



**Broward Workshop**  
**Advisory Group Meeting**  
January 14, 2013

Presented by:  
Kent George, Director of Aviation,

Your gateway to South Florida's lowest fares.



## FLL in Perspective

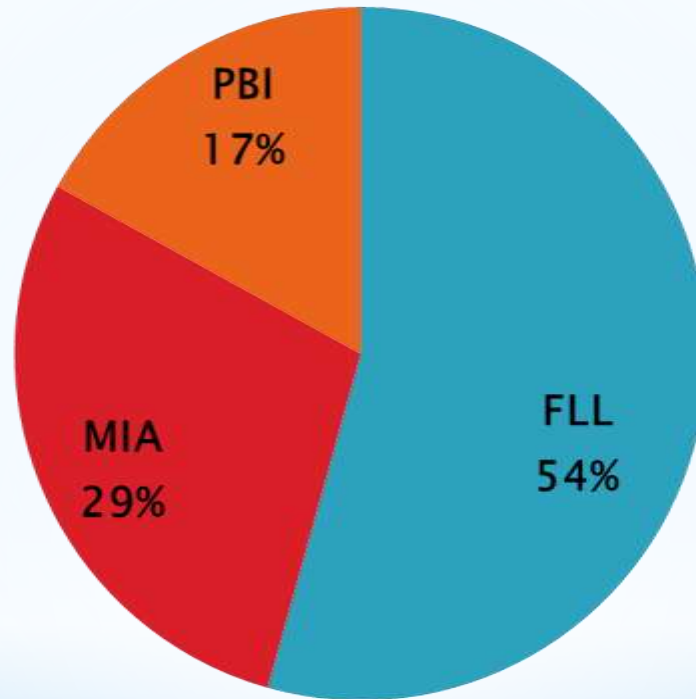
- 2011- FLL ranked as the 21<sup>st</sup> busiest airport in the U.S. with 23,349,835 total passengers and ranked 13<sup>th</sup> in domestic Origin and Destination traffic
- 2012 -January through November total traffic was 21,417,511, up slightly over last year
- FLL's total traffic has increased by 42% in the last 10 years. During that period, international traffic has tripled and it is now 15% of total traffic
- FLL has nonstop service to every major market in the U.S.
- FLL's domestic fares are the lowest among Large Hub airports- 19% less than MIA and 12% less than PBI

# South Florida Market Share

## Domestic Origin and Destination Passengers (US DOT Data)

### FLL VS MIA

- Flights to 16% more US destinations
- 2% more domestic seat capacity
- 20% lower domestic fares



### FLL VS MIA

- Higher domestic load factor
- Non-stop flights to 49 of top 50 domestic markets (need SAN)
- FLL has 7 Low Cost Carriers - MIA has 0

