

SFO

San Francisco
International
Airport

San Francisco International Airport



Caltrans Field Academy
May 19, 2015



- 47M+ passengers per year
- 3rd-busiest O/D airport in the United States
- 70% of Bay Area passenger traffic
- 22% of passengers traveling nonstop internationally
- 38 international destinations on 4 continents
- Longest flight: Abu Dhabi, 8158 statute miles in 16 hours 15 minutes (world's 7th-longest)
- 39 passenger airlines (29 foreign) and 9 cargo airlines
- Smallest plane: 50-seat United Express Canadair Regional Jet
- Largest plane: 538-seat Air France Airbus 380

- Gateway to the Pacific Rim, proximity to Silicon Valley
- Population and Demographics
 - ▣ Strong per capita personal income levels derived from an employment base with higher levels of education relative to the state and nation
 - ▣ Key industry clusters create strong travel demand:
 - Information technology and software
 - International business
 - Social and digital media
 - Life sciences and biotech
 - Clean technology
- Premier destination for tourists and business travelers

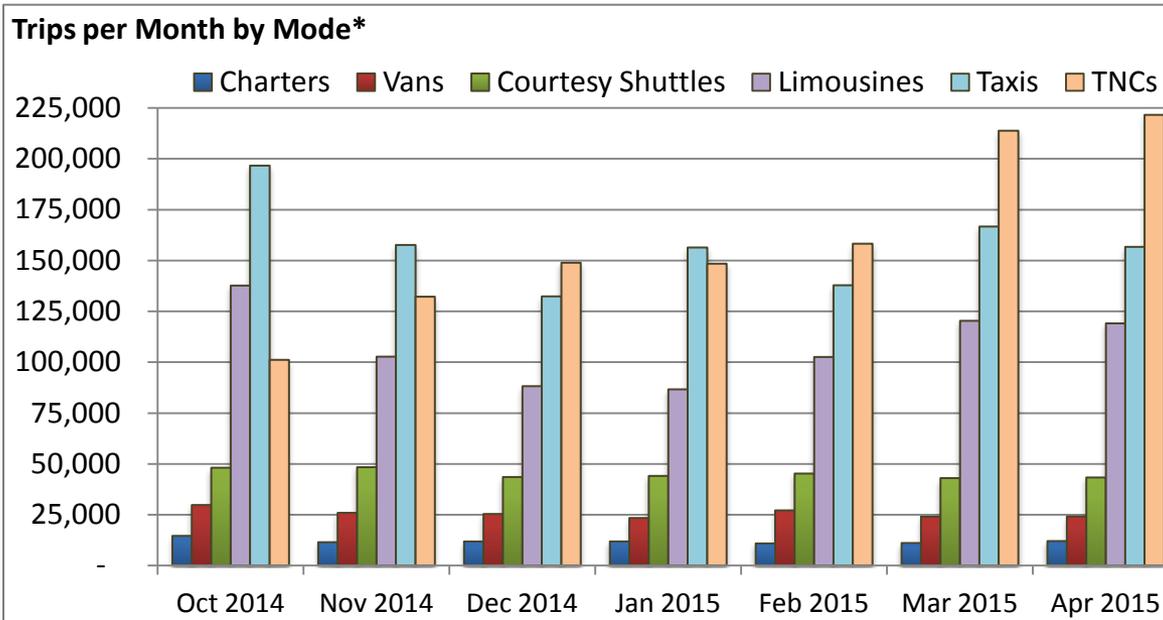
Mode of Airport Access

- 27% private motorist dropoffs
- 12% drive and park
- 12% rental car
- 13% scheduled transit (mostly BART and airporters – 35% BART from parts of the East Bay)
- 11% taxi
- 8% TNC (chiefly UberX and Lyft)
- 7% limousine, including UberBlack
- 10% shared-ride van, hotel courtesy shuttles, charter vehicles
- Rental car customers and many BART riders use Airtrain to reach terminals
- A detailed year-long interview survey of 25,000 departing air passengers at SFO and OAK Airports has just concluded. Detailed information includes breakdowns by trip purpose, residency, local origin point, mode of Airport access, travel frequency, party size, passenger demographics, and additional factors.

