



2011 Annual SAN Passenger Satisfaction Survey Results

- Outbound Passengers
- Baggage Delivery Survey Among Inbound Passengers

April 12, 2012 Board Meeting

Prepared by:
Phoenix Marketing International
1 Executive Drive, Suite 270
Somerset, NJ 08873
(732) 563-8503



Travel, Leisure and
Entertainment Practice

Methodology

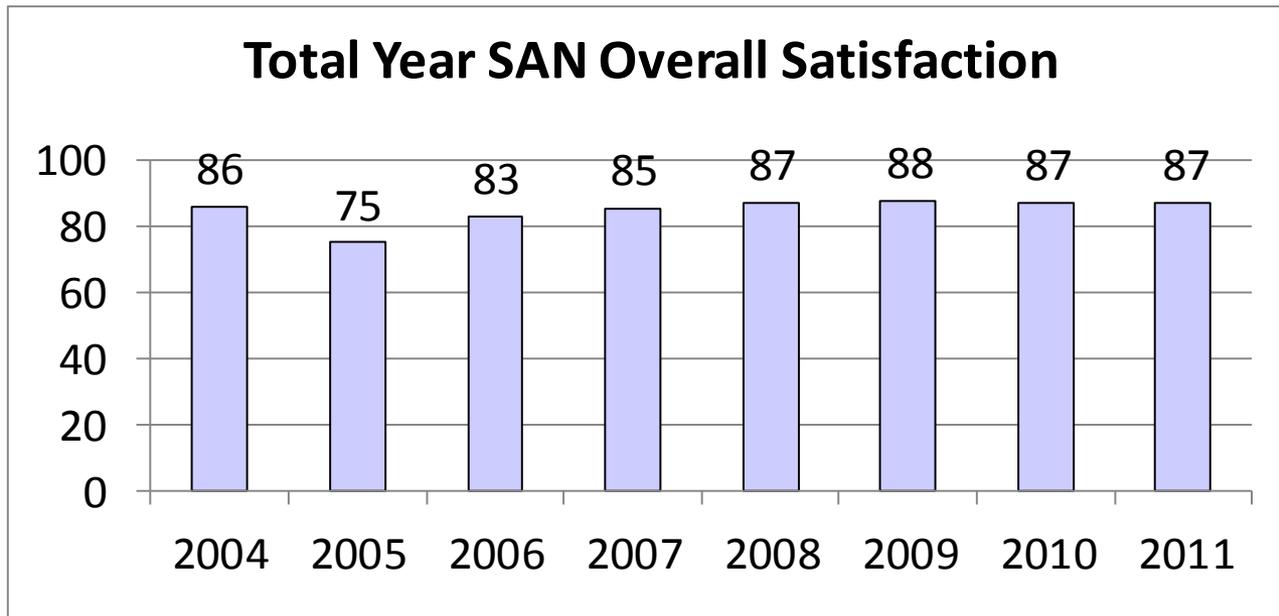
- ➔ A total of 800 SAN passengers were interviewed in 2011 providing a 95% confidence level with an error margin of + 3.5%. Two hundred interviews were conducted every quarter.
- ➔ Each interview was conducted “face-to-face” with a specific interviewer conducting every survey
- ➔ Only departing passengers 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.

A Word About Significant Differences and Seasonality

- In general, a few points difference between scores is almost never significant.
- Smaller sample sizes (e.g., the sample sizes for each individual terminal) will lead to wider variation in quarterly scores.
- Indications of Significant Differences (boxed scores) refer to 2010 versus 2011.

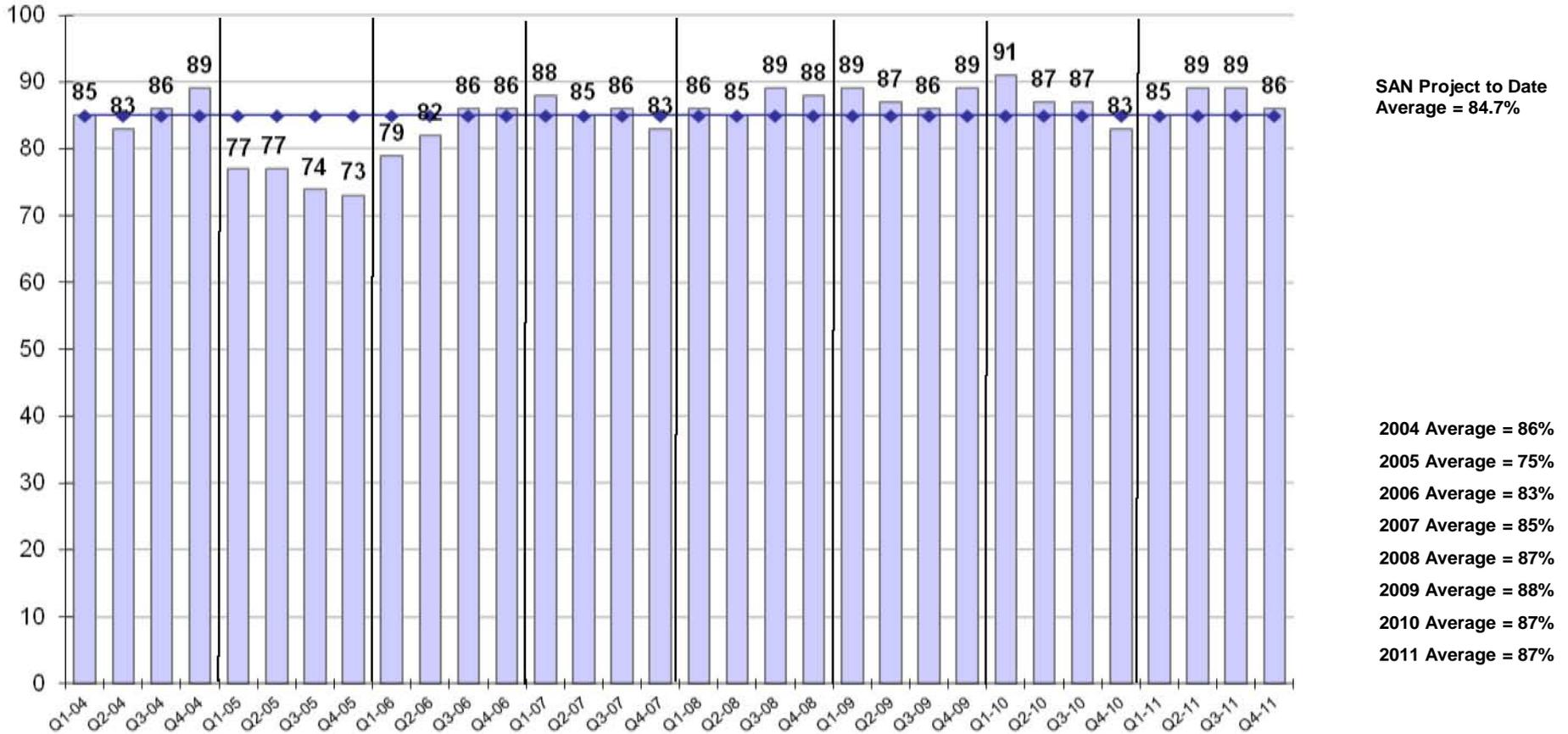
Executive Summary

- ➔ Overall, 87% of respondents in 2011 rate Overall Satisfaction highly at SAN.



Executive Summary

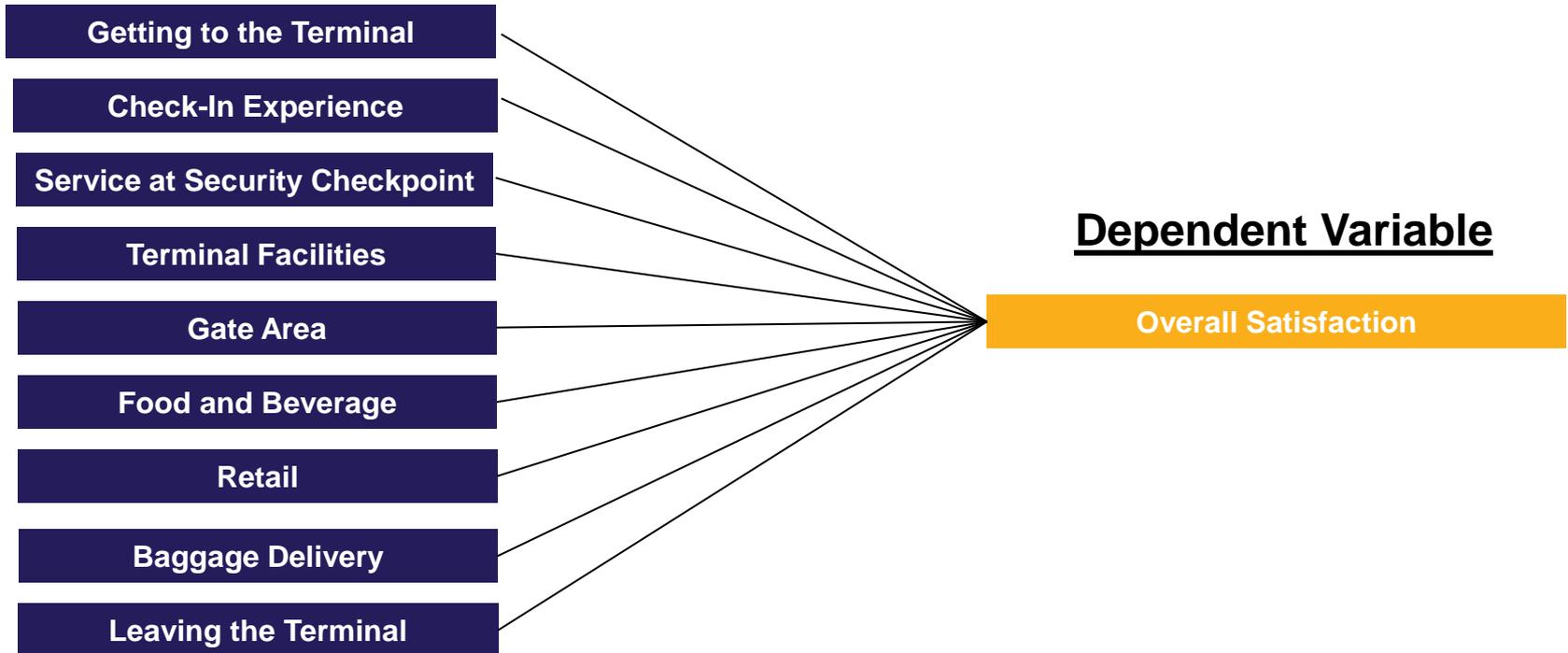
➔ Overall Satisfaction at SAN eight year average is 84.7%.



