



TEXAS AVIATION

Economic Impact Study

AUGUST 2018



PURPOSE AND NEED

Purpose

- Tally the economic impacts of Texas system airports
- Key component of TxDOT's overall planning efforts
 - Airport system planning
 - Aviation Capital Improvement Program

Need

- Quantify airport economic impacts last done in 2011
- Demonstrate value of TxDOT's annual \$70 million investment in airports

AIRPORT SYSTEM ECONOMIC IMPACTS

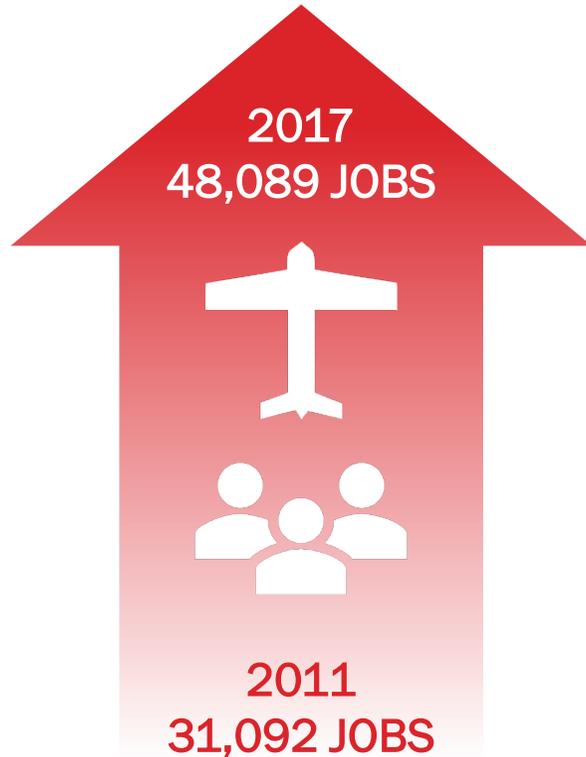


Impact Type

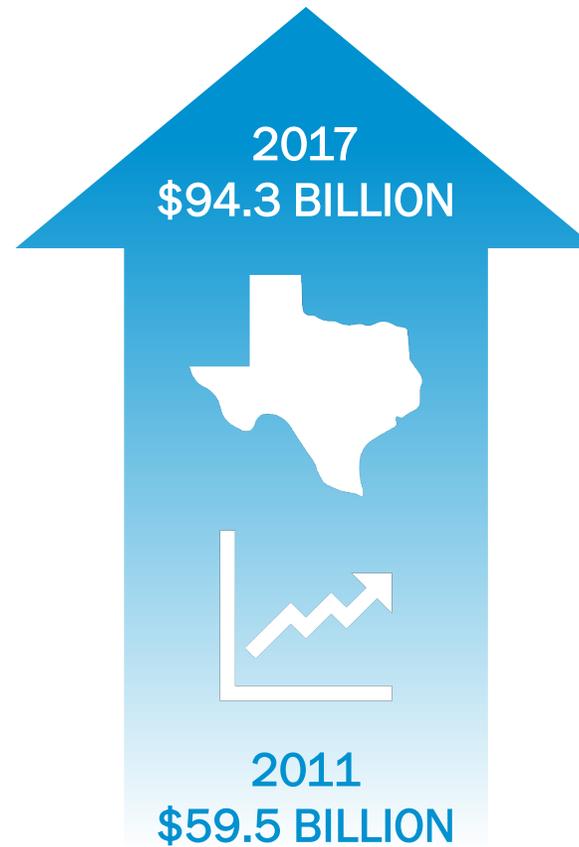
Direct	490,404	\$17.5 billion	\$49.2 billion
Multiplier	288,551	\$12.6 billion	\$45.1 billion
Total	778,955	\$30.1 billion	\$94.3 billion

