

Sound Transit Citizen Oversight Panel

December 2, 2020

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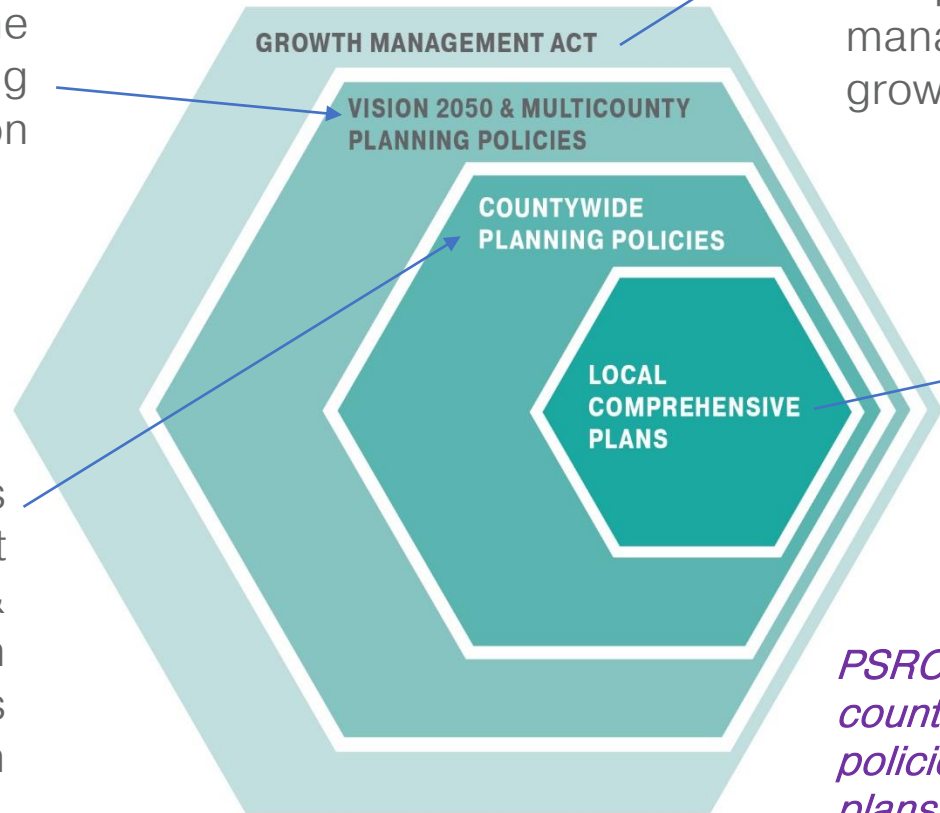


Puget Sound Regional Council

Planning in Washington State

Adopted in 1990; requires fast-growing cities and counties to develop a comprehensive plan to manage their population growth

PSRC as the regional planning organization



Local jurisdictions prepare plans that must be consistent with multicounty & countywide policies

Counties and cities work together to set population & employment growth targets and policies to guide growth

