.3%	MSN	64.0%				
8	CLT	56.4%	MKE	60.8%	ELP	63.6%				
9	DFW	53.3%	CVG	57.7%	GEG	62.2%				
10	PDX	52.8%	AUS	57.4%	JAN	61.1%				

2016 Benchmarking Top Performers

Non-Airline Revenue Per Enplaned Passenger

Large Hub Airports			Medium Hub Airports		Small Hub Airports		Non-Hub Airports		Canadian Airports	
Ranking	Airport Code	Non-Airline Rev Per EP	Airport Code	Non-Airline Rev Per EP	Airport Code	Non-Airline Rev Per EP	Airport Code	Non-Airline Rev Per EP	Airport Code	Non-Airline Rev Per EP
1	ORD	\$24.46	IND	\$27.21	MEM	\$41.63	SBA	\$37.44	YYZ	\$35.69
2	IAD	\$21.50	SMF	\$18.65	HSV	\$38.53	AGS	\$37.17	YQB	\$21.96
3	BOS	\$19.73	OAK	\$18.40	SDF	\$30.70	BTR	\$27.07	YUL	\$19.17
4	EWR	\$18.52	CVG	\$18.15	COS	\$27.05	ROA	\$21.39	YEG	\$18.68
5	MIA	\$17.99	CMH	\$17.49	MHT	\$25.60	TRI	\$20.58	YVR	\$18.28
6	JFK	\$17.90	SJC	\$17.02	ICT	\$24.63				
7	SFO	\$17.17	PBI	\$16.62	IWA	\$23.76				
8	TPA	\$16.03	RDU	\$16.56	ALB	\$23.73				
9	PDX	\$15.75	PIT	\$16.36	JAN	\$23.39				
10	LAX	\$15.01	MCI	\$16.26	CAE	\$23.13				

2016 Benchmarking Top Performers

Parking & Ground Transportation Revenue

Large Hub Airports			Medium Hub Airports		Small Hub Airports		Non-Hub Airports		Canadian Airports	
Ranking	Airport Code	P> Revenue	Airport Code	P> Revenue	Airport Code	P> Revenue	Airport Code	P> Revenue	Airport Code	P> Revenue
1	DEN	\$187,542,360	RDU	\$57,658,171	MEM	\$17,302,000	BTR	\$3,359,090	YYZ	\$140,387,752
2	BOS	\$174,604,387	SMF	\$56,392,661	SDF	\$16,354,620	ROA	\$3,262,774	YUL	\$64,062,430
3	DFW	\$156,634,227	MCI	\$52,578,719	MHT	\$15,849,692	TLH	\$2,712,185	YVR	\$38,209,919
4	SFO	\$136,594,085	IND	\$50,561,863	ORF	\$15,517,174	SBA	\$2,660,056	YEG	\$32,893,805
5	ATL	\$134,529,060	BNA	\$44,918,960	ALB	\$15,163,022	AGS	\$2,627,008	YOW	\$16,306,048
6	LAX	\$129,686,534	SNA	\$43,100,987	DSM	\$12,408,848				
7	EWB	\$105,151,278	AUS	\$40,322,190	OKC	\$10,581,064				
8	MSP	\$102,034,935	OAK	\$36,826,283	RNO	\$10,519,785				
9	JFK	\$99,955,058	CMH	\$34,869,380	GEG	\$10,239,323				
10	SEA	\$91,672,949	SJC	\$33,815,060	BOI	\$10,107,176				

Parking & Ground Transportation Revenue Per Parking Space

Large Hub Airports			Medium Hub Airports		Small Hub Airports		Non-Hub Airports		Canadian Airports	
Ranking	Airport Code	P> Revenue Per Parking Space	Airport Code	P> Revenue Per Parking Space	Airport Code	P> Revenue Per Parking Space	Airport Code	P> Revenue Per Parking Space	Airport Code	P> Revenue Per Parking Space
1	LGA	\$13,337	SJC	\$5,688	DSM	\$2,902	SBA	\$2,418	YYZ	\$7,902
2	BOS	\$7,849	HOU	\$5,620	JAN	\$2,877	BTR	\$2,055	YWG	\$6,083
3	DCA	\$6,859	OAK	\$4,510	RNO	\$2,795	TRI	\$1,874	YUL	\$5,849
4	SFO	\$6,723	SNA	\$4,358	SDF	\$2,669	ROA	\$1,762	YVR	\$5,073
5	EWB	\$6,676	IND	\$3,436	SRQ	\$2,435	AGS	\$1,627	YXE	\$3,667
6	JFK	\$6,601	SMF	\$3,332	LGB	\$2,390				
7	SAN	\$6,482	BNA	\$3,318	ALB	\$2,362				
8	MIA	\$6,311	AUS	\$2,842	BOI	\$2,341				
9	LAX	\$5,610	RDU	\$2,725	MEM	\$2,253				
10	SEA	\$5,096	CMH	\$2,686	FAT	\$2,175				

2016 Benchmarking Top Performers

Rental Car Income

	Large Hub Airports		Medium Hub Airports		Small Hub Airports		Non-Hub Airports		Canadian Airports	
Ranking	Airport Code	Rental Car Income	Airport Code	Rental Car Income	Airport Code	Rental Car Income	Airport Code	Rental Car Income	Airport Code	Rental Car Income
1	MCO	\$99,627,290	RSW	\$20,610,956	MEM	\$9,776,000	BTR	\$2,253,394	YYZ	\$28,662,030
2	LAX	\$83,299,616	SJC	\$19,888,704	RNO	\$8,451,565	TLH	\$2,010,160	YVR	\$18,993,219
3	SFO	\$72,112,767	MCI	\$16,981,061	SDF	\$7,785,048	AGS	\$1,799,433	YUL	\$12,470,015
4	DEN	\$66,726,918	RDU	\$16,742,662	OKC	\$6,358,186	SBA	\$1,619,897	YHZ	\$7,061,950
5	MIA	\$51,642,482	SMF	\$16,270,771	ORF	\$6,273,670	ROA	\$1,377,531	YEG	\$6,671,162
6	DFW	\$47,014,538	SNA	\$15,913,171	TUS	\$6,114,720				
7	PHX	\$42,492,486	OAK	\$14,646,803	GSP	\$5,450,033				
8	EWB	\$38,872,929	AUS	\$14,639,818	GEG	\$5,327,207				
9	ATL	\$38,811,959	BNA	\$13,241,548	BOI	\$5,299,688				
10	BOS	\$37,702,257	PBI	\$13,206,435	ALB	\$5,057,259				



Rental Car Income per Deplaned Passenger

	Large Hub Airports		Medium Hub Airports		Small Hub Airports		Non-Hub Airports		Canadian Airports	
Ranking	Airport Code	Rental Car Income Per DP	Airport Code	Rental Car Income Per DP	Airport Code	Rental Car Income Per DP	Airport Code	Rental Car Income Per DP	Airport Code	Rental Car Income Per DP
1	MCO	\$4.80	RSW	\$4.76	SRQ	\$7.46	AGS	\$6.45	YHZ	\$3.61
2	TPA	\$3.87	PBI	\$4.16	AVL	\$5.84	BTR	\$6.04	YLW	\$2.50
3	SAN	\$3.06	SJC	\$3.91	GSP	\$5.44	TLH	\$5.74	YXE	\$2.43
4	SFO	\$2.81	SMF	\$3.29	MEM	\$4.97	SBA	\$5.15	YQB	\$1.94
5	PDX	\$2.66	MCI	\$3.24	COS	\$4.88	ROA	\$4.64	YEG	\$1.90
6	FLL	\$2.43	MKE	\$3.19	FAT	\$4.85				
7	MIA	\$2.33	SNA	\$3.08	RNO	\$4.75				
8	DEN	\$2.29	CMH	\$3.03	SDF	\$4.64				
9	BOS	\$2.17	RDU	\$2.98	PNS	\$4.63				
10	LAX	\$2.14	BUF	\$2.77	JAN	\$4.53				

2016 Benchmarking Top Performers

Food &
Beverage
Income

	Large Hub Airports		Medium Hub Airports		Small Hub Airports		Non-Hub Airports		Canadian Airports	
Ranking	Airport Code	F&B Income	Airport Code	F&B Income	Airport Code	F&B Income	Airport Code	F&B Income	Airport Code	F&B Income
1	ATL	\$50,518,728	DAL	\$7,957,618	LGB	\$1,582,118	BTR	\$175,000	YYZ	\$20,404,756
2	LAX	\$46,285,524	AUS	\$7,226,017	BOI	\$1,326,031	TLH	\$131,499	YUL	\$11,917,920
3	DEN	\$33,727,852	HOU	\$7,091,900	TUS	\$1,256,294	SBA	\$123,937	YVR	\$10,517,888
4	DFW	\$30,935,361	SNA	\$6,073,845	ORF	\$1,223,908			YEG	\$3,853,646
5	CLT	\$26,351,740	SJC	\$5,444,230	SDF	\$1,195,091			YWG	\$1,756,915
6	SFO	\$24,905,124	STL	\$5,409,096	GEG	\$1,085,380				
7	MCO	\$24,205,985	BNA	\$5,224,181	MEM	\$1,027,000				
8	MIA	\$22,570,420	OAK	\$4,972,747	OKC	\$1,001,229				
9	SEA	\$21,314,355	RDU	\$4,661,619	RNO	\$992,984				
10	MSP	\$21,043,955	SMF	\$4,231,983	DSM	\$802,663				



Food &
Beverage
Income Per
Enplaned
Passenger

	Large Hub Airports		Medium Hub Airports		Small Hub Airports		Non-Hub Airports		Canadian Airports	
Ranking	Airport Code	F&B Inc. Per EP	Airport Code	F&B Inc. Per EP	Airport Code	F&B Inc. Per EP	Airport Code	F&B Inc. Per EP	Airport Code	F&B Inc. Per EP
1	TPA	\$1.49	SNA	\$1.17	LGB	\$1.19	BTR	\$0.47	YUL	\$1.44
2	DCA	\$1.35	AUS	\$1.17	BOI	\$0.83	TRI	\$0.41	YEG	\$1.10
3	IAD	\$1.33	HOU	\$1.11	MSN	\$0.81	SBA	\$0.39	YVR	\$0.94
4	PHL	\$1.31	SJC	\$1.07	ORF	\$0.78			YYZ	\$0.92
5	LAX	\$1.19	MKE	\$1.03	TUS	\$0.78			YWG	\$0.88
6	CLT	\$1.18	DAL	\$1.02	SDF	\$0.71				
7	MCO	\$1.17	IND	\$0.96	PNS	\$0.68				
8	DEN	\$1.16	SMF	\$0.86	GEG	\$0.67				
9	MSP	\$1.12	OAK	\$0.86	DSM	\$0.65				
10	FLL	\$1.08	BNA	\$0.85	SAV	\$0.62				

