



# Meet the Primes

September 21, 2021

## Concession Opportunities

Presented By:

Jim DeCock

Director(interim) Revenue Generation &  
Partnership Development

September 21, 2021

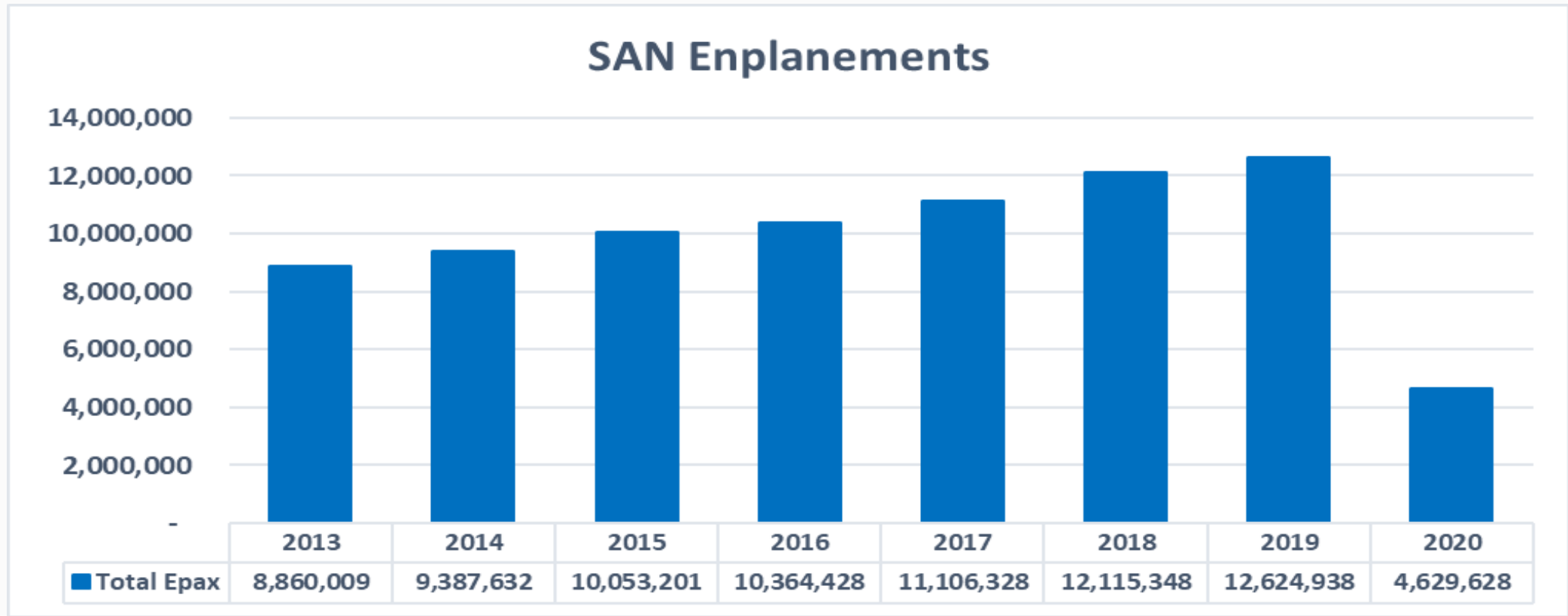
# Agenda

- SAN Historical Data
- NEW T1 Concession Opportunities
- Terminal 2 Retail Opportunities



