Updates to the 2025 NDSASP and NDAEIS

2026 FlyND | March 9, 2026

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Expect More. Experience Better.

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Agenda

1. Project Refresher
2. Completed 2025 NDSASP Chapters
3. 10-Year System Needs and Funding Shortfall
4. Completed 2025 NDAEIS Tasks
5. Deliverables & Next Steps

Project Refresher

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

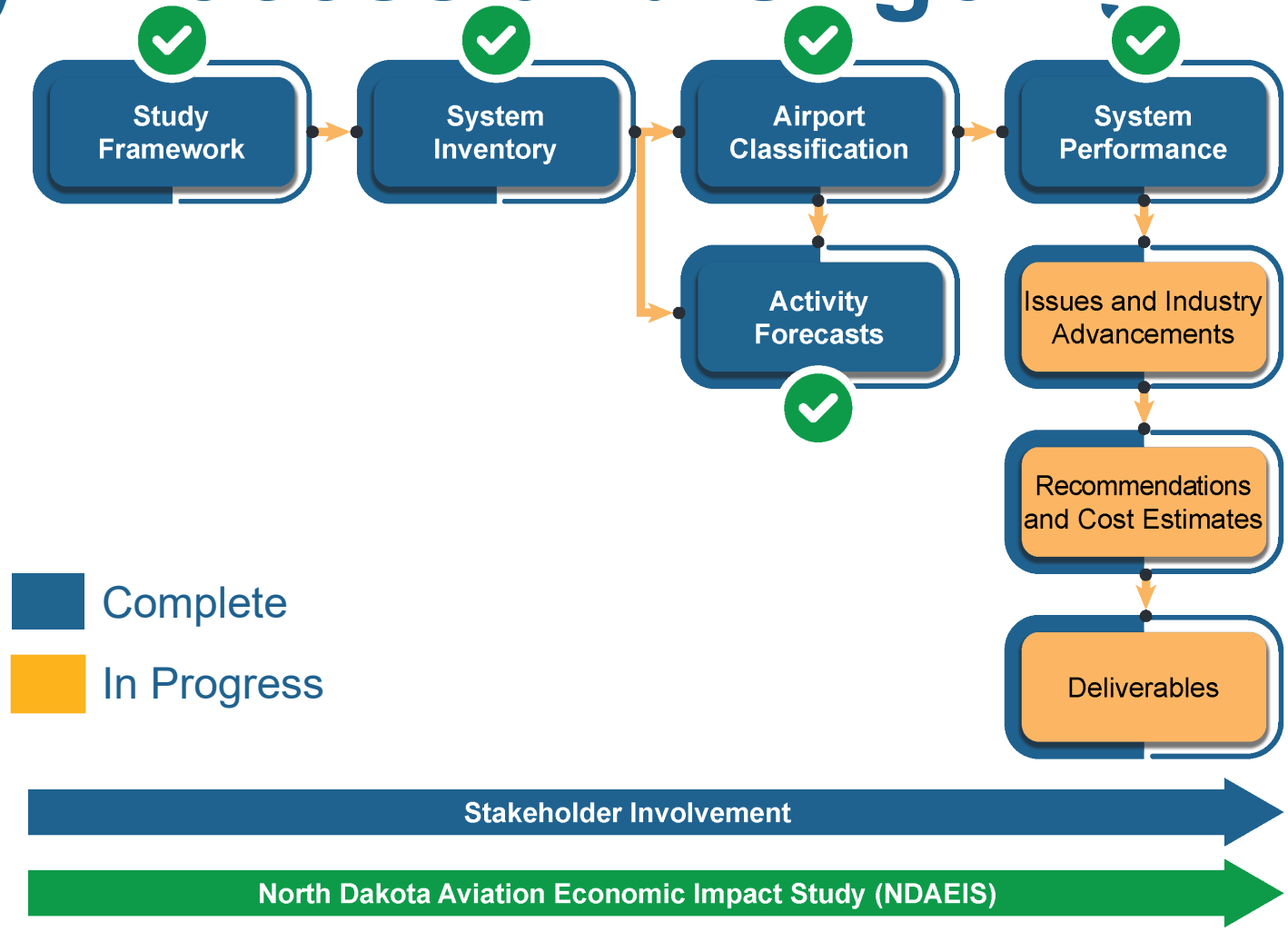
Visit the Project Website: https://2025ndsasp.com/

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																								

Study Process and Ongoing Efforts

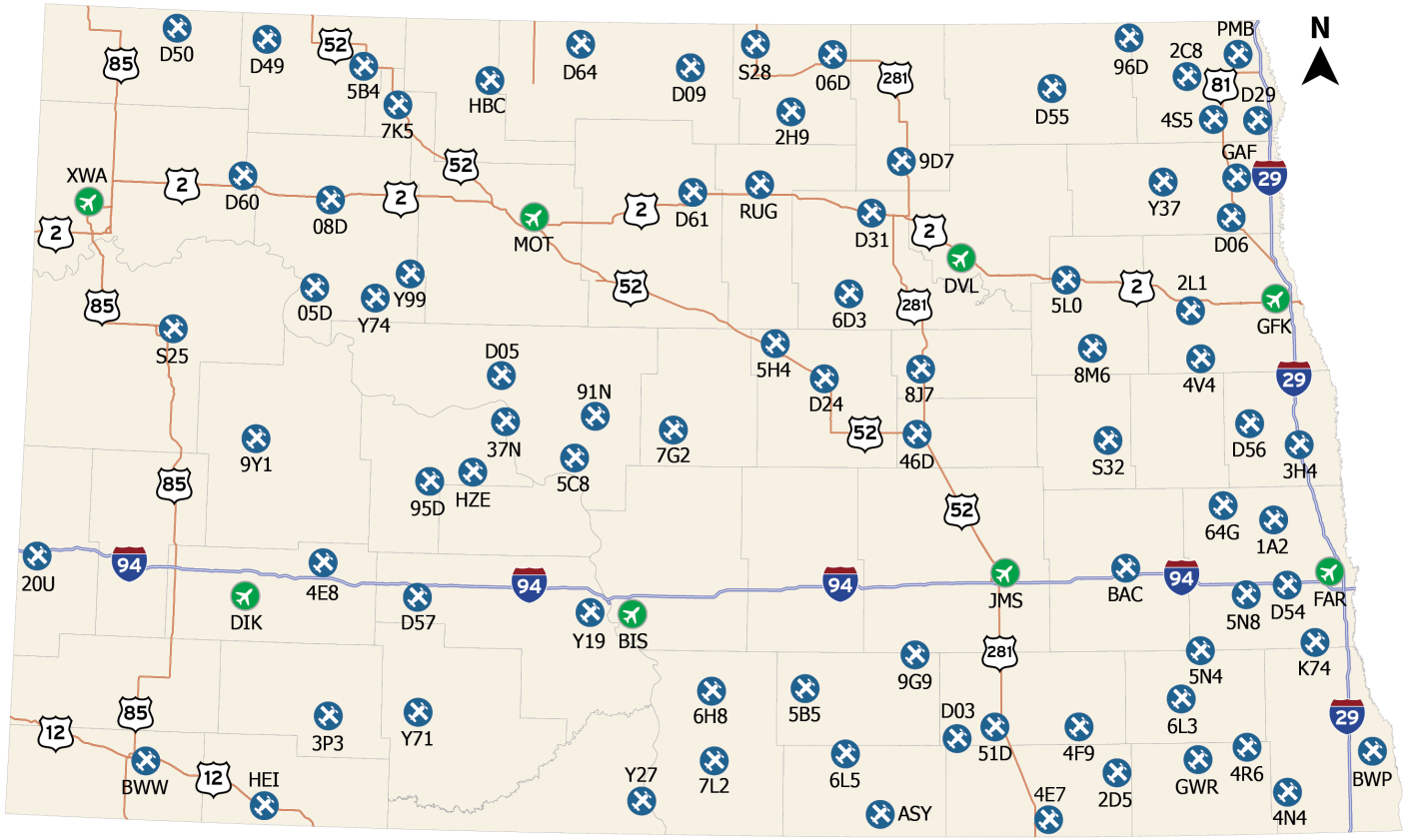


Project Website

https://2025ndsasp.com/

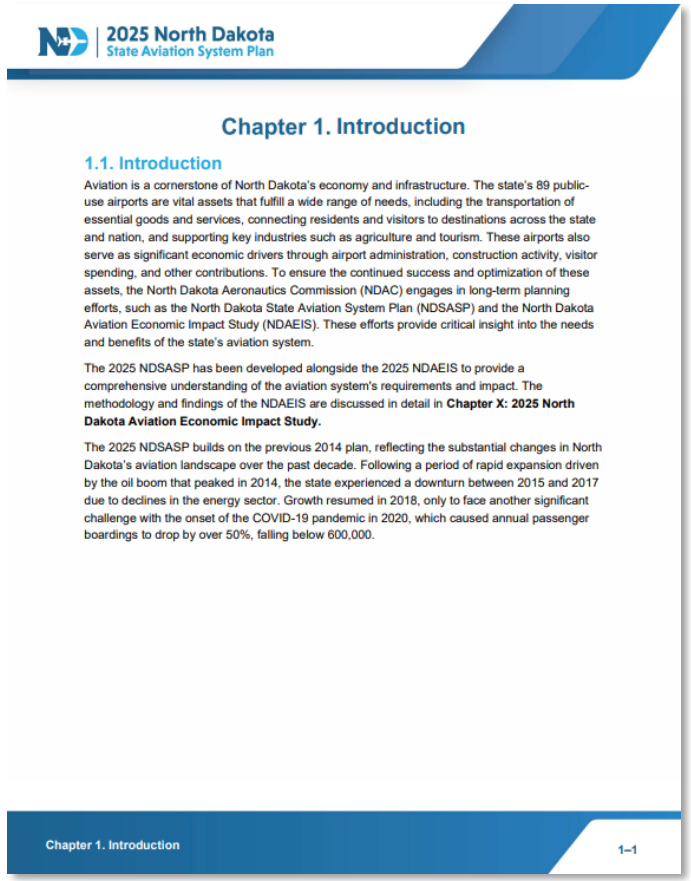
Completed 2025 NDSASP Chapters

Chapter 1. Introduction



2025 NDSASP Public Airports

Commercial Service | General Aviation | County Boundaries | State Highways | Interstate Highways



2025 North Dakota
State Aviation System Plan

Chapter 1. Introduction

1.1. Introduction

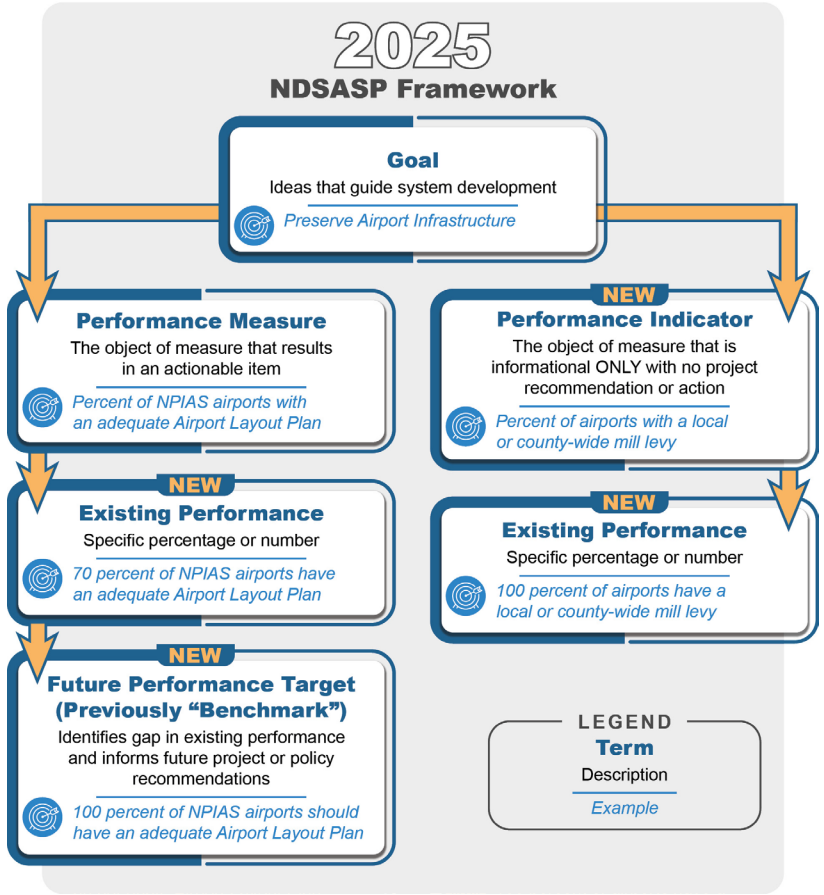
Aviation is a cornerstone of North Dakota's economy and infrastructure. The state's 89 public-use airports are vital assets that fulfill a wide range of needs, including the transportation of essential goods and services, connecting residents and visitors to destinations across the state and nation, and supporting key industries such as agriculture and tourism. These airports also serve as significant economic drivers through airport administration, construction activity, visitor spending, and other contributions. To ensure the continued success and optimization of these assets, the North Dakota Aeronautics Commission (NDAC) engages in long-term planning efforts, such as the North Dakota State Aviation System Plan (NDSASP) and the North Dakota Aviation Economic Impact Study (NDAEIS). These efforts provide critical insight into the needs and benefits of the state's aviation system.

