Illinois Aviation System Plan (IASP) and Economic Impact Analysis (EIA)
Technical Advisory Committee (TAC) Meeting #5 Summary
Tuesday, February 1, 2022

Attendees

- Jason Osborn (IDOT)
- Clayton Stambaugh (IDOT)
- BJ Murray (IDOT)
- Rick Borus (IDOT)
- Clark Kaericher (Illinois Chamber of Commerce)
- Kyle Lewis (AOPA)
- Ken Bro (Southern Illinois University)
- Tom Cleveland (DuPage Airport)
- Mark Doles (DuPage Airport)
- Mike Brown (FAA)
- Ben Leischner (Quad City International Airport)
- Chris Trone (Schuy-Rush Airport)
- Thomas Murtha (CMAP)
- Julian Federle (United Airlines)
- Jamie Rhee (CDA)
- Malika Hainer (CDA)
- Kevin Brubaker (ELPC)
- Stacy Meyers (ELPC)
- Zach DeVeau (Kimley-Horn)
- Tom Gibson (Kimley-Horn)

Meeting Overview

The Kimley-Horn Project Manager, Zach DeVeau, presented the agenda for the meeting. The agenda is provided below:

- Project Recap
- Future System Performance
- Aviation Activity Forecasts
- Cost Estimates
- IASP Future Considerations
- Deliverables
- Next Steps

1. **Project Recap**

   This portion of the presentation by Zach DeVeau highlighted the various tasks and progress that has been made since the beginning of the project in late 2019. Zach reminded the group of the following:

- IASP Goals derive from the state's Long Range Transportation Plan (LRTP). Performance Measures (PMs) and Performance Indicators (PIs) were developed under each goal and became the foundation of the system plan.
- The project team, including Hanson and CMT, conducted virtual interviews throughout the state to gather data from system airports which became the baseline data for most analyses.
- The project team re-evaluated the state's airport classifications which resulted in a newly developed flow chart methodology that reclassified some Local airports to Illinois Regional. It should be noted that these classification changes were only conducted at the state level. The airports that moved up to Illinois Regional in the IASP are still Local airports in the National Plan of Integrated Airport Systems (NPIAS) at the time of this meeting.

- Environmental conditions around airports were evaluated as it relates to future development. The team evaluated land within a 1,000-foot buffer of their Runway Safety Area(s)(RSAs) to determine if environmental conditions could impact future development.
- Modal conditions to airports in the state were also evaluated to document existing access to state airports. Data was retrieved from various online sources as well as from the airports.
- National, state, regional, and local aviation issues that could affect the state's airports were also evaluated. Those issues include: Aviation infrastructure, aviation workforce shortage, COVID-19, UAS and commercial space, FBO pricing transparency, growth of E-commerce, fuel availability, PFAS, Rebuild Illinois Bill, and runway conditions.
- Using data provided by airports, as well as various FAA sources, airports were evaluated based on the PMs, PIs, FSOs, and Systemwide Minimums established early in the IASP process. For PMs only, future performance targets were established which resulted in project recommendations.
- Cost estimates were developed based on the needs identified through the future targets process.

2. Future System Performance

Zach DeVeau presented an overview of future system performance and how the results of the analysis feed into recommendations and cost estimates.

3. Aviation Activity Forecasts

Tom Gibson presented aviation activity forecasts in Illinois and noted that the results of the forecasts will NOT be used to justify future funding at individual airports. Rather, they will be used by IDOT for informational purposes only. Tom also mentioned that the forecasting process is usually initiated earlier in the system plan process but due to COVID and uncertainty of the aviation industry, they were directed to delay the process. The following summarizes each forecast:

- Based Aircraft
    - **Methodologies**: Population, Per Capita Personal Income (PCPI), Populations/PCPI blend, FAA Aerospace Forecast – National GA Hours Flown, Terminal Area Forecast (TAF)
        - Socioeconomic data was obtained from Woods and Poole Economics Inc.
    - **Preferred Methodology:** Population/PCPI blend
    - **Base year based aircraft source:** Basedaircraft.com for nonprimary airports, airport-reported for primary and non-NPIAS airports
    - Statewide based aircraft are projected to grow 19%, or to 4,400 by 2039
- General aviation Operations
    - **Methodologies**: Population, PCPI, Population/PCPI blend, FAA Aerospace Forecast – National GA Hours Flown, TAF
        - Socioeconomic data was obtained from Woods and Poole Economics Inc.
    - **Preferred Methodology:** FAA Aerospace Forecast – National GA Hours Flown
    - **Base year GA operations source:** 2019 TAF for NPIAS airports, airport reported for non-NPIAS airports
    - Statewide GA operations are projected to grow 16%, or to 2,227,300 by 2039
- Commercial service operations
    - **Methodologies**: Population, PCPI, Population/PCPI blend, FAA Aerospace Forecast – Mainline v. Regional Carriers, TAF

  - Socioeconomic data was obtained from Woods and Poole Economics Inc.
- **Preferred Methodology:** 2019 TAF
- **Base year commercial service operations source:** 2019 TAF
- Statewide commercial service operations are projected to grow 22%, or to 1,463,000 by 2039

- Enplanements

  - **Methodologies**: Population, PCPI, Population/PCPI blend, TAF
    - Socioeconomic data was obtained from Woods and Poole Economics Inc.
  - **Preferred Methodology:** 2019 TAF
  - **Base year enplanements source:** 2019 TAF
  - Statewide enplanements are projected to grow 49%, or to 77,838,700 by 2039
    - Since a large portion of enplanements are associated with ORD and MDW, Tom asked the Chicago Department of Aviation (CDA) staff on the call if these projections generally aligned with theirs. CDA noted that they align.

Tom emphasized that the FAA review process is still on-going, so forecasts are subject to change.

4. Cost Estimates

Tom presented the cost estimates which derived from the gaps/deficiencies identified through the future performance target process. Hanson and CMT assisted in the development of cost estimates which resulted in a 20-year need of $11.1 B (including ORD and MDW) and $878.6 Million (excluding ORD and MDW). Tom also mentioned that the EIA documented that Illinois airports contribute $95.5 billion to the state's economy which is significantly higher than the annualized need of approximately $550 million.

5. IASP Future Considerations

Zach presented the project team's initial thoughts on IASP future considerations which included both policy and follow-on studies. Future considerations, including what was heard from the TAC, include:

- Follow-On Study Considerations

  - Airport Pavement Management System
  - GA 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
  - State Aviation System Plan Update
  - Statewide Airport and Aircraft Electrification Study *(TAC recommendation)*
  - Statewide Air Cargo/Freight Study *(TAC recommendation)*

- Policy Considerations

  - Dedicated Aviation Funding
  - Environmental Justice
  - IDOT Aeronautics Staffing

- Web-Based Management Programs
- Importance of Air Cargo / Freight *(TAC recommendation)*

6. Deliverables

Zach DeVeau highlighted the various deliverables associated with both the IASP and EIA. The deliverables presented, along with notes associated with each, are listed below.

- Full IASP Technical Report – in progress, 8 of 10 chapter drafted and available on the project website
- Case Studies – various short, informational brochures that detail the activities at Illinois' airports. These are all available on the project website
- IASP Executive Summary – summarizes each section of the IASP Technical Report. Currently under internal review, not currently available on the project website
- IASP & EIA Project Summary Poster – 24"x36" poster that highlights the main takeaways from both the IASP and EIA. Currently under internal review, not currently available on the project website
- EIA Full Technical Report – Full draft is available on the project website
- EIA Executive Summary - summarizes each section of the EIA Technical Report. Final draft is available on the project website
- EIA Individual Airport Brochures & PowerPoints – 2-page brochures developed for each airport that documents statewide, regional, and individual airport economic impact. A PowerPoint presentation prepared for each airport that can be used to communicate results with government officials and media. All are available on the project website
- Audience-Specific Primers – 4-page brochures with information from the IASP and EIA targeting different groups such as elected officials and policy makers, the general public, IDOT and FAA staff, and Illinois airport representatives

7. Next Steps

Zach closed out the discussion by providing an overview of the remaining tasks. Those include finalizing the forecasts and receiving FAA approval, finalizing the future aviation alternatives and recommendations and sending to the TAC for review, sending the Executive Summary and Project Poster to the TAC for review, as well as finalizing the Primers and sending to the TAC for review.