



Chapter 9. North Dakota Aviation Economic Impact Study

9.1. Introduction

Aviation plays an essential role in supporting North Dakota's economy by enhancing connectivity for businesses, residents, and visitors through a range of activities, including facilitating agricultural activity and energy development, supporting emergency medical and public safety services, and connecting communities to regional, national, and global markets. Airports across the state serve a diverse range of users, including general aviation (GA) pilots, commercial air service passengers, military operations, uncrewed aircraft systems (UAS), and aviation education and training programs. The state's airport system also hosts businesses and activities that generate economic activity through employing residents and spending.

The 2025 North Dakota Aviation Economic Impact Study (2025 NDAEIS) evaluates and quantifies the economic contributions generated by this activity throughout the state, offering clear and data-driven insights into how the state's airports stimulate economic activity. The findings of this study are intended to communicate the economic importance of aviation to federal, state, and local decision-makers, airport sponsors, and the general public.

The 2025 NDAEIS is a companion study to the 2025 North Dakota State Aviation System Plan (2025 NDSASP). While the 2025 NDSASP focuses on evaluating system performance, facility needs, and future investment priorities, the 2025 NDAEIS identifies and quantifies the economic role aviation plays in supporting North Dakota's statewide economy. Together, these studies provide a comprehensive foundation for informed planning and investment decisions by the North Dakota Aeronautics Commission (NDAC) and its partners.

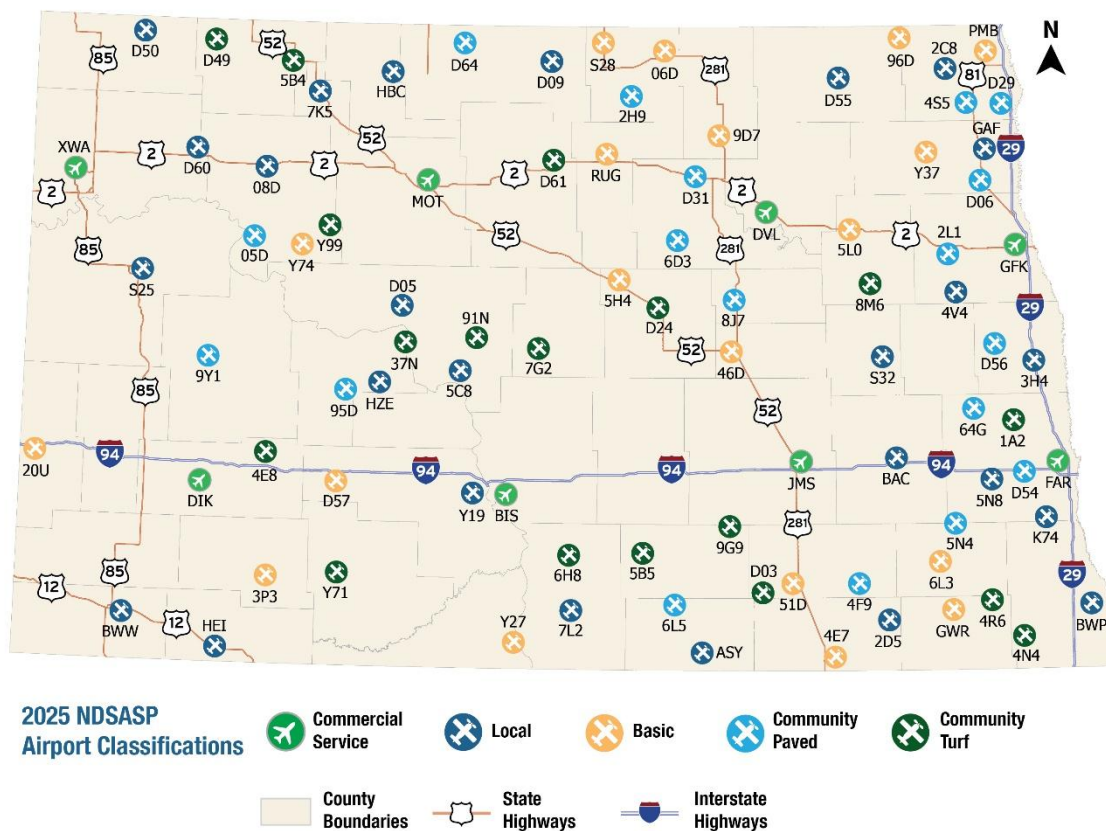
9.1.1. Prior Aviation Economic Impact Analyses

NDAC has conducted several analyses of the state's aviation economic impact over the years, with the most recent study completed in 2015. There were also earlier iterations, including one in 2010. Each of these studies builds on prior analyses, with the emphasis on the changes that have occurred in the national, state, regional, and local economies that impact economic activity resulting from aviation in North Dakota. The methodologies are generally consistent between studies, with small modifications depending on data available at the time of the analysis. As appropriate and relevant, comparisons to the 2015 NDAEIS results are presented. Notable differences in methodology are identified for reference in the relevant sections.

9.1.2. Study Airports

North Dakota's airport network includes a mix of public-use and private-use facilities, with the Federal Aviation Administration (FAA) reporting approximately 309 aviation-related facilities statewide. As shown in **Figure 9-1**, this analysis focuses on the state's 89 public-use airports, including eight commercial service airports and 81 GA airports. These 89 public-use airports serve a variety of functions within the statewide aviation system and support a diverse range of users and activities.

Figure 9-1. NDSASP Airports



Source: Kimley-Horn, 2026.

9.2. Economic Impact Methodology

The economic impacts presented in this chapter were estimated using an industry-standard input-output modeling approach consistent with best practices for statewide aviation economic impact studies (AEISs). This methodology is designed to measure and quantify the contribution of aviation activity to the North Dakota economy and capture a range of economic activity supported by the state's public-use airport system. As is typical for statewide aviation economic



impact studies, data is gathered to represent 12 months, which in the case of the 2025 NDAEIS is calendar year (CY) 2024.

The terminology, impact measures, and general methodology used in the 2025 NDAEIS are consistent with those applied in the 2015 NDAEIS, allowing for high-level comparison between studies. The economic impact terms, measures, categories, and modeling process utilized for the 2025 study are detailed in the following sections.

9.2.1. Economic Impact Terms

Three economic impact terms are used in this study to classify impacts at individual airports and the statewide level: direct, multiplier, and total impacts. Direct impacts refer to the impacts generated directly by airport operations and visitors arriving by air and are estimated based on survey results and other primary data sources. Indirect and induced impacts, referred to as “multiplier impacts,” arise through supplier purchases and income re-spending.¹ The multiplier impacts are quantified through IMPLAN during the economic modeling process, based on the direct data inputs. Together, these categories capture a range of economic activity generated by the aviation industry in North Dakota. The definitions of each impact category and their relationship to the economic impact measures reported in this study are summarized in Error! Reference source not found..

Table 9-1. Economic Impact Term Definitions

Term	Definition
Direct Impacts	Economic activity that occurs as an immediate result of aviation-related operations, including expenditures by airport operators, on-airport businesses, construction spending, and visitors.
Indirect Impacts	Economic activity generated when aviation-related businesses purchase goods and services from other businesses (supplier purchases) within the region, supporting additional production and employment among suppliers.
Induced Impacts	Economic activity resulting from employees spending their earnings on goods and services (income re-spending) further supporting jobs and business activity.
Total Impacts	The sum of direct and multiplier (indirect and induced) impacts.

Source: Kimley-Horn, 2026.

¹The 2015 NDAEIS reported a single indirect impact category that combined both indirect and induced effects; these impacts are reported separately in the 2025 NDAEIS.



9.2.2. Economic Impact Measures

The economic terms are measured by way of jobs, payroll, value added, and output. These measures are generally consistent with the 2015 NDAEIS, with the new measure of “value added” being introduced to the 2025 NDAEIS. Each impact measure is defined in **Table 9-2**.

Table 9-2. Economic Impact Measure Definitions

Measure	Definition
Jobs	The total number of individuals employed as a result of airport or aviation-related activity, including both full-time and part-time positions.
Payroll	The total compensation earned by employees, including salaries, wages, and employer-provided benefits, as well as associated taxes paid on behalf of employees.
Value Added	The contribution of aviation activity to the overall economy, measured as the value of goods and services produced minus the cost of inputs required to produce them (such as fuel, materials, and services). This measure is comparable to gross domestic product (GDP).
Output	The total value of economic activity generated by aviation, including the initial spending and the additional business transactions it supports. This measure reflects both production and the flow of spending across industries.

Source: Kimley-Horn, 2026.

9.2.3. Economic Impact Categories

Economic impact categories group impacts based on their source. For this study, five impact categories are organized into two primary groups: on-airport and off-airport. Each category is defined and described within these groupings in the sections that follow.

9.2.3.1. On-Airport

On-airport impacts refer to the impacts that originate from on-airport activity. This includes employment of airport administrative staff, on-airport business tenants, and expenses related to capital improvement projects.

Airport Administration encompasses all personnel responsible for managing daily airport operations. Typical roles include airport managers, maintenance and grounds staff, finance administrators, and local government employees who oversee the airport.

On-Airport Business Tenants refer to businesses located on airport property that operate under a lease, rental agreement, or other formal arrangement with the airport sponsor and have paid employees. These businesses may occupy private facilities or public-facing spaces, such as terminal buildings, and include both aeronautical and non-aeronautical activities. Examples of on-airport business tenants include fixed-base operators (FBOs), flight schools, maintenance providers, and rental car agencies.



Businesses that lease hangar space but are based off-site and do not have employees working on airport property are not considered on-airport business tenants for this analysis. The primary criterion for inclusion is the presence of employee activity on airport property.

Capital Improvements refer to development and construction efforts occurring on airport property. The analysis incorporates project spending reported by airport sponsors and on-airport business tenants and reflects the full cost of each project, regardless of whether funding was provided privately or at the local, state, or federal level.

Information on construction expenditures was collected for the period from 2021 through 2024 from both airport managers and on-airport businesses. Because capital spending can fluctuate from year to year, these expenditures were averaged over the four-year period to provide a more stable representation of overall investment levels and the resulting economic impact.

9.2.3.2. Off-Airport

Off-airport impacts represent the economic activity generated outside airport property by visitors who travel to North Dakota using the state's airports. This includes spending by both commercial service and GA visitors across local industries such as lodging, food service, transportation, retail, and entertainment.

This analysis is designed to capture new economic activity entering the state, rather than existing spending that is recirculated within the state and local economies. As a result, only expenditures made by out-of-state visitors traveling to North Dakota were included in the analysis.

Commercial Service Visitor Spending represents the economic activity generated by out-of-state travelers arriving in North Dakota via scheduled commercial air service at one of the eight commercial airports in the state. This analysis focused on visitors whose final destination is North Dakota.

General Aviation Visitor Spending includes the economic activity generated by out-of-state visitors traveling to North Dakota via private or non-commercial aircraft. This category encompasses spending by pilots and passengers who arrive via GA aircraft and spend money off airport property. Money spent on fuel for the aircraft or in a terminal, such as concessions, is not included since it is reflected in the on-airport business activity reported. GA visitor spending was included at all 89 airports across the state.

9.3. Approach to Data Collection

A series of targeted surveys, distributed in coordination with airport site visits, were used to gather detailed information on aviation-related activities generating direct economic impacts both on- and off- airport property. These efforts focused on capturing employment levels,



payroll, operating expenses, capital investment, and visitor spending associated with aviation activity across the state.

This section outlines the data collection efforts supporting the economic impact analysis, including survey administration, airport site visits, and the data validation process. The objective of this effort was to obtain reliable and readily available direct data, which serves as the foundation for estimating multiplier effects.

9.3.1. Surveys and Data Collection Methods

Three surveys were developed and distributed to collect primary data on aviation activity occurring both on- and off-airport. These surveys included the Airport Manager Survey (AMS), Business Tenant Survey, and Commercial Service Passenger Survey. In addition to the Commercial Service Passenger Survey, other secondary data collection methods were deployed to estimate the number of out-of-state (true visitors) for both commercial service and GA visitors, as well as estimate spending by GA visitors as no GA passenger survey was deployed. Additional details on each survey and other data collection methods are provided in the sections that follow.

9.3.1.1. Airport Manager Survey

The economic impact data collection effort was incorporated into the broader AMS developed for the 2025 NDSASP. The economic impact elements of the survey were designed to collect direct, on-airport data from airport administrative staff, including information on airport employment, GA activity, and on-airport business tenants.

The economic impact aspects of the survey were organized into five primary data categories: aviation activity, airport employment, airport expenditures, on-airport business tenant identification, and airport narrative for inclusion in individual airport profiles.

The AMS was distributed as a fillable PDF via email to the managers or equivalent representatives of all 89 public-use airports. Information related to on-airport business tenant identification was requested separately through a Microsoft Excel spreadsheet, which was included in the same email distribution as the AMS PDF.² A summary of the specific data collected through the AMS is provided in **Table 9-3**.

² Commercial service airports were provided the option of filling out the business tenant Excel spreadsheet attached to the AMS or providing the airport security badge list.



Table 9-3. Airport Manager Survey Data Categories

Survey Category	Data Collected
Aviation Activity	Total annual GA operations, percentage of out-of-state operations, and average number of passengers per GA aircraft
Airport Employment	Full- and part-time airport sponsor employment
	Occupational breakdown of airport employment (i.e., managerial/supervisory, clerical/administrative, maintenance and skilled trades, security, food service, retail, other)
Airport Expenditures	Airport sponsor payroll
	Contracted services, including service type, number of employees, 2024 contract cost, and service location (on- or off-airport)
	Capital improvement expenditures over the four-year period 2021–2024
	Annual operating expenses (2024)
	Private investment projects by non-tenant entities and associated costs (2021–2024)
On-Airport Business Tenant Identification	Business name, primary contact, and email address
	Estimated on-airport employment by tenant
	Security badge lists (commercial service airports only)
Airport Narrative	Qualitative information describing the airport's broader economic role and community contributions

Source: Kimley-Horn, 2026.

9.3.1.2. Business Tenant Survey

The business tenant survey was developed to collect business-specific information from all on-airport tenants identified through the AMS. The survey gathered data across four primary categories: business tenant profile, tenant employment, capital improvement expenditures, and workforce shortages. In cases where employment information reported by tenants differed from that provided by airport managers, tenant responses were used as the primary data source.

The survey was distributed via email to all on-airport businesses that had an identified point of contact on the AMS. Respondents were given the option to complete the survey using either a fillable PDF or an online questionnaire accessed through a link or QR code. Phone calls were made to tenants without email addresses provided and the survey was completed over the phone, if needed. A summary of the specific data requested through the business tenant survey is provided in **Table 9-4**.



Table 9-4. Business Tenant Survey Data Categories

Survey Category	Data Collected
Business Tenant Profile	Business name, primary contact, phone number, email address, and airport of operation
	Classification of business activity (e.g., air transportation, FBO, wholesale distribution, car rental, flight training, construction, grounds maintenance, concessions, aerial application)
Tenant Employment	Full- and part-time on-airport employment (2024)
Capital Improvement Expenditures	Capital investment expenditures made by the business tenant at the airport over the four-year period 2021–2024
Workforce Shortages	Number of unfilled positions (2024) and associated job roles
	Anticipated employee departures, including role, reason, and expected timing
	Projected hiring needs and anticipated hiring timelines

Source: Kimley-Horn, 2026.

9.3.1.3. Commercial Service Visitor Data Collection

Estimating impacts associated with visitor spending requires two key inputs: the number of total visitors and the amount of money those visitors spent while in North Dakota.

Estimating the number of true visitors at the eight commercial service airports was based on data from Airline Data, Inc., ND Airline Boarding Reports, and close coordination with NDAC. While the base year for the 2025 NDAEIS is CY 2024 for most analyses, 2025 passenger spending was collected through real-time surveys. To better align with this timeframe, passenger data from ND's Airline Boarding Reports for fiscal year (FY) 2025 was used. The Boarding Reports provide total passenger counts but do not distinguish between residents and visitors. To estimate the share of out-of-state travelers, the percentage of residents versus visitors was derived from Airline Data, Inc. reports. Applying the visitor percentage to total passengers yielded an estimate of annual true visitors for each commercial service airport.

Estimating the spending by these true visitors was based on responses from the Commercial Service Passenger Survey, which was deployed at all eight commercial service airports and collected airport-specific visitor spending and passenger experience data. The survey was administered electronically using QR codes displayed on posters throughout commercial service airport terminal facilities. Passengers accessed the survey by scanning the QR code with a mobile device, allowing for convenient, self-guided participation during their time at the airport. The survey was deployed from November 2025 through August 2026.

Of the eight commercial service airports surveyed, five achieved statistically valid sample sizes: Bismarck Municipal Airport (BIS), Hector International Airport (FAR), Grand Forks



International Airport (GFK), Minot International Airport (MOT), and Williston Basin International Airport (XWA). Three airports, Devils Lake Regional Airport (DVL), Dickinson – Theodore Roosevelt Regional Airport (DIK), and Jamestown Regional Airport (JMS), did not reach the minimum threshold required for a valid sample size. For these airports, a regionality factor analysis was conducted to adjust direct visitor spending estimates based on the average statewide commercial service spending per visitor value determined from all valid survey responses. This analysis examined the relationship between visitor-spending industries, including retail, lodging, food and beverage, entertainment, and local transportation, and regional payroll per employee metrics. The adjustment methodology accounts for regional economic differences by comparing industry-specific payroll per employee across regions against the statewide average. Regions with higher payroll costs relative to the state average received proportional adjustments to visitor spending estimates, while regions below the statewide average were adjusted accordingly.

As shown in **Figure 9-2**, a total of 39,545 survey responses were received across all airports. Of these, 23,751 responses (60 percent) were considered valid for the quantitative and qualitative components of the survey. The threshold for inclusion in the quantitative visitor spending was more stringent. To be considered a valid true visitor survey, a respondent needed to mark out of state and provide valid responses to all required questions. A total of 6,754 valid true visitor surveys were received. **Figure 9-2** also presents a summary of the qualitative data gathered from both in-state- and out-of-state passengers.



Figure 9-2. North Dakota Commercial Service Visitor Feedback Overview

North Dakota Commercial Airports - Overview of Visitor Feedback

Collected via Survey Monkey from November 2024 - August 2025

Number of Responses: 39,545		Number of Valid Responses: 23,751	
Reason for Travel			
Leisure	42 %	Over 300 individuals reported traveling for the purpose of touring or visiting a North Dakota College or University!	
Business	47 %		
Other	11 %		
Rating of Overall Experience at the Airport			
Excellent	52%	90% of survey responses indicate a positive experience travelling through North Dakota's Commercial Service Airports!	
Good	38%		
Neutral	9%		
Poor	1%		
Awful	0%		
Positive Feedback Received			
BIS: We LOVE the Bismarck airport. The size is perfect, no lines, TSA crew is friendly, and the shop has a good selection.			
XWA: Williston Airport is my favorite airport in America, and SO clean!			
MOT: I am in Minot once a month and it is one of my favorite airports.			
GFK: Everything in the GFK is perfect! Very nice people and nice facility!			
JMS: This airport is great! Very convenient and clean!			
DVL: WE love flying out of Devils Lake			
DIK: The staff in Dickinson were amazingly friendly, helpful, and efficient.			
FAR: We love FAR! We are annual travelers to Kenora, ON and have traveled through ND for the last 10 years.			
Suggested Areas of Improvement			
Offered Suggested Improvements		62%	
Common Themes Presented in Suggested Improvements			
More food options post security including coffee shops and restaurant that can accommodate various food allergies.			
Decreased TSA wait times and broadening TSA hours of operation.			
More connectivity and direct flight options (frequently noted: Chicago, Seattle, Salt Lake City, Florida, and Texas)			
Increase staffing at airline counters to assist with checking baggage and questions.			
Importance of the Airport to the Community			
100% so important. I could not live and work here without this airport.			Surveys specified how essential airports are in supporting the oil industry!
100% important for business, family, and tourism. All airports in ND are important.			
Absolutely critical. A viable airport is always important to a communities growth.			
Absolutely IMPERATIVE!! Airports bring in new businesses and more people with them.			
Alternate Airport			
Percent of passengers that have chosen another airport in the past three years:		31%	
Commonly Cited Reasons for Choosing Another Airport in the Past Three Years:			
Cost, Flight Times, Driving is cheaper.			
Direct flights were not offered to destination.			
MSP and DEN were the most commonly chosen alternate airport for their affordability and international reach.			

Source: Kimley-Horn, 2026.

As mentioned in **Section 9.2.3.2**, the commercial service passenger surveying analysis captured new spending within North Dakota and not spending circulating or exiting the state. Visitor profile and expenditure data were collected only from survey respondents who indicated they were traveling to North Dakota from out of state.

Information was gathered across three primary categories: visitor profile characteristics, visitor expenditures, and visitor experience. **Table 9-5** provides an overview of the data collected for each of these categories.

Table 9-5. Commercial Service Passenger Survey Data Categories

Survey Category	Data Collected
Visitor Profile	Travel origin, trip purpose (business or leisure), party size, length of stay, and airport used
Expenditures	Estimated spending by category (i.e., lodging, food and beverage, transportation, retail, entertainment, recreation, or other)
Visitor Experience	Passenger feedback related to airport facilities, services, and overall travel experience

Source: Kimley-Horn, 2026.

Visitor profile characteristics and expenditure data provided the information needed to calculate direct inputs for the AEIS. Visitor experience data were not incorporated into the economic impact calculations; instead, these data were collected to provide supplemental context for airport sponsors and stakeholders regarding passenger perceptions and overall experience at each commercial service airport.

9.3.1.4. General Aviation Visitor Data Collection

As with commercial service visitors, estimating GA impacts required determining both the number of true GA visitors and their associated spending.

Because official passenger data are not available for GA operations, airport managers and FBOs were asked to estimate total annual itinerant (non-local) operations, as well as the percentage of those operations that are out-of-state. These percentages were applied to annual itinerant operations to estimate the number of out-of-state operations, which were then divided by two to approximate annual transient departures. Managers and FBOs also provided estimates of average passengers per aircraft, which were multiplied by the number of transient departures to estimate total true GA visitors at each airport. When airports were unable to provide reliable estimates, gaps were filled through coordination with NDAC and review of comparable data from the 2015 NDAEIS.

