

NEWSLETTER

Colorado Aviation System Plan (CASP) | Colorado Economic Impact Study (CEIS)



Colorado Aviation System Plan and Economic Impact Study

What is the Colorado Aviation System Plan and Economic Impact Study? What is the Purpose?

The Colorado Aviation System Plan (CASP) evaluates the overall conditions, existing and future performance, and financial needs of Colorado’s public-use airports. While there are 74 of these in the system, the CASP focused on 66, most of which are publicly owned. The plan’s purpose is to determine the airport system’s abilities to meet current and forecasted future aviation demand. The CASP aids the Colorado Department of Transportation (CDOT) Division of Aeronautics in planning and developing the state’s aviation system. The Colorado Aviation Economic Impact Study (CEIS) assesses the on-airport, off-airport, and other multiplier economic impacts of the 66 CASP airports plus four privately-owned, public-use airports in the state. The CEIS analyzes the individual and statewide impacts with an emphasis on the qualitative contributions that aviation provides to Colorado residents, businesses, and the economy.

Project Progress

CASP: The project team has completed drafts of all 10 Technical Report chapters. These chapters are available on the project website. The project team is currently completing final deliverables including CASP Technical Report, Executive Summary, and Real Life Stories brochures. Of specific note, given the ongoing pandemic, a Postscript analysis of the impacts to airports resulting from COVID-19 is being prepared to append to the report which is scheduled for completion in July.

CEIS: The project team has completed a series of Tech Memos and has compiled these into a CEIS Technical Report. Tech Memos 1-5 are available on the project website and the complete CEIS Technical Report was released with CDOT’s Mountain Wave following the June 10th CAB meeting and posted to the website. The project team also completed CEIS deliverables including the CEIS Executive Summary and Individual Airport Reports.

Highlights From Chapter 8. Future Performance

The future system performance builds upon the findings of both the existing system analysis and the forecasts of demand (Chapter 6. Existing System Performance and Chapter 7. Aviation Demand Forecasts). The analysis reveals the implications of future aviation demand on certain elements of the system’s needs that are most affected by changes in based aircraft and operations. This chapter introduces the desired performance targets for the future system in terms of performance measures (PMs) as established in Chapter 1. Study Design and Goals.

Arranged by goal category, the PMs and future performance targets are outlined below. Targets have been established for most airport classifications, however, there is a PM where there was no target established.

These future targets were used to identify actions that could be taken to achieve increased system performance.

Performance Measures (PM)		2018 System Performance	Future Performance Target
Safety and Efficiency			
Percent of Airports with Approaches Negatively Impacted by Obstructions		35%	0%
Percent of Airports That Have Full Perimeter Wildlife Fencing		49%	85%
Percent of Airports that have Adopted Appropriate Land Use Controls	Adopted Appropriate Land Use Controls	62%	100%
	Adopted Appropriate Height Controls	58%	100%
Percent of NPIAS Airports that Meet Current FAA Design Standards Under AC 150/5300-13A	Meets Taxiway Design Standards	10%	100%
	Meets RSA Design Standards	78%	100%