PSRC certifies countywide planning policies and local plans



REGIONAL POLICY DIRECTION

VISION 2050

—Multicounty Planning Policies—
—Regional Growth Strategy—

DETAILED FUNCTIONAL IMPLEMENTATION PLANS

Regional Transportation Plan

—Metropolitan Transportation Plan—

Regional Economic Strategy

—Comprehensive Economic Development Strategy—



Multimodal Highway Expansions



Light Rail and Transit Expansion

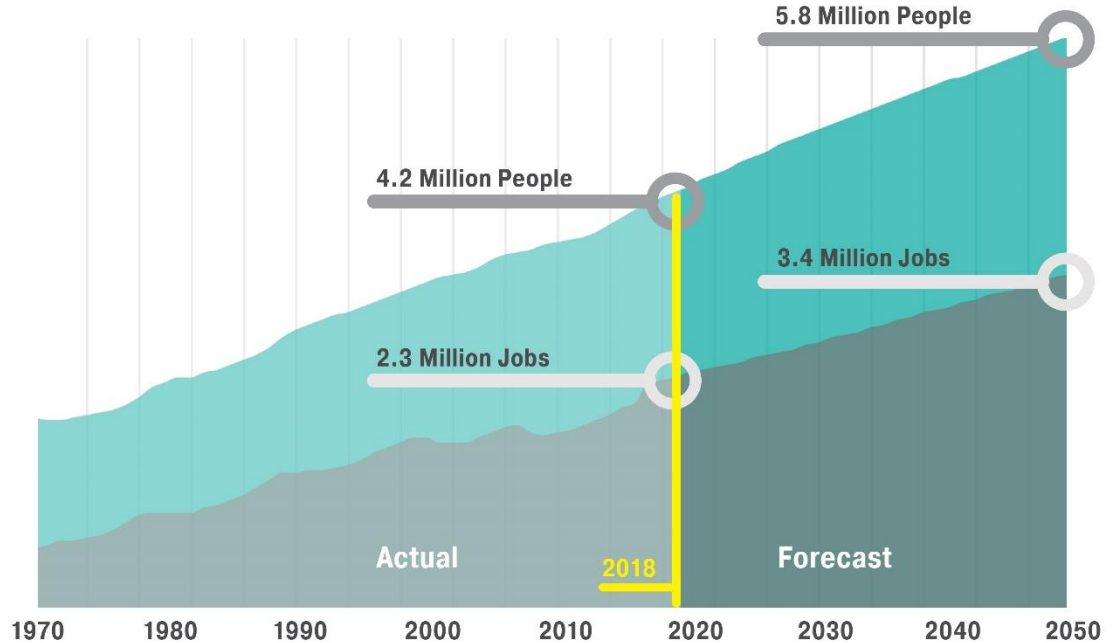


Tech Building Boom



Regional 2050 Growth Forecast

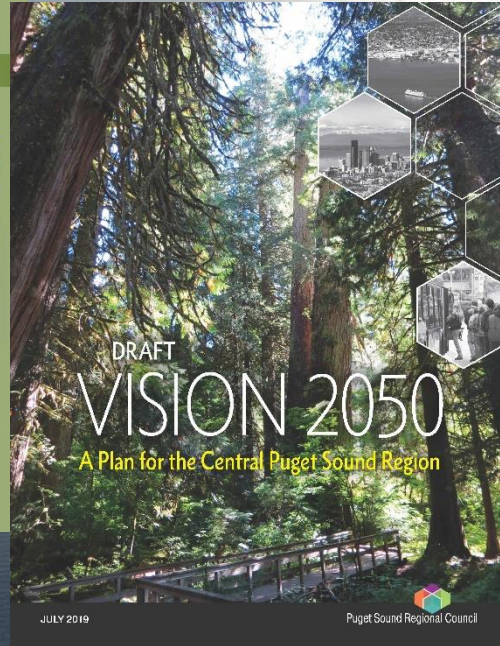
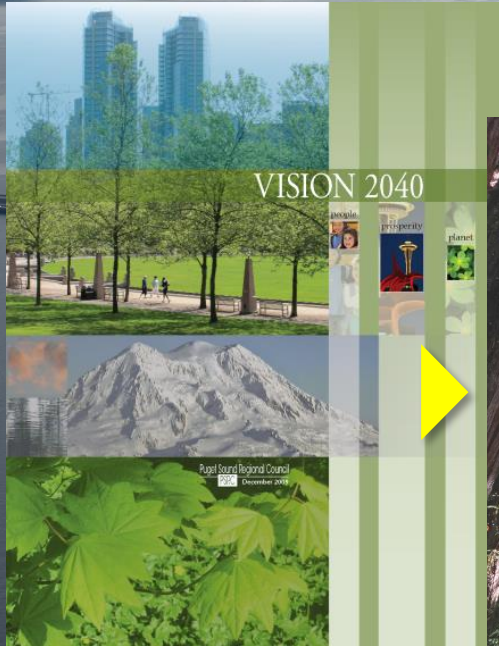
- The region is projected to grow by about **1.6 million people** by 2050
- The region is projected to add about **1.1 million jobs** by 2050



VISION 2040



VISION 2050



- A strong economy and a healthy environment
- Preserve waters, farms, recreation and resource lands
- Urban Growth Area and centers strategy
- Local actions to achieve regional VISION



Data and Research

Public opinion survey

Alternatives modelling

Research topics:

- Annexation
- Equity
- Health
- Housing
- Regional Growth Strategy
- Climate Change
- Technology
- Freight
- Displacement Risk Mapping
- Opportunity Mapping



Leveraging the Region's Investments

Nearly 30 new miles of light rail in the next 4.5 years

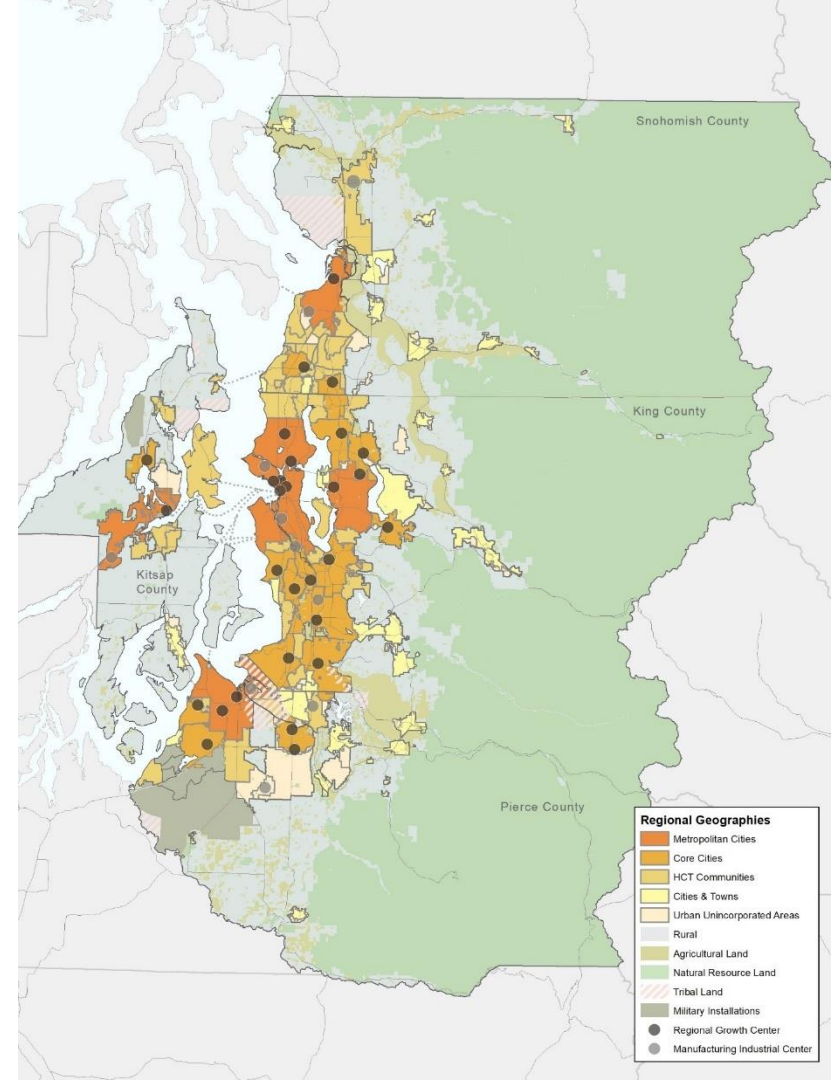
- **2021** - Northgate, Roosevelt and the U District.
- **2023** - the Blue Line to the Redmond Technology Center, 10 new stations
- **2024** another 9 stations: Federal Way, Shoreline, Redmond, Mountlake Terrace, Lynnwood, and Kent/Des Moines

Plus regional BRT systems, freeway expansions, fast ferries & 60+ more miles of light rail



