

Concessions Redevelopment Information Session

Waypointe **TPA**
DINE · SHOP · EXPLORE





Agenda

- Introduction
- Tampa Airport Review
- Passengers
- Tampa Bay Area
- Concessions Redevelopment Program Overview
- ACDBE Update / Small Business Enterprise Concessions (SBEC)
- Procurement
- Next Steps
- Networking

Airport Overview



TAMPA INTERNATIONAL AIRPORT



Annual Passengers

24.8M

Daily Average 67,976



Highest Traffic Month

March

2,462,255 passengers



Lowest Traffic Month

September

1,712,373 passengers

4 Airsides / 58 Gates



66

Shops and Restaurants

23,000

Approx. Parking Spaces



239,856,759

Pounds of Cargo and Mail

Calendar Year 2025



3 General

Aviation Airports

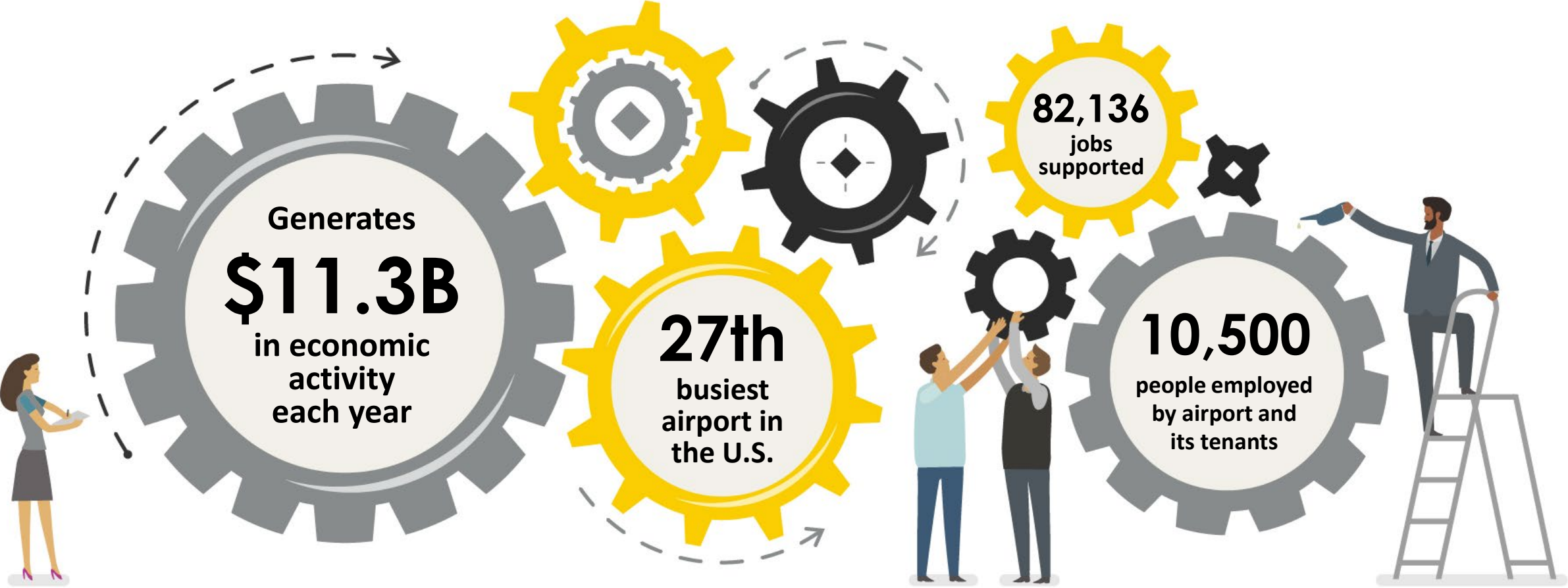
Peter O. Knight, Plant City,

Tampa Executive



Calendar Year 2025

TPA's Economic Impact



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

Airside D

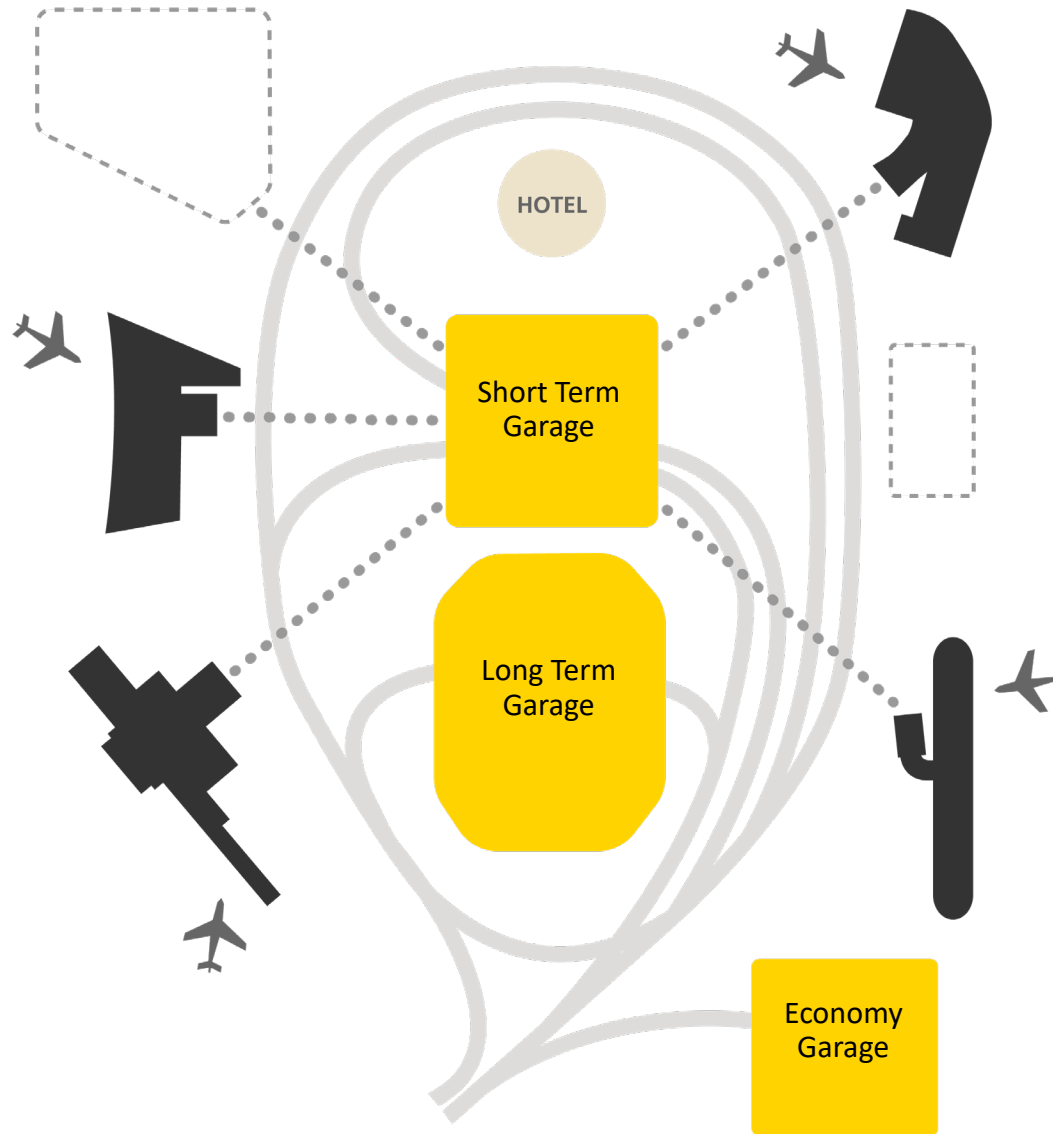
Opened in 1971
Demolished 2008
Planned 16-gate Airside D
scheduled to open in 2029

Airside E

13 Gates
Opened in 1971
Rebuilt 2002
3.5m EPAX

Airside F

14 Gates
Opened in 1987
2.5m EPAX



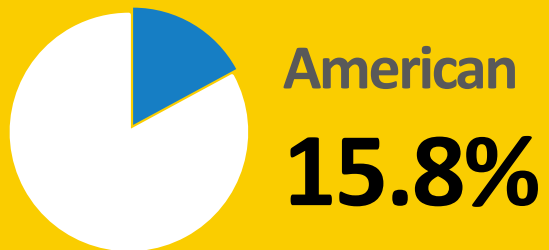
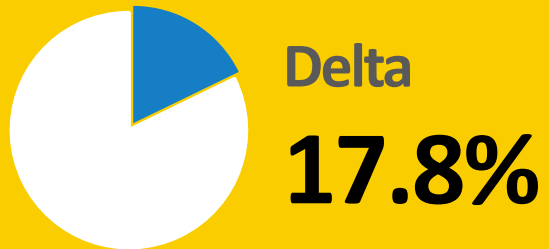
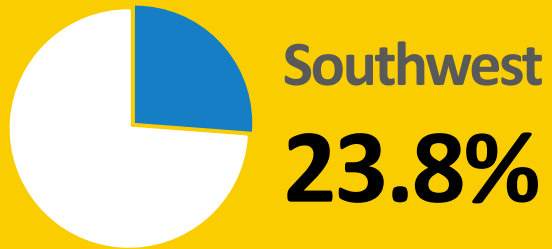
Airside C

