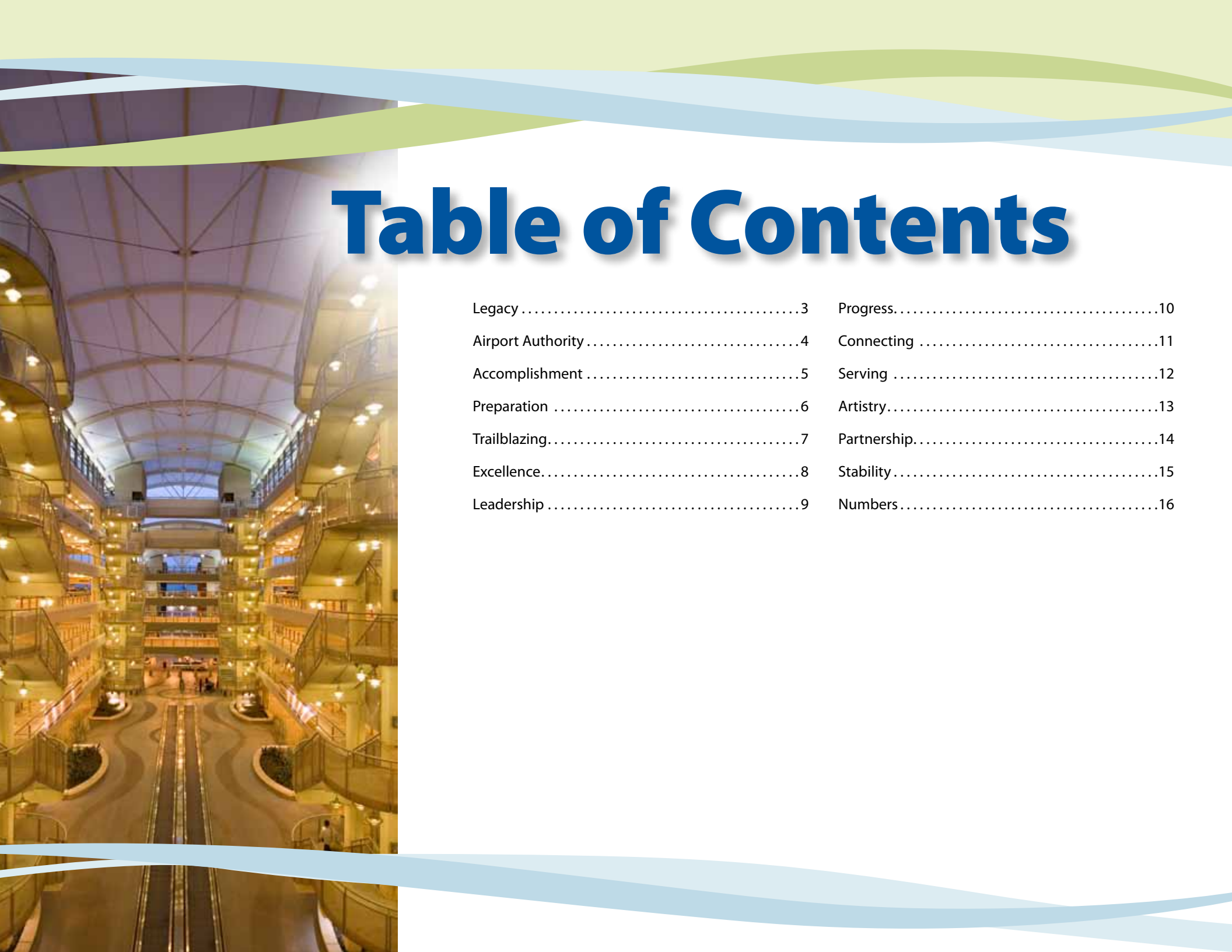


The background image shows an airport scene with a tall air traffic control tower on the left, a large terminal building with a curved roof in the center, and two Delta Air Lines aircraft on the tarmac in the foreground. The sky is clear and blue. The title text is overlaid on the right side of the image.

# **Raleigh-Durham Airport Authority 2009 Year in Review**





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# Legacy



In many respects, 2009 was a challenging year for Raleigh-Durham International Airport; however, it also was one of great opportunity. The worldwide economic downturn that affected the aviation industry made its presence known at RDU.

The Airport Authority weathered the past year's storm well. We tightened our budget, reduced spending and expenses and came through without a reduction-in-force, while achieving our financial goals for the year.

