

Goal: Serve Communities and Support the Economy

Expand Transportation Options To Allow Maryland's Diverse Communities To Access Opportunities and To Support the Movement of Goods

Key Outcomes: Six objectives and 19 performance measures will support the goal to serve communities and support the economy. By expanding transportation options to allow Maryland's diverse communities to access opportunities and to support the movement of goods, we will work to expand transit and active transportation use and bolster the regional economy.

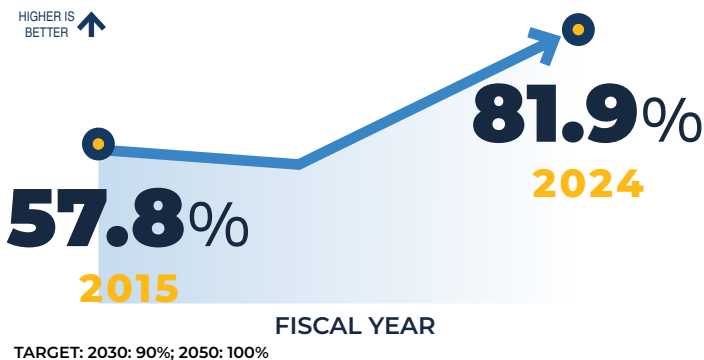
Maryland's population continues to grow steadily, increasing more than 1.5% from 6.08 million in 2020 to 6.18 million in 2023, according to the latest American Community Survey (ACS) one-year estimate. By 2050, Maryland's population is expected to reach above seven million, a more than 13% increase from 2023. The rise in population is likely to increase Vehicle Miles Traveled (VMT). Thus, Maryland is investing strategically in equitable multimodal transportation projects to improve connectivity, reliability, safety and access to opportunities for the State's growing communities. Maryland's multimodal options are growing

with the construction of the Purple Line, a 16-mile light rail corridor, the Red Line, a 14-mile east-west transit line and the Commuter Choice Maryland program, which promotes alternatives to driving.

Maryland's nationally significant multimodal network relies on highways, railroads, airports, ports and pipelines. Maryland serves as a crossroad of freight activity for the entire Eastern Seaboard. The large regional rail network also supports passenger rail trips both within and out of Maryland on MARC, Amtrak and other transit systems. To increase the accessibility of the transit system and improve access to work, housing, and other activities, MDOT is investing in Transit-Oriented Development (TOD). TOD will not only create better transportation choices, but also support environmental protection by promoting active transportation, reducing the demand of personal vehicles and bringing down greenhouse gas (GHG) emissions.

Objective: Enhance Marylanders' Satisfaction With the Transportation System and MDOT Services

PERCENTAGE OF MVA CUSTOMERS WITH A WAIT TIME UNDER 10 MINUTES



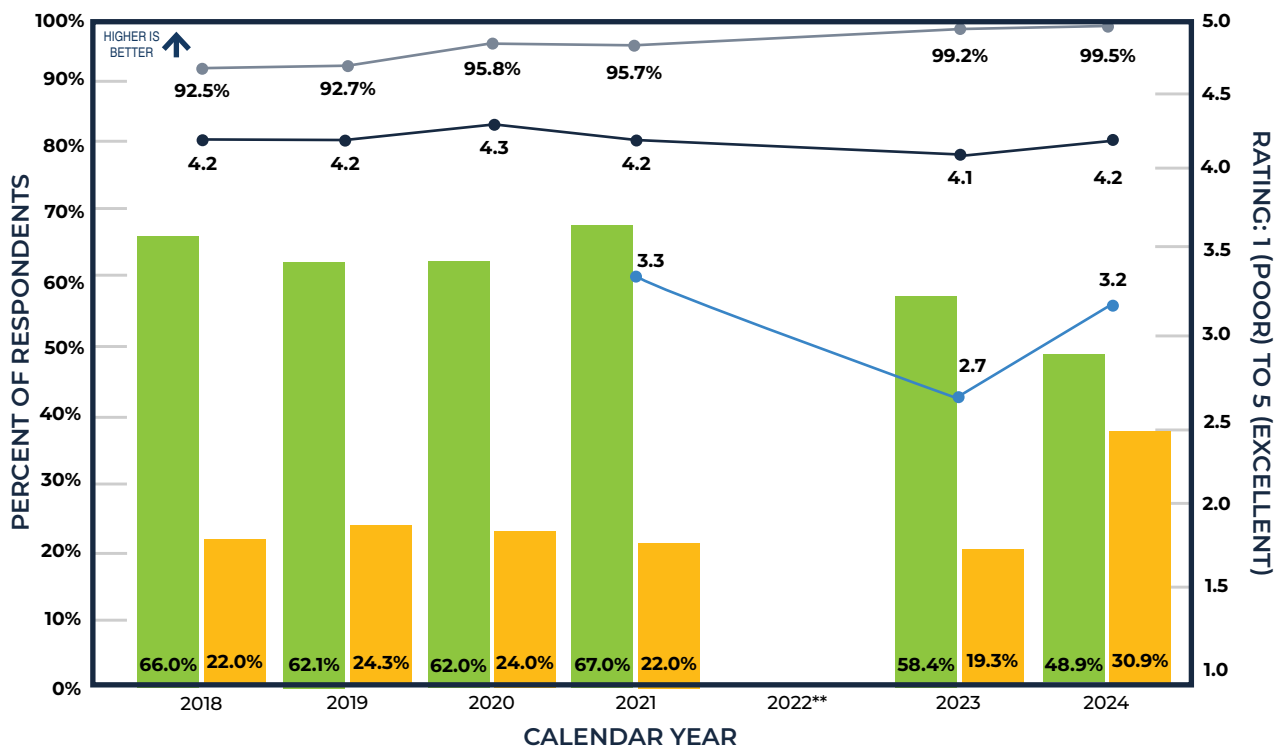
What Is the Trend?

- The percentage of MVA customers with a wait time under 10 minutes decreased from FY 2021 to FY 2022 but continued to increase between FY 2022 and FY 2024. In FY 2024, more than three out of four customers experienced a wait time of 10 minutes or less.
- As of September 2024, up to 80% of MVA business is now done outside of physical in-office interactions, largely due to the success of the myMVA online system where Marylanders can do tasks, such as schedule appointments, renew a license, renew registration and find information on vehicle emissions testing.

What Are Future Strategies?

- MVA is focused on providing premier customer service by ensuring that all customers are having a satisfactory experience, regardless of office and service type. They have adjusted their approach to look at the percentage of customers with lower wait times to ensure the majority of customers are receiving quick, quality service and address any outlying issues as quickly as possible.

OVERALL SATISFACTION WITH MDOT



- MDOT-Wide customer satisfaction rating: satisfied (UM survey)
- MDOT-Wide customer satisfaction rating: very satisfied (UM survey)
- MVA customer satisfaction
- MTA customer satisfaction***
- MAA customer satisfaction****

TARGETS: OVERALL INCREASE

* Overall satisfaction with MDOT is measured via a University of Maryland survey, which was updated in 2023. MAA, MVA and MTA conduct their own customer satisfaction surveys.

** 2022 was a gap year for collecting this MDOT survey data, so 2022 is not included in this chart.

*** MAA and MTA data is on a scale from 1 (poor) to 5 (excellent).

**** MAA data are Q4 results, except for 2024 (Q2).

What Is the Trend?

