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Item B

SAN DIEGO
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2012 SAN Annual Passenger Satisfaction Survey Results: Board of Directors Presentation

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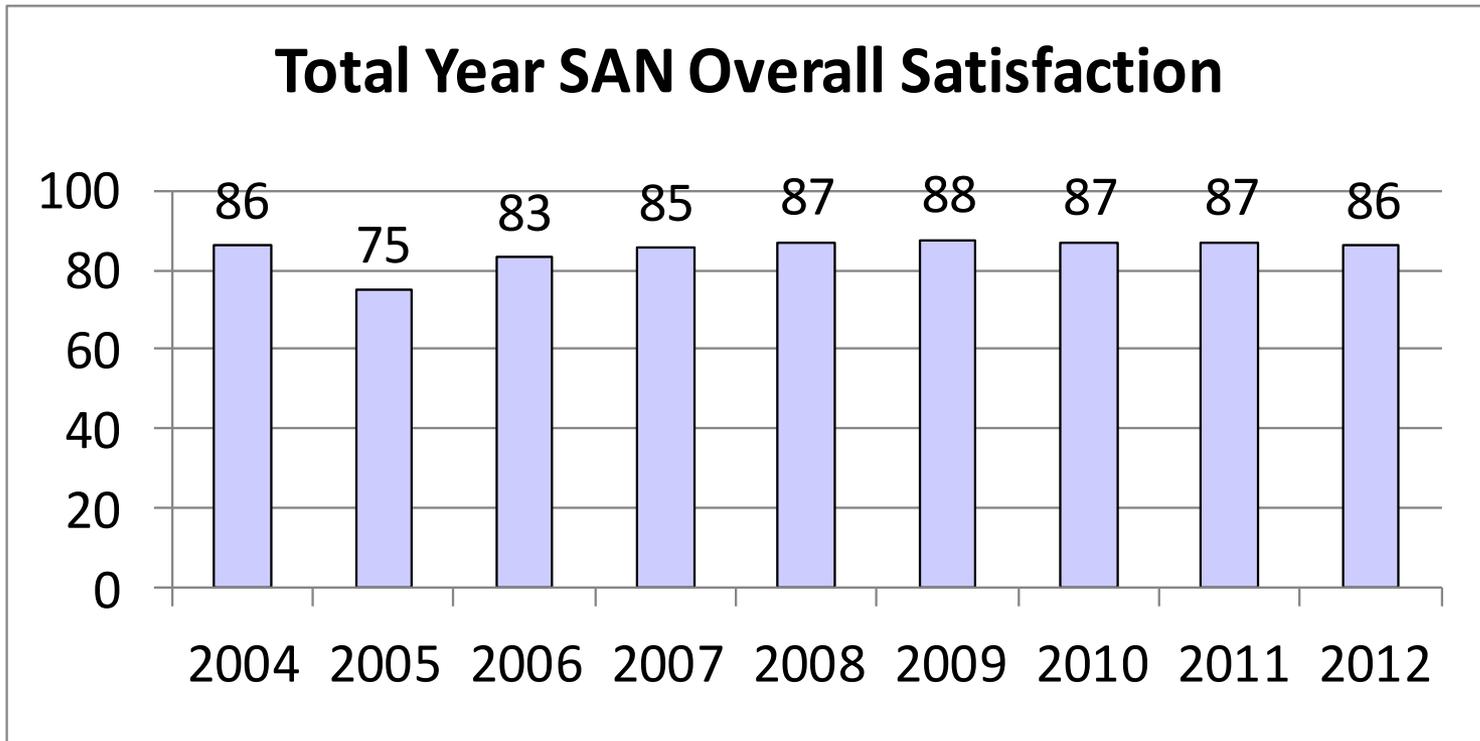
Travel, Leisure and
Entertainment Practice

Methodology

- ➔ A total of 800 SAN passengers were interviewed in 2012 providing a 95% confidence level with an error margin of + 3.5%. Two hundred interviews were conducted every quarter.
- ➔ Each interview was conducted “face-to-face” with a specific interviewer conducting every survey
- ➔ Only departing passengers were surveyed
- ➔ All days of the week were covered as well as all the active dayparts of SAN
- ➔ A five-point scale was used where **1 is Very Dissatisfied and 5 is Very Satisfied**
- ➔ Data was analyzed to indicate what impact broad areas have, (e.g., “Getting to the Terminal”) as well as how “details” (e.g., “Traffic on Airport Roadways”) impacted these broad areas.

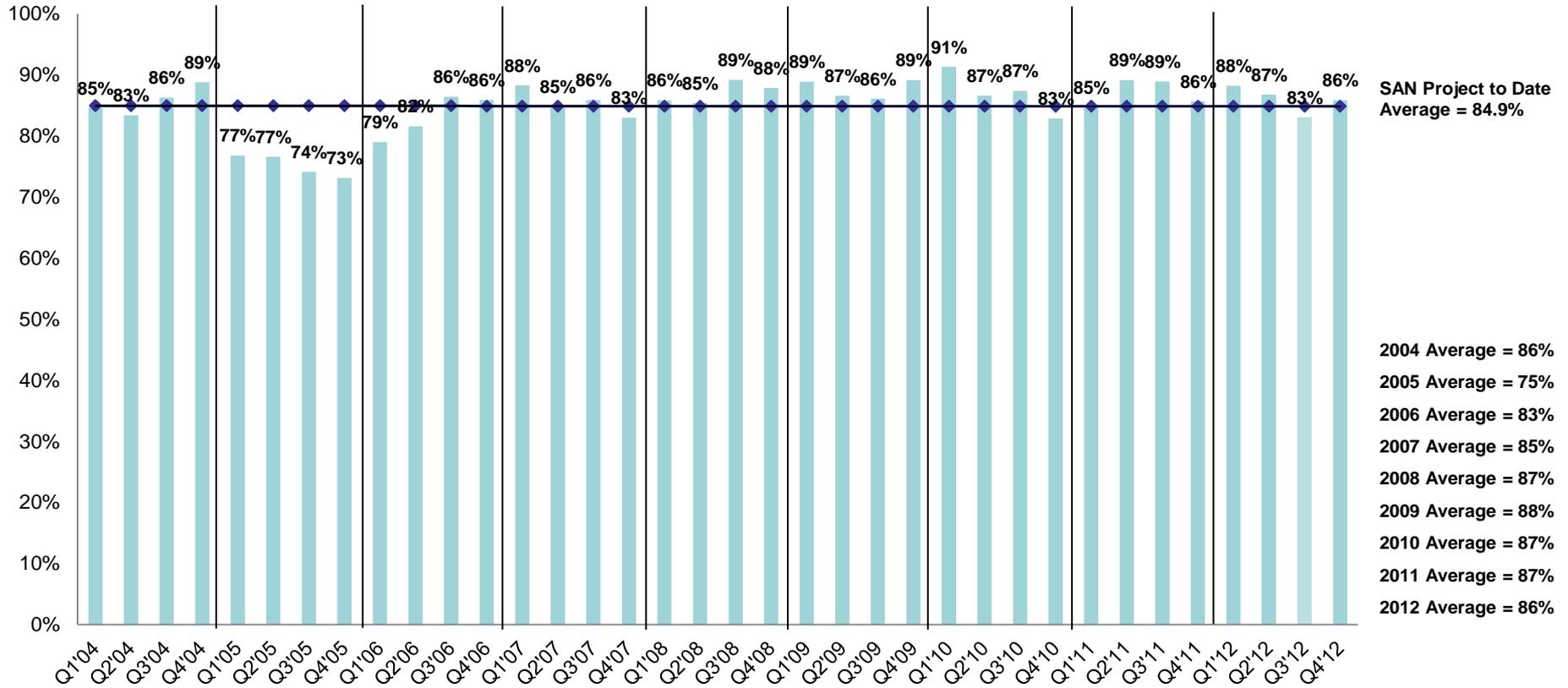
Executive Summary

- ➔ Overall, 86% of respondents in 2012 rate Overall Satisfaction highly at SAN.

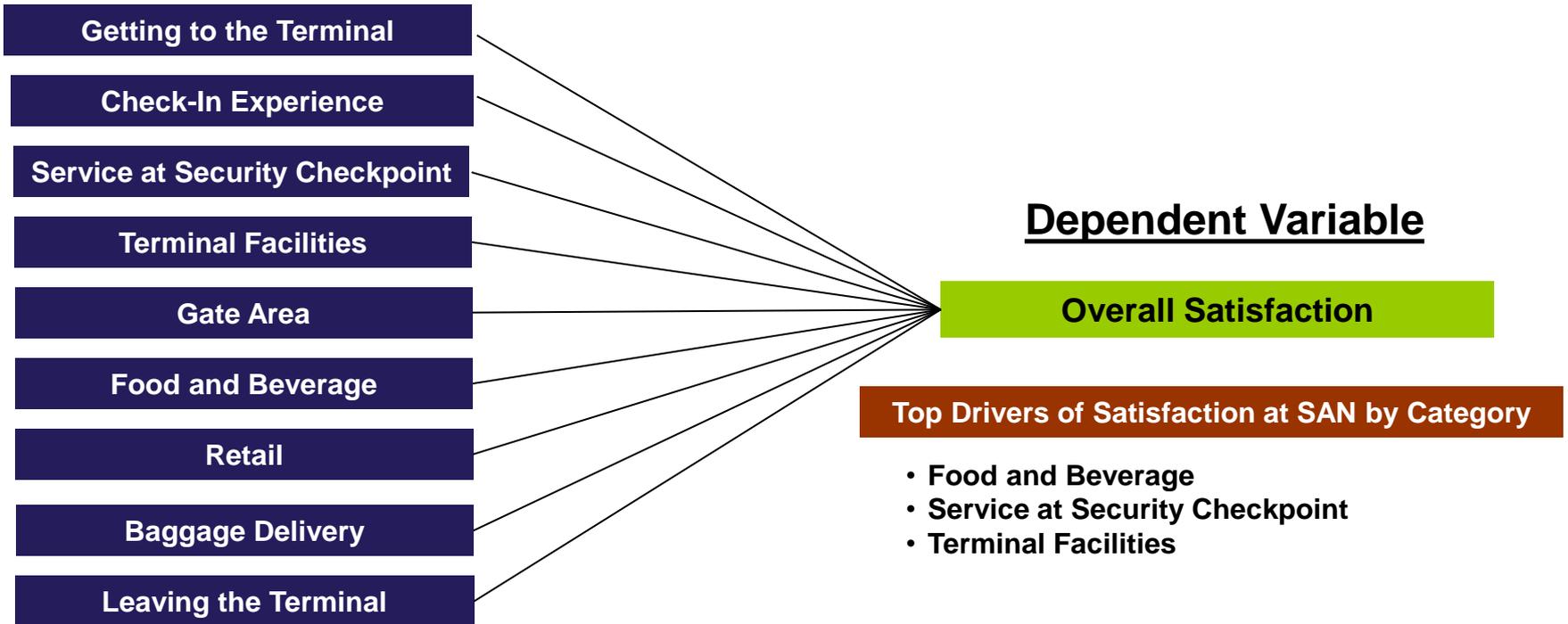


Executive Summary

➔ Overall Satisfaction at SAN Nine Year Average is 84.9%.



