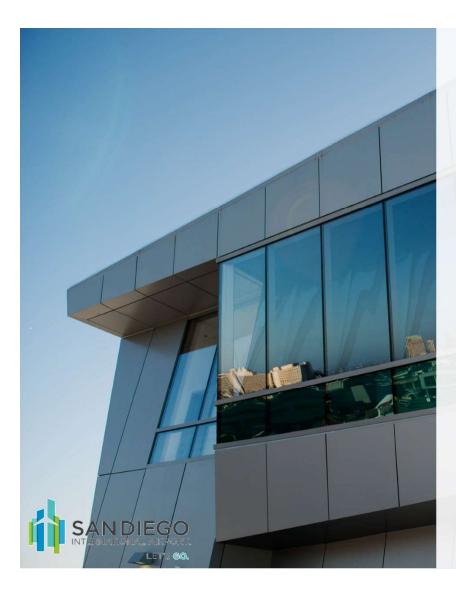


GT Industry Stakeholder Meeting

LET'S GO.

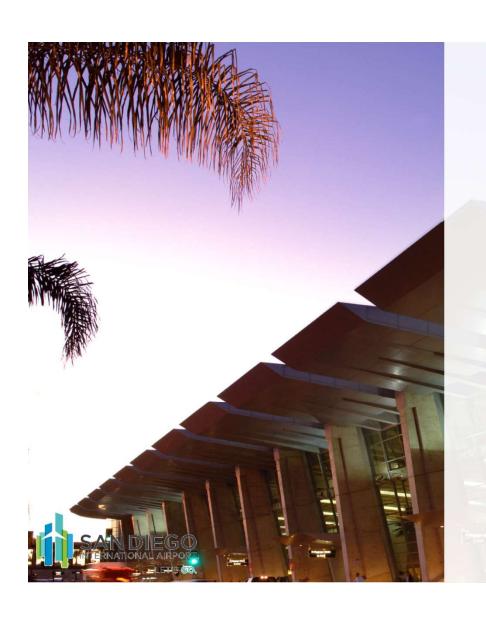
San Diego County Regional Airport Authority Ground Transportation Team March 24, 2021



Agenda

- 1. Welcome Marc Nichols, Director GT
- 2. Strategies, Vision, Mission, and Goals
- 3. Airport Enplanements
- 4. GT Trip Activity By Mode
- 5. COVID-19 Mitigation Measures & Accomodations
- 6. Airport Facilities & Operations Update
- 7. Operations Update Richard Wilson, Manager GT
- 8. Permitting Update Michael Anderson, Manager GT
- 9. Budget Outlook
- 10. Airport Development Plan Update
- 11. Open Taxi Transition
- 12. Recent Authority Code Updates
- 13. GTAC Progress
- 14. Environmental Update
- 15. Q&A Period





Welcome Remarks

Authority Strategies



Community

Be a trusted and highly responsive agency.



Financial

Enhance the financial position of the Authority.



Customer

Achieve the highest level of internal and external customer satisfaction.



Operations

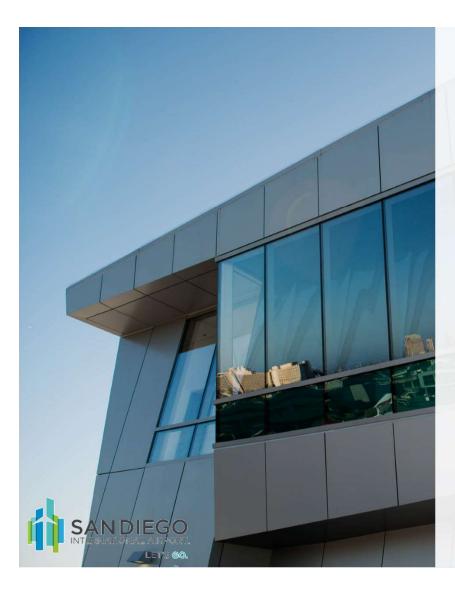
Operate our airport in a safe, secure, environmentally sound, effective, and efficient manner.



Employee

Achieve the highest level of employee commitment and performance.

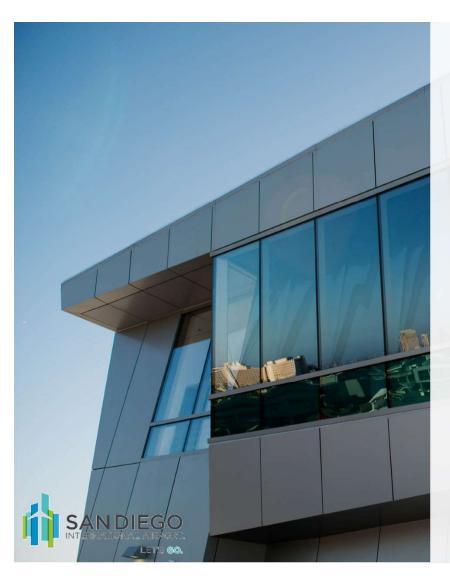




GT Vision

Our vision is for the travelling public to view our airport as having the best customer-focused landside experience in the country, today and tomorrow.

