Technical Advisory Committee (TAC)

Meeting #1 | January 28, 2025

Project Team

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Expect More. Experience Better.

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Aerial Applicator
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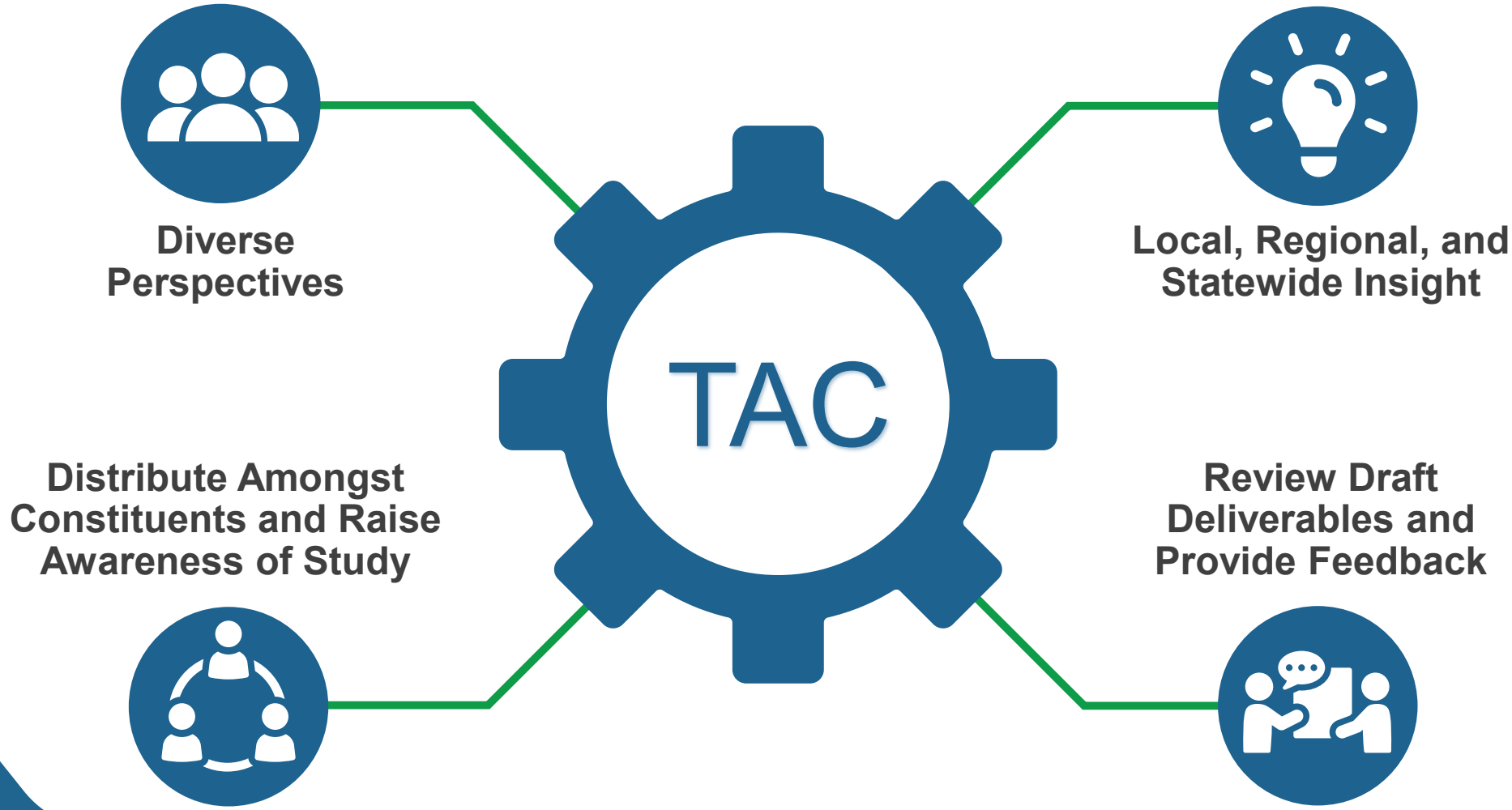
Agenda

1. Technical Advisory Committee (TAC) Role and Purpose
2. Project Overview
3. ND Aviation System Overview
4. 2025 NDSASP Update
5. 2025 NDAEIS Update
6. Next Steps

TAC Role and Purpose

TAC Role and Purpose



Project Website

Visit the site here: 2025NDSASP.com

Project Overview

Project Purpose

2025 North Dakota
State Aviation System Plan

Update to 2014 NDSASP

- Provides roadmap for long-term planning
- Guides future decision making
- Identifies system needs

