

UPDATE ON THE AIRPORT DEVELOPMENT PLAN (ADP)

San Diego International Airport

San Diego County Regional Airport Authority Board Meeting

March 7, 2013



SAN DIEGO
INTERNATIONAL
AIRPORT

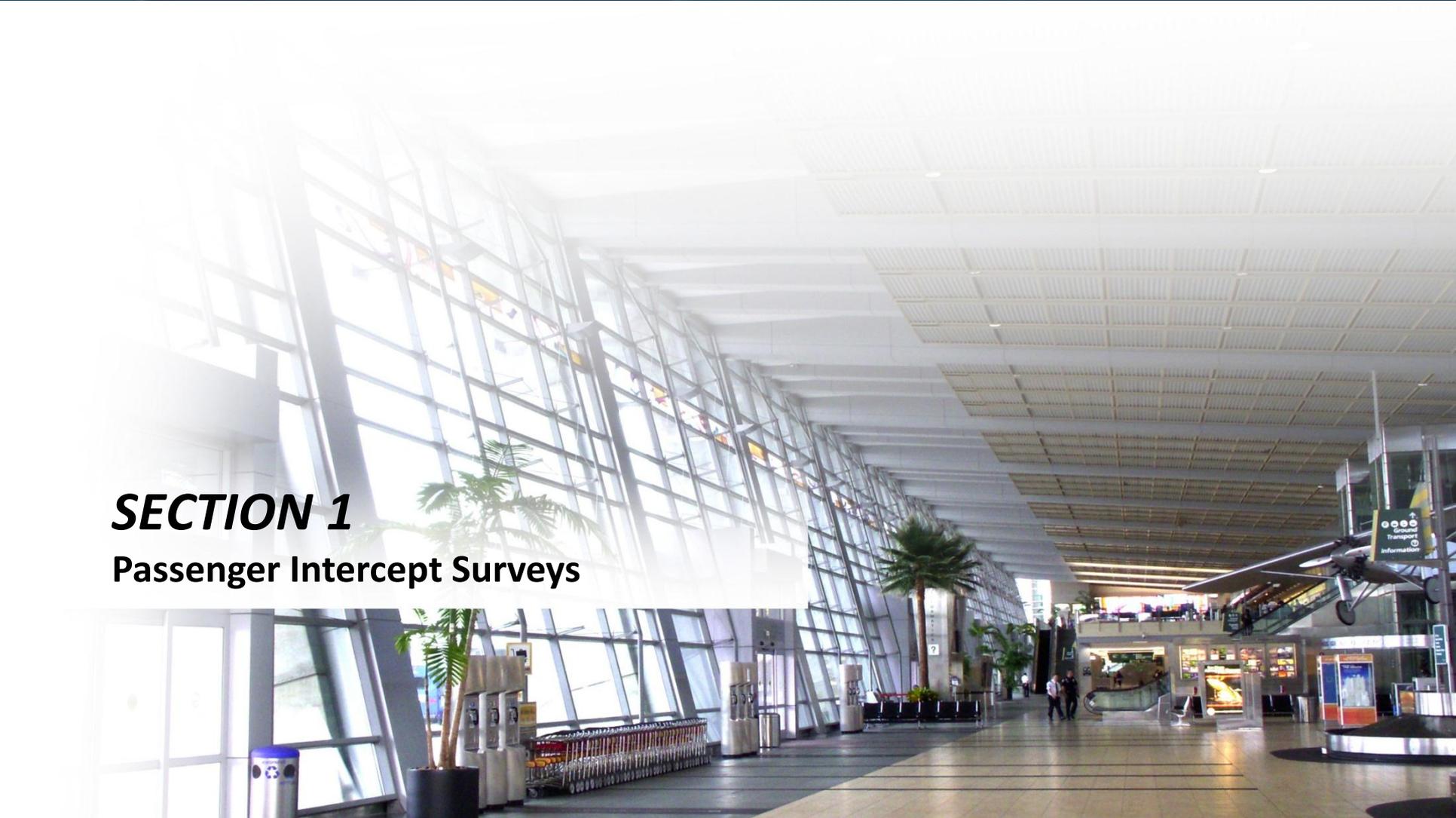
SDIA AIRPORT DEVELOPMENT PLAN

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Management Consultants

Agenda

- **Passenger Intercept Surveys**
- **Stakeholder Coordination**
- **Next Steps**





SECTION 1
Passenger Intercept Surveys



Survey Purpose and Goals

- **To gain an understanding of SDIA passenger profile characteristics**
- **To collect passenger trip origin locations and determine catchment area**
- **To determine the drivers that influence air travel choices**
- **To understand the reasons passengers travel to the San Diego region**
- **To gather ground access and parking data in an effort to understand modal choices and preferences involved in accessing SDIA**
- **To compare with 2009 survey results and identify potential new trends**