16 Gates
Opened in 1971
Rebuilt 2005
3.4m EPAX

Airside A

16 Gates
Opened in 1995
3.0m EPAX

Top 3 Largest Airline Market Share by percentage



620

Estimated Daily Flight Operations



Top 10 Markets for Tampa

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

Calendar Year 2025

TPA's Domestic Catchment Area

3.3 million

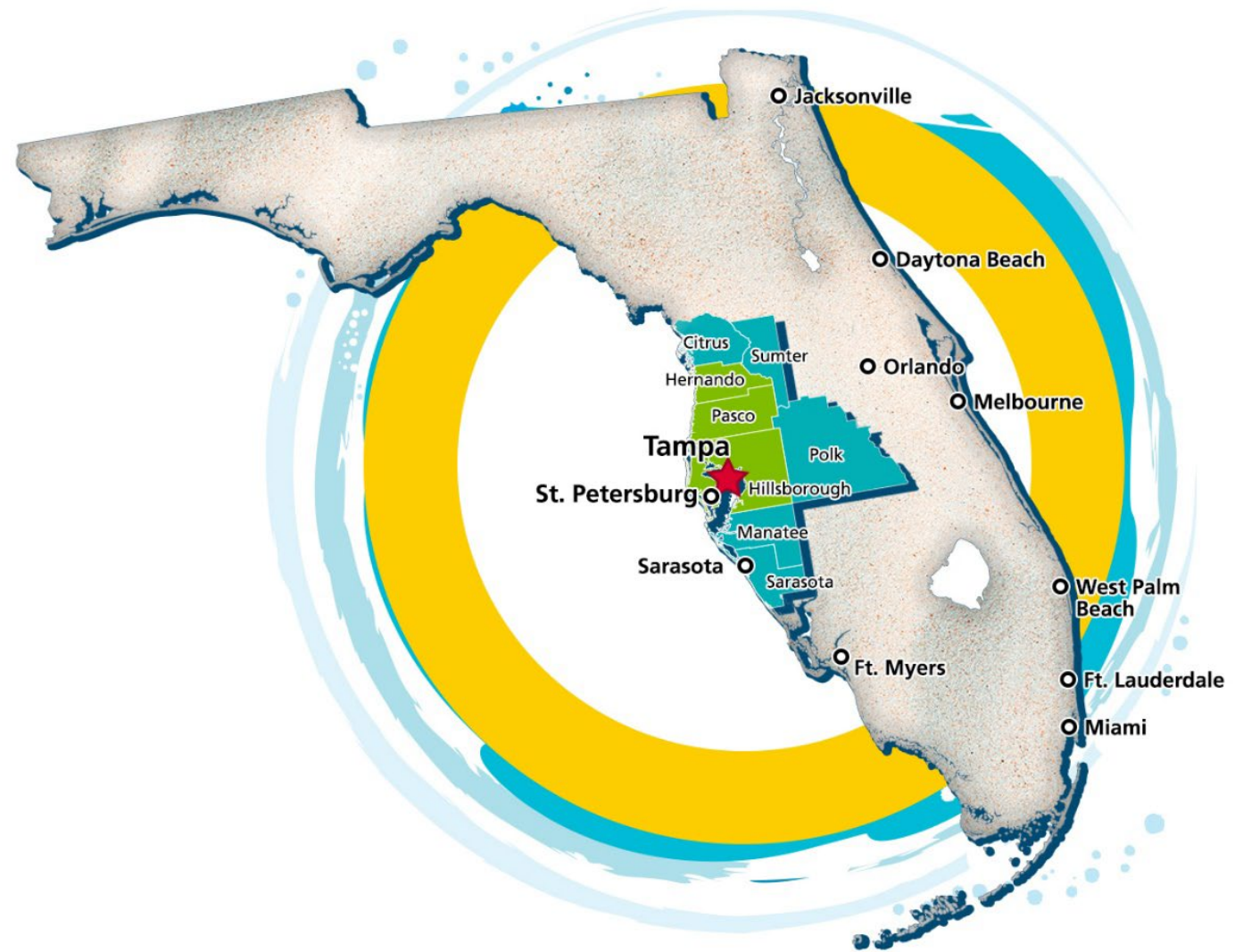
in 4-county primary catchment area of Tampa Bay Metropolitan Statistical Area: *Hillsborough, Pinellas, Hernando & Pasco*

3.6 million by 2030

5.3 million

in 9-county area comprising primary and secondary catchments: *Primary counties plus Citrus, Manatee, Sarasota, Polk and Sumter*

5.8 million by 2030



Source: ESRI Business Analyst

TPA's International Catchment Area

4.2 million

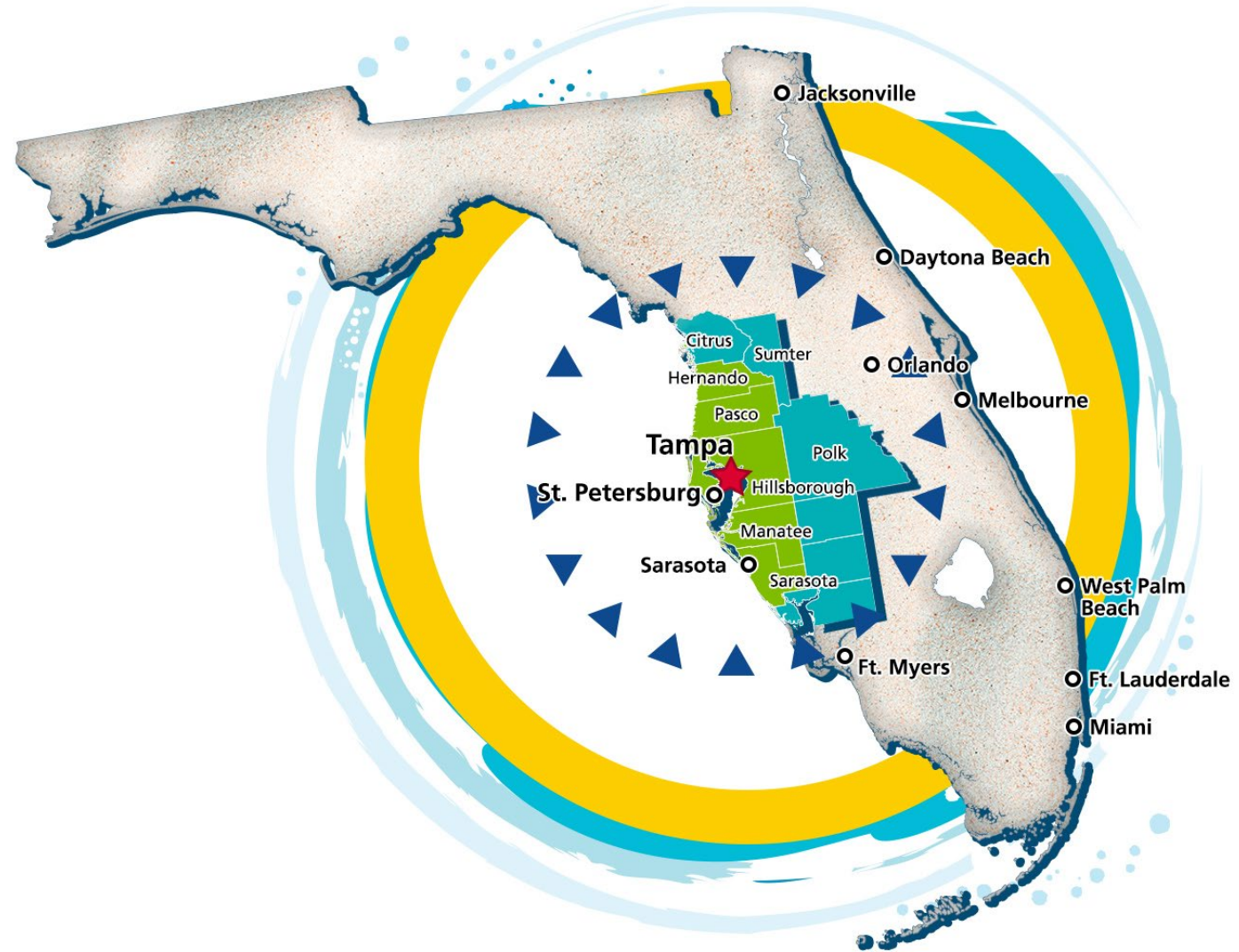
in 6-county primary catchment area of Tampa Bay Metropolitan Statistical Area: *Hernando, Hillsborough, Manatee, Pasco, Pinellas & Sarasota*

