

Colorado Aviation System Plan (CASP) *and* Economic Impact Study (CEIS)



Colorado Aviation System Plan
and Economic Impact Study

Discussion Topics

- Introductions
- CASP Progress Update
- Preliminary CEIS Findings
- Questions/Feedback

Introductions

- CDOT Aeronautics
- EDR Group
- Kimley-Horn Team
- KRAMER aerotek





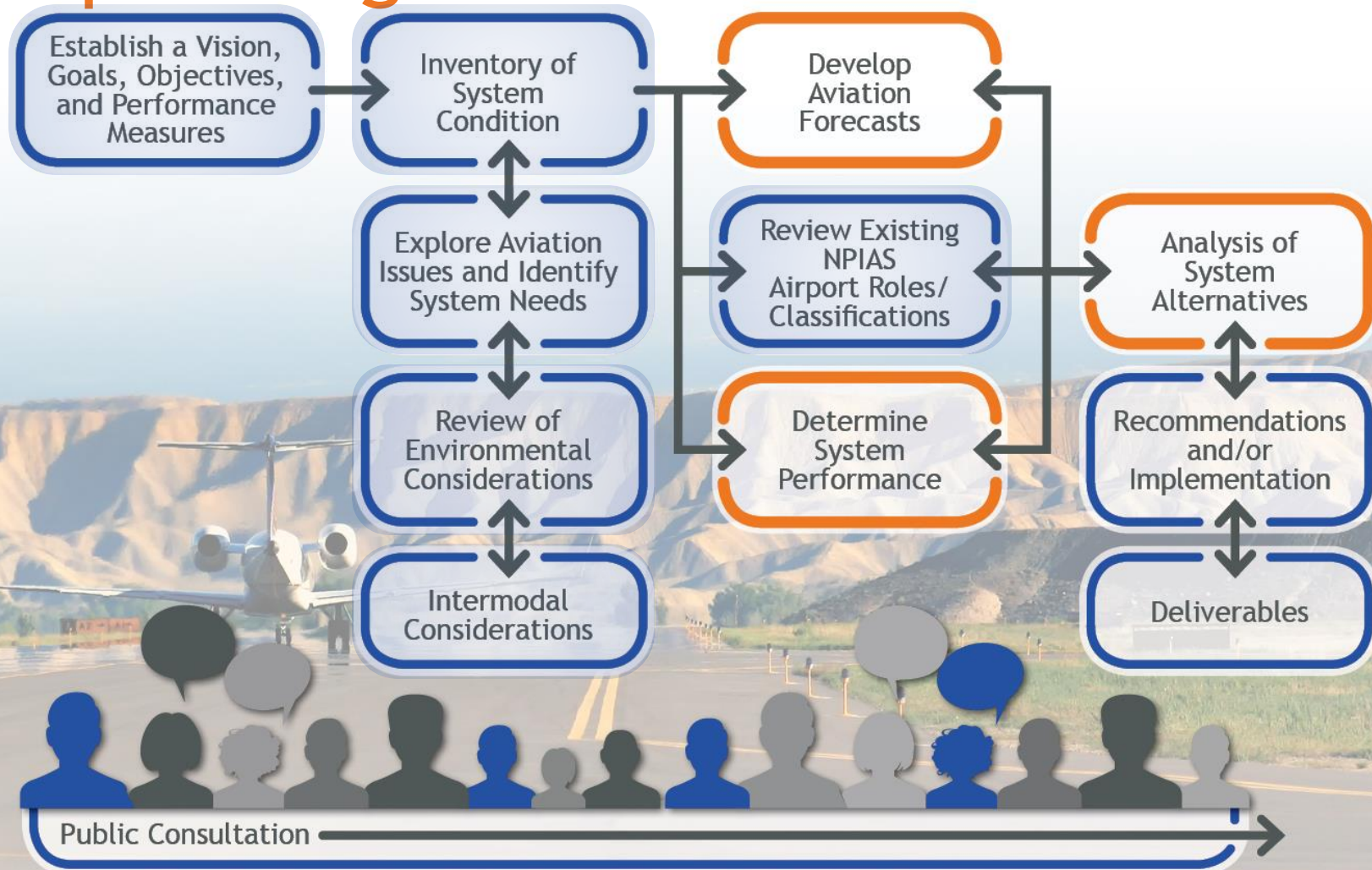
Colorado Aviation System Plan CASP

Project Progress

- Goals
- Data collection for CASP and CEIS
- Website
- In review:
 - Inventory chapter
 - Roles analysis
 - Issues
 - Environmental/ Intermodal



