
Concessions Webinar Getting Ready for the Holidays

October 17, 2023

Welcome

Zenola Campbell

Vice President, Concessions





Agenda

Welcome / New Concessions
Employees

Air Services Update

Sales Projections EOY

Upcoming Construction

Mystery Shop Projections

Customer Experience Update

Getting Ready for Business

Closing

Zenola Campbell

Bill Nesbitt

Jill McGrew

Tammy Huddleston

Jill McGrew

Sharon McCloskey

Jennifer Simkins

Ken Buchanan

New Concessions Employees

Zenola Campbell

Vice President, Concessions





Amanda Souza

Assistant Vice President, Concessions



Sabrina Khater

Concessions Manager

New Concessions Employees



Sholonda Edwards
Concessions Records Assistant



Andrew Furtado
Concessions Project Coordinator



Juhee Kim
Department Controller

Air Service Updates

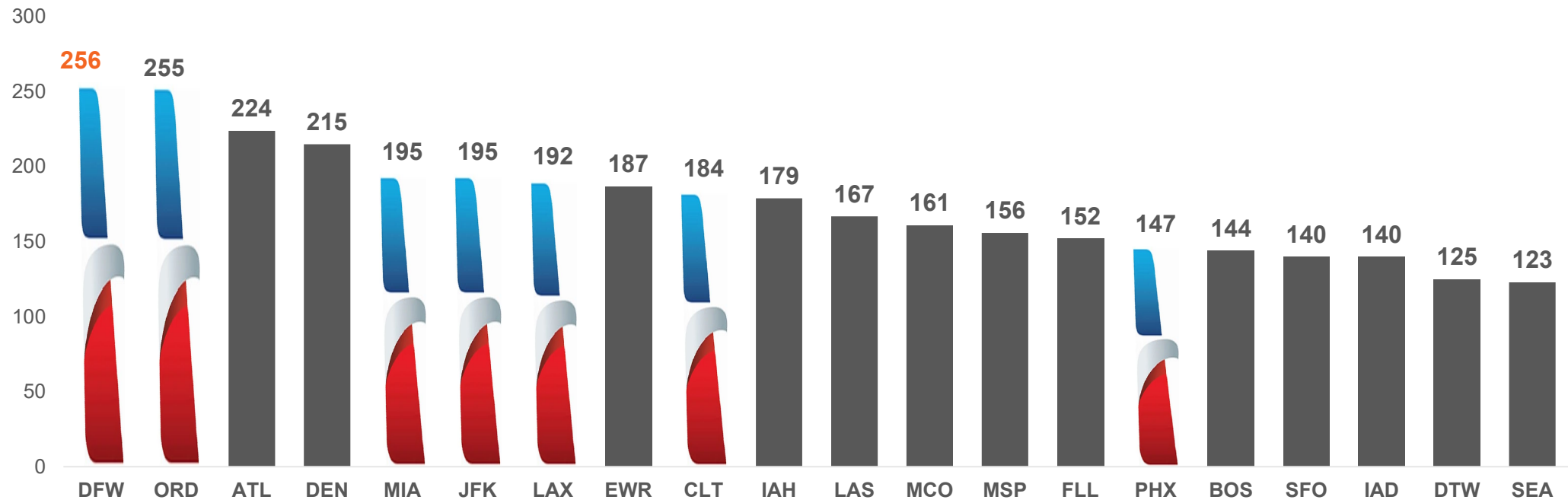
Bill Nesbitt

Senior Manager, Cargo Business Development



DFW leads all US airports with 256 total destinations

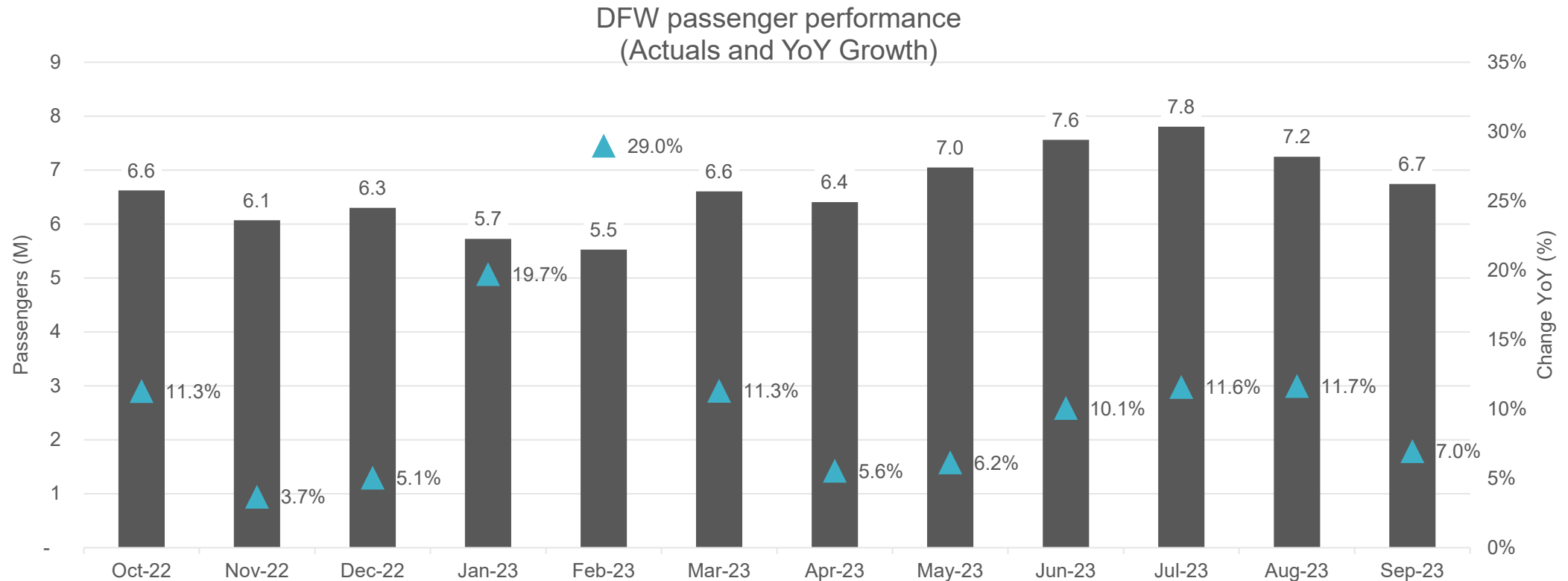
Destinations for major US airports
(YE Sep 2023)