IMPROVEMENTS SINCE 2011

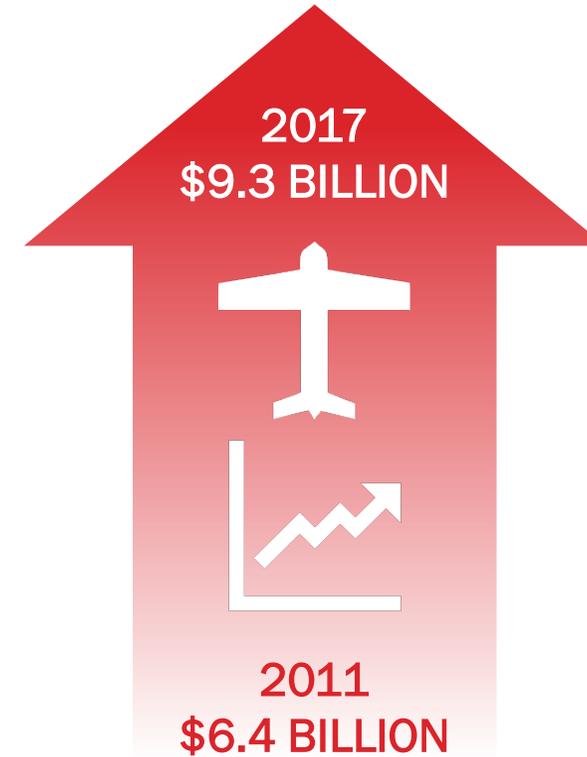
54%
GENERAL AVIATION
EMPLOYMENT GROWTH



58%
TEXAS SYSTEM TOTAL
OUTPUT GROWTH

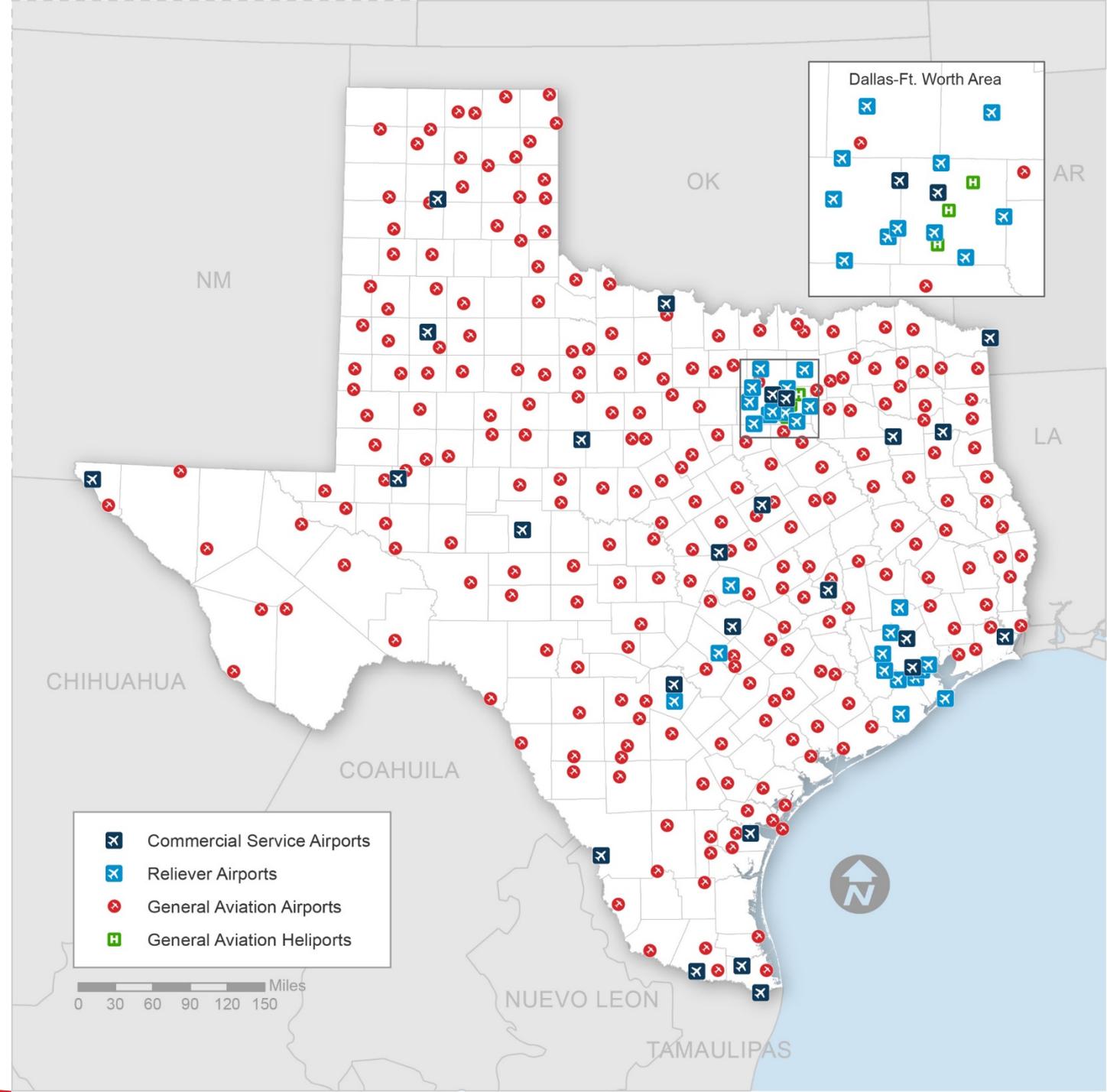


47%
GENERAL AVIATION
OUTPUT GROWTH

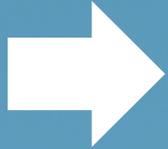


TEXAS AIRPORT SYSTEM

- 289 airports
- 25 commercial service airports
