



**YLW**

Kelowna International Airport

# Operations Update



**Y L W**

Kelowna International Airport



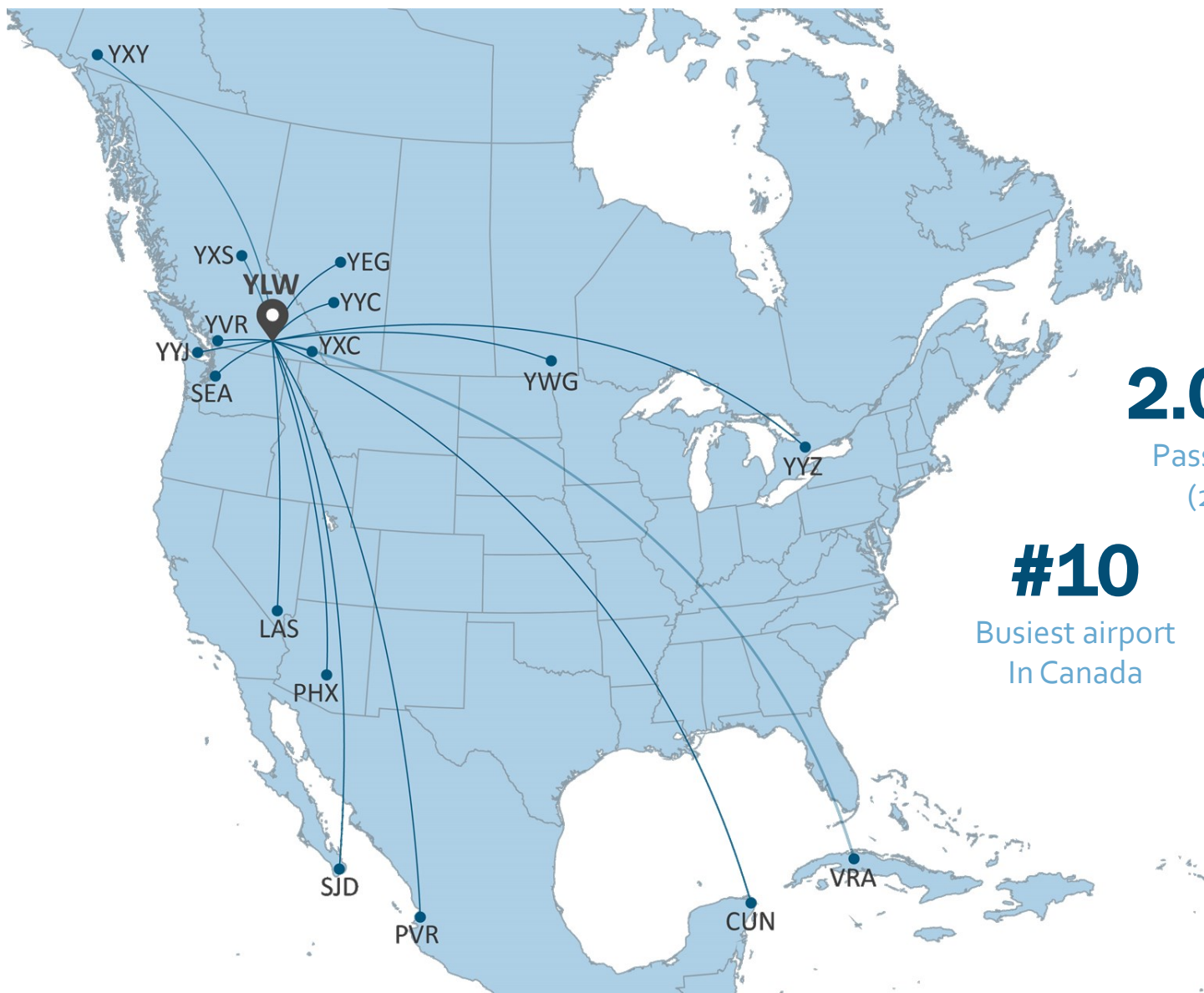
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**2 MILLION PASSENGERS**

