20/23

YEAR IN REVIEW

TampaAirport.com

Tampa International Airport

Tampa International Airport

THIS TEAM STAYED FOCUSED, AND WITH FOCUS CAME GREAT PROGRESS.

// 2023 YEAR IN REVIEW

A MESSAGE FROM OUR CEO

If I could sum up the Hillsborough County Aviation Authority's past year in one word, it would be: Focused.

We went into 2023 having laid the groundwork for incredible things to come, and this was a year to refine, enhance and concentrate on what we do best. We navigated both incredible wins and tough challenges by sticking to our values of Excellence, Teamwork, Community, Hospitality and Vision. Together, we charged full speed ahead, ensuring Tampa International Airport and our three general aviation airports are positioned for the best possible future for our employees, our travelers and our community.

We brought clarity to our future Airside D terminal by selecting a design-build partner and assembling a special committee of department leaders to guide the development process. We gave our community a glimpse of aviation's future by bringing Florida's first urban air mobility test flight to TPA. We made fiscally smart decisions that continue to strengthen our bottom line. And we maintained our ranking as

America's Favorite Airport by providing a stellar and measurable customer experience.
This team stayed focused, and with focus came great progress.

I proudly present to you this 2023 Year In Review, which includes our financial and market overviews and some highlights that showcase our values in action.

As always, I'm thankful to be a part of a team that never wavers from our mission. Our accomplishments over the past year continue to ensure the Authority, our airports and our region sustain a bright and prosperous future.

Sincerely,

Joe Lopano

// **TEAMWORK**

The Hillsborough County Aviation Authority thrives best when several teams work together, whether it's tackling a problem or planning for the future. In 2023, the organization formed the Airside D Steering Committee, pulling together leaders from Operations, IT, Real Estate, Concessions, Audit, Legal, Finance, Planning & Development, Maintenance and the Office of Innovation. Those leaders committed much of the year, as well as the next several months, to shaping various aspects of TPA's first new terminal in nearly 20 years and ensuring it meets the Authority's ambitious goals and standards.

Challenges also seem to bring out the best work across all departments. The year brought two very disruptive storms – Hurricane Idalia and Hurricane/Tropical Storm Nicole – which required all teams and tenant partners to make critical operational and safety decisions. For Idalia, TPA closed for more than 24 hours, with several hours of preparation, which included strapping down nearly 60 boarding bridges, relocating planes, deploying an estimated 600 sandbags across Airport facilities, and securing more than a dozen active construction sites.

In October, TPA employees also sprung into action to accommodate three days of incoming charter flights carrying passengers rescued from the Gaza-Israel war zone. On short notice, the Authority worked with state partners and U.S. Customs and Border Protection to set up a makeshift, temporary airfield processing area and family resource center, a historical first for TPA.

Treating guests to comfort, convenience and exceptional service is a way of life at TPA, and 2023 ushered in a number of upgrades and enhancements. Early in the year, TPA became the first airport in the U.S. to partner with Uber Eats to power its mobile-ordering program, TPA to Go, a welcome time-saving option for travelers.

The Airport also refurbished hundreds of comfy seating units throughout its facilities, adding much-needed cupholders to cut down on spills, and installed moving walkways on Level 4 of the Long Term Parking Garage to help speed guests along their journeys.

Tours continue to be a favorite among community guests at TPA. During Black History Month, the Business Diversity team hosted several local high school students to teach them about African American aviators and careers in aviation, as well as touring the airfield, the United Airlines hangar and the Airport fire station. The Guest Experience team also conducted hundreds of tours for various groups and guests throughout the year, and the Communications team hosted its popular Plane Spotters Tour for local amateur aviation photographers.

TREATING GUESTS TO COMFORT, CONVENIENCE AND EXCEPTIONAL SERVICE IS A WAY OF LIFE AT TPA.

