Could the Puget Sound commercial airports operate as a single airport system?

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WORK GROUP

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Defining the problem: airport capacity vs demand

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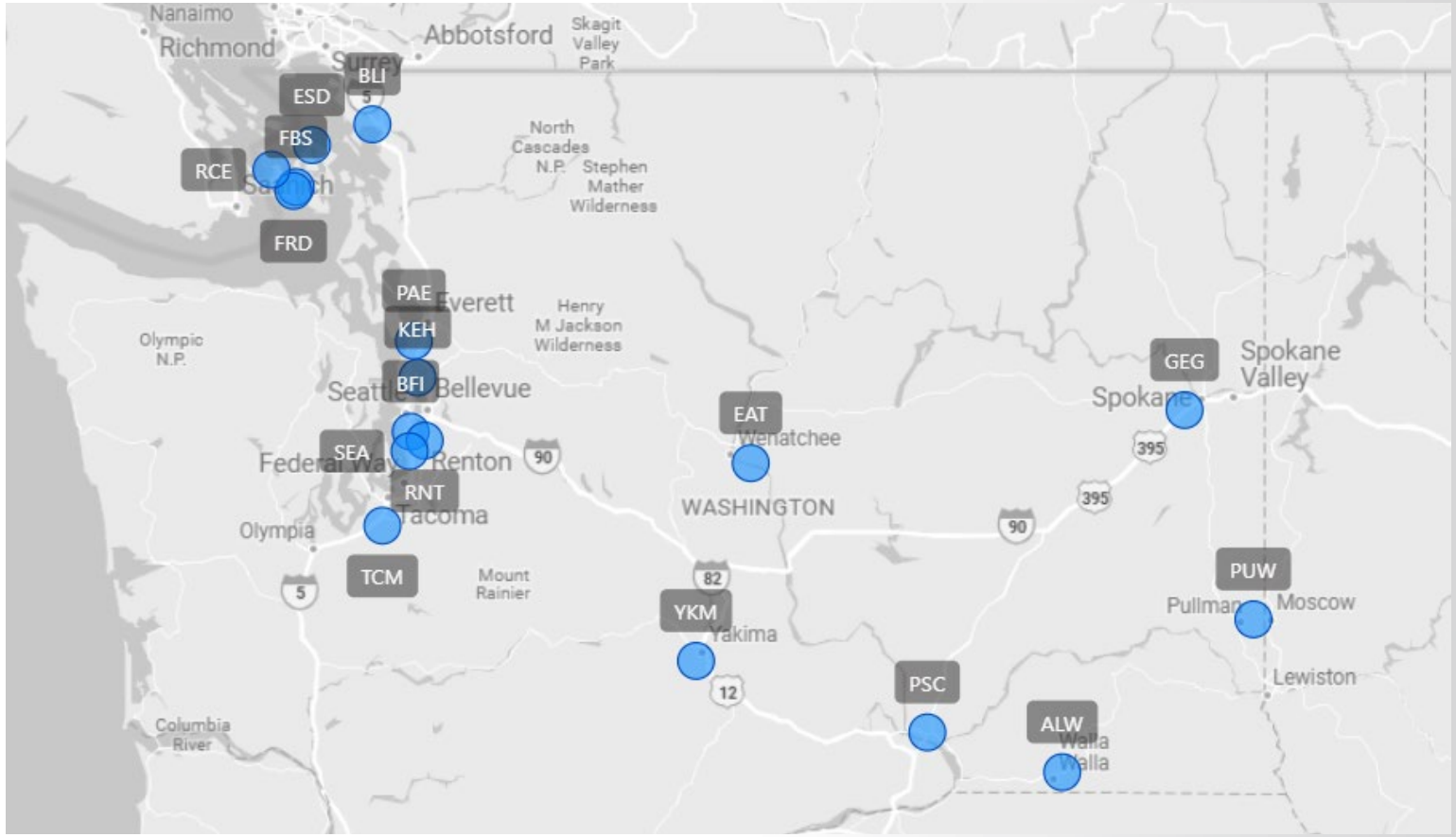
Washington's 17 busiest commercial airports

