

GAME TIME READY

The Concession Playbook

Preparing for Summer. Scaling for FIFA. Positioned for CRDC.



May 2026

DFW

AGENDA

Welcome to the Field Zenola Campbell

Playing to Win Naveen Bandla
Donnell Harvey
Raymond Mensah

FIFA World Cup Ingram Brown

Capital Improvement Game Plan Fabian Cornelious

The Concession Playbook Zenola Campbell

The Logistics Play That Changes the Game Zenola Campbell

Closing Remarks Ken Buchanan



A soccer ball with black and white hexagonal panels sits on a lush green grass field. In the background, a large stadium is filled with spectators, and bright floodlights illuminate the scene from above, creating a dramatic atmosphere. The text "Welcome to the Field" is centered in the upper half of the image.

Welcome to the Field

A soccer player in a white kit is captured mid-kick, with the ball in the air. The background shows a large, blurred crowd of spectators in a stadium. The text "Summer Readiness Playing to Win" is overlaid in white, bold, sans-serif font.

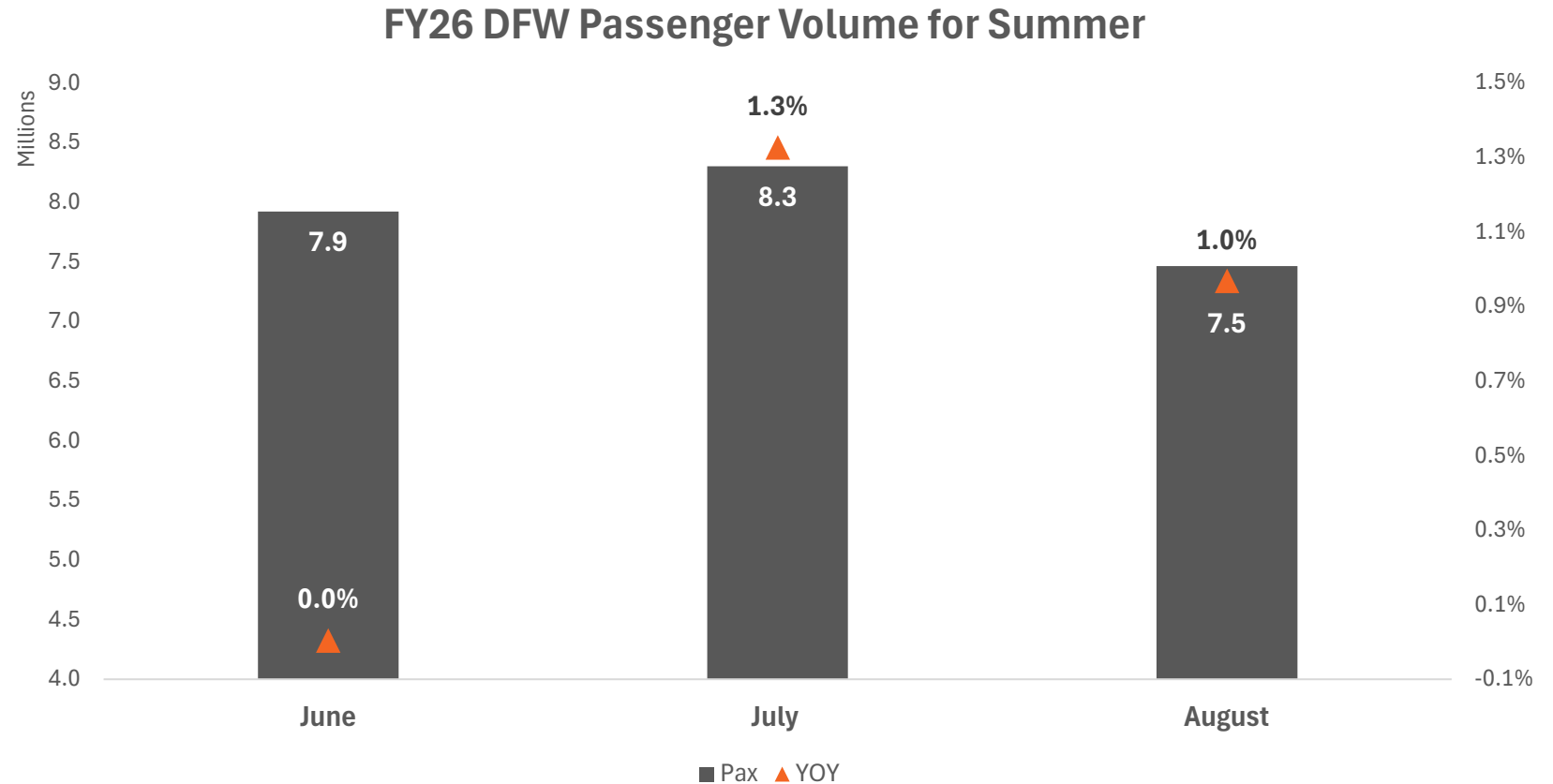
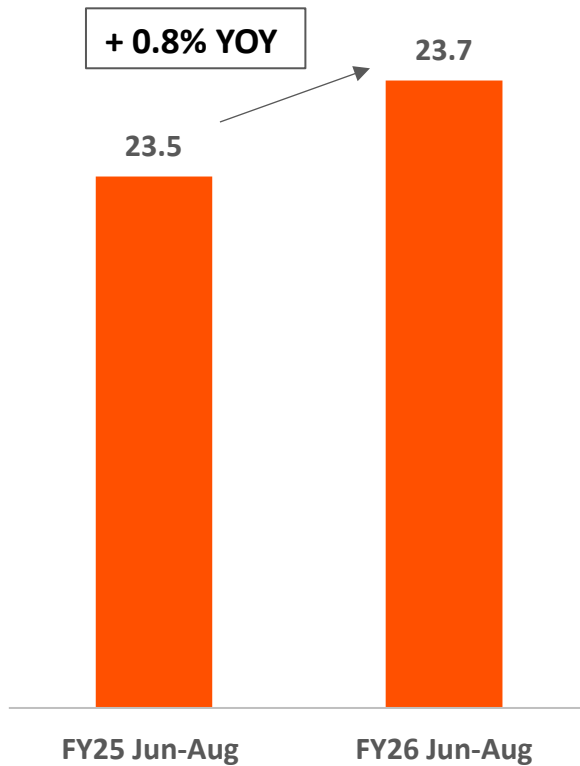
Summer Readiness Playing to Win