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**10<sup>th</sup> busiest airport in Canada**

**Y L W** Kelowna  
International  
Airport



**2.0**  
 Passengers  
 (2018)

**#10**  
 Busiest airport  
 In Canada

Passengers  
 2018 vs 2017

# Passenger traffic slowing in 2019

## Year to Date -1.03%

Date	Monthly	% Monthly	YTD	% YTD
Jan-19	181,729	3.03%	181,729	3.03%
Feb-19	179,039	2.93%	360,768	2.98%
Mar-19	193,715	4.26%	554,483	3.42%
Apr-19	155,532	-0.8%	710,015	2.46%
May-19	155,259	-0.4%	865,274	1.93%
June-19	160,894	-0.7%	1,026,168	1.51%
July-19	179,263	-4.5%	1,198,570	0.57%
Aug-19	183,191	-9.1%	1,388,086	-0.85%
Sept-19	154,396	-2.6%	1,542,482	-1.03%



# Passenger traffic 2003-2019



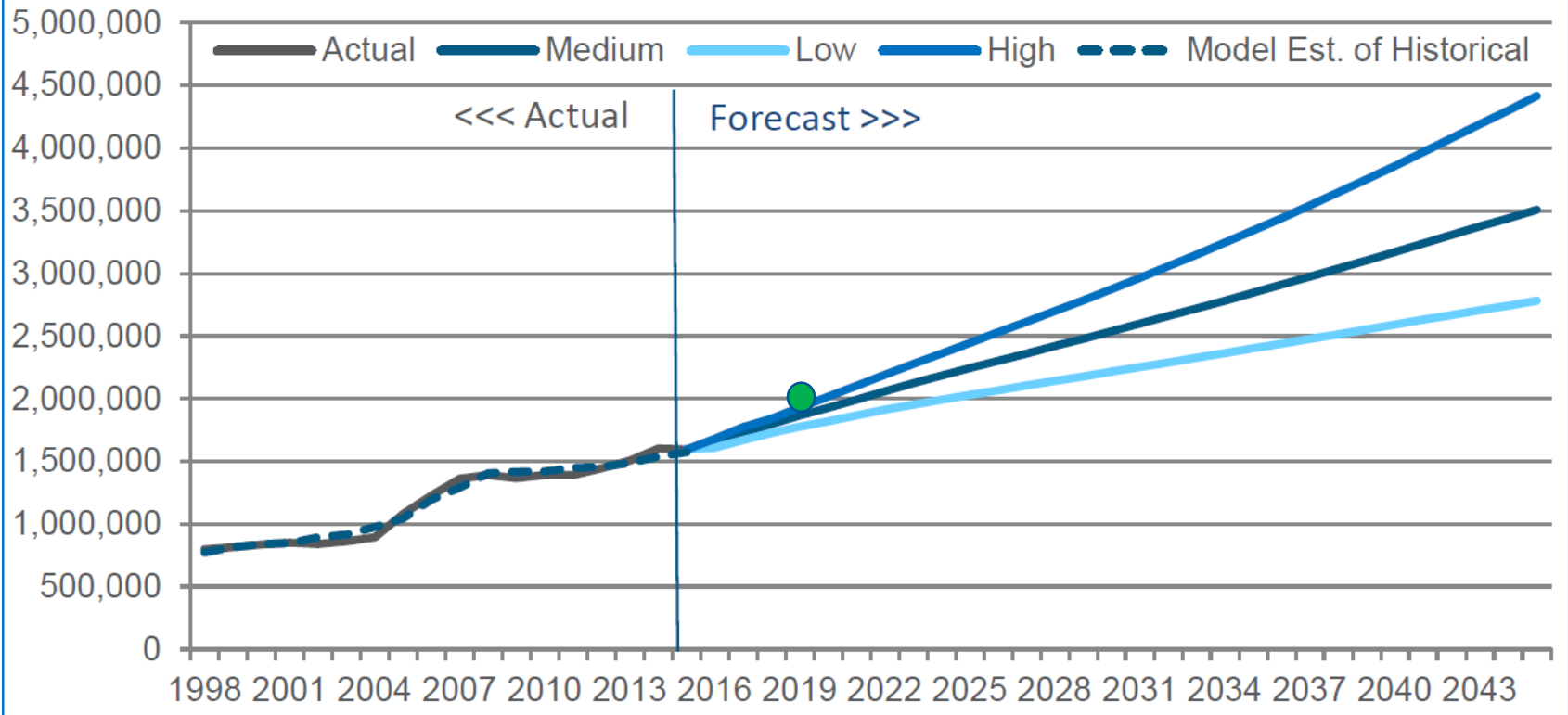
# Domestic and Transborder demand slowing in 2019