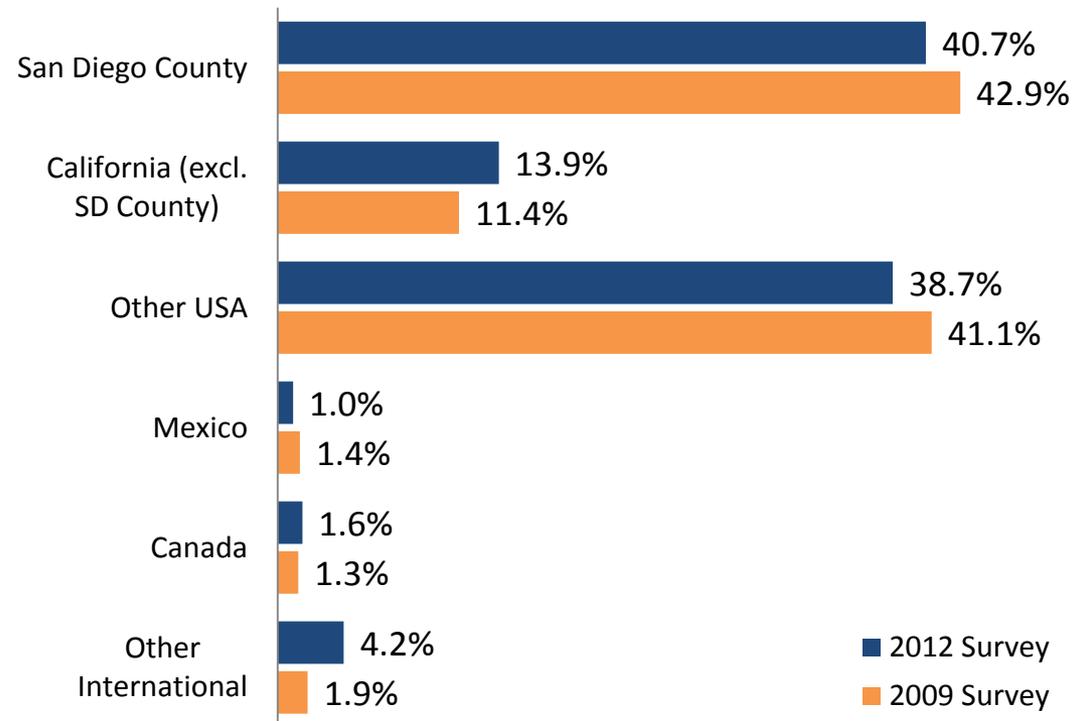
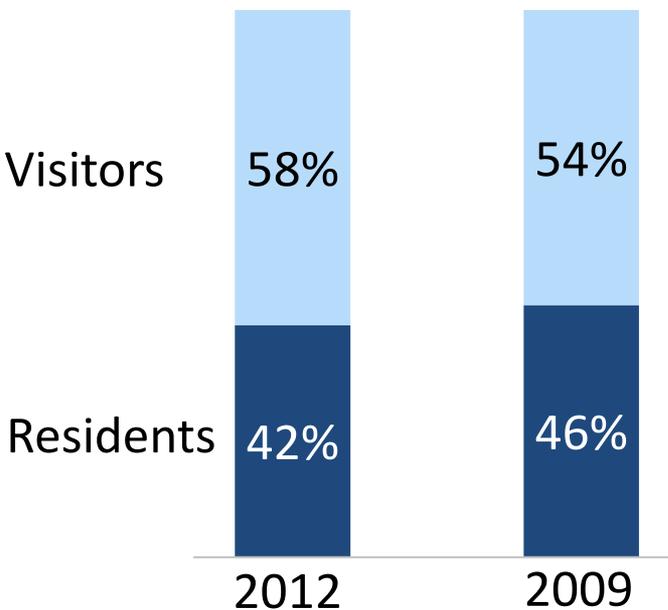
Survey Methodology

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



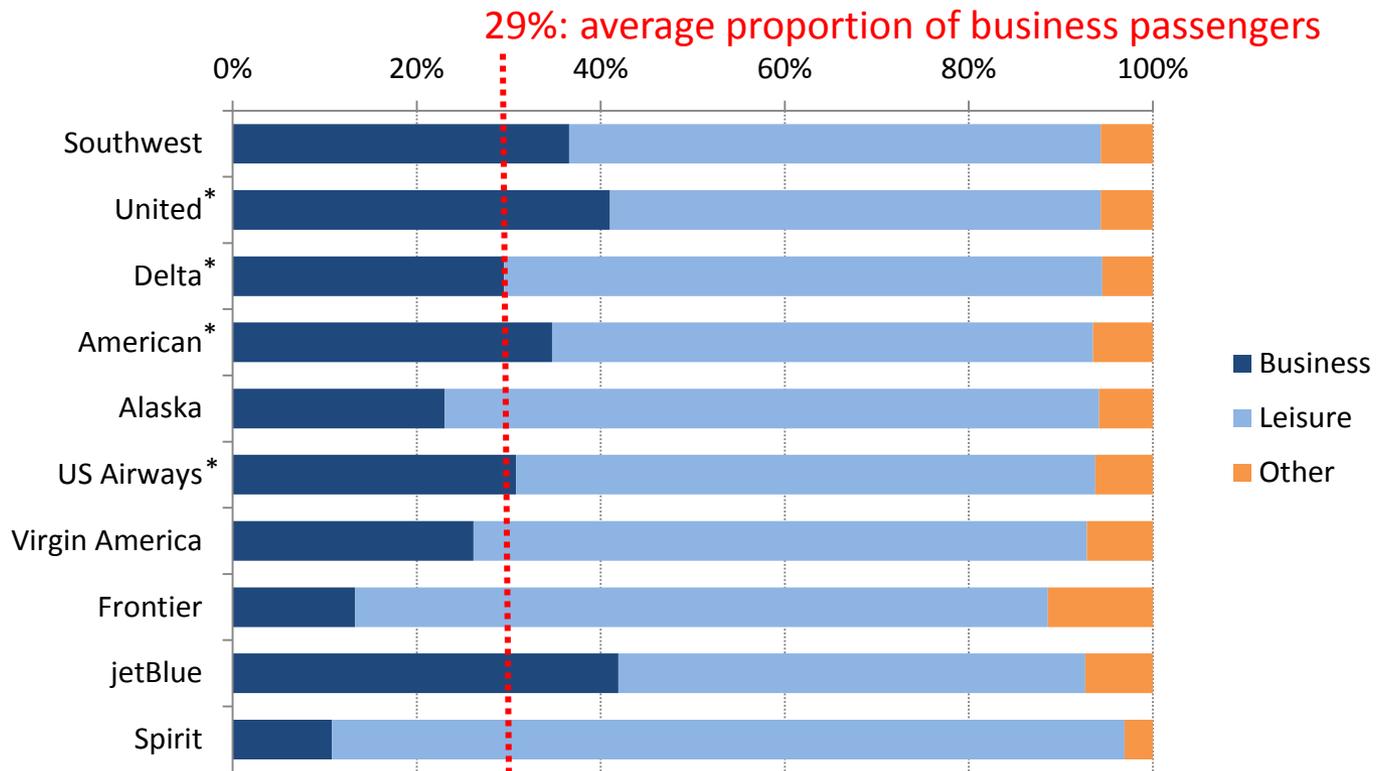
Primary Residence of Surveyed Passengers

