

Long-Term Air Transportation Study (LATS) Overview

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Long-Term Air Transportation Study (LATS) Overview

Aviation Planning Takes Off *Long-Term Air Transportation Strategy Will Guide Aviation's Future in Washington State*

Washington's airports are valuable transportation assets and economic engines. Every day, they play a crucial role locally, statewide, and nationally by moving people and goods, promoting business and commerce, and contributing to our quality of life. Washington's airports also provide access for critical services such as emergency medical, search and rescue, firefighting, and disaster management activities that other transportation modes could not adequately accommodate.

Most people take for granted that they can count on reliable air transportation, but Washington's airports and aviation system are experiencing major problems because of deferred maintenance and high levels of growth.

Washington's aviation system must be sustained because it is an essential component of our state's overall transportation system. The important role of aviation is highlighted in Governor Gregoire's strategic economic plan and the Washington State Legislature's call in 2005 for a Long-Term Air Transportation Study (LATS).

The LATS study began in response to the growing recognition that Washington's network of 141 public use airports needs to be managed as an integrated system, to more strategically invest the public resources necessary to preserve future aviation capacity. Through LATS, the legislature required the Washington State Department of Transportation (WSDOT) Aviation Division to assess existing capacity and implement a state aviation plan to determine long-term air transportation needs and ensure that Washington's aviation system can effectively serve future demand.

Over the past two years, WSDOT's Aviation Division has been conducting studies to assess existing capacity, forecast future demand, and determine long-term air transportation needs. These technical studies will help the governor and state legislature to make decisions and target investments that effectively serve the future air transportation needs of Washington.

A newly appointed Washington State Aviation Planning Council will review the data gathered in LATS Phases I and II and make recommendations to the governor, state legislature, transportation commission, and regional transportation planning organizations about capital investment strategies and policies needed to maintain a healthy aviation system.

Washington State Aviation Planning Council Members

Carol Moser (Chair),
*Washington State Transportation
Commission Member*

John Sibold, *WSDOT Aviation
Director*

Juli Wilkerson, *Director,
Washington State Department
of Community Trade and
Economic Development (CTED)*

Paul A. Roberts, *City of
Marysville Public Works
Director/Everett City Council
Member*

John Townsley, *U.S. Forest
Service/Private Pilot*

David Fields, *Carter and
Burgess/FAA Technical Expert*

Gratton O. Sealock (Neal),
*Spokane International Airport
Manager*

James McNamara, *Western
Growth Management Hearings
Board (GMHB) Member*

Penelope L. Loomis, *Deer
Park Airport Manager/Airport
Management Association
Representative*

Donald Garvett, *Alaska
Airlines/Airline Representative*

Three Phase Approach to LATS

LATS is being developed in three phases. Each phase answers one of the three basic questions fundamental to the development of a systemwide approach to managing Washington's aviation resources.

Phase I: What do we have?

Performed a statewide airport facilities and capacity assessment, including an analysis of current utilization.

Completed September 2006

Phase II: What do we need?