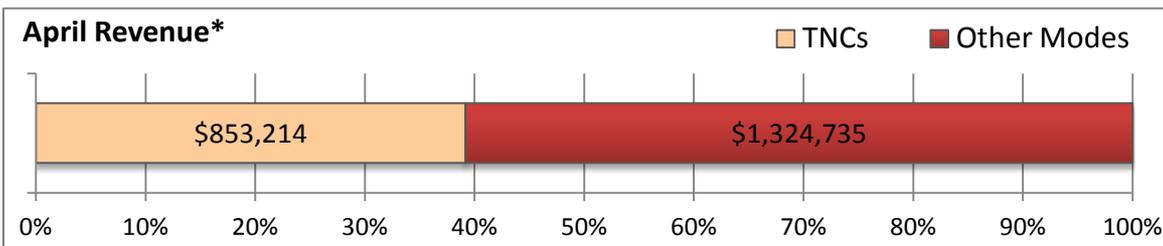
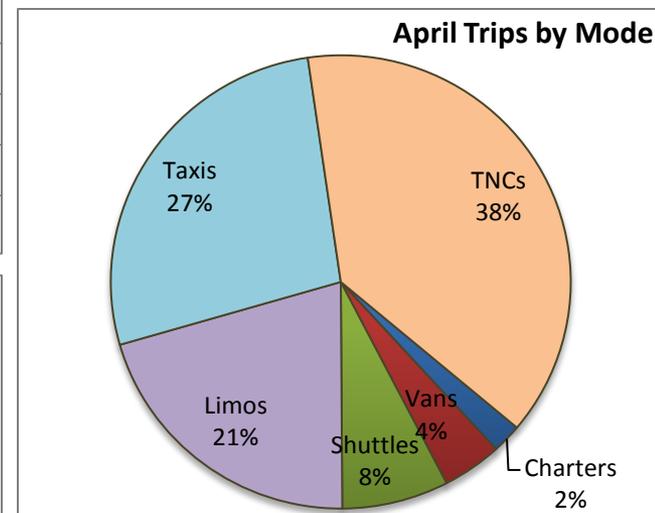
Transportation Network Companies

Highlights:

1. TNC trips continue to increase rapidly, while taxi and limo trips declined slightly from March to April.
2. For the most recent month of available data, 61% of TNC trips were drop-offs vs. 39% pick-ups.
3. For the most recent month of available data, revenue collected from TNC trip fees totaled \$853,214, representing 39% of commercial ground transportation revenue.



All Permitted Ground Transportation Trips	
October	528,044
November	478,387
December	450,272
January	470,848
February	481,949
March	579,092
April	576,984



*Represents billable trips only. Method of trip calculation varies by mode.

- Over 9,000 commercial ground transportation vehicles are inspected and permitted annually at SFO, including all 2,000 San Francisco taxis
- Replacement and enhancement of the Airport's vehicle tracking, billing, permitting and enforcement system is currently underway, to be completed in Fall 2015
- SFO has developed a TNC tracking system that is being shared with other airports

- SFO has the highest percentage of air passengers using shared-ride and hired driver transportation (49%) of any U.S. airport
- Most ground transportation modes can directly access each terminal for pickups and dropoffs
- SFO trip fees do not vary significantly by size of vehicle, so high-capacity buses pay much less on a per-passenger basis
- Shared-ride ground transportation is highlighted on the Airport's website



Clean Vehicle Policy

- Launched in 2000
- SFO leases space for two of the largest CNG refueling stations in Northern California, with two competing firms providing 15 fast-fill hoses to service annual demand of 2.5M gallons
- Clean Energy is sourcing 85% of its CNG from landfills
- Shared-ride van, hotel and parking courtesy shuttle fleets are almost 100% CNG
- About 600 owned and permitted vehicles run on CNG, from autos to buses
- 90% of taxis and 50% of TNC vehicles are hybrid-electric
- Airtrain is electric-powered
- Over 250 electric-powered aircraft ground support vehicles
- Over 140 auto parking spaces have access to EV chargers, many “smart”
- By 2016, SFO will offer “while-you-wait” fast chargers for a fee



Employee Commuting

- Average commute is 19 miles
- Shifting employees to transit, carpools and vanpools is one of the most productive ways of reducing our carbon emissions
- Currently 75% of Airport Commission employees drive alone, 13% take transit, and 12% carpool or vanpool
- The Airport Commission has launched a Transit Credit Initiative to pay employees \$130/month if they relinquish their free parking privilege
- The Airport's 170 tenants are required to offer their employees either pre-tax transit payroll deduction, reimbursement of at least \$80/month in transit commute costs, or a private shuttle to a BART station
- Use of BART by Commission and tenant employees has more than doubled in the two years since BART eliminated the Airport surcharge for employees