- 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



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

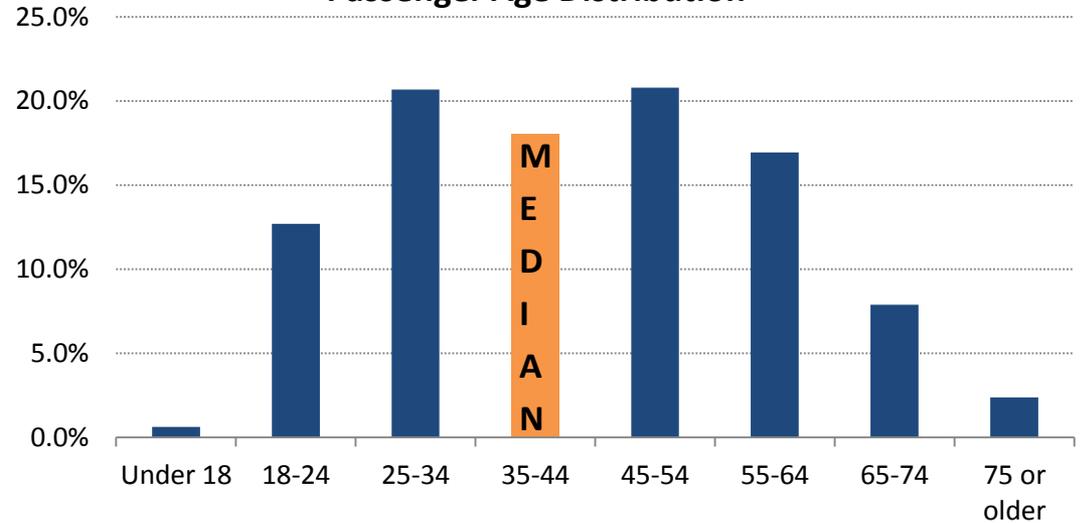


* = includes regional partner airlines

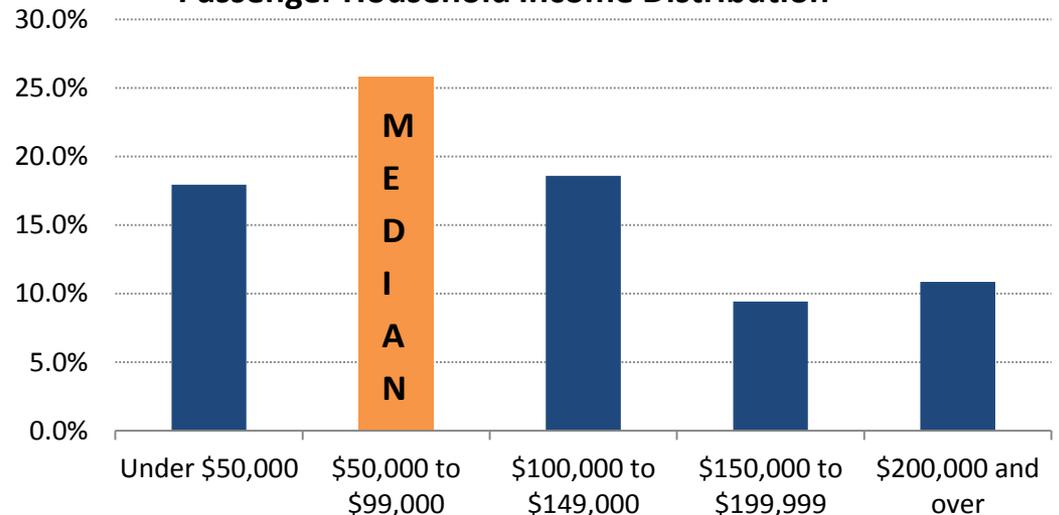
Passenger Demographics

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

Passenger Age Distribution



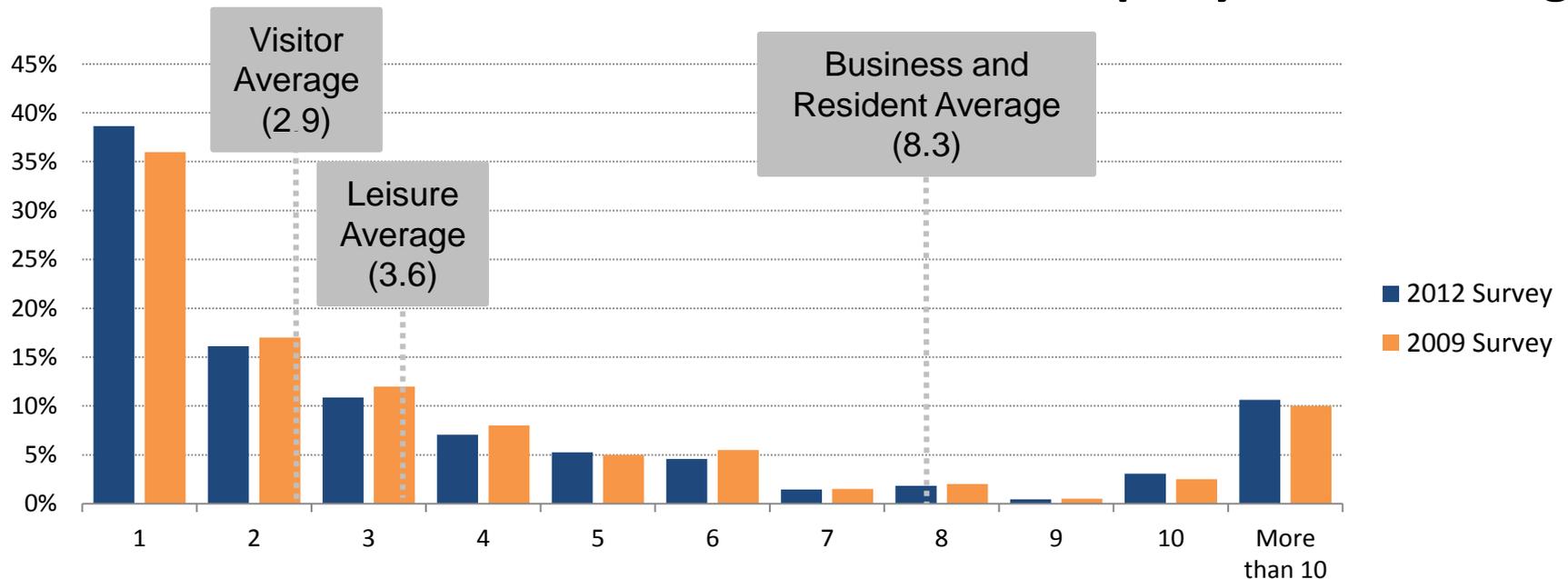
Passenger Household Income Distribution*



