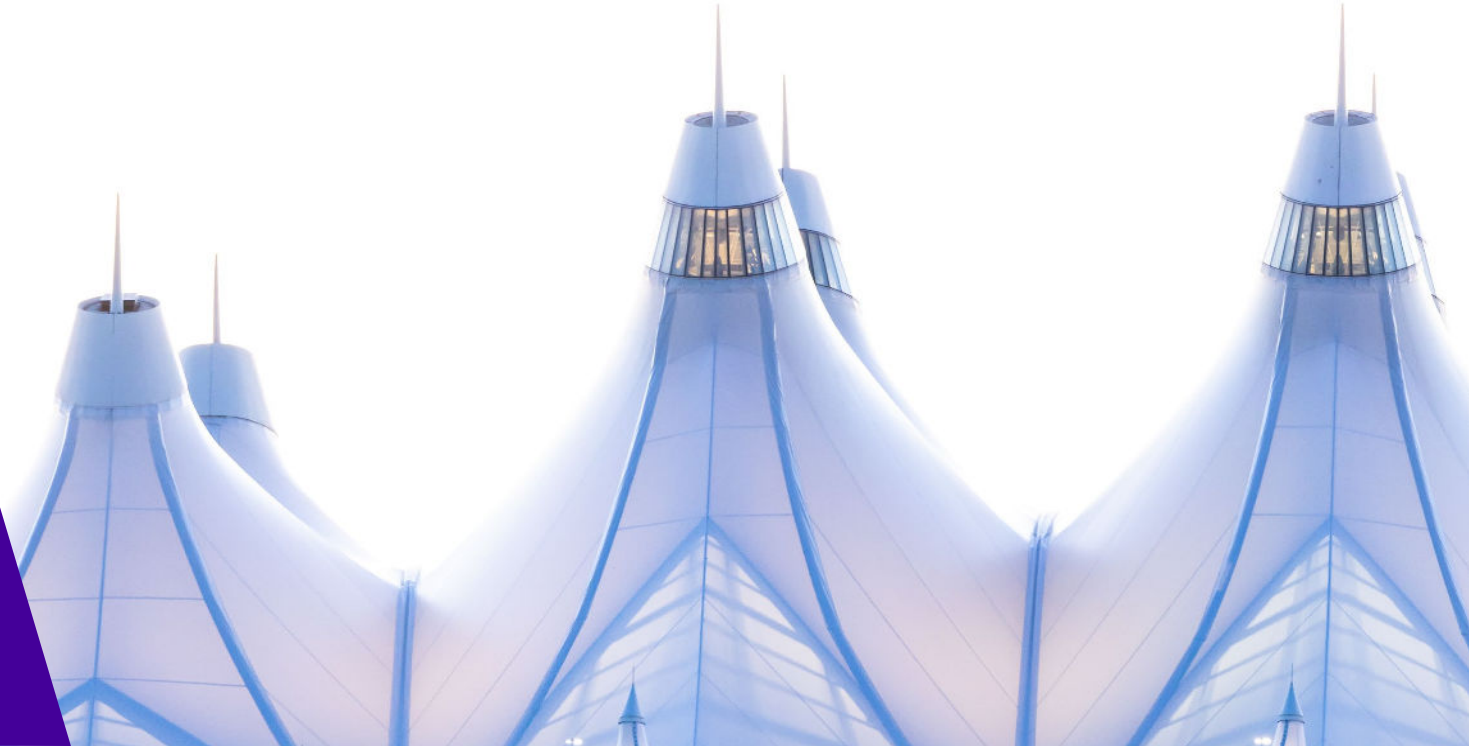




DENVER INTERNATIONAL AIRPORT

DEN CONCESSIONS

Commercial Master Plan




AUGUST 2024

DEN OVERVIEW



- Sixth-busiest airport in the world based on 2023 annual passenger traffic
- Second-largest airport in the world – 53 square miles
- Six runways with room to expand to 12 runways
- Total number of gates: 148 narrow-body contact gates and 9 apron-load positions
- Major hub for three large airlines: United, Southwest, and Frontier



DEN BY THE NUMBERS



25

Airlines

200+

Nonstop destinations

25+

International destinations serving

16

Countries



Roughly
1,200 companies

working at DEN

Approximately

40,000+ employees



Colorado's largest economic engine

\$36.4 billion annually

2/22/24

3RD-BUSIEST AIRPORT IN NORTH AMERICA

6TH-BUSIEST AIRPORT IN THE WORLD (ACI CY 2023)