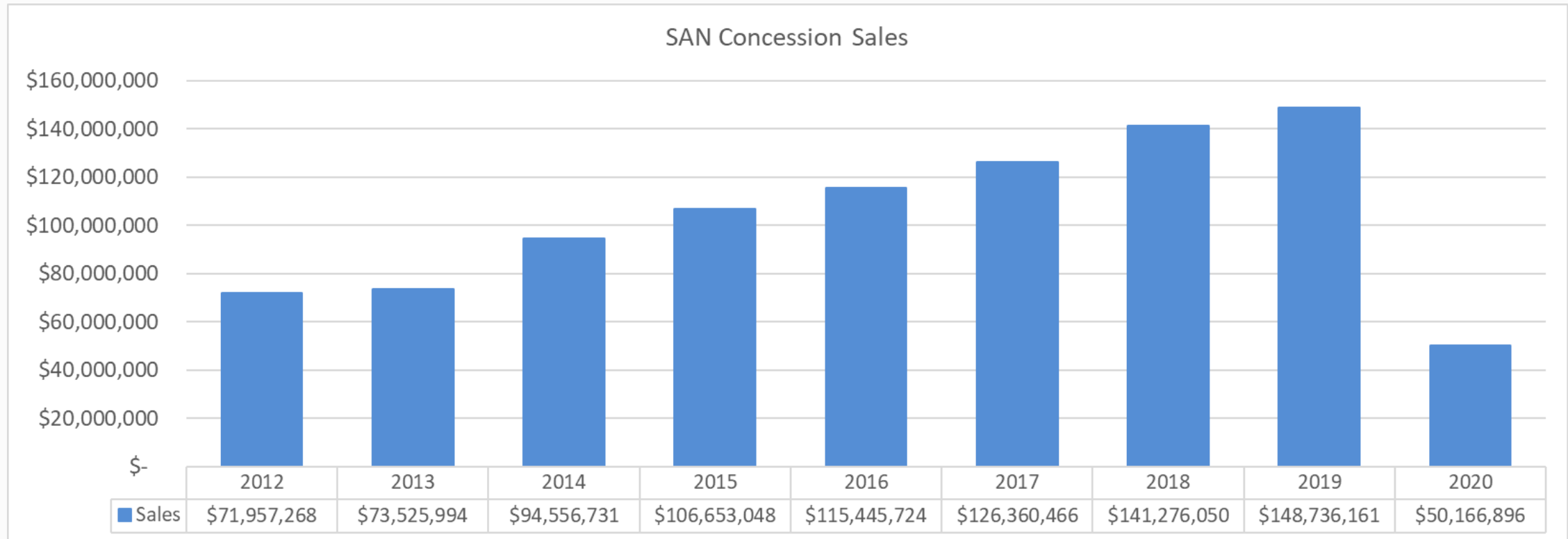
# SAN Future Concession Opportunities

## SAN Historical Data-Enplanements



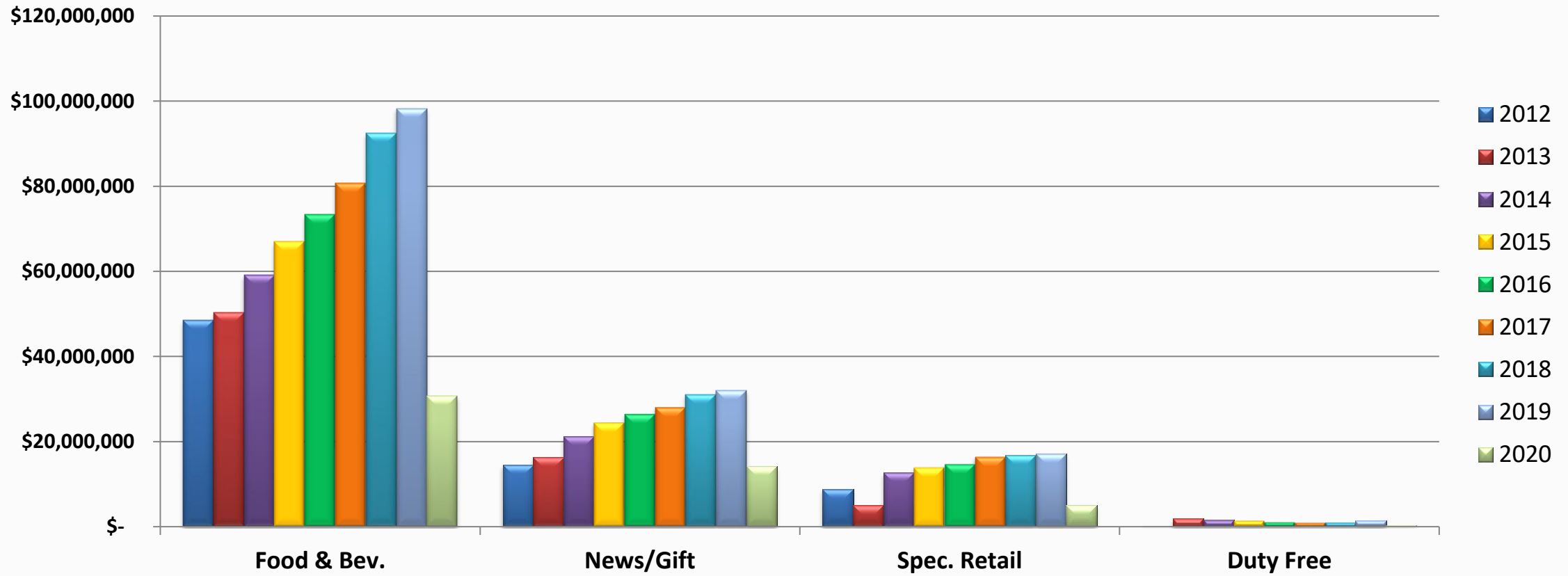
# SAN Future Concession Opportunities

## SAN Historical Data-Concession Sales



# SAN Future Concession Opportunities

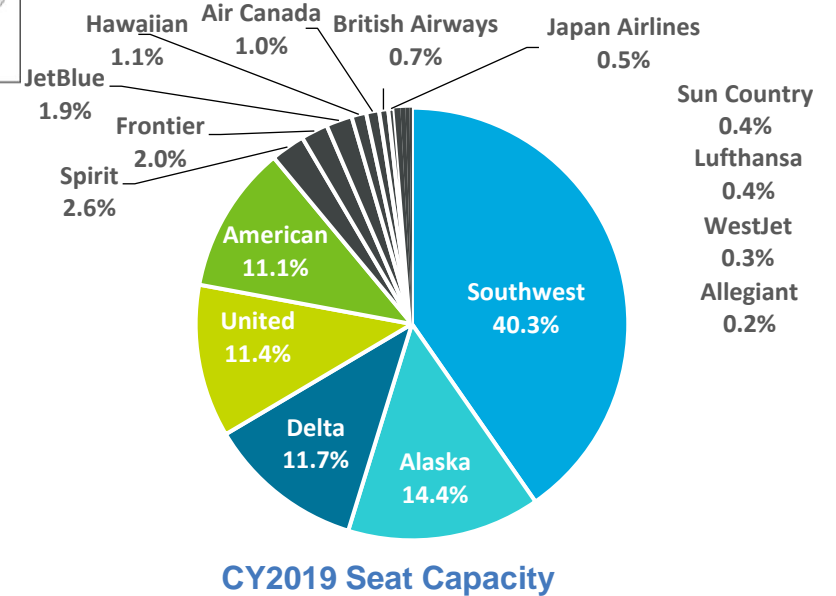
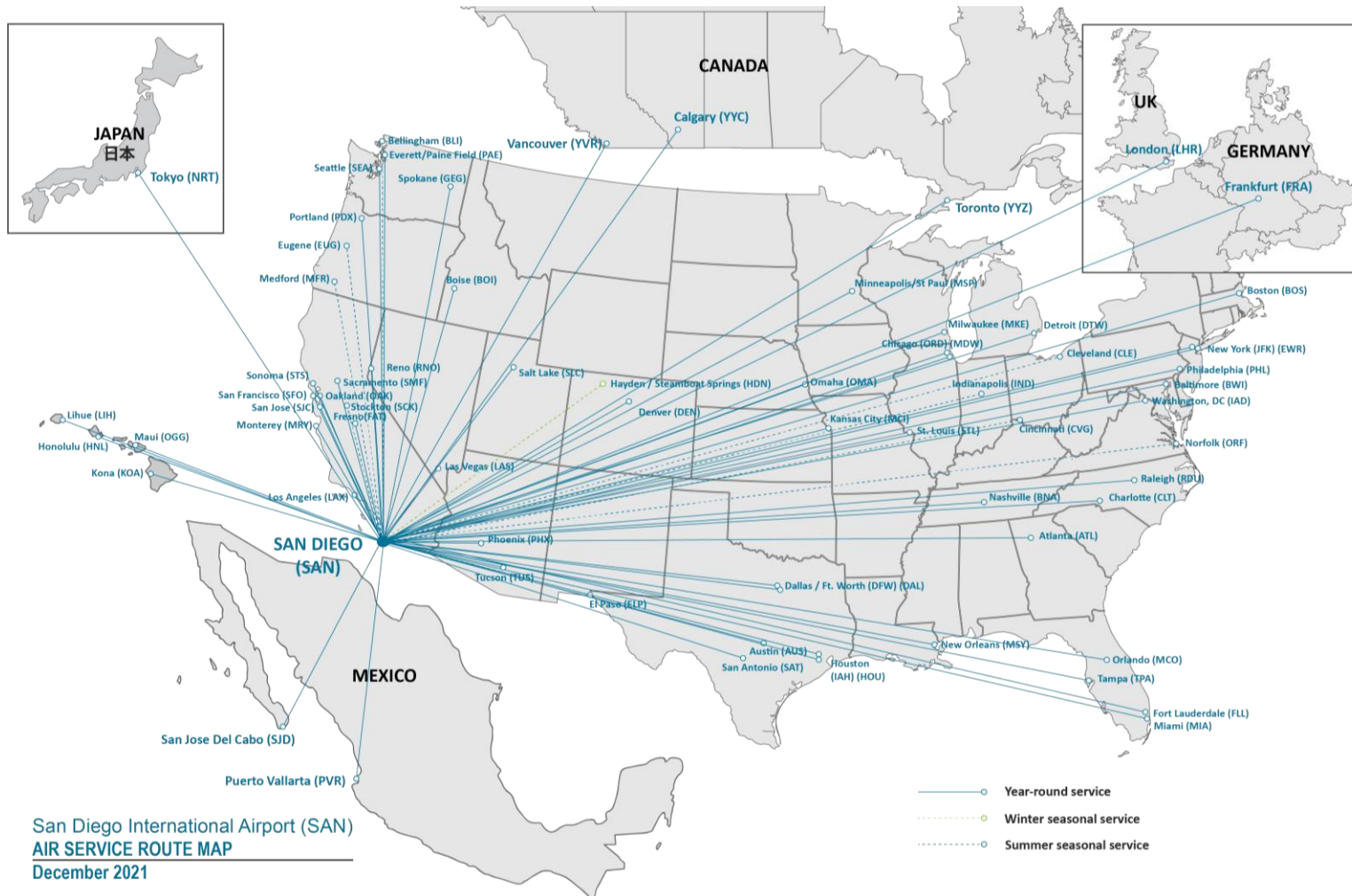
## SAN Historical Data-Concession Sales