Passenger Projections

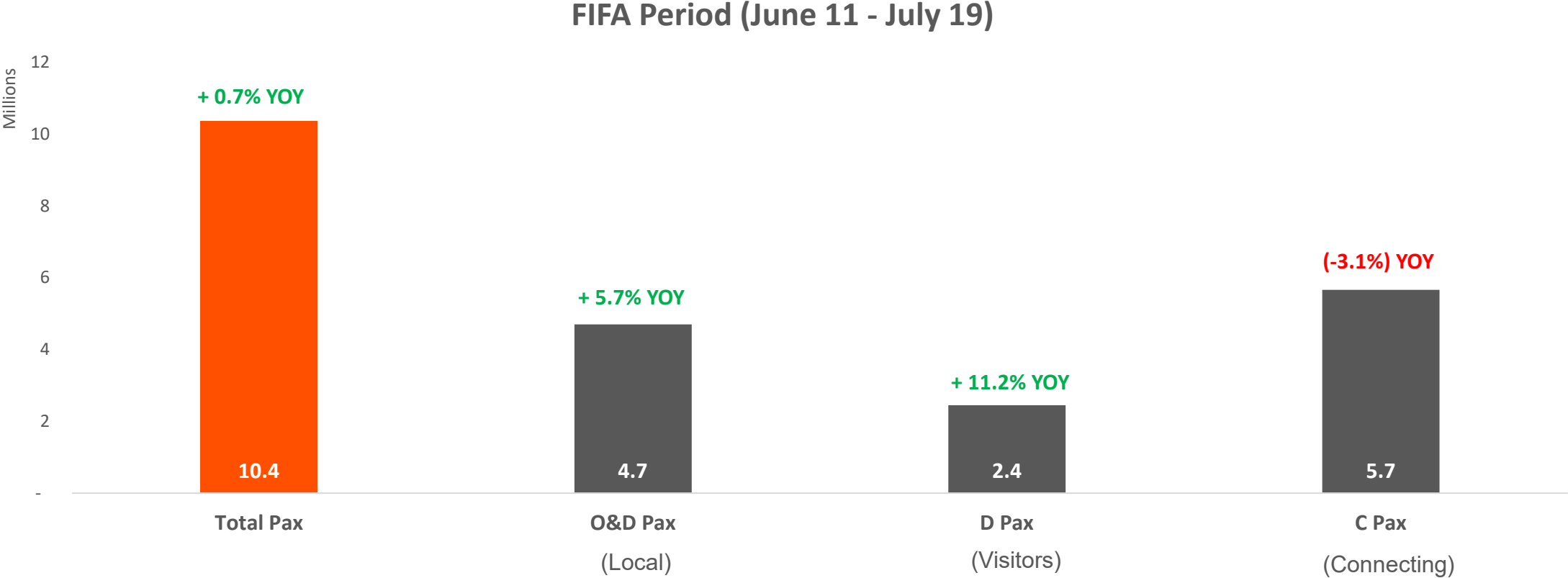
Naveen Bandla



DFW summer passenger volumes are expected to reach 23.7M, up 0.8% YOY

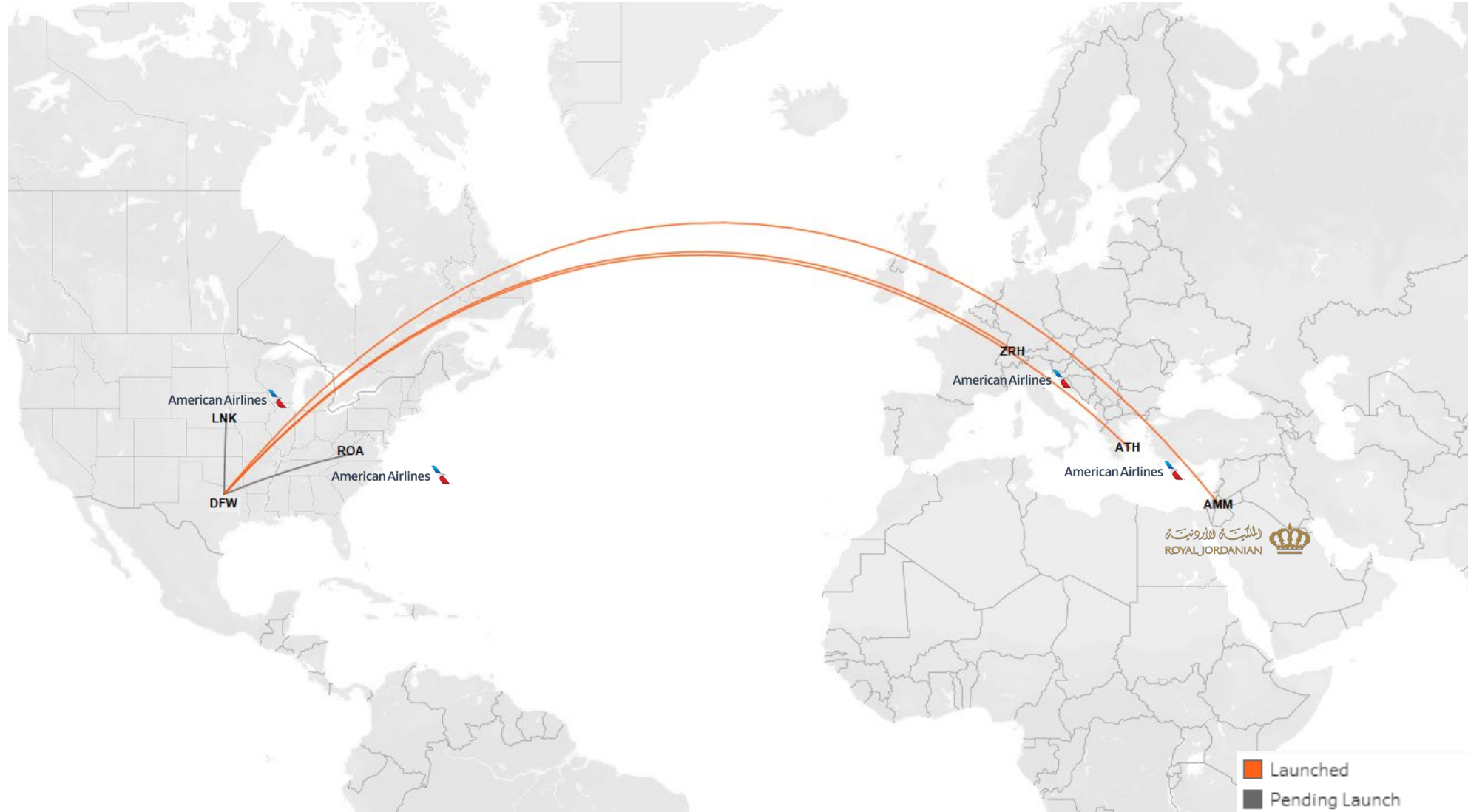


During FIFA, visitors are expected to grow significantly, while overall pax grows marginally

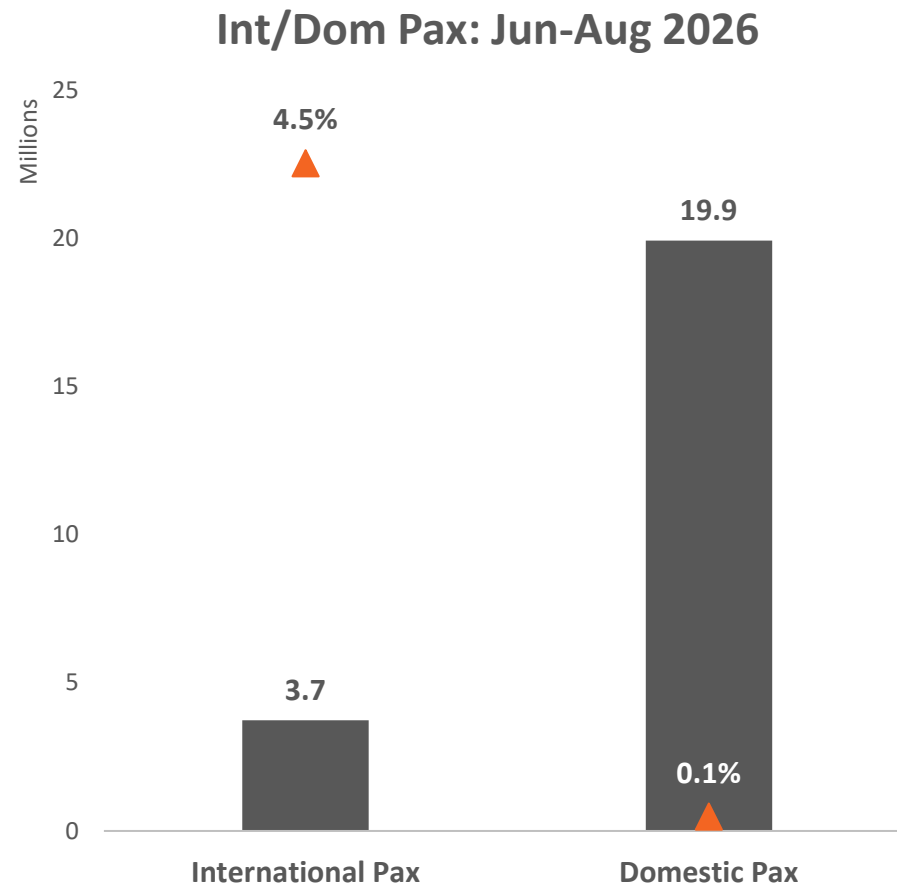




5 new destinations are launching this summer



International pax are expected to grow 4.5% YOY, while domestic stays flat



Airline Strategy & Concession Impact

Donnell Harvey



AA Schedule Highlights

Summer 2026 Highlights

June 2026

Overall Peak Day Activity (vs. May 2H 2026 and June 2025)

Total departures: 929 (+3 MoM, -7 YoY)

Mainline: 572 (-3 MoM, +4 YoY)

Regional: 357 (+6 MoM, -11 YoY)

Minor departure cuts on Tuesday, Wednesday, and Saturday 13-bank days:

Tuesdays: -6%

Wednesdays: -5%

Saturdays: -2%

Day of Week Schedule Structure

The 13-bank structure operates on all days of week in the July schedule period. There are no days of week with bank cancels.

July 2026

Overall Peak Day Activity (vs. June 2026 and July 2025)

Total departures: 936 (+2 MoM, -2 YoY)

Mainline: 571 (+2 MoM, +4 YoY)

Regional: 365 (flat MoM, -6 YoY)

Minor departure cuts on Tuesday, Wednesday, and Saturday 13-bank days:

Tuesdays: -6%

Wednesdays: -5%

Saturdays: -2%

Friday 7/3: No Bank 13 (22:00 departure)

Saturday 7/4: No bank 11-13 (after 19:00)

Day of Week Schedule Structure

The 13-bank structure operates on all days of week in the July schedule period. There are no days of week with bank cancels.

August 2026

Total departures: 915 (-21 MoM, +23 YoY)

Mainline: 552 (-19 MoM, +13 YoY)

Regional: 363 (-2 MoM, +10 YoY)

Day of Week Schedule Structure

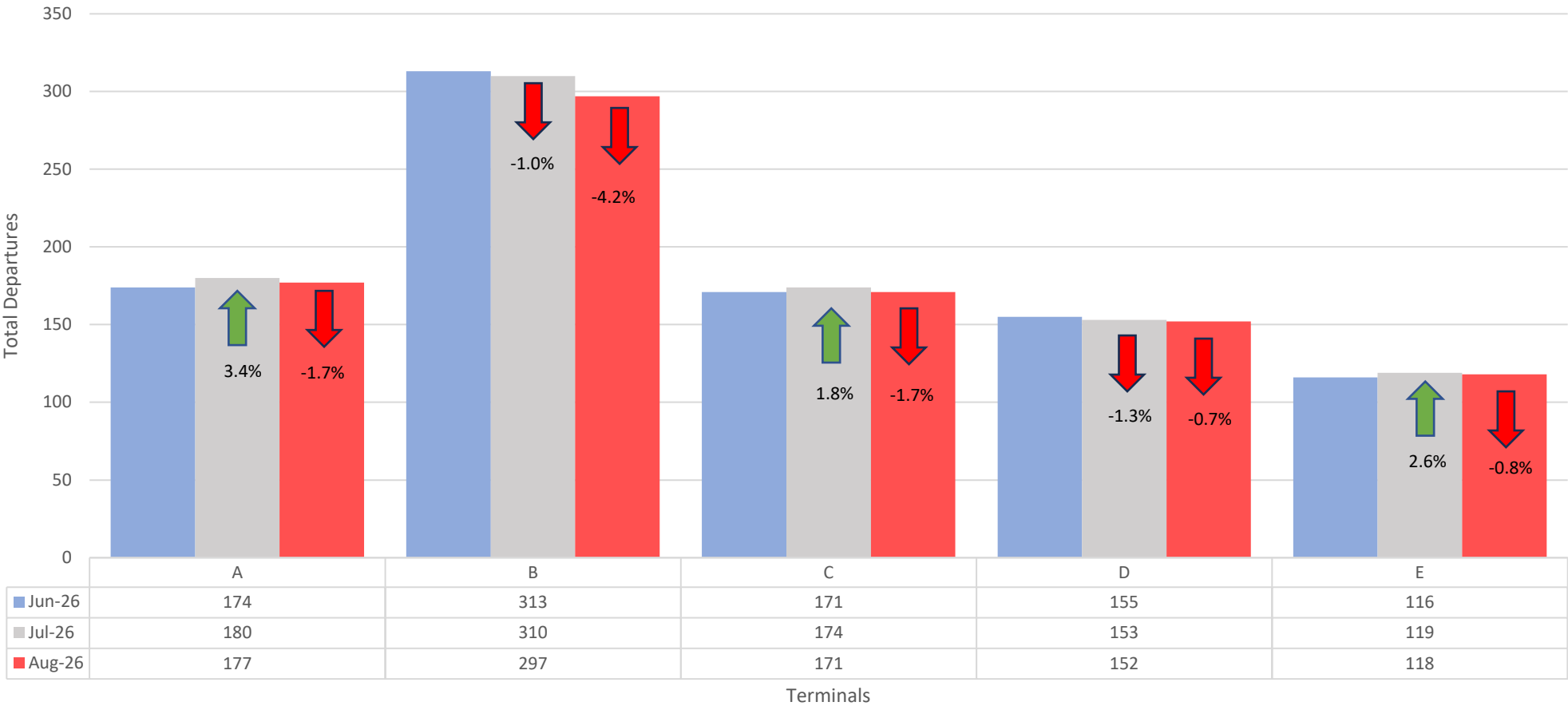
The peak-day 13-bank structure operates on Thursday and Sundays.

On all other days of week, DFW will operate a 12-bank structure (with the last bank of the day (13) cancelled).

Additional schedule cuts on Tuesdays/Wednesdays/Saturdays.

