

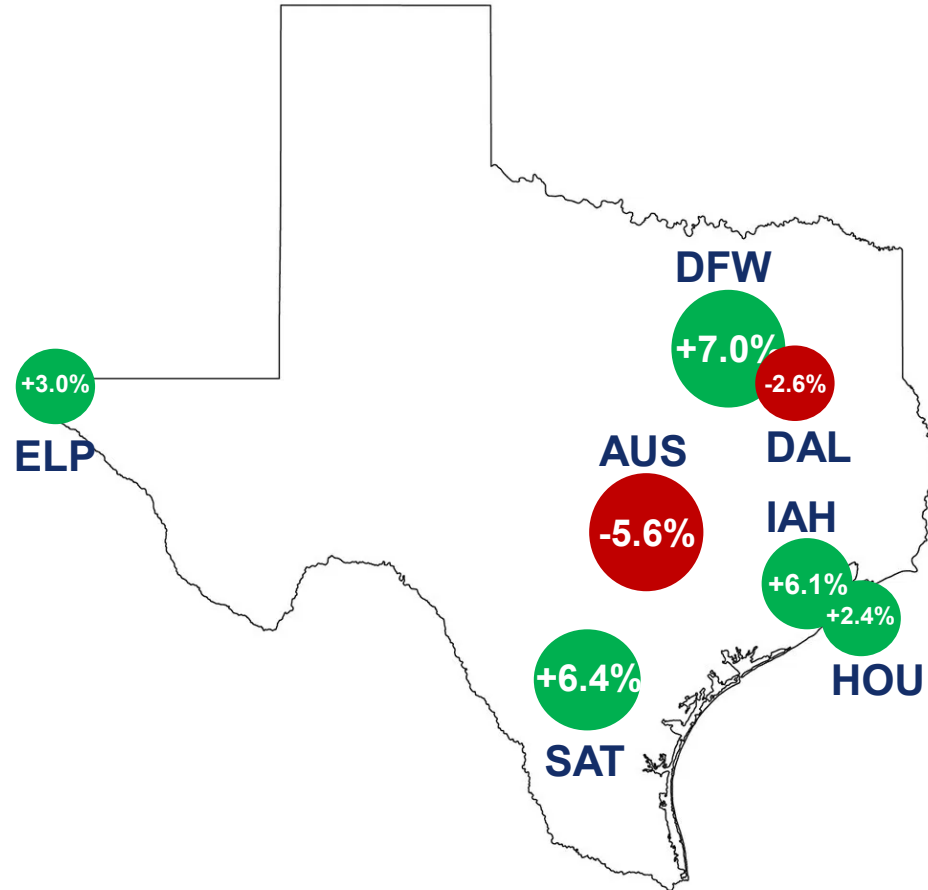
**Air Service Update  
San Antonio International Airport**

**Jeff Coyle, Assistant City Manager  
November 7, 2024**

# Nonstop Destinations



# Year-Over-Year Capacity Changes



## U.S. Medium Hub Airports

	Airport	YoY		Airport	YoY
1	Ft. Myers (RSW)	+11.8%	16	Jacksonville (JAX)	+4.6%
2	San Juan (SJU)	+11.6%	17	Boise (BOI)	+4.5%
3	★ West Palm Beach (PBI)	+11.2%	18	Sacramento (SMF)	+3.7%
4	★ Ontario (ONT)	9.8%	19	Columbus (CMH)	+3.6%
5	Hartford (BDL)	+8.3%	20	★ Charleston (CHS)	+3.6%
6	Milwaukee (MKE)	+7.6%	21	★ Burbank (BUR)	+3.0%
7	Pittsburgh (PIT)	+7.6%	22	Anchorage (ANC)	+2.9%
8	★ Raleigh-Durham (RDU)	+6.9%	23	Houston (HOU)	+2.4%
9	★ <b>San Antonio (SAT)</b>	<b>+6.4%</b>	24	Cleveland (CLE)	+1.8%
10	★ Indianapolis (IND)	+6.2%	25	★ Richmond (RIC)	+0.8%
11	Portland (PDX)	+5.8%	26	★ Memphis (MEM)	-1.8%
12	St. Louis (STL)	+5.5%	27	★ Dallas (DAL)	-2.6%
13	Cincinnati (CVG)	+5.2%	28	San Jose (SJC)	-4.5%
14	Omaha (OMA)	+5.1%	29	Oakland (OAK)	-6.5%
15	Kansas City (MCI)	+4.7%	30	Maui (OGG)	-12.1%