The current economic situation has ushered in a new era for the aviation industry. Fewer flights, less seat capacity, extra fees and high profit requirements for entering new markets are now defining the airline industry. To be successful in this new world, RDU must not only rethink the way we attract air service and provide services to our customers, but we must also continue our commitment to fiscal responsibility that has become our hallmark, while also identifying new opportunities for revenue generation and growth.

In light of this, we set out in 2009 on two major projects. First, we developed a strategic plan that begins the process of identifying future projects. Second, we completed a comprehensive customer satisfaction survey that tells us what passengers think of RDU and the services they expect from us.

In addition, we celebrated several accomplishments. The second phase of Terminal 2 topped out and is rapidly moving toward completion. As part of our commitment to environmental stewardship, we began a major airfield lighting rehabilitation project.

As 2009 drew to a close, the first signs of economic recovery emerged. In November, RDU posted its first month-over-month gain in commercial passenger traffic since March 2008. Cargo traffic also increased for the first time in as many months. Recently, air carriers announced the first additional service in some time with flights to Boston, St. Louis and new service to Milwaukee via Midwest Airlines, which returned in 2010.

In good and challenging times, we sincerely appreciate your investment in RDU. As we venture into a new decade, your support will be the key to our future success. We look forward to seeing what 2010 holds and providing for the air service needs of central and eastern North Carolina.

Regards,

Robert D. Teer, Jr.  
Chairman, Airport Authority

John Brantley  
Airport Director

# Airport Authority



## About the Airport Authority

Raleigh-Durham International Airport is governed by the Raleigh-Durham Airport Authority, an eight-member board. The cities of Durham and Raleigh and the counties of Durham and Wake appoint two members each to the Airport Authority board for two-year terms. The Airport Authority is a governmental body responsible for the development, operation and maintenance of the airport.

### Airport Authority Board Members:

- Robb Teer Jr., Chairman, City of Durham
- Terry K. Yeargan, Vice Chairman, Wake County
- Kim D. Frazier, Secretary, City of Raleigh
- Tonita F. Lipscomb, Treasurer, City of Durham
- Geoff Elting, City of Raleigh
- Craigie D. Sanders, Durham County
- Tommy Hunt, Durham County
- Michael A. Weeks, Wake County

## RDU's Vision

To be the best airport in the world known for its uncompromising service as judged by our customers, employees and owners.



*Clockwise, beginning upper left: Tommy Hunt, Craigie Sanders, Robb Teer, Tonita Lipscomb, Terry Yeargan, Kim D. Frazier, Michael Weeks. Inset: Geoff Elting.*

An aerial photograph of an airport terminal and tarmac. The terminal is a long, multi-story building with a central tower. Several aircraft are parked at gates or on the tarmac. The image is overlaid with a semi-transparent blue and green wavy graphic at the top and bottom.

# Accomplishment

*No one in the N.C. General Assembly in 1939 could have guessed the impact of their decision to charter the Raleigh-Durham Airport Authority. From humble beginnings as an Army Air Corps training field, RDU today is a thriving international airport with two terminals, nearly 200 daily departures and nine million passengers per year.*

*Sixty years down the road, we're operating in an aviation industry different than any before. What's certain, is that to know where you are going, you must know where you've been.*

The first decade of the 21st century has been one of great accomplishment and adaptation.

We've accomplished a list of capital building projects including a new parking garage, a new General Aviation facility, airfield improvements and the first phase of a new passenger terminal.

We broke the 10 million passenger-per-year mark. We've consistently maintained an AA credit rating and saw the opening of North Carolina's first airport-based United Services Organization.

In 2004 and 2009, we celebrated the 10 and 15 year anniversaries of RDU's non-stop flight to London, the only American Airlines transatlantic flight not based at a hub. In 2003, we celebrated the 100th anniversary of man's first flight, and we also celebrated RDU's 60th anniversary.



# Preparation

*Thousands of stories unfold in the Research Triangle Region each day. They have different authors but a common setting, and they are united by a shared experience. They are the stories of travelers passing through Raleigh-Durham International Airport.*

*While some travel on business and others for leisure, what's most important is how their story is shaped while at RDU. We're reaching out to our customers, and looking ahead to see how we can best serve them. This includes looking at adding new amenities.*

*It also entails developing facilities that provide a world-class experience such as a consolidated rental car facility and terminal renovations. While the conclusion of a story isn't revealed until the book has been read, we're laying the ground work now to ensure a happy ending to the decade that is just beginning.*

Not long ago, thoughts of 2010 conjured images of a futuristic society living in a science fiction world. While that may not be the reality, RDU is making preparations to enter a new decade with an aviation industry that has changed to meet new economic realities.

