

MIAMI INTERNATIONAL AIRPORT

SMP 2015-2050

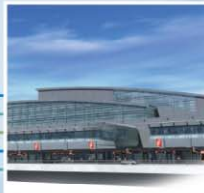
KENDALL-TAMIAMI EXECUTIVE AIRPORT • OPA-LOCKA EXECUTIVE AIRPORT • HOMESTEAD GENERAL AVIATION AIRPORT • DADE-COLLIER TRAINING AND TRANSITION AIRPORT

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 REPORT FOR THE BOARD OF COUNTY
COMMISSIONERS

OCTOBER 5, 2010



Study Design Outline

STRATEGIC AIRPORT MASTER PLANNING STUDY

Background

Overview

Desired Study Outcomes

Study Approach

Goals (preliminary)

Recession History

Air Carrier Enplanements Forecasts

Air Carrier Annual Operations Forecasts

Derivative Forecasts

Cargo Tonnage Forecast

MIA Total Operations Forecast



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.



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



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



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



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



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

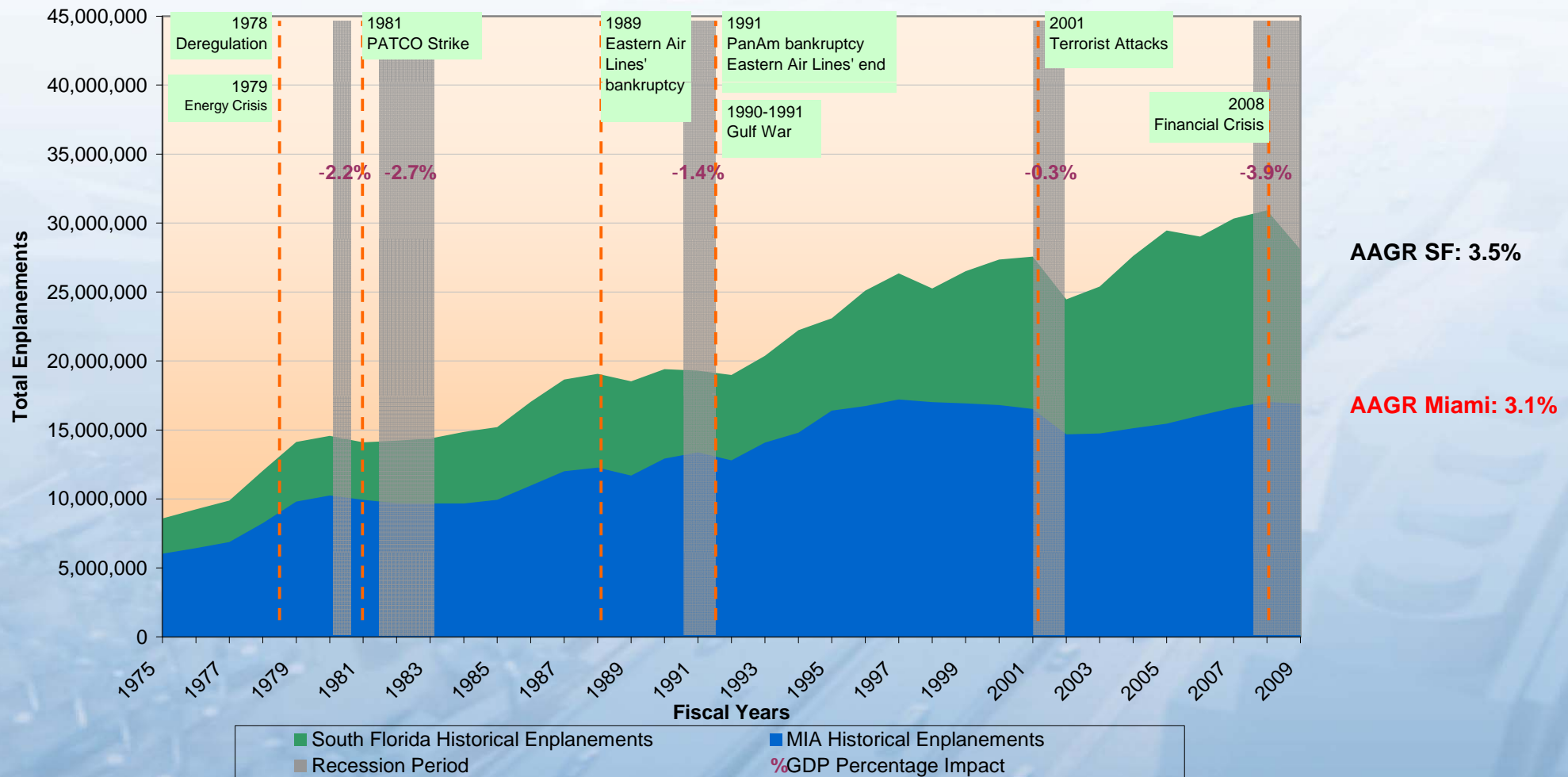
Seek opportunities that continue to enhance customer service, as well as the efficient and timely movement of passengers and goods through the airport system