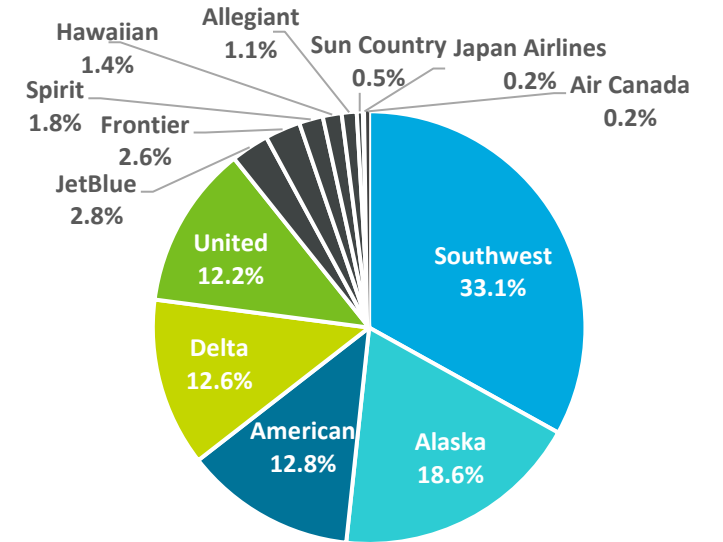
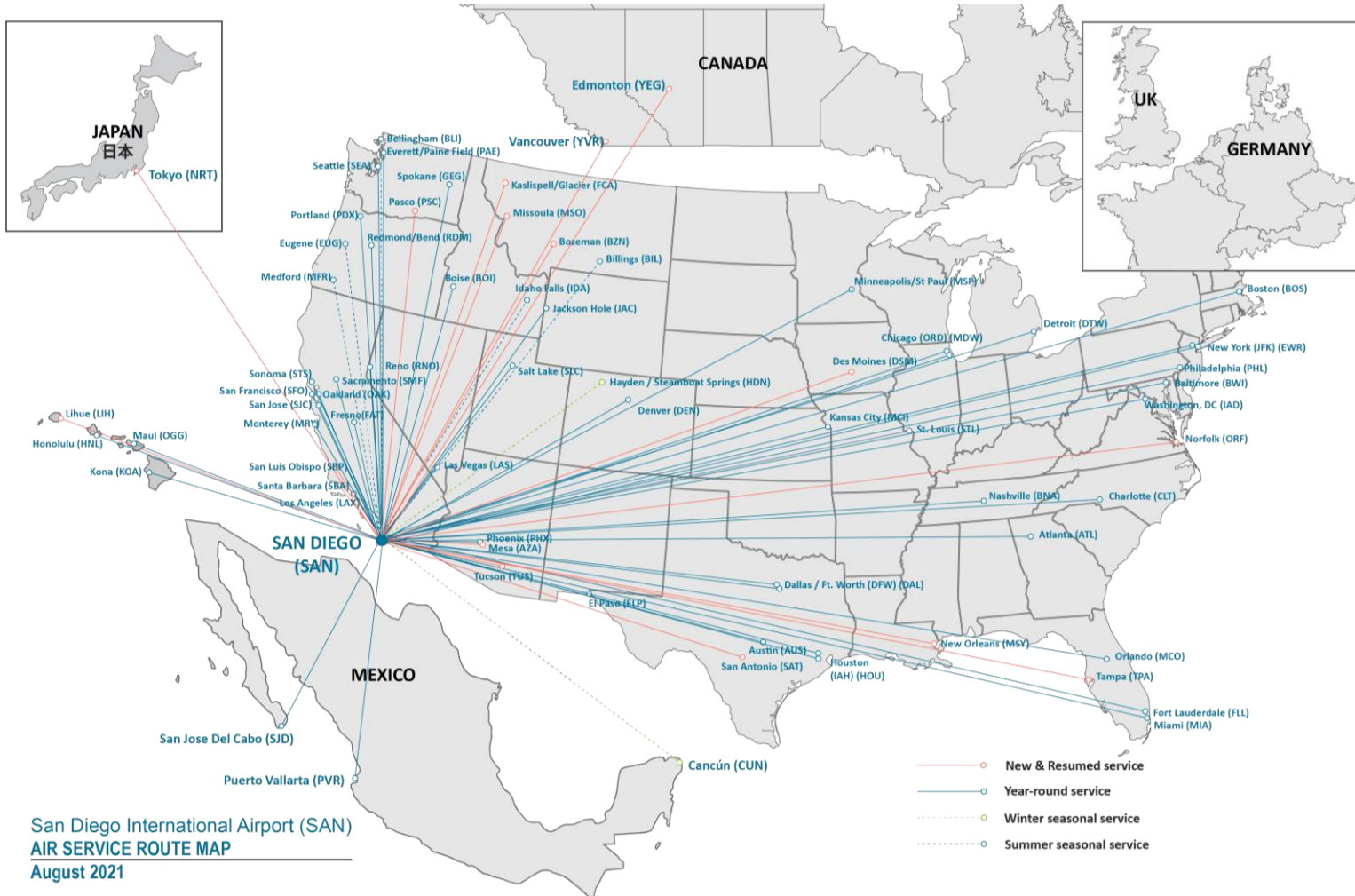
# SAN Nonstops

August 2021

# 2019: 16 Airlines to 71 Destinations



# 16 New Routes So Far in 2021



August 2021 Seat Capacity

San Diego International Airport (SAN)  
AIR SERVICE ROUTE MAP  
August 2021



Source: Cirium Schedules August 2021



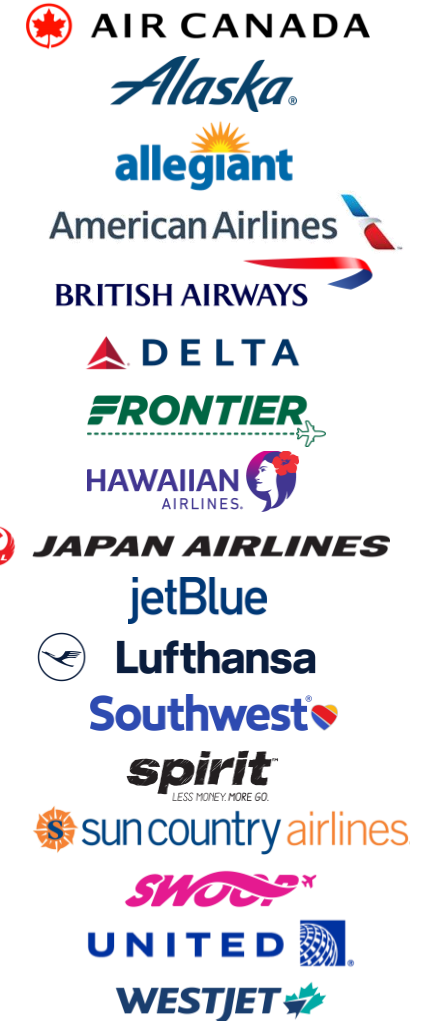
# 2021: 17 Airlines to Over 75 Nonstop Destinations

Albuquerque, NM  
 Atlanta, GA  
 Austin, TX  
 Baltimore, MD  
 Bellingham, WA\*\*  
 Billings, MT\*\*  
 Boise, ID  
 Boston, MA  
 Bozeman, MT\*\*  
 Calgary, Canada\*  
 Cancún, Mexico\*\*  
 Charlotte-Douglas, NC  
 Chicago-Midway, IL  
 Chicago-O'Hare, IL  
 Dallas/Fort Worth, TX  
 Dallas-Love, TX  
 Denver, CO  
 Des Moines, IA\*\*  
 Detroit, MI  
 Edmonton, Canada\*\*

El Paso, TX  
 Eugene, OR\*\*  
 Everett, WA  
 Fort Lauderdale, FL  
 Frankfurt, Germany\*  
 Fresno, CA  
 Hayden, CO\*\*  
 Honolulu/Oahu, HI  
 Houston-Hobby, TX  
 Houston-Intercontinental, TX  
 Idaho Falls, ID\*\*  
 Jackson Hole, WY\*\*  
 Kahului/Maui, HI  
 Kalispell-Glacier, MT\*\*  
 Kansas City, MO  
 Kona/Hawaii, HI  
 Las Vegas, NV  
 Lihue, HI  
 London-Heathrow, United Kingdom\*  
 Los Angeles, CA

Medford, OR\*\*  
 Miami, FL  
 Minneapolis/St. Paul, MN  
 Missoula, MT  
 Monterey, CA  
 Nashville, TN  
 New Orleans, LA  
 New York-JFK, NY  
 Newark, NJ  
 Norfolk, VA  
 Oakland, CA  
 Orlando, FL  
 Pasco, WA\*\*  
 Philadelphia, PA  
 Phoenix-Sky Harbor, AZ  
 Phoenix-Mesa, AZ  
 Portland, OR  
 Puerto Vallarta, Mexico  
 Redmond/Bend, OR  
 Reno, NV

