

OREGON AVIATION PLAN
2016 Economic Impact Statement
for NPIAS Airports



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OVERVIEW

The *2014 Oregon Aviation Plan Economic Impact Study (2014 OAP EIS)* is presented by the Oregon Department of Aviation (ODA) and addresses the economic contribution of aviation by Federal Aviation Administration (FAA) National Plan of Integrated Airport Systems (NPIAS) airports to the Oregon state economy, updating the most recent study, which was completed in 2007.

Airports are a key asset to Oregon commerce, providing transportation, employment and real estate for commercial and industrial development, in addition to being infrastructure essential to emergency response, medical evacuation, fire protection and freight transport. NPIAS airports contribute more than \$8.7 billion to the Oregon economy annually and provide Oregon businesses and residents with just in time shipments of the goods that keeping Oregon's businesses moving.

Other modes of transportation cannot compete with aviation's ability to move people and products to where they are most needed safely, quickly and efficiently. Airports are a key component of the state's infrastructure, allowing Oregon businesses to do business at a global scale, creating economic growth and opportunity that reaches far outside the airport property.

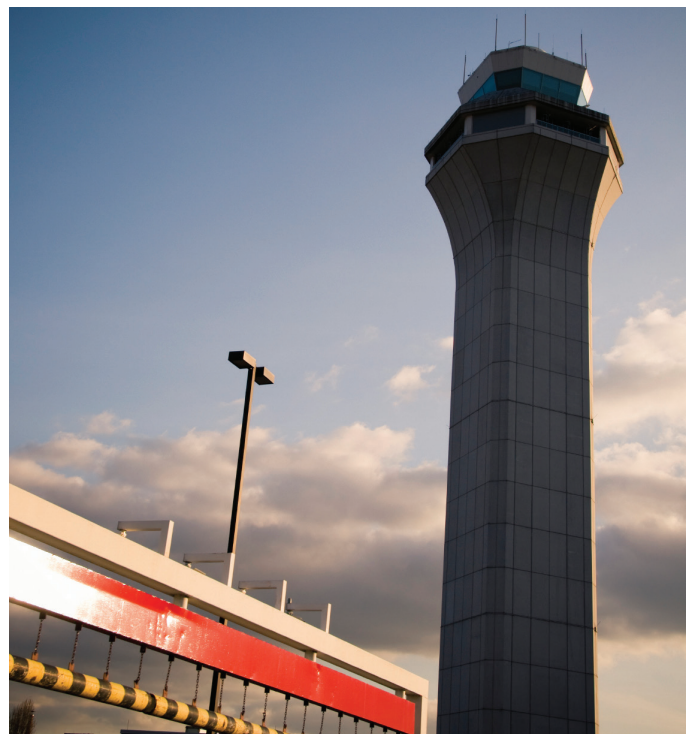
Economic impacts of airports include on-airport economic activities, as well as spending off-airport by visiting air travelers and those employed by on-airport businesses. This executive summary presents totals for the state and the five state regions as defined by the Oregon Department of Transportation (ODOT). The economic impact of individual airport studies and the methodology used to complete the analysis are presented in the complete report.

2012 ECONOMIC IMPACT OF OREGON AIRPORTS

IMPACT TYPE	JOBS	WAGES	BUSINESS SALES
DIRECT CONTRIBUTION			
On-Airport (including FBO and air related tenants)	6,867	\$393,445,000	\$1,475,371,000
Off-Airport: Visitor Spending	5,197	\$88,556,000	\$342,540,000
Subtotal: Total Direct Contribution	12,064	\$482,001,000	\$1,817,911,000
SPIN-OFF EFFECTS: SUPPLIERS AND RE-SPENDING			
Due to On Airport Aviation	10,215	\$307,040,000	\$1,175,419,000
Due to Visitor Spending	2,161	\$80,249,000	\$250,918,000
Subtotal: Spin-Off Effects	12,376	\$387,289,000	\$1,426,337,000
Subtotal: Total Aviation-Related Impacts	24,440	\$869,290,000	\$3,244,248,000
PORTLAND INTERNATIONAL AIRPORT*			
Airport Generated	16,308	\$922,000,000	3,244,248,000
Visitor Generated	35,963	\$1,020,400,000	\$1,752,700,000
Subtotal: Portland International Airport Impacts	52,271	\$1,942,500,000	\$5,477,700,000
TOTAL AVIATION RELATED IMPACTS	76,711	\$2,811,700,000	\$8,721,948,000

Sources: Airport and tenant surveys, EDR Group and Mead & Hunt analyses and IMPLAN econometric package.

* Portland International Airport totals taken directly from *The Local and Regional Economic Impacts of the Port of Portland, 2011*.



THE STATE ECONOMY

The 2007 and 2014 ODA studies bracketed the national economic recession that began in late 2008. From 2007 to 2012, the Oregon gross state product increased by 15 percent, but worker earnings fell by 2 percent, and the number of jobs fell by 3 percent. Together, these data indicate that productivity per job of Oregon workers has increased, meaning on average it takes more economic activity to create a job and generate wages to those who are working.

Economic changes are also seen in air cargo. The International Trade Administration of the U.S. Census Bureau traces annual value and metric ton-

nage of international air exports from point of origin as well as by airport. (This data set is not available for domestic cargo shipments). Tonnage has decreased by 27 percent for goods produced in Oregon and shipped from Oregon airports (primarily Portland International Airport), while the value of Oregon generated goods has increased by 63 percent in constant value. Thus, less production is needed to sustain overall value across commodities. For domestic cargo shipments, Portland International Airport reported 127,890 tons enplaned in 2007 and 91,480 tons in 2012, a decrease of 28 percent.

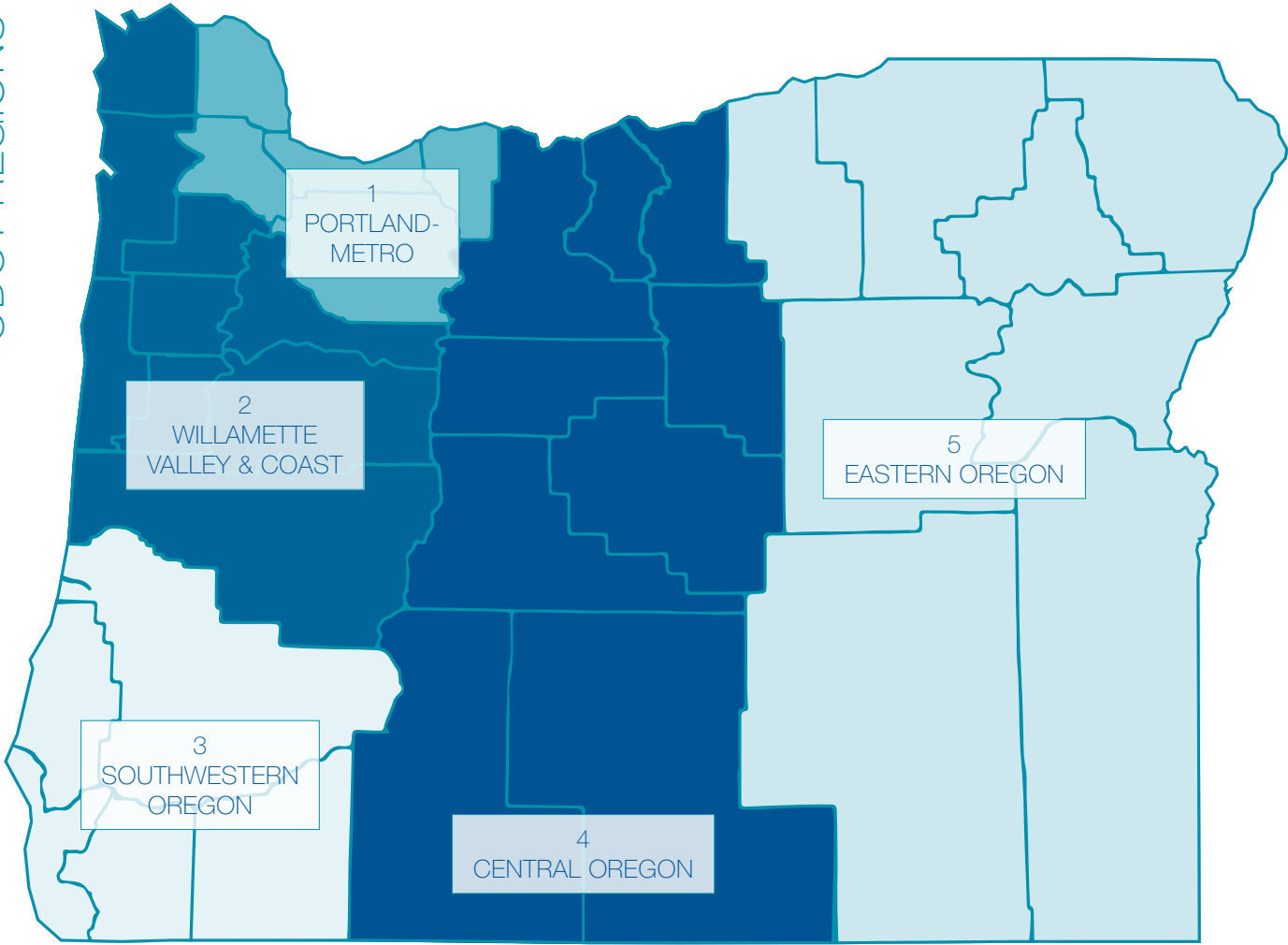


REGIONAL ANALYSIS

ODOT breaks the state into five regions. The table presented on the next page shows the economic contributions of airports to each of the five regional economies within Oregon. The contribution made by an airport to a regional economy and the state economy differ for two reasons:

- Regional impacts account for visitors from other regions in Oregon, as well as from out of state. When measuring contributions to the state economy, only travelers arriving from out of state are counted.
- Economic multipliers (spin-off effects) for the state are larger than regional spin-offs. This is because regional analyses are limited to regional borders when accounting for multiplier effects. Transactions that cross a regional border but stay within Oregon are not counted in the analyses of regional economic impacts, but are counted in the statewide context. For example, if a business or consumer purchases a computer one town over a regional boundary, that purchase would be counted in the Oregon economy, but not in the regional economy.