Support growth in aviation and non-aeronautical services and revenues within the airport system



Historical Traffic in South Florida and Recessions/Events History

STRATEGIC AIRPORT MASTER PLANNING STUDY



Notes: 1) South Florida includes FLL, PBI and MIA. 2) AAGR stands for Average Annual Growth Rate.

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.

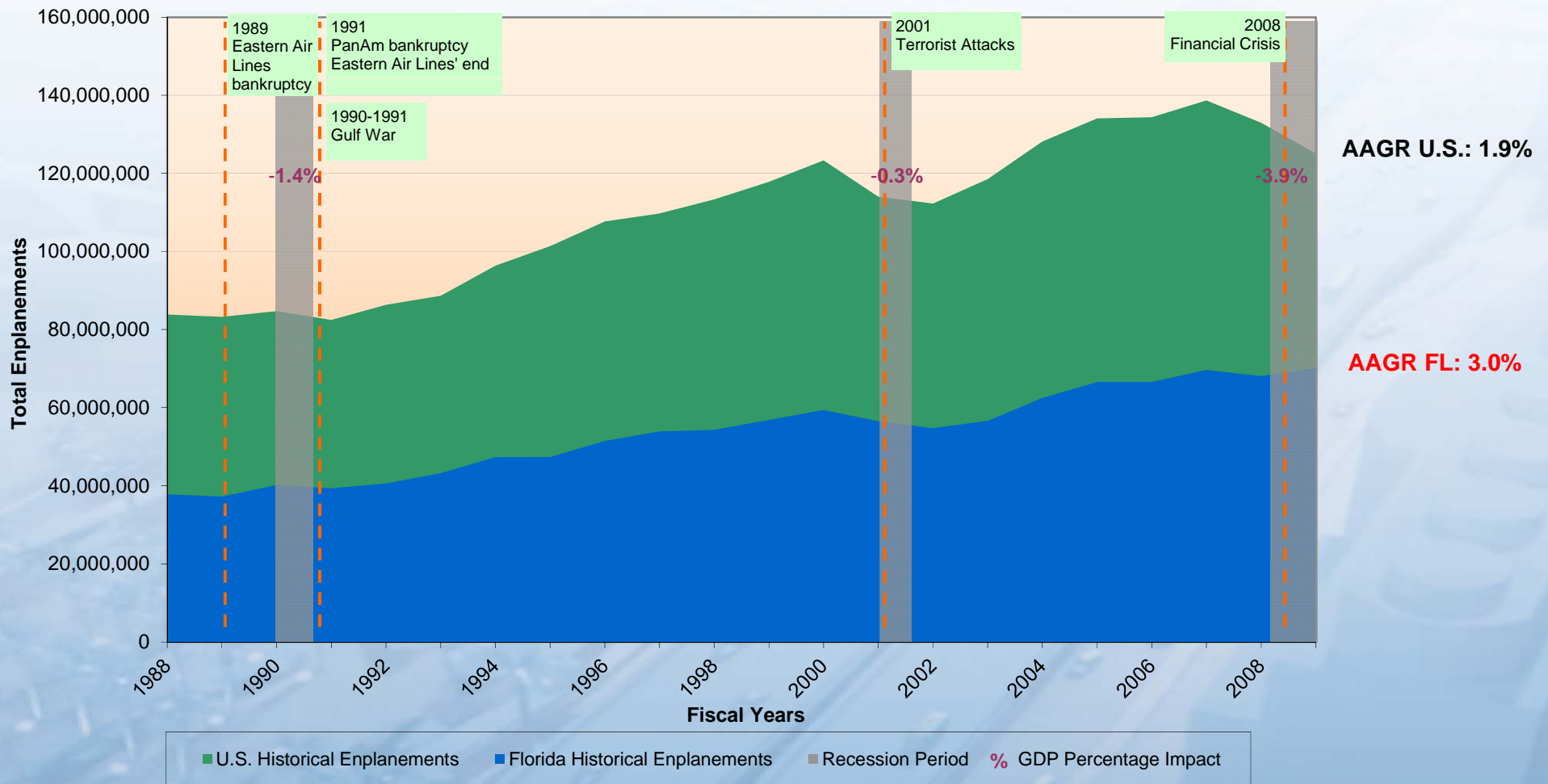


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Historical Traffic in the U.S. and Recessions/Events History