4.6 million by 2030

5.5 million

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

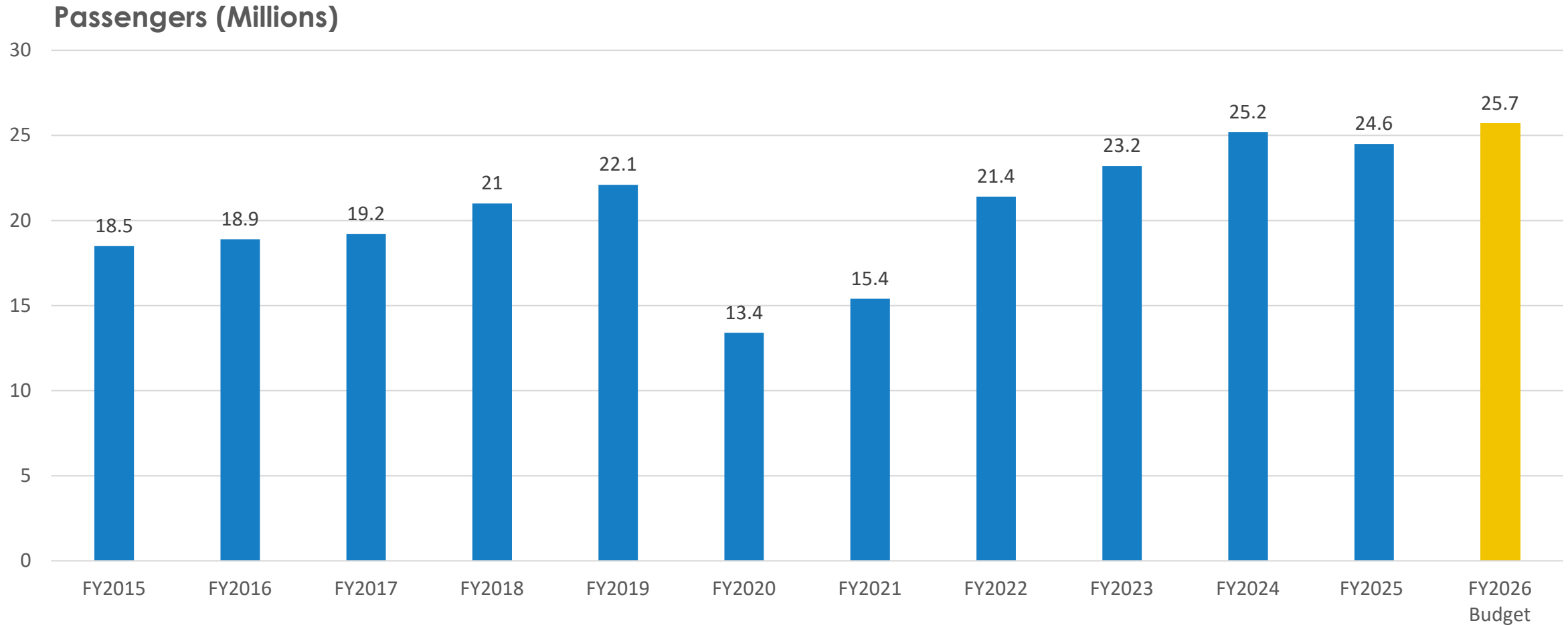
6.1 million by 2030



Source: ESRI Business Analyst – 2023 Total Population

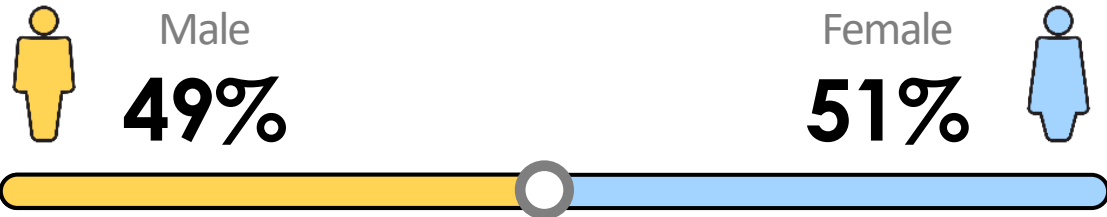
Passenger Traffic

Tampa International Airport is projected to handle 25,673,763 passengers in FY2026.

