

ILLINOIS AIRPORT REPRESENTATIVES



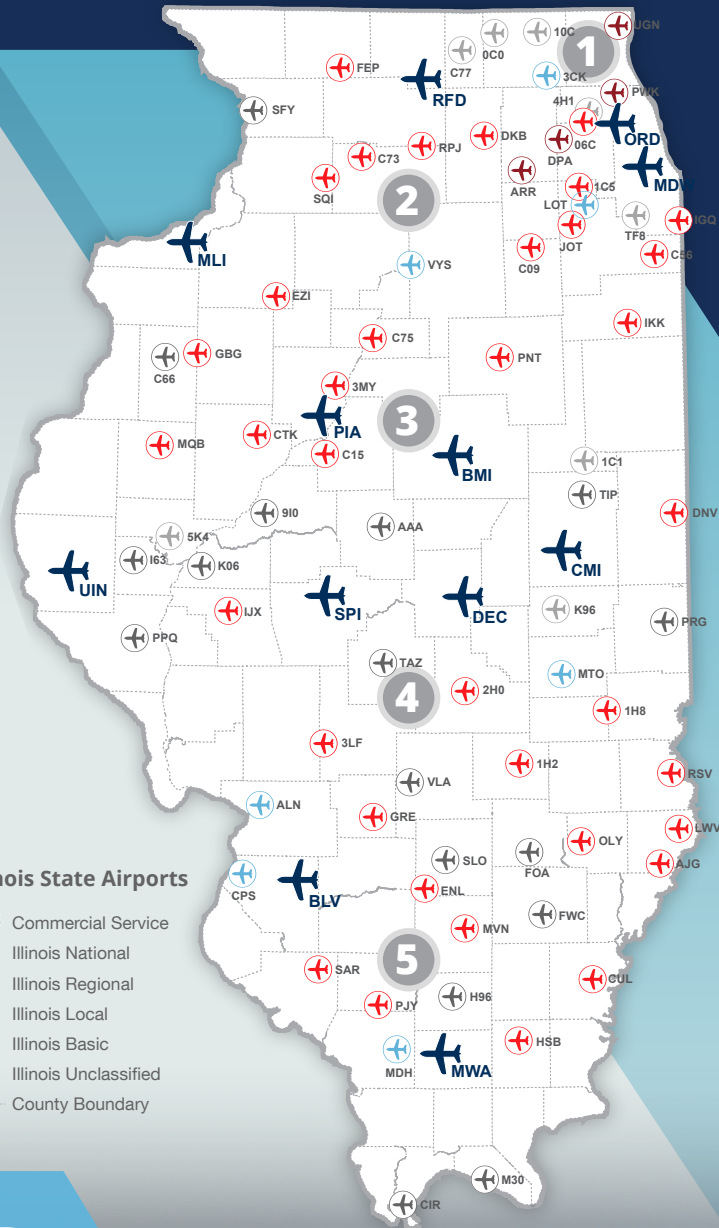
A PRIMER FOR THE FRONTLINE OF ILLINOIS' AVIATION SYSTEM

ILLINOIS AVIATION IS ALL IN

Illinois' aviation system is a vital resource to the state's economy. Illinois airports provide an entry into the state economic system, providing passenger and freight/cargo services, as well as providing numerous employment opportunities. Illinois' aviation system in Illinois connects the state to national and international communities and economies far beyond its midwestern borders. Simply put, Illinois Aviation is All In.

Proper long-range planning is essential to the success and viability of Illinois, including the state's aviation system, which boasts public-use, public-owned 85 airports, including some of the busiest facilities on the globe. The Illinois Department of Transportation (IDOT) initiated the Illinois Aviation System Plan (IASP) and associated Economic Impact Analysis (EIA) to examine current aviation system needs and to provide justification for continued development of Illinois' aviation system.

This primer provides an overview of the IASP and companion EIA by providing select findings of these two studies that are of most interest to airport representatives, including the economic impact of the system, existing and future system performance, systemwide cost estimates, policy considerations, and aviation opportunities.



