



Dallas/Fort Worth International Airport The World Connected

Northeast Tarrant Transportation Summit
February 18, 2011



Agenda

- DFW Airport Overview
- DFW Airport and the Economy
- Air Service Development Opportunities and Challenges
- TRIP and Access Improvement

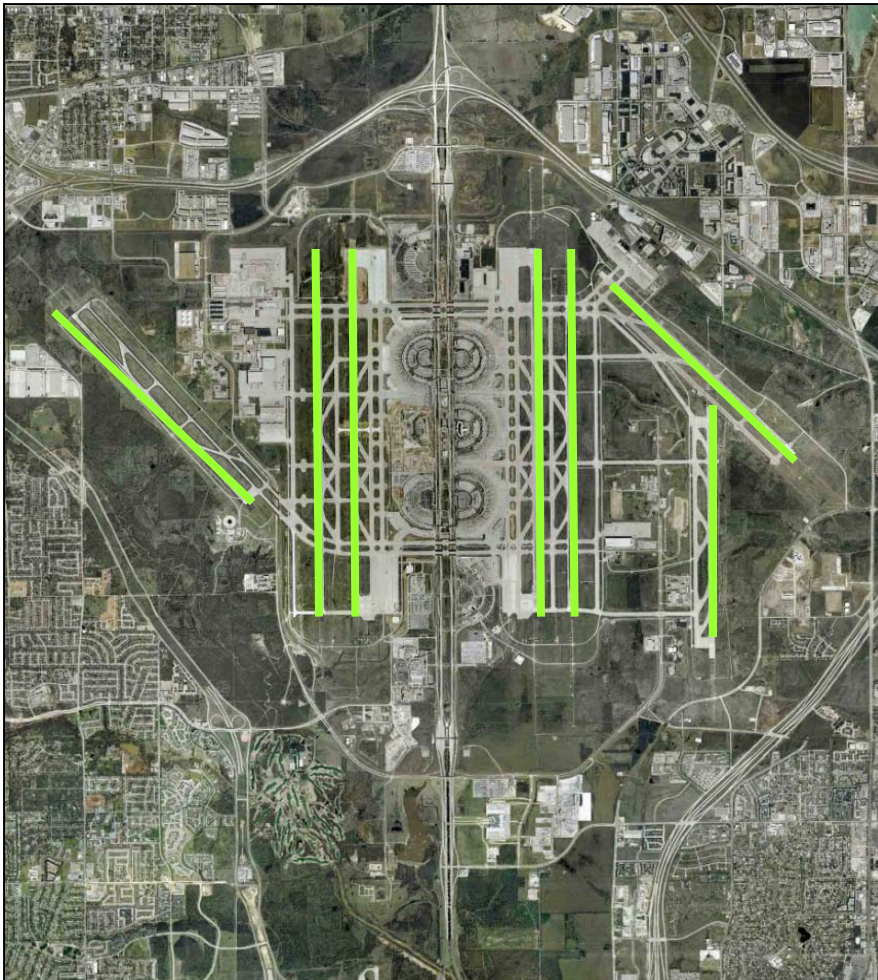


DFW Airport Overview



DFW Airport Overview

DFW Airport has seven runways and can accommodate simultaneously a combination of four takeoffs and landings.



- 24-hour Operations
- No Slot Constraints
- No Curfews
- 7 Runways
- 5 Terminals
- Any aircraft at maximum payload can land at DFW



DFW Airport Overview

Jointly owned by the cities of Dallas and Fort Worth, DFW has built a huge infrastructure and still has room to grow.



Source: FAA Airport

DFW Airport Overview

DFW is served by 19 passenger carriers and 13 cargo carriers.



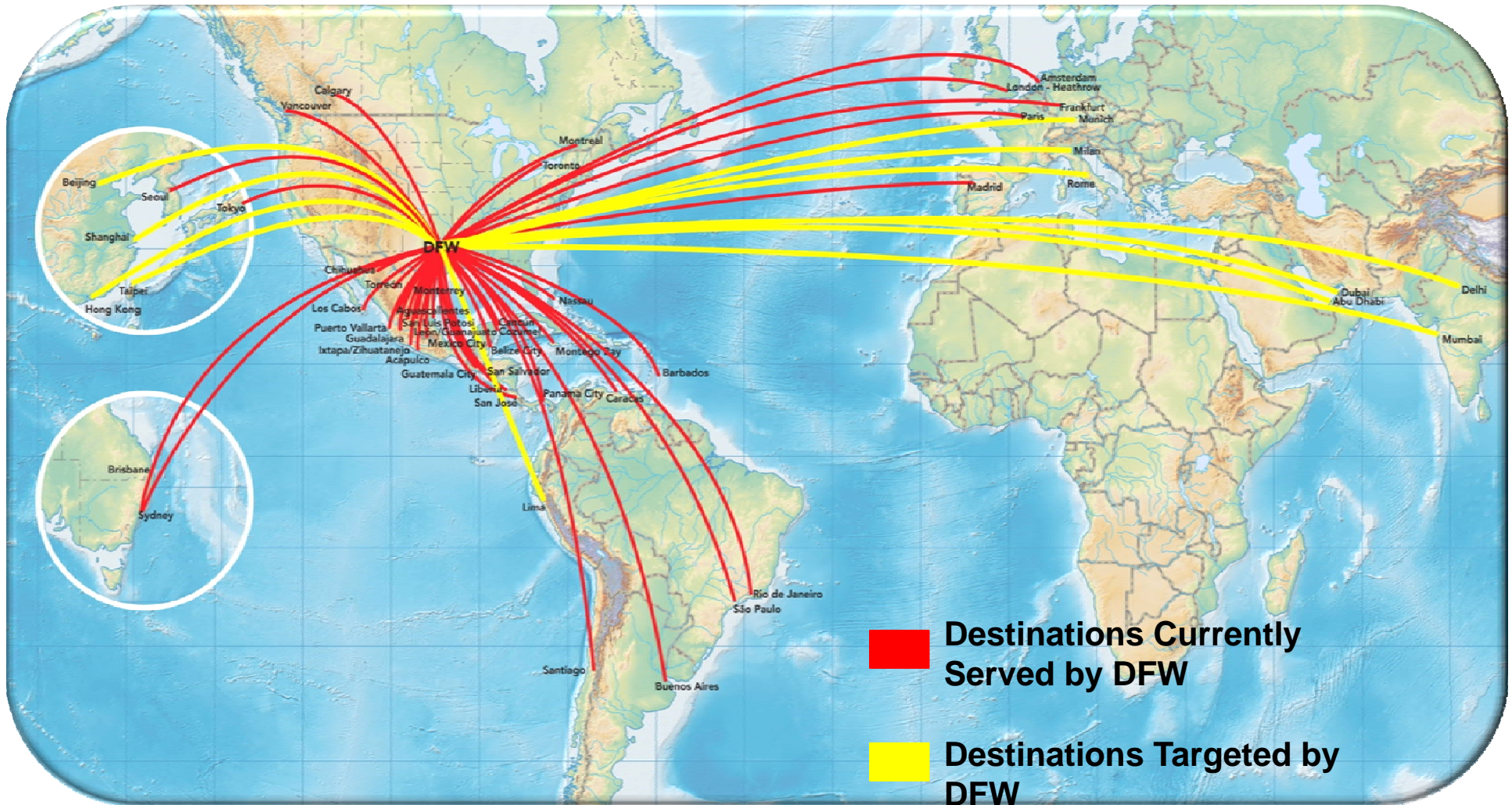
Note: Qantas and Spirit services begin May, 2011