Due to the nature of GA activity, it is often difficult to obtain sufficient sample sizes to directly estimate visitor spending. As a result, spending estimates from the 2015 NDAEIS were updated in coordination with NDAC. An average spending value per GA visitor was first established for



commercial service and GA airports based on spending data from the 2015 NDAEIS, then these averages were increased by 33 percent to reflect changes in costs based on the Bureau of Labor Statistics (BLS) Consumer Price Index (CPI). As shown in **Table 9-6** commercial service airports in the 2015 NDAEIS had an average GA visitor spending of \$193 per trip. After applying the CPI adjustment, the 2025 NDAEIS estimated statewide average spending per trip for GA passengers at commercial service airports increased to \$256. In contrast, GA visitors traveling via GA airports spent \$78 per trip, on average, in the 2015 NDAEIS. After the CPI adjustment, the statewide average for GA visitors at GA airports was estimated at \$104 for the 2025 NDAEIS.

Table 9-6. CIP Adjusted Statewide GA Visitor Spending Averages

Airport Category	2015 Spending per Visitor	CPI Adjustment	2025 Spending per Visitor
Commercial Service	\$193	33%	\$256
General Aviation	\$78	33%	\$104

Sources: 2015 NDAEIS; U.S. Bureau of Labor Statistics (BLS); Kimley-Horn, 2026.

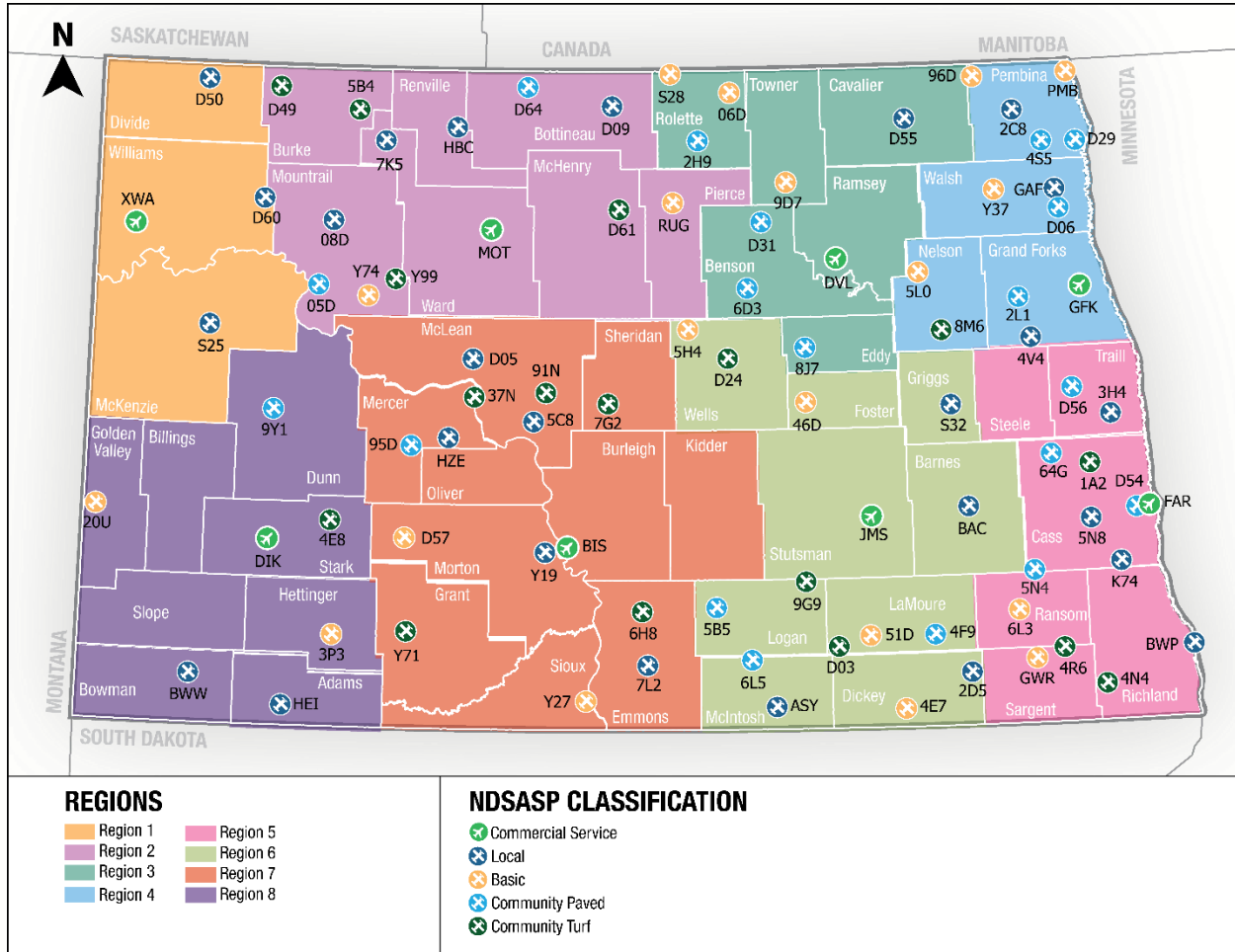
As shown in **Table 9-7**, regional adjustment factors were then applied to the 2025 NDAEIS statewide averages to account for geographic variation in visitor spending across North Dakota's eight regions. As with the regional factor analysis for commercial service visitor spending, these factors are derived from average wages per employee in visitor-related industries and reflect differences in local economic conditions, cost of living, and commercial activity levels. The regional factor analysis allows for GA visitor spending estimates to accurately reflect local economic conditions rather than applying a uniform statewide assumption. **Figure 9-3** presents a map of the regions and the airports within each for additional content.

Table 9-7. Regional Spending Adjustments for GA Visitors

Region	% of State Average	Spending per Trip by GA Visitors at GA Airports	Spending per Trip by GA Visitors at Commercial Service Airports
Region 1	104%	\$108	\$267
Region 2	87%	\$90	\$222
Region 3	86%	\$89	\$221
Region 4	92%	\$96	\$237
Region 5	117%	\$121	\$300
Region 6	87%	\$90	\$222
Region 7	92%	\$95	\$235
Region 8	94%	\$98	\$242

Sources: IMPLAN, 2025; Kimley-Horn, 2026.

Figure 9-3. Statewide Regional Map



Sources: North Dakota Commerce, Regional Councils, 2026; ArcGIS, 2026; Kimley-Horn, 2026.

9.3.2. Airport Site Visits

Airport site visits served as the primary coordination point for confirming data needs, collecting requested data, documenting next steps, and initiating post-visit outreach necessary to complete the economic impact data collection effort. Because data for the study were gathered from both airport sponsors and on-airport business tenants, a structured follow-up after each site visit was required to ensure all relevant parties were contacted and provided the opportunity to submit required information.

Airport site visits were conducted for all 89 public-use airports across North Dakota. In-person site visits were completed at the state's eight commercial service airports, while virtual site visits were conducted for the remaining 81 GA airports. Each site visit and accompanying AMS materials were coordinated with the airport manager or an equivalent representative at least two weeks before the site visit, allowing review and potential completion of the AMS prior to the scheduled visit.



During site visits, surveyors reviewed AMS responses with airport sponsors to ensure completeness and consistency, and to avoid duplication across data fields. For example, if an FBO is responsible for the day-to-day operation of the airport, their employment could be counted as either the airport administrative staff or business tenant staff, as they fall under the same category, but not both.

At commercial service airports, surveyors also requested security badge lists to support business tenant information included in the Excel spreadsheet. In addition, surveyors requested permission to place commercial service passenger survey posters with QR codes in high-traffic terminal areas to encourage passenger participation.

In cases where AMS data or tenant employment information remained incomplete following the site visit, airport managers received targeted follow-up emails identifying specific data gaps. For on-airport businesses that did not respond to the Business Tenant Survey, follow-up phone calls were conducted to encourage participation and obtain employment estimates at a minimum. Each airport's site visit was considered complete upon completion of the AMS, including estimated employment for all on-airport business tenants.

9.3.3. Data Validation

Given the statewide scope of the study and the reliance on survey-based data collected from multiple sources, a structured data validation process was implemented to ensure accuracy and consistency across all airports. This process was designed to confirm survey responses, resolve incomplete or inconsistent information, and document instances where data were not provided.

To further strengthen the dataset, secondary data sources, such as ESRI Business Analyst, FAA databases, IMPLAN, airport records, visitor and tourism studies, and other publicly available datasets, were compared to survey data, as appropriate, to support validation efforts and address identified data gaps. The integration of secondary data helped support a more complete and representative accounting of aviation activity, particularly for smaller airports and businesses with limited survey participation.

This validation process was critical in supporting the AEIS results presented in this chapter and in applying a consistent methodology across all 89 public-use airports. Validation procedures differed for on-airport and off-airport data, as described in the following sections.

9.3.3.1. On-Airport Data

Following completion of each airport's AMS and prior to economic modeling, all datasets were aggregated into a centralized database and subjected to a structured quality control review. Key data points—including employment, payroll, business activity, and capital expenditures—were evaluated for completeness, internal consistency, and alignment with airport size, function, and historical trends. Data entries identified as incomplete, inconsistent, or disproportionate were flagged for further review.



NDAC staff supported this effort by reviewing compiled data, applying institutional knowledge of airport operations, and assisting in the resolution of data gaps. Where necessary, follow-up coordination with airport sponsors and on-airport businesses was conducted to confirm or refine reported values. All airports were given an opportunity to review the direct data inputs specific to their airport before data was considered final.

9.3.3.2. Off-Airport Data

A separate validation process was conducted for commercial service passenger survey data used to estimate visitor spending impacts. Survey responses were reviewed to identify invalid entries (e.g., incomplete or logically inconsistent responses). Errant data that did not align with survey intent and statistical outliers that could disproportionately influence results were removed from the dataset before analysis.

Following data cleaning, final sample sizes and expenditure patterns were evaluated to calculate the estimated spend per visitor. The resulting visitor spending data were reviewed by both the project team and NDAC before integration into the economic impact analysis.

9.4. Applying IMPLAN and the Economic Modeling Process

Once survey data were collected and reviewed as described in **Section 9.3.3**, IMPLAN was used to assist in estimating direct impacts based on a regional calculation, filling in direct data that is not readily reportable, aggregating industry sectors, and estimating multiplier impacts.

IMPLAN is one of the most widely used input-output modeling platforms in the United States and draws on data from the U.S. Department of Commerce, Bureau of Economic Analysis (BEA), BLS, and U.S. Census Bureau. The model incorporates key economic metrics—including employment, payroll, value added, and business output—across 546 industry classifications that align with two- to six-digit North American Industry Classification System (NAICS) codes.

Activity reported through surveys, as well as activity related to capital expenditures and visitor spending, were classified into one of the 546 IMPLAN industry sectors to accurately represent economic impacts. In some instances, aggregated industry sectors were compiled to reflect a mix of industries associated with one activity, such as accounting for full-service, limited service, and other food and beverage services.

9.4.1. Filling in Direct Data Inputs

Surveys implemented throughout the data collection process collected readily available information from airports, on-airport businesses, and visitors. IMPLAN was used to supplement these inputs by estimating non-readily available data and developing a complete direct data set. Specifically, IMPLAN uses reported survey data in combination with region-specific industry relationships to estimate direct measures of jobs, payroll, value added, and output, as described subsequently.



Jobs: On-airport job figures were primarily obtained directly from airport management and on-airport business tenants through the survey process. These reported values reflect respondent-provided headcounts. Employment associated with capital expenditure activity and visitor spending was estimated in IMPLAN based on direct spending inputs. IMPLAN uses those direct spending inputs and associated industries to derive jobs, payroll, value added, and total output.

Payroll: Payroll information for airport administrative staff was collected directly. For all other categories, including on-airport tenants, capital expenditure activity, contracted services, and visitor-supported activity, payroll was estimated using IMPLAN based on employment or direct spending inputs.

Tenant surveys collected employment data, which—along with industry classifications—were input into IMPLAN to estimate payroll using region- and industry-specific wage relationships. For contracted services, capital expenditures, and visitor-supported activity, identified direct spending and corresponding industry assignments were input into IMPLAN to estimate both payroll and employment, again based on these relationships.

This approach avoids reliance on self-reported tenant payroll data while maintaining consistency across airports and activity types.

Value Added: Value added data is not available from the data collection process and was estimated using IMPLAN's value-added-to-output relationships. These ratios reflect region- and industry-specific production structures and are a standard component of IMPLAN-based impact analysis. This is a standard process given this data is calculated and not directly available from any other source.

Output: Output estimates were developed using a combination of reported and modeled inputs. Airport administrative operating expenses and capital expenditures were provided directly by airports. Visitor spending was obtained through passenger survey responses and other secondary assessments as described in **Section 9.3.1.4**. For on-airport business tenants, output was estimated by IMPLAN based on reported employment levels and associated industry production relationships.

9.4.2. Regional Calibration

To better reflect differences in economic conditions across the state, IMPLAN models for the 2025 NDAEIS were configured at the North Dakota Department of Commerce (NDOC) regional level. This regional calibration accounts for variation in payroll, productivity, and industry structure across North Dakota communities and improves the representation of local economic activity when direct financial measures are not available.

For example, when estimating direct inputs, such as output, for FBOs across the state, an FBO located at Hector International Airport (FAR) serving large corporate aircraft is expected to generate higher output and payroll per job than an FBO at Cavalier Municipal Airport (2CB),



which primarily supports piston aircraft operations. This difference reflects the underlying regional economic conditions, as FAR is situated in a higher-activity economic region. Accordingly, the IMPLAN-derived output and payroll estimates for the FBO at FAR are higher than those for a comparable operation at 2CB, despite both being assigned to the same industry classification.

9.4.3. Aggregating Industry Sectors

Many on-airport businesses can be accurately represented using individual industry sectors based on reported business descriptions; however, there are some activities that require aggregation of multiple sectors to accurately reflect the range of economic activity associated with the spending. Using a single IMPLAN sector for these activities does not fully capture the diverse components of the associated expenditures. Aggregation involves combining closely related industry sectors to represent broader categories of economic activity. This approach enhances the modeling process and supports consistent analysis, particularly when detailed data are unavailable or when results are presented at a statewide level. For the 2025 NDAEIS, commonly reported on-airport activities, such as capital expenditures, government, retail, and food and beverage, were modeled using multiple IMPLAN sectors and aggregated to reflect the full range of associated economic activity.

In terms of off-airport visitor spending industries, individual tourism-related expenditures were grouped into broader categories such as lodging, food service, transportation, retail, and entertainment to enhance reporting and improve consistency. For example, a restaurant may offer both full-service dining and limited-service takeout, which are categorized separately within IMPLAN. Because visitor spending data were collected at the category level (e.g., total food and beverage spending), activity was not allocated to individual IMPLAN sub-sectors. Instead, to reflect these combined operations, the activity was aggregated across the applicable IMPLAN sectors and applied to the reported activity.

A similar approach was used for capital expenditures, which often span multiple industry sectors rather than aligning with a single IMPLAN category. For example, airport capital improvement projects such as terminal upgrades, hangar construction, or airfield improvements can include a range of costs related to general construction, architectural and engineering services, site preparation, and specialty trade contractors. Because these expenditures represent a combination of activities, they were distributed across the relevant IMPLAN sectors and aggregated to reflect the full scope of economic activity associated with each project.

9.4.4. Estimating Multiplier Impacts

After filling in and estimating all direct impacts, IMPLAN was used to calculate the multiplier effects associated with direct activity. IMPLAN applies state-specific economic multipliers to estimate multiplier (indirect and induced) impacts, capturing how aviation-related spending circulates through the North Dakota economy. This analysis used state-specific multipliers

rather than the region-specific multipliers previously discussed, as regionality is accounted for in direct data inputs. These statewide multiplier effects provide a more comprehensive measure of the total economic contribution of aviation to the state as a whole by accounting for supply chain activity and household spending supported by direct impacts that occur in North Dakota.

9.5. Core Airport Economic Impact Findings

The 2025 NDAEIS quantified two types of impacts: core and supplemental. The core economic impacts presented in this section are related to the 89 public-use airports and are derived from airport administration, airport business tenants, airport and tenant capital expenditures, and visitor spending at both the statewide and individual airport levels. The methodology presented in **Section 9.3** is largely specific to the core impacts. Supplemental impacts reflect additional off-airport impacts, with the methodology and results of these impacts presented in **Section 9.6**.

9.5.1. Statewide Airport Economic Impact Findings

Statewide core impacts are presented by impact location, distinguishing between on-airport and off-airport activities.

9.5.1.1. On-Airport Impacts

On-airport impacts refer to the employment, payroll, value added, and output generated by activity sources occurring on airport property, including airport administration, on-airport business tenants, and capital improvement projects. In 2024, on-airport activity was responsible for approximately 61 percent of the total core impacts, highlighting the importance of on-airport employment and operations. On-airport impacts are presented by category of impact.

Airport Administration

Airport administrative employees are responsible for the day-to-day operation and management of North Dakota's public-use airports and generate additional economic activity through multiplier effects associated with their employment and expenditures.

In 2024, North Dakota airports reported 244 direct airport administrative employees. These employees support an additional 198 jobs through multiplier impacts, resulting in a total of 442 jobs statewide. Collectively, these jobs are associated with \$25.7 million in payroll, \$53.2 million in value added, and \$79.2 million in total economic output.

Airport administration impacts represent approximately seven percent of the total on-airport impacts and are summarized in **Table 9-8**.



Table 9-8. Airport Administration Impacts

Impact Category	Jobs	Payroll	Value Added	Output
Direct	244	\$13,681,000	\$34,182,000	\$45,306,000
Multiplier	198	\$12,014,000	\$19,041,000	\$33,900,000
Total	442	\$25,695,000	\$53,223,000	\$79,206,000

Note: Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding. Sources: IMPLAN, 2025; Kimley-Horn, 2026.

On-Airport Business Tenants

On-airport business tenants include businesses that employ staff located on airport property. These businesses may be aviation-related, such as FBOs; maintenance, repair, and overhaul (MRO) providers; and flight schools; or non-aviation businesses, including concessions; retail establishments; and hotels. On-airport business tenants are typically the largest employers on airport property and represent the primary drivers of on-airport economic activity. In 2024, on-airport business tenants accounted for approximately 76 percent of total on-airport economic impacts statewide.

On-airport business tenant activity directly supports 4,452 jobs located on airport property. The economic activity associated with these jobs supports an additional 1,846 multiplier jobs, resulting in a total of 6,298 jobs statewide. These impacts are associated with nearly \$428.7 million in payroll, \$550.0 million in value added, and \$834.8 million in total economic output. These on-airport business tenant impacts are summarized in **Table 9-9**.

Table 9-9. On-Airport Business Tenant Impacts

Impact Category	Jobs	Payroll	Value Added	Output
Direct	4,452	\$315,795,000	\$368,142,000	\$496,395,000
Multiplier	1,846	\$112,903,000	\$181,759,000	\$338,402,000
Total	6,298	\$428,697,000	\$549,900,000	\$834,797,000

Note: Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding. Sources: IMPLAN, 2025; Kimley-Horn, 2026.

Capital Improvements

Capital improvement activity includes construction and development projects undertaken by airports and their tenants to maintain, expand, or enhance airport facilities and infrastructure. These projects generate substantial short-term economic activity through construction employment, professional services, and the purchase of goods and materials, while also supporting long-term airport functionality and economic competitiveness. As previously discussed, airports and tenants were requested to provide annual capital expenditures from 2021 through 2024, and an annual average was developed to estimate the economic impacts.



Spending on capital improvement projects at North Dakota's airports supported 616 direct jobs associated with construction and related activities. The economic activity generated by these projects supported an additional 309 indirect and induced jobs through multiplier effects, resulting in a total of 924 jobs statewide. Collectively, capital improvement activity was associated with \$63.6 million in payroll, \$98.3 million in value added, and \$182.5 million in total economic output.

Capital improvement impacts support approximately 16 percent of the total on-airport impacts as reflected in **Table 9-10**.

Table 9-10. Capital Improvement Impacts

Impact Category	Jobs	Payroll	Value Added	Output
Direct	616	\$42,963,000	\$62,793,000	\$117,287,000
Multiplier	309	\$20,593,000	\$35,528,000	\$65,177,000
Total	924	\$63,556,000	\$98,321,000	\$182,464,000

Note: Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding. Sources: IMPLAN, 2025; Kimley-Horn, 2026.

9.5.1.2. Total On-Airport Impacts

On-airport activities generated substantial economic impacts across North Dakota in 2024. On-airport impacts, including airport administration, on-airport business tenants, and capital improvement activity, supported a total of 7,665 jobs statewide. This includes 5,312 direct jobs located on airport property and an additional 2,353 jobs supported through multiplier effects. These on-airport activities generated approximately \$517.9 million in payroll, \$701.4 million in value added, and \$1.1 billion in total economic output statewide.

The impacts highlighted in **Table 9-11** emphasize the significant role that on-airport operations and investment play in supporting employment, payroll, and total economic output throughout North Dakota.

Table 9-11. Total On-Airport Impacts

Impact 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

Note: Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding. Sources: IMPLAN, 2025; Kimley-Horn, 2026.

9.5.1.3. Off-Airport Impacts

Off-airport impacts refer to employment, payroll, value added, and output generated by off-airport visitor spending. These impacts represent the economic activity generated in local



communities through visitor expenditures across industries such as lodging, food and beverage, transportation, retail, and entertainment.

In 2024, off-airport activity accounted for approximately 39 percent of total core economic impacts, demonstrating the key role airports play in supporting out-of-state visitor travel and its impact on the statewide economy. Off-airport impacts are organized and presented by commercial service and GA visitor spending.

Commercial Service Visitor Spending

Commercial service visitor spending reflects the impact of these out-of-state residents spending money within North Dakota, in turn supporting direct and multiplier jobs.

Table 9-12 presents the number of visitors, direct spending per trip, and total direct visitor spending for each of the eight commercial service airports. These airports supported approximately 492,900 visitors with an average spending level of about \$670 per trip, resulting in approximately \$334.0 million in direct visitor spending.

