

# Denver International Airport Opportunities for Business



Presented to  
The DIA Way Small Business Opportunities Forum  
by Kim Day, Manager of Aviation  
August 31, 2009

# Presentation Outline

- An Overview of Airports
  - Key attributes of an airport
  - The unique nature of DIA
- Planning for the Future
  - Strategic Plan
  - Master Plan
  - State of the Industry
- Key Initiatives

# Airports are complex enterprises that present many opportunities for business

- Physical infrastructure
  - Terminal facilities
  - Runways
  - Tenant building requirements
- The Business of Airports
  - Concessions
  - Parking
  - Land Development
  - Airline operations

# Airports are long-term assets that drive the economy of the regions they serve

- Stapleton served the region for more than 70 years
  - DIA will celebrate it's 15<sup>th</sup> anniversary next February
- DIA is uniquely positioned in the industry with 53 square miles of land for future growth
- DIA contributes \$22.5B to the state's economy every year
- The Denver air travel market is very lucrative and large for a region of this size

# Current DIA Statistics

- DIA currently ranks as the fifth-busiest airport in North America and the ninth-busiest airport in the world
  - DIA has jumped ahead of Frankfurt (CYTD April 2009)
- DIA served **51.2 million passengers in 2008**
  - 2.8% increase over 2007
  - DIA set passenger records in 10 of the 12 months in 2008
  - *January – June 2009 – DIA passenger traffic down by 4.7%*
  - Over 625,000 aircraft movements in 2008
- Average day in peak month (July)
  - 161,000 passengers
  - 870 passenger flight departures
  - 1,825 total takeoffs and landings  
(including general aviation and cargo)

# Serving over 50 million passengers annually, Denver ranks as one of the busiest airports in the world

## World Rankings CY 2008

Rank	Airport	CY 2008 Passengers
1	Atlanta	90,039,280
2	Chicago O'Hare	69,353,654
3	London/Heathrow	67,056,228
4	Tokyo/Haneda	66,735,587
5	Paris/DeGaulle	60,851,998
6	Los Angeles	59,542,151
7	Dallas/Ft. Worth	57,069,331
8	Beijing	55,662,256
9	Frankfurt	53,467,450
<b>10</b>	<b>Denver</b>	<b>51,245,334</b>
11	Madrid	50,823,105
12	Hong Kong	47,898,000
13	New York/JFK	47,790,485
14	Amsterdam	47,429,741
15	Las Vegas	44,074,707

## U.S. Rankings CY 2008

Rank	Airport	CY 2008 Passengers
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2	Chicago O'Hare	69,353,654
3	Los Angeles	59,542,151
4	Dallas/Fort Worth	57,069,331
<b>5</b>	<b>Denver</b>	<b>51,245,334</b>
6	New York/JFK	47,790,485
7	Las Vegas	44,074,707
8	Houston/Intercontinental	41,698,832
9	Phoenix	39,890,896
10	San Francisco	37,405,467
11	Orlando	35,622,252
12	Newark	35,299,719
13	Detroit	35,144,841
14	Charlotte	34,732,584
15	Miami	34,063,531

