

Moving Forward.
Growing Together.

DFW IN MOTION

CONCESSIONAIRE WEBINAR

OCTOBER 2026

DFW

01 **Setting DFW in Motion Forward Together: The Concessions Outlook**
Zenola Campbell, VP Concessions

02 **Momentum in the Marketplace Moving Smarter: CRDC Takes Flight**
Zenola Campbell, VP Concessions

03 **The Pulse of DFW: Our Passenger Movement**
Naveen Bandla, VP Enterprise Data & Analytics

04 **Passengers in Motion: Understanding the Terminal Landscape**
John Ball, Principal, Airline Property Manager, Aviation Real Estate

05 **Routes in Motion: Where DFW is Going**
Daniel Goodwyn, Manager Airline Business Development

06 **New & Noteworthy: Expanding the DFW Experience**
Jennifer Simkins, AVP Concessions

07 **Moving With the Customer**
Christopher Bailey, AVP Parking Business Group, Parking

08 **From Curb to Gate: Keeping DFW Moving**
Megan Bozarth, AVP Customer Experience

09 **Building What's Next**
Tammy Huddleston, VP Design, Code & Construction

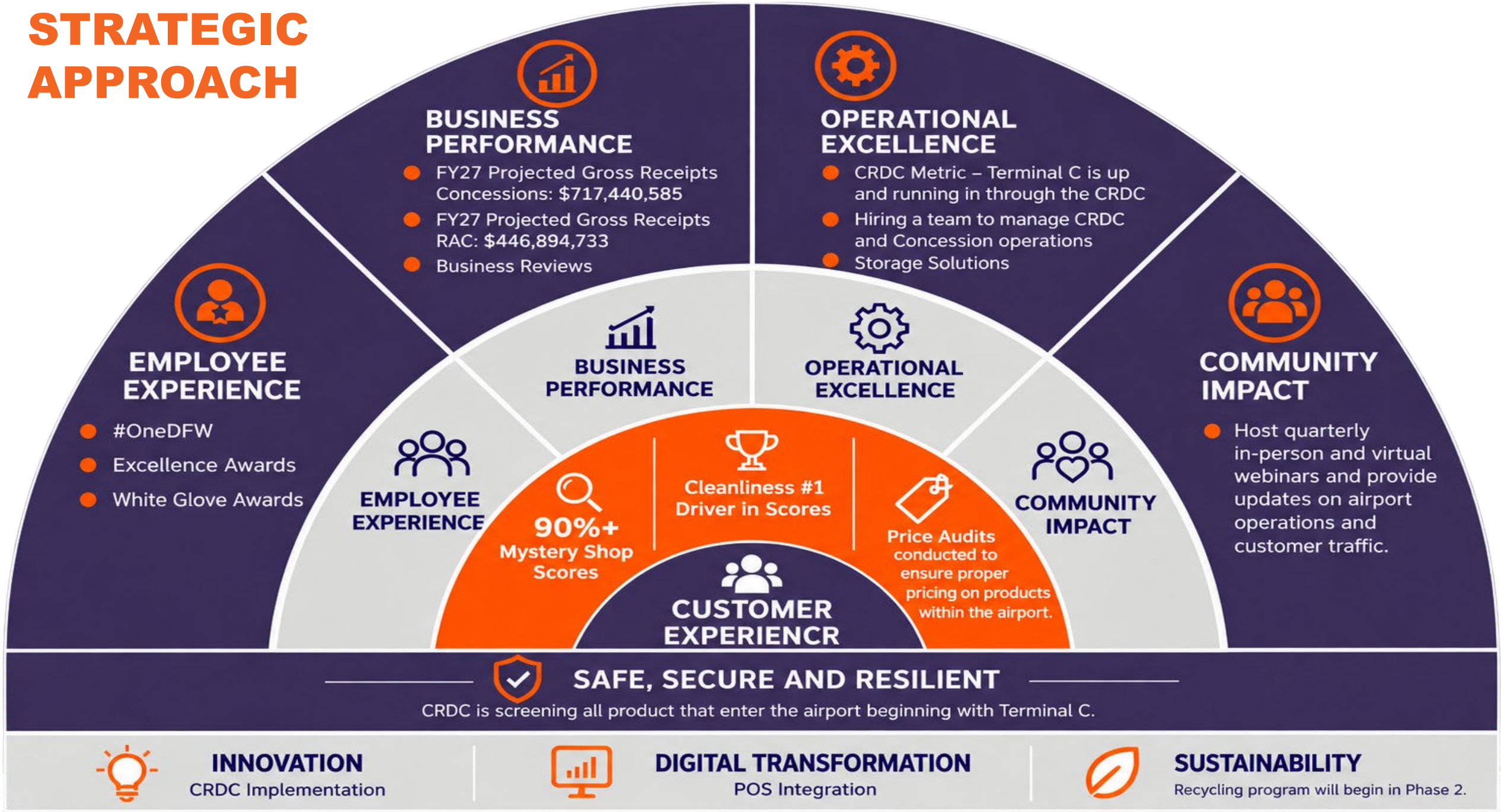
10 **Update: Business Development**
Tamela Lee, VP Business Development

11 **The Momentum Is Ours**
Ken Buchanan, EVP & Chief Revenue Officer

Setting DFW in Motion
Forward Together:
CONCESSION OUTLOOK

ZENOLA CAMPBELL, VP CONCESSIONS

STRATEGIC APPROACH





MARK YOUR CALENDARS

DECEMBER 16, 2026

HYATT REGENCY

Our annual celebration honoring concessionaires and employees will is coming soon. Be ready to wear your **Purple**—it's our color theme this year. **eNews to RSVP coming soon**. Hope to see you there!



FIFA IMPACT

- **52% of respondents reported customer traffic increased by more than 10%** compared to the same period last year
- **FIFA produced a net positive business impact.** The average sales impact rating was 3.83 out of 5, with 64% reporting positive or significant positive sales impacts.
- **Evening operating hours (4 PM – Close)** experienced the strongest sales uplift, suggesting FIFA-related travel is heavily concentrated later in the day.
- FIFA generated a clear and measurable lift in concessions revenue, **driving June 2026 to one of the FY26's highest-performing months** and accelerating spring-to-summer growth beyond normal seasonal patterns.

TOTAL SALES

JUNE 2026

~$109.7M

JULY 2026

~$105.6M

DFW

WHITE GLOVE AWARDS FY26

Please stay tuned for the announcement of the WGA FY26 Final Winner—to be released via e-news by the end of October!

CLEAN **WORKING** **FRIENDLY**











The White Glove Award

We're honored to announce the Q1 FY2026 winners

Terminal A
- A17 Bugatti Bar & Tavern
- A17 Brighton
- A25 La Madeleine Country French Cafe Self-Service Kiosk
- A34 Panera Bread Self-Service Kiosk
- A35 McDonald's Self-Service Kiosk

Terminal B
- B12 Texas Monthly Starbucks
- B33 Auntie Anne's
- B41 Natalie's Sweet Gourmet

Terminal C
- C14 Pappadeaux Seafood Kitchen
- C15 Maggiano's Little Italy
- C15 Maggiano's Little Italy Self- Service Kiosk
- C33 Chili's
- C33 Chili's Self-Service Kiosk
- C33 Fort Worth Magazine Self-Service

Terminal D
- D3 Cake Bar/ Kate Wiser Chocolate/Counter Coffee
- D4 Grab and Fly-Just Walk Out powered by Amazon
- D10 Dude, Sweet Chocolate
- D27 MK-Michael Kors
- D27 Artisan Market Self-Service Kiosk
- D27 CRU Wine Bar
- D27 Dickey's BBQ
- D34 Univision, Expressions by La-Self-Service Kiosk
- D36 Auntie Anne's

Terminal E
- E5 Chick Fil-A
- E8 Hudson/Dunkin Donuts Self-Service Kiosk

The White Glove Award

We're excited to announce our winners for Q2 FY 2026

Terminal A
- A14 T.G.I. Friday's on the fly Self-Serve Kiosk
- A21 Auntie Anne's
- A25 Twisted Root Burger
- A25 Brookstone
- A28 Pappasitos
- A33 Lorena Garcia Tapas Self- Serve Kiosk
- A34 Johnston & Murphy
- A34 Panera Bread
- A34 Panera Bread Self-Serve Kiosk
- A39 Southwest News

Terminal B
- B7 Dunkin Donuts
- B12 Smashburger
- B25 Wing Stop Self-Serve Kiosk
- B28 Hudson Nonstop
- B30 World News and Gifts
- B43 Cousins Bar-B-Q

Terminal C
- C7 Newslink
- C7 T.G.I. Friday's
- C14 Pappadeaux Seafood Kitchen
- C15 Maggiano's Little Italy Self-Serve Kiosk
- C21 Starbucks

Terminal D
- D4 Grab and Fly Just Walk out powered by Amazon
- D10 Applebee's
- D12 Smoothie King
- D17 Chick-Fil-A
- D21 Dallas Cowboys Pro Shop
- D22 Bar Louie
- D24 Longchamp
- D24 IceCurrency
- D27 Artisan Market
- D27 Dickey's BBQ
- D34 McDonald's Self-Serve Kiosk
- D34 Italian Kitchen
- D34 Univision, Expressions by La Self-Serve Kiosk
- D36 Auntie Anne's

Terminal E
- ES Freshens/Boar's Head Deli
- E31 2.0 Taco & Tequila Bar
- E33 Chili's
- E33 Panda Express

The White Glove Award

We're excited to announce our winners for Q3 FY 2026

Terminal A
- A17 Brighton
- A 17 Bugatti Bar &Taverna
- A19 L'Occitane
- A28 Ertekin Fashions
- A33 Lorena Garcia Tapas Dallas
- A33 Lorena Garcia Tapas Dallas-Self Serve Kiosk
- A34 Panera Bread-Self-Serve Kiosk
- A35 McDonald's-Self Serve Kiosk

Terminal B
- B12 T.G.I. Friday's-Self Serve Kiosk
- B25 Wing Stop-Self Serve Kiosk
- B28 Hudson NonStop
- B33 Brighton

Terminal C
- C15 Maggiano's Little Italy-Self Serve Kiosk
- C 33 Freshens/Boar's Head Deli
- C33 Chili's
- C33 Chili's Self-Serve Kiosk
- C35 Peach Cobbler Factory

Terminal D
- D4 Grab and Fly Just Walk out powered by Amazon
- D24 Chili's Bar and Grill
- D27 Cru Wine Bar
- D34 Univision, Expressions by La
- D34 McDonald's-Self Serve Kiosk
- D39 World News and Gifts

Terminal E
- E8 Hudson/Dunkin Donuts
- E17 T.G.I. Friday's
- E36 Sundance Travel

RAC
- Autobites


SHARE YOUR
HOLIDAY MAGIC
A questionnaire is coming your way! Share what's happening at your locations so we may highlight your great ideas.
DFW

THANK YOU
TO OUR CONCESSIONAIRES

RAC. FIFA. CRDC. AND SO MUCH MORE.

We couldn't have achieved these major milestones without your hard work and collaboration.

Thank you for an outstanding year.



DFW | CONCESSIONS



SAVE THE DATE

CONCESSIONAIRE OWNER'S FORUM

JANUARY 20, 2027 | GRAND HYATT DFW

DFW



Moving Smarter:
CRDC TAKES FLIGHT

CONCESSIONS





CRDC | GRAND OPENING CELEBRATION & TOUR









A SPECIAL

Thank You

PAPPAS RESTAURANTS®

MAGGIANO'S® LITTLE ITALY®

for your participation as the **First Delivery** in **overnight CRDC deliveries** and making it a success!

YOUR PARTNERSHIP KEPT US ON TIME

YOUR TEAM MADE IT HAPPEN

YOUR COMMITMENT STRENGTHENS DFW AND OUR TRAVELER EXPERIENCE

DFW | CONCESSIONS

TIMELINE BY TERMINALS

NOV 2026

Terminal A & E



MAY 2027

Terminal F



OCT 2026

Terminal C



DEC 2026

Terminal B & D



CRDC REFRESHERS

OPERATIONS

- CRDC receives product 24/7
- Delivery window: **11 PM – 5 AM**
- **Exceptions:** fresh fish, fresh produce, fresh bakery items, duty-free bonded merchandise, and occasional hot shots
- Exceptions do not include normal product delivery
- Store receiver must be onsite at the pre-set delivery time
- Product is to be put away immediately so stores open fully stocked and customer focused

WEEK 1 OBSERVATIONS: CONCESSIONAIRES

- Several stores observed had a proper receiving team ready to accept, check temperatures, and put away
- Reminder: Coca Cola orders are due by **9 AM** to be received for same-night delivery; product ordered after 9 AM will be received for the following night delivery
- Receivers not onsite, product returned to the CRDC for next night delivery
- Remove pallets from the terminal if it is not emptied in time for Bradford's last pickup run
- Work with Bradford on a pickup location if needed

WEEK 1 OBSERVATIONS: CRDC PROCESS

- Tightened timeline for cold/frozen products for minimal time outside of a cooler and the refrigerated freezer
- When combining pallets to ensure deliveries are made at the correct time verify pallet delivery as some stores have the same names
- System login issues and badge access issues have been resolved





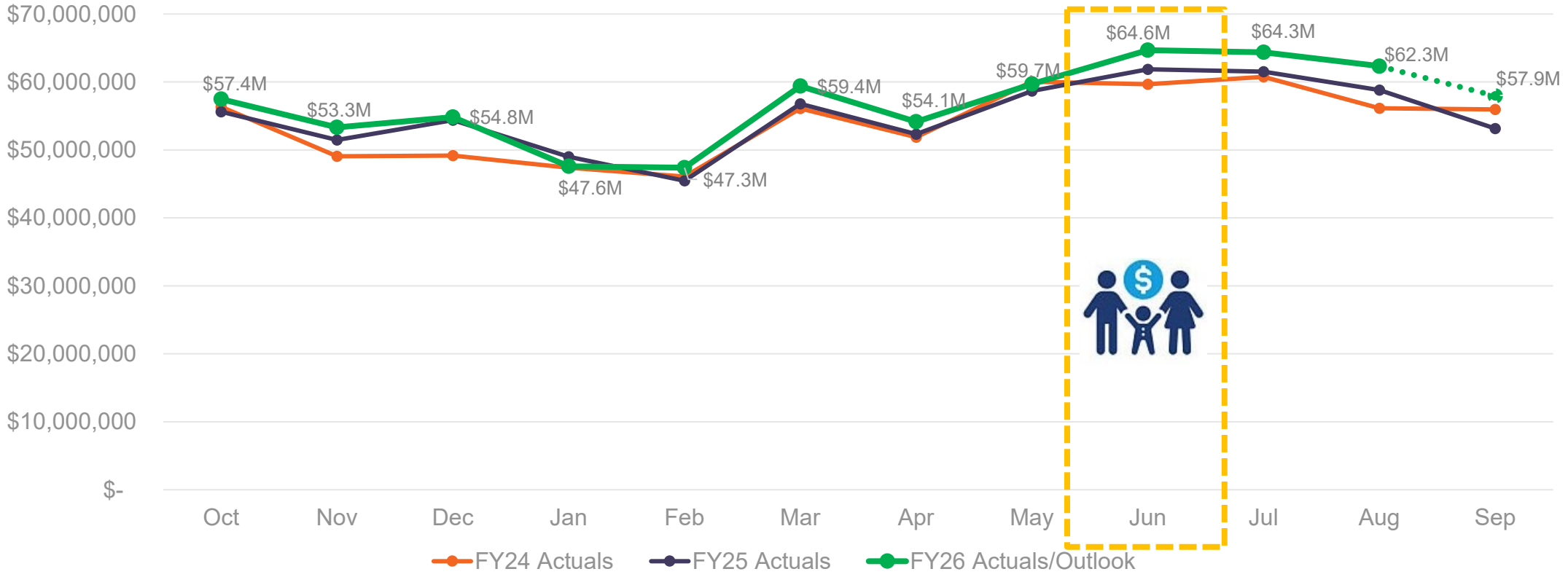
Financial Review

MOMENTUM IN THE MARKETPLACE

CONCESSIONS

Total Gross Receipts FYTD through August

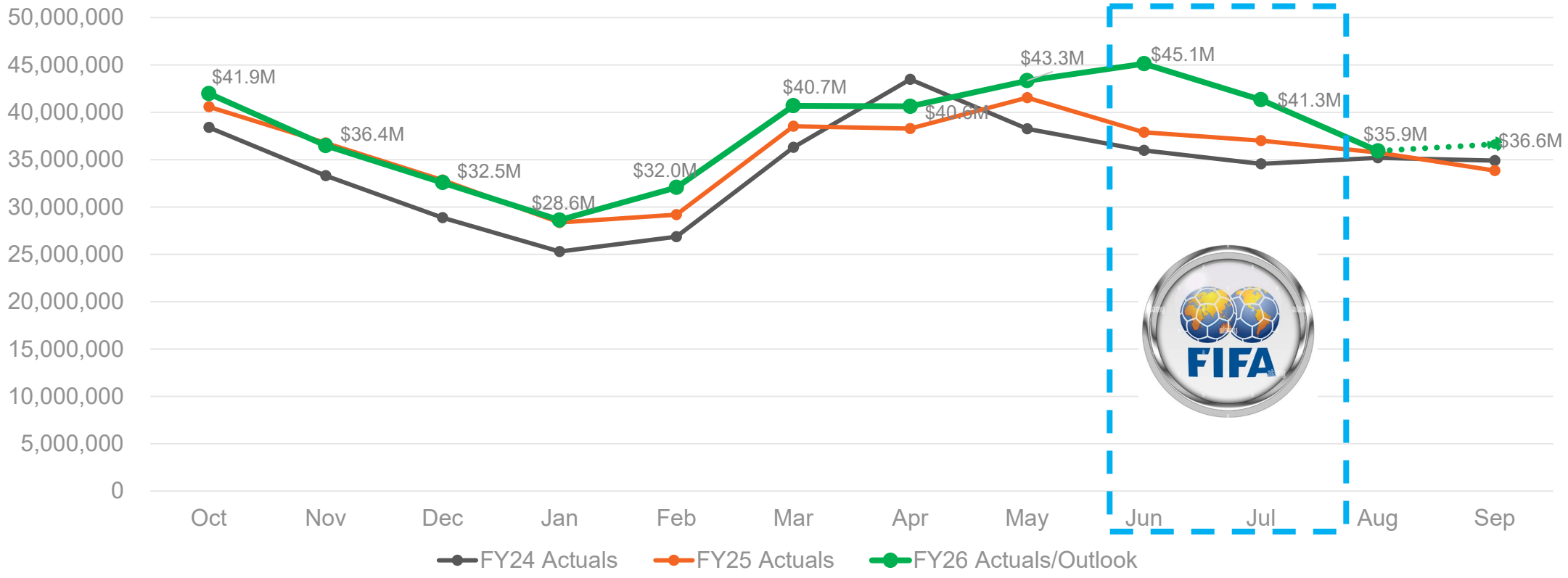
FY26 Outlook: $683.2M, $24.2 M or 3.7% above FY25. Spend per passenger remained strong, reaching a record $16.82 in June.