Upcoming Tasks

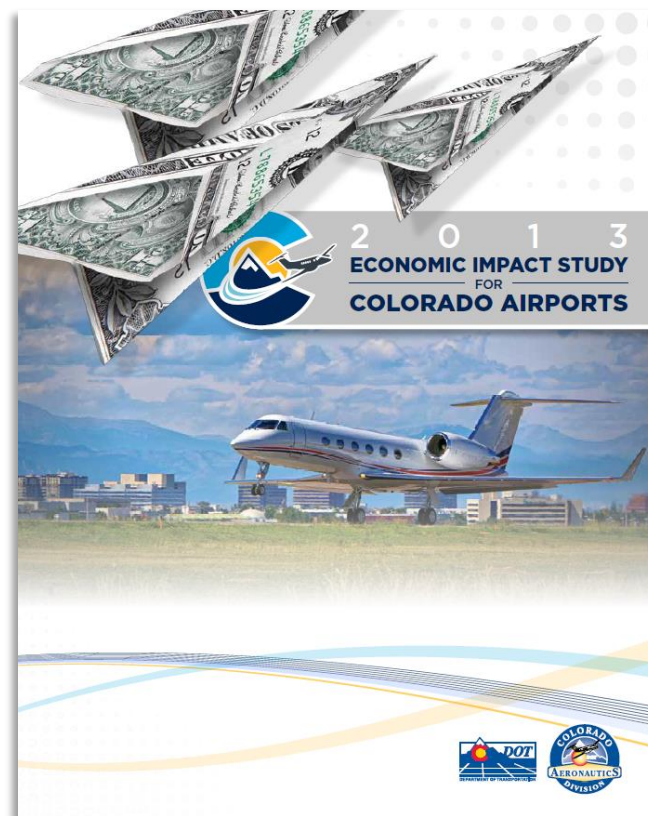




Colorado Aviation Economic Impact Study CEIS

Prior CEIS Analysis

- Quantitative data analysis and results
- Focus on qualitative stories
- Impacts:
 - Statewide
 - Denver International
 - Each individual airport



265,700

JOBS



\$12.6B

IN PAYROLL



\$36.7B

IN OUTPUT

2019 CEIS

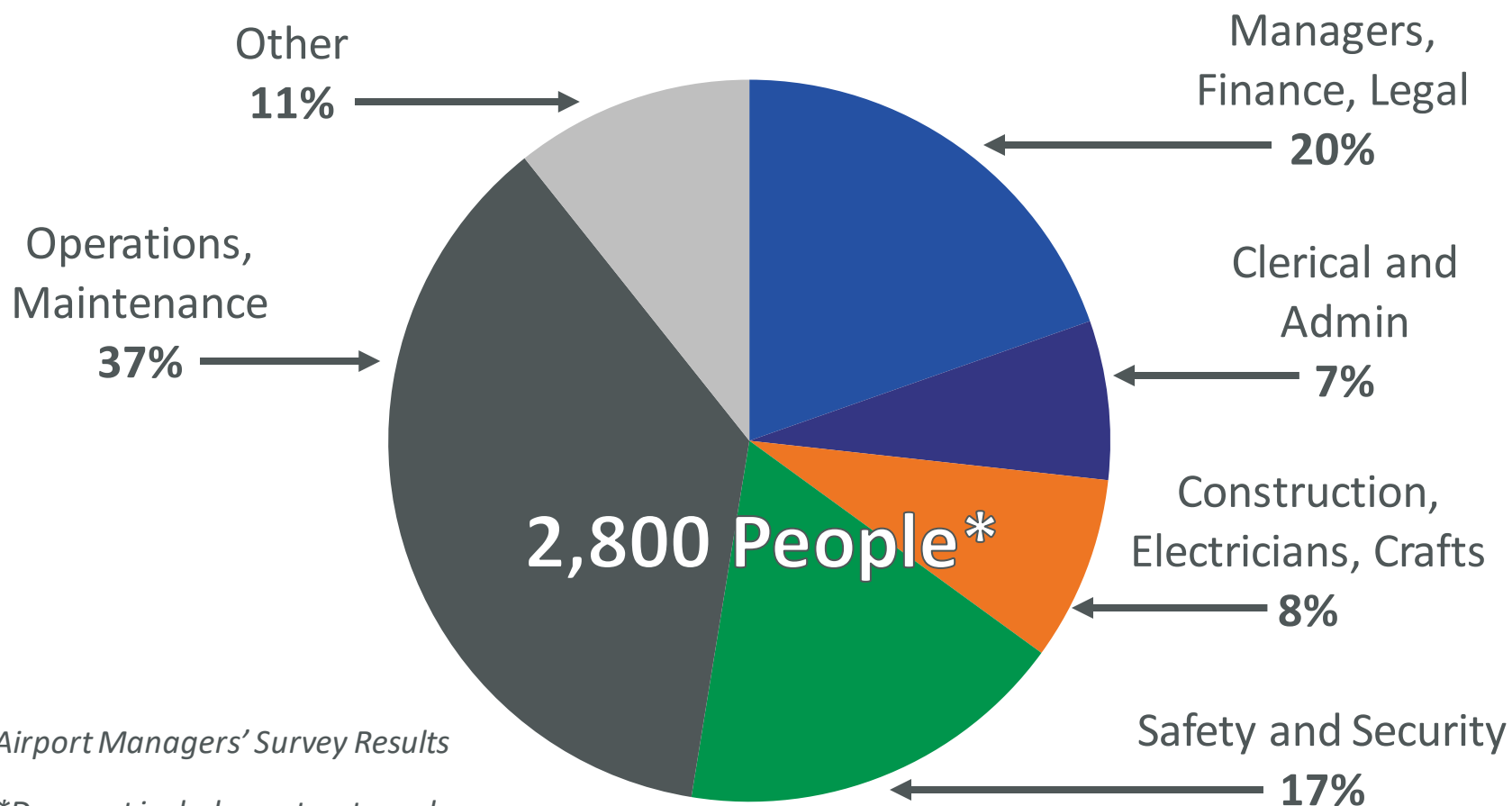
- Consistent methodology with prior study for comparative purposes
- Simpler terminology
- Air cargo, agricultural, and tax analyses
- Focus on stories of airport/business reliance and activity
- CDOT-managed economic impact dynamic calculator

