

# MIA

MIAMI INTERNATIONAL AIRPORT

# Passenger Hub

2011-2012



MIAMI-DADE AVIATION DEPARTMENT

# MIA - THE HEMISPHERIC PASSENGER HUB

## MARKET OVERVIEW

### THE LOCAL MARKET

Miami International Airport (MIA) serves a large and diverse population base, spanning Miami-Dade, Broward and Palm Beach counties and comprising one of the top ten largest metropolitan areas in the United States with over 5.5 million residents. Miami-Dade County accounts for almost half of the population of Southeast Florida.

### THE VISITOR MARKET

Miami-Dade attracts over 12 million visitors annually, nearly half being international. Miami is the second top destination in the USA for international tourists and has consistently ranked among the top five preferred destinations in the USA for international travelers since 1990.

Greater Miami offers exceptional natural assets, including an ideal year-round climate, renowned beaches and world class attractions. Miami offers close proximity to all of the Orlando area tourist attractions as well.

During 2010, Miami's visitor numbers totaled 12.6 million, with a record 6.1 million, or 48% international visitors and 6.5 million, or 52% domestic visitors.

Over 98% of all visitors to Miami arrive by air.

The Port of Miami is the world's busiest cruise port, with over 4 million passengers per year. The world's largest cruise lines are based in Miami. MIA provides the Port of Miami with 60% of its passenger base.

### THE BUSINESS MARKET

With an exceptional international business base, Miami-Dade is the hemispheric center for commerce in the Americas, facilitated by extensive business infrastructure and a multicultural, multilingual population.

Miami excels in international trade and finance and serves as the base for transactions between North America and the world with the Latin American / Caribbean region.

There are about 1,000 multinational corporations in the area, of which nearly 600 companies maintain Latin American headquarters.

With the third largest consular corps in the USA, greater Miami has 73 foreign consulates, 42 bi-national chambers of commerce and 21 foreign trade offices.

In international trade finance and investment, Miami has the largest concentration of domestic and international banks south of New York City, with approximately 100 financial institutions and 51 foreign bank agencies.

International trade is one of Miami's top two leading industries, with air trade value reaching \$50.7 billion during 2010.



## RANKINGS OF MAJOR U.S. AIRPORTS

International Passengers 2010

Rank	Airport	City	Int'l Passengers (Millions)
1	New York Kennedy (JFK)	New York	23.1
<b>2</b>	<b>Miami International (MIA)</b>	<b>Miami</b>	<b>16.9</b>
3	Los Angeles International (LAX)	Los Angeles	15.9
4	Newark International (EWR)	Newark	11.2
5	O'Hare International (ORD)	Chicago	10.4
6	Hartsfield Atlanta International (ATL)	Atlanta	9.1
7	San Francisco International (SFO)	San Francisco	8.8
8	Houston Intercontinental (IAH)	Houston	8.5
9	Washington Dulles International (IAD)	Washington, DC	6.4
10	Dallas-Ft. Worth International (DFW)	Dallas	5.5

Source: ACI/CY 2010

### MIA RANKINGS AND STATURE

Miami International Airport is the second leading gateway to the USA following New York's JFK Airport.

MIA is the largest gateway to the Latin American / Caribbean region with over 1,100 weekly departures to 67 destinations in the region.

MIA is Florida's busiest airport, and the premier international gateway to Florida, handling nearly 70% of Florida's total international passenger traffic.

With a passenger catchment area that reaches and encompasses Orlando, Miami provides global access for Florida's high and growing population, as well as serving as the entry point for millions of annual visitors and business travelers who choose Florida for leisure and/or business purposes.

### MIA AIR SERVICE ATTRIBUTES

MIA offers an extensive air service network stretching to nearly 150 destinations on four continents. Air service is provided by a total of 72 scheduled and 23 charter carriers.

MIA celebrated the inaugural of Lufthansa's Airbus A380 daily service on June 10, 2011



### MIA AIR SERVICE ATTRIBUTES

During 2010, MIA set a new all-time record for annual passenger traffic with 35.7 million passengers, shattering the previous record of 34.5 million set in 1997.

Of the total passengers that traveled through MIA, 16.9 million, or 47% were international, and 18.8 million, or 53% were domestic.

