Welcome to the Master Plan Public Meeting
What is a Master Plan?

Decision-making tool to guide development of the Airport.

- Management and operating policies
- Construction of new and expanded facilities
- Reserve areas for future airport development

Needs to consider:

- Safety and security
- Maintain practical costs
- Customer service and satisfaction
- Maintain land uses that allows for logical incremental development
Why prepare a Master Plan?

To provide an overall framework needed to guide orderly and strategic development of DIA.

- Meet future needs
  - Additional capacity
  - Changing travel needs and characteristics

- Address anticipated changes in the industry
  - New technologies
  - Changing aircraft fleets
  - Security requirements
  - Environmental priorities
  - Energy (fuel sources/prices)
  - Economic changes
  - Operational changes
  - Regulatory changes

- Promote cohesive and integrated development in the airport environs
  - Support and maximize economic contribution to region and state
  - Foster compatible development
How did we get here?

The opening of DIA has led to strong passenger traffic growth.

Annual Passenger Traffic at Denver International Airport

- **STAPLETON INTERNATIONAL AIRPORT**
- **DENVER INTERNATIONAL AIRPORT**

**Base Forecast**

**1980**

**1985**

**1990**

**1995**

**2000**

**2005**

**2010**

**2015**

**2020**

**2025**

**2030**

**2001**

**Economic recession and attacks of September 11th**

**September 2003**

Opening of sixth runway, Runway 16R/34L – the 16,000-foot runway is the longest commercial runway in North America

**February 28, 1995**

Airport Opening

**50-Millionth Passenger**

**40-Millionth Passenger**

**30-Millionth Passenger**

**May 1989**

Denver approves referendum to build Denver International Airport

**1986**

Original Frontier Airlines ceases operations

**April 1988**

Intergovernmental Agreement signed by Adams County and the City and County of Denver

**May 1988**

Adams County annexation election agrees to annexation of land for Airport to the City and County of Denver

**1994**

Continental Airlines announces dismantling of Denver hub and the new Frontier Airlines launches

**2006**

Southwest Airlines launches service from Denver

**1989**

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**1985**

Congestion at Stapleton Airport leads to an expansion study for the existing airport and a site selection study for a new airport

**1980**

Early 1970s/1980s

Congestion at Stapleton Airport leads to an expansion study for the existing airport and a site selection study for a new airport

**FAA Approval / Groundbreaking**

**May 1989**

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**Original Design Capacity – 50 Million Passengers**
How is DIA doing?

Feature | Summary
--- | ---
Passenger Traffic | Fifth-busiest airport in North America and one of the highest growth rates of major airports in past five years
Resiliency | Airline capacity has remained strong compared to other large airports in challenging economic climate
Airline Costs | Airline costs have been reduced by 31 percent over last seven years

Annual Passenger Traffic - US Rankings
Calendar Year 2008

<table>
<thead>
<tr>
<th>Rank</th>
<th>Airport</th>
<th>2008 Passengers</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Atlanta</td>
<td>95,035,280</td>
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<tr>
<td>2</td>
<td>Chicago O’Hare</td>
<td>69,353,654</td>
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<tr>
<td>3</td>
<td>Los Angeles</td>
<td>59,542,151</td>
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<tr>
<td>4</td>
<td>Dallas/Ft. Worth</td>
<td>57,069,331</td>
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<tr>
<td>5</td>
<td>Denver</td>
<td>51,249,334</td>
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<tr>
<td>6</td>
<td>New York JFK</td>
<td>47,799,485</td>
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<td>7</td>
<td>Las Vegas</td>
<td>44,976,707</td>
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<td>8</td>
<td>Houston/Bush</td>
<td>41,698,832</td>
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<td>9</td>
<td>Phoenix</td>
<td>39,898,896</td>
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<td>10</td>
<td>San Francisco</td>
<td>37,234,592</td>
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<td>11</td>
<td>Orlando</td>
<td>35,622,252</td>
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<td>12</td>
<td>Newark</td>
<td>35,299,379</td>
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<tr>
<td>13</td>
<td>Detroit</td>
<td>35,144,841</td>
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<tr>
<td>14</td>
<td>Charlotte</td>
<td>34,732,584</td>
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<tr>
<td>15</td>
<td>Miami</td>
<td>34,043,531</td>
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Percent Change in Scheduled Seat Departures
January - June 2008 vs. January - June 2009

DIA Cost per Enplaned Passenger

Sources: Airports Council International; OAG Schedule Tapes; and Denver International Airport Financial Statistics
How is DIA doing?

<table>
<thead>
<tr>
<th>Feature</th>
<th>Summary</th>
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<tbody>
<tr>
<td>Domestic Destinations</td>
<td>Increase in nonstop destinations</td>
</tr>
<tr>
<td>International Destinations</td>
<td>Nonstop service to London and Frankfurt and multiple destinations in Canada, Mexico, and Costa Rica</td>
</tr>
<tr>
<td>Cargo</td>
<td>Cargo tonnage has decreased by 50 percent over last eight years</td>
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<tr>
<td>Noise</td>
<td>No noise violations in 2008</td>
</tr>
<tr>
<td>Regional Economy</td>
<td>$22.3 billion per year in employee salaries and related economic activity</td>
</tr>
<tr>
<td>Environmental Focus</td>
<td>Industry leader for environmental stewardship</td>
</tr>
</tbody>
</table>

Destinations Served Nonstop from Denver International Airport

Total Annual Aircraft Operations
What is the Master Plan process?

