

CHAPTER 4: REGIONAL ACTIVITY

Introduction to Special Emphasis Regions

The four Special Emphasis Regions represent key centers of population, employment and economic activity in Washington

The Washington State legislature (ESSB 5121) designated four geographic regions in the state for special attention in the Long-Term Air Transportation Study (LATS). These four regions, known as Special Emphasis Regions (SER) in the study, constitute key centers of population, employment and economic activity in Washington. Continued economic and population growth in these regions will result in increasing demand for commercial passenger service, air cargo, and general aviation activity. Without adequate air transportation, the future growth of population and overall economic conditions in the four regions could be adversely impacted, which in turn could affect the health of the overall state economy. It is therefore deemed essential to ensure that airport facilities within these regions support current conditions, as well as future needs.

The four designated Special Emphasis Regions, shown in Exhibit 4-1 below, are:

1. **Puget Sound:** consisting of King, Snohomish, Pierce, and Kitsap Counties
2. **Southwest Washington:** consisting of Clark and Cowlitz Counties
3. **Spokane:** consisting of Spokane County
4. **Tri-Cities:** consisting of Benton and Franklin Counties

Exhibit 4-1: Washington Special Emphasis Regions

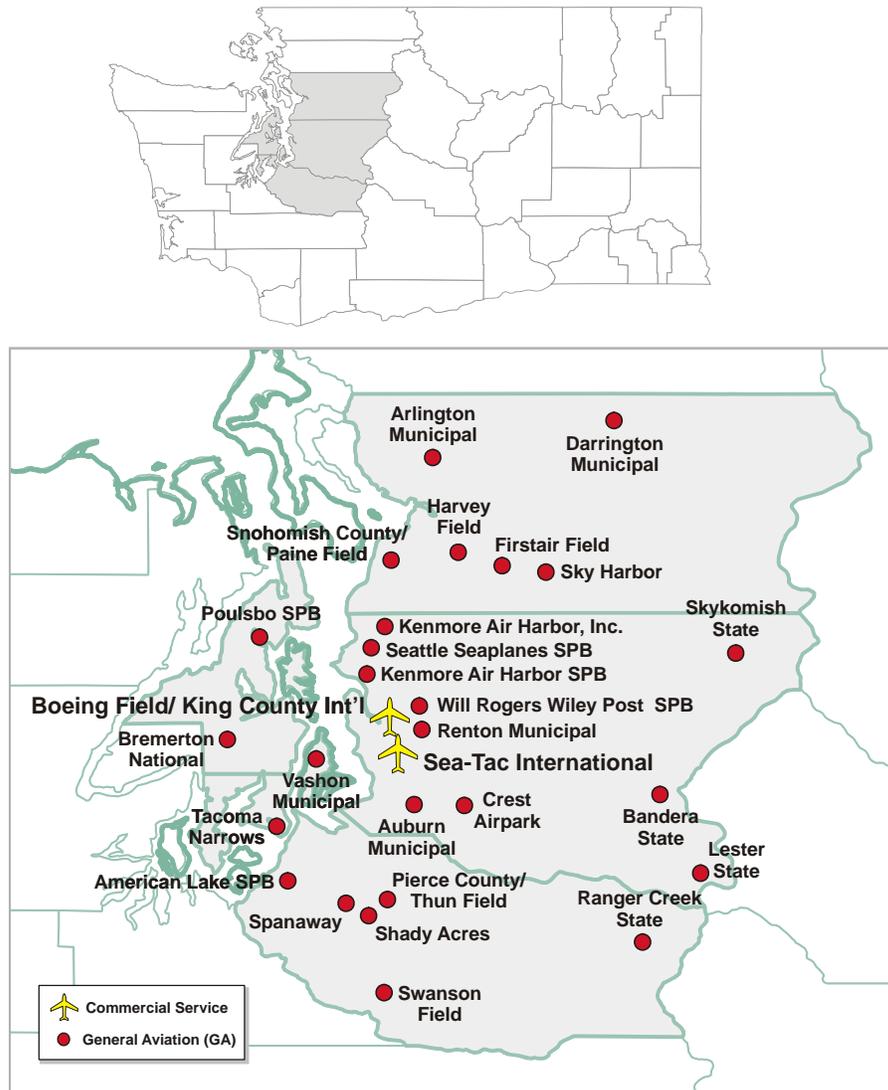


Puget Sound Region

Puget Sound is the busiest aviation area in Washington, accounting for the bulk of commercial passenger and cargo activity in the state