2016 Benchmarking Top Performers

Retail
Income

	Large Hub Airports		Medium Hub Airports		Small Hub Airports		Non-Hub Airports		Canadian Airports	
Ranking	Airport Code	Retail Income	Airport Code	Retail Income	Airport Code	Retail Income	Airport Code	Retail Income	Airport Code	Retail Income
1	JFK	\$35,487,946	DAL	\$4,587,610	OKC	\$1,271,167	BTR	\$143,796	YVR	\$57,952,568
2	LAX	\$30,236,577	STL	\$4,354,959	RNO	\$978,926	ROA	\$97,811	YYZ	\$27,673,721
3	EWB	\$29,337,922	SNA	\$3,685,120	SDF	\$892,159	SBA	\$68,614	YUL	\$5,154,229
4	ATL	\$24,927,004	MSY	\$3,492,402	BOI	\$846,422			YEG	\$3,521,373
5	DFW	\$21,070,960	SJC	\$3,420,680	SAV	\$802,083			YOW	\$1,783,854
6	MIA	\$20,241,294	AUS	\$3,183,058	ORF	\$792,569				
7	MCO	\$15,149,263	HOU	\$3,164,746	ALB	\$787,075				
8	PHL	\$13,999,922	SAT	\$3,132,851	MEM	\$729,000				
9	SFO	\$13,842,475	RSW	\$3,038,338	TUS	\$679,767				
10	CLT	\$13,535,912	PBI	\$2,977,574	ELP	\$643,984				



Retail
Income Per
Enplaned
Passenger

	Large Hub Airports		Medium Hub Airports		Small Hub Airports		Non-Hub Airports		Canadian Airports	
Ranking	Airport Code	Retail Inc. Per EP	Airport Code	Retail Inc. Per EP	Airport Code	Retail Inc. Per EP	Airport Code	Retail Inc. Per EP	Airport Code	Retail Inc. Per EP
1	EWB	\$1.45	PBI	\$0.94	COS	\$0.76	BTR	\$0.39	YVR	\$5.21
2	JFK	\$1.21	SAT	\$0.73	SAV	\$0.74	ROA	\$0.33	YYZ	\$1.25
3	MIA	\$0.91	SNA	\$0.71	OKC	\$0.68	SBA	\$0.22	YEG	\$1.00
4	PHL	\$0.89	RSW	\$0.70	SRQ	\$0.59			YHZ	\$0.76
5	IAD	\$0.83	SJC	\$0.67	ALB	\$0.56			YOW	\$0.75
6	LAX	\$0.78	STL	\$0.65	RNO	\$0.55				
7	PDX	\$0.77	MSY	\$0.63	SDF	\$0.53				
8	MCO	\$0.73	PIT	\$0.62	BOI	\$0.53				
9	DFW	\$0.64	IND	\$0.59	MSN	\$0.53				
10	DTW	\$0.63	DAL	\$0.59	GSP	\$0.51				

2016 Benchmarking Top Performers

Operating Revenue Per Employee

Large Hub Airports			Medium Hub Airports		Small Hub Airports		Non-Hub Airports		Canadian Airports	
Ranking	Airport Code	Operating Rev Per FTE	Airport Code	Operating Rev Per FTE	Airport Code	Operating Rev Per FTE	Airport Code	Operating Rev Per FTE	Airport Code	Operating Rev Per FTE
1	JFK	\$2,913,572	OAK	\$747,175	DSM	\$623,031	SBA	\$281,089	YYZ	\$885,305
2	EWB	\$2,452,557	SJC	\$467,911	MHT	\$568,537	BTR	\$192,149	YVR	\$718,789
3	LGA	\$1,349,353	RDU	\$464,633	OKC	\$435,486	TLH	\$160,692	YUL	\$533,107
4	ORD	\$709,922	MSY	\$456,417	PNS	\$429,285			YOW	\$394,465
5	PDX	\$647,199	SMF	\$450,652	MEM	\$349,229			YWG	\$393,420
6	DEN	\$588,942	PBI	\$441,204	MSN	\$325,972				
7	DTW	\$539,458	IND	\$387,860	LGB	\$292,842				
8	SEA	\$523,937	BNA	\$385,483	HSV	\$292,186				
9	CLT	\$466,020	AUS	\$363,008	BOI	\$286,628				
10	BOS	\$456,765	HOU	\$330,277	CAE	\$285,936				

2016 Benchmarking Top Performers

Airline Cost Per Enplanement

	Large Hub Airports			Medium Hub Airports			Small Hub Airports			Non-Hub Airports			Canadian Airports	
Ranking	Airport Code	Cost Per		Airport Code	Cost Per		Airport Code	Cost Per		Airport Code	Cost Per		Airport Code	Cost Per
		Enplanement			Enplanement			Enplanement			Enplanement			Enplanement
1	ATL	\$2.38		PBI	\$3.97		IWA	\$1.89		ROA	\$6.82		YLW	\$7.34
2	CLT	\$3.19		DAL	\$3.97		BOI	\$4.45		AGS	\$8.65		YXE	\$10.74
3	FLL	\$3.94		BNA	\$5.27		COS	\$5.67		TRI	\$10.17		YVR	\$11.52
4	SLC	\$4.03		CVG	\$6.90		GEG	\$5.93		SBA	\$13.47		YEG	\$13.58
5	TPA	\$5.02		OMA	\$6.92		SDF	\$5.99		TLH	\$13.95		YHZ	\$15.53
6	PHX	\$5.71		MSY	\$7.18		ALB	\$6.00						
7	MSP	\$6.27		CMH	\$7.23		ELP	\$6.43						
8	MCO	\$7.70		RDU	\$7.28		OKC	\$6.44						
9	DFW	\$9.50		RSW	\$7.85		GSP	\$6.49						
10	BWI	\$9.51		HOU	\$7.86		RNO	\$7.60						



