Effective Communication and Utilization of Airport Economic Impact Studies

Findings from ACRP Synthesis 125

NATIONAL ACADEMIES Sciences Engineering Medicine

TRB TRANSPORTATION RESEARCH BOARD

ACRP AIRPORT COOPERATIVE RESEARCH PROGRAM

Today's Learning Objectives

1. Understand the role and objectives of airport economic impact studies

2. Determine effective communication and implementation strategies

3. Evaluate outcomes and best practices from case studies

American Association of Airport Executives (AAAE)

1.0 Continuing Education Units (CEUs) are available to Accredited Airport Executives (A.A.E.)

Report your CEUs:

www.aaae.org/ceu

American Institute of Certified Planners (AICP)

1.5 Certification Maintenance Credits

You must attend the entire webinar to be eligible for credits

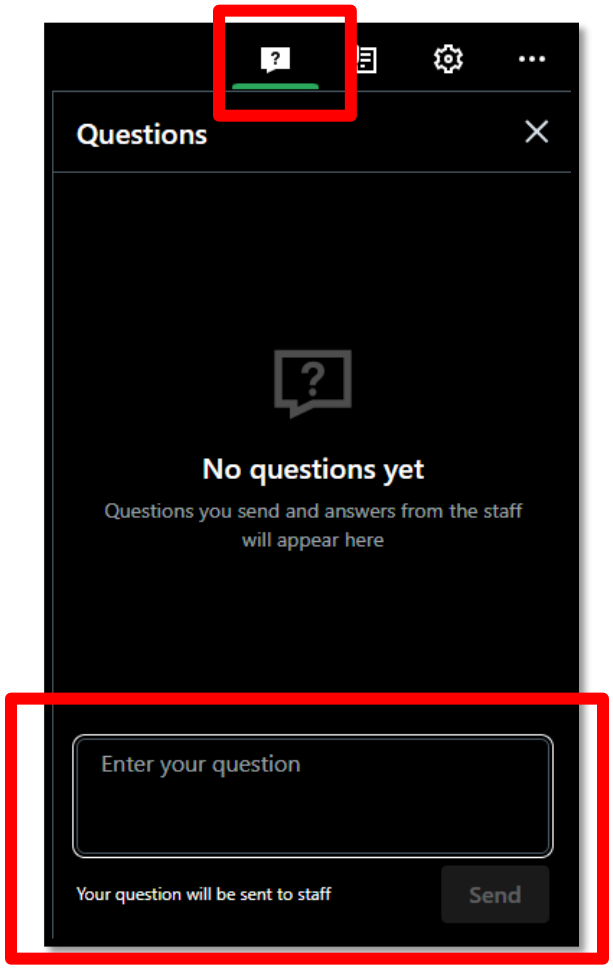
Log into the American Planning Association website to claim your credits

Questions and Answers

Please type your questions into your webinar control panel

We will read your questions out loud, and answer as many as time allows

#TRBwebinar



Regan Schnug, AICP
Senior Project Manager, Kimley-Horn

- 17 years of experience as an aviation planning consultant.
- Leads the development of aviation planning studies specializing in aviation economic impact studies, state aviation system plans, and airport land use compatibility
- Contributed to several statewide planning projects, including statewide airport economic impact studies for Colorado, Pennsylvania, Indiana, and West Virginia
- Served as Principal Investigator and a contributing author to several national guidance documents ACRP and the FAA

Speaker Introductions

Georgia Twyerould, AICP
Contributing Author
Kimley-Horn

Daniel Findley, PhD, PE
Contributing Author
ITRE

Todd Green
Program Manager
CDOT Aeronautics

Kimley»Horn
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ITRE
Institute for Transportation Research and Education

COLORADO
Department of Transportation

Webinar Agenda

1. Introductions
2. Project Purpose & Timeline
3. Project Process
4. Research & Synthesis
5. Case Examples

ACRP Synthesis 125 Panel

Panel Members

Dr. Yi Gao, Associate Professor, Purdue University

Rylan Juran, Aviation Planning Director, Minnesota DOT

Barbara Elwood Schalmo, Associate Director, C&S Companies

Bobby Walston, Director, North Carolina DOT Division of Aviation

Elie Zogheib, Airport Chief Engineer, Cleveland Airport Systems

Liaison Representative

Liying Gu, Vice President, Airports Council International

CRP Staff

Jordan Christensen, Senior Program Officer, TRB

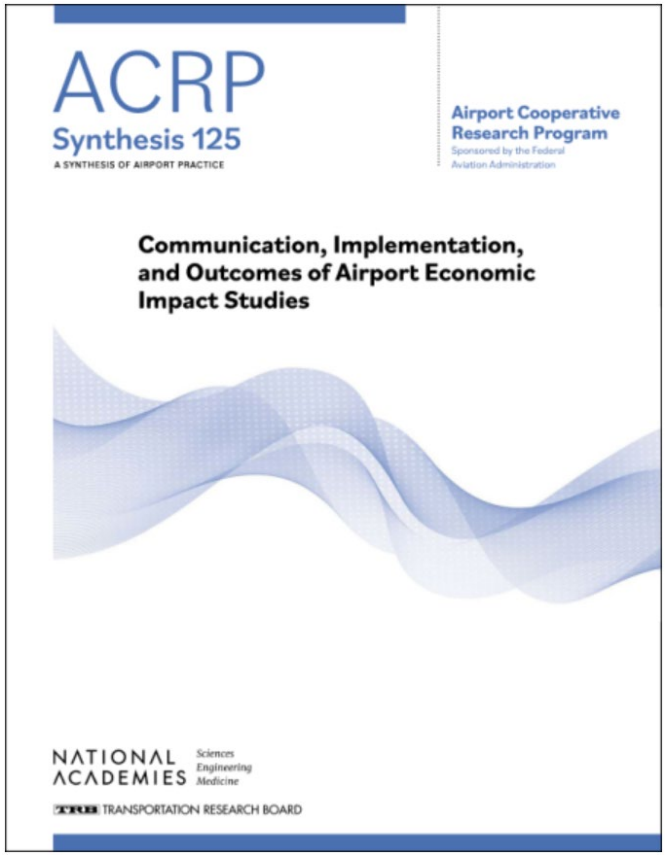
Demisha Williams, Senior Program Assistant, TRB

Project Purpose & Timeline

Project Purpose is to provide information on:

- How airport economic impact studies have been communicated to stakeholders
- How the studies have been implemented to achieve objectives
- What the results effects were to the agencies and airports involved

Timeline: March 2022 – January 2023



Project Process

- Surveys
  - National Association State Aviation Officials (NASAO)
  - American Association of Airport Executives (AAAE)
  - American Council Internation (ACI)
- Literature review (86 AEISs + industry resources/ publications)
- 6 case examples (states, regions, airports)
- Draft report & panel review
- Final report

Research & Synthesis

Frequency of Updates

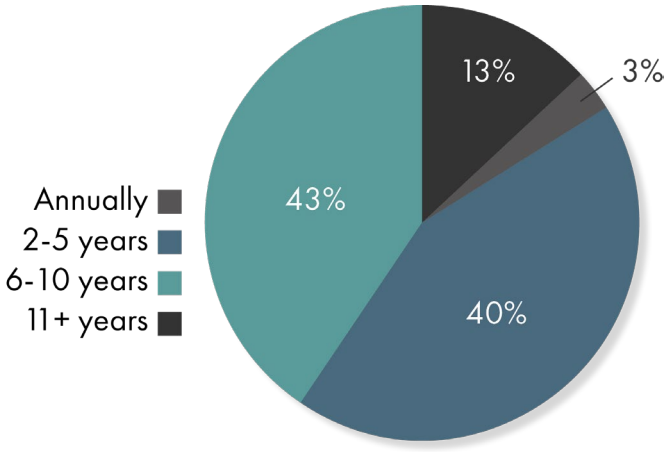


Figure 3-2. Results of Survey Question Regarding Frequency of Economic Impact Studies
Source: ACRP S03-18 Survey, 2022.