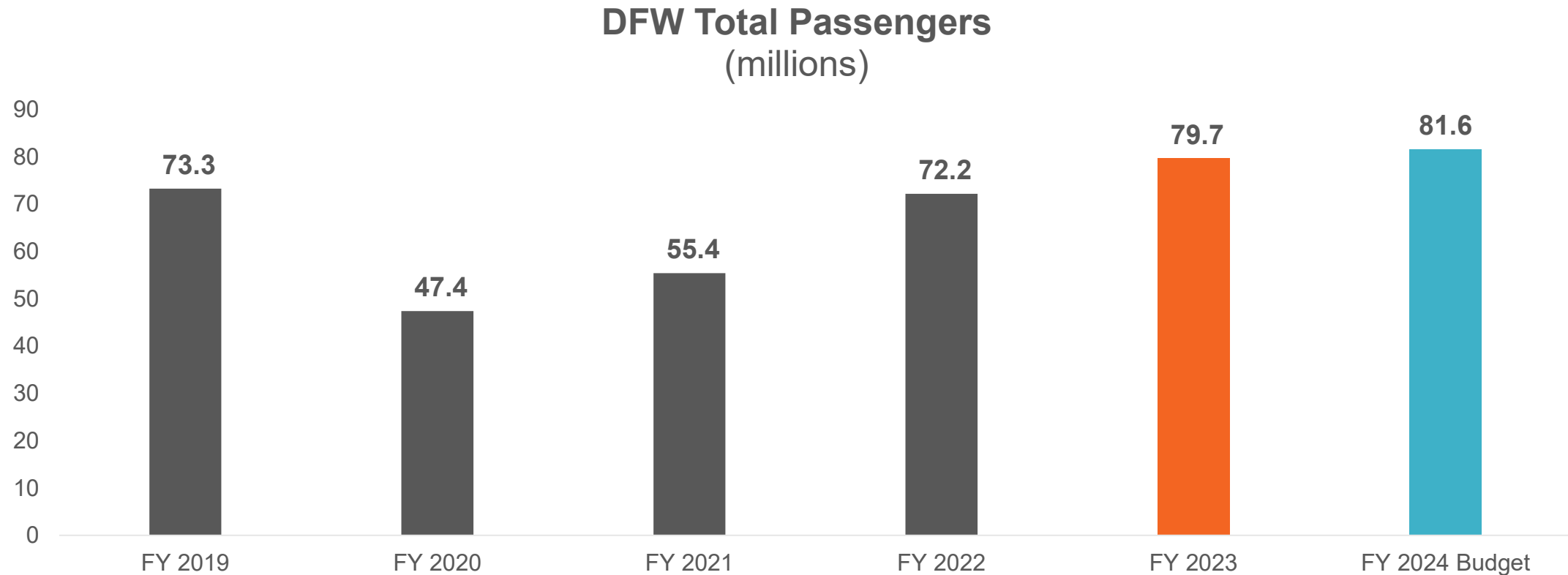
2 new services added in FY24



FY23 total passenger traffic grew 10% over FY22

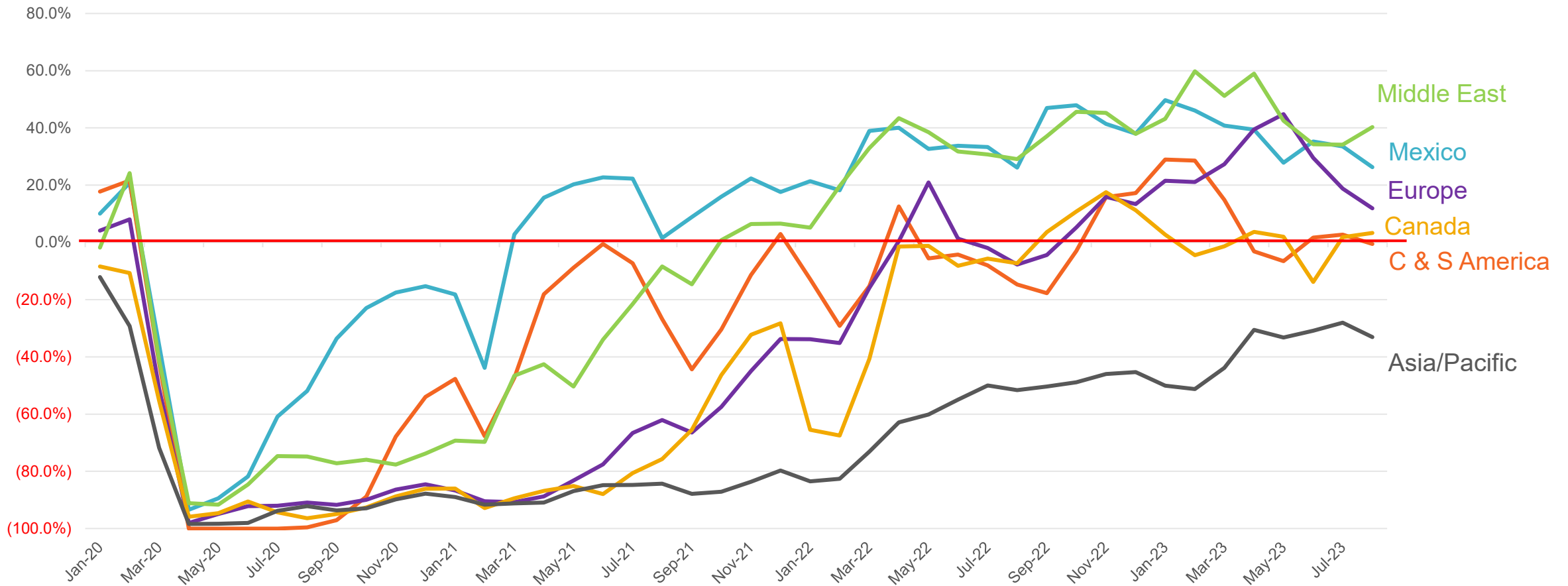


FY23 total passenger traffic exceeded pre-pandemic levels by 9%

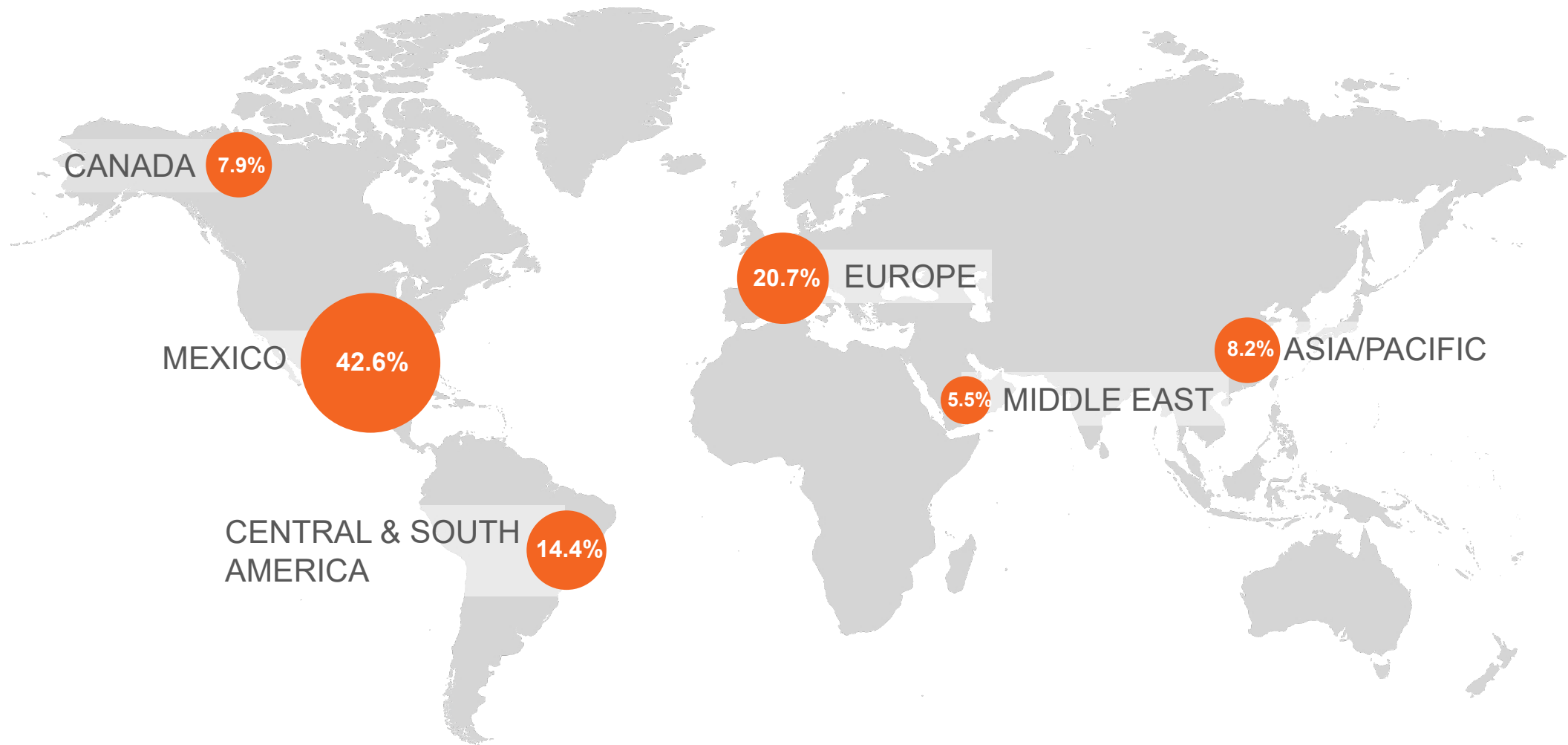


International regional traffic has exceeded pre-pandemic levels with exception of Asia/Pacific

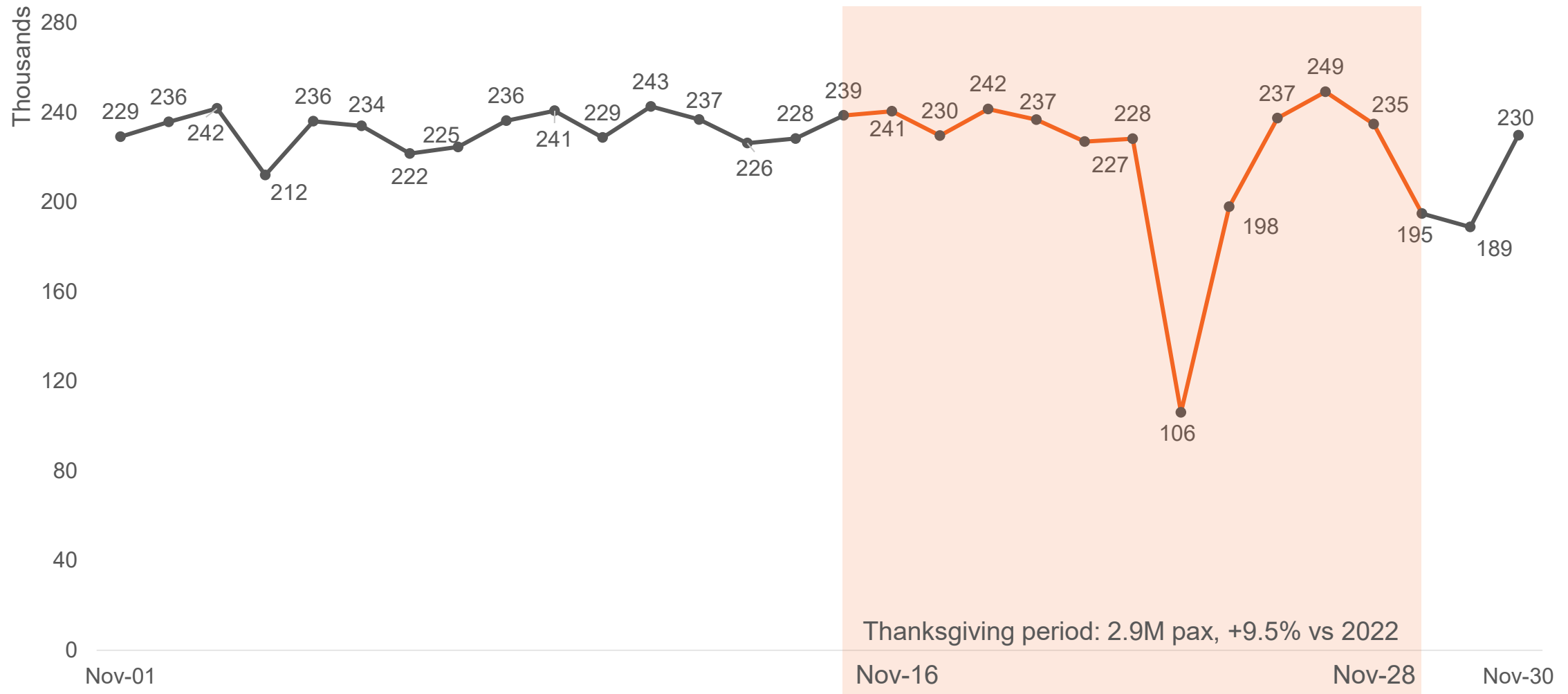
Pax vs 2019



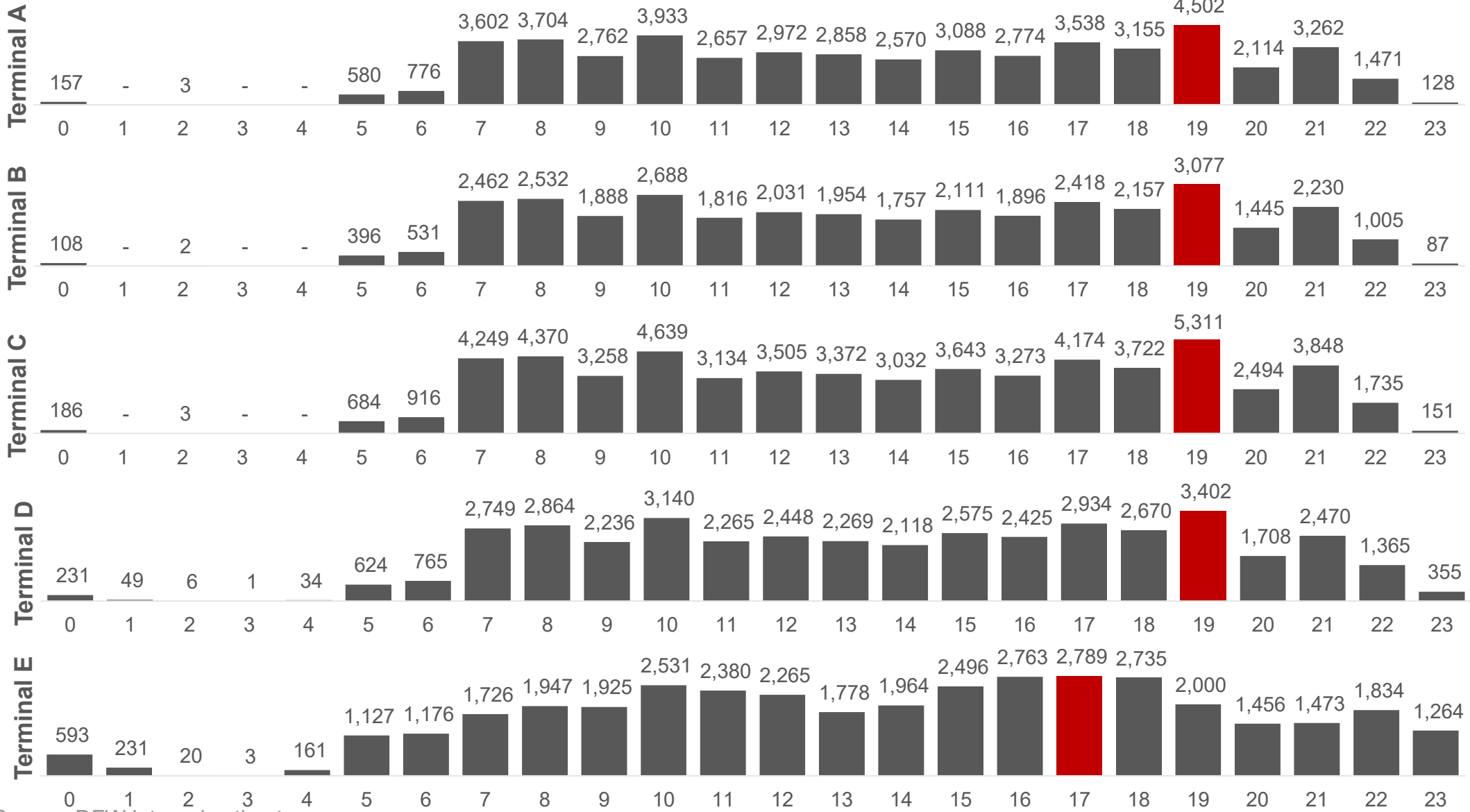
Mexico represents nearly 1/2 of all international passengers



