

welcome to

FALL

Tourism Sales Market Update

**Presented by:
Broward County Aviation Department
September 20, 2019**

Agenda

- **FLL Today – Airport Overview**
- **“By the Numbers”**
- **Domestic and International Air Service Portfolio**
- **Delivering a Better Guest Experience**
- **Master Plan at a Glance**
- **Q&A**

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Airport
Overview



Airport Overview



- **Passenger Terminal Complex**
 - 4 Terminals/7 concourses - 64 air carrier gates
 - 3 Parking Garages
 - 2 Parallel air carrier runways
 - 30 Airlines
 - 2 New FIS facilities
 - 100 New food and retail concessions
- **On-Airport Rental Car Facility**
 - All major rental car companies
 - Minutes away from the terminals
 - Convenient shuttle service
- **FLL's Top Three Airlines**
 - 65% of FLL's passengers
 - No dominant carrier
 - Low cost carriers keep air fares down
(FLL's domestic base fare is the lowest among Large Hub U.S. airports*)

*U.S. DOT Origin/Destination Data



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“By the Numbers”

“ By the Numbers”

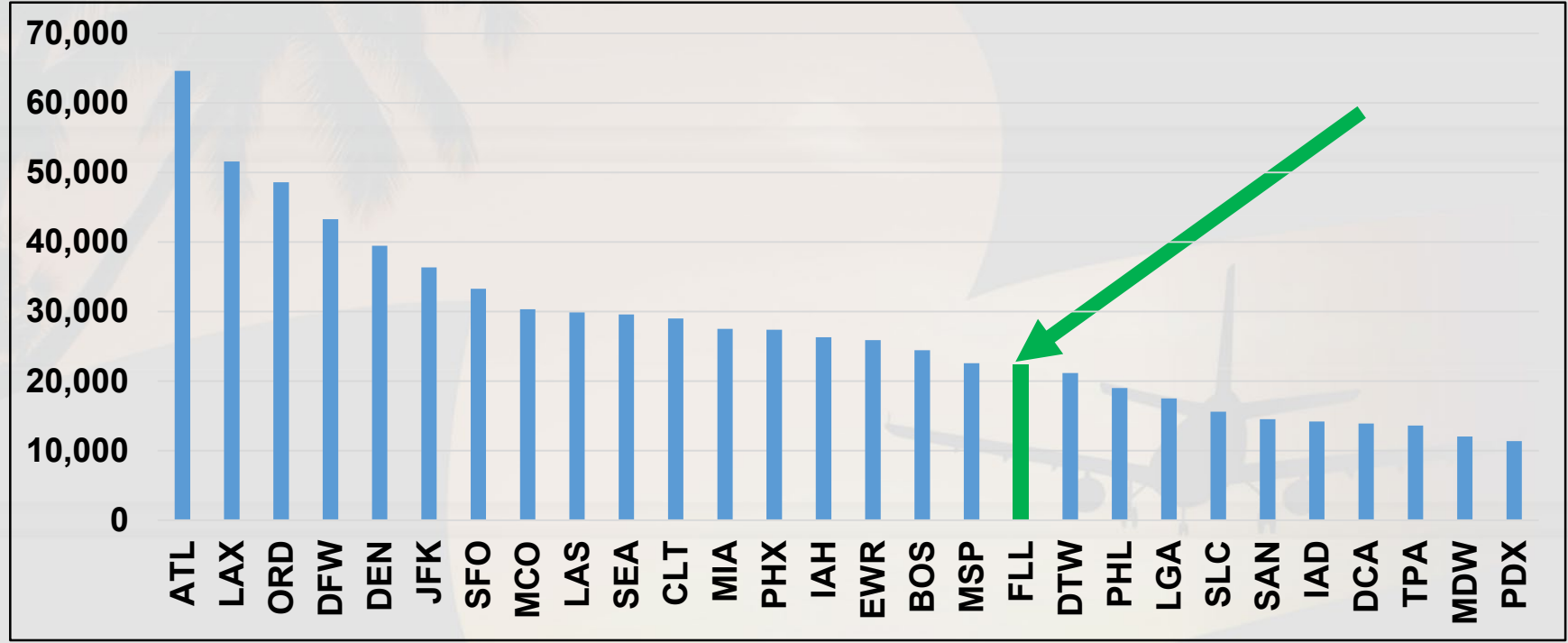


- **In 2018, FLL was the fastest growing Large Hub airport in the U.S. with 35.9M passengers, up 10.6%. (Airports Council International ((ACI)) data)**
- **2019 Jan-Aug total traffic was 25.3M, up 2.5%.**
- **According to Airports Council International data, FLL ranks**
 - **18th in total passenger traffic.**
 - **10th in international passengers, more than Phoenix, Salt Lake City, LaGuardia, Washington National and Detroit.....combined.**
- **FLL has had 5 consecutive years of double digit growth in international traffic.**
- **84% of FLL's passengers begin or end their flight here.**
- **Due to Hurricane Dorian, there were 1,164 flight cancelations from Aug 31-Sep 6. That's a loss of approximately 180,000 seats which equates to about 153,000 passengers.**

“ By the Numbers”



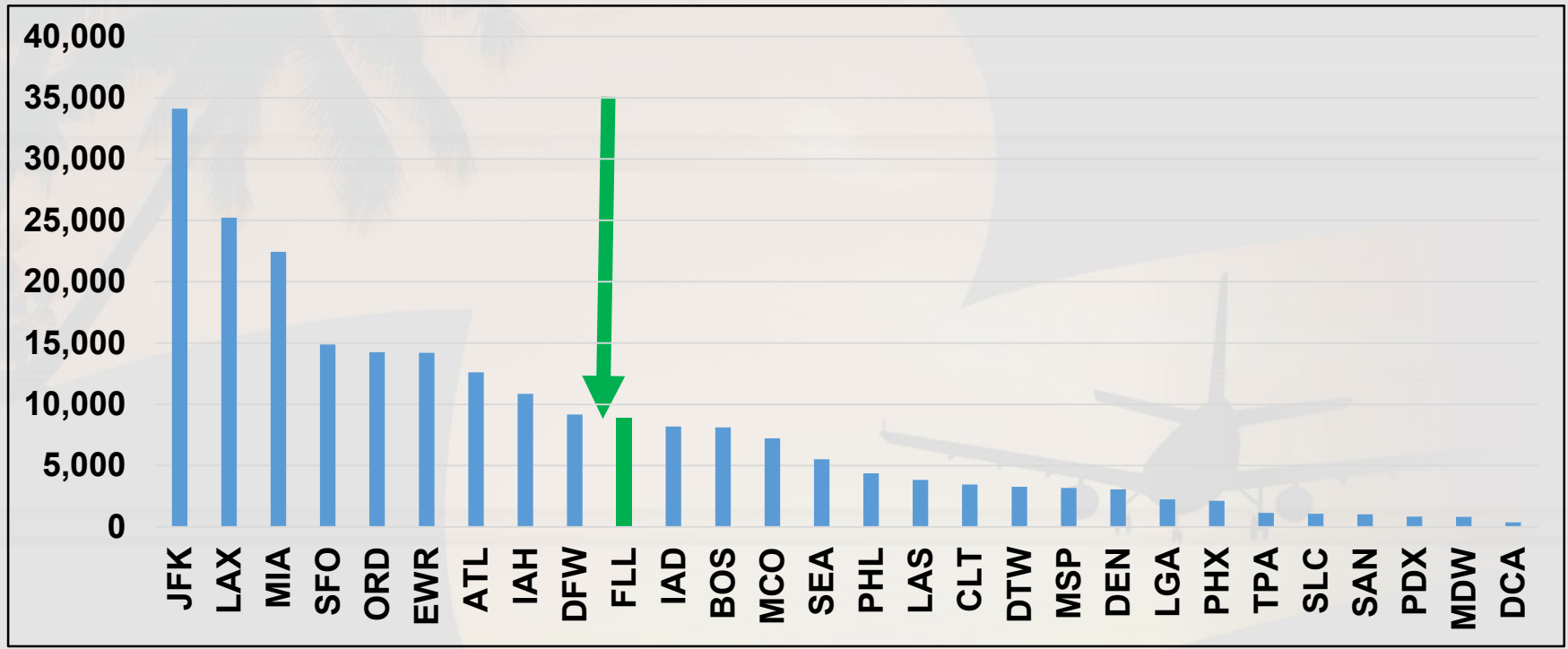
FLL is the 18th Busiest Large Airport in the U.S (ACI Data Jan-Jul 2019)