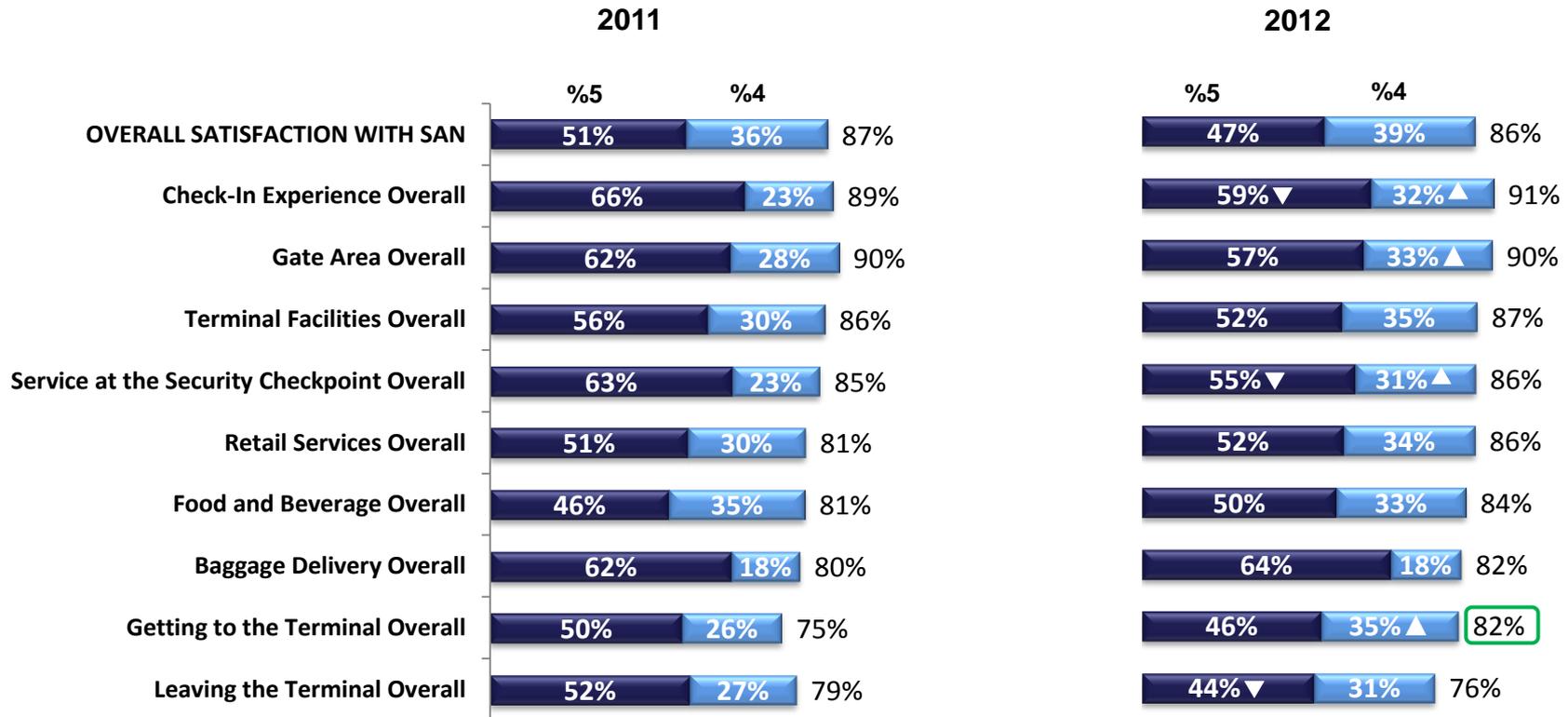
Independent Variables



Please note: Statistical differences are shown throughout this report by boxes and arrows. Boxed numbers represent significant statistical differences from 2011 data at a 95% confidence interval. Green boxes indicate % is significantly higher and red boxes indicate % is significantly lower. Up arrows (▲) indicate that the most recent year 2012 score of 4 or 5 is significantly higher than 2011. Down arrows (▼) indicate that the most recent year 2012 score of 4 or 5 is significantly lower than 2011.

Overall “Getting to the Terminal” is Significantly Higher but Top Box Satisfaction (those that are “Very Satisfied”) Goes Down Significantly in Three Areas

SAN Overall Top Two Box Percentages – 2012 Vs. 2011



Please note: Percent may not add due to rounding. Significant differences @ the 95% confidence level are indicated by boxes and arrows.

Overall Satisfaction in Terminal 1 Scores Lowest

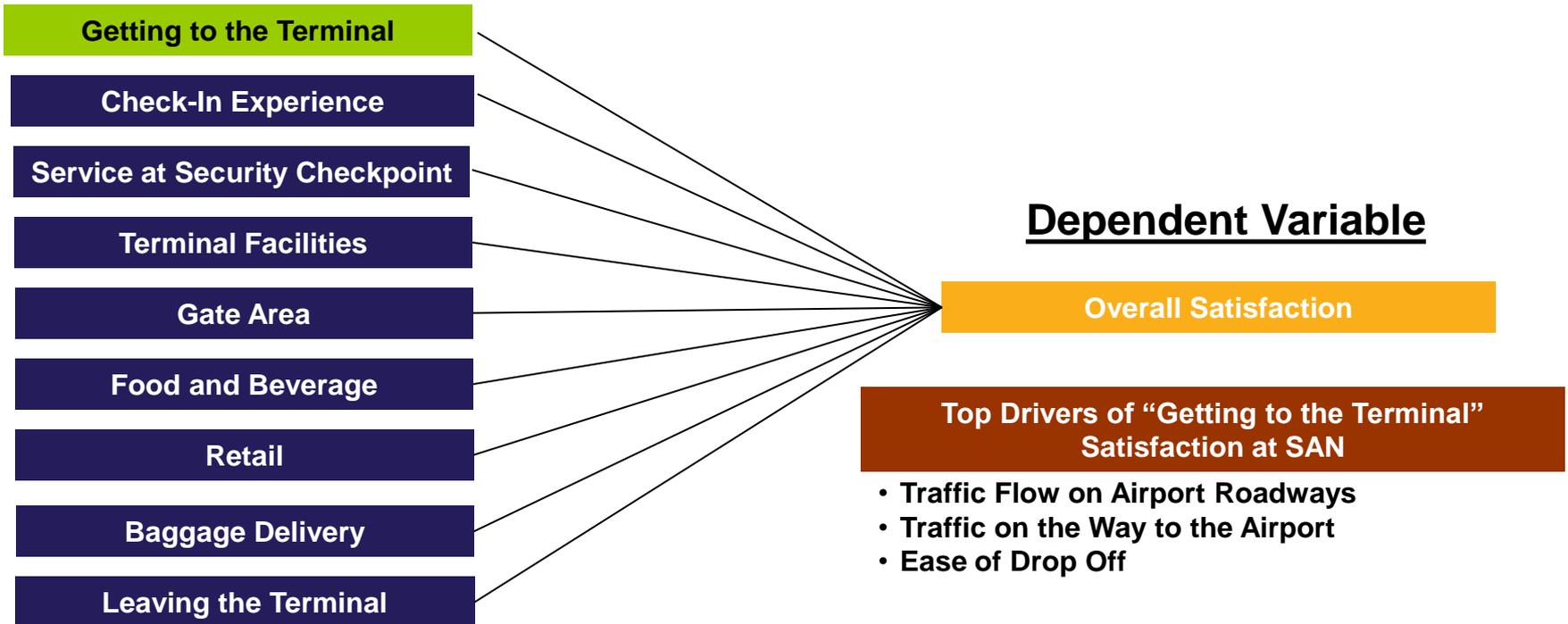
SAN Overall Total 2012

	SAN 2012	Terminal 1	Terminal 2	Commuter Terminal
Check-In Experience Overall	91%	89%	93%	93%
Gate Area Overall	90%	91%	90%	94%
Terminal Facilities Overall	87%	86%	87%	94%
Service at the Security Checkpoint Overall	86%	83%	89%	95%
Retail Services Overall	86%	86%	86%	86%
Food and Beverage Overall	84%	84%	83%	80%
Baggage Delivery Overall	82%	81%	84%	86%
Getting to the Terminal Overall	82%	82%	81%	89%
Leaving the Terminal Overall	76%	76%	74%	77%
Overall Satisfaction with SAN	86%	85%	87%	89%

Throughout this report SAN data are weighted composites based on terminal traffic. Individual terminal data are unweighted.

Percent responding Top Two Box, (i.e., rating the airport a "4" or "5" on a five-point scale). Scale runs from 1 = "Very Dissatisfied" to 5 = "Very Satisfied".

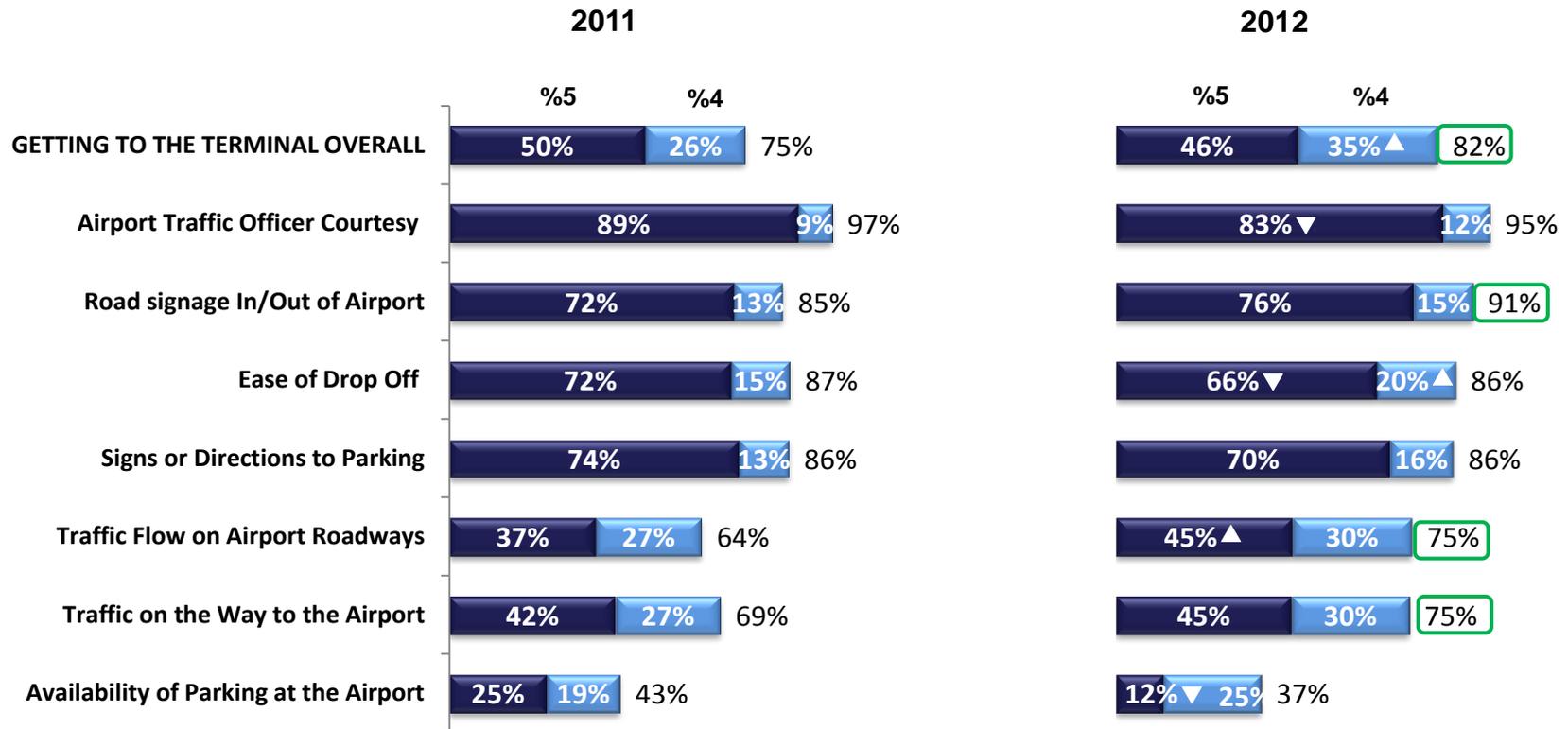
Independent Variables



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Satisfaction with “Getting to the Terminal” is Significantly Higher Overall and in Three Factors in 2012. Top Box Satisfaction Declines Significantly in Three Factors

Getting to the Terminal Top Two Box Percentages – 2012 Vs. 2011 – SAN Total



Please note: Percent may not add due to rounding. Significant differences @ the 95% confidence level are indicated by boxes and arrows.

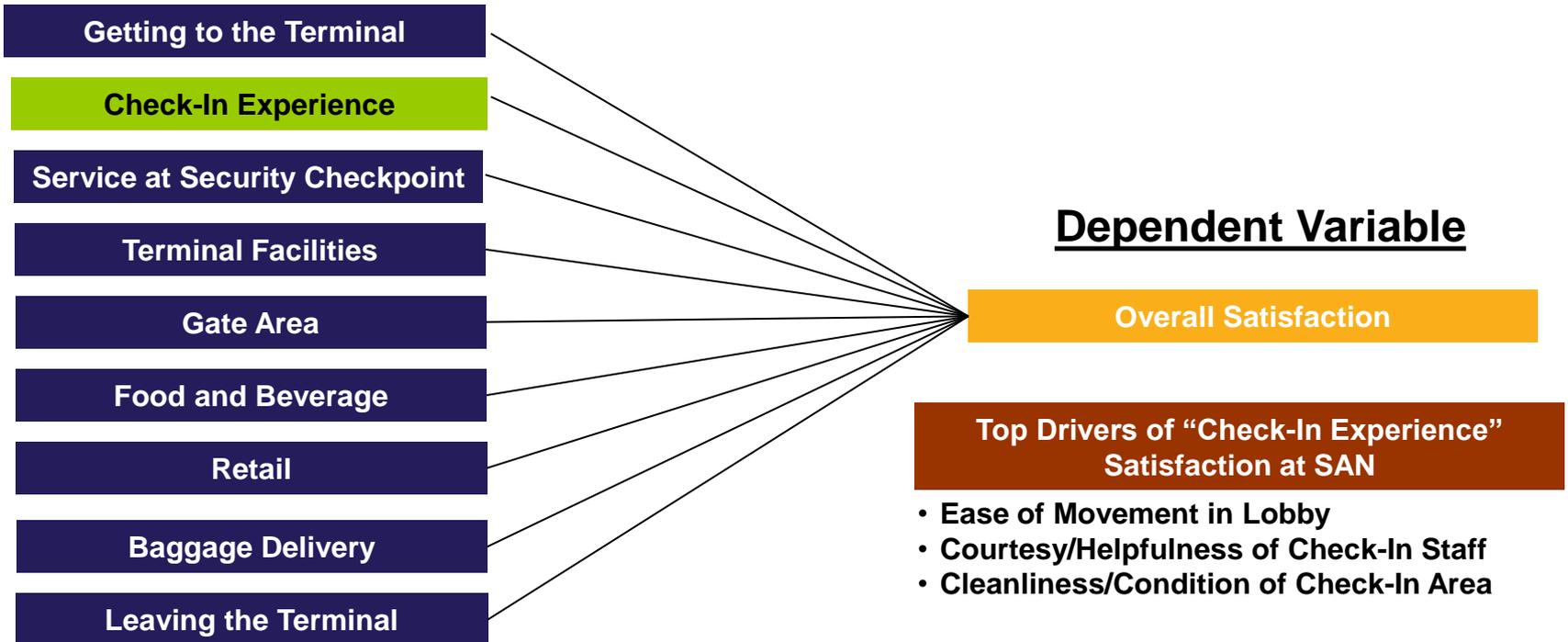
Satisfaction with “Getting to the Terminal Overall” Score is Lowest in Terminal 2