PASSENGERS

69 million

2019

33.7 million

2020

58.8 million

2021

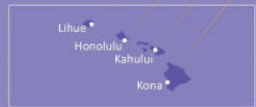
69.3 million

2022

77.8 million

2023

DEN 2024 Nonstop Route Network



DEN 2024 Scheduled Passenger Carriers

U.S. Carriers

Alaska

allegiant

American Airlines

Breeze

DELTA

DenverAir
CONNECTION

FRONTIER

jetBlue

SOUTHERN AIRWAYS
EXPRESS

Southwest

sun country
airlines

UNITED

International Carriers

Aer Lingus

AEROMEXICO

AIR CANADA

AIRFRANCE

BRITISH AIRWAYS

Cayman Airways

CopaAirlines

edelweiss

ICELANDAIR

Lufthansa

TURKISH AIRLINES

viva

volaris

WESTJET



100 MILLION ANNUAL PASSENGERS

- SUSTAINABILITY & RESILIENCY • EQUITY, DIVERSITY, INCLUSION & ACCESSIBILITY
- OPERATIONAL EXCELLENCE • ENHANCING THE CUSTOMER EXPERIENCE

PILLAR 1



EMPOWERING OUR PEOPLE

- Develop Workforce Leadership Strategy
- Establish Center of Equity and Excellence in Aviation
- Enable Employee Innovation

PILLAR 2



GROWING OUR INFRASTRUCTURE

- Complete Major Infrastructure Projects
- Update Master Plan
- Develop Infrastructure Plan for DEN Real Estate

PILLAR 3



MAINTAINING WHAT WE HAVE

- Upgrade and Improve the Existing Facility
- Update Strategic Asset Management Plan
- Implement Customer-Focused Initiatives
- Develop Greenhouse Gas Emissions Reduction Plan

PILLAR 4



EXPANDING OUR GLOBAL CONNECTIONS

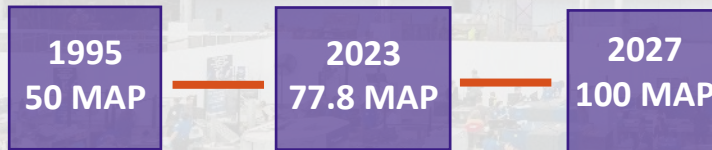
- Identify Air Cargo Opportunities
- Expand to Disconnected Destinations (e.g. Africa)
- Grow our Domestic Network

VISION 100 AND OPERATION 2045

Phase I



DEN's strategic plan to effectively serve 100 million passengers



2022
69.3M

2032
100M*

*FAA approved projection

Phase II



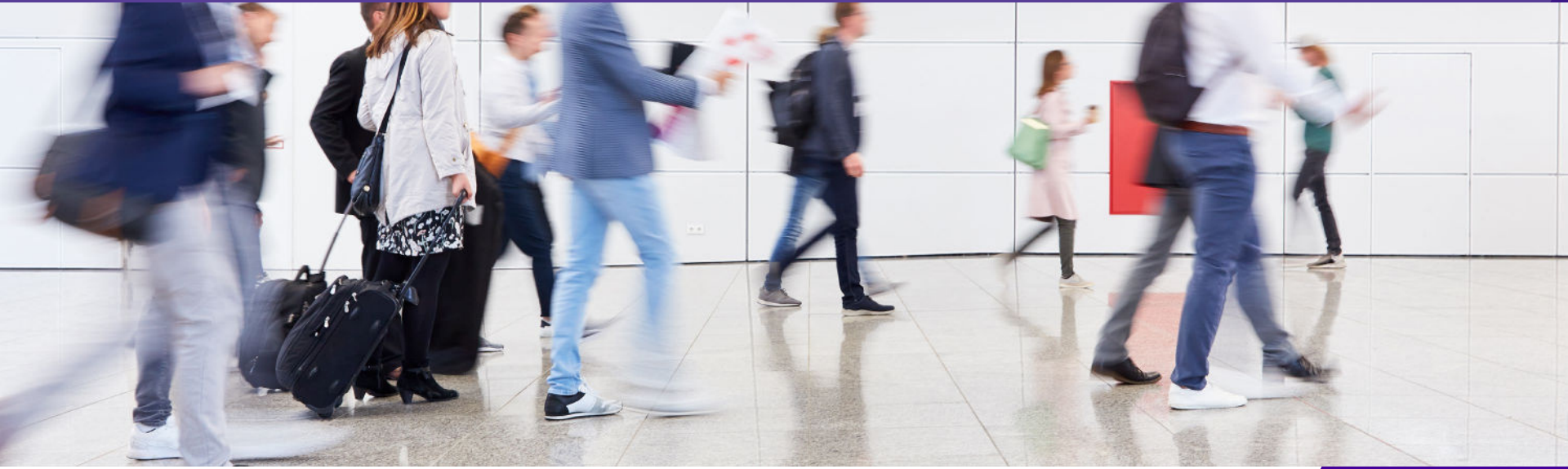
DEN will turn 50 years old requiring an even greater emphasis on maintenance and expanded infrastructure to serve 120+ million passengers



