

## SECTION 7

### THE AIRPORT IMPROVEMENT PROGRAM

(Source: City of Dayton Department of Aviation)

The Dayton International Airport spans over 4,500 acres in both Montgomery and Miami Counties. The airport encompasses approximately 4.7 miles of runway and has more than 650 acres of non-aeronautical readily developable land. Even with recent mergers, the Dayton International Airport is fortunate to be served by all commercial major airlines. There are approximately 29 daily arriving and departing flights from 12 active airline gates that provide nonstop service to 12 destinations and one-stop service to all major U.S. cities and beyond. It goes without saying that the Dayton International Airport is the region's key component in growing and preserving our economy. According to State of Ohio data, the Dayton International Airport has a \$1 Billion economic impact on the regional economy.

#### The Past 5 Years

In the past 5 years, the airport completed the Public Entrance Renovation project (Phase I of the Airport Terminal Modernization Program). The Program is based on the Terminal Master Plan which is designed to substantially reconfigure and improve the airport terminal and enhance the passenger's experience.

The Public Entrance Renovation project delivers a fresh environmentally friendly design to present a more modern front door to the airport. The new design creates a more open configuration with greater daylight and a brighter feel while still providing good protection of people and vehicles at the curb. New wide expanses of glazing (glass) along the exterior facade brings natural light into the terminal and improves visibility of transportation arrivals and departures. New brighter and energy efficient lighting enhances the customer experience and saves energy. The sidewalk has been re-graded, removing the curb to make it more ADA accessible. It is easier to load and unload passengers and their luggage and helps alleviate congestion. A copy of the Terminal Master Plan may be found on the Dayton International Airport website, FlyDayton.com, at <http://www.flydayton.com/wp-content/uploads/2016/10/DAY-Terminal-Master-Plan-10-25-16.pdf>.

The airport continues to implement an Airport Sustainability Master Plan. The goal is to maintain and enhance The Dayton International Airport as a vibrant asset that serves the needs of the Dayton-Miami Valley residents and businesses, promotes economic growth in the region, and operates in an economically and environmentally sustainable manner. By doing so, it conserves natural resources and protects the entire airport environment.

To compliment the Public Entrance Renovation project, the airport completed efficiency upgrades to the heating ventilation and air conditioning (HVAC) systems in the main terminal. These upgrades are designed to be energy efficient and are estimated to reduce the airport energy usage by 25%. The upgrades include the replacement of the heating boilers, re-piping the chilled water system, installing new air control boxes and adding state-of-the-art building controls.

Additionally, the Airport completed the Sanitary Sewer Phase II project. This project redirected the main airport campus and development areas sanitary flow from the Vandalia sewer system to the Montgomery County and City of Dayton sewers. This enhanced the capacity of the

airport sanitary sewer system and is allowing it to serve the recently established distribution facilities as well as attracting new Economic Development to the Airport.

## **The Future**

Progress on the Airport Terminal Modernization Program continues. This past year, we began the Public Circulation Enhancement project (Phase IIa). It widens the checkpoint and extends the modern look of Phase I with the terrazzo flooring, updated energy efficient lighting and finishes passed the check point inside the terminal. We also enlarged the windows in Concourse “A” to enhance the natural lighting in step with our Sustainability Plan. The project is scheduled to be complete in early 2023.

Design is underway for the next phases of the Program as we continue to enhance the passenger experience. These next phases include the replacement of the Escalators and Elevators and modernizing Concourses A & B with updated mechanicals, energy efficient lighting, finishes, and carpet.

## **Airport Master Plan**

Begun in late 2018, the Airport has been updating its Airport Master Plan (not to be confused with the Terminal Master Plan described above). An Airport Master Plan is a technical document from an airport management and operation perspective to guide future growth and development. It provides a road map for meeting aviation demand through the foreseeable future while preserving the flexibility necessary to respond to changing industry trends. To supplement the master plan document, an Airport Layout Plan (ALP) is used to graphically depict the existing and proposed conditions of an airport.

