



2025 North Dakota
State Aviation System Plan and
Aviation Economic Impact Study

Technical Advisory Committee (TAC)



2025 North Dakota
State Aviation System Plan and
Aviation Economic Impact Study



Project Team

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Expect More. Experience Better.



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ND Greater Chamber/Economic Development

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UND – Aircraft Mechanic

Dan Kasowski

Aerial Applicator

Matt Hovdenes



Agenda

1

Meeting Kick-off

2

2025 NDSASP Update

3

2026 NDAEIS Update

4

Project Deliverables

5

Project Wrap-up



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																								



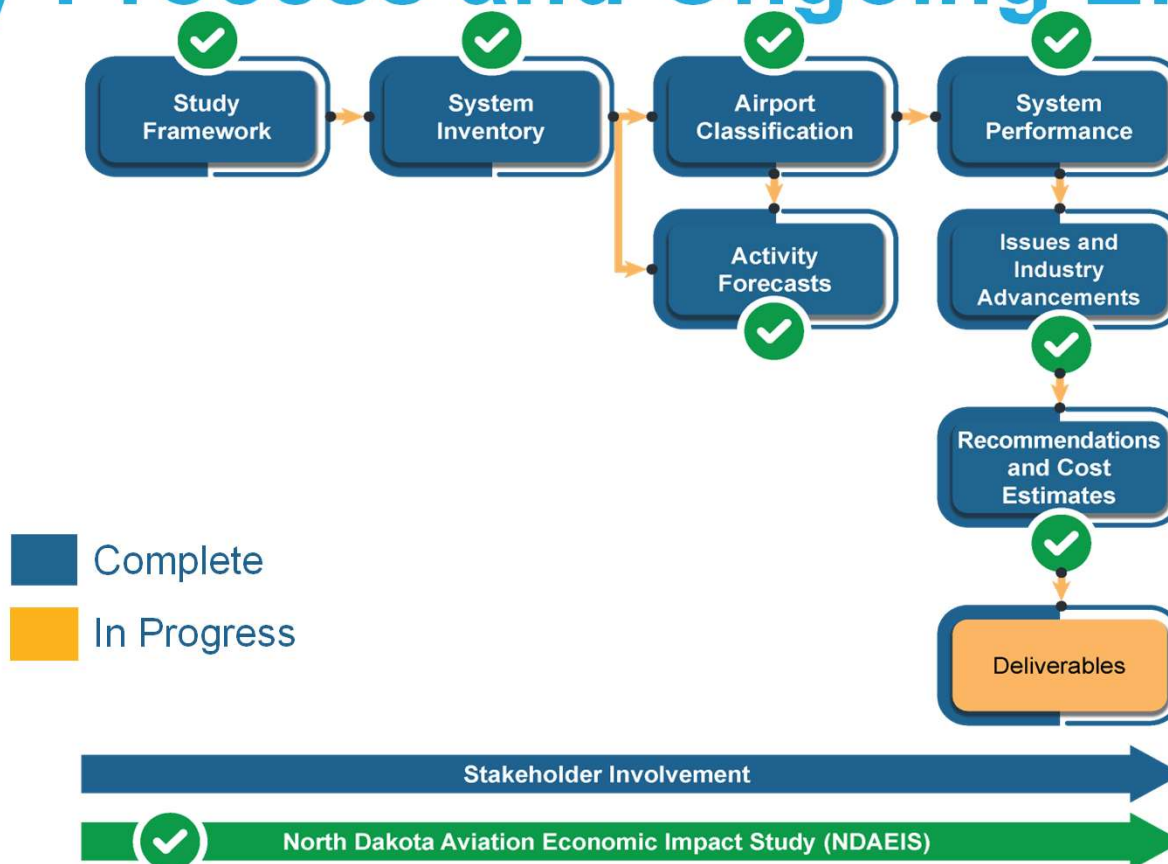
2025 North Dakota
State Aviation System Plan and
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The background of the slide is a photograph of a twin-engine propeller aircraft parked in a field of tall, golden-brown grass. The image is overlaid with a semi-transparent orange filter. In the top left corner, there is a blue-tinted inset image of a twin-engine turboprop aircraft in flight.