Note: September includes Outlook Numbers.

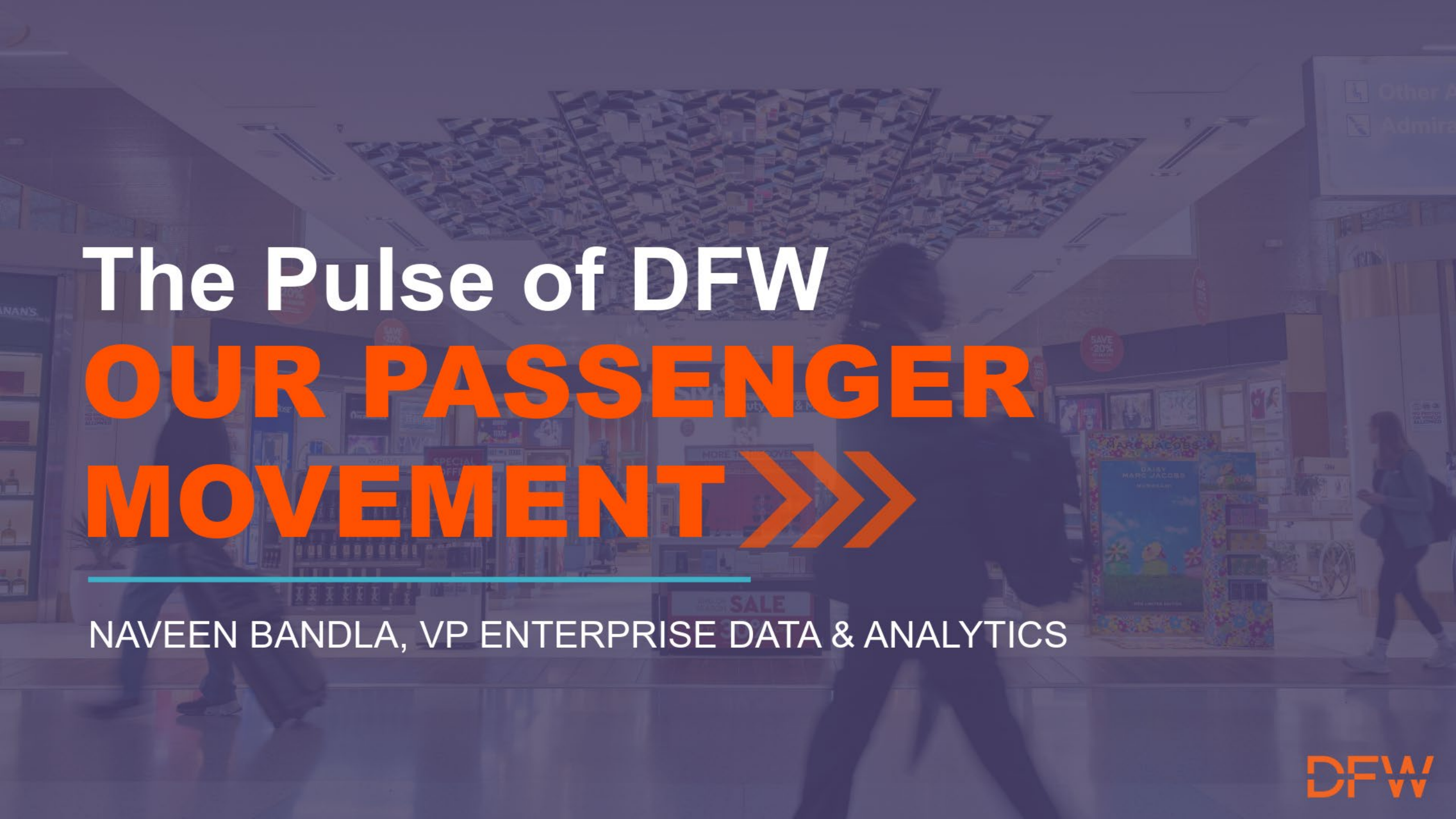
RAC Gross Receipts FYTD through August

FY26 Outlook: $455.3M, $24.7M or 5.7% above FY25. Gross Receipts exceeded expectations during FIFA, up $7.2M or 19.1% June, up $4.3M or 11.7% in July vs. FY25.



Note: The -6.55% decline in April is from the 2024 Eclipse.

- September includes Outlook Numbers

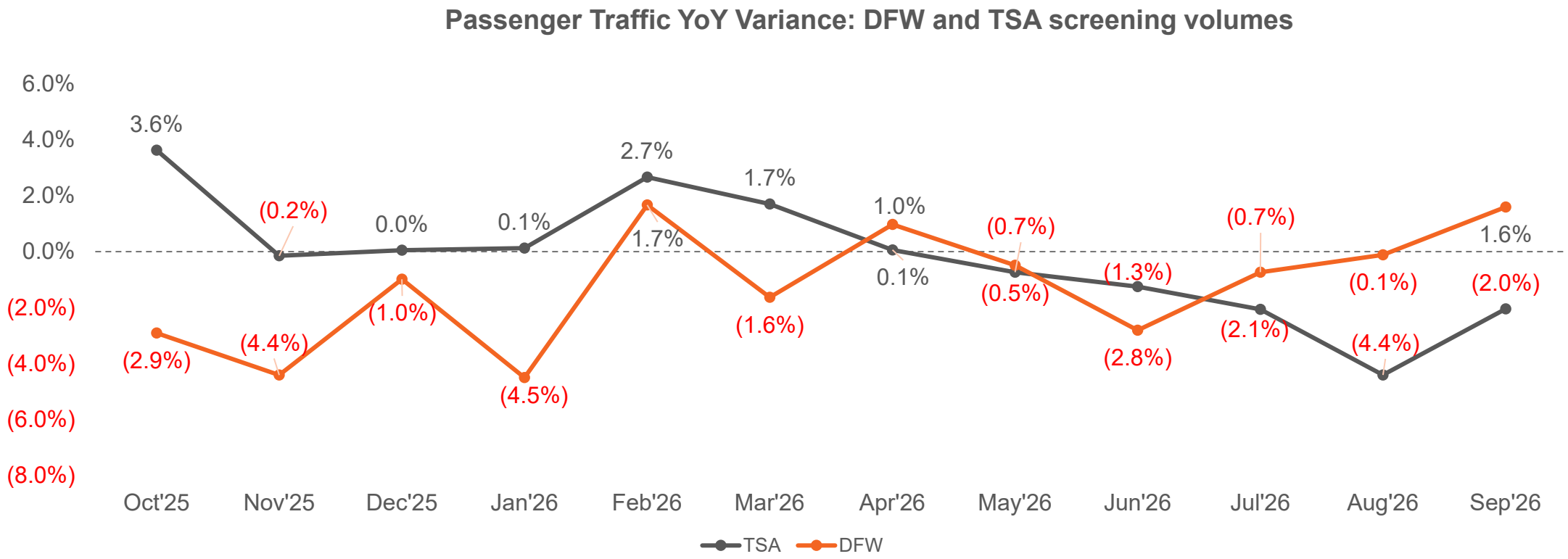


The Pulse of DFW

OUR PASSENGER MOVEMENT

NAVEEN BANDLA, VP ENTERPRISE DATA & ANALYTICS

DFW and industry pax volumes have softened this year due to macroeconomic headwinds



Source: DFW Internal Statistics and TSA website

Most US airport hubs saw passenger declines

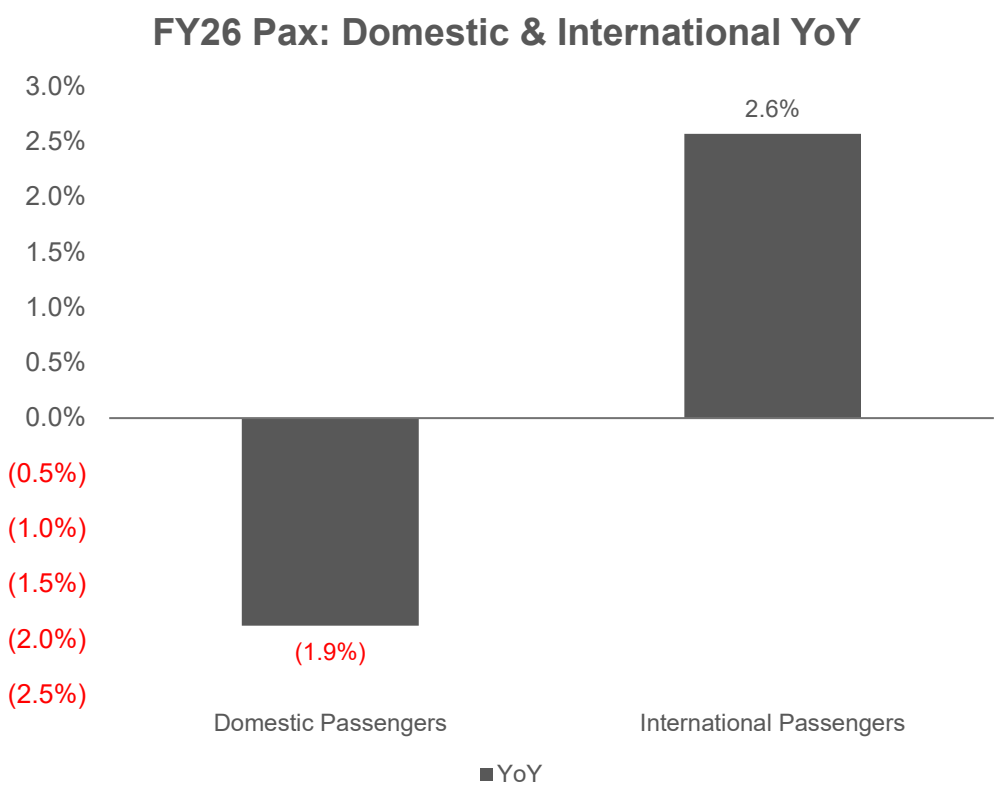
Year-over-Year Total Passenger Growth

Major U.S. Airports Ranked by Passenger Volume, Oct 2025–Jul 2026 | Monthly and FYTD YOY through Each Airport's Latest Available Month

Rank	Airport	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	FY26
1	ATL	+0.0%	-6.5%	-4.3%	+0.6%	+1.7%	-1.5%	+0.7%	-1.1%	-1.4%	-2.3%	—	—	-1.5%
2	ORD	+10.5%	+3.0%	+2.8%	+2.6%	+14.8%	+7.9%	+9.7%	+2.7%	+2.2%	+3.2%	—	—	+5.6%
3	**DFW**	-2.9%	-4.4%	-1.0%	-4.5%	+1.7%	-1.6%	+1.0%	-0.5%	-2.8%	-0.7%	-0.1%	+1.6%	-1.2%
4	DEN	+3.7%	+0.4%	-1.5%	-1.1%	+2.0%	+2.8%	+1.5%	+1.4%	+2.3%	-0.2%	—	—	+1.1%
5	LAX	-3.4%	-3.8%	-3.5%	+0.8%	+0.9%	-0.1%	-3.1%	-2.5%	-1.4%	-1.6%	—	—	-1.9%
6	JFK	-2.9%	-2.4%	-4.5%	-4.1%	-5.2%	-2.1%	-5.3%	-7.6%	-4.8%	-7.2%	—	—	-4.7%
7	MIA	+1.3%	+0.8%	-0.3%	+0.4%	+0.6%	-1.8%	-2.0%	+0.5%	-1.4%	+0.1%	—	—	-0.2%
8	SFO	+2.7%	+1.7%	-0.9%	-0.6%	+4.4%	+6.3%	+1.0%	+0.5%	+1.6%	+0.6%	—	—	+1.6%
9	PHX	-0.5%	-3.3%	+0.4%	+2.5%	+3.3%	+1.3%	-1.5%	+0.2%	+0.1%	+0.4%	—	—	+0.2%
10	SEA	-1.5%	-2.2%	-2.3%	-2.4%	+1.5%	+3.3%	-2.6%	+1.3%	+0.0%	-0.3%	—	—	-0.5%
11	CLT	-8.0%	-12.7%	-12.4%	-14.4%	-8.2%	-7.1%	-6.8%	-6.7%	-6.1%	-6.3%	—	—	-8.8%
12	IAH	-0.5%	-2.1%	+0.1%	+2.0%	+4.1%	+1.1%	-1.8%	-1.5%	+0.2%	+0.2%	—	—	+0.1%
13	EWR	-0.2%	-1.7%	-0.4%	-3.2%	-4.8%	+2.3%	+2.3%	+14.8%	+5.1%	-4.1%	—	—	+0.9%
14	BOS	-1.7%	-5.0%	-4.8%	-3.8%	-3.2%	+0.3%	+0.6%	+0.2%	+1.1%	-3.7%	—	—	-1.9%
15	MSP	-1.2%	-4.4%	-9.0%	-3.6%	-1.8%	-6.6%	-0.3%	-0.3%	-1.5%	-1.1%	—	—	-3.0%
16	DTW	+4.1%	-0.1%	-4.1%	-2.1%	+3.9%	+0.9%	-1.5%	-4.8%	-7.4%	-6.3%	—	—	-2.0%
17	LGA	-1.2%	-3.9%	-4.0%	-3.4%	-1.4%	-4.3%	-2.8%	-4.9%	-1.8%	-3.5%	—	—	-3.2%
18	PHL	-2.0%	-1.9%	-4.9%	-1.1%	-1.6%	-1.5%	-4.6%	-1.2%	+8.5%	+1.8%	—	—	-0.7%
19	SLC	+0.9%	-1.3%	-0.7%	+0.5%	+1.9%	+0.8%	+5.3%	+2.3%	+2.3%	+1.2%	—	—	+1.3%
20	IAD	-0.3%	-1.3%	+0.6%	-2.5%	+3.2%	+0.5%	+0.3%	-4.8%	-6.5%	-0.2%	—	—	-1.4%
21	DCA	-1.2%	-10.3%	-6.3%	-4.6%	+7.1%	+4.6%	+2.4%	-1.1%	-0.4%	+0.8%	—	—	-1.0%
	TSA Nationwide	+3.6%	-0.2%	+0.0%	+0.1%	+2.7%	+1.7%	+0.1%	-0.7%	-1.3%	-2.1%	-4.4%	-2.0%	-0.3%

Source: ACI Intelligence Hub; selected AA, UA, and DL hub airports.

