

# Regional Airport Planning Committee Meeting Notice

## COMMITTEE MEMBERS

### Chair:

Rich Garbarino, ABAG

### Vice Chair:

Dean Chu, MTC

### Members:

David Chiu, City and Co. San Francisco

Alice Fredericks, Marin County

Alice Lai-Bitker, BCDC

Jake Mackenzie, MTC

Cary Greene, SJC

Elisha Novak, FAA

James Spering, MTC

Carol Groom, BAAQMD

John Gioia, Contra Costa County

John Martin, SFO

Kristi McKenney, OAK

Leander Hauri, General Aviation

Sam Salmon, ABAG

Sean Randolph, BCDC

Terry Barrie, Caltrans

Tom Bates, BCDC

Mark Luce, ABAG

Roger Dickinson, Sacramento County

Carl Miller, Monterey County

Leroy Ornellas, San Joaquin County

### Alternates:

G. Hardy Acree, Sacramento County

Susan Palmeri, San Joaquin County

Tom Greer, Monterey County

John Bergener, SFO

### Staff liaisons:

Lindy Lowe, BCDC

Joe LaClair, BCDC

Doug Kimsey, MTC

Danielle Hutchings, ABAG

9:30 A.M. – Noon  
Friday, February 26, 2010  
MetroCenter Auditorium  
101 8<sup>th</sup> Street  
Oakland, CA 94607

## ***Tentative Agenda***

- 1. Call to Order**
- 2. Public Comment Period (*Each speaker is limited to three minutes*)**

A maximum of 15 minutes is available for the public to address the Committee on any matter on which the Committee either has not held a public hearing or is not scheduled for a public hearing later in the meeting. Speakers will be heard in the order of sign-up, and each speaker is generally limited to a maximum of three minutes. It is strongly recommended that public comments be submitted in writing so they can be distributed to all Committee members for review. The Committee may provide more time to each speaker and can extend the public comment period beyond the normal 15-minute maximum if the Committee believes that it is necessary to allow a reasonable opportunity to hear from all members of the public who want to testify. No Committee action can be taken on any matter raised during the public comment period other than to schedule the matter for a future agenda or refer the matter to the staff for investigation unless the matter is scheduled for action by the Committee later in the meeting.

- 3. Approval of Minutes of November 20, 2009 Meeting**
- 4. Progress Report/Schedule** RAPC staff will present a report of the progress to date and an updated Phase 2 Project Schedule. (RAPC Staff)
- 5. Regional Airport System Planning Analysis**
  - a. High Speed Rail** The consulting team will present an analysis on the effects of High Speed Rail on Demand for Bay Area Air

Travel. (Geoff Gosling)

**b. Demand Management Scenario** The consulting team will present the analysis of potential effects of the demand management scenario to reduce congestion and improve efficiency of operations at the Bay Area airports based on projected runway conditions in 2035. (Geoff Gosling)

**c. Public Workshops** RAPC staff will present plans for the upcoming public workshops and discuss the desired outcomes, ways to get good public participation, and useful public input at the meetings. (Lindy Lowe)

**6. New Business and Announcements**

Next RAPC meeting will be held on March 26, 2010

**7. Old Business**

**8. Adjournment**

All items on the agenda are subject to action by the Committee. Actions suggested by staff are subject to change by the Committee.

**Speaker Sign-Up and Time Limits.** The public is encouraged to comment on agenda items at Committee meetings by completing a request-to-speak card (available from staff) and passing it to the Committee secretary or chair. Public comment may be limited by any of the procedures set forth in Section 3.09 of MTC's Procedures Manual (Resolution No. 1058, Revised) if, in the chair's judgment, it is necessary to maintain the orderly flow of business.

**Access to Meetings.** Meeting facilities are accessible to persons with disabilities. If you require special assistance, please contact any staff member prior to the meeting. An interpreter for the deaf will also be made available upon request to the staff at least five days prior to the meeting.

**Bagley-Keene Open Meeting Act.** The Committee is governed by the Bagley-Keene Open Meeting Act which requires the Committee to: (1) publish an agenda at least ten days in advance of any meeting; (2) describe specifically in that agenda the items to be transacted or discussed; and (3) refuse to add an item subsequent to the published agenda. In addition to these general requirements, the Bagley-Keene Act includes other specific provisions about how meetings are to be announced and conducted.

**Record of Meeting.** RAPC meetings are tape-recorded. Copies of recordings are available at nominal charge, or recordings may be listened to at MTC offices by appointment. Audio casts are maintained on MTC's Web site for public review for at least one month.



# Demand Management Scenario

## *RAPC Meeting*

*Prepared for:*

**Regional Airport Planning Committee**



METROPOLITAN  
TRANSPORTATION  
COMMISSION



Bay Conservation  
Development Commission

# Objective of the Demand Management Scenario

*Estimate the Potential Delay Reduction Benefits of  
a Generic Demand Management Program*

# Scope of the Demand Management Forecast Analysis

- ◆ **Assumes Demand Management is Implemented at SFO Only, Since OAK and SJC are not Forecast to Incur Serious Delays**
- ◆ **Forecast Year is 2035**
- ◆ **Focus is on Small Aircraft in the Peak Period When Poor Weather Conditions (Fog) Can Significantly Reduce SFO's Hourly Runway Capacity**
- ◆ **The Peak Period is Defined as 6 hours from 8:00AM to 2:00PM**

# Key Elements and Major Assumptions – *Passenger Airline Markets*

## ◆ **Bus Substitution in Close-in Markets**

- Flights to markets under 100 air miles (or under a 2 hour drive) are eliminated and frequent bus service is implemented

## ◆ **Demand Management Principally Affects Turboprop and RJ Flights with Fewer than 100 Seats**

- 50% of small aircraft flights during shoulder periods (8:00-8:59AM and 1:00-1:59PM) are assumed to shift to adjacent hours
- Remaining small aircraft flights during the Peak are assumed to be upgauged to 100-seat jet aircraft

## ◆ **Some Narrowbody Jet Flights May Also Respond to Demand Management Measures**

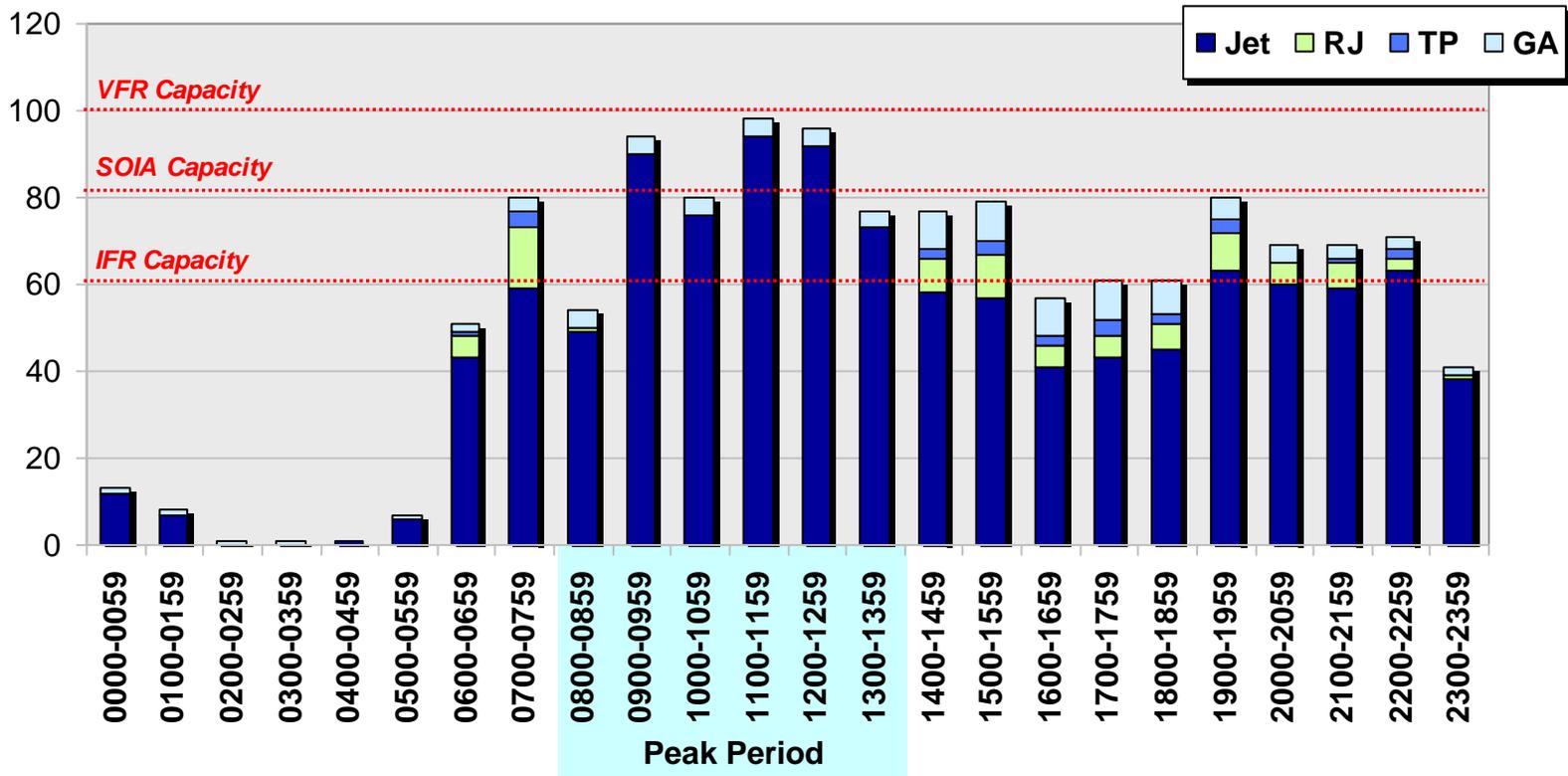
- 20% of narrowbody jets during shoulder periods (8:00-8:59AM and 1:00-1:59PM) are assumed to shift to adjacent hours