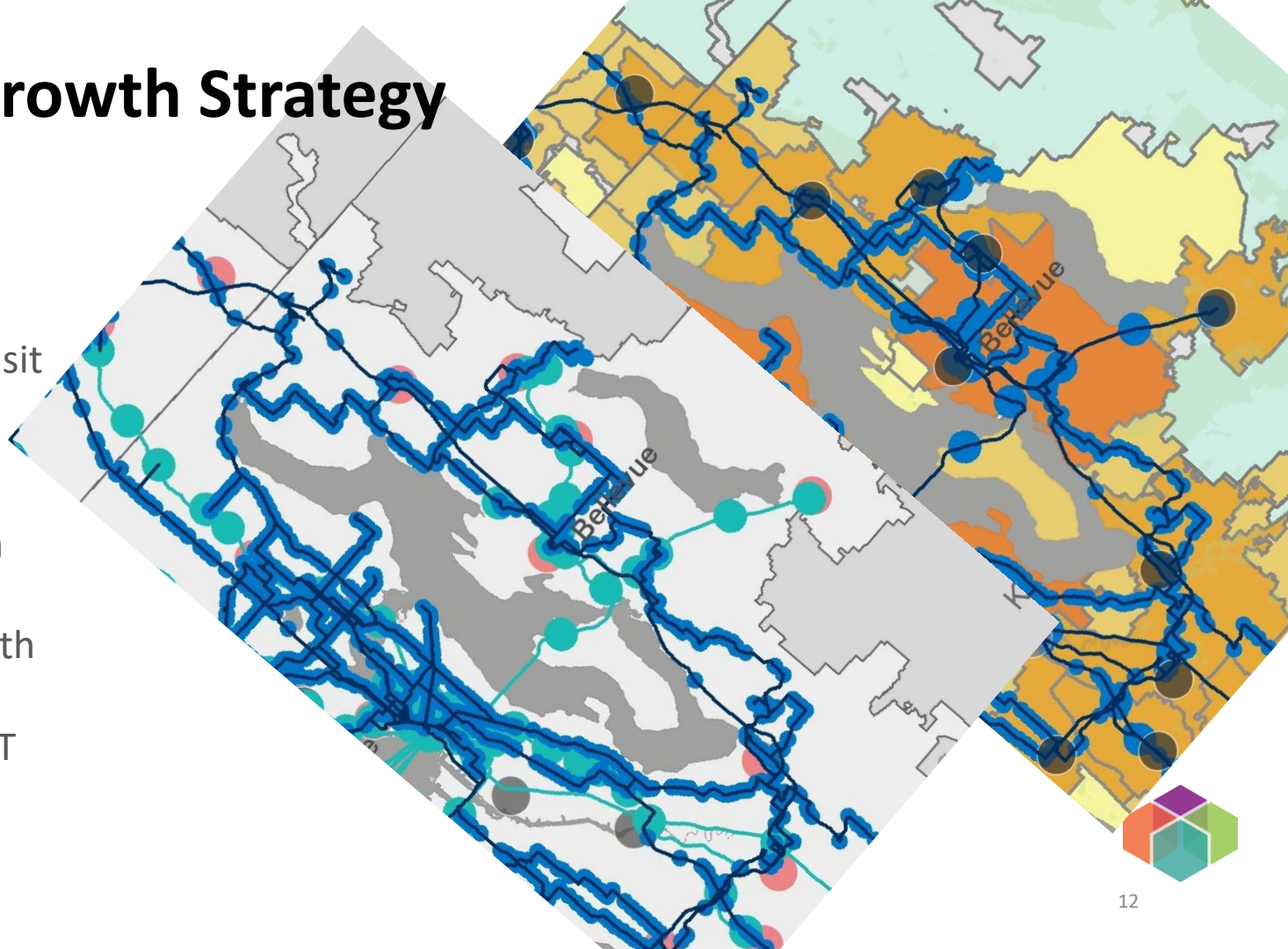
Regional Growth Strategy

- Most growth in Metro, Core, and High Capacity Transit Communities
- **65%** of region's population growth and **75%** of employment growth in regional growth centers & near HCT
- Lower growth allocations in urban unincorporated and rural compared with long-term trends
- Better jobs-housing balance by shifting employment allocation from King County



Regional Growth Strategy

- Most growth in Metro, Core, and High Capacity Transit Communities
- **65%** of region's population growth and **75%** of employment growth in regional growth centers & near HCT



Performance of VISION 2050

Compared to Stay the Course



Land Development



Less land converted - Amount of land converted to new development is substantially less than other alternatives



Transit ridership



Greater transit ridership - Transit ridership increases compared to alternatives



Greenhouse gas emissions



Greenhouse gas emissions reduced – Emissions, compared to 2014 baseline, decrease more than alternatives



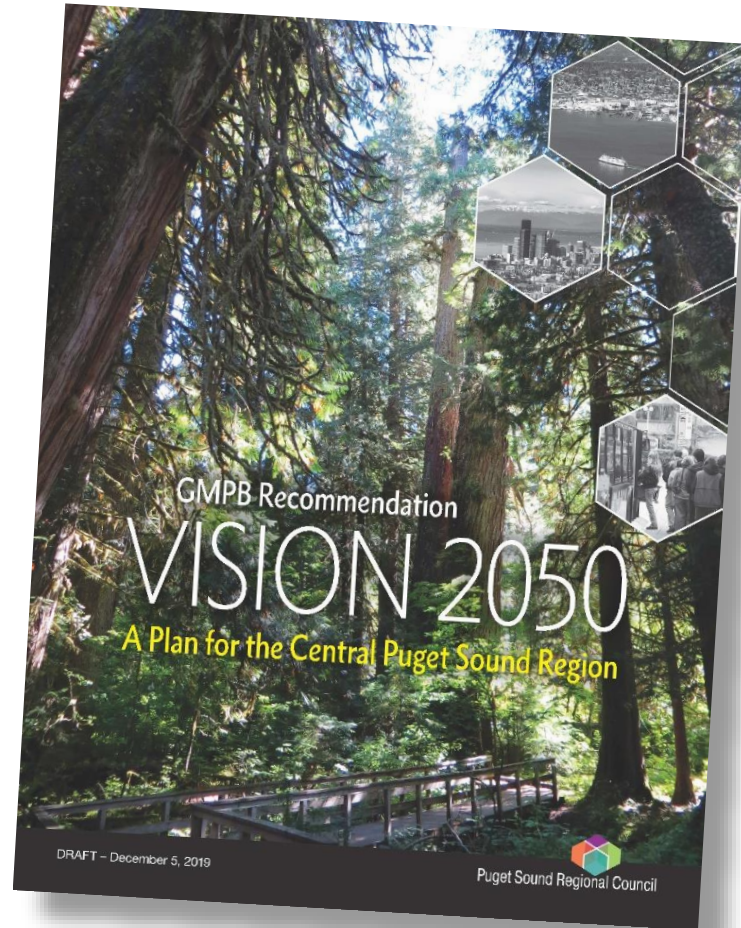
Average daily drive time



Better drive times – Average drive time, compared to 2014 baseline, is a greater reduction than alternatives



Adopted October 29, 2020



Implementation



Upcoming Planning Work



2022 Regional Transportation Plan

- Builds from VISION 2050
- Objectives:
 - Make progress on existing challenges, address current and future needs of the transportation system
 - Provide better data and analysis to support local investment planning (2024 comprehensive plans)
 - Plan for long-term system investments to accommodate future growth
 - Improve existing system, big picture thinking on future investments (aviation, rail, ferries)