// **EXCELLENCE**

Tampa International Airport has a longstanding reputation for being spectacularly clean, customer-focused and an all-around pleasant place to be. By continuing to set a high bar, the Airport was recognized – again – by J.D. Power as the #1 Large Airport in its North America Airport Satisfaction Study, one of the most prestigious analytics reports in the industry.

The award belongs to all Airport employees, tenants and partners, many of whom received their own industry recognition for their standards of excellence. From concessions employees getting recognition at the I Am TPA awards to the creator of the Main Terminal flamingo sculpture winning the prestigious

CODAWorx Award, many played a role in delivering an outstanding customer experience that made a difference in 2023.

The Authority was also named among the Tampa Bay Times' Top 100 Workplaces in the Tampa Bay area for the sixth year in a row, based on its employee experience survey results. It placed #21 in the large company category and was the only government agency in that category to make the list.

MANY PLAYED A ROLE IN DELIVERING AN OUTSTANDING CUSTOMER EXPERIENCE THAT MADE A DIFFERENCE.

CONGRATS, PHOEBE
Winner of CODAworx's
People's Choice Award
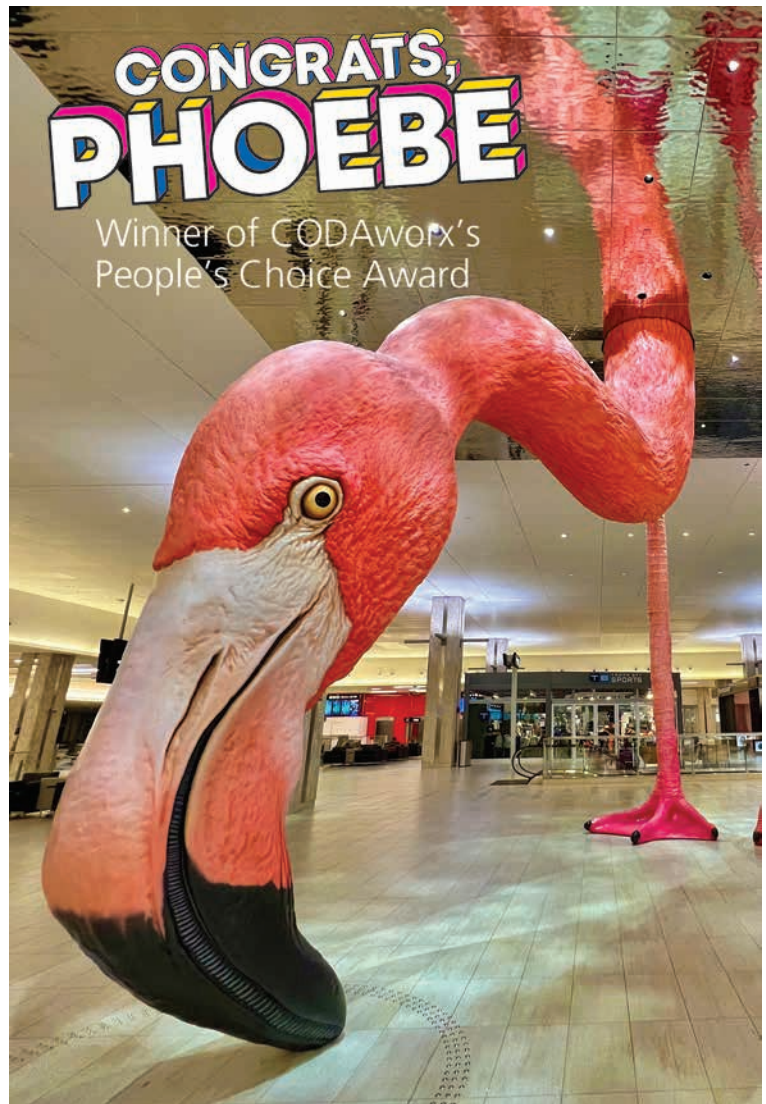
2023 WAS A SIGNIFICANT YEAR IN BRINGING THE FUTURE INTO FOCUS.