Sources of Impact

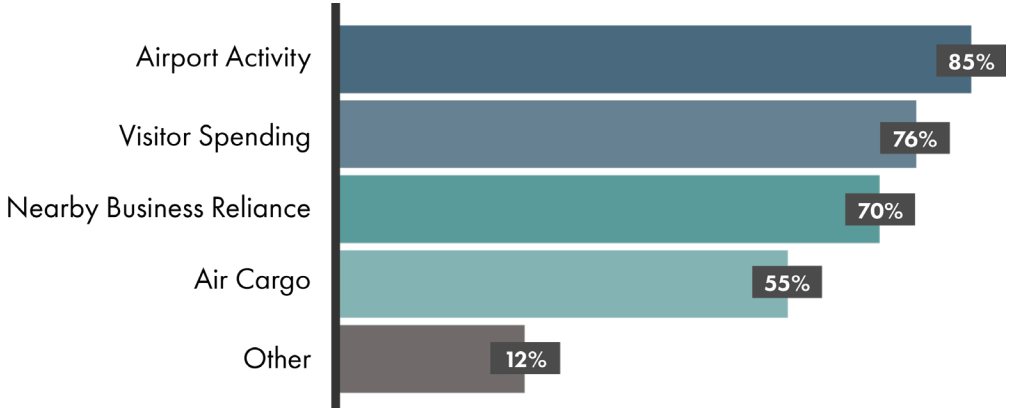


Figure 3-5. Results of the Survey Question Regarding the Sources of Impact Included in the Study
Source: ACRP S03-18 Survey, 2022.

Economic Impact Study Objectives for Airports

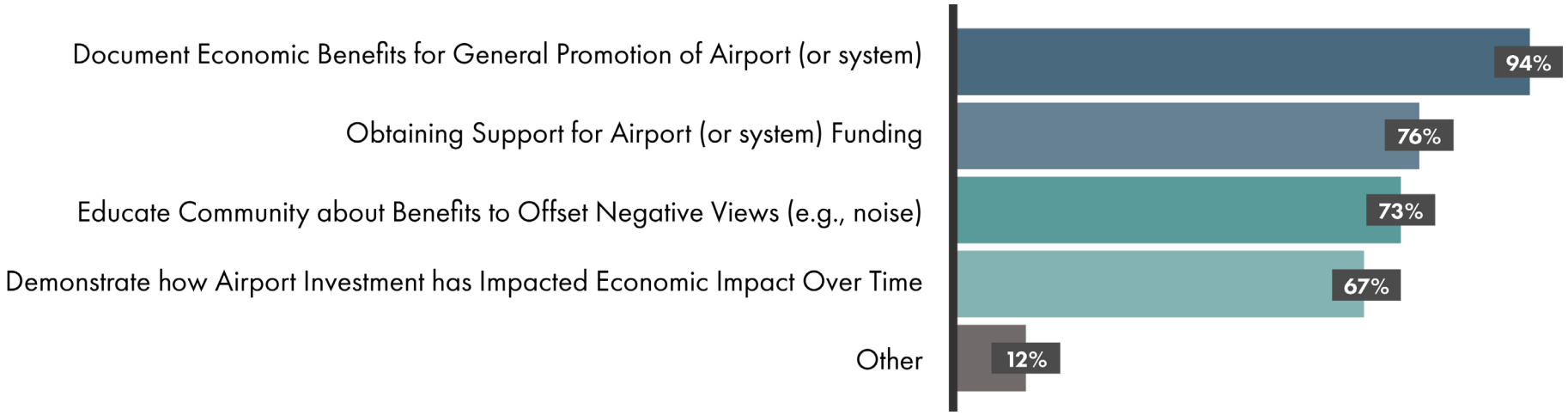


Figure 3-4. Results of Survey Question Regarding the Objective for Conducting an AEIS
Source: ACRP S03-18 Survey, 2022.

Research & Synthesis

Intended Audience

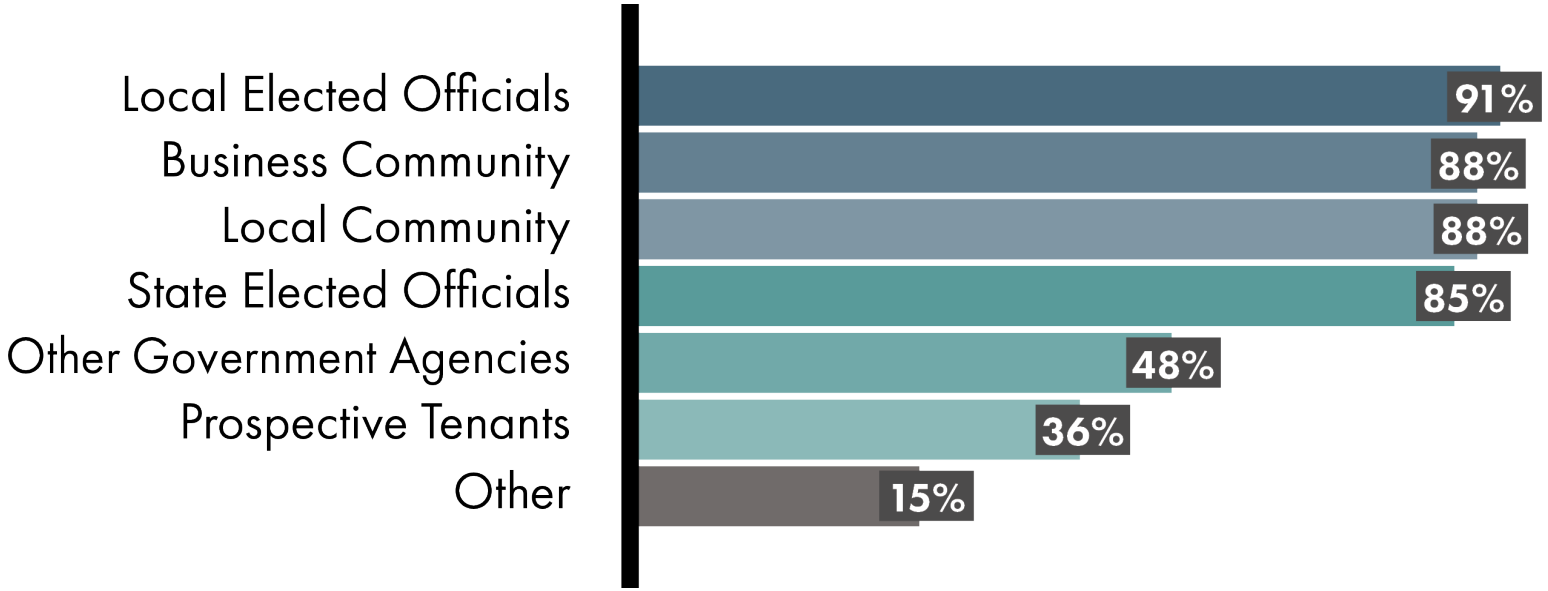


Figure 3-6. Results of the Survey Question Regarding the Intended Audience of the AEIS]
Source: ACRP S03-18 Survey, 2022.