- While overall satisfaction with MDOT has been relatively consistent since CY 2017, the highest percentage of MDOT customers (30.9%) reported that they were “very satisfied” with MDOT in CY 2024.
- The percentage of MVA Branch Office Customers rated service as “Good” or “Very Good” has increased since CY 2020, with a record high rating of 99.5% in CY 2024.
- MTA’s customer satisfaction rating, which is on an increasing scale from 1 to 5, increased from 2.7 in CY 2023 to 3.2 in CY 2024, marking a return close to pre-pandemic levels.
- BWI Marshall Airport is experiencing record-setting domestic and international activity levels. While the strong growth in travel demand continues to stress the airport systems, BWI Marshall Airport’s “Overall Satisfaction” score continues to show a three-year uptrend. Passenger surveys in CY 2024 gave BWI Marshall Airport a high rank in multiple categories, including “Ease of Going through Security,” “Wait Times,” and “Courtesy of Airport Security Staff.”

What Are Future Strategies?

- MTA is focused on enhancing customer experience by improving real-time vehicle predictions, upgrading signals and signage around stations and launching a Customer Experience Office. One example of improving customer experience and efficiency is the new ability to transfer between MARC and Virginia Railway Express (VRE) trains for free.
- MVA announced the Maryland Mobile ID in Samsung Wallet in addition to Apple Wallet and Google Wallet. Additionally, several new laws went into effect in October CY 2024 to streamline and improve customer experience, including MVA’s abilities to print death certificates, extend the validity of learner’s permits and waive some State ID fees and the identification card fee for customers experiencing unique hardships.
- MAA is programming numerous physical and technology improvements to the terminal security screening, baggage handling, ticketing lobby and wayfinding systems during the next several years.

Objective: Apply Enhanced Technologies To Improve Communication and Relay Real-Time Information

Real-time information systems, installed throughout the transportation network and available via web interfaces and mobile devices, provide the most accurate information for customer trip planning and time management. Across the modes, MDOT strives to provide this to its customers. For example, Transit Royale is a premium version of the transit app that provides enhanced features for MTA customers, including access to upcoming departures, route maps and vehicle tracking for all transit lines. MTA also now provides real-time arrival information for Light Rail trains.



Objective: Prioritize the Transportation Needs of Underserved and Overburdened Communities In Project Selection and Scoping



ACCESS TO TRANSIT (WITHIN ½ MILE OF A TRANSIT STATION/STOP) BY PEOPLE WHO LIVE IN OVERBURDENED AND UNDERSERVED AREAS AS DEFINED BY THE CLIMATE SOLUTIONS NOW ACT (CSNA)

	CY 2024
Percentage of overburdened and underserved census tracts that have all or a portion of their boundary within the ½ mile buffer zone for the transit station/stops	100%

TARGET: 100%

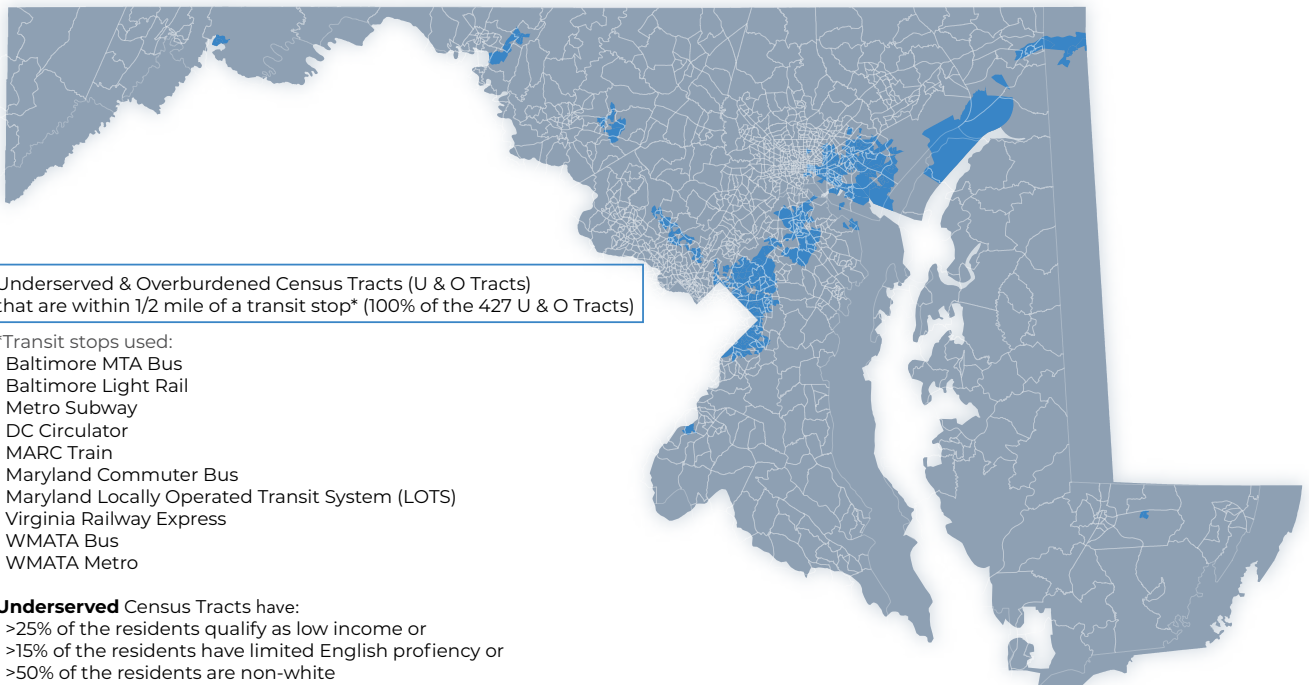
** This measure methodology has been updated since the previous report by including LOTS stops and measuring the percentage of U&O tracts instead of total people within them.*

What Is the Trend?

- No trend is available as this is the first year that MDOT is measuring and tracking transit station/stop access in overburdened and underserved communities with a new methodology. In CY 2024, 100% of overburdened and underserved census tracts have a transit stop within ½ mile.

What Are Future Strategies?

- MDOT's active, long-term projects, such as the Purple and Red Lines, will expand transit access in densely populated census tracts, many of which are designated overburdened and underserved.



Underserved Census Tracts have:

- >25% of the residents qualify as low income or
- >15% of the residents have limited English proficiency or
- >50% of the residents are non-white

AND

Overburdened Census Tracts have:

- Three or more of the 13 Environmental Health Indicators >75%

Data pulled September 2024 from US EPA:
<https://www.epa.gov/ejscreen/download-ejscreen-data>

RELATIVE PERCENTAGE OF CTP INVESTMENT THAT IS IN OVERBURDENED AND UNDERSERVED COMMUNITIES

This measure utilizes the 2022 CSNA's definitions of "overburdened and underserved communities." Overburdened communities are defined as any census tract for which three or more of 21 environmental health indicators are above the 75th percentile Statewide. Underserved communities are defined as any census tract where the most recent census survey shows:

- At least 25% of the residents qualify as low-income;
- At least 50% of the residents are non-white; or
- At least 15% of the residents have limited English proficiency.

In CY 2024, 29.2%, or 427 of the 1,460 census tracts in Maryland with population fit the definition of overburdened and underserved.