Puget Sound represents the most populated region in Washington State and the busiest aviation area. The Special Emphasis Region encompasses King, Snohomish, Pierce, and Kitsap Counties. The Seattle-Tacoma-Bellevue metropolitan area – the largest economic, cultural and educational center in the Pacific Northwest – is located in the region. In 2005, the population in Puget Sound totaled 3.5 million, approximately 55 percent of total Washington State population. With population and economic growth driving demand for air service, Puget Sound has the largest concentration of airports in Washington and accounts for the bulk of the commercial passenger and cargo traffic in the state, as well as a significant portion of the general aviation (GA) traffic.

Exhibit 4-2: Puget Sound Region



There are 28 public use airports in the Puget Sound Special Emphasis Region. Commercial service facilities include Seattle-Tacoma International, the main commercial airport in Washington, as well as Boeing Field and two Kenmore Air seaplane base facilities. There are also 7 regional service airports, 2 community service, 11 rural essential airports, and 5 seaplane bases in the region. The airports are listed in Exhibit 4-3 below.

Exhibit 4-3: Airports in the Puget Sound Region SER

Num	Airport	City	County	WSDOT Service	NPIAS Service
1	American Lake SPB	Tacoma	Pierce	Seaplane Base	None-NPIAS
2	Arlington Municipal	Arlington	Snohomish	Regional Service	GA
3	Auburn Municipal	Auburn	King	Regional Service	Reliever
4	Bandera State	Bandera	King	Rural Essential	None-NPIAS
5	Boeing Field/King County International	Seattle	King	Commercial Service	Primary
6	Bremerton National	Bremerton	Kitsap	Regional Service	GA
7	Crest Airpark	Kent	King	Rural Essential	None-NPIAS
8	Darrington Municipal	Darrington	Snohomish	Local Service	None-NPIAS
9	Firstair Field	Monroe	Snohomish	Community Service	None-NPIAS
10	Harvey Field	Snohomish	Snohomish	Regional Service	Reliever
11	Kenmore Air Harbor SPB	Seattle	King	Commercial Service	None-NPIAS
12	Kenmore Air Harbor, Inc.	Kenmore	King	Commercial Service	GA
13	Lester State	Lester	King	Rural Essential	None-NPIAS
14	Pierce County/Thun Field	Puyallup	Pierce	Community Service	GA
15	Poulsbo SPB	Poulsbo	Kitsap	Seaplane Base	None-NPIAS
16	Ranger Creek State	Greenwater	Pierce	Rural Essential	None-NPIAS
17	Renton Municipal	Renton	King	Regional Service	Reliever
18	Sea-Tac International	Seattle	King	Commercial Service	Primary
19	Seattle Seaplanes SPB	Seattle	King	Seaplane Base	None-NPIAS
20	Shady Acres	Spanaway	Pierce	Rural Essential	None-NPIAS
21	Sky Harbor	Sultan	Snohomish	Rural Essential	None-NPIAS
22	Skykomish State	Skykomish	King	Rural Essential	None-NPIAS
23	Snohomish County/Paine Field	Everett	Snohomish	Regional Service	Reliever
24	Spanaway	Spanaway	Pierce	Rural Essential	None-NPIAS
25	Swanson Field	Eatonville	Pierce	Rural Essential	None-NPIAS
26	Tacoma Narrows	Tacoma	Pierce	Regional Service	GA
27	Vashon Municipal	Vashon	King	Rural Essential	GA
28	Will Rogers Wiley Post SPB	Renton	King	Seaplane Base	None-NPIAS

What's Going On Now?

