

Appendix G : YLW Leakage Study 2016



InterVISTAS

a company of Royal HaskoningDHV

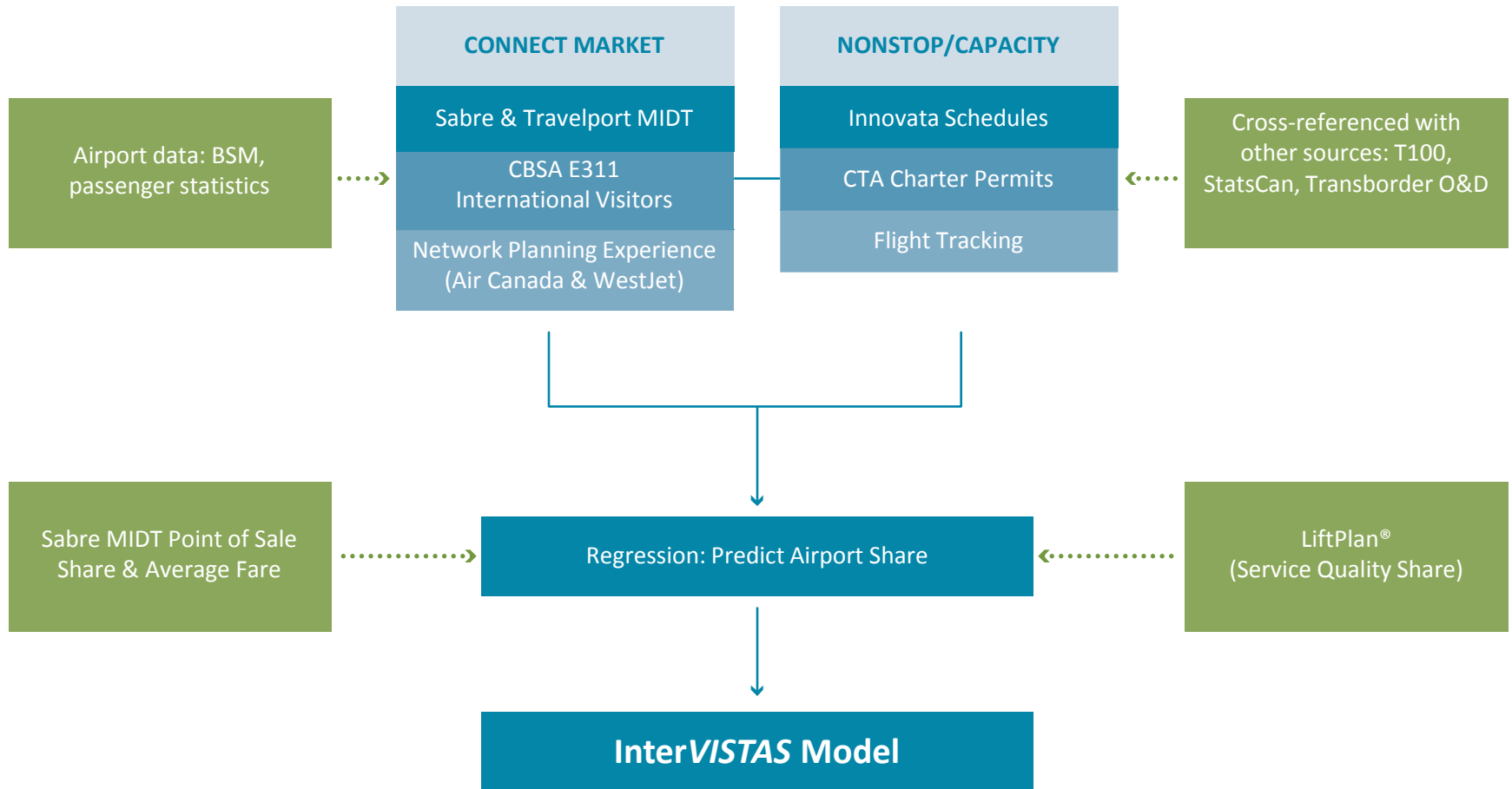
YLV Leakage Study 2016

March 2016

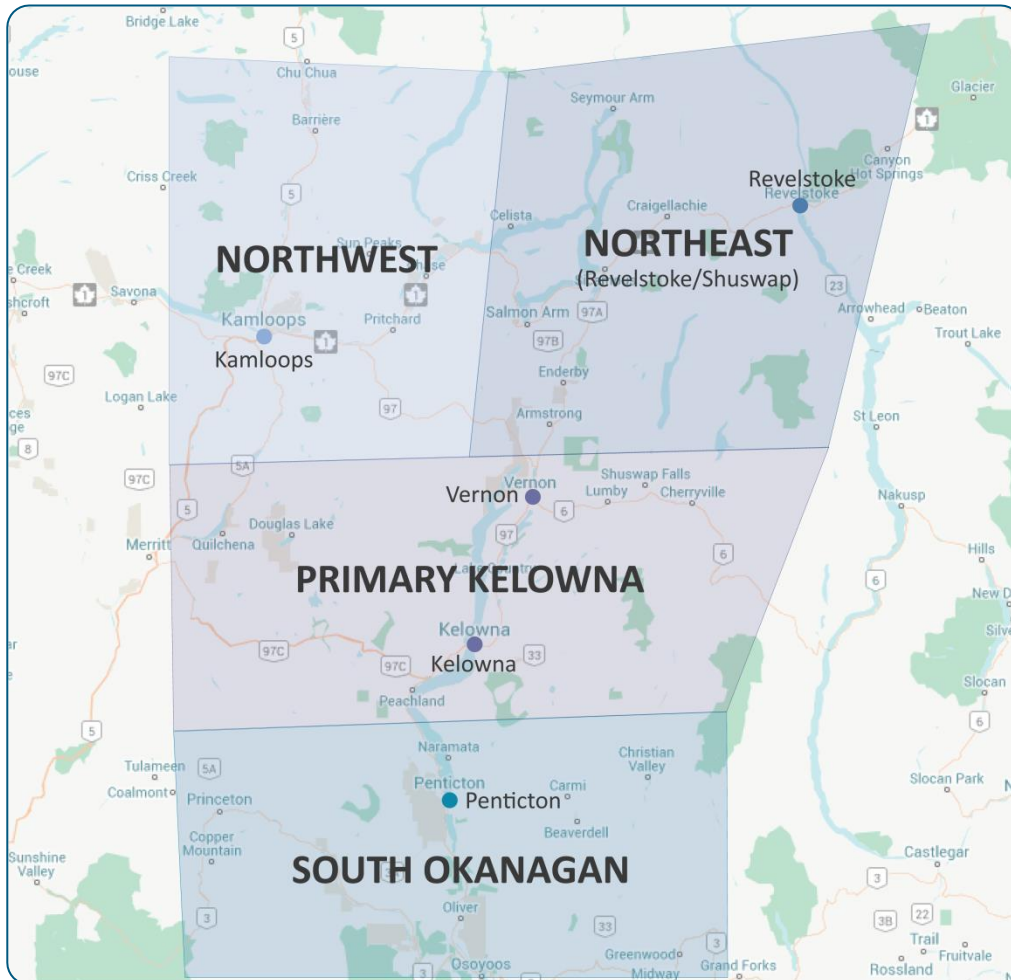
Market Size Methodology

- + Market sizes have been estimated by the InterVISTAS Market Research & Analysis group.
- + The following data sources are used as inputs when estimating Kelowna area origin-destination markets sizes:
 - Data representative of the major Global Distribution Systems (GDS) booking information.
 - Schedule carrier capacity from Innovata.
 - Airport site statistics.
 - Data from national statistics agencies (e.g. Statistics Canada, US Department of Transportation etc.).
- + Estimates of the GDS share of total traffic by point-of-origin, country and carrier are constructed and these figures are applied to the specific itineraries in the MIDT and supplemental GDS data to estimate the total traffic for each itinerary record. The itineraries are then summarized to provide the appropriate origin-destination market size estimates.
- + Market sizes were derived from 2015 bookings data.
- + Markets were adjusted for seasonality using historical point-of-sale estimates.
 - Summer market sizes are based on April – September averages.
 - Winter market sizes are based on October – March averages.