	FY 2023	FY 2024
Relative percentage of CTP investment that is in overburdened and underserved communities	31.4%	40.7%

TARGET: NONE

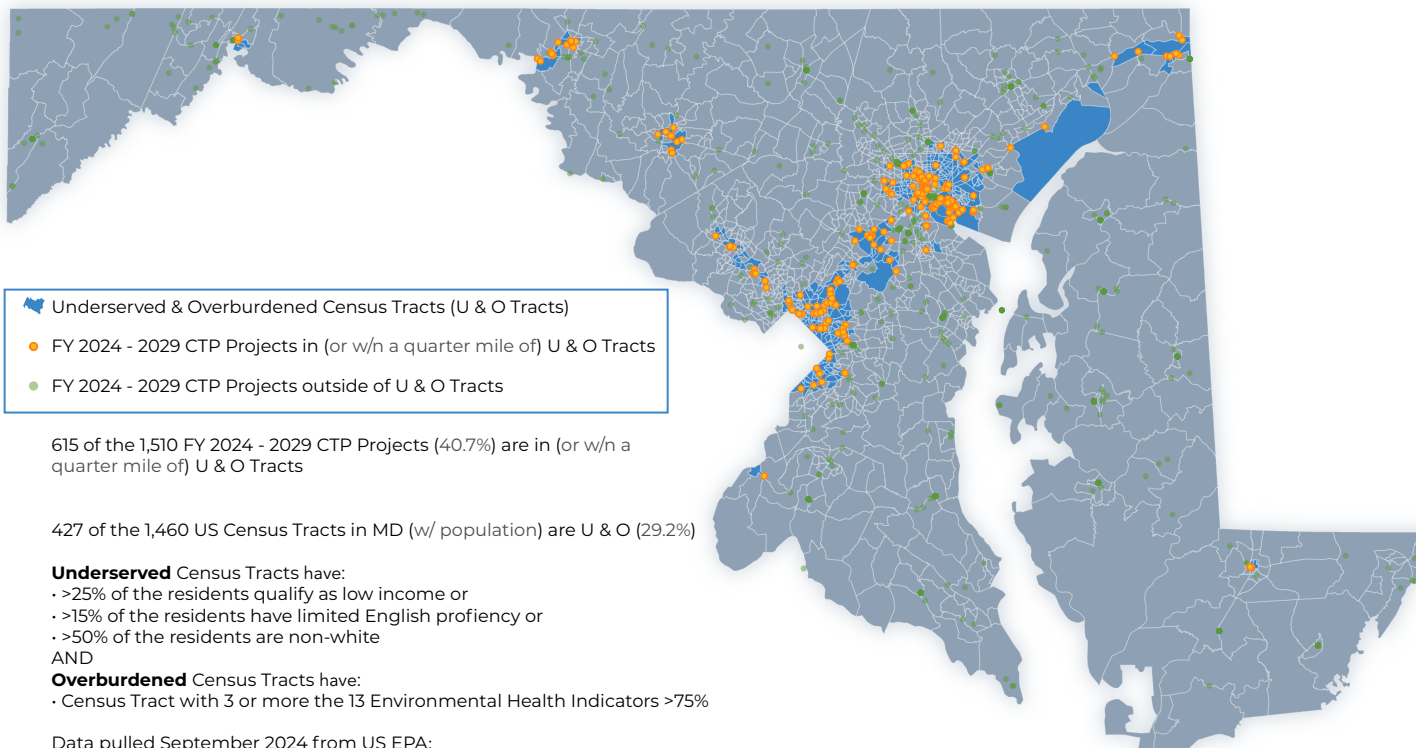
*The number of Maryland census tracts included dropped from 1,465 from last year's report to 1,460 in this report to only include tracts with population. Additionally, the U.S. Environmental Protection Agency (EPA) updated the environmental indicator data in 2024, changing which census tracts are now considered overburdened and underserved.

What Is the Trend?

- CTP investment in overburdened and underserved communities increased from 31.4% in FY 2023 to 40.7% in FY 2024, meaning more than one-third of FY 2024 - FY 2029 capital projects fall into these census tracts, or 615 of 1,510 CTP projects.

What Are Future Strategies?

- The Playbook includes equity as a guiding principle to ensure that no one is left behind. One of the listed strategies is to "identify opportunities to prioritize underserved and overburdened communities in project selection, scoping and design." Currently a new prioritization process for the CTP that focuses on equitable investment is under consideration.
- MTA's redevelopment of Baltimore's Penn Station, funded in part by the \$6 million federal grant from the USDOT 2022 Rebuilding American Infrastructure with Sustainability and Equity (RAISE) program, will expand access to the local disadvantaged community, more than 20% of which lacks access to a vehicle.
- West Baltimore's Mondawmin Transit Hub is being upgraded with the assistance of \$20 million in RAISE grant funding. The upgrades include state of good repair improvements, station upgrades, pedestrian and bicyclist access and safety and environmental sustainability.

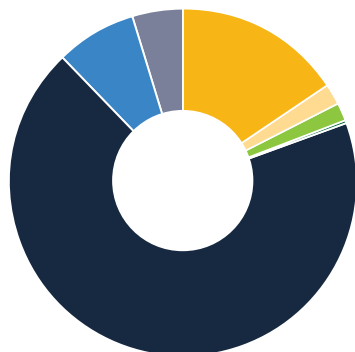


Data pulled September 2024 from US EPA:
<https://www.epa.gov/ejscreen/download-ejscreen-data>

Objective: Improve Quality of Life by Providing Active Transportation and Transit Access To Jobs and Opportunities



COMMUTE MODE SHARE (CY 2023*)



74.0%	Drive Alone
8.3%	Carpool
4.9%	Transit
16.9%	Work at Home
2.2%	Walk
1.8%	Other
0.3%	Bicycle

MODE	2015	2016	2017	2018	2019	2020	2021	2022*	2023
Drive Alone	73.7%	73.7%	73.8%	73.9%	73.9%	72.1%	69.8%	68.2%	74.0%
Carpool	9.4%	9.3%	9.1%	9.1%	8.9%	8.6%	8.2%	7.8%	8.3%
Transit	9.0%	8.9%	8.8%	8.6%	8.4%	7.4%	6.4%	5.5%	4.9%
Work at Home	4.2%	4.4%	4.5%	4.7%	5.0%	8.1%	11.9%	14.7%	16.9%
Walk	2.4%	2.4%	2.4%	2.3%	2.3%	2.1%	2.0%	0.3%	2.2%
Other**	1.0%	1.0%	1.0%	1.2%	1.2%	1.3%	1.5%	1.9%	1.8%
Bicycle	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%	0.3%	1.6%	0.3%

* ACS 5-year estimates (CY). 2023 uses ACS 1-year tables and should not be compared with other ACS data (5-year). All 2022 data has been updated from ACS one-year estimates in the last report.

** Other includes motorcycle, taxicab and "other" in the ACS data.

In response to the Key Bridge collapse, Commuter Choice Maryland has been working with local jurisdictions and regional partners to develop a robust set of TDM initiatives that aim to help employers and commuters find commuting solutions that reduce traffic congestion and travel time for people traveling to and around the Baltimore region. More information can be found on the website baltimorecommutes.org.The

What Is the Trend?

- Since the COVID-19 pandemic upended typical commute and travel patterns, this commute mode share data is providing insight into what changes are likely to continue and which are changing. The portion of Marylanders working at home continues to rise with a high of 16.9% in CY 2023, according to ACS one-year estimates. Transit mode share has seen a consistent decline since the COVID-19 pandemic from 7.4% in CY 2020 to 5.5% in CY 2022 and a projected decline to 4.9% in CY 2023 based on one-year estimates.

What Are Future Strategies?

- MDOT supports TDM through its Commuter Choice Maryland program and partnerships, including employers, to build commuter programs and take advantage of services including the free Guaranteed Ride Home service and ridematching, as well as incentives such as the Maryland Commuter Tax Credit and the incenTrip app. The free incenTrip app is expected to relaunch under a new brand, providing new options to incentivize commuting choices and employer-based commute programs.

MULTIMODAL MTA TRANSIT ACCESS TO ESSENTIAL SERVICES/DESTINATIONS*

CY	CY 2023	CY 2024
Multimodal MTA Transit Access to Essential Services/Destinations**	6.27%	6.30%

TARGET: NONE

* This measure's name has been updated since the last report to clarify the focus on multiple MTA modes.