Key Policy Focus Areas

Building from VISION 2050, board identified key policy areas:

- Access to transit
- Forward thinking/future investments – e.g., aviation, High Speed Rail
- Local agency needs
- Safety
- Equity
- Climate



Regional Aviation Baseline Study



Puget Sound Regional Council

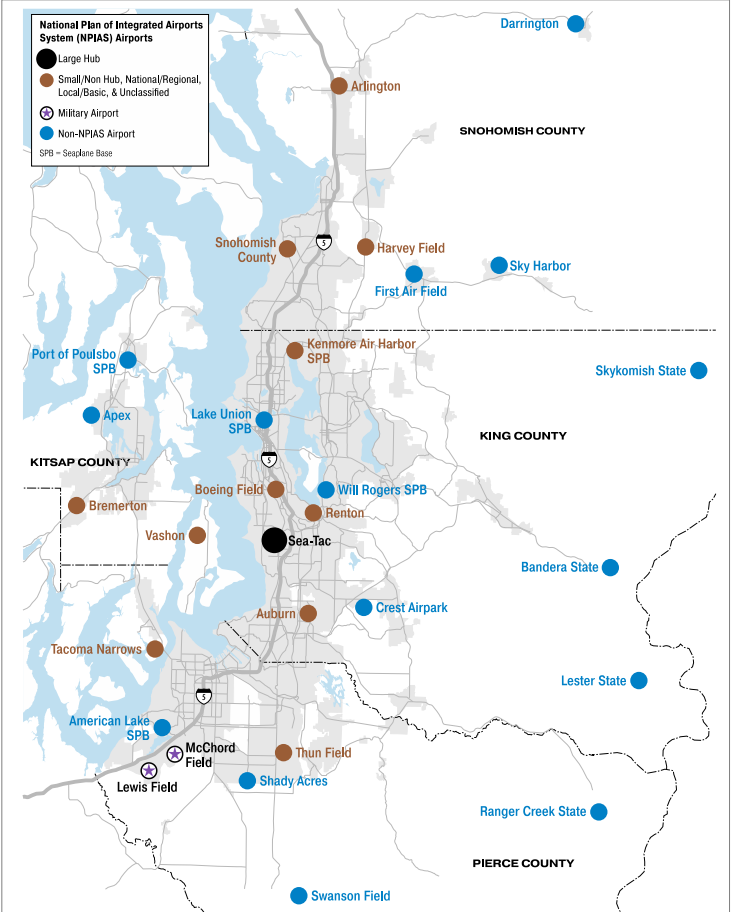
Regional Aviation Baseline Study

Study Objectives

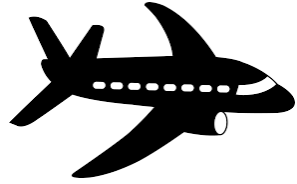
- Identify the roles of each airport and the aviation activities within the region based on existing planning efforts
- Provide a regional perspective on how aviation activities at airports in the region interact with each other, the community and the broader economy
- Obtain input from stakeholders about their needs and build a common understanding about aviation and airspace constraints
- Identify future aviation needs within the central Puget Sound Region and set the stage for future planning
- PSRC is not making recommendations on expansion of current airports or siting of new facilities



Study Area: 29 Regional Airports



Regional Forecasts



Commercial

Scheduled passenger service



Air Cargo

Freight and mail carried in the lower hold of passenger aircraft and on dedicated freighters



General Aviation

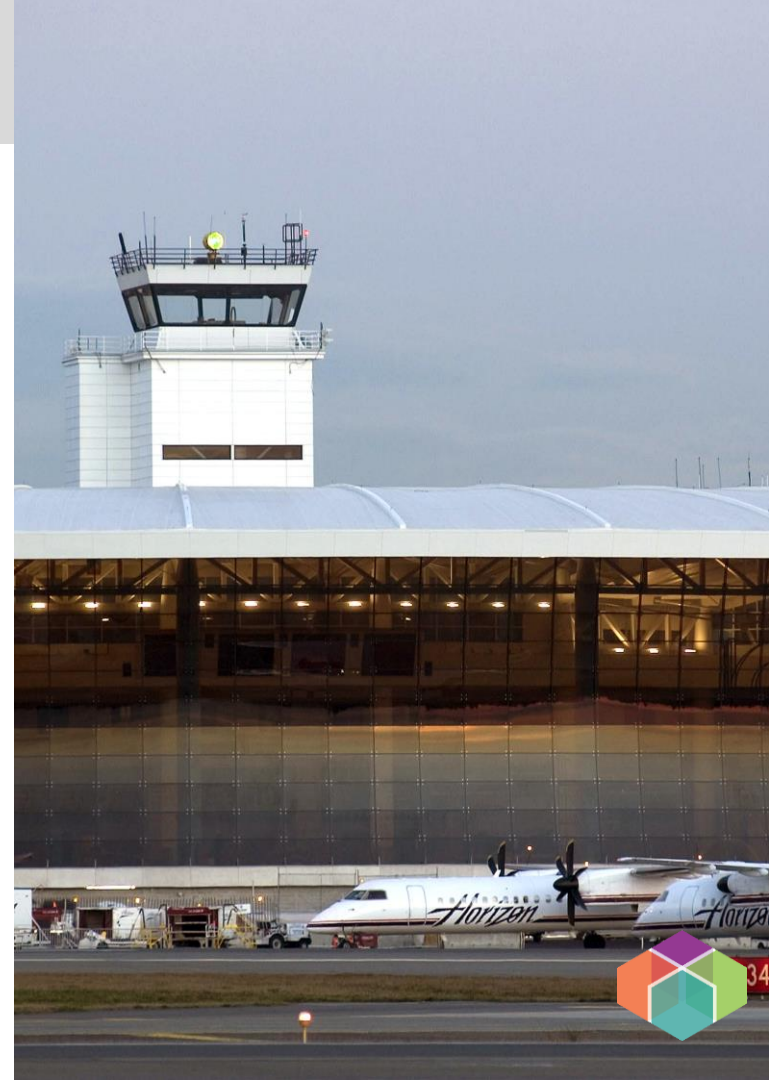
Business, flight instruction, medical, emergency, law enforcement, recreation, and tourism

Forecast represents regional demand for service in 2050 if unconstrained by airport or airspace capacity



