

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 Consolidated Transportation Program (CTP) process

NATIONAL BENCHMARK:

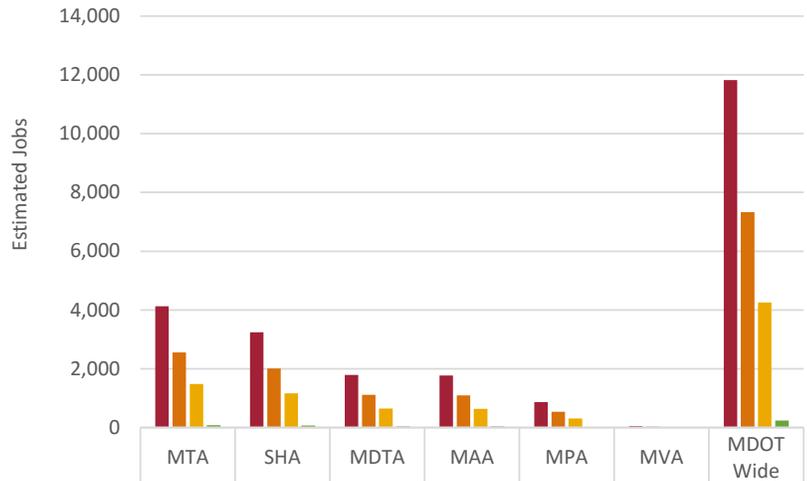
N/A

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 Estimated Jobs Created by Business Unit
Constructor Program – Major Projects**



	MTA	SHA	MDTA	MAA	MPA	MVA	MDOT Wide
■ Total Jobs*	4,125	3,239	1,789	1,766	861	45	11,825
■ Direct/Indirect (62%)	2,558	2,008	1,109	1,095	534	28	7,332
■ Induced (36%)	1,485	1,166	644	636	310	16	4,257
■ Other (2%)	82	65	36	35	17	1	236

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

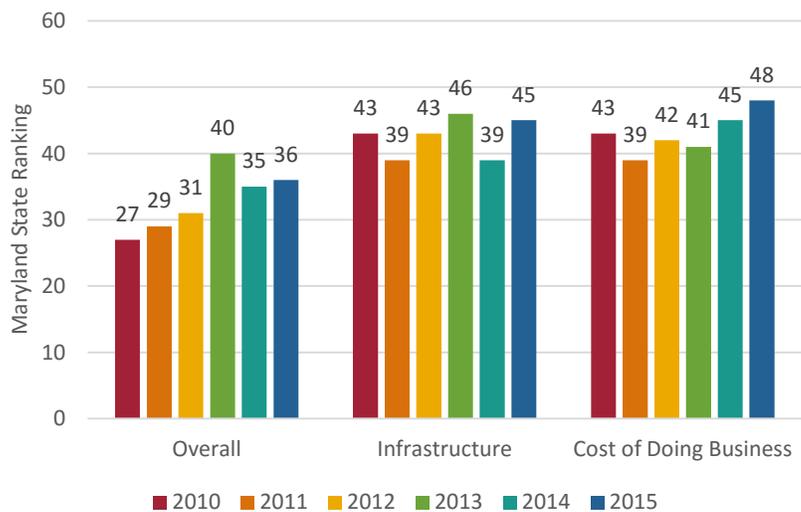
PERFORMANCE MEASURE 10.2

National Ranking of Maryland's Transportation Infrastructure

Comparing Maryland's transportation infrastructure with that of other states ensures that Maryland strives to provide the best possible transportation solutions.

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. Maryland's scores for transportation have been in the bottom tier of nationwide ranking due to the inclusion of congestion as a key input into the calculation. The annual rankings can be used as a national benchmark for economic activity over time as a means for comparing Maryland's standings versus other states.

Annual CNBC Rankings for Maryland in Select Categories



Source: CNBC. America's Top States for Business 2015.

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.

