
Data Needs to Support the Economic Contribution of Aviation and Airports

Presented to the:

Workshop on Aviation Data Needs and Opportunities for Economic Analysis and Forecasting

Transportation Research Board

99th Annual Meeting

Session 1088

January 12, 2020

Steven Landau

Executive Vice-President

EBP

Purposes of Economic Contribution Studies

- **Communications to Stakeholders**
 - Policy makers (state legislators, city councils, executive offices)
 - Business interests (chambers of commerce, key industry associations)
 - General public
 - **Help evaluate airport performance**
 - Contribution to local, regional and/or state economy
 - Contingent on size & classification of airport
-

Elements

- Airport Role in the Economy
 - Lays out how airports support jobs and provide income in a region/state
- Airport Role in Economic Development
 - Explain economic development off-airport
 - Assess opportunities of aviation as a foundation for future economic growth in a region/state



Research Topics

Basic Airport Role in an Economy

- Airport Administration - operating budget and capital budget
- Tenants – by industry
- Visitors using an airport – bring money into the economy

Economic Development - Businesses Off-Airport that Rely on Aviation

- Business travel by key staff of locally based companies
 - Freight – Role in enabling production
 - Agriculture – Contribution to crop production
 - Support for Resorts and Special Events
-

Assembling Primary Data



Data Held by Airports and/or Sponsors

- Construction expenditures
 - Airport operating budget
 - Jobs
 - Labor compensation
 - Total budget
 - Tenant concession revenues (if leases are based on percent of gross revenues)
 - Fuel by gallons sold or revenues at point of sales or taxes remitted
-

Tenant Data

(Excluding what can be provided by airports/sponsors)

Primary Data: Survey of Tenants

- Industry
- Fulltime/part time jobs
- Labor compensation
- Privately funded construction (e.g., hangers or buildout of concession space)

AIRPORT TENANT SURVEY

1. Business/Company Information

Company Name: _____

Contact Name: _____

Contact Telephone Number: _____

Contact Email Address: _____

(Contact information is in case we need to ask a follow-up question or clarify a response.)

2. What is your firm's primary product or service? (Select the answer that best describes your business. Multiple answers can be provided if you have two or more business types—select all that apply.)

<ul style="list-style-type: none"> — Air Transportation — Architectural/Engineering Services — Aviation-Related Manufacturing — Aviation-Related Repair and Maintenance — Aviation-Related Specialized Services — Car Rental — Construction — Courier/Overnight Delivery Services — Facility Maintenance (buildings) — Fixed Base Operator — Food Service — General Manufacturing — Government – FAA 	<ul style="list-style-type: none"> — Government – Local or Regional — Government – Military — Government – Other Federal — Government – State — Government – TSA — Ground Transportation (other than car rental) — Grounds Maintenance — Public Safety — Retail — Security, non-TSA — Wholesale & Distribution — Other (Please Specify) _____
---	---

3. How many people does your firm employ or contract with at Hartsfield-Jackson Atlanta International Airport?

Full Time (30 hours per week or more) _____

Part Time (Less than 30 hours per week) _____

Independent Contractor (full and part time) _____

Total _____

4. Please provide the number of employees by zip code of residence. This is to document the economic importance of the Airport to each county and city in metropolitan Atlanta, as well to the State of Georgia. List total by zip code.

EXAMPLE: If your company has 10 full and part time workers, with six who live in zip code 30360, 3 who live in zip code 30384 and 1 who lives in zip code 30106, please provide a table that looks like this:

Zip code	Employees
30360	6
30384	3
30106	1
TOTAL	10

5. What is your firm's annual payroll for Airport-related employees (including any off-airport operations included in questions 2 and 3). Please include payments to contract employees. This will help ensure an accurate report (This information will also be kept confidential).