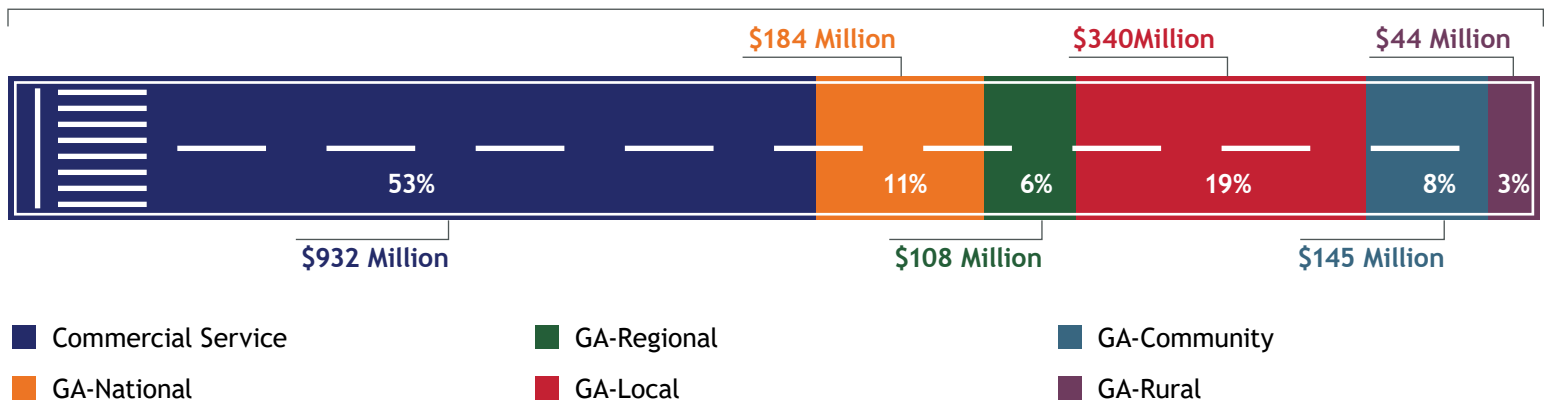
Performance Measures (PM)	2018 System Performance	Future Performance Target
Access and Mobility		
Percent of Airports with a Dedicated Snow Removal Equipment (SRE) Building	35%	61%
Percent of Population Within a 30-Minute Drive Time of an All-Weather Runway	83%	85%
Percent of Airports with Adequate Terminal Capacity	Commercial Service Terminal Capacity	29%
	General Aviation Terminal Capacity	58%
Percent of Airports with Adequate Transient Hangar Spaces	24%	61%
Economic Sustainability		
Percent of Airports with the Necessary Fuel Type, Available 24/7	94%	100%
Percent of Airports that Support the Aerospace Manufacturing, Technology, and/or Testing Industry	36%	No Target Established
Percent of Airports with Adequate Utilities	53%	85%
System Viability		
Percent of Airports with Certified On-Site Weather Reporting (AWOS or ASOS)	77%	85%
Percent of Airports with Pavement Maintenance Programs	64%	95%
Percent of Airports with an Average Runway and Taxiway Pavement Condition Index (PCI) of 70 or Greater	47%	95%

Highlights from Chapter 10. System Needs and Recommendations

The financial needs presented in the CASP represent the development costs of recommended projects that would improve the system to the desired level. Projects and their associated costs identified in the 2020 CASP are an important outcome as they provide a complete picture of the financial resources needed to maintain and improve the system. Financial needs were developed utilizing existing and future system performance results. The total financial development needs of the Colorado airport system exceeds \$9.1 billion. The total system project costs by airport classification, excluding DEN’s capital improvement plan (CIP) which has an additional \$1.8 billion in needs, is depicted below.

Total System Project Costs by Airport Classification Excluding DEN CIP Costs

Total: \$9.18 Billion



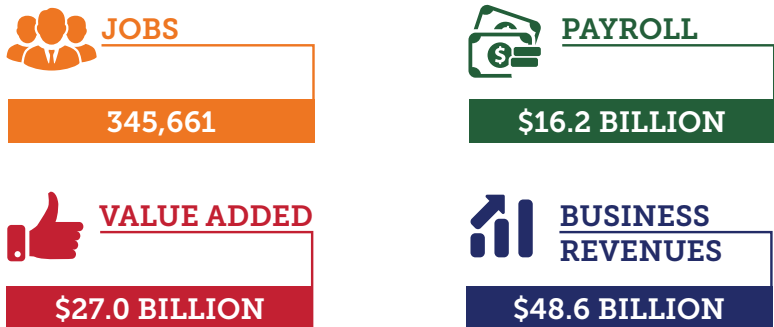
In addition to identifying financial needs associated with projects at individual airports, the CASP also identified a series of policy and investigation recommendations that would improve performance of the state airport system. The CASP recommends CDOT Division of Aeronautics undertake the following:

- Snow Removal Equipment (SRE) Building Program
- GA Terminal Building Program
- Denver Regional Demand/Capacity Study
- Approach Surface Obstruction Study



