



Your Journey Begins with Us

▶ The Brand



Your Journey Begins with Us

▶ Our Commitment

Our Passenger Pledge is to:

- **Serve the traveling public;**
- **Provide a safe, predictable, enjoyable travel experience;**
- **Continuously improve customer service, convenience, innovation and engagement; and**
- **Always advocate for our passengers with all entities affecting their journey.**



DULLES INTERNATIONAL

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▶ The Dulles Customer Experience Just Keeps Getting Better

2nd shortest wait times
in the nation for
international arrivals
processing



Journey
begins here



New close to terminal
daily parking
Free, dedicated
access highway

55 new shops
and
restaurants



***Customers rate Dulles
4.2 out of 5
in overall satisfaction.***



2 new
information
desks added
in 2016

Children's play area
coming June 2016
8 new nursing rooms



Average security wait time
in 2016 less than 4 minutes
Biometric screening option
coming soon (CLEAR)



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Dulles Airport is a Powerful Economic Engine for the Commonwealth

Direct	85,126
Direct, Indirect, Induced	146,122

Jobs

Direct	\$3.0 B
Direct, Indirect, Induced	\$5.9 B

Labor Income

Direct	\$612.9 M
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State & Local Taxes

Virginia state map

Passenger Spending from Dulles Airport Passengers Totals Over \$3 B for Virginia Annually

Annual IAD Passenger Spending in VA	
Lodging	\$1.3 B
Rental Car	\$698.7 M
Food	\$411.5 M
Retail	\$351.7 M
Entertainment	\$284.7 M
Taxi	\$275.4 M
Total Spending	\$3.4 B

Over the last three years, over \$500 million of construction, goods and services were procured from local, small, minority and women-owned businesses for the Airports and the Dulles Toll Road.

The construction of the Silver Line by the Airports Authority has generated over \$520 million in contracts for disadvantaged business enterprises in the region.

Source: MWAA 2012 Economic Impact Study; Willdan Financial and Economic Consulting Services



DULLES INTERNATIONAL

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▶ More Destinations than Any Other Airport in the Region

Nonstop Domestic Service at Dulles International



- AIRLINES**
- | | | |
|----------|-----------------|----------------|
| Alaska | JetBlue | United |
| American | Silver Airways | Virgin America |
| Delta | Southwest | |
| Frontier | Sun Air Express | |

Source: Innovata Airline Schedules, via Diio MI online portal as of January 19, 2016

30 Airlines Serving International Service at Dulles International



- | | | | |
|-------------------|---------------------|----------------|-------------------|
| AIRLINES | DESTINATIONS | | |
| Aer Lingus | United | Dakar | London |
| Aeroflot | Virgin Atlantic | Doha | Madrid |
| Aeromexico | Abu Dhabi | Dubai | Manchester |
| Air Canada | Accra | Dublin | Mexico City |
| Air China | Addis Ababa | Frankfurt | Montego Bay |
| Air France | Amsterdam | Geneva | Montreal |
| All Nippon | Aruba | Grand Cayman | Moscow |
| Austrian | Beijing | Guatemala City | Munich |
| Avianca | Qatar Airways | Istanbul | Ottawa |
| British Airways | Royal Air Maroc | Jeddah | Panama City |
| Brussels Airlines | SAS | Johannesburg | Paris |
| Copa Airlines | Saudia | La Paz | Punta Cana |
| Delta | South African | Lima | Reykjavik |
| Emirates | Turkish Airlines | Lisbon | Riyadh |
| | | | Rome |
| | | | Saint Maarten |
| | | | San Jose |
| | | | San Jose Del Cabo |
| | | | San Salvador |
| | | | Sao Paulo |
| | | | Seoul |
| | | | Singapore |
| | | | Tokyo |
| | | | Toronto - YYZ |
| | | | Toronto - YTZ |
| | | | Vancouver |
| | | | Vienna |
| | | | Zurich |

Note: ■ 2016 new airlines or new services. Service to Casablanca by Royal Air Maroc to be added September 2016.
Source: Innovata Airline Schedules, via Diio MI online portal as of January 19, 2016



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Better Shopping and Dining Choices

Complete redevelopment of all concessions throughout the airport

55 new shops and restaurants opened as of December, 2015



Variety of **local, regional and national brands**

Shopping options include local retailers and upscale boutiques



Dining choices include chef-driven, sit-down restaurants and **affordable** “grab and go” meals



15 New Concessions Coming in 2016

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Dulles Rail is a Catalyst to Growth of the Dulles Corridor

