Briefing Material

Demand/Capacity and System Scenarios

Regional Aviation Strategic Plan

Airport Advisory Committee
RASP Subcommittee

September 10, 2009

Revised Draft
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RASP Project Overview

Projected Work Plan Culminating in mid-2010

Phase I
Data Gathering and Model Development
March – Oct 2009

Phase 2
Evaluation of Concepts and Strategies
Fall 2009 – Spring 2010

Phase 3
Regional Aviation Strategic Plan
Spring – Fall 2010

Project management and coordination
Stakeholder outreach support
Task-specific documentation and deliverables
Near-term Schedule and Technical Objectives

Scenario Identification and Confirmation Process

June
- Complete strategic assessment
- Identify enhancement “strategies”
- Internal Team Workshop

July
- Develop draft scenarios
- Prepare demand / capacity analyses
- SDCRAA Workshop (7/1)
- SANDAG coordination (7/17)

August
- Assess regional demand characteristics
- Identify and refine scenarios
- SANDAG briefing (8/6)
- City Airports briefing (8/7)
- County Airports briefing (8/7)
- Ad Hoc Committee (8/31)
- RASP Subcommittee (9/10)

Demand Model Development
Near-term Schedule and Work Plan

Project Is On Schedule; Phase II to Be Initiated in the Fall

SCHEDULE MILESTONES
- Ad Hoc Meeting
- RASP Subcommittee Meeting
- Task Deliverable / Working Paper

PROJECT PHASES
- Phase 1
- Phase 2

2009
- June
- July
- August
- September
- October
- November
- December

2010
- January
- February
- March

Airport System Capacity
Demand Model
Airport System Baseline
Scenarios
Alternative System Concepts

Phase 1 Milestones:
- 3
- 3

Phase 2 Milestones:
- 4
- 4
- 5
- 5

Phase 1:
- Scenarios

Phase 2:
- Alternative System Concepts

Regional Aviation Strategic Plan • RASP Subcommittee
Revised Draft September 10, 2009
Factors Affecting Aviation and Surface Capacity

Funding, Policy, and Political Factors

- **Surface Transportation Authorization (Expires 9/30/2009)**
  - Highways and public transportation likely to receive increases when program reauthorized
  - Greenhouse Gas (GHG) emissions and energy security likely to be important criteria, offers opportunity for projects with net benefits to overall emissions

- **Aviation Transportation Authorization (Expires 9/30/2009)**
  - Airports likely to receive marginal increases in formula-based AIP funding
  - Passenger Facility Charge (PFC) increase from current ceiling of $4.50 possible (likely range $6.00 - $7.00)
  - Discretionary federal funds possible given FACT-2 and upcoming FACT-3 report

- **FAA Rates and Charges Policy**
  - FAA rule provides greater pricing flexibility for congested airports
  - Provides the Authority with enhanced ability to incentivize GA to alternate facilities

- **Economy recovery/stimulus funds**

- **FAA congestion management**
  - FAA historic inability to mandate change
  - Risk of FAA establishing slots and loss of Authority control as demand nears capacity

- **Public perceptions**
  - Strong local concerns (e.g. cargo at Brown Field)
  - NIMBY
  - Perceptions about Mexico and use of Tijuana
  - Unconventional ideas still exist (Off-shore airport, airport in the South Bay, etc.)

- **Political perceptions and “commitments”**
  - No consensus that SDIA will reach capacity
  - Sensitivities to past planning efforts, such as Site Selection
  - Local political commitments
Factors Affecting Aviation and Surface Capacity

**Surface and Rail Initiatives**

- **SANDAG Regional Transportation Plan**
  - 2030 plan of County projects part of federal, state, and local surface transportation process
  - Scenario based, depends on policies and funding over the 2010-2030 period
  - SDIA / I-5 Connection
  - Improve access to SDIA air cargo facilities