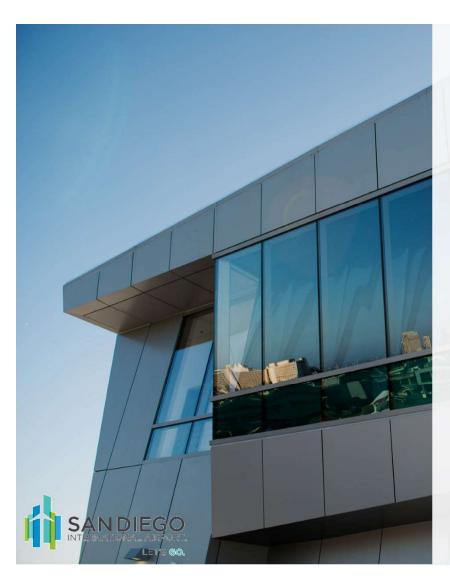




GT Mission

Through innovation and collaboration, our mission is to create an efficient, safe, and friendly landside experience.





Ground Transportation Goals

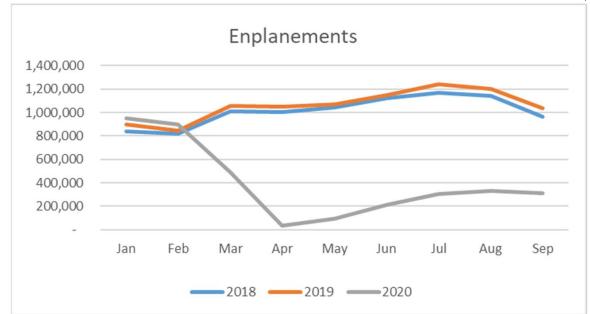
- 1. Safety
- 2. High quality customer service
- 3. Efficiency
- 4. Cost recovery for operations and infrastructure
- 5. Economic value to the providers
- 6. Minimal unnecessary trips & congestion
- 7. Reduced environmental impact
- 8. Alignment with airport strategies



Airport Enplanements

SDCRAA
Three Year Comparison of Enplanements and Ground Transportation Activity
For the calendar months presented

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total	% Prior Year
Enplanements											,			
2018	840,479	821,285	1,009,853	1,002,428	1,043,331	1,124,860	1,165,456	1,139,314	963,790	1,025,924	1,005,813	984,141	12,126,674	
2019	895,859	847,912	1,056,861	1,052,524	1,070,628	1,147,974	1,238,315	1,202,469	1,034,475	1,070,451	1,003,157	1,060,131	12,680,756	4.6%
2020	953,280	899,877	486,659	36,839	95,386	210,238	305,716	333,490	311,244	348,206	341,782	306,911	4,629,628	-63%







GT Trip Activity by Mode

- 1. For February, trip activity is down significantly for all modes since February 2020; an average of -80%.
- 2. For much of the last year since Mar 2020, trip activity has been down between 65-80% from the prior year.
- 3. We are seeing a slight uptick in activity in the past couple of weeks.
- 4. This past week, activity has only been down about 60% from the prior year, as opposed to being down between 70-78% for the most recent weeks in February.
- 5. The weekend of March 12-13 was the busiest travel weekend since the prior March.
- 6. Some of this may be attributed to Spring Break activity.
- 7. But may also be due to pent up travel demand now that more people are being vaccinated, and SoCal business are opening back up.
- 8. JAL has started back up again in March, and we are awaiting news on when BA and Lufthansa may begin again.
- 9. We will discuss the FY 2022 budget enplanements later.