AA Schedule Highlights

AA Average Departures per Day



	Jun-26	Jul-26	Aug-26
AA Monthly Average Departure	929	936	915

Frontier Summer Operations

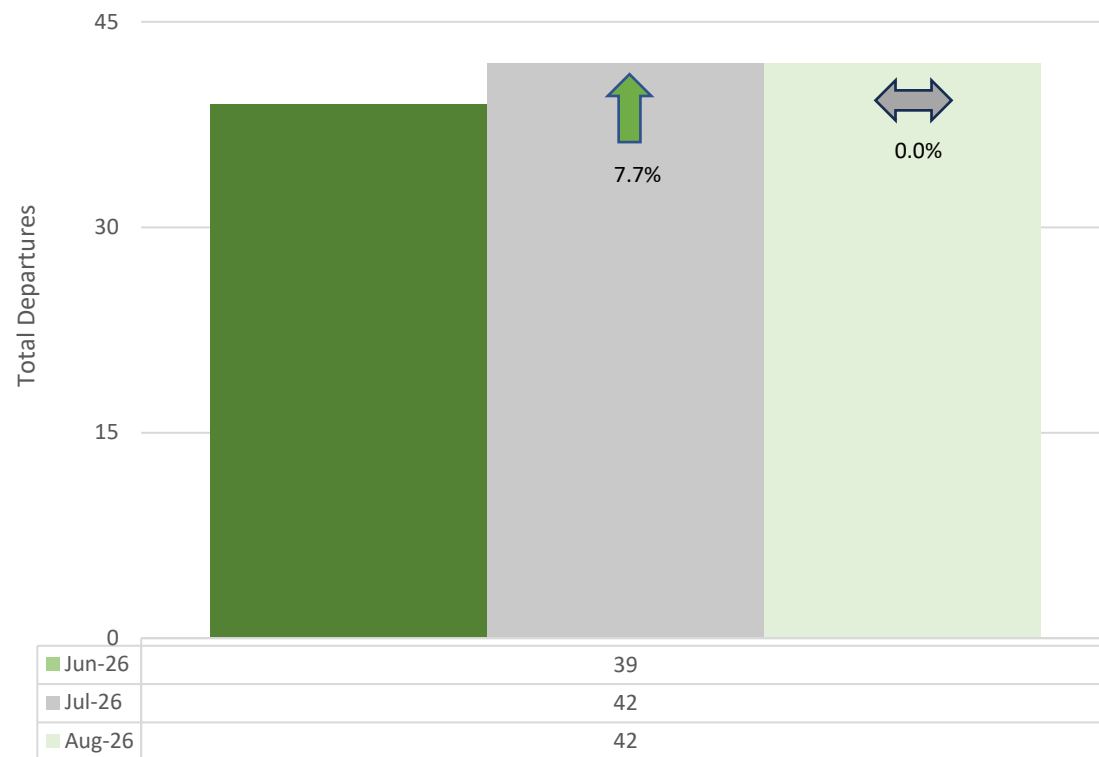
Summer 2026 Highlights

June – August 2026

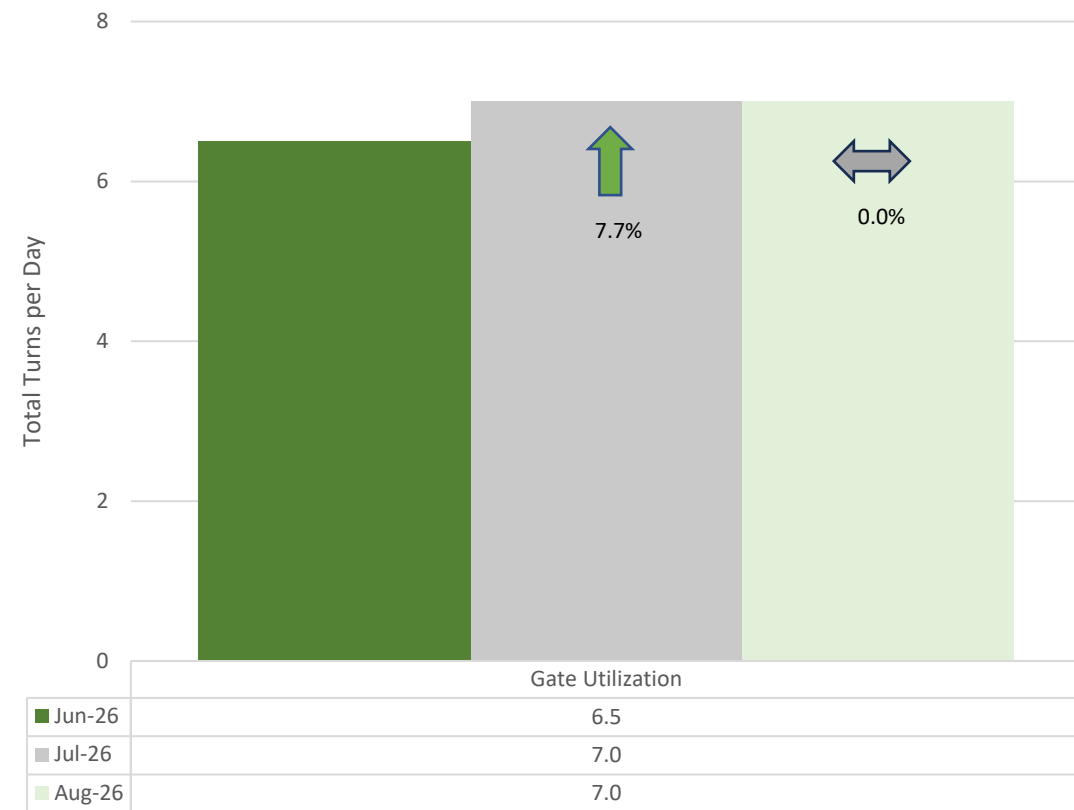
- **Operating from Gates 18, 20, 21, 31 under a permit.**
- **Scheduled operations will occur on E32 short term.**
- **Average DFW departure count ~40.**
- Peak day as published is 43, low day is 38 (Jun overall +51% YoY)
- Prior to any additional capacity **F9 is at 6.8 turns on 6 gates for peak summer**
 - (assumes 4 F9 pref gates + 2 NK gates).
- Moving ahead F9 will plan towards **7 turns/gate**
- *F9 emphasized the initiative to be more disciplined as an airline – not depending so heavily on common use gates for growth which causes the operation to fail, but growth supported through the assurance of preferential gates.*

Frontier Summer Operations

F9 Monthly Average Departures per Day

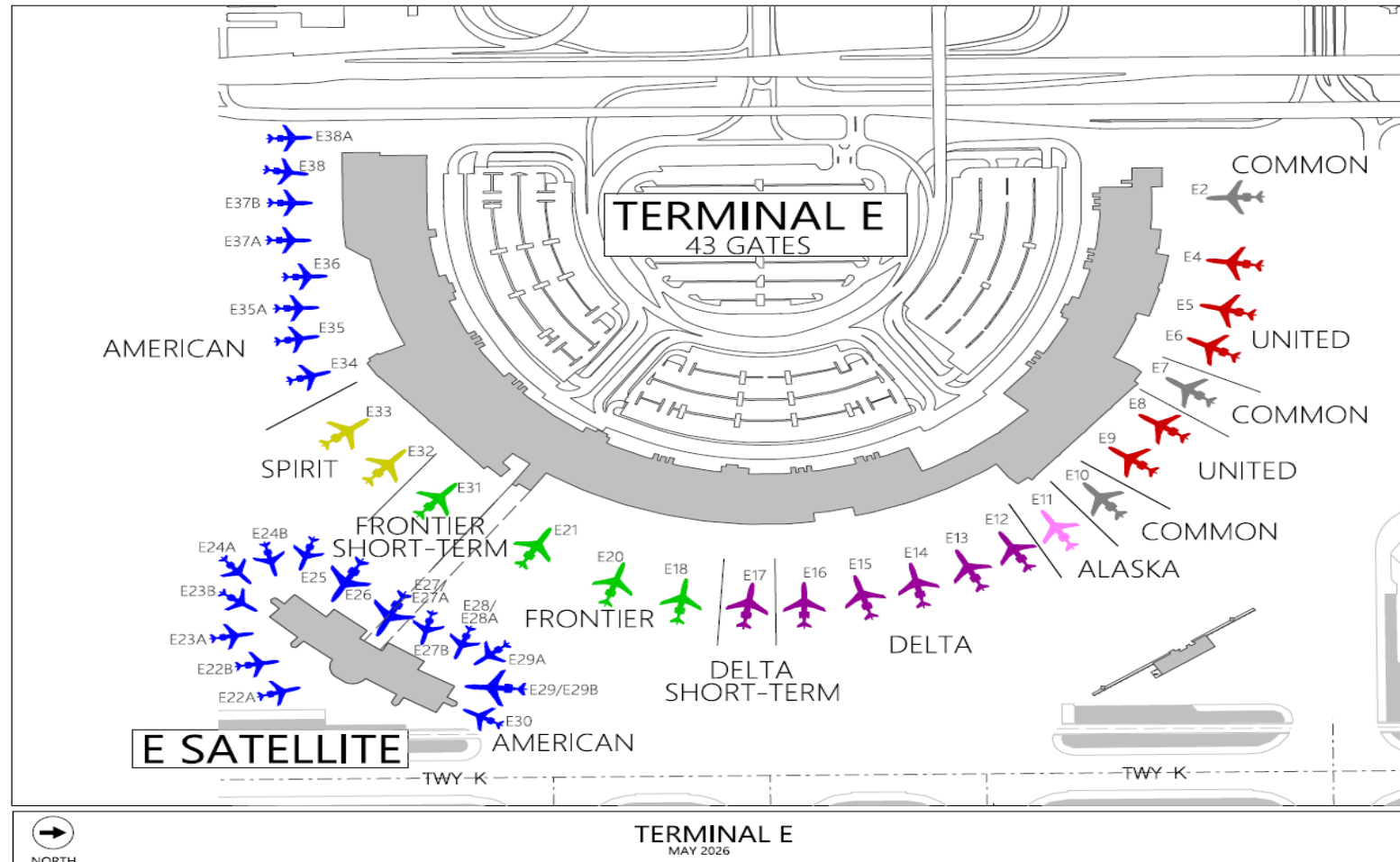


F9 Monthly Average Turns per Day



Terminal E

Summer 2026 Gate Assignments



Fan Charters – Confirmed Departures

Date	Airline	Flight Number	Destination	Departure Time	Passengers
June 16	KLM	KL673	AMS	7:30 PM	288
June 15	JAL	UNK	NRT	2:35 PM	291
June 18	Avelo	XP8518	LAL	2:00 PM	188
June 22	Aerolineas Argentina	AR1905	EZE	9:00 PM	272
June 20	Avianca	AV176	BOG	9:40 AM	180
June 23	Aerolineas Argentina	AR1906	EZE	5:00 AM	272
June 22	Avelo	XP8522	MIA	8:15 PM	188
June 26	JAL	UNK	NRT	2:45 PM	291
June 28	Aerolineas Argentina	AR1909	EZE	6:15 AM	272

All Things Transit

Raymond Mensah

TBU



TRANSPORTATION BUSINESS UNIT

Agenda

- Rental Car & Employee Shuttle Services
- Curbside & Parking Management
- Transportation Options