2045
120+M

IMPACT OF GROWTH

- Crowding, long lines and lack of options hurting revenue performance
- Passenger movement becoming more difficult
- Concessions are undersized for passenger volumes
- Decrease in customer satisfaction when our guests cannot get their needs met



OUR SOLUTION: MASTER PLAN

A road map to efficiently meet airport growth
and serve 100 million passengers

Two major Master Plan functions

- Adding square footage and transforming layout of current space
- Outlines core commercial planning principles used to redevelop the entire program

Vision 100

- Almost two years of development for future strategy and master plan
- The needs of small, local, and ACDBE businesses should be reflected in DEN's commercial plans



Investing in our future

GATE EXPANSION



GREAT HALL



CONCESSIONS MASTER PLAN



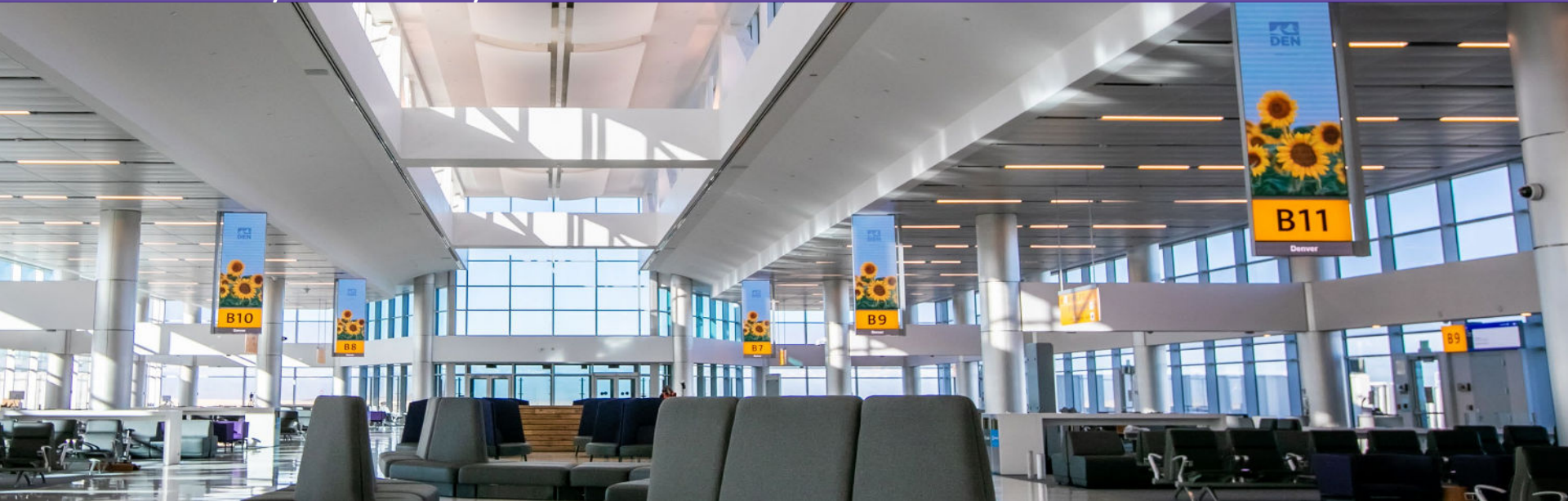
CENTER OF EQUITY AND EXCELLENCE IN AVIATION (CEEA)



GATE EXPANSION



- \$1.5 billion program added 39 gates, increasing gate capacity by 30%
- Outdoor patios at the end of the concourses, new restrooms, new signage, conveyances and systems



