2026 Arizona State Aviation System Plan (SASP)









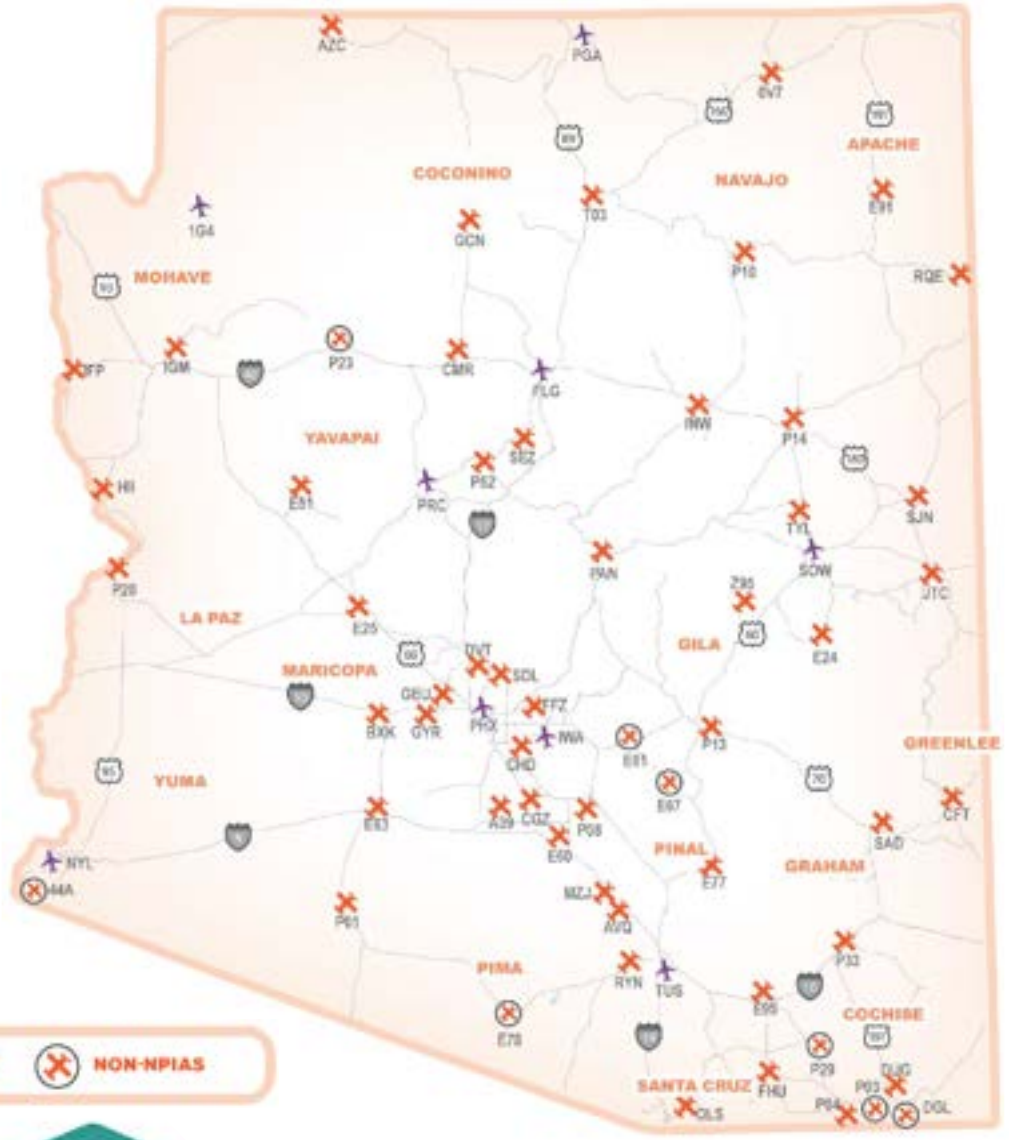
Matthew Munden, Aeronautics Group Manager