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

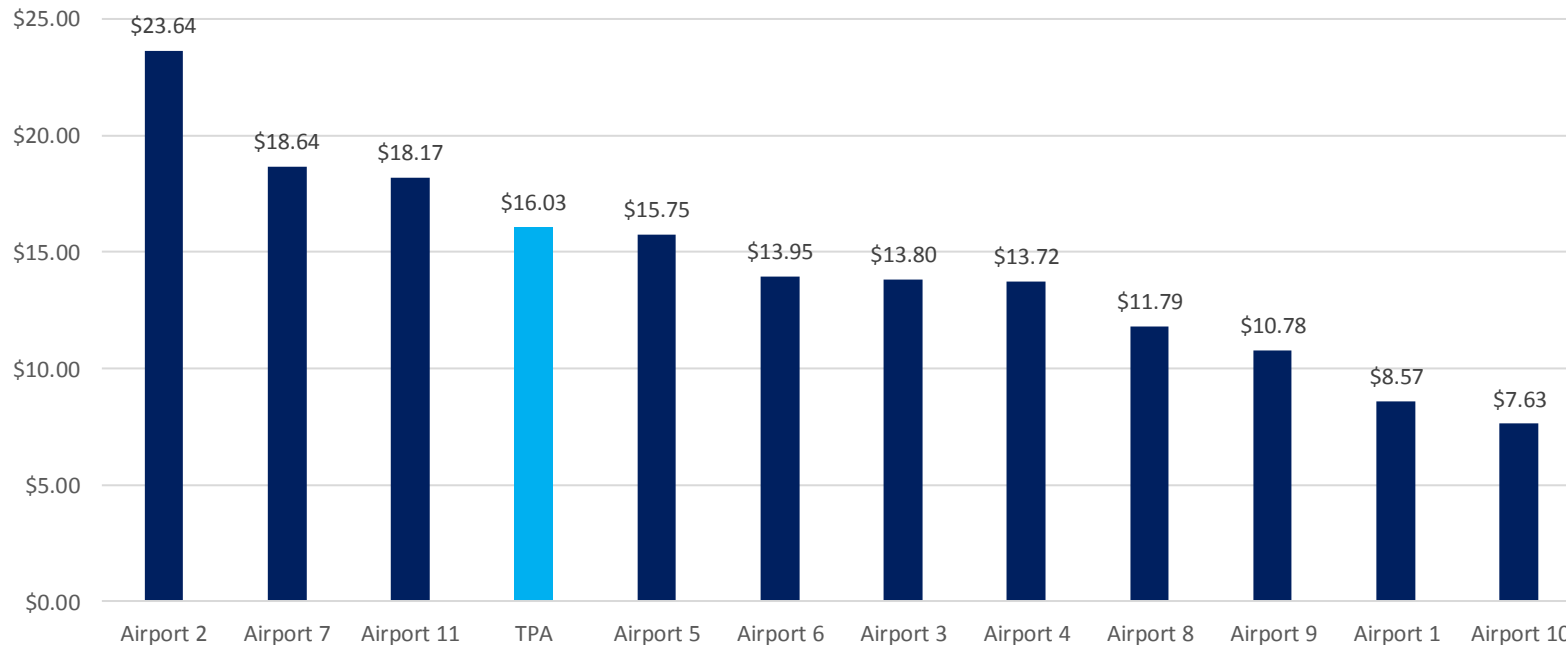
ACI-NA Benchmarking Survey Results



Benchmarking Examples

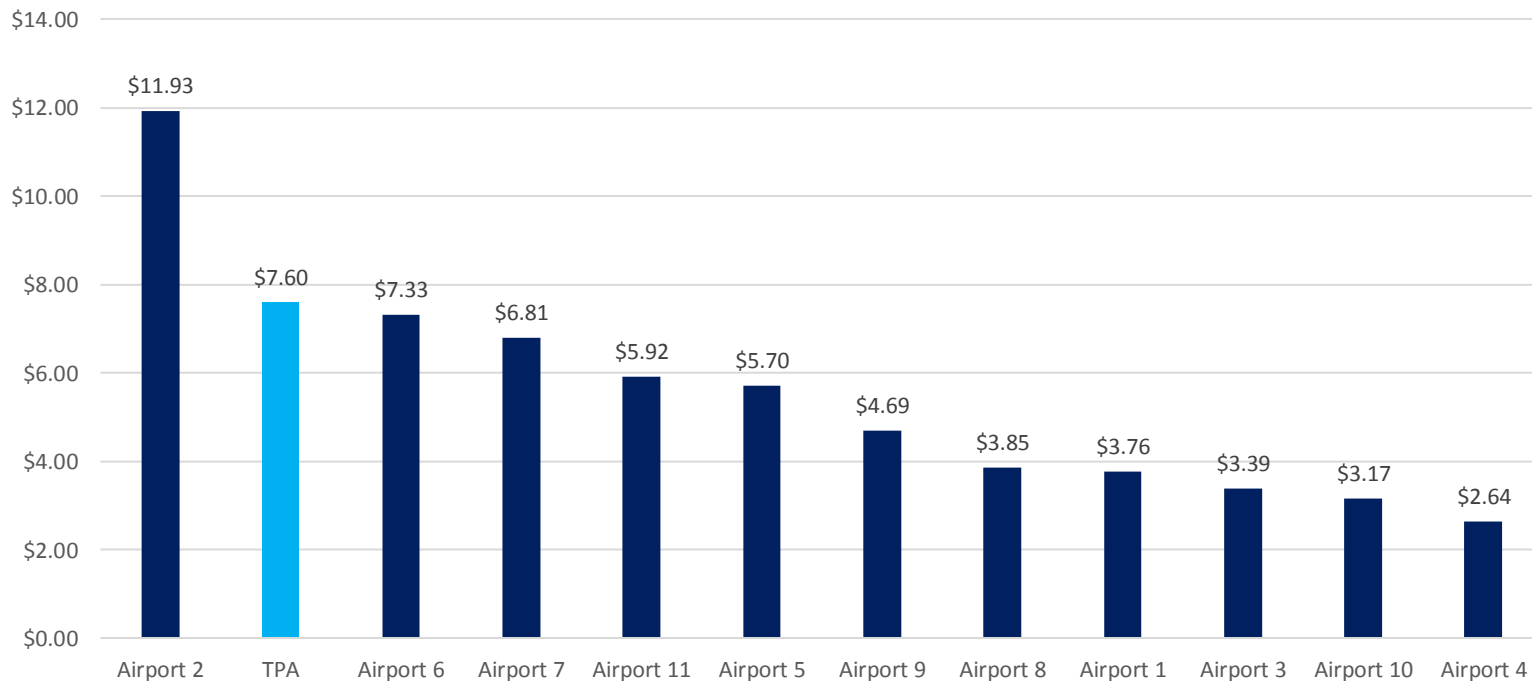
FY2016 TPA Benchmarking Examples

Non-Airline Operating Revenue Per Enplanement



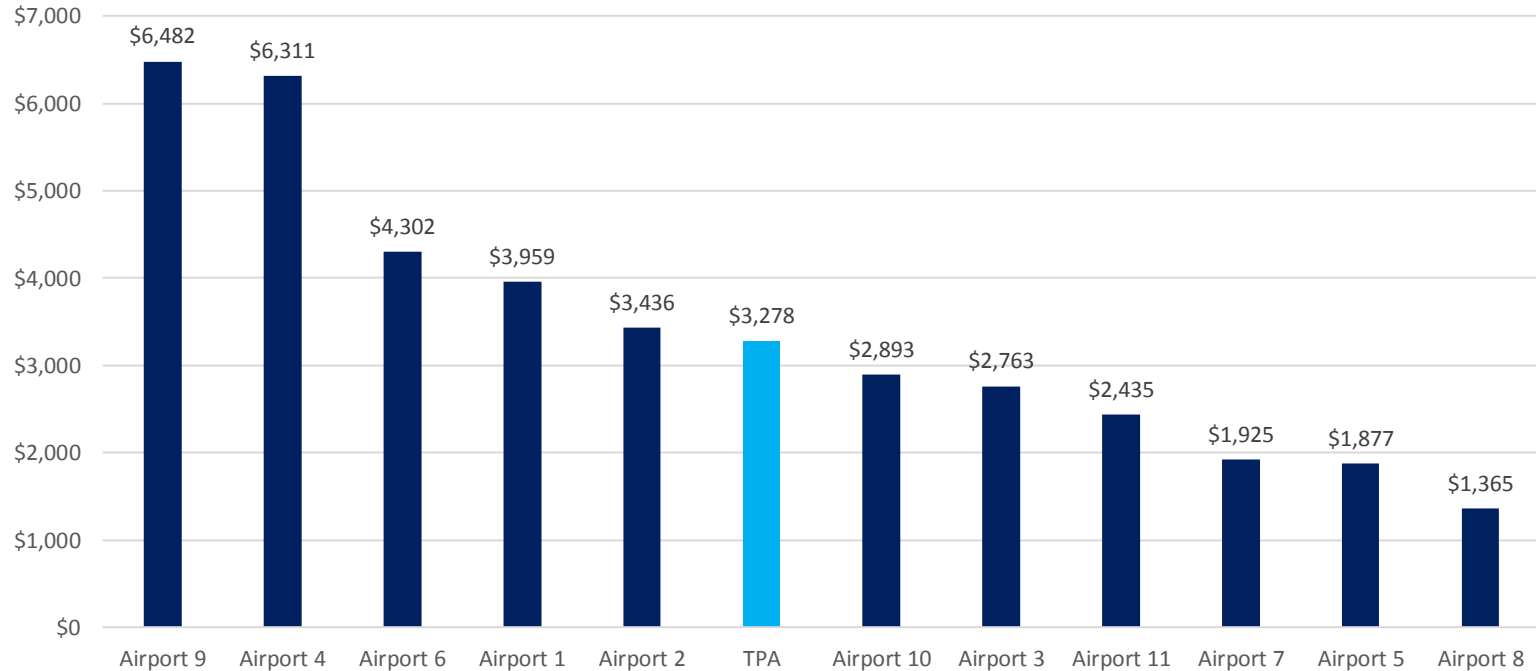
FY2016 TPA Benchmarking Examples

Total Public Parking & Ground Transportation Revenue Per Enplanement



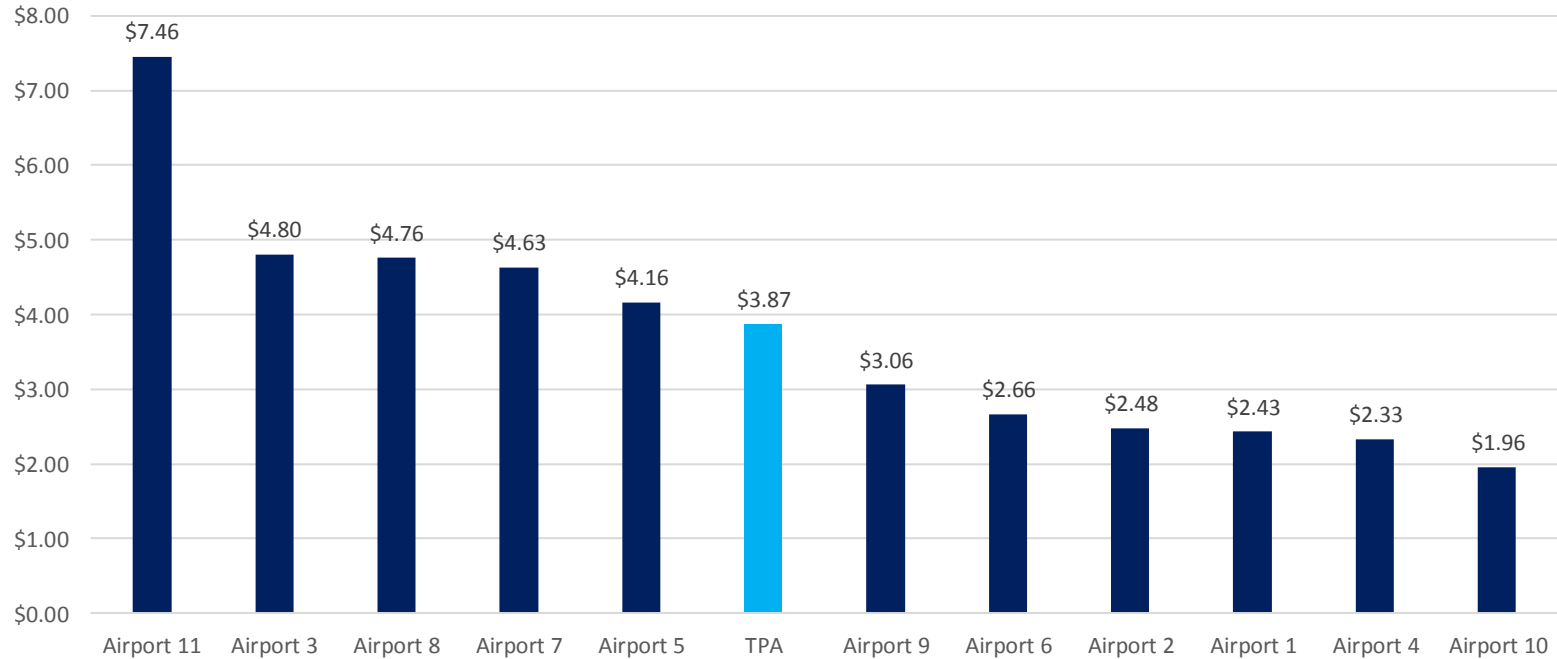
FY2016 TPA Benchmarking Examples

On Airport Parking Revenue per Parking Space



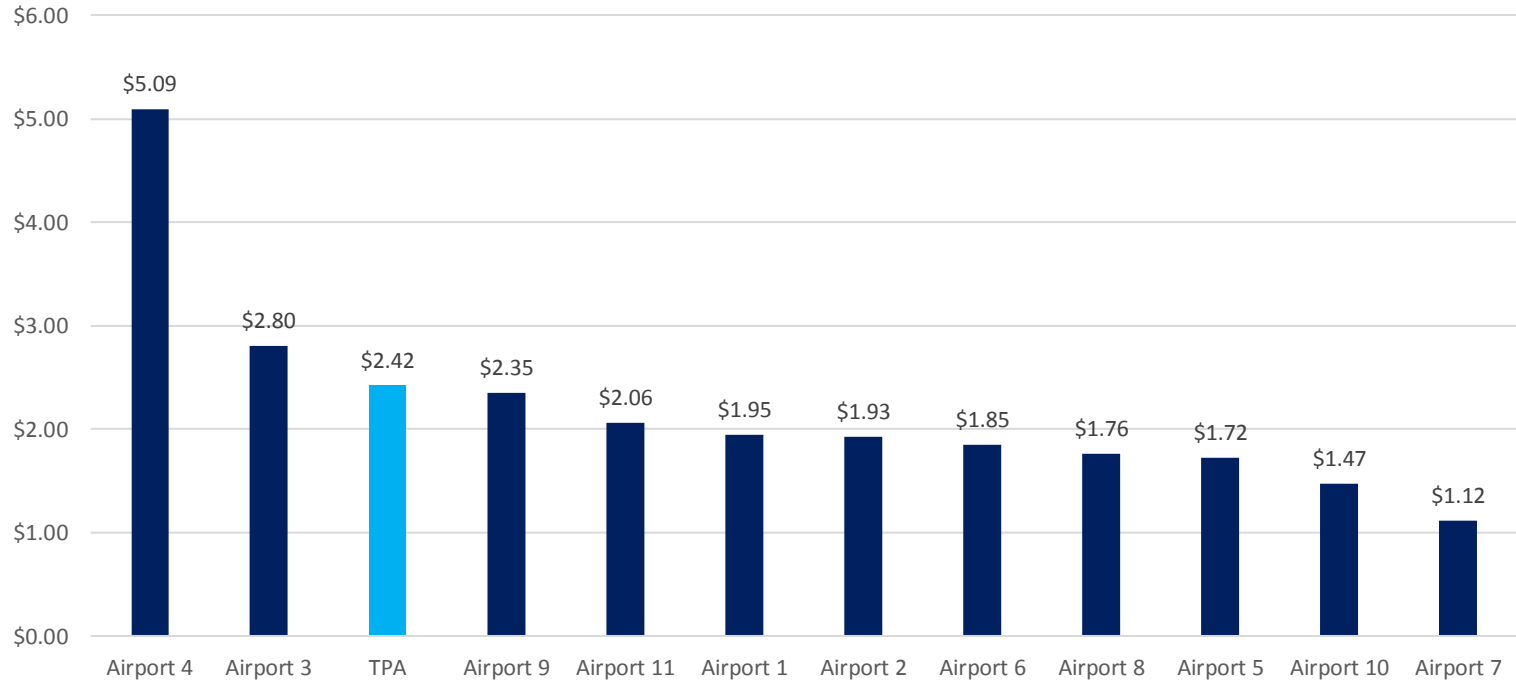
FY2016 TPA Benchmarking Examples

Total Rental Car Revenue Per Deplanement



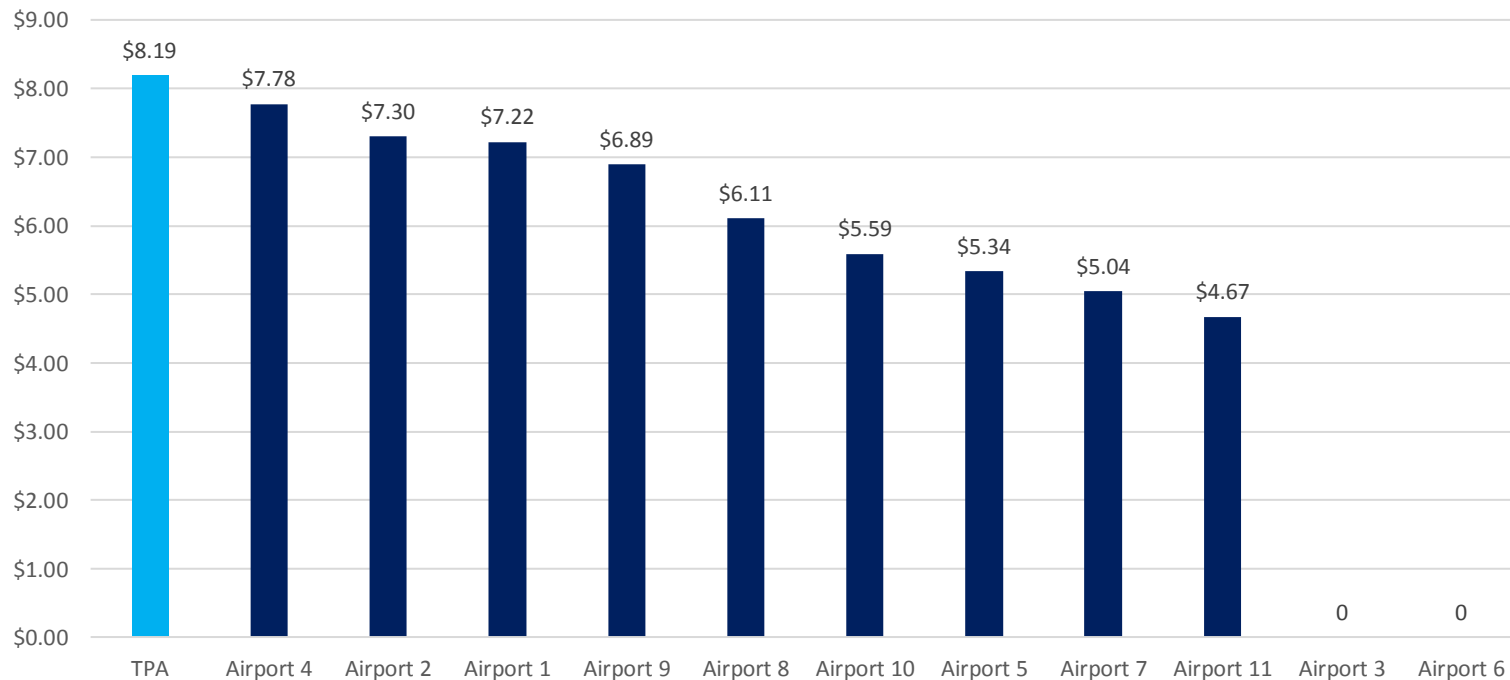
FY2016 TPA Benchmarking Examples

