



Introductions

- IDOT Bureau of Planning
- IDOT Aeronautics
- TAC Members
- Consultant team
 - Kimley-Horn
 - CMT
 - Hanson
 - EBP US









Agenda

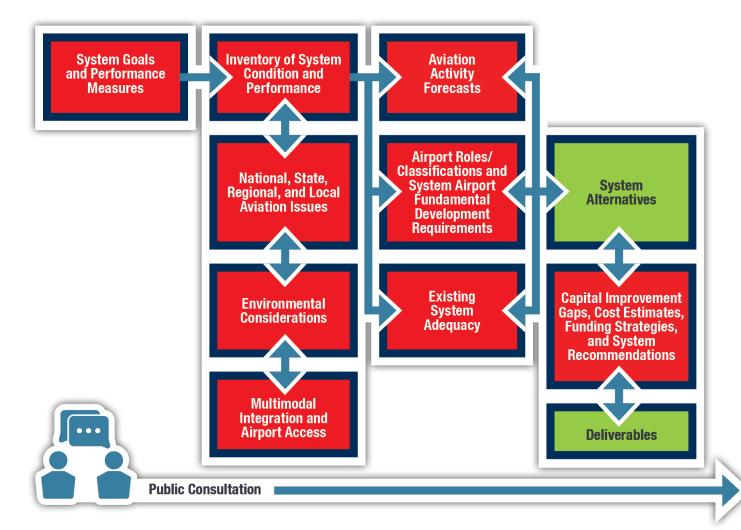
- 1. Project Recap
- 2. Future System Performance
- 3. Aviation Activity Forecasts
- 4. Cost Estimates
- 5. IASP Recommendations
- 6. Deliverables
- 7. Next Steps





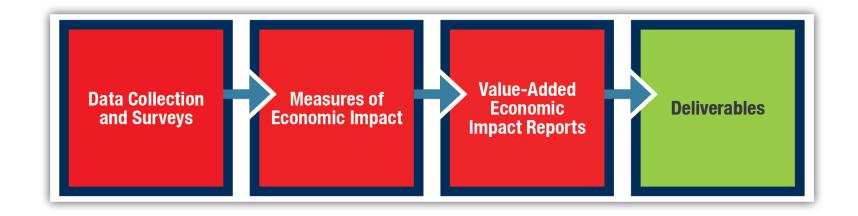


IASP Progress







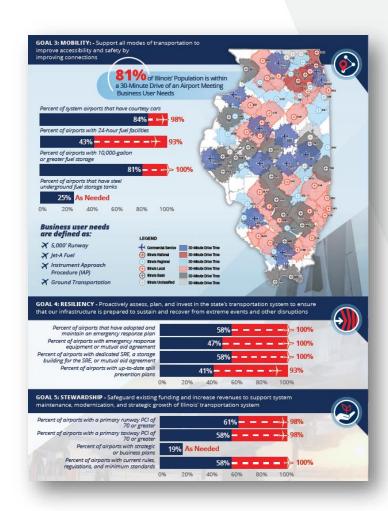






Future Performance Targets

- Important for measuring improvements over time
- Identifies the ultimate performance level
- Identifies gaps or deficiencies in performance
- Contributes to recommendation development
- Informs decision-making about resource allocation