The year 2009 has been one of preparation for the Airport Authority. In between the two phases of the Terminal 2 construction project and in the midst of a downturn in the worldwide economy, it was a year to look inward to prepare for the decade to come.

To that end, the Airport Authority initiated two major projects that will help determine the way the organization operates in the years to come. These include the launch of a new strategic planning process and the completion of a comprehensive customer satisfaction survey.



# Trailblazing

As an airport, our focus is two-fold. We provide for the air service needs of our region while being a good neighbor to the communities and citizens around us. In deciding a new strategic direction based on these two facts, the Airport Authority board turned to those most familiar with airport operations—the Airport Authority staff, who have been tasked with blazing the airport’s trail into the next decade.

From applying best practices to the environment to providing services that meet the needs of the traveling public, the Airport Authority board and senior staff crafted seven goals to guide the planning process. Those were then divided into specific objectives such as making the airport more energy efficient, improving the employee orientation process, increasing the number of customer amenities and updating the air service development plan.

From there, Airport Authority staff from all divisions were tasked with working collaboratively in planning teams to produce a plan of attack for meeting each objective. Once an objective is deemed to have been met, team members will begin work on a new objective in a process that will result in the organization’s continuous improvement.

# Excellence



Getting to know our customers drives us to excellence. To accomplish this, we conducted a benchmark customer satisfaction survey in 2007. It was repeated in 2009 to determine where we've come and where we need to go to make sure we meet our customers' needs.

Of the 517 survey participants, 46 percent routinely traveled for business and leisure, while 54 percent traveled for leisure. We also learned that 71 percent of those surveyed traveled less than an hour to reach RDU, 54 percent were female and 44 percent of RDU travelers are between the ages of 35-54.

The results showed that RDU is continuing its commitment to excellence. On a scale of 1 to 5, customers rated the Airport Authority a 4.5, up from 4.06 in the 2007 survey. Over the previous survey, customers told us they were most pleased with improvements to the comfort of waiting areas/gate areas, restroom cleanliness and the courtesy and helpfulness of staff.

They also let us know that there are some items they'd like to see offered in the future. Among those are a greater variety of healthy food options and an expansion in the number of power outlets by the seating units in the boarding areas. In the future, customers would like to have the use of an Airport Authority-operated club space on the concourse.



# Leadership



*The environmental technician walks deeper into the beauty of a white-blanketed forest. The only sound is her boots cracking the freshly-laid snow. She approaches her destination — a small, nearly-forgotten pond. In the distance, an airplane takes off while she kneels down and opens a small kit.*

*Passengers waiting for flights in the terminals scarcely think about the nearly 5,000 acres of land at RDU. But we do. We know that environmental responsibility doesn't take a snow day. Whether it's collecting water samples, following a winter storm or cultivating ideas for utilizing alternative energy, RDU is at the forefront of stewardship.*

RDU is becoming a leader in environmental management by taking major steps to reach that goal, including issuing new policies and adopting new technology.

Monies from The American Reinvestment and Recovery Act helped the Airport Authority fund a project to replace the airport's airfield lighting system. The project involves replacing traditional quartz bulbs with energy-efficient LED bulbs. The change is expected to result in an annual savings of more than \$350,000.

In September, the Airport Authority board voted to enact a policy that requires many air service support vehicles to be converted from gas to electric power by 2015 to reduce harmful emissions. The change involves switching out more than 400 vehicles.

A large construction crane is lifting a heavy concrete block at a building site. The crane is yellow and has a long jib. The concrete block is being lowered into place. The background shows a clear sky and some other construction equipment.

# Progress

*One on top of another, the concrete blocks are stacked. Dust drifts by from a nearby drywall operation. The smell of fresh welding permeates the worker's mask as she lays yet another block on top of a thin layer of mortar. She glances behind her in time to see the last piece of glass set into place. These are the scenes of progress.*

In about a year, the smell of welding will be gone and the presence of dust replaced by passengers flying out of the new Terminal 2, Concourse D. They'll be exploring even more shops and restaurants and making their way to their flights.

It's almost unbelievable how fast construction on Terminal 2 progressed in 2009. In January, the site still contained debris from the demolition of Terminal C. By year's end, a nearly fully-enclosed structure stood adjacent to the operating portion of Terminal 2.

On August 7, a crane raised a single wooden truss bearing the signatures of hundreds of workers and Airport Authority staff to the roof of the terminal's ticketing lobby. At that point, the airport celebrated the topping out of a project more than a decade in the making.

When the building is complete in early 2011, it will provide the Research Triangle Region with a truly world-class front door for the millions of visitors and residents who pass through each year. It will also provide much needed space for recruiting new airlines and air service to the region, which will help further connect North Carolina to the world.

