

MIAMI INTERNATIONAL AIRPORT

SMP 2015-2050

KENDALL-TAMIAMI EXECUTIVE AIRPORT • OPA-LOCKA EXECUTIVE AIRPORT • HOMESTEAD GENERAL AVIATION AIRPORT • DADE-COLLIER TRAINING AND TRANSITION AIRPORT

STRATEGIC AIRPORT MASTER PLANNING STUDY

FOR MIAMI-DADE COUNTY'S SYSTEM OF AIRPORTS

MIA Neighborhood Relations Committee



MIAMI-DADE AVIATION DEPARTMENT

1. Strategic Master Plan (SMP) Background and Overview
2. MIA Activity Baseline Forecasts
3. Alternate Demand Scenarios
4. Advisory Panel Workshop



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STRATEGIC AIRPORT MASTER PLANNING STUDY

Background & Overview

Miami-Dade Strategic Airport Master Plan Study
(SMP 2015 – 2050)



The current Master Plan for MIA recommended several of the projects included in the ongoing CIP. The Master Plan was initiated in 1991 and adopted in 1994. It focused on airport needs for the 1990-2010 timeframe.

An Aviation System Plan Update was commissioned in 1996 but never adopted.

A Strategic Terminal Planning Study was requested by the BCC. The Study was initiated in 1995 and completed in 1997. It focused on airfield and terminal development strategies for the 2010-2040 timeframe.



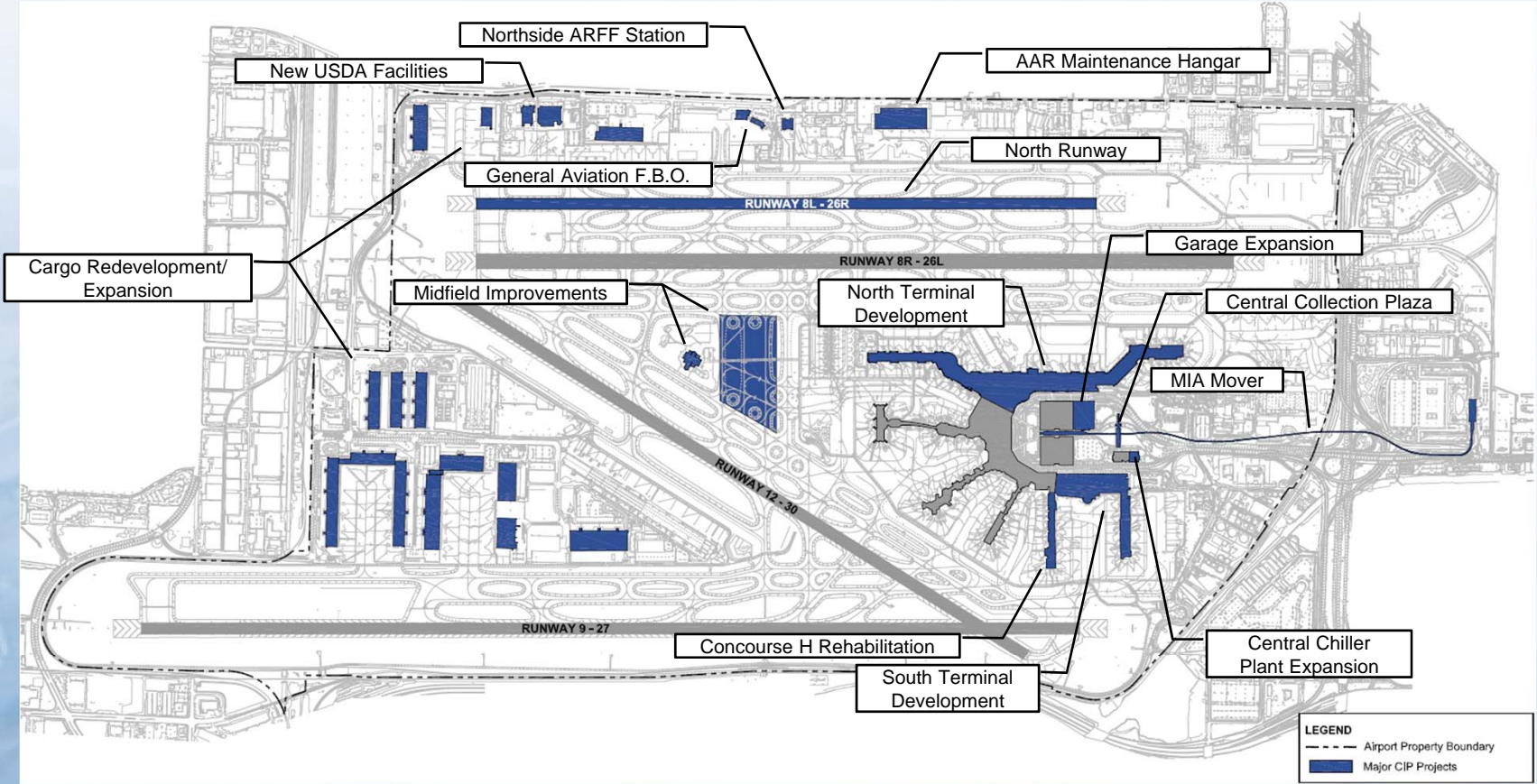
1994 Airport Master Plan: Major CIP Projects

