



**ORLANDO INTERNATIONAL AIRPORT**

*The Orlando Experience*<sup>®</sup>

# Transportation Summer Camp 2019

**Phillip N. Brown, AAE**

Chief Executive Officer

July 12, 2019

# We Want To Be A



# WORLD-CLASS AIRPORT

"A World Class Airport provides a seamless arrival and departure experience that anticipates and meets the need of the traveler while imprinting the art, culture, and natural beauty of the region, leaving an enduring memory."

# Challenges Facing the World's Airports

- Shifting Economic and Political Landscapes
- Increasing Passenger Numbers
- Increasing Plane Frequencies and Delays
- Security Concerns
- Funding of Federal Personnel – TSA/CBP
- Growing Customer Service Expectations



# OUR VISION



# ORLANDO INTERNATIONAL AIRPORT

*The Orlando Experience*<sup>®</sup>

## Vision:

Advance Orlando and the region as the premier intermodal transportation gateway for global commerce.



## Mission:

Provide safe, secure, customer friendly, affordable transportation services and facilities that promote The Orlando Experience<sup>®</sup>.

# “The Orlando Experience®”

As gateway to the nation’s most visited destination, we want to showcase diverse arts and cultural highlights for visitors to enjoy. The Orlando Experience® is a design theme conveyed throughout the airport with unique architecture, aesthetics and convenience amenities.





# Greater Orlando Aviation Authority Board



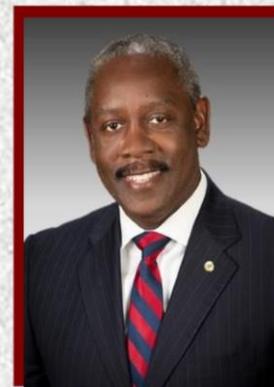
**Domingo Sanchez**  
*Chairman*



**Buddy Dyer**  
*Mayor, City of Orlando*



**M. Carson Good**  
*Vice Chairman*



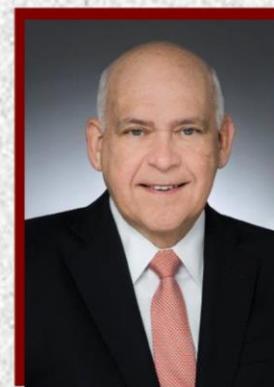
**Jerry Demings**  
*Mayor, Orange County*