Total Concessions Revenue Per Enplanement



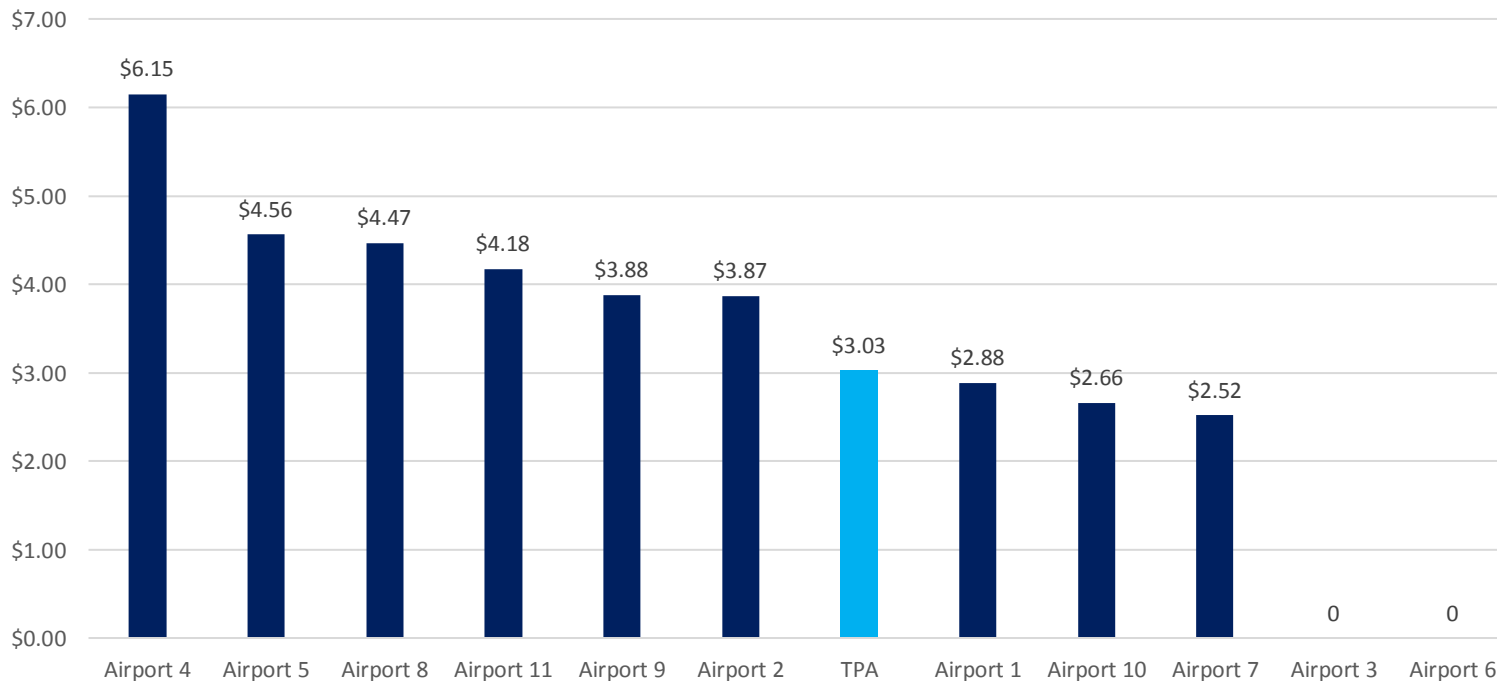
FY2016 TPA Benchmarking Examples

Food and Beverage-Sales per Enplanement



FY2016 TPA Benchmarking Examples

Retail - Sales per Enplanement

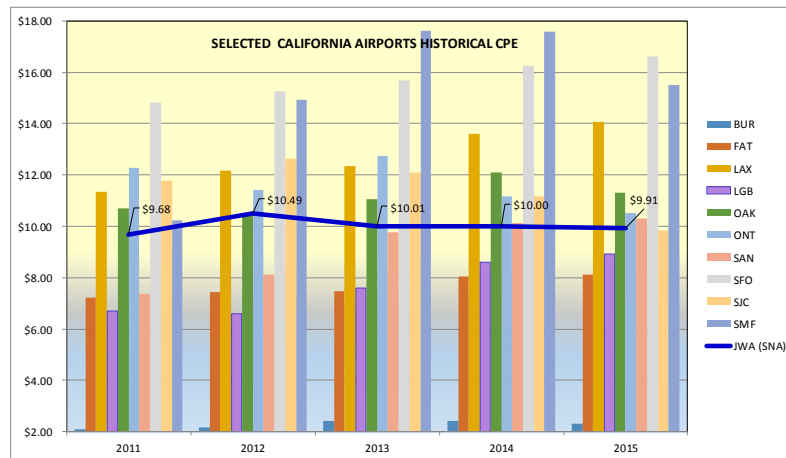


Benchmarking Examples – SNA

- John Wayne Airport (SNA) performs periodic comparative analysis of peer airports broken out into several different groupings
 - Medium hub
 - (OAK, RDU, SMF, SJM, etc.)
 - California Airports
 - (OAK, LAX, LGB, FAT, SFO, SJC, SMF, etc.)
 - Southern California Airports
 - (LGB, LAX, BUR, SAN, etc.)
- Finance is the predominant user of the Benchmarking data within the airport
- Benchmarking reports are primarily utilized for in-house analysis

