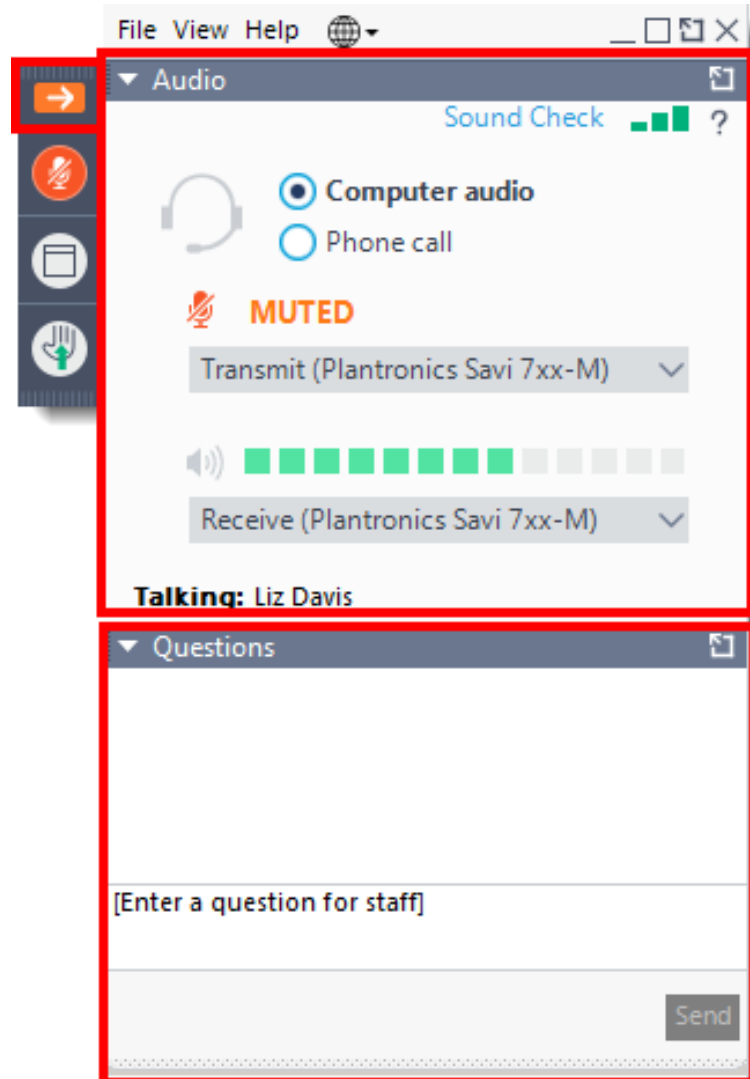
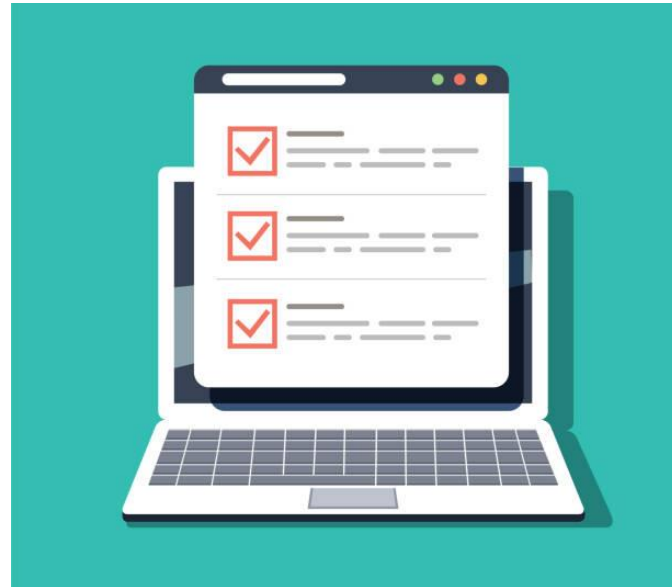

