



Concessions February Webinar Prepare for Spring

February 13, 2024

Welcome

Zenola Campbell
Vice President
Concessions



Agenda

Welcome

Airlines Services Updates

Customer Insights

Operations

White Glove Awards

Recruiting / Marketing

Ready for Business

Performance Updates

Highlights from Winter Weather

Closing

Zenola Campbell

Floriana Trif

John Han

Zenola Campbell

Jill McGrew

Jennifer Simkins

Ken Buchanan

Air Services Update

Floriana Trif

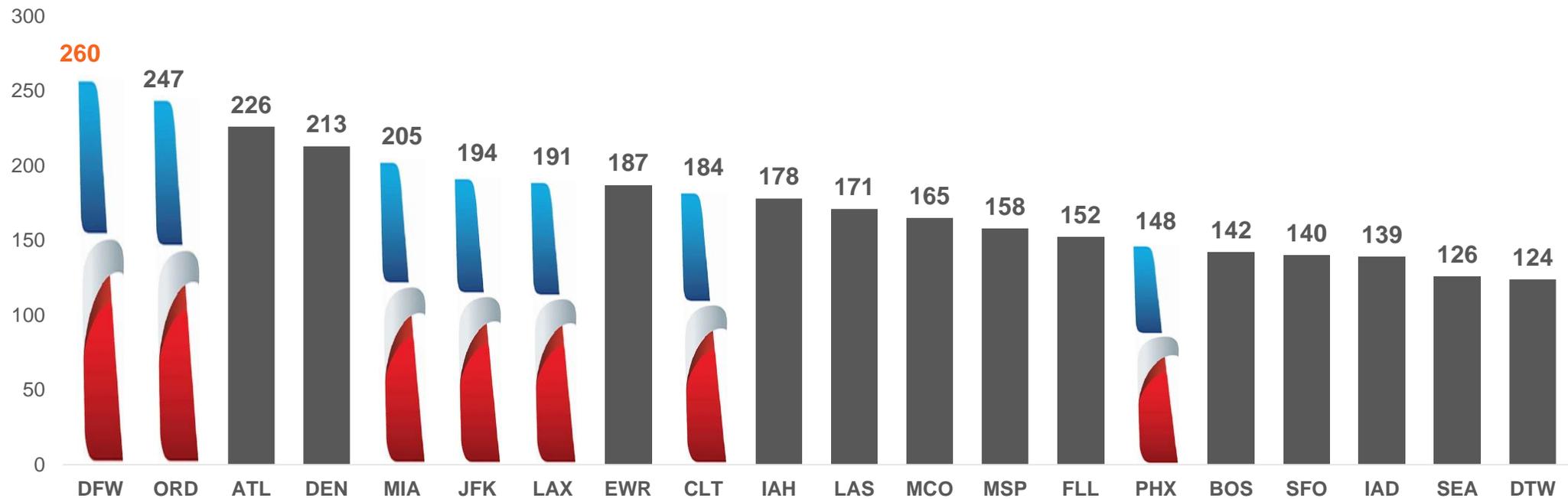
Senior Aviation Analytics Manager

Air Services

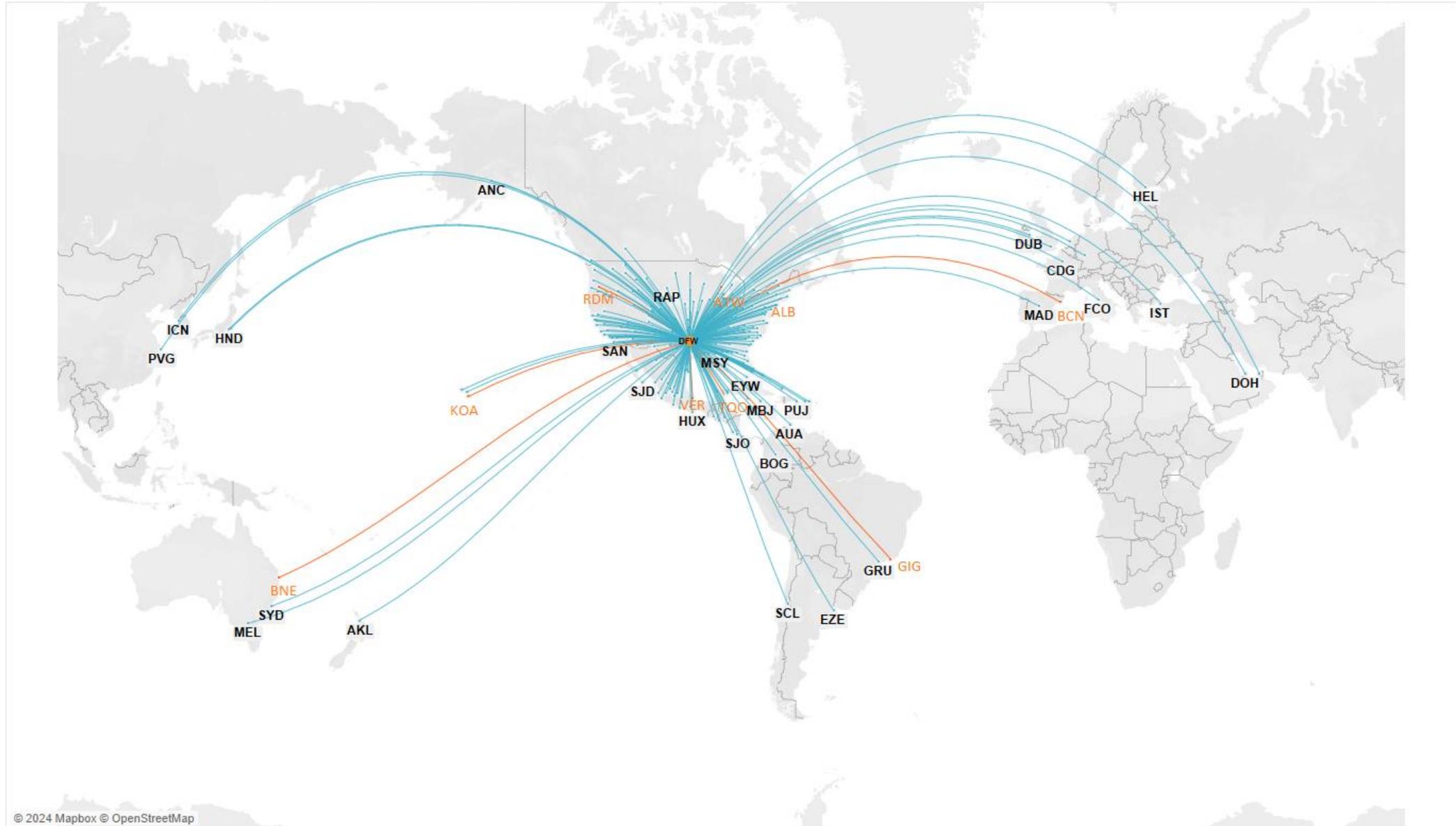


DFW leads all US airports with 260 total destinations

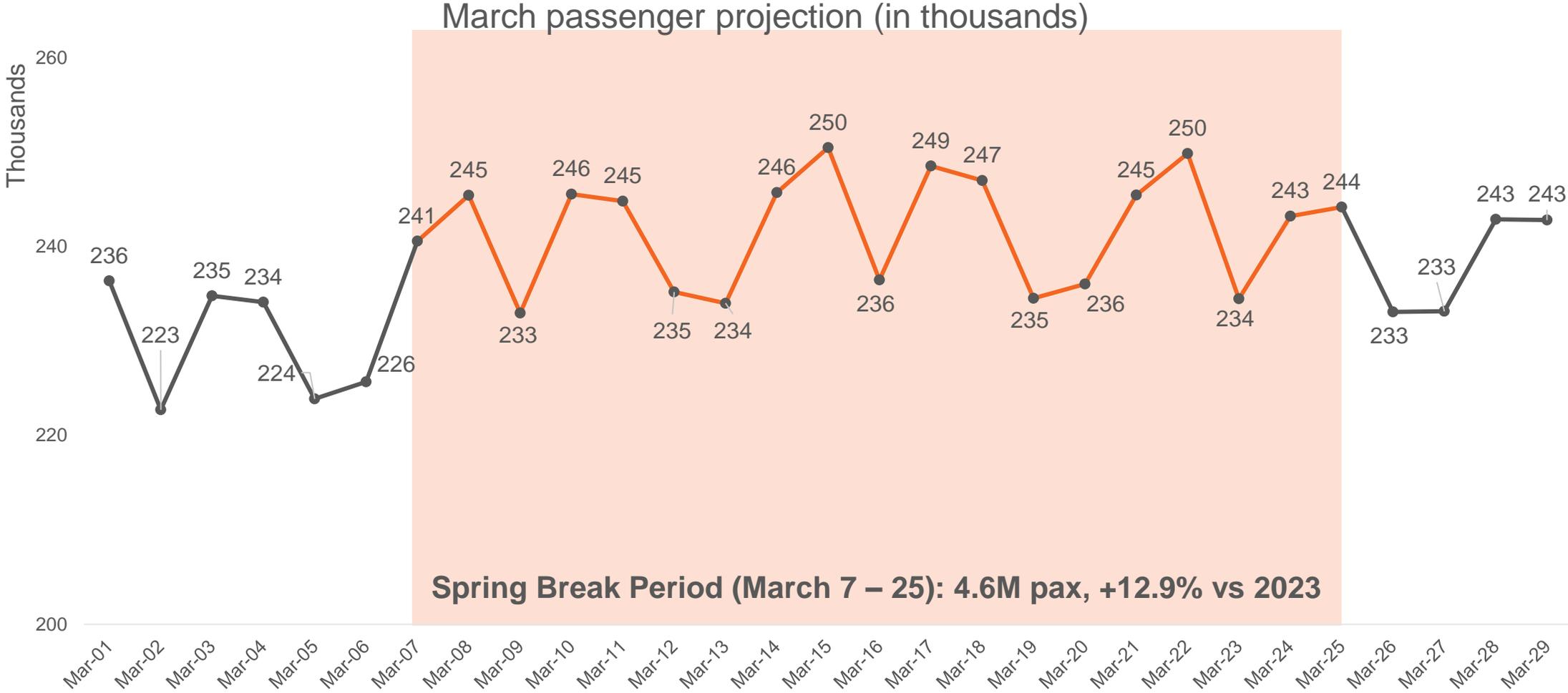
Destinations for major US airports
(YE Jan 2024)



