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Terminals A and B Concession Master Plan



AirProjects, Inc.



Ann Ferraguto, Principal

- Over 30 years of experience providing retail and food service consulting services and financial analyses for concessions and commercial properties at airports.
- Planned numerous successful and award-winning airport concession programs, including most of the Top 50 Airports in North America, such as:
 - J.F. K. International, New York
 - Hartsfield-Jackson Atlanta International
 - Salt Lake City International
 - Seattle-Tacoma International
 - Washington Dulles International
 - Detroit Metropolitan
 - Charleston International
 - Reagan Washington National
 - San Francisco International
 - Vancouver International
- International experience in South America, the Caribbean, Africa, Canada, and Australia
- Co-Author of “Handbook on Improving Terminal Design to Increase Revenue Generation and Customer Satisfaction” published by the National Academies of Sciences



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Airside 4 – BEFORE



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Airside 4 – AFTER



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Landside A, West Quadrant - BEFORE



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Landside A, West Quadrant - AFTER

Overview

Concession Master Plan Goals

Market Research

Supportable Concession Space

Concession Concept Plans

- Airside 1
- Airside 2
- Airside 3
- Airside 4
- Landside

Leasing Strategies (including ACDBEs)

Schedule and Next Steps



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Concession Master Plan Goals



Concession Master Plan Goals



Modernize and right-size the concession programs in Terminals A and B to enhance parity with Terminal C



Update the concession concepts and designs to **meet the wants and needs of your airport customers**



Maximize the commercial real estate, but minimize the need to redemise and/or create new space



Capitalize on existing infrastructure



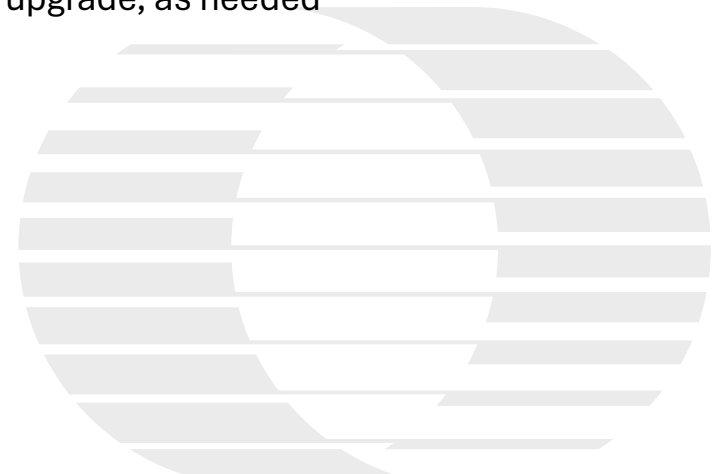
LANDSIDE: Assemble smaller units to create opportunities for **larger, more impactful concepts with targeted adjacencies**



AIRSIDE: Re-concept spaces to **increase output to meet passenger needs** and identify opportunities to expand and upgrade, as needed



Continue to **provide impactful opportunities for small businesses**



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Market Research



Market Research: Airport Survey Results

- **Good retail offering and layout**, particularly in the landside terminal
- Some retail locations, particularly on the Airsides, are **undersized for passenger volume**
- Retail concepts **require modernization**

Concession Master Plan Goals

Maintain Airport's high standard in retail offerings, while **right-sizing** the program and **refreshing** the overall look

- **Suitable variety** of popular, nationally-branded quick service brands
- Food service concepts **require modernization**
- **Limited healthy options**
- **Heavily used** food courts and **insufficient seating and queuing** spaces

Retain a variety of popular food service concepts, while **elevating the offerings, expanding space where possible,** and updating the overall look of the program

Include local, regional, and national brands to curate a **unique dining experience reflective of the Orlando area**

- **Terminal C consistently receives higher ratings** in entertainment and customer engagement than Terminals A and B

Planned **experience spaces** in the landside terminal will **upgrade the entertainment and customer engagement** opportunities for passengers



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Market Research: Visit Orlando Results

Visit Orlando Results

International passenger recovery to Orlando is ahead of the U.S., but remains at 75 percent of 2019 levels

Vacation/holiday remains the primary reason for taking a trip to Orlando

Top leisure activities for Orlando visitors include shopping, visiting amusement/theme parks, and sightseeing

Overseas visitors spent an average of **\$1,109 per person per trip**, an increase from 2021 (\$995)

Indications

The area's popularity as a destination for travelers remains strong, providing continuing **opportunity for international passenger growth** in the future

Leisure passengers tend to have **longer dwell times, increased interest in shopping, and a willingness to spend money** at the Airport

The concession program should accommodate a **variety of food service and retail concepts** that appeal to all types of visitors

Passengers are willing to spend more to visit the Orlando area

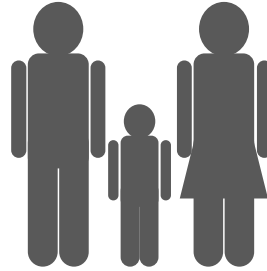
Visit Orlando Results are based on the 2022 State of the Industry Report.



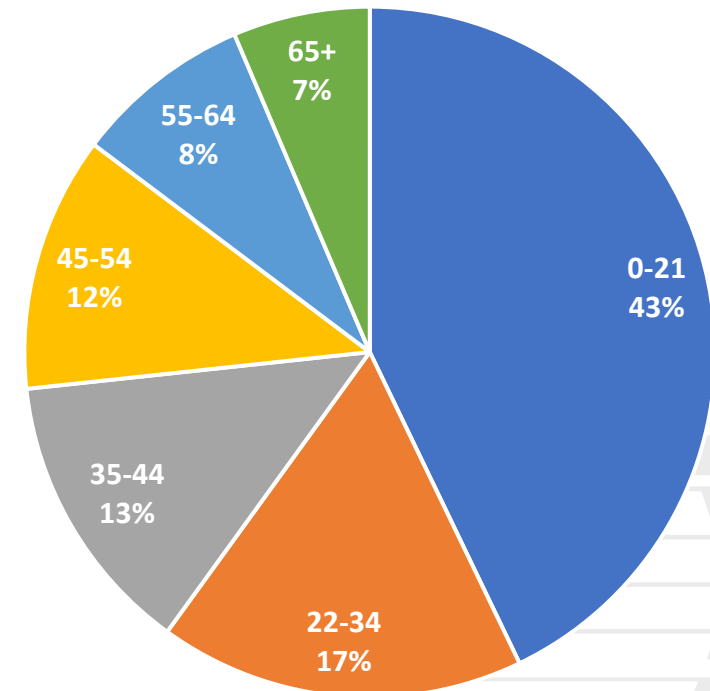
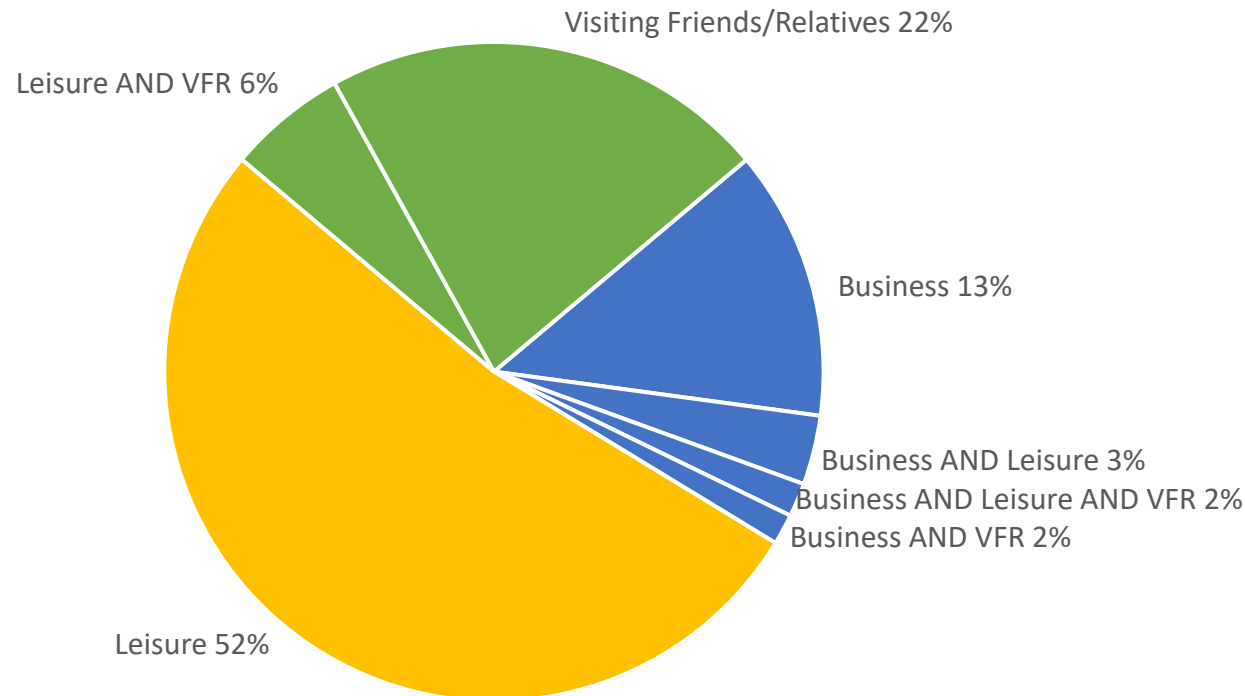
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Passenger Profile – Travel Party & Trip Purpose



Respondents	13,988
Passengers	40,350
Average Party Size	2.9



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Source: 2-Minute Passenger Survey (Online), March 2023 – February 2024, unless otherwise noted.



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Supportable Concession Space



Supportable Concession Space

Based on 22.5 million enplanements

Category	Food Service	Convenience Retail	Specialty Retail	Duty Free Retail	Total
Airside Locations					
Airside 1	16,475	3,716	1,520	3,878	25,589
Airside 2	25,559	2,625	2,006	-	30,190
Airside 3	15,015	3,648	3,091	-	21,754
Airside 4	22,714	2,521	1,800	5,032	32,067
Existing Airside	79,763	12,510	8,417	8,910	109,600
Supportable Space	112,100	16,500	9,700	700	139,000
Variance	(32,300)	(4,100)	(1,300)	8,200	(29,500)
Landside Locations					
Existing Landside	41,689	2,609	34,529	-	78,827
Supportable Space	29,800	2,700	18,600	-	51,100
Variance	11,900	(100)	15,900	-	27,700



