



Hartsfield-Jackson Update

prepared for:



November 20, 2013

Louis Miller

Aviation General Manager



Airport Overview

Airport Structure

- Hartsfield-Jackson is owned and operated by the City of Atlanta
- Airport GM reports to COO/Mayor of the City of Atlanta
- Atlanta City Council approval process
- Stand-alone enterprise fund
- Receives no city or state taxpayer funding



City of Atlanta
Mayor Kasim Reed



Aviation General Manager
Louis Miller

Airport Overview

Hartsfield-Jackson at a Glance

- More than 920,000 total flights per year
- 260,000 average daily passengers
- Nonstop flights to 156 U.S. cities
- Nearly 80 international cities in 50 countries
- 5.6 million-square-foot terminal complex
- 4,700-acre campus with cargo, maintenance and support facilities



Airport Overview

Hartsfield-Jackson at a Glance

World's Busiest Airports | Total Passenger Traffic

Atlanta	95,513,828
Beijing	81,929,359
London	70,038,804
Tokyo	66,795,178
Chicago	66,633,503
Los Angeles	63,688,121
Paris	61,611,934
Dallas/Ft. Worth	58,621,369
Jakarta	57,772,762
Dubai	57,684,550

Airport Overview

ATL Low Landing Fees

Airport	Landing Fee
Atlanta – ATL	\$0.82
Miami – MIA	\$2.23
Los Angeles – LAX	\$2.69
Chicago – ORD	\$2.83
Houston – IAH	\$3.06
Dallas/Ft. Worth – DFW	\$3.11
New York – JFK	\$5.65

Airport Overview

Passenger Traffic

	2010	2011	2012
Passengers	89.3 million	92.4 million	95.5 million
Operations	950,119	923,996	930,310

- 2012 95.5 million passengers is 3.35 percent higher than the 2011 record of 92.39 million passengers
- The Airport accommodated 9.9 million international passengers in 2012
- Aircraft operations (landings and takeoffs) increased from 923,996 in 2011 to 930,310 in 2012.
- 994,346 operations in 2007 was an ATL record



Airport Overview

International Terminal

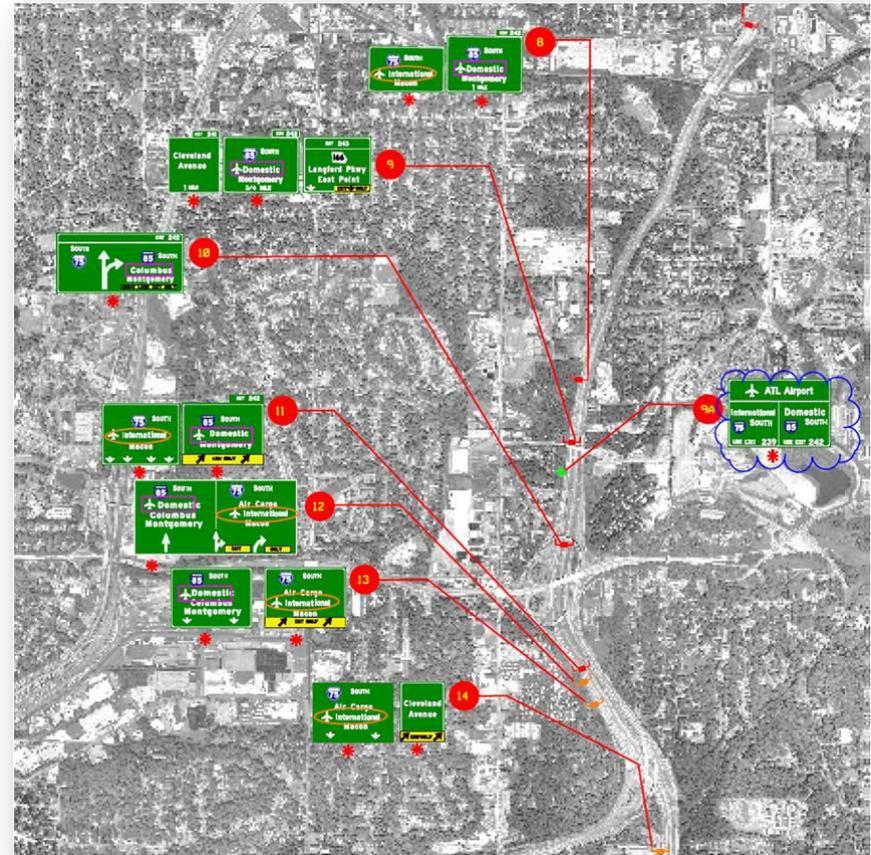
- The \$1.4 billion facility opened on May 16, 2012
- The terminal connects with Concourse E to create a 40-gate international complex
- A total of 28 retail outlets, restaurants and other business services have generated an estimated \$50.6 million in first-year sales
- Eliminates baggage recheck process for Atlanta-bound international travelers
- We've added seating and additional luggage carts to accommodate travelers who need to walk between some arrival gates on E and passport control on F