Washington State – Map of In Scope Airports



IATA Code	City	2025 epax (m)
SEA	**Seattle-Tacoma International**	**26.317**
GEG	Spokane International	2.114
PSC	Tri-Cities	0.528
PAE	**Seattle Paine Field International**	**0.306**
BLI	Bellingham International	0.226
PUW	Pullman/Moscow Regional	0.075
EAT	Pangborn Memorial	0.043
YKM	Yakima Air Trml/McAllister Field	0.046
ALW	Walla Walla Regional	0.039
BFI	**Boeing Field/King County**	**0.030**
FRD	Friday Harbor Airport	0.011
TCM	McChord Field	0.000
ESD	Orcas Island	0.009
KEH	Kenmore Air Harbor	0.007
FBS	Friday Harbor Seaplane Base	0.006
RCE	Roche Harbor	0.004
RNT	Renton Municipal	0.001
Total		29.762

Source: BTS T100, SEA Statistics, Steer

steer

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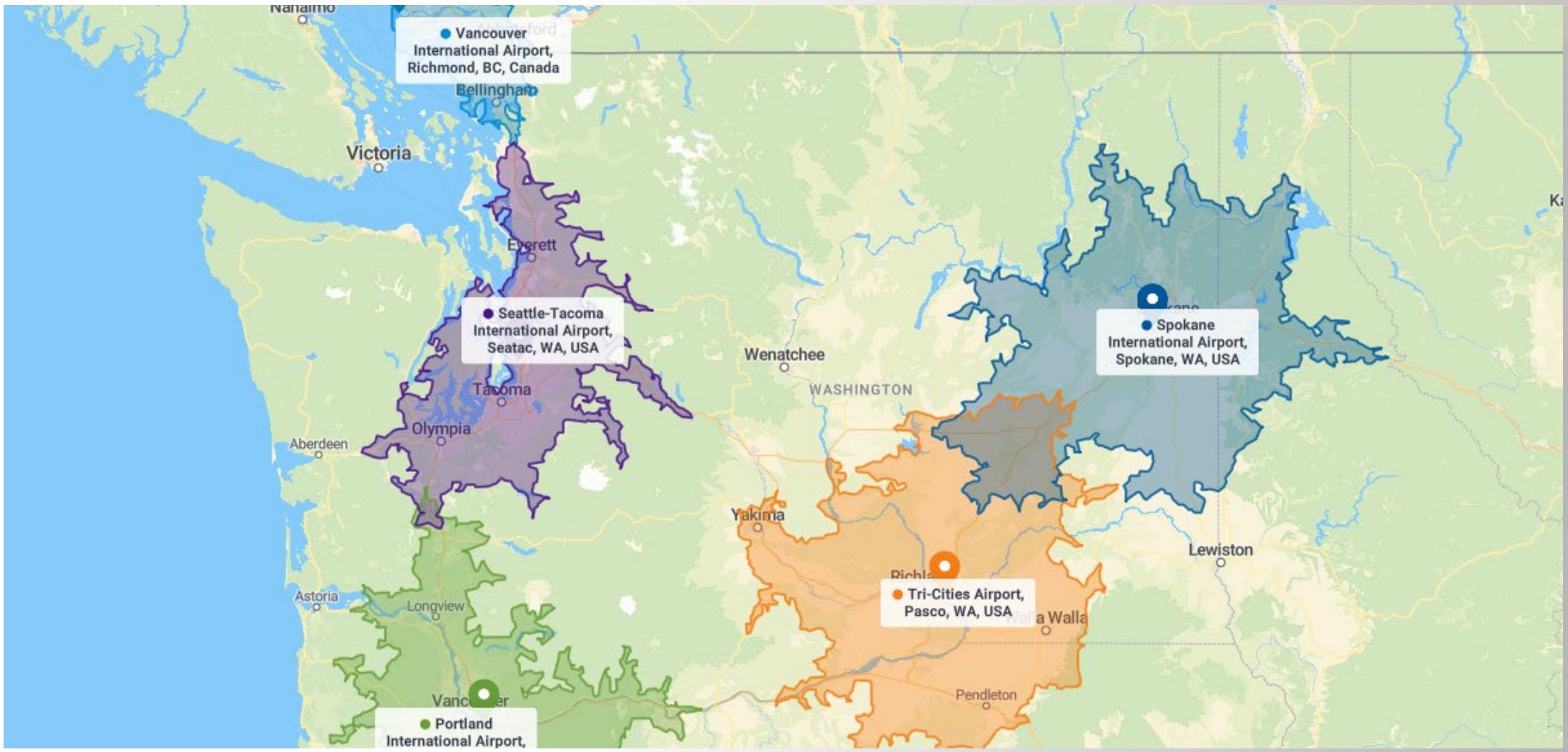
Catchment areas: Very little overlap with current travel times



