The State of the Industry and The State of Things to Come

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Agenda

- DFW Airport Overview
- (re)defining our airport – DFW’s Terminal Renewal and Improvement Program (TRIP)
- Long-Term Concessions Planning
- Reaching Customers through Innovation
DFW Airport Overview
Terminal Renewal and Improvement Program (TRIP)
Terminal Renewal and Improvement Program (TRIP)
The $2 Billion Terminal Renewal and Improvement Program began February 2011 in Terminal A and will continue through 2017.
Terminal Renewal and Improvement Program
When complete, passengers will enjoy significant improvements in the DFW experience.

- Easy-to-locate, more visible shops and restaurants
- Expanded, reconfigured security checkpoints
- More self check-in options in ticketing areas
- Parking garage improvements
Long-Term Concessions Planning
Long-Term Concessions Planning
TRIP presented a unique opportunity for DFW to evaluate the current concessions situation and design a new, customer-centric, approach for future concessions selection.

- Conducted terminal-specific intercept survey’s to ensure selected concepts match passenger demographics.
Long-Term Concessions Planning
In addition to the intercept survey’s, DFW utilized industry data from consultants to determine customer preferred trends and, as a result, drive space planning decisions.
Long-Term Concessions Planning
The research allowed DFW to ensure selected concepts would match customer demographics, include an ideal mix of food & beverage, as well as retail, exceed customer expectations and deliver revenue results across the organization.
Long-Term Concessions Planning

DFW executed a targeted media and outreach plan to inform potential concessionaires of the upcoming opportunities.
Long-Term Concessions Planning
The first phase of TRIP in Terminal A is expected to be completed by October 2012. When the section reopens, we’ll have some new, exciting concessionaires in the space. Opening in Fall 2012…
Long-Term Concessions Planning
Opening in Fall 2013…
Long-Term Concessions Planning
Opening in Fall 2014…
Terminal A Concessions Program at Dallas/Fort Worth International Airport
Reaching Customers through Innovation
Reaching Customers through Innovation
DFW regularly intercepts passengers to determine which technologies are utilized. Currently, 84% of DFW passengers use a Smartphone with web capabilities.

* June '11 study. Sample size of 603 (+/- 4%).
Reaching Customers through Innovation
The use of location-based mobile applications in the United States is expected to grow, and companies are beginning to include it in their marketing plans.
Reaching Customers through Innovation

To capitalize on this technology trend, DFW launched a marketing program in August where concessionaires can take advantage of location-based mobile apps and encourage passengers to visit their locations.
Reaching Customers through Innovation

DFW passengers who check-in can redeem offers from 40 concessionaires at 85 different locations.
Reaching Customers through Innovation

To inform passengers of the campaign and offers available, promotional signage was placed throughout DFW’s terminals and concessionaires who opted to participate in the campaign were “outfitted” with signage and buttons.
Reaching Customers through Innovation
To date, the campaign has received nearly 6,500 total check-in’s and is continuing to see steady growth week over week.

Most popular offers to-date:

- Receive $1.00 off any pastry when you purchase a beverage.
- Free chips and salsa on every check-in.
- Take 15% off any combo meal.
- Two entrees for $20, also includes 1 chips & salsa to share. Beverages not included.
Reaching Customers through Innovation
DFW launched a digital sign pilot program in Terminal D last year with much success. Additional digital signs will roll out over the next 7 years as part of DFW’s Terminal Renewal and Improvement Program.
Reaching Customers through Innovation
DFW’s newly redesigned mobile website provides colorful displays of food and shopping opportunities.
Summary

- Nearly 60 million passengers travel through DFW Airport each year expecting a world-class customer experience.
- The Airport’s Terminal Renewal and Improvement Program will provide the opportunity for DFW to reconfigure it’s terminal to maximize concessionable lease space and exceed revenue plans by 2020.
- Long-term Concessions planning based on customer research will enable DFW to obtain the most customer-preferred brands for its terminals.
- DFW continues to remain innovative to not only meet, but exceed the expectations of our customers.
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