Data Collection Efforts

Colorado Aviation System Plan and Economic Impact Study Data Collection					
November/December		January	February	March	April/May
Inventory Type and Audience	Airport Managers <i>Airport managers</i>				
	Airport Tenants <i>On-airport tenants with employees at a Colorado airport</i>				
		Air Carrier Passenger (multi-airline airports) <i>Out of state visitors departing from Colorado at a commercial service airport served by multiple airlines</i>			
		Air Carrier Passenger (single airline airports) <i>Out of state visitors departing from Colorado at a commercial service airport served by a single airline</i>			
	Fixed Based Operator <i>On-airport FBOs with employees at a Colorado airport</i>				
	General Aviation (GA) Pilots/Visitors <i>Pilots and passengers visiting a GA airport from out of state</i>				
			Businesses that Own/Lease Aircraft <i>Aircraft owners and leaseholders that use their aircraft for business purposes</i>		
			Businesses that Rely on CO Airports <i>Off-airport businesses that rely on a Colorado airport to conduct business activities</i>		

Preliminary Airport Management Results

Employment by Occupation all Airports

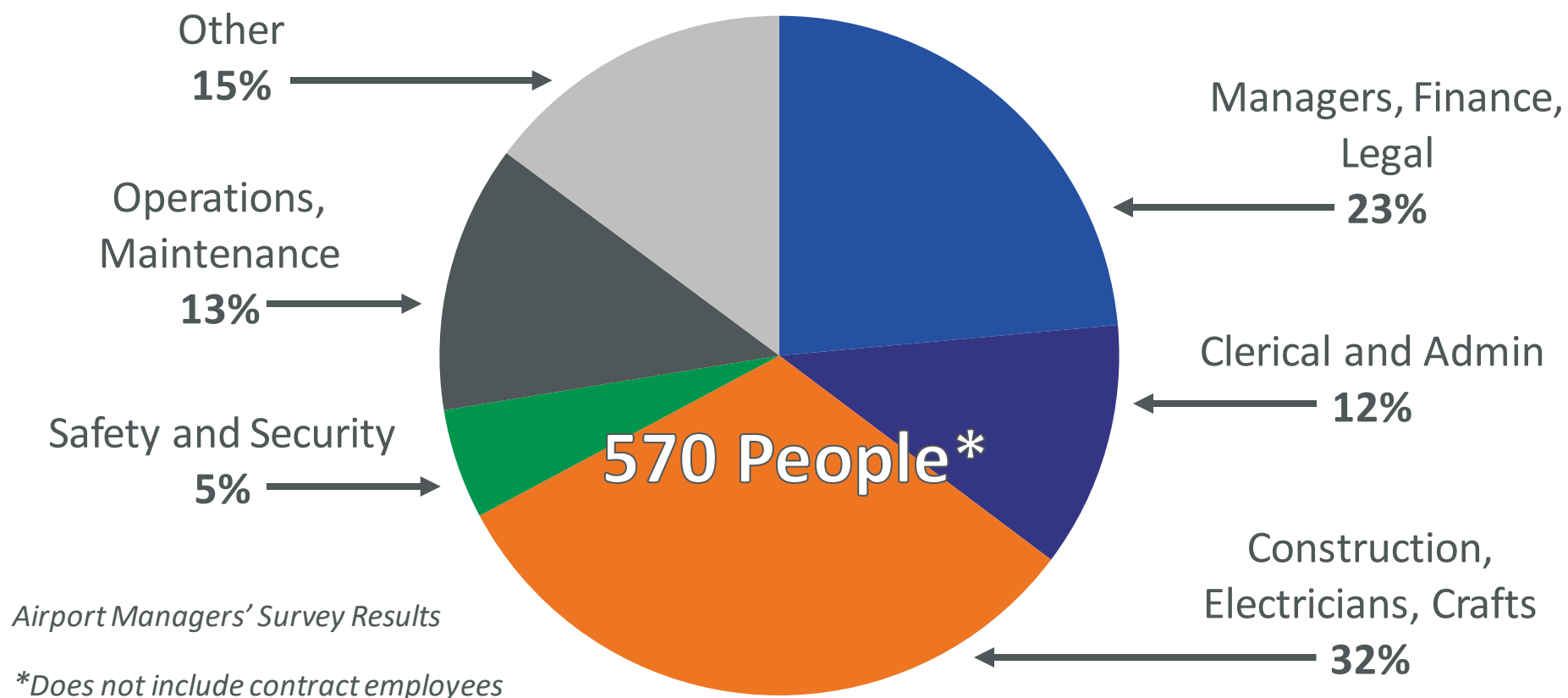


Airport Managers' Survey Results

**Does not include contract employees*

Preliminary Airport Management Results (without DEN)

