



ANALYSIS OF
COVID-19'S
IMPACT ON
COMMERCIAL
AIRPORT
OPERATIONS IN
CALIFORNIA





INTRODUCTION

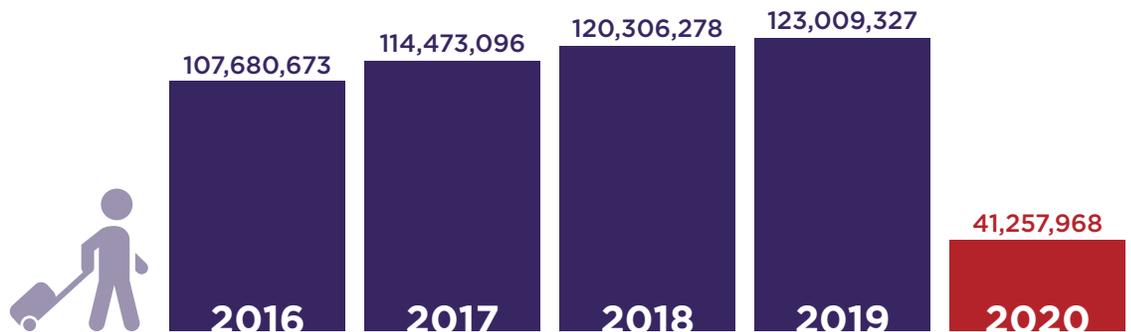
The past twelve months have marked an unprecedented year for the worldwide economy. This includes commercial aviation, which continues to experience a severe disruption in passenger movement, routine operations and infrastructure development. Many of California's airports have implemented acute budget cuts and project suspensions to navigate uncertain financial futures. Nevertheless, throughout 2020, California's airports remained open, supporting activities such as travel for essential workers, goods movement and emergency response.

This report offers enplanement volumes for all 31 commercial service airports in the state, as well as an overview of the growth and dramatic decline of airport activity at 16 of California's airports due to COVID-19. Airports anticipate a long road to recovery and will seek support from regional, state and federal leadership to ensure both rural and metropolitan communities continue to have access to the benefits and services of aviation.



PASSENGER VOLUMES

An immediate result of the COVID-19 pandemic was the dramatic reduction in passenger movement at all 31 facilities. Prior to the pandemic, California passenger enplanements increased by 14.2% from 2016-19. In CY2020, California's airports experienced a 66.5% reduction in overall passenger enplanements. International travel decreased by 68.7% and domestic travel decreased by 64.2% at the 16 participating airports.



2020 PASSENGER ENPLANEMENTS: -66.5%



**Domestic Travel
-64.2%**



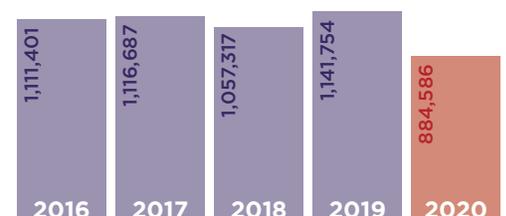
**International Travel
-68.7%**

AIRCRAFT OPERATIONS

Both commercial and general aviation aircraft operations have decreased precipitously from 2019-20 as well. Over the last year commercial aircraft operations, defined as individual takeoffs and landings, have decreased by 46.6% and general aviation operations at commercial airports decreased by 22.5%.



2020 COMMERCIAL AIRCRAFT OPERATIONS: -46.6%



2020 GENERAL AVIATION OPERATIONS: -22.5%

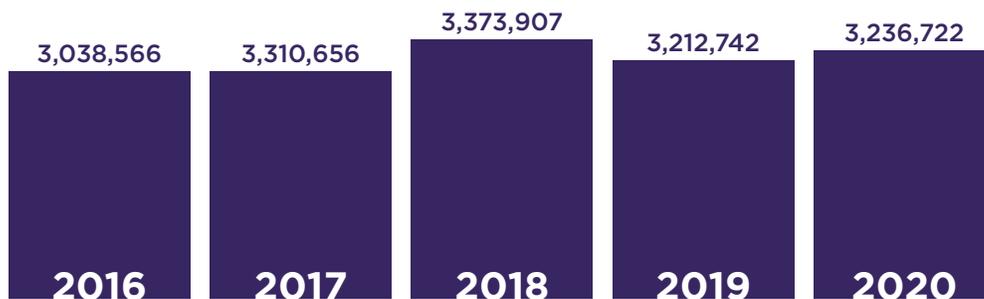




CARGO MOVEMENT



Compared to other airport activities, cargo through air freight has experienced a stable outcome. Stay-at-home orders and increased telecommuting have resulted in the accelerated growth of e-commerce sustaining cargo operations.



LANDSIDE OPERATIONS

Decreased passenger traffic jointly affected landside operations. Airports across the state experienced sizable reductions in parking revenue, on-demand ridesharing and taxi operations. From 2019 to 2020, parking revenue at California's airports dropped by 44.6%. Service from Transportation Networking Companies that experienced a 163.3% growth from 2016-19 and dropped by 65.6% in 2020.





REVENUE FROM PASSENGER FACILITY CHARGES

A significant local revenue source that has been impacted by 2020's decreased passenger numbers is the Passenger Facility Charge (PFC). The PFC was created through the federal Aviation Safety and Capacity Expansion Act of 1990 and imposes a local fee for each enplaned passenger. PFC revenue can be used for projects that preserve or enhance capacity, safety, or security of the national air transportation system; reduce noise resulting from an airport; or provide an opportunity for enhanced competition between or among air carriers and foreign air carriers. From 2019 to 2020, PFC collection in the state of California dropped by almost 52%.



2020 PFC REVENUE: -51.9%

FEDERAL SUPPORT FOR AIRPORTS

The CARES Act provided \$10 billion to airports nationwide for operating expenses, debt service obligations and concessionaire relief. Of that apportionment, California's airports, commercial and general aviation, received over \$1 billion. The additional COVID relief package passed in December 2020 provided \$2 billion to airports nationwide. Of this funding, California's commercial airports received almost \$245 million and over \$26 million of that amount was distributed to concessionaires.

As we move into 2021, we strongly encourage continued financial consideration for airports nationwide. Airports applaud the quick action of the Biden Administration to pass an additional COVID relief bill including \$8 billion for airport operations nationwide. In California, bonded indebtedness totals over \$18 billion combined at the 16 airports surveyed, paying over \$1.2 billion in debt service annually. These facilities will continue operating over the next year with limited passenger movement, therefore decreased revenues. Airports are critical infrastructure that support connectivity throughout the nation and the world, therefore we ask Congress for continued support of this essential resource.



**Data for this report was aggregated
through survey results from the following 16 airports:**

Buchanan Field Airport
Charles M. Schulz - Sonoma County Airport
Fresno Yosemite International Airport
Hollywood Burbank Airport
John Wayne Airport, Orange County
Long Beach Airport
Los Angeles International Airport
Monterey Regional Airport
Norman Y. Mineta - San José International Airport
Oakland International Airport
San Diego International Airport
San Francisco International Airport
San Luis Obispo Regional County Airport
Santa Barbara Airport
Santa Maria Airport
Stockton Metropolitan Airport

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