Vision 2020
Master Plan Update
Public Meeting

Welcome

- First of three community meetings

- Introductions
  - Staff
  - Consultants
  - Participants

- Your input is important - Please hold your questions and comments until the end of today's presentation

Introduction

- Prior master plan was initiated in 2005:
  - Airport was experiencing double digit passenger growth
  - Peak passenger volume was in 2007
  - Expansion to the north was planned for 2015
- State of the airport in 2011:
  - Passenger volume off by 14% from peak
  - Authority hired new CEO
  - New mission and vision statement adopted

“The mission of the Authority is to be a major driver in the economic growth of the Tampa Bay region. The Authority will be a leading edge innovator to create global access and world class customer service to build prosperity for its stakeholders.”

“The vision of the Authority is to be a thriving aviation gateway for the Tampa Bay region, providing global access and economic opportunity for its stakeholder”

TPA Master Plan Study Objectives

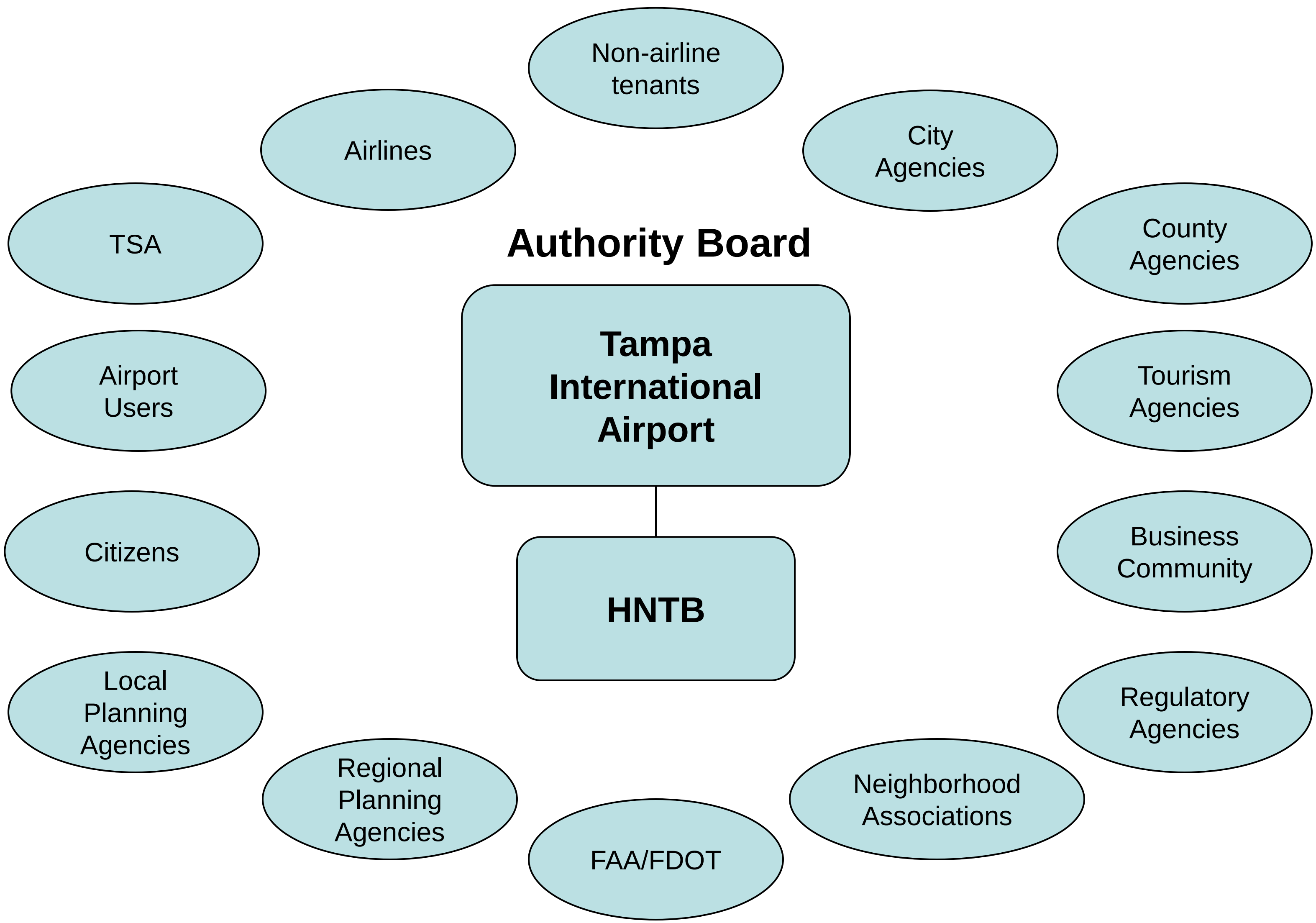
- Establish new airport activity projections
- Evaluate facility capacity
  - Main Terminal
  - Airside Terminals
  - Rental Car Facilities
  - International Terminal
  - Common Use Passenger Processing
- Evaluate all airport real estate
  - South entry property
  - East development property
  - North Expansion property
- Study airport intra-modal and regional multi-modal connectivity
- “Flexible and Ready”

Airport Master Plans

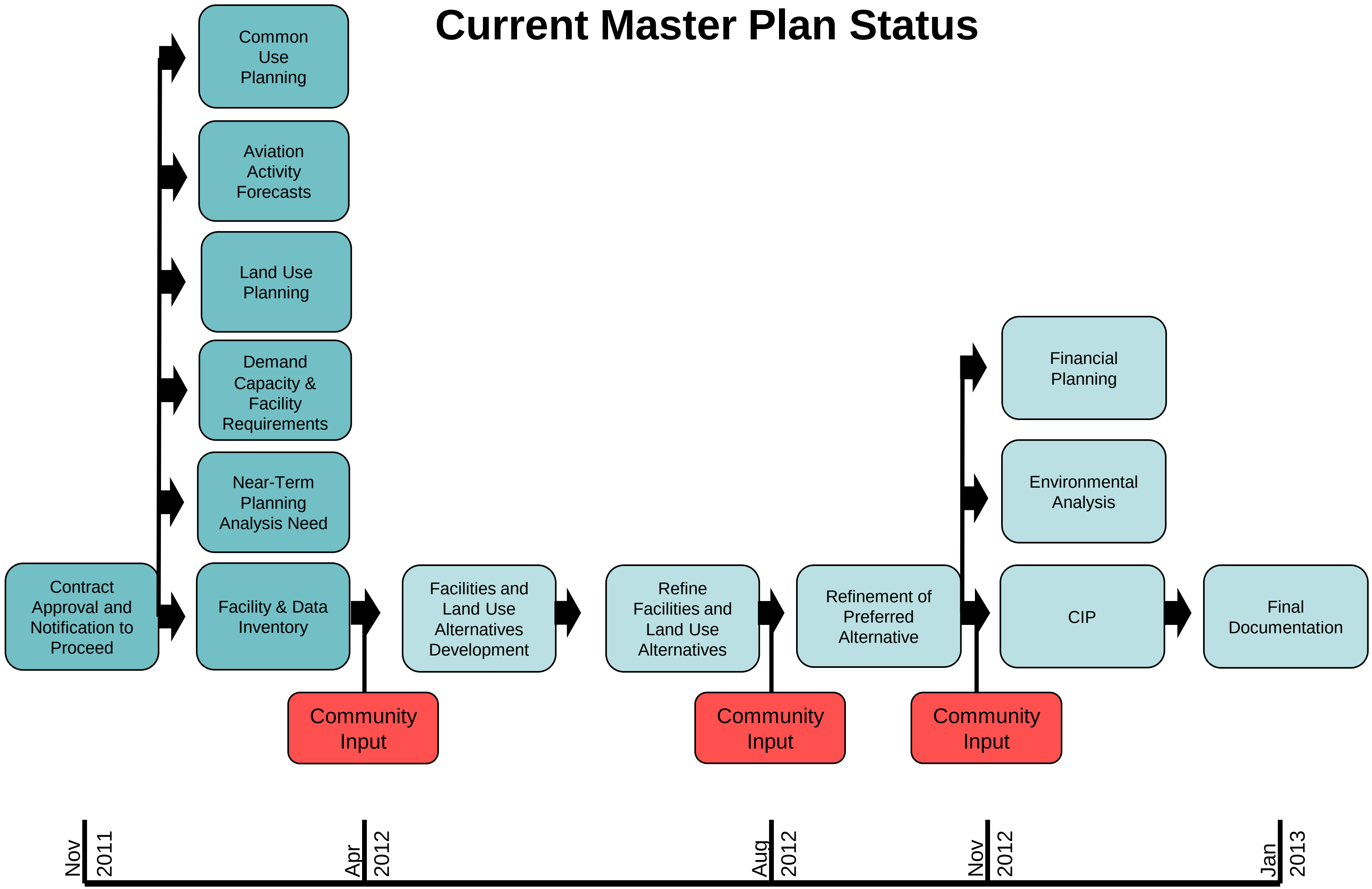
The FAA recommends updating airport master plans every 5 to 6 years and requires that the plans meet the following objectives:

- Update passenger demand forecasts
- Provide a guide for development that is safe, efficient, cost-effective and flexible
- Establish airport development alternatives based on capacity, environment and costs
- FAA requires that property be used primarily for aviation related development
- Justify proposed development through technical, economic, and environmental analysis
- Provide a graphic presentation of anticipated land use
- Outline a schedule and financial plan for future development

