
Concessions Owner's Forum

January 11, 2024

***TOGETHER
WE ARE***

#OneDFW



Together we are ONE DFW

Panel of Speakers:

- Sean Donohue, CEO
- Ken Buchanan, EVP, Customer Experience & Revenue Mgmt
- Tammy Huddleston, VP DCC
- Milton De la Paz, VP, Airline Relations
- Jennifer Simkins, AVP, Concessions
- Amanda Souza, AVP, Concessions
- Tamela Lee, VP Business Diversity
- Sharon McCloskey, VP, Customer Experience
- Courtenay Shorter, Senior Manager, Risk Management
- Zenola Campbell, VP, Concessions

Opening Remarks

Sean Donohue, CEO





Clean, Working, Friendly

Ken Buchannan
Executive Vice President
Customer Experience & Revenue Management

TOGETHER
WE ARE

#OneDFW

A CUSTOMER
FIRST COMMUNITY

#OneDFW

WE ❤️ OUR
CUSTOMERS

#OneDFW

Operational Excellence
New Opportunities
Experience

DFW

Dependable
Frictionless
Working



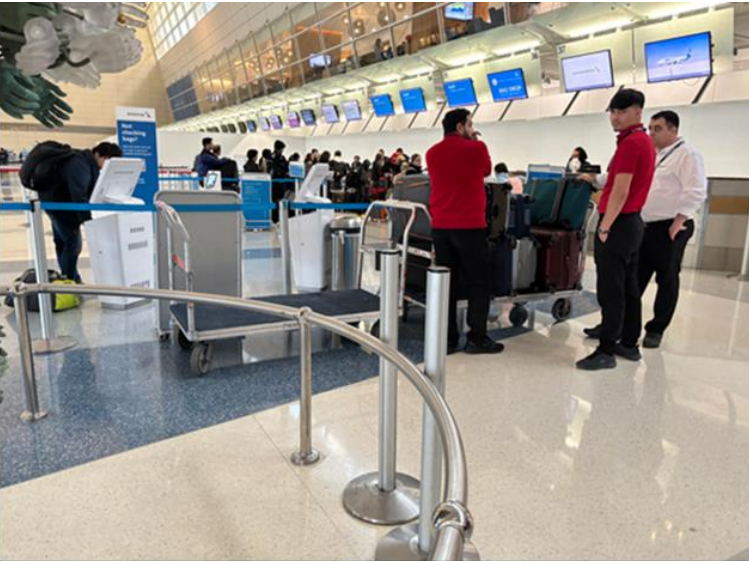
Construction Updates

Tammy Huddleston
Vice President, DCC

CTX Recapitalization (Terminals A, B, C & D) (D/B/B)



Terminal A – New CTX



Terminal D – Bag Portering

Project Update

Terminal B

- **BHS work complete.** Closeout documentation ongoing

Terminal A

- **Pod A: Go Live was Nov 29, 2023**
- Pod B: CTX 9800 delivery: Jan 2024 (1 x wk of Jan 22 & Jan 29)
- Pod C: CTX 9800 delivery: Apr 2024
- No temporary lobby screening required

Terminal C

- South Matrix De-Scoped; Working through transfer of work to AA
- Temporary lobby screening: Jul 2024

Terminal D

- Portering operation at AA ticket counter started 4 Jan
- Phase 1 CTX 9800 delivery: late Jan 2024 (4 x wk of Jan 22)
- Temporary screening in South Lobby scheduled start: Jan 30, 2024

Substantial Completion: Sep 2026

Employee Inspection Portals (D/B)



Project Update

- A24 turned over to DPS for training: Nov 13, 2023
- D10 to be turned over to DPS for operations: Jan 12, 2024
- 'Projected' Automated Entry Gates to be added to D10 portal: late Mar 2024
- Completion of A24 portal: late Apr 2024
- Completion of E02 / E37: late Apr / early May
- Completion of D37 / B26: late May / June
- **Substantial Completion: Jun 2024**

Holistic Airside Restroom Project



MODULAR KITS



Project Update

Group 1: A24, B19 & E34 Restrooms

- Design: Sep 2023 – Jan 2024
- Construction: Feb 2024 – Oct 2024

East West Connector Roadway (Rental Car Drive) (D/B/B)



Project Update

- NTP Construction: Jan 11, 2024
- **Substantial Completion: Dec 8, 2025**
- Final Completion: Feb 6, 2026

International Parkway Modernization (D/B)



IP- Right Visualization

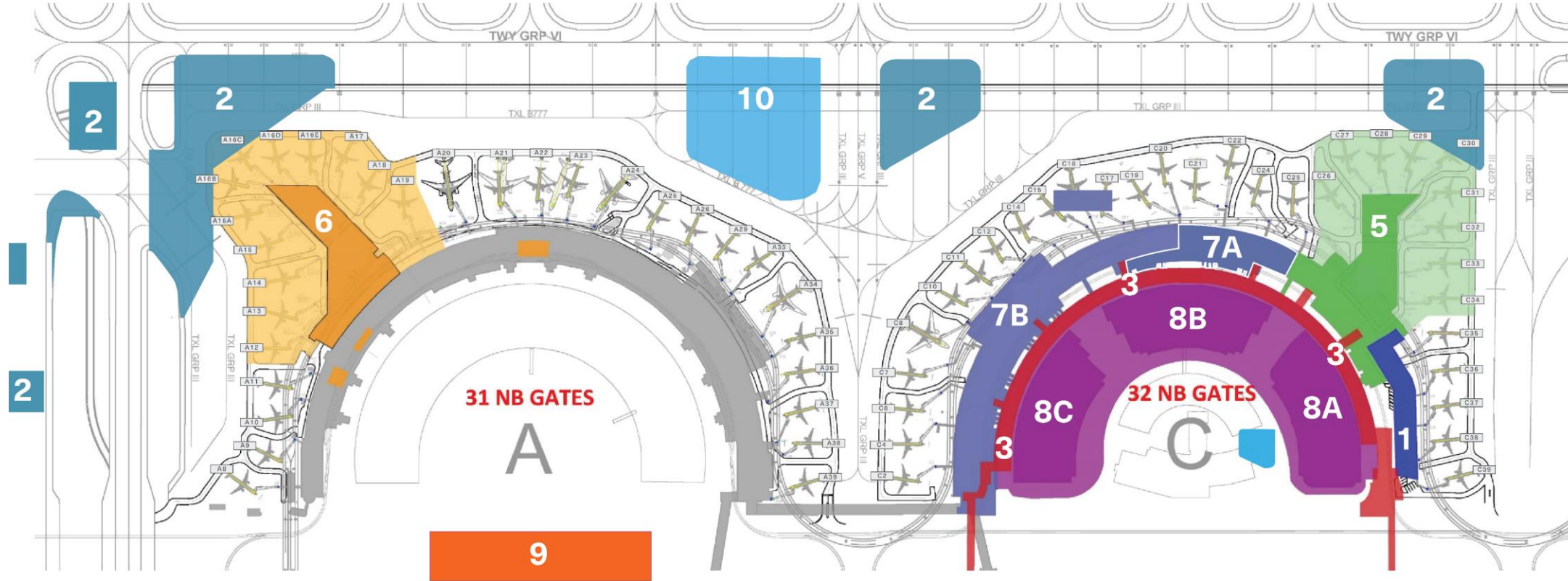


High Mast Light Poles

Project Update

- Survey and SUE activities ongoing
- Geotechnical investigation will follow
- Construction Start: May 14, 2024
- **Removal of old AirTrans structures will begin May 2024**
- Early Completion with Incentive: May 15, 2026
- **Substantial Completion: Oct 14, 2026**

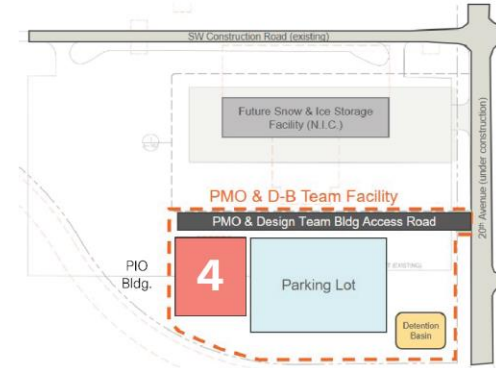
CTA Expansion Program



PROJECT 3
AIRFIELD EFFICIENCY
NOT VISIBLE FOR
TERMINAL B



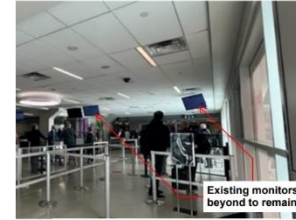
LEGEND	
1 High C Gates - COMPLETE	6 Terminal A Pier
2 Airfield Ramp Efficiencies	7 Terminal C Renovations
3 Service Delivery Systems	8 Terminal C Garage and Roadways
4 PIO Building	9 Electric Central Utility Plant (E-CUP)
5 Terminal C Pier	10 Southwest Airfield Safety & Efficiency



Terminal A Pier



1 - Check Point at A21 - Existing Condition

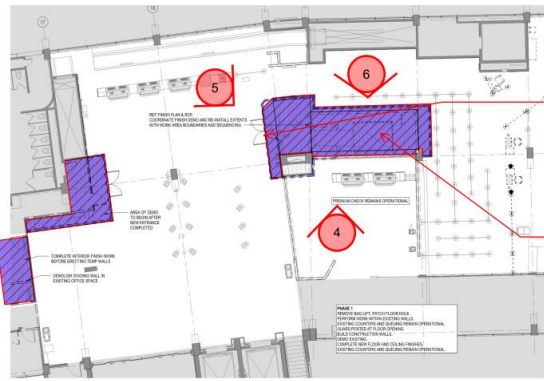
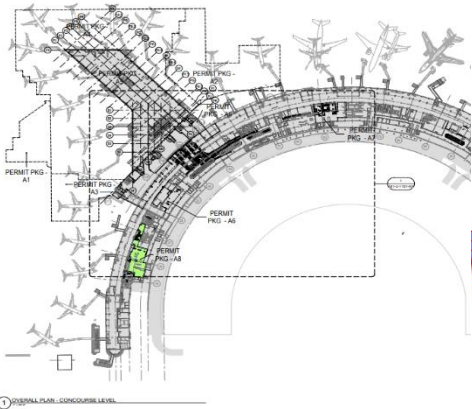


2 - Check Point at A21 - Existing Condition
Existing monitors to be removed, stored and reinstalled in similar location
Existing wall and glazing to be demolished

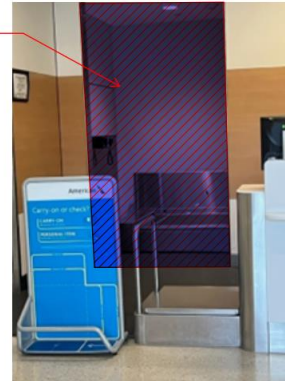
Project Update

- Construction Started at SSCP A21: Jan 8, 2024
- Construction Start at SSCP A12: Jan 29, 2024

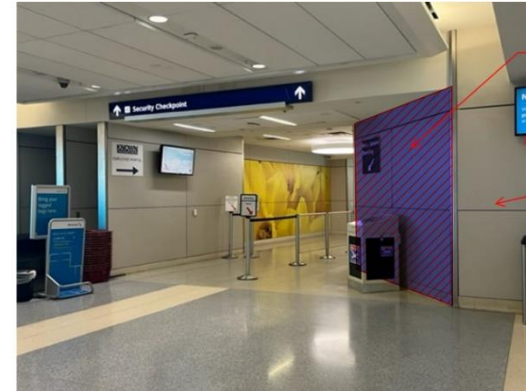
Terminal "A" - Permit Package # 7 Security location



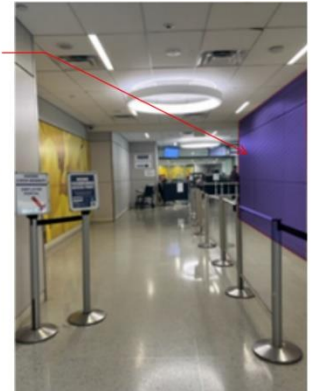
Infill with construction wall
Construction doors with DPS locks (typ)
To protect floor opening, screw plywood from below prior to slab installation to prevent SIDA breach. Provide guard while opening cover is not in place