* The SAN average from 2004 – 2010 had been 84.4%

Determining Factor Importance

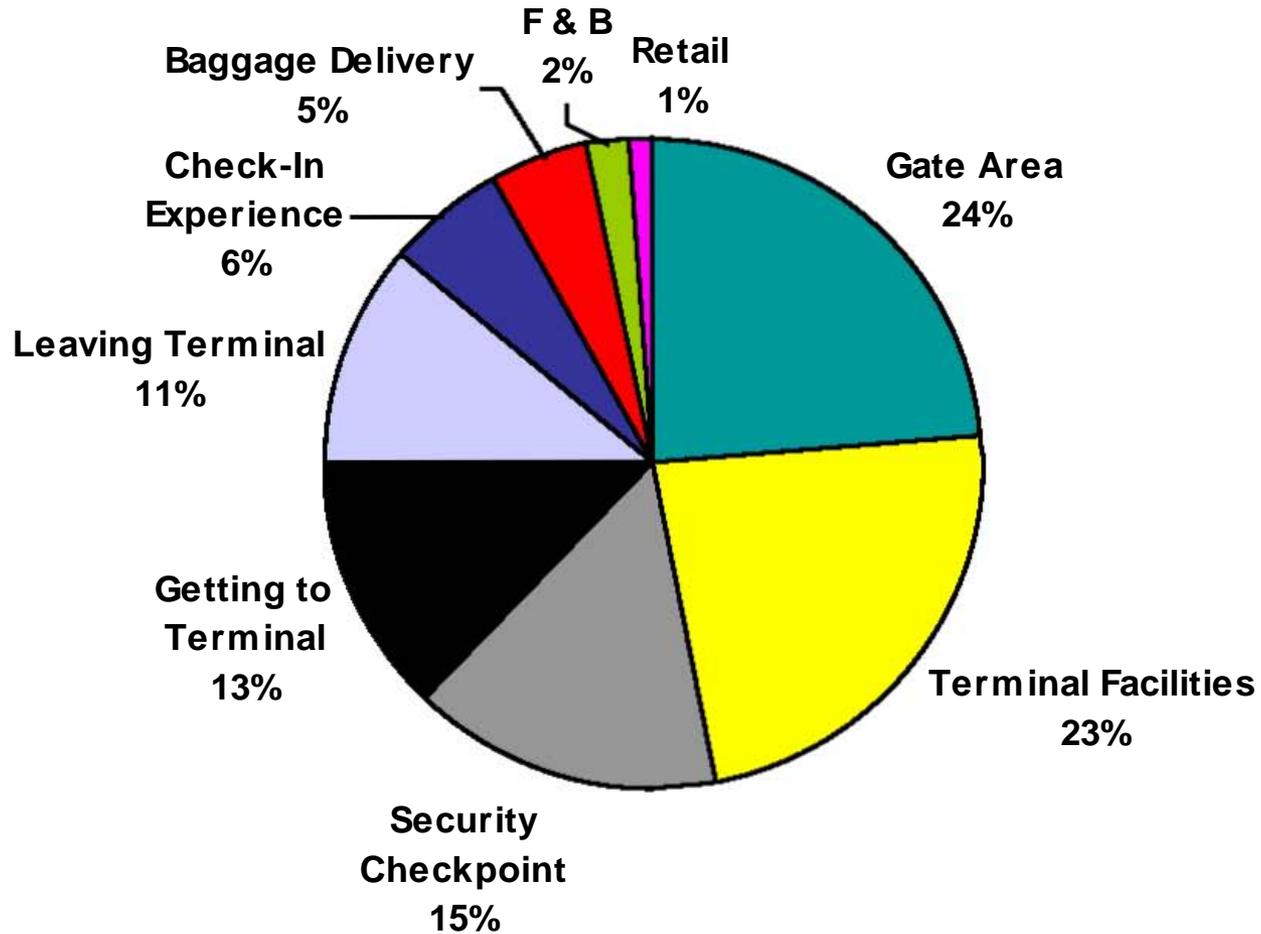
Independent Variables



- Satisfaction with various parts of the airport experience (independent variables) “drive” performance on Overall Satisfaction (dependent variable).
- Regression analysis quantifies the impact of each independent variable on the dependent variable.
- Results are “weighted” according to terminal traffic percentages.

Passenger Priorities at SAN

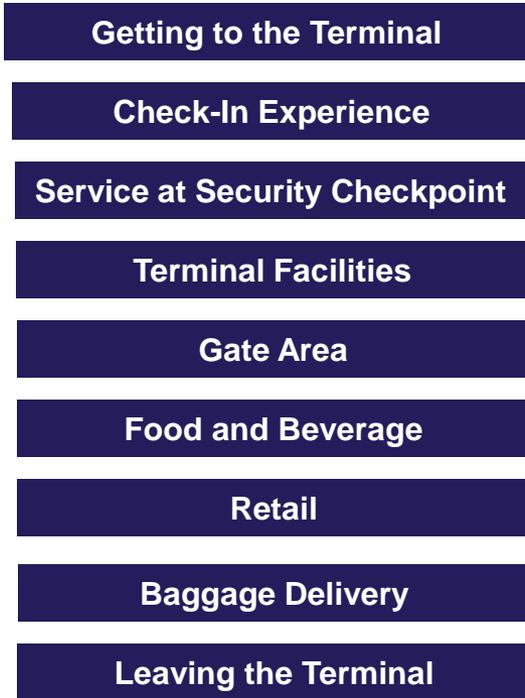
Passenger Priorities
% Impact On Overall Satisfaction



Source: Total 2011 Survey Results SAN, Weighted to Terminal Volumes, N=800



Independent Variables



Dependent Variable

Overall Satisfaction

Top Drivers of Satisfaction at SAN by Category

- Gate Area
- Terminal Facilities
- Service at Security Checkpoint

The Overall Score for “Gate Area” Increases Significantly in 2011 while “Service at the Security Checkpoint” Decreases.

2004-2011 Total Year

	2004	2005	2006	2007	2008	2009	2010	2011
Gate Area Overall	84%	83%	87%	85%	84%	84%	86%	90%
Check-In Experience Overall	95%	82%	89%	85%	89%	87%	90%	89%
Terminal Facilities Overall	82%	71%	78%	83%	87%	88%	86%	86%
Service at the Security Checkpoint Overall	84%	79%	84%	82%	85%	90%	90%	85%
Retail Services Overall	60%	50%	66%	69%	69%	73%	80%	81%
Food and Beverage Overall	57%	53%	61%	62%	67%	72%	78%	81%
Baggage Delivery Overall	67%	60%	72%	76%	80%	80%	79%	80%
Leaving the Terminal Overall	82%	67%	70%	70%	75%	79%	78%	79%
Getting to the Terminal Overall	89%	77%	78%	77%	81%	76%	72%	75%
Overall Satisfaction with SAN	86%	75%	83%	85%	87%	88%	87%	87%

 Boxed numbers represent significant statistical differences from 2010 data at a 95% confidence interval.  Green boxes indicate % is significantly higher and  red boxes indicate % is significantly lower.

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”.

Terminal 1 Overall Satisfaction Lags Behind the Other Terminals

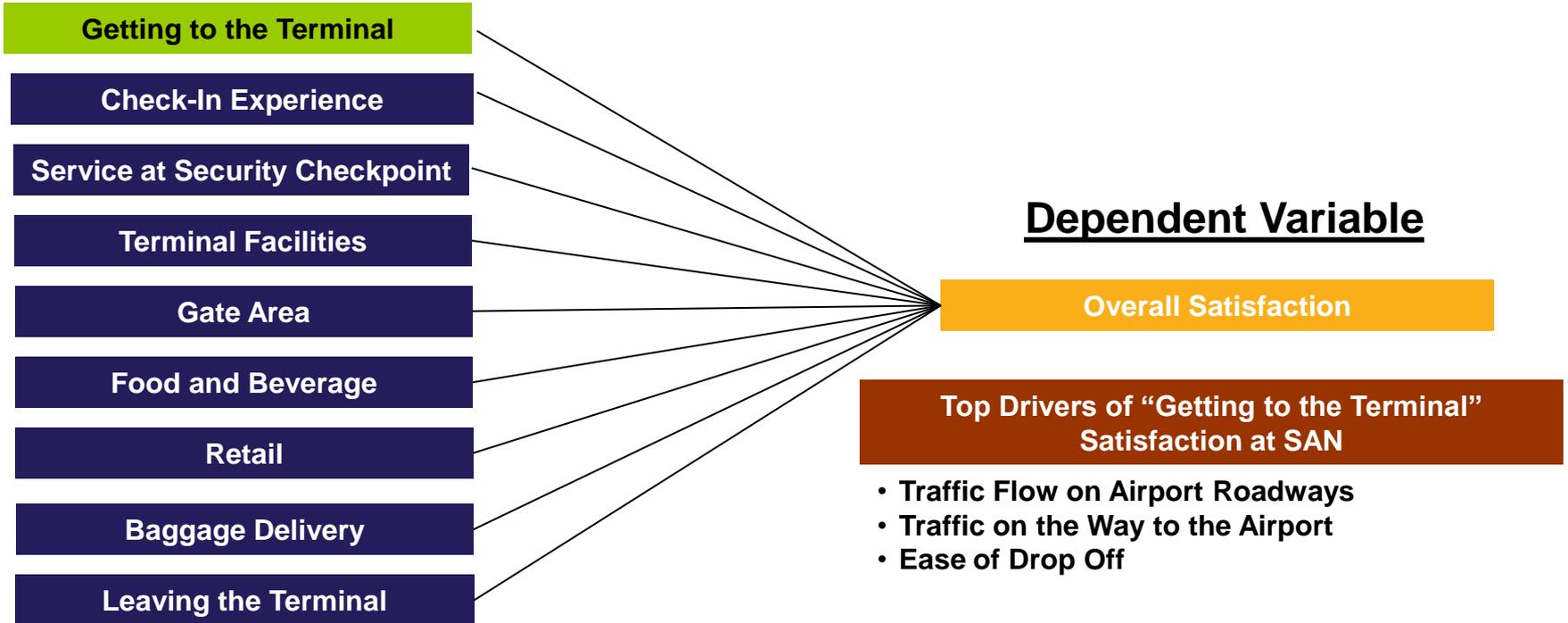
SAN Overall Total 2011

	SAN 2011	Terminal 1	Terminal 2	Commuter Terminal
Gate Area Overall	90%	90%	90%	96%
Check-In Experience Overall	89%	87%	91%	92%
Terminal Facilities Overall	86%	87%	85%	97%
Service at the Security Checkpoint Overall	85%	84%	85%	97%
Retail Services Overall	81%	80%	83%	79%
Food and Beverage Overall	81%	81%	83%	71%
Baggage Delivery Overall	80%	77%	83%	85%
Leaving the Terminal Overall	79%	80%	78%	82%
Getting to the Terminal Overall	75%	75%	75%	82%
Overall Satisfaction with SAN	87%	85%	89%	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".

Independent Variables



Satisfaction with Getting to the Terminal Overall Scores Highest in the Commuter Terminal

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

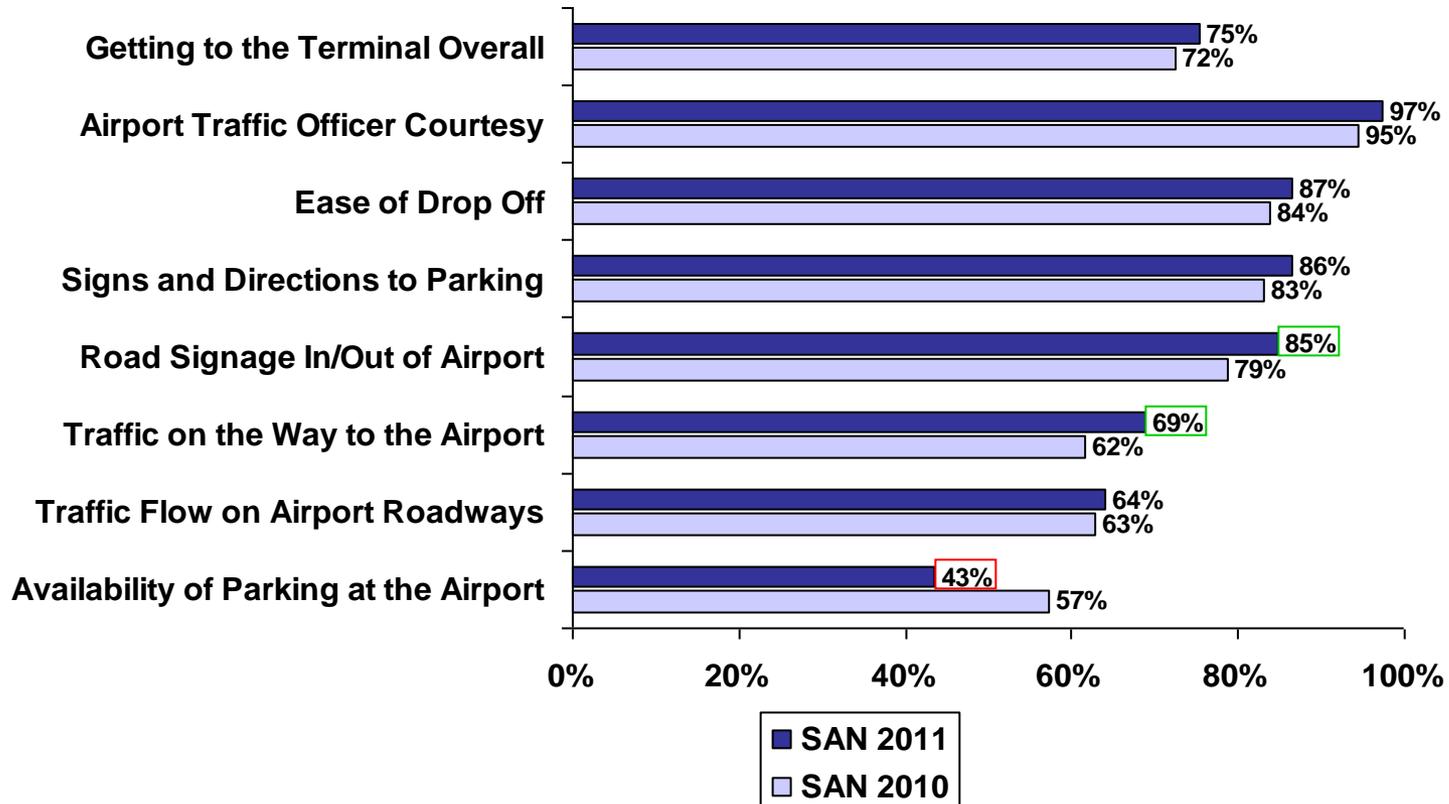
	SAN 2011	Terminal 1	Terminal 2	Commuter Terminal
Airport Traffic Officer Courtesy	97%	96%	99%	97%
Ease of Drop Off	87%	88%	85%	90%
Signs and Directions to Parking	86%	86%	87%	88%
Road Signage In/Out of Airport	85%	83%	88%	85%
Traffic on the Way to the Airport	69%	69%	69%	67%
Traffic Flow on Airport Roadways	64%	62%	65%	77%
Availability of Parking at the Airport	43%	40%	47%	54%
Getting to the Terminal Overall	75%	75%	75%	82%

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).



