

Washington State

Aviation Planning Council

Long-Term Air Transportation Study (LATS)

Museum of Flight
Seattle, WA

February 7, 2008

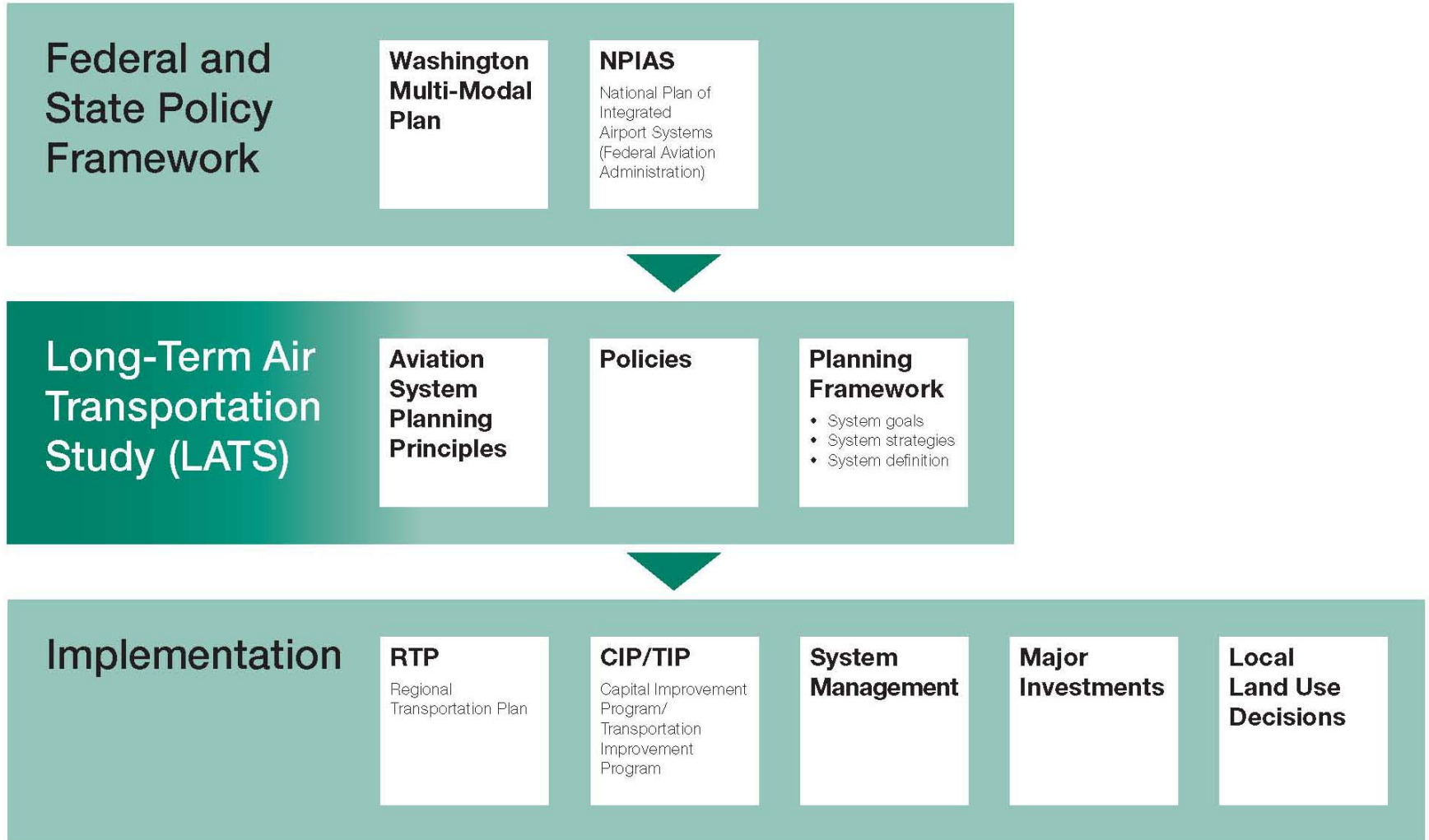


Meeting Objectives

- Review overview state aviation system hierarchy
- Discuss council mission and focus
- Approve charter
- Approve public involvement plan
- Review work program
- Discuss next steps

Aviation System Planning Overview

Aviation System Planning Hierarchy



Panel Discussion

- **Washington Transportation Plan**
 - Paul Parker, Washington State Transportation Commission

- **FAA National Plan**
 - Dennis Roberts, FAA

- **Economic Viability & State Economic Plan**
 - Larry Williams, CTED

Washington Transportation Plan

Guest Speaker: Paul Parker

Comprehensive, balanced, and statewide

a systematic
approach
to moving people and
goods

Washington State
Transportation
Commission



What is the Washington State Transportation Commission?

- **Independent, Governor appointed, geographically balanced citizen board**
- **Prepares a 20 year Comprehensive and Balanced Statewide Transportation Plan (WTP)**
- **Sets ferry fares and highway tolls**
- **Engages in public outreach and provides a public forum for**

The Infrastructure Picture

- Let's start with "How Much?" What do we spend?
 - In 2005, highway and transit investment nationally totaled \$88 billion from federal, state and local sources
 - 2007-09 Washington State Transportation Budget \$7.53 billion

The Infrastructure Deficit

■ What is Needed?

