



August Commission Report

Director's Update

Given by Rebecca Hupp, Airport Director

AUGUST 6, 2025

Consolidated Rent-A-Car Center (ConRAC)



- Ready return garage and customer service building have reached their full height.
 - Tower crane has been dismantled
- Framing of the terminal connector is in progress.
- Ramps are completed through level 5.
- Exterior concrete masonry is complete, with metal siding to be installed next.

Concessions Update

- First restaurant now open!
Welcome, Treefort! (Pre-Security)
- Opening this month:
 - Idaho Tap House (Concourse B)
 - Waffle Me Up/The STIL (Food Court)
 - Turas Flights & Bites (Concourse C)
- Starting Next:
 - Up and Away (Flying M Coffee)
 - Bardenay
 - Starbucks
 - Wendy's
- Celebratory Open House on Thursday, Aug. 21 from 11 a.m.-1 p.m.



Concourse Development and Terminal Improvements Program Update

Construction Manager/General Contractor:

- Received 7 Statements of Qualifications (Mar '25)
- Interviewed 4 shortlisted firms (May '25)
- Selected Hensel Phelps Construction Co. (Jun '25)

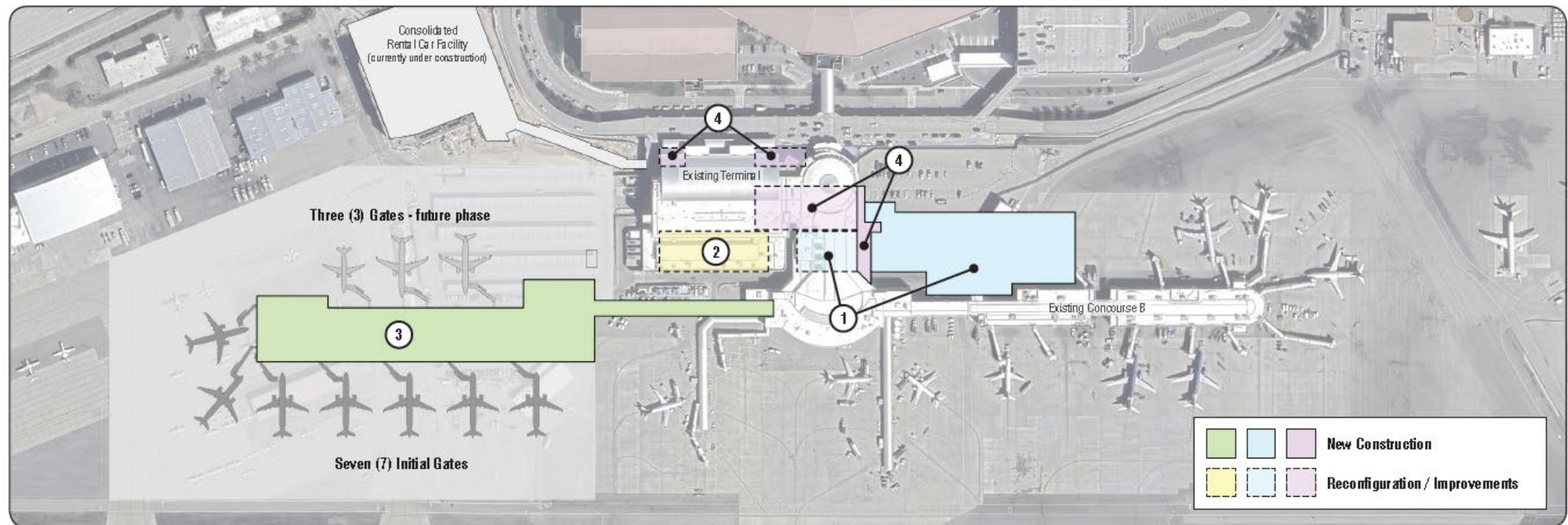
Evaluation Committee:

- 7 Member Committee: Cross-functional team
 - City Representatives (Airport, Mayor's Office)
 - Industry Representatives (Engineer, Architect, Airlines)
- Next Steps:
 - Contract scheduled for Council Agenda in August
 - Work Session to outline program, timeline and budget
 - Intend to award preconstruction in August, with Notice to Proceed in Sept.
 - Use Guaranteed Maximum Price (GMP) Amendments in Agreement to award construction of the work



Concourse Development and Terminal Improvements Program: DRAFT Schedule

- Pre-construction Award
 - Establish Not To Exceed (NTE) amount
 - Issue 3 Notices to Proceed
 - #1: Sep – Dec '25
 - #2: Jan '26 – Mar '27
 - #3: Beyond Mar '27
 - Bond Sales: With corresponding timeline to meet City Council Approval
- Construction
 - Establish NTE Amount
 - 5 Initial Guaranteed Maximum Price (GMP) Amendments: Each approved by City Council
 - GMP 1: Baggage System, 2027-2028
 - GMP 2: Central Utility Plant, 2028-2029
 - GMP 3: Concourse A, 2027-2029
 - GMP 4: Terminal Improvement Phase 1, 2027-2028
 - GMP 5: Terminal Improvement Phase 2, 2028-2029



BOI UPGRADE: CONCOURSE DEVELOPMENT AND TERMINAL IMPROVEMENTS

INITIAL SCOPE OF DEVELOPMENT (JULY 2025)

① BHS Replacement and Expansion

Purpose:

- Existing Baggage Handling System (BHS) was installed in the early 2000s and has reached end of life, requiring a full replacement.
- Portions of the existing BHS are currently at (and in some areas, already exceed) operational capacity. Combined with forecasted passenger growth, expansion of the BHS (including at CBIS, CBRA, Outbound Makeup, and Baggage Claim) is needed to meet current and future demand.

Implementation Approach:

- Commencement of project design is time-critical to meet anticipated equipment lead times, demand requirements, TSA review timelines, and construction schedule. Additionally, other components of the project (such as the Central Utility Plant) cannot proceed until BHS construction is complete.
- To maintain airport operations during construction, enlarged CBIS/CBRA and Outbound Baggage Makeup areas will be constructed in new locations, with the former constructed in the footprint of the existing Rental Car Counter area, and the latter constructed to the east of the existing Terminal and north of Concourse B.
- Once complete and operations are transitioned to the new locations, the vacated Outbound Baggage Makeup Room and CBIS/CBRA spaces will be repurposed into a Central Utility Plant.

② Central Utility Plant (CUP)

Purpose:

- Provides heating, cooling, and electrical supply for new Concourse A.
- Improves energy efficiency, sustainability, operational resiliency, and MEP systems redundancy at Boise Airport.
- Scalable for growth and enables potential integration of existing and future facilities into its MEP systems.

Implementation Approach:

- Central Utility Plant is proposed to be developed within the footprint of the existing Outbound Baggage Makeup Room, once the BHS Replacement and Expansion component of the project is complete.
- Construction and commissioning of the Central Utility Plant is time-critical and must be complete to enable Concourse A to open.

③ Concourse A Development

Purpose:

- Constructs a new concourse, up to 10-gates, to be located west of the existing Terminal I (opposite of Concourse B).
- Existing Concourse B Terminal has exceeded its capacity and several systems are in danger of failing. Construction of a new concourse accommodates existing and forecasted increase in passenger demand and supports airlines, the airport's and the community's projected growth.
- Enhances airport and airlines' operational flexibility. Evolving aircraft fleet mixes are bringing larger aircraft to Boise Airport, applying pressure on existing spaces (such as holdrooms, restrooms, concessions, and circulation), which are undersized for current and projected fleet mix. Concourse A's programmatic spaces will be sized for larger Group III aircraft, improving the overall passenger experience and level of service (LoS).

Implementation Approach:

- As the primary component of the project, advancement of design is critical to help ensure the facility can be designed, constructed, and completed in-time to accommodate projected growth.
- Timing of completion will be coordinated with commissioning of the Central Utility Plant, which will provide the heating, cooling, and electrical supply for the Concourse A.
- Pricing of gate implementation is currently being explored.

④ Terminal Improvements

Purpose:

- Provides enhancements to the existing Terminal to optimize operational functions and provide additional capacity to meet forecasted passenger growth. Areas to be improved include ticketing, curbside, security checkpoint, passenger circulation, and baggage claim.
- Improves passenger flow, passenger processing, accessibility, and overall operational efficiency.

Implementation Approach:

- Design of Terminal Improvements will occur in tandem with design of other project components, to ensure coordination of design and implementation.
- Construction will be coordinated to maintain operations and align with projected growth models.

Concourse A Apron



- Concrete paving is complete for Phase 1A.
- Currently paving asphalt in the northwest portion of the new apron.
- Up next: Coordinating with stakeholders and preparing for Phase 1B in mid-August.

Airfield Projects



East Deice Pad

- Substantial completion reached Aug 1.
- Will allow for more efficient winter operations.

