



Preliminary Forecasts San Diego County Airports

San Diego County Regional Aviation Strategic Plan Aviation Demand Forecasts

November 2008



San Diego County RASP Forecasts of Aviation Demand

■ Task objective:

- To forecast aviation demand at 16 public-use and military airports in San Diego County through 2030

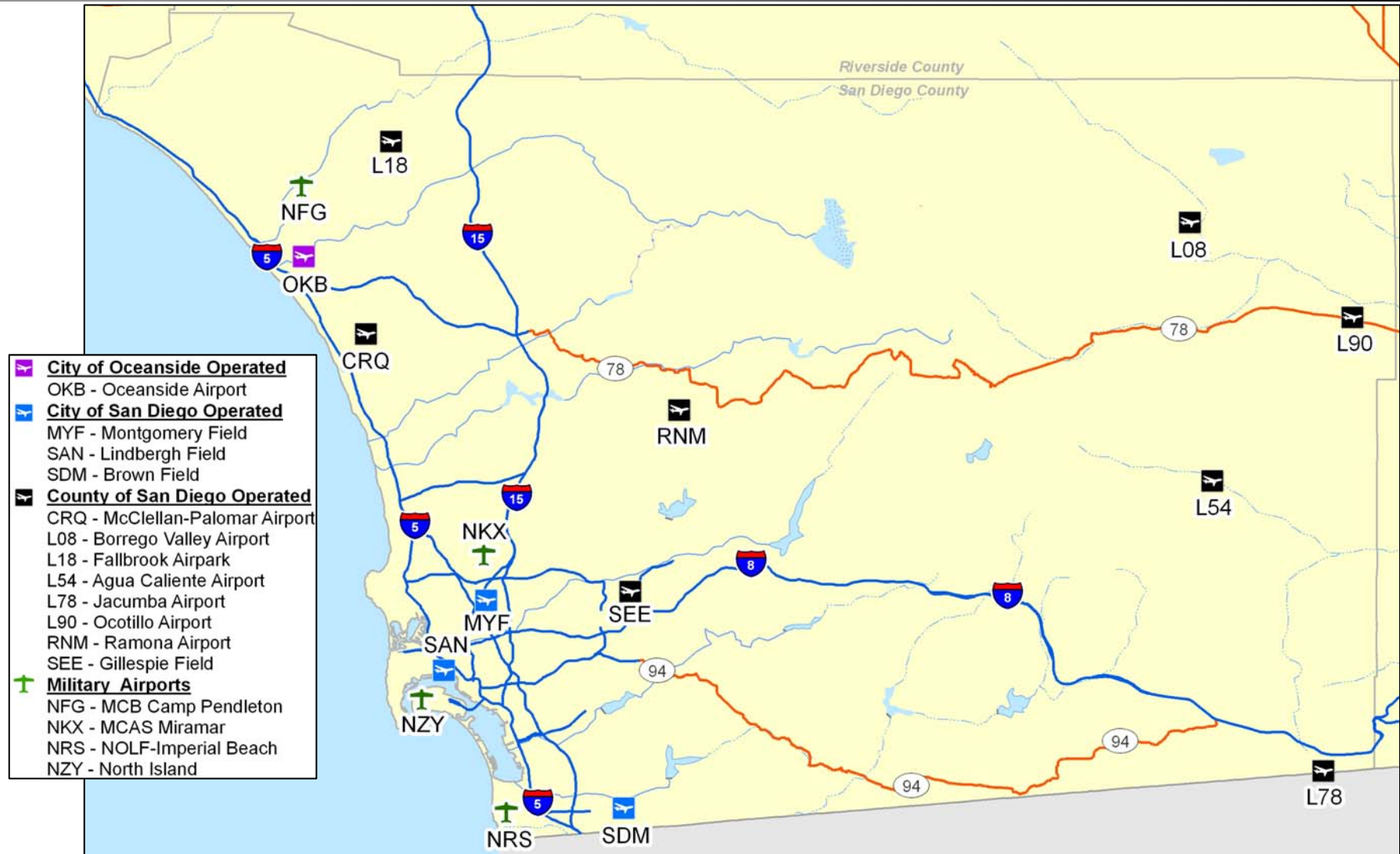
■ Aviation demand forecast elements include:

- Commercial Passengers & Air Cargo
- Air Taxi & General Aviation
- Military

■ Status:

- Preliminary forecast for public-use airports is complete
- Forecasts require review and comment

16 Airports in San Diego County



Current Airport Role

Airport	Airport Code	Classification	Current Operations (2007)
San Diego International Airport	SAN	Large Hub Primary Commercial Service	229,486
McClellan-Palomar Airport	CRO	Non-hub Primary Commercial Service	212,023
Montgomery Field Airport	MYF	Reliever	222,492
Gillespie Field Airport	SEE	Reliever	295,652
Brown Field Municipal Airport	SDM	Reliever	145,661
Ramona Airport	RNM	Reliever	164,699
Oceanside Municipal Airport	OKB	General Aviation	14,128
Fallbrook Community Airpark	L18	General Aviation	33,286
Borrego Valley Airport	L08	General Aviation	26,251
Agua Caliente Airport	L54	Limited Use GA	4,400
Ocotillo Airport	L90	Limited Use GA	800
Jacumba Airport	L78	Limited Use GA	325
MCAS Miramar	NKX	Military Airport	n.a.
MCAS Camp Pendleton	NFG	Military Airport	n.a.
Imperial Beach Naval Outlying Field	NRS	Military Airport	n.a.
North Island Naval Air Station	NZY	Military Airport	n.a.

Notes: Classifications based on FAA National Plan of Integrated Airport Systems (NPIAS), 2009-2013.

Large Hub Primary Commercial Service - Airports that enplane at least 1% of total U.S. passengers

Non-hub Primary Commercial Service - Airports that enplane less than 0.05% of total U.S. passengers but more than 10,000 enplanements annually

Reliever - General aviation airports with 100 or more based aircraft or 25,000 annual itinerant operations

General Aviation - Airports with less than 2,500 annual enplanements

Limited Use GA - Airports not included in NPIAS

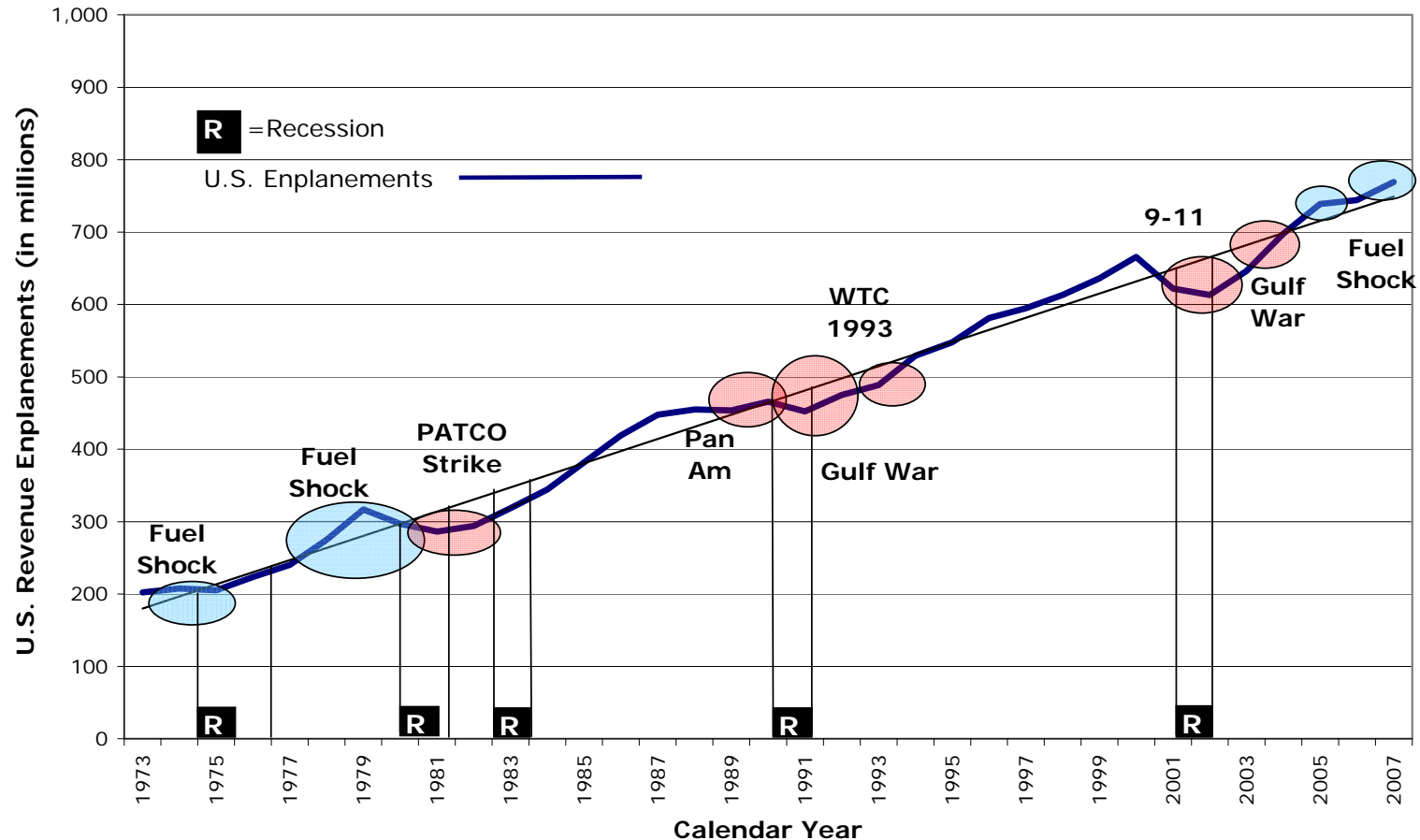
Forecast Assumptions

- **Role of each airport remains unchanged**
- **Adopted Master Plan Forecasts for SDIA and Gillespie Field**
- **Forecasts take into consideration historical trends at each county airport and national industry trends**
- **Forecasts are based on:**
 - **Information from County, City, Airport staff, and FAA**
 - **Understanding of future airport plans and previous related studies**
 - **Understanding of foreseeable changes**
 - Increasing Congestion at SDIA
 - Potential runway extension at McClellan-Palomar
 - Loss of a flight school at Gillespie
 - New high-end FBO at Brown Field
 - Ramona Air Center
 - Airport leased to a private company at Oceanside

Commercial Airline Industry Trends

Historical Trends

- Demand for air travel in the U.S. correlates strongly with fluctuations in the economy.