Concessions Webinar Spring Forward to Spring Break

March 10, 2022

Go To Webinar Housekeeping



Please take the short survey at the end of this webinar



Welcome

Zenola Campbell
Vice President, Concessions



Agenda

Welcome

COVID-19 Update

Performance Update

Employee Recognition

Operations Update

#OneDFW

BDD Update

Recruitment Marketing

Air Services Update

Closing

Dustin Jaynes

Kevin Lemmons

Zenola Campbell

Zenola Campbell

Megan Bozarth

Tamela Lee

Martin Rubinstein

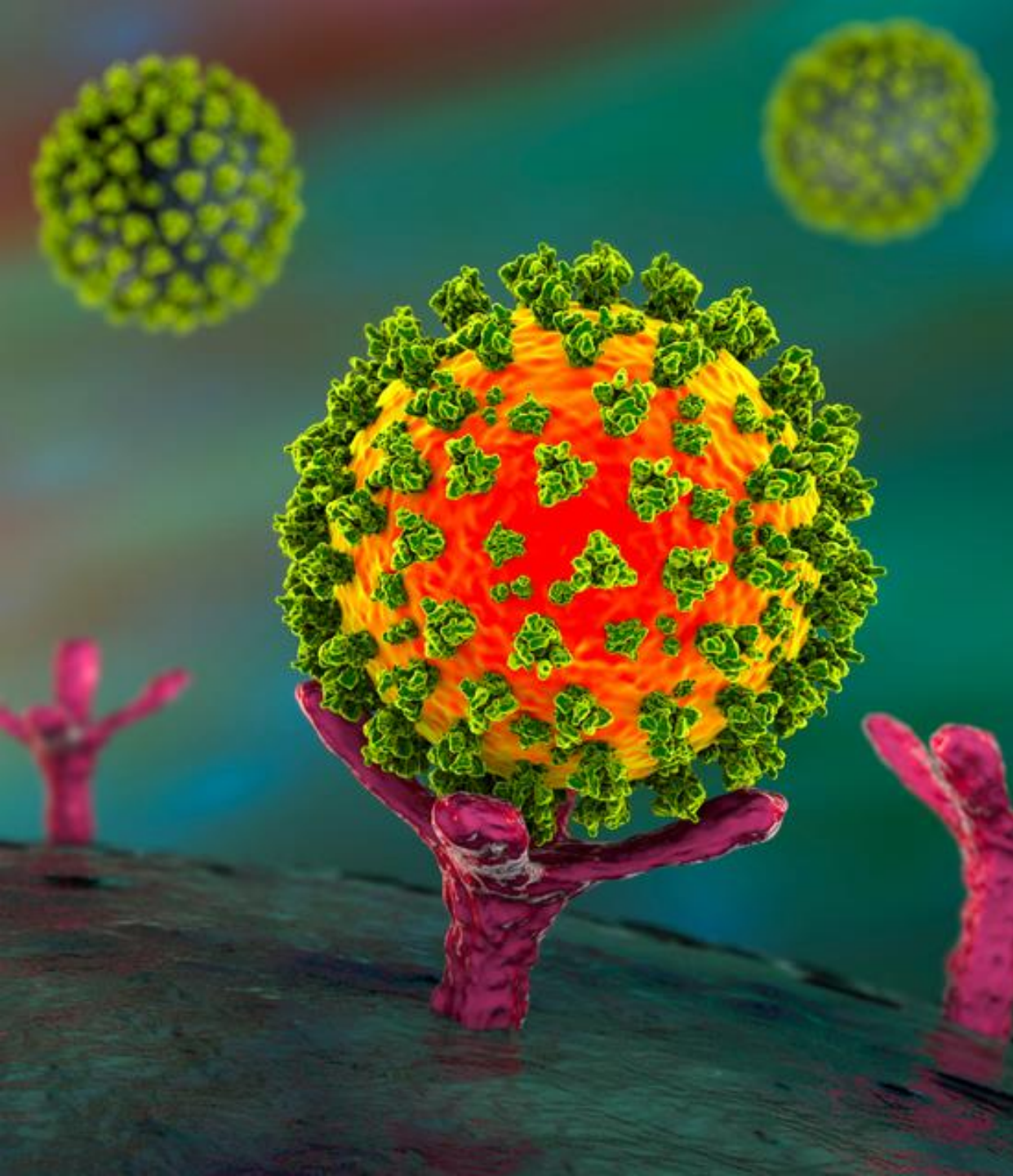
Ian Hargis

Ken Buchanan

COVID-19 Updates

Capt. Dustin Jaynes
Captain, Public Safety





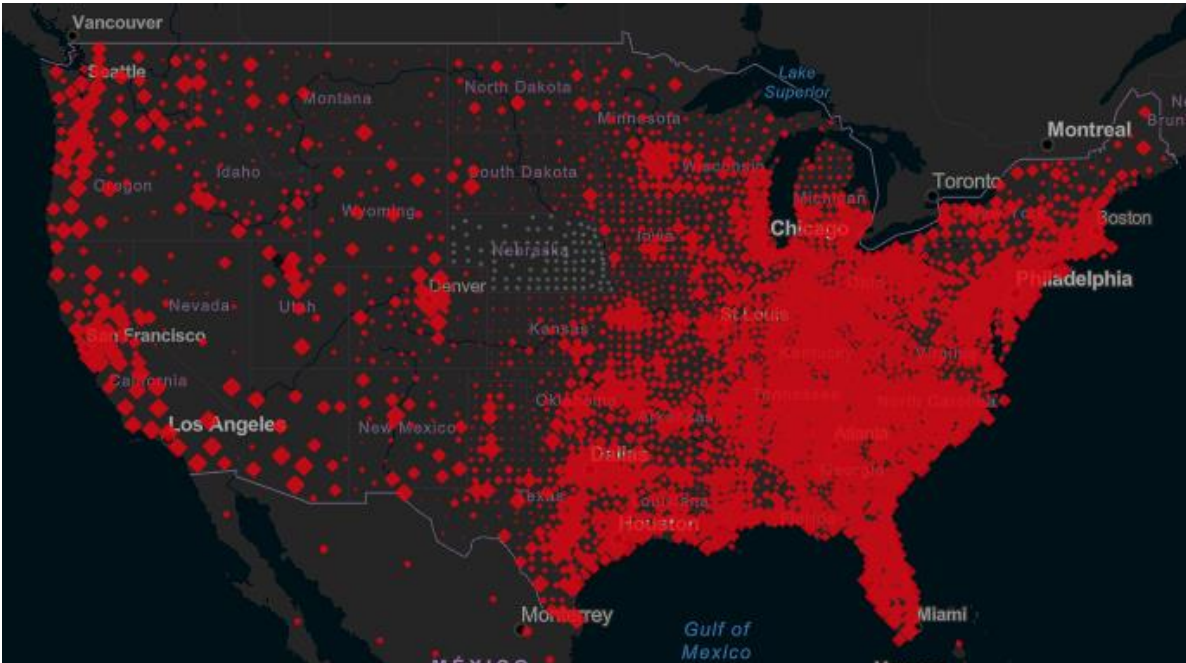
Agenda

- National, State and Local Situation

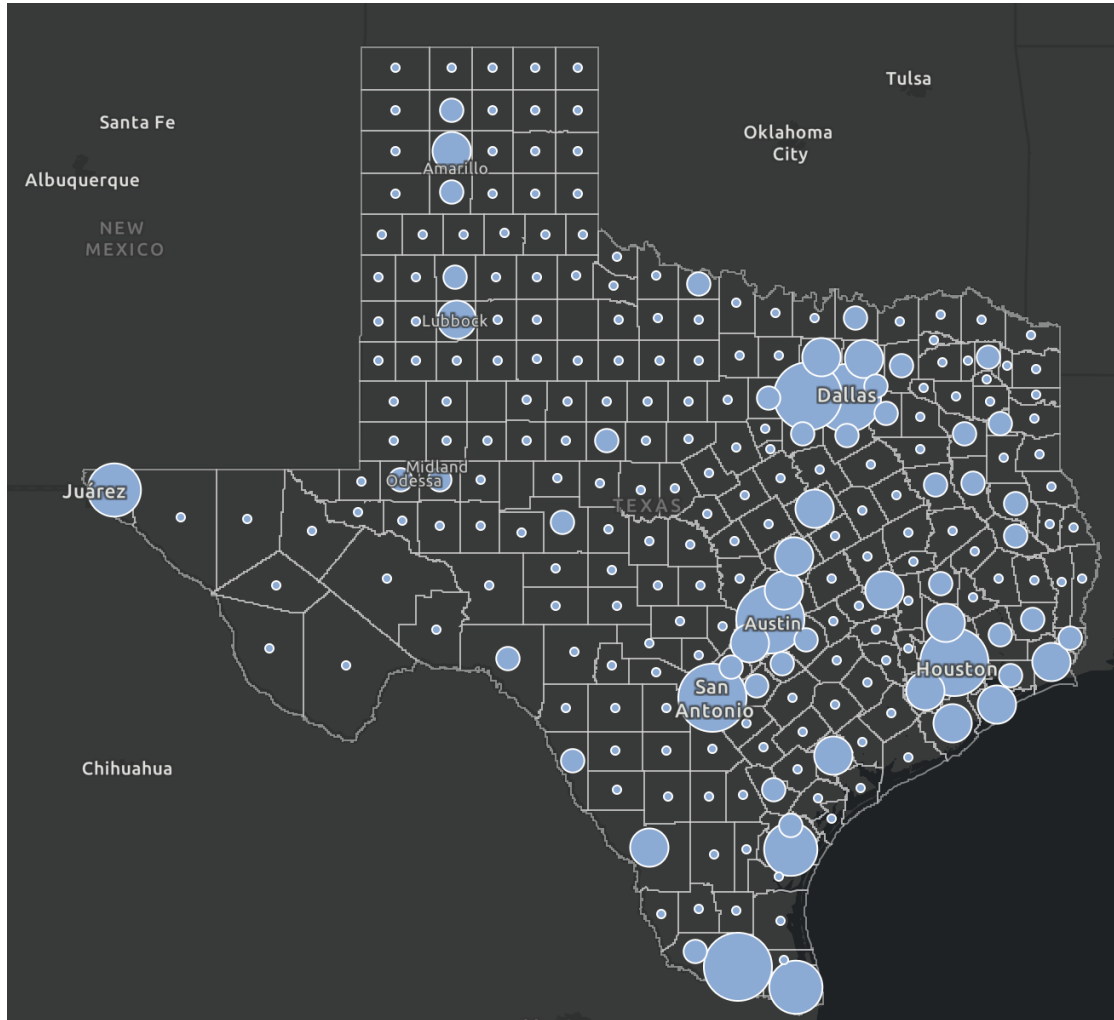
US Situation

Average Weekly Cases: ~ 330k
Average Weekly Fatalities: ~10k

99% of new cases are Omicron



*numbers current as of 03/09/22

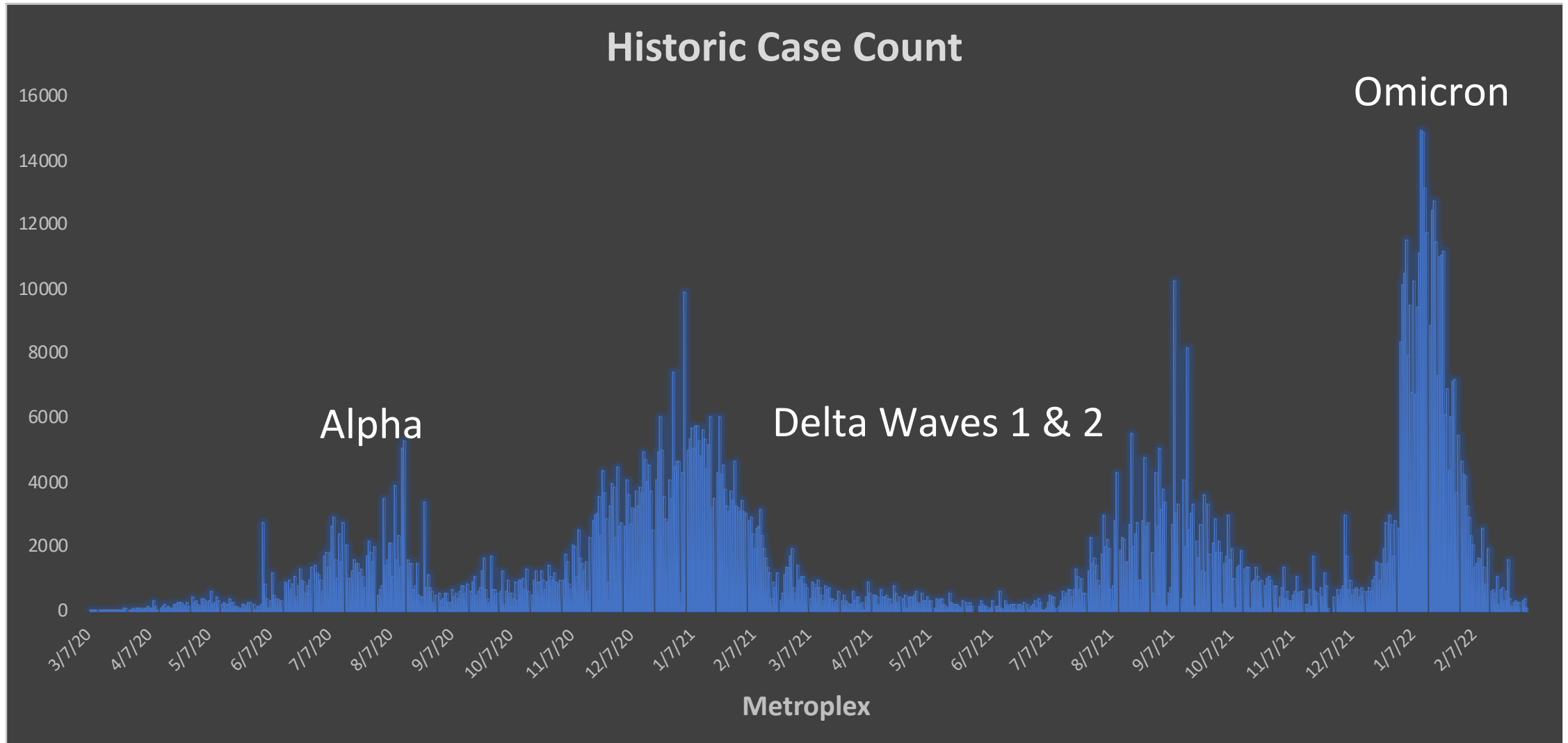


Texas Situation

*numbers current as of 03/09/22

- **Texas Population: ~29 million**
 - Approximately 26k cases a week
 - COVID hospitalizations are low
- **Metroplex Population: ~ 6.8 million**
 - Daily cases are at near all-time lows.
 - Hospitalizations remain low

Our Metroplex vs. COVID-19



Performance Update

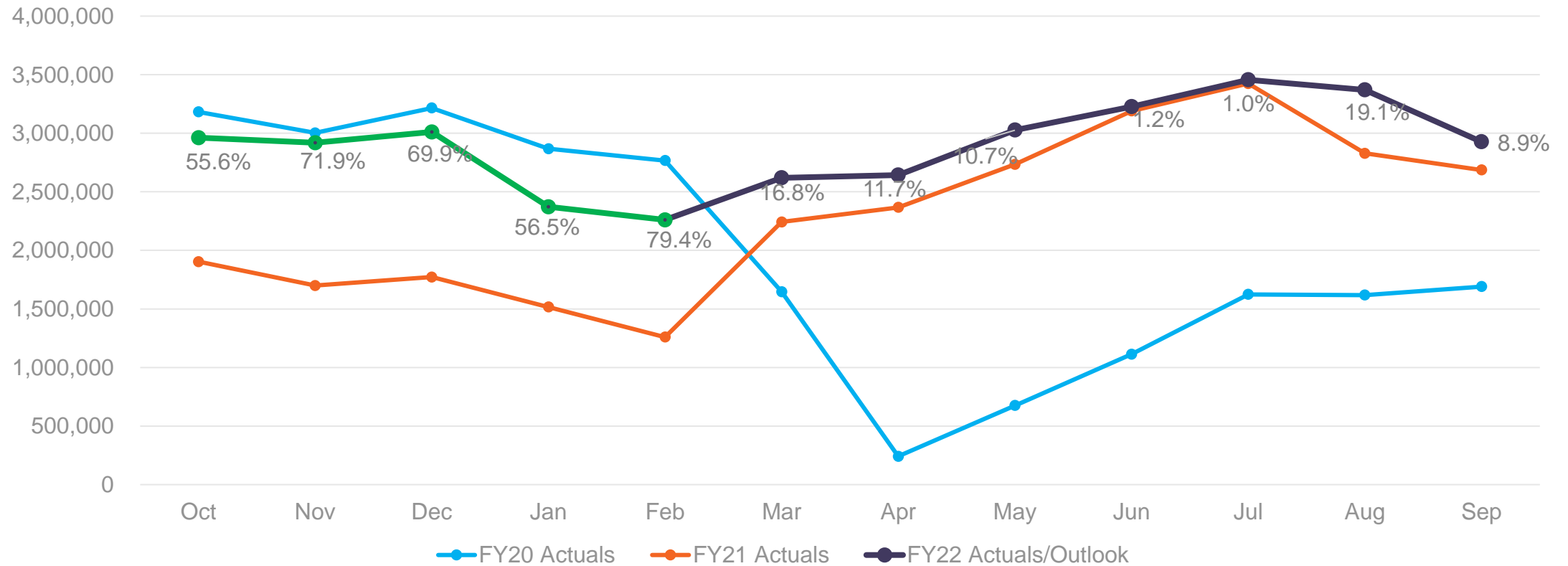
Kevin Lemmons

Assistant Vice President, Concessions



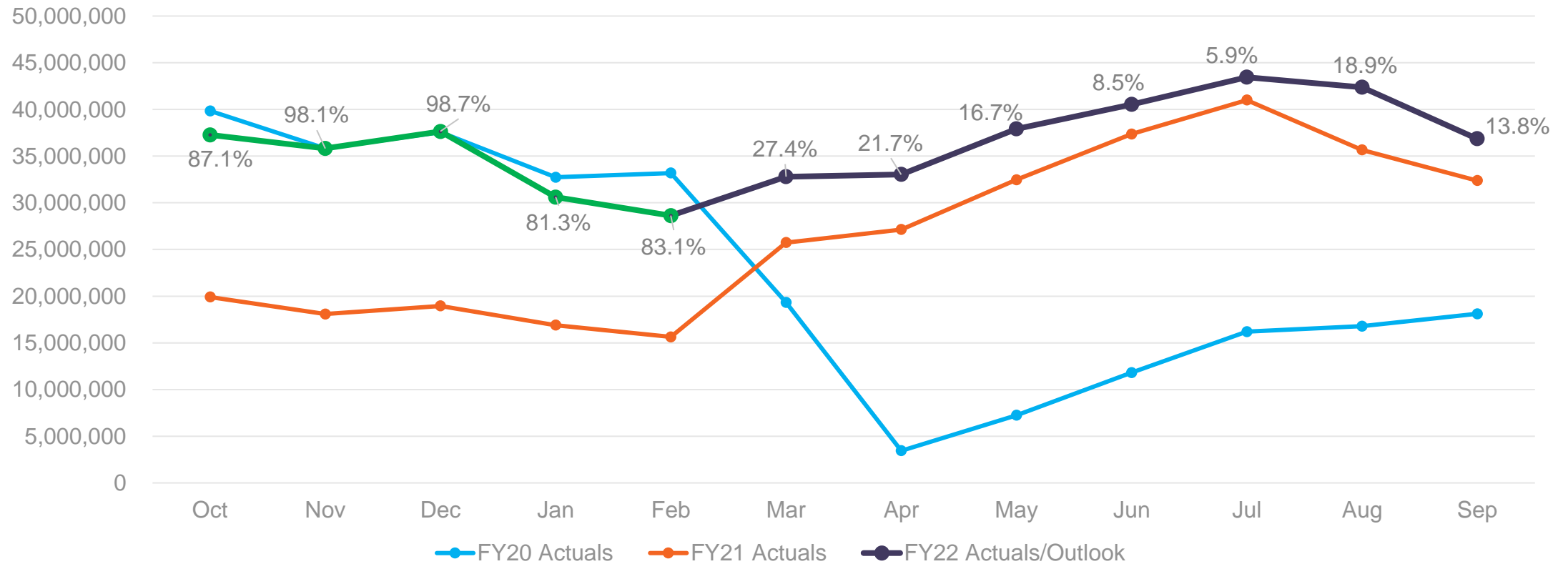
Total EPAX FYTD through February

FY22 EPAX are expected to be up 26.0% vs FY21, up 47.1% over FY20



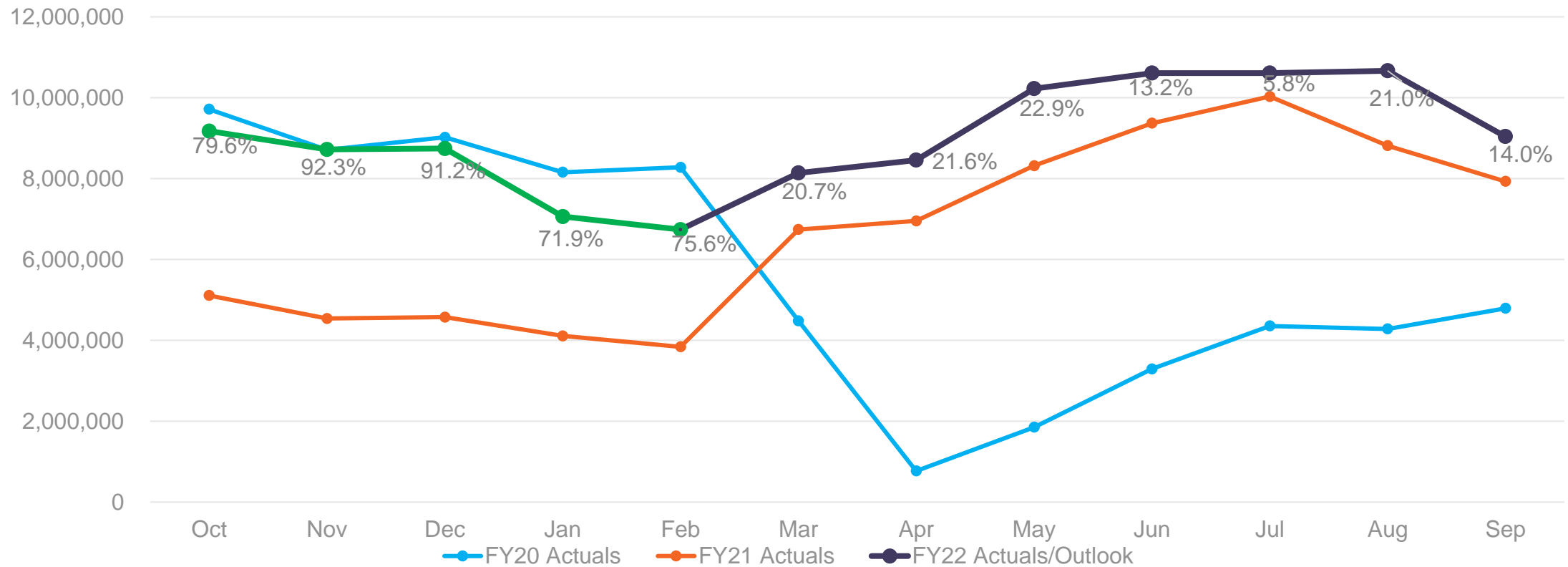
Total Gross Receipts FYTD through February

FY22 gross receipts are expected to be up 36.0% vs FY21, up 60.6% over FY20



Term A Gross Receipts FYTD through February

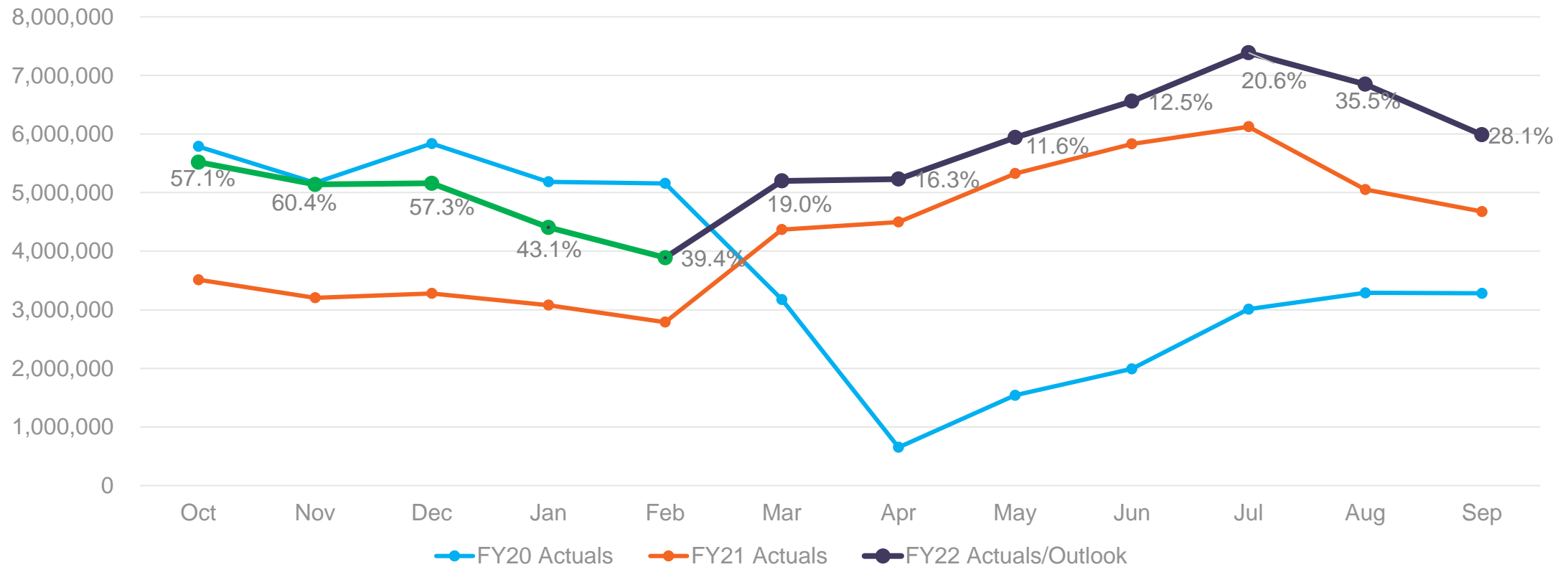
FY22 gross receipts are expected to be up 34.7% vs FY21, up 59.8% over FY20