** Essential Services/Destinations refers to healthcare-related services; food stores, banks and pantries; and Universities/Colleges.

What Is the Trend?

- Based on the two years of available data, the percentage of essential services and destinations that are served by at least two of MTA's modes slightly increased between CY 2023 and CY 2024.

What Are Future Strategies?

- MTA utilizes the newest Origin-Destination survey information to modify current system design to improve access to essential services/destinations.
- The MTA BMORE Bus plan provides new and modified routes serving new destinations and connections.

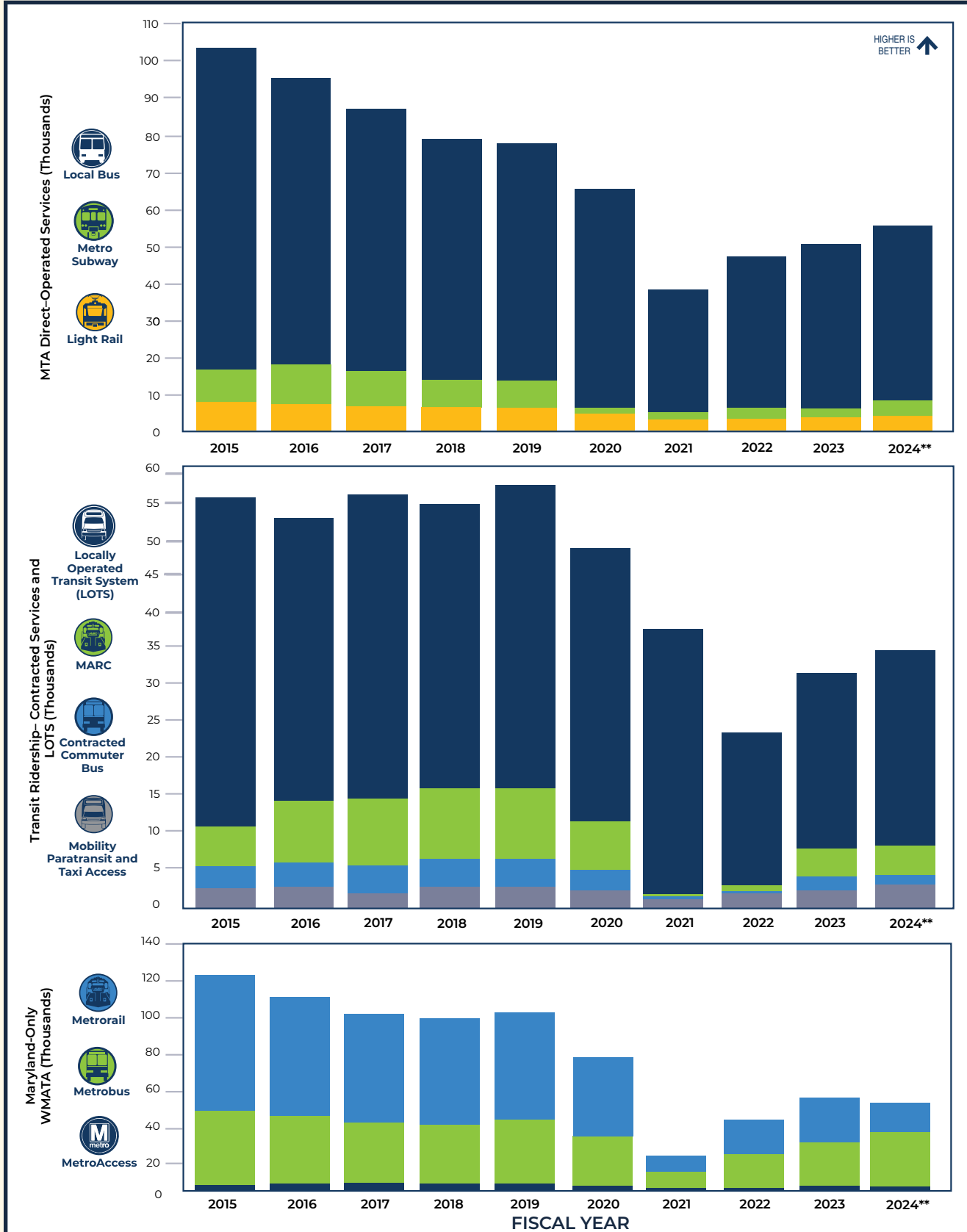
Objective: Increase Transit Use, Active Transportation, and Transit-Oriented Development (TOD)



GOAL

Serve Communities and Support the Economy: Expand Transportation Options To Allow Maryland's Diverse Communities To Access Opportunities and To Support the Movement of Goods

ANNUAL TRANSIT RIDERSHIP (THOUSANDS)



TARGET: OVERALL INCREASE

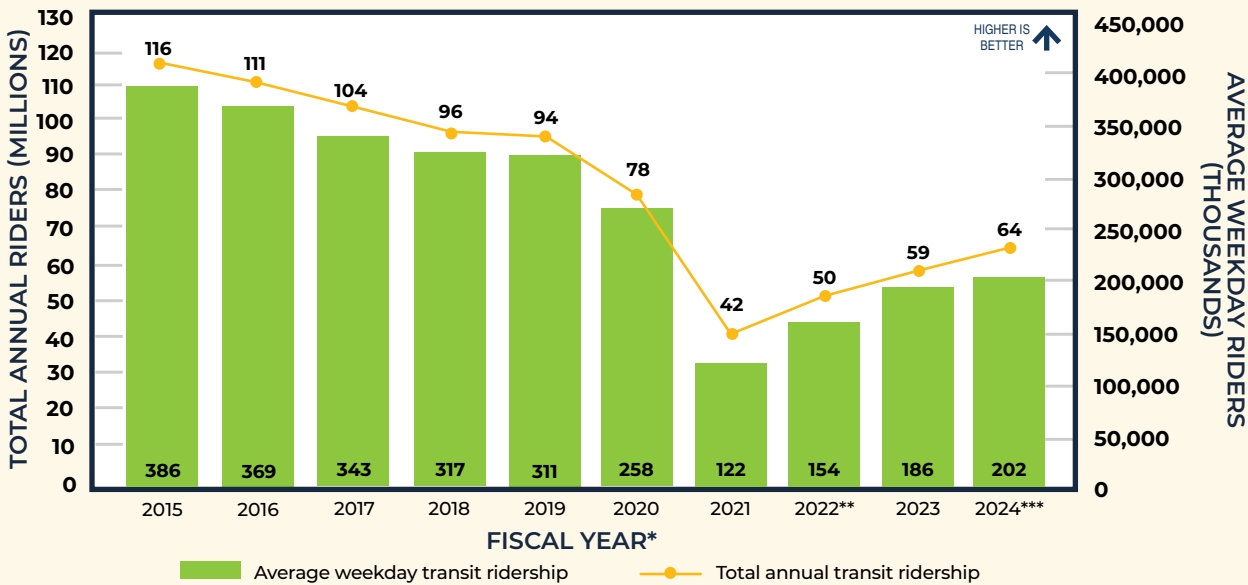
* Data have been revised from previous report.

** 2024 data is preliminary and subject to change.

*** This measure includes Metrorail, Metrobus and MetroAccess.

Note: Ridership is based on Unlinked Passenger Trips, which are the number of passengers who board public transportation vehicles. Passengers are counted each time they board vehicles no matter how many vehicles they use to travel from their origin to their destination.