4 - Bag lift enclosure



5 - Demo existing wall - Chamfer corner enclosure



6 - Demo existing wall

Terminal "A" - Permit Package # 8 Security location

Utilidor Service Delivery Systems



Demolition at future South Pump Room Area



Sample Closure Diagram for Stakeholder Notification

Project Update

- Construction NTP: Oct 11, 2023
- Construction/Demo Start: Dec 4, 2023
- Successful Utility Interruption: Dec 8, 2023
- First Major Closure: Jan 3, 2024
- First Closure Complete: April 9, 2024
- Next Closure Start: April 10, 2024
- **Substantial Completion: Jul 29, 2025**

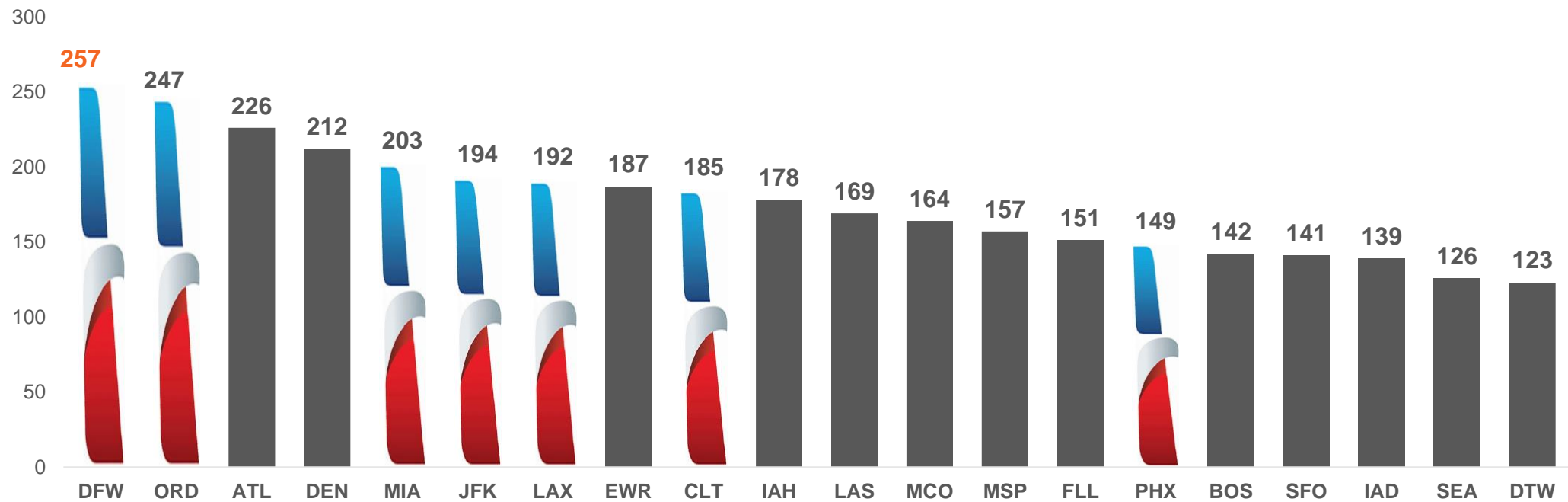


Air Service Updates

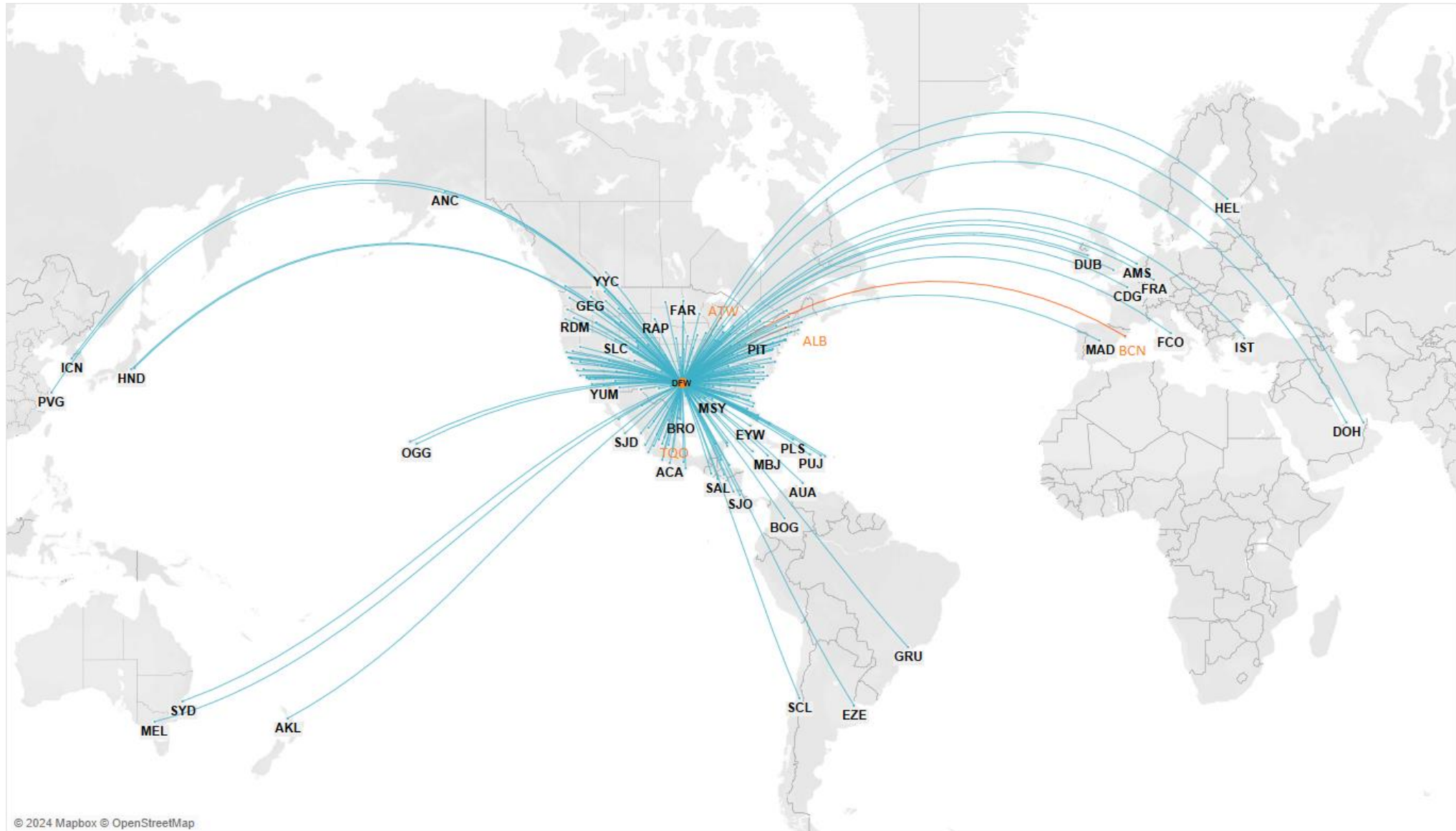
Milton De la Paz
Vice President, Airline Relations

DFW leads all US airports with 257 total destinations

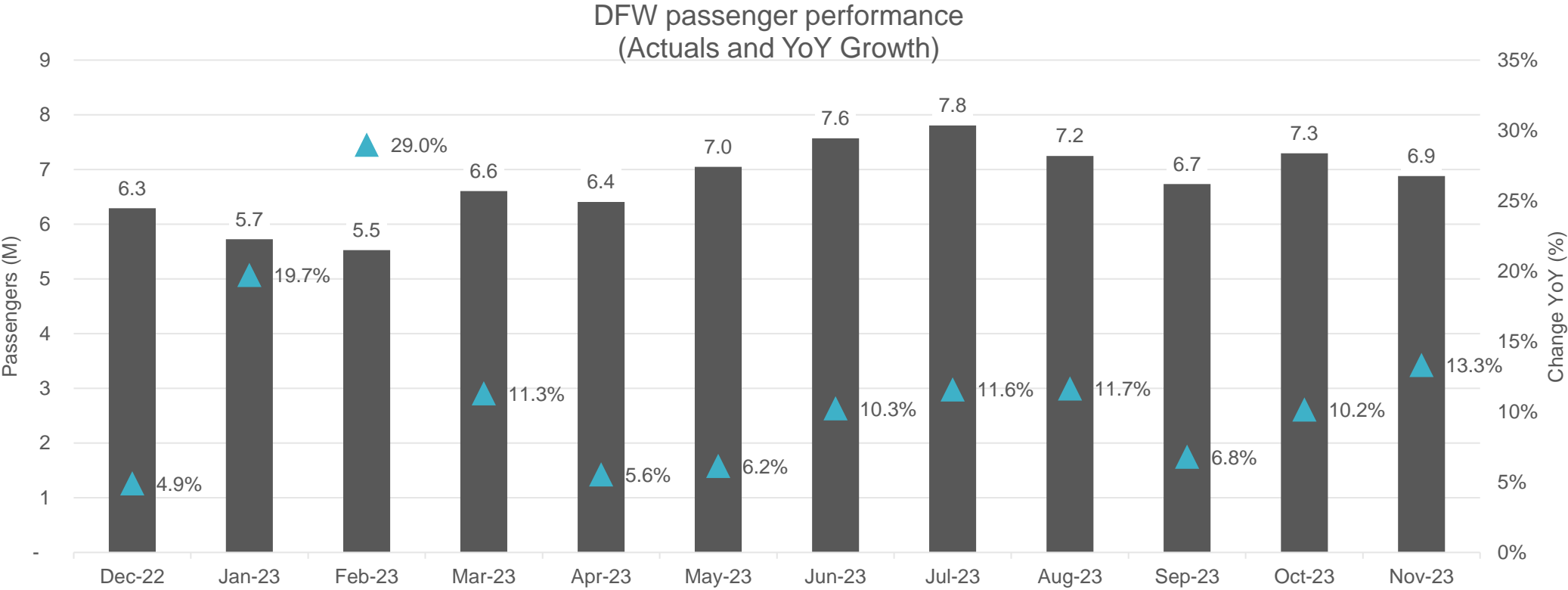
Destinations for major US airports
(YE Dec 2023)



4 new services added in FY24



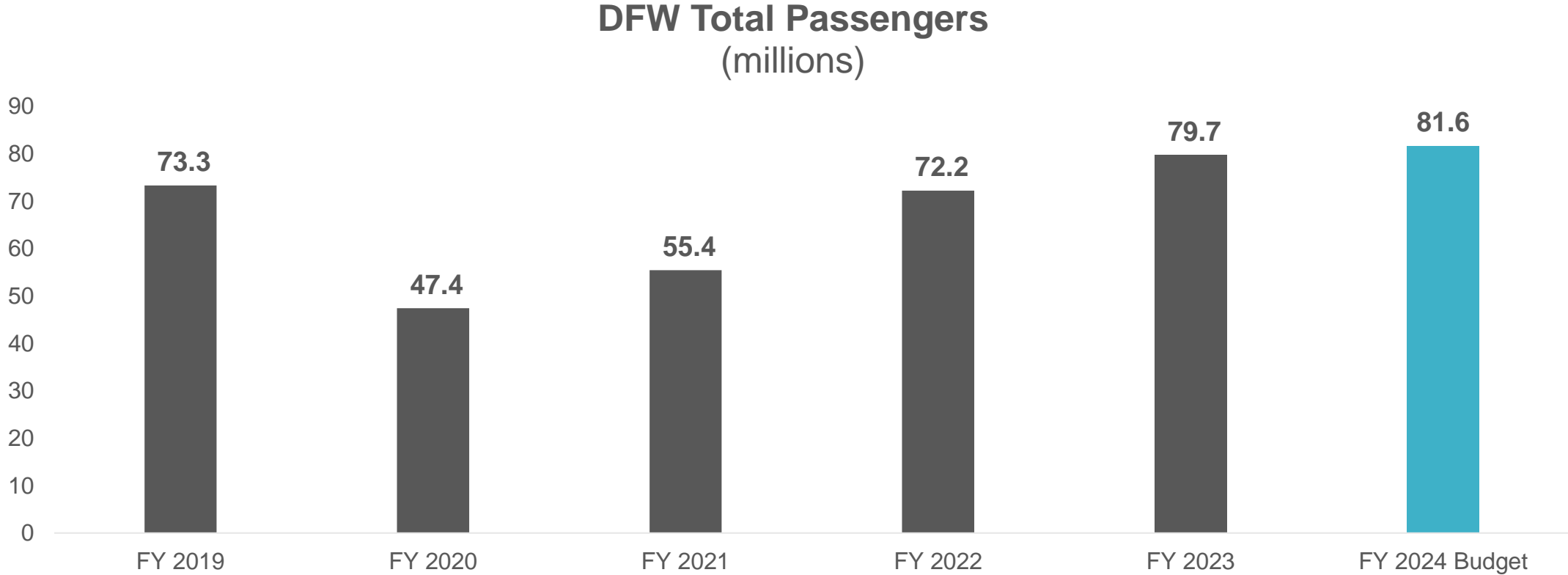
FY24 off to a strong start, averaging 11.8% growth YoY