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Concession Concept Plans



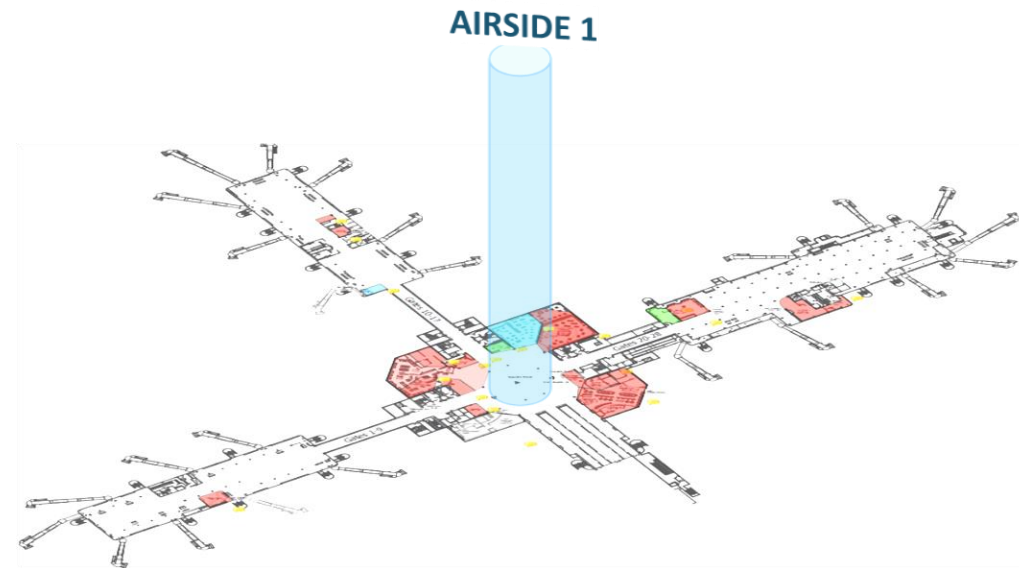


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Airside 1

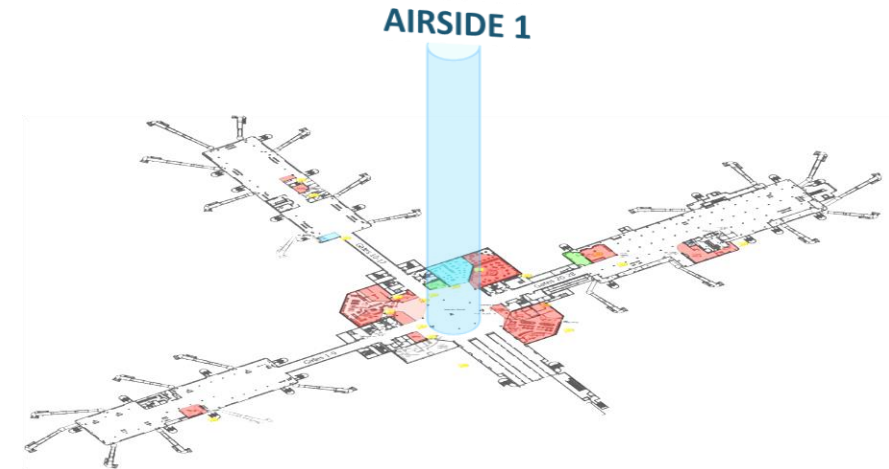
Concession Concept Plan



AS1 Supportable Concession Space Summary

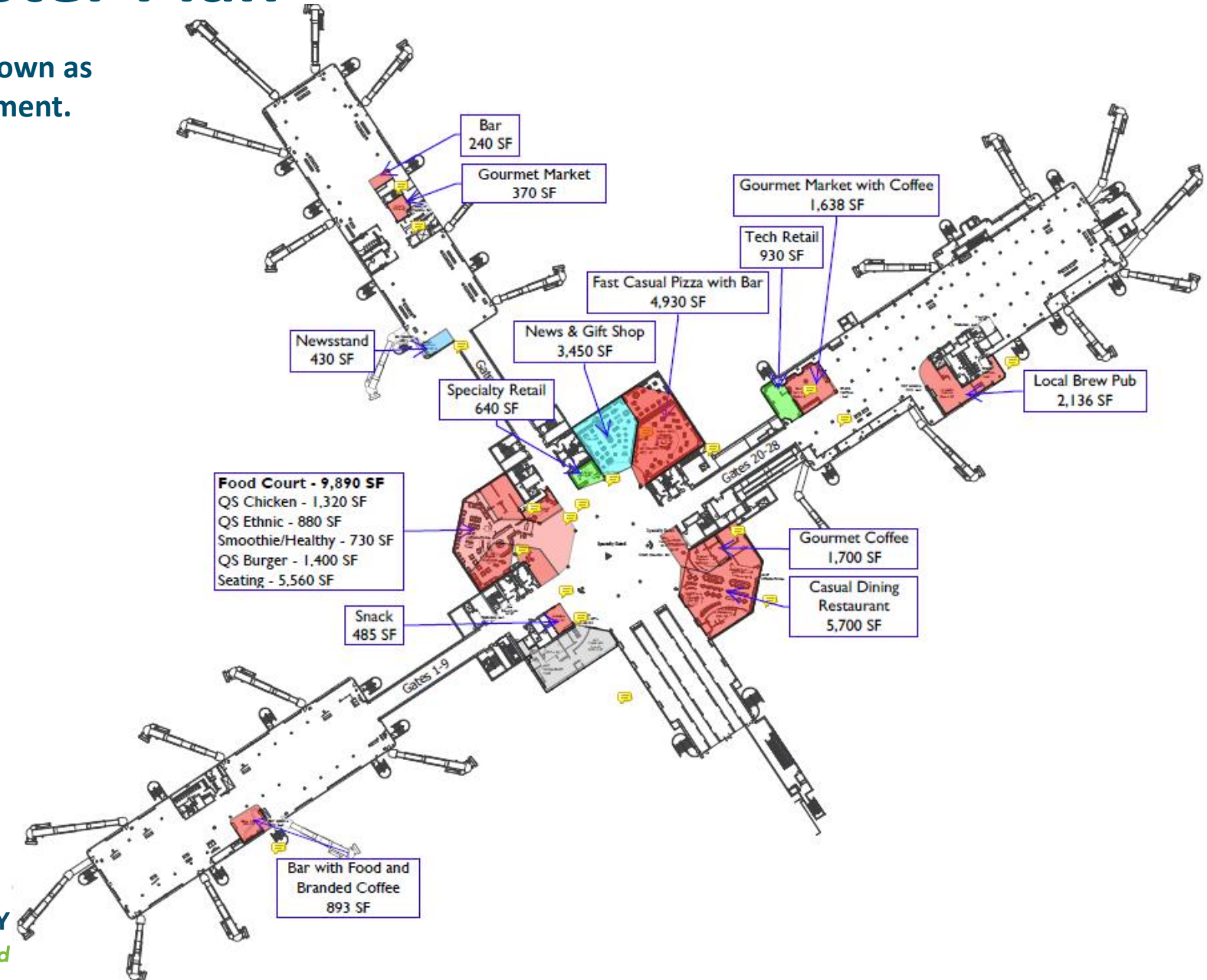
Category	Food Service	Convenience Retail	Specialty Retail	Duty Free Retail	Total
Existing Program	16,475	3,716	1,520	3,878	25,589
Planned Space	28,000	3,900	1,600	-	33,500
Supportable Space	27,800	4,100	2,400	-	34,300
Variance (Plan vs. Supportable)	200	(200)	(800)	-	(800)

- As possible, concession space in the hub was enlarged to achieve the supportable space projections and decrease overcrowding in food service locations
- A large news and gift shop in the hub alleviates a portion of the specialty retail shortfall in planned square footage
- Passenger forecasts for AS1 eliminate the need for duty free retail in the future, providing additional food service space

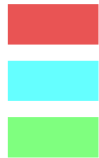


AS1 Concession Master Plan

Any brands included in the following slides are shown as examples only and do NOT constitute an endorsement.

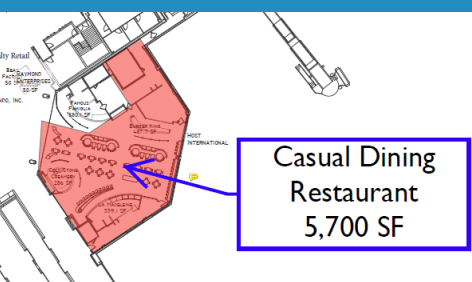


Food Service
Convenience Retail
Specialty Retail



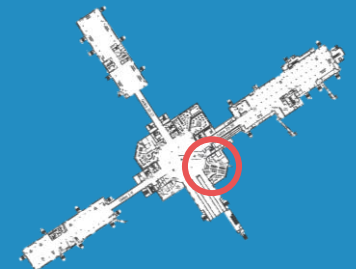
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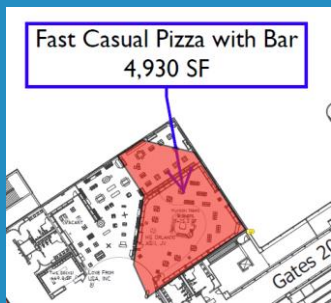
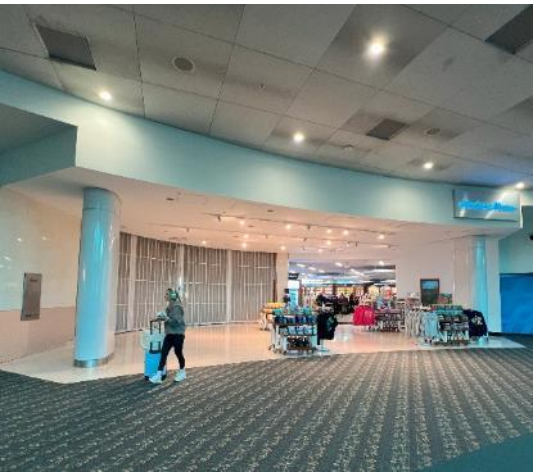
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AS1 Hub: Casual Dining Restaurant

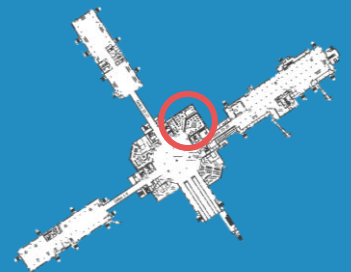
Reconcept undersized food court into a vibrant, contemporary restaurant offering an all-day menu, table service, full-service bar, and view of the airfield.





AS1 Hub: Fast Casual Pizza with Bar

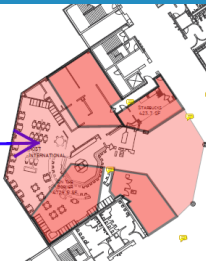
An inviting, multi-generational custom pizza concept, offering quick takeout service as well as in-unit seating and a full-service bar.





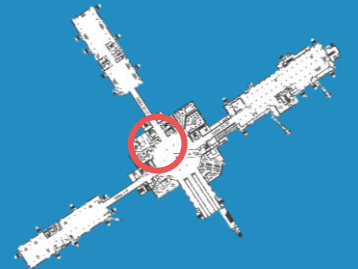
Food Court - 9,890 SF

QS Chicken - 1,320 SF
 QS Ethnic - 880 SF
 Smoothie/Healthy - 730 SF
 QS Burger - 1,400 SF
 Seating - 5,560 SF

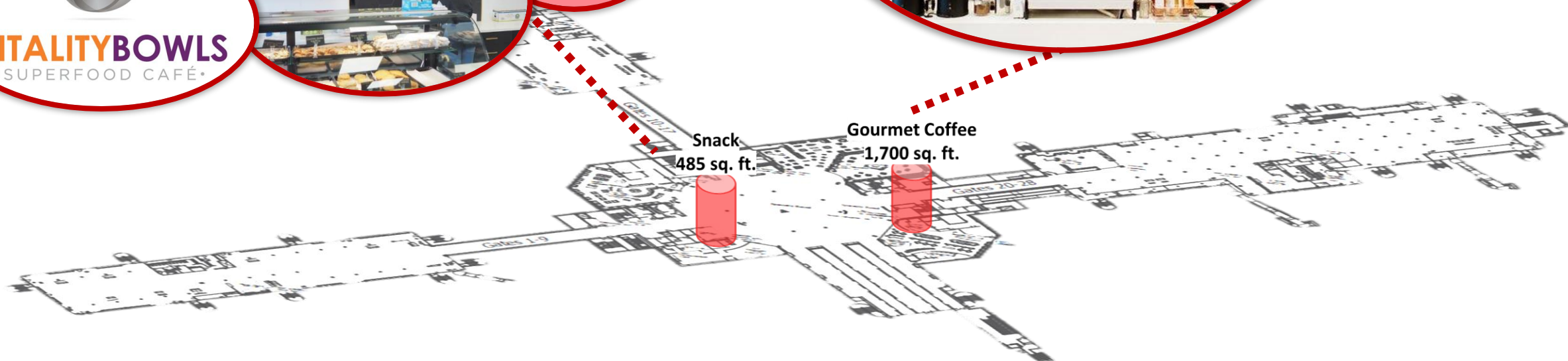


AS1 Hub: Food Court

Relocated and enlarged food court with four quick service concepts, including chicken, ethnic, smoothie/healthy, and burger with enhanced seating, visibility, and airfield views.