- 80 million enplanements
- 1.9 million commercial operations
- 264 general aviation airports
- 5.7 million general aviation operations



ECONOMIC IMPACT STUDY BACKGROUND



STUDY BEGAN
AUGUST 2017



SNAPSHOT OF
TEXAS AIRPORT
IMPACTS IN 2017



FOLLOWED FAA
GUIDELINES



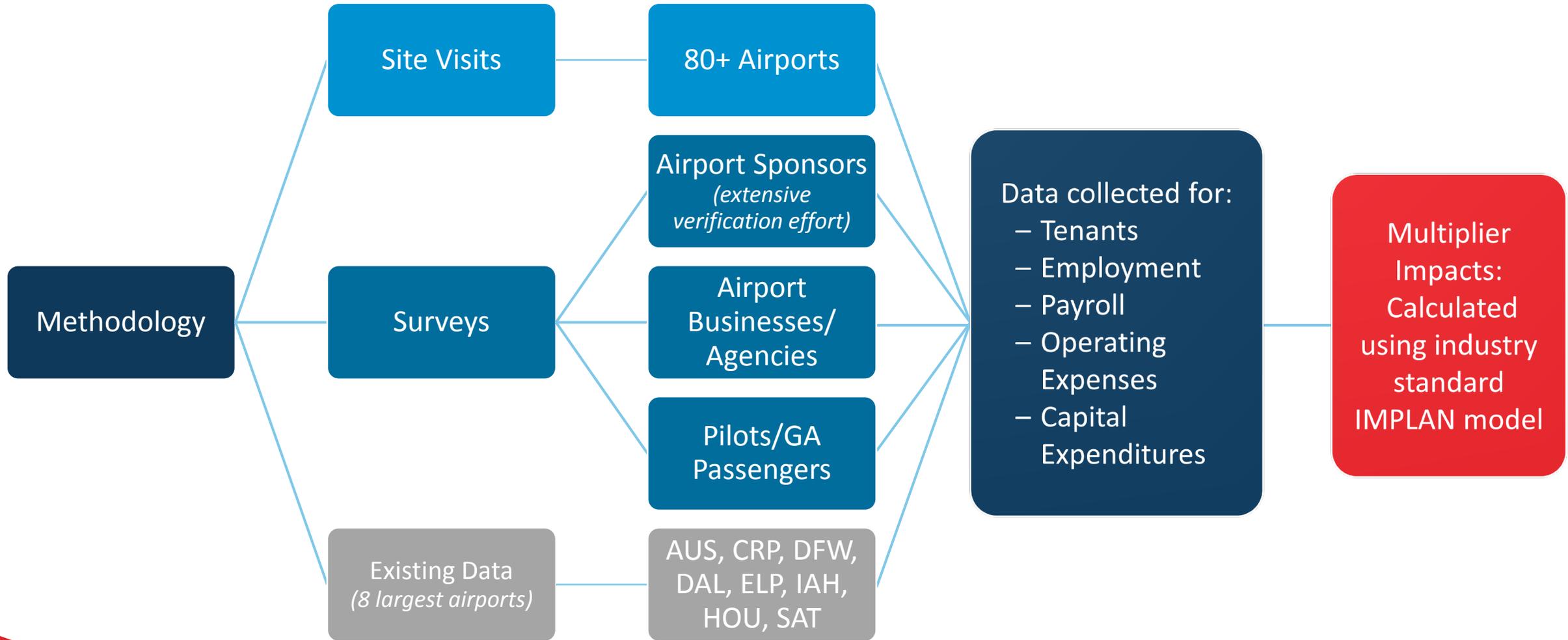
QUANTIFIED
IMPACTS BY
AIRPORT AND FOR
STATE