This Master Plan update looks at the last 12 years and into the next 20 to determine what the airport will look like and how it will function. It includes review of prior planning efforts conducted for the Airport and analyzes market conditions and future facility requirements. This update will reflect the actual conditions today and determine what facility upgrades are needed at Dayton International Airport.

## **Dayton International Airport and Sinclair Community College Aircraft Mechanic Training Center**

The Dayton International Airport and Sinclair Community College, in conjunction with PSA Airlines, are collaborating to develop and renovate a hangar at the airport to create the Sinclair Aircraft Mechanic Training Center. The project is renovating ~14,000 SF for the hangar training center and labs, and ~2,800 SF for the classrooms and administrative office. It contains two classrooms, two lab spaces and will be dedicated to aircraft mechanics and aviation service maintenance, in-demand career fields. The labs have access to the airfield side of the airport which provides valuable hands-on learning opportunities for students to work on commercial and cargo aircraft through PSA Airlines.

The training center will provide significant financial benefits to the region. Graduates of this program will be well-positioned for high-paying mechanic and maintenance jobs with PSA Airlines, Air Wisconsin and other airline and aviation companies, thus strengthening the viability of the Dayton region’s air travel economy.

## Sierra Nevada Corporation New Aerospace Maintenance Facility

Airport development continues as a new tenant (i.e., the Sierra Nevada Corporation, or SNC) has established a new aerospace maintenance facility on the airport that has been specifically designed to accommodate very large aircraft (i.e., Boeing 747 and Lockheed C-5 aircraft). SNC is a Nevada-based provider of advanced technology solutions and open architecture integrations of aircraft electronics. Their initial 90,000sqft hangar is located on a six-acre site on the north side of the airport. We are proud to be the home of SNC's new Ohio operation. It's the first private-sector company to do maintenance, repair, and modification work on military aircraft in Dayton since the World War II era.

## Economic Development

Economic Development around the airport continues to flourish. 7 years ago, Proctor and Gamble opened a 1.8 million square foot distribution center adjacent to the airport, which employs up to 1,400 people. This development sparked recent growth in the immediate area, and in 2016, Chewy opened a 700,000 square foot fulfillment center, growing to 1,200 new jobs today. Furthermore, in 2019, on lands immediately adjacent to the airport, Crocs entered the region with a new 550,000 square foot warehouse and distribution building. The following year, they expanded into a second building and now employ 1,200 people in more than one million square feet of space. Other companies that moved into this area include Spectrum Brands, Pratt Industries, ALPLA, Purina Mills, and General Pet Supply. Combined, these industries have created 2,700 new jobs, with plans to add more.

In 2021, the same developer that invested in most of the new warehouse facilities for the companies referenced above, purchased lands northeast of the airport to develop an additional 500,000 square foot facility that is expected to bring in 400 additional jobs.

Two other developers are building large industrial facilities near the airport. One building will be 1.2 million square feet with 700 employees. Another building is 55,000 square feet and is occupied by Fast Track It, an online auctioneer. In the City of Union, located just west of the airport, Amazon is constructing a new 630,000 square foot fulfillment center, which is expected to bring in 1,500 additional jobs. (Airport Master Plan)

The airlines serving the airport in 2022 are shown in Table 7.1

<b>Code</b>	<b>Airline</b>
AA	American/American Eagle
G4	Allegiant Air
DL	Delta Air Lines, Inc.
UA	United/United Express

Table 7.2 lists the airline groups serving the region, and their 2022 enplanement totals, and percentage of Market Share.

<b>TABLE 7.2 - Passenger Carrier Share of Market</b>		
<b>Carrier</b>	<b>2020 Enplanements</b>	<b>Percent Share</b>
American Airlines (main line)	378	
Envoy Airlines	68,039	
American Airlines (PSA)	155,849	
American Airlines (Skywest)	9,632	
American Airlines (Piedmont)	40,608	
American Airlines (Republic)	14,701	
American Airlines (Mesa)	2,721	
<b>American Airlines Total</b>	<b>291,928</b>	<b>49.9%</b>
Delta Air Lines, Inc.	116,970	
Endeavor Airlines dba DL	25,912	
SkyWest Airlines (Delta)	9,238	
<b>Delta System Total</b>	<b>152,120</b>	<b>26.0%</b>
<b>Allegiant Air</b>	<b>44,004</b>	<b>7.5%</b>
United Airlines (Main Line)	151	
United Express (SkyWest)	9	
United Express (GoJet)	1,698	
United Express (Air Wisconsin)	92,078	
<b>United System Total</b>	<b>93,936</b>	<b>16.10%</b>
<b>Charters</b>	<b>2,499</b>	<b>0.4%</b>