Source: DFW Internal Statistics



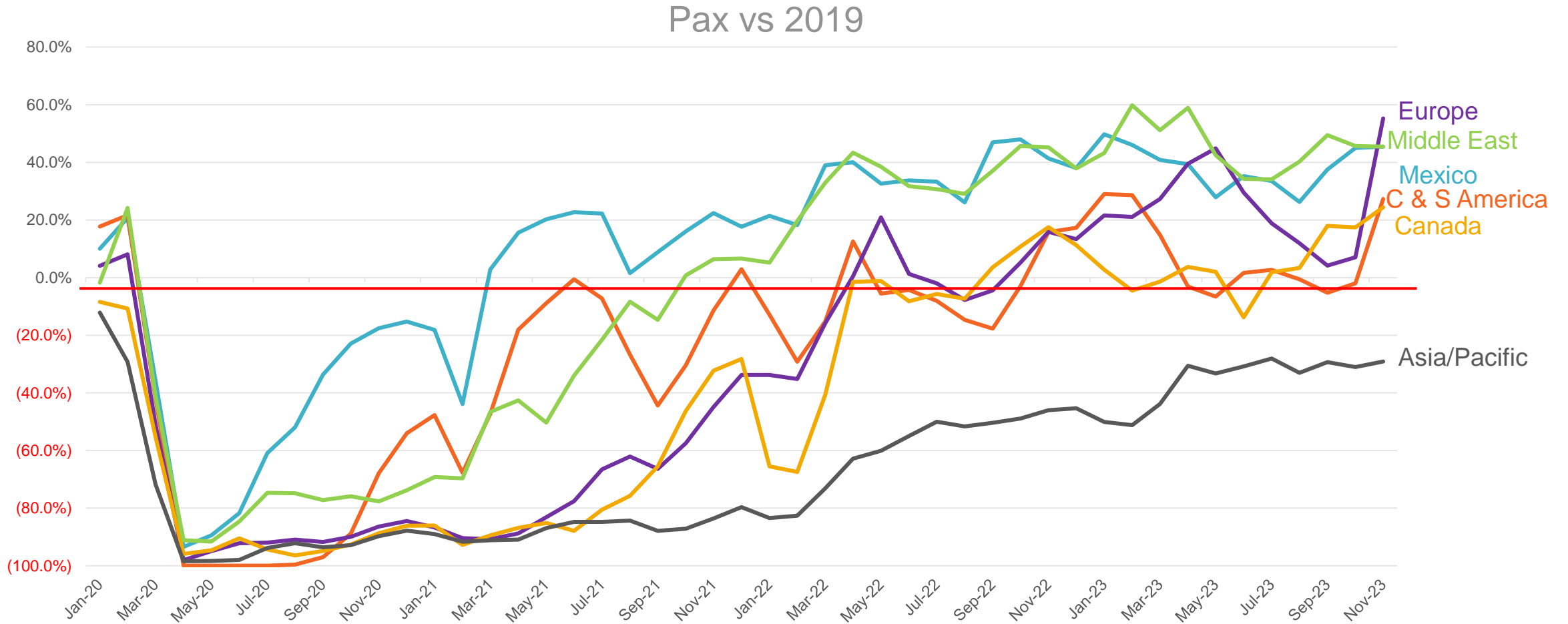
FY24 is projected to be an all time high for DFW



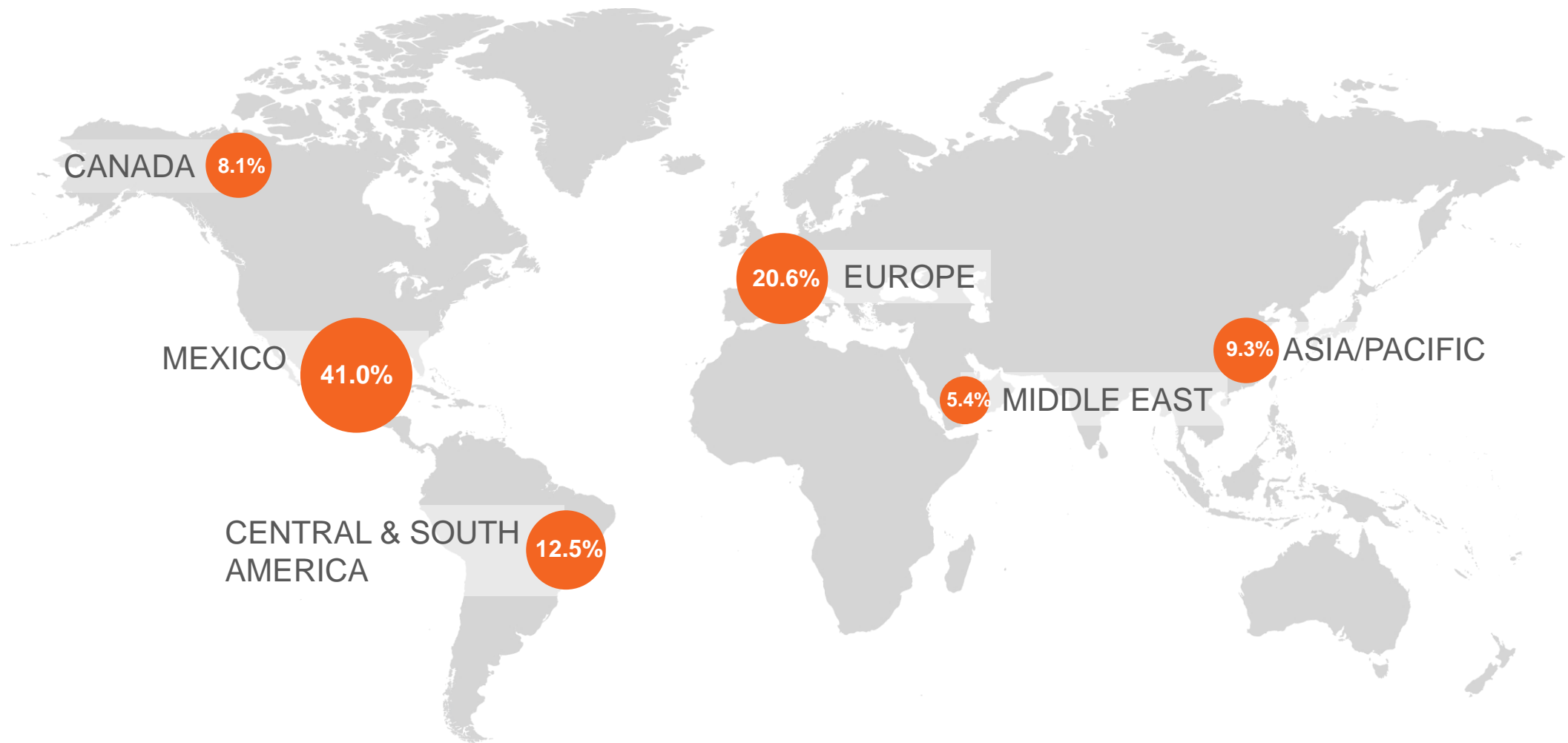
Source: DFW Internal Statistics



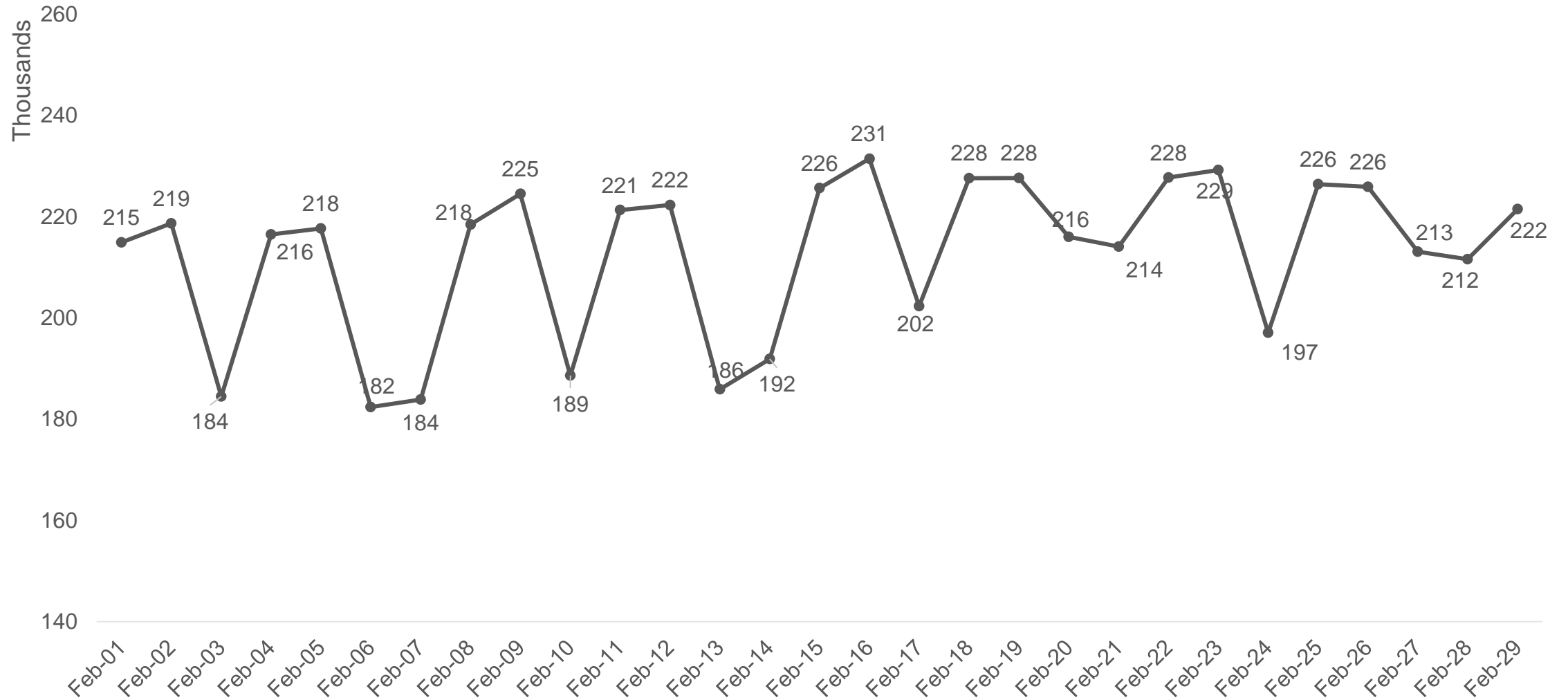
Asia / Pacific remains 29% below 2019 levels