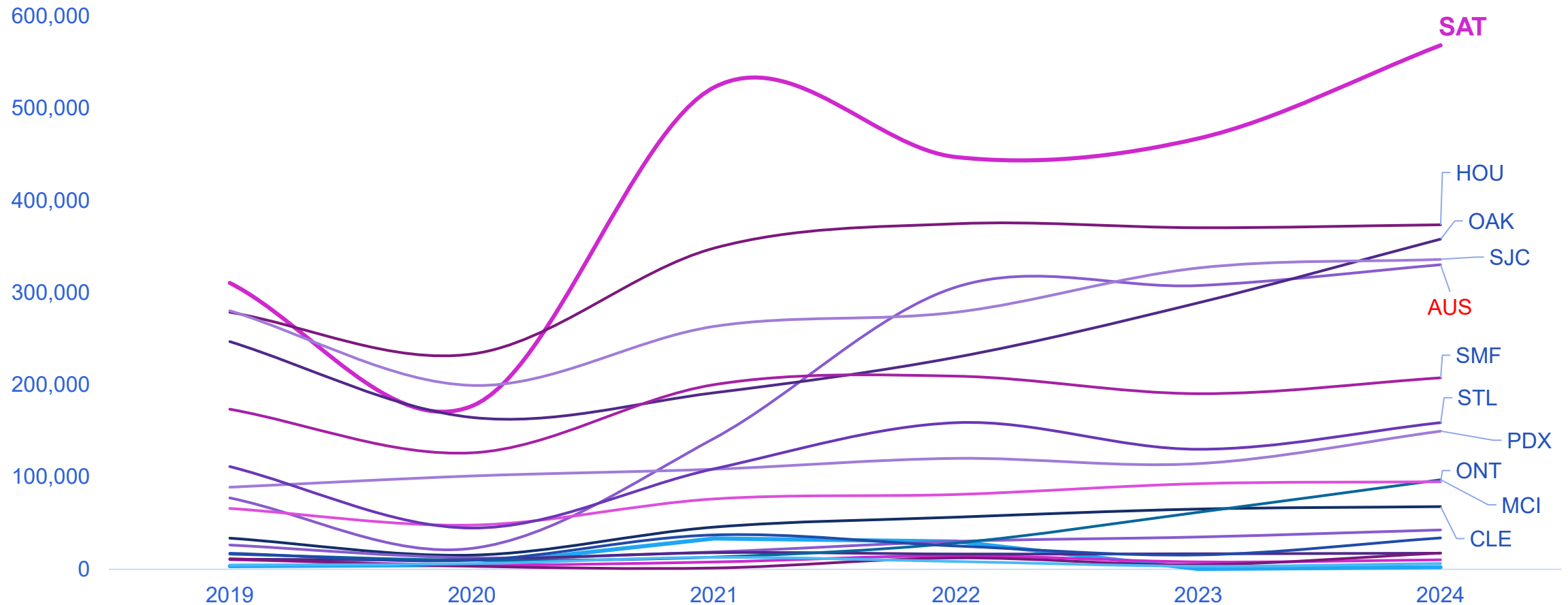
★ 2023 above 2019 passenger levels

# Continued Growth to Mexico



***SAT currently has more scheduled seats to Mexico than any other Medium Hub, AUS, and major airline hubs including Seattle, Minneapolis-St. Paul, Newark, Charlotte, & Detroit***