“ By the Numbers”

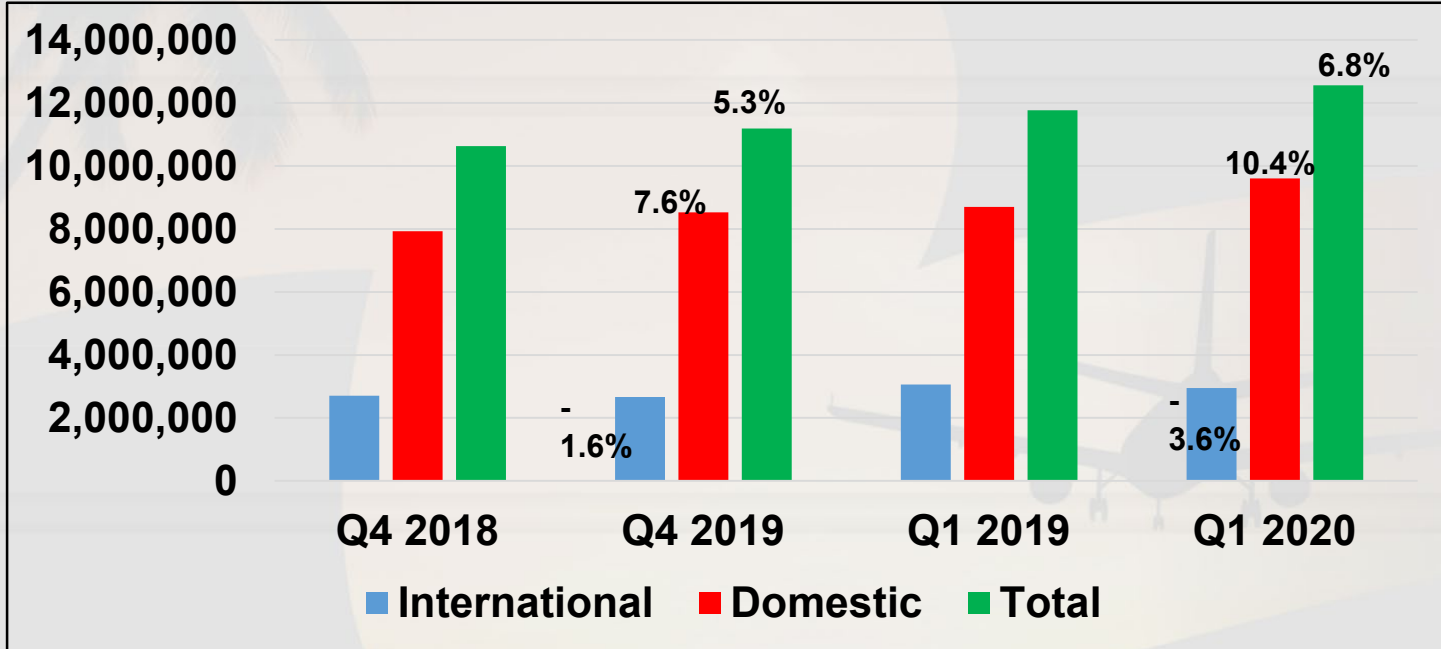


FLL Ranks 10th in International Traffic (ACI Data Jan-Jul 2019)