Source: Steer analysis, BTS

steer

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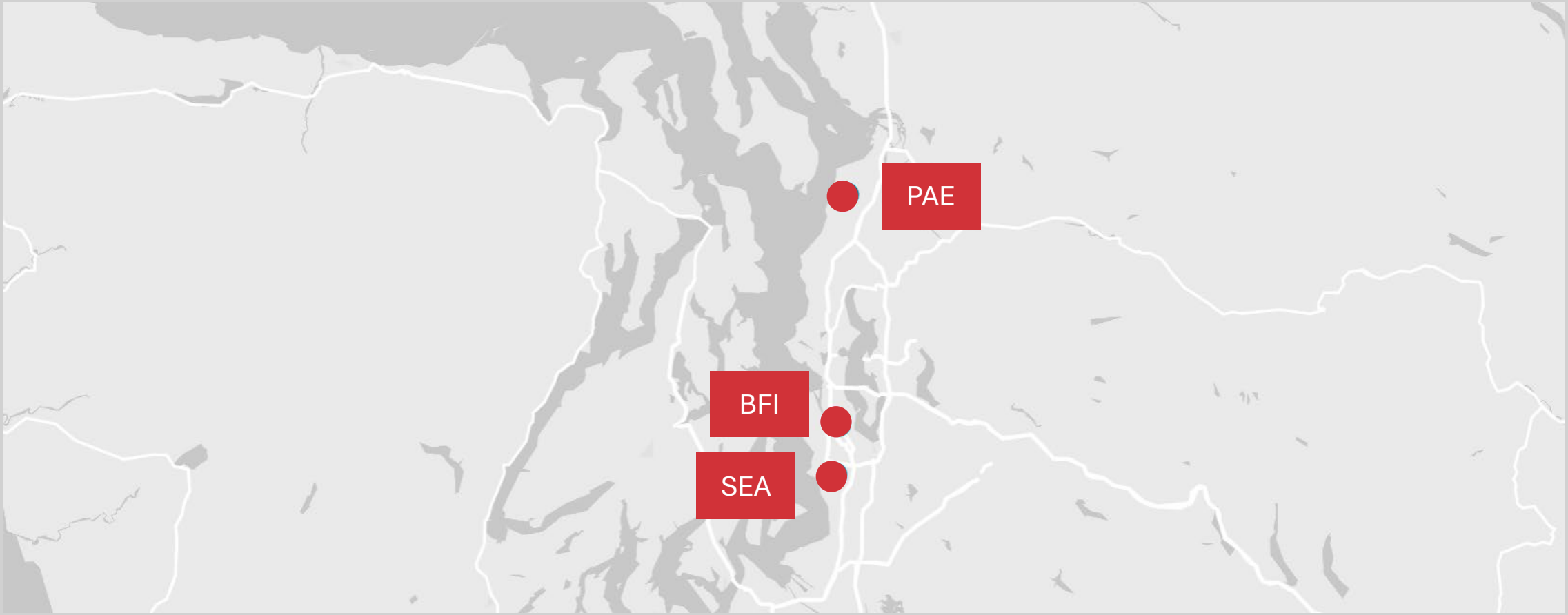
Puget Sound commercial service airports



Source: Steer analysis, BTS

Airport capacity for growth – the problem

Airport	Commercial passengers	Commercial cargo
SEA		
PAE		
BFI		

Cooperation

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Can airports formally cooperate?

- Airport proprietors are required to make their airports available for public use on reasonable terms and without unjust discrimination across all types, kinds and classes of aeronautical activities.
- A sponsor may not deny an air carrier access solely based on the nonavailability of existing facilities. A sponsor must make arrangements for accommodations if reasonably possible.
- Airport sponsors have considerable flexibility to cooperate informally, but more limited authority to formally coordinate finances, operations and service.
- Antitrust issues exist but are not insurmountable – especially with state legislation

Is formal cooperation necessary or desirable?

The law – restrictions on airport traffic

- Airport proprietors generally cannot impose restrictions on the aircraft that can use their airport except as needed for safety reasons.
- Restrictions generally require FAA consent or statutory or regulatory mandate. Few exceptions prove the rule -
  - New York LaGuardia
  - Washington Reagan National
  - Chicago O'Hare

Are restrictions necessary for optimal traffic allocation? What about incentives?

The law – use of airport funds

- Airport proprietors can only use their revenue for:
  - the capital and operating costs of the airport;
  - **the local airport system;**
  - other local facilities which are owned or operated by the owner or operator of the airport, and which are directly and substantially related to the actual air transportation of passengers or property;
  - noise mitigation purposes on or off the airport

Addressing airport capacity - tools

- Permissible joint actions by airport proprietors
  - Incentives for new service
  - Peak hour pricing during congested times
  - Pricing differentials generally
  - Penalties disguised as incentives
- Impermissible joint actions by airport proprietors
  - Restrictions on access (generally)
  - Prohibition on certain types of operations (e.g., general aviation; small aircraft; cargo)

What is a local airport system?