More choices, lower fares, no congestion, easy access

Passengers prefer FLL

*Breeze In - Breeze Out*



**FLL serves more U.S. cities than  
any other airport in South Florida**



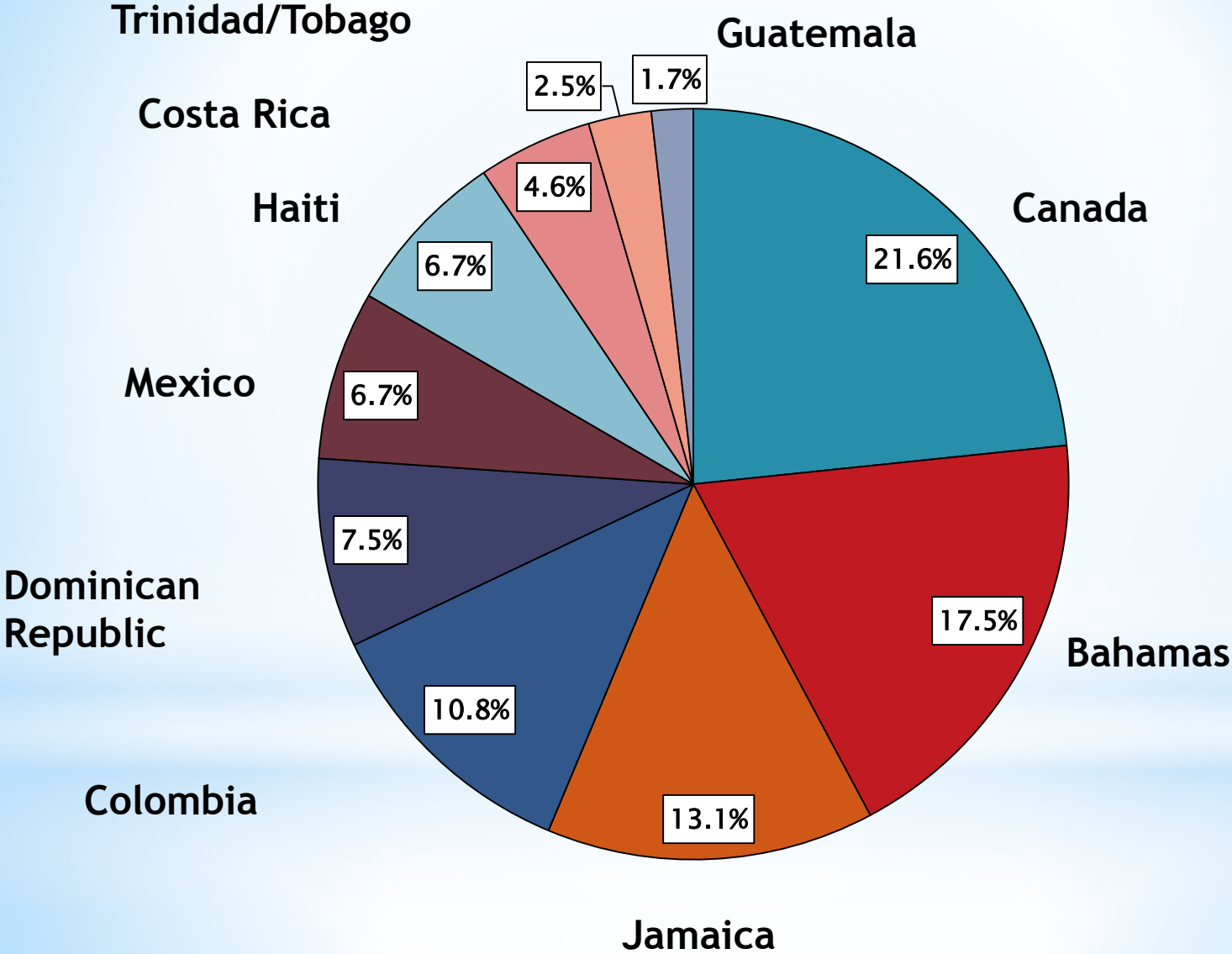
**With the lowest fares on more than 300 daily departures to over 100 destinations  
in the U.S., Latin America, Canada, Europe and the Caribbean**

# FLL's Top 15 Domestic Markets

53% of total O/D passengers

Destination	Daily Round Trip Passengers	% Share
New York-La Guardia	3,844	16.1%
New York-JFK	2,673	11.2%
Atlanta	2,403	10.0%
Newark	2,273	9.5%
Boston	1,897	7.9%
Washington-National	1,511	6.3%
Detroit	1,484	6.2%
Chicago-O'Hare	1,469	6.1%
Los Angeles	1,407	5.9%
Philadelphia	1,382	5.8%
Baltimore	1,288	5.4%
San Juan	1,100	4.6%
Dallas/Fort Worth	962	4.0%
Denver	893	3.7%
Chicago-Midway	869	3.6%

# FLL's Top 10 International Markets



# New Service 2012-2013

## ➤ JetBlue

- Kingston, Jamaica in April
- Bogota, Colombia in May
- New service to Providence in Nov.
- Medellin, Colombia in June (2013)

## ➤ Spirit

- Denver in May, Baltimore in Sept.
- Minneapolis in Nov.

## ➤ AirTran

- San Juan in May

## ➤ Alaska Airlines

- Seattle in July

## ➤ United

- Returns to Washington Dulles in Nov.
- New service to SFO in March 2013

## ➤ Allegiant

- New service to Asheville in Nov.

## ➤ Tiara Air Aruba

- New service to Aruba/Venezuela in Nov.