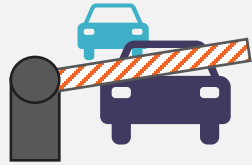
TBU BY THE NUMBERS

Fiscal Year 2025

Plaza Traffic

24.3M

exiting
vehicles



Ground Transportation

277K

taxi trips



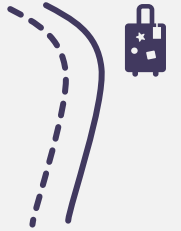
6.8M

TNC trips

Curbside Management

4.2 miles

of linear curbside



17.2M

vehicles utilize
curbside



Airside Bussing



530K

passengers

6,181

total
operations



Landside Bussing

205 buses



15.5M

passengers

8.6M

miles
driven



344

trips around
the earth

Public Parking

36K parking spaces

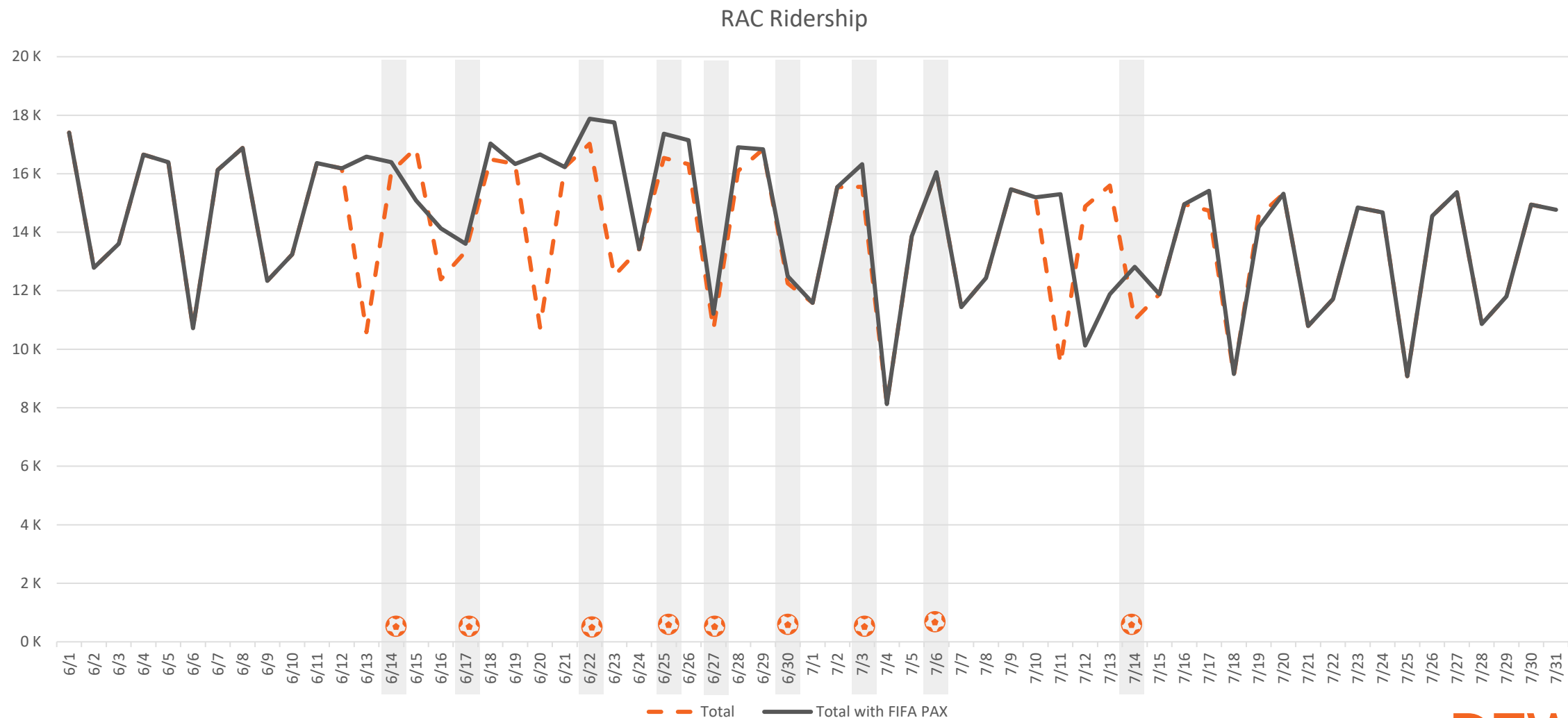


Rental Car Center & Employee Bus Operations



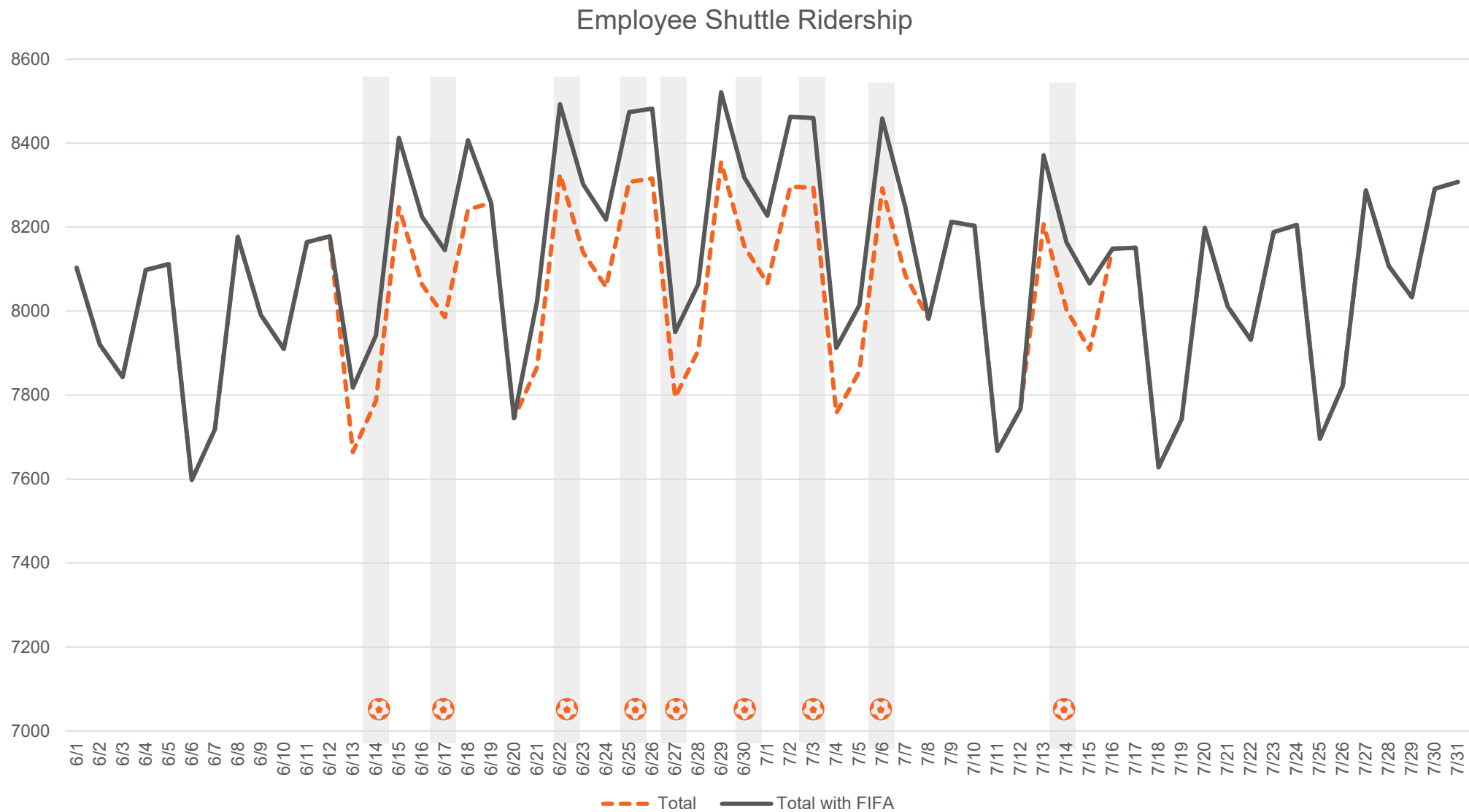
RAC Ridership Projections

2% FIFA-driven passenger growth is expected to increase RAC ridership, with peak demand projected at approximately 17.8K passengers on June 22nd.



Employee Ridership Projections

2% FIFA-driven passenger growth is expected to increase Employee shuttle ridership, with peak demand projected at approximately 8.4K passengers on July 29th.



Customer Experience & Operational Readiness



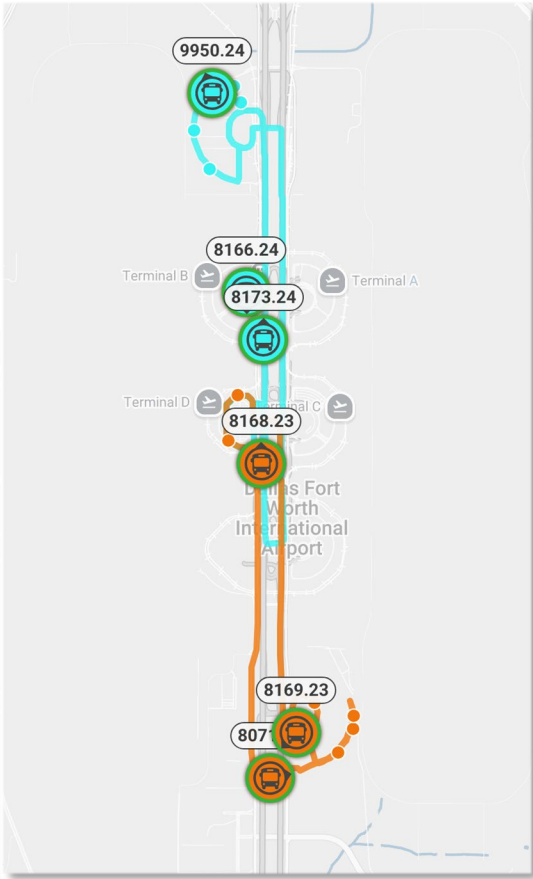
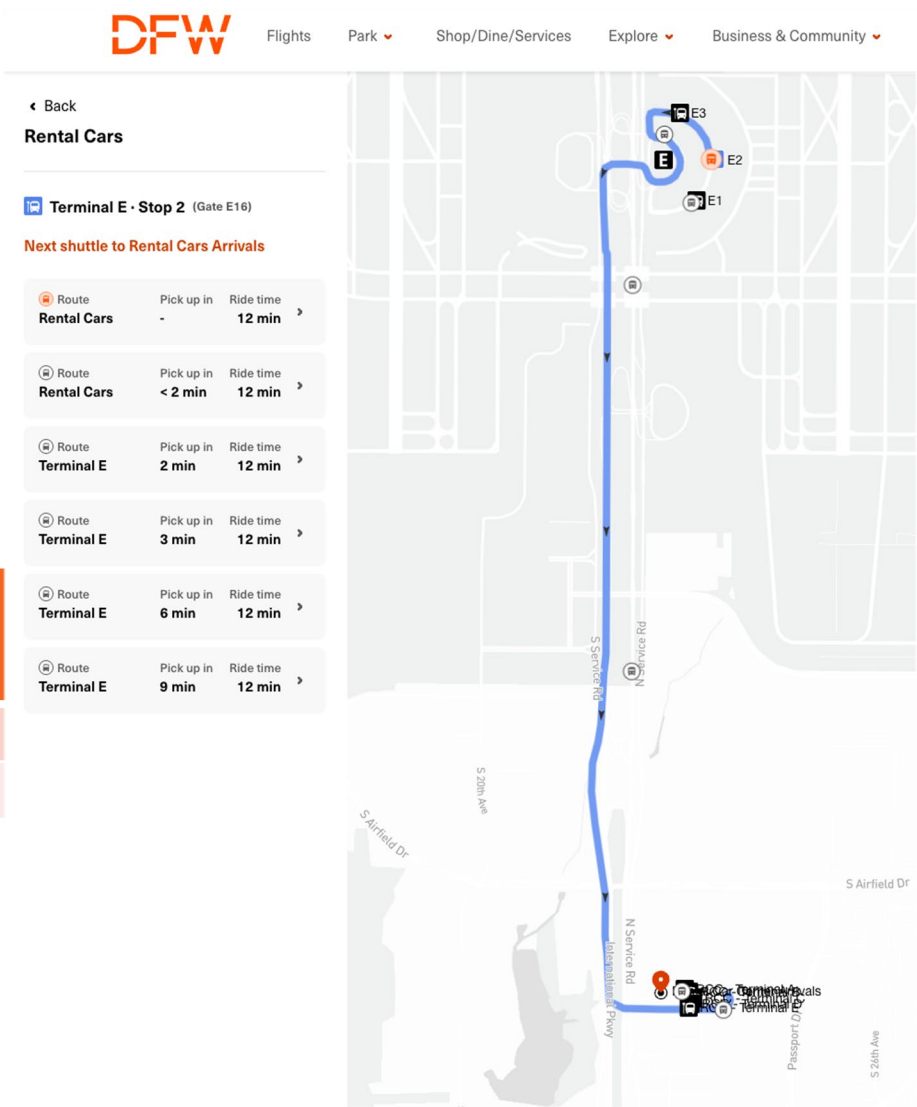
- Enhanced **multi-lingual** and **cultural sensitivity** training for Drivers and Customer Service Representatives (CSRs)
- Refresher training (luggage handling, ADA, etc.) to support high-volume international travelers
- Increased curbside ambassador presence with a translation device to support active queue management
- Employee Shuttle will monitor and add service on high-demand routes