- No definitive statutory, regulatory, or universally accepted, definition.
- Can include
  - Airports operated by the same airport proprietor
  - Airports serving the same geographic area
  - Airports that are complementary in serving regional traffic
  - Reliever airports
- Federal policy encourages local airport system planning and allows (limited) airport system formal cooperation

How to create an airport system

- Designate a local airport system
- Define scope of cooperation and coordination
- Establish decision making protocol
- Define limits on cooperation consistent with federal requirements
- Ensure work within limits set by federal antitrust laws

What regional political imperatives should inform any airport system?

Examples of formal and informal airport systems

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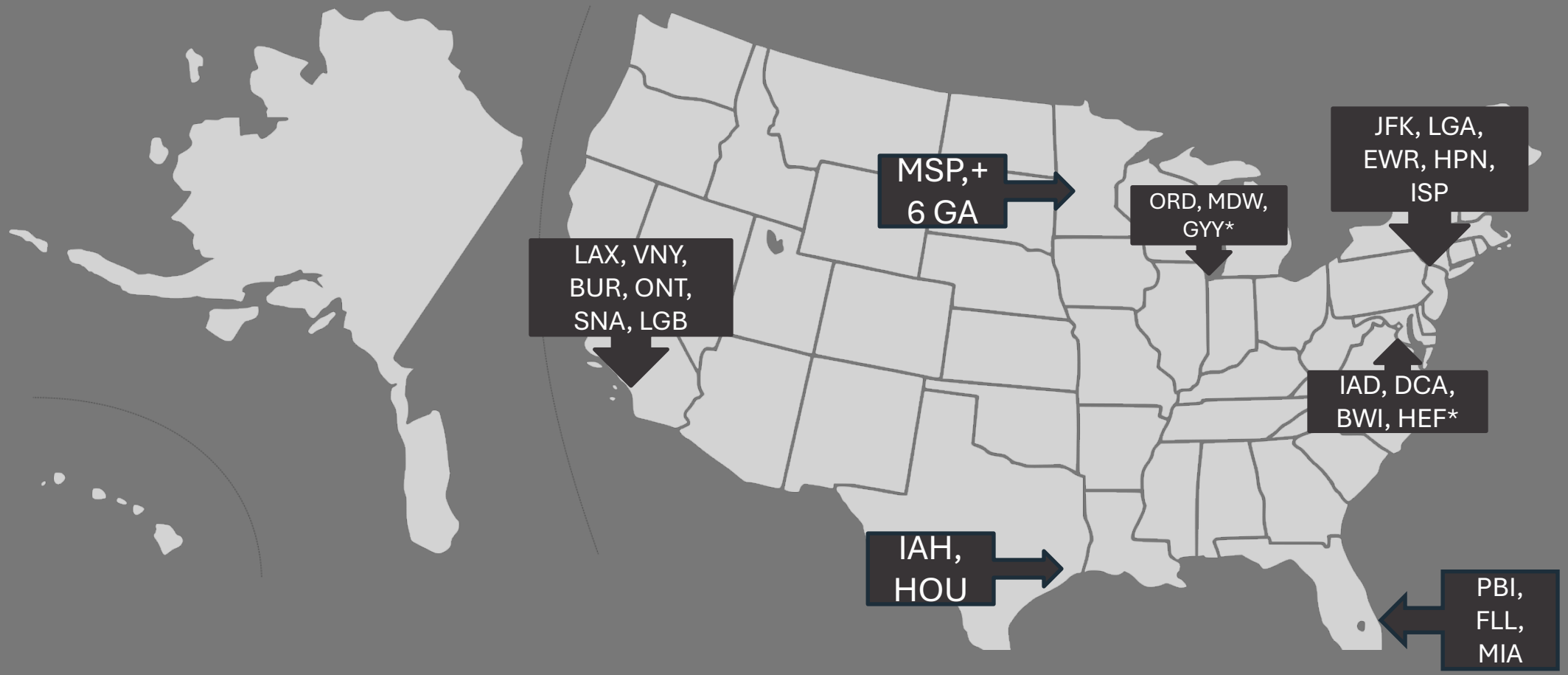
Different types of local airport systems



Airport system models

- Single ownership (Minneapolis)
- Informal cooperation (New England)
- Informal competition (S. Florida)
- Formal competition (Dallas, DMV (partial))
- Complete independence (Los Angeles)

Solutions

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Tools to create an airport system

- Statutory authorization or direction
- Formal intergovernmental agreement
- Informal memorandum of cooperation
- Creation of single consolidated agency

What would a Puget Sound airport system look like?