// **VISION**

While the Authority is always engaged in long-term planning, 2023 was a significant year in bringing the future into focus. In July, the Authority held the last of three public outreach meetings to showcase the latest findings and most updated outlook in the Master Plan Update, which will inform TPA's growth and development over the next 20 years.

One component of that outlook was incorporating the future of Advanced Air Mobility, or "air taxis," into TPA's Master Plan infrastructure. While the technology is still new and in its early demonstration phases, the Authority designated General Aviation and Government Affairs leaders to study its uses, feasibility and safety regulations. In November, TPA invited Volocopter to launch Florida's first electric vertical take-off and landing (eVTOL) test flight, and also the first at a U.S. commercial airport. Mayors from Tampa and St. Petersburg, FDOT and legislative representatives, news crews and more than a hundred others in the crowd watched in awe as the eVTOL aircraft hovered in the sunny skies.

The Authority also took a big step toward securing its financial future in March by purchasing the SkyCenter One building, where the Authority's headquarters reside as well as several other office tenants. Owning the building – Tampa's first LEED Platinum-certified construction project – brings significant monthly cash flow to the Authority, further diversifying its portfolio.
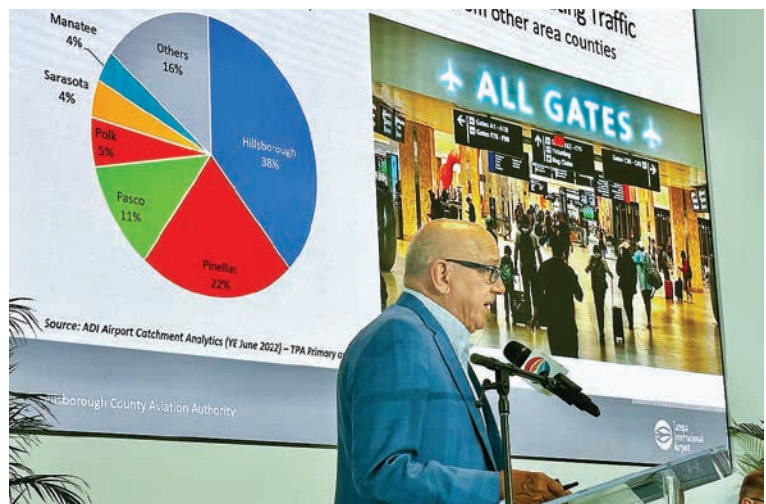
// **COMMUNITY**

In addition to team members volunteering dozens of hours of their own time representing TPA at community parades in celebration of MLK Day, Gasparilla and Pride, the Authority presented a check for more than $170,000 to the United Way Suncoast in June. It was a record amount of giving, thanks to money raised through the TPA 5K on the Runway, the Voice of TPA contest and record-high participation in the annual Employee Giving Campaign.

Team members also shared TPA's story and demonstrated thought leadership through more than 100 speaking engagements at industry conferences, community organization meetings, universities, local K-12 schools and other gatherings in 2023. Human Resources, Marketing, Maintenance, Concessions, Operations and other departments helped thousands of job seekers learn more about available positions at TPA through two successful Hiring Days, one of which drew 1,500 attendees.

Aviation Authority leaders continued to play a role in shaping transportation and economic growth for the Tampa Bay region. In October, CEO Joe Lopano was named the 2024 Chair of the Tampa Bay Economic Development Council, lending his voice and expertise to help drive and recruit new domestic and international businesses to the area.
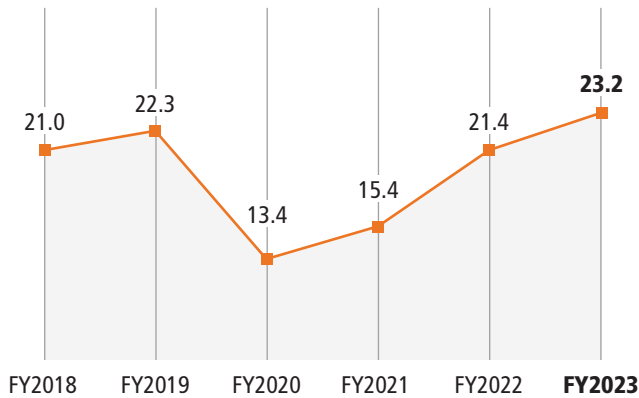
AVIATION AUTHORITY LEADERS CONTINUED TO PLAY A ROLE IN SHAPING TRANSPORTATION AND ECONOMIC GROWTH FOR THE TAMPA BAY REGION.