GT Trip Activity By Mode

SDCRAA GT Commercial Mode Trips and Fees For the periods shown

						CY 20	020						CY 2021		
Commercial Mode Trip	s - #														
	<u>Jan-20</u>	Feb-20	Mar-20	Apr-20	May-20	Jun-20	<u>Jul-20</u>	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	Jan-21	Feb-21	% Change
Taxi	38,323	38,411	13,883	1,232	2,649	4,618	6,166	7,663	7,769	8,307	6,845	6,049	5,572	6,005	-84.4%
VFH	1,285	1,382	639	63	158	206	254	297	319	239	197	172	134	145	-89.5%
Hotel/Motel	9,123	8,552	6,090	1,312	1,059	1,782	2,454	2,258	2,366	2,595	2,674	2,482	2,306	2,331	-72.7%
Off-Airport Parking	14,039	13,531	8,657	1,408	989	2,594	3,891	5,419	5,381	5,698	5,793	4,843	4,188	3,866	-71.4%
TNC - PU	189,183	179,901	82,971	6,517	13,186	24,432	35,575	38,900	40,737	46,119	43,967	39,270	36,467	33,675	-81.3%
TNC - DO	195,059	203,227	96,645	6,689	14,628	27,610	38,707	41,709	45,257	51,180	49,925	46,929	29,576	37,770	-81.4%
Total TNC PU/DO	384,242	383,128	179,616	13,206	27,814	52,042	74,282	80,609	85,994	97,299	93,892	86,199	66,043	71,445	-81.4%
Total Trips	447,012	445,004	208,885	17,221	32,669	61,242	87,047	96,246	101,829	114,138	109,401	99,745	78,243	83,792	-81.2%
Commercial Mode Trip	Fees - \$														
	<u>Jan-20</u>	Feb-20	Mar-20	Apr-20	May-20	<u>Jun-20</u>	<u>Jul-20</u>	Aug-20	Sep-20	Oct-20	Nov-20	Dec-20	<u>Jan-21</u>	Feb-21	
Taxi	\$ 115,041	\$ 115,243	\$ 41,672	\$ 3,776	\$ 8,102	\$ 14,033	\$ 18,691	\$ 23,177	\$ 23,241	\$ 23,241	\$ 25,069	\$ 20,660	\$ 18,259	\$ 16,814	-85.4%
VFH	\$ 3,324	\$ 3,758	\$ 1,666	\$ 160	\$ 389	\$ 517	\$ 653	\$ 773	\$ 249	\$ 828	\$ 630	\$ 528	\$ 475	\$ 363	-90.4%
Hotel/Motel	\$ 29,959	\$ 28,308	\$ 19,394	\$ 4,092	\$ 3,540	\$ 6,014	\$ 8,320	\$ 7,441	\$ 2,084	\$ 6,815	\$ 7,568	\$ 7,791	\$ 7,194	\$ 6,709	-76.3%
Off-Airport Parking	\$ 22,355	\$ 22,681	\$ 14,489	\$ 2,056	\$ 1,479	\$ 4,739	\$ 6,977	\$ 9,325	\$ 2,621	\$ 9,266	\$ 9,885	\$ 9,986	\$ 8,452	\$ 7,243	-68.1%
TNC - PU	\$ 664,404	\$ 629,690	\$ 290,433	\$ 22,810	\$ 46,151	\$ 85,512	\$ 124,513	\$ 136,150	\$ 142,580	\$ 161,417	\$ 153,885	\$ 137,445	\$ 127,635	\$ 117,863	-81.3%
TNC - DO	\$ 682,707	\$ 711,295	\$ 338,258	\$ 23,412	\$ 51,198	\$ 96,635	\$ 135,475	\$ 145,981	\$ 158,400	\$ 179,130	\$ 174,738	\$ 164,252	\$ 103,516	\$ 132,195	-81.4%
Total TNC PU/DO	\$1,347,111	\$1,340,985	\$ 628,690	\$ 46,221	\$ 97,349	\$ 182,147	\$ 259,987	\$ 282,131	\$ 300,979	\$ 340,547	\$ 328,622	\$ 301,697	\$ 231,151	\$ 250,058	-81.4%
Total Fees	\$1,517,790	\$1,510,976	\$ 705,911	\$ 56,304	\$ 110,859	\$ 207,450	\$ 294,629	\$ 322,846	\$ 329,174	\$ 380,696	\$ 371,773	\$ 340,662	\$ 265,529	\$ 281,185	-81.4%



Covid-19 Mitigation Measures & Accommodations

SDCRAA

- 1. Enabling online/digital permitting for all modes to reduce wait time for activation.
- 2. Eliminating the need for in-office administrative processing.
- 3. Reducing the required insurance limit from \$1M to \$350K.
- 4. Reducing the insurance rating requirement from A- to B-.
- 5. Opening the airport to all City of San Diego taxis.
- 6. Keeping FY 2021 trip fees flat to prior year.
- 7. Waiving the \$3,000 airport permit transfer fee between existing operators.
- 8. Waiving the one-time transfer limitation for airport permits.
- 9. Permanently removing the 10-year vehicle age restriction.
- 10. Honoring the MTS taxi medallion temporary surrender program.
- 11. Allowing taxis in temporary surrender status to begin the process for online permit application.

MTS

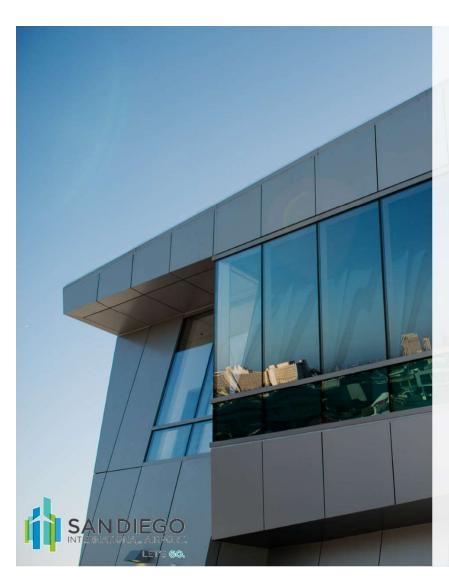
- 12. Removing the 6-month-experience requirement for taxi drivers.
- 13. Removing the requirement to provide proof of eligibility of insurance.
- 14. Removing the requirement to provide proof of ability to meet permit holder financial criteria.
- 15. Removing the requirement to add ADA vehicle with second vehicle.
- 16. Permanently removing the 10-year vehicle age restriction.
- 17. Removing the requirement for off-street vehicle storage.
- 18. Removing the requirement for 24-hour dispatch administrative office.