The 2025 NDSASP has been developed alongside the 2025 NDAEIS to provide a comprehensive understanding of the aviation system's requirements and impact. The methodology and findings of the NDAEIS are discussed in detail in **Chapter X: 2025 North Dakota Aviation Economic Impact Study.**

The 2025 NDSASP builds on the previous 2014 plan, reflecting the substantial changes in North Dakota's aviation landscape over the past decade. Following a period of rapid expansion driven by the oil boom that peaked in 2014, the state experienced a downturn between 2015 and 2017 due to declines in the energy sector. Growth resumed in 2018, only to face another significant challenge with the onset of the COVID-19 pandemic in 2020, which caused annual passenger boardings to drop by over 50%, falling below 600,000.

Chapter 1. Introduction 1–1

Chapter 2. Study Framework



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

Performance Measures and Indicators

Goal: Maintain a Safe Aviation System

Percent of Airports:
- With Clear Approaches to All Runway Ends
- With Public Gatherings in the RPZs

Goal: Enhance Quality of Life

- Percent of Airports that Meet the Light Business Jet Criteria
- Percent of Area and Population within 30 minutes of Airport that can Meet the Needs of the King Air Emergency Aircraft

Goal: Promote Aviation System Coverage

Percent of Area and Population:
- Within 30 Minutes of All Public-Use Airports
- Within 30 Minutes of a NPIAS Airport

Goal: Preserve Airport Infrastructure

Percent of Airports:
- Meeting State PCI Thresholds on Primary Runways
- With an Adequate Airport Layout Plan

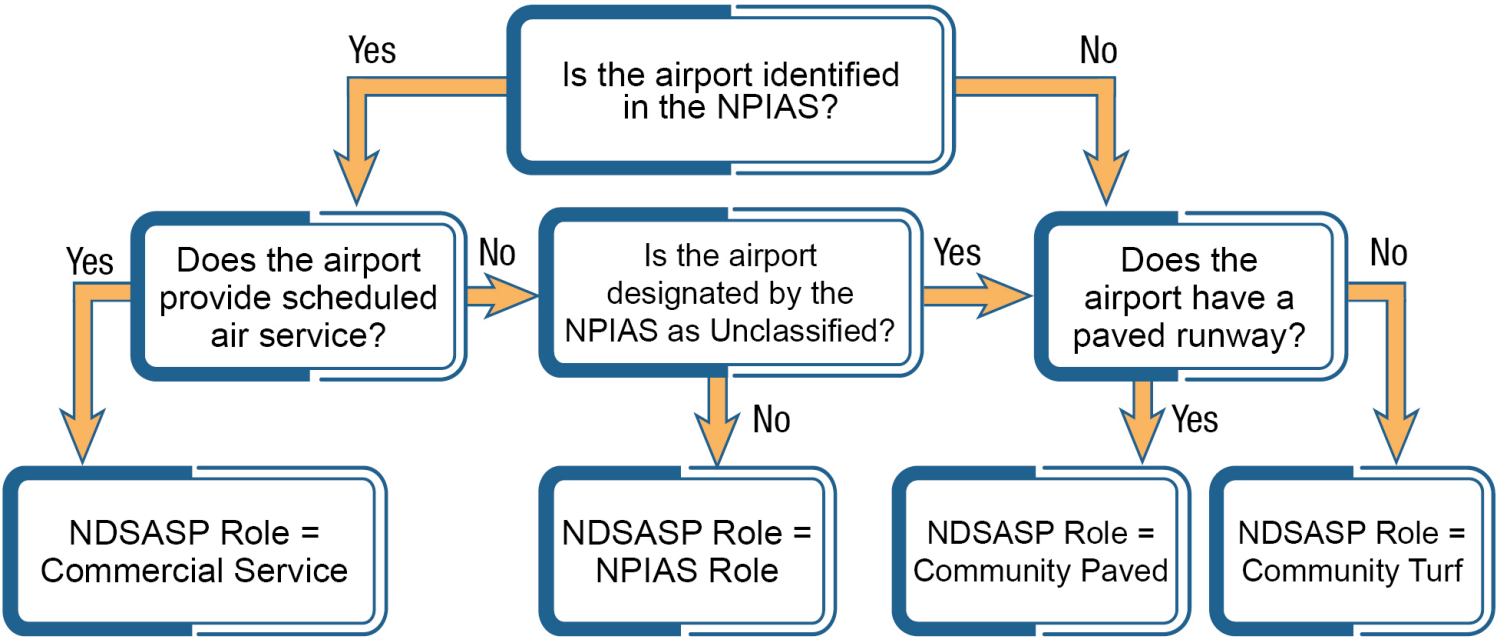
Goal: Provide Air Access to Airports

- Percent of Airports with Available Covered Aircraft Storage
- Percent of Area and Population within 30 NM of an Airport with On-Site Weather Reporting

Goal: Support Aviation Industry Advancement

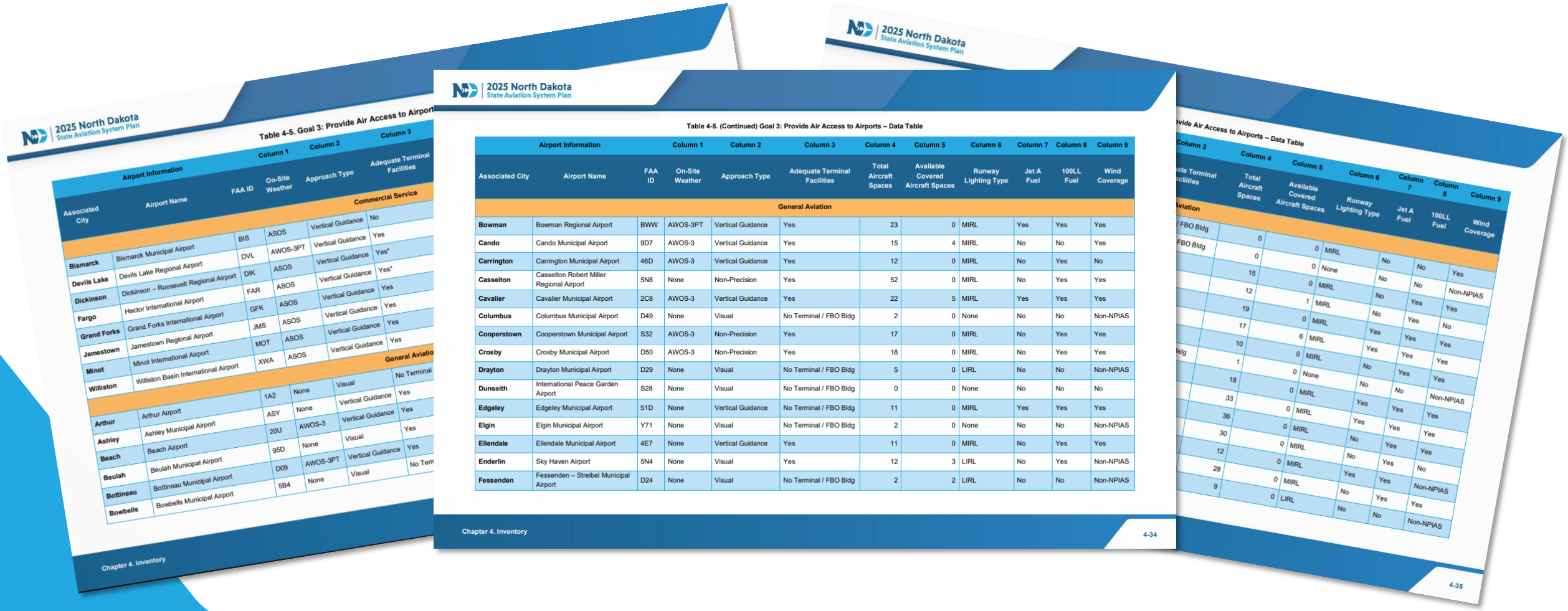
Percent of Airports:
- That Offer Flight Training
- That Participate in STEM Activities

Chapter 3. Airport Classifications



2025 NDSASP Classification	No. of System Airports
Commercial Service	8
Local	26
Basic	19
Community Paved	19
Community Turf	17

Chapter 4. Inventory



2025 North Dakota State Aviation System Plan

Table 4-5. Goal 3: Provide Air Access to Airports

Airport Information			Column 1	Column 2	Column 3
Associated City	Airport Name	FAA ID	On-Site Weather	Approach Type	Adequate Terminal Facilities
Commercial Service					
Bismarck	Bismarck Municipal Airport	BIS	ASOS	Vertical Guidance	No
Devils Lake	Devils Lake Regional Airport	DVL	AWOS-3PT	Vertical Guidance	Yes
Dickinson	Dickinson – Roosevelt Regional Airport	DIK	ASOS	Vertical Guidance	Yes*
Fargo	Hector International Airport	FAR	ASOS	Vertical Guidance	Yes*
Grand Forks	Grand Forks International Airport	GFK	ASOS	Vertical Guidance	Yes
Jamestown	Jamestown Regional Airport	JMS	ASOS	Vertical Guidance	Yes
Minot	Minot International Airport	MOT	ASOS	Vertical Guidance	Yes
Williston	Williston Basin International Airport	XWA	ASOS	Vertical Guidance	Yes
General Aviation					
Arthur	Arthur Airport	1A2	None	Visual	No Terminal
Ashley	Ashley Municipal Airport	ASY	None	Vertical Guidance	Yes
Beach	Beach Airport	20U	AWOS-3	Vertical Guidance	Yes
Beulah	Beulah Municipal Airport	95D	None	Visual	Yes
Bottineau	Bottineau Municipal Airport	D09	AWOS-3PT	Vertical Guidance	Yes
Bowbells	Bowbells Municipal Airport	5B4	None	Visual	No Ter