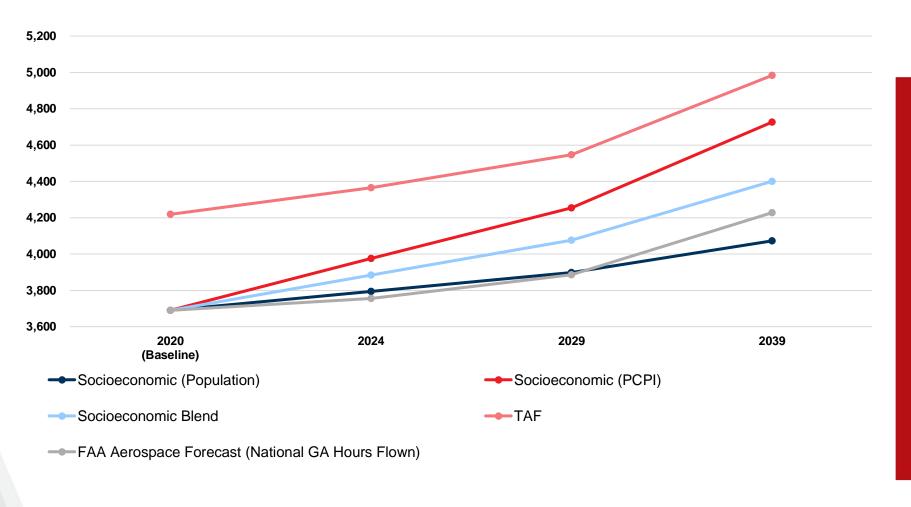


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Based Aircraft

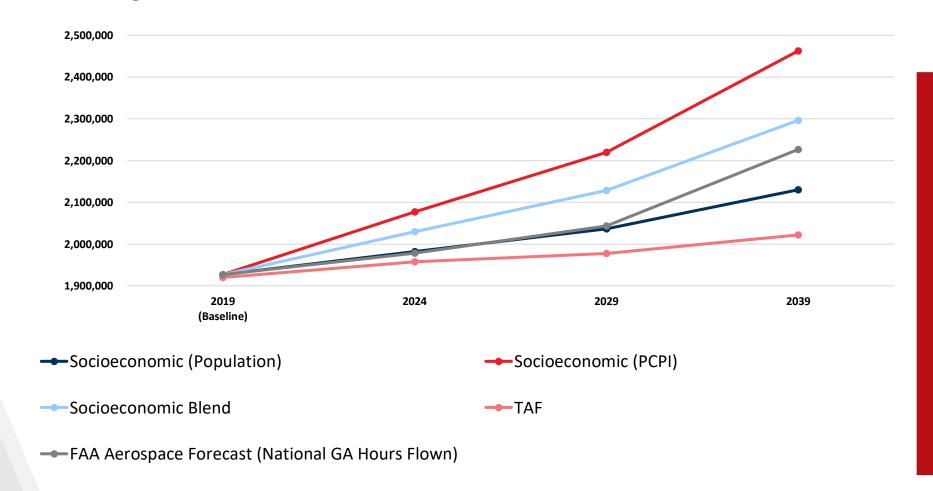




Statewide based aircraft are projected to grow 19%, or to 4,400 by 2039



GA Operations



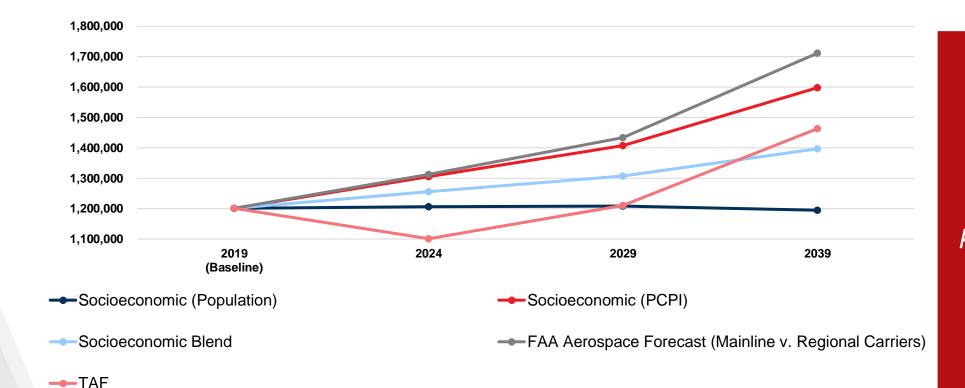


Statewide GA
Operations are
projected to grow
16%, or to 2.3
million by 2039

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Commercial Service Operations