Sacramento, CA  
 Salt Lake City, UT  
 San Antonio, TX  
 San Francisco, CA  
 San Jose del Cabo, Mexico  
 San Jose, CA  
 San Luis Obispo, CA  
 Santa Barbara, CA  
 Santa Rosa, CA  
 Seattle, WA  
 Spokane, WA  
 St. Louis, MO  
 Tampa, FL\*\*  
 Tokyo-Narita, Japan  
 Toronto, Canada\*  
 Tucson, AZ  
 Vancouver, Canada  
 Washington-Dulles, VA



\*Temporarily Suspended

\*\*Seasonal Service



Source: Published Cirium Schedules for CY2021, as of August 11, 2021

NEW  
T1



NEW  
**T1**

**NOW ARRIVING.** CONSTRUCTION JOBS.

NEW  
**T1**

**NOW ARRIVING.** BETTER EXPERIENCE.

NEW  
**T1**

**NOW ARRIVING.** AN ECONOMIC ENGINE.

NEW  
**T1**





**NOW ARRIVING.** MORE DINING & SHOPPING.

NEW  
**T1**

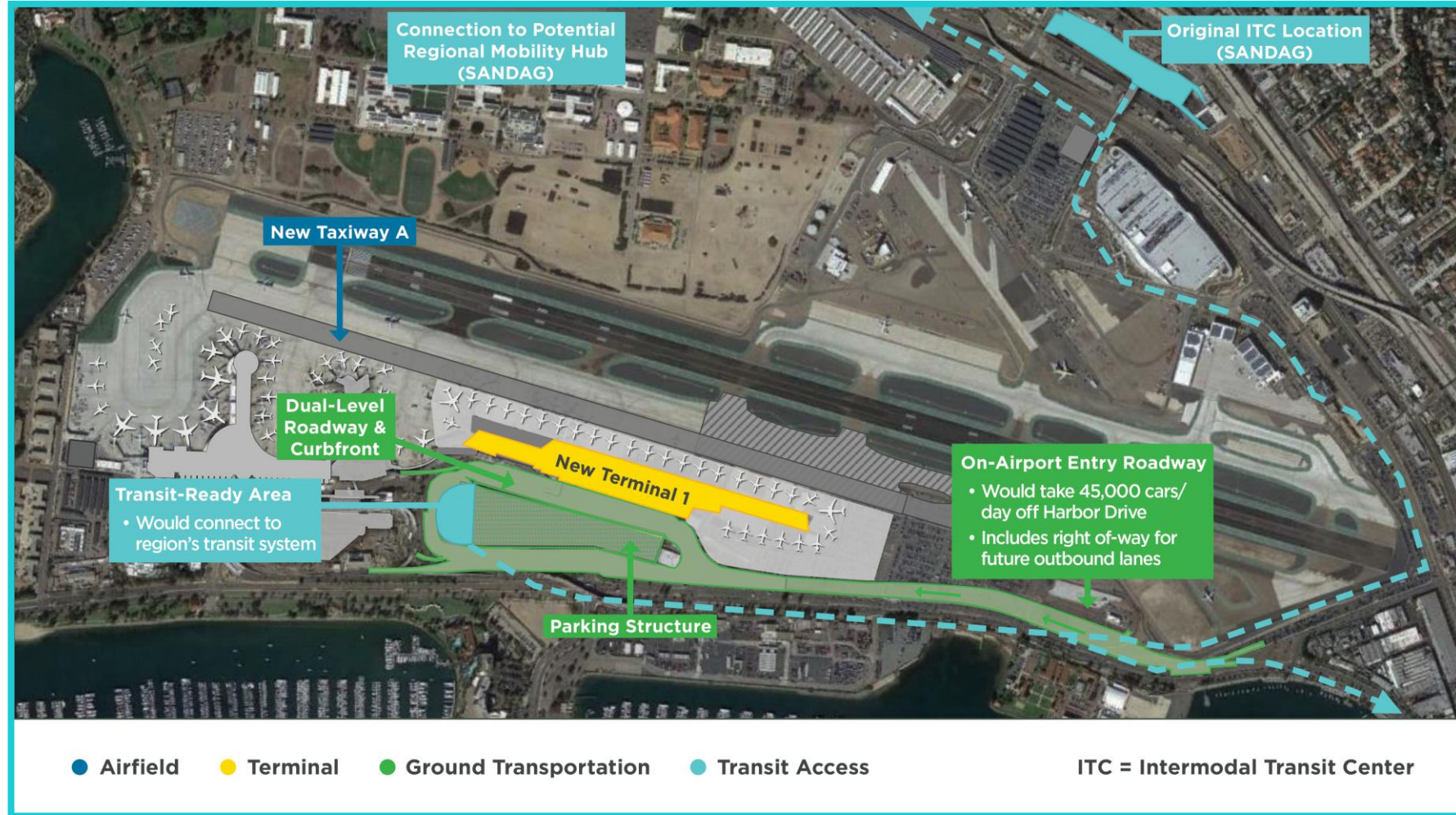
**NOW ARRIVING.** SUSTAINABLE SOLUTIONS.

# New T1 Overall Project Scope

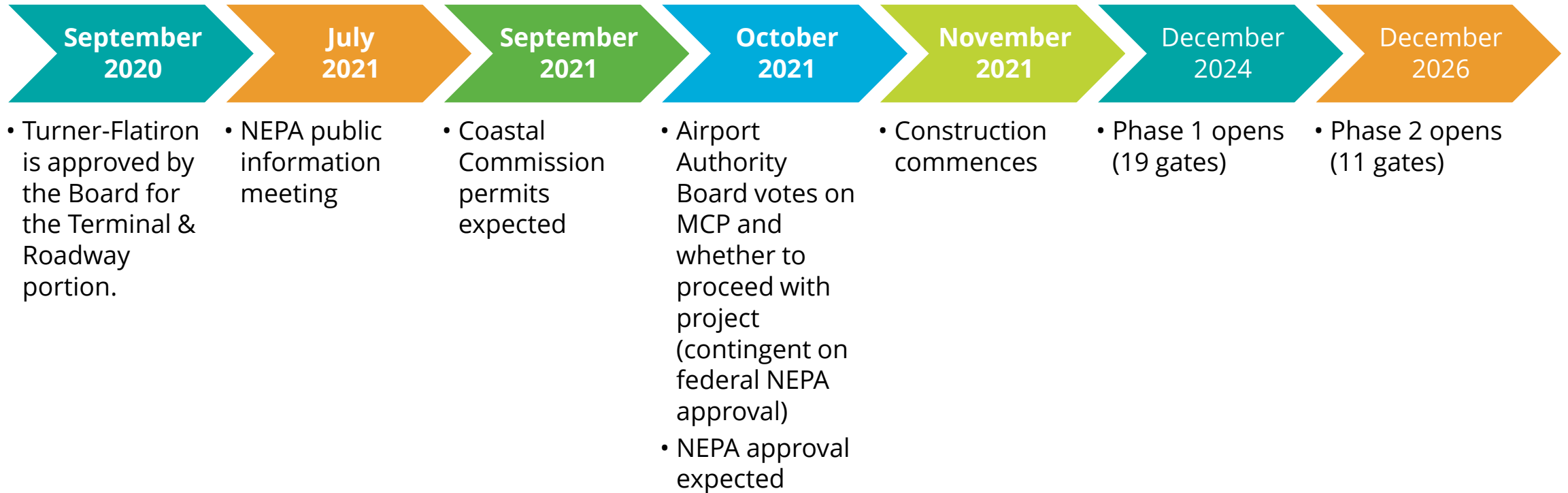


-  Package 1 – Terminal & Roadways
-  Package 2 – Airside Improvements
-  Package 3 – Administration Building
-  Future Transit Station

