

John Glenn Columbus International Airport (CMH)

Terminal Project and Air Service Updates

November 2023



CMH Terminal Today



Aging facility, opened in 1958

- Multiple assets and systems are nearing the end of useful life
- Operationally and environmentally inefficient
- Limits air service growth



Design and Development – Project Team



Gensler

#1 Architecture Firm by
Architectural Record



MOODY•NOLAN

2021 AIA Architecture
Firm Award

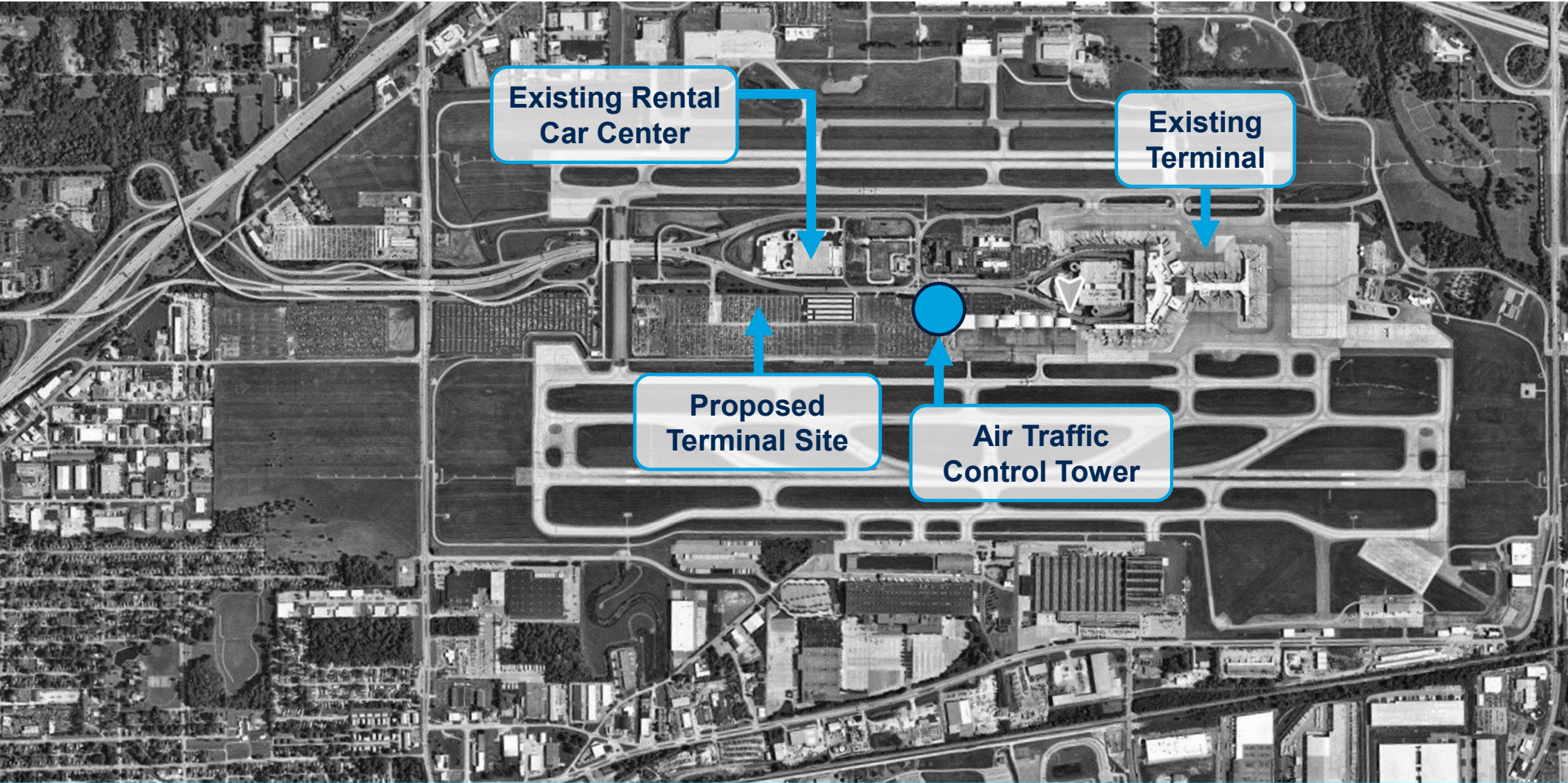


HENSEL PHELPS

Plan. Build. Manage.