2025 North Dakota
Aviation Economic Impact Study

Update to 2015 NDAEIS

- Documents contributions of public-use airports
- Justifies continued investment
- Helps communicate airport benefits and value

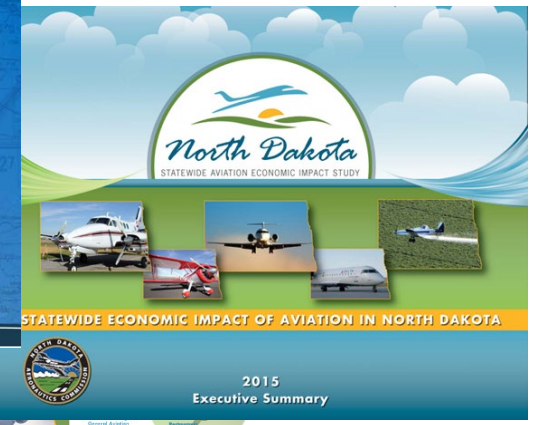
Project Timeline

Virtual TAC Meeting
Regional Presentations
Fly ND Conference

	Month	2024				2025												2026							
		S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A
Task 1	Study Design																								
Task 2	Project Management																								
Task 3	Stakeholder Engagement																								
Task 4	2025 NDSASP Framework (Goals, Performance Measures, Benchmarks)																								
Task 5	Airport Classification																								
Task 6	System Inventory																								
Task 7	Activity Forecasts																								
Task 8	System Performance																								
Task 9	Issues and Industry Advancements																								
Task 10	Recommendations and Cost Estimates based on Findings																								
Task 11	Economic Impact Study																								
Task 12	2025 NDSASP and NDAEIS Final Documents																								
Task 13	Website Story Maps and GIS Development																								