Satisfaction with “Road Signage In/Out of Airport” and “Traffic on the Way to the Airport” Increases Significantly while “Availability of Parking at the Airport” Decreases in 2011

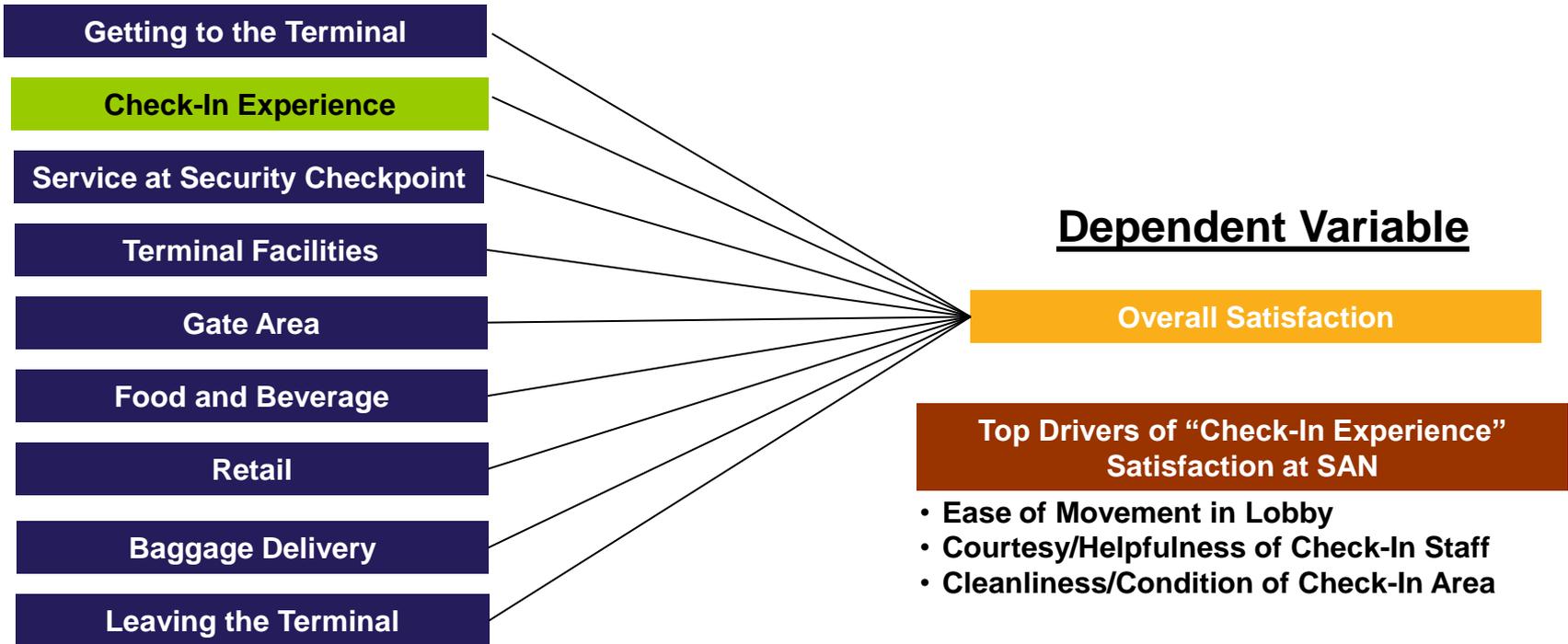
Top Two Box Percentages – 2010 Versus 2011 – SAN Total



Boxed numbers represent significant statistical differences from 2010 data at a 95% confidence interval. Green boxes indicate % is significantly higher and red boxes indicate % is significantly lower.

Percent responding Top Two Box, i.e., rating the airport a “4” or “5” on a five-point scale.

Independent Variables



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

SAN Total 2011

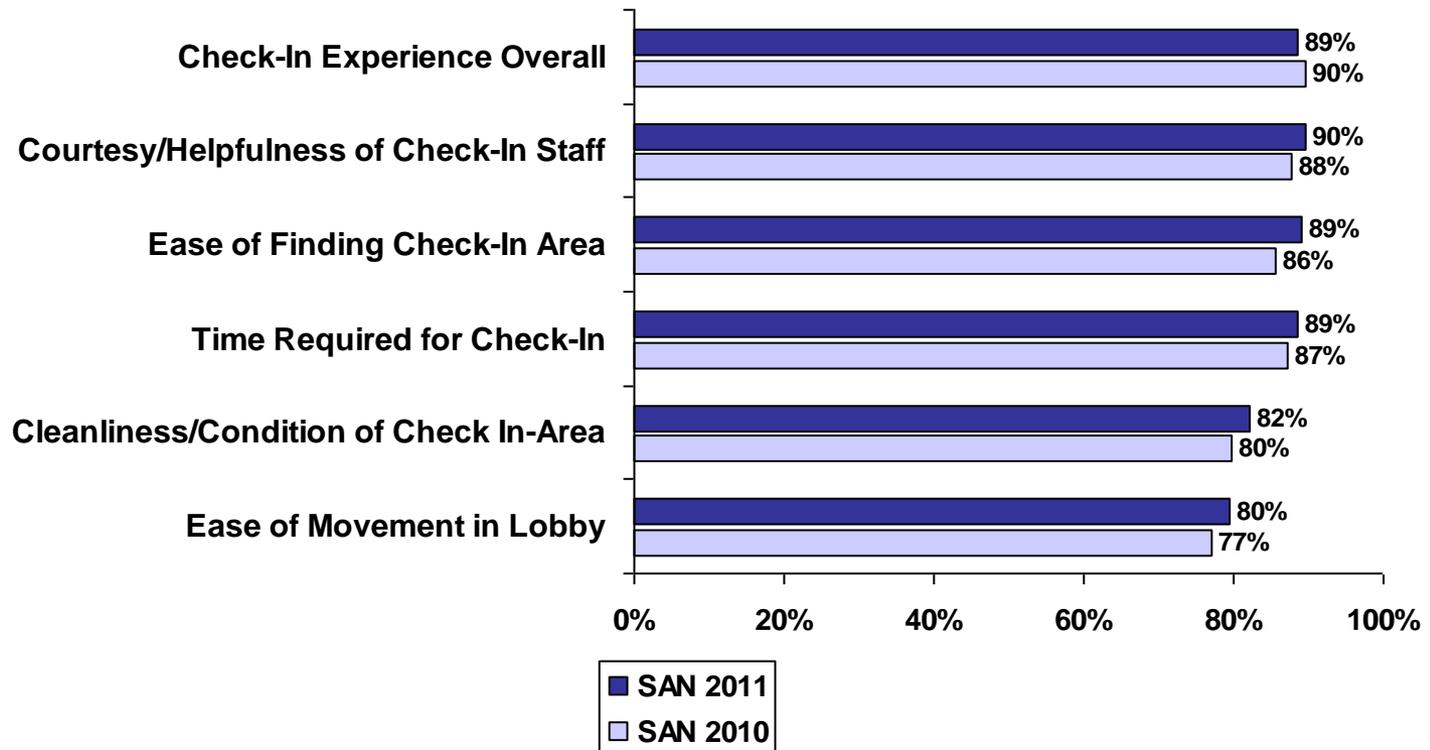
	SAN 2011	Terminal 1	Terminal 2	Commuter Terminal
Courtesy/Helpfulness of Check-In Staff	90%	88%	91%	94%
Ease of Finding Check-In Area	89%	95%	82%	78%
Time Required for Check-In	89%	85%	93%	95%
Cleanliness/Condition of Check-In Area	82%	79%	85%	96%
Ease of Movement in Lobby	80%	73%	88%	93%
Check-In Experience Overall	89%	87%	91%	92%

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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".

There are No Significant Differences in Overall Scores for Check-In Experience

Top Two Box Percentages – 2010 Versus 2011 – SAN Total



Percent responding Top Two Box, i.e., rating the airport a "4" or "5" on a five-point scale.

Independent Variables



Dependent Variable

Overall Satisfaction

Top Drivers of “Service at Security Checkpoint” Satisfaction at SAN

- Comfort/Design of Area
- Professionalism of Staff
- Time Required

Satisfaction with Terminal 1 Security Checkpoint Scores Lowest

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

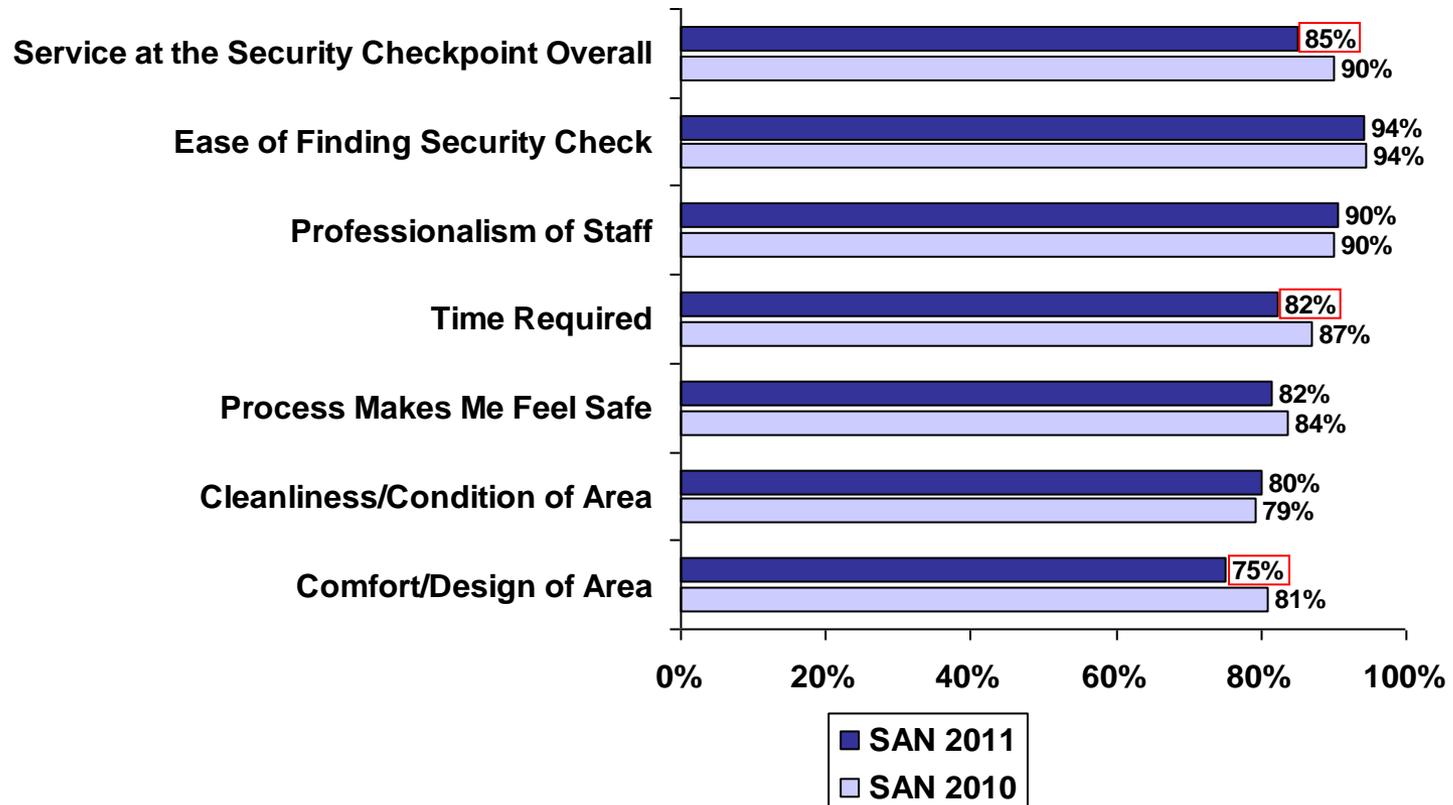
	SAN 2011	Terminal 1	Terminal 2	Commuter Terminal
Ease of Finding Security Check	94%	96%	92%	90%
Professionalism of Staff	90%	88%	93%	98%
Time Required	82%	82%	81%	98%
Process Makes Me Feel Safe	82%	81%	82%	88%
Cleanliness/Condition of Area	80%	77%	82%	94%
Comfort/Design of Area	75%	73%	76%	93%
Service at the Security Checkpoint Overall	85%	84%	85%	97%

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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".