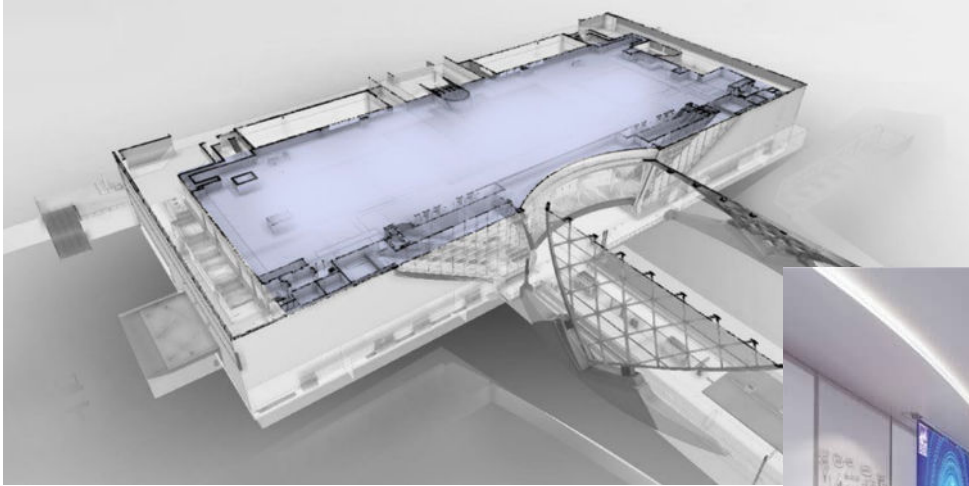
GREAT HALL PROJECT

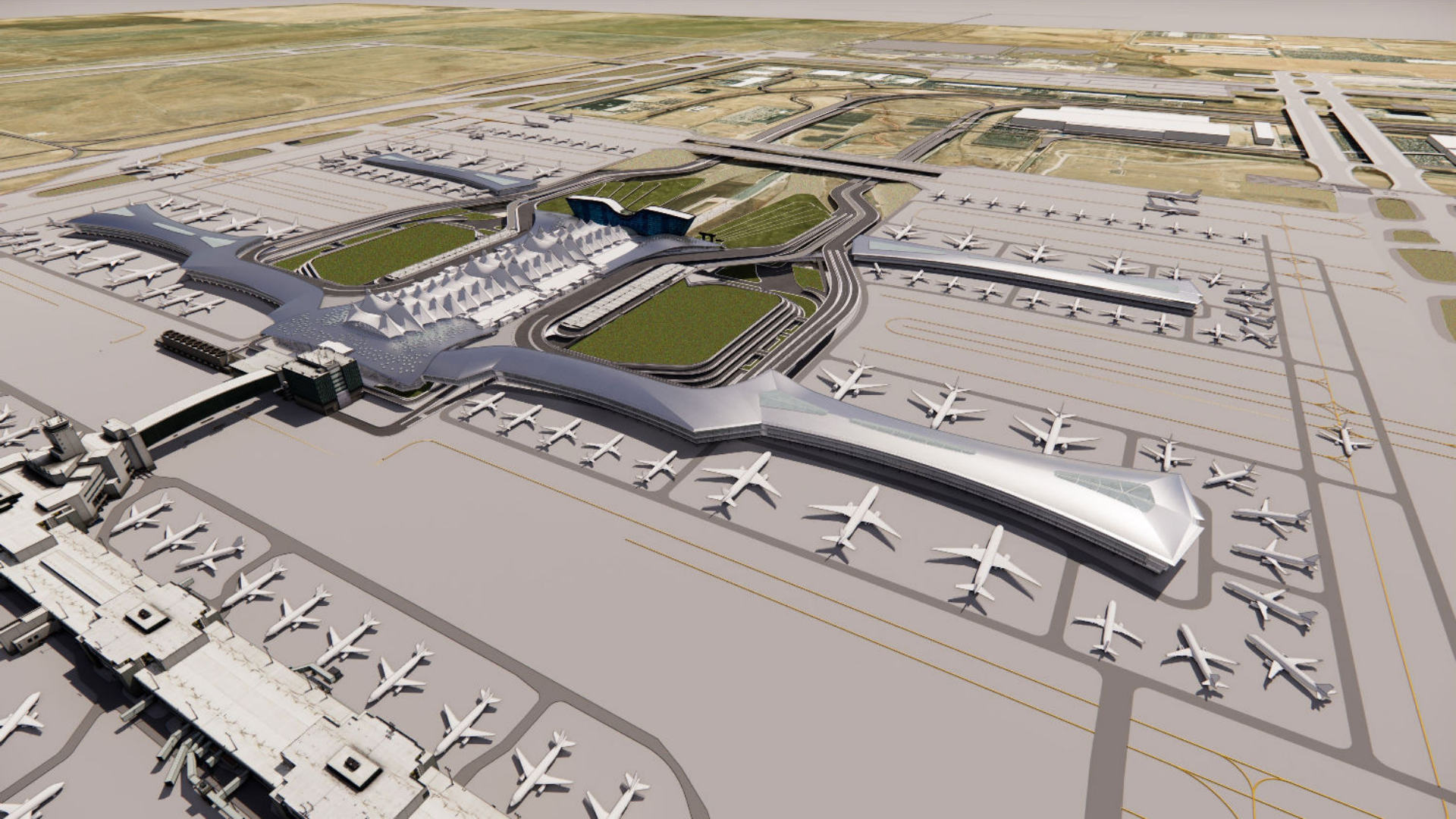


- Modernized ticket lobbies with automated self bag drops
- Four new and upgraded restrooms, escalators and elevators, HVAC
- More spacious and efficient passenger flow