# Key Elements and Major Assumptions – *General Aviation*

- ◆ **GA Flights are Assumed to be Limited by Facility Management Policies**
  - 2035 GA activity held constant at the actual 2007 GA activity level, with forecast growth in GA demand accommodated at Bay Area GA Reliever airports
  
- ◆ **Assumed a Minimal Number of GA Operations Would Still Operate During the Peak Through a Slot Reservation System**
  - Peak period GA activity limited to 4 operations (2 arrivals and 2 departures) per hour
  - Base Case average peak demand is 6 GA operations per hour
  - GA operations not accommodated during the peak move to off-peak hours

# In the Demand Management Scenario, Passenger Airline and GA Demand Falls Below VFR Capacity During the Peak, But Remains Well Above IFR Capacity

Average Daily Passenger Airline and GA Operations by Hour  
Demand Management Scenario Forecast 2035



# Conclusions & Next Steps

## Conclusions

- ◆ **Demand Management May Not be Sufficient to Eliminate Serious Delays in Poor Weather Conditions**
- ◆ **The Effectiveness of Demand Management at SFO in 2035 is Limited by:**
  - The share of total airport operations in small aircraft (passenger and GA) declines over the forecast period from 35% in 2007 to 20% in 2035
    - *Demand Management further reduces the small aircraft share to 14%*
  - The baseline forecast already accounts for upgauging from 30 and 50-seat aircraft to 70-seat aircraft
  - Large jet aircraft operations, which exceed IFR capacity for most of the peak period in the Base Case, are not affected by demand management

## Next Steps

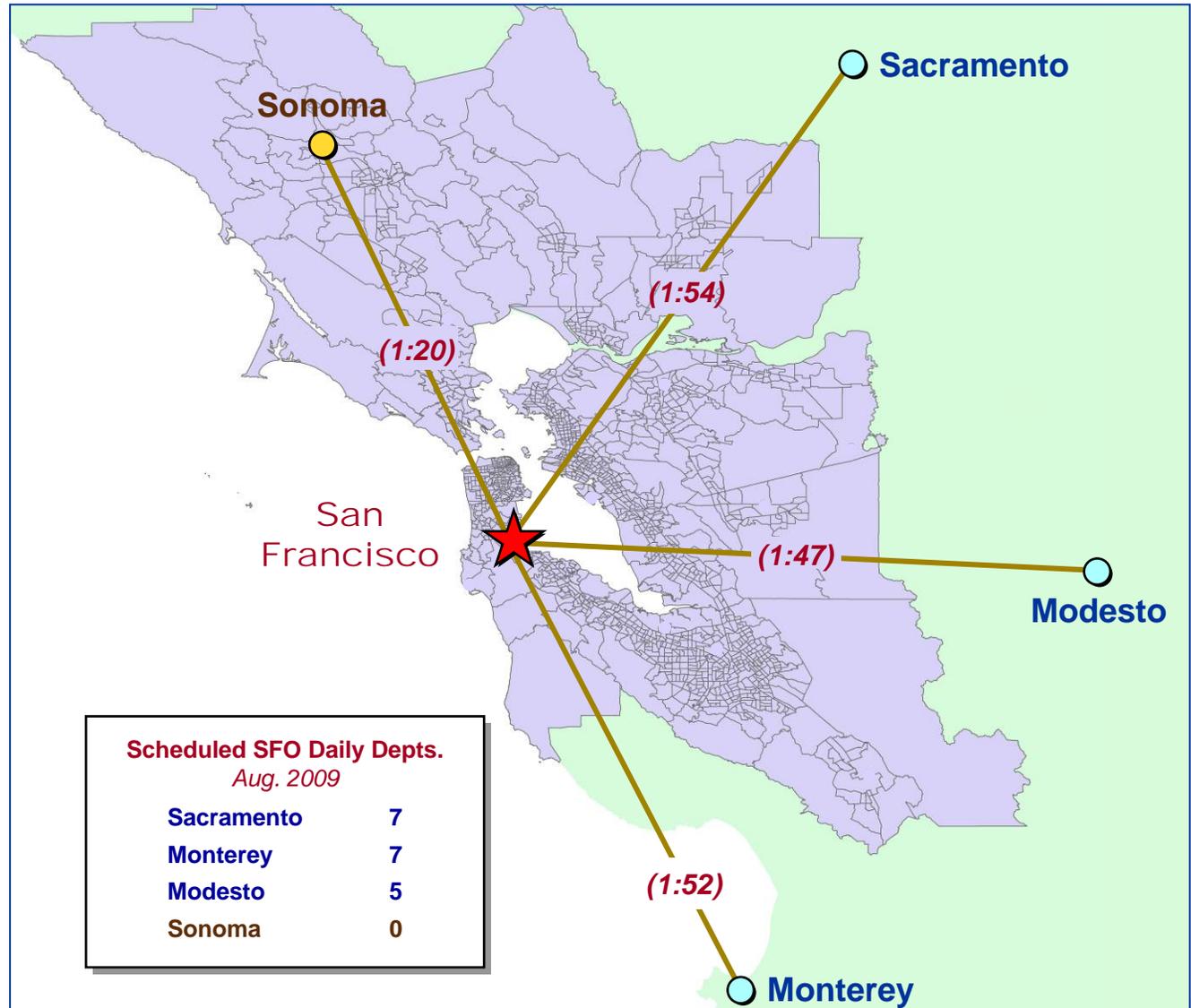
- ◆ **Assess Potential Impacts on SFO Delays, Noise and Air Quality**



## Appendix

# Bus Substitution in the Monterey, Modesto and Sacramento Markets Would be Similar to How the Sonoma County-SFO Market is Served Today

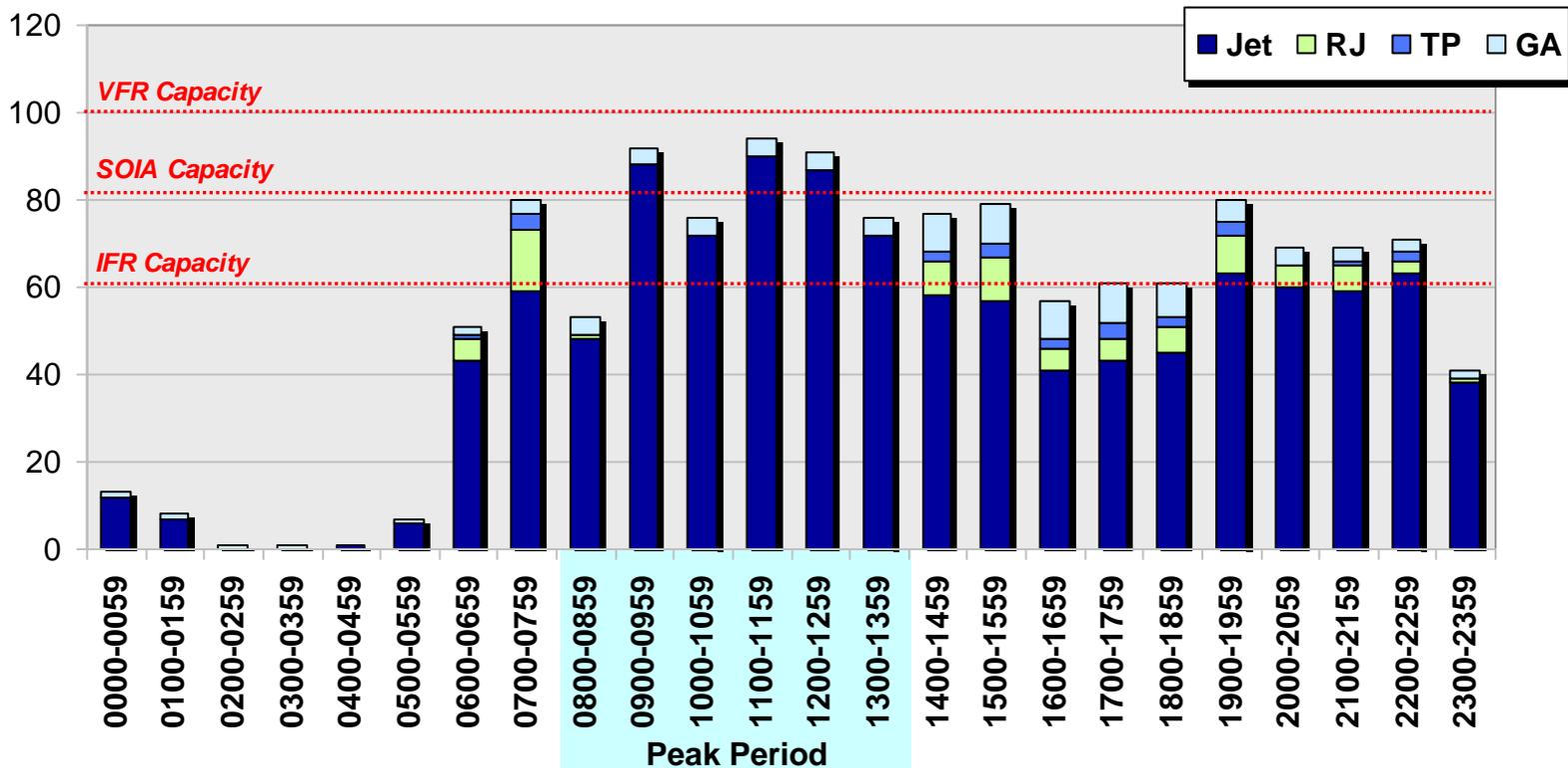
*Monterey, Modesto and Sacramento account for 10% of small aircraft operations during the peak period in the 2035 Base Case*