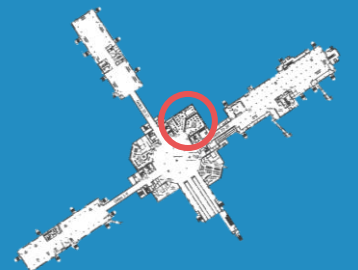
AS1 Hub: Additional Food Service





AS1 Hub: Retail

A central, visible retail node with a combination of travel essentials and specialty retail to maximize space and meet passenger wants and needs.



AS1: Wings



Bar
240 sq. ft.



Gourmet Market
370 sq. ft.



Newsstand
430 sq. ft.



Gourmet Market with Coffee
1,638 sq. ft.



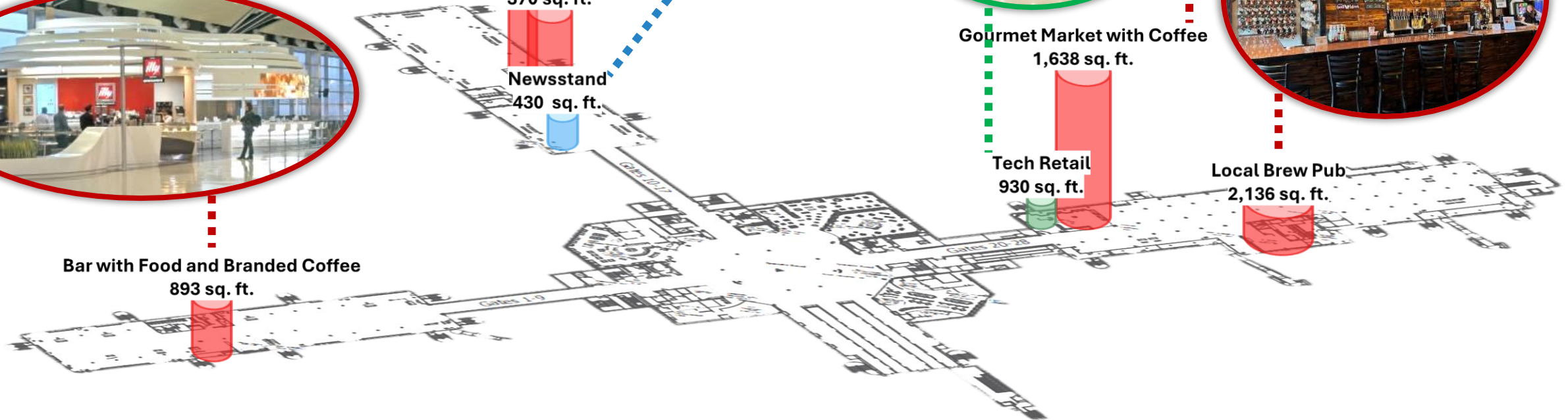
Tech Retail
930 sq. ft.



Local Brew Pub
2,136 sq. ft.



Bar with Food and Branded Coffee
893 sq. ft.



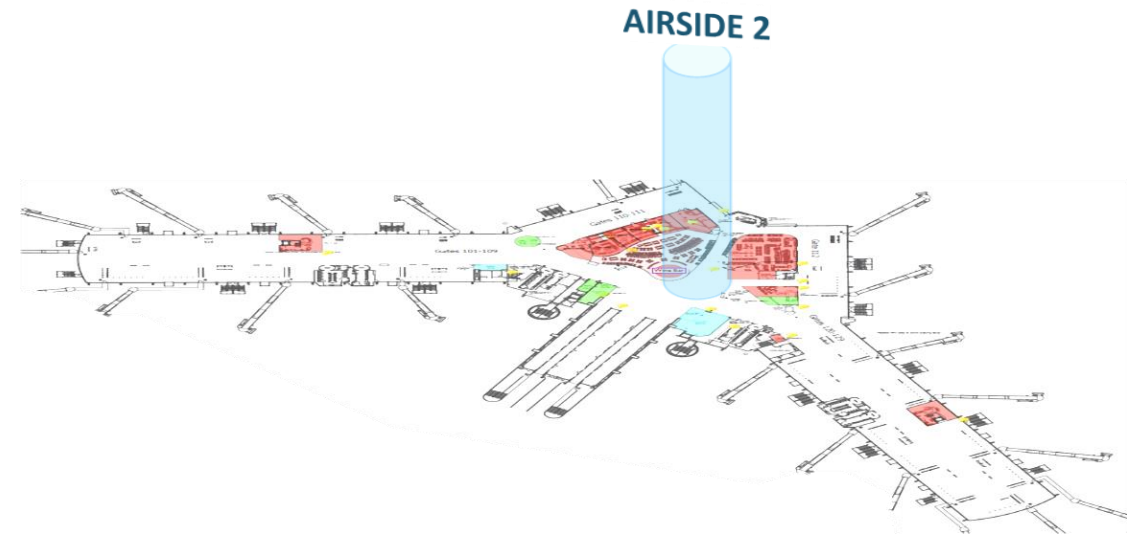


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Airside 2

Concession Concept Plan



AS2 Supportable Concession Space Summary

Category	Food Service	Convenience Retail	Specialty Retail	Duty Free Retail	Total
Existing Program	23,177	2,625	2,006	-	27,808
Planned Space	22,600	2,500	1,800	-	26,900
Supportable Space	28,000	4,100	2,400	-	34,500
Variance (Plan vs. Supportable)	(5,400)	(1,600)	(600)	-	(7,600)

- Due to the development of additional gates in the AS2 hub, approximately 1,500 sq. ft. was reallocated from concession space to circulation space
- A space-maximizing approach was taken to minimize the impact of the shortfall in concession space



AS2 Concession Master Plan

Food Service

Convenience Retail

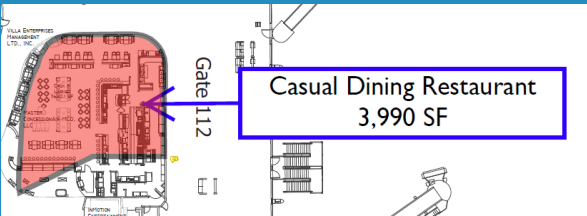
Specialty Retail

Proposed Expansion



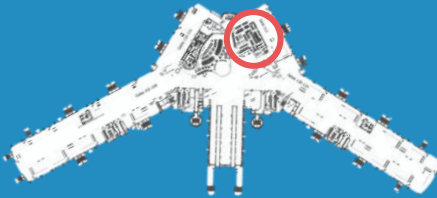
- Gourmet coffee in the hub was enlarged and relocated to accommodate additional volume without interfering with Airside circulation
- Gourmet market in the hub was pulled out of the casual dining restaurant and relocated to the food court
- A branded coffee requirement was added to the bars with food on the wings to ensure enhanced coffee service is accessible to passengers throughout the day

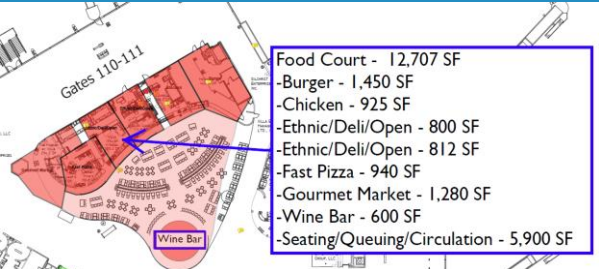
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AS2 Hub: Casual Dining Restaurant

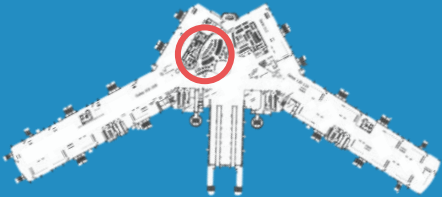
An energetic, popular concept offering an all-day menu, table service, and full-service bar.

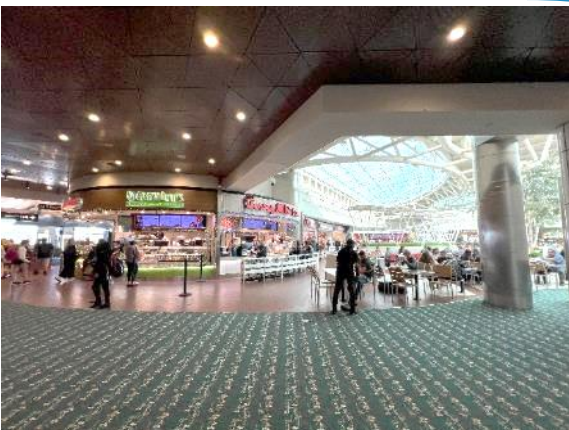




AS2 Hub: Food Court (Quick Service)

Bright, open, free-flowing food court with a mix of popular local, regional, and national concepts

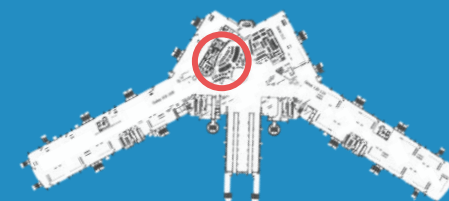




AS2 Hub: Food Court (Wine Bar & Market)

Wine Bar: Inviting, focal bar concept specializing in quality wines

Gourmet Market: Complementary market offering freshly-prepared foods and beverages

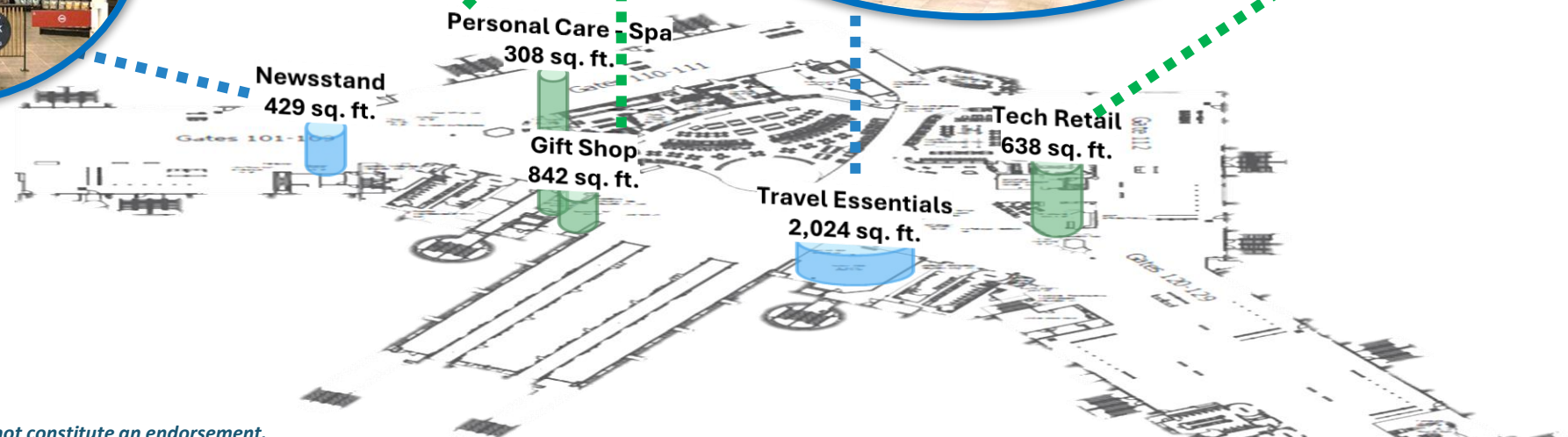


Food Court - 12,707 SF
 -Burger - 1,450 SF
 -Chicken - 925 SF
 -Ethnic/Deli/Open - 800 SF
 -Ethnic/Deli/Open - 812 SF
 -Fast Pizza - 940 SF
 -Gourmet Market - 1,280 SF
 -Wine Bar - 600 SF
 -Seating/Queuing/Circulation - 5,900 SF