# New T1 Components



# New T1 Timeline



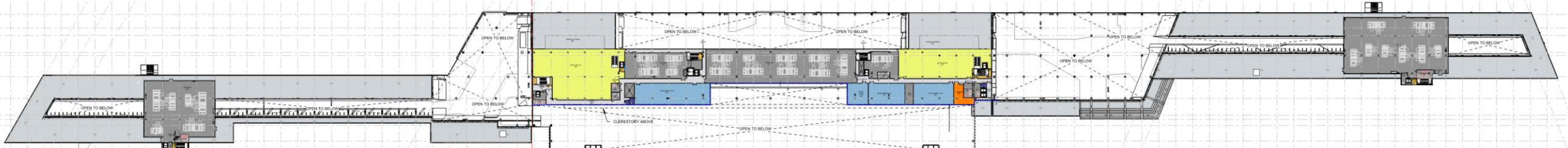


NEW  
T1

# Preliminary Concession Opportunities

# New T1

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92



WEST CLUB ROOM

EAST CLUB ROOM

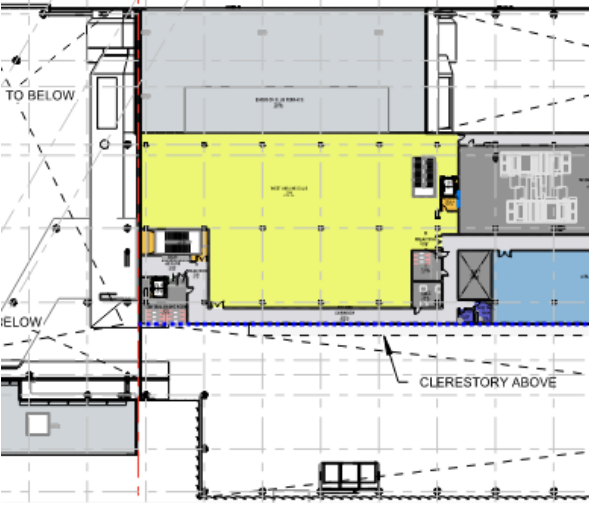
3 LEVEL 3 - COLOR PL  
SCALE: 1"=80'