Airport Overview

International Terminal – GDOT Signage Project

- Replaced 15 existing sign structures
- Reused 58 existing structures
- Signs at 27 locations
- Total new panels 113 at 100 locations



I-75/85 Connector sign plan

Airport Overview

International Terminal – GDOT Signage Project

- \$8.5 million roadway signage package that included
 - Interstates
 - State routes
 - Surface streets
- Signage helps provide easy access from I-75 using existing exits and ramps



Airport Overview

Airport Operating Revenue Plan – FY 2014

	FY2012	FY 2013		FY2014
	Actual	Budget	Projected Actual	Budget
Aeronautical Revenues:				
Landing Fees	\$ 48,009,361	\$ 48,407,807	\$ 47,213,684	\$ 47,976,664
CPTC Rentals	80,376,689	149,087,997	146,515,016	150,162,609
Concessions Credit	(37,691,697)	(44,465,103)	(47,119,000)	(47,155,254)
Airside Rentals	21,836,565	22,433,439	22,841,537	23,561,178
Cost Recoveries	22,065,012	34,094,538	33,433,513	36,424,255
Total Aeronautical Revenues	\$ 134,595,930	\$ 209,558,678	\$ 202,884,750	\$ 210,969,452
Non Aeronautical Revenues:				
Landside Rentals	\$ 16,056,261	\$ 16,103,263	\$ 15,876,348	\$ 16,864,822
Commercial Revenues				
Public Parking	114,128,697	114,175,764	115,056,684	118,476,402
Inside Concessions	75,383,394	88,930,206	90,389,910	94,310,508
Rental Car	30,763,697	31,644,825	32,119,497	32,922,484
Ground Transportation	1,621,075	1,876,476	1,811,129	1,992,190
Other	7,688,231	4,196,000	11,545,000	2,541,000
Non Airline Cost Recoveries	9,202,014	11,830,972	10,401,751	12,477,166
Other Revenues	4,692,886	5,191,173	7,194,461	7,140,000
Total Non Aeronautical Revenues	\$ 259,536,255	\$ 273,948,679	\$ 284,394,780	\$ 286,724,572
Total Operating Revenues	\$ 394,132,185	\$ 483,507,357	\$ 487,279,530	\$ 497,694,024

Airport Overview

Operating Expense Budget – FY 2014

	FY2012	FY 2013		FY2014
	Actual	Budget	Projected Actual	Budget
EXPENSES:				
Salaries & Benefits	\$ 72,849,778	\$ 82,591,281	\$ 73,390,320	\$ 83,629,521
3rd Party Operating & Maintenance Contracts:				
Parking Operations	19,378,410	27,466,726	29,646,726	32,211,167
Security (Access Control/Gate Guard/Fingerprints)	6,492,825	8,454,960	8,053,239	8,224,340
AGTS System/ ATL Sky Train	21,106,731	23,656,658	23,661,908	24,205,000
Customer Service	2,077,166	2,077,166	2,077,166	3,000,000
Rental Car Center Operations (180601)	2,853,797	3,150,337	3,150,337	3,100,000
CPTC Maintenance	2,413,182	2,991,484	2,552,892	2,900,000
Total 3rd Party Op. & Maint. Contracts	\$ 54,322,111	\$ 67,797,331	\$ 69,142,268	\$ 73,640,507
Other Contract Services	25,669,920	35,002,808	34,653,582	42,768,046
Total Contract Services	\$ 79,992,031	\$ 102,800,139	\$ 103,795,850	\$ 116,408,553
Total Supply Accounts	\$ 12,495,318	\$ 16,853,951	\$ 14,535,397	\$ 16,228,946
Capital Expenses	184,626	623,734	443,734	622,700
Interfund Charges	14,711,020	11,833,350	14,403,604	13,086,147
Other Operating Costs	8,004,137	7,487,578	6,798,515	9,309,043
Total Operating Fund Expense Budget	\$ 188,236,910	\$ 222,190,033	\$ 213,367,420	\$ 239,284,910