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DFW Airport Overview

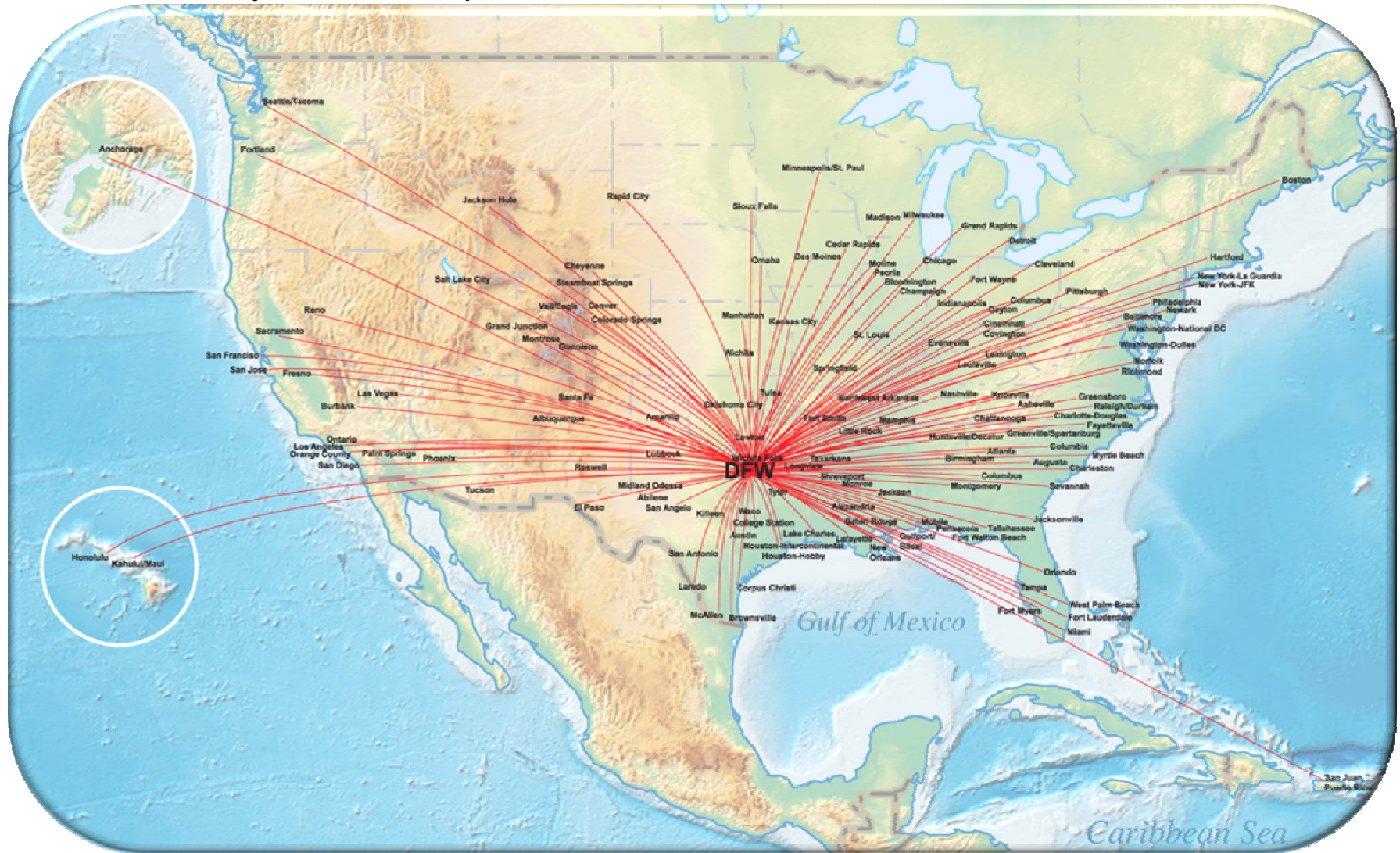
DFW currently has nonstop service to 44 international destinations.





DFW Airport Overview

DFW currently has nonstop service to 144 domestic destinations.



DFW Airport Overview

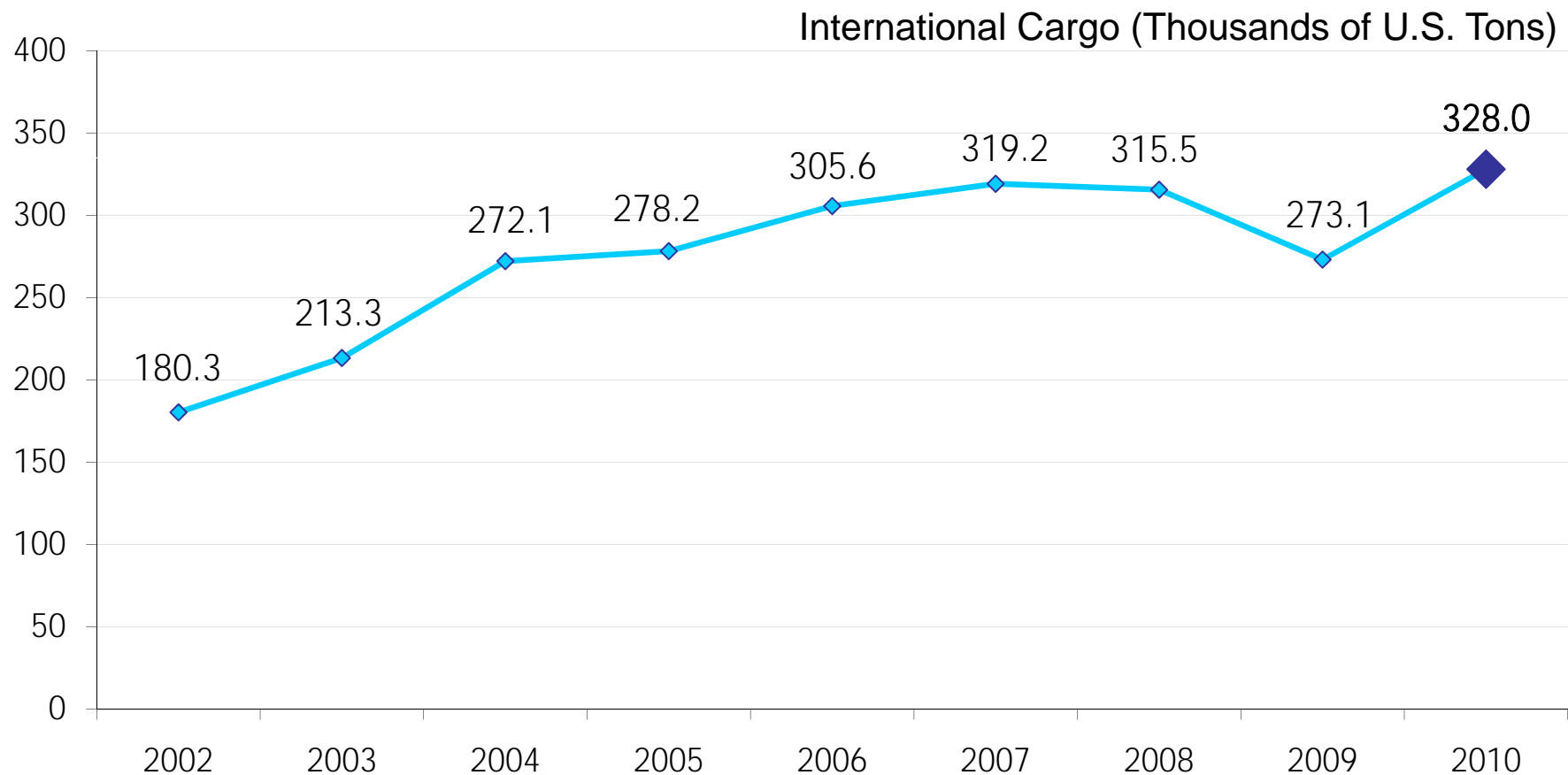
DFW's international cargo network serves 14 major cargo hubs around the world.