Approximately 14.3 million annual enplanements were reported in the region in 2005, representing 87% of the 16.5 million total annual enplanements reported in the entire state.

In 2005, Puget Sound accounted for 46.8 percent of Washington's total GA based aircraft and 45.7 percent of statewide GA operations.

The bulk of Washington's air cargo activity takes place in the Seattle area. In 2005, Sea-Tac and Boeing Field accounted for approximately 373,200 tons and 124,600 tons of air cargo respectively, together representing 83 percent of the state's total air cargo tonnage. Spokane accounted for most of the remaining 16 percent of state's air cargo tonnage..

The Puget Sound Regional Council has been active in airport planning and development issues for the 28 airports within their region...

Looking Ahead

Four airports in Puget Sound are expected to exceed 100 percent of their operating capacity by 2030. These four airports are the only facilities in Washington expected to exceed their operating capacities through the end of the planning period. They include:

- Seattle-Tacoma International
- Boeing Field
- Harvey Field
- Kenmore Air Harbor Inc.

In regards to Seattle-Tacoma International, forecasts adopted for LATS indicate that the airport will reach capacity before 2030. Recent trends observed at the airport, however, including larger aircraft sizes and higher load factors suggest that capacity will be reached sometime beyond the 2030 planning period.

Four airports within the Puget Sound Special Emphasis Area either currently exceed or are expected to exceed their peak hour passenger capacity by 2030. The four airports include the following:

- Boeing Field/King County International
- Kenmore Air Harbor, Inc.

- Kenmore Air Harbor Seaplane Base
- Seattle-Tacoma International

With the exception of Seattle-Tacoma International, the passenger terminal expansions required are not significant and may be accommodated within the existing airport footprint.

While the Puget Sound Region as a whole is not expected to exceed aircraft storage capacity by the year 2030, there are ten airports (36 percent of the total airports in the region) in the region that are expected to be at capacity or exceed capacity by the year 2030. The ten airports include the following:

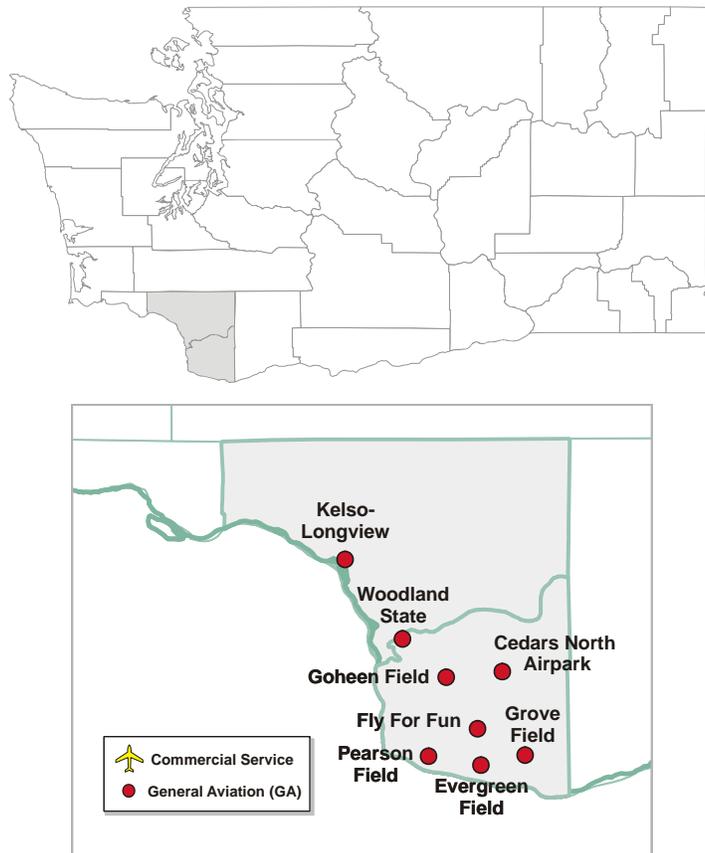
- Boeing Field/King County International
- Crest Airpark
- Firstair Field
- Kenmore Air Harbor, Inc.
- Renton Municipal
- Seattle-Tacoma International
- Seattle Seaplane Base
- Swanson Field
- Shady Acres
- Vashon Municipal