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

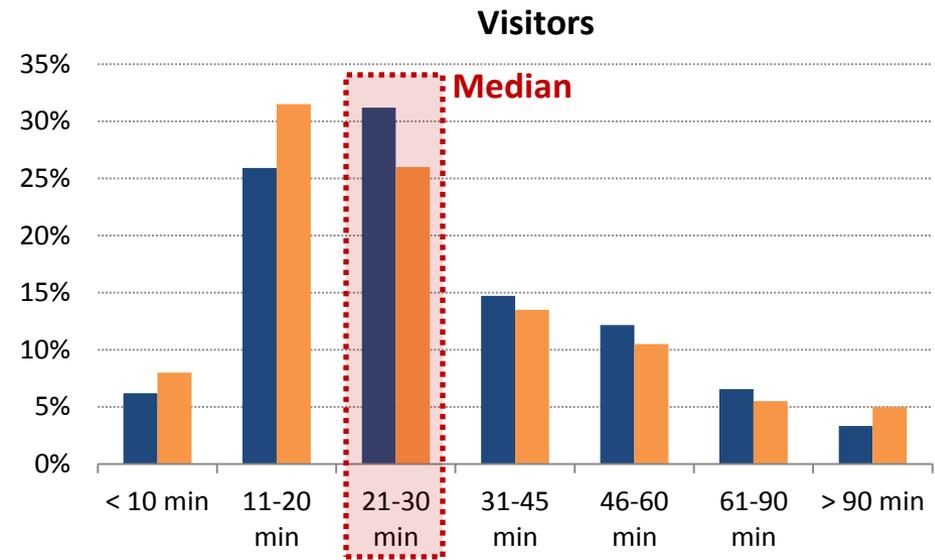
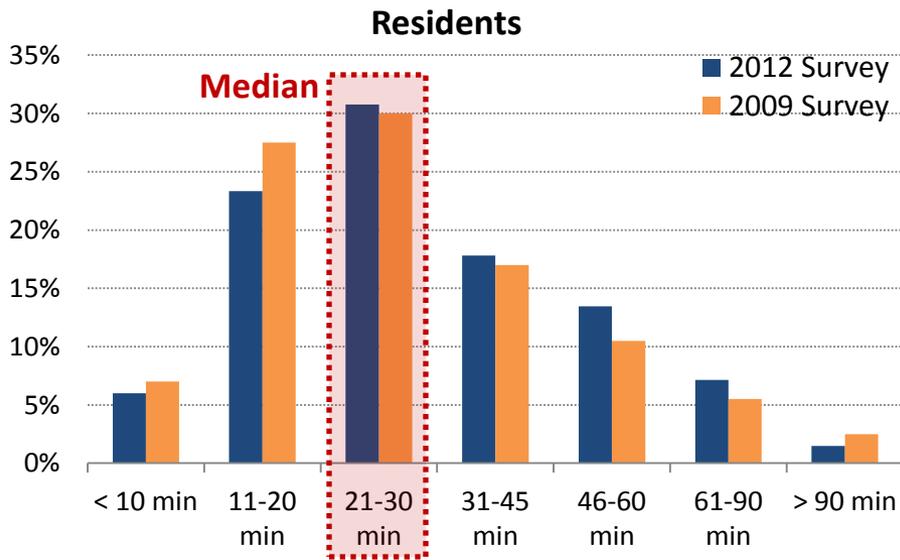
Propensity to Travel out of SDIA

- On average, passengers had flown out of SDIA 5.3 times in the last 12 months
- San Diego residents and business travelers averaged more than 8 trips per year, a slight increase over the 2009 results – residents averaged 7.4 trips and business passengers 7.7
- Visitors travel out of SDIA less than 3 times per year on average



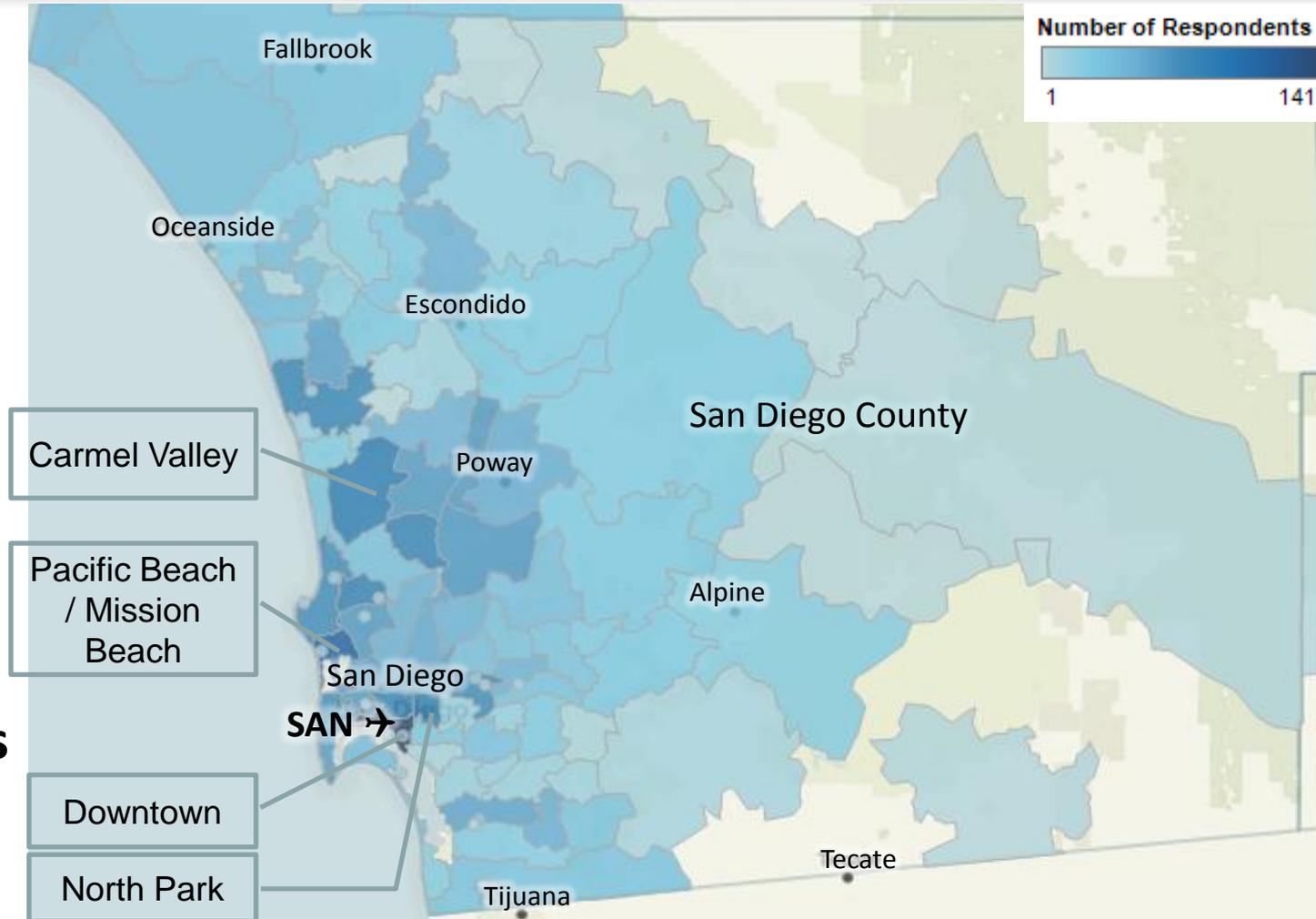
Travel time to SDIA

- More than 60% of O&D passengers began their trip from a location situated 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