85

Airports included in the Illinois Aviation System

12 & 73

Commercial Service

General Aviation



Expect More. Experience Better.

ECONOMIC IMPACT: INVESTING IN ILLINOIS' SUCCESS

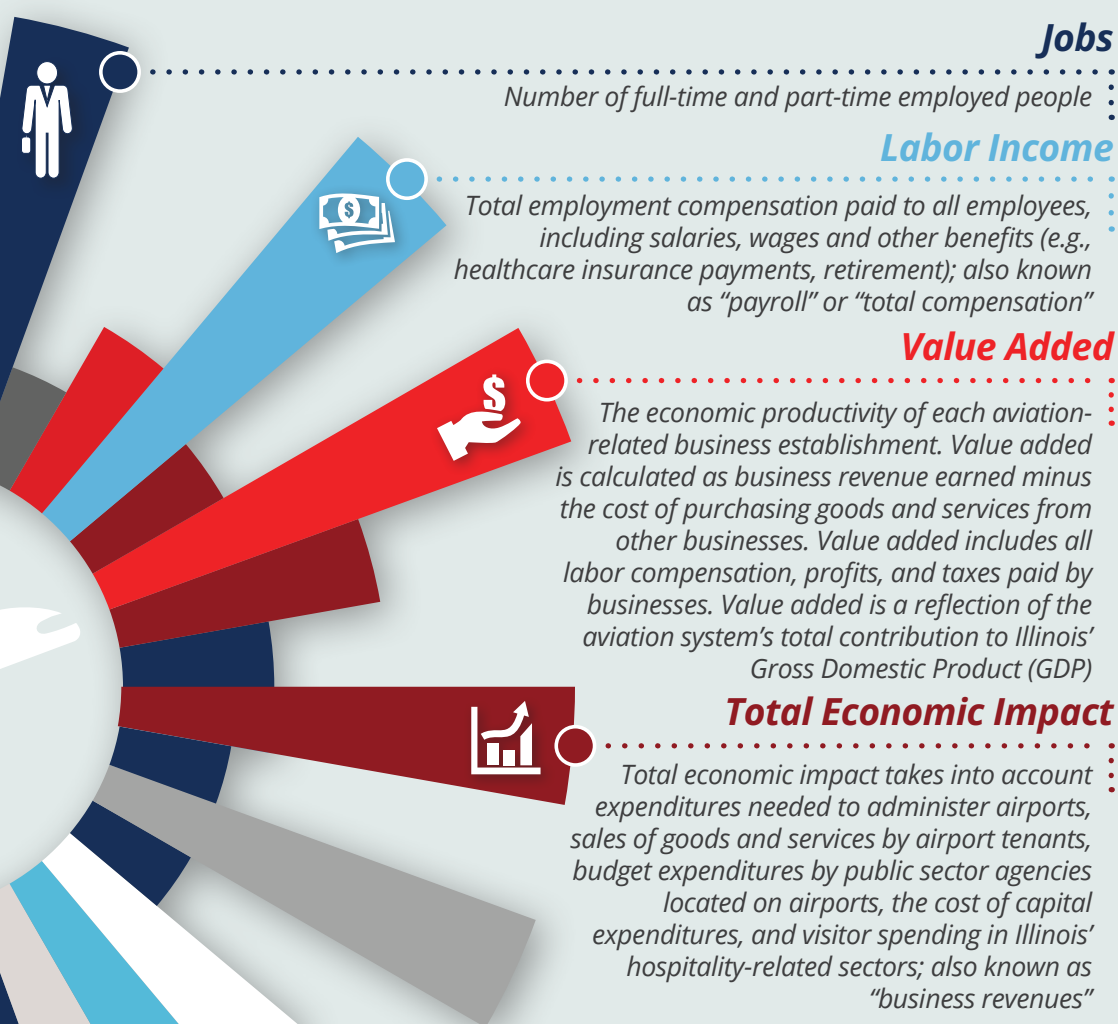
To understand how Illinois' aviation system supports the economy, IDOT undertook the Aviation Economic Impact Analysis. Data for this study were collected for calendar year 2019 and represent a snapshot in time for that year. The total economic impact of \$95.5 billion is how much airports contributed to the state's economy in 2019 alone.