Research & Synthesis

Dissemination Methods

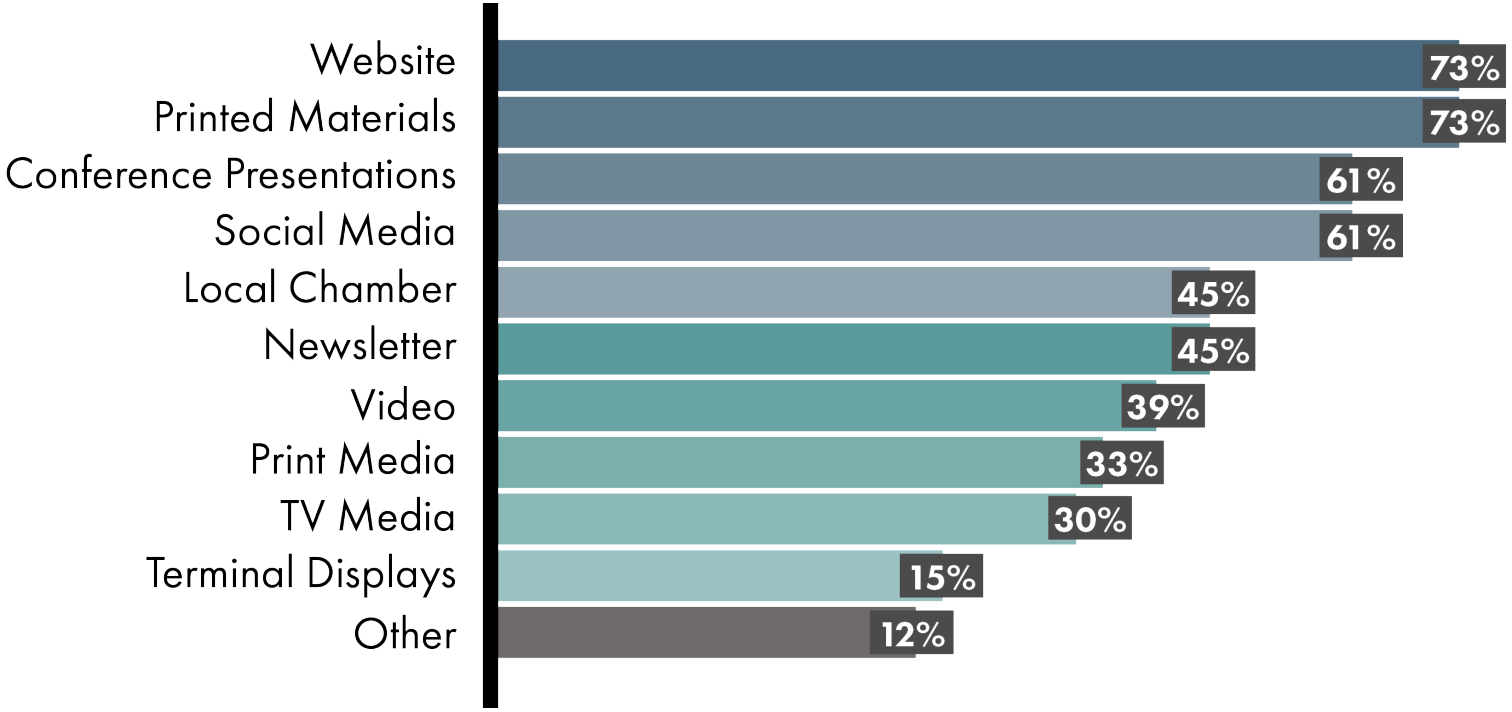
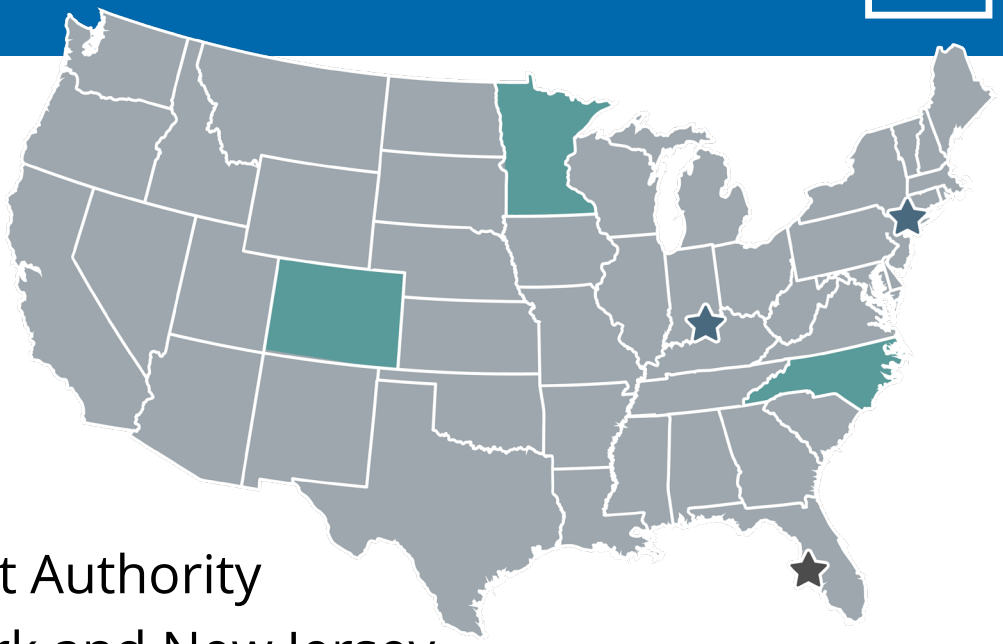


Figure 3-7. Results of the Survey Question Regarding Methods for Sharing AEIS Results
Source: ACRP S03-18 Survey, 2022.