2025 NDSASP Update



Study Process and Ongoing Efforts





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



Total Needs Over 10 Years (2026-2035)

NDAC's 10-year CIP

\$1.126 B

+

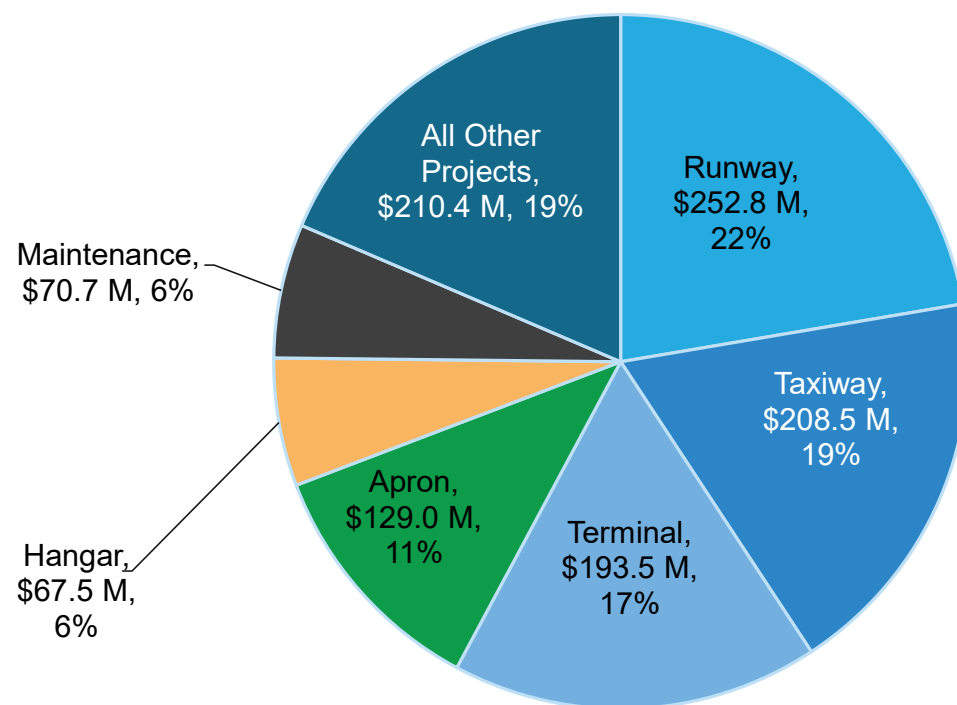
Additional NDSASP
Projects

\$5.5 M

=

Estimated 10-year
Needs

\$1.132 B

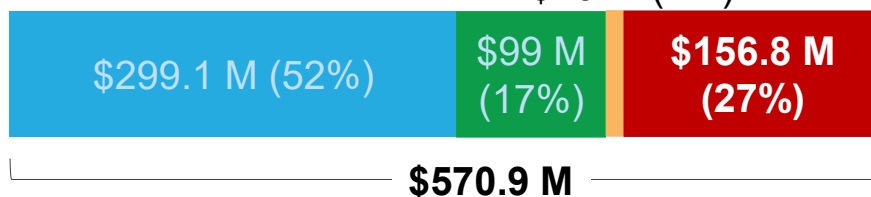




Anticipated Funding Shortfall

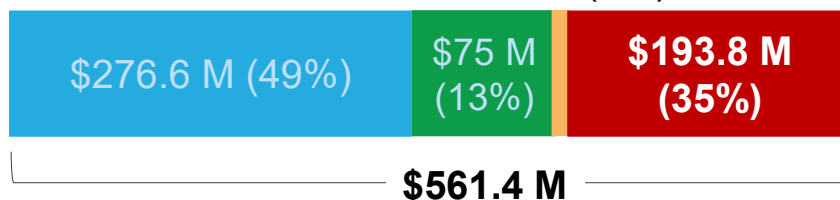
\$16 M (4%)