Annual Departing Seats to Mexico



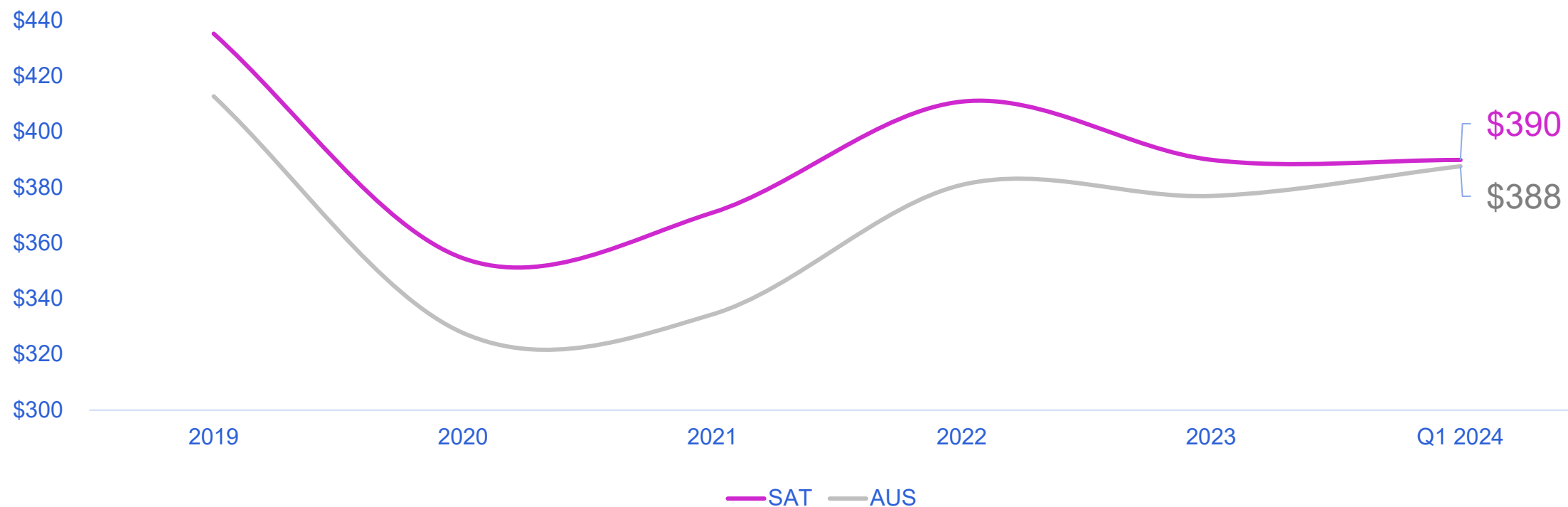


# Average Fare Trends



*The average difference in fare between SAT and AUS is now only \$2*

Average Annual Fares Adjusted for Inflation



Source(s): US Bureau of Transportation Statistics



## **Airport Revenue News' Director of the Year – Medium Hub Airport Jesus H. Saenz, Jr., IAP**

“Jesus Saenz stands out as a dynamic airport leader in the highly competitive south-central Texas region,” said Melissa K. Montes, vice president and publisher of Airport Experience News. “Under his leadership, SAT has reached record passenger levels and has embarked on an ambitious capital program that will facilitate further growth in the coming years.”

Special Session

# **Update on the Terminal Development Program & High Profile Solicitation Briefings**



November 7, 2024

# Today's Discussion

Terminal Development Program  
Update

Post-Solicitation Briefing on Concessions  
Packages for San Antonio International  
Airport (SAT)

# Terminal Development Program (TDP)

## New Terminal Program

- Planned Groundbreaking in December

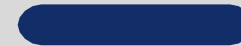
## NEPA Update



Approved:



Monday, October 28



FAA issued the Finding of No Significant Impact (FONSI) on October 28<sup>th</sup>



# Terminal Development Program (TDP)

## Terminal A Ground Load Facility (GLF)

- Construction on RON work began late Oct.
- Remains on track to be substantially complete October 2025



## New Parking Structure & Ground Transportation Center

- Industry Day held earlier this month with 66 firms attending
- Solicitation Document releasing on November 8, 2024

YOU'RE INVITED, PLEASE JOIN US!

**SAN ANTONIO INTERNATIONAL AIRPORT**  
GROUND TRANSPORTATION CENTER  
**INDUSTRY DAY**



This event will bring together contractors, subcontractors, and industry professionals to connect and collaborate on the upcoming Ground Transportation Center (GTC) project at San Antonio International Airport.

**OCTOBER 3, 2024**  
2:00 – 4:00PM

**Airport Center Boeing Room - Third Floor**  
10100 Reunion Place,  
San Antonio, TX 78216

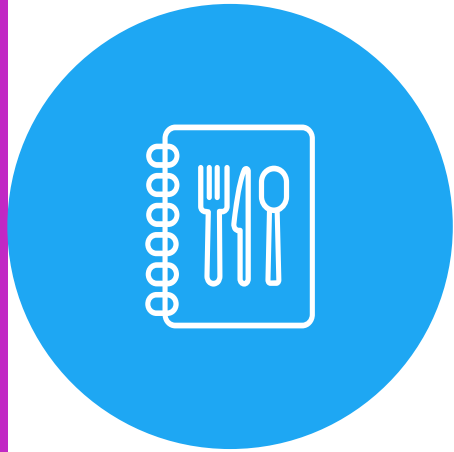
**Free Parking**  
Parking Garage Available

**EVENT REGISTRATION QR CODE**



# Post-Solicitation Briefing on Concessions Packages

# Concessions Packages Overview



## Food & Beverage

- Package 1
- Package 2

## Retail

- Package 3



## Locations

- Terminals A and B
- Pre- and Post-Security

(Does not include concepts awarded in 2019 (such as Smoke Shack, Whataburger) or Starbucks in Terminal B)

# Scoring Considerations for All 3 Concession Packages

- Showcases San Antonio as a premier destination with **at least 40%** local concepts
- Proves how they would achieve **an exceptional experience** for visitors
- Optimizes **non-airline revenue** opportunities
- **Meets or exceeds** Airport Concessions Disadvantaged Business Enterprise (ACDBE) Goals