Table 9-12. Visitor Spending per Trip by Commercial Service Airport

FAA ID	Airport	Total Visitors	Spending Per Trip	Direct Visitor Spending
BIS	Bismarck Municipal Airport	112,299	\$664	\$74,588,000
DVL	Devils Lake Regional Airport	3,951	\$591	\$2,334,000
DIK	Dickinson – Theodore Roosevelt Regional Airport	11,485	\$667	\$7,660,000
FAR	Hector International Airport	218,783	\$672	\$147,060,000
GFK	Grand Forks International Airport	33,099	\$603	\$19,959,000
JMS	Jamestown Regional Airport	4,053	\$643	\$2,607,000
MOT	Minot International Airport	65,864	\$605	\$39,819,000
XWA	Williston Basin International Airport	43,338	\$922	\$39,976,000
Total		492,872	\$671(Average)	\$334,003,000

Note: Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding. Sources: IMPLAN, 2025; Kimley-Horn, 2026.

In 2024, commercial service visitor spending directly supported 3,456 jobs statewide. The economic activity associated with these direct jobs generated an additional 1,114 jobs through multiplier effects, resulting in a total of 4,570 jobs supported across North Dakota.

Collectively, commercial service visitor spending represents 76 percent of the statewide off-airport impacts, and was associated with approximately \$179.1 million in payroll, \$288.2 million in value added, and \$532.1 million in total economic output. These impacts are detailed in **Table 9-13**.



Table 9-13. Commercial Service Visitor Spending Impacts

Impact Category	Jobs	Payroll	Value Added	Output
Direct	3,456	\$115,738,000	\$186,134,000	\$334,003,000
Multiplier	1,114	\$63,351,000	\$102,047,000	\$198,054,000
Total	4,570	\$179,088,000	\$288,181,000	\$532,057,000

Note: Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding. Sources: IMPLAN, 2025; Kimley-Horn, 2026.

GA Visitor Spending

GA visitor spending reflects expenditures made within the state by out-of-state visitors who arrive on GA aircraft. These visitors consist of pilots and passengers arriving via one of North Dakota's 89 airports, generating jobs in off-airport visitor spending industries (lodging, food and beverage, transportation, retail, and entertainment).

In 2024, GA visitor spending directly supported 1,062 jobs statewide. The economic activity associated with this spending generated an additional 340 jobs through multiplier effects, resulting in a total of 1,402 jobs supported across North Dakota. These jobs are associated with approximately \$53.8 million in payroll, \$87.5 million in value added, and \$162.4 million in total economic output.

GA visitor spending accounts for 24 percent of the total visitor spending impacts statewide and is summarized in **Table 9-14**.

Table 9-14. GA Visitor Spending Impacts

Impact Category	Jobs	Payroll	Value Added	Output
Direct	1,062	\$34,444,000	\$56,360,000	\$101,923,000
Multiplier	340	\$19,332,000	\$31,140,000	\$60,437,000
Total	1,402	\$53,775,000	\$87,500,000	\$162,361,000

Note: Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding. Sources: IMPLAN, 2025; Kimley-Horn, 2026.

9.5.1.4. Total Off-Airport Visitor Spending

Off-airport visitor spending impacts represent a substantial share of North Dakota's overall economic activity supported by aviation. In 2024, visitor spending generated by both commercial service and GA travelers accounted for approximately 39 percent of total core economic impacts statewide, demonstrating the significant role airports play in facilitating visitor travel and supporting economic activity beyond airport property.

As shown in **Table 9-15**, visitor spending supported 5,972 jobs across North Dakota, including 4,518 direct jobs and an additional 1,454 jobs generated through multiplier effects. These impacts were associated with approximately \$232.9 million in payroll, \$375.7 million in value added, and \$694.4 million in total economic output statewide.



Table 9-15. Total Off-Airport Visitor Spending Impacts

Impact 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

Note: Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding. Sources: IMPLAN, 2026; Kimley-Horn, 2026.

9.5.1.5. Total Statewide Core Airport Impacts

In 2024, aviation activity at North Dakota's public-use airports generated substantial statewide economic benefits through a combination of on-airport operations and off-airport visitor spending. On-airport activity, including airport administration, on-airport business tenants, and capital improvement projects, represented the majority of core impacts (61 percent), underscoring the importance of direct aviation employment and investment occurring on airport property.

As summarized in **Table 9-16**, on-airport and off-airport core airport impacts supported 13,637 jobs, generated \$750.8 million in payroll, \$1.1 billion in value added, and \$1.8 billion in total economic output.

Table 9-16. Total Statewide Core Airport Impacts

Impact 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

Note: Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding. Sources: IMPLAN, 2025; Kimley-Horn, 2026.

9.5.2. Individual Airport Impacts by Categories

Individual airport impacts are summarized in subsequent tables and organized by direct, multiplier, and total impacts. **Table 9-39** in **Section 9.11. Additional Tables** summarizes the direct, multiplier, and total impacts for each system airport in a single combined table.

9.5.2.1. Direct Impacts by Airport

Direct impacts refer to the jobs, payroll, value added, and total output that occur on-and off-airport as a direct result of airport administration, on-airport business tenants, capital improvements, commercial service, and GA visitor spending. Direct impacts are summarized by airport in **Table 9-17**, and organized in alphabetical order by associated city with the commercial service airports first followed by the GA airports.



Table 9-17. Direct Impacts by Airport

Associated City	Airport Name	FAA ID	Jobs	Payroll	Value Added	Output
Commercial Service						
Bismarck	Bismarck Municipal Airport	BIS	1,491	\$76,542,000	\$109,272,000	\$171,350,000
Devils Lake	Devils Lake Regional Airport	DVL	136	\$7,124,000	\$9,721,000	\$15,883,000
Dickinson	Dickinson – Theodore Roosevelt Regional Airport	DIK	321	\$21,679,000	\$27,995,000	\$42,333,000
Fargo	Hector International Airport	FAR	4,123	\$217,509,000	\$274,128,000	\$404,199,000
Grand Forks	Grand Forks International Airport	GFK	1,266	\$72,740,000	\$104,941,000	\$171,724,000
Jamestown	Jamestown Regional Airport	JMS	163	\$9,815,000	\$13,386,000	\$24,881,000
Minot	Minot International Airport	MOT	909	\$43,764,000	\$62,501,000	\$101,762,000
Williston	Williston Basin International Airport	XWA	773	\$37,258,000	\$59,028,000	\$90,749,000
General Aviation						
Arthur	Arthur Airport	1A2	<1	\$3,000	\$8,000	\$13,000
Ashley	Ashley Municipal Airport	ASY	12	\$555,000	\$699,000	\$1,225,000
Beach	Beach Airport	20U	6	\$342,000	\$518,000	\$906,000
Beulah	Beulah Municipal Airport	95D	8	\$328,000	\$360,000	\$473,000
Bottineau	Bottineau Municipal Airport	D09	9	\$500,000	\$661,000	\$1,069,000
Bowbells	Bowbells Municipal Airport	5B4	<1	\$6,000	\$13,000	\$23,000
Bowman	Bowman Regional Airport	BWW	18	\$1,509,000	\$1,679,000	\$2,120,000
Cando	Cando Municipal Airport	9D7	10	\$490,000	\$552,000	\$802,000
Carrington	Carrington Municipal Airport	46D	6	\$237,000	\$344,000	\$650,000
Casselton	Casselton Robert Miller Regional Airport	5N8	37	\$1,858,000	\$2,030,000	\$2,742,000
Cavalier	Cavalier Municipal Airport	2C8	9	\$535,000	\$640,000	\$924,000
Columbus	Columbus Municipal Airport	D49	2	\$4,000	\$6,000	\$10,000



Associated City	Airport Name	FAA ID	Jobs	Payroll	Value Added	Output
Cooperstown	Cooperstown Municipal Airport	S32	6	\$300,000	\$359,000	\$467,000
Crosby	Crosby Municipal Airport	D50	6	\$535,000	\$848,000	\$1,361,000
Drayton	Drayton Municipal Airport	D29	1	\$62,000	\$83,000	\$132,000
Dunseith	International Peace Garden Airport	S28	7	\$311,000	\$423,000	\$962,000
Edgeley	Edgeley Municipal Airport	51D	3	\$126,000	\$180,000	\$302,000
Elgin	Elgin Municipal Airport	Y71	<1	\$2,000	\$6,000	\$10,000
Ellendale	Ellendale Municipal Airport	4E7	4	\$121,000	\$181,000	\$341,000
Enderlin	Sky Haven Airport	5N4	1	\$46,000	\$83,000	\$141,000
Fessenden	Fessenden-Streibel Municipal Airport	D24	<1	\$6,000	\$13,000	\$22,000
Fort Yates	Standing Rock Airport	Y27	3	\$162,000	\$221,000	\$402,000
Gackle	Gackle Municipal Airport	9G9	<1	\$1,000	\$2,000	\$3,000
Garrison	Garrison Municipal Airport	D05	4	\$219,000	\$319,000	\$556,000
Glen Ullin	Glen Ullin Regional Airport	D57	4	\$224,000	\$346,000	\$651,000
Grafton	Hutson Field	GAF	11	\$549,000	\$801,000	\$1,407,000
Gwinner	Gwinner-Roger Melroe Field	GWR	6	\$298,000	\$443,000	\$734,000
Harvey	Harvey Municipal Airport	5H4	5	\$216,000	\$295,000	\$420,000
Hazelton	Hazelton Municipal Airport	6H8	1	\$33,000	\$54,000	\$99,000
Hazen	Mercer County Regional Airport	HZE	10	\$462,000	\$650,000	\$1,152,000
Hettinger	Hettinger – JB Lindquist Regional Airport	HEI	10	\$935,000	\$1,064,000	\$1,379,000
Hillsboro	Hillsboro Municipal Airport	3H4	20	\$1,224,000	\$1,614,000	\$2,505,000
Kenmare	Kenmare Municipal Airport	7K5	21	\$1,292,000	\$1,535,000	\$2,242,000
Killdeer	Dunn County - Weydahl Field	9Y1	6	\$354,000	\$551,000	\$932,000
Kindred	Robert Odegaard Field	K74	9	\$621,000	\$753,000	\$1,069,000
Kulm	Kulm Municipal Airport	D03	2	\$18,000	\$35,000	\$60,000



Associated City	Airport Name	FAA ID	Jobs	Payroll	Value Added	Output
LaMoure	LaMoure Rott Municipal Airport	4F9	5	\$224,000	\$254,000	\$358,000
Lakota	Lakota Municipal Airport	5L0	7	\$191,000	\$333,000	\$610,000
Langdon	Robertson Field	D55	7	\$356,000	\$445,000	\$566,000
Larimore	Larimore Municipal Airport	2L1	14	\$787,000	\$846,000	\$1,058,000
Leeds	Leeds Municipal Airport	D31	2	\$93,000	\$149,000	\$319,000
Lidgerwood	Lidgerwood Municipal Airport	4N4	<1	\$1,000	\$5,000	\$7,000
Linton	Linton Municipal Airport	7L2	7	\$380,000	\$528,000	\$857,000
Lisbon	Lisbon Municipal Airport	6L3	10	\$547,000	\$651,000	\$963,000
Maddock	Maddock Municipal Airport	6D3	5	\$248,000	\$280,000	\$388,000
Mandan	Mandan Regional - Lawler Field	Y19	34	\$2,117,000	\$2,638,000	\$3,997,000
Mayville	Mayville Municipal Airport	D56	9	\$516,000	\$593,000	\$879,000
McClusky	McClusky Municipal Airport	7G2	<1	\$3,000	\$7,000	\$12,000
McVile	McVile Municipal Airport	8M6	2	\$6,000	\$9,000	\$15,000
Milnor	Milnor Municipal Airport	4R6	<1	\$25,000	\$44,000	\$76,000
Minto	Minto Municipal Airport	D06	2	\$72,000	\$87,000	\$111,000
Mohall	Mohall Municipal Airport	HBC	12	\$639,000	\$744,000	\$1,069,000
Mott	Mott Municipal Airport	3P3	4	\$224,000	\$307,000	\$496,000
Napoleon	Napoleon Municipal Airport	5B5	6	\$146,000	\$164,000	\$236,000
New Rockford	Tomlinson Field	8J7	7	\$237,000	\$308,000	\$650,000
New Town	New Town Municipal Airport	05D	5	\$247,000	\$434,000	\$824,000
Northwood	Northwood Municipal – Vince Field	4V4	10	\$466,000	\$623,000	\$979,000
Oakes	Oakes Municipal Airport	2D5	5	\$280,000	\$324,000	\$463,000
Page	Page Regional Airport	64G	11	\$615,000	\$626,000	\$734,000
Park River	Park River – W C Skjerven Field	Y37	8	\$474,000	\$595,000	\$945,000



Associated City	Airport Name	FAA ID	Jobs	Payroll	Value Added	Output
Parshall	Parshall-Hankins Airport	Y74	6	\$190,000	\$273,000	\$520,000
Pembina	Pembina Municipal Airport	PMB	8	\$475,000	\$549,000	\$763,000
Plaza	Trulson Field	Y99	<1	\$1,000	\$3,000	\$5,000
Richardton	Richardton Municipal Airport	4E8	<1	\$2,000	\$5,000	\$8,000
Riverdale	Garrison Dam Recreational Airpark	37N	1	\$7,000	\$12,000	\$20,000
Rolette	Rolette Airport	2H9	<1	\$18,000	\$37,000	\$73,000
Rolla	Rolla Municipal Airport	06D	15	\$775,000	\$878,000	\$1,196,000
Rugby	Rugby Municipal Airport	RUG	11	\$679,000	\$788,000	\$1,164,000
St. Thomas	St. Thomas Municipal Airport	4S5	3	\$157,000	\$177,000	\$242,000
Stanley	Stanley Municipal Airport	08D	14	\$743,000	\$1,073,000	\$2,170,000
Tioga	Tioga Municipal Airport	D60	21	\$1,224,000	\$1,667,000	\$2,535,000
Towner	Towner Municipal Airport	D61	<1	\$3,000	\$8,000	\$13,000
Turtle Lake	Turtle Lake Municipal Airport	91N	<1	\$12,000	\$21,000	\$38,000
Valley City	Barnes County Municipal Airport	BAC	11	\$514,000	\$919,000	\$1,387,000
Wahpeton	Harry Stern Airport	BWP	25	\$1,468,000	\$1,740,000	\$2,470,000
Walhalla	Walhalla Municipal Airport	96D	9	\$483,000	\$581,000	\$866,000
Washburn	Washburn Municipal Airport	5C8	7	\$381,000	\$496,000	\$814,000
Watford City	Watford City Municipal Airport	S25	56	\$4,710,000	\$6,697,000	\$10,552,000
West Fargo	West Fargo Municipal Airport	D54	23	\$775,000	\$1,064,000	\$1,712,000
Westhope	Westhope Municipal Airport	D64	3	\$149,000	\$228,000	\$458,000
Wishek	Wishek Municipal Airport	6L5	3	\$45,000	\$65,000	\$111,000
Statewide Total			9,831	\$522,620,000	\$707,611,000	\$1,094,915,000

Note: Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding. Sources: IMPLAN, 2025; Kimley-Horn, 2026.



9.5.2.2. Multiplier Impacts by Airport

Multiplier impacts represent the additional employment, payroll, value added, and total economic output generated throughout the state as direct airport-related activity circulates through the broader economy. Multiplier impacts capture both indirect and induced effects and are summarized by airport in **Table 9-18**, and are organized in alphabetical order by associated city with the commercial service airports first followed by the GA airports.

Table 9-18. Multiplier Impacts by Airport

Associated City	Airport Name	FAA ID	Jobs	Payroll	Value Added	Output
Commercial Service						
Bismarck	Bismarck Municipal Airport	BIS	616	\$36,903,000	\$59,677,000	\$112,972,000
Devils Lake	Devils Lake Regional Airport	DVL	56	\$3,418,000	\$5,608,000	\$10,477,000
Dickinson	Dickinson – Theodore Roosevelt Regional Airport	DIK	149	\$9,030,000	\$14,667,000	\$27,430,000
Fargo	Hector International Airport	FAR	1,446	\$85,957,000	\$138,977,000	\$260,849,000
Grand Forks	Grand Forks International Airport	GFK	525	\$31,975,000	\$51,824,000	\$98,137,000
Jamestown	Jamestown Regional Airport	JMS	78	\$4,730,000	\$7,682,000	\$14,282,000
Minot	Minot International Airport	MOT	379	\$22,561,000	\$36,370,000	\$69,209,000
Williston	Williston Basin International Airport	XWA	326	\$19,187,000	\$30,879,000	\$58,988,000
General Aviation						
Arthur	Arthur Airport	1A2	<1	\$3,000	\$4,000	\$8,000
Ashley	Ashley Municipal Airport	ASY	4	\$227,000	\$383,000	\$700,000
Beach	Beach Airport	20U	3	\$163,000	\$278,000	\$513,000
Beulah	Beulah Municipal Airport	95D	2	\$98,000	\$159,000	\$286,000
Bottineau	Bottineau Municipal Airport	D09	3	\$212,000	\$350,000	\$644,000
Bowbells	Bowbells Municipal Airport	5B4	<1	\$5,000	\$7,000	\$14,000



Associated City	Airport Name	FAA ID	Jobs	Payroll	Value Added	Output
Bowman	Bowman Regional Airport	BWW	8	\$495,000	\$798,000	\$1,443,000
Cando	Cando Municipal Airport	9D7	3	\$157,000	\$260,000	\$470,000
Carrington	Carrington Municipal Airport	46D	2	\$123,000	\$206,000	\$383,000
Casselton	Casselton Robert Miller Regional Airport	5N8	10	\$623,000	\$1,008,000	\$1,825,000
Cavalier	Cavalier Municipal Airport	2C8	3	\$181,000	\$303,000	\$544,000
Columbus	Columbus Municipal Airport	D49	<1	\$2,000	\$3,000	\$6,000
Cooperstown	Cooperstown Municipal Airport	S32	2	\$98,000	\$159,000	\$286,000
Crosby	Crosby Municipal Airport	D50	4	\$243,000	\$416,000	\$766,000
Drayton	Drayton Municipal Airport	D29	<1	\$25,000	\$42,000	\$77,000
Dunseith	International Peace Garden Airport	S28	3	\$170,000	\$292,000	\$537,000
Edgeley	Edgeley Municipal Airport	51D	1	\$58,000	\$97,000	\$178,000
Elgin	Elgin Municipal Airport	Y71	<1	\$2,000	\$3,000	\$6,000
Ellendale	Ellendale Municipal Airport	4E7	1	\$65,000	\$108,000	\$201,000
Enderlin	Sky Haven Airport	5N4	<1	\$28,000	\$45,000	\$85,000
Fessenden	Fessenden-Streibel Municipal Airport	D24	<1	\$4,000	\$7,000	\$13,000
Fort Yates	Standing Rock Airport	Y27	1	\$74,000	\$125,000	\$230,000
Gackle	Gackle Municipal Airport	9G9	<1	\$1,000	\$1,000	\$2,000
Garrison	Garrison Municipal Airport	D05	2	\$104,000	\$174,000	\$322,000
Glen Ullin	Glen Ullin Regional Airport	D57	2	\$117,000	\$200,000	\$369,000
Grafton	Hutson Field	GAF	4	\$264,000	\$446,000	\$816,000
Gwinner	Gwinner-Roger Melroe Field	GWR	2	\$143,000	\$235,000	\$437,000
Harvey	Harvey Municipal Airport	5H4	1	\$87,000	\$142,000	\$258,000



Associated City	Airport Name	FAA ID	Jobs	Payroll	Value Added	Output
Hazleton	Hazleton Municipal Airport	6H8	<1	\$18,000	\$31,000	\$57,000
Hazen	Mercer County Regional Airport	HZE	3	\$218,000	\$367,000	\$675,000
Hettinger	Hettinger – JB Lindquist Regional Airport	HEI	5	\$315,000	\$510,000	\$923,000
Hillsboro	Hillsboro Municipal Airport	3H4	8	\$504,000	\$831,000	\$1,525,000
Kenmare	Kenmare Municipal Airport	7K5	8	\$456,000	\$746,000	\$1,360,000
Killdeer	Dunn County - Weydahl Field	9Y1	3	\$173,000	\$294,000	\$538,000
Kindred	Robert Odegaard Field	K74	4	\$235,000	\$385,000	\$697,000
Kulm	Kulm Municipal Airport	D03	<1	\$12,000	\$20,000	\$37,000
LaMoure	LaMoure Rott Municipal Airport	4F9	1	\$73,000	\$120,000	\$215,000
Lakota	Lakota Municipal Airport	5L0	2	\$114,000	\$192,000	\$355,000
Langdon	Robertson Field	D55	2	\$120,000	\$196,000	\$350,000
Larimore	Larimore Municipal Airport	2L1	4	\$223,000	\$363,000	\$647,000
Leeds	Leeds Municipal Airport	D31	1	\$59,000	\$100,000	\$183,000
Lidgerwood	Lidgerwood Municipal Airport	4N4	<1	\$2,000	\$3,000	\$5,000
Linton	Linton Municipal Airport	7L2	3	\$165,000	\$275,000	\$504,000
Lisbon	Lisbon Municipal Airport	6L3	3	\$196,000	\$323,000	\$582,000
Maddock	Maddock Municipal Airport	6D3	1	\$83,000	\$137,000	\$249,000
Mandan	Mandan Regional - Lawler Field	Y19	14	\$858,000	\$1,387,000	\$2,547,000
Mayville	Mayville Municipal Airport	D56	3	\$176,000	\$288,000	\$522,000
McClusky	McClusky Municipal Airport	7G2	<1	\$2,000	\$4,000	\$7,000
McVile	McVile Municipal Airport	8M6	<1	\$3,000	\$5,000	\$10,000
Milnor	Milnor Municipal Airport	4R6	<1	\$14,000	\$24,000	\$44,000



Associated City	Airport Name	FAA ID	Jobs	Payroll	Value Added	Output
Minto	Minto Municipal Airport	D06	<1	\$24,000	\$39,000	\$70,000
Mohall	Mohall Municipal Airport	HBC	4	\$214,000	\$352,000	\$636,000
Mott	Mott Municipal Airport	3P3	1	\$94,000	\$157,000	\$287,000
Napoleon	Napoleon Municipal Airport	5B5	1	\$47,000	\$77,000	\$139,000
New Rockford	Tomlinson Field	8J7	2	\$117,000	\$200,000	\$367,000
New Town	New Town Municipal Airport	05D	2	\$155,000	\$259,000	\$481,000
Northwood	Northwood Municipal – Vince Field	4V4	3	\$190,000	\$315,000	\$578,000
Oakes	Oakes Municipal Airport	2D5	2	\$92,000	\$152,000	\$274,000
Page	Page Regional Airport	64G	3	\$190,000	\$302,000	\$540,000
Park River	Park River - W C Skjerven Field	Y37	3	\$178,000	\$298,000	\$545,000
Parshall	Parshall-Hankins Airport	Y74	2	\$97,000	\$162,000	\$301,000
Pembina	Pembina Municipal Airport	PMB	3	\$167,000	\$271,000	\$492,000
Plaza	Trulson Field	Y99	<1	\$1,000	\$2,000	\$3,000
Richardton	Richardton Municipal Airport	4E8	<1	\$2,000	\$3,000	\$5,000
Riverdale	Garrison Dam Recreational Airpark	37N	<1	\$4,000	\$7,000	\$13,000
Rolette	Rolette Airport	2H9	<1	\$14,000	\$24,000	\$44,000
Rolla	Rolla Municipal Airport	06D	4	\$240,000	\$395,000	\$712,000
Rugby	Rugby Municipal Airport	RUG	4	\$230,000	\$379,000	\$687,000
St. Thomas	St. Thomas Municipal Airport	4S5	1	\$48,000	\$79,000	\$142,000
Stanley	Stanley Municipal Airport	08D	7	\$442,000	\$707,000	\$1,328,000
Tioga	Tioga Municipal Airport	D60	8	\$502,000	\$822,000	\$1,530,000
Towner	Towner Municipal Airport	D61	<1	\$3,000	\$4,000	\$8,000



Associated City	Airport Name	FAA ID	Jobs	Payroll	Value Added	Output
Turtle Lake	Turtle Lake Municipal Airport	91N	<1	\$7,000	\$12,000	\$22,000
Valley City	Barnes County Municipal Airport	BAC	5	\$298,000	\$486,000	\$882,000
Wahpeton	Harry Stern Airport	BWP	9	\$535,000	\$869,000	\$1,579,000
Walhalla	Walhalla Municipal Airport	96D	3	\$168,000	\$279,000	\$507,000
Washburn	Washburn Municipal Airport	5C8	2	\$154,000	\$259,000	\$471,000
Watford City	Watford City Municipal Airport	S25	31	\$1,974,000	\$3,323,000	\$6,122,000
West Fargo	West Fargo Municipal Airport	D54	6	\$347,000	\$565,000	\$1,083,000
Westhope	Westhope Municipal Airport	D64	1	\$82,000	\$140,000	\$257,000
Wishek	Wishek Municipal Airport	6L5	<1	\$23,000	\$37,000	\$70,000
Statewide Total			3,807	\$228,192,000	\$369,515,000	\$695,970,000

Note: Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding. Sources: IMPLAN, 2025; Kimley-Horn, 2026.