Note: Term A has 2 closed locations

Term B Gross Receipts FYTD through February

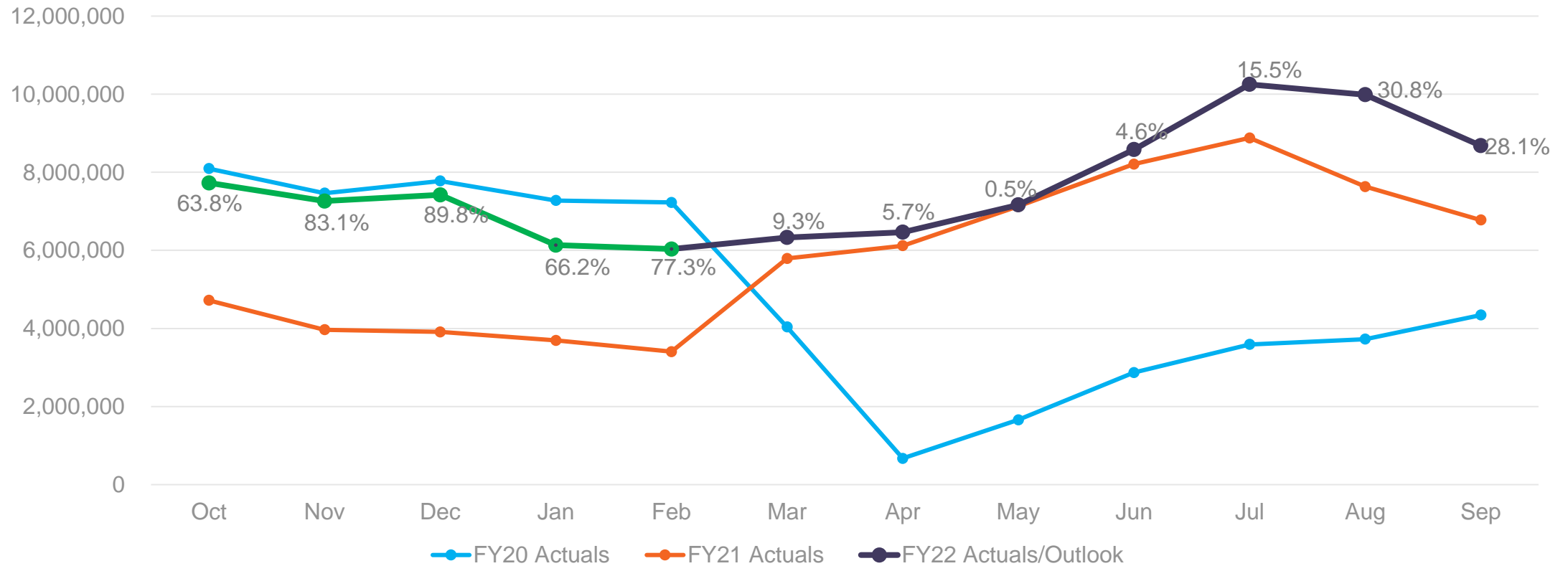
FY22 gross receipts are expected to be up 30.0% vs FY21, up 52.6% over FY20



Note: Terminal B has 1 location closed for reconcepting

Term C Gross Receipts FYTD through February

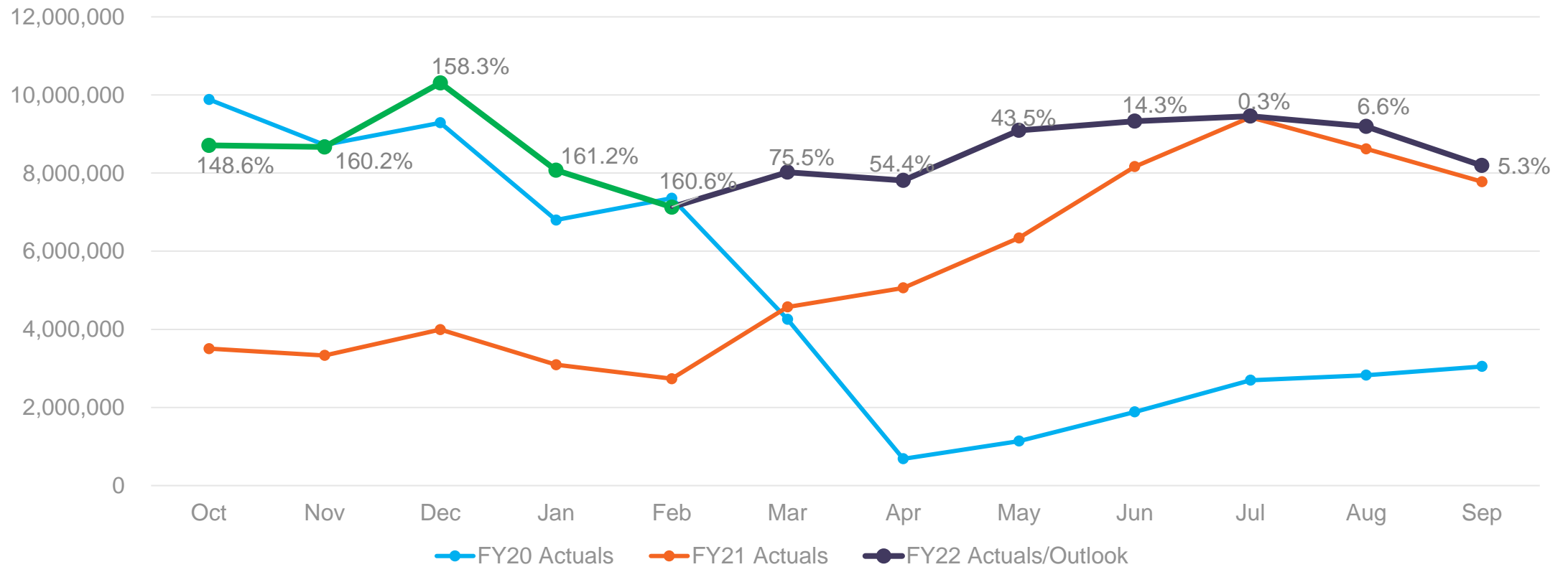
FY22 gross receipts are expected to be up 31.1% vs FY21, up 56.7% over FY20



Note: Terminal C has 2 locations closed

Term D Gross Receipts FYTD through February

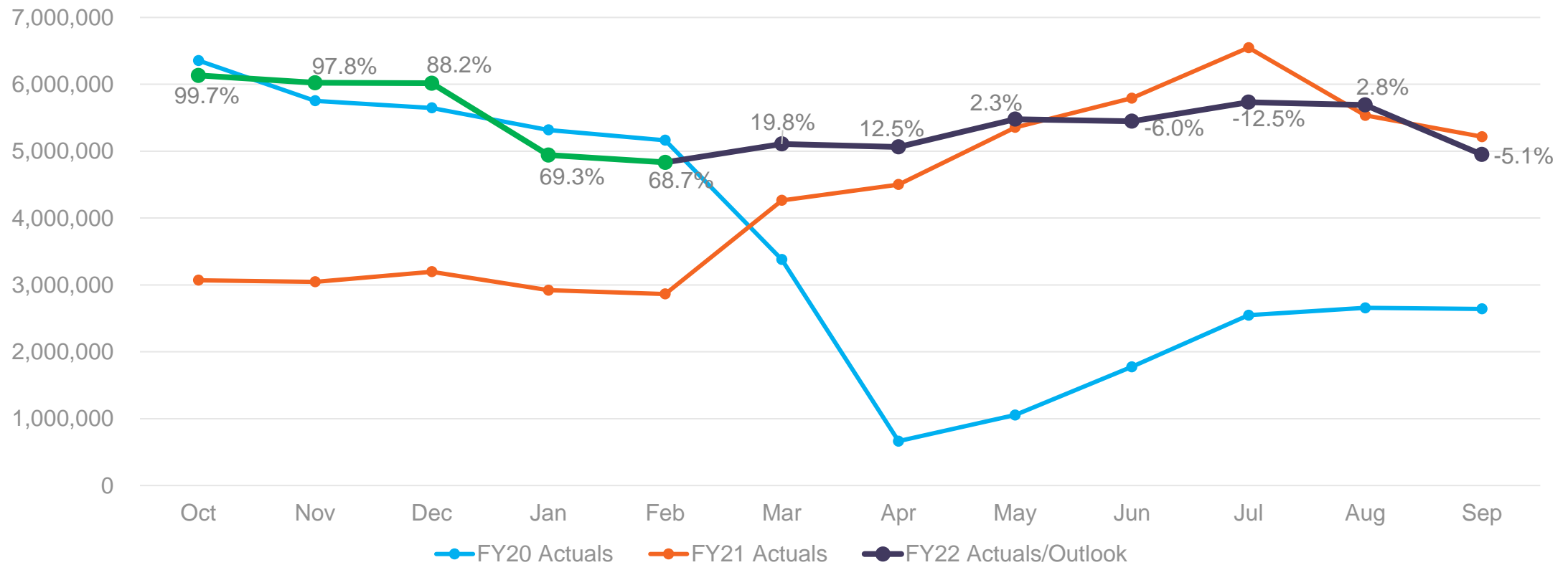
FY22 gross receipts are expected to be up 56.1% vs FY21, up 77.5% over FY20



Note: Terminal D has 3 locations closed and 4 locations closed for reconcepting

Term E Gross Receipts FYTD through February

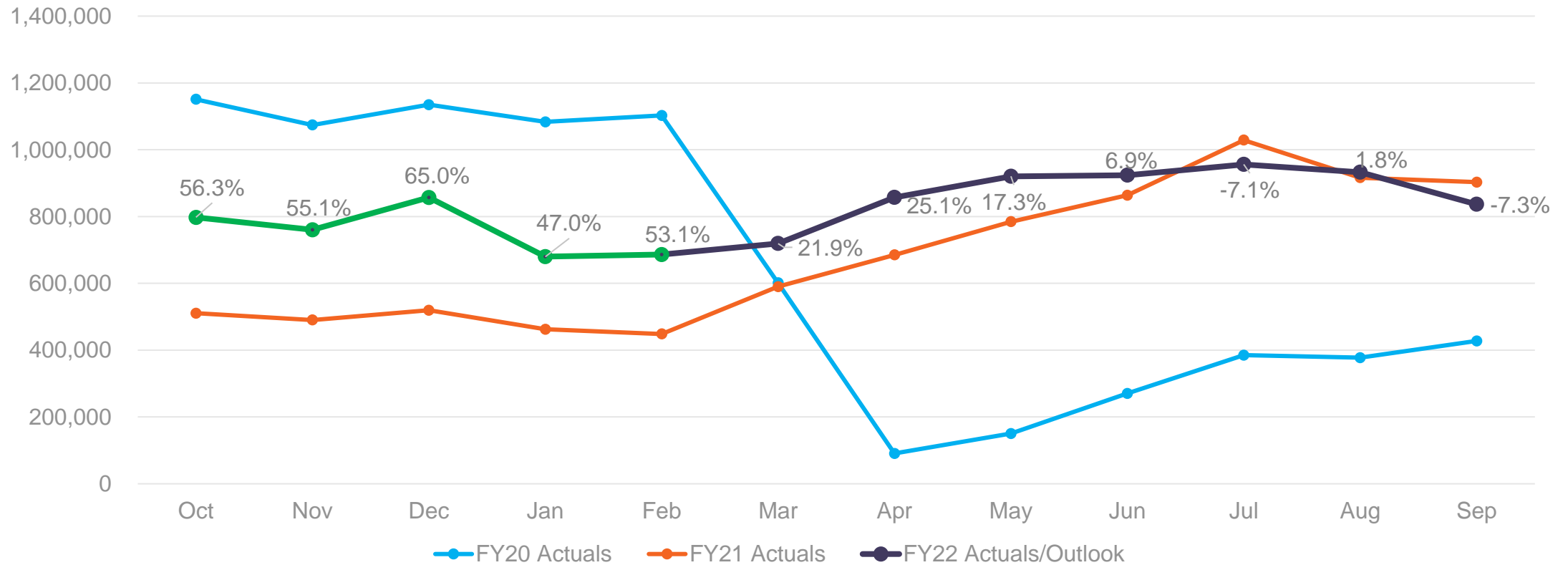
FY22 gross receipts are expected to be up 25.1% vs FY21, up 52.3% over FY20



Note: Terminal E has 2 locations closed and 1 location closed for reconcepting

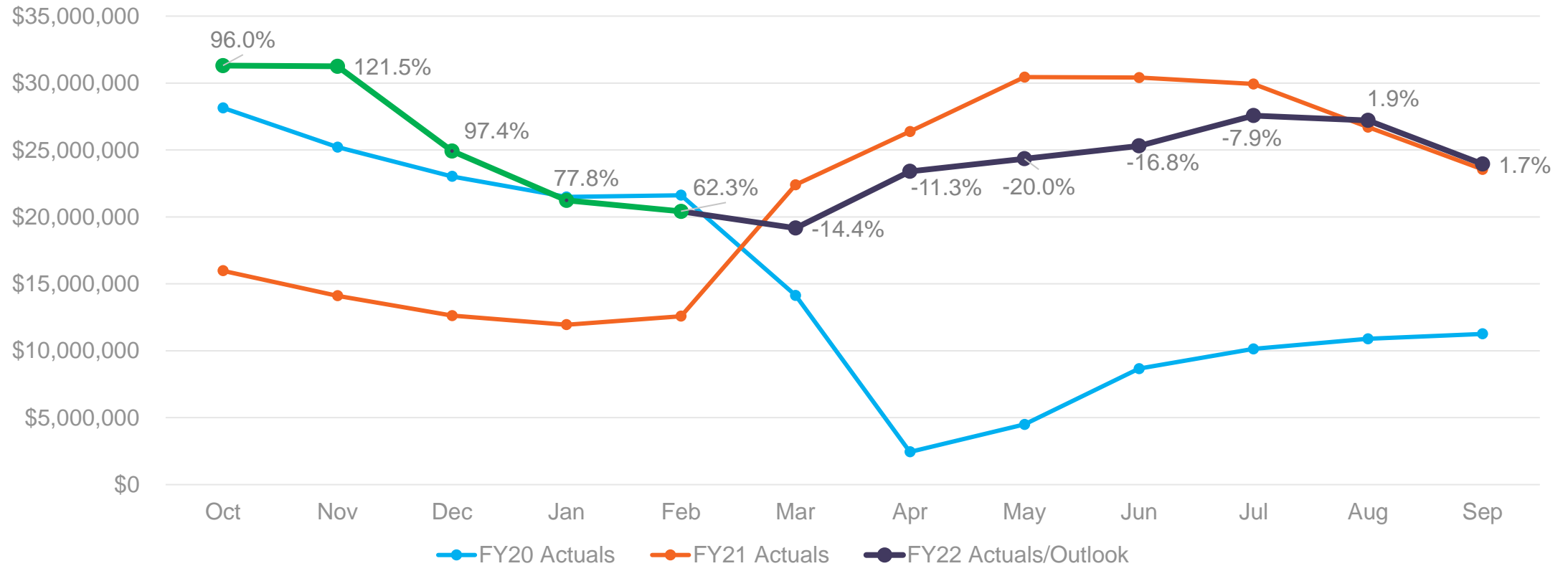
Total DPAX FYTD through February

FY22 DPAX are expected to be up 21.0% vs FY21, up 26.5% over FY20



RAC Gross Receipts FYTD through February

FY22 gross receipts are projected to be up 16.7% vs FY21, up 65.3% vs FY20



Employee Recognition

Zenola Campbell

Vice President, Concessions



Thank you to the 50+ locations that stayed open during the winter weather events!