# Evaluation Committee



**Jeff Coyle**  
Assistant City  
Manager



**Lori Houston**  
Assistant City  
Manager



**Jesus H.  
Saenz, Jr.**  
Director of  
Airports



**Gen. Angie Salinas  
(Retired)**  
CEO, Girls Scouts of  
South Texas &  
ASDC Chairwoman



**Marsha Hendler**  
CEO, TerraFina  
Energy & AAC  
Representative

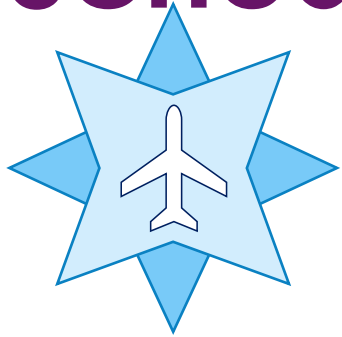


**Karen Ellis\***  
Customer  
Experience  
Administrator

\*served on Food & Beverage packages only



# Food & Beverage Packages Schedule



**October 11, 2023**  
Pre-Solicitation B Session



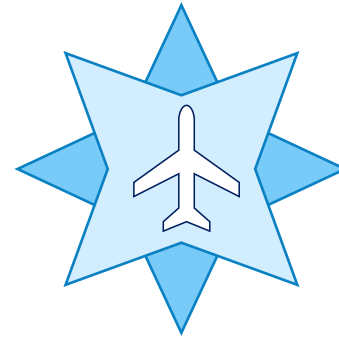
**October 27, 2023**  
Release of Solicitation Documents



**March 8, 2024**  
3 Firms Submitted Proposals for Each Package



**May 3, 2024**  
Evaluation Committee Scored Proposals; 2 firms selected for interviews



**June 7, 2024**  
Interviews with both firms; evaluation committee recommendation for Package 2 with recommendation to rebid Package 1



**November 7, 2024**  
Post-Solicitation B Session with target Council Date of November 21, 2024

# Initial Scoring Matrix

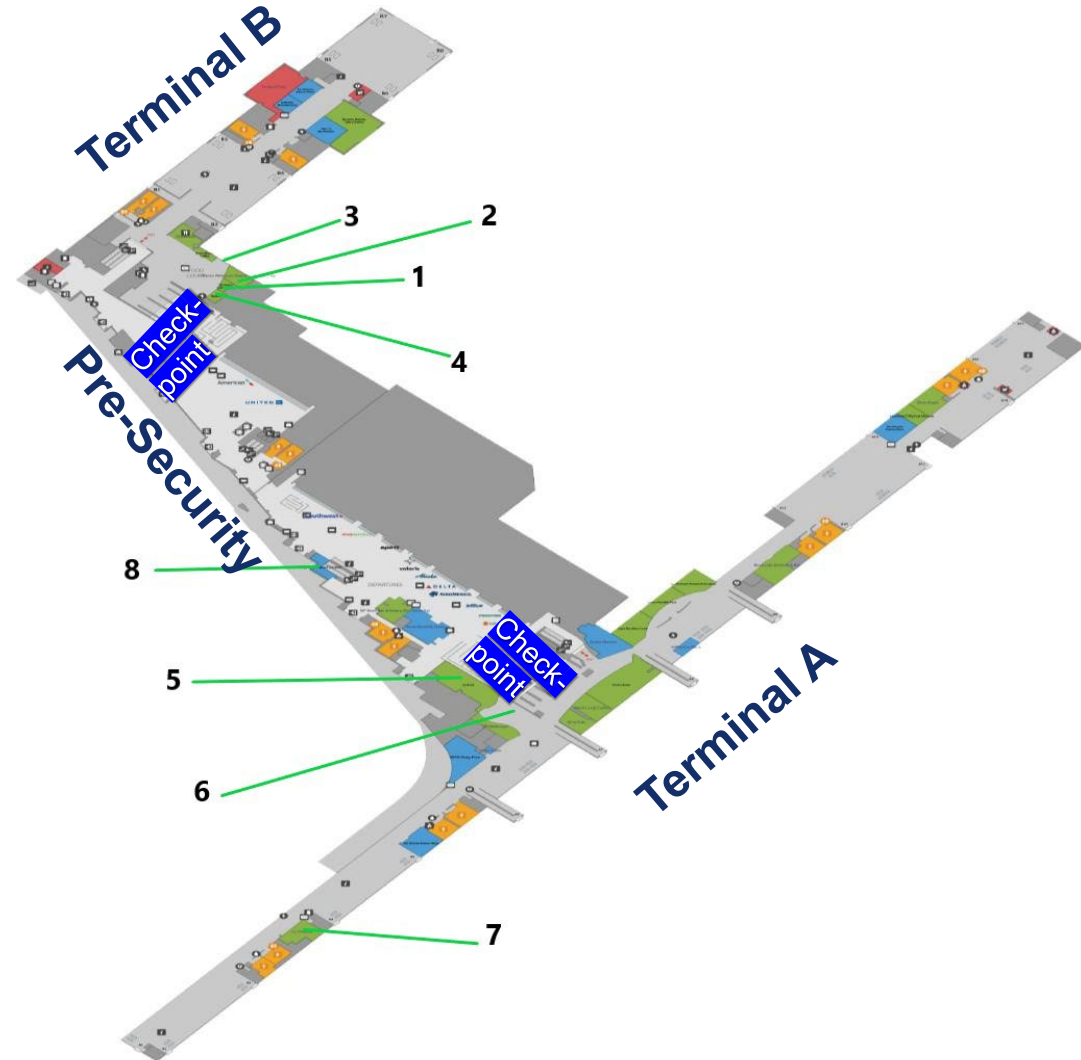
RFP for Food & Beverage Prime Concessionaires for San Antonio International Airport - Package #2 (24-001; 6100017424)  Score Summary INITIAL EVALUATION May 3, 2024	Maximum Points	Host True Flavors SAT FB, LLC 6905 Rockledge Drive Bethesda, MD 20817	SSP America SAT II, LLC 20408 Bashan Drive, Ste 300 Ashburn, VA 20147	AirStar - LTS/Marquis DAL, LLC 7929 Brookriver Drive, Ste 200 Dallas, TX 75247
A - Experience, Background, and Qualifications	35	30.17	28.83	20.83
B - Proposed Plan	45	28.00	35.00	24.17
A - B Sub-Total	80	58.17	63.83	45.00
C - Compensation	20	20.00	13.80	19.50
TOTAL SCORE	100	78.17	77.63	64.50
RANK BASED ON TOTAL SCORE		1	2	3

