



Dallas Love Field Charting a Course for the Future

IABSC
May 2018

What is an Airport?

- The land based access to air travel routes
- We help move people and goods efficiently over long distances
- Major job centers for aeronautical and related business
- Assets to our communities

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What will be an Airport?

- Old models will not work
 - Been on Greyhound lately?
- Disruptive technologies are now the reality
- Customers don't care why what you do is hard
- The world is going to be managed by a 3" screen

Our Goal

- We should be invisible
- Soon the “door to door” trip will be seamless
- If they need it, it should be easy to get
- We need to bring our partners into the now
- Nimble is better than consistent
- Failure is good

Who we Serve

- We have 4 customers
 - Super traveler
 - High Flyer
 - Family Unit
 - Amazed that planes fly
- An individual can be more than one

Get Over Ourselves

- No more “Airport for Airport Sake”
- Airports are not “Cities”
- Our customers can choose something else
- Being the best buggy builder didn’t work when Henry Ford showed up

Why we are Still Important

Airport	Impact	Output	Labor income	Jobs
Dallas Love	Commercial	\$2,341,640,837	\$1,079,122,813	38,863
	GA	\$480,351,680	\$167,845,5680	2,220
	Total	\$2,821,992,517	\$1,246,968,381	41,083
DFW	Commercial	\$15,626,379,766	\$7,373,325,519	267,597
	GA	\$75,075,408	\$26,931,636	321
	Total	\$15,701,455,174	\$7,400,257,155	267,918

TxDOT Economic Impact – 2011 General Aviation in Texas

Positive Benefits to Cities

- “boarding per capita, passenger originations, and the presence of a major airline hub have a significantly large influence on population growth. In fact, hub cities grew between 9% and 16% faster than non-hub cities between 1990 and 2000.”
 - Melanie Green, “The Impact of Airport Development on Economic Development”, Urban Economics Literature Survey, 2014

Airports are Good,

Now What?

Guess What's not Cheap?

- Per Airport Council International annual survey:

TABLE 1
**AIRPORT INFRASTRUCTURE COST ESTIMATES
BY YEAR AND AIRPORT CATEGORY**

Millions of Current Year Dollars

Airport Category	2017	2018	2019	2020	2021	2017-2021	Percent
Large hub	12,627	13,502	13,778	10,929	9,539	60,375	60.5%
Medium hub	2,376	2,766	2,545	1,953	2,078	11,718	11.7%
Small hub	1,748	1,871	1,713	1,485	1,665	8,483	8.5%
Non-hub	1,068	1,084	1,100	1,117	1,134	5,504	5.5%
Other*	2,677	2,717	2,757	2,799	2,841	13,790	13.8%
Total	20,496	21,940	21,895	18,283	17,256	99,869	100.0%

Source: ACI-NA Survey and FAA NPIAS.

*Note: "Other" includes non-commercial service airports and 8 proposed airports based on FAA NPIAS report (2017-2021).

Guess What's not Easy?

