



GREATER ORLANDO
AVIATION AUTHORITY

2023 Strategic Plan Briefing to the Orange County Board of County Commissioners



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AVIATION AUTHORITY**

Introduction to the Strategic Plan

Strategic Planning Process

From the Airport Cooperative Research Program (ACRP) Report 20:

A process undertaken by an organization to define its future... and guide the organization from its current state to its vision for the future.



2013 Strategic Plan

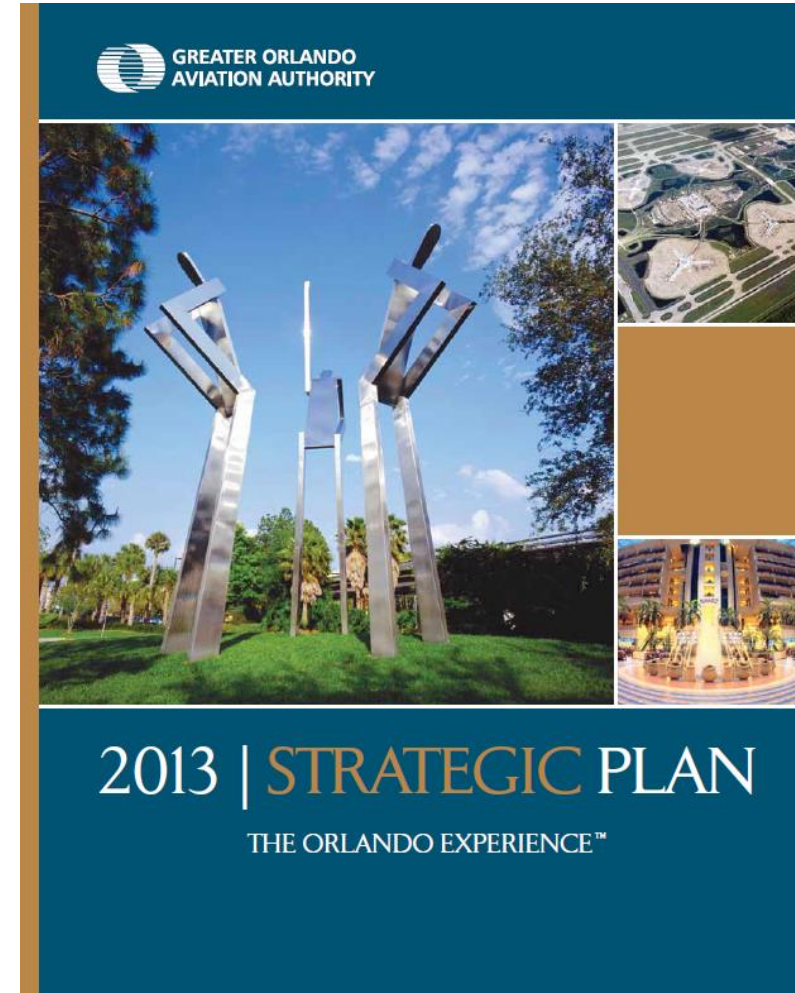
GOAA completed its “Strategic Plan” in 2013. The Strategic Plan articulated the Authority’s mission and vision statements, values, and four high-level strategic goals centered around