AS2 Hub: Additional Food Service



AS2: Retail

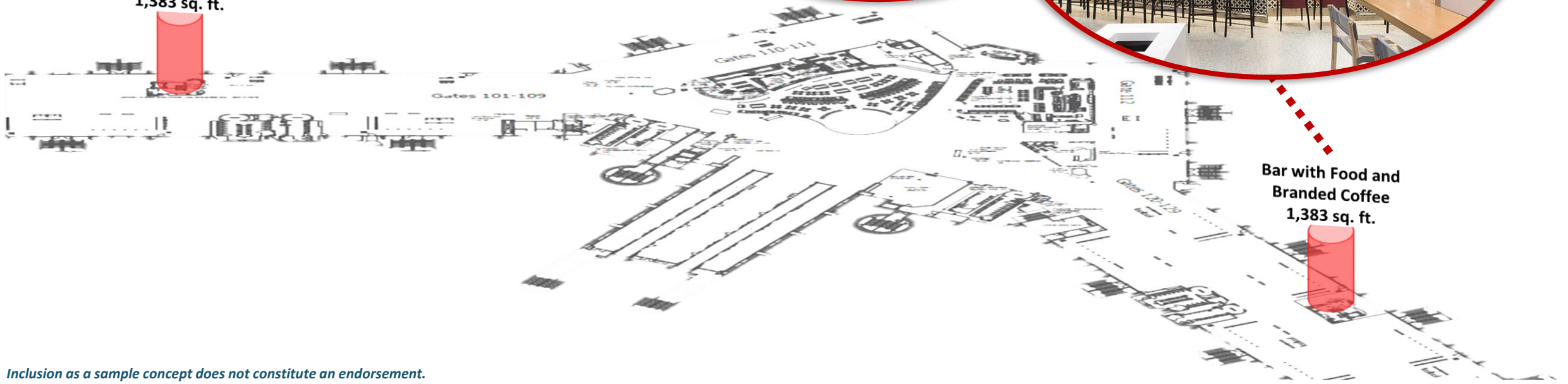


AS2: Wings



Bar with Food and
Branded Coffee
1,383 sq. ft.

Bar with Food and
Branded Coffee
1,383 sq. ft.



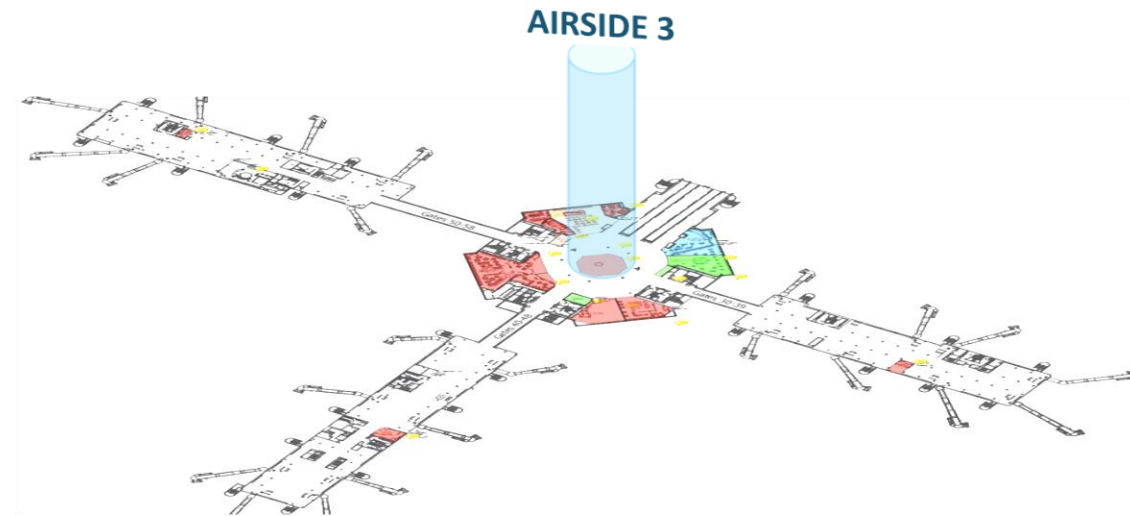


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Airside 3

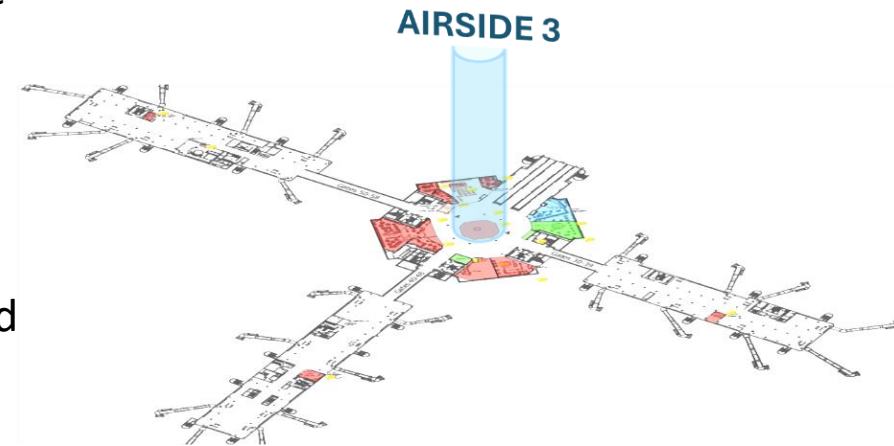
Concession Concept Plan



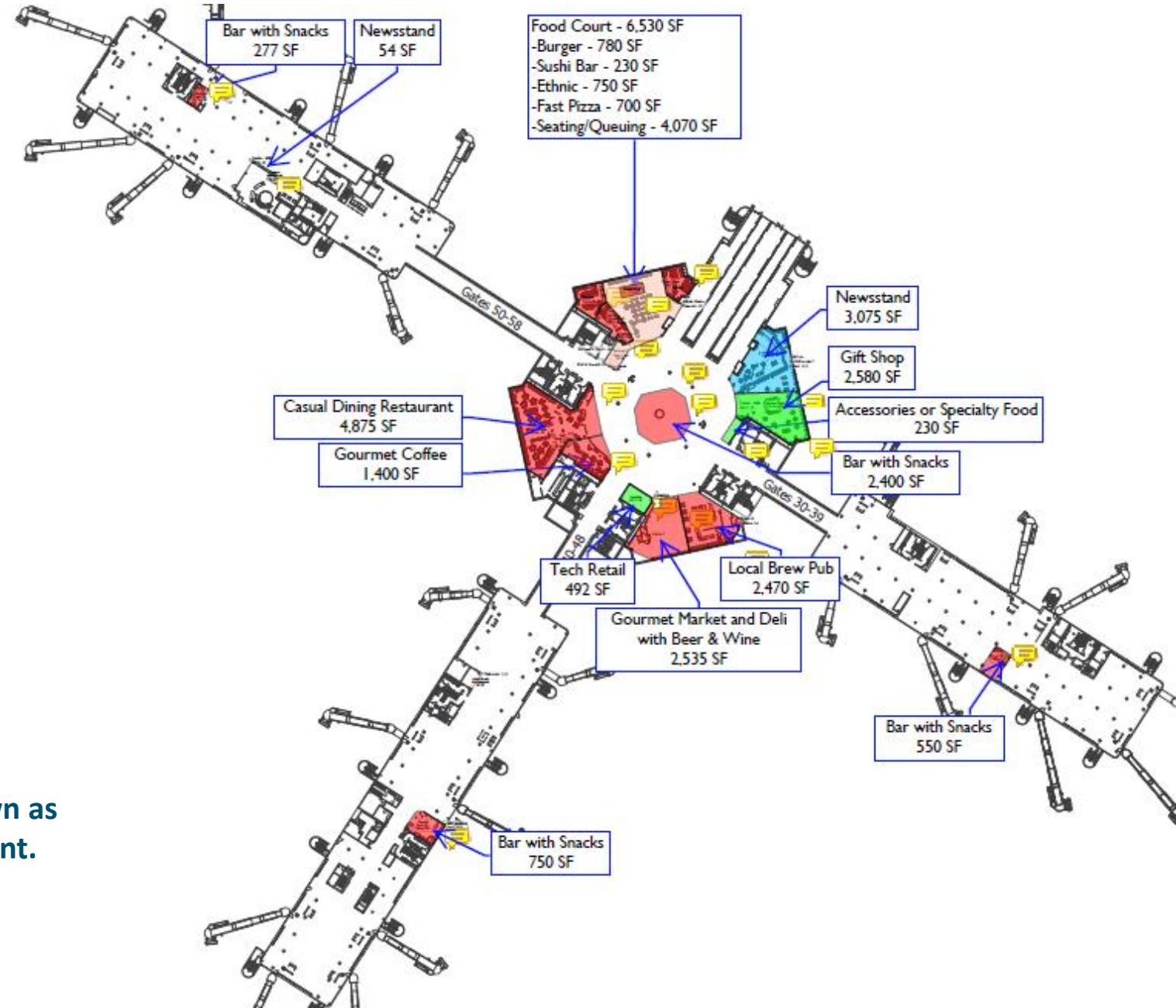
AS3 Supportable Concession Space Summary

Category	Food Service	Convenience Retail	Specialty Retail	Duty Free Retail	Total
Existing Program	15,015	3,648	3,091	-	21,754
Planned Space	21,800	3,100	3,300	-	28,200
Supportable Space	27,800	4,100	2,400	-	34,300
Variance (Plan vs. Supportable)	(6,000)	(1,000)	900	-	(6,100)

- Where possible, concession spaces have been enlarged or added to decrease the shortfall in planned vs. supportable concession space
- Dedicated gourmet coffee space to accommodate significant volume and queuing to minimize impact on circulation
- The large gourmet market with deli and bar in the hub complements the food court, providing passengers with an additional efficient, quality food service option



AS3 Concession Master Plan



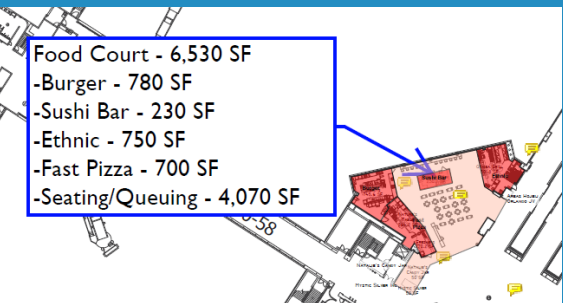
Food Service
Convenience Retail
Specialty Retail

