

TANGIBLE RESULT #10

Facilitate Economic Opportunity in Maryland



Maryland's transportation system is essential to the State's economy. An efficient transportation system provides a competitive advantage to businesses in a regional, national and global marketplace. Transportation directly impacts the viability of a region as a place where people want to live, work and raise families, all critical to attracting a competent workforce.

RESULT DRIVER:

Jim Dwyer

Maryland Port Administration (MPA)

Facilitate Economic Opportunity in Maryland

TANGIBLE RESULT DRIVER:

Jim Dwyer
Maryland Port Administration (MPA)

PERFORMANCE MEASURE DRIVER:

John Thomas
State Highway Administration (SHA)

PURPOSE OF MEASURE:

To track direct, indirect and induced jobs generated by annual construction investments as an indicator of transportation projects contribution of economic return.

FREQUENCY:

Annually (in October)

DATA COLLECTION METHODOLOGY:

MDOT compiles the necessary data through the annual CTP process.

NATIONAL BENCHMARK:

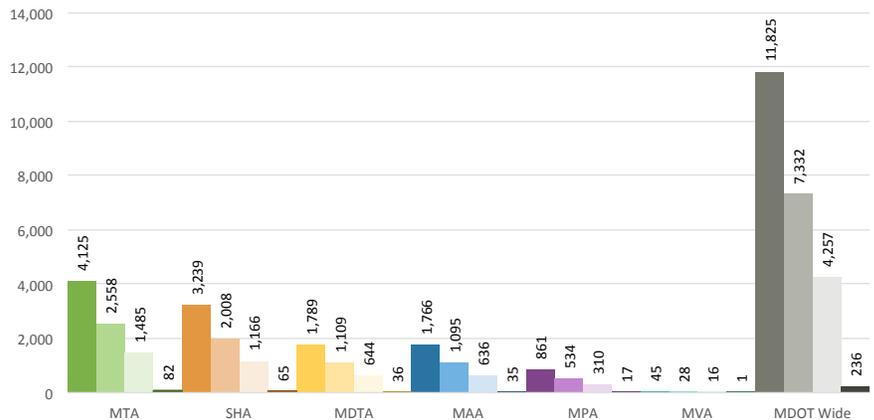
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PERFORMANCE MEASURE 10.1

Economic Return from Transportation Investment

Construction spending on transportation projects has a significant economic impact on people and businesses throughout the state. Economic return from transportation investment is assessed based on the estimated number of jobs created as a result of MDOT investments in capital projects. The annual CTP is used to identify planned investments by each MDOT TBU on major construction projects. Construction projects generate three types of jobs: direct jobs are those generated by the actual construction activity; indirect jobs are supported by the business purchases necessary for the project’s construction; and induced jobs are a result of local purchases of goods and services by the direct employees. Capital investments in transportation infrastructure support economic activity across a wider region, beyond the specific project location.

FY 2016 Estimate Jobs Created by Business Unit Constructor Program



Facilitate Economic Opportunity in Maryland

TANGIBLE RESULT DRIVER:

Jim Dwyer

Maryland Port Administration (MPA)

PERFORMANCE MEASURE DRIVER:

John Thomas

State Highway Administration (SHA)

PURPOSE OF MEASURE:

To compare Maryland against other states' economic activity based on access to and condition of the infrastructure.

FREQUENCY:

Annually (in October)

DATA COLLECTION METHODOLOGY:

Using publicly available data, CNBC assesses every states' infrastructure including value of goods movement; availability of air travel; road and bridge conditions; and commute times.

NATIONAL BENCHMARK:

CNBC annual ranking

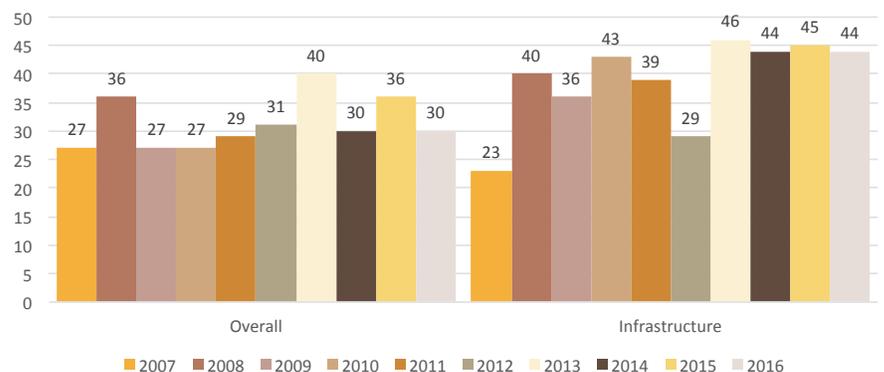
Web link: <http://www.cnbc.com/2016/07/12/americas-top-states-for-business-2016-the-list-and-ranking.html>

PERFORMANCE MEASURE 10.2

Maryland's Ranking in National Transportation Infrastructure Assessment

The CNBC business news media group uses publicly available data on 60 measures of competitiveness to score each state. The metrics are organized into 10 broad categories and weighted based on how frequently each is used as a selling point in state economic development marketing materials. The infrastructure category is a measure of a state's transportation system and supply of safe drinking water. It includes metrics to compare the value of goods shipped by air, waterways, roads and rail within a state, the quality of roads and bridges, and commute times. The annual rankings can be used as a national benchmark for economic activity over time as a means for comparing Maryland's standing versus other states. From 2015 to 2016, Maryland's overall score moved up from 36 to 30 out of 50 states. As of 2016, Maryland moved up slightly from 2015 in 'Infrastructure', (44 out 50 in 2016 up from 45 in 2015) but remains in the bottom 10 because of the inclusion of mobility calculations in the metric.

10.2 America's Top States for Business Annual Rankings for Maryland in Select Categories



Source: CNBC. America's Top States for Business 2016.

