

ADR Program Briefing

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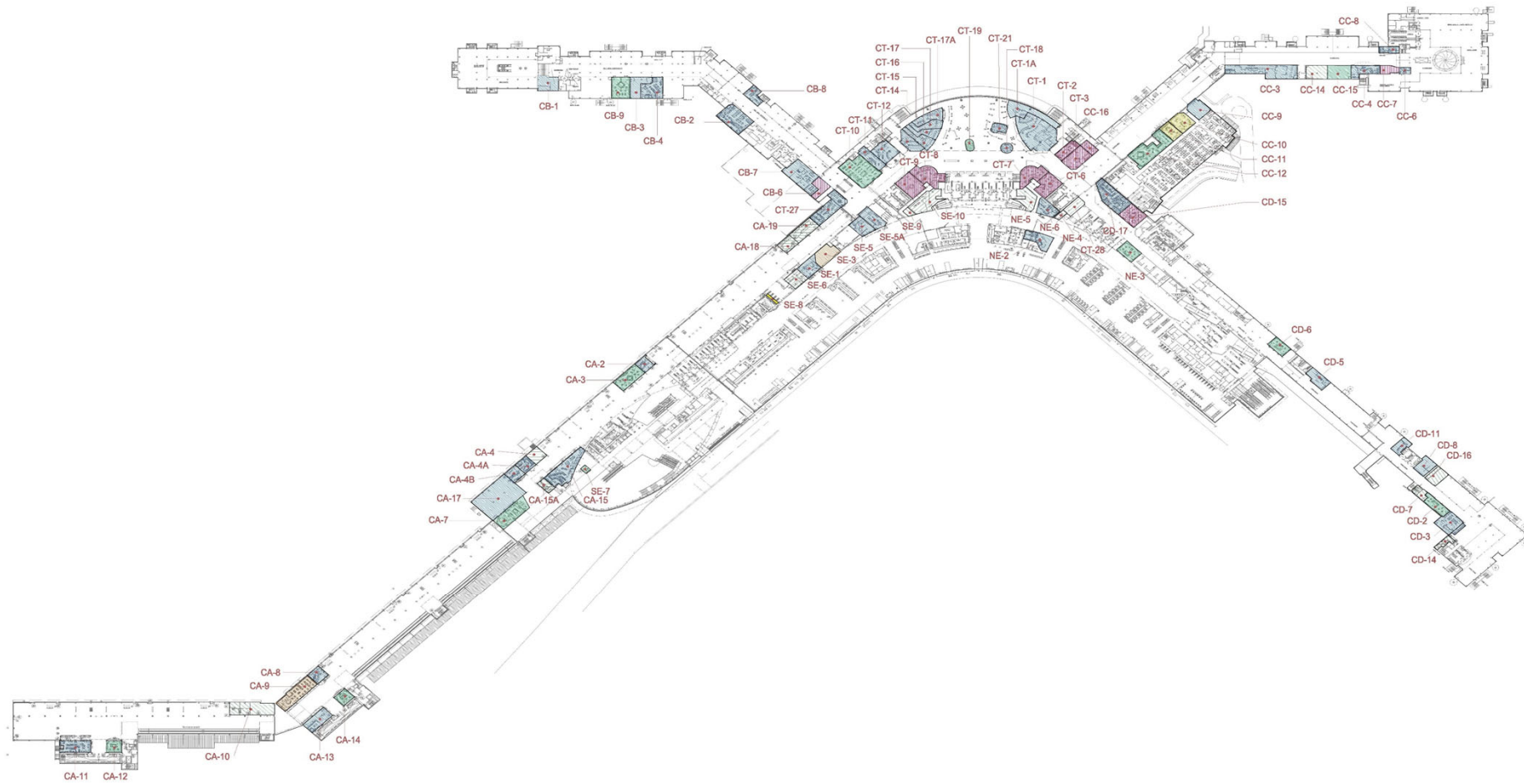
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Agenda