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Capital Investments:



- Comprehensive evaluation of aviation facilities:
 - Airfield
 - Terminals
 - Vehicular parking & roadways
 - Tenant facilities (cargo, aircraft maintenance, etc.)
 - Support facilities (airport administration, fueling, fire rescue, etc.)
- Strategic plan for MIA and the County's system of GA airports:
 - Outlines long-term capital investment strategies
 - Planning horizon: 2015 through 2050
 - Considers multiple development scenarios

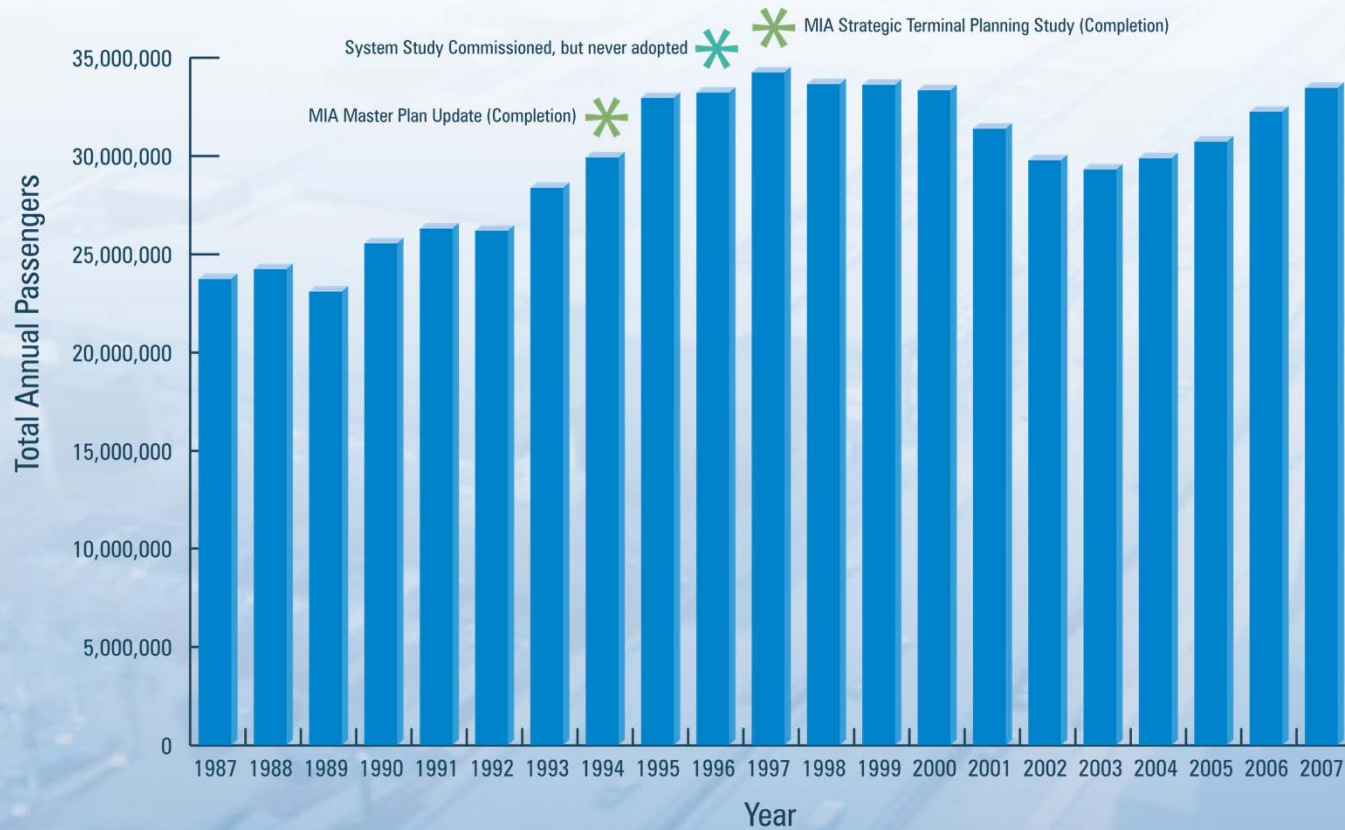


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Why now?

