

AUTHORITY ADVISORY COMMITTEE BRIEFING

San Diego International Airport

Prepared for

**San Diego County Regional Airport Authority
San Diego, CA**

October 24, 2012



**SAN DIEGO
INTERNATIONAL
AIRPORT**

SDIA AIRPORT DEVELOPMENT PLAN

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Agenda

- Previous Meeting Recap
- Passenger Intercept Survey Results
- Aviation Activity Forecasts
- Goals and Objectives
- Next Steps



SECTION 1
Previous Meeting Recap



Previous Meeting Recap

■ Last meeting's agenda included:

- Destination Lindbergh Workshop Findings
- Opportunities and Constraints

Used to establish framework to guide the evaluation of future development alternatives

- Goals and Objectives

Revised based on input from the Committees and SDCRAA Board

- Air Service Trends and Development

Used as input in the development of aviation traffic forecasts





SECTION 2

Passenger Intercept Survey Results



Survey Purpose and Goals

- Gain an understanding of SDIA passenger characteristics
- Collect trip origins and determine catchment area
- Determine what influences air travel choices
- Understand why passengers travel to the region
- Gather ground access and parking data to understand modal choices and preferences involved in accessing SDIA
- Compare with 2009 survey results and identify trends

Survey Methodology

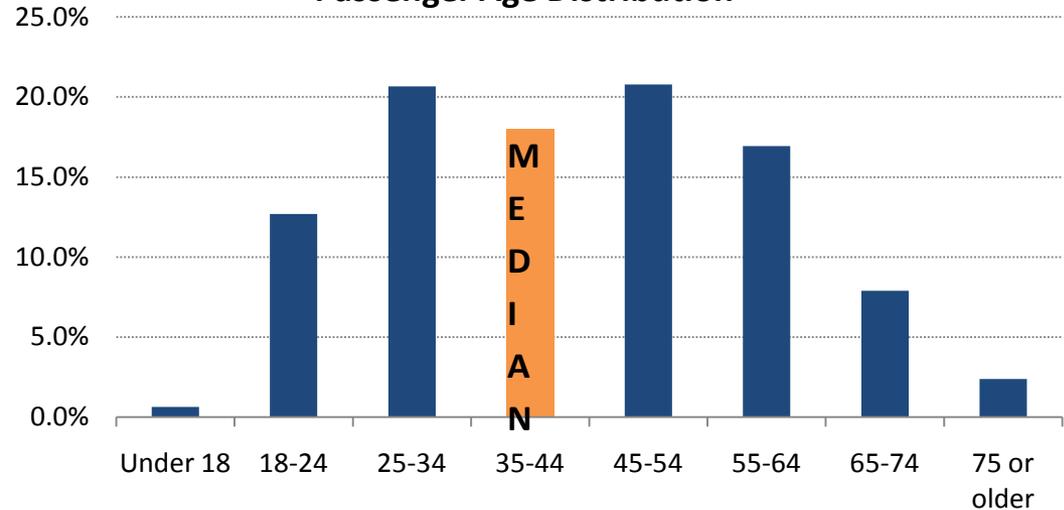
- Survey conducted at SDIA in the passenger holdrooms from May 15th to June 24th, 2012
- 7,929 respondents:
 - 3,369 residents
 - 4,560 visitors
- Departing passengers were interviewed
 - Originating out of SDIA or connecting



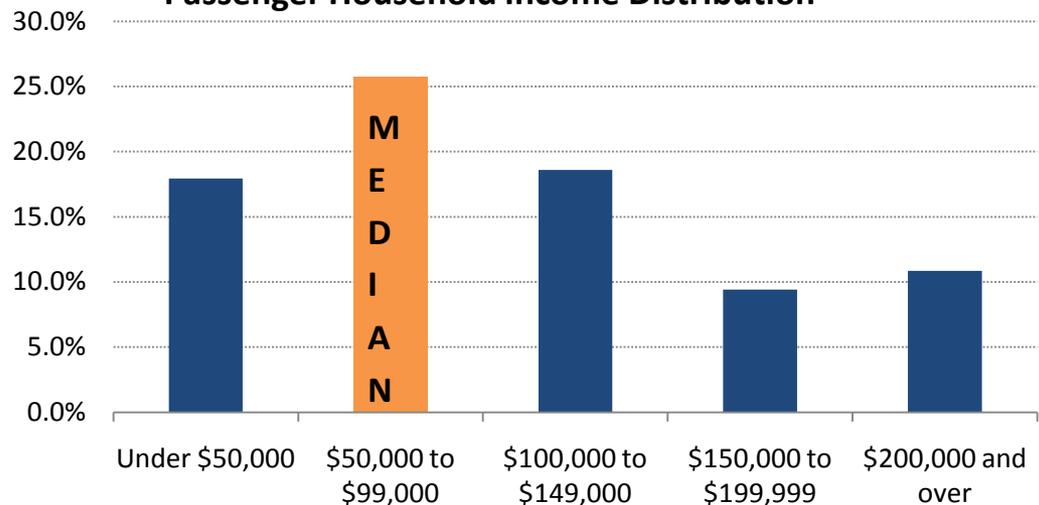
Passenger Demographics

- Balanced distribution of male and female respondents
- Median age category: 35-44 years
- Median household income category: \$50,000 - \$99,000
- Demographics very similar to 2009 survey

