

# Virginia Airport Economic Impact Study

Introduction Webinar





# Agenda

**Study Purpose  
and Benefits**

**01**

**Project  
Process**

**02**

**Data  
Collection**

**03**

**Anticipated  
Deliverables**

**04**

# Study Purpose and Benefits



# Study Purpose and Benefits

- **Understand the overall role of aviation in supporting and enhancing the Commonwealth's economy**
- **Convey the economic importance of airports and the benefits to Virginia's residence, businesses, and visitors**



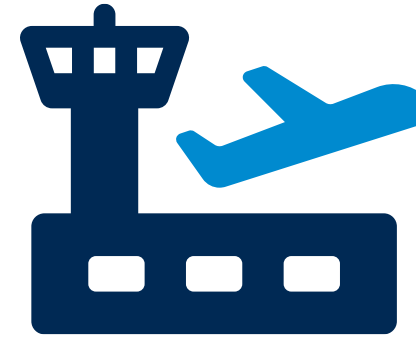


# Study Value to Airports



STATE legislators

LOCAL communities, airport  
sponsors, and other stakeholders



Airports of  
all sizes

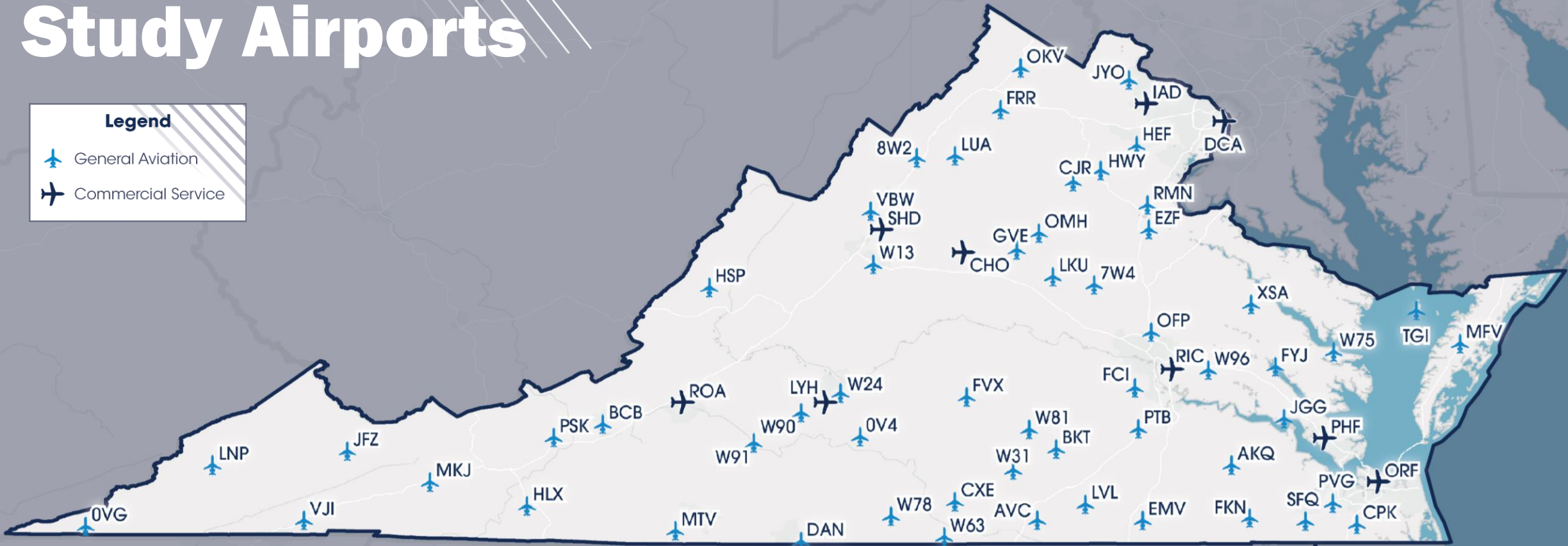




# Study Airports

**Legend**

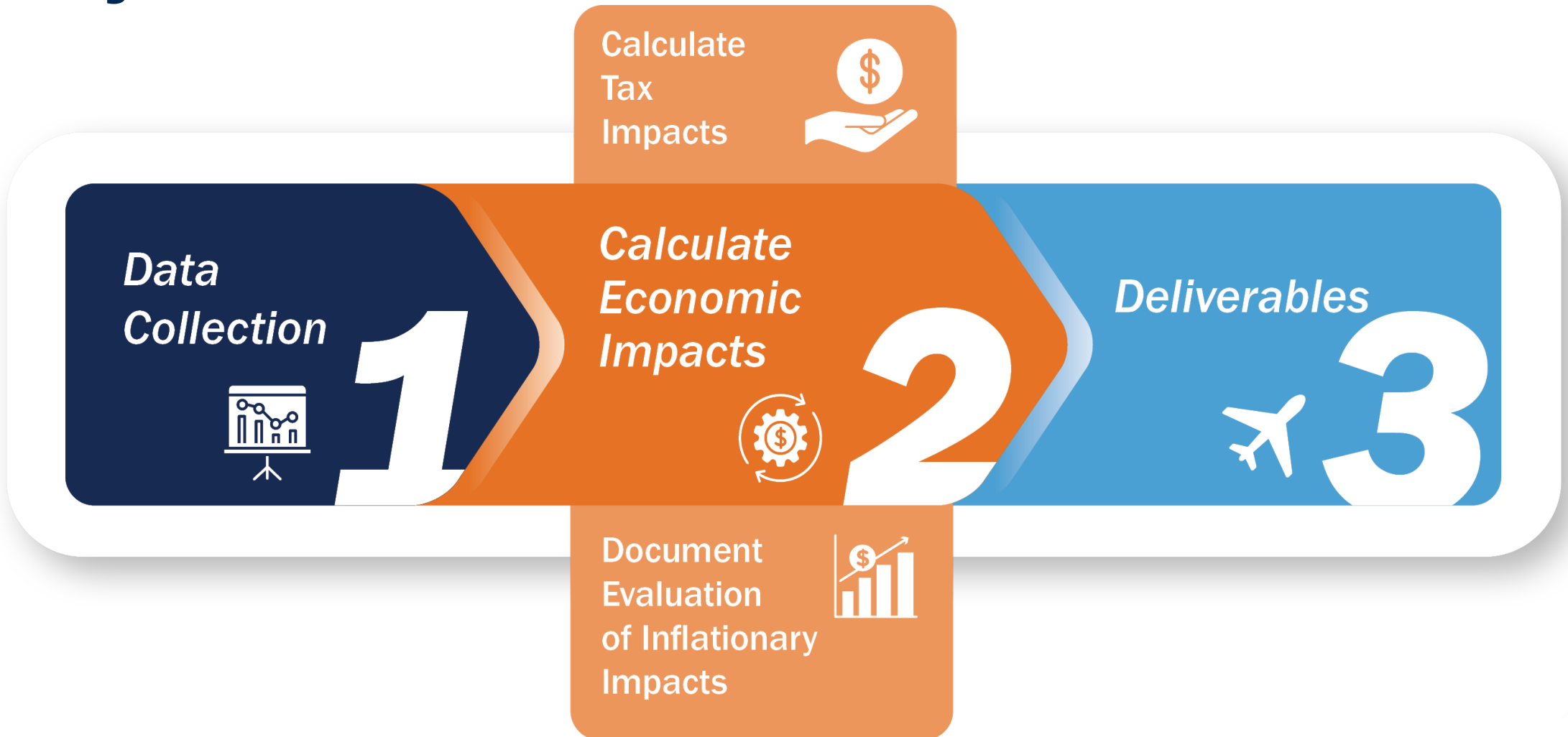
-  General Aviation
-  Commercial Service