Leakage Model



Catchment Area



- + The Kelowna Airport catchment area has been divided into Primary and Secondary components.
- + The primary catchment area includes the region around Kelowna.
- + The secondary catchment areas includes passengers travelling to/from the Northwest, Northeast and South Okanagan.

Airline Seat Capacity Considerations

- + To provide context when review the market size figures, the table below provides a general “rule of thumb” for passenger volumes required to support service for a range of aircraft types.

Aircraft		Weekly Outbound Frequency	Annual Seats	Annual Passengers (assuming 80% load factor)	Passengers Per Day Each Way (assuming 80% load factor)
Type	Average Seat Configuration				
Small Regional Turboprop	18	1	1,872	1,498	2
	18	3	5,616	4,493	6
	18	5	9,360	7,488	10
	18	7	13,104	10,483	14
Small Regional Jet	50	1	5,200	4,160	6
	50	3	15,600	12,480	17
	50	5	26,000	20,800	29
	50	7	36,400	29,120	40
Large Regional Jet/Turboprop	75	1	7,800	6,240	9
	75	3	23,400	18,720	26
	75	5	39,000	31,200	43
	75	7	54,600	43,680	60
Narrow-body Jet	140	1	14,560	11,648	16
	140	3	43,680	34,944	48
	140	5	72,800	58,240	80
	140	7	101,920	81,536	112
Wide-body Jet	250	1	26,000	20,800	29
	250	3	78,000	62,400	86
	250	5	130,000	104,000	143
	250	7	182,000	145,600	200

Domestic Market Sizes

Market Size - Full Catchment					Airport Share				
Rank	City	Province	Annual Market Size	Passengers per Day Each Way	YLV	YKA	YVR	YYF	Other
1	Vancouver	BC	439,806	602	62%	21%	0%	11%	6%
2	Calgary	AB	405,588	556	53%	23%	8%	9%	6%
3	Edmonton	AB	233,240	320	68%	17%	7%	1%	7%
4	Toronto	ON	183,117	251	71%	6%	14%	1%	8%
5	Victoria	BC	76,391	105	80%	7%	0%	4%	9%
6	Winnipeg	MB	60,350	83	72%	9%	8%	3%	8%
7	Saskatoon	SK	46,678	64	73%	10%	4%	5%	8%
8	Prince George	BC	41,811	57	65%	18%	5%	4%	7%
9	Fort McMurray	AB	41,733	57	73%	10%	8%	2%	8%
10	Regina	SK	32,719	45	65%	17%	4%	7%	7%
11	Montreal	QC	22,064	30	63%	10%	17%	3%	6%
12	Whitehorse	YT	21,227	29	80%	5%	5%	1%	8%
13	Ottawa	ON	20,859	29	66%	10%	12%	3%	8%
14	Fort St. John	BC	18,061	25	49%	25%	5%	14%	5%
15	Terrace	BC	16,098	22	52%	24%	10%	9%	5%
16	Grande Prairie	AB	12,343	17	65%	20%	1%	8%	7%
17	Nanaimo	BC	11,977	16	55%	22%	0%	17%	6%
18	Cranbrook	BC	9,230	13	71%	12%	0%	10%	7%
19	Halifax	NS	7,590	10	69%	11%	10%	3%	7%
20	Smithers	BC	7,166	10	41%	24%	17%	13%	4%
	Other		73,359	100	56%	16%	18%	4%	6%
	Total		1,781,408	2,440	63%	17%	6%	7%	7%