SHOWED
IMPROVEMENTS
COMPARED TO
2011 STUDY



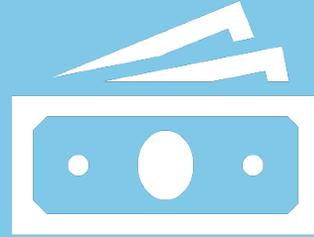
METHODOLOGY



ECONOMIC IMPACT MEASURES



EMPLOYMENT



PAYROLL



OUTPUT



ECONOMIC IMPACT CATEGORIES



Capital Improvement



On-Airport



Visitor Expenditures



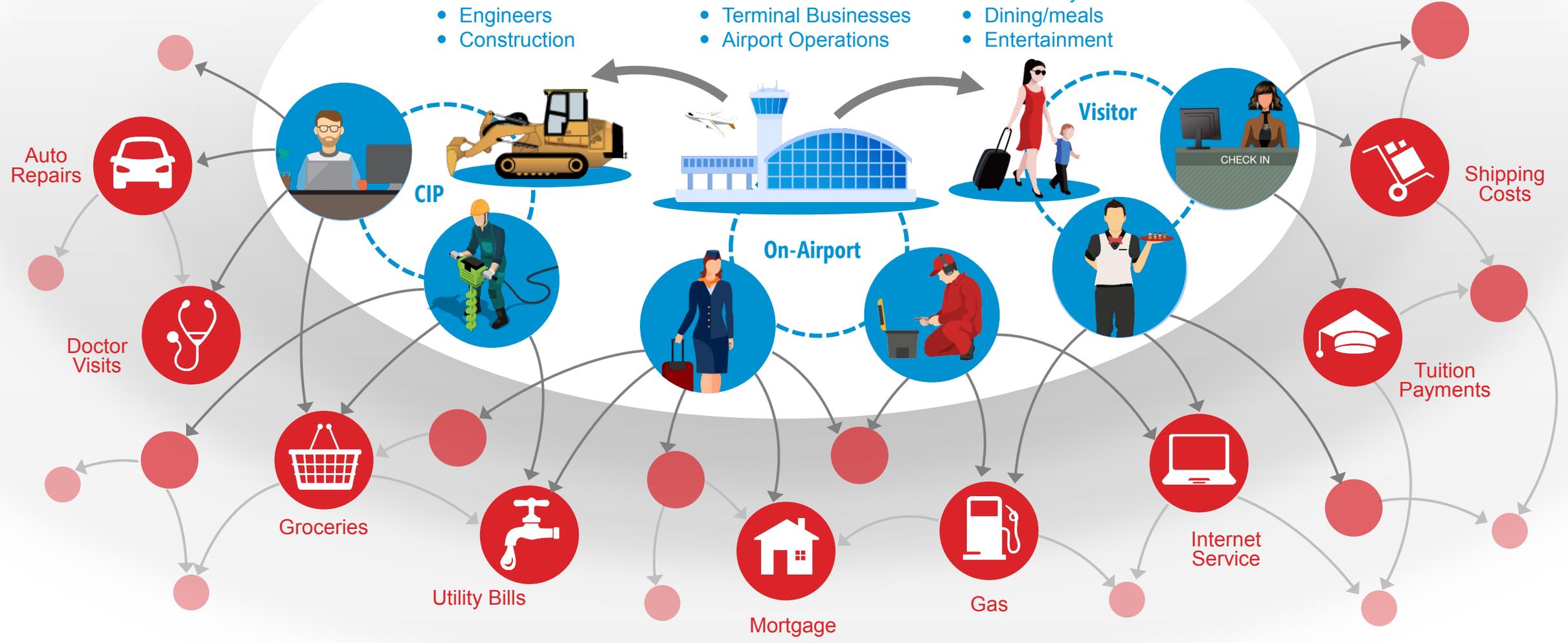
ECONOMIC IMPACT MODEL

 +  = Total Impacts

Multiplier Impacts

Direct Impacts

- Capital Improvements**
 - Consultants
 - Engineers
 - Construction
- On-Airport Impacts**
 - Airlines
 - Terminal Businesses
 - Airport Operations
- Visitor Impacts**
 - Hotel Stay
 - Dining/meals
 - Entertainment



ON-AIRPORT IMPACTS

Includes:

- Businesses (e.g., FBOs, flight schools, repair shops, terminal concessionaires, rental car agencies, and airlines)
- Government agencies (e.g., airport sponsors, FAA, and TSA)
- Multiplier impacts



Total Employment	263,733
Total Payroll	\$14.7 BILLION
Total Output	\$53.4 BILLION



VISITOR EXPENDITURE IMPACTS

Includes:

- Commercial service visitors
- General aviation visitors
- Multiplier impacts



Total Employment	497,516
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Total Payroll	\$14.8 BILLION