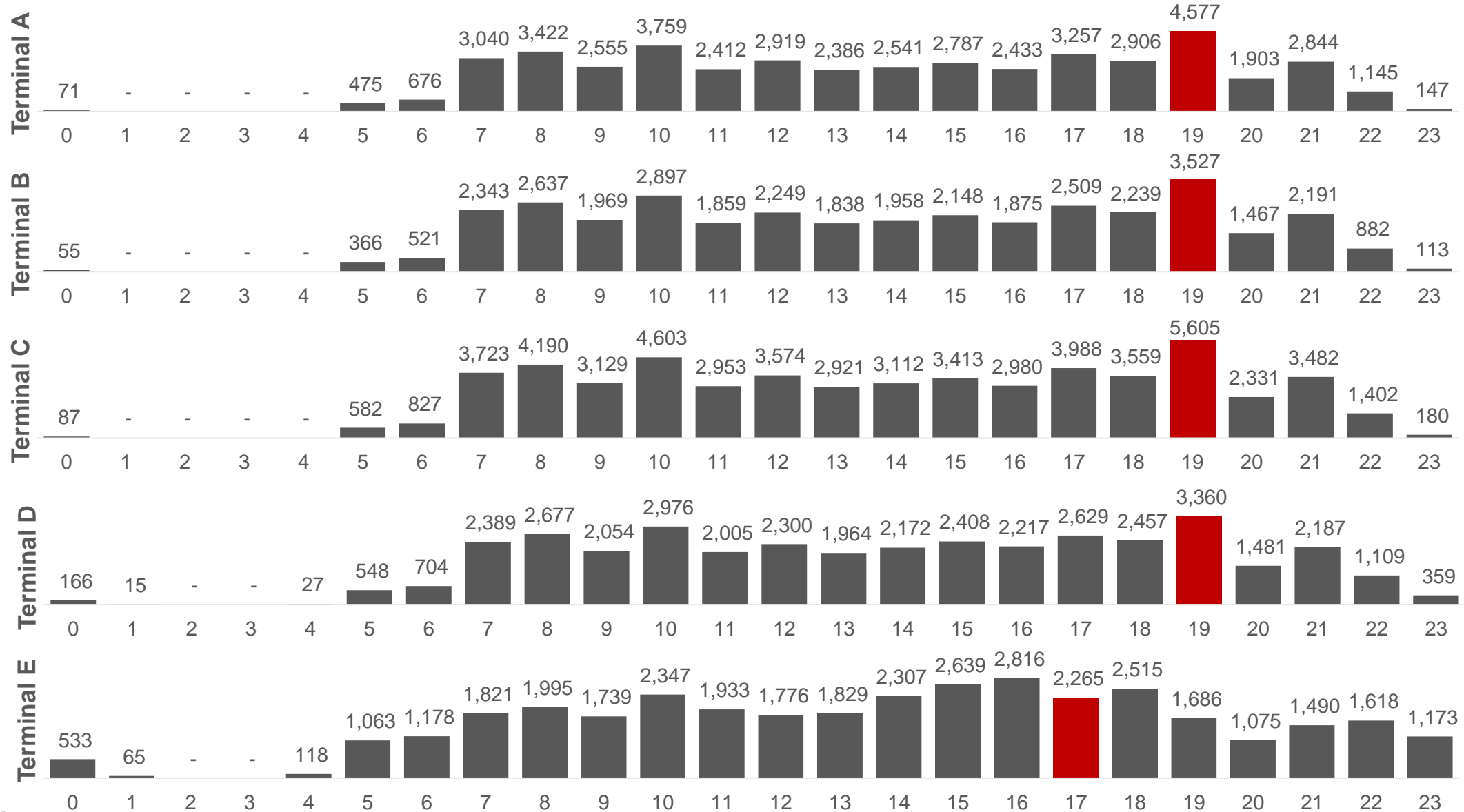
Mexico represents the largest market for all international passengers



6.2M passengers are expected to travel in February, 11.7% above 2023 levels



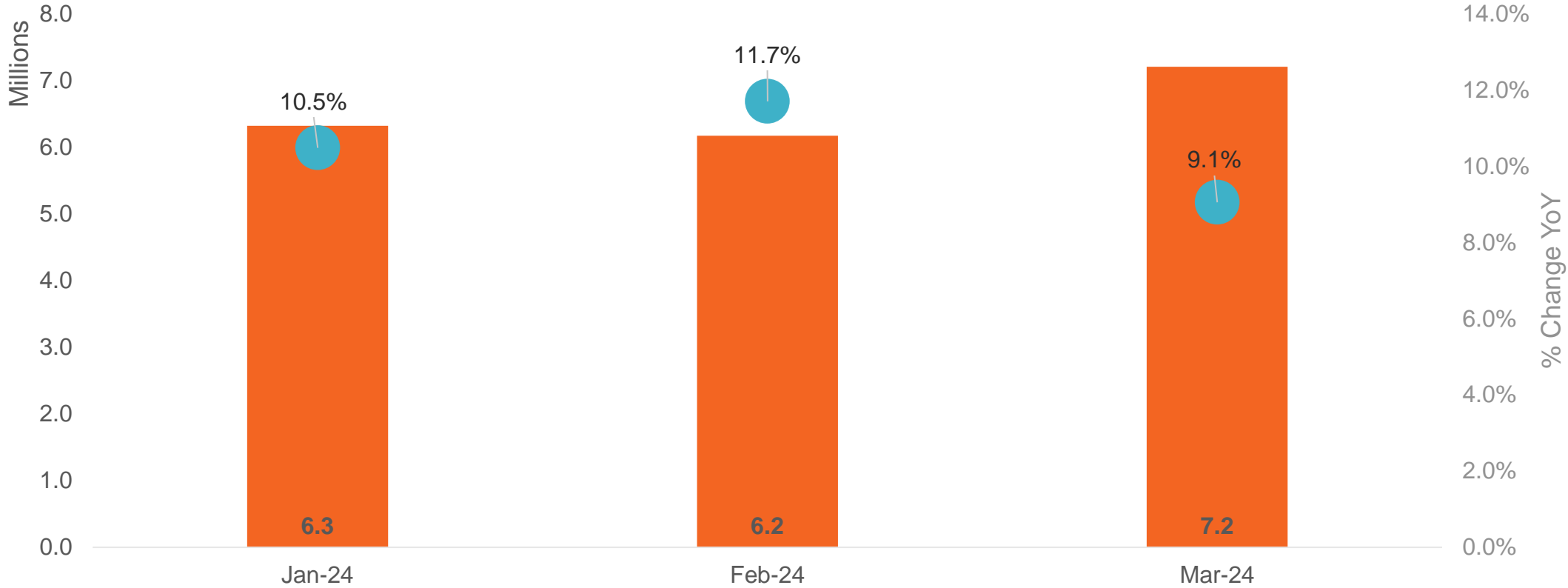
DFW terminal split by hour – February 2024



Source: DFW internal estimates



FY 24 Q2 passengers are projected to continue growth trend



Source: DFW internal estimates





RFP, SBEC, Outreaches

Jennifer Simkins
Assistant Vice President, Concessions

2024 Focus

Multi-Terminal RFP

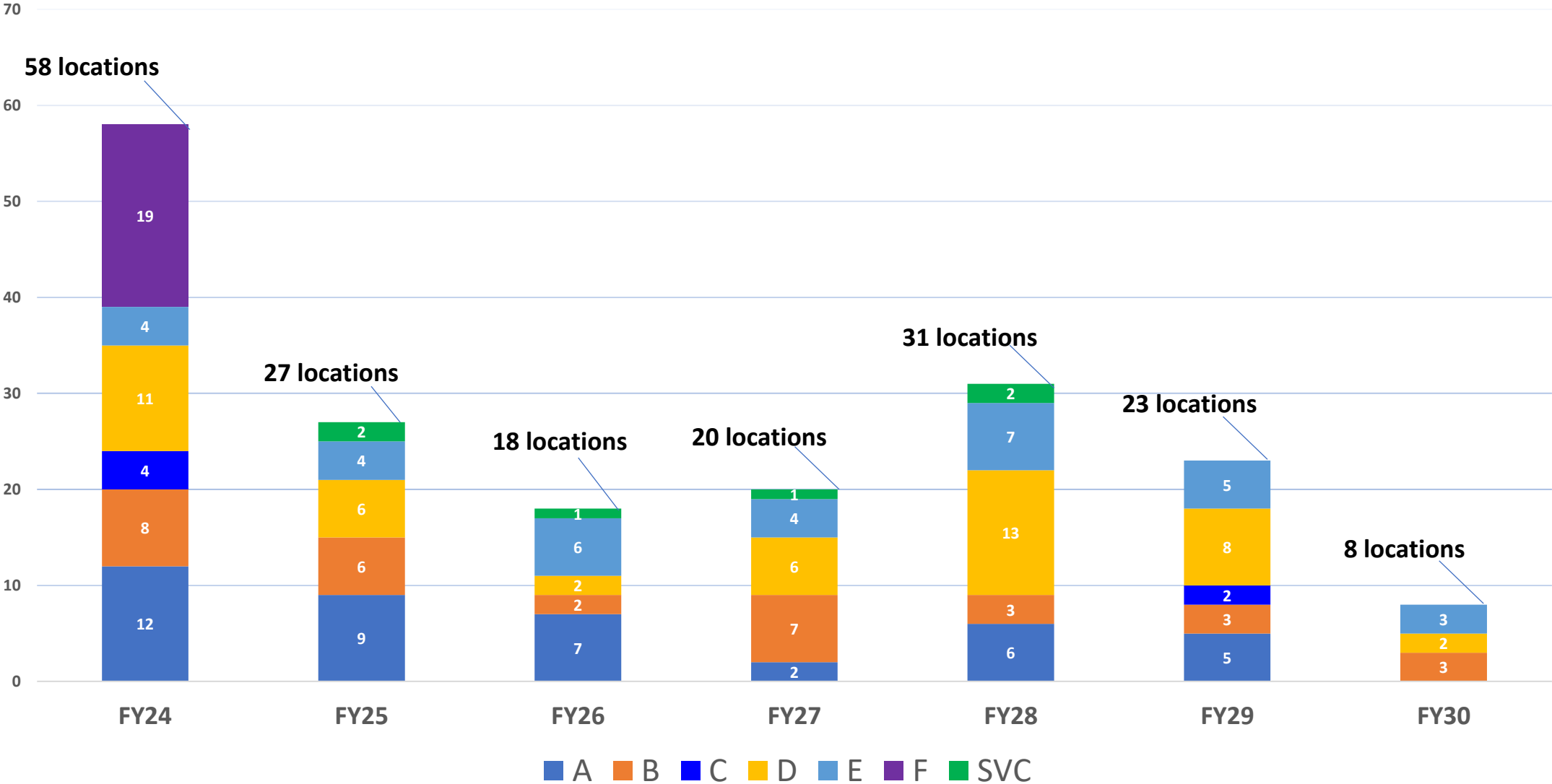
April 2024

Terminal F RFP

Fall/Winter 2024

RFP Outlook FY24 - FY30

Achieve ACDBE Goals and Provide Opportunities for SBEC's



*FY24 includes Piers A & C, Terminal F, and expiring agreements.

Dates and locations Subject to Change



DFW Concessions Events

DFW Outreach / Bonfire Information

February 21st
Hyatt Regency
Terminal C

April
AXN 2024

Summer/Fall 2024

Pre-Proposals

Multi-Terminal RFP
May 1, 2024
Irving Convention
Center

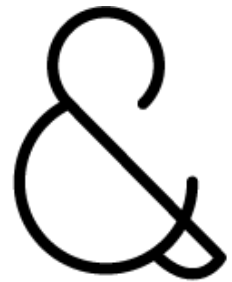
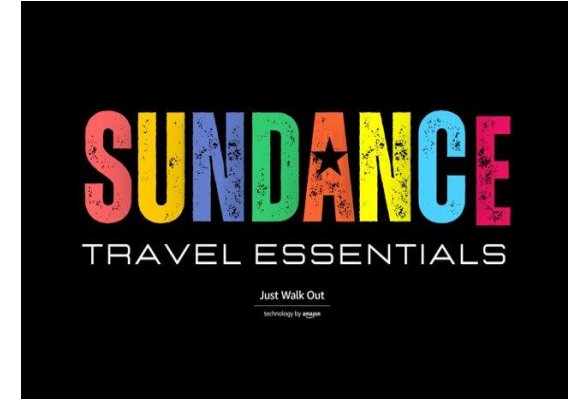
Terminal F RFP
Fall/Winter
2024