5-Year Capital Plan

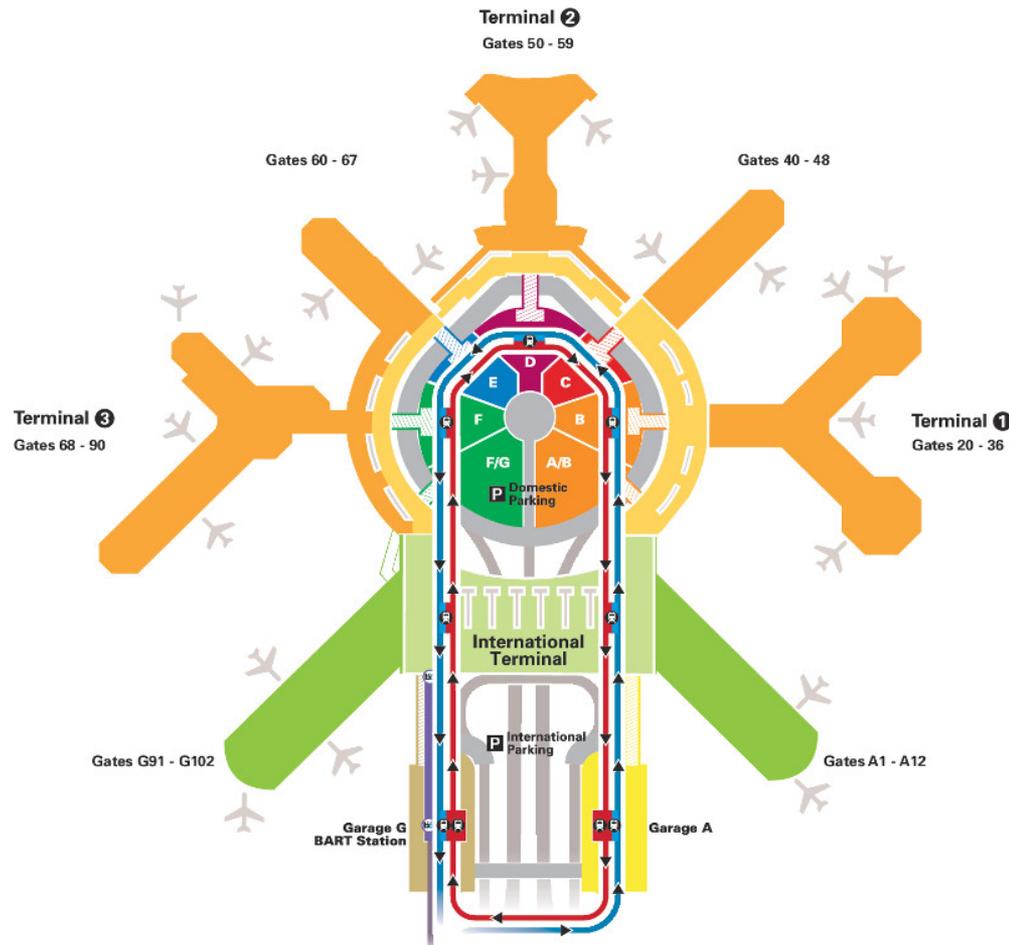
- Capital Plan Drivers
 - ▣ Aging and seismically vulnerable buildings and infrastructure
 - ▣ Current security requirements
 - ▣ Improve the passenger experience by bringing Terminal 2 amenities to the other terminals

- The Capital Plan positions SFO for continued traffic and revenue growth
 - ▣ Projects will be pursued if there is demand and stakeholder support

Cost Center	Five-Year Plan (in millions)	Percent
Terminal	\$ 1,601.8	56.3%
Groundside	504.1	17.7%
Airport Support	389.0	13.7%
Airfield	185.0	6.5%
Utilities	<u>148.9</u>	5.8%
Total	\$ 2,844.0	