ARIZONA DEPARTMENT OF TRANSPORTATION

2026 Arizona State Aviation System Plan

Arizona's Airport System

- Includes 67 publicly owned, public-use airports
  - Publicly owned: owned by a county, municipality, or other subdivision of the State
  - Public-use: open for use by civilian aircraft
- 59 facilities included in the FAA's National Plan of Integrated Airport Systems (NPIAS)
- 8 additional publicly owned non-NPIAS airports



2026 Arizona State Aviation System Plan

2026 SASP Public Engagement

Project Advisory Committee

- Attended meetings, reviewed documents, provided feedback throughout project

Arizona Airports Association (AzAA)

- Updates were given at spring and fall conferences, allowing airports to ask questions and offer feedback

Public Survey Period

- Members of the public could provide input about completed SASP documents

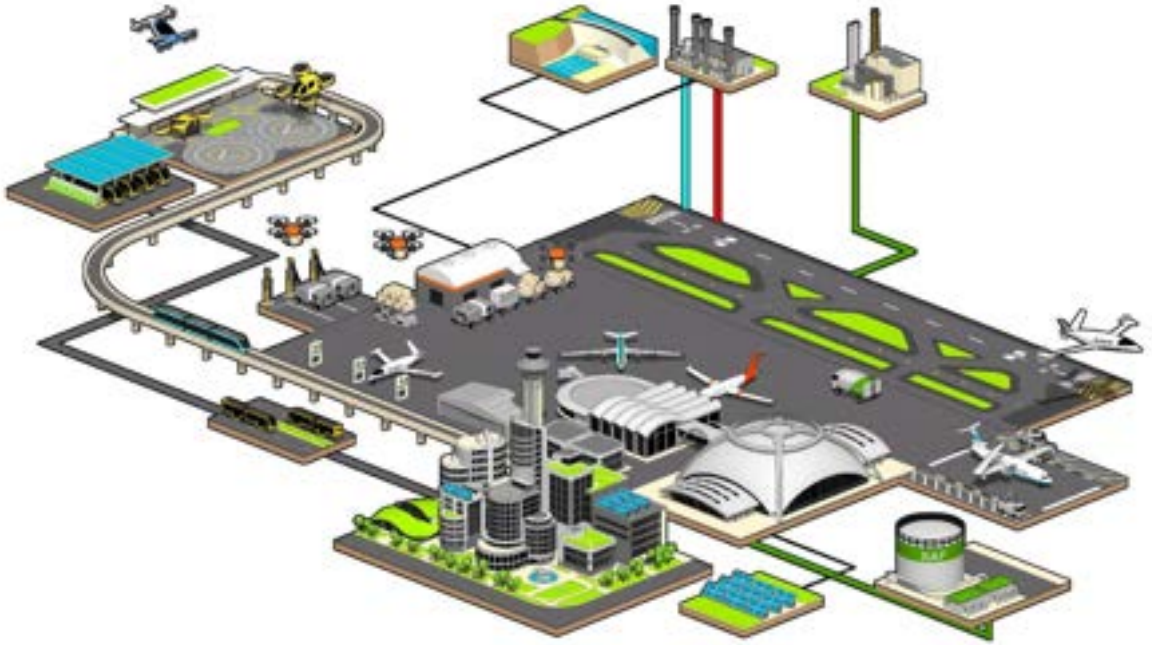
2026 SASP PAC Member Representation

ADOT Local and State Government Relations Office
- ADOT Multimodal Planning Division
- Aircraft Owners and Pilot Association (AOPA)
- Arizona Commerce Authority
- Arizona League of Cities and Towns
- The Boeing Company
- Chandler Municipal Airport
- City of Phoenix Aviation Department
- FAA Phoenix Airports District Office (ADO)
- Grand Canyon National Park Airport
- Kingman Airport
- Maricopa Association of Governments (MAG)
- Mesa Gateway Airport
- National Business Aircraft Association (NBAA)
- Pima Association of Governments (PAG)
- Prescott Regional Airport
- Southwest Mission Accelerator Center (SWMAC)
- Stantec
- Tucson Airport Authority

2026 Arizona State Aviation System Plan

Aviation Issues and Trends - Advanced Air Mobility (AAM) and Vertiports

- **Electric AAM aircraft types**
  - Vertical takeoff (eVTOL)
  - Short takeoff (eSTOL)
  - Conventional takeoff (eCTOL)
- **General vertiport considerations**
- **AAM use case opportunities**
- **Regulatory and Policy Changes**
- **AAM Planner**