AASHTO estimates annual modal investment needed:

- | | |
|----------------------------------|---------------|
| – Highways and Transit | \$187 billion |
| – Freight Rail (public, private) | \$12 billion |
| – Intercity Passenger Rail | \$3.3 billion |

Steady Growth Forecast in Air Travel

- Growth at certain key hubs will be anywhere from 40% to nearly 70%. Without system improvements delays will cost much more than the \$10 billion estimated last year.
- The Federal Aviation Administration (FAA) reports the number of passengers carried by United States commercial air carriers is on track to hit the one billion mark by 2015 – 8 years from now.

--WSDOT Aviation Update

Washington Transportation Plan

- The PNW shares the national infrastructure challenges.
- Washington has a 20-year plan – strategy outline.
- Comprehensive, balanced, and statewide guide for transportation policy and investment decisions
- Addresses all levels of government
- Looks at private sector needs, investment, and actions

Washington Transportation Plan



- Identifies a need to invest over \$67 billion over the next 20 years
- \$38 billion of which is unfunded

The Washington Transportation Plan

- Existing resources will provide about \$30.5 billion for investments in transportation services and facilities over the next 16 years
- Commission took a strategic approach in establishing some guiding principles for investments



#1: PRESERVATION

- Fundamental transportation investment is system preservation
- Foundation for other investment guidelines

#2: SAFETY

Safety of the traveling public is the state's highest priority



New cable median barrier along I-5 helped prevent this semi truck from crossing the median.

#3: ECONOMIC VITALITY



- Basic user benefits (mainly reduced operating and production costs, reduced passenger and freight delay and reduced accidents)
- Jobs from project construction and the multiplier effect
- Economic productivity increases
- Development for local or regional economies

#4: MOBILITY

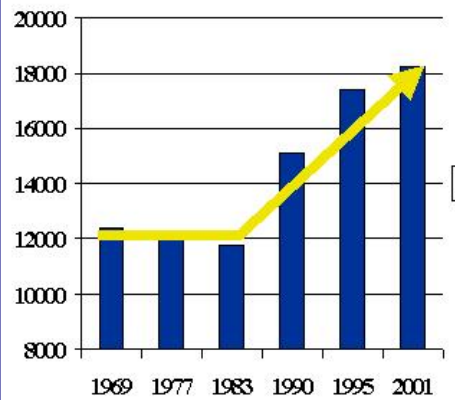
- Provide connectivity and reliability to work, to customers, to friends, to activities, to shopping
- Increase the use of transit to reduce congestion on our most heavily traveled highways



#5: NATURAL ENVIRONMENT & HEALTH

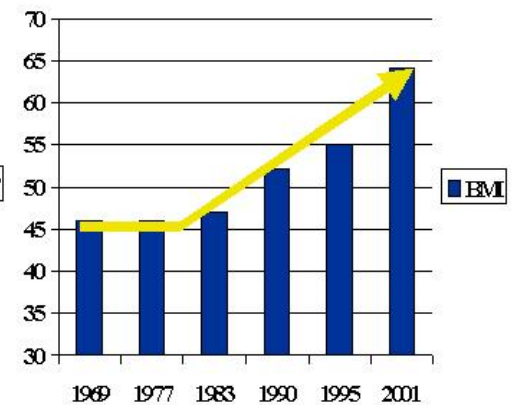


- Transportation systems affect the natural environment and our own health
- Compare growth in Vehicle Miles Traveled (VMT) with growth in obesity



Growth trend for annual household vehicle miles of travel

(50% overall growth)



Growth trend for percent of Americans 'overweight'

(40% overall growth)

Policy recommendations

- **Safety:** Determine needed weather-related improvements to general aviation airports, to make airports safer and more effective.
- **Mobility:** Identify gaps and deficiencies within the air transportation system and provide recommendations on how to address future long-term passenger, air cargo, and airport facility needs



No one single answer



- Commission Tolling Study
- Commission Rail Capacity and Needs Analysis
- Long-term revenue strategies
- Highway System Plan
- Ferry System Plan
- Public Transportation Plan
- LATS
- State Bike-Ped Plan

"Like all public monopolies, highways give you the impression of a free good. They are not.

I ask that we bear in mind one simple adage: just as there is no such thing as a free lunch, there is no such thing as a 'free way.'

The only real questions are: who pays, who benefits, and how much?"

- Senator Daniel Patrick Moynihan, Chairman, Environment and Public Works Committee (1991)
- He successfully led the effort to change the traditional highway bill into an intermodal bill – known as ISTEA.



Time to look at new solutions

- Technology
- Innovation
- Efficiencies
- Partnerships

Technology and Efficiency



Two toll facilities currently underway:

- ❑ Tacoma Narrows Bridge
- ❑ Variable Pricing
 - SR 167 High Occupancy Toll (HOT) Lanes Pilot Project





Moving your perishables on the right track.