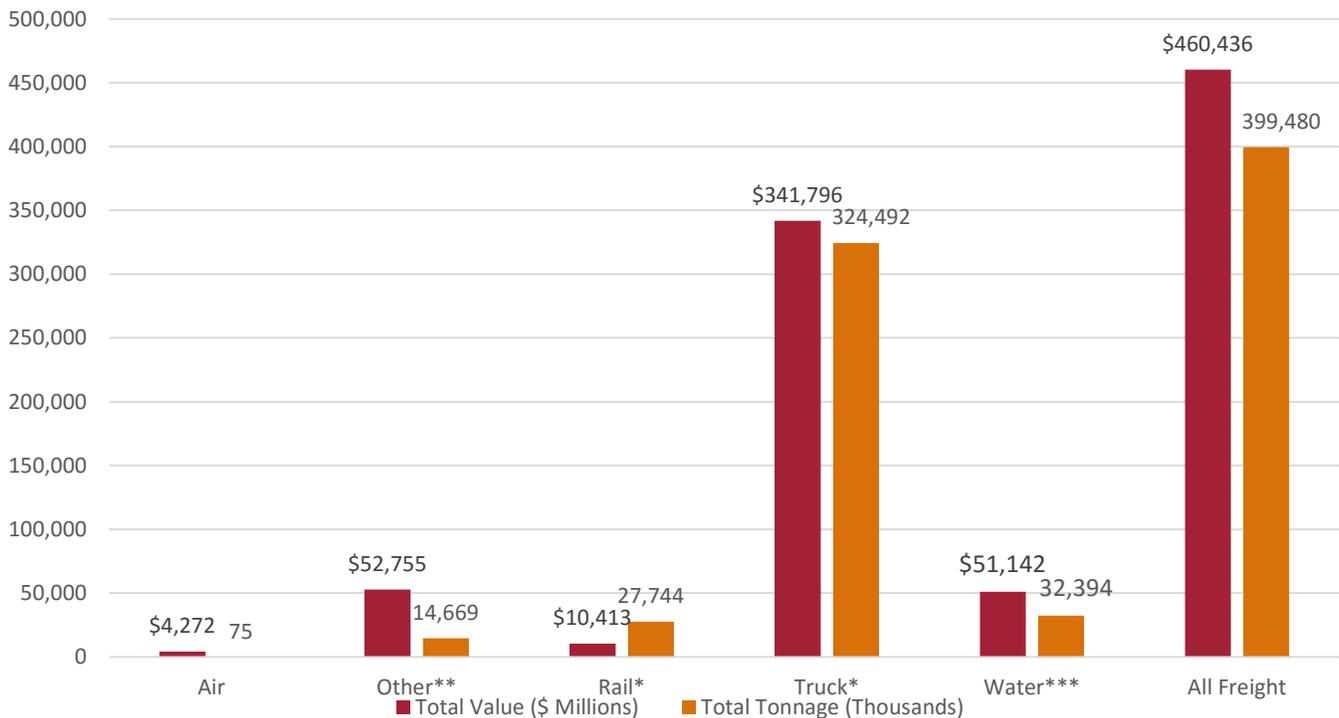


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PERFORMANCE MEASURE 10.3A

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

2015 Freight Originating and Terminating in Maryland



* Source: U.S. Department of Transportation Freight Analysis Framework (FAF3) Version 3. Other, Rail, and Truck value and tonnage data is estimated based on FAF3 data. The data is adjusted yearly to account for previous year actual data and a 2% annual growth rate consistent with the Federal Highway Administration's Freight Summary 2008. The 2% growth rate reflects a conservative estimate of domestic and international freight growth given current economic conditions.

** Freight consists largely of postal and courier shipments weighing less than 100 pounds and other intermodal combinations.

*** International cargo through the Port of Baltimore in 2015, source: MPA.

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

Baltimore's market share increased for the past three quarters; however, due to decreased demand for export bulk coal volumes, (885,000 tons), it is less than the same quarter in 2015. Imported bulk cargos also decreased because there were fewer iron ore imports during the first Quarter (Q1) of 2016. Iron ore imports fell over 300,000 tons from Q1 2015. It is noteworthy that the Port's Q1 international general cargo tonnage increased more than any other Mid-Atlantic port. In Q1 of 2016, Baltimore outperformed the markets for several key commodities: Containers; Autos; Roll-on; Roll-off Heavy Equipment (RoRo); and Imported Forest Products.

Concerning General Cargo - POB saw the largest percentage increase in containers mainly because of the "2M" services, the Maersk and Mediterranean shipping company, an alliance of the two largest container shipping companies in the world. Strong import auto tonnage from Fiat made Baltimore the largest import port on the East Coast. Georgia Ports saw a decline in their import auto tonnage because of Volkswagen's move to Jacksonville in May 2015. Baltimore still remains the top Roll-on/Roll-off (Ro/Ro) port on the East Coast. Georgia Ports' RoRo numbers fell as construction machinery imports slowed. Low commodity prices on both agricultural products and minerals are still keeping sales of farm and mining equipment suppressed. The POB saw an increase in imported paper tons as Metsa has shifted some imports through Baltimore.