GA Area #3 Access Rd

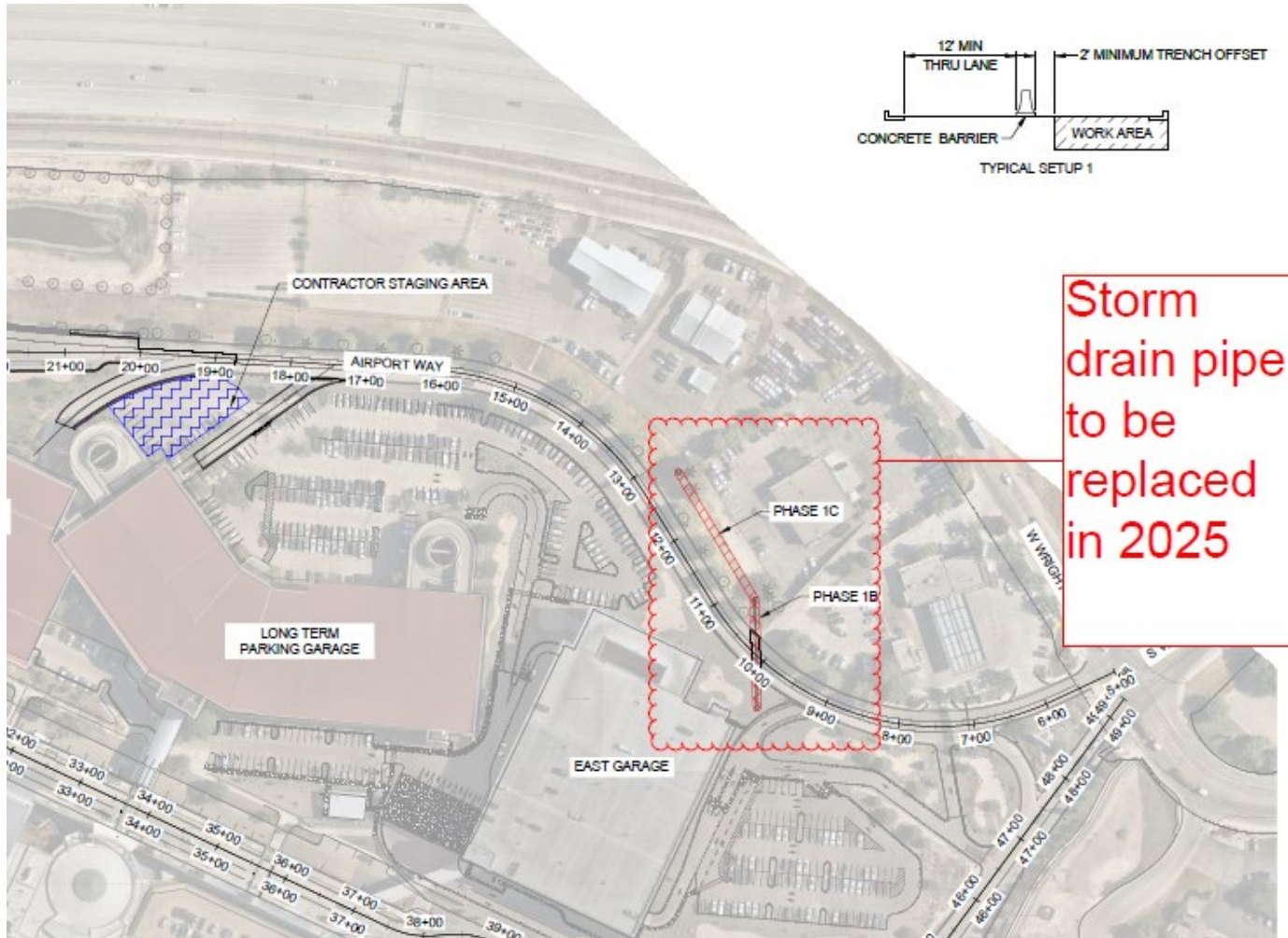
- Substantial completion reached Aug 1.
- Road will provide landside access to future hangars in General Aviation Area #3.



Airfield Gates

- Gate 30 (next to ARFF Station) reached substation completion July 17.
- Gate 18A pedestrian gate near Idaho Helicopter expected to be completed this month.

Airport Way Drainage Work



- Replacing and lining storm drainpipe under Airport Way.
- Project timing TBD, targeting September after the bulk of summer travel concludes.
- Airport Way will be reduced to one lane in the project during the 12-day project (**12:30am – 9:30am ONLY**).
- Awareness campaign planned to notify the community prior to work starting.

Airport Triennial Exercise

- Boise Airport TriEx will be held tomorrow – August 7.
- Multi-jurisdictional, real-world drill that simulates a major incident to test and evaluate the airport's emergency plan and readiness.
- Required by the FAA every three years.



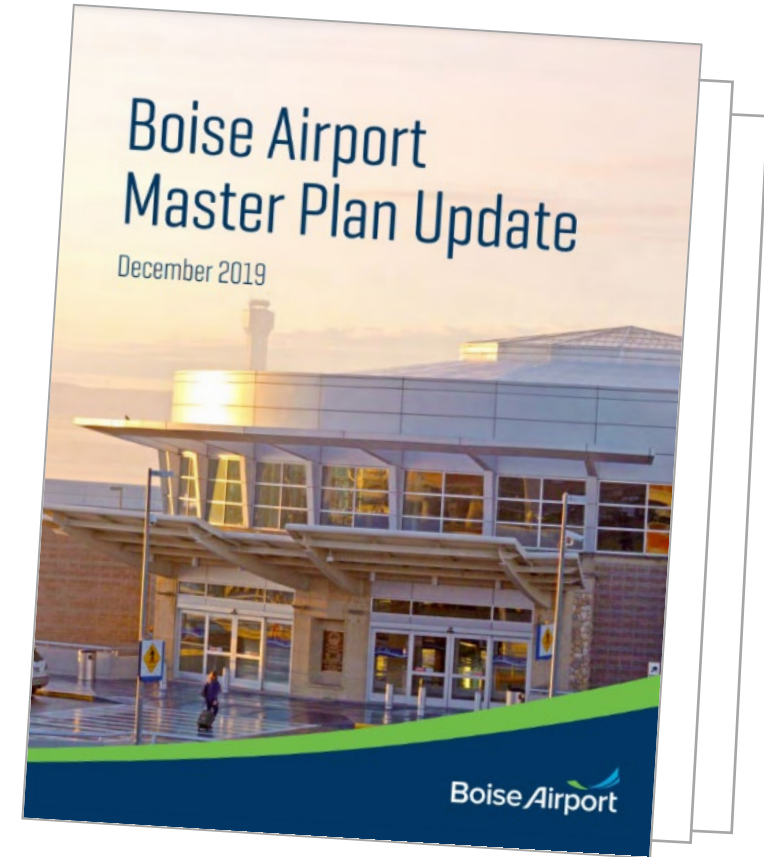
Ongi Etorri, Jaialdi!



- Kaixo (hello), Jaialdi 2025!
- About 30,000 people visited Boise for the Basque festival, which was last held in 2015.
- BOI hosted a special welcome ceremony for Basque President Imanol Pradales.

Master Plan Update

- InterVISTAS was onsite July 29 for the first Technical Advisory Committee meeting.
- Next steps include stakeholder interviews, aviation forecasts for FAA approval, and aerial and ground surveys.
- The Master Plan will guide airside and landside facility development for the next 20 years.



Staff News



Jeff Lysy



David
Schummer



Luke Vance

Jeff Lysy, David Schummer and Luke Vance have all been promoted from Operations Specialist Seniors to Operations Leads – congratulations! All three were promoted based on their constant desire to learn more, positive can-do attitudes, strong work ethics and dedication to safety.



JD Lewelling joined the Engineering Team in June as a Project Manager. He previously worked at the Idaho Transportation Department. Welcome, JD!