Facilitate Economic Opportunity in Maryland

TANGIBLE RESULT DRIVER:

Jim Dwyer
Maryland Port Administration (MPA)

PERFORMANCE MEASURE DRIVER:

Juan Torrico
Maryland Transit Administration (MTA)

PURPOSE OF MEASURE:

To assess freight mobility and the amount and value of freight originating and terminating in Maryland as an indicator of how supportive transportation infrastructure is for freight and Maryland's economy.

FREQUENCY:

Annually (in April)

DATA COLLECTION METHODOLOGY:

U.S. Department of Transportation Freight Analysis Framework (FAF3) Version 3 and MPA.

NATIONAL BENCHMARK:

N/A

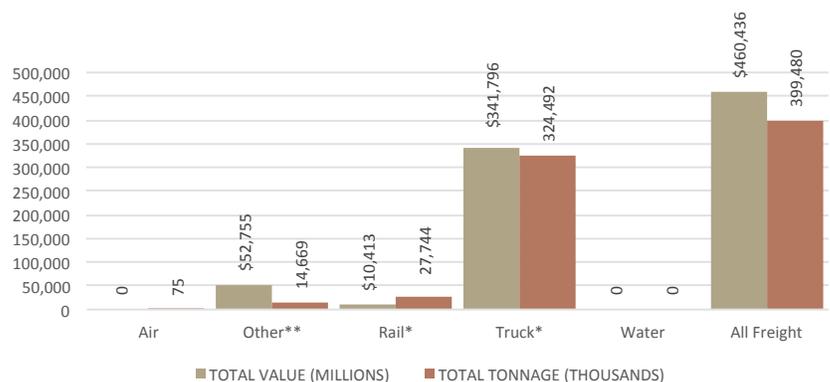
PERFORMANCE MEASURE 10.3A

Freight Mobility: Freight Analysis Framework (FAF) Tonnage and Value of Freight

Efficient and interconnected multimodal freight movement is essential to the State's economy. Maryland manufacturers depend on the freight system to move raw materials and finished goods between production facilities, distribution centers and retail outlets in Maryland and throughout the U.S. and the world. Freight-dependent industries account for over one million jobs in Maryland.

- Water and rail are well-suited to cost-effectively haul goods long distances. Commercial ships utilize the Port of Baltimore to transfer waterborne goods to land, at which point trucks and rail haul these imported goods to communities around the nation.
- Trucks carry nearly every type of commodity, from consumer products to chemicals to machinery.
- High value and time-sensitive products are commonly shipped via air. The top air freight commodities shipped out of MAA facilities include mail, machinery and transportation equipment.

2015 Freight Originating and Terminating in Maryland



Facilitate Economic Opportunity in Maryland

TANGIBLE RESULT DRIVER:

Jim Dwyer

Maryland Port Administration (MPA)

PERFORMANCE MEASURE DRIVER:

Juan Torrico

Maryland Transit Administration (MTA)

PURPOSE OF MEASURE:

To track public and private international waterborne cargo activity in the Port of Baltimore, which is a strong indicator of jobs generated and economic activity.

FREQUENCY:

Quarterly

DATA COLLECTION METHODOLOGY:

U.S. Census data via website – USA Trade Online

NATIONAL BENCHMARK:

Baltimore ranks third in Mid-Atlantic ports in international cargo.

PERFORMANCE MEASURE 10.3B

Freight Mobility: Port of Baltimore Total International Cargo Port-Wide, Market Share and Rankings

Cargo tons through the Port of Baltimore declined 8% in the 2nd quarter due to a 14% drop in bulk commodities (imports and exports). The Port's general cargo was up 5%. Coal exports were the main reason behind the POB's 3% drop in export bulk tons in Q2. Imported salt and sugar are the cause behind the drop in import bulk tons. Salt import tons YTD are down 42% while imported sugar tons YTD are down 20%.

Of all the Mid-Atlantic ports, Baltimore saw the largest percentage increase in general cargo at 5.2%. Wilmington was the only other port that saw a gain in general cargo tons albeit only 0.1%. Baltimore's increase in general cargo tons was primarily driven by an increase in container traffic as well as increases in imported automobiles and paper. Norfolk's general cargo increases were mainly in containerized goods such as furniture and beverages, while containerized exports across a variety of products produced a decrease in overall general cargo export tons. New York's general cargo imports decreased as goods shipped via containers dropped.

Concerning the bulk market place - New York, Philadelphia and Wilmington all saw large increases in bulk import tons as lower oil prices have curtailed domestic crude oil production. With less domestic oil available, refineries are now importing cheap foreign oil. Philadelphia saw increases in their bulk exports – mainly in petroleum products such as propane gas and non-crude oils. New York, Philadelphia and Wilmington also saw large decreases in salt imports. Salt imports YTD June through these ports was down 22%, 37% and 44% respectively. Like Baltimore, Norfolk's bulk exports continue to suffer as coal exports were still decreasing. Coal exports through Norfolk dropped 16% in Q2 and are down 27% YTD June.