Getting to the Terminal Top Two Box Percentages – SAN Total 2012

	SAN	Terminal 1	Terminal 2	Commuter Terminal
Airport Traffic Officer Courtesy	95%	93%	98%	97%
Road Signage In/Out of Airport	91%	91%	91%	86%
Ease of Drop Off	86%	88%	83%	94%
Signs and Directions to Parking	86%	86%	85%	93%
Traffic Flow on Airport Roadways	75%	74%	76%	82%
Traffic on the Way to the Airport	75%	76%	72%	81%
Availability of Parking at the Airport	37%	36%	36%	50%
Getting to the Terminal Overall	82%	82%	81%	89%

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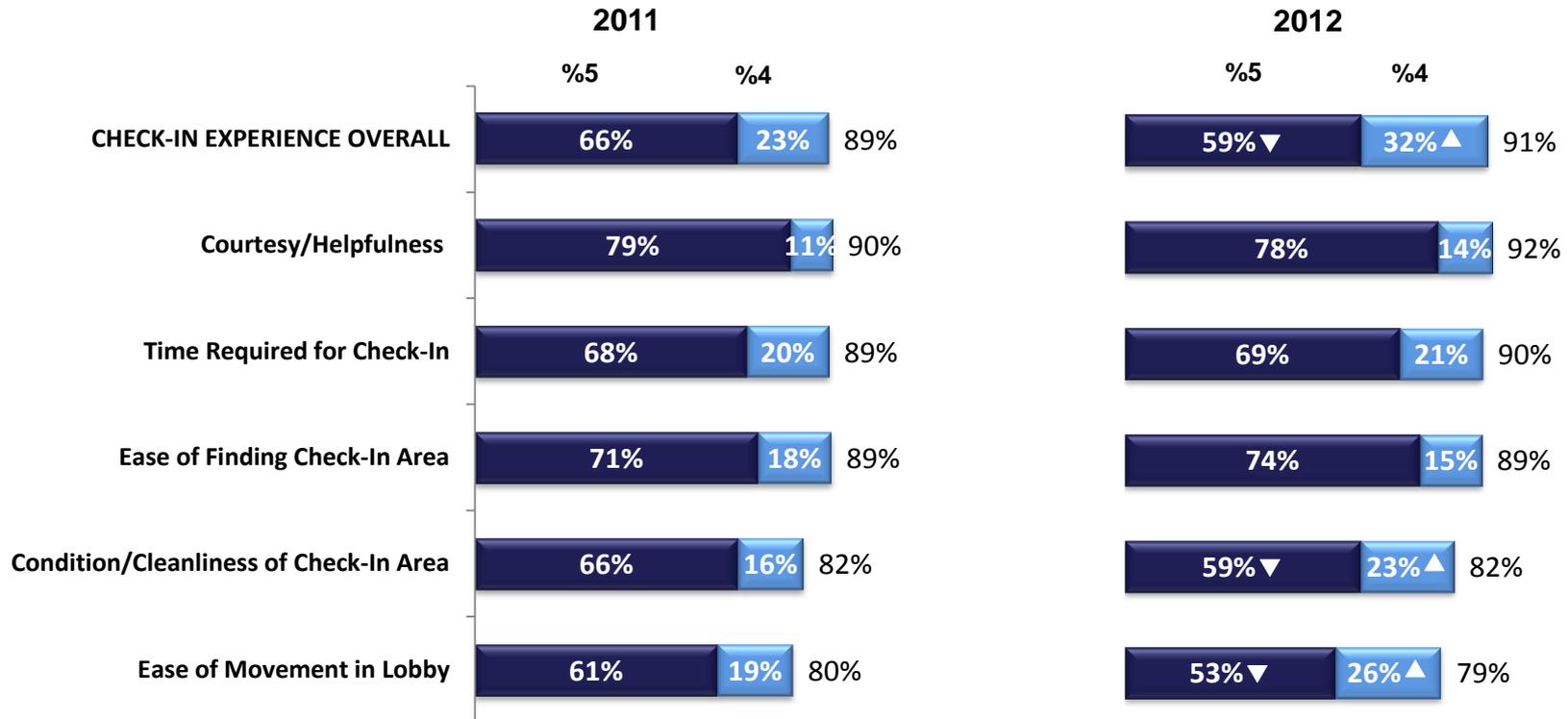
Independent Variables



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There are No Significant Differences in “Check-In Experience” Top 2 Box Scores but Significantly Fewer Passengers are “Very Satisfied” with the Check-In Experience Overall and Two Factors in 2012

Check-In Experience Top Two Box Percentages 2012 Vs. 2011 – SAN Total



Please note: Percent may not add due to rounding. Significant differences @ the 95% confidence level are indicated by boxes and arrows.

Satisfaction with “Check-In Experience Overall” Scores Lowest in Terminal 1

Check-In Experience Top Two Box Percentages – SAN Total 2012

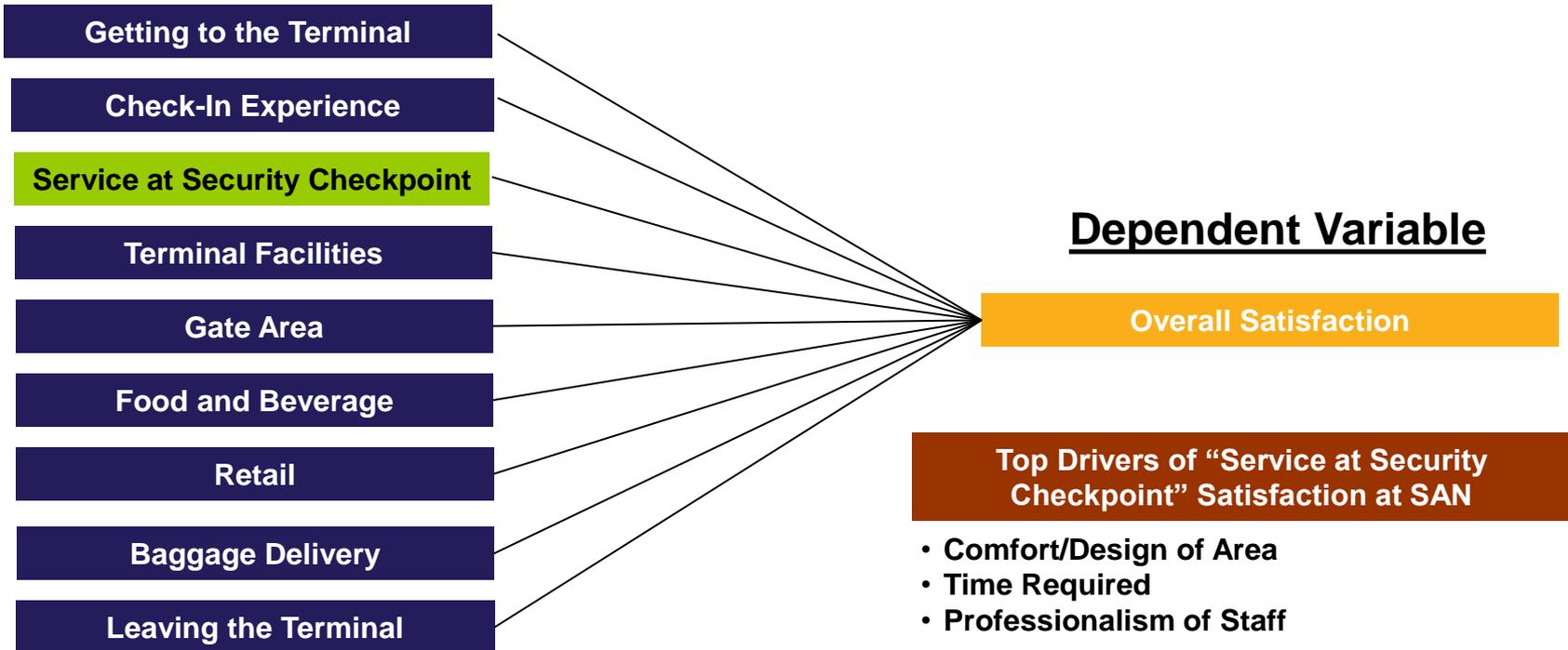
	SAN	Terminal 1	Terminal 2	Commuter Terminal
Courtesy/Helpfulness of Check-In Staff	92%	91%	92%	93%
Time Required for Check-In	90%	86%	93%	97%
Ease of Finding Check-In Area	89%	93%	86%	72%
Cleanliness/Condition of Check-In Area	82%	79%	86%	95%
Ease of Movement in Lobby	79%	76%	82%	90%
Check-In Experience Overall	91%	89%	93%	93%

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Percent responding Top Two Box, (i.e., rating the airport a “4” or “5” on a five-point scale). Scale runs from 1 = “Very Dissatisfied” to 5 = “Very Satisfied”.



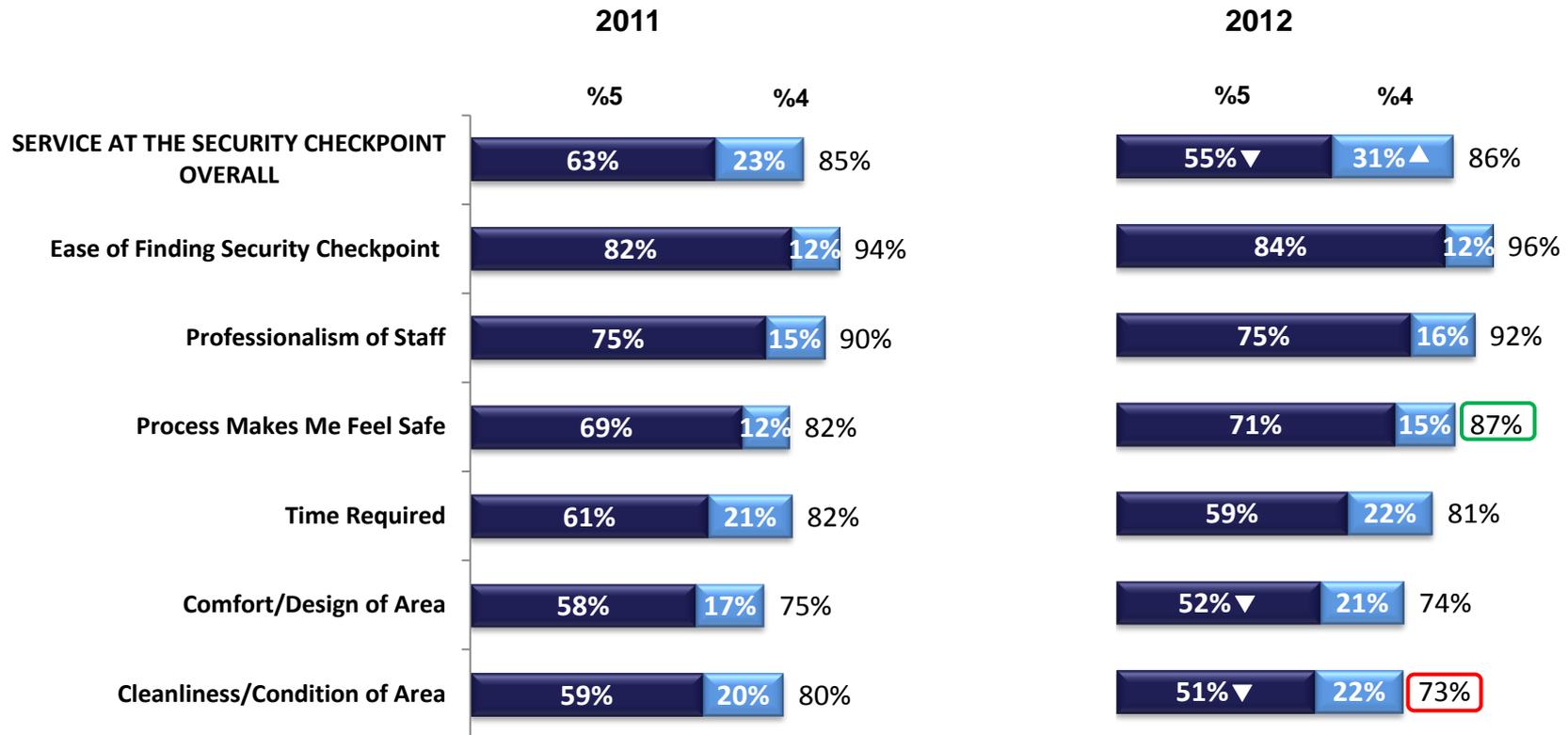
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Satisfaction with “Process Makes Me Feel Safe” Top 2 Box Scores Increase Significantly and “Cleanliness/Condition or Area” Decrease Significantly in 2012

Service at the Security Checkpoint Top Two Box Percentages – 2012 Vs. 2011 – SAN Total



Please note: Percent may not add due to rounding. Significant differences @ the 95% confidence level are indicated by boxes and arrows.