# If Some Small Aircraft Flights are Eliminated and Not Upgauged SFO Demand Would Still Significantly Exceed IFR Capacity During the Peak Period

## Sensitivity Analysis

Average Daily Passenger Airline and GA Operations by Hour  
Demand Management Scenario Forecast 2035

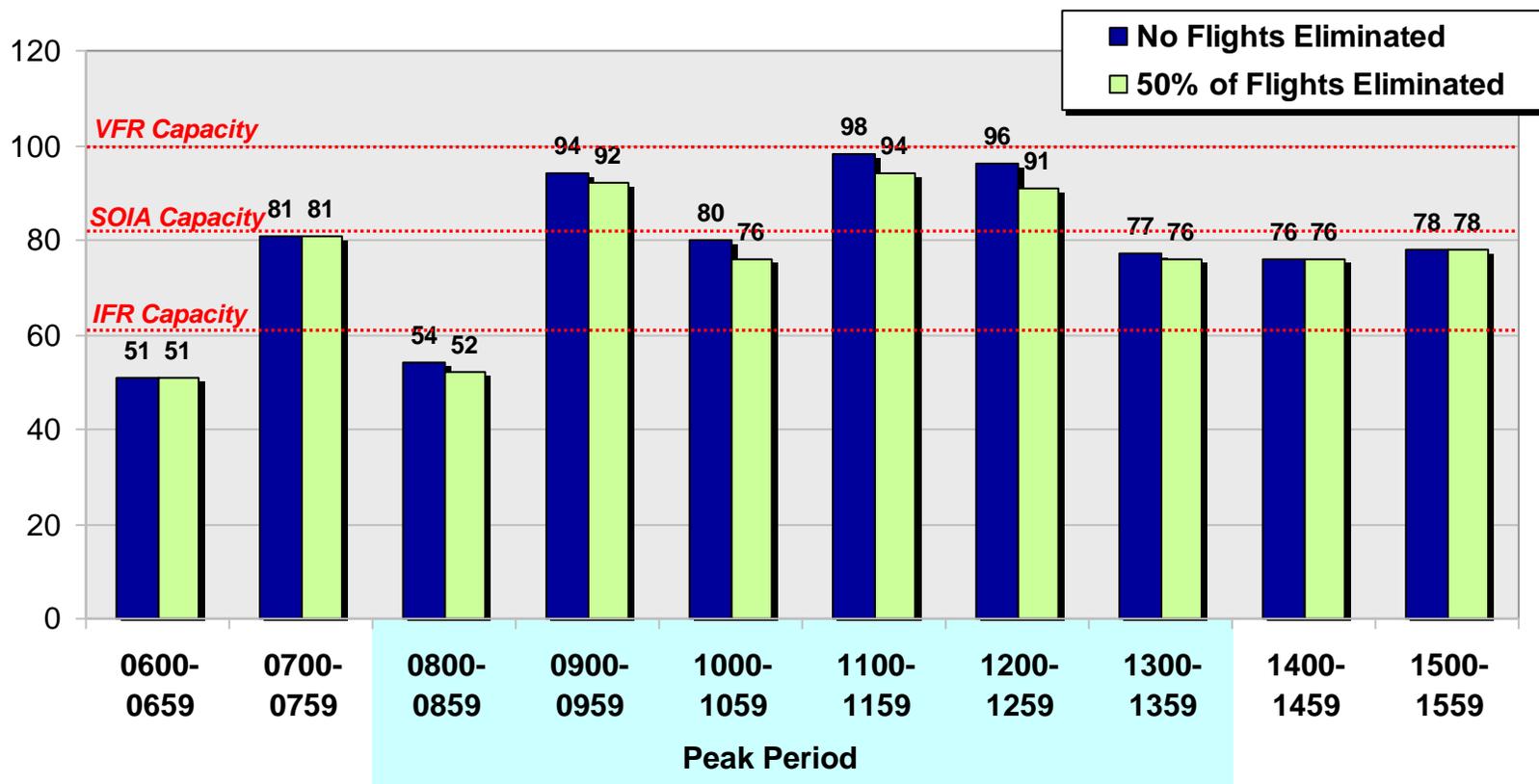


**Assumes that 50% of Peak Period Small Aircraft Flights (after schedule shifts) are Eliminated and Only 50% are Upgauged**

# If Half of the Small Aircraft Flights in the Peak Were Eliminated, Total Peak Period Activity Would be Reduced by an Average of 3 Flights per Hour

## Comparison of DM Scenario and DM Sensitivity Case

Average Daily Passenger Airline and GA Operations by Hour  
Demand Management Scenario Forecast 2035





# High-Speed Rail Scenario

## *RAPC Meeting*

*Prepared for:*

## Regional Airport Planning Committee



METROPOLITAN  
TRANSPORTATION  
COMMISSION



Bay Conservation  
Development Commission

# Presentation Topics

- 1. Planned California High-Speed Rail System**
- 2. European Experience with High-Speed Rail Market Share**
- 3. Forecast High-Speed Rail Ridership**
- 4. Forecast Diversion of Air Trips to High-Speed Rail**
- 5. Revised Base Case Airport Forecasts with Diversion of Demand to High-Speed Rail**
- 6. Sensitivity Analysis**
- 7. Next Steps**

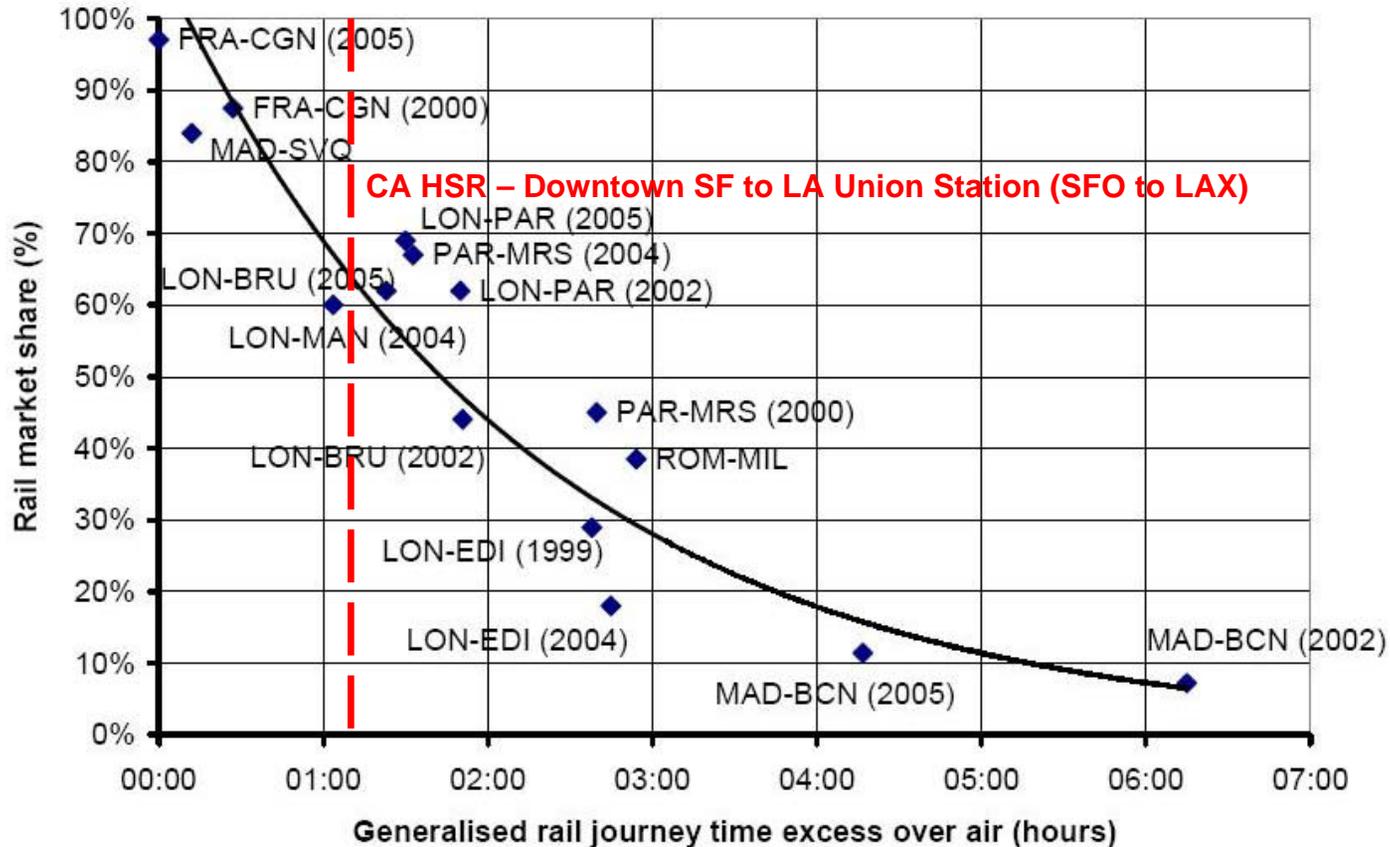
# Planned California High-Speed Rail System