STRATEGIC AIRPORT MASTER PLANNING STUDY



Carrier with Highest Market Share



- Provide a structure and roadmap to guide long-term development and respond to air transportation needs in the region given a dynamic and uncertain industry and economic environment
- Preserve and enhance MIA's role as an international gateway
- Seek opportunities that continue to enhance customer service, as well as the efficient and timely movement of passengers and goods through the airport system
- Support growth in aviation and non-aeronautical services and revenues within the airport system



Planning Parameters/Considerations

STRATEGIC AIRPORT MASTER PLANNING STUDY

Key Drivers influencing the need to plan beyond the current CIP:

- Increasing / Changing Security Requirements (including but not limited to commercial passenger activity)
- Airline Operational Characteristics
 - Reduced Space Requirements
 - Self-service Driven
 - Reduced Staffing
- Increasing Aircraft Seat Capacities / Load Factors
- Soaring Fuel Prices and its effects on airline service patterns and market demand
- Airline Consolidation
- Near term factors influencing AA operations globally and at MIA
- Group VI Compatibility
- Third Party/Public-Private Partnership Opportunities
- Revenue Generating Opportunities
- Corporate aviation and Very Light Jet (VLJ) Aircraft
- Aligning and balancing land use needs with land use compatibility
- Complying with emerging changes in FAA design or safety standards
- Preparing for the next capacity “bottleneck” in Miami-Dade’s airport system
- Continued Operational Enhancements and customer service improvement supported by sound financial analysis and prudent business planning



PHASE 1A

Study Design
Stakeholder Surveys
Baseline Forecasting
Analysis

PHASE 1B

Initiation of MIA Master Plan:
Inventory/Data
Collection
Identification of
Immediate Needs

PHASE 2

MIA Master Plan:
Capacity Assessments
Airfield, Terminal and
Landside Simulation
Modeling

PHASE 3 - Ongoing

MIA Master Plan :
2035 Facility
Requirements
Market Assessment
Demand Scenario
Analysis
**General Aviation
Airports:**
Inventory, Forecasts and
Demand/Capacity
Assessments
**Initiation of Long-Range
Strategic Plan:**
Initial Airport Asset
Optimization Analysis

PHASE 4

**Long –Range Strategic
Plan:**
Strategic Positioning and
Demand Allocations
Strategies
Long-Range Airport
Concept Plans
**Implementation
Planning:**
CIP Programming
Preliminary Plan of
Finance
Airport Layout Plans Set
Environmental Screening;
Preliminary Financial
Feasibility Screening



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Baseline Activity Forecasts

Miami International Airport



- Prepared in Phase 1 of the SMP and finalized in early 2010
- Include forecasts of:
 - Passenger enplanements
 - Cargo tonnage
 - Aircraft operational demand levels
 - Aircraft fleet composition
 - General Aviation projections will be performed in Phase 4 of the SMP
- Purpose:
 - Evaluate existing facilities
 - Quantify future facility needs
 - Assess financial viability of recommendations
- Presented and accepted by Miami-Dade's Board of County Commissioners on October 5, 2010



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SMP Baseline Forecasts Miami International Airport

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	2009	2035	Average Annual Growth Rate
Enplaned Passengers	16,884,099	25.9 to 32.8 Million	1.6% to 2.6%
Cargo Tonnage (U.S. Tons)	1,699,219	4.0 to 4.8 Million	3.4% to 4.1%
Total Aircraft Operations	351,427	483,500 to 594,000	1.3% to 2.3%

Sources: Ricondo & Associates, Inc., February 2010; Report of the Traffic Engineers, July 2010.



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MIA Alternative Demand Scenarios



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Stakeholders and Partners

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Internal

Mayor
County Manager
Board of County Commissioners/
Airport and Tourism Committee
MDAD Divisions
MDAD Management Council

Airport Business Partners

Airlines
Commercial
Ground Transportation
Providers
Cargo and Airline Maintenance
Tenants
Corporate Aviation Users
Concessionaires
Other Tenants
Port of Miami/Cruise Ship
Industry

Customers

Passengers
Guests/Meeters/
Greeters/Well Wishers
Cargo Shippers

Regulatory Agencies

FAA
FDOT
DHS/TSA
EPA/DERM
U.S. Customs/Immigration/
Agriculture
Department of Health
and Human Services

Regional Partners

Adjacent Municipalities/Local
Governments
Business Leaders/Chamber of
Commerce
Economic Development
Groups/Agencies
Agencies/Commissions
Special Interest Groups/Pilars of
the Community
Community Councils



Potential Alternate Demand Scenarios

- Look at alternate market scenarios likely occurring by 2035/2050.
- Analyze for potential changes that could alter future demand volumes and patterns.

MIA Specific Demand Scenarios

1. Unrestricted U.S. – Cuba Travel
2. Increased Hubbing Activity
3. Decreased Hubbing Activity
4. Fragmentation of International Service
5. High International Growth
6. Regional Shift of South Florida Domestic O&D Demand

National Demand Scenarios

1. Airline Mergers
2. Oil and Aviation Fuel Price Elasticity
3. Increased Environmental Regulation

Cargo Demand Scenario

1. Accelerated recovery from recession
2. Increased Connectivity Between Latin America & Asia



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Workshop Information

STRATEGIC AIRPORT MASTER PLANNING STUDY

Advisory Panel Workshop

May 5th, 2011 – 8:30 am to 4:00 pm

MIA North Terminal – 4th Floor - Auditorium A

Please RSVP at RSVP@miamidadeairports-smp.com

Presentation and Other Resources Available on the SMP Website:

<http://www.miamidadeairports-smp.com>