Airport Facilities & Operations Update

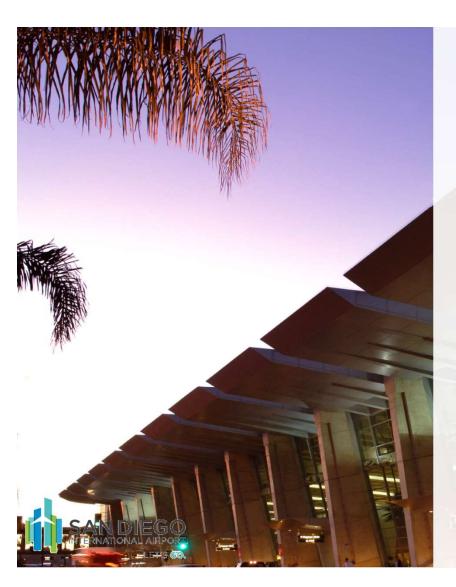
- 1. Relocation of employee parkers from the north side employee lot to the south side customer parking lots.
- 2. Cessation of the employee parking shuttle service.
- Cessation of the Inter-terminal shuttle.
- 4. Closure of the Long Term parking Lot and cessation of the Long Term Lot shuttle service. *This lot will likely not re-open due to upcoming ADP construction*.
- 5. Cessation of the valet parking service at both terminals.
- 6. Closure of the customer cell phone lot.
- 7. Reduction of RCC Bus service levels and reduced customer loading (10 passengers per bus) to minimize COVID-19 spread.
- 8. Cessation of Taxi Customer Service Representatives (CSRs) at the taxi hold lot and on the transportation islands.
- 9. Cessation of the Lyft Fast-Match, and Uber PIN-Match products at both terminals to minimize queueing.
- 10. Reduction in size of the TNC hold lot.
- 11. Move to online and web-based services for GT permitting staff.
- 12. Shift changes and terminal based cohort assignments for ATO Essential Worker staff.
- 13. Mandatory temperature and symptom screening for all onairport employees
- 14. Cessation of the Volunteer Ambassador Program.



Operations Update - Richard Wilson

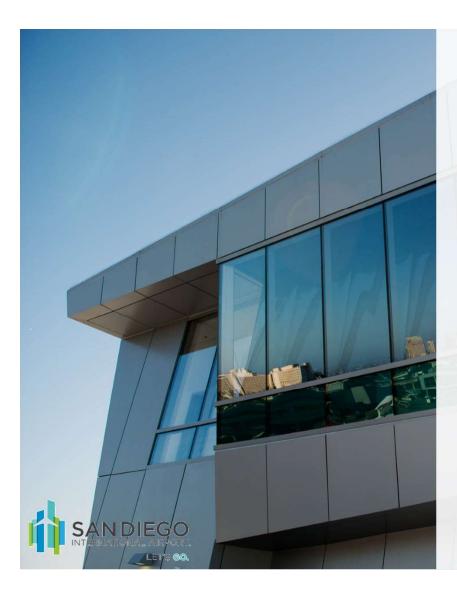
- 1. ATO Activities
- 2. Taxi Operational issues
 - 1. Hold Lot traffic and exiting
 - 2. "Bell" cab procedures
 - Fare refusals
 - 4. Virtual Hold Lot Check-in, Check-out
 - 5. RCC Taxis
- 3. TNCs Authorized Areas
- 4. Ace Support
- 5. RCC Bus Activity
- 6. Transient/Un-housed activity
- 7. New Operators





Permitting Update - Michael Anderson

- 1. Most GT Staff are working remotely and the GT office is closed to visitors.
- 2. Please go https://www.san.org/Business-opportunities/Ground-Transportation for information.
- 3. Email GT at GTpermits@san.org for assistance.
- 4. GT has issued vehicle permits to over 540 ground transportation operators over the last couple of months.
- 5. 27 new taxi operators have completed the permit process since the transition.
- 6. All vehicle decals have been mailed out and should be placed on windshield prior to operating at Airport.
- 7. Ace is installing the transponder tags, as always.
- 8. Permit renewal is coming up and application will be sent out the first week of June for the next Fiscal Year permit period for Courtesy, OAP, Rent-Car, Taxi, TNC, and VFH.
- 9. For new operators, we send out applications weekly to those who request them from GTpermits@san.org
- 10. Applications go out every Friday.
- 11. We thank the community for working with us in implementing the new processes during the pandemic Thank you!

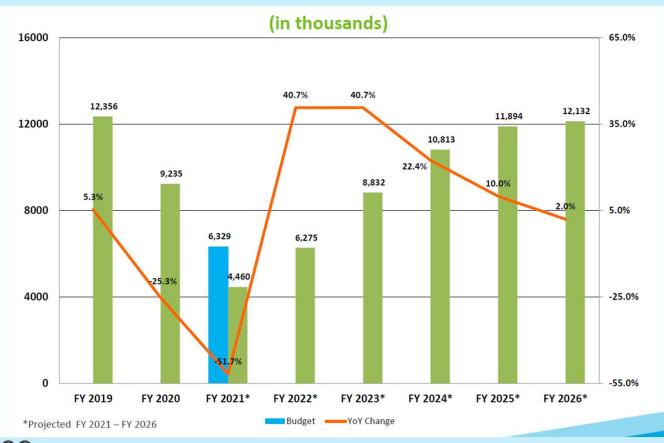


Budget Outlook

- 1. Enplanements as displayed on the next slide.
- 2. Authority typically budgets very conservatively.
- 3. Continue the trip fee model as in prior year.
- 4. FY-2021 Trip Fees remained flat to FY-2020
- 5. FY-2022 Trip Fees will remain flat to FY-2021
- 6. Application Fee for all modes \$200.
- 7. Increase in technology tools and contractor services to administer permitting and regulatory processes.
- 8. GT mode activity closely tracks enplanements.
- 9. Traffic may recover more quickly than budgeted.
- 10. The Authority Budget and associated trip fees will be approved at the Board meeting in May, as required.