Satisfaction with “Overall Service at the Security Checkpoint” Decreases Significantly in 2011 as well as in Two Factors Below

Top Two Box Percentages – 2010 Versus 2011 – SAN Total



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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 Times Increases Significantly in 2011

Minutes Waiting – 2010 Versus 2011 – SAN Total

	SAN 2010	SAN 2011
Five minutes or less	46%	26%
Six to 10 minutes	28%	26%
Eleven to 15 minutes	13%	23%
Sixteen to 20 minutes	7%	17%
Twenty one to 25 minutes	3%	5%
More than 25 minutes	2%	4%
Mean Minutes	8.9	12.1

Green boxes indicate % is significantly higher and red boxes indicate % is significantly lower.

Note: Percentages may not add up to 100% due to rounding.



Perceived Terminal 2 Security Wait Times are the Longest

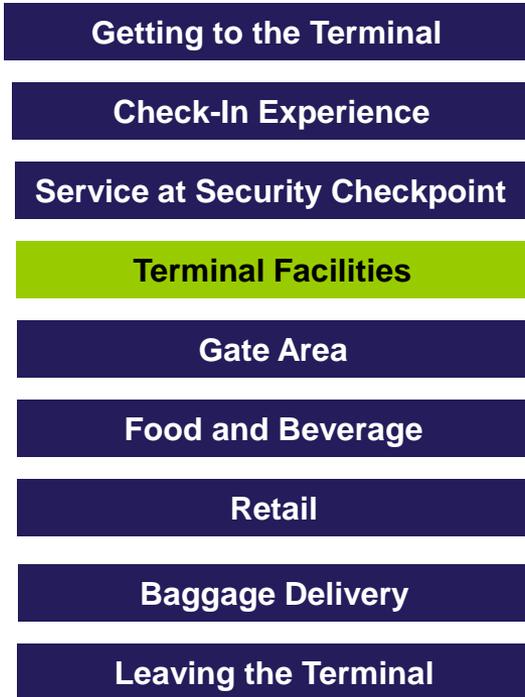
Minutes Waiting – 2011

	SAN	Terminal 1	Terminal 2	Commuter Terminal
Five minutes or less	26%	26%	20%	73%
Six to 10 minutes	26%	23%	30%	21%
Eleven to 15 minutes	23%	24%	25%	4%
Sixteen to 20 minutes	17%	19%	17%	3%
Twenty one to 25 minutes	5%	4%	6%	0%
More than 25 minutes	4%	5%	3%	0%
Mean Minutes	12.1	12.3	12.6	5.4

Note: Percentages may not add up to 100% due to rounding.



Independent Variables



Dependent Variable

Overall Satisfaction

Top Drivers of “Terminal Facilities”
Satisfaction at SAN

- Cleanliness/Condition of Terminal Building
- Availability of Flight Information Displays
- Effectiveness of Signs in Terminal

Satisfaction with Terminal Facilities is Lowest in Terminal 2

Terminal Facilities Top Two Box Percentages – SAN Total 2011

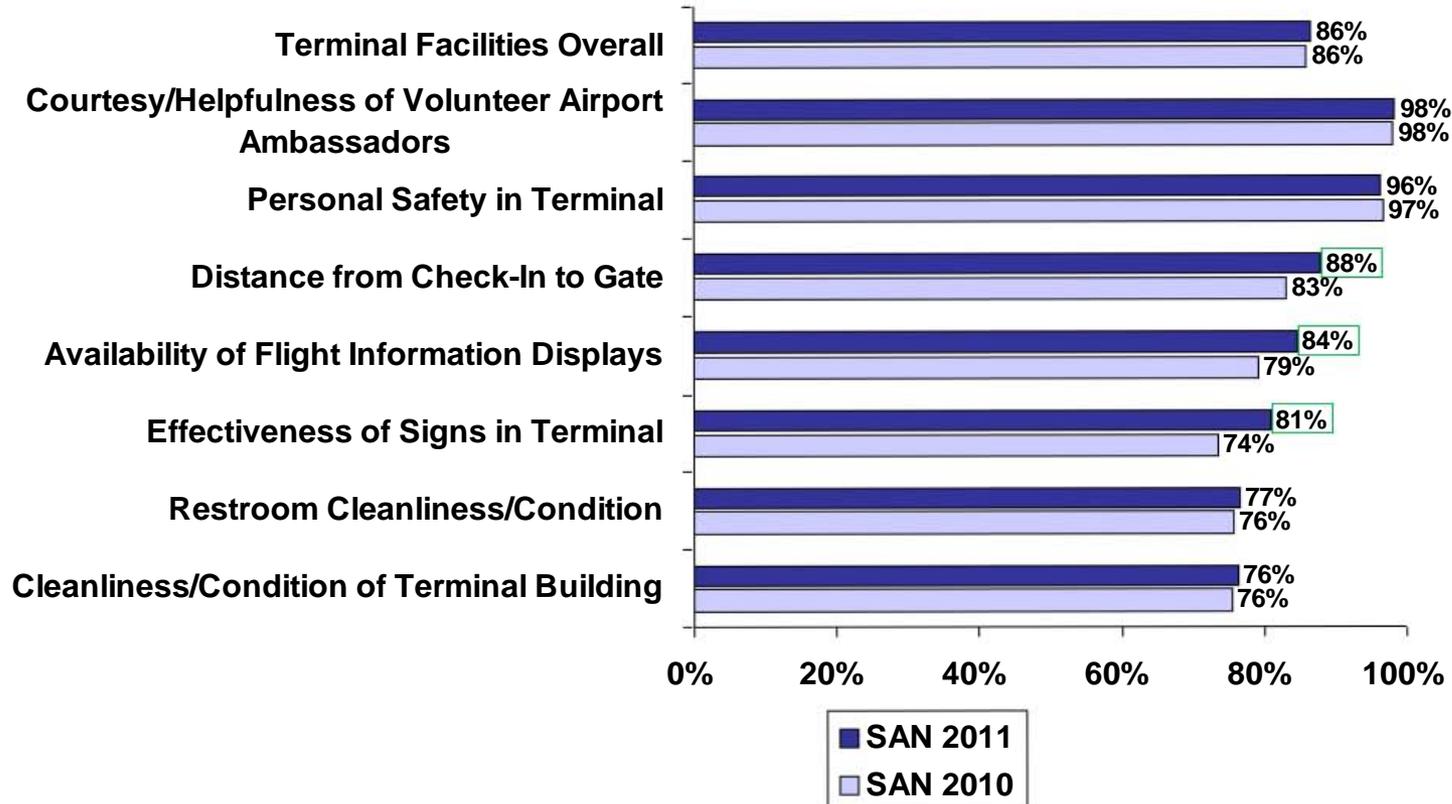
	SAN 2011	Terminal 1	Terminal 2	Commuter Terminal
Courtesy/Helpfulness of Volunteer Airport Ambassadors	98%	98%	98%	99%
Personal Safety in Terminal	96%	96%	96%	98%
Distance from Check-In to Gate	88%	94%	78%	100%
Availability of Flight Information Displays	84%	86%	83%	88%
Effectiveness of Signs in Terminal	81%	82%	79%	83%
Restroom Cleanliness/Condition	77%	74%	79%	85%
Cleanliness/Condition of Terminal Building	76%	72%	81%	85%
Terminal Facilities Overall	86%	87%	85%	97%

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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”.

“Terminal Facilities” Satisfaction Scores Increase Significantly in Three Factors in 2011

Top Two Box Percentages – 2010 Versus 2011 – SAN Total



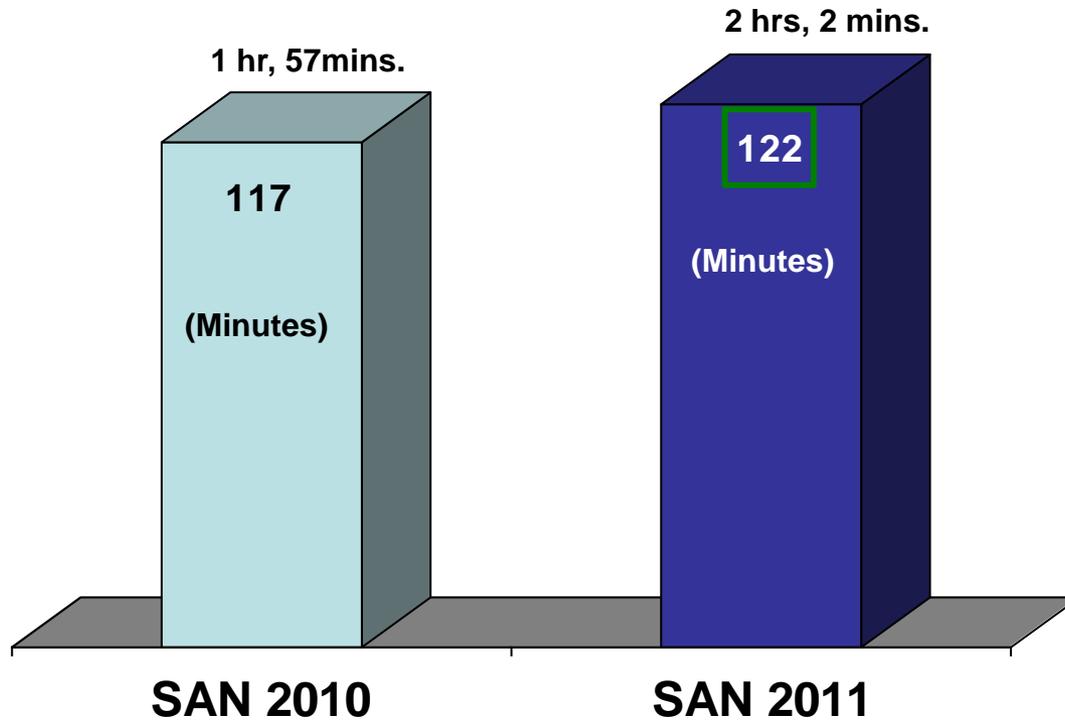
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Percent responding Top Two Box, i.e., rating the airport a “4” or “5” on a five-point scale.