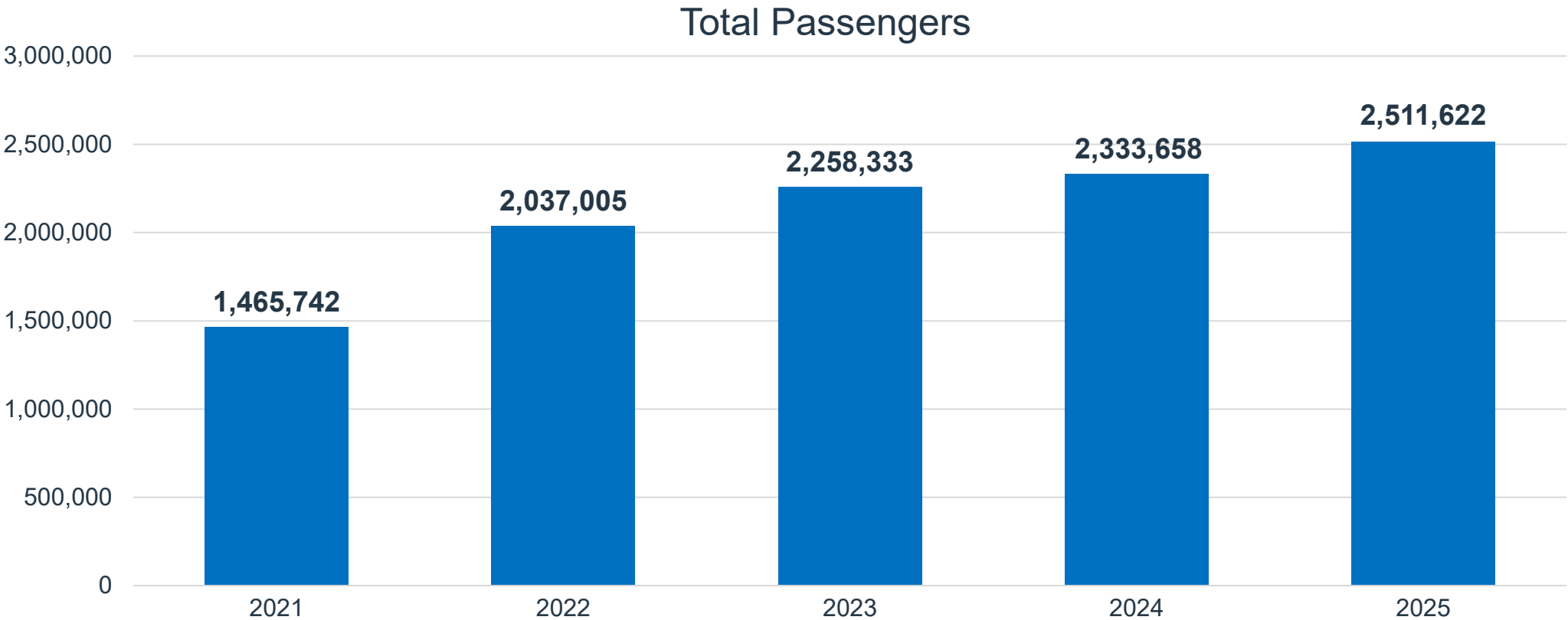
Thank you, Mahi!



- **Maheswari Ramesh** joined the Engineering Team as a Project Management intern for the summer. Her last day is Aug. 15th. During her time here, Mahi had the opportunity to shadow many staff members to get a comprehensive understanding of the airport environment.
- Mahi is majoring in Aviation and Aerospace Management at Middle Tennessee State University.
- We wish her the very best in her career and are grateful for the time she spent at BOI!

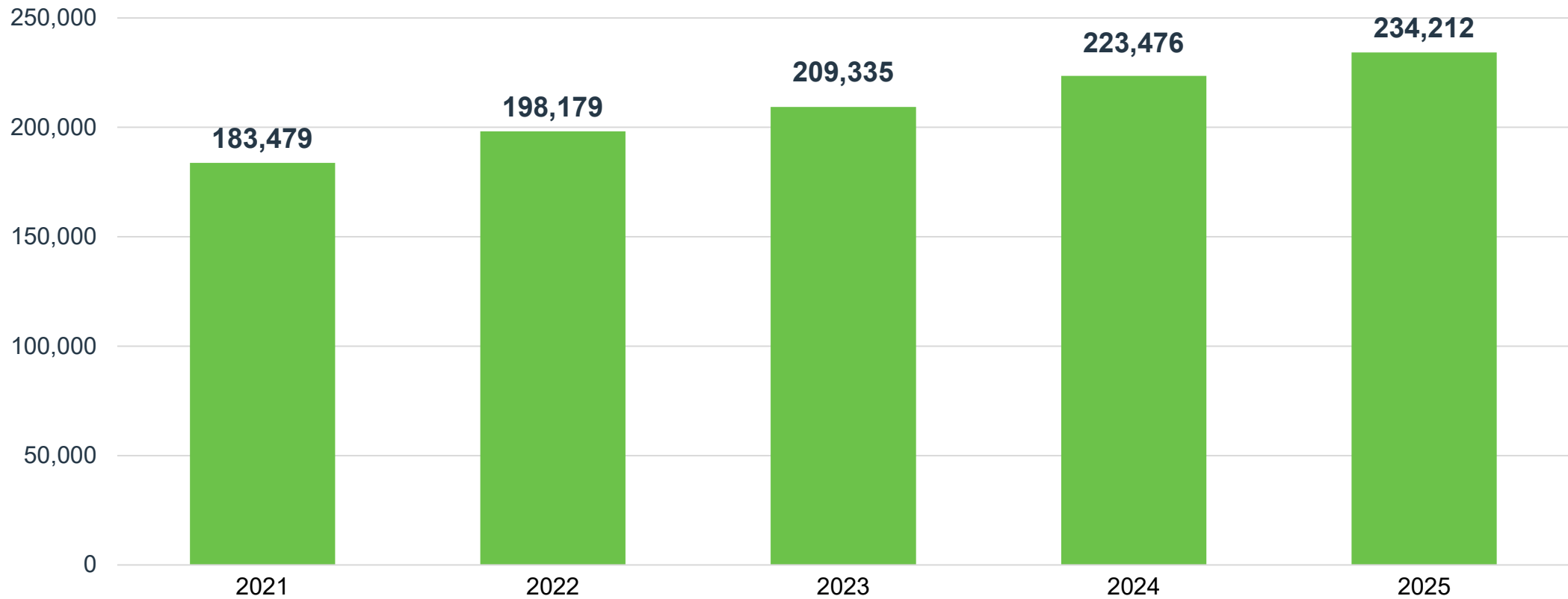
2025 YTD Total Passengers (through June)

Passenger counts are up 8% over last year!



June Enplanements

Enplanements are up 5% from June 2024.