Highlights from CEIS

The CEIS quantified the economic contributions of individual airports and aviation in the state and highlighted the benefits airports provide in Colorado. Total impacts were communicated using four separate economic measures: Jobs, Payroll, and Business Revenues (previously named Output) were adopted from the 2013 study while Value Added was newly introduced to quantify aviation's contributions to Colorado's Gross State Product. Preliminary findings were revealed at the 2020 Colorado Airport Operators Association (CAOA) Winter Conference, while the final summary of impacts will be published in the CEIS Technical Report. The total economic impacts of aviation in Colorado are summarized below.



CASP/CEIS Deliverables

The final findings of the CASP and CEIS will be communicated through a series of deliverables that will be published upon completion. These documents will be available on the [project website](#).

Deliverables include:

- **CASP and CEIS Technical Reports** that combine the chapters and tech memos from each project into comprehensive documents.
- **CASP and CEIS Executive Summaries** that provide an overview of findings and recommendations focused on non-technical audiences.
- **Individual Airport Reports** that present each airport's projected financial needs as well as the total economic impact for use in local and regional communications.
- **Real Life Stories Brochures** that highlight unique aspects of aviation in Colorado and illustrate the qualitative impacts of aviation.



COVID-19 Postscript Analysis

The CASP and CEIS were initiated in September 2018. Near the conclusion of the project, the novel coronavirus (COVID-19) pandemic occurred, resulting in significant impacts to aviation around the world and CDOT Division of Aeronautics wanted to ensure this was included prior to publication. An analysis of the impacts will identify and document the initial impacts of COVID-19 on Colorado's airports from financial to operational. While the impacts will last beyond the study's publication, this analysis provides timely insight that is valuable to CDOT Division of Aeronautics and the airports.

The COVID-19 Postscript Analysis Includes:

- Outreach to all 14 commercial service airports as well as five general aviation airports to quantify the impacts of COVID-19 on airport operations, passenger traffic, airport revenues, and capital improvement projects.
- Data from other sources including the Federal Aviation Administration (FAA), Transportation Security Administration (TSA), and airlines.
- High-level analysis of the potential effect of COVID-19 on statewide aviation economic impact using the CEIS Dynamic Calculator.

The completed postscript will be appended to the front of the CASP and CEIS Technical Reports to provide additional context for future readers.

Acknowledgements

The 2020 CASP and CEIS studies would not have been possible without meaningful collaboration and dedication from representatives of Colorado's aviation community. Each participant's time, efforts, and input will undoubtedly shape the future of the Centennial State's aviation system. The project team would like to extend a special thank you to:

Project Advisory Committee (PAC) Members

- Kathleen Collins, CDOT Statewide Planning
- Jeanette Hilaire, Denver International Airport
- Jason Licon, Colorado Airport Operators Association/Northern Colorado Regional Airport
- Kenneth Maenpa, Telluride Regional Airport, Colorado Aeronautical Board
- Chic Myers, Colorado Aeronautical Board
- John Sweeney, FAA Denver ADO

Colorado Aeronautical Board (CAB) Members

- Robert Orlislagers, Chair
- Kenneth Maenpa, Vice Chair
- Chic Myers, Secretary
- Ann Beardall
- Kent Holsinger
- Amy Miller
- Joe Rice

Colorado Department of Transportation (CDOT) Division of Aeronautics Team

- David Ulane, Director
- Scott Storie, Project Manager
- Todd Green
- Kaitlyn Westendorf
- Kip McClain
- Bryce Shuck
- Shahn Sederberg
- Tonya Hill

Contact

If you would like to reach out directly to the study team, please contact CDOT Division of Aeronautics or the consultant using the contact information provided:

CDOT Aeronautics Division Contact:

Scott Storie
CDOT Aeronautics Project Manager

📞 (303) 512-5250
✉️ Scott.storie@state.co.us

Consultant Team Contact:

Pam Keidel-Adams
Kimley-Horn Project Manager

📞 (480) 207-2670
✉️ Pam.Keidel-Adams@kimley-horn.com