9.5.2.3. Total Impacts by Airport

The total impacts of each airport are summarized in **Table 9-19** and represent the sum of the direct and multiplier impacts listed previously. Airports are organized in alphabetical order by associated cities with the commercial service airports first followed by the GA airports.

Table 9-19. Total Impacts by Airport

Associated City	Airport Name	FAA ID	Jobs	Payroll	Value Added	Output
Commercial Service						
Bismarck	Bismarck Municipal Airport	BIS	2,107	\$113,445,000	\$168,949,000	\$284,322,000
Devils Lake	Devils Lake Regional Airport	DVL	192	\$10,542,000	\$15,329,000	\$26,360,000
Dickinson	Dickinson – Theodore Roosevelt Regional Airport	DIK	470	\$30,709,000	\$42,661,000	\$69,764,000



Associated City	Airport Name	FAA ID	Jobs	Payroll	Value Added	Output
Fargo	Hector International Airport	FAR	5,569	\$303,467,000	\$413,105,000	\$665,048,000
Grand Forks	Grand Forks International Airport	GFK	1,791	\$104,715,000	\$156,765,000	\$269,861,000
Jamestown	Jamestown Regional Airport	JMS	241	\$14,544,000	\$21,068,000	\$39,164,000
Minot	Minot International Airport	MOT	1,288	\$66,325,000	\$98,871,000	\$170,971,000
Williston	Williston Basin International Airport	XWA	1,099	\$56,446,000	\$89,907,000	\$149,737,000
General Aviation						
Arthur	Arthur Airport	1A2	<1	\$6,000	\$12,000	\$21,000
Ashley	Ashley Municipal Airport	ASY	15	\$782,000	\$1,082,000	\$1,926,000
Beach	Beach Airport	20U	8	\$505,000	\$796,000	\$1,419,000
Beulah	Beulah Municipal Airport	95D	10	\$426,000	\$519,000	\$759,000
Bottineau	Bottineau Municipal Airport	D09	13	\$713,000	\$1,011,000	\$1,712,000
Bowbells	Bowbells Municipal Airport	5B4	<1	\$11,000	\$20,000	\$37,000
Bowman	Bowman Regional Airport	BWW	27	\$2,004,000	\$2,478,000	\$3,563,000
Cando	Cando Municipal Airport	9D7	12	\$647,000	\$812,000	\$1,272,000
Carrington	Carrington Municipal Airport	46D	8	\$360,000	\$550,000	\$1,033,000
Casselton	Casselton Robert Miller Regional Airport	5N8	48	\$2,482,000	\$3,038,000	\$4,567,000
Cavalier	Cavalier Municipal Airport	2C8	11	\$716,000	\$943,000	\$1,467,000
Columbus	Columbus Municipal Airport	D49	2	\$6,000	\$9,000	\$16,000
Cooperstown	Cooperstown Municipal Airport	S32	8	\$398,000	\$518,000	\$754,000
Crosby	Crosby Municipal Airport	D50	10	\$779,000	\$1,264,000	\$2,127,000
Drayton	Drayton Municipal Airport	D29	1	\$87,000	\$126,000	\$209,000
Dunseith	International Peace Garden Airport	S28	10	\$481,000	\$715,000	\$1,499,000



Associated City	Airport Name	FAA ID	Jobs	Payroll	Value Added	Output
Edgeley	Edgeley Municipal Airport	51D	3	\$184,000	\$277,000	\$480,000
Elgin	Elgin Municipal Airport	Y71	<1	\$4,000	\$10,000	\$17,000
Ellendale	Ellendale Municipal Airport	4E7	5	\$186,000	\$289,000	\$542,000
Enderlin	Sky Haven Airport	5N4	1	\$74,000	\$128,000	\$226,000
Fessenden	Fessenden-Streibel Municipal Airport	D24	<1	\$10,000	\$20,000	\$35,000
Fort Yates	Standing Rock Airport	Y27	4	\$235,000	\$346,000	\$632,000
Gackle	Gackle Municipal Airport	9G9	<1	\$1,000	\$3,000	\$5,000
Garrison	Garrison Municipal Airport	D05	6	\$323,000	\$494,000	\$878,000
Glen Ullin	Glen Ullin Regional Airport	D57	6	\$342,000	\$546,000	\$1,021,000
Grafton	Hutson Field	GAF	15	\$813,000	\$1,247,000	\$2,222,000
Gwinner	Gwinner-Roger Melroe Field	GWR	9	\$441,000	\$678,000	\$1,171,000
Harvey	Harvey Municipal Airport	5H4	7	\$304,000	\$438,000	\$677,000
Hazelton	Hazelton Municipal Airport	6H8	1	\$51,000	\$84,000	\$156,000
Hazen	Mercer County Regional Airport	HZE	14	\$680,000	\$1,017,000	\$1,826,000
Hettinger	Hettinger – JB Lindquist Regional Airport	HEI	15	\$1,249,000	\$1,574,000	\$2,303,000
Hillsboro	Hillsboro Municipal Airport	3H4	28	\$1,728,000	\$2,445,000	\$4,030,000
Kenmare	Kenmare Municipal Airport	7K5	29	\$1,748,000	\$2,280,000	\$3,602,000
Killdeer	Dunn County - Weydahl Field	9Y1	9	\$527,000	\$844,000	\$1,470,000
Kindred	Robert Odegaard Field	K74	13	\$856,000	\$1,138,000	\$1,766,000
Kulm	Kulm Municipal Airport	D03	2	\$30,000	\$55,000	\$96,000
LaMoure	LaMoure Rott Municipal Airport	4F9	6	\$296,000	\$374,000	\$573,000
Lakota	Lakota Municipal Airport	5L0	8	\$305,000	\$525,000	\$966,000



Associated City	Airport Name	FAA ID	Jobs	Payroll	Value Added	Output
Langdon	Robertson Field	D55	9	\$476,000	\$640,000	\$916,000
Larimore	Larimore Municipal Airport	2L1	18	\$1,010,000	\$1,209,000	\$1,706,000
Leeds	Leeds Municipal Airport	D31	3	\$151,000	\$249,000	\$502,000
Lidgerwood	Lidgerwood Municipal Airport	4N4	<1	\$3,000	\$7,000	\$12,000
Linton	Linton Municipal Airport	7L2	10	\$545,000	\$803,000	\$1,361,000
Lisbon	Lisbon Municipal Airport	6L3	14	\$743,000	\$974,000	\$1,545,000
Maddock	Maddock Municipal Airport	6D3	6	\$331,000	\$418,000	\$637,000
Mandan	Mandan Regional - Lawler Field	Y19	48	\$2,974,000	\$4,025,000	\$6,544,000
Mayville	Mayville Municipal Airport	D56	12	\$692,000	\$881,000	\$1,401,000
McClusky	McClusky Municipal Airport	7G2	<1	\$5,000	\$11,000	\$19,000
McVile	McVile Municipal Airport	8M6	2	\$10,000	\$15,000	\$25,000
Milnor	Milnor Municipal Airport	4R6	1	\$40,000	\$68,000	\$120,000
Minto	Minto Municipal Airport	D06	3	\$96,000	\$126,000	\$181,000
Mohall	Mohall Municipal Airport	HBC	16	\$853,000	\$1,096,000	\$1,705,000
Mott	Mott Municipal Airport	3P3	5	\$318,000	\$464,000	\$783,000
Napoleon	Napoleon Municipal Airport	5B5	6	\$193,000	\$241,000	\$374,000
New Rockford	Tomlinson Field	8J7	8	\$355,000	\$508,000	\$1,018,000
New Town	New Town Municipal Airport	05D	8	\$401,000	\$693,000	\$1,304,000
Northwood	Northwood Municipal – Vince Field	4V4	13	\$656,000	\$938,000	\$1,556,000
Oakes	Oakes Municipal Airport	2D5	7	\$372,000	\$476,000	\$738,000
Page	Page Regional Airport	64G	14	\$805,000	\$928,000	\$1,274,000
Park River	Park River - W C Skjerven Field	Y37	11	\$653,000	\$893,000	\$1,490,000



Associated City	Airport Name	FAA ID	Jobs	Payroll	Value Added	Output
Parshall	Parshall-Hankins Airport	Y74	7	\$287,000	\$435,000	\$821,000
Pembina	Pembina Municipal Airport	PMB	10	\$642,000	\$820,000	\$1,255,000
Plaza	Trulson Field	Y99	<1	\$2,000	\$5,000	\$8,000
Richardton	Richardton Municipal Airport	4E8	<1	\$3,000	\$7,000	\$12,000
Riverdale	Garrison Dam Recreational Airpark	37N	1	\$11,000	\$18,000	\$32,000
Rolette	Rolette Airport	2H9	1	\$33,000	\$61,000	\$117,000
Rolla	Rolla Municipal Airport	06D	19	\$1,015,000	\$1,273,000	\$1,908,000
Rugby	Rugby Municipal Airport	RUG	15	\$908,000	\$1,167,000	\$1,851,000
St. Thomas	St. Thomas Municipal Airport	4S5	3	\$205,000	\$256,000	\$384,000
Stanley	Stanley Municipal Airport	08D	21	\$1,185,000	\$1,779,000	\$3,498,000
Tioga	Tioga Municipal Airport	D60	30	\$1,726,000	\$2,488,000	\$4,065,000
Towner	Towner Municipal Airport	D61	<1	\$6,000	\$12,000	\$21,000
Turtle Lake	Turtle Lake Municipal Airport	91N	<1	\$19,000	\$33,000	\$60,000
Valley City	Barnes County Municipal Airport	BAC	16	\$812,000	\$1,405,000	\$2,268,000
Wahpeton	Harry Stern Airport	BWP	34	\$2,003,000	\$2,609,000	\$4,049,000
Walhalla	Walhalla Municipal Airport	96D	12	\$651,000	\$860,000	\$1,373,000
Washburn	Washburn Municipal Airport	5C8	9	\$535,000	\$754,000	\$1,285,000
Watford City	Watford City Municipal Airport	S25	87	\$6,684,000	\$10,020,000	\$16,674,000
West Fargo	West Fargo Municipal Airport	D54	29	\$1,122,000	\$1,629,000	\$2,795,000
Westhope	Westhope Municipal Airport	D64	4	\$231,000	\$368,000	\$715,000
Wishek	Wishek Municipal Airport	6L5	3	\$68,000	\$102,000	\$181,000
Statewide Total			13,637	\$750,812,000	\$1,077,126,000	\$1,790,885,000

Note: Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding. Sources: IMPLAN, 2025; Kimley-Horn, 2026.

9.6. Supplemental Off-Airport Impact Findings

This section summarizes supplemental off-airport aviation impacts that are relevant to North Dakota's aviation economy but are not fully captured in the core airport impact estimates presented in **Section 9.5**. These analyses are presented separately to avoid double-counting because they rely on distinct data sources and assumptions. Supplemental components evaluated in this section include the University of North Dakota School of Aerospace Sciences (UND Aerospace), off-airport aircraft/aerospace manufacturing activity, off-airport UAS business activity, and economic impacts reported for Grand Forks and Minot Air Force Bases, as well as an estimate of potential economic losses associated with aviation workforce challenges.

9.6.1. Off-Airport University of North Dakota School of Aerospace Sciences Impacts

Located in Grand Forks, UND Aerospace is an important part of North Dakota's broader aviation industry, supporting aviation education, flight training, and UAS-related instruction and research. UND Aerospace conducts activities both on the University of North Dakota campus and at Grand Forks International Airport (GFK), with flight training operations occurring at the airport and academic and administrative functions based on campus. UND Aerospace is one of UND's largest programs, with more than 2,100 full-time enrolled students, and operates one of the largest civilian flight training fleets in North America (more than 110 aircraft and simulators) with over 110,000 annual flight hours, logging more than 212,294 operations in 2025.

The assessment of UND Aerospace's impacts was conducted as part of the 2025 NDAEIS in partnership between NDAC and UND. It is important to note that the following analysis focuses solely on off-airport impacts related to UND Aerospace since the on-airport activity associated with UND Aerospace is included within GFK's core impacts and the core statewide impacts as presented in **Section 9.5**. The following analysis represents a high-level analysis compared to a more detailed economic impact study that may be commissioned by and specific to UND's full operations. The analysis presented in this section is limited to the School of Aerospace Sciences. The following subsections outline the methodology, key assumptions, and results of this analysis.

9.6.1.1. Methodology and Assumptions

The analysis of UND Aerospace's off-airport economic impacts includes an assessment of the off-airport operations of the program, as well as the off-campus spending associated with UND Aerospace students. Both of these assessments are documented in the following sections.

UND Aerospace's off-airport operations include the economic activity associated with jobs, payroll, capital improvements, and annual operating expenses generated by the program. This includes campus-based instruction and administrative functions but does not include staff or operations occurring on-airport at GFK.

To support this analysis, the study team met with UND staff in person to collect detailed information specific to off-airport employment, payroll, capital expenditures, and operating expenses. The same IMPLAN modeling framework used to estimate the core airport impacts (as described in **Section 9.5**) was applied to estimate the economic impacts associated with UND Aerospace's off-airport operations, ensuring methodological consistency for the study.

The second component of the analysis estimated the economic impact of off-campus spending by UND Aerospace students, including those attending only flight training at GFK, only on-campus classes, and those participating in both. This required estimating how many students relocated to the Grand Forks area specifically to attend the program, as local students do not introduce new spending to the regional economy.

The analysis also differentiated between on- and off-campus residents, since off-campus students generate higher levels of local spending, particularly for housing, transportation, and other non-university services. UND Aerospace staff provided estimates of the applicable student population, defined as students who relocated to attend the program, along with their housing distribution. Based on this input, approximately 97 percent of UND Aerospace students relocated to Grand Forks, and of these students, about 67 percent live off campus and 33 percent live on campus.

Typical student spending was estimated using an 11-month academic period, reflecting the average length of stay for UND Aerospace students in the Grand Forks area, as many remain in the community during the summer for coursework, internships, or other activities.³ Moderate off-campus student budgets published by CollegeBoard.org were used as the primary data source. Because CollegeBoard.org does not publish North Dakota-specific budgets, the reported expenditures at the national level were adjusted using BLS Regional Price Parities to better reflect local cost-of-living conditions. The published nine-month budgets were converted to monthly amounts and expanded to represent an 11-month spending period.

To account for spending by students living on campus, the off-campus spending estimate was further adjusted using CollegeBoard.org-provided expenditure breakdowns. Based on these data, it was assumed that approximately 25 percent of off-campus student spending could be attributed to off-campus spending by on-campus students.

Unlike other components of this study, the economic impacts associated with student spending were estimated using IMPLAN's Household Spending module. This module traces how income paid to households is spent within the local economy and estimates the resulting induced economic effects. As a result, the student spending analysis captures induced impacts only and does not include direct or indirect impacts, which are generated through industry production and

³ The 11-month academic year was estimated by UND Aerospace staff. It may or may not reflect a typical academic year of UND students who are not enrolled in the Aerospace program.

supply-chain relationships. This approach avoids double counting and allows induced impacts associated with student spending to be estimated transparently and consistently with other study components.

9.6.1.2. Results

The economic impacts associated with off-airport UND Aerospace operations and student spending are summarized in **Table 9-20**. Results are presented separately to distinguish institutional off-airport operations from student spending.

As shown in **Table 9-20**, off-airport UND Aerospace operations supported 337 direct jobs, generating approximately \$18.8 million in payroll and \$33.8 million in direct output. When multiplier effects are included, these activities supported a total of 461 jobs and approximately \$56.4 million in total economic output.

Student spending impacts reflect household spending by students who relocated to the Grand Forks area to attend UND Aerospace and are therefore estimated as induced impacts only. This spending supported an estimated 295 jobs and generated approximately \$46.6 million in total economic output.

When all off-airport UND Aerospace-related sources are combined, the program supported a total of 756 jobs, generated approximately \$42.6 million in payroll, contributed \$59.0 million in value added, and produced more than \$103.1 million in total economic output. These results demonstrate that UND's aerospace programs generate substantial economic activity beyond airport property through both operations and student-driven spending.

Table 9-20. Off-Airport Economic Impacts of the UND School of Aerospace Sciences

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

Notes: * To avoid double counting impacts already captured in the 2025 NDAEIS, these results are limited to induced impacts, representing household spending effects only. Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding.

Sources: IMPLAN, 2025; Kimley-Horn, 2026.

9.6.2. Off-Airport Aircraft/Aerospace Manufacturing Impacts

North Dakota has a growing and increasingly diverse aircraft and aerospace manufacturing sector that supports the state's broader aviation ecosystem. This activity includes the design, production, maintenance, and support of aircraft, aircraft components, and related aerospace technologies, as well as firms engaged in specialized manufacturing, research, and defense-related aviation work. While some of this activity is located at the state's 89 public-use airports and captured in the on-airport business tenant impacts, a substantial portion occurs at off-airport industrial, research, and manufacturing sites across the state. These businesses contribute skilled employment opportunities, generate payroll and business output, and support supply chain activity both within North Dakota and beyond.

To provide a more complete representation of aviation's economic role in North Dakota, this study includes a separate evaluation of off-airport aircraft and aerospace manufacturing activity. These impacts are presented as a supplemental analysis to distinguish manufacturing activity that is not dependent on airport location but remains closely tied to the aviation industry.

9.6.2.1. Methodology and Assumptions

The methodological approach for this analysis focused on identifying and quantifying off-airport aircraft and aerospace manufacturing employment within the state and estimating the resulting economic impacts using a consistent modeling framework. In coordination with the NDAC, the Greater North Dakota Chamber, and North Dakota Department of Commerce, the study team compiled an inventory of aircraft and aerospace manufacturing firms operating within North Dakota. This list was carefully reviewed to remove businesses and jobs already captured in the on-airport tenant impacts or within other supplemental analyses, such as the UND Aerospace and UAS business evaluations.

To supplement this effort, additional employment data were identified using ESRI's Business Analyst tool by screening applicable aviation- and aerospace-related NAICS codes. Only firms not previously identified through stakeholder coordination were included. The final employment totals served as inputs to the IMPLAN economic model, which was used to estimate direct payroll, value added, and output, as well as associated multiplier impacts. This approach ensures methodological consistency with the core airport economic impact analysis while providing a standalone assessment of off-airport aircraft and aerospace manufacturing activity.

9.6.2.2. Results

As shown in **Table 9-21**, off-airport aircraft and aerospace manufacturing activity supported 1,598 direct jobs statewide and generated approximately \$146.0 million in direct payroll and \$526.0 million in direct economic output. These direct impacts reflect employment and production associated with manufacturing, research, and related aviation activities occurring at off-airport facilities.

When multiplier effects are considered, including supplier purchases and employee household spending within the state, this activity supported an additional 1,025 jobs. In total, off-airport aircraft and aerospace manufacturing supported approximately 2,623 jobs, \$213.4 million in payroll, \$377.5 million in value added, and more than \$731.6 million in total economic output. These results underscore the significant role that off-airport manufacturing aviation and aerospace plays in supporting North Dakota's economy beyond airport boundaries.

Table 9-21. Off-Airport Aircraft and Aerospace Manufacturing Economic Impacts

Impact Category	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

Note: Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding. Sources: IMPLAN, 2025; Kimley-Horn, 2026.

9.6.3. Off-Airport UAS Business Impacts

North Dakota is a national leader in UAS activity, supporting a broad range of applications including research and development, flight testing, manufacturing, data collection, and public-sector operations. This activity is supported by a combination of private-sector businesses, public agencies, and research institutions that rely on UAS technology as a core component of their operations. While some UAS-related activity occurs on airport facilities and is captured within the on-airport tenant impacts, a significant portion takes place at off-airport locations throughout the state.