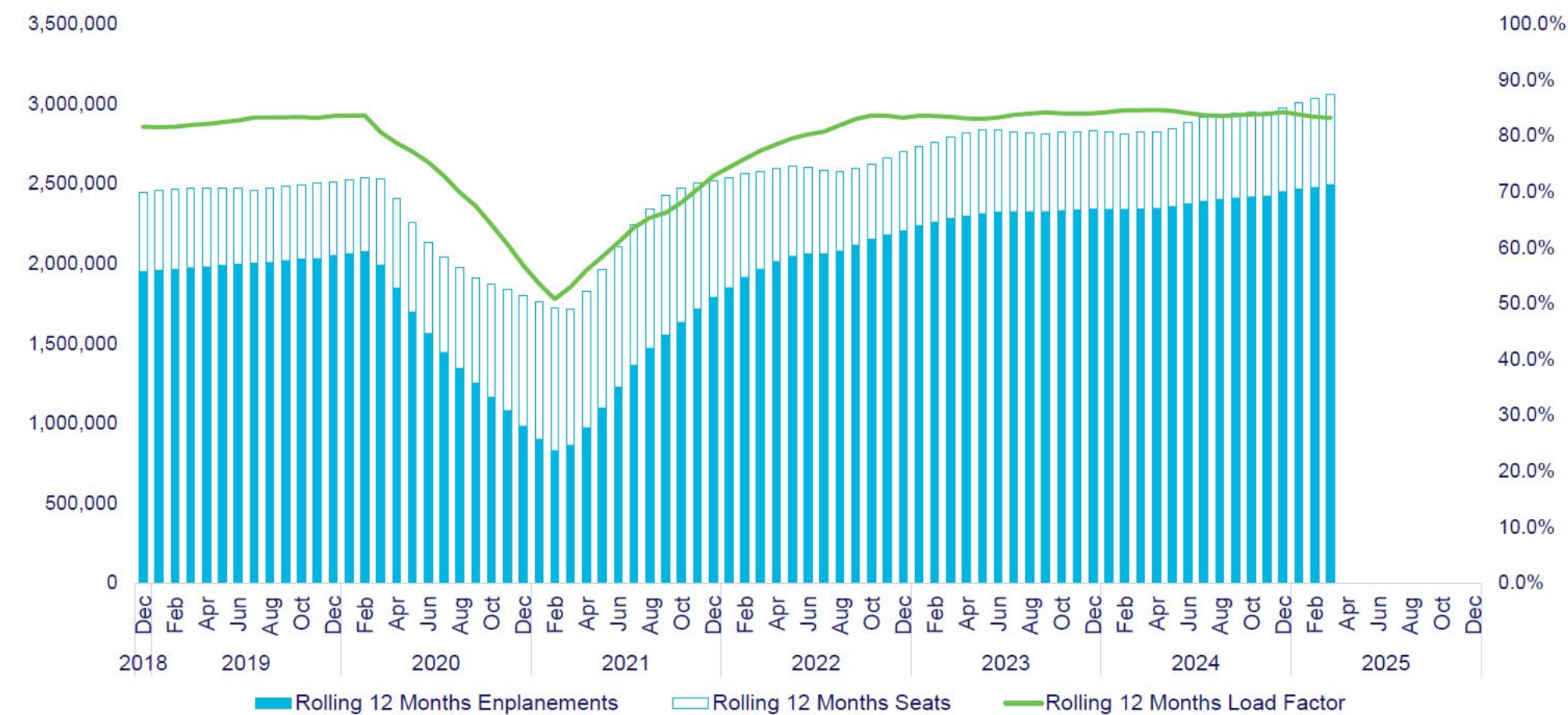


Top Origination/Destination Markets

BOI TOP 25 O&DS YE Q1 2025						
Rank	Airport	Pax	PDEW	Revenue	Avg. Fare	Yield
1	SEA	385,206	527.7	\$ 46,232,615	\$ 120	\$0.30
2	PHX	257,376	352.6	\$ 38,772,282	\$ 151	\$0.20
3	LAS	251,539	344.6	\$ 26,884,616	\$ 107	\$0.21
4	PDX	197,368	270.4	\$ 29,059,837	\$ 147	\$0.43
5	DEN	187,134	256.3	\$ 29,578,367	\$ 158	\$0.24
6	SMF	174,653	239.3	\$ 21,472,793	\$ 123	\$0.28
7	SAN	168,037	230.2	\$ 25,774,216	\$ 153	\$0.20
8	LAX	166,547	228.1	\$ 26,622,995	\$ 160	\$0.24
9	GEG	129,078	176.8	\$ 17,740,368	\$ 137	\$0.48
10	SNA	128,980	176.7	\$ 16,654,566	\$ 129	\$0.19
11	BUR	118,845	162.8	\$ 14,227,637	\$ 120	\$0.18
12	SFO	99,857	136.8	\$ 16,319,505	\$ 163	\$0.31
13	SJC	93,716	128.4	\$ 12,968,411	\$ 138	\$0.26
14	DFW	84,782	116.1	\$ 22,027,684	\$ 260	\$0.20
15	OAK	84,504	115.8	\$ 10,579,575	\$ 125	\$0.25
16	SLC	80,635	110.5	\$ 17,879,589	\$ 222	\$0.76
17	ORD	71,418	97.8	\$ 18,048,528	\$ 253	\$0.18
18	MCO	68,234	93.5	\$ 15,418,550	\$ 226	\$0.10
19	MSP	65,858	90.2	\$ 15,996,353	\$ 243	\$0.21
20	ATL	60,903	83.4	\$ 17,822,213	\$ 293	\$0.16
21	AUS	48,968	67.1	\$ 9,716,168	\$ 198	\$0.14
22	HNL	44,563	61.0	\$ 13,444,980	\$ 302	\$0.11
23	ONT	44,528	61.0	\$ 7,086,109	\$ 159	\$0.24
24	BNA	42,845	58.7	\$ 9,945,147	\$ 232	\$0.14
25	IAH	41,168	56.4	\$ 8,912,494	\$ 216	\$0.15
BOI TOTAL		4,903,951	6,717.7	\$ 1,048,528,769	\$ 214	\$0.18

19 of the top 25 markets had increased passengers year-over-year, with Orlando increasing by the highest percentage (20%), followed by Burbank (16%), then Portland and Phoenix (13%).

Boise Traffic/Capacity Trends

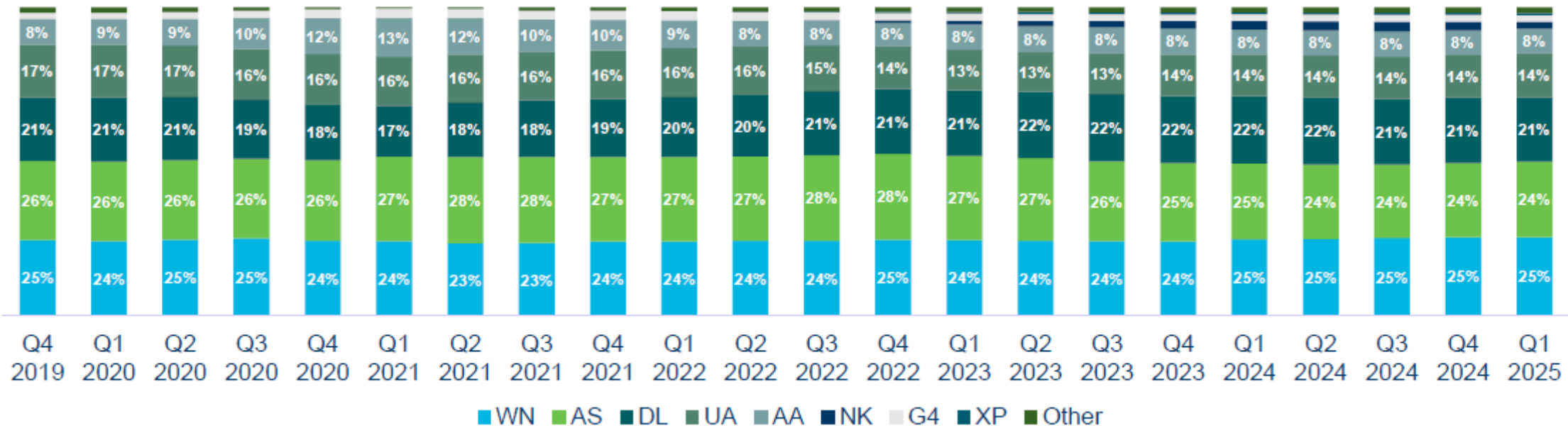


Load factor decreased slightly at the beginning of 2025 due to capacity increasing.

Airline Market Share

WN remained the market share leader in YE Q1 2025, leading AS by just one point.

BOI O&D PASSENGER SHARE BY CARRIER
Rolling 4 quarters O&D passenger share



Quarterly Report: Q1 2025

Boise Forward Looking Schedule

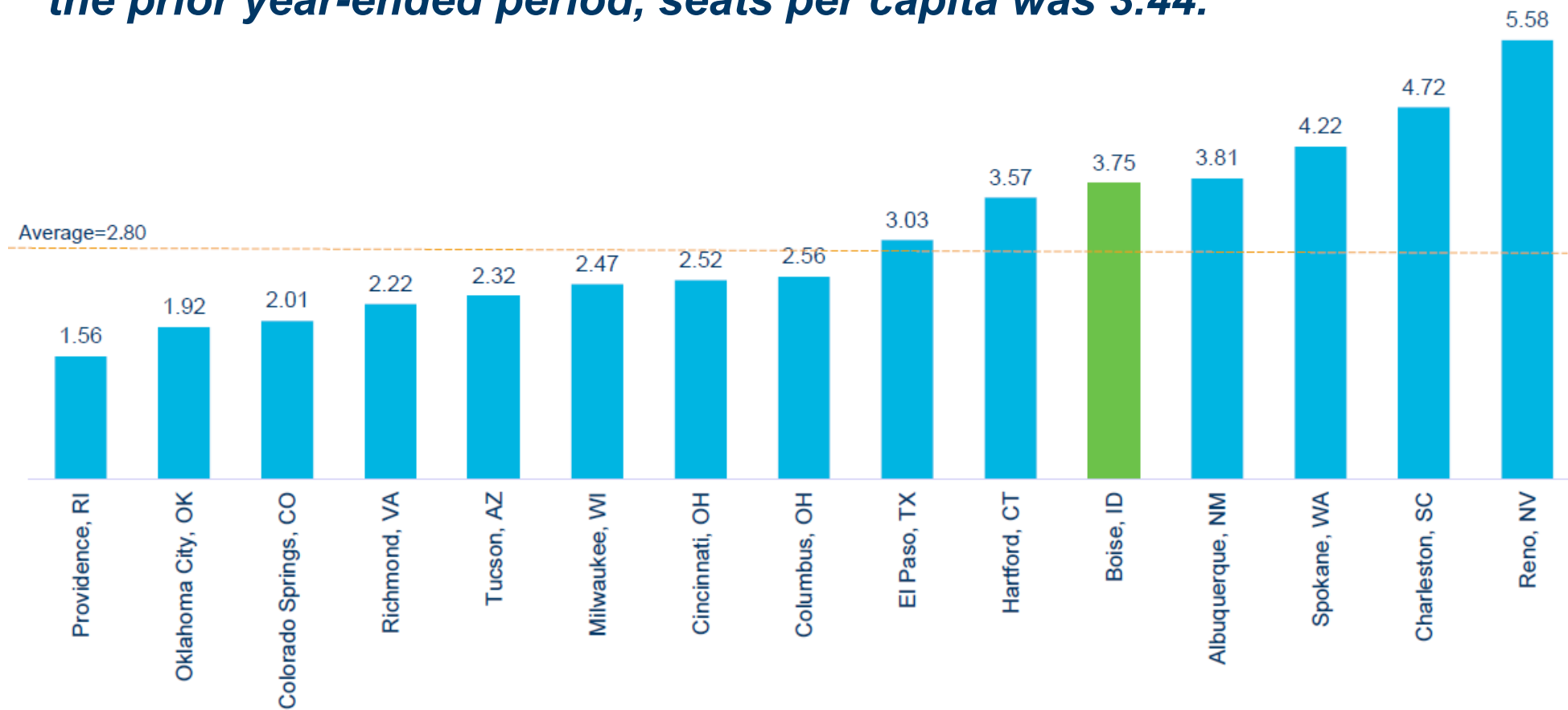
Over the next 6 months, BOI's flights are scheduled to be up 3% and seats are scheduled to be up 5% compared to the same months in the prior year.