- ◆ **Ultimate Network (Full System) Includes Lines to Sacramento and San Diego**
- ◆ **Initial Phase Provides Service Between the Bay Area and Anaheim via the Central Valley**
  - The California High Speed Rail Authority Currently Envisages the Initial Phase to be Operational by 2020
  - No Dates Have Been Established for Service Expansion Beyond the Initial Phase



# European Experience with High-Speed Rail Market Share

**Difference Between Rail and Air Generalized Journey Time and Relationship with Market Share**

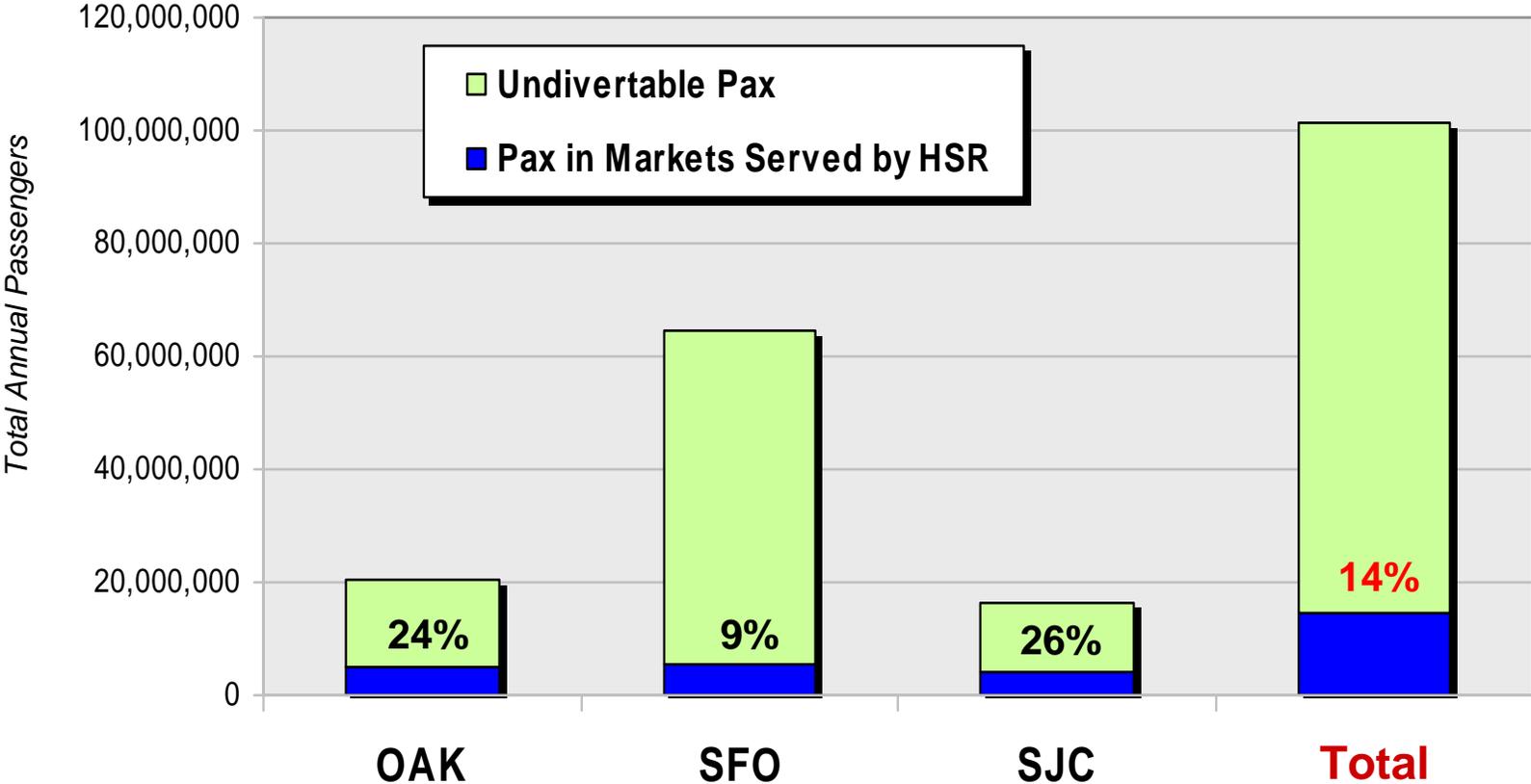


Source: Steer Davies Gleeve, *Air and Rail Competition and Complementarity*, Report Prepared for the European Commission DG TREN, London, August 2006, Figure 2.7.

Note: CA HSR times assume 60 minute airport terminal time, 20 minute HSR station terminal time. Other times from California HSR ridership forecasts.

# Proportion of Bay Area Air Trips in California Corridor Markets

Maximum Potential Passenger Diversion to HSR  
2035



# Forecast High-Speed Rail Ridership

- ◆ **Detailed Ridership Forecasts Prepared for MTC and California High Speed Rail Authority in 2007**
  - Assumed Full System in Operation
  - Assumed High-Speed Rail Fares Set to 50% of Comparable Air Fares
  - Ridership Forecasts Generated Using Statewide Interregional Travel Model
- ◆ **Updated Ridership Forecasts Released by California High Speed Rail Authority in December 2009**
  - Ridership Forecasts Prepared for Initial Phase Only
  - Assumed High-Speed Rail Fares Set to 83% of Comparable Air Fares
    - *Based on Analysis Suggesting this Fare Level Will Maximize Ratio of Revenue to Operating Costs*
  - Total High-Speed Rail Ridership in 2035 of 41 million Annual Trips
    - *29 million Inter-regional Trips, 12 million Intra-regional Trips*

# Forecast Diversion of Air Trips to High-Speed Rail

- ◆ **High-Speed Rail Scenario Based on Initial High-Speed Rail System in 2035**
- ◆ **High-Speed Rail Market Share in California Corridor Markets Derived from CHSRA December 2009 Ridership Forecasts**
  - HSR Fares at 83% of Corresponding Airfares
  - Ridership Projections on Region to Region Basis
    - *Inter-regional Trips Allocated to Airports in Multi-Airport Regions*
- ◆ **Diversion from Air to High-Speed Rail Derived from Change in Air Market Share Between No-Build and High-Speed Rail Scenarios**
- ◆ **Diversion Percentages from Air to High-Speed Rail by Market at OAK Assumed to be 75% of Diversion Percentages at SFO and SJC Due to Greater Distance of Primary OAK Market Area from Planned Stations**
  - Diversion Percentages by Airport Adjusted to Give Forecast Regional Diversion