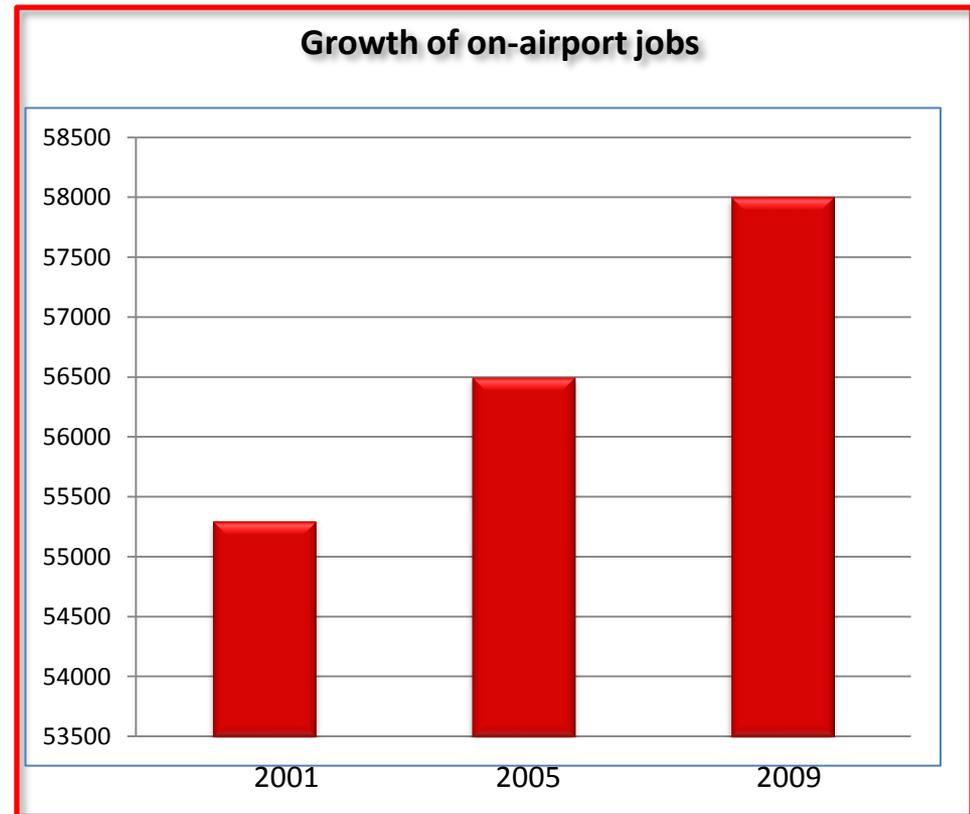


Economic Impact

Economic Impact

Economic Impact Study

- \$32.6 billion direct regional economic impact
- Provides 58,000 jobs on site
- Responsible for \$16 billion in personal income