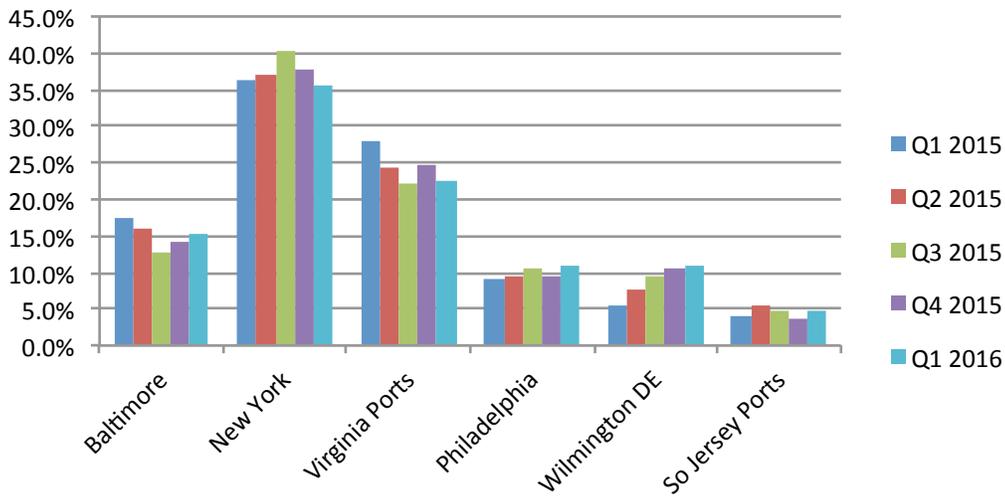
Concerning the market place - Bulk imports through New York dropped mainly due to a decrease in non-crude oil imports which were down 1.2 million tons. Some of this drop was offset by a 567,000 ton increase in crude oil imports. Imports of salt also fell by 260,000 tons. Norfolk, like the POB, saw a large drop in coal exports, i.e. down 3 million tons in Q1 2016. All ports along the Delaware River saw increases in bulk imports mainly due to large increases in crude oil imports. Crude oil imports rose from 3.8 million tons in Q1 2015 to 7.9 million tons in Q1 2016. Wilmington saw a small decrease in its oil exports while ports in South Jersey (Paulsboro) saw small increases in oil exports.

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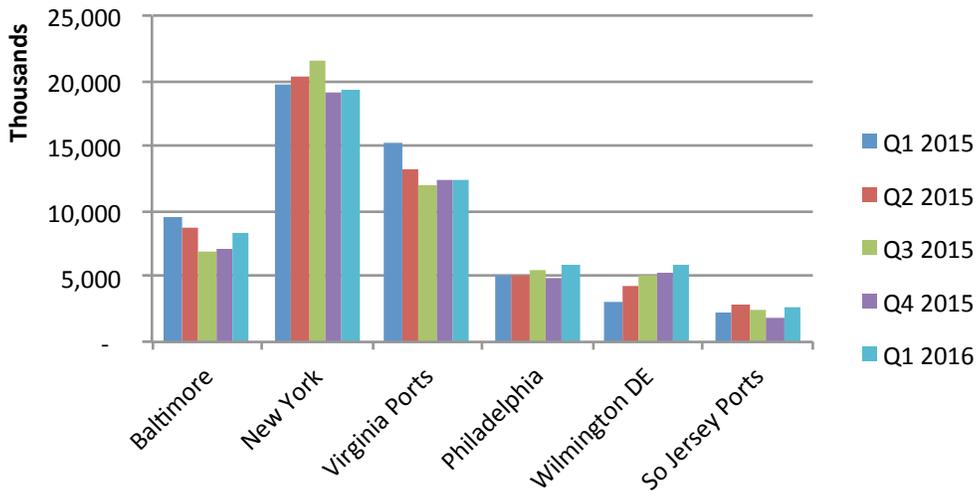
PERFORMANCE MEASURE 10.3B

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

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



Mid-Atlantic Ports, International Cargo, (Tons, 1000s)

