



Northeast Arkansas Regional Airport Needs Assessment

November 15, 2023



Project Objective



- Study focused on analyzing the demand for an **expanded or new commercial service airport** in the Northeast Arkansas Region.
- Site selection and development programming are not part of this project but could be completed in **subsequent phases**.

Airport Development Process

NEEDS ASSESSMENT SCOPE

PHASE 1A:

**Analysis of Regional
Socioeconomic Factors
and Key Industries**



PHASE 1B:

**Analysis of
Air Service Demand**

POTENTIAL NEXT STEPS

PHASE 2:

**Proposed Airport
Facility
Requirements**



PHASE 3:

Site Selection



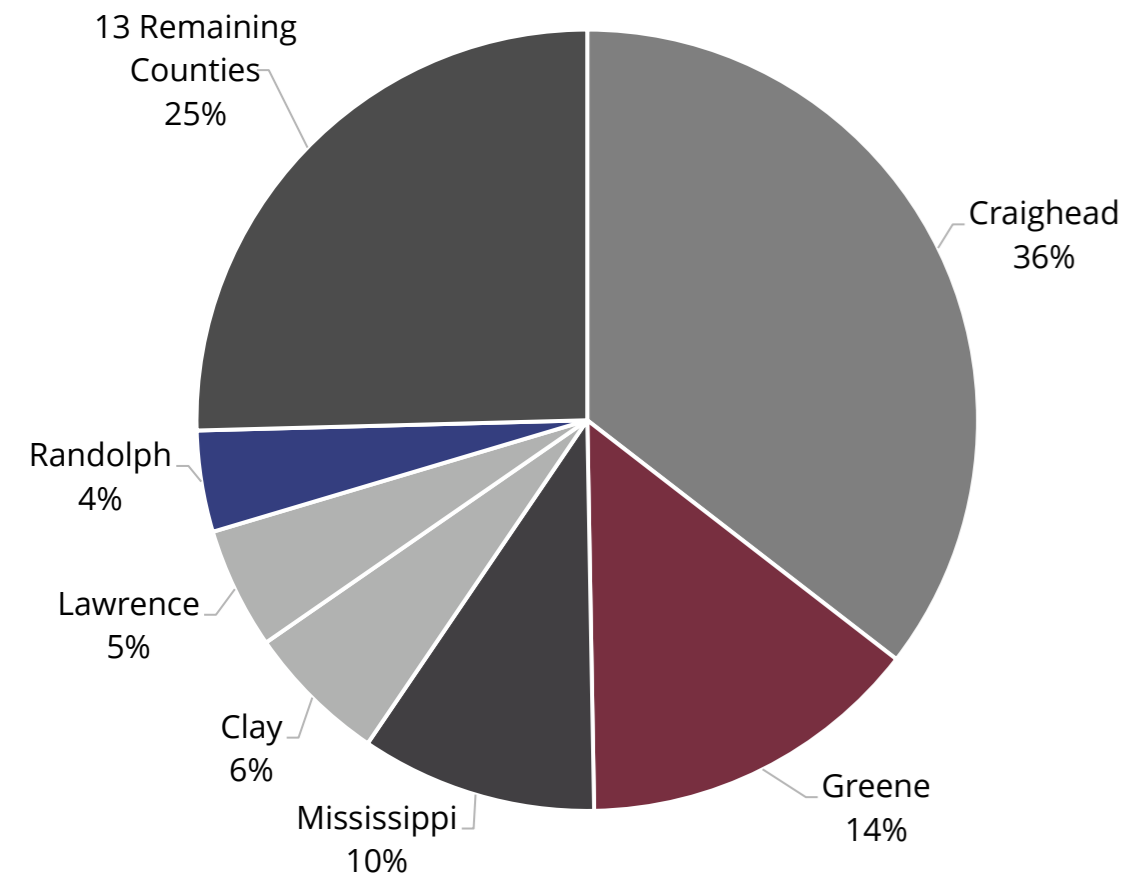
PHASE 4:

**Airport Master
Plan and
Development**

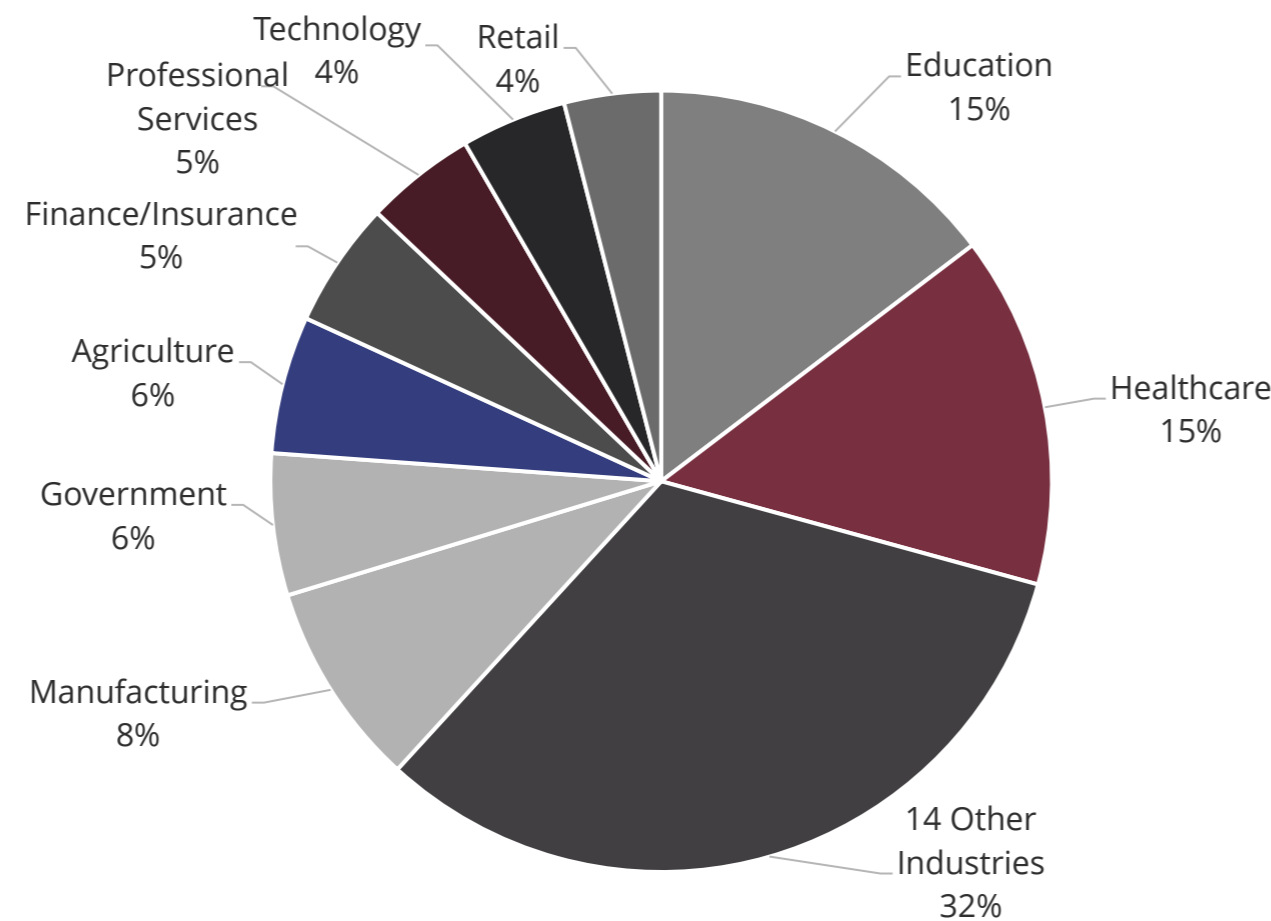