ENPLANEMENTS OUTLOOK





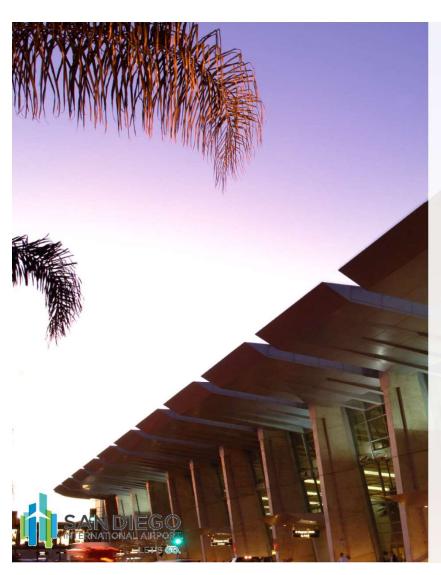
FY-2022 Trip Fees (Flat to FY-2021)

Ground Transportion

Schedule of Fees

Mode	Base Fee	AFV Incentive Rate	Non- AFV Rate	Date Range	
Charter Limousine (For 2020 Permit) ¹	\$210.12	N/A	N/A	1/1/2020-12/31/2020	
Courtesy / Hotel-Motel	\$1.94	\$1.46	\$3.88	7/1/2020-6/30/2021	
Off-Airport Parking	\$1.94	\$1.46	\$3.88	7/1/2020-6/30/2021	
Off-Airport Rent-A-Car ¹	\$200.00	\$150.00	\$400.00	7/1/2020-6/30/2021	
Taxicab	\$3.97	\$2.98	\$7.94	7/1/2020-12/31/2020	
Transportation Network Company (TNC)	\$3.50	N/A	N/A	7/1/2020-6/30/2021	
Vehicle-For-Hire	\$3.16	\$2.37	\$6.32	7/1/2020-6/30/2021	





Airport Development Plan (ADP) Update

- 1. Currently in DESIGN phase for all three packages:
- Terminal and Roadway
- > Terminal 1 Parking Plaza
- Administration Building
- 2. Potholing and drilling has already begun on south side.
- 3. This will be the largest construction project ever undertaken at the airport.
- 4. We will see impacts to LT Lot and Terminal 1 Parking Lot in Jan 2022.
- 5. Employees will move back to the north side employee Lot in Jan 2022.
- 6. Valet operations will move over to T2W in Jan 2022.
- 7. T2PP and T2W will be the only available customer parking lots for some time.
- 8. ASB Building is nearing completion an ready for activation/commissioning.