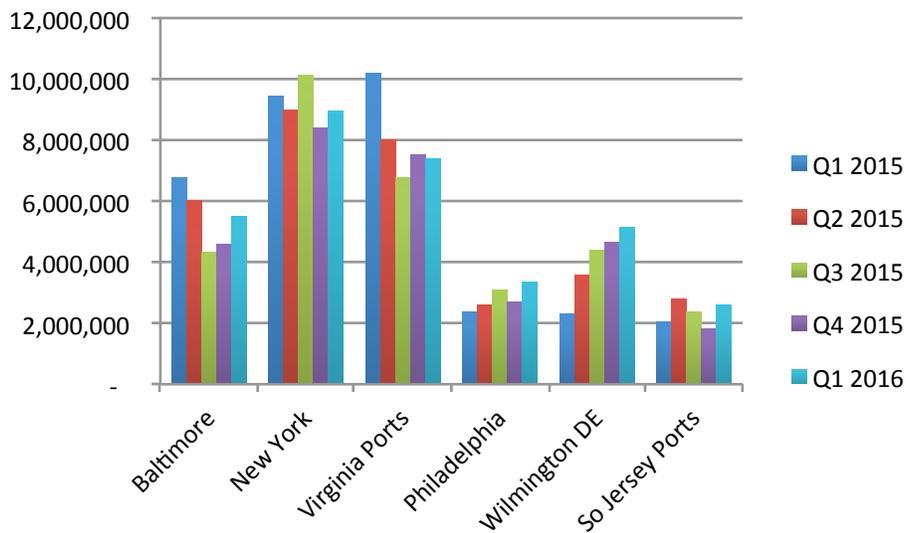


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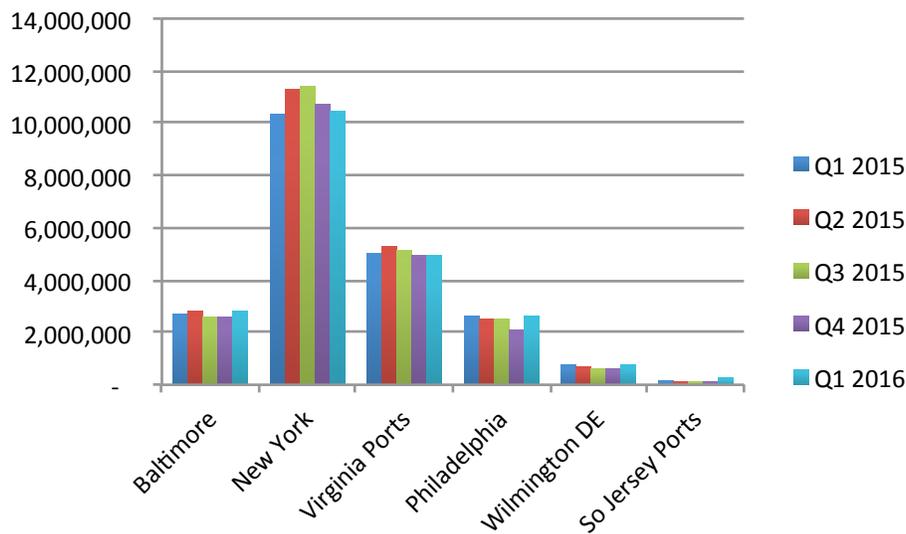
PERFORMANCE MEASURE 10.3B

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

Mid-Atlantic Ports, International Bulk Cargo, (Tons, 1000s)



Mid-Atlantic Ports, International General Cargo, (Tons)



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 the 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

Freight Mobility: MPA Total General Cargo Tonnage Including Containers, Autos, RoRo and Imported Forest Products

MPA's tonnage has grown each month for the past five months. This trend is likely to continue since the busy summer season for containerized goods approaches as retailers make ready for the holidays.

POB saw a large increase in containers mainly because of the "2M" services, the Maersk and Mediterranean shipping company, an alliance of the two largest container shipping companies in the world.. Strong import auto tonnage from Fiat made Baltimore the largest import port on the East Coast. Baltimore still remains the top Roll-on/Roll-off (Ro/Ro) port on the East Coast. Low commodity prices on both agricultural products and minerals are still keeping sales of farm and mining equipment suppressed; plus the strong U.S. dollar discourages exports. The port had an increase in imported paper tons as Metsa has shifted more through Baltimore. As a rule of thumb, general cargo generates more jobs per ton than bulk commodities.

Baltimore's rankings in targeted commodities are:

- Containerized cargo – 3rd in Mid-Atlantic
- Autos and Light Trucks – 1st in East Coast
- Roll-on; Roll-off Heavy Equipment – 1st on East Coast
- Imported Forest Products – 2nd in Mid-Atlantic