# Connecting

*As an executive for a Fortune 500 company, he travels nearly every week. Less time at the airport means more time with family, so he has high expectations for RDU. He has his favorite parking space, knows the screens of the check-in kiosk by heart and is greeted by name at his favorite restaurant. He knows he'll receive nothing less each week at RDU.*

From attracting new air service to providing the best amenities for our passengers, RDU is constantly raising the bar. We know what our passengers expect of their travel experience and we aim to exceed their expectations.

The primary goal of any airport is to provide connections to destinations around the world. During a time of economic recession, establishing links to new cities and attracting new airlines can be nearly impossible. In 2009, RDU did both.

Nearly nine million passengers traveled through RDU on one of nearly 400 daily arrivals and departures. Top destinations continue to include New York, Boston, Chicago and Dallas.

This year, airlines announced new service that would begin in Spring 2010. On April 1, Midwest Airlines returned to RDU with twice daily service to Milwaukee. As a subsidiary of Republic Airways Holdings, passengers have convenient access to Midwest Airlines' route system and Frontier Airlines, offering easy connections to the western United States.

Southwest Airlines began daily service to St. Louis in May 2010. JetBlue also increased its service to Boston.

# Serving



Serving passengers means taking care of them from the moment they arrive at RDU to the time they depart. When military service members arrived at RDU during the 2009 holiday season, they were greeted by a spacious temporary USO, courtesy of Archer Western Contractors, in the Terminal 2 ticketing lobby.

Upon arriving at RDU, passengers were greeted by Visitor Services Ambassadors who were certified in 2009 as N.C. Travel Counselors and who are able to provide a wealth of information about tourist destinations across the state.

Those arriving also look for the best options to reach their final destination. RDU added to the palette of choices last year when SuperShuttle, a shared van service, launched RDU operations.

The recruitment of SuperShuttle was years in the making, with partnerships with area convention and visitors bureaus working with RDU to bring the company to the Triangle as an efficient way to transport visitors to area conventions and conferences. Before the year was over, more than 300,000 customers were served.

Communication with customers is key to serving them. As many new ways to communicate emerge, the airport has responded by launching a Twitter account, [@rduairport](https://twitter.com/rduairport). The popular, free service allows the airport to communicate directly with customers via their mobile devices.

In December, the Airport Authority announced that Burger King would add a location at the airport's Aviation Station located at Aviation Parkway and National Guard Drive. The restaurant is scheduled to break ground in early 2010 and open by the end of the year. Aviation Station, anchored by Sheetz, opened in 2007 to cater to the needs of travelers before and after their flights, as well as to members of the community surrounding the airport.



# Artistry

For years, the Airport Authority has been committed to using its public spaces as a showcase for the arts. In 2009, that role continued with three new art installations.

When Terminal 2 opened in 2008, an open house was held. At that event, more than 5,000 members of the community applied their signatures for a new artwork for the terminal. *Signature Art* is now displayed in the Terminal 2 ticketing lobby as a testament to the community spirit surrounding the opening of the new terminal.

In the Fall of 2009, the Airport Authority reopened the art gallery in the Terminal 1 hallway between Bag Claim 3 and The Corner restaurant. The first new collection in the space was *The Thirsty Earth*, which showed the relationship between man and the presence and absence of water. New rotating displays will be added throughout 2010.

Mei-Ling Hom's *Cloudscape* was approved by the Airport Authority Board in early 2009 to be displayed on Concourse D of Terminal 2 when it opens. The hanging sculpture consists of more than 50 shapes resembling clouds, each with a different structure and size.



# Partnership

*Of the millions of passengers who traveled through RDU in 2009, it's likely that Willy got the most attention. When the wayward ocean-crossing Kemp's Ridley sea turtle landed on her return flight from London, the region couldn't get enough of her. Children displayed signs, the international media covered her trek from every angle and, for a day, RDU was at the center of a transatlantic tale.*

At the heart of the Research Triangle region lies RDU. We're dependent on the communities we serve and they're dependent on us as a vital transportation link. But the relationship stretches beyond the region's transportation needs.

Each year, RDU is proud to partner with the Special Olympics of North Carolina (SONC) to host its annual Plane Pull fundraiser.

Over the course of the year, 26,607 military personnel and their families visited the USO at RDU.