Southwest Region

Challenges in Southwest Washington include the vulnerability of airports to closure, expansion limitations, and the increasing influence of neighboring Oregon airports

The Southwest Region, which borders the high population area of Greater Portland, Oregon, is another important aviation area in Washington. The Special Emphasis Region encompasses Cowlitz and Clark Counties and includes seven general aviation airports that are highly active, down from eight at the start of the study. This area is one of the fastest growing regions in Washington with an expected income growth of 3.4% per year through 2030, compared to a 1.5% statewide average. Current population is approximately 500,000 and is expected to grow to over 780,000 by 2030. Unique challenges faced by airports in Southwest Washington include the vulnerability of privately-owned airports to closure, expansion limitations for airports, and the increasing influence of neighboring Oregon airports.

Exhibit 4-4: Southwest Region



The seven public use airports in the Southwest Washington Special Emphasis Region are listed in Exhibit 4-5 below. Evergreen Field was also originally included in LATS, but was closed in July 2006.

Exhibit 4-5: Airports in the Southwest Washington SER

Num	Airport	City	County	WSDOT Service	NPIAS Service
1	Cedars North Airpark	Battle Ground	Clark	Rural Essential	None-NPIAS
2	Evergreen Field	Vancouver	Clark	--	None-NPIAS
3	Fly For Fun	Vancouver	Clark	Rural Essential	None-NPIAS
4	Goheen Field	Battle Ground	Clark	Rural Essential	None-NPIAS
5	Grove Field	Camas	Clark	Community Service	GA
6	Kelso-Longview	Kelso	Cowlitz	Regional Service	GA
7	Pearson Field	Vancouver	Clark	Community Service	GA
8	Woodland State	Woodland	Cowlitz	Local Service	None-NPIAS

What’s Going On?

In 2005, four of the airports in the region were private owned, making these facilities particularly vulnerable to closure due to land use encroachment issues around the airport.

- Evergreen Airport was the first private airport in Southwest Washington to close due to competing land uses. Evergreen was sold by its owner to a developer offering a favorable economic offer. Accommodating up to 245 based aircraft at its peak in the early 2000, the airport officially closed in July of 2006, shortly after the start of LATS.

The majority of GA airports in the region have limited ability to expand their operations in the future.

- Woodland State Airport is owned and operated by the State. The Airport is located between the Lewis River and the I-5 corridor and consists of a single runway. The airport does not meet current standards and there is no available capacity to address airside or landside facilities.
- Pearson Airport is located in the City of Vancouver and is the oldest public use airport in the state. The National Park Service owns a significant portion of the airport with plans to expand Fort Vancouver. The operations at the airport will be limited by Congressional action beginning in 2022.
- The remaining private airports have insufficient areas for airside and landside development to support the airport due to competing residential development. These facilities also accommodate significant through-the-fence development from nearby residential uses.

Capacity and demand within the Southwest Region is complicated by the fact that the dominant airport for the region is located in another state. The Portland International Airport (PDX) is just south of the region, across the Columbia River. Although separated from Washington by the river and a political boundary, Portland International Airport provides all passenger and cargo service for the region. Additionally, general aviation demand and capacity are influenced by the three active GA facilities located within the state of Oregon and controlled by the Port of Portland that provide capacity for GA growth in this region. The future capacity of these airports are unknown.

Looking Ahead

Based aircraft in the region are forecast to grow from approximately 400 in 2005 to over 600 in 2030, representing a 1.7 percent average annual growth. This is the fastest based aircraft growth among the special emphasis regions and higher than the statewide average of 1.5 percent.