ODOT REGIONS



REGIONAL IMPACT OF OREGON'S AIRPORTS					
ECONOMIC ACTIVITY	REGION 1*	REGION 2	REGION 3	REGION 4	REGION 5
Jobs	55,747	11,658	6,071	2,514	721
Payroll	\$2.1 billion	\$446 million	\$169 million	\$64 million	\$21 million
Business Sales	\$6.0 billion	\$1.6 billion	\$675 million	\$312 million	\$86 million

Sources: Airport and tenant surveys, EDR Group and Mead & Hunt analyses and IMPLAN econometric package. Totals include spin-off effects.
 * Portland International Airport totals taken directly from The Local and Regional Economic Impacts of the Port of Portland, 2011.

Before introducing the differences in the 2007 Oregon Aviation Plan (2007 OAP) and 2014 OAP EIS, it is important to put the two studies in proper context. The scope of the 2007 and 2014 ODA studies have two major differences.

The 2007 OAP included 93 public use airports in the state of Oregon, other than those operated by the Port of Portland. The 2014 OAP EIS studies 56 NPIAS airports, including three airports (Wasco State Airport, Hillsboro Airport and Troutdale Airport) that were not in the 2007 OAP.

The second difference is that on-airport impacts counted in the 2007 OAP included both aviation related and non-aviation related tenants. The 2014 OAP EIS is limited to aviation related tenants. For purposes of fair comparison, non-aviation related tenants are omitted from the 2007 OAP numbers presented below.

NPIAS AIRPORT ECONOMIC IMPACT COMPARISON: 2007 VS. 2012			
ECONOMIC ACTIVITY	2007	2012*	PERCENT CHANGE
JOBS			
Total Aviation Impacts	29,418	21,430	-27%
Reliant / Dependent Impacts	91,645	71,408	-22%
Portland International Airport**	57,911	52,271	-10%
Total	178,974	145,109	-19%
PAYROLL			
Total Aviation Impacts	\$867 million	\$724 million	-16%
Reliant / Dependent Impacts	\$4.2 billion	\$4.4 billion	+5%
Portland International Airport**	\$2.0 billion	\$1.9 billion	-4%
Total	\$7.1 billion	\$7.0 billion	-2%
BUSINESS SALES			
Total Aviation Impacts	\$2.7 billion	\$2.8 billion	+4%
Reliant / Dependent Impacts	\$17.5 billion	\$14.4 billion	-18%
Portland International Airport**	\$5.8 billion	\$5.5 billion	-3%
Total	\$26.0 billion	\$22.7 billion	-12%

*The 2014 OAP EIS did not include the non-NPIAS airports included in the 2007 study. For the purposes of this comparison, non-NPIAS airports have been removed from the 2007 study results.

**Portland International Airport base year data is 2006 and 2011.

AVIATION METRICS

The core metrics that form the basis of airport impacts are on-airport jobs and visitor spending, and both are subject to changes in regional, state and national economies. Aviation related jobs on airports fell 18 percent from 7,287 to 5,964, which is largely attributable to changes of tenants and closure of some large businesses across the state due to the recession.

Visitor spending is driven primarily by commercial enplanements, the percent of enplanements that are visitors, and the spending per visitor per trip. The comparisons of these metrics from the 2007 to 2014 studies are mixed. Commercial enplanements at six air carrier airports increased by 6 percent,

from 910,095 to 967,021, and the number of commercial visitors also increased by 9 percent from 368,108 in 2007 to 401,129 in 2012. Statewide, the percent of enplaned passengers who were visitors was stable, 41 percent in 2007 and 40 percent in 2012. However, spending per visitor decreased at four of six airports. Visitor spending from general aviation operations is a function of itinerant arrivals (50 percent of itinerant operations), and these operations fell by 4 percent from 314,297 to 303,084, and the number of passenger per aircraft also declined. Visitors from general aviation operations fell by 11 percent from 794,555 in 2007 to 709,212 in 2012.



STUDY HIGHLIGHTS

- Oregon public use airports directly employ 6,800 people in aviation-related businesses, and these businesses expended \$393 million in wages annually.
- Employees of Oregon public use airports and on-airport businesses earned an average salary \$57,000 per year. These include those administering and maintaining airport facilities, maintaining aircraft, providing services to commercial airline passengers, airline crews and other airline employees.
- There are 5,200 jobs in Oregon that are directly attributed to spending by visitors to the state who came by aircraft. Visitor industry employees earned an average annual salary of \$17,000.
- Air cargo and business travel services directly contribute \$8 billion to Oregon's economy by enabling long distance sales of goods and services produced in Oregon. In-state production that is supported by aviation supports more than 23,700 jobs. In 2011, Portland International Airport shipped \$27.6 billion in air freight, supporting nearly 296,000 jobs.



PREPARED BY



Chapter 1 Introduction

The state of Oregon has an extensive aviation system spread throughout the state, providing valuable transportation options for the public which range from small emergency use airports in remote regions to the extensive passenger enplanements at Portland International. Managing such a large and diverse system of airports can be a daunting task if a comprehensive plan isn't in place to serve as a guide. In addition, with the ever increasing demands for project funding, it is imperative that the Oregon Department of Aviation (ODA) have a solid inventory, understanding of need, and plan for development for the entire state aviation system to meet the needs of existing and future development.

This report is a combination of three studies which will guide the development of the aviation system in Oregon for years to come. This document is organized into three distinct sections. *Chapter Two* summarizes the overall study goals, roles, and methodologies used to develop the study. *Chapter Three* is a summary of the various inventory efforts associated with the individual airport facilities. *Chapter Four* contains specific roles, recommendations, and funding options for the airport. This report will provide each community with information which can guide the development of each facility in an orderly, economic, and environmentally friendly manner.

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Chapter 2

The growing aviation demand in Oregon has prompted the Oregon Department of Aviation (ODA) to update the previous State Aviation System Plan published in 2000 and develop economic impact assessments that gauge the benefits of aviation to the state. Oregon is currently experiencing an unprecedented growth in population as well as aircraft operations. In order for the state to continue to provide a safe and efficient aviation system while accommodating growth, it is important to evaluate what facilities and capabilities are here today and what will be needed for tomorrow.

This chapter is organized into the following sections:

- 2.1 *Oregon Aviation Plan 2007 (OAP 2007)* Study Components
- 2.2 Overall Study Goals & Objectives
- 2.3 Airport Functional Roles
- 2.4 Performance Measures
- 2.5 Summary

2.1 *Oregon Aviation Plan 2007 (OAP 2007)* Study Components

Three unique studies were originally undertaken which resulted in the development of the *OAP 2007*. This included a traditional state aviation system plan update which was developed to meet Federal Aviation Administration (FAA) requirements. An economic impact study was completed to assess the economic value of the aviation system at the state and local levels. The state aviation master plan component evaluated airports not included within the traditional state system plan criteria, as well as evaluating additional areas of interest or special consideration topics. The aforementioned goals were originally distributed over these three separate studies as outlined above, however, since there were numerous commonalities between the studies, they were combined into a single report for greater ease of use. Additional detail on each of these three studies is listed below. The information contained in the *OAP 2007* is the compilation of information, findings, and recommendations for all three studies.

2.1.a State Aviation System Plan

The *OAP 2007* addresses many different issues related to each individual airport and regional and state aviation system components. It is important to have a comprehensive understanding of the existing facilities, the need for future facilities, and the feasibility of reaching future goals. A state aviation system plan update is based upon sound evaluation of existing facilities, coupled with a clear understanding of the state and nation aviation interests, as well as the needs of the general public. The methodology used to evaluate the state system is consistent with that advocated for use by the FAA in Advisory Circular (AC) 150/5070-7 — *The Airport System*

Planning Process, issued November 10, 2004. All 97 public-use airports are listed in **Table 2.1 – Public-Use Airports in Oregon**. Their associated city, FAA classification, and their type of ownership are noted within the table.

The *OAP 2007* includes 66 public-use airports, which are part of the National Plan of Integrated Airport Systems (NPIAS). The study group of airports was based upon extensive coordination with the ODA and the FAA. The study group includes the 57 airports currently listed on the NPIAS, eight state-owned airports which serve either a recreational/tourism base or have more than two based aircraft, and one privately owned airport, which serves a significant number of based aircraft.

2.1.b State Aviation Master Plan

The state aviation master plan element of the *OAP 2007* was included to ensure a comprehensive evaluation of all public-use airports within Oregon and was funded independently by the ODA. There are an additional 31 public-use airports in Oregon that were not included in the federally funded state aviation system plan component (NPIAS). These airports were evaluated using the same methodology of the state aviation system plan to provide the ODA a complete inventory of the state's aviation system resources. In addition to the evaluation of individual airports, the state aviation master plan was designed to evaluate broader, more conceptual issues related to the entire state aviation system. The evaluation of these issues will help the ODA better manage and improve the state system of airports.

2.1.c State Aviation Economic Impact Study

With the movement towards a global economy, it is now recognized that airports are no longer just another mode of transportation. Airports are vital components of the economic engine that drives the state, regional, and local economic climate and it is essential the state system of airports support these economies by providing adequate facilities and services. This study will provide the ODA, individual communities, airports and governmental agencies, and politicians the opportunity to assess the economic value of the aviation system as a whole as well as each individual airport. All 97 public-use airports, as shown in **Table 2.1**, are included in the analysis.