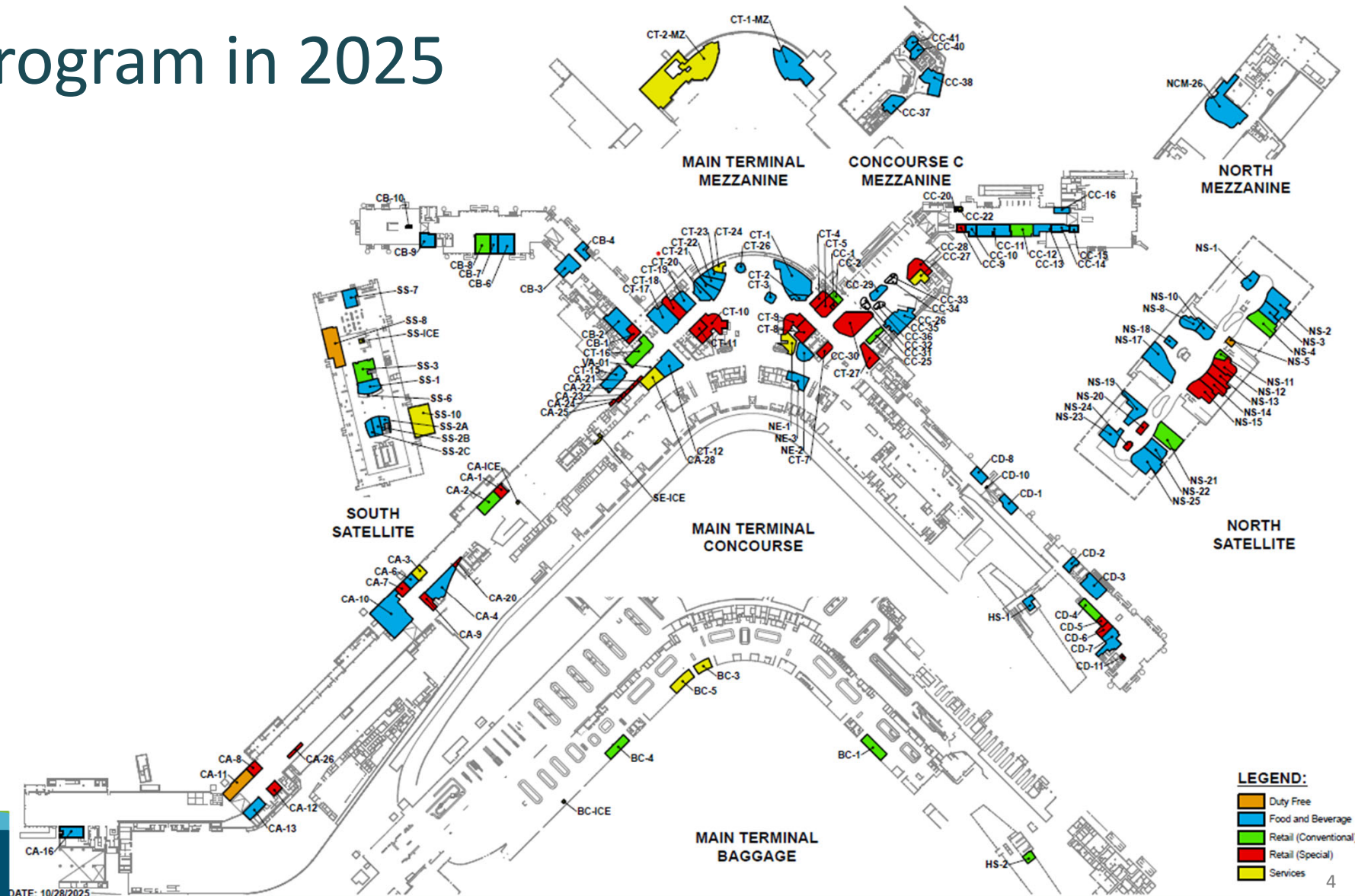
- Review Master Plan Highlights
- Review of Commission Goals
- ADR Performance Metrics
- ADR Redevelopment Going Forward
- Evolution of the ADR Kiosk Program
- 2025 Cultural Connections & In-Terminals Activations

ADR Program in 2015

EXISTING ADR UNITS
JANUARY 2015



ADR Program in 2025



ADR Master Plan Implementation

Activity	2015	Current
Total Number of ADR Locations	90	130 (includes upcoming CCE locations)
Total ADR Gross Sales	\$269.7 Million	\$440.0 Million 2024
Total Number of Companies in the ADR Program	29	44

Commission Goals for the ADR Master Plan

- Grow sales per enplanement (SPE) by 40%.
- Reach and remain within the top 10 North America airports has ranked by sales per enplanement.
- Grow gross revenue to the Port by 50%.
- Grow employment by 40%.
- Grow shares of sales generated by small, disadvantaged, and/or local business to 40% of total sales.
- Create an aspirational objective of increasing ACDBE gross sales to 25% of total sales.