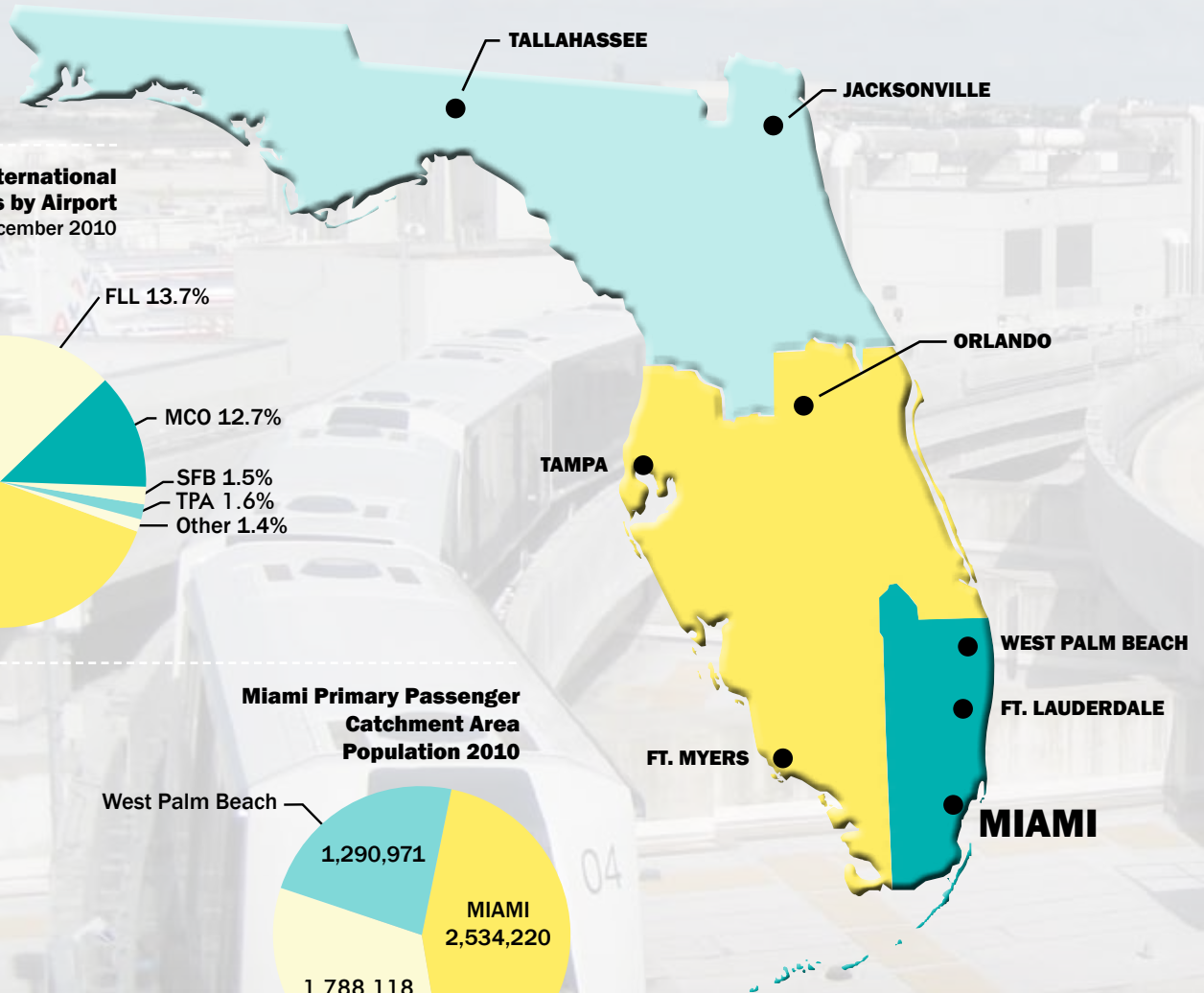
MIA maintains one of the highest international to domestic passenger ratios of any US airport.

MIA supports multiple airline and multiple daily frequencies to virtually every capital and secondary city / business center in the Latin American / Caribbean region.

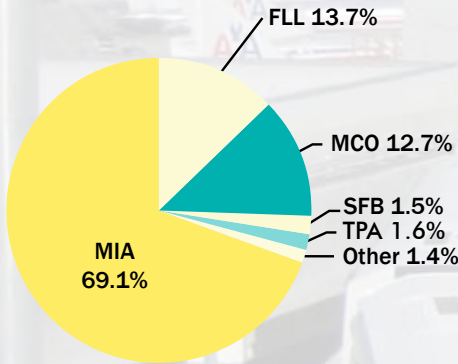
During 2010, MIA handled 47% of the U.S. - South American passenger market, 30% of U.S. - Central American and 29% of the U.S. - Caribbean passenger markets.

MIA is the largest connecting point for flights between the Americas, and for flights between the Americas and Europe.