2026 Arizona State Aviation System Plan

Commercial Service Airport Activity Forecasts





2026 Arizona State Aviation System Plan

General Aviation (GA) Airport Activity Forecasts

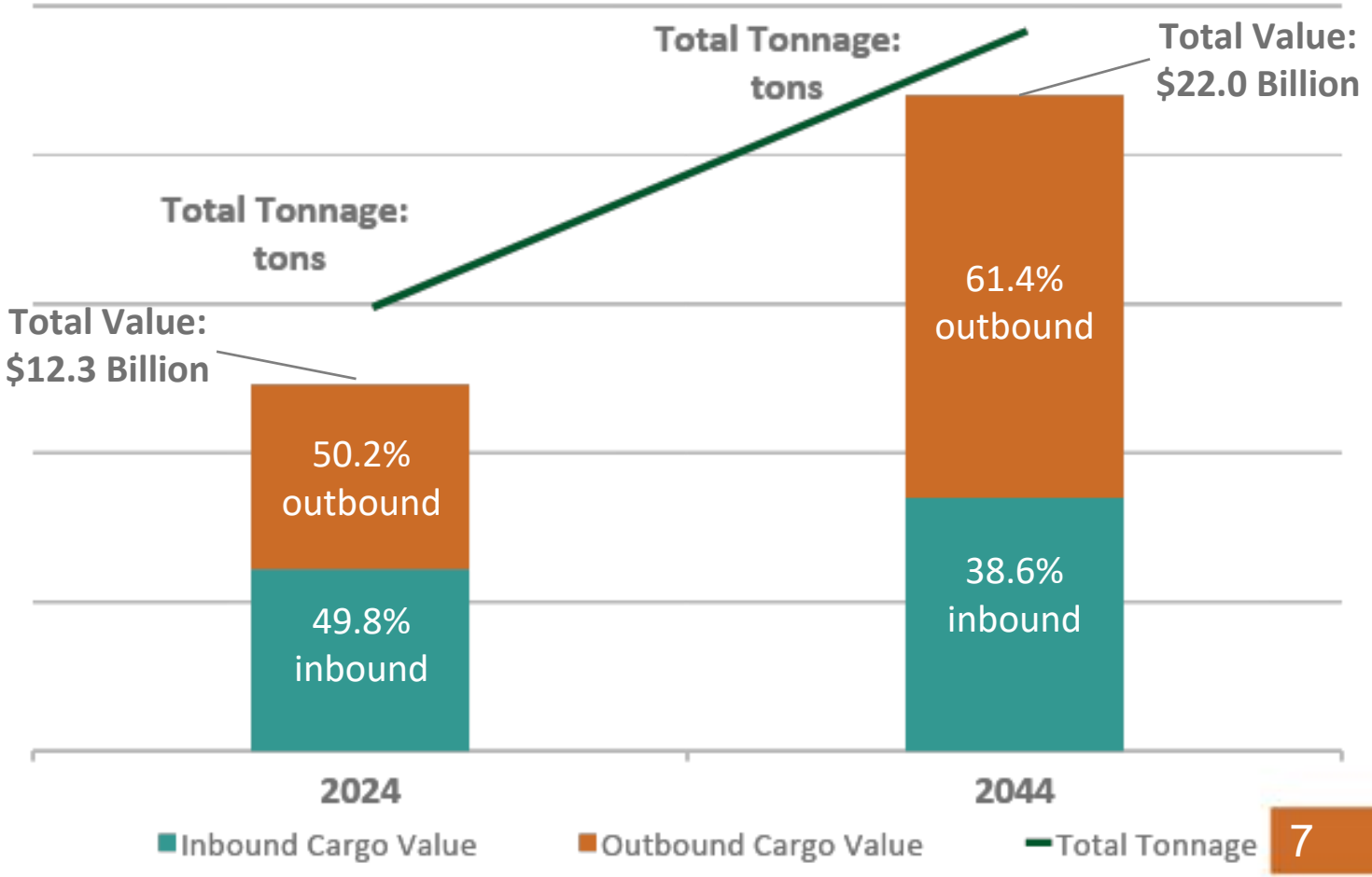




2026 Arizona State Aviation System Plan