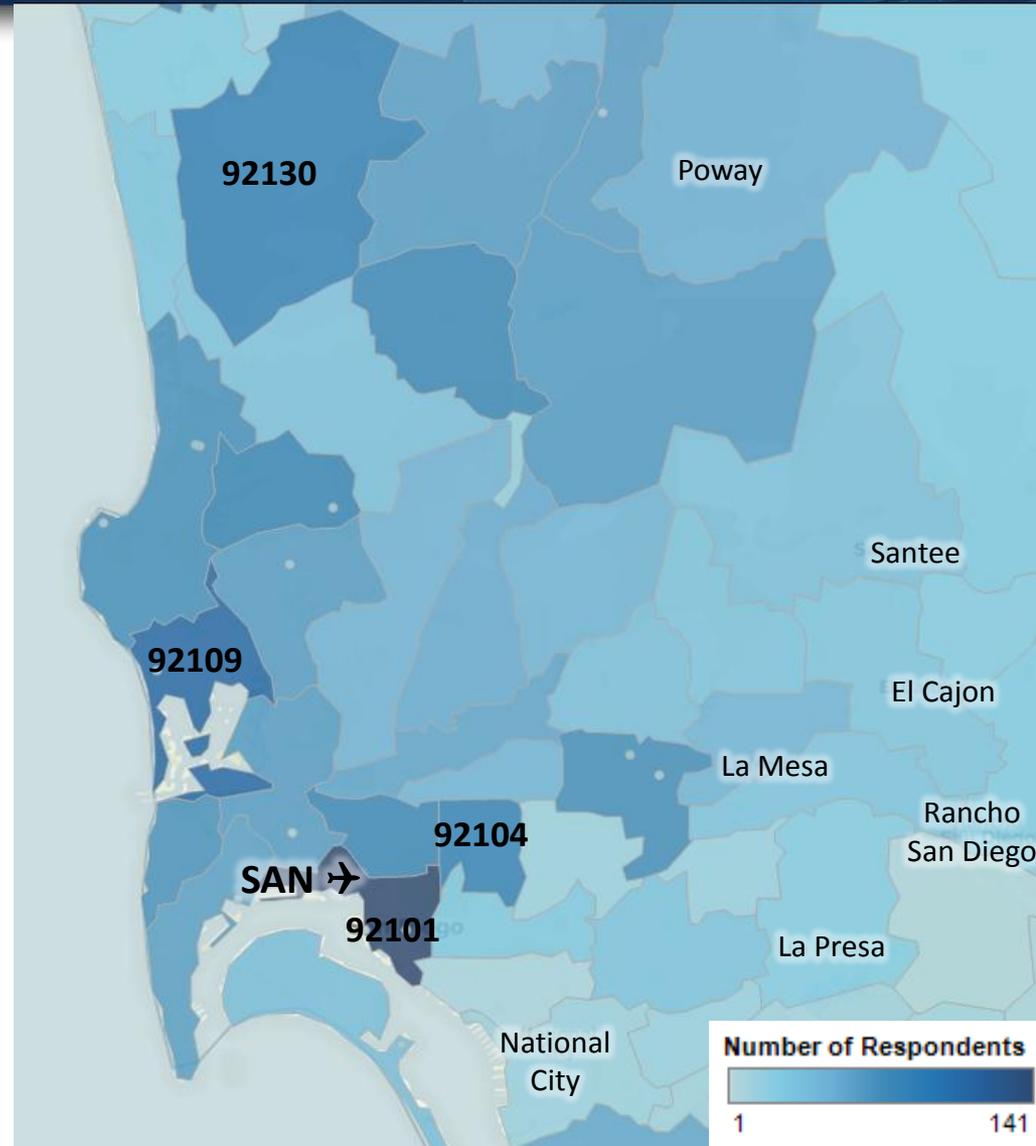
- Resident trip origins are widely dispersed in San Diego County and Southern California
- Four zip codes had more than 80 respondents or 2.4% of all residents surveyed



Number of Respondents by Zip Code

Local Passenger Trip Origin-Residents

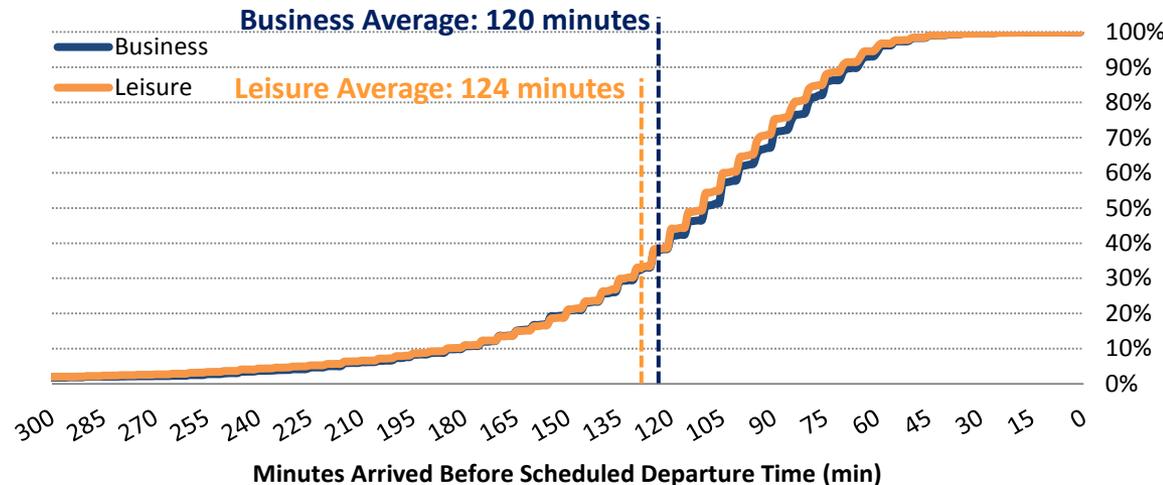
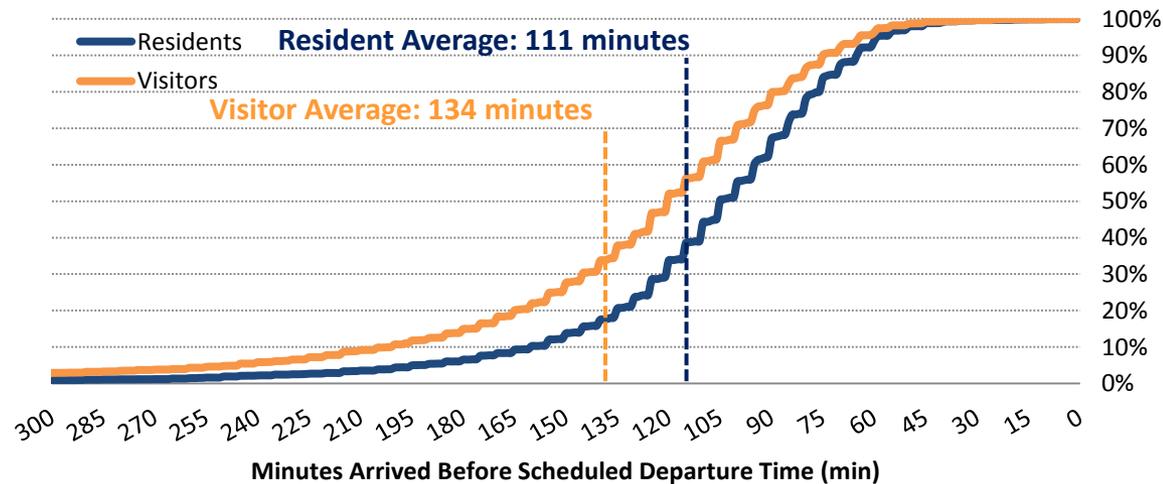
- 4.2% of all residents surveyed originated their trip from downtown (92101), which immediately surrounds the Airport
- 5.6% of all residents surveyed started their trip from either Pacific Beach/Mission Beach or North Park (92109 and 92104)