STRATEGIC AIRPORT MASTER PLANNING STUDY



Note: 1) U.S. Historical Enplanements shown represent one fifth of total revenue enplanements for graphical purposes.

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.

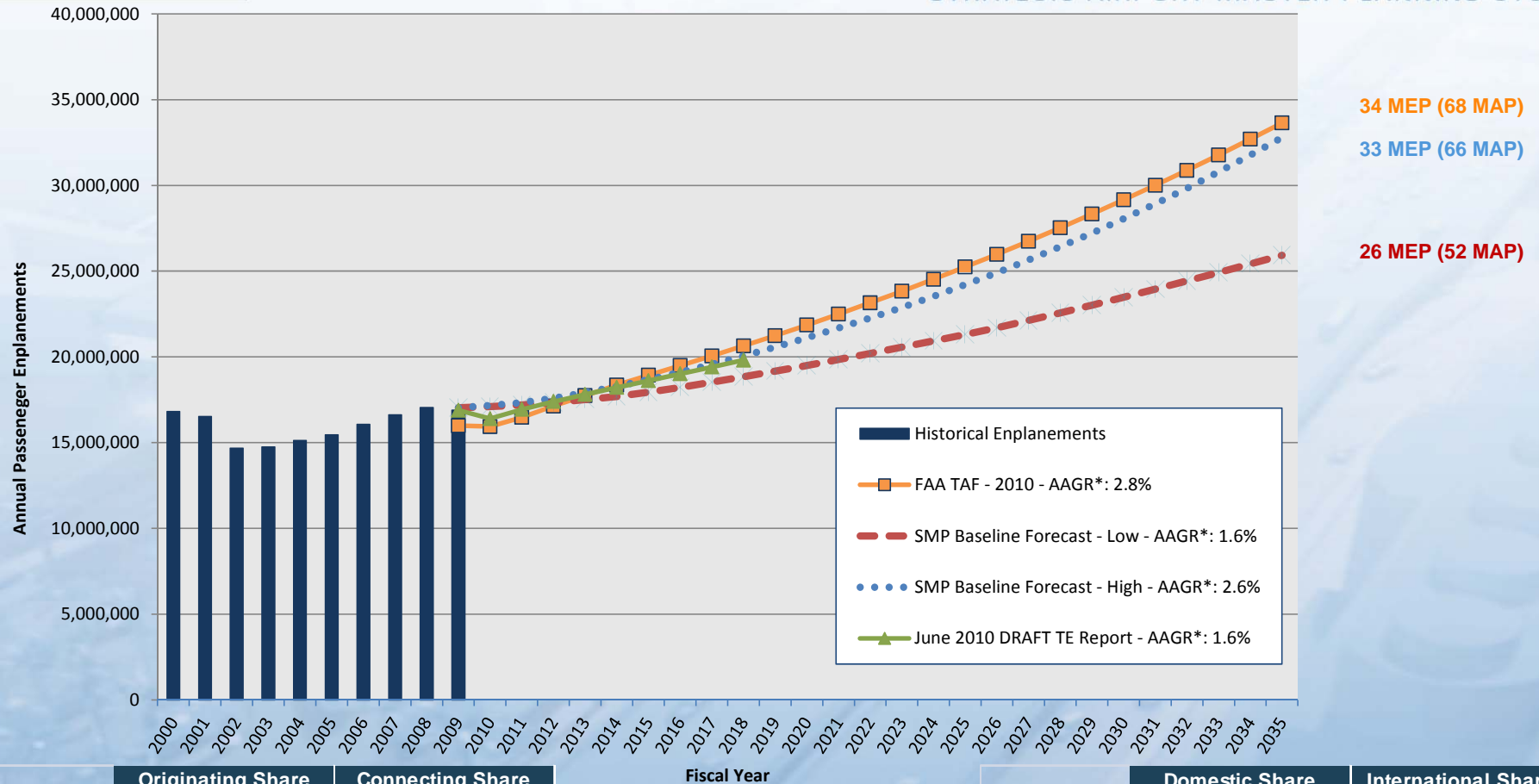


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Summary of SMP Air Carrier Enplanements (Departing Passengers) Forecast