Sources: Air Transport Association of America; Landrum & Brown analysis

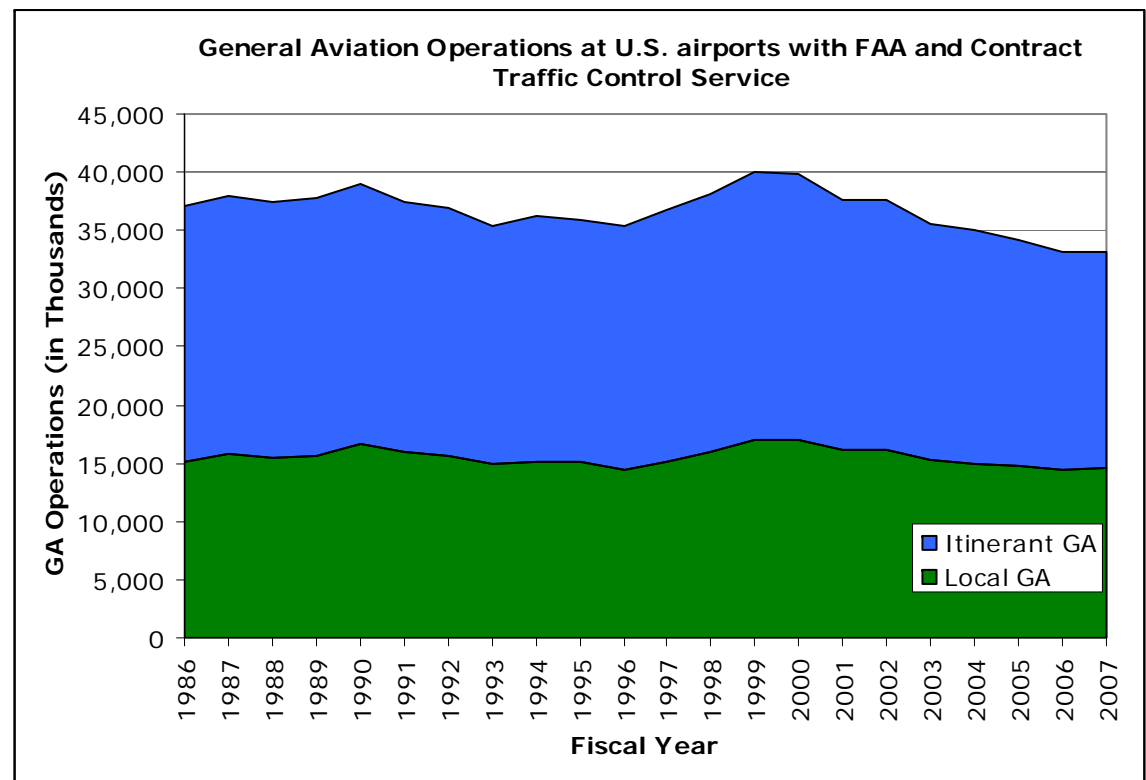
Commercial Airline Industry Trends

- Downturn in traffic after 9/11 terrorist attacks and recession
- Airline bankruptcies, labor restructuring and cost cutting led to profitability in 2006
- Oil prices surged to record levels in 2006-2008
- Airlines increased fares and cut amenities to offset increases in fuel costs
- Airlines also restructuring routes and cutting capacity – 10-15% capacity reduction scheduled for 2008 Q4 & 2009 Q1
- Focus on profitable international routes
- Possibility that fewer people will fly as fares increase and there are fewer flight choices

General Aviation Industry Trends

Historical Trends

- 1994 General Aviation Revitalization Act (GARA) led to growth in GA industry in late 1990s
- Rebound subsided by 2000
- GA traffic slowed in 2001 due to 9/11 and recession
- All indicators (aircraft shipments, active aircraft, hours flown) show decline in piston aircraft and increase in jets & helicopters since 2000



Source: FAA Aerospace Forecasts for various years

General Aviation Industry Trends

Future Trends

- **Future trends through 2025 according to the FAA *Aerospace Forecasts, Fiscal Years 2008-2025*:**
 - **Number of active General Aviation aircraft will increase by 1.4% annually**
 - **Growth of 3% annually in the number of General Aviation hours flown**
 - **Number of student pilots is expected to increase at a rate of 1% annually**
 - **GA operations at airports with an ATCT will increase by 1.3% annually**
 - **Business use will continue to grow faster than recreational use**



Commercial Activity Forecast

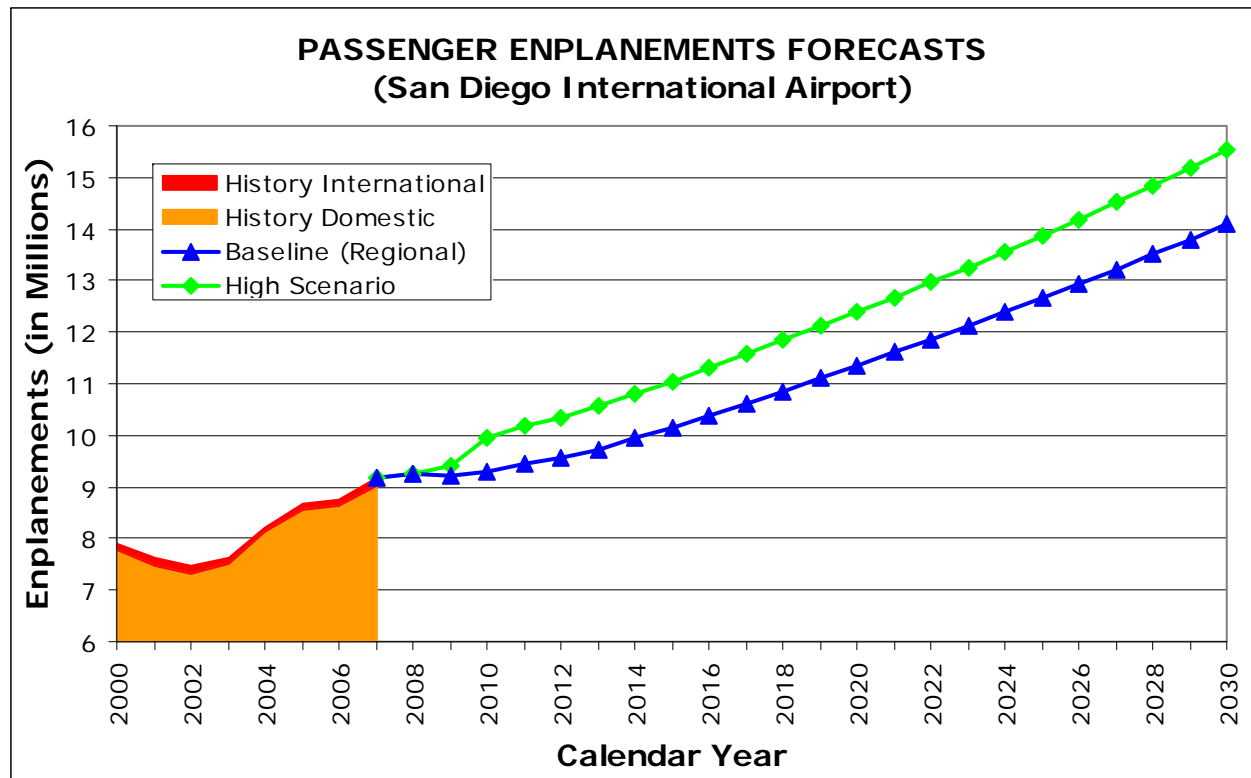
Commercial Activity Forecasts

San Diego International Airport

- SDIA is one of the two airports with commercial service in San Diego County besides McClellan-Palomar
- Destination Lindbergh passenger forecast driven principally by domestic O&D activity (90% of enplanements in 2007)
 - Regression of domestic O&D passengers against personal income and fare/mile (yield)
 - Assumptions regarding price of fuel drive future fares
 - Baseline, high, and low scenarios prepared with different fuel price assumptions
- Historical deployment of narrowbody jets will continue
- Small RJs replaced by larger RJs
- Additional widebody aircraft as international service expands
- In general, load factors increase

Passenger Enplanements Forecast

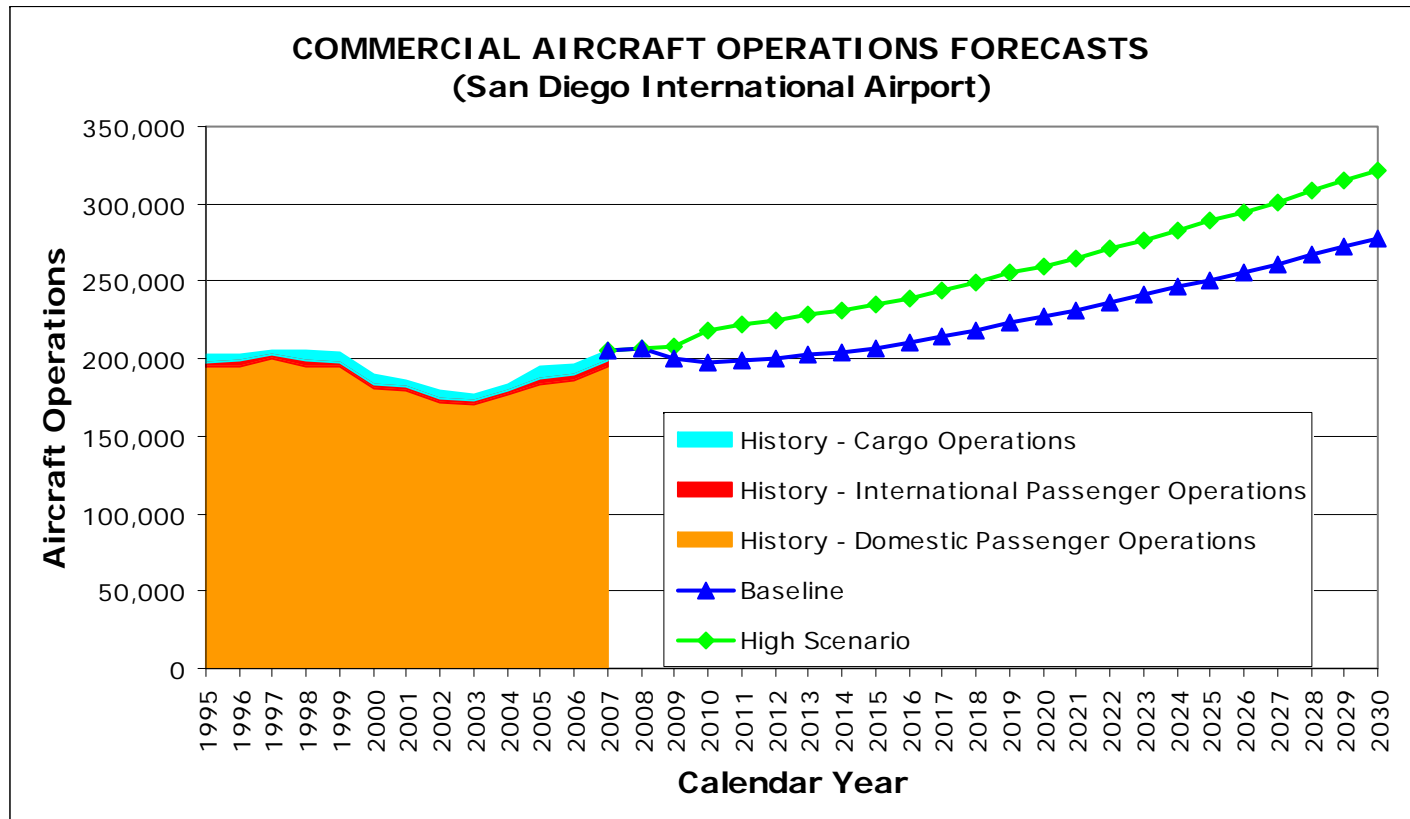
San Diego International Airport



Source: *Destination Lindbergh, The Ultimate Build-out, Aviation Activity Forecast, Draft August 2008*