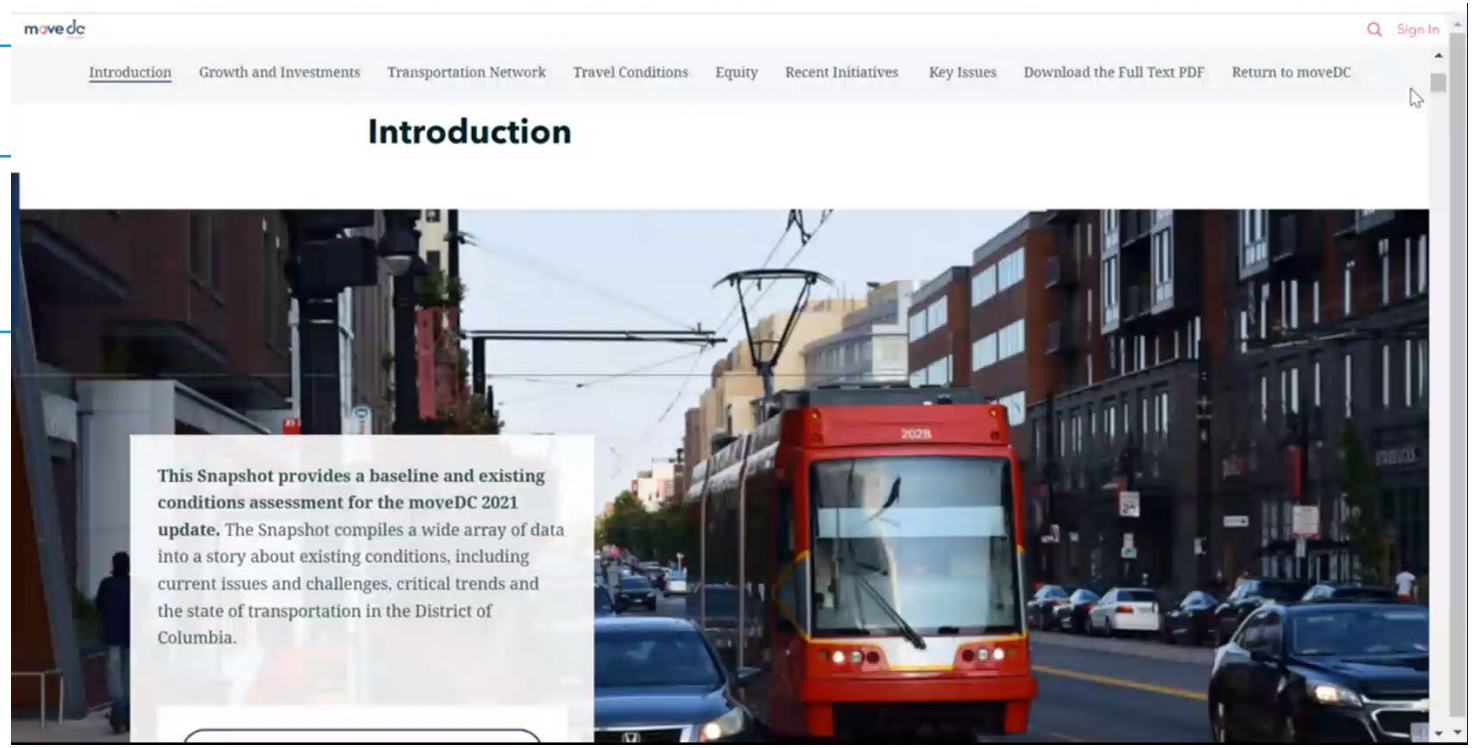
NDSASP-AEIS Deliverables

- Technical Plan
- Executive Summary
- Individual Airport Reports (65 airports)
- Fact Sheet
- Story Maps (Up to 8)



Story Maps

- **Web-based deliverable**
- **Visually presents system changes**
- **Represents several topics identified by NDAC**



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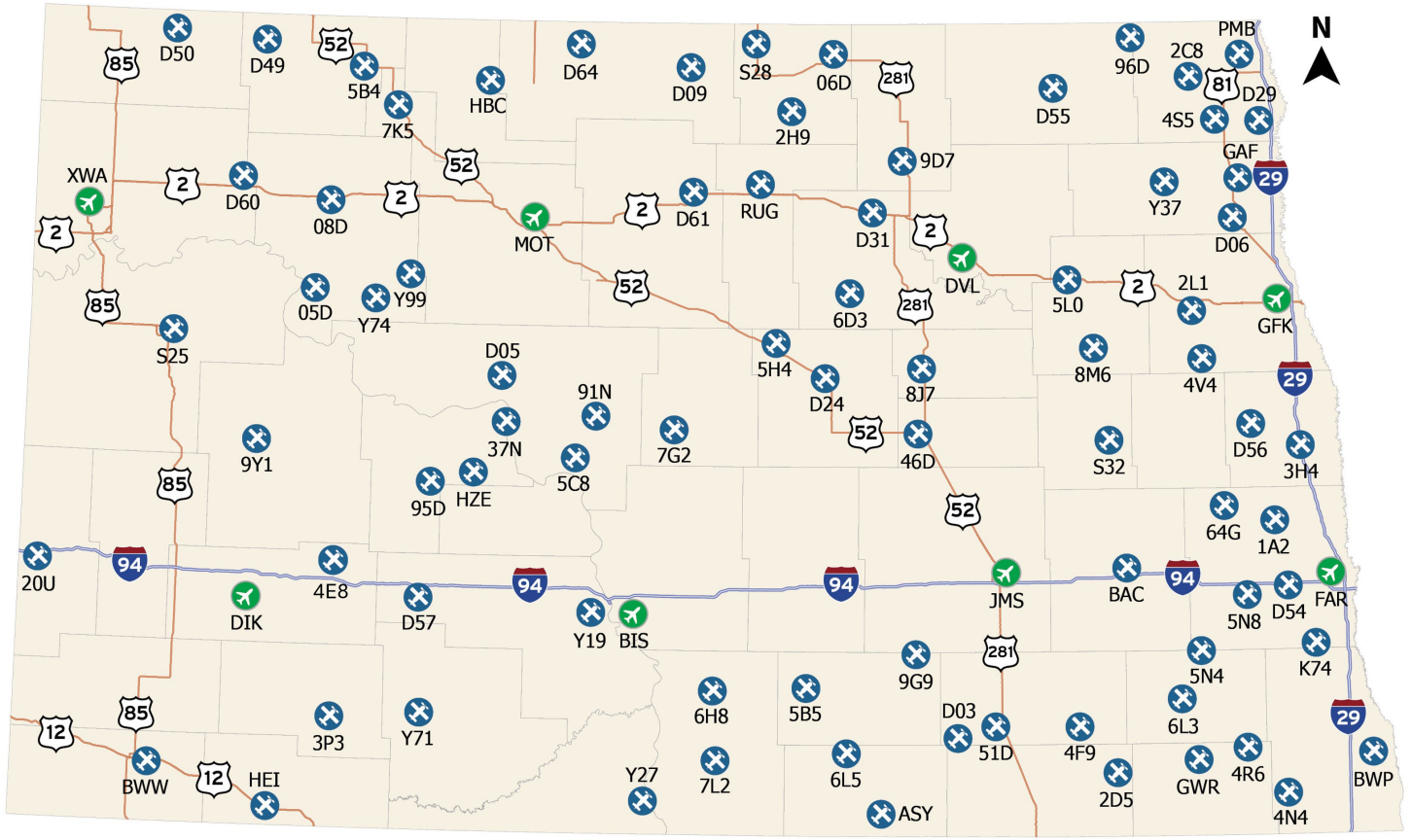
ND Aviation System Overview