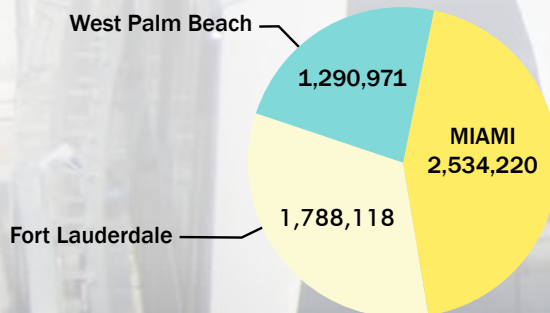
## MIA-FLORIDA PASSENGER CATCHMENT AREA MAP



**Florida International Passengers by Airport**  
Year Ending December 2010

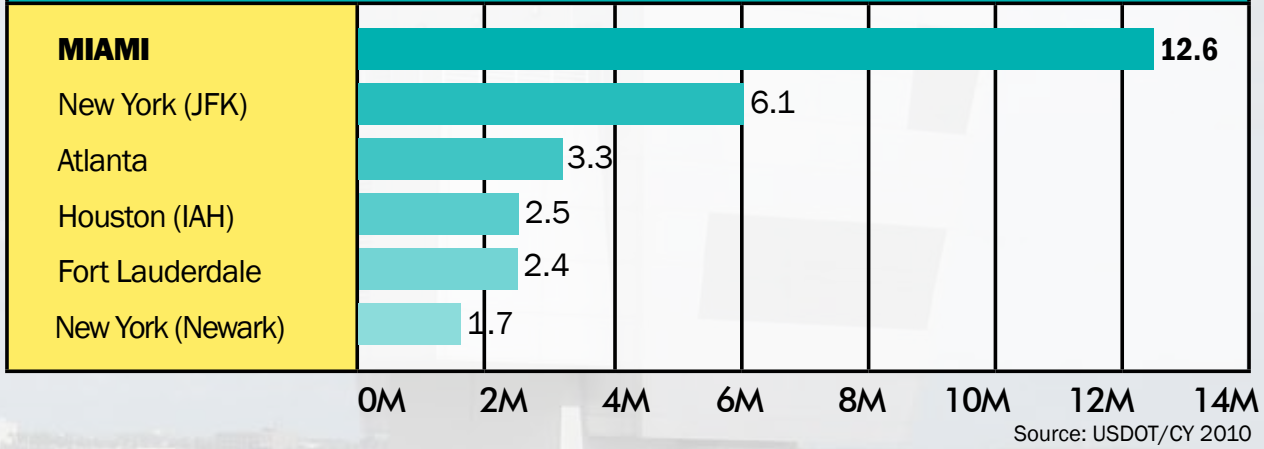


**Miami Primary Passenger Catchment Area Population 2010**





## TOTAL PASSENGERS TO LATIN AMERICAN & CARIBBEAN DESTINATIONS BY U.S. GATEWAY - In Millions



### MIA PASSENGER FACILITIES

MIA is nearly completed with its \$6.4 billion Capital Improvements Program (CIP). The CIP includes an expanded and efficient airfield with four runways and several new taxiways, expanded parking, a central collection plaza, additional lanes at upper/lower terminal drives, and enhanced connections to the surrounding expressways and the new Rental Car Center (RCC).

The RCC opened July 2010 and is a 3.4 million square foot facility. It consolidates under one roof the operations of 16

rental car companies, with a combined inventory of 6,500 rental cars. The Center serves approximately 28,000 customers daily.

The MIA Mover, a 1.25 mile-long, elevated people mover system, began connecting passengers from MIA to the RCC in September 2011.

The CIP's largest components are the new South and North Terminals. Combined, the new terminals add over 4 million square feet to MIA's prior 3.5 million square feet of terminal area space.



## SOUTH TERMINAL

The new South Terminal includes Concourse H and Concourse J, and provides the following amenities:

- An additional 1.7 million square feet to MIA.
- 28 gates and three checkpoints.
- A new federal inspection facility able to process 2,000 passengers per hour.
- 60,000 square feet of concession space, including 61 food and beverage, retail and duty-free shops.

United Airlines, their partners in the Star Alliance and code share airlines, as well as Delta Air Lines, their partners in the SkyTeam Alliance and code share airlines occupy the new facilities.

## NORTH TERMINAL

The North Terminal encompasses more than 3.8 million square feet with the last of its phased completion scheduled for the last quarter of 2012. This project provides state of the art facilities and conveniences, including:

- A new 48-gate facility, over 1.1 miles in length, capable of accommodating fully independent domestic and international arrivals at each gate.
- An attached Regional Commuter facility, complete with 2 contact gates.
- A new federal inspection facility with 72 check lanes able to process up to 3,600 passengers per hour.
- An automated people mover moving 9,000 passengers per hour.
- A gate delivery automatic Baggage Handling System (BHS) with over 9.5 miles of conveyors with a capacity to process 6,400 bags per hour.
- 166,922 square feet of concession space, including 118 food and beverage, retail and duty-free shops.

