

# Ground Access to Major Airports by Public Transportation:

A Report on ACRP Project 11-02

A Presentation to the IARO Conference, 2007  
Los Angeles, California

*By*

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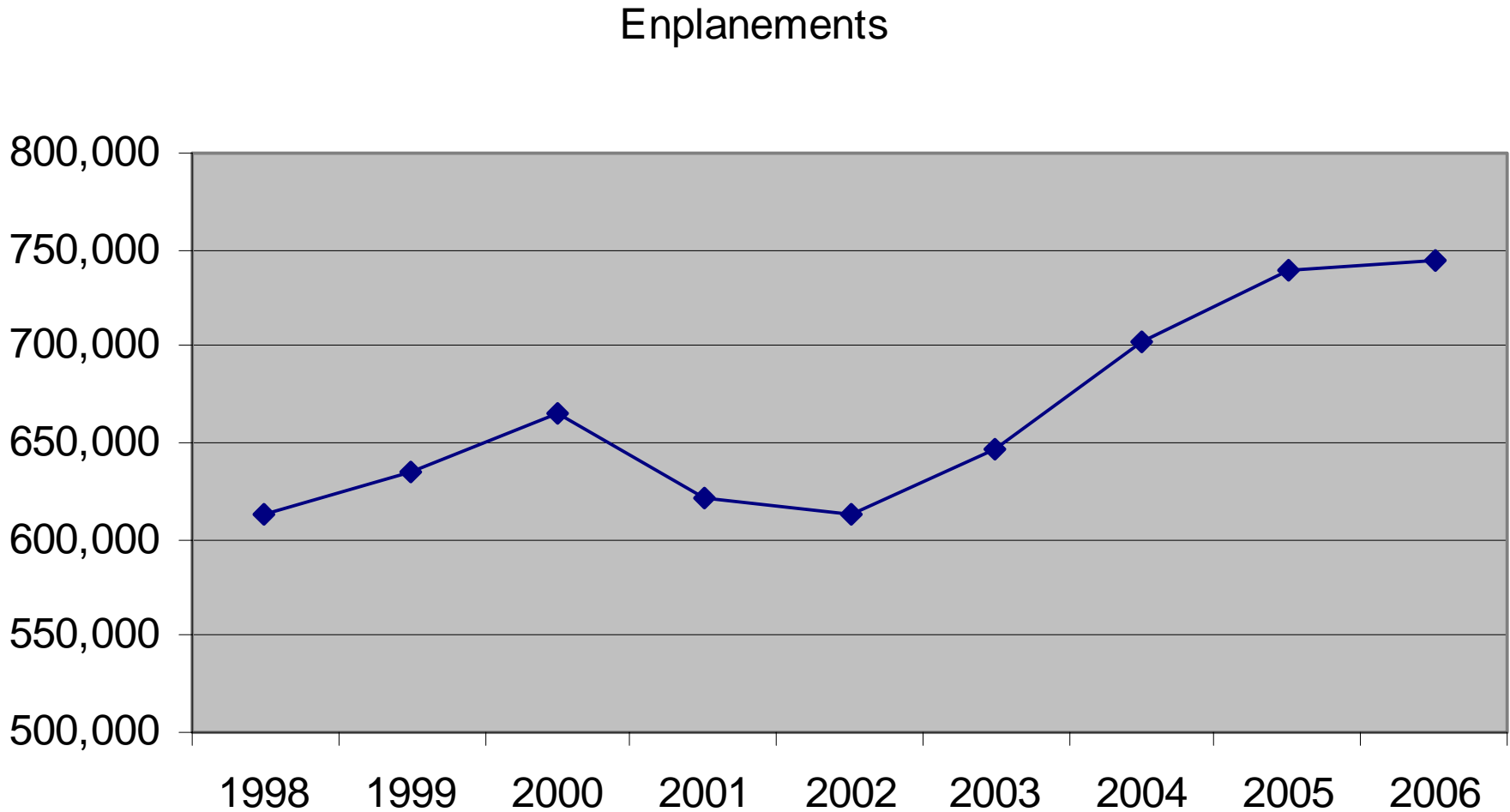
June 15, 2007

# Los Angeles/Ontario Presentation

- An international review of market share, from the Airport Cooperative Research Project
- Domestic (American) market share
- An update on airline operated off-site check in