International passenger volumes did grow, while domestic traffic softened

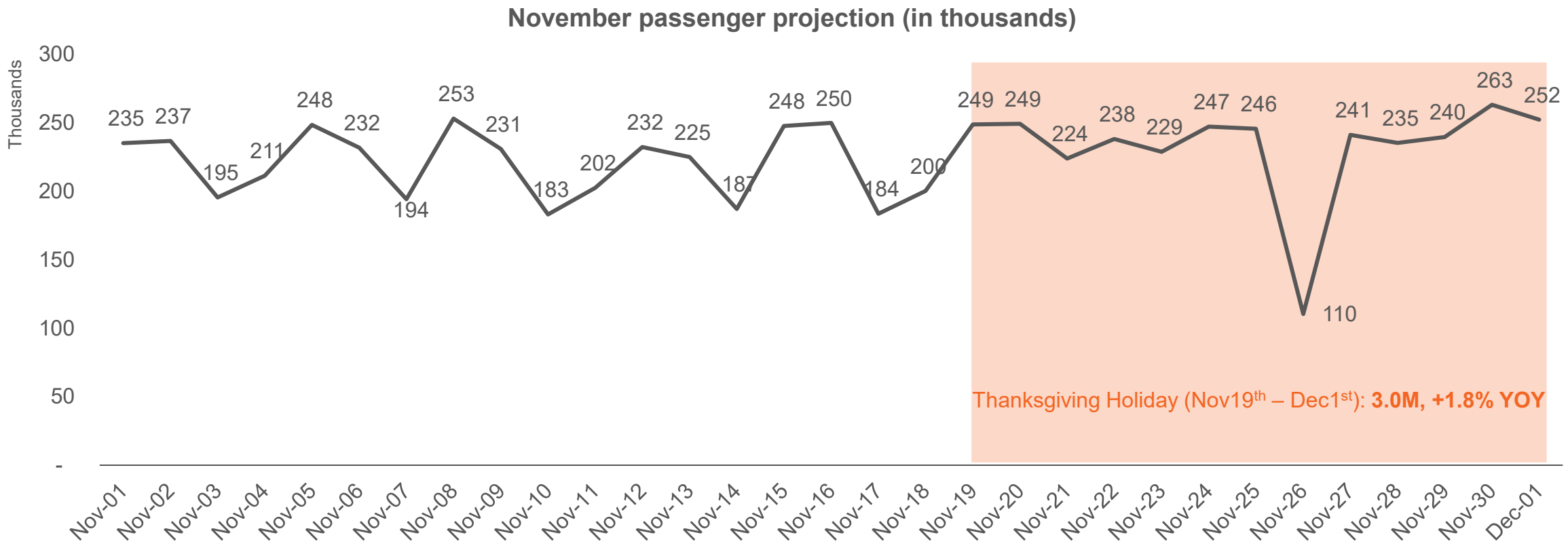




New International Destinations:	5 (AMM, ATH, TPE, PXM, ZRH)

Source: DFW Internal Statistics

Looking ahead, Thanksgiving holiday travel is looking strong



Source: DFW Passenger forecast

Airlines expect strong demand in Q4

American Airlines

"Looking ahead, we expect demand to remain strong and our commercial execution to keep improving through the back half of the year.” (CEO Robert Isom, Q2 2026 call)

UNITED

"As we look into the fourth quarter, bookings are tremendously strong." He added there is "very little evidence of demand destruction.” (CFO Mike Leskinen, Morgan Stanley Laguna conference)

DELTA

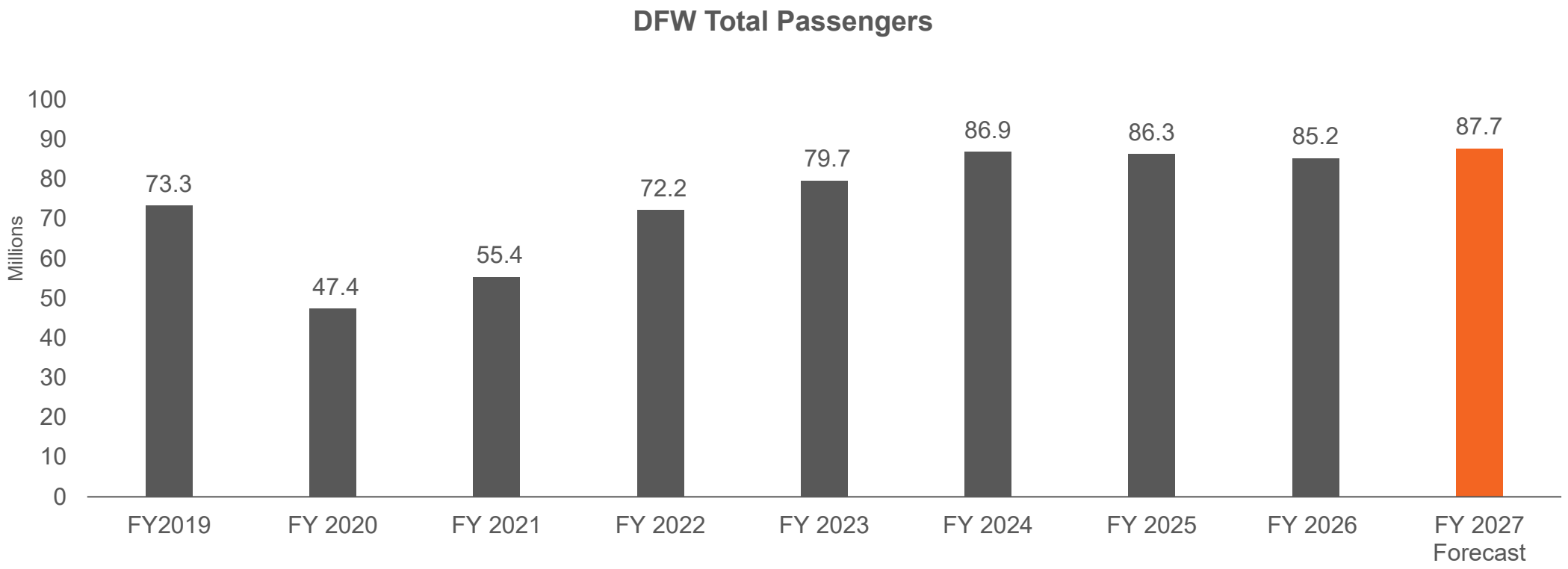
"While it remains early, December quarter bookings are coming in strong.” (Chief Commercial Officer Joe Esposito, Q2 2026 call)

Alaska AIRLINES

"Advance bookings look "very strong" at yields the same as or better than Q3.” (President and CFO Shane Tackett, Q2 2026 call)

DFW

DFW is projected to reach 87.7M passengers in FY27, up 2.9% YoY



Source: DFW Internal Statistics



Passengers in Motion
UNDERSTANDING THE TERMINAL LANDSCAPE

JOHN BALL, PRINCIPAL, AIRLINE PROPERTY MANAGER

DFW

AA Schedule Highlights

Winter 2026 Highlights

October 2026

Overall Peak Day Activity

Total departures: 902 (-2 MoM, +10 YoY)

Mainline: 558 (+7 MoM, +19 YoY)

Regional: 344 (-9 MoM, -9 YoY)

Day of Week Schedule Structure

The peak-day 13-bank structure operates on all days of week.

Schedule cuts on Tuesdays/Wednesdays/Saturdays.

Winter IATA season begins Saturday 24Oct

Halloween Schedule Reductions

12-bank structure on Tuesday 27Oct, Wednesday 28Oct, and Saturday 31Oct with the last bank of the day removed from the schedule

November 2026

Overall Peak Day Activity

Total departures: 908 (+6 MoM, +20 YoY)

Mainline: 552 (-6 MoM, -25 YoY)

Regional: 356 (+12 MoM, +45 YoY)

Day of Week Schedule Structure

November 1H: The peak-day 13-bank structure operates on all days of week except Tuesday and Saturday.

November 2H: The peak-day 13 bank structure operates on all days of week.

Thanksgiving Day (11/26)

Majority of operations complete by 14:00, remaining departures and arrivals after 14:00 primarily international and Flagship flights.

Regional operation – no scheduled arrivals or departures after 14:00

December 2026

Overall Peak Day Activity

Total departures: 907 (+3 MoM, +25 YoY)

Mainline: 549 (+2 MoM, -20 YoY)

Regional: 358 (+1 MoM, +45 YoY)

Day of Week Schedule Structure

The peak-day 13-bank structure operates on all days of week.

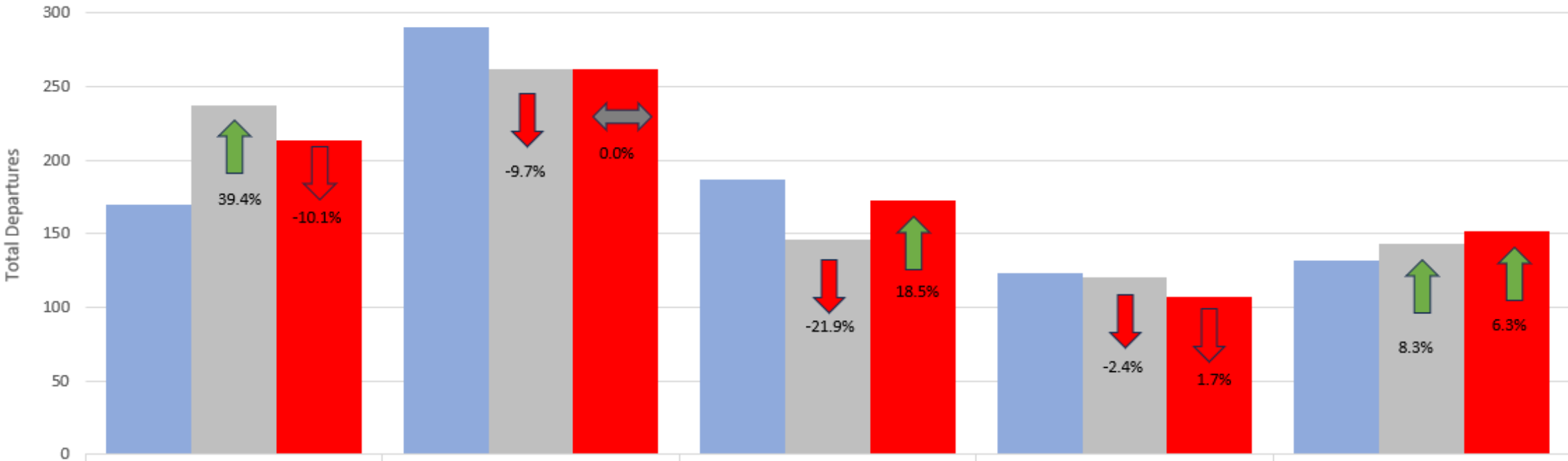
Minor cuts for Tuesdays and Saturdays on the 13-bank structure: scheduled departures reduced by 2.9% and 1.8%, respectively.

Holiday Schedules

Please note this P1 represents the peak DFW schedule for the Dec 2H schedule period and **does not** include holiday bank cancels and drawdowns. Adjustments related to the holiday schedules will be included in the fully dated P2 schedule.

AA Schedule Highlights

AA Average Departures per Day



	A	B	C	D	E
Oct-26	170	290	187	123	132
Nov-26	237	262	146	120	143
Dec-26	213	262	173	107	152

Terminals

	Oct-26	Nov-26	Dec-26
AA Monthly Average Departure	902	908	907

Source: DFW Internal Data



Routes in Motion:
WHERE DFW IS GOING

DANIEL GOODWYN, MANAGER AIRLINE BUSINESS DEVELOPMENT

Forces reshaping the airline industry

While change in the industry has been significant, demand has held strong so far (4Q earnings guidance)

1) K-shaped consumer	*Premium remains resilient while price-sensitive demand is more exposed*
2) Premiumization	*Airlines increasingly designing products and networks around willingness to pay*
3) Business-model reset	*Traditional ULCC economics under pressure (Spirit exit), value carriers adapting*
4) Scarcity allocation	*Aircraft, engines, fuel and operating constraints raise hurdle for marginal capacity*

Geopolitical conflict accelerating revenue generating initiatives

Jet fuel prices are up 112% YoY and airlines are raising fares, doubling down on premium to recover higher costs

U.S Gulf Coast Kerosene- Jet Fuel Spot Price FOB

Dollars per Gallon (Oct 25 – Sep 26)





Ed Bastian
CEO, Delta Air Lines

"Low-end fares still need to raise another 5% to break even at today's fuel prices"



Scott Kirby
CEO, United Airlines

"Demand is strong and the overall cost pressure continue forcing fares higher"



Bob Jordan
President and CEO, Southwest Airlines

"Consumers are prioritizing travel, you're seeing that even in the face of higher pricing."

FUEL COST IMPACT AND FARE RECOVERY BY CARRIER

Q2 2026

American Airlines

- Fuel expense up $2.2B, +83% YoY
- Nearly half recovered through fares and revenue

DELTA

- Fuel expense up +75% YoY, $3.93/gal
- Recapture strategy began in March.

UNITED

- Fuel expense up +84.1% YoY,
- About 50% recovered through fares, expects 80-90% in Q3

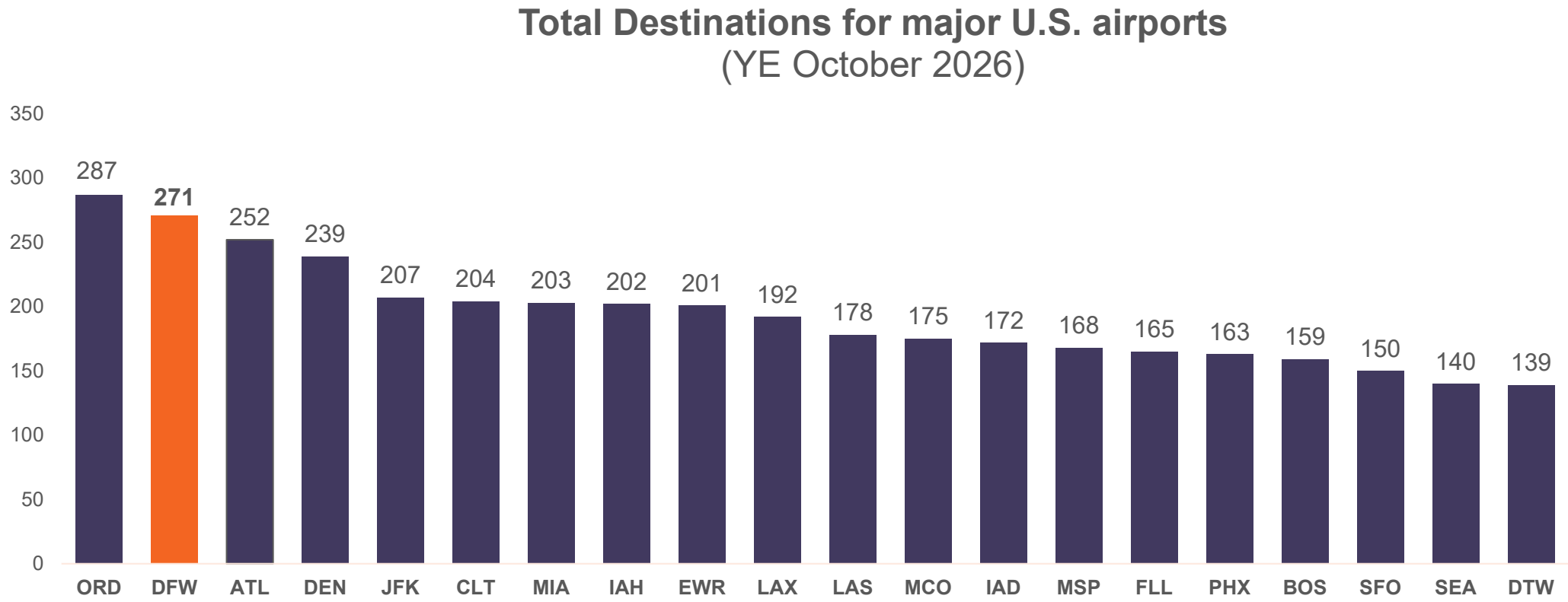
Southwest

- Fuel $3.92/gal, up nearly $900M YoY in Q2 expense
- Recapture has been swift and pricing has remained sticky

Source: https://web.quartr.com/; eia.gov Jet Fuel Spot Price

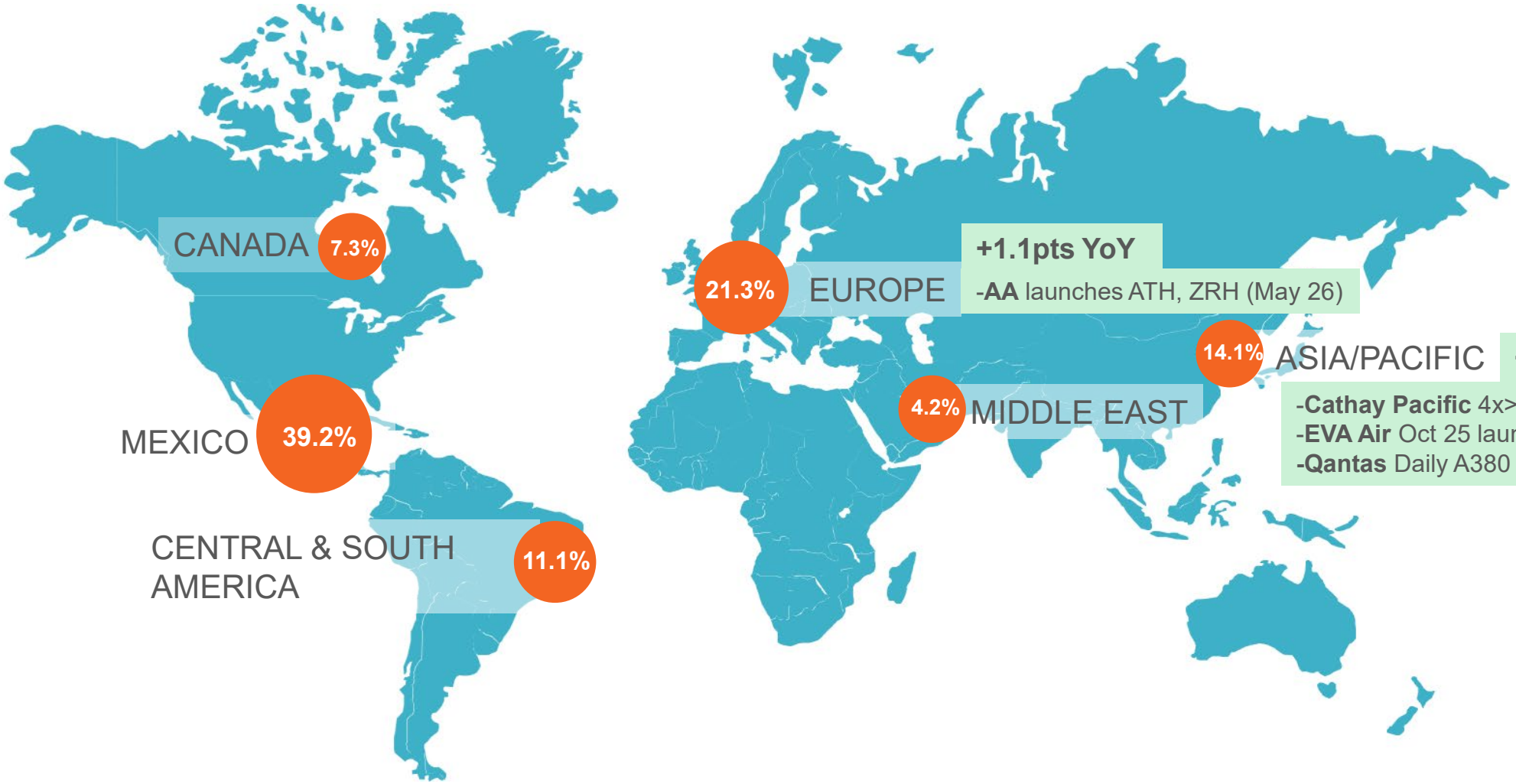
DFW

DFW ranks 2nd for destinations vs all U.S. airports



Source: Diio Mi Schedules YE October 2026 as of October 6th, 2026 and DFW internal data.