Busy Season Scheduled Seat Comparison

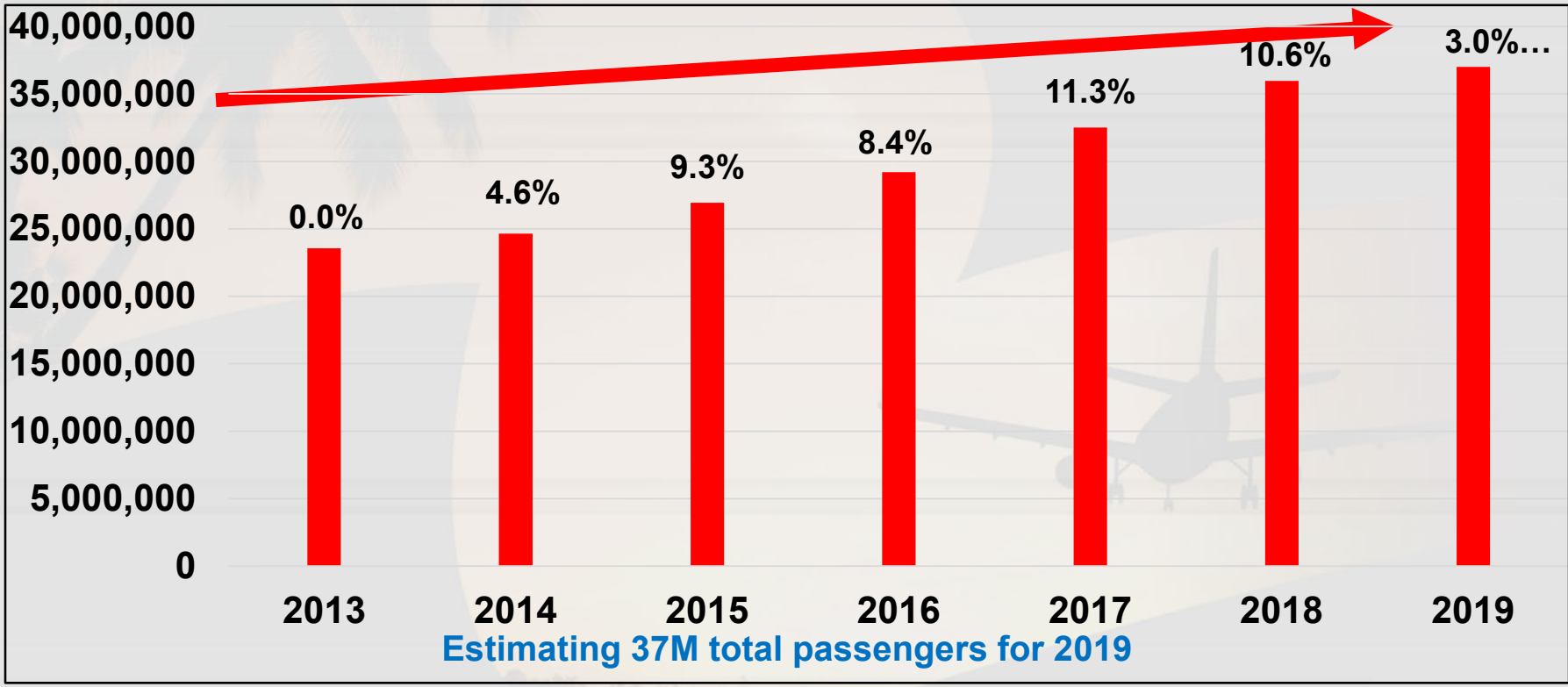


- Reductions by Norwegian and the departure of BA equate to the loss of over 2,000 international seats daily
- Canadian seats up 12.4% for Q4/2019 and 13.3% for Q1/2020

“ By the Numbers”



