



2016 2040 RTPSCS

REGIONAL AVIATION FORECASTS UPDATE

Aviation Technical Advisory Committee

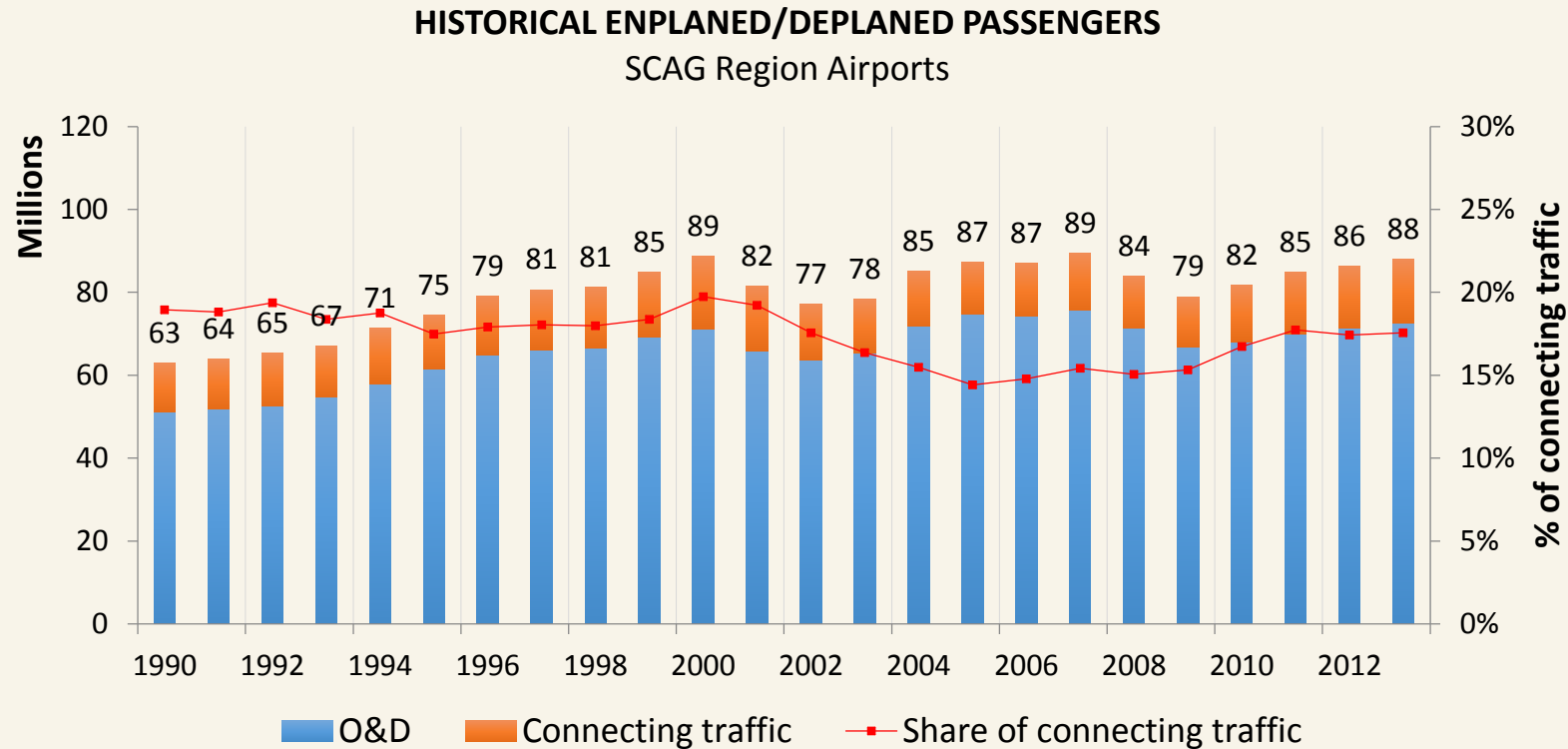
Mr. Ryan N. Hall
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June 25, 2015

Recap of Transportation Committee (6/4/15)

- Aviation Program Vision and Goals for the 2016 RTP/SCS
 - Urbanized/constrained capacity analysis
 - Economic, demographic and historical inputs for the regional aviation demand forecast
 - Historical regional forecasts in the 2004, 2008 and 2012 RTP's
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- Staff is scheduled to present at the next Transportation Committee meeting on July 2, 2015

Historical SCAG Region Aviation Growth

Total enplaned traffic at SCAG Region Airports increased from 63.0 MAP in 1990 to 88.0 MAP in 2013



Regional Aviation Forecasts

Recap of April 23, 2015 presentation

- Forecast methodology is based on relationship between regional, national, and international economies and demand for air travel



Overall Regional Aviation Forecast for 2040

Total O&D passenger movements to the region increase from:

72.6 MAP in 2013 to

112.2 MAP in 2040

(Equivalent to annual growth of 1.6%)

Total enplaned/deplaned passengers increase from:

88.0 MAP in 2013 to

136.2 MAP in 2040

(Equivalent to annual growth of 1.6%)

Airport Specific Demand Forecasts (2040)

Unconstrained

- What would happen if each airport could physically accommodate all passengers who desire to use it, and there were no legal/policy constraints?