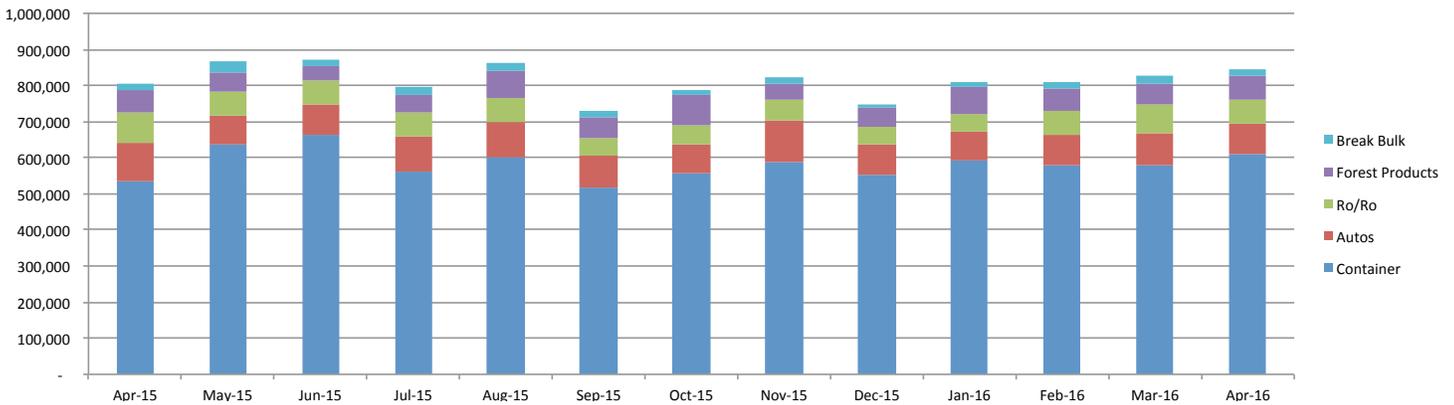
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PERFORMANCE MEASURE 10.3C

Freight Mobility: MPA Total General Cargo Tonnage Including Containers, Autos, RoRo and Imported Forest Products

MPA's diverse commodities have performed well and recovered from the global recession. Total volumes are stable. Container and auto volumes continue to grow and the long term future is promising with the advent of larger ships and the expanded Panama Canal.

MPA General Cargo (Tons, 1000s)



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

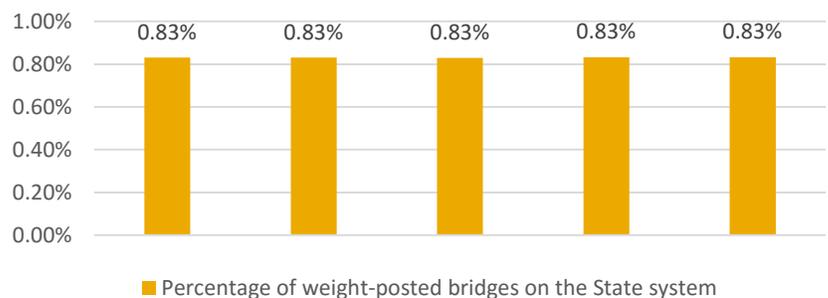
PERFORMANCE MEASURE 10.4

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.

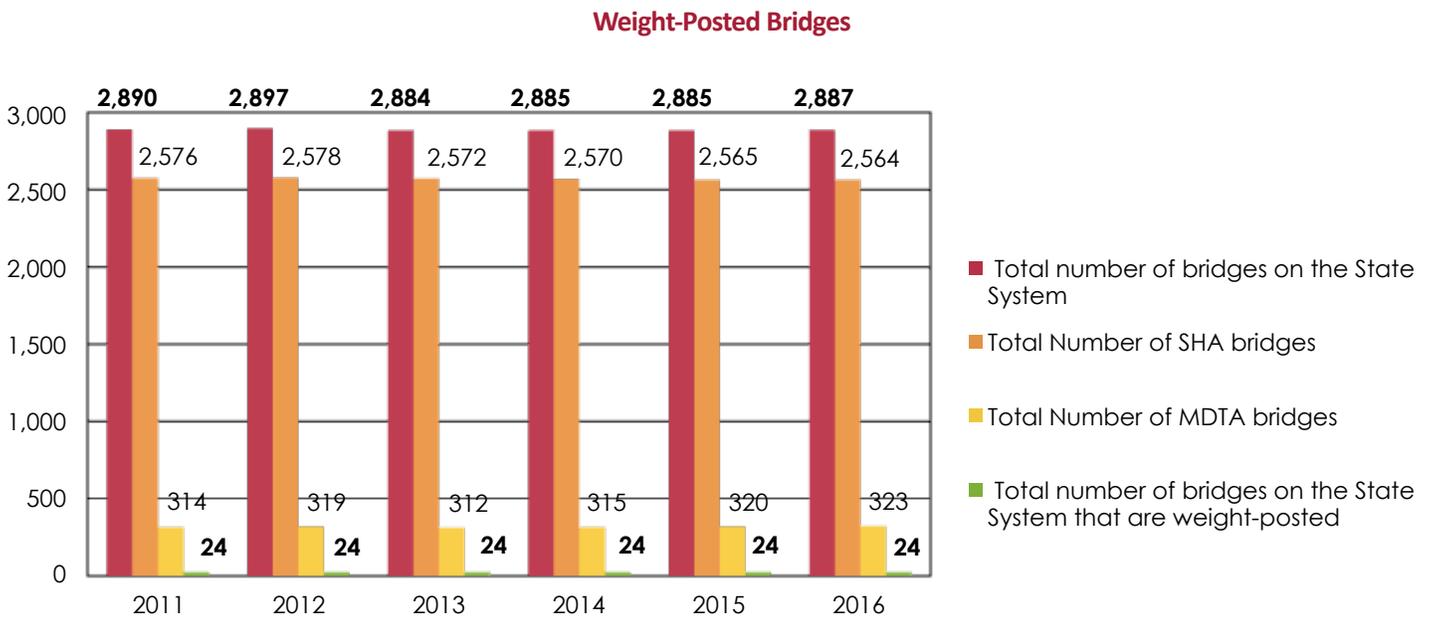
Percentage of Weight-Posted Bridges on the State System