# Final Scoring Matrix

<b>RFP for Food &amp; Beverage Prime Concessionaires for San Antonio International Airport - Package #2 (24-001; 6100017424)</b>  <b>Score Summary</b> <b>FINAL EVALUATION</b> <b>June 7, 2024</b>	<b>Maximum Points</b>	<b>Host True Flavors</b> <b>SAT FB, LLC</b> <b>6905 Rockledge Drive</b> <b>Bethesda, MD</b> <b>20817</b>	<b>SSP America SAT II, LLC</b> <b>20408 Bashan Drive, Ste 300</b> <b>Ashburn, VA 20147</b>
<b>A - Experience, Background, and Qualifications</b>	<b>35</b>	<b>32.00</b>	<b>20.00</b>
<b>B - Proposed Plan</b>	<b>45</b>	<b>43.33</b>	<b>20.00</b>
<b>A - B Sub-Total</b>	<b>80</b>	<b>75.33</b>	<b>40.00</b>
<b>C - Compensation</b>	<b>20</b>	<b>20.00</b>	<b>13.80</b>
<b>TOTAL SCORE</b>	<b>100</b>	<b>95.33</b>	<b>53.80</b>
<b>RANK BASED ON TOTAL SCORE</b>		<b>1</b>	<b>2</b>

# Recommendation to Rebid Package 1

	Location with Current Concept: 12,594 Square Feet
1	Charley's Cheesesteaks (Terminal B)
2	Alamo Alehouse (Terminal B)
3	Pronto (Terminal B)
4	Sbarros Pizza (Terminal B)
5	La Gloria (Terminal A)
6	Food Court Area (Terminal A)
7	La Fruteria (Terminal A)
8	Marcy's Travel Center (Pre- Security, Terminal A)



# Recommendation to Award Package 2



**Host True Flavors  
SAT  
11,836 Square Feet**





Chef Johnny's  
**MERCADO**



  
**FREIGHT**  
FRIED CHICKEN















# TB-TS204 EXTERIOR RENDERING







# HORSESHOE

## TEQUILA BAR





# TA-NEW EXTERIOR RENDERING



**HORSESHOE**  
TEQUILA BAR

**A17**

 **HORSESHOE**  
TEQUILA BAR





# PHARM TABLE

APOTHECARY KITCHEN

GRAB & GO







# FREIGHT

## FRIED CHICKEN

THE REAL RECIPE

Fried Chicken  
Fries

Mac n Cheese  
Tenders

Menu board displaying items and prices.