A Collaborative Approach

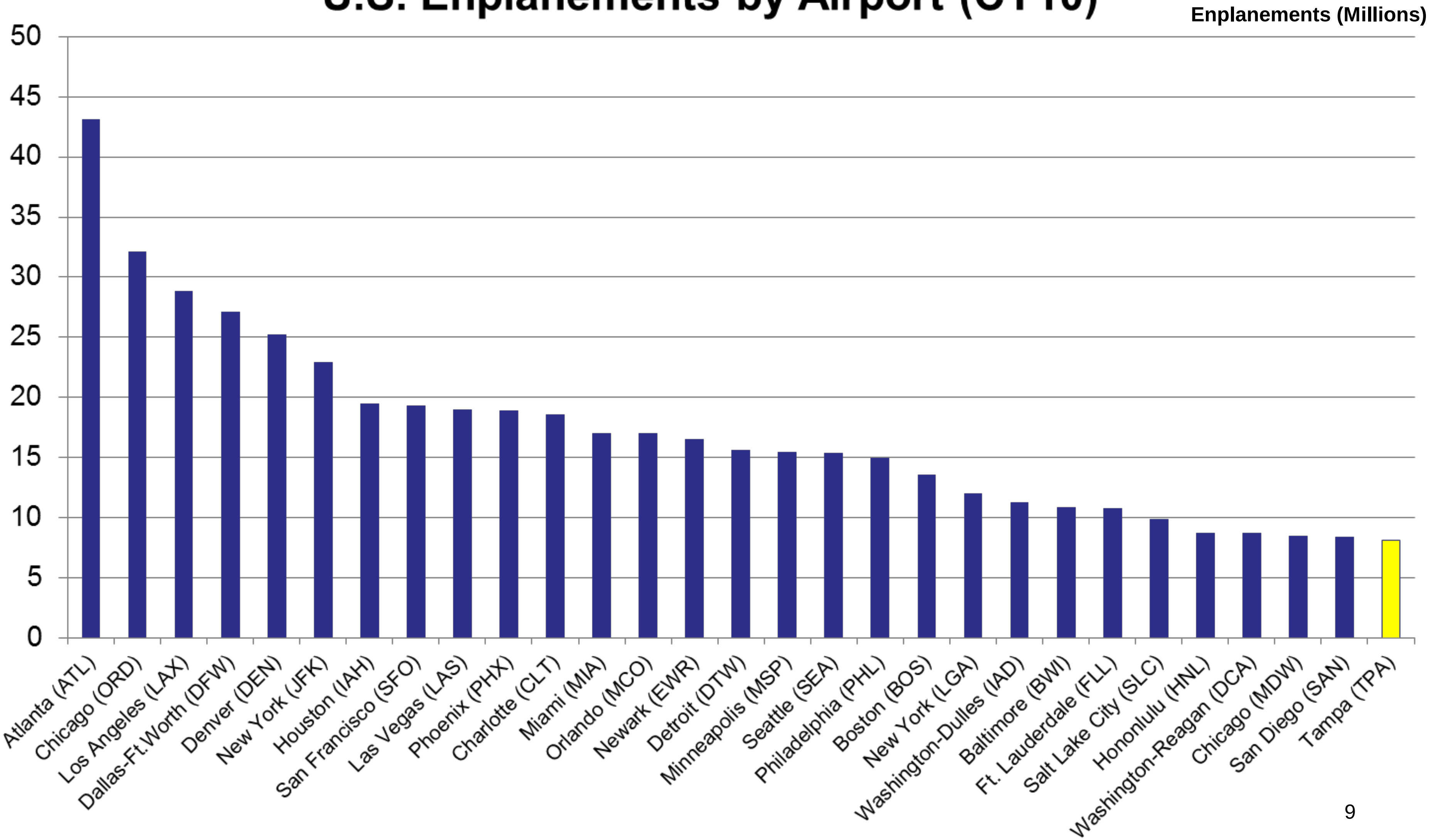


Current Master Plan Status



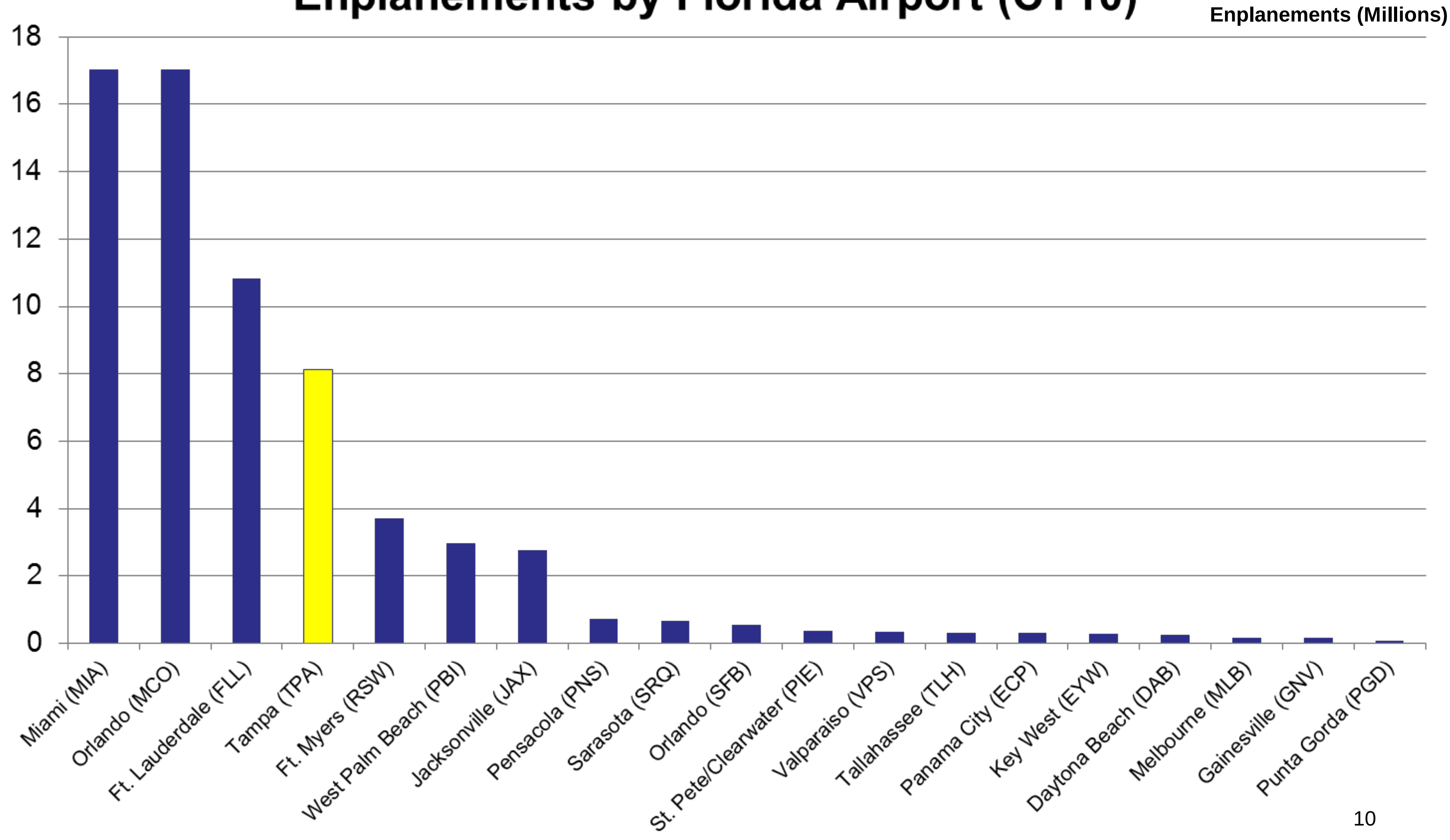
Draft Aviation Activity Forecasts

U.S. Enplanements by Airport (CY10)



Source: FAA Enplanements at Primary Airports

Enplanements by Florida Airport (CY10)