Commercial Operations Forecast

San Diego International Airport



Source: *Destination Lindbergh, The Ultimate Build-out, Aviation Activity Forecast, Draft August 2008*

Commercial Activity Forecasts

McClellan-Palomar Airport

- **McClellan-Palomar is the only county-operated airport with commercial service:**
 - **Scheduled passenger service**
 - **No scheduled air cargo**
- **Baseline and high forecast prepared**
- **Baseline Scenario:**
 - **Assumes no airfield improvements**
- **High Scenario:**
 - **Assumes future airfield improvements**

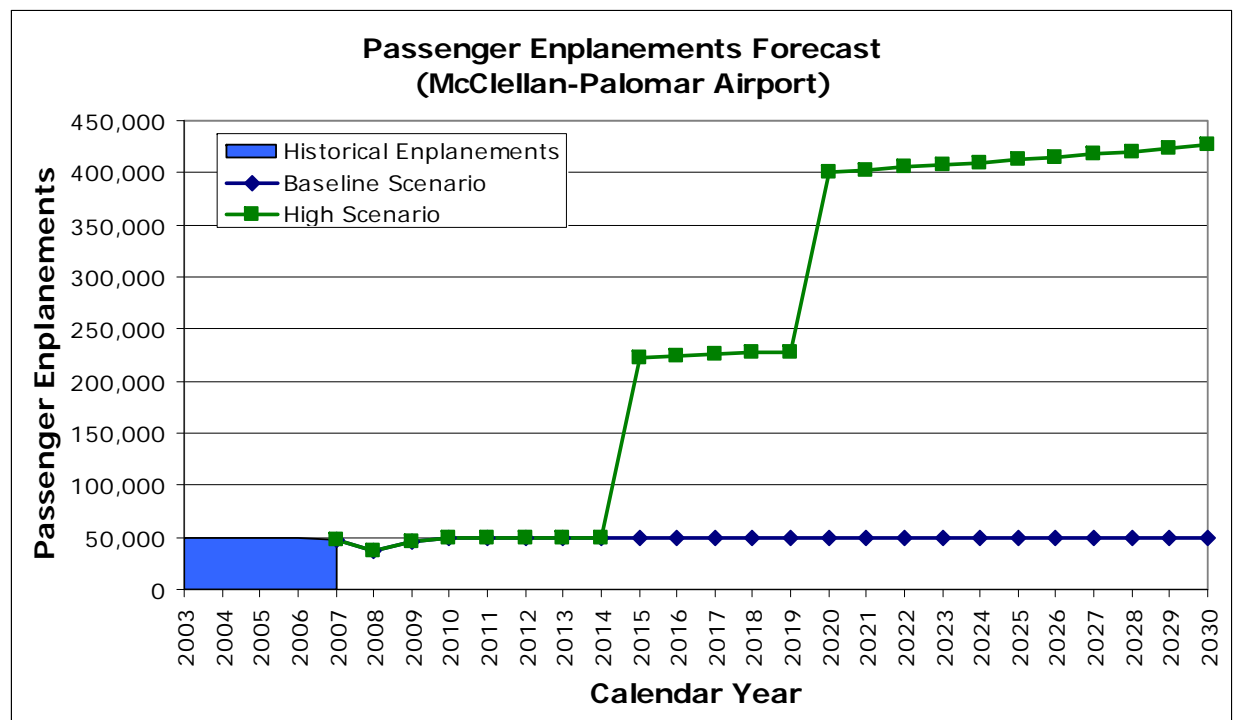
Passenger Enplanements Forecast

McClellan-Palomar Airport

- **Baseline scenario:** Passenger enplanements expected to increase to 2006 level and remain unchanged through 2030

- **High Scenario:**
Assumes 6 new daily flights in 2015 and 6 additional flights in 2020

- Potential future markets include LAS, PHX, SFO, and DEN



Sources: FAA, Air Carrier Activity Information System (ACAIS); USDOT, Schedule T-100; Landrum & Brown analysis

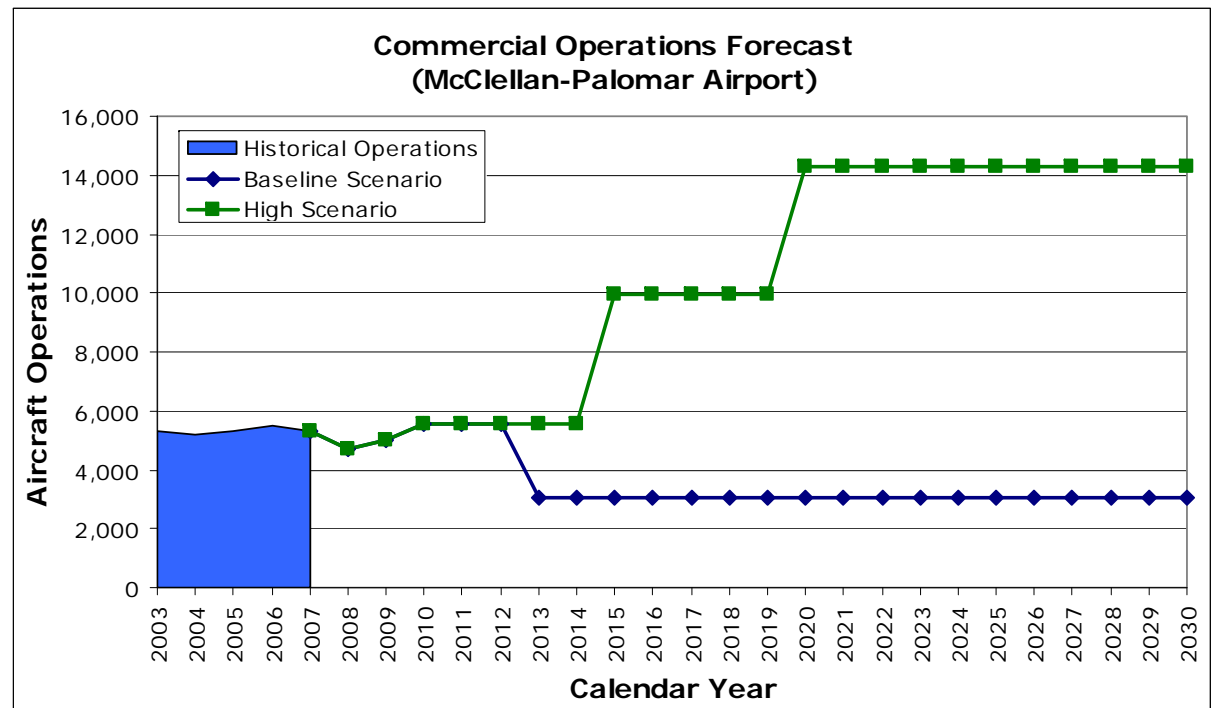
Aircraft Operations Forecast

McClellan-Palomar Airport

- **Baseline scenario:** Assumes SkyWest will replace the EMB120 with a CRJ200 (or similar aircraft) by 2013

- **High Scenario:**
Assumes continued use of the EMB120 through 2012

- By 2013 fleet is replaced with CRJ200, Q400 and EMB170
- By 2020 CRJ200 is replaced with EMB190



Sources: FAA, Air Carrier Activity Information System (ACAIS); USDOT, Schedule T-100; Landrum & Brown analysis

Operations Fleet Mix Forecast

McClellan-Palomar Airport

■ Baseline Scenario:

<u>Aircraft</u>	<u>Percent of Total Passenger Operations</u>						
	<u>2007</u>	<u>2008</u>	<u>2010</u>	<u>2015</u>	<u>2020</u>	<u>2025</u>	<u>2030</u>
Commuter							
CRJ	0.0%	0.0%	0.0%	100.0%	100.0%	100.0%	100.0%
DH8	14.9%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%
EM2	85.1%	98.1%	100.0%	0.0%	0.0%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Sources: *Official Airline Guide*; Landrum & Brown analysis

■ High Scenario:

<u>Aircraft</u>	<u>Percent of Total Passenger Operations</u>						
	<u>2007</u>	<u>2008</u>	<u>2010</u>	<u>2015</u>	<u>2020</u>	<u>2025</u>	<u>2030</u>
Air Carrier	0.0%	0.0%	0.0%	66.7%	100.0%	100.0%	100.0%
E90	0.0%	0.0%	0.0%	0.0%	33.3%	33.3%	33.3%
Q400	0.0%	0.0%	0.0%	33.3%	33.3%	33.3%	33.3%
E70	0.0%	0.0%	0.0%	33.3%	33.3%	33.3%	33.3%
Commuter	100.0%	100.0%	100.0%	33.3%	0.0%	0.0%	0.0%
CRJ	0.0%	0.0%	0.0%	33.3%	0.0%	0.0%	0.0%
DH8	14.9%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%
EM2	85.1%	98.1%	100.0%	0.0%	0.0%	0.0%	0.0%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Sources: *Official Airline Guide*; Landrum & Brown analysis



Air Taxi and General Aviation Forecasts

Air Taxi and General Aviation Aircraft Operations Forecast Methodology

- **Methodology 1 – County-wide Operations Per Based Aircraft**
 - Assume 2007 operations per based aircraft remains constant at each airport through 2030
- **Methodology 2 – County-wide Regression**
 - Assume Air Taxi and General Aviation activity linked to economy
 - Regress operations against personal income
- **Methodology 3 – Individual Airport Forecasts**
 - Evaluate each airport individually based on historical trends, foreseeable changes, and nationwide industry trends

Methodology 1 – County-wide Operations Per Based Aircraft

Historical (2007) Based Aircraft

- 2007 estimates based on the most current number of based aircraft from various sources for each airport

<u>Facility</u>	<u>Code</u>	2007 Based Aircraft					<u>Total</u>
		<u>Single-engine</u>	<u>Multi-engine</u>	<u>Turboprop / Jets</u>	<u>Helicopters</u>	<u>Other</u>	
San Diego International Airport	SAN	-	3	4	-	-	7
McClellan-Palomar Airport	CRO	221	37	74	12	-	344
Montgomery Field Airport	MYF	495	59	13	37	-	604
Gillespie Field Airport	SEE	841	73	16	43	5	978
Brown Field Municipal Airport	SDM	159	15	14	2	-	190
Ramona Airport	RNM	174	10	1	25	-	210
Oceanside Municipal Airport	OKB	59	5	-	2	-	66
Fallbrook Community Airpark	L18	117	5	-	2	-	124
Borrego Valley Airport	L08	23	-	-	-	-	23
Agua Caliente Airport	L54	1	-	-	-	-	1
Ocotillo Airport	L90	-	-	-	-	-	-
Jacumba Airport	L78	-	-	-	-	-	-
Total		2,090	207	122	123	5	2,547
% Share		82.1%	8.1%	4.8%	4.8%	0.2%	100.0%