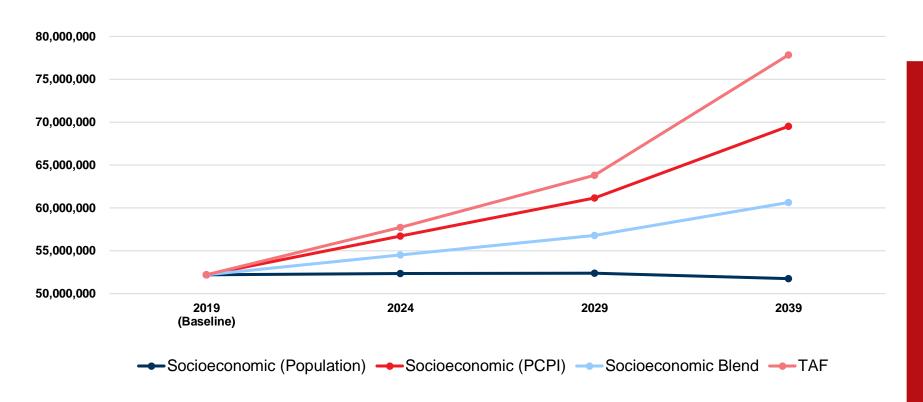




Statewide CS
Operations are
projected to grow
22%, or to 1.5
million by 2039



Enplanements





Statewide enplanements are projected to grow 49%, or to 77.8 million by 2039

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Forecast Summary

Forecast	Preferred Methodology	Base Year	2024	2029	2034	2039	AAGR
Enplanements	TAF	52,190,800	57,701,600	63,821,200	70,703,400	77,838,700	2.02%
General Aviation Operations	National GA Hours Flown	1,927,400	1,978,700	2,043,500	2,123,200	2,226,600	0.72%
Commercial Service Operations	TAF	1,201,800	1,102,000	1,210,800	1,334,600	1,463,100	0.99%
Based Aircraft	Socioeconomic Blend (Population & PCPI)	3,690	3,885	4,076	4,242	4,400	0.87%

^{*}FAA review process is ongoing



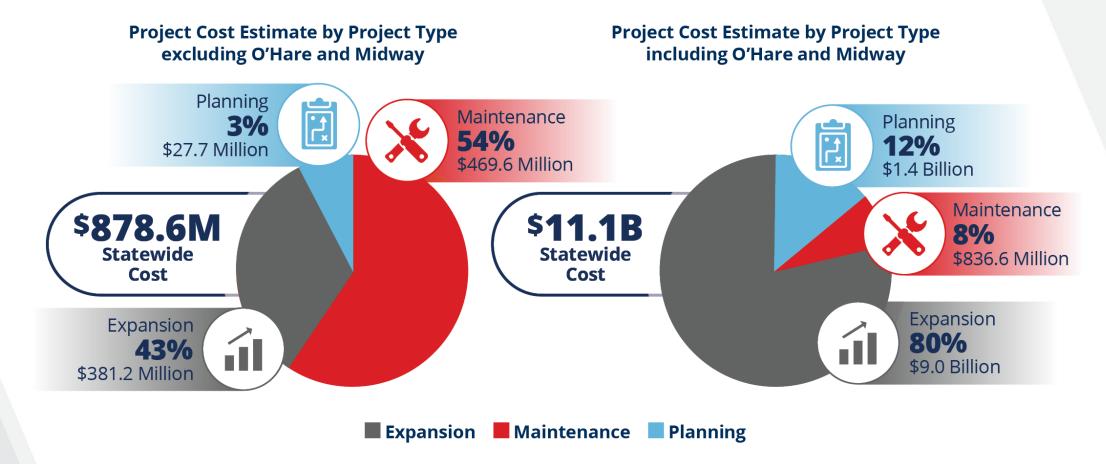


Methodology

- Needs quantified from deficiencies identified in the future performance process
- Planning level cost estimates, Rough Order of Magnitude (ROM)
- Removed duplicates (similar needs from PMs, FSOs, etc.)
- ORD and MDW CIP



20-Year System Needs







Follow-On Study Considerations

- Airport Pavement Management System
- General Aviation Runway Safety Area Inventory
- Heliport and Vertiport System Plan
- IDOT Aeronautics Procedures Manual
- Recurring Economic Impact Analysis
- Runway Protection Zone and Obstruction Analysis
- Advanced Air Mobility Integration
- Aircraft Operational Counts at Non-Towered Airports