// FINANCIAL OVERVIEW
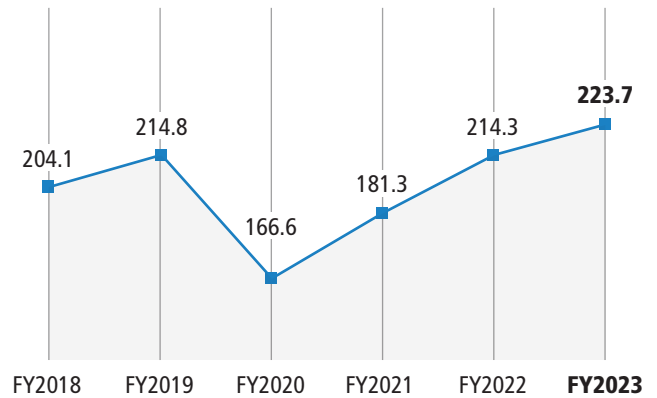
The HCAA fiscal year is October 1 through September 30

Total Passengers and Operations
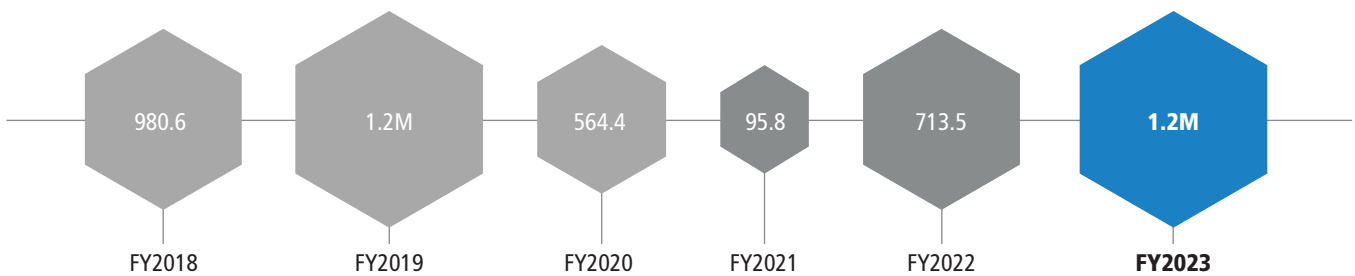
🟧 *Passengers - Millions Enplaned and Deplaned*

🟦 *Operations - Thousands of Landings and Takeoffs*

	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023
Passengers	21.0	22.3	13.4	15.4	21.4	**23.2**
Operations	204.1	214.8	166.6	181.3	214.3	**223.7**