\$95.5 | **BILLION IN ECONOMIC IMPACT**
 * includes off-airport air cargo impact

ILLINOIS STATEWIDE AVIATION BENEFITS

The statewide economic impact of Illinois' aviation consists of three major categories: On-Airport Impacts, Visitor Spending Impacts, and Freight/Cargo Impacts. Together, they account for \$95.5 billion in economic impact for Illinois. EIA analysis also calculated that Illinois airports support close to 500,000 jobs, over \$32 million in labor income and close to \$54 billion in value added, as highlighted below.

WHAT IS ECONOMIC IMPACT?



\$38.4 BILLION

On-Airport



\$21.2 BILLION

Visitor Spending



\$35.9 BILLION

Freight/Cargo



Jobs

492,768



Labor Income

\$32.6 BILLION



Value Added

\$53.8 BILLION



Total Economic Impact

\$95.5 BILLION

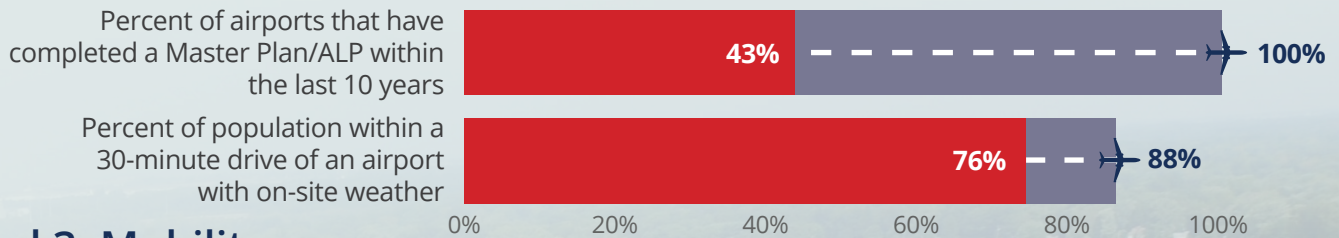
EXISTING AND FUTURE SYSTEM PERFORMANCE

IASP goals were developed to shape the future of Illinois' aviation system and to assess performance in achieving that vision. To identify future needs, the IASP also established future performance targets for various Performance Measures (PMs). Future performance targets are defined as the total and percent of airports by classification that need to meet each PM in order to accomplish the overarching goals of the IASP. The difference between existing system performance and future system performance is important for defining system investment needs and recommendations to ensure that the system continues to meet current demands and is poised to meet future demands. Examples of two goals' existing and future system performance are provided

■ Existing system performance
 ✈ Future system performance

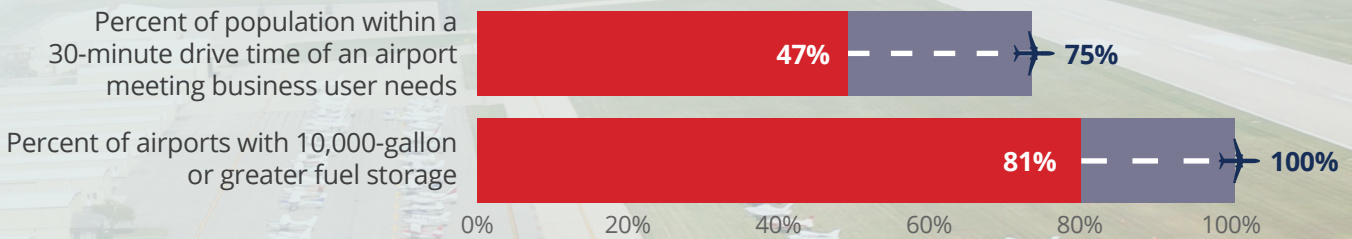
Goal 1: Economy

Improve Illinois' economy by providing transportation infrastructure that supports the efficient movement of people and goods.