Years 1-5



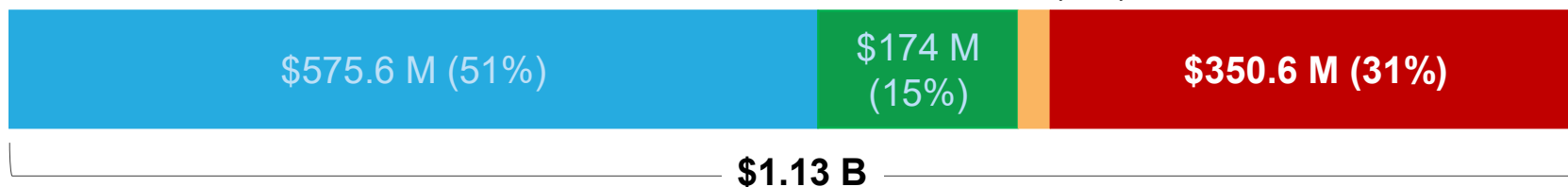
\$16 M (4%)

Years 6-10



\$32 M (4%)

Years 1-10



Federal

State

Local

Shortfall



2025 North Dakota
Aviation Economic Impact Study

2025 NDAEIS Update



Key Terminology

Measures of Economic Impact



Jobs



Payroll



Value Added



Output

Categories of Economic Impact

**Direct
Impacts**



**Multiplier
Impacts**



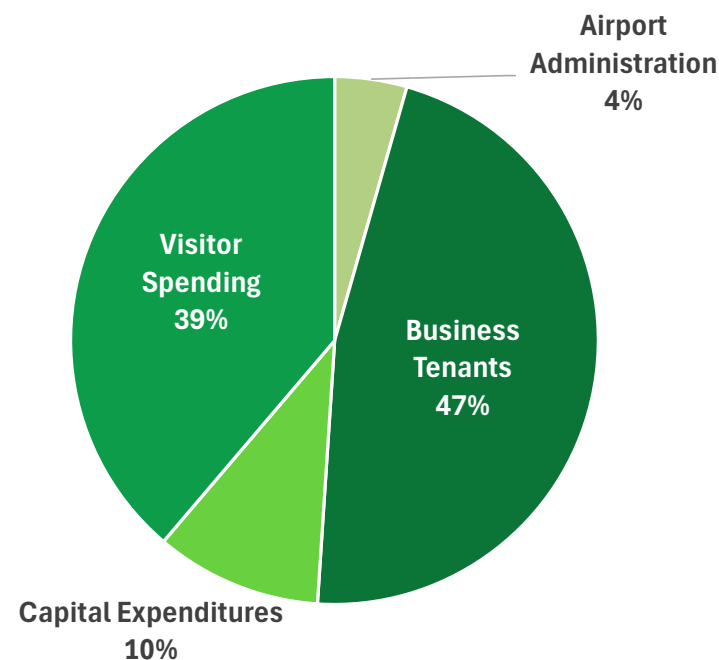
Total Impacts



Core Airport Impacts – Statewide Totals