Case Examples



Airport Study (1)
Regional Studies (2)
State Studies (3)

Airport-Specific

St. Pete-Clearwater International Airport

Regional

Louisville Regional Airport Authority

Port Authority of New York and New Jersey

State

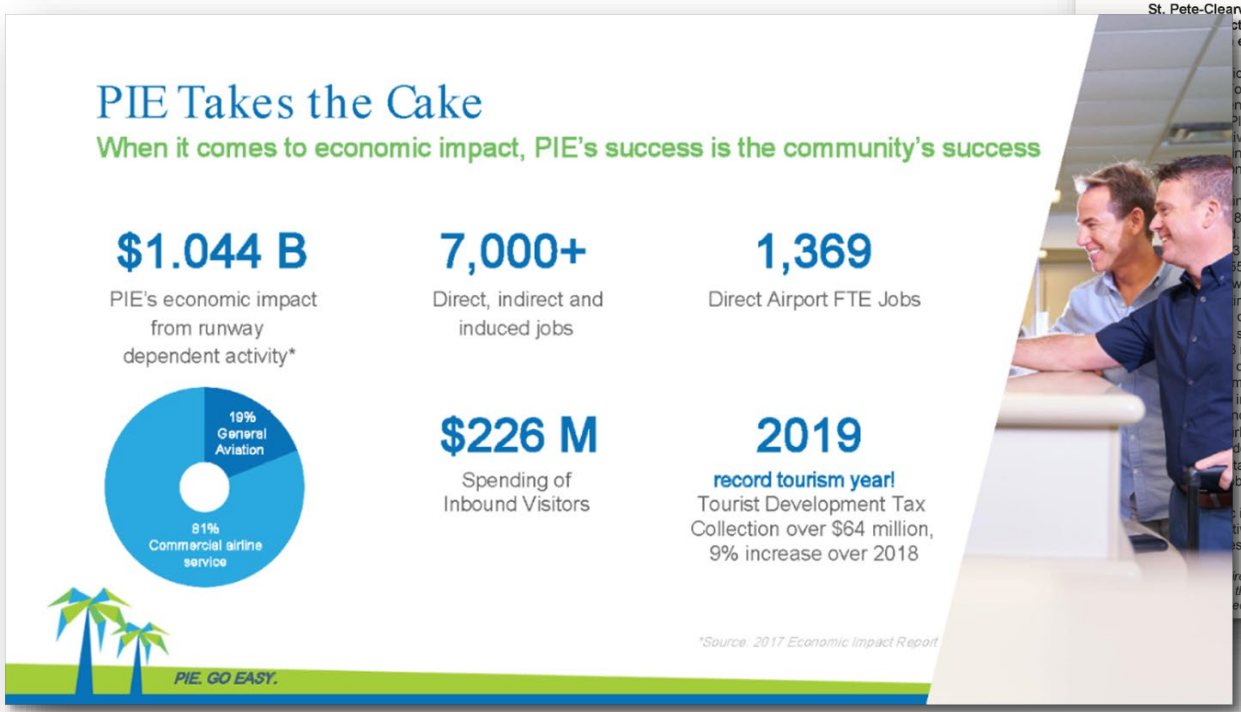
North Carolina Department of Transportation

Minnesota Department of Transportation

Colorado Department of Transportation

Case Example: St. Pete-Clearwater International Airport (PIE)

✈ PIE Runway Dependent Activity



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MEDIA RELEASE

January 23, 2018

Contact: Michele Routh, Public Relations Director, mrouth@fly2pie.com, 727-453-7879

St. Pete-Clearwater International (PIE) Economic Impact Report 2017

St. Pete-Clearwater International Airport's (PIE) estimated economic impact from runway ctivity is estimated at $1.044 billion. The direct, indirect, and induced* impact estimated 7,020 full-time equivalent (FTE) jobs.

icant economic driver for the region with air travel essential to Florida's and Pinellas ourism Industry. As the ninth busiest of Florida's 20 commercial airports plus neral aviation and military operations, PIE is key in sustaining and growing economic PIE contracted with Volaire Aviation Consulting to develop a comprehensive Airport ivity and Economic Impact Study. The focus of the study was on "runway dependent" ng commercial air service and general aviation impacts. Additionally, the study nomic impact of each new route added.

nclude:
81% of the annual output is the result of PIE airline service, 19% General Aviation
direct airport FTE jobs with labor income of $81.275 million, a per FTE equivalent of 55.
were considered a single employer, it would be the 19th largest in the county.
imated 525,867 (2016) inbound visitors used PIE as their gateway and spent $226 dollars during their visit.
spending created direct, indirect, and induced jobs totaling 3,848 FTE, generating million in labor income and $363.1 million in economic output.
domestic route's estimated economic impact is 86.4 FTE jobs and $12.95 million in mic output.
international route's estimated annual economic impact is estimated at 47.3-181.4 FTE nd $4.51-17.17 million economic impact (based on international origin).
irline aviation operations in 2016 were 71% of PIE's 113,150 operations with ten runway dent non-airline businesses operating at PIE, generating 629.5 FTE direct jobs.
al economic impact of non-airline (General and Military Aviation) is estimated at 1,417.1 bs and total economic output of $196.14 million.

impact report presented excludes the airport's economic impact from non-runway tivity such as real estate development and leasing. Notable exclusions include the ss Park and other non-aeronautical leases and permits.

rect impact – the measure of jobs and spending at the airport; Indirect impact – Economic the airport, but resulting from airport jobs and spending; Induced impact – Economic activity eople and businesses benefitting from the indirect impacts.

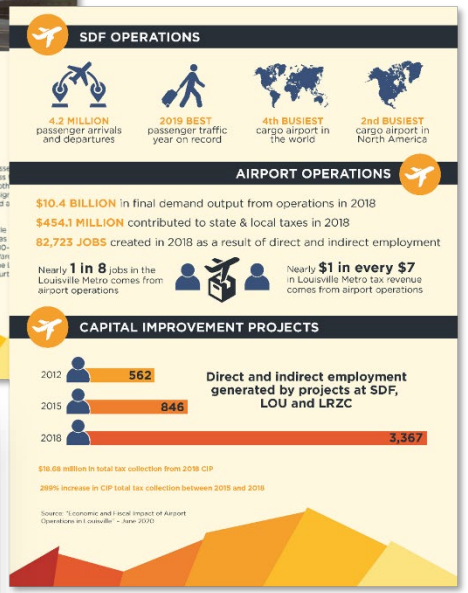
Case Example: Port Authority of New York and New Jersey (PANYNJ)

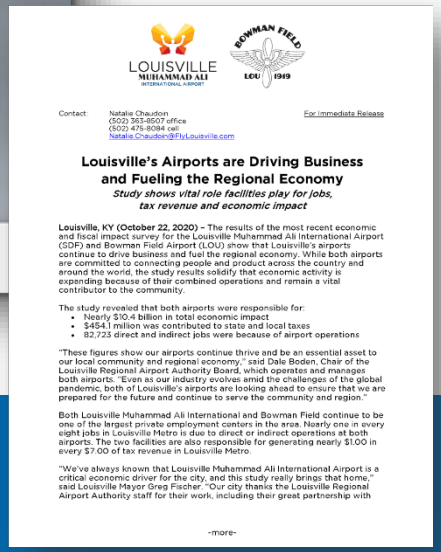
- ✈ John F. Kennedy Int'l (JFK)
- ✈ Newark Liberty Int'l (EWR)
- ✈ LaGuardia (LGA)
- ✈ NY Stewart Int'l (SWF)
- ✈ Teterboro (TEB)