DFW Concessions Catering Program

Thank you!

Concessionaires delivered **over**
6,500 catered meals to
DFW staff for
both winter events





Catering Program

By joining the DFW catering program, you can increase your revenue between \$25,000 and \$50,000.

Catering Guidelines

- Offer breakfast, lunch and dinner
- Provide a delivery option
- Provide a reasonable price point
- Effective Communication
- Be prompt and professional

To participate in the catering program please reach out to Luis Yadaicela
LYadaicela@dfwairport.com

Operations Update

Zenola Campbell

Vice President, Concessions





Operations Update

Staffing

- Two more hours for Spring Break
- Fully staffed for Summer

Ready for Business

- Clean up and fix up

#OneDFW

Megan Bozarth

AVP Customer Programs





Welcome to #OneDFW

Including our Concessionaire Partners
in our Customer Obsession Movement



#OneDFW is being Customer Obsessed.
and putting the customer FIRST.



How will OneDFW be implemented?

As a Training and Recognition Program for Contractors and Concessionaires

Training



Recognition



Launch a campaign video to demonstrate OneDFW.

Create a plan for recognition with Concessionaires.

Provide digital support materials to reference and share.

Promote team members who exemplify OneDFW on Airport-owned media and social media.

March #OneDFW Launch

March 11th – March 27th

- “Thank You” Promotional items distributed to all Concessionaires
- #OneDFW website premieres, providing easy access to videos and resources for #OneDFW.
- Invitation to attend recognition development as part of the concessionaire focus group



Together we are #OneDFW
and in celebration, we want to show
our appreciation for our customer
champions with this special offer.

**25% OFF YOUR
ORDER ON
dfwordernow.com**
ENJOY!

WE  OUR
CUSTOMERS



#OneDFW Resource Website

The OneDFW website will be used:

- To access videos
- Download team handouts
- Provide updates as we continue building the #OneDFW movement



A Customer First Community

Whether you work at a restaurant, shop, or an airline at DFW Airport, we all serve the same customer and have the same goal. As a community, we are dedicated to putting the needs of the customer first and protecting the trust instilled in us to deliver an exceptional customer experience.

Embracing OneDFW is to embody pride in one's work, to see value in others, respect and own the customer journey, and to always do the right thing.

Explore this page to discover resources and learn how to be recognized for exceptional service!



Recognition

Info You Didn't Know

Training Videos

#OneDFW Concessionaire Focus Group - April

- Thank you to our participants!
 - Gregg Paradies
 - Roz Mallet
 - Corliss Stone-Littles
 - Chalmer McWilliams
 - Zinat Hossain
 - Jackie Agan
 - Wendy Duval
 - Pat Murray
 - Ray Mickens
 - Gilbert Aranza
 - Raymond Kayal
 - Anthony Alessi
 - Courtney Thornton
 - Wilson Nitka

Virtual Session to Gather
Concessionaire input into
recognition program.

Let us know if you want to join!



Video

Business Diversity & Development

Small Business Enterprise Concession Program

Tamela Lee, Vice President Business Diversity and Development

March 2022





Background

Ensure Fair Access to Contract Opportunities

Allows for SBEC Direct Negotiations.

Race-Neutral measures are encouraged by federal regulations such as Small Business Enterprise Programs

FAA audit recommended SBE program for Direct Negotiations

Disparity Study Recommended all forms of contractual relationships, not just Joint Ventures (JV)

Small Business Enterprise Concession Program

Ensure Fair Access to Contract Opportunities

For all businesses and particularly for Disadvantaged, Small, Minority and Women Business Enterprises (D/S/M/WBEs)

Unique opportunity for smaller firms to independently operate as DFW concessionaires.

Increases opportunities for D/S/M/WBEs to manage and control their own locations

Creates a level playing field for D/S/M/WBEs to compete with similar sized business

Remove barriers to participation

Promote the utilization of D/S/M/WBEs

Assist the development of firms that can compete successfully in the marketplace



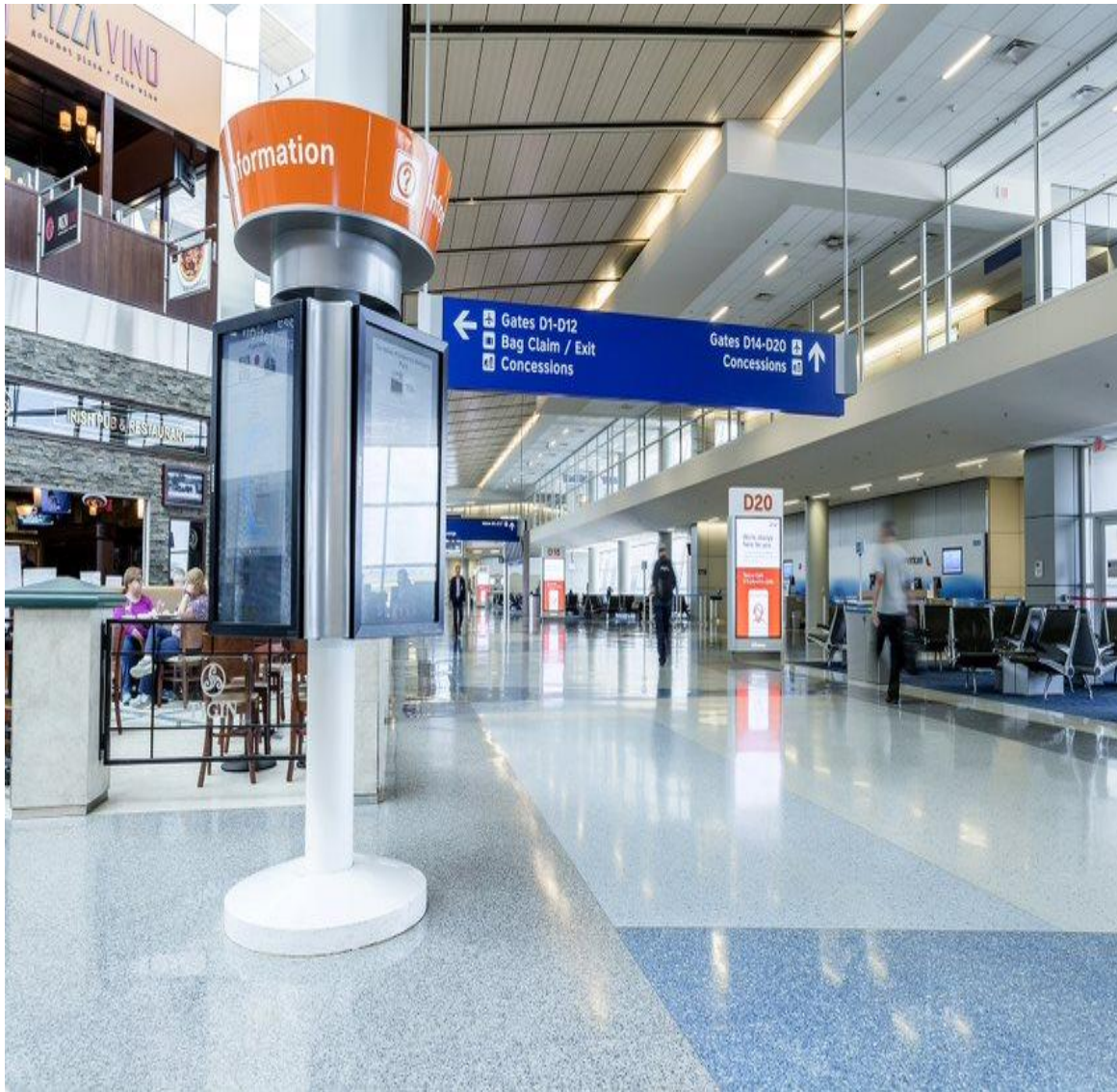
Business Diversity Program

Small Business Enterprise Concession (SBEC)

- Business size based on Small Business Administration size standards
- Personal net worth threshold same as ACDBE

Other Certification Requirements

- No Local Preference but must be certified in Texas
- Gross receipts averaged over three (3) years
- Site Visits (randomly selected)
- Certifications expire & require renewal
- ACDBEs qualify for the SBEC program subject to size standard and PNW threshold established
- Sustained business activity in the NAICS code described in the certification application for a minimum of six (6) months prior to the date of application



Program Requirements

To ensure program compliance

No concession specific goal (100% Certified SBEC)

SBEC Can JV with another SBEC but not with a non SBEC

Direct negotiations can be competitively bid among SBECs

Leases greater than seven (7) years should be evaluated with BDDD

Extensions or renewals should be evaluated with BDDD

An existing ACDBE at DFW that receives SBEC certification must be in compliance with all Airport requirements

Must be SBEC certified at time of proposal or direct negotiation. No pending certifications



Program Eligibility

To ensure program compliance

Currently Certified with the North Central Texas Regional Certification (NCTRCA) Agency

Currently not in an appeal process with NCTRCA

Do not exceed Business size based on Small Business Administration size standards

Do not exceed the Personal Net Worth threshold established by FAA ACDBE Program

Sustained business activity in the NAICS code described in the certification application for a minimum of six (6) months prior to the date of application

ACDBE certification has not been revoked

Compliant with the DFW International Airport's Business Diversity and Development Requirements, lease agreement and all other Airport requirements



Program Eligibility

To ensure program compliance

Initially no upfront application fee for certification

Application \$50.00 due with the ACDBE “Change/No Change Affidavit

The \$50.00 application fee is for each SBEC entity seeking certification

Failure to pay the \$50.00 SBEC application fee at renewal of your ACDBE certification annually will result in a:

- Revocation of your SBEC certification
- Permanently could disqualify you as an SBEC and any future SBEC opportunities will not be available to you.

SBEC Program Next Steps



NCTRCA Database Configuration to issue SBEC Certificates

DFW Letter to NCTRCA to send to ACDBEs

ACDBEs return signed letter to NCTRCA for SBEC Certification

NCTRCA issues SBEC letter or Certificate

SBEC presents letter to BDDD

Recruitment Marketing

Martin Rubinstein

Assistant Vice President, Communications & Marketing



“Selfie” style ad campaign with actual quotes regarding why they like working at DFW, from the employee featured.



**"YOU MEET
SO MANY DIFFERENT
TYPES OF PEOPLE"**
–John, Hugo Boss



**"IT'S A SUPER SAFE PLACE
TO WORK"**
–Angela, Shake Shack

Digital Display Ads

Mobile Fuse Display Ads – 320x50, 300x250

Linking to: dfwairport.com/business/careers/concessionsjobs/

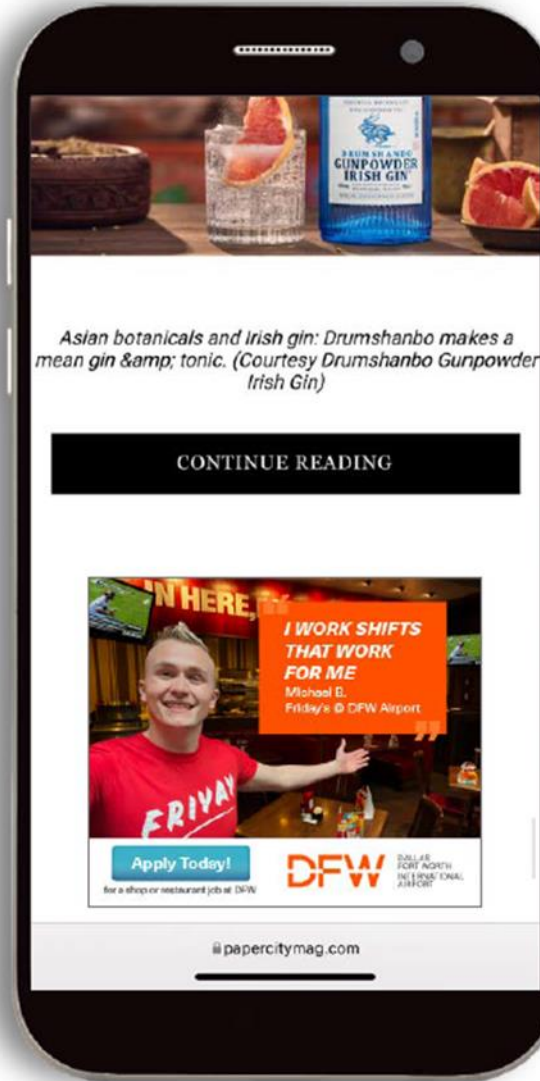


I CAN BE MYSELF HERE
Brendan K.
MAC @DFW Airport

Apply Today!
for a shop or restaurant job at DFW

DFW DALLAS FORT WORTH INTERNATIONAL AIRPORT

AIRPORT RESTAURANTS AND SHOPS ARE HIRING **Apply Today!** **DFW**



Asian botanicals and Irish gin: Drumshanbo makes a mean gin & tonic. (Courtesy Drumshanbo Gunpowder Irish Gin)