- **California High Speed Rail (HSR)**
  - Potential for HSR to free up capacity at SDIA by alleviating some short-haul demand
  - The proportion of diverted SDIA traffic depends on the location and quality of connections in both San Diego and Los Angeles; Ontario is common to alternatives being considered
  - San Diego connection part of Phase II project, post-2020 prospects uncertain
  - Expensive, although minimal airport exposure
  - HSR Authority conducting a special study for SANDAG; considering alignments to connect to TIJ along either I-5, I-805, or SR125; report to be completed in the near-term

- **Los Angeles to San Diego (LOSSAN) rail improvements**
  - Long-range plan for the San Diego county portion of the LOSSAN rail corridor
  - Offers prospects of better SDIA access, especially for northern parts of the County
Base Case Forecast Activity

Demand Forecasts Provided to RASP Team January 2009 (Updated June 2009)

- “Unconstrained” activity, which assumes there are no physical, regulatory, environmental, political or other impediments to aviation activity growth
- Assumes existing and/or approved facilities, policies, and regulations
  - No new runways or other major facilities
  - Modest facility improvements, such as hangar and apron enhancements
- Use of “Baseline” versus “High” scenario
- All airports meet FAA design standards for most general aviation aircraft; SDIA and Brown Field can also accommodate most air carrier-type aircraft; pavement strength limitations on Brown Field runway

Source: San Diego County Regional Aviation Strategic Plan Aviation Demand Forecasts, Landrum & Brown, Inc., December 2008; Revised June 2009.
Base Case Projects / Improvements

Specific San Diego International Airport and Surface Improvements to be Considered

- **San Diego International assumptions**
  - Accommodation of existing user groups (corporate GA, air cargo, etc.)
  - Facility constraints “cap” activity 2020 - 2030
  - Continued congestion on Harbor Drive
  - Continued prohibition on departures 11:30 pm - 6:30 am

- **Capacity enhancements and other projects underway to serve +3M population base**
  - 10-gate addition to T-2 West and elevated curb
  - Intermodal Transit Center, rental car, and public parking on the north side
  - *Destination Lindbergh*

- **Planned surface improvements identified in SANDAG's Regional Transportation Plan (RTP) currently under evaluation:**
  - HOT Lane construction on major north-south freeways including I-5, I-15, and I-805
  - HOV Facility construction on SR 52, 78, 94, and 125, including HOT Lane on SR 52
  - Roadway capacity improvements throughout the San Diego County roadway network
  - Goods movement projects including specific rail, maritime, border crossing, roadway, and SDIA truck access improvements

- **Commuter rail, bus rapid transit, and rapid bus transit improvements**
  - Upgrades to existing transit services in San Diego County including expanded route coverage, bus frequencies, and connections
  - Mid-City Rapid Bus (SDSU to Downtown)
  - Mid-Coast Light rail Transit (Old Town, UCSD, to University Towne Centre (UTC))
  - Otay Bus Rapid Transit (Otay Mesa - Downtown)
  - Sprinter Rail (Oceanside to Escondido)
SDIA is one of the faster growing airports in the region.

Annual Passenger Enplanements
Southern and Baja California Airports

<table>
<thead>
<tr>
<th>Year</th>
<th>SDIA</th>
<th>LAX</th>
<th>BUR</th>
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Sources: Jacobs Consultancy, based on T100, Census, Bureau of Economic Analysis, August 2009.

Note: TIJ data only available from 2001-2008; enplanements estimated to be 50% of total passengers.
Regional Aviation Demand Characteristics

San Diego MSA Experienced Higher Than Average Growth in Income and Aviation Activity

Indexed Growth
San Diego Metropolitan Statistical Area (indexed to 1990)

Compounded Annual Growth Rate
(1998-2007)

- Population: 0.9% (San Diego MSA), 1.1% (LA CSA), 1.0% (U.S. Average)
- Real GDP*: 4.2% (San Diego MSA), 3.5% (LA CSA), 2.7% (U.S. Average)
- Income: 5.4% (San Diego MSA), 5.1% (LA CSA), 6.0% (U.S. Average)
- Enplanements: 1.4% (San Diego MSA), 1.7% (LA CSA), 3.0% (U.S. Average)

Sources: Jacobs Consultancy, based on Landrum & Brown analysis, FAA Terminal Area Forecast, Bureau of Economic Analysis, August 2009.