# Revised Base Case Airport Forecasts with Diversion of Demand to High-Speed Rail

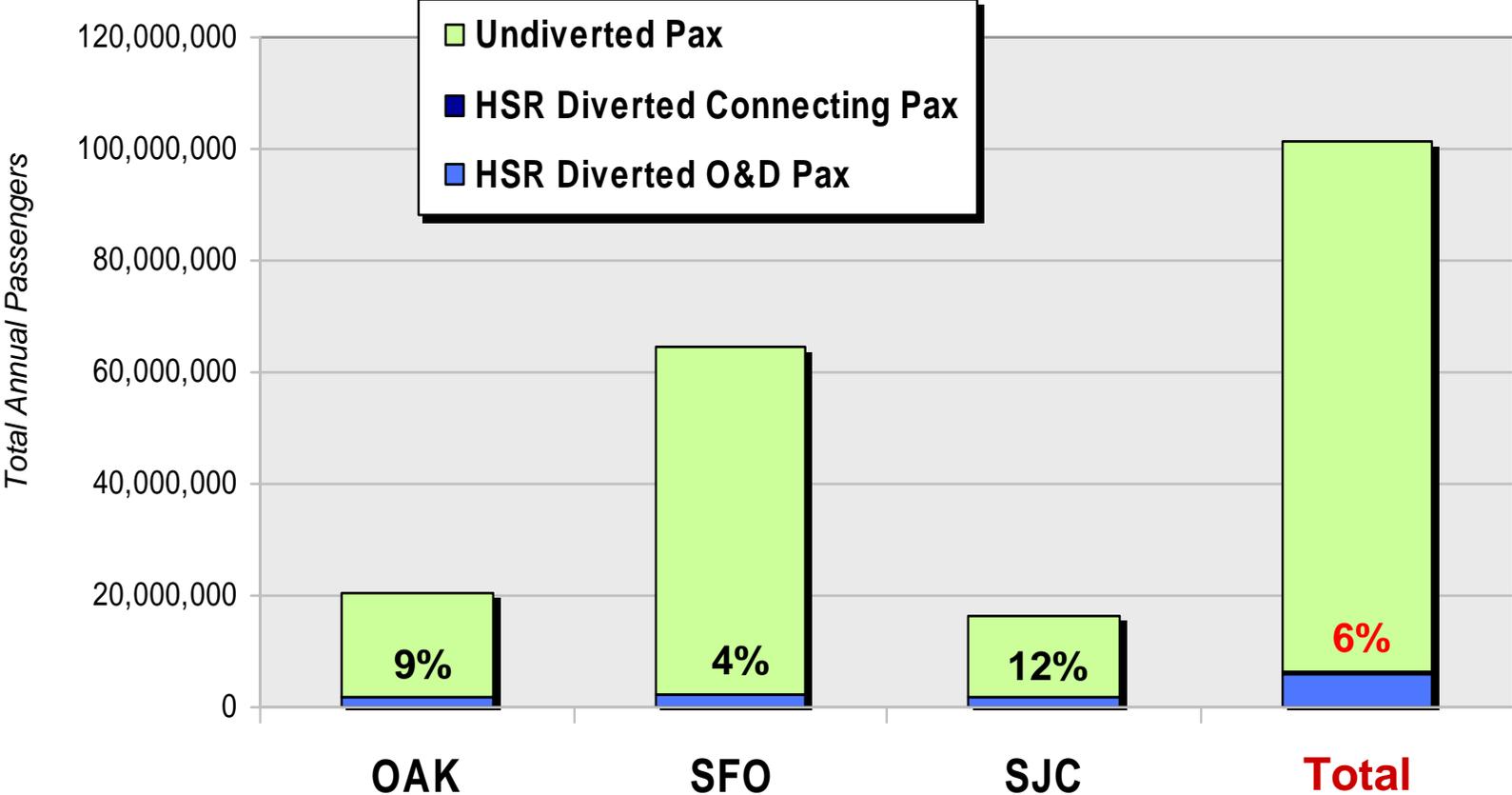
- ◆ **Resulting Assumed 2035 Diversion to High-Speed Rail by Market**
  - Accounting for Different Airport Market Shares

		OAK	SFO	SJC
LAX	Los Angeles Int'l	49%	66%	66%
SNA	Orange County	38%	51%	51%
BUR	Burbank	51%	68%	68%
ONT	Ontario Int'l	16%	21%	21%
LGB	Long Beach	38%	51%	51%
PSP	Palm Springs	15%	19%	19%
SAN	San Diego	15%	20%	20%
<b>TOTAL CORRIDOR</b>		<b>36%</b>	<b>46%</b>	<b>46%</b>

- Additionally Some Connecting Passengers at SFO Traveling to/from Central Valley Airports May be Diverted to High-Speed Rail
  - *Will Depend on Airline Fare Policies and Coordination with HSR Service*

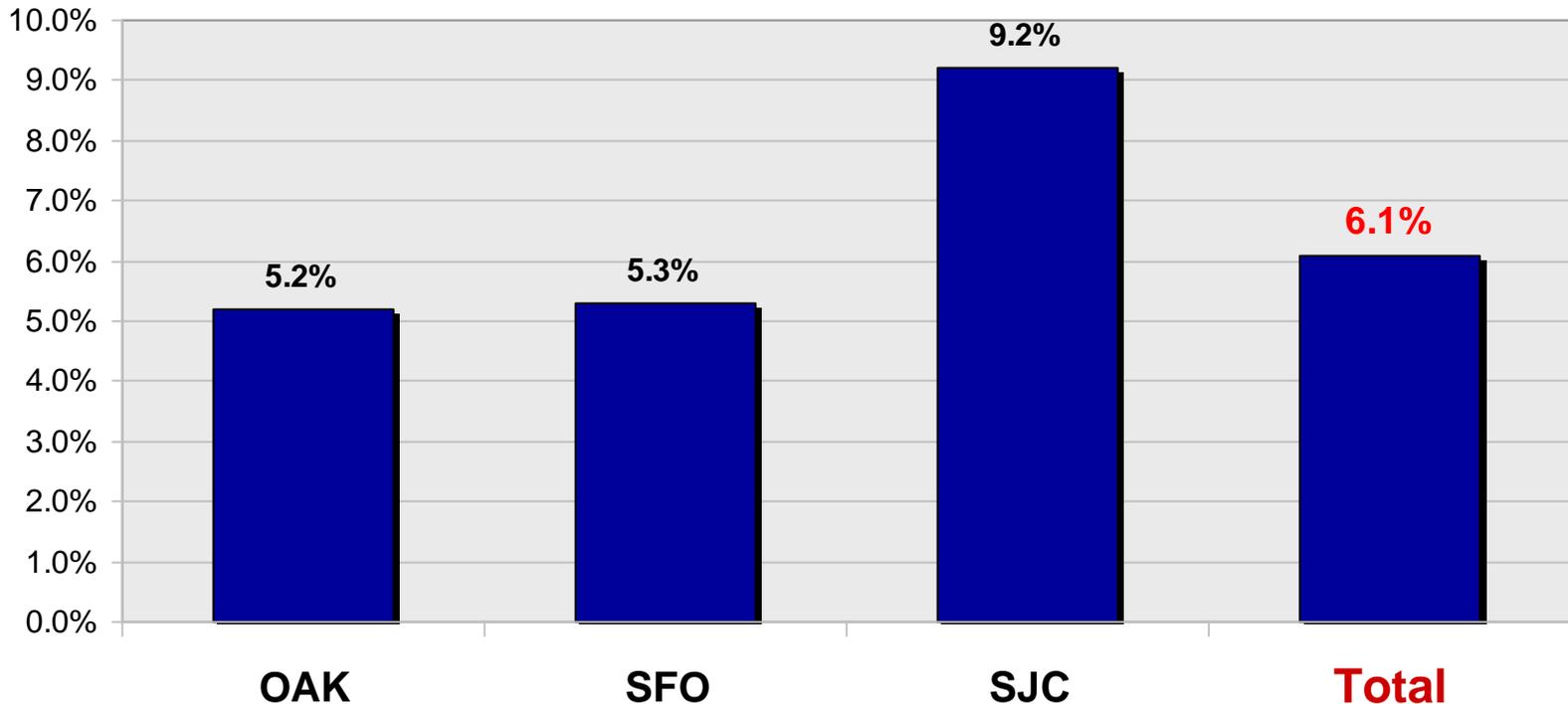
# Revised Base Case Airport Forecasts with Diversion of Demand to High-Speed Rail - 2035

HSR Passenger Diversion  
2035



# Based on the High-Speed Rail Diversion Estimates, Total Aircraft Activity at the Primary Airports Could be Reduced by 6.1% in 2035

High-Speed Rail Scenario  
Percent Reduction in Annual Operations at the Primary Airports  
2035