# Enplanements: The Last Decade

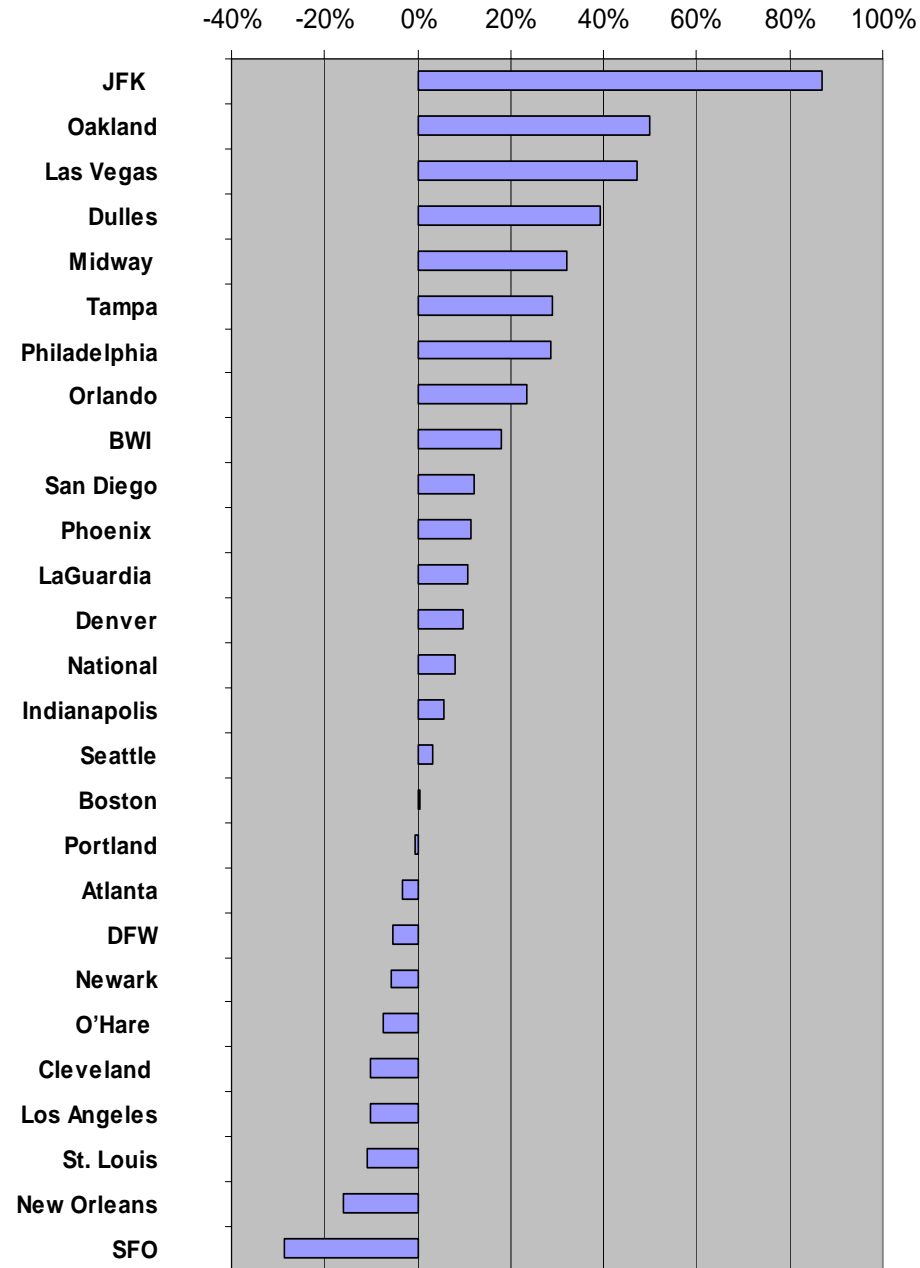
- Nationally, the recovery was strong...



# Trends: Originations

- Originations at large airports, historically served by good public modes, did not bounce back uniformly