Passenger Age Distribution



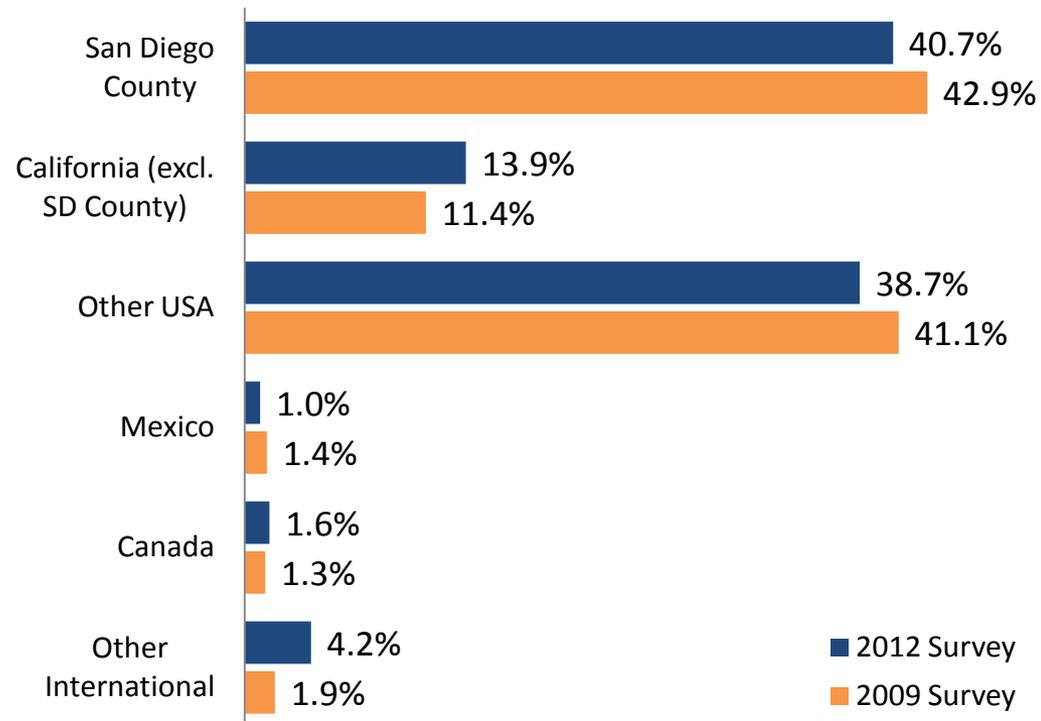
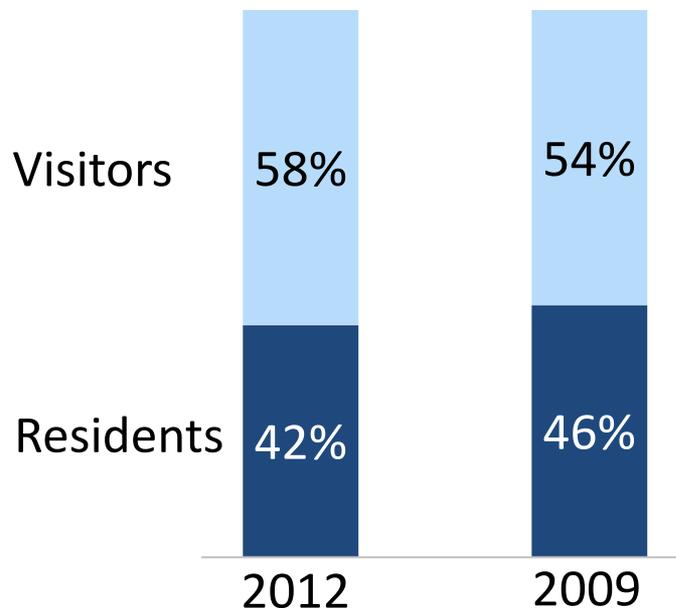
Passenger Household Income Distribution*



*Numbers do not add up to 100% as 17% of respondents declined to answer.