Dwell Times at SAN Increased by Five Minutes in 2011

Minutes Arriving Before Scheduled Departure –2010 Versus 2011 – SAN Total

Average Dwell Times

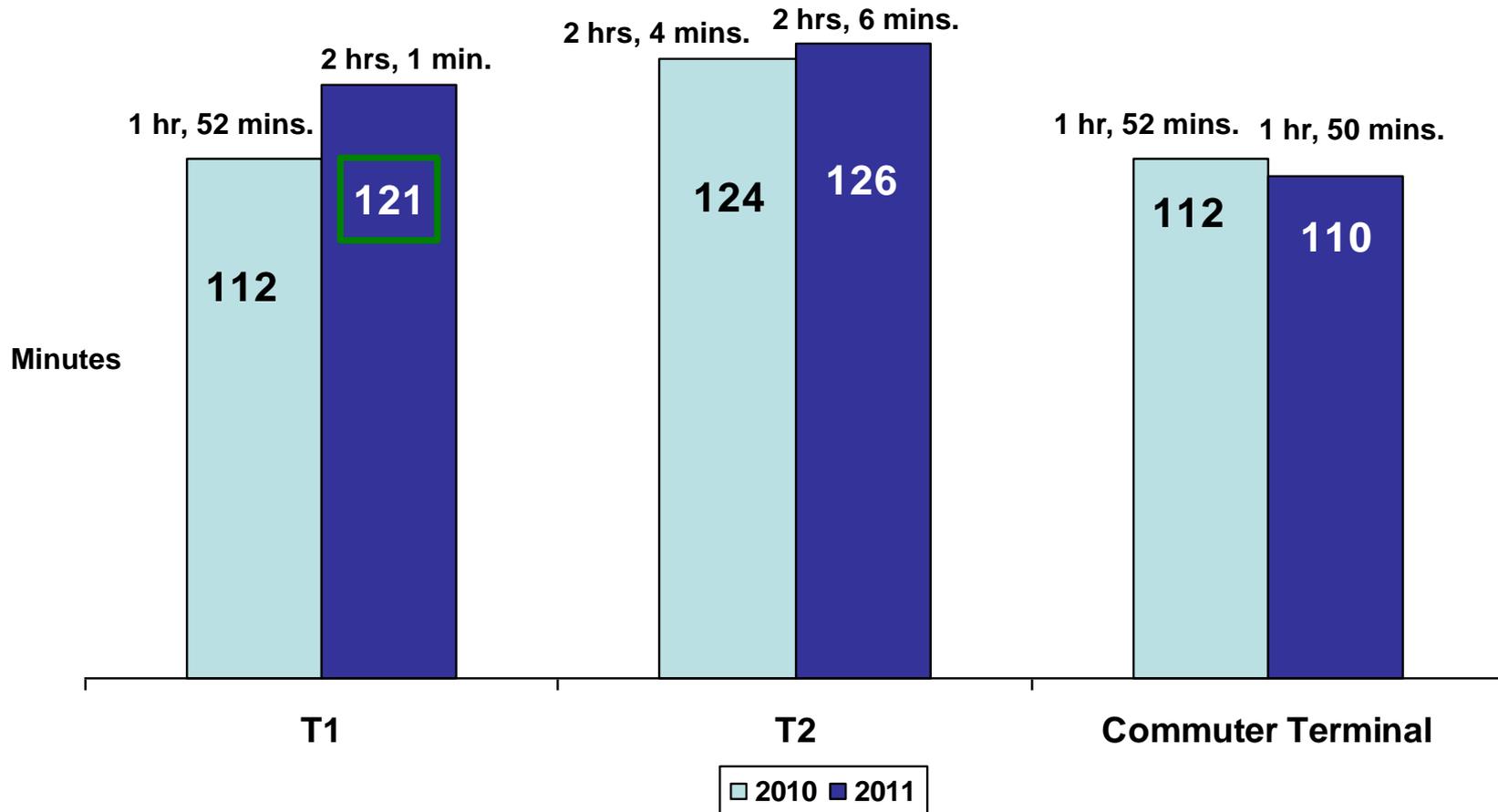


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Green boxes indicate average is significantly higher and red boxes indicate average is significantly lower.

Dwell Times Increase Significantly In Terminal 1

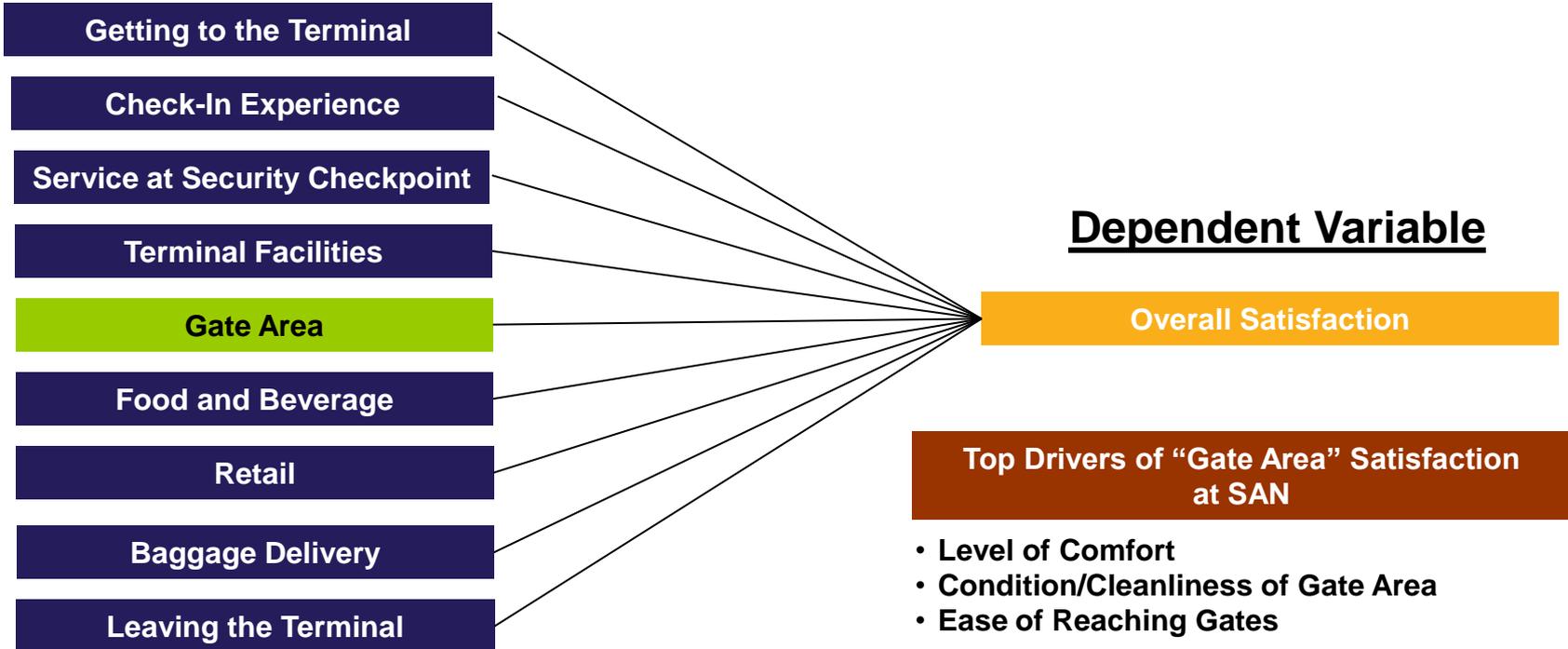
Minutes Arriving Before Scheduled Departure – 2010 Versus 2011

Average Dwell Times



Boxed numbers represent significant statistical differences from 2010 data at a 95% confidence interval. Green boxes indicate average is significantly higher and red boxes indicate average is significantly lower.

Independent Variables



The Commuter Terminal Scored Highest for “Gate Area Overall”

Gate Area Top Two Box Percentages – SAN Total 2011

	SAN 2011	Terminal 1	Terminal 2	Commuter Terminal
Courtesy of Airline Staff	98%	98%	97%	98%
Level of Comfort	88%	88%	88%	91%
Ease of Reaching Gates	87%	86%	88%	95%
Condition/Cleanliness of Gate Area	81%	78%	83%	90%
Concessions Near Gate	80%	79%	82%	79%
Gate Area Overall	90%	90%	90%	96%

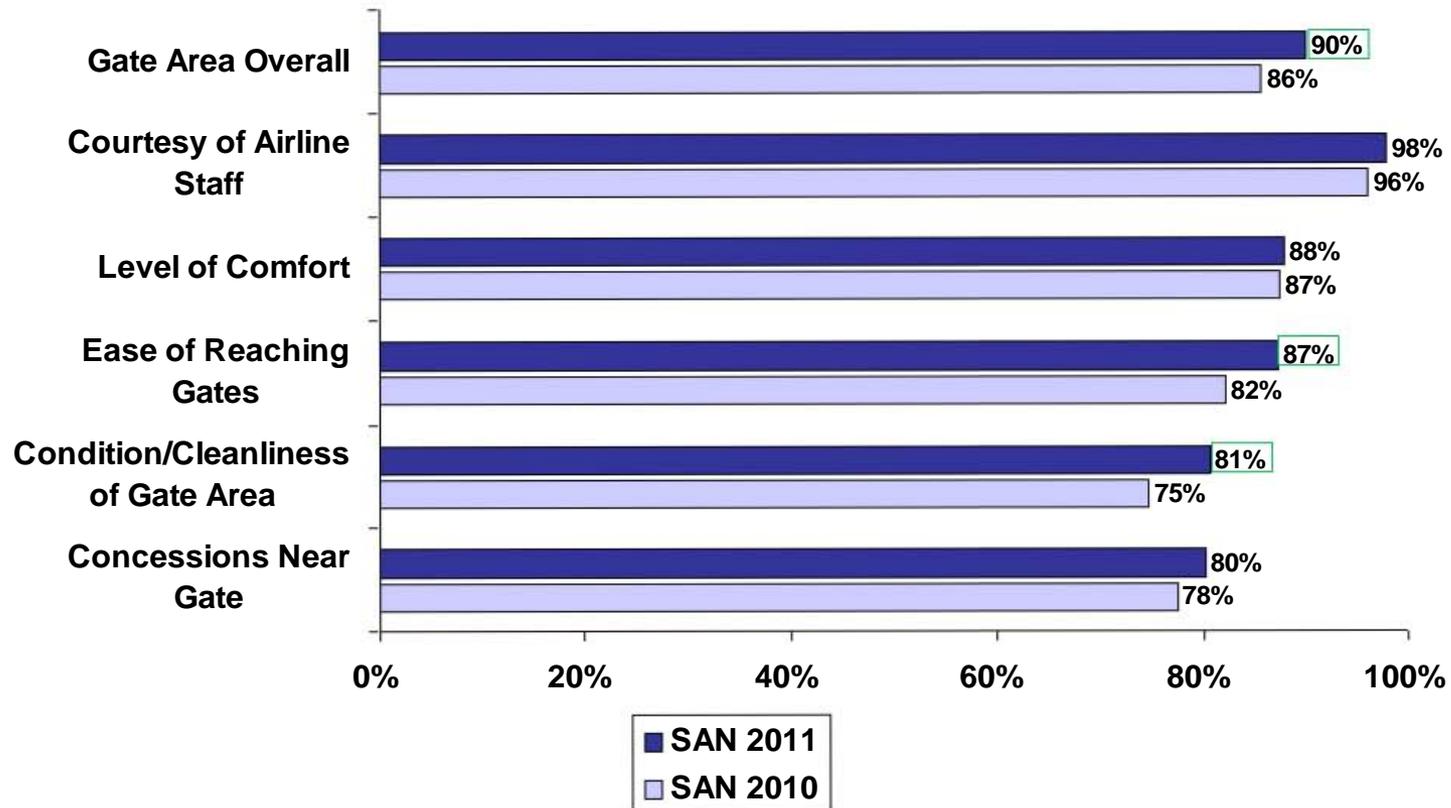
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Percent responding Top Two Box, (i.e., rating the airport a “4” or “5” on a five-point scale). Scale runs from 1 = “Very Dissatisfied” to 5 = “Very Satisfied”.