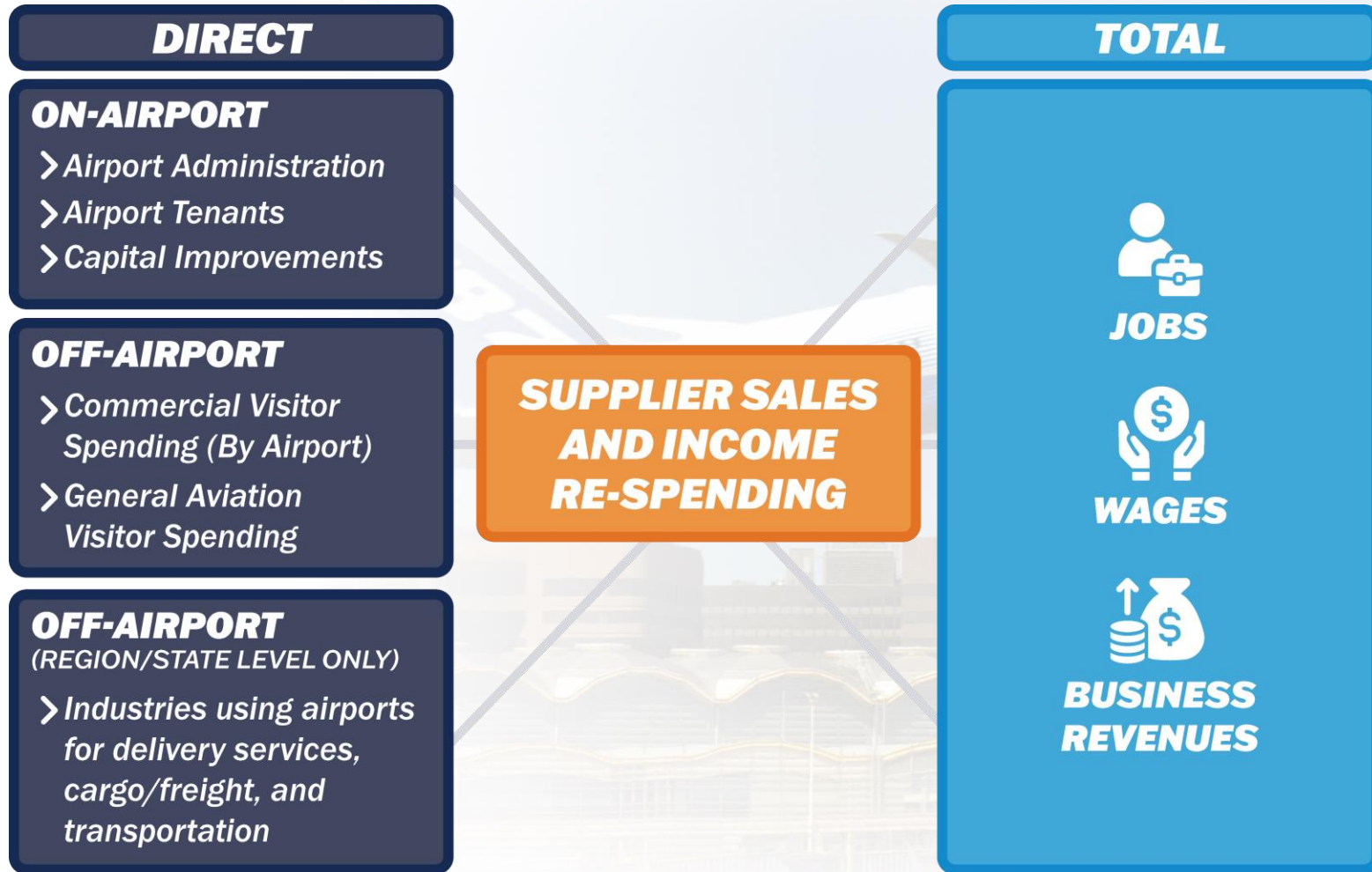
# Project Process



# Project Process







# IMPLAN



**Based on Employee Headcount**



**Economic Modeling Software**



**Generates Direct, Multiplier, and Total Impacts**



**FAA-Approved**





# Data Collection:

## How are we going to collect these data?



# Surveys

*Airport  
Manager  
Survey*

*Airport  
Administration*

*Airport  
Business  
Tenant Survey*

*Airport  
Tenants  
(MRO, restaurant,  
etc.)*

*Surface  
Transportation  
Provider*

*Air  
Cargo*

*Commercial  
Visitor  
Survey*

*Commercial  
Visitors*

*GA  
Visitor  
Survey*

*GA  
Visitors*

*Off Airport  
Reliance  
Survey*

*Off Airport  
Reliance*



# On-Airport Impacts



## Airport Administration – All of You!

- Airport operations, management, activity, and budget
- May include facility and grounds maintenance and other administrative needs (including city or county staff that support the airport).

