

Concessions 101

Doing Business at the Airport

Waypointe **TPA**
DINE · SHOP · EXPLORE



Agenda

- Introduction
- Hillsborough County Aviation Authority
- Tampa Bay Area
- Tampa International Airport
- Passenger Information
- Concessions Program
- Operating at Airports
- ACDBE Program
- Navigating Procurement
- Next Steps

Hillsborough County Aviation Authority



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Fundamentals of Our Business

Unique independent special district

- Single business purpose government
- Own, operate all public airports in the County

Federally regulated

- Must be self-sustaining
- Our revenues can only be used at the airport and must be tied to airport purposes; cannot go to other community projects
- Operations and maintenance costs not funded by taxpayer dollars



TPF

Peter O. Knight Airport

Annual Operations

150K



Hangars

335



VDF

Tampa Executive Airport



Based Aircraft

425



PCM

Plant City Airport



Economic Impact

\$563.4M

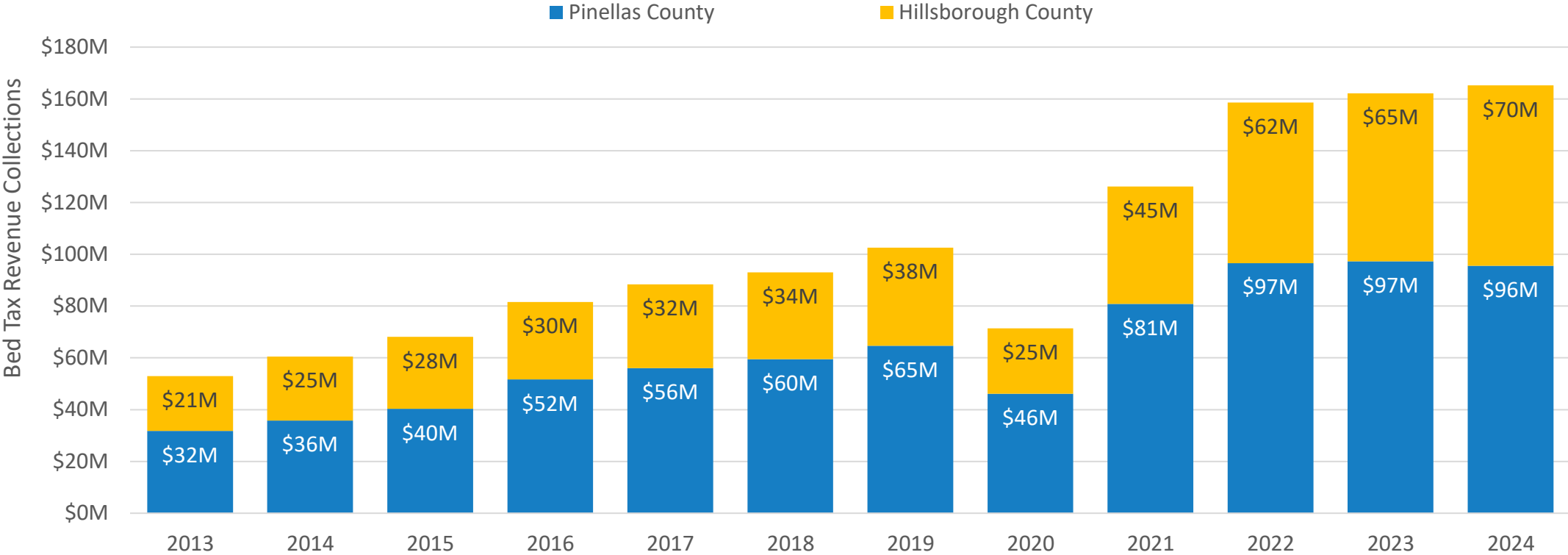
Mission Statement

Our mission is to be a major driver in the **economic growth** of the Tampa Bay region. We will be **leading-edge innovators** to create global access and **extraordinary customer experiences** through our people and facilities to build **prosperity** for our stakeholders and the region.

Tampa Bay Area

Tourism Revenue Growth Across Tampa Bay

Destination Marketing Organization Annual Bed Tax Collections



Source: Visit Tampa Bay and Visit St. Pete Clearwater Data

Tampa Bay Tourism Data

Repeat Visitors
to Florida

95%



Prior Visits to
St. Pete/Clearwater

62% 1-10 Times

14% 11 times or more



Top 5 Factors in Decision to Visit Destination

- 1. Area Attractions **(34%)**
- 2. Beaches **(33%)**
- 3. Weather **(24%)**
- 4. Overall ambiance & atmosphere **(23%)**
- 5. Friends or family in the area **(22%)**

Top 10 Most Liked Aspects of Destination



- 1. Beaches/Ocean **(16%)**
- 2. Scenic Beauty **(14%)**
- 3. Attractions **(14%)**
- 4. Relaxing atmosphere/Ambiance **(11%)**
- 5. Entertainment/Variety of activities **(11%)**
- 6. Accessible/Convenient/Walkable **(9%)**
- 7. Family friendly **(6%)**
- 8. Tropical climate/Warm weather **(6%)**
- 9. Everything **(5%)**
- 10. Food Restaurants & Bars **(4%)**

Sources: Visit St. Pete/Clearwater 2024 Visitor Profile & Economic Impact Study

Community Events



Estimated attendees in 2026

425,000



Estimated attendees in 2026

600,000



Estimated attendees in 2026

300,000+



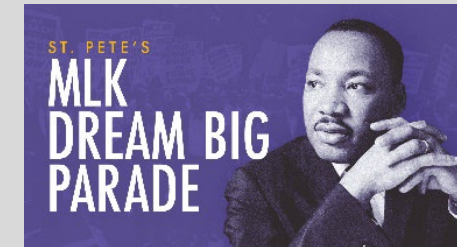
Estimated attendees in 2026

200,000



Estimated attendees in 2025

350,000



St. Pete has the **nation's longest-running MLK Parade**

Professional Sports Teams



Tampa Bay's Largest Employers

Company	Industry	Est. Local Employees	Est. Global Employees	Company	Industry	Est. Local Employees	Est. Global Employees
Publix (No. 78 on Fortune 500)*	Retail Trade	46,500	255,000	Aetna Global Benefits	Finance & Insurance	2,000	47,950
HCA Healthcare	Life Sciences & Healthcare	21,000	309,000	FIS Global	Finance & Insurance	1,800	65,000
MacDill Air Force Base*	Defense & Security	16,900	16,900	HSN Home Shopping Network	Wholesale Trade	1,700	28,170
Advent Health	Life Sciences & Healthcare	12,000	95,000	Charter Communications	Information	1,500	101,700
H. Lee Moffitt Cancer Center & Research Institute	Life Sciences & Healthcare	5,700	293,723	Valpak	Professional Services	1,500	1,500
Citi	Finance & Insurance	8,400	239,000	Nielsen Company	Professional Services	1,500	43,000
JPMorgan Chase	Finance & Insurance	6,200	309,926	One Touch Direct	Administrative	1,400	5,000
Raymond James Financial	Finance & Insurance	5,200	18,000	Macy's	Retail Trade	1,300	94,500
Bloomin' Brands	Leisure and Hospitality	5,100	87,000	PSCU	Finance & Insurance	1,300	3,400
Progressive Insurance	Finance & Insurance	5,000	61,400	Raytheon	Manufacturing	1,300	195,000
USAA	Finance & Insurance	3,900	37,000	Duke Energy	Utilities	1,250	27,859
Geico	Finance & Insurance	3,800	38,000	Truist Financial	Finance & Insurance	1,200	55,000
Bealls	Leisure & Hospitality	3,500	15,650	Hilton Reservations & Customer Care	Accommodations	1,050	159,000
PGT Custom Windows and Doors	Manufacturing	3,233	5,456	IBM	Professional Services	1,000	288,000
Morgan Auto Group	Automotive Retail	3,208	6,526				
Suncoast Credit Union	Finance & Insurance	2,503	2,503				
TECO Energy	Utilities	2,500	2,500				
Rooms-to-Go	Retail Trade	2,200	8,600				
Metlife Financial	Finance & Insurance	2,000	45,000				
Suncoast Credit Union	Finance & Insurance	2,355	2,355				
Jabil (No. 121 on Fortune 500)	Professional Services	2,000	250,000				
TD Synnex	Professional Services	2,000	23,500				
Honeywell Aerospace	Manufacturing	2,000	35,000				
Rooms-to-Go	Retail Trade	2,000	8,400				
MetLife	Finance & Insurance	2,000	45,000				

*Companies HQ is in Tampa Bay



Source: 2024 Tampa Bay Business Journal, Uniworld Online and Economic Development Partners

Florida's Top Agricultural Products

Nationwide Rankings (value of production)



Floriculture Valencia oranges Sugarcane Watermelons Sweet Corn	Bell peppers All oranges Strawberries Tomatoes	Cabbage Grapefruit
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Product	Percent of U.S. Value	Value in Dollars
Valencia Oranges	51%	\$124 million
Watermelons	34%	\$264 million
Bell Peppers	31%	\$188 million
Grapefruit	28%	\$46.7 million
Sweet Corn	25%	\$253 million
All Oranges	20%	\$197 million
Total Floriculture Sales	18%	\$1.21 billion
Fresh Market Tomatoes	18%	\$494 million
Strawberries	13%	\$434 million
Cabbage	12%	\$69.2 million