#1 Largest U.S. airport terminal contractor
and construction management firm by
Building Design+Construction

- Global architecture, design and planning firm **Gensler**, along with Columbus-based **Moody Nolan** are providing professional design services for a new terminal.
- **Hensel Phelps Construction Co.**, a nationally recognized leader in aviation construction, partnered with local firm **Elford** is serving as Construction Manager at Risk (CMR).





What is guiding
the new terminal
design?

**THE
PASSENGER**



Terminal of the future

Greater capacity

- 13 million annual passengers
- 51% increase

Space for future growth if needed

- Lane to the east

Designed for efficiency

- Y design brings aircraft closer to the checkpoint
- Reduces walking distances for passengers

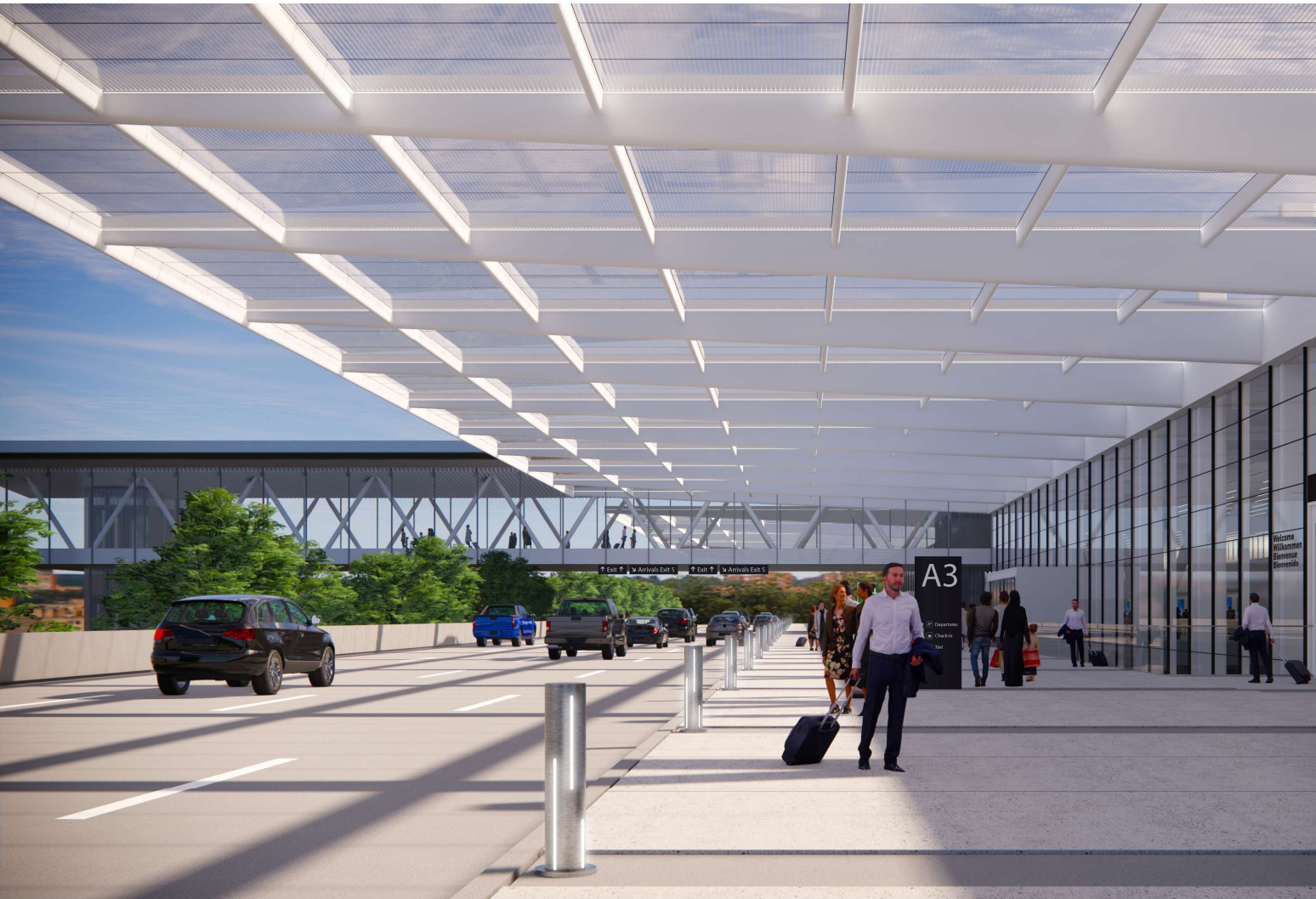


Prepared for our region's growth

36 hyper-efficient gates

- Gain from today's 29 constrained gates

Customs facilities expanded



Efficient, safe and sustainable

Pedestrian bridge

- Ease of access to all ground transportation options

LEED certification



Elevated experience

Single checkpoint

- More concession and retail offerings
- Greater lounge access

Line of sight

- More relaxed experience when you can see your gate



Convenience, comfort and style

Right-sized hold rooms

- 40-60% larger than current hold room seating areas

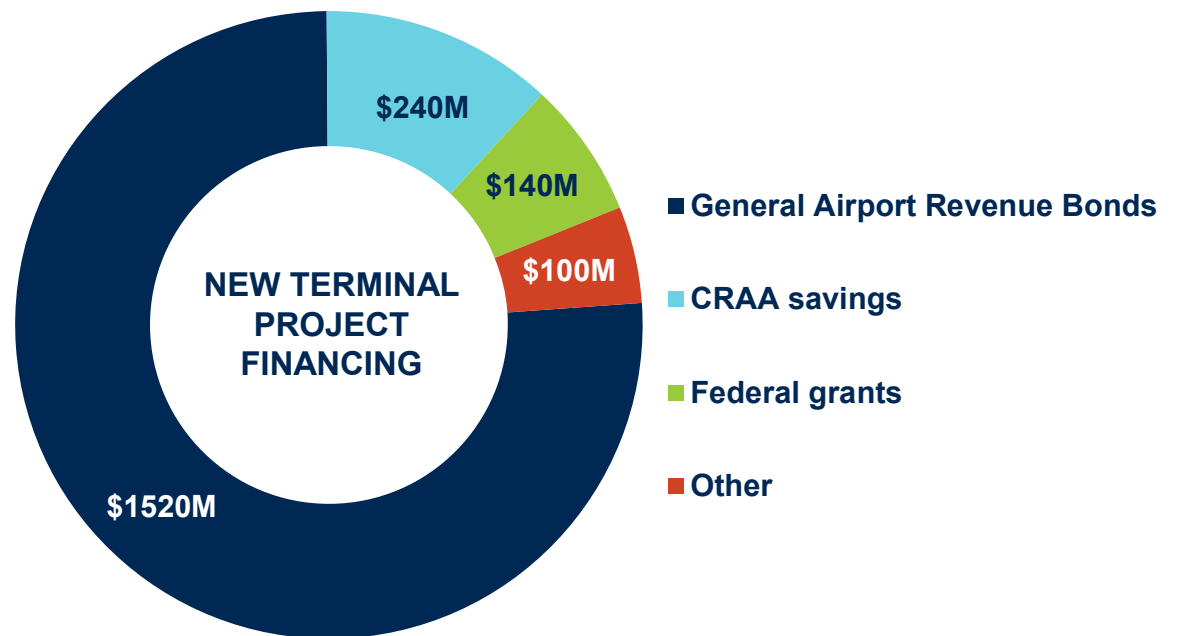
Project Funding Sources



Total project cost estimated at \$2 billion

Where will the funding come from?
CMH airport is a self-sustaining entity.