MTA AVERAGE WEEKDAY TRANSIT RIDERSHIP



TARGET: OVERALL INCREASE

* To maintain the integrity of historical comparisons of bus ridership, MTA used ridership estimate differences between the new Automated Passenger Counter (APC) system and previous systems to adjust previous bus ridership estimates and allow for comparable data for fiscal years.

** FY 2022 total annual ridership has been revised from previous report.

*** FY 2024 data are preliminary and subject to change.

What Is the Trend?

- In FY 2024, MTA saw overall ridership improve across all modes and the trend is expected to continue in future years. MTA predicts increases in rider usage across all modes as pandemic-related impacts continue to abate. Increased ridership in the future will equilibrate this measure to be more consistent with pre-pandemic trends. In light of commuting patterns showing a decrease in transit commuters in the previous measure, this may point to transit being used more often for non-work trips. Additionally, the ACS commute mode share data is from FY 2023, which is older than the more up to date FY 2024 MTA ridership data.
- Out of the top 25 US transit agencies based on daily ridership between January and August, MTA had the largest year-over-year change (11.5%) between 2023 and 2024.
- Maryland-only WMATA ridership decreased steadily from 122.8 million in FY 2015 to a low of 26.2 million in FY 2021 due to the pandemic but has since seen a gradual recovery. However, FY 2024 ridership of 57.7 million shows a 2.1% decrease from FY 2023.
- The slower rate of recovery compared to the initial decline points and toward the transportation landscape that may have changed permanently due to shifts in work patterns and travel behavior.

What Are Future Strategies?

- In June 2023, Governor Moore announced the re-launch of the Red Line project, a proposed premium transit corridor between Woodlawn, downtown Baltimore and Bayview. Light Rail was selected to advance to a detailed environmental study and ultimately apply to enter the Federal Transit Administration (FTA) Capital Investments Grants program.
- MDOT, in partnership with the Maryland Economic Development Corporation, announced the Penn Line TOD Strategy Plan, which presents recommendations for the development of 170 acres of undeveloped State-owned land around Penn Line stations.
- MTA continues to advance construction on the Purple Line, a 16-mile light rail line from New Carrollton to Bethesda and is now more than 65% complete, and light rail vehicles have started to arrive in Maryland. The Purple Line will open in late 2027.
- MTA continues to add new routes strategically, such as the QuickLink 40, to boost service usage among riders. MTA continues to interface with its riders to understand better how they can develop service around their needs and demands.
- MTA's new BMORE Bus Plan aims to enhance the frequency of bus service and expand the routes while also providing on-demand microtransit and regional bus service.
- WMATA is implementing the Better Bus Network Redesign, in summer 2025 with a new regional bus network to better serve customer needs and regional goals.

POPULATION WITHIN ½ MILE OF A TRANSIT STATION/STOP
NUMBER OF JOBS WITHIN ½ MILE OF A TRANSIT STATION/STOP

CY	POPULATION WITHIN ½ MILE OF A TRANSIT STATION/STOP	JOBS WITHIN ½ MILE OF A TRANSIT STATION/STOP
2023	1,503,733	1,050,299
2024	1,498,634	1,035,462

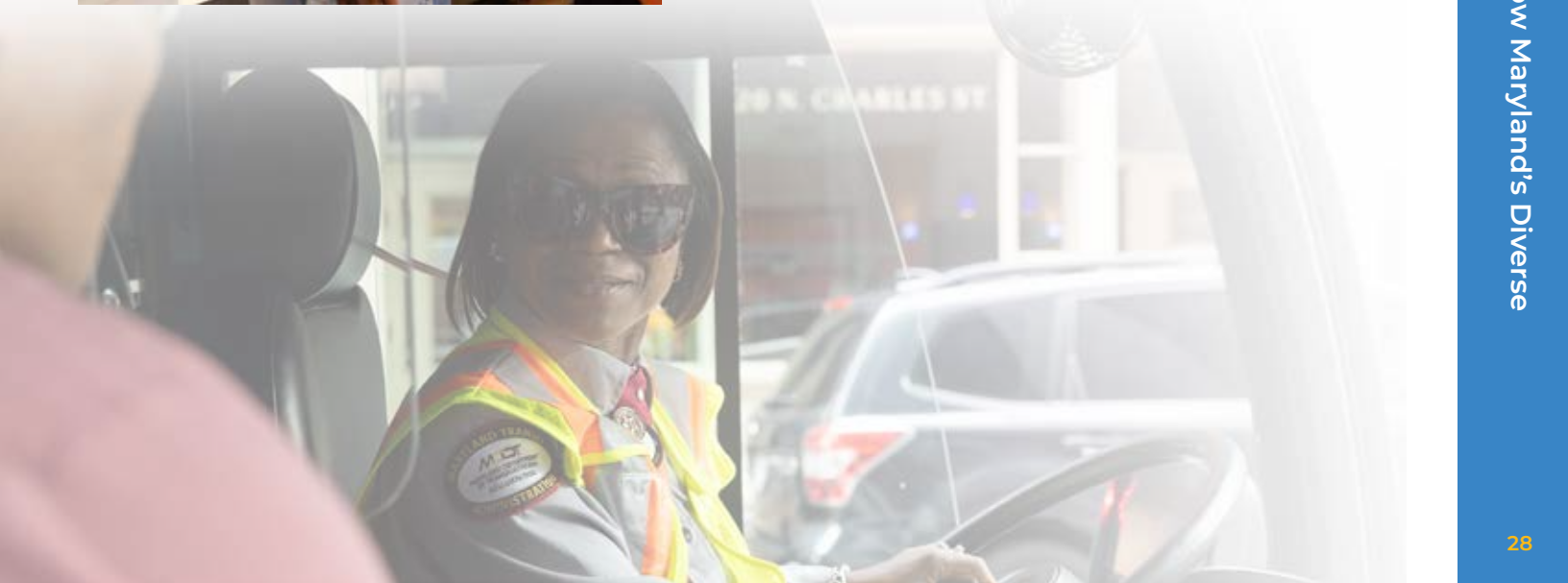
TARGET: NONE

What Is the Trend?

- Compared to CY 2023, there was a slight decrease in the total population and jobs within ½ mile of a transit station/stop. This could be due to the recent slight drop in Baltimore's population, which is the core service area of MTA. However, the percentage of the State population of 6.16 million within ½ mile of a transit stop stayed steady at 24% between CY 2023 and CY 2024.

What Are Future Strategies?

- MTA works with business organizations throughout their service area to provide transit access where commuter demand is high. MTA also conducts community outreach through rider surveys to determine where to place services.
- Implementing TOD is a key strategy to increasing accessibility to transit, housing, work and other activities. Metro Centre at Owings Mills is a TOD under development that has approximately 4,100 commuters board the Owings Mills Metro Stop each workday. Additionally, MDOT is developing a Master Plan for the 25-acres of unimproved land and surface parking lots surrounding Reisterstown Plaza Metro for a development of a TOD, which is being developed by Wabash Development Partners.
- MTA's new BMORE Bus Plan recommends new routes and additional stops to existing routes, to increase the number of jobs accessible to people via transit in central Maryland.
- Secretary Wiedefeld and Department of Housing and Community Development Secretary Jake Day signed a memorandum of understanding in October 2024 to advance Maryland's transit, economic development, housing and climate goals. The agreement will accelerate the construction of development of mixed-use and mixed-income housing within a half-mile of transit stations.



FIXED-ROUTE RIDERSHIP BY SENIORS AND PEOPLE WITH DISABILITIES*

FY	ANNUAL MTA RIDERSHIP OF SENIORS AND PEOPLE WITH DISABILITIES
2023	5,258,185
2024	4,733,088

TARGET: NONE

* MTA calculates this measure by utilizing their reduced fare passes for those with Mobility certification usage and calculate the proportion and extrapolate to ridership, thereby creating this ridership estimate. Additionally, disability fare is combined with senior fare, so these measures are combined. This measure includes both directly operated services as well as contracted services.