Economic Impact for the NY/NJ Region	EWR	JFK	LGA	SWF	Total
Passenger Operating Impact					
Labor Compensation	$ 5,069	$ 5,643	$ 2,073	$ 13	$12,799
Total Final Sales	$17,133	$19,074	$ 7,007	$ 44	$43,257
Full-Time Jobs Supported	53,530	59,595	21,891	138	135,154
Visitor Economic Impact					
Labor Compensation	$ 3,845	$ 4,076	$ 2,065	$ 11	$ 9,998
Total Final Sales	$ 7,210	$ 7,642	$ 3,872	$ 21	$18,746
Full-Time Jobs Supported	46,947	49,757	25,213	138	122,055
Cargo Impact					
Labor Compensation	$ 1,364	$ 5,341	$ 4.9	$ 21	$ 6,731
Total Final Sales	$ 3,847	$15,062	$ 14	$ 60	$18,983
Full-Time Jobs Supported	21,457	84,004	77	332	105,870
Capital Spending Impact					
Labor Compensation	$ 508	$ 100	$ 208	$ 0.1	$ 816
Total Final Sales	$ 1,120	$ 220	$ 457	$ 0.2	$ 1,798
Full-Time Jobs Supported	6,396	1,253	2,611	1	10,261
Total Economic Impact					
Labor Compensation	$10,787	$15,160	$ 4,351	$ 46	$30,343
Total Final Sales	$29,311	$41,997	$11,350	$125	$82,783
Full-Time Jobs Supported	128,329	194,609	49,792	608	373,340

Case Example: Louisville Regional Airport Authority (LRAA)

- ✈ Louisville Muhammad Ali Int'l (SDF)
- ✈ Bowman Field (LOU)




LOUISVILLE MUHAMMAD ALI INTERNATIONAL AIRPORT
BOWMAN FIELD LOU 1919

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For Immediate Release

Louisville's Airports are Driving Business and Fueling the Regional Economy

Study shows vital role facilities play for jobs, tax revenue and economic impact

Louisville, KY (October 22, 2020) – The results of the most recent economic and fiscal impact survey for the Louisville Muhammad Ali International Airport (SDF) and Bowman Field Airport (LOU) show that Louisville's airports continue to drive business and fuel the regional economy. While both airports are committed to connecting people and product across the country and around the world, the study results solidify that economic activity is expanding because of their combined operations and remain a vital contributor to the community.

The study revealed that both airports were responsible for:

- Nearly $10.4 billion in total economic impact
- $454.1 million was contributed to state and local taxes
- 82,723 direct and indirect jobs were because of airport operations

"These figures show our airports continue thrive and be an essential asset to our local community and regional economy," said Dale Boden, Chair of the Louisville Regional Airport Authority Board, which operates and manages both airports. "Even as our industry evolves amid the challenges of the global pandemic, both of Louisville's airports are looking ahead to ensure that we are prepared for the future and continue to serve the community and region."

Both Louisville Muhammad Ali International and Bowman Field continue to be one of the largest private employment centers in the area. Nearly one in every eight jobs in Louisville Metro is due to direct or indirect operations at both airports. The two facilities are also responsible for generating nearly $1.00 in every $7.00 of tax revenue in Louisville Metro.

"We've always known that Louisville Muhammad Ali International Airport is a critical economic driver for the city, and this study really brings that home," said Louisville Mayor Greg Fischer. "Our city thanks the Louisville Regional Airport Authority staff for their work, including their great partnership with

-more-

Case Example: Minnesota

EXAMPLES OF HOW BEMIDJI REGIONAL AIRPORT SUPPORTS THE COMMUNITY

The airport supports many uses and users that help sustain vital services and business needs.

Aerial Inspections

The Department of Natural Resources (DNR) uses the airport for aerial inspections. The agency is responsible for monitoring wildlife, parks, forests, fishing, and water resources. Aviation is an essential tool that enables the DNR to carry out its activities and missions over an area of almost 8,750 square miles. Aerial inspections conducted from this airport help monitor and protect the state's environment.

Educational Support

Concordia Language Villages is a language and cultural immersion program located just north of Be
800 acres around Turtle River Lake, and each year the facility hosts approximately 10,000 peopl
immersion programs to youth, families and adults in more than 11 languages, as well as training in world
responsibility. The airport supports this institution and the local economy by providing convenient a
Bemidji State University is home to about 6,000 students. Universities rely on airports to accommoda
and parents. The airport brings university-related visitors to the area, as well as supporting the travel
airport contributes to the success of higher education in the Bemidji area.

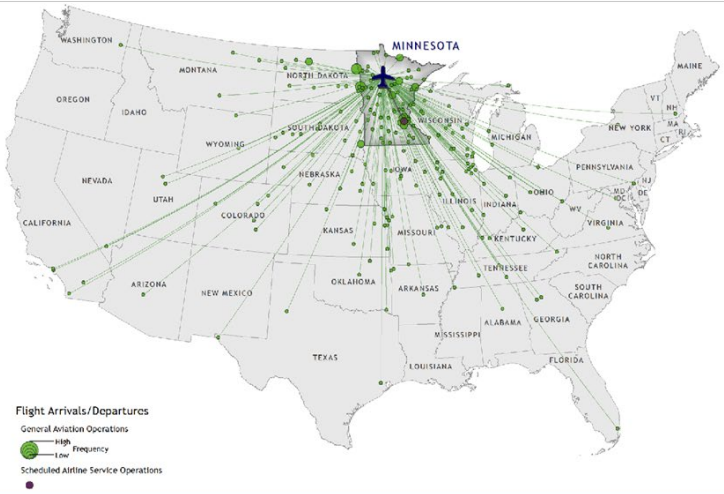
Recreation

Bemidji has numerous outdoor recreational activities, including hunting and fishing. There are more than 50
100 miles of cross-country ski trails near Bemidji, as well as over 400 fishing lakes within 25 miles, making th
Each year, Minnesota hosts an estimated 477,000 hunting trips, which supports an estimated 12,400 jobs
of $417 million. The American Sportfishing Association estimates 260,000 visitors come to Minnesota
estimated $400 million on fishing-related activities. By supporting hunters and anglers who fly into the area
businesses engaged in recreational activities.

BEMIDJI REGIONAL AIRPORT SUPPORTS NON-STOP DAILY CONNECTIVITY TO MANY DESTINATIONS THROUGHOUT THE LOWER 48 STATES.

A flight from this airport can take you almost anywhere. This connectivity is particularly important for the many businesses that rely on Minnesota's airports to deliver and receive products, reach their customers, and remain competitive.

Flight data from the FAA shown on this map displays just some of the destinations flown to and from this airport.