6.8M passengers are expected to travel in November, 11.3% above 2022 levels



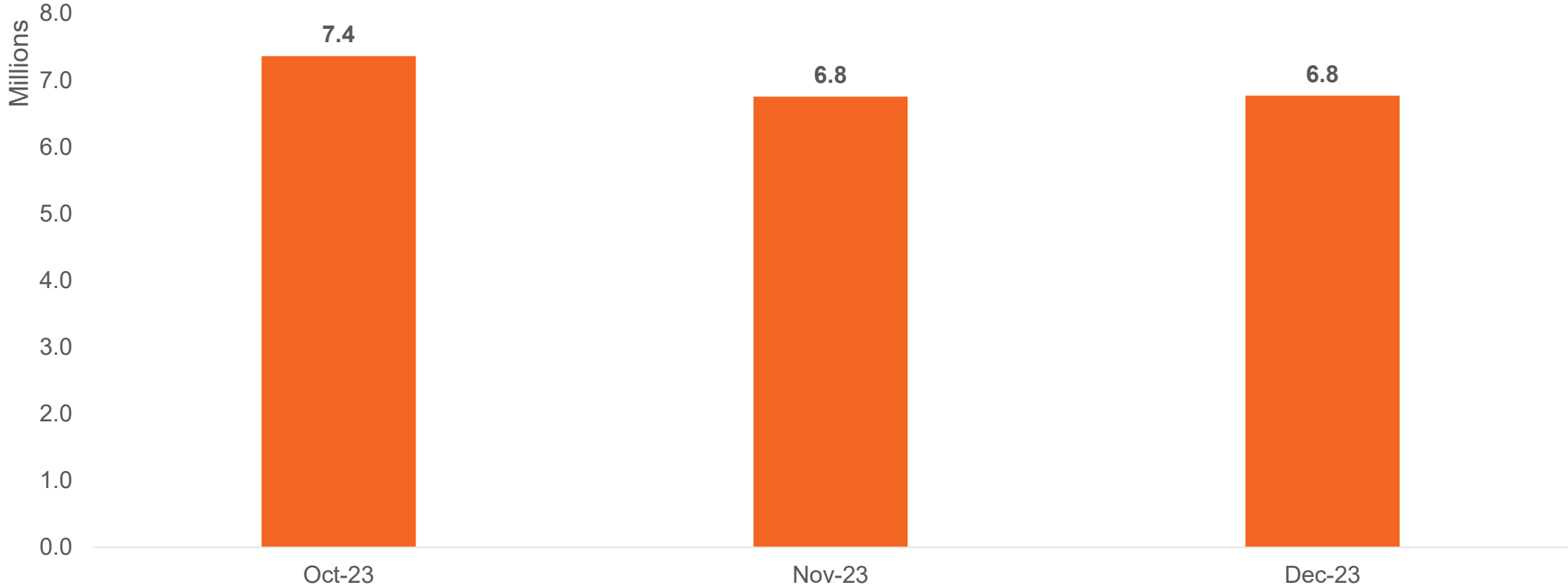
DFW terminal split by hour – November 2023



Source: DFW internal estimates



Q4 passengers are projected to be 10% above 2022 levels



Sales Projections EOY

Jill McGrew

Concessions Manager



DFW Airport's Busiest Day in History!

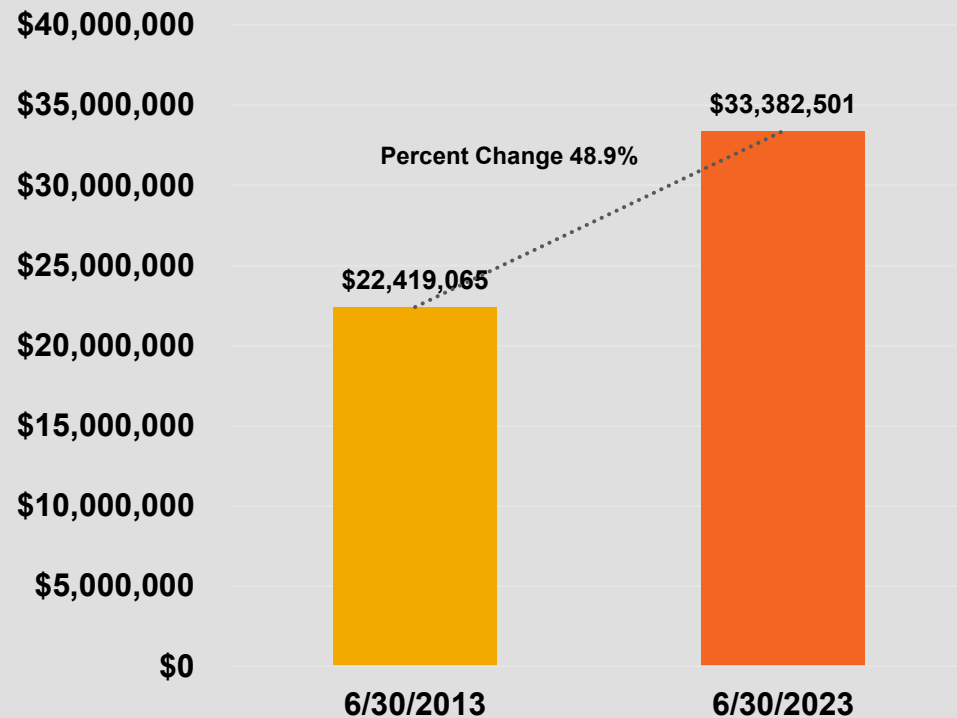
June 30, 2023, had a record 281,339 Passengers!



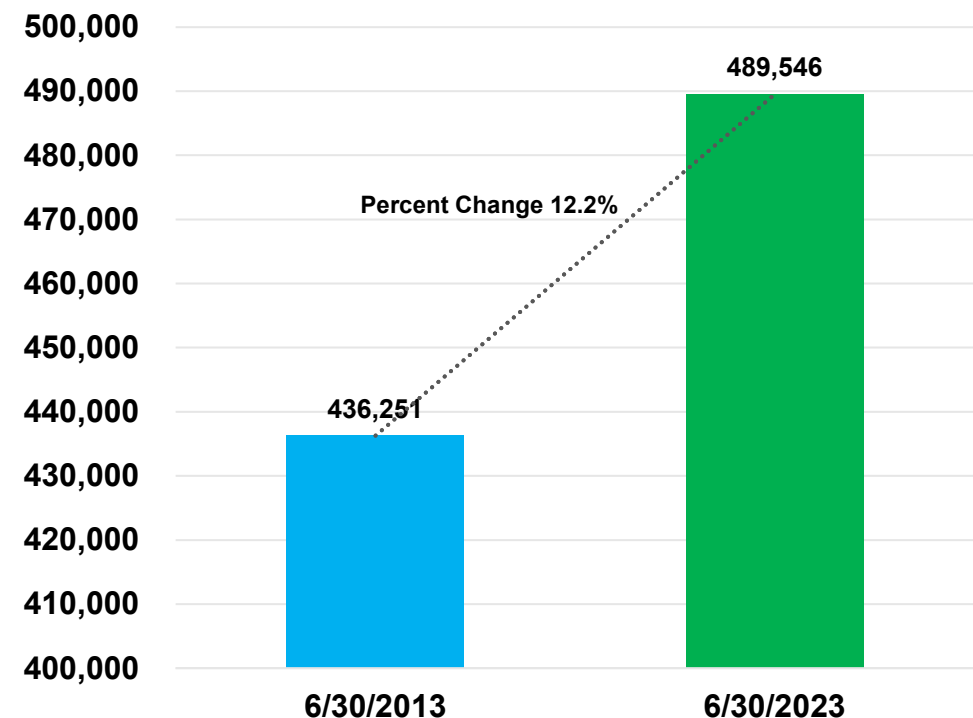
DFW Airport's Busiest Day in History!