Key Takeaways

- Demand for commercial service will more than double by 2050
 - Even with planned investments, Sea-Tac Airport will not be able to meet the region's 2050 demand for passenger air service
 - Drive times to Sea-Tac will get substantially worse for most of the region's residents
- Demand for air cargo will more than double by 2050
 - Investments will be needed to meet air cargo demands
- Demand for general aviation will increase by 1/3 by 2050
 - Region has capacity to meet general aviation demand, but capacity constraints exist at individual airports
- The region's airspace is complex and constrained



Commercial Forecast

Enplanements in the Central Puget Sound Region (millions)



Source: WSP USA Analysis. Enplanements = passenger boardings



COVID Impacts

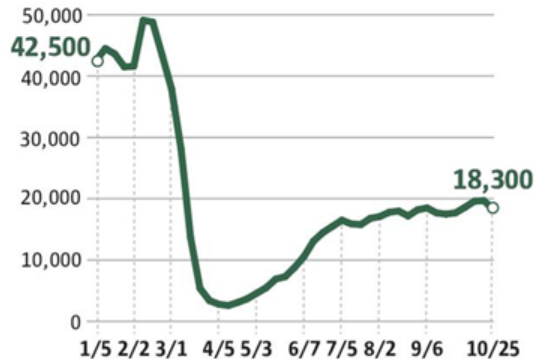
CORONAVIRUS ECONOMY DAILY CHART

Air travel at Sea-Tac stuck at roughly one-third of last year's level

The latest week brought a 7% dip in passengers going through Seattle-Tacoma International Airport. It's been months since passenger volume moved out of a narrow band consistently far below year-ago levels.

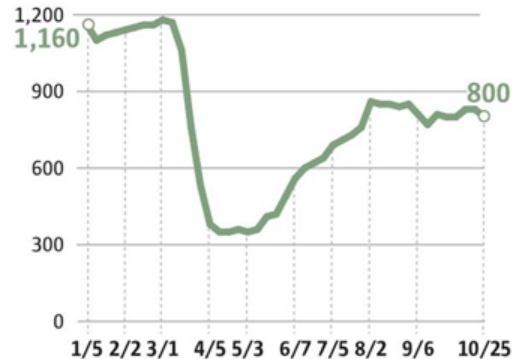
Week's daily average, for Sunday through Saturday