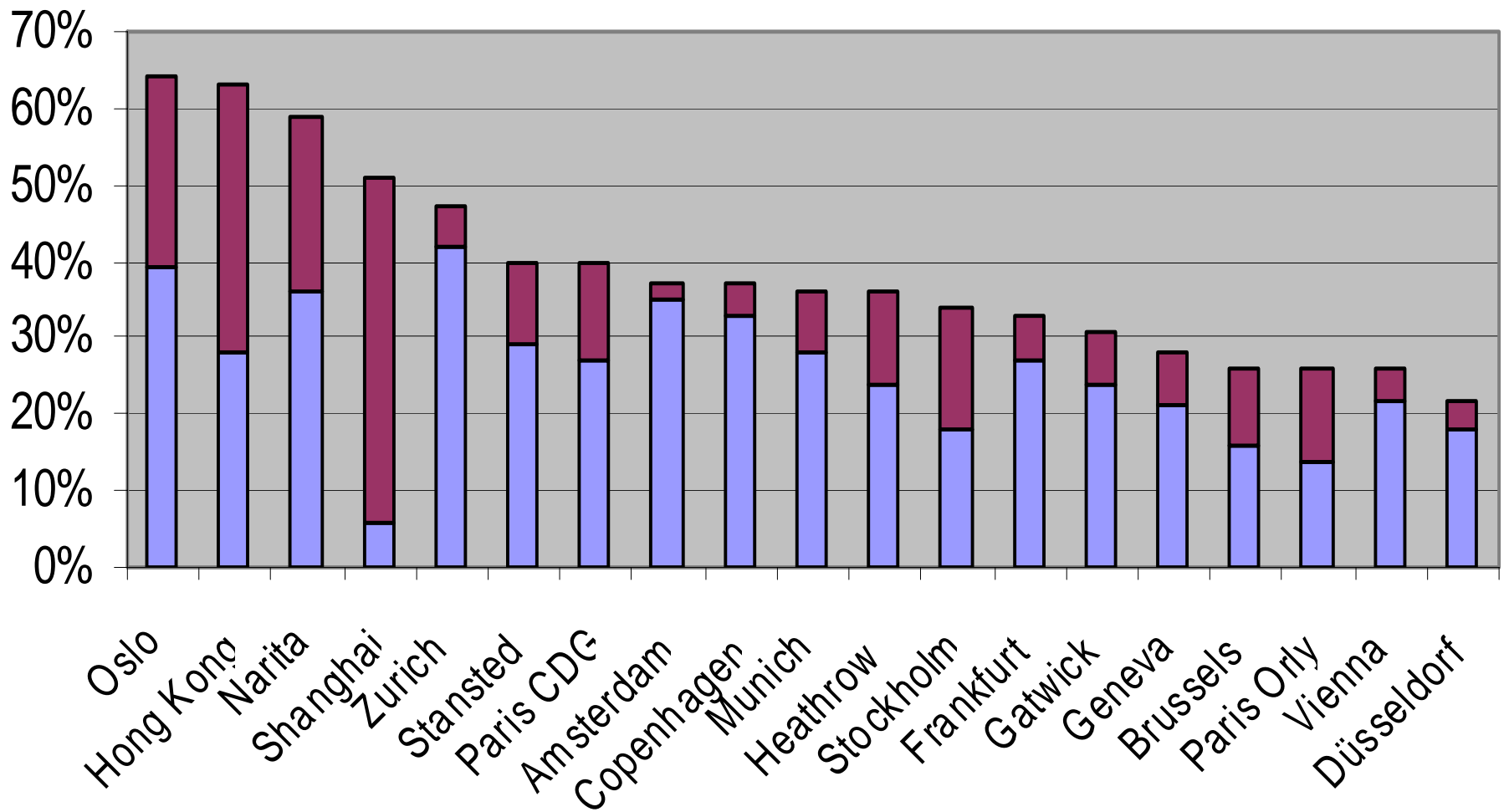
Growth In Originations 1998 - 2005



# International Market Share

- Public Transportation= rail plus bus

Rail Bus/Van



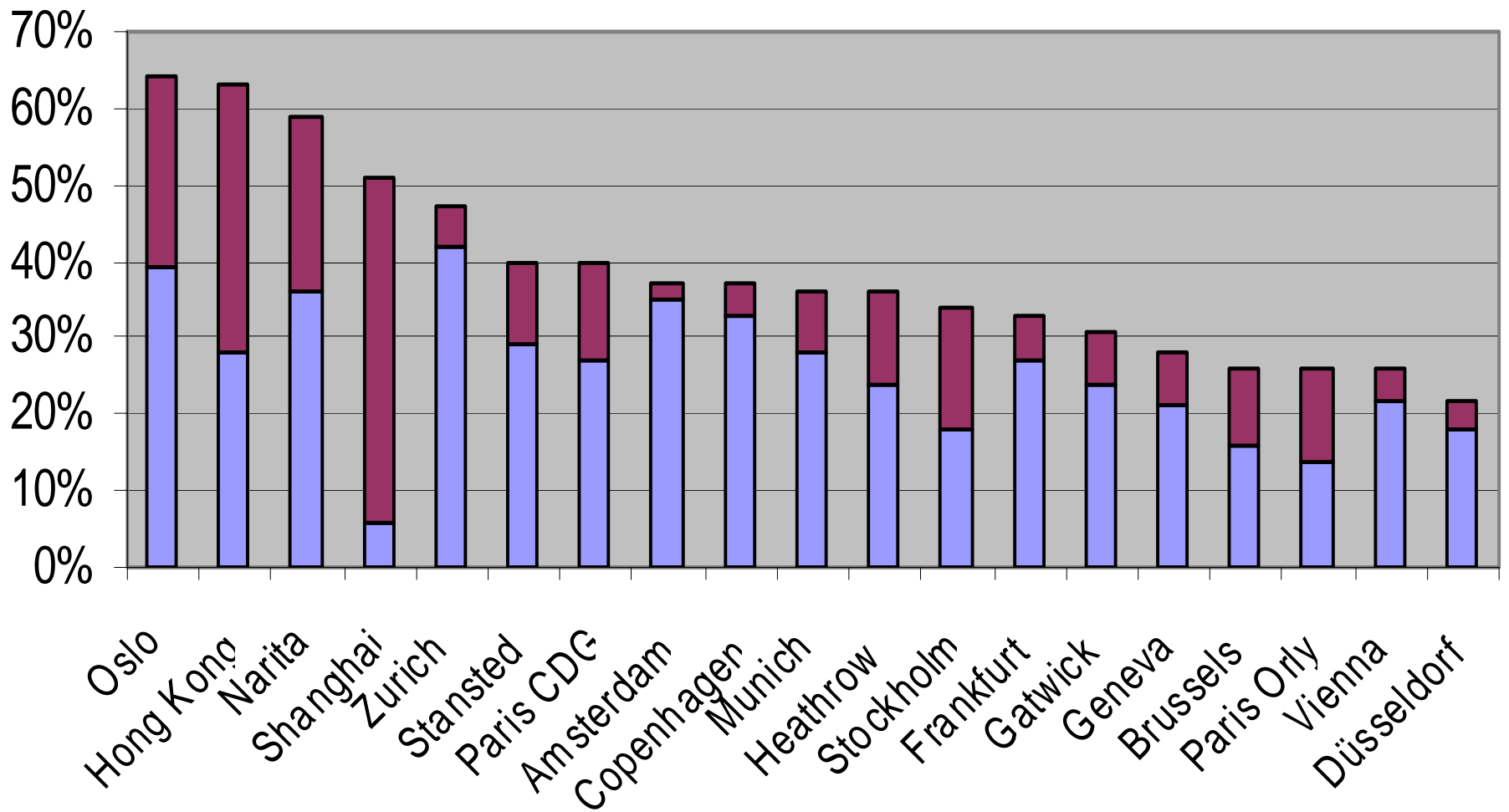
# Understanding the Role of Speed



<i><b>Airport</b></i>	<i><b>Rail Share</b></i>	<i><b>Speed</b></i>
Zurich	42%	42
Oslo	39%	95
Tokyo Narita	36%	44
Amsterdam	35%	42
Copenhagen	33%	32
Munich	31%	26
Stansted	29%	53
Paris CDG	28%	26
Hong Kong	28%	55
Frankfurt	27%	30
Heathrow	Express 9%	60
(23%)	Tube 14%	20
Shanghai		
Maglev	6%	135