FLIGHTS		Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25
BOI TOTAL FLIGHTS		3%	2%	3%	2%	5%	4%

Seats		Jul-25	Aug-25	Sep-25	Oct-25	Nov-25	Dec-25
BOI TOTAL Seats		3%	3%	7%	4%	7%	3%

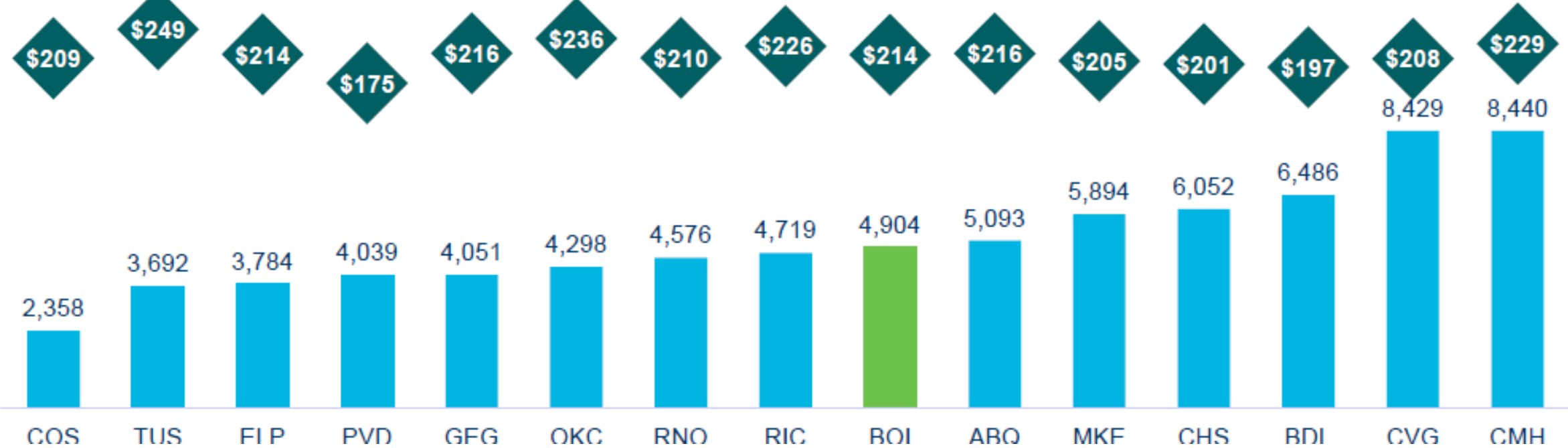
Seats Per Capita Comparison

At 3.75, BOI had the 5th highest seats per capita of all the comparison markets. In the prior year-ended period, seats per capita was 3.44.



Origination/Destination Passenger and Airfare Comparison

YE Q1 2025 passengers in thousands (bars) and average fares (diamonds)



BOI ranked 9th highest in O&D passengers and tied for the 9th highest average domestic fare.

Year-Over-Year Comparisons

NONSTOP MARKETS/SEATS YOY COMPARISON

	YE Q1 2025			YoY Change		
Market	Nonstop Markets	O&D Pax	Total Seats	Nonstop Markets	O&D Pax	Total Seats
COS	20	2,358,360	3,084,852	4	(1%)	2%
TUS	19	3,692,030	4,933,056	0	1%	10%
ELP	18	3,783,750	5,300,302	2	1%	5%
PVD	38	4,038,770	5,219,880	5	15%	23%
GEG	20	4,051,388	5,065,228	1	3%	1%
OKC	24	4,298,035	5,687,396	0	3%	3%
RNO	23	4,575,995	6,299,142	0	6%	9%
RIC	37	4,718,849	5,987,678	1	1%	0%
BOI	26	4,903,951	6,188,252	1	6%	8%
ABQ	30	5,092,849	7,032,044	2	(0%)	1%
MKE	35	5,894,299	7,723,220	5	0%	2%
CHS	53	6,052,368	8,019,474	1	1%	4%
BDL	46	6,485,768	8,233,240	7	7%	12%
CVG	55	8,428,590	11,453,324	4	3%	2%
CMH	46	8,440,069	11,177,266	2	5%	3%

Note: A nonstop markets is a market that operated >12 departures in a year

BOI tied for 3rd highest percentage passenger increase and was had the 5th highest percentage seat increase of the comparison markets.

Top 10 Operating Revenue Description	FY 2025	FY 2024	\$ Change	% Change
Parking Lot	\$ 17,061,671	\$ 16,005,693	\$ 1,055,977	7%
Signatory Airline Landing Fees	\$ 10,283,936	\$ 7,286,102	\$ 2,997,834	41%
Terminal Rent - Airlines	\$ 4,981,180	\$ 3,878,268	\$ 1,102,911	28%
Rental Car Concession	\$ 4,635,502	\$ 4,459,153	\$ 176,349	4%
Industrial Land Rent	\$ 3,221,842	\$ 3,257,438	\$ (35,597)	-1%
Terminal Concessions – Food/Beverage	\$ 1,384,151	\$ 1,479,707	\$ (95,556)	-6%
Landings/Freight	\$ 1,376,513	\$ 1,231,695	\$ 144,817	12%
Terminal Concessions – Retail	\$ 986,070	\$ 1,161,264	\$ (175,194)	-15%
Rideshare (TNC) Revenue	\$ 960,448	\$ 477,382	\$ 483,065	101%
Employee Parking	\$ 685,810	\$ 512,256	\$ 173,554	34%
Total Top 10 Operating Revenue	\$ 45,577,120	\$ 39,748,959	\$ 5,828,161	--
Other Operating Revenue	\$ 3,421,780	\$ 2,964,723	\$ 457,057	15%
Total Operating Revenue	\$ 48,998,900	\$ 42,713,682	\$ 6,285,218	15%

Top 10 Operating Expense Description	FY 2025	FY 2024	\$ Change	% Change
Personnel	\$ 13,160,936	\$ 11,369,586	\$ 1,791,350	16%
Indirect Cost Reimbursement	\$ 4,412,585	\$ 3,869,754	\$ 542,831	14%
Fire Service	\$ 3,564,610	\$ 3,430,845	\$ 133,765	4%
Policing Service	\$ 3,561,954	\$ 3,421,852	\$ 140,102	4%
Professional Services	\$ 2,414,191	\$ 192,198	\$ 2,221,993	1,156%
Parking Management	\$ 2,284,042	\$ 2,544,126	\$ (260,084)	-10%
R/M – Structural/Electrical/Plumbing	\$ 1,136,198	\$ 894,020	\$ 242,178	27%
Power	\$ 936,296	\$ 513,402	\$ 422,894	82%
Credit Card Fees	\$ 551,610	\$ 514,770	\$ 36,840	7%
R/M – Fleet Management	\$ 511,901	\$ 676,297	\$ (164,396)	-24%
Total Top 10 Operating Expense	\$ 32,534,324	\$ 27,426,850		
Other Operating Expense	\$ 4,991,147	\$ 5,706,027	\$ (714,880)	-13%
Total Operating Expense	\$ 37,525,471	\$ 33,132,877	\$ 4,392,594	13%