CRAA does not levy taxes.



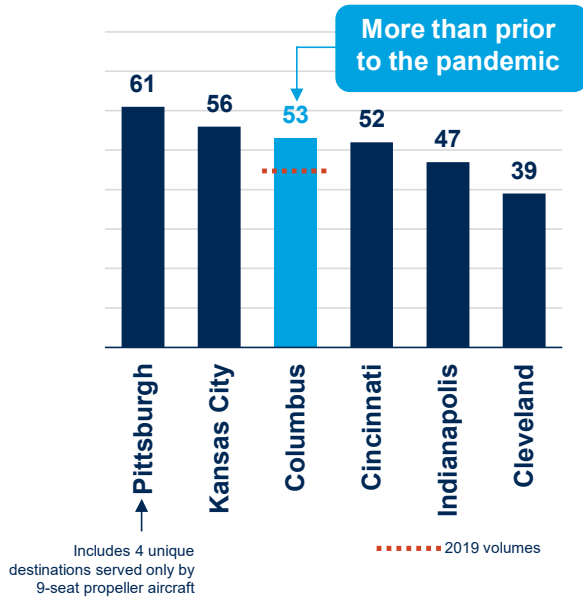
Air Service Update

Air Service Recovery Continues To Be Strong

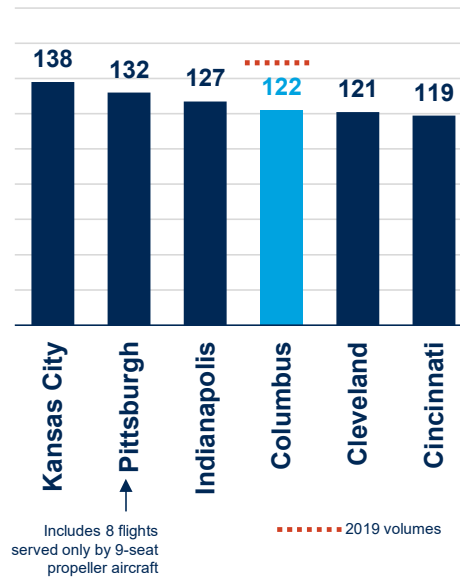


YTD passenger traffic 97% of 2019's levels

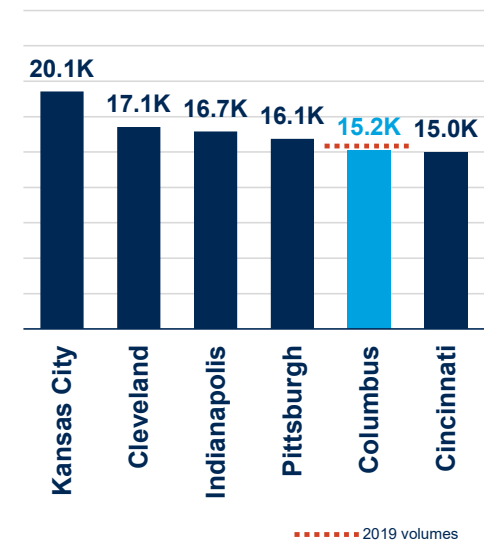
Nonstop destinations served



Avg. daily departing flights (2023)



Avg. daily departing airline seats (2023)