San Diego International Airport January 2021



Overall Project Scope



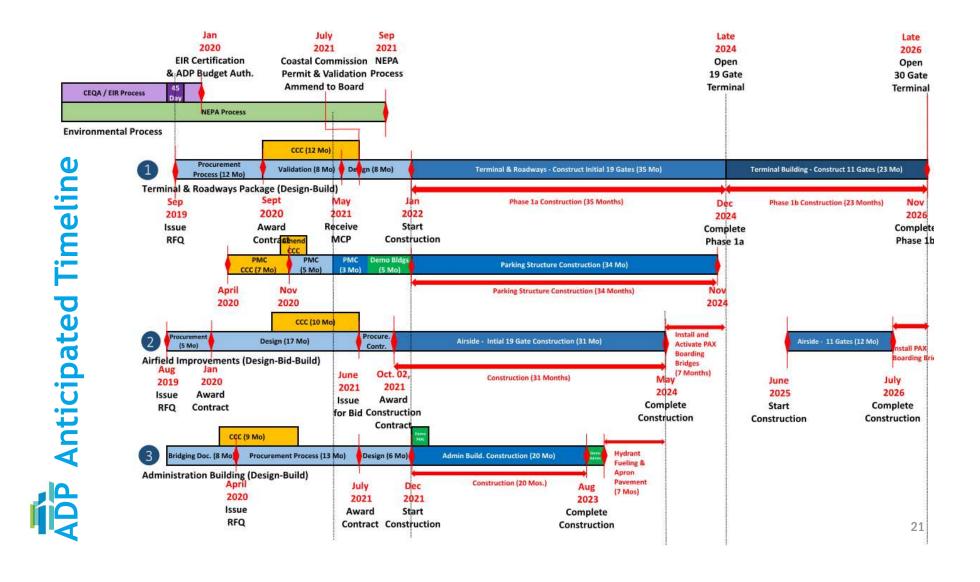


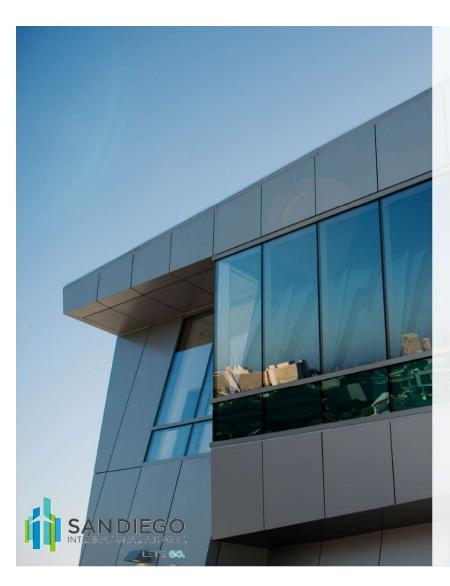
Package 1 - Terminal and Roadways

Package 2 – Airside Improvements

Package 3 – Administration Building



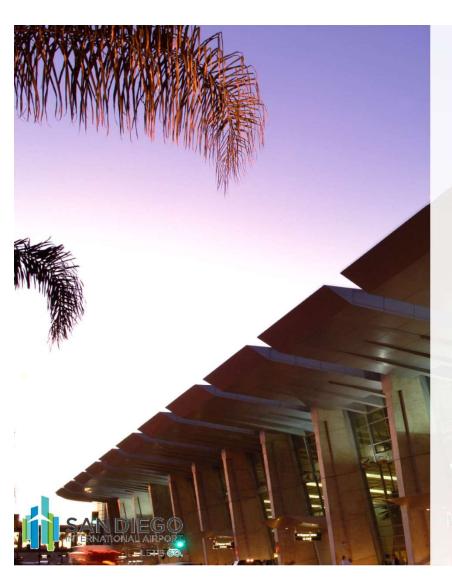




Open Taxi Transition Update

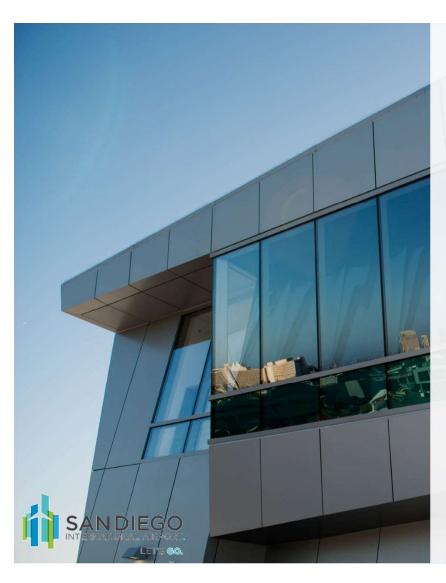
- 1. GT has been permitting "new" taxi operators since Dec-2020
- 2. Adoption of the online permitting process has been robust.
- 3. Best way to start the process is to e/mail -GTPermits@san.org.
- 4. Airport codes were updated in Dec-2020 to accommodate the new operating environment.
- 5. Charged new airport operators the \$200 application fee.
- 6. Starting in FY-2022, all modes will pay the \$200 application fee on a per-company basis.
- 7. Currently there are no taxi supply limits on taxi activity.
- 8. Any taxi is allowed to operate every day at will.
- 9. Even so, we have had some shortages in the late evening hours.
- 10. GT is honoring the MTS temporary permit surrender.
- 11. Taxi operators may apply for airport permit while in surrender status.
- 12. When your taxi is re-activated with MTS, you can be added back at the airport and added to the dispatch queue.





Recent Authority Code Updates

- Updates to City Council Policy No. 500-02 and MTS Ordinance 11 (Taxicab Regulation)
 - a. Level Playing Field Issues
- 2. Authority COVID-19 Emergency Powers Accommodations by Authority CEO
- 3. Authority Open Taxi System Transition on January 1, 2021



Affected Authority Codes

- 9.12 Permits & Vehicle Age
- 9.19 Issuance and Transfer
- 9.21 Vehicle Condition
- 9.30 Vehicle Operations

All Authority Codes are available at – https://www.san.org/Airport-Authority/About-the-Authority



Code 9.12, a, 1 - Vehicle Restrictions

Proposed Code Update

(1) Beginning July 1, 2012, the total number of authorized vehicle decals for Taxicab permits shall not exceed 450 for the Airport. A reserve list shall be retained and may be used by the President/CEO for possible replacements. The President/CEO has the discretion to determine the number of Airport permits that may be issued and outstanding at any time. The President/CEO has the discretion to determine the number of Taxicabs that may serve the Airport each day.



Code 9.12, a, 5 – Vehicle Age

Proposed Code Update

(5) No Taxicab, Charter Vehicle, Vehicle for Hire, Courtesy Vehicle, or TNC vehicle shall be operated at the Airport without the appropriate current Airport-issued vehicle decal or approved vehicle trade dress and having passed inspection as provided by this Code. No Taxicab, Charter Vehicle, Vehicle for Hire, Courtesy Vehicle, or TNC Vehicle more than ten (10) years old shall be allowed to operate at the Airport.



Code 9.19, b, 2, ii - Transferability

Proposed Code Update

- (2) Taxicabs and TNC Vehicles. In the event the Board exercises its discretion to issue Commercial Ground Transportation Service Permits for Taxicabs or TNC Vehicles ("Taxicab/TNC Permits") for any subsequent one-year period after June 30, 2014, the holder of any Taxicab/TNC Permit no longer wishing to operate under said Taxicab/TNC Permit must do one of the following:
 - (i) Return the Taxicab/TNC Permit to the Authority; or
 - (ii) Transfer the Taxicab/TNC Permit to an Authority-approved recipient ("Transferee"), and
 - a. Pay the Authority a one-time transfer fee of \$3,000 per permit.,
 - b. Secure the prior written consent of the President/CEO., and
 - c. Advise the Transferee in a writing approved by the Authority that the Taxicab/TNC Permit is no longer transferrable and must be returned to the Authority if the Transferee no longer wishes to operate under the Taxicab/TNC Permit.



Code 9.21, c, 4 – Pickup Areas

Proposed Code Update

(4) Before entry onto Airport property without passengers or after discharging passengers on Airport property, every Taxicab or Vehicle for Hire operator shall proceed to the off-Airport designated hold lot or pickup area as designated by the President/CEO and wait with the vehicle at the hold lot until an authorized officer or designate issues a time-stamped dispatch ticket and dispatches the vehicle and operator to the Airport. The vehicle operator shall give the valid dispatch ticket to an authorized officer or designate on duty at the Airport before the operator is authorized to pick up or engage any passenger for hire. Picking up any passenger for hire after or while leaving off any other passenger without proceeding through the designated hold lot or pickup area and being issued a valid dispatch ticket is prohibited. The President/CEO, from time to time, may establish, change or modify the rules, regulations and dispatch procedures for operation of the off-Airport hold lots.



