

Economic Impact Data Collection at General Aviation Airports: Issues and Solutions

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Purposes of Economic Impact/Contribution Studies

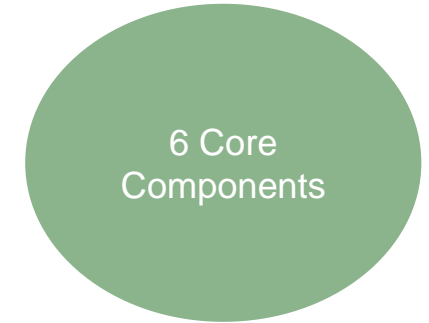
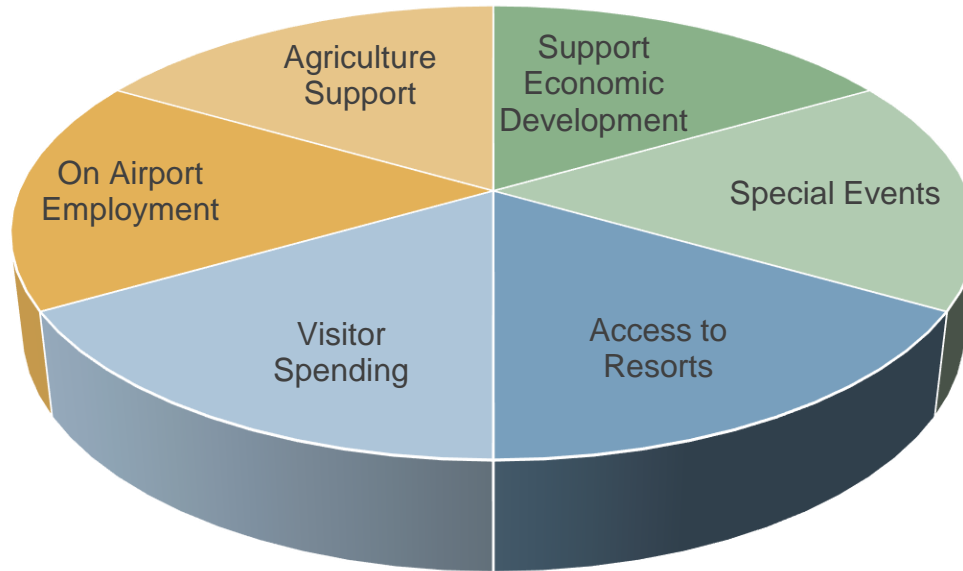
– Communications to Stakeholders

- ♦ 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

Roles of GA in the Economies of Regions & States



Jobs On Airport (and Associated Labor Income and Output)

Airport Management and Tenants (Other than FBO)

- **GA-Only**
 - All activity on airport
- **Commercial Service Airports with GA**
 - Portion of management
 - Portion of airport construction projects

Obtain by tenant survey and interviews with airport manager and staff

FBO/FBO Functions

- **FBO jobs**
 - Fueling
 - Line services
 - Maintenance/repair
 - Hangers/Construction

Some of these GA-aircraft service functions may not be provided by FBOs

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 the airport
 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

Key Issues for Survey

Working with FBOs

- Critical to enlist cooperation
- Work with FBO
Owner/COO *and* desk staff

Screen GA Passengers/Pilots

- Separate visitors from local

Collect and Retrieve Surveys

- Paper (Shoe Box)
- Takeaway card with link or QR Code for phone
- Electronic
- Tablet
- Survey Monkey

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

| International Origin | | Domestic Origin | |
|----------------------|---------|-----------------|---------|
| Business | Leisure | Business | Leisure |

Agriculture

– Aerial Applicators (crop spraying)

- ◆ Protect crop value by preventing trampling by tractors/trucks
- ◆ Enable crop production (and employment pilots)
- ◆ Support agricultural sector and a variety of other industries by purchasing supplies and paying wages that are spent at businesses throughout the state.

National Agricultural Aviation Association estimates that 28 percent of all cropland is treated by aerial applicators

| <u>Key Sources</u> | <u>Issues</u> |
|--|--|
| <p><u>Local</u>: State agriculture departments, universities/extension programs, state applicator associations and other experts, airport tenant surveys</p> | <p>Local data not always obtainable, particularly regarding applications for specific crops. May require estimates and anecdotal accounts.</p> |
| <p>National: USDA (Census of Agriculture, NAAA (also in states))</p> | <p>Data not always sensitive to local/state situations</p> |

Support Economic Development - Connectivity



GA allows major businesses to thrive in rural areas, small cities and even larger cities

Allow connectivity:

- Executives visit actual/potential customers/suppliers without relying on airline schedules and connections