# *Building for the Future*



**FORT LAUDERDALE-HOLLYWOOD  
INTERNATIONAL AIRPORT**  
BROWARD COUNTY, FLORIDA

*Breeze in. Breeze out.*



# Airport Expansion

## ➤ Terminal Modernizations

- Multiple projects over the next 5 years to upgrade, improve and beautify terminals and concourses
- \$100 Million
- Ongoing thru 2016

## ➤ Terminal 1- Concourse A

- 5 Additional gates
- Presently in the planning stage
- Completion June 2016

## ➤ Terminal 4 - Gate Replacement Project

- Expanded international facilities and gates.
- \$450 Million
- Western portion estimated to be completed early 2015

## ➤ South Runway Expansion Project

- \$791 Million
- Estimated to be completed end of 2014

# Terminal Modernizations

## *Why?*

### ➤ Three primary focus areas

#### ○ Concessions

- ✓ Post Security Facilities - all pre 9-11
- ✓ Insufficient Food & Beverage/News & Gift Options
- ✓ Poor Revenue & Customer Satisfaction

#### ○ Security Checkpoints

- ✓ Terminal 3, Concourse F Complete
- ✓ Concessions Now Post Security
- ✓ Improved Passenger Processing time
- ✓ Significant Growth in Space Requirements

# Terminal Modernizations

## *Why?*

(Continued)

- **Restrooms**

- ✓ **Significant Passenger Growth Beyond Design Capacity**
- ✓ **Product of Project 80's**
- ✓ **1985 - 16,000 Passengers Per Day**
- ✓ **Today - 65,000 Passengers Per Day**