+8.33% increase in total passengers vs. FY22

+4.38% increase in operations vs. FY22

International Passengers

FY2018	FY2019	FY2020	FY2021	FY2022	FY2023
980.6	1.2M	564.4	95.8	713.5	**1.2M**

Air Cargo and Mail

🟧 *Air Cargo - Millions of Pounds*   🟦 *Mail - Millions of Pounds*

	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023
Air Cargo	398.7	437.6	492.2	426.8	467.8	**374.5**
Mail	29.2	26.4	23.8	29.4	28.1	**15.7**
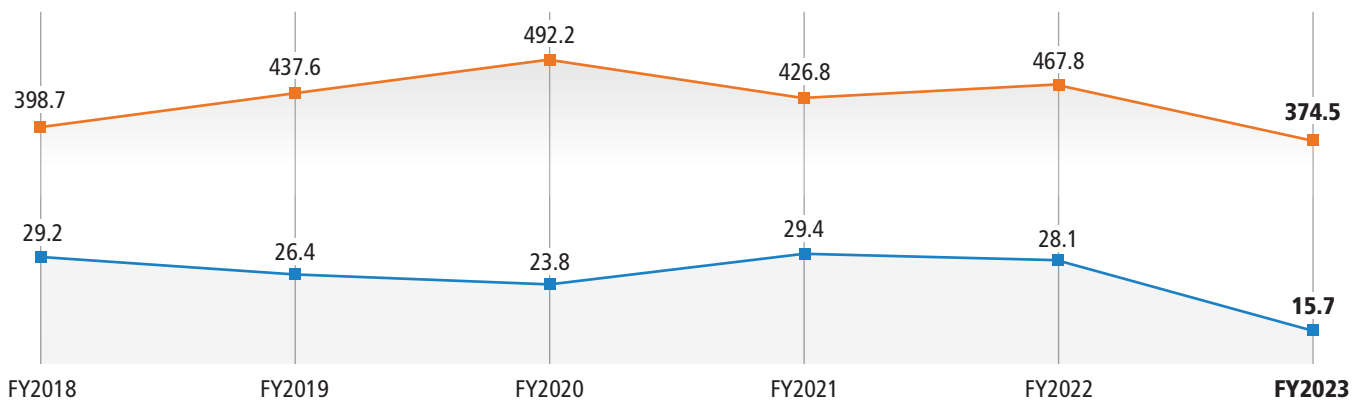
Revenue Performance

Gross Revenue ($ Millions)

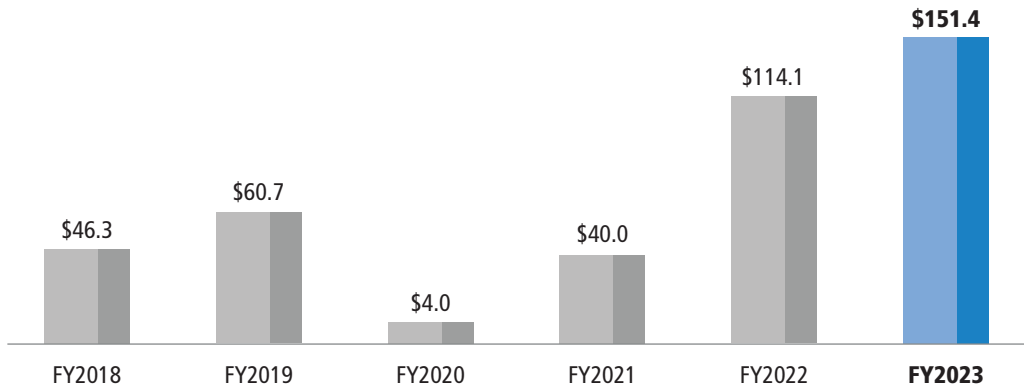| FY2018	FY2019	FY2020	FY2021	FY2022	FY2023
$240.6	$271.7	$196.1	$234.2	$326.2	**$381.4**
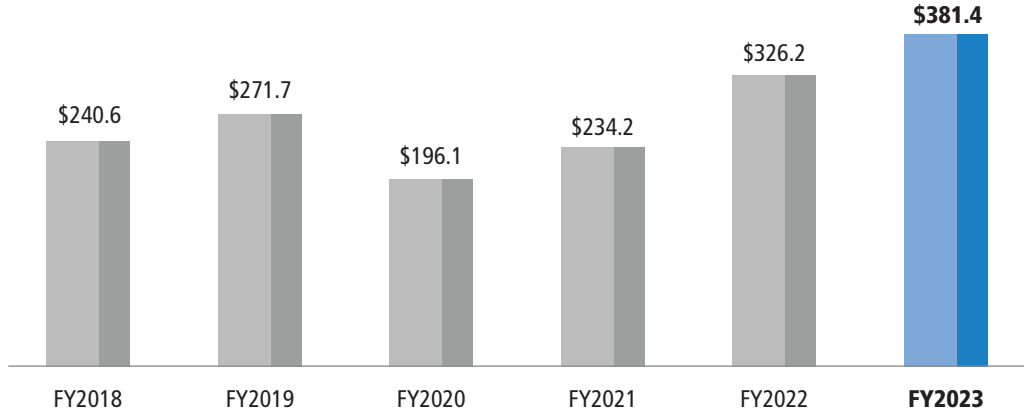
HCAA ended the 2023 fiscal year on September 30 with revenues totaling $381.4 million, a
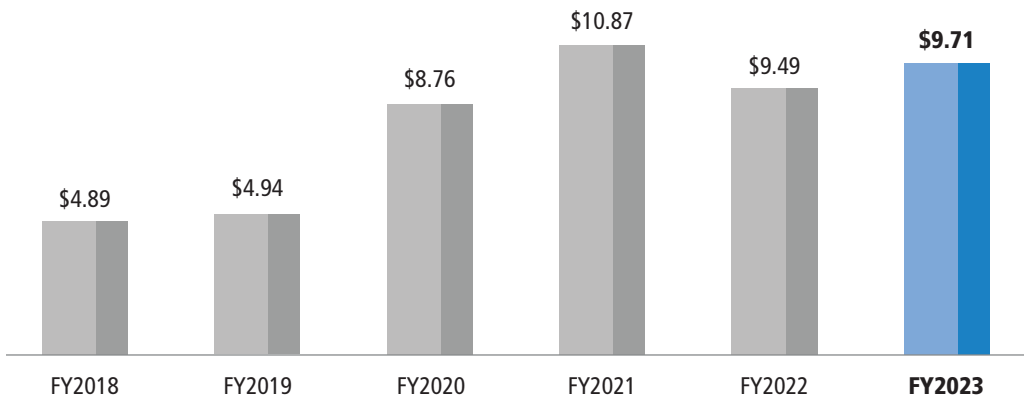
$55M