Source: Airports Council International

# 16 passenger airlines at DIA provide over 1,700 daily flights to over 150 destinations worldwide

## Destinations Served Nonstop from Denver International Airport

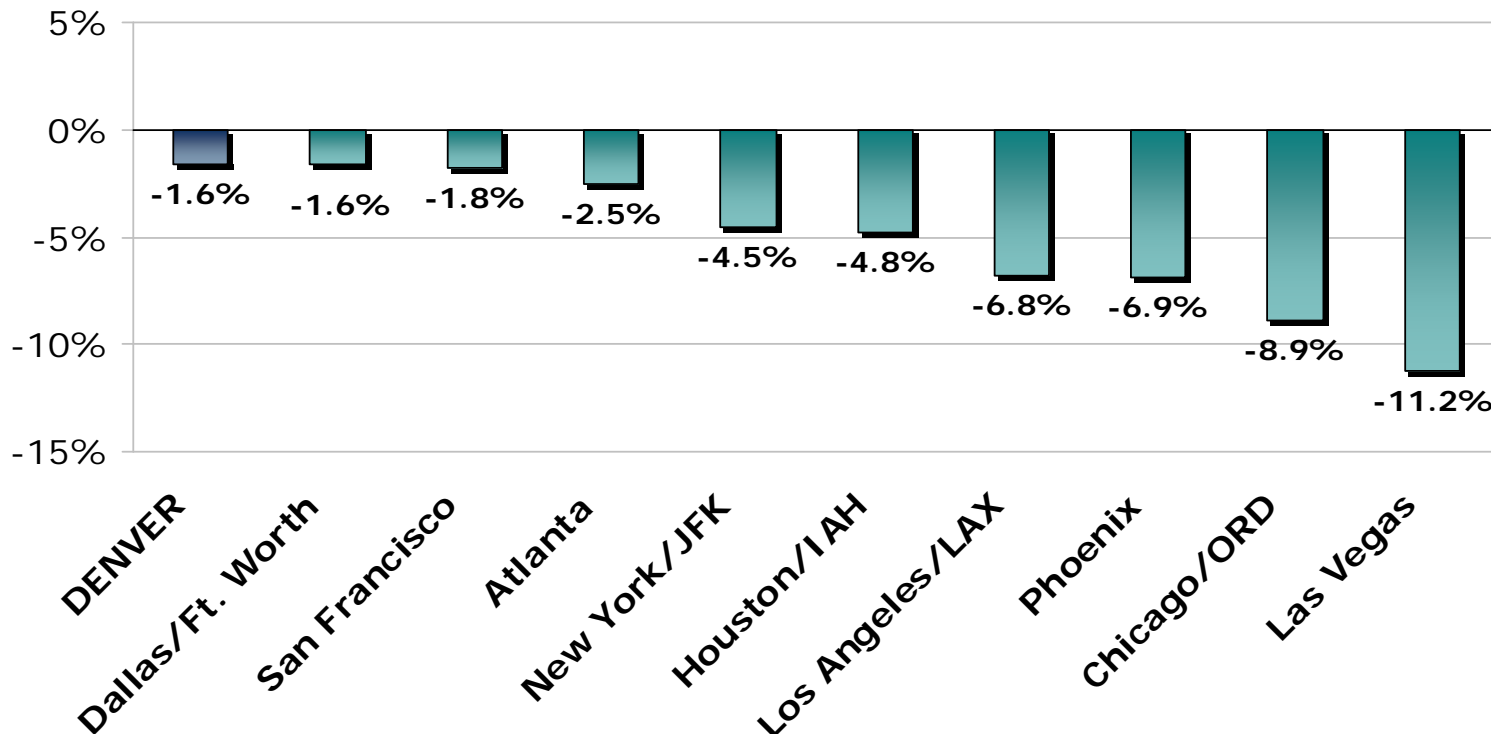
August 2009



Source: Official Airline Guide (OAG) Schedule Tapes; some markets served seasonally

# Denver's capacity is faring well compared to other major U.S. airports

**Percent Change in Seat Departures**  
*CY 2009 compared to CY 2008, all airlines*



Source: Official Airline Guide (OAG) Schedule Tapes



# Numerous elements affect the health of the aviation industry, including airports



# Aviation is a dynamic industry... and recent changes will affect Denver

- A bid by Republic Airways Holdings, Inc. (RAH) for Frontier was chosen by the bankruptcy court in mid-August
  - In addition to Frontier and Lynx, RAH owns four airlines
    - Midwest (based in Milwaukee)
    - Express/regional carriers that do not fly under their own tail: Chautauqua Airlines, Republic Airlines & Shuttle America
    - Republic also holds an 89% ownership stake in Mokulele Airlines (Mokulele operates in Hawaii)
- Continental Airlines will join the Star Alliance in late October 2009
  - Continental has already been granted antitrust immunity with United, Air Canada and Lufthansa for transatlantic flights

To keep DIA competitive, we have developed a strategic plan for the future

Our Vision

**TOGETHER WE SOAR**

Strategic Priorities

- Excelling In Airport Management
- Providing Unparalleled, Inspiring Service
- Taking Environmental Stewardship To New Heights
- Delivering Via High Performance Teams
- Enhancing Our Competitive Advantage