2024-2044 Air Cargo Shipments Forecast

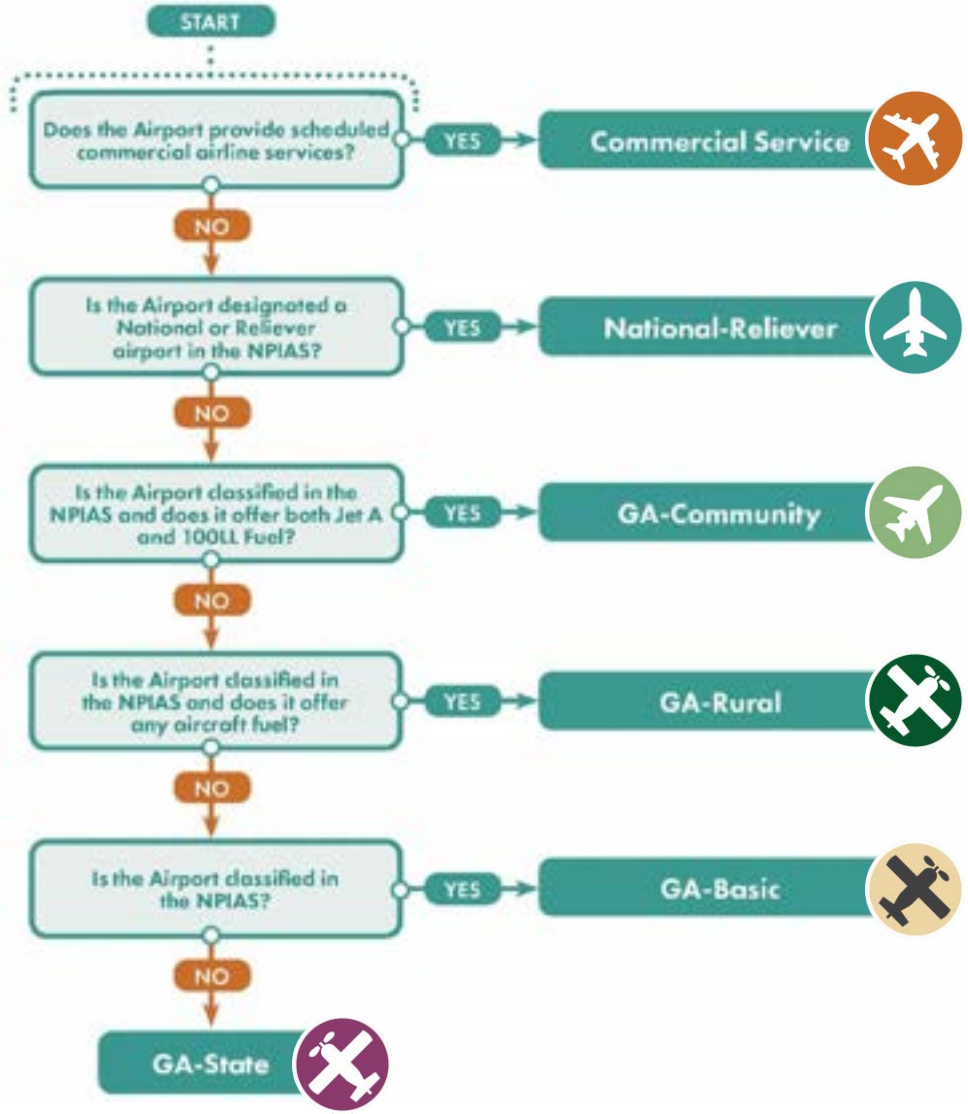
- Cargo tonnage and value forecast at the statewide level
- PHX and TUS account for 99% of statewide cargo shipments
- 61.4% Outbound due to manufacturing sector including semiconductors and microchips