Mexico represents the largest market for all international passengers



Source: US DOT T-100 YE June 2026 & 2025 as of October 6th , 2026. Caribbean accounts for 3.9% in 2026 and 4.1% in 2025

DFW serves 13 destinations in Europe

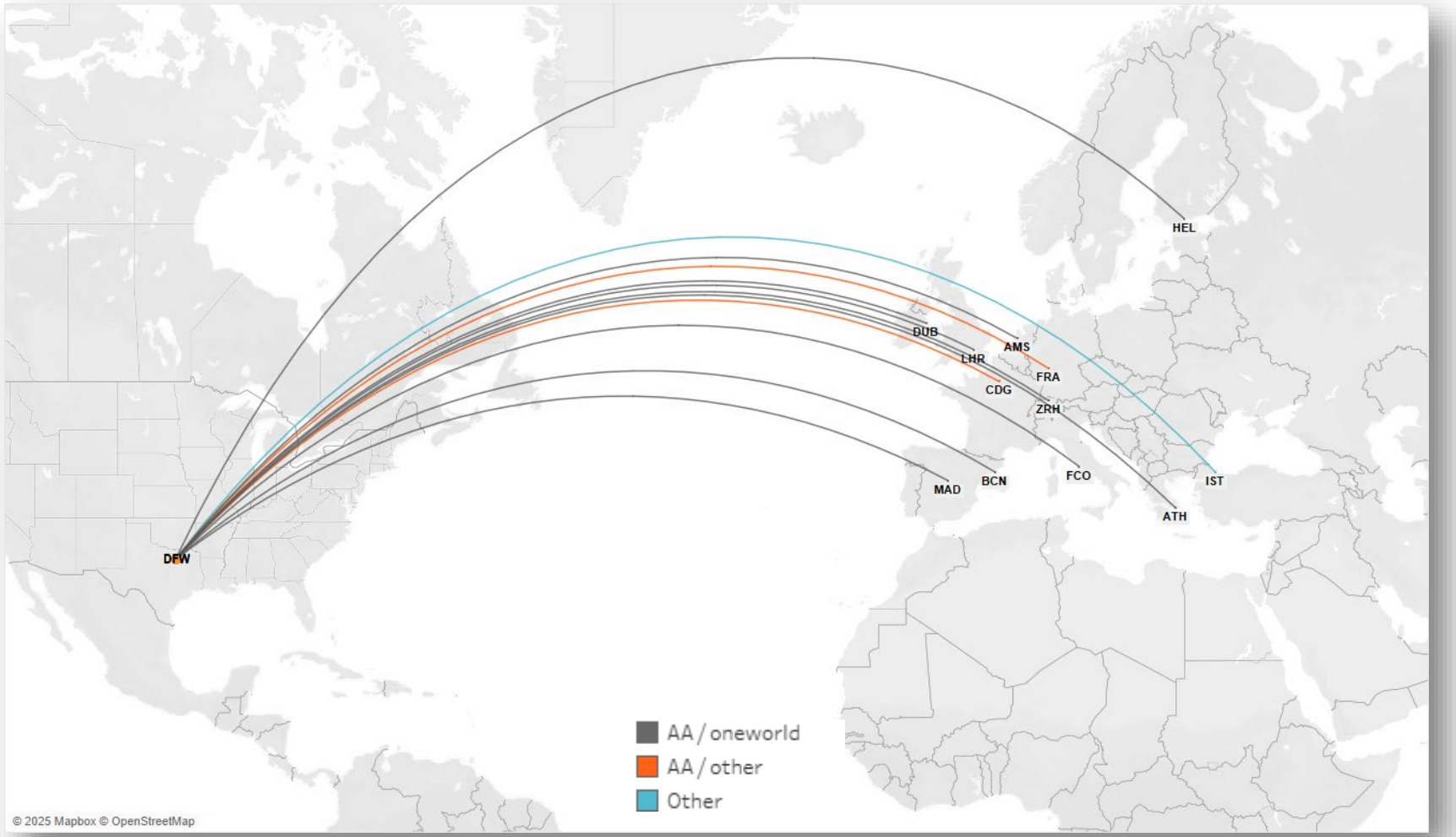
Airline partners in oneworld, SkyTeam, and Star alliances have success serving DFW-Europe

DFW – Europe destinations by operating carrier

AA/ oneworld	AA/ other	other
AMS	CDG	IST
BCN	FRA	
DUB		
FCO		
HEL		
LHR		
MAD		
VCE		
ATH		
ZRH		

Recent additions

Airline	Destination	Started
AF	CDG	Mar 19
TK	IST	Sep 21
AY	HEL	Mar 22
IB	MAD	Jun 22
AA	BCN	Apr 24
AA	VCE	Jun 25
AA	ATH	May 26
AA	ZRH	May 26

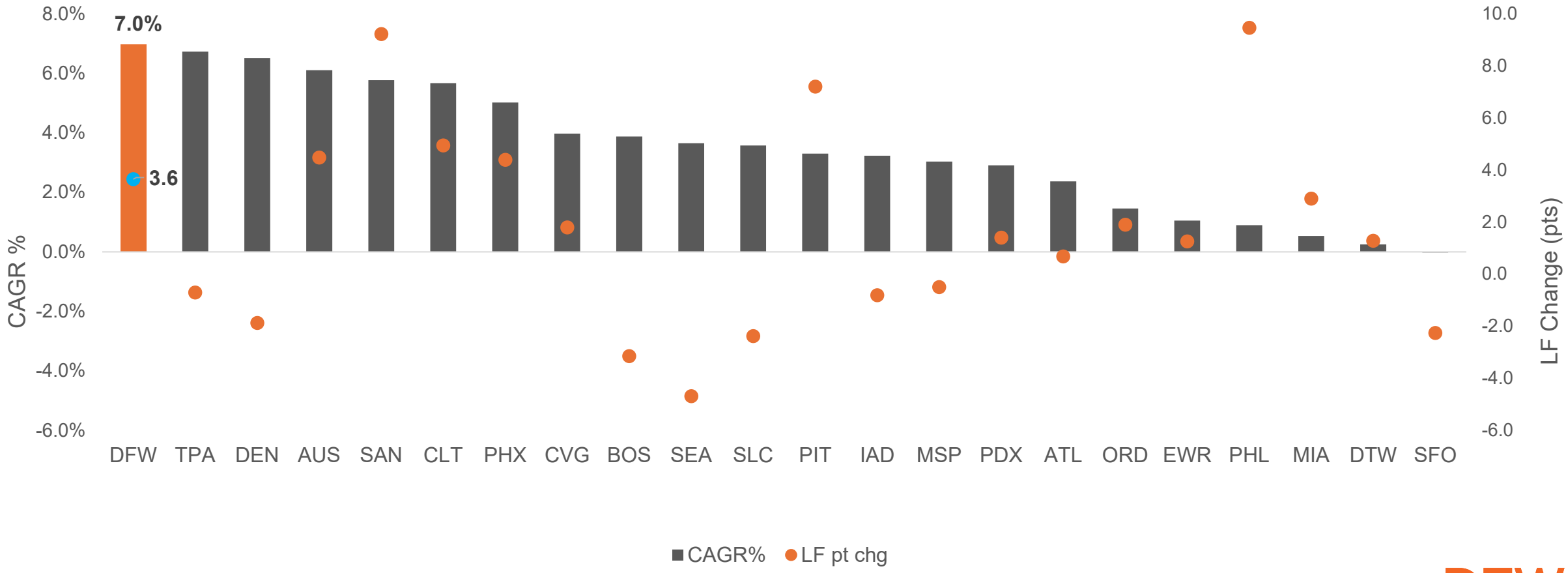


Source: Mi.Diio.net schedule data, YE Dec 2026

DFW leads U.S.-Europe passenger growth

DFW pax growth exceeded capacity growth, improving LF more than 3.6 pts to 84.7% in 2026

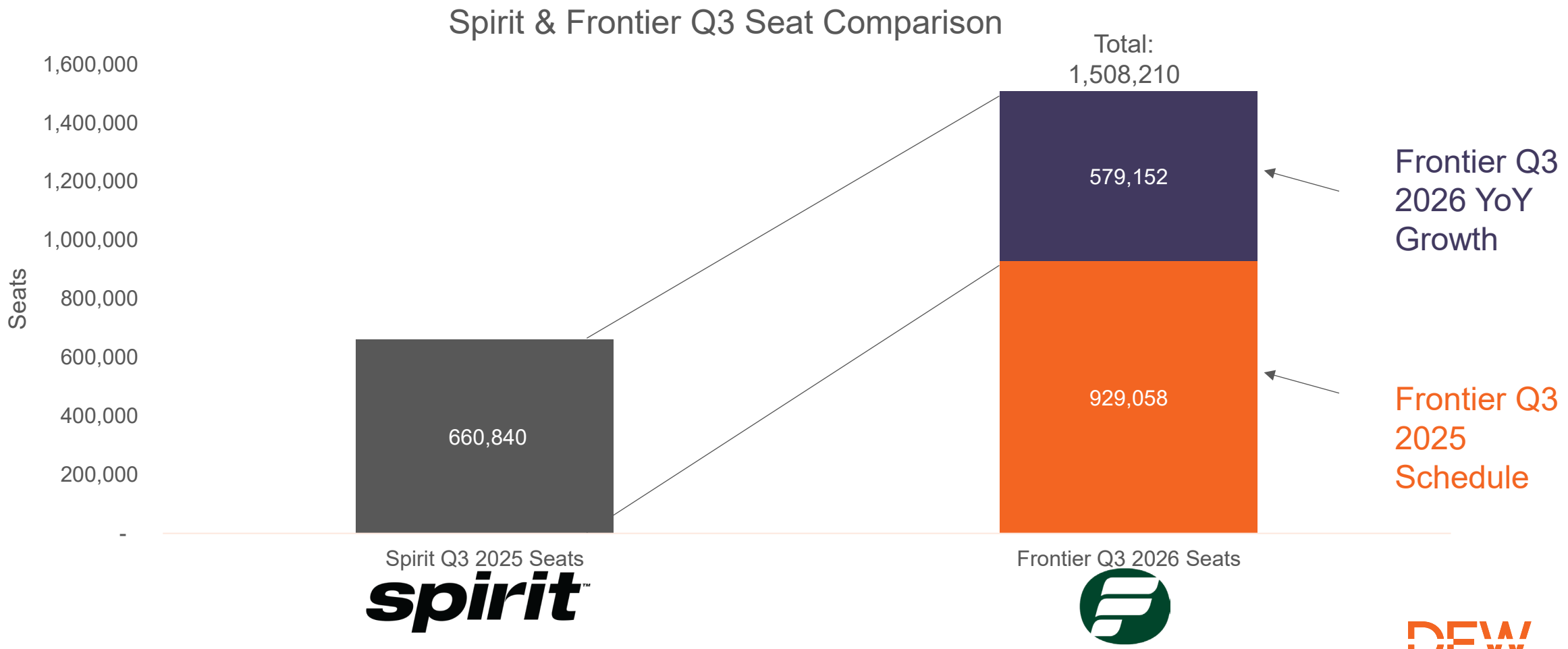
20 largest U.S. – Europe by segment pax, LF pt chg
(YE June 26 vs YE June 19)



Source: Mi.Diio.net T-100 Summary data YE Jun 2019 - 2026 from U.S to Europe / PDEW: Passenger Per Day Each Way

Frontier growth nearly replaces Spirit's presence at DFW

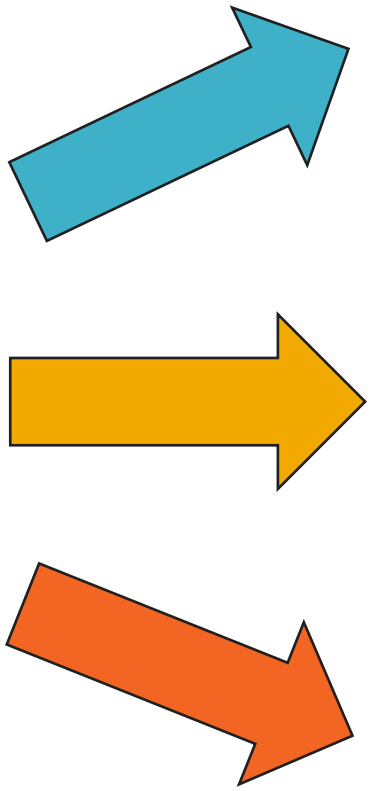
Frontier's growth in 2026 equivalent to 88% of Spirit's 2025 operation at DFW



Source: Diio Mi Schedules Q3 2026 & Q3 2025 as of October 6th, 2026

K shaped consumer overview

Airlines are increasingly competing for the top and middle of the K to deliver more revenue



TOP OF THE K – RESILIENT GROWTH
Premium cabins
Long haul international
High income leisure
Loyalty and managed corporate

MIDDLE OF THE K – VALUE, NOT JUST PRICE
Will pay for the right nonstop
Selective leisure spending
Trades up selectively
Values schedule + convenience

BOTTOM OF THE K – PRICE SENSITIVE DEMAND
Lowest fare wins
Main cabin as a commodity
Unmanaged small business
Schedule is secondary

New & Noteworthy:

EXPANDING THE DFW EXPERIENCE

JENNIFER SIMKINS, AVP CONCESSIONS

Now Open

41

locations opened in FY26

Gate D27 — The Coffee Bean & Tea Leaf

Gate D22 — Lone Chimney Mercantile

C Pier — The Peach Cobbler Factory

Gate B22 — Portillo's Hot Dogs · Beef · Burgers · Salads

Gate B9 — nektar Juice Bar

Gate D15 — Art-K-Texture

Gate D24 — Chili's

C Pier — Deep Ellum Brewing Co.

Gate D10 — Dude, Sweet Chocolate

Gate B30 — Freeflight Sweets

Gate B20 — Raising Cane's Chicken Fingers

A Pier — Bonton Farms

Gate D10 — Macoo meticulously engineered

Gate D25 — Sapphire Lounge by The Club

Gate B41 — Whataburger

Gate A15 — TGI Fridays

C Pier — airessentials

Gate E37 — Sundance Travel Essentials

Gate A21/E31 — Auntie Anne's

Gate B42/D31 — INMOTION

Gate D22 — iStore

Gate D15 — Plaza Premium Lounge

Corporate Aviation — P/S

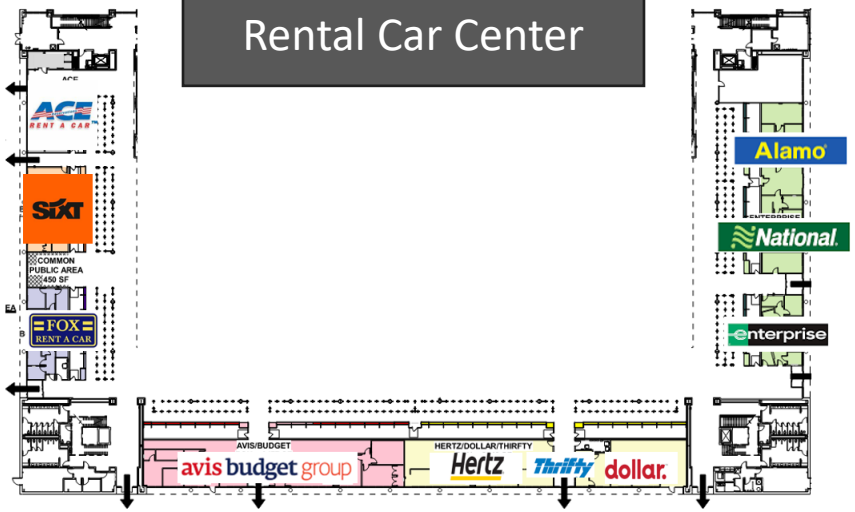
Gate E20 — Brewed Eat. Drink. Gather.