9 new services added in FY24

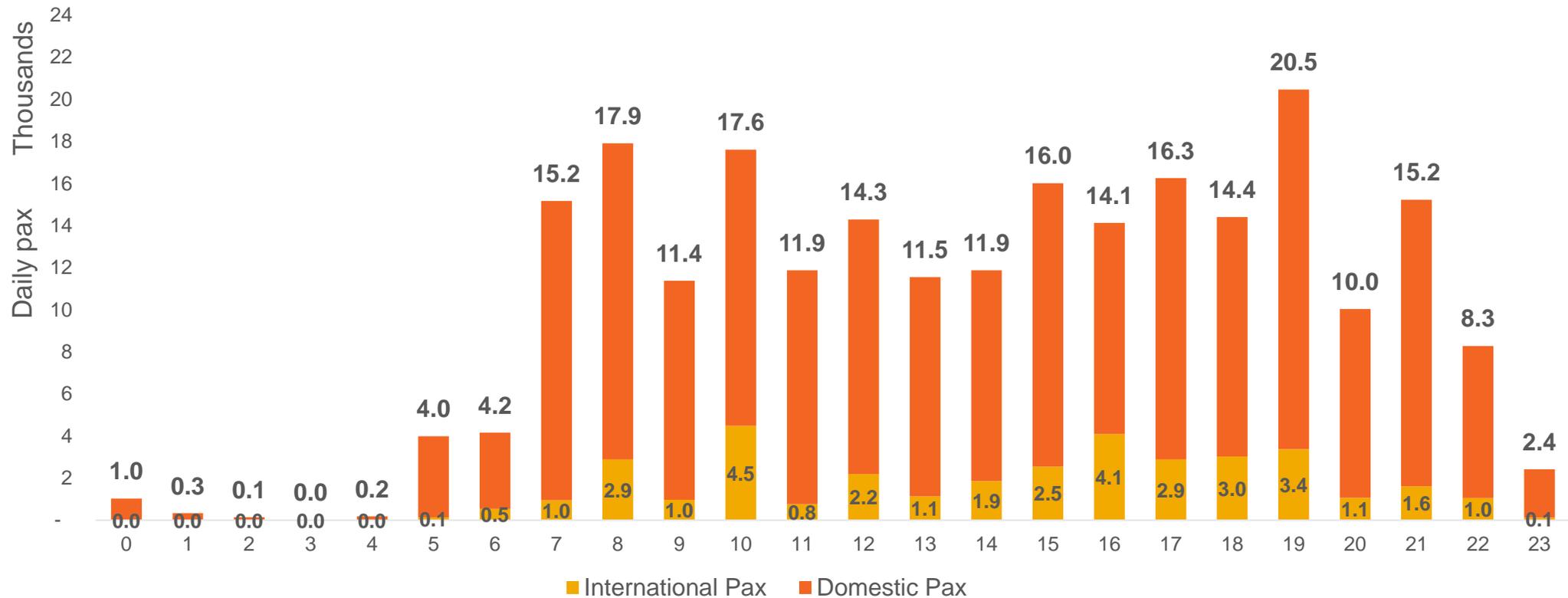


7.4M passengers are expected to travel in March, 12% above 2023 levels

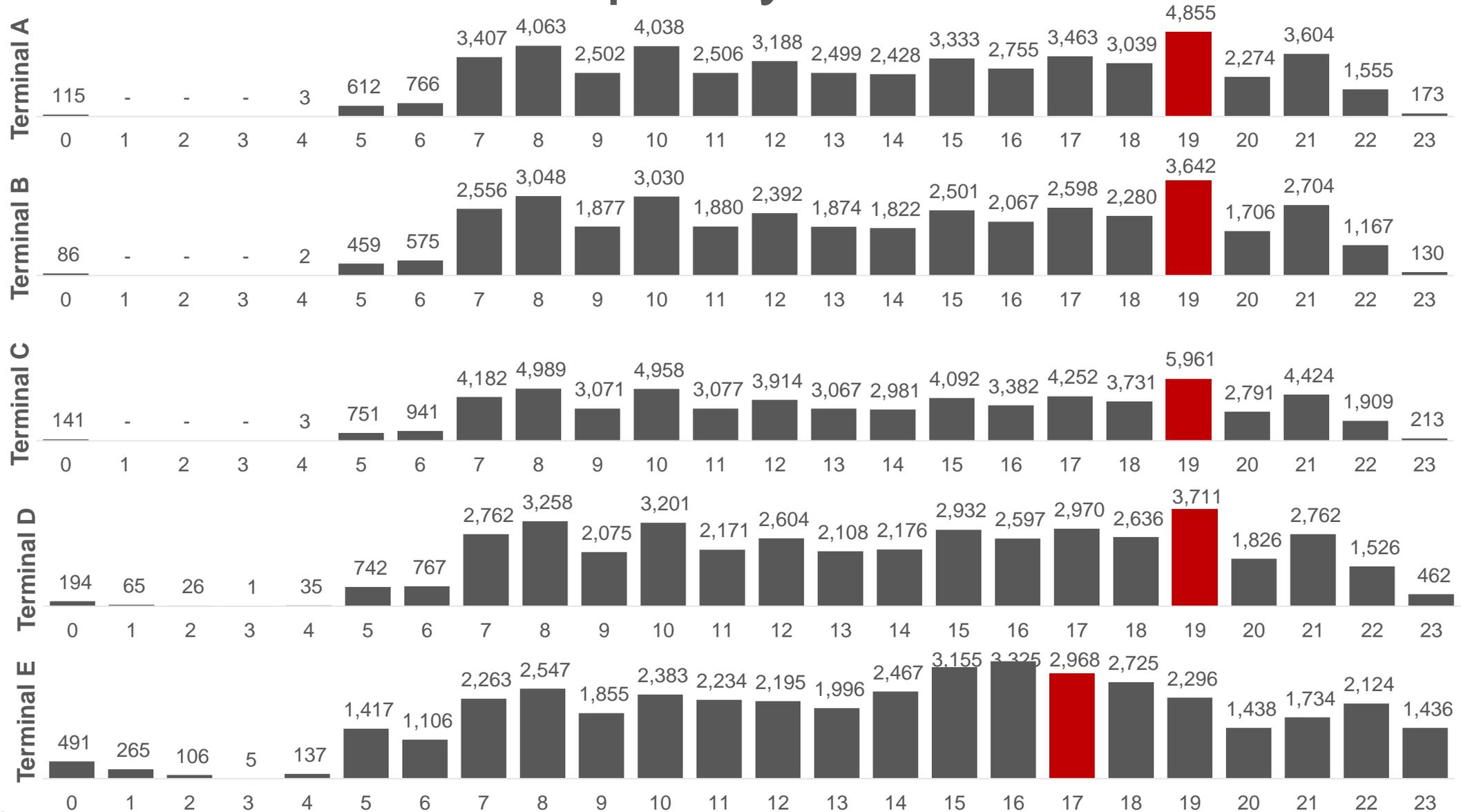


239K daily average pax for the month

Total pax peak at 1900 hour; International pax peak at 1000 hour



DFW terminal split by hour – March 2024

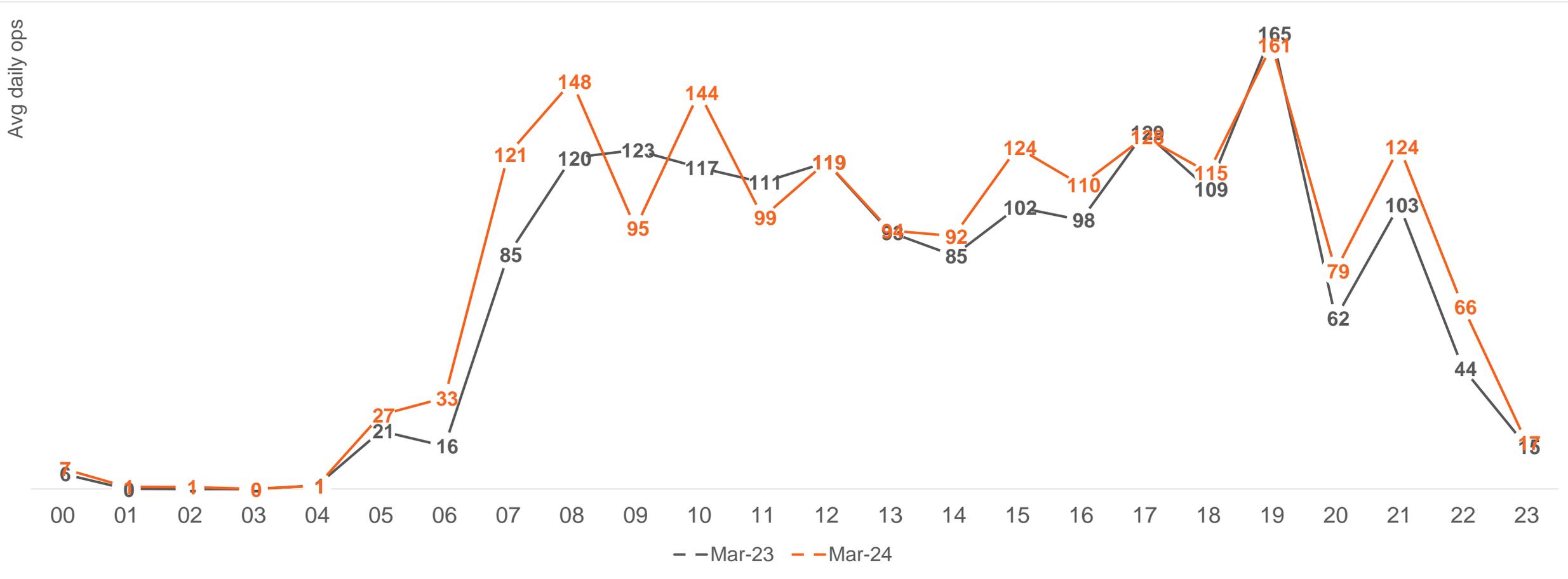


Source: DFW internal estimates



1,904 average daily ops, 11% above 2023 levels