Customer Experience & Operational Readiness

- Dynamic dispatching and real-time vehicle tracking
- Trailing bus strategy during peak arrival windows to rapidly clear terminal curbs
- Increase customer awareness and utilization of the shuttle tracker

Service	Buses in operation	Buses at Peak	Headway
Employee	29	31	6 min
RAC	48	51	5.5 min

DFW's Airport Shuttle Tracker



Curbside & Parking Operations



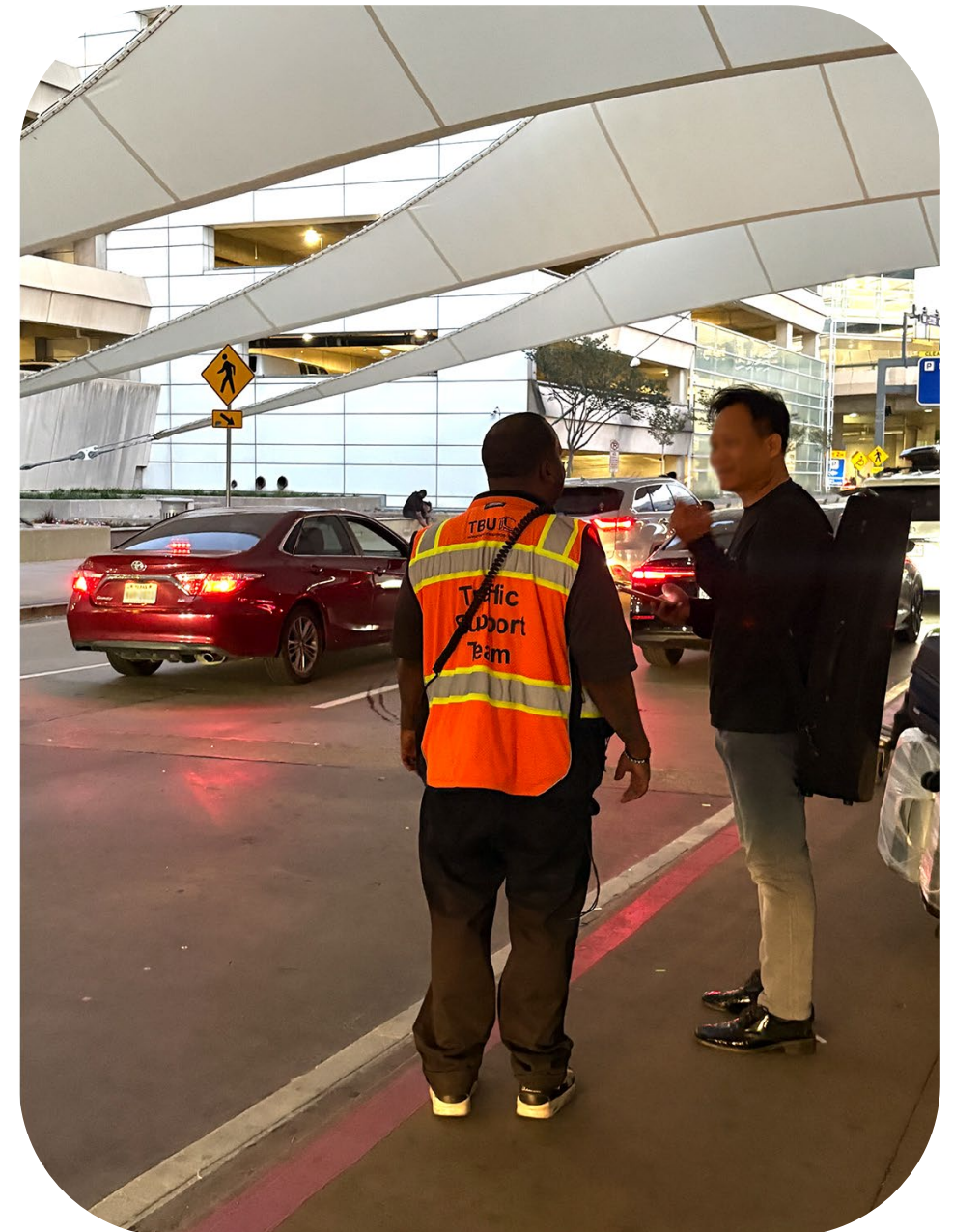
Curbside & Parking Readiness

Curbside

- Additional staff on upper and lower levels
- Traffic Support Teams active in all terminals
- Teams will be assigned to strategic areas and crosswalks in various terminals

Plazas & Parking

- Increased staff presence in automated lanes at the north and south plazas to assist and expedite throughput
- Courtesy Patrol in all terminals and surface lots to provide 24/7 assistance with service requests and locating lost vehicles



A blue-tinted photograph of a multi-level highway interchange. In the foreground, a bus with 'E EMPLOYEE' on its destination sign is driving on a lower level. In the background, another bus with 'Rental Car Center' on its destination sign is driving on an upper level, with a car visible further back. The scene is set against a backdrop of a large, modern building with a grid-like facade. The text 'Transportation Options' is overlaid in white, bold, sans-serif font across the center of the image.

Transportation Options

With increased travel expected, fans will have access to a range of transportation options at DFW

- TRE and Dallas (AT&T) Stadium
 - Provides connectivity between DFW Airport and AT&T Stadium
- Shuttle system connecting terminals to DART and TRE
- DFW Airport to FIFA Fan Festival
 - DART Orange and Green
- Existing ground transportation infrastructure (taxis, TNCs, charter buses, etc.) will remain available for passengers





FIFA World Cup Considerations

Ingram Brown

FIFA Match Schedule

June 14: Netherlands vs Japan - 3pm CST

June 17: England vs Croatia - 3pm CST

June 22: Argentina vs Austria - 12pm CST

June 25: Japan vs Sweden- 6pm CST

June 27: Jordan vs Argentina - 9pm CST

These five group stage matches are followed by the below elimination stage matches.

June 30: 2nd place, Group E vs 2nd place, Group I

July 3: 2nd place, Group D vs 2nd place, Group G

July 6: Winner of M83 (2nd place, Group K vs 2nd place, Group L) vs. Winner of M84 (1st place, Group H vs 2nd place, Group J)

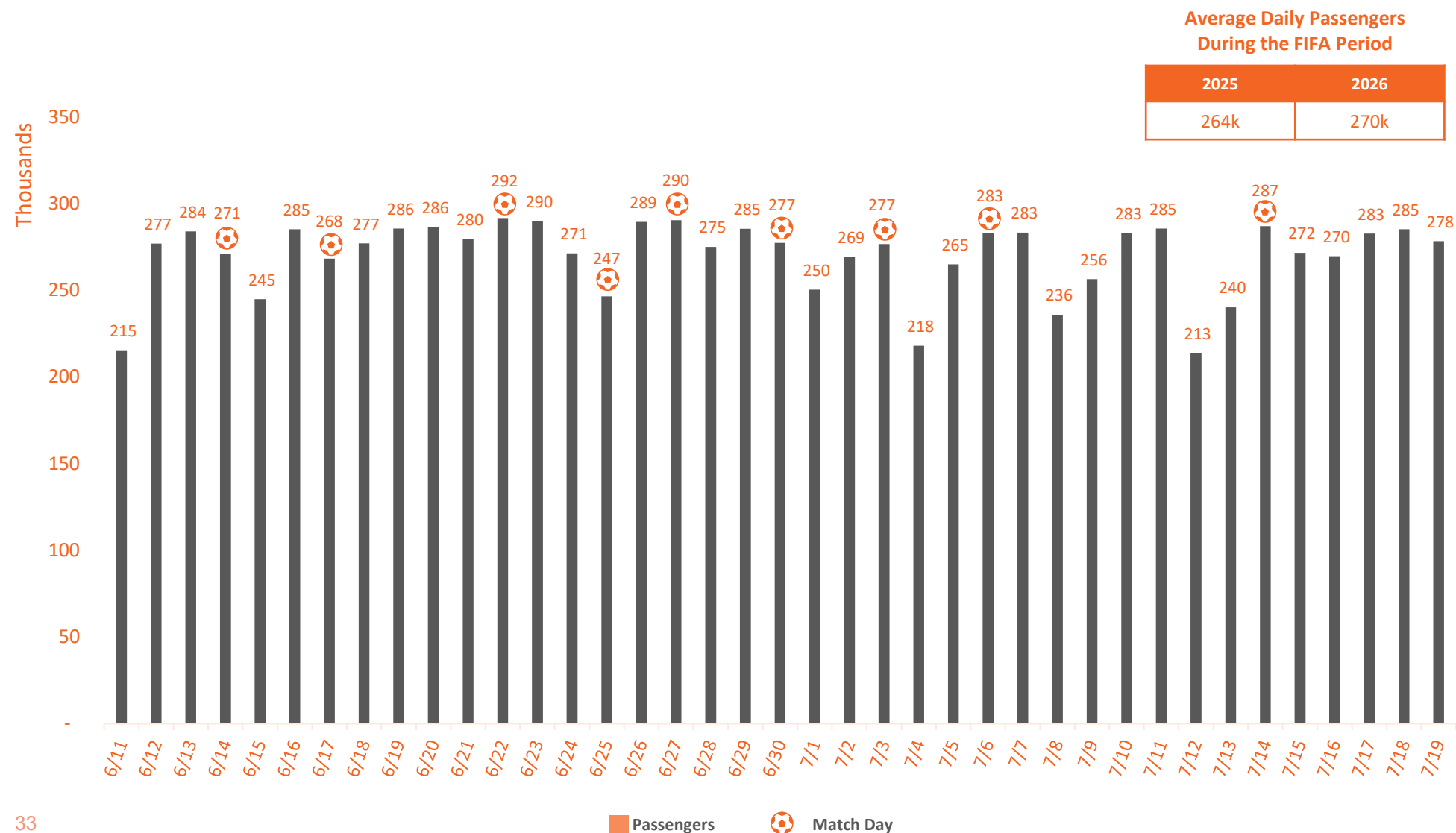
July 14: *Semi-final Match*, Winner of M97 (Quarter-final M1) vs Winner of M98 (Quarter-final M2)

Dallas Teams

The FIFA World Cup Impact Score reflect global popularity, historical performance / presence, and expected fan travel, teams with high scores will drive visitors in the DFW region.