Sources: Airport Records; Airport Land Use Compatibility Plans (ALUCP) Landrum & Brown analysis

Methodology 1 – County-wide Operations Per Based Aircraft

2030 Forecast Based Aircraft – Baseline

- Based aircraft projected based on growth rates for each aircraft category from *FAA Aerospace Forecast, Fiscal Years 2008-2025* active aircraft forecast

		2030 Based Aircraft - Baseline					
<u>Facility</u>	<u>Code</u>	<u>Single-engine</u>	<u>Multi-engine</u>	<u>Turboprop / Jets</u>	<u>Helicopters</u>	<u>Other</u>	<u>Total</u>
San Diego International Airport	SAN	-	2	10	-	-	12
McClellan-Palomar Airport	CRQ	254	30	177	23	-	484
Montgomery Field Airport	MYF	569	47	31	71	-	719
Gillespie Field Airport	SEE	965	59	36	53	9	1,122
Brown Field Municipal Airport	SDM	183	12	34	4	-	232
Ramona Airport	RNM	200	8	2	48	-	259
Oceanside Municipal Airport	OKB	68	4	-	4	-	76
Fallbrook Community Airpark	L18	135	4	-	4	-	142
Borrego Valley Airport	L08	26	-	-	-	-	26
Agua Caliente Airport	L54	1	-	-	-	-	1
Ocotillo Airport	L90	-	-	-	-	-	-
Jacumba Airport	L78	-	-	-	-	-	-
Total		2,401	166	290	207	9	3,073
% Share		78.1%	5.4%	9.4%	6.7%	0.3%	100.0%
AAG 2007-2030		0.6%	-0.9%	3.8%	2.3%	2.6%	0.8%

Note: Gillespie used 2008 actual based aircraft as a base

Sources: *FAA Aerospace Forecasts*, Fiscal Years 2008-2025; Landrum & Brown analysis

Methodology 1 – County-wide Operations Per Based Aircraft

2030 Forecast Based Aircraft – High Scenario

- Based aircraft projected based on development plans for Gillespie, Brown Field, Ramona and Oceanside
- Based aircraft for other airports were the same level as baseline

		2030 Based Aircraft - High Scenario					
<u>Facility</u>	<u>Code</u>	<u>Single-engine</u>	<u>Multi-engine</u>	<u>Turboprop / Jets</u>	<u>Helicopters</u>	<u>Other</u>	<u>Total</u>
San Diego International Airport	SAN	-	2	10	-	-	12
McClellan-Palomar Airport	CRQ	254	30	177	23	-	484
Montgomery Field Airport	MYF	569	47	31	71	-	719
Gillespie Field Airport	SEE	1,198	73	16	29	9	1,325
Brown Field Municipal Airport	SDM	419	30	87	30	-	566
Ramona Airport	RNM	288	13	2	48	-	350
Oceanside Municipal Airport	OKB	168	11	-	7	-	187
Fallbrook Community Airpark	L18	135	4	-	4	-	142
Borrego Valley Airport	L08	26	-	-	-	-	26
Agua Caliente Airport	L54	1	-	-	-	-	1
Ocotillo Airport	L90	-	-	-	-	-	-
Jacumba Airport	L78	-	-	-	-	-	-
Total		3,058	210	323	212	9	3,812
% Share		80.2%	5.5%	8.5%	5.6%	0.2%	100.0%
AAG 2007-2030		1.7%	0.1%	4.3%	2.4%	2.6%	1.8%

Sources: FAA Aerospace Forecasts, Fiscal Years 2008-2025; Unconstrained Gillespie Field Aviation Activity Forecasts Master Plan, September 2008; Airport Development Plans; Landrum & Brown analysis

Methodology 1 – County-wide Operations Per Based Aircraft

Operations Forecast

- Assumes 2007 operations per based aircraft at each airport remain constant through 2030

<u>Airport</u>	<u>Code</u>	<u>AT & GA Operations</u>				
		<u>2007</u>	<u>Baseline</u>		<u>High Scenario</u>	
			<u>2030</u>	<u>AAG</u>	<u>2030</u>	<u>AAG</u>
San Diego International Airport	SAN	23,645	40,500	2.4%	40,500	2.4%
McClellan-Palomar Airport	CRO	205,042	288,500	1.5%	288,500	1.5%
Montgomery Field Airport	MYF	221,585	263,700	0.8%	263,700	0.8%
Gillespie Field Airport	SEE	294,027	337,300	0.6%	398,300	1.3%
Brown Field Municipal Airport	SDM	137,745	168,400	0.9%	410,400	4.9%
Ramona Airport	RNM	163,479	201,300	0.9%	272,700	2.2%
Oceanside Municipal Airport	OKB	14,128	16,200	0.6%	39,900	4.6%
Fallbrook Community Airpark	L18	33,286	38,200	0.6%	38,200	0.6%
Borrego Valley Airport	L08	26,251	30,200	0.6%	30,200	0.6%
Agua Caliente Airport	L54	700	700	0.0%	700	0.0%
Ocotillo Airport	L90	800	800	0.0%	800	0.0%
Jacumba Airport	L78	<u>325</u>	<u>325</u>	0.0%	<u>325</u>	0.0%
Total		1,121,013	1,386,125	0.9%	1,784,225	2.0%

Source: Landrum & Brown analysis

Methodology 2 – County-wide Regression

Operations Forecast

- Regression of 7 airports with reliable historical operations data and consistent trends (SDIA, McClellan-Palomar, Gillespie, Brown Field, Montgomery Field, Fallbrook, and Borrego Valley)
- Regressed personal income against historical operations

	Calendar Year	Personal Income (Millions; 2004\$)	7 Airports GA Operations
<u>Actual</u>	1995	\$83,966	749,145
	2000	\$107,623	816,051
	2001	\$107,481	749,006
	2002	\$108,353	812,213
	2003	\$106,572	742,378
	2004	\$112,105	801,325
	2005	\$115,958	885,672
	2006	\$118,964	906,765
<u>Estimate</u>	2007	\$121,802	941,581
	2008	\$125,357	895,900
<u>Forecast</u>	2010	\$132,129	922,000
	2015	\$151,927	998,400
	2020	\$168,590	1,062,800
	2025	\$183,813	1,121,500
	2030	\$205,972	1,207,100
<u>Average Annual Growth Rate:</u>			
	1995-2000	5.1%	1.7%
	2000-2007	1.8%	2.1%
	2007-2010	2.7%	-0.7%
	2010-2020	2.5%	1.4%
	2020-2030	2.0%	1.3%
	2007-2030	2.3%	1.1%

Sources: SANDAG; FAA, ATADS; FAA, TAF 2007; San Diego County, Department of Public Works; Airport staff; Landrum & Brown analysis

Methodology 3 – Individual Airport Forecasts

Operations Forecast

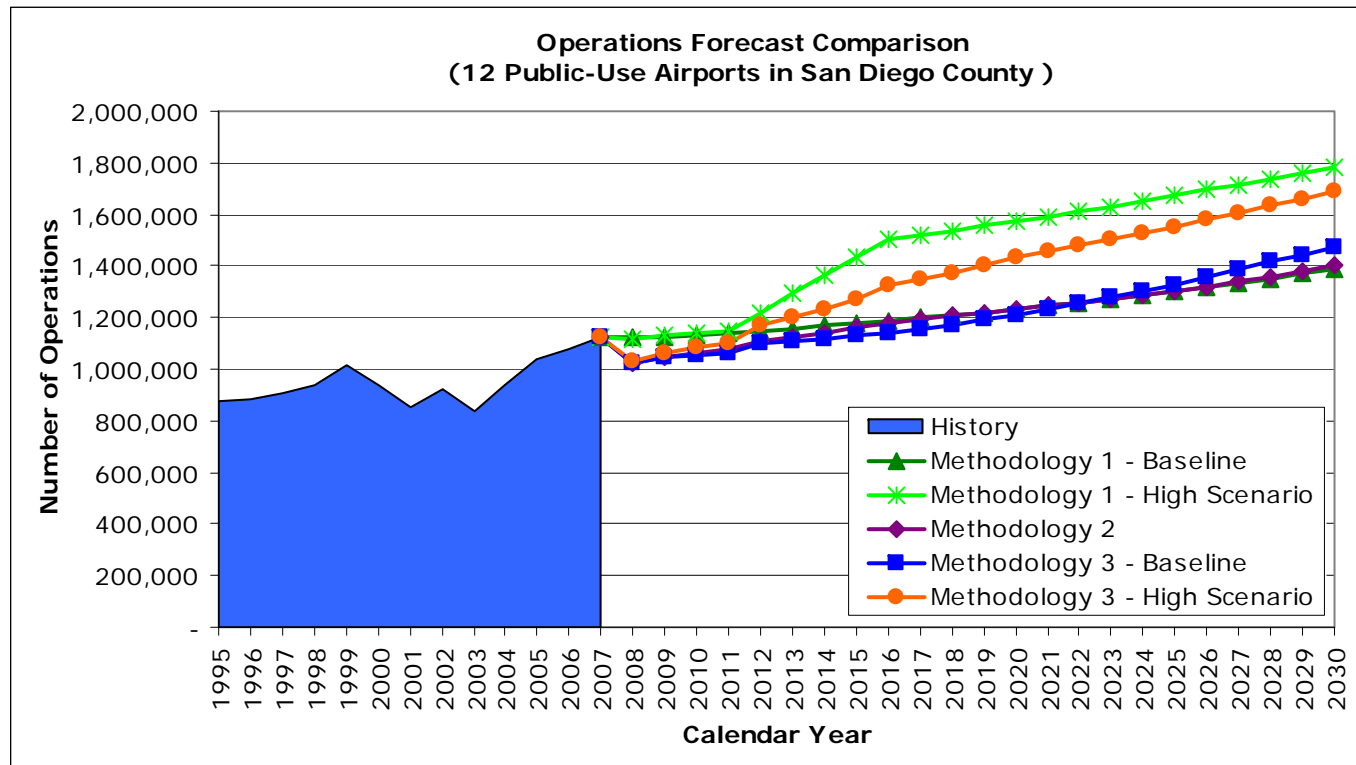
- By combining the 12 individual airport forecasts, total Air Taxi/GA operations for San Diego airport system are forecast to increase at 1.2% AAG for Baseline and 1.8% AAG for high scenario

<u>Airport</u>	<u>Code</u>	<u>AT & GA Operations</u>				
		<u>2007</u>	<u>Baseline</u>		<u>High Scenario</u>	
			<u>2030</u>	<u>AAG</u>	<u>2030</u>	<u>AAG</u>
San Diego International Airport	SAN	23,645	32,000	1.3%	42,100	2.5%
McClellan-Palomar Airport	CRO	205,042	264,000	1.1%	264,000	1.1%
Montgomery Field Airport	MYF	221,585	271,500	0.9%	271,500	0.9%
Gillespie Field Airport	SEE	294,027	460,800	2.0%	489,400	2.2%
Brown Field Municipal Airport	SDM	137,745	170,300	0.9%	275,900	3.1%
Ramona Airport	RNM	163,479	192,100	0.7%	241,100	1.7%
Oceanside Municipal Airport	OKB	14,128	18,200	1.1%	36,500	4.2%
Fallbrook Community Airpark	L18	33,286	43,200	1.1%	43,200	1.1%
Borrego Valley Airport	L08	26,251	22,400	-0.7%	22,400	-0.7%
Agua Caliente Airport	L54	700	700	0.0%	700	0.0%
Ocotillo Airport	L90	800	800	0.0%	800	0.0%
Jacumba Airport	L78	325	325	0.0%	325	0.0%
Total		1,121,013	1,476,325	1.2%	1,687,925	1.8%

Sources: FAA, ATADS; County of San Diego, Department of Public Works; *Unconstrained Gillespie Field Aviation Activity Forecasts Master Plan*, September 2008; Airport Staff; Airport Records; Landrum & Brown analysis.