Chapter 4. Inventory

2025 North Dakota State Aviation System Plan

Table 4-5. (Continued) Goal 3: Provide Air Access to Airports – Data Table

Airport Information			Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7	Column 8	Column 9
Associated City	Airport Name	FAA ID	On-Site Weather	Approach Type	Adequate Terminal Facilities	Total Aircraft Spaces	Available Covered Aircraft Spaces	Runway Lighting Type	Jet A Fuel	100LL Fuel	Wind Coverage
General Aviation											
Bowman	Bowman Regional Airport	BWW	AWOS-3PT	Vertical Guidance	Yes	23	0	MIRL	Yes	Yes	Yes
Cando	Cando Municipal Airport	9D7	AWOS-3	Vertical Guidance	Yes	15	4	MIRL	No	No	Yes
Carrington	Carrington Municipal Airport	46D	AWOS-3	Vertical Guidance	Yes	12	0	MIRL	No	Yes	No
Casselton	Casselton Robert Miller Regional Airport	5N8	None	Non-Precision	Yes	52	0	MIRL	No	Yes	Yes
Cavalier	Cavalier Municipal Airport	2C8	AWOS-3	Vertical Guidance	Yes	22	5	MIRL	Yes	Yes	Yes
Columbus	Columbus Municipal Airport	D49	None	Visual	No Terminal / FBO Bldg	2	0	None	No	No	Non-NPIAS
Cooperstown	Cooperstown Municipal Airport	S32	AWOS-3	Non-Precision	Yes	17	0	MIRL	No	Yes	Yes
Crosby	Crosby Municipal Airport	D50	AWOS-3	Non-Precision	Yes	18	0	MIRL	No	Yes	Yes
Drayton	Drayton Municipal Airport	D29	None	Visual	No Terminal / FBO Bldg	5	0	LIRL	No	No	Non-NPIAS
Dunseith	International Peace Garden Airport	S28	None	Visual	No Terminal / FBO Bldg	0	0	None	No	No	No
Edgeley	Edgeley Municipal Airport	51D	None	Vertical Guidance	No Terminal / FBO Bldg	11	0	MIRL	Yes	Yes	Yes
Elgin	Elgin Municipal Airport	Y71	None	Visual	No Terminal / FBO Bldg	2	0	None	No	No	Non-NPIAS
Ellendale	Ellendale Municipal Airport	4E7	None	Vertical Guidance	Yes	11	0	MIRL	No	Yes	Yes
Enderlin	Sky Haven Airport	5N4	None	Visual	Yes	12	3	LIRL	No	Yes	Non-NPIAS
Fessenden	Fessenden – Streibel Municipal Airport	D24	None	Visual	No Terminal / FBO Bldg	2	2	LIRL	No	No	Non-NPIAS

Chapter 4. Inventory 4-34

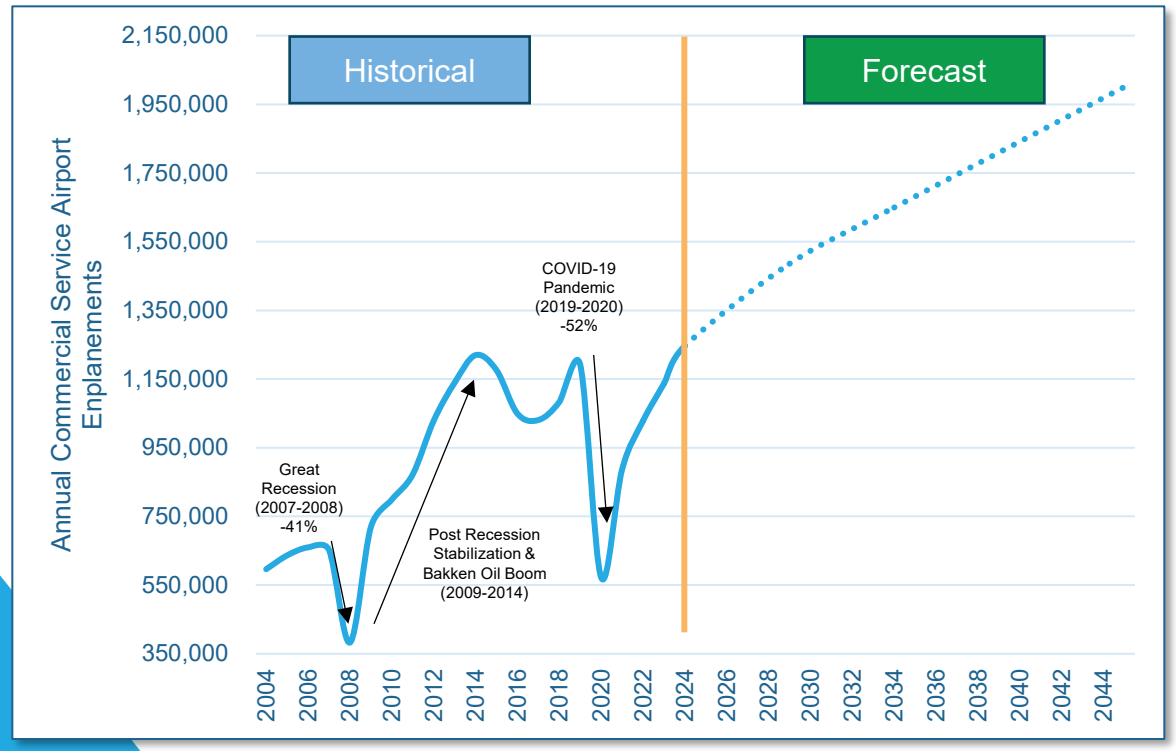
2025 North Dakota State Aviation System Plan

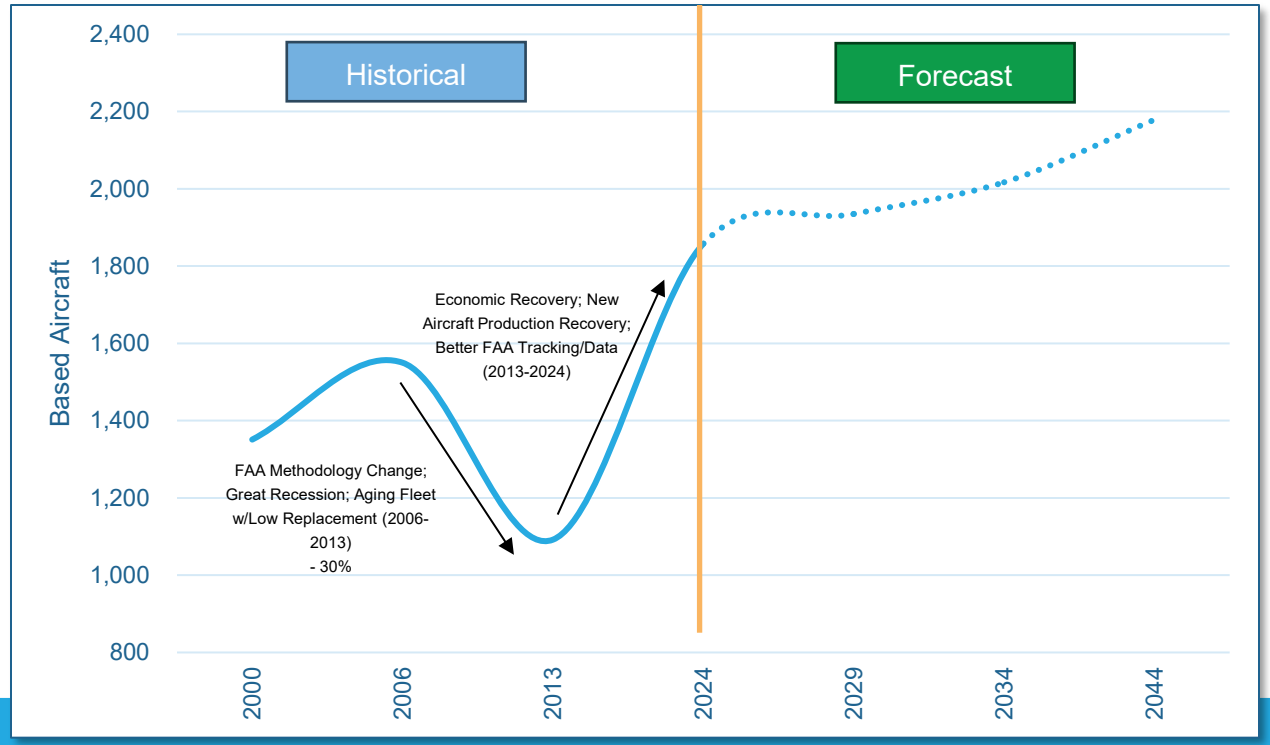
ovide Air Access to Airports – Data Table

Column 3	Column 4	Column 5	Column 6	Column 7	Column 8	Column 9
ate Terminal cilities	Total Aircraft Spaces	Available Covered Aircraft Spaces	Runway Lighting Type	Jet A Fuel	100LL Fuel	Wind Coverage
viation						
/ FBO Bldg	0	0	MIRL	No	No	Yes
FBO Bldg	0	0	None	No	No	Non-NPIAS
	15	0	MIRL	No	Yes	Yes
	12	1	MIRL	No	Yes	No
	19	0	MIRL	Yes	Yes	Yes
	17	6	MIRL	Yes	Yes	Yes
ldg	10	0	MIRL	No	Yes	Yes
	1	0	None	No	No	Non-NPIAS
	18	0	MIRL	Yes	Yes	Yes
	33	0	MIRL	Yes	Yes	Yes
	36	0	MIRL	No	Yes	Yes
	30	0	MIRL	No	Yes	No
	12	0	MIRL	Yes	Yes	Non-NPIAS
	28	0	MIRL	No	Yes	Yes
	9	0	LIRL	No	No	Non-NPIAS