Customer Service

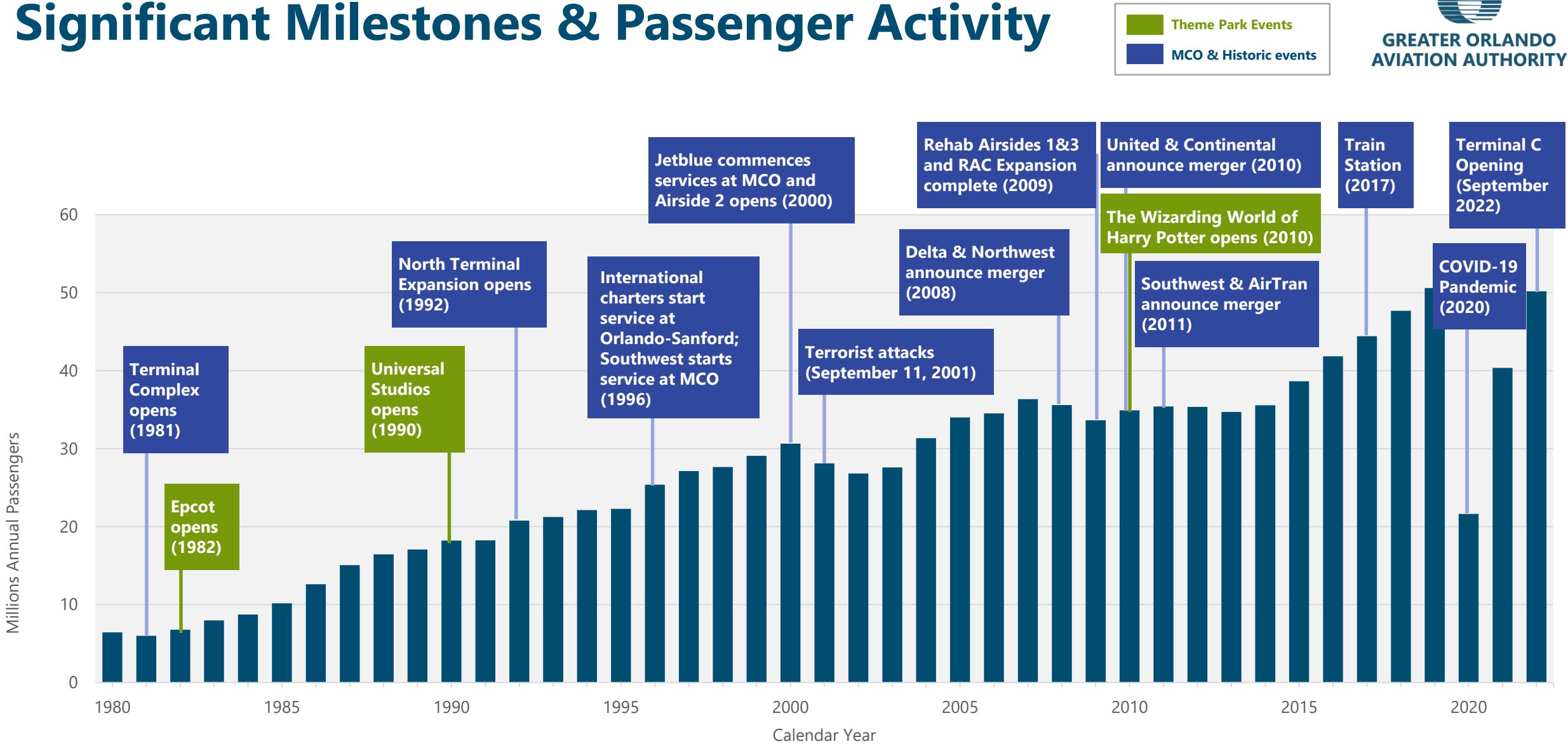
Economic Development

Safe and Secure Facilities

Fiscal Responsibility



Significant Milestones & Passenger Activity



Sources: LFA Report; GOAA Website; FAA 2016 and 2017 TAF (CY)
Note: Indicates national recession during all or part of the year, according to the National Bureau of Economic Research. The FAA TAF is in fiscal year but was converted to calendar year for comparison. The FAA TAF forecast does not include nonrevenue passengers; 2012 – 2017 passenger data were provided by GOAA, all other passenger data were retrieved from LFA Report

The Central Florida MSA Economy Is Robust and Growing



POPULATION

3.36M → 4.41M
2022 BY 2042
1.4%
20 yr. CAGR



PER CAPITA PERSONAL INCOME

\$109,613 → \$281,142
2022 BY 2042
4.8%
20 yr. CAGR
In 2022 \$



EMPLOYMENT

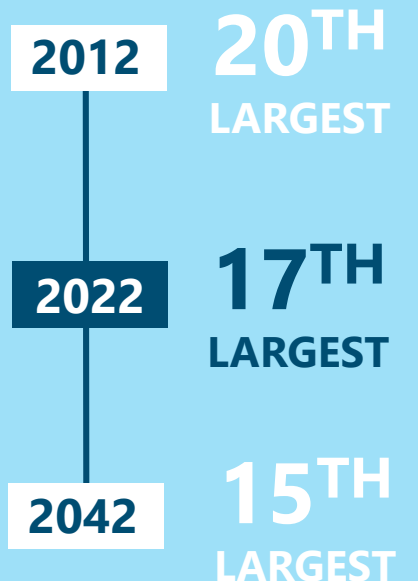
2.20M → 3.22M
2022 BY 2042
2.0%
20 yr. CAGR



GROSS REGIONAL PRODUCT

\$172B → \$309B
2022 BY 2042
3.0%
20 yr. CAGR
In 2012 \$

Central Florida MSA Ranking



Note: MSA – Metropolitan Statistical Area; CAGR – Compound Annual Growth Rate. Central Florida MSA includes Orlando and Melbourne MSA combined
Sources: Woods & Poole Economics, Inc. Moody's Analytics, June 2022.

Industry Snapshot

DEMAND

COVID-19	Mergers and Acquisitions	Airline Capacity Discipline	ULCCs
Great Recession Recovery	Basic Economy Fares	Ancillary Fees	Pilot Shortage

TECHNOLOGY

Security Screening	Electrification	APM Technology	Smartphones
Data Privacy	Social Media	Big Data	Digital Twins

OPERATIONS

TNCs	Airline fleets	AAM
Resiliency	Facility Flexibility	Other Disruptors

BUSINESS

Public-Private Partnerships	E-Commerce
Cold Storage	Belly Cargo

REGULATION

Industry Guidance/Standards	NextGen	Land Use and Section 163
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What are other airports talking about?