CENTER OF EQUITY AND EXCELLENCE IN AVIATION





CONCESSIONS: 2023

185+

Shopping and dining options

228k SF

Concession space

\$596M

Gross sales in 2023

\$15.29

SPE for 2023



CONCESSIONS 2024 YTD THRU APRIL



\$15.85

SPE

+ 3.52% YOY



\$ 199M

GROSS SALES

+11.45% YOY



12.55M

Departing Passengers

+7.66% YOY

COMMERCIAL PRINCIPLES

DRIVERS OF EXPERIENCE AND COMMERCIAL PERFORMANCE



Flow, dwell, journey

Manage flow, orientation, and dwell



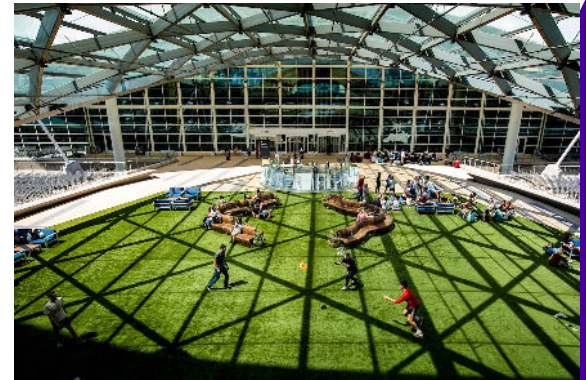
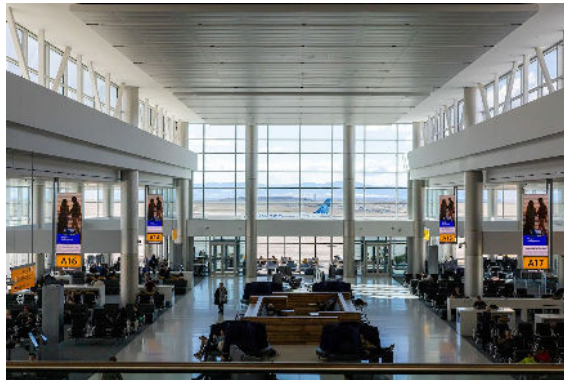
Layout & design

Configure the space to optimize value potential



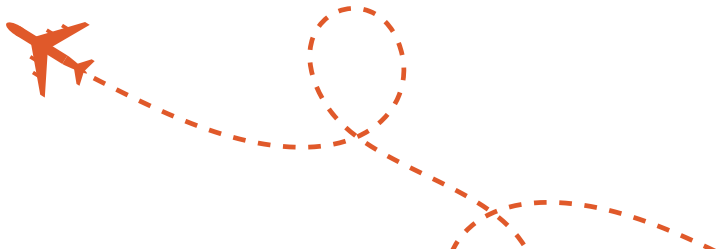
Environment and sense of place

Create a unique DEN experience



COMMON CONCOURSE ATTRIBUTES

- Improving sightlines
- Supporting operational requirements
- Creating precincts and adjacencies
- Promoting more flexible use of space
- Adding seating in center core
- Ensuring sufficient commercial capacity for future customer volumes
- Matching commercial layout to customer needs



OPENING THIS YEAR





DEN is Unique



ENHANCING EQUITY IN CONCESSIONS

- The airport has undertaken significant strides to bolster small and minority businesses
 - Implemented a cap on RFP submittal and design size to promote a level playing field
 - Created new Small Business Enterprise Concessions (SBEC) opportunities to limit the competition pool to same-sized companies
 - Added language to competitive solicitations that includes detailed information about DEN's Equity, Diversity and Inclusion (EDI) requirements, including a new City Values Statement
 - A required Equity, Diversity and Inclusivity Plan submission as part of proposals that will be scored and factored into each proposal's final assessment



A NEW INCENTIVE PROGRAM

Excellence In Service (EIS)

Purpose:

- In alignment with Vision 100 and City values, the DEN Excellence in Service program is designed to motivate and reward its best-in-class concessions
- An incentive in the form of a 3-year contract term extension in alignment with Vision 100 and the City values.

Goal:

- DEN wishes to award the top-performing concessionaires and have high operating expectations throughout the life of the term. When our partners exceed in the core values of Vision 100, we create a more equitable environment while increasing passenger satisfaction and revenue.