TSA-screened passenger volume



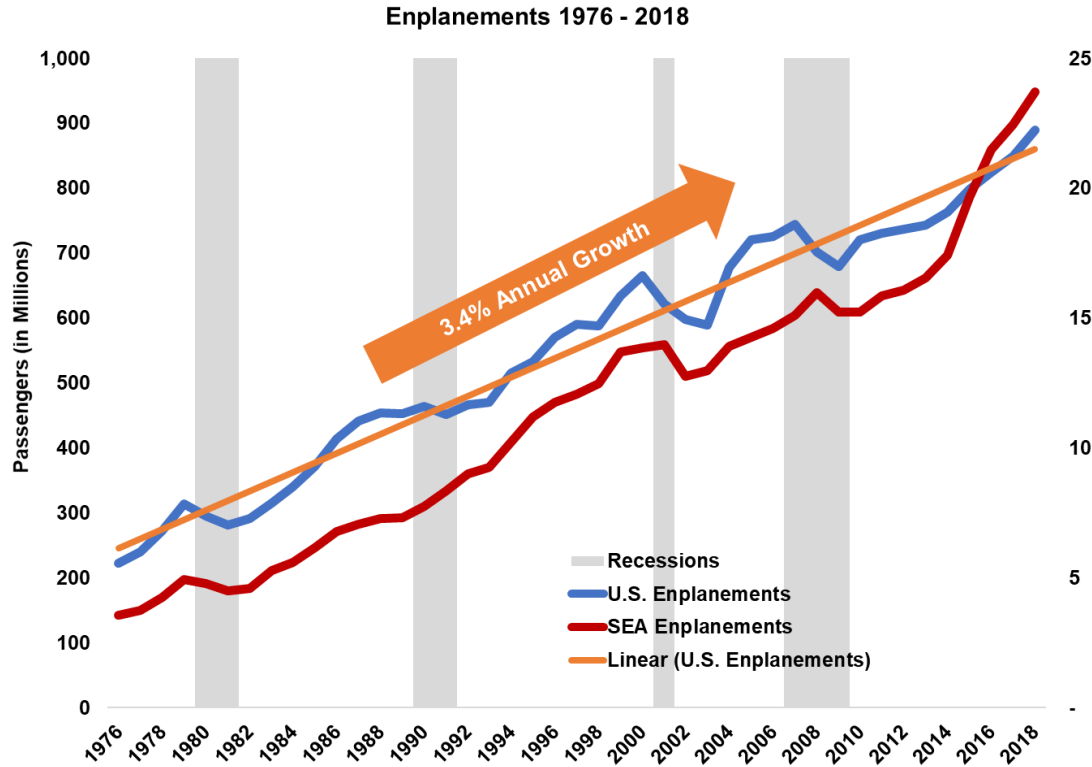
Source: Port of Seattle

Aircraft takeoffs and landings



THE SEATTLE TIMES

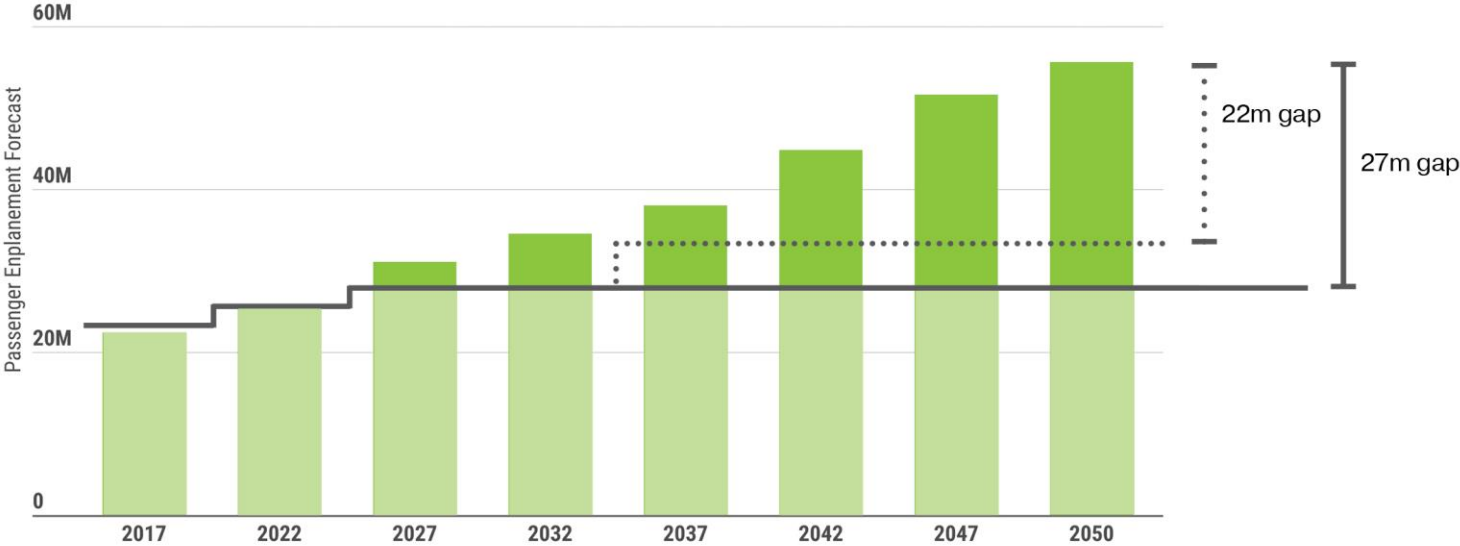
Long-Term Commercial Aviation Trends



Source: International Civil Aviation Organization (ICAO) for the U.S. Total, FAA Terminal Area Forecast (TAF) for SEA.

Commercial Service Gap Analysis

Combined Sea-Tac and Paine Field Commercial Capacity/Demand

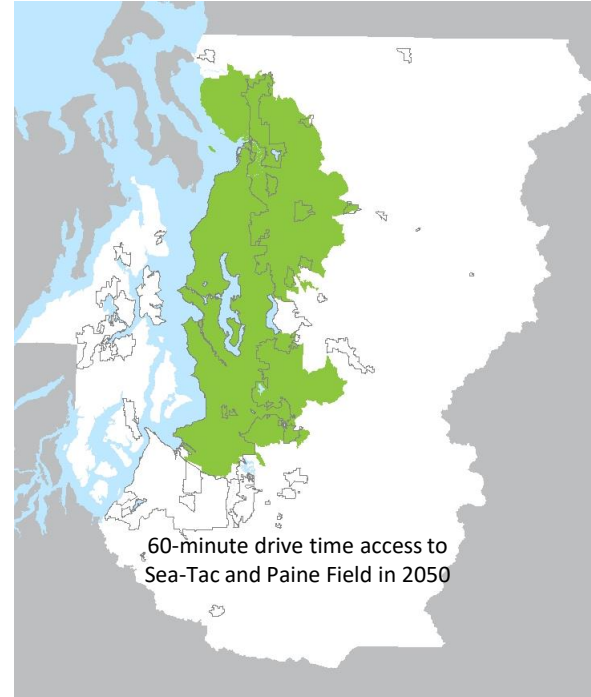


- Includes Sea-Tac 2027 SAMP Near Term Projects
- Includes Sea-Tac SAMP Long Term Vision Projects



Commercial Service Challenges

- Less reliable access to commercial air service for all of Pierce and Kitsap counties
- Sea-Tac does not have capacity to meet the regional unconstrained 2050 forecast of 55 million enplanements (SAMP's Near-Term Projects could accommodate about 28 million enplanements)
- Due to airspace and landside constraints, Boeing Field (KCIA) has limited ability to accommodate more passengers or expand
- Paine Field is currently limited to 600,000 annual enplanements (2018 Sup. EA)



General Aviation Forecast

General Aviation Operations in the Central Puget Sound Region



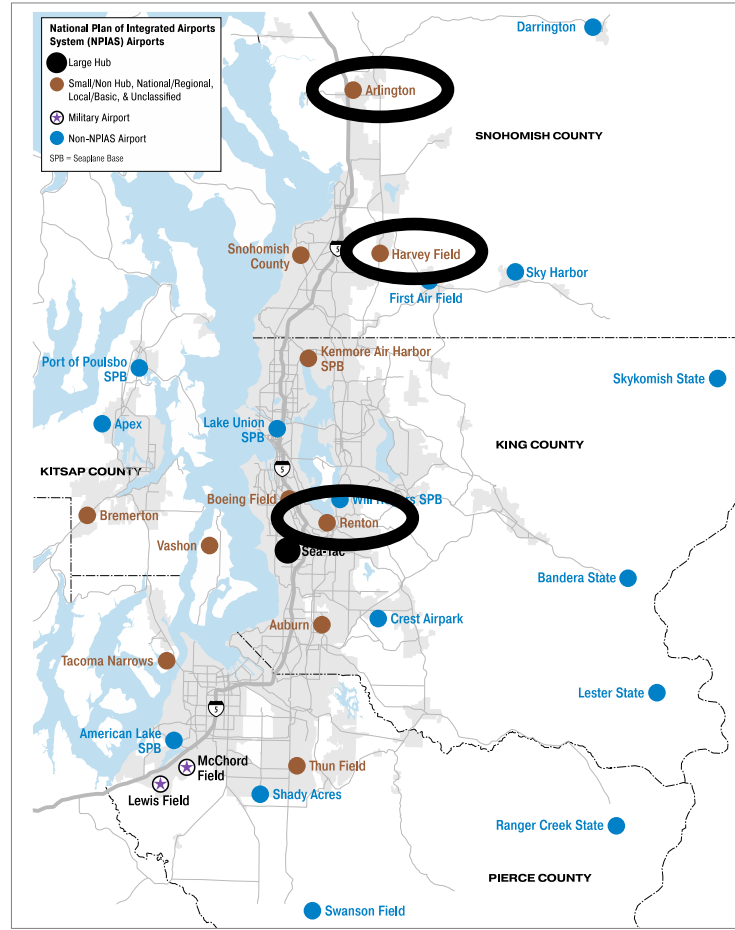
Source: FAA ATADS, NFDC, FAA Aerospace Forecast, and WSP. Operations = takeoffs + landings