Source: USDA National Agricultural Statistics Services

Tampa International Airport (TPA)



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TAMPA INTERNATIONAL AIRPORT

4 Airsides / 58 Gates



Annual Passengers

24,539,771

(FY25)

Daily Average **67,232**



23,000

Approx. Parking Spaces



Highest Traffic Month

March

2,462,255



66 Shops and
Restaurants



229,000,959

Pounds of Cargo and Mail

Calendar Year 2024



Lowest Traffic Month

October

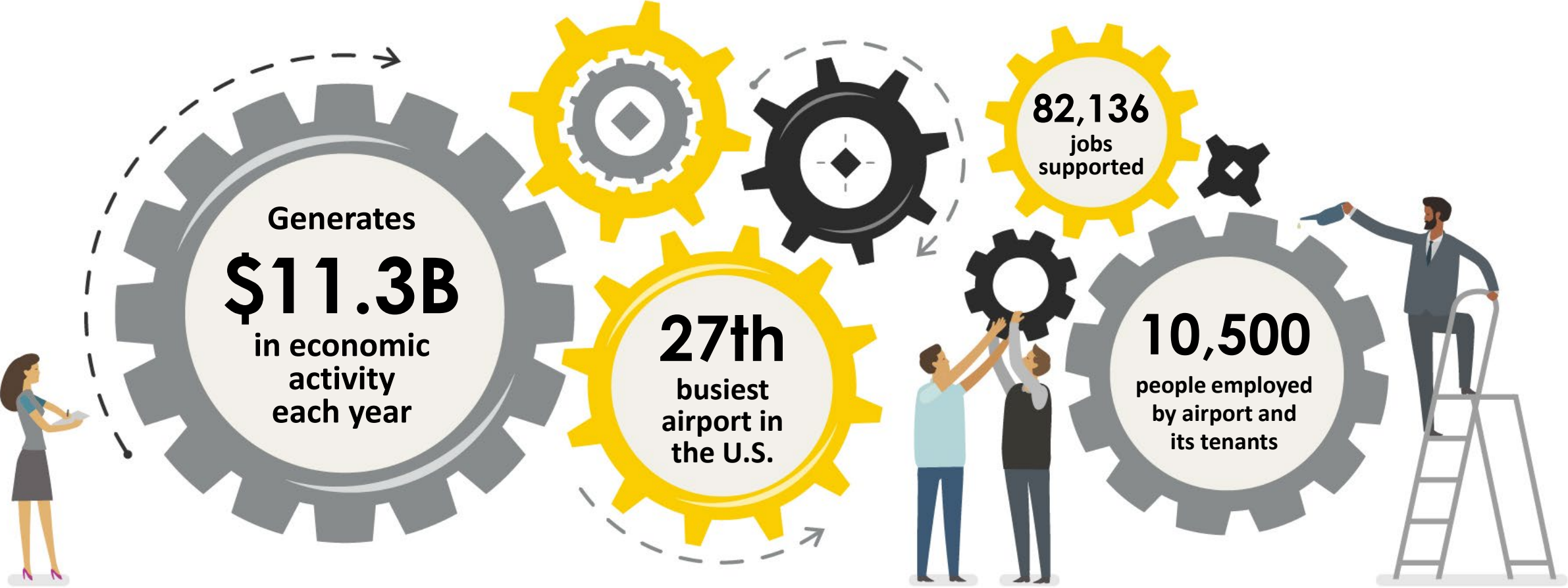
1,598,408



**3 General
Aviation Airports**

Peter O. Knight, Plant City,
Tampa Executive

TPA's Economic Impact



*Sources: FDOT Aviation Economic Impact Study 2022; FAA CY24 Enplanement Data

Airside D

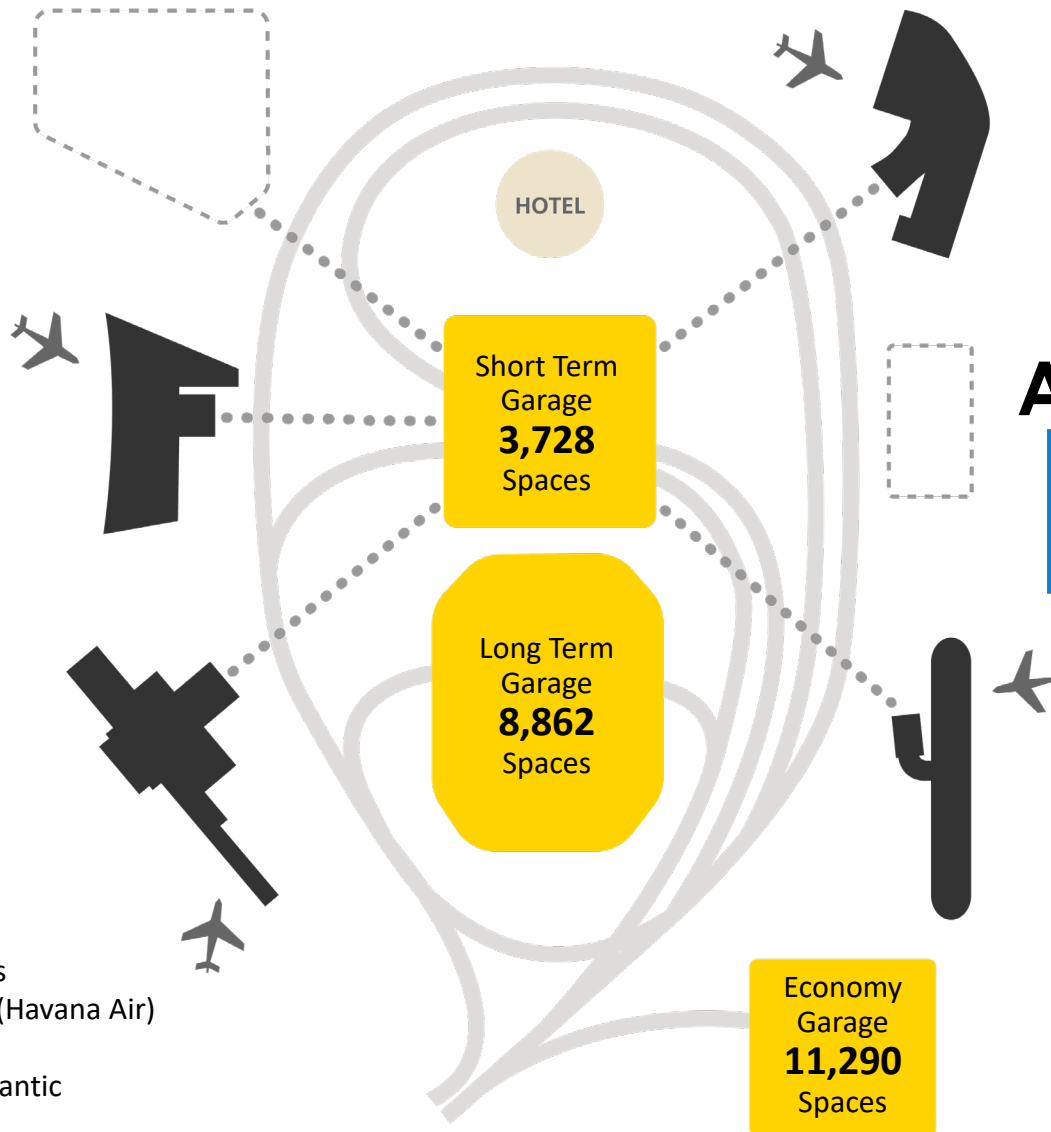
Opened in 1971
Demolished 2008
Planned 16-gate Airside D
scheduled to open in 2028

Airside E

13 Gates
Opened in 1971
Rebuilt 2002
6.9m PAX
Air Canada
Delta
Frontier

Airside F

14 Gates
Opened in 1987
5.0m PAX
Aeromexico
American
Avianca
British Airways
Cayman Airways
Copa Airlines
Discover
Edelweiss
Global X (Havana Air)
Porter
Virgin Atlantic
WestJet
World Atlantic (Invicta Air)



Airside C

16 Gates
Opened in 1971
Rebuilt 2005
6.7m PAX
Breeze Airways
Southwest

Airside B

Opened in 1971
Demolished 1990
Current site of Airside A
Baggage Sort Facility

Airside A

16 Gates
Opened in 1995
6.0m PAX
Alaska Airlines
Avelo Airlines
JetBlue
Spirit
Sun Country
United



TPA Nonstop Destinations

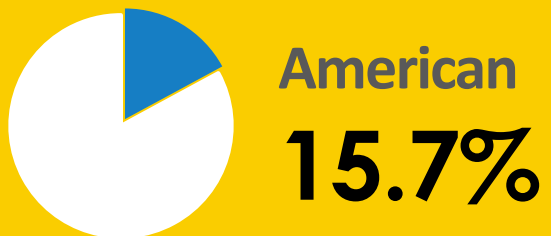
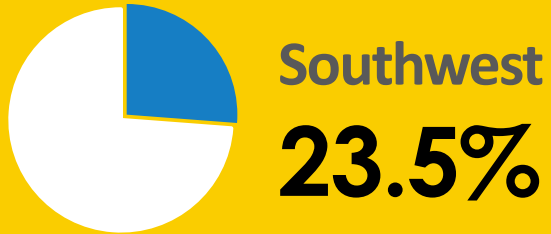
86 Domestic Destinations | 39 States