Two of seven airports in the region, Pearson Field and Goheen Field, are expected to exceed aircraft storage capacity by 2030.

GA operations in the region are expected to continue to grow fast at an average of 1.6 percent per year.

A major concern for the region is ensuring that Southwest Washington airports be able to accommodate the growing regional business needs of the Vancouver urban area in the future.

- In the early 1990's the Federal Aviation Administration worked with Clark County officials towards locating and building a new airport north of the City of Vancouver along the I-5 corridor. The project never progressed to the construction phase due to significant opposition by the public.
- Five of the existing seven airports in the region have expansion limitations.
- The other two airports Grove Field and Kelso/Longview are located on the extreme edge of the special emphasis area and may not be well-situated to accommodate the demand from Vancouver. While Kelso/Longview Airport is designated as a Regional airport, further analysis is also needed to determine whether the airport can develop into a regional service facility. The Kelso/Longview Airport is currently in the process of updating their Airport Master plan.

Spokane Region

Continued economic development and an increase in tourism will continue to drive growth in both commercial service and general aviation demand in Spokane

Spokane is the second largest city in Washington and the metropolitan center of the Inland Northwest region. The Special Emphasis Region identified by the legislature encompasses the county of Spokane. The population in the region was approximately 440,000 in 2005 and is expected to grow to 557,000 by 2030. Steady development in the business sector and a new rise in tourism in the area will continue to drive growing commercial service and general aviation demand in Spokane. Spokane International Airport currently serves as the primary commercial airport in Eastern Washington, offering good connections to Seattle-Tacoma International and service to eight other destinations in the U.S.

Exhibit 4-6: The Spokane Region



There are five public use airports in the Spokane Special Emphasis Region. See a list of the airports in Exhibit 4-7 on the following page. Fairchild Air Force Base, currently one of the largest refueling wings in the Air Force, is also located within the region.

Exhibit 4-7: Airports in the Spokane SER

Num	Airport	City	County	WSDOT Service	NPIAS Service
1	Cross Winds	Clayton	Spokane	Rural Essential	None-NPIAS
2	Deer Park Municipal	Deer Park	Spokane	Regional Service	GA
3	Felts Field	Spokane	Spokane	Regional Service	Reliever
4	Mead Airport	Mead	Spokane	Rural Essential	None-NPIAS
5	Spokane International	Spokane	Spokane	Commercial Service	Primary

What's Going On Now?

Spokane accounted for 1.6 million passenger enplanements or close to 10 percent of Washington State enplanements in 2005.

Spokane also handles a significant amount of the state's air cargo activity. In 2005, Spokane International processed approximately 93,400 tons of air cargo (16 percent of statewide air cargo tonnage). The three airports of Seattle-Tacoma International, Boeing Field and Spokane International together handle 99 percent of Washington's air cargo.

The Spokane region represents the second largest concentration of based GA aircraft within Washington after Puget Sound, accounting for 579 based aircraft in 2005 (7.1 percent of statewide based aircraft).

Looking Ahead

Commercial passenger service demand will grow rapidly in Spokane through the next 25 years. Expected growth in passenger enplanements will be the fastest in Washington at 3.2% per year, compared to 2.5% in Puget Sound and 2.6% statewide average.

In 2030, the Spokane region is still expected to account for the second largest concentration of based GA aircraft in the state. Based aircraft in the region is expected to grow to 768 by 2030 (6.5 percent of 2030 statewide based aircraft).