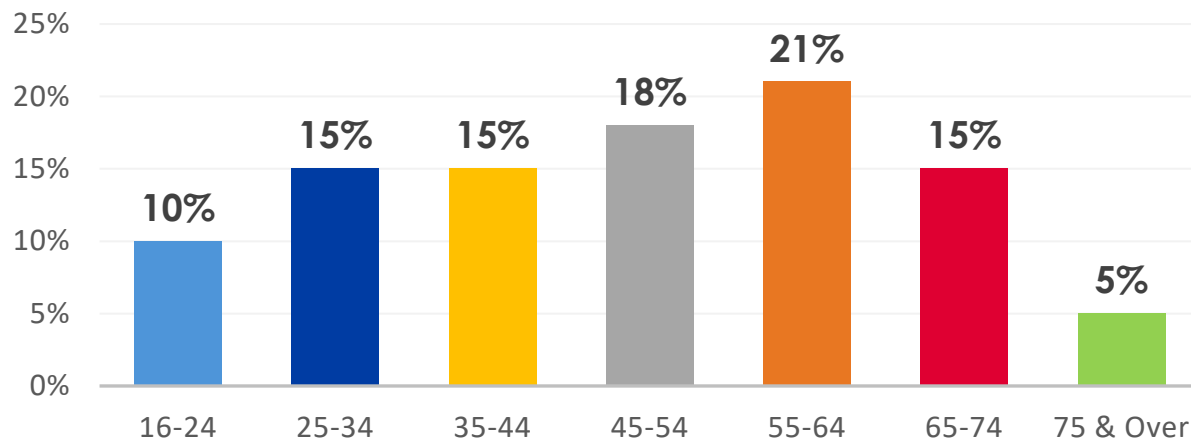


Passenger Demographics

Calendar Year 2025



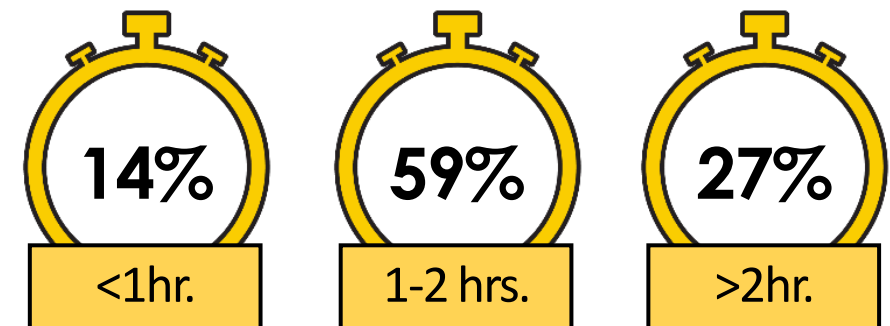
Age Group Distribution



Visitor vs. Local Traffic



Dwell Time at TPA

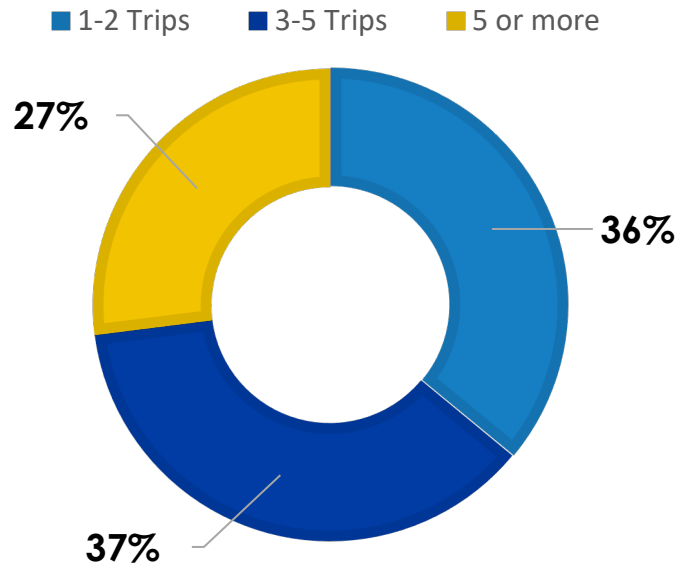


Calendar Year 2025

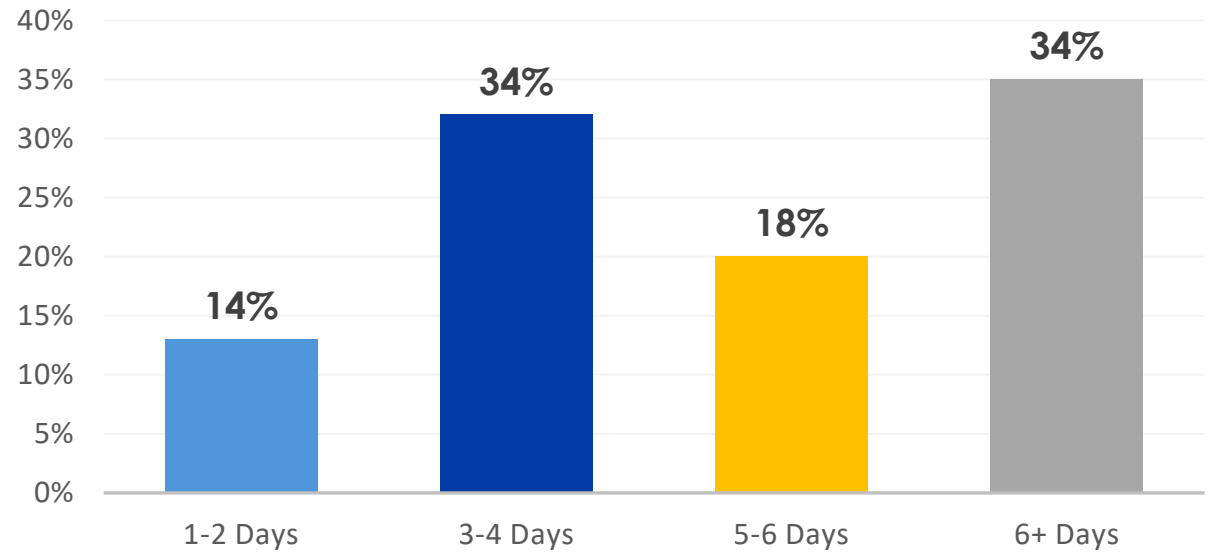
Passenger Demographics

Calendar Year 2025

Trips Per Year



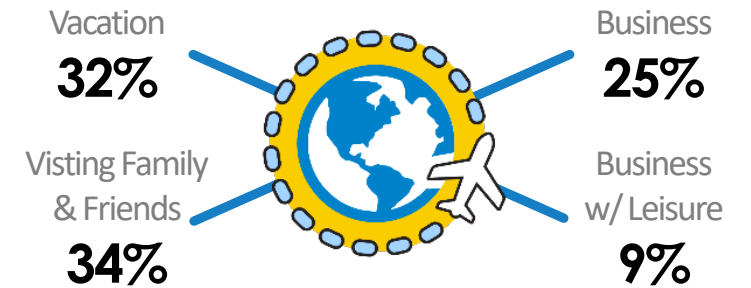
Length of Stay



Travel Party Size



Travel Purpose

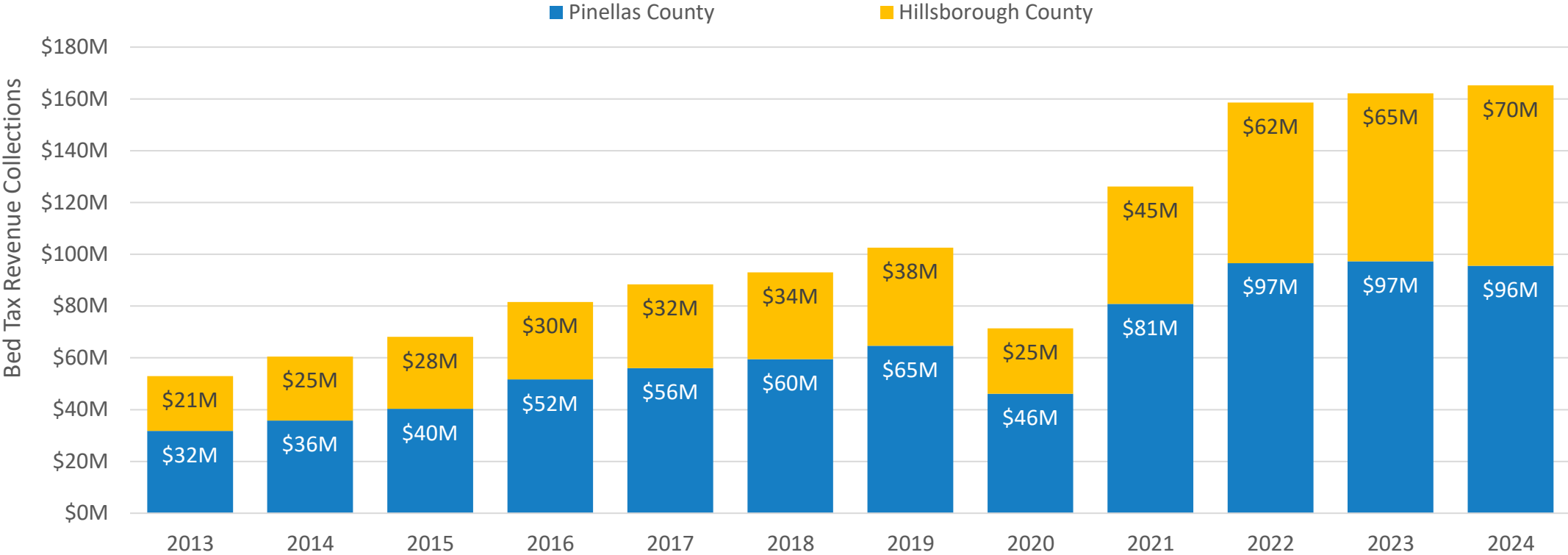


Tampa Bay Area



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

Current Concessions Program