DFW Airport Overview

2010 was DFW's best year ever in terms of international cargo, handling over 328,000 tons.





DFW Airport and the Economy

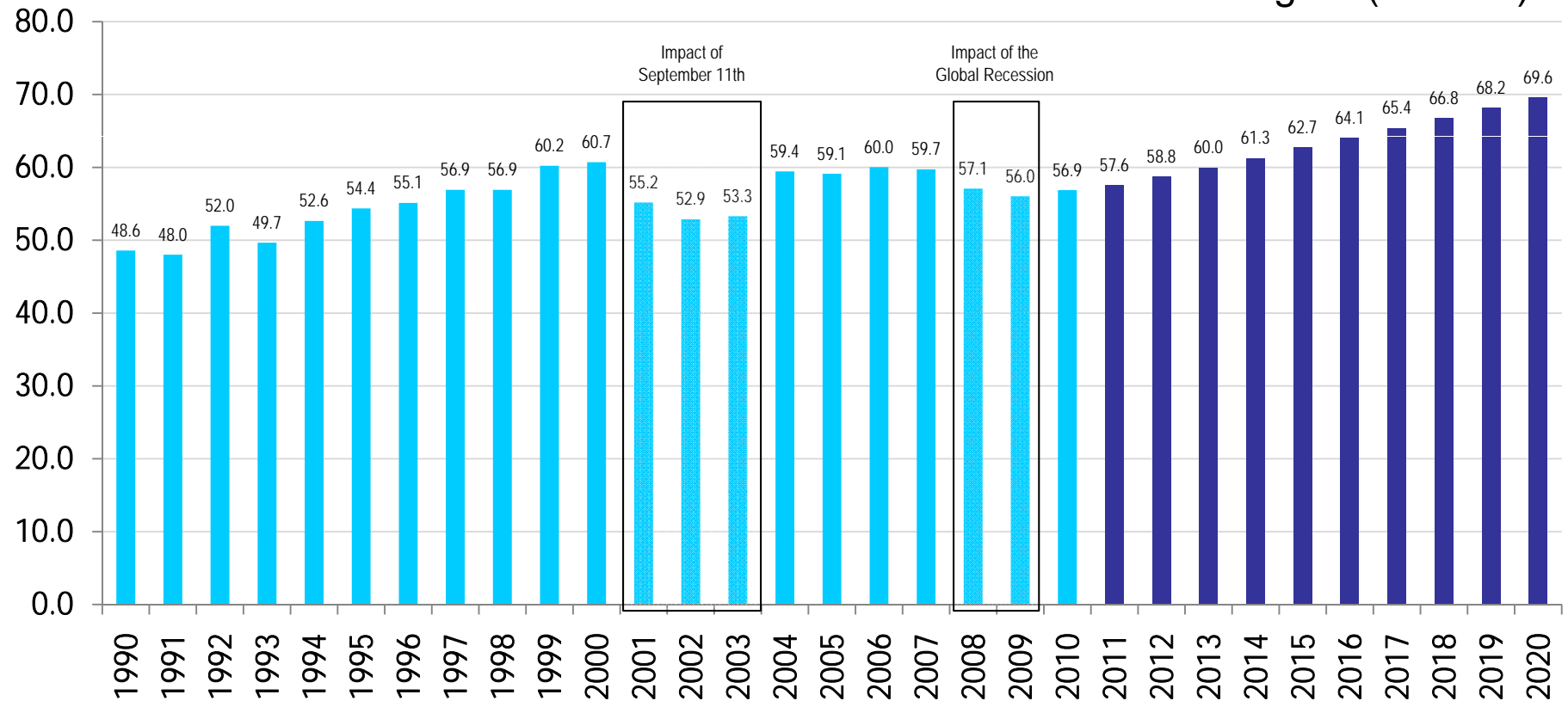




DFW Airport and the Economy

Passenger traffic at DFW has increased consistently since 1990, with only two periods of decline.

DFW Total Passengers (Millions)



