

**Air Service Update
San Antonio International Airport**

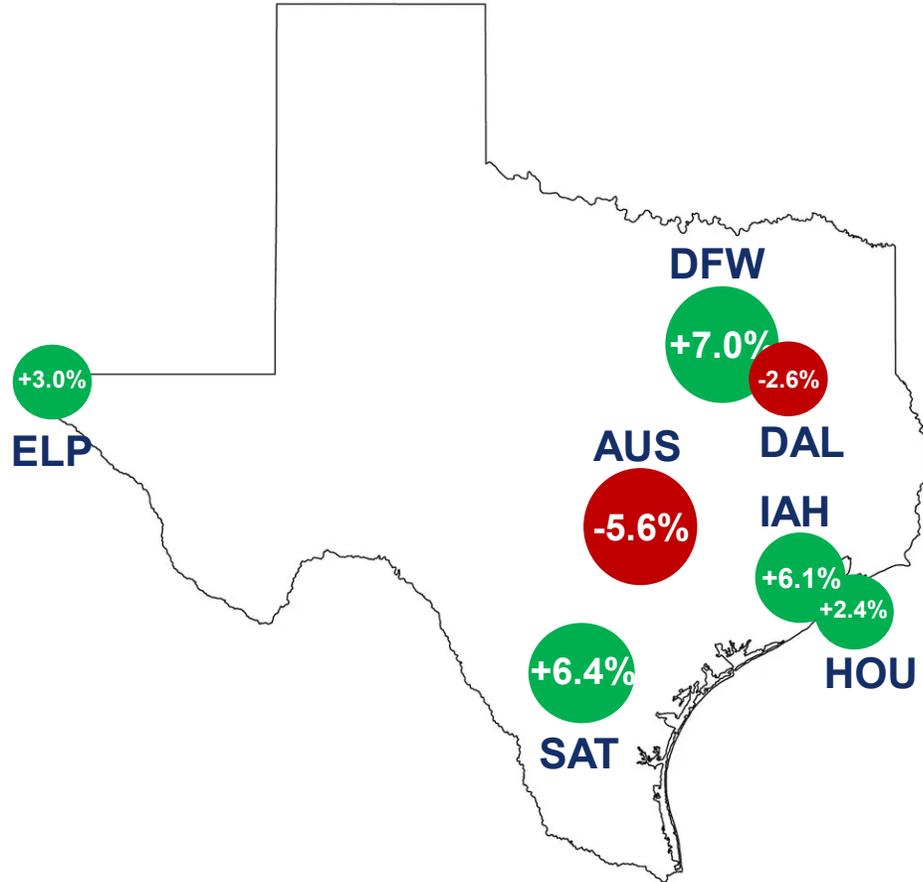
**Jeff Coyle, Assistant City Manager
November 7, 2024**

Nonstop Destinations



DEPARTING SOON 		
DEPARTING	AIRLINE	DATE
Boston	 DELTA	11/11/24
Monterrey	 volaris	11/12/24
Guadalajara	 VIVA	12/2/24
Reagan National	 American Airlines	TBD

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	★ San Antonio (SAT)	+6.4%	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