WaypointeTPA

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66

Concessions Locations
34 Food & Beverage
32 Retail



~107,000 sf
of Concessions space

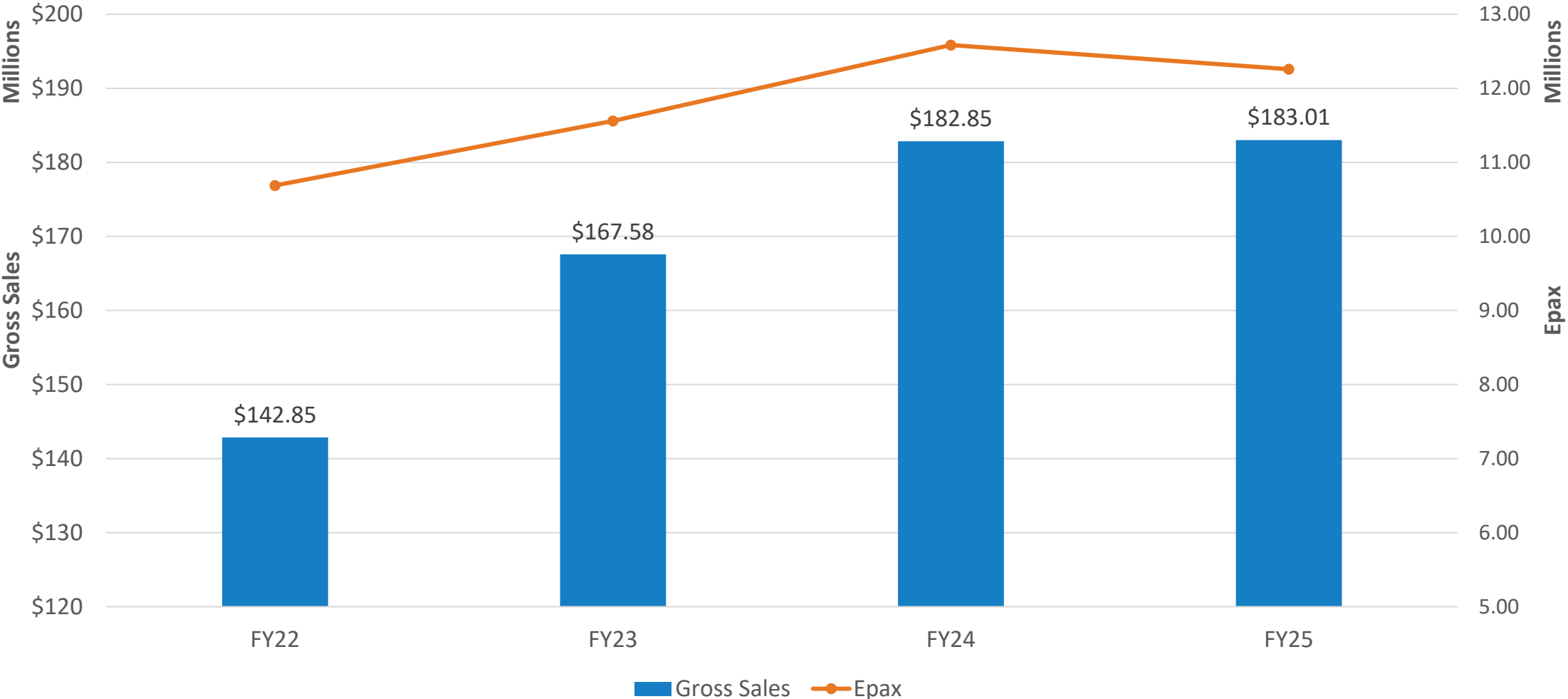


\$183M
FY25 gross receipts

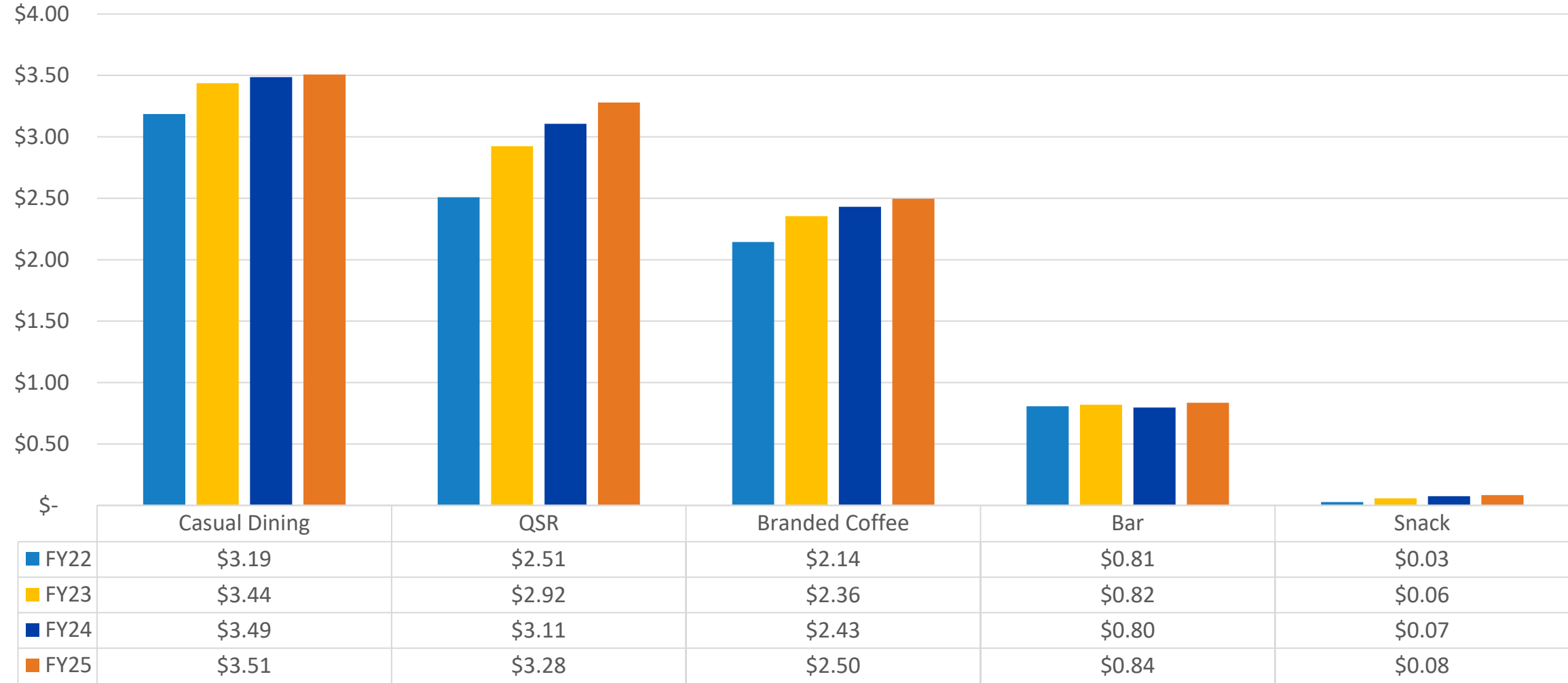


**Award
Winning**

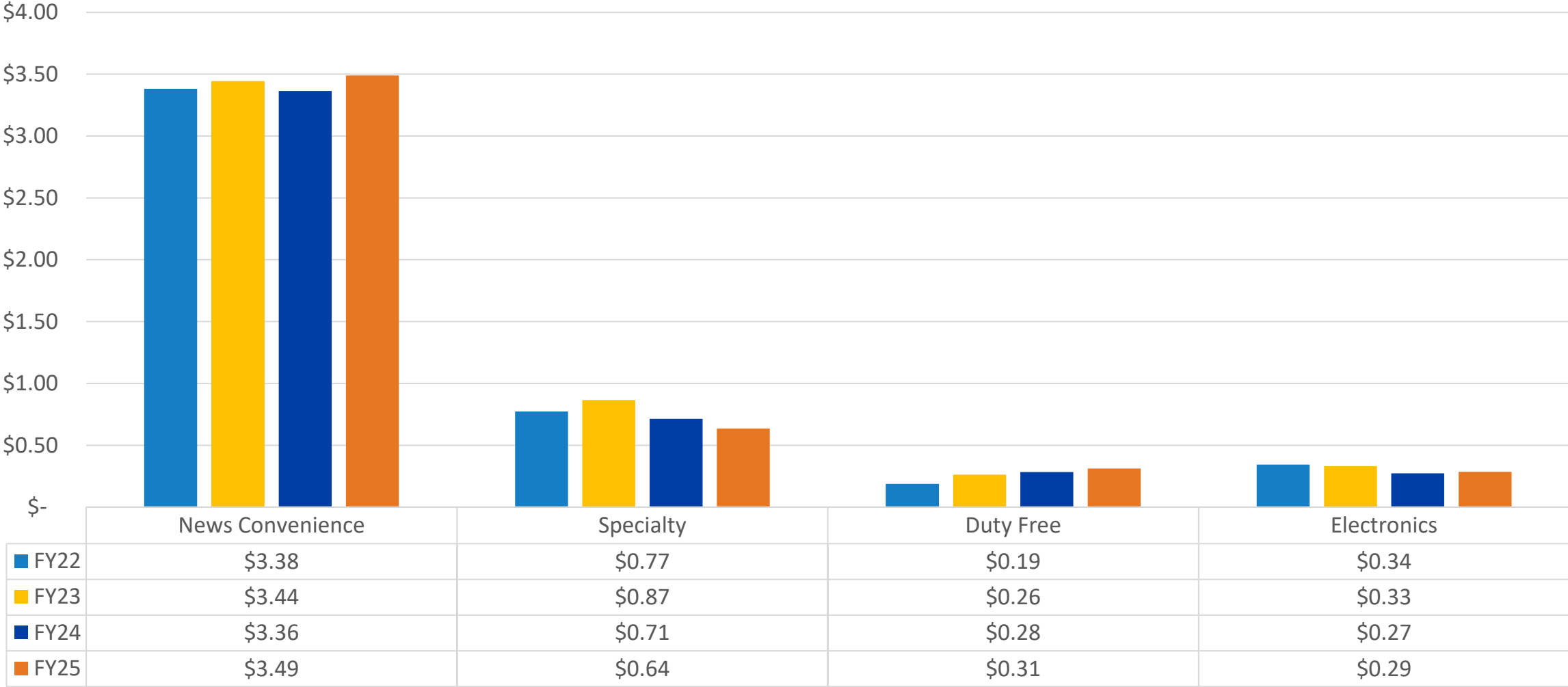
Concessions Sales History



Sales per Enplanement by Category - F&B



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

Concessions Redevelopment Program

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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 2024-2029