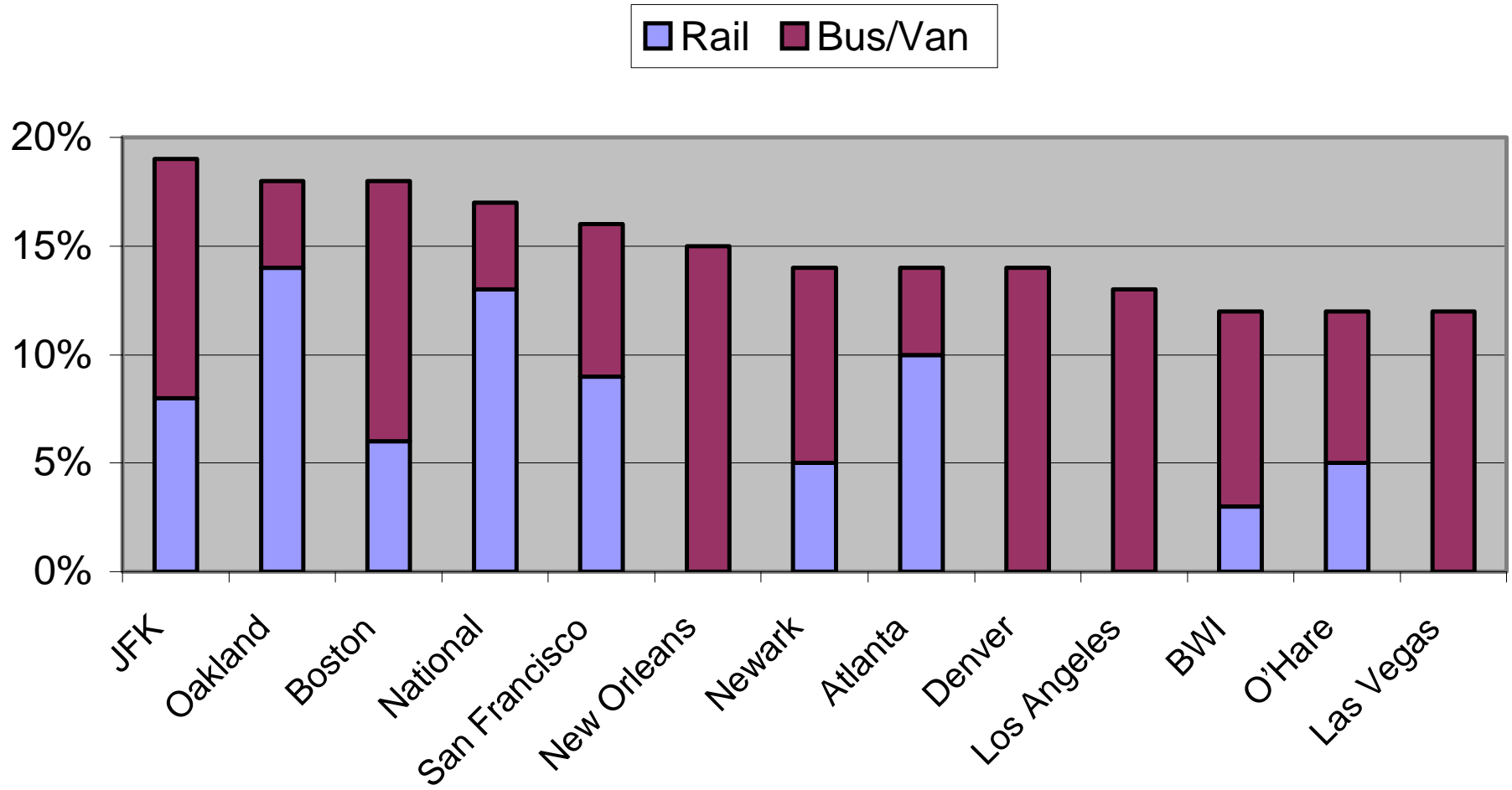


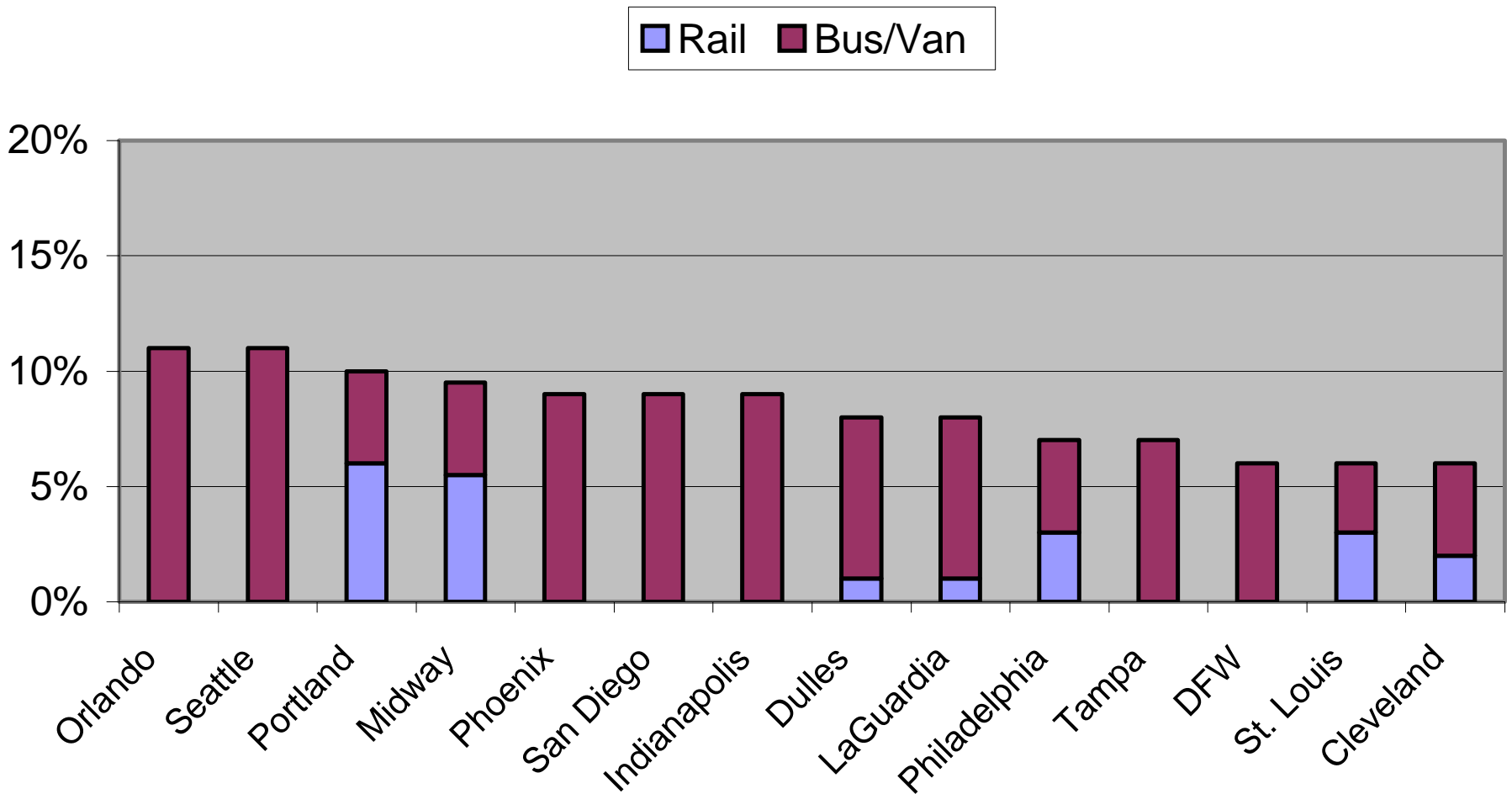
□ Rail    ■ Bus/Van



# American Market Share

- Public Transportation= Rail, plus bus, plus van





# Understanding Market Scale

## Some Definitions

- “Primary Market Area”
  - Usually, the geographic area which makes up 80% of a line’s ridership
  - Often defined as “logical catchment area”
    - The geographic area from which the service makes logical sense
- The following slide shows the scale of daily trips to the airport from the Primary Market Area

