



MISSOURI STATE AIRPORT SYSTEM PLAN UPDATE



MODOT STATE AIRPORT SYSTEM PLAN

Forecasts Summary





Factors Considered in Forecast Development

- Historical and current aviation activity in Missouri
- Industry trends and issues that may impact future aviation growth
- Socioeconomic trends that may impact future aviation growth
- Forecast horizons: 2022, 2027, and 2037
- Forecasts developed for
 - Based Aircraft
 - General Aviation Aircraft Operations



Anticipated Trends that Will Influence General Aviation Activity

- ↑ Increased flying to support business needs
- ↓ Recent increases in the cost of aviation fuel
- ↑ Growing number of large general aviation business jets (over 50,000 lbs MTOW)
- ↓ Declining numbers and use of single-engine planes for recreational flying
- ↑ Increases in on-demand charter service



Missouri's Characteristics that May Influence Aviation Demand

Home to 10 Fortune 500 companies

The top industries (manufacturing, health care, financial and professional services, agriculture, and bioscience) rely on aviation support

Missouri's central location makes it strategic for air access

The state offers numerous incentives and workforce training programs

Projected population and employment growth have the propensity to influence future aviation demand



Four Scenarios Were Considered to Project Based Aircraft – Preferred Scenario 1

MISSOURI BASED AIRCRAFT FORECAST SCENARIOS					
Scenarios	2017 Actual	2022	2027	2037	CAGR 2017-37
Scenario 1: Historical Growth/FAA Growth	3,233	3,306	3,382	3,542	0.46%
Scenario 2: Employment Growth/FAA Growth	3,233	3,312	3,393	3,567	0.49%
Scenario 3: Socioeconomic-County Population	3,233	3,324	3,420	3,627	0.58%
Scenario 4: Market Share- TAF Growth	3,233	3,284	3,336	3,442	0.31%



Factors that Influence Annual General Aviation Operations

- Total based aircraft
- Airport facilities and services such as a control tower, approach, fuel, and FBO
- Airport location
- Activity and facilities at neighboring or competing airports
- Area demographics, including business density and types
- National aviation trends



Four Scenarios Considered to Forecast Annual General Aviation Operations – Scenario 3

MISSOURI GENERAL AVIATION OPERATIONS FORECAST SCENARIOS – SCENARIO 3 PREFERRED FORECAST

Scenarios	2017 Actual	2022	2027	2037	CAGR 2017-37
Scenario 1: OPBA	1,047,196	1,070,300	1,094,700	1,146,000	0.45%
Scenario 2: Employment Growth	1,047,196	1,097,000	1,150,600	1,267,500	0.96%
Scenario 3: Jet Operations/FAA Growth	1,047,196	1,077,500	1,110,200	1,180,400	0.60%
Scenario 4: Market Share Towered Ops	1,047,196	1,061,500	1,077,000	1,108,800	0.29%



Summary of System Plan Demand Projections