21 International Destinations | 12 Countries

107 Total Nonstop Destinations

as of August 2025

Top 3 Largest Airline Market Share by percentage



Fiscal Year 2025

500

Estimated Daily Flight Operations



Top 10 Markets for Tampa

1. New York
2. Chicago
3. Atlanta
4. Boston
5. Detroit
6. Philadelphia
7. Dallas/Ft. Worth
8. Denver
9. Washington, D.C.
10. Baltimore

Calendar Year 2024

MASTER PLAN



Phase 1: Decongestion 2013-2018

Complete

Rental Car Center
Automated People Mover
Main Terminal Expansion
Concessions Redevelopment



Phase 2: Enabling 2018-2025

Complete

Curbside Expansion
SkyCenter Development
Central Utility Plant
Roadway Expansion



Phase 3: Growth Construction 2024-2028

Underway

16-gate Airside D

New Airside D



Security Checkpoint



Oasis



NW Hold Room / Restaurant



Gourmet Market / News Convenience



International Arrivals / FIS



U.S. Customs and Border Protection

RESTROOMS

U.S. Customs and Border Protection
Tampa International Airport
Arrivals D

FIS Exit to Shuttle



?i
Information
Desk

Bag Recheck

ELEVATORS

← Shuttle to Terminal
Ground Transportation

←
The
ELEVATORS
for
Bag
Claim
Stations
are
located
here.
CAUTION:
Please
stand
on
the
steps
and
hold
on
to
the
rails.
Do
not
lean
against
the
rails.
Do
not
eat
or
drink
on
the
stairs.
Do
not
use
cell
phones
on
the
stairs.

Passenger Information

TPA's Catchment Area

4.3 million

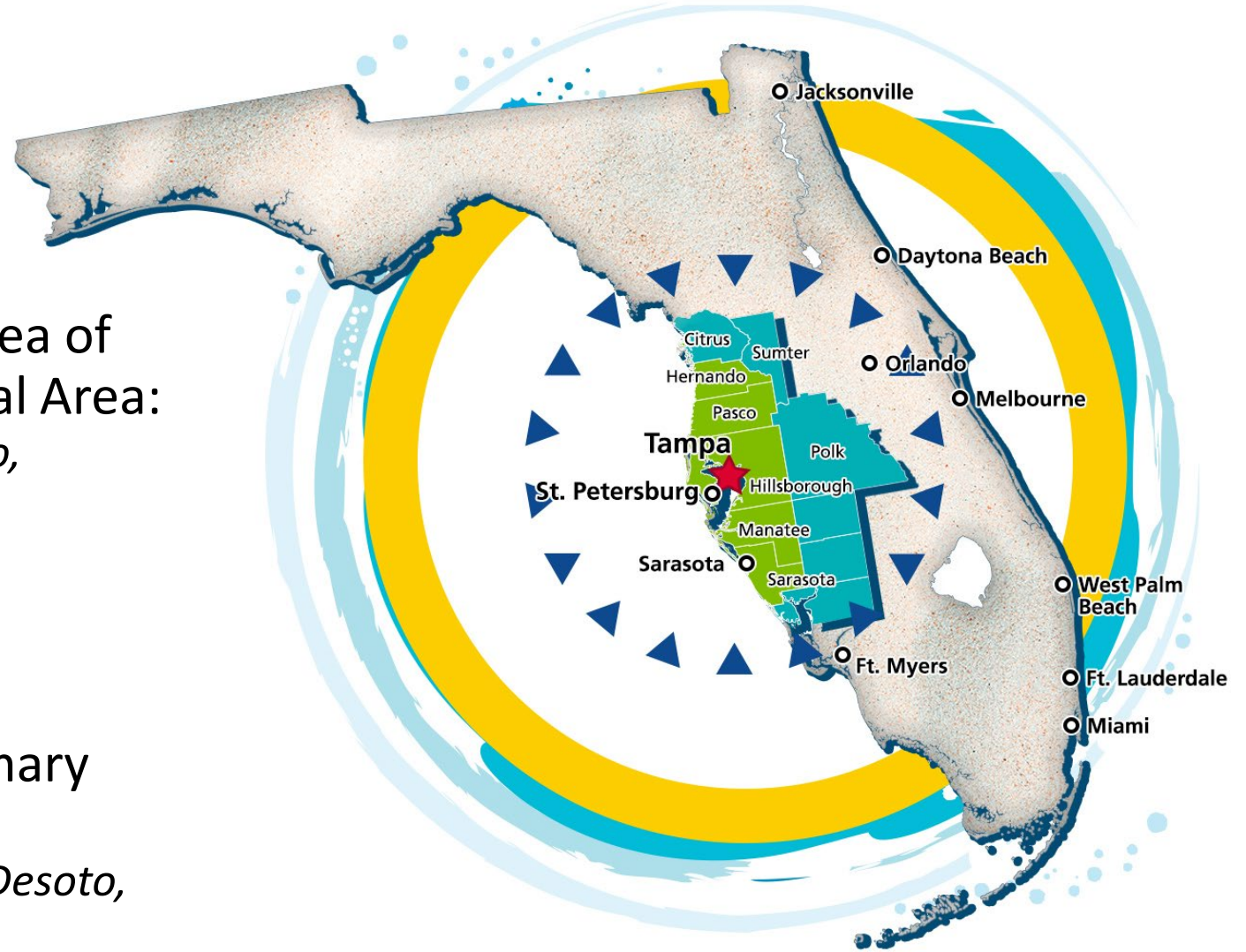
4.6 million by 2030

in 6-county primary catchment area of Tampa Bay Metropolitan Statistical Area:
Hernando, Hillsborough, Manatee, Pasco, Pinellas & Sarasota

5.7 million

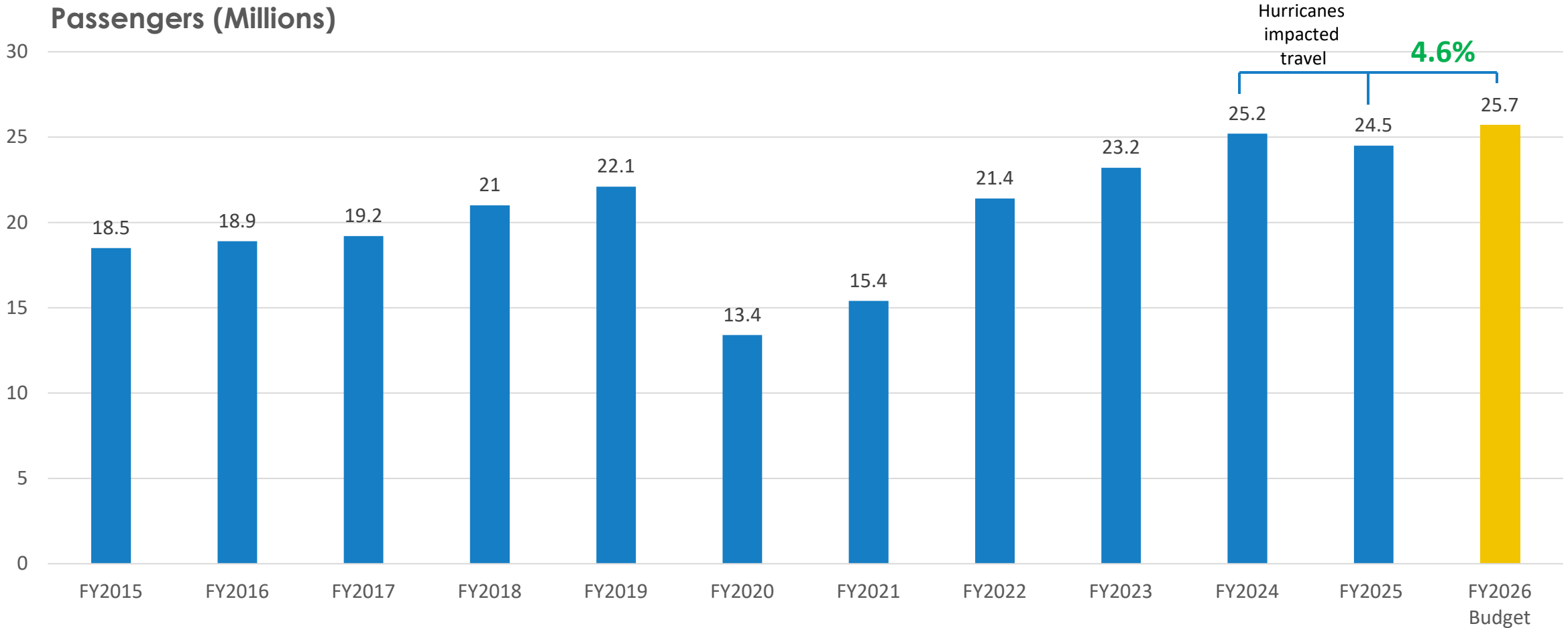
6.2 million by 2030

in 12-county area comprising primary and secondary catchments:
Primary counties plus Charlotte, Citrus, Desoto, Hardee, Polk and Sumter



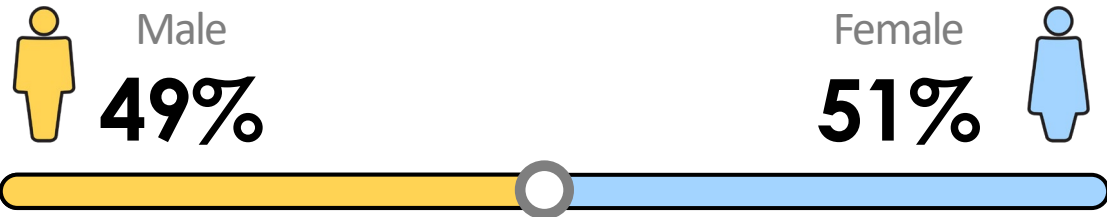
Passenger Traffic

Tampa International Airport is projected to handle 25,673,763 passengers during FY2026 which is a 4.6% increase in passengers from FY2025.

