Agenda

• Master Plan Process
  – Introduction
  – Goals and Objectives
  – Sequence of Study Tasks; Key Questions Addressed by the Master Planning Process

• Baseline Conditions / Today’s Environment
• Aviation Activity Forecasts
• Capacity & Operational Conditions
  – Airfield
  – Gates & Terminal Facilities
  – Landside

• Short-Term Improvements
  – Landside
  – Terminal
• Master Plan Concepts for Serving Demand through 2035
  – Terminal
  – Landside

• Next Steps
  – Stakeholder Engagement and Public Outreach
Master Plan Process

Introduction, Goals, and Sequence of Study Tasks
Introduction

• “An airport master plan is a comprehensive study of an airport and usually describes the short-, medium-, and long-term development plans to meet future aviation demand.” – FAA Advisory Circular 150/5070 – 6B Airport Master Plans

• Plans focus on addressing long-term (20+ years) needs by establishing a roadmap for incremental development to meet future demand

• Planning methods vary depending on the size and complexity of the airport but include the following key elements: inventory of existing conditions forecasting, demand/capacity, alternatives, environmental/sustainability and financial

• Other considerations may include the highest and best use of existing infrastructure given long term development plans
FLL Master Plan Goals and Objectives

- **BALANCE** – Airfield/Terminal/Landside/Airspace
- **RESPOND** – to Immediate and Near Term Needs
- **POSITION** – for Future Growth and New Opportunities
- **ENHANCE** – Customer Experience and Connectivity
- **OPTIMIZE** – Land Assets and Recent Investments
- **PRESERVE** – FLL’s Identity and Strengths

- Broward County’s Asset
- Economic Engine
- Easy In, Easy Out
- Low Cost, High Efficiency
Master Planning Goal:
Landside/Terminal/Gates/Airfield & Airspace Balance

Representative Airport Layout

LANDSIDE  TERMINAL  GATES  AIRFIELD

AIRSPACE (FAA Controlled)
Sequence of Master Planning Tasks

INVENTORY COMPLETE

MARKET ASSESSMENT

FORECASTS COMPLETE

DEMAND/CAPACITY & REQUIREMENTS FAA APPROVAL MAY 2017 – JUNE 2017

ENVIRONMENTAL & SUSTAINABILITY DEC 2017 – JAN 2018

CAPITAL IMPROVEMENT PROGRAM DEC 2017 – JAN 2018

FINANCIAL FEASIBILITY MAY 2018 – JUNE 2018

ALTERNATIVES ANALYSIS JULY 2017 – AUG 2017

AIRPORT LAYOUT PLAN & AIRPORT GIS JUNE 2018 – SEP 2018

FINAL REPORT FAA APPROVAL SEPT 2018 – DEC 2018

What are FLL’s current facilities and infrastructure assets? What are the existing conditions?

What is the projected future growth for FLL’s traffic and activity levels?

How much capacity does FLL have? Are there capacity gaps in the future?

How should the capacity gaps be addressed?

What is the market potential for parcels not needed for aviation purposes?

Environmental implications of the proposed improvements?

What projects are needed to fulfill FLL’s future needs?

Is the proposed Capital Improvement Program affordable?

What is the future vision for FLL based on the Master Plan recommendations?

Successful Completion of the Master Planning Process

PUBLIC INVOLVEMENT

FAA APPROVAL January 13, 2017

TBD
Baseline Conditions / Today’s Environment

Baseline Conditions assume completion of the current Capital Improvement Program between now and early 2020
FLL Baseline Conditions – Land Assets & General Uses

- General Aviation / Cargo / Support Facilities
- Co-Owned Parcel with PEV
- Terminal Area as defined in Environmental Impact Statement for the new South Runway (December - 2008)
- General Aviation & Business Aviation Development Area
- New Employee Parking Lot (former Economy Lot)

Legend:
- Airport Owned Property with limited/restricted development opportunity
- On-Airport Parcels serving Aviation Uses
- Co-Owned Airport Parcel with Development Opportunity
- New Employee Parking Lot (Former Economy Lot)
- Parcels subject to sale or transfer per interlocal agreements
FLL Baseline Conditions - Terminal Area

- **T1**
  - Original Construction 2001 - 2003
  - Expansion - Concourse A June 2017; B/C Connector August 2017

- **T2**
  - Original Construction 1986
  - Modernization est. completion of 2020