Peak ops at 1900 hour





Customer Insights

John Han

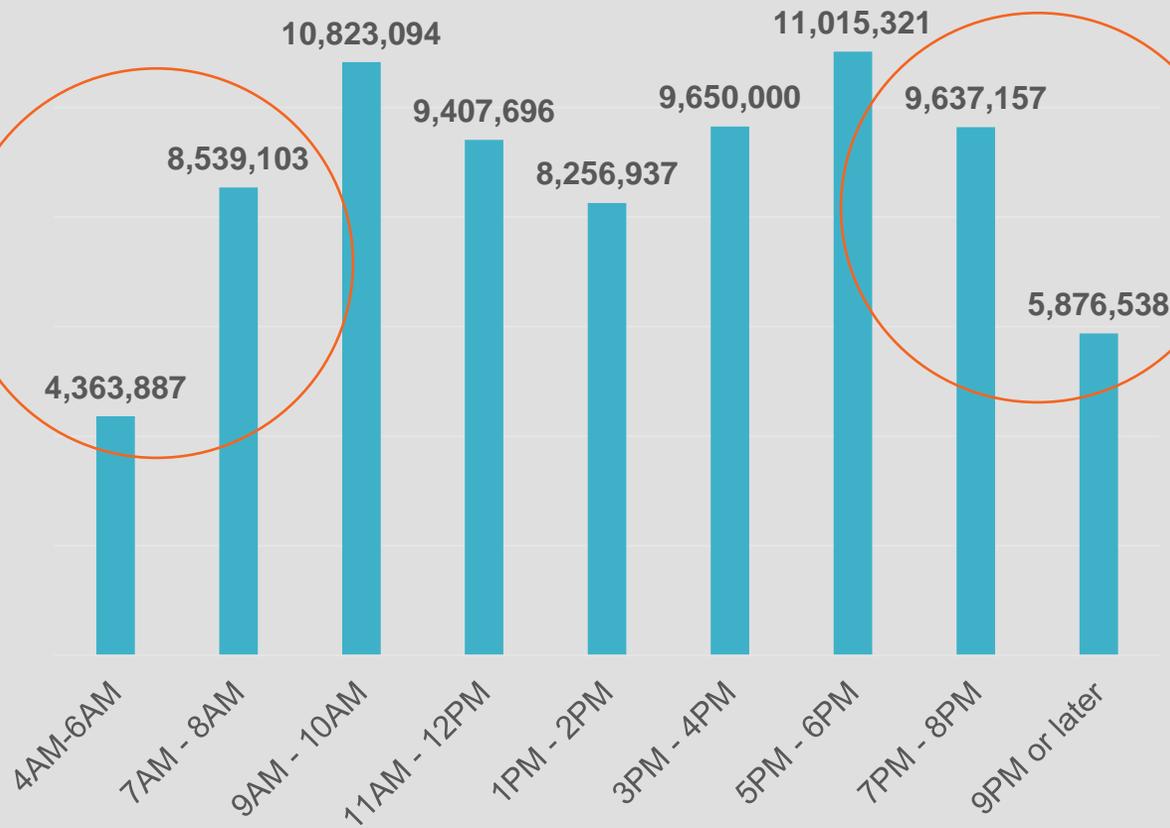
Senior Insights & Analytics Manager

Customer Experience



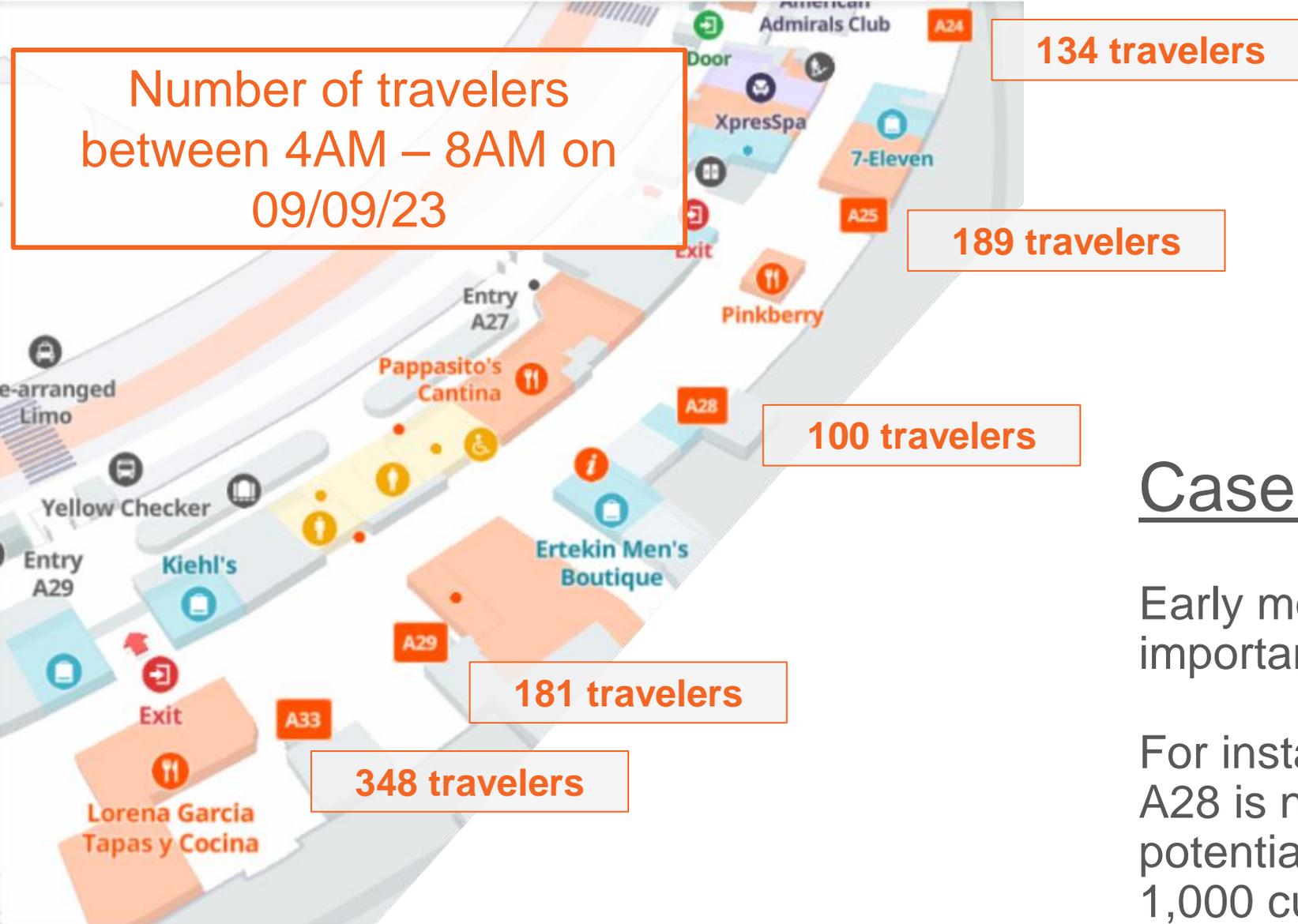
Your continued efforts have helped DFW achieve the 2022 ACI award for “Best Airport over 40 Million travelers in North America”.

DFW Total traveler by Time of Day
FY23



In FY23, we saw high a volume of travelers in the mornings and evenings.