2023 Strategic Plan



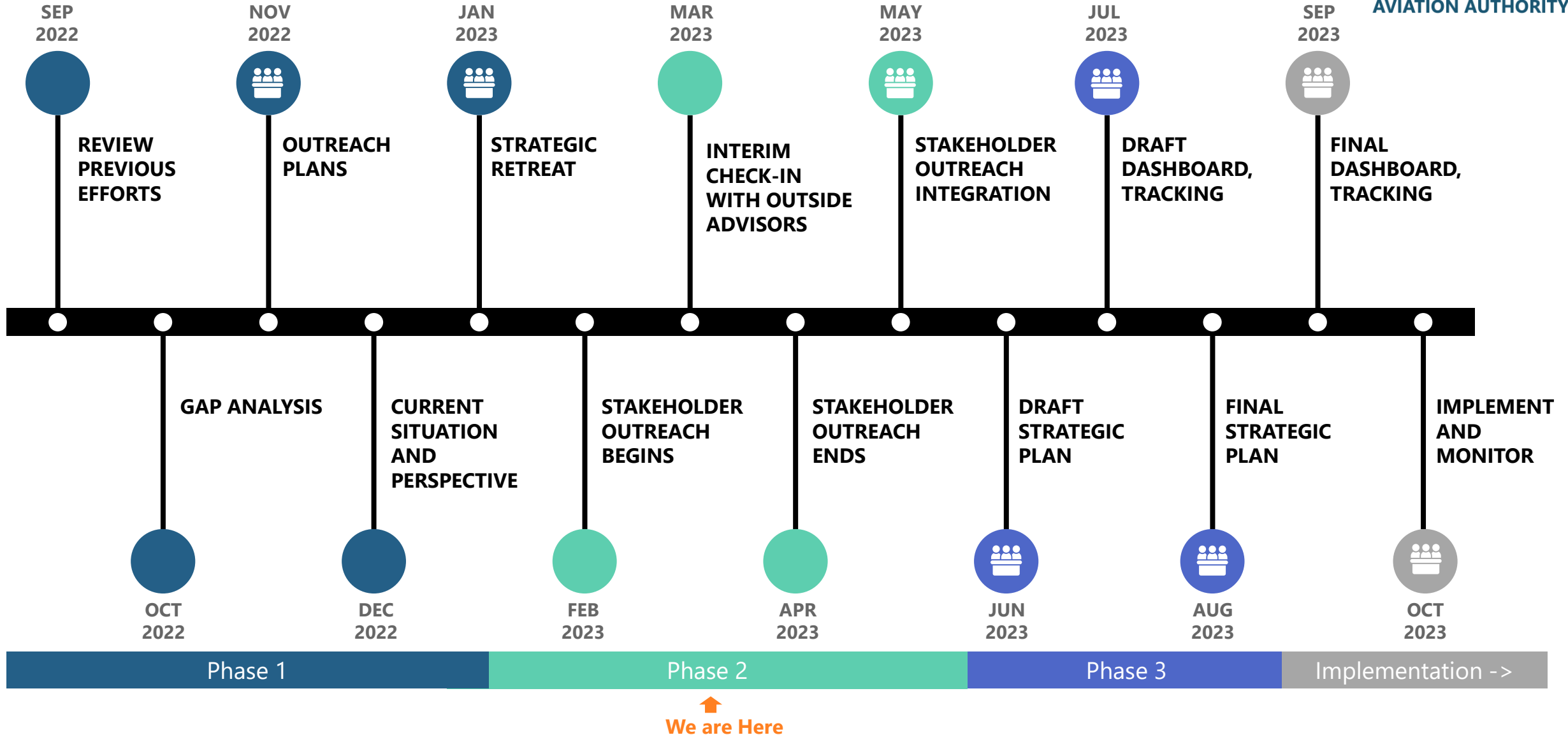
Vision Became Reality!

What's Next?

2023 | STRATEGIC PLAN

The Orlando Experience™

Approach and Milestone Schedule





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Stakeholder Survey Input into GOAA's Strategic Plan

How can you contribute to GOAA's Strategic Plan?

GOAA's leadership asks that you adopt the mindset and characteristics identified below when considering your responses to the survey questions:

UNCONSTRAINED

Bold

Challenging

Aspirational

Transformative

Fearless

Candid

Creative



Help develop a vision for the organization that reflects GOAA's potential for growth and positive impacts regionally and globally.



Aim for the ceiling, not the floor.



Focus is on leading, not on following

Access to the Stakeholder Survey

Please take this opportunity to make a positive impact on our organization! We greatly value your perspective and look forward to hearing from you. Thank you for your participation and support!

The survey will be open through April 21, 2023. If you have additional questions and/or comments, please submit them to:

strategicplan@goaa.org

**2023 Strategic Plan
Survey Link**



<https://orlandoairports.net/survey-1/>