Item	Price	Item	Price	Item	Price
Combo	\$10.99	Combo	\$10.99	Combo	\$10.99
Combo	\$10.99	Combo	\$10.99	Combo	\$10.99
Combo	\$10.99	Combo	\$10.99	Combo	\$10.99
Combo	\$10.99	Combo	\$10.99	Combo	\$10.99
Combo	\$10.99	Combo	\$10.99	Combo	\$10.99

PICK UP HERE

ORDER HERE





# TA-122 EXTERIOR RENDERING





# TA-124 EXTERIOR RENDERING



# ACDBE Joint Venture Partners: 35%

- **HMS Host: 65%**
- **True Flavors 35%**
  - Chef Johnny Hernandez



## Specific Concepts will have Local Equity Investors:

- Nicola Massey/Blaque World Business will have **10%** ownership in Freight Fried Chicken
- Allison Balfour/AMB Operations will have **10%** ownership in Southerleigh
- Crystal Dady/Dady Premiere Catering LLC have **10%** ownership in Tre Trattoria



# Host True Flavors SAT

## Local Concepts

70%+ Local Concepts

## Operations Excellence

Experienced team with  
cohesive package of eateries  
highlighting SA's food scene

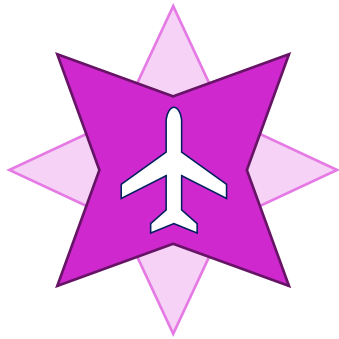
## Revenues

*Minimum Annual Guarantee:*  
*\$2,004,452 Projected*  
*Revenues over 10-Year Term:*  
*\$24.8 Million*

## ACDBE Commitment

ACDBE Goal: 26%  
Host Goal: 35%

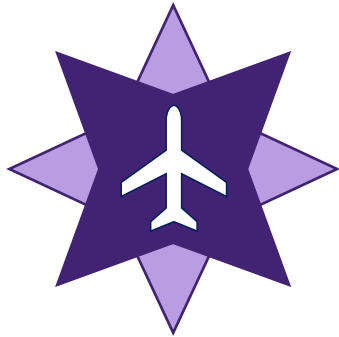
# Package 3 Retail Schedule



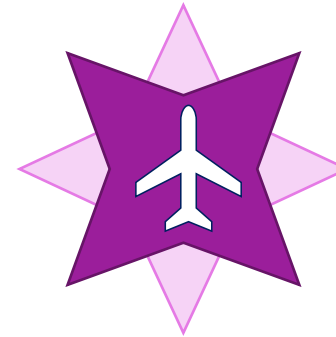
**October 11, 2023**  
Pre-Solicitation B Session



**June 21, 2024**  
Evaluation Committee  
Met & Scored 3 Responses



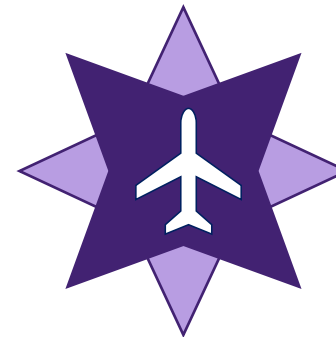
**October 27, 2023**  
Release of Solicitation  
Documents



**August 16, 2024**  
Interviews with 3 Firms;  
committee recommendation  
made & negotiations initiated



**March 8, 2024**  
3 Proposals Received for  
Package 3



**November 7, 2024**  
Post-Solicitation B Session  
with target Council Date of  
November 21, 2024

# Initial Score Matrix

<b>RFP for Food &amp; Beverage Concession Prime Concessionaires and Retail Concession Prime Concessionaire for San Antonio International Airport - Retail Package #3 (24-001; 6100017424)</b>  <b>Score Summary INITIAL EVALUATION June 21, 2024</b>				
	Maximum Points	Paradies Lagardere @ SAT 2024, LLC 2849 Paces Ferry Road, Suite 400, Overlook I Atlanta, GA 30339	Hudson Group (HG) Retail, LLC, a member of HG SAT Retail JV, LLC 1 Meadowlands Plaza, Suite 902 East Rutherford, NJ 07073	The Marshall Retail Group, LLC 3755 W Sunset Road, Suite A Las Vegas, NV 89118
A - Experience, Background and Qualifications	35	32.40	28.00	25.60
B - Proposed Plan	45	40.40	30.00	26.00
A - B Sub-Total	80	72.80	58.00	51.60
C - Compensation	20	15.90	19.90	20.00
TOTAL SCORE	100	88.70	77.90	71.60
RANK BASED ON TOTAL SCORE		1	2	3