Innovation and Partnerships

Railex:

shipping perishable
produce cross-country in
4 to 5 days



Partnerships

- Port of Tacoma, Fife and I-5
- The Grape Line
- Columbia River Crossing



The 2010 WTP

- Early staff work has begun
- Commission will discuss schedule this month
- Early outreach will begin in May
- Adoption in Fall 2010

Key Issues & Challenges

How much growth is projected?

- **Passenger traffic at Washington airports is forecast to increase by 85 percent through 2030, from 17 million to 31 million enplanements**
- **General aviation operations will grow by 1.6 percent annually, from 3.0 million in 2005 to 4.4 million in 2030**
- **Air cargo will grow by 3.5 percent annually, with total statewide air cargo growing from 600,000 tons in 2005 to 1.4 million tons in 2030**

Where will the growth occur?

- **Activity will remain highly concentrated in the Puget Sound Region, which by 2030 will accommodate:**
 - 87% of Washington’s commercial passengers
 - 84% of statewide air cargo
 - 47% of the state’s GA operations

How will the growth be distributed?

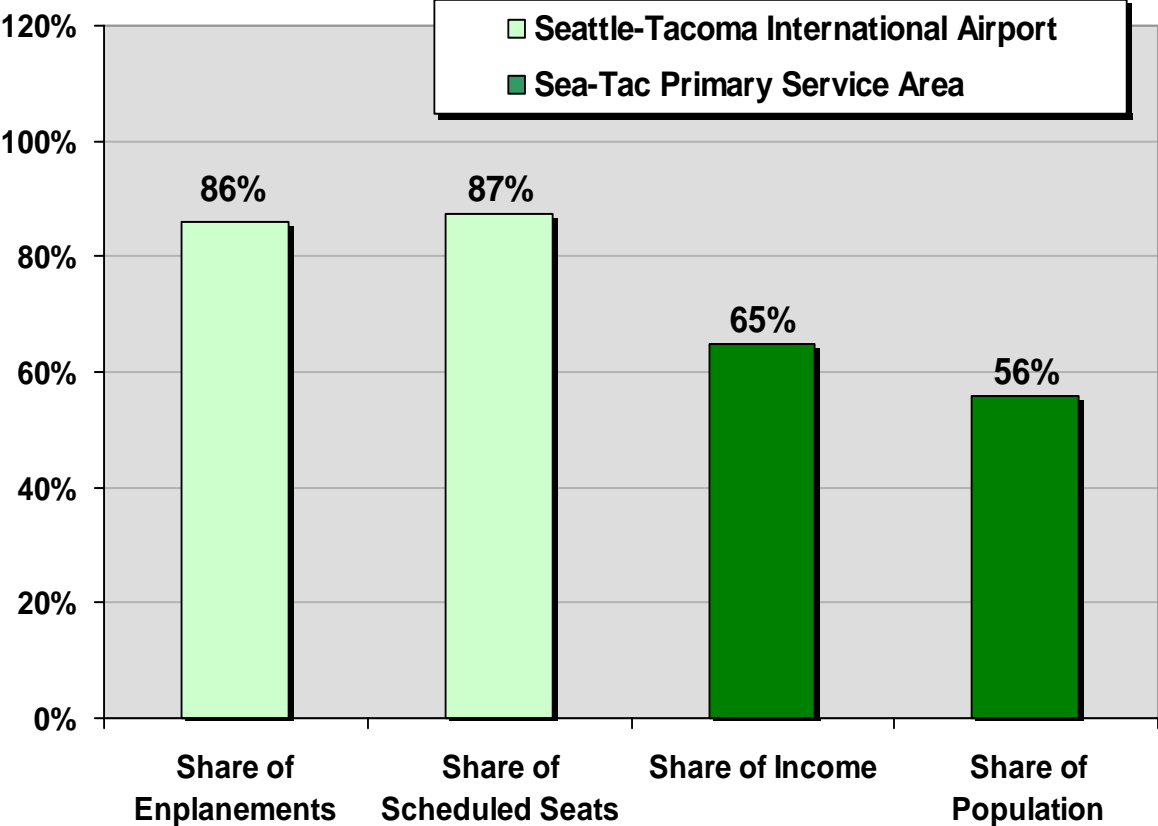
- **The primary capacity issue is the concentration of demand in the most populated regions of the state**
 - The largest airports in the state provide one-third of the state's operations capacity, but attract 75 percent of the demand
 - Smaller, outlying airports in Washington provide over 60 percent of the state's operations capacity, but only generate about 25 percent of the demand

Future Issues and Challenges

- **Significant capacity constraints are anticipated by 2030**
 - Airfield capacity constraints are expected to emerge at ten airports
 - Several of the state's busiest airports including Sea-Tac, Boeing Field, and Harvey Field are expected to reach capacity by 2030
 - Approximately one-quarter of Washington's public-use airports are expected to have aircraft storage capacity shortfalls by 2030
- **Passenger rail improvements will not provide meaningful capacity relief to the air transportation system**
- **Trends contributing to the loss of service at smaller commercial service airports in recent years are expected to continue through 2030**
- **The loss of public use private owned airports which are at higher risk of closure due to land use conflicts or sale for alternative use, could reduce available capacity in high-growth regions**

Sea-Tac Attracts an Extremely High Share of Washington State Passenger Traffic and Service