Facilitate Economic Opportunity in Maryland

PERFORMANCE MEASURE 10.4

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



*Weight restrictions on three bridges were removed in 2015 as vehicle causing restrictions has been phased out and is no longer a legal vehicle. Reduction will be reported in 2016.

Data reflects Federal reporting in April of each year.

**The bridge count may have change over time for any one or more of the following reasons: additional bridges added or removed as a result of new projects (the I-95 ETL project is an example); multiple bridges merged into one or vice versa; some bridges which no longer carry live traffic will get excluded from the count; and bridge ownership changes (to/from Baltimore City, for example). The bridge count is anticipated to change for 2016 after the April data submission.

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 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 10.5

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.

Facilitate Economic Opportunity in Maryland



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 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.



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:

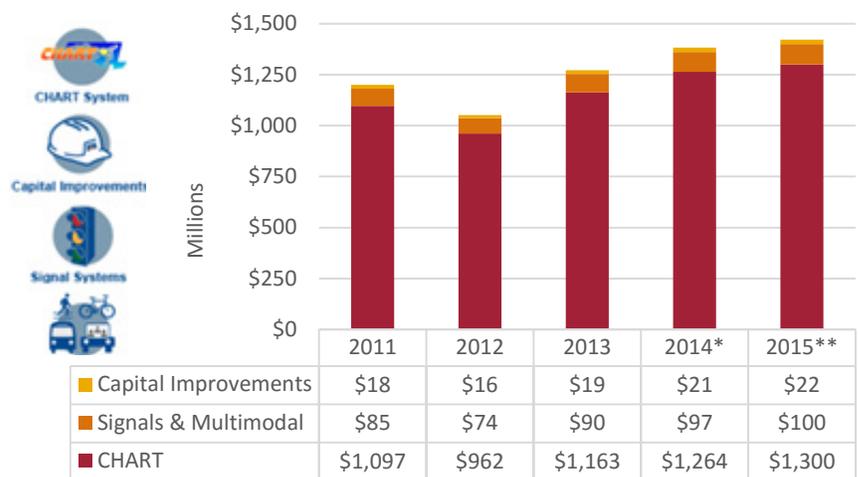
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PERFORMANCE MEASURE 10.7

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



¹ MDTA savings are not included in current methodology. MDTA savings will be added to future TR methodology.

** 2014 data revised from previous Attainment Report

** 2015 data is preliminary and subject to change.
Target: \$1,000 Million Annually

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:

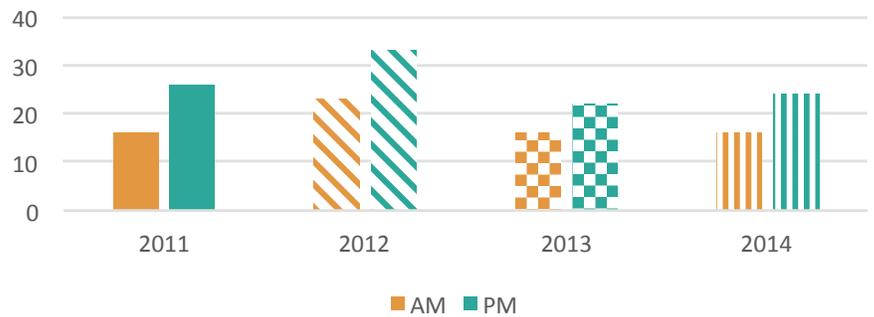
N/A

PERFORMANCE MEASURE 10.8

Percent of Vehicle Miles Traveled (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% 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:

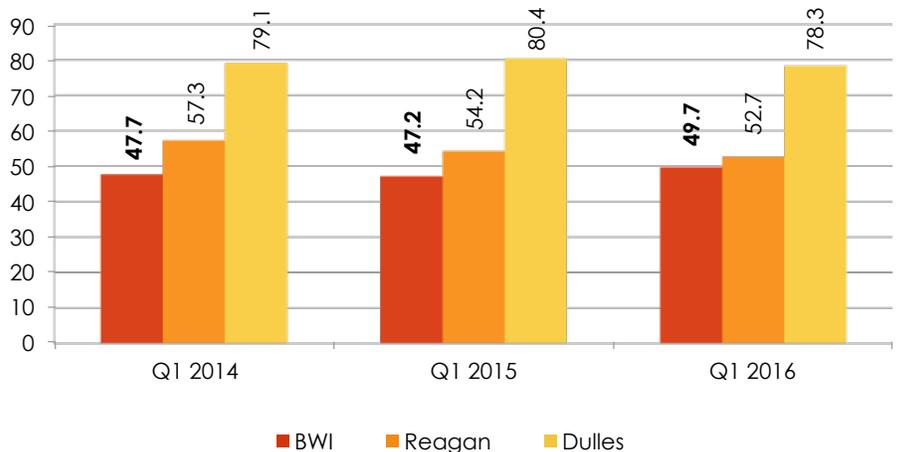
Reagan National Airport;
Dulles International Airport

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 first quarter of 2016. In March 2016, 2,080,117 passengers flew through BWI Marshall Airport. That figure was an increase of 8.9 percent over the same month in 2015 and a new passenger record for the month of March. It was the ninth-straight monthly record for BWI Marshall. International passenger traffic climbed by 22 percent in March. 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
Percent (%) of Total Nonstop Destinations Served by Region's Three 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

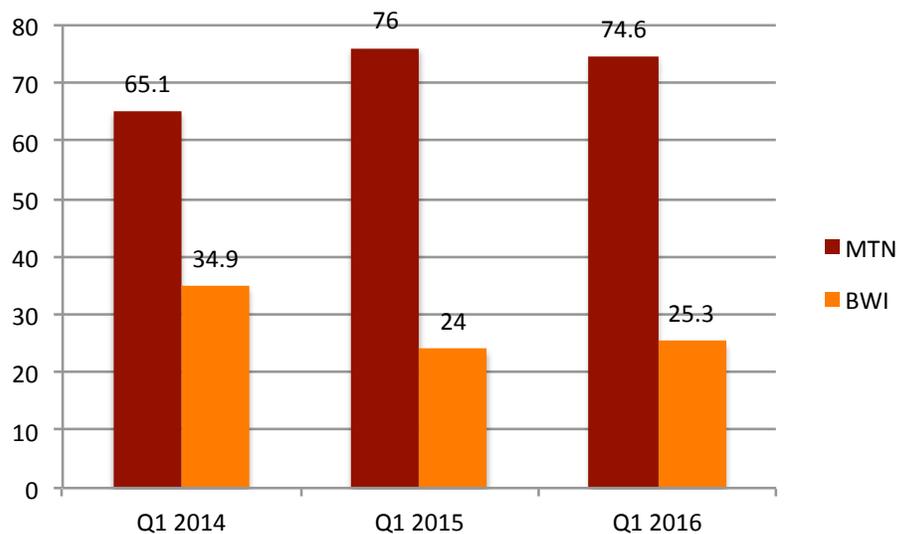
PERFORMANCE MEASURE 10.9B

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 Itinerant General Aviation Activity in CY 2015



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 first 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 first 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 first 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 larger planes carrying more passengers routinely fly out of BWI Marshall while a larger number of commuter flights using smaller planes carrying fewer passengers fly out of Reagan National, and to a lesser degree, Dulles.