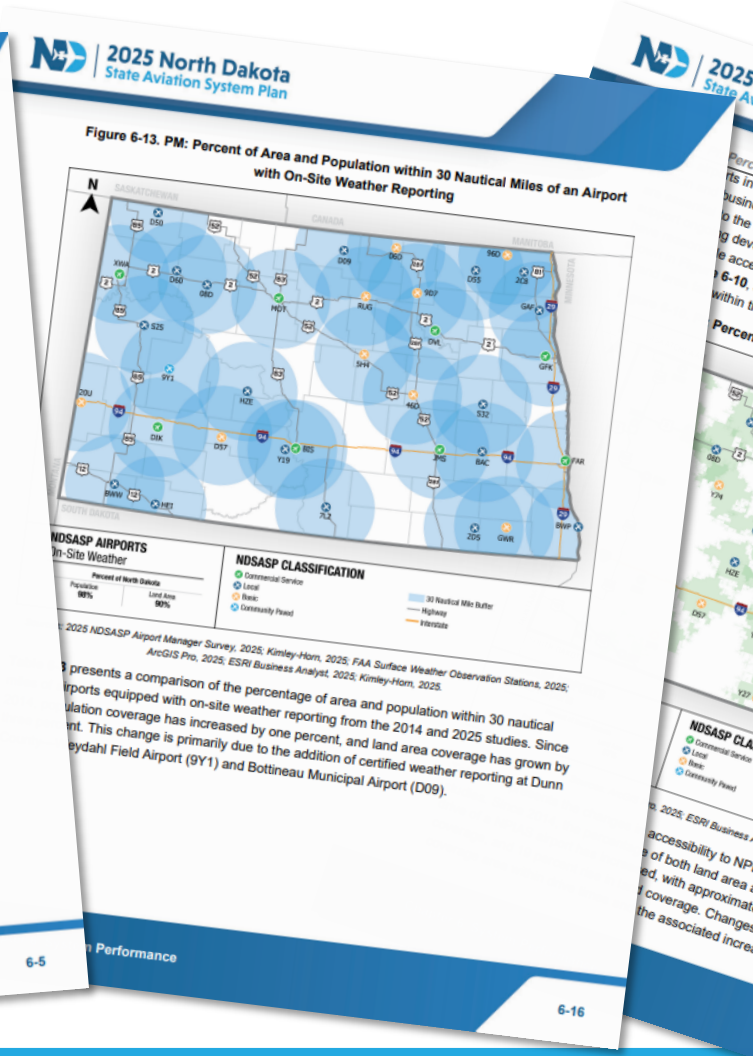
4-35

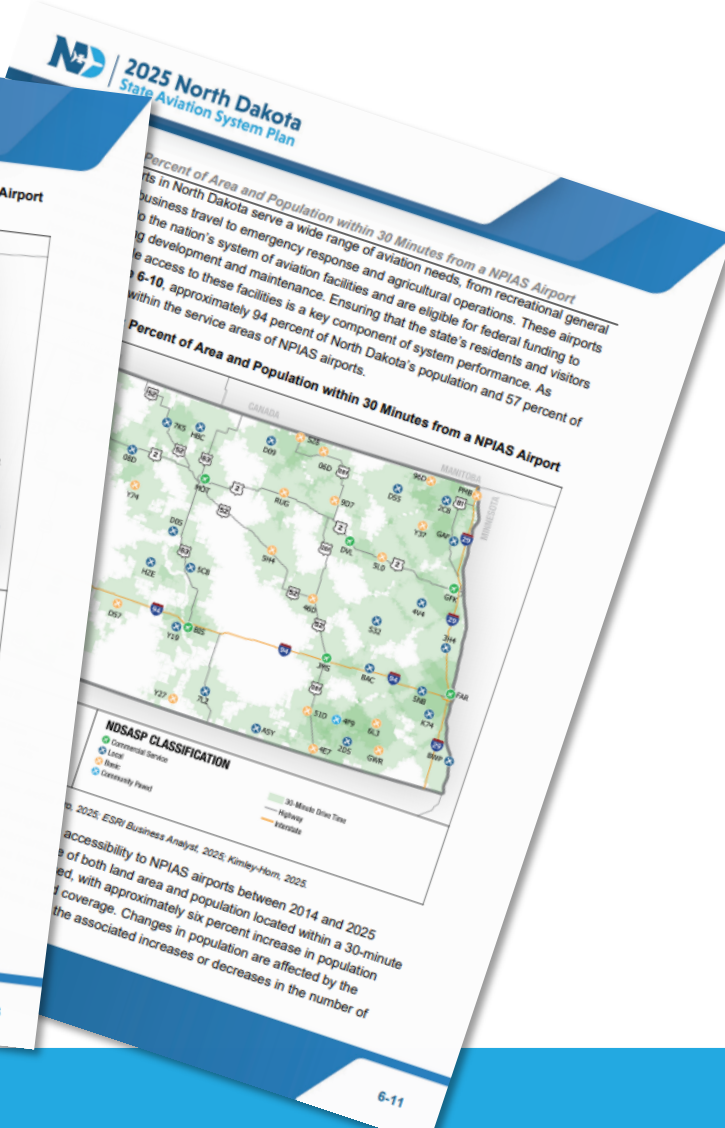
Chapter 5. Projections of Aviation Demand





Chapter 6. System Performance

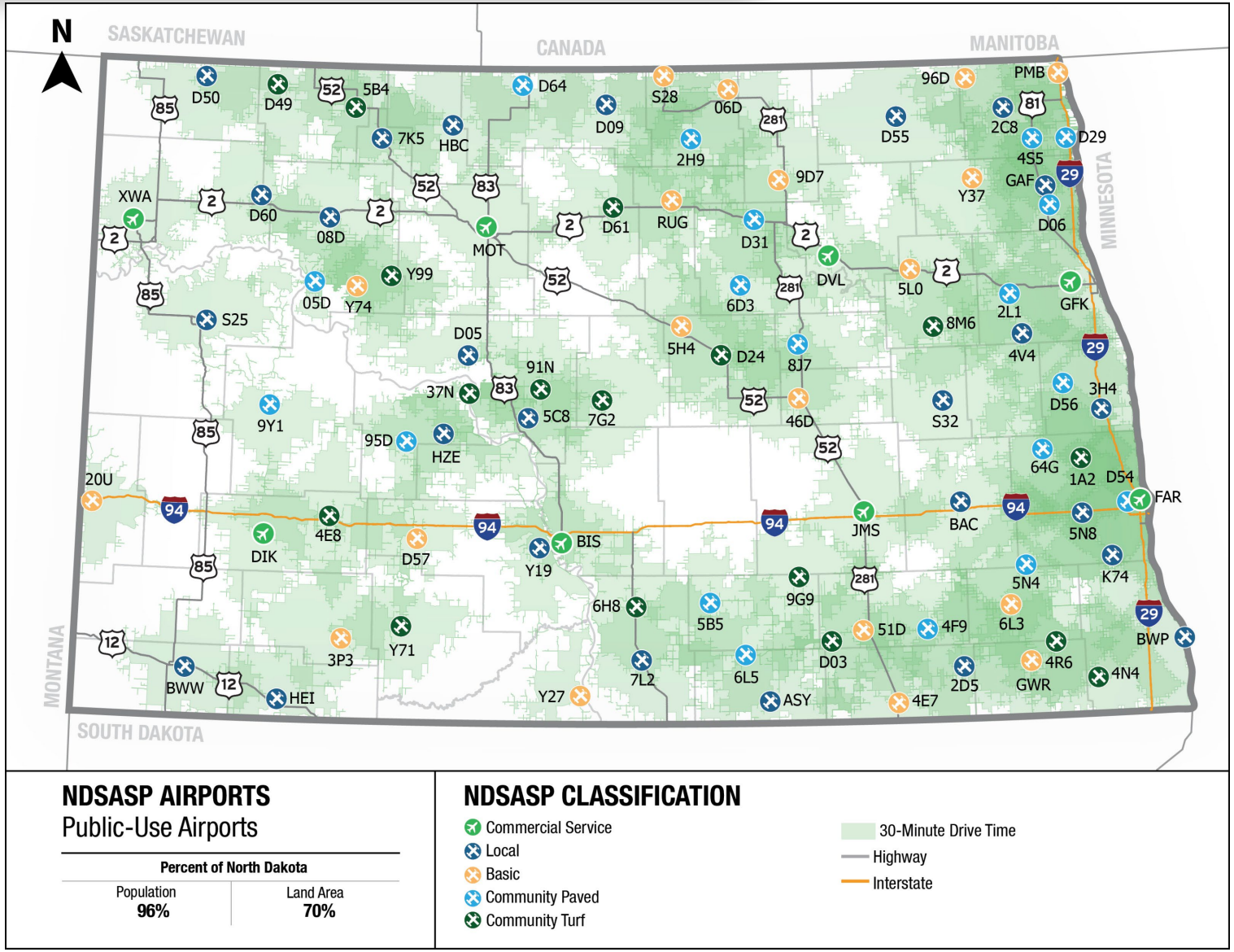




Promote Aviation System Coverage

PI: Percent of Area and Population Within 30 Minutes of All Public-Use Airports

Year	Population Coverage	Land Area Coverage
2014	93%	58%
2025	**96%**	**70%**
Δ	+3%	+12%



NDSASP AIRPORTS
Public-Use Airports

Percent of North Dakota	
Population	Land Area
96%	**70%**

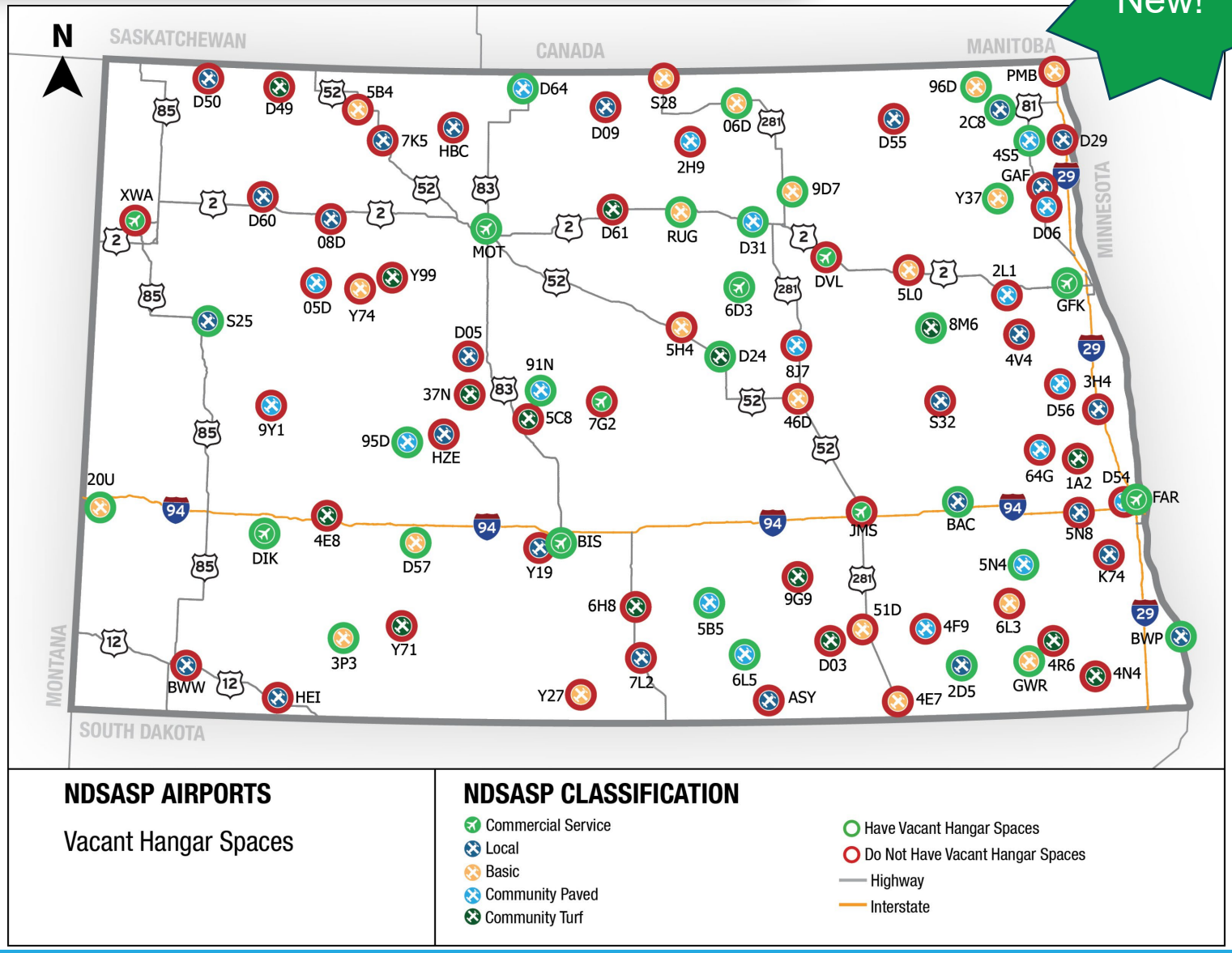
NDSASP CLASSIFICATION

- Commercial Service
- Local
- Basic
- Community Paved
- Community Turf
- 30-Minute Drive Time
- Highway
- Interstate

New!