Airport System Inclusion Parameters and Classifications

2026 Arizona State Aviation System Plan

2026 SASP System Airport Roles





Current and Future System Performance Evaluation

2026 Arizona State Aviation System Plan

Areas of System Performance Evaluation

Included in current and future performance evaluations

Performance Measures (PMs)

Actionable measures that can be influenced by ADOT

Example: Percent of airports with an average PCI of 70 or greater

Facility and Service Objectives (FSOs)

Targets for airports to provide infrastructure and services to meet user needs

- Airside Facilities
- Landside Facilities
- Aviation Services

Included in current performance evaluation only

System Indicators (SIs)

Informational metrics that indicate the health of the system

Example: Number of nonstop airline destinations offered

System Costs and Alternatives

Cost Estimates and Alternative Scenarios

Project Recommendations inform systemwide financial needs

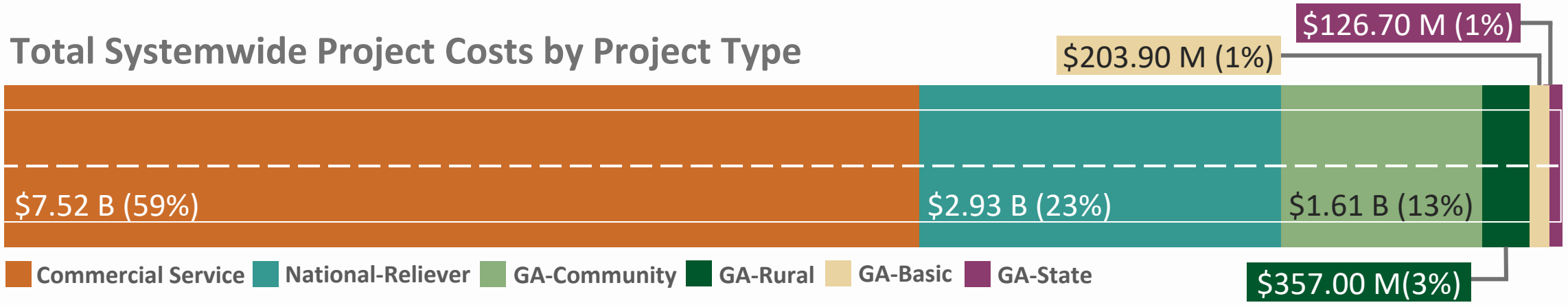
- Costs to achieve PM targets
- Costs to achieve FSOs
- Non-SASP related costs (from airport master plans/CIPs)
- Maintenance and preservation of existing infrastructure
- Expansion of capacity and capabilities

How does ADOT support the System with relatively limited resources?