# Traditional roles of an airport

## Old Thinking

- Efficient, safe operations
- Security
- Parking
- Basic concessions

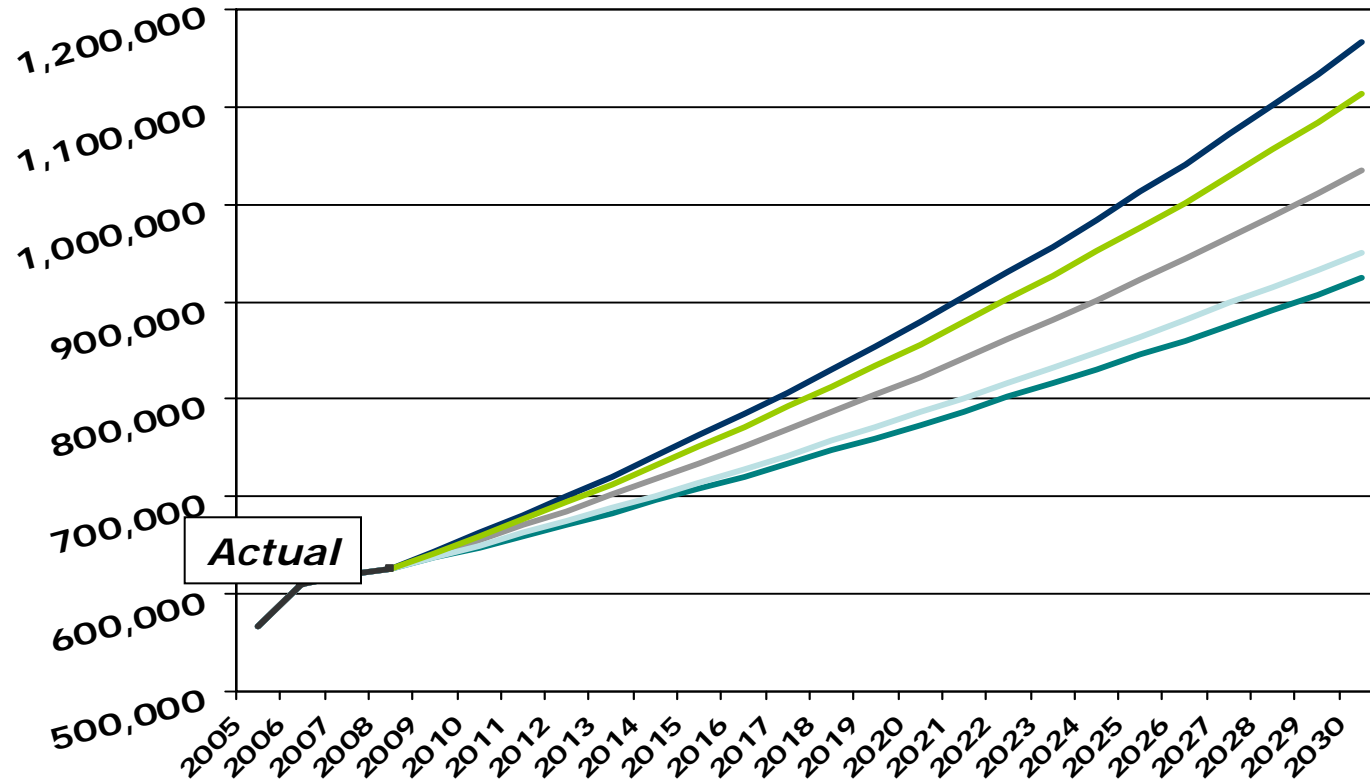
## New Thinking

All of the old *plus*

- Dynamic retail options
- Aesthetically pleasing spaces
- Unique customer experiences