MINNESOTA AIRPORTS SUPPORTING OUR ECONOMY & COMMUNITIES

Case Example: North Carolina

Legislative Mandate

(c) Economic Impact Study and Distribution Formula. – The Department of Transportation ***shall conduct a biennial economic impact study*** *that examines the annual economic impact of each commercial service airport in North Carolina. The Department shall* ***disburse AIP funds appropriated in a year to each eligible airport in proportion to the total economic impact of the airport****, adjusted as provided in this subsection:*

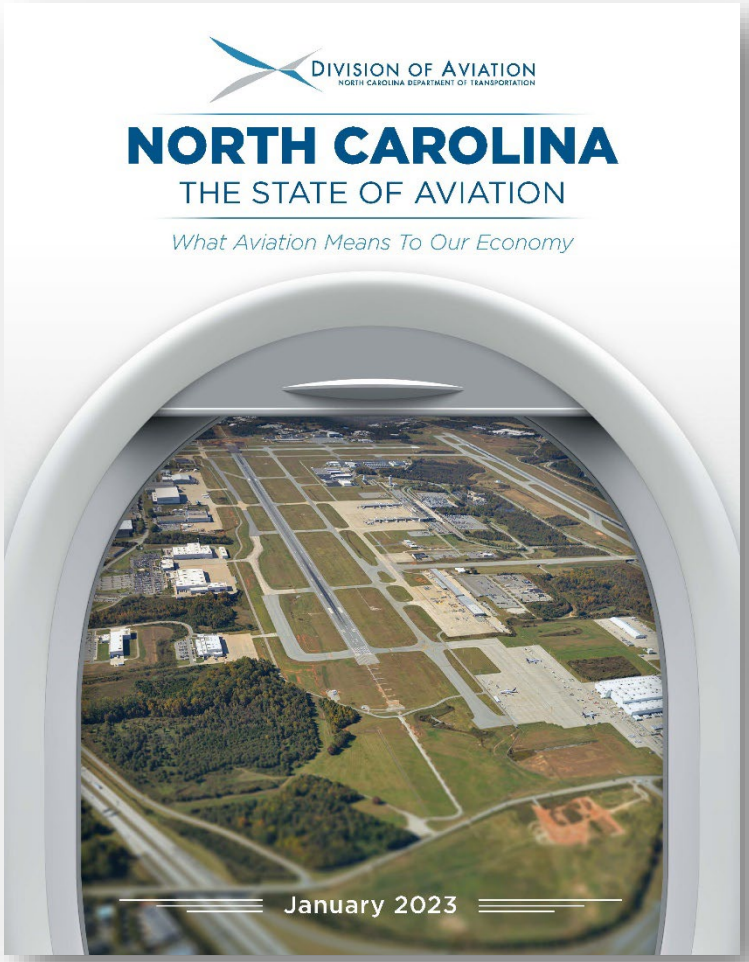
(1) For an eligible airport with one of the three largest economic impacts, the airport's distribution amount shall be reduced by a percentage equal to the lesser of twenty percent (20%) or five percent (5%) multiplied by each full ten percent (10%) of economic impact calculated for that airport. The aggregate amount of the reduction to the eligible airports with the three largest economic impacts is the amount to be redistributed to the remaining eligible airports as provided in subdivision (2) of this subsection.

(2) For an eligible airport that does not have one of the three largest economic impacts, the airport's distribution amount shall be increased based upon the following formula:

a. Twenty-five percent (25%) of the redistribution amount shall be distributed equally.

b. Seventy-five percent (75%) of the redistribution amount shall be based upon the airport's share of passenger boardings compared to the total number of passenger boardings used for all airports receiving a distribution pursuant to this subdivision

Case Example: North Carolina



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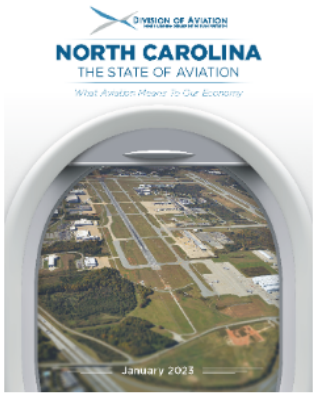
Case Study: North Carolina

Case Study: North Carolina

Tracking the Reach of the Study

2023 State of Aviation Outreach Dashboard (View Only) ⋮ smartsheet Report Abuse Help



North Carolina: The State of Aviation 2023
Outreach Campaign Dashboard

SPREAD THE WORD: $72B Billion Annual Impact

Follow the link below to track your outreach results:

1. Enter **each presentation** you make on your impacts.
2. Enter **each published story** (newspaper, TV, newsletter, etc.) that publicizes your impacts.

Submit a presentation or published story >

Results to Date

Presentations

35

Stakeholders Reached

1911

Published Stories

49

Quicklinks

Aviation Website with Brochure and Video >

Outreach Toolkit on State Aid Connect site >

Presentations

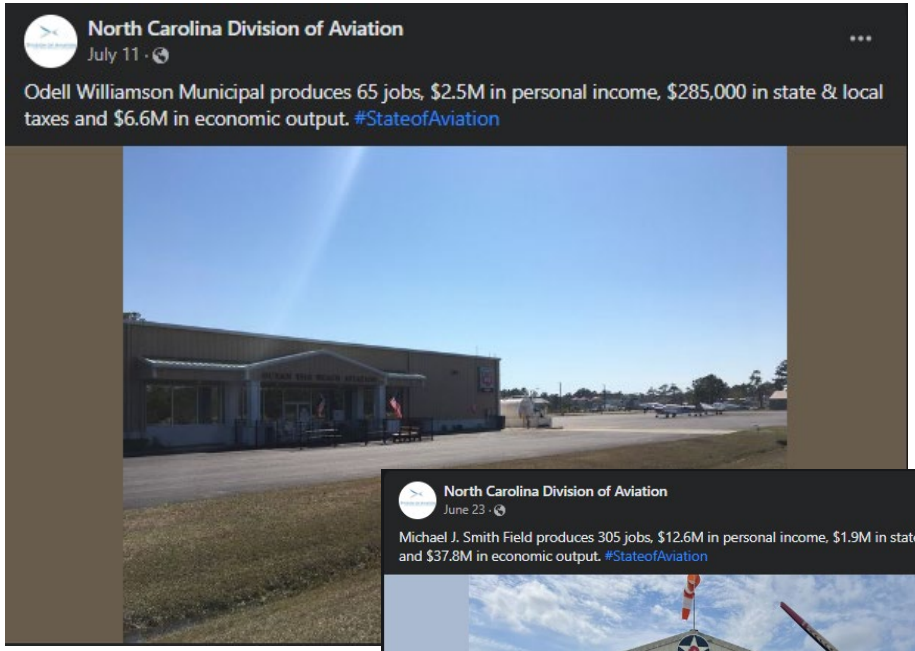
Organization	Date of Presentation	Est Size of Audience	Group Presented To
RUQ	07/11/23	60	Salisbury Rotary
Davidson County Airport	05/31/23	50	Thomasville NC Rotary Club
NCDOT Aviation	05/18/23	63	Apex Academy of Information Technology (AOIT)