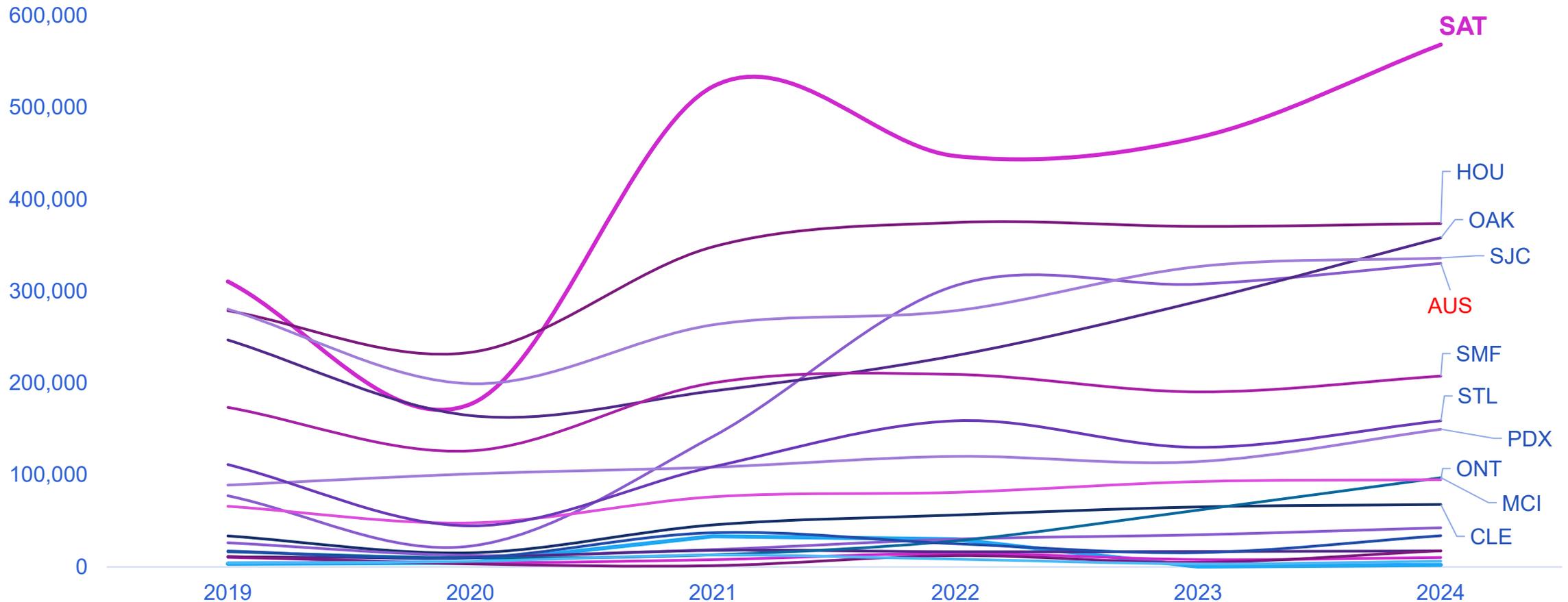
Source(s): Diio Mi, ACI-NA 2023/2019 North America Passenger Reports