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 X
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

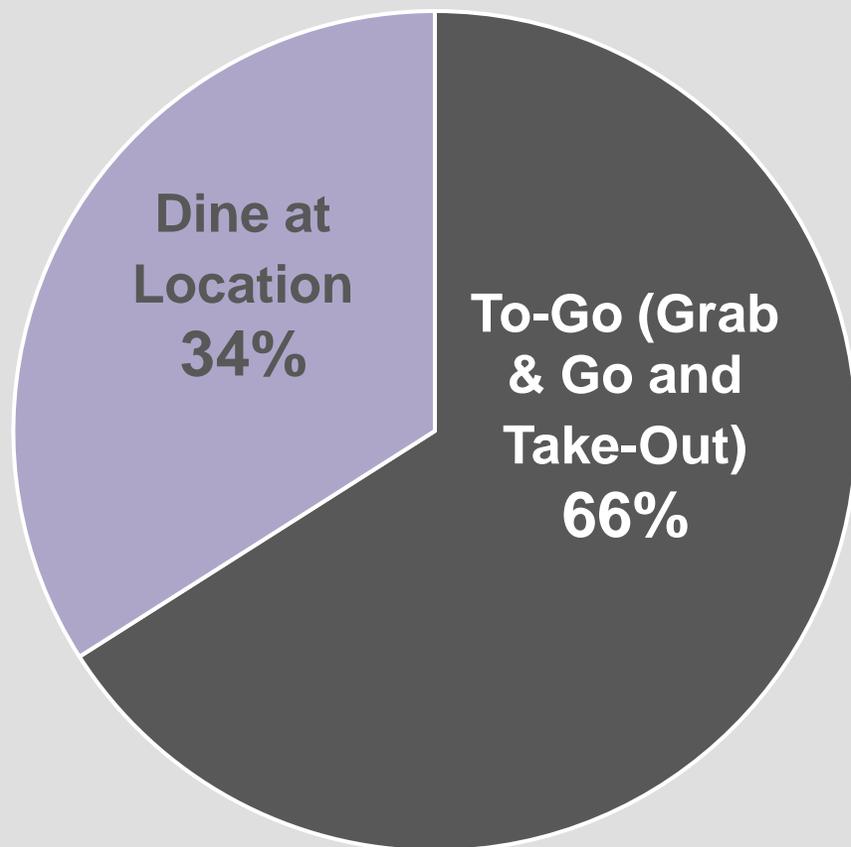


CONTROL



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.



Operations

Zenola Campbell
Vice President
Concessions





Open for Business

- The busiest spring break ever
- Flight banking starts early
- Lease hours will be adhered to
- Most travelers have an **on-the-go** mindset and want quick, convenient options.