- **T3**
  - Original Construction 1986
  - Modernization est. completion of 2019

- **T4**
  - Original Construction 1983
  - Expansion - est. completion 4Q2018

- **CYPRESS GARAGE**
  - Rental Car Center & Public Parking
  - Opened 2005

- **HIBISCUS GARAGE**
  - Opened 1998

- **PALM GARAGE**
  - Opened 1985

- **Under Development**
FLL Baseline Conditions – Airfield Improvements

Baseline Conditions assume:

1) Runway 10L-28R improvements included as part of the North Airfield Pavement Geometry Evaluation

North Airfield Geometry Improvements

Midfield Taxiway Area

South Runway

Runway 10L-28R Temporary Closure / Rehabilitation (3QCY19)

Pavement to be Removed
FLL Baseline Conditions
Passenger Growth FY11 – FY16

NOTES: Data represents total passengers (enplaned & deplaned) at the U.S. Large Hub Airports.

SOURCES: Broward County Aviation Department; US DOT T100; Ricondo & Associates, Inc.
FLL Baseline Conditions
Growth Since Completion of South Runway Program (Sept. 2014)

<table>
<thead>
<tr>
<th>Fiscal Year</th>
<th>Total Passengers</th>
<th>Total Operations</th>
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<tbody>
<tr>
<td>Fiscal Year 2015</td>
<td>FLL 10%</td>
<td>8%</td>
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<tr>
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<td>Combined Average Growth of All other Large Hubs 4.5%</td>
<td>0.5%</td>
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<tr>
<td>Fiscal Year 2016</td>
<td>FLL 9%</td>
<td>5%</td>
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<tr>
<td></td>
<td>Combined Average Growth of All other Large Hubs 4.3%</td>
<td>1.6%</td>
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Fiscal Year (FY) represents October 1st – September 30th
Aviation Activity Forecasts

Approved by FAA: January 13, 2017
Activity Forecasts
Projected Growth – FY2016 - 2035

Per 2016 FAA Terminal Area Forecasts (TAF); growth is dependent upon available facilities

NOTES: Data represents revenue enplaned passengers at U.S. Large Hub Airports and is sorted (largest to smallest) based on compound annual growth rates for the period noted. The top 10 airports (as well as MIA and TPA) are shown.

SOURCES: Federal Aviation Administration, 2016 Terminal Area Forecast, Published January 2017; Ricondo & Associates, Inc.
Activity Forecasts – Enplaned Passengers
Baseline, Accelerated Baseline, and FAA 2016 TAF

NOTE: Accelerated growth is dependent upon available facilities (specifically gates).

<table>
<thead>
<tr>
<th>Year</th>
<th>Historical</th>
<th>2017 - Projected</th>
<th>Accelerated</th>
<th>Baseline</th>
<th>FAA 2016 TAF</th>
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<tr>
<td>2035</td>
<td>60.0m</td>
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**NOTES:**
- **CAGR** = Compound Annual Growth Rate.
- Total passengers equals two times enplaned passengers. FY 2017 is based on four months of actual data and eight months of projected data.
- Baseline forecasts estimate future airport activity predominantly based on trend analysis of historical activity, consideration of FLL’s existing share of South Florida’s demand for air service, socioeconomic data, and local/national trends.
- The Accelerated Baseline forecasts reflect higher growth at the Airport, particularly in the short-term based on discussions with several airlines operating at FLL regarding their growth plans, and the potential for FLL securing a larger share of South Florida’s demand for air service.

**SOURCES:**
- Broward County Aviation Department (Historical); US DOT T100; Innovata; FAA Terminal Area Forecasts; Ricondo & Associates, Inc.
Activity Forecasts – Changing Passenger Demographic

Domestic vs. International

<table>
<thead>
<tr>
<th>Year</th>
<th>Domestic</th>
<th>International</th>
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<tbody>
<tr>
<td>2015 - Actual</td>
<td>80%</td>
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<td>2020</td>
<td>73%</td>
<td>27%</td>
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<tr>
<td>2025</td>
<td>72%</td>
<td>28%</td>
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</table>

Originating vs. Connecting

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<tr>
<th>Year</th>
<th>O&amp;D</th>
<th>Connecting</th>
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</thead>
<tbody>
<tr>
<td>2015 - Actual</td>
<td>90%</td>
<td>10%</td>
</tr>
<tr>
<td>2020</td>
<td>82%</td>
<td>18%</td>
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<tr>
<td>2025</td>
<td>81%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Note: Percentages for 2015 represent actual data.