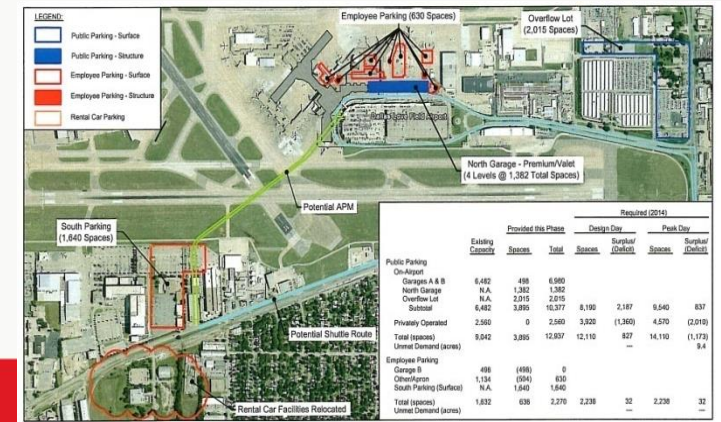
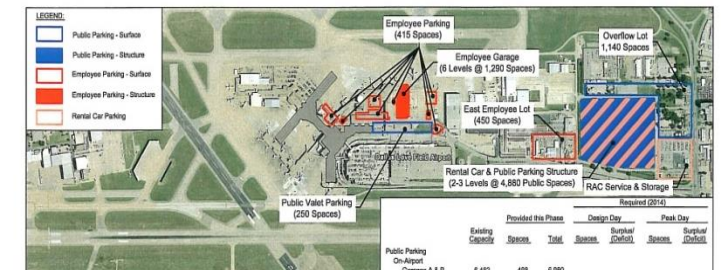
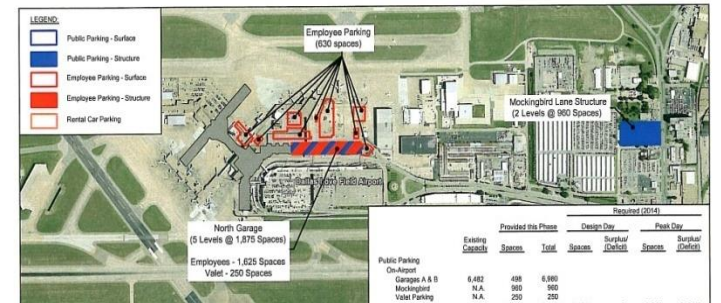
- “Guessing what the pitcher is going to throw is 80% of being a successful hitter. The other 20% is just execution”