Source: 2009 Airport Economic Impact Study

Economic Impact

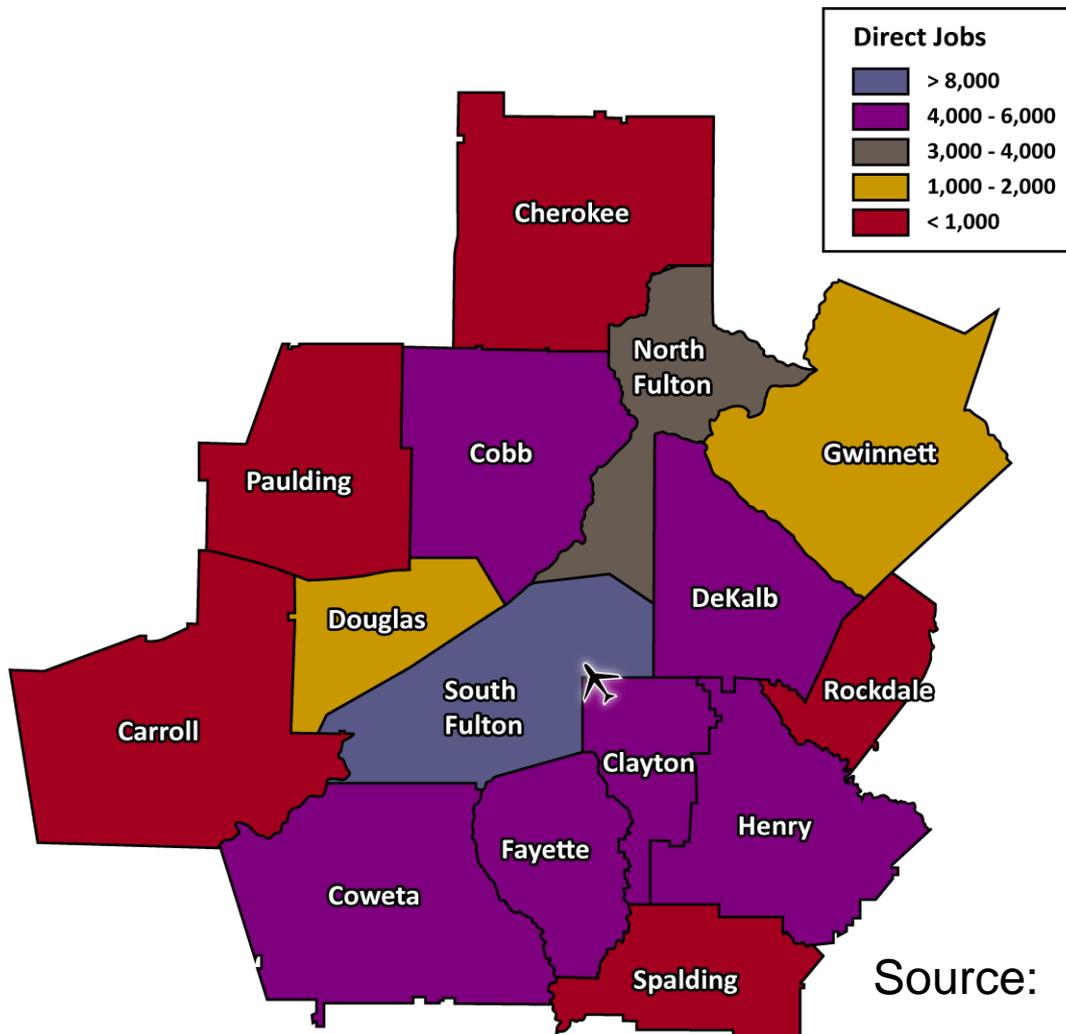
Hartsfield-Jackson Creates Jobs

Jobs	Airport Generated	Visitor Industry	Related Jobs	Total Jobs
Direct	58,056	169,500	10,300	237,800
Indirect	33,200	28,200	8,400	69,800
Induced	59,000	55,000	12,700	126,800
Total	150,300	252,700	31,400	434,400

Source: 2009 Airport Economic Impact Study

Economic Impact

Employment Geography



S. Fulton	15.5%
Clayton	9.7%
DeKalb	9.6%
Henry	9.1%
Fayette	8.2%
Cobb	7.7%
Coweta	7.4%
N. Fulton	6.0%
Gwinnett	3.4%
Douglas	2.3%
Cherokee	1.1%
Other GA	8.5%
Other US	11.5%

Source: 2009 Airport Economic Impact Study

Economic Impact

Atlanta, GA: *World-Class Business Center*



- 40% of U.S. Manufacturing and Distribution is within 500 miles of Atlanta
- Atlanta is within a two-hour flight of 80% of the top 150 largest metropolitan areas.

Economic Impact

ATL Cargo Operations

- Cargo is a strong growth area for the Airport
- Currently 11 cargo and integrated air carriers ship \$7 billion in goods annually out of Hartsfield-Jackson
- Plans are underway for a fourth building in the south cargo complex
- The new 100,000-square-foot cargo facility is scheduled to open in 2014
- This \$28 million facility is a key element in the \$40 million we're investing in our south cargo facilities



Economic Impact

ATL Cargo Operations



North Cargo Complex



South Cargo Complex

Circle indicates site of new cargo warehouse

Economic Impact

New Porsche headquarters

- \$100 million project at former Ford plant
- Facility will house a test track
- 400 workers will be located at the site including 100 newly created jobs



- Estimated completion date – December 2014
- Facility operational by the end of the first quarter of 2015

The top half of the image features several overlapping, wavy lines in various shades of blue, ranging from light sky blue to a darker, muted blue. These lines flow from the left side towards the right, creating a sense of movement and depth against the solid light blue background.