# Understanding Market Scale

- Heathrow – 21,000 passengers
- LaGuardia– 16,000 passengers
- Stockholm– 13,500 passengers
- Oslo– 12,000 passengers
- JFK –12,000 passengers
- Chicago O’Hare– 10,600 passengers
- Gatwick – 5,500 passengers
- Chicago Midway– 6,000 passengers
  
- Denver– 2,000 passengers
- Portland PDX –1,500 passengers

# Understanding Market Scale

- *New York Shared Concept– 28,000 passengers*
- Heathrow – 21,000 passengers
- *Chicago Shared Concept– 16,000 passengers*
- LaGuardia– 16,000 passengers
- Stockholm– 13,500 passengers
- Oslo– 12,000 passengers
- JFK– 12,000 passengers
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# Actual Volume of Public Transportation by Airport

1	JFK	2.2
2	Los Angeles	2.1
3	Las Vegas	2.0
4	Atlanta	1.9
5	Boston	1.9
6	O'Hare	1.8
7	Orlando	1.5
8	Newark	1.5
	San	
9	Francisco	1.4
10	Denver	1.4

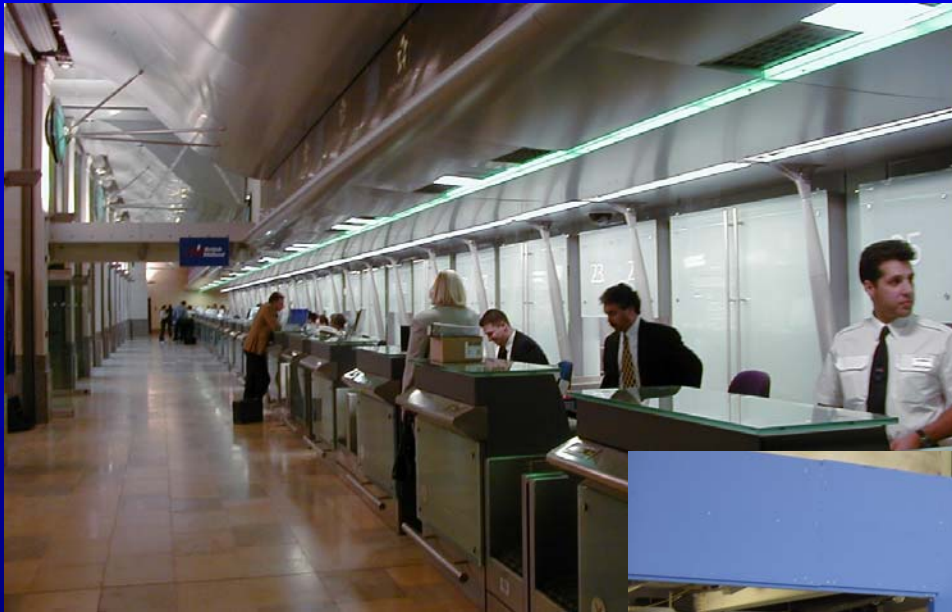
# The Role of Off-Airport Airline Managed Check-in