Source: ASD

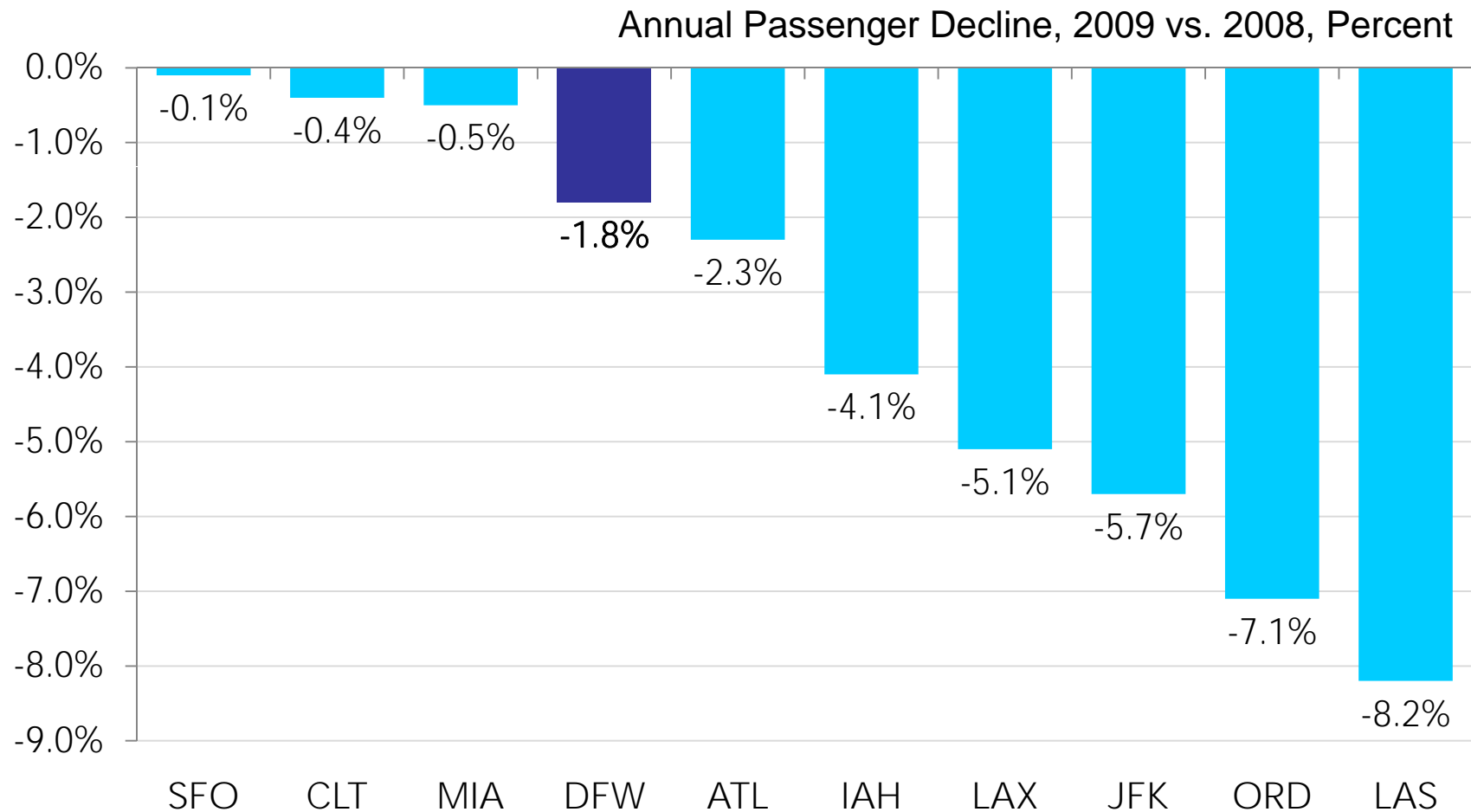
Note: Includes Mainline and Regional Carriers



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DFW Airport and the Economy

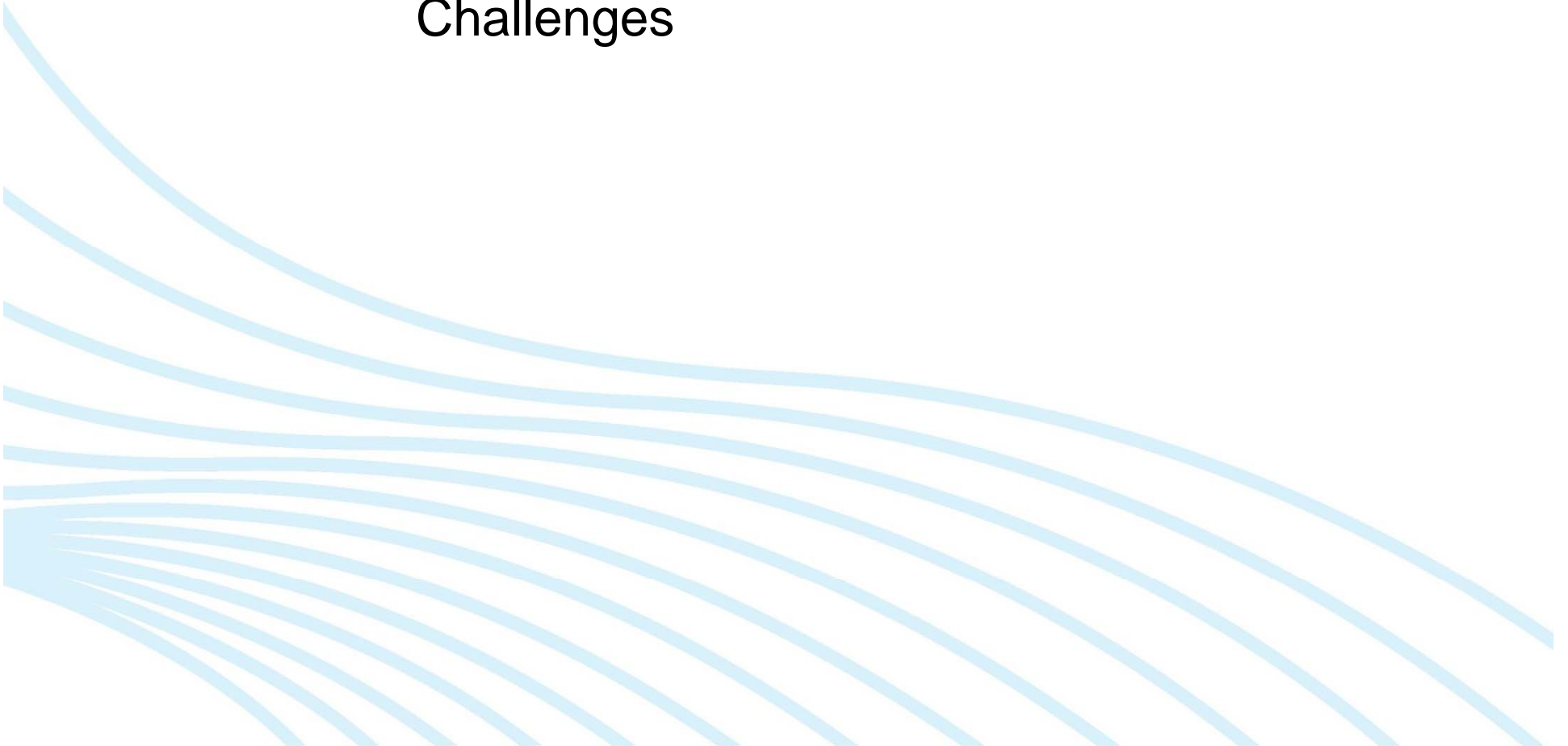
A very strong local originating market allowed DFW to outperform most of its domestic competitors during the recession.