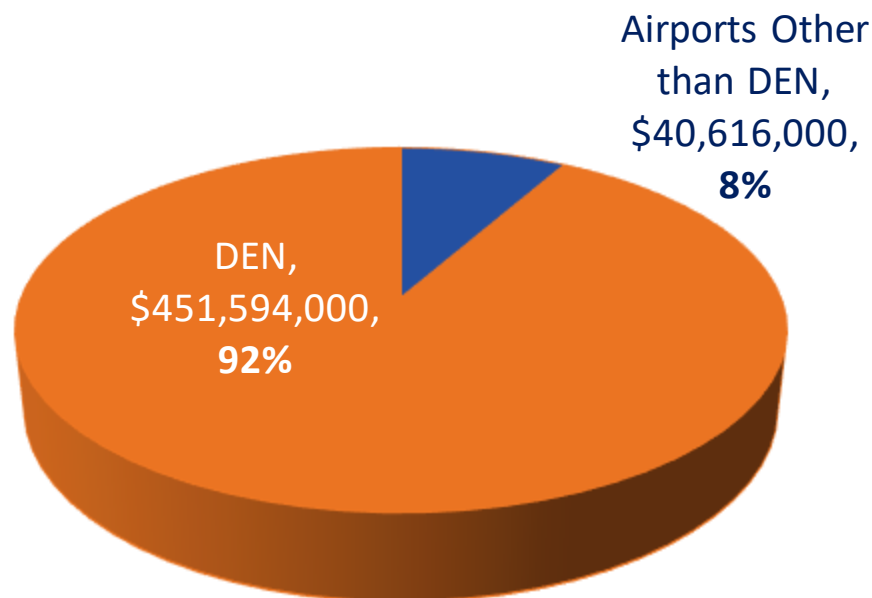
Employment by Occupation



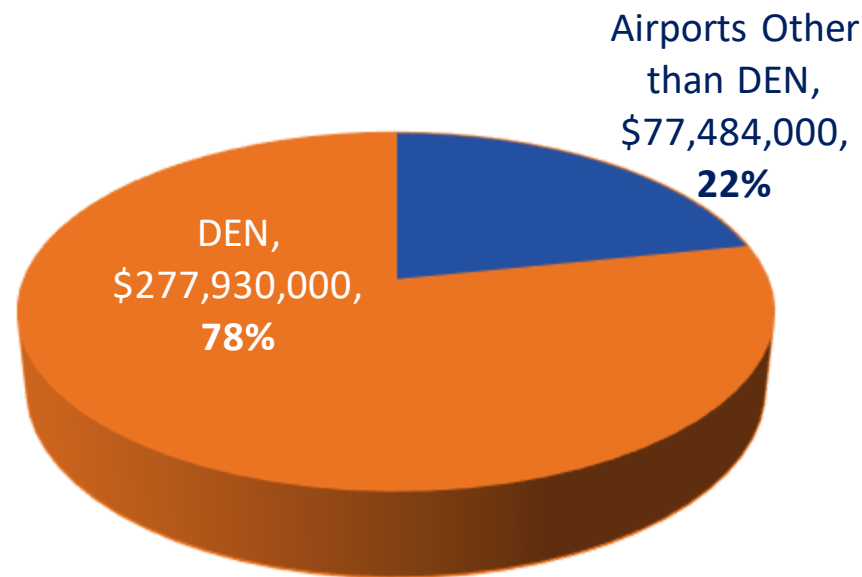
Operating & Capital Expenditures for Colorado Airports