** FY 2023 data have been updated from the previous report, due to a methodology change and shifting from a projection to actual data.

What Is the Trend?

- In FY 2024, there were an estimated 4.7 million trips taken by seniors and people with disabilities on MTA's fixed-route transportation system, which was a slight decrease from FY 2023. However, while MTA strives to serve people with disabilities and seniors on fixed-route transit, this decrease may be due to the positive increase in Mobility, MTA's paratransit service for those with disabilities, reliability and usage.

What Are Future Strategies?

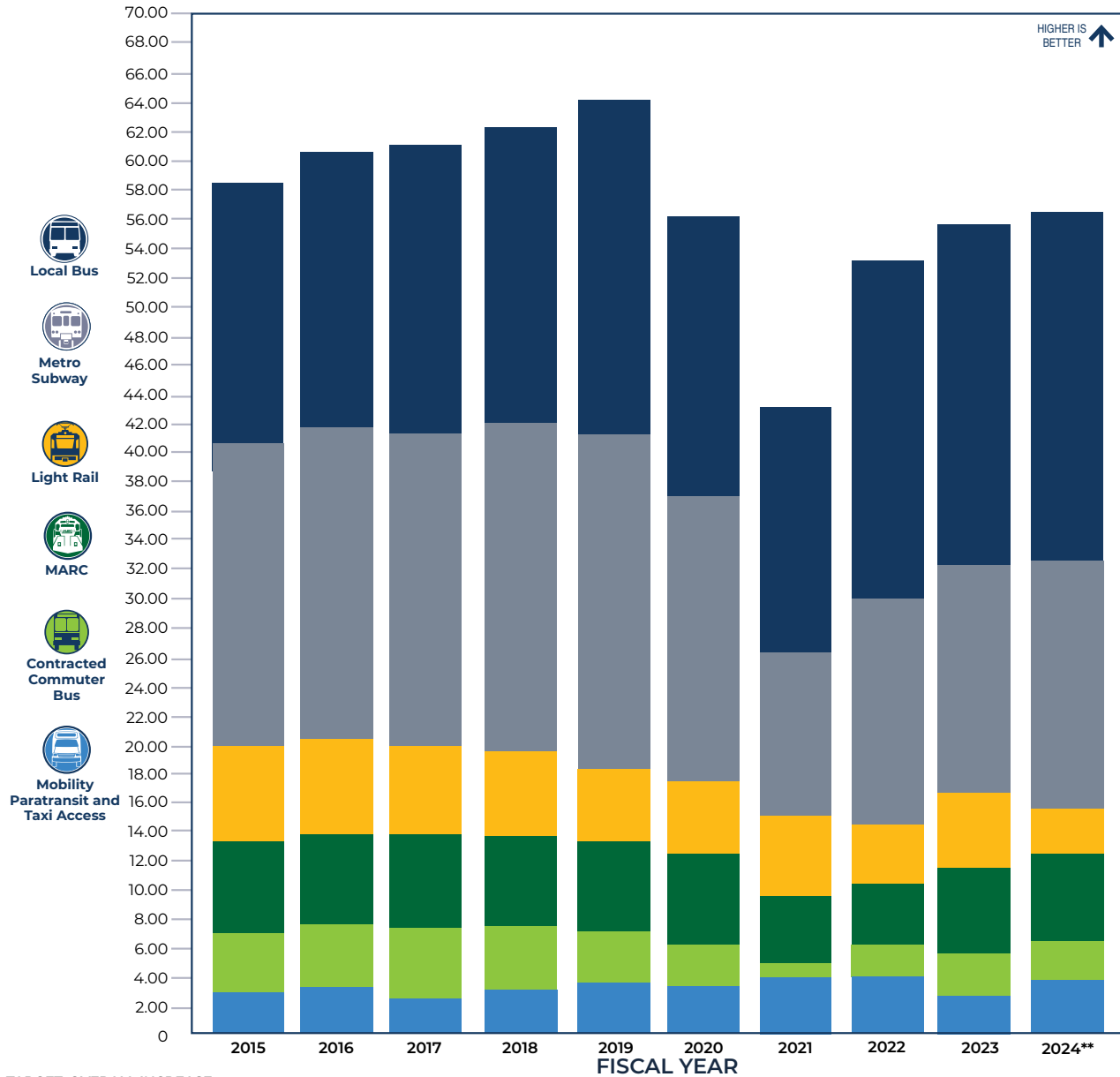
- MTA strives to make fixed-route services accessible for all populations of riders. For seniors and riders with disabilities, MTA uses enhanced wayfinding, better signage and announcement systems to assist the diversity of riders better.
- All of MTA's planned expansion of the transit system, including implementation of the Red and Purple Line projects and the QuickLink 40, and a focus on providing better connections to housing, employment centers and shopping through TOD policies, will benefit seniors and people with disabilities who choose to ride or rely on transit.



ANNUAL REVENUE VEHICLE MILES OF MTA SERVICE PROVIDED*



Revenue vehicle miles measure each mile for which a transit vehicle is in service and accepting customers. This measure indicates transit's level of service.



TARGET: OVERALL INCREASE

* All units are revenue miles (millions). Excludes LOTS and WMATA.

** 2024 data are preliminary and subject to change.

What Is the Trend?

- The annual revenue vehicle miles of MTA service is now operating near pre-pandemic levels across all transit modes and has been increasing overall since FY 2021. The exceptions are paratransit and taxi access, which have not yet reached pre-pandemic levels, and light rail, which was higher than pre-pandemic levels in FY 2021 and FY 2022 but saw a decrease in FY 2023.

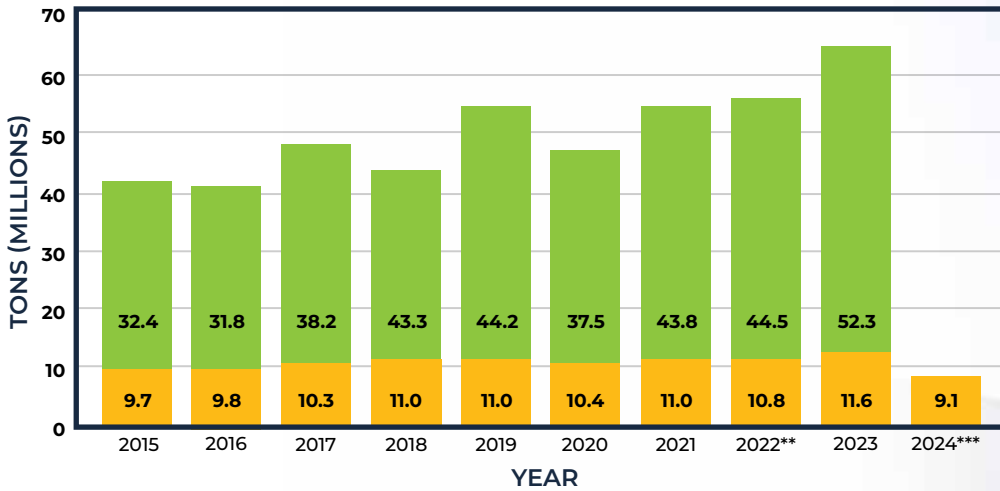
What Are Future Strategies?

- MTA is advancing BMORE BUS, a transit plan for the Baltimore region that identified bus service improvements that could be possible with expanded resources during the next 10 years.
- MTA also is moving forward on planning for the Red Line and completing construction of the Purple Line light rail project.
- The MARC Growth and Transformation Plan is under development and will shape a refreshed vision and objectives, findings from market analysis and equity assessments, recommendations for necessary capital improvements, and implementation strategies for MARC.