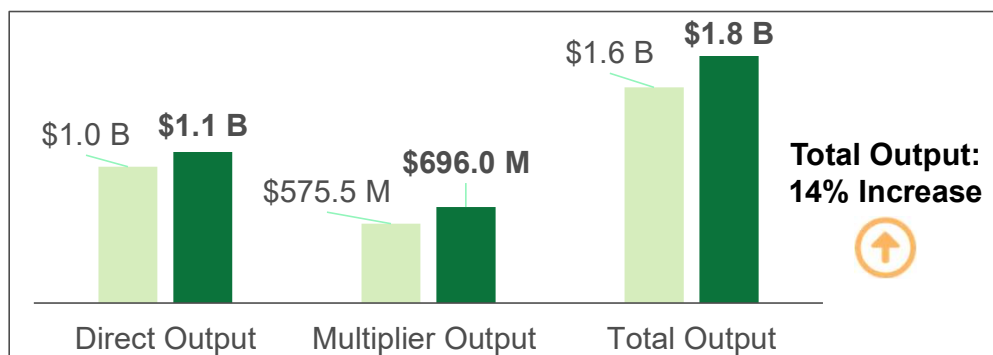
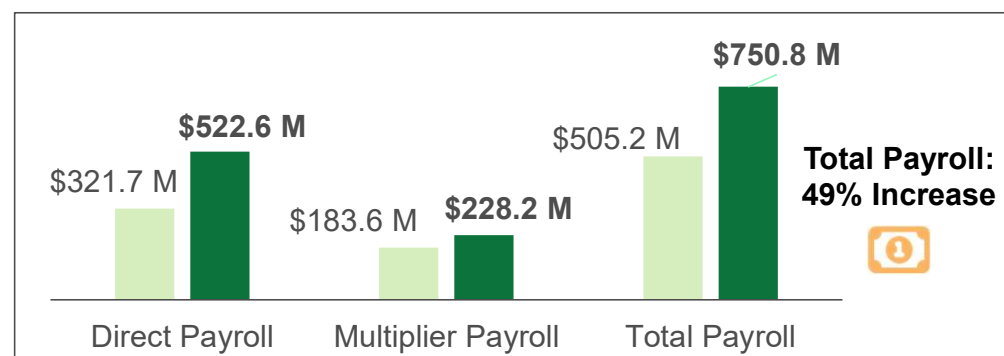
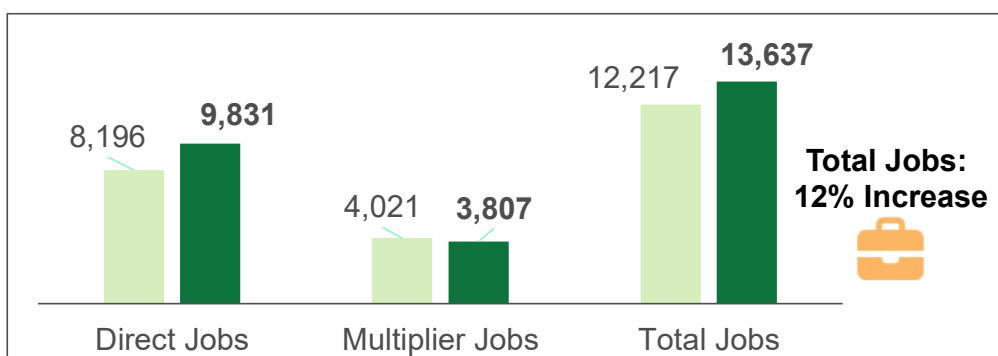
Category	Jobs	Payroll	Value Added	Output
Direct	9,831	\$522,620,000	\$707,611,000	\$1,094,915,000
Multiplier	3,807	\$228,192,000	\$369,515,000	\$695,970,000
Total	13,637	\$750,812,000	\$1,077,126,000	\$1,790,885,000

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





Comparison of Direct, Multiplier, and Total Job, Output, and Payroll Impacts for Core Airport Impacts