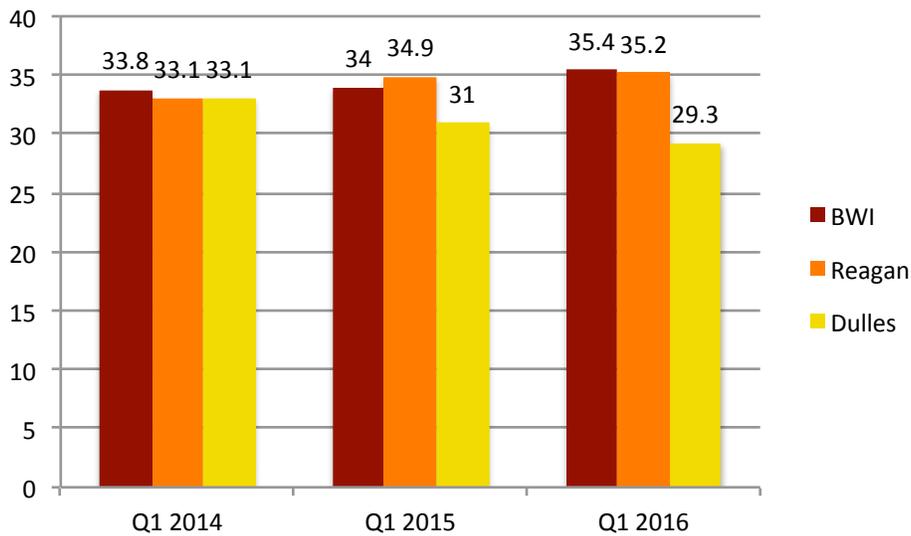
Reagan National handles a great deal of commuter flights which use smaller aircraft and carry fewer passengers. This fact results in a larger number of overall departures at Reagan than BWI Marshall. This "commuter factor" is also present, to a lesser degree, at Dulles. By comparison, BWI Marshall handles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

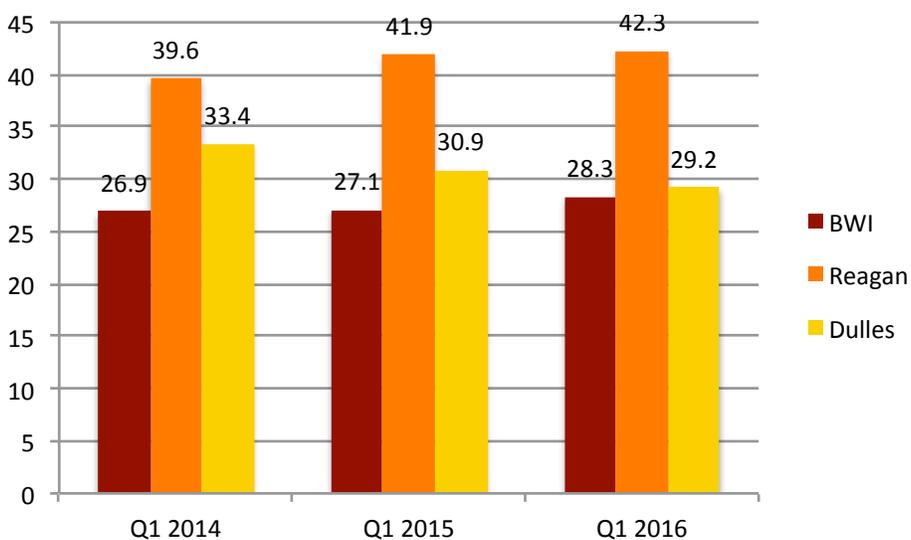
PERFORMANCE MEASURE 10.9C

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

Percent Total Passengers Served by the Region's Airports in CY 2015



Percent Total Daily Departures at the Region's Airports in CY 2015



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

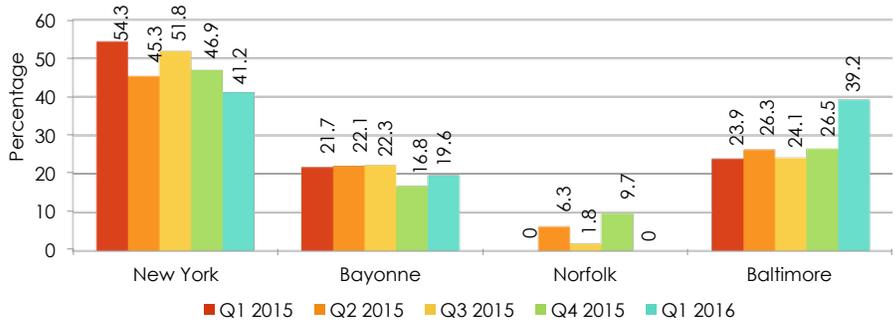
PERFORMANCE MEASURE 10.9D

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 quarter 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 four fewer cruise ship calls because Norwegian Cruise Line altered the Norwegian Breakaway's schedule to longer, but fewer cruises. The Port Liberty Terminal in Bayonne, NJ was flat with the same number of cruises offered during the 2016 winter season. Norfolk did not have any winter cruises in the first quarter. 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; online pre-payment parking options; install new PA and alarm system; and exterior signage/circulation improvements.

Market Share, Mid-Atlantic International Cruise Ship Arrivals



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 October)

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% 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