Survey Results

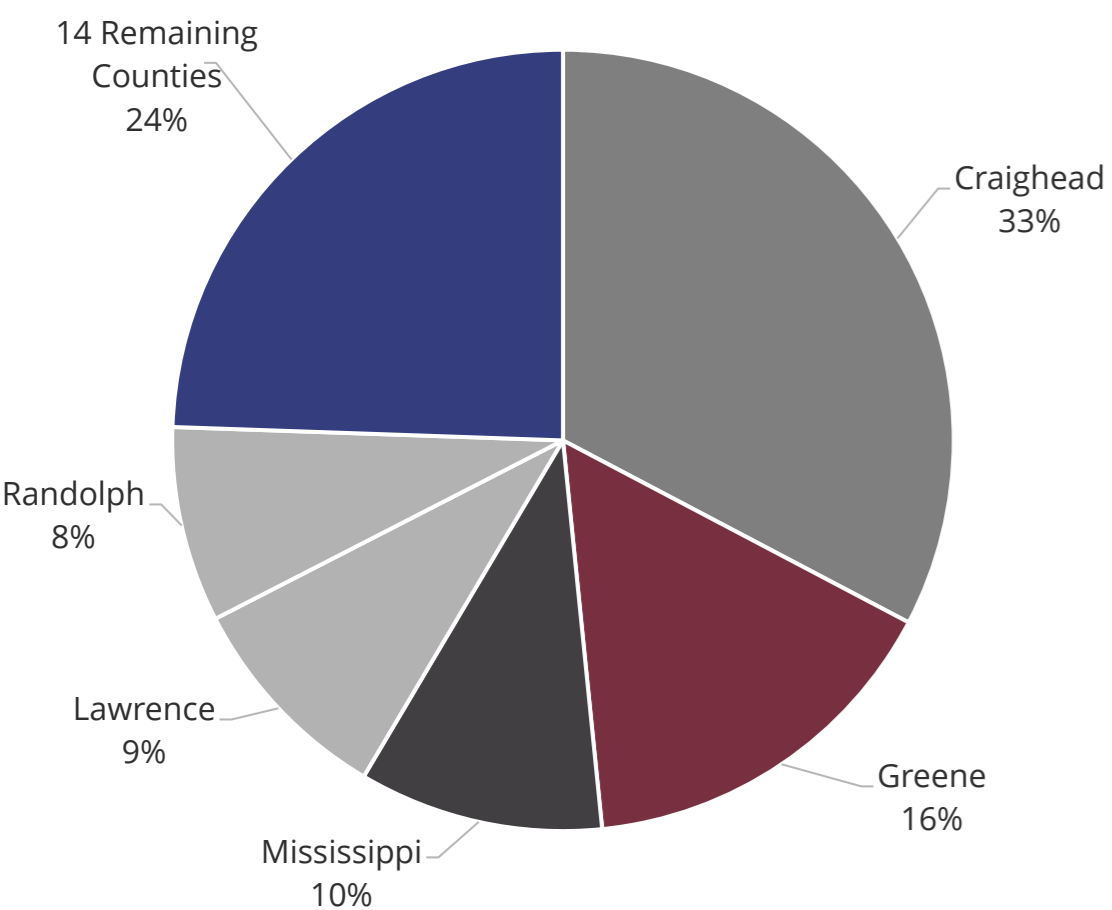
Counties Traveled To:



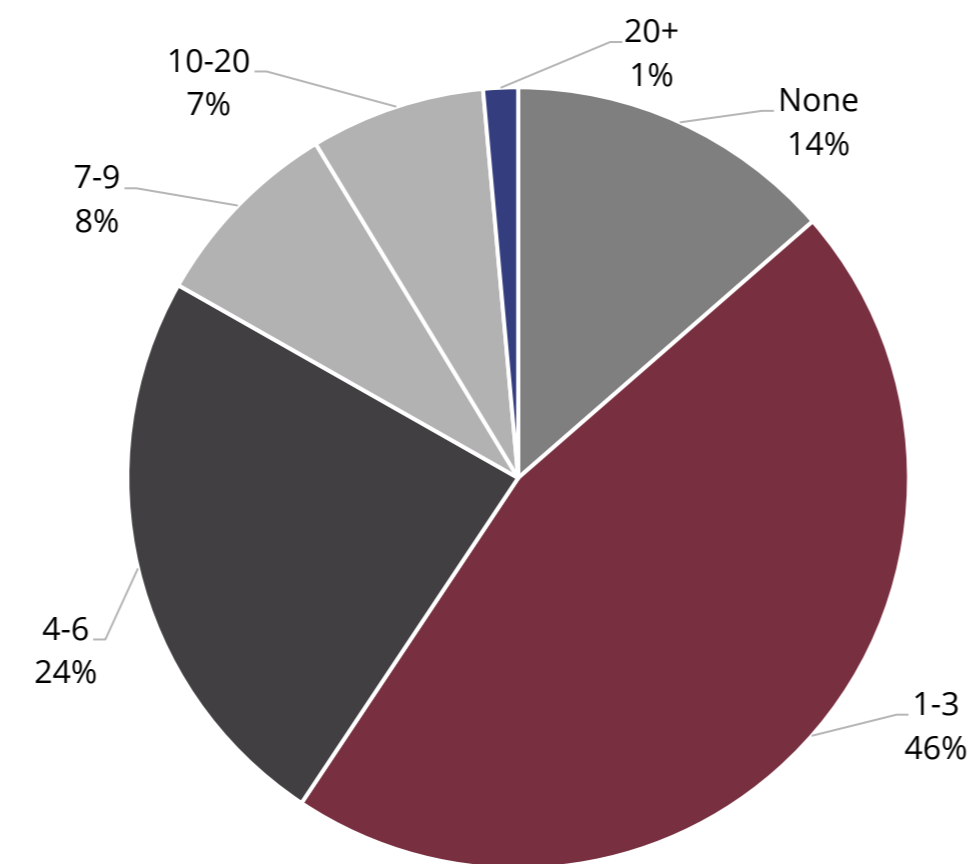
Industries Represented:



Businesses Located In:



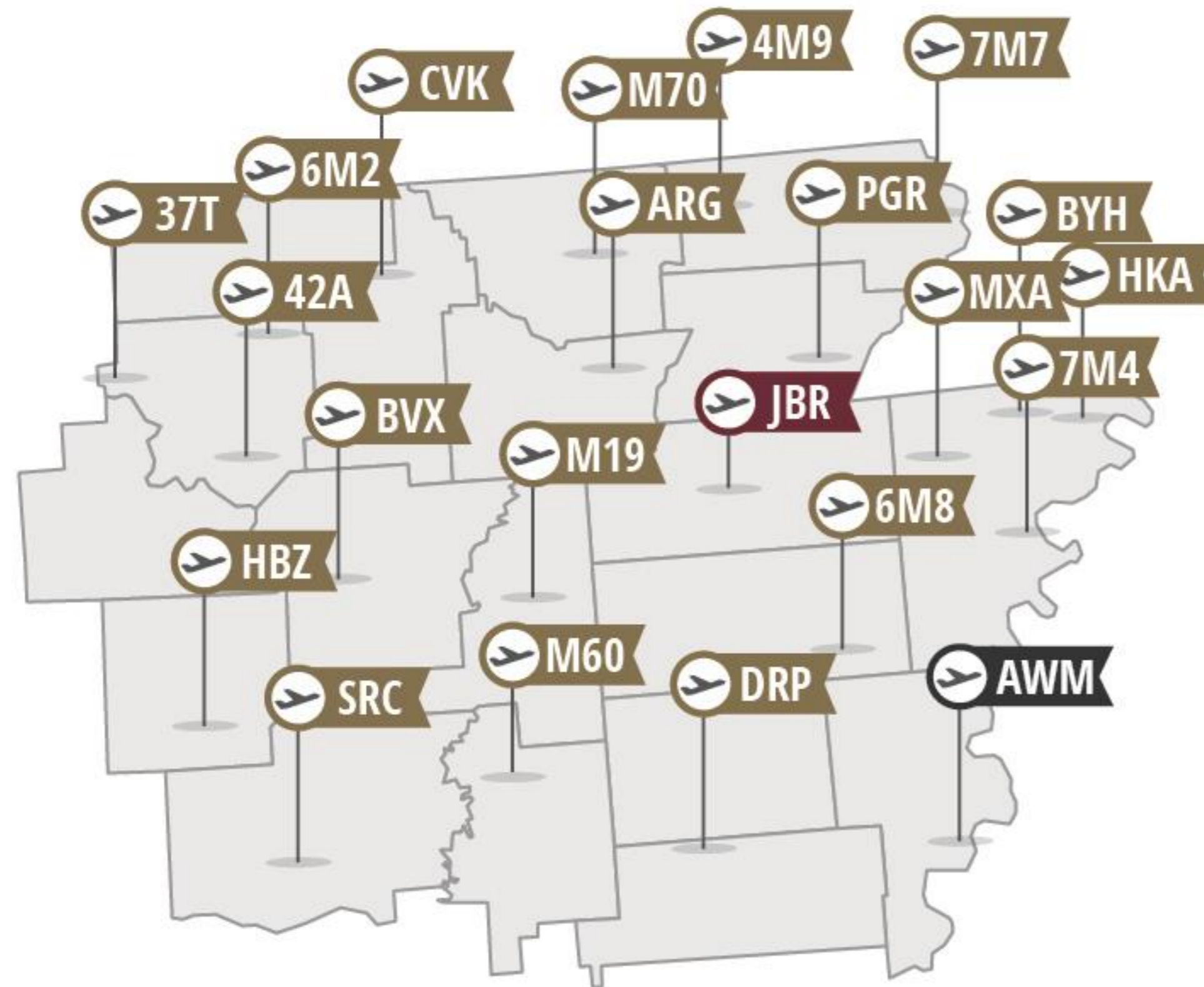
Trips Using Air Travel Per Year:



- Total of **9,026** responses received
 - 95% Individual
 - 5% Representing Businesses
- Air travel is utilized by **86%** of respondents
 - 40% of respondents took more than 3 trips using air travel annually
- Most common industries represented included **education** and **healthcare**
- Approximately 76% of respondents are within a **60-minute drive** of Jonesboro



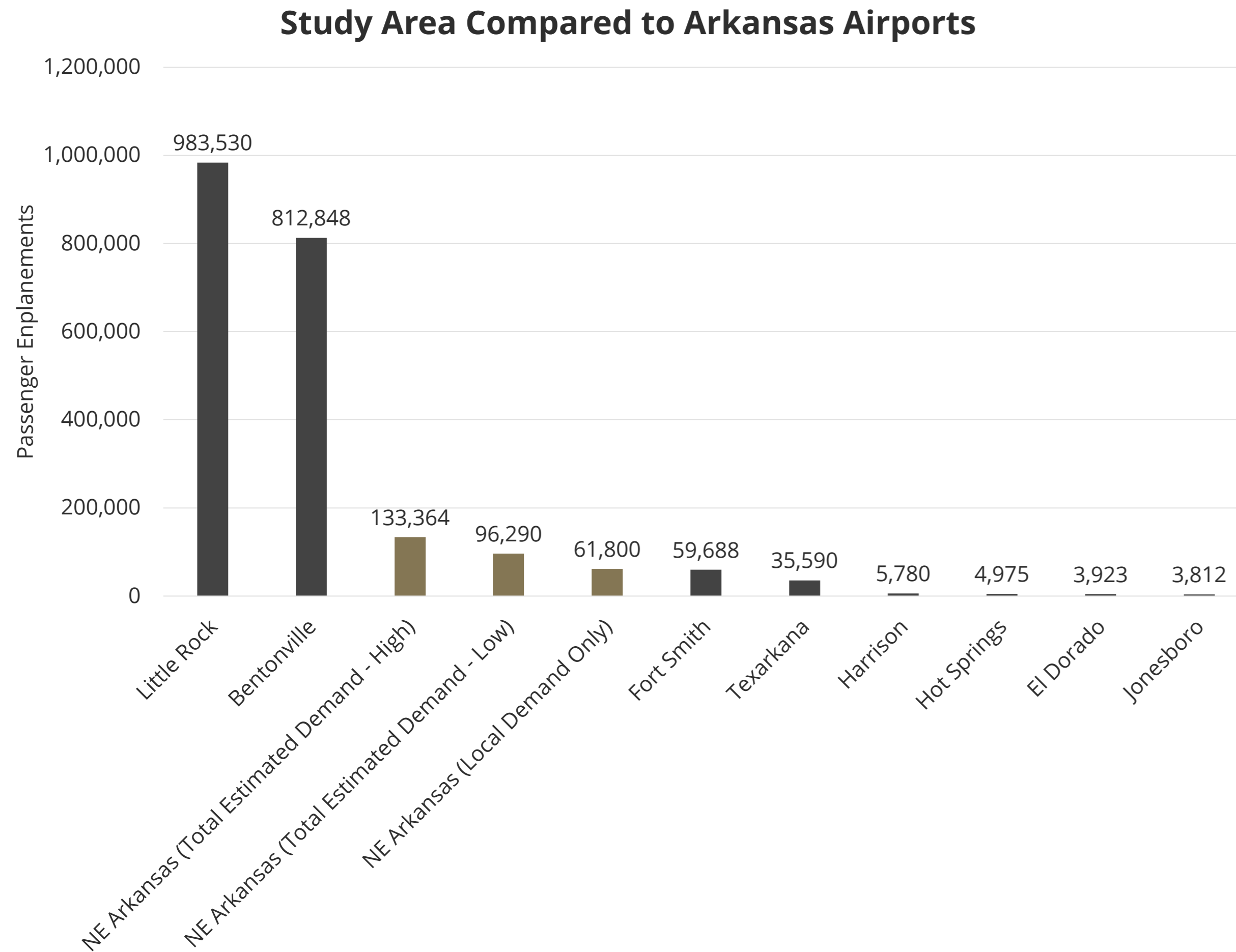
Other Socioeconomic Findings



- General Aviation
- Reliever
- Commercial

- Regional ArDOT plans **not likely to influence** demand for air travel
- Increase in site visits by **prospective corporations** to region noted by AEDC
- While regional key socioeconomic indicators trend lower than U.S. and Arkansas averages, **Craighead County** demonstrated growth
- Arkansas has a **low propensity for air travel** compared to national average
- Comments received were **mostly supportive or positive** towards new or expanded airport