**Randall Hunt**  
*Board Member*



**Dr. Jason Pirozzolo**  
*Treasurer*



**Rafael E. Martinez**  
*Board Member*

# Greater Orlando Aviation Authority Board



*Domingo Sanchez*  
**Chairman**

## Board Members

***Carson Good – Vice Chairman***

***Dr. Jason Pirozzolo – Treasurer***

***Buddy Dyer – Mayor, City of Orlando***

***Jerry Demings – Mayor, Orange County***

***Randall Hunt***

***Ralph Martinez***



# HOW WE COMPARE

# BUSIEST AIRPORT IN FLORIDA WITH OVER 49 MILLION ANNUAL PASSENGERS

LARGEST AIRPORT RENTAL CAR MARKET



21,000 BADGED EMPLOYEES



\$41+ BILLION ECONOMIC IMPACT



148 FOOD/BEVERAGE AND RETAIL LOCATIONS



# 4th Largest Airport in the U.S.



**New York JFK ; Los Angeles LAX ; Miami MIA**

All fit inside the footprint of  
Orlando International Airport MCO

**Room To Grow:** 12,700 acres of land  
(20%+ developed)

**Centrally Located:** 9 miles from downtown  
Orlando and 20 miles from major theme parks

**Capacity:** Four parallel, all-weather runways



GROWTH

# RECORD NUMBERS FOR THE LAST 12 MONTHS



**42.1 MILLION**

Domestic Passengers

 **6.0%**



**7.1 MILLION**

International Passengers

 **15.0%**



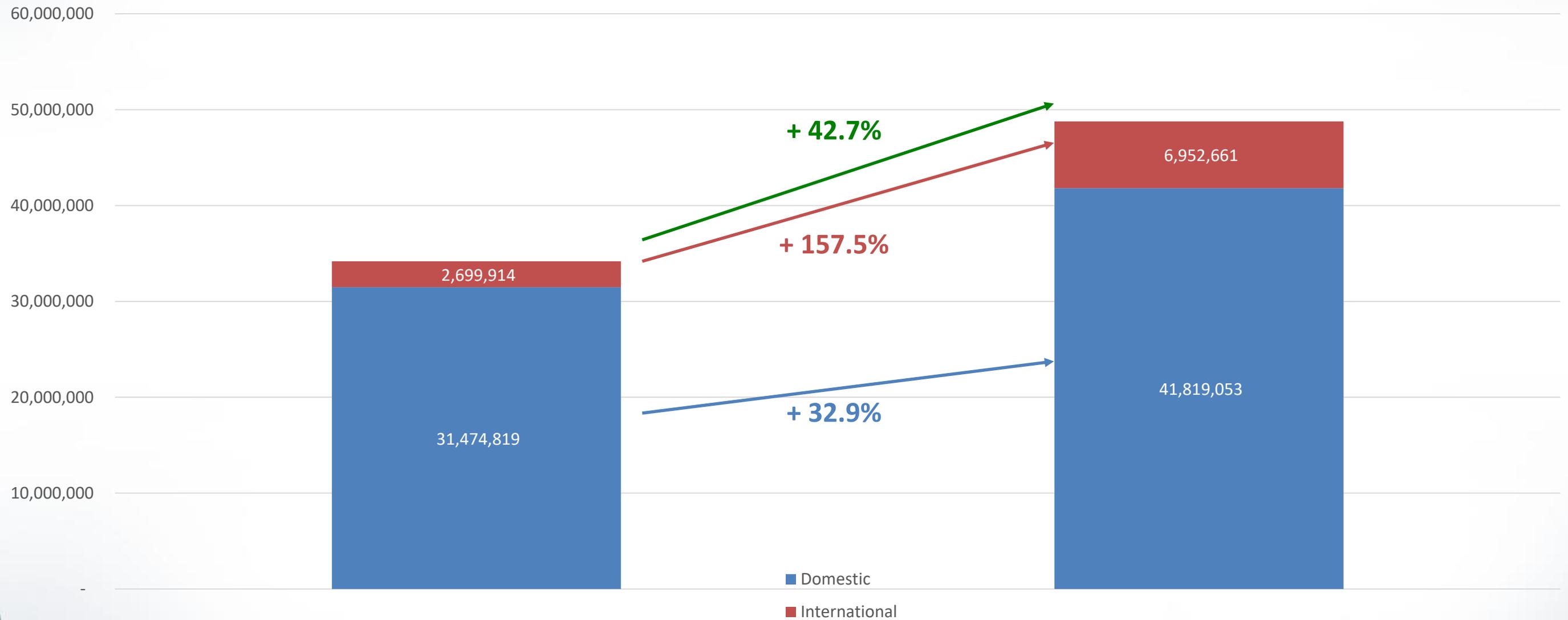
**49.2 MILLION**

Total Passengers

 **7.3%**

Rolling 12 May 2019

# MCO 10-Year Growth [Apr 2009-April 2019]

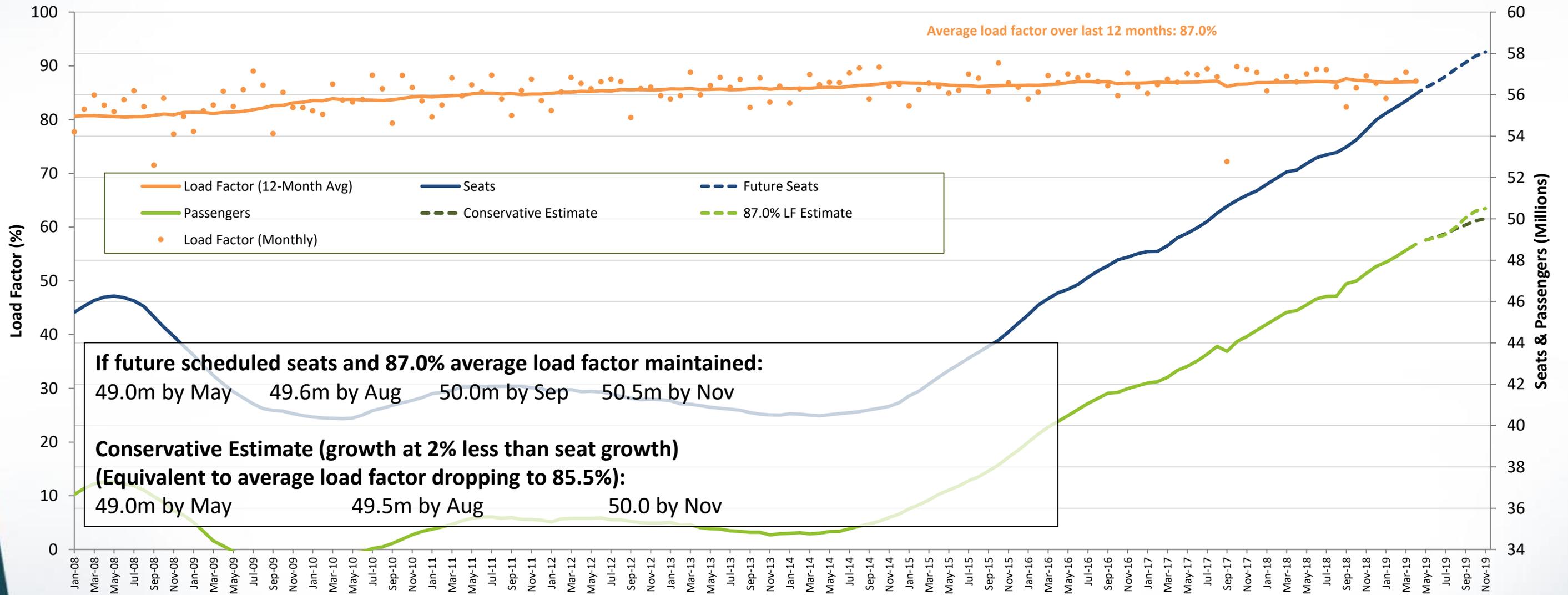






# 59 INTERNATIONAL DESTINATIONS

# Passenger Traffic History & Estimate



Source: Innovata flight schedules and GOAA Airline Landing Reports. Updated June 6, 2019.

Based on currently filed flight schedules which may be subject to significant change.



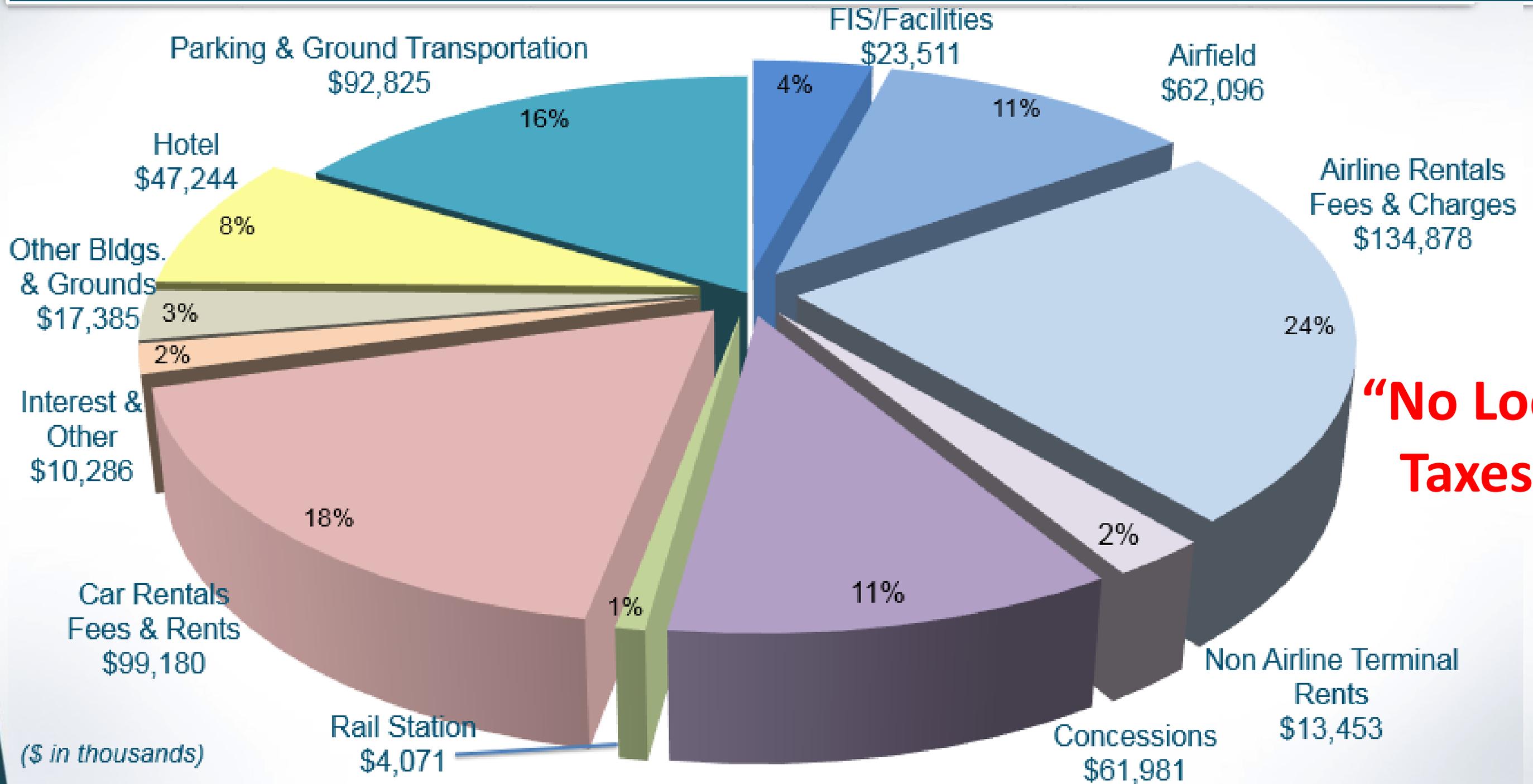
**ORLANDO INTERNATIONAL AIRPORT**

*The Orlando Experience<sup>®</sup>*

**REVENUE**

# Budgeted Revenues - Orlando International Airport

## \$566,910



**"No Local Taxes"**

(\$ in thousands)