Goal 3: Mobility

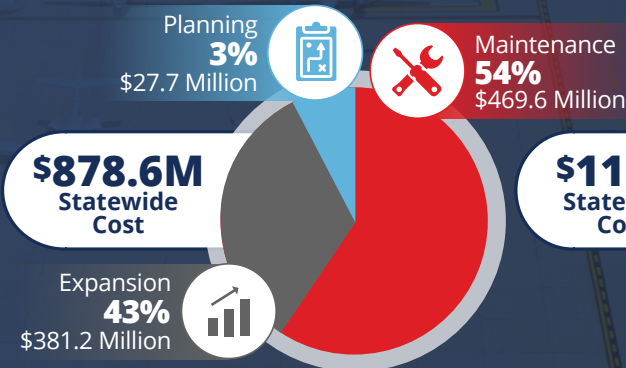
Support all modes of transportation to improve accessibility and safety by improving connections.



SYSTEMWIDE COST ESTIMATES

Systemwide cost estimates are based on IASP performance measures (PMs), facility and service objectives (FSOs), and systemwide minimums. Projects were developed based on airports with identified deficiencies. These projects are needed to continue to meet current and future system performance goals and objectives. Systemwide, there is an estimated \$11.1 billion in needed planning, maintenance, and expansion projects. Planning projects are those needed to develop planning documents and procedures at current system airports. Maintenance projects are those needed to maintain the existing aviation system. Expansion projects are those needed for new infrastructure or new program projects at current system airports.

Project Cost Estimate by Project Type excluding O'Hare and Midway



Project Cost Estimate by Project Type including O'Hare and Midway



■ Expansion ■ Maintenance ■ Planning

POLICY AND FOLLOW-ON STUDY CONSIDERATIONS

Various follow-on studies and policies were considered for future implementation to provide direction to IDOT Aeronautics for preserving and enhancing Illinois' aviation system. These considerations address identified system inadequacies, as well as provide support to the current aviation system, through funding and procedural mechanisms at the state and IDOT office level. The policy considerations identified as part of the IASP provide a framework for maintenance and future growth. These considerations are based on current IDOT policies, as well as on current peer state policies and procedures. These considerations are also in response to the aviation issues identified in the IASP that have high potential to impact the state's aviation system over the 20-year planning horizon. To name a few, policy considerations included dedicated aviation funding and IDOT Aeronautics staffing. Additionally, some follow-on studies include statewide aircraft electrification and air cargo studies.

- ✓ Dedicated Aviation Funding
- ✓ Increased IDOT Aeronautics Staffing
- ✓ Statewide Aircraft Electrification Study
- ✓ Statewide Air Cargo Study

AVIATION OPPORTUNITIES IN ILLINOIS

The aviation industry is constantly evolving to keep pace with advances in technology; economic conditions; local, state, and federal regulatory requirements; traveler behavior trends; and other factors inherent to and external from the airport environment. Within this context, airports and sponsors are responsible for maintaining safe and secure aviation facilities that meet user demands. Fiscal resources are often constrained and can vary year-to-year based on how policymakers allocate and prioritize available dollars. Understanding the key issues facing Illinois' airport system—both today and expected in the years ahead—is a critical task when assessing the system's current and anticipated future demands. Key considerations include:



AGING INFRASTRUCTURE

Infrastructure exceeding its useful life or with deferred maintenance needs can affect airports' operational efficiency and ultimately cost more when major reconstruction or replacement become warranted. Poorly maintained or outdated infrastructure may result in some passengers and pilots choosing to use alternative airports.



AVIATION WORKFORCE SHORTAGE

Demand for commercial service and some sectors of GA continues to rise, yet the number of aviation professionals is on the decline. The aviation workforce shortage applies not only to pilots, but also mechanics, flight instructors, and other industry staff.



FUEL AVAILABILITY

Airports that offer fuel are more attractive to aircraft owners/pilots when choosing where to base their aircraft. Pilots often make decisions on where to fly based on the cost of fuel. Fuel sales provide an important revenue source and can be a factor in where aviation-related businesses locate.