2015 NDAEIS
2025 NDAEIS



Off-Airport UND School of Aerospace Sciences Impacts

Source of Impact	Impact Category	Jobs	Payroll	Value Added	Output
Off-Airport	Direct	337	\$18,767,000	\$19,790,000	\$33,774,000
	Multiplier	124	\$7,427,000	\$11,855,000	\$22,679,000
	Total	461	\$26,193,000	\$31,646,000	\$56,454,000
Student Spending	Direct	N/A	N/A	N/A	N/A
	Induced Only*	295	\$16,415,000	\$27,397,000	\$46,609,000
	Total	295	\$16,415,000	\$27,397,000	\$46,609,000
All Sources Combined	Direct	337	\$18,767,000	\$19,790,000	\$33,774,000
	Multiplier	419	\$23,842,000	\$39,252,000	\$69,289,000
	Total	756	\$42,608,000	\$59,044,000	\$103,063,000



Core Airport and Supplemental Impacts

Impact Categories	Jobs	Payroll	Value Added	Output
Core Airport Impacts	13,637	\$750,812,000	\$1,077,126,000	\$1,790,885,000
<i>Off-Airport UND Aerospace</i>	756	\$42,608,000	\$59,044,000	\$103,063,000
<i>Off-Airport Statewide Aircraft/Aerospace Manufacturing</i>	2,623	\$213,419,000	\$377,529,000	\$731,646,000
<i>Off-Airport Statewide UAS Impacts</i>	612	\$47,145,000	\$63,097,000	\$114,304,000
<i>Grand Forks AFB</i>	2,611	\$161,689,834	N/A	\$197,567,021
<i>Minot AFB</i>	8,494	\$570,979,529	N/A	\$651,609,473
Total of Supplemental Impacts	15,097	\$1,035,841,000	\$499,670,000	\$1,798,189,000
Sum of All Impacts	28,734	\$1,786,653,000	\$1,576,796,000	\$3,589,074,000



Economic Loss of Workforce Development Challenges

Category	Jobs	Payroll	Value Added	Output
Direct	52	\$3,778,000	\$3,973,000	\$4,845,000
Multiplier	21	\$1,263,000	\$2,022,000	\$3,664,000
Total	73	\$5,041,000	\$5,994,000	\$8,509,000

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



2025 North Dakota
State Aviation System Plan and
Aviation Economic Impact Study

Project Deliverables



NDSASP-AEIS Deliverables



Technical Plan



Executive Summary



Fact Sheet



Individual Airport Reports (65 airports)



Story Maps (Up to 8)



2025 North Dakota
State Aviation System Plan

2025 North Dakota
Aviation Economic Impact Study



Executive Summary

July 2026

2025 NDAEIS

MOT's Airport Economic Impacts

The impacts below present the sum of direct and multiplier impacts of all activity associated with MOT. The table below offers a breakdown of the total impacts by direct, multiplier, total, and source of impact.

Jobs			Payroll			Value Added			Output		
1,788			\$66.33 M			\$98.87 M			\$170.97 M		
Source of Impact	Direct	Multiplier	Source of Impact	Direct	Multiplier	Source of Impact	Direct	Multiplier	Source of Impact	Direct	Multiplier
Airport Management	27	43	70	Airport Management	\$2.01 M	\$2.58 M	\$4.59 M	Airport Management	\$2.01 M	\$2.58 M	\$4.59 M
Airport Terminals	225	181	406	Airport Terminals	\$2.56 M	\$2.29 M	\$4.85 M	Airport Terminals	\$2.56 M	\$2.29 M	\$4.85 M
Capital Expenditures	23	10	33	Capital Expenditures	\$1.34 M	\$899,000	\$2.24 M	Capital Expenditures	\$1.34 M	\$899,000	\$2.24 M
GA Visitor Spending	454	43	497	GA Visitor Spending	\$4.01 M	\$2.47 M	\$6.48 M	GA Visitor Spending	\$4.01 M	\$2.47 M	\$6.48 M
CS Visitor Spending	434	133	567	CS Visitor Spending	\$12.64 M	\$7.55 M	\$20.19 M	CS Visitor Spending	\$12.64 M	\$7.55 M	\$20.19 M
Total Jobs Impacts	969	379	1,348	Total Payroll Impacts	\$45.19 M	\$22.96 M	\$68.15 M	Total Output Impacts	\$45.19 M	\$22.96 M	\$68.15 M

Source: 2025 NDAEIS Airport Manager Survey, BPSA, 2025, Motley-Horn, 2025. Notes: Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding.