Sea-Tac Share of State Passenger Traffic & Service vs. Primary Service Area Share of Socioeconomics

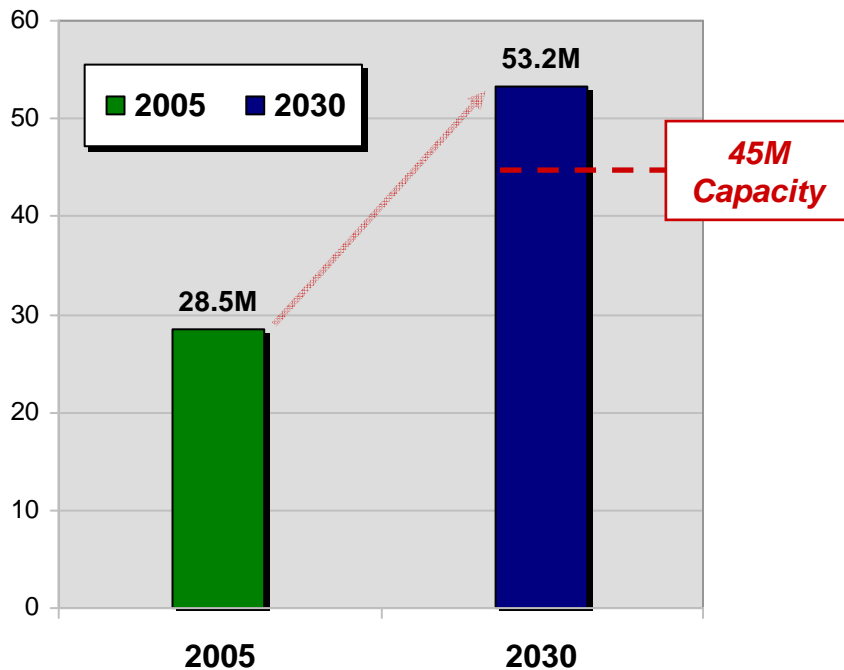


- Reflects connecting activity at SEA
- SEA is also capturing local passengers from other airports' catchment areas

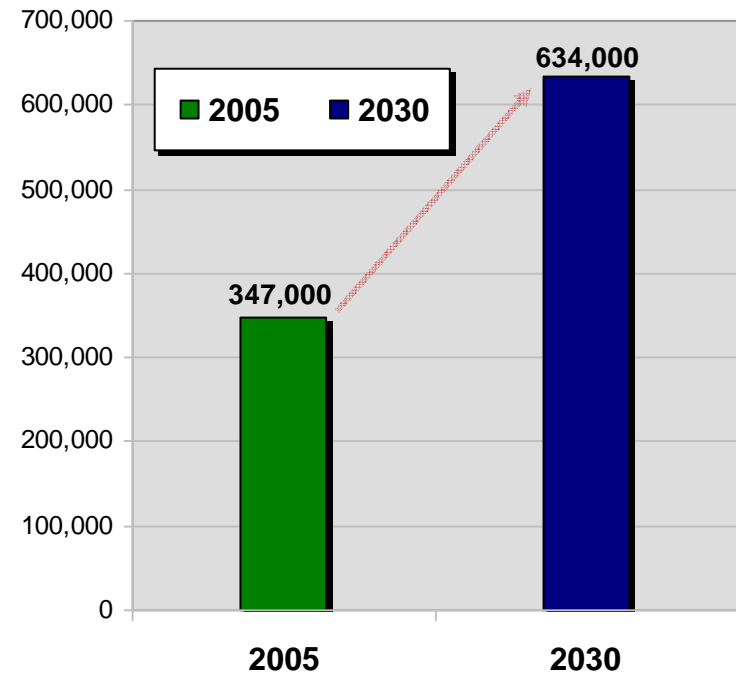
Note: Sea-Tac Primary Service Area Includes King, Snohomish, Pierce, Thurston, Mason and Jefferson Counties
Sources: FAA Terminal Area Forecasts, Official Airline Guide (August 2006), NPA Data Services

Sea-Tac is Projected To Reach Capacity in 2024 at 45 Million Passengers

Sea-Tac Passengers, Current and Forecast
In Millions, 2005 - 2030



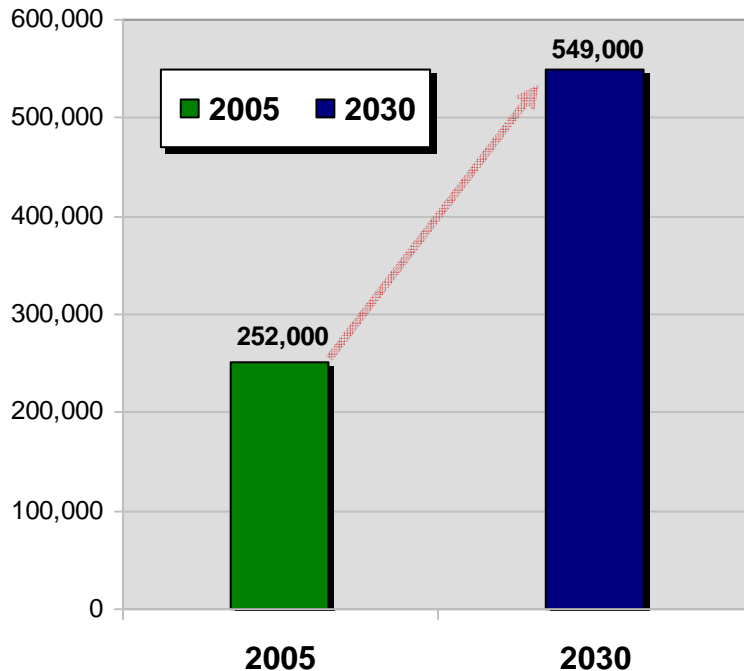
Sea-Tac A/C Operations, Current and Forecast
2005 - 2030