Underway

16-gate Airside D

Passenger Spend Motivation

INDUSTRY TRENDS



- Food & Beverage
- Convenience
- Grab N Go



- Specialty Retail

FORECAST ENPLANEMENTS



Airside

C



Airsides

A

E



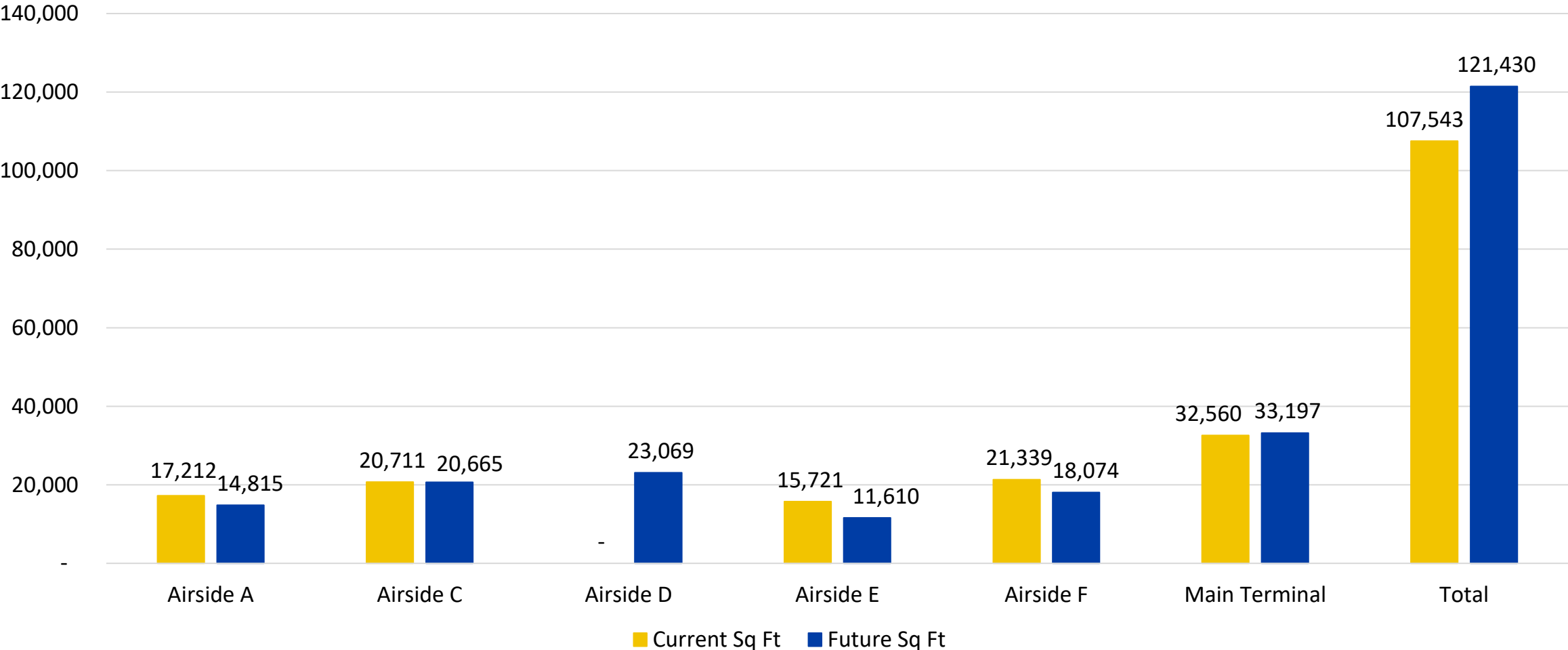
No Change

Airside

F

Source: Paslay Group, November 2025

Concessions Program Sizing



Source: HCAA, Paslay Group, March 2026

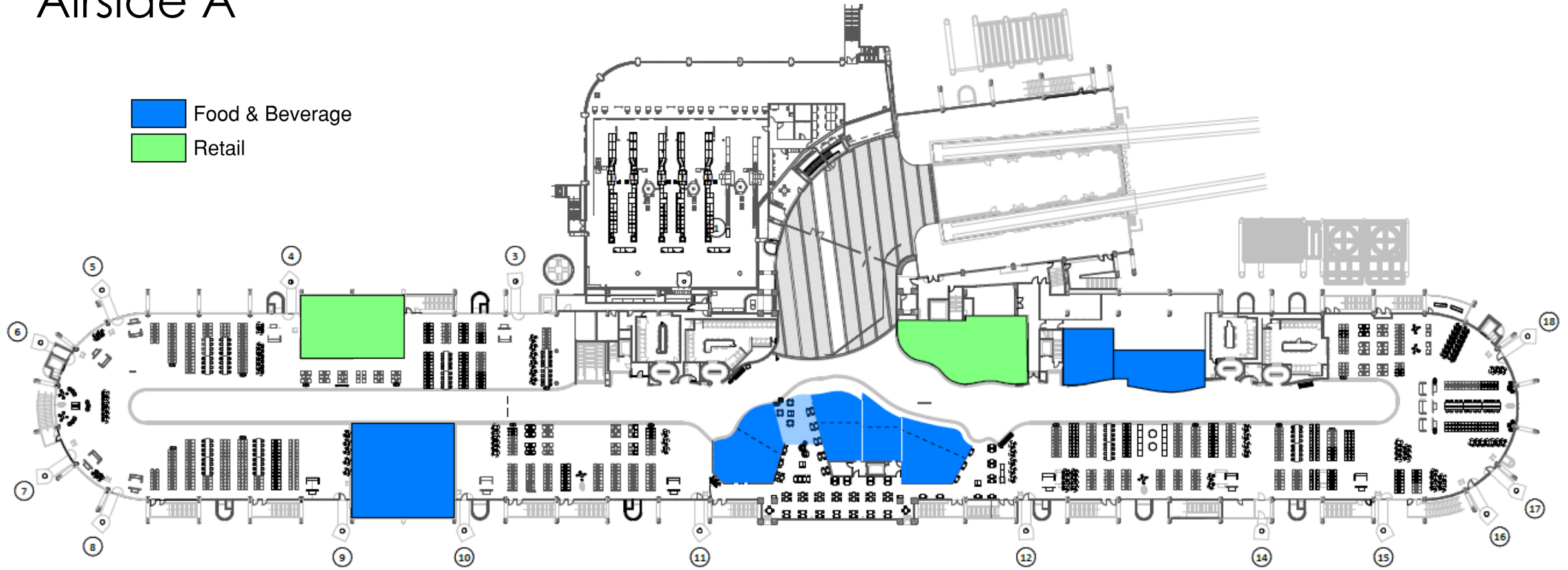
Concessions Redevelopment Program

- Multi-year, multi-phased approach to redevelop all Concessions offerings from 2026 thru 2032
- Types of locations include, but not limited to:
 - Restaurants
 - Common use lounges
 - Coffee shops
 - Gourmet markets
 - Hybrid Retail
 - Newsstands
 - Duty free
- A single contract will contain multiple locations throughout the airport