# Final Score Matrix

<b>RFP for Food &amp; Beverage Concession Prime Concessionaires and Retail Concession Prime Concessionaire for San Antonio International Airport - Retail Package #3 (24-001; 6100017424)</b>  <b>Score Summary FINAL EVALUATION August 16, 2024</b>	<b>Maximum Points</b>	<b>Paradies Lagardere @ SAT 2024, LLC 2849 Paces Ferry Road, Suite 400, Overlook I Atlanta, GA 30339</b>	<b>Hudson Group (HG) Retail, LLC, a member of HG SAT Retail JV, LLC 1 Meadowlands Plaza, Suite 902 East Rutherford, NJ 07073</b>	<b>The Marshall Retail Group, LLC 3755 W Sunset Road, Suite A Las Vegas, NV 89118</b>
<b>A - Experience, Background and Qualifications</b>	<b>35</b>	<b>33.00</b>	<b>30.40</b>	<b>26.60</b>
<b>B - Proposed Plan</b>	<b>45</b>	<b>40.40</b>	<b>31.60</b>	<b>25.00</b>
<b>A - B Sub-Total</b>	<b>80</b>	<b>73.40</b>	<b>62.00</b>	<b>51.60</b>
<b>C - Compensation</b>	<b>20</b>	<b>15.90</b>	<b>19.90</b>	<b>20.00</b>
<b>TOTAL SCORE</b>	<b>100</b>	<b>89.30</b>	<b>81.90</b>	<b>71.60</b>
<b>RANK BASED ON TOTAL SCORE</b>		<b>1</b>	<b>2</b>	<b>3</b>



iStore  
express

B7  
B5

B

B8

B6

FELÍZ  
MODERN

B4

A17

A15

A13

A11

A



UNIVISION

Recommendation  
to Award  
Package 3

Paradies  
Lagardère  
@ SAT  
8,217  
Square  
Feet

**PRICKLY PEAR**  
PROVISIONS

A6

A5

[210] exchange

A2

CONFLUENCE MAR





# FELÍZ MODERN



ART - LIFE - FUN

FELÍZ  
MODERN

FELÍZ  
MODERN  
ART • LIFE • FUN



# PRICKLY PEAR PROVISIONS

currency  
exchange

currency excha

QUENCH + HYDRATE + RE

















# CONFLUENCE MARKET

COFFEE & SNACKS

COSTA

COFFEE

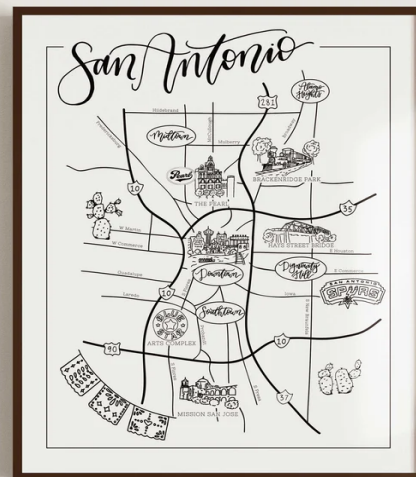






# iStore express







# Paradies Lagardère @ SAT

## ACDBE JV PARTNER: 26%

- Bold Bites LLC – Carino Cortez, Owner Operator
- Bold Bites, LLC operates several current concessions including Merit Coffee, Smoke Shack, Boss Bagels, Whataburger, Spurs Store.





# Paradies Lagardère @ SAT

## Local Concepts

70%+ Local Concepts

## Operations Excellence

Proven expertise in  
showcasing region's array of  
retail options

## Revenues

*Minimum Annual Guarantee:*  
*\$2,671,178: Projected*  
*Revenues over 10-Year Term:*  
*\$29.6 Million*

## ACDBE Commitment

ACDBE Goal: 26%  
Paradies Goal: 26%

B Session

# Update on the Terminal Development Program & High Profile Solicitation Briefings



November 7, 2024



Special Session

# Update on the Terminal Development Program & High Profile Solicitation Briefings



November 7, 2024

# Food and Beverage Package 1 Rebid

**Delivery Method** Request For Proposals

**Term** 10 years

**Estimated Contract Value** \$17.5 Million

## Evaluation Committee

- **Assistant City Manager** Jeff Coyle
- **Assistant City Manager** Alex Lopez
- **Aviation Director** Jesus H. Saenz, Jr. IAP
- **Airport System Development Committee Member**
- **Airport Advisory Commission Member**  
Juanita Sepulveda

## Schedule

- **Release of Solicitation Documents**, 1/15/2025
- **Proposals Due**, 3/15/2025
- **Selection/Negotiation Period**, 3/16/2025 through 06/2025
- **Post-Solicitation B Session/Council Action**, 08/2025



# Same Scoring Criteria/Point Allocation

- Showcased San Antonio as a premier destination with **at least 40%** local concepts
- Proved how they would achieve **an exceptional experience** for visitors
- Optimized **non-airline revenue** opportunities
- **Met or exceeded** Airport Concessions Disadvantaged Business Enterprise (ACDBE) Goals