**AIRPORT MANAGER SURVEY**

The information provided in this Airport Manager Survey will be used by our consultant team to quantify your airport's economic impacts, as well as the economic impacts for the for the Commonwealth of Virginia.

Note that we are requesting information for Calendar Year (CY) 2024.

If you have any questions regarding the Virginia Airport System Economic Impact Study project, please contact:

Tom Gibson, Kimley-Horn  
Phone: +1(703) 674-1367  
Email: Thomas.Gibson@kimley-horn.com

Stephen Smiley, Virginia Department of Aviation  
Phone: +1(804) 236-3627  
Email: Stephen.Smiley@doav.virginia.gov

Your time and attention are greatly appreciated. Thank you.

Name of Airport: \_\_\_\_\_ 3-letter FAA ID: \_\_\_\_\_ Date: \_\_\_\_\_

Does your airport have a dedicated on-site Airport Manager?  
If yes, please provide their contact information. If no, please provide the contact information for the best available contact for the airport (e.g. public works director, FBO manager, etc.)

Yes  No

Name: \_\_\_\_\_ Title: \_\_\_\_\_  
Phone: \_\_\_\_\_ Cell/Alternative Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

Survey Respondent: This data request was completed by:

Name: \_\_\_\_\_ Title: \_\_\_\_\_  
Phone: \_\_\_\_\_ Cell/Alternative Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

Other Airport Contact:  
Please provide contact information for any other airport representative that may be of assistance in collecting data for your airport (e.g. elected officials or airport board members):

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Email: \_\_\_\_\_

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# On-Airport Impacts



## Airport Tenants

- Airlines, FBOs, MROs, avionics, and other aircraft service companies
- Terminal concessions (e.g., restaurants and retailers)
- On-airport businesses that pay rent or fees (e.g., warehouses and hotels)
- May include:
  - Surface transportation providers (e.g., TNCs and taxis)
  - Air cargo operators

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Stephen Smiley, Virginia Department of Aviation  
Phone: +1(804) 236 3627  
Email: Stephen.Smiley@doav.virginia.gov

**Business/Company Information**

Business Name: \_\_\_\_\_  
 Airport: \_\_\_\_\_  
 Contact Name: \_\_\_\_\_  
 Phone Number: \_\_\_\_\_  
 Email: \_\_\_\_\_

**Type of Business**

What industry is your business in? Please check only one.

<input type="checkbox"/> Air Transportation	<input type="checkbox"/> Local/Regional Government
<input type="checkbox"/> Fixed-Base Operator (FBO)	<input type="checkbox"/> Military
<input type="checkbox"/> Wholesale Distribution	<input type="checkbox"/> Other Federal Government (not military or TSA)
<input type="checkbox"/> FAA	<input type="checkbox"/> Security (TSA or other)
<input type="checkbox"/> Retail	<input type="checkbox"/> Aerial Applicator
<input type="checkbox"/> Car Rental	<input type="checkbox"/> Aviation-Related Manufacturing and/or Repair
<input type="checkbox"/> Hotel (on airport)	<input type="checkbox"/> Facility Maintenance (buildings)
<input type="checkbox"/> Flight Training	<input type="checkbox"/> Concession (restaurant, bar, etc.)
<input type="checkbox"/> Construction	<input type="checkbox"/> Ground Transportation (other than car rental)
<input type="checkbox"/> Grounds Maintenance	<input type="checkbox"/> Courier/Overnight Delivery Service
<input type="checkbox"/> Other (please specify)	

PAGE 1 OF 2

**AIRPORT TENANT SURVEY**

2023 \$ \_\_\_\_\_ 2024 \$ \_\_\_\_\_

PAGE 2 OF 2

THANK YOU FOR YOUR ASSISTANCE!

# On-Airport Impacts



## Capital Improvements

- Construction of airside and landside facilities over the last four years
- Expenditures include airport, federal, state, and other funds, as well as tenant expenditures
- Total improvements over the last four years are averaged to represent an “average year”
- Construction expenditures by tenants (e.g., rental space buildouts, hangars built on leased airport property, etc.)

The image shows a stack of 'AIRPORT MANAGER SURVEY' forms. The top form is clearly visible and contains the following text:

**VIRGINIA AIRPORT SYSTEM ECONOMIC IMPACT STUDY**

**AIRPORT MANAGER SURVEY**

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If yes, please provide their contact information. If no, please provide the contact information for the best available contact for the airport (e.g., public works director, FBO manager, etc.)