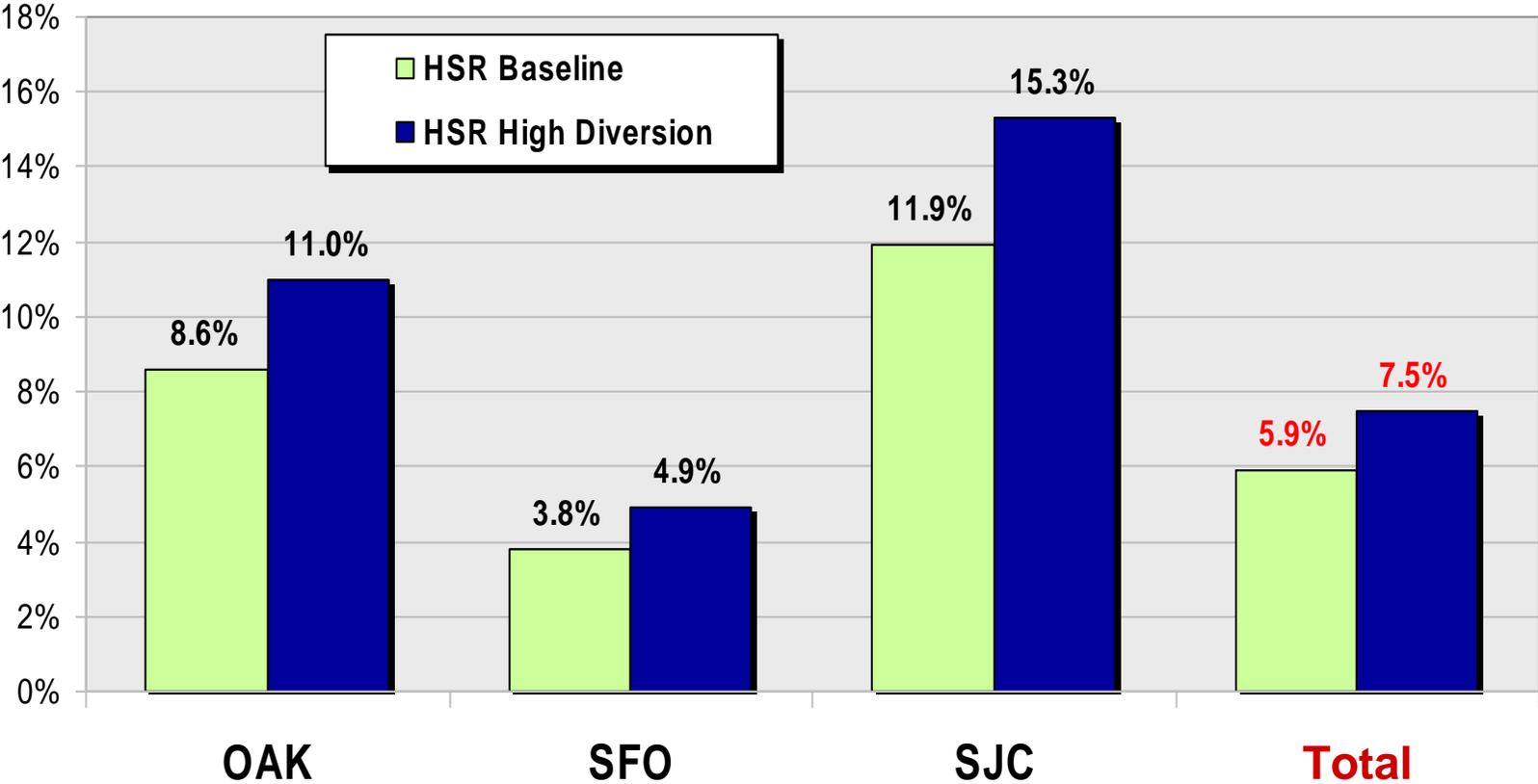
*Assumes Airlines Continue to Serve the Southern CA Markets with Small Narrow Body Aircraft Similar to Base Year (2007) Service Patterns*

# Sensitivity Analysis

- ◆ **Assumptions Giving a Higher Diversion Percentage from Air to Rail**
  - High-Speed Rail Fares Set to 50% of Corresponding Air Fares
    - *Fare Assumption Used for the Earlier (2007) Ridership Forecasts*
  - Full System in Operation by 2035
    - *Change from the Initial System Primarily Affects Travel Between the Bay Area and the San Diego Region*
- ◆ **Airlines May Reduce Average Aircraft Size to Maintain Service Frequency**
  - Will Offset the Reduction in Aircraft Operations from Diversion of Air Trips to Rail

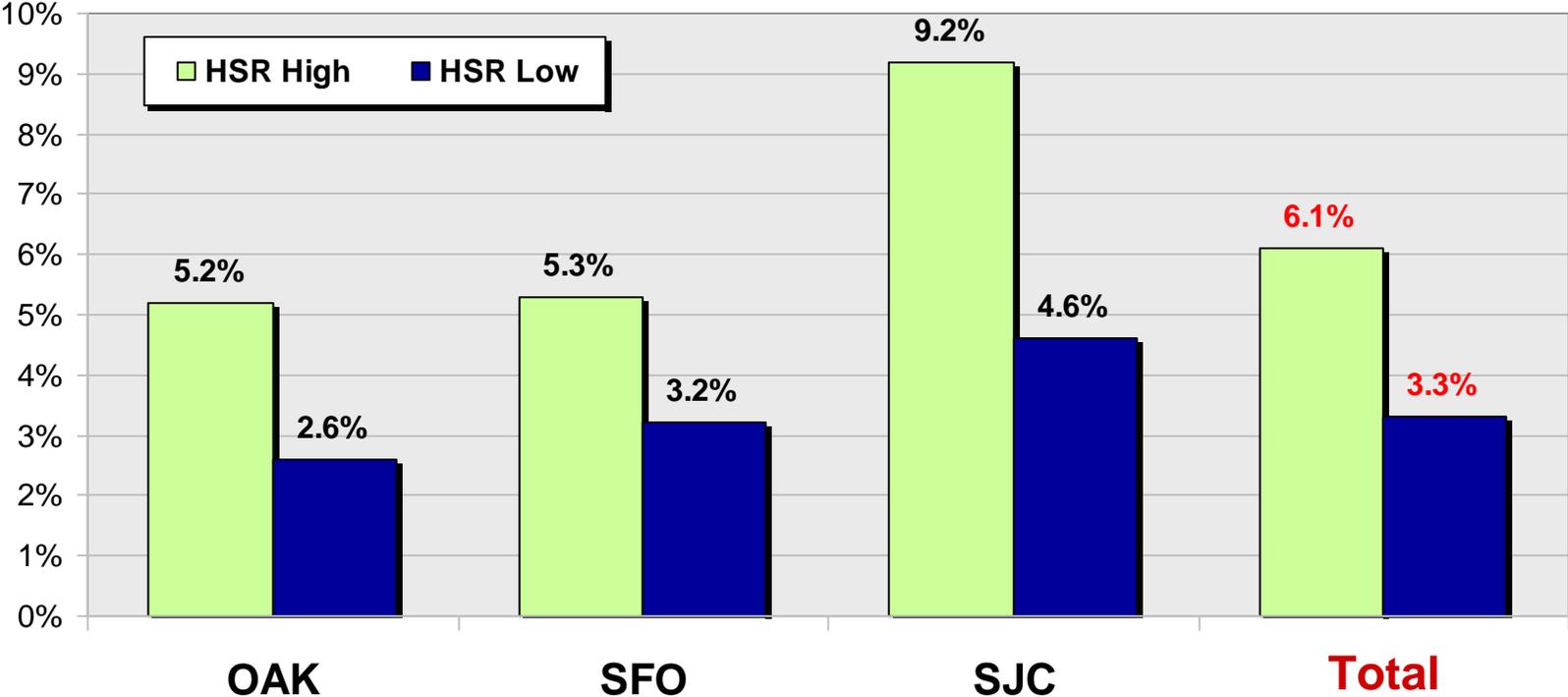
# If HSR Fares Were 50% of Air Fares and the Full HSR System was Built, Air Travel Diversion to HSR Would Increase

High-Speed Rail Scenario  
Percent Diversion of Annual Passengers to HSR at the Primary Airports  
2035



# If Airlines Were to Substitute Smaller Aircraft in Some Southern CA Markets, the Reduction in Aircraft Activity Would be Less

High-Speed Rail Scenario  
Percent Reduction in Annual Operations at the Primary Airports  
2035



Note: Assumes average aircraft seats per operation in the Bay Area-Southern CA markets falls from 128 to 92.

# Other Factors That Could Change Diversion from Air to High-Speed Rail

- ◆ **Need for Security Screening of High-Speed Rail Passengers**
  - Current High-Speed Rail Ridership Forecasts Assume that High-Speed Rail Passengers Will Not Need to be Screened
    - *Reduces the Rail Terminal Time Compared to Air*
  - Introduction of Screening Would Increase Overall Travel Time by High-Speed Rail
    - *Will Reduce the Diversion of Air Trips to Rail*
- ◆ **Airline Competitive Response to Loss of Market Share**
  - May Reduce or Eliminate Any Fare Differential Between Air and High-Speed Rail
    - *Reduction in the Fare Differential Will Reduce the Diversion of Air Trips to Rail*
- ◆ **No Quantitative Assessment Made of the Potential Effect of These Factors**

# Next Steps

- ◆ **Calculate Impacts of Diversion of Air Trips to High-Speed Rail for Use in Target Analysis**
  - Change in Aircraft Operations
  - Change in Ground Access Travel
  
- ◆ **Impacts to be Considered**
  - Aircraft Delay
  - Service Frequency
  - Air Quality Emissions
  - Greenhouse Gas Emissions
  - Population Exposed to 65 CNEL and 55 CNEL Aircraft Noise