To provide a more complete picture of aviation-related economic activity in North Dakota, this study includes a supplemental evaluation of off-airport UAS business activity. These impacts are presented separately to distinguish UAS operations that are not dependent on airport location but remain closely tied to the state's aviation and aerospace economy.

9.6.3.1. Methodology and Assumptions

The approach to estimating off-airport UAS business impacts focused on identifying UAS-related employment within North Dakota and estimating the associated economic activity using a consistent modeling framework. In coordination with NDAC, the Greater North Dakota Chamber, and the Northern Plains UAS Test Site, the study team developed an inventory of private-sector businesses and public agencies that may use or rely on UAS technology. Comprehensive surveys were distributed to these organizations, and multiple rounds of follow-up outreach were conducted to encourage participation.

Because survey response rates were limited, additional employment data were identified using ESRI's Business Analyst tool by screening applicable UAS- and aviation-related industry classifications. Employment totals derived from survey responses and supplemental data

sources were reviewed to ensure they did not overlap with employment captured in other components of the study, including on-airport tenants or other supplemental analyses.

The final estimate of direct UAS-related employment served as the input to the IMPLAN economic model, which was used to estimate the direct, multiplier, and total economic impacts associated with off-airport UAS business activity. This approach is consistent with the methodology used throughout the 2025 NDAEIS and provides a standalone assessment of UAS-related economic contributions outside the airport environment.

9.6.3.2. Results

As shown in **Table 9-22**, off-airport UAS business activity supported 380 direct jobs statewide, generating approximately \$32.8 million in direct payroll, and \$72.6 million in direct economic output. These direct impacts represent employment and business activity associated with private-sector firms, public agencies, and research organizations that rely on UAS technology at off-airport locations across the state.

When multiplier effects are included reflecting supplier purchases and household spending by UAS-related employees, off-airport UAS business activity supported an additional 232 jobs. In total, this activity supported approximately 612 jobs, generated \$47.1 million in payroll, contributed \$63.1 million in value added, and produced more than \$114.3 million in total economic output statewide. These results highlight the growing contribution of off-airport UAS business activity to North Dakota's aviation and aerospace economy beyond airport property.

Table 9-22. Off-Airport UAS Business Economic Impacts

Impact Category	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

Note: Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding. Sources: IMPLAN, 2025; Kimley-Horn, 2026.

9.6.4. Grand Forks and Minot Air Force Base Impacts

In addition to the 89 public-use civilian airports included in the 2025 NDAEIS, the state is home to two major military installations, Grand Forks Air Force Base (AFB) and Minot AFB. These military airfields provide significant contributions to the state's economy.

It is important to note that the Economic Impact Statements prepared for the Grand Forks and Minot Air Force Bases were conducted separately from the 2025 NDAEIS; therefore, the methodologies and terminology do not exactly align. Differences between 2025 NDAEIS terminology and the AFB Economic Impact Statement terminology, both for economic impact categories and economic impact measures, are summarized in **Table 9-23** and **Table 9-24**, respectively.

Table 9-23. Comparison of Economic Measure Definitions: 2025 NDAEIS and AFB Economic Impact Statements

Economic Measure	2025 NDAEIS Definition	AFB Economic Impact Definition
Jobs	The number of people employed	Same (including civilian and active duty)
Payroll	Total compensation (salaries, wages, benefits)	Same (including civilian and active duty)
Value Added	Contribution to the state economy, comparable to GDP	Not included
Output	Considering the economic impact of an entity, accounts for payroll, other expenses, and value added impacts	Referred to as “expenditures” but not comparable to “output” as it does not include payroll or the value added impacts

Sources: IMPLAN, 2025; Kimley-Horn, 2026.

While **Table 9-23** summarizes differences in how economic measures are defined and reported, differences exist in how economic impact categories are defined and applied between the 2025 NDAEIS and the AFB Economic Impact Statements. These distinctions are summarized in **Table 9-24**.

Table 9-24. Comparison of Economic Impact Category Definitions: 2025 NDAEIS and AFB Economic Impact Statements

Economic Impact Category	2025 NDAEIS Definition	AFB Economic Impact Definition
Direct	Initial effects from airport operations, construction, and visitor spending	AFB statement includes direct jobs and payroll
Indirect	Portions of direct revenues used to purchase goods and services from businesses in North Dakota	Includes “Estimated Indirect Jobs Created” and assumed to include “Estimated Annual Dollar Value of Jobs Created”
Induced	Income earned by workers from direct and supplier sales transactions that are then spent in North Dakota (household spending)	No Reference
Total	The sum of direct, indirect, and induced impacts	Assumed to be the sum of all payroll and all expenditures and referred to as “Total Impacts”

Source: Kimley-Horn, 2026.

Section 9.6.4.3 further describes how these terminology differences were reconciled to develop a total economic impact for each AFB. These reconciled totals were then incorporated into the statewide aviation economic impact presented in **Section 9.8.2** to allow for comparison with the previous 2025 NDAEIS.

9.6.4.1. Grand Forks Air Force Base

Grand Forks AFB is located 16 miles west of Grand Forks in northeastern North Dakota. Over the decades, the mission of the base has evolved from an air defense and nuclear deterrence mission to what it is today—home to the 319th Reconnaissance Wing and a leader in its growing mission set in cyber, space, and air domains⁴. The base is a hub for UAS, utilizing the RQ-4 Global Hawk, which is a high-altitude, long-endurance UAS based at Grand Forks AFB.

Every five years, the 319th Comptroller Squadron updates and publishes an economic impact statement for the AFB. The most recent Economic Impact Statement available is for Fiscal Year (FY) 2023. **Table 9-25** presents a summary of direct and indirect impacts from the *Grand Forks Air Force Base – Fiscal Year 2023 Economic Impact Statement*. Direct impacts include jobs for active duty personnel and civilian/non-active duty personnel (excluding active duty dependents), payroll for military and civilian personnel, and local expenditures. Indirect impact categories include estimated jobs that are created in the community as a result of the AFB and the estimated dollar value of those jobs. As shown, the total economic impact of Grand Forks AFB was nearly \$197.6 million and supported 2,611 jobs (direct and indirect) in 2023.

Table 9-25. Grand Forks AFB Economic Impact Summary

Economic Impact Category	Value
Direct Impacts	
Jobs (active duty + civilian)	2,201
Annual Payroll (active duty + civilian)	\$142,251,734
Local Annual Expenditures	\$35,877,187
Indirect Impacts	
Estimated Indirect Jobs Created	410
Estimated Annual Dollar Value of Jobs Created	\$19,438,100
Average Annual Pay	\$47,410
Total Annual Economic Impact Estimate	
Total Jobs	2,611
Annual Payroll	\$142,251,734
Local Annual Expenditures	\$35,877,187
Estimated Annual Dollar Value of Jobs Created	\$19,438,100
Total Impacts	\$197,577,021

Note: All dollar figures are presented as reported in the Grand Forks Air Force Base – Fiscal Year 2023 Economic Impact Statement. Source: Grand Forks Air Force Base – Fiscal Year 2023 Economic Impact Statement, 2025.

⁴ Grand Forks Air Force Base – Fiscal Year 2023 Economic Impact Statement.

9.6.4.2. Minot Air Force Base

Minot AFB is a major United States Air Force installation that is located 13 miles north of Minot in north central North Dakota. It is the home of the 5th Bomb Wing and 91st Missile Wing. Minot AFB's mission centers on nuclear deterrence and ensuring national security through nuclear-armed bombers and missiles. The 5th Bomb Wing operates the B-52H Stratofortress bombers, and the 91st Missile Wing oversees intercontinental ballistic missiles and manages Minuteman III missile sites.

The Budget Office of the 5th Bomb Wing Comptroller updates and publishes an Economic Impact Analysis annually for the base. The most recent economic impact analysis available is for Fiscal Year (FY) 2024. **Table 9-26** presents a summary of direct and indirect impacts from the *Minot Air Force Base, North Dakota – Economic Impact Analysis, Edition FY23*. Similar to the Grand Forks AFB economic impact study, direct impacts include jobs for active duty personnel and civilian/non-active duty personnel (excluding active duty dependents), payroll for military and civilian personnel, and local expenditures. Indirect impacts include estimated jobs that are created in the community as a result of the AFB and the estimated dollar value of those jobs. The total economic impact of the Minot AFB was over \$651.6 million in 2024. The base also supported 8,494 jobs (direct and indirect combined).

Table 9-26. Minot AFB Economic Impact Summary

Economic Impact Category	Value
Direct Impacts	
Jobs (active duty + civilian)	6,479
Annual Payroll (active duty + civilian)	\$451,993,779
Annual Expenditures	\$80,629,944
Indirect Impacts	
Estimated Indirect Jobs Created	2,015
Estimated Annual Dollar Value of Jobs Created	\$118,985,750
Average Annual Pay	\$59,050
Total Annual Economic Impact Estimate	
Total Jobs	8,494
Annual Payroll	\$451,993,779
Annual Expenditures	\$80,629,944
Estimated Annual Dollar Value of Jobs Created	\$118,985,750
Total Impacts	\$651,609,473

Note: All dollar figures are presented as reported in the Minot Air Force Base, North Dakota – Economic Impact Analysis. Sources: Minot Air Force Base, North Dakota – Economic Impact Analysis: Edition FY23, 2025.

9.6.4.3. Summary of Military Impacts

Table 9-27 provides a summary of jobs, payroll, and expenditures for both Grand Forks and Minot AFBs. As shown, military aviation supports more than 11,100 jobs that have an annual payroll of \$732.7 million, which includes the dollar value of jobs that are created within the local community as a result of the bases. Combined, the bases have annual expenditures of \$116.5 million, which reflect construction, service contracts, and procurement. Both Grand Forks AFB and Minot AFB have a combined total impact of nearly \$850 million annually.

Table 9-27. Grand Forks and Minot AFB Economic Impact Summary

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 Impacts	\$197,567,021	\$651,609,473	\$849,176,494

Note: Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding. Sources: IMPLAN, 2025; Kimley-Horn, 2026.

9.6.5. Economic Impact Loss Due to Aviation Workforce Challenges

Aviation workforce availability is a growing challenge facing the U.S., including North Dakota's aviation system. Airports and aviation-related businesses across the country and within the state report increasing difficulty filling open positions, particularly in skilled maintenance, technical, and specialized aviation occupations. As documented in **Chapter 7. Issues and Industry Advancements**, these unfilled positions disproportionately affect maintenance and technician roles that are essential to safe operations, aircraft availability, and overall system performance.

Because workforce shortages can limit operational capacity and constrain economic activity, this study includes a supplemental analysis to estimate the potential economic impact loss associated with reported aviation workforce challenges. The following subsections summarize the methodology, assumptions, and results of this assessment.

9.6.5.1. Methodology and Assumptions

During site visits with airport managers and through surveys of on-airport tenants and select off-airport organizations, including UND Aerospace and UAS-related entities, respondents were asked to report the number and type of unfilled aviation positions in 2024. No secondary data sources were available to independently support or validate estimates of economic impact loss associated with aviation workforce challenges. It should be noted that response rates were limited (see **Chapter 7. Issues and Industry Advancements**) which suggests the economic impacts presented may understate the true scale of workforce-related constraints. Reported

direct employment associated with unfilled positions was used as the input to the IMPLAN economic model to estimate potential economic impact loss.

9.6.5.2. Results

As presented in **Table 9-28**, unfilled aviation positions reported by airports and aviation-related businesses in 2024 represent an estimated 52 unfilled direct jobs, corresponding to approximately \$3.8 million in direct payroll, \$4.0 million in direct value added, and over \$4.8 million in direct economic output that is not being realized due to workforce constraints.

When multiplier effects are considered reflecting forgone supplier activity and reduced household spending associated with these unfilled positions, the potential economic impact loss increases to an estimated 73 total jobs, \$5.0 million in payroll, \$6.0 million in value added, and approximately \$8.5 million in lost total economic output statewide.

These estimates represent the potential economic activity that could be supported if reported aviation workforce positions were fully filled. Given survey response limitations and the absence of secondary validation data, these results likely understate the full extent of workforce-related economic constraints across North Dakota's aviation system.

Table 9-28. Economic Impact Loss Associated with Unfilled Aviation Positions

Impact 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

Note: Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding. Sources: IMPLAN, 2025; Kimley-Horn, 2026.

9.7. 2025 NDAEIS Total Impacts and Statewide Context

Table 9-29 summarizes the total jobs, payroll, value added, and output impacts associated with the activities presented in **Sections 9.5** and **9.6**, including the core impacts generated by North Dakota's 89 public-use airports and the supplemental off-airport impacts, which make up the broader aerospace industry in the state. In total, North Dakota's aerospace industry supports more than 28,000 jobs and approximately \$1.8 billion in payroll. The industry also contributes an estimated \$1.6 billion in value added to the state's GDP and generates a total economic output of approximately \$3.6 billion. A comparison of these results with those from the 2015 NDAEIS is provided in **Section 9.8**.

Table 9-29. Total Economic Impact of North Dakota's Aviation Industry

Impact Categories	Jobs	Payroll	Value Added	Output
Core Airport Impacts	13,637	\$750,812,000	\$1,077,126,000	\$1,790,885,000
Off-Airport UND Aerospace	756	\$42,608,000	\$59,044,000	\$103,063,000
Off-Airport Aircraft/Aerospace Manufacturing	2,623	\$213,419,000	\$377,529,000	\$731,646,000
Off-Airport UAS Impacts	612	\$47,145,000	\$63,097,000	\$114,304,000
Grand Forks AFB	2,611	\$161,689,834	N/A	\$197,567,021
Minot AFB	8,494	\$570,979,529	N/A	\$651,609,473
Sub-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

Notes: Jobs are rounded to the nearest whole number. Dollar values are rounded to the nearest 1,000. Totals may not sum due to rounding. Value Added impacts were not evaluated in the AFB Economic Impact Statements and are therefore not included in this table. 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, 2025; 2015 NDAEIS; Kimley-Horn, 2026.

Table 9-30 offers the breakdown of direct, multiplier, and total jobs supported by the aerospace industry in North Dakota. As shown, direct employment accounts for the majority of aerospace-supported jobs in the state, representing 72 percent of total employment, or 20,826 jobs. The remaining 7,908 jobs (28 percent) are attributable to multiplier effects, including indirect impacts generated through supplier purchases (indirect impacts) and induced impacts resulting from employee household spending.

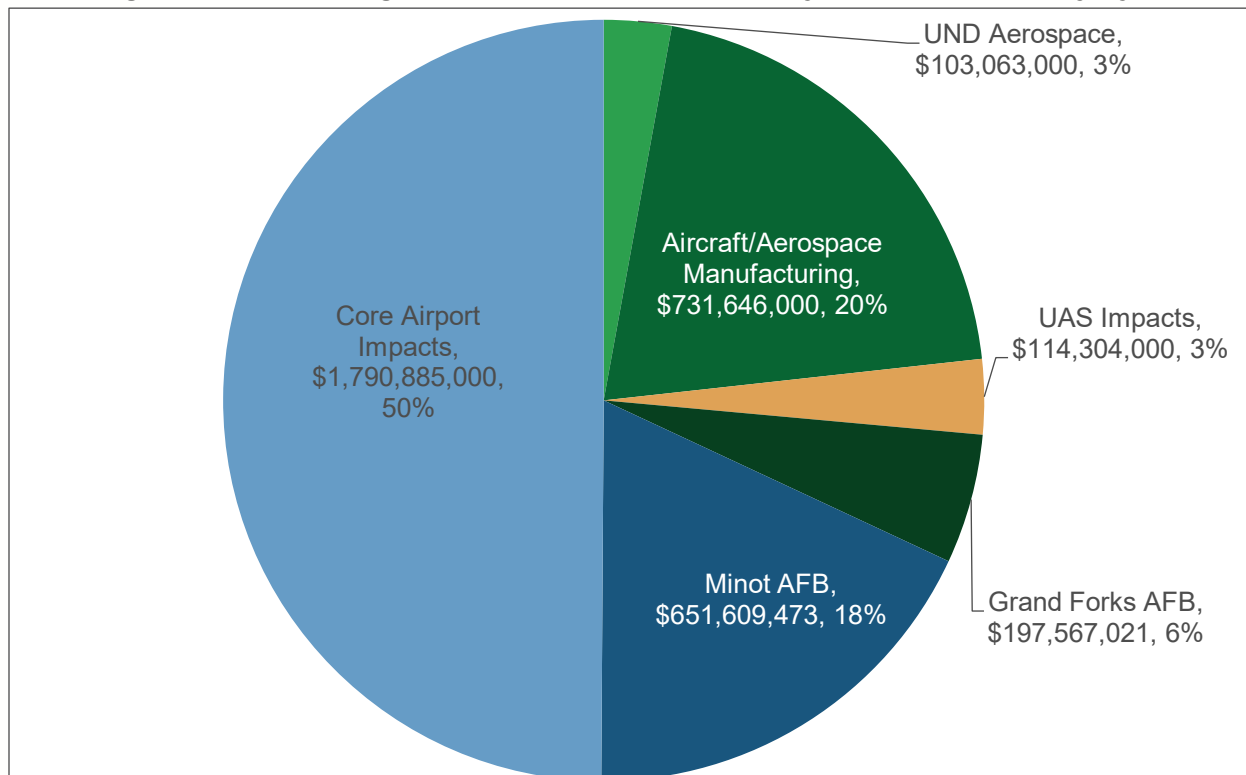
Table 9-30. Distribution of Aerospace Industry Jobs in North Dakota

Impact Type	Jobs	% of Total
Direct	20,826	72%
Multiplier	7,908	28%
Total	28,734	N/A

Sources: IMPLAN, 2025; Kimely-Horn, 2026.

Figure 9-4 illustrates the distribution of the aerospace industry's \$3.59 billion in total economic output across activity types. As shown, the core airport impacts account for 50 percent of the industry's total economic impact, demonstrating the importance of North Dakota's public-use airports to the state's aerospace economy. Off-airport aircraft and aerospace manufacturing activities represent approximately 20 percent of total impacts, followed closely by Minot AFB, at 18 percent. Grand Forks AFB contributes six percent of total impacts, while the UND School of Aerospace Sciences and off-airport UAS impacts each account for approximately three percent.

Figure 9-4. Percentage of Total Economic Output by Aerospace Activity Type



Note: Totals were rounded to the nearest thousand and may not sum. Sources: IMPLAN, 2025; Kimley-Horn, 2026.

Table 9-31 shows a similar share of impacts across activity types for total jobs and payroll, further illustrating that core airport impacts are the primary driver of North Dakota's aerospace industry. These impacts are followed by those generated by Minot Air Force Base and off-airport aircraft and aerospace manufacturing activities. Differences in rank between an activity type's share of total jobs and its share of total payroll reflect variations in average wages across the industry. In some cases, activity types support a larger share of employment but account for a smaller share of payroll, indicating comparatively lower average wages, while the opposite is true for higher-wage segments of the aerospace industry.

Table 9-31. Percentage of Total Jobs and Payroll by Aerospace Activity Type

Activity Type	% of Total Jobs	% of Total Payroll
Core Airport Impacts	47%	42%
Minot AFB	30%	32%
Off-Airport Aircraft/Aerospace Manufacturing	9%	12%
Grand Forks AFB	9%	9%
Off-Airport UAS Impacts	2%	3%
Off-Airport UND Aerospace	3%	2%

Sources: IMPLAN, 2025; Kimley-Horn, 2026.

Table 9-32 summarizes North Dakota’s total aerospace-related economic impacts for jobs, payroll, value added, and output within the broader context of the state economy. As shown, the aerospace industry supports more than two percent of North Dakota’s total output and approximately five percent of all jobs statewide. The industry also accounts for about four percent of statewide payroll, and more than two percent of total value added, reflecting its significant contribution to North Dakota’s GDP. It should be noted that value added impacts for Minot AFB and Grand Forks AFB were not reported in the respective Economic Impact Statements for those installations and, therefore, are not included in the results presented in **Table 9-32**.

Table 9-32. North Dakota's Aerospace Industry's Contributions to the State Economy

Measure	State Economy	Total Aerospace Industry Impacts	Percent of Economy Supported by Aviation
Jobs	597,016	28,734	4.8%
Payroll	\$44,330,532,000	\$1,786,653,000	4.0%
Value Added	\$76,866,186,000	\$1,576,796,000	2.1%
Output	\$141,330,684,000	\$3,589,074,000	2.5%

Note: Jobs were rounded to the nearest whole number. Dollar values were rounded to the nearest thousand. Sources: IMPLAN, 2025; Kimley-Horn, 2026.

9.8. Study Comparison (2015 to 2025)

This section summarizes key differences between the 2015 and 2025 North Dakota Aviation Economic Impact Studies and provides context for interpreting changes in reported economic impacts over time. While both studies were conducted using industry-standard methodologies, differences in economic conditions, aviation activity, data availability, and modeling inputs affect the comparability of results. As a result, comparisons between the two studies should be interpreted at a high level and viewed as indicators of overall trends rather than precise point-to-point measures of growth or decline.

9.8.1. Core Airport Impact Comparison

Between 2015 and 2025, aviation activity at North Dakota’s public-use airports continued to support substantial economic contributions across the state. As shown in **Table 9-33**, total core airport impacts, including airport administration, on-airport businesses, capital spending, and visitor expenditures, grew across all reported measures.

In 2025, core airport activity supported 13,637 jobs, an increase of approximately 12 percent compared to the 12,217 jobs reported in the 2015 study. Total payroll associated with core airport impacts increased from approximately \$505.2 million in 2015 to \$750.8 million in 2025, representing a 49 percent increase over the ten-year period. Total economic output increased from approximately \$1.6 billion to \$1.8 billion, a growth of 14 percent.

