

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

Alternative Demand Scenarios
Advisory Panel Workshop



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



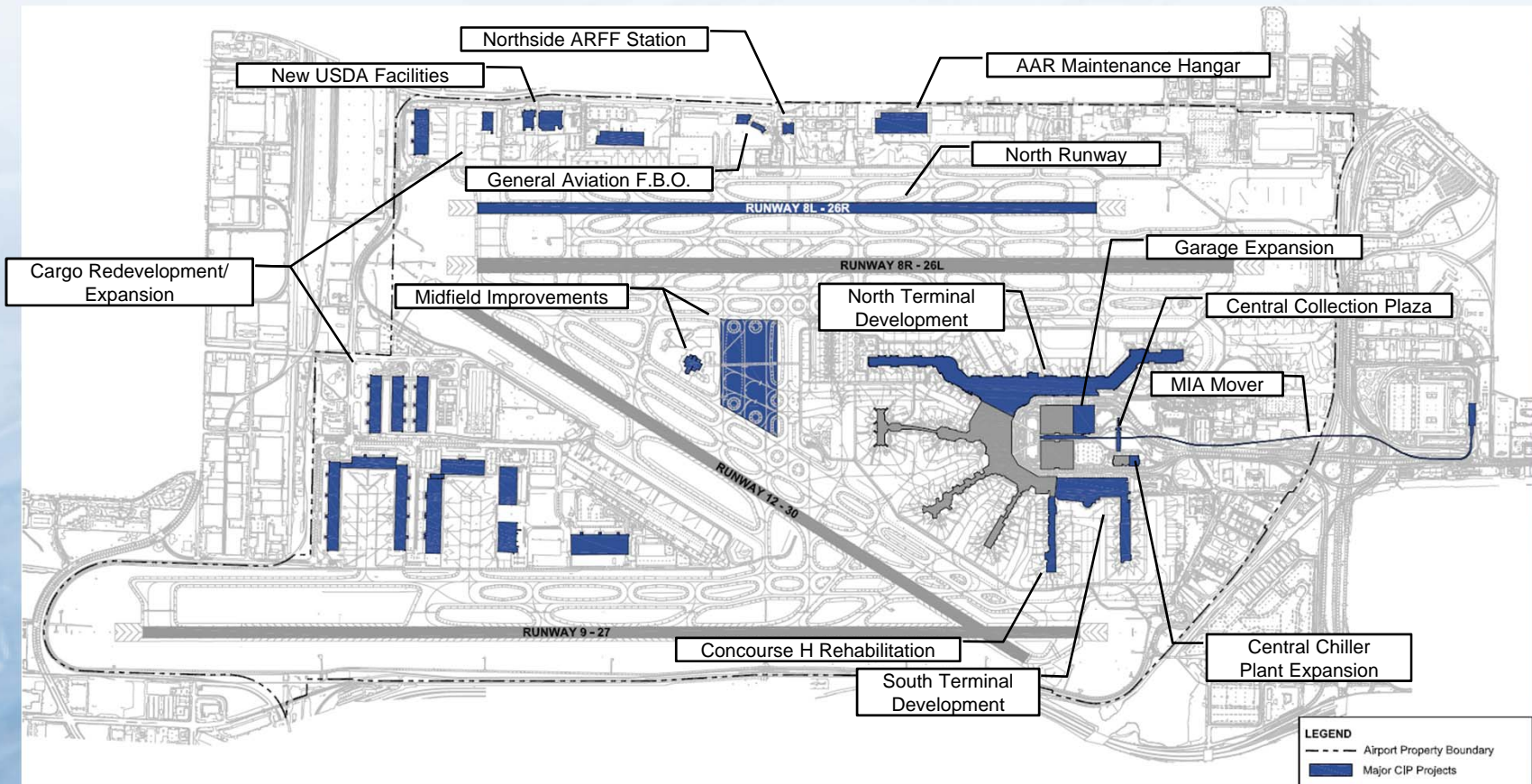
1994 Airport Master Plan: Major CIP Projects

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Capital Investments:



- 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
- Comprehensive evaluation of aviation facilities:
 - Airfield
 - Terminals
 - Vehicular parking & roadways
 - Tenant facilities (cargo, aircraft maintenance, etc.)
 - Support facilities (airport administration, fueling, fire rescue, etc.)



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SMP Study Approach

STRATEGIC AIRPORT MASTER PLANNING STUDY

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



- 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

STRATEGIC AIRPORT MASTER PLANNING STUDY

	2009	2035	Average Annual Growth Rate
Enplaned Passengers	16,884,099	25.9 to 32.8 Million	1.6% to 2.6%
Cargo Tonnage	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.



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



Advisory Panel Workshop Preliminary Agenda

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8:30 – 9:00 a.m.	<i>Registration</i>
9:00 – 10:45 a.m.	Presentation of Alternate Demand Scenarios
10:45 – 11:00 a.m.	<i>Break</i>
11:00 – 12:00 p.m.	Small Group Session 1
12:00 – 1:00 p.m.	<i>Lunch (provided)</i>
1:00 – 2:45 p.m.	Small Group Session 2
2:45 – 3:00 p.m.	<i>Break</i>
3:00 – 3:45 p.m.	Prioritization of Alternate Demand Scenarios
3:45 – 4:00 p.m.	Review Results



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Workshop Information

STRATEGIC AIRPORT MASTER PLANNING STUDY

Advisory Panel Workshop

May 5th, 2011 – 8:30 am to 4:30 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>