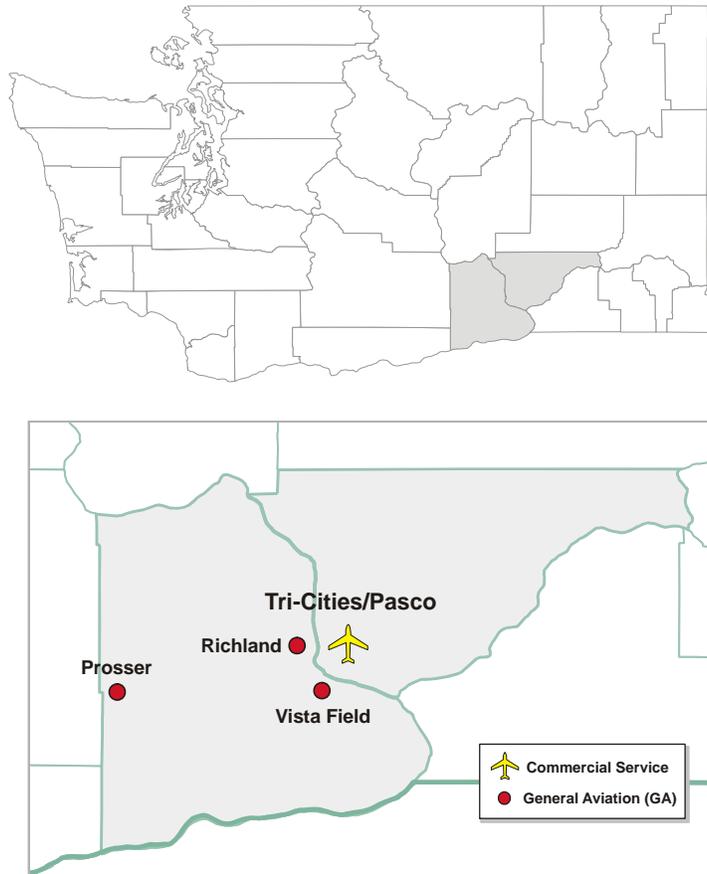
Three of the five airports in the Spokane Region are expected to be at or exceeding aircraft storage capacity by 2030. Felts Field is expected to have a shortfall of approximately 130 hangars by 2030.

Tri-Cities Region

Tri-Cities will see steady economic and population growth, and is home to Tri-Cities Airport, the third largest commercial airport in Washington

The Tri-Cities Special Emphasis Region encompasses Franklin and Benton Counties and contains the main metropolitan area in Southeastern Washington. The population in the region in 2005 was approximately 220,000. Steady population growth at 1.5% per year is expected through 2030, together with high annual employment growth of 1.8% and annual income growth of 3.0%. The Tri-Cities Airport is the third largest commercial airport in Washington State, currently serving four U.S. destinations including Seattle, Salt Lake City, Denver, and Minneapolis.

Exhibit 4-8: The Tri-Cities Region



The four public use airports in the Tri-Cities Special Emphasis Region are listed in Exhibit 4-9 on the following page.

Exhibit 4-9: Airports in the Tri-Cities SER

Num	Airport	City	County	WSDOT Service	NPIAS Service
1	Prosser	Prosser	Benton	Community Service	GA
2	Richland	Richland	Benton	Community Service	GA
3	Tri-Cities	Pasco	Franklin	Commercial Service	Primary
4	Vista Field	Kennewick	Benton	Community Service	None-NPIAS

What's Going On Now?

In 2005, approximately 239,300 commercial passenger enplanements were reported in Tri-Cities.

There were 284 GA based aircraft based in the region in 2005.

In recent years, the City of Kennewick has held discussions with the Port of Kennewick and community leaders regarding the possible closure of Vista Field to make way for commercial development.

- Vista Field serves the general aviation needs of the Kennewick community and is currently one of twenty airports in the state that have air cargo feeder service. The airport has significant off-site aviation dependent businesses. The airport was purchased in the early 1990's by the Port of Kennewick from the City of Kennewick.
- Substantial development may be required at the Richland Airport to accommodate demand from Vista Field. •Questions regarding whether or not nearby airports such as Richland and TriCities are prepared to construct additional facilities to accommodate aviation activity from Vista Field have yet to be answered. Regional coordination is needed to address access, airport facilities needs and land use encroachment.