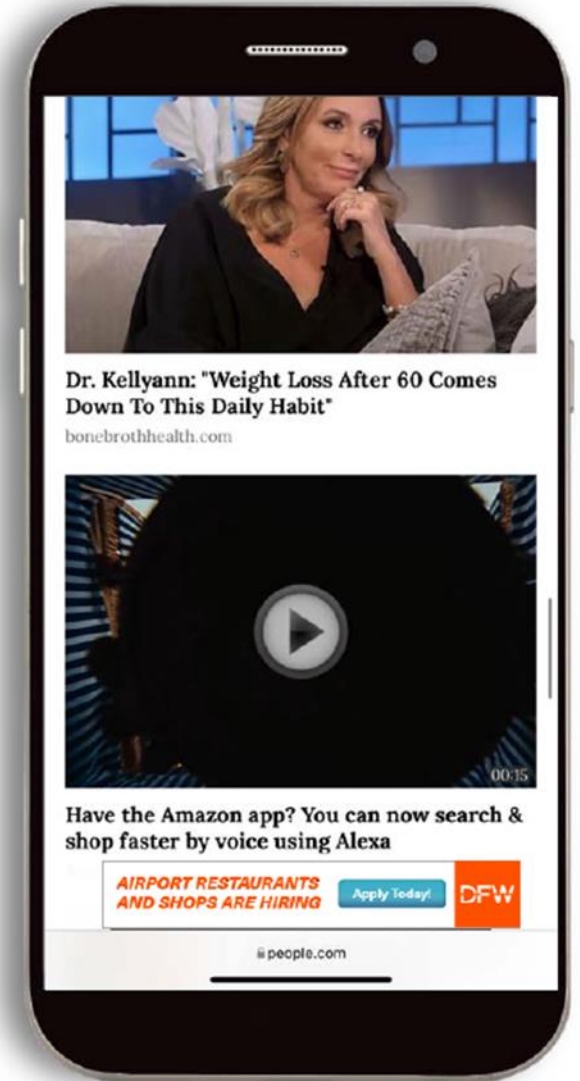
CONTINUE READING

I WORK SHIFTS THAT WORK FOR ME
Michael B.
Friday's @ DFW Airport

Apply Today!
for a shop or restaurant job at DFW

DFW DALLAS FORT WORTH INTERNATIONAL AIRPORT

[@papercitymag.com](http://papercitymag.com)



Dr. Kellyann: "Weight Loss After 60 Comes Down To This Daily Habit"
bonebrothhealth.com

Have the Amazon app? You can now search & shop faster by voice using Alexa

AIRPORT RESTAURANTS AND SHOPS ARE HIRING **Apply Today!** **DFW**

[@people.com](http://people.com)

Digital Display Ads

Linking to: dfwairport.com/business/careers/concessionsjobs/



WE ARE A TEAM HERE
Bonifacio V.
Friday's @ DFW Airport

Apply Today!
for a shop or restaurant job at DFW

DFW DALLAS FORT WORTH INTERNATIONAL AIRPORT



I CAN BE MYSELF HERE
Brendan K.
MAC @DFW Airport

Apply Today!
for a shop or restaurant job at DFW

DFW DALLAS FORT WORTH INTERNATIONAL AIRPORT



FEELS INTERNATIONAL BUT IT'S LOCAL
Rumana H.
Capital One Lounge @ DFW Airport

Apply Today!
for a shop or restaurant job at DFW

DFW DALLAS FORT WORTH INTERNATIONAL AIRPORT



WE'RE AT THE CENTER OF EVERYTHING
Angela B.
National @ DFW Airport

Apply Today!
for a shop or restaurant job at DFW

DFW DALLAS FORT WORTH INTERNATIONAL AIRPORT



I WORK SHIFTS THAT WORK FOR ME
Michael B.
Friday's @ DFW Airport

Apply Today!
for a shop or restaurant job at DFW

DFW DALLAS FORT WORTH INTERNATIONAL AIRPORT



I FEEL SAFER WHERE I WORK
Emily H.
Chick-Fil-A @ DFW Airport

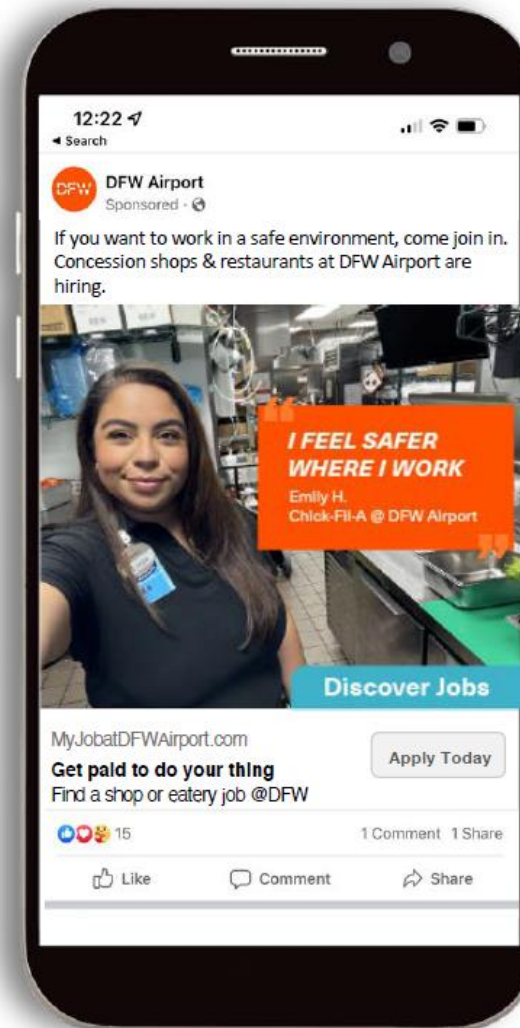
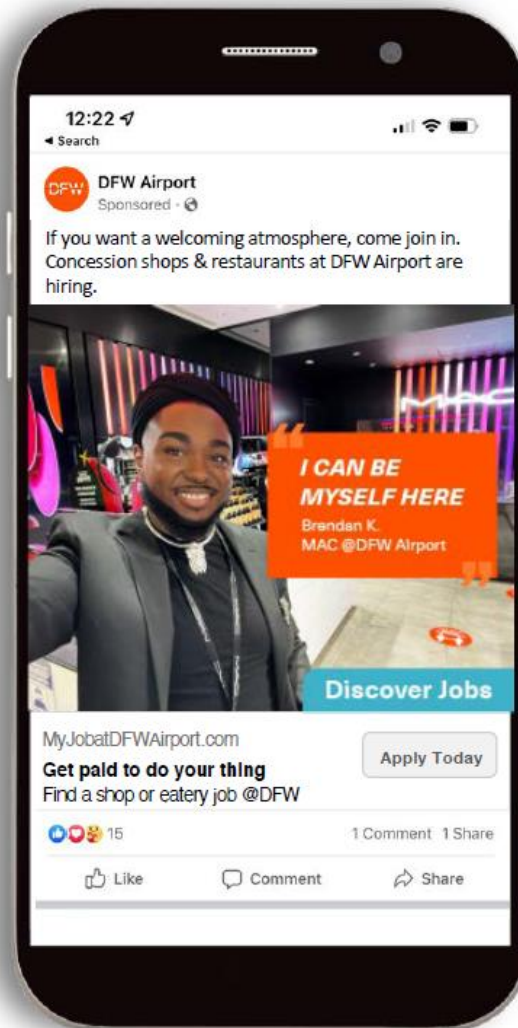
Apply Today!
for a shop or restaurant job at DFW

DFW DALLAS FORT WORTH INTERNATIONAL AIRPORT

Paid Social

300x250

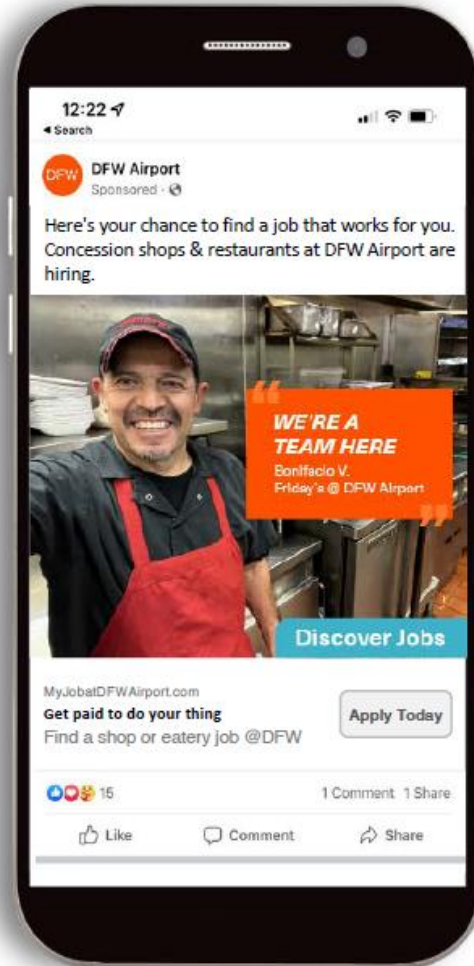
Linking to : dfwairport.com/business/careers/concessionsjobs/



Paid Social – Carousel

300x250

Linking to: dfwairport.com/business/careers/concessionsjobs



DART/TRE Transit Posters

QR code and vanity URL linking to: dfwairport.com/business/careers/concessionsjobs/



DFW DALLAS FORT WORTH INTERNATIONAL AIRPORT

FEELS INTERNATIONAL BUT IT'S LOCAL
Barbara, Capital One Lounge @ DFW Airport

Apply for a shop or restaurant job at DFW today!

Scan code or visit MyJobAtDFWAirport.com to apply



DFW DALLAS FORT WORTH INTERNATIONAL AIRPORT

WE'RE AT THE CENTER OF EVERYTHING
Angela B. National Car Rental @ DFW Airport

Apply for a shop or restaurant job at DFW today!

Scan code or visit MyJobAtDFWAirport.com to apply



DFW DALLAS FORT WORTH INTERNATIONAL AIRPORT

IT FEELS LIKE A FAMILY AT DFW
Loudelle, Texas Marketplaces @ DFW Airport

Apply for a shop or restaurant job at DFW today!

Scan code or visit MyJobAtDFWAirport.com to apply



DART/TRE Transit Posters (Interior)

QR code and vanity URL linking to: dfwairport.com/business/careers/concessionsjobs/

DFW DALLAS FORT WORTH INTERNATIONAL AIRPORT

WE'RE AT THE CENTER OF EVERYTHING

Angela B. National Car Rental @ DFW Airport

Apply for a shop or restaurant job at DFW today!

Scan or visit [MyJobAtDFWAirport.com](https://dfwairport.com/business/careers/concessionsjobs/) to apply

DFW DALLAS FORT WORTH INTERNATIONAL AIRPORT

WE ARE A TEAM HERE

Bonifacio V. Friday's @ DFW Airport

Apply for a shop or restaurant job at DFW today!

Scan or visit [MyJobAtDFWAirport.com](https://dfwairport.com/business/careers/concessionsjobs/) to apply

DFW DALLAS FORT WORTH INTERNATIONAL AIRPORT

I FEEL SAFER WHERE I WORK

Emily H. Chick-FH A @ DFW Airport

Apply for a shop or restaurant job at DFW today!

Scan or visit [MyJobAtDFWAirport.com](https://dfwairport.com/business/careers/concessionsjobs/) to apply

DFW DALLAS FORT WORTH INTERNATIONAL AIRPORT

I WORK SHIFTS THAT WORK FOR ME

Michael B. Friday's @ DFW Airport

Apply for a shop or restaurant job at DFW today!

Scan or visit [MyJobAtDFWAirport.com](https://dfwairport.com/business/careers/concessionsjobs/) to apply

DFW DALLAS FORT WORTH INTERNATIONAL AIRPORT

I CAN BE MYSELF HERE

Brandon, MAE @ DFW Airport

Apply for a shop or restaurant job at DFW today!

Scan or visit [MyJobAtDFWAirport.com](https://dfwairport.com/business/careers/concessionsjobs/) to apply

2022 Campaign

Target audience

People looking for a fun, exciting, safe place to work with a sense of community that enjoy interacting with global customers.

Distribution channels

- Paid digital - target cell phone owners that are looking for jobs, or already working in food service
- Paid social – targeted by geographic location or address from the DFW Metroplex
- DART/TRE transit – targeting those who utilize the Orange and Green lines and TRE that directly connect to DFW Airport

Next steps

- ✓ Finalize creative by March 10
- ✓ Launch by March 21

Timing

- March 2022 – May 2022
- Refresh of talent in May-July 2022 integrating college and summer workers