Passenger traffic has increased by over **13M** passengers since 2013, up 57%



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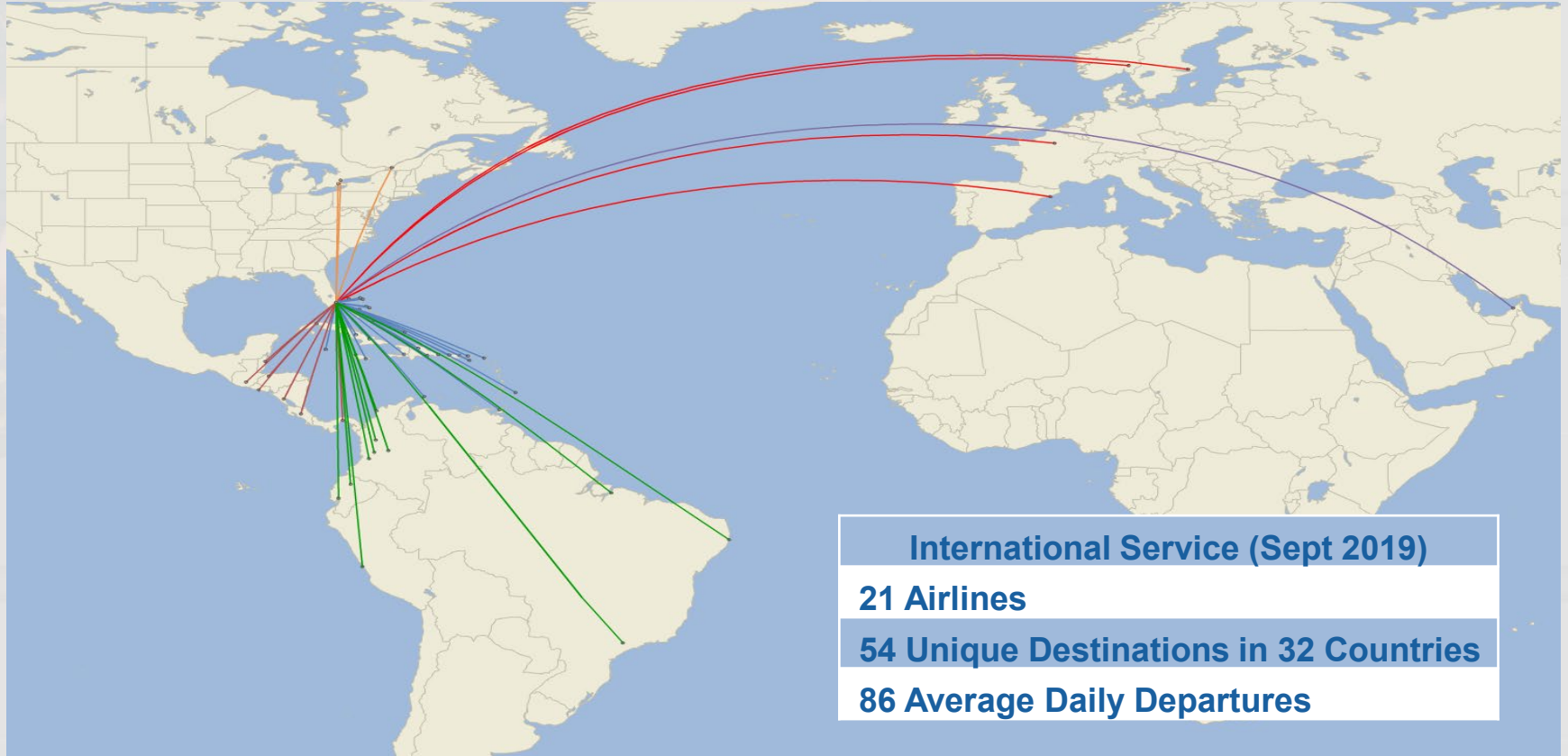
**Domestic and International
Air Service Portfolio**

Domestic Air Service

BROWARD
COUNTY
FLORIDA



International Air Service



Air Service...so far in 2019





Top 20 Domestic and International O/D Markets CY 2018

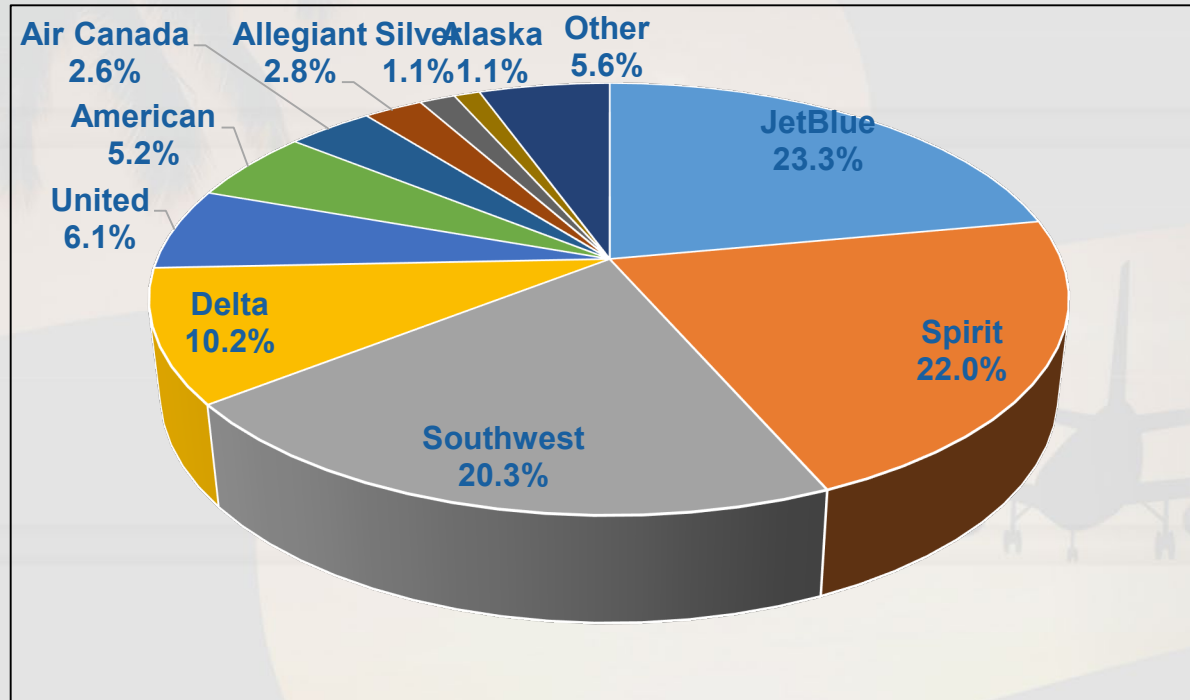
NY Metro Area	16.5%
Baltimore/Wash	8.3%
Chicago	5.0%