✦ The White Glove Award ✦

DFW Concessions is excited to announce that we are bringing back The White Glove Award for FY2024.

Using the Mystery Shop scores, below are the following requirements to win an award:

- Cleanliness Average Score: 100, and
- Customer Service Average Score: 90 and above

Q1 FY2024 Winners will be announced soon via eNews

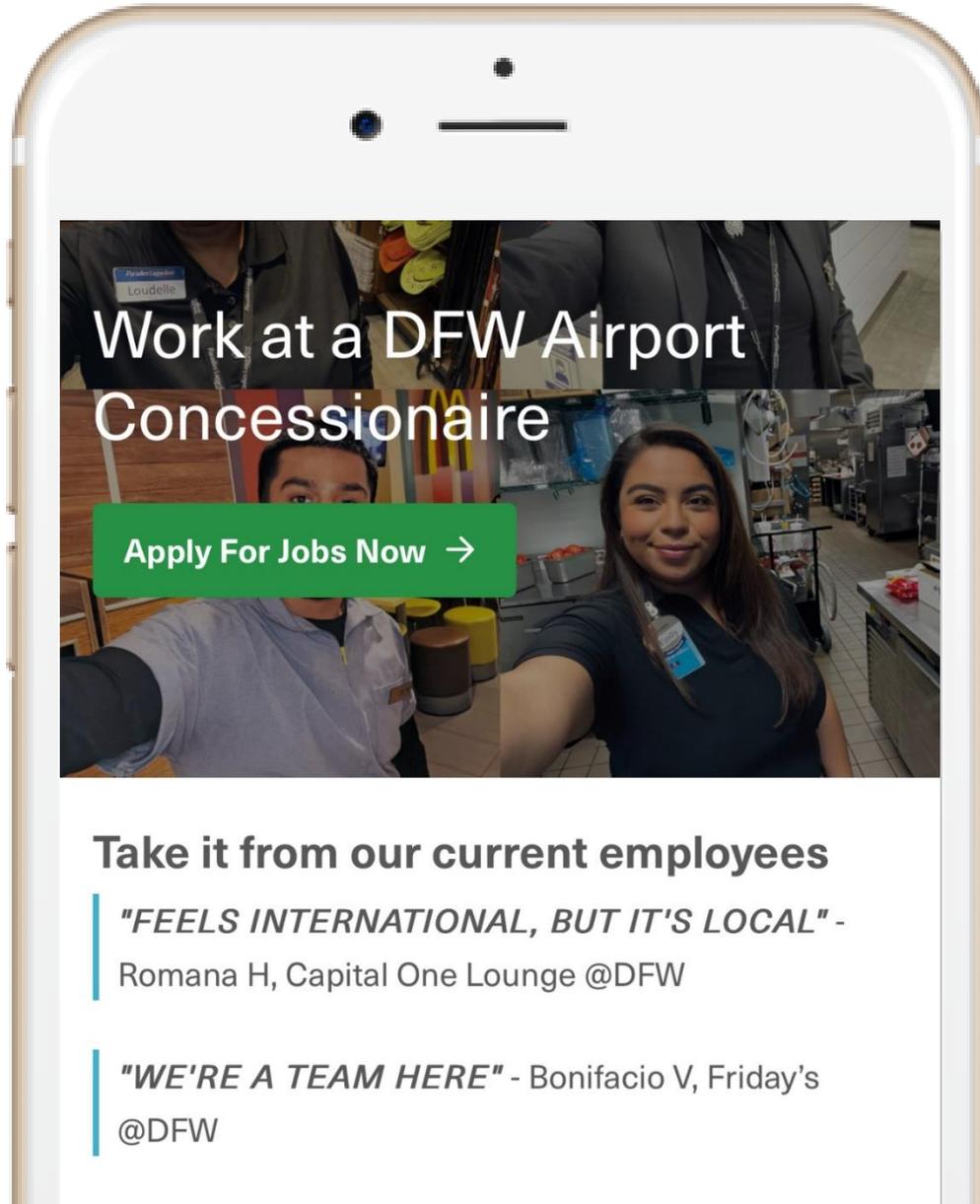


DFW Website Recruitment

Jobseekers can submit application forms online!

How to Participate:

- Email your DFW Concessions Manager
 - Provide your company's designated HR representative's name and email address.



The image shows a smartphone screen displaying a recruitment advertisement. At the top, there's a header image of two employees in a concessionaire setting. The text reads "Work at a DFW Airport Concessionaire" in white over a dark background. Below this is a green button with white text that says "Apply For Jobs Now →". Underneath the button, there are two quotes from current employees, each preceded by a vertical blue line. The first quote is "FEELS INTERNATIONAL, BUT IT'S LOCAL" - Romana H, Capital One Lounge @DFW. The second quote is "WE'RE A TEAM HERE" - Bonifacio V, Friday's @DFW.

Work at a DFW Airport
Concessionaire

Apply For Jobs Now →

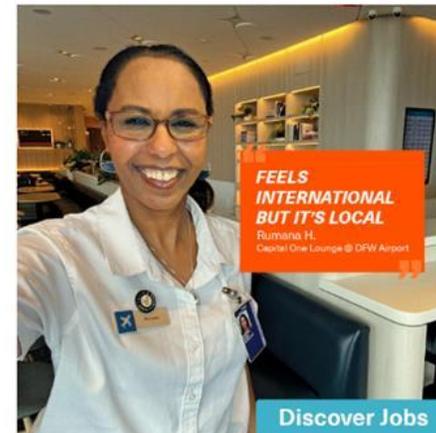
Take it from our current employees

"FEELS INTERNATIONAL, BUT IT'S LOCAL" -

Romana H, Capital One Lounge @DFW

"WE'RE A TEAM HERE" - Bonifacio V, Friday's

@DFW



MyDFWConnection Newsletter Recruitment Ad

Let Your Career Take Flight!

Come be a part of the journey. Work at one of the largest airports in the world. Submit your information today to get started.