Source: Airports Council International



Air Service Development Opportunities & Challenges



Air Service Development Opportunities & Challenges

Typically, the success of an airport's air service development efforts will be directly related to the following market and carrier variables

- Market Size
- Alliance and Hub Strength
- Carrier Investment
- Geography

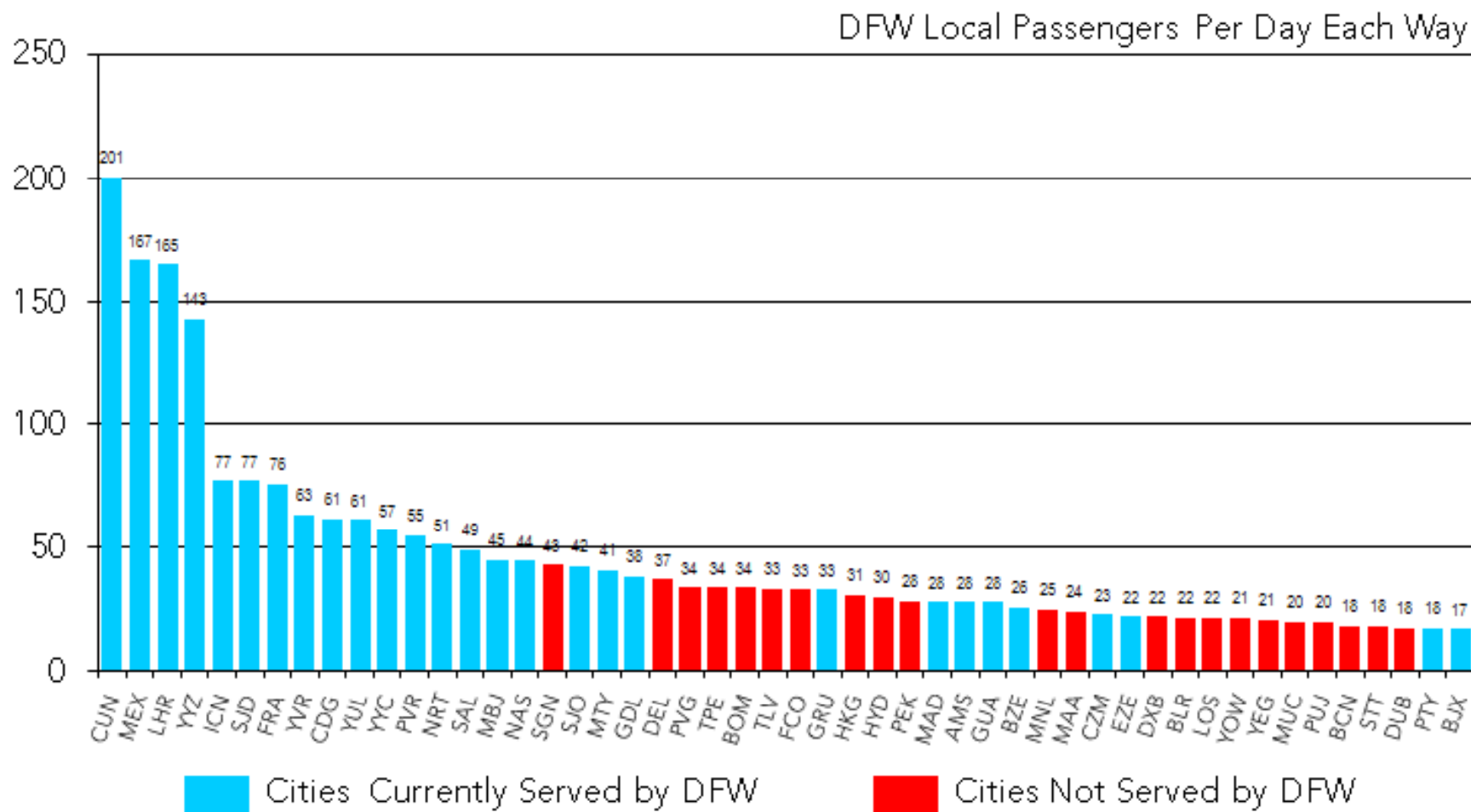




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Air Service Development Opportunities & Challenges

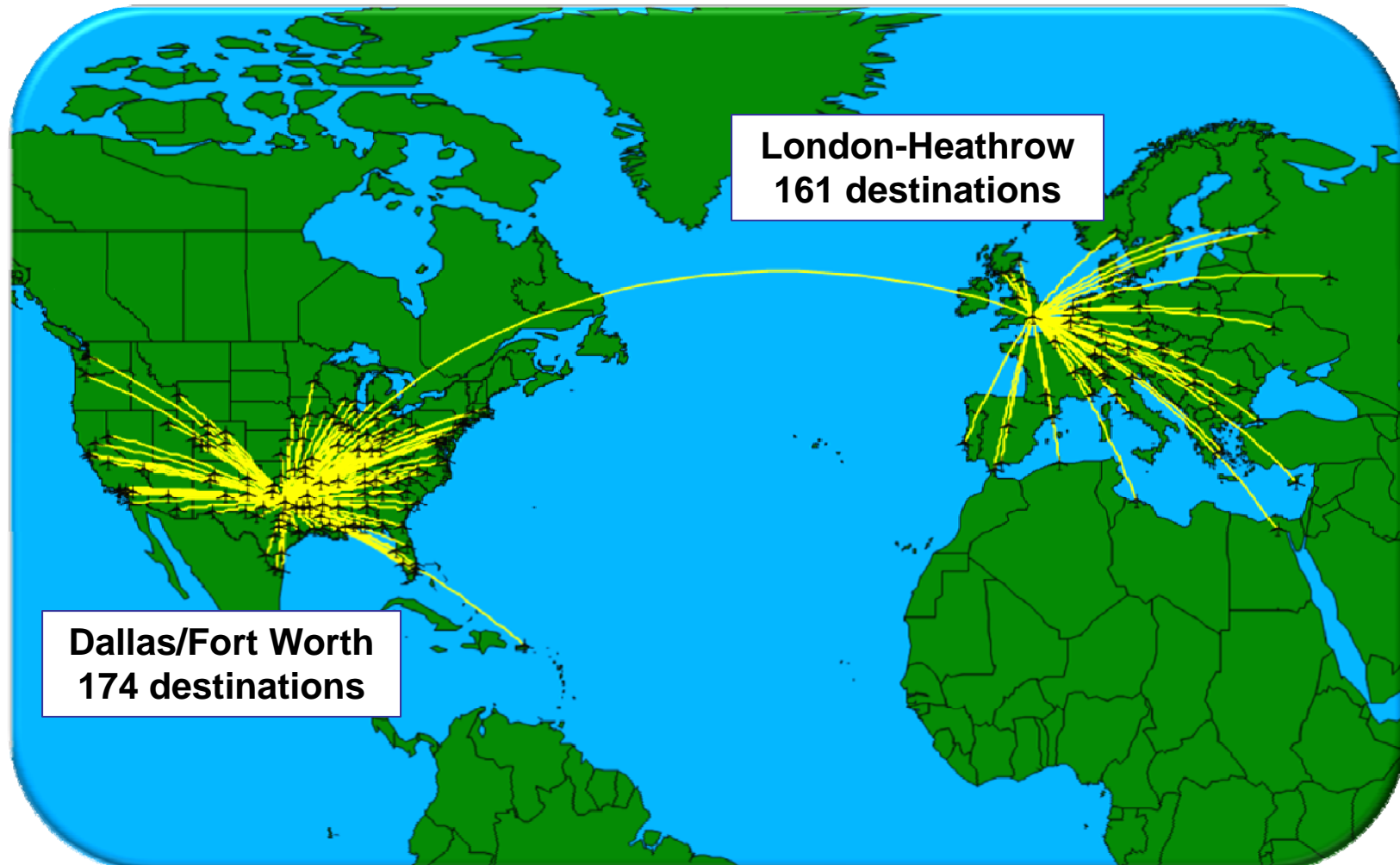
DFW currently has non stop service to 19 of its top 25 largest international markets.