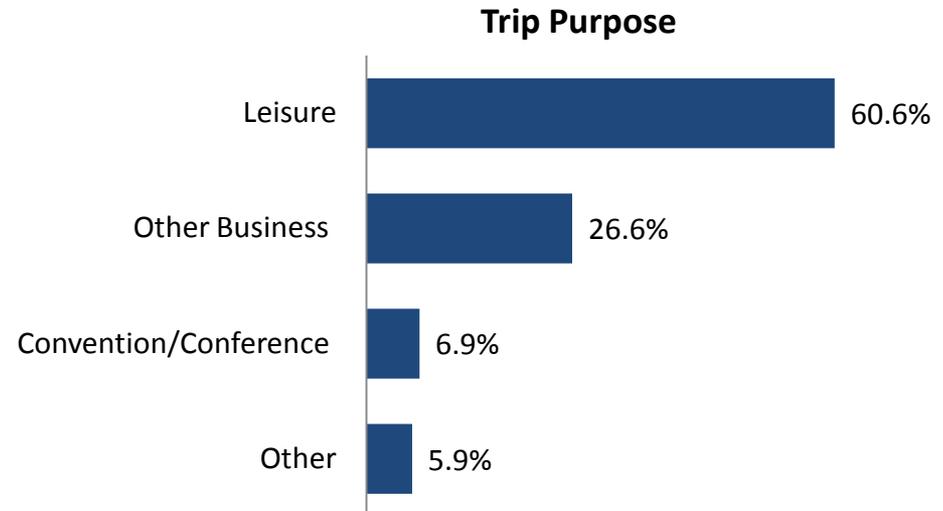
Primary Residence of Passengers

- 41% of SDIA passengers reside in San Diego County
- Visitors, mostly US residents, account for 58% of SDIA passenger, an increase of 4% over 2009 numbers



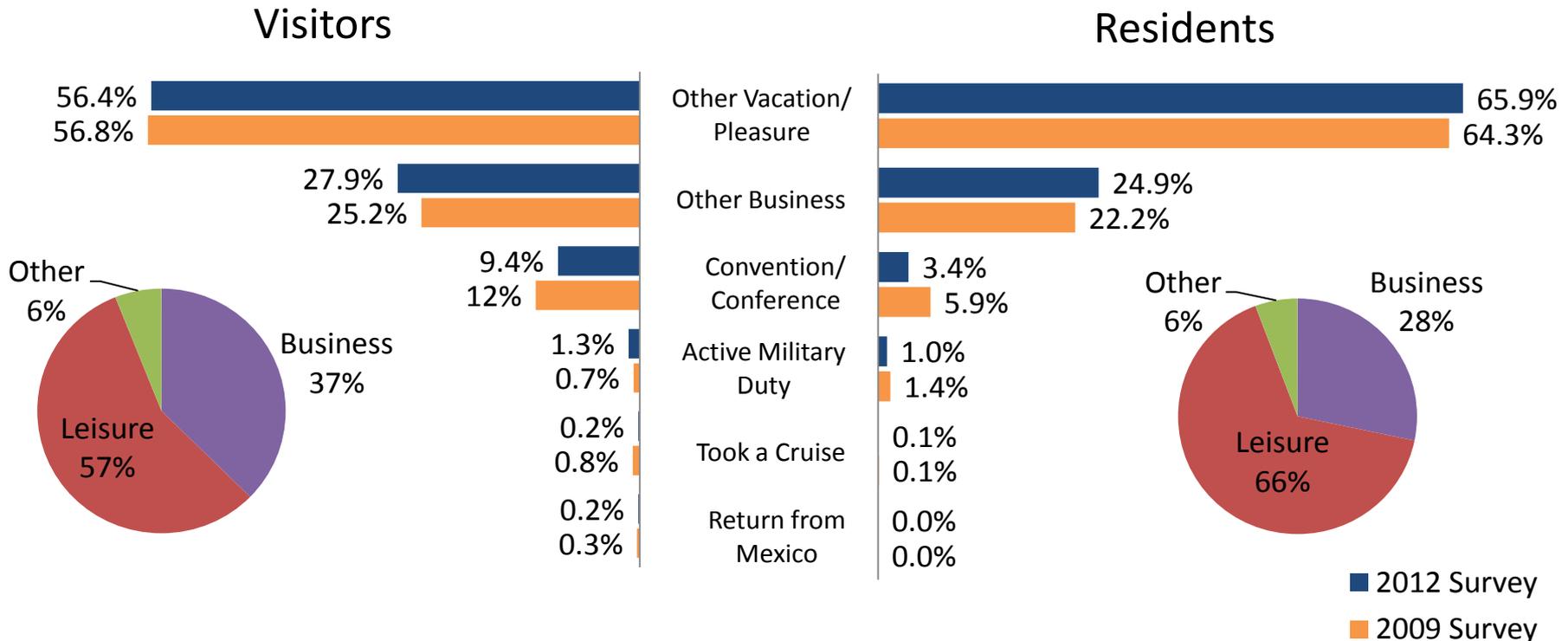
Reason for Traveling

- There are many reasons passengers visit San Diego
- Leisure travelers represent 61% of traffic, while business travelers make up 34% of traffic
- Military personnel, cruise passengers, and students continue to have small market segments