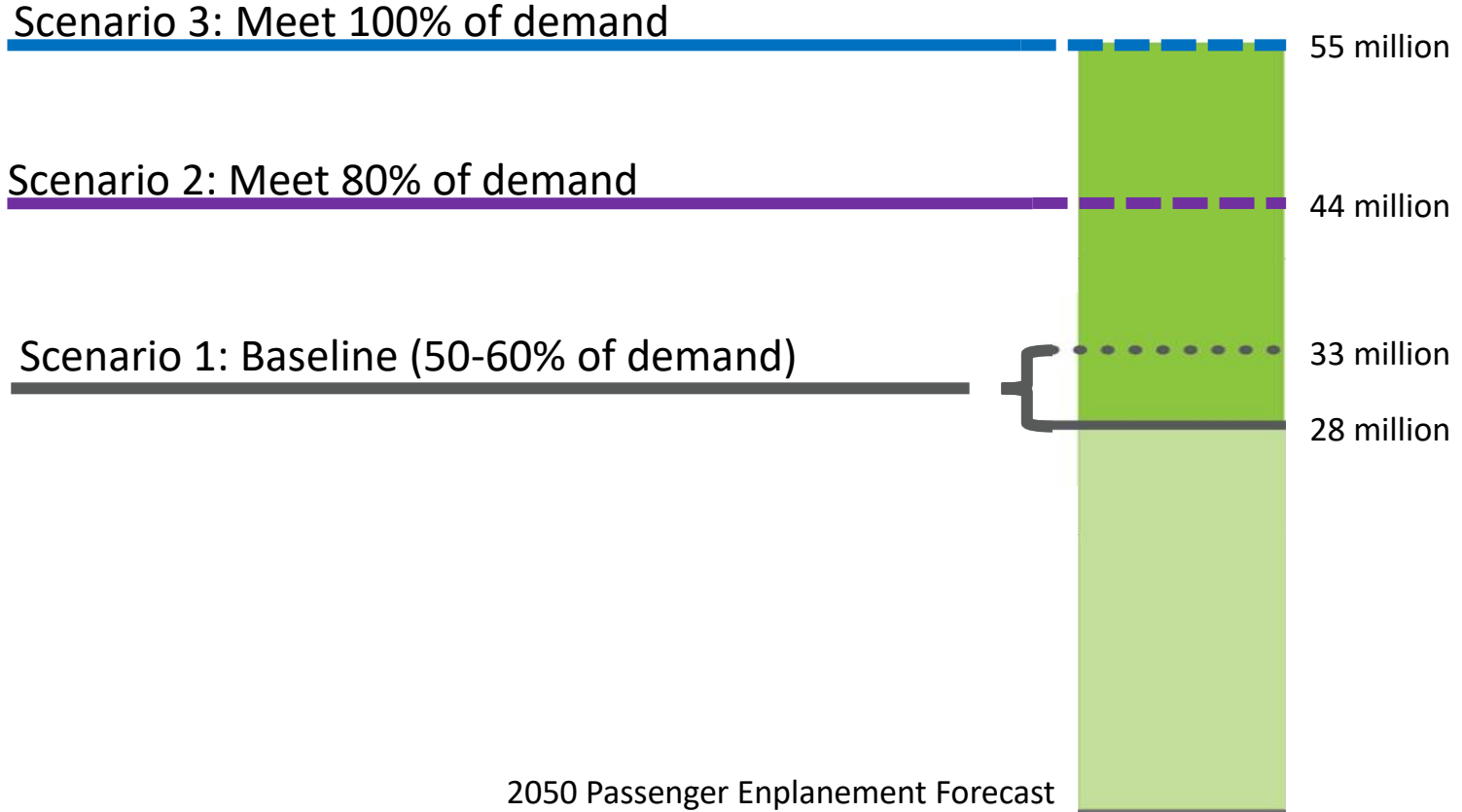
General Aviation Challenges

Airports approaching 80%
airfield capacity by 2050:

- Arlington Municipal
- Harvey Field
- Renton Municipal



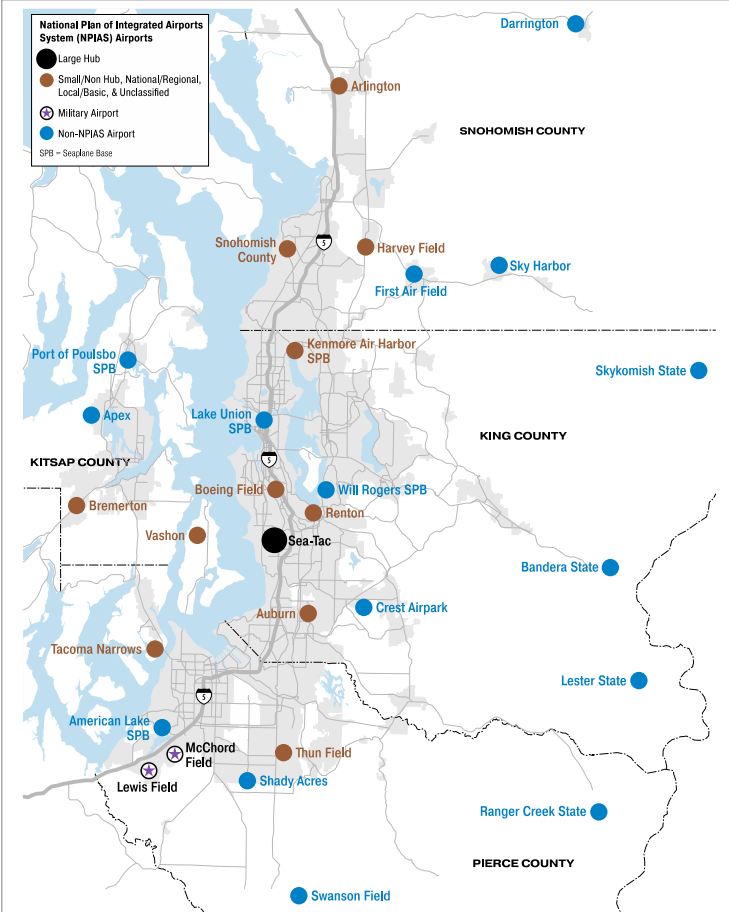
Scenarios Analyzed to Address 2050 Demand



Comparison of Scenarios

Scenario 1: Baseline 50-60% of 2050 demand met	Scenario 2 80% of 2050 demand met	Scenario 3 100% of 2050 demand met
460-540k annual operations 2 commercial airports 0 additional runways	720k annual operations 2-4 commercial airports 2 additional runways	900k total operations 2-5 commercial airports 3 additional runways
28-33 million enplanements 22-27 million unmet enplanements	44m enplanements 11 million unmet enplanements	55m enplanements 0 unmet enplanements
\$4-9 billion added annual benefit 27-61k added jobs	\$20 billion added annual benefit 135k added jobs	\$31 billion added annual benefit 209k added jobs

29 Regional Airports



Airport Evaluation Criteria

All 29 regional airports were analyzed for the ability to potentially accommodate commercial air service.

