### 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

<table>
<thead>
<tr>
<th>Impact Type</th>
<th>Employment</th>
<th>Payroll</th>
<th>Output</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct</td>
<td>490,404</td>
<td>$17.5 billion</td>
<td>$49.2 billion</td>
</tr>
<tr>
<td>Multiplier</td>
<td>288,551</td>
<td>$12.6 billion</td>
<td>$45.1 billion</td>
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<tr>
<td>Total</td>
<td>778,955</td>
<td>$30.1 billion</td>
<td>$94.3 billion</td>
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</tbody>
</table>
IMPROVEMENTS SINCE 2011

54% GENERAL AVIATION EMPLOYMENT GROWTH

2011 31,092 JOBS
2017 48,089 JOBS

58% TEXAS SYSTEM TOTAL OUTPUT GROWTH

2011 $59.5 BILLION
2017 $94.3 BILLION

47% GENERAL AVIATION OUTPUT GROWTH

2011 $6.4 BILLION
2017 $9.3 BILLION
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

- Site Visits
- 80+ Airports
- Airport Sponsors
  (extensive verification effort)
- Airport Businesses/Agencies
- Pilots/GA Passengers
- Existing Data
  (8 largest airports)
- AUS, CRP, DFW, DAL, ELP, IAH, HOU, SAT

Data collected for:
- Tenants
- Employment
- Payroll
- Operating Expenses
- Capital Expenditures

Multiplier Impacts:
Calculated using industry standard IMPLAN model
ECONOMIC IMPACT MEASURES

- EMPLOYMENT
- PAYROLL
- OUTPUT
ECONOMIC IMPACT CATEGORIES

- Capital Improvement
- On-Airport
- Visitor Expenditures
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
Total Payroll: $14.8 BILLION
Total Output: $38.0 BILLION
CAPITAL IMPROVEMENT IMPACTS

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

<table>
<thead>
<tr>
<th>Total Employment</th>
<th>17,706</th>
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</thead>
<tbody>
<tr>
<td>Total Payroll</td>
<td>$591.1 MILLION</td>
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<tr>
<td>Total Output</td>
<td>$2.9 BILLION</td>
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</tbody>
</table>
OTHER BENEFITS

- Life saving air ambulance flights
- Agriculture enhancement
- Improved wildfire protection and suppression
- More efficient pipeline inspections
- 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
### Impact Type

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<tr>
<td>Direct</td>
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<td>$XX million</td>
<td>$XX million</td>
</tr>
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<td>$XX million</td>
<td>$XX million</td>
</tr>
<tr>
<td>Total</td>
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<td>$XX million</td>
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THANK YOU