Very popular				Regular Participant	New / Returning Team			
9	9	8	8	6	5	5	5	4
Argentina	England	Netherlands	Croatia	Japan	Czechia	Sweden	Austria	Jordan
								
Current World Champions	1966 World Champions x1	Finalist x 3	2018 Finalist 2022 Semifinalist	Regular World Cup participant since 1998	First appearance as Czechia (previously Czech Republic)	Last WCs were 2006 and 2018	First appearance since 1998	First-ever World Cup appearance
FIFA World Cup Impact Score (Scale of 1 to 9)								

Summer Estimated Passenger Volumes



Group Stage Matches

Sunday

June 14, **3pm**
🇸🇪 vs 🇯🇵

Thursday

June 25, **6pm**
🇯🇵 vs 🇸🇪

Wednesday

June 17, **3pm**
🇸🇪 vs 🇷🇺

Saturday

June 27, **9pm**
🇮🇹 vs 🇸🇪

Monday

June 22, **12pm**
🇮🇹 vs 🇸🇪

Knockout Matches

Tuesday

June 30, **12pm**
Round of 32

Monday

July 6, **2pm**
Round of 16

Friday

July 3, **2pm**
Round of 32

Tuesday

July 14, **2pm**
Semifinal

FIFA Overnight Considerations

Planning for overnight coverage on June 25 and June 27

- Partner with TSA and airlines for late night security checkpoint staff coverage or early morning openings
- Partner with concessionaires to offer more overnight hours for food and beverage availability
- Adjust cleaning schedules to avoid deep cleaning during heavy passenger traffic
- Ensure adequate coverage by CX front-line staff, DPS employees, etc.



A person with short dark hair and glasses, wearing a dark suit, is seen from behind, looking out of an airport window. An airplane is visible in the sky outside. The entire image has an orange tint.

Passenger Pain Points

International travelers coming for a World Cup match will not have much, if any, experience navigating international ports of entry. Some pain points may include:

- No credit/debit cards
- Language barriers
- Technology barriers
- No knowledge on American customs or culture

Welcome Desks

FIFA Welcome Desks will be open from
June 11 through July 16 from 8AM
through 7PM.



DFW

A29 Baggage Claim Area – Landside



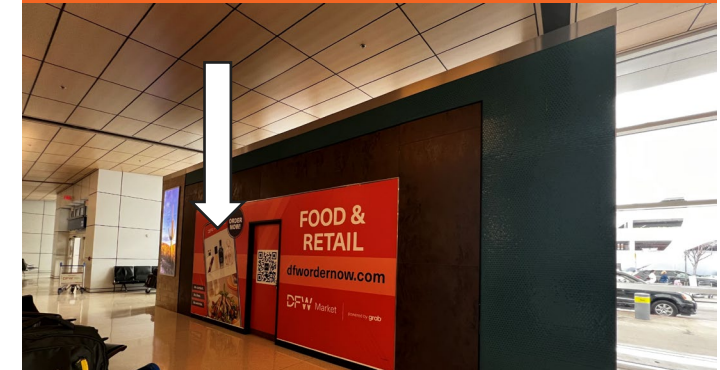
Located on the south side of the Terminal, by A29 Baggage Claim.

B25 Terminal Exit Area – Landside



Located on the center of the Terminal, by B25 Terminal Exit.

D23 Arrivals Exit – Landside



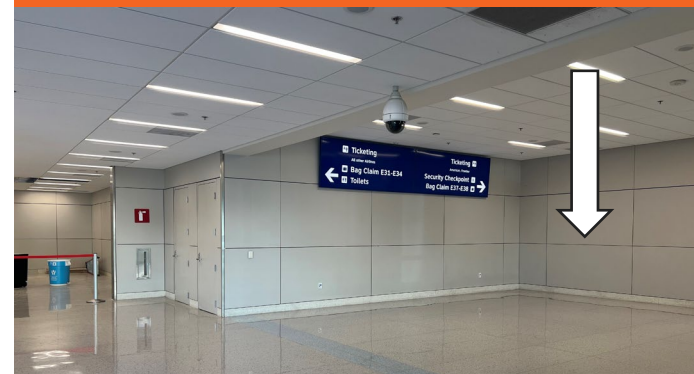
Located on the Arrivals Level, adjacent to International Baggage Claim.

D31 Concourse Level – Landside



Located on north side of the Concourse Level, by D31 Ticketing Hall.

E34 Baggage Claim Area – Landside



Located on the south side of the Terminal, by E34 Baggage Claim.

FIFA Staff and Volunteers

Due to DFW being a hub of operation for FIFA's arrivals and departures team, there will be:

- 10 FIFA Staff
- 60-80 FIFA Volunteers
- 80-100 Host City Ambassadors

They will be on site **May 18 through July 16**.
Volunteers and FIFA Staff will park in the North and South Remote lots.



Public Transport to FIFA Venues

Given the expected increase in international travel, DFW is working to communicate and direct passengers to the various train systems.

- TRE Link and Dallas (AT&T) Stadium
 - Connects the airport to the stadium
 - Use of bussing and shuttle systems
- DART and “FIFA Fan Festival”
 - Connects the airport to Fan Festival
 - Use of DART Orange and Green lines



Human Trafficking Considerations

To help mitigate and respond to the possible increase of human trafficking during FIFA, DFW is installing informational material in the men's and women's restrooms. These materials follow DHS's Blue Campaign and the IOC's See Say app.

If you see suspicious activity, or need to report human trafficking, **and there is an active safety concern, call 911.**

If you are unsure and need additional guidance, you can call DFW's non-emergency line at 972-973-3210.





Capital Improvement Game Plan

Fabian Cornelious

An aerial photograph of the Dallas Fort Worth International Airport, showing the terminal buildings, parking lots, and surrounding infrastructure. The entire image is overlaid with a semi-transparent orange filter. The title text is prominently displayed in the upper left quadrant.

THE CAPITAL IMPROVEMENT GAME PLAN

May, 2026

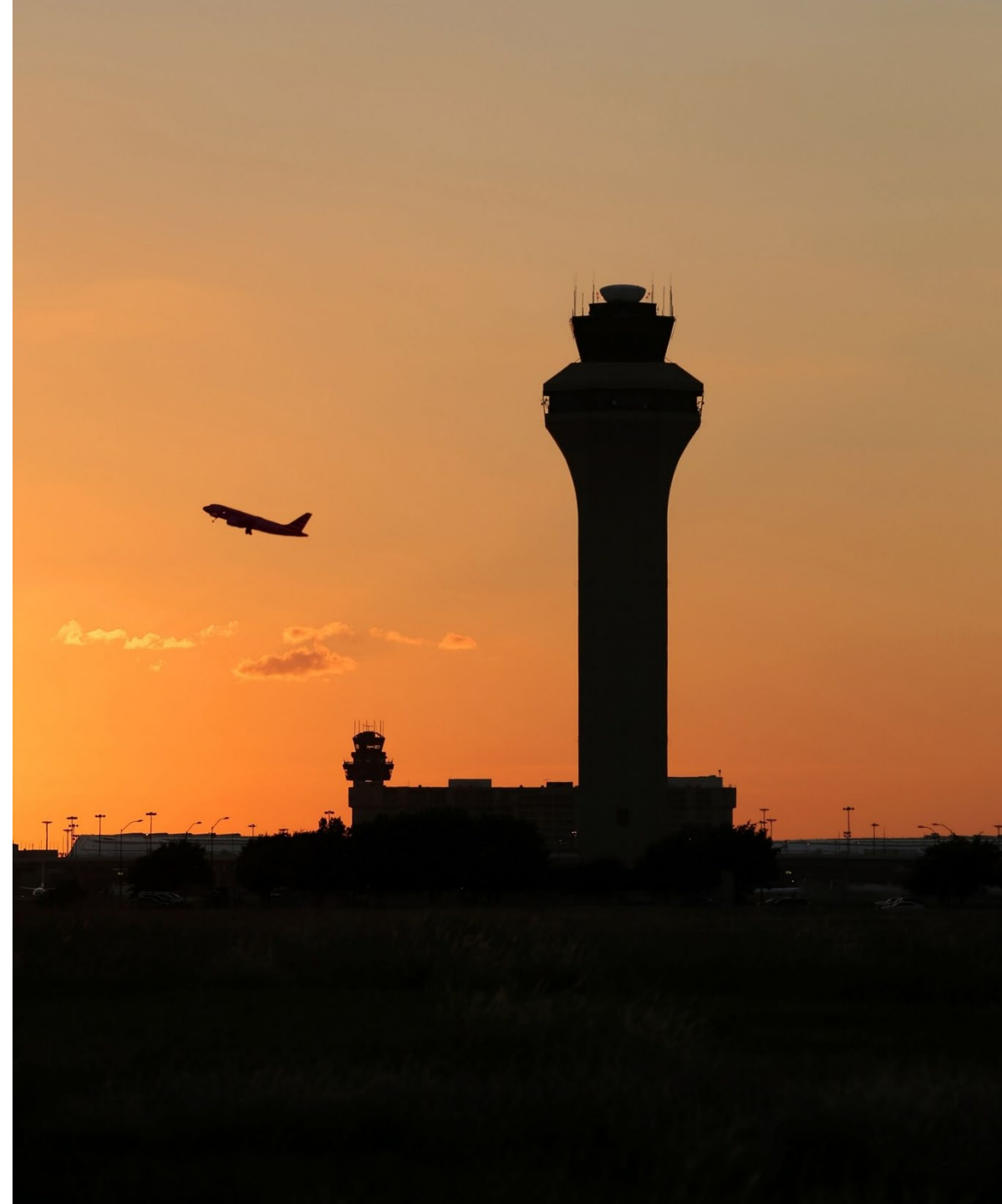
Fabian Cornelious

Assistant Vice President – Design, Code and Construction

Dallas Fort Worth International Airport

Key Projects

- International Parkway Modernization
- Terminal A & C Piers
- Terminal F Concourse
- Restroom Modernization Program



Airport Infrastructure

- ✈ 17,000+ Acres of property
- ✈ 7 Runways
- ✈ 12 Airfield bridges
- ✈ 122 Landside bridges
- ✈ 1,288 lane- miles of roadways
- ✈ Over 75M Sq. ft. of airfield pavement overall
- ✈ 4.85M Sq. ft. of assets reverting
- ✈ 474 miles of water, sanitary sewer and storm water infrastructure



Leadership Team



Tammy Huddleston
Vice President



Felipe Cruz Calderon
Assistant Vice President
Project & Design Mgmt.

-
- CTA Expansion Program
 - Terminal F Program



Fabian Cornelious
Assistant Vice President
Project & Design Mgmt.

-
- Civil Airfield Program
 - Civil Landside Program
 - Facilities Program



Omar Elbagalati
Assistant Vice President
Code, Construction & Survey

-
- Building Code
 - Permitting
 - Quality Assurance
 - Commissioning
 - Traffic Engineering & Survey

Infrastructure Capital Program



AIRFIELD



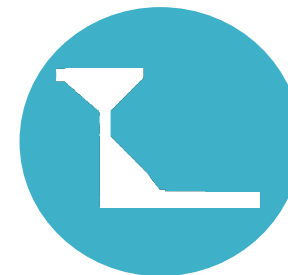
LANDSIDE



FACILITIES

2026 – 2036
\$5 Billion

Expansion Program



TERMINAL F



CTA EXPANSION

2020 – 2030
\$8.3 Billion

INTERNATIONAL PARKWAY MODERNIZATION

Project Highlights & Impacts

Project Description

Phase 1, removed the 50+ year old left-hand exit flyover bridges that were at end-of-life and serve as the main access for Terminals A, B, C from International Parkway. These have been replaced with right-hand exits to enhance safety and wayfinding for our customers. Additionally, the existing High Mast Light (HML) poles have been replaced and updated with LED lights. Phase 1, was successfully completed prior to the FIFA World Cup.