Hank Aaron

- Guessing is expensive
- Guessing wrong is even more expensive

Programming

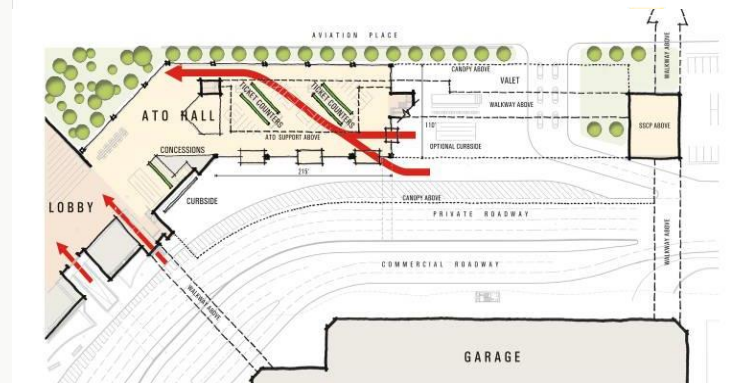
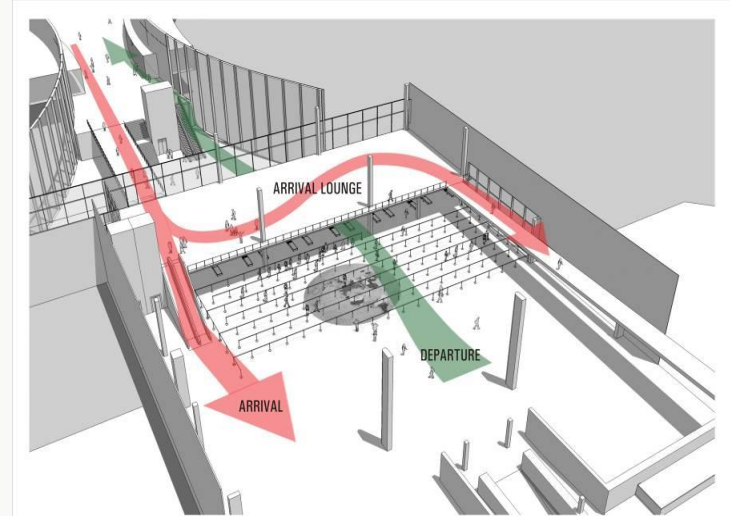
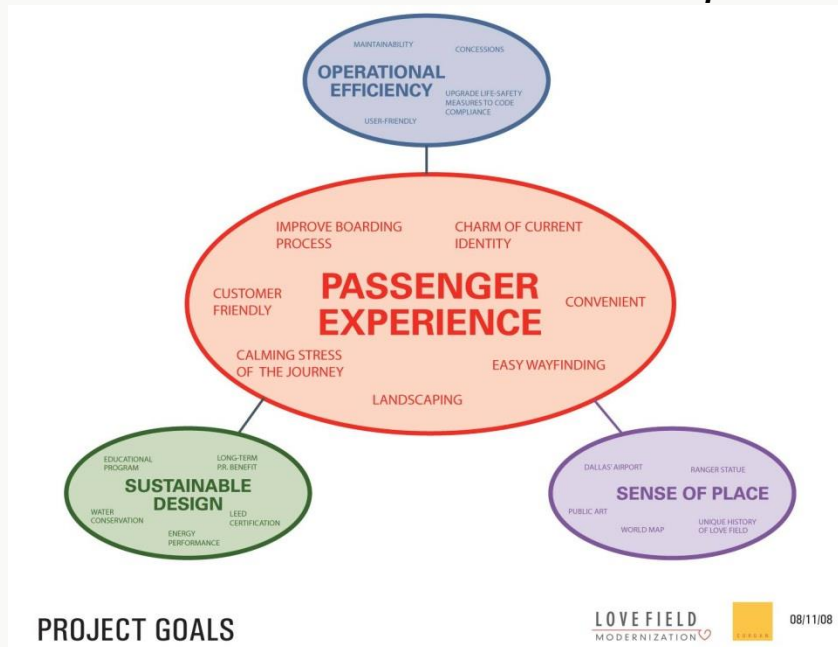
- PURPOSE
 - Develop terminal roadway and parking options to accommodate long-term demand
- KEY ACTIVITIES
 - Established ground transportation and parking demand levels based on projected passenger demand
 - Determined terminal future roadway and parking facility requirements
 - Developed multiple options to accommodate projected public and employee parking
 - Performed simulation analysis of terminal roadway to confirm level of service
 - Identified requirements for proposed drive-through bag check facility