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Total Output	\$38.0 BILLION
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CAPITAL IMPROVEMENT IMPACTS

Includes:

- Airfield projects
- Terminal renovation and construction
- Tenant improvements
- Multiplier impacts



Total Employment	17,706
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Total Payroll	\$591.1 MILLION
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Total Output	\$2.9 BILLION
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OTHER BENEFITS



Life saving air
ambulance flights



Agriculture
enhancement



More efficient pipeline
inspections



Improved wildfire
protection and
suppression



Better community
security through law
enforcement flights

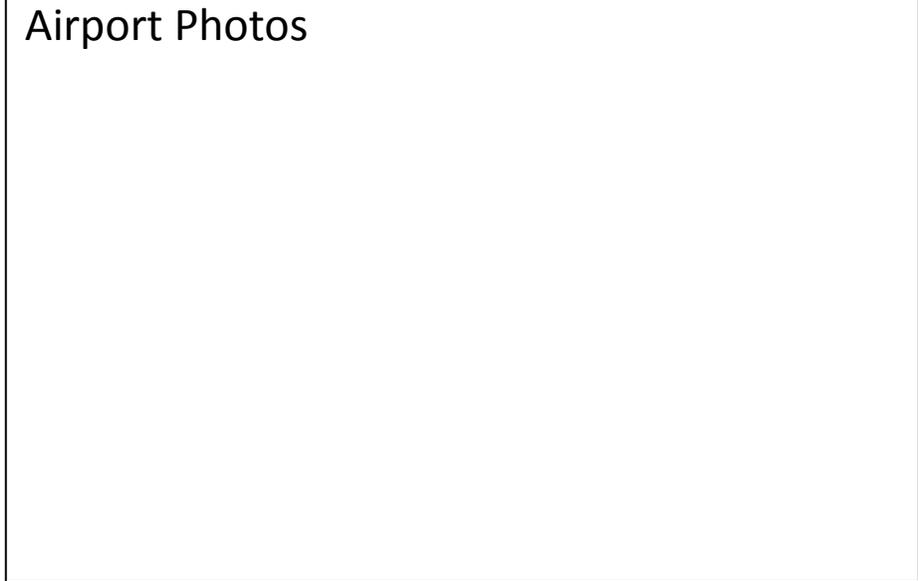


Greater medical
coverage by
physicians using
aircraft

XYZ AIRPORT OVERVIEW

- Airport background
- Airport facilities
- Airport services
- Unique aspects of airport

Airport Photos



XYZ AIRPORT



Impact Type

Direct	XX	\$XX million	\$XX million
Multiplier	XX	\$XX million	\$XX million
Total	XX	\$XX million	\$XX million



THANK YOU

MARSHALL, TEXAS

**CDM
Smith**