- Survivors

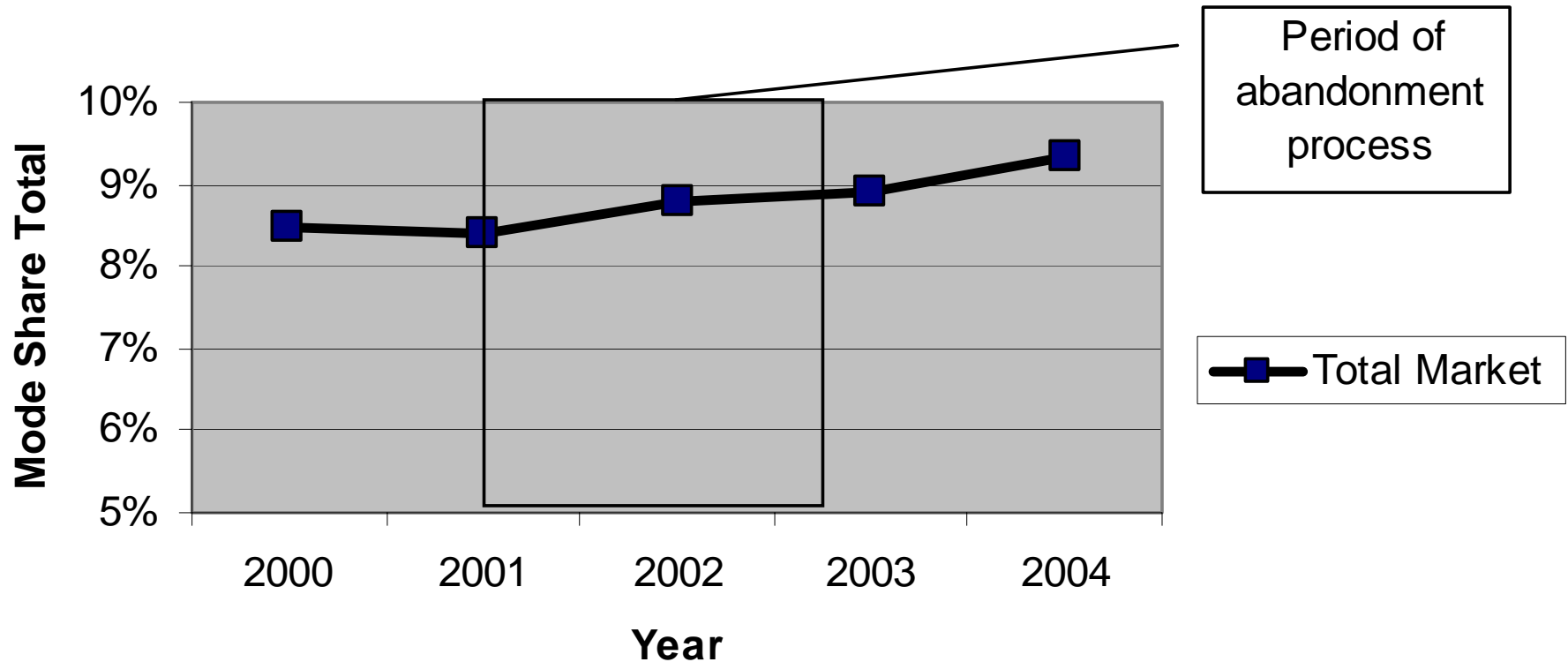
- Hong Kong
- Kuala Lumpur
- Vienna
- Moscow

- Fatalities

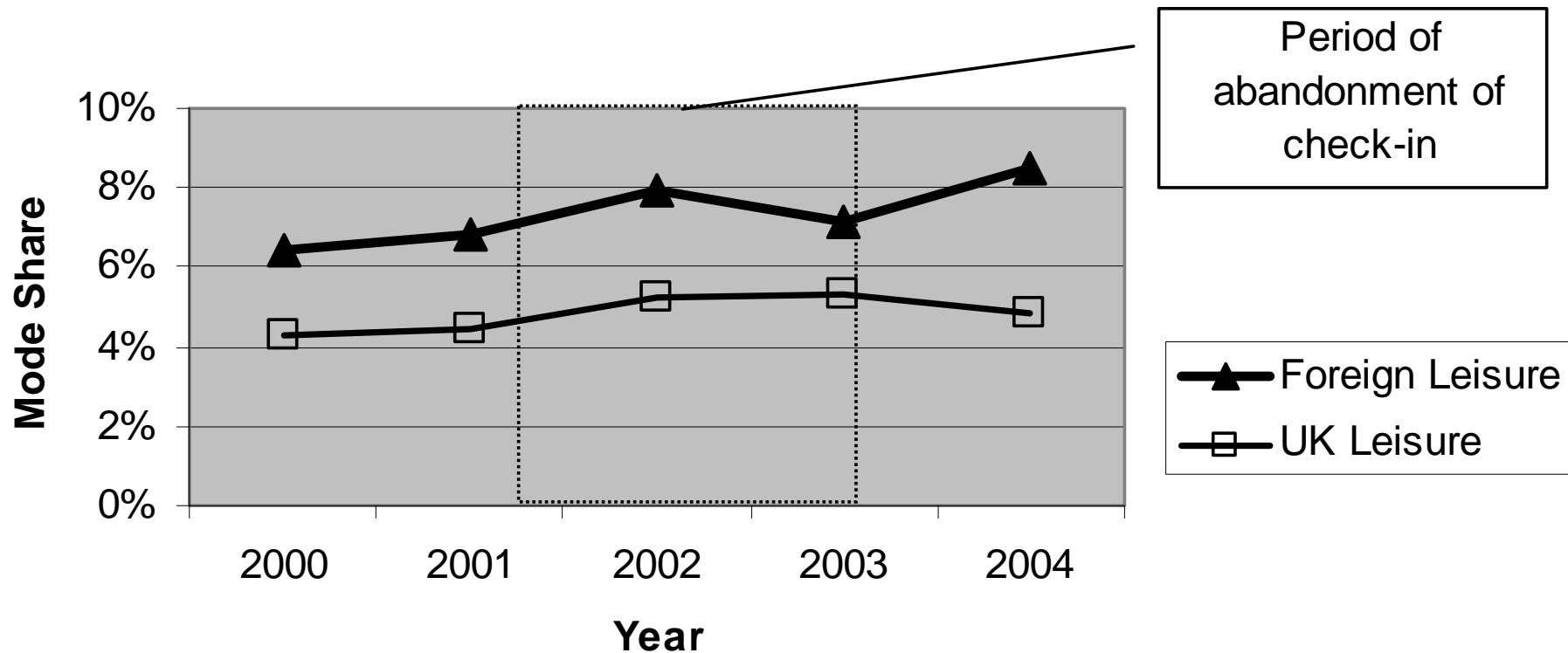
- Heathrow
- Gatwick
- Tokyo City
- Düsseldorf
- Newark
- JFK
- Osaka Namba