# KEEPING UP WITH GROWTH

JCDecaux

# GROWING GAINS...

North Terminal  
Refurbishments Complete



- ✓ Renovated ticket lobbies
- ✓ Enhanced wayfinding
- ✓ Expanded security checkpoints
- ✓ Updated baggage handling system



ORLANDO  
INTERNATIONAL  
AIRPORT

*The Orlando Experience®*

# KEEPING UP WITH THE PASSENGER GROWTH

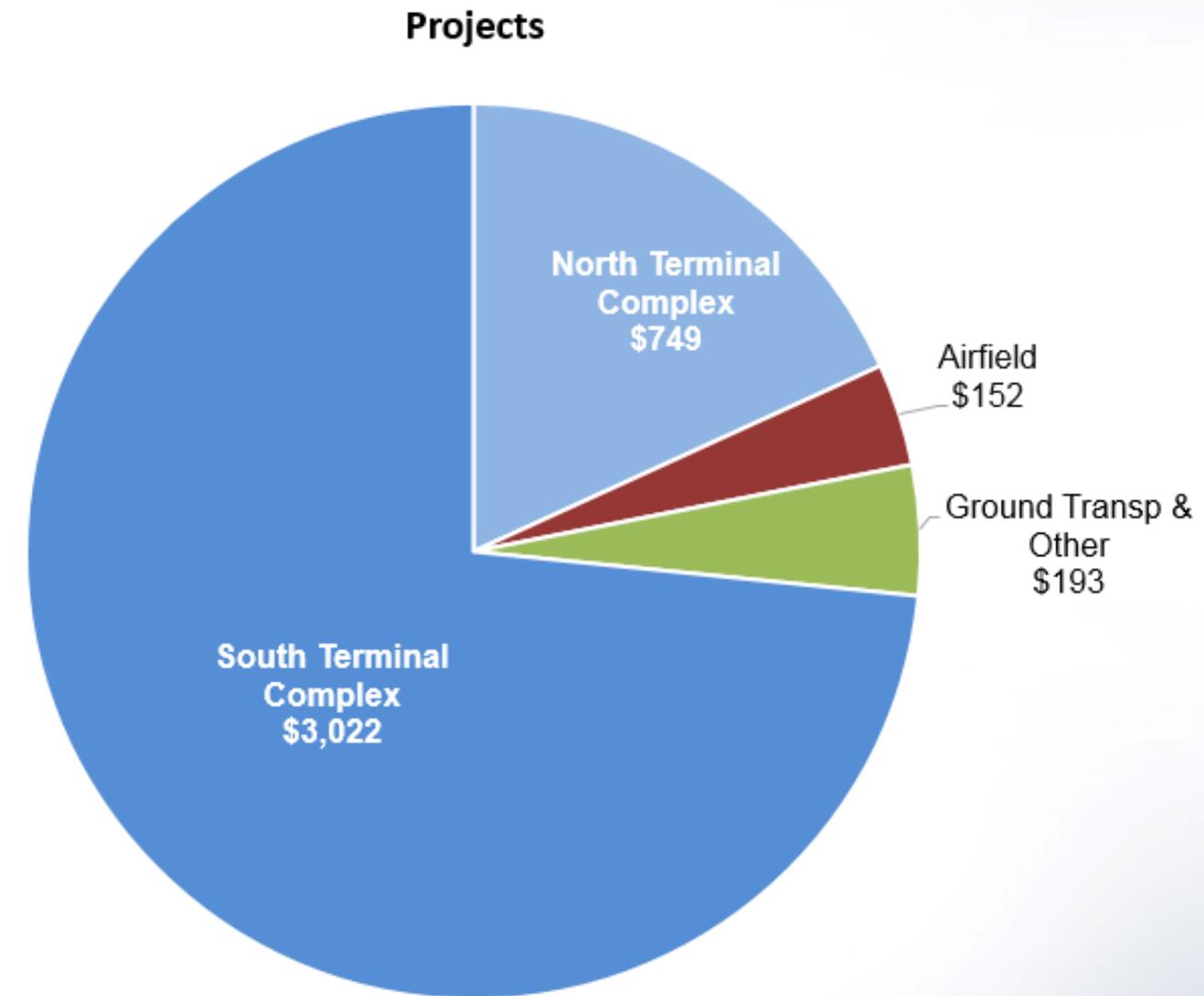
## The FY 2018 – 2025 Capital Improvement Plan is Geared Around Capacity Expansions