Source: FAA Enplanements at Primary Airports

Draft Aviation Activity Forecasts

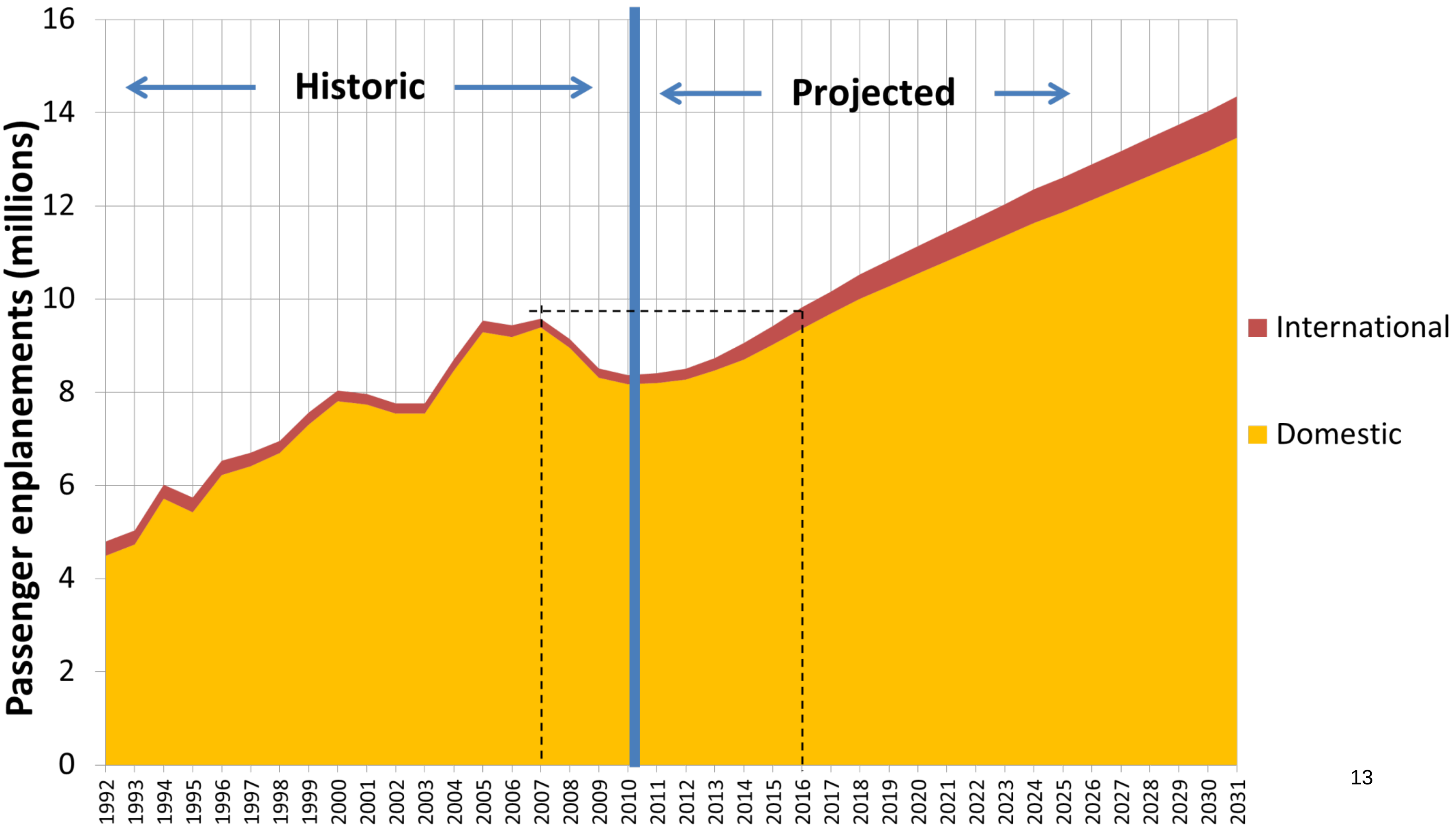
Forecast projections of future passenger activity have been prepared:

- Utilized industry recognized methodologies while accounting for Tampa specific characteristics and market considerations
- Consultant worked with the Authority to define assumptions, market related factors and to gain essential background data
- Final draft forecast will be submitted to FAA for review, comment and formal FAA approval
- Forecast becomes final after FAA review and approval

Changes in Aviation Industry Affect Forecast

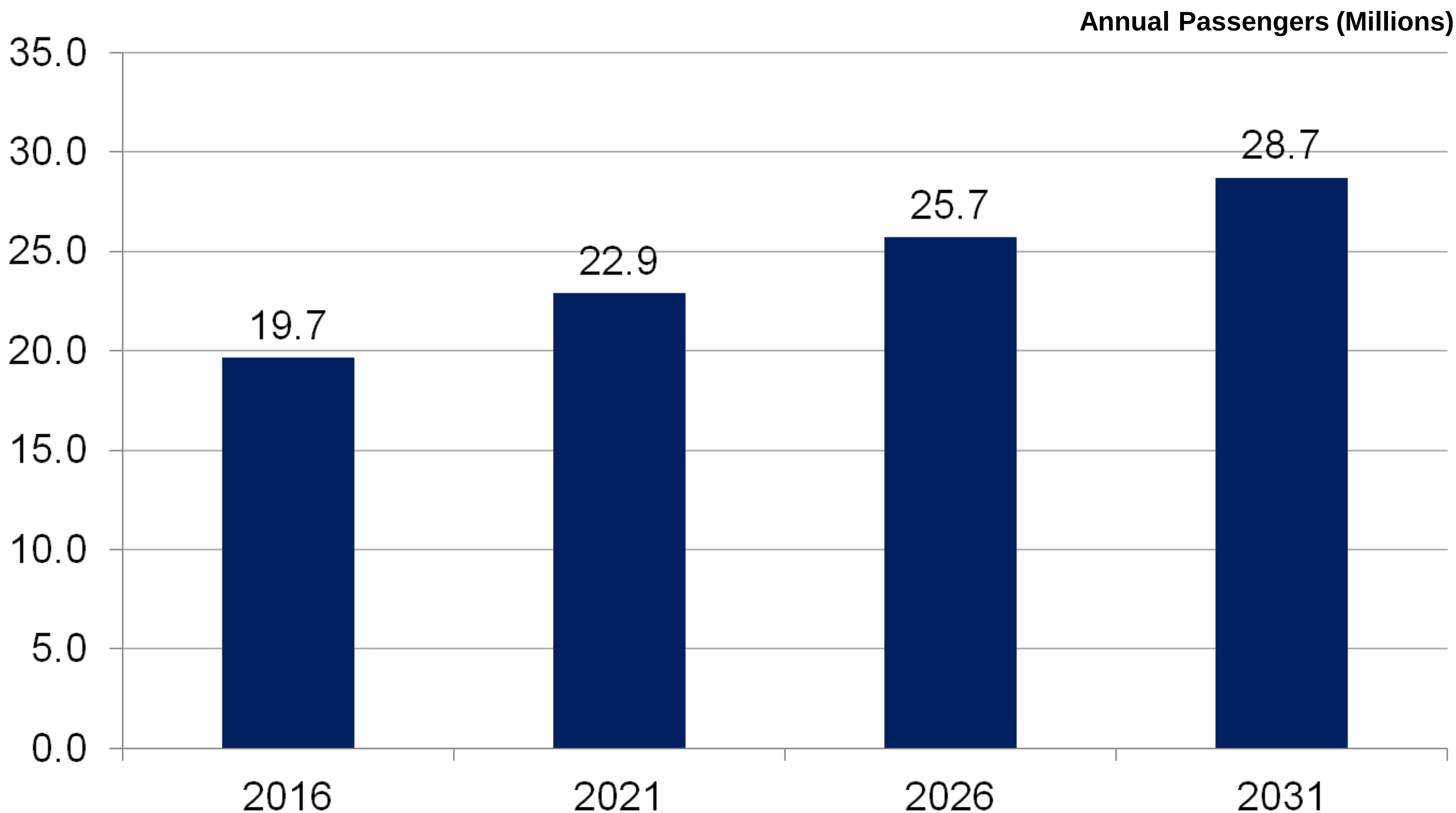
- Financial Crisis and Economic Recession
- Increase Fuel Costs and Fuel Cost Volatility
- Airline Mergers:
  - Delta/Northwest
  - United/Continental
  - Southwest/AirTran
  - American restructuring
- Stronger Airline Capacity Discipline
  - Reduced Service
  - Higher Fares and Fees