Satisfaction with Security Checkpoint Scores Lowest in Terminal 1 this Quarter

Service at the Security Checkpoint Top Two Box Percentages – SAN Total 2012

	SAN	Terminal 1	Terminal 2	Commuter Terminal
Ease of Finding Security Checkpoint	96%	98%	96%	83%
Professionalism of Staff	92%	92%	91%	96%
Process Makes Me Feel Safe	87%	87%	86%	86%
Time Required	81%	78%	83%	98%
Comfort/Design of Area	74%	69%	78%	94%
Cleanliness/Condition of Area	73%	68%	78%	93%
Service at the Security Checkpoint Overall	86%	83%	89%	95%

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Percent responding Top Two Box, (i.e., rating the airport a "4" or "5" on a five-point scale). Scale runs from 1 = "Very Dissatisfied" to 5 = "Very Satisfied".

Perceived Security Wait Time was 12.0 Minutes. Significantly More Passengers Felt they Waited Six to 10 Minutes in 2012

Minutes Waiting – 2012 Vs. 2011 – SAN Total

	2011	2012
Five minutes or less	26%	21%
Six to 10 minutes	26%	33%
Eleven to 15 minutes	23%	23%
Sixteen to 20 minutes	17%	15%
Twenty one to 25 minutes	5%	4%
More than 25 minutes	4%	3%
Mean Minutes	12.1	12.0


 Boxed numbers represent significant statistical differences from 2011 data at a 95% confidence interval.
 Green boxes indicate % is significantly higher and red boxes indicate % is significantly lower.



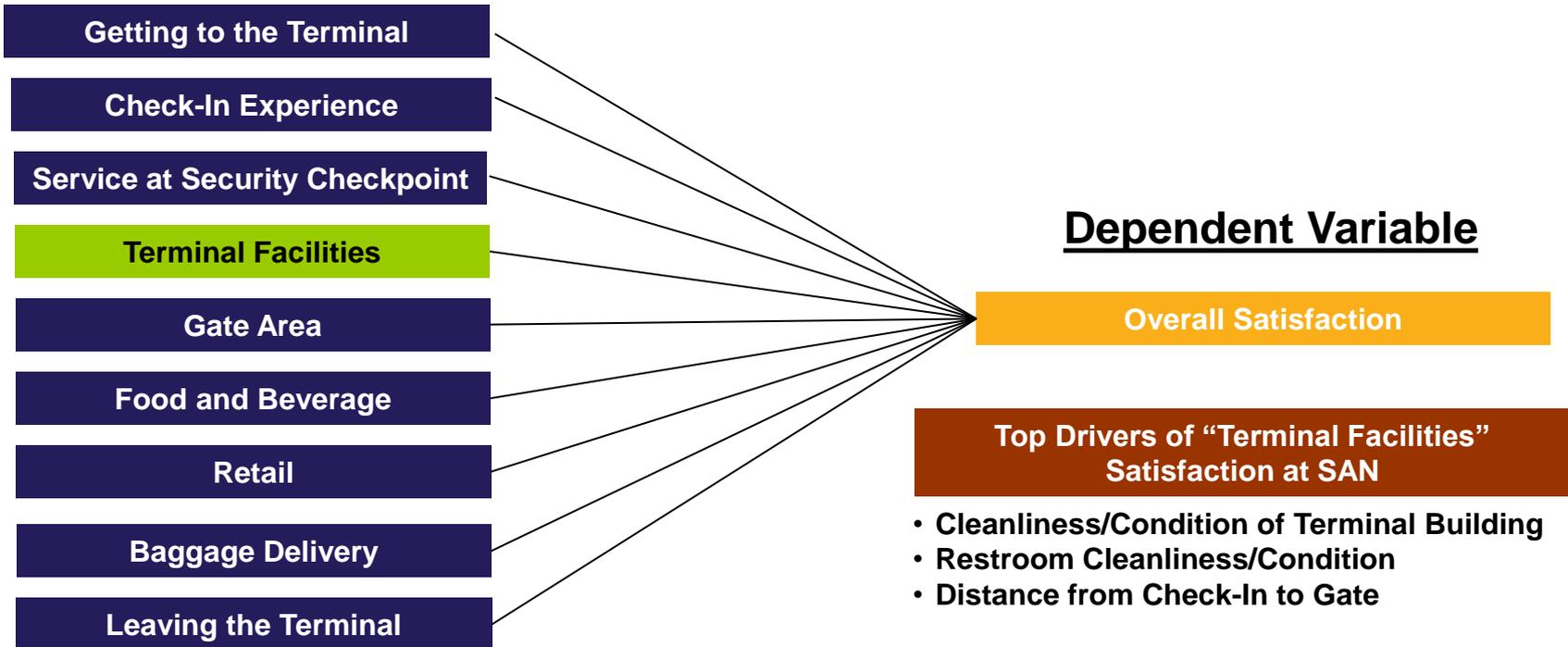
Perceived Security Wait Times by Terminal

The Commuter Terminal had the Shortest Wait Time in 2012

Minutes Waiting – 2012

	SAN	Terminal 1	Terminal 2	Commuter Terminal
Five minutes or less	21%	16%	22%	75%
Six to 10 minutes	33%	29%	39%	22%
Eleven to 15 minutes	23%	27%	20%	4%
Sixteen to 20 minutes	15%	19%	13%	1%
Twenty one to 25 minutes	4%	5%	4%	0%
More than 25 minutes	3%	3%	2%	0%
Mean Minutes	12.0	13.0	11.3	5.2

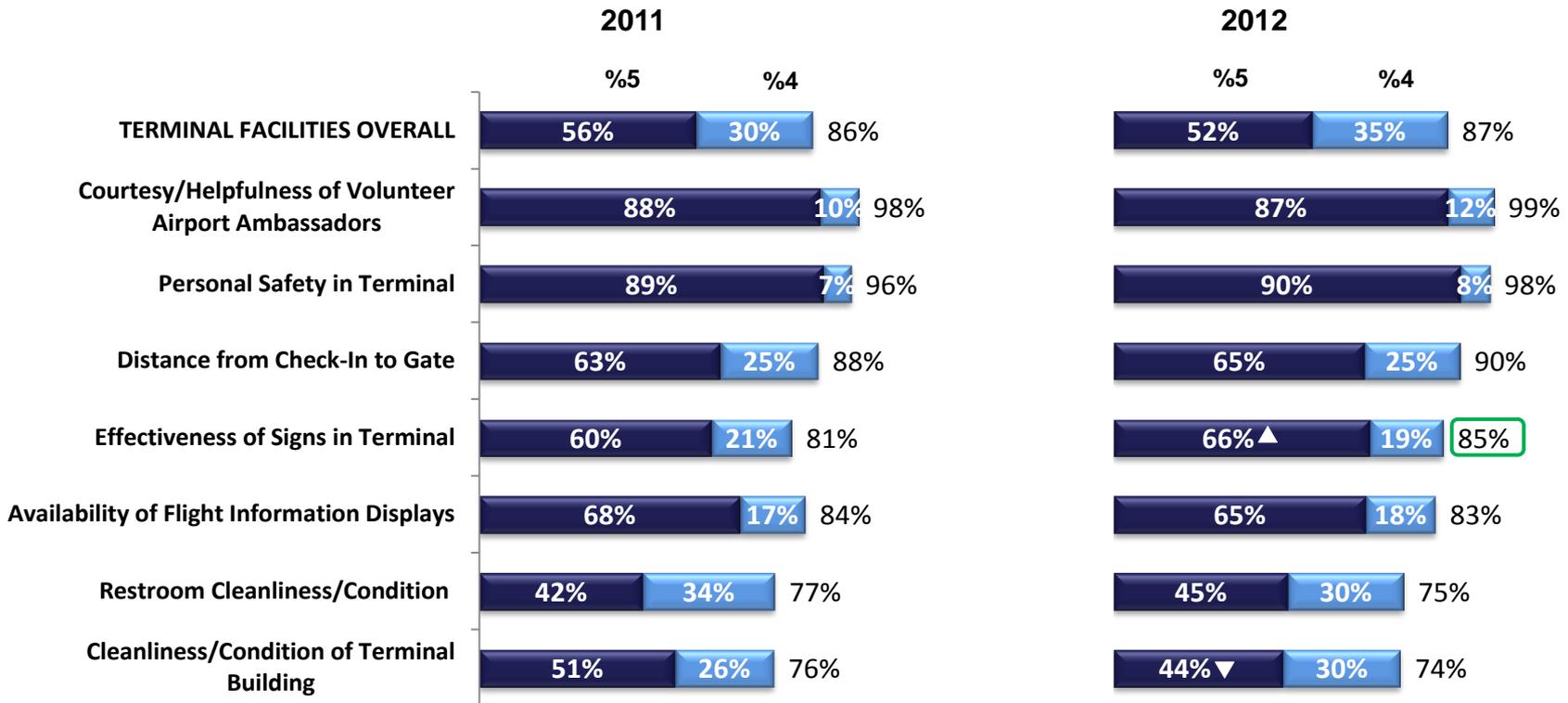
Independent Variables



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Satisfaction with “Effectiveness of Signs in Terminal” Increases Significantly. Significantly Fewer Passengers were “Very Satisfied” with Cleanliness/Condition of Terminal Building Compared to 2011

Terminal Facilities Top Two Box Percentages – 2012 Vs. 2011 – SAN Total



Please note: Percent may not add due to rounding. Significant differences @ the 95% confidence level are indicated by boxes and arrows.

Satisfaction with Terminal Facilities Overall is Lowest in Terminal 1

Terminal Facilities Top Two Box Percentages – SAN Total 2012

	SAN	Terminal 1	Terminal 2	Commuter Terminal
Courtesy/Helpfulness of Volunteer Airport Ambassadors	99%	99%	98%	99%
Personal Safety in Terminal	98%	98%	97%	98%
Distance from Check-In to Gate	90%	95%	81%	99%
Effectiveness of Signs in Terminal	85%	88%	82%	85%
Availability of FIDS	83%	86%	80%	83%
Restroom Cleanliness/Condition	75%	72%	79%	85%
Cleanliness/Condition of Terminal Building	74%	69%	80%	84%
Terminal Facilities Overall	87%	86%	87%	94%

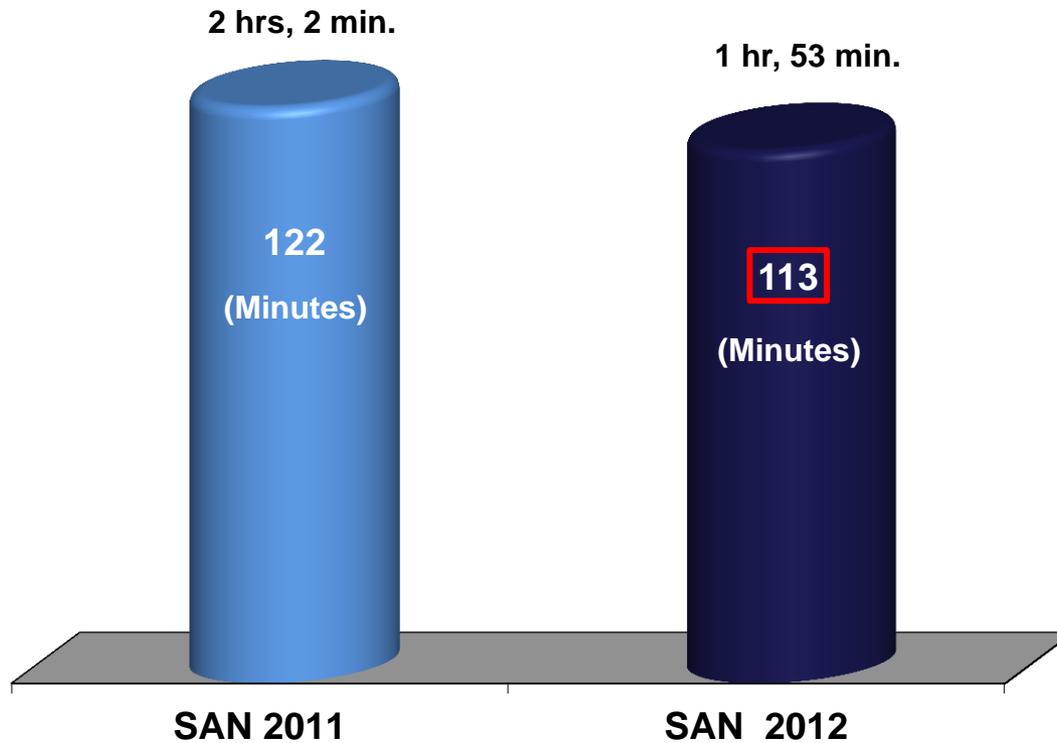
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Percent responding Top Two Box, (i.e., rating the airport a “4” or “5” on a five-point scale). Scale runs from 1 = “Very Dissatisfied” to 5 = “Very Satisfied”.