County-wide Air Taxi & General Aviation Forecasts Comparison

- **Methodology 3 is preferred due to considerations given to each individual airport**



Methodology 1 – County-wide Operations Per Based Aircraft

Methodology 2 – County-wide Regression (includes independent forecasts for Ramona, Oceanside, Agua Caliente, Ocotillo, and Jacumba)

Methodology 3 – Individual Airport Forecasts

Source: Landrum & Brown analysis

San Diego International Airport

Methodology 3 – Individual Airport Forecasts

- 10% of SDIA operations were Air Taxi/GA in 2007
- Baseline forecast:
 - Regression of county operations against PI
 - Assume SDIA share of county operations decreases from 1.8% in 2008 to 1.6% by 2030
- High scenario:
 - Apply FAA hours flown growth rates (2.5% annual growth)

		Air Taxi and GA Operations	
	Calendar Year	Baseline Scenario	High Scenario
<u>Actual</u>	2000	16,759	16,759
	2001	18,942	18,942
	2002	25,789	25,789
	2003	24,497	24,497
	2004	24,150	24,150
	2005	24,595	24,595
	2006	24,209	24,209
<u>Estimate</u> <u>Forecast</u>	2007	23,645	23,645
	2008	21,500	21,500
	2010	22,500	22,700
	2015	25,400	26,500
	2020	27,600	30,900
	2025	29,300	36,100
	2030	32,000	42,100
<u>Average Annual Growth Rate:</u>			
	2000-2007	5.0%	5.0%
	2007-2010	-1.6%	-1.3%
	2010-2020	2.1%	3.1%
	2020-2030	1.5%	3.1%
	2007-2030	1.3%	2.5%

Source: Destination Lindbergh, The Ultimate Build-out, Aviation Activity Forecast, Draft August 2008

McClellan-Palomar Airport

Methodology 3 – Individual Airport Forecasts

- Air Taxi operations reach 2007 level by 2010 and increase at an average annual rate of 2.8% from 2010 to 2030, based on FAA growth rates for Air Taxi operations
- Itinerant GA operations grow at based on FAA national itinerant GA operations forecast
- Local GA operations remain at 2008 levels through 2030

	Calendar	Air Taxi	GA Operations		AT & GA
	<u>Year</u>	<u>Operations</u>	<u>Itinerant</u>	<u>Local</u>	<u>Operations</u>
<u>Actual</u>	2000	6,322	152,184	78,405	236,911
	2001	6,770	131,284	70,671	208,725
	2002	7,591	126,266	62,918	196,775
	2003	7,891	121,026	57,182	186,099
	2004	9,238	124,213	67,664	201,115
	2005	9,353	120,128	72,396	201,877
	2006	12,699	125,723	53,073	191,495
	2007	12,211	132,111	60,720	205,042
<u>Estimate</u>	2008	9,500	120,700	64,500	194,700
<u>Forecast</u>	2010	12,200	125,000	64,500	201,700
	2015	14,500	135,500	64,500	214,500
	2020	16,700	147,900	64,500	229,100
	2025	18,800	161,600	64,500	244,900
	2030	21,100	178,400	64,500	264,000
<u>Average Annual Growth Rate:</u>					
	2000-2007	9.9%	-2.0%	-3.6%	-2.0%
	2007-2010	0.0%	-1.8%	2.0%	-0.5%
	2010-2020	3.2%	1.7%	0.0%	1.3%
	2020-2030	2.4%	1.9%	0.0%	1.4%
	2007-2030	2.4%	1.3%	0.3%	1.1%

Note: 2008 is annualized from January-July 2008 data. 2008 Air Taxi activity is annualized from January-May 2008 data.

Sources: FAA, ATADS; USDOT, Schedule T-100; *Official Airline Guide*; Landrum & Brown analysis

Montgomery Field Airport

Methodology 3 – Individual Airport Forecasts

- Air Taxi operations expected to continue to decline but slower than historical rates
- Itinerant GA forecast to hold constant at 2008 levels through 2030
- Local GA projected based on national FAA local operations forecast

	Calendar Year	Air Taxi Operations	GA Operations		AT & GA Operations
			Itinerant	Local	
<u>Actual</u>	2000	7,729	142,160	101,575	251,464
	2001	6,831	123,505	84,547	214,883
	2002	5,438	143,058	96,847	245,343
	2003	4,723	127,645	83,983	216,351
	2004	3,950	130,051	95,350	229,351
	2005	3,739	126,780	114,511	245,030
	2006	3,756	122,732	104,965	231,453
	2007	3,428	121,088	97,069	221,585
<u>Estimate</u>	2008	2,800	129,200	114,800	246,800
<u>Forecast</u>	2010	2,700	129,200	118,200	250,100
	2015	2,400	129,200	119,000	250,600
	2020	2,200	129,200	124,000	255,400
	2025	2,000	129,200	131,200	262,400
	2030	1,800	129,200	140,500	271,500
	<u>Average Annual Growth Rate:</u>				
	2000-2007	-11.0%	-2.3%	-0.6%	-1.8%
	2007-2010	-7.6%	2.2%	6.8%	4.1%
	2010-2020	-2.0%	0.0%	0.5%	0.2%
	2020-2030	-2.0%	0.0%	1.3%	0.6%
	2007-2030	-2.8%	0.3%	1.6%	0.9%

Note: 2008 is annualized from January-July 2008 data.

Sources: FAA, ATADS; Landrum & Brown analysis

Gillespie Field Airport

Methodology 3 – Individual Airport Forecasts

- There is little to no Air Taxi activity at Gillespie

- Master Plan forecast is adopted

- **Baseline:**

- Forecast developed using a multi-linear regression model based on socioeconomic variables (San Diego County population, employment, and personal income)

- **High Scenario:**

- Based on a linear trend analysis

	Calendar Year	General Aviation Operations					
		Baseline			High Scenario		
		Itinerant	Local	Total	Itinerant	Local	Total
Actual	2000	88,137	99,540	187,677	88,137	99,540	187,677
	2001	79,470	95,851	175,321	79,470	95,851	175,321
	2002	82,347	100,574	182,921	82,347	100,574	182,921
	2003	78,947	101,345	180,292	78,947	101,345	180,292
	2004	77,454	130,456	207,910	77,454	130,456	207,910
	2005	94,376	147,789	242,165	94,376	147,789	242,165
	2006	112,475	165,905	278,380	112,475	165,905	278,380
Estimate Forecast	2007	119,950	174,077	294,027	119,950	174,077	294,027
	2008	103,100	158,800	261,900	106,700	164,300	271,000
	2010	101,300	164,700	266,000	110,700	179,900	290,600
	2015	103,600	174,300	277,900	126,600	213,000	339,600
	2020	117,300	197,500	314,800	144,800	243,800	388,600
	2025	140,200	235,900	376,100	163,100	274,500	437,600
	2030	171,700	289,100	460,800	182,400	307,000	489,400
Average Annual Growth Rate:							
2000-2007		4.5%	8.3%	6.6%	4.5%	8.3%	6.6%
2007-2010		-5.5%	-1.8%	-3.3%	-2.6%	1.1%	-0.4%
2010-2020		1.5%	1.8%	1.7%	2.7%	3.1%	2.9%
2020-2030		3.9%	3.9%	3.9%	2.3%	2.3%	2.3%
2007-2030		1.6%	2.2%	2.0%	1.8%	2.5%	2.2%

Note: Data from 2028 to 2030 were projected based on an average annual growth rate between 2015 and 2027.

Sources: *Unconstrained Gillespie Field Aviation Activity Forecasts Master Plan*, September 2008; Landrum & Brown analysis.

Brown Field Airport

Methodology 3 – Individual Airport Forecasts

- Baseline for Air Taxi and Itinerant GA projected based on trend analyses
- Local GA projected based on national FAA local operations forecast
- High scenario based on market stimulation in 2012 - 2016 from airport development that includes high-end FBO

	Calendar Year	Baseline				High Scenario			
		General Aviation				General Aviation			
		Air Taxi	Itinerant	Local	Total	Air Taxi	Itinerant	Local	Total
<u>Actual</u>	2000	133	16,291	91,888	108,312	133	16,291	91,888	108,312
	2001	299	21,397	94,512	116,208	299	21,397	94,512	116,208
	2002	542	38,457	91,199	130,198	542	38,457	91,199	130,198
	2003	972	31,024	65,297	97,293	972	31,024	65,297	97,293
	2004	1,837	27,330	68,207	97,374	1,837	27,330	68,207	97,374
	2005	2,426	27,014	79,987	109,427	2,426	27,014	79,987	109,427
	2006	3,405	33,181	91,203	127,789	3,405	33,181	91,203	127,789
<u>Estimate Forecast</u>	2007	3,615	37,690	96,440	137,745	3,615	37,690	96,440	137,745
	2008	4,100	37,800	73,300	115,200	4,100	37,800	73,300	115,200
	2010	4,600	40,900	75,400	120,900	4,600	40,900	75,400	120,900
	2015	5,800	48,400	76,000	130,200	8,000	79,900	106,500	194,400
	2020	7,000	56,000	79,100	142,100	10,200	98,300	121,400	229,900
	2025	8,300	63,600	83,800	155,700	12,000	111,400	128,500	251,900
	2030	9,500	71,100	89,700	170,300	13,800	124,500	137,600	275,900
	<u>Average Annual Growth Rate:</u>								
	2000-2007	60.3%	12.7%	0.7%	3.5%	60.3%	12.7%	0.7%	3.5%
	2007-2010	8.4%	2.8%	-7.9%	-4.3%	8.4%	2.8%	-7.9%	-4.3%
	2010-2020	4.3%	3.2%	0.5%	1.6%	8.3%	9.2%	4.9%	6.6%
	2020-2030	3.1%	2.4%	1.3%	1.8%	3.1%	2.4%	1.3%	1.8%
	2007-2030	4.3%	2.8%	-0.3%	0.9%	6.0%	5.3%	1.6%	3.1%

Note: 2008 is annualized from January-July 2008 data.