Code 9.30, k – Operations

Proposed Code Update

(k) No person operating a Taxicab or discharging from said Taxicab any passenger for hire in front of the passenger shall accept or solicit any passenger for hire in front of said passenger until after said Taxicab has proceeded in turn through and appropriate Taxicab holding area, or pickup area, or and Taxicab loading zone as designated by the President/CEO.



GTAC Progress

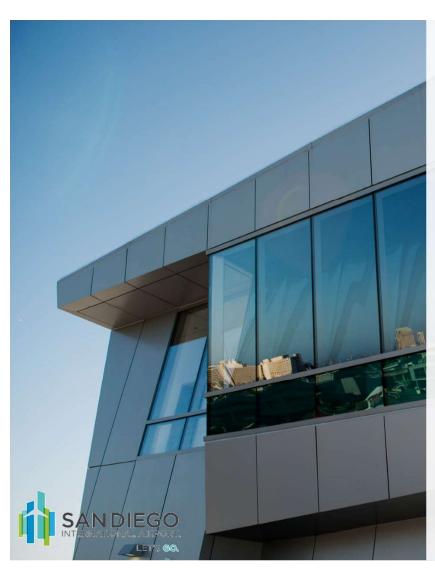
Focus Areas

- A. General Operations
- B. Operating Models
- C. Congestion Management
- D. Technology
- E. Operational Compliance
- F. Environmental

Principles

- 1. Alignment with the Airport Authority's mission, goals and strategies is a critical priority for all policy relating to ground transportation.
- 2. Alignment must also be maintained with local and state operational and regulatory requirements.
- 3. Every effort should be made to engage state and local agencies to address congestion, environmental, and other issues related to ground transportation.
- 4. Policies should maximize flexibility for all modes, promote economic and environmental sustainability, and reflect a comprehensive approach aligned with the region's transportation strategies.
- 5. Policies must reflect the current and most relevant passenger volumes, traffic conditions, and customer needs.
- Ongoing reporting, transparent communication, and feedback opportunities will be established and maintained with transportation stakeholders.

https://www.san.org/Business-Opportunities/Ground-Transportation#6914280-gt-landside-operations



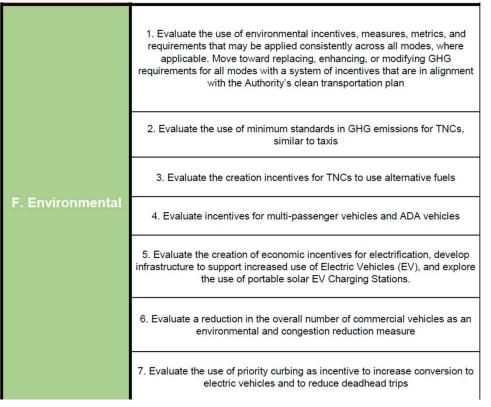
Collaborative Framework Document

- Describes the role, responsibilities, and expectations of the Authority and providers.
- Describes limits and set expectations for participants.
- Defines conditions inherent in the GT system.
- Describes policy requirements, initiative development and evaluation criteria.
- Promotes measures of effectiveness.
- Establishes accountability.
- Ensures alignment with Authority Strategies and Ground Transportation Goals.
- Describes recommendations for policy and initiative development.