# SH&E

an ICF International Company



## Appendix

# CHSRA Forecast High-Speed Rail Ridership

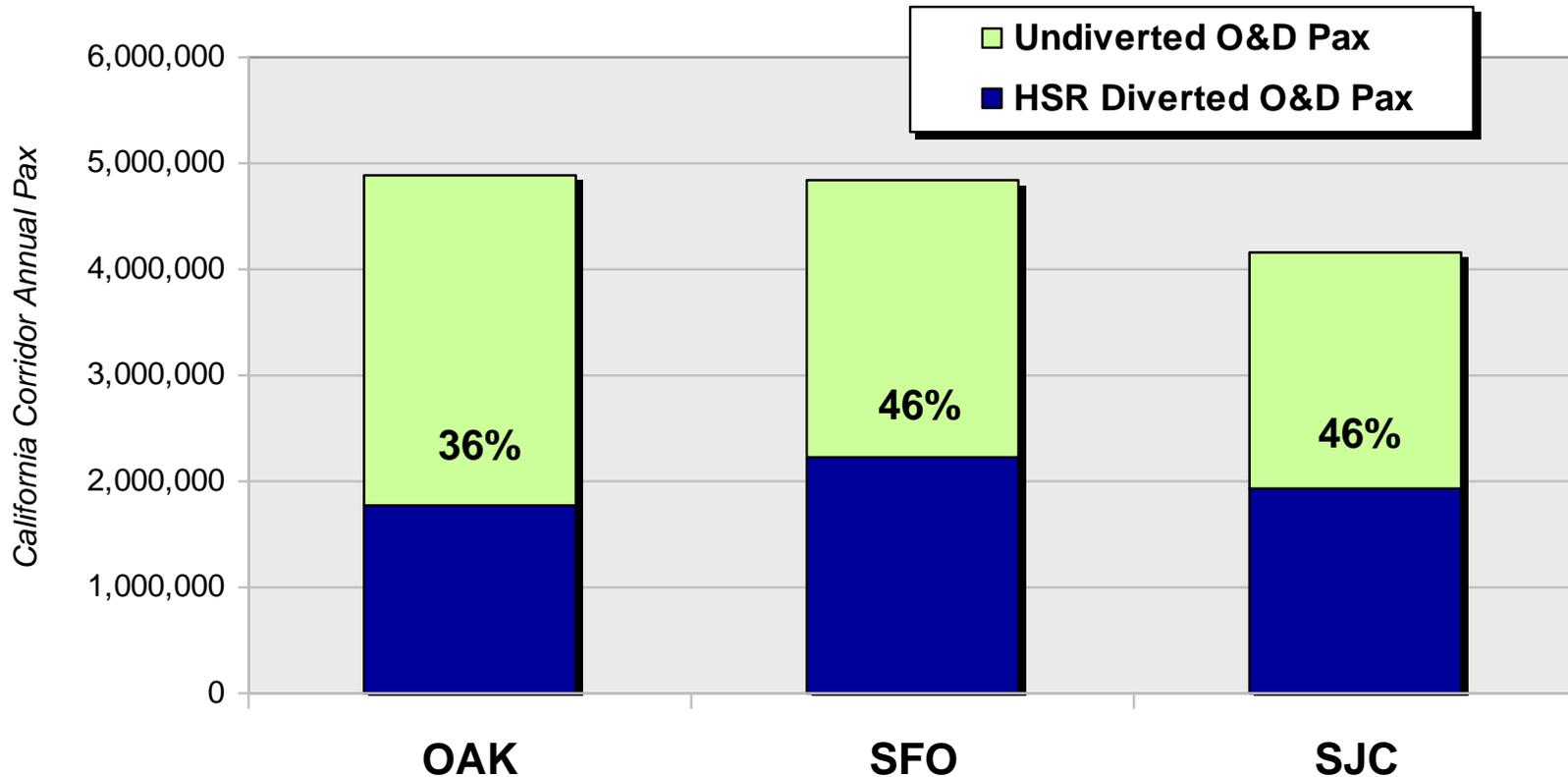
- ◆ **December 2009 Forecast Ridership by Segment**
  - Initial Phase, 2035, High-Speed Rail Fares 83% of Air Fares

Market Pairs (Ultimate trip ends)	Riders (millions)	Revenues (millions, 2009\$)
<b>LA Basin – Bay Area, with intermediate markets</b>	<b>23.4</b>	<b>\$2,095</b>
<i>LA Basin- Bay Area</i>	7.9	\$900
<i>San Joaquin Valley - LA Basin</i>	6.3	\$467
<i>Bay Area - San Joaquin Valley</i>	5.8	\$458
<i>Monterey Bay /Central Coast - LA Basin &amp; Bay Area</i>	2.9	\$238
<i>Within San Joaquin Valley</i>	0.5	\$32
San Diego region - Bay Area	2.0	\$234
LA basin – Sacramento region	1.2	\$143
Other Inter-regional	1.5	\$86
North & Sierra regions - LA Basin	0.5	\$43
Sacramento region - San Joaquin Valley	0.5	\$42
<b>Inter-regional subtotal</b>	<b>29.1</b>	<b>\$2,643</b>
within LA basin	7.9	\$152
within Bay Area Peninsula	4.0	\$76
<b>Local within-region subtotal</b>	<b>11.9</b>	<b>\$228</b>
<b>Total Initial Phase</b>	<b>41.0</b>	<b>\$2,871</b>
Source: High-Speed Rail Authority Program Management Team, 2009		

Source: California High-Speed Rail Authority, *Report to the Legislature*, December 2009, Table C.

# Diversion of Demand to High-Speed Rail in California Corridor Markets (Bay Area to Southern California/San Diego)

HSR Passenger Diversion  
2035





## Regional Airport Planning Committee

January 8, 2009

**TO:** Regional Airport Planning Committee  
**FROM:** Staff of the Regional Airport Planning Committee

**SUBJECT:** Regional Airport Systems Planning Analysis Schedule

**Background.** Phase 2 of the update to the Regional Airport Systems Planning Analysis (RASPA) is entering its second year. During the first six months of Phase 2, the focus was on developing a range of demand forecasts (High, Baseline and Low) and baseline runway capacity for SFO, OAK and SJC. Additionally, staff worked with the RAPC Task Force to identify policy and community concerns and the three working groups created to assist RAPC with its analysis of demand management, air traffic control technology and demand forecasting.

At today's RAPC meeting, the Committee will hear the last two presentations on the six scenarios that are being analyzed in Phase 2 of the update to the RASPA. These presentations will inform the Committee of the findings regarding the potential of High Speed Rail to divert air passengers in the California travel corridor and the opportunities to reduce projected delay at SFO through demand management strategies. These presentations will complete the analysis on the six scenarios, which include:

- Increased Service at Internal Secondary Airports,  
Presented to RAPC in October 2009
- Air Traffic Redistribution among SFO, OAK and SJC,  
Presented to RAPC in November 2009.
- Increased Service External Airports,  
Presented to RAPC in November 2009
- Opportunities for Air Traffic Control Technology to increase Capacity,  
Presented to RAPC in November 2009.
- Demand Management Potential,  
Presented to RAPC in November 2009 and February 2010.
- Potential Diversion to High Speed Rail,  
Presented to RAPC in February 2010.

During this first year of Phase 2, RAPC staff, working with RAPC's consultant team, the three working groups and the task force, have completed and presented the following:

- Regional Aviation Survey presented to RAPC in March 2009.
- Baseline Demand Forecasts presented to RAPC in March and June 2009.
- Baseline Runway Capacity for SFO, OAK and SJC presented to RAPC in September 2009.
- Development of Targets for the RASPA presented to RAPC in September and October 2009.
- Analysis of Scenarios (described above) presented to RAPC in October and November 2009 and February 2010.

**Next Steps.** With the completion of the preliminary analysis demand forecasts, baseline capacity and six scenarios, the Phase 2 work is now moving toward the selection of two or three scenarios to continue to study. In order to identify the scenarios that will receive further study, RAPC staff developed a set of targets which were presented to RAPC and the RAPC Task Force in the Fall. The six scenarios will be analyzed against these targets and presented to RAPC at the Committee's next meeting in March. In addition to the target analysis, the first round of public workshops will be held in the Spring. RAPC staff will augment these workshops with meetings to brief local elected officials regarding aspects of the scenarios that may impact their communities. The two or three scenarios will be chosen based on the results of the target analysis, the public workshops, the meetings with local elected officials and feedback from RAPC and the RAPC Task Force. The proposed schedule for this work is as follows:

- Target analysis of six scenarios to be presented to RAPC in March 2010.
- Briefings with locally elected officials regarding scenarios in March and April 2010.
- First round of public workshops to be held in late April 2010. Proposed locations are San Francisco, Fairfield and San Jose.
- Selection of two or three scenarios for further analysis presented to RAPC in May 2010.

Completion of this phase of the work will allow RAPC to focus on two or three alternatives to include in the update to the RASPA.

### **Meeting Topics**

- Airport Passenger Forecasts
- Potential for Increased utilization of Alternative Regional Airports
- Passenger Airline Operations
- Air Cargo Volumes and Operations
- General Aviation Operations

The next Forecast Working Group is scheduled to meet on January 9<sup>th</sup> for its second, and final, meeting regarding the assumptions and methodologies that the consultant is using for the forecasts and to provide feedback on the consultant's preliminary results and conclusions. Staff will prepare a summary of the meeting that will be distributed to the Committee at its January 23<sup>rd</sup> meeting and made available to the public at that meeting.

**October Meeting Summary.** The following is a summary of some of the main discussion points from the meeting and does not necessarily represent the conclusions or final approach that will be used by the consultant in developing the new forecasts.

#### Air Passenger Forecasts.

The greatest part of the meeting was devoted to discussing the air passenger forecasts. A long-term, 20- 25 year forecast is necessary for the regional planning process because of the length of time that is needed for coordinated planning and airport administrative or development projects. Three forecast scenarios (High, Medium, and Low) will be developed to deal with the uncertainty inherent in long range forecasting. In addition, a forecast tracking system will be developed so that there will be a mechanism for identifying the need for and timing of forecast adjustments over time. Dates and assumptions will need to be attached to the forecast demand levels in order to have a meaningful discussion of regional options for accommodating future aviation demand.