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

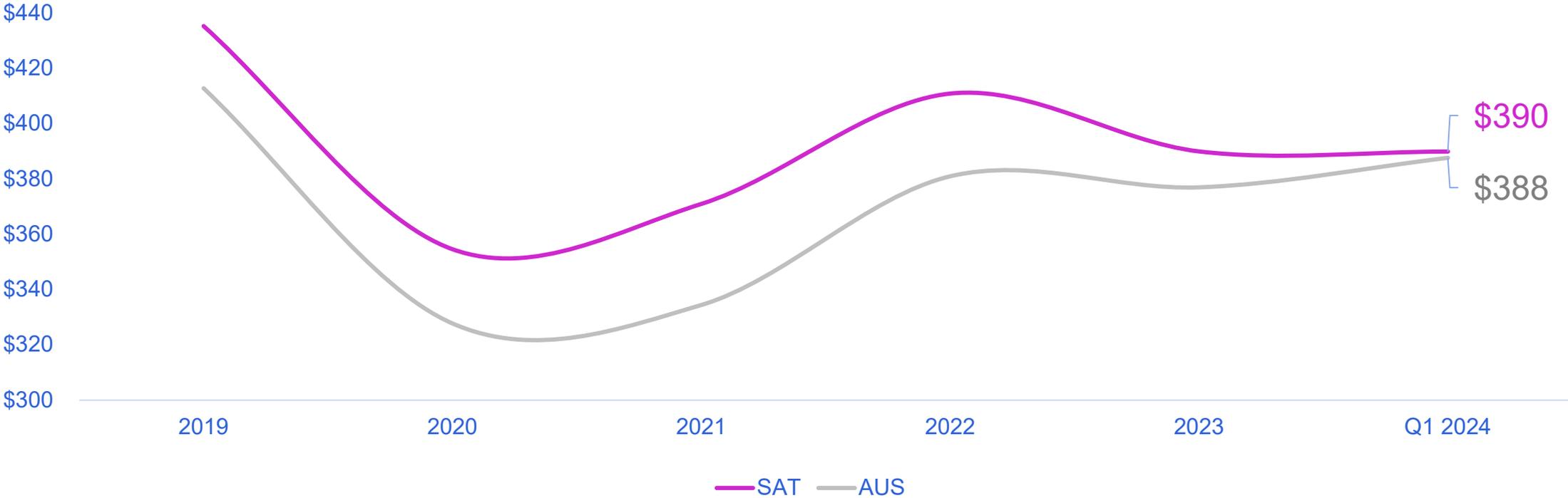
Annual Departing Seats to Mexico



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

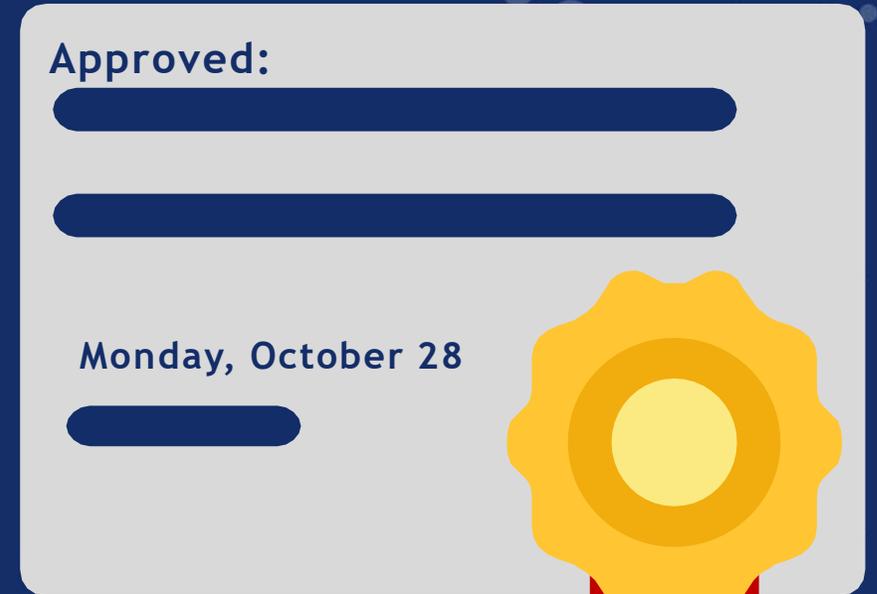
Post-Solicitation Briefing on Concessions
Packages for San Antonio International
Airport (SAT)

Terminal Development Program (TDP)

New Terminal Program

- Planned Groundbreaking in December

NEPA Update



FAA issued the Finding of No Significant Impact (FONSI) on October 28th

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

SAT
SAN ANTONIO
INTERNATIONAL AIRPORT

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

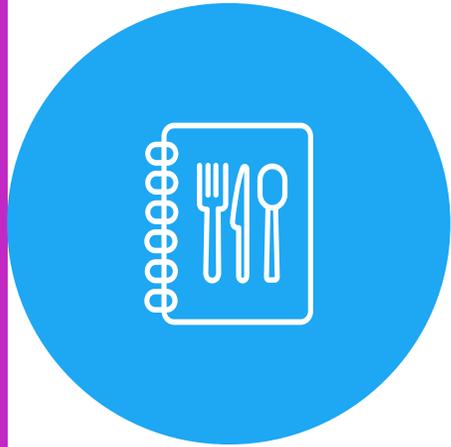
Airport Center Boeing Room - Third Floor
10100 Reunion Place,
San Antonio, TX 78216

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



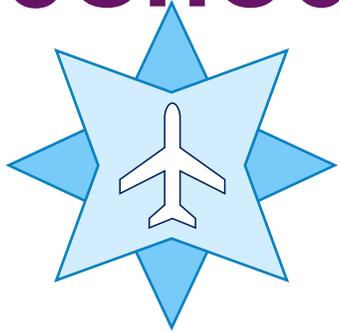
Marsha Hendler
CEO, TerraFina
Energy & AAC
Representative