Environmental Update

Alignment between GTAC and the SAN Clean Transportation Plan

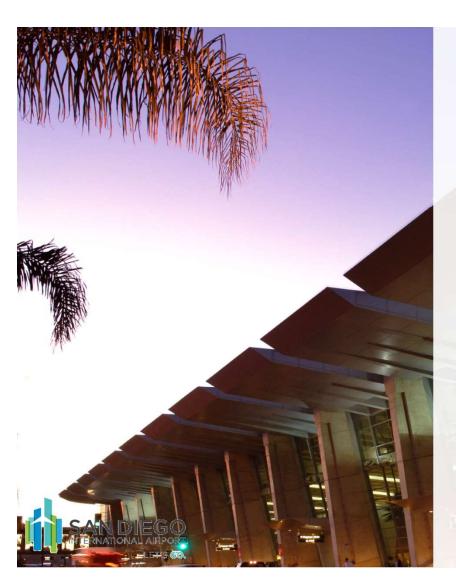






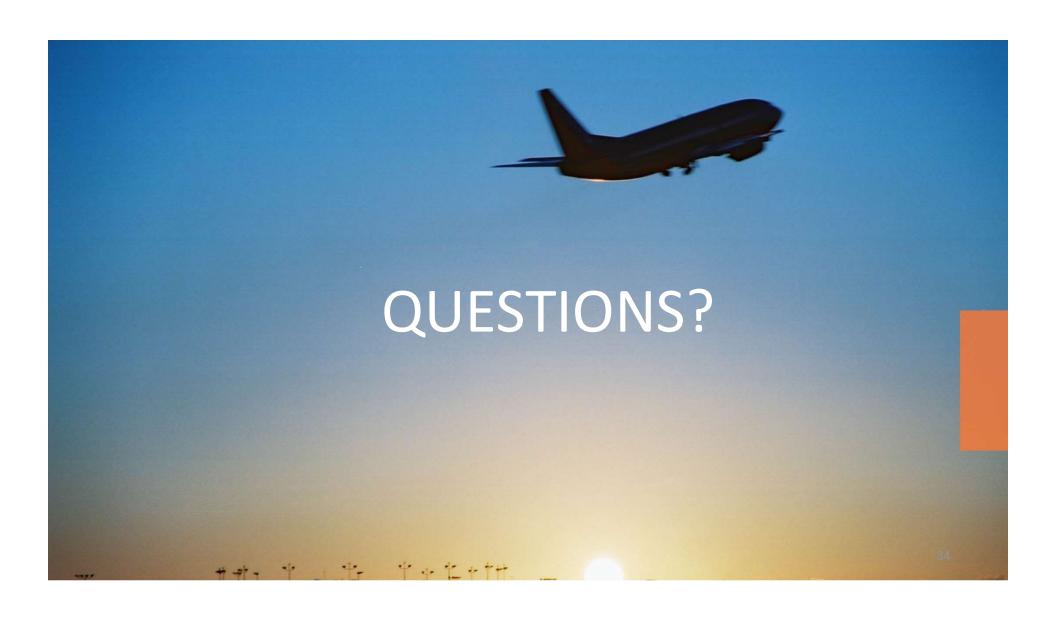


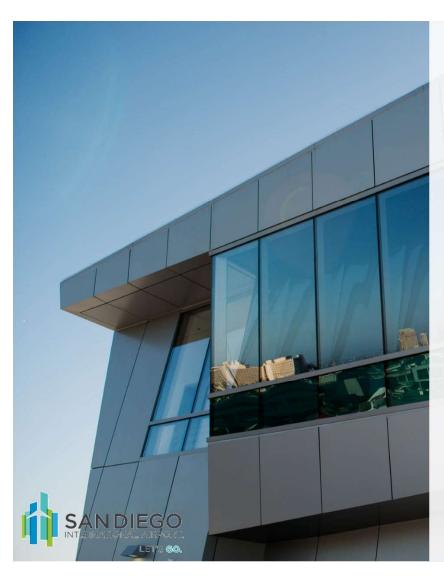




Environmental Updates

- 1. Current VCIP expires on 12/31/2021
- Need to consider next iteration of GT environmental initiatives.
- 3. Must be aligned with the GTAC Collaborative Framework Document and the SAN Clean Transportation Plan
- 4. Also guided by CA State efforts CARB
- 5. Focus on equity across modes
- 6. Looking to technology solutions
- 7. GT understands the dire economic straits of the transportation industry due to the pandemic.
- 8. This will be a long-term recovery.
- 9. Collaboration with industry partners will be a a primary focus.
- 10. Work will begin in April 2020.



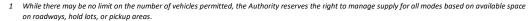


All of our sincere Thanks for your efforts!



Level Playing Field Issues

	15 1 16 16 13 3 4 6 3	Requirements are Similar			Differences Exist	
No.	PERMIT REQUIREMENTS	TAXI	TNC	VFH	CHARTER	
1	Regulated by	MTS	CA PUC	CA PUC	CA PUC	
2	Airport Permit Required	Each Vehicle	Company	Each Vehicle	Each Vehicle	
3	Total Authorized Companies	No Limit	10	9	No Limit	
4	Total Vehicles ¹	No Limit	No Limit	No Limit ²	No Limit	
5	Vehicle	Commercial	Private	Commercial	Commercial	
6	Vehicle Age ³	Not Specified	Less than 10 years	Not Specified	Not Specified	
7	Vehicle Inspections	Older than 7 years	Older than 7 years	Older than 7 years	Older than 7 years	
8	Driver Background Checks	Yes	Yes	Yes	Yes	
9	Driver "Known Terrorist" Check	Yes	Yes	Yes	Yes	
10	Driver "Sex Offender Database" Check	Yes	Yes	Yes	Yes	
11	Driver DMV Check	Yes	Yes	Yes	Yes	
12	Airport Driver Badge	No	No	No	No	
13	Sherriff's Placard	Yes	No	No	No	
14	Company Driver Identification	Yes	Yes	Yes	Yes	
15	Trade Dress	Yes	Yes	Yes	Yes	
16	GHG Requirements	Yes	Yes	Yes	Exempt ⁴	
17	Vehicle Conversion	Yes	Yes	Yes	Yes	
18	Trip Fees/Permit Fees	Per Trip	Trip Fee - P/U & D/O 5	Per Trip	Annual Fee	
19	Insurance - Worker's Comp	Yes	Yes	Yes	Yes	
20	Insurance - Commercial Liability ⁵	\$350,000	\$1,000,000	\$1,000,000	\$750,000	
21	Insurance - Auto Liability 5	\$350,000	\$1,000,000	\$1,000,000	\$750,000	



- 2 There is no limit to the number of VFH vehicles that may be permitted, but there are limits on the level of YoY fleet size increases.
- 3 Vehicle age requirement to be removed from Authority Code if approved at December 3, 2020 Board meeting. MTS has already removed this requirement for Taxicabs.
- 4 The Charter mode has been exempt from Vehicle conversion and GHG requirements due to the lack of suitable, multi-passneger, luxury vehicles that meet the Airport requirements.
- 5 Currently, only TNCs are charged trip fees for both pickups and dropoffs.
- 6 There are existing insurance requirement differences between Taxis and TNCs. These different requirements result in significantly higher per vehilce insurance costs for Taxi permittees.