Options to stimulate brainstorming

- Peak-period pricing program that charges users more to land during the busiest times of day at congested airport; promotional fee waivers at other airports.
- Structure rates at BFI, PAE and SEA so that aeronautical users are incentivized to spread traffic among airports.
- Use airline leases to incentivize use of alternative airports.
- Cooperative planning for facilities at the three airports so that facilities will be complementary, not duplicative (e.g., long-haul, hubs, O&D regional, cargo, general aviation)

Discussion

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General Aviation Airports

An opportunity to support the regions commercial airport capacity crunch?

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Draft – Working Document

2024 GA Operations Profile

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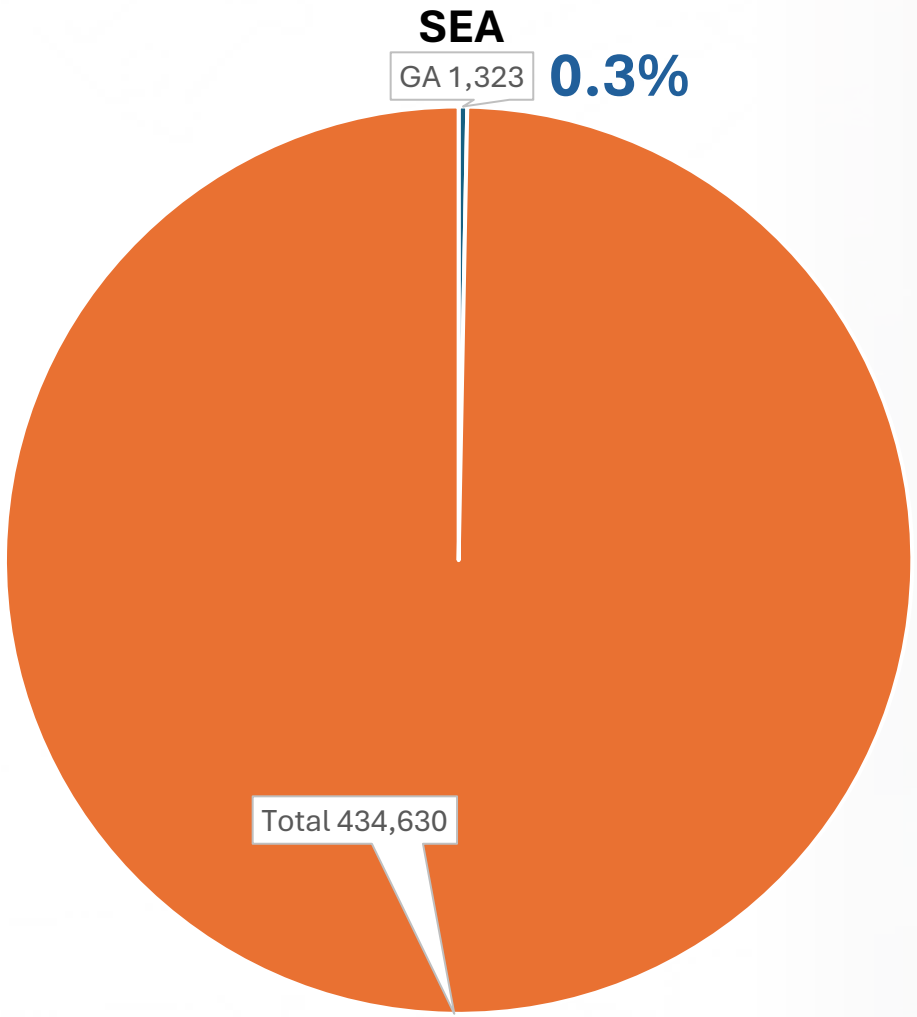