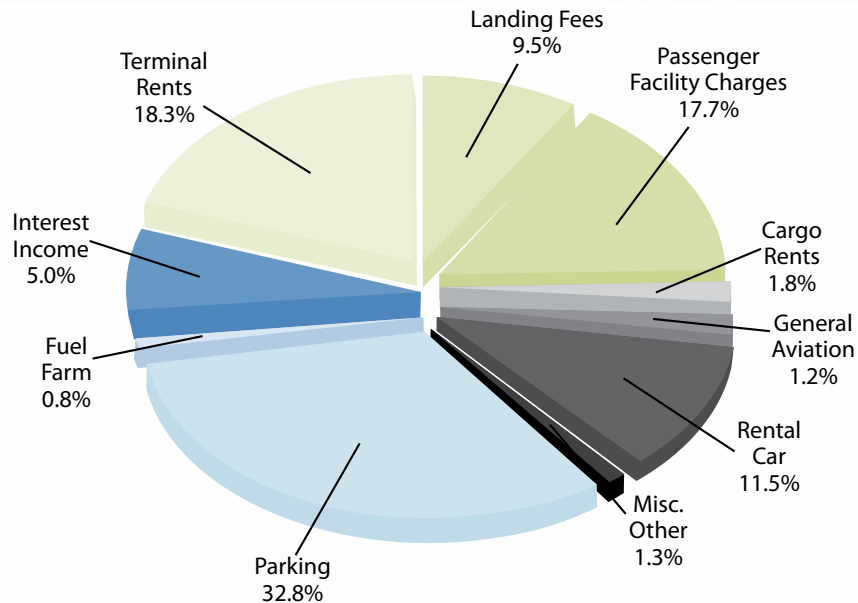
In the Spring, RDU hosted hundreds of fans as they cheered the late night arrivals of the Stanley Cup-seeking Carolina Hurricanes during the National Hockey League playoffs. Together, we also welcomed home the national championship winning University of North Carolina Tarheels after their victory in the National Collegiate Athletic Association tournament.

One month later, hundreds of students, media and members of the public descended on the airport's General Aviation Terminal in as the National Weather Service brought a P-3 Orion Hurricane Hunter Aircraft through RDU.

# Stability



## Total 2008–2009 Actual Revenues: Operating and Non-Operating



The Airport Authority continued its commitment to fiscal responsibility in 2009, despite the challenges presented by the worldwide economic recession.

During the year, the Airport Authority saw airlines reduce the number of daily flights, which reduced the number of available seats, thereby lowering passenger volumes. Passengers also spent less in our shops and restaurants and with our other tenants.

However, the Airport Authority budgeted extremely conservatively when planning for 2009, knowing that the aviation industry is dynamic and prone to economic upswings and downturns. We managed to weather the storm within our budget and without a reduction in the number of employees or services the Airport Authority offers.

### Revenue streams

As in years past, parking is the largest revenue generator for the Airport Authority. Parking accounted for nearly 33 percent of revenue earnings in the fiscal year ending March 31, 2009. Rent from airlines, concessions and other tenants in the terminal buildings accounted for the second largest grouping at 18 percent, followed by the passenger facility charge at 17 percent.

The chart on this page gives a detailed breakdown of the sources of income for the Airport Authority's operating and non-operating revenues.

# Numbers

## Operating Statistics

Nearly 9 million passengers traveled through RDU in 2009. The number is down from the previous two years, reflecting the effects of the worldwide economic downturn. While airlines reduced flights and the number of seats available to travelers, those seats that were available remained nearly full. This shows that the demand for air service at RDU remains high.

**Airline Passengers:** 8,973,209 passengers  
24,584 passengers per day  
7.6 percent decline

**Aircraft Operations:** 201,771 takeoffs/landings  
553 operations per day  
11.4 percent decline  
*(air carriers, general aviation  
and military operations)*

**Air Cargo:** 51,148 tons  
Tons/pounds per day:  
140/280,264  
14.8 percent decline

**Public Parking:** 1,764,672 vehicles;  
4,835 vehicles per day;  
10.2 percent decline

**Outbound Taxi Trips:** 227,807 trips ; 624 trips  
per day; +.2 percent increase

**RDU Employees:** 4,800

## 2009 Airline Service

**Top 10 RDU Markets:** Philadelphia, Atlanta, New York-LaGuardia, Chicago O'Hare, Orlando, Dallas-Fort Worth, Newark, Boston-Logan, Las Vegas, Tampa

## Airline Market Share:

Southwest:	22.33 percent
American and American Eagle:	21.40 percent
Delta and Delta Connection:	16.82 percent
US Airways and US Airways Express:	16.07 percent
Continental and Continental Express:	6.89 percent
Northwest and Northwest Express:	5.51 percent
United and United Express:	3.93 percent
JetBlue:	3.33 percent
AirTran:	3.00 percent
Air Canada Jazz:	.62 percent
Charters:	.13 percent





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