STRATEGIC AIRPORT MASTER PLANNING STUDY



	Originating Share	Connecting Share
Existing	56%	44%
2035 Projection	51%	49%

	Domestic Share	International Share
Existing	53%	47%
2035 Projection	50%	50%

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.

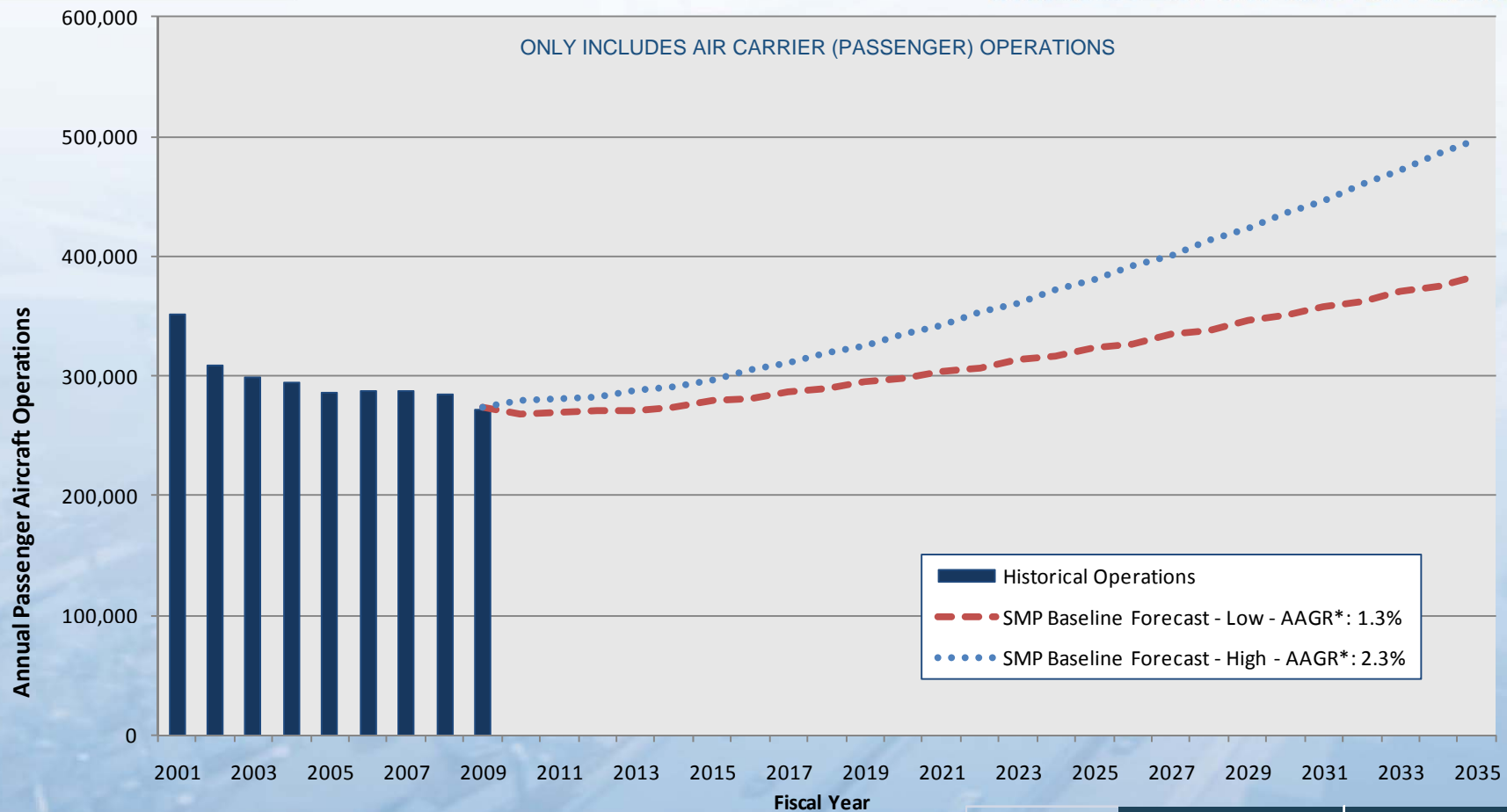


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Summary of SMP Air Carrier Annual Operations Forecast

STRATEGIC AIRPORT MASTER PLANNING STUDY



Notes *: 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.