Airports Included in the Study

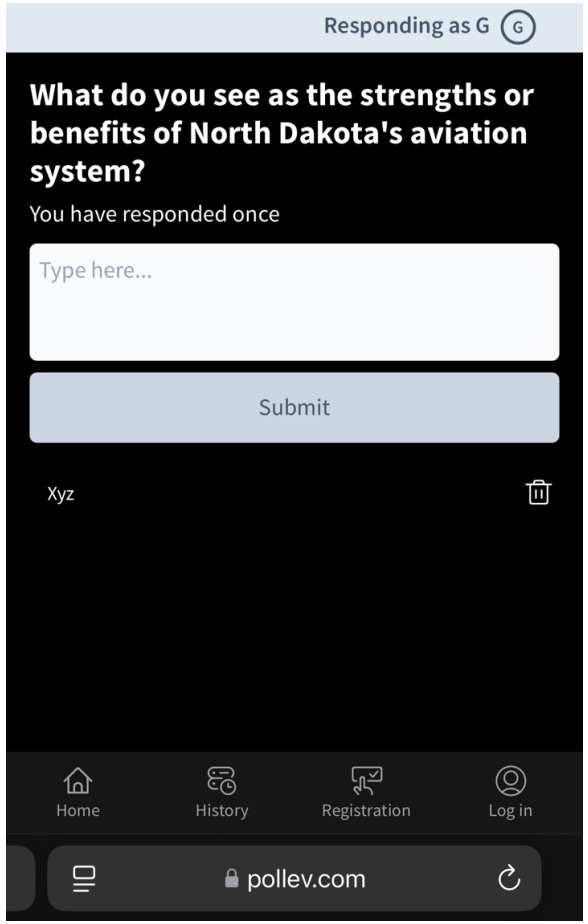


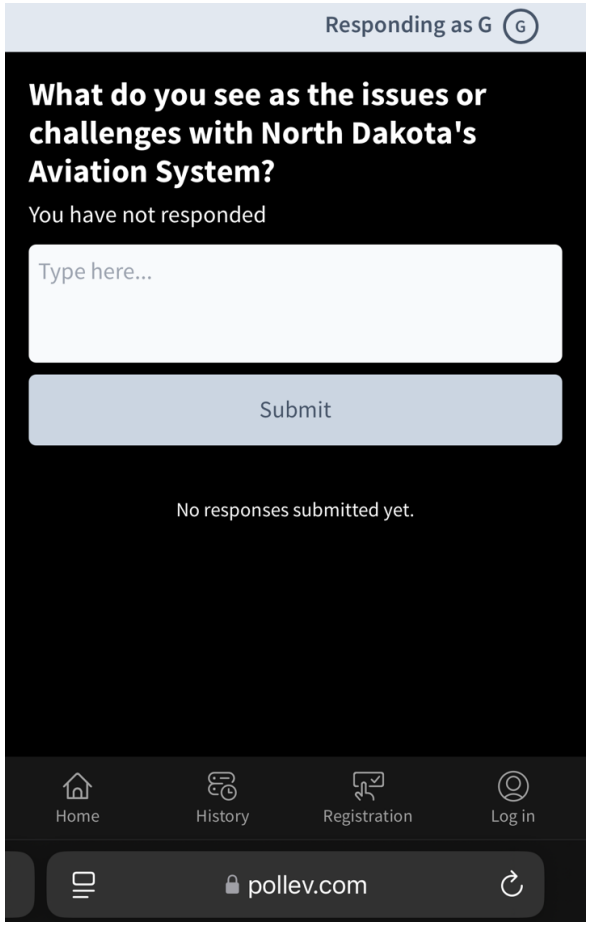
Aviation Activities in North Dakota

System Strengths and Challenges

Scan the QR code or enter the URL to provide your response!