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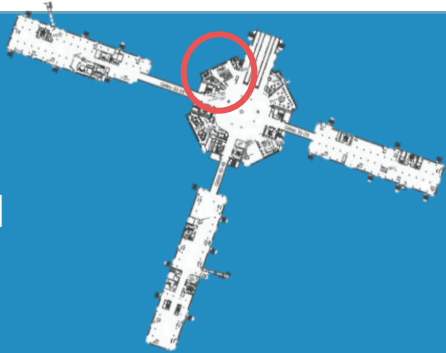
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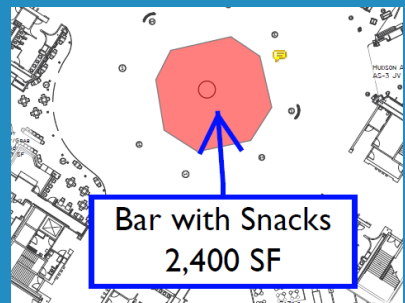
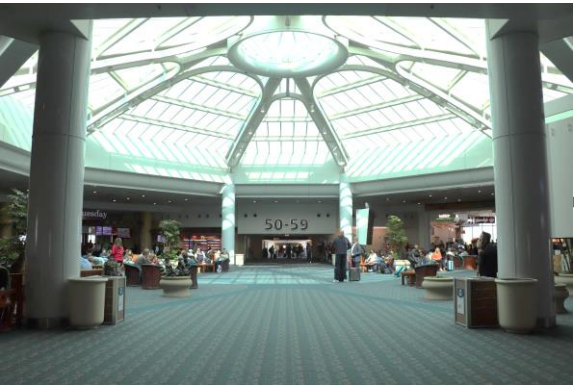
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AS3 Hub: Food Court

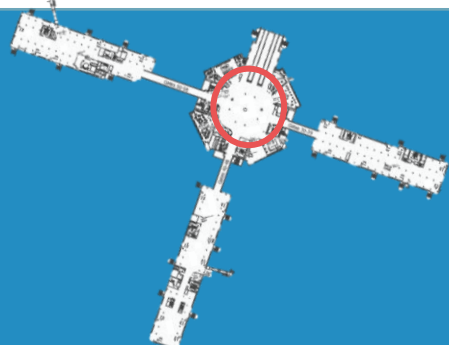
Contemporary, bright space offering a variety of customizable quick service concepts to appeal to all passengers and dietary needs and preferences





AS3 Hub: Bar with Snacks

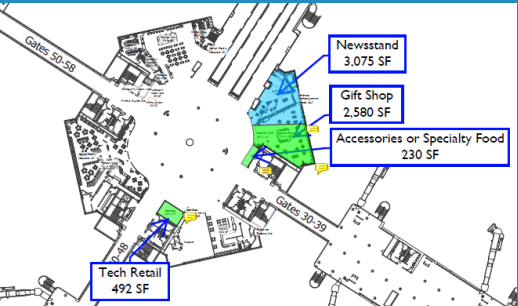
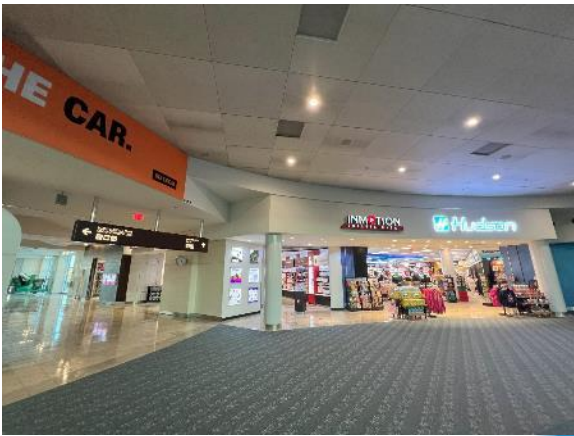
An eye-catching, central bar offering a variety of alcoholic beverages and lite fare



Inclusion as a sample concept does not constitute an endorsement.

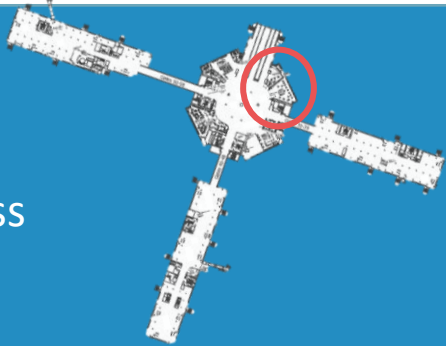
AS3 Hub: Additional Food Service





AS3 Hub: Retail

A variety of travel essentials and specialty retail to meet the wants and needs of passengers, including business travelers



Inclusion as a sample concept does not constitute an endorsement.

AS3: Wings



Bar with Snacks
277 sq. ft.

Newsstand
54 sq. ft.



Bar with Snacks
750 sq. ft.

Bar with Snacks
550 sq. ft.



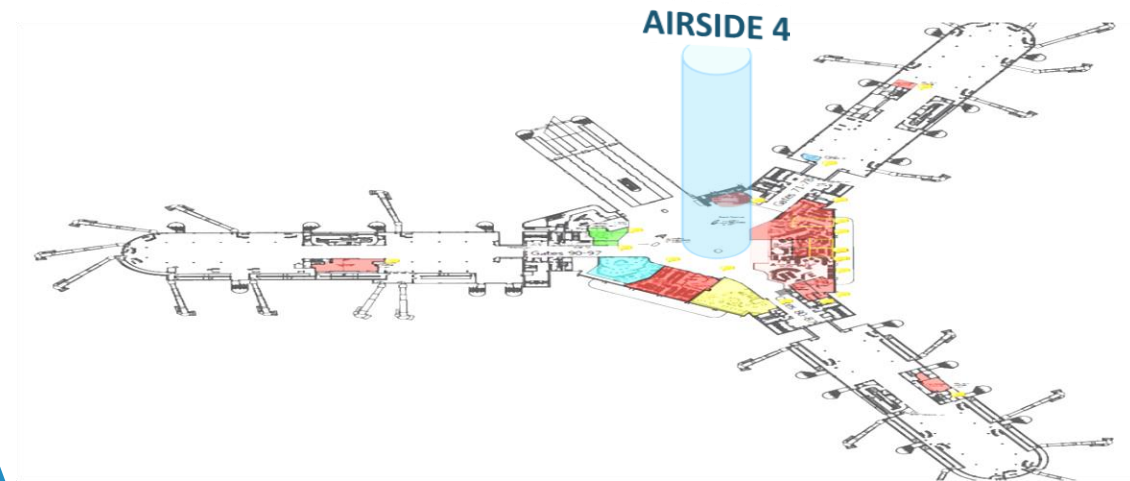


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Airside 4

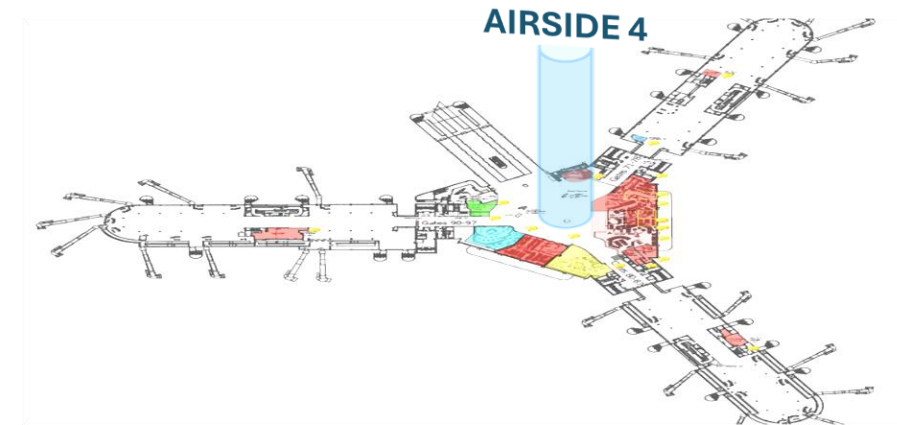
Concession Concept Plan



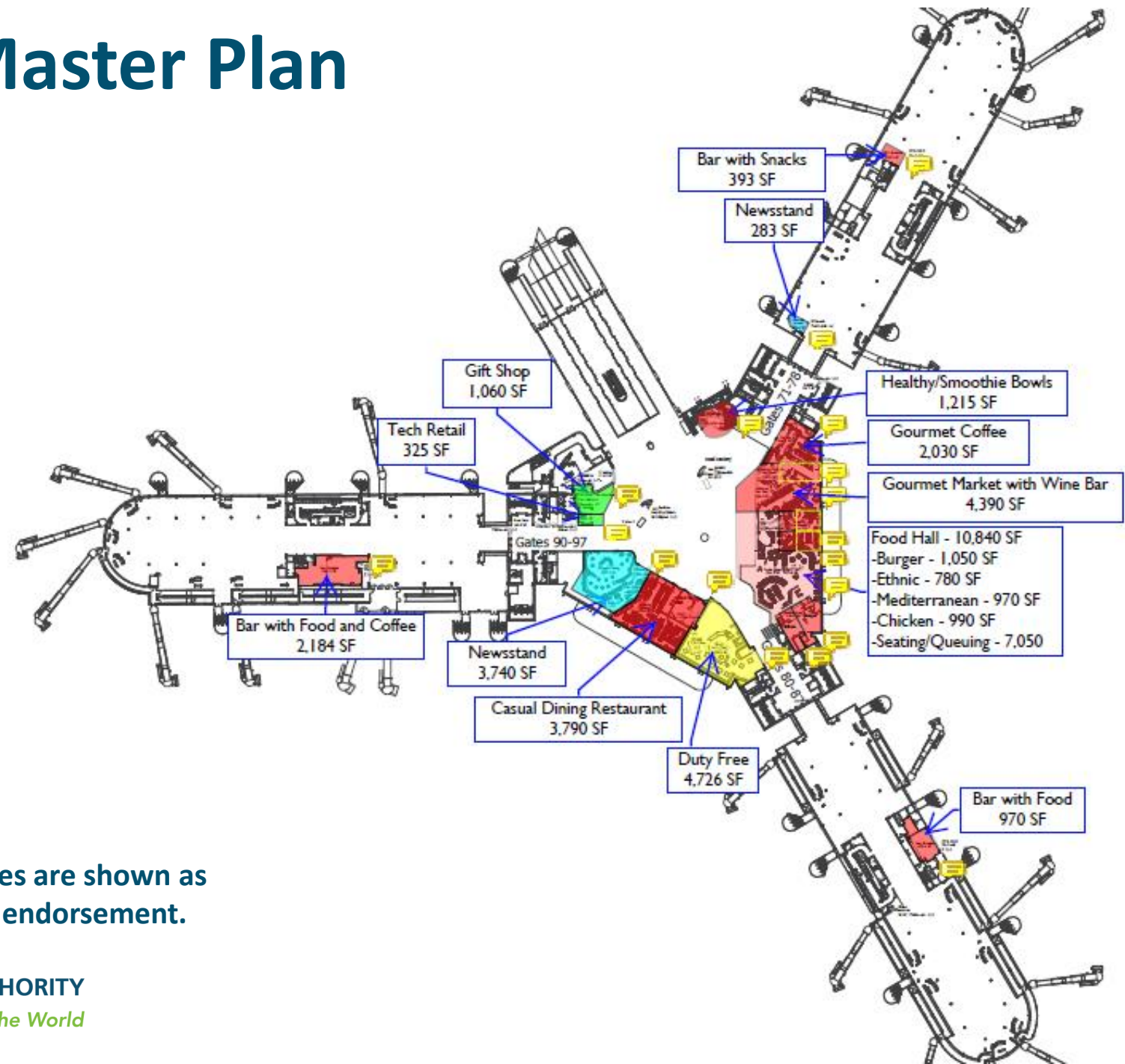
AS4 Supportable Concession Space Summary

Category	Food Service	Convenience Retail	Specialty Retail	Duty Free Retail	Total
Existing Program	22,714	2,521	1,800	5,032	32,067
Planned Space	25,800	4,000	1,400	4,700	35,900
Supportable Space	28,500	4,200	2,500	700	35,900
Variance (Plan vs. Supportable)	(2,700)	(200)	(1,100)	4,000	0

- The total planned concession space meets the total supportable space projections
 - The future reallocation of excess duty free retail space upon 3Sixty's existing lease expiration will alleviate the square footage shortfalls in the other concession categories
- Food service locations in the hub have been enlarged, where possible, to alleviate overcrowding in popular concepts, such as the food court