Gate D35 — Texas General Store

Gate D27 — Johnston & Murphy

Gate A20 — Smoothie King

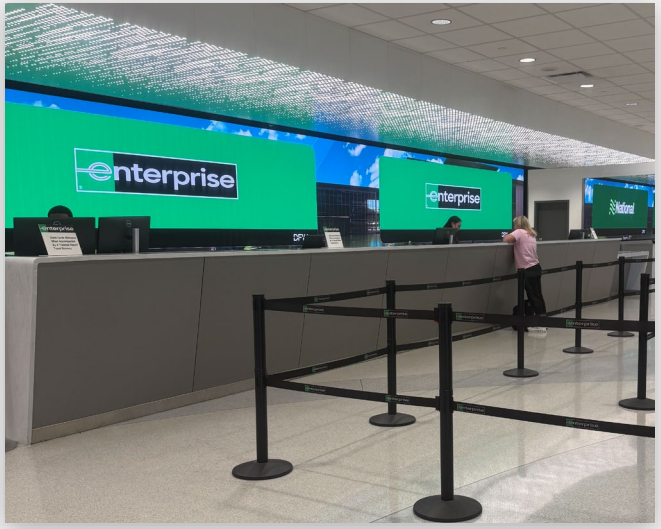
Rental Car Center

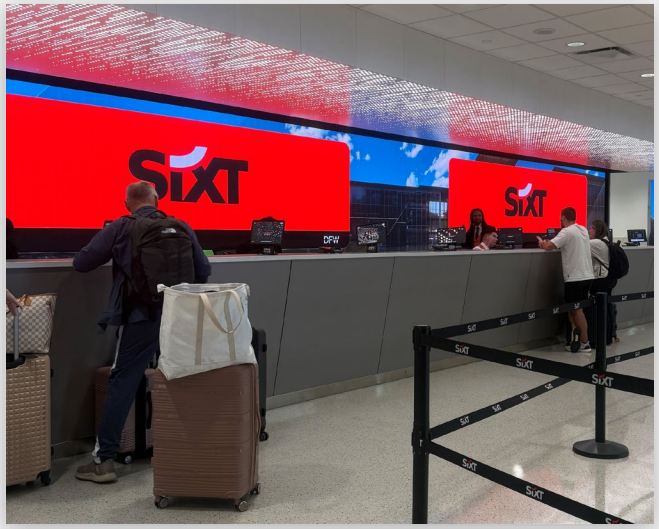


Rental Car Center Update

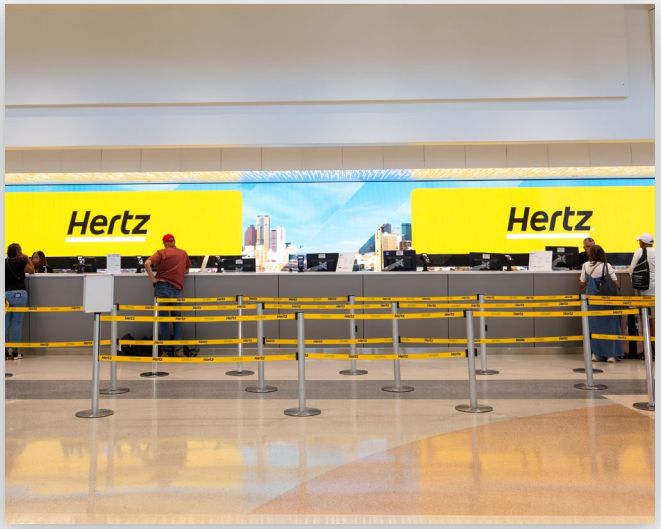








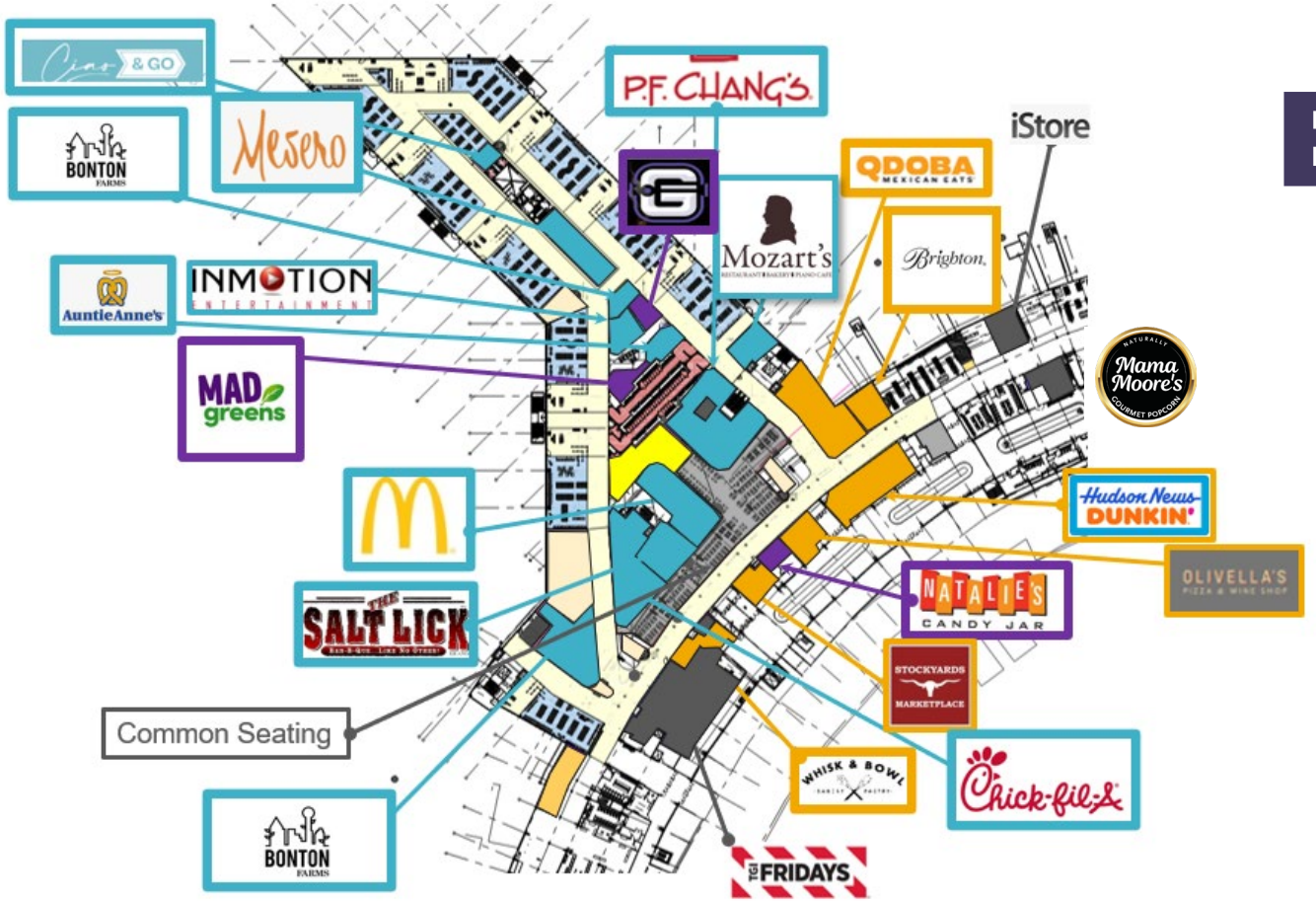




Taste What is Coming Soon

Est. **40**

Locations in FY27



A

B

PIADA ITALIAN STREET FOOD

COOKIE SOCIETY

Mama Moore's GOURMET POPCORN

La La Land KIND CAFE

C



Upcoming Concessions Events

Event	Audience	Date/Time	Location
RFP Preview	New and Existing and Vendors	October 28, 2026	Hyatt Regency
RFP Release	New and Existing and Vendors	January 2027	Bonfire
Pre-Proposal	New and Existing and Vendors	January 2027	Hyatt Regency

Sign up to receive updates on upcoming events and opportunities.





Experience in Motion:
MOVING WITH THE CUSTOMER

CHRIS BAILEY, AVP PARKING BUSINESS GROUP

DFW

DFW BY THE NUMBERS

Fiscal Year 2026

Plaza Traffic

23.9M exiting vehicles



Airside Bussing



624K passengers

7,982 total operations



Ground Transportation

105K taxi trips



6.9M TNC trips

Landside Bussing

195 buses





16.7M passengers

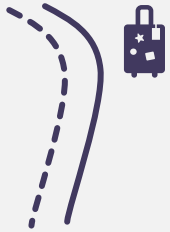
8.3M miles driven



333 trips around the earth

Curbside Management

4.2 miles of linear curbside



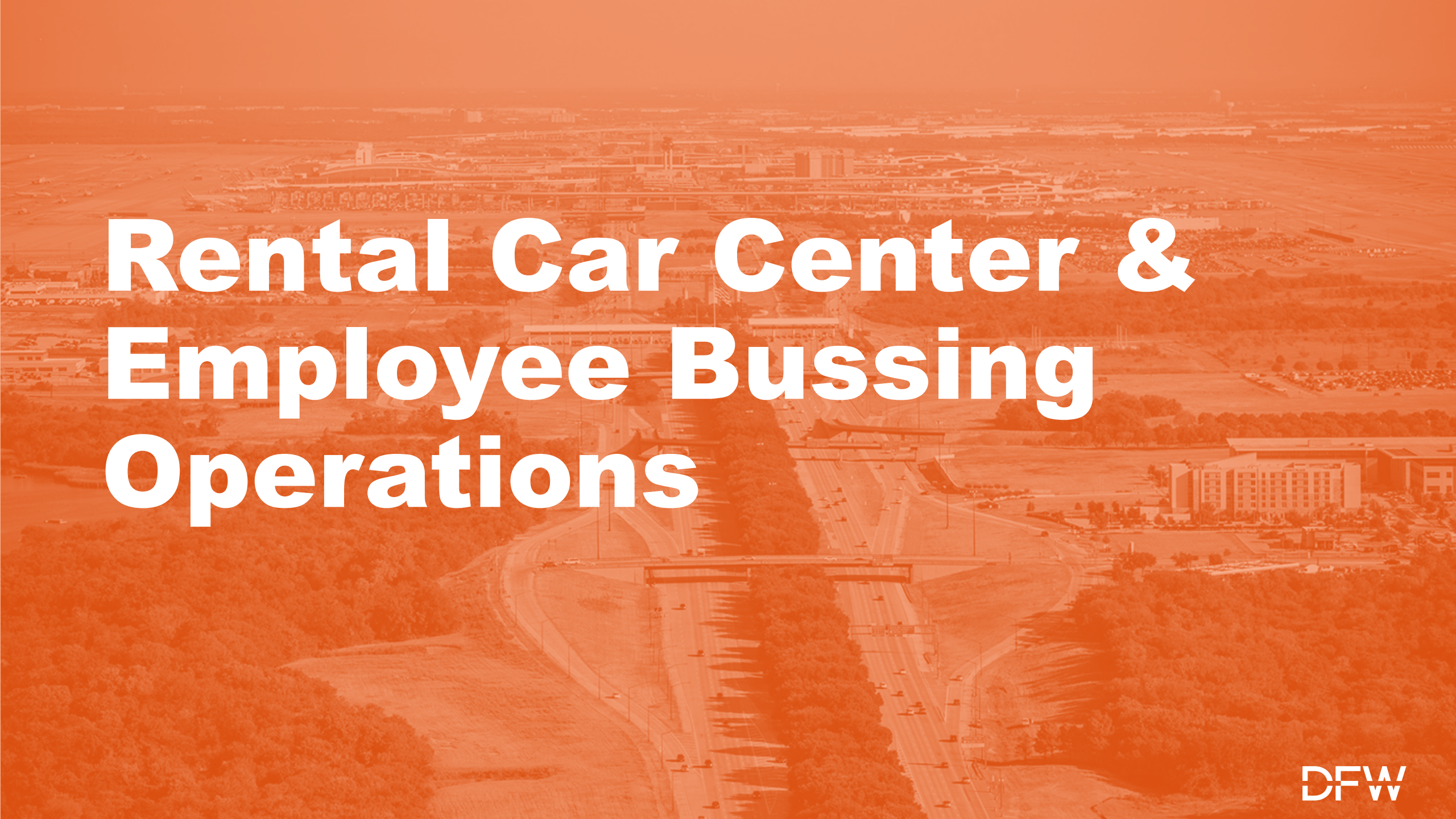


17.7M vehicles utilize curbside

Public Parking

36K parking spaces





Rental Car Center & Employee Bussing Operations

DFW



Rental Car Center Bussing Operations

- 6.4M FY2026 Total ridership (up +4.9% YOY)
- Fleet size: 59 buses
- 7-minute actual headways

8.79
Customer Satisfaction Survey Score

96%
Mystery Shopper Score

Rental Car Bus Purchase



Received **eight** Battery Electric Buses (BEB) in FY26



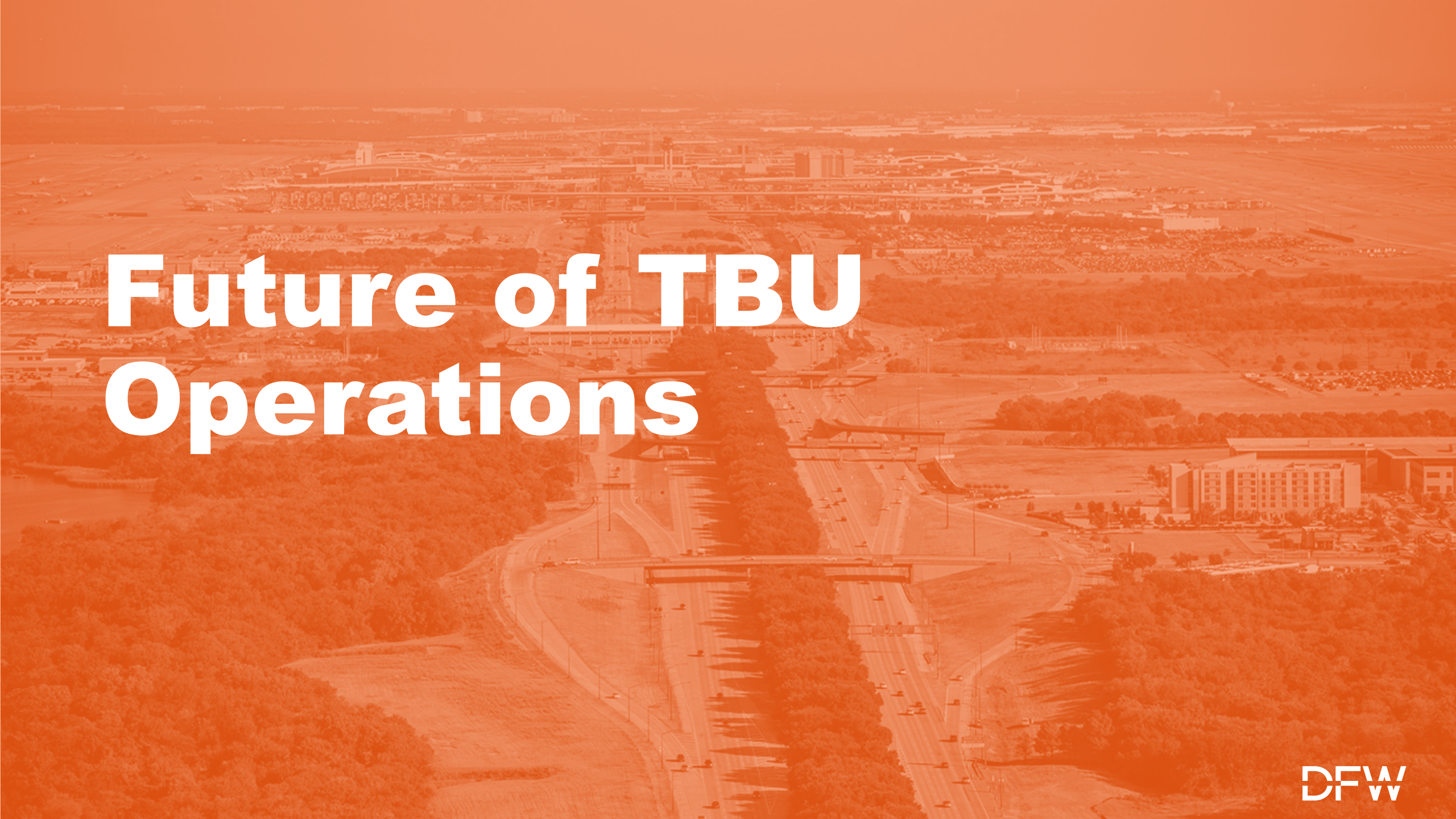
Employee Bussing Operations

- 5.9M FY2026 Total ridership (up +13% YOY)
- Fleet size: 49 buses
- 6.5-minute actual headways

7.86
Customer Satisfaction Survey Score

Highest score ever!

97%
Mystery Shopper Score



Future of TBU Operations

Consolidated Bussing Contract



Previous Model











Five services managed by two operators

New Model



Five services unified under one operator with one flexible fleet



Overall Transition - Timeline

June 2026

New consolidated bus operator to be identified and approved

Jul – Sep 2026

Transition period to new operator

October 2026

Full landside bussing operation will be under new operator

Oct 2026 – Mar 2027

New operator will maintain the current system and routes to learn DFW environment

Jan – Mar 2027

DFW Team and Framna to gain access to ETA test lab to start Phase 1

Estimated timeline. Specific timing and implementation details remain subject to planning and decisions.

