

2018 Retrospective

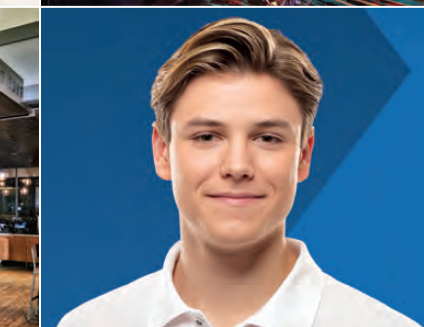


Delaware
North.



DELAWARE NORTH 2018 RETROSPECTIVE

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What's Next Happens Now

Delaware North's vision is clear — **“To delight guests by creating the world's best experiences today while reimagining tomorrow.”** This straightforward statement embodies our company's consistent and continuous drive to provide world-class experiences in unforgettable settings, with our customers always at the heart of everything we do.

As a company that is proud to be family owned, Delaware North has been built on integrity, hard work and humility, while maintaining a steadfast commitment to growth across all lines of business. And while we are always looking toward what's next, this retrospective serves as a great opportunity to reflect on some recent milestones in our company's long history.

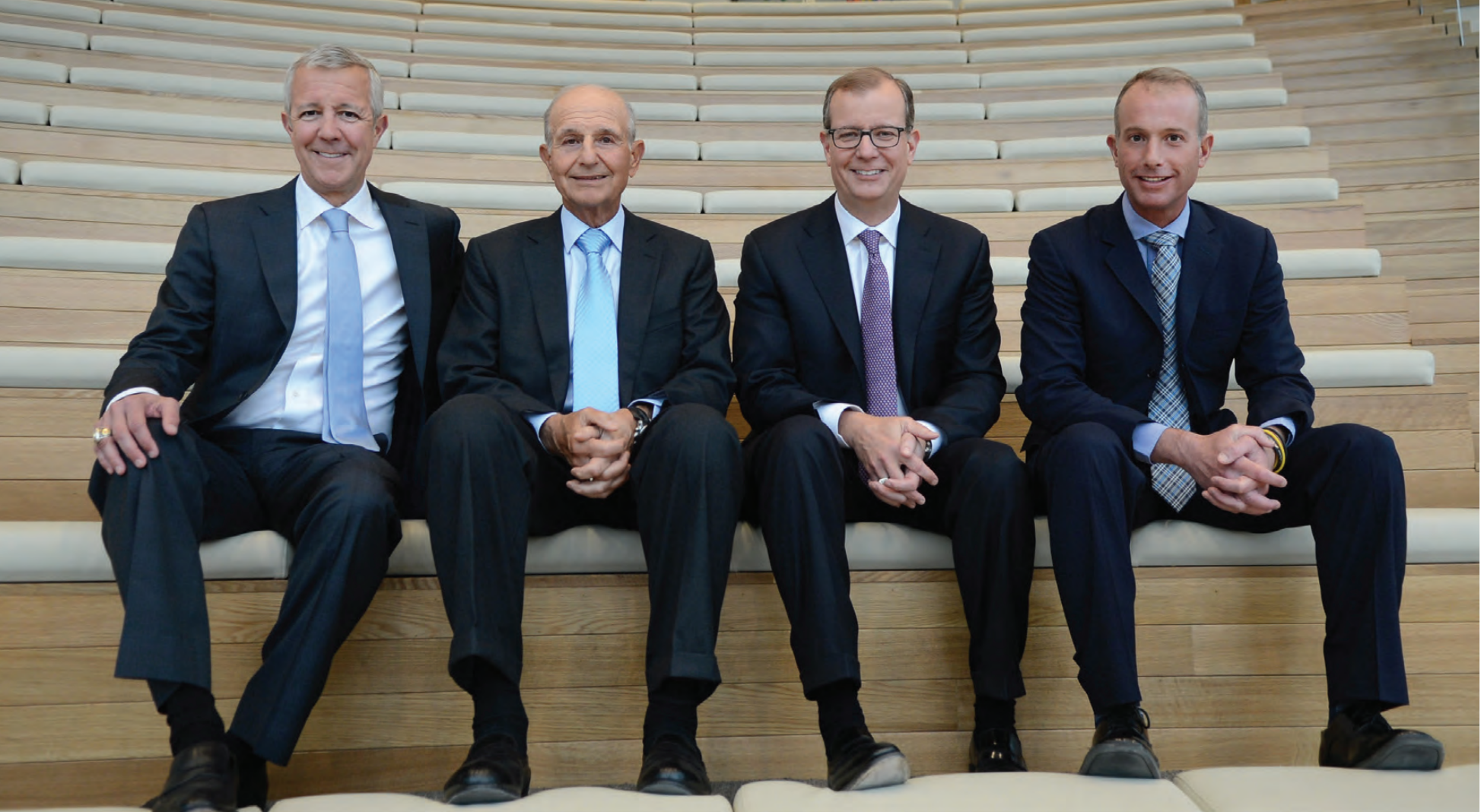
Of course, everything that we have accomplished is possible because of our dedicated team of 55,000 Delaware North associates and network of valued clients around the world. They inspire and remind us every day to **Lean Forward, Come Together, Stand Up, Do Right** and **Think Guest**. As a company, we will continue to live by these values, and we look forward to sharing many more exciting stories with you in the years ahead.

Jeremy M. Jacobs
Chairman
Delaware North

Jeremy M. Jacobs Jr.
Co-Chief Executive Officer
Delaware North

Louis M. Jacobs
Co-Chief Executive Officer
Delaware North

Charles M. Jacobs
Chief Executive Officer
Delaware North's
Boston Holdings



Lou Jacobs, Jeremy M. Jacobs, Jerry Jacobs Jr., Charlie Jacobs

About Delaware North

Delaware North is one of the largest privately-owned-and-operated hospitality companies in the world — a symbol of stability and reliability for over 100 years, and a testament to our ability to evolve and adapt in an ever-changing marketplace.

Whether you are a fan, traveler, visitor or guest, chances are very good that you've enjoyed memorable moments personally delivered by our company.

Serving more than a half-billion guests annually, our associates are dedicated to creating special experiences worldwide at high-profile places such as sports and entertainment venues, national and state parks, destination resorts and restaurants, regional gaming operations, and airports and travel hubs.

Our more than \$3 billion enterprise stems from our family of operating divisions. While each operates as a singular entity with expertise in its industry, they also contribute to our collective think tank of hospitality leadership. The outcome is a progressive company that shares insights, best practices and resources across more than 200 operating locations in North America, the United Kingdom, Australia, New Zealand and Singapore.



\$3B+ revenue



100+ years family owned and operated



200+ locations operating across four continents



55,000 associates globally



500M guests served annually



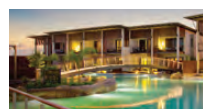
1,000+ food and beverage outlets



300+ brands and concepts



350+ retail locations



4,000+ lodging rooms



11,000+ gaming machines

One Vision. One Mission.

OUR VISION

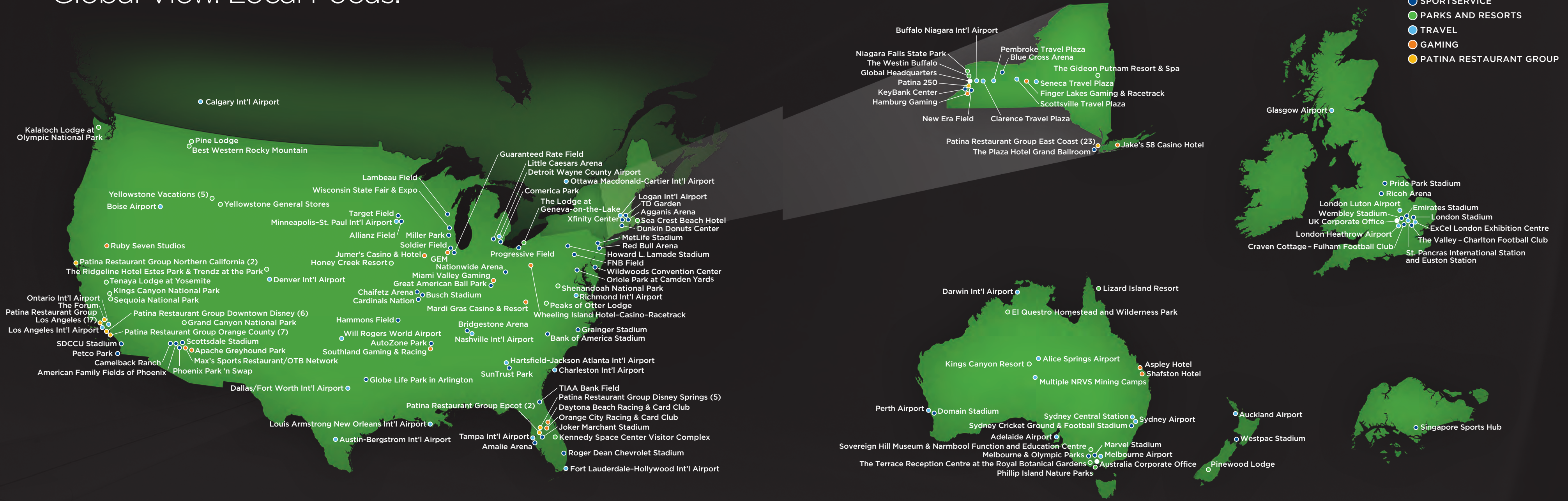
To delight guests by creating the world's best experiences today while reimagining tomorrow.



Global View. Local Focus.

Our Locations

- SPORTSERVICE
- PARKS AND RESORTS
- TRAVEL
- GAMING
- PATINA RESTAURANT GROUP



A Year in Review

Grounded in a refreshed vision, newly articulated values, and ambitious growth goals, Delaware North charted a course for sustained success in 2018 and a bright future for the years ahead. New acquisitions and continued investments in its existing business touched every one of Delaware North's divisions across four continents.



Delaware North begins operating at New Zealand's Westpac Stadium. *Page 20*



Another record-breaking Australian Open. *Page 19*



More than 200 associates participate in the WNY United Way Day of Caring. *Page 77*



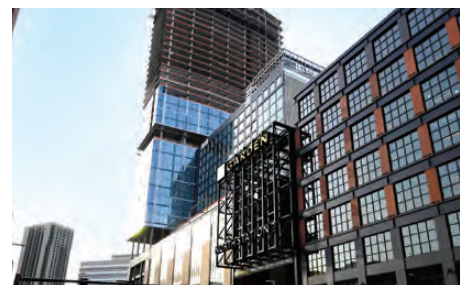
Patina caters MTV Movie & TV Awards and three Emmy Awards Governors Ball events. *Page 55*



Delaware North acquires Mardi Gras Casino & Resort. *Page 36*



Patina opens four new restaurants in Disney Springs. *Page 52*



TD Garden announces \$100m expansion. *Page 12*



The Astronaut Training Experience® (ATX) attraction opens at Kennedy Space Center Visitor Complex. *Page 24*



Little Caesars Arena debuts with high acclaim in Detroit. *Page 16*



The Hub on Causeway is "topped off." *Page 10*



Rathbun Lake Aquapark introduced at Honey Creek Resort. *Page 31*



Gideon Putnam reopens after flooding and renovations. *Page 30*



Delaware North begins operations at the UK's Ricoh Arena. *Page 21*



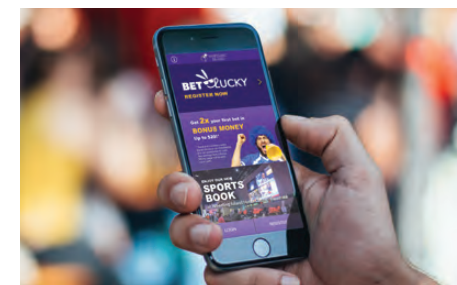
Delaware North expands Boston footprint with Logan Airport contract. *Page 47*



Chairman & CEOs introduce refreshed Vision, Values and Goals. *Page 2*



Minnesota United selects Delaware North as new food and beverage partner. *Page 22*



Delaware North partners with Mionni Gaming to offer sports wagering. *Page 41*



Delaware North hosts global Associate Appreciation Week. *Page 58*



Delaware North announces agreement to acquire casino and resort in Australia. *Page 34*



Rock band KISS helps open Rock & Brews at Ontario International Airport. *Page 46*



Boston Holdings

Delaware North is one of the United States' premier providers of world-class entertainment and hospitality experiences, as evidenced by our Boston Holdings. As the owner/operator of TD Garden, we serve more than 3.5 million visitors each year. Home of the NHL's Boston Bruins — owned by Delaware North Chairman Jeremy Jacobs since 1975 — and the NBA's Boston Celtics, TD Garden is also a frequent stop for top music entertainers.

A NEW HUB ON CAUSEWAY STREET

The Hub on Causeway — a multiphased, mixed-use, 1.6 million-square-foot joint venture development between Delaware North and Boston Properties — is an ambitious project set to transform the West End neighborhood of Boston.

Construction on the project is well on its way, with Phase I — which includes 200,000 square feet of retail, entertainment, and food and beverage space, plus 175,000 square feet of creative loft office space — set to open in fall 2019.

Phase II, a 440-unit residential tower and 269-room hotel, is expected to begin occupancy shortly thereafter. The hotel will be a citizenM flag, a Netherlands-based chain known for its affordable luxury, and the first of its kind in Boston.

The final phase is expected to open in summer 2021. Phase III is an office tower with 627,000 square feet of space, of which anchor tenant Verizon has already signed a lease to occupy 70 percent.



The Hub on Causeway | Boston

The Hub on Causeway construction | Boston



New TD Garden entrance | Boston

THE GARDEN GROWS

In concert with The Hub on Causeway development, Delaware North is capitalizing on a once-in-a-lifetime opportunity to transform the company-owned-and-operated TD Garden with plans to expand the building and introduce new products and amenities. The 50,000-square-foot, \$100 million addition will add concessions, improve club areas, increase seating and add a front door to TD Garden.

The extensive renovations will touch every level of the arena and include both transformational and foundational amenities. Fan-friendly additions will include expanded concourses; new suites, clubs, and bars; and new food options that include a market and food hall.

Equally important are the foundational improvements. Refurbishments will be made to the arena's back-of-house operations, premium lobbies and facilities for the building's tenants — the NHL's Boston Bruins and NBA's Boston Celtics — and the media. Additional restrooms, first aid and guest services will also be added.

Along with the renovations comes the launch of Boston Garden Society — a new brand and redefinition of the pre-existing TD Garden Premium Club. Twenty years ago, TD Garden set the stage for the premium arena experience and continues its first-class efforts by introducing Boston's newest, oldest sports and social club.