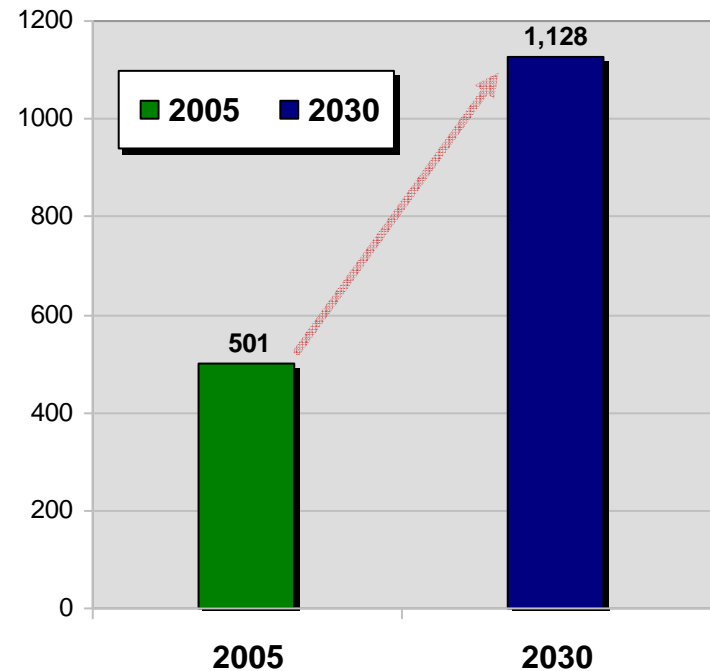
Airport activity currently exceeds 60% airfield capacity; operations are projected to be at 119% airfield capacity in 2030

Boeing Field is Also Forecast to Experience Airfield and Aircraft Storage Capacity Shortfalls by 2030

Boeing Field A/C Operations, Current & Forecast
2005 - 2030



Boeing Field Based A/C, Current & Forecast
2005 - 2030



Airport activity at Boeing Field currently exceeds 60% of airfield capacity and will be at 145% airfield capacity in 2030

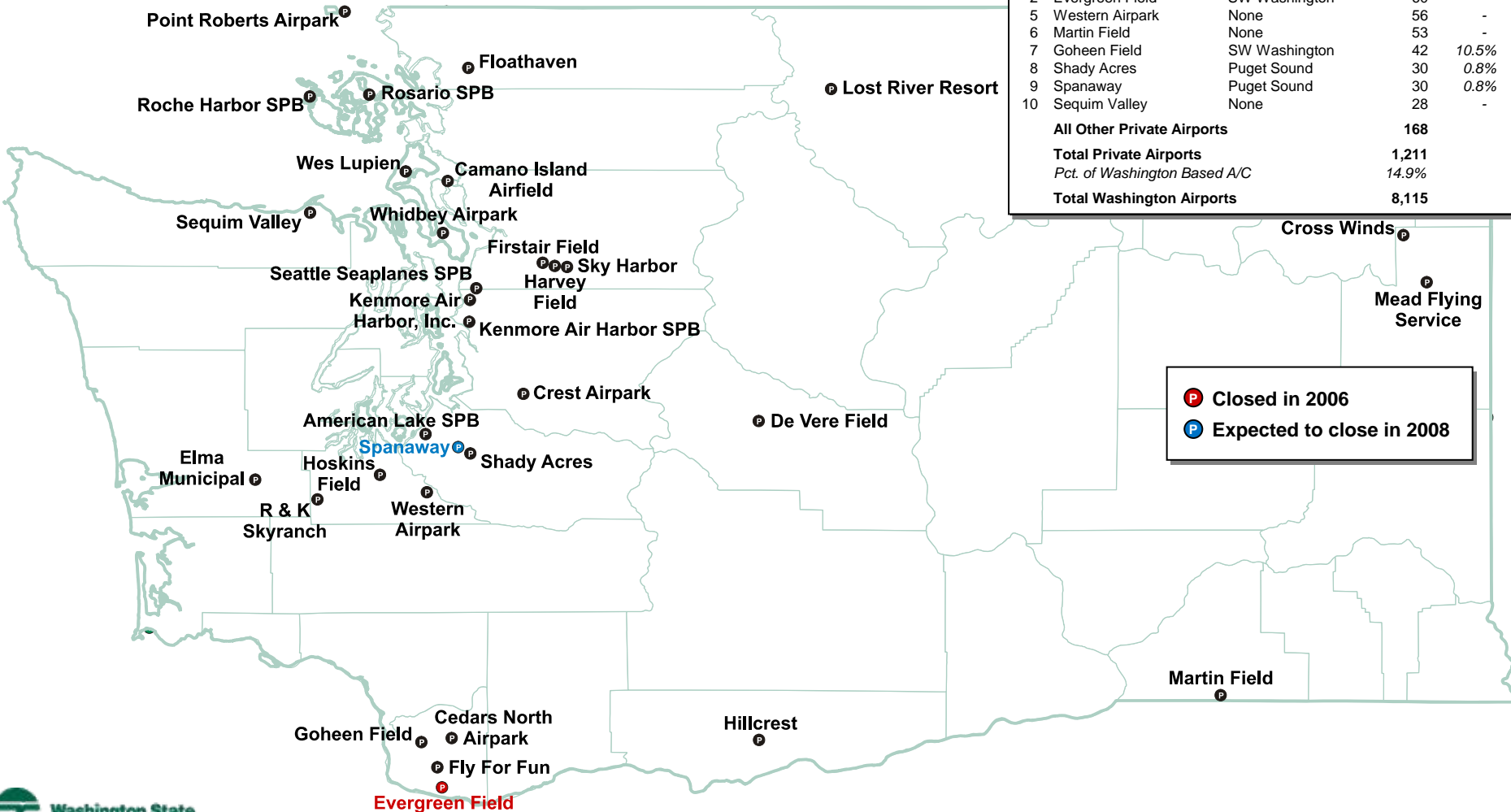
Boeing Field is also projected to have the greatest aircraft storage shortfall in the state