SOURCE: DAY Revised 1/2020

With the Merger of American Airlines with U.S. Airways, American has surpassed Delta Airlines as the largest single passenger carrier, as shown in Table 7.2, at the airport. The number of carriers at the airport has varied over the years mostly due to airline mergers. A joint effort by the City of Dayton; the Dayton Chamber of Commerce, the Dayton Development Coalition, and Jobs Ohio continues to market to prospective passenger airlines in an effort to attract more service. Avelo Airlines announced in November 2022 that they are starting new service from DAY/MCO in January 2023.

As shown in Table 7.3, during 2022, total passenger enplanements at the Dayton International Airport were 584,487. That is an increase of approximately 8.6 percent from total passenger enplanements in 2021. This increase illustrates the beginning of the recovery from the Covid-19 pandemic, where Dayton saw a 62.2 percent drop in enplanements in 2020. In addition to the pandemic, the airline industry is also seeing pilot and staffing shortages, along with fuel prices, that are slowing the recovery.

**TABLE 7.3 - Enplaned Passenger Statistics**

<b>Year</b>	<b>Total Enplanements</b>	<b>Annual Growth</b>
1949	73,994	
1950	77,096	4.20%
1951	114,716	48.80%
1952	136,756	19.20%
1953	159,545	16.70%
1954	184,108	15.40%
1955	223,544	21.40%
1956	253,436	13.40%
1957	282,746	11.60%
1958	285,267	0.90%
1959	331,082	16.10%
1960	325,370	-1.70%
1961	348,842	7.21%
1962	366,770	5.14%
1963	397,770	8.50%
1964	397,353	-0.10%
1965	442,014	11.20%
1966	476,628	7.80%
1967	576,556	21.00%
1968	670,920	16.40%
1969	729,805	8.80%
1970	700,187	-4.10%
1971	688,707	-1.60%
1972	737,926	7.10%
1973	760,872	3.10%
1974	810,517	6.50%
1975	788,918	-2.70%
1976	839,760	6.40%
1977	897,947	6.90%
1978	990,529	10.30%
1979	1,016,883	2.70%
1980	901,458	-11.40%
1981	743,110	-17.60%

<b>Year</b>	<b>Total Enplanements (con't)</b>	<b>Annual Growth</b>
1982	788,465	2.40%
1983	1,248,891	58.40%
1984	1,530,478	22.50%
1985	1,834,813	19.90%
1986	2,244,978	22.40%
1987	2,370,496	5.60%
1988	2,389,439	0.80%
1989	2,346,130	-1.80%
1990	2,085,554	-11.10%
1991	1,988,102	-4.70%
1992	1,107,428	-44.30%
1993	1,044,221	-5.70%
1994	1,337,972	28.10%
1995	1,102,708	-17.60%
1996	989,525	-10.30%
1997	1,011,119	2.20%
1998	1,096,613	8.50%
1999	1,114,190	1.60%
2000	1,183,572	6.20%
2001	1,076,244	-9.10%
2002	1,150,301	6.90%
2003	1,320,248	14.80%
2004	1,445,492	9.50%
2005	1,222,263	-15.60%
2006	1,306,237	6.90%
2007	1,427,630	9.30%
2008	1,468,840	2.90%
2009	1,253,782	-14.60%
2010	1,264,650	0.90%
2011	1,269,106	2.1%
2012	1,304,349	2.8%
2013	1,253,287	-3.9%
2014	1,143,724	-8.7%
2015	1,072,620	-6.2%
2016	1,035,263	-3.5%
2017	950,620	-8.2%
2018	906,003	-4.7%
2019	892,414	-1.5%
2020	337,517	-62.2%
2021	538,420	59.5%
2022	584,487	8.6%

Source: Airport Records, includes charter passengers

## ORIGIN AND DESTINATION PASSENGERS

Origin and destination (O&D) passenger data identify the principal markets for an airport. Washington, D.C., New York and Atlanta respectively, are the three largest markets. The ten largest originating passenger markets from the Dayton International Airport are shown in Table 7.4 as well as whether these cities have scheduled nonstop airline service.