Boise Airport

www.iflyboise.com



BOI Air Service Update

Shawna Samuelson
Air Service and Marketing Manager

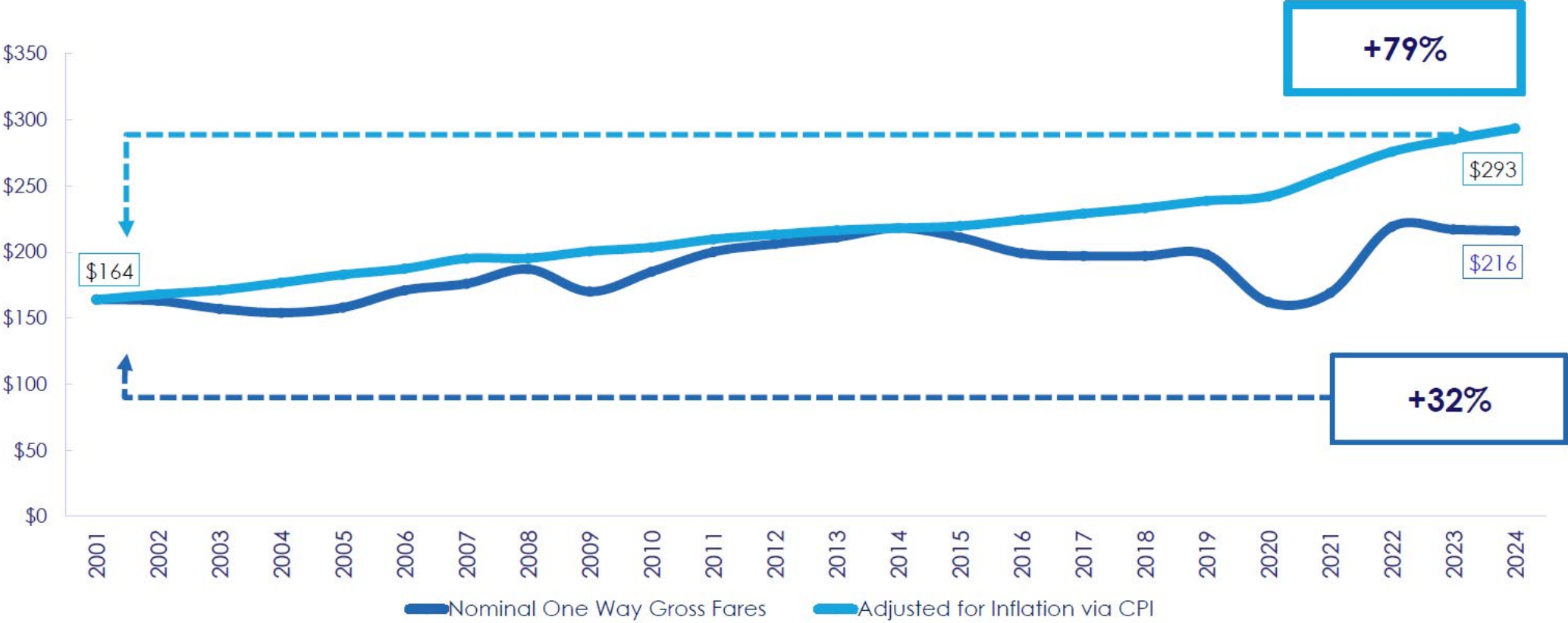
AUGUST 6, 2025

Recovering from the Pandemic

- Since 2020, airlines have dealt with supply issues, labor shortages and higher labor costs.
- Increased operational costs have led many carriers to decrease capacity across their networks in an effort to increase profit.
- Carriers are looking for ways to increase revenue: Whether meeting a consumer demand for premium seating or charging for checked bags.

Stagnant Air Fares

Compared to 2001, if domestic fares were adjusted for inflation, they would be 79% higher.



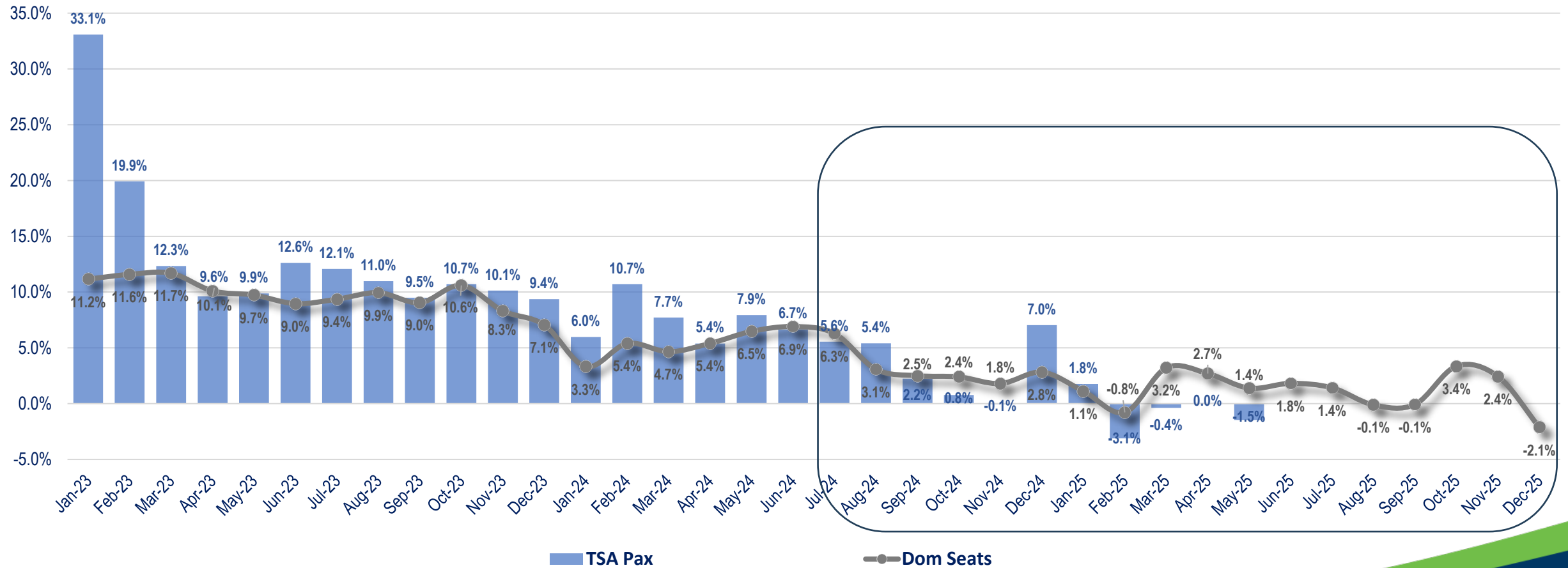
Note *: 2024 is YE 2Q 2024
Sources: DOT O&D Data via Diio Mi, BLS data; Ailevon Pacific Aviation Consulting analysis

Possible Turbulence

- In 2024 legacy carriers reported profits, while ULCC's did not, with the airline industry reporting an average 6% operating margin.
- Conditions changed at the beginning of 2025, influenced by:
 - Growing economic uncertainty impacting consumer confidence
 - Escalating trade tensions
 - Geopolitical landscape impacting travel behavior
- Airlines are taking steps to manage capacity and costs. The outlook for the remainder of the year remains uncertain and depends heavily on the broader economic environment and an airport's comparative advantage.

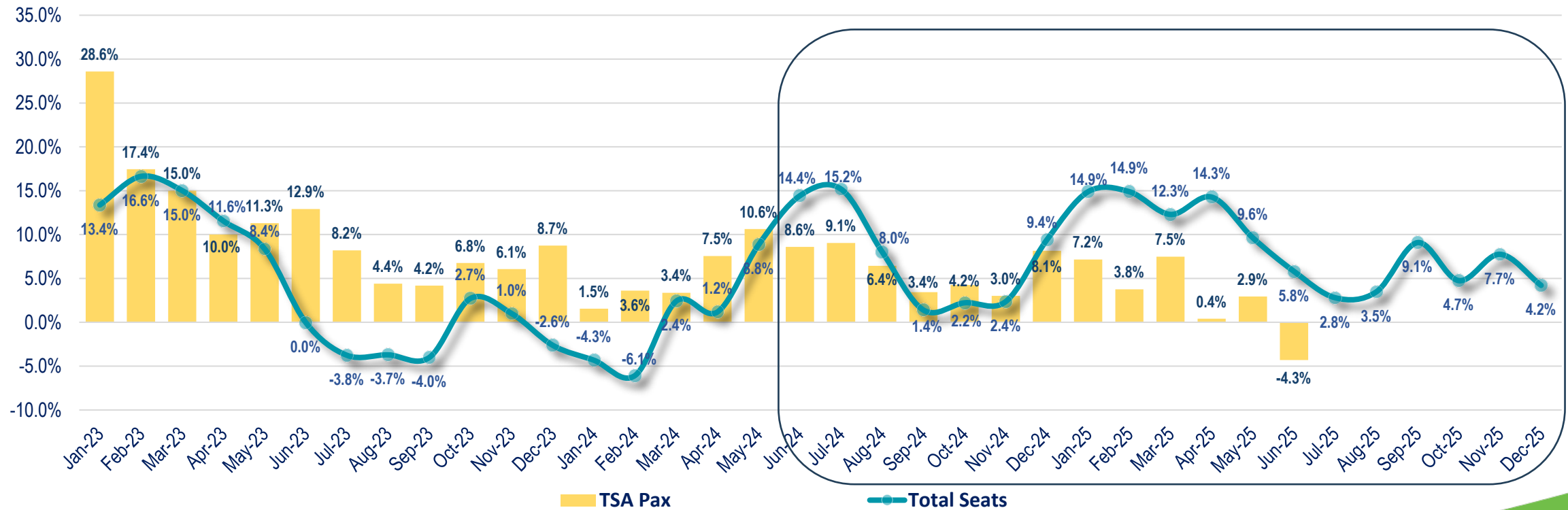
Change in TSA Passengers Versus Total Seats (US)