Satisfaction with “Gate Area Overall” Increases Significantly and in Two Factors

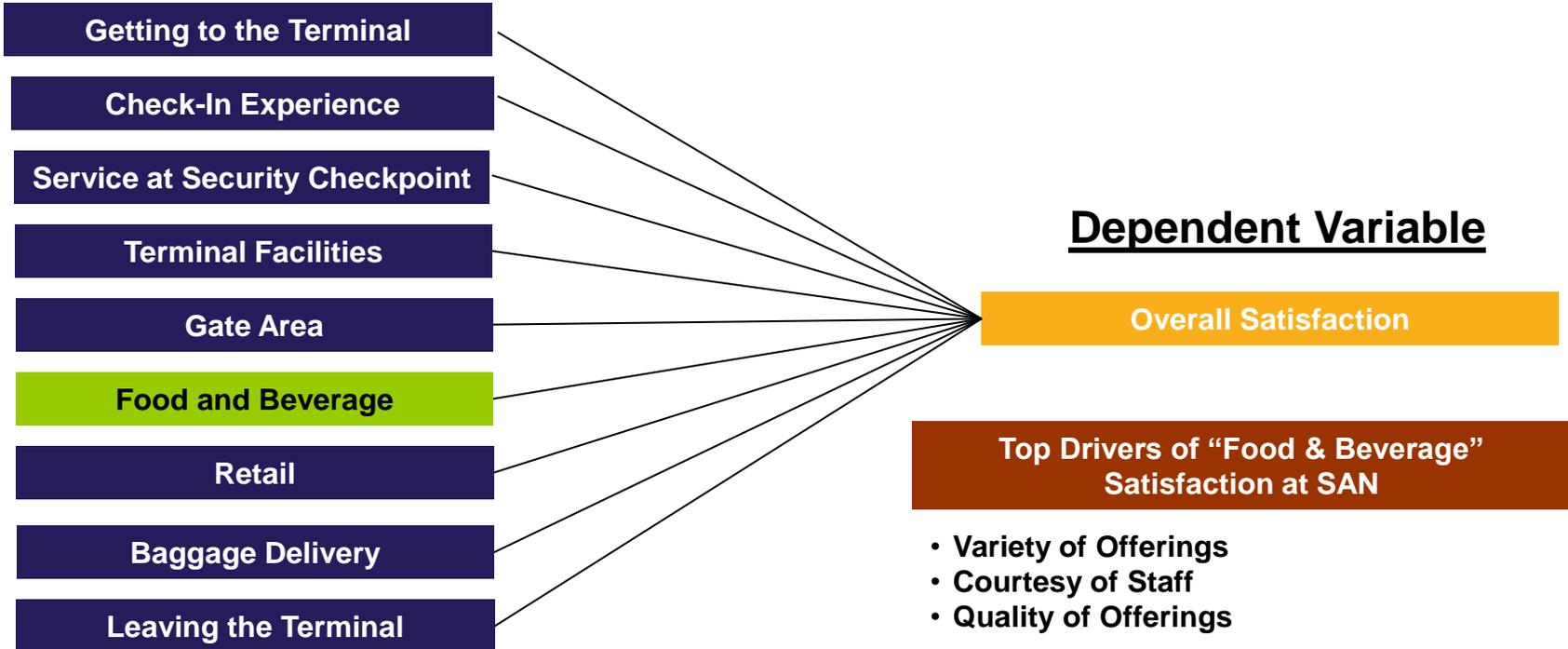
Top Two Box Percentages – 2010 Versus 2011 – SAN Total



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Percent responding Top Two Box, i.e., rating the airport a “4” or “5” on a five-point scale.

Independent Variables



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

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

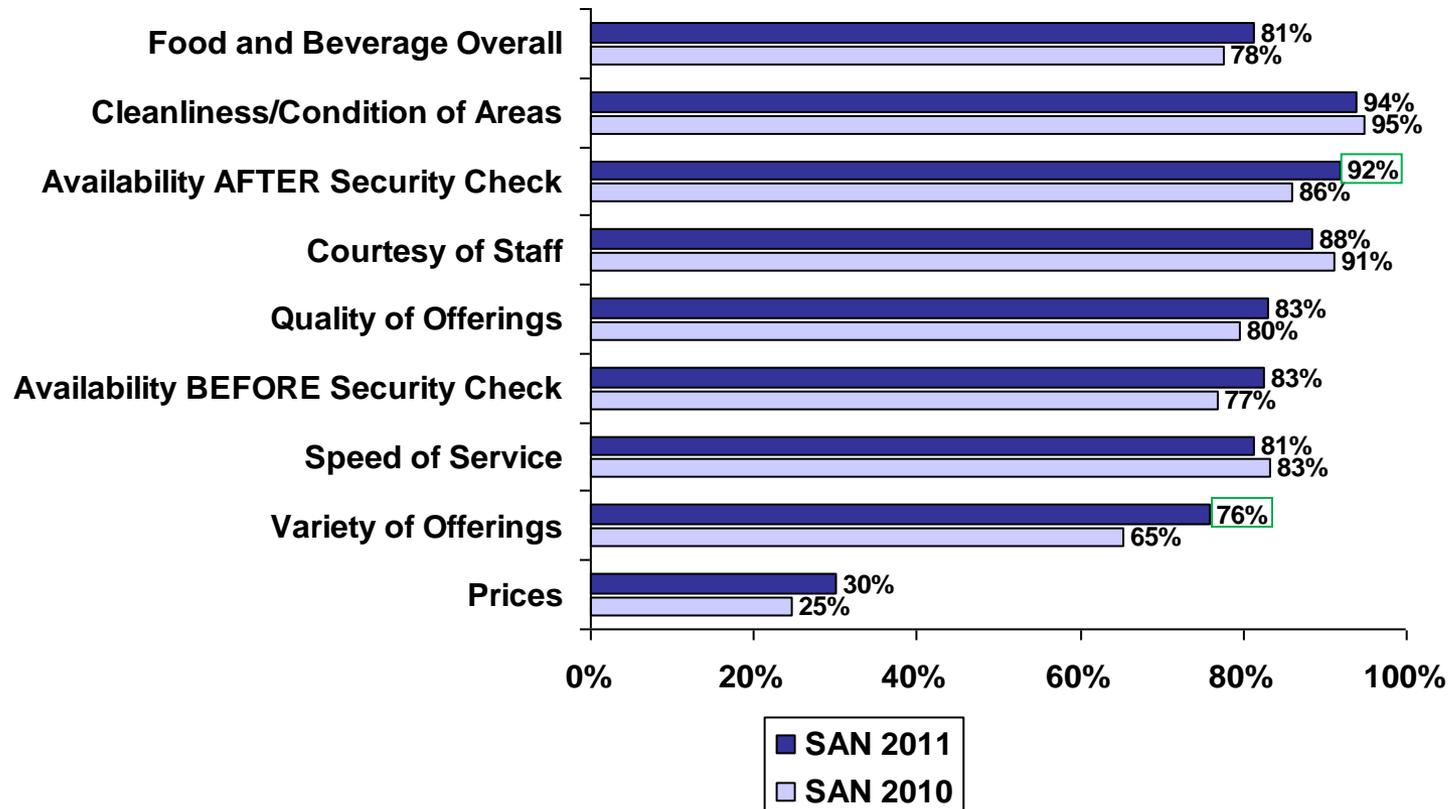
	SAN 2011	Terminal 1	Terminal 2	Commuter Terminal
Cleanliness/Condition of Areas	94%	93%	95%	97%
Availability AFTER Security Check	92%	92%	93%	82%
Courtesy of Staff	88%	88%	89%	94%
Quality of Offerings	83%	84%	82%	75%
Availability BEFORE Security Check	83%	89%	79%	23%
Speed of Service	81%	77%	86%	95%
Variety of Offerings	76%	77%	78%	49%
Prices	30%	29%	31%	41%
Food and Beverage Overall	81%	81%	83%	71%

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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”.

Satisfaction with “Availability After Security Check” and “Variety of Offerings” is Significantly Higher in 2011

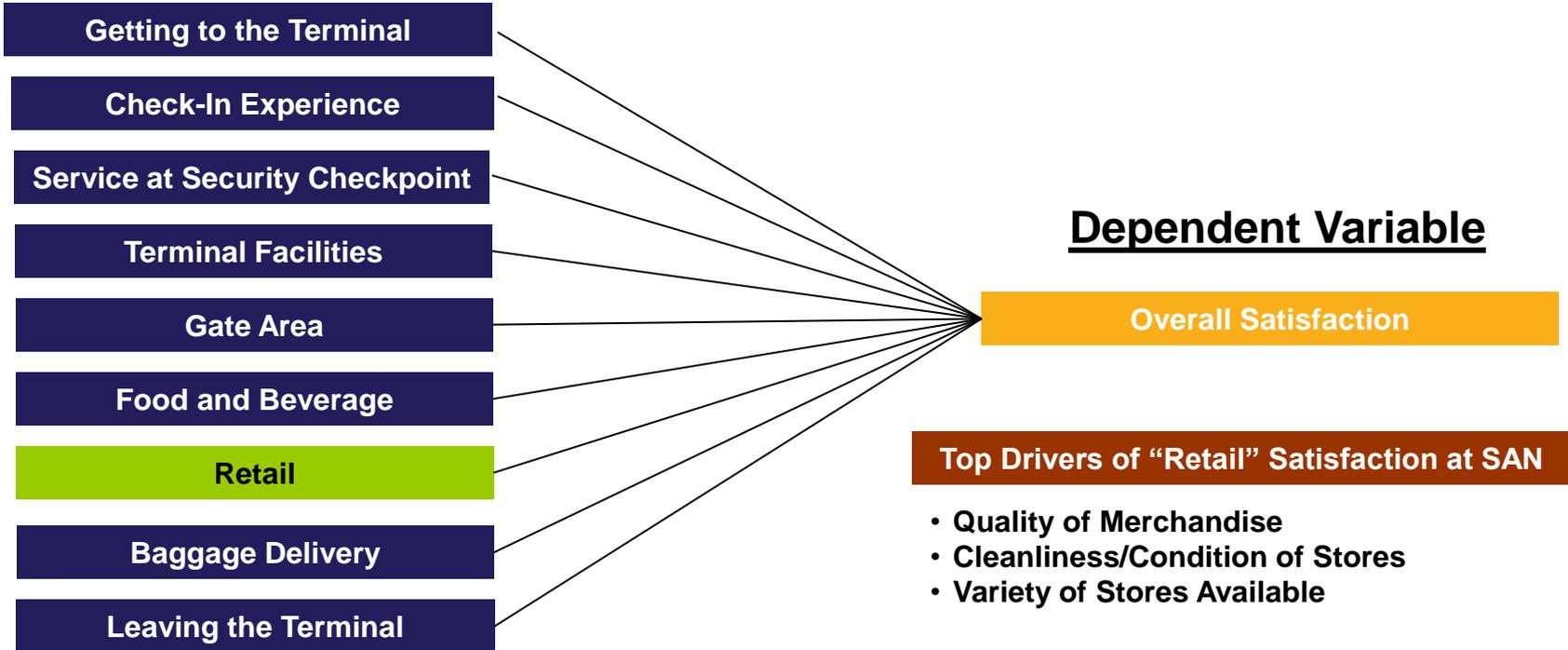
Top Two Box Percentages – 2010 Versus 2011 – SAN Total



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Percent responding Top Two Box, i.e., rating the airport a “4” or “5” on a five-point scale.