Table 2.1 Public-Use Airports in Oregon

<i>Associated City</i>	<i>Airport Name</i>	<i>NPIAS Status</i>	<i>Ownership</i>
Albany	Albany Municipal Airport	Yes	Publicly Owned
Alkali Lake	Alkali Lake State Airport	No	Publicly Owned
Arlington	Arlington Municipal Airport	No	Publicly Owned
Ashland	Ashland Municipal Airport - Sumner Parker Field	Yes	Publicly Owned
Astoria	Astoria Regional Airport	Yes	Publicly Owned
Aurora	Aurora State Airport	Yes	Publicly Owned
Baker City	Baker City Municipal Airport	Yes	Publicly Owned
Bandon	Bandon State Airport	Yes	Publicly Owned
Beaver Marsh	Beaver Marsh Airport	No	Privately Owned
Bend	Bend Municipal Airport	Yes	Publicly Owned
Boardman	Boardman Airport	Yes	Publicly Owned
Brookings	Brookings Airport	Yes	Publicly Owned
Burns	Burns Municipal Airport	Yes	Publicly Owned
Cascade Locks	Cascade Locks State Airport	No	Publicly Owned
Cave Junction	Illinois Valley Airport	Yes	Publicly Owned
Chiloquin	Chiloquin State Airport	Yes	Publicly Owned
Christmas Valley	Christmas Valley Airport	Yes	Publicly Owned
Clearwater	Toketee State Airport	No	Publicly Owned
Condon	Condon State Airport – Pauling Field	Yes	Publicly Owned
Cornelius	Skyport Airport	No	Privately Owned
Corvallis	Corvallis Municipal Airport	Yes	Publicly Owned
Cottage Grove	Cottage Grove State Airport – Jim Wright Field	Yes	Publicly Owned
Crescent Lake	Crescent Lake State Airport	No	Publicly Owned
Creswell	Creswell Hobby Field	Yes	Publicly Owned
Culver	Lake Billy Chinook Airport	No	Privately Owned
Denmark	Cape Blanco State Airport	No	Publicly Owned
Enterprise	Enterprise Municipal Airport	No	Publicly Owned
Estacada	Valley View Airport	No	Privately Owned
Eugene	Eugene Mahlon Sweet Field	Yes	Publicly Owned
Florence	Florence Municipal Airport	Yes	Publicly Owned
Florence	Lake Woahink Seaplane Base - <i>closed</i>	No	Privately Owned
Gates	Davis Field	No	Privately Owned

Table 2.1 Public-Use Airports in Oregon (Continued)

<i>Associated City</i>	<i>Airport Name</i>	<i>NPIAS Status</i>	<i>Ownership</i>
Gleneden Beach	Siletz Bay State Airport	Yes	Publicly Owned
Gold Beach	Gold Beach Municipal Airport	Yes	Publicly Owned
Grants Pass	Grants Pass Airport	Yes	Publicly Owned
Hermiston	Hermiston Municipal Airport	Yes	Publicly Owned
Hillsboro	Stark's Twin Oaks Airpark	No	Privately Owned
Hood River	Ken Jernstedt Airfield	Yes	Publicly Owned
Hubbard	Lenhardt Airpark	No	Privately Owned
Imnaha	Memaloose Airport (USFS)	No	Publicly Owned
Independence	Independence State Airport	Yes	Publicly Owned
John Day	Grant County Regional Airport – Ogilvie Field	Yes	Publicly Owned
Joseph	Joseph State Airport	Yes	Publicly Owned
Klamath Falls	Klamath Falls Airport	Yes	Publicly Owned
La Grande	La Grande / Union County Airport	Yes	Publicly Owned
Lakeside	Lakeside Municipal Airport	No	Publicly Owned
Lakeview	Lake County Airport	Yes	Publicly Owned
Lebanon	Lebanon State Airport	Yes	Publicly Owned
Lexington	Lexington Airport	Yes	Publicly Owned
Madras	Madras City - County Airport	Yes	Publicly Owned
Malin	Malin Airport	No	Publicly Owned
Manzanita	Nehalem Bay State Airport	No	Publicly Owned
McDermitt	McDermitt State Airport	Yes	Publicly Owned
McKenzie Bridge	McKenzie Bridge State Airport	No	Publicly Owned
McMinnville	McMinnville Municipal Airport	Yes	Publicly Owned
Medford	Rogue Valley International – Medford Airport	Yes	Publicly Owned
Monument	Monument Municipal Airport	No	Publicly Owned
Myrtle Creek	Myrtle Creek Municipal Airport	Yes	Publicly Owned
Newberg	Chehalem Airpark	No	Privately Owned
Newberg	Sportsman Airpark	Yes	Privately Owned
Newport	Newport Municipal Airport	Yes	Publicly Owned
North Bend	Southwest Oregon Regional Airport	Yes	Publicly Owned
Oakridge	Oakridge State Airport	No	Publicly Owned
Ontario	Ontario Municipal Airport	Yes	Publicly Owned
Owyhee	Owyhee Reservoir State Airport	No	Publicly Owned

Table 2.1 Public-Use Airports in Oregon (Continued)

<i>Associated City</i>	<i>Airport Name</i>	<i>NPIAS Status</i>	<i>Ownership</i>
Pacific City	Pacific City State Airport	No	Publicly Owned
Paisley	Paisley Airport	No	Publicly Owned
Pendleton	Eastern Oregon Regional Airport at Pendleton	Yes	Publicly Owned
Pinehurst	Pinehurst State Airport	No	Publicly Owned
Portland	Portland Downtown Heliport	Yes	Publicly Owned
Portland	Portland International Airport	Yes	Publicly Owned
Portland	Portland Hillsboro Airport	Yes	Publicly Owned
Portland	Portland Mulino Airport	Yes	Publicly Owned
Portland	Portland Troutdale Airport	Yes	Publicly Owned
Powers	Powers Hayes Field	No	Publicly Owned
Prineville	Prineville Airport	Yes	Publicly Owned
Prospect	Prospect State Airport	No	Publicly Owned
Redmond	Redmond Municipal Airport - Roberts Field	Yes	Publicly Owned
Rome	Rome State Airport	No	Publicly Owned
Roseburg	Roseburg Regional Airport	Yes	Publicly Owned
Roseburg	George Felt Airport	No	Privately Owned
Salem	Salem McNary Field	Yes	Publicly Owned
Sandy	Country Squire Airpark	No	Privately Owned
Sandy	Sandy River Airport	No	Privately Owned
Santiam Junction	Santiam Junction State Airport	No	Publicly Owned
Scappoose	Scappoose Industrial Airpark	Yes	Publicly Owned
Seaside	Seaside Municipal Airport	Yes	Publicly Owned
Silver Lake	Silver Lake Strip (USFS)	No	Publicly Owned
Sisters	Sisters Eagle Air Airport	No	Privately Owned
Sunriver	Sunriver Airport	Yes	Privately Owned
The Dalles	Columbia Gorge Regional Airport – The Dalles Municipal Airport	Yes	Publicly Owned
Tillamook	Tillamook Airport	Yes	Publicly Owned
Toledo	Toledo State Airport	No	Publicly Owned
Vale	Miller Memorial Airpark	No	Publicly Owned
Vernonia	Vernonia Municipal Airport	No	Publicly Owned
Waldport	Wakonda Beach State Airport	No	Publicly Owned
Wasco	Wasco State Airport	Yes	Publicly Owned

2.2 Overall Study Goals & Objectives

The primary goal of the three studies is to provide a comprehensive plan which addresses all public-use airports in the state of Oregon and which identifies how to improve individual airports as part of the larger state system, to meet the needs of tourism, economic development, and transportation services for each community and the state as a whole.

This information provides the framework that supports informed decisions related to planning and developing the Oregon aviation system. The objectives of these studies are to:

- Assess aviation facilities: including airside, landside, and ground facilities and services, and general aviation needs
- Assess the economic value of airport facilities to the host community as well as the overall importance to the state
- Provide guidance for the development of the Oregon system of airports to meet the state's future aviation needs to ensure the safety and efficiency of the state aviation system
- Enhance communication opportunities among ODA, airport sponsors, local government, other state and federal agencies, and airport users so that the future development of the state aviation system can be more readily accomplished
- Provide each airport the direction to develop their airport to meet the needs of the state aviation system and local community as well as promote the airport for the purposes of economic development and tourism

Each of these individual studies is a portion of the overall process necessary to create a systematic approach to meeting the improvements which are identified, as well as proposing development strategies. This report provides a summary of the results of three planning studies undertaken by ODA to assess the condition of the existing aviation infrastructure, the economic benefit of the aviation industry, and the passenger demands for air service.

2.3 Airport Functional Roles

Each airport in the state impacts the overall operational capacity and efficiency of the state aviation system by supporting different types and levels of aviation activity. The types of facilities and services that should be provided at each category of airport were determined throughout the development of this plan. Airport functional roles have been broken out into five categories and the following criteria were utilized to classify the airports:

- Current airport infrastructure, facilities, and services
- Aviation activity levels and type of aviation demand served
- Ability to accommodate future growth
- Accessibility and geographic service area

The five airport functional roles are defined on the following page.

Category I – Commercial Service Airports

These airports support some level of scheduled commercial airline service in addition to a full range of general aviation aircraft. This includes both domestic and international destinations.

Category II – Urban General Aviation Airports

These airports support all general aviation aircraft and accommodate corporate aviation activity, including business jets, helicopters, and other general aviation activity. These airports' primary users are business related and service a large geographic region or they experience high levels of general aviation activity.

Category III – Regional General Aviation Airports

These airports support most twin- and single-engine aircraft and may also accommodate occasional business jets. These airports support a regional transportation need.

Category IV – Local General Aviation Airports

These airports support primarily single-engine, general aviation aircraft, but are capable of accommodating smaller twin-engine general aviation aircraft. These airports support local air transportation needs and special use aviation activities.

Category V – RAES (Remote Access/Emergency Service) Airports

These airports support primarily single-engine, general aviation aircraft, special use aviation activities, and access to remote areas or provide emergency service access.

Volume I of the *OAP 2007* displays all airports within their various categories.