Sources: Broward County Aviation Department (historical); Innovata; US DOT O&D Survey (DB1B); Ricondo & Associates, Inc.
Activity Forecasts

Aircraft Operations - As Approved by FAA on January 13, 2017

An operation is defined as either an aircraft takeoff or landing

Potential for Constrained Operations Resulting from North Runway Rehabilitation Project

Baseline forecasts estimate future airport activity predominantly based on trend analysis of historical activity, consideration of FLL’s existing share of South Florida’s demand for air service, socioeconomic data, and local/national trends.

The Accelerated Baseline forecasts reflect higher growth at the Airport, particularly in the short-term based on discussions with several airlines operating at FLL regarding their growth plans, and the potential for FLL securing a larger share of South Florida’s demand for air service.

SOURCES: Broward County Aviation Department (historical); Innovata; FAA Air Traffic Activity Systems; FAA Terminal Area Forecasts; Ricondo & Associates, Inc.

NOTES: CAGR = Compound Annual Growth Rate. FY 2017 is based on four months of actual data and eight months of projected data.

Baseline forecasts:
- 2015: 274.8k (Actual)
- 2017 - Projected: 307.3k
- Baseline: 400.3k
- 2016 TAF: 421.8k
- FAA TAF: 432.6k
- Accelerated: 432.6k

FY 2017 CAGR: 2.3%
FY 2016 TAF CAGR: 2.2%
Baseline CAGR: 1.9%
Capacity & Operational Conditions

Airfield, Terminal and Landside Systems
Airfield
FLL operates on a very small footprint compared to other large hubs

- **DEN**, 33,920 acres, 566,035 operations, 17 operations per acre
- **DFW**, 18,076 acres, 676,890 operations, 37 operations per acre
- **IAH**, 10,000 acres, 479,778 operations, 48 operations per acre
- **ORD**, 7,700 acres, 872,332 operations, 113 operations per acre
- **ATL**, 4,700 acres, 899,040 operations, 191 operations per acre
- **LAX**, 3,586 acres, 685,889 operations, 191 operations per acre
- **LAS**, 2,853 acres, 532,979 operations, 187 operations per acre
- **FLL**, 1,400 acres, 287,264 operations, 205 operations per acre

**Sources:** FAA Air Traffic Activity System (ATADS), FFY2016 Operations Data
Airfield Capacity Review

Future Demand
10-year baseline demand (Projected 2025 per forecast):
- 347,000 annual operations

20-year baseline demand (Projected 2035 per forecast):
- 400,000 annual operations

- An airfield is considered to be reaching its capacity when the average annual delay per operation reaches 6-10 minutes

Annual Airfield Capacity: 425,000 – 475,000 operations
(Average delay per operation = 6 – 10 minutes)

<table>
<thead>
<tr>
<th>FLL</th>
<th>Other Florida Airports</th>
</tr>
</thead>
<tbody>
<tr>
<td>CY2016 (Operations)</td>
<td>MIA (CY16)</td>
</tr>
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<td>290,239</td>
<td>414,234</td>
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</table>

An operation is defined as either an aircraft takeoff or landing
Gates & Terminal Facilities
Gate Capacity & Future Needs

Baseline Gate Capacity: 66

Notes:
MAP = Million Annual Passengers

FY2016: 28.7 MAP
CY2016: 29.2 MAP

Future gate requirements:
- 37 MAP (On or before 2020)
  - 70 - 72 gates
- 42 MAP (On or before 2025)
  - 75 – 77 gates
- 53 MAP (On or before 2035)
  - 83 – 85 gates

Notes:
MAP: Million Annual Passengers
New Gates Require Terminal Processing Support Functions

ADDITIONAL GATES

TERMINAL FACILITIES

SECURITY SCREENING
CHECK-IN
CBP/FIS
CONCESSIONS
HOLDROOM
BAGGAGE PROCESSING

LANDSIDE FACILITIES & INFRASTRUCTURE
Landside
Landside Facilities & Infrastructure

- Public Parking
- Terminal Curb Front
- Rental Car Facilities
- Terminal Roadway System
Terminal Curbfront
Level of Service (LOS) Characteristics (Illustrative)

Free flow – no interference
Relatively free flow – some double parking
Double & sometimes triple parking – Planning Conditions
Triple parking – Through lanes capacity impacted/reduced
Gridlock – Consistent congestion & delay

SOURCES: ACRP Report 25, Airport Passenger Terminal Planning and Design
Immediate/short-term improvements are necessary to address existing conditions.
Even with the implementation of short-term improvements (to be defined), additional landside capacity enhancements will be required.
Arrivals Level Terminal Curbside LOS - Forecast

MAP: Million Annual Passengers

Even with the implementation of short-term improvements (to be defined), additional landside capacity enhancements will be required.