Future Policy Considerations

- ✓ Dedicated Aviation Funding
- **✓** Environmental Justice
- **✓** IDOT Aeronautics Staffing
- ✓ Web-Based Managment Programs





IASP Full Technical Report



- Chapter 1: System Goals and PMs
- Chapter 2: Airport Classifications
- Chapter 3: Existing and Future System Adequacy
- Chapter 4: Aviation Issues
- Chapter 5: Multimodal Integration and Airport Access
- Chapter 6: Land Use Evaluation and Environmental Considerations
- Chapter 7: Aviation Activity Forecasts
- Chapter 8: Future Aviation Scenarios
- Chapter 9: Cost Estimates
- Chapter 10: System Recommendations
- Appendix A: Airport Report Cards



Chapter 9. Cost Estimate 9.1. Introduction Illinois' aviation system should be developed so that it can support the needs of current and future demand. To continue to meet such needs, the Illinois Department of Transportation (IDOT) understands that maintaining and expanding the system requires continued investment. The focus of this chapter is to present the cost estimates for recommended projects needed to maintain and expand the system over 20-year planning horizon (2019 - 2039). IASP cost estimates are presented by Goal. Facility and Service Objective (FSO), and by systemwide minimums. IASP cost estimates are further organized in each subsection and presented by project type (i.e., planning, maintenance, or expansion), project timeframe (i.e., near-, mid-, and long-term), as well as The sections in this chapter are presented as follows IASP Cost Estimates by Goa IASP Cost Estimates by Facility & Service Objective
 IASP Cost Estimates by Systemwide Minimums and Service Objectives (ESOs), and systemwide minimums (see Chapter 3 - Existing and Future Chapter 2. Airport Classifications Illinois is home to a diverse and varied system of airports, including 85 public-use facilities that vary in physical and/or operational size, location, as well as type of users they serve. These facilities consist of general aviation (GA) and commercial service airports; however, there are also two heliports included in the system. Given the large variations among these facilities, it is critical to identify how each function within Illinois's system, grounded on the understanding that each has their own unique set of opportunities and challenges. Commercial service airports accommodate a large assortment of passenger jets and provid sophisticated facilities and services to support the heavy flow of traffic and range of user needs. Though critical to the service and function of commercial service airports, these facilities and services are not necessary at all airports across the system. For example, Chicago O'Hare International's facilities include numerous passenger concourses, automated people movers, and several10,000'-plus long runways while smaller commercial service airports, such as Quincy Regional have no passenger concourses and Similarly, GA airports typically offer a completely different set of facilities and services that are designed to accommodate diverse types of aircraft. GA facilities serve a wide range of users that vary from corporate jets that traverse the globe to rural facilities providing agricultural support services and A variety of factors contribute to an airport's operational ability and level of activity. These factors include the physical characteristics of an airport such as the runway dimensions, taxiway types, and aircraft storage as well as external factors such as the geographic location, the density of the surrounding population, proximity to economic centers, different surrounding land uses, and more. As described, classifying the function or role that each airport plays in the statewide aviation system, driven by different physical or external factors, is a critical component of the aviation system planning process. The airport classification process helps to identify like-airports that serve similar users, experience comparable levels of activity, offer similar facilities or services, and overall, function alike within the system. Classifying airports into distinctive roles at the state level allows for coordinated and informed decisions to be made about future development and resource allocation. It is important to note that classifying airports into different roles occurs at both the national level by the Federal Aviation Administration (FAA) and at the state level through the system planning process. In addition to federal and state airport classification processes, this chapter introduces Facility and Service Objectives (FSOs), FSOs outline the minimum suggested level of facilities and services needed within each airport role to optimally support the type and volume of aviation activity typified by that state role. ESOs can be thought of as benchmarks that airport managers and IDOT Aeronautics can use to Illimpis Department of Transportation