2.4 Performance Measures

Airport performance measures were developed for the functional roles. These objectives were developed in cooperation with ODA and the state aviation system plan and master plan Advisory Committee. The purpose of the performance measures is to compare existing airport facilities to the minimum and desired facility criteria for each functional role. The performance measures should not be considered a requirement for development standards and any development would require additional support and justification through the airport master planning process as well as environmental documentation.

The performance measures for each functional role are defined below. Many airports have multiple runways; therefore, the primary runway for each airport was used to evaluate the facility against the performance measures.

Category I – Commercial Service Airports

These airports support some level of scheduled commercial airline service in addition to a full range of general aviation aircraft. This includes both domestic and international destinations.

Performance criteria were evaluated by analyzing each airport's primary runway. A complete description of airport facilities is located below.

<u>Airside Facilities</u>	<u>Minimum Criteria</u>	<u>Desired Criteria</u>
FAA - ARC	C-II	Varies
NPIAS	Yes	Yes
Based Aircraft	Not an Objective	Not an Objective
Runway Orientation	Varies by Airport	Varies by Airport
Runway Length	6,000 feet	Varies by Aircraft
Runway Width	100 feet	Varies by Aircraft
Runway Pavement Type	Bituminous, Concrete	Bituminous, Concrete
Runway Pavement Strength	Varies by Airport	Varies by Airport
Runway Pavement PCI	Varies by Airport	Varies by Airport
Taxiways	Full Parallel	Full Parallel/High Speed Exits
Approach Type	Precision	Precision
Visual Approach Aids	Both Runway Ends	Both Runway Ends
Instrument Approach Aids	One Runway End	Both Runway Ends
Runway Lighting	MIRL/HIRL	MIRL/HIRL
Taxiway Lighting	MITL/HITL	MITL/HIT
<u>General Facilities</u>	<u>Minimum Criteria</u>	<u>Desired Criteria</u>
Rotating Beacon	Yes	Yes
Lighted Wind Indicator	Yes	Yes
Weather Reporting	AWOS/ASOS	AWOS/ASOS
Hangared Aircraft Storage	75% of Based Aircraft	100% of Based Aircraft
Apron Parking/Storage	75% of Daily Transient	100% of Daily Transient
Terminal Building	Yes	Yes, Gates and Covered Walkways
Auto Parking	Moderate	Adequate
Fencing	Perimeter	Perimeter
Cargo	Small Handling Facility w/ Apron	Handling Facility w/ Apron
Deicing Facility	Yes	Yes, 24 hour
<u>Services</u>	<u>Minimum Criteria</u>	<u>Desired Criteria</u>
Fuel	100 LL & Jet A	100 LL & Jet A, 24 hour service
FBO	Full Service, 24 hour service	Full Service, 24 hour service
Ground Transportation	Rental Car, Taxi, or Other	Rental Car, Taxi, or Other
Food Service	Coffee Shop/Deli & Cold Foods	Restaurant
Restrooms	Yes	Yes
Pilot Lounge	Yes w/ Weather Reporting Station	Yes w/ Weather Reporting Station
Snow Removal	Yes	Yes
Telephone	Yes	Yes

Category II – Urban General Aviation

These airports support all general aviation aircraft and accommodate corporate aviation activity, including business jets, helicopters, and other general aviation activity. These airports' primary users are business related and service a large geographic region or they experience high levels of general aviation activity.

Performance criteria were evaluated by analyzing each airport's primary runway. A complete description of airport facilities is located below.

<u>Airside Facilities</u>	<u>Minimum Criteria</u>	<u>Desired Criteria</u>
FAA - ARC	C-II	Varies
NPIAS	Yes	Yes
Based Aircraft	Not an Objective	Not an Objective
Runway Orientation	Varies by Airport	Varies by Airport
Runway Length	5,000 feet	Varies by Aircraft
Runway Width	100 feet	Varies by Aircraft
Runway Pavement Type	Bituminous, Concrete	Bituminous, Concrete
Runway Pavement Strength	Varies by Airport	Varies by Airport
Runway Pavement PCI	Varies by Airport	Varies by Airport
Taxiways	Full Parallel	Full Parallel/High Speed Exit
Approach Type	Precision	Precision
Visual Approach Aids	One Runway End	Both Runway Ends
Instrument Approach Aids	Not an Objective	One Runway End
Runway Lighting	MIRL/HIRL	MIRL/HIRL
Taxiway Lighting	MITL/HITL	MITL/HITL
<u>General Facilities</u>	<u>Minimum Criteria</u>	<u>Desired Criteria</u>
Rotating Beacon	Yes	Yes
Lighted Wind Indicator	Yes	Yes
Weather Reporting	AWOS/ASOS	AWOS/ASOS
Hangared Aircraft Storage	75% of Based Aircraft	100% of Based Aircraft
Apron Parking/Storage	75% of Daily Transient	100% of Daily Transient
Terminal Building	Yes	Yes
Auto Parking	Moderate	Adequate
Fencing	Perimeter	Perimeter
Cargo	Designated Apron Area	Small Handling Facility w/ Apron
Deicing Facility	Not an Objective	Yes
<u>Services</u>	<u>Minimum Criteria</u>	<u>Desired Criteria</u>
Fuel	100 LL & Jet A	100 LL & Jet A, 24 hour service
FBO	Full Service	Full Service, 24 hour service
Ground Transportation	Offsite Rental Car, Taxi, or Other	Rental Car, Taxi, or Other
Food Service	Vending	Coffee Shop/Deli & Cold Foods
Restrooms	Yes	Yes
Pilot Lounge	Yes w/ Weather Reporting Station	Yes w/ Weather Reporting Station
Snow Removal	Yes	Yes
Telephone	Yes	Yes

Category III – Regional General Aviation

These airports support most twin- and single-engine aircraft and may also accommodate occasional business jets. These airports support a regional transportation need.

Performance criteria were evaluated by analyzing each airport's primary runway. A complete description of airport facilities is located below.

<u>Airside Facilities</u>	<u>Minimum Criteria</u>	<u>Desired Criteria</u>
FAA - ARC	B-II	Varies
NPIAS	Not an Objective	Not an Objective
Based Aircraft	Not an Objective	Not an Objective
Runway Orientation	Varies by Airport	Varies by Airport
Runway Length	4,000 feet	Varies by Aircraft
Runway Width	75 feet	Varies by Aircraft
Runway Pavement Type	Bituminous, Concrete	Bituminous, Concrete
Runway Pavement Strength	Varies by Airport	Varies by Airport
Runway Pavement PCI	Varies by Airport	Varies by Airport
Taxiways	Partial or Turnarounds	Full Parallel
Approach Type	Non-Precision	Precision
Visual Approach Aids	One Runway End	Both Runway Ends
Instrument Approach Aids	Not an Objective	Not an Objective
Runway Lighting	MIRL	MIRL/HIRL
Taxiway Lighting	MITL	MITL/HITL
<u>General Facilities</u>	<u>Minimum Criteria</u>	<u>Desired Criteria</u>
Rotating Beacon	Yes	Yes
Lighted Wind Indicator	Yes	Yes
Weather Reporting	AWOS/ASOS	AWOS/ASOS
Hangared Aircraft Storage	75% of Based Aircraft	100% of Based Aircraft
Apron Parking/Storage	30% of Daily Transient	50% of Daily Transient
Terminal Building	Small Meeting Area	Yes
Auto Parking	Minimal	Moderate
Fencing	Terminal Area	Perimeter
Cargo	Space on Existing Apron	Designated Apron Area
Deicing Facility	Not an Objective	Not an Objective
<u>Services</u>	<u>Minimum Criteria</u>	<u>Desired Criteria</u>
Fuel	100 LL & Jet A	100 LL & Jet A, 24 hour service
FBO	Full Service	Full Service, 24 hour service
Ground Transportation	Courtesy Car / Offsite Rental Car	Rental Car, Taxi, or Other
Food Service	Vending	Vending
Restrooms	Yes	Yes
Pilot Lounge	Yes w/ Weather Reporting Station	Yes w/ Weather Reporting Station
Snow Removal	Yes	Yes
Telephone	Yes	Yes

Category IV – Local General Aviation Airport

These airports support primarily single-engine general aviation aircraft but are capable of accommodating smaller twin-engine general aviation aircraft. These airports support local air transportation needs and special use aviation activities.

Performance criteria were evaluated by analyzing each airport's primary runway. A complete description of airport facilities is located below.

<u>Airside Facilities</u>	<u>Minimum Criteria</u>	<u>Desired Criteria</u>
FAA - ARC	B-I	B-II
NPIAS	Not an Objective	Not an Objective
Based Aircraft	Not an Objective	Not an Objective
Runway Orientation	Varies by Airport	Varies by Airport
Runway Length	3,000 feet Paved; 2,500 feet Turf	Varies by Aircraft
Runway Width	60 feet Paved; 120 feet Turf	Varies by Aircraft
Runway Pavement Type	Bituminous, Concrete, Turf	Bituminous, Concrete
Runway Pavement Strength	Varies by Airport	Varies by Airport
Runway Pavement PCI	Varies by Airport	Varies by Airport
Taxiways	Exits Needed	Partial or Turnarounds
Approach Type	Visual	Non-Precision
Visual Approach Aids	Not an Objective	One Runway End
Instrument Approach Aids	Not an Objective	Not an Objective
Runway Lighting	LIRL	MIRL
Taxiway Lighting	LITL	MITL
<u>General Facilities</u>	<u>Minimum Criteria</u>	<u>Desired Criteria</u>
Rotating Beacon	Yes	Yes
Lighted Wind Indicator	Yes	Yes
Weather Reporting	Not an Objective	AWOS/ASOS
Hangared Aircraft Storage	75% of Based Aircraft	100% of Based Aircraft
Apron Parking/Storage	30% of Daily Transient	50% of Daily Transient
Terminal Building	Not an Objective	Small Meeting Area
Auto Parking	Minimal	Minimal
Fencing	Not an Objective	Terminal Area
Cargo	Not an Objective	Not an Objective
Deicing Facility	Not an Objective	Not an Objective
<u>Services</u>	<u>Minimum Criteria</u>	<u>Desired Criteria</u>
Fuel	100 LL	100 LL & Jet A
FBO	Not an Objective	Limited
Ground Transportation	Not an Objective	Courtesy Car/Offsite Rental Car
Food Service	Not an Objective	Vending
Restrooms	Yes	Yes
Pilot Lounge	Not an Objective	Yes w/ Weather Reporting Station
Snow Removal	Yes	Yes
Telephone	Not an Objective	Yes

Category V – RAES (Remote Access/Emergency Services)

These airports support primarily single-engine general aviation aircraft, special use aviation activities, access to remote areas, or provide emergency service access.