# Terminal Modernizations Concept

Today

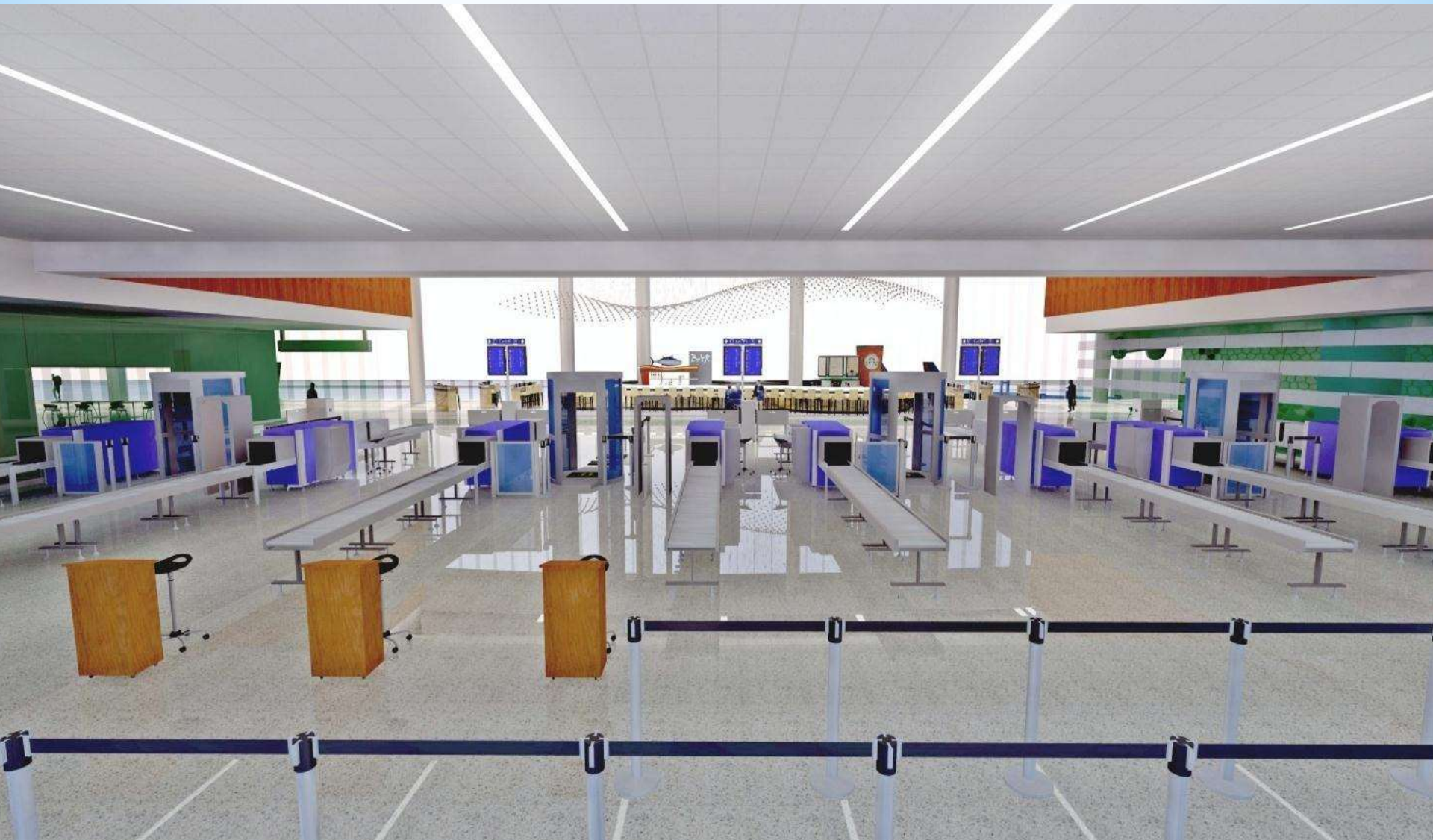


Proposed



# Terminal Modernizations

## Terminal 1 Enhanced Security Checkpoint





# Terminal Modernizations

## Terminal 2 Expanded Concourse







**Blue Bar  
Terminal 3, Concourse F**

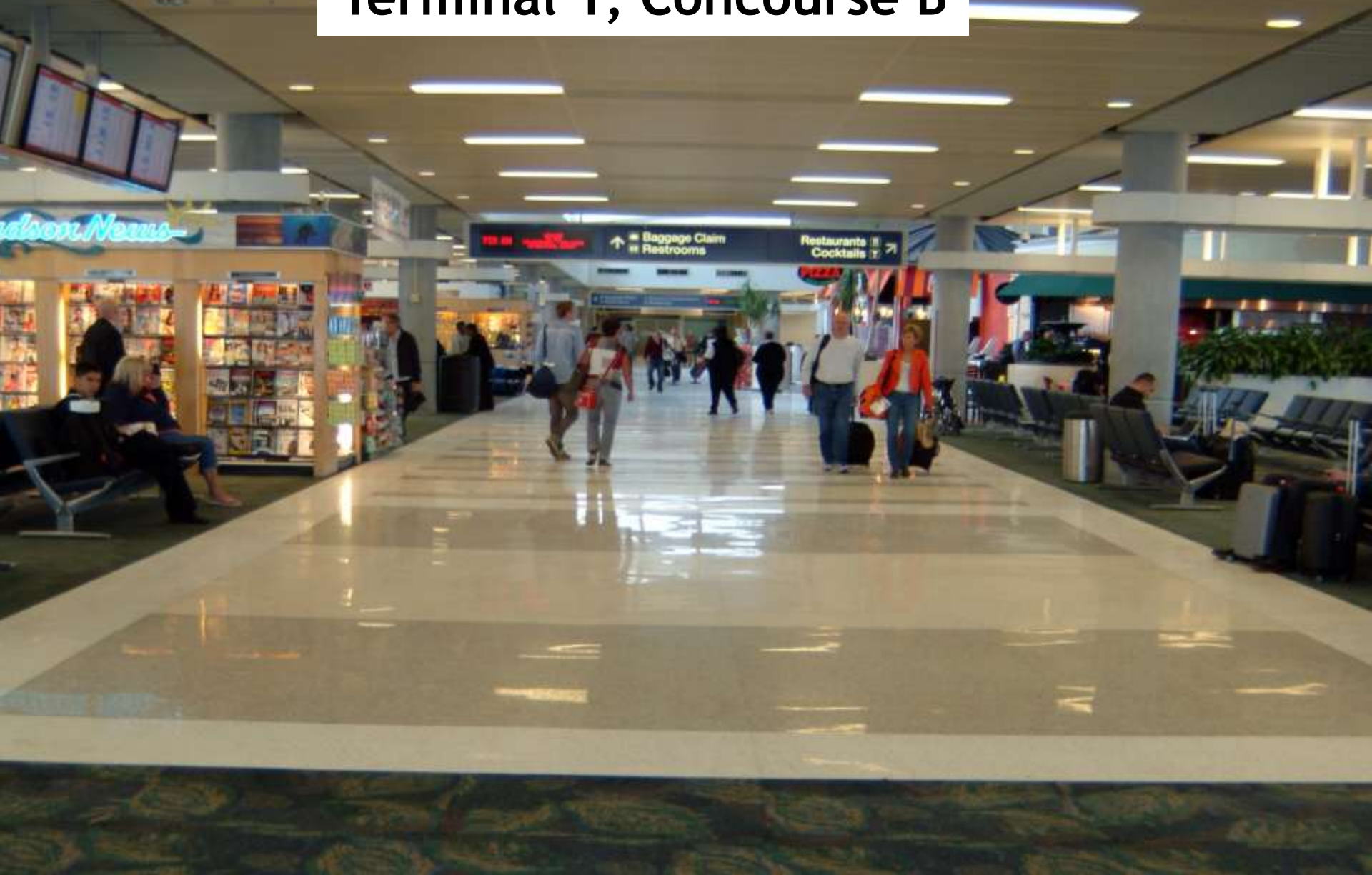