Domestic	% Share	International	% Share
Newark, NJ, US	6.4%	Toronto, ON, CA	6.9%
New York-La Guardia, NY, US	5.7%	Montreal-PET, QC, CA	6.8%
Atlanta, GA, US	5.1%	Nassau, BS	6.2%
New York-JFK, NY, US	4.4%	Port Au Prince, HT	5.6%
Baltimore, MD, US	4.3%	Kingston, JM	4.0%
Boston, MA, US	3.6%	Havana, CU	3.5%
Chicago-O'Hare, IL, US	3.5%	Montego Bay, JM	3.5%
Philadelphia, PA, US	3.2%	San Jose, CR	3.4%
Detroit, MI, US	3.2%	Cancun, MX	3.1%
Los Angeles, CA, US	2.4%	Santo Domingo, DO	2.8%
San Juan, PR, US	2.3%	Bogota, CO	2.7%
Denver, CO, US	2.0%	London-Gatwick, EN, GB	2.3%
Washington-National, DC, US	2.0%	Mexico City, MX	2.0%
Dallas/Fort Worth, TX, US	2.0%	Port of Spain, TT	1.8%
Hartford, CT, US	1.7%	Punta Cana, DO	1.6%
Nashville, TN, US	1.6%	Quito, EC	1.5%
Las Vegas, NV, US	1.6%	Guayaquil, EC	1.4%
San Francisco, CA, US	1.6%	Medellin, CO	1.3%
Chicago-Midway, IL, US	1.5%	Paris-De Gaulle, FR	1.3%
New Orleans, LA, US	1.5%	Cartagena, CO	1.3%