Looking Ahead

Commercial passenger traffic in the region is expected to grow at 2.1% per year through 2030, slightly below the state average of 2.6%. Passenger terminal peak hour demand at Tri-Cities Airport in 2030 will exceed current terminal peak hour capacity, but required terminal expansions are not significant.

No other capacity constraints are expected in the region over the next 25 years.

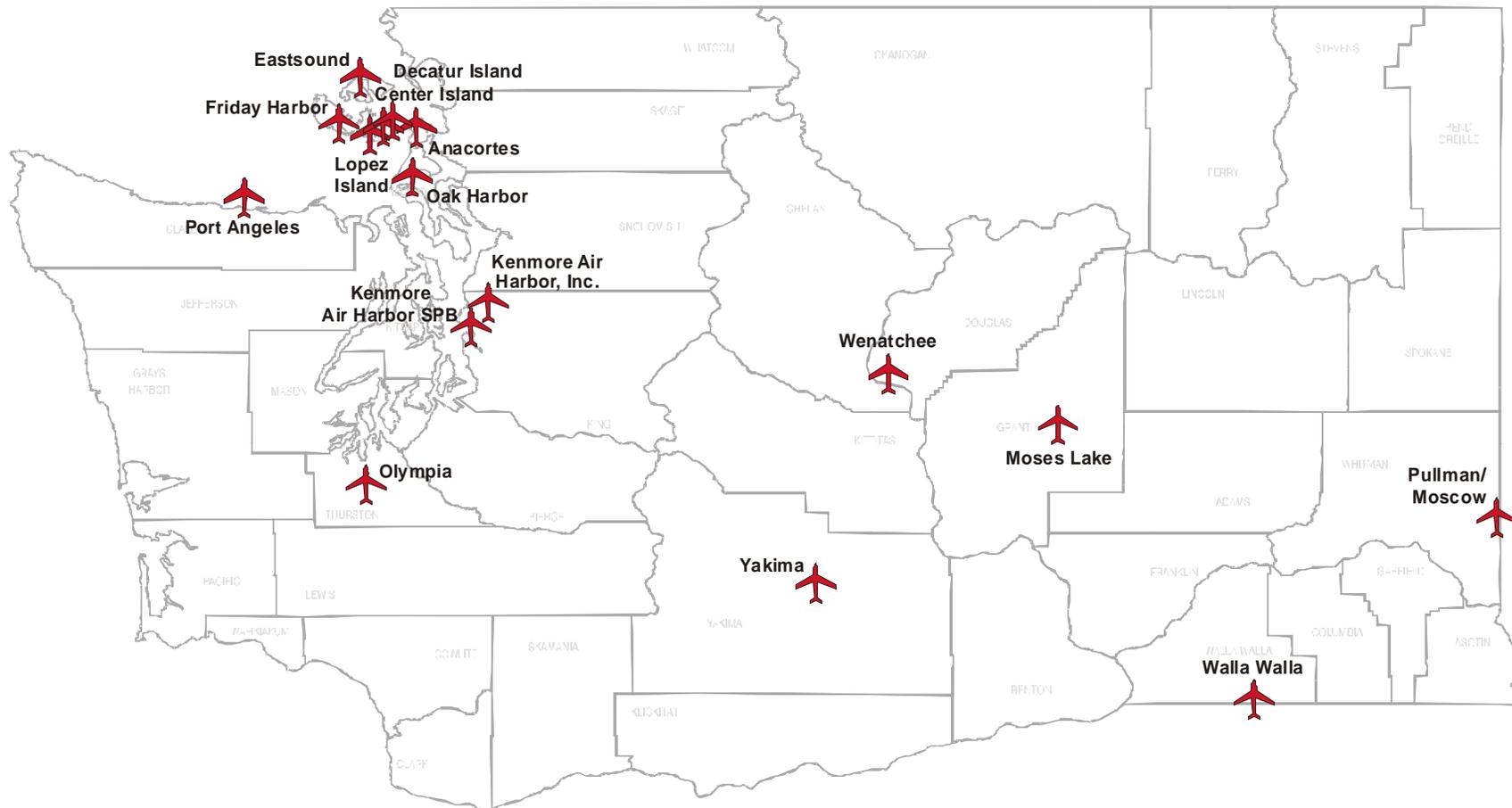
Other Regions of the State

Like other states, many small communities in Washington have lost significant scheduled passenger air service over the past 10-15 years. The trend of commercial service loss has been mainly seen in small communities outside of the four special emphasis regions. Five small commercial airports have lost all scheduled airline service since 1995. See Exhibit 4-10 on the following page.

- Factors contributing to the loss of service at these small communities include proximity to larger surrounding airports that draw passengers from the natural market areas of the smaller airports, increases in aircraft size within the fleets of regional airlines that can lead to reductions in flight frequency at smaller airports, and volatile fuel prices and increasing fare competition at hub airports that have stressed the operating economics of regional carrier feed services from smaller airports.
- In many cases, competing carriers have exited the market completely, leaving a single carrier which has reduced flight frequency while substituting larger aircraft.
- Moses Lake is set to regain commercial air service after a two year hiatus. Subsidized by the Federal Essential Air Service Grant, SkyWest will begin Seattle service from Grant County International in June 2009.

The 14 Regional Transportation Planning Organizations (RTPO's) in Washington are active in developing regional transportation plans. RTPOs coordinate regional planning among cities, counties, port authorities,

Exhibit 4-10: Small Commercial Airports in Washington That Have Lost All or Significant Commercial Scheduled Service, August 1995 – August 2005



Significant growth in GA based aircraft and GA activity is expected in many regions of the state.

- The fastest based aircraft growth in Washington is expected in Clallam County (2.3% per year), Mason County (2.2%), Grant County (2.2%), and Thurston County (2.1%). Average statewide based aircraft growth is forecast at 1.5% per year through 2030.