Air Service Demand Growth, Year over Year per cent (2017, 2018, YTD 2019)

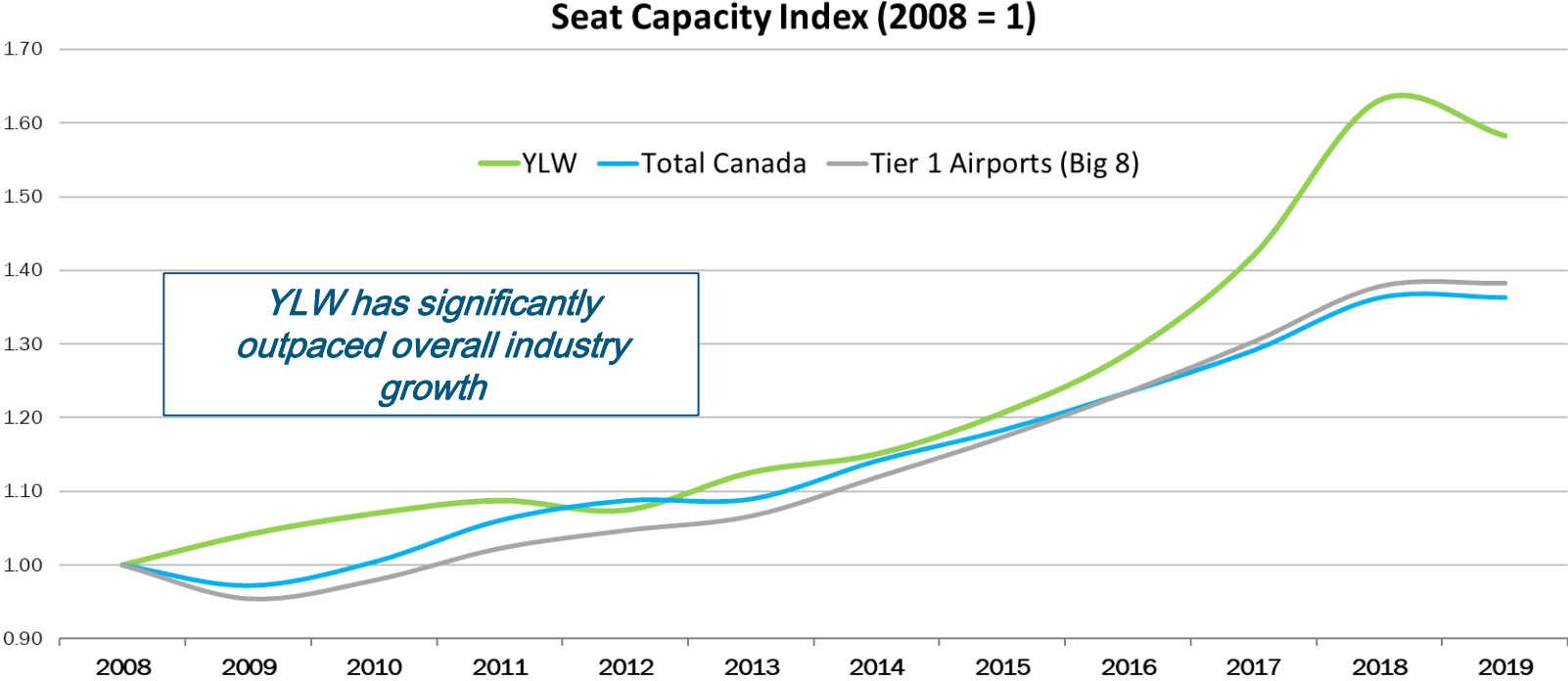


# 2045 Master Plan Forecast

Figure 13: Historical and Forecast E/D Passengers—  
Low, Medium and High Case Scenarios