Monthly Changes Y-O-Y



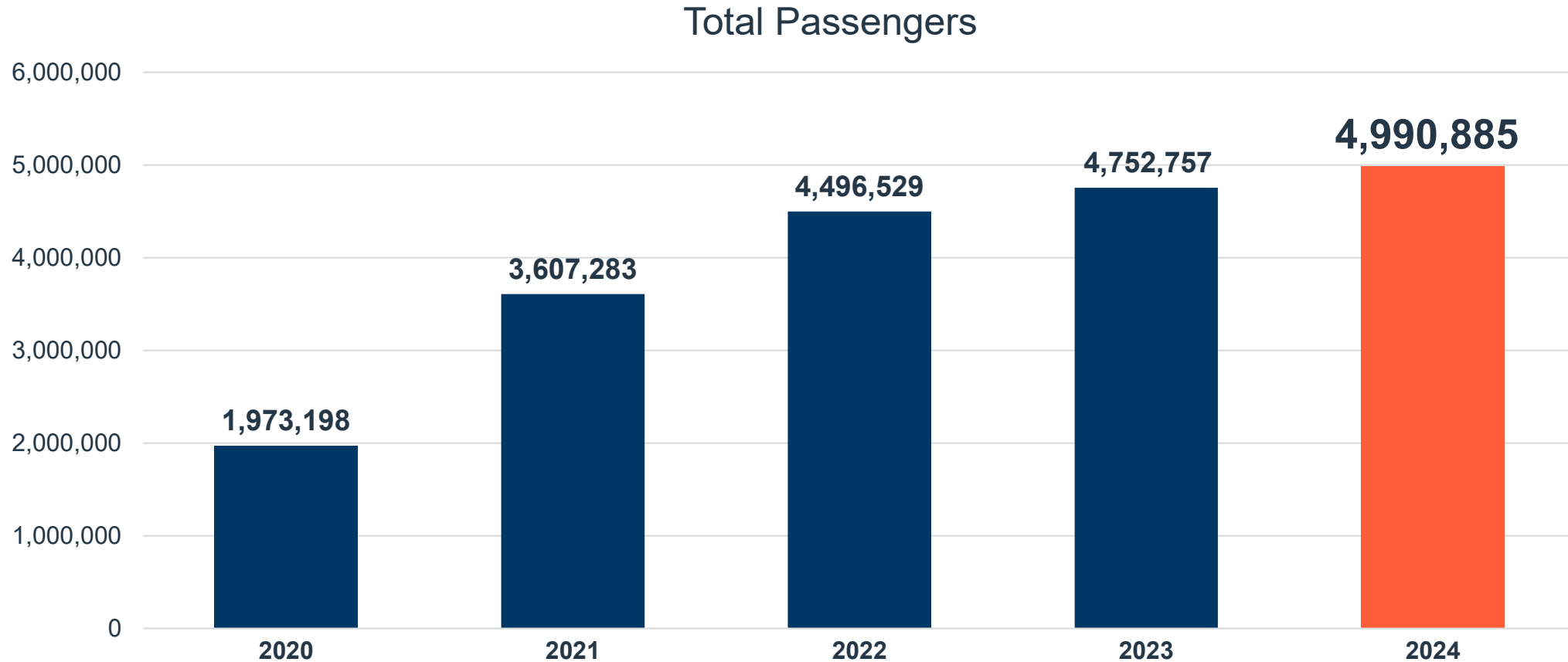
Change in TSA Passengers Versus Total Seats at BOI

Monthly Changes Y-O-Y



A(nother) Record Year for Passenger Travel

It's a three-peat! BOI has set records for passenger traffic in 2022, 2023, and 2024.



Our Comparative Advantage

4,990,885

2024 TOTAL PASSENGER
COUNT



**81%
INCREASE**

CHANGE IN TOTAL PASSENGERS
SERVED FROM 2014 – 2024, OR
2 MILLION PASSENGERS!

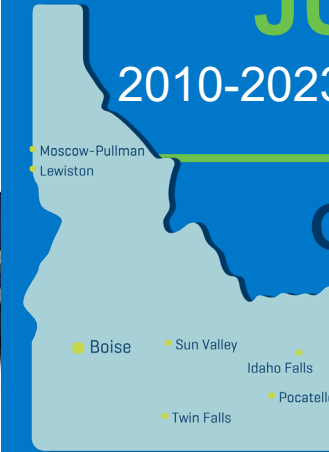
BOISE POPULATION GROWTH
FAR OUTPACES US AVERAGE

34% INCREASE

COMPARED TO

JUST 8%

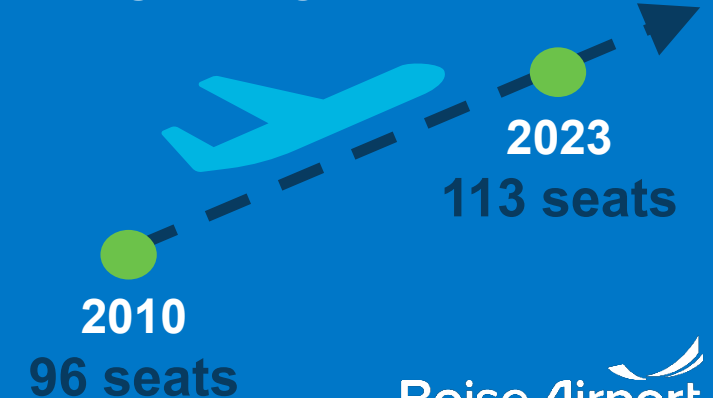
2010-2023 Population Growth



**Geographically
Isolated**

**No Other Airport
Within 75 Miles**

Average Gauge Trends



Boise Airport

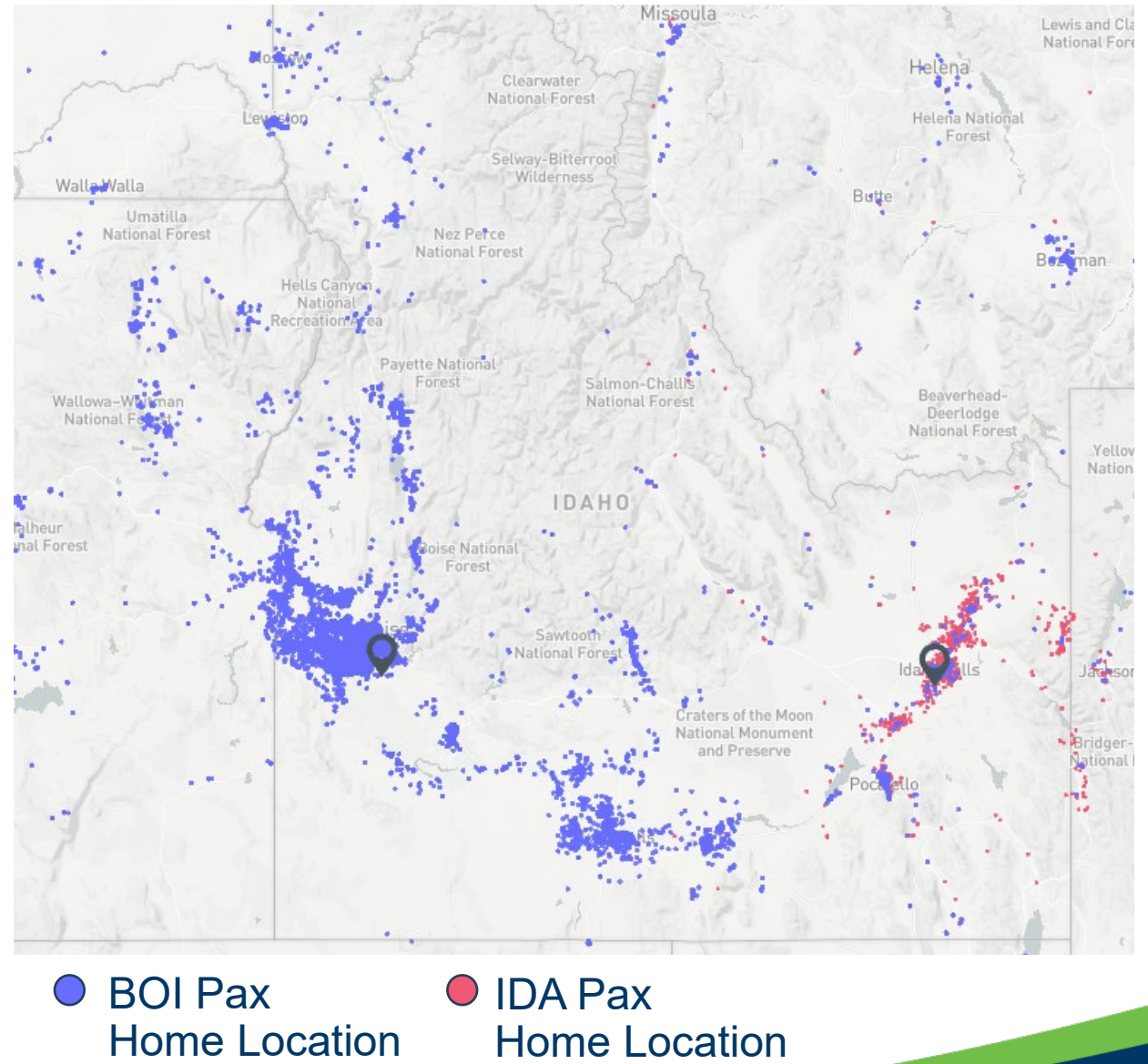
Catchment Area

Between 2022-2024, BOI:

- Saw an increase of 543,098 seats
- Saw an increase of 454,564 passengers

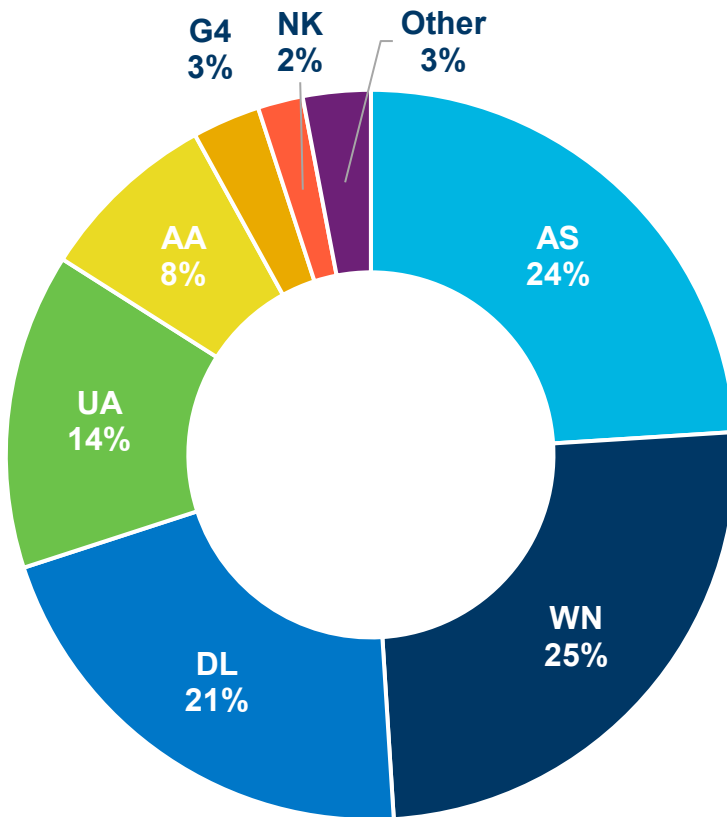
Meaning, we filled 83.7% of new seats offered

- Among medium hubs, BOI only trailed BUR in the percentage change of passenger-to-seat increases during this timeframe



A Competitive Market

Q1 2025 MARKET SHARE



TOP 5*
DOMESTIC DESTINATIONS:

1. Seattle, WA
2. Phoenix, AZ
3. Las Vegas, NV
4. Portland, OR
5. Denver, CO

*Based ON YE Q1 2025 Quarterly Report



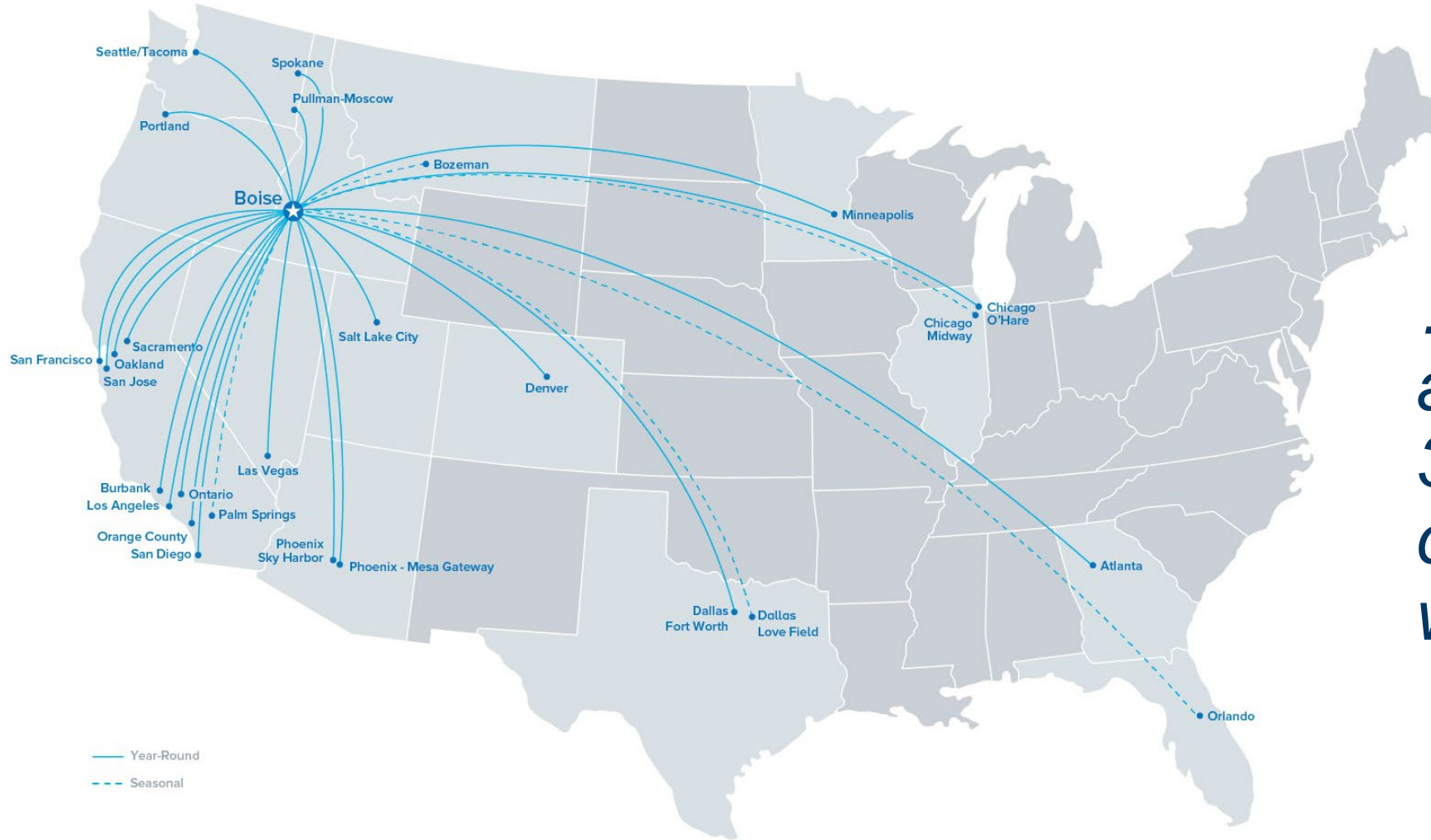
SERVED BY
9
AIRLINES



AIR SERVICE UPDATES:

- Alaska added year-round service to Bozeman, MT and Ontario, CA
- Sun Country joined BOI in June 2024 and Frontier joined in May 2025
- Return of service to Dallas Love Field (WN) and Chicago O'Hare (AA)

26 Nonstop Destinations



*...connecting to
approximately
350 single-stop
destinations
worldwide*

Approach to Air Service Development

- Attend air service events with airlines
 - Attended Jumpstart in June, where I met with 10 airlines, both current and potential
- Regular calls with airlines to understand current route performance and discuss opportunities
- Partner with community organizations
- Air Service Incentive Plan



Priority Markets for New Service

- BOI's Air Service Incentive Plan prioritizes target markets to reflect current passenger demands and increase connectivity.
- Target markets that would receive maximum incentive amounts include:
 - Anchorage
 - Boston
 - Charlotte, NC (Added 2023)
 - DC Airports (Added 2023)
 - Hawaii
 - Idaho intrastate
 - New York City
 - Orlando



Air Service Improvements Can Look Like:

- Upgauging aircraft to increase capacity.
- Increasing frequency on existing routes.
- Improving schedule placement for existing routes.
- Adding a new nonstop destination.
- Welcoming a new airline.





Boise Airport

www.iflyboise.com

Update for Minimum Standards for Aeronautical Services



Amy Snyder
Business Development Manager

Purpose of Minimum Standards

- Sets forth the minimum requirements for an operator to conduct commercial aeronautical activities at Boise Airport.
- Reasonable and not unjustly discriminatory access to all operators.
- No exclusive rights.
- Commercial activities include Fixed Base Operators (FBOs), Avionics, Instrument and/or Propeller Repair, Airframe & Powerplant Maintenance or Manufacturing, Flight Instruction, Aircraft Charter and Air Taxi Service, Aircraft Rental, Miscellaneous Commercial Aeronautical Activities (aerial photography, firefighting, aircraft sales, etc.).

Implementation and Updates

- BOI Minimum Standards were first approved by Boise City Council on March 10, 1998.
- FBO requirements were updated and approved by Boise City Council in January 2001.
- 2025 - Standards have been modernized to align with FAA guidelines and operational best practices.



Summary of Changes

Changes shall apply to existing operators to the greatest extent possible, as permitted under the terms of any existing agreement.

- Expanded and modernized the document structure
- Added mandatory compliance with environmental regulations, security protocols and safety management systems (SMS)
- Updated insurance requirements

Next Steps

- Post the updated Minimum Standards online for review and comments (minimum of 30 days).
- To City Council for approval.

Questions?

Thank you.



Boise Airport

www.iflyboise.com