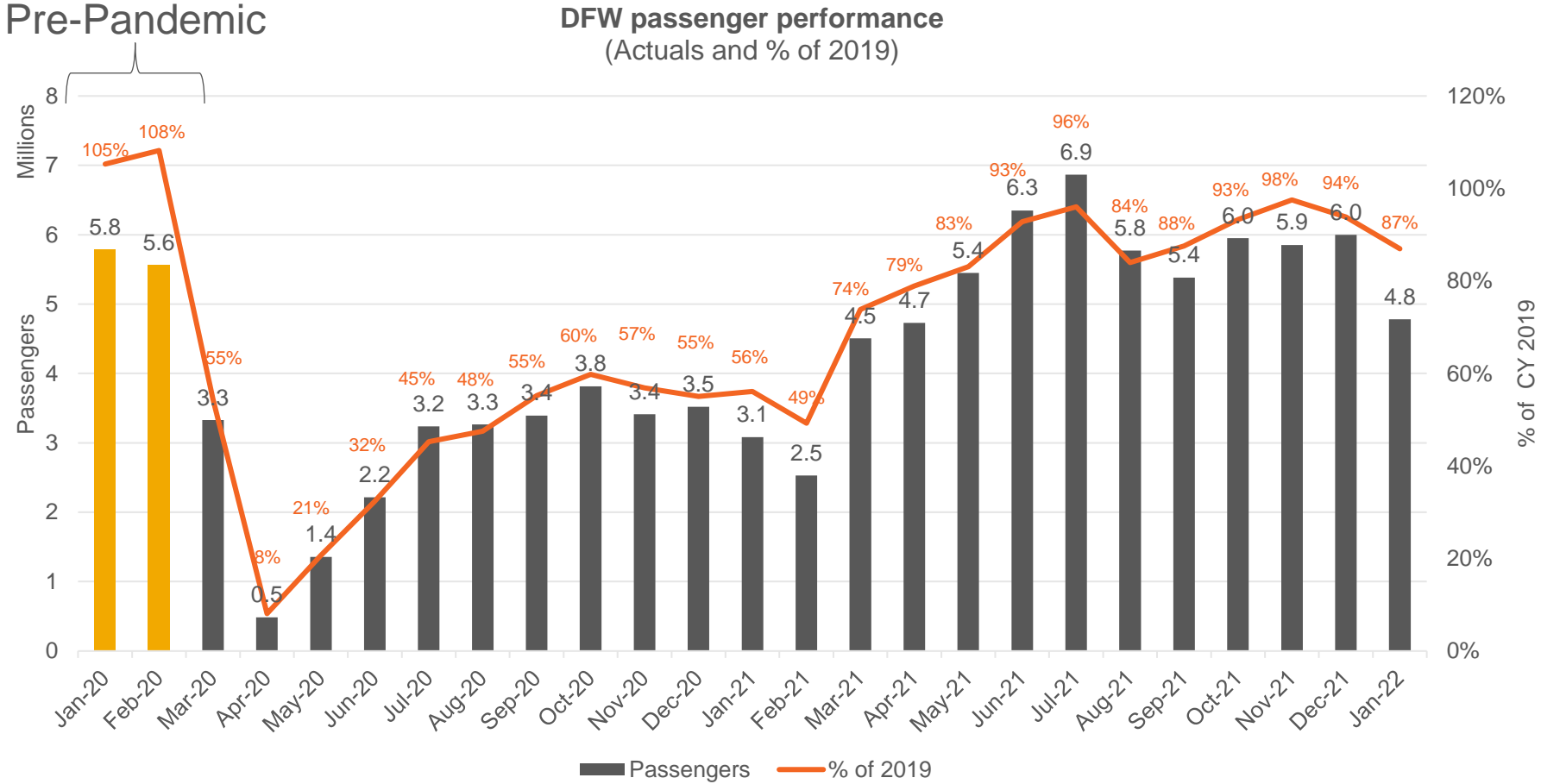
Air Services Update

Ian Hargis

Senior Aviation Analytics Manager



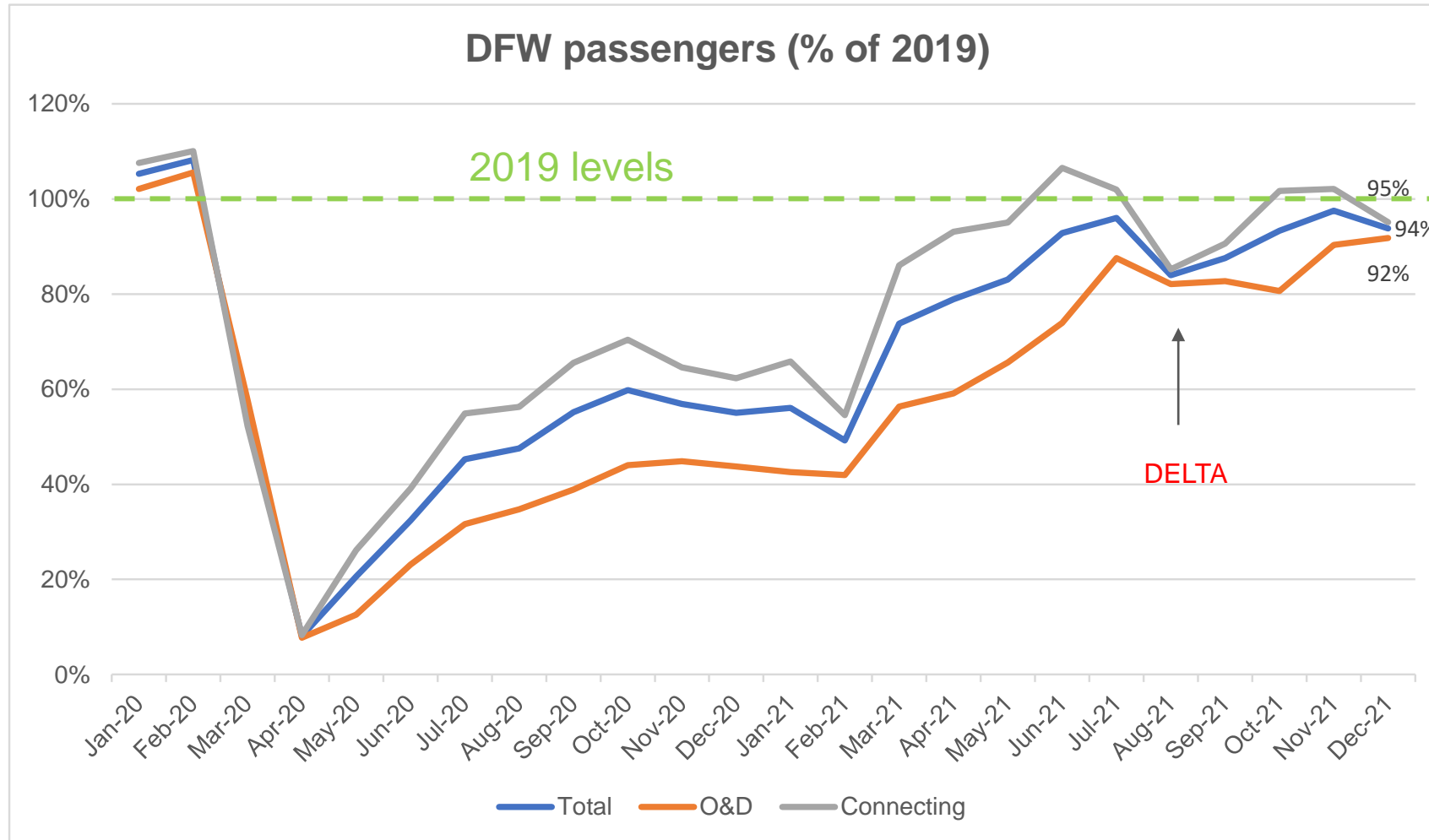
DFW's passenger traffic has recovered strongly since last spring



Source: Internal Statistics
 Note: 2019 levels refer to CY 2019



Connecting traffic has driven the recovery but local traffic recovery has accelerated as well

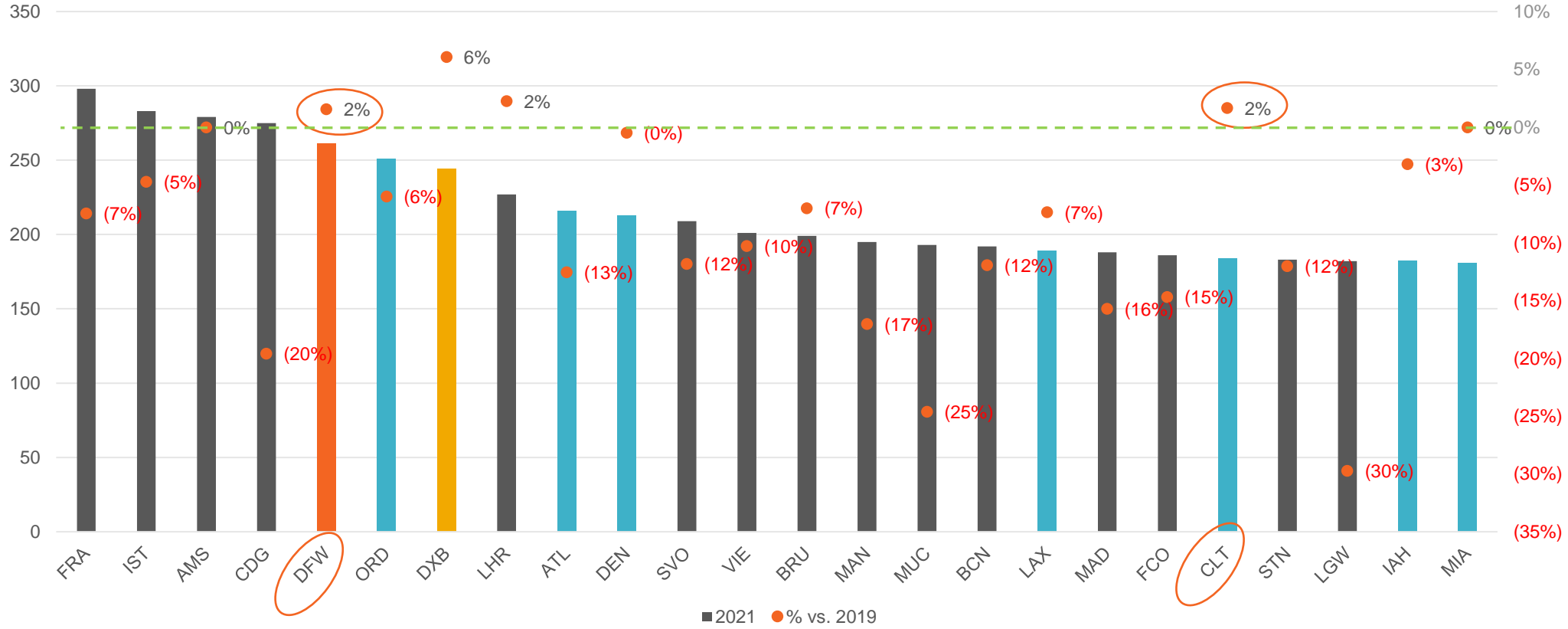


Destinations prior to and during the pandemic

	Pre-Pandemic	Last Presentation July 2021	At 12/31/21	Scheduled/Intended to Start or Return	Not Yet Scheduled to Return
Domestic	191	194	196	1	8
International	66	64	65	8	6
Total	257	258	261	9	14

DFW and CLT are the only U.S. airports in the top 25 to have gained more destinations since the pandemic

DFW ranked 5th in the world

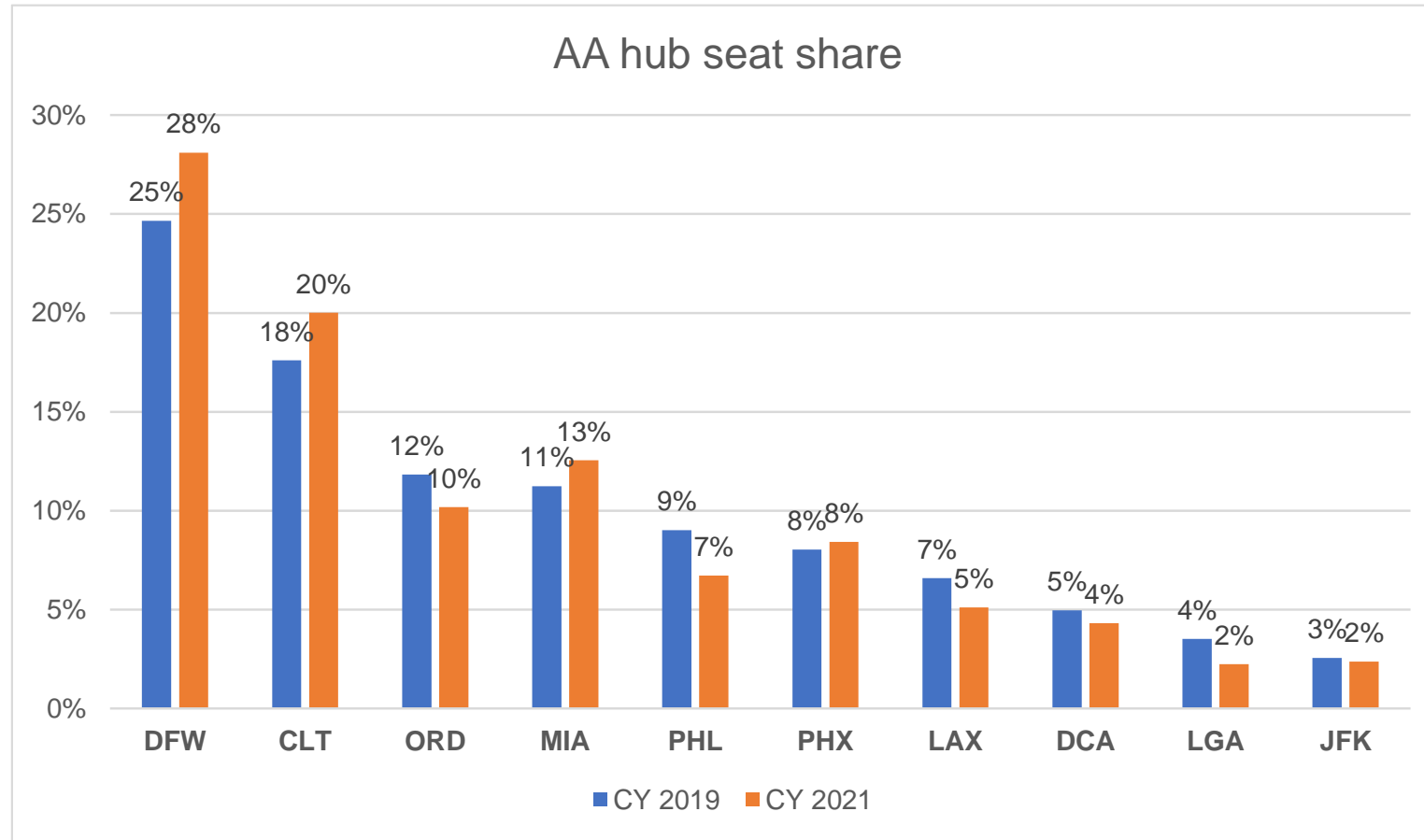


= Europe
 = DFW
 = U.S.
 = Middle East

Source: diio.mi Schedules YE Dec 2021 vs. Dec 2019 as of January 19, 2022



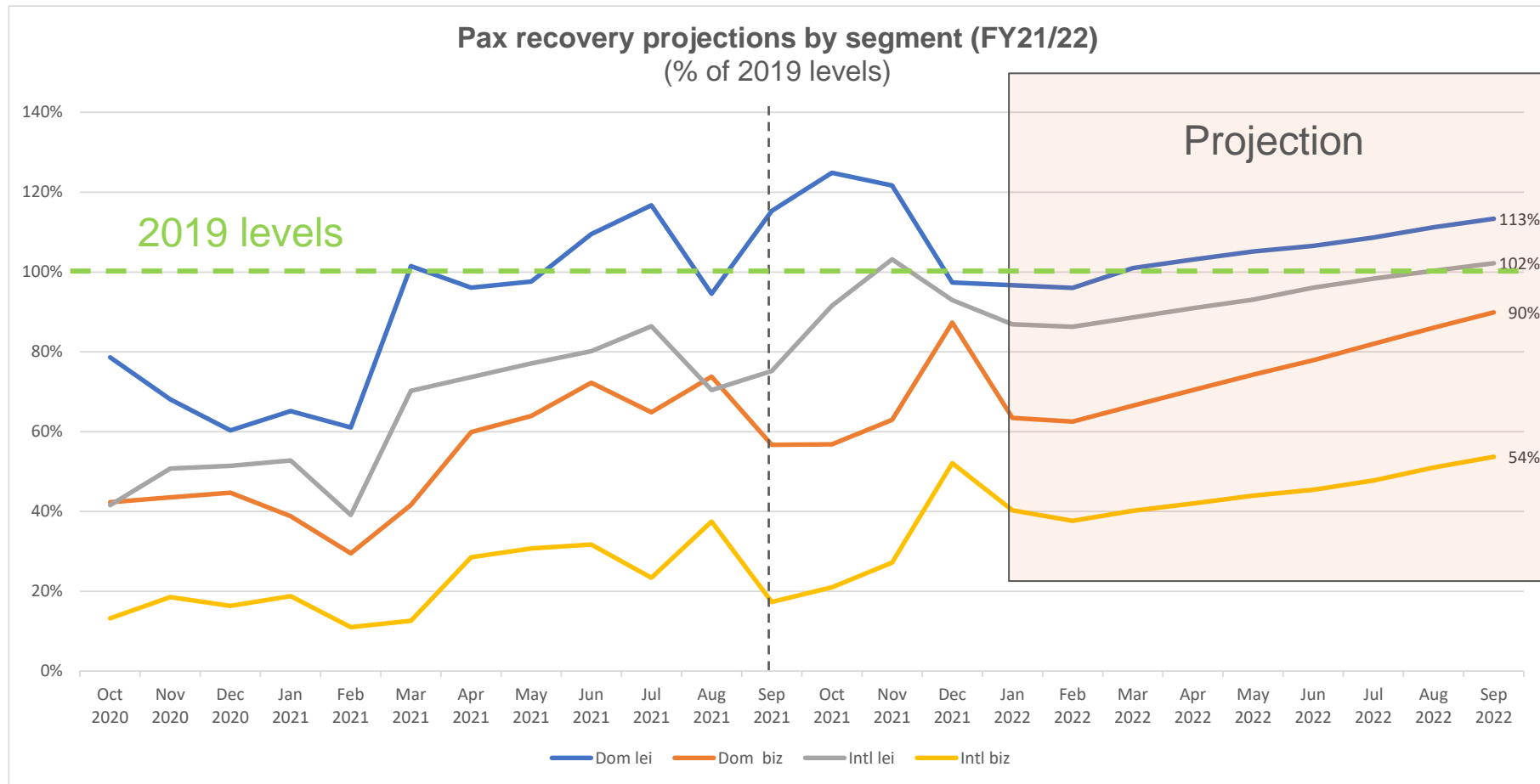
DFW has become a bigger part of AA's network during the pandemic



