Hartsfield-Jackson
Atlanta International Airport

Ten-Year Vision

Mr. Jeff Pearse
Director of Marketing & Business Development
AGENDA

• Atlanta Facts  
• Airport Overview  
• Market Overview  
• Success Factors  
• Aviation Forecasts  
• Ten-Year Vision
ATLANTA - Facts

- Home to 5 million people
- 140,000 businesses
- 14 Fortune 500 Companies
- Capital of State of Georgia
- 28th Largest Economy in the World
- 3rd largest job generator over next decade
- 2000 foreign companies
- 80% US Population with 2 hours flying time
- Home to world’s busiest airport - ATL
City of Atlanta – 16 Kilometers

1740 Hectares
• Operated by the City of Atlanta
• Passenger Volume: 89.3 million
• Cargo Volume: 720,209 metric tons
• Aircraft Operations: 994,346
• Home of 2 hub carriers – Delta & Air Tran
• 1400 daily departures
• Service to 178 Domestic & 85 International Destinations
• ATRS: World’s Most Efficient Airport
Financial Snapshot

Revenues / Expense per EPAX

<table>
<thead>
<tr>
<th>Year</th>
<th>Total Revenues per EPAX</th>
<th>Total Expenses Per EPAX*</th>
</tr>
</thead>
<tbody>
<tr>
<td>2003</td>
<td>$6.17</td>
<td>$2.41</td>
</tr>
<tr>
<td>2004</td>
<td>$5.92</td>
<td>$2.39</td>
</tr>
<tr>
<td>2005</td>
<td>$6.36</td>
<td>$2.74</td>
</tr>
<tr>
<td>2006</td>
<td>$6.81</td>
<td>$2.83</td>
</tr>
<tr>
<td>2007</td>
<td>$7.64</td>
<td>$2.92</td>
</tr>
</tbody>
</table>
End-Around Taxiway
2007 Total Passengers 89.3 million

Market Overview
Airline Market Share

DELTA 70%
AIR TRAN 19%
ALL OTHERS 11%
Factors Driving Success

1. Ideal Geographic Location
2. Vibrant Regional Economy
3. Expanding Population Base
4. Innovative & Highly Efficient Layout
5. Visionary Leadership
6. Low User Fees
7. Global Reach & Connectivity
8. Strong Partnerships
9. On-Going Capital Development
Aviation Forecasts

Total Passengers – Domestic / International

<table>
<thead>
<tr>
<th>Year</th>
<th>Domestic</th>
<th>International</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>79.6</td>
<td>9.6</td>
</tr>
<tr>
<td>2009</td>
<td>79.6</td>
<td>10</td>
</tr>
<tr>
<td>2010</td>
<td>79.6</td>
<td>10.4</td>
</tr>
<tr>
<td>2011</td>
<td>81.2</td>
<td>10.8</td>
</tr>
<tr>
<td>2012</td>
<td>82.8</td>
<td>11.2</td>
</tr>
<tr>
<td>2013</td>
<td>84.4</td>
<td>11.6</td>
</tr>
<tr>
<td>2014</td>
<td>86</td>
<td>12</td>
</tr>
<tr>
<td>2015</td>
<td>87.6</td>
<td>12.4</td>
</tr>
<tr>
<td>2016</td>
<td>89.2</td>
<td>12.8</td>
</tr>
<tr>
<td>2017</td>
<td>90.8</td>
<td>13.2</td>
</tr>
<tr>
<td>2018</td>
<td>92.4</td>
<td>13.6</td>
</tr>
</tbody>
</table>
Aviation Forecasts

Total Passengers – Originating / Connecting

![Bar chart showing total passengers from 2008 to 2018 for Originating and Connecting flights. Each year shows a slight increase in passengers, with Connecting flights generally being higher than Originating flights. The chart highlights the upward trend in passenger numbers over the years.]
By 2015:
100 Million Passengers!!!

- 40.8 million O&D
  - 37m Domestic
  - 3.8m Int’l

- 59.2 million Connecting
  - 50.6m Domestic
  - 8.6m Int’l
Aviation Forecasts

Annual Aircraft Movements

2008: 1,010,000
2009: 1,010,000
2010: 1,012,000
2011: 1,022,000
2012: 1,042,000
2013: 1,060,000
Annual Cargo Volume – Metric Tones

<table>
<thead>
<tr>
<th>Year</th>
<th>Cargo Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>710,000</td>
</tr>
<tr>
<td>2009</td>
<td>726,000</td>
</tr>
<tr>
<td>2010</td>
<td>743,000</td>
</tr>
<tr>
<td>2011</td>
<td>760,000</td>
</tr>
<tr>
<td>2012</td>
<td>777,000</td>
</tr>
<tr>
<td>2013</td>
<td>794,000</td>
</tr>
</tbody>
</table>
Ten-Year Vision

Airport Capital Program - Major Elements

1. Runway 10-28
2. International Terminal
3. Consolidated Rental Car Center - CONRAC
4. West Terminal
5. South Gate Complex
6. South Cargo Complex
ATL

Runway 10-28
West Terminal Expansion
ATL
South Cargo Complex
Risks & Challenges

- Forecast Sensitivity
- Air Carrier Resistance
- Rising Construction Cost
- Access to Capital
ATL
Hartsfield-Jackson
Atlanta International Airport

Ten-Year Vision

Mr. Jeff Pearse
Director of Marketing & Business Development