Key Dates

Start of Construction: **Q2 2024**

Phase 1 Completion: **May, 2026**

Phase 2 T/E Anticipated Completion: **Q4 2027**



Project Update

Phase 1

- Terminal B | Completed
- October 20, 2025 Terminal A | Completed December 18, 2025 Terminal C | Completed May 21, 2026

Phase 2

- Terminal E | Q3 2026 – Q4 2027

TERMINALS A & C PIER EXPANSION

Project Highlights & Impacts

Project Description

The Terminal A & Terminal C Pier projects will provide a net 9 gate increase by adjusting our trademark semicircle terminal shape. These piers built on the modular construction that we pioneered during the High C Gates project, with 245,000 SF being created through the utilization of 13 modules.

Key Dates

Start of Construction: Q2 2024 (Pier C),
Q2 2024 (Pier A)

Anticipated Completion: Q2 2026 (Pier C)
Q4 2026 (Pier A)

Project Update

- **American Airlines** operated their first flights from the Terminal C Pier on April 8 out of gates C33 and C34. The remaining seven gates are expected to open in the coming weeks.
- Pier A scheduled to complete per project schedule in the Fall of 2026.



TERMINAL F PHASE 1

Project Highlights & Impacts

Project Description

Terminal F was originally conceived as a 15-Gate double-loaded concourse for domestic flights that would serve DFW's OALs (Other Airlines). In Q2 2025, along with our partners at American Airlines, DFW announced that Terminal F would pivot to a 31-Gate Terminal serving both international and domestic flights for American Airlines. Through nimble design & coordination, we've been able to maintain construction progress during the transition in design.

Key Dates

Start of Construction: **Q4 2024**

Opening of first 10 gates: **Summer 2027**

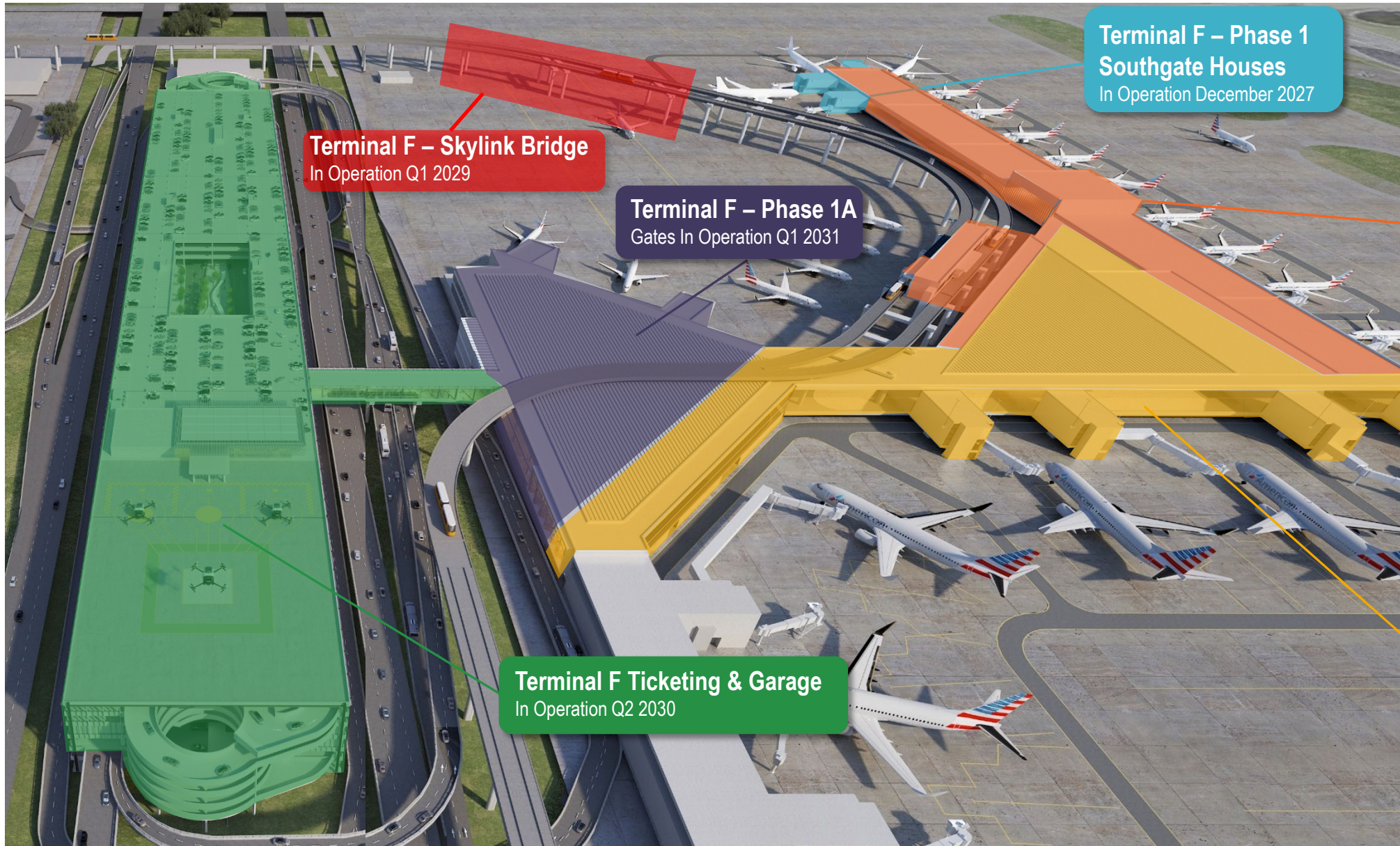


Terminal F -
Concourse & Apron
05.22.26
Week Ending
Construction Update

Project Update

- All six modules successfully transported in August 2025.
- Four of the six modules that will make up the new Skylink station were successfully been placed in February.
- Remaining two Skylink modules to be placed after Summer peak to minimize customer impacts.

TERMINAL F PHASING



**Terminal F – Phase 1
Southgate Houses**
In Operation December 2027

Terminal F – Skylink Bridge
In Operation Q1 2029

Terminal F – Phase 1A
Gates In Operation Q1 2031

Terminal F – Phase 1
In Operation Summer 2027

Terminal F Ticketing & Garage
In Operation Q2 2030

Terminal F – Phase 1A
In Operation Q4 2028

RESTROOM MODERNIZATION PROGRAM

Group 3

Project Highlights & Impacts

Project Description

To ensure our restrooms meet passenger demand both today and, in the future, we'll be renovating 55 landside and airside restrooms in Terminals A, B, D, and E. We'll be utilizing modular methodology to minimize customer impacts both during initial construction and during any future work required. These renovations will improve customer experience while expanding capacity and ensuring restrooms are not over utilized allowing for a higher level of cleanliness.

Key Dates

Start of Construction: **Q3 2025**

Anticipated Completion: **Q2 2026**



Project Update

- Group 1 | Completed in Q3 2025 (3 locations).
- Group 3 | E7 and A38 restrooms completed, A18 and D36 restrooms targeted to be completed prior to FIFA World Cup.
- Group 4 | To include six locations and complete in 2028.

DFW Forward >>>

DFW's Capital Improvement Program (CIP) is the ongoing plan to modernize, redevelop and expand the airport's infrastructure, technologies and assets, with most of the investments dedicated to major construction projects.

The airport isn't just getting bigger and better.

DFW is going monumental.

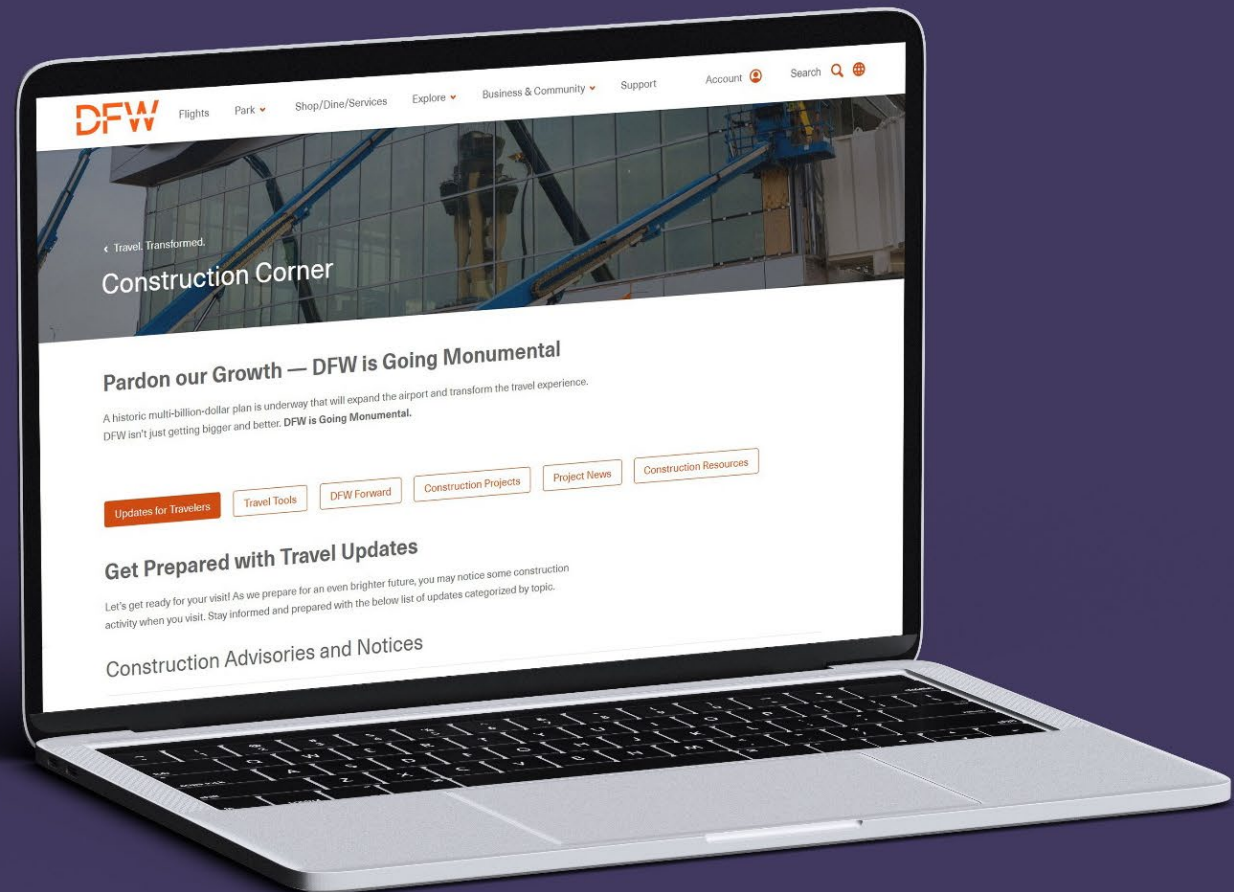


WELCOME TO CONSTRUCTION CORNER

- Updates for Travelers
- Tools to Navigate Construction
- Sign up for Construction Updates
- News and Fact Sheets



dfwairport.com/construction





The Concession Playbook **How We Win Together**

Zenola Campbell



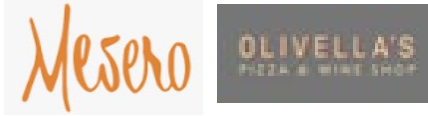
New Concession Locations FY26



Upcoming Locations

Opening by
FIFA

A



B



C



D



RAC



F

9 Locations
June Board

OS



DFW

Top Plays to Deliver a Seamless Customer Experience

Clean, Working, Friendly

Fully Staffed

Flexible Open/Close Hours



Watch Parties and Lease Line Activations

Notify your Business Unit Manager if your locations plan to show FIFA matches.