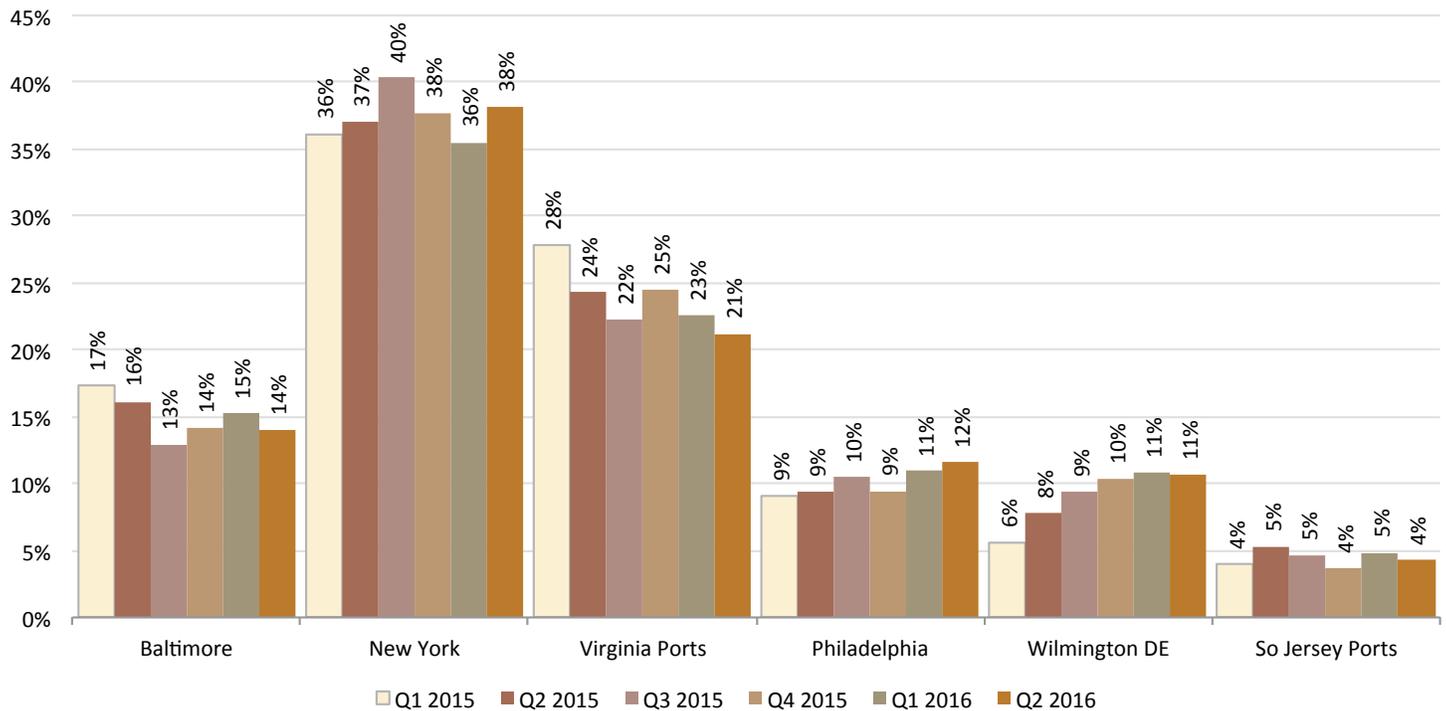
Baltimore ranks third in container market share, second for imported Forest Products and first in Autos and Roll-on/Roll-off heavy equipment. For total international cargo, Baltimore ranks third for the Mid-Atlantic ports.

Facilitate Economic Opportunity in Maryland

PERFORMANCE MEASURE 10.3B

Freight Mobility: Port of Baltimore Total International Cargo Port-Wide, Market Share and Rankings

Mid-Atlantic Ports Total International Cargo, Market Share, (%)



Facilitate Economic Opportunity in Maryland

TANGIBLE RESULT DRIVER:

Jim Dwyer
Maryland Port Administration (MPA)

PERFORMANCE MEASURE DRIVER:

Juan Torrico
Maryland Transit Administration (MTA)

PURPOSE OF MEASURE:

Data shows level of activity at Public Marine Terminals.

FREQUENCY:

Monthly

DATA COLLECTION METHODOLOGY:

Data obtained from MPA cargo billing reporting and statistical system (BRASS). Historical data is available back to 1998.

NATIONAL BENCHMARK:

N/A

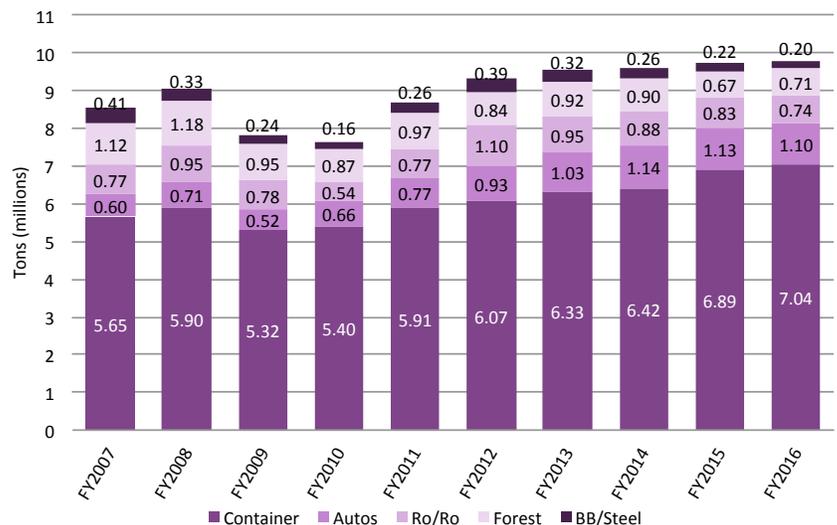
PERFORMANCE MEASURE 10.3C

MPA Total General Cargo Tonnage including the following strategic commodities: Containers, Autos, RoRo and Imported Forest Products

As a rule of thumb, general cargo generates more jobs per ton than bulk commodities. The public terminals' total tonnage for the past three months was greater than the previous three months and greater than the same period of the prior year. Strong import auto tonnage from Fiat made Baltimore the largest import port on the East Coast. Baltimore saw Japanese auto imports increase by 40,000 tons due to increases from Mitsubishi and Subaru. Although low commodity prices on both agricultural products and minerals keep sales of farm and mining equipment suppressed and the strong US dollar discourages exports, Baltimore remains the top Ro/Ro port on the East Coast. Imported paper volumes increased; however, it was somewhat offset by a slight reduction in imported wood pulp.

MPA's general cargo tonnage is up over 3% for the first seven months of 2016. This trend is likely to continue for the rest of the busy summer season as retailers get ready for the holidays.