Research Issues – Choose between building a data base or conducting case studies:

- Working with FBO to identify business owned based aircraft
- Securing agreements of businesses for case studies

Land Use and Development Off-Airport

Surveys and interviews, windshield/foot surveys, assessors' records, GIS databases

Influences on Land Use & Economic Development



- Supporting just-in-time deliveries
- Aviation related firms near airport
- Industrial/business parks & “through the fence agreements

USEFUL TOOLS

*Surveys and interviews,
windshield/foot surveys,
assessors' records, GIS database*

In-depth Case Study

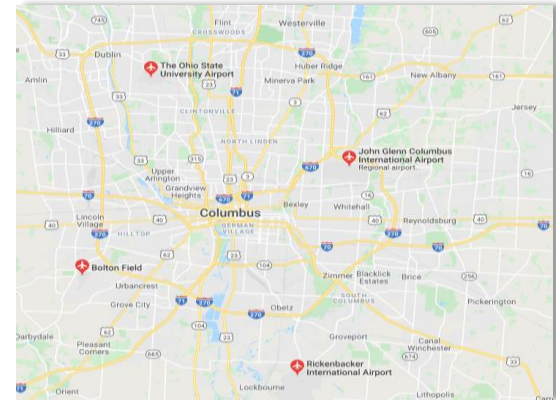


- Identify a major company in a mid-sized city that uses both commercial services and GA
- Company headquarters could not be in present location (with some but limited commercial service) without based aircraft

Special Events



GA Airports provide opportunities to attract big spenders to a region for large events



Access To Resorts



– National and international access to remote resorts

◆ High-end visitor spending

- High end lodging
- Gourmet foods
- High staff to guest ratios
- Specialized activities and services

Examples:

Spas

Golf

Hunting & fishing

Mountain and water access



Complementary Tools: Filling-in Data

– Need a matrix of industries showing relationships of:

| Industry Sector | Jobs | Labor Income | Value Added | Output |
|-----------------|----------------------|--------------|-------------|--------|
| Industry Name | # (headcount or FTE) | \$ | \$ | \$ |

| Data Availability Situation | Jobs | Labor Income | Revenue |
|-----------------------------|------|--------------|---------|
| Option 1 | X | O | O |
| Option 2 | X | X | O |
| Option 3 | O | O | X |
| Option 4 | X | X | X |

KEY: X = Data Directly Available O = Data Imputed Based

Using An Establishment Level Data Base

37 Results 0 with e-mail addresses [more info]

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Review Details Heat Map Summary Charts Download Print Save Search

| Company Name | Executive Name | Street Address | City, State | ZIP | Phone | Corp. Tree |
|-----------------------------|----------------|--------------------------------|-------------------|-------|----------------|------------|
| Adept Marketing | | 855 Grandview Ave # 140 | Columbus, OH | 43215 | (614) 360-3132 | |
| Air Evac Ems | | 2929 Lancaster Thornville Rd N | Lancaster, OH | 43130 | (740) 681-5701 | |
| Alvis House | | 1755 Alum Creek Dr | Columbus, OH | 43207 | (614) 443-4989 | |
| Boeing Co | | 801 Irving Wick Dr W | Heath, OH | 43056 | (740) 788-4000 | |
| Bombardier Aerospace | | 4130 E 5th Ave | Columbus, OH | 43219 | (614) 231-4167 | |
| Coastal Realty Information | | 4449 Easton Way # 2 | Columbus, OH | 43219 | (614) 934-1814 | |
| Cooper-Standard | | 2378 State Route 345 NE | New Lexington, OH | 43764 | (740) 342-3523 | |
| E Star Aerospace Corp | | 5293 Karl Rd | Columbus, OH | 43229 | (614) 396-6868 | |
| Facilities Excellence LLC | | 113 Commerce Park Dr # B | Westerville, OH | 43082 | (800) 354-2602 | |
| Facilities Operations & Dev | | 2003 Millikin Rd # 150 | Columbus, OH | 43210 | (614) 292-5725 | |
| Girfriend's Cleaning | | 3040 Riverside Dr # 201 | Columbus, OH | 43221 | (614) 739-2000 | |
| Henry Letter Foto | | 344 E Maple St | Granville, OH | 43023 | (614) 670-6126 | |
| Honeywell | | 4265 Diplomacy Dr | Columbus, OH | 43228 | (614) 850-7063 | |

- Acquire data for non-responding tenants
- Identify off-airport businesses connected to an airport by industry/proximate location
- Many vendors
 - ♦ Jobs and estimates of business sales and key purchases
 - ♦ Addresses and contact information

Thank You

–Questions/Discussion

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