Dulles Corridor will be the 4th Largest Business District in the United States



Top 15 U.S. Commercial Business Districts

DOWNTOWN	TOTAL INVENTORY SIZE (SF)	RANKING
Manhattan	397,935,715	1
Chicago	127,034,311	2
Washington, D.C.	125,140,112	3
Dulles Corridor (Projected)	90,974,300	4
Boston	78,594,505	5
San Francisco	76,568,290	6
Atlanta	48,993,203	7
Seattle	44,048,571	8
Philadelphia	43,632,159	9
Houston	42,621,964	10
Pittsburgh	37,215,114	11
Minneapolis/St. Paul	32,016,801	12
Los Angeles	31,760,927	13
Tysons (Current)	25,887,150	14
Denver	25,757,875	15

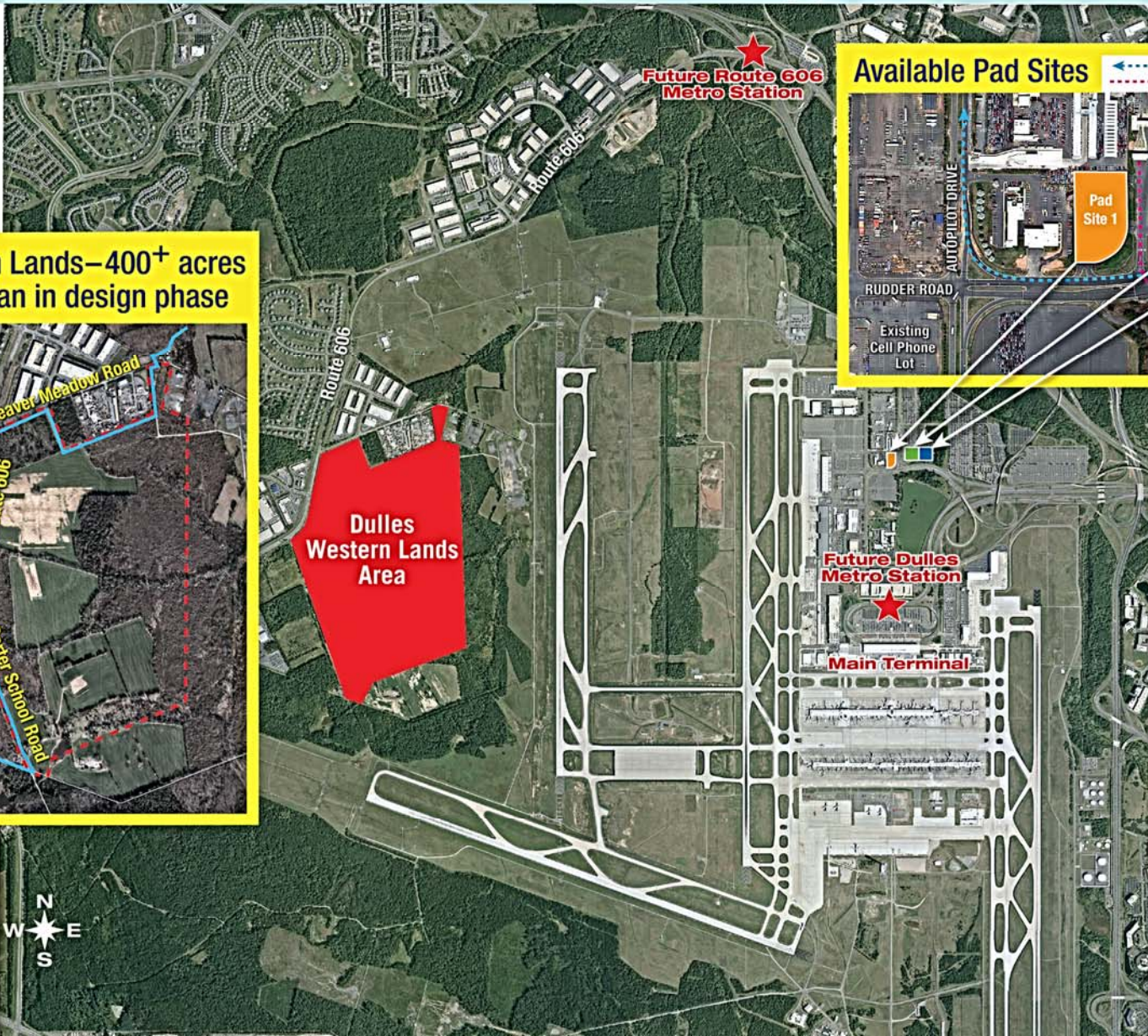
Source: CBRE



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Dulles is Rich with Development Opportunities



Western Lands—400+ acres
Site Plan in design phase



Available Pad Sites



New Fueling and
Convenience Store
Opening December 2016



Pad Site 1 available
1/1/17

Pad Site 2 currently
under option

Up to 5-acre outdoor
storage sites available
at the "South 40" Lot