MPA General Cargo, FY2007 to FY2016



Facilitate Economic Opportunity in Maryland

TANGIBLE RESULT DRIVER:

Jim Dwyer
Maryland Port Administration (MPA)

PERFORMANCE MEASURE DRIVER:

Rafael Espinoza
Maryland Transportation Authority (MDTA)

PURPOSE OF MEASURE:

To minimize the number of weight-posted bridges to facilitate the improvement in movement of goods to businesses, communities and the economy.

FREQUENCY:

Annually (in July)

DATA COLLECTION METHODOLOGY:

Data reflects Federal reporting in April of each year. The number of bridges on the State System that are weight-posted are reported in the Structure Inventory and Appraisal (SI&A) report. That number is then divided by the total number of SHA and MDTA bridges, resulting in the calculation of the percentage of weight-posted bridges on the State system.

NATIONAL BENCHMARK:

N/A

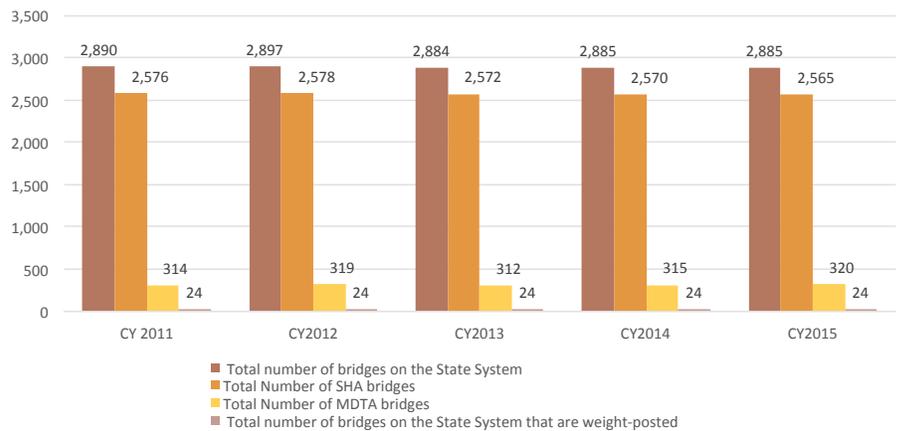
PERFORMANCE MEASURE 10.4

Number and Percentage of Bridges on the State System that are Weight-Posted

Weight-posted bridges are those that are determined unable to safely carry the maximum weight of a legally loaded vehicle (80,000 lbs. for tractor trailers and 70,000 lbs. for dump trucks). Weight-posted bridges adversely affect movement of goods to businesses and communities, and can impact daily commercial operations and business growth. Allowing all legally-loaded vehicles to traverse the bridges on the State system is essential to commerce in Maryland, facilitating the movement of goods and provision of services efficiently throughout the State. Minimizing weight-posted bridges ensures the safety of the traveling public and facilitates emergency response time by avoiding the need to establish detour routes. If a bridge cannot safely carry all legal loads, due to its present condition or original design criteria, it will be evaluated and a vehicle weight will be established that it can safely carry. This lower vehicle weight (which is less than the legal weight) will be placed on signs alerting all potential users of the maximum load that the bridge should carry.

Less than 1% of SHA and MDTA bridges have a weight restriction.

Weight Posted Bridges



Facilitate Economic Opportunity in Maryland

TANGIBLE RESULT DRIVER:

Jim Dwyer

Maryland Port Administration (MPA)

PERFORMANCE MEASURE DRIVER:

Corey Stottlemeyer

The Secretary's Office (TSO)

PURPOSE OF MEASURE:

To quantify the impacts of changes in the transportation network on the state's economy due to completed transportation projects providing businesses with access to labor, customers, and suppliers. Improved access leads to greater opportunities.

FREQUENCY:

Annually (in January)

DATA COLLECTION METHODOLOGY:

As transportation projects are completed and the transportation network is enhanced, changes in travel demand and user choice will be modeled using a transportation economic impact model; this is a multimodal measure.

NATIONAL BENCHMARK:

N/A

PERFORMANCE MEASURE 10.5

Change in Market Access due to Improvements in the Transportation Network

Improving access within Maryland's transportation network is a critical role MDOT plays in facilitating economic opportunity for the citizens of Maryland, its businesses and those who come here to do business. Currently, MDOT does not measure the impact of changes to the transportation network and its effect on market access. This measure would allow MDOT to look at how improvements in roads and multimodal access is affecting Maryland's economy and assess whether businesses have better access to labor, customers, suppliers and international markets.

This measure includes potential impacts from:

- Business Relocation – Improved market access has the effect of strengthening an economy's competitiveness in attracting and retaining business relative to other locations.
- Productivity Growth – Increasing an economy's accessibility and connectivity generates agglomeration benefits from returns to scale in production, knowledge spillovers, and better matching of suppliers and employees to businesses.
- Increased Import/Export Activity – Improving an economy's access to international gateways can enable new import/export activity.

The Process Improvement Team for this measure has met. The tool used to measure the market access has been secured. We are currently developing a standardized approach to modeling projects. We expect to have data in January.

Facilitate Economic Opportunity in Maryland

TANGIBLE RESULT DRIVER:

Jim Dwyer
Maryland Port Administration (MPA)

PERFORMANCE MEASURE DRIVER:

Corey Stottleyer
The Secretary's Office (TSO)

PURPOSE OF MEASURE:

To quantify the impacts of changes in the transportation network on the productivity of people and businesses in Maryland.

FREQUENCY:

Annually (in July)

DATA COLLECTION METHODOLOGY:

As transportation projects are completed and the transportation network is enhanced, changes in travel demand and user choice will be modeled using a transportation economic impact model; this is a multimodal measure.

NATIONAL BENCHMARK:

N/A

PERFORMANCE MEASURE 10.6

Change in Productivity due to Improvements in the Transportation Network

Productivity gains are essential to economic growth as businesses and people have to do more with fewer resources. The transportation network is similar to the Internet and other innovations that allow people and businesses to be more productive. Currently, MDOT does not measure the impact of changes to the transportation network and its effect on productivity.