Evaluation criteria included:

- Ability to accommodate at minimum one 7,000 ft. runway
- Airfield capacity
- Airspace analysis
- Flood zone constraints
- Ownership considerations
- Impact to aerospace manufacturing
- Transportation infrastructure
- Proximity to population and jobs

Airport Screening Results

Only four airports met the minimum standards:

- **Arlington Municipal**
- **Bremerton National**
- **Paine Field**
- **Tacoma Narrows**

PSRC is not recommending new or expanded commercial air service at any of these airports. The decision to accommodate commercial air service rests solely with the airport sponsor.

Public input

The Regional Aviation Baseline Study team collected input through 4 primary methods:

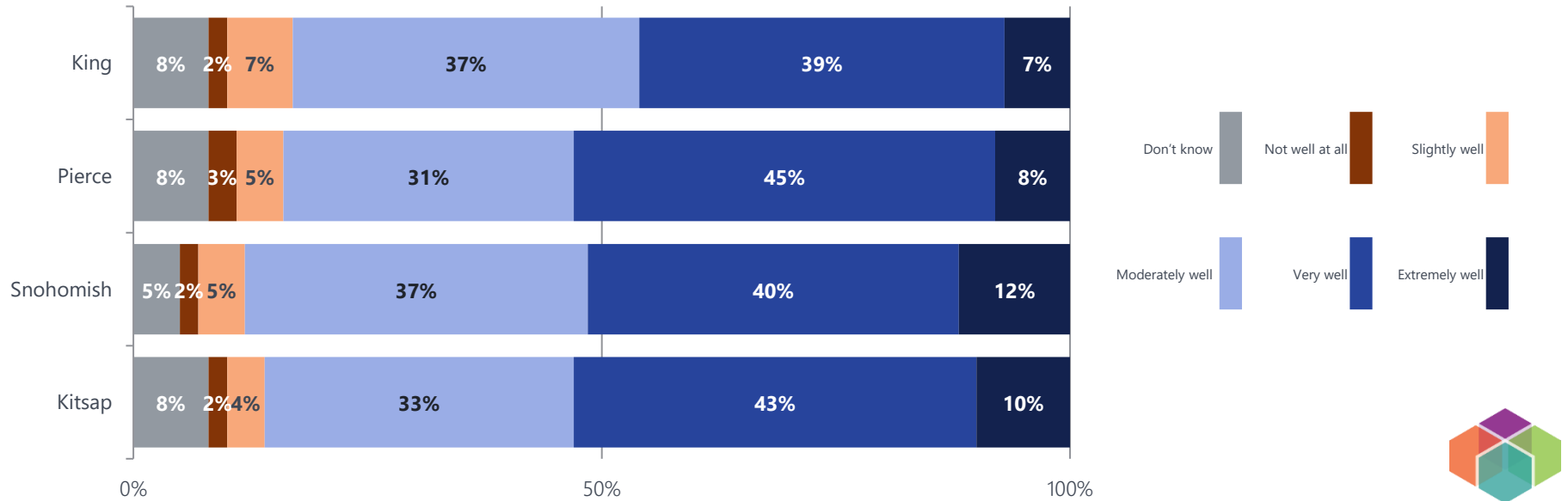
- **Survey**
 - Statistically valid survey of residents in the four-county region
 - 1,416 respondents
- **Interviews with residents of the four-county region**
 - Replaced focus groups (due to COVID-19)
 - 22 interviews
- **Poll questions and comments through our online open house**
 - Online open house opened September 21
 - Will run through October 31
 - 377 participants as of October 19
- **Poll questions at virtual public meetings**
 - Three public meetings: September 23, 29, and 30
 - 176 participants total



Overall, respondents agreed that the aviation system is working well

Overall, how well do you think the passenger aviation system in the central Puget Sound region was working prior to the COVID-19 situation?

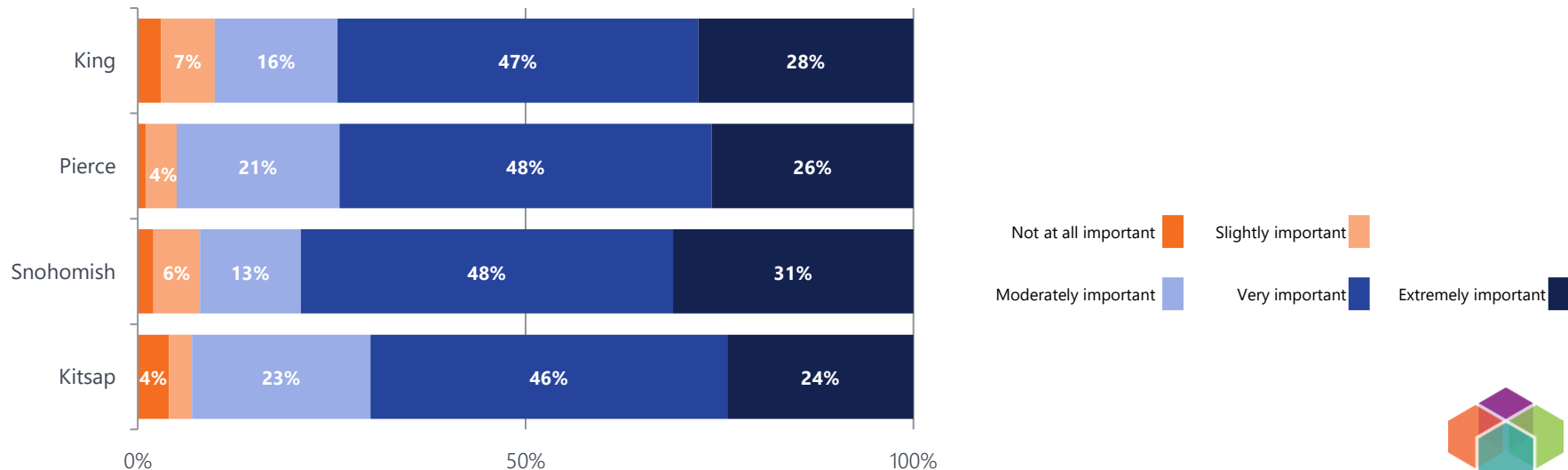
Base: all respondents (n = 1316)



People in all four counties think it is important for the region to accommodate growing future demand for passenger aviation service

How important do you think it is for the central Puget Sound region to be able to accommodate growing future demand for passenger aviation service?

Base: all respondents (n = 1315)



Thank you.

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