Nine of the Ten Washington Airports Forecast to Experience Airfield Capacity Constraints are Located in Puget Sound



Private Airports Make a Significant Contribution to the State System, Especially in the Puget Sound and Southwest Washington Special Emphasis Regions

Rank	Airport	Special Emphasis Region	2005 Based A/C	Pct. of SER
1	Harvey Field	Puget Sound	326	8.6%
2	Crest Airpark	Puget Sound	325	8.6%
3	Kenmore Air Harbor, Inc.	Puget Sound	80	2.1%
4	Firststair Field	Puget Sound	73	1.9%
2	Evergreen Field*	SW Washington	60	-
5	Western Airpark	None	56	-
6	Martin Field	None	53	-
7	Goheen Field	SW Washington	42	10.5%
8	Shady Acres	Puget Sound	30	0.8%
9	Spanaway	Puget Sound	30	0.8%
10	Sequim Valley	None	28	-
All Other Private Airports			168	
Total Private Airports			1,211	
<i>Pct. of Washington Based A/C</i>			<i>14.9%</i>	
Total Washington Airports			8,115	



P Closed in 2006
P Expected to close in 2008

Many of the Smaller Commercial Service Airports in Washington State Have Lost a Considerable Amount of Air Service in the Last 10-15 Years

Percentage Change in Weekly Scheduled Seats

August 1995 – August 2006

Airport	Percentage Change
Boeing Field	275%
Roche Harbor	114%
Rosario	114%
Westsound	114%
Sea-Tac	3%
Walla Walla	-11%
Spokane	-20%
Pasco	-23%
Oak Harbor	-25%
Moses Lake *	-35%
Wenatchee	-54%
Friday Harbor	-57%
Yakima	-57%
Pullman/Moscow	-61%
Seattle Lake Union SPB	-68%
Lopez Island	-71%
Kenmore	-80%
Port Angeles	-86%
Olympia	-89%
Center Island	-100%
Decatur Island	-100%
Blakely Island	-100%
Anacortes	-100%
Eastsound	-100%

- With the exception of Sea-Tac, Boeing Field and several San Juan Island airports, all other airports have lost scheduled capacity since 1995
- 6 airports have lost scheduled service entirely
- In many cases, competing carriers have exited the market completely, leaving a single carrier which has reduced flight frequency while substituting larger aircraft
- Proximity to larger surrounding airports with far greater service levels results in passenger “leakage”

Note: Moses Lake* lost all scheduled service in October 2006. Source: Official Airline Guide

Passenger Rail Improvements Will Not Provide Meaningful Capacity Relief to the Air Transportation System

- **Rail improvements are planned along the I-5 Corridor (Portland–Seattle–Vancouver)**
- **Capacity relief would be provided either by:**
 - Diverting passengers from air to rail in high density intercity markets; or
 - Causing passengers to choose alternate airports to begin air trips due to improved ground access
- **The Seattle-Portland and Seattle-Vancouver markets account for an extremely small percentage of total Sea-Tac passenger traffic**
- **Future rail access times to Portland and Vancouver airports will not be competitive with automobile drive times**

Discussion

- **What are the key issues and challenges?**

Action Items

- **Elect Vice Chair**
- **Approve Charter**
- **Approve public involvement plan**

For discussion:

- **Draft Purpose and Need**

Public Involvement Plan

Public Involvement Structured to Support Key Council Actions

■ Public information program objectives

- Targeted information to assure that stakeholders' information needs are met
- Web site will provide on-going and current information on Council deliberations and technical studies
- Public information tools to include written and electronic information and media outreach

