

Fort Lauderdale-Hollywood International Airport September 2019

2018 Airports Council International U.S. Rankings

- MCO - 10th/47.7M total passengers (34th worldwide)
- MIA - 13th/45.0M total passengers (42nd worldwide)
- FLL - 18th/35.9M total passengers (59th worldwide)
- TPA - 28th/21.3M total passengers (121 worldwide)

September 2019 Passenger Traffic

- Total traffic: 2,192,688, down -9.4%
- Domestic traffic: 1,676,264, down -8.7%
- International traffic: 516,424, down -11.5%
- YTD total traffic: 27,502,786, up 1.4%

Impacts to Passenger Traffic for September

- There were approximately 1,200 flight cancelations in the beginning of the month due to Hurricane Dorian.
- Additionally, Freeport, Marsh Harbor and Treasure Cay airports are still closed to commercial operations. As a result, FLL continues to lose over 500 seats per day.
- Reductions by Norwegian and the departure of British Airways in early September equate to a loss of over 2,000 international seats daily, which has had a significant impact on international passenger traffic

FLL's Top 10 Carriers Jan-Sep Traffic and Market Share

| Name | 2018 | 2019 | % Change | % Share 2019 |
|-------------------|-------------------|-------------------|--------------|---------------|
| JetBlue | 6,586,630 | 6,551,852 | -0.5% | 23.8% |
| Spirit | 5,484,957 | 6,151,262 | 12.1% | 22.4% |
| Southwest | 5,736,896 | 5,448,866 | -5.0% | 19.8% |
| Delta | 2,656,104 | 2,828,042 | 6.5% | 10.3% |
| United | 1,658,659 | 1,622,273 | -2.2% | 5.9% |
| American | 1,586,537 | 1,440,017 | -9.2% | 5.2% |
| Allegiant | 665,144 | 748,111 | 12.5% | 2.7% |
| Air Canada | 636,771 | 661,939 | 4.0% | 2.4% |
| Norwegian | 332,108 | 308,699 | -7.0% | 1.1% |
| Silver | 318,832 | 288,874 | -9.4% | 1.1% |
| Sub Total | 25,662,638 | 26,049,935 | 1.5% | 94.7% |
| Other | 1,448,666 | 1,452,851 | 0.3% | 5.3% |
| Total | 27,111,304 | 27,502,786 | 1.4% | 100.0% |

Airports Council International Report for YTD August 2019

- FLL ranked 18th in total traffic
- Ranked 10th in international traffic

New Service on the Books for 2019

- October - Spirit to Nashville
- November - Swoop to Winnipeg, Canada; Frontier to Cleveland and Cincinnati; Southwest to Cleveland, Louisville, and Boston (Southwest is all seasonal)
- December - Air Transat to Vancouver, Canada and Azul to Belo Horizonte, Brazil

Fort Lauderdale-Hollywood International Airport September 2019

Other Airline Developments

- B737Max update
 - American, WestJet and United have taken the aircraft off the schedule through January 2020.
 - Air Canada and Southwest have taken it off through mid-February 2020.
- Norwegian Air and JetBlue Airways plan a partnership enabling passengers flying between Europe and the United States to continue to multiple destinations under a single booking, potentially boosting traffic and average fares. Norwegian said it expected the partnership to launch early in the summer of 2020 and be bookable “in early 2020”.

Canadian Outlook for the Season

- Canadian scheduled available seats: Q4/2019 up 13.3%, Q1/2020 up 11.4%

Outlook for 2019

- Passenger traffic should begin to improve for the remainder of 2019. Scheduled available seats for October thru December show an average growth rate of approximately 5%. Below is a chart that depicts the seat comparison and % change year-over-year. Passenger traffic for 2019 is expected to approach 37M, up approximately 2.5% over 2018.

| | Oct | Nov | Dec |
|-----------------|------------------|------------------|------------------|
| | Seats | Seats | Seats |
| 2018 | 3,233,098 | 3,527,228 | 3,867,738 |
| 2019 | 3,294,168 | 3,702,154 | 4,109,582 |
| % Change | 1.9% | 5.0% | 6.3% |