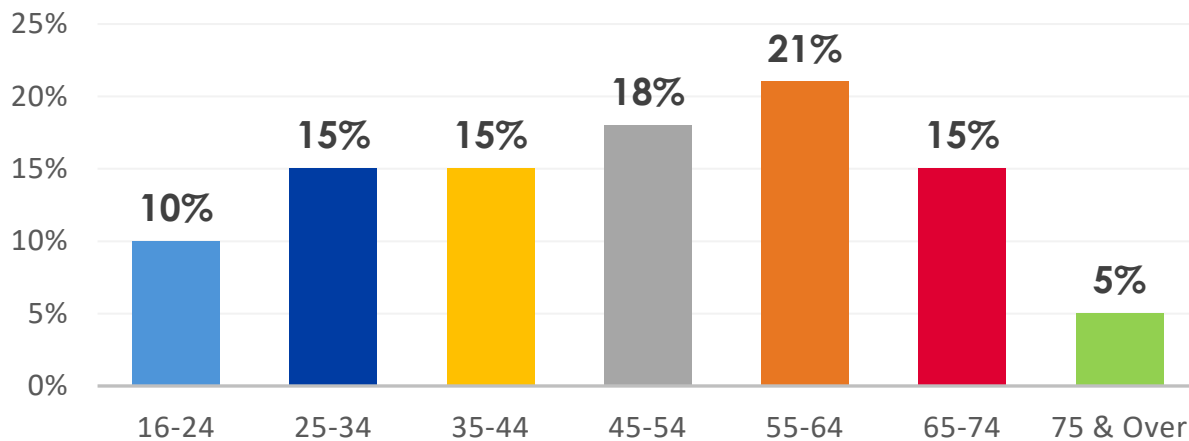


Passenger Demographics

Calendar Year 2024



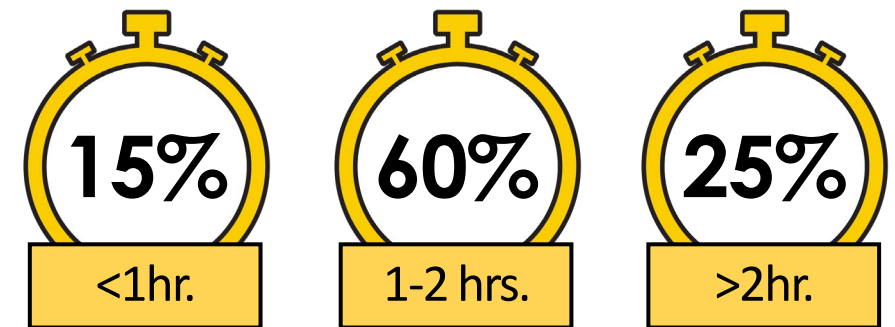
Age Group Distribution



Visitor vs. Local Traffic



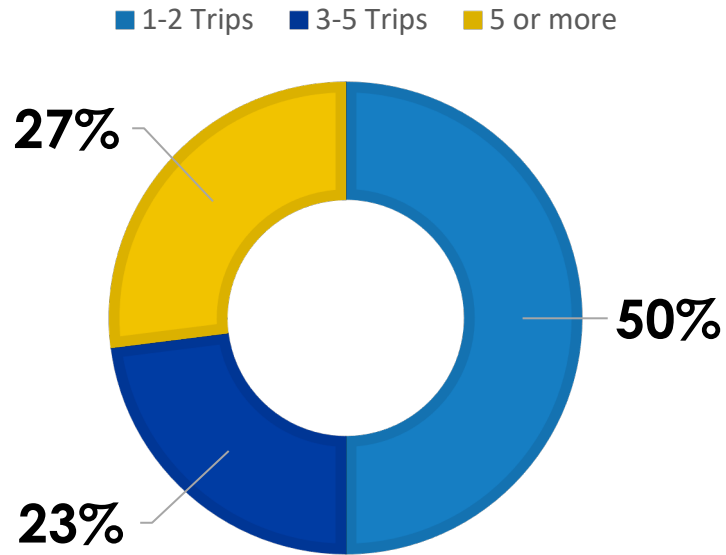
Dwell Time at TPA



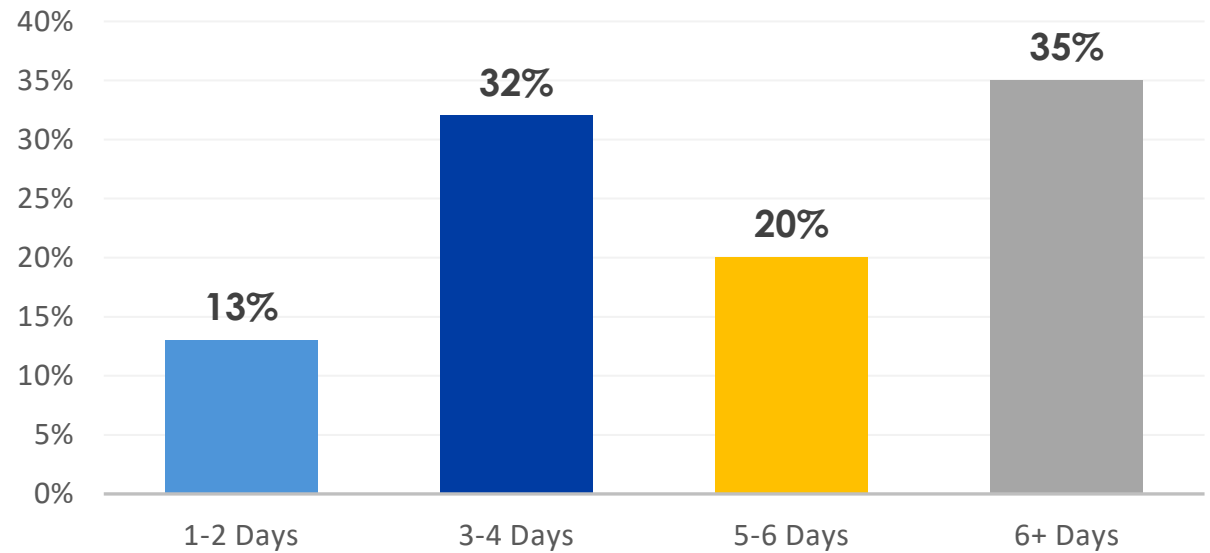
Passenger Demographics

Calendar Year 2024

Trips Per Year



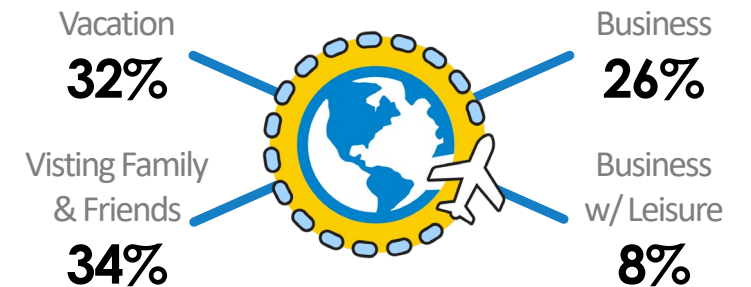
Length of Stay



Travel Party Size



Travel Purpose



Concessions Program



What are Airport Concessions?



“Concession” means a right to operate a business that sells goods and/or services to the public and includes sources of revenue such as:

- Food & Beverage Services
- Retail Merchandise
- Passenger Services
- Duty-Free Merchandise
- Foreign Currency Exchange Services
- Display Advertising Services
- Baggage Cart Services
- Hotel/Office Building Complex
- On-Airport and Off-Airport Rental Cars

Opportunities for Business

Direct Lease

Lease directly from an airport to operate the Concession.

Sub-tenant

Lease space from a larger concessions company.

Brand

Joint Venture

A partnership to lease and operate a concession.

License Agreement

License brand identity to a larger concessions company.