Sources: FAA, ATADS; Landrum & Brown analysis

Ramona Airport

Methodology 3 – Individual Airport Forecasts

- **No Air Taxi activity at Ramona**
- **Baseline Forecast:**
 - **By 2012, Itinerant GA reaches 2007 level and Local GA reaches 2006 level**
 - **Itinerant and local GA operations increase based on FAA growth rates for GA**
- **High Forecast:**
 - **Market stimulation in 2016 through 2020 in reflecting “Ramona Air Center”**

	Calendar Year	General Aviation Operations					
		Baseline			High Scenario		
		<u>Itinerant</u>	<u>Local</u>	<u>Total</u>	<u>Itinerant</u>	<u>Local</u>	<u>Total</u>
<u>Actual</u>	2000	n.a.	n.a.	132,407	n.a.	n.a.	132,407
	2001	n.a.	n.a.	110,413	n.a.	n.a.	110,413
	2002	n.a.	n.a.	106,429	n.a.	n.a.	106,429
	2003	n.a.	n.a.	95,328	n.a.	n.a.	95,328
	2004	40,238	81,033	121,271	40,238	81,033	121,271
	2005	37,084	102,802	139,886	37,084	102,802	139,886
	2006	39,727	113,771	153,498	39,727	113,771	153,498
<u>Estimate Forecast</u>	2007	41,647	121,832	163,479	41,647	121,832	163,479
	2008	30,400	95,100	125,500	30,400	95,100	125,500
	2010	39,200	97,900	137,100	39,200	97,900	137,100
	2015	43,300	114,500	157,800	43,300	114,500	157,800
	2020	47,200	119,200	166,400	87,800	119,200	207,000
	2025	51,600	126,200	177,800	96,000	126,200	222,200
	2030	56,900	135,100	192,000	106,000	135,100	241,100
	<u>Average Annual Growth Rate:</u>						
	2000-2007	n.a.	n.a.	3.1%	n.a.	n.a.	3.1%
	2007-2010	-2.0%	-7.0%	-5.7%	-2.0%	-7.0%	-5.7%
	2010-2020	1.9%	2.0%	2.0%	8.4%	2.0%	4.2%
	2020-2030	1.9%	1.3%	1.4%	1.9%	1.3%	1.5%
	2007-2030	1.4%	0.5%	0.7%	4.1%	0.5%	1.7%

Notes: 2008 is annualized from January-July 2008 data. Data from 2000 to 2003 are based on TAF.

Sources: FAA, ATADS; FAA, TAF 2007; Landrum & Brown analysis

Oceanside Municipal Airport

Methodology 3 – Individual Airport Forecasts

- **No Air Taxi or military activity at Oceanside**
- **Baseline:**
 - **GA operations expected to recover and reach the 2007 levels in 2012**
- **High Scenario:**
 - **GA operations increase back to 2007 level in 2009 and market stimulations in 2012 through 2016 due to the proposed construction completion**
- **Then projected based on FAA Aerospace Forecast, Fiscal Years 2008-2025 for GA operations**

	Calendar Year	General Aviation Operations	
		Baseline	High Scenario
<u>Actual</u>	2004	11,233	11,233
	2005	11,609	11,609
	2006	14,352	14,352
	2007	14,128	14,128
<u>Estimate</u>	2008	11,600	11,600
<u>Forecast</u>	2010	12,000	14,400
	2015	14,500	26,600
	2020	15,500	31,000
	2025	16,600	33,400
	2030	18,200	36,500
<u>Average Annual Growth Rate:</u>			
	2004-2007	7.9%	7.9%
	2007-2010	-5.3%	0.6%
	2010-2020	2.6%	8.0%
	2020-2030	1.6%	1.6%
	2007-2030	1.1%	4.2%

Notes: Data do not include night operations, 2008 estimate is annualized based on data from the month of August 2008.

Sources: Airport Staff; Landrum & Brown analysis

Fallbrook Community Airpark

Methodology 3 – Individual Airport Forecasts

- ***Fallbrook Community Airpark Master Plan 2006*** not adopted for this study
- **GA activity at Fallbrook projected based on *FAA Aerospace Forecast, Fiscal Years 2008-2025* for GA operations and assumed to reach 2007 level by 2012**

	Calendar Year	General Aviation Operations
<u>Actual</u>	2002	20,896
	2003	18,292
	2004	22,728
	2005	36,124
	2006	32,586
	2007	33,286
	2008	22,302
<u>Estimate Forecast</u>	2010	23,000
	2015	34,300
	2020	36,700
	2025	39,600
	2030	43,200
	<u>Average Annual Growth Rate:</u>	
	2002-2007	9.8%
	2007-2010	-11.6%
	2010-2020	4.8%
	2020-2030	1.6%
	2007-2030	1.1%

Notes: Data from 2002 to 2006 are based on the based on the Master Plan. Data for 2007 based on San Diego County operations count.

Sources: *Fallbrook Community Airpark Master Plan*, March 2006; San Diego County, Department of Public Works; Landrum & Brown analysis

Borrego Valley, Agua Caliente, Ocotillo, and Jacumba Airports

Methodology 3 – Individual Airport Forecasts

- No ATCT at these airports
- GA activity at Borrego Valley, Agua Caliente, Ocotillo, and Jacumba airports projected to remain constant

	Calendar Year	General Aviation Operations			
		<u>Borrego Valley</u>	<u>Agua Caliente</u>	<u>Ocotillo</u>	<u>Jacumba</u>
<u>Actual</u>	2000	6,127	n.a.	n.a.	n.a.
	2001	6,127	n.a.	n.a.	n.a.
	2002	10,291	n.a.	n.a.	n.a.
	2003	19,554	452	246	1,626
	2004	18,697	500	250	1,500
	2005	26,454	650	405	325
	2006	20,853	650	405	325
	2007	26,251	700	800	325
<u>Forecast</u>	2010	22,400	700	800	325
	2015	22,400	700	800	325
	2020	22,400	700	800	325
	2025	22,400	700	800	325
	2030	22,400	700	800	325
	<u>Average Annual Growth Rate:</u>				
	2000-2007	23.1%	n.a.	n.a.	n.a.
	2007-2010	-5.2%	0.0%	0.0%	0.0%
	2010-2020	0.0%	0.0%	0.0%	0.0%
	2020-2030	0.0%	0.0%	0.0%	0.0%
	2007-2030	-0.7%	0.0%	0.0%	0.0%

Notes: Data from 2003 to 2007 are based on the San Diego County operations count. Data for 2000 and 2002 for Borrego Valley from TAF.

Sources: FAA, TAF 2007; County of San Diego, Department of Public works; Landrum & Brown analysis

Air Taxi & GA Forecast (Baseline)

12 Public-Use Airports in San Diego County

Calendar		Air Taxi & General Aviation Operations - Baseline												
	Year	SDIA	CRO	MYF	SEE	SDM	RNM	OKB	L18	L08	L54	L90	L78	Total
Actual	2000	16,759	236,911	251,464	187,677	108,312	132,407	n.a.	n.a.	6,127	n.a.	n.a.	n.a.	939,658
	2001	18,942	208,725	214,883	175,321	116,208	110,413	n.a.	n.a.	6,127	n.a.	n.a.	n.a.	850,619
	2002	25,789	196,775	245,343	182,921	130,198	106,429	n.a.	20,896	10,291	n.a.	n.a.	n.a.	918,641
	2003	24,497	186,099	216,351	180,292	97,293	95,328	n.a.	18,292	19,554	452	246	1,626	840,030
	2004	24,150	201,115	229,351	207,910	97,374	121,271	11,233	22,728	18,697	500	250	1,500	936,078
	2005	24,595	201,877	245,030	242,165	109,427	139,886	11,609	36,124	26,454	650	405	325	1,038,547
	2006	24,209	191,495	231,453	278,380	127,789	153,498	14,352	32,586	20,853	650	405	325	1,075,995
	2007	23,645	205,042	221,585	294,027	137,745	163,479	14,128	33,286	26,251	700	800	325	1,121,013
Estimate	2008	21,500	194,600	246,700	261,900	115,200	125,500	11,600	22,300	22,400	700	800	325	1,023,525
Forecast	2010	22,500	201,700	250,000	266,000	120,900	137,100	12,000	23,000	22,400	700	800	325	1,057,425
	2015	25,400	214,500	250,700	277,900	130,200	157,700	14,500	34,300	22,400	700	800	325	1,129,425
	2020	27,600	229,100	255,300	314,800	142,100	166,400	15,500	36,700	22,400	700	800	325	1,211,725
	2025	29,300	244,900	262,400	376,100	155,700	177,800	16,600	39,600	22,400	700	800	325	1,326,625
	2030	32,000	264,000	271,500	460,800	170,300	192,100	18,200	43,200	22,400	700	800	325	1,476,325
Average Annual Growth Rate:														
	2000-2007	5.0%	-2.0%	-1.8%	6.6%	3.5%	3.1%	n.a.	n.a.	23.1%	n.a.	n.a.	n.a.	2.6%
	2007-2010	-1.6%	-0.5%	4.1%	-3.3%	-4.3%	-5.7%	-5.3%	-11.6%	-5.2%	0.0%	0.0%	0.0%	-1.9%
	2010-2020	2.1%	1.3%	0.2%	1.7%	1.6%	2.0%	2.6%	4.8%	0.0%	0.0%	0.0%	0.0%	1.4%
	2020-2030	1.5%	1.4%	0.6%	3.9%	1.8%	1.4%	1.6%	1.6%	0.0%	0.0%	0.0%	0.0%	2.0%
	2007-2030	1.3%	1.1%	0.9%	2.0%	0.9%	0.7%	1.1%	1.1%	-0.7%	0.0%	0.0%	0.0%	1.2%

Sources: FAA, ATADS; USDOT, Schedule T-100; *Official Airline Guide*; *Unconstrained Gillespie Field Aviation Activity Forecasts Master Plan*, September 2008; San Diego County, Department of Public Works; Landrum & Brown analysis

Legend:

SDIA – San Diego International Airport	SEE – Gillespie Field	OKB – Oceanside Municipal Airport	L54 – Agua Caliente Airport
CRO – McClellan-Palomar Airport	SDM – Brown Field Municipal Airport	L18 – Fallbrook Community Airpark	L90 – Ocotillo Airport
MYF – Montgomery Field	RNM – Ramona Airport	L08 – Borrego Valley Airport	L78 – Jacumba Airport

Air Taxi & GA Forecast (High Scenario)