SBEC Program

7 SBEC Locations

L'OCCITANE
EN PROVENCE

Bugatti
Bar & Taverna 



AMPERSAND



N O W  T Z K I
R E S T A U R A N T

DFW

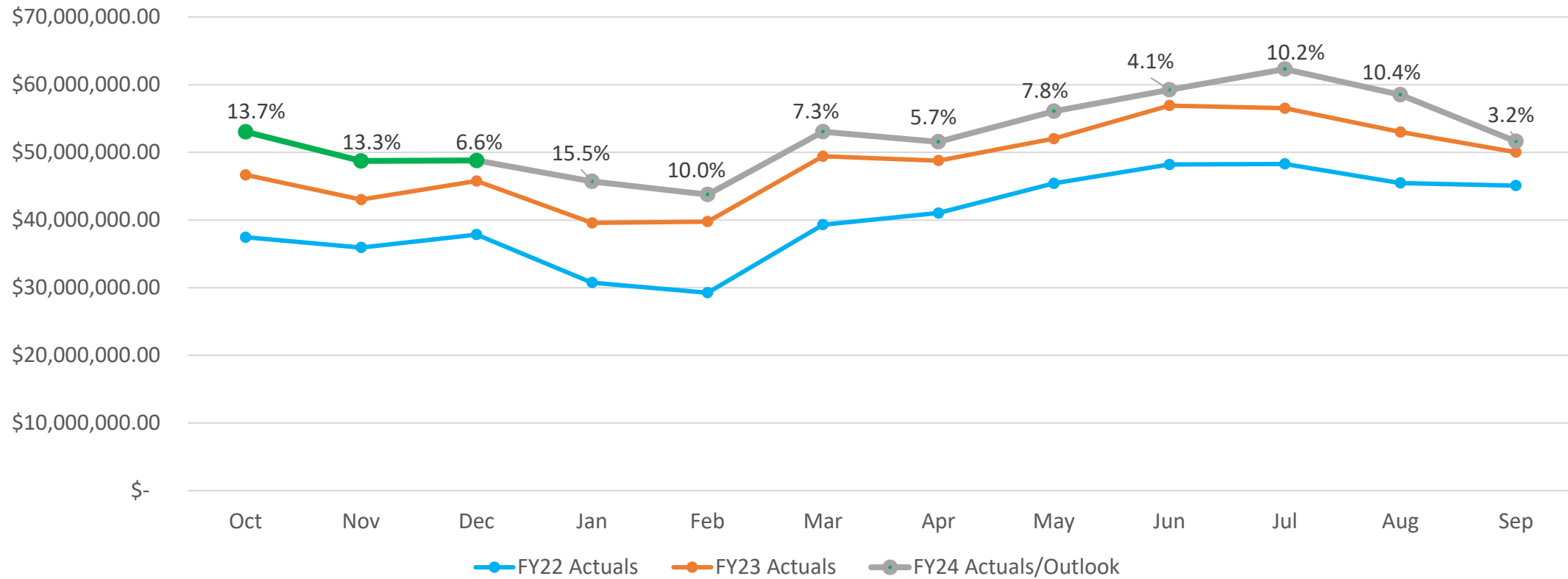


Revenue Projections Grab & Go Goals

Amanda Souza
Assistant Vice President, Concessions

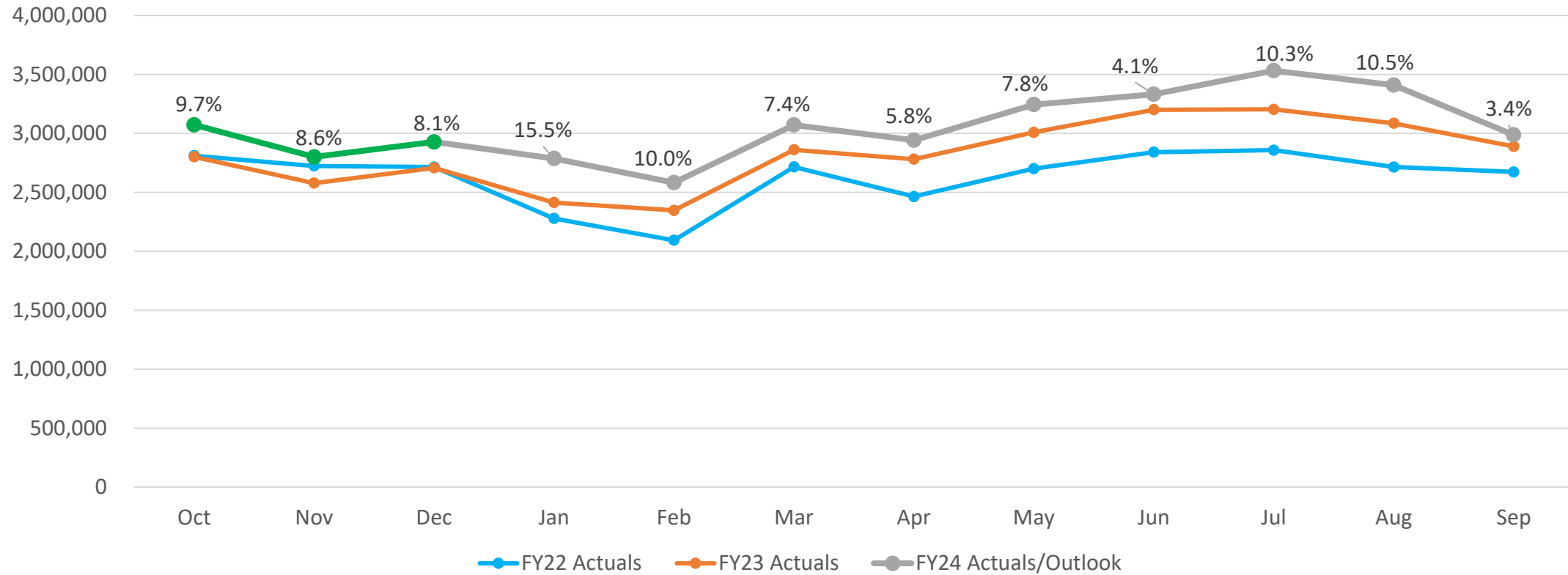
FY24 Total Gross Receipts

FY24 Gross Receipts are up 8.8% vs FY23; up 30.7% over FY22



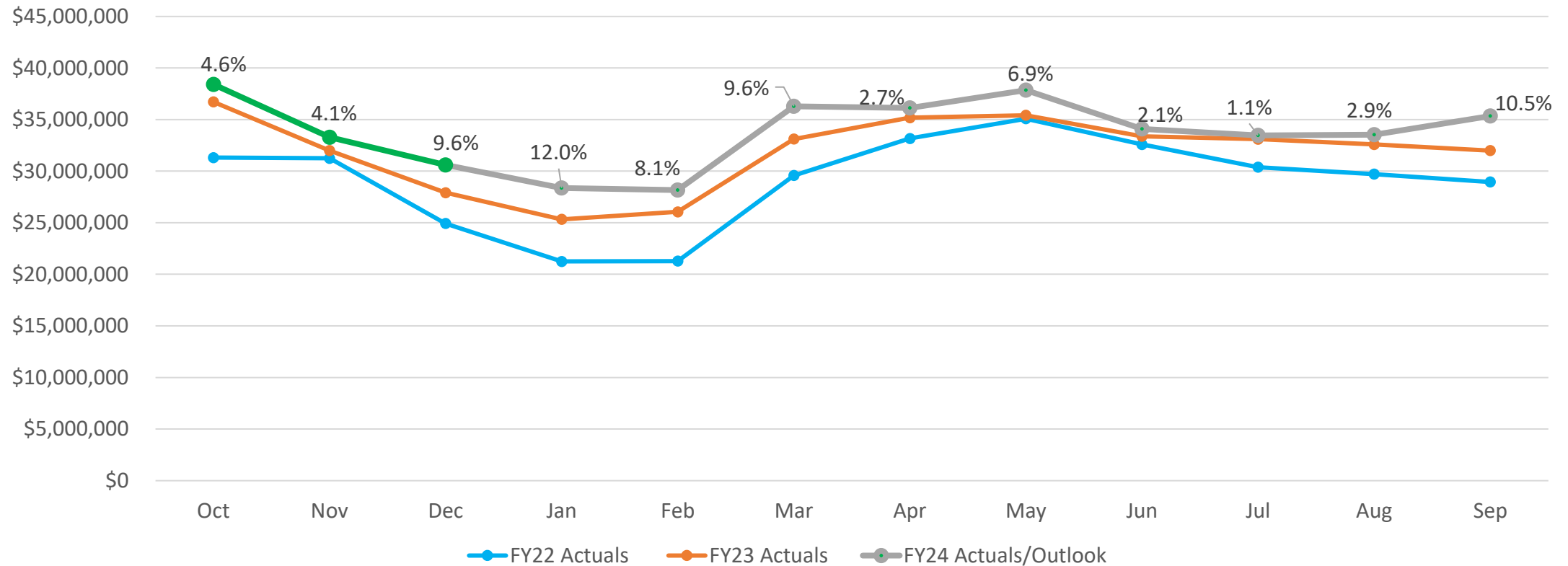
FY24 Total Transactions

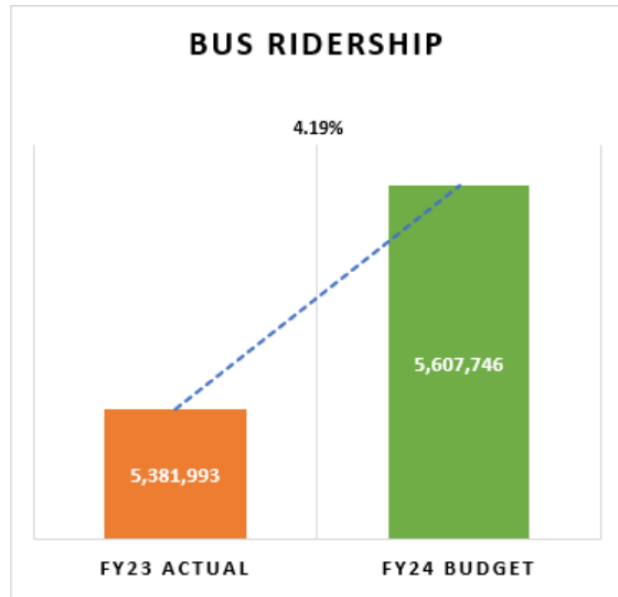
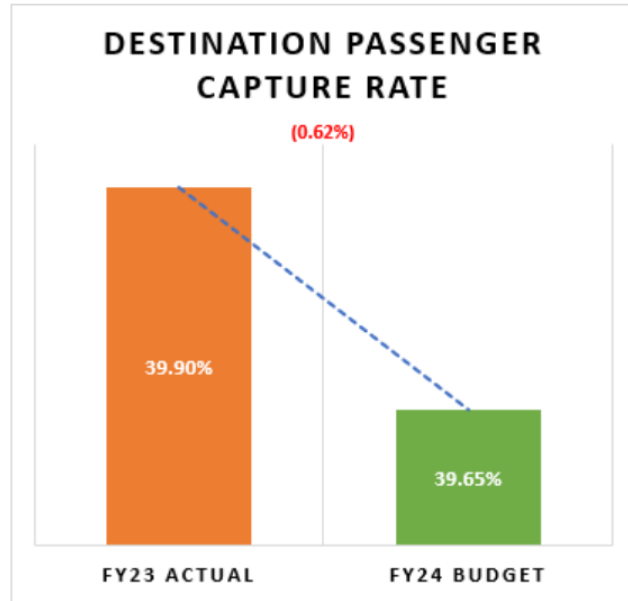
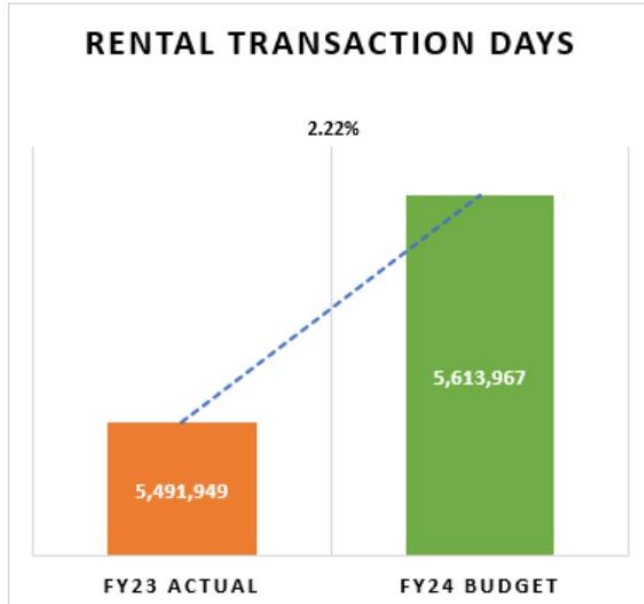
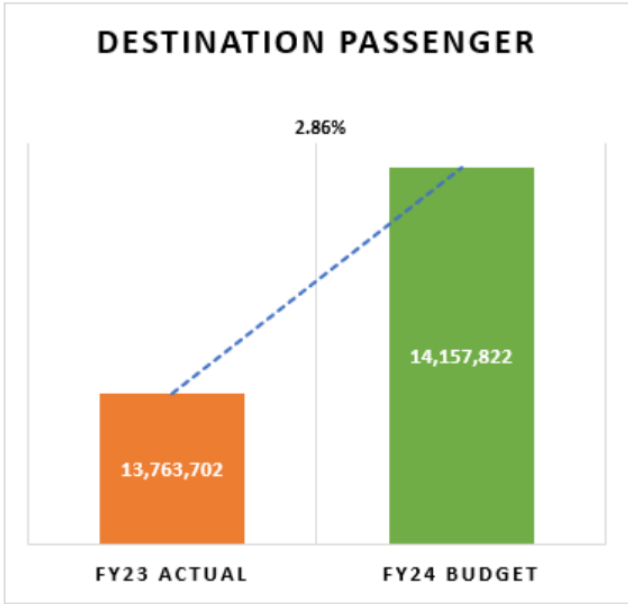
FY24 Transactions are up 8.3% vs FY23; up 16.2% over FY22