Yes  No

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PAGE 1 OF 4

# Off-Airport Impacts



## Out-of-State Visitor Spending (Commercial and GA)

- Spending estimates determined through out-of-state visitor surveys and third parties (e.g., tourism agencies)
- Important to not duplicate impacts between on- and off-airport spending

**VIRGINIA AIRPORT SYSTEM** ECONOMIC IMPACT STUDY

**GENERAL AVIATION PILOT AND PASSENGER SURVEY**

If you would prefer to take the survey online and have the information automatically submitted to the project team, please follow the link [www.surveymonkey.com/#!/gpassengersurveyVA](http://www.surveymonkey.com/#!/gpassengersurveyVA) or scan the code on the right.

Are you visiting from out of state?	Are you traveling for:
Yes	Business
No	Personal
	Business and Personal

At what airport are you receiving this survey from?

How many people are traveling in your party?

How many nights did you spend in Virginia during this trip?

Approximately how much money did your party spend in each of the following categories during this trip? Please include only those expenditures made in Virginia outside of the airport.

Recreation - Outdoor Activities	Food and Beverage	Entertainment
\$	\$	\$
Lodging	Local Transportation (Uber, Lyft, car rental)	Retail
\$	\$	\$
Other (please specify)		
\$		

PAGE 1 OF 1

**THANK YOU FOR YOUR ASSISTANCE!**

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\$	\$	\$
Other (please specify)		
\$		

PAGE 1 OF 1

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# Off-Airport Impacts

## Business Reliance

- Measures how off-airport business rely on airports
- Businesses surveyed are identified by airport managers
- Conducted on statewide level only



**VIRGINIA**  
AIRPORT SYSTEM  
ECONOMIC IMPACT STUDY

**OFF-AIRPORT BUSINESS RELIANCE SURVEY**

**VIRGINIA OFF-AIRPORT BUSINESS RELIANCE SURVEY**

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Please take a few minutes to complete this survey and return it to Tom Gibson by email (Thomas.Gibson@kimley-horn.com) or if you would prefer to complete this survey online, please scan the QR code to the right or follow this link: [www.surveymonkey.com/r/VIAoff-airportbusiness](http://www.surveymonkey.com/r/VIAoff-airportbusiness)



**Business/Company Information**

Business Name: \_\_\_\_\_

Airport: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_

**Type of Business**

What is your business's primary product or service? (Select only one)

Administrative and support services	Professional, scientific, and technical services
Agriculture, forestry, fishing, and hunting	Real estate and rental and leasing
Arts, entertainment, and recreation	Restaurant, bar, and other food service
Construction	Retail trade
Digital and/or print information	Social assistance
Educational services	Transportation and warehousing
Finance and insurance	Utilities
Health care	Waste management and remediation services
Lodging	Wholesale trade
Manufacturing	Other services (except public administration)
Mining, quarrying, oil & gas extraction	Other (please specify)

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**PAGE 2 OF 2**

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Email: Thomas.Gibson@kimley-horn.com

Stephan Smiley, Virginia Department of Aviation  
Phone: +1 (804) 526-3627  
Email: Stephan.Smiley@doav.virginia.gov

My business activity is primarily based in a small airport. My business does not rely on Virginia's airports.

# Tax Impacts



- **Aviation related taxes come from the following sources:**
  - **State income tax paid by those whose jobs are supported by airports and visitor spending**
  - **Taxes contributed by airport businesses as available from data collection**
  - **Sales tax paid by those whose jobs are supported by airports and visitor spending**
  - **Sales tax paid by visitors (lodging/retail/rental cars/other)**

# Data Collection Process

**1**

Outreach to airports  
via phone and email to  
schedule a site visit

**2**

Airport receives  
calendar invite and  
surveys

**3**

Airport has a  
two-week window to  
complete surveys

**4**

Surveyor conducts  
site visit

**5**

Airport helps facilitate  
tenant interactions  
(as applicable)

**6**

Airport helps  
facilitate visitor  
spending surveys  
(as applicable)



**Emma Walker**



**Liam Sargent**



**Sonjia Murray**



**Zoe Lindermuth**



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**AIRPORT MANAGER SURVEY**

**Airport Employment**

How many full- and part-time employees were employed by your airport in 2024?  
Full-Time: \_\_\_\_\_  
Part-Time: \_\_\_\_\_

Note: Please only include those directly employed by the airport

Please categorize your airport's employees by occupation.  
Note: The figures entered below should sum to the same total as full-time and part-time employment listed at the top of this table.