12 Public-Use Airports in San Diego County

Calendar		Air Taxi & General Aviation Operations - High Scenario												
	Year	SDIA	CRQ	MYF	SEE	SDM	RNM	OKB	L18	L08	L54	L90	L78	Total
Actual	2000	16,759	236,911	251,464	187,677	108,312	132,407	n.a.	n.a.	6,127	n.a.	n.a.	n.a.	939,658
	2001	18,942	208,725	214,883	175,321	116,208	110,413	n.a.	n.a.	6,127	n.a.	n.a.	n.a.	850,619
	2002	25,789	196,775	245,343	182,921	130,198	106,429	n.a.	20,896	10,291	n.a.	n.a.	n.a.	918,641
	2003	24,497	186,099	216,351	180,292	97,293	95,328	n.a.	18,292	19,554	452	246	1,626	840,030
	2004	24,150	201,115	229,351	207,910	97,374	121,271	11,233	22,728	18,697	500	250	1,500	936,078
	2005	24,595	201,877	245,030	242,165	109,427	139,886	11,609	36,124	26,454	650	405	325	1,038,547
	2006	24,209	191,495	231,453	278,380	127,789	153,498	14,352	32,586	20,853	650	405	325	1,075,995
	2007	23,645	205,042	221,585	294,027	137,745	163,479	14,128	33,286	26,251	700	800	325	1,121,013
Estimate	2008	21,500	194,700	246,700	271,000	115,200	125,500	11,600	22,300	22,400	700	800	325	1,032,725
Forecast	2010	22,700	201,700	250,000	290,600	120,900	137,100	14,400	23,000	22,400	700	800	325	1,084,625
	2015	26,500	214,500	250,700	339,600	194,400	157,800	26,600	34,300	22,400	700	800	325	1,268,625
	2020	30,900	229,100	255,300	388,600	229,900	207,000	31,000	36,700	22,400	700	800	325	1,432,725
	2025	36,100	244,900	262,400	437,600	251,900	222,200	33,400	39,600	22,400	700	800	325	1,552,325
	2030	42,100	264,000	271,500	489,400	275,900	241,100	36,500	43,200	22,400	700	800	325	1,687,925
<u>Average Annual Growth Rate:</u>														
	2000-2007	5.0%	-2.0%	-1.8%	6.6%	3.5%	3.1%	n.a.	n.a.	23.1%	n.a.	n.a.	n.a.	2.6%
	2007-2010	-1.3%	-0.5%	4.1%	-0.4%	-4.3%	-5.7%	0.6%	-11.6%	-5.2%	0.0%	0.0%	0.0%	-1.1%
	2010-2020	3.1%	1.3%	0.2%	2.9%	6.6%	4.2%	8.0%	4.8%	0.0%	0.0%	0.0%	0.0%	2.8%
	2020-2030	3.1%	1.4%	0.6%	2.3%	1.8%	1.5%	1.6%	1.6%	0.0%	0.0%	0.0%	0.0%	1.7%
	2007-2030	2.5%	1.1%	0.9%	2.2%	3.1%	1.7%	4.2%	1.1%	-0.7%	0.0%	0.0%	0.0%	1.8%

Sources: FAA, ATADS; USDOT, Schedule T-100; *Official Airline Guide*; *Unconstrained Gillespie Field Aviation Activity Forecasts Master Plan*, September 2008; San Diego County, Department of Public Works; Landrum & Brown analysis

Legend:

SDIA – San Diego International Airport
CRQ – McClellan-Palomar Airport
MYF – Montgomery Field

SEE – Gillespie Field
SDM – Brown Field Municipal Airport
RNM – Ramona Airport

OKB – Oceanside Municipal Airport
L18 – Fallbrook Community Airpark
L08 – Borrego Valley Airport

L54 – Agua Caliente Airport
L90 – Ocotillo Airport
L78 – Jacumba Airport

Historical Air Taxi & GA Operations Fleet Mix

12 Public-Use Airports in San Diego County

- Single engine aircraft operations accounted for the majority of Air Taxi and GA operations except at SDIA
- Aircraft operations fleet mix for SDIA, Gillespie and Fallbrook were obtained from the Master Plan forecasts

<u>Facility</u>	<u>Code</u>	<u>Operations Aircraft Fleet Mix (Base Year)</u>					<u>Total</u>
		<u>Single- engine</u>	<u>Multi- engine</u>	<u>Turboprop/ Jets</u>	<u>Helicopters</u>	<u>Other</u>	
San Diego International Airport	SAN	16.9%	3.6%	74.6%	2.5%	2.2%	100.0%
McClellan-Palomar Airport	CRQ	68.7%	6.1%	8.1%	17.2%	0.0%	100.0%
Montgomery Field Airport	MYF	77.0%	17.0%	4.0%	2.0%	0.0%	100.0%
Gillespie Field Airport	SEE	81.7%	10.5%	3.5%	3.8%	0.5%	100.0%
Brown Field Municipal Airport	SDM	55.0%	11.6%	15.9%	17.5%	0.0%	100.0%
Ramona Airport	RNM	76.0%	12.0%	2.0%	9.0%	1.0%	100.0%
Oceanside Municipal Airport	OKB	95.0%	3.0%	0.0%	2.0%	0.0%	100.0%
Fallbrook Community Airpark	L18	98.0%	2.0%	0.0%	0.0%	0.0%	100.0%
Borrego Valley Airport	L08	78.0%	15.0%	5.0%	2.0%	0.0%	100.0%
Agua Caliente Airport	L54	100.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Ocotillo Airport	L90	100.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Jacumba Airport	L78	100.0%	0.0%	0.0%	0.0%	0.0%	100.0%

Sources: *Destination Lindbergh, The Ultimate Build-out, Aviation Activity Forecast*, Draft August 2008; San Diego County, Airport Land Use Compatibility Plans (ALUCP); *Constrained Gillespie Field Aviation Activity Forecasts Master Plan*, September 9, 2008; *Fallbrook Community Airpark Master Plan*, March 2006; Landrum & Brown analysis

2030 Air Taxi & GA Operations Fleet Mix

12 Public-Use Airports in San Diego County

- Single-engine and twin-engine activity expected to decline as a share of total traffic, following the trends in based aircraft
- Consistent with national trends and the based aircraft forecast, turboprop/jet activity expected to increase
- Helicopter activity is expected to maintain the same share

		2030 Operations Aircraft Fleet Mix					
<u>Facility</u>	<u>Code</u>	<u>Single-engine</u>	<u>Multi-engine</u>	<u>Turboprop/Jets</u>	<u>Helicopters</u>	<u>Other</u>	<u>Total</u>
San Diego International Airport	SAN	14.0%	1.6%	84.3%	0.2%	0.0%	100.0%
McClellan-Palomar Airport	CRQ	61.1%	4.1%	17.7%	17.1%	0.0%	100.0%
Montgomery Field Airport	MYF	76.5%	11.3%	8.7%	3.4%	0.0%	100.0%
Gillespie Field Airport	SEE	85.8%	7.7%	3.1%	2.9%	0.5%	100.0%
Brown Field Municipal Airport	SDM	45.7%	6.7%	22.3%	25.2%	0.0%	100.0%
Ramona Airport	RNM	76.4%	10.8%	1.8%	10.0%	1.0%	100.0%
Oceanside Municipal Airport	OKB	97.0%	1.0%	0.0%	2.0%	0.0%	100.0%
Fallbrook Community Airpark	L18	98.0%	2.0%	0.0%	0.0%	0.0%	100.0%
Borrego Valley Airport	L08	78.0%	15.0%	5.0%	2.0%	0.0%	100.0%
Agua Caliente Airport	L54	100.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Ocotillo Airport	L90	100.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Jacumba Airport	L78	100.0%	0.0%	0.0%	0.0%	0.0%	100.0%

Sources: *Destination Lindbergh, The Ultimate Build-out, Aviation Activity Forecast*, Draft August 2008; San Diego County, *Airport Land Use Compatibility Plans (ALUCP)*; *Constrained Gillespie Field Aviation Activity Forecasts Master Plan*, September 9, 2008; *Fallbrook Community Airpark Master Plan*, March 2006; Landrum & Brown analysis

Military Forecasts

12 Public-Use Airports in San Diego County

- Assumes military operations remain flat for forecast period

		Military Operations							
	<u>Calendar</u>	<u>SDIA</u>	<u>McClellan-</u> <u>Palomar</u>	<u>Montgomery</u> <u>Field</u>	<u>Gillespie</u> <u>Field</u>	<u>Brown</u> <u>Field</u>	<u>Ramona</u>	<u>Agua</u> <u>Caliente</u>	<u>Total</u>
<u>Actual</u>	2000	770	7,962	181	74	4,488	n.a.	n.a.	13,475
	2001	1,504	4,767	306	71	7,553	n.a.	n.a.	14,201
	2002	1,253	1,966	300	224	10,624	n.a.	n.a.	14,367
	2003	543	1,923	220	457	8,034	n.a.	n.a.	11,177
	2004	230	1,537	322	249	7,013	604	n.a.	9,955
	2005	227	1,585	204	14	7,471	1,014	n.a.	10,515
	2006	193	1,571	1,245	8	7,696	1,622	n.a.	12,335
	2007	216	1,663	907	1,625	7,916	1,220	3,700	17,247
<u>Estimate</u>	2008	216	1,562	300	200	5,600	2,900	3,700	14,478
<u>Forecast</u>	2010	200	1,600	300	200	5,600	1,000	3,700	12,600
	2015	200	1,600	300	200	5,600	1,000	3,700	12,600
	2020	200	1,600	300	200	5,600	1,000	3,700	12,600
	2025	200	1,600	300	200	5,600	1,000	3,700	12,600
	2030	200	1,600	300	200	5,600	1,000	3,700	12,600
<u>Average Annual Growth Rate:</u>									
	2000-2007	-16.6%	-20.0%	25.9%	55.5%	8.4%	n.a.	n.a.	3.6%
	2007-2010	-2.5%	-1.3%	-30.8%	-50.3%	-10.9%	-6.4%	0.0%	-9.9%
	2010-2020	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	2020-2030	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
	2007-2030	-0.3%	-0.2%	-4.7%	-8.7%	-1.5%	-0.9%	0.0%	-1.4%

Notes: No military operations reported at Oceanside, Fallbrook, Borrego Valley, Ocotillo, and Jacumba. 2008 is annualized from January-July 2008 data.