FY24 RAC Gross Receipts

FY24 Gross Receipts are up 5.9% vs FY23, up 16.0% vs FY22





Rental Car DEPAX FY23 Actual vs. FY24 Budgeted



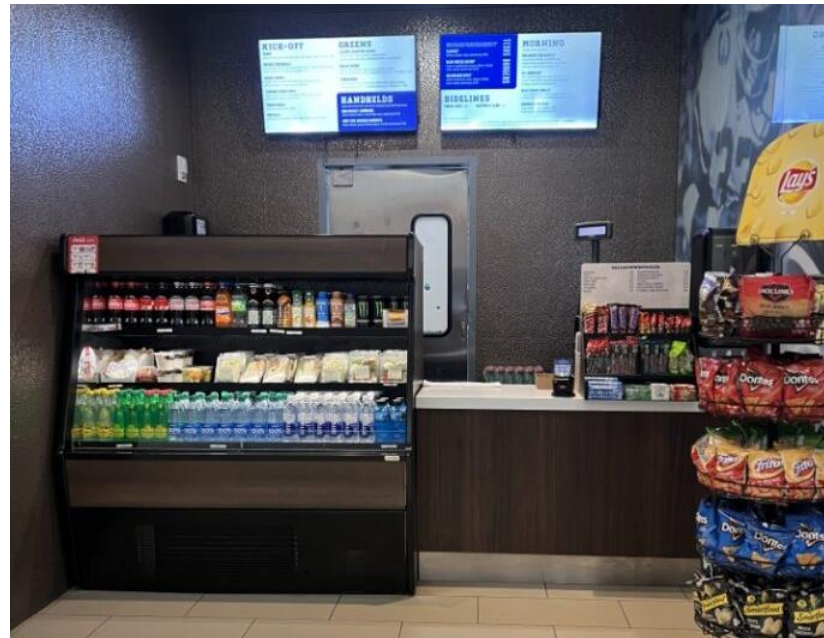
Grab & Go Program

- Amendments Executed
- Goal Set
- POS Integration

Leveraging Grab & Go



Product Variety



Dedicated Point of Sale



Accessibility

Performance Recognition



TGI Fridays - On the Fly



Chili's - To Go



Business Diversity

Tamela Lee
Vice President, BDD



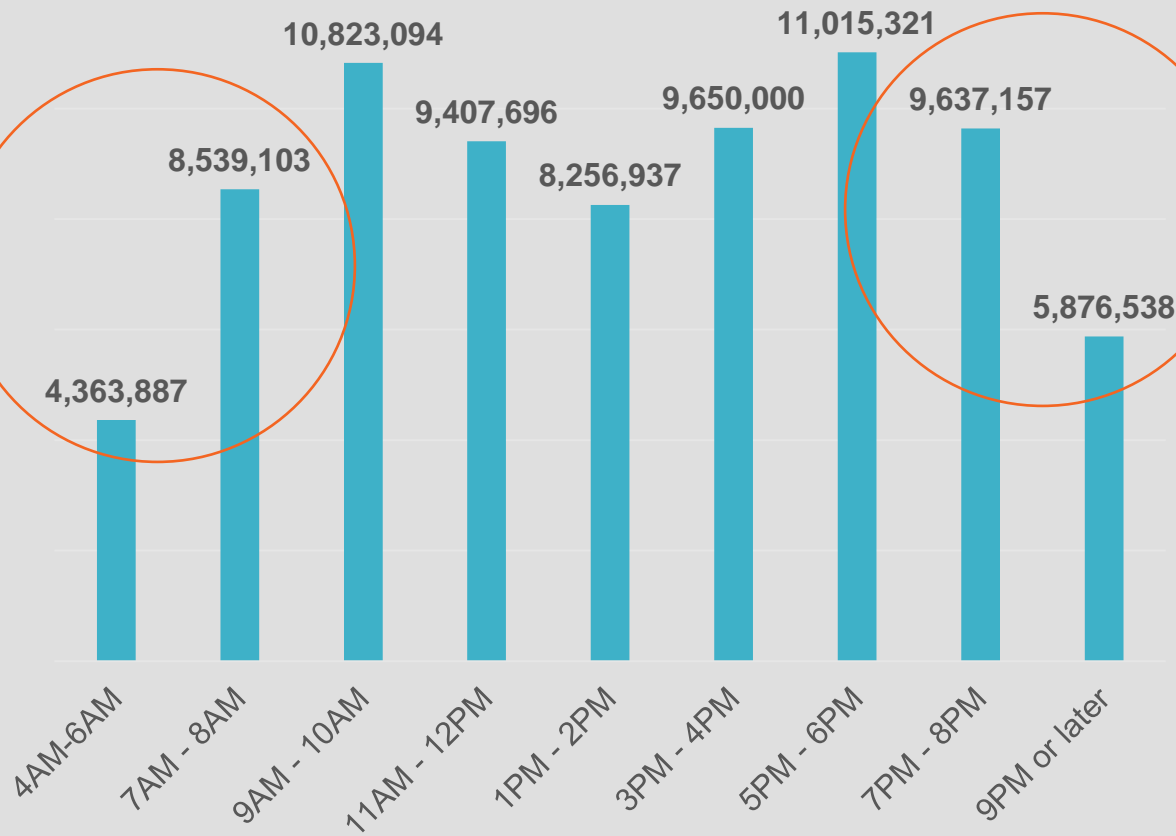
Customer Insights

Sharon McCloskey
Vice President, Customer Experience



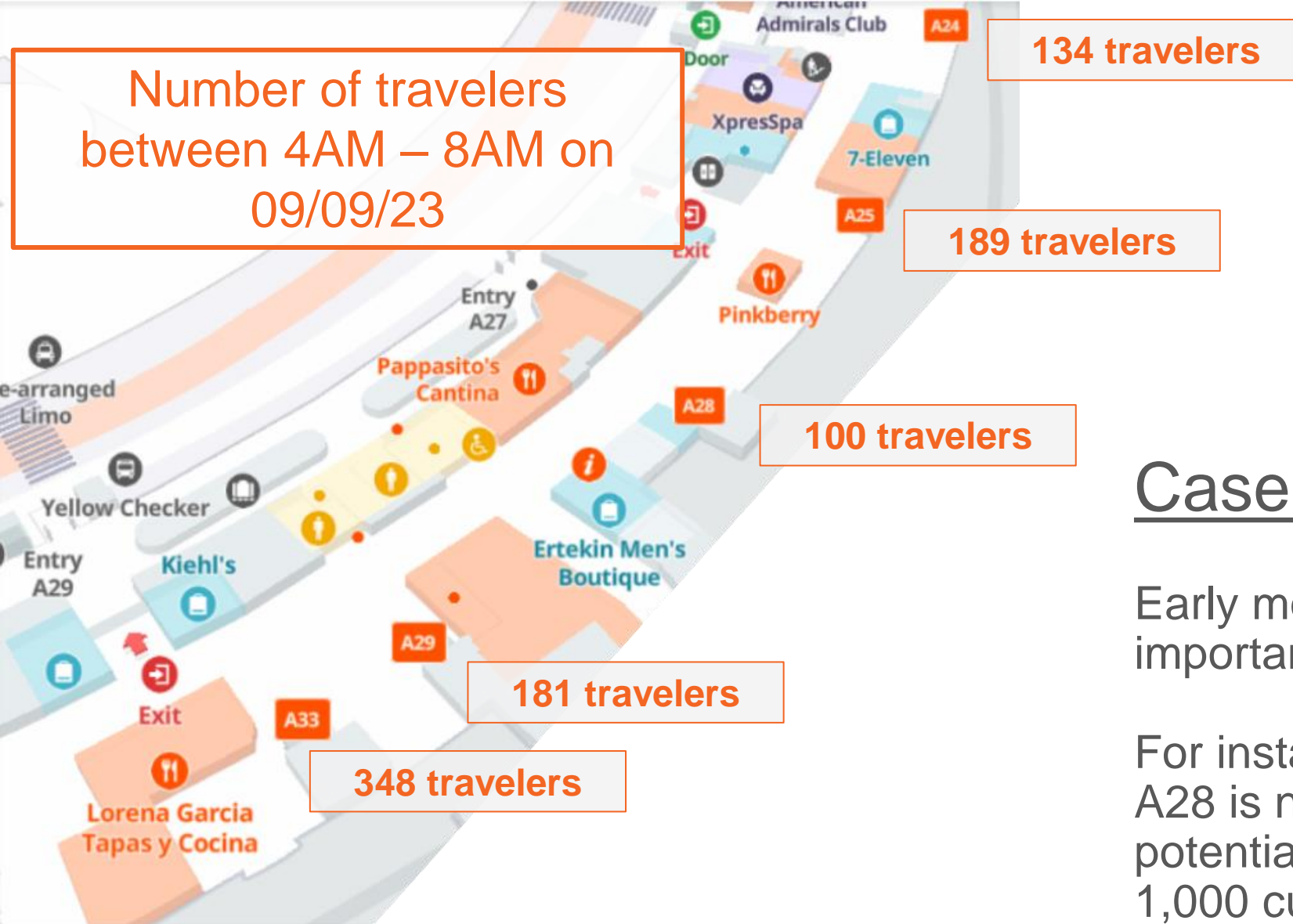
Your continued efforts have helped DFW achieve the 2022 ACI award for “Best Airport over 40 Million travelers in North America”.

DFW Total traveler by Time of Day
FY23



As the world's second busiest airport, we see high volumes of travelers at all times of day and into the night.

Number of travelers
between 4AM – 8AM on
09/09/23



Case Study

Early mornings and evenings are important!

For instance, if a concession near gate A28 is not open in the morning, it could potentially lose out on serving almost 1,000 customers in the five-gate area.

Chick-fil-A
Near Gate C24 • Level 1 •
Terminal C
OPEN

Pappasito's Cantina
Near Gate C19 • Level 1 •
Terminal C
OPEN

Dunkin'
Near Gate C17 • Level 1 •
Terminal C
OPEN

Baskin-Robbins
Near Gate C17 • Level 1 •
Terminal C
OPEN

Maggiano's
Near Gate C17 • Level 1 •
Terminal C
OPEN

NBC-5 Travel Store

OPEN

Near Gate E31 • After Security

Level 1 • Departures / Check-In

Terminal E

To counter stress, it is vital to provide transparency of key traveler-facing airport operations. Doing so can help alleviate stress and contribute to a more positive, relaxed experience.

Thanks to your help, we've been able to set up sensors in many of our concession locations letting travelers know what locations are open.



VISIBILITY



KNOWLEDGE



TIME



CONTROL



MINDSET



OPTIONS

Remember the Customer's Core Needs

If we recognize how travelers perceive different touchpoints in their journey, we can understand those perceptions and address them. This allows us to meet traveler needs throughout the journey.