EXCELLENCE IN SERVICE (EIS)

Scoring Framework

- Customer Service - *(Vision 100, Enhancing Customer Service)*
- Equity, Diversity, and Inclusion - *(Vision 100, Equity, Diversity & Inclusion)*
- ACDBE Compliance- *(Vision 100, Equity, Diversity & Inclusion)*
- Sustainability - *(Vision 100, Sustainability & Resiliency)*

CENTER OF EQUITY AND EXCELLENCE IN AVIATION





DEN PERKS REWARD PROGRAM

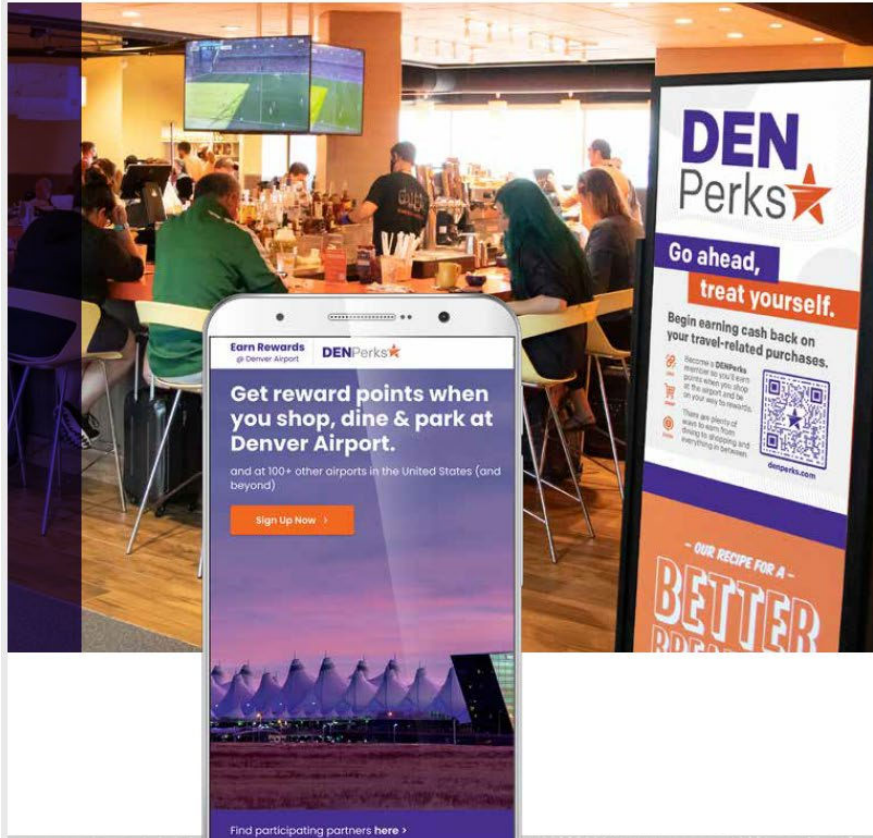
**YOU GET PAID TO
EAT AND DRINK.**

COULD THERE BE A BETTER
JOB IN THE WORLD?

Welcome to the DENPerks Rewards Campaign.



DEN PERKS REWARD PROGRAM



1

Travelers **SIGN UP FOR FREE** at DENPerks.com

2

They start **ACCUMULATING POINTS** by making purchases at the airport.

3

They turn those points into **CASH AND GIFT CARDS.**

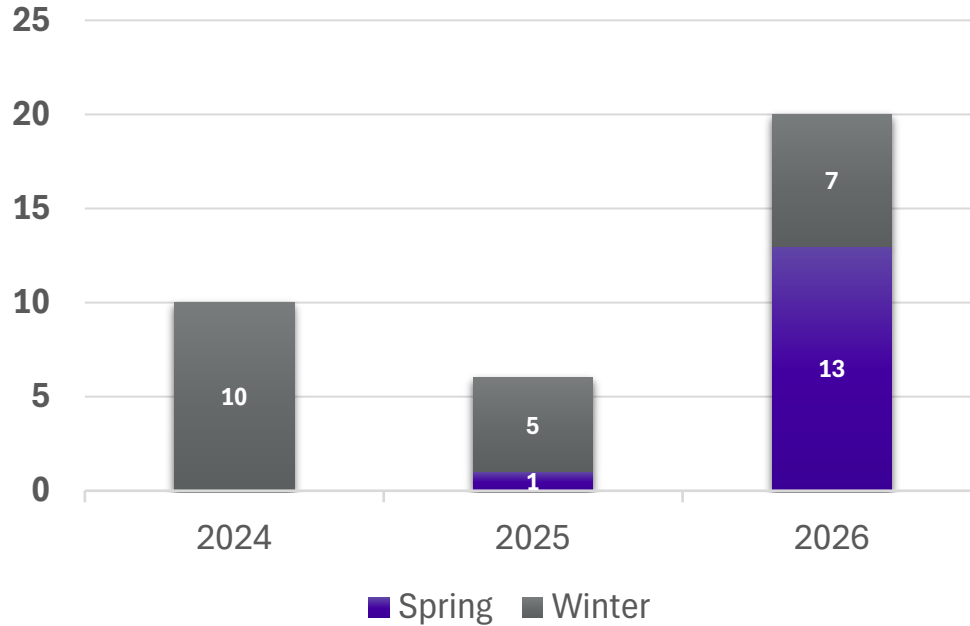
4

The more they spend, **THE MORE THEY EARN.**

5

Travelers gain **SPECIAL PROMOTIONS AND OFFERS.**

UPCOMING CONCESSION RFP LOCATIONS



2024 WINTER RFP LOCATIONS



F&B / RETAIL

Casual Dining w/ Bar, C Mezz - - - - 5802 sq. ft.