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

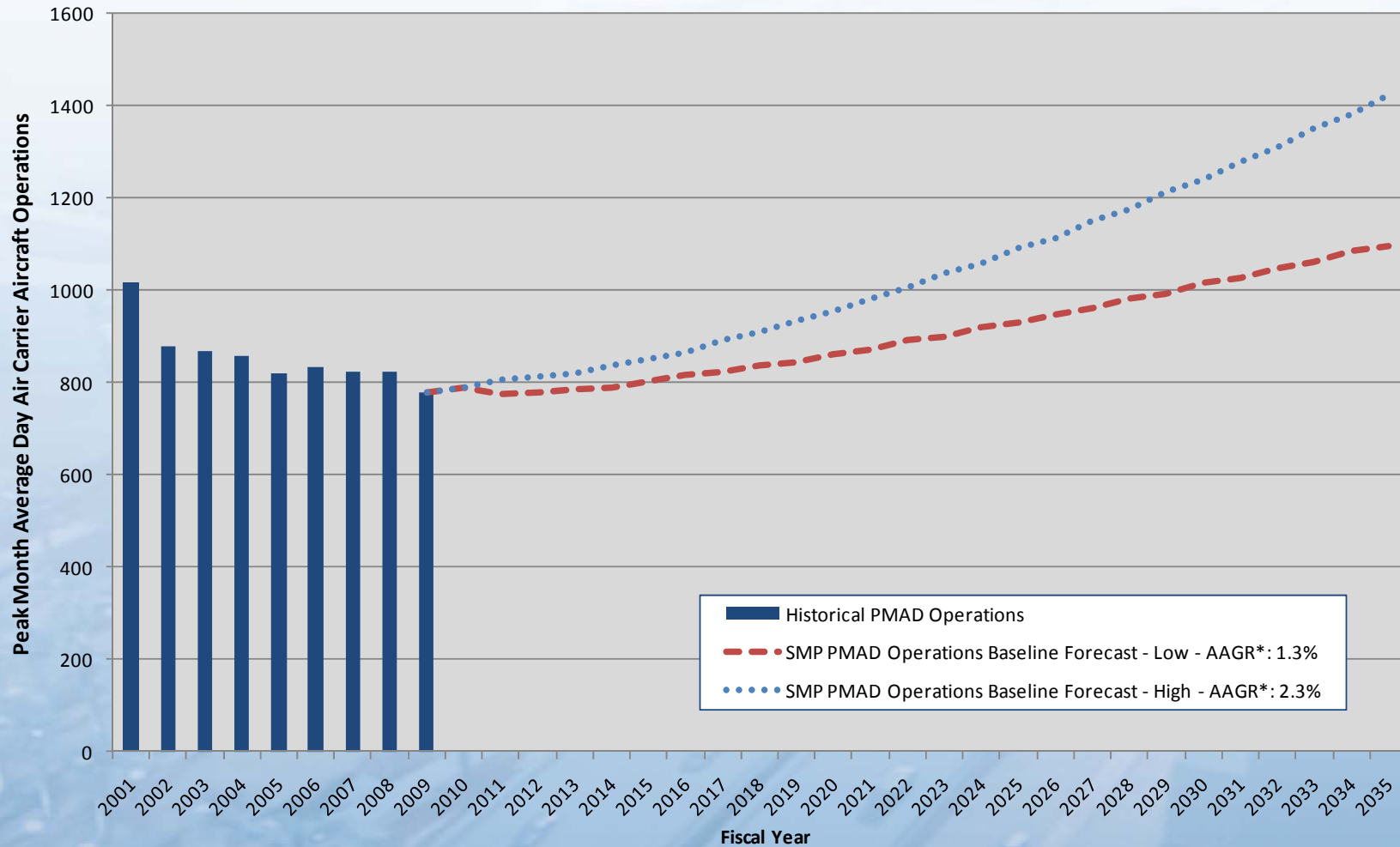


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Summary of SMP Air Carrier Peak Month Average Day Operations Forecast

STRATEGIC AIRPORT MASTER PLANNING STUDY



Note *: AAGR stands for Average Annual Growth Rate.