TIME

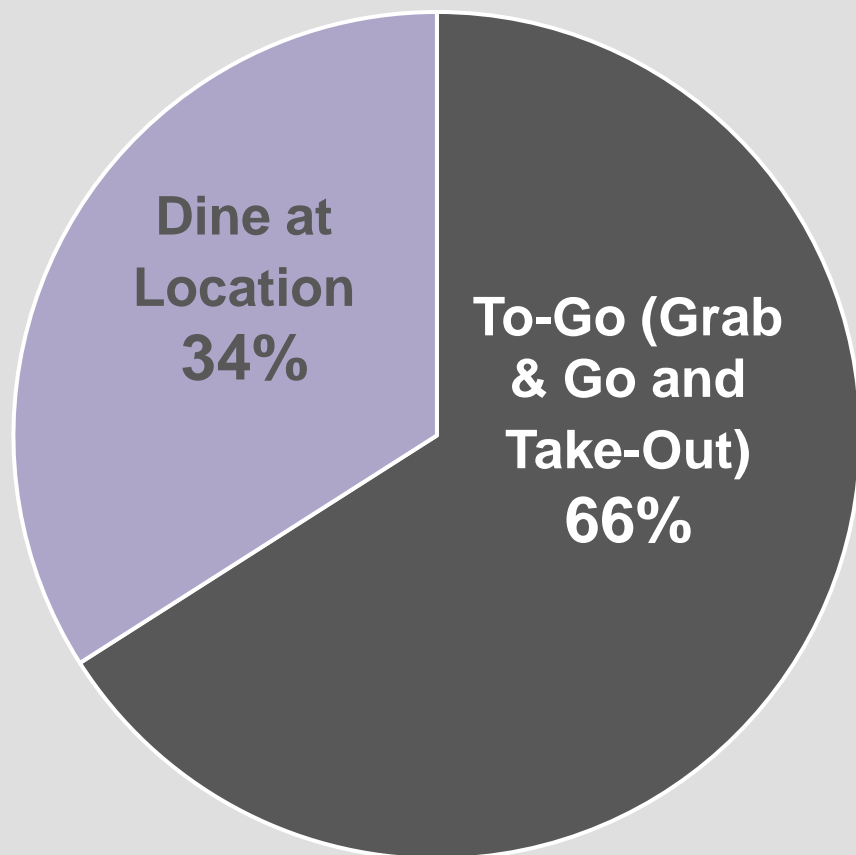


CONTROL

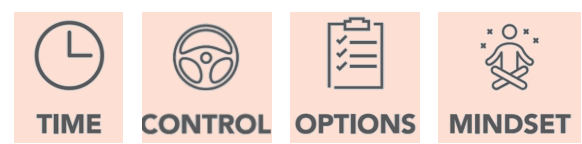


OPTIONS

How did you order your Food & Beverage?



Two-thirds of travelers take their food & beverage to-go, whether by take-out or Grab & Go.



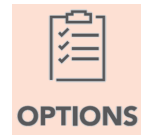
The On-The-Go Mindset

Based on surveys with our customers, a recurring theme among travelers is the desire for **convenient**, on-the-go choices. With many rushing to catch their flights, the availability of **fast and easily purchasable** on-the-go food, beverage and retail options enhances their overall airport experience.





VISIBILITY



OPTIONS



MINDSET

Food & Beverage Decision Factors Average Ratings



“Clean, Working, Friendly” continue to be the foundation of travelers’ needs.



VISIBILITY



OPTIONS



MINDSET

Retail Decision Factors Average Ratings

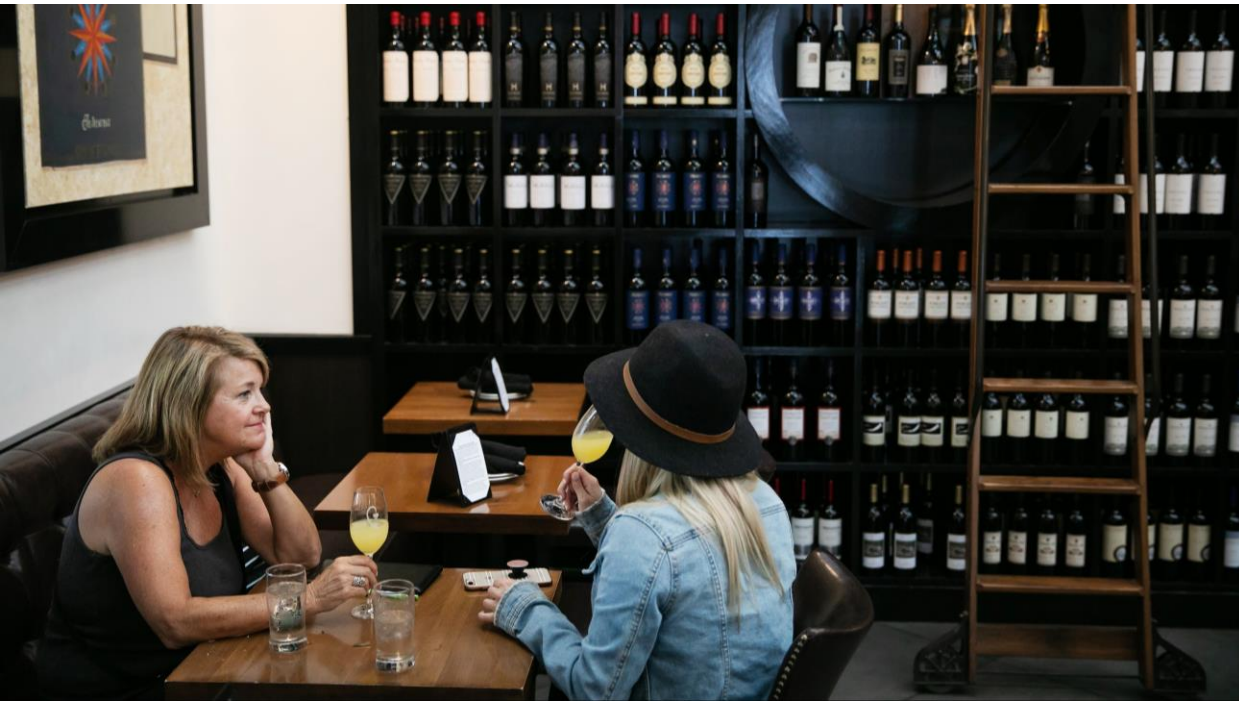


When it comes to retail, travelers also expect those same foundational needs to be met. Additionally, they expect an **efficient and convenient** shopping experience.



Summary

- Transparency to our travelers – such as notifying when opened or closed – is vital for improving their overall experience.
- Most travelers have an **on-the-go** mindset and want quick, convenient options.
- The foundational needs of “**Clean, Working, Friendly**” are still very important to our customers in their decision-making process.





Hidden Disabilities Program

Courtenay Shorter
Senior Manager, Risk Management



Program Background

Americans with Disabilities Act (ADA) & Hidden Disabilities

- DFW has engaged consultants to understand how we can better serve those with both visible and hidden disabilities.
- We have actively engaged various community groups and advocates of those with disabilities to gain perspective from a traveler's point of view.
- After evaluating other airports, we identified several initiatives for implementation at DFW to enhance the customer experience.

DFW ADA & Hidden Disabilities

Current Initiatives

- DFW Disability Advocate Workshop – Held on November 14, 2023 to gain a better understanding of the travel experience for those with Hidden Disabilities. Workshop was hosted by Innovation. Risk Management and Customer Experience participated.
- Evaluation of other airports & the programs they offer. Gap analysis completed to understand how DFW compared to other airports. Other programs & services identified include adult changing tables, hearing loops within the terminal, and the Sunflower Lanyard program.
- From this evaluation the following were initiatives that DFW will focus on in 2024
 - Development of a DFW Hidden Disability Advisory group (initial stages)
 - Sensory Rooms (phased approach beginning 2024 in Terminal D)
 - Promotion of the Sunflower Lanyard program (initial stages)

Sunflower Hidden Disabilities Program

Background

- **The sunflower is the globally recognized symbol for non-visible or hidden disabilities**
- **Provides a cue to others that the individual may need extra support or time at work or in public settings**
- **No cost to the customer and lanyards will be provided upon request (via mail or in-person)**

Sunflower Hidden Disabilities Program

Success Factors Identified in Other Airports

- **Communication – Internal and External Stakeholders**
- **Training – Providing Information on programs and airport initiatives such as Sunflower Hidden Disability**
- **Consistency of Information - Ensuring that all customer facing staff provide the same information.**



Next Steps

We Need Your Help

- **Business Partner Rollout** – Subsequent rollout to business partners such as Concessionaires, Airlines, TSA, and Prospect.
- Training – Providing training for all customer facing staff for awareness of the program.
- Provide feedback on the program – We welcome your thoughts on ways to improve the program.



Excellence Awards

Jennifer Simkins
Assistant Vice President, Concessions



Excellence Awards by the numbers

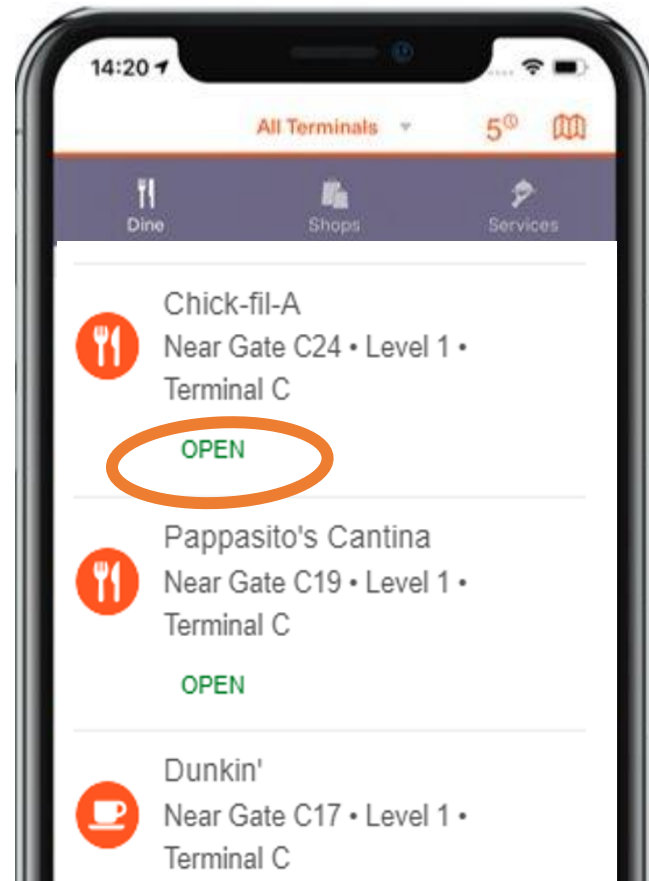


Next Event: December 12, 2024



Compliance

Jennifer Simkins
Assistant Vice President, Concessions



OPEN ...

Openings		
Early Openings	0 min - 15 min Late	> 30 min Late
29	14	9

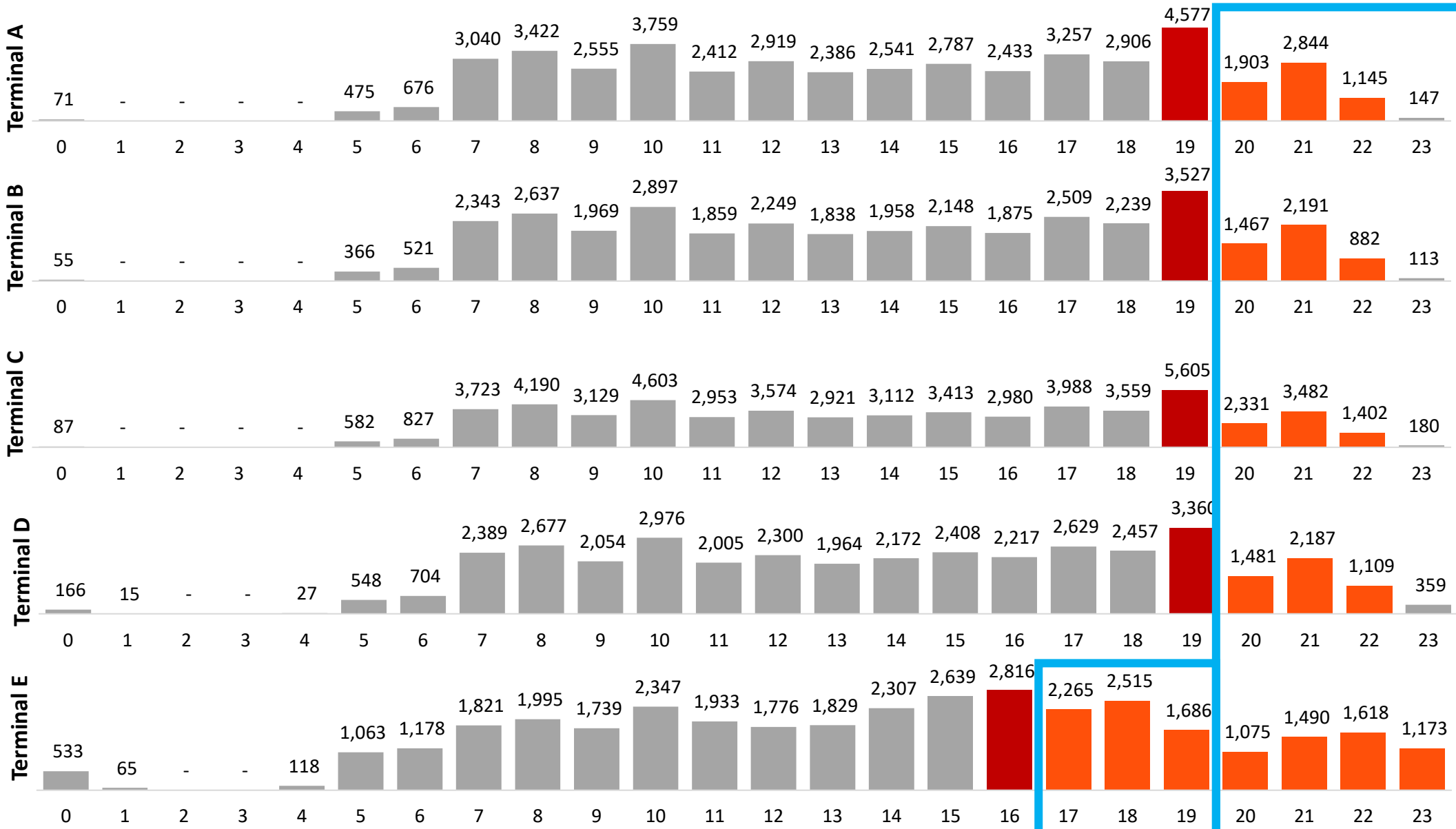
Closures			
Late Closures	0 min - 15 min Early	16 min - 30 min Early	> 30 min Early
12	12	5	23

Rental Cars

Discover the area on your time and rent a car at our 24/7 rental car facility.