Forecast of Passenger Enplanements



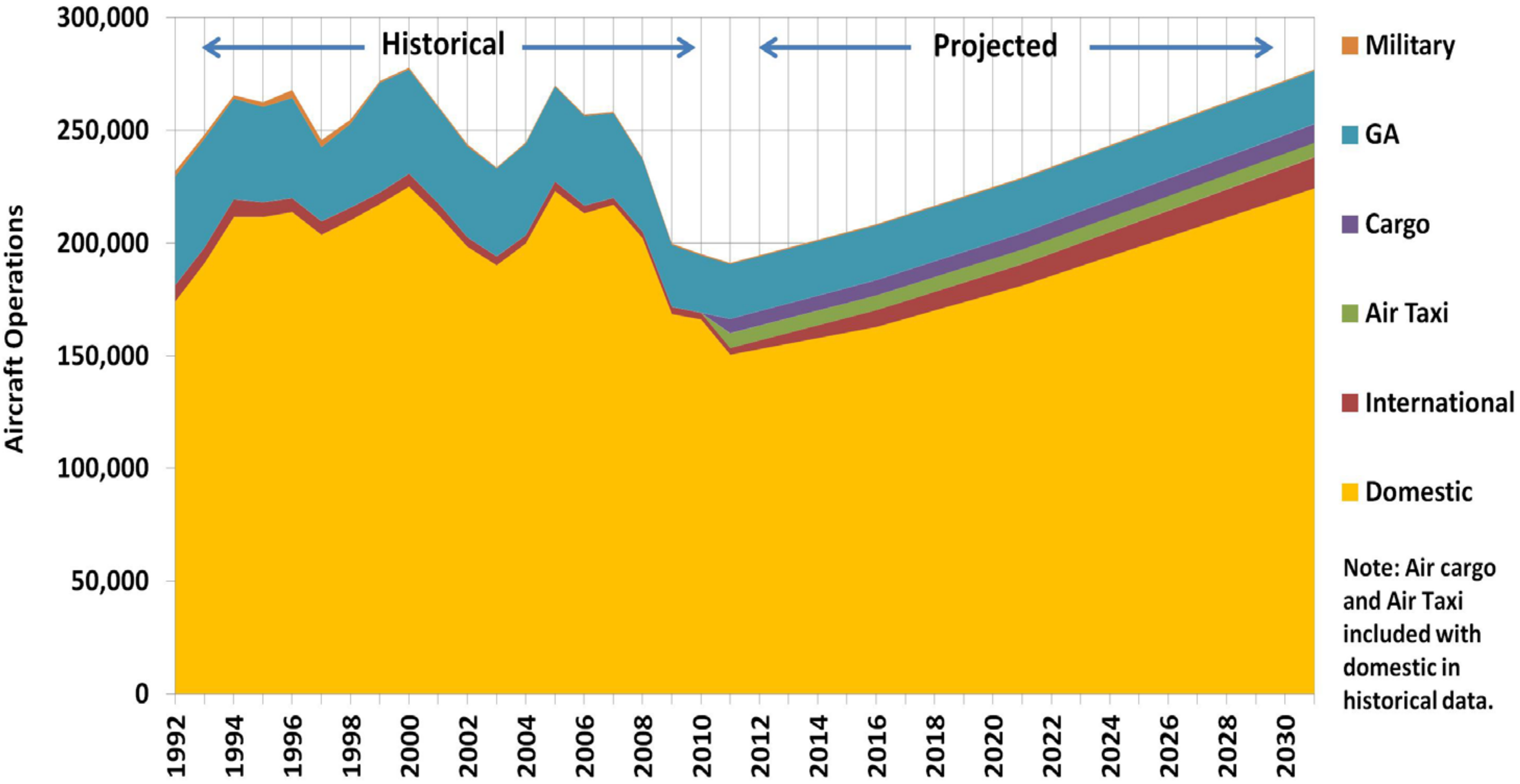
Baseline Passenger Projections

- 2005 master plan – North expansion trigger at 25 to 28 MAP



Average Growth Rate:	3.2%	3.1%	2.9%	2.7%

Forecast for Aircraft Operations

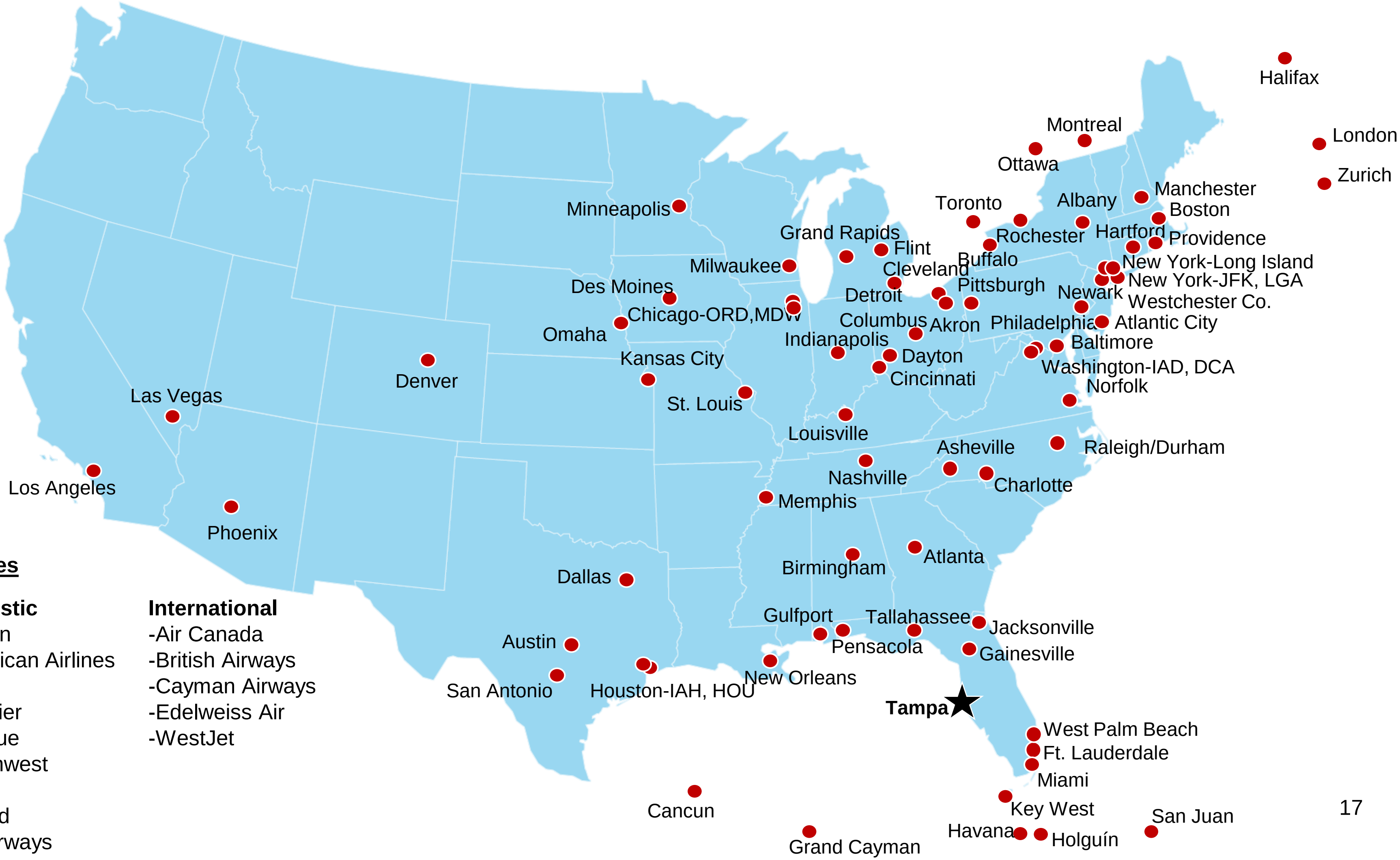


Note: Air cargo and Air Taxi included with domestic in historical data.

Facilities Planning

Tampa Enjoys Nonstop Service to 74 Destinations

10 International and 64 Domestic

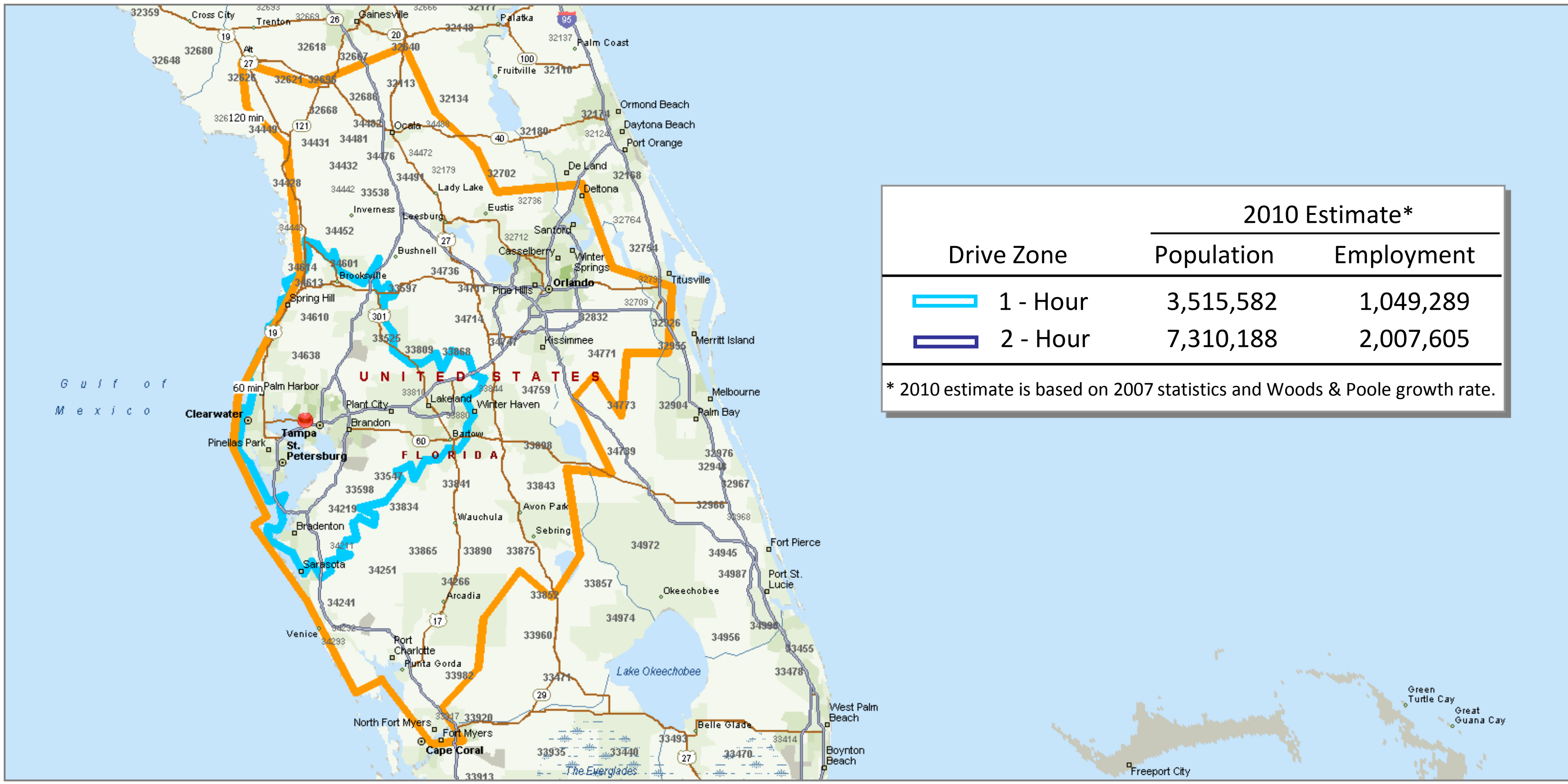


Airlines

Domestic
-Airtran
-American Airlines
-Delta
-Frontier
-JetBlue
-Southwest
-Spirit
-United
-USAirways

International
-Air Canada
-British Airways
-Cayman Airways
-Edelweiss Air
-WestJet

Over 7.3 Million People Live within a Two-Hour Drive of Tampa International Airport



Drive Zone	2010 Estimate* Population	Employment
1 - Hour	3,515,582	1,049,289
2 - Hour	7,310,188	2,007,605

* 2010 estimate is based on 2007 statistics and Woods & Poole growth rate.