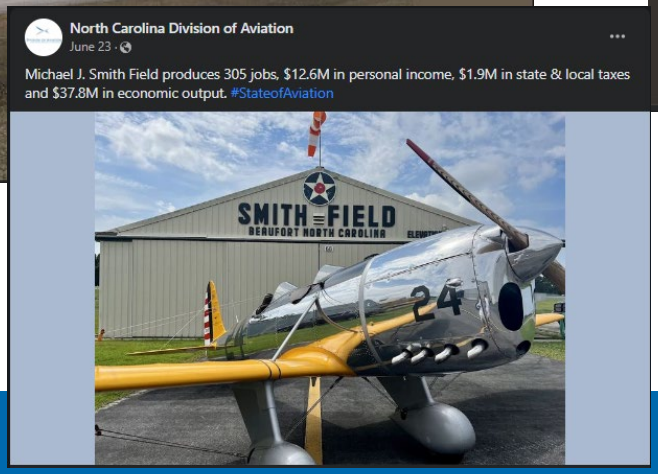
Published Stories

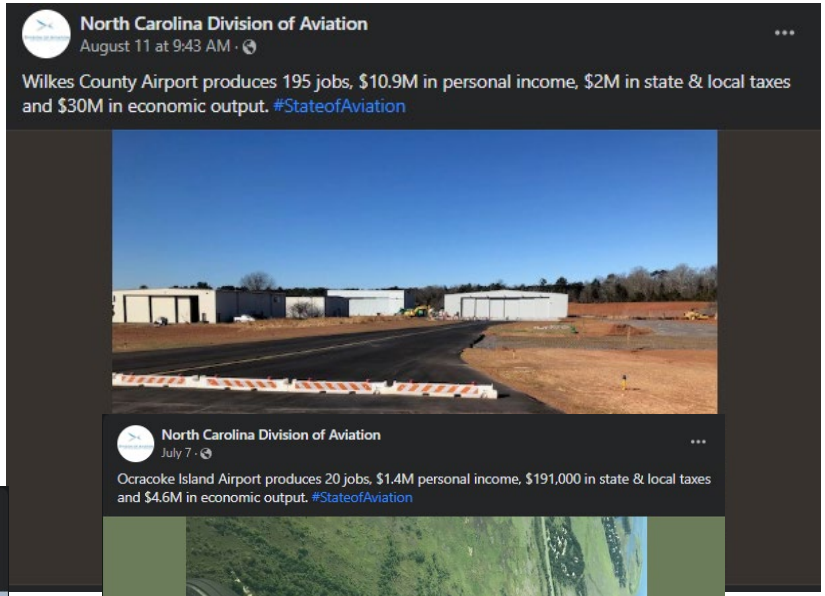
Organization	Date Story Ran/Aired/Was Distributed	Who Published	URL to the Story Online
Albert J Ellis Airport	04/26/23	Jacksonville Daily News- local paper	https://www.jdnews.com/n
Pitt Greenville Airport	02/23/23	The Daily Reflector	https://www.reflector.com/
Raleigh Executive Jetport	02/08/23	Sanford Herald	https://www.sanfordherald