Provide Air Access to Airports

PM: Percent of Airports With Available Covered Aircraft Storage



NDSASP AIRPORTS

Vacant Hangar Spaces

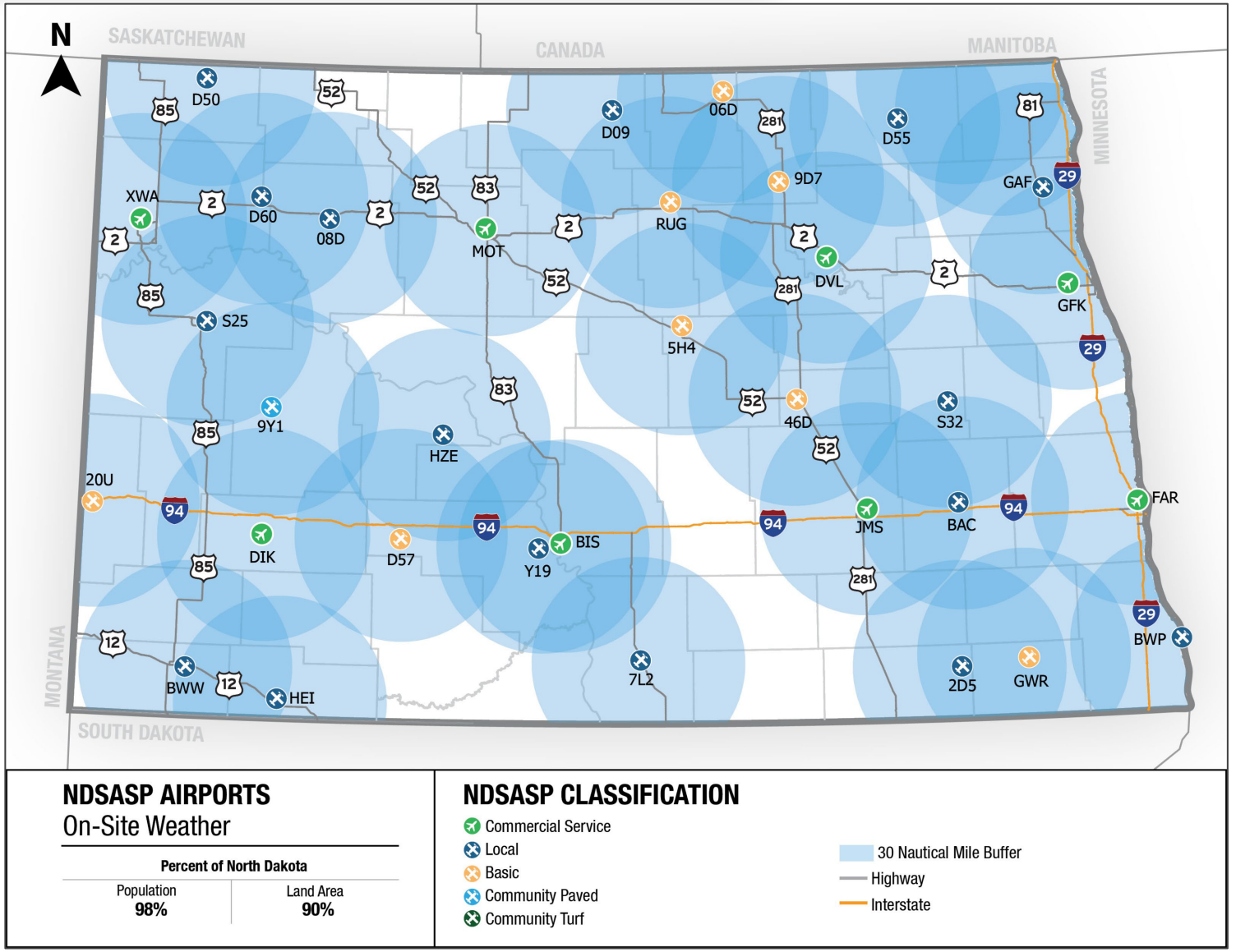
NDSASP CLASSIFICATION

- Commercial Service
- Local
- Basic
- Community Paved
- Community Turf
- Have Vacant Hangar Spaces
- Do Not Have Vacant Hangar Spaces
- Highway
- Interstate

Provide Air Access to Airports

PM: Percent of Area and Population within 30 Nautical Miles of an Airport With On-Site Weather Reporting (AWOS/ASOS)

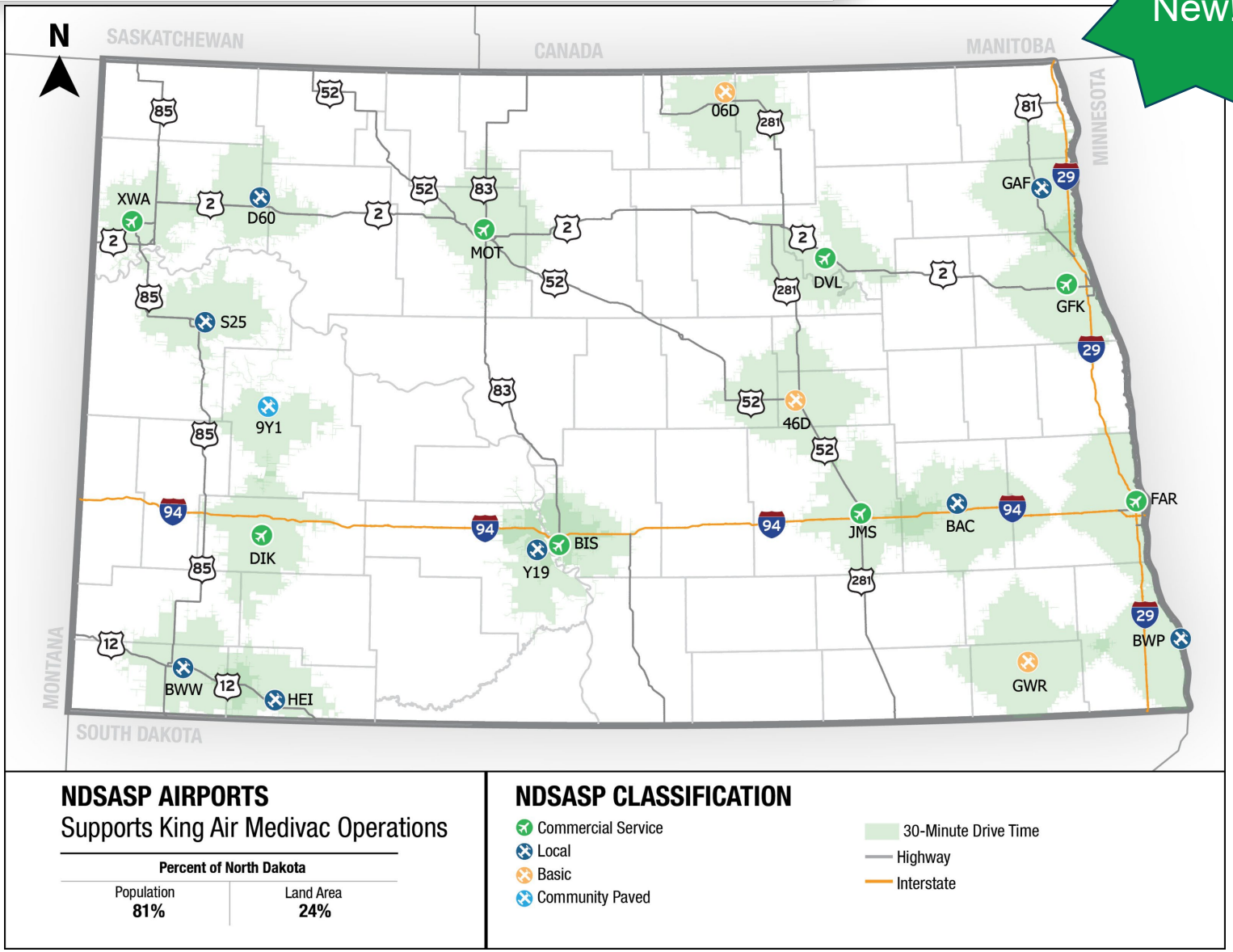
Year	Population Coverage	Land Area Coverage
2014	97%	87%
2025	**98%**	**90%**
Δ	+1%	+3%



New!

Enhance Quality of Life

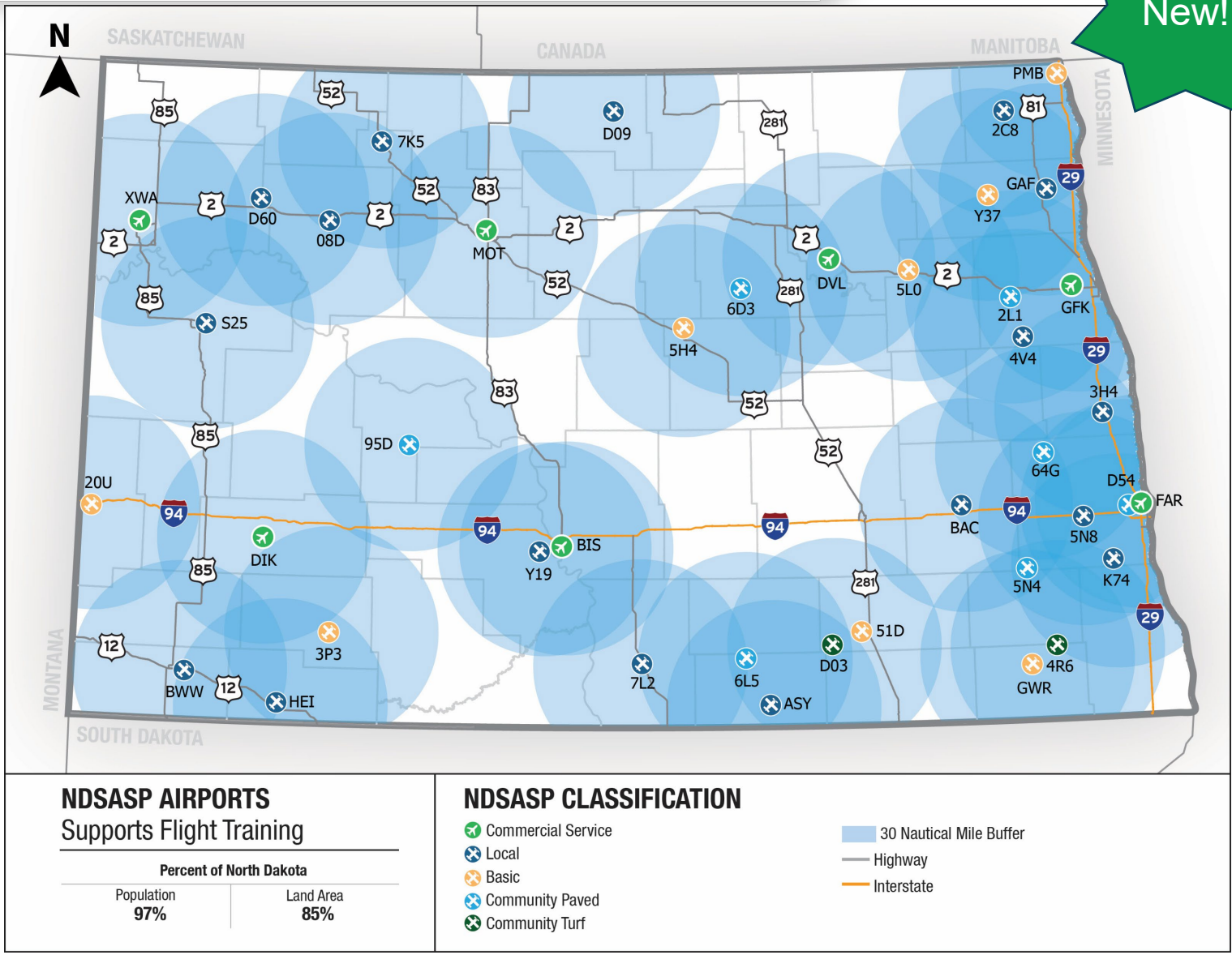
PI: Percent of Area and Population Within 30 Minutes of an Airport That Can Meet the Needs of the King Air Emergency Aircraft



Support Aviation Education and Industry Advancement

PI: Percent of Airports That Offer Flight Training

New!



Chapter 7. Issues and Industry Advancements*

- Advanced Air Mobility
- Emerging Aviation Fuel Sources
- Air Traffic Control Modernization
- Aging Fleet and Pilot Population
- Aviation Professional Shortage
- Commercial Service Access
- Economic Conditions and Impact on Buying Power
- Revenue Producing Projects

**Currently underdoing internal review. Will be posted to the project website soon!*

Chapter 8. Recommendations and Cost Estimates

- Provide a clear summary of recommended projects needed to support the statewide aviation system.
- Outline the planning-level cost estimates to meet NDSASP and airport goals.
- Establish a transparent basis for comparing needs against anticipated funding.
- Help decision-makers understand the investments required to meet future system needs.