The master plan will be completed in the 1st quarter of 2010.
### How are the forecasts developed?

#### Step 1
Forecast base activity in 2030 using FAA, airline, historic and socioeconomic data.

#### Step 2
Developed a range of potential future scenarios.

#### Step 3
Evaluate the implications of airport operations and passenger activity under different scenarios.

#### Step 4
Project passenger, aircraft, and cargo activity in 2030 for each forecast scenario.

<table>
<thead>
<tr>
<th>Forecast Scenario</th>
<th>Growth (2008 to 2030)</th>
<th>Implications</th>
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<tbody>
<tr>
<td><strong>Base Forecast</strong></td>
<td>+ 84% + 77%</td>
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<tr>
<td><strong>Scenario 1:</strong></td>
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<tr>
<td>High Growth</td>
<td>+ 108% + 98%</td>
<td>Increased demand for all facilities</td>
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<td><strong>Scenario 2:</strong></td>
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</tbody>
</table>
| Decrease in hubbing/connecting activity | + 64% + 60% | More landside support (car rental, hotel, parking)  
| | | More terminal support (security checkpoints, ticketing)  
| | | Reduced airfield operations  
| | | Reduced gate demands |
| **Scenario 3:**  |                        |              |
| An evolution to larger aircraft fleet | + 84% + 64% | Requires fewer gates but more concourse frontage  
| | | Fewer aircraft operations  
| | | Airfield enhancements |
| **Scenario 4:**  |                        |              |
| Robust international growth as Denver evolves into an international gateway | + 103% + 90% | Larger aircraft  
| | | International arrival facilities |
| | | Higher connection percentage |

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Forecast of activity received FAA approval in 2007. The long-term activity growth trends serve as the basis for long range airport development planning and factors may influence actual activity growth (e.g. such as current economic conditions).
What is forecasted between now and 2030?

Significant future growth is anticipated at DIA.

**Commercial Passengers**

Activity Forecast

- Scenarios - Commercial Passengers

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<td>Base Forecast (2006-2015)</td>
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**Scheduled Aircraft Activity**

Activity Forecast

- Scenarios - Commercial Operations (Takeoffs & Landings)

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**Cargo Volume Forecasts**

- Historic Tonnage
- Forecast Tonnage

**Other Aircraft Activity**

- Cargo Existing
- Cargo Forecast
- General Aviation Existing
- General Aviation Forecast
- Other Air Taxi Existing
- Other Air Taxi Forecast
- Military Existing
- Military Forecast

Master plan activity forecasts guide a range of facility needs over a 25-year planning horizon. Actual development decisions will be based on achieving projected activity triggers rather than specific calendar milestones.
What are the airfield needs?

One runway by 2015 and two to three more by 2030.

Aircraft Delay Curve
Existing Airfield (Base Forecast)

Runway Requirements

Evaluation Criteria
- Meets 2030 requirements
- Airfield operational efficiency
- Length of additional taxiway development
- Impacts to existing facilities
What are the terminal needs?

In the short term (2015), expansion of the existing facilities.

- 20 additional gates
- International passenger processing and gates
- Passenger train expansion
- Baggage system upgrades
- Expansion of passenger security screening
- FasTracks rail station
- On-site hotel accommodations
What are the terminal needs?

In the long term (2030), creation of new facilities.

- Approximately 100 additional gates
- Significant international passenger processing expansion
- Terminal expansion equivalent to two or three additional modules (existing terminal consists of three modules)
- Passenger train and baggage system expansions
What are the concepts for terminal expansion?

**Current Terminal/Concourses**

**Future Terminal & Concourse Expansion (2030)**

**Future Terminal & Concourse Expansion (Beyond 2030)**

**Evaluation Criteria**
- Meets 2030 requirements
- Flexibility to meet demands beyond 2030
- Passenger convenience
- Meets security requirements

**Existing Template Expansion Concept**

**East/West Terminal and Concourse Concept**

**South Terminal Concept**
What are the landside needs?

Expansion of all facilities over the planning horizon.
- Roadways
- Parking
- Rental Car
- Terminal Curbside
- Commercial Vehicle Facilities

Rental Car Facility Requirements

Employee Parking Requirements

Public Parking Requirements
What are the concepts for landside expansion?

Evaluation Criteria

- Ability to accommodate 2030 demands
- Location of facilities
- Efficient land utilization
What are the support facility needs?

Expansion of most facilities required over the planning horizon.

Support Facilities Requirements

Evaluation Criteria
- Meets 2030 requirements
- Regional access
- Proximity to associated facilities
- Utilities/other infrastructure
- Expandability
What are the next steps?

Public and Stakeholder Outreach

- Additional advisory committee meetings
- Second public meeting on preferred development plan (mid-summer 2009)
- FAA review and approval of airport layout plan (early 2010)
How can you provide input?

Input from the public is encouraged and welcomed.

- Fill out a comment card
- Visit www.flydenver.com/masterplan
- Email masterplan@flydenver.com