Southwest Oregon Regional Airport

Airport Master Plan

Chapter Two: Forecast of Aviation Demand

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January 2026

DRAFT

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Chapter 2. Forecast of Aviation Demand

The forecast of aviation demand is a critical milestone in the airport master planning process. It provides a strategic framework to understand and anticipate aviation activity expected at Southwest Oregon Regional Airport (OTH) over a 20-year planning horizon, spanning Federal Fiscal Year (FFY) 2023 through 2043. By providing data-driven insights into future demand, the forecast informs the development of airport facilities and infrastructure to effectively meet both current and future needs.

Southwest Oregon Regional Airport serves as the principal commercial gateway for southwest Oregon and is the only airport with scheduled airline service along a 600-mile stretch of coastline between Oregon and Washington. Aviation demand is shaped by tourism, trade, emergency services, and the need for reliable connectivity to national hubs. These factors create a demand profile characterized by pronounced summer peaks, modest yet steady baseline activity, and a critical dependence on network connectivity.

The baseline year for this forecast is FFY 2023, which runs from October 1 of the previous calendar year through September 30 of the current calendar year. Forecast results are compared to the FAA's 2024 Terminal Area Forecast (TAF), published in January 2025, which reports data by FFY. The current TAF provides projections from FFY 2024 through FFY 2050.

To maintain consistency with FAA forecasting conventions, this forecast aligns with the FFY and covers a 20-year period from FFY 2023 through FFY 2043. It is divided into three planning horizons—short-term (2028), intermediate-term (2033), and long-term (2043)—which provide a structured framework for analyzing growth, identifying facility needs, and supporting capital improvement planning throughout the forecast period.

2.1 Airport Service Area and Socioeconomic Overview

An understanding of the airport's service area and its underlying socioeconomic characteristics is essential to developing reliable aviation activity forecasts. The catchment area, also referred to as the service area or market area, is the geographic region from which an airport attracts the majority of its passengers and is influenced by factors such as proximity, transportation accessibility, the variety and frequency of airline services, and competitive airfare pricing relative to other airports. Clearly defining the catchment area and establishing its demographic and economic profile are essential for forecasting air carrier demand and enplanements, as they help identify the communities whose residents are most likely to use the airport for air travel.

2.1.1. Passenger Catchment Area

Southwest Oregon Regional Airport serves Coos County as its primary catchment area, which had a 2020 population of 64,929. Coos County's economy is anchored by natural resource industries including timber, commercial fishing, and agriculture, but is increasingly driven by a growing tourism sector centered on coastal recreation, golf, and cultural attractions. Healthcare, marine fabrication, and mineral extraction add year-round economic stability, while port and rail

infrastructure support industrial diversification. Despite leakage to larger regional hubs such as Eugene (EUG), Medford (MFR), and Portland (PDX), Coos County's location, enterprise zones, and growing visitor demand reinforce its role as a key gateway to Oregon's southern coast. Figure 2-1 shows the catchment area for OTH.

Figure 2-1 Catchment Area
Coos County, Oregon

Source: Ardurra, 2025

2.1.2. Socioeconomic Characteristics

Socioeconomic data is used to understand the population of users and the community who live within the catchment area. Historical and projected socioeconomic trends can directly impact demand for air travel and aviation services, providing important context for forecasting future activity at the airport.

Historical and projected data for population, employment, and personal income in Coos County are summarized in Table 2-1 and were sourced from Woods & Poole Economics, a nationally recognized provider of long-term economic forecasts. Personal income in Coos County has

historically grown at a faster rate than both population and employment. Between 2013 and 2023, personal income grew at a compound annual growth rate (CAGR) of 5.3 percent, a trend projected to continue over the next 20 years at a slightly lower CAGR of 4.3 percent. In contrast, population and employment are expected to grow at more modest rates, with a projected CAGR of 0.2 percent and 0.4 percent, respectively.

Table 2-1 Population, Employment, and Personal Income

Coos County

Data Type	Year	Population	Employment	Personal Income
Historical	2013	62,455	30,215	$34,842
Baseline	2023	64,212	32,427	$58,421
Forecast	2028	64,762	33,134	$73,027
	2033	65,314	33,819	$90,133
	2043	66,427	35,196	$135,889
CAGR	**2013-2023**	**0.3%**	**0.7%**	**5.3%**
	2023-2043	**0.2%**	**0.4%**	**4.3%**

Source: Woods & Poole, 2025

2.2 National and Regional Aviation Trends

Aviation trends at both the national and state levels provide critical context for forecasting activity at OTH. National forecasts capture broad shifts in passenger demand, fleet composition, and emerging technologies that affect airspace and airport infrastructure planning. In parallel, state planning efforts localize insight into aviation system needs, economic roles, and infrastructure priorities. Together, these perspectives help shape realistic assumptions about how OTH will evolve within Oregon's broader air transportation system.

2.2.1. FAA Aerospace Forecast 2025-2045

The FAA Aerospace Forecast for FY 2025–2045, released in June 2025, extends national aviation projections over the next 20 years, building on prior insights with newer trends and emerging sectors.

Compared to the previous year's outlook, the 2025 forecast anticipates stronger growth across multiple sectors. System-wide passenger enplanements are now projected to increase at an average annual rate of 2.5 percent, up from the 2.0 percent rate forecasted in 2024. This upward revision reflects greater air travel demand, particularly for international markets, which are forecasted to grow by 2.8 percent annually, while domestic enplanements are projected to rise at 1.3 percent. Importantly, while passenger volumes are expected to rise steadily, aircraft operations are projected to grow more slowly. This reflects ongoing efforts to consolidate routes, increase aircraft size, and improve load factors, with system load factors now projected to reach 87 percent by 2045, up from 85 percent in the previous forecast.