Explore jobs >

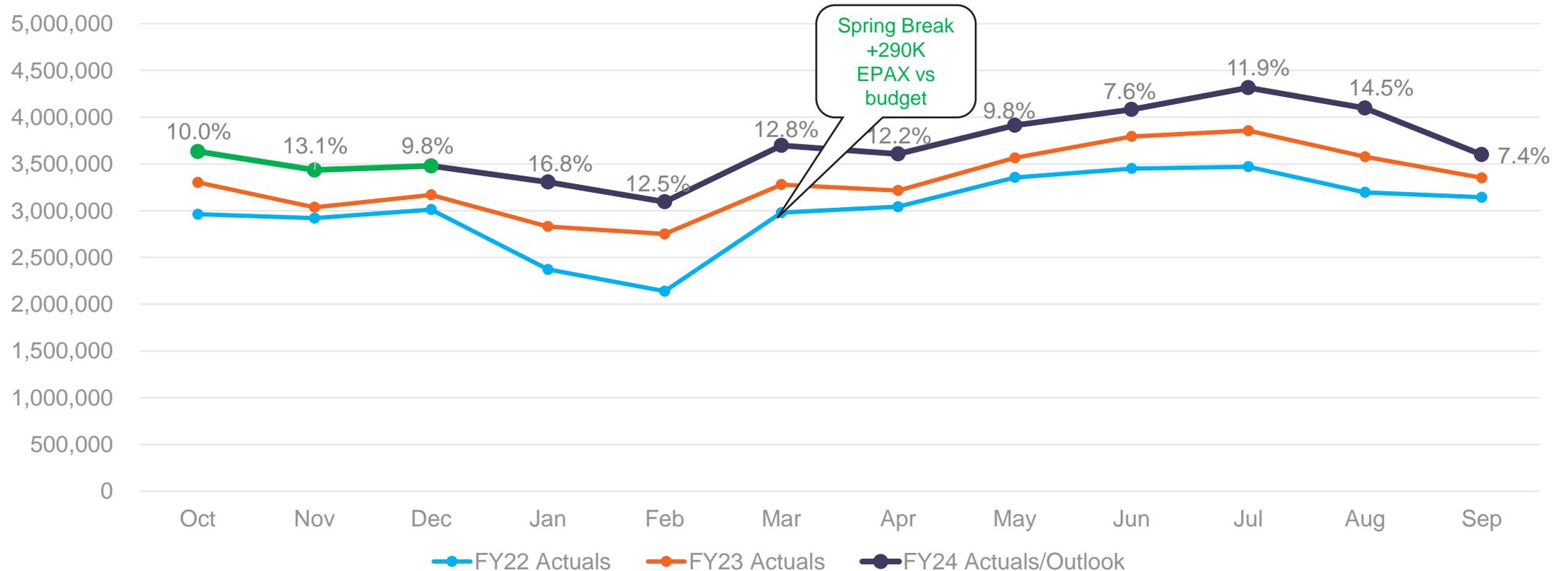
Performance Update

Jill McGrew
Concessions Manager



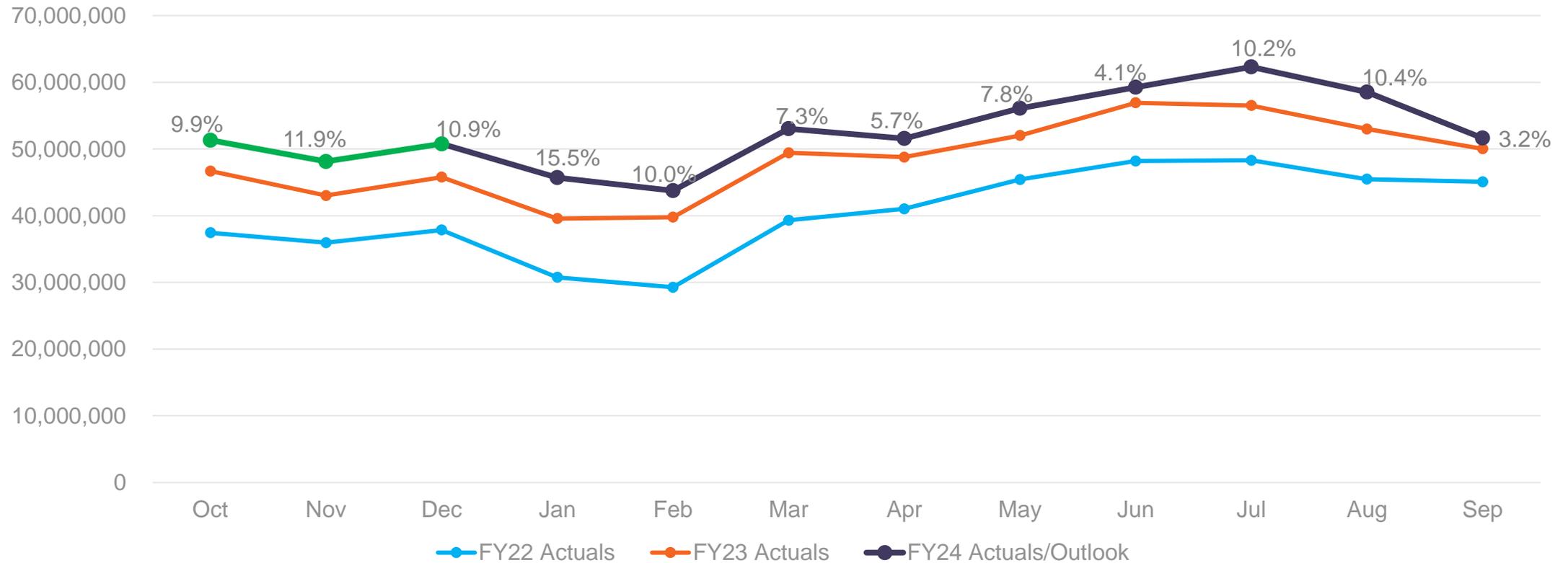
Total Enplaned Passengers FYTD through Dec