Open Road Environment





Vision

New gateless access control system and safer roadway environment

Free flow access

No gates, no stopping, no queues, reduced congestion on International Parkway.

Modern experience

Smooth, fast, digital-first travel.



A Multi-Year Initiative

2026

Planning

Technology selection and future operating model planning

2027

Onboarding

Of the selected technology solution

2028

Phase 1 Launch

2 non-stop lanes + existing credit card lanes (hybrid plaza)

2029

Phase 2 ORE

Transition to full open road experience

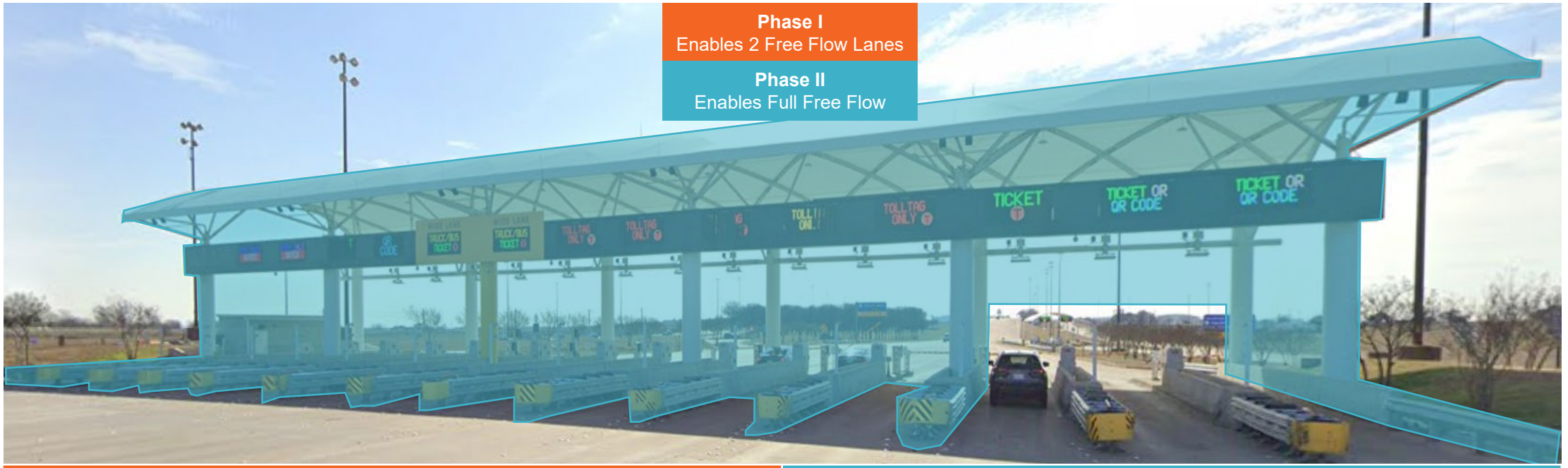
2030

Phase 3

Complete infrastructure and corridor improvements

Estimated timeline. Specific timing and implementation details remain subject to planning and decisions.

Phasing



Phase I	Phase II
• Concrete barriers • Steel guard rail system • Steel bollards • Access fee collection equipment and supporting infrastructure	• Concrete barriers • Steel guard rail system • Steel bollards • Access fee collection equipment • Overhead canopy and supporting structure • Digital display system • Pavement

Future State



Source: DFW Digital Assets



From Curb to Gate:
KEEPING DFW MOVING

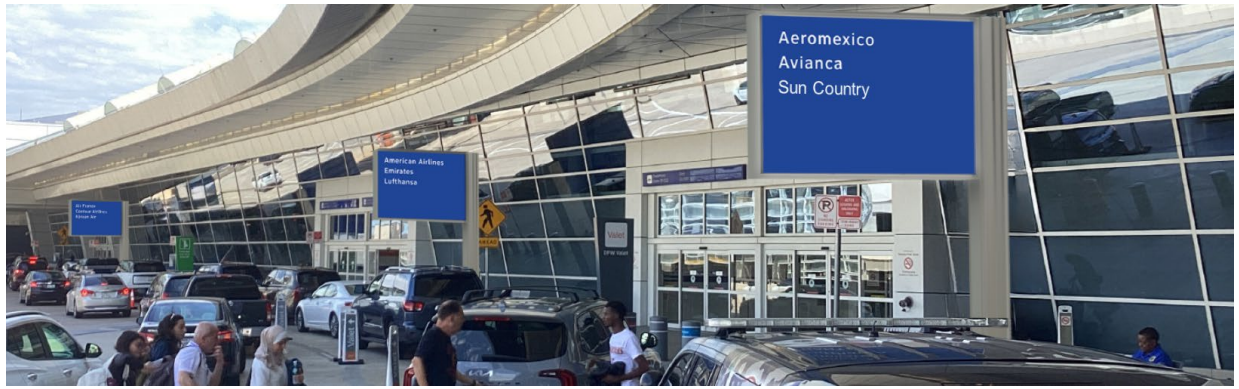
MEGAN BOZARTH, AVP CUSTOMER EXPERIENCE

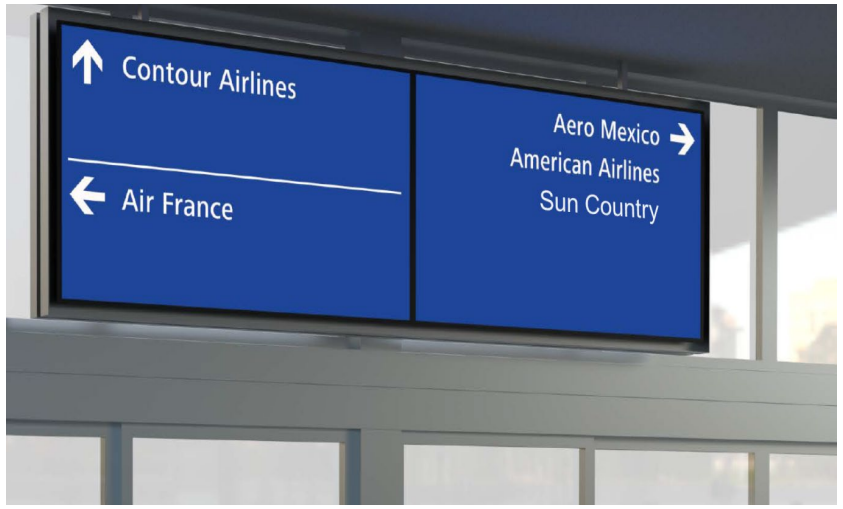
DFW

Terminal D Digital Curbside and Directories

- Modernizes Terminal D signage with dynamic digital displays at the curbside, vestibules, check-in

- Keep Customers Moving:
  - Real-time airline information improves wayfinding from curb through check-in









Self Service Bag Drop (SSBD)

- New self service check in and bag drop equipment being installed in Terminal D, may expand to other terminals

- Keep Customers Moving:
  - Improves check in processing times
  - Reduces wait times

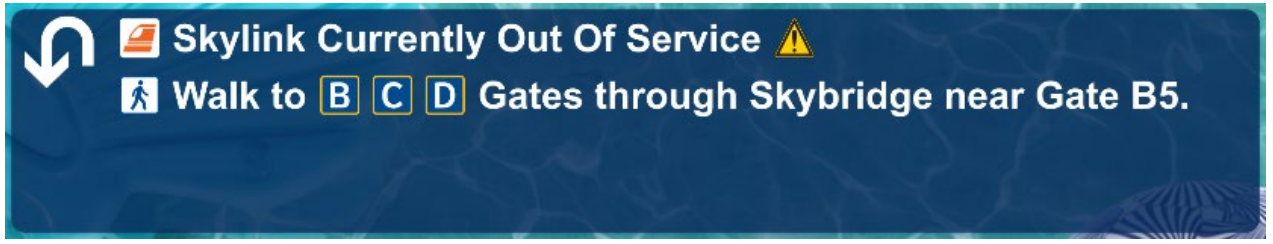




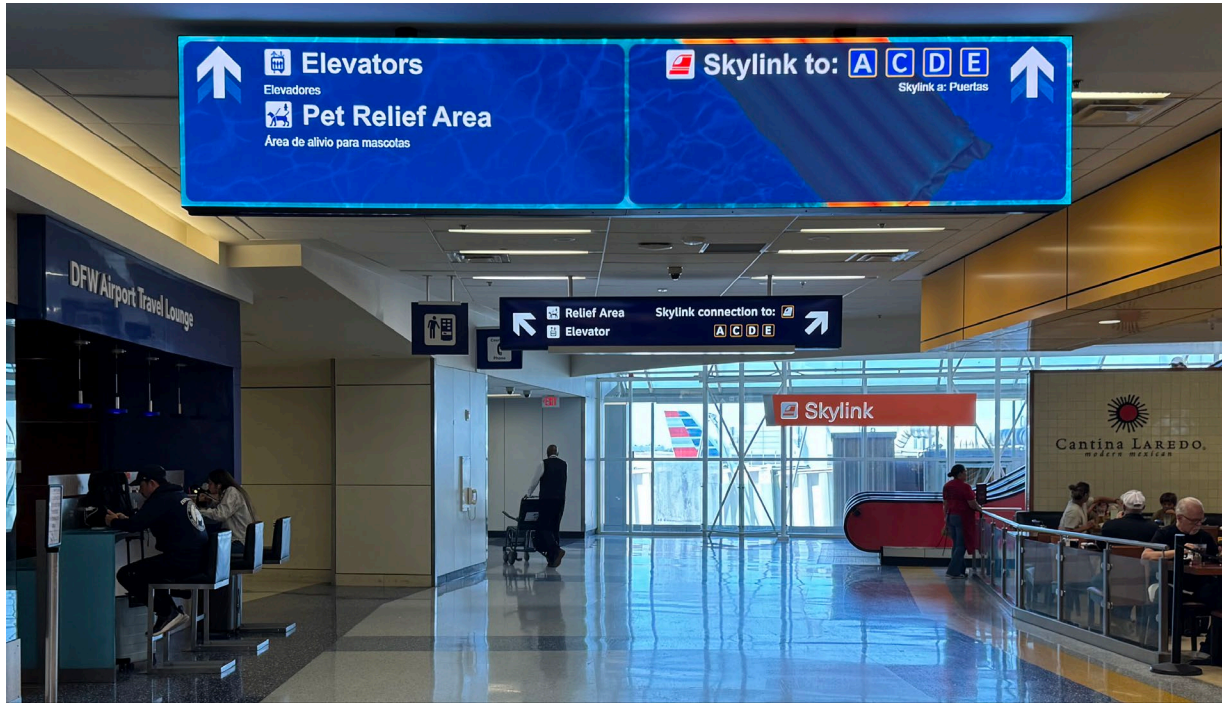


Digital Signs for Skylink

- New digital signage installed in terminal concourse right before Skylink stations to assist customer wayfinding during irregular operations
- Installation near complete in all terminal except Terminal C
- Keep Customers Moving:
  - Provides advance notification during outages so customers can make their own decision about their journey







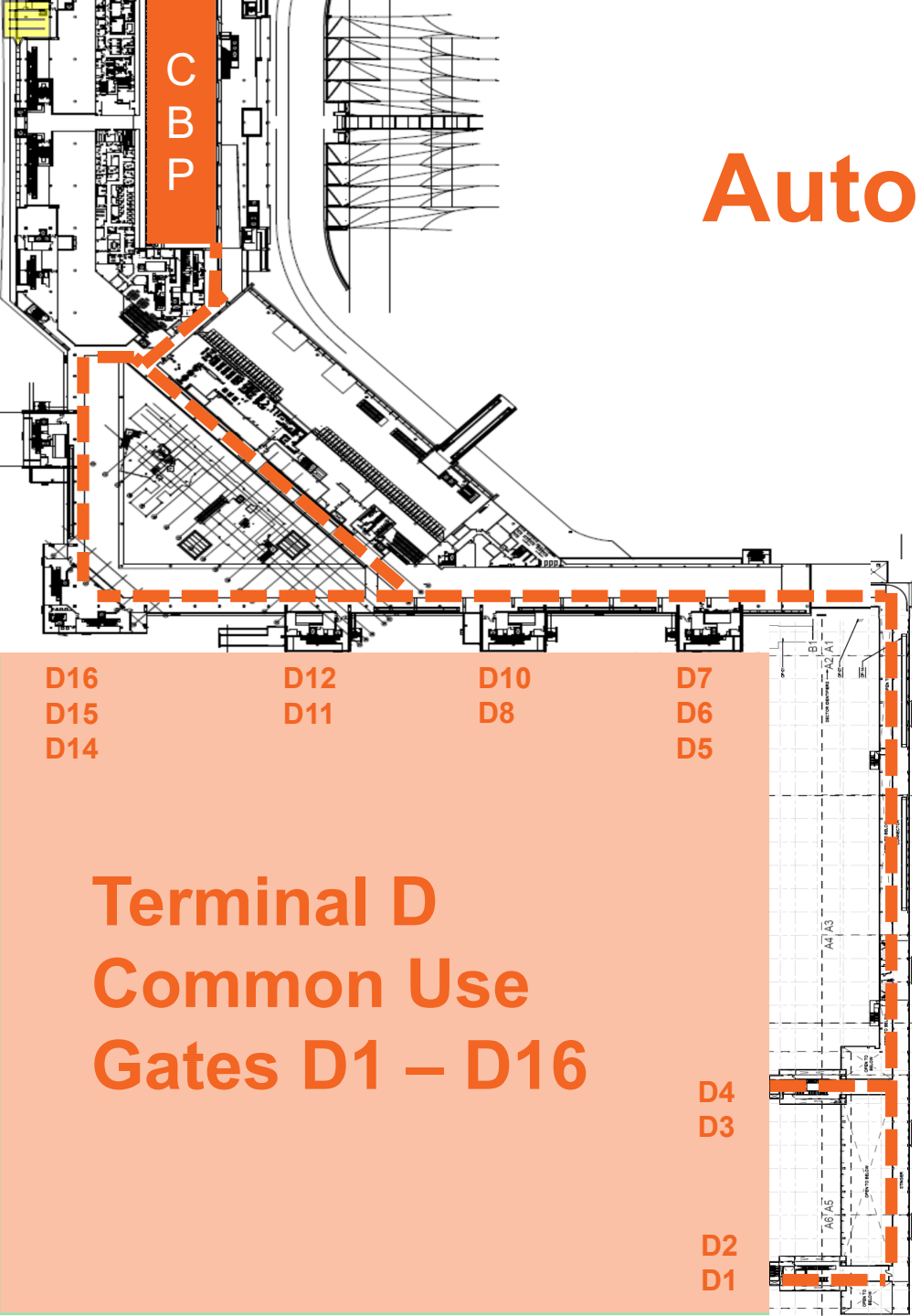




Info Nodes of the Future & FIDS Replacement

- As part of a multi-year Info Nodes of the Future initiative, DFW is modernizing FIDS and wayfinding infrastructure.
  - New “Info Nodes of the Future” designs deployed in future construction/renovations
  - Replace all existing FIDS throughout the airport
- Keep Customers Moving:
  - Improved real-time flight information and visibility
  - Interactive maps enhances ability to find amenities in the terminals

Autonomous Wheelchair Services



Terminal D
Common Use
Gates D1 – D16

- Deploy autonomous wheelchairs to supplement mobility services in International Arrivals
- Keep Customers Moving:
  - Reduces wait times for wheelchair assistance
  - Improves accessibility and passenger independence
  - Supports growing demand for mobility services

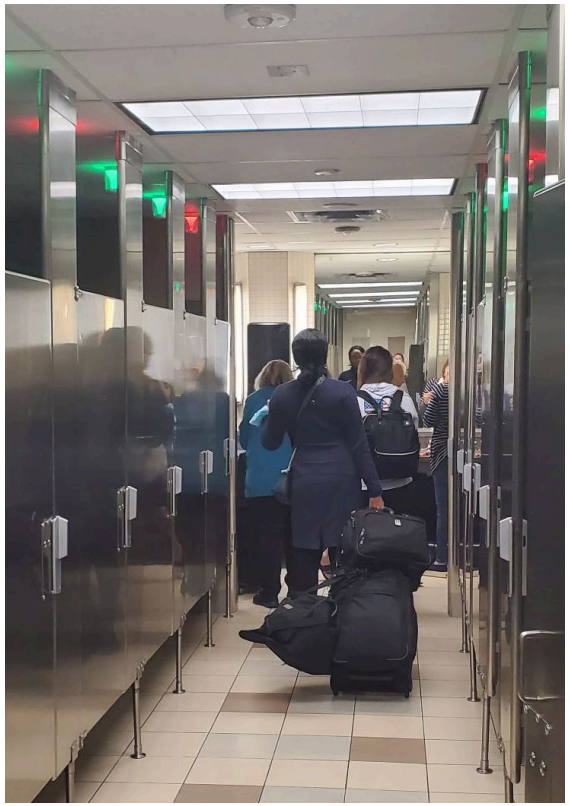




Restroom Modernization Program

- Modernizes restrooms across terminals to ensure consistent design, capacity, accessibility, and reliability.