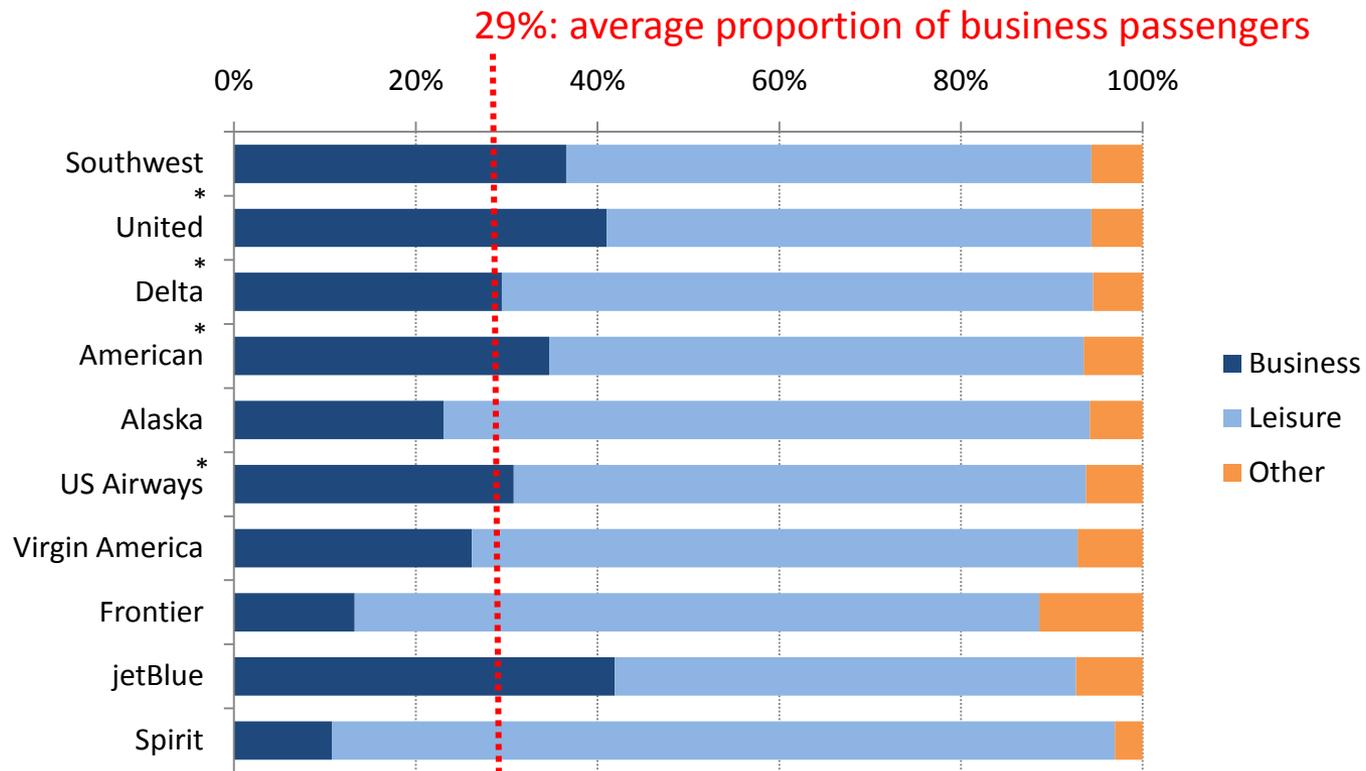
Trip Purpose

- 57% of visitors travel for leisure and 37% travel for business
- Two thirds of residents are traveling for leisure and 28% travel for business



Trip purpose by Airline

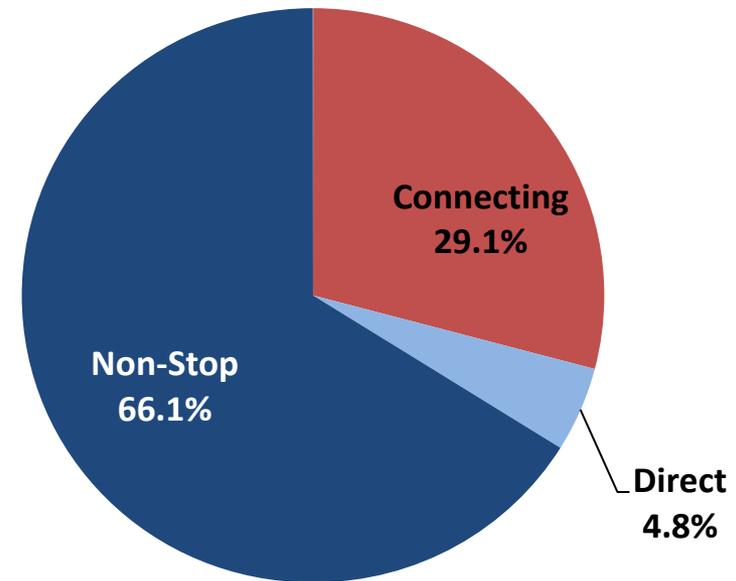
- Legacy carriers continue to attract more business travelers than low-cost carriers although jetBlue and Southwest show high proportions of business passengers