Boston Garden Society signifies the community of passionate fans and Boston's unique role as a hub of sports, and celebrates the rich history of the arena. It's a commitment to a new tradition of sports and entertainment for the Boston business community and beyond, coming in the form of

Both the NHL's Boston Bruins and the NBA's Boston Celtics finished the regular season in second place in their respective conferences.

transformed spaces (Society Kitchen & Tap, 1928 Club, Rafters and Rafter Studios) as well as upgraded amenities and experiences over the next few years. This membership-based model is designed to offer flexible and customizable entertainment and hospitality options.

A WINNING TRADITION

The two famed tenants of the Delaware North-owned-and-operated TD Garden enjoyed similar success in their 2017-18 seasons.

Both the NHL's Boston Bruins and the NBA's Boston Celtics finished the regular season in second place in their respective conferences. The Bruins bowed out in the second round of the Stanley Cup Playoffs to the top-seeded Tampa Bay Lightning, and the Celtics were edged by the Cleveland Cavaliers in the Eastern Conference Finals.

The Bruins began what promises to be another successful campaign in 2018-19, with the core of their lineup returning as well as the continued development of promising young players. Meanwhile, the Celtics are again one of the most exciting young teams in the NBA.

TD Garden also had a record breaking year, hosting 45 shows and concerts in 2018.



TD Garden | Boston



Boston Bruins Foundation makes \$1 million donation to Special Olympics Massachusetts

THE BRUINS FOUNDATION MAKES \$1M GIFT

The Boston Bruins Foundation announced in August 2018 that it will donate \$1 million over the course of the next three years to Special Olympics Massachusetts as part of a new partnership between the two organizations. The gift is the largest donation by the Boston Bruins Foundation to date.

Beyond the \$1 million commitment, the Bruins Foundation and Special Olympics Massachusetts have joined forces to involve Special Olympics athletes in a variety of initiatives to promote inclusion and

overall health and wellness. The annual Boston Bruins Foundation golf tournament in September marked the start of the partnership, highlighted by a ceremonial tee shot featuring Special Olympics silver medalist Tyler Lagasse.

Special Olympics athletes were also in attendance on opening night of the Bruins' 2018-19 campaign. The athletes in attendance took part in an array of experiences such as bench assistants, high-five lines, and ice resurfacer rides. The Bruins have and will continue to highlight Special Olympics athletes in games throughout the season.



TD GARDEN DONATED
4,000
 BACKPACKS
 TO STUDENTS AND
\$10,000
 TO THE BOSTON PUBLIC
 SCHOOL SYSTEM

GARDEN NEIGHBORHOOD CHARITIES CONTINUES TO GIVE BACK

TD Garden's philanthropic arm, Garden Neighborhood Charities, continued a pair of well-received annual events. In August 2018, the Delaware North-owned-and-operated TD Garden hosted and donated backpacks to 4,000 Boston-area students and made a \$10,000 donation to the Boston Public Schools.

In November, the organizations teamed up for the Table of Friends dinner, which kicked off the holiday season for the 23rd consecutive year.

Volunteers from TD Garden, the Boston Bruins and Boston Celtics were joined by local government officials in welcoming more than 1,000 guests from Boston's homeless shelters to TD Garden's arena floor for the meal, which was prepared by the Delaware North Sportservice team at the arena. The traditional Thanksgiving spread included 700 pounds of turkey, 500 pounds of stuffing, 350 pounds of vegetables, 10 gallons of cranberry sauce and a 500-pound pumpkin pie.

Garden Neighborhood Charities also donated thousands of personal care items to guests at the dinner and to local homeless shelters. In addition, it made a gift of \$5,000 to the Friends of Boston's Homeless organization.



TD Garden's Table of Friends Dinner



Lambeau Field | Green Bay, Wis.



Busch Stadium | St. Louis, Mo.



Singapore Sports Hub | Kallang, Singapore

Sportservice

Delaware North Sportservice is a global leader in sports hospitality, serving fans since 1915. We provide expertise in concessions, premium dining, event catering and retail in more than 50 stadiums, ballparks and arenas in the United States, United Kingdom, Australia and Asia. That includes Lambeau Field, Busch Stadium and MetLife Stadium in the United States, along with Wembley Stadium in London, Melbourne & Olympic Parks in Australia and the Singapore Sports Hub.

LITTLE CAESARS ARENA DEBUTS WITH HIGH ACCLAIM IN DETROIT

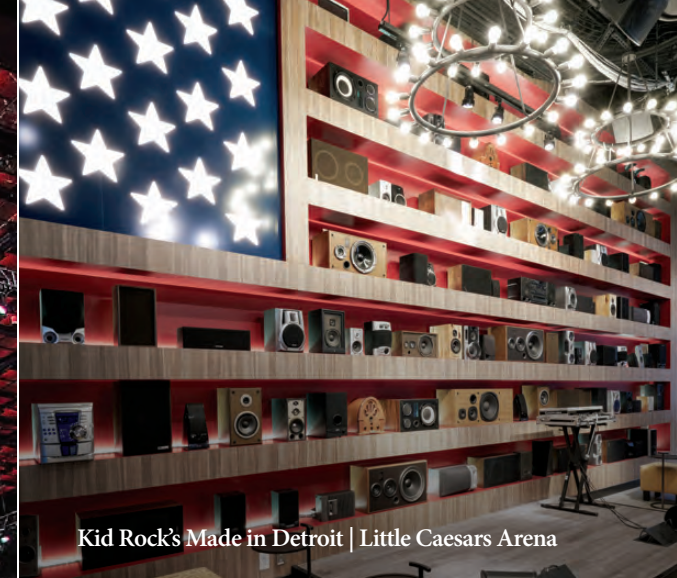
Hailed by *SportsBusiness Journal* as its 2018 Sports Facility of the Year, Little Caesars Arena in Detroit has reason to boast. The state-of-the-art arena, which opened in 2017 as the new home of the NHL's Red Wings and the NBA's Pistons, is an integral part of Detroit's downtown resurgence and is the centerpiece of the new District Detroit neighborhood, which is one of the largest sports and entertainment developments in the country.

At Little Caesars Arena, Delaware North Sportservice provides a full accompaniment of services to the 20,000-seat venue, including concessions at more than 50 stands, premium dining in seven club areas, 24 loge boxes, 66 suites, and two rows of one-of-a-kind gondola seating that hang from the arena's rafters.

In addition to operating a 9,500-square-foot retail store, Delaware North also partnered with rock musician Kid Rock to open a street-side restaurant, Kid Rock's Made in Detroit, and a food hall-style dining experience, the District Market (both of which are open year-round).



Little Caesars Arena | Detroit



Kid Rock's Made in Detroit | Little Caesars Arena



District Market | Little Caesars Arena



SunTrust Park | Atlanta

SunTrust Park’s inaugural season was a great success, opening to critical acclaim and being named “Ballpark of the Year” by *Ballpark Digest*.

SETTING A NEW BAR AT SUNTRUST PARK

Delaware North was a key player as the Atlanta Braves began a new chapter in the team’s history at their new home, SunTrust Park. The inaugural 2017 season proved to be a great success, with the ballpark opening to critical acclaim and being named “Ballpark of the Year” by *Ballpark Digest* in 2018.

The honor was earned in part by Delaware North Sportservice and its forward-thinking food and beverage operations at the state-of-the-art ballpark. Delaware North Sportservice covered all the bases when creating its plans for concessions and premium dining options at the ballpark, providing regionally inspired, fan-favorite dishes using local ingredients and companies. Regional favorites such as Waffle House, Chick-fil-A and Fox Bros. Bar-B-Q have a presence within the ballpark, along with an array of local vendors and innovative concessions concepts.

A partnership with Georgia-based Terrapin Beer Co. also led to the creation of the Terrapin Taproom, a street-side microbrewery and restaurant connected to the ballpark that’s open to the public on non-game days.



Terrapin Taproom | SunTrust Park



DELAWARE NORTH SERVES RECORD-BREAKING YEAR AT THE AUSTRALIAN OPEN

After the final volleys were played and the championship trophies raised, another winner emerged at the 2018 Australian Open: Delaware North, which operates food and beverage services at the annual tennis tournament.

The two-week event drew a record 743,667 fans to Melbourne & Olympic Parks, besting last year’s attendance by nearly 15,000. Food and beverage sales followed suit, with those fans accounting for a record number of corporate meals, hot chips, burgers, sushi rolls and pizzas — just to name a handful.




**RECORD-SETTING
743,667
FANS
SERVED AT THE
AUSTRALIAN
OPEN**



Australian Open | Melbourne & Olympic Parks



Westpac Stadium | Wellington, New Zealand

DELAWARE NORTH SELECTED AS FOOD AND BEVERAGE PARTNER AT NEW ZEALAND STADIUM

In early 2018, the Wellington Regional Stadium Trust appointed Delaware North as a food and beverage partner at the 34,500-seat Westpac Stadium in Wellington, New Zealand.

Delaware North has partnered with Wellington Hospitality Group to manage and deliver catering services at the stadium, which is home of both the Wellington Lions and Wellington Hurricanes rugby teams. The multipurpose venue also hosts cricket and soccer matches, and concerts.

“Delaware North is one of the leading hospitality service providers in the world and boasts a high-caliber resume of clients and a great reputation for success,” said Westpac Stadium CEO Shane Harmon. “We look forward to working together to create new and innovative hospitality offerings that will enhance the experience for all our patrons here at Westpac Stadium.”

CATERING ATHLETES’ VILLAGE DURING THE COMMONWEALTH GAMES IS A MASSIVE EFFORT

Delaware North served more than 21,000 meals — around the clock — as the catering and hospitality partner at Athletes’ Village during The Gold Coast 2018 XXI Commonwealth Games in Australia.

The event, which took place April 4-15, 2018, featured about 6,600 athletes and officials from 71 nations and territories competing in 18 sports and para sports. The cumulative television audience exceeded 1 billion people, along with hundreds of thousands of live spectators.

The Athletes’ Village, where Delaware North operated food service, was in the suburb of Southport, Gold Coast. It was part of the Parklands Project, which incorporated a residential area of approximately 1,250 permanent dwellings, comprising 1,170 apartments and 80 townhouses that provided accommodations and services to all the athletes and officials during the games.

Delaware North’s catering services were delivered to the following areas located within various zones of the Athletes’ Village:

- Main Dining Hall
- Casual Dining
- Resident Centre Cafés
- Athletes Lounge & Games room
- Village Heart Juice Bar

DELAWARE NORTH APPOINTED AS CATERING AND HOSPITALITY PARTNER AT RICOH ARENA AND ITS HOTEL

Delaware North in July 2018 commenced a 20-year contract to operate catering and hospitality services at Ricoh Arena in Coventry, England. Included in the venue is a DoubleTree By Hilton hotel, which is also operated by Delaware North — marking the company’s entry into the lodging business in the United Kingdom.

Home to Premiership Rugby’s Wasps, Wasps Netball and Coventry City Football Club, the venue hosts about 1.6 million visitors annually and includes the Erickson Exhibition Hall, meeting rooms, two restaurants, a hotel and a casino (not operated by Delaware North).

“This is a landmark deal for Wasps Group and the start of a long relationship with Delaware North, which has shown enormous confidence in both Ricoh Arena and the quality of the region’s staff,” said Nick Eastwood, chief executive of Wasps Group.

“The company has an outstanding reputation for quality and service and works with some of the biggest venues in sport, leisure and business.”



DELAWARE NORTH
SERVED
MORE THAN
21,000
MEALS AT THE
COMMONWEALTH
GAMES IN 2018.



Commonwealth Games | Gold Coast



Ricoh Arena | Coventry, England



1919 Kitchen & Tap at Lambeau Field | Green Bay, Wis.



Sledding hill and ice skating rink in the Packers' Titletown District | Green Bay, Wis.



Allianz Field | St. Paul, Minn.

TITLETOWN ENHANCES EXPERIENCE AT PACKERS' LAMBEAU FIELD

Delaware North's services at Lambeau Field in Green Bay, Wis., extend far beyond Packers' game days in the fall.

In addition to operating the 300-plus seat 1919 Kitchen & Tap, which is open year-round inside the stadium, Delaware North now helps to operate part of the Packers' Titletown District, a new, interactive community development that offers restaurants, lodging, retail and other entertainment programming to attract visitors beyond the traditional football season.

Within Titletown, Delaware North operates 46 Below, a full-service restaurant named after the legendary 1967 NFL Championship game at Lambeau Field, during which the temperature plummeted to 46 degrees Fahrenheit below zero.

Delaware North also operates seasonal programming and special events that include a sledding hill and ice skating rink, as well as Johnsonville Tailgate Village, a 13,242-square-foot venue with a full

kitchen, spacious bar and 4,300-square-foot party deck that hosts pregame parties and concerts throughout the year.

A TWIN CITIES TRIPLE PLAY

With existing operations at Target Field, home of MLB's Minnesota Twins, and Minneapolis-St. Paul International Airport, Delaware North in 2018 was awarded a contract for a third venue in the Twin Cities. Allianz Field, home to Major League Soccer's Minnesota United FC, is currently under construction and scheduled to open for the 2019 MLS season.

As the food and beverage partner, Delaware North Sportservice will service Allianz Field's four clubs, 22 suites and a variety of concessions outlets in the stadium with a capacity for 19,400 fans.

Delaware North will feature a wide selection of local and ethnic flavors, and the north end of the stadium will boast a large brew pub — stretching the width of the pitch — with 96 taps, including local craft beers.



Target Field | Minneapolis



Minneapolis-St. Paul International Airport



Grand Canyon National Park | Arizona



Kennedy Space Center Visitor Complex | Cape Canaveral, Fla.



Niagara Falls State Park | Niagara Falls, N.Y.

Parks and Resorts

Delaware North provides a wide range of services, including lodging, food and beverage, retail and recreation at many high-profile national and state parks and attractions, and destination resorts. Find us at Yellowstone and Grand Canyon national parks and at Kennedy Space Center Visitor Complex, to name a few. We also welcome you at our owned-and-operated hotels and resorts in some of the world's most stunning settings.

BRINGING THE MARS EXPERIENCE TO EARTH

The latest major attraction at Kennedy Space Center Visitor Complex focuses on immersing guests in experiences they might encounter on a mission to Mars.

The all-new Astronaut Training Experience® (ATX) Center Exploring with Lockheed Martin, which replaced an offsite venue and program, fully opened in spring 2018. It boasts the most high-tech, hands-on activities available at the visitor complex through two distinct programs: Astronaut Training Experience and Mars Base 1. Both feature immersive simulation technology to train participants to live and work on Mars using real NASA science to address engineering challenges.