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66

Concessions Locations
34 Food & Beverage
32 Retail



~101,000 sf
of Concessions space

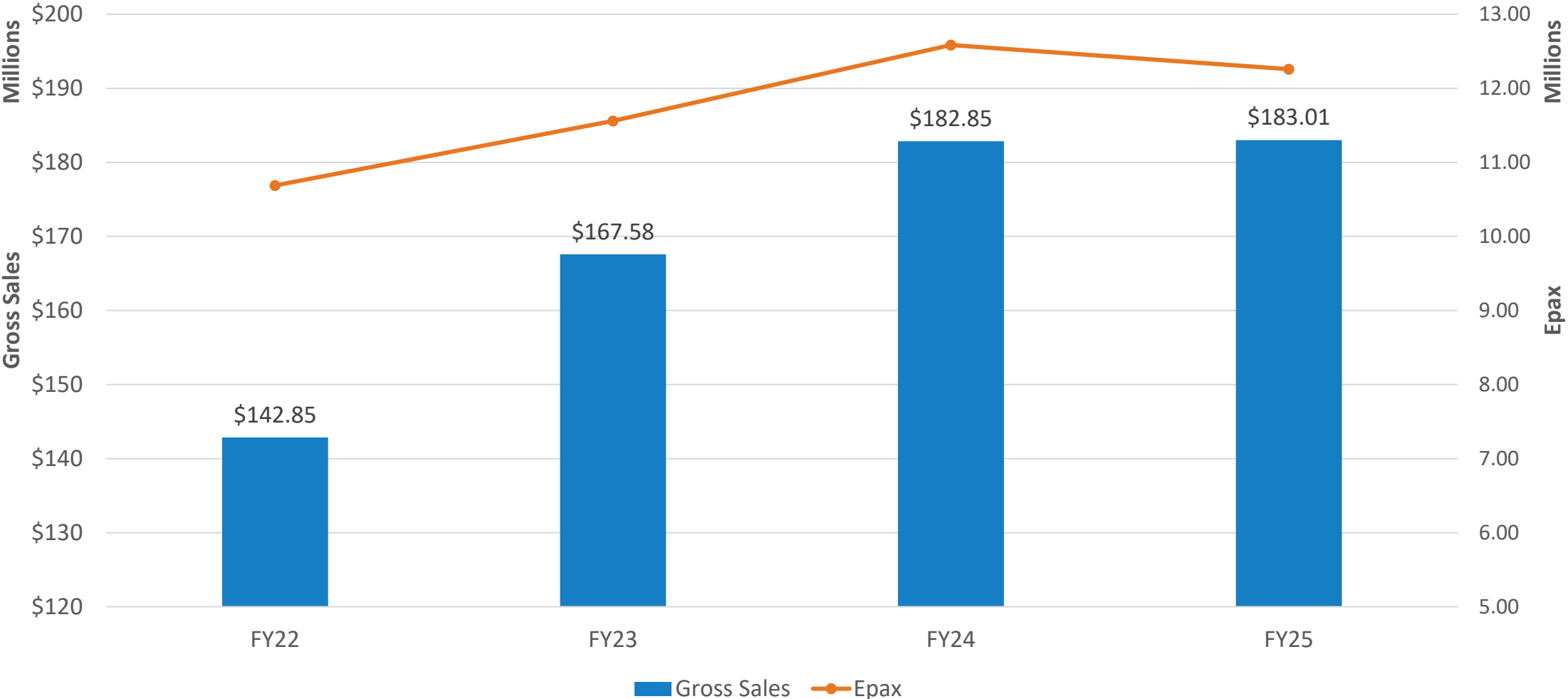


\$183M
FY25 gross receipts

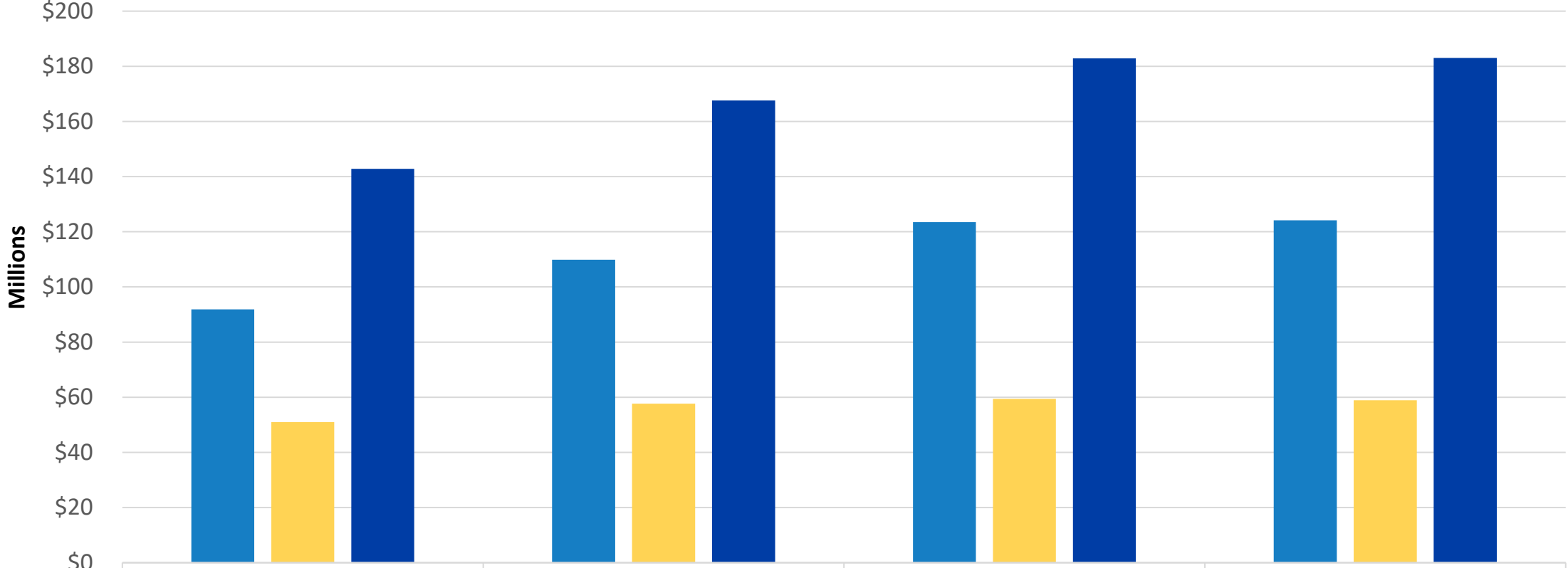


**Award
Winning**

Concessions Sales History

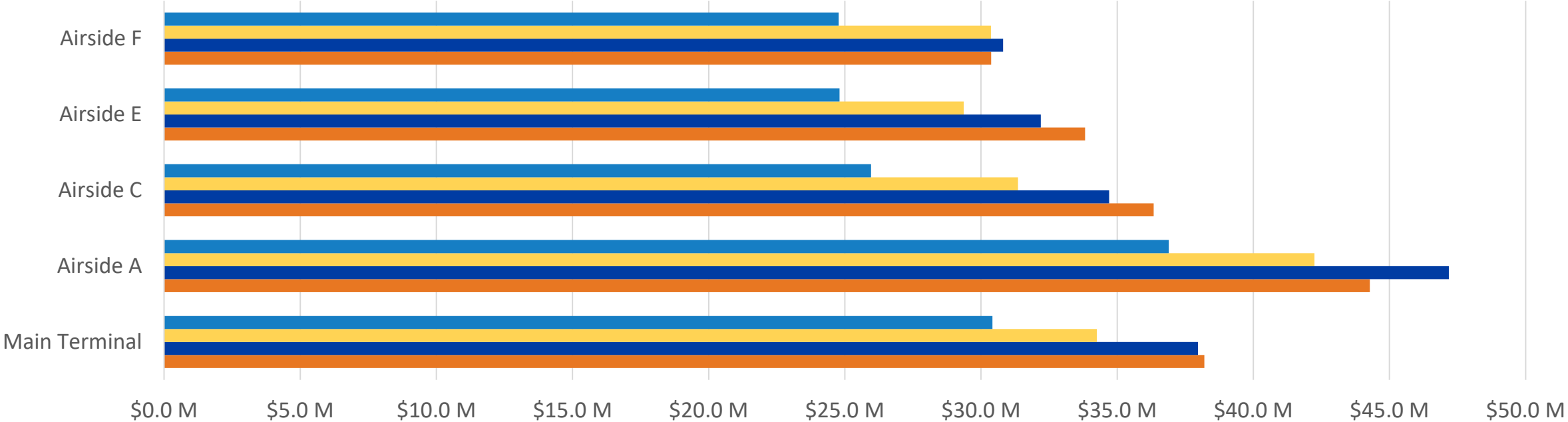


Concessions Sales by Product



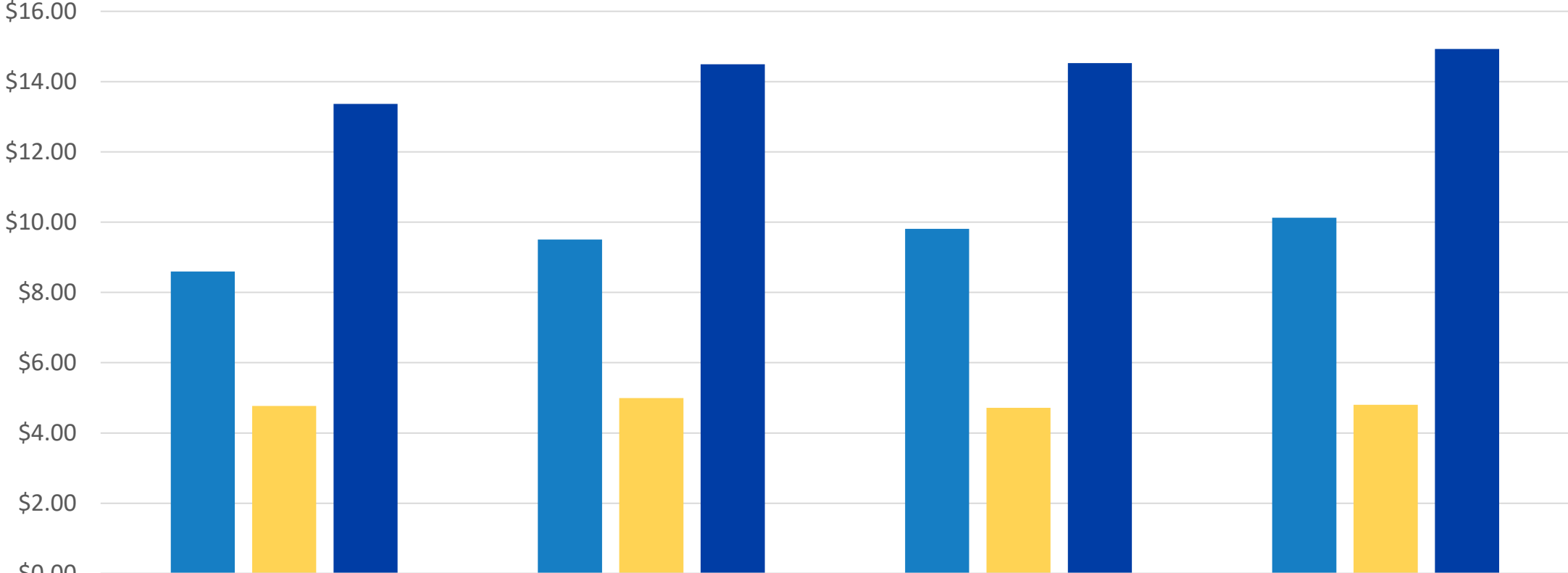
	FY22	FY23	FY24	FY25
Food & Beverage	\$91.9 M	\$109.9 M	\$123.5 M	\$124.1 M
Retail	\$51.0 M	\$57.7 M	\$59.4 M	\$58.9 M
Total	\$142.9 M	\$167.6 M	\$182.8 M	\$183.0 M