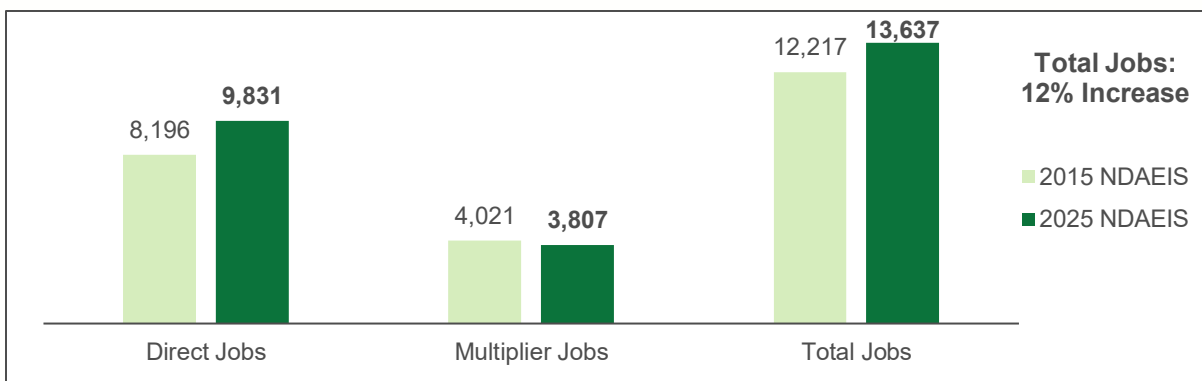
Table 9-33. Core Airport Impacts

Year	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%	N/A	14%

Note: Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding. Sources: IMPLAN, 2025; Kimley-Horn, 2026.

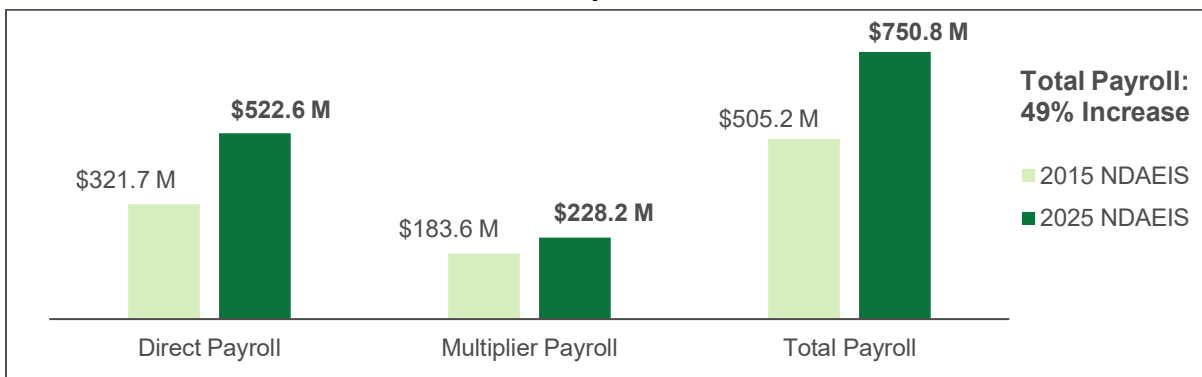
Figure 9-5 through **Figure 9-7** provide a more detailed overview of the comparison between direct, multiplier, and total impacts for the core airport jobs, payroll, and output between the 2015 and 2025 NDAEIS. Value added is excluded as it was not evaluated in the 2015 NDAEIS.

Figure 9-5. Comparison of Direct, Multiplier, and Total Job Impacts for Core Airport Impacts



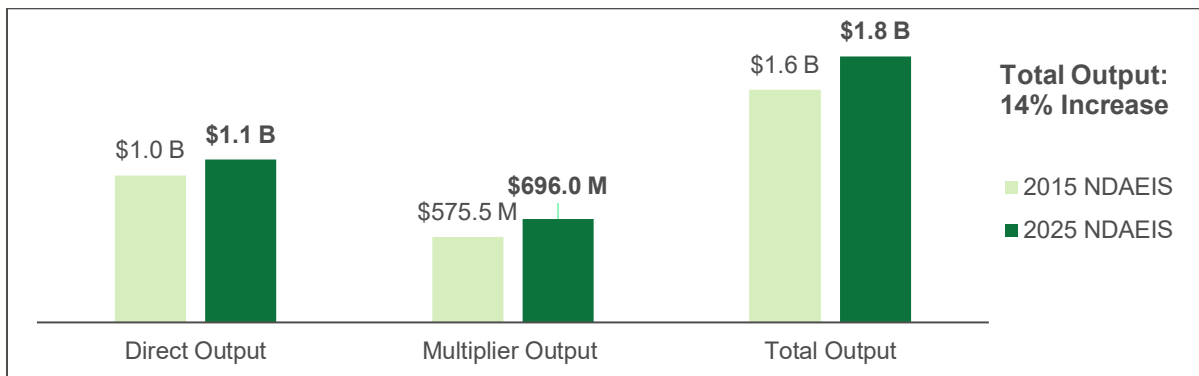
Sources: 2015 NDAEIS: Kimley-Horn, 2025.

Figure 9-6. Comparison of Direct, Multiplier, and Total Payroll Impacts for Core Airport Impacts



Sources: 2015 NDAEIS: Kimley-Horn, 2025.

Figure 9-7. Comparison of Direct, Multiplier, and Total Output Impacts for Core Airport Impacts



Sources: 2015 NDAEIS: Kimley-Horn, 2025.

See **Table 9-40** in **Section 9.11. Additional Tables** for an airport-by-airport comparison of 2025 and 2015 core airport impact results.

9.8.2. Core Airport and Supplemental Impact Comparison

To provide a more complete assessment of aviation's economic footprint and changes from 2015, it is important to compare the results of the core impacts alongside the supplemental impacts assessed in both the 2015 and 2025 NDAEIS studies. It is important to note that while the scope of work is largely comparable between the two studies, there were some differences in the supplemental impacts that were assessed. **Table 9-34** provides a list of the supplemental impacts assessed in 2025 and clarifies if those same supplemental impacts were assessed in 2015. The 2015 NDAEIS included an assessment of off-airport aerial applicator impacts, which was not assessed in 2025.⁵

Table 9-34. Differences in Supplemental Impacts Assessed (2015 and 2025 NDAEIS)

Supplemental Impacts in 2025 NDAEIS	Included in 2015 NDAEIS (Yes/No)
Minot and Grand Forks AFB	Yes
Off-Airport Aviation/Aerospace Manufacturing	Yes
Off-Airport UND Aerospace	Yes*
UAS Businesses	No (Qualitative assessment only)

Note: * Employment associated with UND Aerospace's off-airport activity was included in the Aviation and Aerospace Companies assessment performed in the 2015 NDAEIS. Sources: 2015 NDAEIS, Kimley-Horn, 2015.

⁵ The 2015 NDAEIS assessed impacts associated with improved job efficiency from aviation use and included those results in the study's total impacts. However, these impacts represented existing jobs, payroll, and output that benefit from aviation through increased efficiency (e.g., reduced travel time, improved connectivity, and enhanced supply chain performance), rather than new economic activity generated by aviation. Consistent with this distinction, the values shown in Table 9-28 exclude these efficiency-related impacts and instead focus solely on jobs, payroll, and output directly attributable to aviation activity, ensuring a consistent comparison between 2015 and 2025 results.

Table 9-35 compares the supplemental and core impacts of the 2015 and 2025 NDAEIS studies. Due to the differences outlined in **Table 9-34**, the supplemental impacts are not directly comparable across all categories, whereas the core airport impacts are considered directly comparable.

Despite these differences in supplemental activities, the supplement activity impacts from the 2025 NDAEIS indicate modest growth in employment and substantial increases in payroll and output. When combined with core airport impacts, the results demonstrate overall growth in the economic impact of North Dakota's aviation sector since 2015.

In 2025, North Dakota's aviation industry supported more than 28,000 jobs, an increase of approximately eight percent compared to the jobs reported in the 2015 NDAEIS. Total payroll associated with the industry increased from approximately \$1.17 billion in 2015 to \$1.79 billion in 2025, representing a 53 percent increase over the ten-year period. Total economic output increased from approximately \$2.8 billion to \$3.6 billion, a growth of 28 percent.



Table 9-35. Core Airport and Supplemental Impacts

Impact Categories	2025	2015	% Change	2025	2015	% Change	2025	2015	% Change
	Jobs			Payroll			Output		
Off-Airport UND Aerospace	756	N/A	N/A	\$42,608,000	N/A	N/A	\$103,063,000	N/A	N/A
Off-Airport Aircraft/Aerospace	2,623	4,479	-41%	\$213,419,000	\$227,100,000	-6%	\$731,646,000	\$497,000,000	47%
Off-Airport UAS Impacts	612	N/A	N/A	\$47,145,000	N/A	N/A	\$114,304,000	N/A	N/A
Off-Airport Aerial Applicators	N/A	156	N/A	N/A	\$5,600,000	N/A	N/A	\$15,600,000	N/A
Grand Forks AFB	2,611	2,565	2%	\$161,689,834	\$105,200,000	54%	\$197,567,021	\$203,700,000	-3%
Minot AFB	8,494	7,283	17%	\$570,979,529	\$321,000,000	78%	\$651,609,473	\$513,500,000	27%
Sub-Total of Supplemental Impacts	15,097	14,483	4%	\$1,035,841,000	\$658,900,000	57%	\$1,798,189,000	\$1,229,800,000	46%
Core Airport Impacts	13,637	12,217	12%	\$750,812,000	\$505,247,509	49%	\$1,790,885,000	\$1,564,352,371	14%
Sum of All Impacts	28,734	26,700	8%	\$1,786,653,000	\$1,164,147,509	53%	\$3,589,074,000	\$2,794,152,371	28%

Note: Core impacts from 2015 NDAEIS and Grand Forks and Minot AFB dollar values were kept unchanged from the documents they were sourced from. Excluding results for the core impacts of the 2015 NDAEIS, Grand Forks and Minot AFB, dollar values rounded to the nearest 1,000. Totals may not sum due to rounding. 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, 2025; 2015 NDAEIS; Kimley-Horn, 2026.

9.9. Tax Revenue Analysis

Public tax revenues are generated at the federal, state, and local levels as a result of aviation-related economic activity across North Dakota. These impacts are associated with taxes paid by airport administration, on-airport business tenants, construction and development activity related to capital improvements, and out-of-state visitors traveling to the state by air. Taxes considered in this analysis include social insurance taxes, personal income taxes, sales taxes, property taxes, and other taxes and fees. These taxes are defined in **Table 9-36**.

Table 9-36. Tax Categories

Tax	Definition
Social Insurance	Includes employee and employer contributions to Social Security, Medicare, and federal unemployment insurance. Represents revenue for these programs collected at the federal level only.
Personal Income	Represents income taxes paid at the federal and state levels.
Sales	Represents estimated tax revenue generated from taxable purchases of goods and applicable services at the state and local level.
Property	Represents property taxes paid to county, city, township, and special district governments (such as school or fire districts), estimated based on observed regional property tax collections.
Other Taxes/Fees	Represents a mix of federal, state, and local taxes and fees, including selective consumption taxes such as motor fuel, alcohol, and tobacco taxes; import tariffs; corporate profits taxes; motor vehicle license, registration, title, and renewal fees; fishing and hunting licenses; business property taxes on commercial land, equipment, and facilities; severance taxes on oil, gas, and other natural resource extraction; and other similar levies. These taxes are classified primarily as Taxes on Production and Imports (TOPI) and are treated as a cost of production, derived from value added rather than labor income.

Sources: IMPLAN, 2025; Kimley-Horn, 2026.

9.9.1. Methodology and Assumptions

IMPLAN's Tax Module estimates government revenues generated by economic activity such as jobs, payroll (also referred to as wages), business output, and household spending. Rather than applying statutory tax rates specified in law, IMPLAN uses effective tax rates derived from actual historical tax collections within a region. These effective rates reflect what households and businesses actually pay after accounting for deductions, exemptions, credits, income distribution, and non-payers, producing more realistic and defensible tax estimates.

IMPLAN works backward from observed tax collections, estimating typical tax relationships such as the amount of tax paid per dollar of wages, business output, or household spending. These average relationships are applied to the direct economic output estimated for each aviation activity category (airport administration, on-airport business tenants, capital improvement expenses, and visitor spending). This approach avoids overstating tax impacts and ensures alignment with observed public revenue trends.

9.9.2. Results

In total, aviation activity in North Dakota generated approximately \$276.2 million in tax revenue in 2024. Of this total, approximately \$228.1 million was generated at the federal level, \$41.2 million accrued to the state, and \$6.9 million supported by local governments.

On-airport business tenants were the largest contributors to aviation-related tax revenues, generating approximately \$185.0 million, or about 67 percent of total tax impacts statewide. Airport capital expenditures generated approximately \$18.5 million in tax revenue, while airport administrative activity contributed approximately \$11.5 million.

Visitor spending also accounted for a significant share of tax generation across North Dakota. Commercial service visitors generated approximately \$46.9 million in tax revenues, while GA visitor spending contributed an additional \$14.3 million, reflecting the role of air travelers in supporting public revenues through off-airport economic activity. **Table 9-37** summarizes IMPLAN-estimated tax revenues by activity category and level of government.

Table 9-37. IMPLAN Estimated Tax Revenues Generated from Aviation Activity

Tax Source	Federal	State	Local	Total
Airport Administration	\$9,895,000	\$1,440,000	\$203,000	\$11,538,000
Capital Expenditures	\$14,873,000	\$3,166,000	\$502,000	\$18,542,000
Business Tenants	\$165,977,000	\$16,695,000	\$2,294,000	\$184,966,000
Commercial Service Visitors	\$28,598,000	\$15,246,000	\$3,023,000	\$46,867,000
GA Visitors	\$8,727,000	\$4,652,000	\$922,000	\$14,302,000
Total	\$228,071,000	\$41,199,000	\$6,944,000	\$276,213,000

Note: Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding. Sources: IMPLAN, 2025; Kimley-Horn, 2026.

Certain aviation-specific taxes are not explicitly modeled within IMPLAN, including North Dakota's aviation fuel tax, aircraft excise tax, and airline property tax. While some aviation-related taxes may be implicitly embedded within aggregated tax categories, IMPLAN does not allow these revenues to be isolated or directly attributed to aviation activity. As a result, these taxes are treated as outside the scope of IMPLAN's tax impact estimates and are added separately using primary data. The taxes estimated through IMPLAN and those that are

presented in **Table 9-38** are not additive in that summing these figures may result in double-counting aviation-specific tax revenues.

In 2024, aviation-specific taxes generated an additional \$5.4 million in revenue statewide. This total includes approximately \$3.0 million from aircraft excise taxes, \$2.2 million from aviation fuel taxes, and \$0.2 million from airline property taxes. These revenues provide direct support for aviation-related programs and infrastructure investment within the state.

Table 9-38. Additional Tax Revenues Generated from Aviation Activity

Tax Source	Revenue
Aviation Fuel	\$2,161,769
Airline Property	\$228,408
Aircraft Excise	\$3,041,734
Total	\$5,431,911

Note: Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding. Source: NDAC, 2025.

Together, the IMPLAN-estimated tax impacts and additional aviation-specific tax revenues demonstrate that aviation activity in North Dakota not only supports jobs and economic output but also generates meaningful public revenues that benefit federal, state, and local governments and help fund essential public services and infrastructure.

See **Table 9-41** in **Section 9.11. Additional Tables** for an airport-by-airport overview of the tax revenues generated from aviation activity.

9.10. Conclusion

Aviation plays a critical role in supporting North Dakota's economy, communities, and quality of life. By enabling the movement of people and goods, providing essential services, and supporting business and industry, the state's aviation system serves as a key economic engine that extends well beyond airport boundaries. The 2025 NDAEIS was conducted to quantify these contributions and provide decision-makers with a clear, data-driven understanding of aviation's economic importance.

The findings presented in this report demonstrate that aviation activity at North Dakota's public-use airports supports substantial employment, payroll, value added, and economic output statewide. Core airport impacts, including airport administration, on-airport business tenants, capital investment, and visitor spending, reflect the direct, day-to-day economic activity generated through airport operations. As presented in **Chapter 9**, these impacts alone represent a significant share of statewide economic activity and underscore the importance of maintaining a safe, efficient, and well-functioning airport system.

Beyond core airport activity, the 2025 NDAEIS also captures aviation-related economic activity that occurs off airport property but remains closely tied to the aviation system. Supplemental analyses of aviation education, aircraft and aerospace manufacturing, UAS businesses, and military aviation illustrate aviation's reach across a diverse range of industries and institutions. Comparisons between the 2015 and 2025 NDAEIS results indicate that aviation's role in the state economy has grown over the past decade, with increases observed in employment, payroll, and total economic output, reinforcing aviation's continued importance to North Dakota's economic vitality.

The 2025 NDAEIS also identifies challenges that may affect the future performance of the aviation system, particularly workforce availability constraints. Unfilled aviation positions represent potential economic activity that is not fully realized, highlighting the importance of workforce development and training initiatives. Taken together, the 2025 NDAEIS demonstrates that aviation is not only a transportation asset but also a foundational component of North Dakota's economy. When used alongside the NDSASP, the 2025 NDAEIS findings provide a comprehensive framework to inform future investment, policy, and planning decisions and support the state's long-term economic competitiveness.

9.11. Additional Tables

Table 9-39. Direct, Multiplier, and Total Economic Impacts by Airport

Airport			Direct				Multiplier				Total			
Associated City	Airport Name	FAA ID	Jobs	Payroll	Value Added	Output	Jobs	Payroll	Value Added	Output	Jobs	Payroll	Value Added	Output
Commercial Service														
Bismarck	Bismarck Municipal Airport	BIS	1,491	\$76,542,000	\$109,272,000	\$171,350,000	616	\$36,903,000	\$59,677,000	\$112,972,000	2,107	\$113,445,000	\$168,949,000	\$284,322,000
Devils Lake	Devils Lake Regional Airport	DVL	136	\$7,124,000	\$9,721,000	\$15,883,000	56	\$3,418,000	\$5,608,000	\$10,477,000	192	\$10,542,000	\$15,329,000	\$26,360,000
Dickinson	Dickinson – Theodore Roosevelt Regional Airport	DIK	321	\$21,679,000	\$27,995,000	\$42,333,000	149	\$9,030,000	\$14,667,000	\$27,430,000	470	\$30,709,000	\$42,661,000	\$69,764,000
Fargo	Hector International Airport	FAR	4,123	\$217,509,000	\$274,128,000	\$404,199,000	1,446	\$85,957,000	\$138,977,000	\$260,849,000	5,569	\$303,467,000	\$413,105,000	\$665,048,000
Grand Forks	Grand Forks International Airport	GFK	1,266	\$72,740,000	\$104,941,000	\$171,724,000	525	\$31,975,000	\$51,824,000	\$98,137,000	1,791	\$104,715,000	\$156,765,000	\$269,861,000
Jamestown	Jamestown Regional Airport	JMS	163	\$9,815,000	\$13,386,000	\$24,881,000	78	\$4,730,000	\$7,682,000	\$14,282,000	241	\$14,544,000	\$21,068,000	\$39,164,000
Minot	Minot International Airport	MOT	909	\$43,764,000	\$62,501,000	\$101,762,000	379	\$22,561,000	\$36,370,000	\$69,209,000	1,288	\$66,325,000	\$98,871,000	\$170,971,000
Williston	Williston Basin International Airport	XWA	773	\$37,258,000	\$59,028,000	\$90,749,000	326	\$19,187,000	\$30,879,000	\$58,988,000	1,099	\$56,446,000	\$89,907,000	\$149,737,000
General Aviation														
Arthur	Arthur Airport	1A2	<1	\$3,000	\$8,000	\$13,000	<1	\$3,000	\$4,000	\$8,000	<1	\$6,000	\$12,000	\$21,000
Ashley	Ashley Municipal Airport	ASY	12	\$555,000	\$699,000	\$1,225,000	4	\$227,000	\$383,000	\$700,000	15	\$782,000	\$1,082,000	\$1,926,000
Beach	Beach Airport	20U	6	\$342,000	\$518,000	\$906,000	3	\$163,000	\$278,000	\$513,000	8	\$505,000	\$796,000	\$1,419,000
Beulah	Beulah Municipal Airport	95D	8	\$328,000	\$360,000	\$473,000	2	\$98,000	\$159,000	\$286,000	10	\$426,000	\$519,000	\$759,000
Bottineau	Bottineau Municipal Airport	D09	9	\$500,000	\$661,000	\$1,069,000	3	\$212,000	\$350,000	\$644,000	13	\$713,000	\$1,011,000	\$1,712,000
Bowbells	Bowbells Municipal Airport	5B4	<1	\$6,000	\$13,000	\$23,000	<1	\$5,000	\$7,000	\$14,000	<1	\$11,000	\$20,000	\$37,000
Bowman	Bowman Regional Airport	BWW	18	\$1,509,000	\$1,679,000	\$2,120,000	8	\$495,000	\$798,000	\$1,443,000	27	\$2,004,000	\$2,478,000	\$3,563,000
Cando	Cando Municipal Airport	9D7	10	\$490,000	\$552,000	\$802,000	3	\$157,000	\$260,000	\$470,000	12	\$647,000	\$812,000	\$1,272,000
Carrington	Carrington Municipal Airport	46D	6	\$237,000	\$344,000	\$650,000	2	\$123,000	\$206,000	\$383,000	8	\$360,000	\$550,000	\$1,033,000
Casselton	Casselton Robert Miller Regional Airport	5N8	37	\$1,858,000	\$2,030,000	\$2,742,000	10	\$623,000	\$1,008,000	\$1,825,000	48	\$2,482,000	\$3,038,000	\$4,567,000
Cavalier	Cavalier Municipal Airport	2C8	9	\$535,000	\$640,000	\$924,000	3	\$181,000	\$303,000	\$544,000	11	\$716,000	\$943,000	\$1,467,000