**Currently underdoing internal review. Will be posted to the project website soon!*

10-Year System Needs and Funding Shortfall

Estimating Needs Over 10 Years (2026-2035)

NDAC's 10-year CIP

- Includes all estimated project needs at public-use airports
- Accounts for capital improvement and maintenance projects
- Prepared annually by NDAC

+

Additional NDSASP Projects

- Additional needs identified through the NDSASP analyses
- Costs developed based on similar projects identified in the CIP
- Estimates total financial needs to satisfy NDSASP goals

=

Estimated 10-year Needs

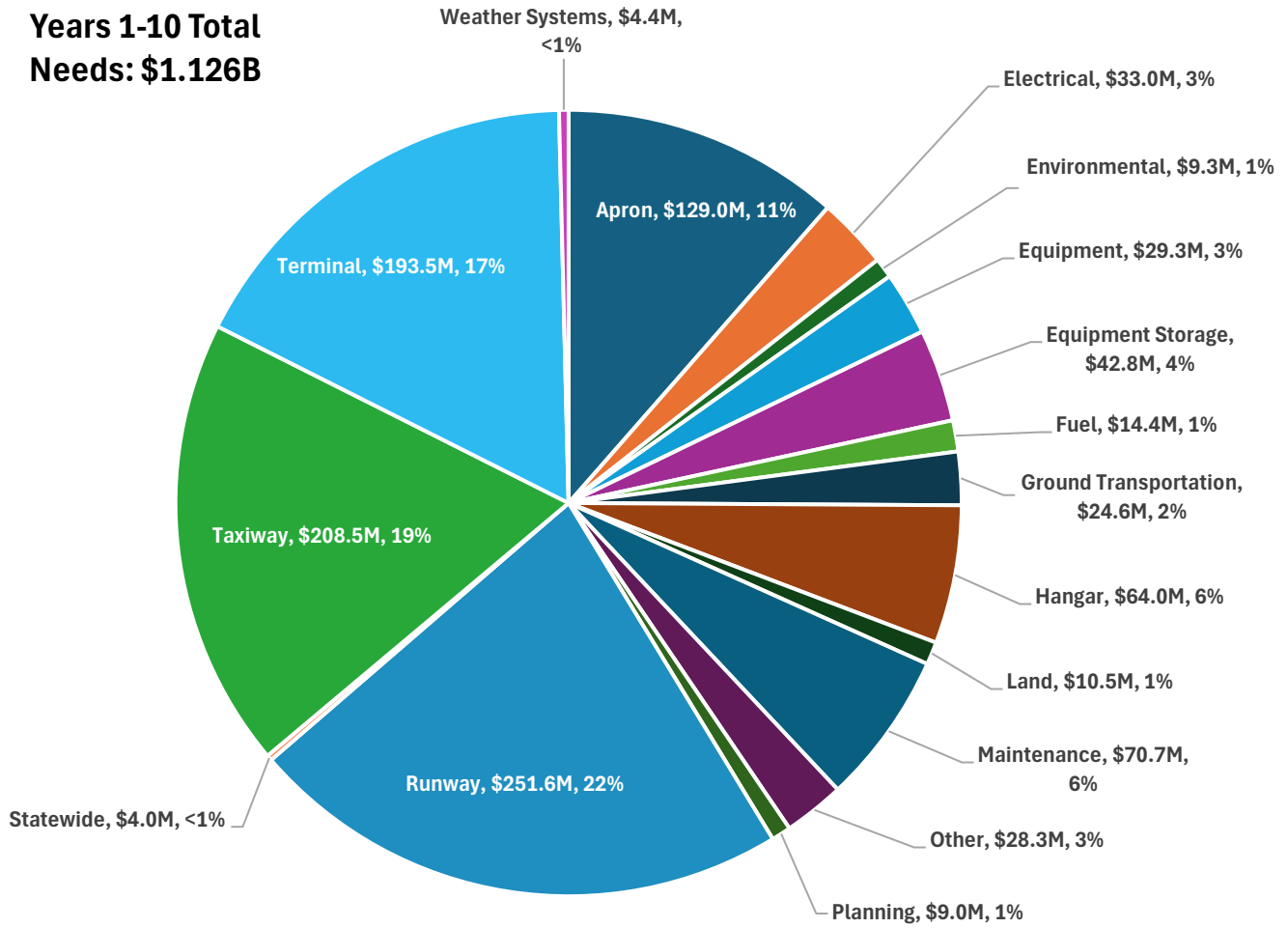
- Sum of CIP needs and additional NDSASP projects
- Duplicate projects removed to avoid double-counting
- Needs are likely much higher when considering a 20-year timeframe

North Dakota CIP Totals (2026-2035)

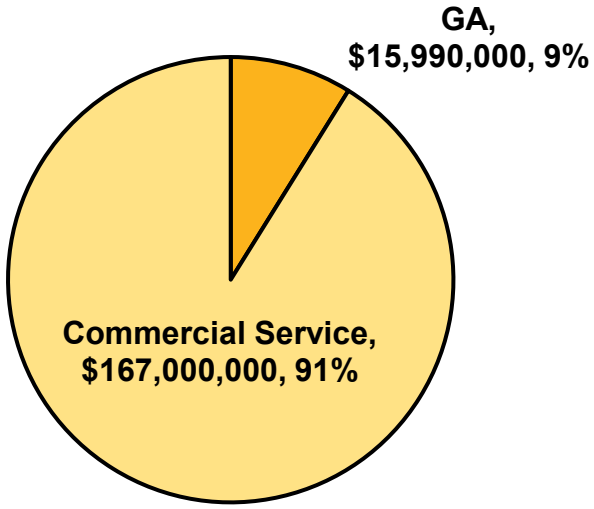
GA vs. CS 1-10 Year Total		
CS	$697,000,000	62%
GA	$425,780,000	38%
Statewide	$4,000,000	<1%
Total	**$1,126,780,000**	**100%**

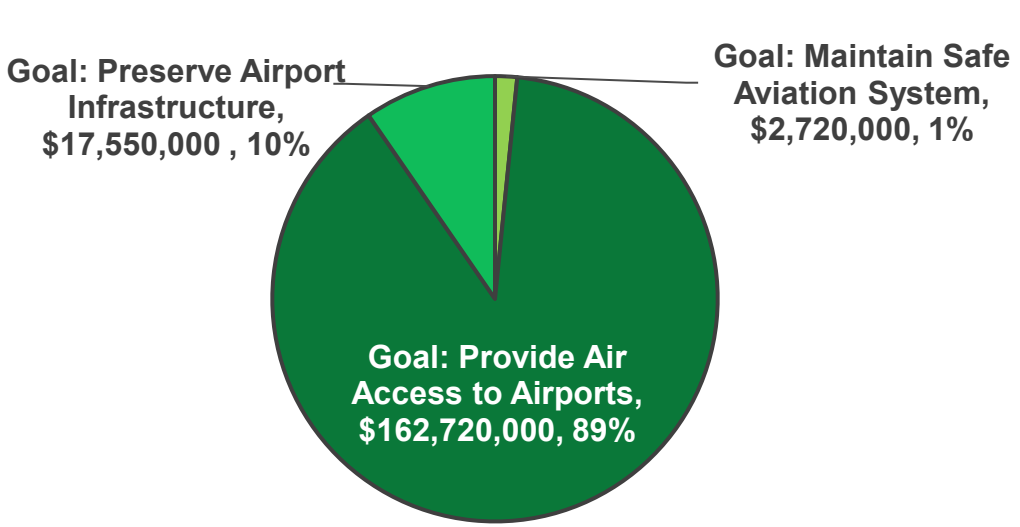
NPIAS vs. Non-NPIAS 1-10 Year Total		
NPIAS	$1,093,130,000	97%
Non-NPIAS	$29,650,000	3%
Statewide	$4,000,000	<1%
Total	**$1,126,780,000**	**100%**

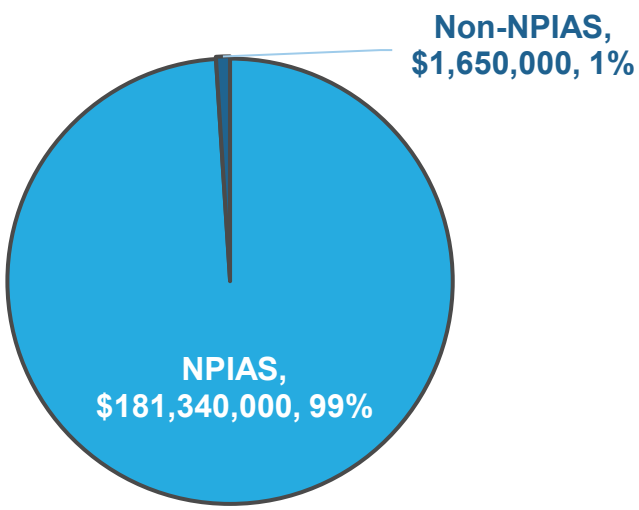
Years 1-10 Total Needs: $1.126B



Combined NDSASP Needs





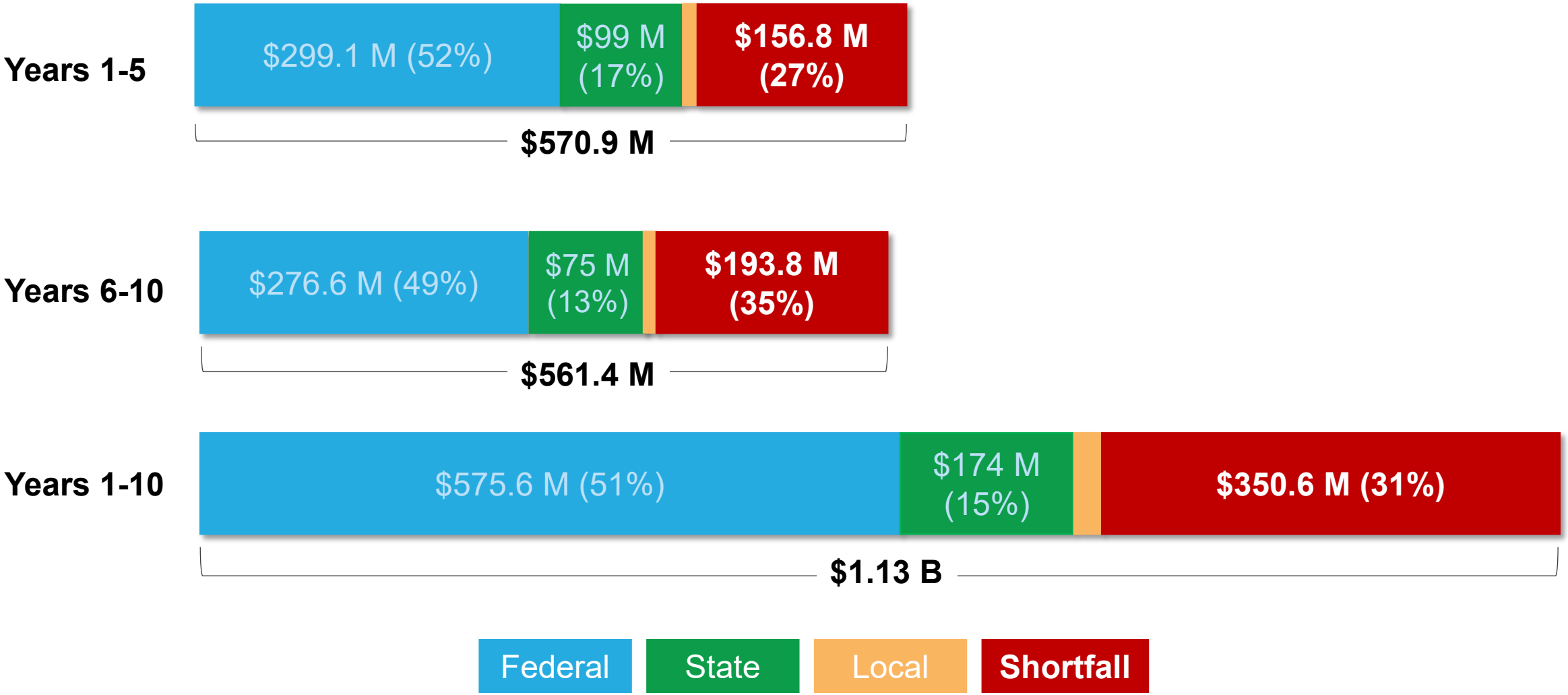


Total Costs to Meet System Plan Goals	
SASP	$5,500,000
SASP-related CIP Projects	$177,490,000
Total	**$182,990,000**

Total Needs Over 10 Years (2026-2035)

NDAC's 10-year CIP		Additional NDSASP Projects		Estimated 10-year Needs
$1.126 Billion	+	$5.5 million	=	$1.132 billion

Anticipated Funding Shortfall



Completed 2025 NDAEIS Tasks

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**

Measures of Economic Impact

Jobs

Total **number of people employed**, both full-time and part-time because of aviation

Payroll

Total **employment compensation**, including wages and benefits, of those employed

Value Added

The **dollar value of final goods and services produced** within the local area because of economic activity, **excluding the value of intermediate goods and services** used in their production.