Source: ADI Sabre, O&D Passengers October 2009 - September 2010

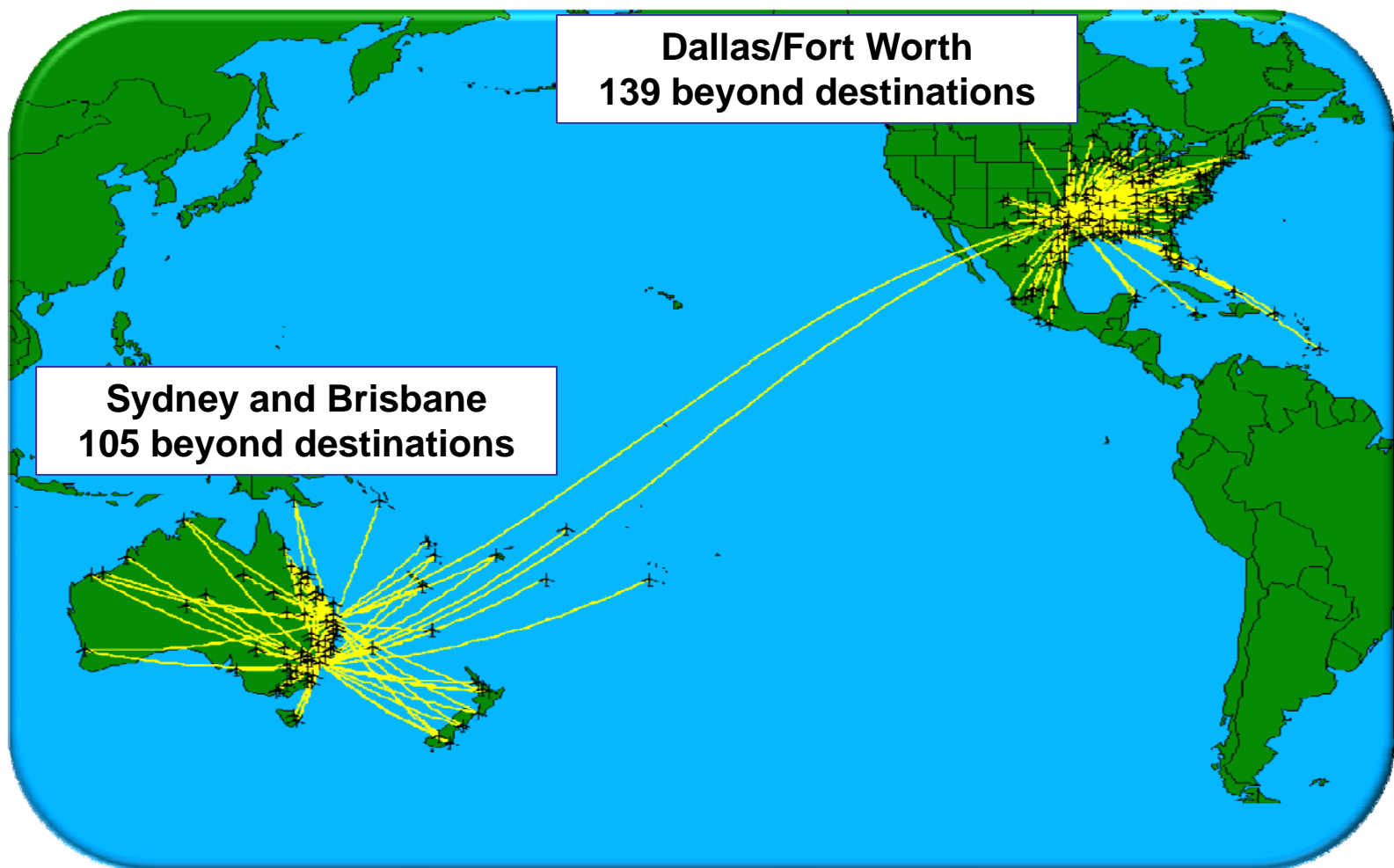
Air Service Development Opportunities & Challenges

An alliance hub to hub operation such as the DFW-London-Heathrow service builds over 28,000 individual alliance connections for AA and BA



Air Service Development Opportunities & Challenges

The new route served by Qantas offers passengers 139 connections beyond DFW and 105 connections beyond Sydney and Brisbane.



Air Service Development Opportunities & Challenges

Carriers considering long-haul service may need to invest over half a billion dollars in a market before they operate their first flight.



Air Service Development Opportunities & Challenges

One technological advancement that will help DFW to reach new markets in the future is the 787 aircraft.