increase compared to the previous year.

Bottom-Line Financial Results

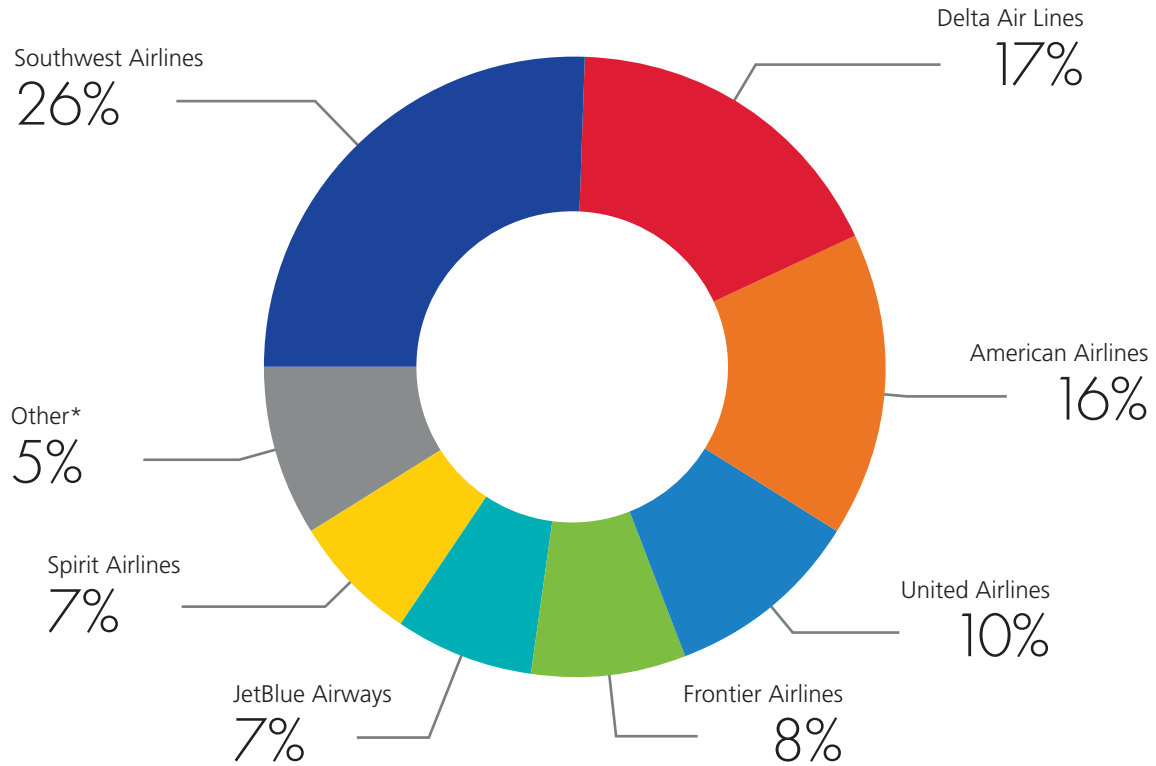*Funds Available for Air Service Incentive Program, Capital and Reserves ($ Millions)*