Passenger Dwell Time

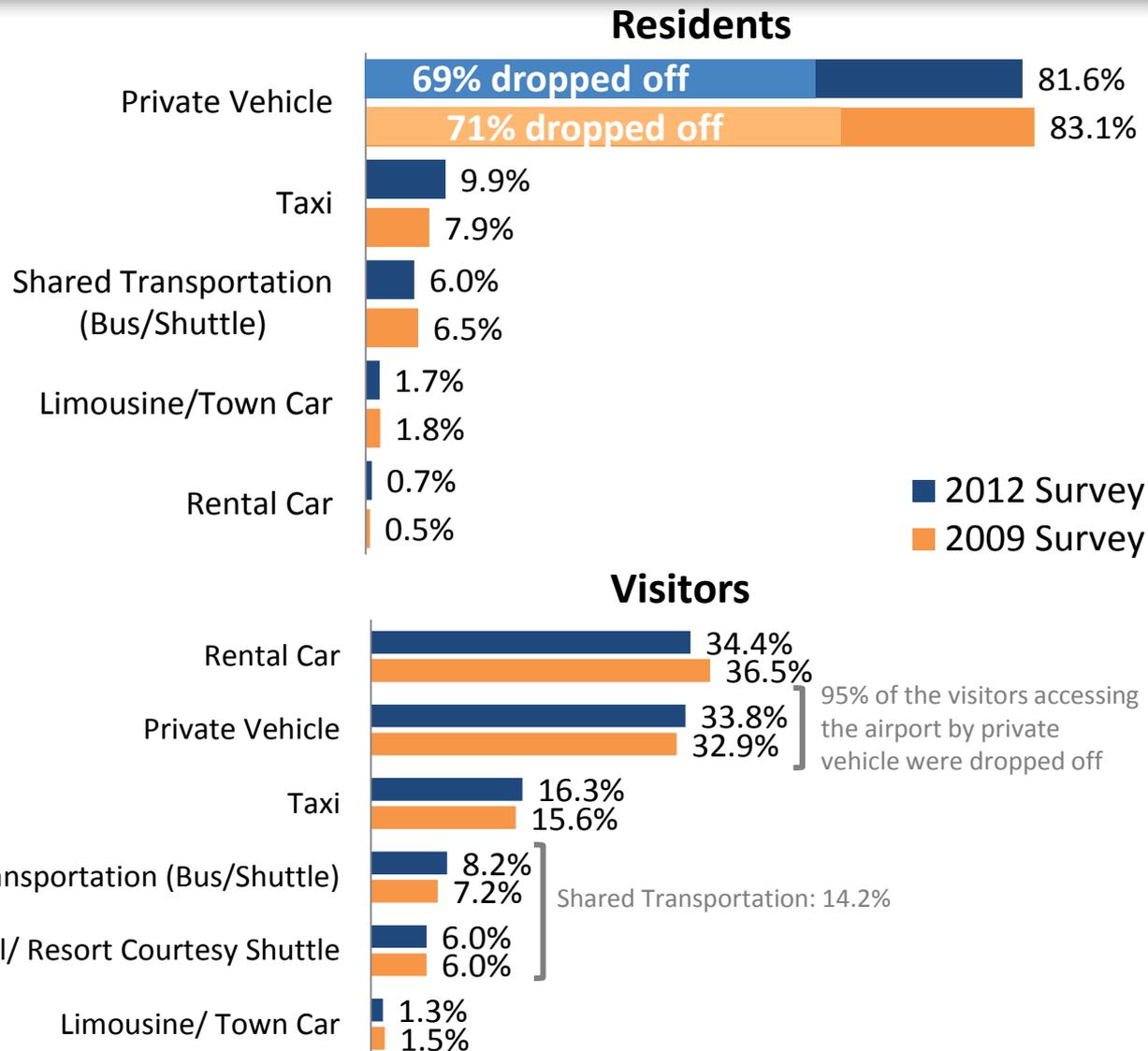
- Passengers typically arrive at SDIA around 2 hours prior to scheduled flight departure time
- Dwell times increased by 10 minutes since 2009
- San Diego residents and business travelers allow for less dwell time at the Airport due to travel frequency or familiarity with SDIA

Departing Passenger Time of Arrival at SDIA
Relative to Scheduled Flight Departure Time