Performance criteria were evaluated by analyzing each airport's primary runway. A complete description of airport facilities is located below.

<u>Airside Facilities</u>	<u>Minimum Criteria</u>	<u>Desired Criteria</u>
FAA - ARC	A-I	B-I
NPIAS	Not an Objective	Not an Objective
Based Aircraft	Not an Objective	Not an Objective
Runway Orientation	Varies by Airport	Varies by Airport
Runway Length	2,500 feet Turf	3,000 feet Paved; 2,500 feet Turf
Runway Width	60 feet Turf	60 feet Paved; 120 feet Turf
Runway Pavement Type	Turf, Gravel	Bituminous, Concrete
Runway Pavement Strength	Varies by Airport	Varies by Airport
Runway Pavement PCI	Varies by Airport	Varies by Airport
Taxiways	Not an Objective	Exits Needed to an apron
Approach Type	Visual	NPIA
Visual Approach Aids	Not an Objective	One Runway End
Instrument Approach Aids	Not an Objective	One Runway End
Runway Lighting	Not an Objective	LIRL
Taxiway Lighting	Not an Objective	LITL
<u>General Facilities</u>	<u>Minimum Criteria</u>	<u>Desired Criteria</u>
Rotating Beacon	Not an Objective	Yes
Lighted Wind Indicator	Not an Objective	Yes
Weather Reporting	Not an Objective	AWOS/ASOS
Hangared Aircraft Storage	Not an Objective	75% of Based Aircraft
Apron Parking/Storage	Not an Objective	100 X 100 foot Apron
Terminal Building	Not an Objective	Small Meeting Area
Auto Parking	Not an Objective	Minimal
Fencing	Not an Objective	Limited
Cargo	Not an Objective	Not an Objective
Deicing Facility	Not an Objective	Not an Objective
<u>Services</u>	<u>Minimum Criteria</u>	<u>Desired Criteria</u>
Fuel	Not an Objective	100 LL
FBO	Not an Objective	Not an Objective
Ground Transportation	Not an Objective	On-Call Service
Food Service	Not an Objective	Not an Objective
Restrooms	Not an Objective	Yes
Pilot Lounge	Not an Objective	Yes
Snow Removal	Not an Objective	Yes
Telephone	Not an Objective	Yes

Table 2.2 OAP 2007 Recommended Airport Classification

<u>Category I – Commercial Service Airports</u>	<u>Category IV – (Continued)</u>
Eastern Oregon Regional Airport at Pendleton	Lexington Airport
Eugene Airport - Mahlon Sweet Field	Madras/City-County Airport
Klamath Falls International Airport	Myrtle Creek Municipal Airport
Portland International Airport	Portland - Mulino Airport
Redmond Municipal Airport - Roberts Field	Prineville Airport
Rogue Valley International - Medford Airport	Seaside Municipal Airport
Salem McNary Field	Siletz Bay State Airport
Southwest Oregon Regional Airport	Sisters Eagle Air Airport
	Sportsman Airpark
	Sunriver Airport
	Wasco State Airport
<u>Category II – Urban General Aviation Airports</u>	<u>Category V – Remote Access/Emergency Service Airports</u>
Astoria Regional Airport	Alkali Lake State
Aurora State Airport	Arlington Municipal
Bend Municipal Airport	Beaver Marsh
Corvallis Municipal Airport	Cape Blanco State Airport
McMinnville Municipal Airport	Cascade Locks State Airport
Newport Municipal Airport	Chiloquin State Airport
Portland Downtown Heliport	Country Squire Airpark
Portland - Hillsboro Airport	Crescent Lake State Airport
Portland - Troutdale Airport	Davis Field
Scappoose Industrial Airpark	Enterprise Municipal
	George Felt
<u>Category III – Regional General Aviation Airports</u>	Lake Billy Chinook
Ashland Municipal Airport - Sumner Parker Field	Lake Woahink Seaplane Base - <i>Closed</i>
Baker City Municipal Airport	Lakeside Municipal Airport
Bandon State Airport	Malin
Burns Municipal Airport	McDermitt State Airport
Columbia Gorge Regional - The Dalles	McKenzie Bridge State
Grant County Regional Airport	Memaloose (USFS)
Grants Pass Airport	Miller Memorial Airpark
Hermiston Municipal Airport	Monument Municipal
La Grande / Union County Airport	Nehalem Bay State Airport
Lake County Airport	Oakridge State
Ontario Municipal Airport	Owyhee Reservoir State
Roseburg Regional Airport	Pacific City State Airport
Tillamook Airport	Paisley
	Pinehurst State Airport
<u>Category IV – Local General Aviation Airports</u>	Powers Hayes Field
Albany Municipal Airport	Prospect State Airport
Boardman Airport	Rome State
Brookings Airport	Sandy River
Chehalem Airpark	Santiam Junction State
Christmas Valley Airport	Silver Lake Strip (USFS)
Condon State Airport - Pauling Field	Skyport Airport
Cottage Grove State Airport - Jim Wright Field	Stark's Twin Oaks Airpark
Creswell Hobby Field Airport	Toketee State
Florence Municipal Airport	Toledo State Airport
Gold Beach Municipal Airport	Valley View
Illinois Valley Airport	Vernonia Municipal Airport
Independence State Airport	Wakonda Beach State
Joseph State Airport	
Ken Jernstedt Airfield	
Lebanon State Airport	
Lenhardt Airpark	

Source: Mead & Hunt, Inc.

2.5 Summary

Each of these study efforts will provide valuable information to the state as well as the individual airports as stand alone documents. Combined together, these studies provide a comprehensive resource for airport development throughout the entire state.

Chapter 3

As outlined in the Federal Aviation Administration (FAA) Advisory Circular 150/5070-7, *The Airport System Planning Process*, the process of system planning for aviation is based upon the collection and evaluation of information about each airport within the overall system and the area they serve. The inventory task is accomplished through physical inspection of the facilities, field interviews and surveys, telephone conversations, and review of previous studies.

The objective of the inventory task is to document existing conditions, thereby providing the background information essential to the development and recommendations for the *Oregon Aviation Plan 2007 (OAP 2007)*. The inventory information covers a broad spectrum and includes information on the following elements of the Airport:

- Airside and landside facilities and their uses
- Navigational aids
- Auxiliary support facilities and services
- Environmental observations
- Air traffic activity data
- Survey analyses

A large volume of data was collected, reviewed, and analyzed during the inventory effort. This chapter presents an overall summary of this information and is organized in the following sections:

- 3.1 General Airport Description and Location
- 3.2 Existing Airport Facilities
- 3.3 Current and Forecast Demand
- 3.4 Survey Responses

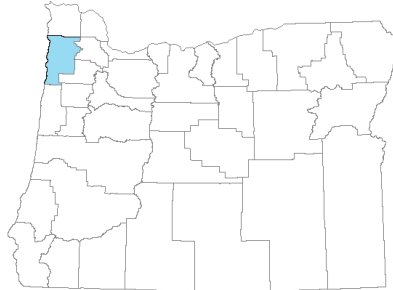
3.1 General Airport Description and Location

Newport Municipal Airport is located three miles south of the city of Newport, within Lincoln County (**Figure 3.1**). The city of Newport is located in northern coastal Oregon and is 50 miles north of Florence and 90 miles southwest of Salem. Lincoln County is bounded by Tillamook County to the north, Polk and Benton Counties to the east, Lane County to the south, and the Pacific Ocean to the west. Access to the Airport is provided by US Route 101 which serves as a critical transportation link from coastal Oregon to the rest of the state.

According to the State of Oregon Office of Economic Analysis, Lincoln County contained 45,994 residents in 2005, up 3.4 percent from 44,479 in 2000. Oregon has grown from 3,436,750

residents in 2000 to 3,618,200 residents in 2005, up 5.3 percent. This indicates that Lincoln County is growing at a slower pace than the state as a whole.

Figure 2.1
Lincoln County Location Map



The Airport is owned and operated by the city of Newport and is included in the National Plan of Integrated Airport Systems (NPIAS), making this airport eligible for federal funding. Newport Municipal Airport, designated by the airport code ONP, occupies approximately 700 acres of land.

3.2 Existing Airport Facilities

Existing airport facilities are presented in three categories: airside, landside, and support facilities. The airside facilities include such areas as the runways, taxiways, aprons, aircraft parking and storage areas, airfield lighting, and navigational aids. The landside facilities include items such as the airport terminal building, vehicular access, auto parking, and support facilities. The support facilities may include fuel facilities, aircraft rescue and firefighting (ARFF) facilities, airport maintenance, snow removal equipment (SRE) and facilities, and utilities. The existing airside, landside, and support facilities are detailed below.

3.2.a Airside Facilities

The airfield consists of many components that are required to accommodate safe aircraft operations. This consists of runways, taxiways, and an apron network; the visual and electronic navigational aids associated with runways; runway protection zones; and general aviation facilities.