- Keep Customers Moving:
  - Reviews restroom sizing to ensure proper sizing and fixture capacity to support terminal operations.
  - Enhances customer experience through improved fixtures, layouts, finishes, and long-term maintainability.



Prior Design



Newly Renovated



Sensory Rooms

- DFW opened its first Sensory Room in Terminal D, with two more planned in Terminals A & C before Thanksgiving
- Keep Customers Moving:
  - Provides safe, calming, ADA-compliant spaces that support travelers with neurodiverse needs.
  - Enhances accessibility through specialized lighting, furniture, fixtures, signage, and coordinated operational protocols.

#OneDFW

- Expand on DFW's mission to "inspire our employees" by encouraging demonstrated passion for the customer experience.

- Keep Customers Moving:
  - Continued recognition of employees who go above and beyond for our customers creates a customer-centric culture



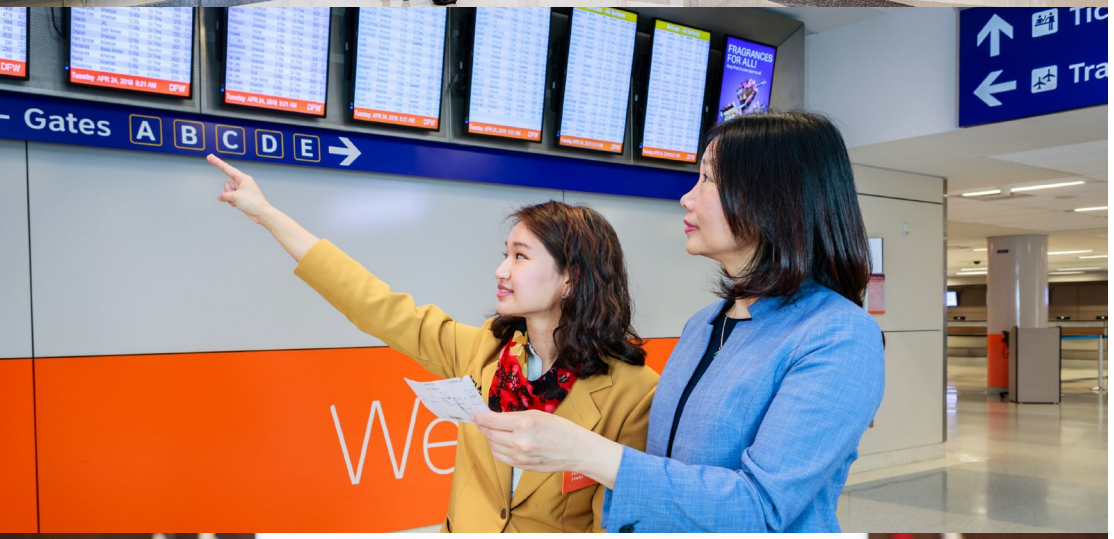












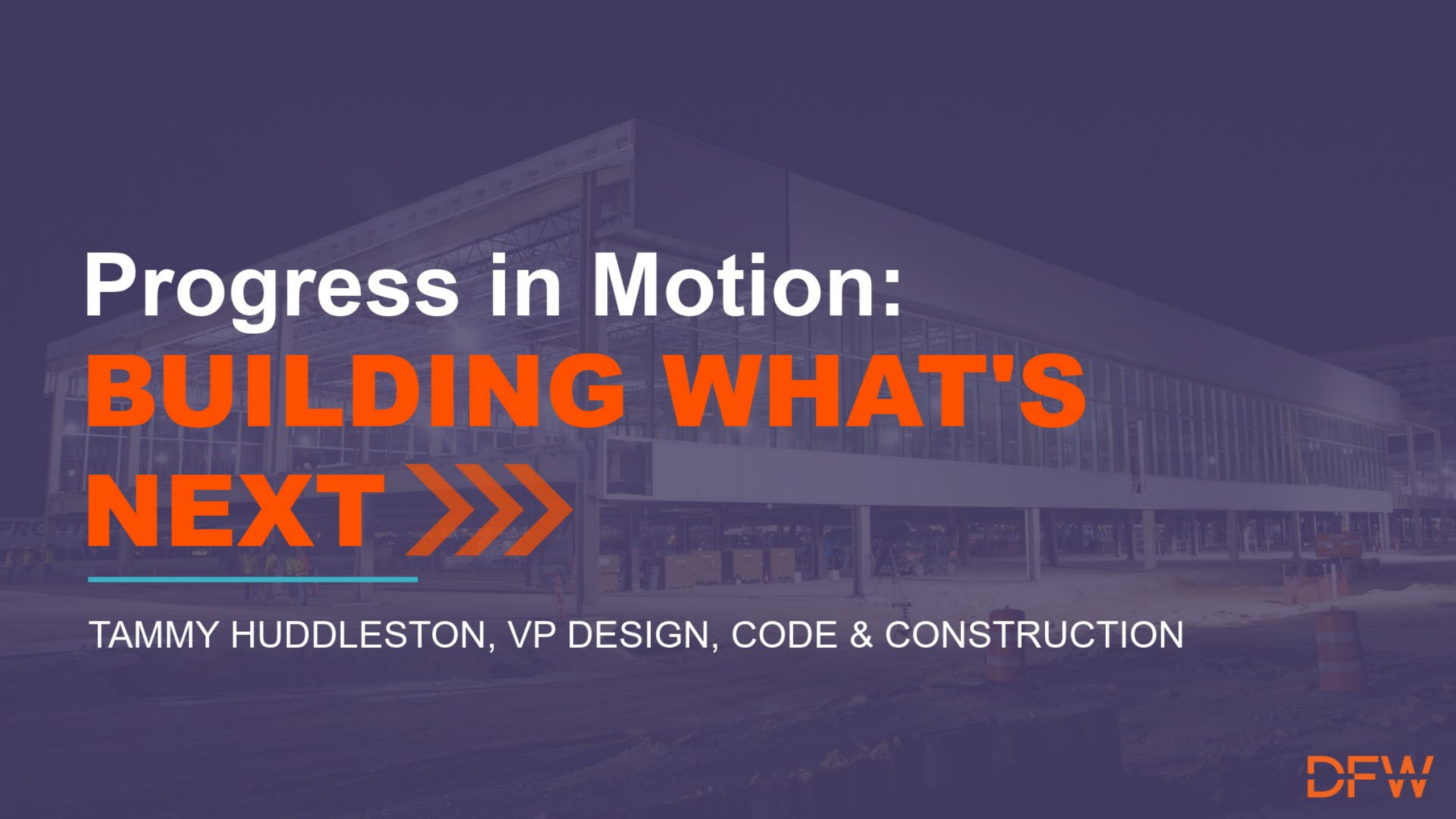


ACI CX Level 4 Accreditation

Overview

- Airport-wide customer experience accreditation
- Focuses on engagement, collaboration and continuous improvement for the benefit of our customers
- Level 3 of 5 achieved
- Targeting Level 4 submission in 2027

- Keep Customers Moving:
  - Improves consistency in the customer journey
  - Positions DFW Airport as a global CX leader, which emphasizes the focus on our customer



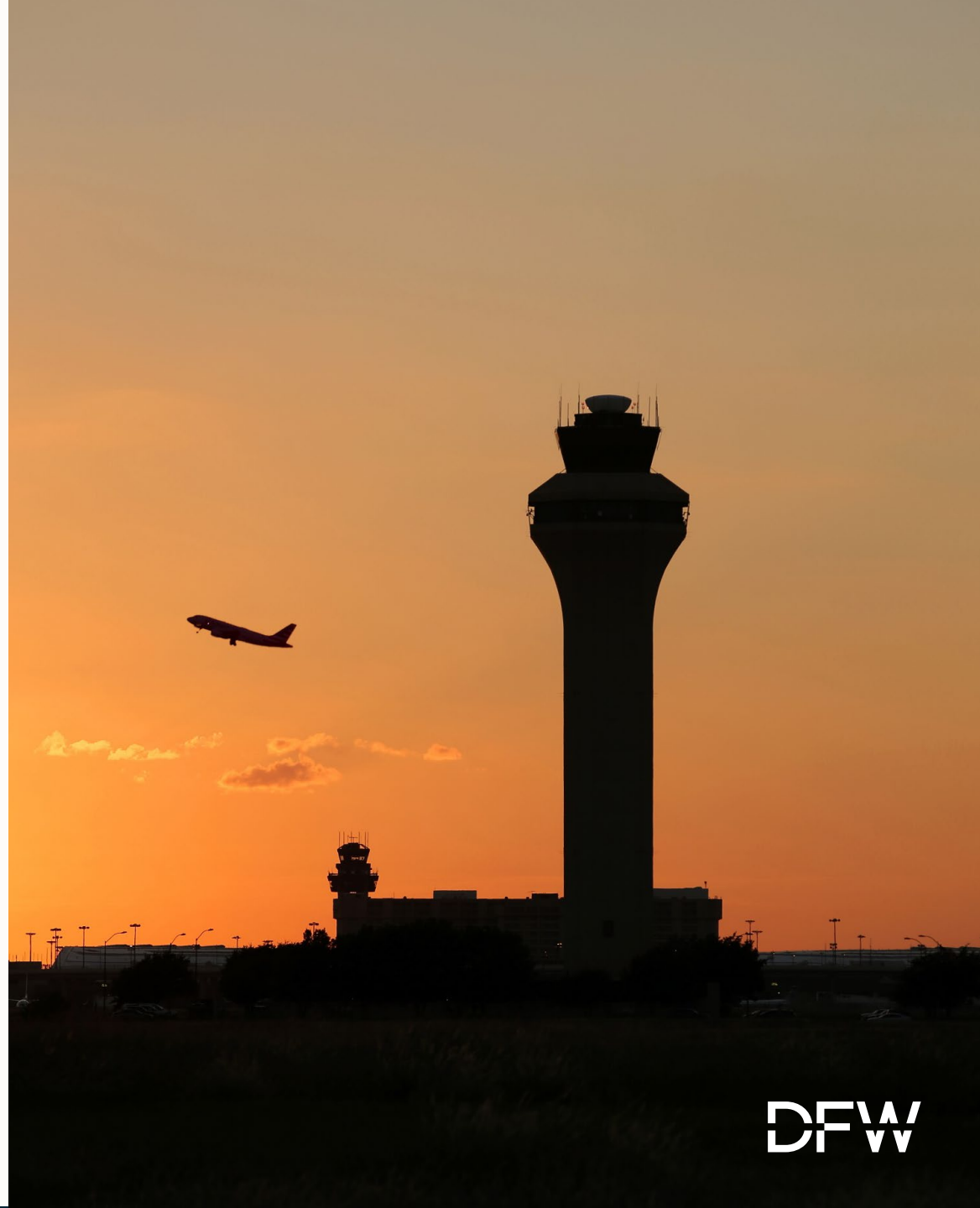
Progress in Motion:
BUILDING WHAT'S NEXT

TAMMY HUDDLESTON, VP DESIGN, CODE & CONSTRUCTION

DFW

KEY PROJECTS

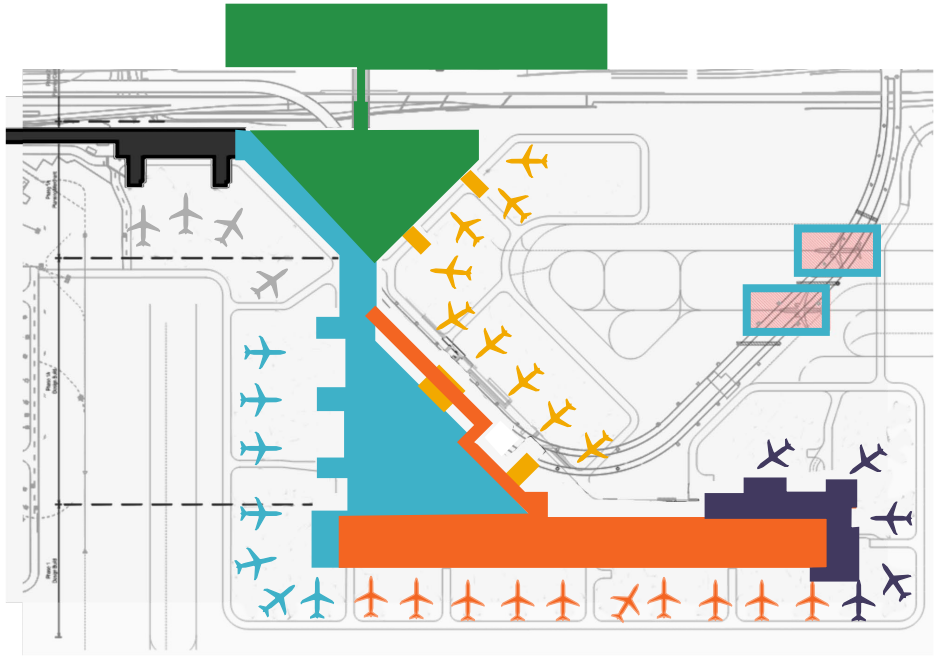
- Terminal F
- Terminal C Redevelopment
- Terminal A Pier Expansion
- International Parkway Modernization

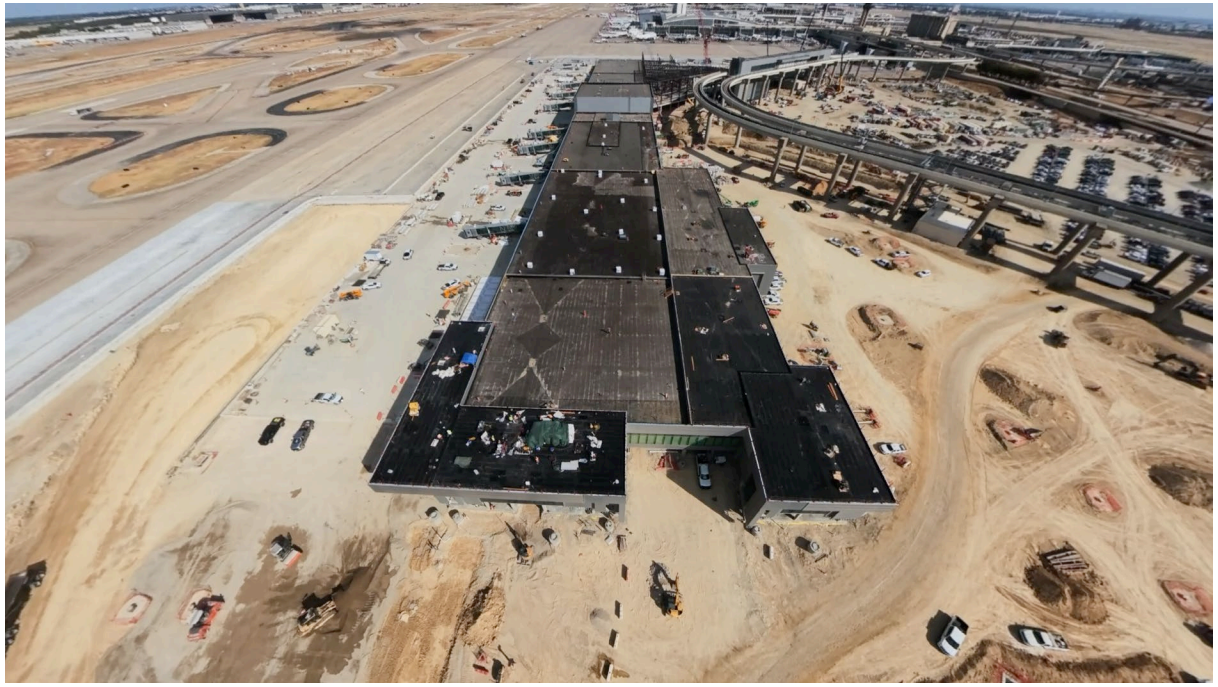


N

TERMINAL F PHASE 1

Designer: **PGAL, Gensler & GFT Architects** | Contractor: **Innovation Next +**







- **Phase 1 | 10 Gates** (Anticipated Completion Summer 2027)
- **Phase 1 | 5 Gates** (15 Total) (Anticipated Completion Q4 2027)
- **Phase 1A | 7 Gates** (22 Total) (Anticipated Completion Q3 2028)
- **Phase 2 | Processor and Garage** (Anticipated Completion Q3 2030)
- **Phase 2 | 9 Gates** (31 Total) (Anticipated Completion Q1 2031)