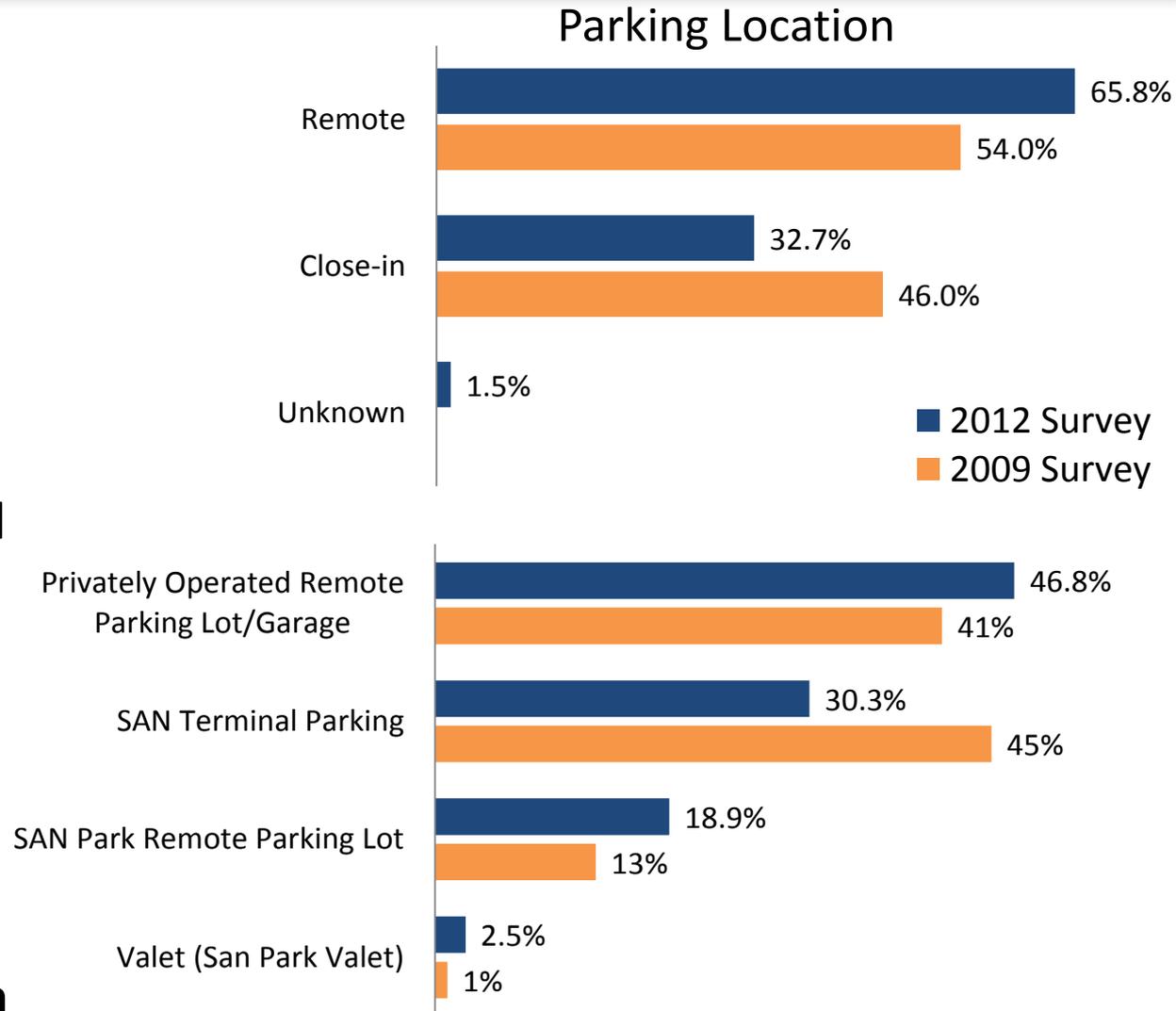
Ground Access: Residents vs. Visitors

- Residents primarily use private vehicles to access SDIA and tend to increasingly rely on taxicabs
- 14% of visitors use shared transportation options to access the Airport including shared ride vans and MTS buses



Airport Parking Location

- **12% of all O&D passengers chose to park, vs. 14% in 2009**
- **Privately operated parking lots captured 47% of the market**
- **87% of passengers parked in their preferred facility**
- **Increase in remote and off-airport parkers may be due to the lesser availability of close-in parking during to the Green Build construction**

