

August 2022

Air Travel Picking Up

The number of passengers at California's major airports has increased in recent months. The gain is led by airports that mainly serve domestic travel while airports serving international travel are seeing strong recent increases in travel volumes but are farther behind 2019 passenger totals.

The 4 major Southern California airports (LAX, OC, BUR and ONT) had the largest increase over 2021 passenger levels for the first months of 2022 (77.2%) but still trailed 2019 volumes by more than 20%. The three major Bay Area airports (SFO, OAK and SJC) saw a strong increase in 2022 but trailed 2019 levels by the most of any region (27.8%).

The San Diego and Sacramento airports are the closest to matching pre-pandemic travel volumes.

All of the data comes from airport websites.

Air Passengers First Six Months of Year
(Millions)

	2019	2020	2021	2022	22 vs 19	22 vs 21
Southern California	53.7	22.5	23.3	41.3	-23.1%	77.2%
San Francisco Bay Area	33.0	16.1	13.9	23.9	-27.8%	71.8%
San Diego	12.1	5.3	5.8	10.0	-17.1%	72.8%
Sacramento Region	2.7	1.3	1.7	2.5	-8.4%	46.9%

Source: Airport websites

Air travel picked up in June and with two more summer months, air travel volumes will likely get closer to pre-pandemic levels. San Diego airport surpassed June 2019 passenger volume in June 2022 and Sacramento airport was close to 2019 volumes. For Southern California and Bay Area airports June 2022 was closer to pre-pandemic levels than the six month totals.

Air Passengers in
June
(Millions)

	June 2019	June 2020	June 2021	June 2022	22 vs 19	22 vs 21
Southern California	10.0	1.4	6.4	8.2	-17.9%	27.6%
San Francisco Bay Area	6.1	1.5	2.4	4.8	-21.5%	101.7%
San Diego	1.0	0.6	0.5	1.2	20.7%	126.8%
Sacramento Region	0.5	0.1	0.4	0.5	-3.8%	15.3%

One of the reasons that Southern California and Bay Area airports are farther behind 2019 passenger levels is that they are the main airports for international travel, which has only very recently started to recover. A comparison of June international volumes at SFO, LAX and SJC is shown below and even with the growth in June 2022, volumes are well below 2019 levels.

International Air Passengers in June
(Millions)

	June 2019	June 2020	June 2021	June 2022
SFO	1.49	0.04	0.27	1.04
LAX	2.36	0.13	0.76	1.62
SJC	0.83	0.03	0.43	0.37

Southern California Airport Trends

Compared to 2019 Orange County, Burbank and Ontario airports had similar passenger volumes in the first six months of 2022. All of the Southern California declines compared to 2019 came from LAX, in part as discussed above from declines in international travel.

Air Passengers First Six Months of Year
(Millions)

	2019	2020	2021	2022	22 vs 19	22 vs 21
Southern California Airports	43.0	17.7	18.0	30.6	-28.8%	70.5%
LAX	43.0	17.7	18.0	30.6	-28.8%	70.5%
OC	5.3	2.2	2.6	5.2	-1.2%	99.5%
BUR	2.7	1.3	1.1	2.8	0.7%	160.4%
ONT	2.6	1.4	1.7	2.7	2.7%	60.3%

All Southern California airports except Los Angeles International exceeded their 2019 passenger volumes in June 2022.

Air Passengers in
June
(Millions)

	June 2019	June 2020	June 2021	June 2022	22 vs 19	22 vs 21
LAX	8.04	1.03	4.89	6.12	-23.9%	25.2%
OC	0.92	0.18	0.73	1.00	8.8%	37.1%
BUR	0.52	0.09	0.36	0.54	4.2%	51.0%
ONT	0.48	0.14	0.43	0.51	7.1%	19.0%

Bay Area Airport Trends

All of the Bay Area airports remain well below 2019 in passenger volumes for the first six months of the year, though all show substantial gains compared to the first six months of 2021.

Air Passengers First Six Months of Year
(Millions)

	2019	2020	2021	2022	22 vs 19	22 vs 21
San Francisco Bay Area						
SJC	7.4	3.1	2.6	5.1	-31.7%	94.6%
SFO	19.1	10.4	8.1	13.8	-27.7%	71.2%
OAK	6.5	2.6	3.2	5.0	-23.5%	54.7%

On the other hand, all Bay Area airports trailed 2019 passenger levels in June 2022.

Air Passengers in
June
(Millions)

	June 2019	June 2020	June 2021	June 2022	22 vs 19	22 vs 21
SJC	1.41	0.19	0.76	1.07	-24.0%	41.9%
SFO	3.48	1.04	0.81	2.67	-23.4%	230.4%
OAK	1.22	0.26	0.82	1.06	-13.3%	29.9%

Comments

While passenger levels have been increasing throughout the state's major airports, there are headwinds causing uncertainty as to how quickly they can recover from here.

Many airlines are reducing flight schedules and COVID cases, while declining recently, are still high enough to discourage some travelers.

On the positive side, it is likely that the conditions that reduced international travel will continue to abate and those travel levels will increase.

It is too soon to know what the circumstances will be for the Thanksgiving and winter holidays.