Dwell Times at SAN Decrease by Nine Minutes in 2012

Minutes Arriving Before Scheduled Departure – 2012 Vs. 2011 – SAN Total

Average Dwell Times



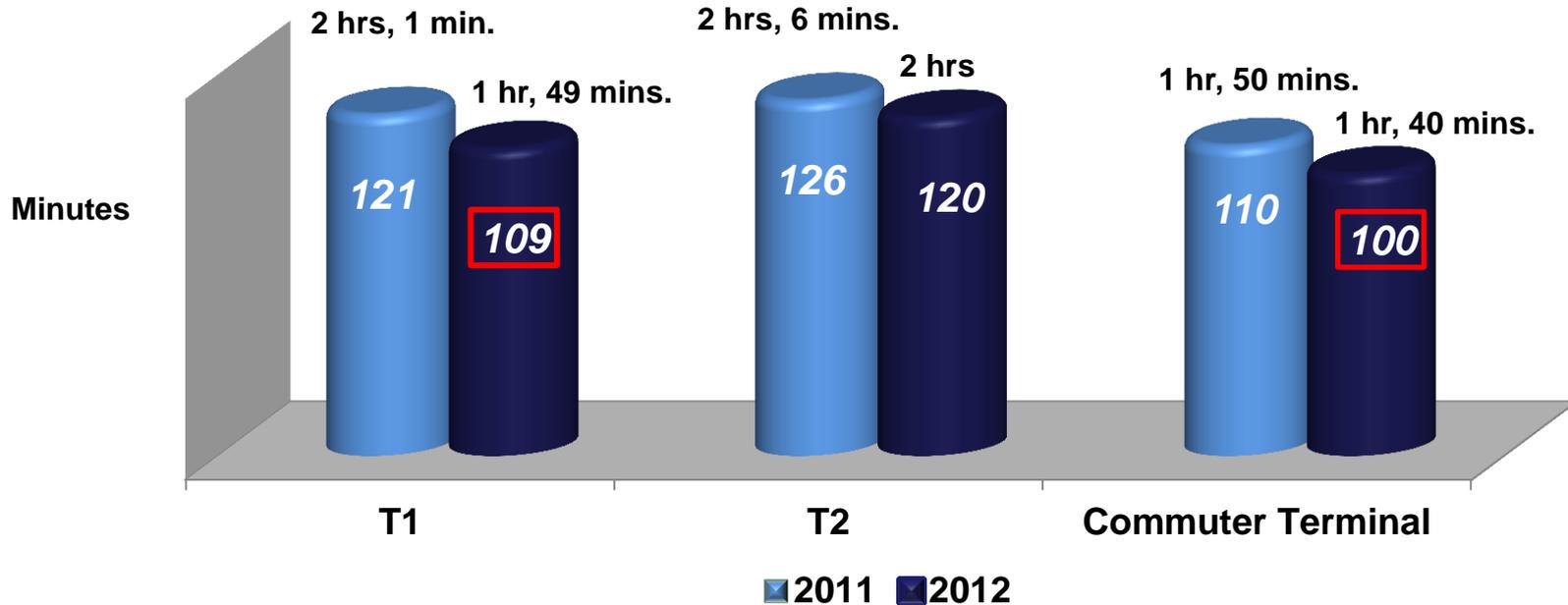
Boxed numbers represent significant statistical differences from 2011 data at a 95% confidence interval. Green boxes indicate % is significantly higher and red boxes indicate % is significantly lower.

Dwell Times by Terminal

Average Dwell Time in Terminal 1 and the Commuter Terminal are Significantly Lower in 2012

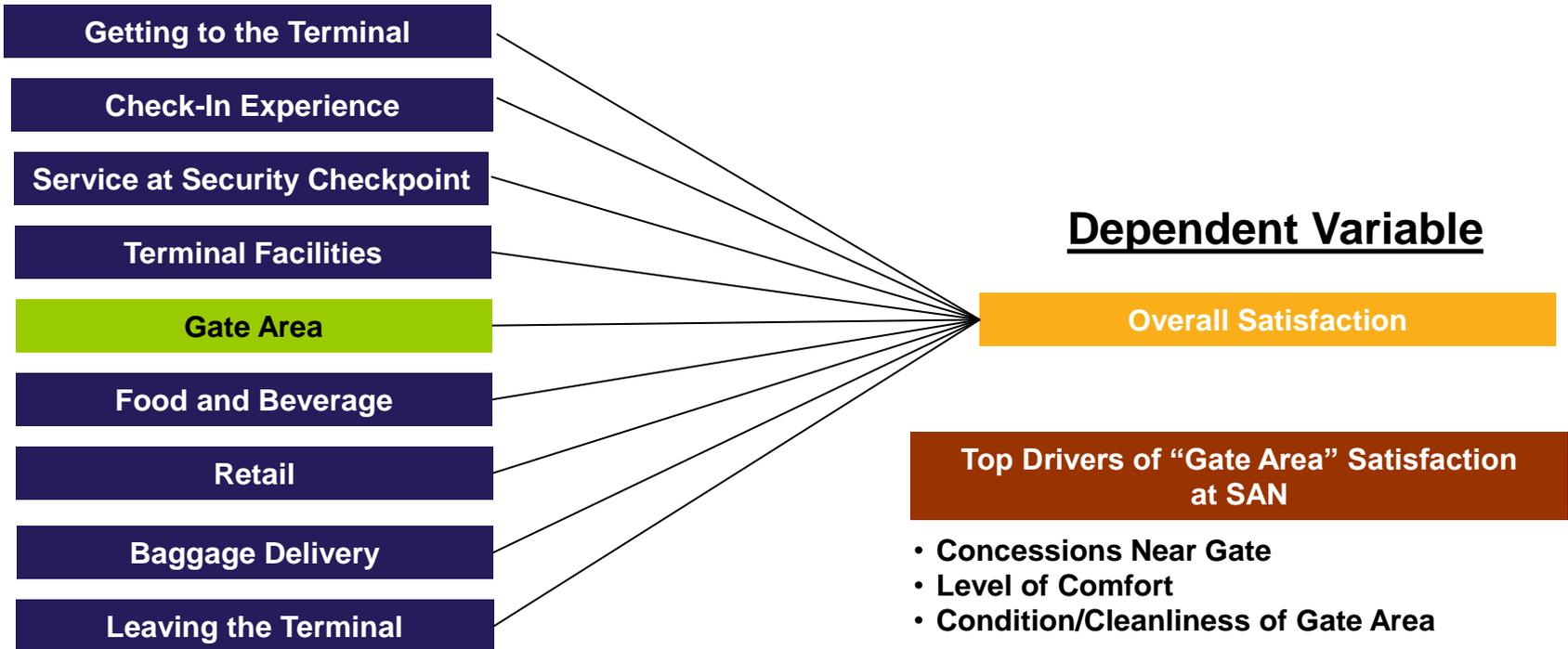
Minutes Arriving Before Scheduled Departure – 2012 Vs. 2011

Average Dwell Times



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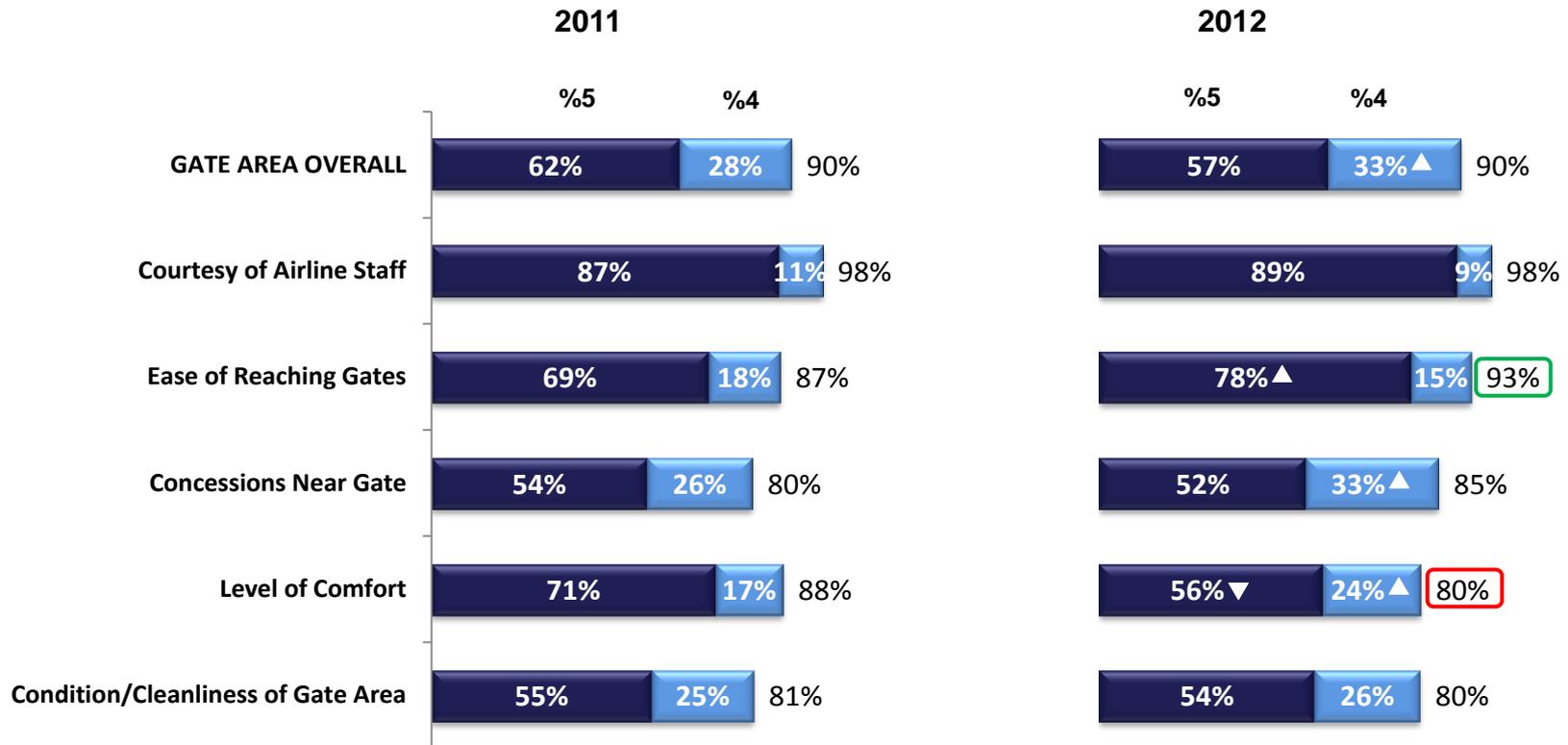
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Satisfaction with “Ease of Reaching Gates” Increases Significantly and Satisfaction with “Level of Comfort” Decreases Significantly in 2012

Gate Area Top Two Box Percentages – 2012 Vs. 2011 – SAN Total



Please note: Percent may not add due to rounding. Significant differences @ the 95% confidence level are indicated by boxes and arrows.

Nine out of Ten Passengers at SAN are Satisfied with the “Gate Area Overall”

Gate Area Top Two Box Percentages – SAN Total 2012

	SAN	Terminal 1	Terminal 2	Commuter Terminal
Courtesy of Airline Staff	98%	98%	97%	99%
Ease of Reaching Gates	93%	93%	92%	99%
Concessions Near Gate	85%	84%	86%	83%
Level of Comfort	80%	82%	77%	84%
Condition/Cleanliness of Gate Area	80%	80%	80%	91%
GATE AREA OVERALL	90%	91%	90%	94%