June 30, 2013, had a record 281,339 Total Passengers

RAC Gross Receipts

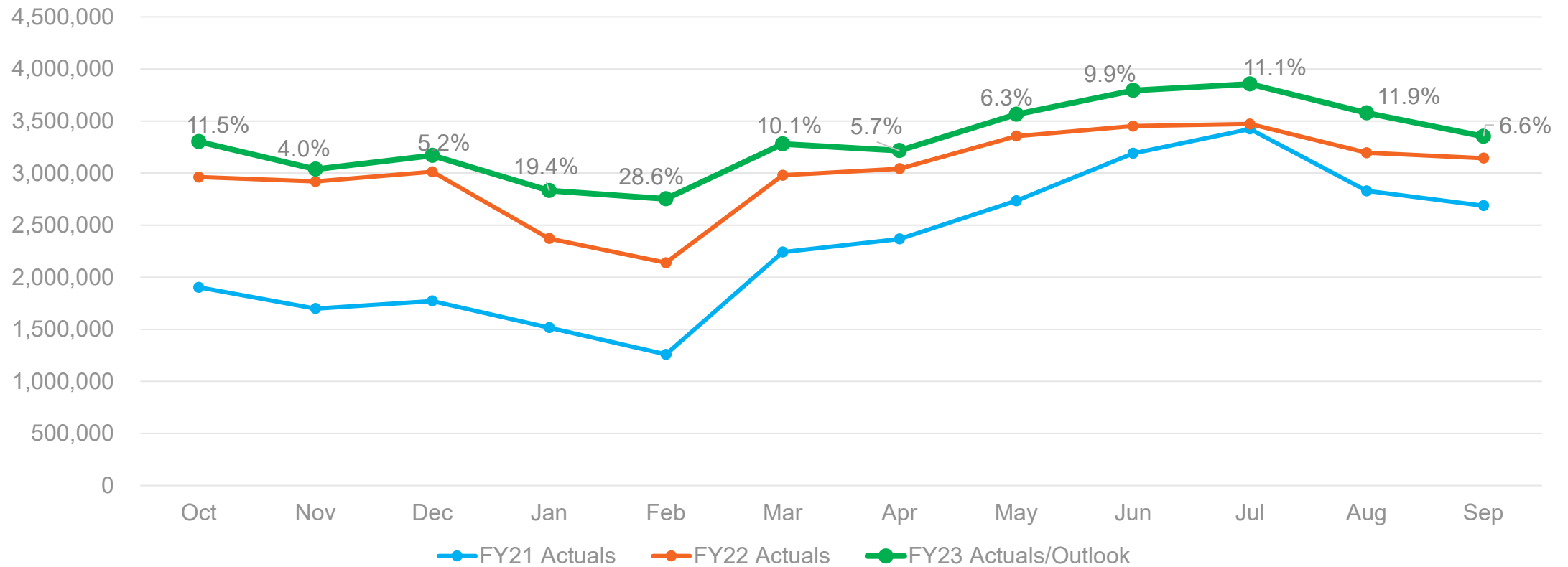


RAC Transaction Days



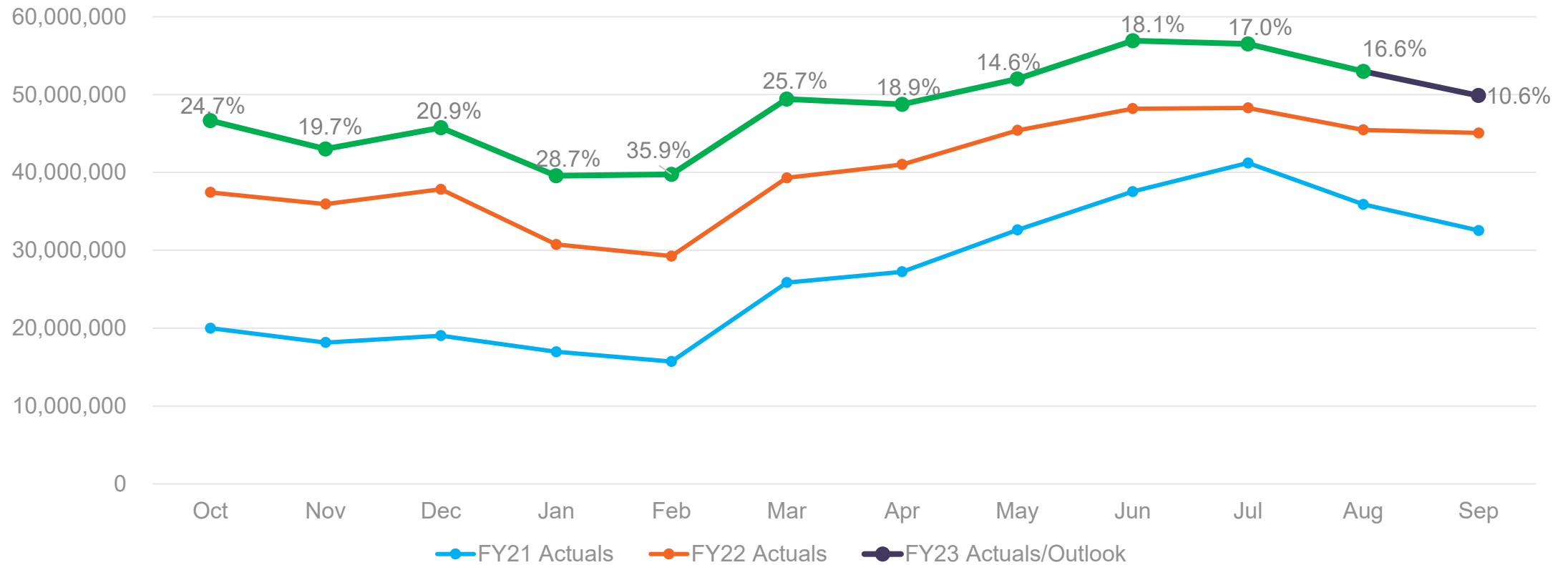
Total Enplaned Passengers FY23 through September

FY23 Enplaned Passengers were to be up 10.2% vs FY22, up 43.8% over FY21



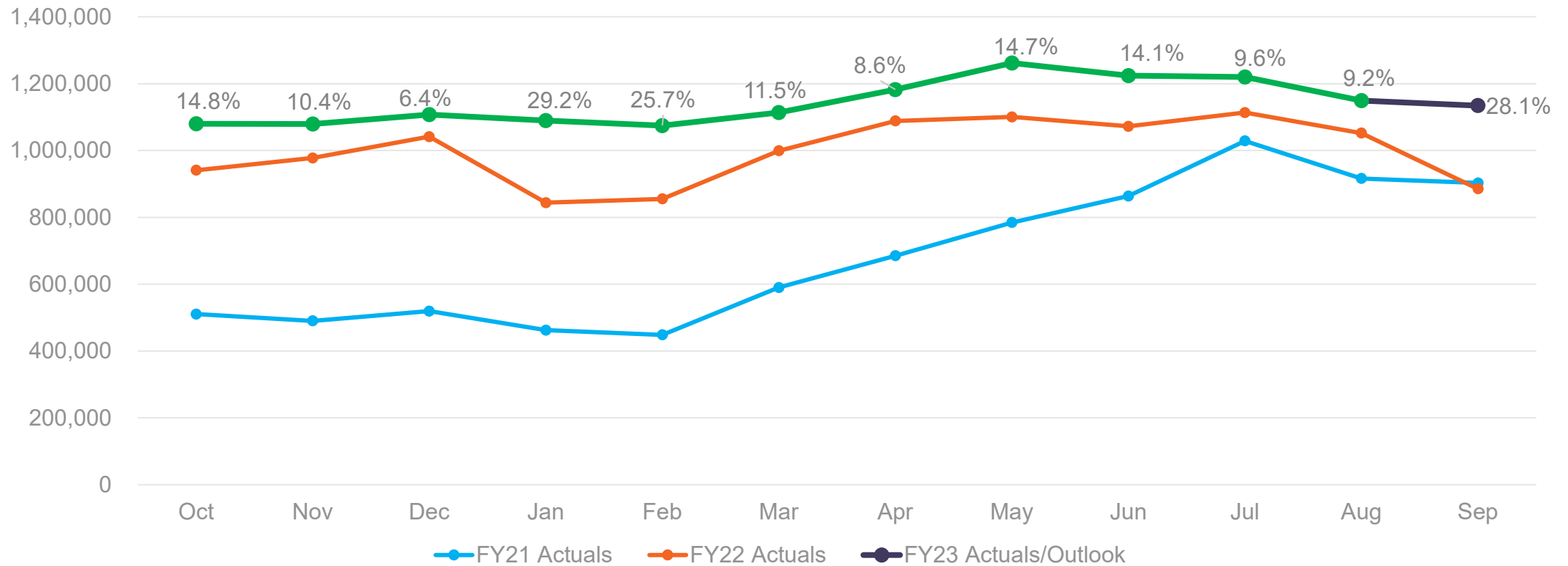
Total Gross Receipts FYTD through August

FY23 gross receipts are expected to be up 20.1% vs FY22, up 80.1% over FY21



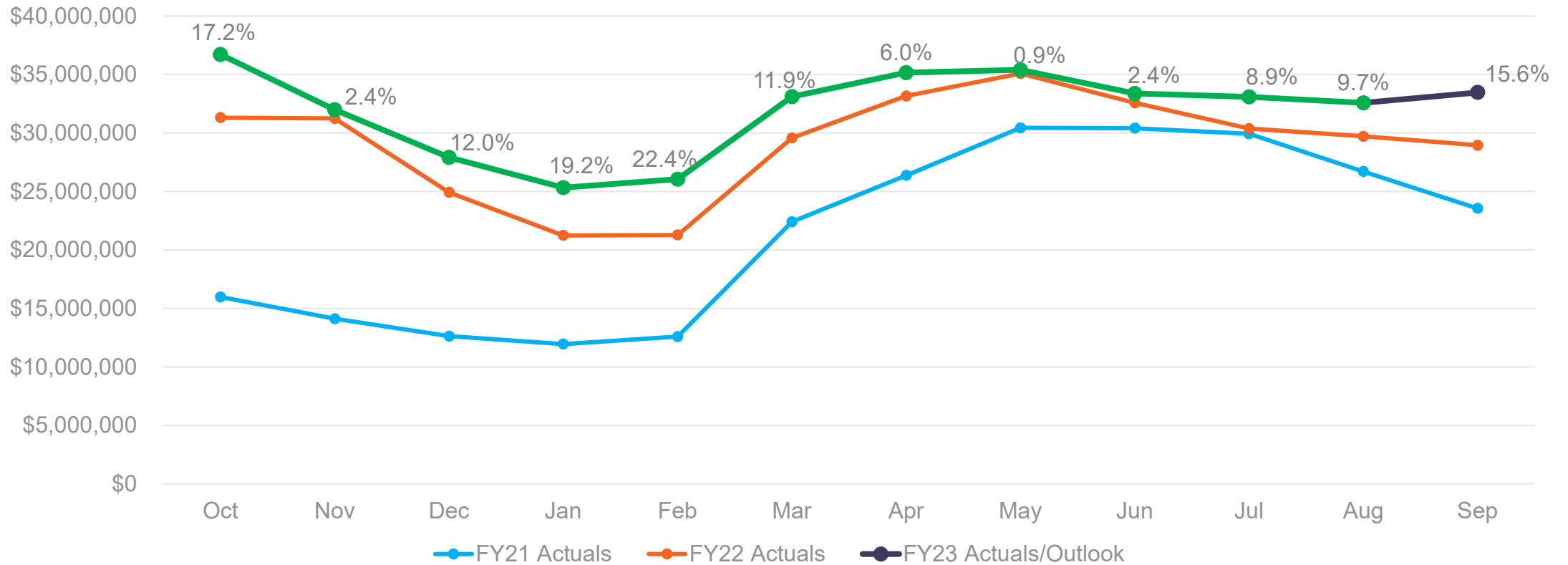
RAC Destination Passenger FYTD through August

FY23 Destination Passengers are projected to be up 14.6% vs FY22, up 67.2% vs FY21



RAC Gross Receipts FYTD through August

FY23 gross receipts are projected to be up 9.9% vs FY22, up 49.5% vs FY21



Upcoming Construction

Tammy Huddleston

Vice President, Design, Code and Construction



International Parkway Modernization(D/B)

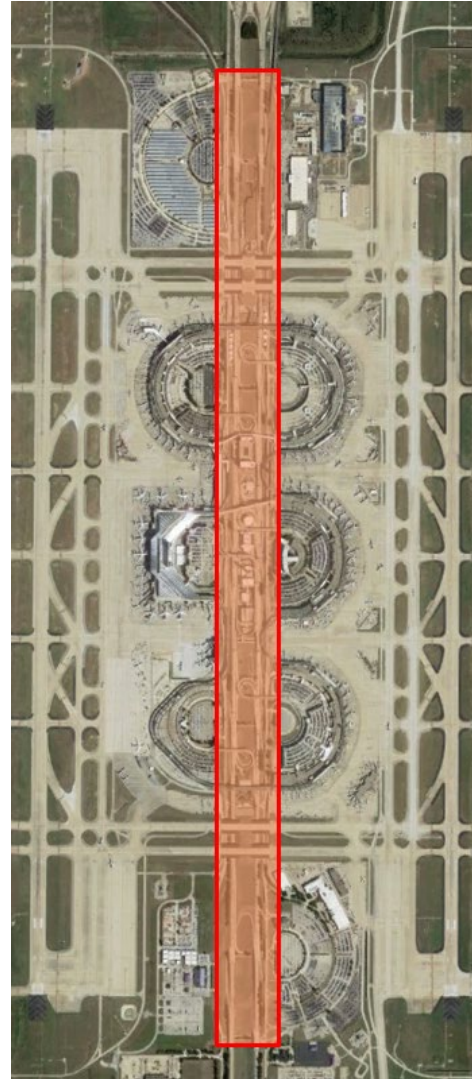
TBD - In Procurement (D/B Contractor)



IP- Right Visualization



High Mast Light Poles



General Location

Project Scope

Removal and replacement of flyover bridges to Terminals A, B, C and E with proposed Right Hand exit ramps. New bridges and associated improvements will be designed to up to date TXDOT/FHWA standards.