Source: Ricondo & Associates, Inc., February 2010.

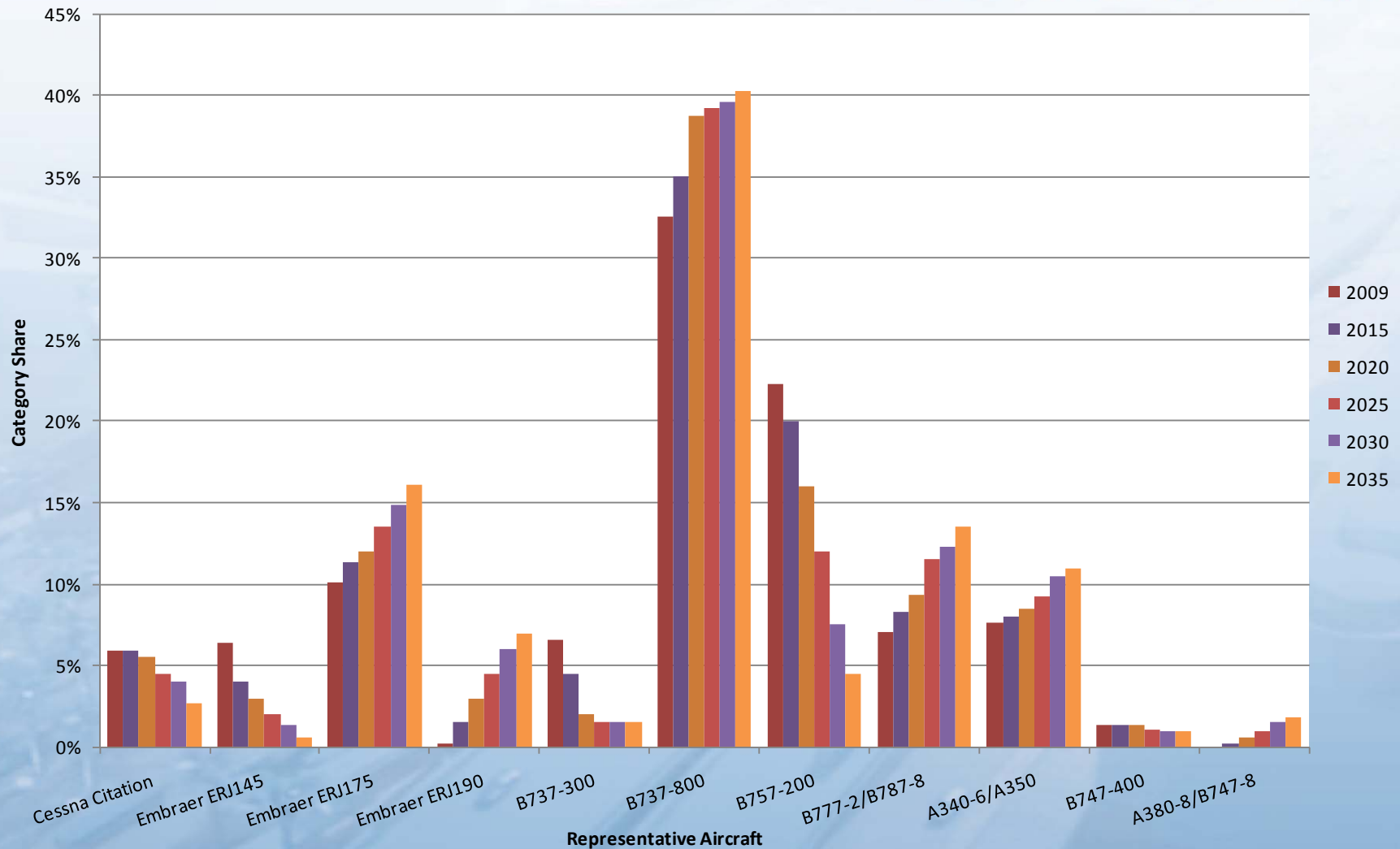


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Summary of SMP Air Carrier Fleet Mix Assumptions

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Source: Ricondo & Associates, Inc., February 2010.