2018 Operating Expenditures	2018 Capital Expenditures
\$492.2 Million	\$355.4 Million

Operating Expenditures

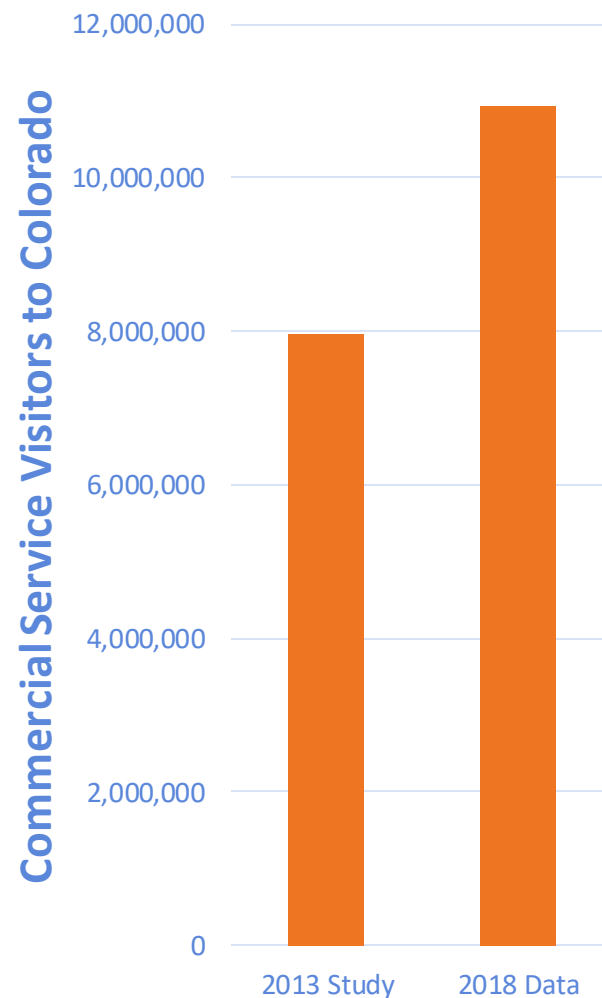


Capital Expenditures



Air Carrier Visitors

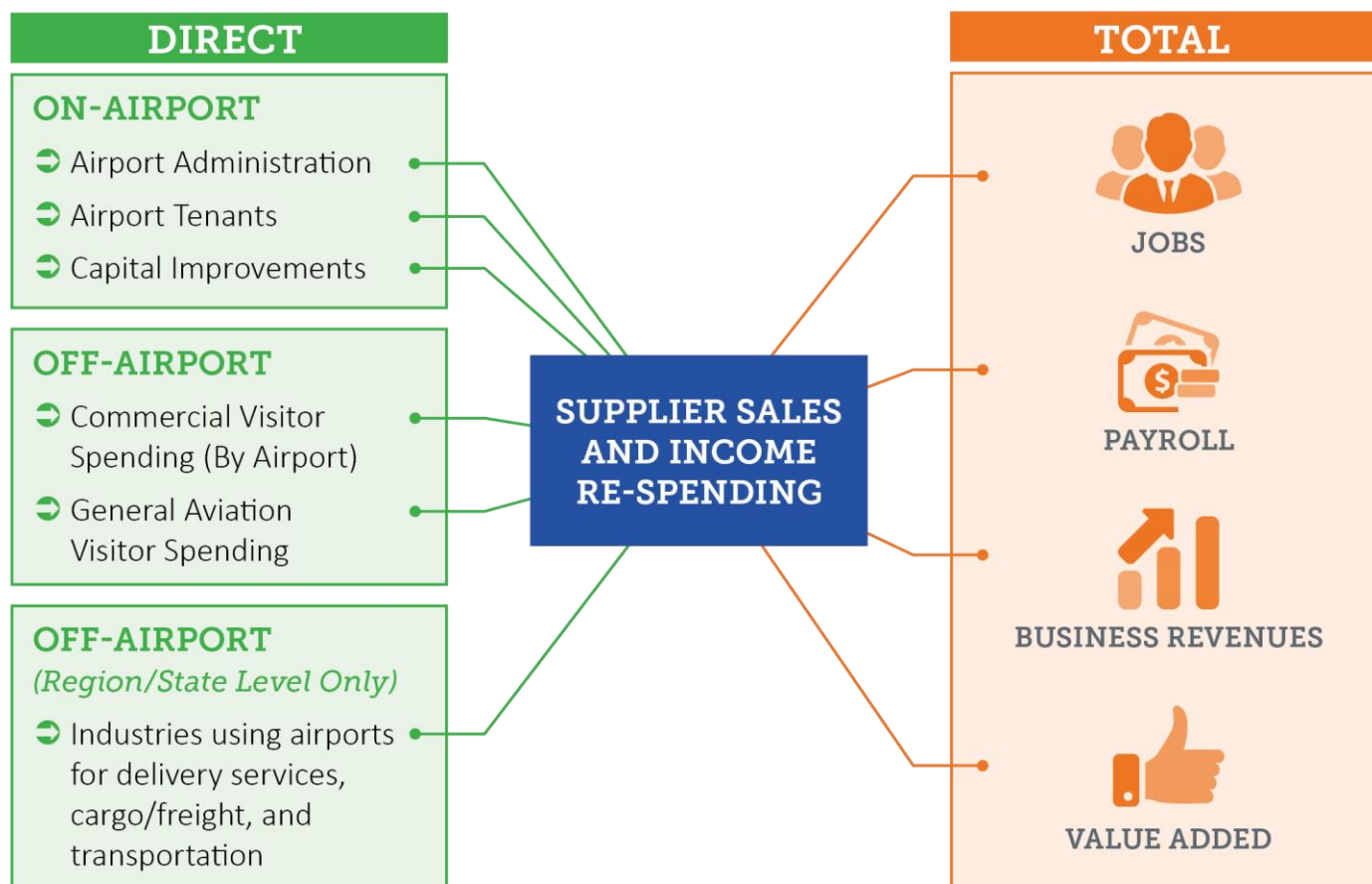
- Estimated using Airline Data Inc. which identifies split between residents and visitors
- *Initial estimate of nearly 11 million visitors*
- Apply spending data obtained through passenger surveys at airports