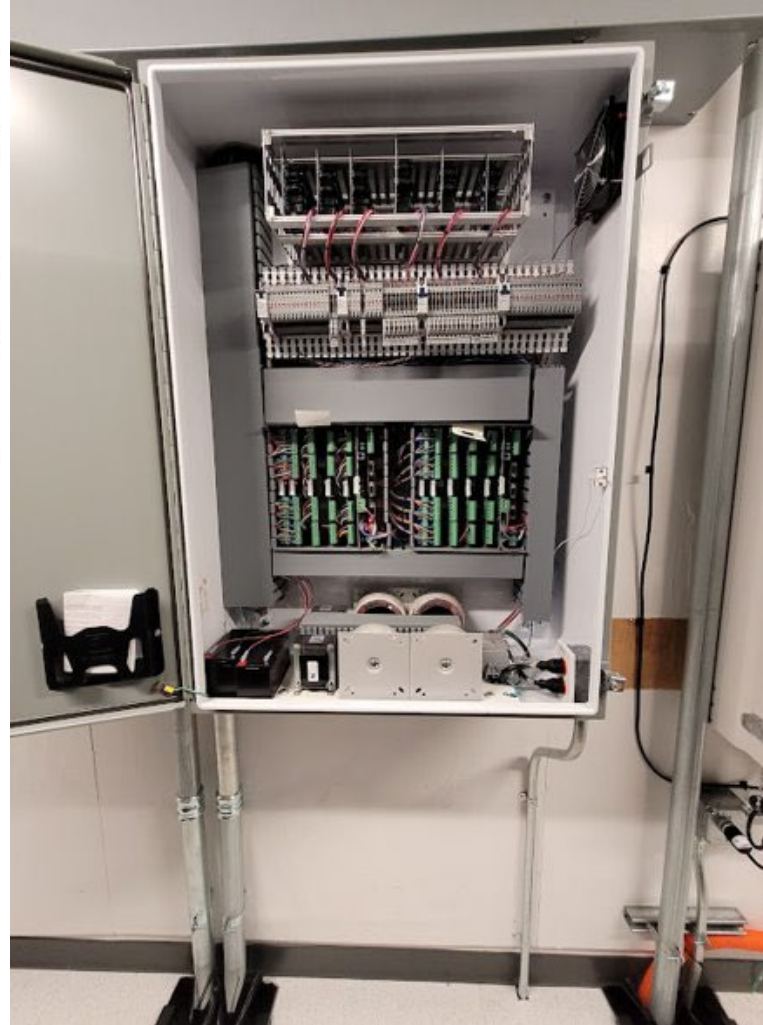
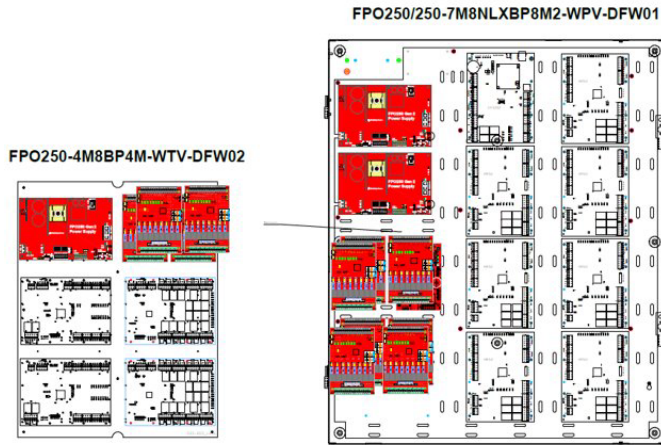
Install 75 High Mast Light Poles along International Parkway with TXDOT Standard HML Poles, with LED lights in efforts to upgrade aged lighting system with sustainable solutions.

Upcoming Milestones

- Construction: May 2024 - September 2026

Replacement of Automated Access Control System (D/B)

Texas Aviation Builders (TAB) (D/B Contractor)



Project Scope

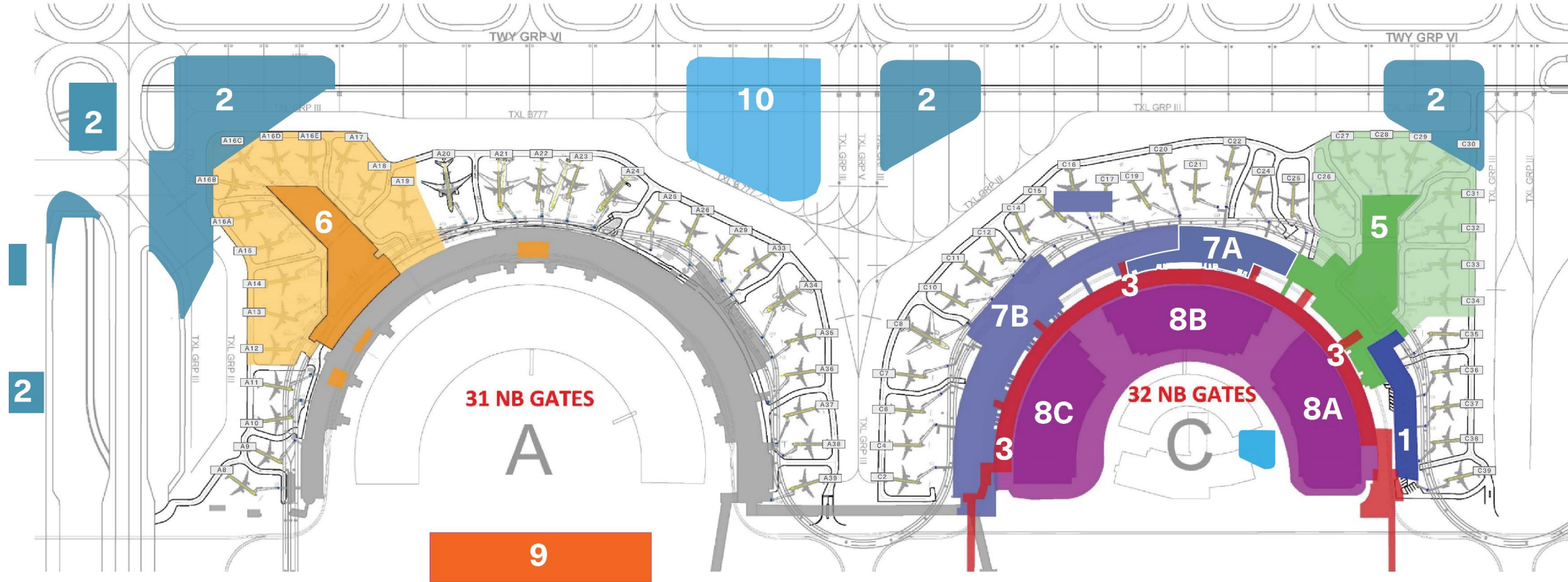
The existing “Picture Perfect” system is near the end of life and this project will replace the system with the new state of the art “Lenel OnGuard S2” System airport-wide. The replacement scope covers 41 Facilities and 50 AOA gates, approximately 1300 security access control points of security doors.

To create an enterprise security environment to protect the Airport’s critical assets in support of Board Policies and the Airport Security Program (ASP). It will also enable the Airport to maintain regulatory compliance as required by the U.S. Department of Homeland Security’s (DHS) Transportation Security Administration (TSA).

Upcoming Milestones

- Design: Jul 2023 – Jun 2024
- Construction: Jun 2024 – Jan 2027

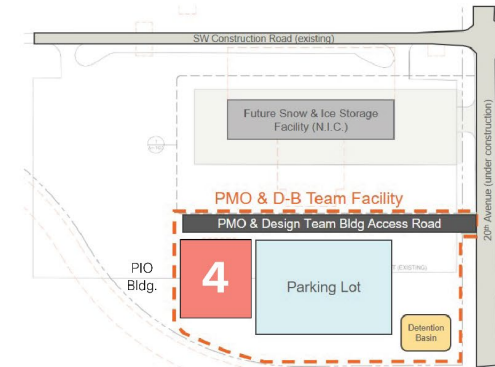
CTA Expansion Program



PROJECT 3
AIRFIELD EFFICIENCY
NOT VISIBLE FOR
TERMINAL B



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

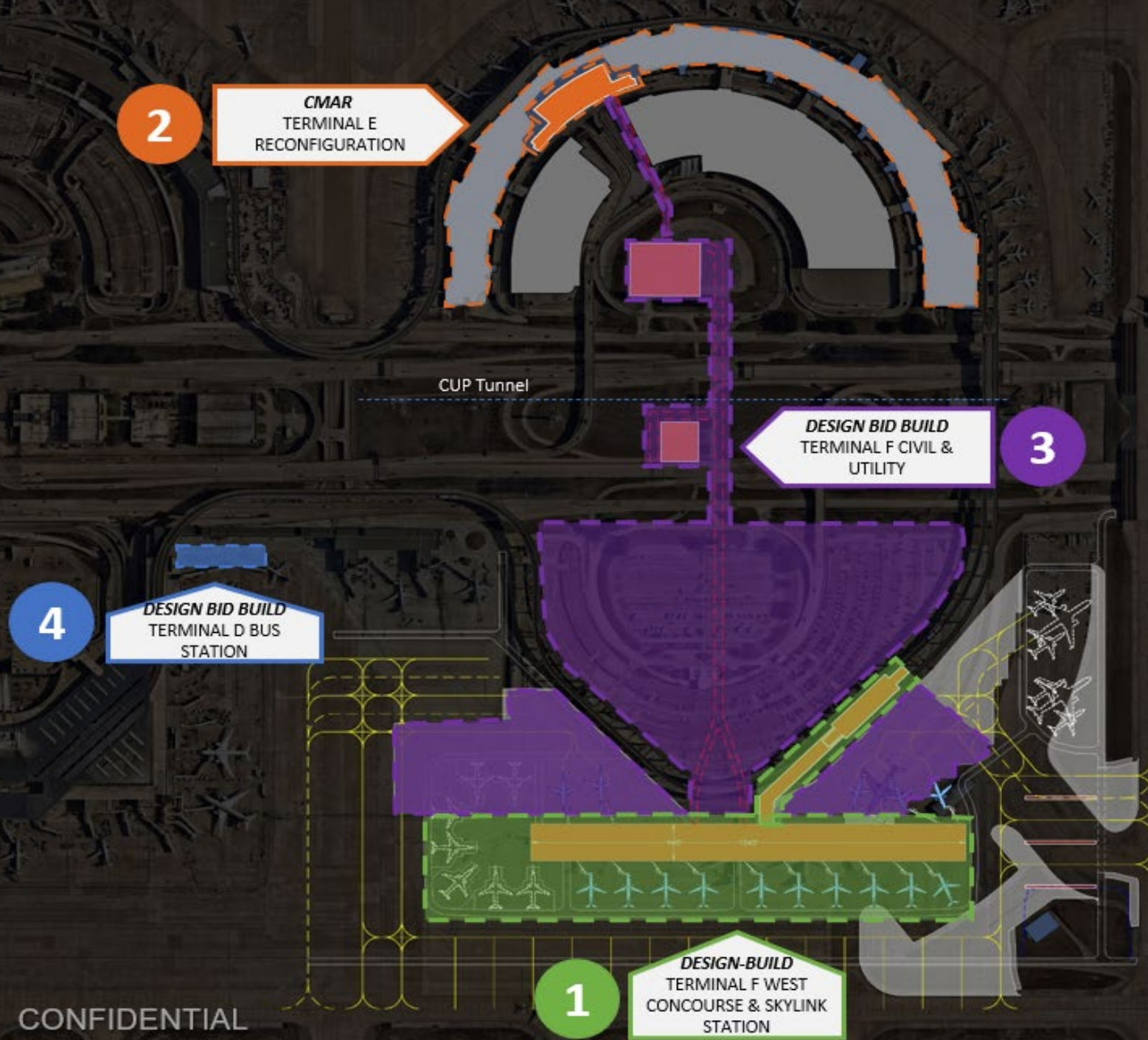


F PROGRAM

LEGEND

- 1 Terminal F West Concourse & Skylink Station
- 2 Terminal E Reconfiguration
- 3 Terminal F Civil & Utility
- 4 Terminal D Bus Station
- 5 DFW Southwest Hardstands Relocation

CONFIDENTIAL



Mystery Shop Projections

Jill McGrew, Concessions Manager



Mystery Shop



- Mystery Shops will begin at the RAC in FY24. Stayed tuned for more information.