Karen Ellis*
Customer
Experience
Administrator

*served on Food & Beverage packages only

Food & Beverage Packages Schedule



October 11, 2023
Pre-Solicitation B Session



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



October 27, 2023
Release of Solicitation
Documents



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



March 8, 2024
3 Firms Submitted
Proposals for Each
Package



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

Initial Scoring Matrix

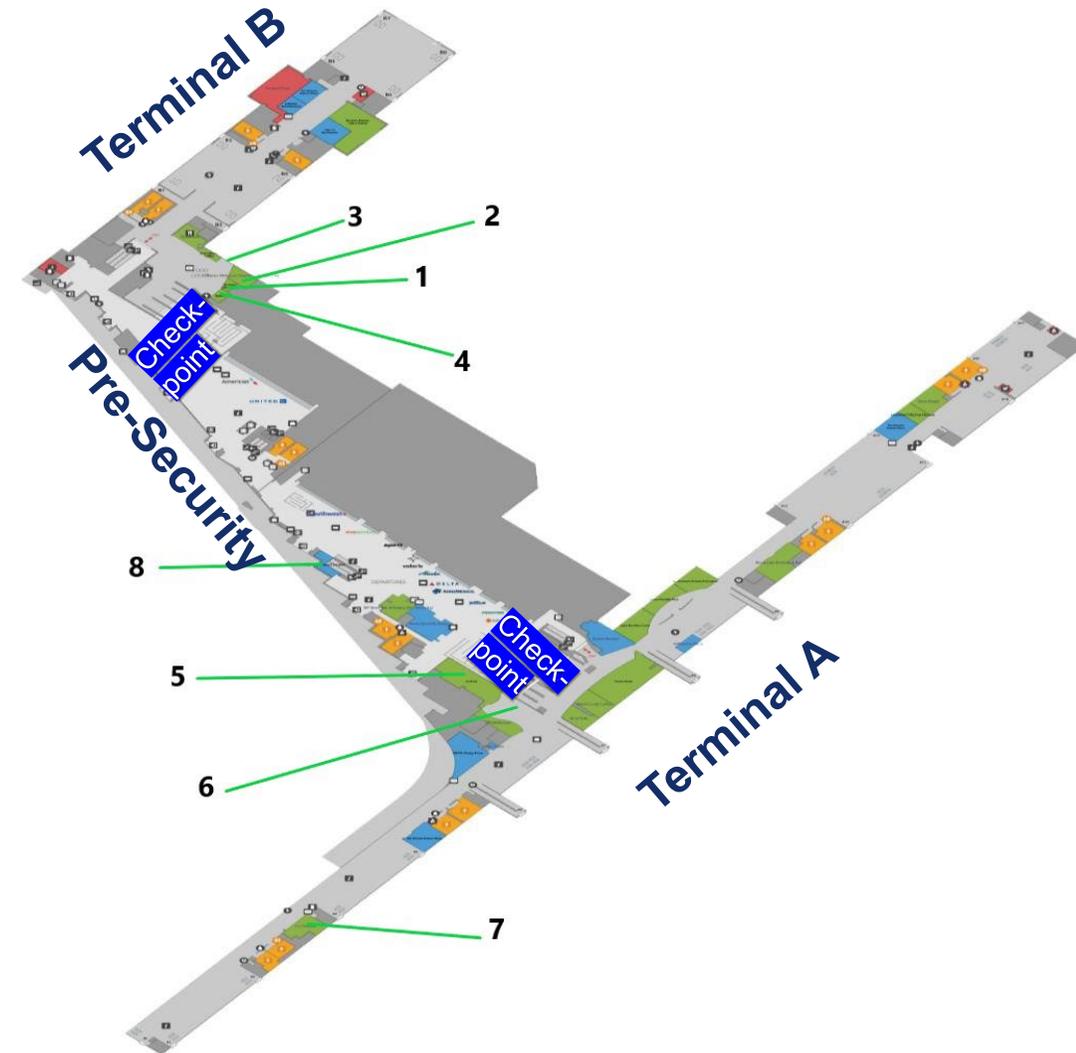
RFP for Food & Beverage Prime Concessionaires for San Antonio International Airport - Package #2 (24-001; 6100017424) Score Summary INITIAL EVALUATION May 3, 2024	Maximum Points	Host True Flavors SAT FB, LLC 6905 Rockledge Drive Bethesda, MD 20817	SSP America SAT II, LLC 20408 Bashan Drive, Ste 300 Ashburn, 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

RFP for Food & Beverage Prime Concessionaires for San Antonio International Airport - Package #2 (24-001; 6100017424) Score Summary FINAL EVALUATION June 7, 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
A - Experience, Background, and Qualifications	35	32.00	20.00
B - Proposed Plan	45	43.33	20.00
A - B Sub-Total	80	75.33	40.00
C - Compensation	20	20.00	13.80
TOTAL SCORE	100	95.33	53.80
RANK BASED ON TOTAL SCORE		1	2