Objective: Improve the Efficiency and Competitiveness of the Port of Baltimore and BWI Marshall Airport

PORT OF BALTIMORE FOREIGN CARGO TONNAGE AND MPA GENERAL CARGO TONNAGE*



■ Port of Baltimore foreign cargo tonnage (CY)**
■ MPA total general cargo tonnage (millions) (FY)

TARGET: NONE

* MPA cargo data is provided by FY, but Port information is reported using the latest full CY because Port statistics combine data for public and private marine terminals that use different fiscal year reporting timeframes. Therefore, 2024 data cannot be reported until early 2025.

** All Port of Baltimore Foreign Cargo Tonnage data have been revised from previous report.

*** MPA general cargo includes both foreign and domestic waterborne cargo, whereas, Port-wide data includes only foreign waterborne cargo. Port-wide data for CY 2024 is not yet available; FY data for 2024 is an estimate.

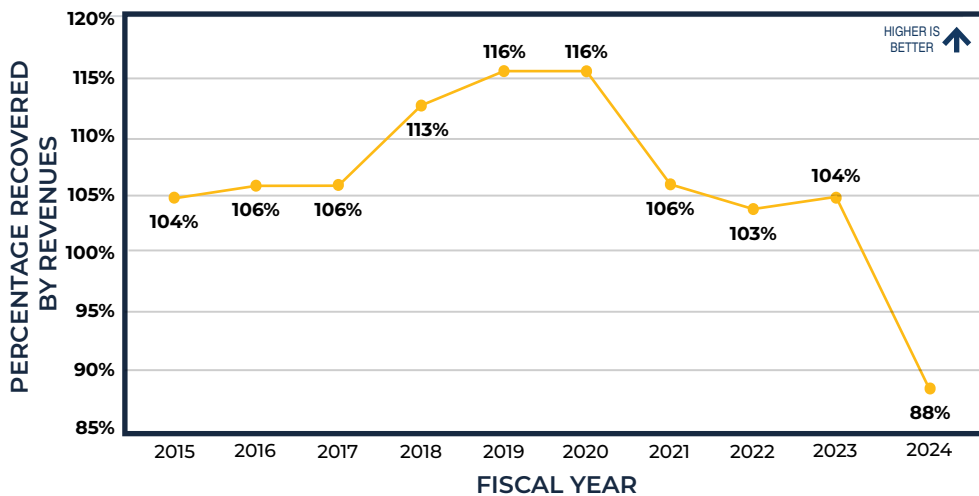
What Is the Trend?

- Several records were set by the Port in FY and CY 2023. The Port handled 52.3 million tons of cargo worth \$80.8 billion, both surpassing previous marks. Records also were set for containers, farm and construction machinery, and general cargo. The Port of Baltimore is ranked as the 9th largest port in the U.S. in terms of foreign cargo tonnage and 9th largest in terms of dollar value.
- While bulk products make up approximately 73% of the Port's total international cargo, general cargo products account for 92% of its value.
- Due to the collapse of the Key Bridge, vessel access to the terminals inside of the Key Bridge, including MPA's terminals, were limited severely from March 26 through June 10, 2024. This had a negative effect on the amount of general cargo moved through the State-owned marine terminals in FY 2024.

What Are Future Strategies?

- Construction on the Maryland portions of the Howard Street Tunnel project began in August 2023. This project will allow the Port of Baltimore to handle double-stacked container trains, increase its container business and generate additional jobs.
- Maryland received a \$31 million USDOT grant to strengthen and update Dundalk Terminal's Berth 11, which will position the Port for continued growth. Upgrades include replacing wharf deck and updating key infrastructure like drainage, utilities, mooring equipment and flood barriers.

PERCENTAGE OF MPA OPERATING BUDGET RECOVERED BY REVENUES*



TARGET: NONE

* This measure is calculated by dividing operating revenues by operating expenses and exclusions. Revenues are derived from activities such as dockage, wharfage, crane rental, acreage/shed/office space leases, cruise business and more.

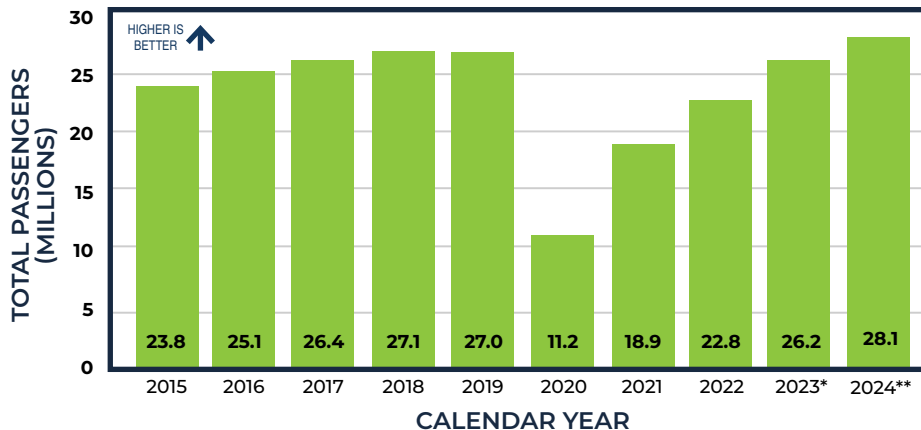
What Is the Trend?

- Due to the collapse of the Key Bridge, vessel access to the MPA's terminals was limited severely from March 26 through June 10, 2024. This limited access had a negative effect on MPA revenues.

What Are Future Strategies?

- MPA will continue to market the Port of Baltimore to steamship lines and cargo owners to ensure that they know that the Port has reopened and is capable of handling all ships with no restrictions after the Key Bridge incident.
- In October 2024, double-stacked rail operations to and from the Port of Baltimore launched as a part of the Howard Street Tunnel Project. This will open new opportunities for intermodal rail service in the Northeast and from the Port of Baltimore to Midwest markets, generating thousands of new jobs and delivering critical benefits to the region months earlier than expected.

BWI MARSHALL AIRPORT TOTAL ANNUAL PASSENGERS



TARGET: INCREASE

* 2023 data have been revised from previous report.

** 2024 data are preliminary and subject to change.

What Is the Trend?