General aviation continues to show positive trends. The FAA maintains its projection of approximately 2 percent annual growth in the business jet fleet, supported by growing demand for flexible, point-to-point air travel. Table 2-2 shows the active general aviation fleet from the FAA Aerospace Forecast. The 2025 forecast goes further than its predecessor by formally integrating emerging aviation sectors such as unmanned aircraft systems (UAS) and advanced air mobility (AAM) into its long-term outlook. These technologies, especially electric vertical takeoff and landing (eVTOL) aircraft, are expected to play an increasingly visible role in future aviation systems, though their deployment in regional markets like Coos County will likely lag larger metropolitan areas. Still, their eventual integration into the National Airspace System has implications for infrastructure compatibility, airspace coordination, and regulatory oversight at all airports.

The forecast also reaffirms the growth and transformation of the air taxi and charter sector, driven by digital booking platforms, membership-based programs, and flexible ownership models that are expanding access to private air travel. At OTH, where charter activity and seasonal fluctuations are notable, these trends may contribute to sustained but variable growth in on-demand services.

Table 2-2 FAA Aerospace Forecast

National Active GA Fleet

Data Type	FFY	Single Engine	Multi-Engine	Turboprop	Jet	Rotor	Exp.	Light Sport	Other	Total
Historical	2013	124,398	13,257	9,619	11,637	9,765	24,918	2,056	4,277	199,927
	2014	126,036	13,146	9,777	12,362	9,966	26,191	2,231	4,699	204,408
	2015	127,887	13,254	9,712	13,440	10,506	27,922	2,369	4,941	210,031
	2016	129,652	12,986	9,779	13,751	10,577	27,585	2,478	4,986	211,794
	2017	129,833	13,083	9,949	14,217	10,511	26,921	2,551	4,692	211,757
	2018	130,179	12,861	9,925	14,596	9,989	27,531	2,554	4,114	211,749
	2019	128,926	12,470	10,242	14,888	10,198	27,449	2,675	4,133	210,981
	2020	124,059	11,947	10,317	15,316	9,746	26,367	2,570	3,818	204,140
	2021	126,735	11,885	10,391	15,270	10,032	27,960	2,650	4,271	209,194
	2022	126,076	11,652	10,713	16,126	9,769	28,062	2,666	4,476	209,540
	2023	127,573	11,727	10,951	16,537	10,051	30,114	3,007	4,262	214,222
Forecast	2025	126,690	11,580	11,100	17,505	10,420	30,425	3,285	4,595	215,600
	2028	125,745	11,385	11,275	19,105	11,020	30,800	3,620	4,685	217,635
	2033	124,670	11,150	11,710	22,055	12,080	31,865	4,245	4,745	222,520
	2038	123,955	10,995	12,345	25,270	13,180	33,020	4,905	4,785	228,455
	2043	123,790	10,925	13,170	28,550	14,280	34,165	5,590	4,825	235,295
	2045	123,925	10,925	13,540	29,865	14,715	34,670	5,870	4,840	238,350
CAGR	**2025-2045**	**-0.1%**	**-0.3%**	**1.0%**	**2.7%**	**1.7%**	**0.7%**	**2.9%**	**0.3%**	**0.5%**

Source: FAA Aerospace Forecast, 2025

2.2.2. 2018 Oregon Aviation Plan

The 2018 Oregon Aviation Plan (OAP v6.0), developed by the Oregon Department of Aviation, presents a statewide assessment of Oregon's 97 public-use airports and provides 20-year projections of aviation demand through 2035. The plan, which assigns functional roles to Oregon's public-use airports, classifies OTH as a Category I Commercial Service Airport. That category of airport is noted as supporting scheduled airline operations, general aviation, and air cargo and one of the key regional airports in Oregon's coastal and southern regions.

The plan anticipated steady but modest growth in both commercial and general aviation activity throughout Southwest Oregon. Table 2-3 shows the OAP v6.0 forecasted aviation activity at OTH. While statewide commercial enplanement growth is concentrated in larger metro areas, airports like OTH were expected to retain stable passenger levels, driven by regional tourism and business activity.

Table 2-3 OAP OTH Forecast

Southwest Oregon Regional Airport

Data Type	Year	Enplanements	GA Operations	Based Aircraft
Baseline	2015	15,849	10,831	56
Forecast	2020	15,970	11,327	58
	2025	16,781	11,846	61
	2035	18,530	12,957	68
CAGR	**2015-2035**	**0.78%**	**0.90%**	**1.10%**

Source: Oregon Aviation Plan v6.0, 2018

General aviation (GA) was expected to remain a dominant activity driver at OTH and other airports in the region. Statewide, the OAP v6.0 forecasts growth in the GA aircraft fleet, with increasing shares of business jets, light sport aircraft, and technically advanced aircraft. This trend is mirrored in Southwest Oregon, where general aviation supports business travel, air charter services, medical flights, pilot training, and recreational flying. The number of based aircraft was projected to rise gradually, and aircraft operations were expected to fluctuate seasonally, particularly during peak tourism months.