SELECTED CALIFORNIA AIRPORTS' HISTORICAL CPE

	2011	2012	2013	2014	2015	2015 EPAX	6-Yr Avg
BUR	\$2.09	\$2.16	\$2.42	\$2.40	\$2.32	1,953,558	\$2.23
FAT	\$7.22	\$7.44	\$7.47	\$8.06	\$8.12	704,461	\$7.62
JWA (SNA)	\$9.68	\$10.49	\$10.01	\$10.00	\$9.91	4,792,579	\$10.03
LAX	\$11.33	\$12.16	\$12.34	\$13.59	\$14.07	36,114,325	\$12.41
LGB	\$6.71	\$6.61	\$7.61	\$8.60	\$8.93	1,276,679	\$7.13
OAK	\$10.71	\$10.50	\$11.07	\$12.09	\$11.32	5,374,187	\$10.72
ONT	\$12.28	\$11.42	\$12.73	\$11.17	\$10.51	2,085,482	\$12.41
SAN	\$7.36	\$8.10	\$9.78	\$10.11	\$10.29	9,713,066	\$8.35
SFO	\$14.81	\$15.24	\$15.69	\$16.26	\$16.60	24,023,599	\$15.43
SJC	\$11.79	\$12.64	\$12.11	\$11.17	\$9.82	4,765,001	\$11.31
SMF	\$10.23	\$14.93	\$17.62	\$17.59	\$15.50	4,628,597	\$13.81
Lowest	\$2.09	\$2.16	\$2.42	\$2.40	\$2.32	704,461	\$2.23
Highest	\$14.81	\$15.24	\$17.62	\$17.59	\$16.60	36,114,325	\$15.98
Median	\$10.23	\$10.50	\$11.07	\$11.17	\$10.29	4,765,001	\$10.37



Benchmarking Examples - SNA

- Typical benchmarking analysis includes;
 - Enplanement trends and CPE comparison
 - Cost Analysis
 - Security Costs (Comparison to % of Operating Costs)
 - Maintenance Costs
 - Compare to others to track rising operating costs
 - Parking revenue and TNC
 - Parking revenue declines and TNC effect on them
 - Staff sizing of security unit
 - Compare and analyze FAA Form 127 Operating and Financial Summary
 - Aeronautical vs Non-Aeronautical Revenue
 - Operating Expense
 - Capital Expenditure and CIP
 - Unrestricted Cash
 - Concessions Gross Receipts and Income

Benchmarking at SAT

Syed Mehdi

Chief Strategy & Development Officer



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Context

- San Antonio International Airport (SAT)
 - Medium Hub Airport
 - 4.5m/4.3m (+4.6%) (2017/16) enplanements
 - 160,776/164,211 (-2.1%) (2017/16) aircraft operations



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How do we use benchmarking?

- How do we use benchmarking?
- Data sources
- Challenges and work around
- We benchmark enplaned passengers, aircraft operations against neighboring airports and airports with similar passenger enplanements
 - RSW, PIT, CLE, IND, AUS, DAL, HOU

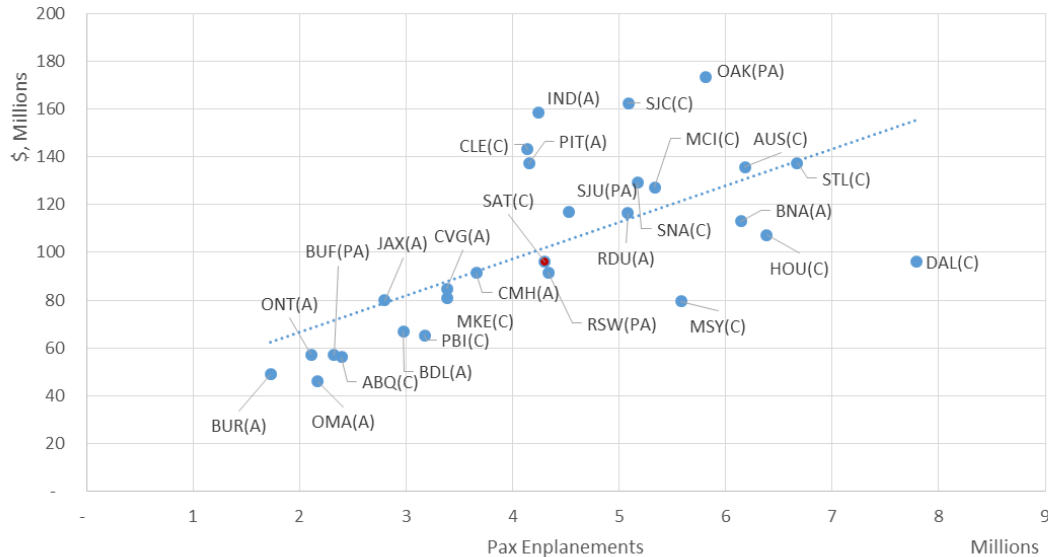


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Benchmarking at SAT

Total Operating Revenue - Pax Enplanements 2016



- Operating Revenues at SAT are below the trend line
- Operating Revenue are also below peer airports with similar number of enplanements
- Drill Down



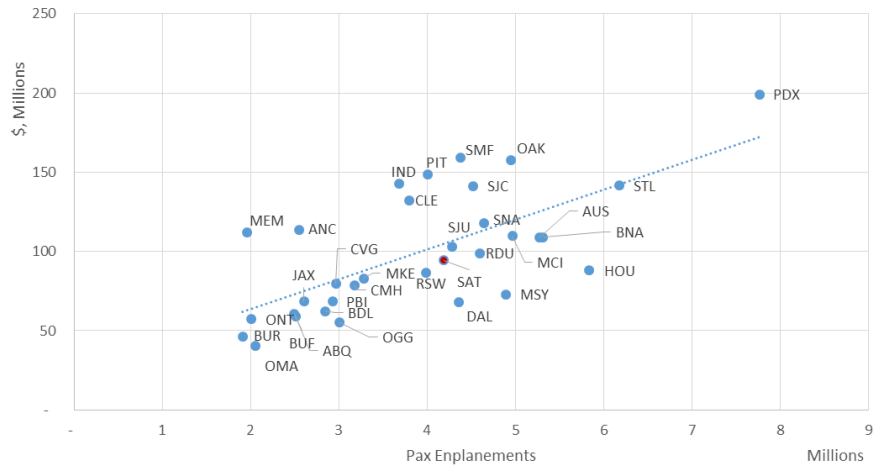
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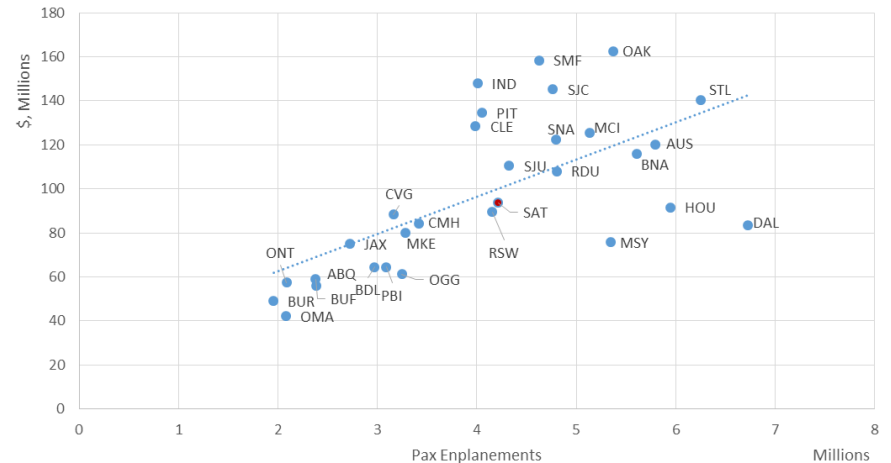
Benchmarking at SAT

- Is this a historical trend?