# FOOD NETWORK KITCHEN

Terminal 3, Concourse F





# New Terrazzo Floor Terminal 1, Concourse B



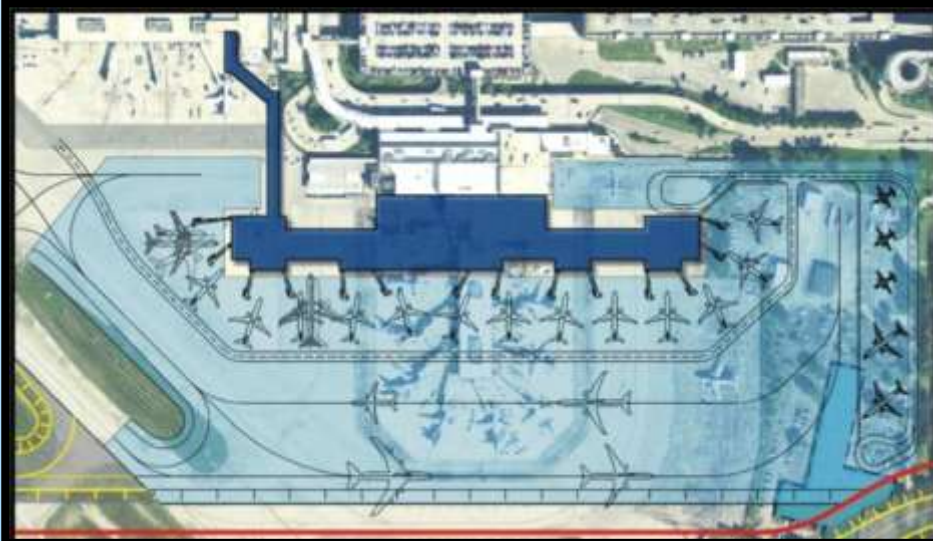


# Terminal 1- Proposed Concourse A - 5 Gates

- Based on Projected Growth and Passenger Demand
- Concourse C - 9 Gates
- Concourse B - 9 Gates