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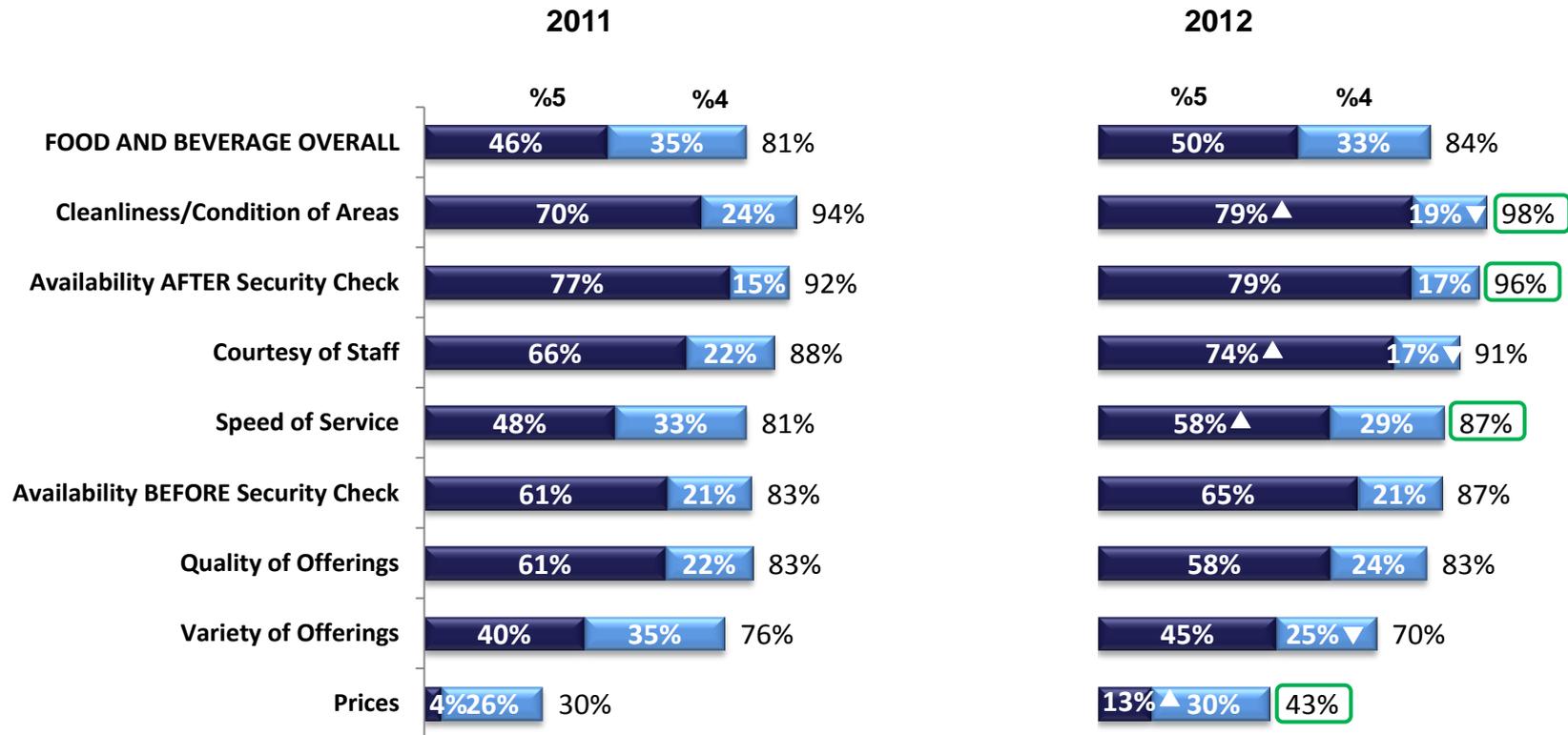
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Satisfaction with Food and Beverage Increases Significantly in Four Factors in 2012

Food and Beverage Service Top Two Box Percentages – 2012 Vs. 2011 – SAN Total



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“Food and Beverage” Services Rated Lowest in the Commuter Terminal

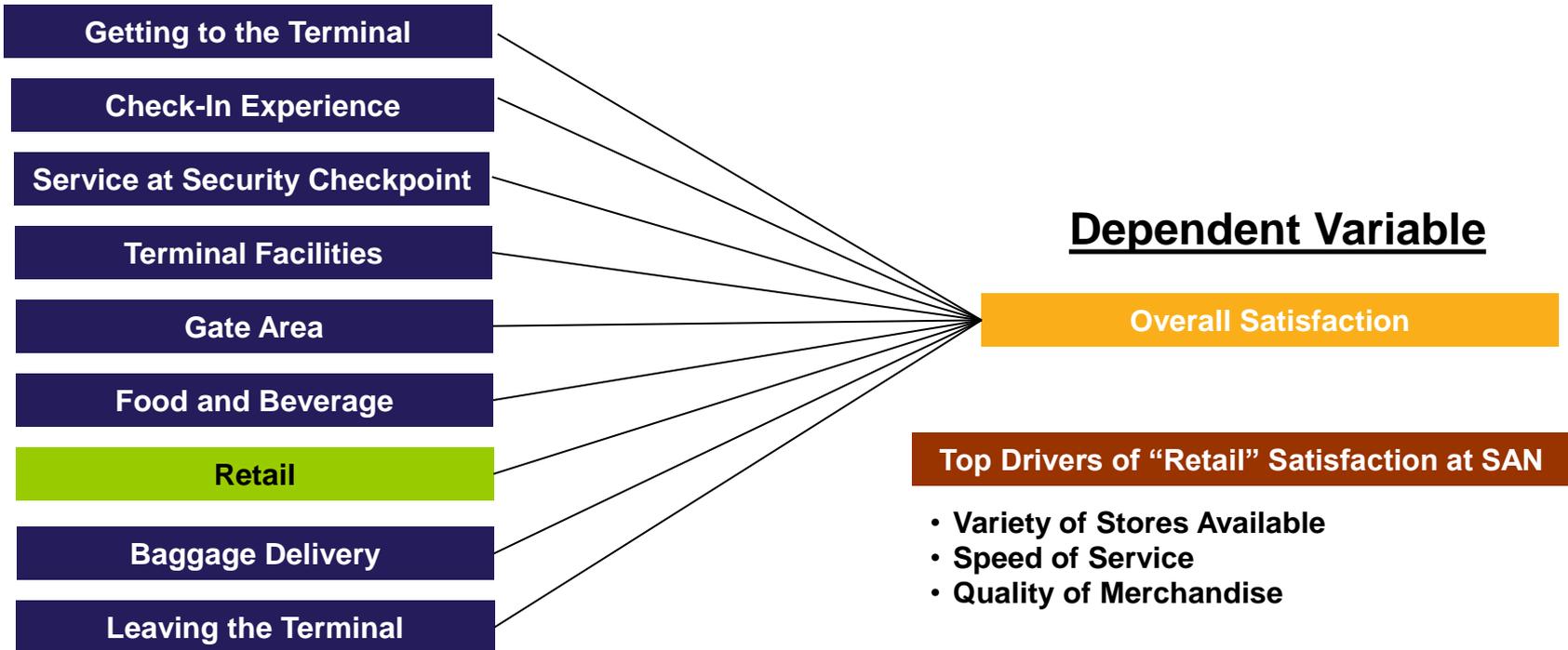
Food and Beverage Service Top Two Box Percentages – SAN Total 2012

	SAN	Terminal 1	Terminal 2	Commuter Terminal
Cleanliness/Condition of Areas	98%	97%	98%	99%
Availability AFTER Security Check	96%	98%	94%	87%
Courtesy of Staff	91%	91%	90%	94%
Speed of Service	87%	86%	88%	94%
Availability BEFORE Security Check	87%	91%	84%	40%
Quality of Offerings	83%	83%	82%	83%
Variety of Offerings	70%	68%	75%	50%
Prices	43%	46%	38%	51%
Food and Beverage Overall	84%	84%	83%	80%

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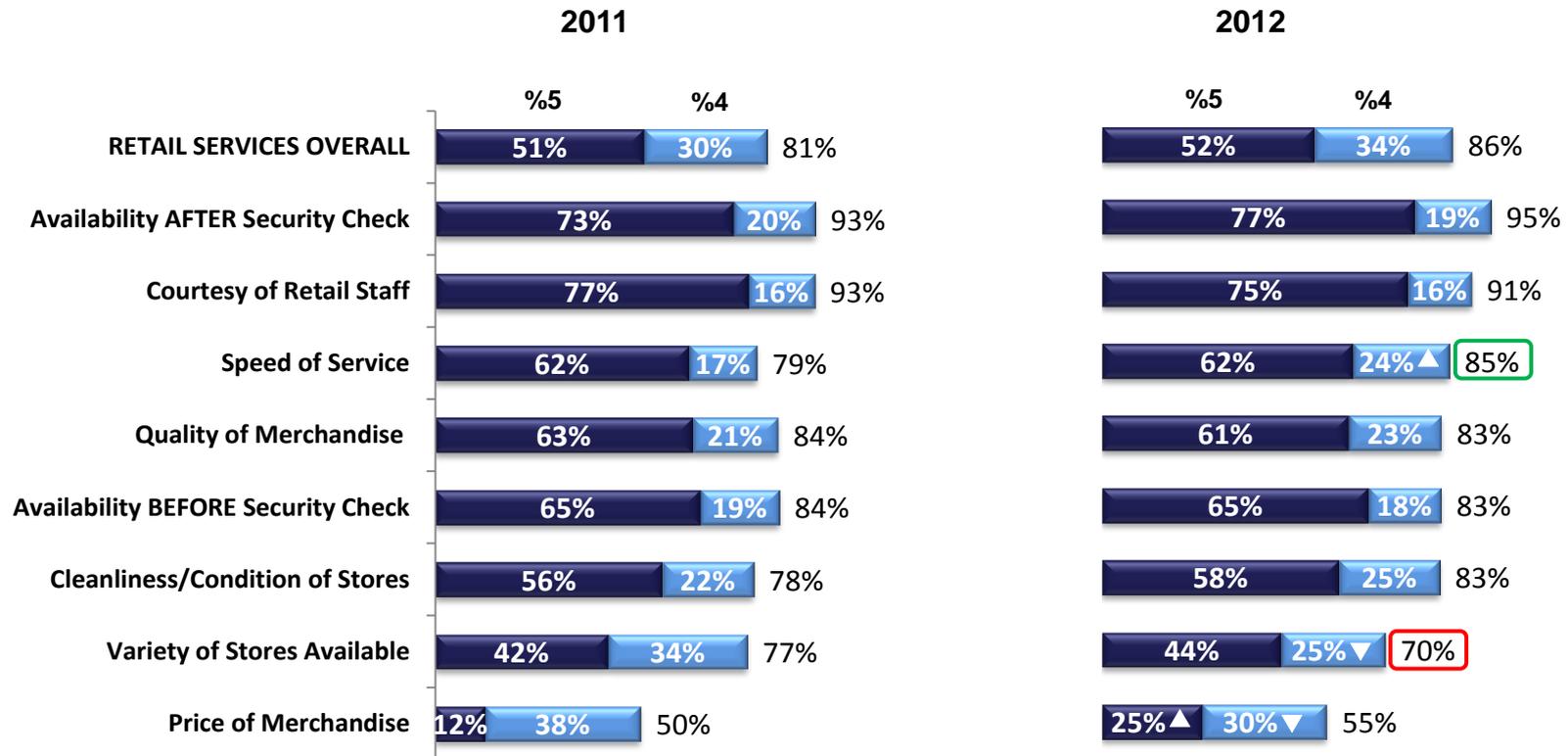
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Satisfaction with “Speed of Service” Top 2 Box Scores is Significantly Higher and “Variety of Stores Available” is Significantly Lower in 2012

Retail Top Two Box Percentages – 2012 Vs. 2011 – SAN Total



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Satisfaction Scores are Comparable across all Terminals with Regards to Retail Services

Retail Top Two Box Percentages – SAN Total 2012

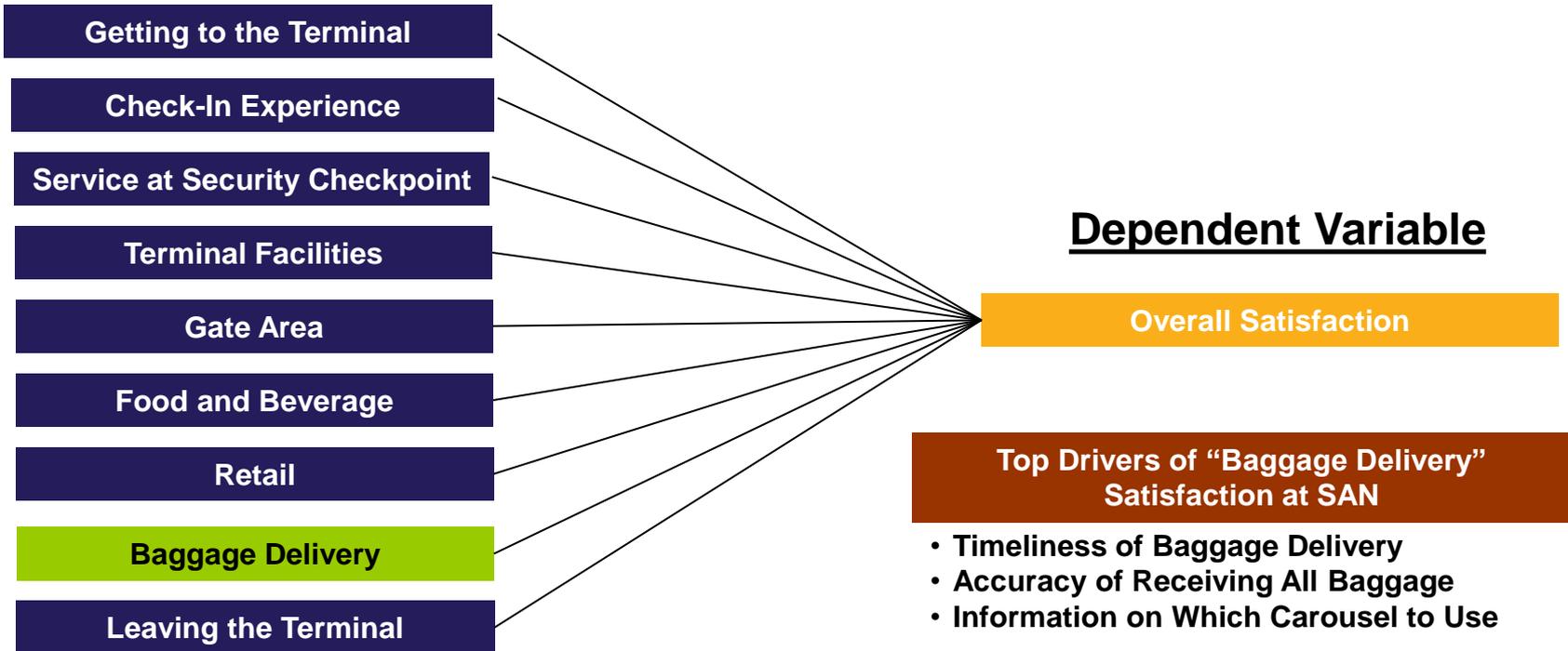
	SAN	Terminal 1	Terminal 2	Commuter Terminal
Availability AFTER Security Check	95%	97%	94%	90%
Courtesy of Retail Staff	91%	91%	90%	97%
Speed of Service	85%	85%	85%	95%
Quality of Merchandise	83%	83%	84%	89%
Availability BEFORE Security Check	83%	91%	76%	39%
Cleanliness/Condition of Stores	83%	81%	84%	94%
Variety of Stores Available	70%	69%	72%	48%
Price of Merchandise	55%	57%	52%	63%
Retail Services Overall	86%	86%	86%	86%

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Percent responding Top Two Box, (i.e., rating the airport a "4" or "5" on a five-point scale). Scale runs from 1 = "Very Dissatisfied" to 5 = "Very Satisfied".