Casual Dining w/ Bar, C Mezz - - - - 5362 sq. ft.

QSR, ACON - - - - 1417 sq. ft.

QSR w/ Alcohol - - - - 3341 sq. ft.

Specialty Retail, ACON - - - - 3746 sq. ft.

Specialty Retail, BCON - - - - 1682 sq. ft.

PASSENGER SERVICES

ATMS

Airport Mailing Service

Non-Traditional Vending

Vending

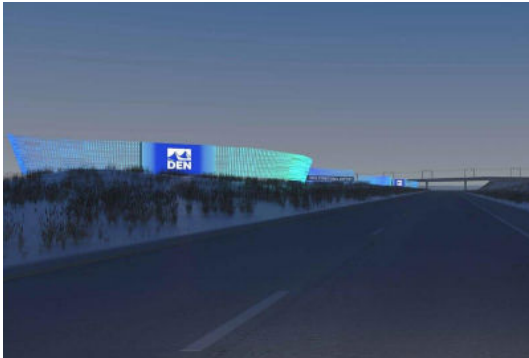


SPRING:

WINTER:

AIRPORT WIDE ADVERTISING

- Specialty Retail, BCON - - - - 2699 sq. ft.
- F&B Marketplace, C West - - - - 6000 sq. ft.
- F&B Marketplace, C West - - - - 6000 sq. ft.
- Travel Convenience, C West - - - - 1000 sq. ft.
- Travel Convenience, C West - - - - 1000 sq. ft.



2026 RFP LOCATIONS



SPRING:

WINTER:

Café, Great Hall - - - - 1720 sq. ft.
Casual Dining w/ Bar, Great Hall - - - - 1750 sq. ft.
Casual Dining w/ Bar, Great Hall - - - - 1680 sq. ft.
F&B Marketplace, Great Hall - - - - 5300 sq. ft.
Luggage Service - - - - 1000 sq. ft.
Banking Services - - - - 584 sq. ft.
QSR Burger BCON - - - - 2312 sq. ft.
QSR Burger, CCON - - - - 1041 sq. ft.
QSR Pizza, CCON - - - - 1115 sq. ft.
QSR, Great Hall - - - - 1275 sq. ft.
QSR , Great Hall - - - - 1750 sq. ft.
Travel Convenience, Great Hall - - - - 342 sq. ft.
Travel Convenience, Great Hall - - - - 1070 sq. ft.

QSR, ACON - - - - 1527 sq. ft.
QSR, BCON - - - - 958 sq. ft.
QSR, BCON - - - - 2339 sq. ft.
Coffee Kiosk, BCON - - - - 224 sq. ft.
Coffee Kiosk, BCON - - - - 373 sq. ft.
Specialty Retail, ACON - - - - 2316 sq. ft.
Specialty Retail, CCON - - - - 2932 sq. ft.

BUSINESS DEVELOPMENT TRAINING ACADEMY



The Business Development Training Academy's (BDTA) primary goals are to:

- **Create** - The training academy in a phased approach that is inclusive of planning with small businesses, industry partners, project managers, and community stakeholders.
- **Educate** - Underutilized small businesses on how to succeed in attaining work at DEN by understanding the intricate steps of opportunity discovery, networking with prime contractors and concessionaires, and policies and regulations that must be followed while working at the airport.
- **Cultivate** - An environment for small businesses to scale up efficiently and effectively in knowledge, skills, and DEN experience so that it can be shared with other underutilized small businesses.

HOW TO DO BUSINESS AT DEN





Taking Flight at DEN

REGISTER TODAY

Every 2nd Thursday at 1 pm, Virtual

- January 11th
- February 8th
- March 14th
- April 11th
- May 9th
- June 13th
- July 11th
- August 8th
- September 12th
- October 10th
- November 14th
- December 12th



Meet with Prime Concessionaires and pitch your product to have it featured in a DEN Concession store.