Total Operating Revenue - Pax Enplanements 2014



Total Operating Revenue - Pax Enplanements 2015

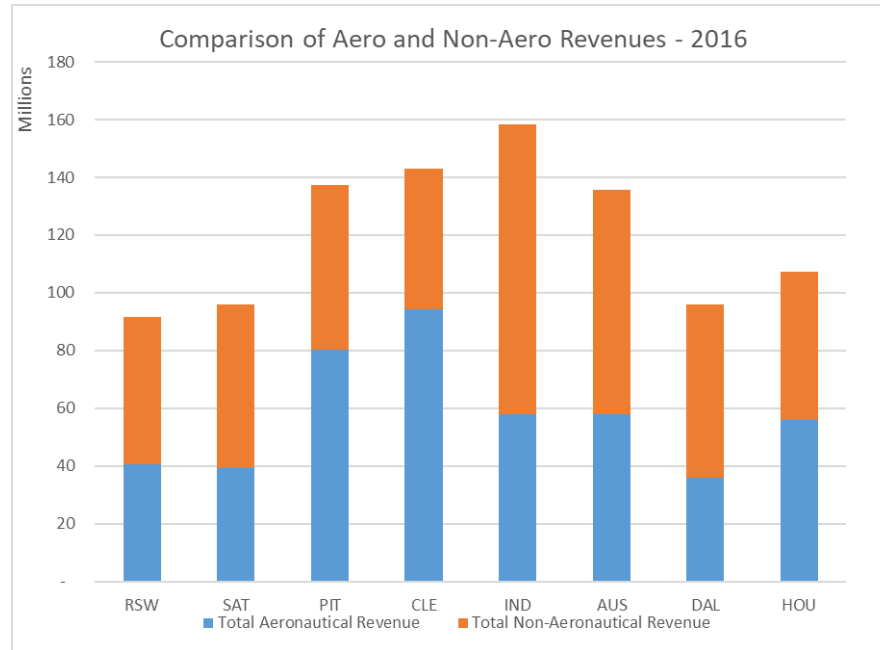


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Benchmarking at SAT

- Drill down to analyze further



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Benchmarking at SAT

- Drill down to analyze further

LOC_ID	RSW	SAT	PIT	CLE	IND	AUS	DAL	HOU
Airport Name	SOUTHWEST FLORID	SAN ANTONIO INTL	PITTSBURGH INTERN	CLEVELAND-HOPKIN	INDIANAPOLIS INTL	AUSTIN-BERGSTROM	DALLAS LOVE FIELD	WILLIAM P HOBBY
Airport_ID_GovS	RSW(PA)	SAT(C)	PIT(A)	CLE(C)	IND(A)	AUS(C)	DAL(C)	HOU(C)
Enplanements	4,332,997	4,302,119	4,151,628	4,139,182	4,239,828	6,180,464	7,787,496	6,383,347
Annual aircraft operations	79,444	267,010	141,630	118,653	162,211	192,010	223,997	203,367
Passenger airline landing fees	11,933,243	8,414,207	11,676,558	37,200,000	9,615,141	21,839,018	18,199,585	14,791,741
Terminal arrival fees - rents - utilities	23,003,270	18,419,603	39,344,398	43,992,141	31,358,509	22,464,986	15,006,788	32,506,584
Terminal area apron charges/tiedowns	2,599,732	3,497,766	1,470,708	-	1,894,273	6,780,406	-	2,901,292
Federal Inspection Fees	-	1,789,386	571,250	355,222	-	691,056	-	-
Other passenger aeronautical fees	(3,534,426)	1,863,939	16,260,051	-	-	-	-	-
Total Passenger Airline Aeronautical Revenue	34,001,819	33,984,901	69,322,965	81,525,113	42,867,923	51,775,466	33,206,373	50,199,617
Landing fees from cargo	355,082	1,409,314	1,108,368	3,146,023	10,601,365	1,796,414	-	1,475
Landing fees from GA and military	102,904	-	685,581	2,253,204	-	63,704	-	-
FBO revenue - contract or sponsor-operated	630,264	2,200,475	455,061	795,227	-	1,335,713	-	3,656,617
Cargo and hangar rentals	1,218,317	782,055	7,591,997	5,742,259	2,896,773	760,165	-	876,777
Aviation fuel tax retained for airport use	-	-	-	-	-	-	-	-
Fuel sales net profit/loss or fuel flowage fees	2,297,146	638,228	586,186	239,526	307,510	694,517	1,253,598	975,802
Security reimbursement from Federal Government	-	-	368,269	615,205	-	578,933	487,781	110,000
Other non-passenger aeronautical revenue	1,953,348	303,978	164,438	-	1,330,844	849,686	812,665	-
Total Non-Passenger Aeronautical Revenue	6,557,061	5,334,050	10,959,900	12,791,444	15,136,492	6,079,132	2,554,044	5,620,671
Total Aeronautical Revenue	40,558,880	39,318,951	80,282,865	94,316,557	58,004,415	57,854,598	35,760,417	55,820,288
Land and non-terminal facility leases and revenues	4,913,420	4,843,561	2,228,599	408,251	-	372,490	6,673,749	1,212,549
Terminal-food and beverage	3,646,517	3,387,171	2,483,376	1,706,967	4,079,353	7,226,017	7,957,618	7,091,900
Terminal-retail stores and duty free	3,038,338	3,671,585	2,572,280	1,821,660	2,519,642	3,183,058	4,588,784	3,549,160
Terminal-services and other	943,790	1,964,166	2,835,282	3,681,691	1,582,724	2,126,756	2,099,342	1,331,136
Terminal Revenue (non-aero)	7,628,645	9,022,922	7,890,938	7,210,318	8,181,719	12,535,831	14,645,744	11,972,196
Terminal Revenue (non-aero)/Enplanement	1.76	2.10	1.90	1.74	1.93	2.03	1.88	1.88
Rental cars-excludes customer facility charges	20,610,956	10,305,648	11,460,088	10,664,355	10,518,326	14,639,818	10,993,089	9,036,602
Parking and ground transportation	16,701,444	20,013,134	31,417,165	28,364,971	50,561,863	40,322,190	26,438,920	27,118,729
Hotel	-	-	455,689	300,000	204,423	752,727	-	-
Other Non-Aeronautical Revenue	1,222,462	12,534,378	3,518,788	1,783,627	12,371,652	9,287,314	1,537,957	2,179,528
Total Non-Aeronautical Revenue	51,076,927	56,719,643	56,971,267	48,731,522	100,242,286	77,910,370	60,289,459	51,519,604
Total Operating Revenue	91,635,807	96,038,594	137,254,132	143,048,079	158,246,701	135,764,968	96,049,876	107,339,892

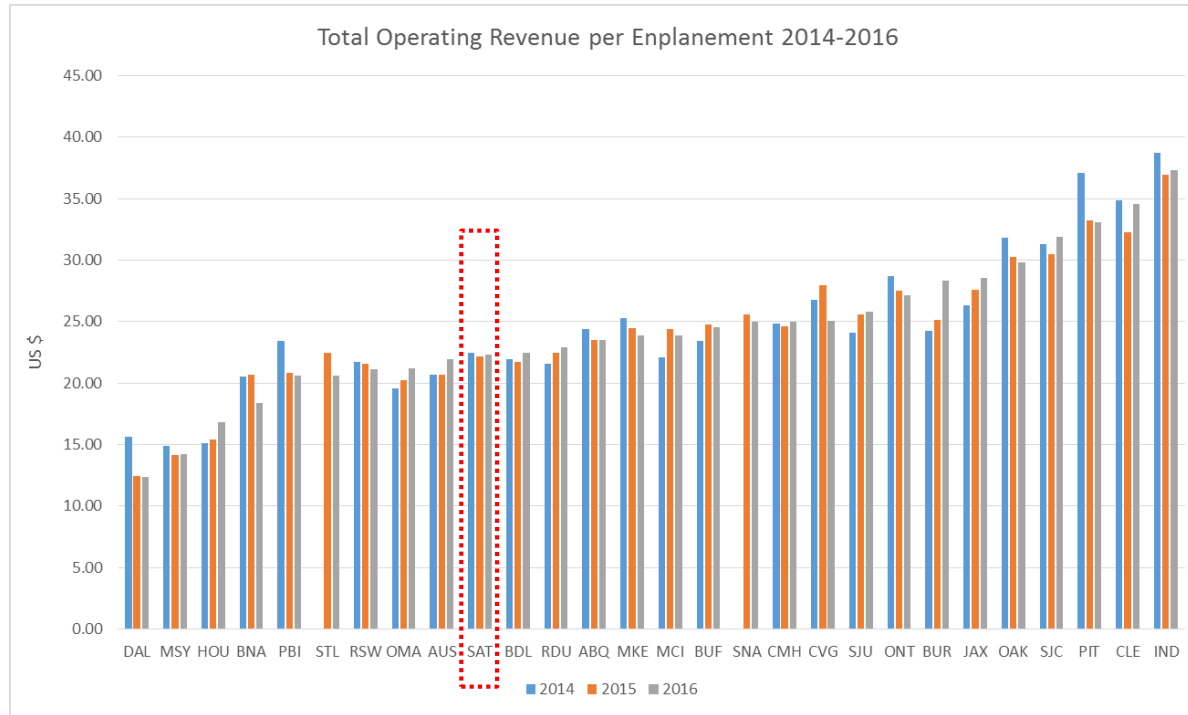


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Benchmarking at SAT

- How do we do compared of other Medium Hub Airports?

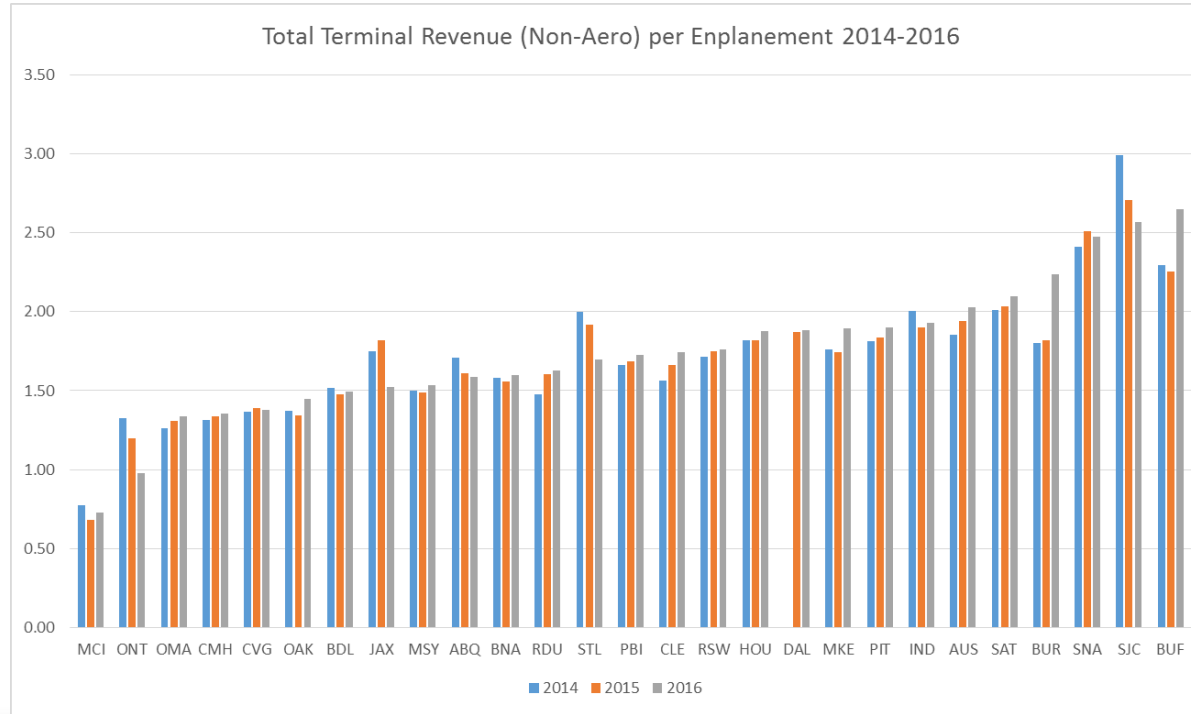


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Benchmarking at SAT

- Other benchmarking metrics



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Benchmarking at SAT

- Other metrics we use to benchmark for non-aeronautical terminal revenues
 - Non-aeronautical revenue per enplanement per terminal area
 - Non-aeronautical revenue per enplanement by type of concession
 - Adjustment to purchasing power