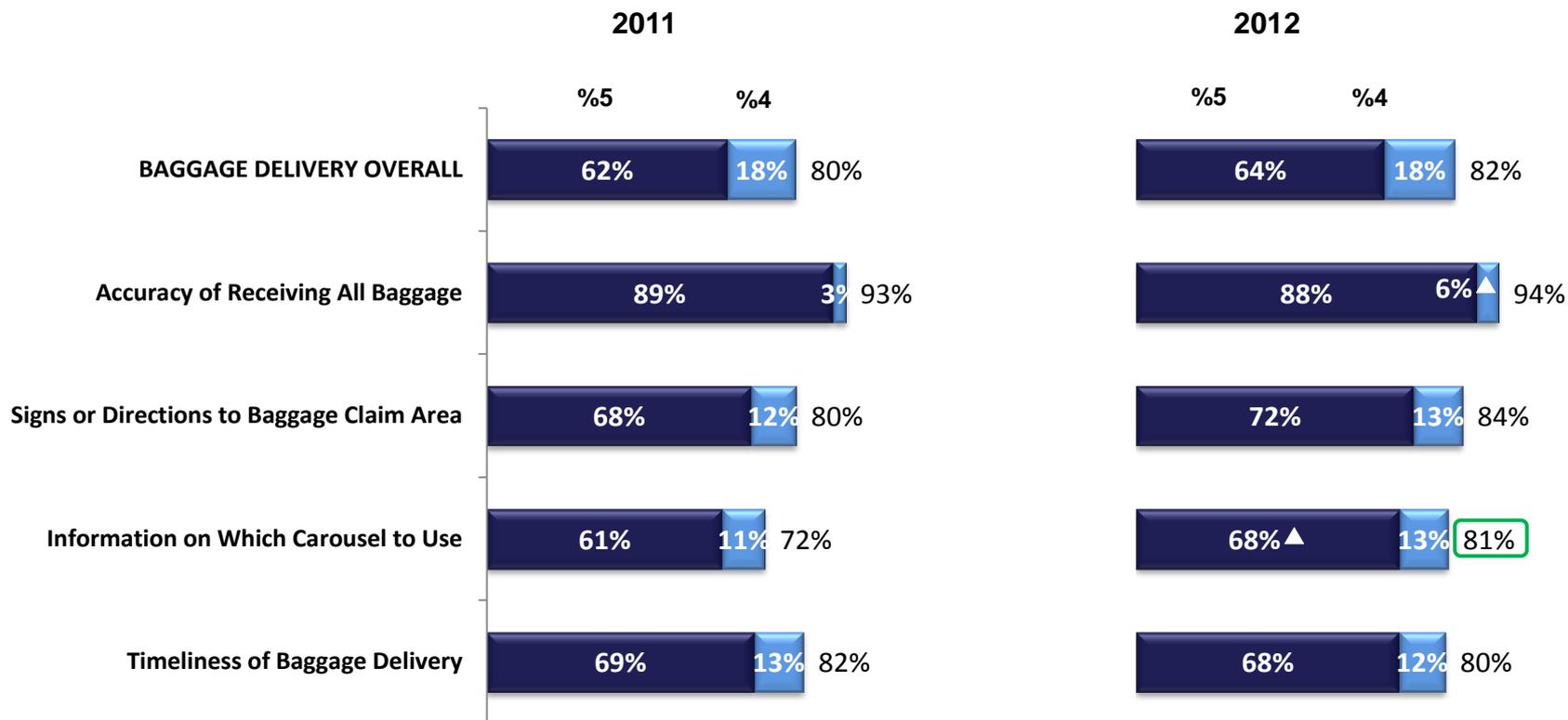
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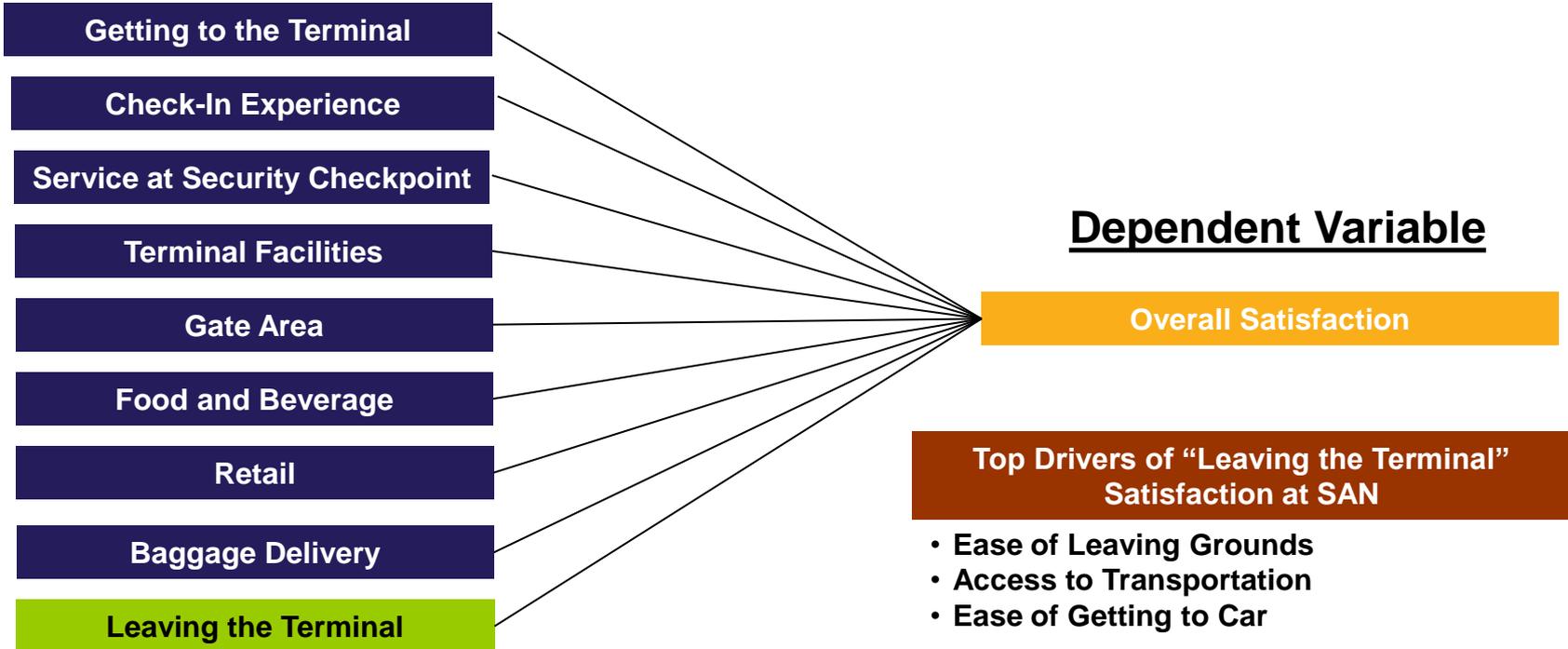
Satisfaction with “Information on Which Carousel to Use” is Significantly Higher Compared to 2011 among All Respondents

Baggage Delivery Top Two Box Percentages – 2012 Vs. 2011 – SAN Total



Please note: Percent may not add due to rounding. Significant differences @ the 95% confidence level are indicated by boxes and arrows.

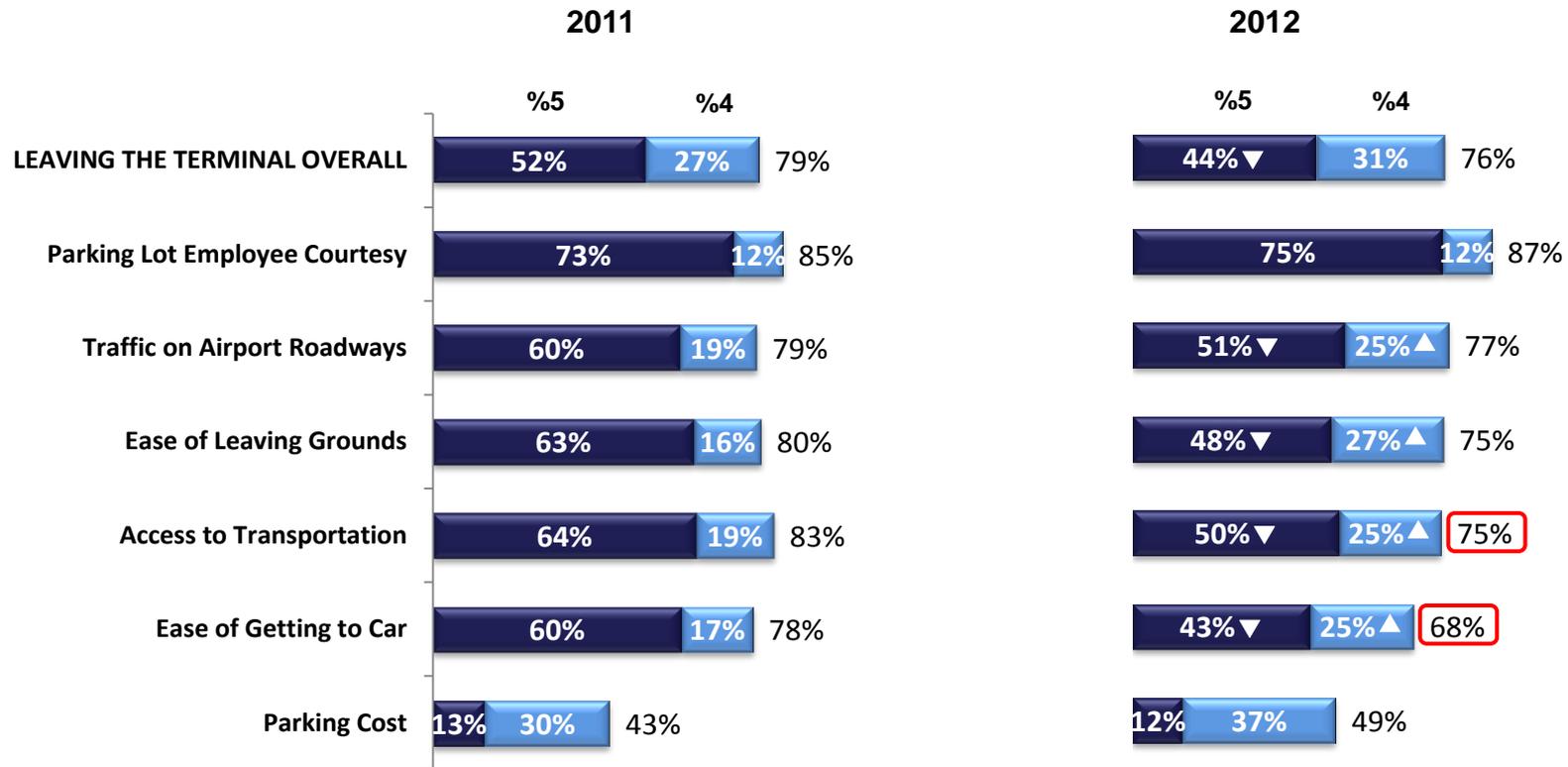
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Satisfaction with “Access to Transportation” and “Ease of Getting to Car” Top 2 Box Scores are Significantly Lower Compared to 2011

Leaving the Terminal Top Two Box Percentages – 2012 Vs. 2011 – SAN Total



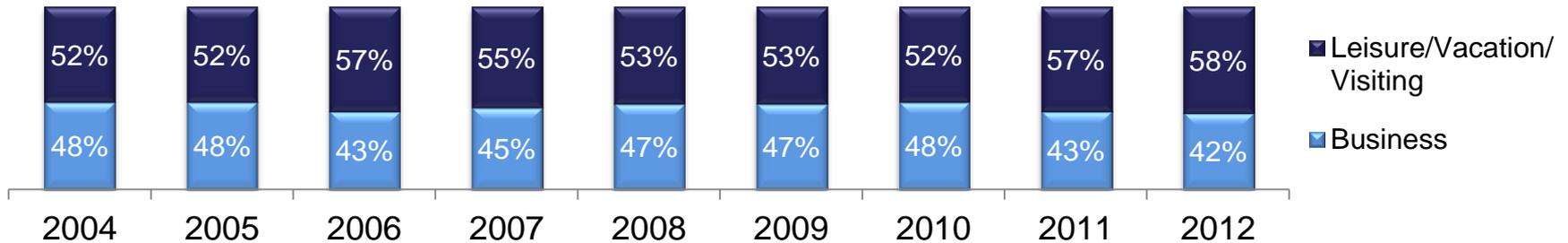
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Other Data Gathered 2012