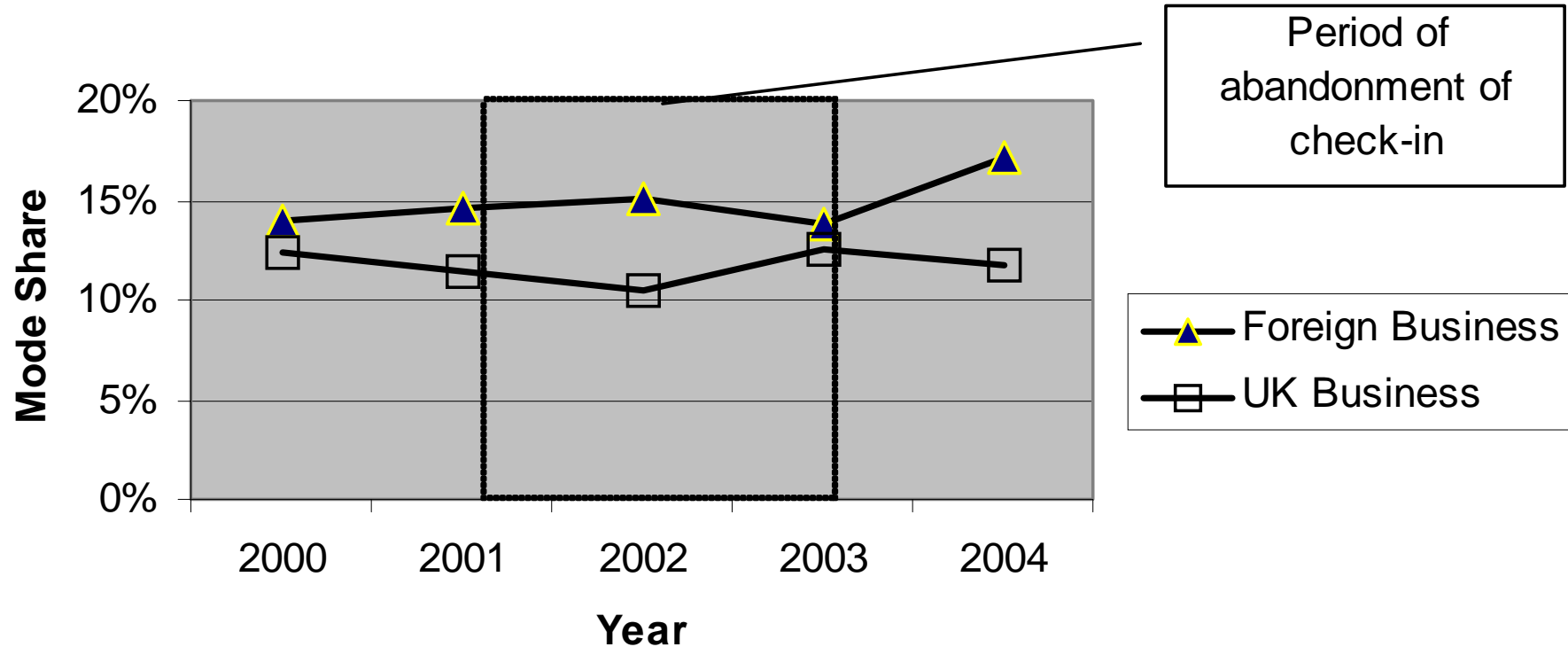
## Impact of Loss of Baggage Check-in at Off-airport Terminal Heathrow Express Ridership



## Impact of Loss of Baggage Check-in at Off-airport Terminal on Leisure Mode Share



## Impact of Loss of Baggage Check-in at Off-airport Terminal on Business Mode Share



## *Special thanks to...*

- The ACRP
  - The IARO
  - The I-95 Corridor Coalition
- and,
- The sponsors of the year 2000 study including the managers of airport railways serving:
    - Gatwick
    - Heathrow
    - Oslo
    - Stansted
    - Stockholm Arlanda