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 BASELINE ACTIVITY FORECASTS, DERIVATIVE DATA AND FLEET MIX PROJECTIONS – RESULTS SUMMARY ACCEPTANCE BRIEFING FOR THE AIRPORT AND SEAPORT COMMITTEE (ASC)







MIAMI-DADE AVIATION DEPARTMENT



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

Study Design Outline

STRATEGIC AIRPORT MASTER PLANNING STUDY

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Air Carrier Enplanements Forecasts

Air Carrier Annual Operations Forecasts

Derivative Forecasts

Cargo Tonnage Forecast

MIA Total Operations Forecast







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Background

STRATEGIC AIRPORT MASTER PLANNING STUDY

The current Master Plan for MIA resulted in the CIP currently underway. 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 and completed in 1998, but was 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.





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Background

STRATEGIC AIRPORT MASTER PLANNING STUDY

In late 2005, the need for a strategic airport master plan study, focusing primarily on MIA but also considering the complementing and reliever roles of the County's general aviation airports was identified. Pursuant to this identification of need, the following events transpired:

- May 2006 Notice to Professional Consultants was issued through the Office of Capital Improvements (OCI)
- September 2006 recommended Consultant was identified by OCI and the appointed Selection Committee
- March 2007 contract with the recommended Consultant was approved by the BCC
- September 2007 funding commitment from the FDOT for 50 percent of the study cost was secured
- July 2008 first Joint Participation Agreement (JPA) from the FDOT for funding the initial study phase was received







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Overview

STRATEGIC AIRPORT MASTER PLANNING STUDY

The Strategic Master Plan (SMP) will focus on the following:

- A strategic plan for MIA and the County's general aviation system of airports, focusing on airport roles and positioning to capture existing or anticipated opportunities in the market
- Identify and assess strategies for responding to the needs of MIA from 2015 through 2050, while also providing guidance to address the immediate needs within the 2010-2014 time frame
- Positioning the County's airport system to serve:
 - Projected growth in demand
 - Airline service and industry trends
 - Continued enhancements in customer service
- Balancing capital expenditures for asset expansion and modernization needs within the County's financial framework and meeting performance targets





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Desired Study Outcomes

STRATEGIC AIRPORT MASTER PLANNING STUDY

The Strategic Master Plan (SMP) will produce the following:

- A Strategic Plan for MIA and the General Aviation Airports that considers various demand and growth scenarios through the 2050 timeframe. The Strategic Plan will outline airport roles and present concept plans for the airport system that represent long-range options for the optimization of each airport
- A Master Plan and ALP Update for MIA that outlines facility or operational needs and responsive solutions for the planning horizon (defined by the 2015-2035 timeframe) based on the activity forecasts and alternate demand scenarios considered
- Revisions (if necessary) to the recently approved Airport Layout Plans for the general aviation airports to reflect facility or operational improvements that may be needed within the planning horizon





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Study Approach

STRATEGIC AIRPORT MASTER PLANNING STUDY

Baseline forecasts form the basis for analyses undertaken in Phases 2, 3 and 4.

Multi-phase approach aligning with FDOT funding disbursements:

PHASE 1A

Study Design

Stakeholder Surveys

Baseline Forecasting Analysis

PHASE 1B

Initiation of MIA Master Plan Update

Inventory/Data Collection Identification of Immediate Needs

Market Assessment

Demand Scenario Analysis

PHASE 2

MIA Master Plan Update:

Capacity Assessment

Identification of Facility and Operational Needs

Non-airline revenue sources

Initiation of Long-Range Strategic Plan:

Initial Airport Asset Optimization Analysis

PHASE 3

MIA Master Plan Update:

Airport and System Improvement Alternatives

Environmental Screening; Preliminary Financial Feasibility Screening

Long-Range Strategic Plan:

Strategic Positioning and Demand Allocation Strategies

Long-Range Airport Concept Plans

PHASE 4

Implementation Planning

CIP Programming Preliminary Plan of Finance Airport Layout Plans Set







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Goals (preliminary)

STRATEGIC AIRPORT MASTER PLANNING STUDY

Provide a structure as well as policy and decision process 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







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Historical Traffic in South Florida and Recessions/Events History

STRATEGIC AIRPORT MASTER PLANNING STUDY



Sources: MDAD, November 2010; FLL Website, June 2010; PBI Website. June 2010; PBI 1989 Master Plan; FAA Terminal Area Forecast, December 2009. Prepared by: Ricondo & Associates, Inc., June 2010.





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Historical Traffic in the U.S. and Recessions/Events History

STRATEGIC AIRPORT MASTER PLANNING STUDY



Sources: MDAD, November 2010; FDOT Website, Data and Forecast, June 2010; Air Transport Association and U.S. DOT for National Statistics, June 2010. Prepared by: Ricondo & Associates, Inc., June 2010.





Summary of SMP Air Carrier Enplanements (Departing Passengers) Forecast

STRATEGIC AIRPORT MASTER PLANNING STUDY



	Originating onare	Connecting Share			Domestic Share
Existing	56%	44%	111 30 111	Existing	53%
2035 Projection	51%	49%		2035 Projection	50%
	1 march 19	must fill			

Notes : * AAGR stands for Average Annual Growth Rate.

MEP stands for Millions Enplaned Passengers and MAP for Million Annual Passengers (departing and arriving) Sources: Ricondo & Associates, Inc., February 2010; FAA TAF FY2009 for MIA, published on December 2009; Report of the Traffic Engineers, DRAFT June 2010.





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40,000,000

50%



*********** 500,000 400,000 **Annual Passenger Aircraft Operations** 300,000 200,000 Historical Operations 100,000 • SMP Baseline Forecast - Low - AAGR*: 1.3% •••• SMP Baseline Forecast - High - AAGR*: 2.3% 0 2015 2017 2001 2003 2005 2007 2009 2011 2013 2019 2021 2023 2025 2027 2029 2031 2033 2035 **Fiscal Year**

111	Domestic Share	International Share	
Existing	42%	58%	
2035 Projection	41%	59%	

Note *: AAGR stands for Average Annual Growth Rate.

FAA FY2009 Terminal Area Forecast is not presented as it does not provide operations forecast for passenger aircraft specifically. Source: Ricondo & Associates, Inc., February 2010.





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600,000

Summary of SMP Air Carrier Peak Month Average Day Operations Forecast

STRATEGIC AIRPORT MASTER PLANNING STUDY



Note *: AAGR stands for Average Annual Growth Rate. Source: Ricondo & Associates, Inc., February 2010.





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Summary of SMP Air Carrier Fleet Mix Assumptions

STRATEGIC AIRPORT MASTER PLANNING STUDY





Total Cargo Tonnage in U.S. Tons

6,000,000

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Comparative Cargo Tonnage Forecasts (in U.S. Tons)

STRATEGIC AIRPORT MASTER PLANNING STUDY



Company; Ricondo & Associates, Inc., February 2010.





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Summary of SMP TOTAL Annual Aircraft Operations Forecast

STRATEGIC AIRPORT MASTER PLANNING STUDY



Fiscal Year

Note: Includes a flat general aviation forecasts based on the January 2010 DRAFT until an actual forecast is provided by the SMP during Phase 3..

Sources: Webber Air Cargo, March 2010; FAA TAF for MIA, January 2010; Ricondo & Associates, Inc., February 2010.