Runways. Newport Municipal Airport has two intersecting runways. The primary runway, Runway 16-34, is 5,698 feet long and 150 feet wide. The secondary runway, Runway 02-20, is 3,001 feet long and 75 feet wide. Both runways have a bituminous surface. The Airport currently has an Airport Reference Code (ARC) of B-II. Additional runway information such as pavement strength and condition are located in **Section 4.2, Definition of Airport System Role.**

Taxiways. The existing taxiway system at the Airport consists of parallel, connecting, access, and entrance/exit taxiways. Runway 16-34 has a partial parallel taxiway with a length of 3,020

feet. There is also a connecting taxiway which extends from the apron area to the end of Runway 34. In addition, a connecting taxiway is located approximately 2,000 feet from the end of Runway 16 and extends perpendicular from Runway 16-34 to Runway 02-20.

Aprons. There are three apron areas at the Airport located south of Runway 02. The northern apron is approximately 190,000 square feet, with a bituminous surface, and provides parking for ten aircraft. The central apron is approximately 14,700 square feet, with a bituminous surface, and provides parking for eight aircraft. The southern apron, owned by the United States Coast Guard is approximately 24,000 square feet and has a concrete surface.

Lighting and Navigational Aids. The Airport lighting and navigational systems extend the Airport's usefulness into night and/or poor visibility conditions.

Pavement edge lighting consists of light fixtures located near the edge of the runway/taxiway to define the lateral limits of the pavement. This lighting is essential for the safe and efficient movement of aircraft during periods of darkness or poor visibility. Runway 16-34 is equipped with high intensity runway lighting (HIRL) and Runway 02-20 is equipped with medium intensity runway lighting (MIRL). All taxiways at the Airport are equipped reflectors.

Runway end identifier lights (REILs) consist of two synchronized flashing lights located near the runway threshold which provide rapid and positive identification of the approach end of a runway. REILs help pilots identify the end of a runway especially when other light sources obscure other runway lighting. REILs are installed on the end of Runway 34.

A four-light precision approach path indicator (PAPI) is installed on the approach end of Runway 34. A PAPI is a system of either two or four identical light units that provide pilots with either red, white, or a combination of red/white lights which indicate whether a pilot is below, above, or on the glide path to the runway.

A four-light visual approach slope indicator (VASI) is installed on the approach ends of Runway 16. A VASI system provides the pilot with a red, red/white, or white signal that indicates if the pilot is below, above, or on the glide path to the runway.

The Airport also provides navigational systems which provide the pilots of properly equipped aircraft with point-to-point guidance and position information. The systems available to pilots using the Airport include the very high frequency omnidirectional range (VOR) facility, nondirectional beacon (NDB), Instrument Landing System (ILS), and global positioning system (GPS).

The approach end of Runway 16 is equipped with a Medium Intensity Approach Lighting System with Runway Alignment Indicator Lights (MALSR). The MALSR consists of a medium intensity approach lighting system (MAL) and runway alignment indicator lights (RAIL). The MAL portion consists of a threshold bar and nine other five-light bars; the RAIL portion consists of five

sequenced flashers. The RAIL lights flash in sequence toward the runway threshold at the rate of twice per second, providing visual guidance to landing aircraft.

The VOR provides azimuth readings to pilots of properly equipped aircraft by transmitting a radio signal at every degree to provide 360 individual navigational courses. Frequently, distance measuring equipment (DME) is combined with a VOR facility (VOR/DME) to provide distance, as well as direction information to the pilot. In addition, military TACAN and civil VORs are commonly combined to form a VORTAC. A VORTAC provides distance and direction information to civil and military pilots. A VOR/DME approach has been established to both ends of Runway 16-34.

The NDB transmits nondirectional radio signals whereby the pilot of properly equipped aircraft can determine the bearing to or from the NDB facility and then track to or from the station. GPS uses satellites placed in orbit around the earth to transmit electronic signals, which properly equipped aircraft use to determine altitude, speed, and position information. GPS allows pilots to navigate to any airport in the country, and they are not required to navigate using a specific navigational facility.

At Newport Municipal Airport there are six published instrument approaches which utilize the navigational aids noted above. The instrument approaches include:

- ILS approach to Runway 16
- GPS approach to Runway 16
- GPS approach to Runway 34
- VOR/DME approach to Runway 16
- VOR/DME approach to Runway 34
- VOR-A to the entire Airport with a circling approach

Approaches to Runway 16 are considered precision approaches, which provide vertical descent information as well as course guidance information due to the ILS.

In addition to lighting and navigational aids, the Airport is also equipped with an automated weather observation system (AWOS). The AWOS provides automated aviation weather observations 24-hours a day. This system updates weather observations every minute, continually reporting significant weather changes as they occur. This system also reports cloud ceiling, visibility, temperature, dew point, wind direction, wind speed, altimeter setting, and density altitude (airfield elevation corrected for temperature).

The Airport also has a wind indicator.

3.2.b Landside Facilities

General Aviation Facilities. General aviation services at the Airport are provided by one fixed based operator (FBO): Newport Municipal Airport Central Oregon Coast Air Services (COCAS). COCAS provides numerous services, including aircraft maintenance, aircraft parking (ramp and tie-down), hangar rental, rental car and hotel reservations, catering, aircraft rental, flight instruction, scenic flights, photography flights, pilot supplies, and fueling.

Hangar space at the Airport is comprised of box hangars, and open and enclosed T-Hangars. There are approximately 19 hangar facilities at the Airport.

3.2.c Support Facilities

Parking. The Airport has moderate automobile parking.

Fuel Facilities. The Airport has 100 LL and Jet A fuel provided by COCAS.

Newport Municipal Airport



Source: City of Newport

3.3 Current and Forecast Demand

This element of the report provides projections of future aviation demand at the Airport. Projections of short-, intermediate-, and long-term activity at the Airport are based on 5-, 10-, and 20-year milestones, using 2005 as the base year of analysis as it is the most recent year for which a full year of activity data is currently available.

Projections of aviation demand are an important element of the system planning process as they provide the basis for several key analyses, including:

- Determining the role of the Airport with respect to the type of aircraft to be accommodated in the future
- Evaluating the capacity of existing airport facilities and their ability to accommodate projected aviation demand
- Estimating the extent of airside and landside improvements required in future years to accommodate projected demand

This analysis uses the most recent aircraft activity available to project future levels of aviation demand through the year 2025. The forecast analysis contained in this section includes methodologies based on historical aviation trends at the Airport, as well as other socioeconomic trends related to the state of Oregon. National projections of aviation activity developed by the FAA were also reviewed within the context of this forecast analysis, where available.

This section provides discussions of the methodologies and findings used for projecting passenger enplanements, aircraft operations, and based aircraft at the Airport. The projections of aviation demand are documented below in **Table 3.1**.

3.3.a Forecasting Approach

There are a number of different forecasting techniques available for use in the projection of aviation activity, ranging from subjective judgment to sophisticated mathematical modeling. Due to the fact that a large number of variables affect a facility plan, it is important that each variable be considered in the context of its use in the plan. For variables that significantly affect the nature and extent of facilities, redundancy has been achieved through the utilization of several forecasting techniques so as to minimize the uncertainty associated with the range of the forecast variable.

The analysis includes the assessment of historical trends on aviation activity data at the local, regional, and national level. Aviation activity statistics on such items as passenger enplanements, aircraft operations, and based aircraft are collected, reviewed, and analyzed. Similarly, socioeconomic factors such as population and income are analyzed for the effect they may have on aviation growth. The comparison of relationships among these various indicators provides the initial step in the development of realistic forecasts of aviation demand.

The following general methodologies were used in projecting various components of aviation demand at the Airport.

Time Series Methodology. Historical trend lines and linear extrapolation are some of the most widely used methods for forecasting. These techniques utilize time-series types of data and are most useful for a pattern of demand that demonstrates a historical relationship with time. In

utilizing this technique, an assumption is made that the same factors that have influenced demand will continue to affect future demand. While this is a rather broad assumption, it often provides a reliable benchmark for comparing the results of other analyses. Linear extrapolation established a linear trend by fitting a straight line using the least squares method to known historical data. Historic trend lines, as utilized in these analyses, examine historic compounded annual growth rates and extrapolate future data values by assuming a similar compounded annual growth rate in the future.

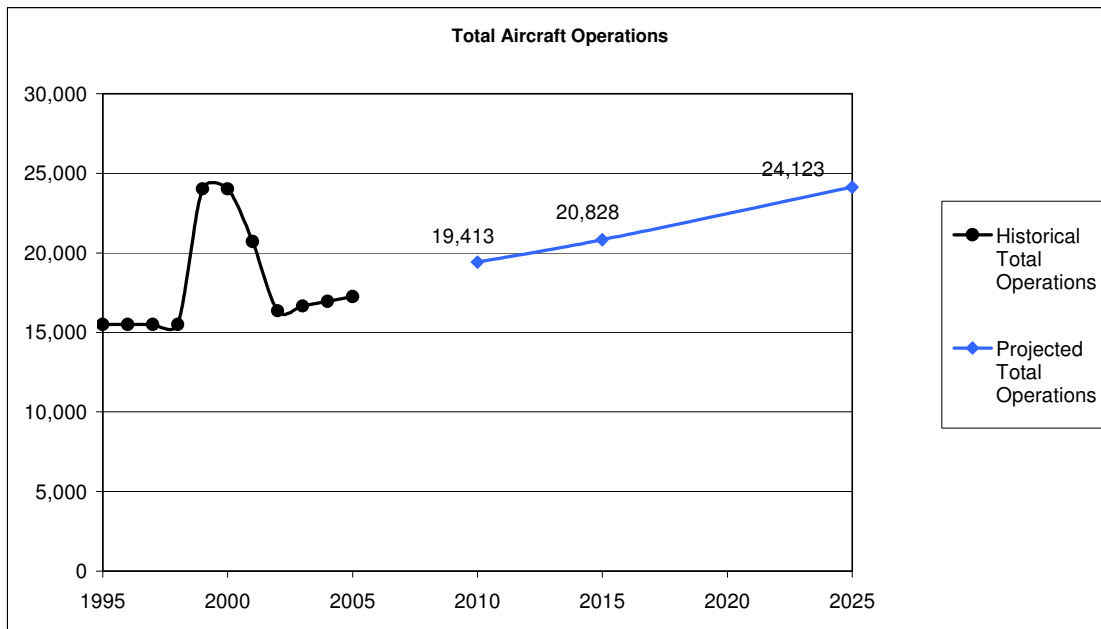
Market Share Methodology. Market share, ratio, or top-down models are utilized to scale large-scale aviation activity down to a local level. Inherent to the use of such a method is the demonstration that the proportion of the large-scale activity that can be assigned to the local level is a regular and predictable quantity. This method has been used extensively in the aviation industry for aviation demand forecasting at the local level. Its most common use is in the determination of the share of total national traffic activity that will be captured by a particular region or airport. Historical data is examined to determine the ration of local airport traffic to total national traffic. From outside data sources, in this case the FAA, projected levels of national activity are determined and then proportioned to the Airport based upon the observed and projected trends.