AS4 Concession Master Plan



Food Service



Convenience Retail



Specialty Retail

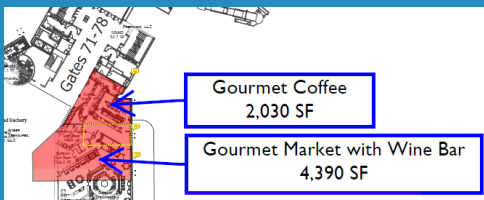


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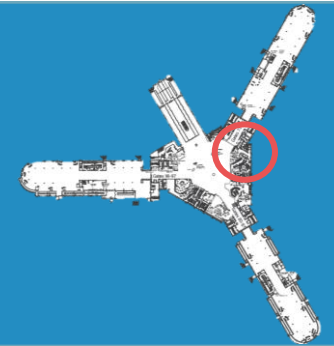
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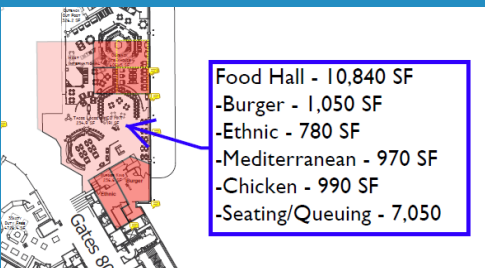
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AS4 Hub: Gourmet Coffee & Market with Wine Bar

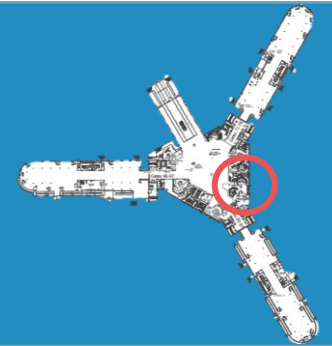
Two upscale concepts offering gourmet coffee, gourmet food, and an inviting wine bar to complement the new food hall



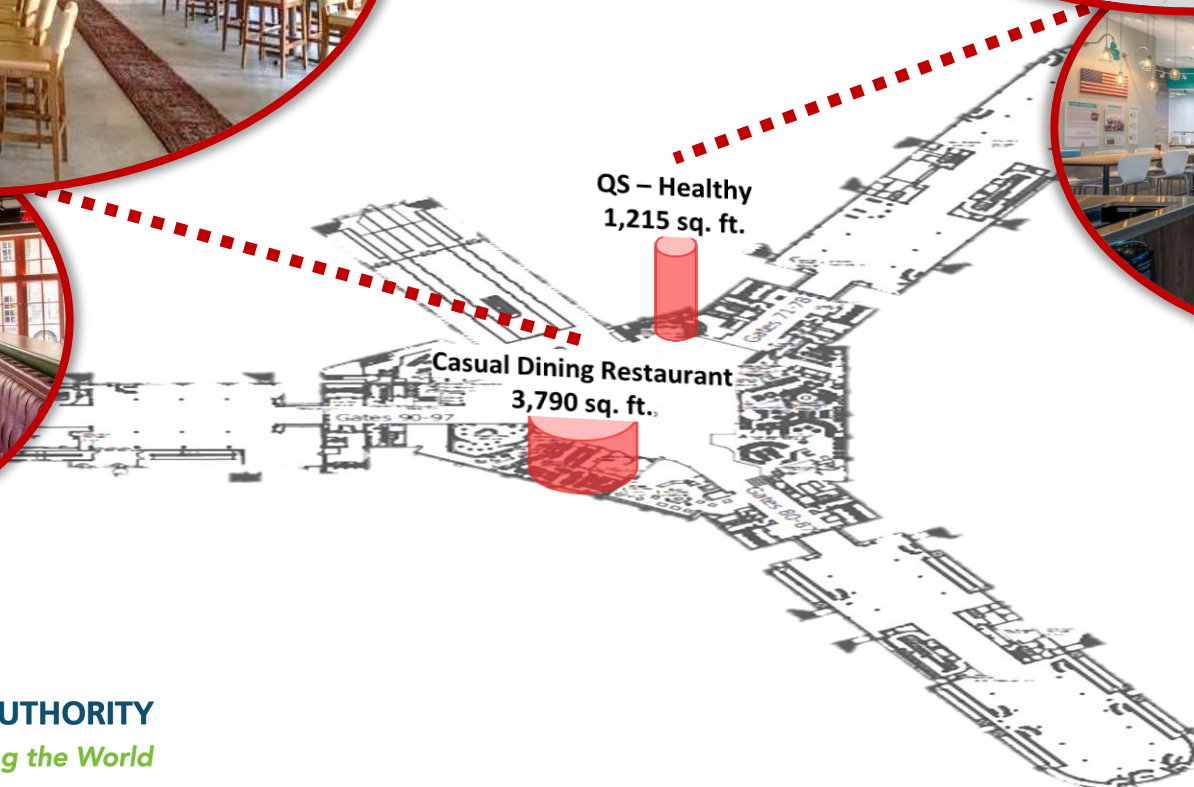


AS4 Hub: Food Hall

Reconfigured and open food hall interconnected with the gourmet market, offering a free-flowing, inviting dining experience for passengers