Ahead of the ATX opening, the visitor complex

launched a Summer of Mars campaign in 2017, offering free admission for fifth-graders — thought to be the first age group that could produce astronauts to venture to Mars in the future. The campaign also featured a Mars rover concept vehicle that traveled to several East Coast locations, garnering significant national media exposure.

The visitor complex has also expanded opportunities for rocket launch viewing, selling out hundreds of special viewing packages for the historic SpaceX Falcon Heavy launch in February 2018.

All of the excitement and many other new attractions sparked record attendance, and NASA rewarded Delaware North in May 2017 with a contract extension to continue operating the visitor complex through 2028.



Kennedy Space Center Visitor Complex | Cape Canaveral, Fla.





Phillip Island Nature Parks | Australia

DELAWARE NORTH APPOINTED AS FOOD AND BEVERAGE PARTNER AT AUSTRALIA'S PHILLIP ISLAND NATURE PARKS

Delaware North in June 2017 was announced as the new food and beverage partner across all Phillip Island Nature Parks sites in Australia.

Phillip Island Nature Parks, about a 90-minute drive from Melbourne, Australia, was created by the State Government of Victoria in 1996 and comprises more than 1,805 hectares of Crown Land set aside under the Crown Land (Reserves) Act of 1978 “for the conservation of areas of natural interest or beauty or of scientific, historic or archaeological interest.”

The Nature Parks include five major attractions — the Penguin Parade, the Koala Conservation Centre, Churchill Island Heritage Farm, Wild Oceans EcoBoat Tours and the Antarctic Journey at the Nobbies Centre — along with other recreational areas such as beaches, wetlands and woodlands.

“A comprehensive and competitive tender process identified Delaware North’s extensive expertise and experience in running cafés, restaurants and functions in a wide range of venues,” said Jeff Floyd, chairman of Phillip Island Nature Parks.



WHAT’S OLD IS NEW AGAIN

Estes Park in Colorado is a memorable national park gateway town, framed by the nearby peaks of Rocky Mountain National Park and home to elk and other wildlife often seen walking along streets and lounging in front yards.

Delaware North recognized the town’s appeal when it purchased a hotel there in 2016 and immediately began a \$6 million renovation to give it a more contemporary design. Rebranded as The Ridgeline Hotel Estes Park, the hotel reopened in June 2017.

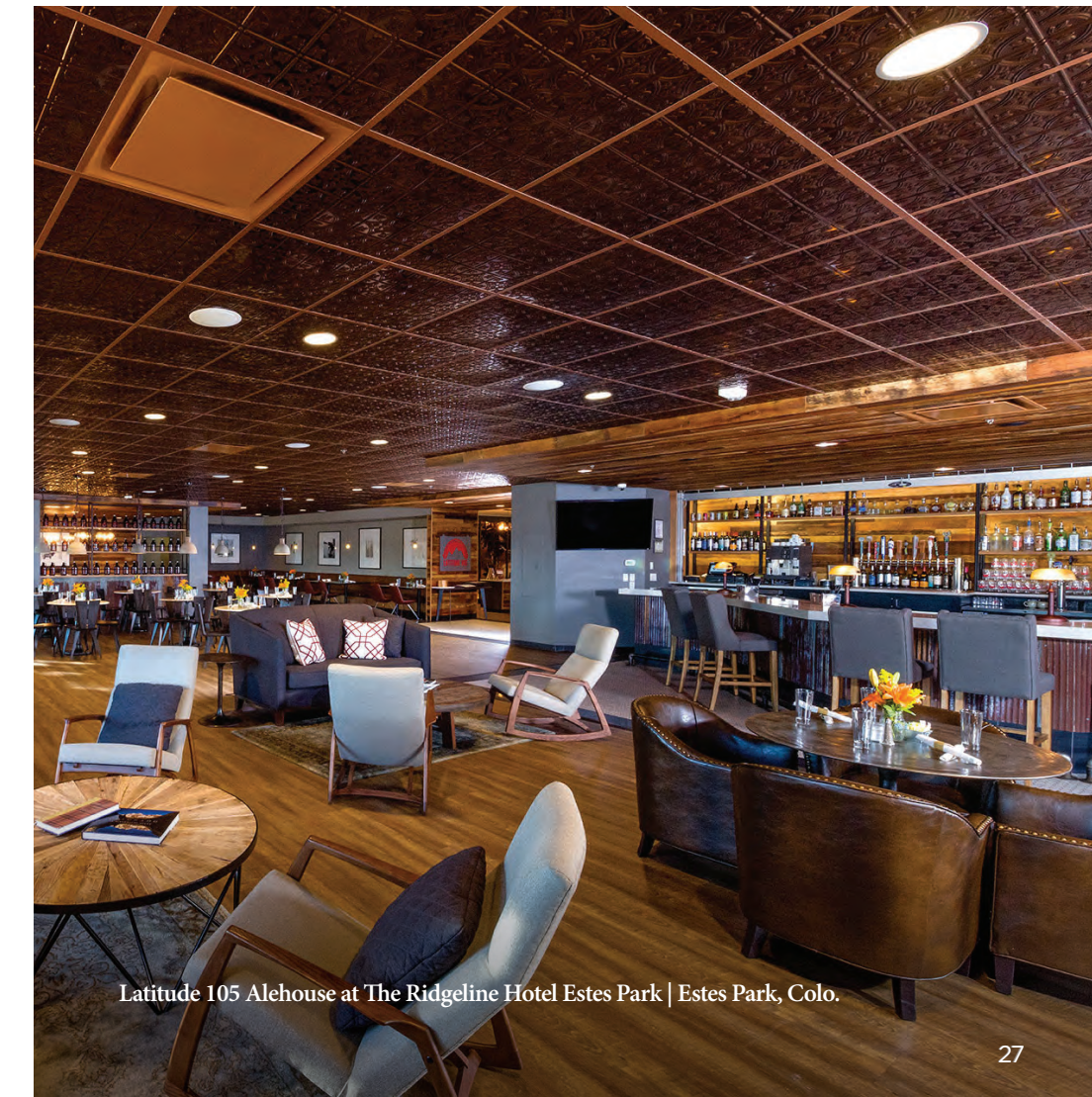
The lobby and indoor heated pool areas were refreshed, as well as the hotel’s 150 rooms. New additions include a state-of-the-art fitness center, gaming area and lobby elevator for easier room access. In 2018 the hotel added a new 16-passenger convertible bus for convenient and experiential tours of the nearby national park.

The hotel’s redesigned restaurant and bar, now known as Latitude 105 Alehouse, quickly became Estes Park’s new favorite hot spot thanks to its sophisticated mountain ambience and a new regionally inspired menu centered on a signature item: gourmet beef, elk and other burgers.

“Delaware North is proud of this investment in creating what is essentially a new hotel in The Ridgeline Hotel Estes Park — a premier lodging experience for visitors to Rocky Mountain National Park,” said Scott Socha, president of Delaware North’s parks and resorts business.

“Delaware North is proud of this investment in creating what is essentially a new hotel in The Ridgeline Hotel Estes Park — a premier lodging experience for visitors to Rocky Mountain National Park.”

SCOTT SOCHA
PRESIDENT OF DELAWARE NORTH'S
PARKS AND RESORTS BUSINESS



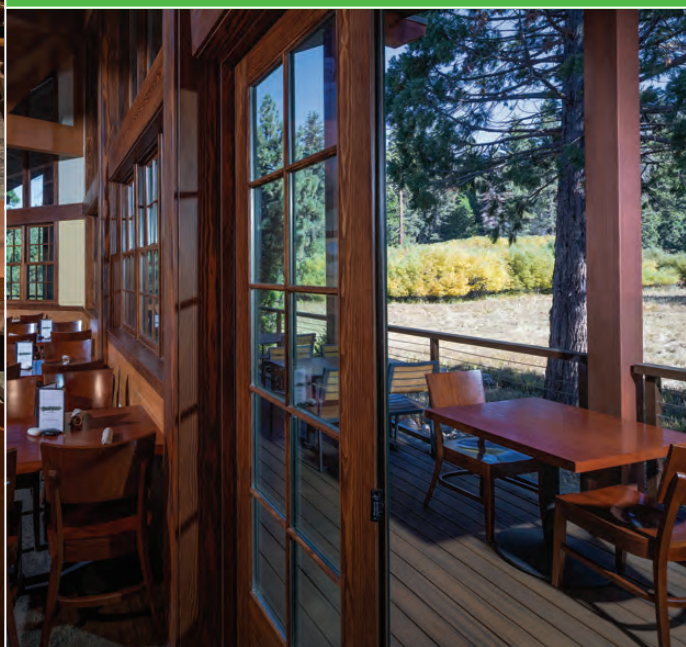
Latitude 105 Alehouse at The Ridgeline Hotel Estes Park | Estes Park, Colo.



Grant Grove Restaurant | Sequoia & Kings Canyon National Parks



GRANT GROVE RESTAURANT
\$6.3 MILLION
ECO-FRIENDLY
REDESIGN AND RECONSTRUCTION



STRIKING GOLD WITH A NEW NATIONAL PARK RESTAURANT

When the National Park Service (NPS) wanted a larger and more sustainable restaurant to replace one built in the 1970s at Grant Grove Village within Sequoia & Kings Canyon National Parks in California, Delaware North took on the difficult project as the parks' concessionaire.

The result was a beautiful new restaurant built with sustainable materials and construction techniques to achieve Leadership in Engineering and Environmental Design (LEED) Gold Certification from the U.S. Green Buildings Council. The \$6.3 million ecofriendly redesign and reconstruction culminated with the opening of the restaurant in June 2017.

“Today we recognize Delaware North for its central role in completing this new restaurant — a building that will support the experiences and adventures of the visiting public for years to come,” Woody Smeck, NPS superintendent of the two parks, said at a dedication ceremony.

The 8,000-square-foot restaurant accommodates about 225 diners in indoor and outdoor seating areas overlooking majestic giant sequoia trees framing an adjacent meadow.

“Our team used great care in safeguarding the surrounding natural environment and preserving the beautiful setting while enhancing the overall visitor experience,” said Scott Socha, president of Delaware North’s parks and resorts business.

The restaurant was also certified as a Green Restaurant® by the Green Restaurant Association thanks to its menu centered on locally sourced, sustainable and organic ingredients.

DELAWARE NORTH ENTERS THE NEW ZEALAND LODGING BUSINESS

Delaware North entered into a long-term partnership in early 2018 to operate Pinewood Lodge in Queenstown, New Zealand.

The property features backpacker dorms, lodge-style private rooms and new four-star self-contained cabins. The lodge is located on three acres of freehold land and has grown over the past 30 years to now feature 228 rooms.

With occupancy rates in Queenstown averaging close to 80 percent in recent years thanks to the multitude of year-round adventure activities, hiking and outdoor sports, Delaware North is confident Pinewood Lodge will continue to thrive.



Pinewood Lodge | Queenstown, New Zealand

“We could have just fixed the damage from the broken water main. However, we are fortunate to have a client in state parks that shares our vision of continuous improvement and excellence.”

JERRY JACOBS JR.
DELAWARE NORTH CO-CEO



A CLASSIC REFRESH FOR THE GIDEON PUTNAM

In a true case of making lemonade out of lemons, Delaware North overcame the challenges of a devastating water main break at The Gideon Putnam to refresh the historic hotel in Saratoga Springs, N.Y.

The break destroyed the hotel’s electrical, heating and other systems, forcing its closure for three months in 2018. Delaware North, which operates the hotel for the New York State Office of Parks, Recreation and Historic Preservation, determined it could use the opportunity of the hotel being closed for repairs to simultaneously undertake planned renovations.

“We could have just fixed the damage from the broken water main,” Delaware North Co-CEO Jerry Jacobs Jr. said at a ceremonial ribbon-cutting to mark the hotel’s May 1 reopening. “However, we are fortunate to have a client in state parks that shares our vision of continuous improvement and excellence. We therefore used this time to also renovate the hotel’s historic rooms, and the result is an enhanced visitor experience befitting this historic gem in Saratoga Springs.”

The renovations to the hotel’s 124 guest rooms and their bathrooms included new paint, carpets and blinds. New wall coverings, light fixtures, local artwork and historic photos freshened the hotel’s corridors, while enhancements were also made to the hotel’s lobby and restaurant.



The Gideon Putnam | Saratoga Springs, N.Y.

WATER FUN AND MORE

Seeing an opportunity to add to the many activities it already offers at Honey Creek Resort on Iowa’s Rathbun Lake, Delaware North in 2018 introduced a new giant inflatable waterpark.

Known as the Rathbun Lake Aquapark, the attraction features 16 different inflatable components for bouncing, climbing and sliding and can accommodate up to 40 guests at one time. The inflatable structures include a slide, balance beam, climbing wall and a “flip,” which allows someone to jump on one end and blast a friend off the other. The waterpark is open to both guests of the resort and the general public.

“This is another of the innovations to attract guests to come to the resort and enjoy spending time at Iowa’s second-largest lake,” General Manager Walt Kochansky said, noting the resort also launched Honey Creek Live, a successful weekly summer concert series.

Also in 2018, Delaware North helped the resort, which the company operates for the Iowa Department of Natural Resources, successfully celebrate its 10th anniversary with an “Endless Summer Bash” festival.



Rathbun Lake Aquapark | Iowa



Sea Crest Beach Hotel | Cape Cod, Mass.

AN EVEN BETTER BEACH VIEW

Sea Crest Beach Hotel, the seaside resort on Cape Cod that Delaware North acquired in 2016, completed several refurbishments in July 2018, including a renovated lobby and restaurant space and upgraded amenities in all guest rooms.

The improvements are part of a three-year, \$10 million renovation of the 264-room hotel that is scheduled to continue with additional room renovations in 2019.

In 2018 the lobby was refreshed with a classic coastal-chic feel, watercolor paintings by Lilly Pulitzer designer Ingrid Johnson, new



furniture and lighting, and a work station with charging outlets. All guest rooms were outfitted with new Serta Euro Pillow Top mattresses for king- and queen-sized beds. New flat-screen Samsung televisions were also installed.

A highlight was the extensive renovation of Red's Restaurant & Lounge to provide guests magnificent views of the beach and water year-round via a four-season patio. Red's, which is named after legendary Boston Celtics coach Red Auerbach, who once owned the hotel, also has a refreshed menu that is continually updated with local, seasonal dishes and fresh-caught seafood brought in daily.