TERMINAL C REDEVELOPMENT

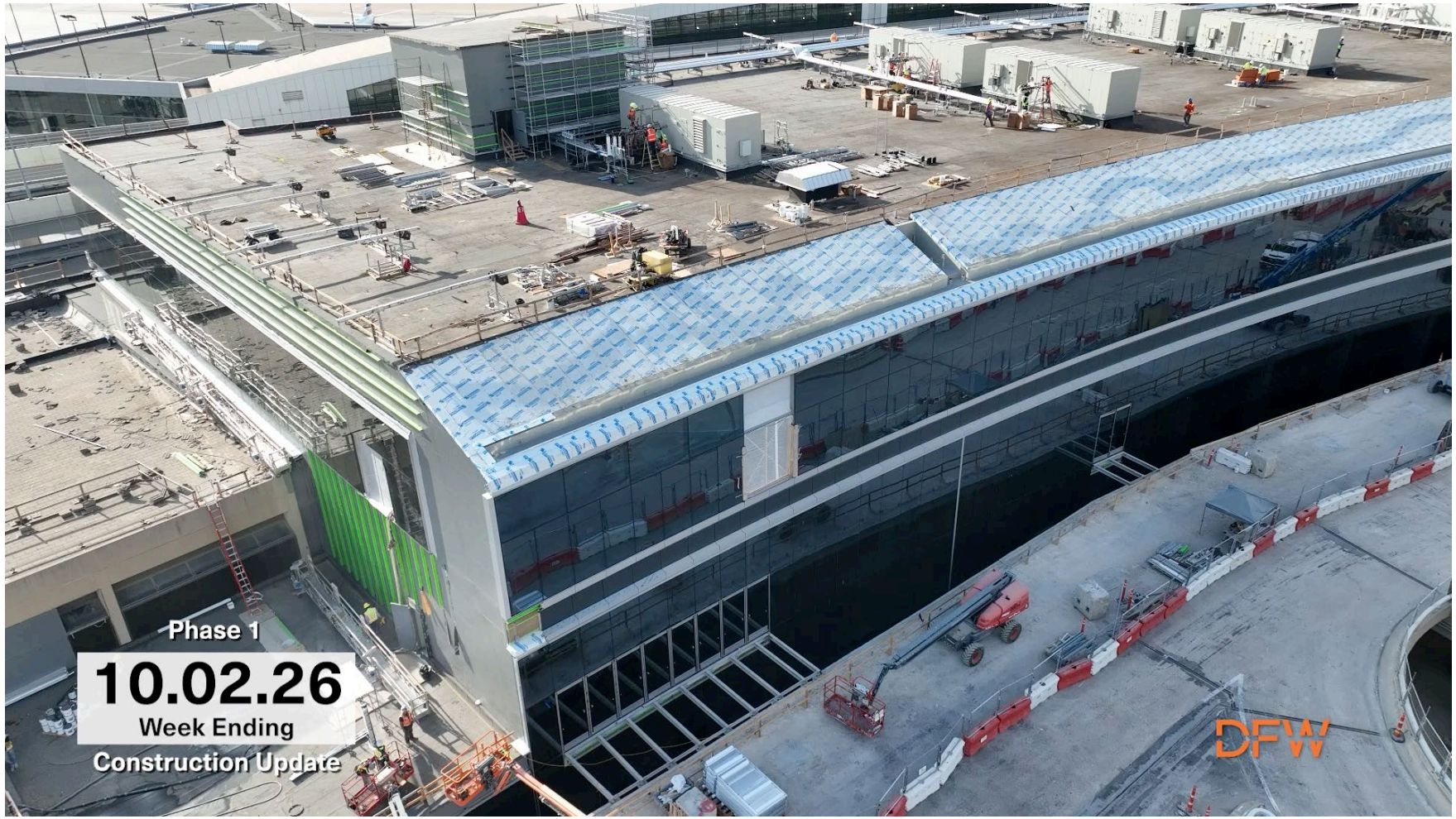
Phase 1

PROJECT DESCRIPTION

This project will transform Terminal C to modern terminal standards while achieving DFW's customer core needs and level of service. Work for this redevelopment will occur across multiple phases and will be synchronized with the Terminal C parking garages. The top two levels of the existing terminal will be demolished while preserving the ramp level and pre-existing baggage handling system.

KEY DATES

Start of Construction: **May, 2024** |
Anticipated Completion: **Q1 2027**

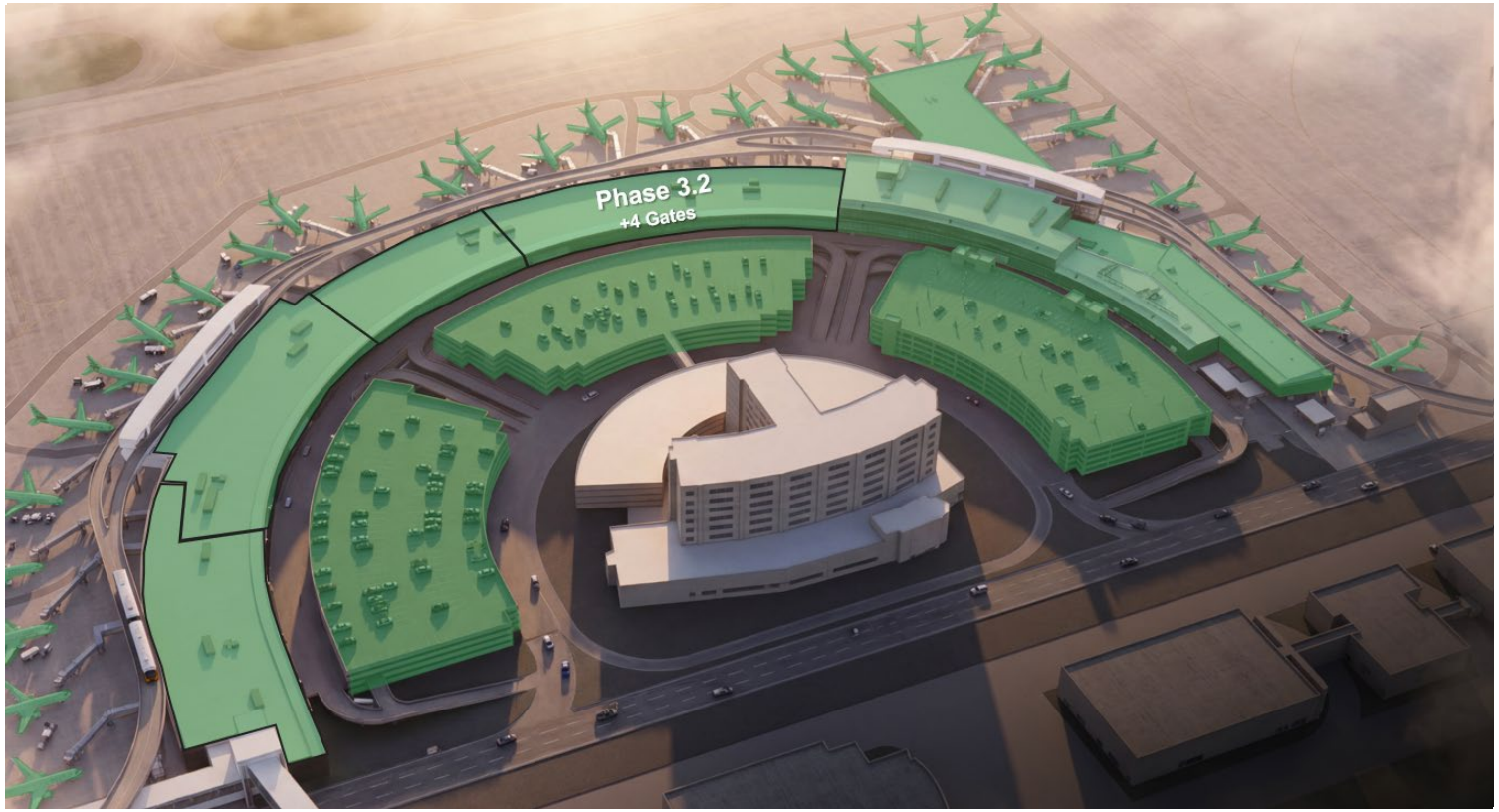


TERMINAL C REDEVELOPMENT

Phasing and Schedule

A streamlined, multi-phase approach designed to accelerate project delivery, improve construction efficiency, and minimize operational disruptions.

Q2 2026	Q4 2026	Q1 2027	Q4 2028	Q1 2029	Q3 2029



Original Phasing

46 MONTHS

Revised Phasing

35 MONTHS

11 MONTHS SAVED THROUGH OPTIMIZED PHASING

TERMINAL A PIER EXPANSION

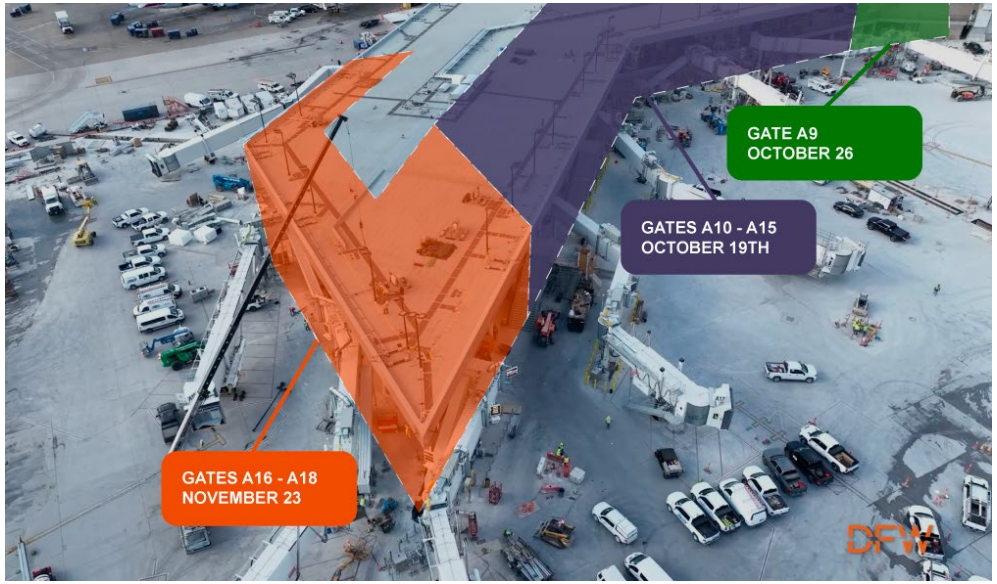
Designer: **HOK**
Contractor: **AAAJV(Austin Industries)**

PROJECT SCOPE & PURPOSE

This project will design and construct a pier extension at Terminal A as part of the Design Build contract. The expansion will add approximately 130,000 SF and 10 new gates, including a 5-gate increase at the North Skylink Station, with select areas of the existing terminal renovated as part of the work.

KEY DATES

START OF CONSTRUCTION	Q3 2024
COMPLETION	Q4 2026





LANDSIDE PROGRAM



INTERNATIONAL PARKWAY MODERNIZATION

Designer: **Jacobs** | Contractor: **Archer Western**

PROJECT SCOPE & PURPOSE

International Parkway Modernization replaces the 50+ year-old left-hand terminal flyovers with safer, more intuitive right-hand exits, improving customer safety and wayfinding.

PHASE 1

TERMINAL B	COMPLETE – OCT. ‘25
TERMINAL A	COMPLETE – DEC. ‘25
TERMINAL C	COMPLETE - MAY ‘26

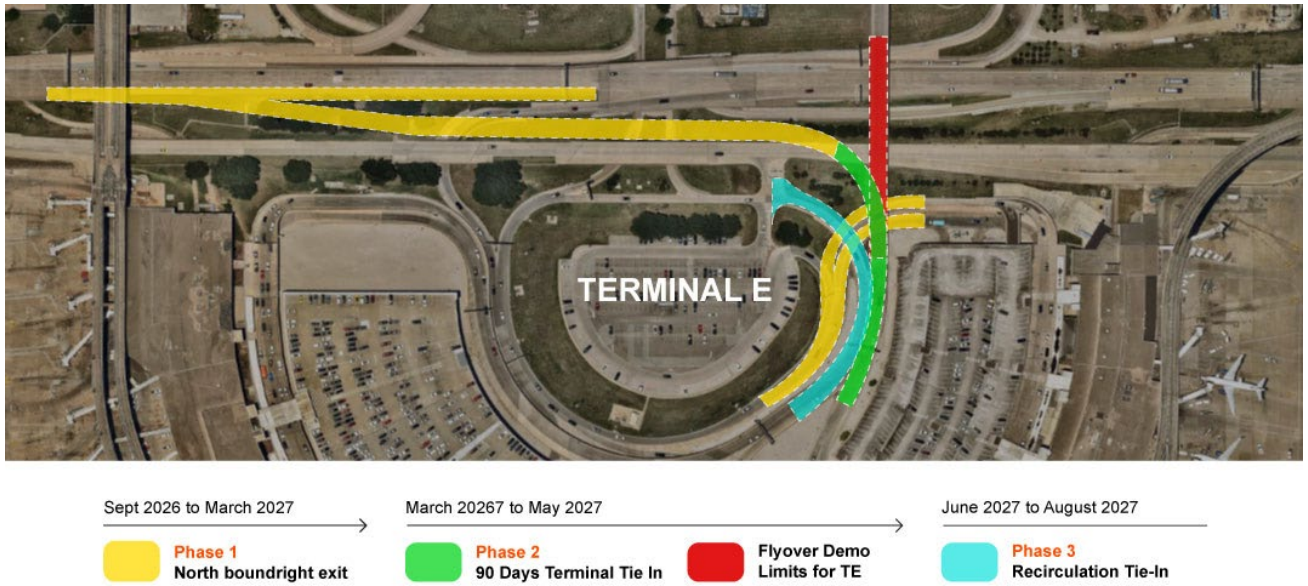
PHASE 2

TERMINAL E	Q3 2026 – Q3 2027

Design complete; construction underway, including bridge substructure work and Automated People Mover demolition.

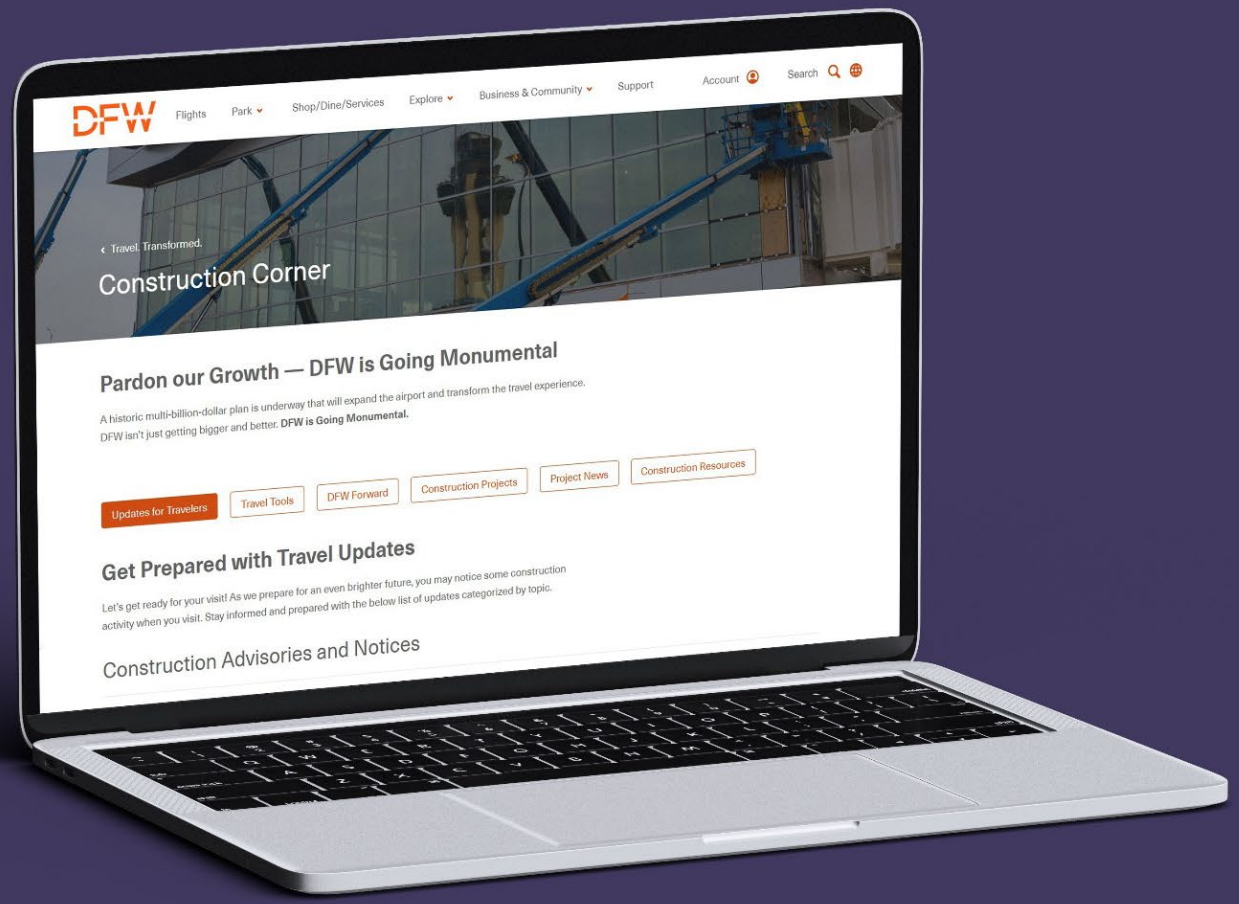
Phasing is planned to minimize impacts during Spring Break.





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- Tools to Navigate Construction
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dfwairport.com/construction

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SAVE THE DATE

BUSINESS OPPORTUNITY FORUM

Wednesday, November 11, 2026
8 am – Noon
AMC Theater - Grapevine Mills Mall
3150 Grapevine Mills Parkway, Grapevine, Texas 76051

DFW


THANK YOU!
Travel. Transformed.

Update:
BUSINESS DEVELOPMENT

TAMELA LEE, VP BUSINESS DEVELOPMENT



Forward Together:
THE MOMENTUM IS OURS

KEN BUCHANAN, EVP & CHIEF REVENUE OFFICER

DFW


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THANK YOU
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