2025 NDAEIS

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The 2025 NDAEIS estimates the economic impact of North Dakota's aviation industry by evaluating core airport-related impacts from both on and off airport activities, along with broader off airport industry effects identified as supplemental impacts.

Core Impacts

Supplemental Impacts

On Airport Impacts

Off Airport Impacts

Report Administration

Business Terminals

Capital Expenditures

Commercial Service Visitor Spending

General Aviation Visitor Spending

Grand Forks and Minot Air Force Bases

Aircraft/Aerospace Manufacturing

UAS Businesses

OR Airport/UND School of Aerospace Sciences

Economic Impact Loss of Workforce Development Challenges

Measures and categories of economic impact describe how impacts are defined and interpreted. Measures identify the type of impact and include jobs, payroll, value added, and output. Jobs and payroll are similar terms to many, with value added equal to contributions to gross domestic product (GDP), and output meaning the total expenditures incurred and can be referred to as "economic impact."

Categories of impact refer to where in the economic cycle the impact is occurring. Direct impacts represent the initial effects of a specific activity, whereas the multiplier effects represent the "spillover" effects from household spending and supplier sales. The total impacts are considered the sum of these two activities.

See the NDAEIS Technical Report (included as Chapter 9 of the NDSASP Technical Report) for more details on these terms and the study's methodology.

Statewide Results

The following presents the total economic impacts of the core and supplemental impacts of the 2025 NDAEIS. These results are presented in 2025 dollars and based on data collected from calendar year 2024. For more detailed breakdowns of the direct and multiplier effects associated with these total impacts, please refer to the NDAEIS Technical Report (included as Chapter 9 of the NDSASP Technical Report) or the Statewide Fact Sheet.

Impact Source	Jobs	Payroll	Value Added	Output
Airport Administration	443	\$25,495,000	\$25,275,500	\$79,294,000
Business Terminals	8,268	\$438,497,000	\$445,905,000	\$854,747,000
Capital Expenditures	4,901	\$63,556,000	\$66,517,000	\$162,444,000
Commercial Service Visitor Spending	4,570	\$179,598,000	\$388,181,000	\$632,087,000
General Aviation Visitor Spending	1,402	\$53,775,000	\$87,100,000	\$162,901,000
Sub-Total of Core Impacts of All Public-Use Airports	19,684	\$746,912,000	\$818,979,000	\$1,799,435,000
Grand Forks and Minot Air Force Bases	1,109	\$7,489,500	\$7,489,500	\$994,144,000
Aircraft/Aerospace Manufacturing	2,620	\$173,419,000	\$377,529,000	\$719,646,000
UAS Businesses	10	\$47,436,000	\$62,000,000	\$114,500,000
OR Airport/UND School of Aerospace Sciences	769	\$45,000,000	\$45,000,000	\$114,500,000
Sub-Total of Supplemental Aerospace Industry Impacts	15,907	\$1,025,844,000	\$1,487,539,000	\$1,798,395,000
Total Impacts of Aerospace Industry in North Dakota	35,591	\$1,772,756,000	\$1,576,708,000	\$3,597,830,000

Notes: Jobs rounded to the nearest whole number. Dollar values are rounded to the nearest thousand, including the dollar values associated with the Grand Forks and Minot Air Force Bases as these values were adopted directly from an independent study. Totals may not sum due to rounding.