Public Involvement Structured to Support Key Council Actions

Other Public Outreach Tools

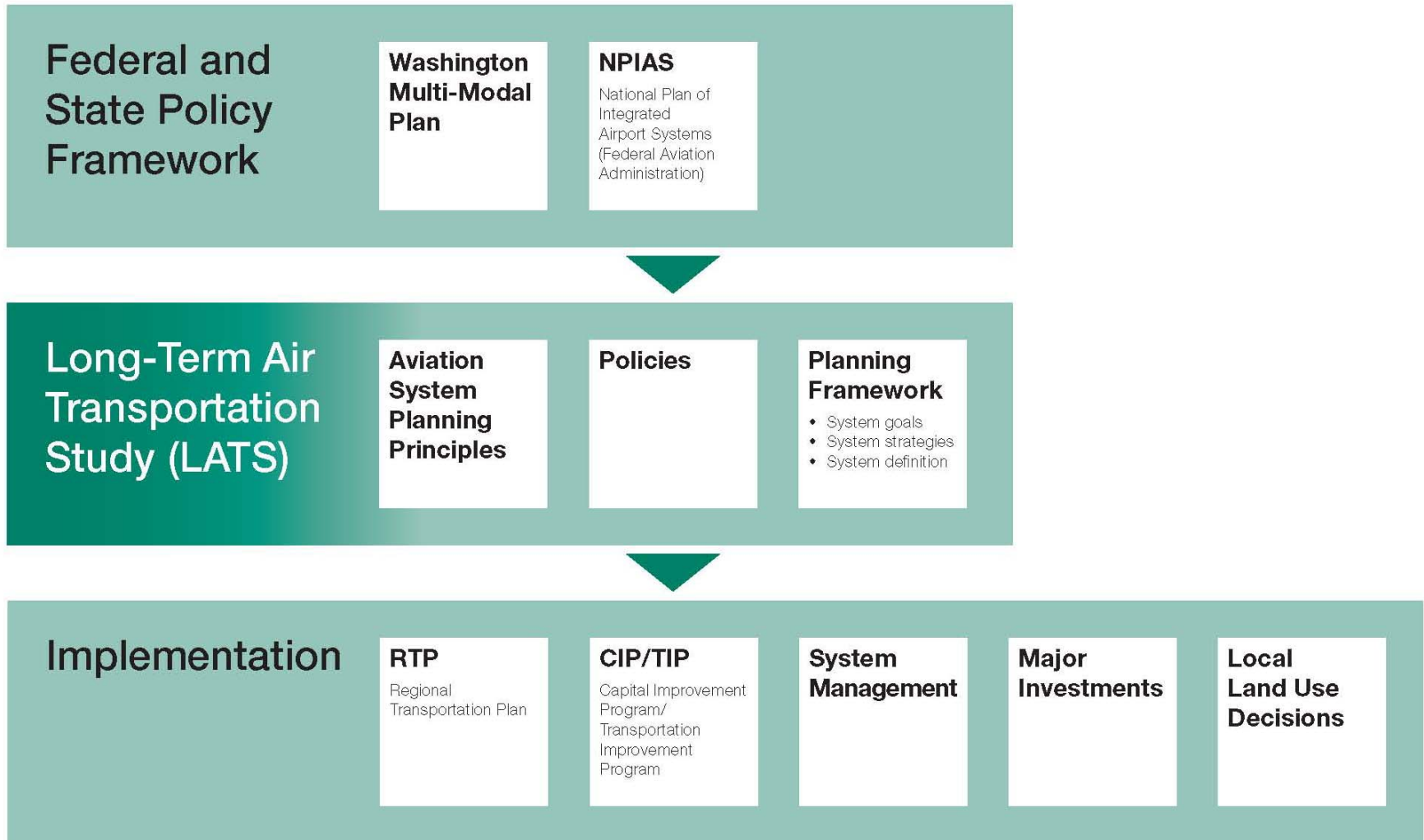
- **Written and oral comments**
- **Council meetings open to public**
- **Regional meetings**
- **Speakers bureau**
- **Briefings**
- **Innovative tools**
 - Electronic town meetings
 - Statewide online random sample survey

Public Involvement Plan

■ Actions:

- Review of public comment
- Review recommended changes to plan
- Approve public involvement plan

Aviation System Planning Hierarchy



Long-term Air Transportation Study (LATS) Washington State Aviation Planning Council

DRAFT PURPOSE AND NEED STATEMENT

Maintaining a healthy aviation system is in the interests of the nation and the citizens of Washington State.

At the national level, Washington's aviation system is an international link for passengers, goods, and services, and is an important component of our national defense capability. Washington State's aviation system is an essential function of our overall transportation system, because it

- moves people and goods
- promotes business and commerce
- promotes quality of life
- provides access for critical emergency and disaster management services that other transportation modes cannot accommodate.

That system ranges from large airports that serve major population centers to small community airports that are a critical link to sparsely populated expanses. Although Washington's airports are diverse, with different kinds of needs and roles, they need to function together as a healthy, balanced system.

Washington State Aviation Planning Council was established by the Legislature and appointed by the Governor to develop recommendations to the Governor and Legislature for capital investment strategies and policies needed to maintain a healthy aviation system.