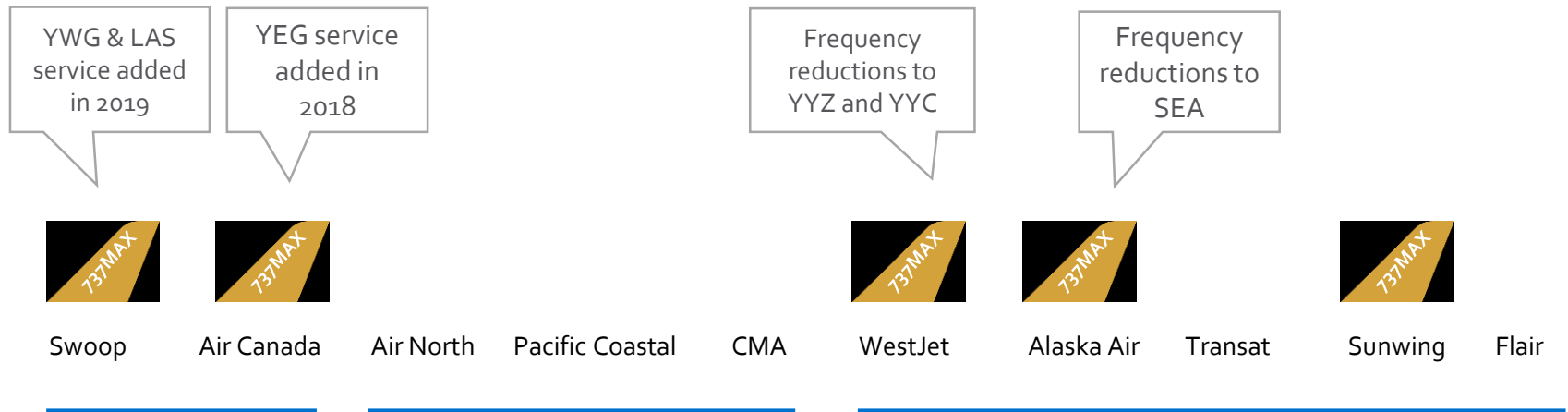


# Seat Capacity - outpacing overall industry





# 2019 seat growth comes from Swoop and Air Canada



# Domestic Market Demand

Rank	City	Province	Market Size - Full Catchment		Airport Share				
			Annual Market Size	Passengers per Day Each Way	YLW	YKA	YVR	YYF	Other
1	Calgary	AB	710,338	973	59%	16%	16%	3%	6%
2	Vancouver	BC	540,932	741	86%	10%	0%	2%	1%
3	Edmonton	AB	386,558	530	81%	8%	7%	0%	4%
4	Toronto	ON	241,545	331	65%	12%	20%	1%	2%
5	Victoria	BC	145,965	200	73%	9%	16%	1%	1%
6	Winnipeg	MB	50,356	69	66%	13%	16%	2%	3%
7	Prince George	BC	44,437	61	36%	7%	57%	0%	0%
8	Cranbrook	BC	35,618	49	29%	3%	68%	0%	0%
9	Whitehorse	YT	31,830	44	40%	8%	51%	0%	1%
10	Fort St John	BC	31,584	43	33%	14%	50%	3%	0%
11	Montreal	QC	29,093	40	69%	10%	18%	3%	1%
12	Terrace	BC	24,977	34	25%	7%	68%	0%	0%
13	Ottawa	ON	24,798	34	57%	15%	25%	1%	2%
14	Saskatoon	SK	19,995	27	71%	12%	13%	1%	3%
15	Regina	SK	16,429	23	60%	26%	9%	2%	2%
16	Nanaimo	BC	15,579	21	61%	12%	24%	2%	1%
17	Fort McMurray	AB	12,080	17	69%	12%	12%	2%	5%
18	Hamilton	ON	10,779	15	65%	13%	19%	1%	2%
19	Quebec	QC	9,961	14	22%	10%	67%	1%	0%
20	Grande Prairie	AB	9,304	13	69%	12%	12%	2%	5%
	Other		81,911	112	61%	17%	19%	2%	1%
	<b>Total</b>		<b>2,474,070</b>	<b>3,389</b>	<b>68%</b>	<b>12%</b>	<b>15%</b>	<b>2%</b>	<b>3%</b>

# Transborder Market Demand

Market Size - Full Catchment					Airport Share				
Rank	City	State	Annual Market Size	Passengers per Day Each Way	YLW	YKA	YVR	YYF	Other