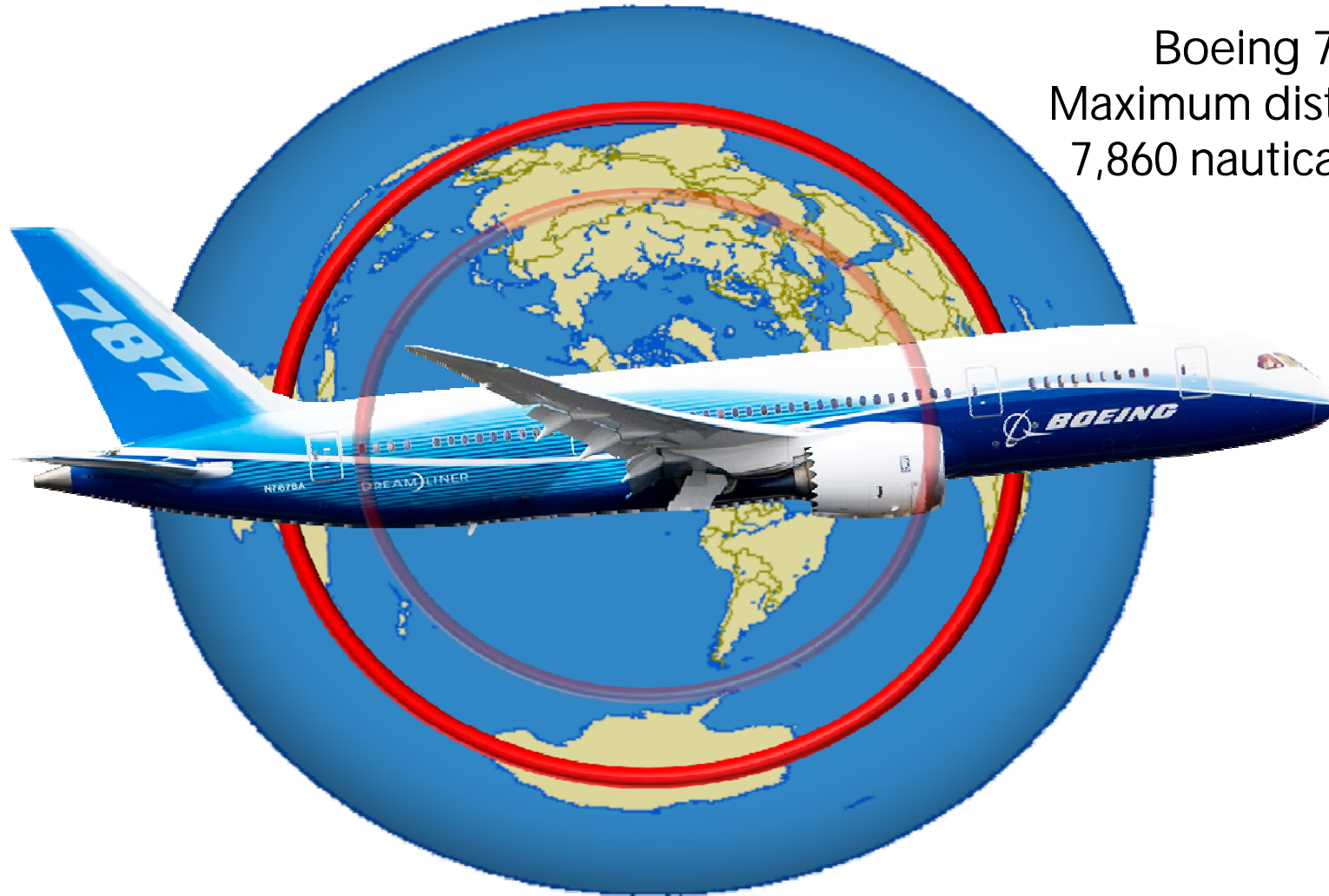


Boeing 767
Maximum distance of
5,645 nautical miles

Air Service Development Opportunities & Challenges

The range of the 787 aircraft allows an airline to fly nonstop from DFW to markets in Australia and China.

Boeing 787
Maximum distance of
7,860 nautical miles

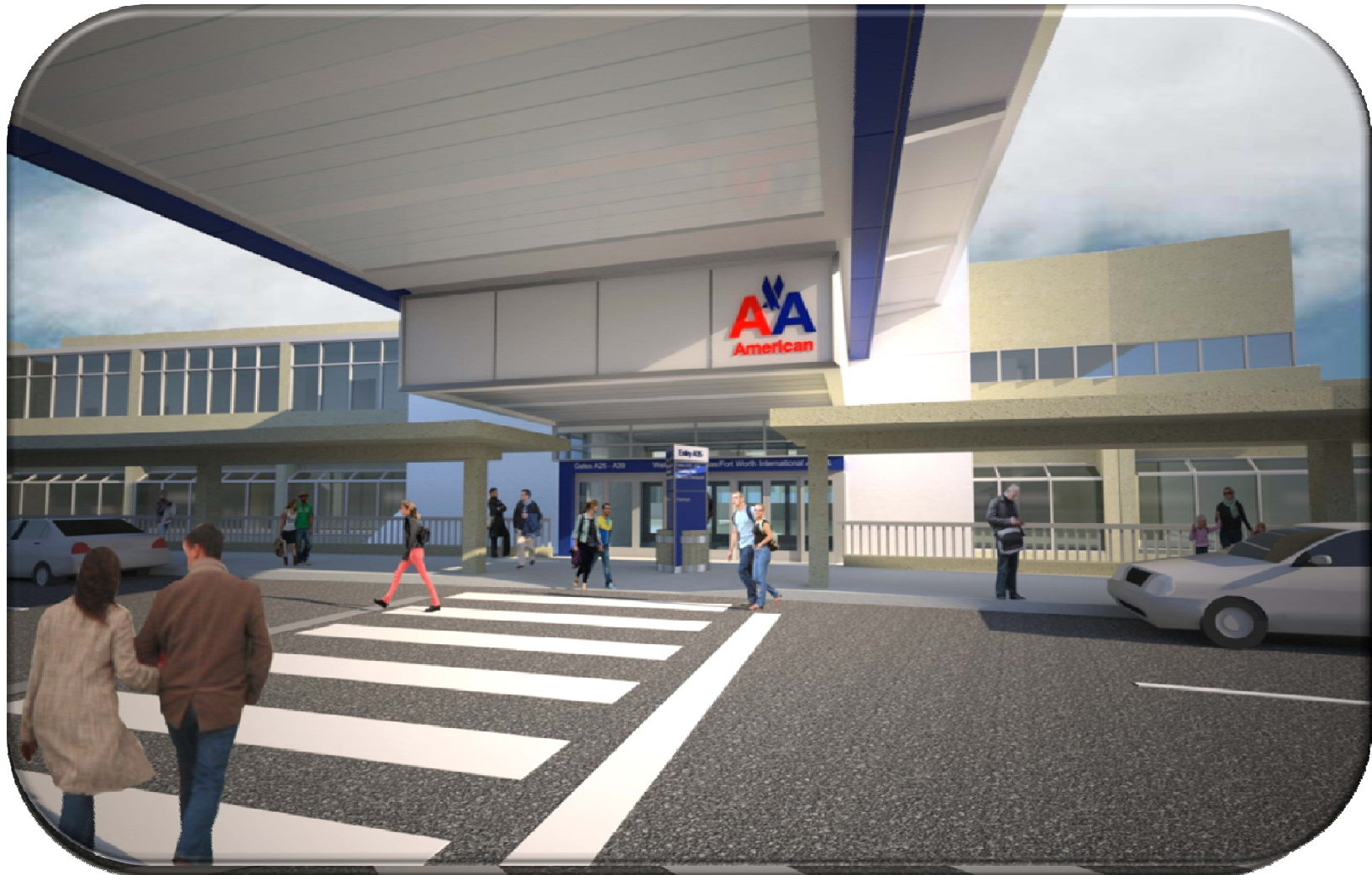


TRIP and Access Improvement



TRIP and Access Improvements

The Terminal Renewal and Improvement Program (TRIP) will begin February 2011 in Terminal A.



TRIP and Access Improvement

Updates include re-configured ticket counters to enhance self-service..



TRIP and Access Improvement

Security checkpoints will be reconfigured and expanded to improve operational efficiency.



TRIP and Access Improvement

Similar to Terminal D, all terminals' shops and restaurants will be grouped at key passenger circulation points, rather than spread throughout the terminals.