Output

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.

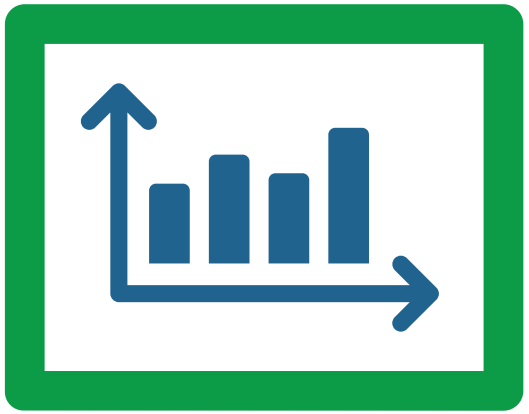
Multiplier Impacts

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 re-spending" 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).

Using IMPLAN



1. Fills in Gaps in Dataset

2. Derives Multiplier Impacts

Sources of Economic Activity

Core Impacts		Supplemental Impacts
On-Airport Impacts	Airport Administration	Grand Forks and Minot Air Force Bases
	Business Tenants	Aircraft/Aerospace Manufacturing
	Capital Expenditures	UAS Businesses
Off-Airport Impacts	Commercial Service Visitor Spending	Off-Airport UND School of Aerospace Sciences
	General Aviation Visitor Spending	Economic Impact Loss of Workforce Development Challenges

Overview of Data Collected

185
Airport Tenant Businesses Surveyed

Accounting for ~3,000 Employees!

Over **1,000**
Visitors Surveyed

12 MILLION
In tenant capital Improvements recorded

Workforce Needs

Mechanics

Customer Service

Avionic Technicians

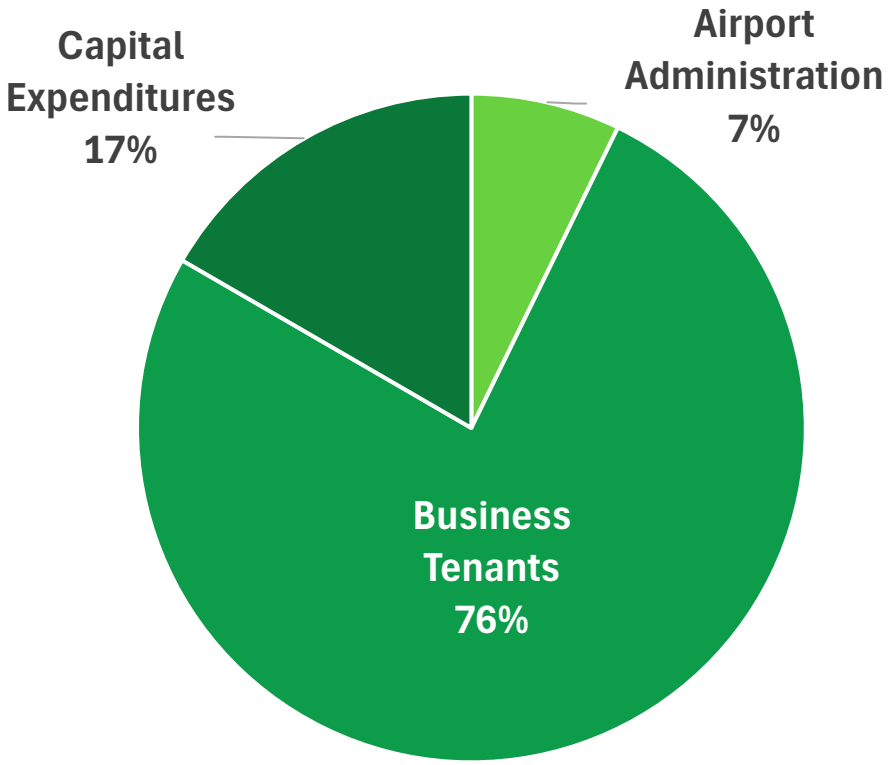
Sales

Ground Support

Core Impacts – 2025 On-Airport Impacts

Category	Jobs	Payroll	Value Added	Output
Direct	5,312	$372,439,000	$465,117,000	$658,989,000
Multiplier	2,353	$145,510,000	$236,328,000	$437,479,000
Total	7,665	$517,948,000	$701,445,000	$1,096,467,000

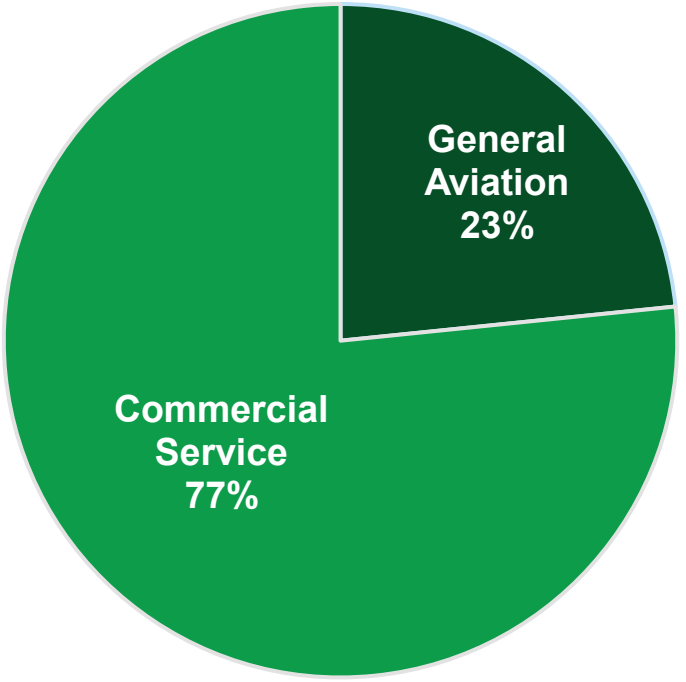
Notes: Dollar values were rounded to the nearest 1,000. Totals may not sum due to rounding.



Core Impacts – Off-Airport Impacts

Category	Jobs	Payroll	Value Added	Output
Direct	4,518	$150,182,000	$242,494,000	$435,926,000
Multiplier	1,454	$82,682,000	$133,187,000	$258,492,000
Total	**5,972**	**$232,864,000**	**$375,681,000**	**$694,418,000**

Notes: Dollar values were rounded to the nearest 1,000. Totals may not sum due to rounding.



Commercial Service Passenger Feedback

Absolutely critical. A viable airport is important to a community's growth.

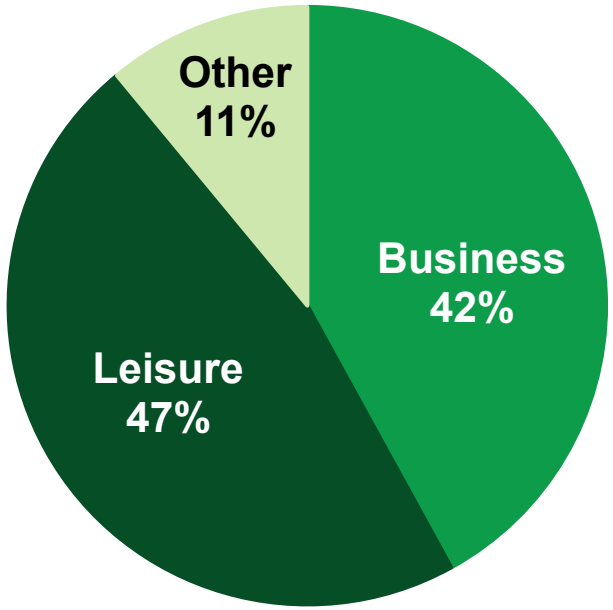
I could not live and work here without this airport!

Airports are IMPERATIVE! They bring in new businesses and more people with them.

All airports in ND are important!

90% **Reported positive experiences flying into ND airports!**

Reason for Travel



Suggested Improvements:

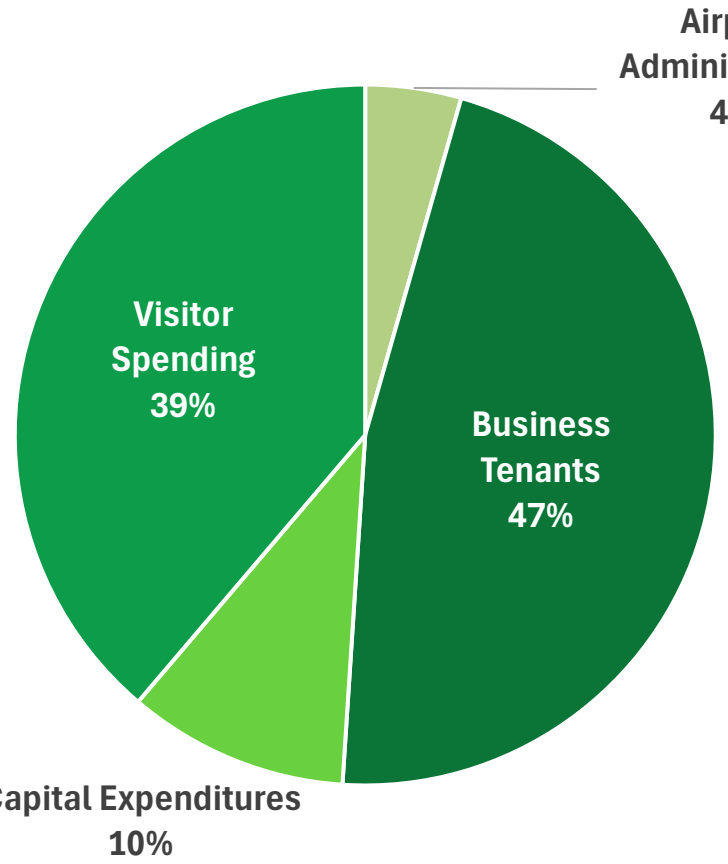
- More food options post security
- More direct flight options
- Increased staffing at airline counters
- Decreased TSA wait times

~24,000 valid survey responses!

Core Impacts – Statewide Totals

Category	Jobs	Payroll	Value Added	Output
Direct	9,831	$522,620,000	$707,611,000	$1,094,915,000
Multiplier	3,807	$228,192,000	$369,515,000	$695,970,000
Total	**13,637**	**$750,812,000**	**$1,077,126,000**	**$1,790,885,000**

Notes: Dollar values were rounded to the nearest 1,000. Totals may not sum due to rounding.



Core Impacts – Comparison

	Jobs	Payroll	Value Added	Output
2025	13,637	$750,812,000	$1,077,126,000	$1,790,885,000
2015	12,217	$505,247,509	N/A	$1,564,352,371
% Change	12%	49%		14%

Air Force Bases Impacts

Economic Impact Category	Grand Forks AFB (2023)	Minot AFB (2024)	Total
Total Jobs (direct + indirect)	2,611	8,494	11,105
Total Payroll (annual payroll + estimated annual dollar value of jobs created)	$161,689,834	$570,979,529	$732,669,363
Total Expenditures	$35,877,187	$80,629,944	$116,507,131
Total	**$197,567,021**	**$651,609,473**	**$849,176,494**

Sources: Grand Forks Air Force Base – Fiscal Year 2023 Economic Impact Statement; Minot Air Force Base, North Dakota – Economic Impact Analysis, Edition FY24, 2025.