**TABLE 7.4 - Top Ten Market Rank with Current Service YE 3Q 2022**

Rank	Market	Airport(s)	O&D Passengers	Nonstop Service
1	Washington/Baltimore	BWI/DCA/IAD	76,612	Yes
2	Atlanta	ATL	58,820	Yes
3	Dallas/Fort Worth	DFW/DAL	50,948	Yes
4	Tampa/St. Petersburg	TPA/PIE	50,873	Yes
5	Fort Myers	RSW/PGD	42,664	Yes
6	Orlando	MCO/SFB	40,859	Yes
7	New York/Newark	LGA/JFK/EWR	39,058	Yes
8	Chicago	ORD/MDW	37,185	Yes
9	Los Angeles Bason	LAX/SNA/ONT/BUR/LGB	34,886	No
10	South Florida	MIA/FLL/PBI	30,663	No

Source: Diio Mi. (February 8, 2023)

O&D passengers indicate the true measure of an airport's ability to attract local passengers. This data eliminates the influence of connecting passengers.

## AIR CARGO FORECAST

The airport's air cargo witnessed a 6.8% decrease in weight in 2022 compared to YE-2021. FedEx cargo weight has fluctuated throughout the post pandemic years as it deals with the supply chain/recovery of the pandemic aftermath.

## AIRPORT CAPITAL PLAN

A copy of the Airport Capital Improvements Program is attached and shows a listing of the anticipated Airport Improvement Program (AIP) projects for FY 2023-FY2032. Due to current development of the Airport Master Plan, this list is subject to change.

The AIP is an entitlement program provided by the Federal Aviation Administration (FAA). This grant program is a FAA/Airport Match program at a 90%/10%. In addition to the entitlement funds, the airport is eligible for AIP discretionary grants. These grants can only be received if the airport is completing the highest priority projects from the FAA's perspective. The Dayton International Airport competes with other airports around the country for this very competitive source of money. Additionally, the FAA has offered Bipartisan Infrastructure Law funding distributed as the Airport Terminal Program (ATP) and Airport Infrastructure Grant (AIG) funding. The ATP is a very competitive program, and the AIG funding is made available to Dayton International Airport at a pre-determined amount, based on enplanements. The planned


funding is identified in the attached ACIP spreadsheet. Additionally, the airport also utilizes passenger facility charges to fund projects when available and appropriate.