American Airlines, American Eagle and oneworld Alliance airlines will be located in the North Terminal.



## KEEPING MIA COMPETITIVE

### NEW AIR ROUTE INITIATIVES

The Miami-Dade Aviation Department, operator of MIA, continually seeks expansion and diversification of its air route network both abroad and in the United States for both passenger and air cargo service.

International route development is presently focused on new and expanded air service to destinations in Europe, Asia, Africa and the Middle East/Gulf Region. Several destinations in each world region are targeted as premium points in MIA's expansion efforts and will receive additional benefits as part of the MIA air service incentive program.

Domestic route development is focused on expansion of frequencies in MIA's top city pairs, new route considerations to

secondary markets, and diversification of the domestic product for greater traveler choices, including recruitment of low cost carrier service. Inquiries regarding new air route air service development may be made to:

[marketing@miami-airport.com](mailto:marketing@miami-airport.com)

### AIR SERVICE INCENTIVES TO AIRLINES

MIA unveiled a new and expanded air service incentives program in the fall of 2010. The **ASIP3** program, offers landing fee and other benefits to passenger and cargo carriers in various broad and narrower arrangements according to the desired services being sought by MIA. A brochure containing all details, benefits and qualifications is offered on-line at:

[www.miami-airport.com](http://www.miami-airport.com).

## MIA TOP MARKETS & TOTAL PASSENGERS YEAR 2010

DOMESTIC	
New York, New York	2,979,329
Atlanta, Georgia	1,492,585
Chicago, Illinois	1,184,009
Dallas/Ft. Worth, Texas	1,120,328
Washington, DC	1,021,695
Los Angeles, California	862,162
San Juan, Puerto Rico	854,534
Orlando, Florida	854,441
Boston, Massachusetts	716,355
Charlotte, North Carolina	615,318
Houston, Texas	520,731
Philadelphia, Pennsylvania	492,217
Tampa, Florida	448,846
San Francisco, California	396,922
Detroit, Michigan	301,804
Las Vegas, Nevada	301,021
Raleigh / Durham, North Carolina	260,359
Minneapolis, Minnesota	257,453
Baltimore, Maryland	238,145
New Orleans, Louisiana	232,718
St. Thomas, U.S. Virgin Islands	232,426
St. Louis, Missouri	203,816
Key West, Florida	201,272
Denver, Colorado	175,357
Jacksonville, Florida	137,993

INTERNATIONAL	
Brazil	1,318,553
Mexico	1,007,672
Colombia	988,110
Dominican Republic	922,959
United Kingdom	795,591
Venezuela	783,469
Canada	717,198
Bahamas	650,754
Argentina	567,078
Costa Rica	539,285
Jamaica	539,101
Peru	534,099
Ecuador	533,193
Panama	502,772
Cuba	483,302
Haiti	458,741
Germany	422,315
France	416,838
Spain	395,722
Honduras	338,952
Trinidad	336,816
Nicaragua	320,767
Cayman Islands	317,498
Guatemala	299,151
Chile	293,959

Source: USDOT, T100 Database CY 2010

MIAMI-DADE COUNTY

Carlos A. Giménez  
Mayor



BOARD OF COUNTY COMMISSIONERS

Joe A. Martínez  
Chairman

Audrey M. Edmonson  
Vice Chairman

Barbara J. Jordan  
District 1

Jean Monestime  
District 2

Audrey M. Edmonson  
District 3

Sally A. Heyman  
District 4

Bruno A. Barreiro  
District 5

Rebeca Sosa  
District 6

Xavier L. Suarez  
District 7

Lynda Bell  
District 8

Dennis C. Moss  
District 9

Senator Javier D. Souto  
District 10

Joe A. Martínez  
District 11

José "Pepe" Díaz  
District 12

Esteban Bovo, Jr.  
District 13

Harvey Ruvín  
Clerk of Courts

Pedro J. García  
Property Appraiser

Alina T. Hudak  
County Manager

Robert A. Cuevas, Jr.  
County Attorney

José Abreu, P.E.  
Aviation Director



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*Delivering Excellence Every Day*

Miami-Dade County provides equal access and equal opportunity in employment and services and does not discriminate on the basis of disability.  
"It is the policy of Miami-Dade County to comply with all of the requirements of the Americans with Disabilities Act."