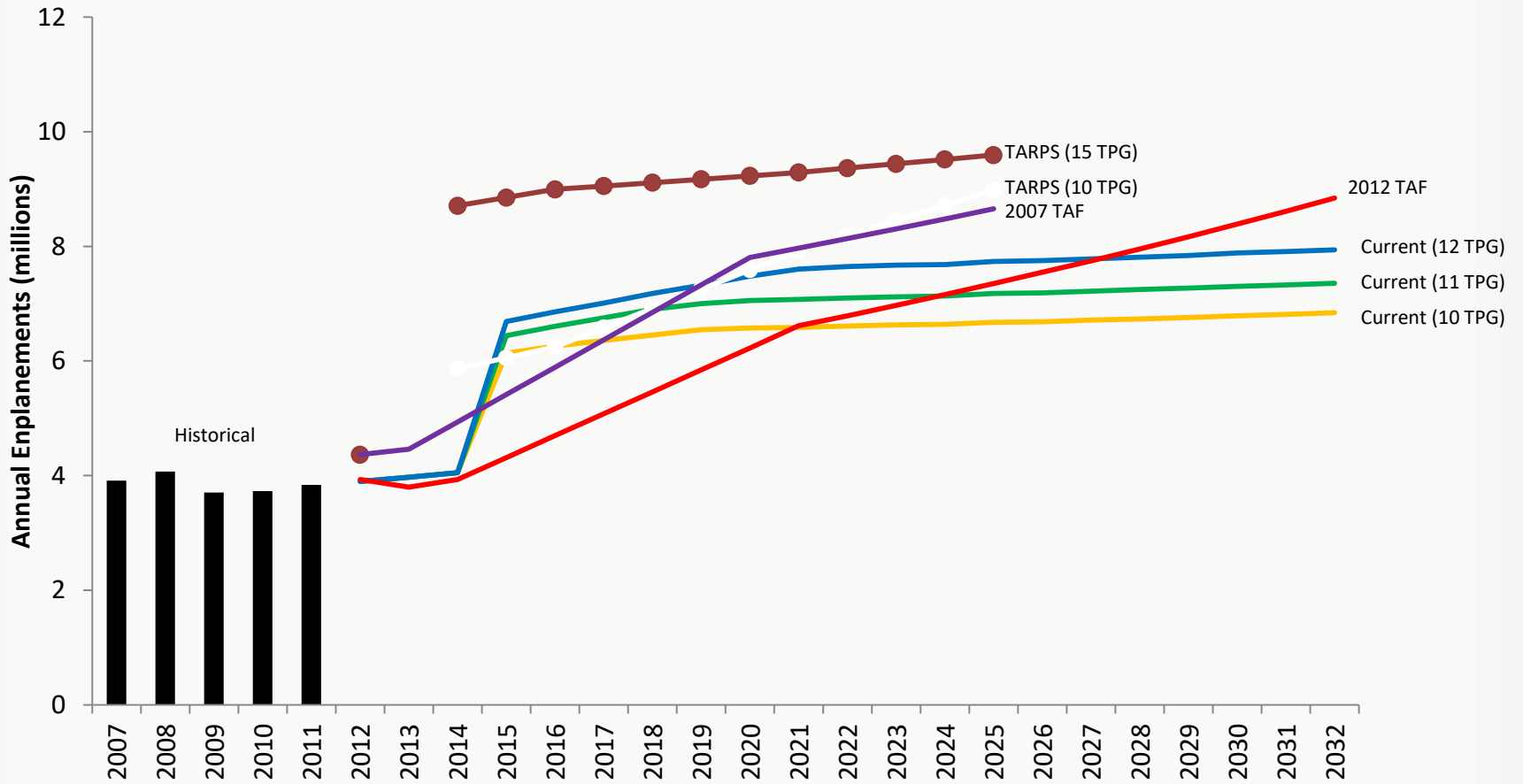
Planning

- Design Review #2 – Initial Design Concepts

Planning Results
Initial Engineering Studies
Initial Architectural Concepts



Possibilities



Forecast 2012

Fiscal Year	Current Draft Forecast			2008 TARPS		2012 and 2007 TAF	
	10 TPG	11 TPG	12 TPG	10 TPG	15 TPG	2012	2007
2012	3,894,496	3,894,496	3,894,496	4,365,915	4,365,915	3,929,180	4,365,915
2013	3,970,553	3,970,553	3,970,553	NA	NA	3,796,493	4,458,208
2014	4,048,096	4,048,096	4,048,096	5,865,580	8,708,380	3,929,637	4,935,077
2015	6,133,175	6,441,631	6,688,109	6,054,793	8,850,927	4,313,015	5,412,256
2016	6,260,954	6,601,984	6,854,675	6,244,005	8,993,473	4,695,742	5,889,779
2017	6,358,080	6,751,190	7,009,625	6,580,222	9,052,358	5,078,242	6,367,854
2018	6,450,143	6,902,528	7,177,840	6,916,439	9,111,244	5,459,908	6,846,538
2019	6,544,847	7,001,416	7,320,166	7,252,655	9,170,129	5,841,392	7,325,626
2020	6,574,049	7,054,259	7,479,789	7,588,872	9,229,015	6,222,964	7,804,769
2021	6,586,853	7,076,095	7,604,699	7,925,089	9,287,900	6,611,806	7,967,466
2022	6,607,043	7,096,670	7,648,568	8,188,662	9,363,916	6,788,817	8,133,655
2023	6,627,087	7,118,324	7,670,154	8,452,235	9,439,933	6,970,566	8,303,414
2024	6,639,722	7,131,334	7,683,508	8,715,807	9,515,949	7,157,182	8,476,823
2025	6,673,524	7,177,832	7,737,518	8,979,380	9,591,965	7,348,799	8,653,965
2026	6,685,012	7,189,656	7,749,652	NA	NA	7,545,544	NA
2027	6,712,523	7,217,336	7,779,370	NA	NA	7,747,556	NA
2028	6,735,042	7,244,709	7,808,715	NA	NA	7,954,977	NA
2029	6,759,018	7,273,192	7,838,385	NA	NA	8,167,953	NA
2030	6,787,713	7,299,748	7,885,398	NA	NA	8,386,632	NA
2031	6,813,151	7,326,839	7,909,307	NA	NA	8,611,167	NA
2032	6,840,388	7,353,370	7,938,549	NA	NA	8,841,714	NA
CAGR %							
2012-2015	16.3%	18.3%	19.8%	11.5%	26.6%	3.2%	7.4%
2012-2025	4.2%	4.8%	5.4%	5.7%	6.2%	4.9%	5.4%
2015-2025	0.8%	1.1%	1.5%	4.0%	0.8%	5.5%	4.8%
2012-2032	2.9%	3.2%	3.6%	NA	NA	4.1%	NA
2015-2032	0.6%	0.8%	1.0%	NA	NA	4.3%	NA

Guessing Wrong

Not for the Scrapbook



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AIRLINES JUN 2014



Over 6 million passengers a year at Love Field? Is that reasonable?

Terry Maxon



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LOVE | EVOLUTION
LOVE FIELD MODERNIZATION PROJECT

Not for the Scrapbook



So Now What?