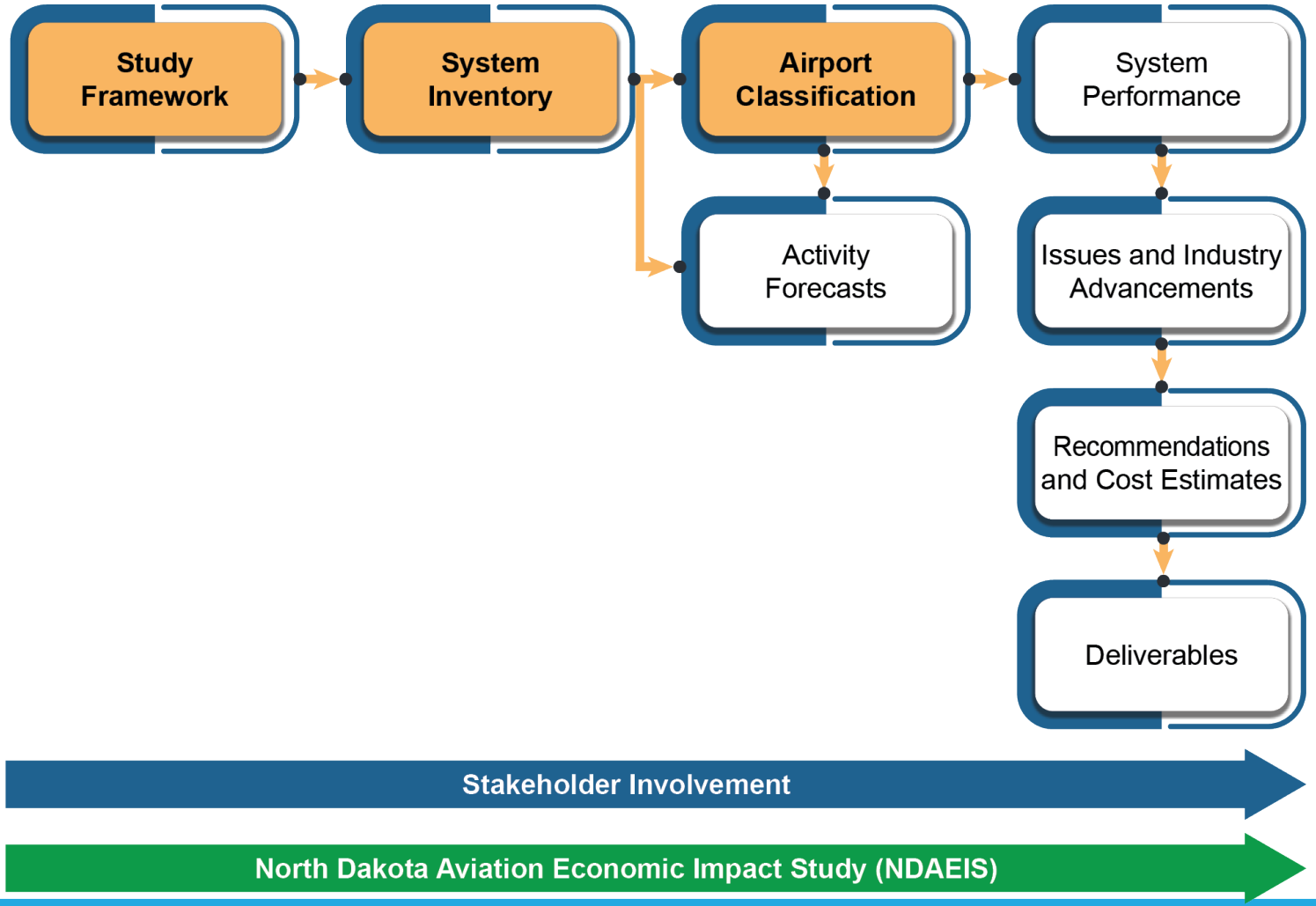
PollEv.com/georgiatwyer262



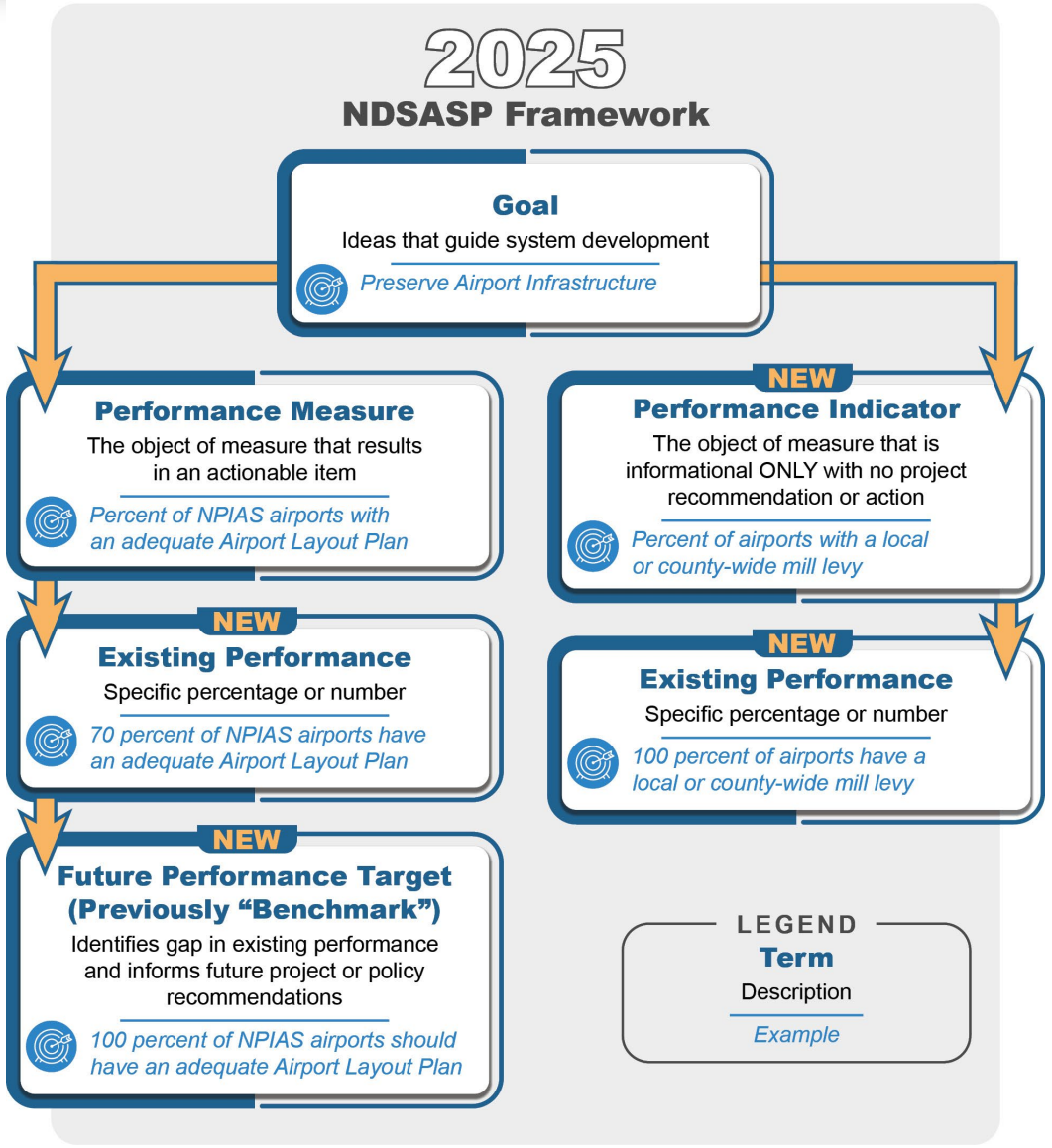


2025 NDSASP Update

Study Process and Ongoing Efforts



Study Framework



System Goals

- Maintain a Safe Aviation System
- Enhance Quality of Life
- Promote Aviation System Coverage
- Preserve Airport Infrastructure
- Provide Air Access to Airports
- Support Aviation Education and Industry Advancement

Maintain a Safe Aviation System

Metric	Metric Type
Percent of airports with clear approaches to all runway ends	Performance Measure
Percent of airports with public gatherings in the RPZs (stadiums, parks, large public or commercial buildings, parking lot, or other similar spaces) for all runway ends	
★ **Percent of airports that control RPZs through fee simple ownership or easements for all runways**	
Percent of airports with roads, railroads, or structures not utilized for public gatherings in the RPZs for all runway ends	Performance Indicator

★ = New PM or PI to the 2025 NDSASP

Promote Aviation System Coverage

Metrics	Metric Type
Percent of area and population within 90 minutes from a Commercial Service airport	Performance Indicator
Percent of area and population within 30 minutes from a NPIAS airport	
★ **Percent of area and population within 30 minutes from all paved public-use airports (NPIAS and Non-NPIAS)**	
Percent of area and population within 30 minutes from all public-use airports (NPIAS and Non-NPIAS)	

