



NH Tourism Summit – 2026

May 4, 2026

Air Carrier Outlook

- **U.S. Airline Industry:**
 - 2026 outlook for U.S. airlines was projected to be stable and cautiously optimistic
 - War in Iran and higher fuel prices leading to greater economic uncertainty
 - Business models strained by oil prices
 - Air fares and ancillary fees increasing
 - Impact on future demand uncertain
 - Winners and losers (Big 3; LCCs: ULCCs)
- **Airlines serving MHT:**
 - Carriers added 13% more seats in 2025 (The national average was 1%)
 - 3rd fastest growing airport in New England
 - 9th fastest growing small hub in the U.S.
 - New carriers, new routes gaining footing
 - Macro-level impacts will slow MHT growth
- **MHT Cargo:**
 - Third largest cargo facility in New England
 - UPS, FedEx, and Amazon Air processed a record 238 million pounds of cargo in CY '25.
 - Projected slow, sustained growth through 2026
 - Cargo numbers tend to track with the economy and demand for e-commerce



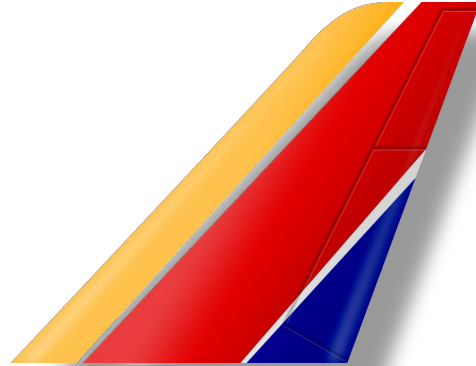
Current Airline Mix

Two global network carriers; two low-cost carriers; and two ultra low-cost carriers offering service to 16 non-stop destinations across the U.S. Avelo paused to focus on new business model.

Global Network



LCC



ULCC



230 One-Stop Destinations to the World



Source: Innovata Schedules, via Cirium.

Airport Economic Impact

- **On-Airport:**
 - \$770M economic impact
 - \$50M state and local taxes
 - \$1,100 per enplaned passenger
- **Off Airport/Adjacent Impact:**
 - 21,000 manufacturing jobs
 - \$2.3B in earnings
 - \$3.7B economic output
- **Tourism Impact:**
 - 2,280 jobs
 - \$95M in earnings
 - \$272M economic output
- **“Opportunity” Impact:**
 - \$500M annually lost to leakage
 - Opportunity to attract more travelers
- **Control the “controllables”**
 - Costs to carriers and tenants
 - Enhance the customer experience
 - Protect and improve valuable infrastructure
- **Relationships and infrastructure (one in the same)**

EXECUTIVE SUMMARY

Manchester-Boston Regional Airport serves New Hampshire and the greater Boston region and is poised for growth given North American trends. The impact report estimates employment, wages, and output from on-airport activities, including operations and construction. It also evaluates manufacturing and logistics jobs related to land use at MHT, tourism benefits, and broader fiscal impacts such as property and income taxes.

2024 BY THE NUMBERS



\$770M
total on-airport
economic impact



\$50M
economic activity
(state and local taxes)



\$1,100
total economic
impact per enplaned
passenger



1.28M
passengers flew
through MHT



\$272M
in total annual visitor
expenditures

TRAVEL+ LEISURE

MHT earned the top spot as the **#1 domestic airport in 2023** from Travel + Leisure Magazine, with additional top 10 rankings in 2019, 2022, and 2024.

OFF-AIRPORT ADJACENT ECONOMIC IMPACT

A measurement of the ripple effect of on-site economic activity, supporting growth in jobs, earnings, and outputs across New England.

Manufacturing employment is the largest share of adjacent economic activity with:



21,000 | **\$2.3B**
jobs | in earnings



\$3.7B
in economic output

TOURISM IMPACT

Total economic activity of visitors through MHT creates:



2,280 | **\$95M**
jobs | in earnings



\$272M
in economic output

EMPLOYMENT

A measurement of initial economic impact.

On-Airport Employment supports:



2,600 | **\$179M**
jobs | in earnings



\$411M
in economic output

On-Airport Construction generated:



300 | **\$19M**
jobs | in earnings



\$38M
in economic output

Total On-Airport Operating generated:



2,900 | **\$198M**
jobs | in earnings



\$449M
in economic output

Strategic Vision

- **Position MHT to be the *Best Small Hub Airport in the U.S.***
 - Airline Operating Agreement (July 1, 2026-June 30, 2030)
 - Airport Capital Improvement Plan (2026-2031)
 - Airport Master Plan Update (Q2 2027)
 - Rebranding Initiative (Q2 2027)
 - 100-Year Anniversary (Q2 2027)
- **Short term goals:**
 - Pursue new carriers and markets
 - Work toward 1M enplaned; 2M total passengers
 - International Cargo
 - Develop new corporate/general aviation facilities
 - Pursue business development opportunities to diversify revenues and reduce CPE
 - Develop the next generation of airport leaders



Futureproofing MHT

“Proactive process of designing, building or preparing systems, products, strategies, or personal skills, to be resilient, adaptable and relevant in anticipation of future changes, challenges, and technologies...”

- **Airport Capital Improvement Plan**

- \$97M in project costs
- \$MHT share (5%/\$4.8M)
- \$State share (5%/4.8M)

- **Airport Master Plan**

- \$2M; Centurion Planning and Design
- Blueprint for next 20 years of development

- **2026 Projects:**

- TWY G and D Reconstruction
 - \$3M; MJ/Continental \$2.8M
- TWY E Design (Construction 2026)
 - \$750K; MJ Design
- Airfield Electrical Vault
 - \$6M; Jacobs/Moulison Electric
- Airport Drainage Study
 - \$450K
 - AECOM





*Thank You, and
Happy Travels!*

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