ARC Data Results

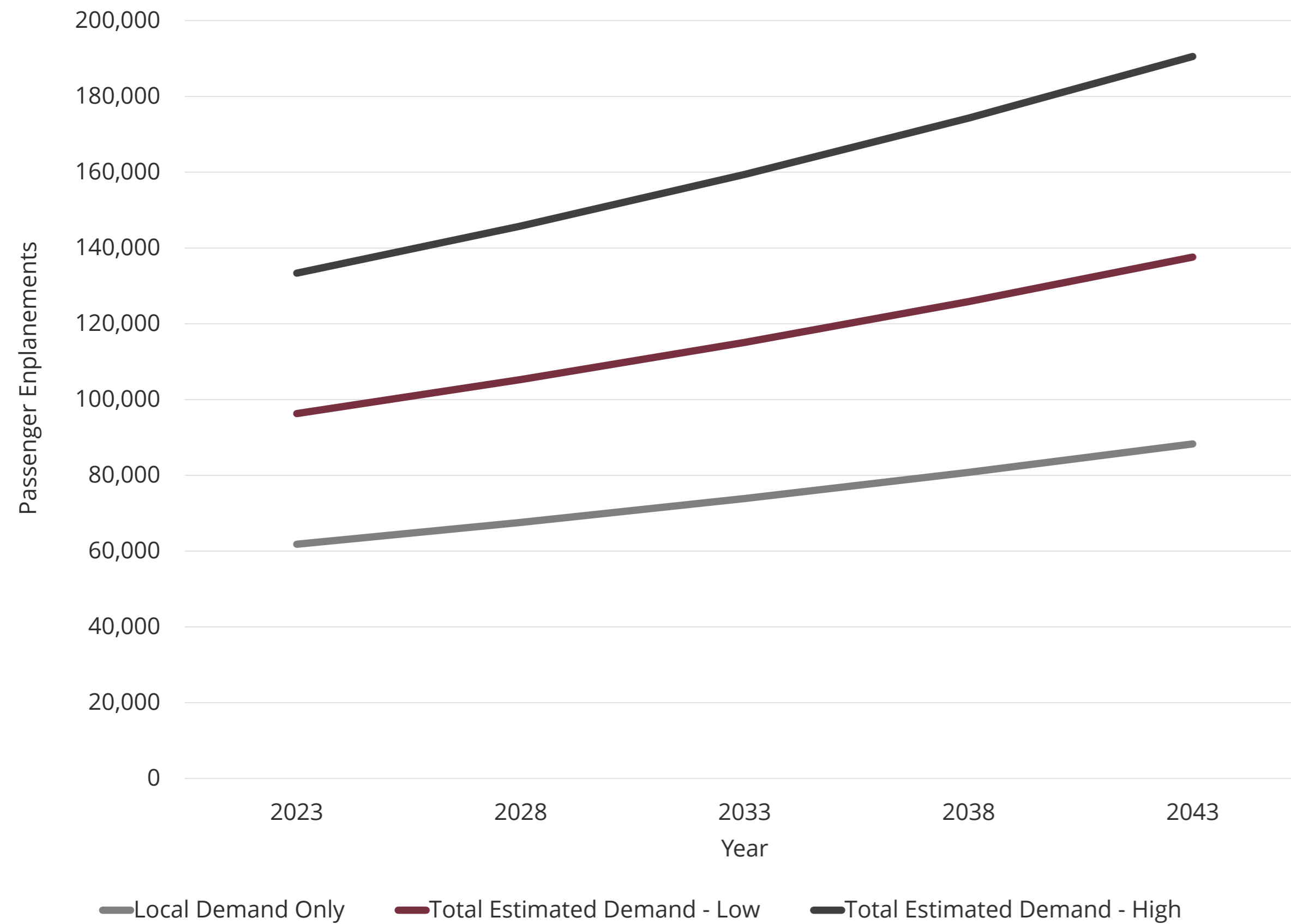


- ARC data pulls directly from **credit card purchase** records
- Study area produced an output of **61,800 enplanements**
- Total demand for study area estimated to range from **96,290 to 133,364 enplanements**
- 77.6% of Study Area passengers **drive out of state** for air travel needs
- Legacy carriers (AA, DL, and UA) constitute **86%** of local demand market share



Enplanement Forecasts

Forecasted Regional Enplanements



Year	Local Demand Only	Total Estimated Demand - Low	Total Estimated Demand - High
2023	61,800	96,290	133,364
2028	67,566	105,274	145,807
2033	73,870	115,096	159,410
2038	80,762	125,834	174,283
2043	88,297	137,574	190,544

- Growth based on 1.8% average annual growth rate for **per capita personal income**



Airline Perspectives



- Study area market share trends heavily towards **legacy carriers**
- Comparable markets to study area are generally served by **regional airlines** operating on behalf of legacy carriers
- Comparable markets have recently been faced with **reduced service** due to challenges associated with:
 1. Regional aircraft fleet
 2. Shortage of qualified pilots
- Socioeconomics of region may **not entice interest** by legacy carriers



Next Steps



- Initial findings were **presented to ADA and FAA**
- ADA would elect to move forward with Phase 2 – **Airport Facility Requirements Study**
- **Scope of work** may include:
 1. Identifying current constraints affecting regional leakage
 2. Identification of airside, landside, and terminal needs
 3. Emergent aviation technology impacts
 4. Planning-level cost estimates
 5. Detailing metrics for development thresholds / case analysis
 6. Will not include site selection

Questions?