Notes: Real GDP CAGR is for 2001-2006. San Diego MSA lines to SD County boundaries.
SDIA growth is constrained by the single-runway airfield which can support about 286,000 annual aircraft operations.

At 286,000 annual operations, airfield delays will prohibit further growth in operations.

2030 forecast demand exceeds “constrained” airfield capacity by approximately 25,000 operations.

2030 forecast demand is less than the estimated airfield capacity by approximately 50,000 operations.

Unrestricted accommodation of SDIA demand not possible at McClellan-Palomar given runway length requirements.
286,000 annual aircraft operations equates to approximately 14.2 million passenger enplanements which generally corresponds to 2030 forecast demand.

2030 forecast demand exceeds “constrained” terminal capacity.

Capacity estimation assumes 60-gate terminal facility.

- 2030 forecast demand is below the terminal capacity by 25,000 enplanements.
- Although McClellan-Palomar terminal facilities could be expanded to accommodate 120,000 enplanements, this would not provide enough capacity to accommodate the regional demand.
Capacity Analyses Findings

General Aviation and Air Cargo Capacity Exceeds Forecast Demand

- Combined airfield capacity at all 5 GA airports is well above forecast demand
- Demand will exceed capacity at Gillespie (SEE) by 10,000 operations in 2030; capacity significantly exceeds demand at all other facilities
- Forecast demand exceeds existing facilities, but sufficient vacant land is available for construction of additional facilities

- Land area at SDIA is operating at 70-75% of capacity
- Existing cargo land area is sufficient to accommodate forecast demand
Factors related to accommodating commercial service, in addition to runway length, include: runway strength, airfield design standards, fleet mix, ability to lengthen runway, political and/or community opposition, etc.
System Optimization Toolkit

Potential Change in Airport Capability and/or Capacity

- **Runway upgrade or extension**
  - Enhance runway length to accommodate larger aircraft types or serve more distant markets
  - Enhance runway capability (FAA design criteria, pavement strength, etc.) to accommodate larger / heavier aircraft types

- **Passenger terminal development**
  - Enhance terminal facilities to accommodate higher levels of passenger demand
  - Construct new passenger terminal facilities to accommodate commercial activity (w/ Part139)

- **Cargo facility development**
  - Enhance cargo facilities to accommodate higher levels of cargo demand
  - Construct new cargo facilities to accommodate cargo activity

- **GA facility development**
  - Construct additional GA facilities to accommodate additional based and/or itinerant demand
  - Upgrade GA facilities (enhance apron pavement strengths, high-end fixed base operator, etc.) to attract and accommodate more advanced users

- **NAVAIDS / NextGen technologies**
  - NextGen could increase VFR capacity by 20% and IFR over 40%
  - Capacity gains achieved through reduced separation buffers and reduced runway occupancy times
  - Relatively cost effective enhancements

- **On-airport access improvements**
  - Enhance access roadways and parking facilities to accommodate higher levels of passenger, employee, and cargo demand
  - Construct new roadways and parking facilities to accommodate intended users and development programs
Construct facilities and implement operating policies as specified under FAR Part 139 to accommodate commercial passenger or cargo activity

Multiple considerations
- Facility construction to meet FAA design standards
- Policy and operational requirements (i.e., security)
- Operations and maintenance (O&M) costs

Cost to meet FAA airport design standards vary substantially
- Montgomery and Gillespie would need improvement to accommodate regional jets
- Brown Field has design standards in place, but runway would need to be strengthened
- Montgomery has appropriate runway and taxiway separation, but may require relocation of other facilities