The Council's recommendations will be based upon Phases I and II findings of the Long-term Air Transportation study (LATS) and public input. As directed by the Legislature, technical and administrative support will be provided by the Washington State Department of Transportation (WSDOT) Aviation Division and a technical consultant team.

Work Program

Work Program Principles

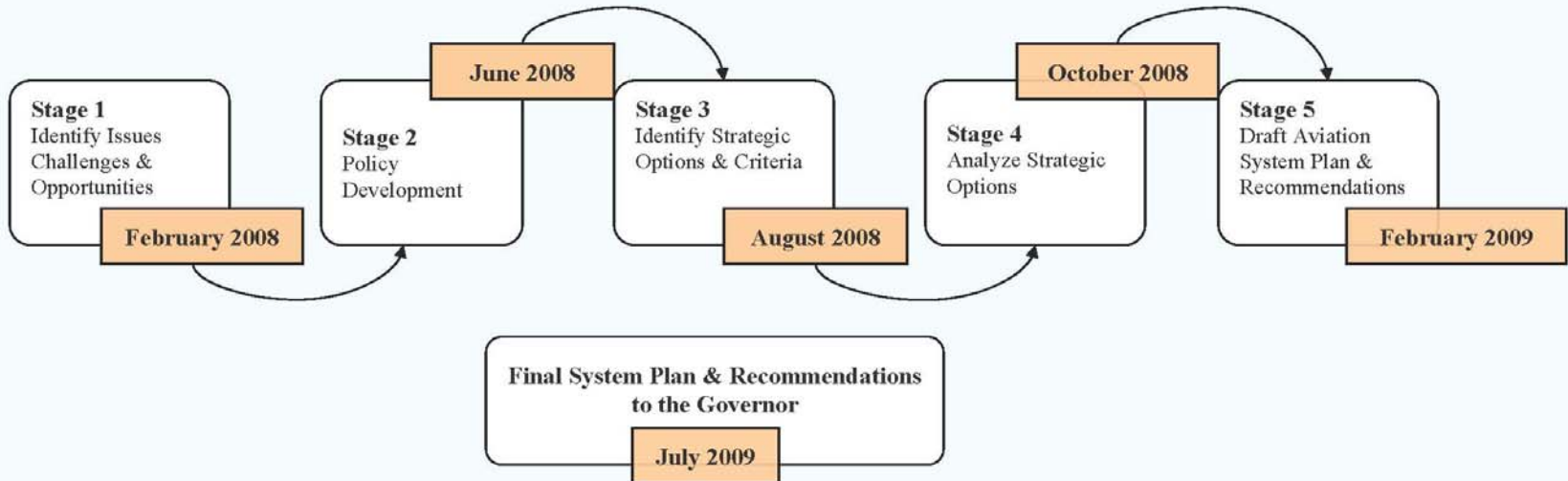
- **Objectives of ESSB 5121**
- **Meet State and Federal Guidance**
- **Statewide Emphasis**
- **10 Council meetings and workshops scheduled**
 - Held at locations throughout the state to encourage statewide participation in the Study
 - Meetings are proposed to occur within Seattle, Spokane and Southwest Washington
- **Public participation efforts designed to gather statewide input**
 - Regional meetings will be occur in eastern and western Washington in differing geographic regions
- **Recommendation forwarded to the Governor by July 1, 2009**

Work Program Overview

← Project Timeline →

2008												2009					
Stage I				Stage 2			Stage 3		Stage 4			Stage 5					
Month	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Activity	(1) Meeting	(2) Workshop	(3) Workshop	(4) Workshop	(5) Workshop	*Regional Meetings	(6) Meeting	(7) Workshop	*Regional Meeting	(8) Meeting			(9) Workshop	*Online Survey		(10) Meeting	
Location	Seattle	Seattle	Seattle	Seattle	Spokane	Everett/Wenatchee	Vancouver	Seattle	Vancouver/TriCities	Spokane			TriCities	Statewide		Seattle	

Public Outreach and Participation Throughout the Project
 (Media Releases, Web Page, Regional Meetings, Stakeholder Briefings, Electronic Town Hall, Online Survey, E-News Briefings, etc...)



LATS Phase III – Technical Team Tasks

- **Identify a series of key issues and challenges facing the State**
- **Work with the Council to evaluate alternative strategies that deal with long-term planning challenges:**
 - Define alternative strategies
 - Establish decision-making criteria
 - Analyze alternatives based on criteria
- **Assess viability of utilizing military airfields as civil airports**
- **Present Phase I and Phase II findings to Council, provide Council with technical information, and respond to Council directives**
- **Communicate progress of the study to the public and elicit public input on key issues**
- **Develop prioritization system to best direct state funds to projects that produce the greatest benefits to the system**
- **Develop financial plan that considers creative sources of funding state aviation needs**
- **Prepare an Aviation System Plan document**

Next Steps

- **Council Meetings**

- **Workshop #2: Access, Preservation and Safety**

- March 6, 2008 – Seattle**

- **Workshop #3: General Aviation and Commercial Airports**

- April 3, 2008 – Seattle**

- **Review Work Plan**