FY23 Mystery Shop Overall Results



FY23 Most Improvable Questions

IMPROVABLE QUESTIONS

Showing data for 10/1/22 - 9/30/23. 2478 Evaluations.

Question	Points Lost	Potential Evaluation Score Current Score: 84.00
Associate offered or suggested any additional or complementary items/services/specials	1351	90.47
During your interaction, were you asked if you had a time constraint and/or about your flight time?	367	85.76

Look out for the DFW Way Newsletter

Take advantage of the training video for new associates

DFW WAY

Volume 2

Price Evaluations (Market Baskets) are due April 1

Here is a friendly reminder that your Price Evaluations will be due on **April 1, 2023**.

The concessionaire shall provide an updated merchandise list with current prices and shall provide the Concessions Department names and addresses of local area businesses that the concessionaire believes to be comparable, together with the specific products and services that Concessionaire believes to be comparable.

Please review Standards of Operation in your lease. Commonly this information will be found under Section 6.01 "Products and Pricing."

If an item is found to be out of compliance once the data is reviewed and released, the price can be updated on the report view. If you need any assistance, please contact Eileen Wirz - eileen@cxinc.com

INSIDE THIS ISSUE

Price Evaluations 1

Breaking Through the Language Barrier 2

Spring Break and Peak Travel Season Tips 2

Game Time 3

DFW Way Training 3

Recognition 4

Full instructions to submit:

ID	Location Name	Access Key	Link
1	36000001-01	36000001	https://www.eviewcase.com/shoppers/ExtCollabLogin.php?v=910ajv11nqrb12qmw6tjuf
2	36000001-02	36000002	https://www.eviewcase.com/shoppers/ExtCollabLogin.php?v=910ajv11nqrb12qmw6tjuf
3	36000001-03	36000003	https://www.eviewcase.com/shoppers/ExtCollabLogin.php?v=910ajv11nqrb12qmw6tjuf
4	36000001-04	36000004	https://www.eviewcase.com/shoppers/ExtCollabLogin.php?v=910ajv11nqrb12qmw6tjuf
5	36000001-05	36000005	https://www.eviewcase.com/shoppers/ExtCollabLogin.php?v=910ajv11nqrb12qmw6tjuf
6	36000001-06	36000006	https://www.eviewcase.com/shoppers/ExtCollabLogin.php?v=910ajv11nqrb12qmw6tjuf
7	36000001-07	36000007	https://www.eviewcase.com/shoppers/ExtCollabLogin.php?v=910ajv11nqrb12qmw6tjuf
8	36000001-08	36000008	https://www.eviewcase.com/shoppers/ExtCollabLogin.php?v=910ajv11nqrb12qmw6tjuf
9	36000001-09	36000009	https://www.eviewcase.com/shoppers/ExtCollabLogin.php?v=910ajv11nqrb12qmw6tjuf
10	36000001-10	36000010	https://www.eviewcase.com/shoppers/ExtCollabLogin.php?v=910ajv11nqrb12qmw6tjuf

DFW

Open the applicable link in a browser and enter the Access Code

You can use the same link and Access code until you complete and submit your Audit

Access key:

Submit

Choose Save Evaluation for Later if you want to use the link and access code to add more information later

Choose Complete Evaluation and Submit if you are done entering information and want to submit your results

Spell Check All

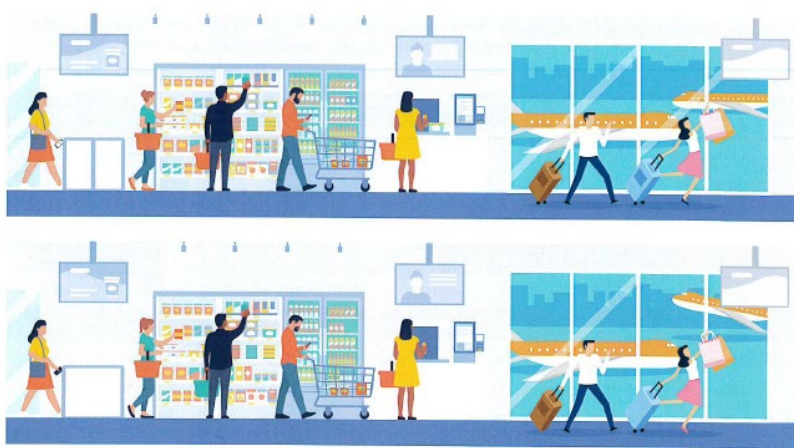
Save Evaluation For Later

Complete Evaluation & Submit

Volume 2

Game Time

How observant are you? Find 25 differences between the 2 terminals.





DFW Way Training

Area of Focus: Attentiveness

Attentiveness standard continues to average in the 50's. Let's work together to increase these scores!

- **Keys to improvement**
 - Suggest items for the customer to add-on to their purchase or highlight any specials
 - Ask customers about time constraints at sit-down dining locations
 - Greet or acknowledge customers when they first enter
- **Link to Training:** Together, we will create exceptional experiences for our customers the DFW Way!
[Link to Training](#)
- New form additions will be applied to the evaluation forms in the Attentiveness section:
 - Was the employee alert and attentive while assisting you?
 - Did they efficiently handle your order/transaction?

Customer Experience Update

Sharon McCloskey

Vice President, Customer Service

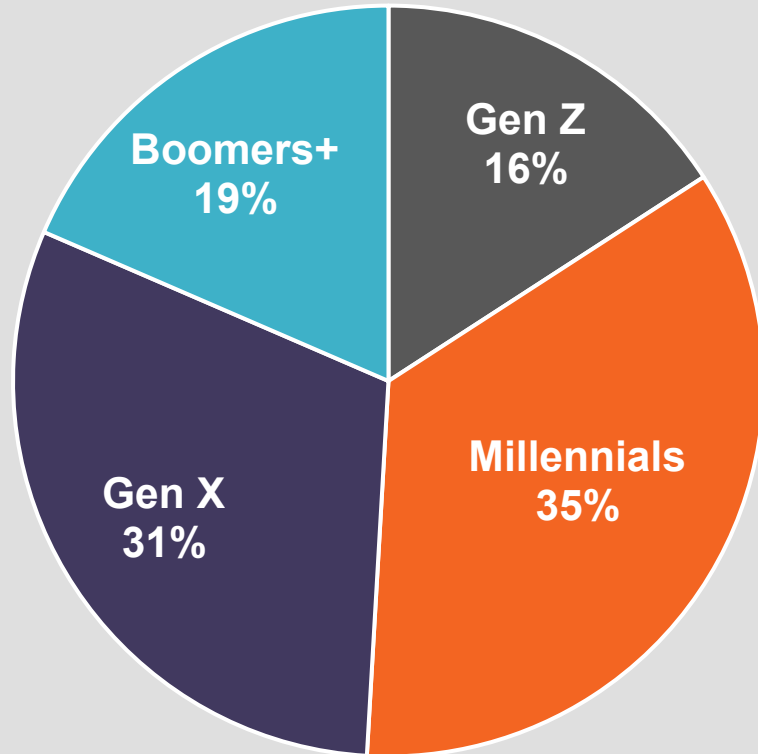




Travelers' Behavioral Science & Concessions Insights

October 2023

Passenger Population by Generation FY23

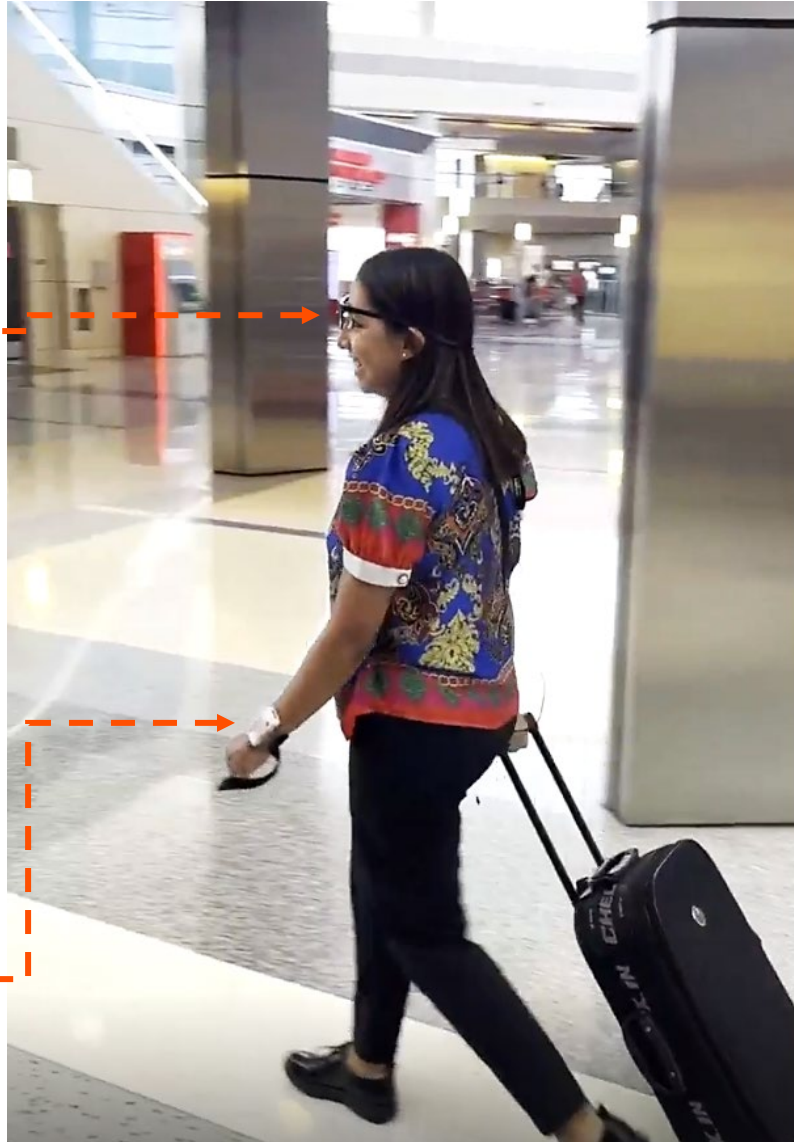


For the first time, Millennials and Gen Z are more than half of the DFW population. These two groups of travelers will continue to grow in the foreseeable future.