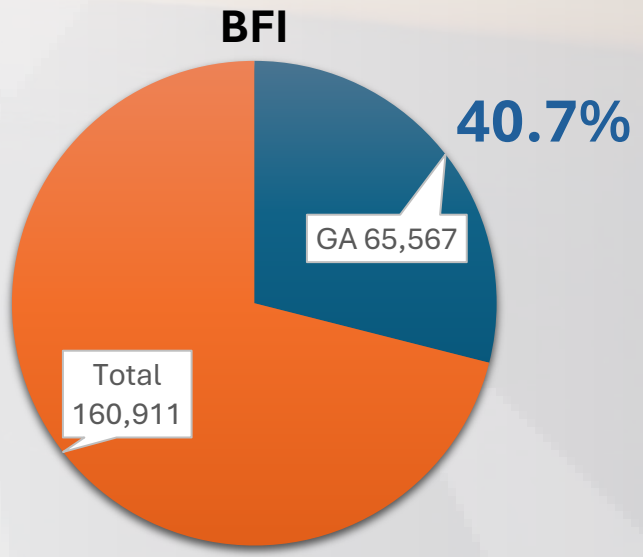

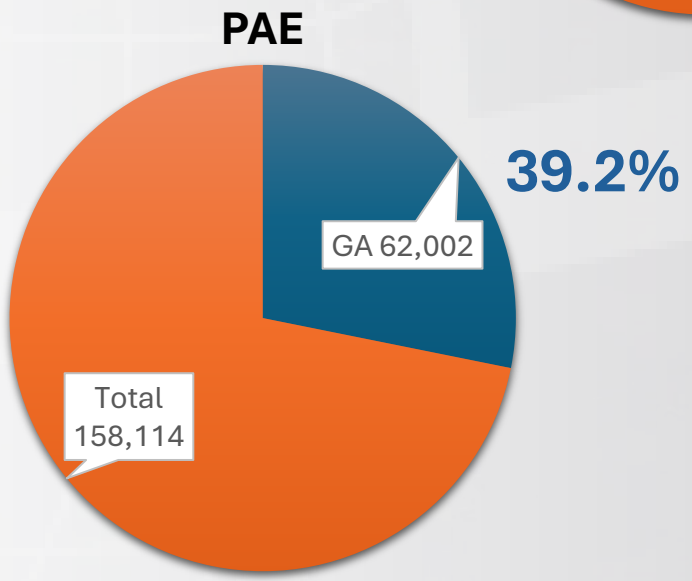

WA Airport System at a Glance

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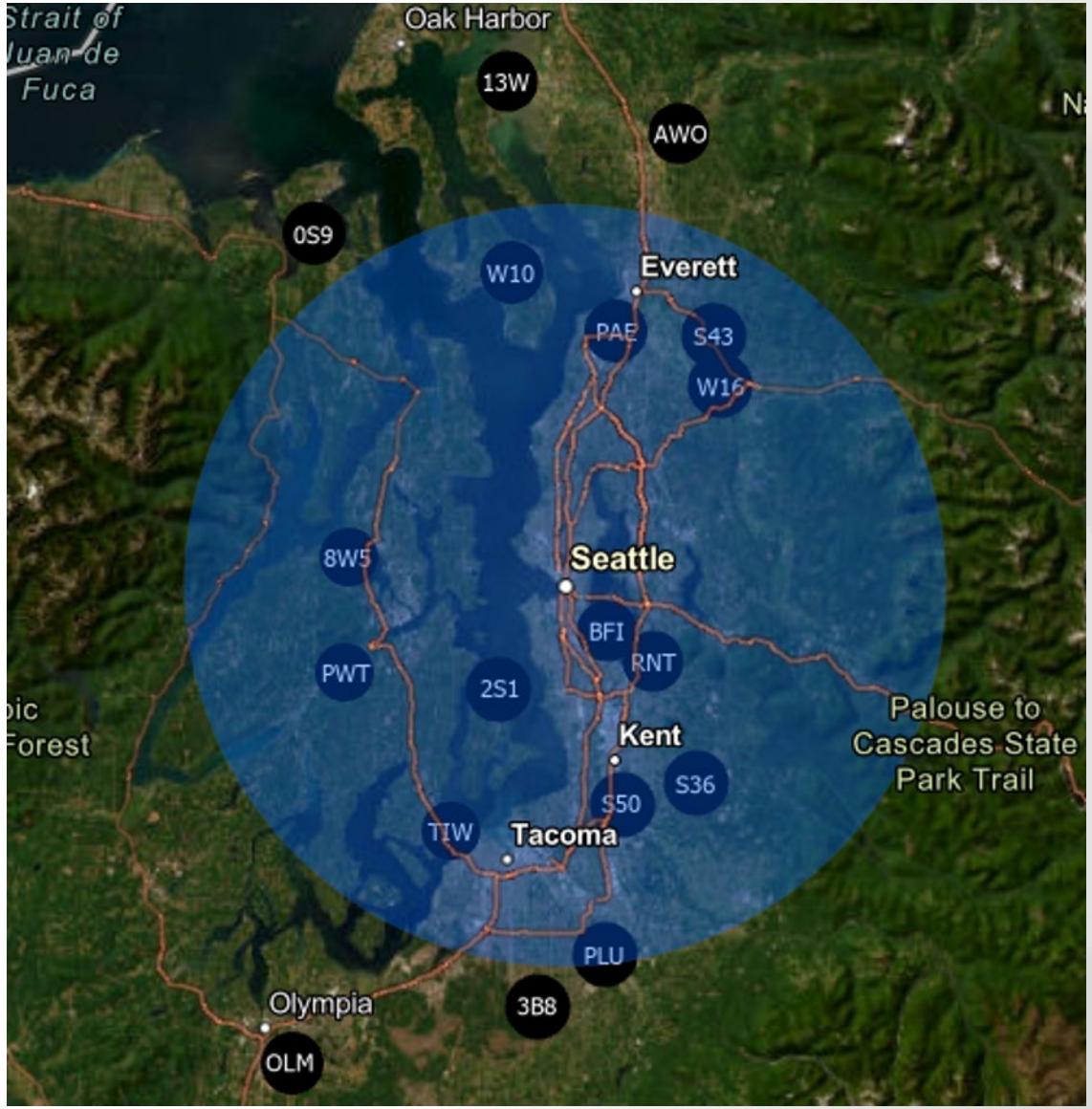
- 49 airports identified within approximately 20-miles of Seattle
  - 17 public airports; others are private airports
  - 4 towered airports
  - Wide range of facilities, form small turf airfields to 10,000+ foot runways