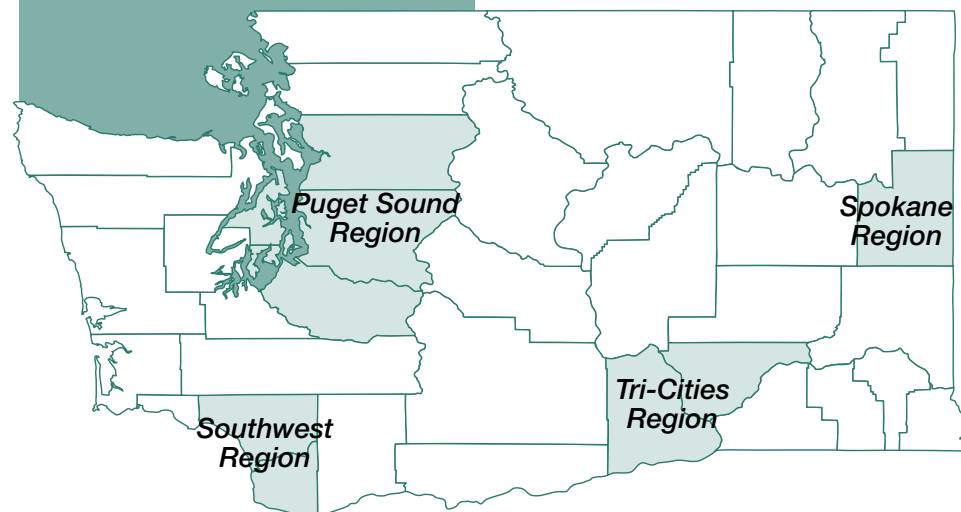
Developed 25-year market forecasts of each airport in Washington State, including forecast of aircraft operations, passengers, and air cargo. In addition, the role of high-speed passenger rail was assessed for its ability to relieve future constraints in aviation system capacity

Completed July 2007

Phase III: How will we get there?

The Washington State Aviation Planning Council will consider the LATS Phases I and II findings as well as public input. This data and information will be used to shape future aviation policy and recommend how best to meet the state's long-term commercial and general aviation airport needs consistent with ESSB 5121.

To be completed July 2009



LATS Phase I evaluated conditions at airports statewide, with a more detailed focus on four key population centers.

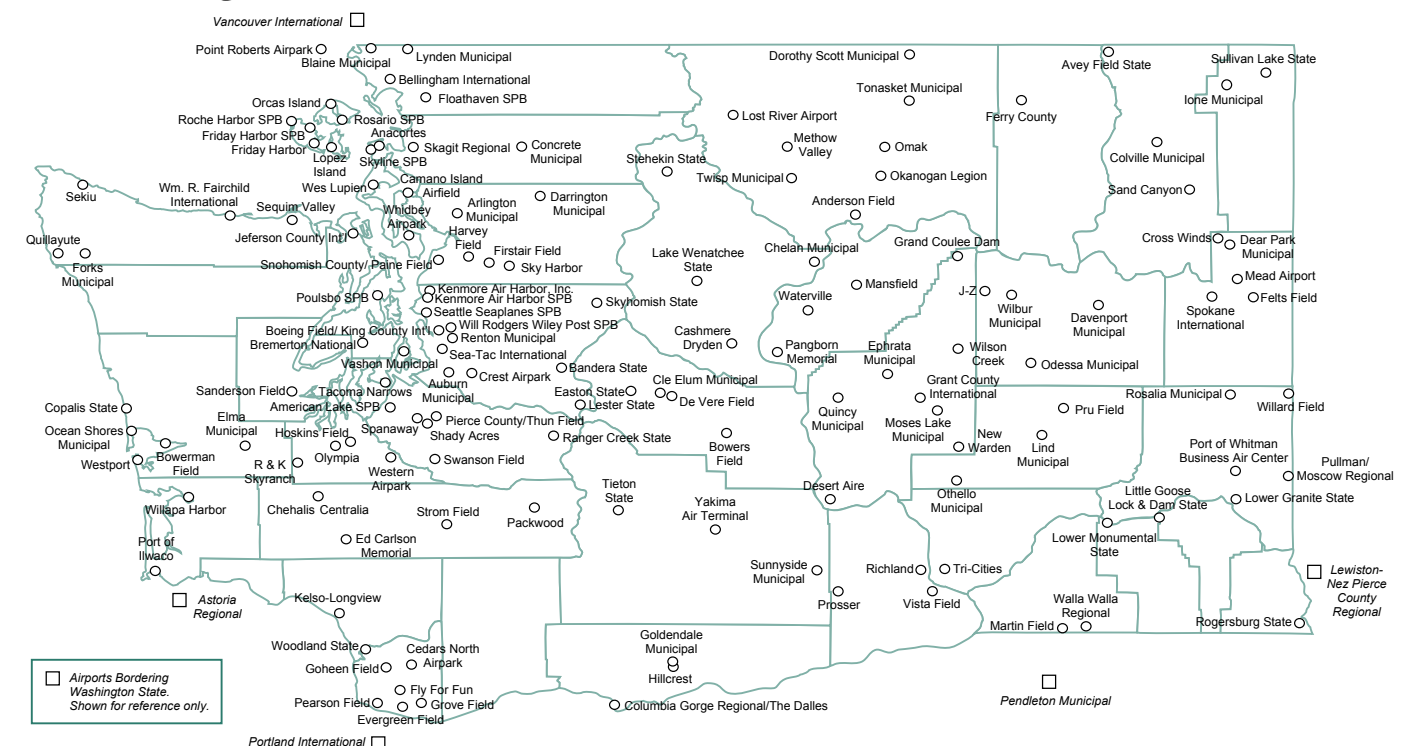
Phase III: How will we get there?