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**2025 North Dakota
State Aviation System Plan and
Aviation Economic Impact Study**

Executive Summary





2025 North Dakota State Aviation System Plan and Aviation Economic Impact Study

NDSASP-AEIS Fact Sheet

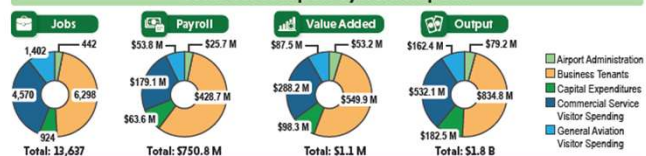
2025 North Dakota Aviation Economic Impact Study

North Dakota's 89 public-use airports, including eight commercial service and 81 general aviation airports, are vital to the state's transportation network and economy. The 2025 North Dakota Aviation Economic Impact Study (NDAEIS) quantified the jobs, payroll, value added, and economic output generated by airport operations, aviation businesses, capital expenditures, and visitor spending, as well as off-airport aerospace activities. See the NDAEIS Technical Report (Chapter 9 of the NDSASP Technical Report) for detailed documentation on terminology, methodology, and results.

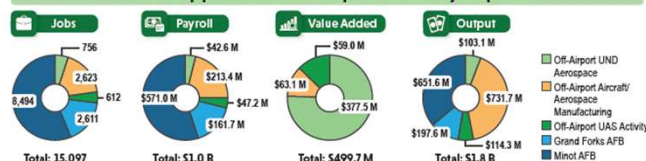
Core Airport Impacts		Supplemental Aerospace Industry Impacts
On-Airport Impacts	Airport Administration	Grand Forks and Minot Air Force Bases (AFBs)
	Business Tenants	Off-Airport Aircraft/Aerospace Manufacturing
	Capital Expenditures	Off-Airport Uncrewed Aerial System (UAS) Activity
Off-Airport Impacts	Commercial Service Visitor Spending	Off-Airport University of North Dakota School of Aerospace Sciences (UND Aerospace)
	General Aviation Visitor Spending	Economic Impact Loss of Workforce Development Challenges*

*The economic impacts associated with workforce development challenges were not deducted from the results presented in this fact sheet.

Total Core Airport System Impacts



Total Supplemental Aerospace Industry Impacts



Notes: The AFB Economic Impact Statements did not calculate value added impacts and these impacts are not reflected in the Value Added pie chart above.

Total Impacts of the Aerospace Industry in North Dakota



Estimated Tax Revenues Generated from Aviation Activity

Aviation activity across North Dakota generates millions of dollars in federal, state, and local tax revenues each year. These tax contributions support public services, infrastructure, education, and community programs, while reflecting the important role airports play in sustaining the state's economy.

	Federal	State	Local	Total
	\$228.1 M	\$41.2 M	\$6.9 M	\$276.2 M

Sources: IMPLAN, 2025; Minot Air Force Base, North Dakota - Economic Impact Analysis: Edition FY23, 2025; Grand Forks Air Force Base - Fiscal Year 2023 Economic Impact Statement, 2023, 2013 NDAEIS; Kinley-Horn, 2020.

2025 North Dakota State Aviation System Plan

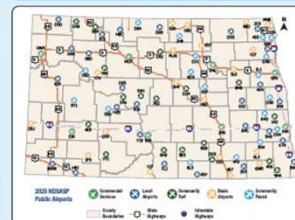
North Dakota's 89 public-use airports all serve distinct and vital roles based on the type of operations they support and the facilities and services they offer. These roles are referred to as Airport Classifications and include Commercial Service, Local, Basic, Community Paved, and Community Turf airports. Together, these airports provide connectivity and support a wide range of activities, including passenger travel, business aviation, agricultural operations, emergency response, medical transport, flight training, and tourism. To ensure this statewide network continues to meet evolving needs, the North Dakota Aeronautics Commission (NDAC) develops the North Dakota State Aviation System Plan (NDSASP). The NDSASP provides a long-range vision for the aviation system by setting goals, identifying Performance Measures (PMs) and Performance Indicators (PIs) that evaluate system performance, and uses the results of those analyses to identify opportunities for improvements and enhancements. By helping guide investment and policy decisions, the NDSASP supports a safe, connected, and resilient aviation network that strengthens North Dakota's economy and quality of life. Refer to the NDSASP Technical Report for a complete list of airport names, PMs, PIs, and documentation of all system plan analyses.

