

2025 ACI-NA Concessions Benchmarking Survey (Part 2: Food and Beverage)

General Information

The Concessions Benchmarking Survey is designed by the Steering Group of the ACI-NA Commercial Management Committee to collect important airport concession data, with the goal to build a comprehensive database of key industry measures that member airports can use for comparing and contrasting with their peers. Survey findings will be presented in the Summer to ACI-NA members. All participating airports will receive access to the survey data and summary presentation.

Please complete the survey no later than Friday, April 11, 2025.

This is Part 2 of the survey with a focus on your Food & Beverage program. Part 1 of the survey is about General Information about your airport concession program. Part 3 of the survey focuses on Duty Free, News & Gift, Specialty Retail and Airport Lounges. If you do not have the answer to certain questions, please feel free to leave it blank.

Canadian Airports: Annualized Exchange Rate for 2025 is \$0.70 (i.e. \$100 CAD = \$70 USD)

If you have any questions, please contact Philippe Villard at pvillard@airportscouncil.org and Pragnan Pande at ppande@airportscouncil.org. Thank you very much for your participation.

Your information *

Airport Three Letter Code:

Email
Address:

Food and Beverage General Questions

Please use the following definitions for questions on this Part 2 of the survey:

Prime operator - Airport leases packages of locations to one or more operators, each of which has multiple locations (more than 3) within the airport.

Master concessionaire - Airport leases all food service concessions to a single operator, who may or may not also operate retail. The Master Concessionaire may sublease some of the locations to other operators.

Direct leasing - Airport leases individual locations or small groups of locations (no more than 3) directly with the operators.

Developer/manager - Airport has agreement with a third party to develop/lease and manage the concessions without operating any directly. Developer can invest in the facilities directly.

Fast Food/Quick Service - Food is served at counters or is pre-prepared for "grab and go." Food may be quickly prepared to order, and may be branded or nonbranded.

Sit Down/Casual/Bar - Typified by table service, although there may be carry-away or "grab and go" components. Food is prepared to order and restaurants of this type often include a bar. Examples include T.G.I. Friday's, Carrabba's, Outback, Max & Ermas, Chili's, etc.

Specialty Coffee - These venues focus on coffee and may offer other beverages along with pastries, bakery items or other light food. The venue may have take away items such as sandwiches and bottled beverages. Includes Starbucks, Seattle's Best, Peet's Coffee or a local specialty coffee concept.

Total rent is defined as consideration received by the airport for the right to operate concessions at your airport, not including fees paid for parking, security badging, deliveries, marketing, supporting space, etc.

Airport/Proprietary Brand – Shop/store which only appears at airports.

Local/Regional Brand - A brand that is developed, distributed and promoted within a defined geographical area, usually found in more than one metropolitan market that appeals to, is recognized by, and meets the specific and unique needs of the population of a particular locale or region.

National/International Brand - A brand that is marketed and distributed nationally/internationally.

Carts/Kiosks - Any non in-line unit, including mobile and non-mobile facilities, stand-alone "grab 'n' go" units, etc.

Square Footage - Square footage for food and beverage and other concessions shall be the

leased premises excluding (a) common seating space and (b) public circulation area.

1. Using the above definitions, please select the airport's F&B concession model (check all that apply):

- Prime Operator
- Master Concessionaire
- Direct Leasing
- Developers/Managers
- Other - Write In

2. Using the above definitions, please provide the Total Gross Sales in U.S. dollars (whole numbers only) for the following categories. If the airport does not separate alcohol sales, please include in overall food sale and let us know by mentioning this in the comments box at the end of this survey) (whole numbers only):

	Fast Food/Quick Service	Food Sales from Sit Down/Casual/Bar	Alcohol Sales from Sit Down/Casual/Bar	Specialty Coffee	Other
CY2024	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

3. Please provide the Total Rent (MAG or percentage of fees) collected from F&B in U.S. dollars (whole numbers only):

	Fast Food/Quick Service	Sit Down/Casual/Bar	Specialty Coffee	Other
CY2024	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

4. How is the rent calculated for the F&B concession program?

- A fixed amount (e.g. MAG)
- A percentage of gross sales, please state the percentage range of gross sales in the box provided (e.g., between 5% and 7%)

- MAG or % gross sales, whichever is greater

- Other - Write In

5. Please provide the square footage of Landside, Airside, and Total area for the following categories (whole numbers only) for **CY2024** (if significant changes occurred during the year, please use the year-end number and add a comment in the comments box at the end of this survey):

	Fast Food/Quick Service	Sit Down/Casual/Bar	Specialty Coffee	Storage/Support Space	Other
Landside (Pre-Security)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Airside (Post - Security)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Total Square Footage	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

6. Please provide the total square footage of Remote Food and Beverage storage/support space (not in concourse/terminal, but on airport property) (whole numbers only):

CY2024

7. Please provide the average length of the existing concession agreements for the following categories (number of years):

Fast Food/Quick Service	<input type="text"/>
Sit Down/Casual/Bar	<input type="text"/>
Specialty Coffee	<input type="text"/>
Other	<input type="text"/>

8. Using the above definitions, please provide percentage distribution in terms of square footage for the following areas of airport F&B program (whole numbers only):

Percentage of Airport Brands/Proprietary Brands

Percentage of Local Brands/Regional Brands

Percentage of National Brands/International Brands

0 out of 100% Total

9. Are the airport tenants charged separately for storage/support space?

- Yes
- No

10. If airport tenants are charged separately for storage/support space, then what is the lease rate?

- Certain types of airline rental rate, recalculated annually
- Fixed rate specified in the concessions lease, with or without inflation adjustments
- Other - Write In (Required)

11. What is the current storage/support space rental amount per square foot?

12. Using the above definition, does the airport have F&B carts/kiosks?

- Yes
- No

Food and Beverage Carts/Kiosks

13. Please provide the Gross Sales for the F&B carts/kiosks program in U.S. dollars (whole numbers only):

CY2024

Planning, Operational and Customer Service

14. Please select how trash removal is handled for the airport F&B concessions locations (check all that apply):

- By airport
- By concessionaire
- By third party

15. If the airport levies a Common Area Maintenance charge on the food and beverage concessionaire(s), which of the following are included in that charge (check all that apply):

- Janitorial
- Lighting
- Repairs
- Refuse Removal
- Utilities

16. Do the F&B agreements include a mid-term refurbishment requirement?

- All agreements have mid-terms
- Some agreements have mid-terms
- No agreements have mid-terms

17. Please share any additional comments about your survey response in the comments box below.

Thank You!

Thank you for taking our survey. This is Part 2 of the 2025 ACI-NA Airport Concessions Benchmarking Survey.

Please respond to Part 1 (General Information) and Part 3 (Duty Free, News & Gift, Specialty Retail and Airport Lounges) of the survey to make sure we have a complete response from your airport.

Thank you and as always, we sincerely appreciate your participation. You will now receive a confirmation email.