Concessions Sales by Terminal



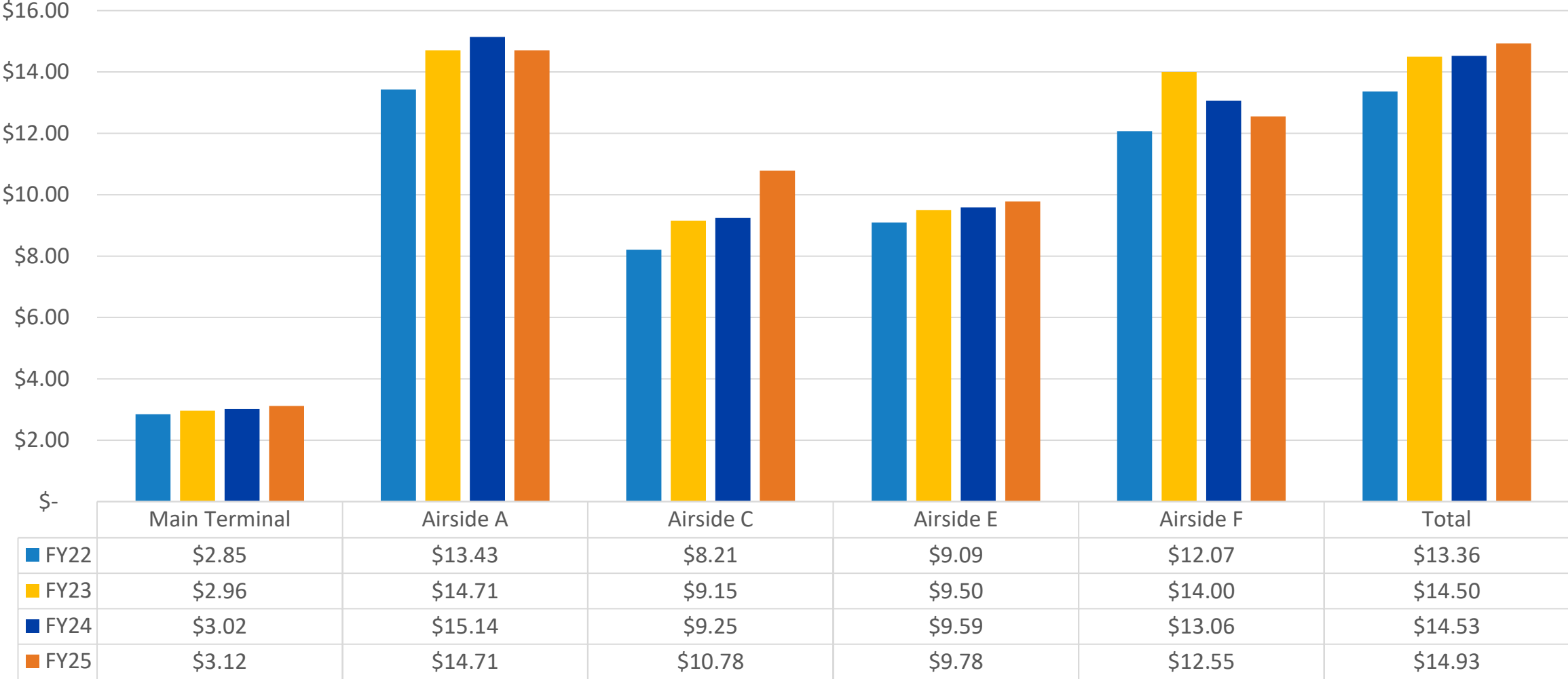
	Main Terminal	Airside A	Airside C	Airside E	Airside F
■ FY22	\$30.4 M	\$36.9 M	\$26.0 M	\$24.8 M	\$24.8 M
■ FY23	\$34.3 M	\$42.2 M	\$31.4 M	\$29.4 M	\$30.4 M
■ FY24	\$38.0 M	\$47.2 M	\$34.7 M	\$32.2 M	\$30.8 M
■ FY25	\$38.2 M	\$44.3 M	\$36.3 M	\$33.8 M	\$30.4 M

Sales per Enplanement by Product

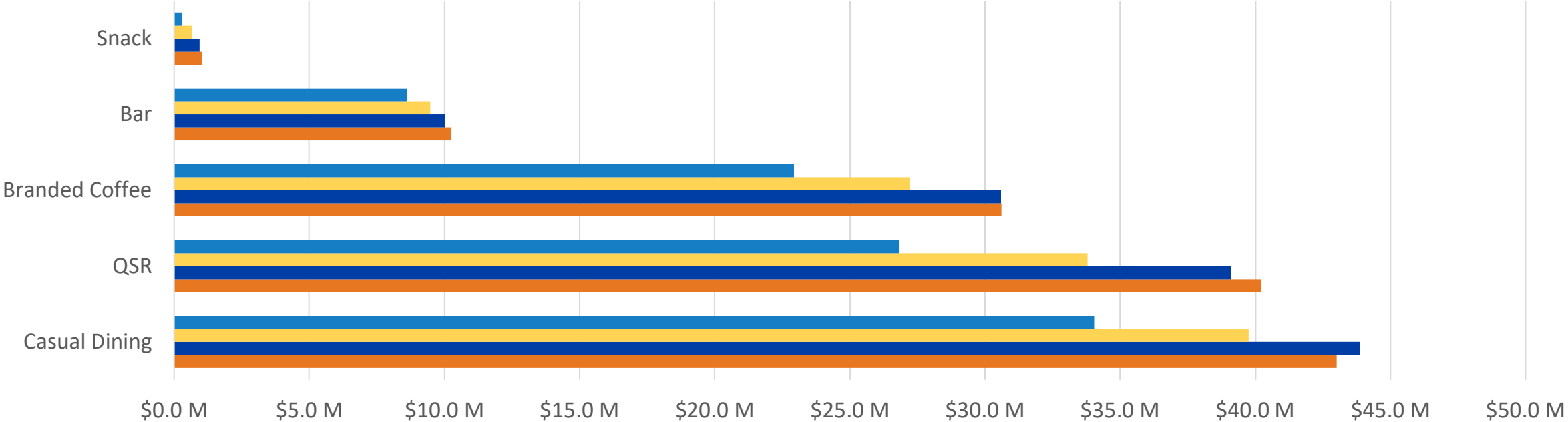


	FY22	FY23	FY24	FY25
Food & Beverage	\$8.60	\$9.50	\$9.81	\$10.12
Retail	\$4.77	\$4.99	\$4.72	\$4.80
Total	\$13.36	\$14.50	\$14.53	\$14.93