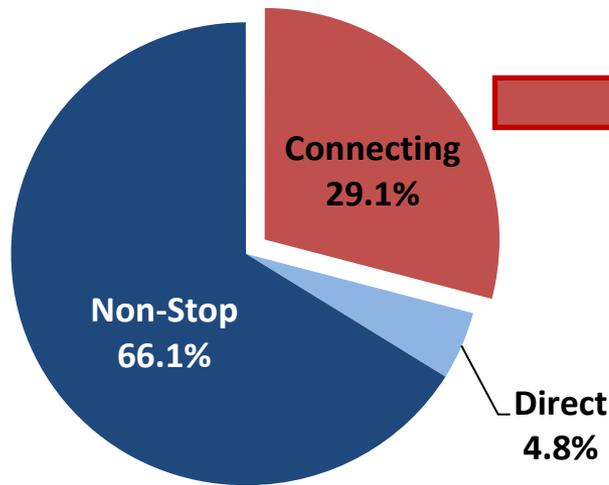
* = includes regional partner airlines

Non-Stop Versus Connecting Flights

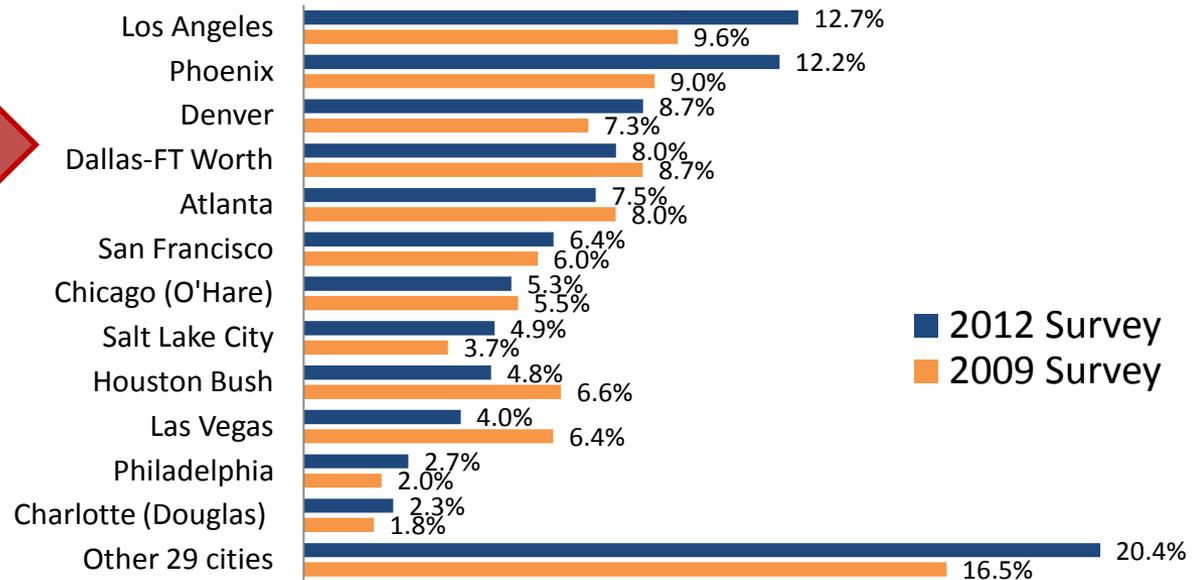
- Two-thirds of passengers reached their final destination on non-stop flights
- Los Angeles, Phoenix, and Denver are the three largest gateways for connecting passengers
- Houston Bush and Las Vegas are becoming less significant connecting hubs for SDIA passengers



Passenger Itinerary



Hub Choices for Connecting Passengers



Passenger Trip Characteristics

- Two thirds of passengers and almost 80% of business passengers are solo travelers
- Business travelers are less likely to check a bag than leisure travelers but bring more carry-on items on board
- Despite baggage fees the percentage of passengers checking bags has only slightly decreased compared to 2009, likely reflecting Southwest’s “free bags” policy

	2009	2012	2012 Detailed Results			
	Overall	Overall	Residents	Visitors	Business	Leisure
% of solo travelers	n.a.	62%	67%	57%	77%	54%
Avg. travel party size	1.7	1.7	1.5	1.8	1.5	1.8
% of parties with checked bags	65%	63%	60%	65%	54%	67%
Avg. number of checked bags per passenger	1.0	1.1	1.1	1.1	1.1	1.0
% of parties with carry-on bags	92%	93%	92%	93%	94%	92%
Avg. number of carry-ons per passenger	1.1	1.2	1.2	1.2	1.3	1.1

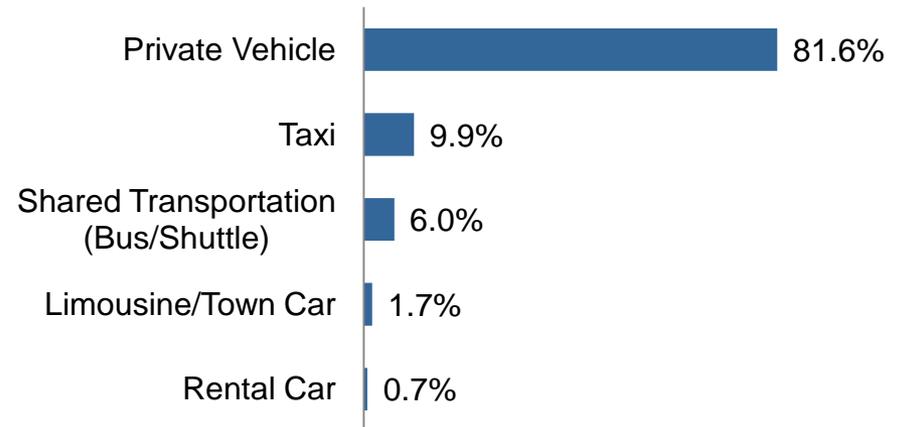
Passengers with no checked or carry-on bags are excluded from per passenger bag metrics