2.3 Historical Aviation Activity

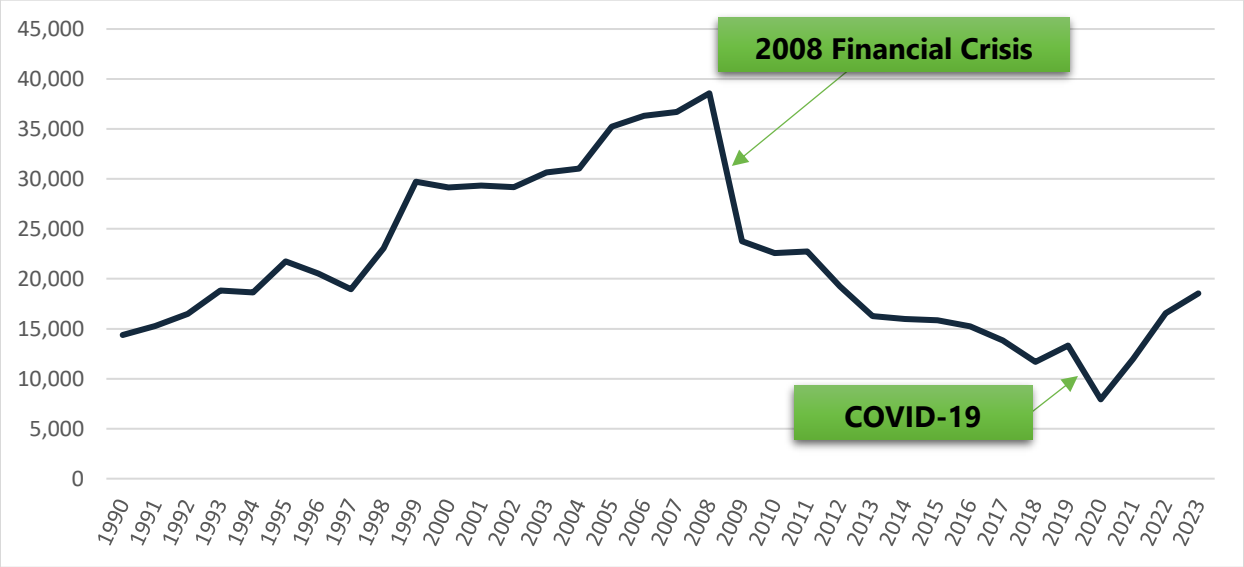
A review of historical aviation activity is necessary for understanding the trends and patterns shaping the airport's aviation demand over time. For this analysis, historical aviation activity at OTH was established using data from the FAA Terminal Area Forecast (TAF) exclusively. The TAF serves as the official federal forecasting tool and is widely used to support national budgeting, planning, and regulatory functions, as well as to guide state and local aviation development. By relying solely on TAF data, this assessment maintains consistency with federal planning standards and ensures alignment with official forecasts used across the aviation industry.

2.3.1. Historical Passenger Enplanements

Commercial service at OTH has been maintained consistently since the 1940s, when West Coast Airlines connected North Bend/Coos Bay to Medford, Roseburg, Eugene, and Portland, Oregon from what was known as North Bend Airport. The modern era of commercial service at OTH began in 1982 when Horizon Air initiated service to Portland. Over the next three decades, passenger enplanement trends at OTH reflected broader shifts in the regional and national aviation landscape. From 1990 through 2008, OTH experienced enplanement growth, supported by consistent commercial service and steadily increasing regional demand. This period of growth continued into July 2008, when a second airline, SkyWest, began service to San Francisco. However, in October of that year, Horizon abruptly ended operations at OTH, discontinuing service to Portland and Seattle. The departure of Horizon Air and the resulting decline in passenger traffic reflected broader national trends following the 2008 economic downturn, as airlines across the country reduced capacity, consolidated routes, and shifted focus to larger hubs. Between 2008 and 2011, OTH experienced serval airline service adjustments, including route changes to Portland and Seattle and the introduction of turbojet aircraft on SkyWest's San Francisco route. In 2015, SkyWest also added seasonal summer service to Denver, but overall enplanements at OTH remained suppressed from this period through 2020.

Beginning in 2021, the airport began to experience a rapid rebound from the drop in enplanements associated with the COVID 19 pandemic. This recent surge in passenger activity has been driven by multiple factors, including improved local economic conditions and the successful reintroduction and stabilization of scheduled airline service. Regional tourism, however, remains arguably the primary driver of passenger demand at OTH. Bandon Dunes Golf Resort alone attracts more than 35,000 visitors annually from across the country, serving as a significant generator of air travel demand. Post COVID 19, tourism demand to the region has accelerated similarly to many rural, resort type destinations across the United States. As such, regional tourism is expected to remain a dominant passenger activity driver at the airport. Historical enplanements at OTH are shown in Figure 2-2.

Figure 2-2 Historical Annual Passenger Enplanements
Southwest Oregon Regional Airport



Source: FAA TAF, 2025

A key contributor to the current growth trend is the strong performance of the existing commercial service. According to U.S. DOT T-100 Segment data, load factors on current routes have shown consistent improvement, indicating rising demand and more efficient utilization of available seat capacity. Based on airport records, enplanements totaled 20,585 in FFY 2024. Table 2-4 shows historic passenger enplanements at OTH.

Table 2-4 Historical Passenger Enplanements
Southwest Oregon Regional Airport

FFY	Historic Passenger Enplanements
2013	16,275
2014	15,987
2015	15,849
2016	15,243
2017	13,847
2018	11,677
2019	13,335
2020	7,937
2021	11,966
2022	16,557
2023	18,526
CAGR 2013-2023	**1.30%**

Source: FAA TAF, 2025
Notes: Airport records recorded 20,585 enplanements for FFY 2024, equating to a 2.2 percent CAGR between FFY 2013 and 2024

2.3.2. Historical Aircraft Operations

An aircraft operation is defined by either a takeoff or a landing. The FAA categorizes an operation based on the nature of the flight into four primary categories:

- Air Carrier - An air carrier operation involves an aircraft with a seating capacity of more than 60 seats or a cargo payload capacity of more than 18,000 pounds. Additionally, air carrier operations are those carrying passengers or cargo for hire or compensation.
- Air Taxi/Commuter – Air Taxi operations represent scheduled commercial flights, nonscheduled commercial flights, and charter flights with aircraft with 60 seats or fewer or a cargo payload capacity of 18,000 pounds or less. Additionally, air taxi operations are those carrying passengers or cargo for hire or compensation.
- General Aviation - General aviation (GA) operations are any type of operation that is not included in one of the previous defined categories. These are typically privately owned aircraft used for training, recreation, business, or personal use.
- Military - Military operations include all classes of U.S. military or federal government aircraft.