1	Las Vegas	NV	49,502	68	70%	15%	9%	2%	4%
2	Los Angeles	CA	45,261	62	68%	13%	17%	2%	0%
3	Phoenix	AZ	39,750	54	52%	32%	16%	0%	0%
4	Denver	CO	26,782	37	23%	7%	67%	3%	0%
5	Seattle	WA	23,575	32	100%	0%	0%	0%	0%
6	San Francisco	CA	17,960	25	79%	5%	13%	4%	0%
7	New York	NJ	16,342	22	50%	4%	44%	2%	0%
8	San Diego	ON	12,540	17	50%	19%	18%	11%	2%
9	Palm Springs	CA	12,005	16	54%	26%	19%	0%	0%
10	Kahului	HI	9,253	13	52%	5%	43%	0%	0%
11	Honolulu	HI	6,850	9	60%	12%	28%	0%	0%
12	Orlando	FL	6,468	9	63%	20%	13%	0%	4%
13	Boston	MA	6,458	9	55%	6%	37%	2%	0%
14	Salt Lake City	UT	6,273	9	53%	4%	42%	1%	0%
15	Chicago	IL	5,976	8	71%	6%	23%	0%	0%
16	Dallas Fort Worth	TX	5,895	8	54%	20%	24%	1%	0%
17	Portland	OR	5,622	8	79%	4%	13%	3%	0%
18	Houston	TX	4,643	6	54%	20%	24%	1%	0%
19	Fort Lauderdale	FL	4,092	6	64%	10%	25%	0%	1%
20	Washington	DC	3,966	5	55%	6%	37%	2%	0%
	Other		59,300	81	61%	12%	25%	1%	0%
<b>Total</b>			<b>368,513</b>	<b>505</b>	<b>61%</b>	<b>13%</b>	<b>23%</b>	<b>2%</b>	<b>1%</b>



115-140 seats, dual class configuration  
Flying range up to 6,275km,  
up to ~7.5 hours flying time



~200 seats, dual class configuration  
Flying range up to 8,750km,  
up to ~9-10 hours flying time



January 2020 entry  
Orders: 45 A220-  
300s



Now Flying: 20  
Orders: 95 A220-  
100/300s



Now Flying: 2 A321neos/LR  
Orders: 15 A321LRs



# A220/A321XLR: Narrowbody Aircraft Enabling Connectivity



# Ultra-low cost carriers



# US carriers

*Alaska*