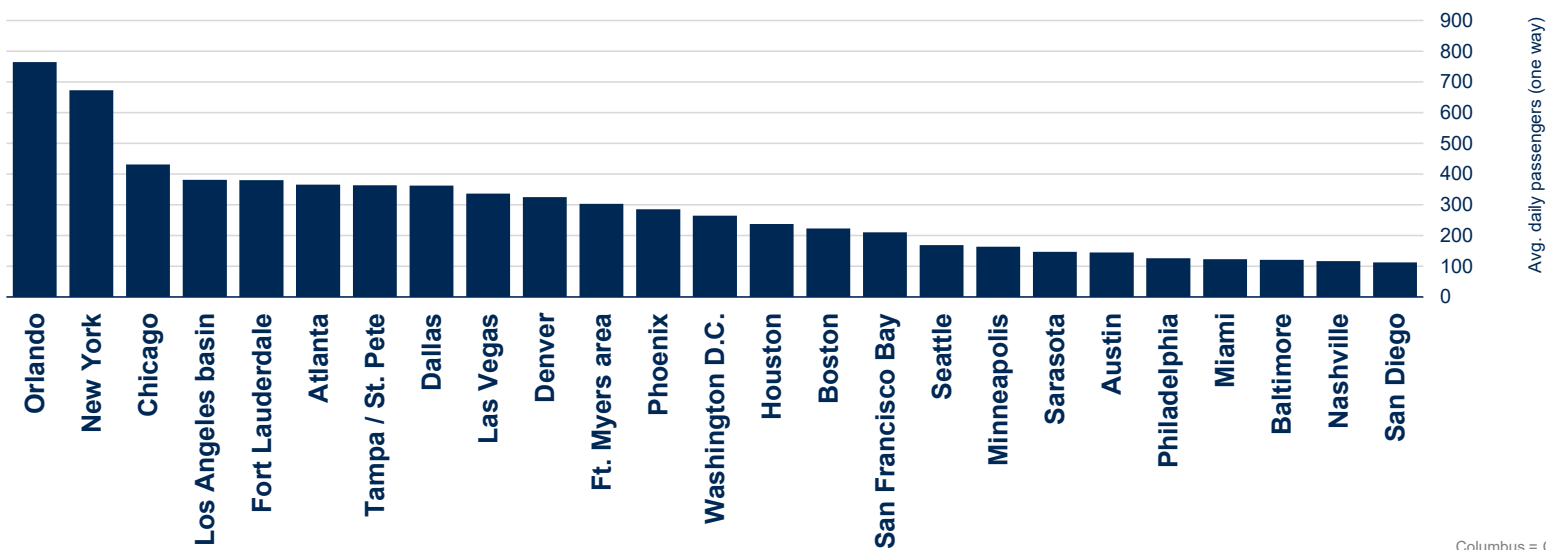
Nonstop destinations includes announced service
Source: flight Schedules via Dlio Mi; Columbus = CMH+LCK

Top Destinations Columbus Passengers Travel to the Most



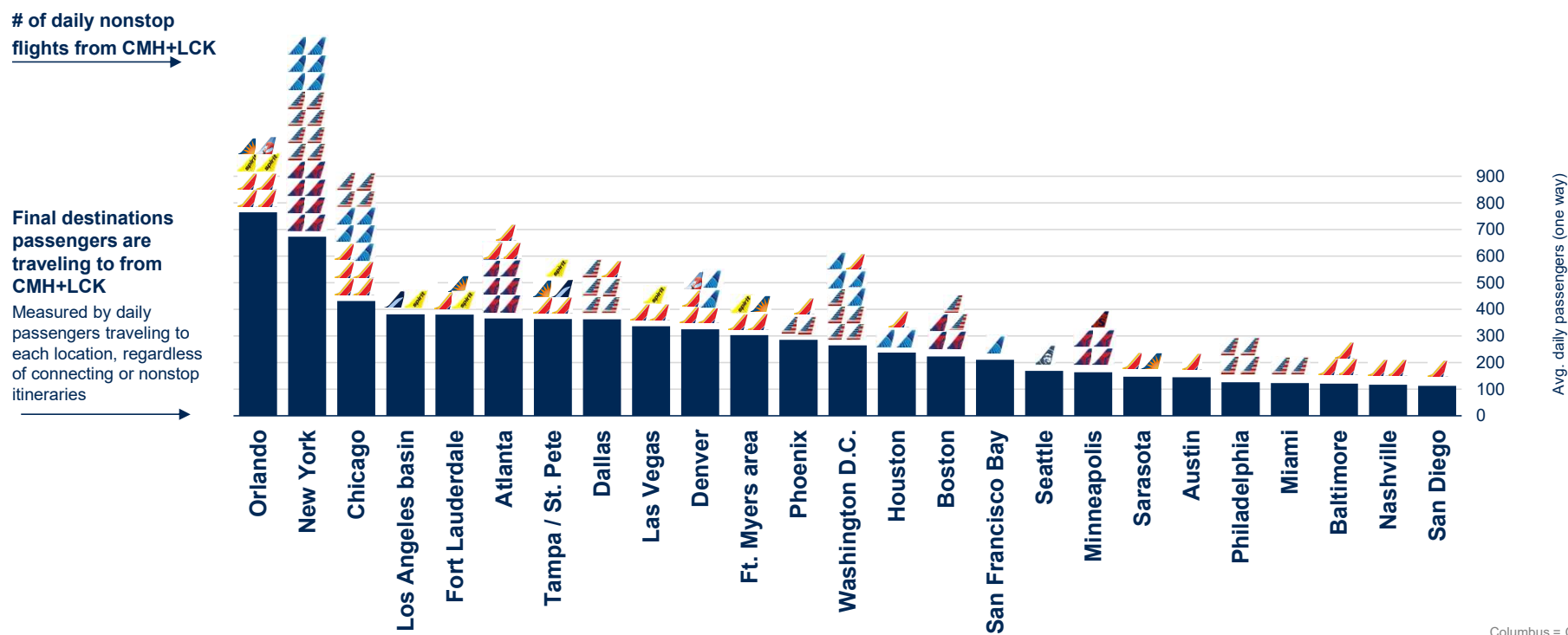
Final destinations passengers are traveling to from CMH+LCK