DECK THE LODGE WITH SCENIC DINING

National park visitors want to soak up every minute they can taking in the surrounding natural beauty. Now, they can do so while dining at Grand Canyon National Park, thanks to Delaware North's July 2018 addition of a patio at the Yavapai Lodge Restaurant.

Construction of the patio required careful planning and execution because of environmental and architectural requirements associated with the national park location. The construction team was careful to safeguard park wildlife during the project, and several pre-existing facilities (such as storm drains, sewers and electric mains) all needed overhauls or relocations before construction of the deck could even start. Trees were carefully protected during the construction, and the hard surfaces were designed to allow percolation.

The result of years of careful planning and a controlled construction process is a beautiful patio with an excellent scenic view, perfect for visitors looking to experience the natural beauty of the park while dining.

To celebrate the completion of the patio, the Delaware North onsite culinary team revamped the restaurant menu with several themed items that have been well-received by guests.

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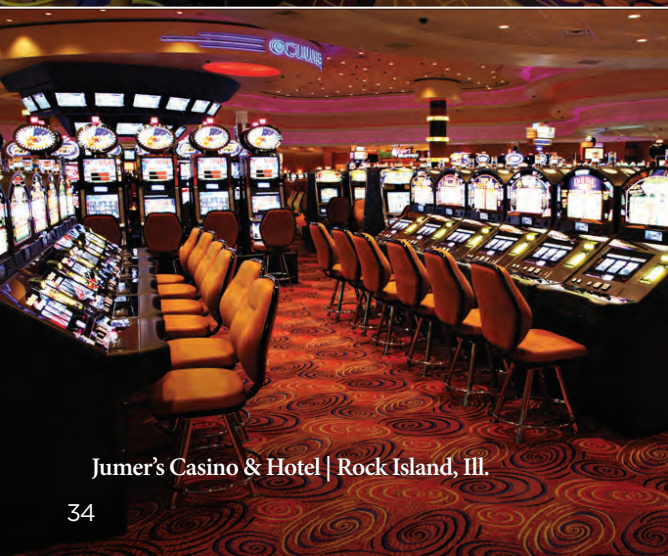
Yavapai Lodge Restaurant patio | Grand Canyon National Park, Arizona



Southland Gaming & Racing | West Memphis, Ark.



Finger Lakes Gaming & Racetrack | Farmington, N.Y.



Jumer's Casino & Hotel | Rock Island, Ill.

Gaming

Delaware North is one of the most innovative gaming operators in the United States, specializing in regional gaming venues with slots and video gaming machines, table games, poker rooms, full-service restaurants and hotels. We have gaming destinations in New York, Arizona, Arkansas, Florida, West Virginia, Ohio and Illinois, and in 2016 acquired social casino developer Ruby Seven Studios and route gaming operator GEM. In 2018, we added sports wagering in West Virginia and expanded our gaming operations into Australia.

WE'RE GAME FOR MORE 'DOWN UNDER'

Delaware North has been operating in Australia for nearly 30 years, primarily at sports venues such as at the Australian Open tennis championships and at airports.

In 2018, the company expanded its operations there into the gaming sector with the acquisition of two Brisbane-area pubs that feature gaming and — even bigger — by signing an agreement to purchase SKYCITY Darwin, a casino and resort in Australia's Northern Territory. Delaware North expects to rebrand and take over the operation sometime in the first half of 2019.

Located on 30 acres of tropical gardens alongside the Arafura Sea, SKYCITY Darwin features 600

electronic gaming machines, 30 table games, a beachfront resort, VIP super villas with gaming suites, a day spa and a variety of restaurants and conference space. The 152-room hotel and resort is Darwin's only with a five-star rating.

"Australia has been a second home for Delaware North for 30 years," said Lou Jacobs, co-CEO of Delaware North. "We are thrilled to have grown our business into a diversity of operations across the country."

The earlier acquisition of The Shafston Hotel and The Aspley Hotel marked the launch of Delaware North's Australian gaming and entertainment business. The pubs offer slot machines, or "pokies," as the main form of gaming, along with restaurants, bars, live entertainment and sporting events.



SKYCITY Darwin | Australia





Mardi Gras Casino & Resort | Nitro, W.Va.



DOUBLING DOWN IN WEST VIRGINIA

In early 2018 Delaware North added to its portfolio of successful regional gaming venues with a second full casino in West Virginia, acquiring Mardi Gras Casino & Resort in Nitro, near the capital city of Charleston.

A team of corporate representatives and operational leaders from Wheeling Island Hotel-Casino-Racetrack in Wheeling, W.Va., spent plenty of time onsite to assist the Mardi Gras management team with the transition.

Mardi Gras features more than 25 table games, a poker room, more than 850 slot machines, live greyhound racing, off-track betting for both greyhound and horse racing, several restaurants and a 150-room hotel.

“Similar to our casino and hotel in Wheeling, Mardi Gras provides a complete gaming and entertainment experience with the convenience of an onsite hotel to draw from a larger region,” said Brian Hansberry, president of Delaware North’s gaming business. Delaware North spent the balance of 2018 updating the gaming product at Mardi Gras with some of the newest available gaming machines, putting some new touches on the casino’s food and beverage offerings and enhancing the marketing of the venue in the greater region, including some synergies with Wheeling Island.

“It is clear that this company is committed to community service and the needs surrounding our West Virginia communities.”

MARGARET ANN O’NEAL
PRESIDENT AND CHIEF PROFESSIONAL OFFICER
UNITED WAY OF CENTRAL WEST VIRGINIA

MAKING A GREAT FIRST IMPRESSION

A month after finalizing the acquisition of Mardi Gras Casino & Resort, Delaware North held a reception in May 2018 for local civic and business leaders to underscore Delaware North’s strong commitment to the success of the entertainment destination and to being an important part of the community.

To that end, Delaware North Co-CEO Lou Jacobs and a senior leadership team presented the United Way of Central West Virginia with a \$5,000 gift.

“It is clear that this company is committed to community service and the needs surrounding our West Virginia communities. We appreciate the support and look forward to a strong partnership moving forward,” said Margaret Ann O’Neal, the organization’s president and chief professional officer.

Jacobs proudly pointed to Delaware North’s longtime ownership and operation of another Mountain State casino resort, Wheeling Island Hotel-Casino-Racetrack.

“West Virginia has always been a welcoming state to the business community, and we have enjoyed 30 years of great partnerships with elected leaders,” Jacobs told about 100 people at the reception. “We are cognizant of our obligation to continuously reinvigorate the business through reinvestment in the property and creating jobs, just as we have at Wheeling Island.”



Reception for local civic and business leaders at Mardi Gras



\$5M
EXPANSION
MIAMI VALLEY
GAMING



AN OHIO HOT SPOT

Since opening in 2013, Miami Valley Gaming has steadily increased in popularity as the gaming and entertainment destination of choice in Southwest Ohio.

It became apparent that the venue, which Delaware North owns and operates in a joint venture with Churchill Downs Inc., needed more space to continue delivering an exceptional experience for its patrons. Weekends and holidays had become especially busy.

So in October 2017 Miami Valley Gaming opened a \$5 million expansion, doubling the size of the high-limit area and creating a second gaming and smoking patio. In total, the expansion allowed the venue to add more than 100 video lottery terminal (VLT) gaming machines, bringing its total number of VLTs to more than 1,800.

Miami Valley Gaming is located halfway between Cincinnati and Dayton in a regional market with several other gaming and racing venues and full casinos.

“It’s a very competitive market, so it speaks volumes that guests choose Miami Valley Gaming,” Jerry Abner, marketing director for Miami Valley Gaming, told the Dayton Daily News.

Meanwhile, the venue celebrated its fifth anniversary in December 2018 with promotions for its patrons and a reception hosted by the local chamber of commerce.

EVERYTHING’S JAKE ON LONG ISLAND

Jake’s 58 Casino Hotel in Islandia, N.Y., celebrated its one-year anniversary in May 2018 by adding to its dining options and giving its loyal patrons a chance to meet players from a beloved New York championship team.

The venue’s full-service restaurant, Bistro 58, was expanded from 120 to 200 seats, and its menu was redesigned with more contemporary selections. A new coffee bar, C+M Bar, a concept that has been perfected by Delaware North’s Patina Restaurant Group, opened in the hotel’s lobby.

“We are incredibly thankful for how this community has embraced us in our first year of operation,” said Chuck Kilroy, general manager of Jake’s 58 Casino Hotel.

Renovations to conference spaces paved the way for the 1,000 video lottery terminal (VLT) gaming machines. Delaware North is now renovating the 227 guest rooms in the hotel, which was acquired in 2016.

The anniversary party featured alumni players from the 1986 World Series Champion New York Mets, including Keith Hernandez and Mookie Wilson.

A few weeks later, Kilroy and his team participated in the dedication of the First Responders Recreational Ball Field complex in Islandia, a project made possible through a significant donation from Delaware North.



Bistro 58 at Jake’s 58 Casino Hotel | Islandia, N.Y.



Chuck Kilroy and team at the dedication of First Responders Recreational Ball Field Complex



Jake’s 58 Casino Hotel | Islandia, N.Y.

The club designated July 16 as Shriners Night at the racetrack, raising money from promotions and donations to present a check to the organization toward the hospitals it operates.



Shriners Night at Daytona Beach Racing & Card Club

CELEBRATING A DAYTONA TRADITION

Daytona Beach Racing & Card Club, which Delaware North acquired and began operating in 1987, celebrated its 70th anniversary in July 2018 with special events to thank its patrons and the local Florida community for its decades of support.

Founded as the Volusia County Kennel Club in 1948, the facility was originally located adjacent to Daytona International Speedway. A poker room was added to the greyhound racetrack in 1997, and a land swap with the speedway paved the way for construction of the current facility in 2008 just a few miles away.

The weeklong festivities included a free concert at the racetrack and a number of guest promotions, including a customer appreciation day that featured cash and prize giveaways — with 70 winners named each hour — and 70th anniversary T-shirts.

Twenty-four employees with 25 years or more of service with the club were recognized, and five-time World Series of Poker bracelet winner Scotty Nguyen made an appearance. The \$20,000 Dave Wood Memorial stakes race wrapped up the celebration.

With the Shriners International conference in Daytona Beach, the club designated July 16 as Shriners Night at the racetrack, raising money from promotions and donations to present a check to the organization toward the hospitals it operates.

ALL BETS ARE ON IN WEST VIRGINIA

Delaware North entered the new U.S. sports wagering industry in 2018 by launching a partnership to provide turnkey retail and mobile sports wagering services and by opening sportsbooks at its two West Virginia casinos in December.

The partnership with Miomni Gaming, a leading provider of U.S. mobile sports wagering technology, was announced in October. Sports wagering in the United States only became viable a few months earlier thanks to a U.S. Supreme Court decision.

“In working with Miomni, a recognized expert firm on the technology side, Delaware North is uniquely positioned to become a leader in the emerging sports wagering sector in the United States,” said Brian Hansberry, president of Delaware North’s gaming business.

Delaware North and Miomni first launched the exclusive BetLucky sports wagering app — West Virginia’s first — for Wheeling Island Hotel-Casino-Racetrack in Wheeling and Mardi Gras Casino & Resort in Nitro, near Charleston. West Virginia is one of only a few states to have authorized sports wagering.

Similar apps will also be used at Delaware North gaming properties in states where sports wagering becomes legal and also offered to other U.S. casino operators who want to add legal sports wagering cost-efficiently.



Wheeling Island Hotel-Casino-Racetrack’s new BetLucky app



Sportsbook area at Mardi Gras Casino & Resort | Nitro, W.Va.



Austin-Bergstrom International Airport

Travel

Delaware North is one of the world's leading airport food and retail companies — operating in more than 30 airports around the world and managing 200-plus brands in more than 300 restaurants and retail stores. Our expertise has helped us land in some of the most prestigious airports in the world, including Hartsfield-Jackson Atlanta International Airport, Los Angeles International Airport, London Heathrow Airport and Melbourne International Airport.

DELAWARE NORTH CAPTURES ESSENCE OF AUSTIN WITH RESTAURANT AND RETAIL CONCEPTS

Following major refreshes of Annie's Café and The Salt Lick BBQ, two mainstay restaurants at Austin-Bergstrom International Airport, Delaware North in 2018 opened several more restaurants and retail outlets that showcase the very best of Texas' capital city.

Included in the expanded dining offerings are Austin favorites Tacodeli, The Peached Tortilla and JuiceLand, along with Austin-area retail stores Tyler's and Book People. I VINI, a brand-new fast-casual Italian concept created with local

restaurateur Love Nance, was also opened in 2017 and earned a second-place award from Airports Council International-North America (ACI-NA) for best new local concept.

"Austin has a very distinctive presence and much of that stems from the city's food culture," said Kevin Kelly, president of Delaware North's travel division. "These new dining options are an authentic taste of what many have come to love about the city and we are proud to offer Austin-born concepts to everyone who travels through Austin-Bergstrom International Airport."



Austin-Bergstrom International Airport





Prime Burger | Euston Station, London



UK TRAVEL PORTFOLIO ADDS PREMIUM BURGER AND ROTISSERIE CHICKEN CONCEPTS

In late 2017, Delaware North expanded its presence at travel hubs in the United Kingdom when it acquired Magicgoal Ltd, which owns and operates premium quick-service U.K. concepts Prime Burger, Rotisserie Chicken and Sandwich & Co.

Founded by a husband-and-wife team, Magicgoal operates five fresh-quality quick-service restaurants and kiosks: Prime Burger at both London's Euston and St. Pancras international railway stations and Prime Burger, Rotisserie Chicken and Sandwich And Co. at ExCel

London Exhibition Centre. Prime Burger, in particular, has become a favorite for commuters with its guarantee of serving a fresh-quality burger in 8 minutes or less.

"Magicgoal is an exciting acquisition for us as it marks our intention to develop very high-quality proprietary brands and further innovate our existing operation," said Doug Tetley, managing director of Delaware North's U.K. business. "The Magicgoal portfolio complements our footprint in U.K. travel hubs and gives us an excellent base to deliver new concepts and formats in our stadia, exhibition centres, and visitor attraction markets."

DENVER INTERNATIONAL AIRPORT BOLSTERED WITH LOCAL FLAVORS, CONCEPTS

There was no shortage of good news on the food front in 2018 at Denver International Airport.

Delaware North — a food and beverage partner of Denver's airports for more than 70 years — celebrated the grand opening of an airport outpost of the popular Denver Central Market. And plans were announced for another unique airport dining concept: Denver Street Eats.

The 4,090-square-foot Denver Central Market houses many of the popular restaurants found at the flagship location in downtown Denver, including chef-driven concepts by some of the city's best-known culinarians. Guests can order from a concourse-facing kiosk, from the counter at each for quick pick-up, or from tabletop tablets that use concierge service to expedite orders to their seat.