Sources: Microsoft MapPoint North America 2010; Woods & Poole Economics, CEDDS 2011

Top 20 Population Areas According to Media Market Rankings - Population

Rank	Designated Market Areas	Population (000s)
1	New York, NY	20,811.6
2	Los Angeles, CA	17,895.1
3	Chicago, IL	9,774.0
4	Philadelphia, PA	7,851.2
5	San Francisco-Oakland-San Jose, CA	7,006.9
6	Dallas-Ft. Worth, TX	6,998.8
7	Atlanta, GA	6,571.2
8	Boston (Manchester), MA-NH	6,265.7
9	Washington, DC (Hagerstown, MD)	6,188.2
10	Houston, TX	6,137.8
11	Phoenix (Prescott), AZ	5,164.0
12	Detroit, MI	5,003.1
13	Seattle-Tacoma, WA	4,713.0
14	Minneapolis-St. Paul, MN	4,482.9
15	Tampa-St. Petersburg (Sarasota), FL	4,368.5
16	Miami-Ft. Lauderdale, FL	4,300.6
17	Sacramento-Stockton-Modesto, CA	4,055.7
18	Denver, CO	3,984.8
19	Cleveland-Akron (Canton), OH	3,852.1
20	Orlando-Daytona Beach-Melbourne, FL	3,723.5

Source: Sales and Marketing Management, 2009 Survey of Buying Power

Top 20 Population Areas According to Media Market Rankings – Effective Buying Income

Rank	Designated Market Areas	$ (000s)
1	New York, NY	527,472,673
2	Los Angeles, CA	372,103,655
3	Chicago, IL	218,943,285
4	San Francisco-Oakland-San Jose, CA	206,485,335
5	Washington, DC (Hagerstown, MD)	184,425,508
6	Philadelphia, PA	181,986,560
7	Boston (Manchester), MA-NH	165,594,170
8	Dallas-Ft. Worth, TX	154,216,873
9	Atlanta, GA	139,332,115
10	Houston, TX	129,690,773
11	Seattle-Tacoma, WA	118,275,553
12	Phoenix (Prescott), AZ	108,927,440
13	Detroit, MI	107,875,384
14	Minneapolis-St. Paul, MN	103,324,738
15	Tampa-St. Petersburg (Sarasota), FL	96,233,265
16	Denver, CO	93,663,315
17	Miami-Ft. Lauderdale, FL	89,188,970
18	Sacramento-Stockton-Modesto, CA	84,034,025
19	Orlando-Daytona Beach-Melbourne, FL	77,523,553
20	Cleveland-Akron (Canton), OH	77,303,288

Source: Sales and Marketing Management, 2009 Survey of Buying Power

Daily European Service Would Provide an Additional $154M Worth of Economic Impact and Create Over 1,200 Jobs for the Tampa Bay Region

Tampa Economic Impact of New Service to Europe
TPA – Europe Service

Total On-Airport/Direct	$17,476,138
Off-Airport/In-Direct	
Visiting Passenger Spending	$70,705,922
Food Expense	$1,060,696
Ad and Publicity Expense	$254,072
Total Off-Airport	$72,020,690
Total Direct + In Direct Impact	$89,496,827
Induced Impacts	
Assumed Multiplier	0.72
Multiplier Effect	$64,437,716
Total	$153,934,543

Europe

Impact Summary

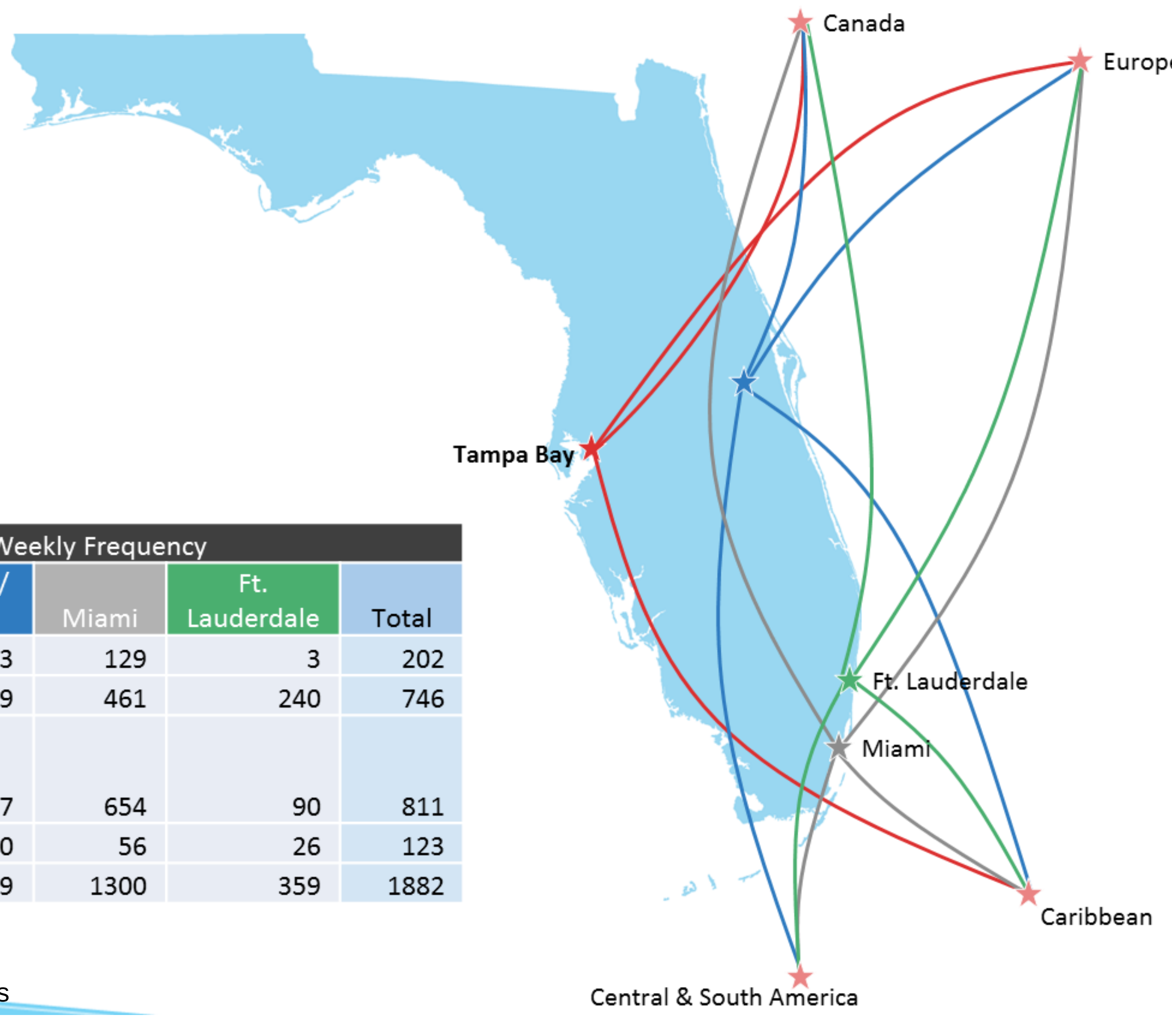
ImpactType	Employment	Labor Income
Direct Effect	**788**	**$26,098,000**
Spinoff	**497**	**$22,574,000**
Total Effect	1,286	$48,672,000