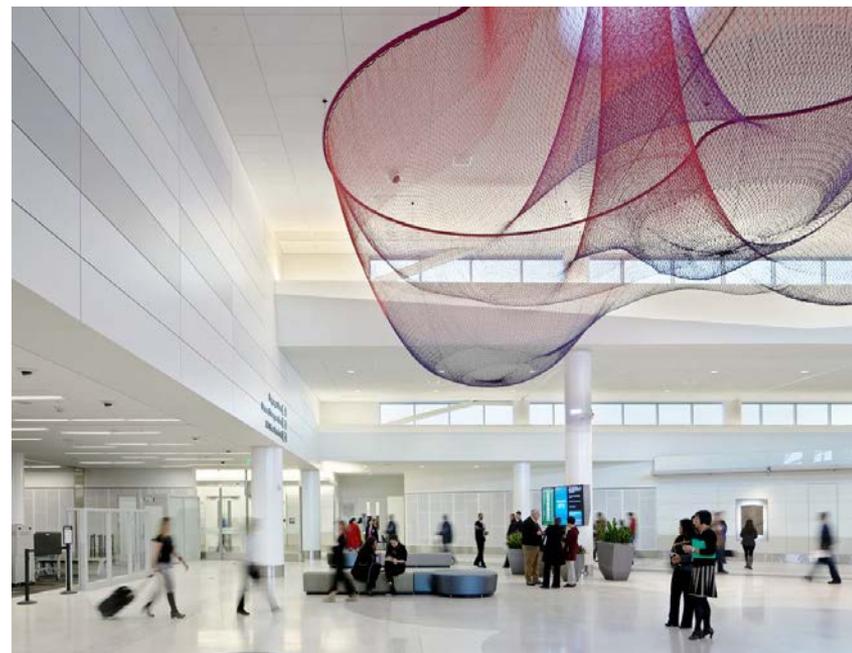
Passenger Terminal Enhancement

- Boarding areas being progressively upgraded with state-of-the-art design and amenities
- Terminal redesigns include HVAC overhauls, natural light, energy efficiency, chargers for electric ground support equipment
- The International Terminal is the world's largest building built on seismic base isolators



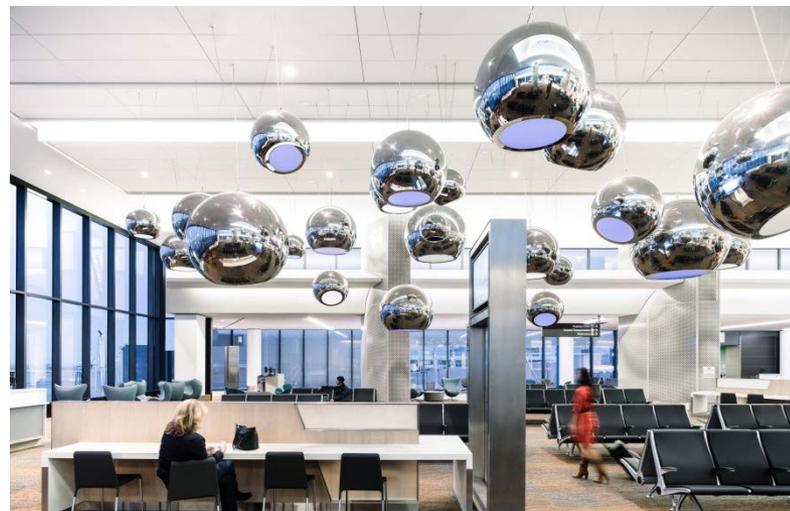
The Terminal 2 Standard

- Terminal 2 Renovation
 - ▣ \$383 million
 - ▣ Design-build project
 - ▣ Opened in April 2011
- Completed on-time and on budget
 - ▣ Highest passenger spend rate
 - ▣ Highest ASQ* terminal score
- Concessions redevelopment plans through 2018
 - ▣ Intended to deliver a higher passenger spend rate Airport-wide



Terminal 3 Boarding Area E Renovation

- Opened January 28, 2014
- Completed on time and on budget
- Expands building footprint by 18,000 sq. ft.
- Improves passenger experience
- Adds concession space
- \$138 million project cost



Terminal 1 Redevelopment Program

→ Terminal 1 Redevelopment Continuing

- \$2.4 billion project budget, \$1.1 billion over next five years
- Complete modernization of Terminal 1 and Boarding Areas B and C
- Carry through the T2 experience to increase passenger spend rate and customer satisfaction
- Provide wide-body swing gates for international flights to meet demand



