High Level Themes

- **Access**: Private vehicle is main access mode, but there is market potential for increased transit/shared-vehicle access.
- **Parking**: SAN has fewer spaces/1000 boardings than most peers, but there are always some open spaces at today’s supplies/pricing.
- **Spatial patterns**: A large share of passengers come from homes or hotels within a short ride of the Airport; I-5 north and south corridors are also key.
- **Transit/van mode share**: 9% is consistent with peers.
- **Stakeholder reflections**:
  - Existing transit services could be better, more welcoming, easier to use, and more efficient.
  - Mixed feedback on Flyaway/Remote Terminal potential.
Most Passengers Access SAN by Private Vehicle

- **Resident**:
  - Drove Self: 26%
  - Hotel Shuttle: 5%
  - Taxi: 10%
  - Rental Car: 1%
  - Other: 56%

- **Visitor**:
  - Drove Self: 2%
  - Hotel Shuttle: 6%
  - Taxi: 17%
  - Rental Car: 18%
  - Other: 34%

- **Overall**:
  - Drove Self: 13%
  - Hotel Shuttle: 5%
  - Taxi: 14%
  - Rental Car: 18%
  - Other: 43%
Transit Access

Two-thirds of 992 passengers transfer, half of those transferring do so from the Trolley system.
Parking Occupancy: Day of Week

2013 full year; source: Ground Transportation
Parking Occupancy: Week of Year

2013 full year; source: Ground Transportation
Access Patterns
Overall Travel Patterns

- More than 1/3 of trips within a short ride of airport
- Corridors with existing trolley service account for 20% of passenger home/hotel locations
Passengers Residing in San Diego Area

- I-5 north corridor is biggest single market
- COASTER and Mid-Coast improvements could tap this market more fully
- All other markets – 5-16% of home locations each
Passengers Visiting San Diego Area

- Lodging heavily concentrated near Airport
- Hotel locations highly concentrated within this area
- Biggest shares of reported lodging locations outside the “short trip” zone: I-5 north and I-8 corridors
- Short trips account for nearly 80% of passenger trips.
Downtown is Strongest Travel Market

Biggest opportunities are for enhanced downtown and Mission Beach services!
Reported Hotel Locations

Concentrations near the Convention Center/along Harbor (currently requires a transfer)
Prior Plans
2008 Master Plan: Transit Corridor

Envisioned transit corridor running from new rental car facility/transit center on north side of airport to terminal area.
North County/I-5 Corridor Plans

Mid-Coast Trolley

COASTER Service Expansion

<table>
<thead>
<tr>
<th>Year</th>
<th>Peak Service</th>
<th>Off-Peak Service</th>
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<tbody>
<tr>
<td>Current</td>
<td>~Every 45 minutes (peak direction)</td>
<td>~Every 120 minutes</td>
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<tr>
<td>2018</td>
<td>Every 20 minutes (both directions)</td>
<td>No Change</td>
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<tr>
<td>2030</td>
<td>Every 20 minutes (both directions)</td>
<td>Every 60 minutes</td>
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</table>
Transit Plan II: Flyaway Service Initial Concept
Stakeholder Input
Better Marketing and Passenger Information

- Passenger Information
- Real-Time Arrival Information
- Branding
- Off-Board Vending
Regional Bus Service

- Some stakeholders see potential in Flyaway service
- Early SD Rapid success is instructive – people will use a high amenity branded bus
- Some concern about cost and viability, but open to pilot

Sources: KCET and KPBS
Connection to High-Capacity Transit

Data Source: MTS FY14
Areas of Focus
Key Corridors

The Short Trip and I-5 markets are the largest for visitors and residents respectively.
Rental Car Center Opens New Transit Connections

Proximity to existing stations, planned transit way could create efficient connections between high-capacity lines and terminals.
I-5 Corridor: Flyaway Service

Given the size of the I-5-corridor market, it could be the one to use for a flyaway service pilot but these trips may also be served by Coaster.
Hotel Clusters: One-Seat Rides?

Given higher propensity to take transit among visitors, hotel clusters could be point of focus for enhanced transit service. Tidelands shuttle may have funding opportunity available.