Source: ICF International; SH&E, an ICF International Company

Competitive Nonstop International Service

TPA and Other Florida Gateway Airports

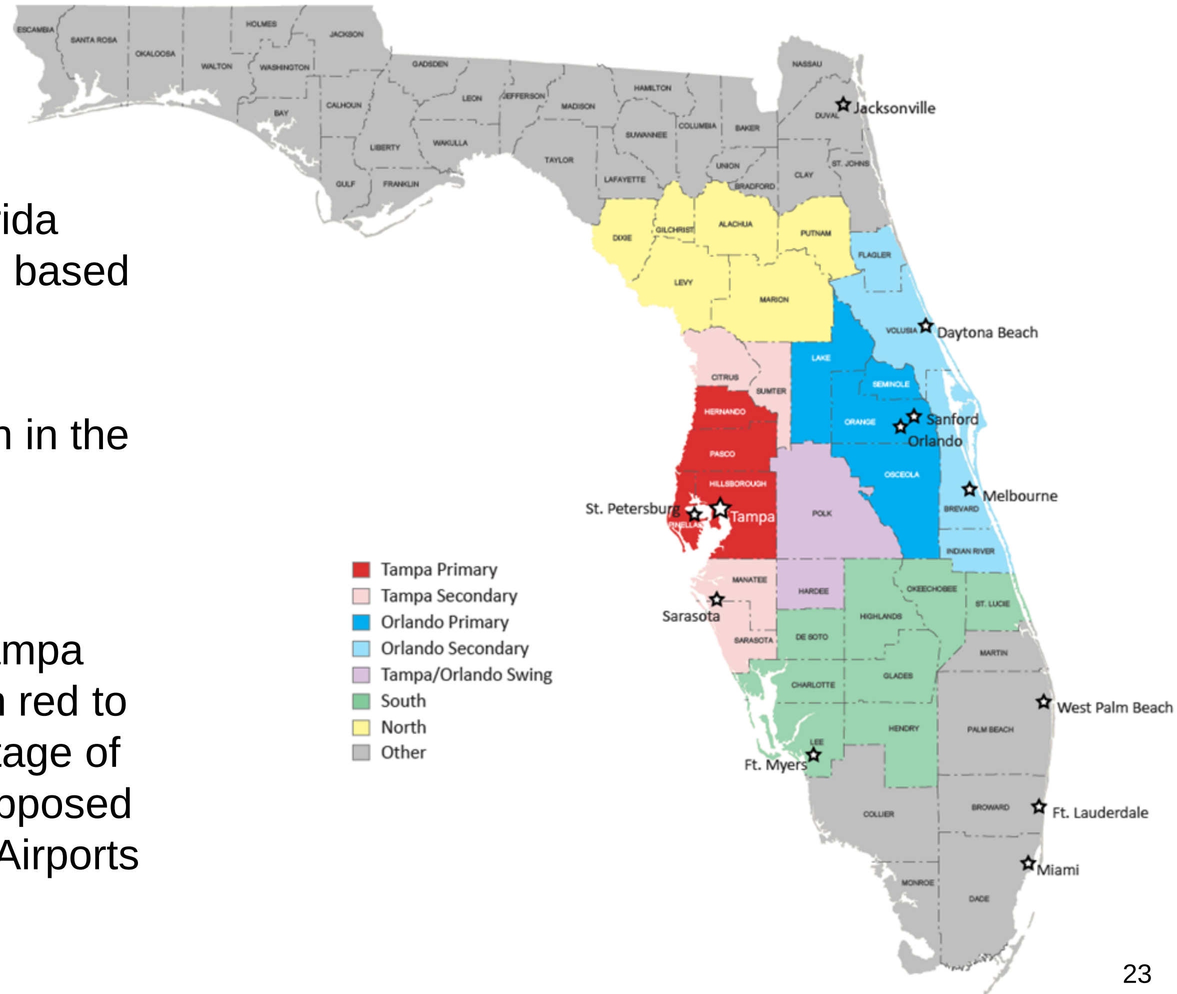
	Weekly Frequency				
Destination	Tampa	Orlando/ Sanford	Miami	Ft. Lauderdale	Total
Europe	7	63	129	3	202
Caribbean	6	39	461	240	746
Central & South America	-	67	654	90	811
Canada	11	30	56	26	123
Total	24	199	1300	359	1882



Source: OAG April-July 2011 Schedules

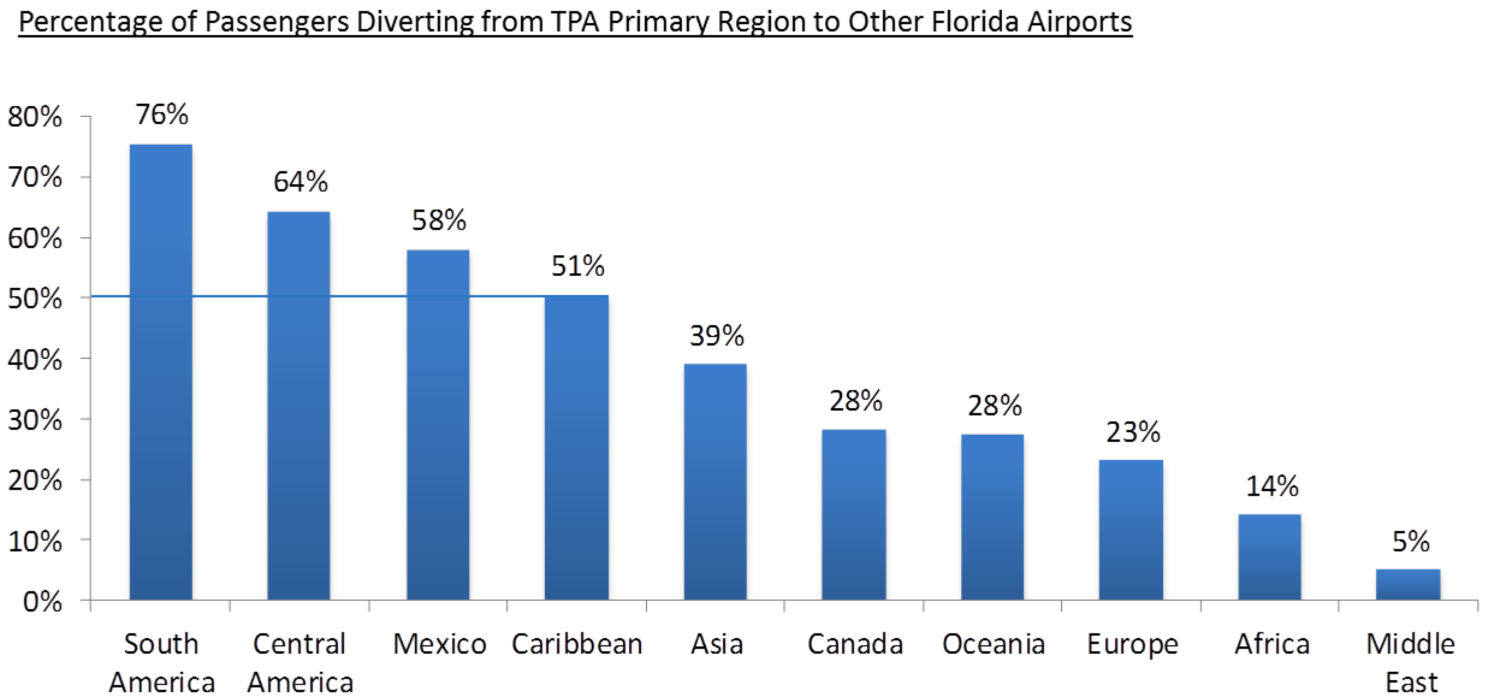
Catchment Areas Analyzed

- Our analysis divides Florida counties into six regions, based on their proximity to TPA
- These regions are shown in the map, and used in the subsequent analysis
- We would expect the "Tampa Primary" region shown in red to have the highest percentage of travelers using TPA as opposed to MCO or other Florida Airports



Summary of Diversion from TPA to Other Florida Airports

World Region Destination



International Growth Opportunities

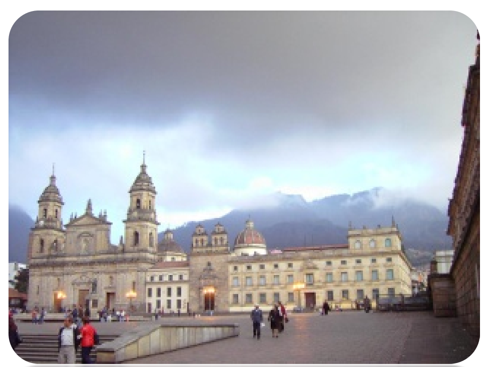
World Region Destination

Frankfurt
(Lufthansa / Condor)

Sao Paulo
(TAM)

Mexico City
(Volaris or Aeromexico)

Panama City
(Copa)



Bogota
(Avianca)

Island Destinations
(Southwest / AirTran)

Global Access is growing at Tampa International Airport

Our strategy is working: New service to new destinations over the past year

AirTran jetBlue AIRWAYS

Airtran and Jetblue offer 2x daily nonstop service
Beginning in April and May 2011
A passenger increase of 205% over one year ago

Flights began September 8th

3 carrier service providers serving the 3rd largest Cuban American market

BRITISH AIRWAYS

Effective March 27, 2011

Increase from 5 weekly departures to daily service

FRONTIER

Frontier Airlines adds three new destinations –
Omaha, Des Moines, and Kansas City