# \$4.12 BILLION

Proposed MCO Capital Improvement Program (in Millions):

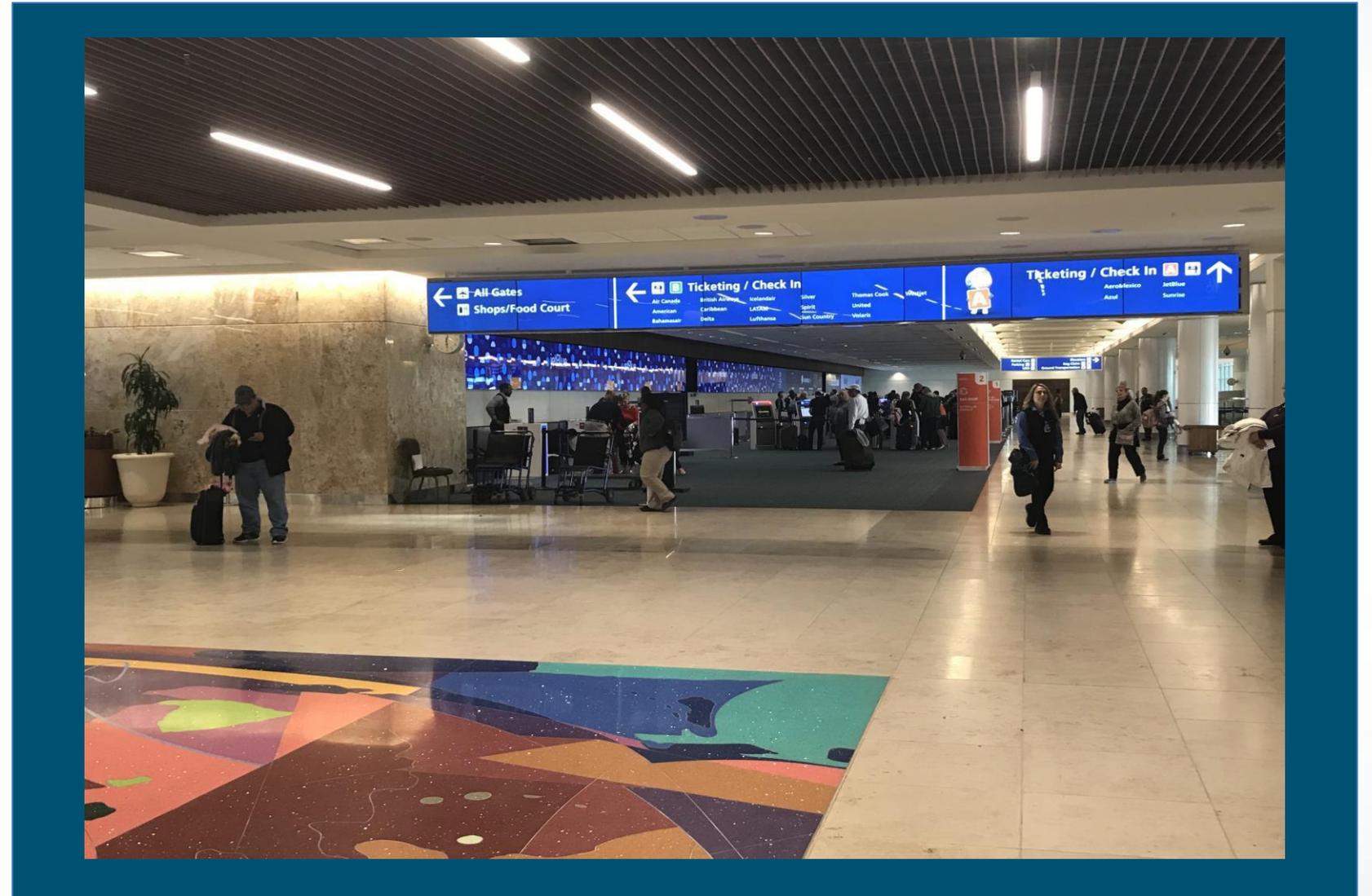
NORTH TERMINAL COMPLEX ENHANCEMENTS	\$ 749
AIRFIELD	152
GROUND TRANSPORTATION AND OTHER	193
SOUTH TERMINAL COMPLEX - TERMINAL C	3,022
	<hr/>
	<b>\$4,116</b>



CIP does not include the Intermodal Terminal Facility which is funded with Florida Department of Transportation (FDOT) Rail Initiative Funding of \$211 million and All Aboard Florida contribution of \$10.1

# Main Ticket Lobby Modifications

Public area improvements with expanded areas for check-in with new and expanded systems and replacement of finishes and check-in counters.