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

PACKAGE 2
KEY PLAN



Chef Johnny's
MERCADO



FREIGHT
FRIED CHICKEN







SUDOR

MEZCAL

PASTELES

Chef Johnny's
MERCADO

TB-TS204 EXTERIOR RENDERING





HORSESHOE

TEQUILA BAR



TA-NEW EXTERIOR RENDERING



HORSESHOE
TEQUILA BAR

A17



PHARM TABLE

APOTHECARY KITCHEN





FREIGHT FRIED CHICKEN

THE REAL RECIPE

Fried Chicken
Fries

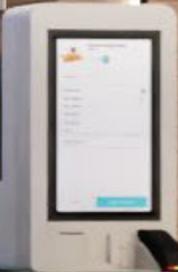
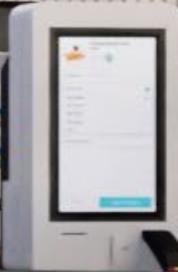
Mac n Cheese
Tenders

Item	Price	Item	Price
French Fry	\$1.99	Mac n Cheese	\$2.99
Chicken Fries	\$2.99	Mac n Cheese Tenders	\$3.99
Mac n Cheese	\$2.99	Mac n Cheese Tenders	\$3.99
Mac n Cheese Tenders	\$3.99	Mac n Cheese Tenders	\$3.99

Item	Price	Item	Price
French Fry	\$1.99	Mac n Cheese	\$2.99
Chicken Fries	\$2.99	Mac n Cheese Tenders	\$3.99
Mac n Cheese	\$2.99	Mac n Cheese Tenders	\$3.99
Mac n Cheese Tenders	\$3.99	Mac n Cheese Tenders	\$3.99

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

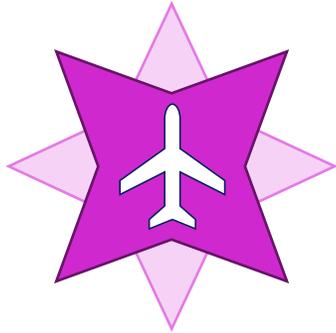
Revenues

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



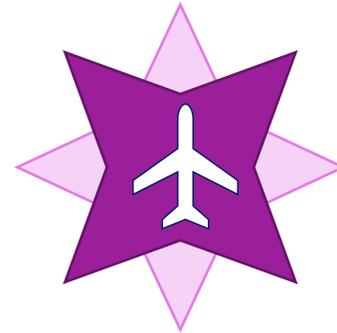
October 11, 2023
Pre-Solicitation B Session



June 21, 2024
Evaluation Committee
Met & Scored 3 Responses



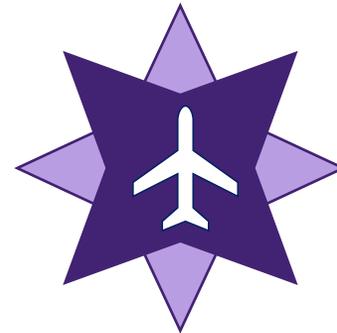
October 27, 2023
Release of Solicitation
Documents



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

RFP for Food & Beverage Concession Prime Concessionaires and Retail Concession Prime Concessionaire for San Antonio International Airport - Retail Package #3 (24-001; 6100017424) Score Summary INITIAL EVALUATION June 21, 2024	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

RFP for Food & Beverage Concession Prime Concessionaires and Retail Concession Prime Concessionaire for San Antonio International Airport - Retail Package #3 (24-001; 6100017424) Score Summary FINAL EVALUATION August 16, 2024	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	33.00	30.40	26.60
B - Proposed Plan	45	40.40	31.60	25.00
A - B Sub-Total	80	73.40	62.00	51.60
C - Compensation	20	15.90	19.90	20.00
TOTAL SCORE	100	89.30	81.90	71.60
RANK BASED ON TOTAL SCORE		1	2	3



iStore express

B7
B5

B

B8
B6
B4

FELÍZ MODERN

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

FELÍZ
MODERN
ART • LIFE • FUN

ART - LIFE - FUN

FELÍZ
MODERN



PRICKLY PEAR PROVISIONS

QUENCH + HYDRATE + RE

currency exchange

currency excha





MILITARY CITY USA. ★

CITY OF SAN ANTONIO

SAN ANTONIO
TEXAS

A man in a dark suit and a woman in a black dress and high heels are walking away from the camera towards the left side of the frame.