Socioeconomic Methodology. Socioeconomic or correlation analysis examines the direct relationship between two or more sets of historical data. In this case, socioeconomic analyses have been performed, relating historical aviation activity to historical population levels within the Airport region. Based upon the observed and projected correlation between historical aviation activity and the socioeconomic data sets, future aviation activity projections are developed based upon the projected socioeconomic data sets. In this case, projected population levels were obtained from Woods & Poole Economics, Inc. (W&P), an independent firm that specializes in long-term economic and demographic projections. This forecasting methodology is subject to how accurately an airport's activity reflects local demographic makeup.

Table 3.1 Summary of Aviation Projections

Newport Municipal Airport (ONP)

Year	Enplanements	Operations			Total	Based Aircraft
		Commercial Air Carrier	General Aviation	Military		
Historical:						
1995	0	1,300	11,200	3,000	15,500	25
1996	0	1,300	11,200	3,000	15,500	25
1997	0	1,300	11,200	3,000	15,500	26
1998	788	1,300	11,200	3,000	15,500	26
1999	2,618	2,002	19,025	3,000	24,027	27
2000	1,388	2,002	19,025	3,000	24,027	27
2001	238	3,413	13,907	3,400	20,720	25
2002	238	970	13,329	2,060	16,359	24
2003	238	988	13,610	2,060	16,658	24
2004	0	1,006	13,888	2,060	16,954	30
2005	238	1,025	14,171	2,060	17,256	30
Projected:						
2010	238	910	16,443	2,060	19,413	33
2015	238	808	17,959	2,060	20,828	35
2025	238	637	21,425	2,060	24,123	39
<i>CAGR (2005-2025)</i>	0.00%	-2.35%	2.09%	0.00%	1.69%	1.27%



Source: Historical Enplanements, Operations - FAA Terminal Area Forecast System (TAF)
 Historical Based Aircraft - FAA Terminal Area Forecast System (TAF)
 Projections - Mead & Hunt, Inc.

3.4 Survey Responses

As previously discussed, surveys were a critical part of the data collection effort. Below is a summary of the surveys and staff interviews that provide the context that surrounds the *OAP 2007*. Surveys were sent to state, local, and county government officials, businesses, airport managers, pilots, chamber of commerce members, and host communities to solicit input of the state aviation system from diverse interests groups.

3.4.a Community Information

Currently, tourism is noted as the primary industry in the Newport area. The Airport is perceived by survey respondents to be a valuable economic asset to the community. If there was no longer an airport available, respondents believe the public would use the next closest airport or move to a new location. Airport expansion was noted as the main citizen concern.

3.4.b Economic Development

The importance of aviation for growth from an economic perspective is ranked high in survey results. Respondents noted that airport upgrades would increase economic growth for the surrounding communities. It was identified that the most important item that Newport Municipal Airport could do to promote economic growth is to add commercial service. Respondents also perceived that the impact to the economy would be negative if the Airport was no longer available. Businesses would substitute with other transportation modes. Respondents were unsure if the city of Newport and Lincoln County would be supportive of a funding mechanism to finance future airport developments.

3.4.c Airport Development and Use

The airport users for Newport Municipal Airport are recreation, tourism, out-of-town business, and local business. Surrounding communities rely on the Airport for delivery of mail/cargo.

There are perceived operational limitations which include:

- Terminal amenities
- Availability of fuel

3.4.d Air Shuttle

Upon the request of ODA, the feasibility of a state operated and subsidized air shuttle service is being investigated. This air shuttle service would link various communities within the state. Traditionally, air shuttle services do not compete with regular commercial service, their intent is to commute between smaller local communities instead of large regional airports; therefore, they are

viewed as a supplement to air service for airports. The air shuttle concept is not intended to compete with scheduled air service.

Survey respondents noted that some form of an air shuttle service would fulfill a community need and would likely promote economic growth for communities. Businesses, health services, higher education, government services, and transportation of cargo are a few of the segments that may benefit from the air shuttle service. The order of importance of issues for travelers is listed in survey results as schedule, reliability, cost, comfort, and type of aircraft. Three of the destinations within the state that users are expected to want to travel to include Portland, Eugene, and Redmond. Providing service on a daily basis is desired, with a preferred arrival time at the destination of 8:00 a.m. and a desired departure time from the destination of 8:00 p.m. The city of Newport and Lincoln County would be willing to “guarantee” seats for their community on the air shuttle service. If they were to invest in the air shuttle service, they would be willing to spend between \$0 and \$100 and would expect users to pay between \$101 and \$150 per seat, with a potential of 16 and 20 users per flight.

3.5 Summary

Providing a comprehensive summary of the existing airport facility is an essential part of the planning process. The information contained in this chapter provides the foundation for the recommendations found in *Chapter Four*.

Chapter 4

As discussed, the inventory and forecasts provide a basis from which recommendations can be made for future development. The recommendations illustrated within the *Oregon Aviation Plan 2007 (OAP 2007)* reflect the Oregon Department of Aviation's (ODA) desire to create a comprehensive aviation system that adequately services the aviation needs of the state and the various interest groups associated with this resource. This chapter is organized in the following sections:

- 4.1 Airport Facility and Service Needs
- 4.2 Definition of Airport System Role
- 4.3 Economic Impact Analysis

4.1 Airport Facility and Service Needs

A primary focus of this report is to identify and evaluate airside, landside, and other general facility needs and deficiencies at the Airport utilizing information collected through the physical inspection of the facility, field interviews and surveys, telephone conversations, review of previous studies, and review of appropriate airport records. The following section presents the recommended airport facility and service needs identified during the study process.

4.1.b General Observations and Recommendations

The Newport Municipal Airport has been classified as a *Category II – Urban General Aviation* airport and should provide appropriate facilities and services commensurate with its system role. The existing airport facilities were compared to the minimum and desired criteria for a Category II airport which identified the following airport facility and service needs:

- Construct full parallel taxiway to Runway 16/34
- Install medium intensity taxiway lighting
- Expand aircraft apron
- Construct hangars

4.1.c Airport Capital Improvement Program

The Airport Capital Improvement Program (ACIP) is the primary planning tool the FAA utilizes to identify, prioritize, and assign funds to capital airport development and associated capital needs for all NPIAS airports. The 2006 ACIP for Newport Municipal Airport includes the following projects:

- Acquire land for approach protection
- Construct building
- Acquire aircraft rescue and fire fighting vehicle
- Rehabilitate taxiway

4.1.d Other Potential Improvements for Consideration

No other airport improvement projects were being considered at the time of publication.

4.2 Definition of Airport System Role

Category II – Urban General Aviation

These airports support all general aviation aircraft and accommodate corporate aviation activity, including business jets, helicopters, and other general aviation activity. These airports' primary users are business related and service a large geographic region or they experience high levels of general aviation activity.

Performance criteria were evaluated by analyzing each airport's primary runway. A complete description of airport facilities is located in **Section 3.2, Existing Airport Facilities**.

<u>Airside Facilities</u>	<u>Existing Facilities</u>	<u>Minimum Criteria</u>	<u>Desired Criteria</u>
FAA - ARC	B-II	C-II	Varies
NPIAS	Yes	Yes	Yes
Based Aircraft	397	Not an Objective	Not an Objective
Runway Orientation	17/35	Not an Objective	Not an Objective
Runway Length	5,004 feet	5,000 feet	Varies by Aircraft
Runway Width	100 feet	100 feet	Varies by Aircraft
Runway Pavement Type	Bituminous	Bituminous, Concrete	Bituminous, Concrete
Runway Strength	30,000 (SW)	Not an Objective	Not an Objective
Runway Pavement PCI	84	Not an Objective	Not an Objective
Taxiways	Full Parallel	Full Parallel	Full Parallel/High Speed Exit
Approach Type	Non - Precision	Precision	Precision
Visual Approach Aids	V4R (17) V4L (35)	One Runway End	Both Runway Ends
Instrument Approach Aids	ODALS, LOC (17) GPS (17/35)	Not an Objective	One Runway End
Runway Lighting	MIRL	MIRL/HIRL	MIRL/HIRL
Taxiway Lighting	Reflectors	MITL/HITL	MITL/HITL
<u>General Facilities</u>	<u>Existing Facilities</u>	<u>Minimum Criteria</u>	<u>Desired Criteria</u>
Rotating Beacon	Yes	Yes	Yes
Lighted Wind Indicator	Yes	Yes	Yes
Weather Reporting	ASOS	AWOS/ASOS	AWOS/ASOS
Hangared Aircraft Storage	275	75% of Based Aircraft	100% of Based Aircraft
Apron Parking/Storage	70	75% of Daily Transient	100% of Daily Transient
Terminal Building	Yes	Yes	Yes
Auto Parking	Moderate	Moderate	Adequate
Fencing	Perimeter	Perimeter	Perimeter
Cargo	Non-Designated Apron	Designated Apron Area	Small Handling Facility w/ Apron
Deicing Facility	No	Not an Objective	Yes
<u>Services</u>	<u>Existing Facilities</u>	<u>Minimum Criteria</u>	<u>Desired Criteria</u>
Fuel	100 LL & Jet A	100 LL & Jet A	100 LL & Jet A, 24-hour service
FBO	Full Service (3)	Full Service	Full Service, 24-hour service
Ground Transportation	Rental Car, Taxi	Offsite Rental Car, Taxi	Rental Car, Taxi, or Other
Food Service	Vending, Coffee Shop	Vending	Coffee Shop/Deli & Cold Foods
Restrooms	Yes	Yes	Yes
Pilot Lounge	Yes w/Weather Reporting	Yes w/ Weather Reporting	Yes w/ Weather Reporting
Snow Removal	Yes	Yes	Yes
Telephone	Yes	Yes	Yes

4.3 Economic Impact Analysis

The economic impact analysis of airports in Oregon was developed for each airport, measuring economic impacts of airport facilities, within regions and throughout the state. Airports that are part of the Port of Portland were not part of this study, except for the regional-based analysis of aviation dependent businesses. This study used the five regions of *ConnectOregon* to measure local/regional economic impacts of airports and for dependent non-aviation businesses. The regions are shown by the accompanying map.