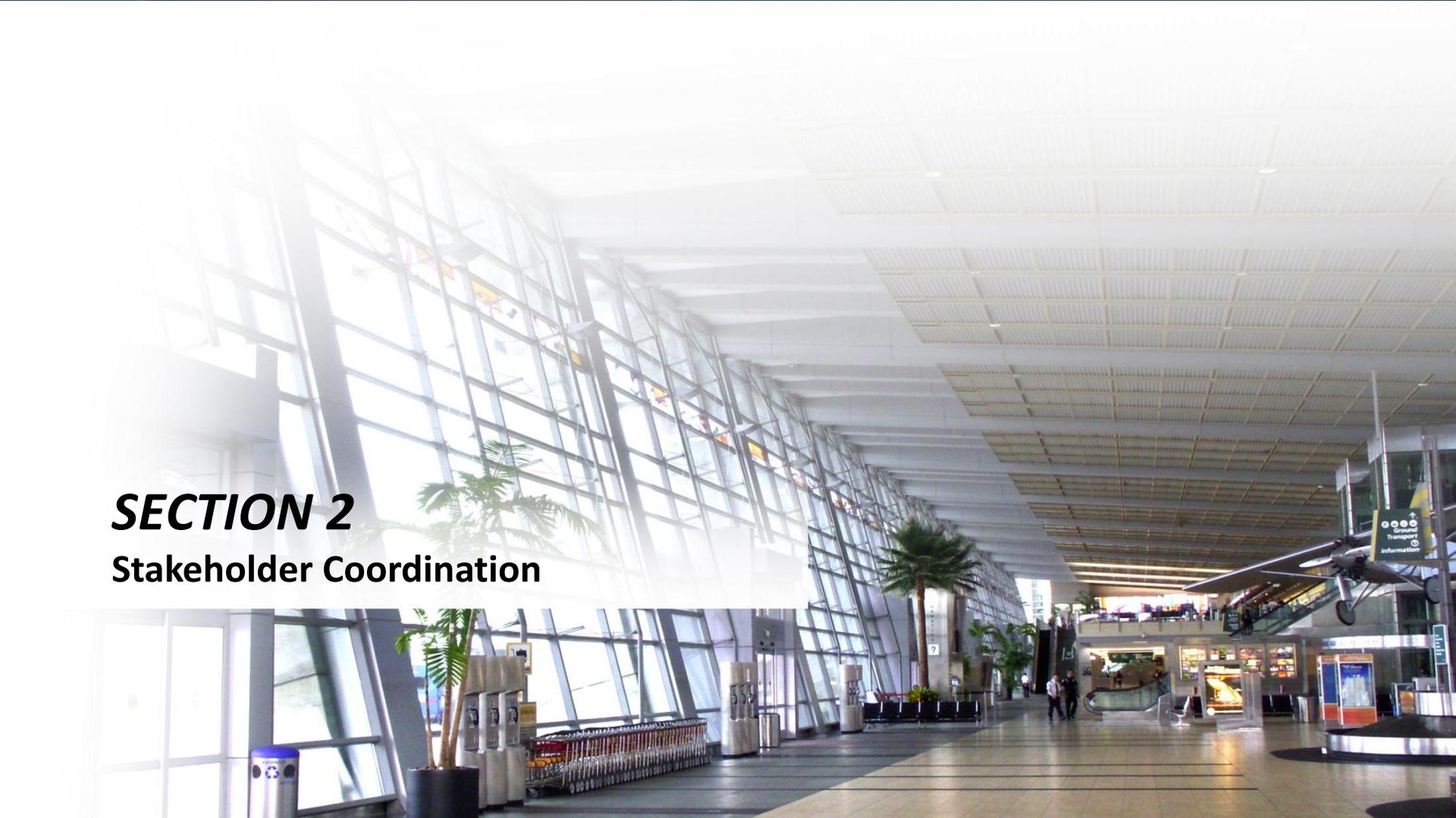


Passenger Concession Spending Characteristics

- Passengers spent an average of \$4.60 on food and beverage items and \$1.30 on magazines, gifts, and other services
- 61% of passengers purchase food and beverages items while only 15% purchase magazines, gifts or other services
- Residents tend to spend less than visitors on average and business passengers less than leisure passengers

	Overall	Residents	Visitors	Business	Leisure
% of solo travelers	62%	67%	57%	77%	54%
Avg. travel party size	1.7	1.5	1.8	1.5	1.8
% of parties spending on food and beverages	61%	57%	64%	60%	61%
Avg. spending on food and beverages per passengers	4.6	4.1	4.8	4.8	4.4
% of parties purchasing magazines, gifts or other services	15%	13%	17%	13%	17%
Avg. spending on magazines, gifts or other services per passenger	1.3	0.9	1.6	1.3	1.3





SECTION 2 **Stakeholder Coordination**



Stakeholder Coordination

■ External stakeholders:

- **One-on-one briefings with key stakeholders:** Over 40 briefings provided
- **Advisory Authority Committee:** Meeting on a quarterly basis. Four meetings to date
- **Technical Advisory Committee:** Meeting on a quarterly basis. Three meetings to date
- **Public meeting:** Three open houses held in October 2012

■ Internal stakeholders:

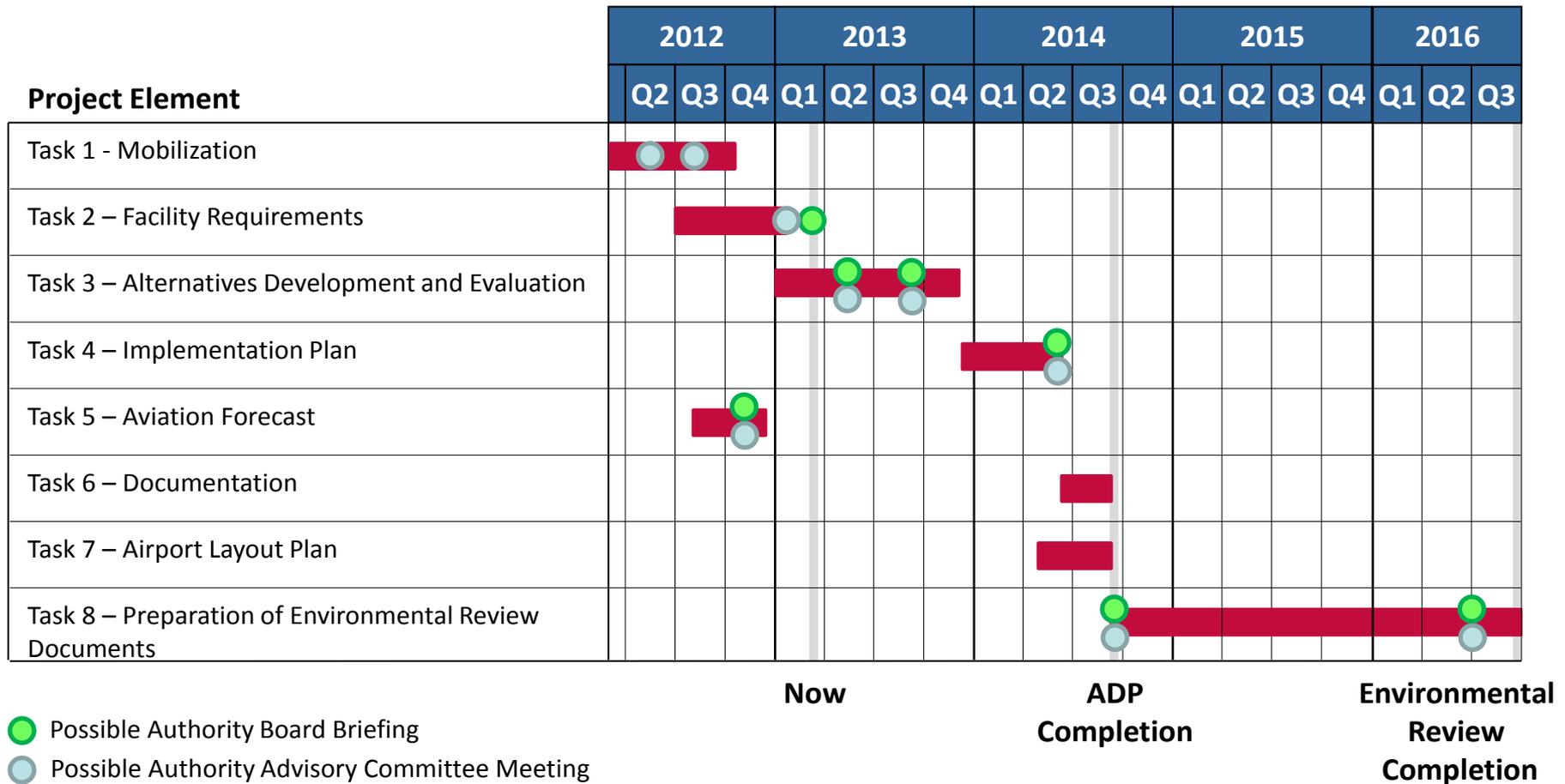
- **Internal one-on-one meetings:** 25 meetings held
- **Internal open house:** First open house held in February 2013

■ Created a dedicated email address adp@san.org

■ Developed a Frequently Asked Questions and web page on san.org



Next Steps



THANK YOU