Measured by daily passengers traveling to each location, regardless of connecting or nonstop itineraries



Source: US DOT (YE 2Q 2023) and Flight Schedules (2023 + announced) via Diio Mi
Columbus = CMH+LCK

Columbus is Well Served to These In-Demand Destinations

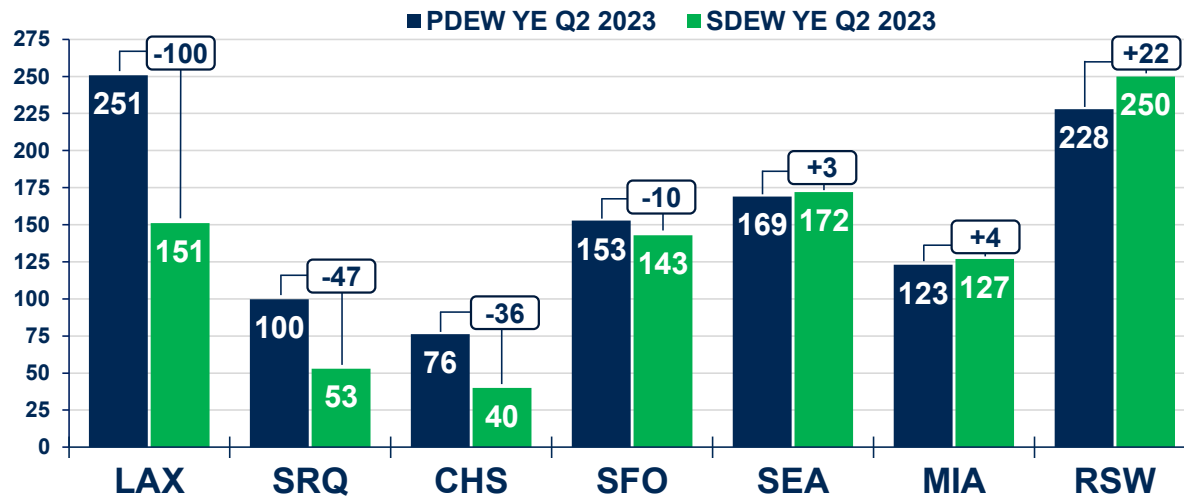


Columbus = CMH+LCK
Source: US DOT (YE 2Q 2023) and Flight Schedules (2023 + announced) via Diio Mi

Largest underserved domestic O&D markets from Columbus

CMH underserved domestic destinations

O&D destinations ≥ 75 PDEW



Continental U.S. only
Source: Diio US DOT YE 2Q 2023 & Schedules YE 2Q 2023 via Cirium