Denver Street Eats, which will open in 2019, was created as a tribute to Denver's popular River North (or "RiNo") neighborhood and will feature a rotation of local chefs curating and preparing the menu. The first two chefs will be Jeff Osaka, creator of Osaka Ramen in RiNo, and Biju Thomas, author and owner of Biju's Little Curry Shop.



Denver Central Market | Denver International Airport



Denver Street Eats | Denver International Airport



DELAWARE NORTH BRINGS STAR POWER TO ONTARIO AIRPORT AS PART OF \$6 MILLION RENOVATION

In August 2018, Delaware North formally celebrated its transformation of the dining experience at Ontario International Airport in Southern California.

The \$6 million upgrade of the airport's food and beverage program includes high-profile brands such as Einstein Bros bagels, Wahoo's Fish Taco, Wolfgang Puck's WPizza and Rock & Brews restaurant – the latter of which was co-founded by Gene Simmons and Paul Stanley of the legendary rock group KISS. The formal grand opening included menu tastings from each new concept and a raucous bar-christening with Simmons and Stanley.

The new eateries joined proprietary concepts Cross Grain Brewhouse and Harvest & Grounds at the airport, where Delaware North first began food and beverage operations in 1998.



Rock & Brews Restaurant | Ontario International Airport

DELAWARE NORTH EXPANDS BOSTON FOOTPRINT WITH LOGAN AIRPORT CONTRACT

No stranger to Boston, Delaware North in 2018 announced a new multiyear contract to operate food, beverage and retail outlets at Logan International Airport. Delaware North in late 2018 opened the first of its 11 restaurant concepts and one retail store in four of the airport's terminals.

The new food and beverage outlets will have a distinctively Boston feel, with several restaurants created by acclaimed Boston chef Michael Schlow being adapted for the airport, including Alta Strada.

Additionally, the Boston Bruins will have a dedicated, contemporary sports bar for fans to gather as they travel to and from Boston. New Balance, another Boston-born company, will also have a presence with a new retail outlet scheduled to open in 2019.

No stranger to Boston, Delaware North in 2018 announced a new multiyear contract to operate food, beverage and retail outlets at Logan International Airport.



Boston Bruins concept | Boston Logan International Airport



Alta Strada | Boston Logan International Airport



Sydney Central Railway Station (Australia)

STYLISH NEW DINING VENUES TAKE OFF AT SYDNEY'S ICONIC CENTRAL RAILWAY STATION

Delaware North in September 2018 announced the opening of several exciting new food and beverage outlets at Sydney's Central Railway Station in Australia. The venues include:

- **Switchman Espresso:** Providing takeaway coffee, snacks and other refreshments for commuters on the go.

- **Central Food Market & 2000 Acres:** Providing quick, convenient takeaway or dine-in restaurant options housed within a market of shops catering to a wide range of cuisines.
- **Eternity:** The signature venue of the new outlets, combining a modern and casual bar and grill dining atmosphere for 220 guests, showcasing local New South Wales wines, beers and ingredients.

Delaware North had its 25-year partnership with Sydney Trains extended earlier in 2018 when it was successful in its bid to operate new venues within the stunning heritage building.



Eternity | Sydney Central Railway Station (Australia)





Oma Artisan Bakery & Cafe | Auckland Airport, New Zealand



Mexico | Auckland Airport, New Zealand

NINE NEW RESTAURANTS ON TAP FOR AUCKLAND AIRPORT

Delaware North partnered with some of the leading celebrity chefs in New Zealand and Australia as part of being awarded a contract in mid-2018 to operate food service at Auckland Airport. The effort, which expanded and enhanced the variety of food and beverages available to travelers, includes the following concepts:

- **Better Burger:** Auckland's rising star burger concept, made with fresh New Zealand produce at great value pricing.
- **Mexico:** All the color and vibrancy of its namesake nation, Mexico celebrates the delicious, fresh and lighter side of Mexican cuisine.
- **Orleans Chicken & Waffles:** New Orleans-inspired southern fried chicken and waffles, quick-service restaurant style.
- **Best Ugly Bagels:** Celebrity chef Al Brown's famous Montreal-style bagel concept is delivered at two outlets (servicing the domestic and international terminals).
- **400 Gradi:** Internationally awarded celebrity chef Johnny Di Francesco brings his wood-fired Neapolitan pizza and pasta.
- **Tea Garden by Dilmah:** High tea cuisine developed in collaboration with celebrity chef Simon Gault, Dilmah and Delaware North Master Chef Markus Werner.
- **Blue Marble Lane:** A new bar and eatery developed by Delaware North and the Britomart Hospitality Group.
- **Oma Artisan Bakery & Café:** A working artisan bakery in partnership with celebrity baker Isabel Pasch.



Folse Market | Louis Armstrong New Orleans International Airport

BIG CHANGES IN THE BIG EASY

Louis Armstrong New Orleans International Airport will open a brand-new 35-gate terminal in 2019. And with it, Delaware North will unveil an array of new culinary destinations for travelers coming to and from New Orleans.

The restaurants are grounded in creating an authentic New Orleans dining experience at the airport and feature an impressive slate of New

Orleans chefs and restaurants, including legendary New Orleans chef Leah Chase and her family, as well as celebrity chefs John Folse, Michael Gullotta and Aaron Sanchez.

Innovative concepts include the Folse Market, featuring fresh seafood, po'boys, charcuterie, coffee and wine, and the Heritage School of Music Stage and Wine Bar, which will have live music produced in partnership with the New Orleans Jazz & Heritage Festival and Foundation.

In 2019, Delaware North will unveil an array of new culinary destinations for travelers coming to and from New Orleans.



Patina Restaurant Group

Patina Restaurant Group is a leader in the premium segment of the restaurant and catering industry. Patina operates more than 50 restaurants and manages catering and food service operations at landmark locations in high-profile cultural and entertainment venues, including Rockefeller Center, the Metropolitan Opera, Lincoln Center, Anaheim’s Downtown Disney®, Disney Springs in Orlando, Epcot World Showcase and the Los Angeles Music Center.

A DAZZLING DEBUT IN DISNEY SPRINGS

With a show-stopping dance number, a confetti shower and some serious star power, Patina Restaurant Group’s newest locations — Maria & Enzo’s, Enzo’s Hideaway and Pizza Ponte — officially debuted at Disney Springs in early January 2018.

Mickey and Minnie were two of the VIP guests in attendance as Delaware North Chairman Jeremy Jacobs, along with Co-CEOs Jerry Jacobs Jr. and Lou Jacobs, joined executives from Disney to welcome guests to the new eateries at Walt Disney World in Orlando, Fla.

A fourth restaurant, The Edison, celebrated its grand opening the same week, ringing in 2018 with a lavish New Year’s Eve bash.

The sold-out grand opening party was just the beginning for The Edison. The new venue is a playful dining experience for families during the day, while at night, the space transforms into a destination focused on craft cocktails, contemporary American fare and entertainment unique to Central Florida, all within an eye-popping, waterfront setting.



Enzo’s Hideaway | Disney Springs, Fla.



The Edison | Disney Springs, Fla.



Morimoto Asia | Disney Springs, Fla.



Pizza Ponte | Disney Springs, Fla.



Maria & Enzo’s | Disney Springs, Fla.



2018 MTV Movie & TV Awards

PATINA CATERING GIVES A PAIR OF AWARD-WORTHY PERFORMANCES

Patina Catering, a division of Delaware North's Patina Restaurant Group, pulled out all the stops for a pair of awards shows in 2018 — the MTV Movie & TV Awards, which took place in June, and the 2018 Emmy Awards Governors Ball in September.

At the MTV Movie & TV Awards in Santa Monica, Calif., Patina catered to about 1,000 guests, with 250 VIPs and award nominees receiving seated table service. Inventive hors d'oeuvres such as savory macarons, sweet sushi, tiny pepperoni pizzas and boozy bomboloni (Italian donuts) made up the menu, which was created by Executive Chef Alec Lestr and Executive Pastry Chef Frania Mendivil.

The Emmy Awards Governors Ball was a series of three events, as the Television Academy held back-to-back Creative Arts Governors Ball events on Sept. 8 and 9, while the main ceremony was held on Sept. 17. The events had a dramatic new location on the roof of the L.A. Live Event Deck, as well as a new format.

Forgoing a formal sit-down dinner, Patina instead presented a more flowing, interactive presentation that encouraged guests to mix, mingle and sample more than 35 different fine-dining small plates.

More than 250 chefs, 20 executive chefs, 50 bartenders and 600 servers came together for each of the three events to present the innovative and memorable culinary experience, which included tabletop snacks, tray-passed hors d'oeuvres and a variety of small-bite stations.



2018 Emmy Awards Governors Ball



In 2018, Patina 250 in Buffalo, N.Y., debuted a new menu for its outdoor courtyard that pays tribute to its parent company, featuring items from some of Delaware North’s most iconic locations.

DELAWARE NORTH BRINGS SIGNATURE FLAVORS TO THE PATINA 250 COURTYARD

Patina 250, located in Delaware North’s global headquarters building in Buffalo, N.Y., in 2018 debuted a new menu for its outdoor courtyard that pays tribute to its parent company.

The “Delaware North All-Stars” menu features items from some of the most iconic locations where Delaware North operates, including Lambeau Field (Green Bay, Wisc.), Wembley Stadium (London), the Australian Open (Melbourne), Rockefeller Center (New York City) and the Emmy Awards Governors Ball (Los Angeles).

PATINA PREPARES TO BRING A NEW TASTE TO BOSTON

When Delaware North and Boston Properties conceived of The Hub on Causeway, our Patina Restaurant Group seized the opportunity to control the food and beverage offering outside of the company-owned-and-operated TD Garden.

Patina Restaurant Group leased nearly 39,000 square feet of space in The Hub, and is conceiving, designing and building a sports bar and food hall.

The sports bar will occupy more than 20,000 square feet. The food hall, meanwhile, will have nearly 600 seats in more than 18,000 square feet of space, and will feature a wide variety of authentic, high quality and proven brands and concepts.

Also in Boston, Patina Restaurant Group took over events catering operations at the New England Aquarium on January 1, 2019.



Patina 250 Courtyard | Buffalo, N.Y.



The Hub on Causeway sports bar concept | Boston



CELEBRATING

Associate Appreciation Week

From all corners of the world, Delaware North in 2018 celebrated its team of 55,000 dedicated, diverse and talented associates. The company's first-ever Associate Appreciation Week featured a week full of appreciation events and recognition of associates who consistently live out the company's core values, which are:

LEAN FORWARD

We are innovative creators who continually reimagine what's next.

STAND UP

We lead by example, own our decisions, and take initiative.

COME TOGETHER

We work collaboratively with each other and believe in the power of partnership.

DO RIGHT

We value integrity and always do the right thing, especially when no one is looking.

THINK GUEST

The guest experience is at the heart of everything we do.





Food is Our Passion

Every day at hundreds of locations across the globe — national park lodges, destination resorts, major sports stadiums and arenas, convention centers, casinos and airports — Delaware North’s culinary and hospitality staff is providing an extraordinary dining experience for our guests.

Our passion, innovation and unwavering commitment to the highest level of training for our culinary and service teams have been crucial in our reaching the forefront of the hospitality industry. These qualities underlie our food-and-beverage philosophy of striving for excellence in quality, presentation and variety.

Our Culinary & Hospitality Council guides culinary recruitment, retention, continuing education and training programs, including one to ensure that our chefs are independently certified by the American Culinary Federation or the Culinary Institute of America’s ProChef® program. Not only do we pay for the certification exam, we give our chefs time away from their jobs to train with our most accomplished chefs. The council promotes development and implementation of best practices and consistent food-and-beverage standards. It also serves to keep our

culinary and hospitality leaders and senior executives focused on the latest trends, opportunities and innovations in the field.

In addition to regular meetings and communication, the council holds an annual conference — dubbed The Summit in 2018 — to bring hundreds of our chefs and culinary leaders together with industry experts and more than 150 leading food product companies. Keynote speakers at the conference have included Jim Koch, founder of Boston Beer Company; Paul Prudhomme, a noted chef, restaurateur and entrepreneur; and Robert Irvine, world-renowned chef and host of Food Network’s “Restaurant: Impossible.”

“To me, anybody that does mass feeding and does it as well as Delaware North does — obviously I’ve got something to like,” Irvine said.

PLANT-FORWARD CULINARY CHALLENGE TAPS INTO GROWING FOOD TREND

Meatless diets continue to grow in popularity around the world as a healthier, more sustainable alternative to traditional meat-based dishes.

During the annual gathering of Delaware North’s global culinary team — in 2018 branded The Summit — teams were tasked with creating a meatless menu during the popular Culinary Challenge. The competition featured chef teams from across Delaware North’s divisions vying for the coveted Culinary Challenge Cup.

The competition focused on creating dishes that relied on ingredients made entirely from plant products. Five teams of chefs had their culinary expertise on display and created such dishes as Harissa Jackfruit Naan, Smoked Beet Carnitas Tamales, Red Velvet Beet Cake and even Hemp Seed Donuts.

The winning team, from Delaware North Sportservice, wowed the judges with a vegetarian scallop dish (made with trumpet mushroom, red quinoa, salsa verde, radish and lime foam) and a roasted cauliflower “wedge” (made with raw fall vegetable union, butternut coulis, soyrizo, apple herb vinaigrette, and a pumpkin seed brittle).



The Summit Culinary Challenge | Buffalo, N.Y.

“Working at The Ridgeline Hotel Estes Park was one of the best experiences of my life.”

PAIGE CARATTINI
STUDENT PARTICIPANT OF RIDGELINE HOTEL
CULINARY CLASS



ASPIRING CULINIARIANS GET HANDS-ON LESSON AT LATITUDE 105 ALEHOUSE

In April 2018, the Delaware North owned-and-operated Latitude 105 Alehouse at The Ridgeline Hotel Estes Park hosted a culinary class for several high-school students.

The day started with the venue’s top culinarians leading the students through several lessons in cooking techniques. They also explained the job opportunities available to culinary students in the hospitality industry.

The students were then led through the process of hosting a banquet, assisting with every aspect from preparation to presentation. The day ended with the Latitude 105 associates and the students cooperating to develop the restaurant’s milkshake specials for the next week.

“Working at [The Ridgeline Hotel] Estes Park was one of the best experiences of my life,” Paige Carattini, a student, said. “Not only is my career choice now fully cemented in the culinary and hospitality field, but the interactions, connections, and memories I made in the kitchen are ones I will never forget.”