Using a transportation economic impact model, MDOT will be able to assess four types of productivity benefits to ensure it helps to facilitate business opportunities throughout Maryland:

1. Travel cost savings;
2. Reliability benefits for industry;
3. Delivery logistics and supply chain benefits; and
4. Agglomeration effects on access to specialized skills and services.

The Process Improvement Team for this measure has met. The tool used to measure the productivity has been secured. We are currently developing a standardized approach to modeling projects. We expect to have data in January.



Facilitate Economic Opportunity in Maryland

TANGIBLE RESULT DRIVER:

Jim Dwyer
Maryland Port Administration (MPA)

PERFORMANCE MEASURE DRIVER:

John Thomas
State Highway Administration (SHA)

PURPOSE OF MEASURE:

To estimate benefits to highway users due to Coordinated Highway Action Response Team (CHART) incident management, major/minor capital improvements, signal retiming, HOV lane, and park-and-ride operations as an indicator of cost savings due to reduced delay.

FREQUENCY:

Annually (in January)

DATA COLLECTION METHODOLOGY:

MDOT collects and maintains data on travel speeds, traffic volumes, incidents, and facility usage to develop user cost savings.

NATIONAL BENCHMARK:

N/A

PERFORMANCE MEASURE 10.7

Total User Cost Savings for the Traveling Public due to Congestion Management

The SHA and MDTA implement various projects, programs and policies to reduce congestion and enhance mobility on their facilities. The SHA focuses on both recurrent and non-recurrent aspects of congestion. These include CHART, Incident Management and Intelligent Transportation Systems (ITS) programs, major/minor roadway geometric improvements, traffic signal system optimization, and multimodal strategies like HOV lane operations and park-and-ride facilities. The congestion management solutions implemented by SHA and MDTA result in significant user cost savings (e.g. delay reduction, fuel savings) to automobile and truck traffic. MDOT continues to implement operational strategies, including a Transportation Systems Management and Operations (TSM&O) Strategic Plan, and provides Traffic Incident Management training to partner organizations, while also exploring local, regional and state incident management coordination opportunities. Reductions in travel times directly results in savings in roadway user costs.

Annual User Cost Savings Through CHART Incident Management¹



Facilitate Economic Opportunity in Maryland

TANGIBLE RESULT DRIVER:

Jim Dwyer
Maryland Port Administration (MPA)

PERFORMANCE MEASURE DRIVER:

John Thomas
State Highway Administration (SHA)

PURPOSE OF MEASURE:

To quantify the degree of congestion experienced by highway users when traveling during peak hours.

FREQUENCY:

Annually (in January)

DATA COLLECTION METHODOLOGY:

Includes private sector vehicle probe speed data, and traffic count data on average weekdays.

NATIONAL BENCHMARK:

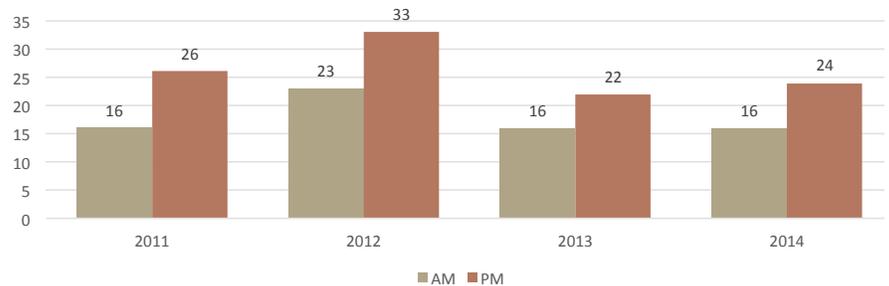
N/A

PERFORMANCE MEASURE 10.8

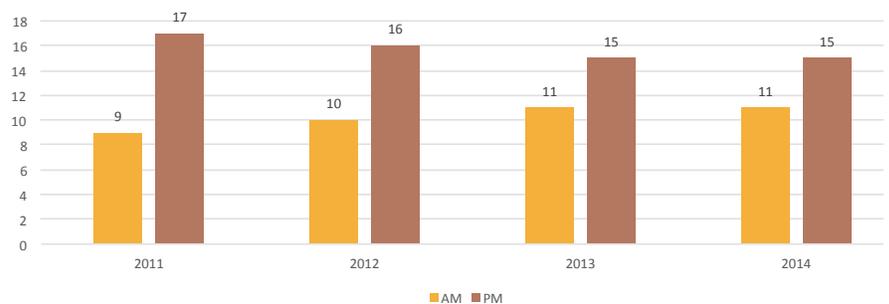
Percent of VMT in Congested Conditions on Maryland Freeways and Arterials in the AM/PM Peak Hours

This measure represents the percentage of peak hour VMT on Maryland highways that occur in congested conditions. Congestion on freeways is said to occur when the travel time index (TTI) ratio is greater than 1.3 (traffic travels at 25 percent slower than the free flow speed). Congestion on arterials is said to occur when the traffic Level of Service (LOS) is rated E, or worse, on a scale of A through F. These congestion metrics are a good indicator of customers' experience on roadways in morning and evening peak hours. The share of VMT on the freeways/expressways which occurred in congested conditions is generally higher than the share for arterial roadways. Peak hour congestion is dominated by non-discretionary trips including goods movement, commute and school trips. Reduced congestion and enhancing the reliability of peak hour trips make Maryland more attractive for economic development and provide users with a high quality safe, efficient and reliable highway system.

Average Share of VMT in Congested Conditions – Freeways



Average Share of VMT in Congested Conditions – Arterials



Facilitate Economic Opportunity in Maryland

TANGIBLE RESULT DRIVER:

Jim Dwyer
Maryland Port Administration (MPA)

PERFORMANCE MEASURE DRIVER:

Jack Cahalan
Maryland Aviation Administration (MAA)

PURPOSE OF MEASURE:

To demonstrate the percent of scheduled nonstop destinations served by BWI Marshall against the total number of nonstop destinations served by the region's three major airports.