Airport			Direct				Multiplier				Total			
Associated City	Airport Name	FAA ID	Jobs	Payroll	Value Added	Output	Jobs	Payroll	Value Added	Output	Jobs	Payroll	Value Added	Output
Columbus	Columbus Municipal Airport	D49	2	\$4,000	\$6,000	\$10,000	<1	\$2,000	\$3,000	\$6,000	2	\$6,000	\$9,000	\$16,000
Cooperstown	Cooperstown Municipal Airport	S32	6	\$300,000	\$359,000	\$467,000	2	\$98,000	\$159,000	\$286,000	8	\$398,000	\$518,000	\$754,000
Crosby	Crosby Municipal Airport	D50	6	\$535,000	\$848,000	\$1,361,000	4	\$243,000	\$416,000	\$766,000	10	\$779,000	\$1,264,000	\$2,127,000
Drayton	Drayton Municipal Airport	D29	1	\$62,000	\$83,000	\$132,000	<1	\$25,000	\$42,000	\$77,000	1	\$87,000	\$126,000	\$209,000
Dunseith	International Peace Garden Airport	S28	7	\$311,000	\$423,000	\$962,000	3	\$170,000	\$292,000	\$537,000	10	\$481,000	\$715,000	\$1,499,000
Edgeley	Edgeley Municipal Airport	51D	3	\$126,000	\$180,000	\$302,000	1	\$58,000	\$97,000	\$178,000	3	\$184,000	\$277,000	\$480,000
Elgin	Elgin Municipal Airport	Y71	<1	\$2,000	\$6,000	\$10,000	<1	\$2,000	\$3,000	\$6,000	<1	\$4,000	\$10,000	\$17,000
Ellendale	Ellendale Municipal Airport	4E7	4	\$121,000	\$181,000	\$341,000	1	\$65,000	\$108,000	\$201,000	5	\$186,000	\$289,000	\$542,000
Enderlin	Sky Haven Airport	5N4	1	\$46,000	\$83,000	\$141,000	<1	\$28,000	\$45,000	\$85,000	1	\$74,000	\$128,000	\$226,000
Fessenden	Fessenden-Streibel Municipal Airport	D24	<1	\$6,000	\$13,000	\$22,000	<1	\$4,000	\$7,000	\$13,000	<1	\$10,000	\$20,000	\$35,000
Fort Yates	Standing Rock Airport	Y27	3	\$162,000	\$221,000	\$402,000	1	\$74,000	\$125,000	\$230,000	4	\$235,000	\$346,000	\$632,000
Gackle	Gackle Municipal Airport	9G9	<1	\$1,000	\$2,000	\$3,000	<1	\$1,000	\$1,000	\$2,000	<1	\$1,000	\$3,000	\$5,000
Garrison	Garrison Municipal Airport	D05	4	\$219,000	\$319,000	\$556,000	2	\$104,000	\$174,000	\$322,000	6	\$323,000	\$494,000	\$878,000
Glen Ullin	Glen Ullin Regional Airport	D57	4	\$224,000	\$346,000	\$651,000	2	\$117,000	\$200,000	\$369,000	6	\$342,000	\$546,000	\$1,021,000
Grafton	Hutson Field	GAF	11	\$549,000	\$801,000	\$1,407,000	4	\$264,000	\$446,000	\$816,000	15	\$813,000	\$1,247,000	\$2,222,000
Gwinner	Gwinner-Roger Melroe Field	GWR	6	\$298,000	\$443,000	\$734,000	2	\$143,000	\$235,000	\$437,000	9	\$441,000	\$678,000	\$1,171,000
Harvey	Harvey Municipal Airport	5H4	5	\$216,000	\$295,000	\$420,000	1	\$87,000	\$142,000	\$258,000	7	\$304,000	\$438,000	\$677,000
Hazleton	Hazleton Municipal Airport	6H8	1	\$33,000	\$54,000	\$99,000	<1	\$18,000	\$31,000	\$57,000	1	\$51,000	\$84,000	\$156,000
Hazen	Mercer County Regional Airport	HZE	10	\$462,000	\$650,000	\$1,152,000	3	\$218,000	\$367,000	\$675,000	14	\$680,000	\$1,017,000	\$1,826,000
Hettinger	Hettinger – JB Lindquist Regional Airport	HEI	10	\$935,000	\$1,064,000	\$1,379,000	5	\$315,000	\$510,000	\$923,000	15	\$1,249,000	\$1,574,000	\$2,303,000
Hillsboro	Hillsboro Municipal Airport	3H4	20	\$1,224,000	\$1,614,000	\$2,505,000	8	\$504,000	\$831,000	\$1,525,000	28	\$1,728,000	\$2,445,000	\$4,030,000
Kenmare	Kenmare Municipal Airport	7K5	21	\$1,292,000	\$1,535,000	\$2,242,000	8	\$456,000	\$746,000	\$1,360,000	29	\$1,748,000	\$2,280,000	\$3,602,000
Killdeer	Dunn County - Weydahl Field	9Y1	6	\$354,000	\$551,000	\$932,000	3	\$173,000	\$294,000	\$538,000	9	\$527,000	\$844,000	\$1,470,000

Airport			Direct				Multiplier				Total			
Associated City	Airport Name	FAA ID	Jobs	Payroll	Value Added	Output	Jobs	Payroll	Value Added	Output	Jobs	Payroll	Value Added	Output
Kindred	Robert Odegard Field	K74	9	\$621,000	\$753,000	\$1,069,000	4	\$235,000	\$385,000	\$697,000	13	\$856,000	\$1,138,000	\$1,766,000
Kulm	Kulm Municipal Airport	D03	2	\$18,000	\$35,000	\$60,000	<1	\$12,000	\$20,000	\$37,000	2	\$30,000	\$55,000	\$96,000
LaMoure	LaMoure Rott Municipal Airport	4F9	5	\$224,000	\$254,000	\$358,000	1	\$73,000	\$120,000	\$215,000	6	\$296,000	\$374,000	\$573,000
Lakota	Lakota Municipal Airport	5L0	7	\$191,000	\$333,000	\$610,000	2	\$114,000	\$192,000	\$355,000	8	\$305,000	\$525,000	\$966,000
Langdon	Robertson Field	D55	7	\$356,000	\$445,000	\$566,000	2	\$120,000	\$196,000	\$350,000	9	\$476,000	\$640,000	\$916,000
Larimore	Larimore Municipal Airport	2L1	14	\$787,000	\$846,000	\$1,058,000	4	\$223,000	\$363,000	\$647,000	18	\$1,010,000	\$1,209,000	\$1,706,000
Leeds	Leeds Municipal Airport	D31	2	\$93,000	\$149,000	\$319,000	1	\$59,000	\$100,000	\$183,000	3	\$151,000	\$249,000	\$502,000
Lidgerwood	Lidgerwood Municipal Airport	4N4	<1	\$1,000	\$5,000	\$7,000	<1	\$2,000	\$3,000	\$5,000	<1	\$3,000	\$7,000	\$12,000
Linton	Linton Municipal Airport	7L2	7	\$380,000	\$528,000	\$857,000	3	\$165,000	\$275,000	\$504,000	10	\$545,000	\$803,000	\$1,361,000
Lisbon	Lisbon Municipal Airport	6L3	10	\$547,000	\$651,000	\$963,000	3	\$196,000	\$323,000	\$582,000	14	\$743,000	\$974,000	\$1,545,000
Maddock	Maddock Municipal Airport	6D3	5	\$248,000	\$280,000	\$388,000	1	\$83,000	\$137,000	\$249,000	6	\$331,000	\$418,000	\$637,000
Mandan	Mandan Regional - Lawler Field	Y19	34	\$2,117,000	\$2,638,000	\$3,997,000	14	\$858,000	\$1,387,000	\$2,547,000	48	\$2,974,000	\$4,025,000	\$6,544,000
Mayville	Mayville Municipal Airport	D56	9	\$516,000	\$593,000	\$879,000	3	\$176,000	\$288,000	\$522,000	12	\$692,000	\$881,000	\$1,401,000
McClusky	McClusky Municipal Airport	7G2	<1	\$3,000	\$7,000	\$12,000	<1	\$2,000	\$4,000	\$7,000	<1	\$5,000	\$11,000	\$19,000
McVille	McVille Municipal Airport	8M6	2	\$6,000	\$9,000	\$15,000	<1	\$3,000	\$5,000	\$10,000	2	\$10,000	\$15,000	\$25,000
Milnor	Milnor Municipal Airport	4R6	<1	\$25,000	\$44,000	\$76,000	<1	\$14,000	\$24,000	\$44,000	1	\$40,000	\$68,000	\$120,000
Minto	Minto Municipal Airport	D06	2	\$72,000	\$87,000	\$111,000	<1	\$24,000	\$39,000	\$70,000	3	\$96,000	\$126,000	\$181,000
Mohall	Mohall Municipal Airport	HBC	12	\$639,000	\$744,000	\$1,069,000	4	\$214,000	\$352,000	\$636,000	16	\$853,000	\$1,096,000	\$1,705,000
Mott	Mott Municipal Airport	3P3	4	\$224,000	\$307,000	\$496,000	1	\$94,000	\$157,000	\$287,000	5	\$318,000	\$464,000	\$783,000
Napoleon	Napoleon Municipal Airport	5B5	6	\$146,000	\$164,000	\$236,000	1	\$47,000	\$77,000	\$139,000	6	\$193,000	\$241,000	\$374,000
New Rockford	Tomlinson Field	8J7	7	\$237,000	\$308,000	\$650,000	2	\$117,000	\$200,000	\$367,000	8	\$355,000	\$508,000	\$1,018,000
New Town	New Town Municipal Airport	05D	5	\$247,000	\$434,000	\$824,000	2	\$155,000	\$259,000	\$481,000	8	\$401,000	\$693,000	\$1,304,000
Northwood	Northwood Municipal – Vince Field	4V4	10	\$466,000	\$623,000	\$979,000	3	\$190,000	\$315,000	\$578,000	13	\$656,000	\$938,000	\$1,556,000
Oakes	Oakes Municipal Airport	2D5	5	\$280,000	\$324,000	\$463,000	2	\$92,000	\$152,000	\$274,000	7	\$372,000	\$476,000	\$738,000

Airport			Direct				Multiplier				Total			
Associated City	Airport Name	FAA ID	Jobs	Payroll	Value Added	Output	Jobs	Payroll	Value Added	Output	Jobs	Payroll	Value Added	Output
Page	Page Regional Airport	64G	11	\$615,000	\$626,000	\$734,000	3	\$190,000	\$302,000	\$540,000	14	\$805,000	\$928,000	\$1,274,000
Park River	Park River - W C Skjerven Field	Y37	8	\$474,000	\$595,000	\$945,000	3	\$178,000	\$298,000	\$545,000	11	\$653,000	\$893,000	\$1,490,000
Parshall	Parshall-Hankins Airport	Y74	6	\$190,000	\$273,000	\$520,000	2	\$97,000	\$162,000	\$301,000	7	\$287,000	\$435,000	\$821,000
Pembina	Pembina Municipal Airport	PMB	8	\$475,000	\$549,000	\$763,000	3	\$167,000	\$271,000	\$492,000	10	\$642,000	\$820,000	\$1,255,000
Plaza	Trulson Field	Y99	<1	\$1,000	\$3,000	\$5,000	<1	\$1,000	\$2,000	\$3,000	<1	\$2,000	\$5,000	\$8,000
Richardton	Richardton Municipal Airport	4E8	<1	\$2,000	\$5,000	\$8,000	<1	\$2,000	\$3,000	\$5,000	<1	\$3,000	\$7,000	\$12,000
Riverdale	Garrison Dam Recreational Airpark	37N	1	\$7,000	\$12,000	\$20,000	<1	\$4,000	\$7,000	\$13,000	1	\$11,000	\$18,000	\$32,000
Rolette	Rolette Airport	2H9	<1	\$18,000	\$37,000	\$73,000	<1	\$14,000	\$24,000	\$44,000	1	\$33,000	\$61,000	\$117,000
Rolla	Rolla Municipal Airport	06D	15	\$775,000	\$878,000	\$1,196,000	4	\$240,000	\$395,000	\$712,000	19	\$1,015,000	\$1,273,000	\$1,908,000
Rugby	Rugby Municipal Airport	RUG	11	\$679,000	\$788,000	\$1,164,000	4	\$230,000	\$379,000	\$687,000	15	\$908,000	\$1,167,000	\$1,851,000
St. Thomas	St. Thomas Municipal Airport	4S5	3	\$157,000	\$177,000	\$242,000	1	\$48,000	\$79,000	\$142,000	3	\$205,000	\$256,000	\$384,000
Stanley	Stanley Municipal Airport	08D	14	\$743,000	\$1,073,000	\$2,170,000	7	\$442,000	\$707,000	\$1,328,000	21	\$1,185,000	\$1,779,000	\$3,498,000
Tioga	Tioga Municipal Airport	D60	21	\$1,224,000	\$1,667,000	\$2,535,000	8	\$502,000	\$822,000	\$1,530,000	30	\$1,726,000	\$2,488,000	\$4,065,000
Towner	Towner Municipal Airport	D61	<1	\$3,000	\$8,000	\$13,000	<1	\$3,000	\$4,000	\$8,000	<1	\$6,000	\$12,000	\$21,000
Turtle Lake	Turtle Lake Municipal Airport	91N	<1	\$12,000	\$21,000	\$38,000	<1	\$7,000	\$12,000	\$22,000	<1	\$19,000	\$33,000	\$60,000
Valley City	Barnes County Municipal Airport	BAC	11	\$514,000	\$919,000	\$1,387,000	5	\$298,000	\$486,000	\$882,000	16	\$812,000	\$1,405,000	\$2,268,000
Wahpeton	Harry Stern Airport	BWP	25	\$1,468,000	\$1,740,000	\$2,470,000	9	\$535,000	\$869,000	\$1,579,000	34	\$2,003,000	\$2,609,000	\$4,049,000
Walhalla	Walhalla Municipal Airport	96D	9	\$483,000	\$581,000	\$866,000	3	\$168,000	\$279,000	\$507,000	12	\$651,000	\$860,000	\$1,373,000
Washburn	Washburn Municipal Airport	5C8	7	\$381,000	\$496,000	\$814,000	2	\$154,000	\$259,000	\$471,000	9	\$535,000	\$754,000	\$1,285,000
Watford City	Watford City Municipal Airport	S25	56	\$4,710,000	\$6,697,000	\$10,552,000	31	\$1,974,000	\$3,323,000	\$6,122,000	87	\$6,684,000	\$10,020,000	\$16,674,000
West Fargo	West Fargo Municipal Airport	D54	23	\$775,000	\$1,064,000	\$1,712,000	6	\$347,000	\$565,000	\$1,083,000	29	\$1,122,000	\$1,629,000	\$2,795,000
Westhope	Westhope Municipal Airport	D64	3	\$149,000	\$228,000	\$458,000	1	\$82,000	\$140,000	\$257,000	4	\$231,000	\$368,000	\$715,000
Wishek	Wishek Municipal Airport	6L5	3	\$45,000	\$65,000	\$111,000	<1	\$23,000	\$37,000	\$70,000	3	\$68,000	\$102,000	\$181,000
Statewide Total			9,831	\$522,620,000	\$707,611,000	\$1,094,915,000	3,807	\$228,192,000	\$369,515,000	\$695,970,000	13,637	\$750,812,000	\$1,077,126,000	\$1,790,885,000

Note: Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding. Source: Kimley-Horn, 2026.

Table 9-40. Comparison of Economic Impacts by Airport

Airport			2025 NDAEIS			2015 NDAEIS			Percentage Difference 2025–2015 Results			Value Difference 2025–2015 Results		
			Total Impacts			Total Impacts								
Associated City	Airport Name	FAA ID	Jobs	Payroll	Output	Jobs	Payroll	Output	Jobs	Payroll	Output	Jobs	Payroll	Output
Commercial Service														
Bismarck	Bismarck Municipal Airport	BIS	2,107	\$113,445,000	\$284,322,000	2,126	\$86,510,312	\$279,744,887	-1%	31%	2%	-19	\$26,934,688	\$4,577,113
Devils Lake	Devils Lake Regional Airport	DVL	192	\$10,542,000	\$26,360,000	89	\$4,013,851	\$11,811,488	115%	163%	123%	103	\$6,528,149	\$14,548,512
Dickinson	Dickinson – Theodore Roosevelt Regional Airport	DIK	470	\$30,709,000	\$69,764,000	475	\$20,322,935	\$76,618,095	-1%	51%	-9%	-5	\$10,386,065	-\$6,854,095
Fargo	Hector International Airport	FAR	5,569	\$303,467,000	\$665,048,000	3,353	\$142,166,337	\$387,465,584	66%	113%	72%	2,216	\$161,300,663	\$277,582,416
Grand Forks	Grand Forks International Airport	GFK	1,791	\$104,715,000	\$269,861,000	1,669	\$73,622,396	\$199,368,171	7%	42%	35%	122	\$31,092,604	\$70,492,829
Jamestown	Jamestown Regional Airport	JMS	241	\$14,544,000	\$39,164,000	120	\$4,797,458	\$24,425,703	101%	203%	60%	121	\$9,746,542	\$14,738,297
Minot	Minot International Airport	MOT	1,288	\$66,325,000	\$170,971,000	1,985	\$74,678,827	\$254,598,258	-35%	-11%	-33%	-697	-\$8,353,827	-\$83,627,258
Williston	Williston Basin International Airport	XWA	1,099	\$56,446,000	\$149,737,000	1,474	\$57,256,315	\$209,047,988	-25%	-1%	-28%	-375	-\$810,315	-\$59,310,988
General Aviation														
Arthur	Arthur Airport	1A2	<1	\$6,000	\$21,000	0	\$0	\$23,250	N/A	N/A	-10%	N/A	\$6,000	-\$2,250
Ashley	Ashley Municipal Airport	ASY	15	\$782,000	\$1,926,000	17	\$806,986	\$2,382,031	-9%	-3%	-19%	-2	-\$24,986	-\$456,031
Beach	Beach Airport	20U	8	\$505,000	\$1,419,000	13	\$283,851	\$656,324	-36%	78%	116%	-5	\$221,149	\$762,676
Beulah	Beulah Municipal Airport	95D	10	\$426,000	\$759,000	13	\$625,781	\$1,708,123	-27%	-32%	-56%	-3	-\$199,781	-\$949,123
Bottineau	Bottineau Municipal Airport	D09	13	\$713,000	\$1,712,000	10	\$522,677	\$1,546,789	26%	36%	11%	3	\$190,323	\$165,211
Bowbells	Bowbells Municipal Airport	5B4	<1	\$11,000	\$37,000	0	\$0	\$8,200	N/A	N/A	351%	N/A	\$11,000	\$28,800
Bowman	Bowman Regional Airport	BWW	27	\$2,004,000	\$3,563,000	84	\$4,546,230	\$11,879,439	-68%	-56%	-70%	-57	-\$2,542,230	-\$8,316,439
Cando	Cando Municipal Airport	9D7	12	\$647,000	\$1,272,000	14	\$448,730	\$1,821,461	-13%	44%	-30%	-2	\$198,270	-\$549,461
Carrington	Carrington Municipal Airport	46D	8	\$360,000	\$1,033,000	14	\$471,458	\$1,586,478	-40%	-24%	-35%	-6	-\$111,458	-\$553,478
Casselton	Casselton Robert Miller Regional Airport	5N8	48	\$2,482,000	\$4,567,000	55	\$2,192,020	\$5,610,341	-13%	13%	-19%	-7	\$289,980	-\$1,043,341
Cavalier	Cavalier Municipal Airport	2C8	11	\$716,000	\$1,467,000	14	\$573,265	\$1,933,077	-18%	25%	-24%	-3	\$142,735	-\$466,077
Columbus	Columbus Municipal Airport	D49	2	\$6,000	\$16,000	0	\$0	\$3,000	N/A	N/A	433%	2	\$6,000	\$13,000
Cooperstown	Cooperstown Municipal Airport	S32	8	\$398,000	\$754,000	3	\$129,618	\$431,535	154%	207%	75%	5	\$268,382	\$322,465
Crosby	Crosby Municipal Airport	D50	10	\$779,000	\$2,127,000	13	\$452,141	\$1,473,286	-23%	72%	44%	-3	\$326,859	\$653,714

Airport			2025 NDAEIS			2015 NDAEIS			Percentage Difference 2025–2015 Results			Value Difference 2025–2015 Results		
			Total Impacts			Total Impacts								
Associated City	Airport Name	FAA ID	Jobs	Payroll	Output	Jobs	Payroll	Output	Jobs	Payroll	Output	Jobs	Payroll	Output
Drayton	Drayton Municipal Airport	D29	1	\$87,000	\$209,000	1	\$64,809	\$185,378	47%	34%	13%	0	\$22,191	\$23,622
Dunseith	International Peace Garden Airport	S28	10	\$481,000	\$1,499,000	<1	\$0	\$69,753	N/A	N/A	2049%	N/A	\$481,000	\$1,429,247
Edgeley	Edgeley Municipal Airport	51D	3	\$184,000	\$480,000	9	\$408,353	\$1,261,884	-61%	-55%	-62%	-6	-\$224,353	-\$781,884
Elgin	Elgin Municipal Airport	Y71	<1	\$4,000	\$17,000	0	\$0	\$3,625	N/A	N/A	369%	N/A	\$4,000	\$13,375
Ellendale	Ellendale Municipal Airport	4E7	5	\$186,000	\$542,000	9	\$246,800	\$1,031,194	-41%	-25%	-47%	-4	-\$60,800	-\$489,194
Enderlin	Sky Haven Airport	5N4	1	\$74,000	\$226,000	0	\$0	\$72,892	N/A	N/A	210%	1	\$74,000	\$153,108
Fessenden	Fessenden-Streibel Municipal Airport	D24	<1	\$10,000	\$35,000	7	\$336,038	\$874,424	N/A	-97%	-96%	N/A	-\$326,038	-\$839,424
Fort Yates	Standing Rock Airport	Y27	4	\$235,000	\$632,000	<1	\$0	\$7,133	N/A	N/A	8760%	N/A	\$235,000	\$624,867
Gackle	Gackle Municipal Airport	9G9	<1	\$1,000	\$5,000	<1	\$0	\$7,686	N/A	N/A	-35%	N/A	\$1,000	-\$2,686
Garrison	Garrison Municipal Airport	D05	6	\$323,000	\$878,000	6	\$302,006	\$819,976	-2%	7%	7%	0	\$20,994	\$58,024
Glen Ullin	Glen Ullin Regional Airport	D57	6	\$342,000	\$1,021,000	2	\$123,212	\$353,985	181%	178%	188%	4	\$218,788	\$667,015
Grafton	Hutson Field	GAF	15	\$813,000	\$2,222,000	19	\$846,433	\$2,337,041	-21%	-4%	-5%	-4	-\$33,433	-\$115,041
Gwinner	Gwinner-Roger Melroe Field	GWR	9	\$441,000	\$1,171,000	27	\$1,168,122	\$3,701,214	-68%	-62%	-68%	-18	-\$727,122	-\$2,530,214
Harvey	Harvey Municipal Airport	5H4	7	\$304,000	\$677,000	5	\$236,927	\$702,922	36%	28%	-4%	2	\$67,073	-\$25,922
Hazelton	Hazelton Municipal Airport	6H8	1	\$51,000	\$156,000	0	\$0	\$23,250	N/A	N/A	571%	1	\$51,000	\$132,750
Hazen	Mercer County Regional Airport	HZE	14	\$680,000	\$1,826,000	4	\$145,456	\$557,298	240%	367%	228%	10	\$534,544	\$1,268,702
Hettinger	Hettinger – JB Lindquist Regional Airport	HEI	15	\$1,249,000	\$2,303,000	20	\$955,530	\$2,693,237	-24%	31%	-14%	-5	\$293,470	-\$390,237
Hillsboro	Hillsboro Municipal Airport	3H4	28	\$1,728,000	\$4,030,000	24	\$887,146	\$2,922,895	17%	95%	38%	4	\$840,854	\$1,107,105
Kenmare	Kenmare Municipal Airport	7K5	29	\$1,748,000	\$3,602,000	26	\$1,301,723	\$3,034,219	11%	34%	19%	3	\$446,277	\$567,781
Killdeer	Dunn County - Weydahl Field	9Y1	9	\$527,000	\$1,470,000	24	\$1,564,863	\$3,065,201	-63%	-66%	-52%	-15	-\$1,037,863	-\$1,595,201
Kindred	Robert Odegaard Field	K74	13	\$856,000	\$1,766,000	9	\$340,767	\$3,626,376	44%	151%	-51%	4	\$515,233	-\$1,860,376
Kulm	Kulm Municipal Airport	D03	2	\$30,000	\$96,000	3	\$150,192	\$270,422	-18%	-80%	-64%	-1	-\$120,192	-\$174,422
LaMoure	LaMoure Rott Municipal Airport	4F9	6	\$296,000	\$573,000	3	\$129,618	\$361,906	102%	128%	58%	3	\$166,382	\$211,094
Lakota	Lakota Municipal Airport	5L0	8	\$305,000	\$966,000	0	\$0	\$131,082	N/A	N/A	637%	8	\$305,000	\$834,918
Langdon	Robertson Field	D55	9	\$476,000	\$916,000	9	\$289,506	\$1,053,010	-1%	64%	-13%	0	\$186,494	-\$137,010