Winter seasonal service
Dallas / Fort Worth

edelweiss air

Service begins May 2012

2x weekly nonstop service to Zurich

jetBlue AIRWAYS

Service begins May 2012

2x daily service to La Guardia

jetBlue AIRWAYS

Service begins May 2012

1x daily service to Reagan National

spirit airlines

Service begins May 2012

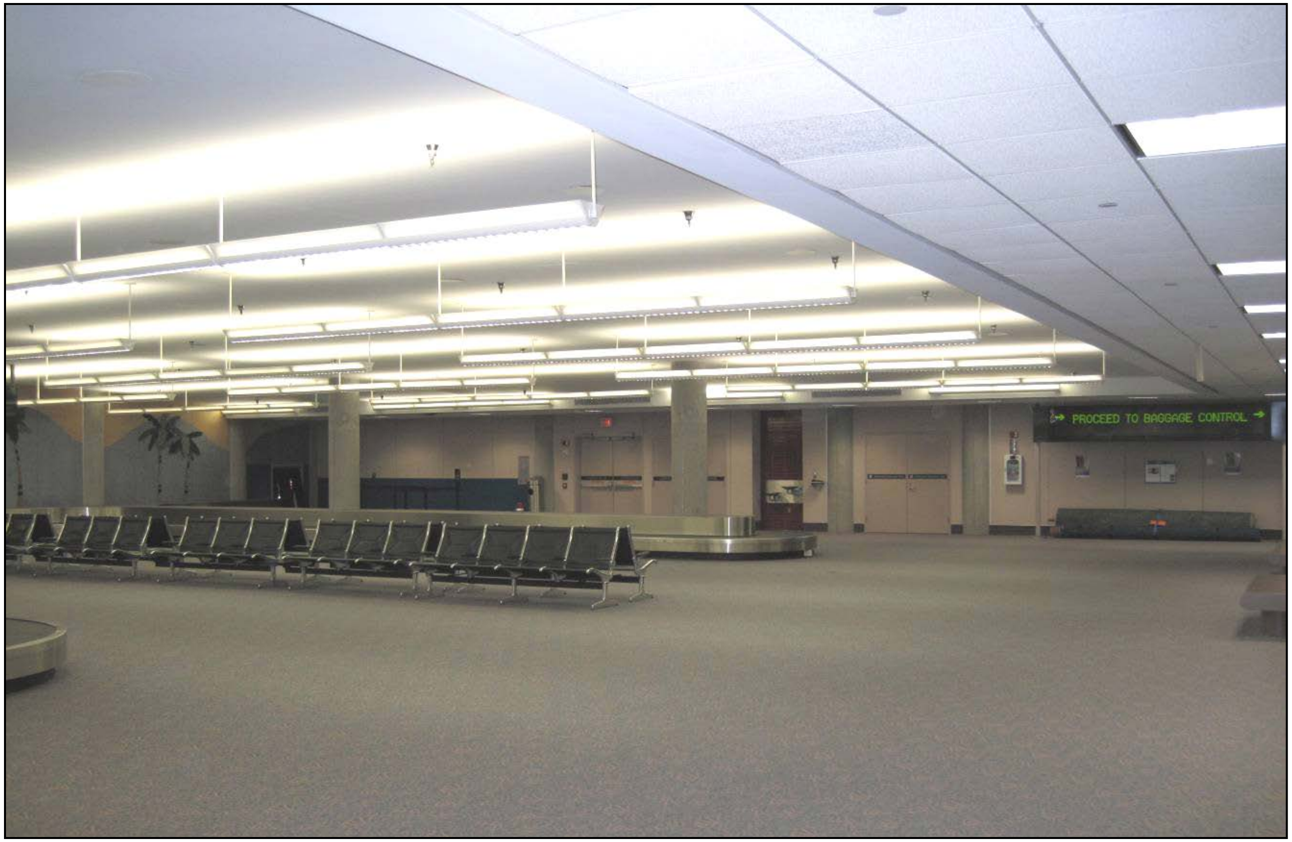
4x weekly service to Dallas / Fort Worth

Rental Car Facilities Congestion

Curbside Congestion

Transfer Level Improvements

International Terminal Improvements



International Terminal Improvements

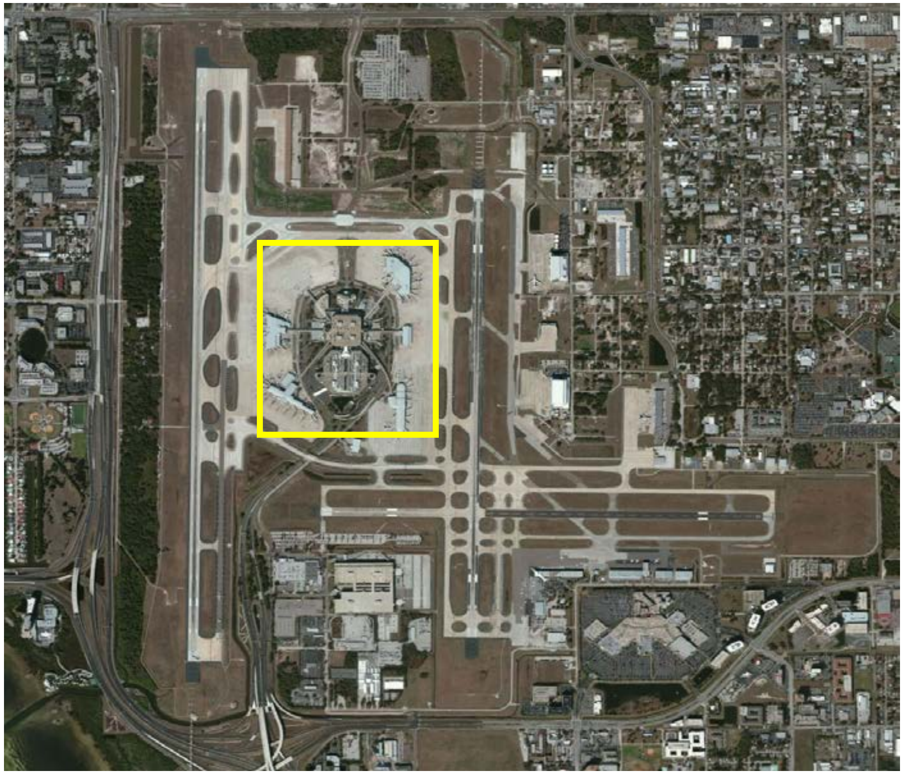
International Terminal Improvements

International Terminal Improvements

Passenger Facilities

Tasks In-Progress:

- Draft passenger forecast
- Staff, airlines, tenants and rental car company interviews
- Evaluate passenger check in performance
- Distribute questionnaires to tenants
- Collect field data on curbsides
- Identify rental car capacity concerns
- Common use feasibility study

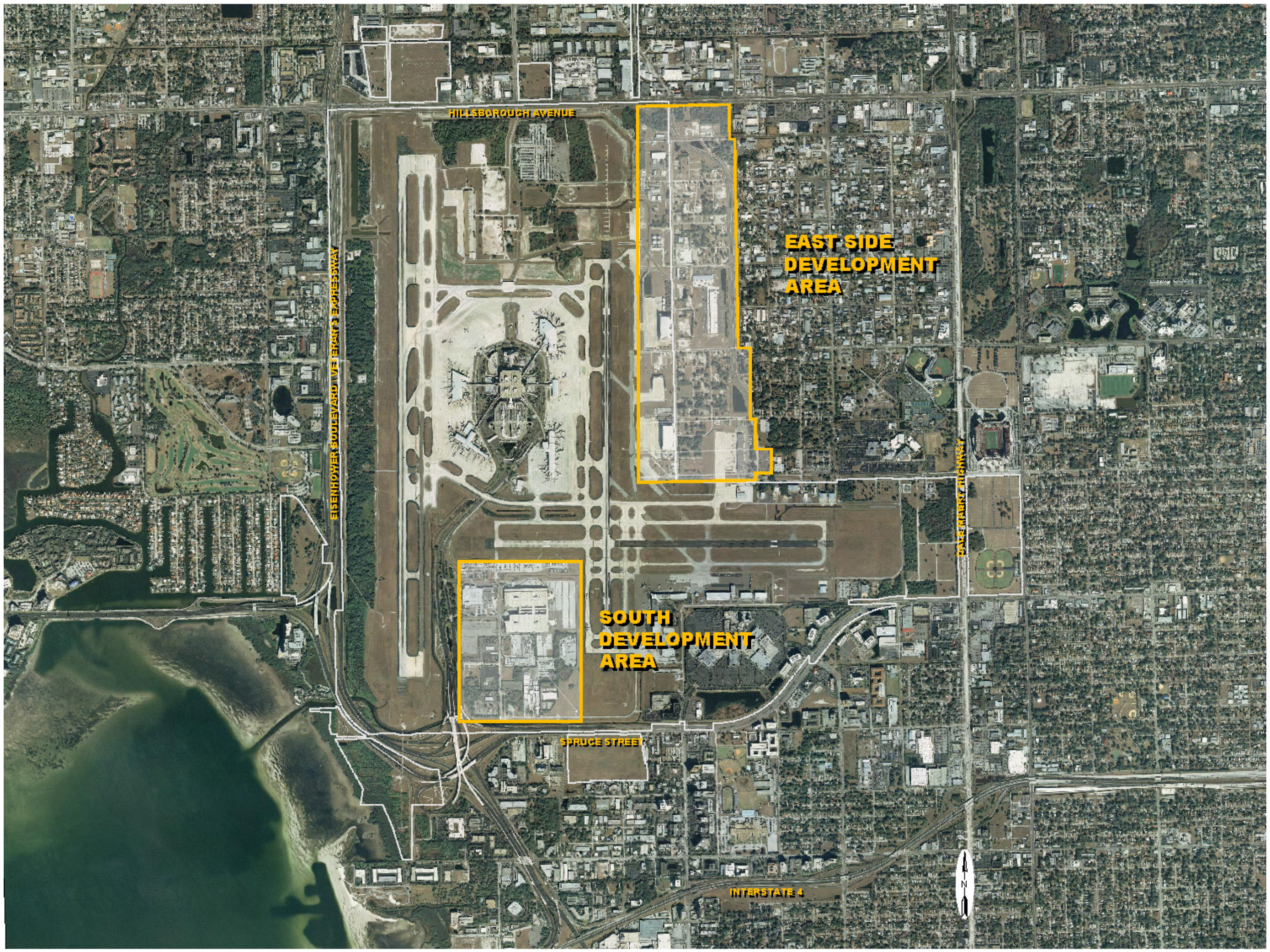


Study Objectives:

- Reduce curbside congestion
- Decongest main terminal transfer level
- Provide additional capacity for rental car growth
- Develop long term solution for International terminal