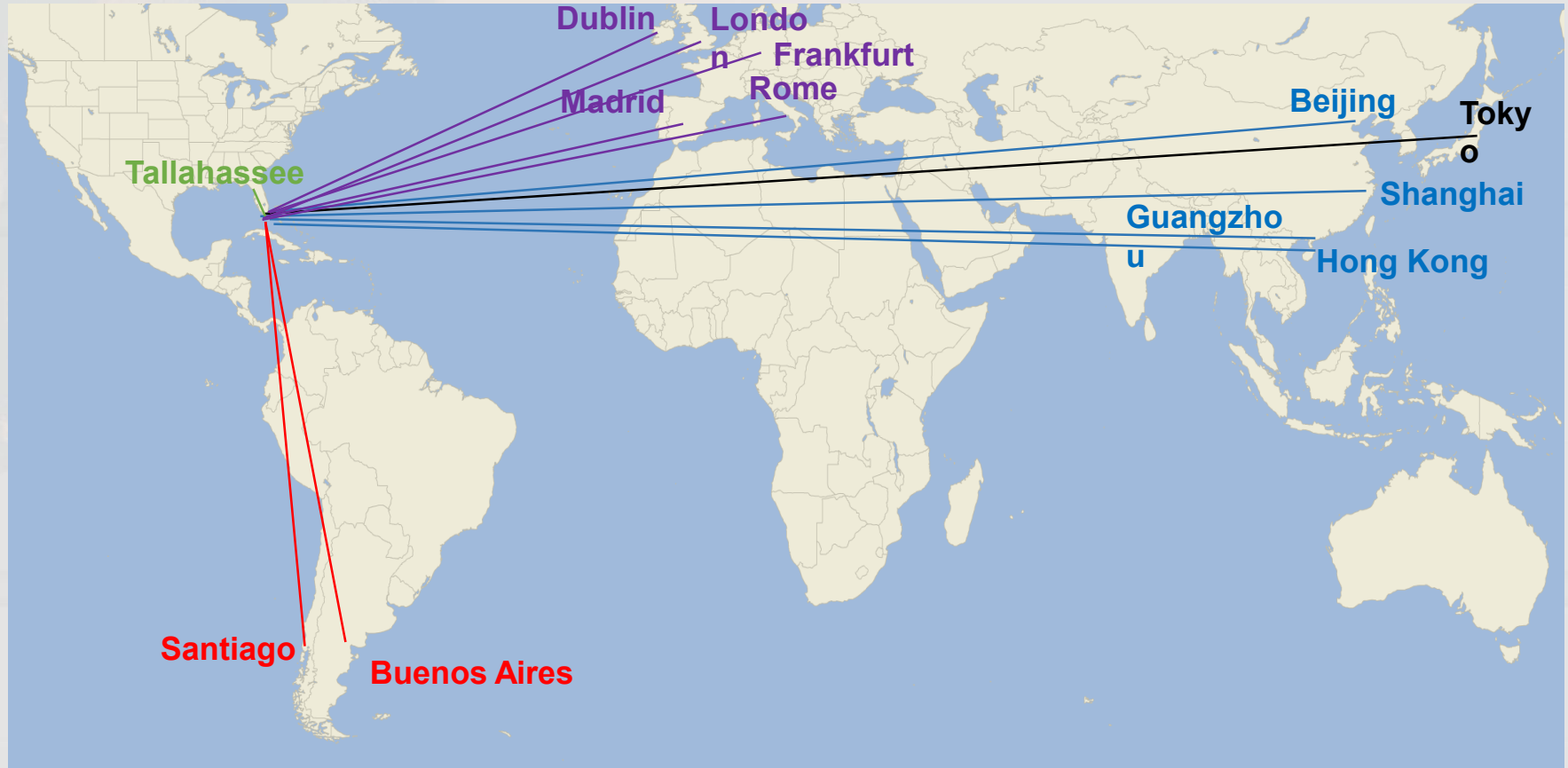
Canada	19.5%
Bahamas	9.0%
Jamaica	7.5%
Colombia	6.0%
Cuba	5.9%
Haiti	5.6%
Mexico	5.6%
Dominican Republic	5.5%
Brazil	3.9%
Costa Rica	3.5%