Source: Diio.mi Schedules as of February 14, 2022



Leisure travel has been and continues to be the main driver of the recovery

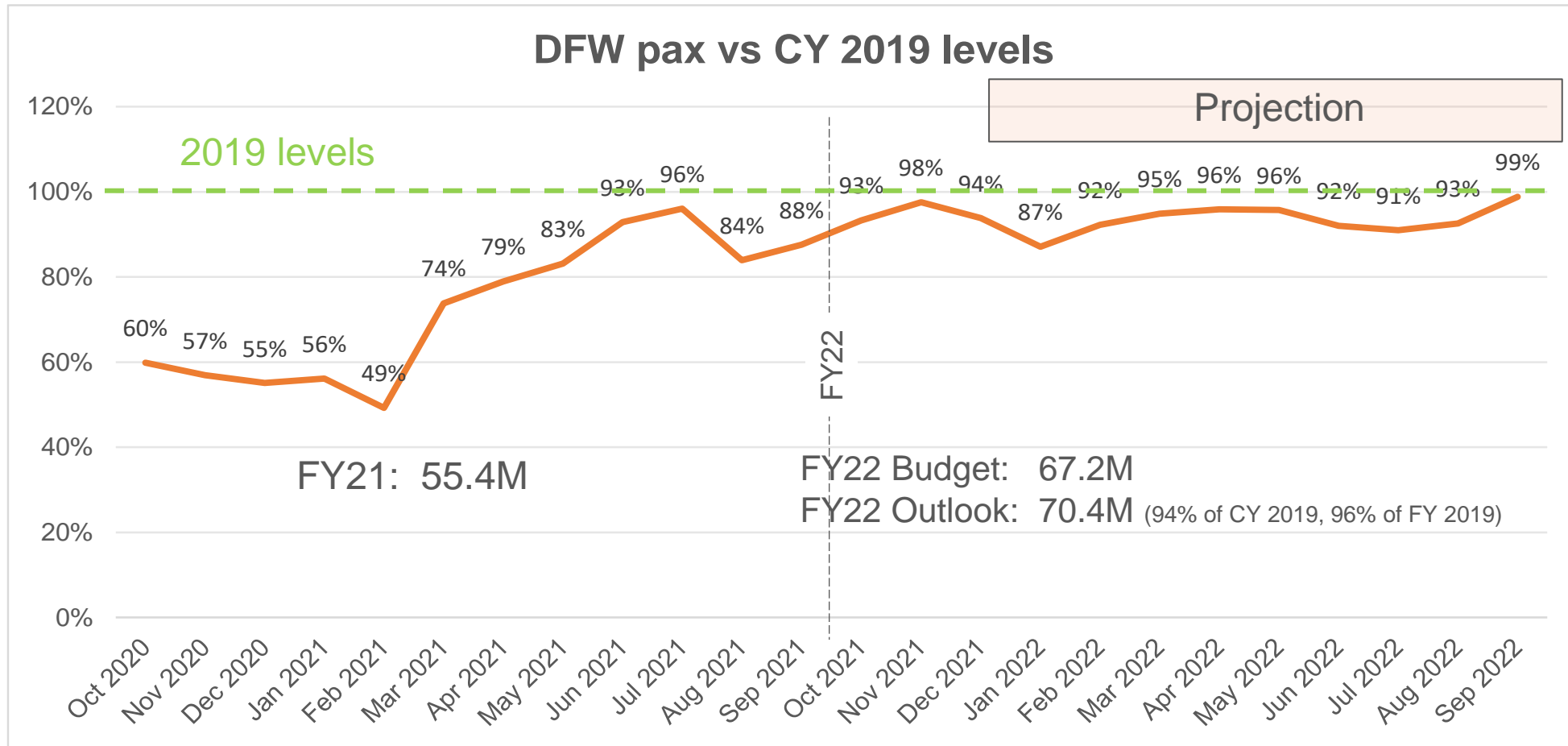


Source: Internal statistics, customer intercept surveys

Note: Projections as of January 31, 2022; 2019 levels refer to CY 2019



FY22 total passengers are projected to approach 94% of 2019 levels



Source: Internal statistics; projections as of January 31, 2022

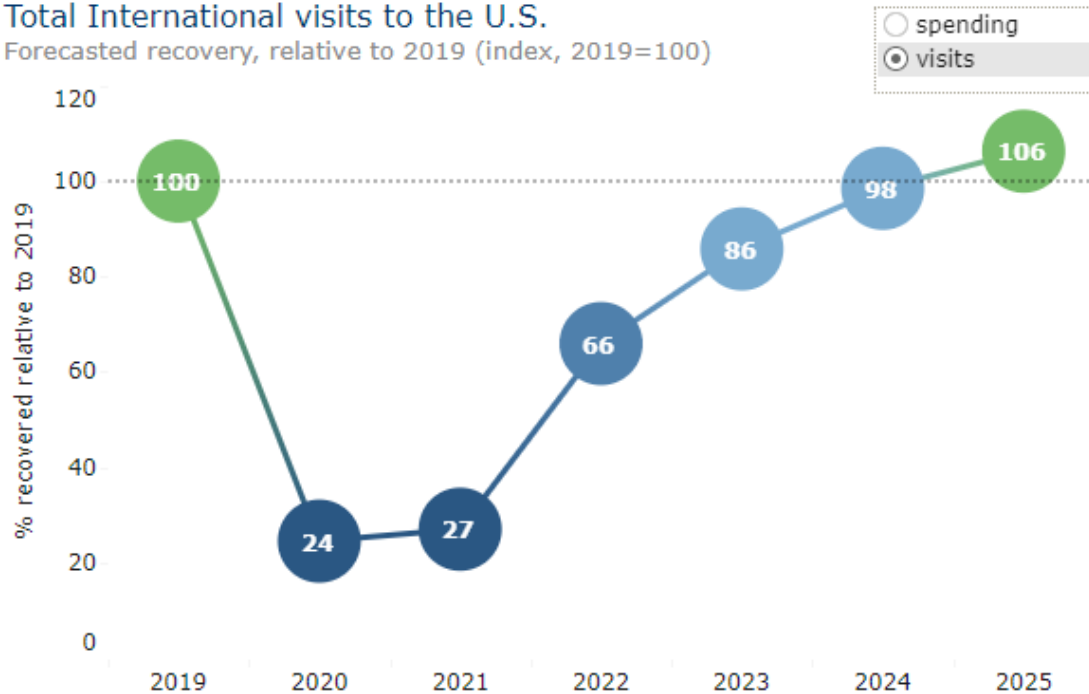
Note: 2019 levels refer to CY 2019



International visits to the US are expected to fully recover by 2025

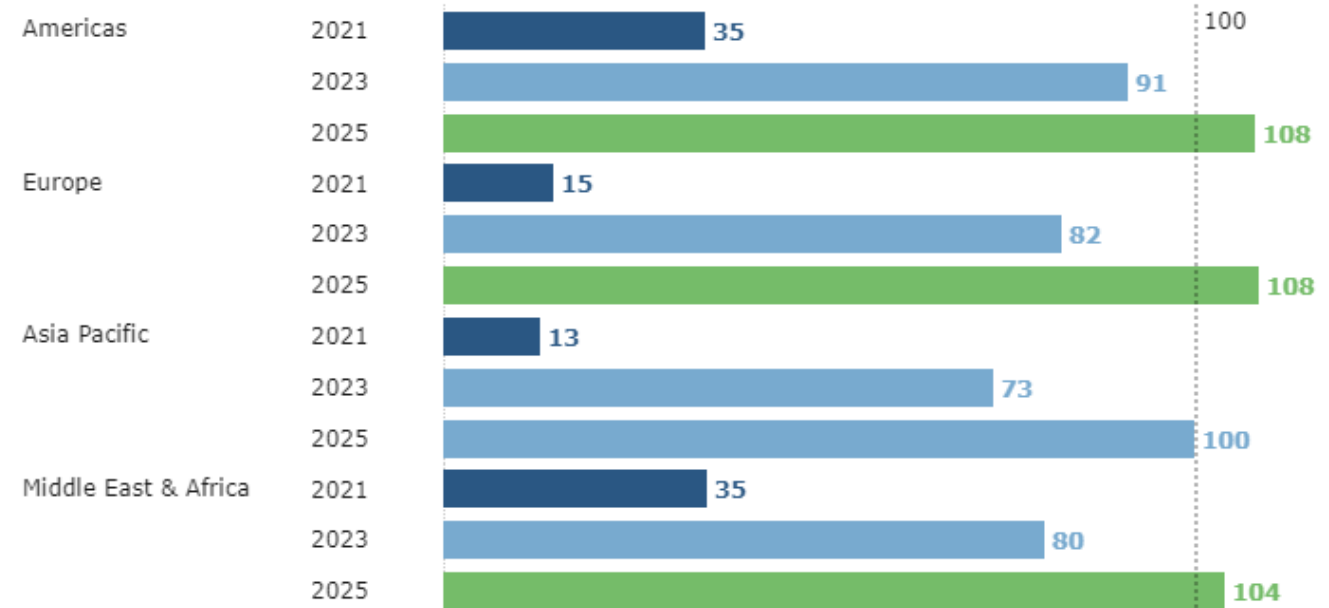
Total International visits to the U.S.

Forecasted recovery, relative to 2019 (index, 2019=100)



International visits to the U.S. by World Region

Forecasted recovery for top-regions, relative to 2019 (index, 2019=100)





Encouraging signs for European travel in 2022 as restrictions ease

“Within 24 hours of the initial White House announcement, American saw a 66% increase in bookings to the UK, and a 40% increase in bookings to Europe.” - *Robert Isom, AA President*

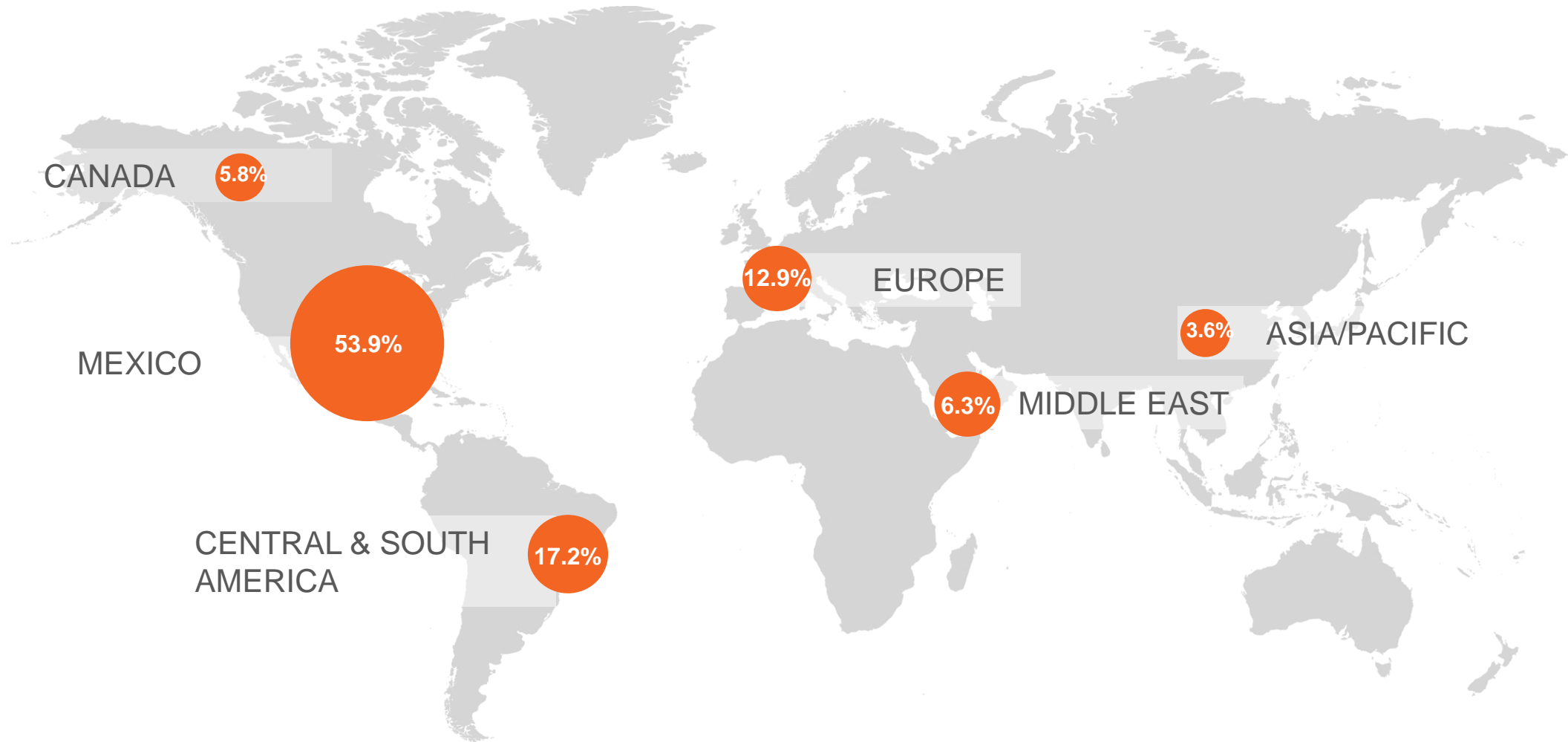
“My guess is that next summer will be the busiest over the Atlantic ever.” - *Scott Kirby, United Airlines CEO*

“European travel next spring and summer will look much like the busy summer airlines had for US domestic travel.” - *Ed Bastian, Delta Air Lines CEO*