FREQUENCY:

Quarterly

DATA COLLECTION METHODOLOGY:

Air service schedule analysis

NATIONAL BENCHMARK:

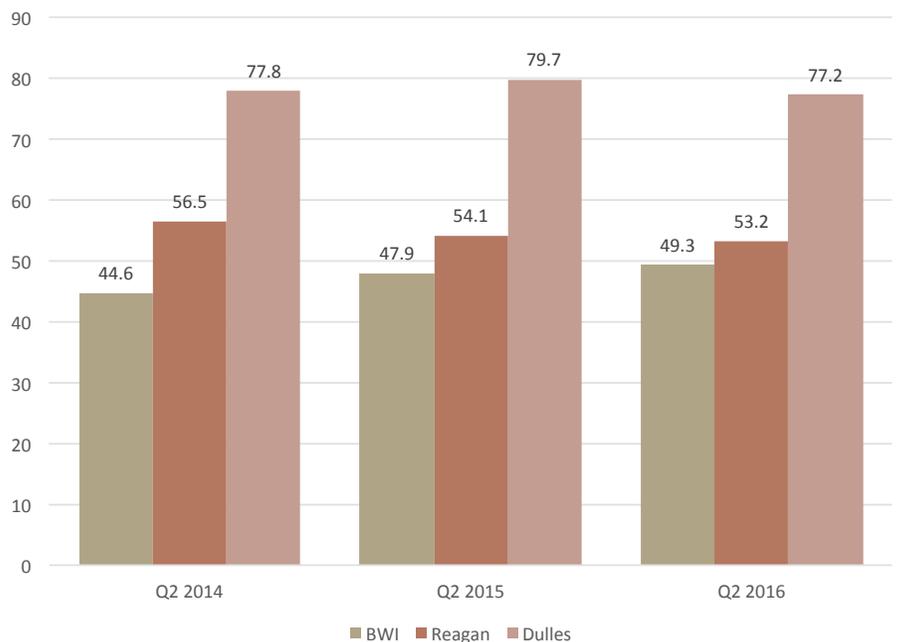
Reagan National Airport; Dulles International Airport

PERFORMANCE MEASURE 10.9A

Market Share: Percent of Nonstop Markets Served Relative to Benchmark Airports

The Washington-Baltimore region is served by three primary airports. They include: Baltimore/Washington International (BWI) Thurgood Marshall Airport; Ronald Reagan National Airport; and Dulles International Airport. More than 23.8 million passengers flew through BWI Marshall in 2015, an all-time record for passenger traffic at BWI Marshall. This upward trend continued in the second quarter of 2016. In June 2016, 2,347,077 passengers flew through BWI Marshall Airport. That figure was an increase of 7.6 percent over the same month in 2015 and a new passenger record for the month of June. It was the twelfth-straight monthly record for BWI Marshall. International passenger traffic climbed by 15 percent in June. The chart below demonstrates that BWI Marshall serves nearly 50 percent of the total number of nonstop destinations served by the region's three airports. The number of nonstop destinations an airport serves is an important metric, as nonstop service is preferred by passengers.

Percent of Nonstop Markets Served Relative to Benchmark Airports



Facilitate Economic Opportunity in Maryland

TANGIBLE RESULT DRIVER:

Jim Dwyer

Maryland Port Administration (MPA)

PERFORMANCE MEASURE DRIVER:

Jack Cahalan

Maryland Aviation Administration (MAA)

PURPOSE OF MEASURE:

To demonstrate Martin State Airport's share of the general aviation business in the Baltimore region.

FREQUENCY:

Quarterly

DATA COLLECTION METHODOLOGY:

Operations Network Data compiled by the Federal Aviation Administration

NATIONAL BENCHMARK:

General aviation activity at BWI Marshall's general aviation facility

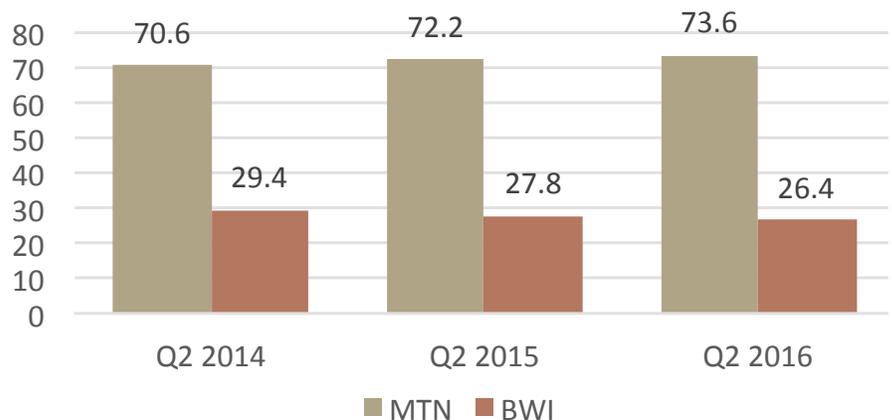
PERFORMANCE MEASURE 10.9B

Market Share: Martin State Airport's Regional Market Share

Martin State Airport is a general aviation facility located in eastern Baltimore County, Maryland serving the general aviation needs of the Baltimore region. It is owned and operated by the State of Maryland. This performance measure gauges the percentage of itinerant general aviation activity at Martin State Airport as compared to the itinerant general aviation activity at BWI Marshall. Itinerant general aviation activity is defined as a flight where its origin or destination takes it beyond the electronic control of the local control tower. This measure captures the amount of discretionary use of Martin State Airport by the business and general aviation community flying in and out of the Baltimore region.

The volume of itinerant general aviation operations is an indicator of how much business traffic Martin State Airport is, or is not, attracting. The more itinerant operations, the more in potential fuel sales and other support operations occur at Martin State Airport. Such operations generate revenue and support existing jobs at the airport among support services, as well as supporting jobs within the general area surrounding Martin State Airport (hotels, restaurants, rental car, etc.).