Airport			2025 NDAEIS			2015 NDAEIS			Percentage Difference 2025–2015 Results			Value Difference 2025–2015 Results		
			Total Impacts			Total Impacts								
Associated City	Airport Name	FAA ID	Jobs	Payroll	Output	Jobs	Payroll	Output	Jobs	Payroll	Output	Jobs	Payroll	Output
Larimore	Larimore Municipal Airport	2L1	18	\$1,010,000	\$1,706,000	12	\$507,389	\$1,886,989	49%	99%	-10%	6	\$502,611	-\$180,989
Leeds	Leeds Municipal Airport	D31	3	\$151,000	\$502,000	2	\$70,700	\$225,343	39%	114%	123%	1	\$80,300	\$276,657
Lidgerwood	Lidgerwood Municipal Airport	4N4	<1	\$3,000	\$12,000	0	\$0	\$9,443	N/A	N/A	27%	N/A	\$3,000	\$2,557
Linton	Linton Municipal Airport	7L2	10	\$545,000	\$1,361,000	12	\$508,504	\$1,589,613	-20%	7%	-14%	-2	\$36,496	-\$228,613
Lisbon	Lisbon Municipal Airport	6L3	14	\$743,000	\$1,545,000	5	\$311,872	\$699,239	170%	138%	121%	9	\$431,128	\$845,761
Maddock	Maddock Municipal Airport	6D3	6	\$331,000	\$637,000	12	\$1,230,638	\$2,012,105	-47%	-73%	-68%	-6	-\$899,638	-\$1,375,105
Mandan	Mandan Regional - Lawler Field	Y19	48	\$2,974,000	\$6,544,000	67	\$3,149,158	\$8,950,629	-28%	-6%	-27%	-19	-\$175,158	-\$2,406,629
Mayville	Mayville Municipal Airport	D56	12	\$692,000	\$1,401,000	20	\$778,094	\$2,436,563	-42%	-11%	-43%	-8	-\$86,094	-\$1,035,563
McClusky	McClusky Municipal Airport	7G2	<1	\$5,000	\$19,000	<1	\$0	\$7,117	N/A	N/A	167%	N/A	\$5,000	\$11,883
McVille	McVille Municipal Airport	8M6	2	\$10,000	\$25,000	0	\$0	\$23,450	N/A	N/A	7%	2	\$10,000	\$1,550
Milnor	Milnor Municipal Airport	4R6	1	\$40,000	\$120,000	0	\$0	\$38,448	N/A	N/A	212%	1	\$40,000	\$81,552
Minto	Minto Municipal Airport	D06	3	\$96,000	\$181,000	6	\$301,736	\$806,069	-57%	-68%	-78%	-3	-\$205,736	-\$625,069
Mohall	Mohall Municipal Airport	HBC	16	\$853,000	\$1,705,000	19	\$631,793	\$2,180,976	-17%	35%	-22%	-3	\$221,207	-\$475,976
Mott	Mott Municipal Airport	3P3	5	\$318,000	\$783,000	4	\$195,633	\$493,806	36%	63%	59%	1	\$122,367	\$289,194
Napoleon	Napoleon Municipal Airport	5B5	6	\$193,000	\$374,000	3	\$129,618	\$372,540	111%	49%	0%	3	\$63,382	\$1,460
New Rockford	Tomlinson Field	8J7	8	\$355,000	\$1,018,000	1	\$64,809	\$217,776	729%	448%	367%	7	\$290,191	\$800,224
New Town	New Town Municipal Airport	05D	8	\$401,000	\$1,304,000	22	\$1,315,808	\$3,217,102	-64%	-70%	-59%	-14	-\$914,808	-\$1,913,102
Northwood	Northwood Municipal – Vince Field	4V4	13	\$656,000	\$1,556,000	6	\$254,467	\$877,356	114%	158%	77%	7	\$401,533	\$678,644
Oakes	Oakes Municipal Airport	2D5	7	\$372,000	\$738,000	19	\$637,092	\$2,337,630	-64%	-42%	-68%	-12	-\$265,092	-\$1,599,630
Page	Page Regional Airport	64G	14	\$805,000	\$1,274,000	13	\$498,619	\$2,085,675	5%	61%	-39%	1	\$306,381	-\$811,675
Park River	Park River - W C Skjerven Field	Y37	11	\$653,000	\$1,490,000	8	\$388,854	\$1,108,549	38%	68%	34%	3	\$264,146	\$381,451
Parshall	Parshall-Hankins Airport	Y74	7	\$287,000	\$821,000	7	\$440,805	\$1,106,385	2%	-35%	-26%	0	-\$153,805	-\$285,385
Pembina	Pembina Municipal Airport	PMB	10	\$642,000	\$1,255,000	10	\$405,928	\$1,400,955	3%	58%	-10%	0	\$236,072	-\$145,955
Plaza	Trulson Field	Y99	<1	\$2,000	\$8,000	0	\$0	\$3,000	N/A	N/A	167%	N/A	\$2,000	\$5,000
Richardton	Richardton Municipal Airport	4E8	<1	\$3,000	\$12,000	0	\$0	\$6,033	N/A	N/A	99%	N/A	\$3,000	\$5,967

Airport			2025 NDAEIS			2015 NDAEIS			Percentage Difference 2025–2015 Results			Value Difference 2025–2015 Results		
			Total Impacts			Total Impacts								
Associated City	Airport Name	FAA ID	Jobs	Payroll	Output	Jobs	Payroll	Output	Jobs	Payroll	Output	Jobs	Payroll	Output
Riverdale	Garrison Dam Recreational Airpark	37N	1	\$11,000	\$32,000	<1	\$1,800	\$17,369	N/A	511%	84%	N/A	\$9,200	\$14,631
Rolette	Rolette Airport	2H9	1	\$33,000	\$117,000	5	\$213,471	\$649,140	-87%	-85%	-82%	-4	-\$180,471	-\$532,140
Rolla	Rolla Municipal Airport	06D	19	\$1,015,000	\$1,908,000	21	\$866,159	\$2,680,203	-8%	17%	-29%	-2	\$148,841	-\$772,203
Rugby	Rugby Municipal Airport	RUG	15	\$908,000	\$1,851,000	9	\$380,677	\$1,040,119	63%	139%	78%	6	\$527,323	\$810,881
St. Thomas	St. Thomas Municipal Airport	4S5	3	\$205,000	\$384,000	3	\$129,618	\$357,925	10%	58%	7%	0	\$75,382	\$26,075
Stanley	Stanley Municipal Airport	08D	21	\$1,185,000	\$3,498,000	20	\$928,496	\$2,442,100	7%	28%	43%	1	\$256,504	\$1,055,900
Tioga	Tioga Municipal Airport	D60	30	\$1,726,000	\$4,065,000	34	\$1,492,413	\$3,878,182	-12%	16%	5%	-4	\$233,587	\$186,818
Towner	Towner Municipal Airport	D61	<1	\$6,000	\$21,000	0	\$0	\$24,050	N/A	N/A	-13%	N/A	\$6,000	-\$3,050
Turtle Lake	Turtle Lake Municipal Airport	91N	<1	\$19,000	\$60,000	0	\$0	\$51,241	N/A	N/A	17%	N/A	\$19,000	\$8,759
Valley City	Barnes County Municipal Airport	BAC	16	\$812,000	\$2,268,000	22	\$901,786	\$2,803,132	-29%	-10%	-19%	-6	-\$89,786	-\$535,132
Wahpeton	Harry Stern Airport	BWP	34	\$2,003,000	\$4,049,000	36	\$1,446,088	\$4,397,025	-7%	39%	-8%	-2	\$556,912	-\$348,025
Walhalla	Walhalla Municipal Airport	96D	12	\$651,000	\$1,373,000	12	\$580,058	\$1,559,947	0%	12%	-12%	0	\$70,942	-\$186,947
Washburn	Washburn Municipal Airport	5C8	9	\$535,000	\$1,285,000	0	\$0	\$138,429	N/A	N/A	828%	9	\$535,000	\$1,146,571
Watford City	Watford City Municipal Airport	S25	87	\$6,684,000	\$16,674,000	44	\$2,063,056	\$5,205,805	98%	224%	220%	43	\$4,620,944	\$11,468,195
West Fargo	West Fargo Municipal Airport	D54	29	\$1,122,000	\$2,795,000	12	\$374,063	\$1,262,928	143%	200%	121%	17	\$747,937	\$1,532,072
Westhope	Westhope Municipal Airport	D64	4	\$231,000	\$715,000	3	\$129,618	\$355,215	28%	78%	101%	1	\$101,382	\$359,785
Wishek	Wishek Municipal Airport	6L5	3	\$68,000	\$181,000	0	\$0	\$85,259	N/A	N/A	112%	3	\$68,000	\$95,741
Statewide Total			13,635	\$750,813,000	\$1,790,885,000	12,217	\$505,247,509	\$1,564,352,371	12%	49%	14%	1,418	\$245,565,491	\$226,532,629

Note: Dollar values rounded to the nearest 1,000. Totals may not sum due to rounding. Results from 2015 NDAEIS remained unchanged from source material, resulting in unrounded dollar value differences. Sources: 2015 NDAEIS, 2026; Kimley-Horn, 2026.



Table 9-41. Tax Revenue Impacts by Airport

Associated City	Airport Name	FAA ID	Federal Taxes	State Taxes	Local Taxes	Total Taxes
Commercial Service						
Bismarck	Bismarck Municipal	BIS	\$40,254,000	\$6,769,000	\$1,139,000	\$48,162,000
Devils Lake	Devils Lake Regional	DVL	\$4,544,000	\$603,000	\$94,000	\$5,241,000
Dickinson	Dickinson – Theodore Roosevelt Regional Airport	DIK	\$7,620,000	\$1,748,000	\$308,000	\$9,676,000
Fargo	Hector International	FAR	\$82,283,000	\$15,381,000	\$2,597,000	\$100,261,000
Grand Forks	Grand Forks International	GFK	\$29,641,000	\$5,350,000	\$887,000	\$35,878,000
Jamestown	Jamestown Regional	JMS	\$4,395,000	\$887,000	\$151,000	\$5,433,000
Minot	Minot International	MOT	\$29,768,000	\$4,148,000	\$676,000	\$34,592,000
Williston	Williston Basin International	XWA	\$18,486,000	\$3,909,000	\$698,000	\$23,093,000
General Aviation						
Arthur	Arthur Airport	1A2	\$2,000	<\$1,000	<\$1,000	\$2,000
Ashley	Ashley Municipal Airport	ASY	\$177,000	\$37,000	\$6,000	\$220,000
Beach	Beach Airport	20U	\$114,000	\$26,000	\$4,000	\$145,000
Beulah	Beulah Municipal Airport	95D	\$91,000	\$17,000	\$3,000	\$111,000
Bottineau	Bottineau Municipal Airport	D09	\$152,000	\$38,000	\$6,000	\$196,000
Bowbells	Bowbells Municipal Airport	5B4	\$2,000	<\$1,000	<\$1,000	\$4,000
Bowman	Bowman Regional Airport	BWW	\$379,000	\$69,000	\$11,000	\$458,000
Cando	Cando Municipal Airport	9D7	\$137,000	\$27,000	\$4,000	\$168,000



Associated City	Airport Name	FAA ID	Federal Taxes	State Taxes	Local Taxes	Total Taxes
Carrington	Carrington Municipal Airport	46D	\$81,000	\$22,000	\$4,000	\$106,000
Casselton	Casselton Robert Miller Regional Airport	5N8	\$480,000	\$91,000	\$14,000	\$585,000
Cavalier	Cavalier Municipal Airport	2C8	\$158,000	\$30,000	\$5,000	\$192,000
Columbus	Columbus Municipal Airport	D49	\$1,000	<\$1,000	<\$1,000	\$2,000
Cooperstown	Cooperstown Municipal Airport	S32	\$89,000	\$17,000	\$3,000	\$109,000
Crosby	Crosby Municipal Airport	D50	\$171,000	\$39,000	\$6,000	\$216,000
Drayton	Drayton Municipal Airport	D29	\$20,000	\$4,000	<\$1,000	\$25,000
Dunseith	International Peace Garden Airport	S28	\$121,000	\$27,000	\$4,000	\$152,000
Edgeley	Edgeley Municipal Airport	51D	\$44,000	\$10,000	\$2,000	\$56,000
Elgin	Elgin Municipal Airport	Y71	\$1,000	<\$1,000	<\$1,000	\$2,000
Ellendale	Ellendale Municipal Airport	4E7	\$43,000	\$11,000	\$2,000	\$56,000
Enderlin	Sky Haven Airport	5N4	\$16,000	\$5,000	<\$1,000	\$23,000
Fessenden	Fessenden-Streibel Municipal Airport	D24	\$3,000	<\$1,000	<\$1,000	\$4,000
Fort Yates	Standing Rock Airport	Y27	\$54,000	\$11,000	\$2,000	\$66,000
Gackle	Gackle Municipal Airport	9G9	<\$1,000	<\$1,000	<\$1,000	<\$1,000
Garrison	Garrison Municipal Airport	D05	\$74,000	\$18,000	\$3,000	\$95,000
Glen Ullin	Glen Ullin Regional Airport	D57	\$82,000	\$19,000	\$3,000	\$104,000
Grafton	Hutson Field	GAF	\$187,000	\$45,000	\$8,000	\$240,000
Gwinner	Gwinner-Roger Melroe Field	GWR	\$95,000	\$26,000	\$5,000	\$126,000



Associated City	Airport Name	FAA ID	Federal Taxes	State Taxes	Local Taxes	Total Taxes
Harvey	Harvey Municipal Airport	5H4	\$73,000	\$15,000	\$2,000	\$90,000
Hazleton	Hazleton Municipal Airport	6H8	\$13,000	\$3,000	<\$1,000	\$16,000
Hazen	Mercer County Regional Airport	HZE	\$155,000	\$34,000	\$6,000	\$195,000
Hettinger	Hettinger – JB Lindquist Regional Airport	HEI	\$239,000	\$44,000	\$7,000	\$290,000
Hillsboro	Hillsboro Municipal Airport	3H4	\$370,000	\$84,000	\$14,000	\$468,000
Kenmare	Kenmare Municipal Airport	7K5	\$365,000	\$80,000	\$13,000	\$458,000
Killdeer	Dunn County - Weydahl Field	9Y1	\$126,000	\$26,000	\$4,000	\$156,000
Kindred	Robert Odegaard Field	K74	\$179,000	\$33,000	\$5,000	\$217,000
Kulm	Kulm Municipal Airport	D03	\$9,000	\$2,000	<\$1,000	\$11,000
LaMoure	LaMoure Rott Municipal Airport	4F9	\$65,000	\$12,000	\$2,000	\$78,000
Lakota	Lakota Municipal Airport	5L0	\$79,000	\$19,000	\$3,000	\$101,000
Langdon	Robertson Field	D55	\$110,000	\$20,000	\$3,000	\$133,000
Larimore	Larimore Municipal Airport	2L1	\$211,000	\$38,000	\$6,000	\$254,000
Leeds	Leeds Municipal Airport	D31	\$43,000	\$9,000	\$1,000	\$53,000
Lidgerwood	Lidgerwood Municipal Airport	4N4	\$1,000	<\$1,000	<\$1,000	\$1,000
Linton	Linton Municipal Airport	7L2	\$127,000	\$28,000	\$5,000	\$160,000
Lisbon	Lisbon Municipal Airport	6L3	\$169,000	\$32,000	\$5,000	\$205,000
Maddock	Maddock Municipal Airport	6D3	\$62,000	\$12,000	\$2,000	\$75,000
Mandan	Mandan Regional - Lawler Field	Y19	\$847,000	\$124,000	\$18,000	\$989,000



Associated City	Airport Name	FAA ID	Federal Taxes	State Taxes	Local Taxes	Total Taxes
Mayville	Mayville Municipal Airport	D56	\$150,000	\$32,000	\$5,000	\$187,000
McClusky	McClusky Municipal Airport	7G2	\$2,000	<\$1,000	<\$1,000	\$2,000
McVile	McVile Municipal Airport	8M6	\$2,000	<\$1,000	<\$1,000	\$3,000
Milnor	Milnor Municipal Airport	4R6	\$10,000	\$2,000	<\$1,000	\$13,000
Minto	Minto Municipal Airport	D06	\$22,000	\$4,000	<\$1,000	\$27,000
Mohall	Mohall Municipal Airport	HBC	\$187,000	\$37,000	\$6,000	\$229,000
Mott	Mott Municipal Airport	3P3	\$74,000	\$15,000	\$2,000	\$91,000
Napoleon	Napoleon Municipal Airport	5B5	\$42,000	\$8,000	\$1,000	\$51,000
New Rockford	Tomlinson Field	8J7	\$86,000	\$18,000	\$3,000	\$107,000
New Town	New Town Municipal Airport	05D	\$103,000	\$27,000	\$5,000	\$134,000
Northwood	Northwood Municipal – Vince Field	4V4	\$145,000	\$34,000	\$6,000	\$184,000
Oakes	Oakes Municipal Airport	2D5	\$81,000	\$16,000	\$3,000	\$99,000
Page	Page Regional Airport	64G	\$153,000	\$24,000	\$4,000	\$181,000
Park River	Park River - W C Skjerven Field	Y37	\$141,000	\$31,000	\$5,000	\$176,000
Parshall	Parshall-Hankins Airport	Y74	\$63,000	\$17,000	\$3,000	\$83,000
Pembina	Pembina Municipal Airport	PMB	\$130,000	\$26,000	\$4,000	\$160,000
Plaza	Trulson Field	Y99	<\$1,000	<\$1,000	<\$1,000	\$1,000
Richardton	Richardton Municipal Airport	4E8	\$1,000	<\$1,000	<\$1,000	\$1,000
Riverdale	Garrison Dam Recreational Airpark	37N	\$2,000	<\$1,000	<\$1,000	\$3,000



Associated City	Airport Name	FAA ID	Federal Taxes	State Taxes	Local Taxes	Total Taxes
Rolette	Rolette Airport	2H9	\$10,000	\$2,000	<\$1,000	\$13,000
Rolla	Rolla Municipal Airport	06D	\$213,000	\$41,000	\$7,000	\$261,000
Rugby	Rugby Municipal Airport	RUG	\$197,000	\$40,000	\$6,000	\$243,000
St. Thomas	St. Thomas Municipal Airport	4S5	\$44,000	\$8,000	\$1,000	\$53,000
Stanley	Stanley Municipal Airport	08D	\$254,000	\$63,000	\$11,000	\$328,000
Tioga	Tioga Municipal Airport	D60	\$333,000	\$96,000	\$17,000	\$446,000
Towner	Towner Municipal Airport	D61	\$2,000	<\$1,000	<\$1,000	\$2,000
Turtle Lake	Turtle Lake Municipal Airport	91N	\$4,000	\$1,000	<\$1,000	\$6,000
Valley City	Barnes County Municipal Airport	BAC	\$235,000	\$46,000	\$7,000	\$288,000
Wahpeton	Harry Stern Airport	BWP	\$419,000	\$86,000	\$14,000	\$519,000
Walhalla	Walhalla Municipal Airport	96D	\$139,000	\$29,000	\$5,000	\$172,000
Washburn	Washburn Municipal Airport	5C8	\$121,000	\$26,000	\$4,000	\$151,000
Watford City	Watford City Municipal Airport	S25	\$1,396,000	\$319,000	\$52,000	\$1,767,000
West Fargo	West Fargo Municipal Airport	D54	\$229,000	\$131,000	\$26,000	\$386,000
Westhope	Westhope Municipal Airport	D64	\$59,000	\$13,000	\$2,000	\$74,000
Wishek	Wishek Municipal Airport	6L5	\$14,000	\$4,000	<\$1,000	\$19,000
Statewide Total			\$228,071,000	\$41,195,000	\$6,940,000	\$276,213,000

Note: Tax values are reported to the nearest thousand, with amounts below \$1,000 shown as "< \$1,000." Sources: IMPLAN, 2025; Kimley-Horn, 2026.