Preparing for the Future

Preparing for the future

Vertical Transportation

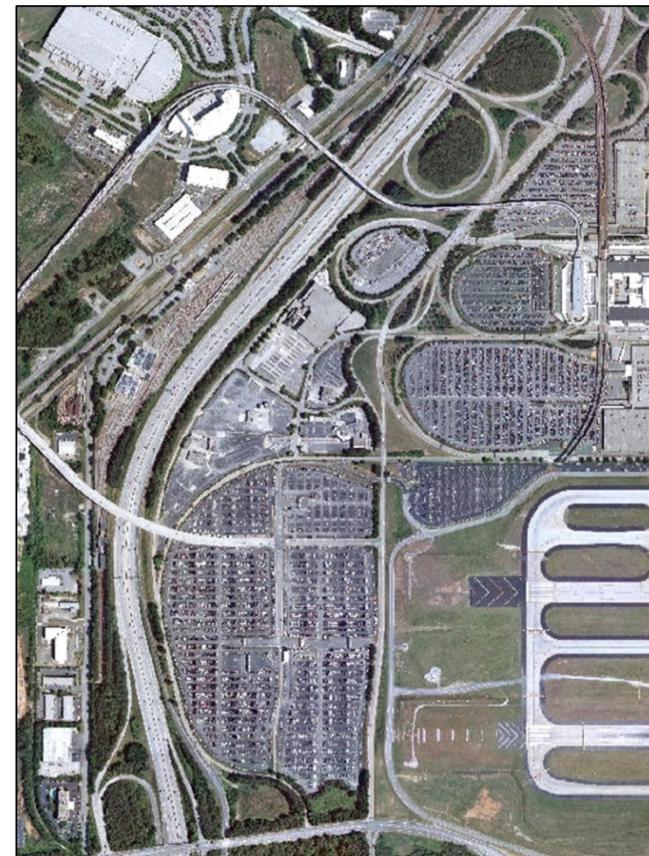
- Scope
 - 38 escalators
 - 45 elevators
 - 16 moving walkways
- Phase I – Complete
- Phase II – In progress and is scheduled for completion November 2013
- Phase III
 - Construction began in late 2012
 - Scheduled completion in July 2016
- Total investment all phases \$59 million



Preparing for the future

Inbound Roadways

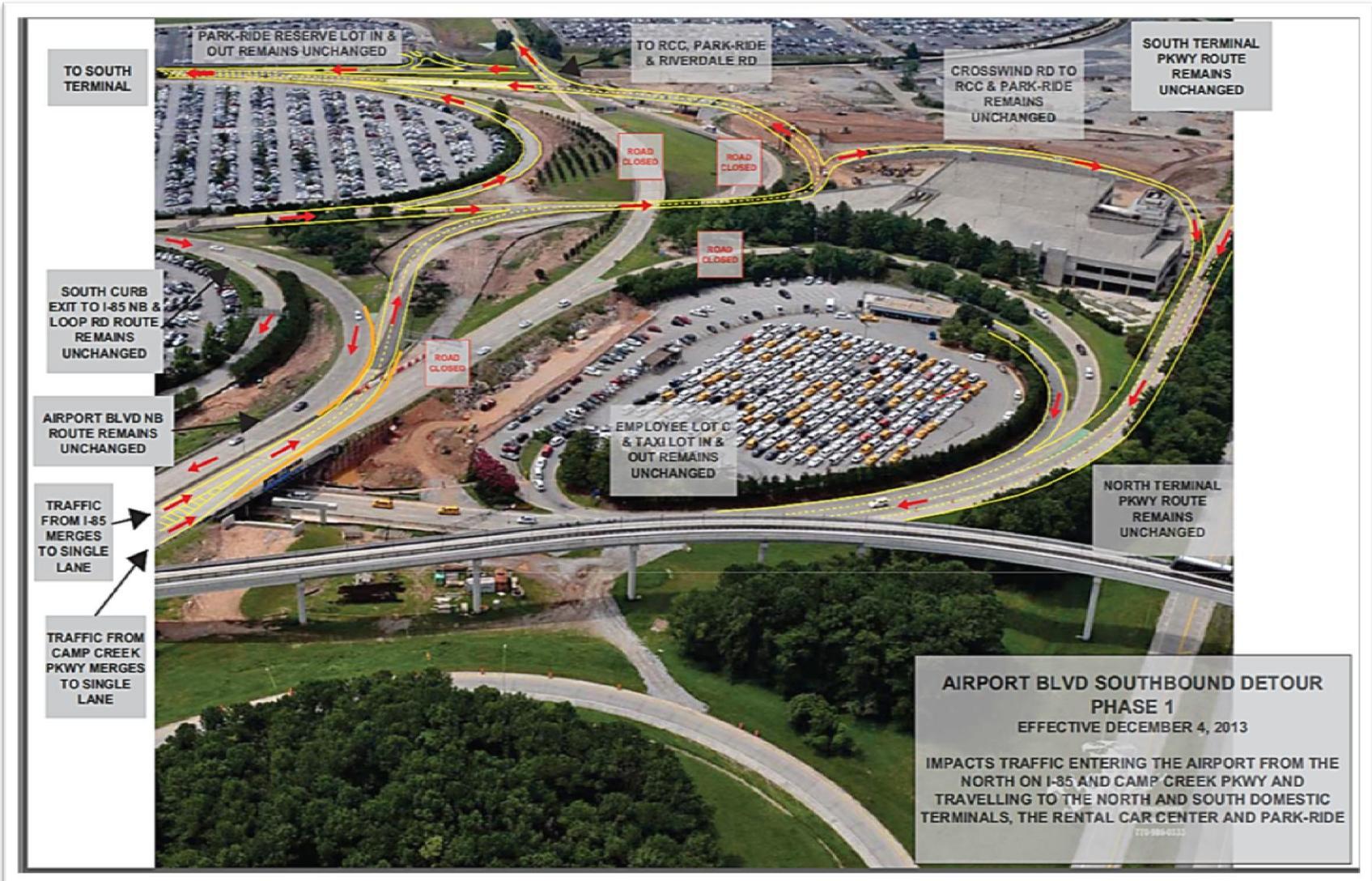
- Will provide better separation of traffic entering and moving through the Airport
- Routes Rental Car traffic directly to I-85 to eliminate the need to use Riverdale Rd to enter the interstate
- Changes Airport entrance on Riverdale Rd to the signalized intersection with Airport Blvd
- Project Cost: \$63 million
- Construction completion – January 2015