Concessions Preliminary Space Planning

Airside A

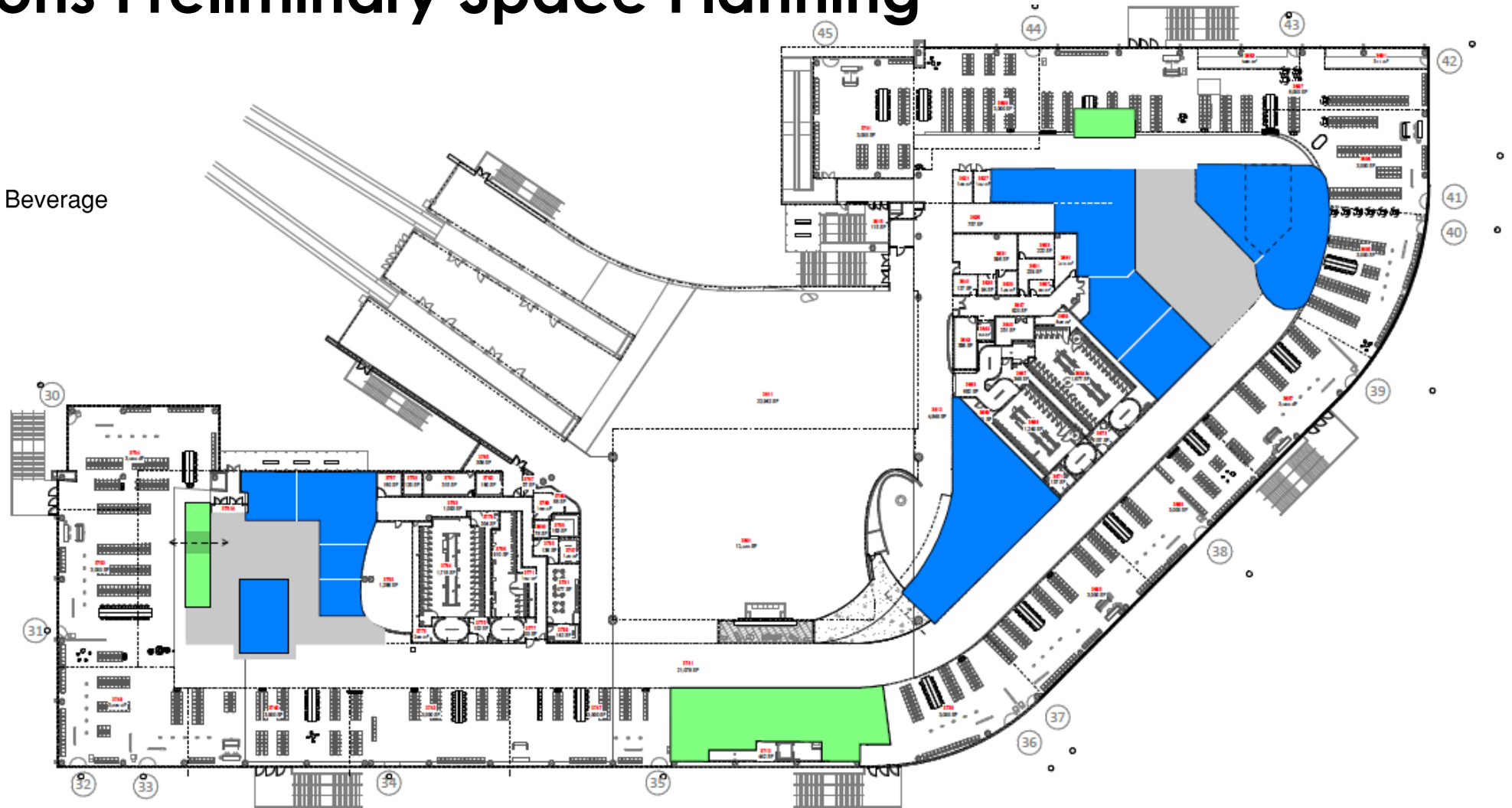


Source: Paslay Group, March 2026

Concessions Preliminary Space Planning

Airside C


- Food & Beverage
- Retail



Source: Paslay Group, March 2026

Concessions Preliminary Space Planning

Airside D

-  Food & Beverage
-  Retail

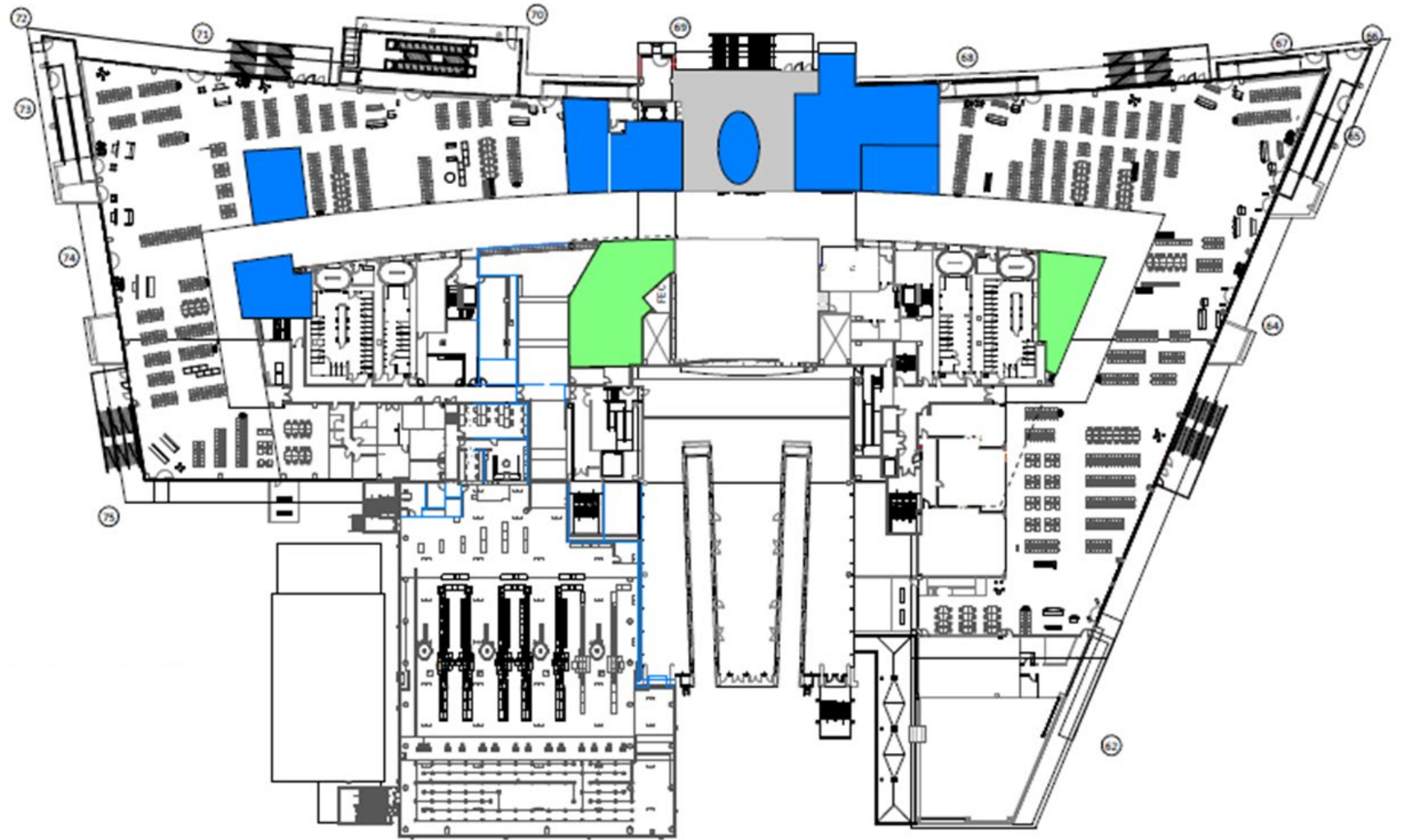


Source: Paslay Group, March 2026

Concessions Preliminary Space Planning

Airside E

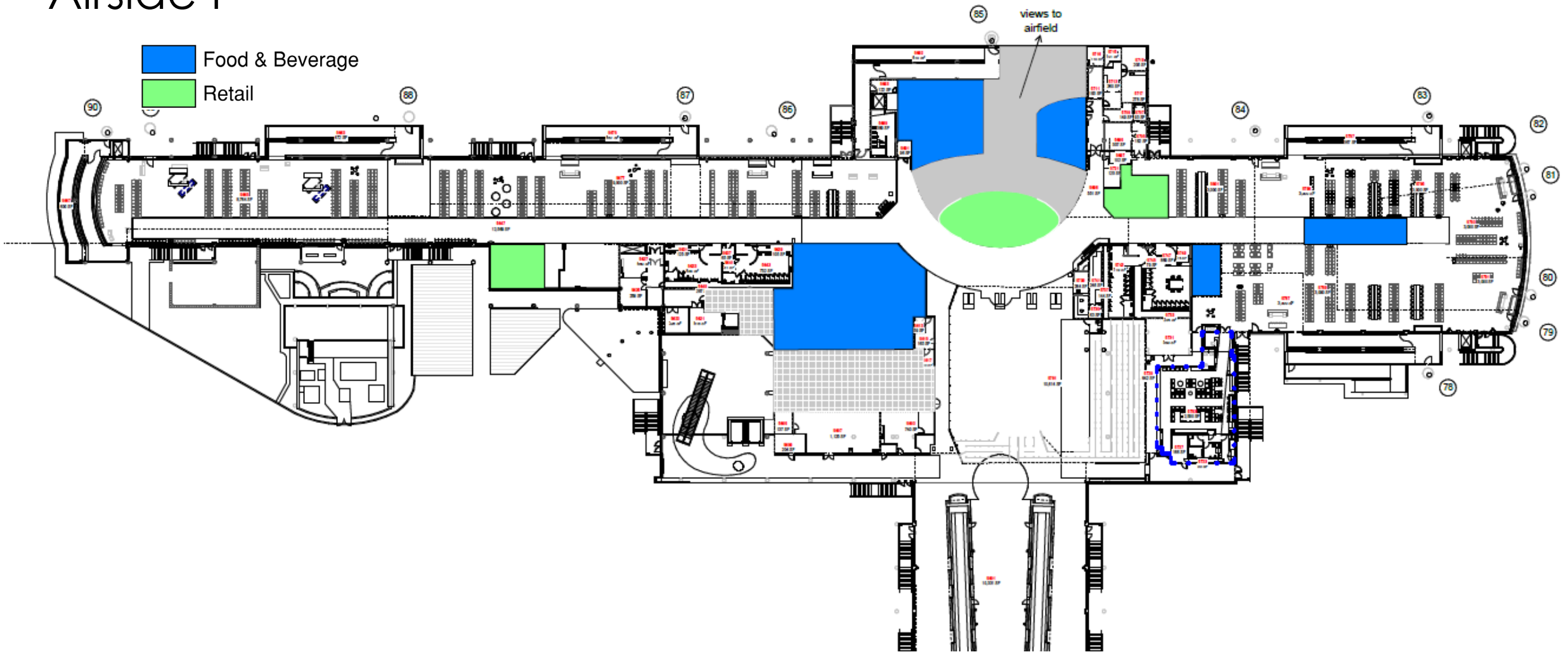
-  Food & Beverage
-  Retail



Source: Paslay Group, March 2026

Concessions Preliminary Space Planning



Airside F

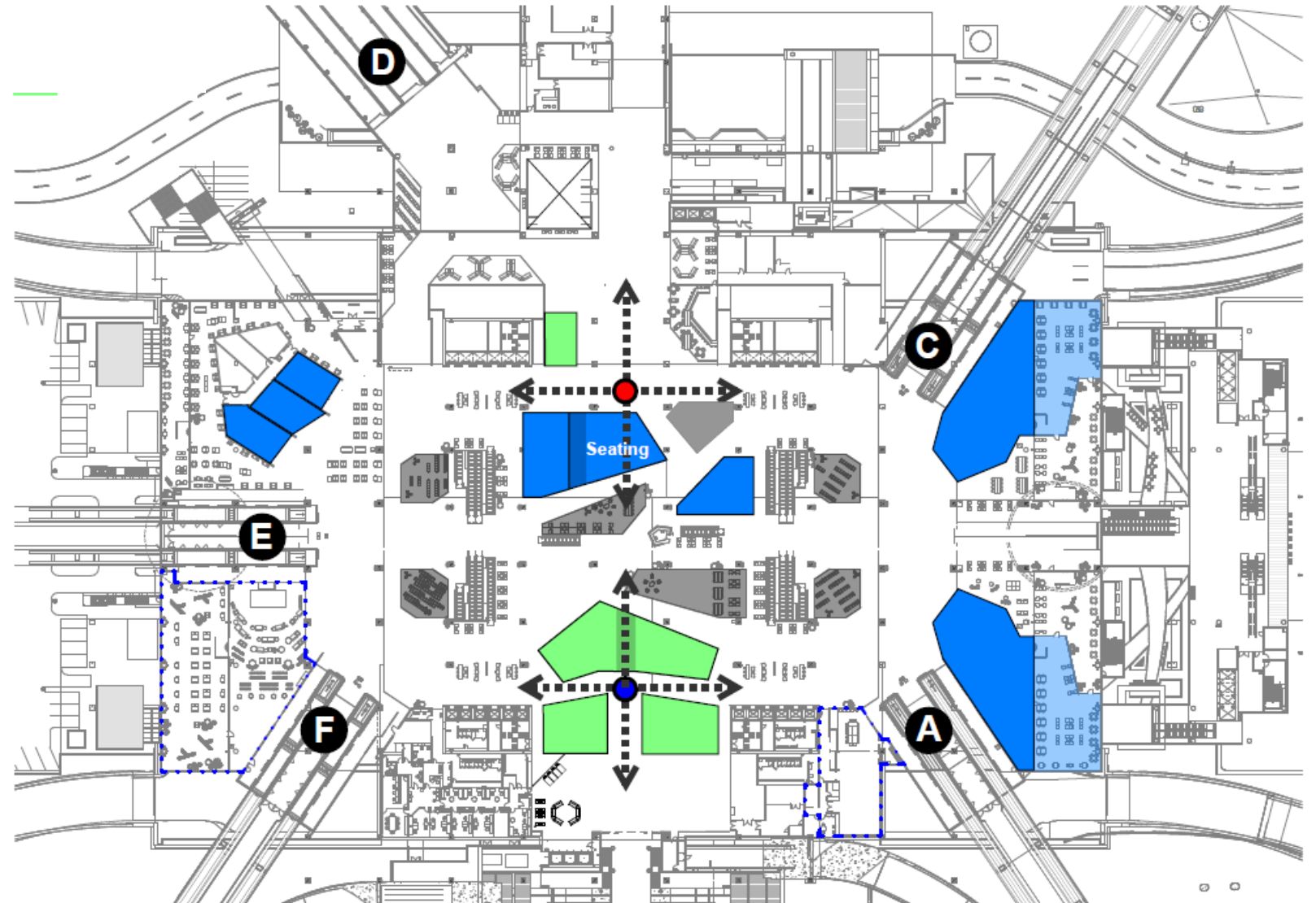


Source: Paslay Group, March 2026

Concessions Preliminary Space Planning

Main Terminal

-  Food & Beverage
-  Retail



Source: Paslay Group, March 2026

ACDBE Update / Small Business Enterprise Concessions (SBEC)



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 Update

- Due to comprehensive changes to the ACDBE certification process issued October 2025:
 - All ACDBE firms must be re-evaluated under new certification standards to continue to be certified
 - HCAA will begin re-evaluations on May 1
 - ACDBE firms *currently certified by HCAA* have been notified of the re-evaluation process and invited to a virtual info session on April 21