Independent Variables



Terminal 2 Receives the Highest Satisfaction Scores with Regards to Retail Services

Retail Top Two Box Percentages – SAN Total 2011

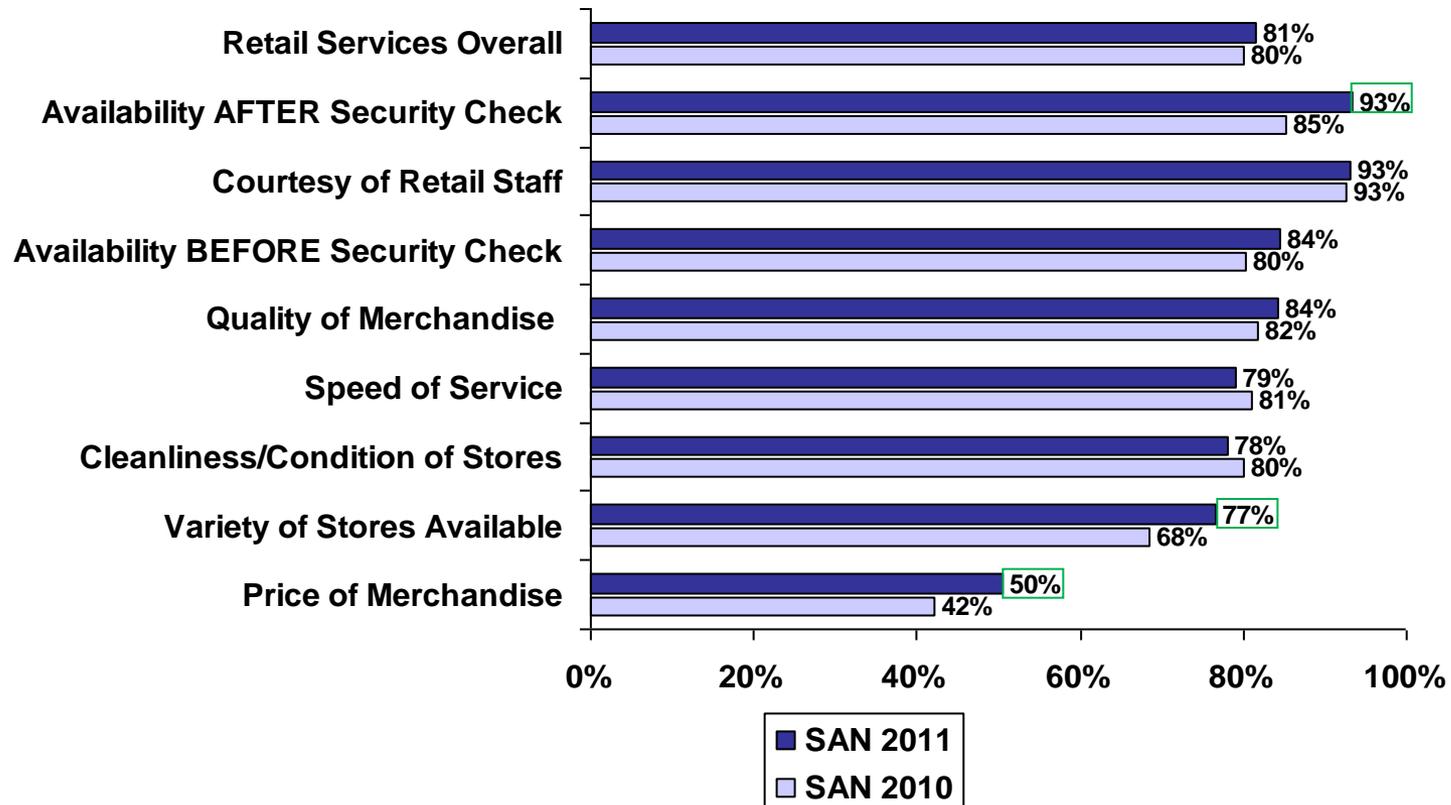
	SAN 2011	Terminal 1	Terminal 2	Commuter Terminal
Availability AFTER Security Check	93%	94%	94%	84%
Courtesy of Retail Staff	93%	93%	93%	96%
Availability BEFORE Security Check	84%	94%	77%	24%
Quality of Merchandise	84%	84%	85%	83%
Speed of Service	79%	78%	79%	91%
Cleanliness/Condition of Stores	78%	77%	79%	87%
Variety of Stores Available	77%	78%	77%	58%
Price of Merchandise	50%	49%	53%	47%
Retail Services Overall	81%	80%	83%	79%

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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”.

Satisfaction with “Availability After Security Check”, “Variety of Stores Available” and “Price of Merchandise” Increases Significantly in 2011

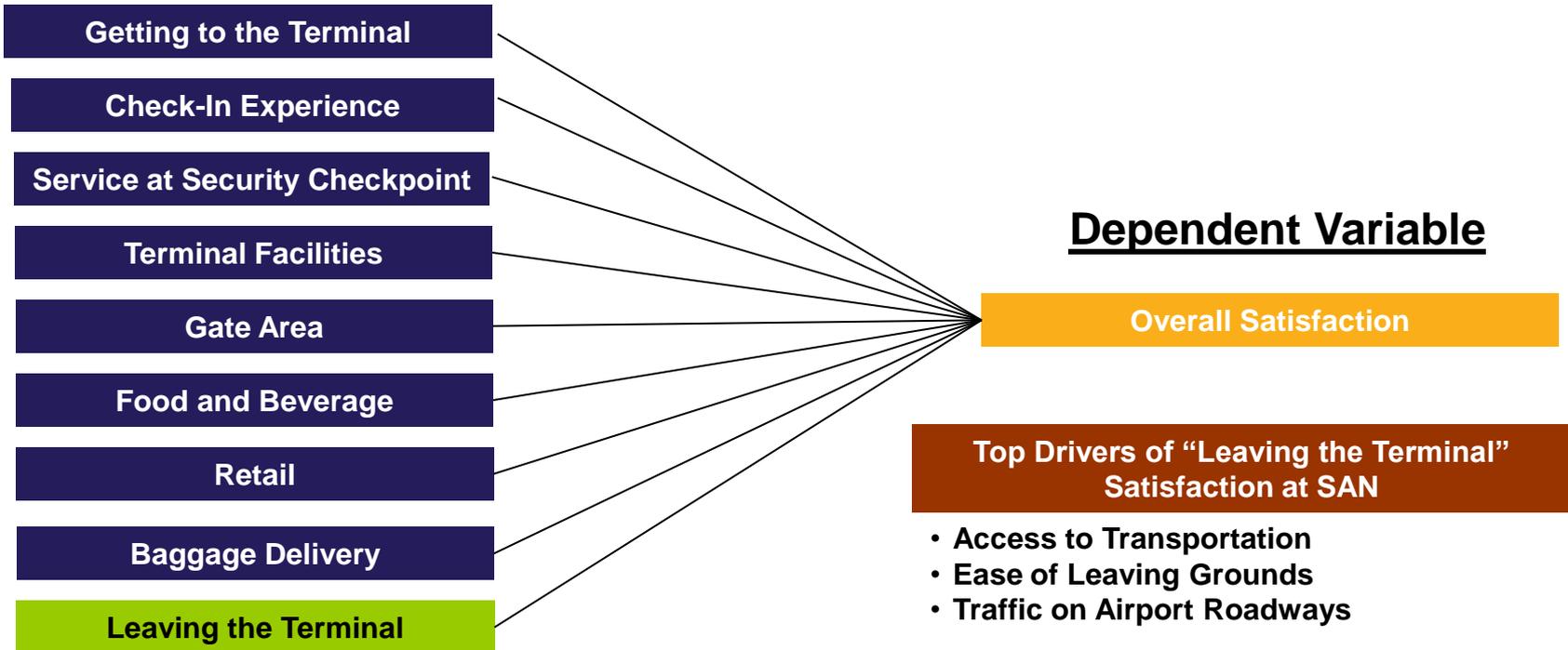
Top Two Box Percentages – 2010 Versus 2011 – SAN Total



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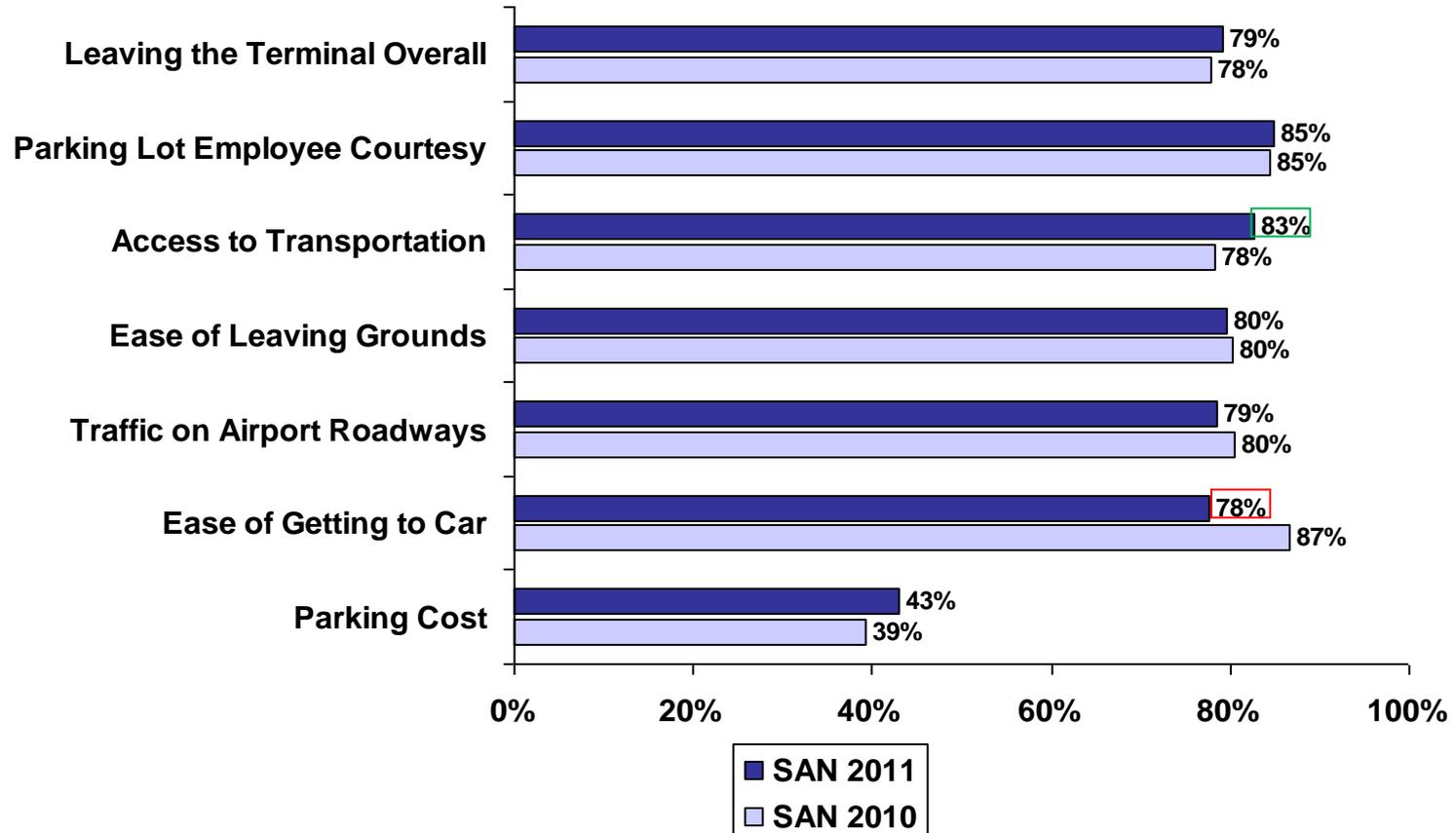
Percent responding Top Two Box, i.e., rating the airport a “4” or “5” on a five-point scale.