According to the American Psychological Association, millennials report increased stress levels compared to other generations. Additionally, they often find it challenging to effectively manage this heightened stress.

Eye tracker glasses

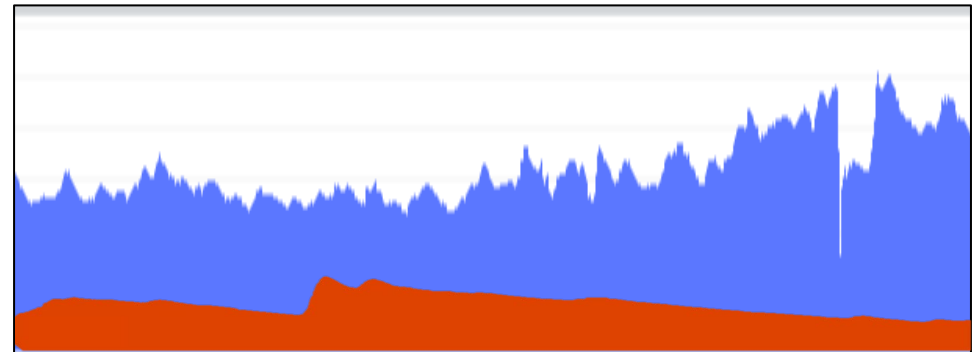


Galvanic Skin Response



Travelers experience higher stress levels during their time at DFW Airport when compared to experiences outside of the Airport.

Average stress levels at DFW Airport



Average stress levels at a typical off-airport convenience store

The more heightened stress they feel, the more likely they will become “gate-locked”.

Getting to their gate is the ultimate stress reliever. We saw consistent decrease in stress and other intense emotions when people start to realize they are getting close to their gate.

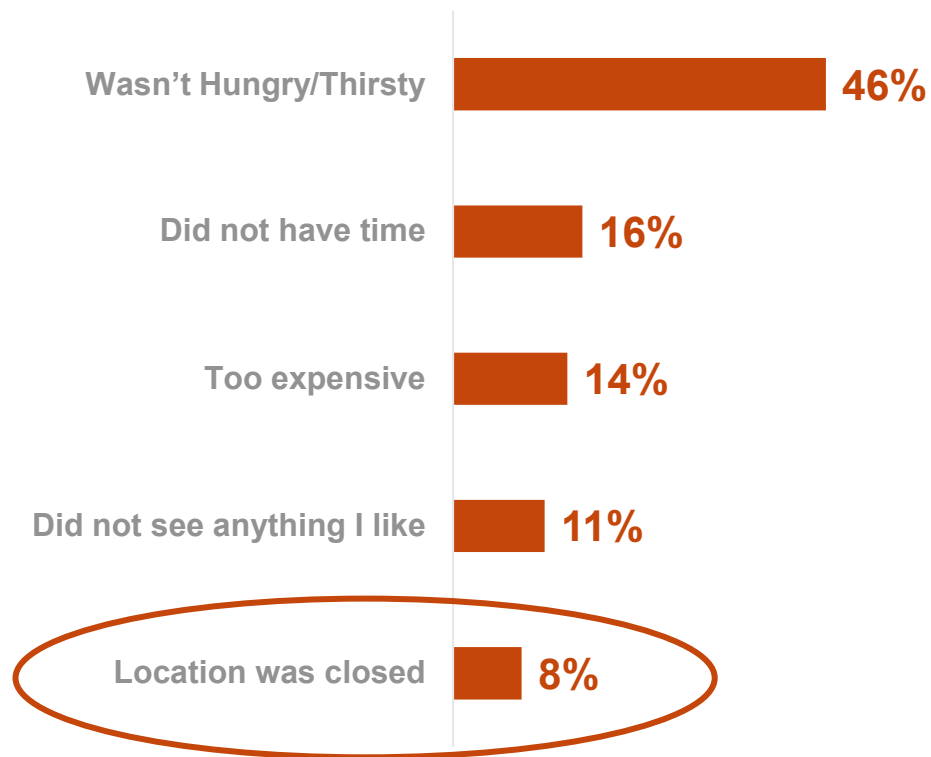
“

“I could probably stop here; it is close to the gate.”

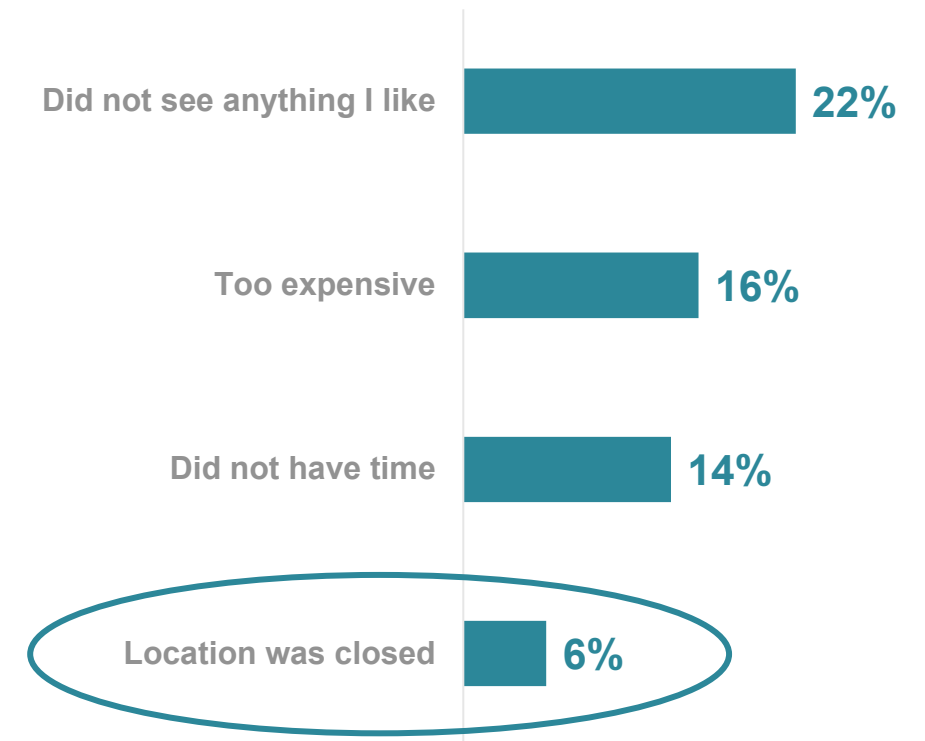


In a survey conducted this year, we asked travelers why they did not make a concessions purchase. Some travelers stated the locations near them were closed.

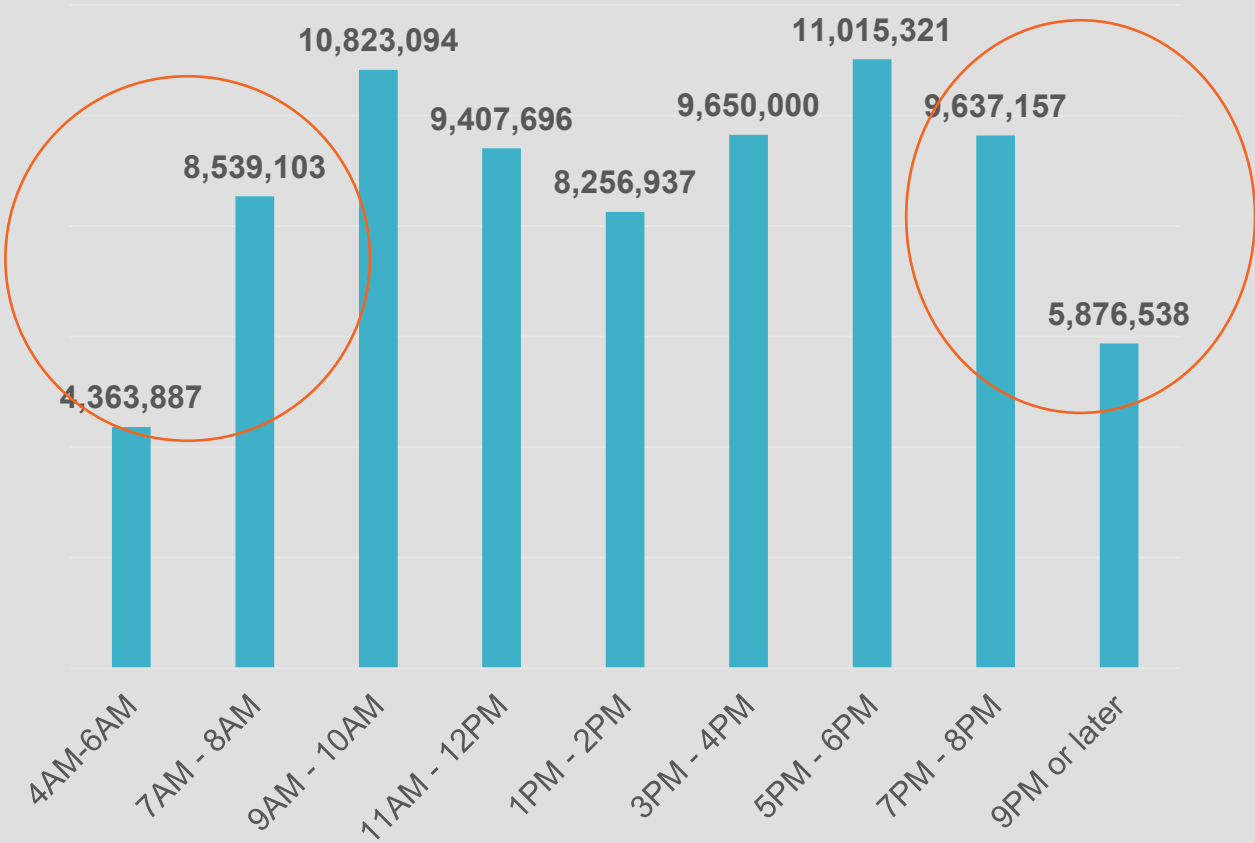
Why did you decide NOT to purchase at/visit a Food & Beverage location?



Why did you deciding not to purchase at/visit a Retail location?