Sources: FAA, ATADS; San Diego County, Department of Public Works; Landrum & Brown analysis

Total Operations Forecast (Baseline)

12 Public-Use Airports in San Diego County

		Total Operations - Baseline												
	<u>Calendar</u>													
	<u>Year</u>	<u>SDIA</u>	<u>CRQ</u>	<u>MYF</u>	<u>SEE</u>	<u>SDM</u>	<u>RNM</u>	<u>OKB</u>	<u>L18</u>	<u>L08</u>	<u>L54</u>	<u>L90</u>	<u>L78</u>	<u>Total</u>
<u>Actual</u>	2000	206,889	255,096	251,645	187,751	112,800	132,407	n.a.	n.a.	6,127	n.a.	n.a.	n.a.	1,152,715
	2001	206,988	221,898	215,189	175,392	123,761	110,413	n.a.	n.a.	6,127	n.a.	n.a.	n.a.	1,059,768
	2002	206,380	204,289	245,643	183,145	140,822	106,429	n.a.	20,896	10,291	n.a.	n.a.	n.a.	1,117,895
	2003	202,577	193,336	216,571	180,749	105,327	95,328	n.a.	18,292	19,554	452	246	1,626	1,034,058
	2004	208,311	207,866	229,673	208,159	104,387	121,875	11,233	22,728	18,697	500	250	1,500	1,135,179
	2005	219,866	208,768	245,234	242,179	116,898	140,900	11,609	36,124	26,454	650	405	325	1,249,412
	2006	220,620	198,590	232,698	278,388	135,485	155,120	14,352	32,586	20,853	650	405	325	1,290,072
<u>Estimate</u> <u>Forecast</u>	2007	229,486	212,023	222,492	295,652	145,661	164,699	14,128	33,286	26,251	4,400	800	325	1,349,203
	2008	228,100	201,000	247,000	262,100	120,800	128,400	11,600	22,302	22,400	4,400	800	325	1,249,227
	2010	219,800	208,900	250,300	266,200	126,500	138,100	12,000	23,000	22,400	4,400	800	325	1,272,725
	2015	231,800	219,200	251,000	278,100	135,800	158,800	14,500	34,300	22,400	4,400	800	325	1,351,425
	2020	254,600	233,800	255,600	315,000	147,700	167,400	15,500	36,700	22,400	4,400	800	325	1,454,225
	2025	280,300	249,600	262,700	376,300	161,300	178,800	16,600	39,600	22,400	4,400	800	325	1,593,125
	2030	309,800	268,700	271,800	461,000	175,900	193,000	18,200	43,200	22,400	4,400	800	325	1,769,525
<u>Average Annual Growth Rate:</u>														
2000-2007		1.5%	-2.6%	-1.7%	6.7%	3.7%	3.2%	n.a.	n.a.	23.1%	n.a.	n.a.	n.a.	2.3%
2007-2010		-1.4%	-0.5%	4.0%	-3.4%	-4.6%	-5.7%	-5.3%	-11.6%	-5.2%	0.0%	0.0%	0.0%	-1.9%
2010-2020		1.5%	1.1%	0.2%	1.7%	1.6%	1.9%	2.6%	4.8%	0.0%	0.0%	0.0%	0.0%	1.3%
2020-2030		2.0%	1.4%	0.6%	3.9%	1.8%	1.4%	1.6%	1.6%	0.0%	0.0%	0.0%	0.0%	2.0%
2007-2030		1.3%	1.0%	0.9%	2.0%	0.8%	0.7%	1.1%	1.1%	-0.7%	0.0%	0.0%	0.0%	1.2%

Sources: FAA, ATADS; County of San Diego, Department of Public Works; *Destination Lindbergh, The Ultimate Build-out, Aviation Activity Forecast*, Draft August 2008; *Unconstrained Gillespie Field Aviation Activity Forecasts Master Plan*, September 2008; Airport Staff; Landrum & Brown analysis.

Legend:

SDIA – San Diego International Airport
CRQ – McClellan-Palomar Airport
MYF – Montgomery Field

SEE – Gillespie Field
SDM – Brown Field Municipal Airport
RNM – Ramona Airport

OKB – Oceanside Municipal Airport
L18 – Fallbrook Community Airpark
L08 – Borrego Valley Airport

L54 – Agua Caliente Airport
L90 – Ocotillo Airport
L78 – Jacumba Airport

Total Operations Forecast (High Scenario)

12 Public-Use Airports in San Diego County

Calendar		Total Operations - High Scenario												
	Year	SDIA	CRQ	MYF	SEE	SDM	RNM	OKB	L18	L08	L54	L90	L78	Total
<u>Actual</u>	2000	206,889	255,096	251,645	187,751	112,800	132,407	n.a.	n.a.	6,127	n.a.	n.a.	n.a.	1,152,715
	2001	206,988	221,898	215,189	175,392	123,761	110,413	n.a.	n.a.	6,127	n.a.	n.a.	n.a.	1,059,768
	2002	206,380	204,289	245,643	183,145	140,822	106,429	n.a.	20,896	10,291	n.a.	n.a.	n.a.	1,117,895
	2003	202,577	193,336	216,571	180,749	105,327	95,328	n.a.	18,292	19,554	452	246	1,626	1,034,058
	2004	208,311	207,866	229,673	208,159	104,387	121,875	11,233	22,728	18,697	500	250	1,500	1,135,179
	2005	219,866	208,768	245,234	242,179	116,898	140,900	11,609	36,124	26,454	650	405	325	1,249,412
	2006	220,620	198,590	232,698	278,388	135,485	155,120	14,352	32,586	20,853	650	405	325	1,290,072
	2007	229,486	212,023	222,492	295,652	145,661	164,699	14,128	33,286	26,251	4,400	800	325	1,349,203
<u>Estimate</u>	2008	228,100	201,000	247,000	271,200	120,800	128,400	11,600	22,302	22,400	4,400	800	325	1,258,327
<u>Forecast</u>	2010	241,100	208,900	250,300	290,800	126,500	138,100	14,400	23,000	22,400	4,400	800	325	1,321,025
	2015	261,200	226,000	251,000	339,800	200,000	158,800	26,600	34,300	22,400	4,400	800	325	1,525,625
	2020	290,600	245,000	255,600	388,800	235,500	208,000	31,000	36,700	22,400	4,400	800	325	1,719,125
	2025	325,000	260,800	262,700	437,800	257,500	223,200	33,400	39,600	22,400	4,400	800	325	1,867,925
	2030	363,400	279,900	271,800	489,600	281,500	242,100	36,500	43,200	22,400	4,400	800	325	2,035,925
<u>Average Annual Growth Rate:</u>														
	2000-2007	1.5%	-2.6%	-1.7%	6.7%	3.7%	3.2%	n.a.	n.a.	23.1%	n.a.	n.a.	n.a.	2.3%
	2007-2010	1.7%	-0.5%	4.0%	-0.6%	-4.6%	-5.7%	0.6%	-11.6%	-5.2%	0.0%	0.0%	0.0%	-0.7%
	2010-2020	1.9%	1.6%	0.2%	2.9%	6.4%	4.2%	8.0%	4.8%	0.0%	0.0%	0.0%	0.0%	2.7%
	2020-2030	2.3%	1.3%	0.6%	2.3%	1.8%	1.5%	1.6%	1.6%	0.0%	0.0%	0.0%	0.0%	1.7%
	2007-2030	2.0%	1.2%	0.9%	2.2%	2.9%	1.7%	4.2%	1.1%	-0.7%	0.0%	0.0%	0.0%	1.8%

Sources: FAA, ATADS; County of San Diego, Department of Public Works; *Destination Lindbergh, The Ultimate Build-out, Aviation Activity Forecast*, Draft August 2008; *Unconstrained Gillespie Field Aviation Activity Forecasts Master Plan*, September 2008; Airport Staff; Landrum & Brown analysis.

Legend:

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Forecast Comparison to FAA TAF

12 Public-Use Airports in San Diego County

					Aircraft Operations				
Enplaned Passengers									
	L&B (Baseline)	L&B (High Scenario)	TAF	% Diff. (Baseline)					
SDIA					Gillespie Field Airport				
2007	9,172,966	9,083,777	9,083,777	1.0%	2007	295,652	295,652	295,652	0.0%
2012	9,565,900	10,754,187	10,754,187	-12.4%	2012	270,700	310,400	263,355	2.7%
2017	10,624,800	12,393,577	12,393,577	-16.6%	2017	288,900	359,400	268,621	7.0%
McClellan-Palomar Airport					Brown Field Airport				
2007	46,909	46,909	52,612	-12.2%	2007	145,661	142,858	142,858	1.9%
2012	50,000	50,000	62,638	-25.3%	2012	130,100	157,057	157,057	-20.7%
2017	50,000	225,400	74,576	-49.2%	2017	140,300	170,443	170,443	-21.5%
Aircraft Operations									
	L&B (Baseline)	L&B (High Scenario)	TAF	% Diff. (Baseline)					
SDIA					Ramona Airport				
2007	229,486	232,613	232,613	-1.4%	2007	164,699	164,699	163,078	1.0%
2012	224,400	271,122	271,122	-20.8%	2012	156,000	156,000	186,135	-19.3%
2017	241,200	305,109	305,109	-26.5%	2017	161,500	182,800	205,188	-27.1%
McClellan-Palomar Airport					Oceanside Airport				
2007	212,023	212,023	211,329	0.3%	2007	14,128	14,128	18,000	-27.4%
2012	213,900	213,900	226,277	-5.8%	2012	14,100	20,000	18,000	-27.7%
2017	224,600	231,400	237,178	-5.6%	2017	14,800	29,700	18,000	-21.6%
Montgomery Field Airport					Fallbrook Community Airpark				
2007	222,492	226,232	226,232	-1.7%	2007	33,286	33,286	36,125	-8.5%
2012	250,400	240,555	240,555	3.9%	2012	33,300	33,300	33,300	0.0%
2017	252,300	258,126	258,126	-2.3%	2017	35,200	35,200	35,171	0.1%
					Borrego Valley Airport				
					2007	26,251	26,251	22,000	16.2%
					2012	22,400	22,400	22,000	1.8%
					2017	22,400	22,400	22,000	1.8%

Note: No TAF for Agua Caliente, Ocotillo, and Jacumba

Sources: FAA, TAF; Landrum & Brown analysis

Forecast Comparison to ALUCP

12 Public-Use Airports in San Diego County

- ALUCP reports provide ultimate operations and enplanements levels for 20+ years
- The L&B operations forecast for Gillespie Field and Agua Caliente are higher than the ALUCP levels. For all other county airports the ALUCP levels are higher

	L&B (Baseline)	L&B (High Scenario)	ALUCP
Airport	2030	2030	20+ Years
SDIA Enplanements	14.1 million	15.5 Million	14.1 million
SDIA Operations	309,800	363,400	298,700
McClellan-Palomar Enplanements	50,000	426,200	n.a.
McClellan-Palomar Operations	268,700	279,900	289,100
Montgomery Field Operations	271,800	271,800	370,000
Gillespie Field Operations	461,000	489,600	294,250
Brown Field Operations	175,900	281,500	240,000
Ramona Operations	193,000	242,100	197,000
Oceanside Operations	18,200	36,500	42,000
Fallbrook Operations	43,200	43,200	51,700
Borrego Valley Operations	22,400	22,400	40,000
Agua Caliente Operations	4,400	4,400	3,500
Ocotillo Operations	800	800	2,900
Jacumba Operations	325	325	4,100

Sources: ALUCPs for each airport; Landrum & Brown analysis