A man in a white t-shirt and khaki pants is standing near a display of goods, possibly a snack aisle, looking at the products.

A man in a grey sweater and white pants is walking towards the camera, pulling a black suitcase.

A woman in a black dress and high heels is walking towards the camera, carrying a white folder or bag.

A man in a military uniform is walking away from the camera towards the left side of the frame.

210 exchange





UNIVISION



CONFLUENCE MARKET

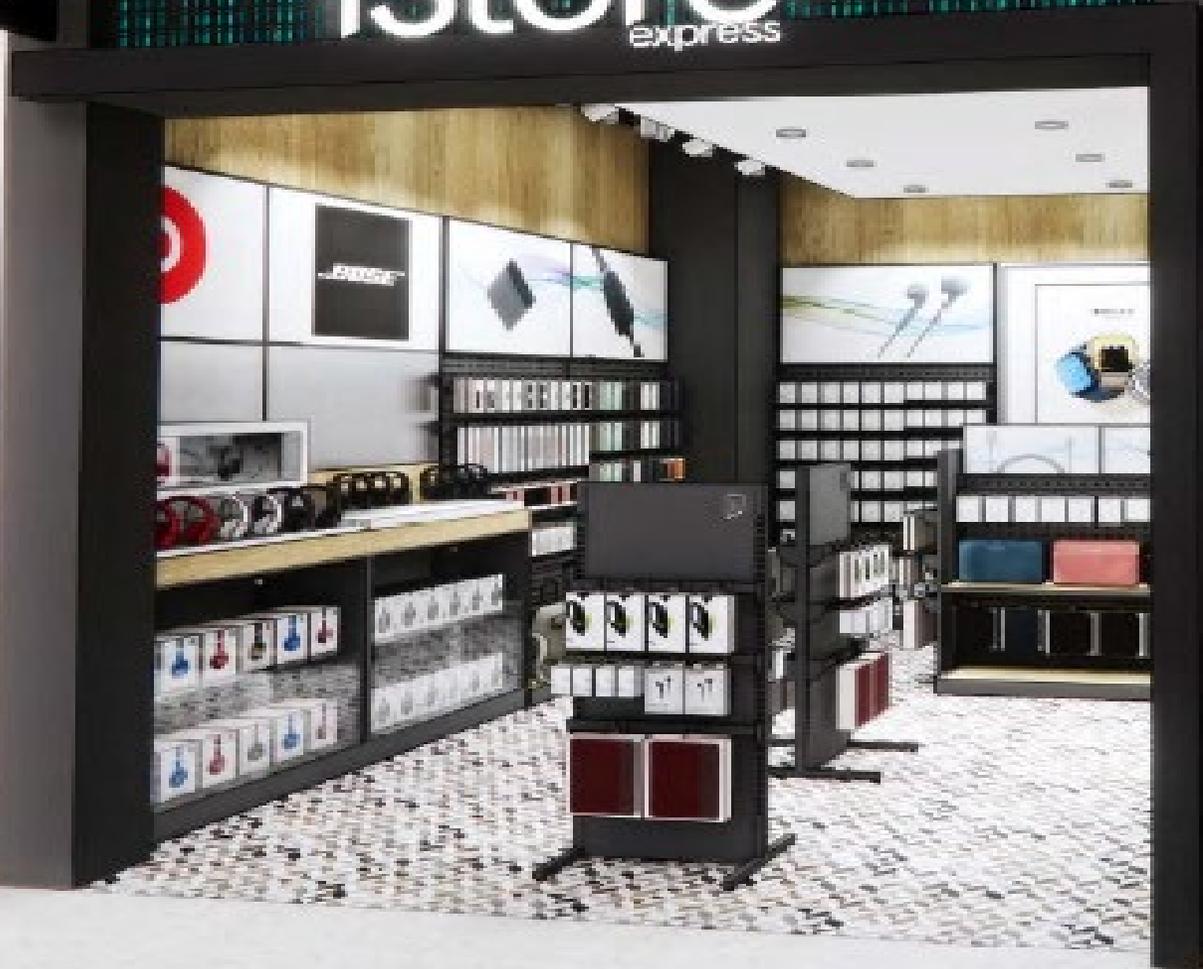
COFFEE & SNACKS

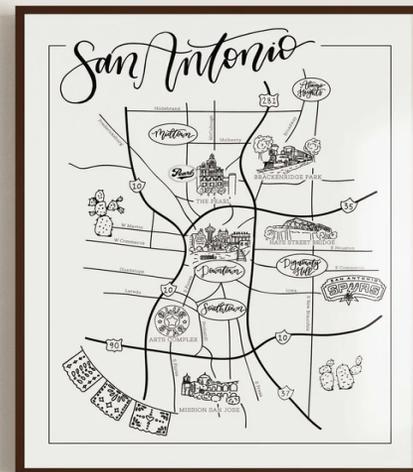
COSTA
ESPRESSO



iStore
express

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

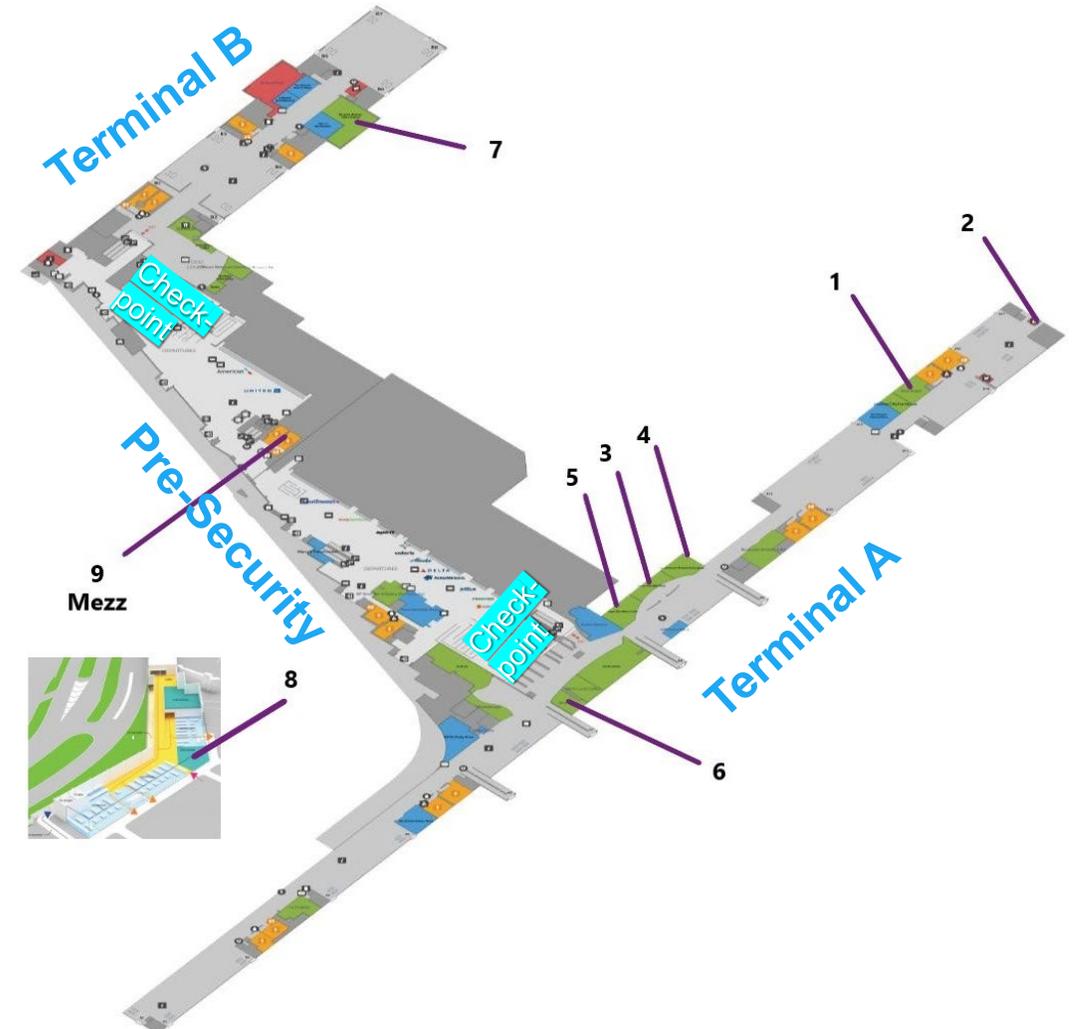
Evaluation Criteria

- **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

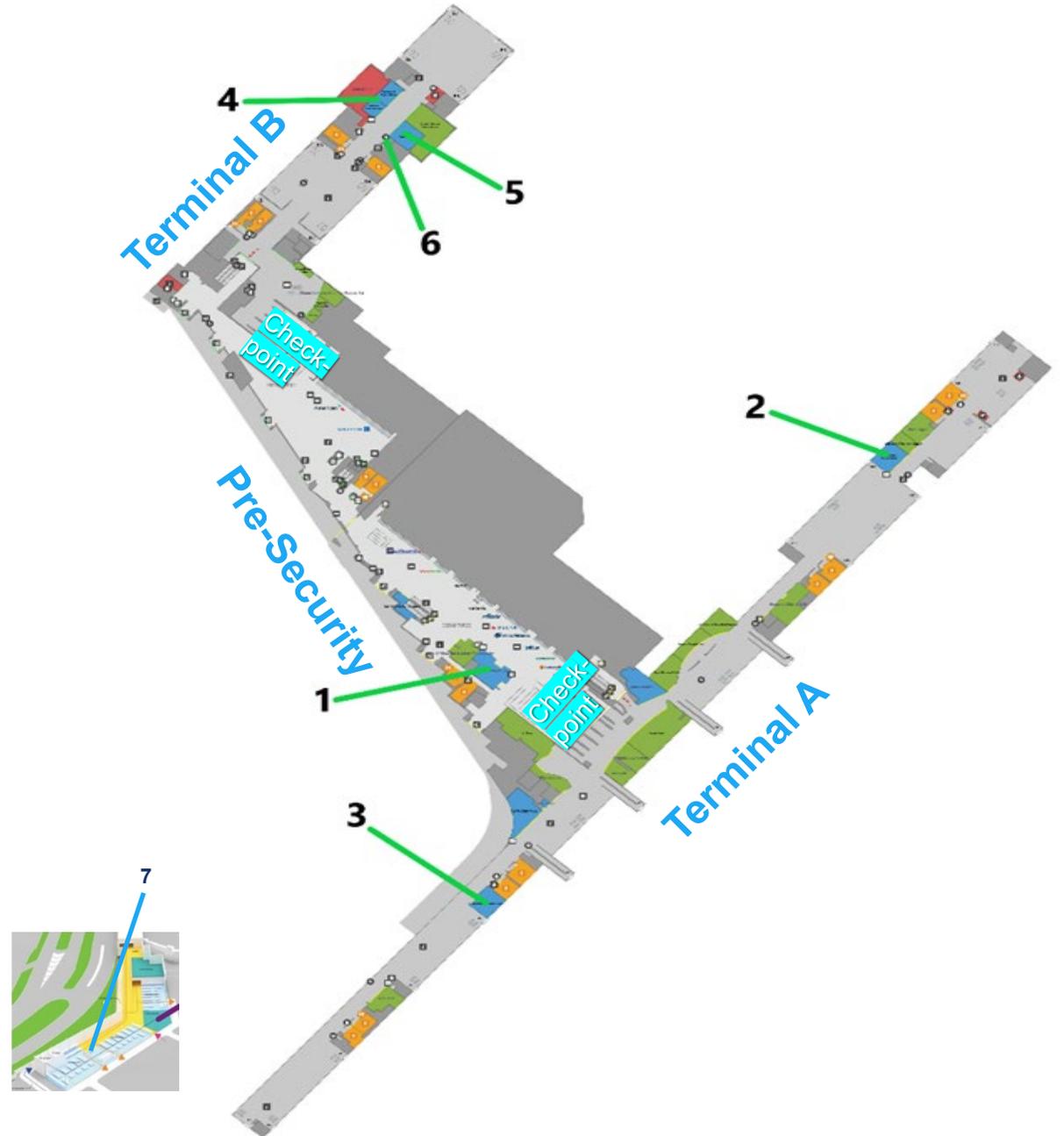
	Location with Current Concepts
1	Mission Ice House (Terminal A)
2	New Space (Terminal A)
3	Famous Famiglia (Terminal A)
4	Auntie Anne's (Terminal A)
5	Super Bien (Terminal A)
6	Vino Volo Terminal A)
7	Rosario's (Terminal B)
8	New Space in TA Ground Loading Facility
9	Dunkin Donuts (Terminal B)



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)





PACK
PROPOSED C
LOCAL BRAN