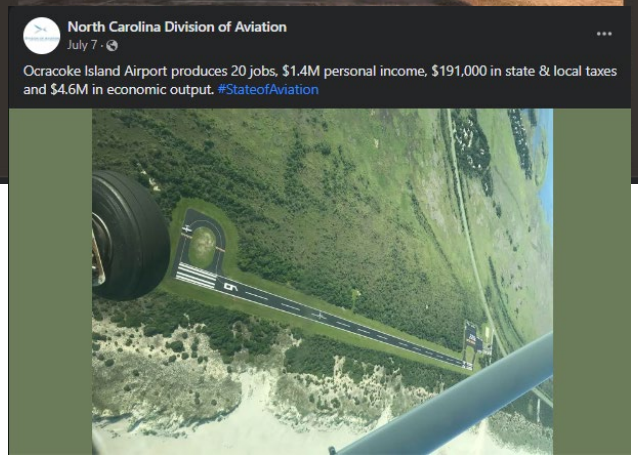
Case Study: North Carolina

Social Media Engagement



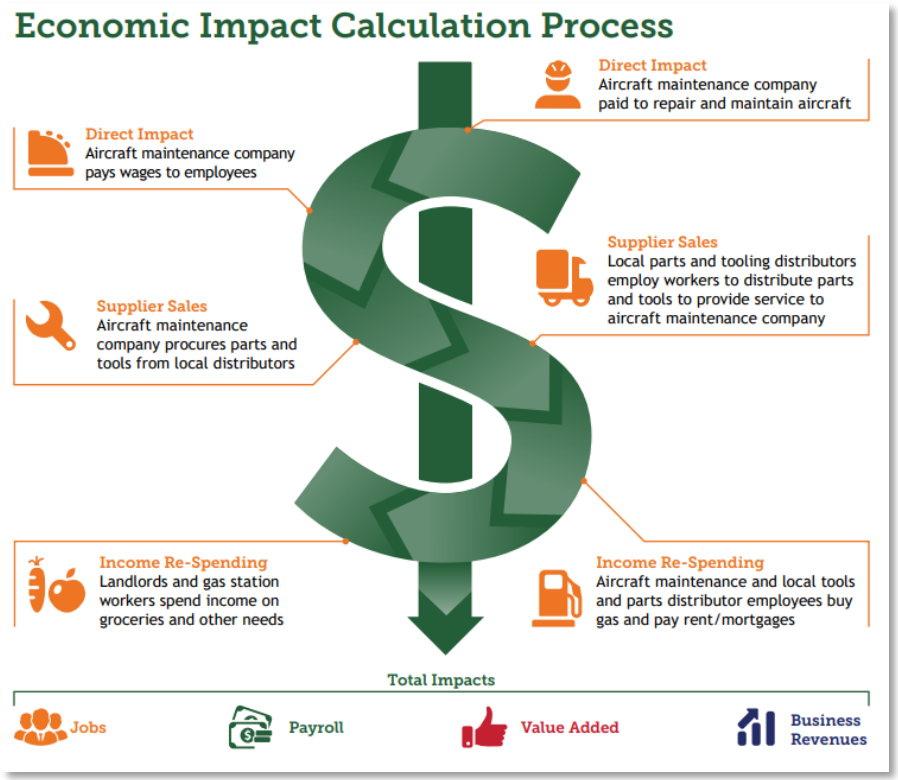






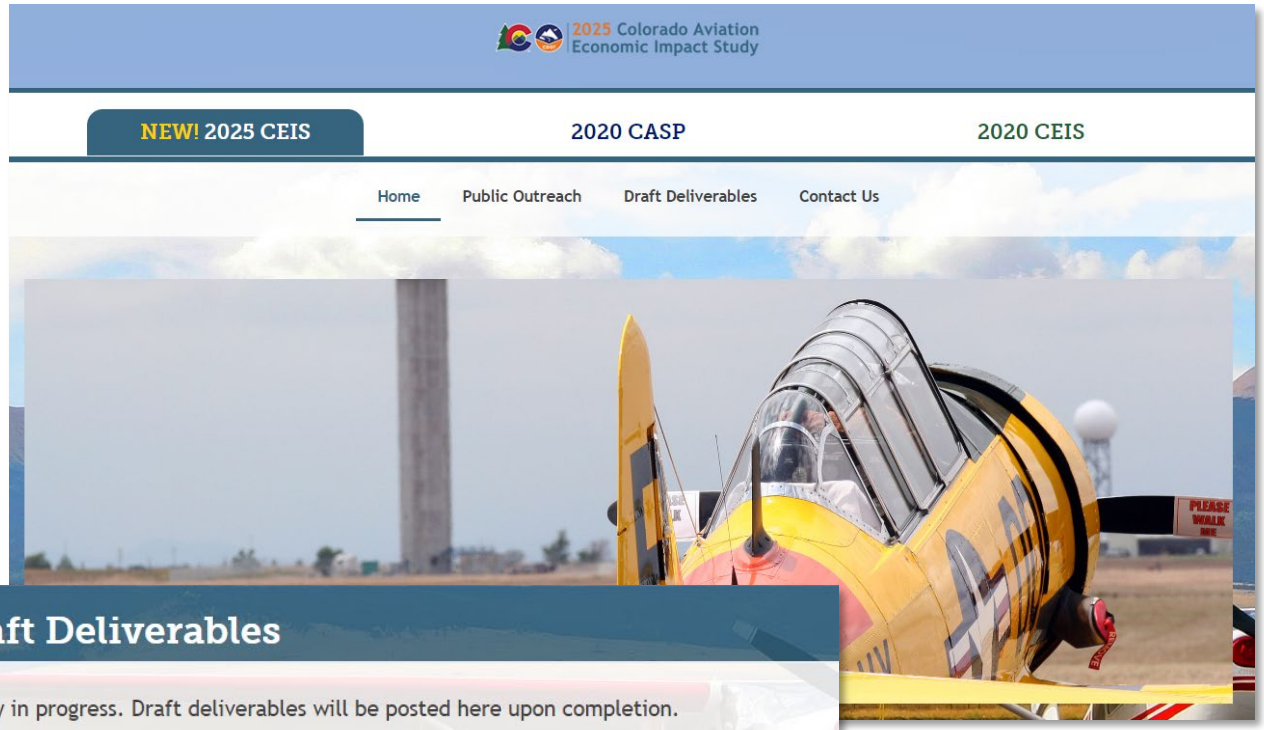
Case Study: Colorado

Infographics



Case Study: Colorado

Project Website



Draft Deliverables

The 2025 Colorado Economic Impact Study (CEIS) is currently in progress. Draft deliverables will be posted here upon completion.

- Technical Report
- Statewide Executive Summary Brochure
- Statewide Fact Sheet
- Individual Airport Brochures
- Individual Airport PowerPoint Presentations
- Animated Flight Maps
- Airport Training Webinar

Case Study: Colorado

Animated Flight Maps

Case Study: Colorado

Real Life Stories

Case Study: Colorado

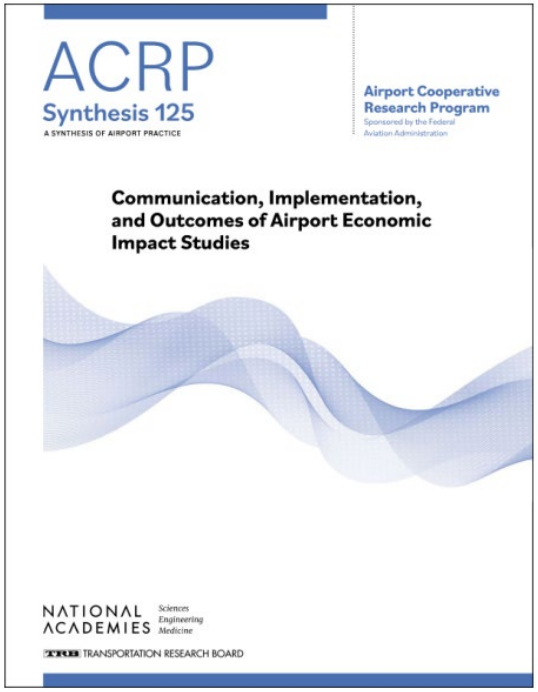
Unique Airport Videos

Case Study: Colorado

Summary of Findings

- AEISs are becoming more common place at airport, region, and state level.
- Communicated and implemented across a variety of media and venues
  - Traditional deliverables are still heavily used
  - Web-based products are on the rise
- Important to select dissemination method based on intended audience and message
  - Most valuable when developed to be public facing

FOR ADDITIONAL INFORMATION



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Report available here:
https://nap.nationalacademies.org/catalog/27227/communication-implementation-and-outcomes-of-airport-economic-impact-studies

Scan for the Report

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Expect More. Experience Better.

Other Events for You:

October 22, 2024

TRB Webinar: Military Resources and Strategies to Improve Civilian Airport Resiliency

October 24, 2024

TRB Webinar: Developing a Culture of Innovation in Airports

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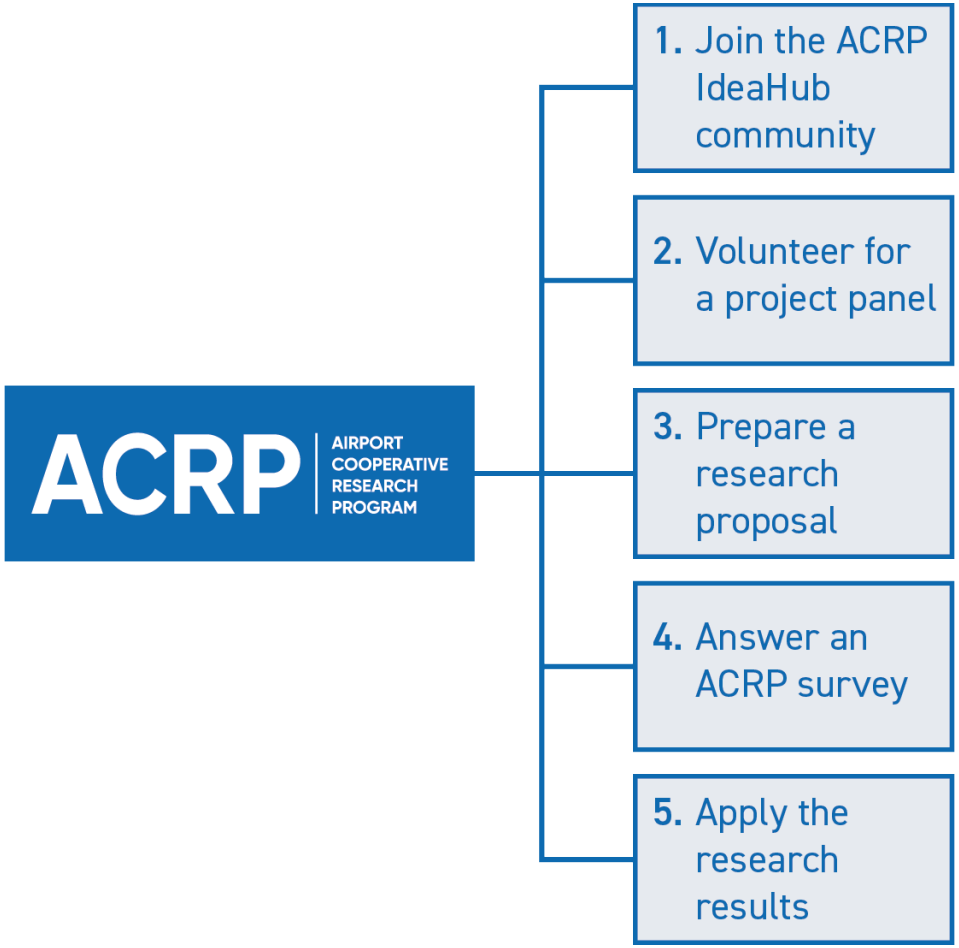
Get involved with ACRP



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