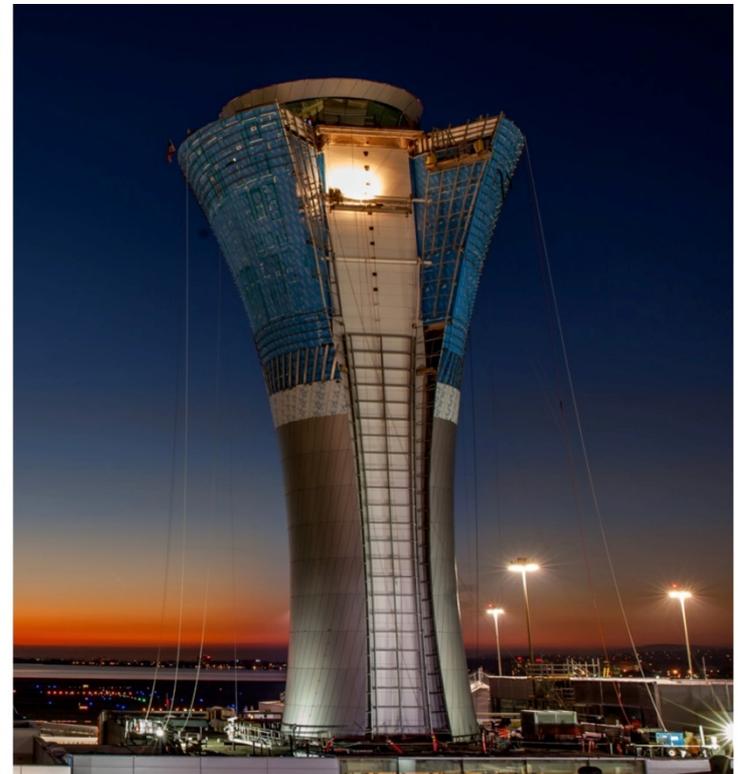
Terminal 3 Redevelopment Program

→ T3 Redevelopment Ongoing

- Program Budget - \$974M
- Complete modernization of Terminal 3
- Carry through the T2 experience to increase passenger spend rate and customer satisfaction
- Enhance airline passenger processing

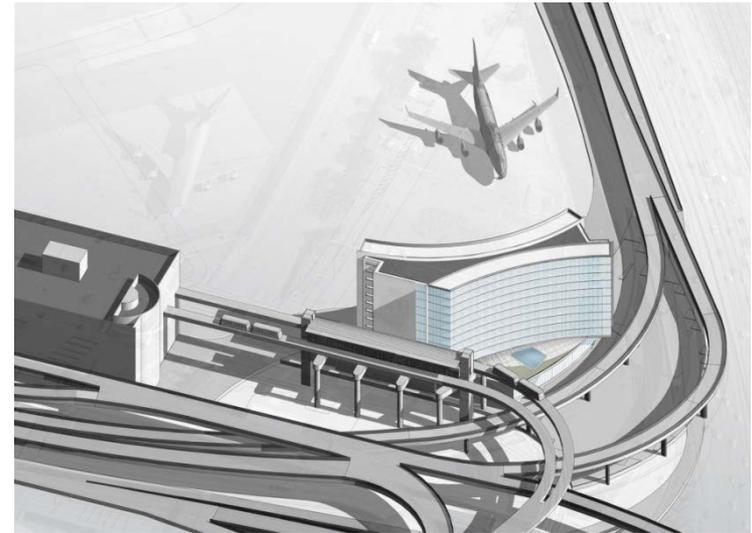


- Air Traffic Control Tower Project Nearing Completion
 - ▣ Secure Connector opened in November 2014
 - ▣ Substantial completion in Spring 2015
 - ▣ FAA fit out complete in Spring 2016
 - ▣ \$33.9M demolition of existing tower



On-Airport Hotel

- 350 room luxury brand hotel
 - ▣ 25,900 sq. ft. meeting space
 - ▣ 14,600 sq. ft. food and beverage space
 - ▣ Fitness center, business center, AirTrain
- \$165 million project budget –
In service by 2019



- New Long-Term Parking Garage
 - ▣ Nearing full capacity
 - ▣ Additional 3,100 long-term parking spaces to handle demand
 - ▣ \$6 million incremental parking revenue in year 1
 - ▣ In service by 2018
 - ▣ Parking Garage - \$72 million



Other Significant Projects

- **\$110M AirTrain Extension**
 - ▣ Extend AirTrain to Long-Term Parking from Rental Car Center
 - ▣ Two additional stations
- **\$73.8M Wastewater Improvements**
 - ▣ New Industrial Treatment Plant
 - ▣ Recycled water distribution pipeline



Redefining Exceptional

*If we made it any nicer,
people wouldn't get on the planes.*



- Roger Hooson, Senior Planner, Landside Operations
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