FY2018	FY2019	FY2020	FY2021	FY2022	FY2023
$46.3	$60.7	$4.0	$40.0	$114.1	**$151.4**

Cost Per Enplaned Passenger

FY2018	FY2019	FY2020	FY2021	FY2022	FY2023
$4.89	$4.94	$8.76	$10.87	$9.49	**$9.71**

CPE increased by

$0.22

per passenger for FY2023.

Market Share FY23

Delta Air Lines
17%

Southwest Airlines
26%

American Airlines
16%

United Airlines
10%

Other*
5%

Spirit Airlines
7%

Frontier Airlines
8%

JetBlue Airways
7%

* Breeze Airways	1.4%	Avelo Airlines	0.7%	Virgin Atlantic Airways	0.5%	Edelweiss Air	0.1%
Air Canada	1.3%	British Airways	0.7%	Copa Airlines	0.3%	Global X	0.1%
Alaska Airlines	1.1%	Sun Country Airlines	0.6%	WestJet	0.3%	Swift Air	0.06%
Silver Airways	0.8%	Discover Airlines	0.5%	Cayman Airways	0.2%	World Atlantic Airlines	0.02%
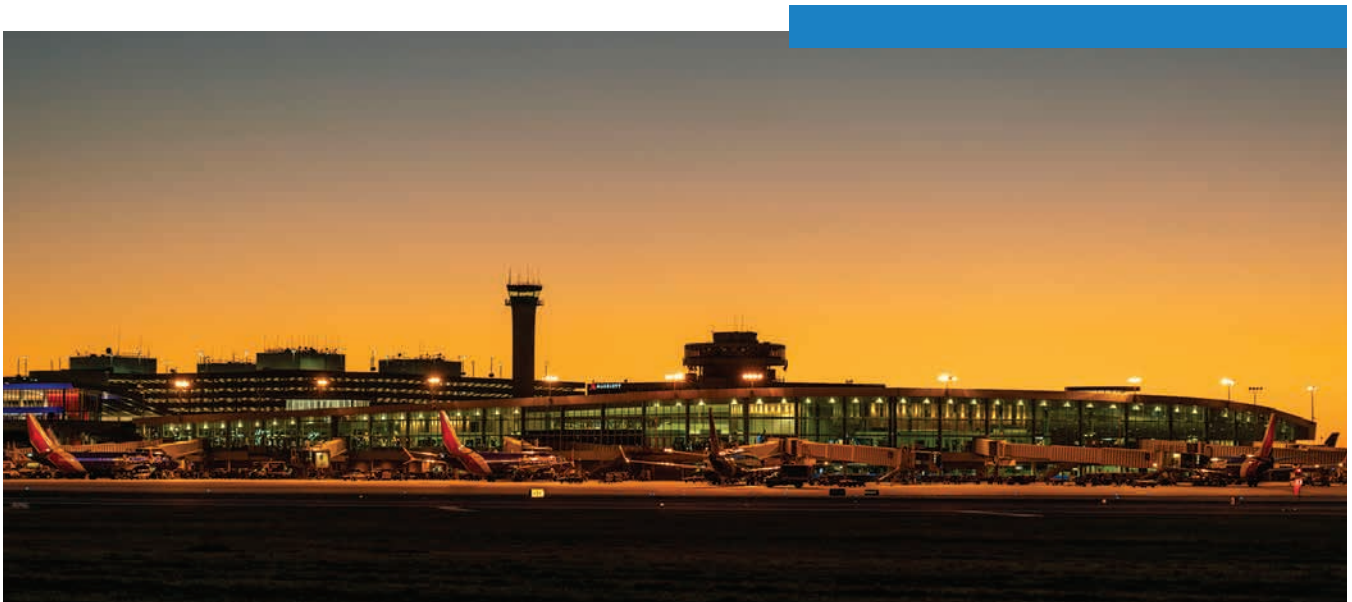
Top 25 Nonstop Markets