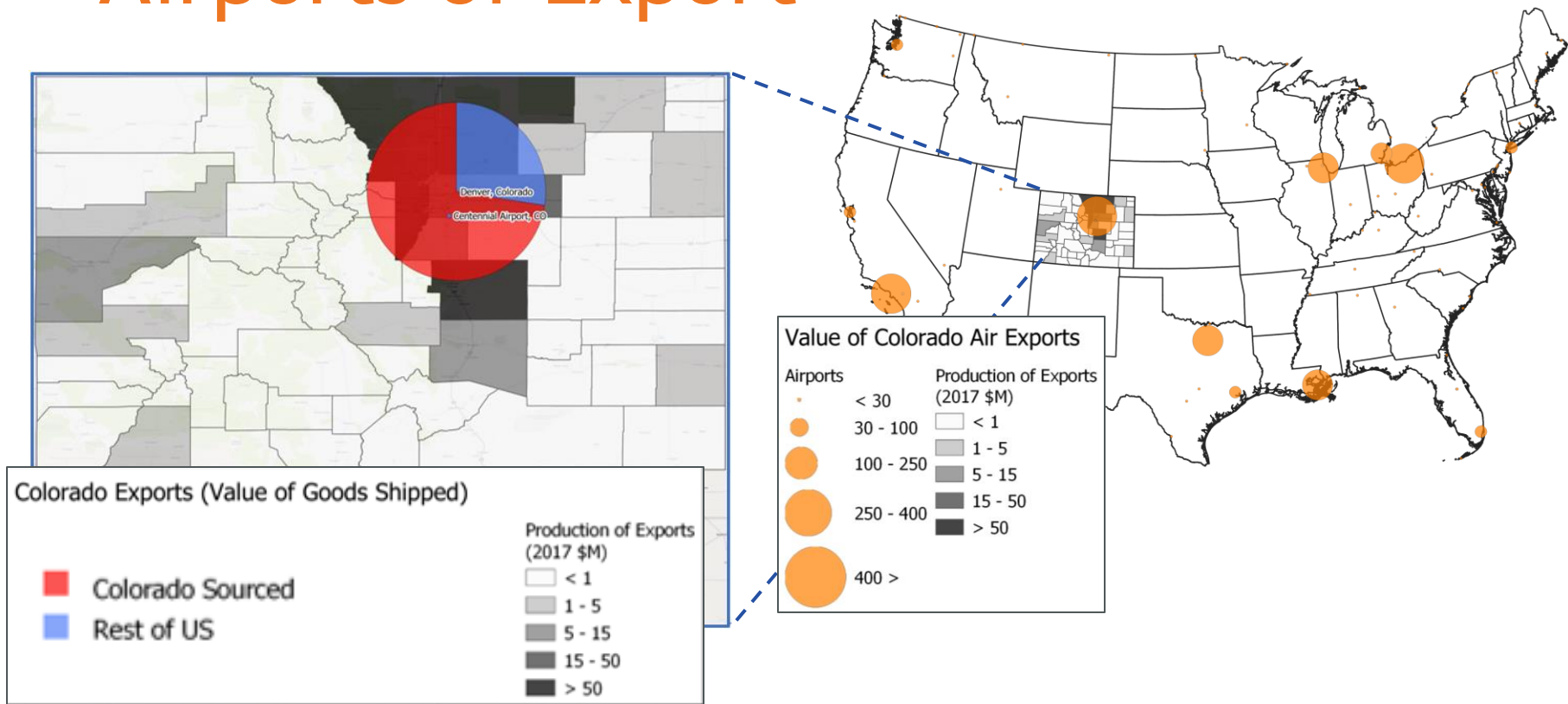
GA Visitors

- Estimate using data on itinerant operations, subset is “true transient”
 - From out of state AND
 - Leave the airport to spend \$\$ in community
- Apply:
 - Number of passengers per true transient operation
 - Spending by passengers per true transient operation