The Washington State Aviation Planning Council will identify priority areas for aviation development and investment in our state with regard to existing or long-range airport needs. In accordance with Engrossed Substitute Senate Bill 5121, the Council is required to:

- Make recommendations, based on the findings of the assessment and analysis completed under Phase I (RCW 47.68.390) and Phase II (RCW 47.68.400), regarding how best to meet the statewide commercial and GA capacity needs;
- Determine which regions of the state are in need of improvement regarding the matching of existing, or projected, airport facilities, and the long-range capacity needs at airports within the region expected to reach capacity before the year 2030;
- Make recommendations regarding the placement of future commercial and GA airport facilities designed to meet the need for improved aviation planning in the region; and
- Include public input in making final recommendations.

The Council's recommended policies and strategies for meeting future statewide aviation capacity needs will be based on the assessment and analysis completed during Phases I and II of LATS, and on additional analyses to be conducted during Phase III. In order for the Council to fulfill its mandate, it must be well informed as to both the nature of specific issues and the implications of alternative strategies that might be pursued in order to address these issues. The Council shall determine the final recommended actions and submit its report to the legislature, governor, Transportation Commission, and regional transportation planning organizations by July 1, 2009. The final Washington State Long-term Air Transportation Plan will be based on action by the governor and legislature.

Washington State Airport Facilities



Long-Term Air Transportation Study (LATS) Overview

Phase I: What do we have?

As the first comprehensive airport system study in Washington State in more than 20 years, it was necessary for LATS to thoroughly evaluate capacity issues and market demand at all levels, from the individual airport level up to the statewide perspective, with a particular focus on Washington's four Special Emphasis Regions where population and aviation activity are concentrated.

LATS also identified capacity issues and their impacts throughout the state. The Phase I assessment includes a statewide analysis of existing airport facilities, and of commercial passenger, air cargo, and general aviation (GA) transportation capacity as of 2005. Phase I also introduced a state airport classification system that helps define the role of individual airports in meeting air transportation needs and their respective functions as part of the statewide system.

What did we learn in Phase I?

Passenger capacity is adequate at Special Emphasis Region Airports with the exception of Seattle-Tacoma (Sea-Tac) and Tri-Cities. Bellingham has also shown signs of peak hour passenger processing capacity constraint at the terminal due to increases in larger jets. Peak hour operations at Sea-Tac and Tri-Cities Airports, both at 68 percent of terminal peak hour capacity as measured by FAA standards, exceed the 60 percent threshold identified by the FAA as the level to initiate planning for new facilities. The FAA also recommends that additional capacity should be in place at the 70 percent capacity level.

With the exception of Boeing Field and Sea-Tac, ample cargo capacity exists statewide. Boeing Field and Sea-Tac are at approximately 80 percent and 60 percent of their respective cargo handling capacities. Meanwhile, many of the state's airports offer large apron areas available for cargo operations but exhibited no current air cargo activity.