AS4 Hub: Additional Food Service

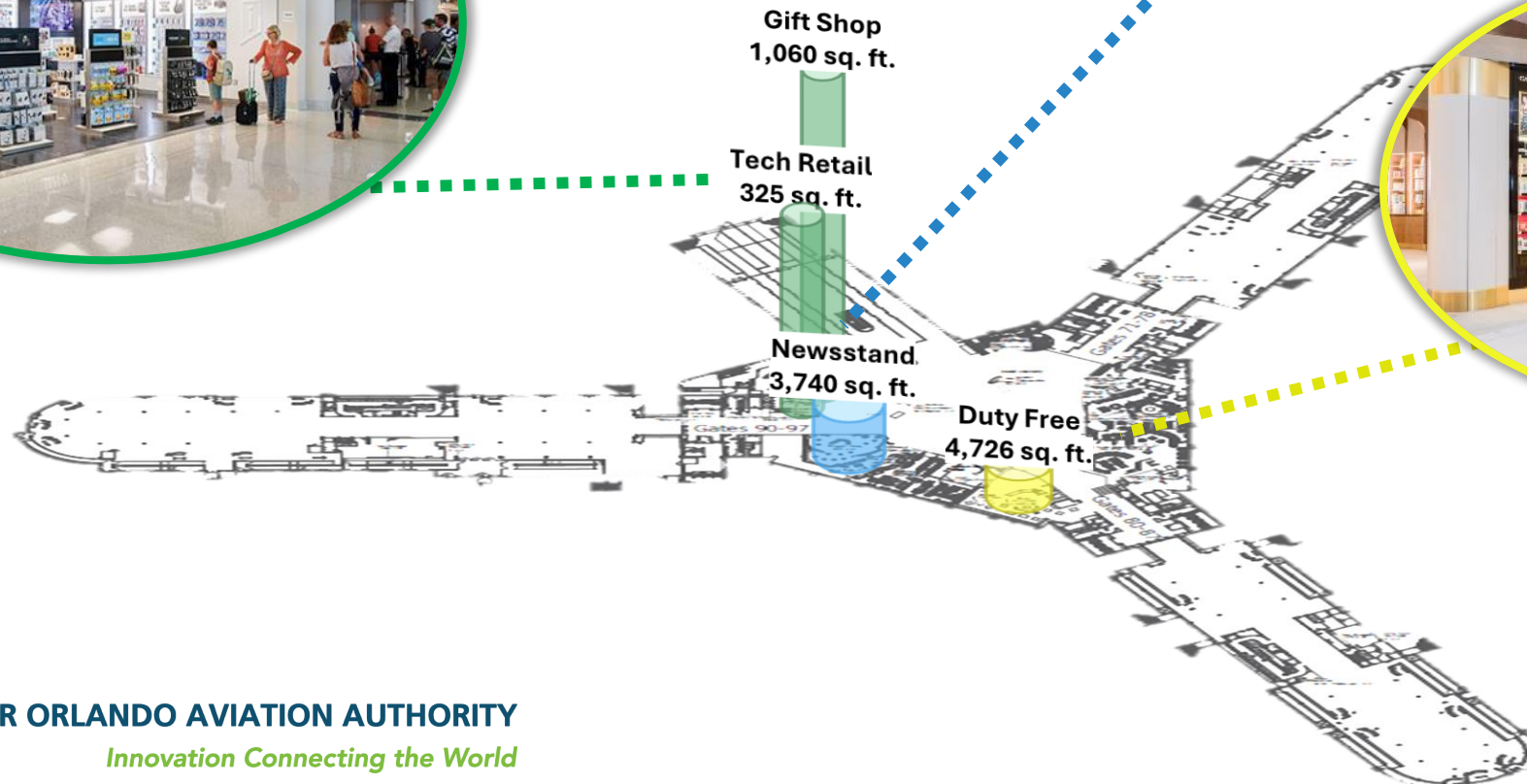


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AS4: Retail

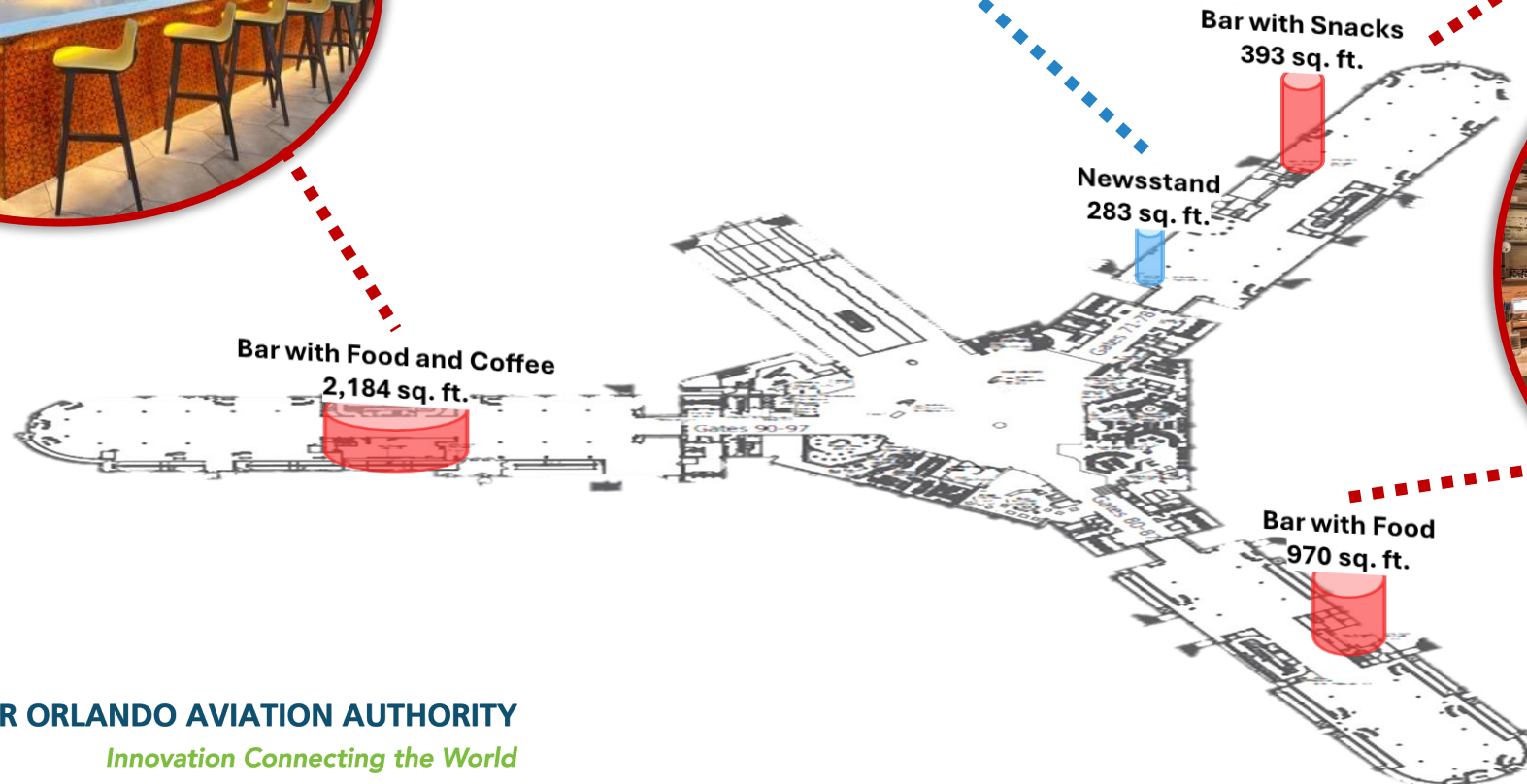


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AS4: Wings



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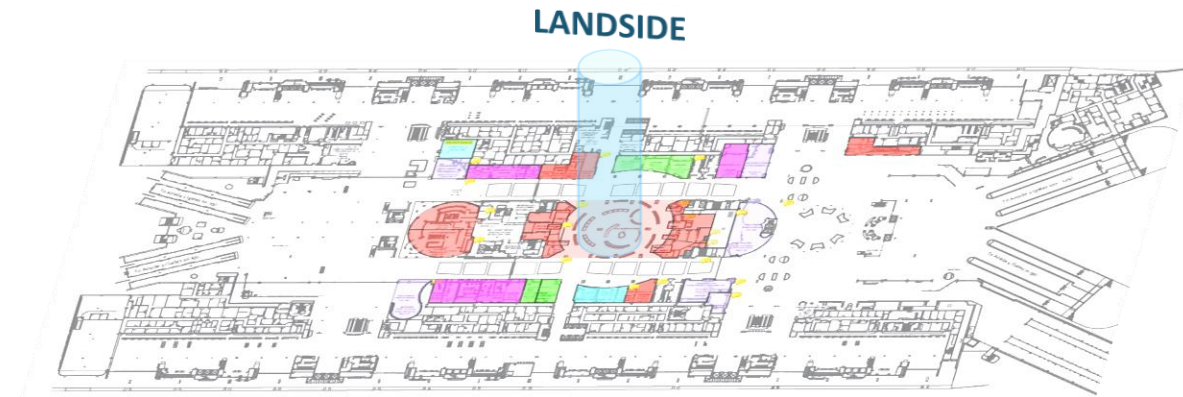


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Landside

Concession Concept Plan



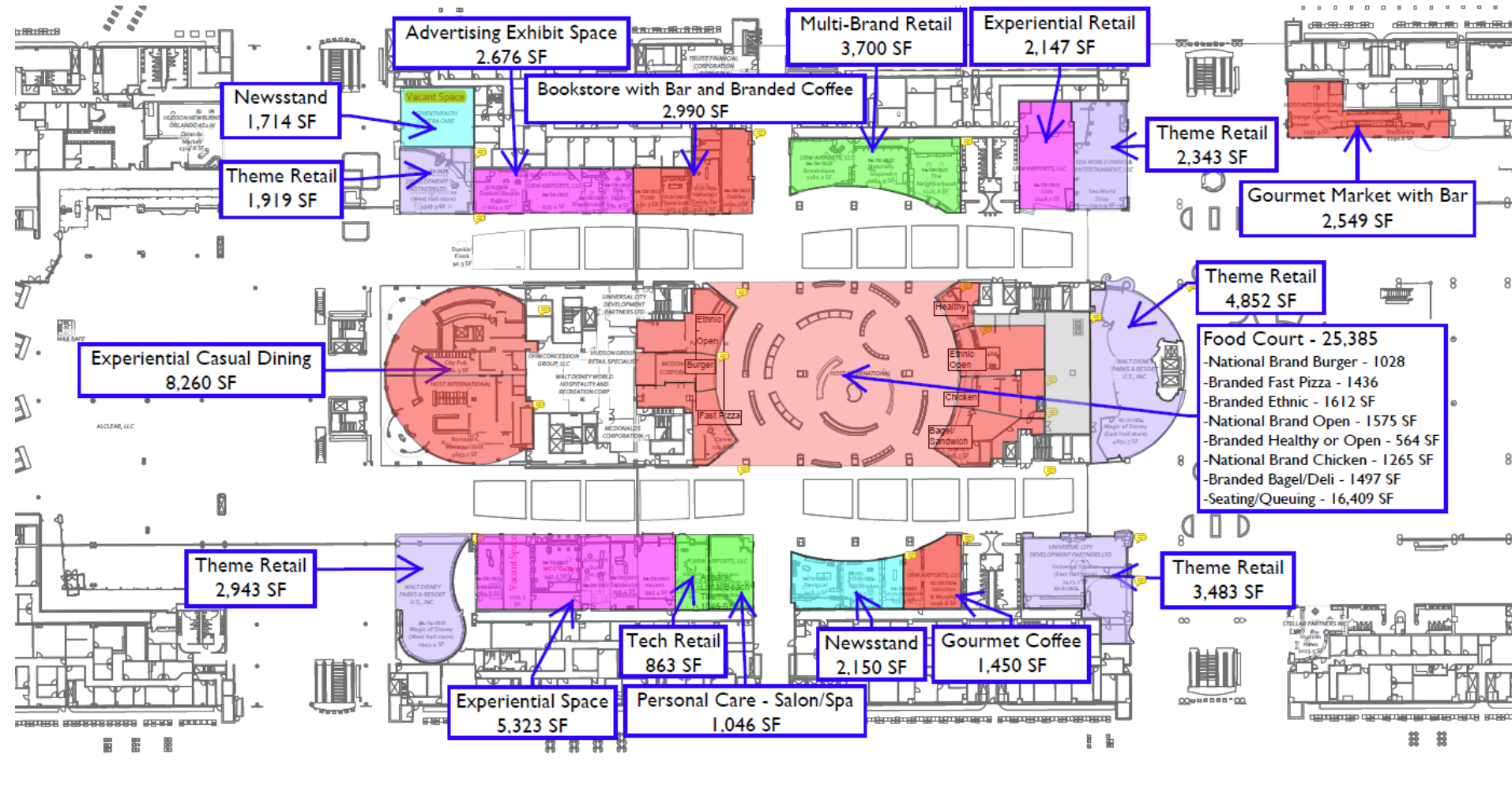
Landside Supportable Concession Space Summary

Category	Food Service	Convenience Retail	Specialty Retail	Duty Free Retail	Total
Existing Program	41,689	2,609	34,529	-	78,827
Planned Space	40,600	3,900	32,000	-	76,500
Supportable Space	29,800	2,700	18,600	-	51,100
Variance (Plan vs. Supportable)	10,800	1,200	13,400	-	25,400

- Excess food service space stems from oversized food court seating area and large experiential dining
- Future specialty should be more productive due to inclusion of combined concepts
- Multiple, underproductive spaces assembled to create opportunities for larger experiential concepts and advertising exhibits



Landside Concession Master Plan

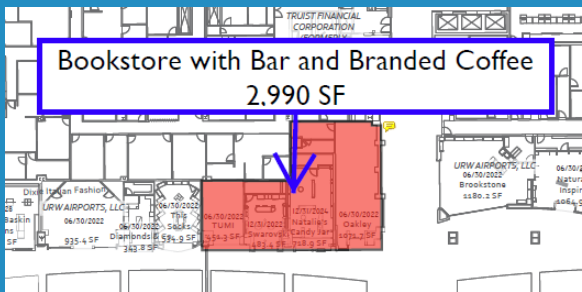


Food Service
Convenience Retail
Specialty Retail
Experiential Retail
Theme Retail



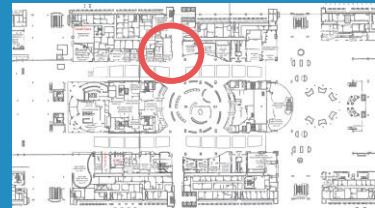
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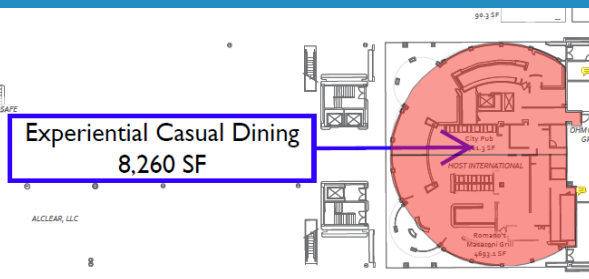
Any brands included in the following slides are shown as examples only and do NOT constitute an endorsement.



LS North: Bookstore with Bar and Branded Coffee

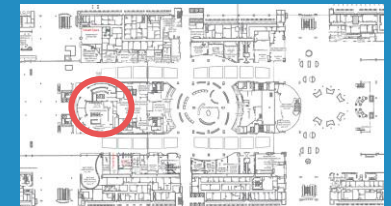
An inviting and relaxing environment offering gourmet coffee, alcoholic beverages, comfortable seating, and a selection of books for purchase

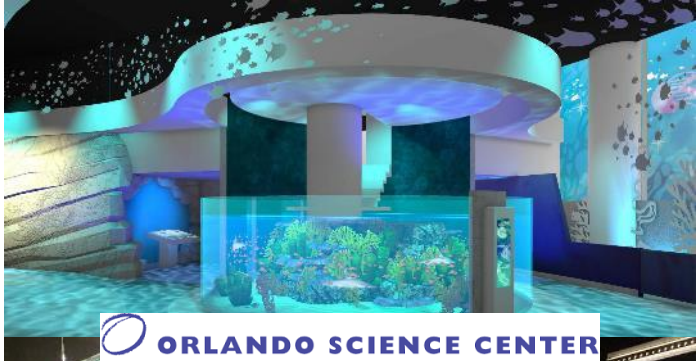




LS Center: Experiential Casual Dining

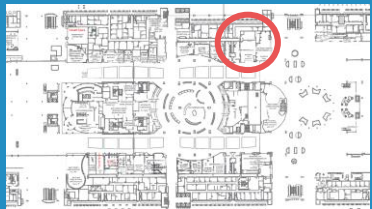
A contemporary and exciting dining environment offering quality food with a fun experience



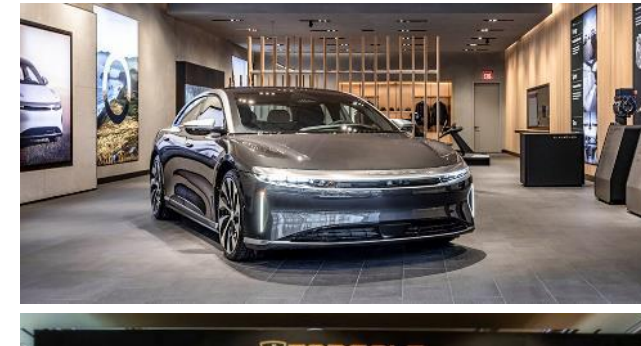
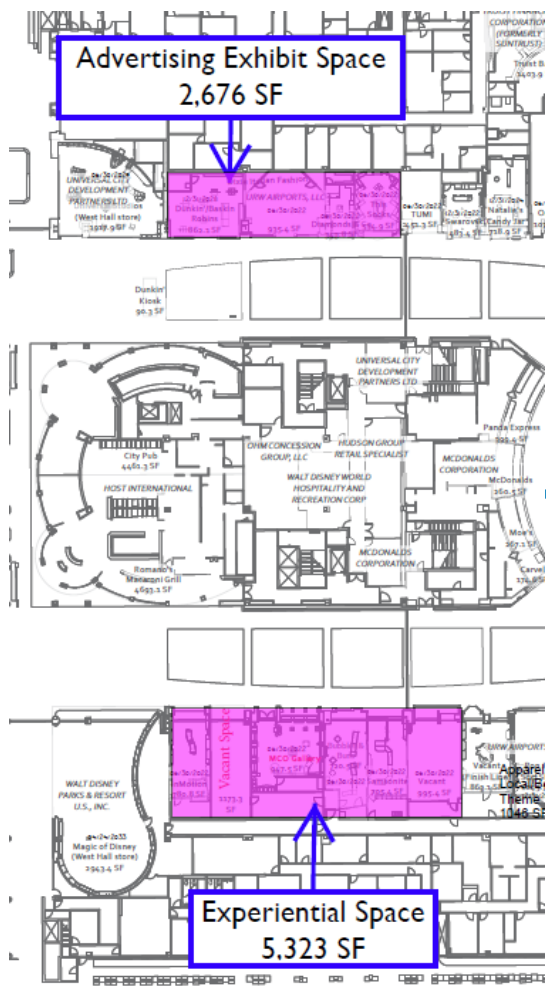


LS North: Experiential Retail

An inviting and entertaining space combining shopping and interactive experiences

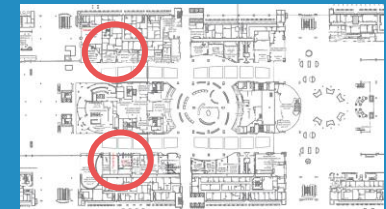


Inclusion as a sample concept does not constitute an endorsement.