Existing airport forecasts prepared by the FAA and the airports will be reviewed when preparing the forecasts. The SFO forecasts that were recently prepared by Jacobs are unconstrained forecasts.

The consultant team will try to capture the effect of the new airline fees on the price of air travel. Since these fees are not being captured in airline ticket prices, the consultant will have to identify other sources such as US DOT Form 41 data or airline revenue reports and account for these fees in the future price of airline travel.

Fuel price assumptions have not been decided at this time. The Moderate forecast may assume oil prices stabilize at \$100 per barrel instead of the \$120 presented in the presentation. While the driving factors of future demand are the cost of airline travel and economic growth, other factors can be built into the forecasts. For example, rising fuel prices and carbon emissions fees can be built into the price of air travel. Air travel substitutes such as high speed rail or video-conferencing can be factored into the analysis outside the model framework. Potential one-time external factors, such as a major earthquake or terrorist attack, can not be predicted or explicitly

modeled. However, these events would have a temporary impact on demand and not a long-term sustained impact.

The forecast approach is to first project regional demand and then to distribute it to the individual airports (SFO, OAK and SJC) instead of developing individual forecasts by airport. First the consultant team will segment demand by domestic and world region for international. The difficulty in predicting future airport splits is that we are currently in a period of major change and Bay Area traffic is shifting from OAK to SFO as carriers reduce capacity, particularly at OAK, and Low Cost Carriers (LCCs ) are expanding at SFO.

The forecast scenarios (High, Medium, Low) can be used as a way to introduce different assumptions about carrier decisions and the future airport distribution. For example, under a high growth scenario, when pressure on capacity is greatest, we may assume a more even long-term distribution or one that is different from the moderate or low growth scenarios

#### Alternative Airports Forecast

The approach will be to evaluate air passenger demand in the catchment areas for other Bay Area airports that might potentially be used for future airline service. There would need to be a large enough market for service to be economically viable. The conclusions reached will be reviewed with 2-3 airlines that might serve these markets to seek their opinions about the potential viability of new non stop service.

#### Passenger Airline Operations

Forecasts of future airline fleet mix will be largely based on known airline plans for retirement/acquisition of new aircraft. Load factors are already quite high, so the potential for even higher load factors will need careful review.

#### Air Cargo Forecasts

Due to the limited numbers and timing, air cargo operations are not likely to have a significant impact on future airport capacity issues. The approach to these forecasts will be to review existing forecasts for the individual airports, and adjust as necessary. The potential for redistribution of current air cargo operations to alternative airports is not considered to be very probable given the economics of air cargo airlines and the need for proximity to their major markets which are in the urban core.

#### General Aviation Operations

The main focus of these forecasts will be the number of general aviation operations projected to use the air carrier runways, since this will affect the future capacity of the air carrier runways. It is not expected that the introduction of a new fleet of Very Light Jets, will have a major impact on operations at the main commercial airports, as these types of operations are more likely to use the region's reliever general aviation airports for air taxi and other types of operations.



## **Regional Airport Planning Committee**

January 8, 2009

**TO:** Regional Airport Planning Committee  
**FROM:** Staff of the Regional Airport Planning Committee  
**SUBJECT:** Public Workshops

**Background.** Phase 2 of the Regional Airport Planning Systems Analysis (RASPA) update was designed to inform and include the public at various key times during the process. The first component of the public process was the Regional Airport Survey, conducted last February. An on-going component of the public process is the RAPC Task Force that has been meeting regularly throughout the last year to provide RAPC staff and consultants with feedback on the Phase 2 process and work products. The next major component of the public process is the first series of public workshops to present the work that has been completed, including the demand forecast, the capacity analysis, preliminary analysis on the six scenarios and the results of the target analysis. There will be three workshops, each held in a different part of the region. The locations have been tentatively set for San Francisco, Fairfield and San Jose. These locations have been identified based on an interest that the workshops be spread evenly around the region and to locate them in areas where the RASPA update may be proposing a new or expanded use for that community's airfield. This first series of workshops will be held in late April or early May and RAPC staff is currently working with the RAPC Task Force members and consultant team to develop materials and public outreach, identify meeting locations and set the dates for the workshops. RAPC staff is also planning to augment these workshops with meetings in several communities to inform them of the RAPC work to date. RAPC staff has identified Contra Costa County and Sonoma County as two areas to hold informational meetings with public officials regarding RAPC's current work.

**Next Steps.** RAPC staff would like to hear feedback from the Committee on the public workshops, including content, location and outreach. The input received at these workshops will assist RAPC staff in making recommendations regarding the two or three scenarios to pursue for the rest of the RASPA update. Once the analysis on these two or three scenarios is complete, a second series of public workshops will be held to allow the public to provide input on the draft update.

**Meeting Topics**

- Airport Passenger Forecasts
- Potential for Increased utilization of Alternative Regional Airports
- Passenger Airline Operations
- Air Cargo Volumes and Operations
- General Aviation Operations

The next Forecast Working Group is scheduled to meet on January 9<sup>th</sup> for its second, and final, meeting regarding the assumptions and methodologies that the consultant is using for the forecasts and to provide feedback on the consultant's preliminary results and conclusions. Staff will prepare a summary of the meeting that will be distributed to the Committee at its January 23<sup>rd</sup> meeting and made available to the public at that meeting.

**October Meeting Summary.** The following is a summary of some of the main discussion points from the meeting and does not necessarily represent the conclusions or final approach that will be used by the consultant in developing the new forecasts.

Air Passenger Forecasts.

The greatest part of the meeting was devoted to discussing the air passenger forecasts. A long-term, 20- 25 year forecast is necessary for the regional planning process because of the length of time that is needed for coordinated planning and airport administrative or development projects. Three forecast scenarios (High, Medium, and Low) will be developed to deal with the uncertainty inherent in long range forecasting. In addition, a forecast tracking system will be developed so that there will be a mechanism for identifying the need for and timing of forecast adjustments over time. Dates and assumptions will need to be attached to the forecast demand levels in order to have a meaningful discussion of regional options for accommodating future aviation demand.

Existing airport forecasts prepared by the FAA and the airports will be reviewed when preparing the forecasts. The SFO forecasts that were recently prepared by Jacobs are unconstrained forecasts.

The consultant team will try to capture the effect of the new airline fees on the price of air travel. Since these fees are not being captured in airline ticket prices, the consultant will have to identify other sources such as US DOT Form 41 data or airline revenue reports and account for these fees in the future price of airline travel.

Fuel price assumptions have not been decided at this time. The Moderate forecast may assume oil prices stabilize at \$100 per barrel instead of the \$120 presented in the presentation. While the driving factors of future demand are the cost of airline travel and economic growth, other factors can be built into the forecasts. For example, rising fuel prices and carbon emissions fees can be built into the price of air travel. Air travel substitutes such as high speed rail or video-conferencing can be factored into the analysis outside the model framework. Potential one-time external factors, such as a major earthquake or terrorist attack, can not be predicted or explicitly

modeled. However, these events would have a temporary impact on demand and not a long-term sustained impact.

The forecast approach is to first project regional demand and then to distribute it to the individual airports (SFO, OAK and SJC) instead of developing individual forecasts by airport. First the consultant team will segment demand by domestic and world region for international. The difficulty in predicting future airport splits is that we are currently in a period of major change and Bay Area traffic is shifting from OAK to SFO as carriers reduce capacity, particularly at OAK, and Low Cost Carriers (LCCs ) are expanding at SFO.

The forecast scenarios (High, Medium, Low) can be used as a way to introduce different assumptions about carrier decisions and the future airport distribution. For example, under a high growth scenario, when pressure on capacity is greatest, we may assume a more even long-term distribution or one that is different from the moderate or low growth scenarios

#### Alternative Airports Forecast

The approach will be to evaluate air passenger demand in the catchment areas for other Bay Area airports that might potentially be used for future airline service. There would need to be a large enough market for service to be economically viable. The conclusions reached will be reviewed with 2-3 airlines that might serve these markets to seek their opinions about the potential viability of new non stop service.

#### Passenger Airline Operations

Forecasts of future airline fleet mix will be largely based on known airline plans for retirement/acquisition of new aircraft. Load factors are already quite high, so the potential for even higher load factors will need careful review.

#### Air Cargo Forecasts

Due to the limited numbers and timing, air cargo operations are not likely to have a significant impact on future airport capacity issues. The approach to these forecasts will be to review existing forecasts for the individual airports, and adjust as necessary. The potential for redistribution of current air cargo operations to alternative airports is not considered to be very probable given the economics of air cargo airlines and the need for proximity to their major markets which are in the urban core.

#### General Aviation Operations

The main focus of these forecasts will be the number of general aviation operations projected to use the air carrier runways, since this will affect the future capacity of the air carrier runways. It is not expected that the introduction of a new fleet of Very Light Jets, will have a major impact on operations at the main commercial airports, as these types of operations are more likely to use the region's reliever general aviation airports for air taxi and other types of operations.