2018 Chef Summit at The Ridgeline Hotel Estes Park | Estes Park, Colo.

EXECUTIVE CHEFS FROM PARKS LOCATIONS COME TOGETHER FOR PROFESSIONAL DEVELOPMENT

A group of executive chefs from throughout Delaware North’s parks and resorts business came together in February 2018 for a chef summit at The Ridgeline Hotel Estes Park, the Delaware North-owned-and-operated lodging property near Rocky Mountain National Park in Colorado.

The summit was held to prepare executive chefs for the coming year and featured several workshops from the company’s top chefs, in addition to presentations from vendors. The program began with a look back on 2017

and helped set the stage for 2018. It then moved into tackling food waste, with workshops geared toward approaching food recycling with fresh eyes.

The second day’s theme was sweets, with hands-on demonstrations from Delaware North’s corporate pastry chef. Day three covered plant-based foods and ended with subgroups preparing a dinner showcase.

All three days were filled with extra workshops to help chefs improve their skills. Additionally, vendors such as Sysco, Cuisine Solutions and Sugar Foods hosted presentations.

The summit was held to prepare executive chefs for the coming year and featured several workshops from the company’s top chefs.

As the official food and beverage partner at SunTrust Park, Delaware North Sportservice was on-hand to host the StarChefs Rising Stars Gala with the Braves and serve as an event sponsor.



StarChefs Rising Stars Gala 2018 | Atlanta

STARCHEFS GALA OFFERS A TASTE OF THE BIG LEAGUES

The home of the Atlanta Braves in February 2018 played host to a different type of big-league event: The StarChefs Rising Stars Gala, which showcased up-and-coming culinary talent from the Atlanta area. As part of the event, StarChefs, a leading culinary industry organization dedicated to promoting and championing restaurant professionals, hosted a VIP reception, awards ceremony and a gala tasting event at SunTrust Park that featured creations from the top chefs being honored by the organization.

As the official food and beverage partner at SunTrust Park, Delaware North Sportservice was on-hand to host the event with the Braves and serve as an event sponsor. More than 400 guests attended the night's festivities, which included a friendly competition in which the chefs each provided a showcase dish for attendees to sample.

Delaware North's team from the ballpark's Terrapin Taproom took third place in the competition with its barbeque-themed dish: a nine-inch bone-in beef rib with a salt-and-pepper rub.

DELAWARE NORTH EARNS SEVERAL NATIONAL RESTAURANT ASSOCIATION CERTIFICATIONS

More than 50 front-of-house supervisors and managers from throughout Delaware North were certified by the National Restaurant Association in the spring of 2018.

The National Restaurant Association (NRA) is one of the professional education and certification bodies included in the Delaware North Culinary & Hospitality Council's certification and education program. The NRA approached Delaware North about the certification initiative, which offers associates such as restaurant supervisors and managers an opportunity to obtain professional accreditation, with varying levels based on experience.

A total of 54 associates from four Delaware North divisions earned certifications in one of three possible categories: Certified Restaurant Professional (CRP), Certified Restaurant Supervisor (CRS) and Certified Restaurant Manager (CRM). This number is expected to grow in the coming years as Delaware North continues to invest in its associates and their culinary education.

MORE THAN 50 SUPERVISORS AND MANAGERS WERE CERTIFIED BY THE NATIONAL RESTAURANT ASSOCIATION IN 2018.



Chefs at SunTrust Park | Atlanta



Fifth & Main | Buffalo Niagara International Airport



MetLife Stadium | East Rutherford, N.J.



Grand Canyon General Store | Arizona

Retail Selection & Style

Through our holistic approach of creating memorable retail experiences, we operate more than 350 retail locations in well-known venues and locations around the world.

From impressive store design and layout and engaging displays to compelling product selections and inviting atmosphere and ambience, Delaware North offers a one-of-a-kind shopping experience. Whether our guests are on the go in a busy airport, exploring a breathtaking park, experiencing the action of a gaming facility or at the big game, our global retail operation is tailor-made to help our guests cherish life's special occasions.

To us, it's all about helping our guests capture a moment in time — and we have been part of some truly memorable experiences in recent years.

BIG LEAGUE RETAIL AT LITTLE CAESARS ARENA

One of the most eye-catching aspects of Delaware North's operations at Little Caesars Arena in Detroit is the Team Store, the official retail shop for the NHL's Red Wings and the NBA's Pistons. The store is attached to the state-of-the-art arena and boasts more than 6,700 square feet of retail space.

It features environmentally friendly LED lighting that can quickly transform the atmosphere from one team's colors to the next. To maintain the store's unique look and feel, Delaware North uses an on-site visual merchandise manager whose focus is creating an ideal shopping environment for fans at the arena.



Team Store at Little Caesars Arena | Detroit





Minneapolis-St. Paul International Airport | St. Paul, Minn.

AWARD-WINNING RETAIL TAKES FLIGHT AT MINNEAPOLIS-ST. PAUL AIRPORT

Delaware North's buildout of a dozen new retail outlets at Minneapolis-St. Paul International Airport wrapped up in 2017 and quickly caught the eye of travelers and critics alike. Several of the stores scooped up industry awards and helped the airport earn *Airport Experience* magazine's top retail program honors in 2017.

Explore AFAR, a destination-driven news and convenience store, was ranked as the top concept in the news and gifts category. Developed in partnership with AFAR magazine, a first for the trendy, adventure-focused

publication, the store has dynamic and interactive displays and a variety of products, including fresh-to-go food items, books and magazines, electronics and accessories, gifts and apparel, health and beauty products, a variety of healthy snacks and cold beverages, as well as craft-made toffee products.

Contributing to the airport's award-winning retail program are Minnesota State of Nice, Frivolous and Adventure North, an outdoor apparel store. Several convenience and newsstand concepts were also opened, all paying tribute to iconic Twin Cities neighborhoods, including Como Park Essentials, Loring Park Essentials and the award-winning North Loop Market.



Minneapolis-St. Paul International Airport





Locker system at Bank of America Stadium | Charlotte, N.C.

NEW LOCKER SYSTEM TECHNOLOGY ADDS CONVENIENCE TO SPORTSERVICE OPERATIONS

Two professional sports venues at which Delaware North Sportservice has business operations have taken an innovative approach to providing fans with a convenient way to order and pick up items.

Using a new system of self-serve lockers developed by Apex Supply Chain Technologies, Delaware North Sportservice has deployed the concept at the NFL's Bank of America Stadium in Charlotte for retail merchandise and at MLB's Great American Ball Park in Cincinnati for food and beverage items. In both instances, the technology is the first of its kind for the respective pro leagues.

At Bank of America Stadium, home of the Carolina Panthers, 23 team-branded lockers were recently installed next to the team's retail store outside of the stadium, along with an additional 11 lockers inside the building, to provide an easy way for fans to seamlessly retrieve purchases without the hassle of lines.

Fans ordering merchandise through the Panthers' website are given locker pickup as an option on game days or non-game days. For those choosing the option, Delaware North Sportservice delivers the order to a locker using a bar code, which the retail staff scans, sending a message



Trendz | Estes Park, Colo.

to the Apex system. The system automatically opens the next available locker. After the merchandise is deposited in the locker, the Apex system sends an email to the customer with pickup instructions and a unique QR code plus a six-digit code.

RENOVATIONS GIVE TRENDZ ESTES PARK A NEW LOOK AND FEEL

In spring 2018, Delaware North completed the renovation of two properties in Estes Park, Colo., a gateway community to Rocky Mountain National Park: The Ridgeline Hotel Estes Park and Trendz, a boutique retail store.

In addition to \$6 million in renovations to the hotel property, Delaware North invested significant time and resources into upgrading Trendz. The company's in-house Art & Style team provided new branding, including logo design and merchandising graphics; new fixtures such as tables, racks and shelving units; new flooring, paint and window box graphics; and a new store layout that includes a seating area, slat wall, shelves and hardware.

The newly refurbished Trendz offers an ever-changing collection of contemporary home decor, decorative accessories, jewelry and gifts for the Colorado lifestyle. And added to the retail therapy experience in 2018: Trendz is serving craft beer from local breweries.

A focal point of the store, the Apollo 11 gantry is seamlessly integrated into the design.

NEW SPACE SHOP BRINGS OUT-OF-THIS-WORLD SHOPPING EXPERIENCE TO KENNEDY SPACE CENTER VISITOR COMPLEX

Visitors to Kennedy Space Center Visitor Complex in early 2018 may have noticed an increasing amount of "space dust" by the temporarily closed retail store. The dust has cleared to uncover the new Space Shop at the visitor complex, which Delaware North operates for NASA.

At 15,372 square feet, the world's largest store devoted to space memorabilia and NASA gear has opened its doors once again, revealing new interactive shopping experiences, an historic artifact, and a larger inventory of souvenirs, memorabilia and retail items.

A focal point of the store, the Apollo 11 gantry is seamlessly integrated into the design. As guests walk across it on the second floor, they now have a view of all the activity around and underneath them, offering a great photo opportunity.

Other exciting new features include a customization station, where shoppers can personalize their gear and souvenirs, and two "selfie stations" where guests can take photos of themselves as astronauts to share via email and social media.



15,372 SQUARE FEET
THE WORLD'S LARGEST STORE DEVOTED TO SPACE MEMORABILIA



Space Shop at Kennedy Space Center Visitor Complex | Cape Canaveral, Fla.



Exemplary Guest Experience

Driven by one simple purpose — to delight guests — Delaware North is committed to providing the utmost hospitality. With that goal top of mind, our associates work each day to provide exemplary customer experiences throughout our operations.

GuestPath®, our proprietary customer service and five-step continuous improvement process, has defined the company’s customer service over the past 15 years. Today, Delaware North has the insight to better understand the entire customer journey — the next generation of customer service for clients, guests and associates.

GuestPath is built upon standards — service standards, brand standards and operational standards — and relies on a proven scientific approach to continual improvement, empowering our associates with the knowledge and skills they need to deliver first-class service.

The process allows all guest-facing staff to share a common vision of what great experiences look, feel and sound like. It provides guests with a superior, engaging and consistent experience throughout their entire visit — building loyalty for Delaware North and its partners.



Mulleken “Mimi” Tessema at Hartsfield-Jackson Atlanta International Airport



GuestPath Business Partners Marcus Story and Kathy Dispenza

ATLANTA AIRPORT ASSOCIATE EARNS HIGH PRAISE FROM DEPARTMENT OF AVIATION

Mulleken “Mimi” Tessema, a bartender for Delaware North at Grindhouse Killer Burgers, was named the 2017 Employee of the Year at Hartsfield-Jackson Atlanta International Airport. The award is given out by the Atlanta Department of Aviation, with all airport employees eligible.

Known as the “face of Grindhouse Killer Burgers,” Tessema has built an incredible reputation by providing outstanding service and making each visit a special experience for guests, General Manager Scott Knight said, adding that she averages more than three compliments per week through airport customer service feedback channels and by way of the Delaware Norths Listens program.

“There is something special about being named Number One out of 65,000 airport employees,” Tessema said. “I cannot believe how special my Delaware North management team treats me, creating the opportunity to be honored like this. I have never worked for a company like this or for managers who care for their employees to this extent.”

CCXP DESIGNATIONS REFLECT THE EVOLUTION OF GUESTPATH PROCESS

Delaware North’s GuestPath® program is undertaking a significant shift in how the company approaches its service promise of “creating special experiences” for guests — from the point of purchase exploration to the end goal of guest loyalty.

A big part of preparing for the transition is educating the GuestPath team in the practices of customer experience. These areas include creating customer-centric cultures, organizational adoption and accountability, using customer insights, experience design, customer experience strategy and metrics, and engagement practices.

The GuestPath team has undergone months of education on these practices to obtain Certified Customer Experience Professional (CCXP) designations from the Customer Experience Professionals Association.

The certification program provides a means for individuals to obtain professional recognition of their high levels of knowledge of the customer experience discipline. This accreditation — obtained by GuestPath Business Partners Marcus Story and Kathy Dispenza — is an industrywide, standardized avenue for customer experience (CX) practitioners to demonstrate their expertise and accomplishments.



Grand Canyon National Park | Arizona

NEW PRIZE LOCKERS OFFER ADDED INCENTIVE

Delaware North's operation at Grand Canyon National Park has introduced a new and innovative way to reward associates for exemplary guest service. The team at Grand Canyon unveiled the 2018 GuestPath Prize Locker during an associate picnic and barbeque.

Associates at Grand Canyon receive GuestPath prize tokens for earning 100 percent on validations, positive guest feedback and other exemplary conduct that supports Delaware North's core values.

Prizes will remain on display at Grand Canyon's human resources office in the Prize Locker, so new associates are introduced to GuestPath — Delaware North's proprietary customer experience process — as they go through onboarding and training.

Grand Canyon's Employee Recreation team hosted the picnic barbeque at three separate locations so that all associates had a chance to review the Prize Locker and eat lunch served by management volunteers. The Yavapai Lodge culinary team prepared a spread that included Executive Chef Justin Warnat's "Gunslinger Hot Sauce Potato Salad."



2018 WOW-A-THON events



GUESTPATH BRINGS THE 'WOW' FACTOR

The GuestPath team in 2018 hosted two "WOW-A-THON" events to reward associates at locations around the world.

During a WOW-A-THON, Delaware North leadership issues a special ticket to associates "caught" demonstrating the company values, delivering great service and/or going above and beyond for guests.

Associates who received a WOW-A-THON ticket then visited GuestPath.com for a chance to win one of the many prizes. Associates were also encouraged to post WOW-A-THON photos on social media, incorporating the #DelawareNorthProud hashtag for a second chance to win.

"Nothing sets Delaware North apart more than our incredible team members and commitment to GuestPath," Delaware North's Jacobs family leadership team said in a companywide email. "WOW-A-THON is an opportunity to recognize those who go above and beyond to create exceptional experiences and embody our value of 'Think Guest.'"

TWO-MONTH-LONG CONTEST VALIDATES ASSOCIATES' SERVICE-DELIVERY SKILLS

Delaware North's parks and resorts division and the company's GuestPath team held a "2018 Validation Challenge" for managers and supervisors to complete validations of their associates' service-delivery skills.

The first-ever Validation Challenge began July 1 and ran through Aug. 31. "As we continue to 'Own the Guest Experience' across our parks and resorts locations, the Validation Challenge provides an incentive and reward for our location leadership teams who focus on validating and coaching the service-delivery skills of our associates," said Scott Socha, president of the company's parks and resorts division.