2 P3 01 02 03 04

30 31 32 33 34 35 36 37 38 39

D1 D2

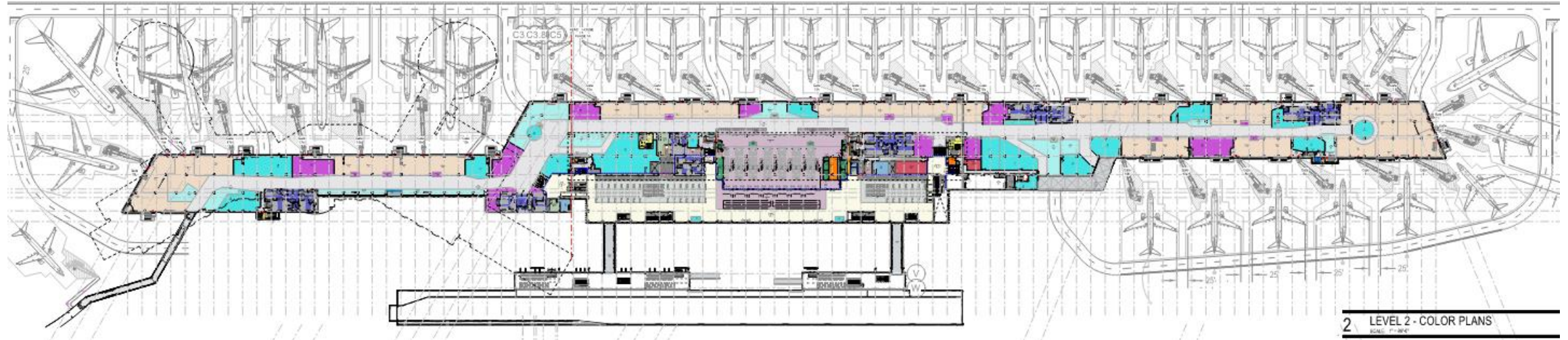
53 54 55 56 57 58 59 60 61 62



## L3 - CLUB

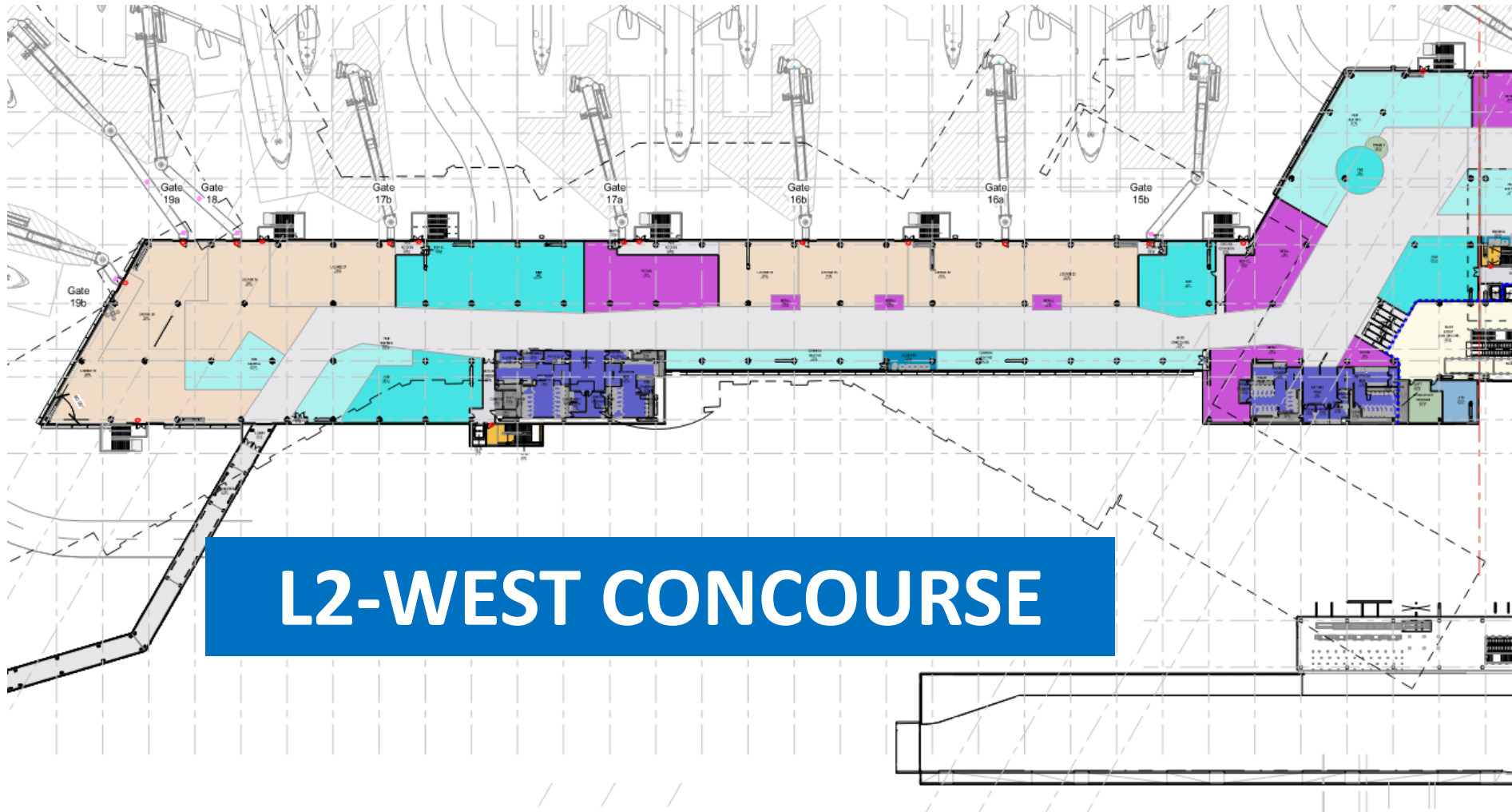


# New T1



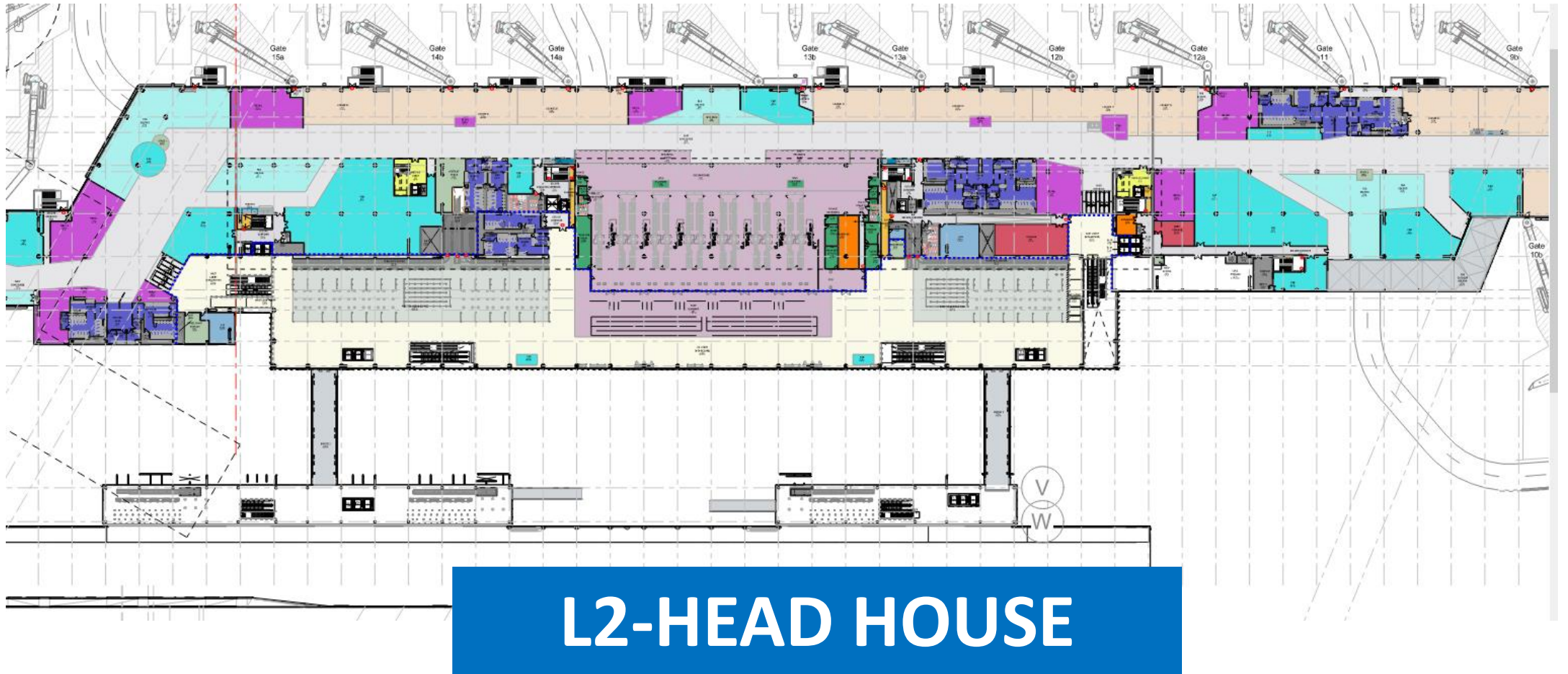
## L2 - DEPARTURES

# New T1



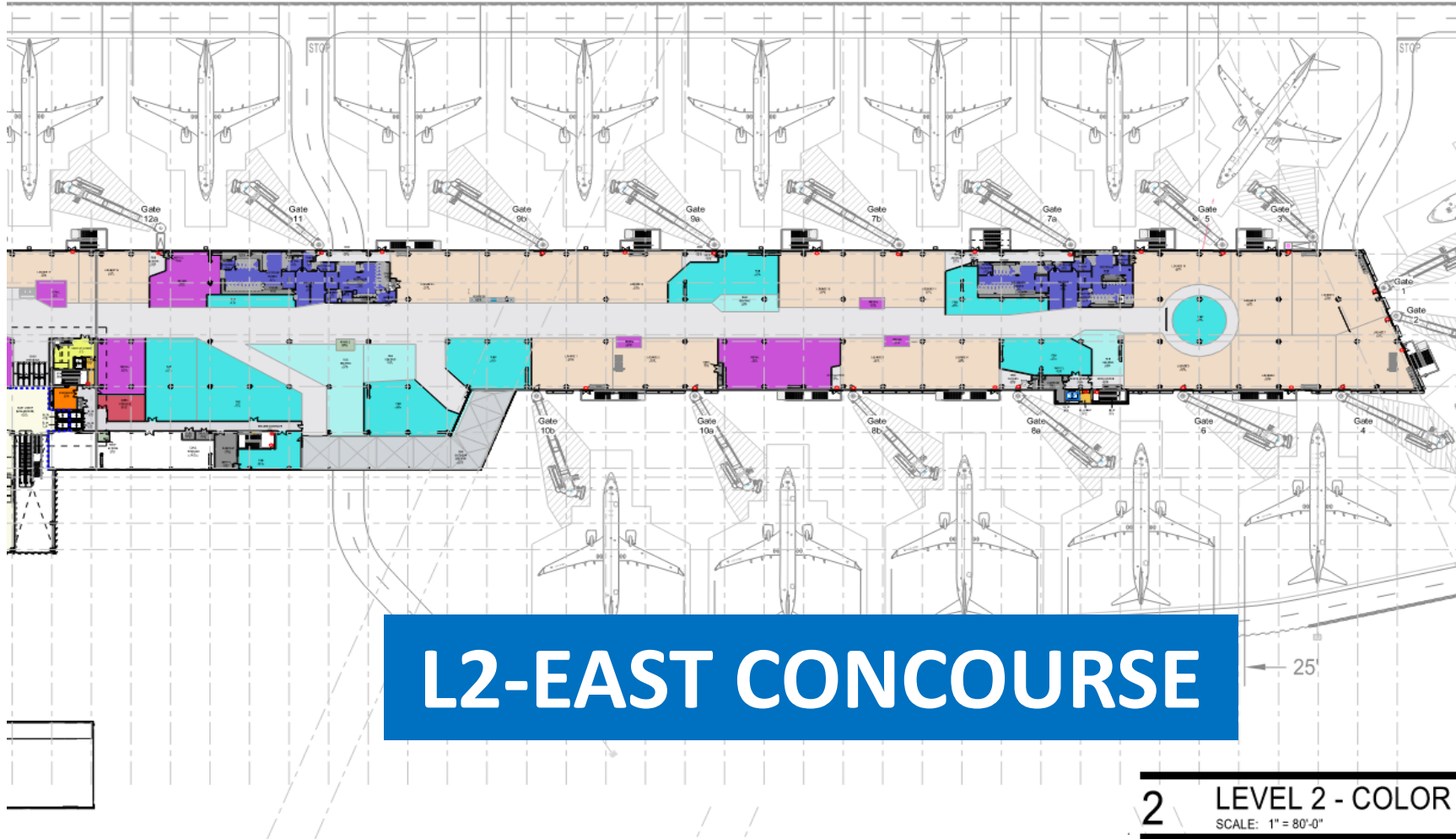
**L2-WEST CONCOURSE**

# New T1

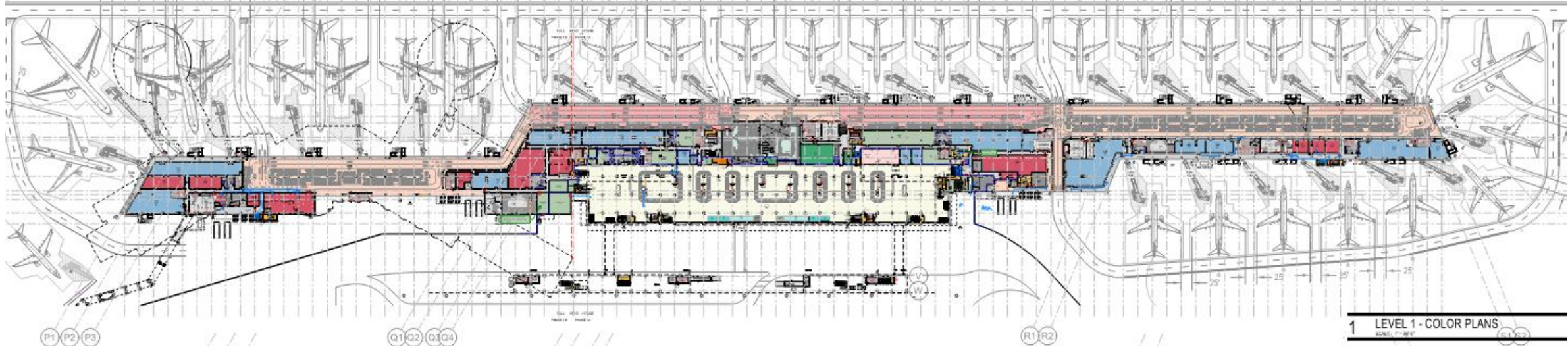


## L2-HEAD HOUSE

# New T1

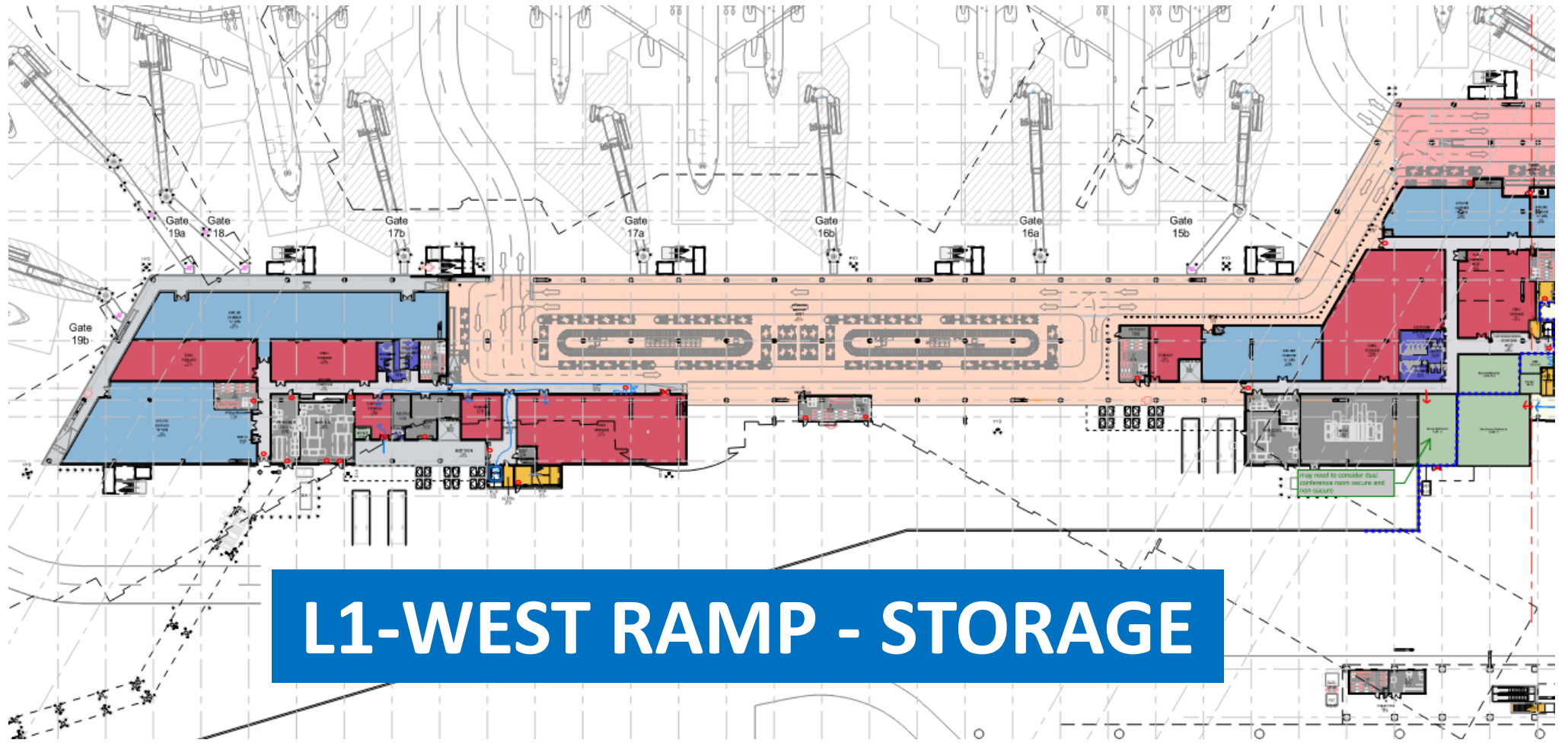


# New T1



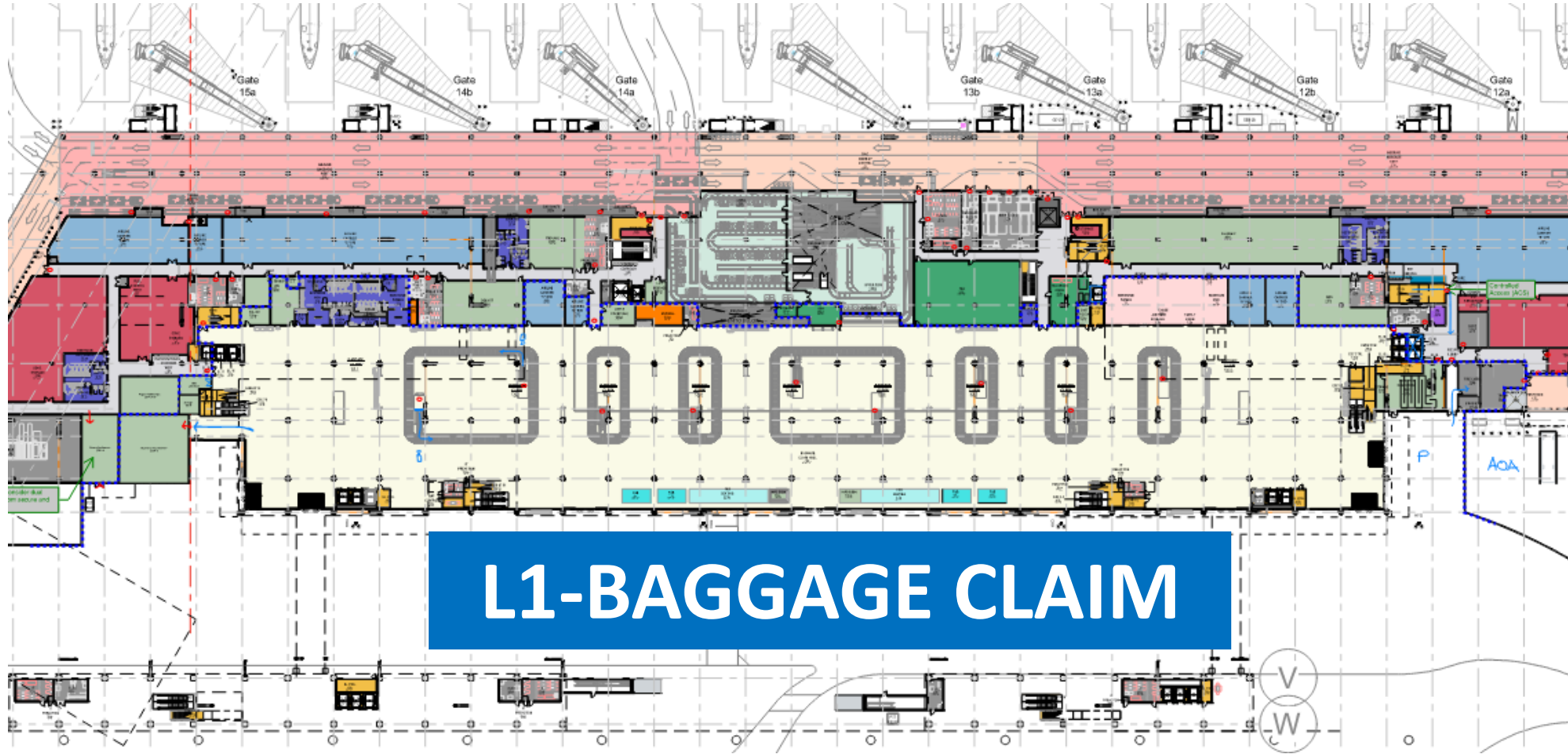
## L1 – RAMP -ARRIVALS

# New T1



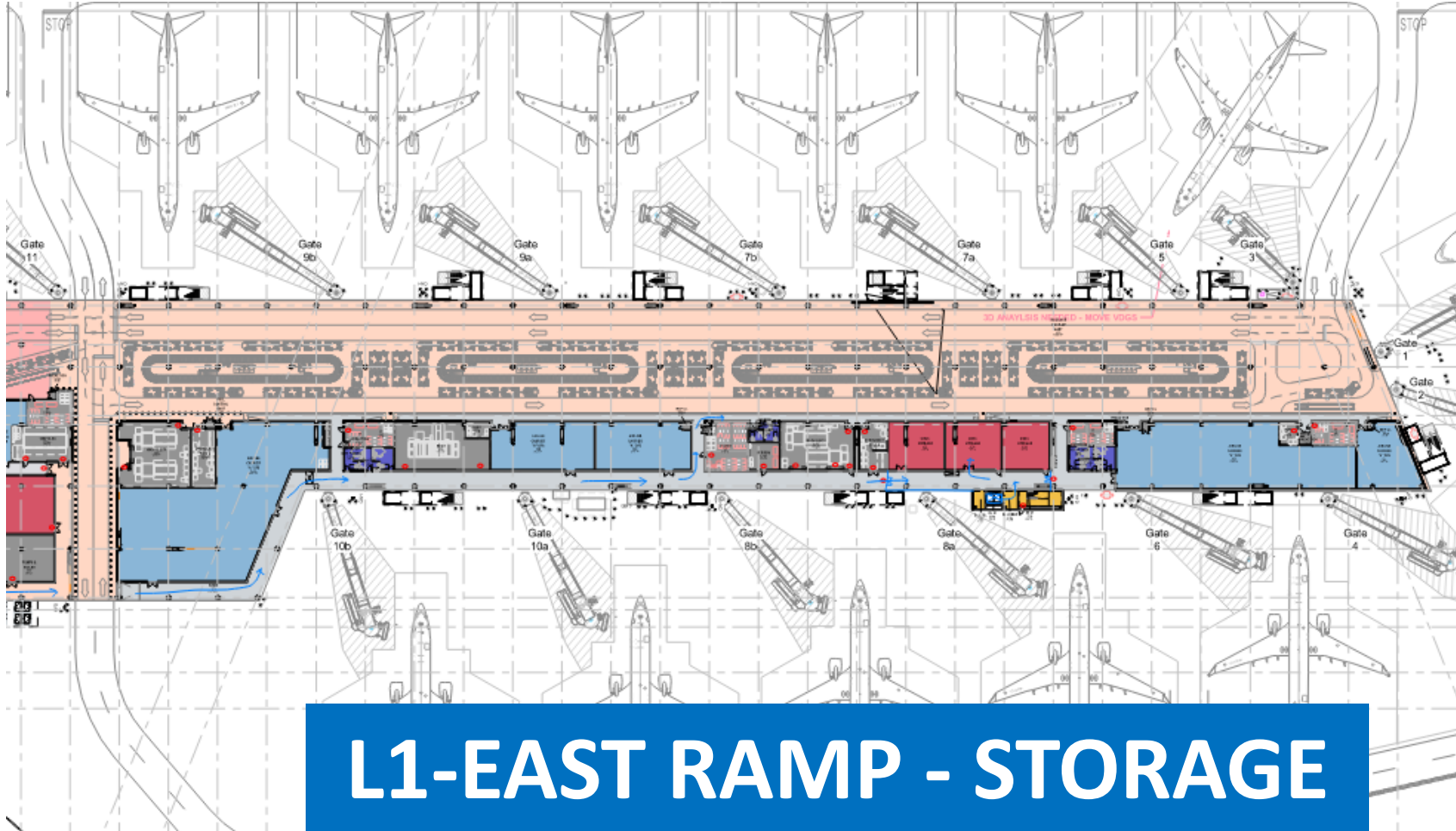
**L1-WEST RAMP - STORAGE**

# New T1



**L1-BAGGAGE CLAIM**

# New T1



## L1-EAST RAMP - STORAGE



# New T1 Concession Opportunities

## NEW T1 Concession Recap (Preliminary)

	Food & Beverage	Retail	Clubs
Square footage	52,127	25,078	20,000
No. of spaces	20	21	1 common, 1 airline

# New T1 Concession Opportunities

## SAN New T1 Concession RFP Timeline(Preliminary)

Task	Preliminary Dates
RFP Process	1/2023-9/2023
Plan Review and Permitting	
Phase 1	10/2023-7/2024
Phase 1b	10/2025-7/2026
Construction	
Phase 1	7/2024-12/2024
Phase 1b	7/2026-12/2026