Independent Variables



Satisfaction with “Access to Transportation” Gains Significantly in 2011 and “Ease of Getting to Parked Car” Declines

Top Two Box Percentages – 2010 Versus 2011 – SAN Total



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SAN Baggage Survey

2011

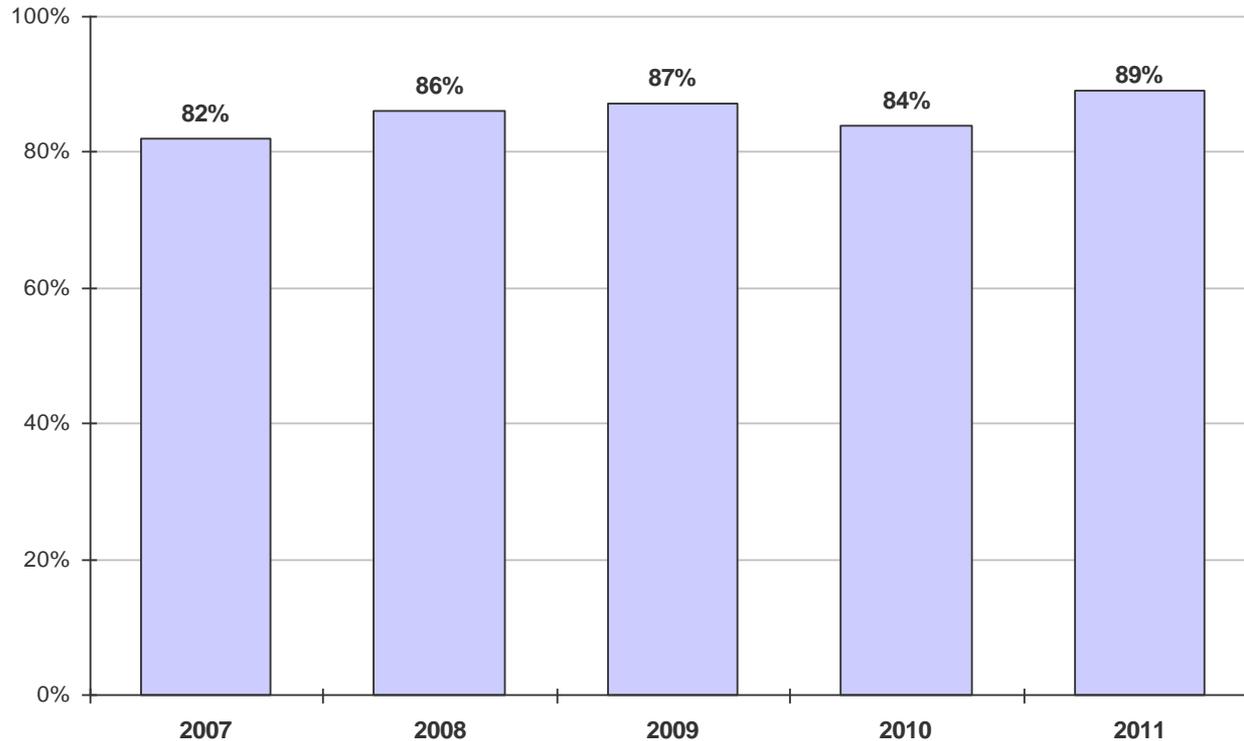


Methodology

- A total of 800 SAN passengers were interviewed in 2011. This yields a maximum error margin of +/- 3.5% for the year.
- Each interview was conducted “face-to-face” with a specific interviewer conducting every survey
- Arriving passengers were interviewed in the area of the baggage carousel
- Surveys were conducted during all the active dayparts of SAN
- A five-point scale was used where 1 is Very Dissatisfied and 5 is Very Satisfied

Baggage Delivery Overall Satisfaction Rating

Top Two Box Percentages Baggage Survey – SAN Total Year

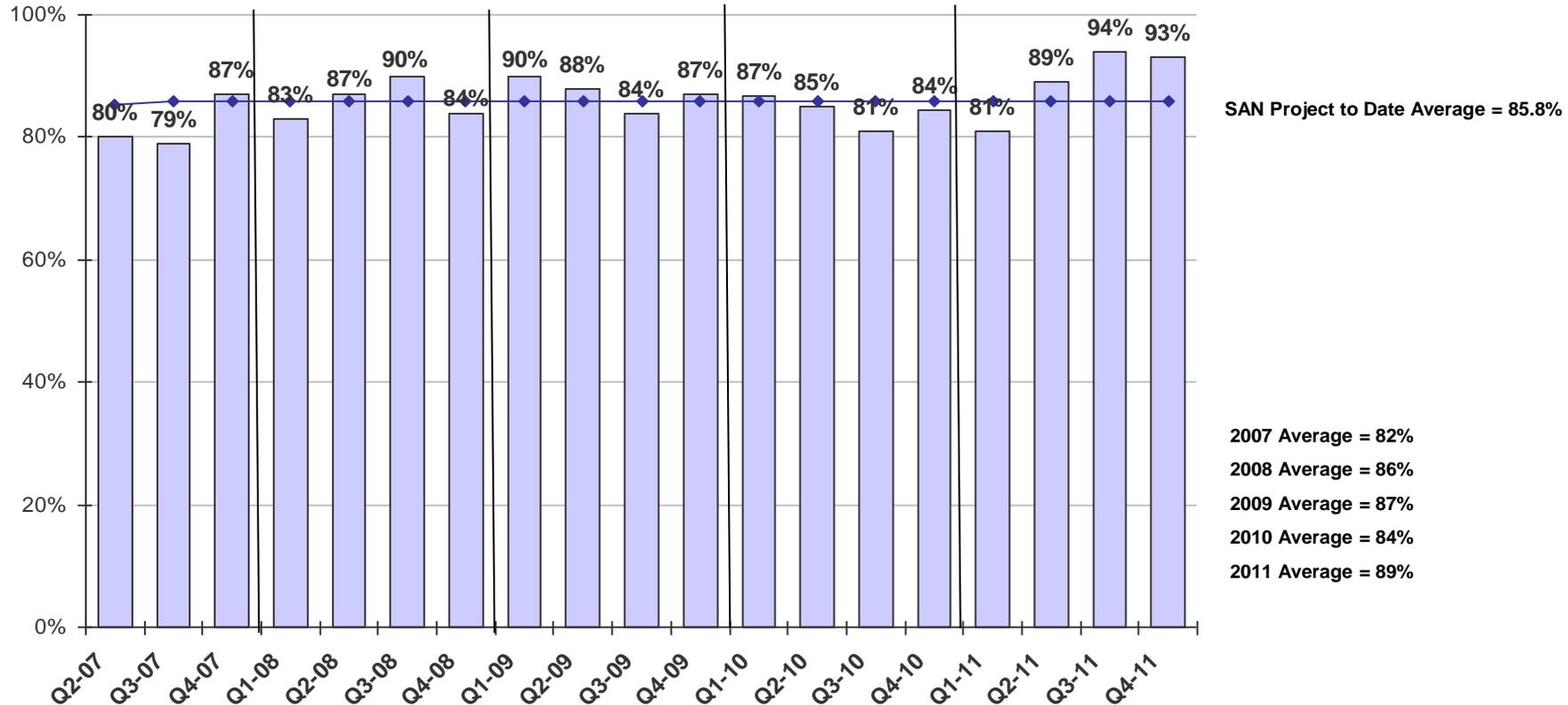


Percent responding Top Two Box, i.e., rating the airport a “4” or “5” on a five-point scale.

Baggage Delivery Overall Satisfaction Rating for the Past Five Years is 85.8%. Three Quarters are Above Average in 2011.

Top Two Box Percentages

Baggage Survey – SAN Total by Quarter



* The SAN average from Q2 2007 – 2010 had been 84.9%

Percent responding Top Two Box, i.e., rating the airport a "4" or "5" on a five-point scale.

Satisfaction with “Baggage Delivery Overall” Gains Significantly and in Three Factors in 2011

2007- 2011 Total Year

	2007	2008	2009	2010	2011
Accuracy of Receiving All Bags	93%	95%	98%	96%	97%
Timeliness of Baggage Delivery	77%	81%	86%	80%	86%
Cleanliness of the Baggage Carousel Area	75%	75%	74%	80%	84%
Information on Which Baggage Carousel to Use	68%	70%	73%	69%	81%
Signs or Directions to Baggage Claim Area	85%	82%	74%	71%	80%
Baggage Delivery Overall	82%	86%	87%	84%	89%

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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”.

Terminal One Lags Other Terminals In Overall Baggage Delivery Satisfaction

SAN Total 2011

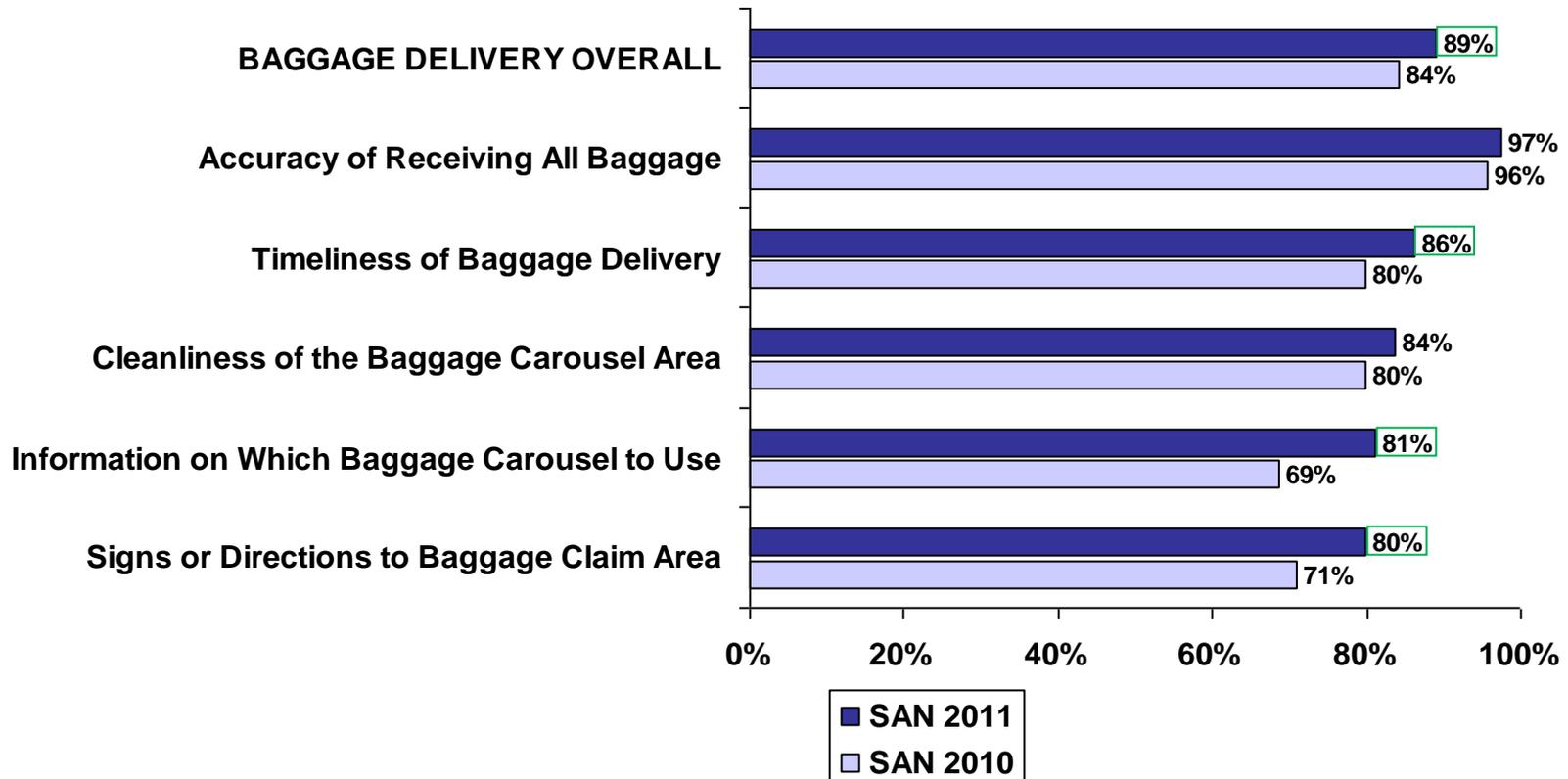
	SAN 2011	Terminal 1	Terminal 2	Commuter Terminal
Accuracy of Receiving All Bags	97%	98%	96%	98%
Timeliness of Baggage Delivery	86%	86%	86%	97%
Cleanliness of the Baggage Carousel Area	84%	77%	92%	89%
Information on Which Baggage Carousel to Use	81%	81%	81%	75%
Signs or Directions to Baggage Claim Area	80%	81%	77%	87%
Baggage Delivery Overall	89%	87%	91%	97%

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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".

Satisfaction with “Baggage Delivery Overall” Gains Significantly and in Three Factors in 2011

Top Two Box Percentages – 2010 Versus 2011 Baggage Survey – SAN Total



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Percent responding Top Two Box, i.e., rating the airport a “4” or “5” on a five-point scale.

SAN Baggage Survey – Annual 2011

	SAN	Terminal 1	Terminal 2	Commuter Terminal
Number of Bags Checked by Travel Party				
One	46%	47%	45%	48%
Two	27%	30%	25%	19%
Three	12%	9%	15%	12%
Four	8%	7%	9%	9%
Five or more	7%	7%	6%	14%
Mean # of Bags	2.1	2.0	2.1	2.4
Average Number of People in Travel Party	1.8	1.8	1.8	1.6

Note: Percentages may not add up to 100% due to rounding.

Thank You!

Scott Ludwigsen
Executive Vice President – Travel Research Group
Phoenix Marketing International
1 Executive Drive, Suite 270
Somerset, NJ 08873
(732) 563-8503
Scott.Ludwigsen@Phoenixmi.com

www.phoenixmi.com