Percent of Q2 Itinerant General Aviation Activity 2014-2016



Facilitate Economic Opportunity in Maryland

TANGIBLE RESULT DRIVER:

Jim Dwyer

Maryland Port Administration (MPA)

PERFORMANCE MEASURE DRIVER:

Jack Cahalan

Maryland Aviation Administration (MAA)

PURPOSE OF MEASURE:

To determine market share in Baltimore/Washington region by tracking number of passengers and departing flights at BWI Marshall compared to other airports in the region.

FREQUENCY:

Quarterly

DATA COLLECTION METHODOLOGY:

Air service schedule analysis

NATIONAL BENCHMARK:

Reagan National Airport; Dulles International Airport

PERFORMANCE MEASURE 10.9C

Market Share: Number of Passengers and Departing Flights Relative to Benchmark Airports

The Washington-Baltimore region is served by three primary airports. They include: Baltimore/Washington International (BWI) Thurgood Marshall Airport; Ronald Reagan National Airport; and Dulles International Airport. More than 23.8 million passengers flew through BWI Marshall Airport in 2015, an all-time record for passenger traffic. This upward trend continued in the second quarter of 2016. Due to the seasonal nature of air service schedules, the most valid way to track performance is a comparison of identical quarters in prior calendar years. BWI Marshall Airport's percentage of both passengers served and departing flights steadily increased between the second quarter of 2014 and the same time period in 2016. The increases were due primarily to continued growth by Southwest, jetBlue and Spirit airlines. In the second quarter of 2016, BWI Marshall Airport served more passengers than any other airport in the region.

BWI is first in market share of passengers and third in market share of number of departing flights. This is because Reagan National handles a great deal of commuter flights which use smaller aircraft and carry fewer passengers. This fact results in a larger number of overall departures at Reagan than BWI Marshall. This "commuter factor" is also present, to a lesser degree, at Dulles. By comparison, BWI Marshall handles relatively few commuter flights.

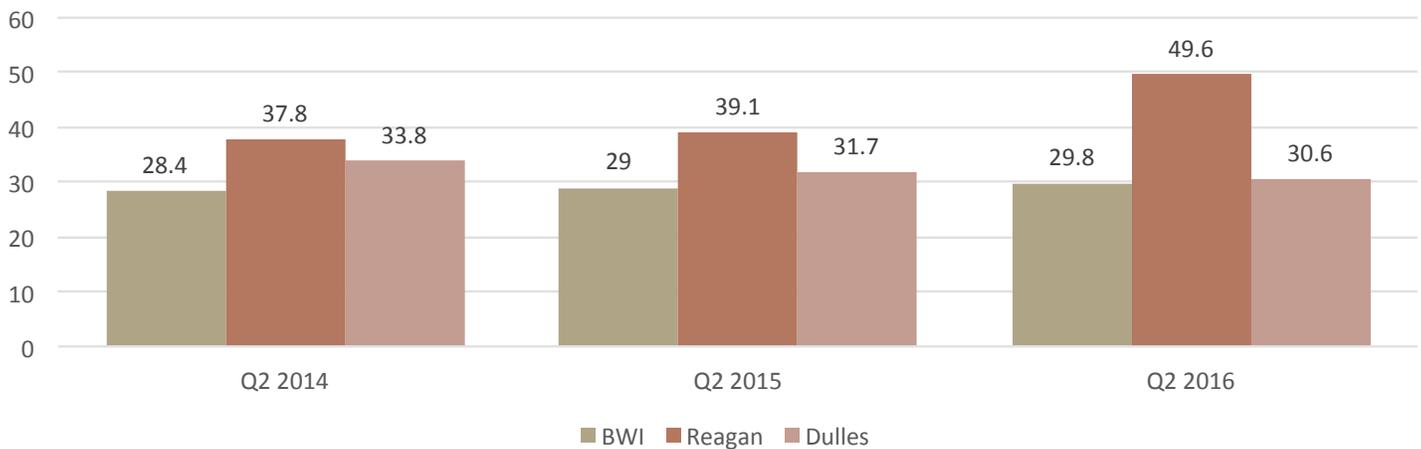
By contrast, the overwhelming majority of flights at BWI Marshall involve regularly scheduled longer distance flights using standard size commercial aircraft like the Boeing 737 flown by Southwest Airlines, which is responsible for 70 percent of the traffic at BWI Marshall. As an example, a commuter jet may carry 50 passengers where a 737-800 model aircraft flown by Southwest will carry 175.