Those types of operations are further categorized into itinerant and local operations. Itinerant operations refer to aircraft movements departing from or arriving at the airport from another location outside the local airspace. These flights typically involve travel between different airports, and at a minimum outside the immediate vicinity and airspace of OTH. Local operations consist of aircraft movements remaining within the airport's general vicinity. These flights typically involve operations within the traffic pattern or designated practice areas.

Table 2-5 presents historical aircraft operations at the airport based on data reported by the FAA TAF. However, since the Airport Traffic Control Tower (ATCT) at OTH is not a 24-hour facility, operations conducted during non-towered hours, which typically occur at night, are not captured in this dataset.

Table 2-5 Historical Aviation Activity
Southwest Oregon Regional Airport

FFY	Itinerant Operations				Local Operations		Total Historic Operations
	Air Carrier	Air Taxi/ Commuter	GA	Military	GA	Military	
2013	0	5,680	4,619	3,147	1,429	5,302	20,177
2014	0	5,919	4,382	2,829	774	3,957	17,861
2015	0	5,871	4,271	2,597	689	3,516	16,944
2016	52	4,774	3,687	2,719	475	3,312	15,019
2017	69	4,018	3,497	2,846	659	3,169	14,258
2018	71	3,827	4,547	3,497	1,506	4,005	17,453
2019	64	3,631	4,151	2,670	766	3,207	14,489
2020	66	3,601	3,999	2,737	1,069	3,744	15,216
2021	311	3,805	5,715	2,338	3,134	3,121	18,424
2022	422	3,520	5,333	2,474	3,860	2,489	18,098
2023	676	3,212	4,907	2,099	4,410	1,612	16,916
CAGR 2013-2023	**N/A**	**-5.54%**	**0.61%**	**-3.97%**	**11.93%**	**-11.22%**	**-1.75%**

Source FAA TAF, 2025

2.3.3. Historical Based Aircraft

A based aircraft is one that is regularly stationed at the airport, typically tied to a hangar lease or tie-down agreement for an extended period. These aircraft are considered the airport's resident fleet and are a key indicator of the airport's local general aviation activity level. Table 2-6 shows the historic based aircraft at OTH as reported by the FAA TAF.

Table 2-6 Historical Based Aircraft
Southwest Oregon Regional Airport

FFY	Historic Based Aircraft
2013	56
2014	56
2015	51
2016	56
2017	51
2018	56
2019	56
2020	56
2021	56
2022	56
2023	58
CAGR 2013-2023	**0.35%**

Source: FAA TAF, 2025

As part of this master plan study, a validation of the current based aircraft was conducted with airport staff. That effort determined there to be a total of 33 based aircraft. The inconsistency between the number of actual based aircraft and the totals reported in the FAA TAF is likely due to reporting discrepancies in prior years that were not subsequently adjusted. Contributing factors may include variations in how previous airport administrations counted based aircraft, including the potential inclusion of aircraft operating through-the-fence, such as those associated with the U.S. Coast Guard. In addition, the Airport previously had a second FBO that had approximately 10 based aircraft. When this FBO ceased operations, those aircraft were no longer based at OTH, which also would have contributed to the reduction in total based aircraft compared to earlier reports. For this study, the current based aircraft count of 33 is used as the baseline for forecasting, as detailed in Table 2-7.

Table 2-7 Validated Based Aircraft

Southwest Oregon Regional Airport

Aircraft Type	Based Aircraft
Piston Single Engine	24
Piston Multi-Engine	1
Turbine Turboprop	7
Turbine Turbojet	1
Total Based Aircraft	**33**

Source: FAA TAF, 2025

2.4 Passenger Enplanement Forecast

Since the conclusion of the 2013 Master Plan, the dynamics driving passenger activity appear to have strengthened, especially since the COVID 19 pandemic. Since 2018, OTH has kept up with the accelerated passenger demand being seen in Eugene (EUG) and Medford (MFR). As discussed below, OTH has kept up its market share of regional enplanements, and this is despite having no new routes or frequency. Essentially, demand is gaining momentum and load factors are increasing year over year.

A major factor driving passenger demand at OTH is Bandon Dunes. The golf resort has seven courses and draws visitors from around the world each year. Prior to the COVID pandemic, the resort accommodated roughly 25,000 to 30,000 visitors annually. After COVID, their numbers skyrocketed and in 2024 they accommodated roughly 40,000. Expansion plans are in place in 2026 for an eighth course to be built along with additional lodging.[1]

Qualitatively, it appears that Bandon Dunes, like many rural resort areas across the Nation, has been "found," and those with higher discretionary spending and leisure time are frequenting and/or moving into the area. This is validated by the fact that despite OTH having roughly half of

[1] Volaire Aviation Consulting, 2025

their historical peak enplanement levels, terminal parking was hitting capacity, and an expansion project was completed in 2025 to provide additional parking.