	Occupation	Number of Employees (full-time)	Number of Employees (part-time)
General	Managerial/Supervisory		
	Clerical		
	Craft Trades (e.g., electrician)		
Retail Trades	Security (not TSA, CBP)		
	Food Service		
Other (please specify)	Retail (e.g., newsstand)		





**AIRPORT MANAGER SURVEY**

**Expenditures**

**Airport Payroll**

Total Payroll: \$ \_\_\_\_\_

If you are unable to answer the question above, please provide an estimate of the average annual wage/salary per employee (including overtime pay, commissions, allowances, and bonuses):

Average Full-Time Annual Salary/Wage per Employee:  
\$ \_\_\_\_\_

Average Part-Time Annual Salary/Wage per Employee:  
\$ \_\_\_\_\_

OR

<input type="radio"/> FT	<input type="radio"/> PT	less than \$20,000	<input type="radio"/> FT	<input type="radio"/> PT	\$60,000 - \$79,999
<input type="radio"/> FT	<input type="radio"/> PT	\$20,000 - \$39,999	<input type="radio"/> FT	<input type="radio"/> PT	\$80,000 - \$99,999
<input type="radio"/> FT	<input type="radio"/> PT	\$40,000 - \$59,999	<input type="radio"/> FT	<input type="radio"/> PT	more than \$100,000

**Airport Capital Expenditures**

Please estimate how much your airport spent on capital improvements in each year (include Federal, State and Local contributions).

	2021	2022	2023	2024
	\$ _____	\$ _____	\$ _____	\$ _____

What were the total annual wages and benefits paid to all employees employed at your airport in CY 2024? (Airport Operating Expenditures will equal the Total Operating Expenditures minus the previously calculated Capital Improvement, Payroll and Contracting expenditures)

Note: Total payroll includes gross (pre-tax) wages or salaries, including overtime pay, commissions, allowances, and bonuses.

**AIRPORT MANAGER SURVEY**

**Airport Activity**

Activity at Your Airport

Operations	Number of Operations in 2024	Percent Total Operations in 2024
<b>Total Operations in 2024 (Sum of Below)</b>	# of Ops: _____	100 %
<b>General Aviation</b>	# of Ops: _____	or _____ %
<b>Commercial Service</b>	# of Ops: _____	or _____ %
<b>Other (Military, Cargo, etc.)</b>	# of Ops: _____	or _____ %
How many of your airport's operations come from out of state? (Please note that this should be a percentage of all operations at the airport in 2024)	# of Ops: _____	or _____ %
Estimate the average number of passengers (including pilots) for each out-of-state GA operation at your airport.	Average # of Passengers per Transient Operation: _____	
Estimate the average number of nights visitors spent in VA between arrival and departure.	_____	
What is the purpose of travel for out-of-state visitors who arrive via GA?	<input type="checkbox"/> % business travel only <input type="checkbox"/> % personal travel only <input type="checkbox"/> % business and personal travel	
<p>Please provide any additional information about your airport that you feel is important to highlight and potentially use for the Commonwealth's airport economic impact study.</p>		

**THANK YOU FOR YOUR ASSISTANCE!**



# Anticipated Deliverables



# Anticipated Deliverables



**Technical  
Report**

---



**Statewide Executive  
Summary Brochure**

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**Airport Training  
Webinar**

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[Submit Photos](#)

# VIRGINIA AIRPORT SYSTEM ECONOMIC IMPACT STUDY

[Click here to access the airport manager introduction webinar recording!](#)

# Thank You ALL!



***Stephen Smiley***

*Department of Aviation*

☎ (804) 236 3627

✉ [Stephen.Smiley@doav.virginia.gov](mailto:Stephen.Smiley@doav.virginia.gov)



***Tom Gibson, C.M.***

*Kimley-Horn*

☎ (703) 674 1367

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