Overall project area

Preparing for the future

Inbound Roadways - Southbound Airport Blvd Detour Dec 4, 2013



Preparing for the future

Concourse C Midpoint

■ Scope

- Renovation and expansion of 52,000 square feet
 - Additional vertical circulation
 - 2 new escalator banks
 - 2 new service elevators
- Expands seating areas and provides for additional food & beverage and retail locations
 - Current estimate \$51 million
 - Completion scheduled for spring 2015



Preparing for the future

A380 Preparation Activities

- Runway and taxiway shoulder widening completed fall 2012
- Modifications to gates on Concourse E completed in December 2012
- Service began September 2013
- Daily service began October 2013



Preparing for the future

Master Plan 1999 | Capital Improvement Program

\$6.4 billion - Largest public works project in Georgia's history

- Fifth Runway (Runway 10-28) - \$1 billion
- Maynard H. Jackson Jr. International Terminal - \$1.4 billion
- Consolidated Rental Car Facility - \$640 million
- Central Passenger Terminal Complex Upgrades- \$519 million
- Other Airfield Projects - \$377 million
- Facilities Maintenance - \$128 million
- Inbound Roadways - \$63 million
- Parking Expansion - \$60 million

Preparing for the future

ATL Master Plan



- Study began in summer 2012
 - Planning horizon in 20 years
- FAA Approved Forecasts:
 - Passengers are forecast to be 120 million
 - Operations are forecast to be 1,075,000 in 2031
- Modeling of airport systems and facilities is underway, using gated schedules for future years
- Facility requirements were completed in March 2013
- Alternative development plans are being evaluated
- Project completion scheduled for first quarter 2014

Preparing for the future

ATL Master Plan

- Location of new gates will be vetted
- In the near term – possible development of a second end-around taxiway
- Examining additional parking alternatives
- Construction of a sixth runway is being thoroughly investigated



Preparing for the future

Sustainability Master Plan – Main target areas

- Main Target Areas
 - Policy Development
 - Procurement
 - Construction
- A major achievement is the receipt of LEED (Leadership in Energy and Environmental Design) Gold certification for the Maynard H. Jackson Jr. International Terminal
- The Atlanta Better Buildings Challenge (Atlanta BBC) recognized ATL as one of just 20 Atlanta properties to complete its Atlanta BBC goal in 2013 and among the first to achieve it within less than two years of the program's launch



ATLANTA
BETTER BUILDINGS
CHALLENGE



Questions