Top 10 Airlines Market Share Jan-Jul 2019



FLL's Top Target Markets

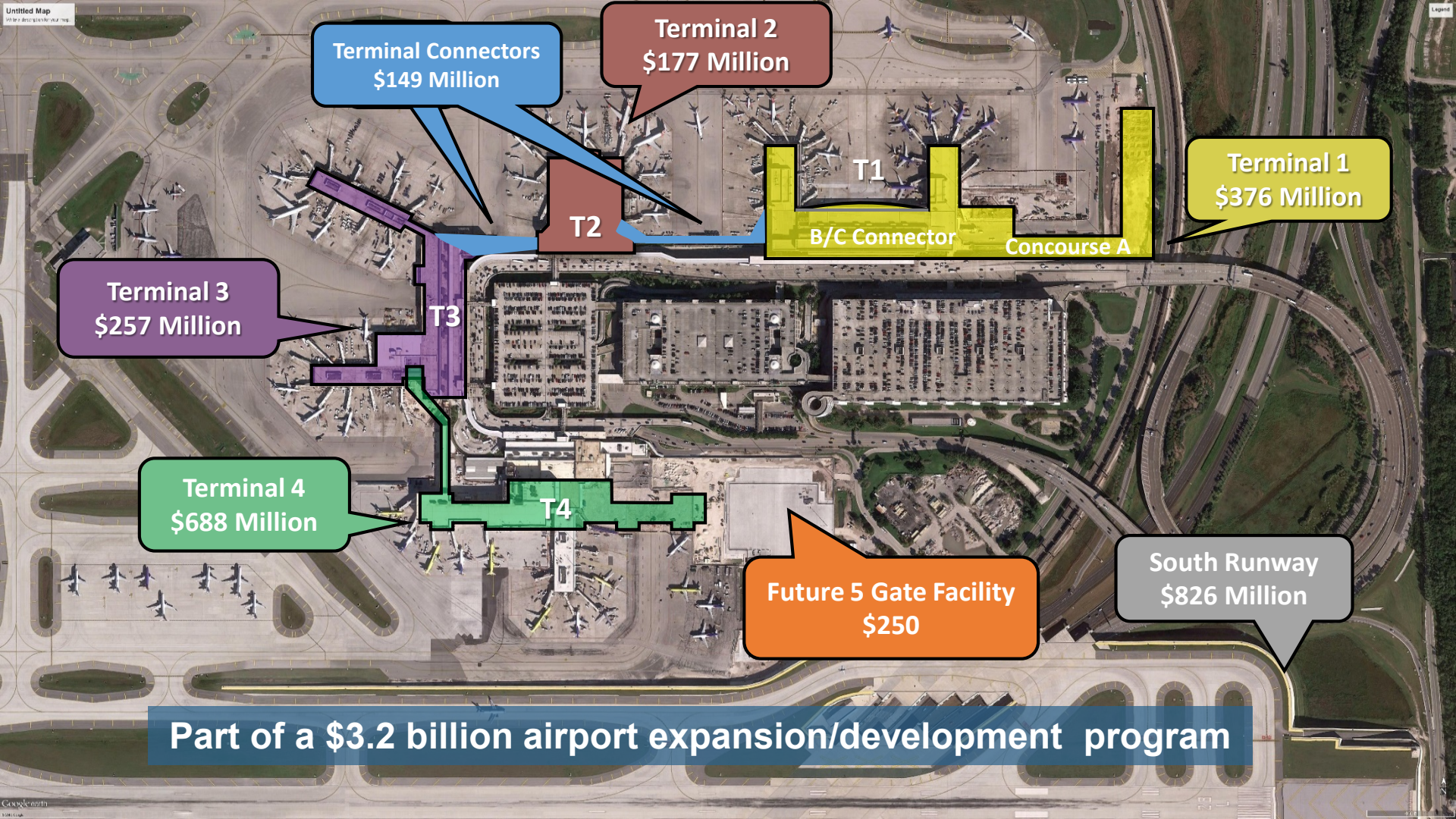


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Delivering a Better Guest Experience
Through New and Renovated Facilities



Terminal Connectors
\$149 Million

Terminal 2
\$177 Million

Terminal 1
\$376 Million

Terminal 3
\$257 Million

Terminal 4
\$688 Million

Future 5 Gate Facility
\$250

South Runway
\$826 Million

Part of a \$3.2 billion airport expansion/development program

Delivering a Better Guest Experience



Terminal 1 Modernization

Concourse A



B/C Connector



Delivering a Better Guest Experience



B/C Connector – Airside



Delivering a Better Guest Experience



Terminal 2 Modernization



Delivering a Better Guest Experience



Terminal 2 Modernization



Delivering a Better Guest Experience



Terminal 3 Modernization



Broward County Public Art Project
“Rainbow’s End”

Delivering a Better Guest Experience



Terminal 3 Future Connector



Delivering a Better Guest Experience

Terminal 4 Concourse G



Delivering a Better Guest Experience



Terminal 4 Modernization

Concourse G East



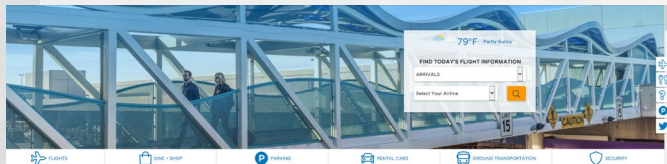
New International Meet/Greet Lobby Opening Later this Year



Delivering a Better Guest Experience



Through Innovation, Great Shops, and Customer



User Friendly Website
Easy to Navigate



Friendly Service



Focus
Parking



Super Shopping



Delicious Dining Choices



Master Plan at a Glance

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Thank You

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