

Strategic Development Committee

Air Service Development Information Report

May 2014

New Service at Reagan National

jetBlue
AIRWAYS®

New Daily Flights Beginning June 19

(6 of 12 new slot pairs)

- 2x – Charleston, SC
- 2x – Hartford, CT
- 1x – Nassau, Bahamas
- 1x – Tampa, FL

New Daily Flights Beginning August 10:

- 6x – Chicago Midway, IL
- 3x – Nashville, TN
- 2x – New Orleans, LA

(16 of 27 new slot pairs)

New Daily Flights Beginning September 30:

- 3x more – Chicago, Midway, IL (total = 9x)
- 2x – Tampa, FL



New Daily Flights Beginning November 2 (exact schedules not yet announced):

- Akron-Canton (new)
- Dallas Love Field (new)
- Indianapolis (new)
- Houston Hobby (more flights)
- St. Louis (more flights)



New Daily Flights Beginning October 13

(4 of 4 new slot pairs)

4x – Dallas Love Field, TX

Divested Service at Reagan National

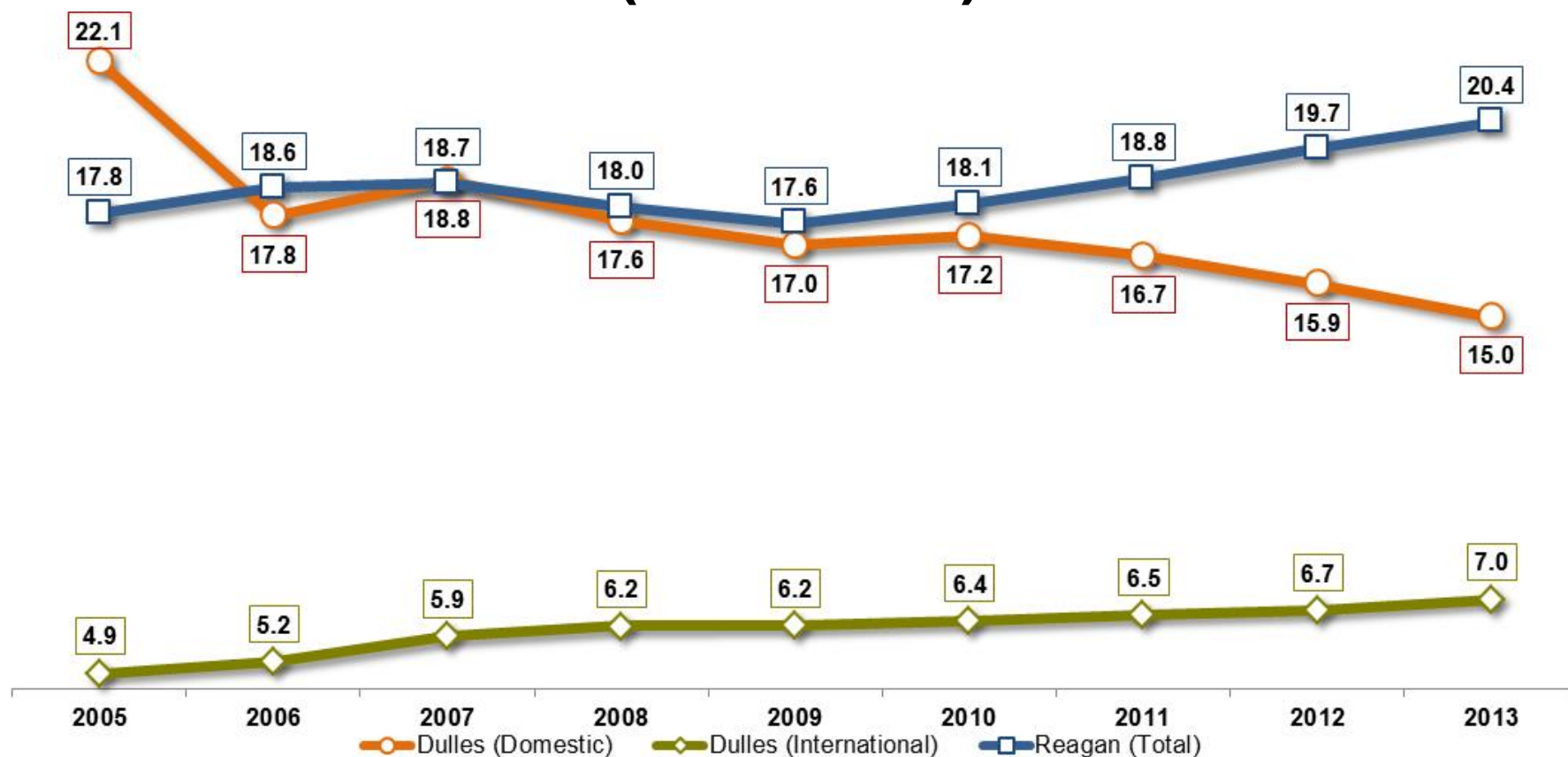
To meet DOJ divestiture requirements, American Airlines has announced elimination of DCA service to the following markets:

- Augusta, GA (1)
- Detroit (5)
- Fayetteville, NC (1)
- Fort Walton Beach (1)
- Ft. Myers reduced to seasonal
- Islip (2)
- Jacksonville, NC (1)
- Little Rock (1)
- Minneapolis (3)
- Montreal (2)
- Myrtle Beach (2wkly)
- Omaha (1)
- Nassau (2wkly)
- Pensacola (1)
- San Diego (→ LAX)
- Savannah (2)
- Tallahassee (1)
- Wilmington, NC (2)

Red markets represent complete DCA service elimination.

Additional American service reductions expected in other served markets.

Passenger Activity (In Millions)



The American merger has the potential to further grow passengers annually at Reagan National by 2 million – drawing from both Dulles and BWI

Dulles Domestic Air Service Changes



Summer/Fall Reductions – (2 markets eliminated)

- Oakland – June 15 – 1x
- Long Beach – Sept 1 – 1x
- No change to Boston and JFK markets – 5x



November 2nd Schedule Changes – (no overall IAD flight reductions)

- Chicago Midway – reduction – 5x to 2x
- Denver – increase – 2x to 3x
- Las Vegas – new – 1x
- San Diego – new – 1x



May/June Reductions – (3 markets eliminated)

- Binghamton – 2x
- Fort Lauderdale – 1x
- Miami – 2x

Additional Fall adjustments planned



Dulles Domestic Air Service News

FRONTIER



Frontier Airlines announced on May 13 it will begin ultra low-fare service to the following 14 domestic markets from Dulles. First flights begin August 19:

- | | |
|--------------------|------------------------|
| ✈ Atlanta | ✈ Las Vegas |
| ✈ Charlotte | ✈ Memphis |
| ✈ Chicago O'Hare | ✈ Minneapolis |
| ✈ Cincinnati | ✈ Orlando |
| ✈ Detroit | ✈ St. Augustine |
| ✈ Ft. Lauderdale | ✈ St. Louis |
| ✈ Ft. Myers | ✈ Tampa |

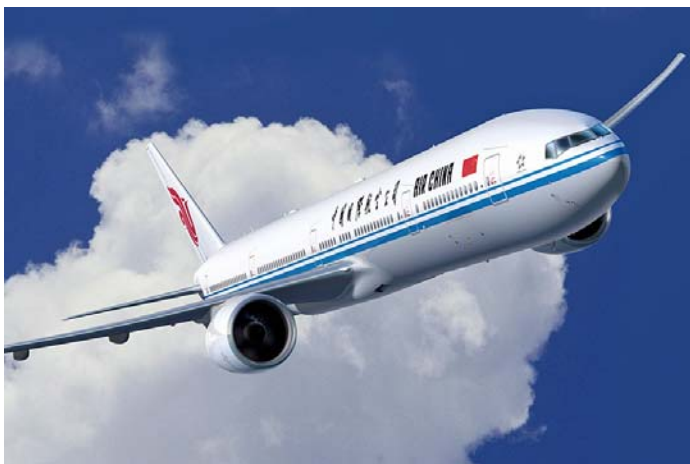
Green markets represent new markets added at IAD.

New International Service at Dulles



UNITED

- ✈ **Daily Service to Madrid, Spain – June 4—September 6**
- ✈ **Saturday/Sunday Service to Nassau, Bahamas – June 7—August 17**



AIR CHINA

- ✈ **4 Flights per Week – Dulles/Beijing – starts June 10**

Conclusion

- ➔ New service announced for Reagan National will add increased flights in 12 markets with additional service announcements anticipated this Summer.
- ➔ Modest domestic service reductions are occurring at Dulles as Reagan National services are added.
- ➔ New domestic service at Dulles by Frontier Airlines will add 14 new domestic low fare markets starting this August.
- ➔ International service at Dulles will grow by one new airline and two additional markets in the coming months.
- ➔ All recent air service developments are combining to stimulate growth at both Airports.



Ronald Reagan Washington National Airport



Dulles Corridor Metrorail Project



Dulles Toll Road



Washington Dulles International Airport



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