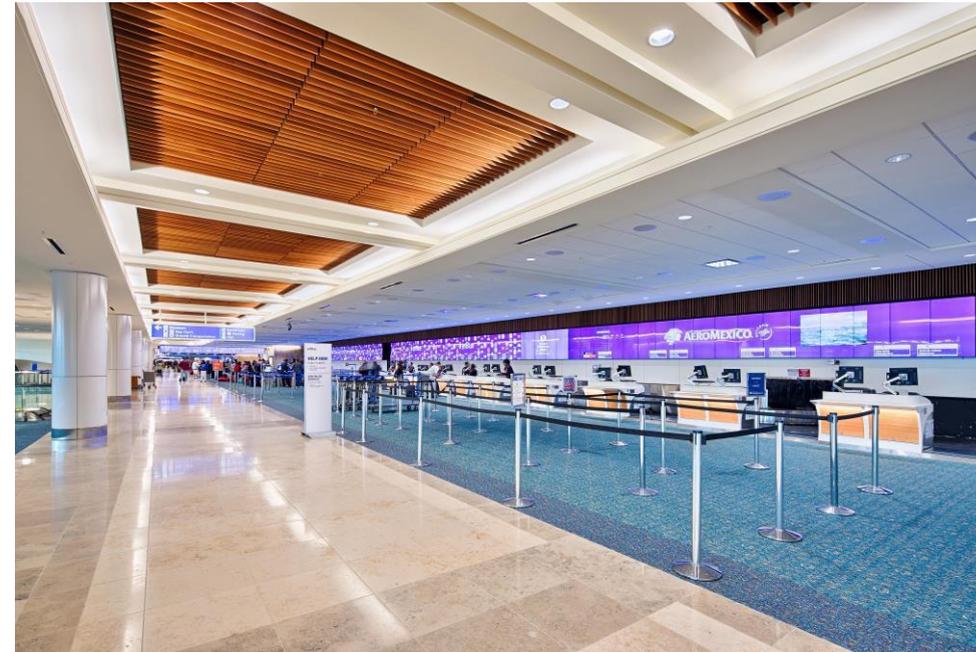


# Ticket Lobby Modifications

1,500 Feet of High-Definition Video Display Walls in Ticket Lobbies



# Ticket Lobby Modifications



# Ticket Lobby Modifications



Fun Garden



Tech Garden



Wellness Garden



Space Garden

# Airside 1 & 3

## AUTOMATED PEOPLE MOVER (APM) SYSTEMS



# South Airport APM Complex



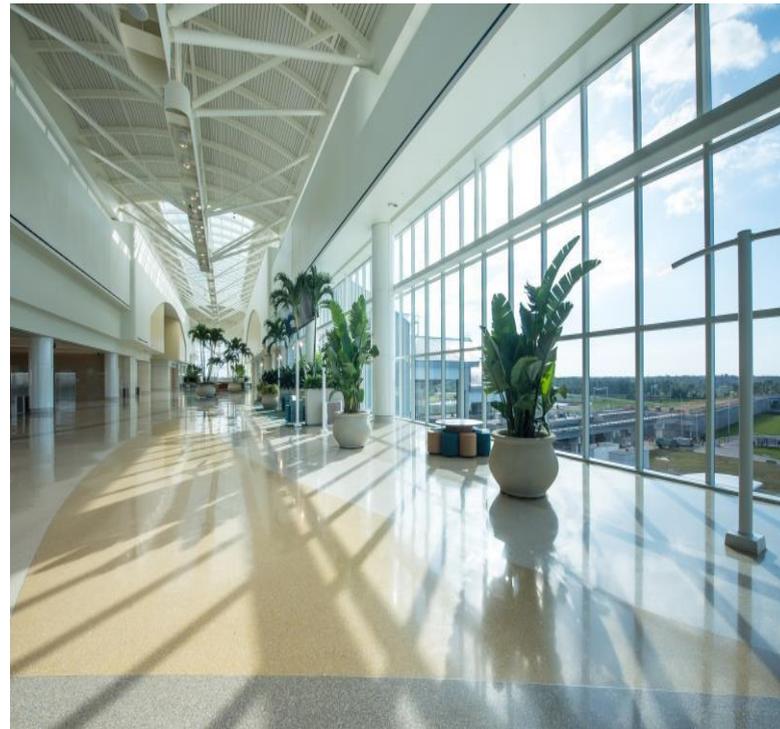
# South APM Complex & Garage C

- 200,000 square foot facility
- Automated People Mover (APM) connects to main terminal
- Less than a 4 minute ride
- Includes 1,690 parking spaces
- 1,200 more parking spaces under construction
- Remote check-in available
- Capacity up to 3 rail systems