Calculating Total Impacts

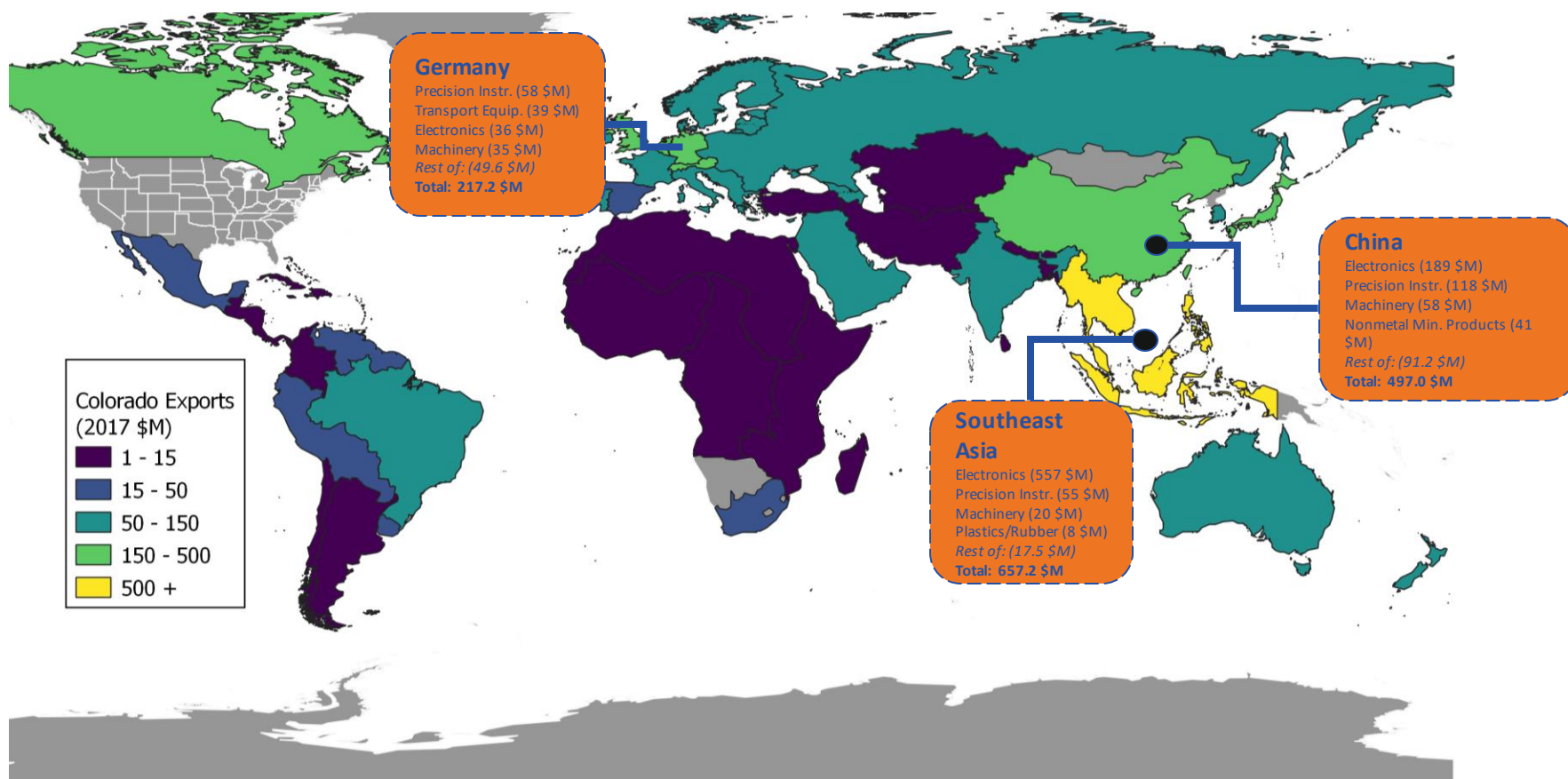


Colorado Production of Air Exports, Airports of Export



- County-level production of Air Exports
- Orange bubbles represent Airports that Export CO air cargo
- Red and blue bubble pie – how much of Denver cargo is Colorado related versus rest of US

Where are Colorado Air Exports Going?



What if the airport experiences...

- New airline (passenger or cargo) service?
- Jet fuel is added?
- General aviation operations decrease?
- Number of based aircraft increases?
- New business (MRO, FBO, concessions)?

Dynamic Calculator is being developed to help address potential changes at CO airports

Dynamic Calculator

- Estimates economic impact of various 'what-if' scenarios
- CDOT will manage updates
- Airports will provide data needed to analyze the scenario

Scenario Name:

Anticipated on-Airport Jobs After Scenario Takes Effect

Category	2018 Baseline	Scenario
Transportation Activities		
Airport Administration		
Airline Companies		
Charter Services other than FBO		
FBO		
Rental of Aviation Equipment		
Repair of Aviation Equipment		
Sale of Aircraft		
Sale of Other Aviation Equipment		
Supporting Services		
Aviation Training and Education		
Building Maintenance		
Federal Government (non-military)		
Military National Guard		
Parking		
Public Safety (Police, Fire)		
Security/TSA		

Freight

Category	2018 Baseline	Scenario
Cargo Consolidators & Air Couriers		
Postal Service		

Anticipated Scenario Construction Budget

Category	Estimated Cost
New/Extended Runway	
Other Airfield	
New Building	
Renovated Building	
Other, Specify:	
Total	

Data Entry Sheet for Scenario

Record

Airport Name:

3-Digit Identifier:

Scenario Name:

Scenario Description:

Name, Title & Contact Information of Person Submitting Scenario:

Name:

Title:

Phone:

Email:

Date of Submission to CDOT:

Anticipated Aviation Outcomes of Scenario

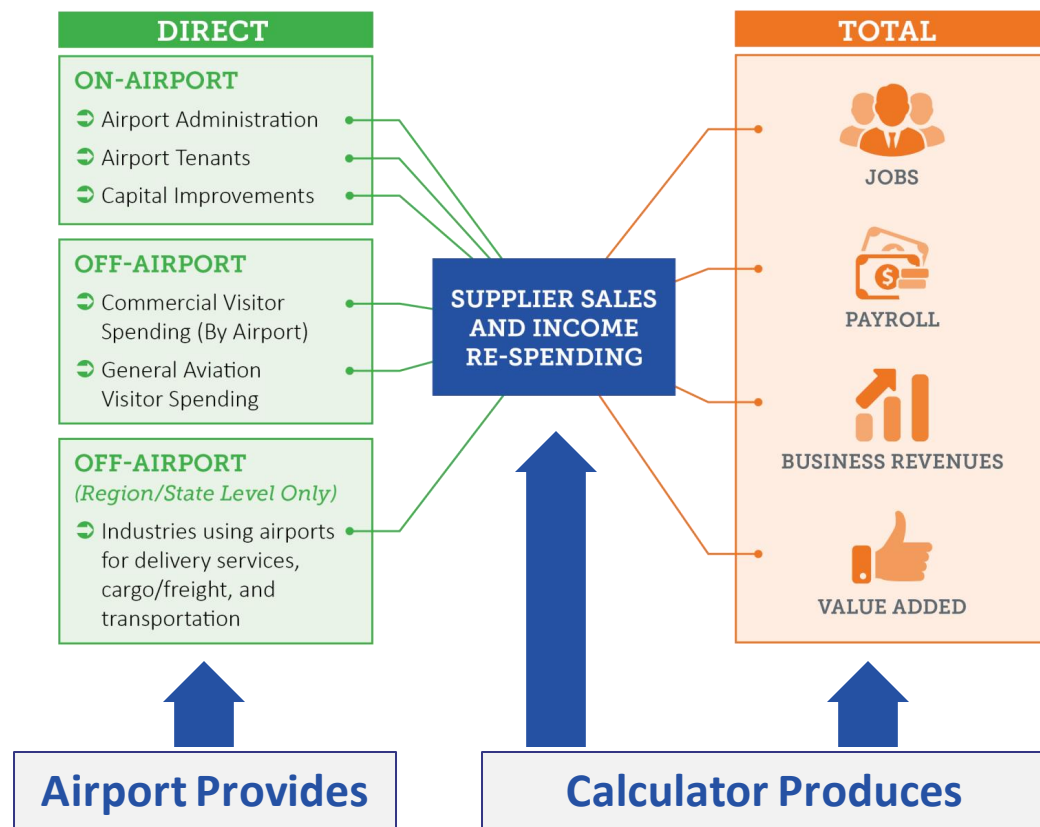
Aircraft Movement	Number		2018 Percent Visitors/ Transient Passengers	Scenario
	2018 Baseline	Scenario		
Enplanement Adjustment				
GA Operations Adjustment				
Passengers per Transient Operation				
Additional Commercial Operations				
All-Cargo Landings Adjustment				
All-Cargo Departures Adjustment				