Facilitate Economic Opportunity in Maryland

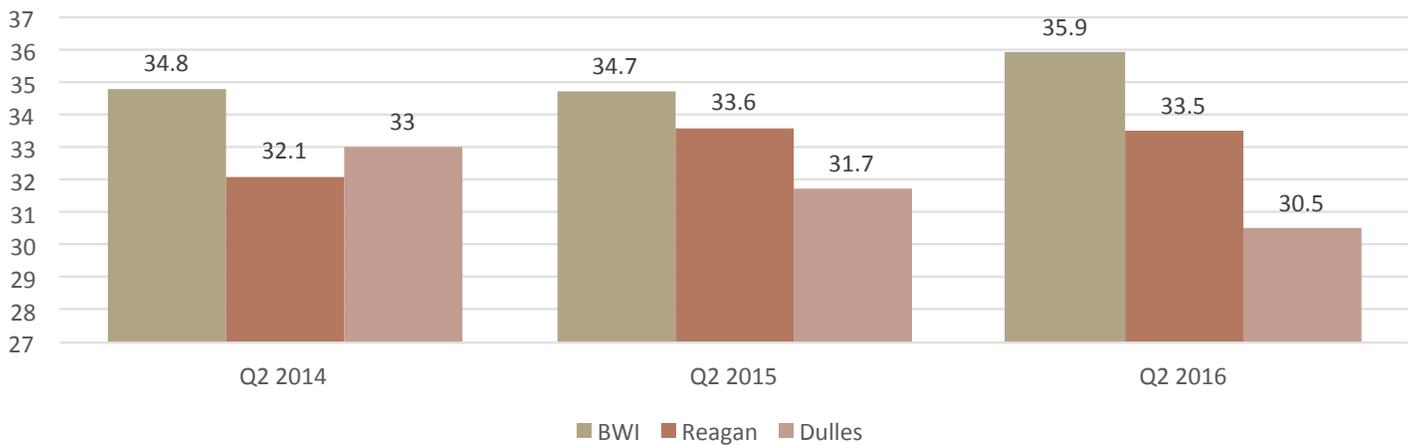
PERFORMANCE MEASURE 10.9C

Market Share: Number of Passengers and Departing Flights Relative to Benchmark Airports

Percent Total Daily Departures at the Region's Airports Q2 2014-2016



Percent Total Passengers Served by the Region's Airports Q2 2014-2016



Facilitate Economic Opportunity in Maryland

TANGIBLE RESULT DRIVER:

Jim Dwyer
Maryland Port Administration (MPA)

PERFORMANCE MEASURE DRIVER:

Jack Cahalan
Maryland Aviation Administration (MAA)

PURPOSE OF MEASURE:

To demonstrate how the cruise operation at the Port of Baltimore performs against the number of cruise ship arrivals at other mid-Atlantic ports.

FREQUENCY:

Quarterly

DATA COLLECTION METHODOLOGY:

Self-reporting by the various cruise terminals

NATIONAL BENCHMARK:

New York, NY; Bayonne, NJ; Norfolk, VA

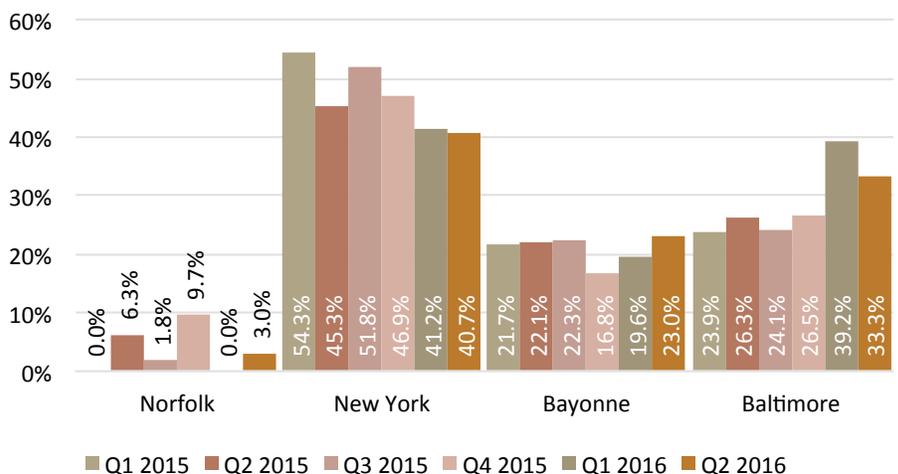
PERFORMANCE MEASURE 10.9D

Market Share: Mid-Atlantic International Cruise Market Share

The Port of Baltimore is one of four mid-Atlantic ports that offer passenger cruise service to destinations including the Caribbean, Bahamas, and Bermuda. Other ports include: New York, NY; Bayonne, NJ; and Norfolk, VA. Both Royal Caribbean and Carnival cruise lines offer diverse, year-round sailings from Baltimore. In the first half of 2016, Baltimore's international cruise ship arrivals outperformed the market compared to the same period of the prior year. Baltimore's increase was due to Carnival Pride's return with winter cruises after being repositioned from Tampa, FL. New York's numbers declined as they saw fewer cruise ship calls because Disney and MSC did not return in 2016. The Port Liberty Terminal in Bayonne, NJ was flat with the same number of cruises. Baltimore is 2nd in the Mid-Atlantic, and its market share is on a positive trend. Located just 2.5 miles from Baltimore's Inner Harbor and 10 miles from BWI Marshall Airport, the Port of Baltimore is easily accessible to the Baltimore/Washington-Northern Virginia region, recognized as one of the most populated and affluent in the nation.

Strategies underway at POB to attract additional cruise business and increase market share include: replace damaged gangway; construct VIP Lounge; install new PA and alarm system; A/C improvements to the breezeway; and exterior signage/circulation improvements.

Market Share, Mid-Atlantic International Cruise Ship Arrivals, (Calendar Year Quarters)



Facilitate Economic Opportunity in Maryland

TANGIBLE RESULT DRIVER:

Jim Dwyer
Maryland Port Administration (MPA)

PERFORMANCE MEASURE DRIVER:

Del T. Adams
The Secretary's Office (TSO)

PURPOSE OF MEASURE:

To improve customer service with a predictable, consistent and transparent process for obtaining an access permit for development in Maryland.

FREQUENCY:

Annually (in January)

DATA COLLECTION METHODOLOGY:

Reviews, permits and delivery times are tracked in the Access Management Database.

NATIONAL BENCHMARK:

N/A

PERFORMANCE MEASURE 10.10

Percent of Roadway Access Permits Issued within 21 Days or Less

An access permit is used to help promote safe and efficient roads for travel while supporting economic growth for jobs and businesses. Issuing access permits and construction of roadway and entrance improvements by developers are some of the last steps before opening businesses and/or selling commercial or residential properties for occupancy. This contributes to a larger tax base for the State, creation of jobs for businesses and redevelopment of vacant properties.

This measure tracks SHA efforts to improve customer service with a predictable, consistent and transparent process for obtaining an access permit in Maryland. The target percentage is at least 90 percent of permits issued within 21 days (after receipt of a complete application package). In the recent past, between 125 and 150 completed applications have been received annually.

Percent of Permits Issued in 21 Days