Physical/policy constraints

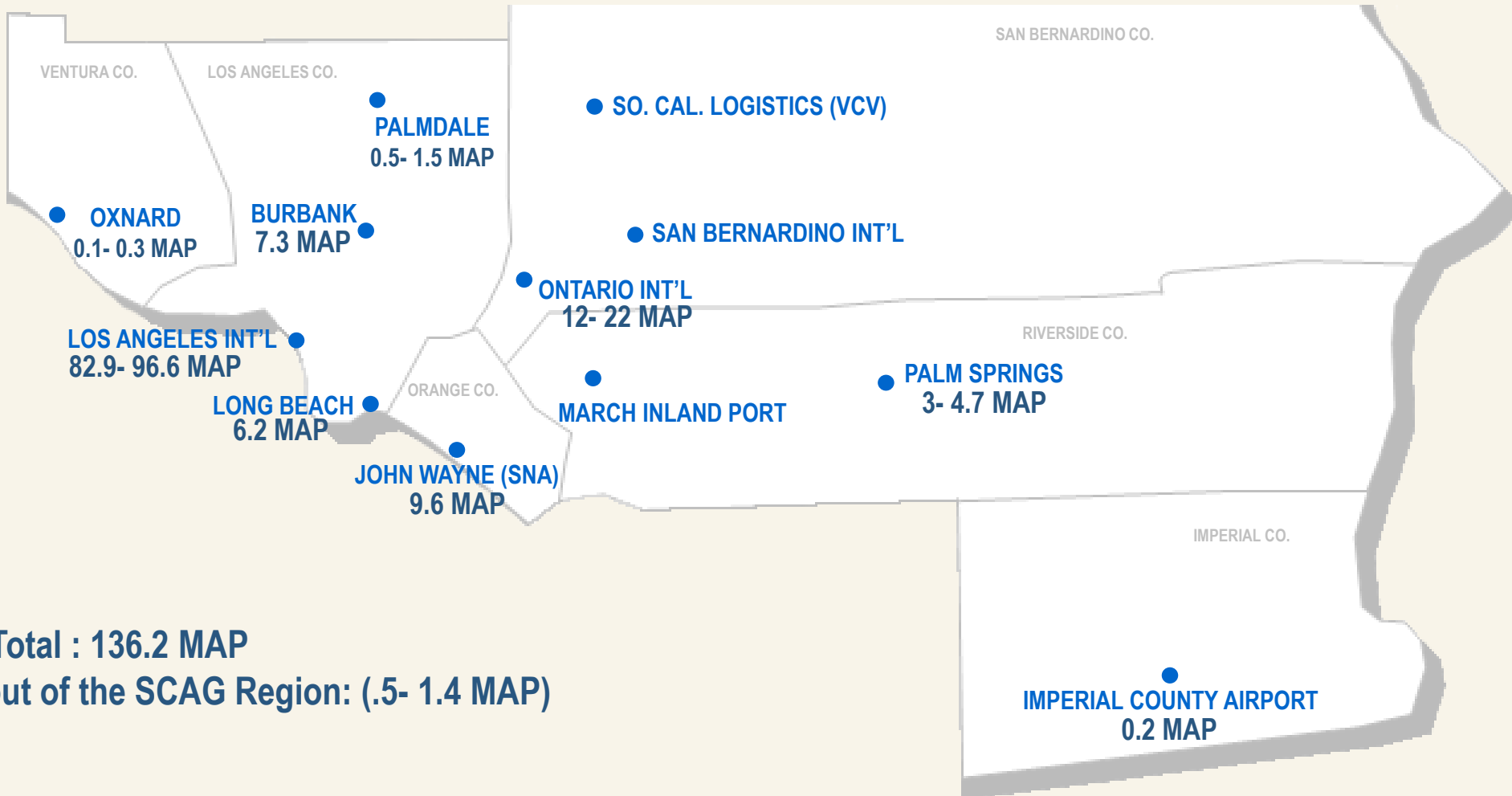
- Physical constraints on airfield and terminal remain
- Legal/policy constraints without a sunset date remain (LGB, SNA)
- Constraining airports in the region could result in unmet demand

“New Hub” Option

- What would happen if a low-cost carrier established a new hub serving the West Coast, Mexico or Canada?
- Potential for new/additional nonstop markets and economic growth

Draft Aviation Demand Forecasts (2040)

Range of Policy Options (MAP, Million Annual Passengers)



Regional Total : 136.2 MAP

Leakage out of the SCAG Region: (.5- 1.4 MAP)

Next Steps

- Incorporate feedback from ATAC for the Transportation Committee (TC) presentation scheduled for July 2, 2015
- Finalize the ground access element
- Prepare trip tables for the travel demand model
- Perform the economic impact analysis task
- Review and update the air cargo and general aviation sections of the plan
- Prepare the Aviation Element of the 2016- 2040 RTP/SCS for review and approval by TC

2016
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Thank you!

Learn more about the SCAG Aviation Program by visiting www.scag.ca.gov or contact:

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