NDSASP Goals

The NDSASP goals represent the key priorities of North Dakota's aviation system and provide the framework for evaluating current performance, identifying future needs, and guiding long-term investment decisions throughout the study.

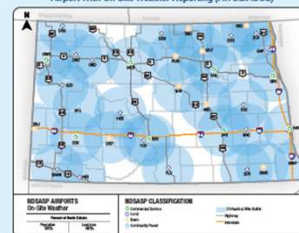
- Maintain a Safe Aviation System
- Enhance Quality of Life
- Promote Aviation System Coverage
- Preserve Airport Infrastructure
- Provide Air Access to Airports
- Support Aviation Education and Industry Advancement

Airport Classifications

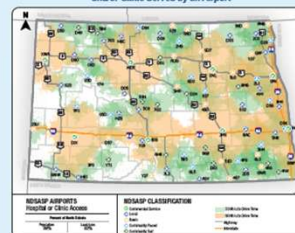


PM and PI Examples

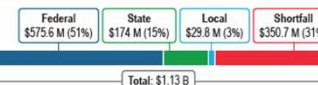
PM: Percent of Area and Population Within 30 Nautical Miles of an Airport With On-Site Weather Reporting (AWOS/ASOS)



PI: Percent of Airports and Population with a Hospital and/or Clinic Served by an Airport



Analyses completed as part of the NDSASP identified approximately \$1.13 billion in airport infrastructure maintenance, and system improvement needs across North Dakota's public-use airports over the next 10 years. Based on anticipated federal, state, and local funding levels, a funding gap of approximately \$350.7 million is projected through 2035.





2025 North Dakota State Aviation System Plan and Aviation Economic Impact Study

Airport Brochures





GIS Story Map



Home

Airport Inventory

Airport Infrastructure

General Aviation

Commercial Service Activity Levels

Air Cargo

Economic Impact



2025 NORTH DAKOTA Aviation Economic Impact Study

Measuring the economic value of North Dakota's
aviation system through data-driven analysis.

EXPLORE THE STUDY →

VIEW STATEWIDE MAP ↗



Airport Inventory

Explore the airports that make
up North Dakota's aviation
system.



Airport Infrastructure

Review runway, taxiway, and
facility information across the
state.



General Aviation

Understand the role of
general aviation in connecting
people, businesses, and
communities.



Commercial Service

See how commercial air
service connects North Dakota
to the nation and the world.



Air Cargo

Explore air cargo activity and



Economic Impact

Discover the economic



Aviation Education

Learn about aviation



UAS Infrastructure and Investment

Review unmanned aircraft



2025 North Dakota
State Aviation System Plan and
Aviation Economic Impact Study

Project Wrap-Up



Additional Deliverables & Next Steps

- **GIS Map Interface**
- **UND Fact Sheet**
- **NDSASP/NDAEIS Technical Report**
- **Regional Presentations and Webinar**



Stay Involved

- **Review and Share Final Deliverables with Your Networks**
- **Stay up to Date with the Project Website**
- **Join an Upcoming Regional Presentation**
 - Tuesday, August 25 | 9-11am | BIS ARFF Building | 2301 University Drive Bldg. 14, Bismarck, ND 58504
 - Tuesday, August 25 | 3-5pm | Minot Council Chambers | 10 3rd Ave SW, Minot, ND
 - Wednesday, August 26 | 1-3pm | The Hive | 375 2nd Ave N, Grand Forks, ND
 - Thursday, August 27 | 9-11am | Fargo Air Museum | 1609 19th Avenue North, Fargo, ND
- **Statewide Webinar**



Questions?

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