[Rent a Car >](#)

Flight Banking – February 2024



26k PAX
After
8pm

Source: DFW internal estimates



Mystery Shop - Terminals & RAC

Employee Recognition

Employees who receive a 90% or above on their mystery shop Standards Score.



The DFW Way Training Video will help your employees understand the DFW Standards



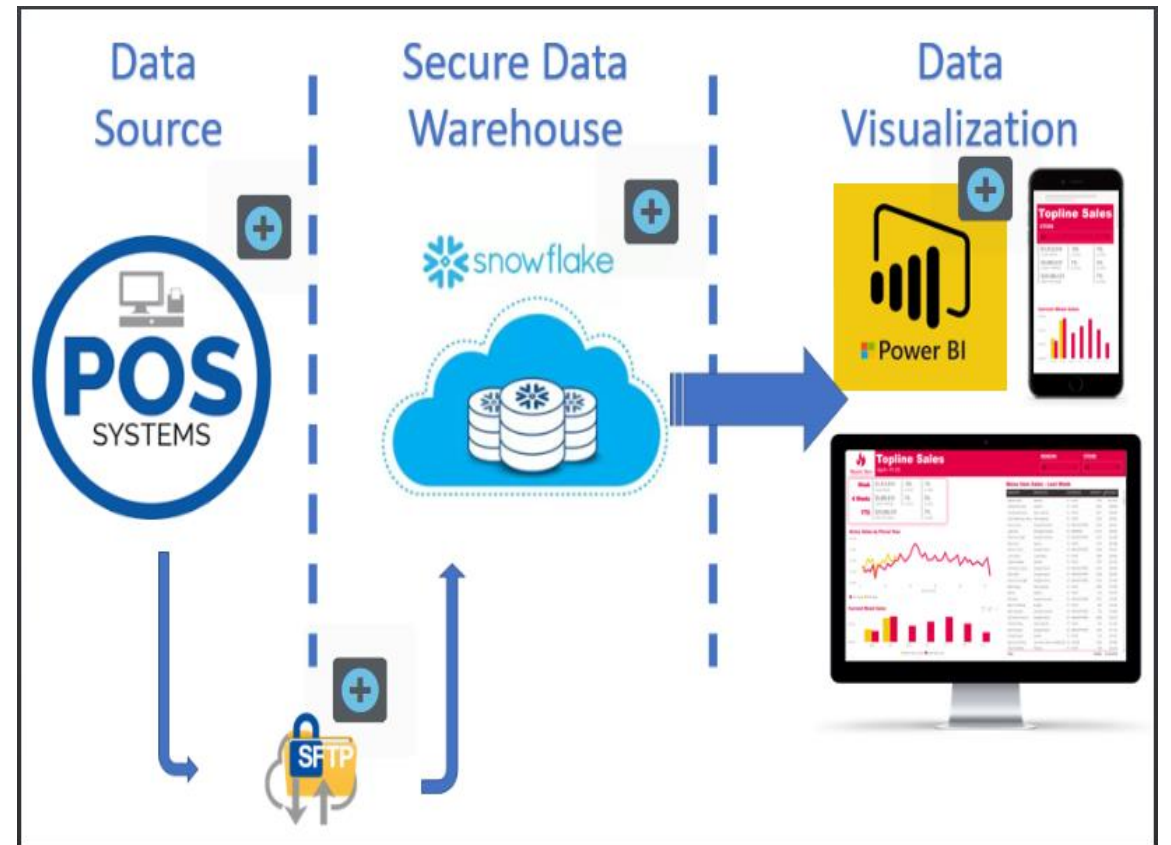
POS Integration Vendor Tracking

Zenola Campbell
Vice President, Concessions

POS Data Sources



Integrated Data Flow



Delivery Dock Application

Concessions Delivery Dock Automation Dashboard (CDDA)

Date: 05-01-23

DFW SECURITY MERCHANDISE SCREENING LOG 1 A Dock Checkpoint

Time	Company	Destination (Terminal & Store)	Badge Holder First & Last Name	SIDA Badge Number	Officer Name	Badge #
0409	World Duty Free	A12	First Terryon	6491665	mistica aguero	705176
			Last Deberry			
0555	Panera	A34	First Hisham	701660	mistica aguero	705176
			Last Tang			
0618	Oak Farms	Panera	First Agustin	689205	mistica aguero	70516
			Last Garcia			
0618	Oak Farms	Papasitos	First Agustin	689205	mistica aguero	705176
			Last Garcia			
0640	Produce Brothers	C11, 21, C, 20, 200	First Emmanuel	685081	mistica aguero	705176
			Last Barcenas			
0645	Ben E Keith	C 221, 30C	First Kevin	668465	mistica aguero	705176
			Last Fuller			
0640	Brothers Produce	23, 30, 30C	First Emmanuel	685081	mistica aguero	705176
			Last Barcenas			
0750	Dick Keys	A10-33L AM-743	First Juan	699405	mistica aguero	705176
			Last Cano			
0752	Canteen Vending	A 100	First Joshua	663599	mistica aguero	705176
			Last Rockett			
0757	Ben E Keith	C11 Blue	First Kevin	668465	mistica aguero	705176
			Last Fuller			
0846	Andrews	Mediterrean	First Mauricio	676835	mistica aguero	705176
			Last Gonzales			
0902	Ben E Keith	A300y AM-121 Friday	First Kevin	668465	mistica aguero	705176
			Last Fuller			
0915	Canteen Vending	A 100	First Joshua	663599	mistica aguero	705176
			Last Rockett			

This form may not be substituted for another Modified 5/20/2018

Scheduler Dashboard

Explore / Concessions / Concessions Delivery Dock Automation Dashboard / Scheduler Dashboard

Delivered Dashboard | Missed Dashboard | Scheduler Dashboard | Export Instructions

Day of Week (sd) | Schedule Status | Terminal (sd) | Destination (sd) | Company | Company Status | Contact Status

Scheduler

Dock (sd)	Terminal (s)	Gate (sd)	Destination (sd)	Company	Company St.	Contact (sd)	Contact Sta.	Phone	Schedule Status	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
A39	C	C11	7 Eleven	Fed Ex	Active	Number, Maim	Active	18007425877	Active Schedule		X	X			X	
A39	A	A22	American Airlines Admiral	Andrews	Active	Diaz, Fernando	Active	323-547-8101	Active Schedule	X	X	X			X	
A39	C	C22	American Airlines Admiral	Andrews	Active	Diaz, Fernando	Active	323-547-8101	Active Schedule	X	X	X			X	
A39	A	A22	American Airlines Admiral	Ben E Keith	Active	Boyd, Chuck	Active	817-759-6518	Active Schedule	X			X	X		
A39	B	B06	American Airlines Admiral	Ben E Keith	Active	Boyd, Chuck	Active	817-759-6518	Active Schedule	X			X	X		
A39	C	C22	American Airlines Admiral	Ben E Keith	Active	Boyd, Chuck	Active	817-759-6518	Active Schedule	X			X	X		
A39	D	D22	American Airlines Admiral	Ben E Keith	Active	Boyd, Chuck	Active	817-759-6518	Active Schedule	X			X	X		
A39	A	A22	American Airlines Admiral	Host	Active	Harvey, Elvis	Active	901-326-7817	Active Schedule	X	X	X	X	X	X	
A39	C	C22	American Airlines Admiral	Sigets	Active	Ross, Bill	Active	214-734-0916	Active Schedule	X	X	X	X	X	X	
A39	A	A21	Auntie Anne's	PFG	Active	Leskar, Wendy	Active	800-465-4060	Active Schedule			X		X	X	
A39	C	C22	Banh Shop	Brothers Produce	Active	Lopez, Isela	Active	214-429-6666	Active Schedule		X		X	X	X	
A39	C	C11	Bleu Mediterranean Bar K.	Andrews	Active	Diaz, Fernando	Active	323-547-8101	Active Schedule	X			X	X	X	
A39	C	C11	Bleu Mediterranean Bar K.	Ben E Keith	Active	Boyd, Chuck	Active	817-759-6518	Active Schedule	X			X	X	X	
A39	C	C11	Bleu Mediterranean Bar K.	Frog and Scorpion	Active	N/A, N/A	Active	000000000	Active Schedule			X		X	X	
A39	C	C11	Bleu Mediterranean Bar K.	Sigets	Active	Ross, Bill	Active	214-734-0916	Active Schedule		X		X	X	X	
A39	A	A25	Brookstone	World Duty Free	Active	Fino, Rob	Active	2147349916	Active Schedule	X	X	X	X	X	X	
A39	A	A09-A17	Canteen Vending Term A.	Canteen Vending	Active	Carter, Charles	Active	214-418-1606	Active Schedule	X	X	X	X	X	X	
A39	A	A17-A28	Canteen Vending Term A.	Canteen Vending	Active	Carter, Charles	Active	214-418-1606	Active Schedule	X	X	X	X	X	X	
A39	A	A28-A39	Canteen Vending Term A.	Canteen Vending	Active	Carter, Charles	Active	214-418-1606	Active Schedule	X	X	X	X	X	X	
A39	A	A09-A17	Canteen Vending Term A.L.	Canteen Vending	Active	Carter, Charles	Active	214-418-1606	Active Schedule	X	X	X	X	X	X	
A39	A	A17-A28	Canteen Vending Term A.L.	Canteen Vending	Active	Carter, Charles	Active	214-418-1606	Active Schedule	X	X	X	X	X	X	
A39	A	A28-A39	Canteen Vending Term A.L.	Canteen Vending	Active	Carter, Charles	Active	214-418-1606	Active Schedule	X	X	X	X	X	X	
A39	D	D24	Cantina Laredo	Andrews	Active	Diaz, Fernando	Active	323-547-8101	Active Schedule	X	X	X	X	X	X	
A39	B	B34	Cantina Laredo	Ben E Keith	Active	Boyd, Chuck	Active	817-759-6518	Active Schedule				X	X	X	
A39	B	B34	Cantina Laredo	Four Leaf	Active	Polanco, Mario	Active	760-235-9122	Active Schedule	X	X			X	X	
A39	B	B34	Cantina Laredo	Pop Restaurant	Active	Luna, Robert	Active	4694019677	Active Schedule			X		X	X	
A39	C	C25	Chick-Fil-A	Brothers Produce	Active	Lopez, Isela	Active	214-429-6666	Active Schedule		X		X	X	X	
A39	C	C25	Chick-Fil-A	HSB M2 Concepts	Active	Mickens, Ray	Active	8177420303	Active Schedule		X		X	X	X	
A39	C	C33	Chili's	Andrews	Active	Diaz, Fernando	Active	323-547-8101	Active Schedule		X	X	X	X	X	
A39	A	A20	CNBC News	Parades	Active	Miller, Curtis	Active	9728391170	Active Schedule	X	X	X	X	X	X	
A39	B	B34	Cantina Laredo	Andrews	Active	Diaz, Fernando	Active	323-547-8101	Active Schedule		X	X	X	X	X	
A39	B	B34	Cantina Laredo	Ben E Keith	Active	Boyd, Chuck	Active	817-759-6518	Active Schedule		X		X	X	X	

Before

After

Raffle Drawing

Thank You

2024 Concessions Forum
Satisfaction Survey