FY24 Enplaned Passengers are expected to be up 11.4% vs FY23, up 22.8% over FY22



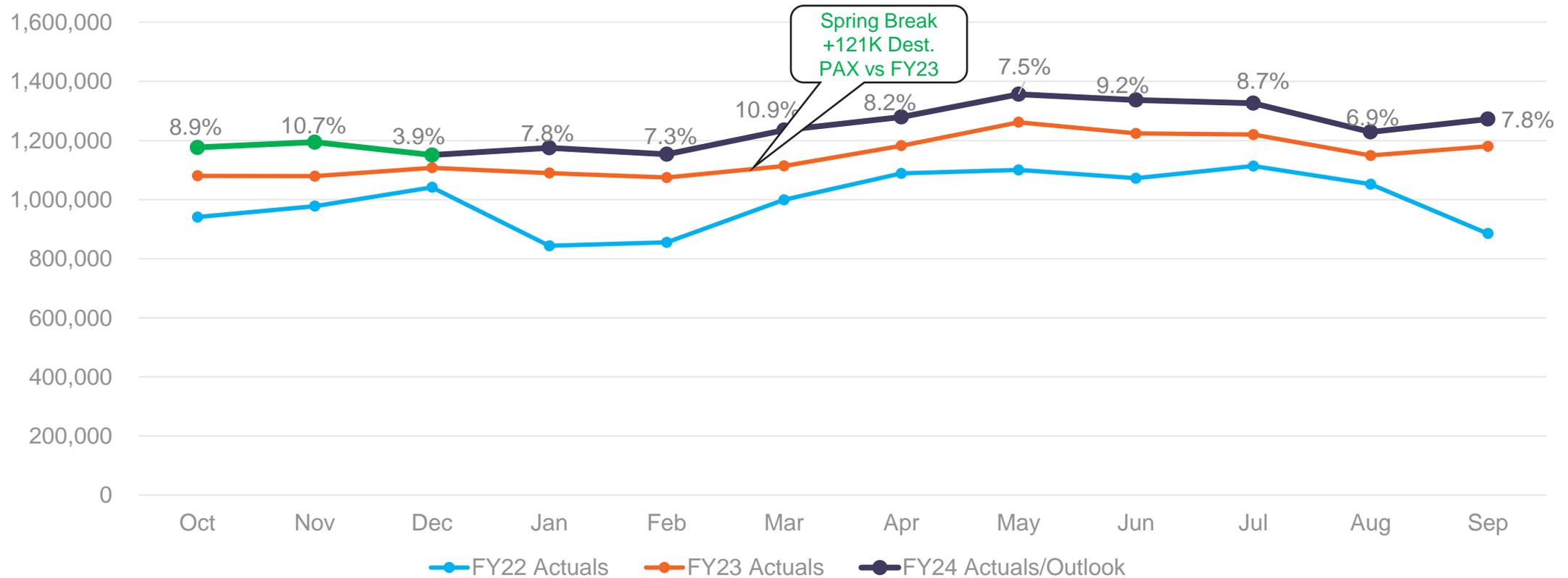
Total Gross Receipts FYTD through Dec

FY24 gross receipts are expected to be up 8.7% vs FY23, up 30.6% over FY22



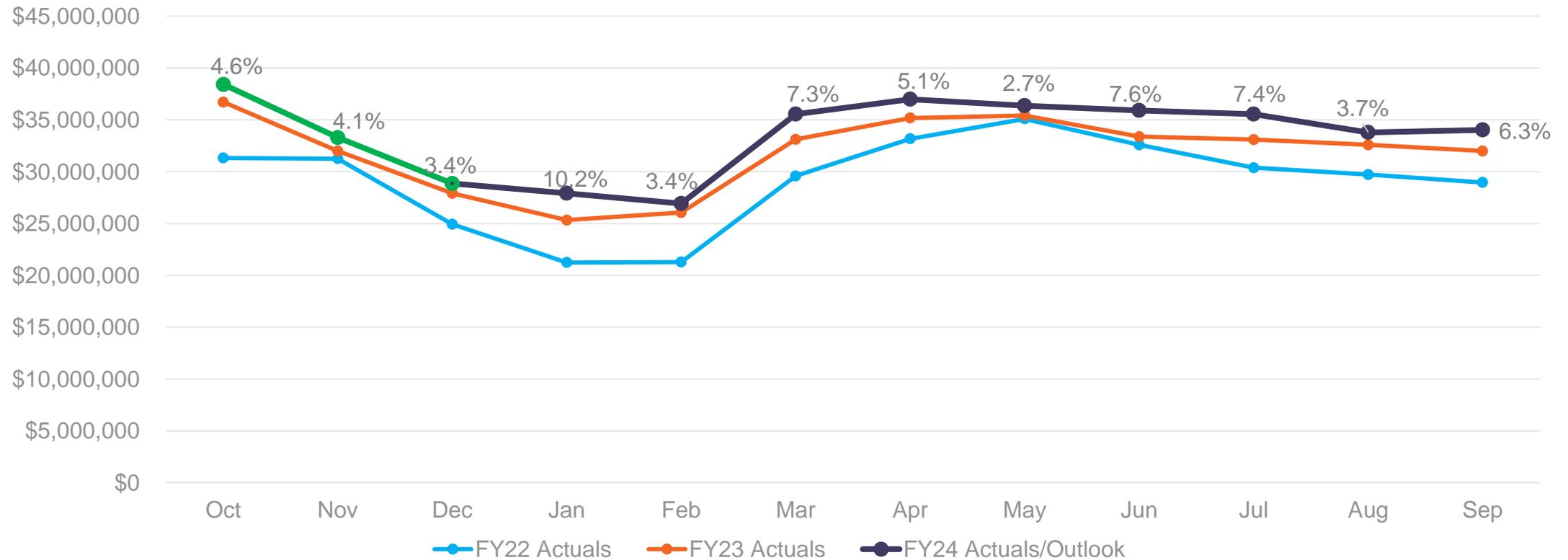
RAC Destination Passenger FYTD through Dec

FY24 Destination Passengers are projected to be up 8.1% vs FY23, up 24.3% vs FY22



RAC Gross Receipts FYTD through December

FY24 gross receipts are projected to be up 5.4% vs FY23, up 15.5% vs FY22



Highlights from Winter Weather

Jennifer Simkins
Assistant Vice President
Concessions



Weather Event Catering

THANK YOU!!



2,897
Meals



Closing Remarks

Ken Buchanan

Executive Vice President

Revenue Management and Customer Experience



Thank You

Concessions Survey

