

## Fort Lauderdale-Hollywood International Airport June 2011 Traffic Recap

Despite the closure of the main runway for most June, total traffic 1,870,576, up 8.6% over June of last year. International traffic was 273,788, also up 8.6% for the period. June marked the 22<sup>nd</sup> consecutive month of positive growth in total passenger traffic.

### Operations

June commercial operations totaled 18,066, up 2.1% over last June. General Aviation totaled 2,823, down 23.2% over June of last year. Total aircraft movements for the period were 20,889, down 2.3% over last year.

### Carriers

For the legacy carriers, June 2011 saw increases by American up 55.5% and Continental up 16.2%. US Airways and Delta both decreased by 9.9% and 8.8% respectively. For low-cost carriers, Spirit increased by 43.3% (the carrier was on strike last June), JetBlue grew by 8.4%, and Airtran was up 3.3%.

### Schedules

Projected airline schedules indicate that passenger traffic will begin to level off towards the end of the calendar year. The table below depicts percentage increase/decrease in total passenger traffic based on historic load factors.

| Month     | % Change |
|-----------|----------|
| August    | +3.7     |
| September | +1.0     |
| October   | Flat     |
| November  | -3.5     |
| December  | -3.1     |

### Last Quarter Traffic

We anticipate traffic for the last quarter of the calendar year will be down over last year. This is mainly due to Spirit re-allocating capacity to new routes out of Chicago, Las Vegas, and Los Angeles. For October, November, and December, Spirit's capacity at FLL will be down 15.8%. This is an average of approximately 2,500 total seats per day.

Additionally, Spirit's international reductions in service include Cancun, Santo Domingo, and Nassau. JetBlue currently serves these markets and this could be an opportunity for them to increase service.

### Fiscal Year Traffic

Fiscal Year (FY) 2011 should end with approximately 7% increase in total traffic over FY 2010. We project the first quarter of FY12 (Oct/Nov/Dec 2011) to be negative. This trend will continue through the 2<sup>nd</sup> quarter of FY12 (Jan/Feb/Mar 2012).

### **Underserved Markets**

We have identified the top 10 underserved markets at FLL and are working with carriers on either adding service or increasing capacity. In order of magnitude they are:

- Las Vegas
- Columbus
- Pittsburgh
- Indianapolis
- Providence
- Kansas City
- Hartford
- St. Louis
- Buffalo
- Boston

### **New/Increase Service**

On the positive side, American has announced service to Los Angeles in November and additional Chicago and Dallas service in February 2012. Vision will begin service to Freeport in November. Southwest will begin service to Milwaukee and Manchester (MA) in February 2012.

Spirit will receive seven new aircraft in 2012. FLL will see additional capacity when those aircraft arrive (dates to be determined).

Year-to-date passenger share data as follows:

|             |           |       |
|-------------|-----------|-------|
| Spirit      | 2,014,819 | 19.6% |
| Southwest   | 1,858,846 | 15.7% |
| JetBlue     | 1,691,610 | 15.4% |
| Delta       | 1,779,479 | 13.6% |
| Continental | 817,395   | 7.4%  |
| US Airways  | 875,490   | 7.2%  |
| Airtran     | 662,671   | 5.1%  |
| American    | 439,002   | 5.0%  |
| Virgin      | 142,402   | 1.4%  |
| Frontier    | 81,711    | 0.8%  |