Target Markets: Domestic



LARGEST UNSERVED MARKETS



112
avg. daily
passengers

78
avg. daily
passengers

71
avg. daily
passengers

62
avg. daily
passengers

61
avg. daily
passengers



Only service is on an
ultra low-cost carrier

Previously served
on American & Delta

Source: YE 2Q 2023 US DOT data via Diio Mi

Target Markets: Europe



2019 daily passengers from CMH to Europe	
London	41
Paris	18
Amsterdam	15
Rome	15
Frankfurt	13
Dublin	12
Barcelona	9
Munich	7
Madrid	7
Zurich	6
Athens	6
Other	99
Total	248

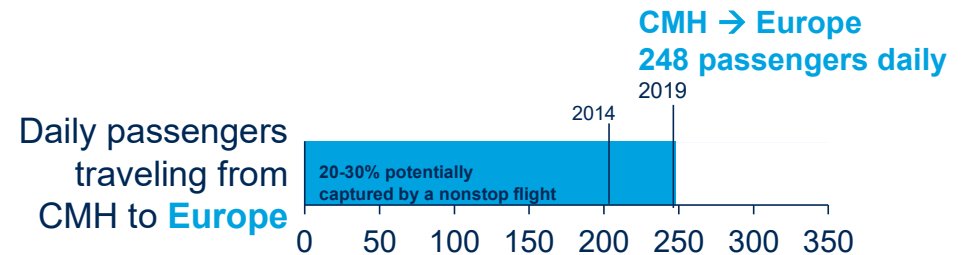
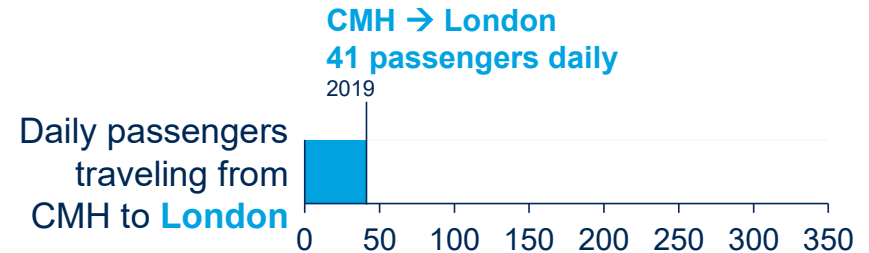
Potential aircraft types