Provide Air Access to Airports

Metrics	Metric Type
Percent of area and population within 30 nautical miles of an airport with on-site weather reporting (AWOS/ASOS)	Performance Measure
Percent of area and population within 30 nautical miles of an airport with a non-precision approach	
Percent of area and population within 30 nautical miles of an airport with a vertically guided approach	
Percent of airports with adequate terminal facilities to support passenger demand	
★ **Percent of airports with available covered aircraft storage**	
★ **Percent of airports with standard runway lighting**	Performance Indicator
Percent of area and population within 50 nautical miles of an airport with Jet A fuel	
Percent of area and population within 30 nautical miles of an airport with 100LL fuel	
★ **Percent of NPIAS airports that have at least 95% wind coverage for all runways**	

Enhance Quality of Life

Metrics	Metric Type
Percent of area and population within 60 minutes of a 5,000ft or longer runway	Performance Indicator
★ **Percent of airports that meet the Light Business Jet Capability criteria**	
★ **Percent of airports utilized by air cargo operators**	
★ **Percent of airports with aviation related business tenants on airport property**	
Percent of airports that can meet the needs of the King Air emergency aircraft	
★ **Percent of area and population within 30-minutes of an airport that can meet the needs of the King Air emergency aircraft (3,800ft runway, ARC B-II Small +, lighted runway, certified weather reporting)**	
Percent of area and population within 30 nautical miles of an airport that supports based or transient aerial applicator operations	
★ **Percent of airports that provide access to mechanic services:** - **On site and available to the public** - **On-site private operation only** - **On-call only** - **None**	
Percent of airports with a hospital and/or clinic within its service area	

Preserve Airport Infrastructure

Metrics	Metric Type
Percent of airports meeting state PCI thresholds on primary runways	Performance Measure
Percent of NPIAS airports with an adequate Airport Layout Plan	
Percent of airports that have height zoning following Part 77 guidelines adopted by a local zoning board	Performance Indicator
Percent of airports with a local or county-wide mill levy	
Percent of airports with non-mill levy revenue	

Support Aviation Education and Industry Advancement

Metrics	Metric Type
★ Percent of airports that offer flight training	Performance Indicator
★ Percent of area and population within 30 nautical miles of an airport that offers flight training	
★ Percent of airports that host annual fly-ins or other community engagement events	
★ Percent of airports that participate in STEM activities (tours, classroom visits, etc.)	
★ Percent of area and population that have educational opportunities available in the community	

System Inventory

- **Airport Manager Surveys Distributed**
  - Includes NDSASP and NDAEIS questions
- **Scheduling Site Visits**
  - 81 virtual site visits
  - 8 in-person site visits

2025 North Dakota
Aviation Economic Impact Study

Economic Impact Survey

This information will be used to convey the economic importance of individual airports and the sum of all of North Dakota's public airports. Please provide as much detail as you can to assist the consulting team in data collection efforts.

Types of Aviation Activity

Please use the table below to indicate the type and frequency of different activities that your airport supports. The frequency information you provide will be used by the project team to determine your airport's top five activities.

Activity	Never	Occasional	Seasonal	Monthly	Weekly	Daily
Recreational flying	☐	☐	☐	☐	☐	☐
Flight instruction	☐	☐	☐	☐	☐	☐
Agricultural spraying	☐	☐	☐	☐	☐	☐
Corporate/business activity	☐	☐	☐	☐	☐	☐
Aerial inspections (e.g., pipeline, electrical, etc.)	☐	☐	☐	☐	☐	☐
Air cargo	☐	☐	☐	☐	☐	☐
Gateway for recreational visitors	☐	☐	☐	☐	☐	☐
Police/law enforcement	☐	☐	☐	☐	☐	☐
Prisoner transport	☐	☐	☐	☐	☐	☐
Military training	☐	☐	☐	☐	☐	☐
Search & rescue/ civil air patrol	☐	☐	☐	☐	☐	☐
Environmental patrol	☐	☐	☐	☐	☐	☐
Medevac	☐	☐	☐	☐	☐	☐
Physician/medical transport	☐	☐	☐	☐	☐	☐
Aerial firefighting	☐	☐	☐	☐	☐	☐
Aerial photography/ surveying	☐	☐	☐	☐	☐	☐
Traffic/news reporting	☐	☐	☐	☐	☐	☐
Air shows	☐	☐	☐	☐	☐	☐
Skydiving	☐	☐	☐	☐	☐	☐
Gliders/soaring	☐	☐	☐	☐	☐	☐

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2025 North Dakota
State Aviation System Plan

Airport Manager Survey for General Aviation Airports

The North Dakota Aeronautics Commission (NDAC) requests your participation in providing essential data to be used by NDAC and the consultant team, Kimley-Horn, for the 2025 North Dakota State Aviation System Plan (2025 NDSASP) and 2025 North Dakota Aviation Economic Impact Study (NDAEIS) updates.