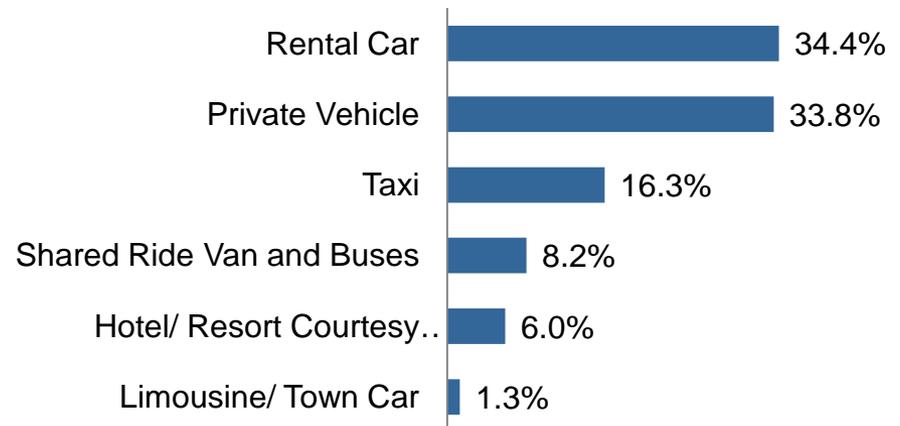
Getting to SDIA

- More than 60% of passengers began their trip from within 30 min of the Airport
- Passengers access the Airport primarily by private or rental car
- 1.0% of passengers surveyed arrived at SDIA by public bus

Airport Access Mode - Residents



Airport Access Mode - Visitors



Passenger Trends at the Airport

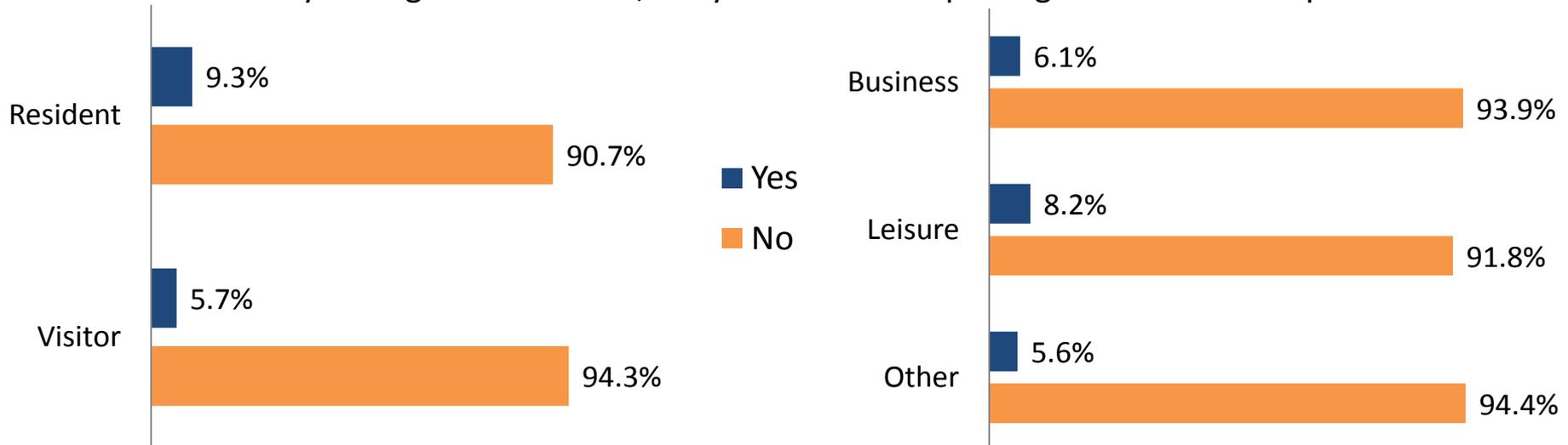
- Passengers arrive 2 hours early
- Despite baggage fees the percentage of passengers checking bags has only slightly decreased in recent years
- Passengers spent an average of \$4.60 on food and beverage items and \$1.30 on magazines, gifts, and other services

% of solo travelers	62%
Avg. travel party size	1.7
% of parties with checked bags	63%
Avg. number of checked bags per passenger	1.1
% of parties with carry-on bags	93%
Avg. number of carry-ons per passenger	1.2