Transborder Market Sizes

Market Size - Full Catchment					Airport Share					
Rank	City	State	Annual Market Size	Passengers per Day Each Way	YLR	YKA	YVR	YYF	BLI	Other
1	Las Vegas	NV	82,791	113	75%	7%	6%	1%	3%	8%
2	Los Angeles	CA	45,016	62	65%	7%	19%	2%	1%	7%
3	Phoenix	AZ	41,047	56	78%	4%	10%	1%	0%	8%
4	Seattle	WA	21,593	30	82%	3%	4%	1%	3%	8%
5	San Francisco	CA	18,187	25	68%	6%	18%	1%	0%	7%
6	Kahului	HI	16,615	23	68%	11%	12%	1%	1%	7%
7	Honolulu	HI	11,181	15	61%	8%	20%	1%	2%	6%
8	San Diego	CA	8,630	12	65%	5%	19%	1%	2%	7%
9	Palm Springs	CA	8,325	11	64%	10%	13%	1%	5%	6%
10	Santa Ana	CA	8,199	11	82%	1%	9%	0%	0%	9%
11	Chicago	IL	6,443	9	64%	6%	20%	2%	0%	7%
12	Denver	CO	6,390	9	65%	7%	19%	1%	1%	7%
13	Dallas	TX	6,149	8	68%	10%	13%	1%	1%	7%
14	Orlando	FL	6,129	8	65%	6%	20%	2%	0%	7%
15	Portland	OR	5,663	8	68%	9%	11%	2%	4%	7%
16	Kona	HI	5,172	7	77%	4%	10%	1%	0%	8%
17	Fort Lauderdale	FL	4,496	6	70%	9%	12%	2%	0%	7%
18	Boston	MA	4,304	6	72%	6%	13%	1%	0%	7%
19	Salt Lake City	UT	4,189	6	72%	5%	13%	1%	1%	8%
20	New York	NY	4,017	6	57%	11%	23%	3%	0%	6%
	Other		76,654	105	67%	7%	15%	2%	2%	7%
Total			391,192	536	71%	7%	13%	1%	2%	7%

International Market Sizes

Market Size - Full Catchment				Airport Share				
Rank	City	Annual Market Size	Passengers per Day Each Way	YLW	YKA	YVR	YYF	Other
1	Cancun	27,804	38	76%	2%	14%	1%	7%
2	Puerto Vallarta	25,161	34	74%	3%	14%	0%	8%
3	London	16,631	23	63%	10%	17%	3%	7%
4	San Jose del Cabo	14,337	20	76%	4%	12%	0%	8%
5	Varadero	9,460	13	70%	7%	14%	1%	7%
6	Sydney	8,287	11	63%	13%	15%	2%	6%
7	Frankfurt	5,335	7	56%	14%	20%	3%	6%
8	Amsterdam	5,088	7	65%	4%	20%	4%	7%
9	Delhi	4,880	7	40%	7%	33%	17%	4%
10	Hong Kong	4,421	6	33%	5%	56%	3%	3%
11	Paris	4,254	6	56%	6%	29%	3%	6%
12	Auckland	3,899	5	53%	23%	11%	7%	6%
13	Mexico City	3,801	5	61%	5%	20%	7%	7%
14	Brisbane	3,781	5	68%	11%	13%	1%	7%
15	Tokyo	3,589	5	56%	8%	27%	2%	6%
16	Zurich	3,265	4	61%	14%	16%	2%	6%
17	Bangkok	2,893	4	65%	9%	17%	2%	7%
18	Manila	2,720	4	48%	9%	32%	6%	5%
19	Seoul	2,718	4	44%	12%	37%	3%	5%
20	Beijing	2,637	4	33%	8%	54%	2%	3%
	Other	113,729	156	56%	9%	26%	3%	6%
	Total	268,690	368	61%	8%	22%	2%	6%

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