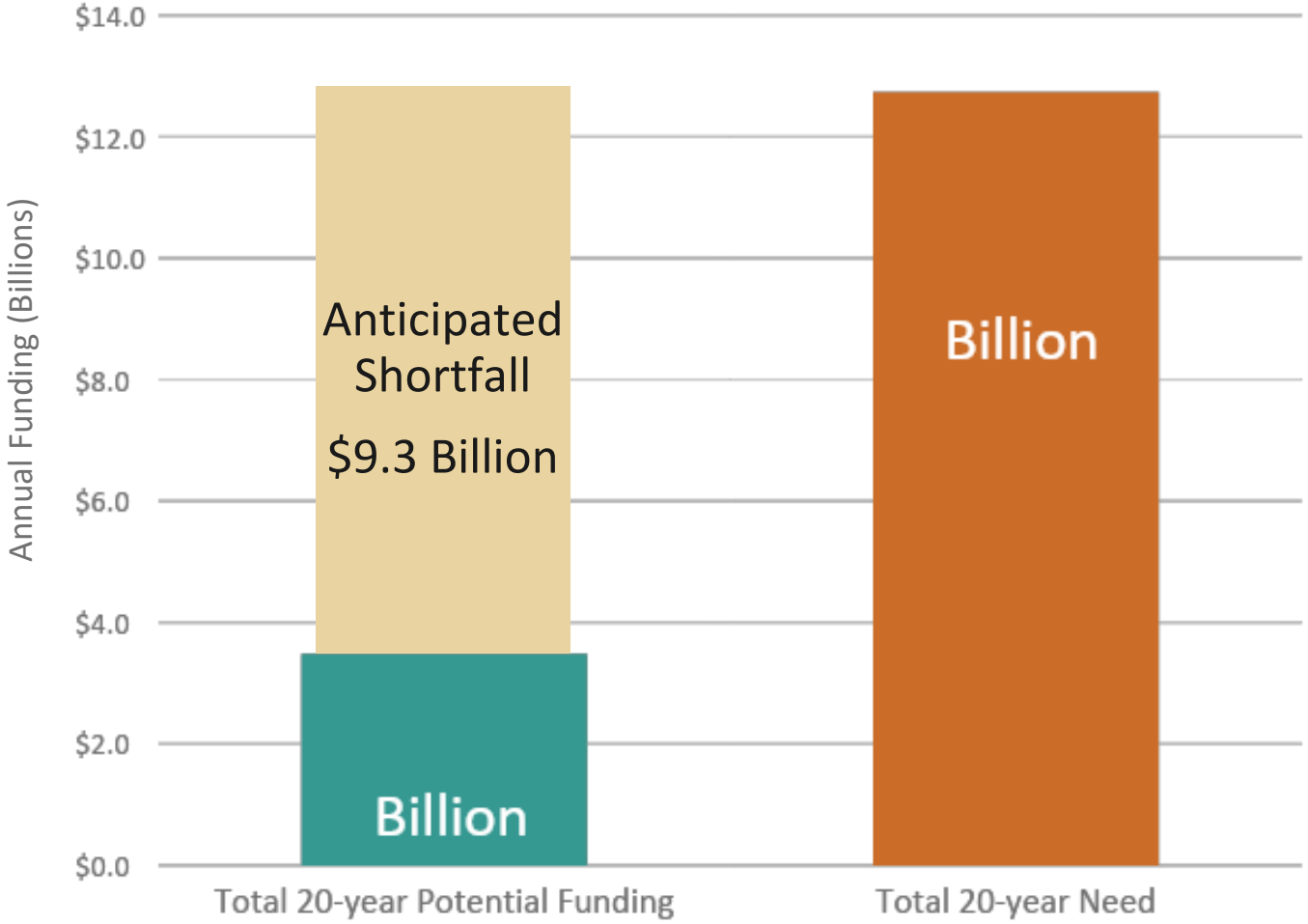
Systemwide Project Costs

Systemwide 2024-2044 Project Costs: $12.74 Billion



2026 Arizona State Aviation System Plan

20-Year Potential Funding vs. System Needs



System Needs vs. Economic Impacts

The State aviation system supports **386,000 jobs** and **generates $59.4 billion of economic activity** each year, *92 times* more than the estimated average annual funding need.

Project and Policy Recommendations

Special Study Recommendations

Some PM recommendations warrant analyses that are best performed at a statewide or regional level via a special study.

2026 SASP Special Studies:

- Demand/Capacity Study
- Advanced Air Mobility (AAM) System Plan
- Multimodal Integration Study
- Arizona Airports Economic Impact and Economic Development Study
- Obstruction Mitigation Program Study
- Airport Pavement Management System (APMS) Triennial Pavement Study
- Statewide GA Wildlife Hazard Assessment (WHA) Study

Policy Recommendations - Continued

ADOT Airport Development Guidelines

- Realign State Airport Development Grant Program Fund allocation to increase funding available to smaller GA airports (future STB approval)

2026 Arizona State Aviation System Plan

State Transportation Board Policies:

- Update Policy #38 to include the six airport role classifications assigned in the 2026 SASP
- Update Policy #39:
  - Update the match percentage of State-Local (SL) Airport Development Grant Program and Airport Pavement Management System (APMS) grants to 95% for GA-Basic and GA-State airports
  - Establish dedicated funding set-aside program, similar to APMS, for GA-State airports

Potential GA-State Set-aside Funding Levels

Potential Minimum	Potential Maximum
20% of average 5-year airport capital needs (FAA entitlement methodology)	10% of total 5-year capital needs for all GA-State airports
$700,000	$3 million

Requested Board Actions

- Approval of SASP
- Approval of Policy #38
- Approval of Policy #39