Rank	Destination	FY23 Passengers
1	**New York, NY**	**1,960,584**
2	**Chicago, IL**	**1,191,938**
3	**Boston, MA**	**791,262**
4	**Atlanta, GA**	**787,651**
5	**Dallas/Ft. Worth, TX**	**663,672**
6	Detroit, MI	653,673
7	Denver, CO	634,660
8	Philadelphia, PA	624,290
9	Baltimore, MD	490,071
10	Minneapolis, MN	450,138
11	San Juan, PR	409,749
12	Las Vegas, NV	407,545
13	Washington, DC	401,123
14	Nashville, TN	387,782
15	Houston, TX	364,922
16	Los Angeles, CA	362,081
17	Cleveland, OH	354,965
18	Raleigh/Durham, NC	318,645
19	Hartford, CT	295,330
20	Indianapolis, IN	295,058
21	Phoenix, AZ	287,668
22	Pittsburgh, PA	281,188
23	Seattle, WA	274,050
24	Cincinnati, OH	264,648
25	New Orleans, LA	247,070

Source: Diio Mi

2023 Passenger Airlines

Signatory

Air Canada	JetBlue Airways
Alaska Airlines	Porter Airlines
American Airlines	Southwest Airlines
Breeze Airways	Silver Airways
British Airways	Spirit Airlines
Copa Airlines	United Airlines
Delta Air Lines	WestJet
Discover Airlines	Virgin Atlantic Airways
Frontier Airlines	

Non-Signatory

Avelo Airlines	Global Crossing Airlines
Caribbean Sun Airlines	Lynx Air
Cayman Airways	Mesa Airlines [t]
Edelweiss Air	Republic Airways [tx]
Endeavor Air (wholly-owned subsidiary of Delta)	SkyWest Airlines [s]
	Sun Country Airlines
Envoy Air (wholly-owned subsidiary of American)	

Cargo

ABX Air	FedEx
Air Transport International, Inc.	Southern Air, Inc. [y]
	Sun Country Airlines
Atlas Air	UPS

HCAA Airports

Tampa International Airport (TPA)
Peter O. Knight Airport (TPF)
Plant City Airport (PCM)
Tampa Executive Airport (VDF)

Special thanks to our community partners

Visit Tampa Bay
Visit St. Pete/Clearwater
Tampa Bay Economic Development Council
Tampa Bay Chamber of Commerce
St. Petersburg Area Chamber of Commerce

Acknowledgments

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To view the Airport's FY2023 financials,
please scan this code or visit
www.TampaAirport.com/facts-statistics-financials

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