## Evaluation Criteria

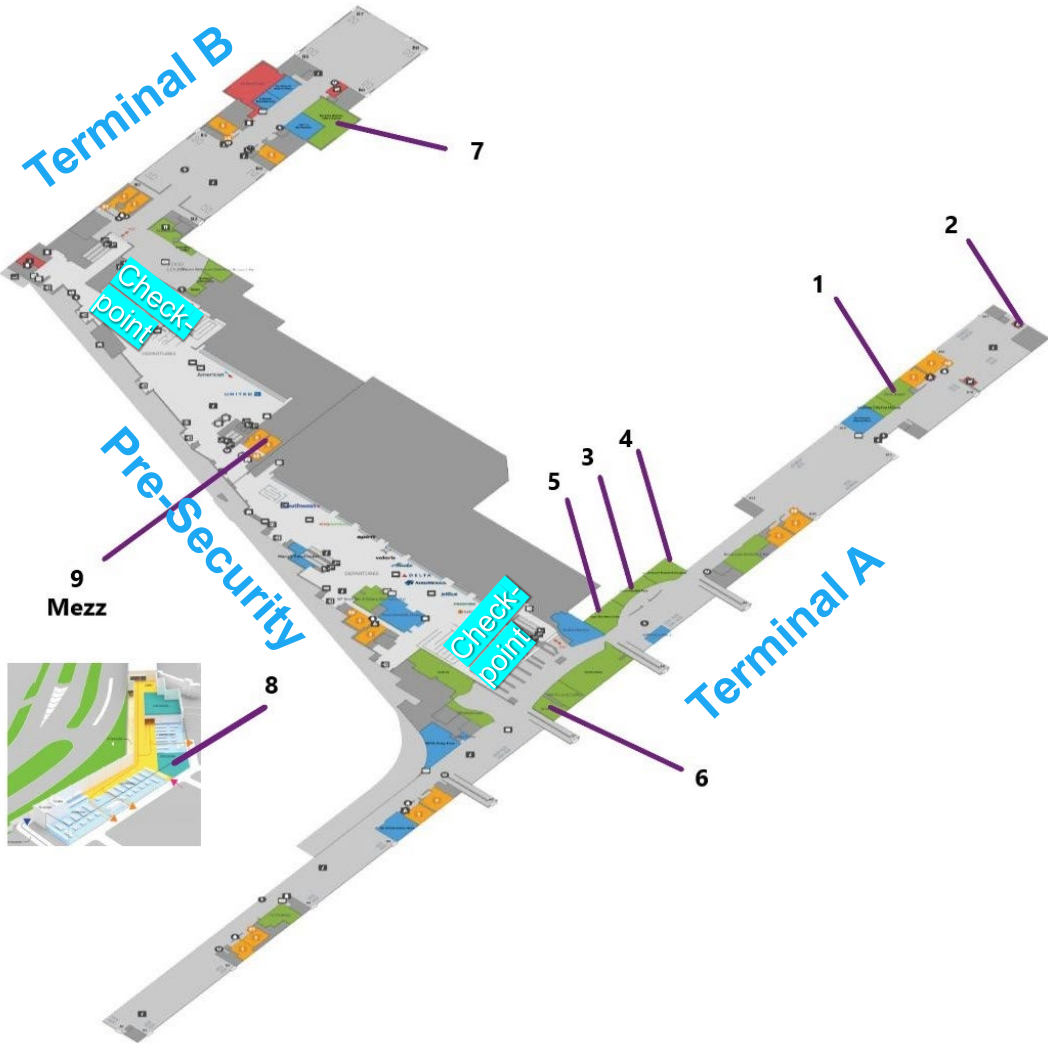
- **Experience, Background, Qualification:** 35 Points
- **Proposed Plan:** 45 Points
- **Compensation:** 20 Points
- **Airport Concessions Disadvantaged Business Enterprise**
  - Meet/Does Not Meet

# Food & Beverage Package 2

## 11,836 Square Feet



	Location with Current Concepts
1	Mission Ice House (Terminal A)
2	New Space (Terminal A)
3	Famous Famiglia (Terminal A)
4	Auntie Anne's (Terminal A)
5	Super Bien (Terminal A)
6	Vino Volo Terminal A)
7	Rosario's (Terminal B)
8	New Space in TA Ground Loading Facility
9	Dunkin Donuts (Terminal B)





# Retail Package 3

## 8,217 Square Feet

	Location with Current Concepts
1	Texas Monthly (Terminal A)
2	SA Express (Terminal A)
3	SA Express (Terminal A)
4	SA Express/InMotion (Terminal B)
5	Stars of SA (Terminal B)
6	Temporary Starbucks (Terminal B)
7	Ground Load Facility (Terminal A)
	Vending/Money Exchange Machines Throughout Terminals (pre/post security)