- Is there opportunity for them to play a role in airport capacity solutions?
  - Some of the bigger GA airports more comparable to BFI and PAE
  - Multiple GA airports identify future hangar, tie-down, apron, and terminal development
  - The region has a diverse airport network serving commercial, business, general aviation, training, and recreational users
    - How do we maximize and optimize the right role for all airports?

A Narrowed View



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Upon Closer Review

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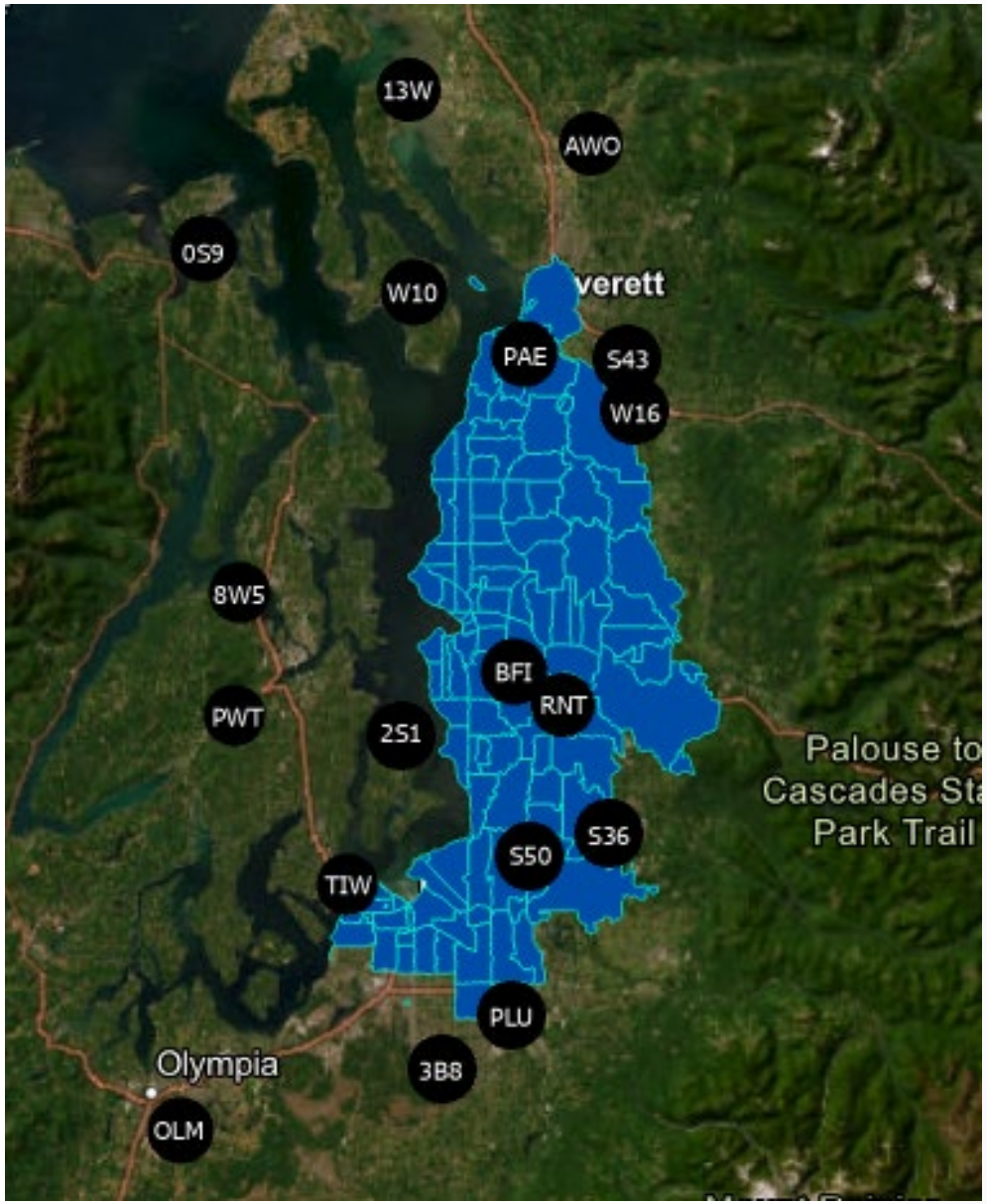
- The airports range from small community airfields with runways under 2,000 feet to Boeing Field, which has a 10,007-foot primary runway