Total economic impacts are the sum of on-airport economic activities, off-airport spending by visitors who arrive by air, and spin-off impacts (multiplier effect). Airport impacts are provided by region and state to show the contribution of each airport to the regional and state economies. In addition, aviation dependent impacts are provided by region to show the importance of airports in each region to non-aviation businesses. All impacts reported represent a base year of 2005. Each type of impact is defined in the following paragraphs.

On-Airport direct impacts represent economic activities that occur on airport grounds. By separating aviation related activities from non-aviation activities, The *OAP 2007* illustrates the regional economic contribution of aviation by airport in the regional and state economies, as well as the overall impact of each airport as a facility. Aviation related activities are those that would not occur without the airport, such as airlines, fixed base operators (FBO), government, and other tenants located at the airport or directly dependent on the airport. This category also includes airport management and other individuals employed directly by the airport, as well as retail and service operations for passengers, pilots, and other airport employees. In some cases, airports provide land or building space for companies that are not affiliated with aviation. These tenants are not related to the aviation mission of the airport, but are using the facility as a convenient and affordable business or industrial parks.

Off-Airport visitor spending (Direct Impacts) are expenditures made by air travelers who are visiting from outside the region, and occurs off the airport-in the regional economy. Visitor spending includes lodging, food, entertainment, retail purchases and ground transportation (retail purchases and on-airport car rentals are captured by on-airport impacts). Visitor spending is analyzed for commercial passengers as well as for general aviation pilots and passengers. Visitors flying into Oregon from another state or nation contribute to the airport's regional economy as well as to the state. However, passengers flying within Oregon, from one region to another, contribute to the region of their destination airport, but are not bringing additional money into Oregon. Therefore, in regions with air carrier airports, the direct impact of visitor spending for the region is higher than the impact of visitor spending for the state.

Airport dependent impacts represent area businesses that are dependent on an airport for incoming and outgoing, and for business travel. These businesses may relocate or suffer substantial loss if the airport were not available. This impact is not included in traditional economic impact methodology and is analyzed and reported by region for this study. Thus the

economic dependence of a region on aviation represents the cumulative impacts of all airports within a region. The analysis is provided as an indicator of the importance of airports to regional economies.

Spin-off impacts (Multiplier Affect) are calculated using impact multipliers, which are used to reflect the recycling of dollars through both the regional and state economy. A dollar spent in the economy does not disappear; rather, it continues to move through the local economy in successive rounds until it is incrementally exported from the community. As the expenditures described above are released into the economy, they circulate among other industry sectors, creating successive waves of additional economic benefit in the form of jobs, payroll, and output (expenditures). These successive rounds of spending are known as spin-off impacts, and help to represent the full impact of each dollar spent in a region. An example would be an airport employee spending his or her salary for housing, food, and other services. Spending occurring outside the area is considered economic leakage and is not reflected in the multiplier. Spin-off impacts are often reported as indirect and induced impacts. Indirect impacts reflect the purchase of goods and services by businesses. Induced impacts reflect worker making consumer purchases.

The project team analyzed the economic contributions of 91 airports under the jurisdiction of the Oregon Department of Aviation (ODA). In addition, the Port of Portland commissioned a separate economic impact studies of Portland International Airport, Portland Hillsboro Airport and Portland Troutdale Airport, which are administered by the Port. The sum of economic impacts derived from the OAP 2007 and the Port of Portland studies account for economic impacts generated by all public use airports in Oregon.

4.3.a Contribution of Airports to the Economy of Oregon

As shown in **Table 4.1**, Oregon public-use airports contributed a total economic impact of \$8.3 billion to the state economy, including \$3 billion from ODA airports and more than \$5 billion from Port of Portland airports. Following Table 4.1 is a summary entitled *Airport Role in Economy*, which illustrates the individual airport economic impact.

Additional study highlights include:

- Oregon ODA public-use airports, including airport tenants, directly employ 7,000 people for aviation related activities and expend \$259 million in wages
- Oregon ODA public-use airport employees and tenants earned an average annual salary of \$36,000 per year for aviation activities and \$35,000 per worker, when including non-aviation jobs
- Off-airport visitor industry employees earn an average annual salary of \$15,000 per year

Table 4.1 Economic Contribution of Airports to the Oregon Economy

	Jobs	Wages	Business Sales
Direct Effects of ODA On-Airport Aviation Activities and Visitor Spending			
On-Airport, including FBO & air related tenants	7,273	\$262,147,000	\$827,475,000
Off-Airport: visitor spending	6,762	\$101,641,000	\$324,097,000
Subtotal of Direct Effects From ODA Airports	14,035	\$363,788,000	\$1,151,572,000
ODA Spin-off Effects of Supplier and Income Re-spending			
Due to On-Airport Aviation	12,029	\$305,851,000	\$883,988,000
Due to Visitor Spending	3,558	\$94,459,000	\$310,756,000
Subtotal of Spin-off Effects	15,587	\$400,310,000	\$1,194,744,000
Total ODA Airport Aviation Related Impacts	29,621	\$764,098,000	\$2,346,316,000
ODA Airport Generated Impacts of Non-Aviation Activities			
On Airport Non-Aviation Activities	2,177	\$67,294,000	\$320,530,000
Spin-offs due to Non-Aviation Activities	3,374	\$96,239,000	\$332,084,000
Total ODA Airport Non-Aviation Impacts	5,551	\$163,533,000	\$652,614,000
ODA Airports Total Aviation and Non-Aviation Related	35,172	\$927,631,000	\$2,998,930,000
Port of Portland Totals*			
Airport Generated	20,005	\$941,244,000	\$3,533,456,000
Visitor Generated	39,418	\$907,718,000	\$1,740,344,000
Total Impact Port of Portland Airports	59,423	\$1,848,862,000	\$5,273,800,000
Grand Total – All Airports	94,595	\$2,776,493,000	\$8,272,630,000

Source: Airport and Tenant Surveys, EDR Group and Mead & Hunt Analyses, IMPLAN econometric package.

Note: Numbers may not add due to rounding.

*Port of Portland Airports include Portland International Airport, Portland Hillsboro Airport and Portland Troutdale Airport. Data for the Port of Portland airports was provided by the Port.

Oregon Aviation Plan 2007

Version OR 2.1 5/22/07

Airport Role in Economy

Airport: Newport Municipal
Airport Code: KONP

County: Lincoln

Region: Willamette Valley and Coast

Evaluated for Year: 2005

Activity Data

Total Commercial Operations:	0
Total Commercial Emplancements:	0
Total Commercial Visitors:	0
Total GA Operations:	24,027
Total GA Passengers:	48,054
Total GA Visitors:	14,025
Total Military Operations:	0

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On-going Contribution to the Regional and State Economies

	Jobs		Wages		Business Sales	
	Local	State	Local	State	Local	State
Direct Effects of On Airport Activities and Visitor Spending						
1. On Airport (incl. FBO and air related tenants)	146	146	\$4,187,000	\$4,187,000	\$12,749,000	\$12,749,000
2. Off-Airport: Visitor Spending	29	29	\$415,000	\$415,000	\$1,364,000	\$1,364,000
Total Direct	175	175	\$4,602,000	\$4,602,000	\$14,113,000	\$14,113,000
Spin-off Effects: Supplier and Income Re-spending						
3. Due to On Airport Aviation	118	128	\$3,111,000	\$3,736,000	\$9,697,000	\$11,825,000
4. Due to Visitor Spending	13	15	\$345,000	\$399,000	\$1,128,000	\$1,355,000
Total Spin-off	131	143	\$3,456,000	\$4,135,000	\$10,825,000	\$13,180,000
Total Airport Aviation Related Impacts	306	319	\$8,058,000	\$8,737,000	\$24,938,000	\$27,293,000
Total Airport Generated Impacts - Not Aviation						
5. On Airport Non-aviation Activities	220	220	\$5,259,000	\$5,259,000	\$20,921,000	\$20,921,000
6. Spin-offs due to Non-aviation Activities	173	213	\$4,462,000	\$5,412,000	\$13,988,000	\$17,418,000
Total Airport Non-aviation Impacts	393	433	\$9,721,000	\$10,671,000	\$34,909,000	\$38,339,000
Total Aviation and Non-aviation Related	700	751	\$17,779,000	\$19,408,000	\$59,847,000	\$65,632,000
Regional Off-Airport Aviation Dependent Business Activity						
7. Direct Business Activity	8,061	8,061	\$368,349,000	\$368,349,000	\$2,142,913,000	\$2,142,913,000
8. Spin-offs due to Dependent Activity	14,509	17,423	\$425,253,000	\$518,828,000	\$1,468,166,000	\$1,788,387,000
Total Off-airport Aviation Dependent Activity	22,570	25,484	\$793,602,000	\$887,177,000	\$3,611,079,000	\$3,931,300,000

Note: Regional Off-airport Aviation Dependent Business Activities account for business activity in the region that rely on aviation for business travel and cargo, and do not reflect a specific airport.

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