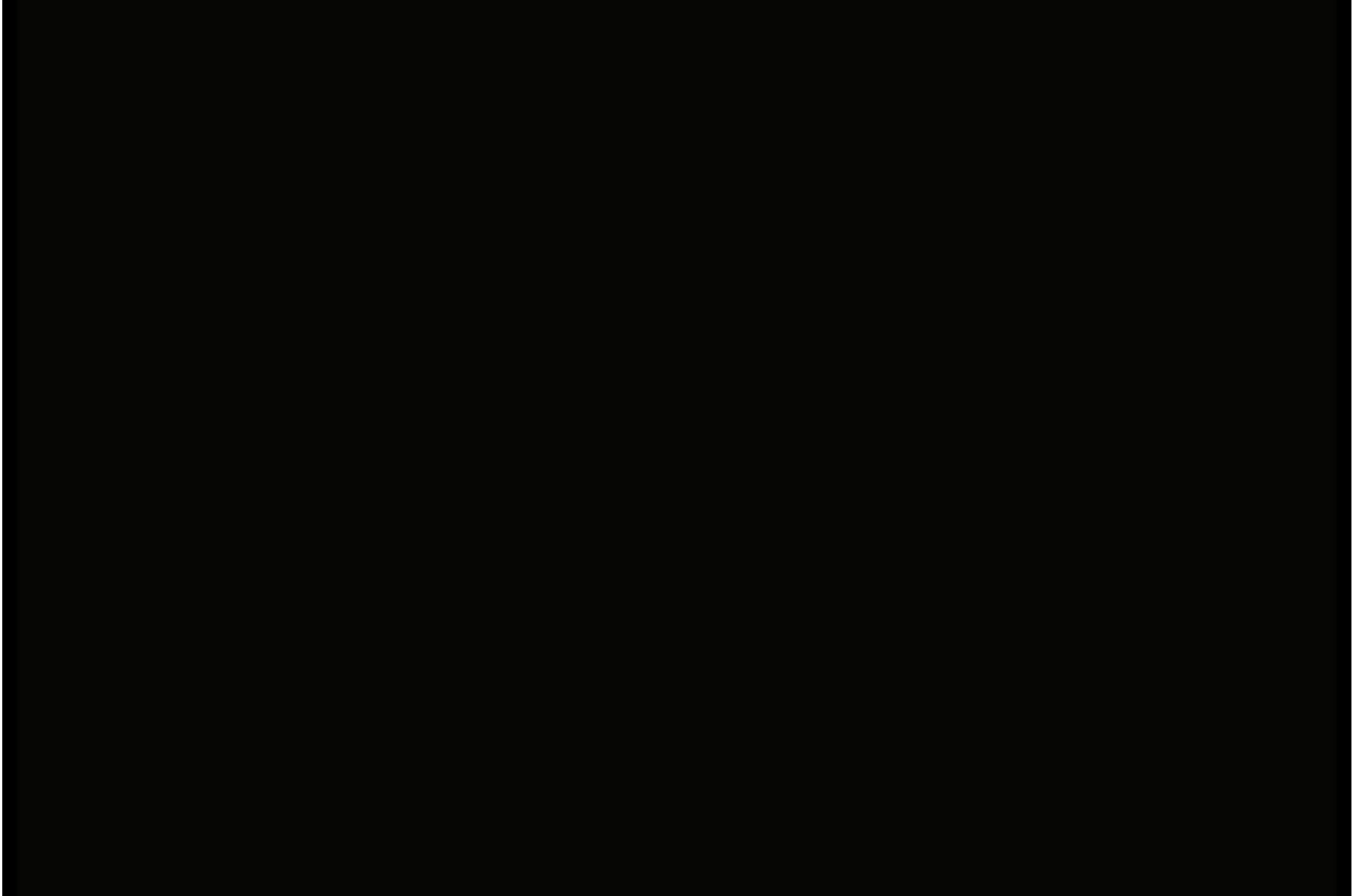
TRIP and Access Improvement

The Dallas/Fort Worth Connector Project began this year and is a construction project at the front door of DFW Airport.



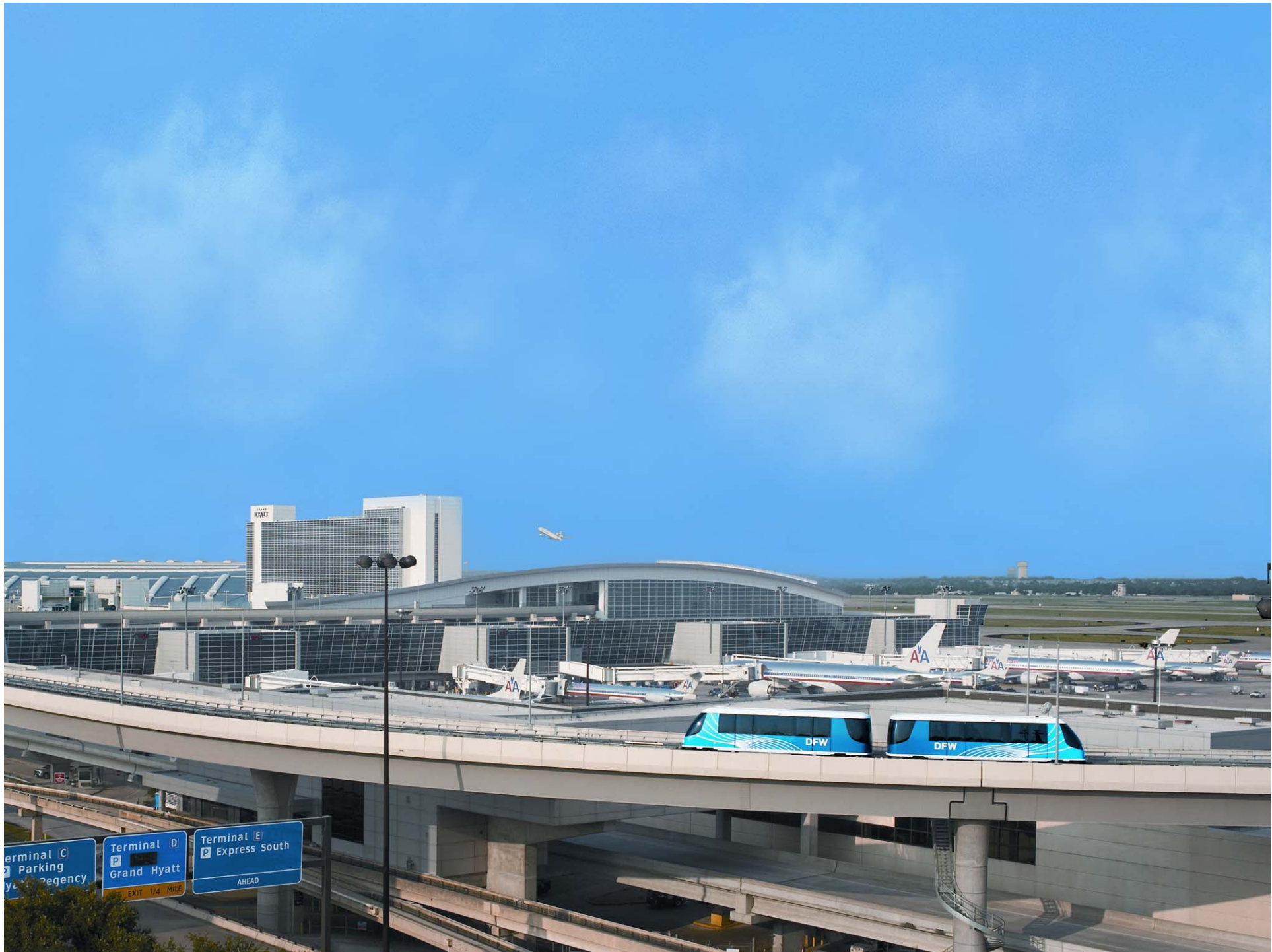


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DFW Airport R&R Program







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