Alternative Airports Considered

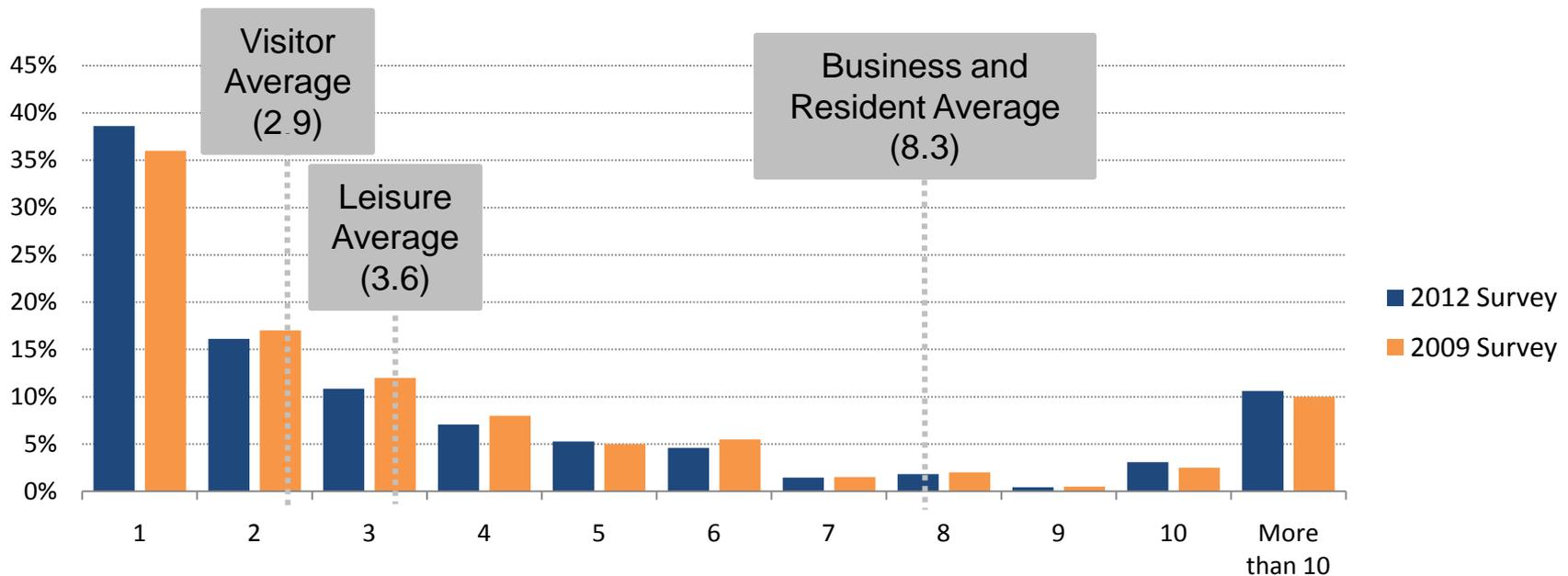
- More than 90% of the passengers did not consider alternative airports before booking their flight
- Residents considered alternative options more than visitors
- Alternative airports considered included Los Angeles International (LAX), John Wayne (SNA), and Carlsbad (CLD)

Before your flight was booked, did you consider departing from another airport?



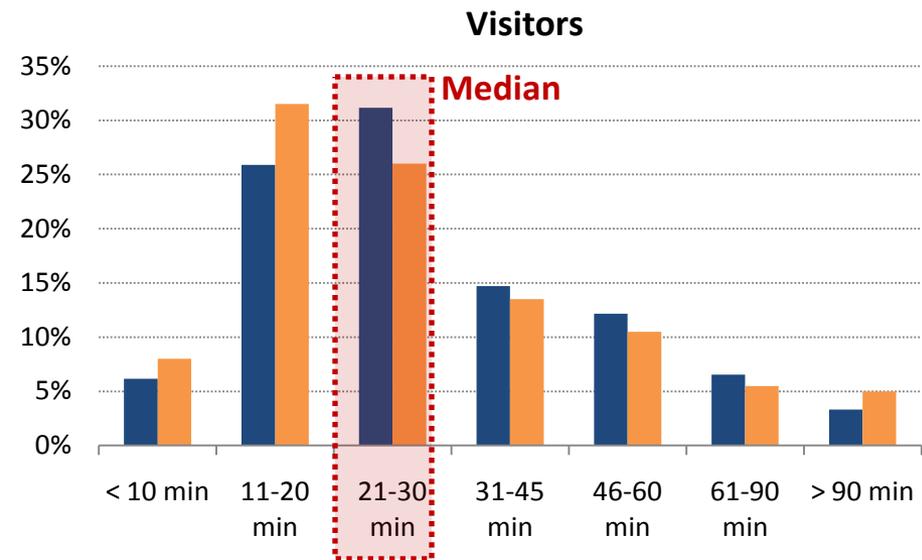
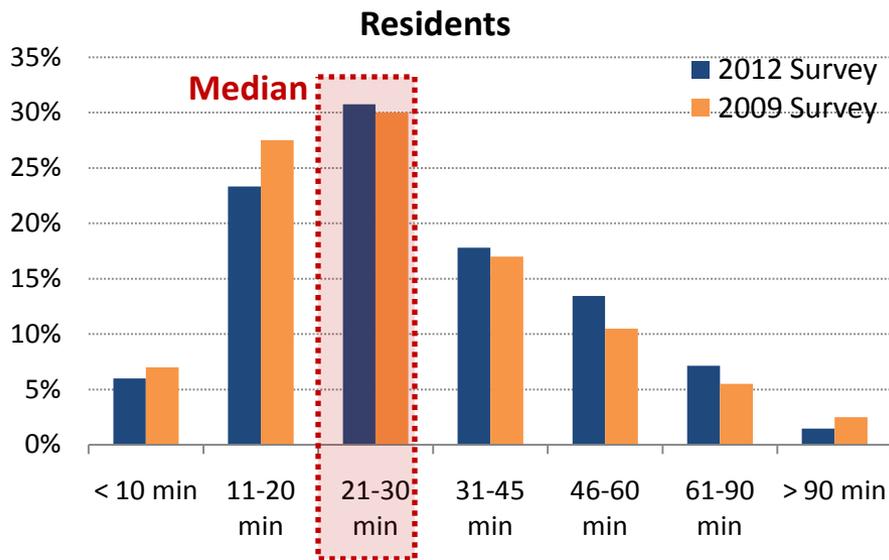
Propensity to Travel out of SDIA