Note: 20-year horizon, per forecast, 42 MAP estimated to be on or before 2025 and 53 MAP estimated to be on or before 2035.
Public Parking Summary

CYPRESS GARAGE
Levels 6 - 9
(4,200 spaces)

HIBISCUS GARAGE
(4,590 spaces)

PALM GARAGE
(2,500 spaces)

FY 2016 MAP: 28.7
CY 2016 MAP: 29.2

(Total Spaces as of May 2017: 11,290)

Future public parking requirements (including valet):
• 37 MAP (On or before 2020)
  • 9,440 hourly/daily spaces
  • 3,430 long-term spaces
  • 12,870 total spaces
• 42 MAP (On or before 2025)
  • 10,640 hourly/daily spaces
  • 3,870 long-term spaces
  • 14,510 total spaces
• 53 MAP (On or before 2035)
  • 13,020 hourly/daily spaces
  • 4,740 long-term spaces
  • 17,760 total spaces

Notes: MAP: Million Annual Passengers and Parking requirements include spaces for long-term parking, historically served through the economy parking product. Assumes accelerated forecast.
Short-Term Improvements

Landside & Terminal
Landslide
Existing Roadway Congestion

- Limited weave distance prior to merge
- Arrivals level roadway narrows from 4 to 2 lanes
- Cross-weaving with arrivals level and departures level traffic
- Roadway narrows from 4 to 3 lanes
- Merge point for arrivals and departures level roadways
- Departures level vehicles attempting to reach Perimeter Road results in cross-weaving of arrivals and departures level traffic
- Limited weave distance for vehicles exiting Cypress Garage and Rental Car Center (RCC)
- Roadway narrows from 4 to 3 lanes
Merging/Weaving & Exit Roadway Improvements

- Provides greater decision distance for vehicles exiting Cypress and merging onto outbound terminal roadway.
- Channels northbound and southbound traffic to minimize weaving
- Adds a new lane to the outbound terminal roadway
- New connection to Perimeter Road minimizes weaving
Roadway Management Technology (Flexing) - Dynamic Messaging Signs (DMS)

- Locate DMS prior to Arrivals & Departures Signs
- DMS to show travel time on each level or congested level alert
- Continue with FDOT coordination to have DMS on US-1 and I-595 (If possible)
Pedestrian Signalized Crosswalks

Illustrative Example

Photo Source: Google – John Wayne Airport
Arrivals Level Terminal Curbside LOS

Existing Conditions (2015)

2020 Conditions with Short-term Improvements

LEGEND
Terminal LOS – Peak Month Average Day (PMAD):
- C or better
- D
- E
- F
Departures Level Terminal Curbside LOS

Existing Conditions (2015)

2020 Conditions with Short-term Improvements

Terminal LOS – Peak Month Average Day (PMAD):
- C or better
- D
- E
- F

LEGEND
Terminal
Post-Security Checkpoint Terminal Connection Plan

T3-T4 Connector completed November 2016
Terminal Connection Plan
Proposed T1-T2 Connector Concept
Terminal Connection Plan
Proposed T2-T3 Connector Concept
Additional Terminal Improvements under consideration

- Temporary terminal facility for additional gates
- Terminal 4 ticket lobby and baggage claim expansion / modernization
- Terminal 3 / Terminal 4 connector building (pre-security)
Master Plan Concepts for Serving Demand through 2035

Terminal & Landside
Terminal
Terminal Development Planning Guidelines

- Baseline conditions assume 66 gates
- The EIS Record of Decision for the South Runway Program includes consideration of the expansion of gates up to 77
- Terminal Development Alternatives propose the following incremental phasing:
  - Phase 1: 77 gate build out
  - Phase 2/3: 83-85 gate build out
  - Ultimate Phase: 95 gate build out
- Goal of each incremental phase is to provide additional gate capacity while replacing older facilities with minimal operational impacts
Terminal Development Concepts