Community and political opposition are key factors

Rough Order of Magnitude Part 139 Cost Estimate

<table>
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<tr>
<th>Cost Category</th>
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<td>General facility construction ($ millions)</td>
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<td>Security equipment</td>
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<td>ARFF facilities and equipment</td>
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<tr>
<td>Operational improvements</td>
<td>$0.5</td>
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<tr>
<td>Total</td>
<td>$9.0</td>
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<tr>
<td>Airport layout and design standards</td>
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</tr>
<tr>
<td>Staffing, O&amp;M costs ($ millions/annually)</td>
<td>$1.0</td>
</tr>
</tbody>
</table>
System Optimization Toolkit

Potential Federal, State and/or Local Aviation Initiatives

- **Congestion management (locally initiated)** – promote efficient runway use by optimized pricing (depending on goals)
  - Alter rates/charges by user type
    - New FAA policy explicitly permits blended landing fee (per operation and weight-based fee)
    - Better pricing could encourage more flights in larger aircraft and greater passenger throughput
    - Requires airfield cost-allocation study and consultation with users
  - Induce traffic to other airports
    - Lower fees at alternatives to SDIA
    - Facility improvements at alternative airports to attract GA and possibly commuter traffic
    - Lack of a consolidated airport authority hinders an integrated pricing and facility strategy

- **Slot control (Federal management)**
  - FAA placed “cap” on operations across all airport activity in case of severe delays (in future)
  - Freezes existing operations “in place”, then places USDOT/FAA at the center of managing airport operations
  - Preferable to use local congestion management tools to optimize capacity to meet demand

- **Possible Enhancement of Tijuana Airport for U.S.-based travelers**
  - Public-private partnership for a cross-border terminal offers possibility of better access to Tijuana Airport
  - Customs, security and ease of landside connections will be important criteria for success
  - Surface transportation access would need to be carefully examined
System Optimization Toolkit

Potential Changes to Surface Infrastructure

- Improve access (link) between airports and regional surface system
  - Enhance capacity via traffic control signals, turn lanes, road widening, etc.
  - Constraints – available ROW, environmental approvals, affected communities/neighborhoods
  - Costs vary based on extent of improvement

- Enhance the regional system
  - Improve access via multimodal regional system infrastructure improvements
  - LOSSAN Rail, Transit First, San Diego BRT, High Speed Rail, Corridor System Mgt Plans
  - Constraints – community support, funding, prioritization or projects and programming, etc.

- Improve transit services including expanded route coverage, frequencies, and connections

- Remote terminals / “HOV” lanes
  - Express bus service between airport and remotely located passenger terminal/station or parking facility (Van Nuys FlyAway, Logan Express, SFO Marin Airporter)
  - Potential: parking at McClellan-Palomar bus to SDIA; park at Brown Field bus to Tijuana
  - Financial subsidies may be required

Other Regional Examples

LAX Flyaway station
Logan Express
Commercial Passenger Optimization Scenario

Includes Four Sub-scenarios for Passengers

- **Scenario 1 – Lindbergh-focused scenario**
  - Maximum build-out of SDIA focused solely on air carrier passenger service
  - Prioritize passenger levels of service; enhance air service options/markets; enhance surface access
  - Implementation via pricing, Authority policy, and focused facility construction

- **Scenario 2 – Maximum utilization of other commercial service capable airport(s)**
  - Incentivize regional jets and other capable air carrier aircraft to operate from McClellan-Palomar
  - Implementation via incentives, pricing, and new/enhanced facilities at McClellan-Palomar
  - Could include implementation of another FAR Part 139 airport in the region

- **Scenario 3 – Maximum utilization of other system airports**
  - Incentivize air carrier, air cargo, and corporate GA to operate from surrounding airports preserving SDIA capacity for air carrier service
  - Implementation via new/enhanced facilities at existing GA airports

- **Scenario 4 – Increased utilization of Tijuana**
  - Facilitate use of Tijuana International Airport or implementation of cross border terminal
  - Implementation via incentives, SDIA- or Tijuana-based pricing, new/enhanced terminal facilities at Tijuana
  - Requires improved border access / crossings; FAA and numerous other Federal approvals; and resolution of U.S. / Mexican ownership/operation issues
General Aviation Optimization Scenarios