September 24th
Renaissance Hotel
9-11 am

Signup on our mailing list to receive more information
<https://lp.constantcontactpages.com/sl/QFiulds>



UPCOMING OPPORTUNITIES



Upcoming Opportunities

[See Current Opportunities on BidNet](#)

Search:

Project	Description	Anticipated Advertisement Date	Estimated Project Value	Date Announced Here
Currency Exchange Package	<p>Denver International Airport (DEN) Will Be Conducting A Request For Proposal (RFP) For Competitive Selection Process For A Currency Exchange Concessionaire To Develop, Build, Operate, And Manage Four (4) High Quality Customer Service Concessions At DEN For Use By Airport Passengers And Airport Employees. Requested Services Offered May Include Currency Exchange, Travelers Insurance, Check Cashing, Wire Transfers, Fax, Copy, Notary, International Sim Cards And Postage Services. The Four (4) Concession Locations Total Approximately 542.7 Square Feet.</p> <p>Locations Include Jeppesen Terminal – Level 5 (308.7 Square Feet), Concourse A Center Core West (78 Square Feet), Concourse B Center Core West (78 Square Feet) And Concourse C Center Core West (78 Square Feet). Successful Proposer Will Be Required To Demolish The Existing Location On Concourse A And Responsible For The Design And Build Out Of Three (3) New 78 Square Feet Locations For Concourses A, B, And C. The Successful Proposer Will Also Finish Out From A DEN</p>	May 2024	Revenue	4/18/2024



- Weekly Newsletters
- Event Email Notifications
- Training Email Invitations

Signup on our mailing list to receive more information

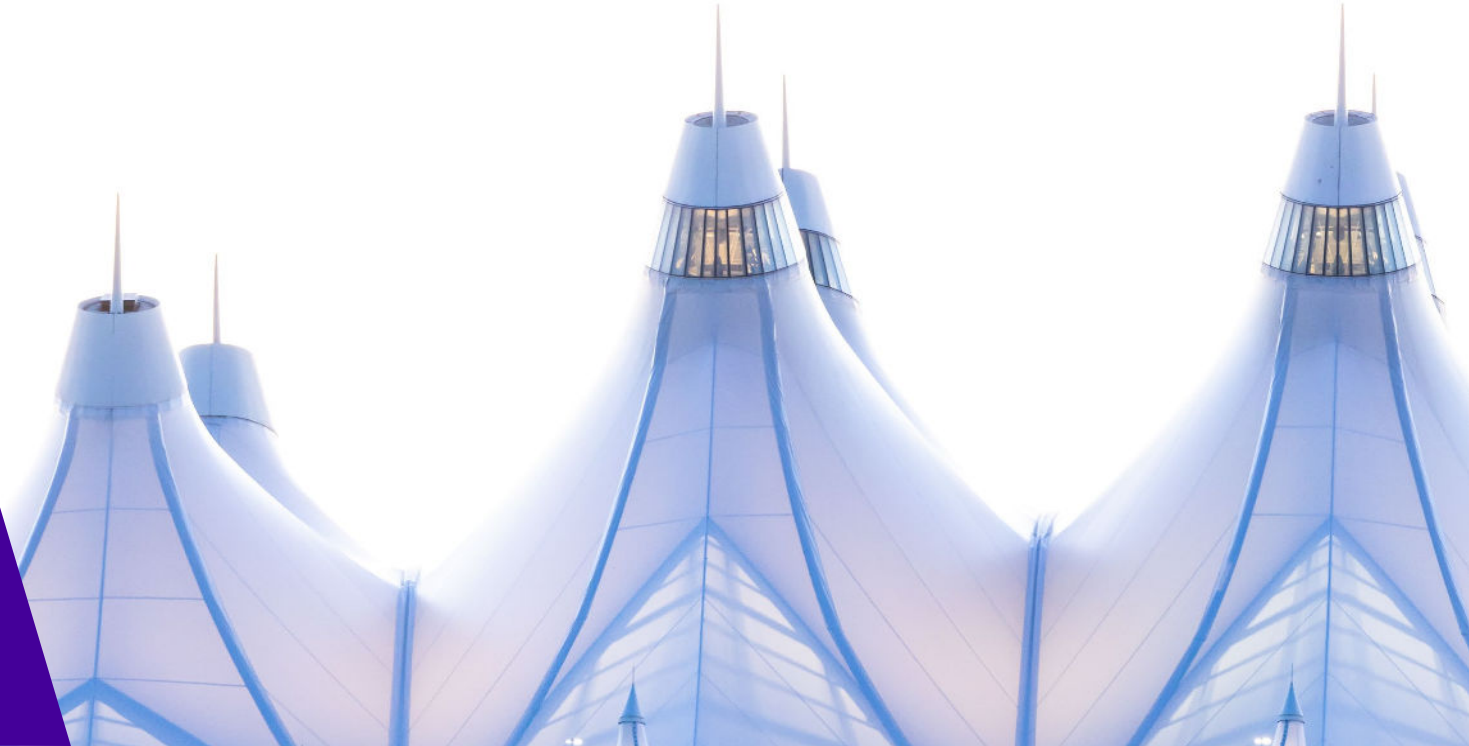
<https://lp.constantcontactpages.com/sl/QFiulds>





DENVER INTERNATIONAL AIRPORT

THANK YOU!



AUGUST 2024