BOEING 787-800
214 seats

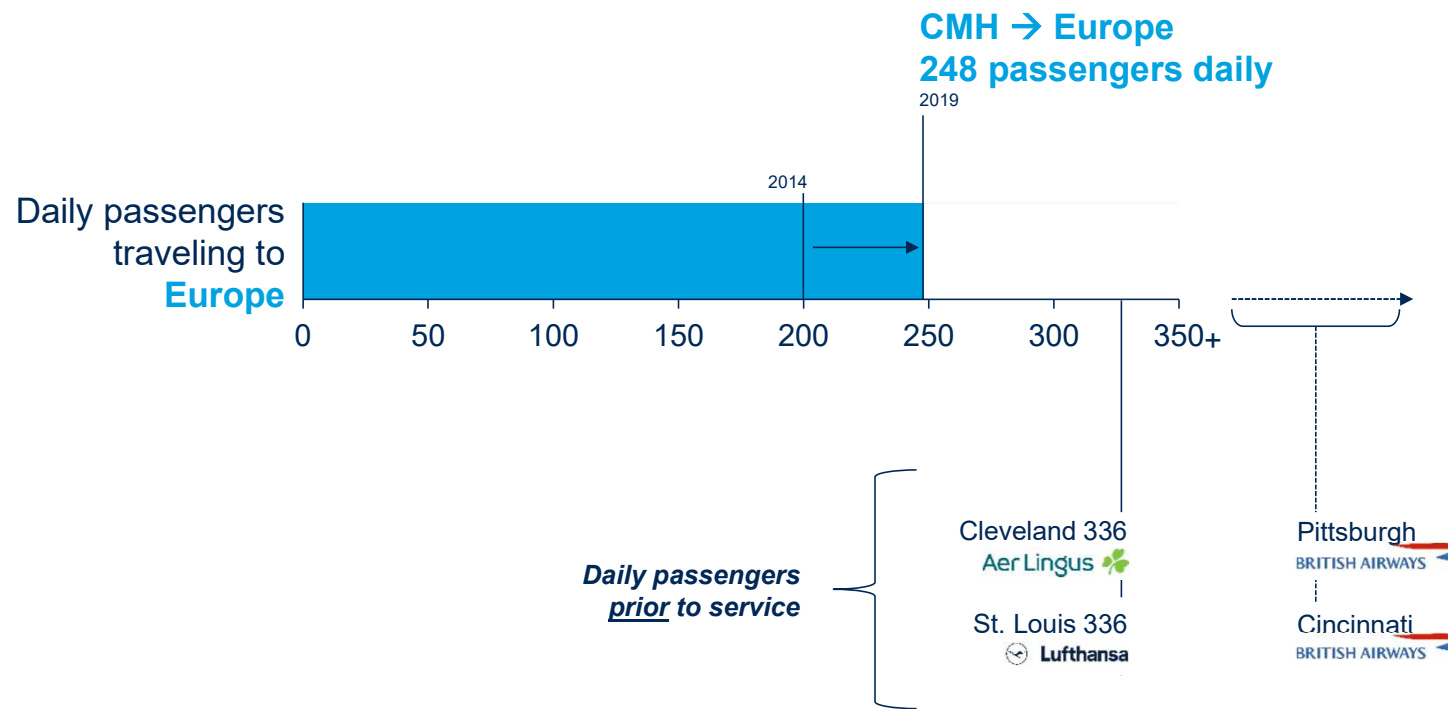


AIRBUS A321 NEO
184 seats



Not shown: incremental connection potential to the Middle East, Africa & India
Source: FM ARC traffic via Dio Mi

Peer Market Comparison: Europe



Source: FM ARC traffic via Diio Mi

Target Market: Asia

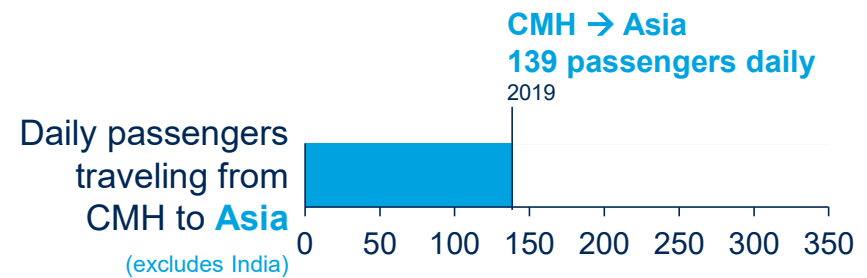
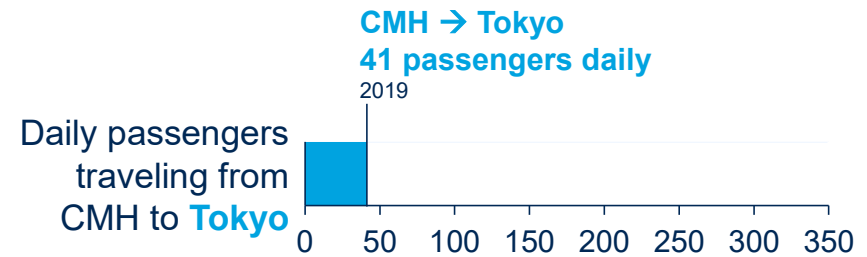


2019 daily passengers from CMH to Asia (excluding India)	
Tokyo	41
Shanghai	15
Beijing	13
Seoul	9
Hong Kong	8
Manila	4
Taipei	4
Other	45
Total	139

Potential aircraft types



BOEING 787-800
184 seats



India excluded due to length of travel (long routing through Tokyo)
Source: FM ARC traffic via Diao Mi

Thank you!