- Thurston RTPO will have the fastest based aircraft growth among RTPOs. Based aircraft in Thurston are forecast to grow from approximately 250 in 2005 to over 400 in 2030.
- Following Puget Sound and Spokane, Benton-Franklin-Walla Walla and Quad-County RTPOs currently have the largest GA based aircraft fleets in the state. This is expected to continue through 2030, with Benton-Franklin (approximately 670 based aircraft) and Quad-County (660 based aircraft) each accounting for close to 6 percent of 2030 total state based aircraft..
- In terms of GA operations, the next most active RTPO after Puget Sound is Quad-County RTPO. In 2005, approximately 252,700 GA operations were reported in Quad-County, representing 8.5 percent of statewide GA operations. An annual growth of 1.4% is expected, resulting in over 360,000 GA operations in 2030 – making Quad-County represent the second largest concentration of GA operation still.

Plans for a new regional airport in Northeastern Washington have yet to move forward.

- LATS has determined Northwest Washington lacks a regional airport facility that is necessary to provide adequate access to the region.
- As early as the 1970s the City of Colville has recognized the limitations of the Colville Airport to expand and accommodate business aircraft.
- In the mid 1990's the Federal Aviation Administration worked with officials from the City of Colville to locate a new airport in Colville. After completion of a fairly extensive environmental review process, however, City official withdrew from the negotiations.
- In 2006, the City of Colville completed an update of their Airport Master Plan. The Master Plan showed that the proposed airport site did not meet the minimum requirements for a regional airport due to terrain constraints and the location of a major highway in the area.

- In 2006 WSDOT funded an updated Airport Layout Plan that confirmed the Colville Airport would have difficulty meeting FAA design standards and was encroached by incompatible land use.
- In 2009 WSDOT funded a feasibility study for a new airport site recognizing the difficulty in overcoming the constraints of the existing airport facility.
- Discussions have begun between the City of Colville, WSDOT, and the FAA to consider a new effort to conduct an alternative site analysis for a new Colville airport.