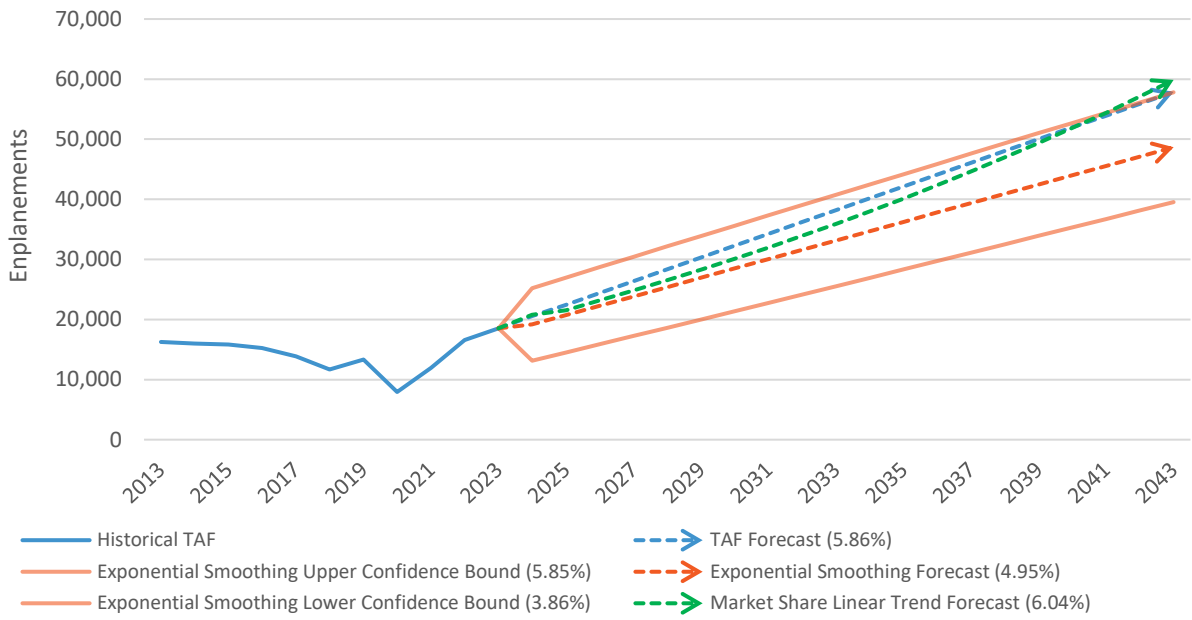
Overall, air service demand is strong at OTH, with high performance of current routes. The following describes the forecast for OTH, taking into account these factors.

2.4.1. Preferred Passenger Forecast

Multiple forecasting methods were used to develop a range of passenger enplanement projections for OTH, incorporating historical data, regional trends, and statistical analysis. The forecasting methods, which are shown in Figure 2-3, include:

- Time Series Analysis with Exponential Smoothing: This method used historical passenger enplanement data from the FAA TAF for the years 2018 through 2023. This method produced a forecast along with associated lower and upper confidence bounds, offering a probabilistic range of future enplanement outcomes based on recent trends.
- Market Share and Trend Line Analysis: This method calculated OTH's share of total regional enplanements—defined as the combined enplanements from OTH, Eugene (EUG), and Medford (MFR). Using OTH's market share between 2018 and 2025, a linear trend was established by determining the slope and y-intercept of the market share line over time. This trend was then applied to regional enplanement projections to estimate future passenger enplanements at OTH.
- Socioeconomic Regression Analysis: This method explored the potential relationships between OTH passenger enplanements and Coos County socioeconomic indicators, including population, employment, and personal income. However, this analysis found no statistically significant correlation between these variables and historical passenger enplanement levels at OTH, and as such, it was not used to inform the final forecast.

Figure 2-3 Passenger Enplanement Forecast Methods
Southwest Oregon Regional Airport



Source: FAA TAF, Ardurra, 2025

In alignment with federal planning assumptions, the FAA TAF was selected as the preferred passenger enplanement forecast for OTH. The market share forecast was developed as supporting analysis to the TAF, offering additional context on the Airport's relative position within the broader regional air service market. This approach ensures alignment with the FAA TAF while incorporating local and regional dynamics that influence air service demand. The market share analysis reflects the Airport's competitive position relative to neighboring airports and captures ongoing shifts in passenger behavior and airline service patterns.

The forecast assumes that OTH will continue to strengthen its share of total regional enplanements, supported by current airline performance and sustained local demand. With a projected CAGR of 5.86 percent over the 20-year planning horizon, this forecast represents a balanced yet optimistic outlook, grounded in recent performance and realistic expectations for regional market dynamics. Table 2-8 summarizes the forecast from a 2023 baseline through 2043.

Table 2-8 Passenger Enplanement Forecast
Southwest Oregon Regional Airport

Year	Passenger Enplanement Forecast
2023	18,526
2028	28,361
2033	38,198
2043	57,873
CAGR 2023-2043	**5.86%**

Source: FAA TAF, Ardurra, 2025

2.4.2. Passenger Enplanement Scenarios

To further evaluate potential future passenger activity at OTH, a series of enplanement scenarios were developed to reflect varying levels of commercial service expansion and market performance. The 2025 baseline reflects existing operations in the San Francisco (SFO) and Denver (DEN) markets. For the SFO market, the baseline comprises one daily departure using 76-seat Embraer ERJ-175 aircraft with an average 80 percent load factor during the May-November peak season. During the off-season (December-April), service operates four times per week with an average load factor of 70 percent. The DEN market baseline reflects one daily departure with 76-seat Embraer ERJ-175 aircraft and an 85 percent load factor from May through October.