Commission Goal Comparison

Goal	2015	2024/2025	Percent Difference
SPE Growth of 40%	\$11.33	\$21.63 (through Q2 2025)	90.0%
Top 10 Airport by SPE		10 th	
Revenue to Port 50% Growth	\$34.4 Million	\$69.2 Million	101.2%
Employment Growth by 40%	1,631	Approximately 2,300	41%
Small, Disadvantaged, Local Business 40% of sales		43.1% of Gross Sales (2024)	
ACDBE Goal of 25% of sales		28.3% (through Q2 2025)	

2024 ADR Company Breakdown

Category	Total Companies	Percentage
Direct Lease Only	9	20%
Joint Venture Only	9	20%
Combination Direct and Joint Venture	4	10%
Total ACDBE Companies	22	50%
Non-ACDBE Companies	22	50%
Total Companies	44	
Category	Number of Locations	Percentage
ACDBE Direct Leases	21	18%
ACDBE Joint Venture Leases	61	52%
Non-ACDBE Leases	36	30%
Total Location	118	
Category	Total Lease Agreements	Percentage
ACDBE Direct Leases	17	24%
ACDBE Joint Venture Leases	23	32%
Non-ACDBE Leases	32	44%
Total Leases	72	

ADR Re-Development Going Forward

- Within the next ten (10) years, the following number of ADR locations will naturally expire. Staff will return to Commission for authorization to release future Requests for Proposals (RFP's).

Category	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035
F&B	6					1		3	2	19
Retail	7	6	1			5		7	3	3
Total	13	6	1	0	0	6	0	10	5	22

EVOLUTION OF THE ADR KIOSK PROGRAM

Program Background

- 2012: ADR launched the first Introductory incubator location in North Satellite.
- 2015: Introduced the first three (3) Introductory kiosks in Concourse C; expanded the program by two more locations in Concourse A in 2022.
- 2016: Introduced the first two (2) Intermediate locations (tenant built & owned) on Concourse A; expanded the program by two more locations in Concourse N in 2023.
- 2020: Introduced the first Small Business Vending locations during COVID.
- 2024: Introduced the first Kick-Starter location in GML hall in June.
- 2025: Began construction on the first (2) F&B Incubator locations in any airport; RFI closed 11/13 and tenant operation will begin in **Q1 2026**.
- **2026**: Introducing six(6) new introductory locations in the Concourse C Expansion.

Lessons Learned

Successes

- Long-standing ADR program.
- Lowers barriers to entry for micro businesses.
- Industry-wide and local community recognition.
- Multiple successful tenants

Shortages

- Program lacked actionable strategy around purpose/mission and strategic plan inclusion.
- Complex process for new applicants with limited opportunities.
- Inconsistent outreach based on opportunity vs. programming within the small business community.
- Lacked development & intervention methodology and leveraging of Port resources.

Improvements

- Established program name and structure.
- Simplified to an RFI process and increased the types and number of available opportunities
- Revised strategy to optimize Port communication channels and outreach resources.
- Created tenant assessment measures, training, and mentorship networking.

ADR Kiosk Program: Reimagined

- **SEA Sparks** - Incubate. Accelerate. Innovate.
 - **PROGRAM OBJECTIVES**
 - Lower barriers to entry for micro businesses.
 - Improve visibility of future ADR small business opportunities.
 - Elevate and amplify culturally inclusive storytelling.
- Limited term micro and small business opportunities.
- Limited investment requirements vs full RFP build-out and operation

SEA Sparks Categories

Category	# of Spaces	Initial Term	Maximum Term
Kick-Starter	1	Six (6) Months	One (1) Year
Specialty Retail Incubator	8	One (1) Year	Two (2) Years
Small Business Vending	6	One (1) Year	Two (2) Years
Specialty Retail Accelerator	4	Three (3) Years	Five (5) Years
F&B Incubator	2	Two (2) Years	Three (3) Years
Total Number of Opportunities 21			

Communication & Outreach

- Increase awareness through enhanced content creation and internal communication channels.
- Partner with local/regional organizations and Chambers of Commerce.
- Utilize Industry Trades & Organization Sites such as ARRA, AMAC, ACI-NA, OMWBE, etc.

Kick-Starters



Small Business Vending



Specialty Retail Incubator



Specialty Retail Accelerator



Opening Q1 2026

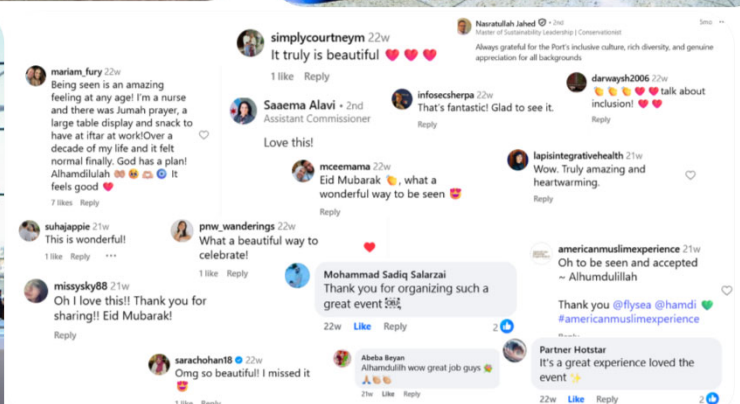
Central Terminal F&B Incubator



B Concourse F&B Incubator



Cultural Connections & In-Terminal Activations



QUESTIONS