Aircraft/Aerospace Manufacturing Impacts

	Jobs	Payroll	Value Added	Output
Direct	1,598	$145,987,000	$267,442,000	$526,009,000
Multiplier	1,025	$67,432,000	$110,087,000	$205,637,000
Total	**2,623**	**$213,419,000**	**$377,529,000**	**$731,646,000**

Notes: Dollar values were rounded to the nearest 1,000. Totals may not sum due to rounding.

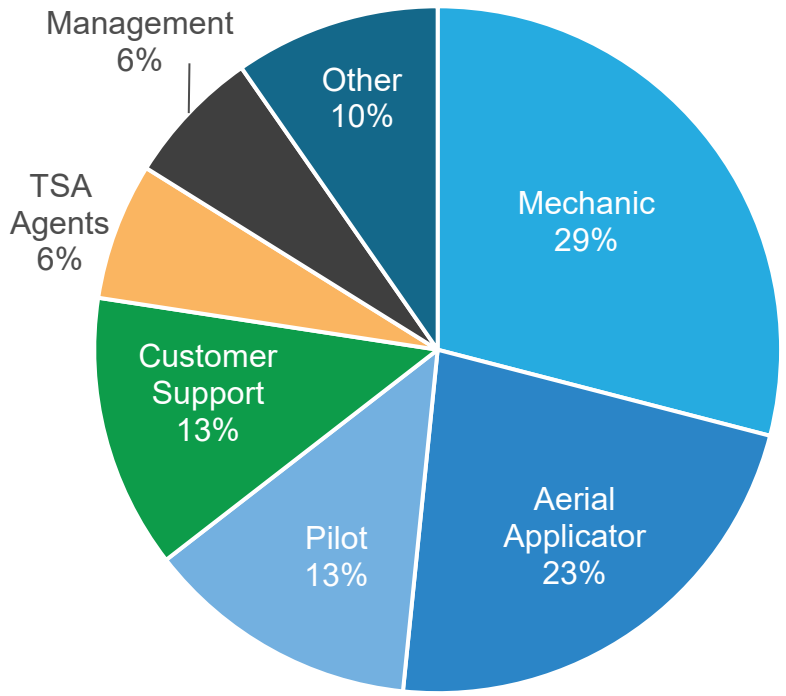
UAS Businesses Impacts

	Jobs	Payroll	Value Added	Output
Direct	380	$32,767,000	$40,403,000	$72,581,000
Multiplier	232	$14,378,000	$22,695,000	$41,722,000
Total	**612**	**$47,145,000**	**$63,097,000**	**$114,304,000**

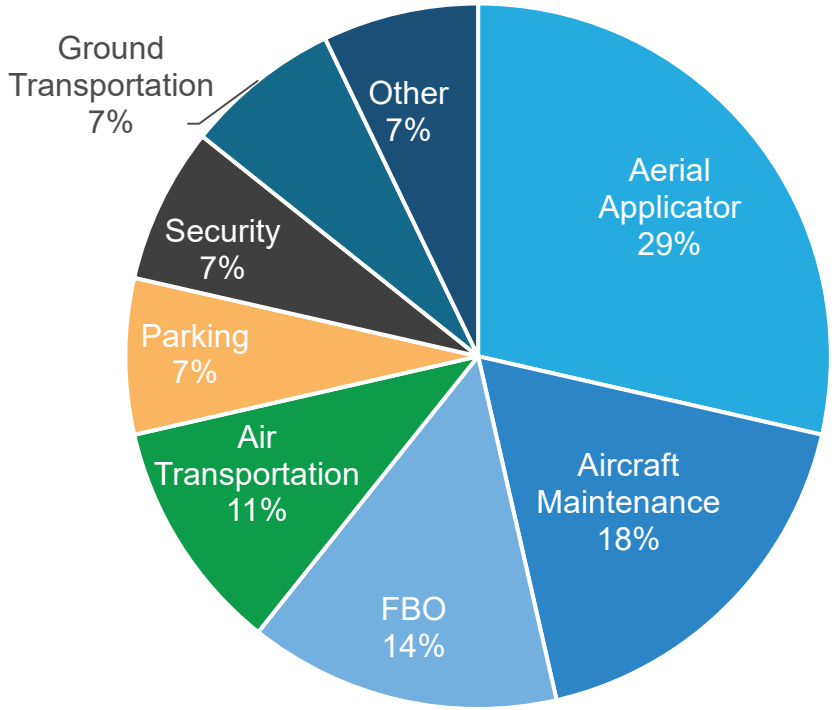
Notes: Dollar values were rounded to the nearest 1,000. Totals may not sum due to rounding.

Workforce Development Challenges

By Job Type



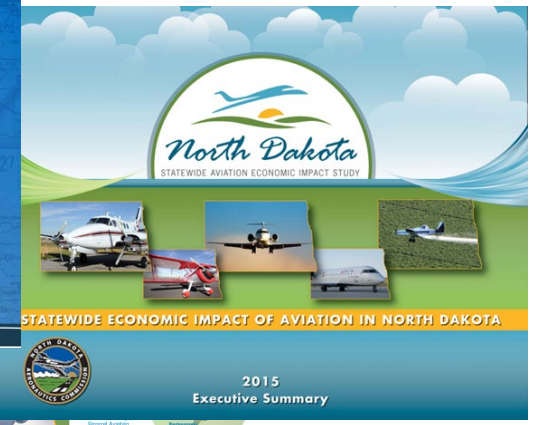
By Business Type



Deliverables and Next Steps

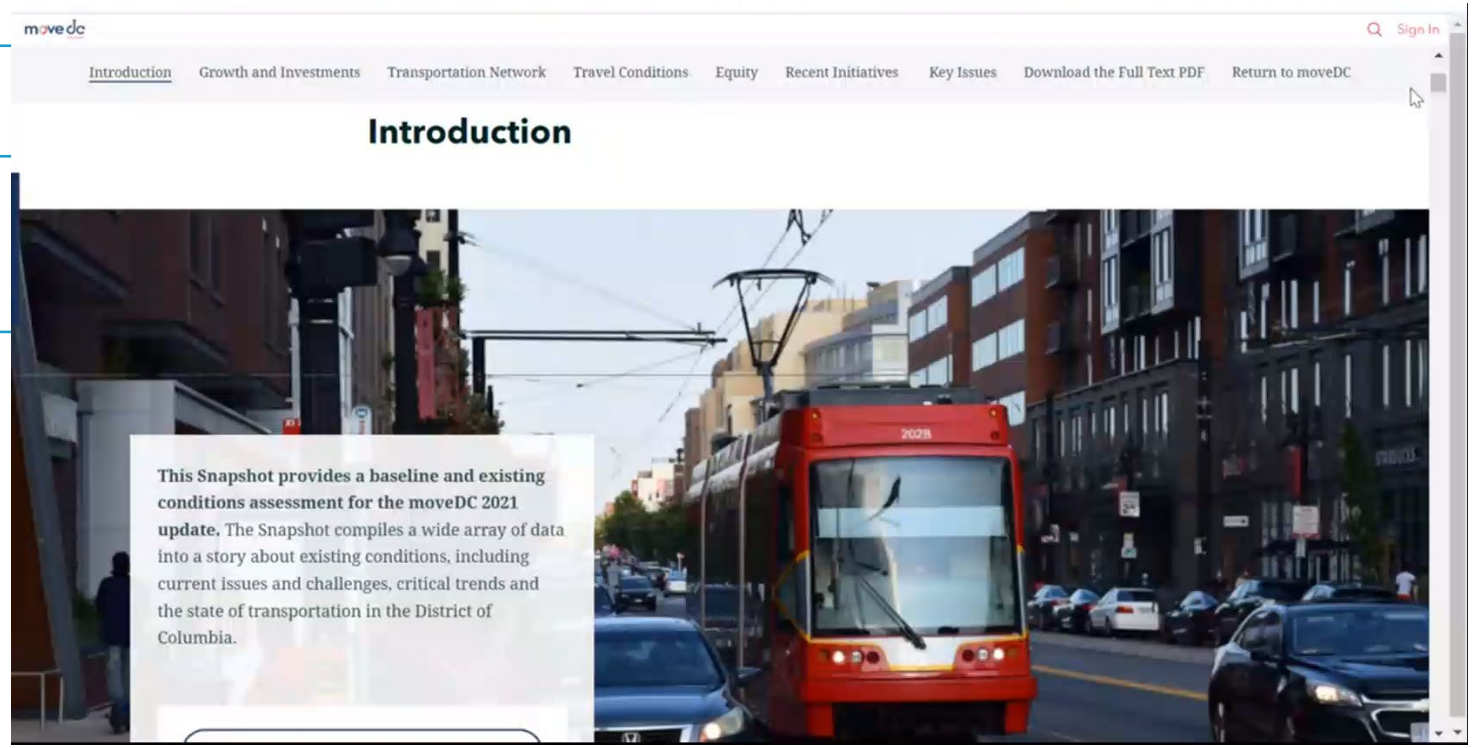
NDSASP-AEIS Deliverables

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



Story Maps

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



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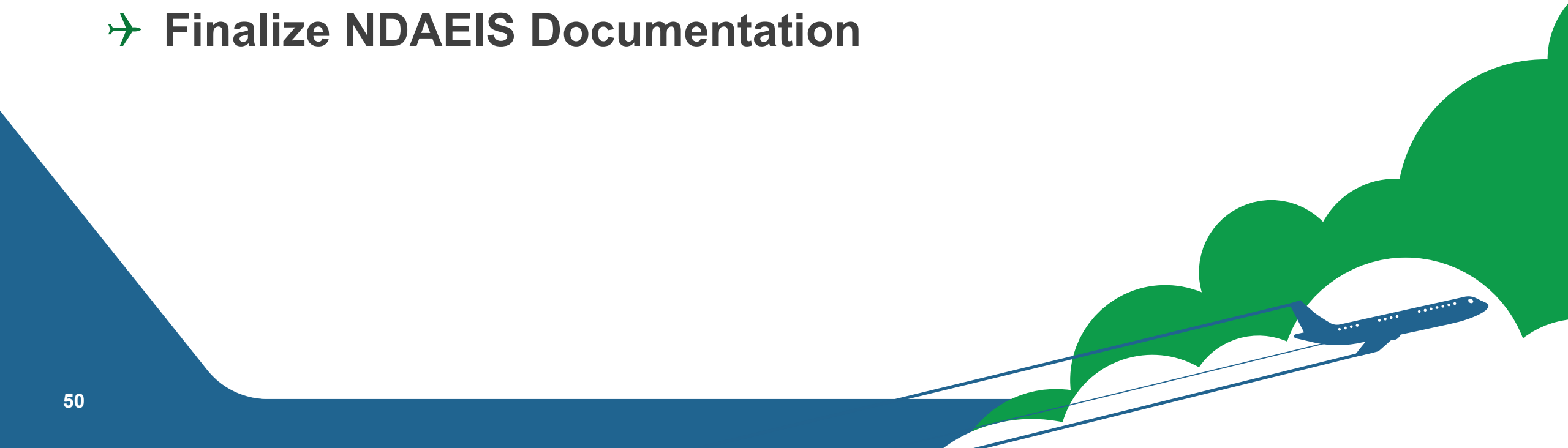
NDAEIS Next Steps

- Finalize Off-Airport UND Impacts
- Finalize Workforce Development Issue Impacts
- Compile Final NDAEIS Impacts
- Finalize NDAEIS Documentation



NDSASP Next Steps

Check the website in April for these chapters!

- Finalize Issues and Industry Advancements effort
- Finalize Recommendations and Cost Estimates effort
- Finalize NDSASP documentation
- Initiate Final Project Deliverables
- Present at Regional Presentations

Thank you! Questions?

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