Building from this baseline, several potential service scenarios were analyzed. The scenarios were built upon information garnered through discussions with SkyWest Airlines and Airport staff. They are based on realistic increases in passenger service at OTH.

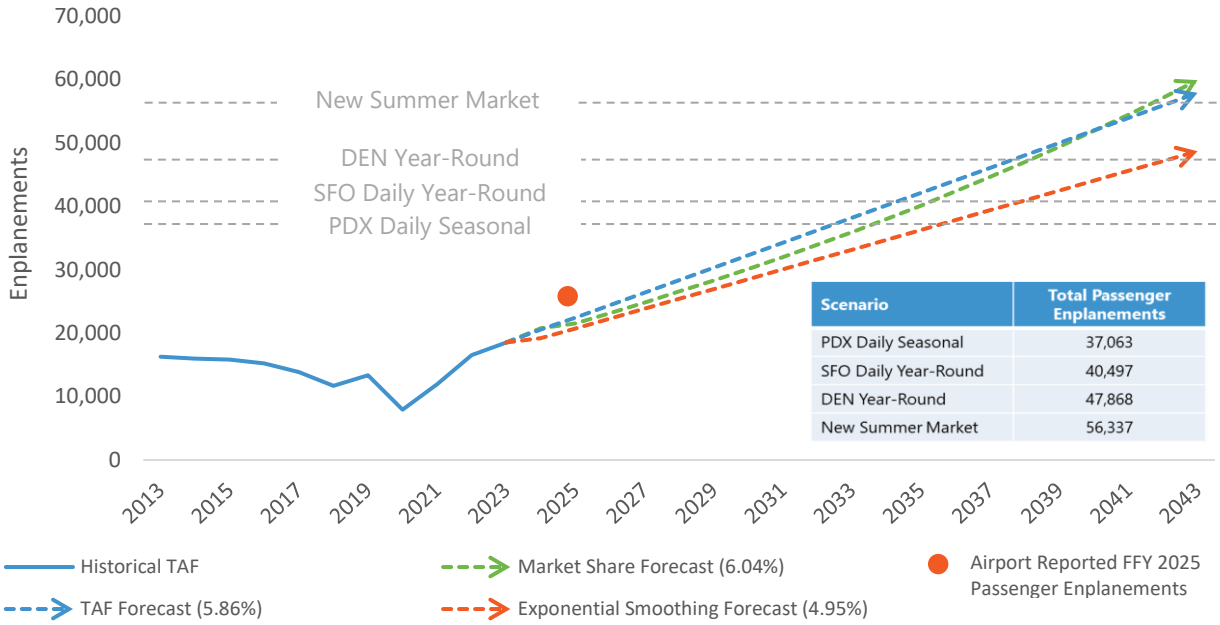
Below, each scenario is described in sequence, building upon each other to determine the total demand possible as well as an understanding of the demand related to each additive route and/or frequency.

- Portland (PDX) Daily Seasonal Service: This scenario introduces new seasonal service to PDX operating one daily departure from May through September using 76-seat aircraft and assuming initial load factors starting at 65 percent.
- San Francisco (SFO) Daily Year-Round Service: This scenario extends daily SFO operations year-round and assumes that initially the off-season load factor would be 65 percent until the market matured. The in-season SFO service remains unchanged, while the new PDX service is expected to improve to a 70 percent load factor over the same operating period. The DEN market remains unchanged in this scenario.
- Denver (DEN) Year-Round Service: This scenario assumes year-round operations for the Denver market, maintaining one daily departure from May through November at an 85 percent load factor and adding four weekly off-season flights from December through April with a 65 percent load factor. The SFO market remains at 80 percent load factor during the peak season and increases to 70 percent in the off-season, while the PDX market is expected to achieve a 75 percent load factor.
- New Summer Market Service: This scenario introduces a new summer seasonal market operating daily from May through September with 76-seat aircraft an initial load factor of 65 percent. It maintains SFO service as previously defined and assumes improved PDX performance with an 80 percent load factor. DEN service continues year-round with an increased off-season load factor of 70 percent.

Collectively, these scenarios provide a range of plausible enplanement outcomes based on incremental service expansions. The resulting passenger enplanement projections validate the FAA TAF forecast and demonstrate the TAF forecast is achievable in the master plan time horizon.

Figure 2-4 below shows the TAF and market share forecasts for passenger enplanements at OTH with markings for the relative enplanement levels associated with each scenario.

Figure 2-4 Passenger Enplanement Forecasts and Scenarios
Southwest Oregon Regional Airport



Scenario	Total Passenger Enplanements
PDX Daily Seasonal	37,063
SFO Daily Year-Round	40,497
DEN Year-Round	47,868
New Summer Market	56,337

Source: FAA TAF, Ardurra, 2025

2.5 Based Aircraft Forecast

Consistent with national projections presented in the FAA Aerospace Forecast 2025-2045, the based aircraft forecast for OTH reflects expected trends in the active general aviation fleet. Piston-engine aircraft are expected to remain flat over the 20-year planning period, consistent with national projections showing limited replacement and fleet aging. In contrast, turbine-powered aircraft are expected to experience moderate growth nationwide. Turboprop aircraft are projected to grow at a CAGR of 1.0 percent, and turbojet aircraft at a CAGR of 2.7 percent. Consistent with current helicopter operations and upcoming hangar construction, one helicopter is forecast to be based at the airport beginning in 2028. The fleet mix forecast for based aircraft at OTH is summarized in Table 2-9.