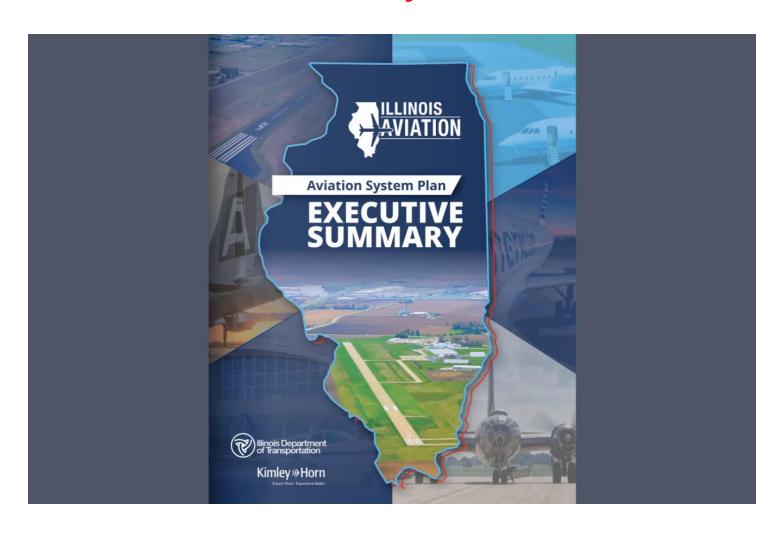
Case Studies

- Ultra-Low Cost Carriers in Illinois
- Agriculture and Sustainability at Illinois Airports
- Illinois Airports Role in Emergency Response
- Military Aviation In Illinois
- Aviation and Aerospace Education in Illinois
- Airports and COVID-19 Relief Efforts
- Supporting Illinois' Businesses and Industries
- Enhancing Access for Rural Areas
- Air Cargo and Shipping



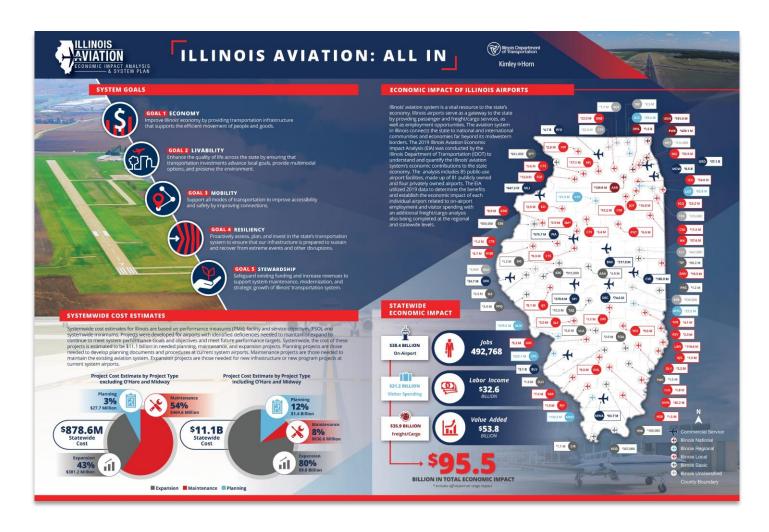


IASP Executive Summary





IASP & EIA Project Summary Poster



EIA Full Technical Report

- Chapter 1: Introduction
- Chapter 2: District Approach
- Chapter 3: Data Sources and Modeling
- Chapter 4: Economic **Assessment**
- Chapter 5: Systemwide Impacts
- Chapter 6: Economic Impact **Matrices**



Chapter 4. Economic Assessment The three components of the economic impact analysis are presented in this section

Each component includes a review of how data were collected and assembled and a summary of

4.1. On-Airport Impacts

On-airport impacts are the sum of airport manage activities of business tenants that are located on a airport managers and airport tenants. Direct impacts of Illinois airport administration, te billion in business revenue in the state, sustaining t labor income. Impacts do not stop at airport fer

Chapter 5. Systemwide Impacts Across Illinois, public use airports contribute more than \$95.5 billion to the state economy in terms of

ee leading drivers of these econ

gross business revenues, including almost \$54 billion in value added and a total of nearly 493,000 jobs. Depending on the measure, direct impacts account for 52 to 56 percent of the total contribution of airports to the Illinois economy, while multiplier effects account for 44 to 48 percent of all impacts.