Share any planned FIFA-related lease line activations, promotions, or signage.

RDA's apply, activations and signage are subject to compliance review/approval.



Keeping Score

Daily Sales reporting by 6am (Template 2)

Effective July 1, 2026: terminal and offsite locations.
Effective September 1, 2026: RAC concessionaires.

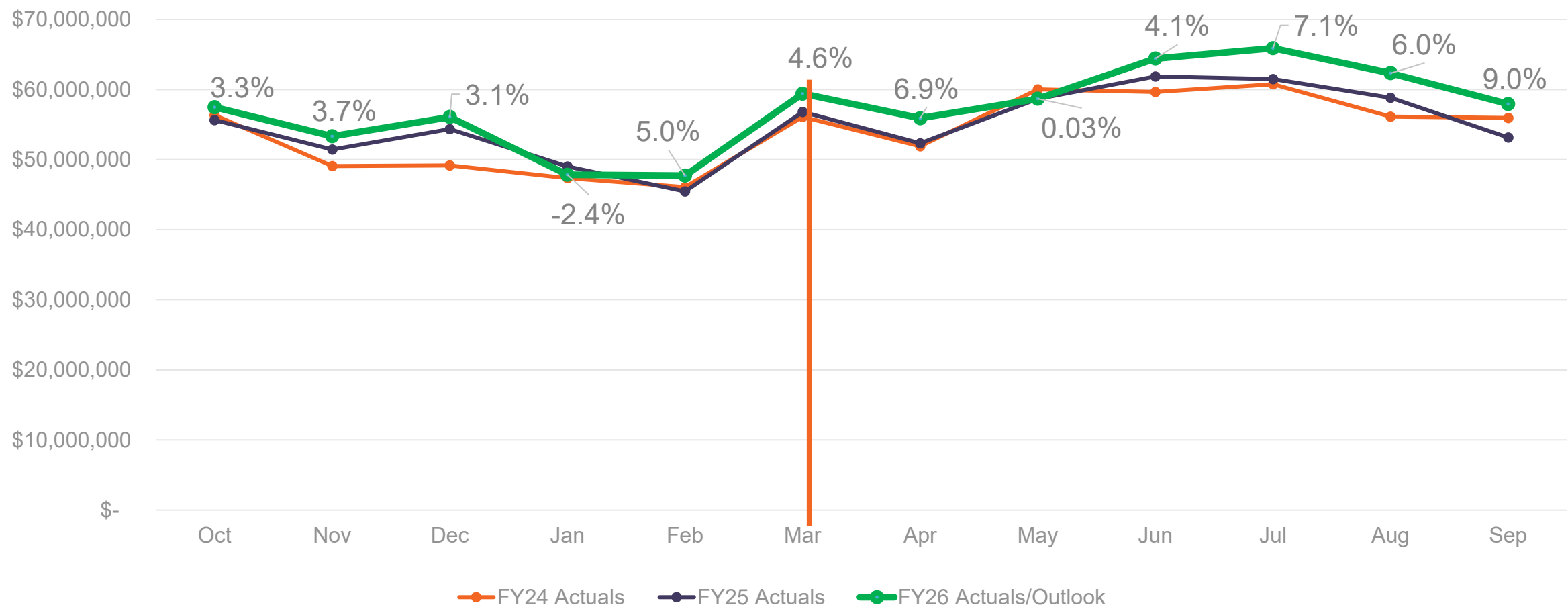
Mystery Shop & Price Audit Contracts

New Contracts to be announced in June.



Gross Receipts FYTD through Mar are up 4.6% vs FY25

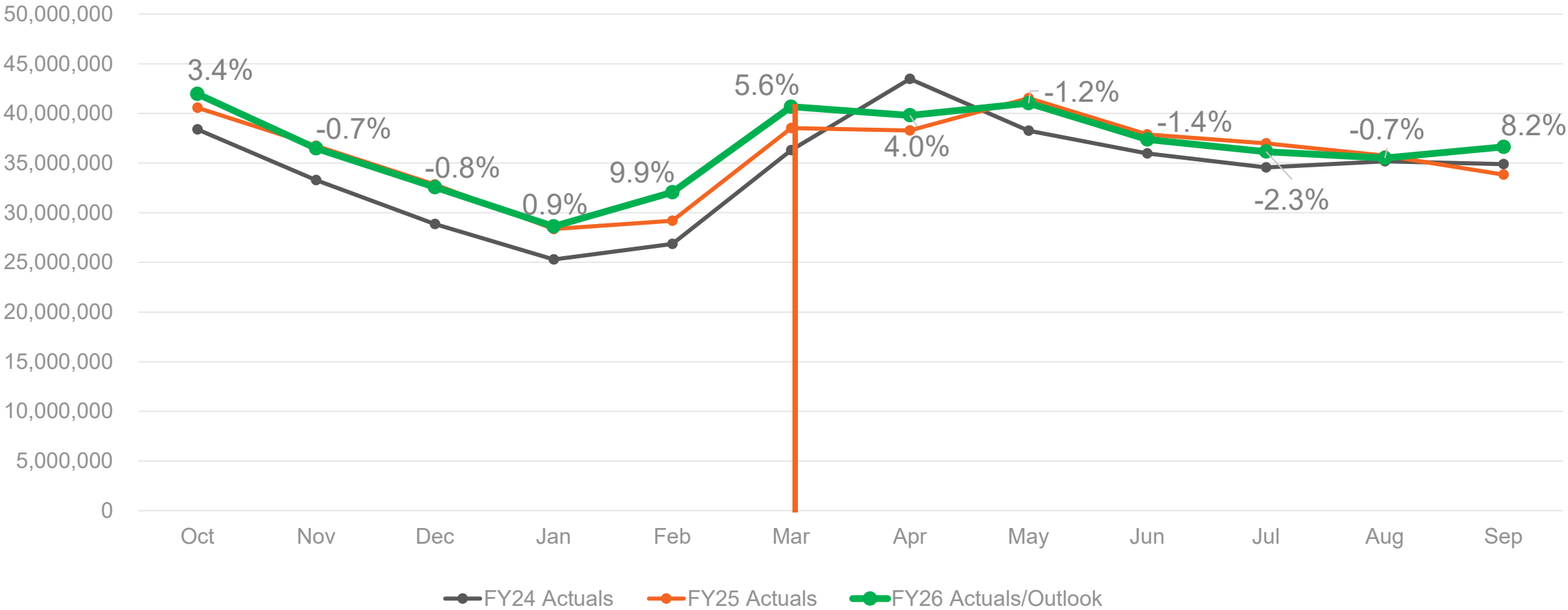
FY26 gross receipts are expected to be up 4.3% vs FY25, up 5.9% over FY24





RAC Gross Receipts FYTD through Mar are 5.6% vs FY25

FY26 gross receipts are projected to be up 1.94% vs FY25, up 6.7% vs FY24

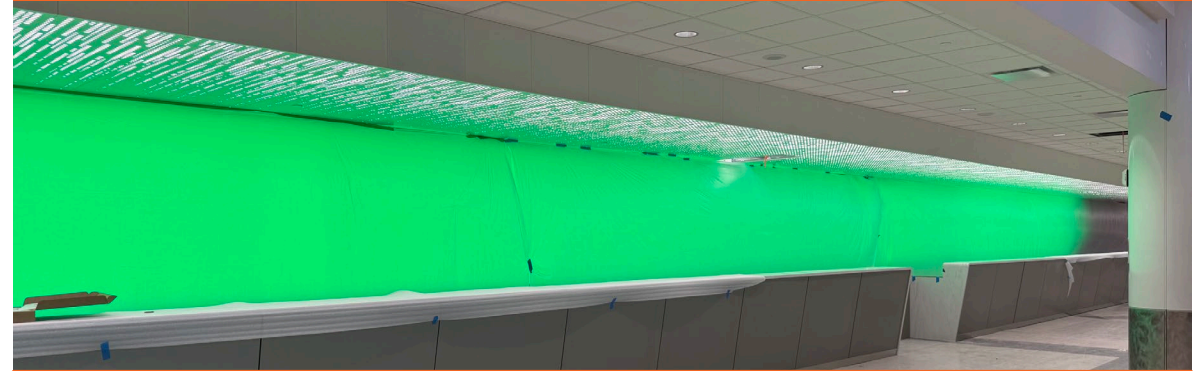


Counters



Tenants begin working on counter inserts next week.

Video Wall



Fully installed. North end in progress, and South end in testing.

Garage Reallocation



Barriers repositioned; signs & striping being installed.

Back of House



Phasing underway.



Thank You for Your Partnership

DFW would like to thank our Rental Car partners for their dedication and flexibility throughout the renovation process.

Your commitment ensures we continue delivering a seamless and elevated experience to every DFW traveler.





The Logistics Play That Changes the Game

Zenola Campbell





June → July → August → September

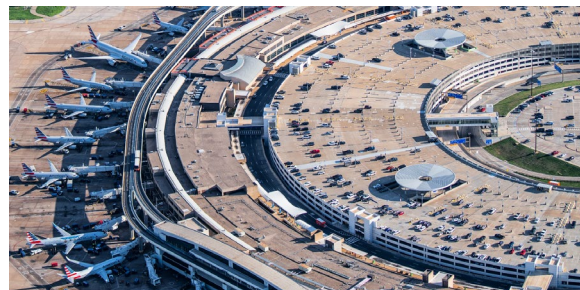
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| <ul style="list-style-type: none">• FORI: questionnaires• Construction• Security Plan | <ul style="list-style-type: none">• FORI: Operations Plan• Construction | <ul style="list-style-type: none">• Finalize Ops Plan• Construction• Prep for dry runs | <ul style="list-style-type: none">• Dry runs• Implementation<ul style="list-style-type: none">• Sep 28th |
|--|--|---|---|



CRDC Implementation

NOV 2026

Terminals A & E



MAY 2027

Terminal F



SEPT 28, 2026

Terminal C



DEC 2026

Terminals B & D





CRDC: Operational Adjustments

**Delivery
Window**

11pm – 5am



Cost

Effective October 2026



**Storage
Alignment**

Ongoing



A soccer referee in a blue uniform is walking on a green field, holding a yellow and red checkered flag. The background is slightly blurred, showing other players and the field.

Final Whistle The Closing Remarks

Ken Buchanan



**“Let’s step confidently into
this moment and win, as
#OneDFW team.”**

Thank you!

Concessions Forum Satisfaction
Survey