AIRPORT CAPITAL IMPROVEMENT PROGRAM (ACIP) FY-2023 to FY-2032

Airport Name: Dayton International Airport - James M. Cox		2023 AIP Entitlements = \$ 3,800,000.00		2022 Airport Infrastructure Grant= \$ 4,393,860.00		10/4/2022		Date Checked: 2/27/2023		<b>FINAL</b>		
Associated City: Dayton				2023 Airport Infrastructure Grant= \$ 4,300,000.00		YAE		Checked By:				
Sponsor: City of Dayton				2024 Airport Infrastructure Grant= \$ 3,672,969.18		(937)623-1340		Date Printed: 2/27/2023				
				2025 Airport Infrastructure Grant= \$ 3,690,154.91				Date Submitted: 12/20/2022				
				2026 Airport Infrastructure Grant= \$ 4,016,143.65								
Airport Three Letter ID: DAY		Congressional District: 10th of Ohio, City of Dayton		2021-2041 Forecast =								
Item #	Description	Fiscal Year	Total Cost	FAA Entitlement	Federal Funds		FAA Discretionary	State Non-FAA	Local		FAA Carryover Funds	
					ATP (Airport Terminal Program) Discretionary	AIG (Airport Infrastructure Grant) Formula Based			Match	Contingency		
				90%		90%			10%			
	AIP Entitlement Projects - Funding Carried Over to later years	2023									3,800,000	
23-01	<b>AIRPORT INFRASTRUCTURE (AIG) App # 1</b>	2023	3,510,626		2,909,563			601,063	351,063		5,784,297	Partial Carry Over to later fiscal year or apply to Airport Terminal Modernization Program (Separate from NOFO) <a href="https://www.faa.gov/bill/airport-infrastructure">https://www.faa.gov/bill/airport-infrastructure</a>
23-01a	Airfield Lighting Vault Upgrade, Standby Generator and Regulators Replacement		1,650,000		1,485,000				165,000	165,000		Obsolete equipment that is hard to maintain and spare parts are not easily accessible.
23-01b	Terminal Concourses A Conveyance Equipment Rehabilitation		1,360,626		1,224,563				136,063	136,063		As calculated by LWC
23-01c	DAY Fire Alarm Syst Rehabilitation (40% to 60% Split)		500,000		200,000				300,000	50,000		This is an order-of-magnitude estimate depending on proration and defined scope-of-work. (system assessment is currently underway)
23-02	<b>AIRPORT INFRASTRUCTURE (AIG) App # 2</b>	2023	5,000,000		4,300,000			700,000	500,000		1,484,297	Partial Carry Over to later fiscal year or apply to Airport Terminal Modernization Program (Separate from NOFO) <a href="https://www.faa.gov/bill/airport-infrastructure">https://www.faa.gov/bill/airport-infrastructure</a>
23-02a	DAY Fire Pumps Replacement (40% to 60% Split)		400,000		160,000				240,000	40,000		This is an order-of-magnitude estimate depending on proration and defined scope-of-work. (system assessment is currently underway)
23-02b	Passenger Loading Bridge Replacement (including 400 HZ unit and PCAir). No Foundation (4 per year @\$1.15M each)		4,600,000		4,140,000				460,000	460,000		
24-01	Taxiway "L", "J" & "K" Reconfiguration (Center 2 Area) & Center 1 at TW "C" Improvements	2024	3,750,000	3,375,000					375,000	150,500		Safety Issues per Part 139 Inspector
24-02	Rehabilitate Taxiway "W" Phase 1/3 (Edge Lights/related circuitry and regulators, Marking, TW W Shoulders)	2024	1,120,000	1,008,000					112,000	112,000		2020 Pavement Mgmt. Study (2021PCI<60) and to bring up to compliance
24-03	DAY RW 6R/24L Signage and Marking (Placeholder to address ADO concerns about declared distances)	2024	650,000	585,000					65,000	65,000	2,632,000	Master Plan
24-04	<b>AIRPORT INFRASTRUCTURE (AIG)</b>	2024	4,031,149		3,628,034			403,115	395,000		1,529,232	Partial Carry Over to later fiscal year or apply to other projects. FAA Funding increased by the 6.8% forecast. <a href="https://www.faa.gov/bill/airport-infrastructure">https://www.faa.gov/bill/airport-infrastructure</a>
24-04a	Passenger Loading Bridge Replacement (including 400 HZ unit and PCAir). No Foundation (3 @\$1.15m)		3,450,000		3,105,000				345,000	345,000		
24-04b	Airfield Guidance Signs and Pavement Markings - Construction		581,149		523,034				58,115	50,000		
24-05	DAY ATMP - Phase IV - Concourse B Modernization, including Conveyance Equip.	2024	9,130,780		5,231,060				3,899,720	613,285		<a href="https://www.faa.gov/bill/airport-terminals">https://www.faa.gov/bill/airport-terminals</a>
24-06	DAY Terminal Drive Concrete Pavement Rehabilitation	2024	1,500,000		1,350,000				150,000	150,000		
24-07	DAY Terminal Drive Asphalt Pavement Rehabilitation	2024	1,020,000		918,000				102,000	102,000		
25-01	Pavement Management Study	2025	175,000	157,500			0		17,500	17,500		Planning Study -Update Conditions
25-02	Reconstruct/Realign TW "A" and Remove TW "D" North, "A" and "B"	2025	9,000,000	3,642,500			5,357,500		900,000	900,000		Master Plan Realignment
25-03	<b>AIRPORT INFRASTRUCTURE (AIG)</b>	2025	5,400,000		4,860,000			540,000	130,000		359,387	Partial Carry Over to later fiscal year or apply to other projects. FAA Funding increased by the 6.8% forecast. <a href="https://www.faa.gov/bill/airport-infrastructure">https://www.faa.gov/bill/airport-infrastructure</a>
25-03a	Passenger Loading Bridge Replacement (including 400 HZ unit and PCAir). No Foundation (4 @\$1.35m)		5,400,000		4,860,000				540,000	130,000		
25-04	DAY ATMP - PHASE III - Concourse Access Enhancements/Connectors	2025	31,098,429		25,180,699				5,917,730	2,400,540		
26-01	Taxiways "R" Reconstruction & Associated Connector ("S", "T", "U", "M")	2026	4,222,222	3,800,000					422,222	422,222		2020 Pavement Mgmt. Study (2025 PCI=POOR)
26-02	<b>AIRPORT INFRASTRUCTURE (AIG)</b>	2026	3,900,000		3,510,000			390,000	135,000		865,530	Partial Carry Over to later fiscal year or apply to other projects. FAA Funding increased by the 6.8% forecast. <a href="https://www.faa.gov/bill/airport-infrastructure">https://www.faa.gov/bill/airport-infrastructure</a>
26-02a	Passenger Loading Bridge Replacement (including 400 HZ unit and PCAir). No Foundation (3 @\$1.4m)		3,900,000		3,510,000				390,000	135,000		
26-03	DAY ATMP - Phase IV - Concourse A Modernization	2026	12,715,352		8,592,026				4,123,326	1,004,233		