Sales per Enplanement by Terminal

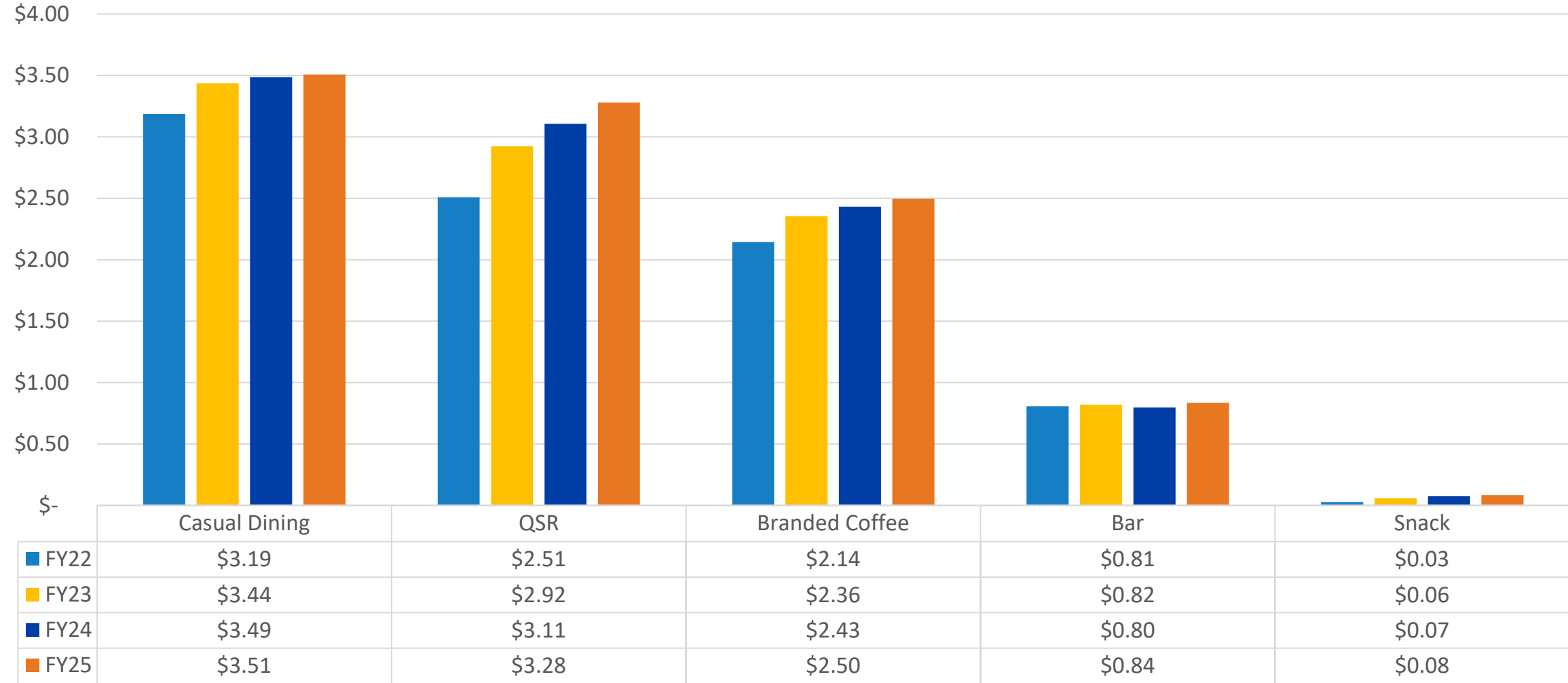


Concessions Sales by Category - F&B

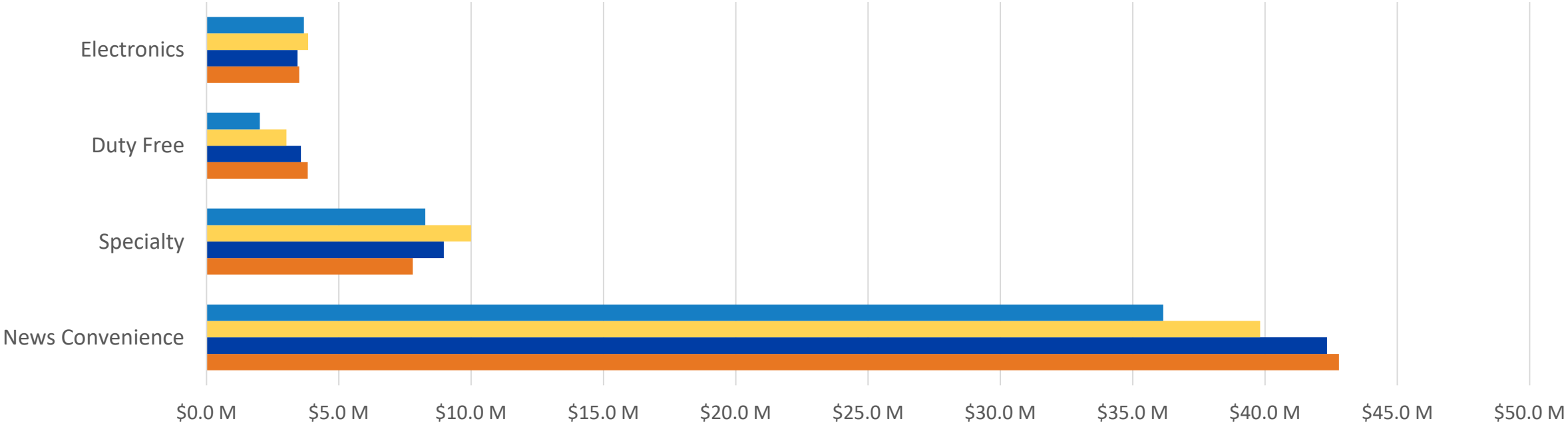


	Casual Dining	QSR	Branded Coffee	Bar	Snack
■ FY22	\$34.0 M	\$26.8 M	\$22.9 M	\$8.6 M	\$0.3 M
■ FY23	\$39.7 M	\$33.8 M	\$27.2 M	\$9.5 M	\$0.7 M
■ FY24	\$43.9 M	\$39.1 M	\$30.6 M	\$10.0 M	\$0.9 M
■ FY25	\$43.0 M	\$40.2 M	\$30.6 M	\$10.3 M	\$1.0 M

Sales per Enplanement by Category - F&B

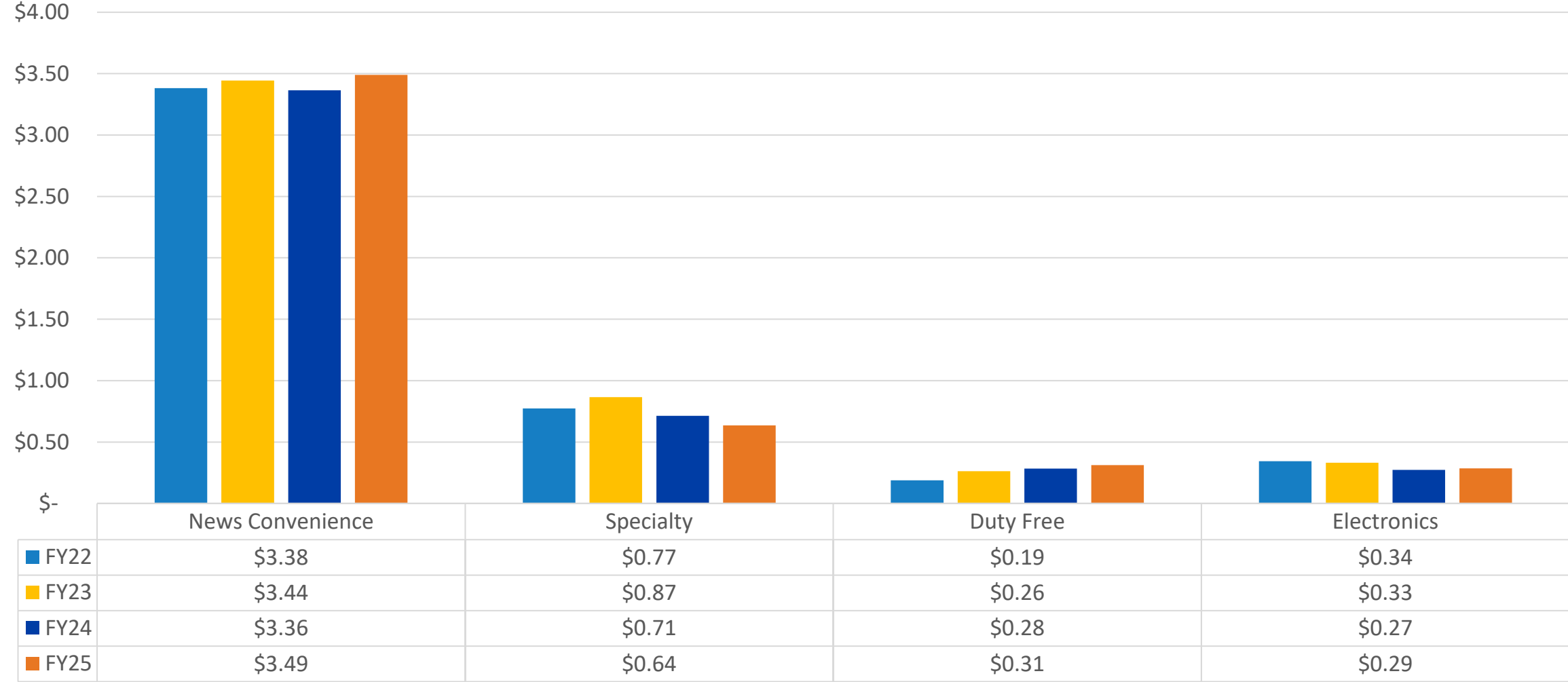


Concessions Sales by Category - Retail



	News Convenience	Specialty	Duty Free	Electronics
■ FY22	\$36.2 M	\$8.3 M	\$2.0 M	\$3.7 M
■ FY23	\$39.8 M	\$10.0 M	\$3.0 M	\$3.8 M
■ FY24	\$42.3 M	\$9.0 M	\$3.6 M	\$3.4 M
■ FY25	\$42.8 M	\$7.8 M	\$3.8 M	\$3.5 M

Sales per Enplanement by Category - Retail



Operating at Airports



Operating at Airports

- Hours of operations (first to last flight)
- Irregular operations
- Flight banking
- Badging and security
- Employee parking
- Higher than typical labor costs
- Merchandise and product delivery and storage
- Rent is the greater of a guaranteed amount or percentage of sales
- Additional direct costs such as CRDC, Concessions Services Fee and Promotional Fund
- Units are offered in packages
- Selected based on competitive proposals with public evaluation

ACDBE Program





What is the ACDBE Program?