Table 2-9 Based Aircraft Fleet Mix Forecast
Southwest Oregon Regional Airport

Year	Piston		Turbine		Helicopter	Total
	Single Engine	Multi-Engine	Turboprop	Turbojet		
2025	24	1	7	1	0	33
2028	24	1	7	1	1	34
2033	24	1	8	1	1	35
2043	24	1	8	2	1	36
CAGR 2025-2043	**0.00%**	**0.00%**	**1.00%**	**2.70%**	**N/A**	**0.48%**

Source: Ardurra, 2025

Combined, the total based aircraft at OTH are expected to increase modestly, with an overall CAGR of 0.48 percent over the planning horizon. The based aircraft forecast is summarized below in Table 2-10.

Table 2-10 Based Aircraft Forecast

Southwest Oregon Regional Airport

Year	Based Aircraft Forecast
2025	33
2028	34
2033	35
2043	36
CAGR 2025-2043	**0.48%**

Source: Ardurra, 2025

2.6 Operations Forecast

A combination of forecasting methods was used to develop the operations forecast for OTH. Historical activity data, enplanement/operational planning factors, relationships between based aircraft and operations, and established national growth trends were combined to produce a projection of future aviation activity.

The preferred operations forecast for OTH was developed using the FAA Aerospace Forecast 2025-2045 projections for aircraft operations at airports with air traffic control services as the baseline reference for activity growth rates by operational category. Overall, the operations forecast reflects steady long-term growth in aviation activity at OTH, supported by sustained GA demand and commercial service levels.

Air taxi activity is expected to grow gradually in line with national trends, while military operations are projected to remain consistent with recent activity levels. To project GA operations, a 2024 baseline ratio of GA operations per based aircraft was applied based on forecasted based aircraft totals. Itinerant GA operations have been adjusted above national trends to reflect the higher activity levels observed at OTH, increasing the annual growth rate from the national projection of 0.5 percent to 1.0 percent. For air carrier operations, a ratio of operations per enplanements was developed based on average load factors and continued use of ERJ-175 aircraft, which indicated less air carrier operations than the FAA TAF currently projects.

Combined, total operations at OTH have a projected CAGR of 1.4 percent over the 20-year planning horizon, representing a realistic and balanced forecast based on historical performance, national trends, and the airport's operating environment. Table 2-11 summarizes the aircraft operations forecast for OTH from a 2023 baseline through 2043.

Table 2-11 Operations Forecast
Southwest Oregon Regional Airport

Year	Itinerant				Local		Total
	Air Carrier	Air Taxi	GA	Military	GA	Military	
2023	676	3,212	4,907	2,099	4,410	1,612	16,916
2028	995	3,426	5,157	2,424	5,362	2,558	19,923
2033	1,340	3,655	5,420	2,424	5,362	2,558	20,760
2043	2,031	4,159	5,987	2,424	5,362	2,558	22,521
CAGR 2023-2043	**5.65%**	**1.30%**	**1.00%**	**0.72%**	**0.98%**	**2.34%**	**1.44%**

Source: FAA TAF, Ardurra, 2025

2.7 TAF Comparison

The FAA requires the forecast for primary, nonhub, commercial service airports like OTH to be within ±10 percent of the TAF for the five-year forecast and within ±15 percent for the ten-year forecast. If a forecast is not within this range, additional justification and coordination with the FAA must occur for approval.

The passenger enplanement forecast carried forward the 2025 TAF projections; therefore, there is a 0 percent difference from the TAF for each of the forecast periods. The 2023 operations baseline was established using the 2025 TAF, resulting in a 0 percent difference for the base year. While the Master plan forecast projected fewer air carrier operations than the TAF, the difference was offset by an increased itinerant GA forecast, resulting in a difference of 2.4 percent for the five-year forecast, 1.4 percent for the ten-year forecast, and 0.8 percent for the 20-year forecast. The based aircraft forecast was validated in 2025, which identified 33 based aircraft compared to 56 in the TAF. As such, the 2025 base year is 51.7 percent lower than the TAF. Adjusting for the different base year, the Master Plan projects 48.9 percent, 46.2 percent, and 43.5 percent fewer based aircraft for the three-, eight-, and eighteen-year forecast periods, respectively, due to the lower validated base-year count. Table 2-12 shows the master plan forecast and 2025 TAF comparison, with a more detailed breakdown provided in Table 2-13.

Table 2-12 Master Plan – TAF Comparison
Southwest Oregon Regional Airport

	Year	Master Plan Forecast	2025 TAF	% Difference
Passenger Enplanements				
Base yr.	2023	18,526	18,526	0.0%
Base yr. + 5 yrs.	2028	28,361	28,361	0.0%
Base yr. + 10 yrs.	2033	38,198	38,198	0.0%
Base yr. + 20 yrs.	2043	57,873	57,873	0.0%
Operations				
Base yr.	2023	16,916	16,916	0.0%
Base yr. + 5 yrs.	2028	19,923	20,412	2.4%
Base yr. + 10 yrs.	2033	20,760	21,057	1.4%
Base yr. + 20 yrs.	2043	22,521	22,347	0.8%
Based Aircraft				
Base yr.	2025[1]	33	56	51.7%
Base yr. + 3 yrs.	2028	34	56	48.9%
Base yr. + 8 yrs.	2033	35	56	46.2%
Base yr. + 18 yrs.	2043	36	56	43.5%

Source: FAA TAF, Ardurra, 2025
Notes: [1]Based aircraft validated in 2025.