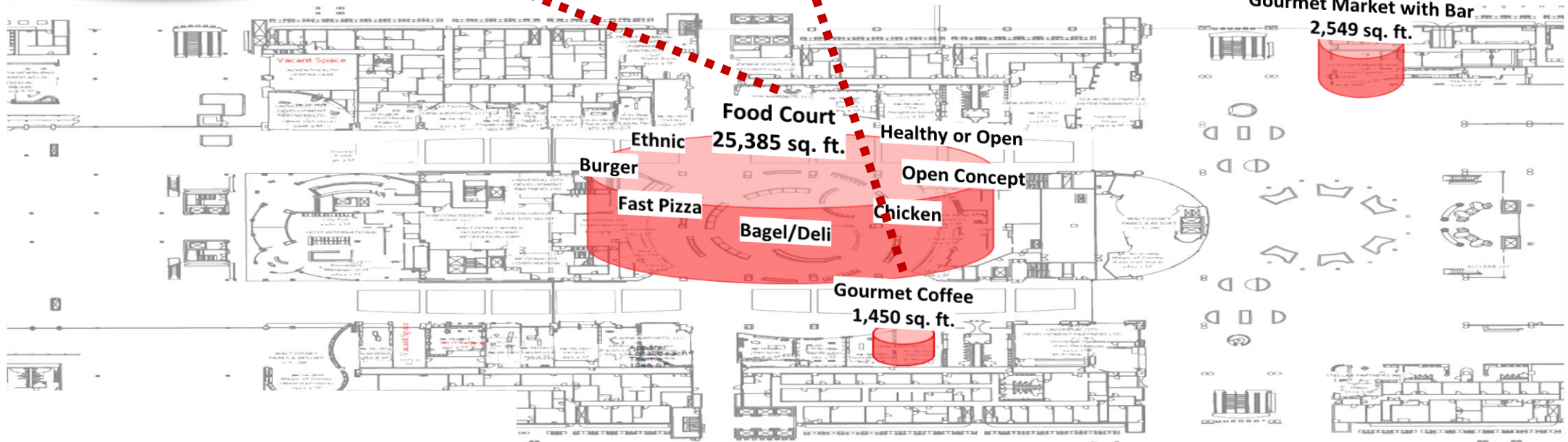


LS North & South: Experiential and Advertising Exhibit Spaces

A destination event space where passengers, hotel guests, and employees can have a great time!



Additional LS Food Service

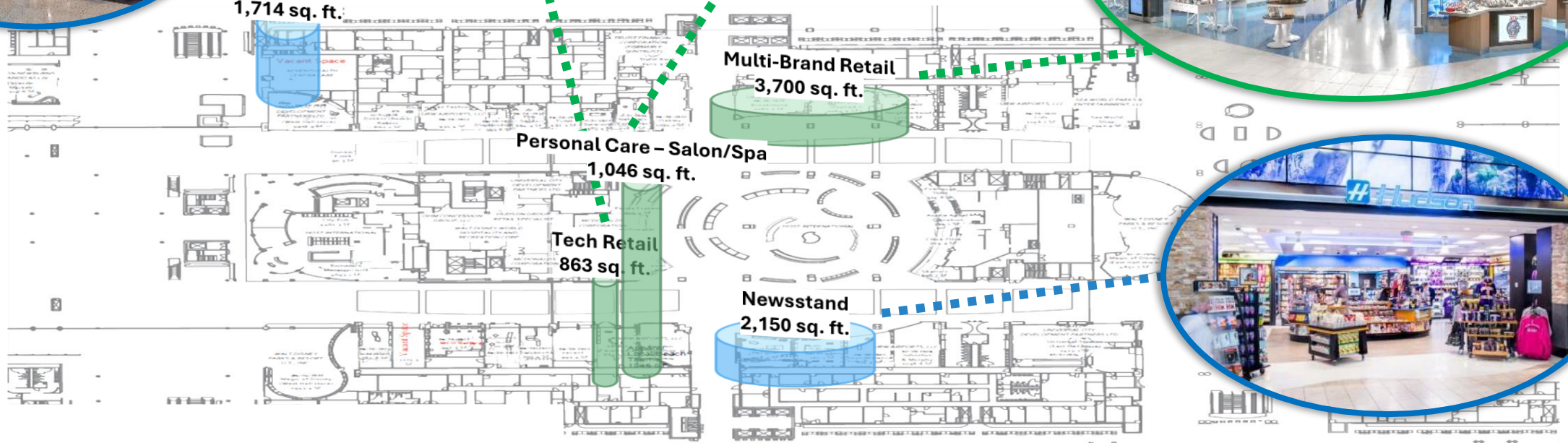


Landside Retail*

**Excludes Theme Retail*



Newsstand
1,714 sq. ft.





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Leasing Strategy



Leasing Strategy

- Multiple Primes
- Direct Negotiation
- Master Concessionaire

The Authority may use any or a combination of the above approaches to implement the concession master plan.



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Leasing Strategy: Multiple Primes

- Leases are entered into with multiple prime concessionaires, each having the right to operate several units
- Example: a food service concession package could consist of two food service units on AS1 and three units on AS2



Master Concession Air's package of concession spaces in Terminal C



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Leasing Strategy: Direct Negotiations



- The Authority directly negotiates leases for select concession units
- Example: the Authority directly negotiated leases with the theme park retailers (i.e., Disney, Universal, and SeaWorld). There are additional opportunities for specialty and experiential retail.



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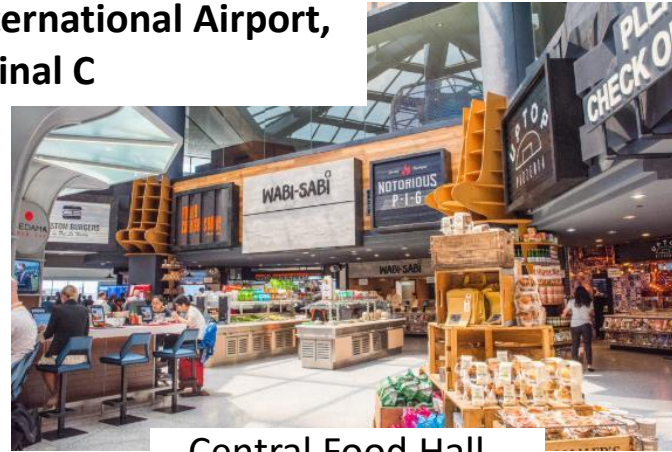
Leasing Strategy: Master Concessionaire

- One company operates all food and/or all retail locations in a program or terminal
- Example: the Authority could lease one or more portions of the Airport, such as an entire Airside, to one company

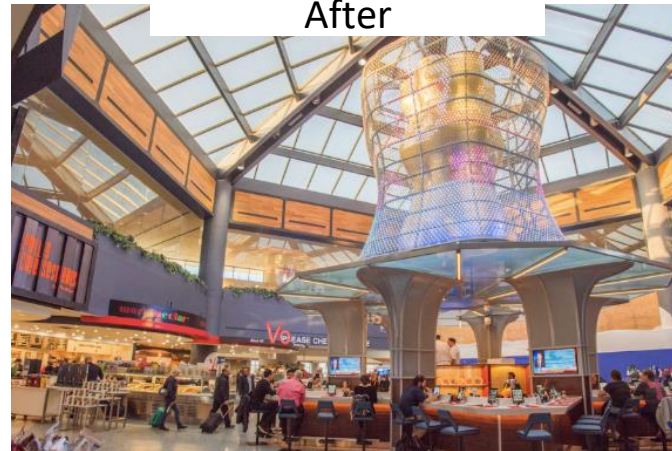


Newark Liberty International Airport,
Terminal C

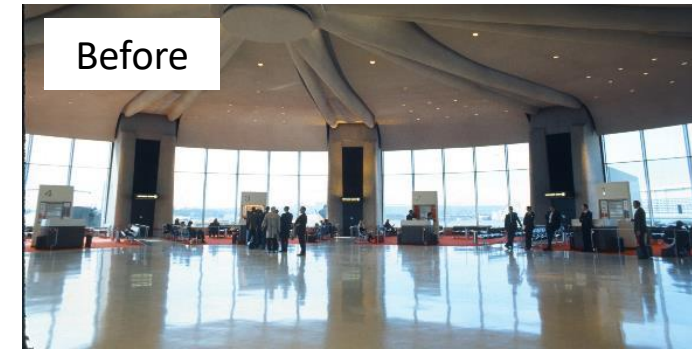
Central Food Hall -
Before



Central Food Hall -
After



Ronald Reagan Washington National Airport,
Terminal A



Before



After



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Leasing Strategy: Small Businesses and ACDBE's

- Orlando is home to many great small businesses with concepts suitable for the Airport's concession program
- The Authority wants to maximize small business and ACDBE participation in the future concession program
- The Multiple Primes and Master Concessionaire leasing strategies would have ACDBE participation goals based on the projected performance of the packages
- The Multiple Primes and Master Concessionaire leasing strategies allow small businesses and ACDBE's to participate in the Airport's concession program while potentially minimizing their financial risk, enhancing their ability to be successful
- ACDBEs and small businesses could also be candidates for directly-negotiated units



Leasing Strategy: Award Limitations

- The Authority may apply award limitations when implementing the concession master plan
- Award limitations ensure that the concession program has a variety of operators to enhance competition, driving higher standards for concept freshness and customer service
- Award limitations may be set by concession category (i.e., food service vs. retail) and/or space allocation (based on total available concession space in Terminals A and B)



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Schedule and Next Steps



Next Steps

- Host Industry Day(s) to promote the upcoming opportunities and provide information about the upcoming RFPs
- Finalize the leasing strategy for the upcoming solicitation
- Approve strategic lease extensions to enable the implementation of the concession master plan while maintaining the level of service for passengers (April Board Meeting)
- Prepare and issue the RFP



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SCHEDULE

Industry Days:

April 8, 2024

April 12, 2024

April 16, 2024

First RFP Issuance: May 2024

Proposals Due: July 2024

Notice of Award: Oct. 2024

Future RFPs:

- Phase 2: November 2024

- Phase 3: May 2025

Discussion



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