An initiative of the U.S. Department of Transportation designed to promote **equal opportunity** in the aviation industry by requiring airports receiving federal funding to set goals for participation by **small, disadvantaged businesses** and to ensure these firms have a **level playing field** to compete for opportunities like restaurants, retail stores, and other airport services.

ACDBE Program Goals and Administration

- **Participation:** Small business owned by socially and economically disadvantaged individuals participate as owner-operators leasing directly from the airport, under subleases with a larger concessionaire, or in joint venture partnerships with other firms.
- **Certification:** Firms must meet specific eligibility standards, including ownership and control criteria.
- **Compliance:** Federal regulations and guidelines impose monitoring, reporting, and record-keeping obligations.



Recent ACDBE Program Changes



- USDOT recently published comprehensive changes to the certification process in an Interim Final Rule on October 3, 2025.
- Key Changes:
 - **Elimination of Race/Sex Presumptions:** Removes the assumption that minority and women-owned businesses are socially and economically disadvantaged.
 - **Individualized Determination:** All applicants, whether new or existing, must now provide evidence of social and economic disadvantage on a case-by-case basis.
 - **Re-Evaluation:** All currently certified ACDBE firms must undergo a re-evaluation process and submit new documentation to maintain certification.
 - **Re-evaluation Period:** Airports cannot enforce existing or set new ACDBE goals during the re-evaluation period.

Resources

- USDOT DBE & ACDBE Program Interim Final Rule: [transportation.gov/sites/dot.gov/files/2025-09/DBE%20IFR.Signed.9-30-2025.pdf](https://www.transportation.gov/sites/dot.gov/files/2025-09/DBE%20IFR.Signed.9-30-2025.pdf)
- USDOT FAQs: [Official Frequently Asked Questions on the DBE Program](#)
- USDOT DBE webpage: [Disadvantaged Business Enterprise \(DBE\) Program | US Department of Transportation](#)
- Airport Minority Advisory Council: [AMAC-org.com](https://www.amac-org.com)

Navigating the Procurement Process

Purpose and Objectives

- Purpose
 - Procurement Department overview
 - How we buy or contract for goods/services
- Objectives
 - Where you can find information on upcoming projects or procurements



What We Do

- Responsible for acquisition of all goods and services
- Support the operations of:
 - Tampa International Airport
 - Peter O. Knight Airport
 - Plant City Airport
 - Tampa Executive Airport
- Operate in accordance with:
 - Authority procurement policies and procedures
 - Enabling Act
 - Florida Sunshine Law
 - Cone of Silence



Ensures:

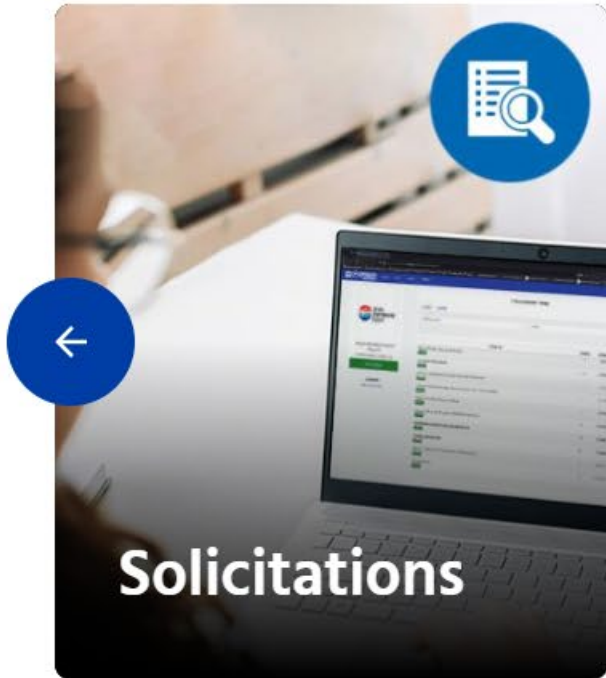
- Fairness
- Competition
- Best Value

Procurement Webpage

TampaAirport.com/business/business-opportunities



Procurement Internet Webpage



eProcurement Platform



Procurement Portal

Projects | Calendar

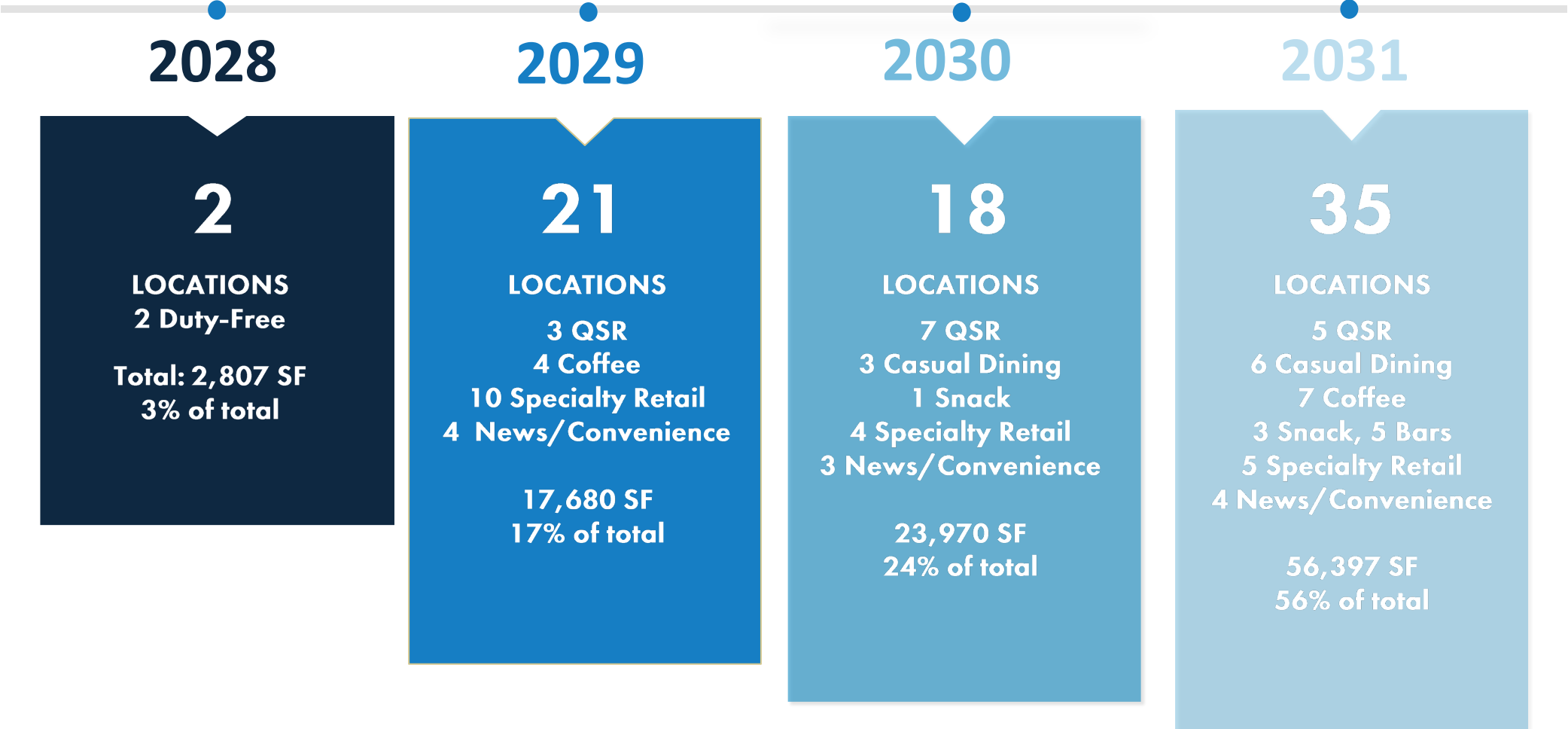
All Departments | Active | Advanced Search

Project Title	Addenda	Release Date	Due Date
2024 TBAC NIGP Reverse Trade Show OPEN	0	4/9/2024	5/31/2024
Property Management Services OPEN	2	5/14/2024	6/10/2024
Proximity Cards OPEN	3	5/15/2024	6/19/2024
Continuing Environmental Engineering Consulting Services OPEN	1	5/2/2024	6/20/2024

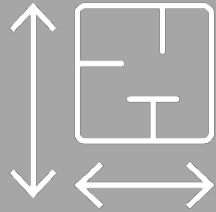
- No charge for suppliers to register
- Receive email notifications of new opportunities
- Submit questions and receive answers for open solicitations
- Submit responses to bid opportunities

Concessions Redevelopment Program

Concessions Program Expirations



Airside D Concessions Program



~20,000 sf – 25,000 sf
of Concessions space



Common use lounge
~5,000 sf – 7,500 sf

Food & Beverage

- Quick serve
- Full-service sit-down restaurant
- Gourmet Market
- Coffee



Retail

- Specialty
- Duty-Free
- News/Convenience



Concessions Program Redevelopment Timeline



Learn about TPA Concessions



Concessions 101

Doing Business at the Airport

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