- Hangar and aircraft parking demand is evident across several airports, with reported waitlists ranging from approximately two to 10 years at airports including Renton, Paine Field, Bremerton, Tacoma Narrows, and Pierce County/Thun Field

- Several airports have identified future development opportunities, particularly additional hangars, tie-downs, apron improvements, and terminal or support facilities



- Number of pilots loosely tied to based aircraft demand
- 2,644 pilots within highlighted zip codes
- Ability to access other airports besides SEA; PAE; and BFI
- Highlight Airports:
  - Auburn Municipal (S50)
  - Pierce County / Thun Field (PLU)
  - Arlington Municipal (AWO)

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Auburn Municipal Airport (S50)

- Runway 17/35 – Existing 3,841’ x 75’ (Cessna 340A); Future 4,118’ x 75’ (Same/Pilatus PC-12 Reserve)
- 238 Based Aircraft and 2024 TAF shows 140,000 operations
- ALP shows future aircraft parking development (both hangars and tie-downs)
- Has Flight Service, Maintenance, Avionics, Sales, Wash Rack, Young Eagles, and proximity to rental car facilities

Pierce County / Thun Field (PLU)

- Runway 17/35 – Existing 3,651’ x 60’ (Cessna Conquest); Future 4,000’ x 75’ (King Air 200/300); Ultimate 4,200’ x 75’ (Cessna 500 Series)
- 179 Based Aircraft and 2024 TAF shows 107,000 operations
- ALP shows future aircraft parking development (hangars and a new apron)
- Has Civil Air Patrol, SASOs, FBOs, Flight Training Offices, and Restaurant

Arlington Municipal Airport (AWO)

- Runway 11/29 – Existing 3,498’ x 75’ (Cessna 172)
- Runway 16/34 – Existing 5,332’ x 100’ (Beech King Air B-200); Future 6,000’ x 100’ (AI-1125 Westwind, Beech Super King Air)
- 442 Based Aircraft and 2024 TAF shows 67,080 operations
- ALP shows future aircraft parking development (Executive/Corporate Hangars and T-hangars)
- Has Aeronautical Testing Services, Aviation Inspection and Repair, Engine Services, Flying Clubs, Flight Training, and Restaurant

Discussion

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Workplan 26-27

Work Group Meeting | Committee Discussion

September 3, 2026 | Virtual

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Draft – Working Document

Committee Discussion

- Resources for Committees
- Ideally 5 to 7 CAWG members
- Allow focus on subject matter/topic
- Meet between official meetings
  - Anticipate at 2 hours or less
- Committee Lead to report out at full CAWG Meetings when appropriate

- Committees (potential topics):
  - Public Governance and Engagement
    - Annual Report
    - Airport Systems
  - Infrastructure and Environmental
    - Multi-modal considerations
    - Future considerations (SAF, AAM, Hydrogen, Etc.)
  - Policy, Regulations and Standards
    - Demand profiles
    - Federal constraints

- Discussion

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Discussion

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