 - A Personal Narrative Statement and updated Personal Net Worth Statement are required
- ACDBE regulations provide for a small business element within the ACDBE Program
- Airport currently is developing a Small Business Enterprise Concession (SBEC) Program

Small Business Enterprise Concessions

When the previous concessions redevelopment was completed in 2019, we expanded opportunities to 13 ACDBE operators through joint venture and sub-tenant arrangements with prime concessionaires.

Our goal is to continue to include opportunities for small businesses to participate in the upcoming redevelopment program.



Procurement



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:

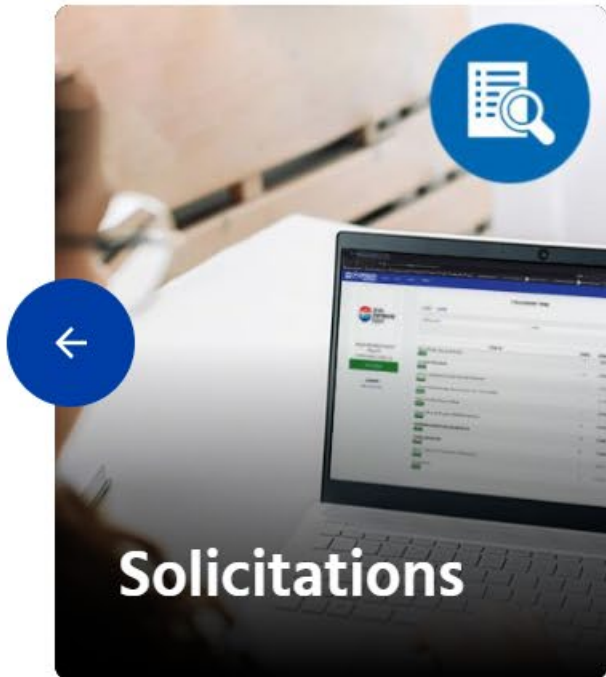
- Fairness
- Competition
- Best Value

Procurement Webpage

TampaAirport.com/business/business-opportunities



Procurement Internet Webpage



eProcurement Platform



Procurement Portal

Projects | Calendar

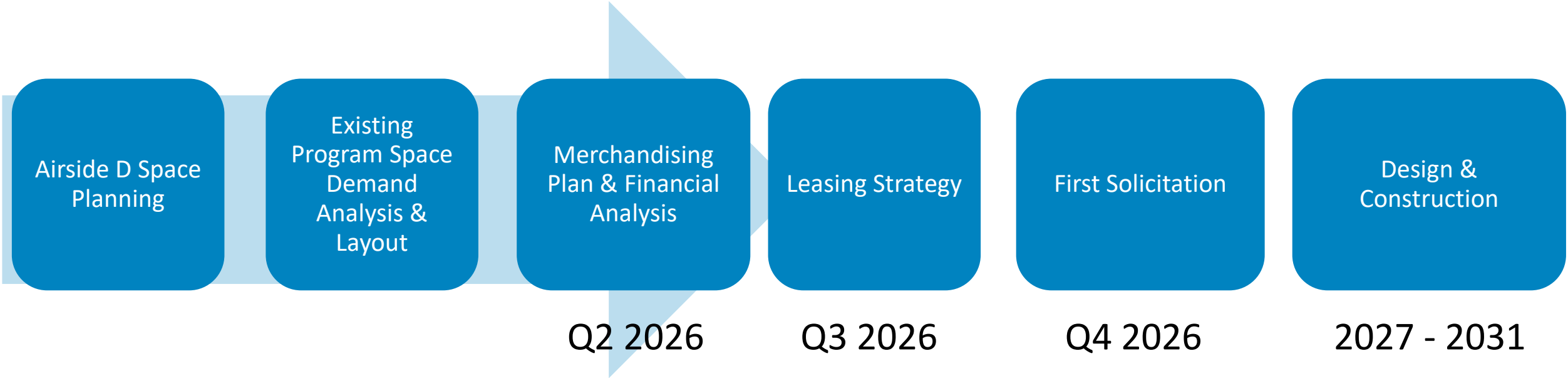
All Departments | Active | Advanced Search

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

Next Steps

Concessions Program Redevelopment Timeline



Learn about TPA Concessions



Networking