**Legend**

- Short-Listed Concepts

<table>
<thead>
<tr>
<th>Phase 1</th>
<th>Phase 2A</th>
<th>Phase 2B</th>
<th>Phase 3A</th>
<th>Phase 3B</th>
<th>Ultimate</th>
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<tr>
<td>Satellite Pier Opt 1</td>
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Terminal Development Concepts

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<th>Phase 1</th>
<th>Phase 2A</th>
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<td>T4 West Extension</td>
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Legend:
- Short-Listed Concepts
## Screening Matrix for Terminal Development Concepts

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<th>Satellite Option 1</th>
<th>Satellite Option 2</th>
<th>Satellite Option 3</th>
<th>Satellite Option 4</th>
<th>Satellite Option 5</th>
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<td>Relative (to other Alternatives) Costs</td>
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**LEGEND:**
- **Meets Criteria**
- **Partly Meets Criteria**
- **Does not Meet Criteria**
- **Short-listed Concepts**
Short Listed Terminal Concepts
Phase 1 Development (77 Gate Complex)

Short-listed (from those considered):
- Develop mid-field Concourse and/or Expand Concourse G to the west
- New south side gates in Concourse G West extension in Concepts 5 & 6 are anticipated to be NB/WB capable that would serve as domestic/international swing gates.
Short Listed Terminal Concepts
Phase 2/3 Development (83 - 85 Gate Complex)

Short-listed (from those considered):
Develop mid-field Concourse and/or Expand Concourse G to the west

Note: New south side gates in Concourse G West extension in Concepts 5 & 6 are anticipated to be NB/WB capable that would serve as domestic/international swing gates.

Concept 1
Concept 5
Concept 6
Short Listed Terminal Concepts
Ultimate Phase (Post 2035) Development (95 Gate Complex)

Concept 1

Concept 6

Concept 5

Short-listed (from those considered):
Develop mid-field Concourse and/or Expand Concourse G to the west

Note: New south side gates in Concourse G West extension in Concepts 5 & 6 are anticipated to be NB/WB capable that would serve as domestic/international swing gates.

Narrowbody Gate
Widebody Gate

Targets balance with practical airfield capacity
Landside
Range of Landside Concepts Considered

- Ingress/Egress
- Terminal Roadway
- Terminal Curb
- Parking and Rental Car Facilities
Preliminary Terminal Curbside and Roadway Expansion Alternative

On-Airport Improvements

Supplemental Curb

Potential New Palm Garage and Other

Cypress Garage Exit

Realigned and expanded outbound roadway (Departures)

Realigned and expanded outbound roadway (Arrivals)

Development Area to meet future Airport Support Needs

New Perimeter Road Connector
Preliminary Terminal Curbside and Roadway Expansion Alternative With Off-Airport Improvements

- Potential New Palm Garage and Other
- New NB U.S. 1 Flyover
- Off-airport road widening
- New Bridge over U.S. 1
- Development Area to meet future Airport Support Needs
Examples of Automated People Mover Systems (APM)

Existing

Tampa International Airport

Miami International Airport

Orlando International Airport

Proposed
Preliminary Automated People Mover (APM) Concept

- Potential extension of APM
- Bi-Directional Airport APM
- New Palm Garage
- Development Area to meet future Airport Support Needs
- Potential Intermodal Station (Option 1)
- Potential Intermodal Station (Option 2) with Parking Facilities Adjacent or Above
- Potential extension of APM
Next Steps
Next Steps

- Complete the current Terminal Modernization Program
- Continue work on short-term improvements; return to Board for approval
- Stakeholder engagement and meetings
- Complete identification of Airport-wide needs (full Airport campus to include cargo, business/general aviation, ancillary/support facilities etc.)
- Further refinement to future development concepts
- Continuation with subsequent master planning tasks
Stakeholder Engagement and Meetings Review

POLICY ADVISORY COMMITTEE
First Meeting: September 22nd 2016
Next meeting: 2nd Quarter 2017
Third Meeting: 3rd Quarter 2017

TECHNICAL ADVISORY COMMITTEE
First Meeting: September 28th 2016
Next Meeting: 2nd Quarter 2017
Third Meeting: 3rd Quarter 2017

PUBLIC MEETINGS - Up to 3 Meetings
Fall 2017
Winter 2018
Spring 2018