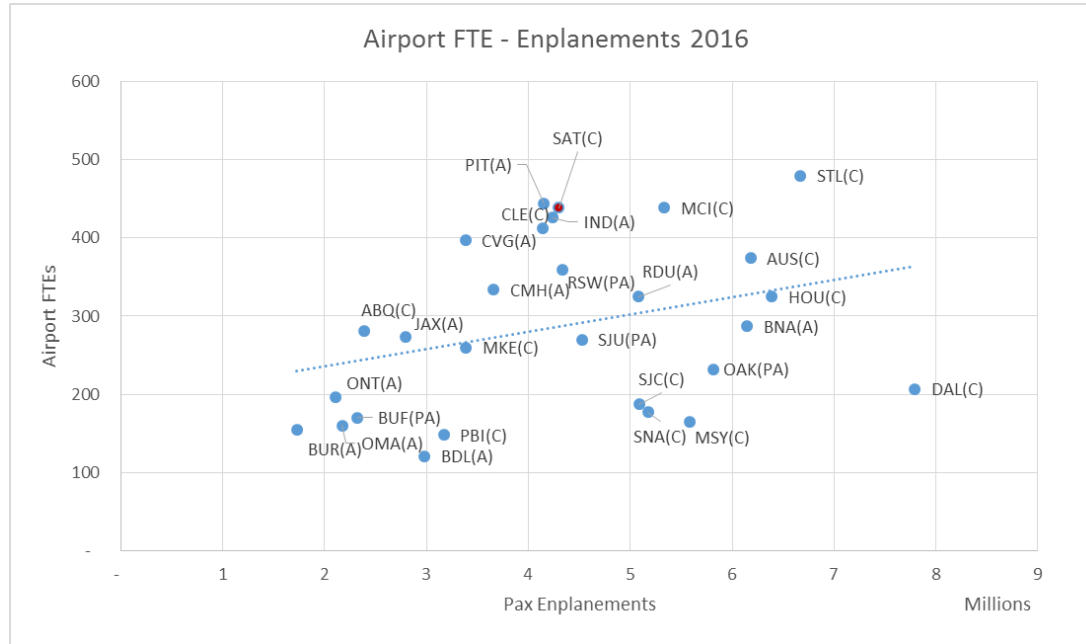


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Benchmarking at SAT

- Another important efficiency benchmark

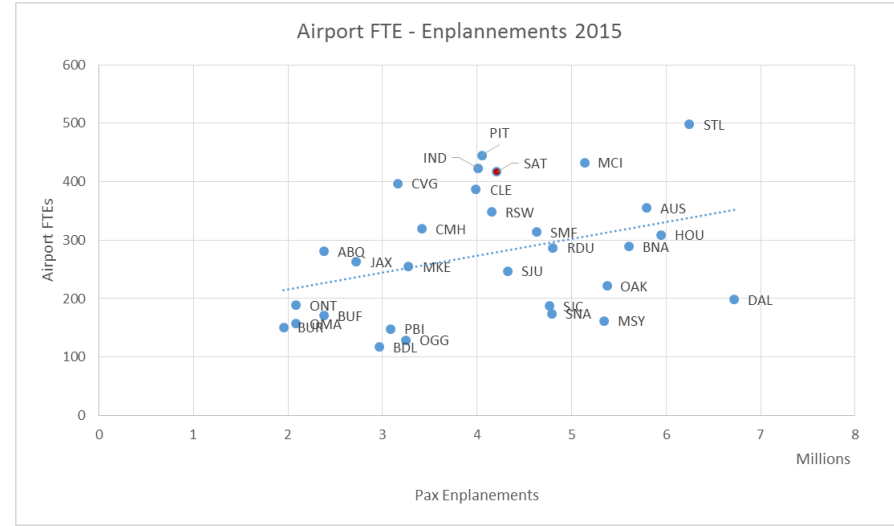
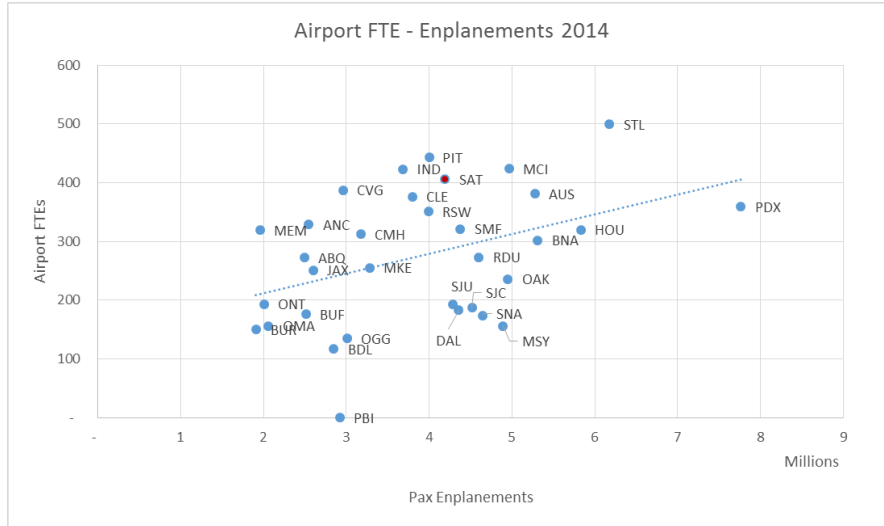


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Benchmarking at SAT

- Is this a historical trend?



- Many moving parts to this



Benchmarking at SAT

- So What?
 - Working on various initiatives
 - Working on process improvement projects to enhance efficiency
 - Sharing resources



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Benchmarking at SAT

- Some of the data sources
 - FAA CATS Form 127
 - Airport Revenue News
 - Survey reports
 - ACI ASQ Survey results



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Benchmarking at SAT

- Challenges and work around
 - Data reporting
 - Data interpretation
 - Local conditions
 - Know your airport and the airports you are benchmarking against



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Benchmarking at SAT

That's all folks!

Thank you



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

ACI Benchmarking Survey Results



Benchmarking Tool Options

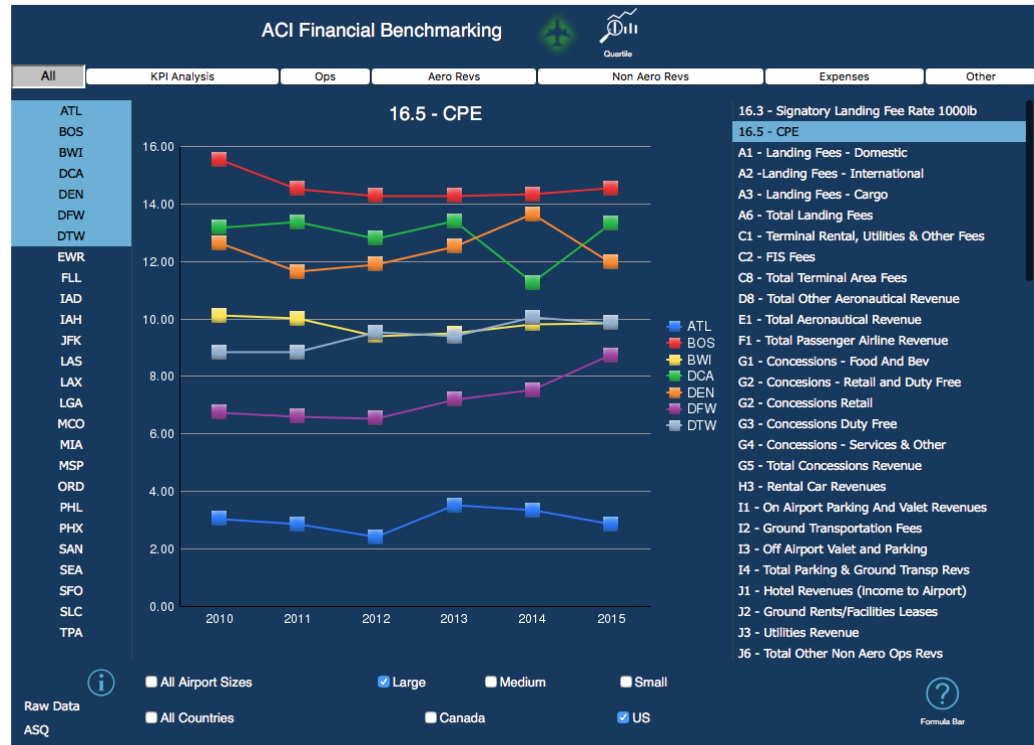
ACI Centerlines Finance Benchmarking Tool

- Provides the ability to compare up to six years of data for up to 90 individual variables
- Subscription-model
- Contains both graphic and download capabilities



CENTERLINES FINANCE
Airport Financial Benchmarking

www.aci-na.org/centerlines-finance



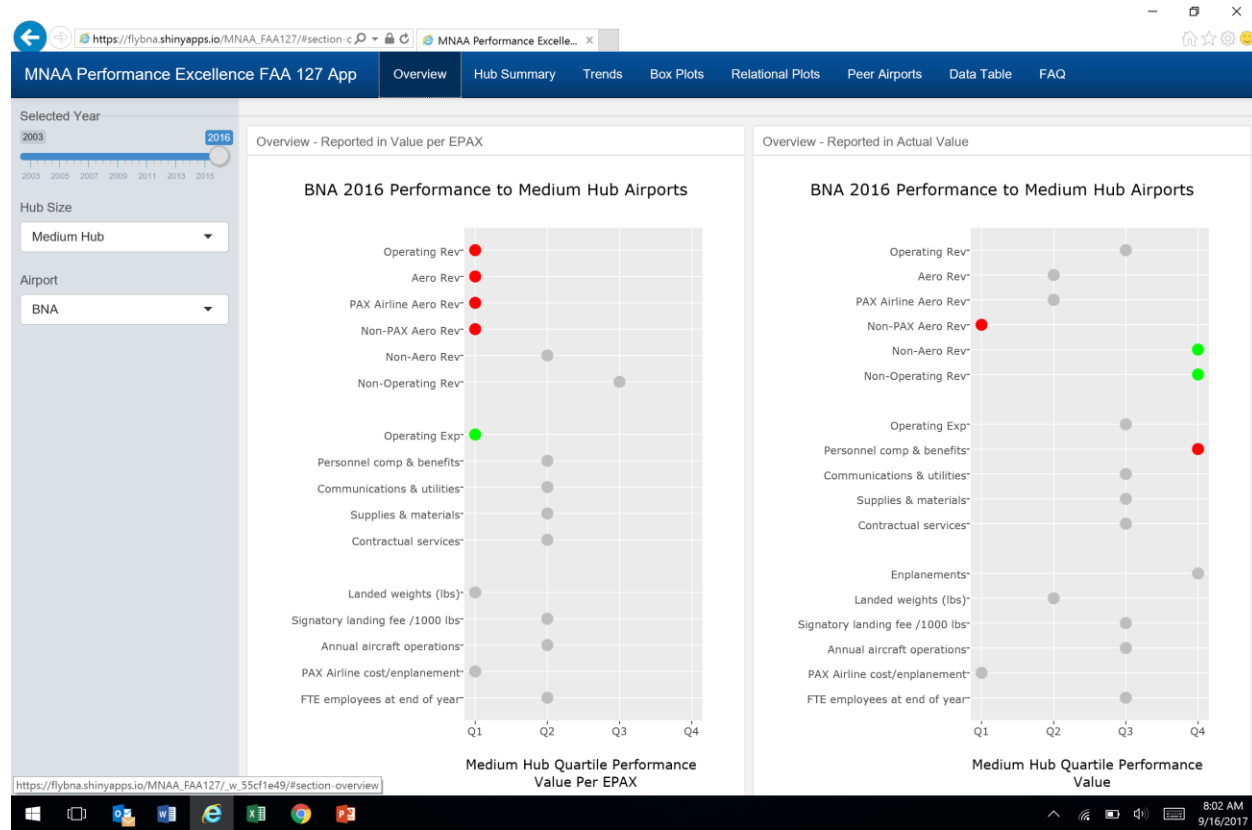
TPA Benchmarking Survey Online Tool

- Accessed online (aci.tampaairport.com) via airport specific user names and passwords
- Created and hosted by Tampa International Airport
- Free-of charge to any airports who participate in the Benchmarking Survey
- Data download only, no graphing capabilities