Focus is to Free Up Capacity at SDIA and Optimize Existing Assets

GA 1  SDIA corporate GA accommodated at single nearby reliever facility

GA 2  SDIA corporate GA accommodated at multiple outlying airports

Flight training accommodated at multiple outlying facilities; Brown and Ramona best options given facilities, available capacity, available land, and geographic location

Notes: Gillespie has runway length and approach restrictions; Montgomery has runway length restrictions; geographic and airspace complications restrict flight training options.
Air Cargo Optimization Scenarios

Primary Focus is Freeing Capacity at SDIA

**AC 1**
SDIA-based air cargo accommodated at a single **alternative facility** (Brown Field only existing capable facility; Montgomery and Gillespie have constraints to runway expansion)

**AC 2**
SDIA-based cargo accommodated at **multiple outlying airports**

No air cargo movement at County airports; all air cargo trucked into and out of the region [LA, Mexico, other]
### Surface and HSR Optimization Scenarios

**Further Definition Requires Coordination with SANDAG (Ongoing)**

- California HSR – Integration of HSR and Southern California airports could create short-haul and connecting options depending on final design
- Draft EIS assessing stations at Ontario Airport, Downtown Los Angeles, and Downtown San Diego
- Final EIS not initiated; additional station combinations under consideration
- Combination of stations that would most impact the RASP:
  - **Passes LAX (no Station at Norwalk)**:
    - Stations at LA Union Station and downtown San Diego
    - Stations at LA Union Station and SDIA
  - **Into LAX (Station at Norwalk)**:
    - Stations at LAX and downtown San Diego
    - Stations at LAX and SDIA
    - Into downtown San Diego
    - Into SDIA

**Surface scenarios driven by SANDAG 2030 Regional Transportation Plan (RTP) funding**

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<tr>
<th>Revenue Constrained</th>
<th>Expected Revenue</th>
<th>Unconstrained Revenue</th>
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<td>$18 billion on all projects</td>
<td>$32 billion on all projects</td>
<td>$45 billion on all projects</td>
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<td>$12 billion on Highway</td>
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<td>$35 billion on Highway</td>
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<tr>
<td>$6 billion on Transit</td>
<td>$9 billion on Transit</td>
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Note: Station at Norwalk will provide smooth connection to LAX
Appendix – Supplemental Information
Note: Tijuana International Airport not located in San Diego County.
Study Area – Ground Transportation Network

## Baseline Facilities and Operations Data

### Airport Activity Statistics

<table>
<thead>
<tr>
<th>Airport</th>
<th>San Diego International</th>
<th>McClellan-Palomar</th>
<th>Montgomery Field</th>
<th>Brown Field Municipal</th>
<th>Gillespie Field</th>
<th>Ramona</th>
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<tr>
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<td><strong>Forecast 2015</strong></td>
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### FAA/NYSA Designation

- **San Diego International**: General Aviation
- **McClellan-Palomar**: General Aviation
- **Montgomery Field**: General Aviation
- **Brown Field Municipal**: General Aviation
- **Gillespie Field**: General Aviation
- **Ramona**: General Aviation

### Airport Facilities

- **General Aviation**
- **Regional GA**

### Airport Acreage

- **236 acres**

### FAA Airport Reference Code

- **B-1**

### Runway Data

- **6/24 - 272**: 10/28 - 272
- **6/26 - 5,011**: 10/27 - 2,475

### Instrument Approach

- **None**

### Notes and Sources

- **National Plan of Integrated Airport Systems &专业化**: Not Applicable
- **Regional Aviation Strategic Plan - Aviation System Plan**: 2005
- **Regional Aviation Strategic Plan - Aviation System Plan**: 2009
- **Regional Aviation Strategic Plan - Aviation System Plan**: 2014

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### Regional Aviation Strategic Plan

- **Tijuana-Rodriguez**: TJ
- **N/A**: Not Included in Regional Plan

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**DRAFT**
Strategic Assessment Findings