- The demand affected all aspects of the airport operations
- Original BHS Designed and Funded by TSA in 2008 for \$13,340,000
- Based upon the then current PDGS #3 standard for inspection, BUT, by the time it was built, we were operating under PDGS#4
- The design anticipated a 2000/bag per hour capacity but we hit 1,500 once and averaged 1,250 bags per hour

So Now What?

- The original design called for 8 inspection tables, but with the PDGS change calling for 14 inspection tables we have been operating at a disadvantage from day one
- Seeking a solution with our limited space we found MIT capable of offering the table capacity and buffering within a small footprint
- The MIT Project costs totaled \$8,853,000.00, and when complete in June, we will have 16 inspection stations

So Now What?

- Christmas of 2017 we saw a 74% increase of efficiency over the previous year by decreased dieback incidents
- Hand scanners allow a rapid verification of the image that speeds inspection by isolating inspection area
- TSA can process more bags in less time as they perform the MIT “DANCE” moving between inspection stations with ease
- No recorded lost time due to injury, and attendance has increased

Cool Video



The Real Challenge

- “Give the City Council a briefing and recommendation”
- Translation:
 - “Somehow summarize hundreds of pages of documents, plans, and legal documents and countless man-hours spent on planning, feasibility studies, programming considerations, and passenger & financial forecasts into a 30-minute briefing with 25 slides”

What's Next

Planning Challenges

- Needs always outweigh resources
- Eat the elephant one bite at a time
 - Listen to your consultants
 - Don't listen to your consultants
- A plan is just that, not an order
 - If you have to modify, don't be afraid to do it
 - Mistakes happen, better to admit them and move on

Imagine

- Customers are screened at home
- Bags and passengers don't travel together
 - Bags have identity all their own
- Customers never speak to a human being
- Airports are no longer the only way to travel by air

Million(s) Dollar Gamble

- Infrastructure comes at high cost
- Public sector has to take long view
- What works against us
 - Difficulty in predicting demand
 - Emerging technology
 - Changes in public behavior
 - Hot trends can fizzle

Because in 1994...



Thank You