Survey Questions	FLL	MCO	RSW	TPA
K12 - Total Non Passenger Airline Operating Revenue	\$144,267,318.00	\$302,602,202.00	\$57,633,989.14	\$152,028,994.71
K12a - Per Enplanement	\$10.05	\$14.59	\$13.30	\$16.03
K12c - Per Total Operation	\$442.75	\$957.17	\$725.47	\$803.47
K14 - Percent of Operating Revenues Paid by Passenger Airlin...	28.18%	34.55%	37.11%	23.84%
K15 - Percent of Operating Revenues Paid from Other Sources	71.82%	65.45%	62.89%	76.16%
K16 - Personnel Expense (Salary + Fringe Benefits)	\$36,718,555.00	\$61,671,668.00	\$37,046,728.23	\$58,625,719.54
K16a - Per Enplanement	\$2.56	\$2.97	\$8.55	\$6.18
K16b - Per Passenger Airline Ops	\$131.84	\$209.26	\$532.40	\$352.71
K17 - Total Operating Expenses	\$141,889,053.00	\$262,865,221.00	\$77,421,343.79	\$119,472,686.69
K18 - Total Debt Outstanding	\$1,907,640,000.00	\$1,215,932,000.00	\$290,836,462.83	\$1,170,083,527.00
K18a - Per Enplanement	\$132.91	\$58.64	\$67.12	\$123.35
K2 - Landing Fee Rate	\$1.57	\$0.00	\$2.55	\$1.57
K25 - Net Debt Service	\$68,954,911.00	\$-54,255,965.00	\$24,690,108.00	\$50,002,859.98
K25a - Per Enplanement	\$4.80	\$-2.62	\$5.70	\$5.27
K29 - On Airport parking revenue per parking space	\$3,959.00	\$2,763.22	\$1,364.88	\$3,278.00
K3 - Total Passenger Airline Revenue	\$56,617,311.00	\$159,762,762.00	\$34,001,816.81	\$47,586,831.92
K30 - On airport parking revenue per enplanement	\$10.44	\$7.73	\$7.15	\$17.78
K6 - Total Concession Revenue	\$27,993,429.00	\$58,111,590.00	\$7,628,644.94	\$22,950,155.94
K6a - Per Enplanement	\$1.95	\$2.80	\$1.76	\$2.42
K7 - Total Rental Car Facility Revenue	\$34,879,695.00	\$99,627,290.00	\$20,610,956.45	\$36,663,391.13
K7a - Per Enplanement	\$2.43	\$4.80	\$4.76	\$3.87

MNAA Performance Excellence FAA 127 App

- Accessed online (https://flybna.shinyapps.io/MNAA_FAA127/#section-overview)
- Focuses on the FAA's Part 127 data survey
- Greater level of statistical analysis presented





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

ACI Benchmarking Survey Results



Benchmarking Survey Usage Survey

ACI-NA Benchmarking Survey Usage Survey

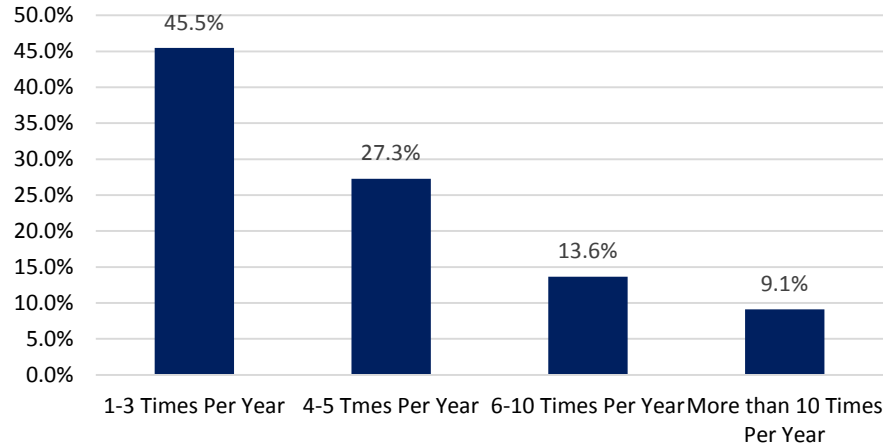
- During the 4th quarter of 2017, ACI-NA surveyed airports regarding their use of the ACI-NA Benchmarking Survey
- The goal of the survey was to;
 1. quantify how much the current survey was being utilized by the airport community, and by which functional airport departments
 2. better understand what data was being utilized by the airports
 3. Identify what requested data could be eliminated in an effort to make the survey more user-friendly and valuable to the airport community



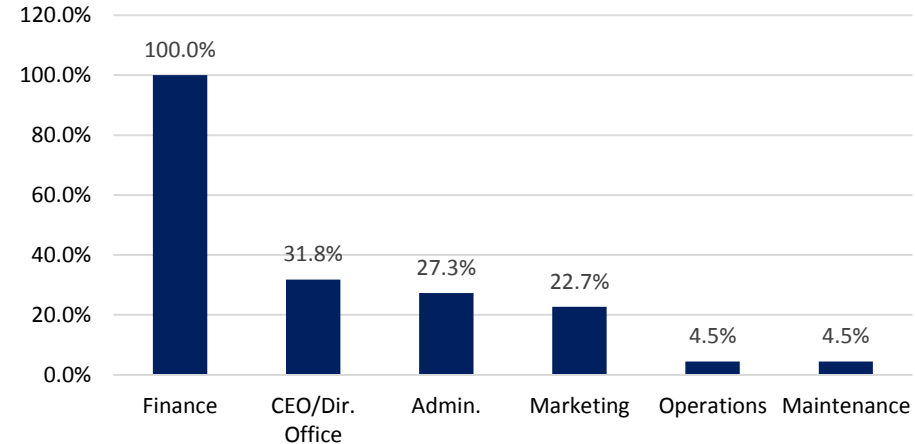
The screenshot shows the homepage of the ACI-NA Airport Financial Benchmarking Survey. The header features the ACI-NA logo and the text "AIRPORTS COUNCIL INTERNATIONAL - NORTH AMERICA The Voice of Airports". Below the header is a navigation menu with links: Home, About ACI-NA, Join ACI-NA, Conferences, Committees, Newsroom, Stats & Resources, Products Guide, and Annual Conference. A "Member Login" button is in the top right corner. The main content area is titled "ACI-NA Airport Financial Benchmarking Survey". It describes the survey as a service for participating ACI-NA members, aimed at measuring operational and financial performance. It mentions that the survey can automatically produce the FAA Form 127 Report. A section for the "2018 (FY2017) Survey" includes a download link for the latest survey form (dated 12/05/17) with a warning to download the file again if an error message appears. A note instructs users to fill out the survey first and then use it to produce the FAA Form 127 report, with a contact link for assistance. Below this, there are instructions for users, including reading the instructions tab, ensuring the survey is protected by a password, and checking for the latest survey form. A deadline notice states that responses must be submitted by March 23, 2018, for inclusion in the preliminary results. A second deadline of July 11, 2018, is mentioned for final results distribution. A thank you message and contact information for Ashley Sng are provided. The page also lists past survey participants with links to the 2017 (FY16) and 2016 (FY15) survey results.

ACI-NA Benchmarking Survey Usage Survey

How many times per year does your organization utilize the ACI Benchmarking Survey Data?

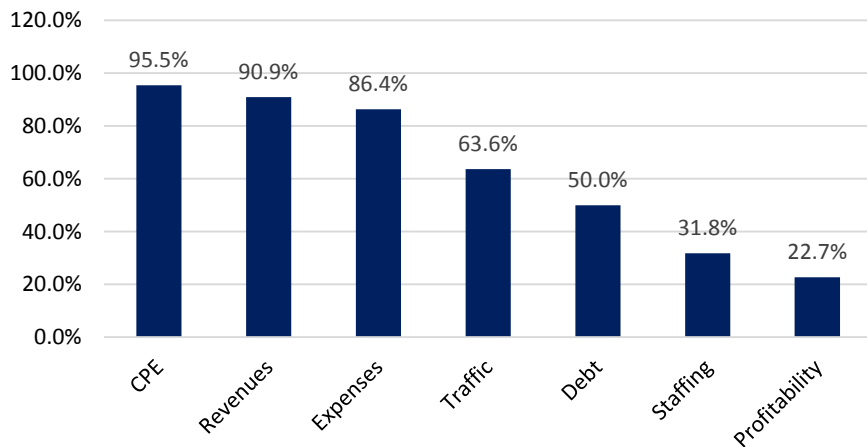


Which functional departments utilize the benchmarking data contained within the survey?

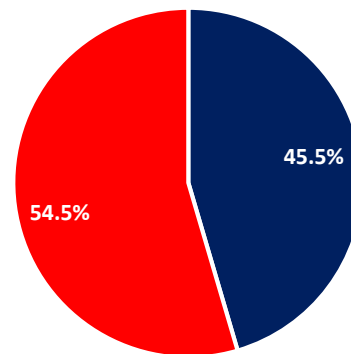


ACI-NA Benchmarking Survey Usage Survey

Which Benchmarking data categories does your organization utilize from the ACI Benchmarking Survey



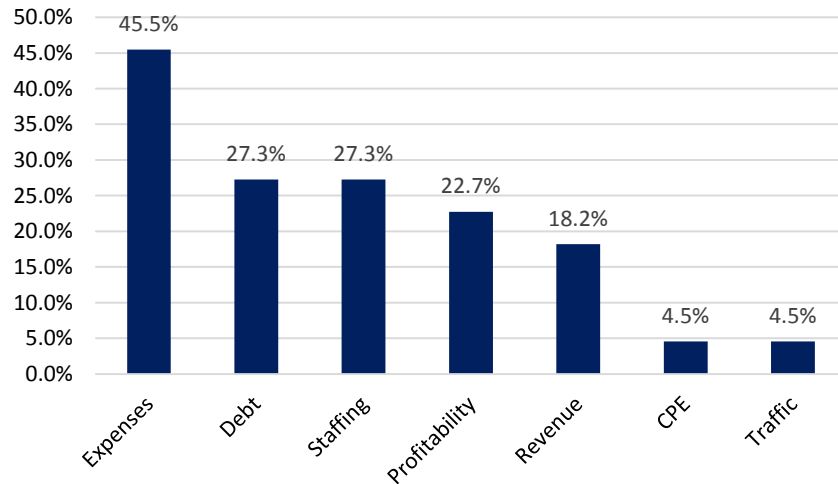
Considering the value your airport gets from the survey, is the time it takes to fill out the survey too long or just about right?



■ Takes Too Long to Fill Out ■ Just About Right

ACI-NA Benchmarking Survey Usage Survey

Which sections of the Survey could be shortened while still maintaining the value to your organization?



- In followup to the 2016 Benchmarking Survey, one common response from airports who did not participate this year was that it took too long to fill in the survey and that they were generally short of staff resource
- The ACI-NA Finance Steering Committee is looking for volunteers to participate in a task force which will focus on streamlining the existing Survey
- By streamlining the Survey, we can shorten the time it takes to fill it in resulting in higher participation and the higher the participation, the greater the value to the industry

Questions?