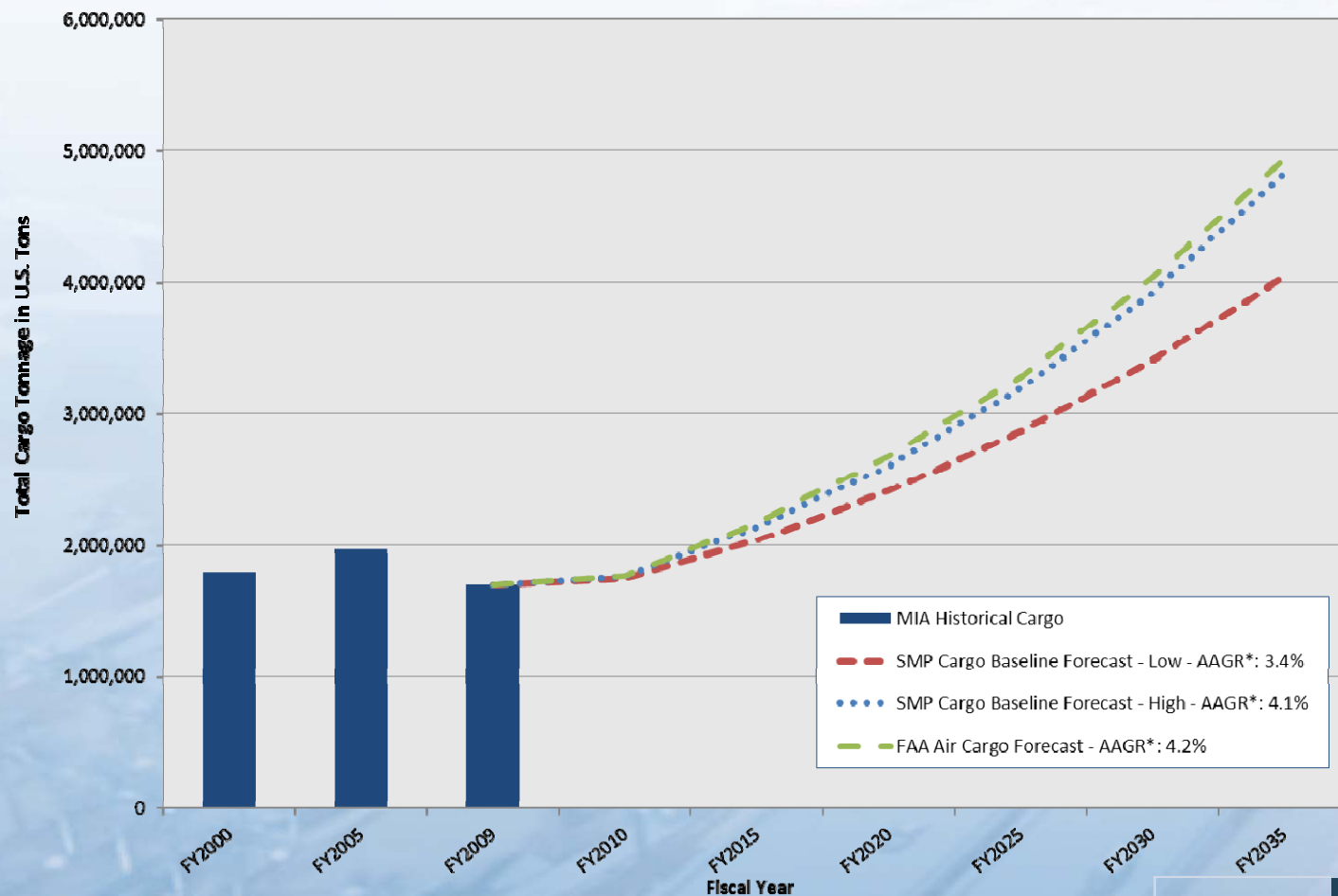


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Comparative Cargo Tonnage Forecasts (in U.S. Tons)

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	Boeing 2008-2027	
North America	To	From
North America (Intra)	2.70%	
Asia	6.70%	6.60%
PRC (China)	8.20%	8.80%
Europe	4.90%	5.40%
South America		
North America	5.70%	6.00%
Europe	6.10%	5.80%
Central America		
North America	5.80%	5.60%
Europe	4.70%	5.70%
Caribbean		
North America	1.20%	1.80%
Europe	3.70%	2.80%

Percentages shown represent AAGR.

Note *: AAGR stands for Average Annual Growth Rate.