# Terminal 2 Retail Concession Opportunities

# Terminal 2 Retail Concession Opportunities

- Current retail concessions have been in place since 2013
- Most retail concession leases expired in 2020
- Terminal 2 consists of two terminals, Terminal 2 East and Terminal 2 West
  - Terminal 2 East currently has American and Alaska as airlines
  - Terminal 2 West currently has Delta, United and international carriers as airlines

# Terminal 2 Retail Concession Opportunities

## Terminal 2 Retail Concession Opportunities Recap

	<b>Retail Concessions</b>
Square footage	13,500
No. of spaces	21

# Terminal 2 Retail Concession Opportunities

## Terminal 2 Retail Concession RFP Timeline(Preliminary)

Task	Dates
RFP Research/Outreach	11/1/2021-3/1/2022
RFP process	3/1/2022-8/1/2022
Lease execution	9/1/2022
Plan Review and Permitting	9/1/2022-8/1/2023
Construction	8/1/2023-7/1/2024

# Terminal 2 Food & Beverage(F&B) Concession Opportunities

# Terminal 2 F&B Concession Opportunities

- Current F&B concessions have been in place since 2013
- Most F&B concession leases expire in 2023 and 2024
- Terminal 2 consists of two terminals, Terminal 2 East and Terminal 2 West
  - Terminal 2 East currently has American and Alaska as airlines
  - Terminal 2 West currently has Delta, United and international carriers as airlines



# Terminal 2 F&B Concession Opportunities

## Terminal 2 F&B Concession Opportunities Recap

	F&B Concessions
Square footage	28,664
No. of spaces	25

# Terminal 2 F&B Concession Opportunities

## Terminal 2 F&B Concession RFP Timeline(Preliminary)

Task	Dates
RFP Research/Outreach	11/1/2021-3/1/2022
RFP process	3/1/2022-8/1/2022
Lease execution	9/1/2022
Plan Review and Permitting	9/1/2022-10/1/2023
Construction	10/1/2023-7/1/2024

# Questions?

Jim DeCock, Director(interim)  
Revenue Generation & Partnership Development  
San Diego International Airport  
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# Meet the Primes



## THANK YOU

**Schedule for Thursday,  
Sept. 23, 2021 5pm-7pm PST:**

**San Diego Int'l Airport Department Session**

Hear from:

- **Airport Design & Construction**  
(New T1, Capital Improvement Program and future opportunities)
- **Customer Experience & Innovation**  
(Future opportunities and program)
- **Procurement**  
(Procurement process and solicitation types)
- **Facilities Management**  
(Future opportunities)