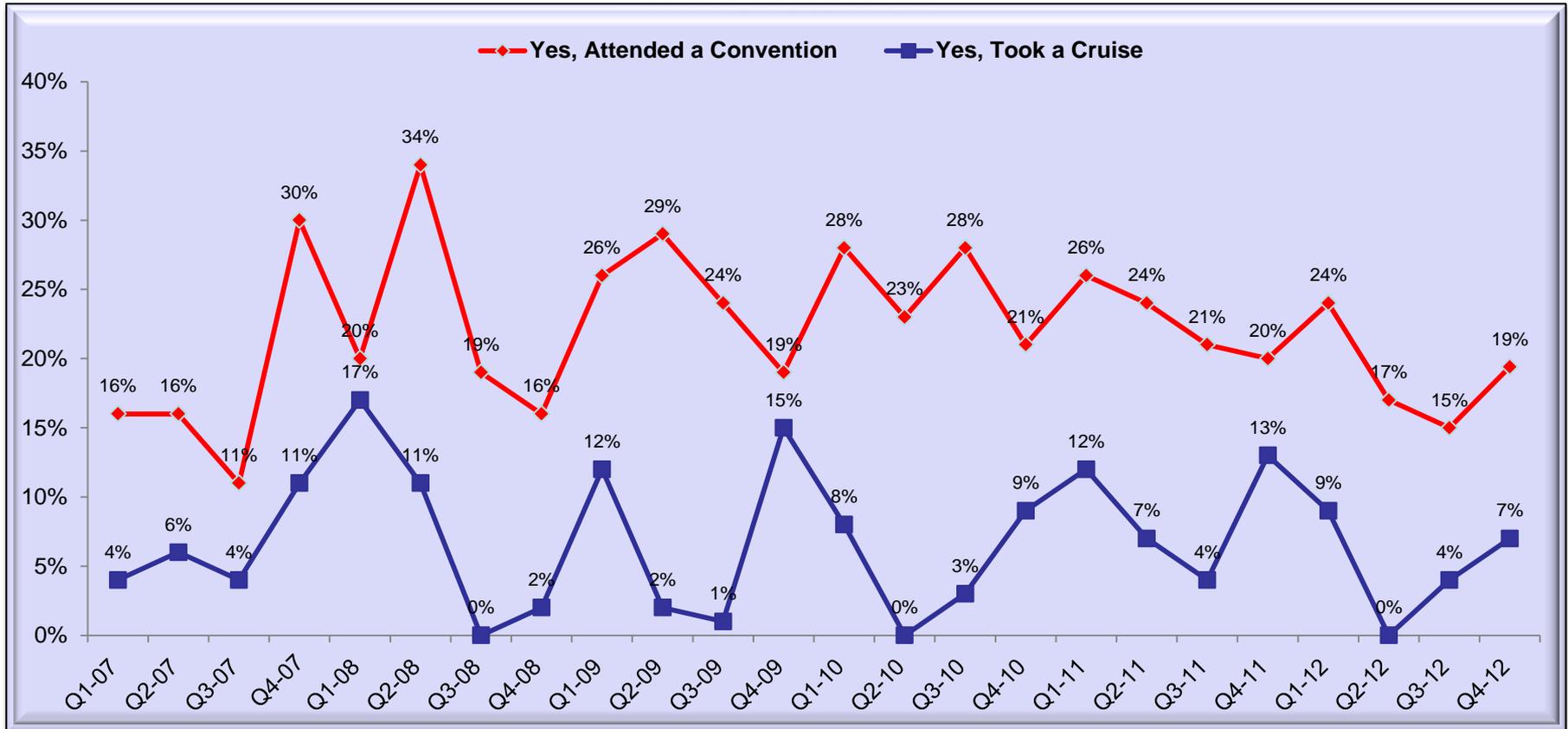
Primary Purpose for Trip

What is the primary purpose of your trip today?



19% of 2012 Visitors Attended a Convention While in San Diego

5% of 2012 Visitors Took a Cruise



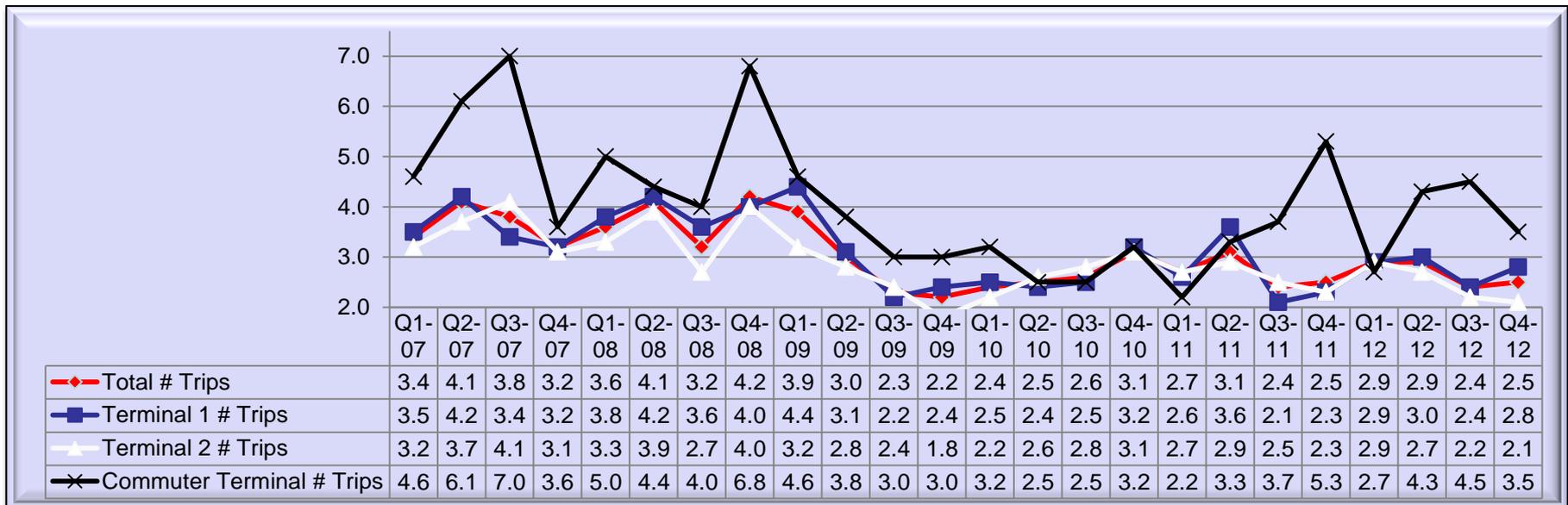
Base: Total answering visited San Diego

Number of Roundtrips Through SAN

Annual Roundtrips – 2012 SAN Total

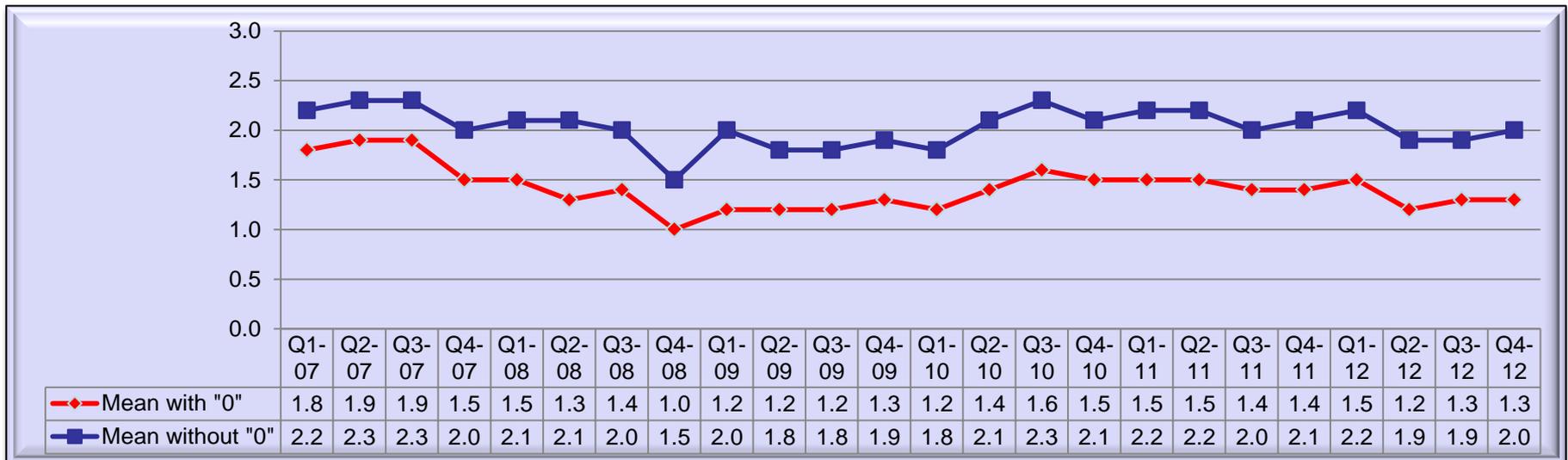
	SAN 2012	Terminal 1	Terminal 2	Commuter Terminal
One	60%	59%	62%	57%
Two or Three	21%	19%	23%	19%
Four or Five	9%	11%	7%	6%
Six to Ten	6%	7%	3%	12%
Eleven or More	4%	4%	4%	7%
Mean Trips per Year	2.7	2.7	2.5	3.7

Average Number of Annual Roundtrips Through SAN



Checked Bags for Departing Passengers

	SAN 2012
Did you check any bags today? Yes...	67%
How many?	
(None)	(33%)
One	31%
Two	19%
Three	9%
Four	5%
Five or more	4%
Mean with zero	1.4 bags
Mean without zero	2.0 bags
Average Number of People in Travel Party	1.6



Please note: Percentages may not add to 100% due to rounding.

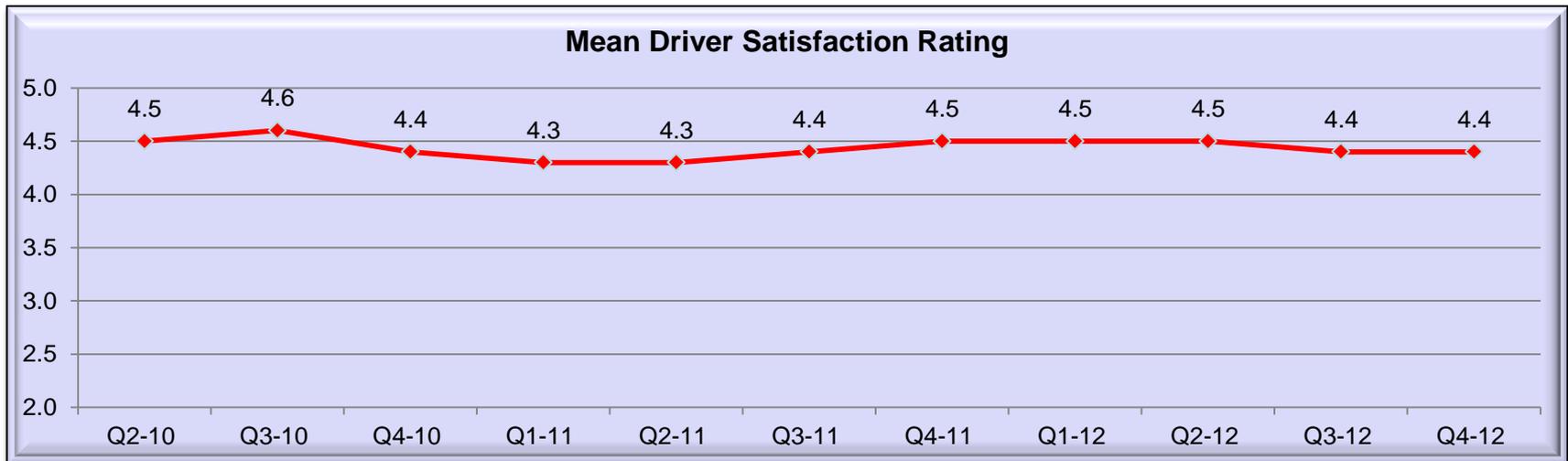
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Phoenix Travel, Leisure and Entertainment

How Satisfied were you with the Level of Customer Service Provided by the Driver of the Mode of Transportation you Took to San Diego International Airport Today?

	SAN 2012
Driver Customer Service Satisfaction Rating	
Top 2 Box	87%
Five (Very Satisfied)	62%
Four	25%
Three	11%
Net Bottom 2 Box	3%
Two	2%
One (Very Dissatisfied)	*
Mean	4.5



Base: Passengers that took a form of transportation to SAN other than their private or company car: 2012 n=(403), Q4'12 n = (93).

Please note: Percentages may not add to 100% due to rounding. * = <0.5%

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Thank You!

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