Each parks location was placed into one of five teams, and the team that completed the most validations through the GuestPath validation app received medals and funding for a celebration party.

In addition, managers and supervisors who completed at least eight validations were entered into a drawing for a chance to win a \$50 gift card. Fifteen gift cards were given away each month.

"Nothing sets Delaware North apart more than our incredible team members and commitment to GuestPath."

JACOBS FAMILY LEADERSHIP TEAM



Because We Care

One of the hallmarks of Delaware North across all of our operations is the focus we put on stewardship and corporate social responsibility.

THE ENVIRONMENT

Our proprietary stewardship platform, GreenPath®, helps ensure we carefully manage our environmental impact and positively contribute to the communities we serve. Setting a new standard for efficiency and responsibility, GreenPath has won regional, national and even international awards from sports and entertainment venues, NASA, the National Park Service, the U.S. Environmental Protection Agency, the U.S. Travel Association, airports, municipalities and others.

By saving millions of gallons of water, reducing energy consumption, diverting thousands of tons of solid waste and seeking more efficient ways of doing things, we've made significant strides in the preservation of our environment.

Since its inception in the 1990s, GreenPath — much like the communities and environments it serves — has continued to grow and flourish. It has evolved to include a robust stewardship platform that supports sustainability and features five key

branches — demonstrating our commitment to operating responsibly and protecting natural and cultural resources.



WNY United Way Day of Caring 2018 | Buffalo, N.Y.

THE COMMUNITY

We are active in the communities we serve, making our operations more than places we work; they are places we invest in because we believe in them. From being a responsible employer with dedicated hiring practices for the disadvantaged, seniors and students, to food donation programs that feed the hungry, we believe that social responsibility is the duty and hallmark of being an exceptional corporate citizen.

RECORD-BREAKING PARTICIPATION HIGHLIGHTS UNITED WAY CAMPAIGNS

Associates in Delaware North's hometown have significantly stepped up their participation to the company's United Way campaign, donating their time, talents and treasury to serve the less fortunate in their community.

In August 2018, more than 200 Delaware North associates from around Buffalo and Western New York came together for the annual United Way Day of Caring.

The team was Delaware North's largest in 19 years of participating in the Day of Caring, nearly doubling 2017's total. Delaware North's culinary team at KeyBank Center also contributed, donating and serving breakfast and lunch to each of the day's 3,000 volunteers.

That trend continued in November, when 92 percent of employees at Delaware North's global headquarters in Buffalo, N.Y., participated in the company's 2018 employee campaign for the United Way of Buffalo & Erie County. The total number of participating associates increased by 148 (or 26.6 percent) over 2017.

"This is a fitting time to celebrate the generosity of our associates and our company's collective impact on our hometown. It is particularly gratifying to share that our 2018 campaign achieved the highest participation rate in Delaware North's long history of supporting the United Way," said Delaware North Co-CEOs Jerry Jacobs Jr. and Lou Jacobs in an announcement to the company.

"We know that you work hard every day to live our company's values, and your United Way participation is a great example of how we reflect these values back to our community."



“Plastic waste is a well-known problem when it comes to environmental pollution, with more than 80 percent of the harmful debris found in our oceans coming from plastic products.”

DEB FRIEDEL
DIRECTOR OF SUSTAINABILITY, DELAWARE NORTH

‘THE LAST STRAW’ FOR PLASTIC WASTE

In advance of Earth Day 2018, Delaware North announced a commitment to reduce plastic waste by scaling back its use of straws at the company’s 200-plus dining locations at 23 airports and travel hubs across the United States. Dubbed “The Last Straw” campaign, the initiative seeks to curb excess plastic waste by offering drinking straws on a request-only basis.

“Plastic waste is a well-known problem when it comes to environmental pollution, with more than 80 percent of the harmful debris found in our oceans coming from plastic products,” said Deb Friedel, Delaware North’s director of sustainability. “It’s estimated that more than 500 million straws are used and discarded every day in the United States, many of which end up in landfills and waterways. Skipping a straw is a small and easy step that can have a ripple effect — we hope this campaign continues to catch on and change the way we think about waste and its impact on the environment.”

Soon after, each of the company’s other operating divisions also adopted The Last Straw program. Delaware North hopes to sustain the campaign and cut down on the estimated 28 million plastic drinking straws the company served in drinks to guests at the company’s dining locations in 2017.

THE LAST STRAW

To reduce plastic waste, straws are available upon request.

Plastic straws are one of many items that contribute to the 8 million metric tons of plastic waste impacting our oceans each year.

#thelaststraw #delawarenorth



Great American Ball Park | Cincinnati

DELAWARE NORTH SPORTSERVICE DONATED \$100,000 AND NEARLY 43,000 CLOTHING ITEMS TO HURRICANE VICTIMS



Donation coordinated by the Delaware North team at Globe Life Park | Arlington, Texas

DELAWARE NORTH EFFORTS CONTRIBUTE TO BALLPARKS EARNING INDUSTRY SUSTAINABILITY AWARDS

Delaware North Sportservice and the Cincinnati Reds earned a prestigious award from the U.S. Environmental Protection Agency (EPA) for food recovery efforts during the 2017 season at Great American Ball Park.

The EPA gives out annual awards as part of its Food Recovery Challenge, and Great American Ball Park and its food, beverage and retail partner, Delaware North Sportservice, earned one of the Northeast Region designations. Food waste tonnage was reduced by more than 5 percent, with excess food being donated to community organizations.

Another venue at which Delaware North Sportservice operates was also the recipient of a major environmental designation as the U.S. Green Building Council (USGBC) awarded Oriole Park at Camden Yards with Leadership in Energy and Environmental Design (LEED) Gold certification for an existing building. Delaware North Sportservice, which has provided food, beverage and retail services at the ballpark since 2011, was part of the multiyear effort of research and enhancements along with the Baltimore Orioles to earn this certification.

Oriole Park at Camden Yards joins Target Field in Minneapolis — where Delaware North is also the food, beverage and retail partner — in achieving LEED Gold status.

DELAWARE NORTH DONATES TO DISASTER RELIEF EFFORTS

After devastating storms struck Texas, Florida and other parts of the Southeast in late 2017, Delaware North gave generously to the affected communities.

Delaware North Sportservice donated \$100,000 and nearly 43,000 clothing items to help with disaster relief efforts after Hurricane Harvey. The massive donation was coordinated by Delaware North’s team at Globe Life Park in Arlington, Texas, and accomplished through the generosity of partners spanning all four major professional sports leagues in the United States. The donation went directly to the Salvation Army, which distributed the items to affected areas.

A month later, the company donated an additional \$100,000 to assist communities throughout Florida damaged by Hurricane Irma. The company has long operated diverse businesses across the state, including Kennedy Space Center Visitor Complex, restaurants at Fort Lauderdale-Hollywood International Airport and Tampa International Airport, food and retail services at Amalie Arena, food services at TIAA Bank Field, restaurants in Disney Springs and Walt Disney World, and gaming properties Daytona Beach Racing & Card Club and Orange City Racing & Card Club.

SOUTHLAND GAMING & RACING CONTINUES CHARITABLE STREAK

Southland Gaming & Racing, owned and operated by Delaware North in West Memphis, Ark., presented Arkansas State University (ASU) Mid-South with \$100,000 in support of the Jeremy M. Jacobs Hospitality Program.

The June 2018 donation was the seventh of 10 annual payments to the school, which named its hospitality building in honor of Delaware North's chairman.

"Their generosity continues to help our students tremendously," Debra West, chancellor of ASU Mid-South, said of Southland and Delaware North. "And we are certainly very appreciative of everything Delaware North and Southland have done to ensure a brighter future for our region."



Apart from the pledge to ASU Mid-South, Southland hosted a charity dinner for the Ronald McDonald House Charities of Memphis and sponsored a Relay for Life event in 2018.

SPORTSERVICE JOINS THE GREEN SPORTS ALLIANCE

In 2018, Delaware North Sportservice made an even stronger commitment to maintaining its high standards when it comes to sustainability efforts by joining the Green Sports Alliance (GSA), an international coalition of sports teams, venues and other corporate partners dedicated to positive environmental change.



Sportservice already employs rigid sustainability and environmental practices across the 50-plus sports venues around the world at which it operates through five key categories: environmental management, asset protection, interpretation and education, community outreach, and healthy living.

The GSA uses the cultural and market influence of sports to promote healthy, sustainable communities where people live and play. The group inspires professional sports leagues, college conferences, sports governing bodies, colleges, teams, venues, their partners and millions of fans to embrace renewable energy, healthy food, recycling, water efficiency, safer chemicals and other environmentally preferable practices.

Sportservice is joining a vast network of similar-minded sports organizations. The GSA boasts a robust membership, with more than 400 members composed of 193 sports teams, 194 venues, 16 leagues, and dozens of companies and other corporate partners from 14 countries around the world.

PARKS AND RESORTS LOCATIONS FIND CREATIVE SOLUTIONS TO REDUCE FOOD WASTE

Delaware North has installed an Earth Flow composting unit in Shenandoah National Park, where the company operates food and beverage services, retail and lodging for the National Park Service. The need for a new composting solution arose when Delaware North's compost partner near the park closed for business, and the situation was further complicated by Shenandoah's remote location, the distance between Delaware North's facilities within the park, and concerns over wildlife intrusion.

In researching options, Delaware North's team at Shenandoah discovered Green Mountain's intermodal Earth Flow, an in-vessel composting unit. This system uses aeration and an automated auger in a sealed vessel to expedite the composting process (from six months to 14-21 days) and yield a very consistent end product. The system is solar powered, which also allows Delaware North's operations at the park to compost more items, and to take a significant step forward in its goal of producing zero landfill waste.

The compost program is a closed loop system. The end product is nutrient-rich soil, which is used to landscape Delaware North property, given to the National Park Service for use in its nurseries, and donated to local non-profit farms in the area.

Several other Delaware North parks and resorts properties have introduced upcycling digesters into their kitchens, including Kennedy Space Center Visitor Complex, The Gideon Putnam and The Ridgeline Hotel Estes Park. In total, the division diverted approximately 500,000 lbs. of food waste from landfills in 2018.

Delaware North has installed an Earth Flow composting unit in Shenandoah National Park, where the company operates food and beverage services, retail and lodging for the National Park Service.



“We look forward to this new partnership with Delaware North, which will build upon our long-standing presence in airports across the country and raise awareness about the USO.”

MICHAEL HOAR
USO VICE PRESIDENT OF CORPORATE ALLIANCES

DELAWARE NORTH PARTNERS WITH USO FOR NATIONAL FUNDRAISING CAMPAIGN

Beginning Memorial Day weekend, Delaware North rolled out a fundraising alliance with the United Service Organizations (USO) at 17 of the airports at which the company operates throughout the United States. The campaign ran until the end of 2018.

The fundraiser made a call for donations through three methods at Delaware North's 200-plus airport dining locations, with all proceeds going to benefit the USO and its mission: Guests could “round up” to the nearest dollar amount while making purchases; guests could purchase a limited-edition commemorative USO beverage cup; and money collection stations were set up at all points of sale for additional donations.

“We look forward to this new partnership with Delaware North, which will build upon our long-standing presence in airports across the country and raise awareness about the USO,” said Michael Hoar, USO vice president of corporate alliances, upon its announcement. “This opportunity invites the general public to be a ‘Force Behind the Forces’ to help keep service members connected to the things they hold so dear.”

ROCKEFELLER CENTER DINEAROUND RAISES NEARLY \$900,000

Chefs from around the world — including several from Patina Restaurant Group — gathered at Rockefeller Center in New York City over the summer for the 33rd annual Chefs’ Tribute to Citymeals on Wheels, hosted by longtime Patina executive Nick Valenti.

The event was attended by 1,000 guests and raised nearly \$900,000 for the nonprofit organization, which provides hand-delivered meals to the city’s homebound elderly.

Patina Restaurant Group, which operates the outdoor plaza on which the event was held, spearheaded the execution of the event. Several Patina chefs contributed to the evening’s culinary offerings, as did high-profile chefs such as Jonathan Waxman, Larry Forgione, Daniel Boulud, Scott Conant and Dale Talde.

Noted culinarians from more than a dozen countries around the world also contributed an international flair to the event.

DELAWARE NORTH MAKES A MILLION-DOLLAR PROMISE

In July, Delaware North Chairman Jeremy M. Jacobs announced the company’s \$1 million donation to Buffalo Promise Neighborhood, an initiative led by M&T Bank to support educational and economic opportunities in an underserved neighborhood within the city of Buffalo.

The partnership between M&T and Delaware North supports the new Buffalo Promise Neighborhood Children’s Academy at Gerard Place, which opened in September.

Approximately 100 children attend the new Children’s Academy, including those who live within the Buffalo Promise Neighborhood service area, have siblings who attend one of the Buffalo Promise Neighborhood schools or those whose parents are residents of Gerard Place.

“This donation will help us make an impact in the lives of more children and families in the community we serve,” said David K. Chamberlain, vice chairman of the Westminster Foundation and CEO of Buffalo Promise Neighborhood. “We greatly appreciate the time, leadership and financial contributions Delaware North has dedicated to our work.”