# Terminal 4 Gate Replacement Project





# South Runway Expansion Update



**June**

**July**

**Aug.**

**Sep.**

**Oct.**

**Nov.**

**Dec.**



# South Runway Expansion Update



**December 2012**



# South Runway Expansion Update



Runway Structure Piles, Utilities and Earthwork

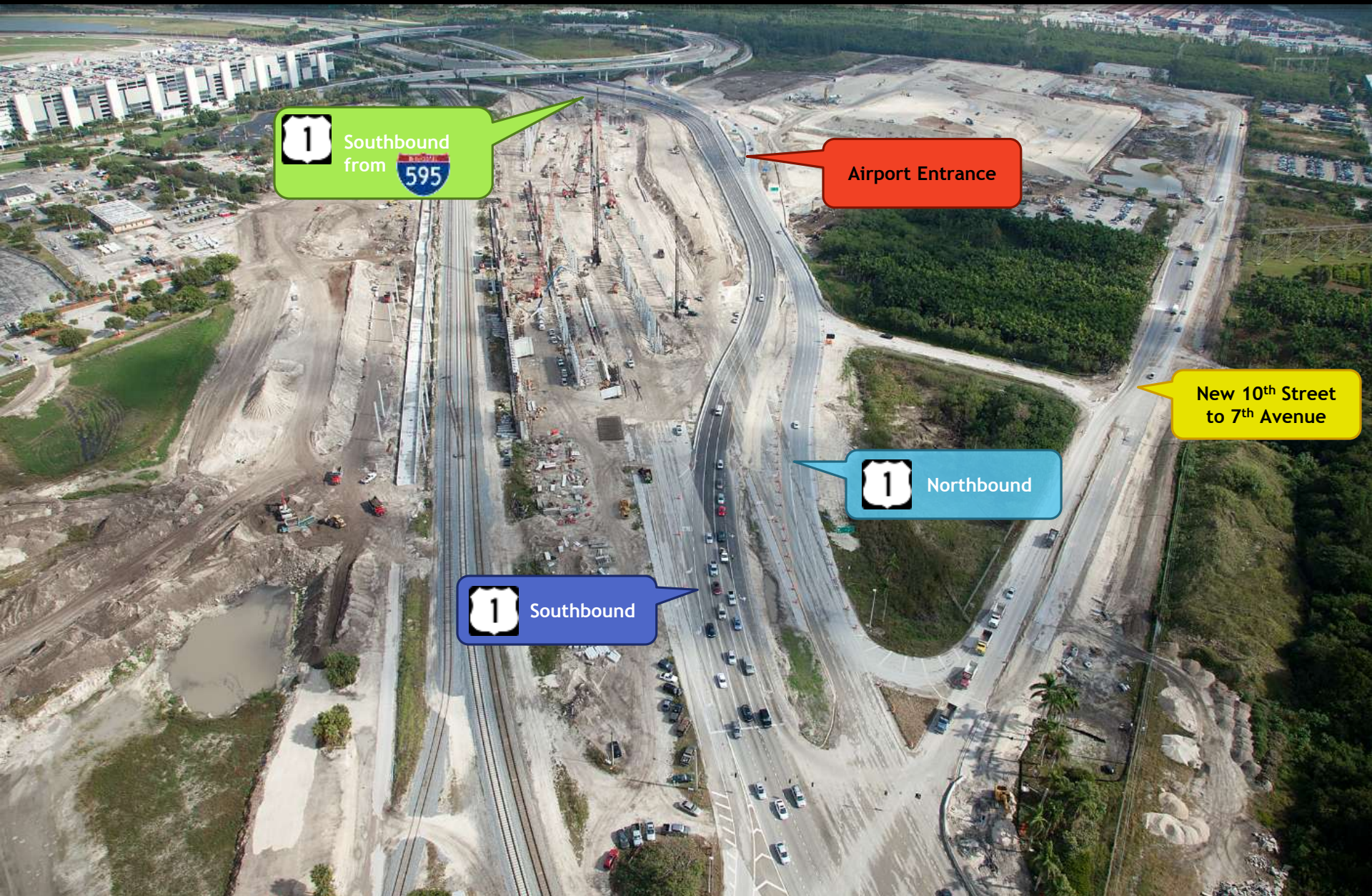
Runway Structures Bents (Walls) and Piles



Runway MSE Wall



# South Runway Expansion Update



**1** Southbound  
from **595**

Airport Entrance

New 10<sup>th</sup> Street  
to 7<sup>th</sup> Avenue

**1** Northbound

**1** Southbound



# Fort Lauderdale-Hollywood International Airport Regional Economic Impact

## ➤ Employment

- 8,900 jobs on-Airport
- 28,100 related off-Airport

## ➤ Annual Economic Impact

- \$358 million in on-Airport wages
- \$2.383 billion in off-Airport wages, indirect, induced impacts (multiplier effect), and other economic impacts

## ➤ Total annual economic impact of \$2.741 Billion

## ➤ South Runway Expansion Project\*

- Estimated 11,000 jobs over the life of the project
- \$1.4 Billion economic impact to regional economy