Table 2-13 Master Plan Forecast Summary Table
Southwest Oregon Regional Airport

	Base Year	Forecast Years			Compound Annual Growth Rate		
	2023[1]	2028	2033	2043	+5yr	+10yr	+20yr
Passenger Enplanements							
Air Carrier	18,526	28,361	38,198	57,873	8.89%	7.50%	5.86%
Itinerant Operations							
Air Carrier	676	995	1,340	2,031	8.04%	7.08%	5.65%
Air Taxi	3,212	3,426	3,655	4,159	1.30%	1.30%	1.30%
General Aviation	4,907	5,157	5,420	5,987	1.00%	1.00%	1.00%
Military	2,099	2,424	2,424	2,424	2.92%	1.45%	0.72%
ITINERANT TOTAL	10,894	12,003	12,840	14,601	1.96%	1.66%	1.48%
Local Operations							
General Aviation	4,410	5,362	5,362	5,362	3.99%	1.97%	0.98%
Military	1,612	2,558	2,558	2,558	9.67%	4.73%	2.34%
LOCAL TOTAL	6,022	7,920	7,920	7,920	5.63%	2.78%	1.38%
Total Operations	**16,916**	**19,923**	**20,760**	**22,521**	**3.33%**	**2.07%**	**1.44%**
Based Aircraft							
Single-Engine	24	24	24	24	0.00%	0.00%	0.00%
Multi-Engine	1	1	1	1	0.00%	0.00%	0.00%
Turboprop	7	7	8	9	1.00%	1.00%	1.00%
Turbojet	1	1	1	2	2.70%	2.70%	2.70%
Helicopter	0	1	1	1	N/A	N/A	N/A
Total Based Aircraft	**33**	**34**	**35**	**36**	**1.29%**	**0.67%**	**0.48%**

Source: FAA TAF, Ardurra, 2025
Notes: [1]Based aircraft validated in 2025.

2.8 Fleet Mix Forecast

The fleet mix forecast identifies the types of aircraft expected to operate at the airport throughout the planning period. Understanding the makeup of the aircraft fleet is essential for evaluating future airfield design needs and identifying the critical aircraft for each runway. The FAA aircraft classification parameters used in the fleet mix forecast include the Aircraft Approach Category (AAC) and Airplane Design Group (ADG). The AAC, depicted by a letter, relates to aircraft landing speeds. The ADG, depicted by a Roman numeral, relates to airplane wingspan and tail height.

The fleet mix forecast used the Master Plan operations forecast as a baseline for distributing operations by AAC and ADG. The AAC/ADG operational distribution was developed using TFMSC flight data, adjusted for local operating conditions, and scaled to match the operations forecast. Table 2-14 summarizes the fleet mix forecast.

Table 2-14 Fleet Mix Forecast

Southwest Oregon Regional Airport

AAC and ADG	Percent of Total Ops	Base Year	Forecast Years		
		2023	2028	2033	2043
A-I	20.0%	3,383	3,985	4,152	4,504
A-II	25.0%	4,229	4,981	5,190	5,630
B-I	23.0%	3,891	4,582	4,775	5,180
B-II	18.0%	3,045	3,586	3,737	4,054
B-III	0.5%	85	100	104	113
C-I	1.0%	169	199	208	225
C-II	5.0%	846	996	1,038	1,126
C-III	6.0%	1,015	1,195	1,246	1,351
D-I	1.0%	169	199	208	225
D-II	0.5%	85	100	104	113
Total Operations	**100.0%**	**16,916**	**19,923**	**20,760**	**22,521**

Source: TFMSC, Ardurra, 2025
Note: May not totalize due to rounding.

2.9 Critical Aircraft

The FAA requires identification of existing and future critical/design aircraft for airport planning purposes. The term critical aircraft and design aircraft can be used interchangeably. The critical aircraft is the most demanding aircraft, or grouping of aircraft, with regular use. Regular use is specifically defined in AC 150/5000-17, Critical Aircraft and Regular Use Determination, as 500 total annual operations, not counting touch-and-go operations.

The AAC and ADG, as well as the Taxiway Design Group (TDG), are used to classify the critical aircraft. The TDG, classified by number, relates to the outer-to-outer main gear width and the distance between the cockpit and main gear. Together, these parameters serve as the basis for

design and construction of airport infrastructure. An accurate critical aircraft determination helps ensure facilities are developed to meet the needs of each portion of the airport.

Table 2-15 summarizes the existing and future critical aircraft identified for each runway at OTH.

The critical aircraft for Runway 5-23, the airport's primary runway, is driven by commercial service operations. SkyWest Airlines operates scheduled regional jet service at OTH using the Embraer ERJ-175, which accounted for 673 total operations in FFY 2023 and 676 in FFY 2024. Based on the air carrier operations forecast, the ERJ-175 will continue to represent the most demanding aircraft operating at OTH through the planning period. As such, the ERJ-175 is identified as the existing and future critical aircraft for Runway 5-23, with an AAC of C, ADG of III, and TDG of 3.

The critical aircraft for Runway 13-31 was determined using the airport's landing rate records, which categorize aircraft activity into seven rate groups based on similar operational and performance characteristics. The Rate IV grouping was identified as the most demanding category of aircraft utilizing Runway 13-31, with 876 operations in FFY 2023 and 1,028 in FFY 2024. Based on the aircraft included in this rate grouping, the existing and future critical aircraft for Runway 13-31 is best represented by the Beechcraft King Air 350, with an AAC of B, ADG of II, and TDG of 2A.

Table 2-15 Critical Aircraft Determination

Southwest Oregon Regional Airport

	Critical Aircraft	Runway Design Code (RDC)
Runway 5-23		
Existing Critical Aircraft	Embraer ERJ-175	C-III
Future Critical Aircraft	Embraer ERJ-175	C-III
Runway 13-31		
Existing Critical Aircraft	Beechcraft King Air 350	B-II
Future Critical Aircraft	Beechcraft King Air 350	B-II

Source: Ardurra, 2025