Hartsfield-Jackson Atlanta International Airport



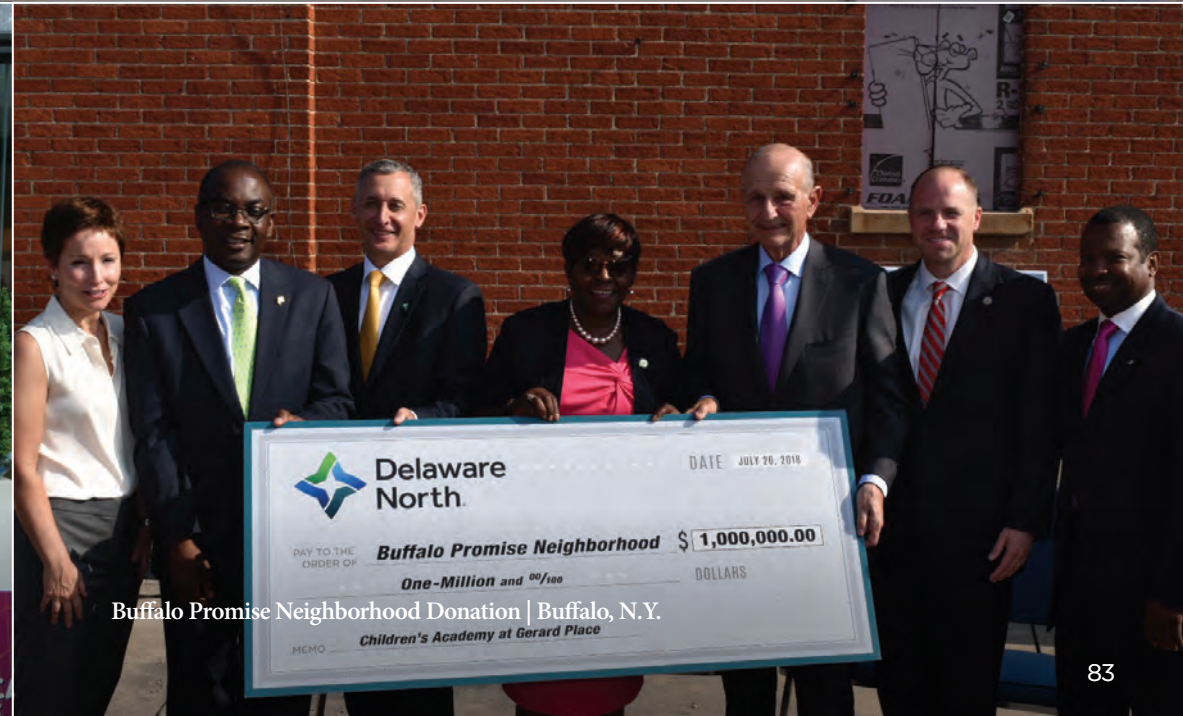
200-PLUS
DINING LOCATIONS
IN 17 AIRPORTS
WERE PART OF THE
USO FUNDRAISING
ALLIANCE



Chefs’ Tribute to Citymeals on Wheels | Rockefeller Center, New York



Chefs’ Tribute to Citymeals on Wheels | Rockefeller Center, New York



Buffalo Promise Neighborhood Donation | Buffalo, N.Y.



Jeremy M. Jacobs is inducted into the Hockey Hall of Fame in Toronto (November 17, 2017)

Awards and Recognition

JACOBS FAMILY

Jeremy M. Jacobs, chairman of Delaware North, is awarded the Nathan Benderson Community Leadership Award from the Jewish Federation of Greater Buffalo. (Oct. 19, 2018)

Margaret “Peggy” Jacobs, wife of Delaware North Chairman Jeremy Jacobs, receives the Frederick Law Olmsted Legacy Award at the Buffalo Olmsted Parks Conservancy’s annual gala. (Sept. 14, 2018)

Charlie Jacobs, CEO of Delaware North’s Boston Holdings and the Boston Bruins, leads a historic \$1 million pledge to create an enduring partnership between the Boston Bruins Foundation and Special Olympics Massachusetts. (Aug. 28, 2018)

Lou Jacobs, Co-CEO of Delaware North, joins the board of directors for the Food Bank of Western New York, which helps to feed 140,000 people annually in four western counties of New York State. (Aug. 2, 2018)

Jerry Jacobs Jr., Co-CEO of Delaware North, is invited to join a new “Made in America” Recreation Advisory Committee, a national park-focused committee created by the U.S. Secretary of the Interior, Ryan Zinke. (April 6, 2018)

Jeremy M. Jacobs, chairman of Delaware North, earns the top spot on *Buffalo Business First’s* “Power 250” list, which ranks the most important figures in business, politics and government throughout the Buffalo region. (Feb. 16, 2018)

Jeremy M. Jacobs, the longtime owner of the Boston Bruins and chairman of the NHL’s Board of Governors, is inducted into the Hockey Hall of Fame. (Nov. 17, 2017)

Jeremy M. Jacobs is inducted into the Western New York Business Hall of Fame as part of an inaugural class of 15 historic figures. (Nov. 17, 2017)

During the 2017 Global Sports Summit in Aspen, Colo., **Jeremy M. Jacobs** is awarded a Lifetime Achievement Award. (July 21, 2017)

VENUES & LEADERSHIP

Scott Knight, Delaware North’s general manager at Atlanta-Hartsfield Jackson International Airport, is recognized by the Atlanta Department of Aviation as GM of the Year among all concessionaires at the airport. (Dec. 21, 2018)

Delaware North owned-and-operated **Tenaya Lodge at Yosemite** is named one of the 20 top resorts in Northern California in the annual 2018 Condé Nast Readers’ Choice Awards. (Dec. 14, 2018)

Amy Latimer, president of TD Garden, is named a Greater Boston Chamber of Commerce 2019 Pinnacle Awards honoree for Outstanding Achievement in Management, Private. (Dec. 14, 2018)

Major League Baseball awards the **Cincinnati Reds and Delaware North Sportservice**, the official food, beverage, and retail provider at Great American Ball Park, with the 2018 Hard Goods Retailer of the Year Award. (Nov. 16, 2018)

The Green Restaurant Association certifies five Delaware North-operated restaurants at **Grand Canyon National Park** for their positive steps in reducing environmental impact. (Nov. 8, 2018)

Delaware North and **The Westin Buffalo** receive an Operational Excellence award during Marriott International’s 2018 Marriott International Association & Full-Service Owners Conference. (Nov. 2, 2018)

The New York League of Conservation Voters honors **Delaware North** for its work in protecting and conserving New York’s environment. (Oct. 26, 2018)

Delaware North General Counsel **William Hochul** is presented with the ACC Litigation Network’s Leadership Award for 2017-2018. (Oct. 26, 2018)

Kim Florence, Delaware North’s regional president and general manager for its two West Virginia casinos, is honored by the YWCA of Wheeling during its annual “Tribute to Women” event. (Oct. 19, 2018)

Buffalo Niagara International Airport earns the best customer satisfaction score among medium hub airports in North America in a study conducted by J.D. Power. (Sept. 21, 2018)

Venues Now awards **Miller Park** in Milwaukee the Best Sustainability Initiative Award for its biodigestion system, which was installed by Delaware North, as part of the magazine’s 2018 Excellence in Concession Awards. (Sept. 14, 2018)

Adelaide Airport in Australia honors **Delaware North** with an award for Food & Beverage Retailer of the Year at the airport’s 2018 Retailer of the Year Awards. (Aug. 31, 2018)

Wes Trump, director of the Art & Style department at Delaware North, is named to *design:retail* magazine’s annual 40 Under 40 list. (May 25, 2018)

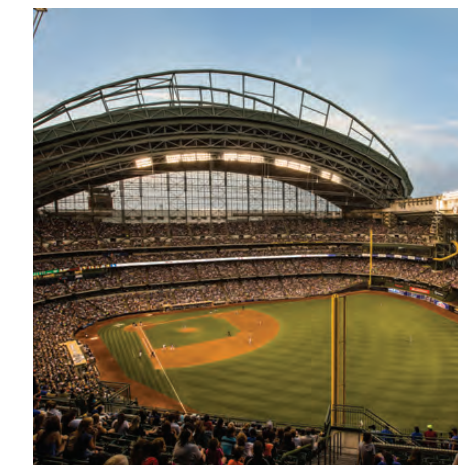
Delaware North food and beverage operations at **Target Field, Globe Life Park** in Arlington and **Progressive Field** earn the top three spots in People for the Ethical Treatment of Animals’ Top 10 Vegan Friendly Ballparks list for 2018. (June 8, 2018)

Delaware North owned-and-operated **Sea Crest Beach Hotel** in North Falmouth, Mass., is ranked as Best Family Lodging on the Upper Cape in *Cape Cod Life* Publication’s annual Best of Cape Cod & the Islands Readers’ Choice Awards. (June 1, 2018)

Lynchburg Living, a regional magazine in Virginia, awards **Peaks of Otter Lodge** on the Blue Ridge Parkway the “Best Rehearsal Dinner” and “Best Wedding Reception Venue” in the magazine’s annual best of bridal contest. (May 18, 2018)



Cooper's Alehouse at Adelaide Airport | Australia



Miller Park | Milwaukee



Kennedy Space Center Visitor Complex | Cape Canaveral, Fla.



The Westin Buffalo | Buffalo, N.Y.

Delaware North's The Westin Buffalo was ranked by guests as the most likely Westin hotel they intend to recommend in North America.

Delaware North's **Patina Restaurant Group** is named as one of the 25 most powerful multiconcept restaurants by *Restaurant Hospitality Magazine*. It was listed under the Destination Driver section and praised for its "attention grabbing restaurants in landmark locations." (May 11, 2018)

Great American Ball Park, where Delaware North operates food and retail services for the Cincinnati Reds, earns a prestigious award from the U.S. Environmental Protection Agency (EPA) for its food recovery efforts throughout 2017. (May 11, 2018)

Target Field and **Oriole Park at Camden Yards** earn LEED Gold certifications in 2017 and 2018, respectively, for efforts in being environmentally friendly. (May 12, 2017; May 11, 2018)

Wembley Stadium in London earns a five-star rating from the annual government-mandated audit by an environmental health officer for the hygiene and safety of the stadium's food and hospitality. (Apr. 20, 2018)

Delaware North's team at **Kennedy Space Center Visitor Complex** receives a near perfect score from NASA in the annual evaluation of the park's operations. (March 30, 2018)

Delaware North's team at **Minneapolis-St. Paul International Airport** earns the 2017 Merchant of the Year award and Best Sustainability Program Award for its food and beverage operations, specifically the Smack Shack. (Feb. 16, 2018)

Delaware North's **The Westin Buffalo** was ranked by guests as the most likely Westin hotel they intend to recommend to friends in North America. (Feb. 2, 2018)

Eight Delaware North-operated airport concepts were nominated for *USA Today's* 2017 10 Best Readers' Choice Awards. They were nominated in sections such as Best Airport Grab-and-Go Dining and Best Airport Local/Regional Dining. (Jan. 26, 2018)

Delaware North's **Angel Food Bakery & Donut Bar** wins a STARR award from the Minnesota Shopping Center Association for its open-concept interior design. (Dec. 8, 2017)

USA Today's sports blog, For the Win, places Delaware North-owned-and-operated **TD Garden's** Topped French Fries and Cotton Candy Waffle Cone among its "top 10 craziest foods found at an NBA and NHL arena." The foods took seventh- and ninth-place honors, respectively. (Nov. 3, 2017)

Delaware North's revamped operations at **Miller Park** are named as the Best New Concessions Experience of 2017 by *Ballpark Digest*. (Oct. 13, 2017)

Glasgow Airport becomes the first Scottish airport to earn the acclaimed Taste Our Best certification thanks to Delaware North's Scotland & Sea food court.

SunTrust Park is named as the Ballpark of the Year by *Ballpark Digest* for its hospitality and food options, both of which are provided by Delaware North. (Sept. 22, 2017)

Sports & Leisure Catering magazine awards Delaware North with Event Caterer of the Year for its food and beverage operations during the **2016 NFL series at Wembley Stadium** during the SLC awards. (Sept. 22, 2017)

The Green Restaurant Association certifies three Delaware North locations at **Yellowstone National Park**. The award was given for the restaurants' steps in reducing environmental impact. (Sept. 1, 2017)

Adelaide Airport in Australia honors Delaware North with the awards for both Airport Retailer of the Year and Food & Beverage Retailer of the Year at the airport's 2017 Retailer of the year awards. (Aug. 25, 2017)

Buffalo Spree magazine lists **Patina 250** as the Best Restaurant Space (City) in its special "Best of Buffalo" edition. (Aug. 4, 2017)

Delaware North owned-and-operated **The Westin Buffalo** is awarded the AAA Four Diamond Rating. The rating is awarded to less than 5 percent of AAA hotels and signifies the hotel is one of the best when it comes to hospitality and service. (July 28, 2017)

Tenaya Lodge at Yosemite is awarded the prestigious "5 Green Keys" rating for its accomplishments in environmental management and corporate social responsibility. (July 28, 2017)

Glasgow Airport becomes the first Scottish airport to earn the acclaimed Taste Our Best certification thanks to Delaware North's Scotland & Sea food court. (June 16, 2017)

Delaware North food and beverage operations at **Globe Life Park** in Arlington, **Target Field** and **Oriole Park at Camden Yards** earn first-, second- and eighth-place honors, respectively, in People for the Ethical Treatment of Animals' Top 10 Vegan Friendly Ballparks list for 2017. (May 26, 2017)

The Butler County Board of Developmental Disabilities names Delaware North's **Miami Valley Gaming** as its Employer of the year. It received the award for its employment of several individuals with disabilities. (May 5, 2017)

Jumer's Casino & Hotel earns 16 Choice Awards in 2017 in *Casino Player Magazine's* Best of Gaming Poll for the region. It then received another 13 awards in the 2018 poll. Of the awards, it received first place in Best Hotel, Best Rooms, and Best Players Club among others. (Sept. 22, 2017; June 1, 2018)



Tenaya Lodge at Yosemite | Fish Camp, Calif.



Miami Valley Gaming | Lebanon, Ohio

Executive Team and Corporate Information

DELAWARE NORTH JACOBS FAMILY LEADERSHIP

Jeremy M. Jacobs
Chairman
Delaware North

Jeremy M. Jacobs Jr.
Co-Chief Executive Officer
Delaware North

Louis M. Jacobs
Co-Chief Executive Officer
Delaware North

Charles M. Jacobs
Chief Executive Officer
Delaware North's Boston Holdings

DELAWARE NORTH EXECUTIVE LEADERSHIP

Christopher J. Feeney
Executive Vice President
and Chief Financial Officer

James Houser
Executive Vice President
and Chief Operating Officer

Frank Mendicino
Executive Vice President
and Chief Administrative Officer

Maureen Sweeny
Executive Vice President
and Chief Development Officer

DELAWARE NORTH CORPORATE LEADERSHIP AND OFFICERS

Rick Abramson
Chief Customer Officer

Stephen Harrington
Chief Procurement Officer

William Hochul
Senior Vice President, General Counsel
& Secretary

Michael McCabe
Chief Compliance Officer

Jack McNeill
Senior Vice President
of Government & External Affairs

Todd Merry
Chief Marketing Officer

Eileen Morgan
Chief Human Resources Officer

Yvette Vincent
Chief Technology Officer

Jeff Wilkinson
Chief Information Officer

Robert Wilson
Senior Vice President
of Operational Excellence

BUSINESS DEVELOPMENT

Richard Ayson
Senior Vice President
of Business Development

James Obletz
Senior Vice President
of Corporate Development

Matthew Wagner
Senior Vice President
of Strategic Development

OPERATIONAL LEADERSHIP

Delaware North Sportservice
Carlos Bernal, President

Gaming
E. Brian Hansberry, President

Travel
Kevin Kelly, President

TD Garden
Amy Latimer, President

Boston Bruins
**Cam Neely, President and
Alternate Governor**

Parks and Resorts
Scott Socha, President

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United Kingdom
Doug Tetley, Managing Director

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