> oution of Illinois public use airports impacts total \$52.5 billion, including about ch supports nearly 256,000 jobs and \$18 billion in total labor income (Tabl



Chapter 3. Data Sources and Modeling

The key data sources for this study include airport site visits and the completion of the EIA Inventory Form for each airport, visitor spending surveys, and the data set that is behind the IMPLAN model. Models Department of Transportation and the U.S. Department of Commerce Foreign Trade Database

This chapter includes the following six tables.

Table 6.1. Direct On-Airport Impacts. Displays the sum of direct on-airport effects from airpo struction, and tenants impacts in terms of jobs, labor income, value added, and

at each Illinois airport Visitor Spending Impacts. Displays the impacts of direct spending by visitors to Illinois

abor income, value added, and visitor spending (business revenues). Impacts by Airport. Displays the impacts of each airport within its home District as ois Department of Transportation in terms of jobs. Jabor income, value added, and

difference between district and state impacts is that spillover impacts are not counter ncome re-spending occur in another Illinois district. This table is useful for displaying a an airport, not the airport's impact on the statewide economy

supplier sales

es at Illinois

state and

ant impacts are

om table to table

s revenues and

The Illinois Department of Transportation conducted a study to assess the economic and social contributions of Illinois airports to the state economy. The study, referred to as the Illinois Aviatio Economic Impact Analysis (EIA), captures both quantitative economic impacts and community benefits Illinois's businesses and communities. This study complements the Illinois Aviation System Plan (IASP) that describes the role of each airport in the state, inventories the condition of facilities, and identifies needed investments to ensure that appropriate aviation services are available to communities and businesses across Illinois. Economic impacts are generated by Illinois airports in the state because

 Provides for personal travel of state residents across the U.S. and to international destinations
 Facilitates visitor arrivals into Illinois who in turn support hospitality sectors in the state; and
 Support lillinois-based companies by enabling efficient long-distance business travel and the transporting of air cargo.

Airports are job centers that host airlines and general aviation (GA) facilities, along with services that support aircraft maintenance and operations, and provide amenities to passengers and crews. Airports safety and efficiency of aviation activity.

- Jobs and business revenues generated on airport properties, including capital expenditures
 Dollars brought into the state from out-of-state visitors who arrive using one of Illinois' airports.
- Support given to state industries from air cargo services provided at Illinois airports; and

 The contribution of aviation to the Illinois gross domestic product (GDP). This study does not count spending by Illinois residents who travel by air from one part of the state to

another. Also, while air cargo is specified as commodities used and produced by Illinois businesses that are located off airport, the labor of loading, unloading, transporting, and storing all cargo flying in and out of Illinois airports is captured in the analysis of airport tenants (including commodities trucked to/from

1.2. Overview of the Illinois Airport System

The 2019 Illinois Aviation EIA includes 85 airports, 12 that offer commercial service and 73 that are focused solely on GA. Table 1.1 lists the 85 airports in the system which comprise 12 commercial service. airports and 73 GA airports. It should be noted that the 12 airports classified as commercial service also