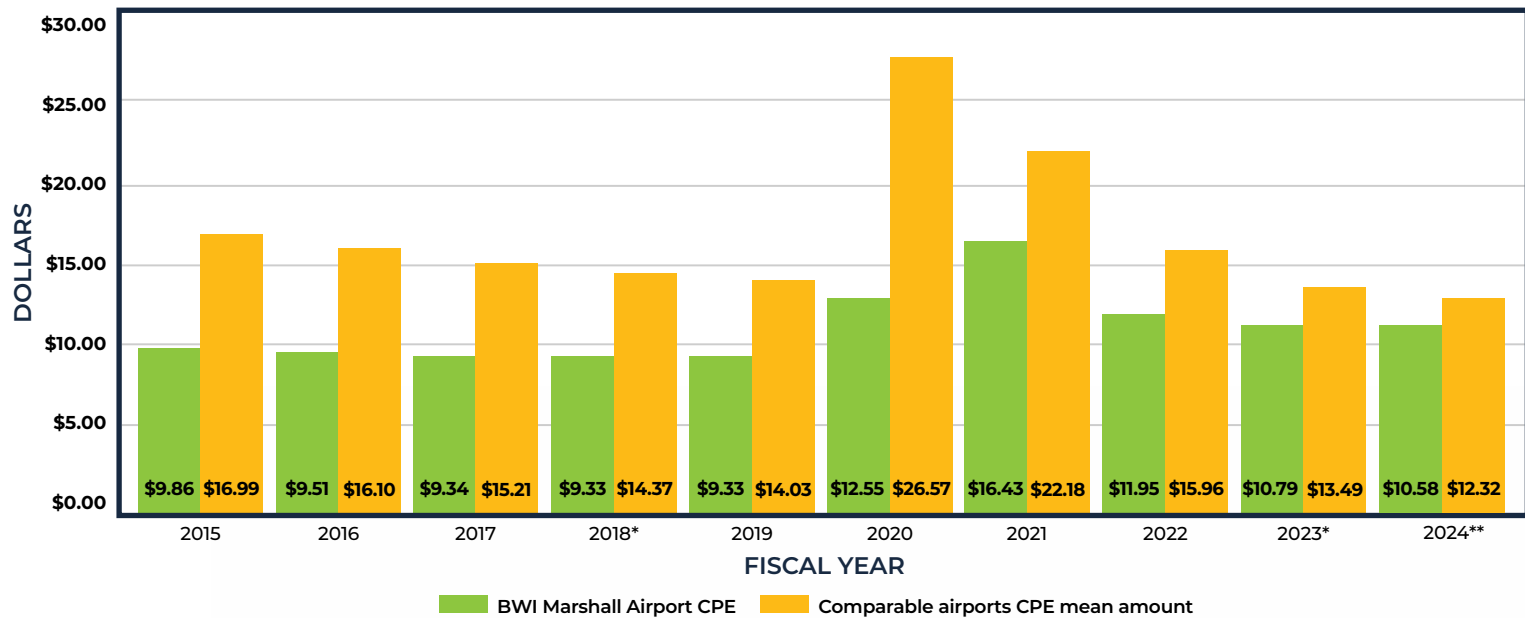
- BWI Marshall Airport continues to see an increase in total annual passengers and is projected to surpass pre-pandemic activity levels in CY 2024 with more than 28 million passengers, a new record for the airport. BWI Marshall Airport also set a new record of accommodating more than 1.3 million international passengers in CY 2023, a 2.6% increase from the previous 2018 record.

Both June and July 2024 broke the record for monthly passenger traffic with more than 2.6 million passengers, an increase of 11% and 8% during 2023, respectively.

What Are Future Strategies?

- Many projects are underway at BWI Marshall Airport to improve capacity, efficiency, and the customer experience. These include a \$425 million Concourse A/B Connector and Baggage Handling System program, an upgrade of the central utility plant, airfield pavement reconstructions, the addition of two new jet fuel storage tanks and replacement of the hourly garage parking guidance system.
- MAA continues to market the airport and work with its airline partners to provide additional routes and expand BWI Marshall Airport's service offerings.
- MAA received more than \$14 million in federal grants in early 2024 to upgrade terminal facilities at BWI Marshall Airport and enhance the customer experience.

COMPARATIVE AIRLINE COST PER ENPLANED PASSENGER (CPE)



TARGET: BELOW THE MEAN OF COMPARABLE AIRPORTS***

* 2023 data has been revised from previous report.

** 2024 data is preliminary and subject to change.

*** Comparable airports are defined as Washington Reagan National, Washington Dulles International and Philadelphia International.

What Is the Trend?

- In FY 2024, BWI Marshall Airport continued to see strong operational and financial growth. As of May 2024, MAA's enplanements are at 12.2 million, a 9% growth from FY 2023. MAA's Operating Revenues have increased 6.3% or \$16.6 million through May 2024.
- Effective July 1, 2019, MAA entered into a new airline agreement expiring June 30, 2026. Revenues increased due to negotiated terms, facility improvement projects beginning, and a review of operational cost allocation to airline cost centers. Additionally, the terminal rental rates increased by almost 14% in FY 2024 and airfield landing fees decreased by almost 10% due to higher activity and lower airfield capital costs.

What Are Future Strategies?

- BWI Marshall Airport continues to remain competitive in the region by increasing their signatory airlines. Frontier is now a signatory carrier capturing 3.5% of the market share in FY 2024. Sun Country became signatory as of FY 2025. MAA will look to manage operating and capital costs to keep a competitive CPE. This includes leveraging federal and other funding sources in the capital program as well as controlling operating costs.



FREIGHT ORIGINATING AND TERMINATING IN MARYLAND BY MODE— TOTAL TONNAGE AND TOTAL VALUE*

METHOD FOR MOVING FREIGHT	TOTAL VALUE (MILLIONS) CY 2024***	TOTAL TONNAGE (THOUSANDS) CY 2024***
Air	7,149	70
Multiple Modes & Mail Goods	71,498	6,741
Other**	192	64
Pipeline	9,260	45,438
Rail	13,807	21,004
Truck	318,265	225,613
Water	80,794	52,345
All Freight	500,964****	351,276****

TARGET: NONE

* Source: U.S. Department of Transportation Freight Analysis Framework (FAF5) the FAF version is 5.0, Freight Analysis Framework (FAF) (ornl.gov). FAF 5 is based on 2017 data. This version makes changes from previous versions in that it includes additional modal detail or classification than in the past. Therefore, previous FAF assessments cannot be accurately compared as value and tonnage may be attributed to different modes in previous versions. It is important to point out that FAF data are estimates and combinations of various data sources to identify what might be tonnage and value by mode for each State and zone in the nation. There is no source that provides a single verified number.

** Category "Other" includes movements not elsewhere classified such as flyaway aircraft, in and out of foreign trade zones and shipments for which the mode cannot be determined as stated in the documentation for the FAF5.

*** CY 2024 data are preliminary and subject to change.

**** Totals are slightly off when adding due to rounding.

What Is the Trend?

- Freight value in Maryland has continued to increase since the pandemic when it decreased between CY 2019 and CY 2020. Since 2020, value estimates increased to or near pre-pandemic values except in air cargo. Significant increases in values occurred in the categories of other and unknown freight, water and multiple modes and mail.
- The value of freight transported by water is calculated by MPA and the US Army Corps of Engineers. The Port was experiencing significant increases in cargo, which is expected to decrease this year with the collapse of the Key Bridge in March 2024.
- Freight with the highest value in, out and through Maryland travels by truck followed by water then multiple modes and mail.

What Are Future Strategies?

- MPA will support freight movement by leveraging federal and State funding sources along with partnering with private sector shippers, logistics, manufacturing, retail and distribution businesses to increase goods movement within, into and out of Maryland.

NUMBER OF NONSTOP AIRLINE MARKETS SERVED



TARGET: 2030: 90; 2050: 100

* Data has been revised from previous report.

What Are Future Strategies?

- MAA's Air Service Development continually meets with airlines to discuss new or increased air service at BWI Marshall Airport, highlighting that it allows airlines access to a large population center with relatively high median household income. Discussions also focus on BWI Marshall Airport's comparatively low airport costs and the MAA air service incentive program.

What Is the Trend?

- The number of nonstop markets, or destinations, served at BWI Marshall Airport almost has reached pre-pandemic numbers; 92 were serviced in FY 2024 compared to the peak of 93 in FY 2020.
- Southwest Airlines, BWI Marshall Airport's largest carrier, added new nonstop service to Belize, Colorado Springs, Richmond and Seattle. Spirit Airlines, the second largest carrier, added service to Boston, New Orleans, Portland, Sacramento, San Diego and San Jose. Frontier Airlines remained the fastest-growing carrier at BWI Marshall Airport, and they added service to Charlotte, Chicago-Midway, Cleveland, Detroit and Tampa. In Spring 2024, the airport welcomed service from startup carrier BermudAir to Bermuda.