Land Use Planning

Real Estate Study



Land Use Principles Applied

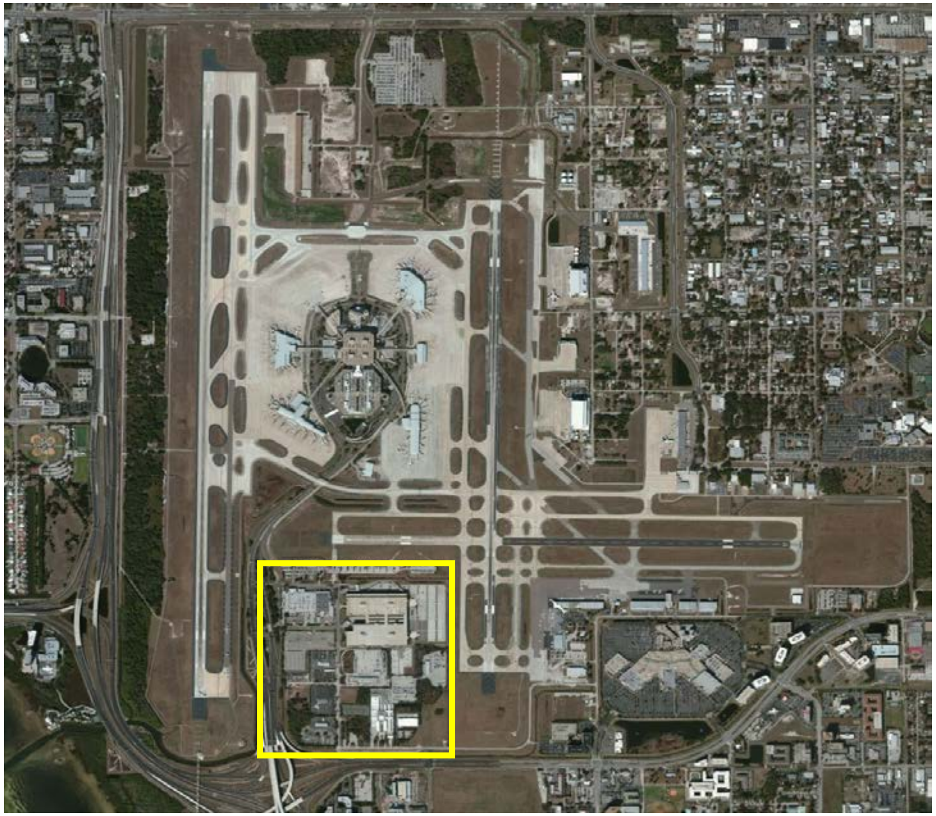
South Development Area

- FAA requires that property be used primarily for aviation related development
- Focus on expansion needs for public parking and rental car facilities
- Improve the efficiency of public ground transportation
- Accommodate regional transit and connect to an airport intra-modal system
- Explore selected development related to passenger convenience services
- Reuse existing infrastructure where possible

Land Use Planning: South Development Area

South Development Area Land Use Planning Objectives:

- Parking facilities
- Rental car expansion
- Accommodate regional transit and airport intra-modal connectivity
- Provide passenger convenience related development
- Improve ground transportation



"Flexible and Ready"

Land Use Principles Applied

East Side Development Area

- FAA requires property be used primarily for aviation related development
- Provide a variety of parcel sizes to meet demand
- Expansion of cargo and ground support equipment facilities
- Support for Aircraft Maintenance Repair and Overhaul (MRO) – cluster concept
- Explore selected development based on need to access the airfield
- Reuse existing infrastructure where possible

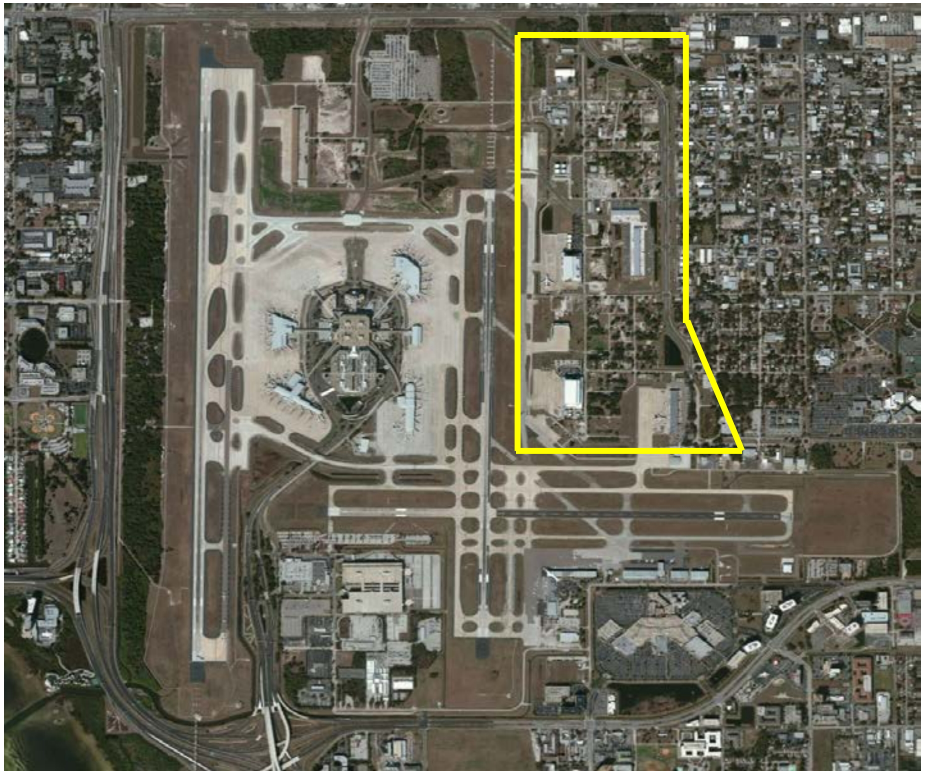
Land Use Planning: East Side Development Area

Tasks In-Progress:

- Tenant and local economic development agency interviews
- Develop site plan alternatives
- Market analysis

Market Analysis Highlights:

- Provide additional space for freight and belly cargo expansion
- Focus on growing the MRO business and supporting operations
- Develop aviation or other time sensitive manufacturing facilities
- Leverage economic development tools to grow the business



MRO Facilities

Transportation Planning

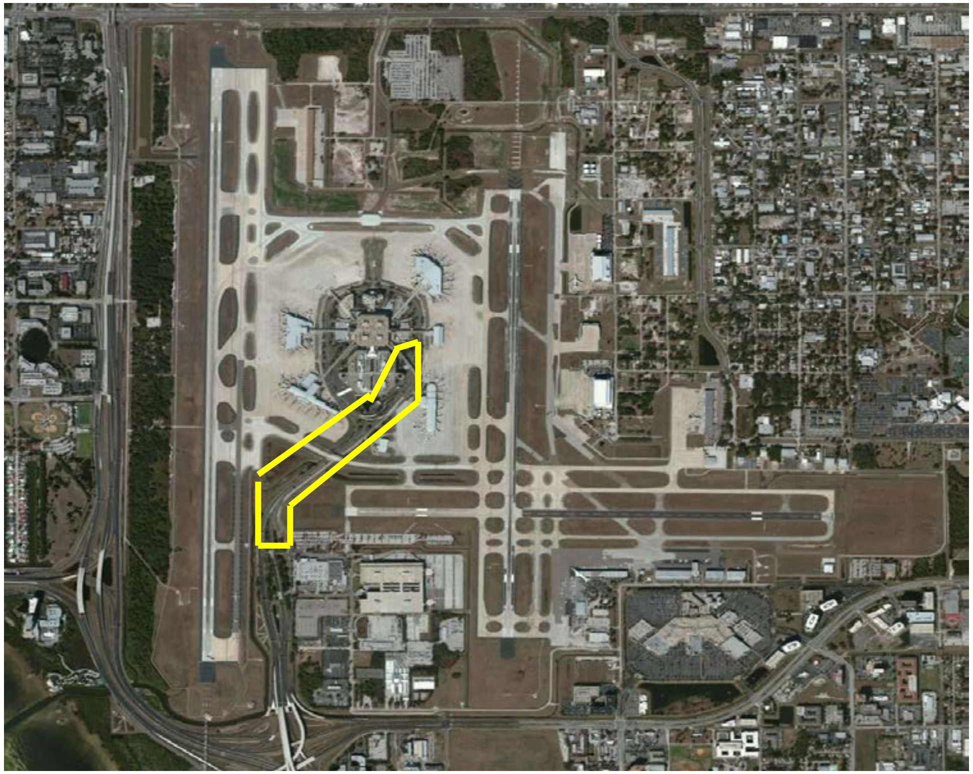
Transportation Corridor & Ground Access Analysis

Tasks In-Progress:

- Review recent studies
- Interviews with staff and other stakeholders
- Conduct assessments of people mover alignments
- Examine Runway 10-28 length and aircraft capability requirements based on potential people mover alignments

Study Objectives:

- Reduce congestion on the Parkway
- Improve customer experience
- Decongest main terminal curbside



Upcoming Planning Milestones

- Submission of draft aviation forecasts to FAA for review/approval
- Terminal facility needs, common use systems and development concepts
- Rental car facility requirements and expansion alternatives
- South area access and development concepts including airport intra-modal and regional multi-modal connectivity
- Airport intra-modal transportation corridor requirements and concept alternatives
- Land use recommendations for ancillary property

Conclusion

- Project Meeting Schedule:
  - 2nd public and stakeholder meetings: August 2012
  - Final public and stakeholder meetings: November 2012
  - Complete master plan: January 2013
- Questions
- Comments
  - Fill out comment cards and leave with staff
  - Go to HCAA website at www.tampaairport.com to submit comments