Sources: Webber Air Cargo, March 2010; FAA Aerospace Forecast FY2009-2025; World Air Cargo Forecast 2008-2009, The Boeing Company; Ricondo & Associates, Inc., February 2010.

	Domestic Share	International Share
Existing	13%	87%
2035 Projection	8%	92%

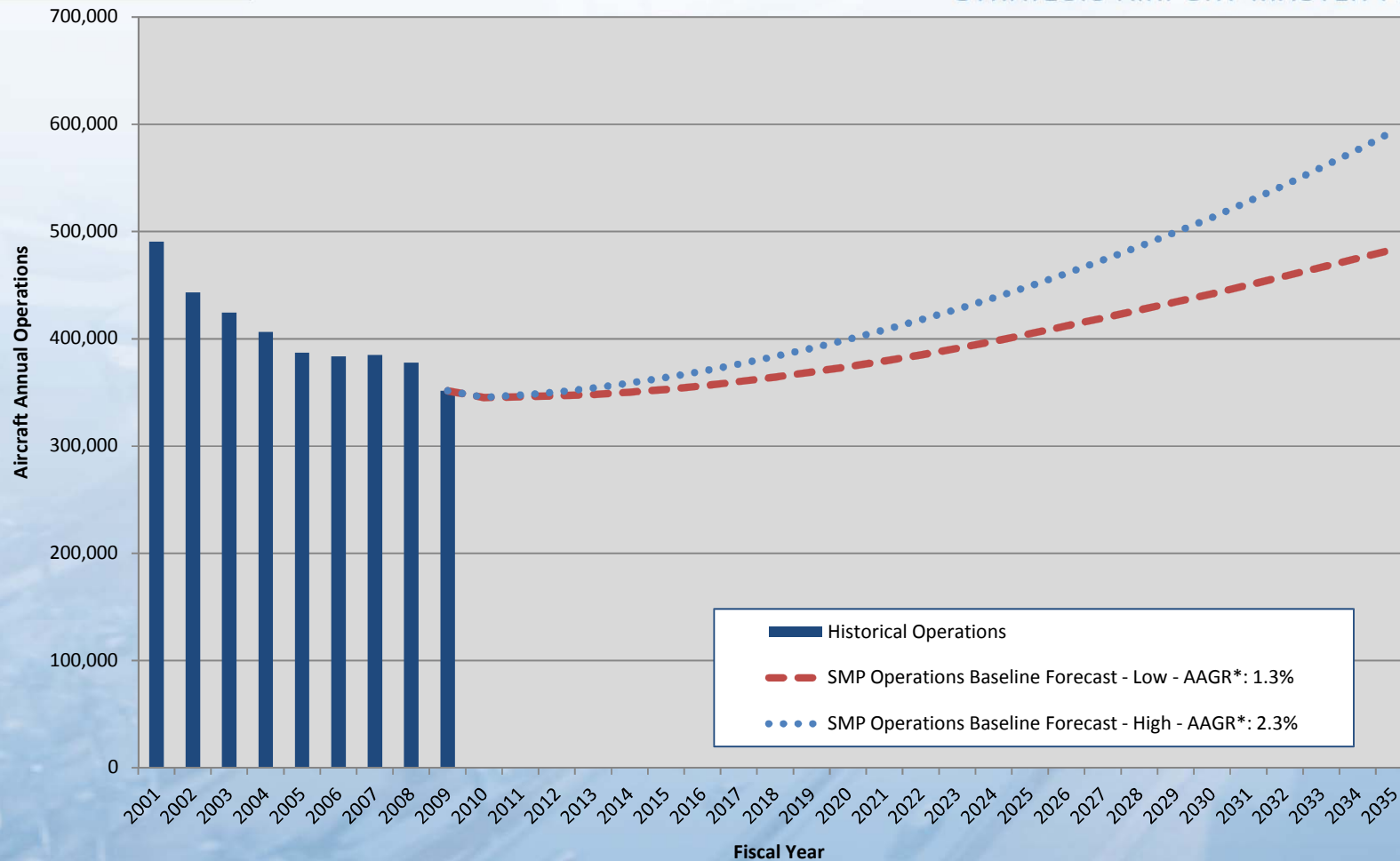


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Summary of SMP TOTAL Annual Aircraft Operations Forecast

STRATEGIC AIRPORT MASTER PLANNING STUDY



Note: Includes a flat general aviation forecast 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.