\$ _____

Visitor Spending

Start With Number of Visitors

– Commercial Service Visitors =

Enplanements – (local travelers + connecting passengers)

– General Aviation Visitors =

(Total operations – (locally based ops + local itinerant ops)) x .50 x number of passengers per aircraft

Common Sources	
Commercial Service Visitors	BTS T100 and O&D datasets Data bases such as Diio or Airline Data Inc.
GA Visitors	Airport manager and/or FBO estimates 5010 reports, TAF

Visitor Spending

- Dollars spent in targeted economy
- Basic Categories
 - ✓ Lodging
 - ✓ Restaurants and Bars
 - ✓ Entertainment
 - ✓ Retail
 - ✓ Local Transportation (not on-airport car rental and ground transportation)

More detail is better, but might be cumbersome

Are you visiting this area? Yes (continue)
 No - I live here (do not continue)
 No - I'm connecting at SFO (do not continue)

2. What is the primary purpose of your trip?
 Business / Convention
 Pleasure / Personal
 Other (specify): _____

3. How many nights did you stay in the San Francisco Bay Area?
 One night Four nights
 Two nights Five nights
 Three nights Other (specify): _____

4. In what type of overnight accommodations did you stay? In what city was it located?
 Paid lodging (e.g. hotel, motel, resort, AirBNB)
 Free lodging (e.g. private home)
 Other (specify): _____

City/Town: _____

SPENDING
 5. Please indicate how much you spent OFF-AIRPORT on each item while visiting the San Francisco Bay Area. *An estimate for each is fine. Please DO include business expenses.*

\$ _____ Lodging
 \$ _____ Food/Beverages
 \$ _____ Rental Car
 \$ _____ Entertainment
 \$ _____ Retail Purchases
 \$ _____ In-town taxis/Uber/Lyft rides
 \$ _____ Other (specify) _____

6. How many people were covered by the costs above?
 One (yourself) Four
 Two Five
 Three Other (specify): _____

AIRPORT TRAVEL
 7. What mode of transportation did you use to travel to and from SFO?
 Private car Charter bus
 Taxi Scheduled airporter
 Limousine Door to door van
 Uber/Lyft Hotel/Motel shuttle
 BART Rental car
 Public bus Other (specify): _____

7a. What was the total cost for transportation to and from SFO?
 \$ _____ *(Skip if you used a rental car)*

8. Approximately how soon before your scheduled departure did you arrive at the airport today?
 (hours) (minutes)

9. Airline flying today: _____

ABOUT YOURSELF
 Please provide the following demographic information:

10. Where do you live?
 If in U.S.:
 City _____
 State _____ Zip _____
 If not in U.S.:
 Country _____

11. Are there any children in your group under 3 years old?
 Yes
 No

Visitor Spending Sources

- Preferred Primary Data: Surveys of visitors
- Secondary Data: Publications by state or local tourism agencies, tourist research centers at universities, other studies that have conducted visitor surveys (not necessarily aviation)
- When appropriate and supportable by data collection display spending by origin and trip purpose

Origin and Trip Purpose			
International Origin		Domestic Origin	
Business	Leisure	Business	Leisure

Primary Data Research Need – Visitor Spending

- Develop accepted estimates if primary data are unobtainable

Commercial	General Aviation
Estimate visitor spending per trip by destinations' economic and demographic characteristics and tourist attractions, trip purpose (business/personal), point of origin (international/domestic), flight characteristics and other factors	<p>Identify “true visitors”.</p> <ul style="list-style-type: none">• All Operations – Itinerant Operations – Transient Operations• Passengers per Aircraft (including pilots and crew) by type of aircraft <p>Estimate visitor spending per trip by aircraft mix, destinations' economic and demographic characteristics and tourist attractions, trip purpose (business/personal), point of origin (international/domestic), and other factors</p>

Research Need – Vetting & Comparing Secondary Data Sources and Tools

Secondary Data

- Establishment level data base
 - Flat geo-coded files or interactive GIS
 - Usually includes total jobs. Sometimes includes business sales
- Regional/state econometric data
 - Provides relationships of jobs, labor income (or wages/salaries), value added and output (or business sales)
- Publications by state or regional tourist agencies
- Tax tables

Tools

- Input/output model for target geographies
 - Calculate indirect/induced effects

Airport Role in Economic Development

Topic	Frequently Used Data Sources
Freight	Foreign Trade Database of US Census or Intermediary Source like WISERTrade; FAF
Agriculture	USDA Census of Agriculture, State Ag. Departments and Ag. Aviation Associations, National Ag. Aviation Association, Universities/Extension Programs

Thank You

– Questions/Discussion

Steven Landau

EBP

617-338-6775 x 206

Steven.landau@ebp-usa.com

www.ebp-usa.com