A member of the Kimley-Horn team will be contacting your airport to schedule either a virtual or in-person site visit to discuss the Airport Manager Survey and answer any questions you may have on this form. **Please complete as much of the form as possible ahead of your scheduled site visit and return to** Georgia.Twyerould@Kimley-Horn.com. The site visit will be used to ensure a complete dataset for the study.

If you have any questions about this form or the NDSASP/NDAEIS update, please contact Adam Dillin of the North Dakota Aeronautics Commission at 701-328-9857 or via email at adillin@nd.gov or Georgia Twyerould of Kimley-Horn at 720-773-2682 or via email at Georgia.Twyerould@kimley-horn.com.

Airport Contact Information

Airport Name: _____ 3-Letter ID: _____ Date: _____

Does your airport have a dedicated on-site airport manager? YES ☐ **NO** ☐

Survey Respondent: This data request was completed by: _____ Title: _____

_____ Cell/Alternate Phone: _____ Email: _____

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Airport Classifications

- Using the 2025-2029 NPIAS
- Same Classification Methodology as 2014 NDSASP

	2025 NDSASP Classification	# of Airports
NPIAS Airports	Commercial Service	8
	Local	26
	Basic	19
Non-NPIAS Airports	Community Paved	18
	Community Turf	18
	Total	89

2025 NDAEIS Update

NDAEIS Process

Data Collection

- **On-Airport**
  - Airport Administration
  - Tenants
- **Off-Airport**
  - Visitor Spending

Data Analysis

- **Calibrate Economic Model**
- **Economic Modeling**
- **Estimation of Tax Revenues from Aviation**

Deliverables

- **Technical Plan**
- **Executive Summary**
- **Individual Airport Reports**
- **Fact Sheet**
- **GIS Story Maps**

Sources of Direct Economic Impact

On-Airport

Airport Administration

- Employment (Full and Part-Time)
- Payroll (Wages and Benefits)
- Operating Expenses
- Capital Improvements

Airport Business Tenants

- Employment (Full and Part-Time)
- Capital Improvements

Off-Airport

Visitor Spending

- Commercial Service Visitor Spending
- General Aviation Visitor Spending

Measures of Economic Impact

Jobs	Earnings	Gross Domestic Product (GDP)	Output
Total number of people employed, both full-time and part-time because of aviation	Total employment compensation, including wages and benefits, of those employed	Dollar value of final goods and services produced locally because of economic activity, not including the value of intermediate goods and services used to produce the final goods and services	Total expenditures associated with airport administration, capital projects, tenant sales of goods and services, as well as visitor spending in North Dakota's hospitality-related sectors

Categories of Economic Impact

Direct Impacts

The initial impacts occurring both on- and off-airports, involving the payroll, expenditures, and capital improvements of airports and tenants are considered direct impacts. This also includes the spending by commercial and general aviation visitors.

Multiplier Impacts

There are two distinct impacts that occur within the broader “multiplier impacts” term. The first is “indirect impacts” which occur when a portion of direct revenues is used to purchase goods and services from other businesses within a defined region. These impacts are sometimes referred to as “supplier sales.” The second is “induced impacts”, which are sometimes referred to as “income respending” and occur when employees re-spend their income earned in the defined region as a part of direct and indirect impacts.

Total Impacts

Total impacts are simply the sum of the direct and multiplier impacts (induced and indirect).

Supplemental NDAEIS Tasks

- University of North Dakota - Off Airport Activity & Impacts
- Benefits of Aircraft and Aerospace Manufacturing
- Survey of AAM and UAS Businesses Impacts
- Economic Impact from Air Force Bases
- Impact Losses as a Result of Workforce Development Issues

Next Steps

Other Upcoming Tasks

Study Framework

- Address NDAC feedback on *Chapter 1: Introduction* and *Chapter 2: Study Framework*
- Post updated Chapter 1 and 2 to the Project Website for TAC review https://2025ndsasp.com/

System Inventory

- Continue inventory and data collection efforts
- Draft System Inventory chapter

Airport Classifications

- Finalize analysis of non-NPIAS airports for potential future NPIAS inclusion
- Draft 2025 NDSASP Airport Classifications chapter

Kick-off Activity Forecasts

Kick-off System Performance

FLY-ND Conference 2025

- March 2-4, 2025
- Project team presenting on the 2025 NDSASP-AEIS

Questions?

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