Airports That Should be Considered For Additional Uses/Opportunities

- McClellan-Palomar Airport
  - Existing FAA certifications, proximity to population base, terminal infrastructure, and potential for runway extension
  - Proximity to population base, access to light rail, and availability of developable land to accommodate new user groups

- Gillespie Field
  - Proximity to population base, existing runway length, and availability of developable land for terminal or cargo facilities

- Brown Field Municipal Airport

Note: Tijuana International Airport not located in San Diego County.
Strategic Assessment Findings

Airports That May Be Considered For Additional Uses/Opportunities

- **Proximity to existing facilities, projected population growth, and planned roadway improvements; potential environmental constraints may restrict development**

- **Destination Lindbergh established that SAN will reach capacity before 2030**

- **Proximity to population base and existing infrastructure; intergovernmental agreement required for cross border operation**

Note: Tijuana International Airport not located in San Diego County.
Strategic Assessment Findings

Airports That Should Not be Considered For Additional Uses/Opportunities

Note: Tijuana International Airport not located in San Diego County.
### Strategic Assessment Summary Matrix

#### Commercial Service
- San Diego International (SAN)
- McCarren-Palermo (MCO)
- Montgomery Field (MKG)
- Brown Field Municipal (BGR)
- Gillespie Field (SCE)
- Ramona Municipal (RMA)
- Granadilla Municipal (ORA)
- Fallbrook Community (LST)
- Borrego Valley (BRO)
- Ocotillo (179)
- Aguadilla (152)
- Jacumba (JAB)
- Tijuana-Ensenada (TIJ)

#### FAA Designated Releivers
- Santee (SAN)
- La Jolla (LJA)

#### General Aviation
- San Diego County
- San Diego County
- San Diego County
- San Diego County
- San Diego County
- San Diego County
- San Diego County
- San Diego County
- San Diego County
- San Diego County

#### Not in FAA NPIAS
- U.S. Marine Corps

### Facility Assessment/Accommodation of Current Users

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<td>Airport-Facility</td>
<td>Attachment</td>
<td>Attachment</td>
<td>Attachment</td>
</tr>
<tr>
<td>Instrument Approach</td>
<td>Attachment</td>
<td>Attachment</td>
<td>Attachment</td>
</tr>
<tr>
<td>Passenger Terminal Building</td>
<td>Attachment</td>
<td>Attachment</td>
<td>Attachment</td>
</tr>
<tr>
<td>FBO/Corporate Terminal</td>
<td>Attachment</td>
<td>Attachment</td>
<td>Attachment</td>
</tr>
<tr>
<td>Cargo Facilities</td>
<td>Attachment</td>
<td>Attachment</td>
<td>Attachment</td>
</tr>
</tbody>
</table>

### Possible Change In Role?

<table>
<thead>
<tr>
<th>Development Potential</th>
<th>Possible Change In Role?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proximity to Users/Market Base (D)</td>
<td>Possible Change In Role?</td>
</tr>
<tr>
<td>Runway Upgrade (R)</td>
<td>Possible Change In Role?</td>
</tr>
<tr>
<td>On-Airport Land Available for Development (L)</td>
<td>Possible Change In Role?</td>
</tr>
<tr>
<td>Proximity to Highway/Train Station (P)</td>
<td>Possible Change In Role?</td>
</tr>
<tr>
<td>Environmental Concerns (E)</td>
<td>Possible Change In Role?</td>
</tr>
<tr>
<td>Community Concerns (C)</td>
<td>Possible Change In Role?</td>
</tr>
</tbody>
</table>

### Summary

<table>
<thead>
<tr>
<th>Consideration in the RASP</th>
<th>Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Should the airport be considered for additional uses/opportunities to optimize the region's aviation system?</td>
<td></td>
</tr>
</tbody>
</table>

### Notes
- NPIAS = National Plan of Integrated Airport Systems
- The matrix evaluates various airports based on criteria such as proximity, development potential, and environmental concerns.