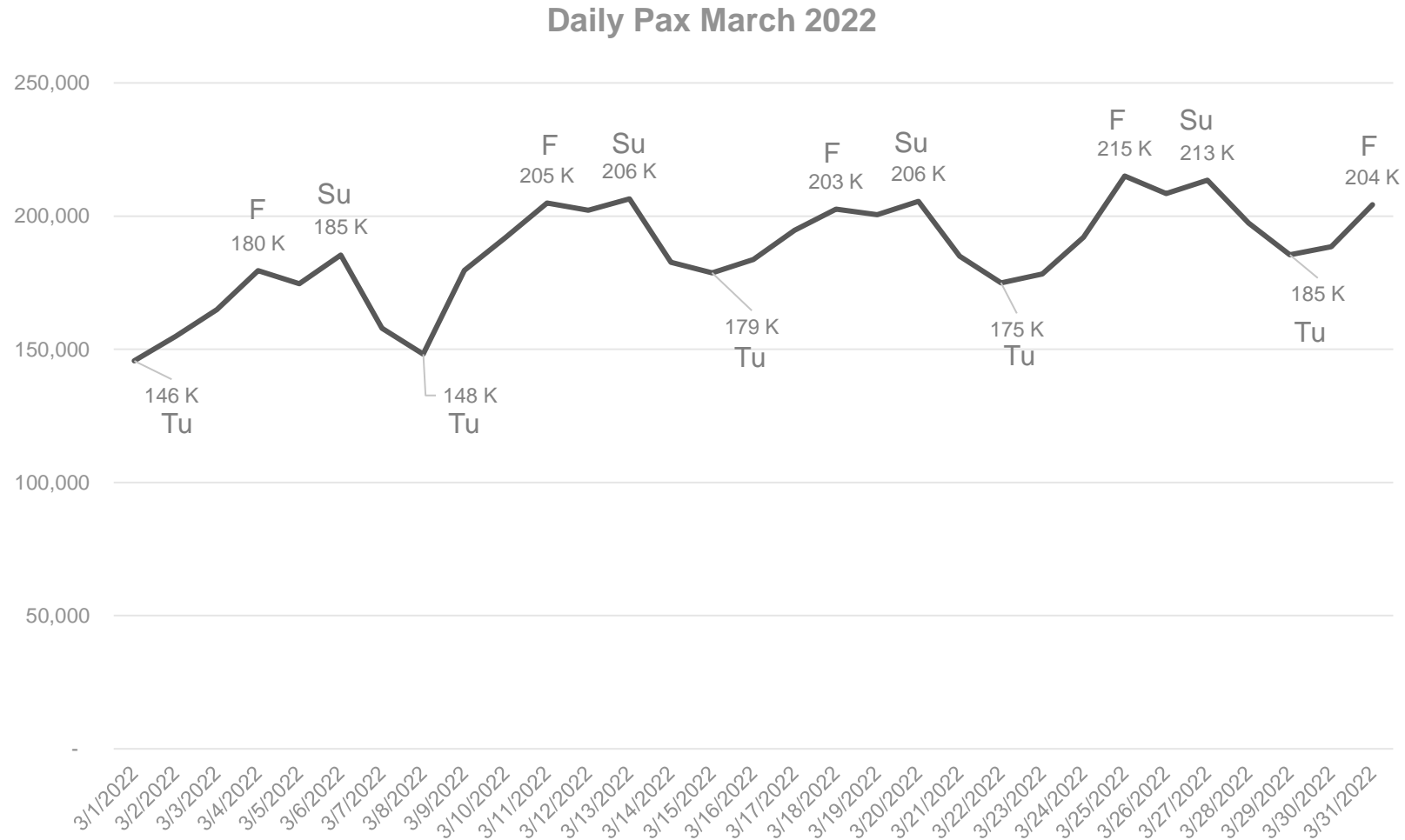
“69% of respondents prefer European destinations for the next leisure trip when restrictions are lifted.” - *Kaleido Intelligence*

FYTD Jan 2022 International Passengers

Mexico represents more than 1/2 of all international passengers

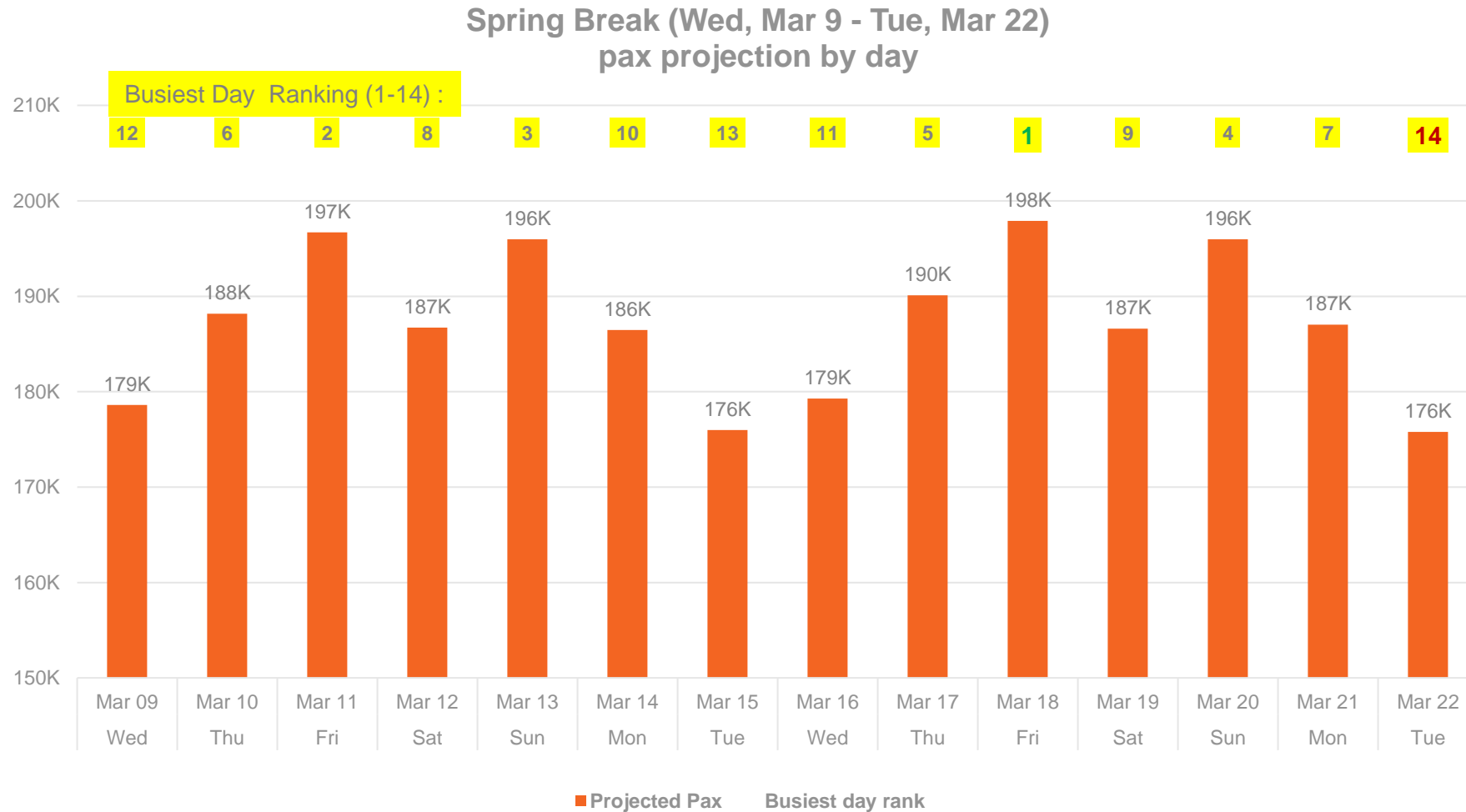


Pax trend by day (187K avg.) for March



**Mar pax fcst: 5.8M
(95% of Mar 2019)**

2.6M pax expected during Spring Break (96% of 2019 level)



22 new routes have started since the beginning of the pandemic

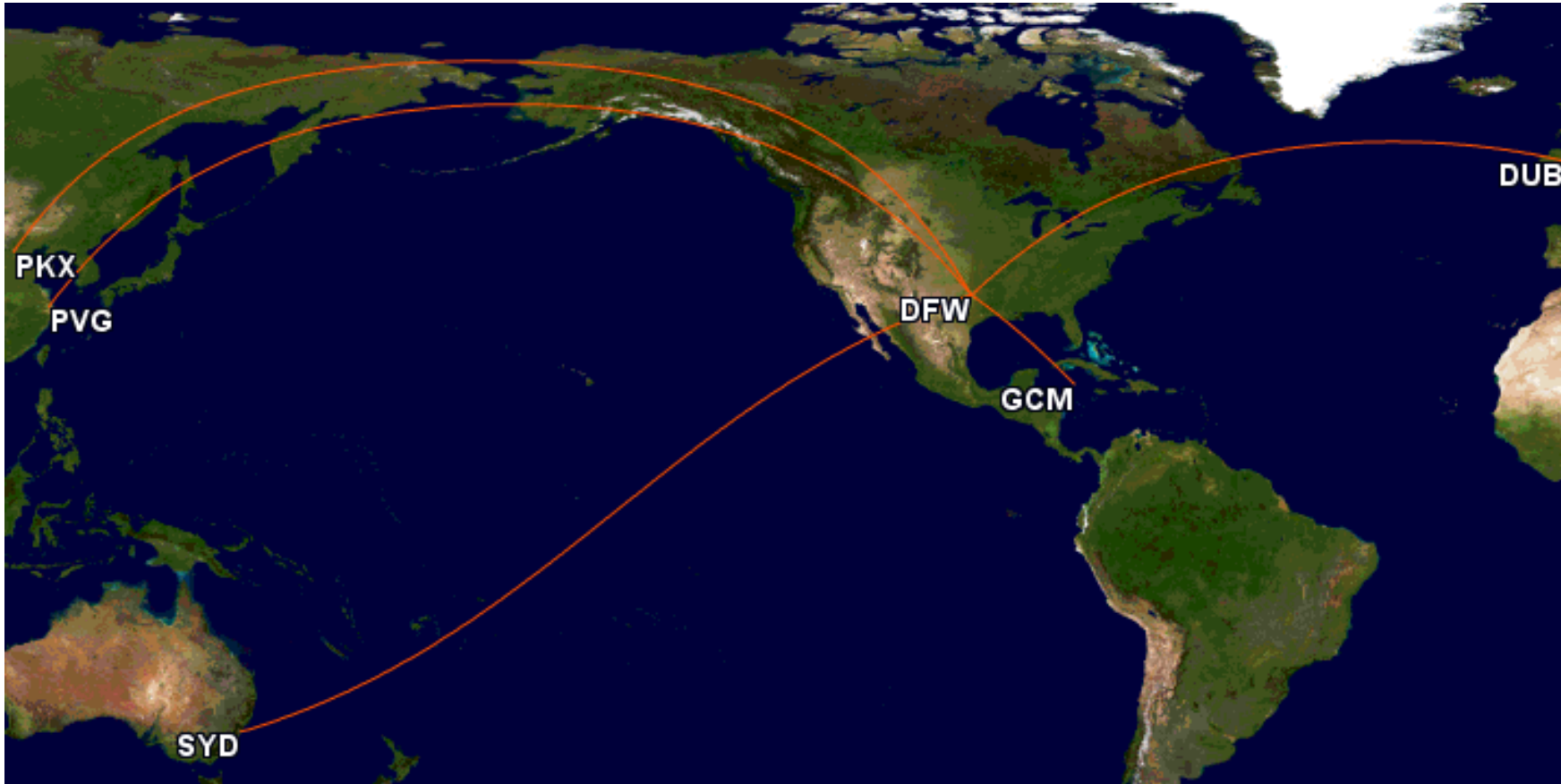


4 new destinations scheduled/intended to begin in 2022



Destination Code	City	Start Date
HEL	Helsinki, FI	3/27/2022
MDW	Chicago, IL,US	4/28/2022
TLV	Tel Aviv, IL	6/4/2022
AKL	Auckland, NZ	TBD

5 destinations scheduled to resume in 2022

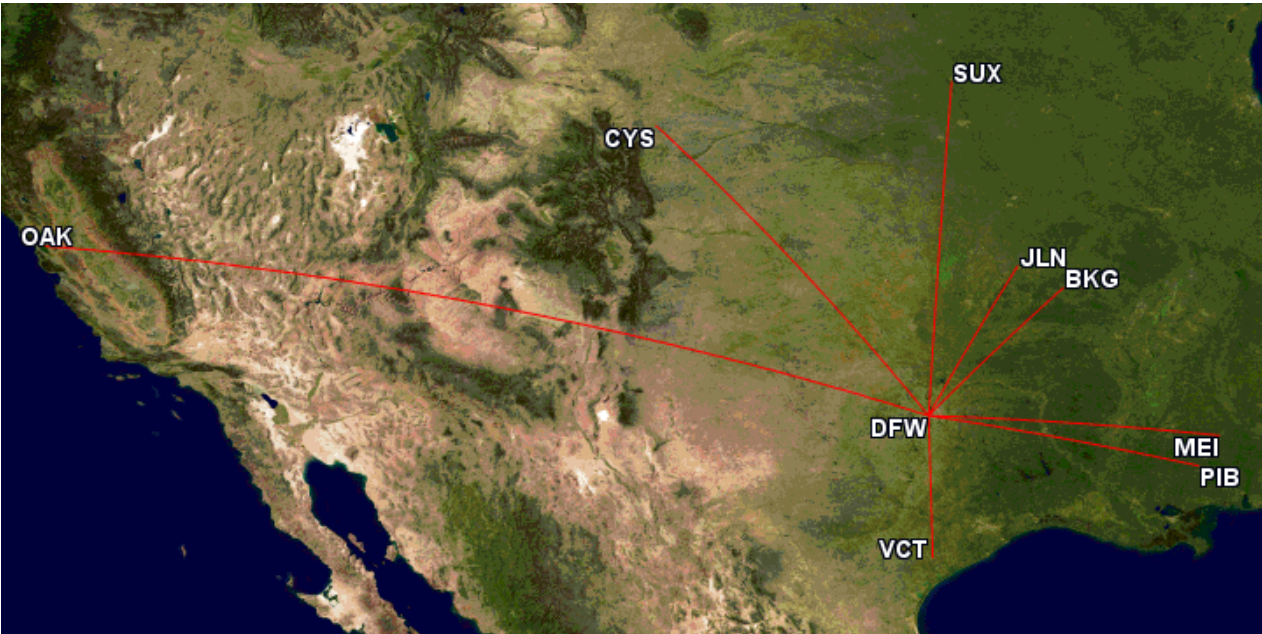


14 destinations not yet scheduled to return

Operated in CY 2019

8 Domestic

6 International



Source: diio.mi Schedules as of January 19, 2022



Closing Remarks

Ken Buchanan

Executive Vice President

Revenue Management and Customer Experience





Thank You