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Associated City: Dayton				2023 Airport Infrastructure Grant= \$ 4,300,000.00				YAE		Checked By:			
Sponsor: City of Dayton				2024 Airport Infrastructure Grant= \$ 3,672,969.18				937/623-1340		Date Printed: 2/27/2023			
				2025 Airport Infrastructure Grant= \$ 3,690,154.91						Date Submitted: 12/20/2022			
				2026 Airport Infrastructure Grant= \$ 4,016,143.65									
Airport Three Letter ID: DAY		Congressional District: 10th of Ohio, City of Dayton		2021-2041 Forecast =									
Item #	Description	Fiscal Year	Total Cost	FAA Entitlement	Federal Funds		FAA Discretionary	State Non-FAA	Local		FAA Carryover Funds		
					ATP (Airport Terminal Program) Discretionary	AIG (Airport Infrastructure Grant) Formula Based			Match	Contingency			
				90%	90%				10%				
27-01	Terminal Apron Reconstruction Phase 5 of 7 (Central Apron-West) and Existing Connector Demolition	2027	4,222,222	3,800,000			0		422,222	422,222	0		Reconfiguration of the Terminal Apron as a result of the ATMP
28-01	Reconstruct/Realign TW "C" and Remove Existing TW "C"	2028	12,000,000	3,800,000			8,200,000		1,200,000	1,200,000			Master Plan Realignment
29-01	Terminal Apron Reconstruction Phase 6 of 7 (North Apron@Deice Pad2)	2029	4,222,222	3,800,000					422,222	422,222			2020 Pavement Mgmt. Study (2025PCI=21)
30-01	Terminal Apron Reconstruction Phase 7 of 7 (Southeast Corner)	2030	4,222,222	3,800,000					422,222	422,222			2020 Pavement Management Study(2018PCI=79) - w/Projected PCI =50 by 2028
31-01	Reconstruct/Realign TW "H"	2031	4,222,222	3,800,000					422,222	422,222			Master Plan Realignment
32-01	Taxiway "U" Relocation	2032	7,510,976	3,800,000			2,959,878		751,098	751,098			Master Plan
			117,973,422	31,140,500	41,271,785	14,907,598	11,159,878	0	20,693,662	9,623,329			