- On average, passengers flew out of SDIA 5.3 times in the last 12 months
- San Diego residents and business travelers averaged more than 8 trips per year
- Visitors travel out of SDIA less than 3 times per year on average



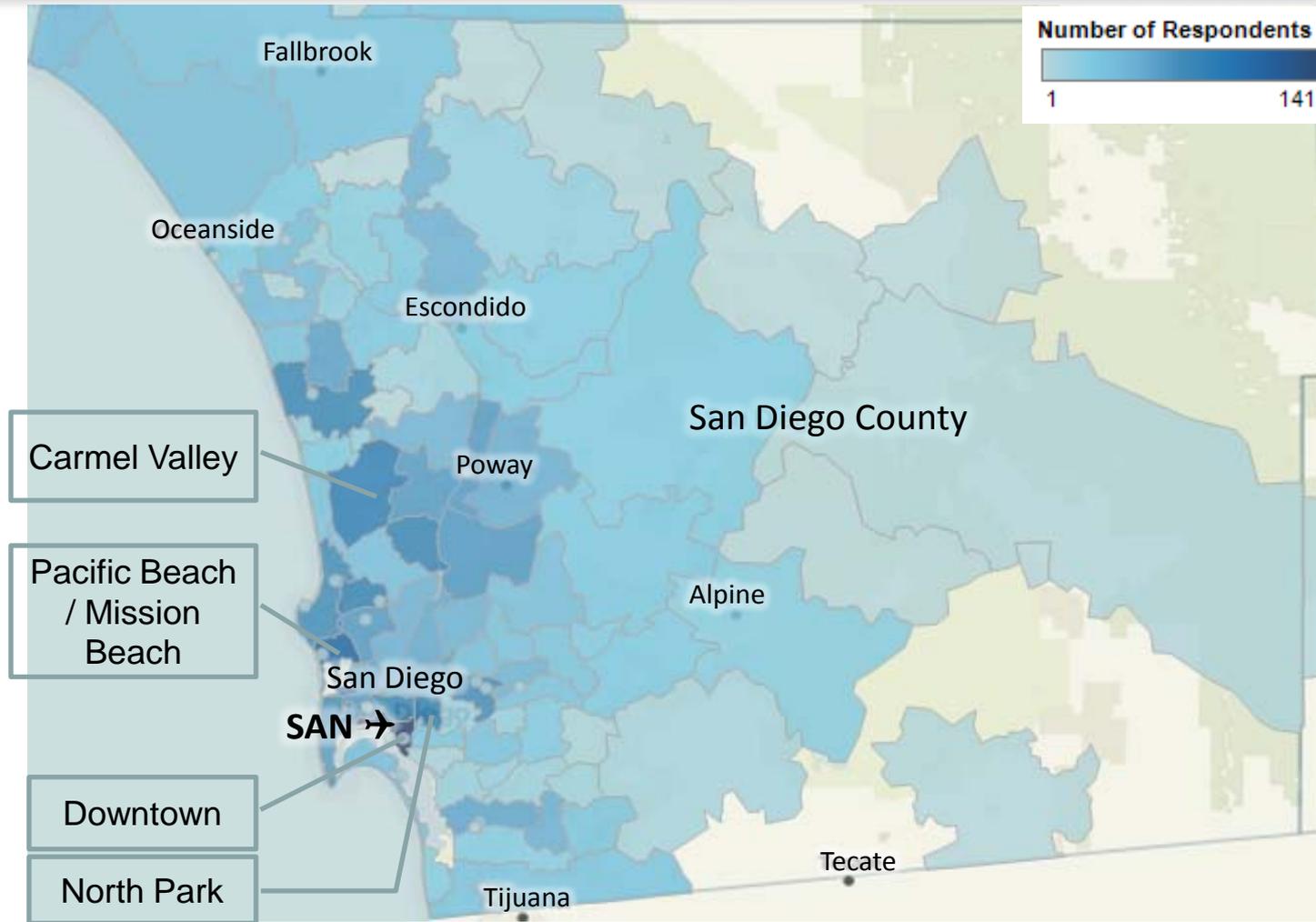
Travel time to SDIA

- More than 60% of O&D passengers began their trip within 30 min from the Airport
- The median travel time category for both residents and visitors is 21 to 30 min
- The data suggests an increase in average travel time to the Airport compared to 2009



Local Passenger Trip Origin-Residents

- Resident trip origins are widely dispersed
- Four zip codes each had more than 2% of residents surveyed



Number of Respondents by Zip Code

Trip Origin Location

- A large majority of visitors started their trip from a hotel or a residence
- Almost 90% of the residents initiated their trip to SDIA from home
- Half as many visitors initiate their trips from a tourist attraction compared to 2009