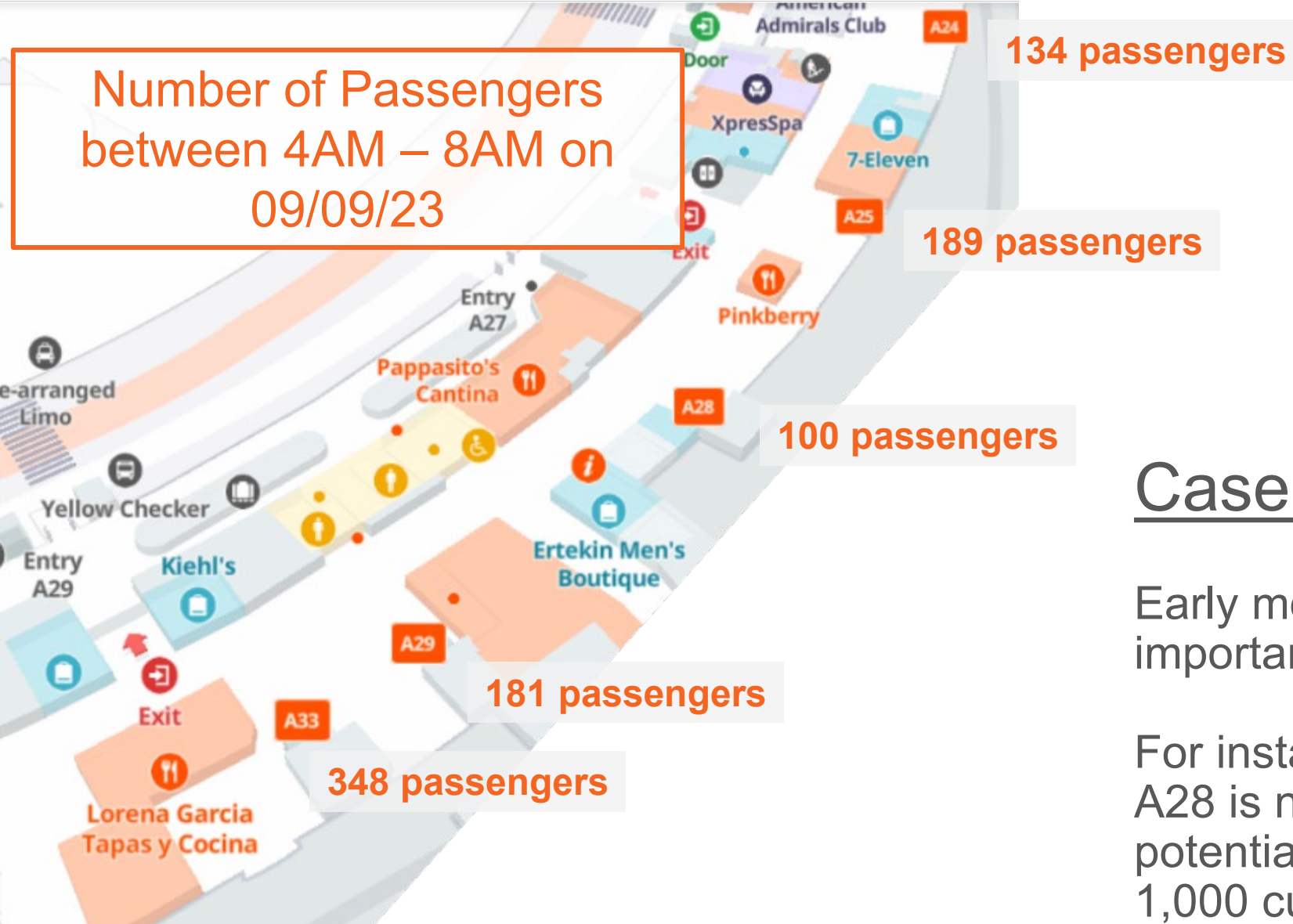


DFW Total Passenger by Time of Day
FY23



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

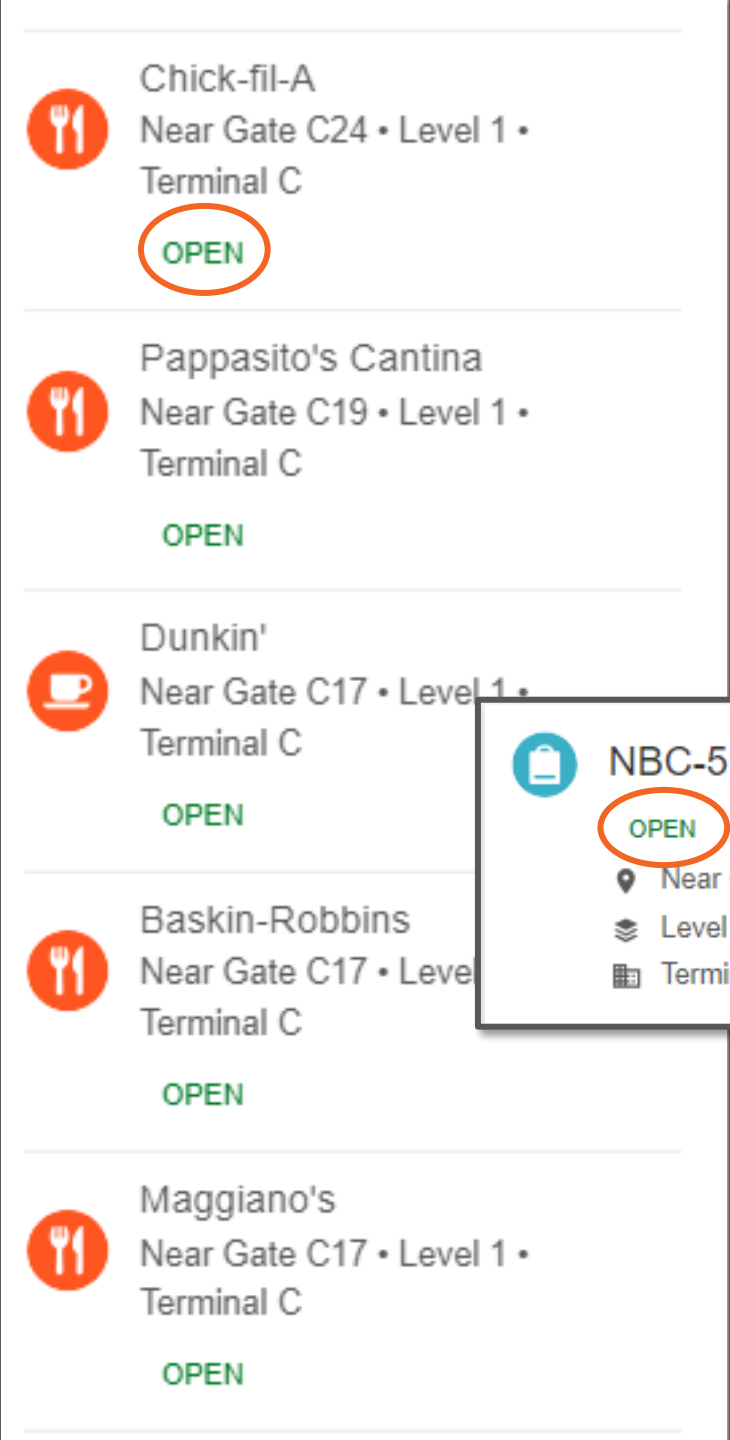
Number of Passengers
between 4AM – 8AM on
09/09/23



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.



To counter stress, it is vital to provide transparency of key passenger 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.



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

Getting Ready for Business

Jennifer Simkins

Assistant Vice President, Concessions



Projected Traffic during “Peak Holiday Travel”

Busiest Travel Day Expected to be Sunday, November 26th

Terminal	Total EPAX Wednesday 11/22	Total EPAX Sunday 11/26
A	25,641	28,002
B	17,527	19,141
C	30,247	33,032
D	21,130	23,076
E	19,575	21,377

November PAX Forecast: **6.8M**

Vs. 2022 **+11.3%**

Thanksgiving Period: **2.9M**

Vs. 2022 **+9.5%**

Enplanement Forecast

Holiday Focus



Maintaining a fully stocked and staffed Grab & Go

An advertisement for DFW Market. The top half has an orange background with the text 'ORDER FOOD. FAST AND EASY.' in white. The bottom half has a blue background with a QR code on the left and the text 'SCAN CODE TO PICK UP FOOD OR HAVE IT DELIVERED TO YOUR GATE.' and 'DFWOrderNow.com' on the right. On the far right, a woman with long dark hair is smiling and eating a bowl of salad. The DFW MARKET logo is in the bottom right corner of the ad.

Promote and utilize DFWOrderNow.com to decrease lines and facilitate the ordering and payment process

Maximizing Business Performance

New Locations Opening Fall / Winter 2023



Plum Market (estimated 10/30/23)
A8



Lego (estimated 11/15/23)
D20



Sunglasses (estimated 11/15/23)
D20



Toys R Us (estimated 11/15/23)
A28



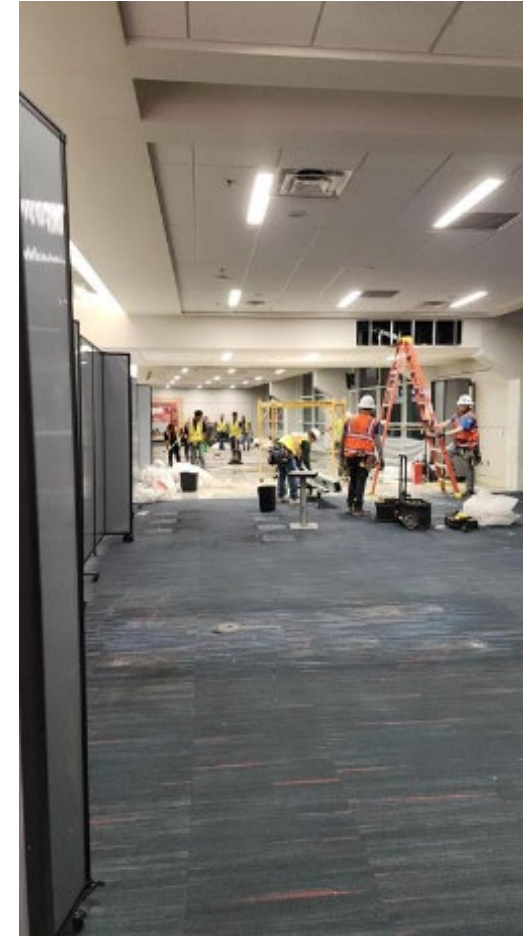
The Bridge (estimated 12/15/23)
A9



Ampersand (estimated 12/22/23)
C36

Construction Update - B Mainline

Planning to Reopen Gates in Mid November





Coca-Cola Promos

November 23rd - December 31st

- Buy 2, Get a Polar Bear Ornament
- Selfie with Santa



Live Music in Terminals

Dates: Fridays in December

Location: All Terminals

Holiday K-9 Crew Volunteer Parade

Tentative Date: Wednesday, December 22nd

Time: 12:00 p.m. to 2:00 p.m.

Location: Terminal D



Military Holiday Exodus

Background:

About 4,000+ Army and Airforce recruits complete their Basic Training from nearby bases and receive 2 weeks leave to visit family.

They arrive on busses and enter DFW Gates D30 and E18 around Midnight to wait for their flight the next day.

Some concessionaires remain open extra hours and offer specials and a fun atmosphere.

Dates:

- Friday night, Dec 22 (Sheppard Air Force Base)
- Other dates coming soon



#OneDFW Employee Pre-Holiday Surprise and Delight Event

Event at Lower-Level Terminal curbside locations to spread holiday cheer to Airport employees before the official holiday season starts

- Distribute hot beverages (hot cocoa, tea, coffee, cider) and #OneDFW ornaments
- Planned for early November before the rush of the holiday season begins



Closing

Ken Buchanan

Executive Vice President, Revenue Management

Q & A

Thank You