# 2030 Forecast – *commercial operations*

**Airport Activity Forecasts – Commercial Operations**  
*YE 2005-2008, Forecast 2009-2030*



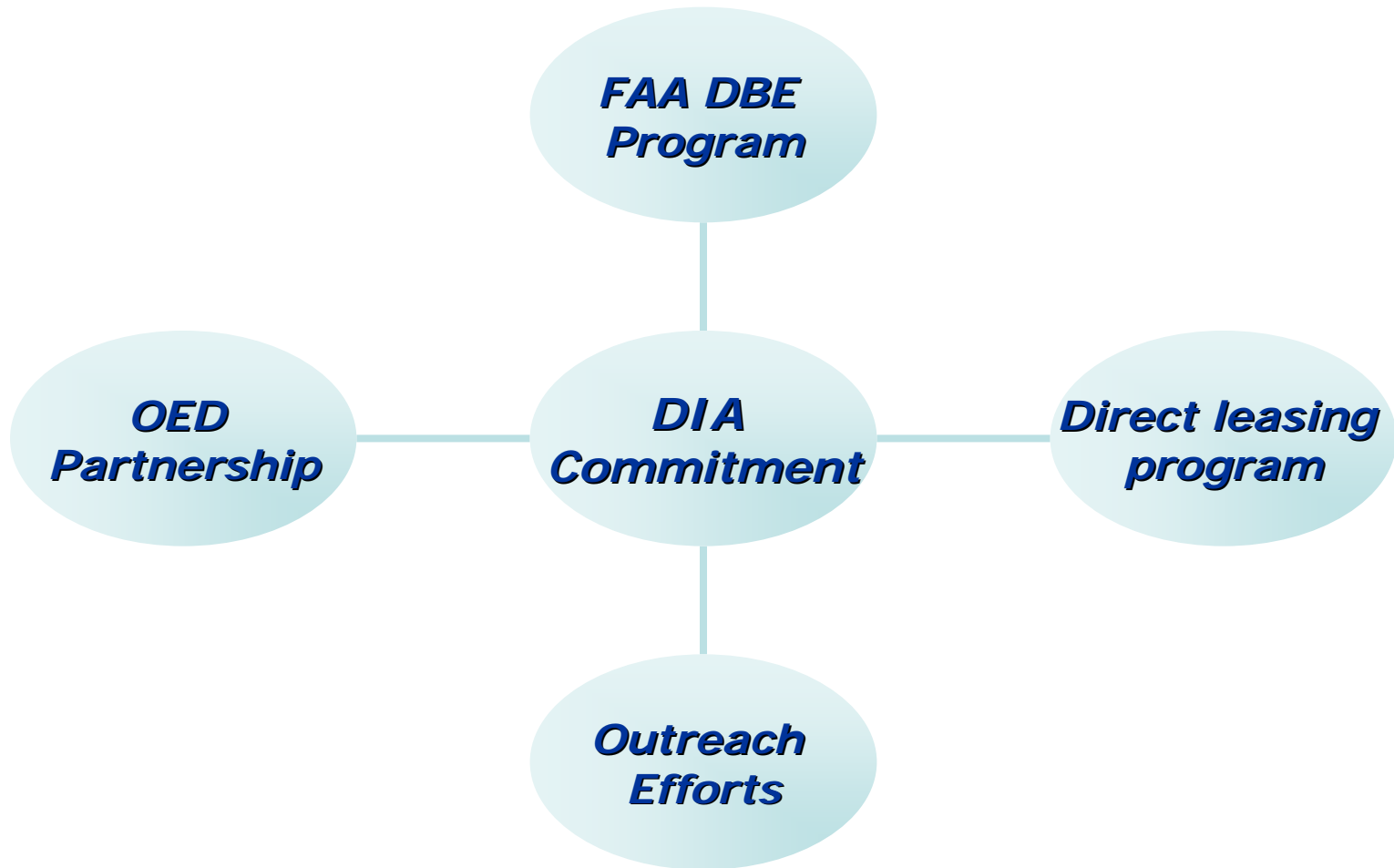
# DIA's short-term anticipated needs

- Short-term (2009 – 2015/2020)
  - One additional runway (7 total)
  - Concourse expansion – 20+ new gates (total) on A, B & C
  - International passenger processing and gates
  - Passenger train expansion
  - Baggage system improvements
  - Expansion of passenger security screening
  - FasTracks rail station
  - On-airport hotel
  - Parking and rental car expansion

# DIA's long-term anticipated needs

- Long-term (2015 – 2030/2035)
  - Additional runways (9 or 10 total)
  - 100+ additional gates
  - Concourse D (2020 – 2025)
  - Concourse E (2030/2035)
  - Significant international passenger processing expansion
  - Expansion of passenger security screening
  - Taxiway improvements
  - More deicing positions
  - Potential for doubling of rental car space
  - Fourth lane on Peña Boulevard
  - Public and employee parking expansion (near doubling)

# DIA's commitment to small business





# DIA will continue to play a strong role in the global aviation system



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