5 664 \$379 756 To quantify each airport's individual economic is statewide economic impact, direct impacts had to data associated with airport administration, on-air spending. 2019 direct data were gathered thou hard-copy surveys were distributed to each of the 8 Illinois covers 58,000 square miles and is made up of almost 13 million residents and 320,000 (laviation com) was developed to disseminate info establishments that employ 5.5 million people and generated a 2019 GSP of \$886 billion. However densities and economic development are not uniformly spread out across the state. Across Illinois's 102 access to a digital/online version of the survey in I nties, the population ranges from 3,800 to more than five million, and GSP per capita stretches from various surveys deployed to gather direct data for about \$16,000 to \$108,000 per county. To cast the economic analysis of Illinois airports in th The IMPLAN (Version 3, 2018) economic mode study was approached through nine districts, each of defined by IDOT. A map of district geographies is p output model in the United States, with data derive The analysis is based on industry specific relation income, value added, and business revenues) for business revenues at the district level. As data ob to two- to five-digit groups in the North America airports and for visitor spending often has one or missing variables, district-specific, not homogeneous IMPLAN was calibrated for each Illinois district a district vary between industry mix, productivity of industry. Therefore, the relationships of employments averages are used to account for missing direct va 1.1. Purpose of the Study effects for each of the 546 industries will differ a revenues based on industry ratios. By employing di level averages, analyses of airports reflect localiboth IDOT district-specific and statewide effects economic conditions to account for the missing dire impact factors. For example, construction spending provided by airports and visitor spending data are reported as total expenditures without identification mployment and labor income generated from the activities. Similarly, while the EIA Inventory Form as for employment and labor income from business te most tenants provided employment numbers with income. Business revenues from private sector ten considered proprietary by business owners and val added is always calculated from labor income an This study is both statewide and multi-regional, and statewide multiplier effects and total state econor

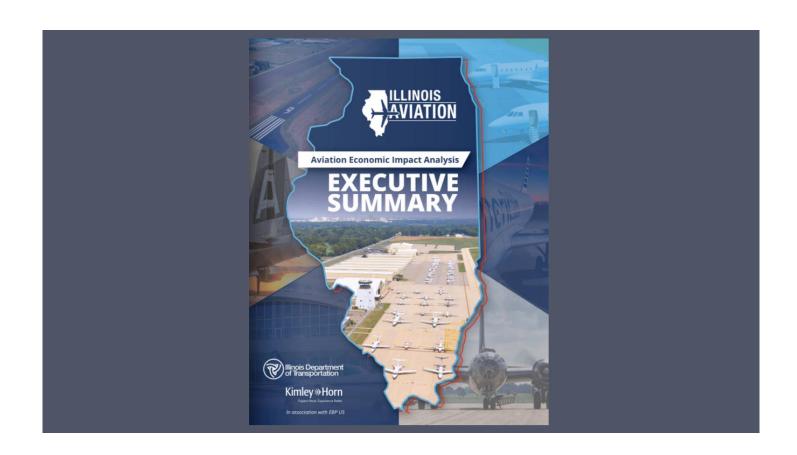
impacts, as well the total impacts of Illinois aviation each of the nine DOT districts and impacts for each when using only district level multipliers.

Chapter 6 to this report includes the impacts of ea

as a detailed multi-regional report that accounts for effects across district boundaries within the state.



EIA Executive Summary

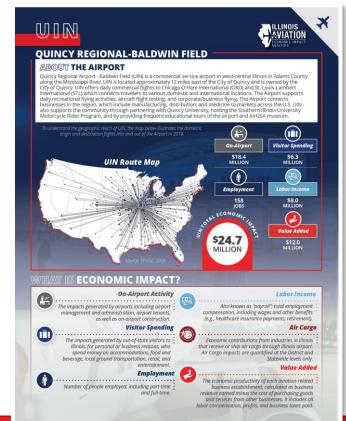


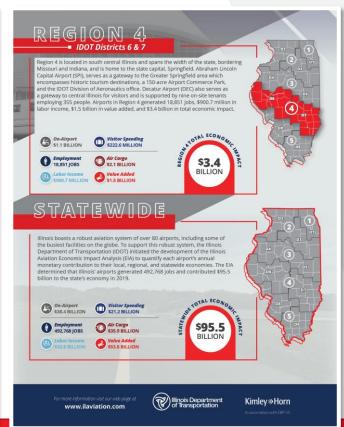
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EIA Individual Airport Brochures & PowerPoints

- Notify local and regional stakeholders
- Communicate results with local and regional government officials
- Communicate results with local media
- Upload results to airport website

















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Next Steps

- Finalize forecasts + FAA review
- Finalize System Alternatives, send to TAC
- Finalize Recommendations, send to TAC
- Send IASP Executive Summary to TAC
- Send IASP & EIA Project Poster to TAC
- Finalize Primers and sent to TAC



Thank you for your participation!

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