Many areas of the state are approaching capacity for GA aircraft storage (hangars). Aircraft storage and parking for all Washington airports has reached 85 percent of its existing capacity. Moreover, approximately 650 individuals are on waiting lists for an aircraft hangar facility at any given time. Aircraft storage is important given the significant role GA plays in Washington (i.e., GA operations represented 80 percent of total Washington operations in 2005).

Six airports appear to be at, or nearing, operational capacity. Boeing Field, Kenmore Air Harbor, and Sea-Tac have the most severe capacity needs. Auburn Municipal, Harvey Field, and Ephrata Municipal have reached, or are approaching, the FAA's 60 percent operational capacity planning threshold.

While individual airports are at various stages of compliance with state planning law, a majority of Washington's airports do not meet all criteria for compatible land use and zoning.

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Phase II: What do we need?

Phase II of LATS focused on understanding the expected future growth in aviation activity on a statewide, regional, and individual airport basis, and identified a series of key challenges and issues that will need to be addressed in order for the state aviation system to effectively meet the future air transportation needs of Washington residents, visitors, and businesses.

The Phase II study also:

- Included a review of national and state aviation trends (both GA and commercial).
- Contained market analyses specifically pertaining to Washington's commercial airports.
- Provided forecasts of future aviation demand in Washington, including airline passenger traffic, air cargo, and GA activity.
- Determined future capacity shortfalls/excess at the individual airport and regional levels.
- Analyzed and updated the State Airport Classification System proposed in Phase I.
- Refined performance objectives designed to quantify current airport system performance and the benefits associated with potential facility enhancements.
- Reviewed current programs to enhance rail service in Washington State and assessed the impact that future rail system development may have on the airport system.

What did we learn in Phase II?

- **Significant capacity constraints are anticipated by 2030.** Airfield capacity constraints are expected at ten airports by 2030 (Arlington Municipal, Auburn Municipal, Boeing Field/King County International, Crest Airpark, Harvey Field, Kenmore Air Harbor SPB, Kenmore Air Harbor, Inc., Sea-Tac, Snohomish County/Paine Field, and Spokane International). Sea-Tac, the largest and busiest airport in Washington, is expected to reach capacity by 2024.
- **By 2030, four of the 20 commercial service airports (Kenmore Air Harbor, Inc., Kenmore Air Harbor SPB, Sea-Tac, and Tri-Cities) will have passenger utilization levels sufficient to warrant an expansion of their terminal facilities.**
- **Approximately one-quarter of Washington's public use GA airports are expected to have GA aircraft storage capacity shortfalls by 2030.**
- **There is a significant imbalance between forecast demand and existing capacity within Washington State's airport system.** For example, Puget Sound supports 87 percent of Washington's scheduled airline passenger traffic, 80 percent of the state's air cargo operations, and 45 percent of the state's GA activity. The smaller, outlying airports in Washington provide more than 60 percent of the state's operations capacity, but accommodate only 25 percent of statewide activity.
- **Trends contributing to the loss of service at smaller commercial service airports in recent years are expected to continue through 2030.** With the exception of Sea-Tac, Boeing Field/King County International, Bellingham, and a number of San Juan Island airports, all other commercial service airports have experienced declines in scheduled airline seat capacity since 1997 and six airports have lost scheduled service entirely.
- **Larger airports (Sea-Tac, Portland, and Spokane) will continue to attract traffic from smaller airports.** These airports remain attractive to passengers for their level of nonstop service and low cost carrier options, compelling travelers to drive longer distances.
- **Air cargo capacity is influenced by geographic location, availability of apron space, and developable land.**
- **Based on the airport performance system developed, it was found that all but 1 percent of Washington's 6.6 million residents live within 90 minutes of a regional or commercial service airport.**
- **Passenger rail improvements will not provide meaningful capacity relief to the air transportation system.**