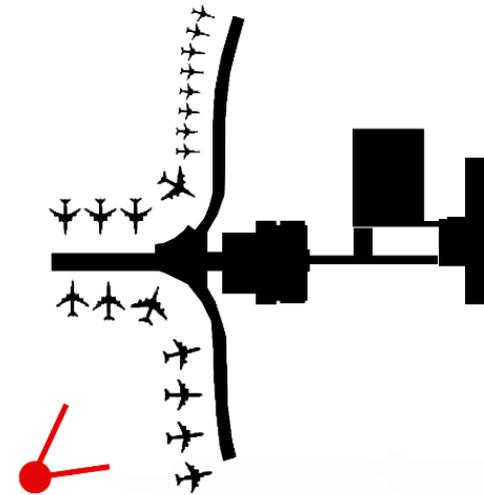
# SOUTH AIRPORT AUTOMATED PEOPLE MOVER (APM)



# Intermodal Terminal Facility

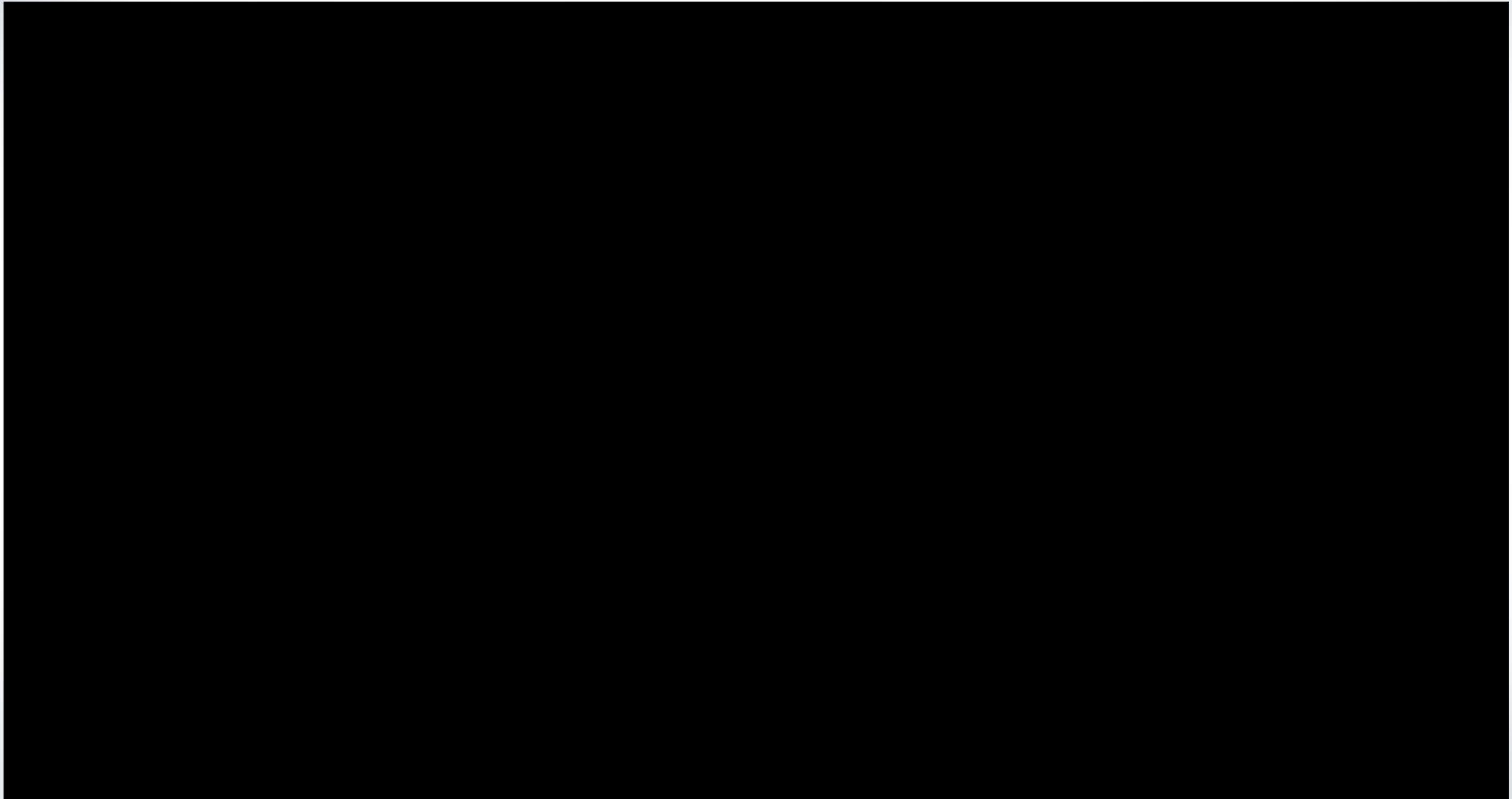


# South Terminal Complex





# South Terminal Complex - Interior

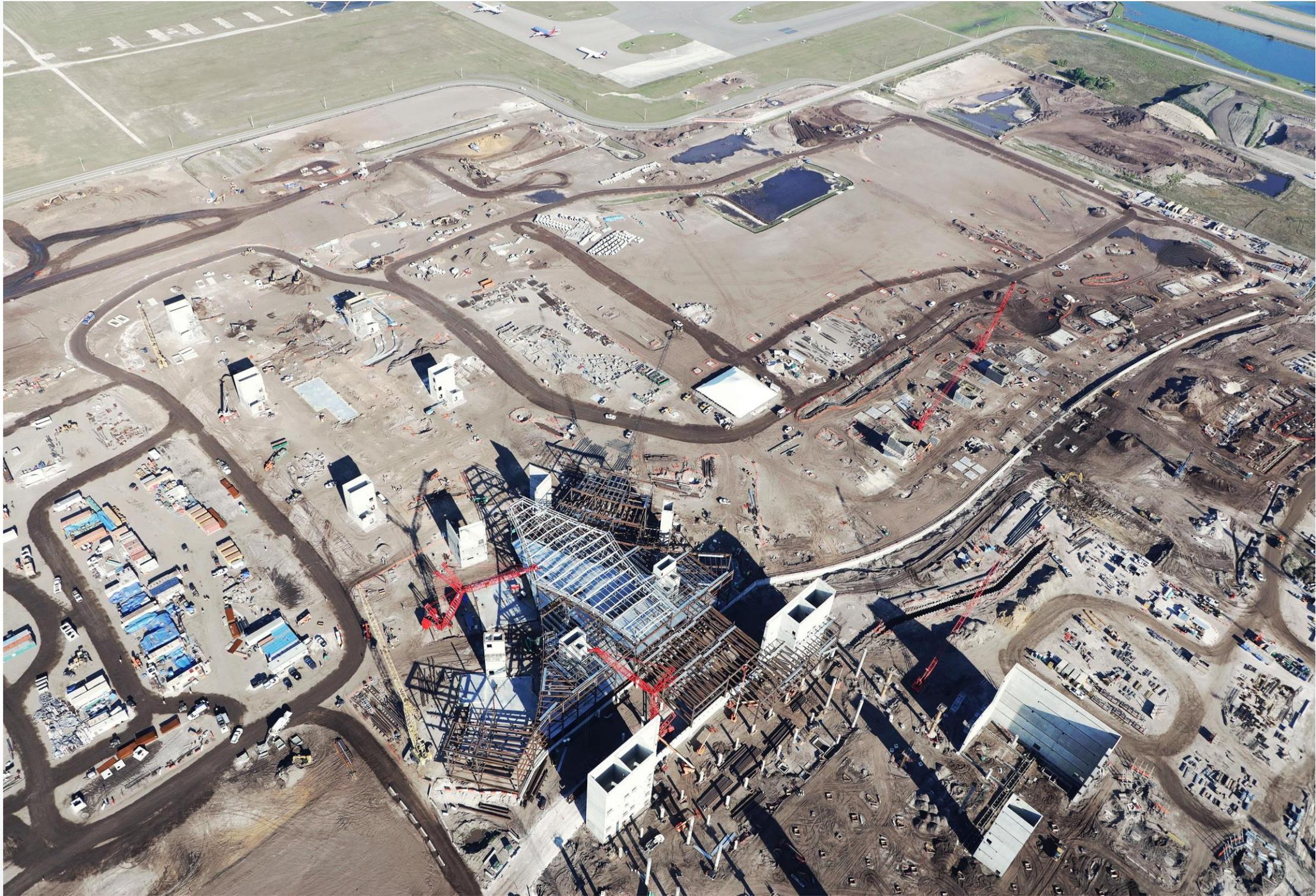


# South Terminal Highlights

## Innovations:

- State of the art Radio Frequency Identification (RFID) tote baggage handling system through the entire terminal; 100% automated screening lanes in TSA Checkpoint
- A “Bags First” processing for Customs and Border Protection in the Federal Inspection Station (CBP/FIS)
- 100% facial recognition for international arrival and departures
- International and domestic gate arrival operations on same boarding pier Virtual Ramp Control (VRC)
- Fully integrated Rail-Air-Ground transportation
- LEED® v4 Campus Program Certification for Existing Buildings and New Construction

# South Terminal C



# How Will We Be a WORLD-CLASS AIRPORT

1. Having a master plan and vision that supports intermodal transportation
2. Promoting air service access that supports the key economic resources
3. Providing world class customer service
4. Working with our congressional delegation and community leaders to support Industry and MCO needs

# #1 in North America for Mega Airports 2 Years in a Row and CAPA's 2018 Large Airport of the Year





## *Questions?*



/flymco



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@MCO

**#FlyMCO**