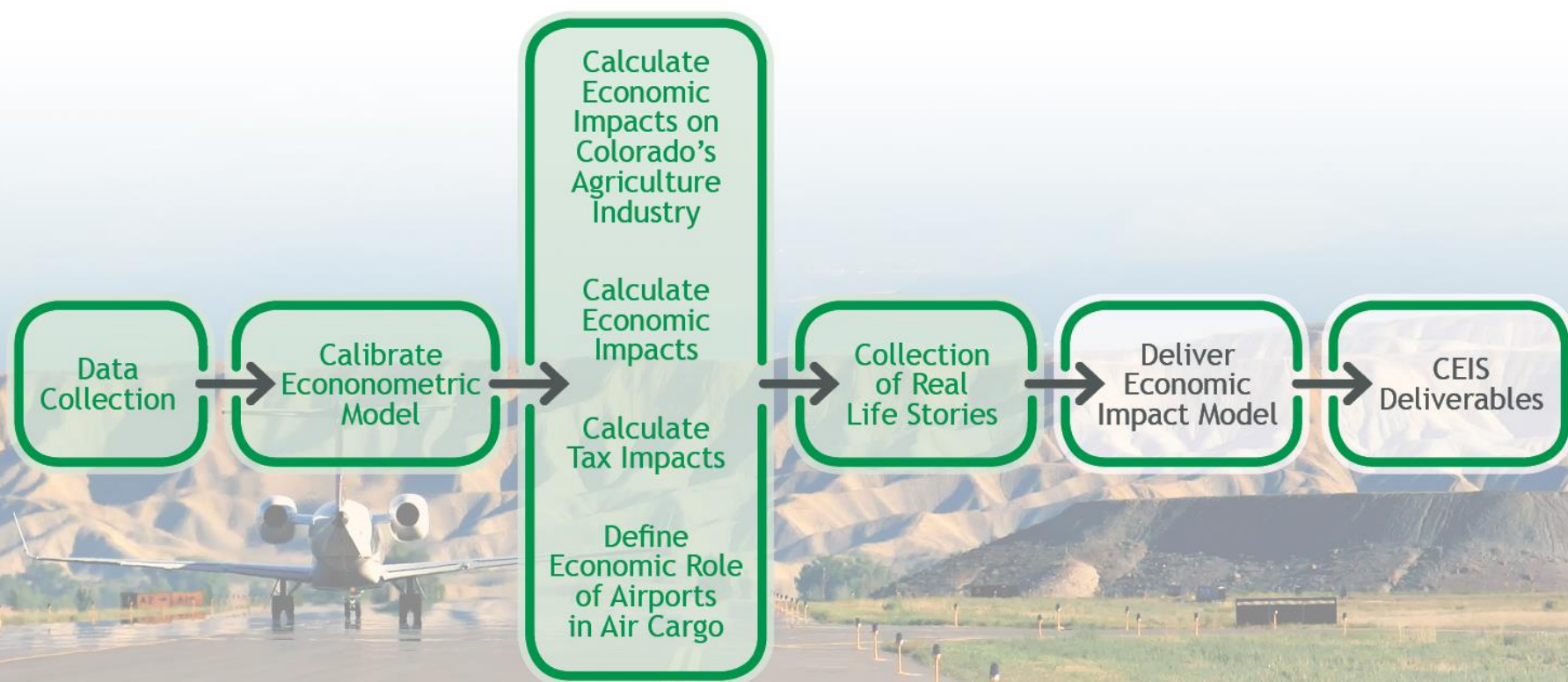
Based Aircraft Adjustment	Number		Gallons	
	2018 Baseline	Scenario	2018 Baseline	Scenario
Jets			Jet Fuel	
Propeller			AvGas	
Other (specify)				

Reports Provide Airport With:

- Updated results due to change in activity by impact type:
 - Direct
 - Supplier sales & income re-spending
 - TOTALS



Upcoming Tasks



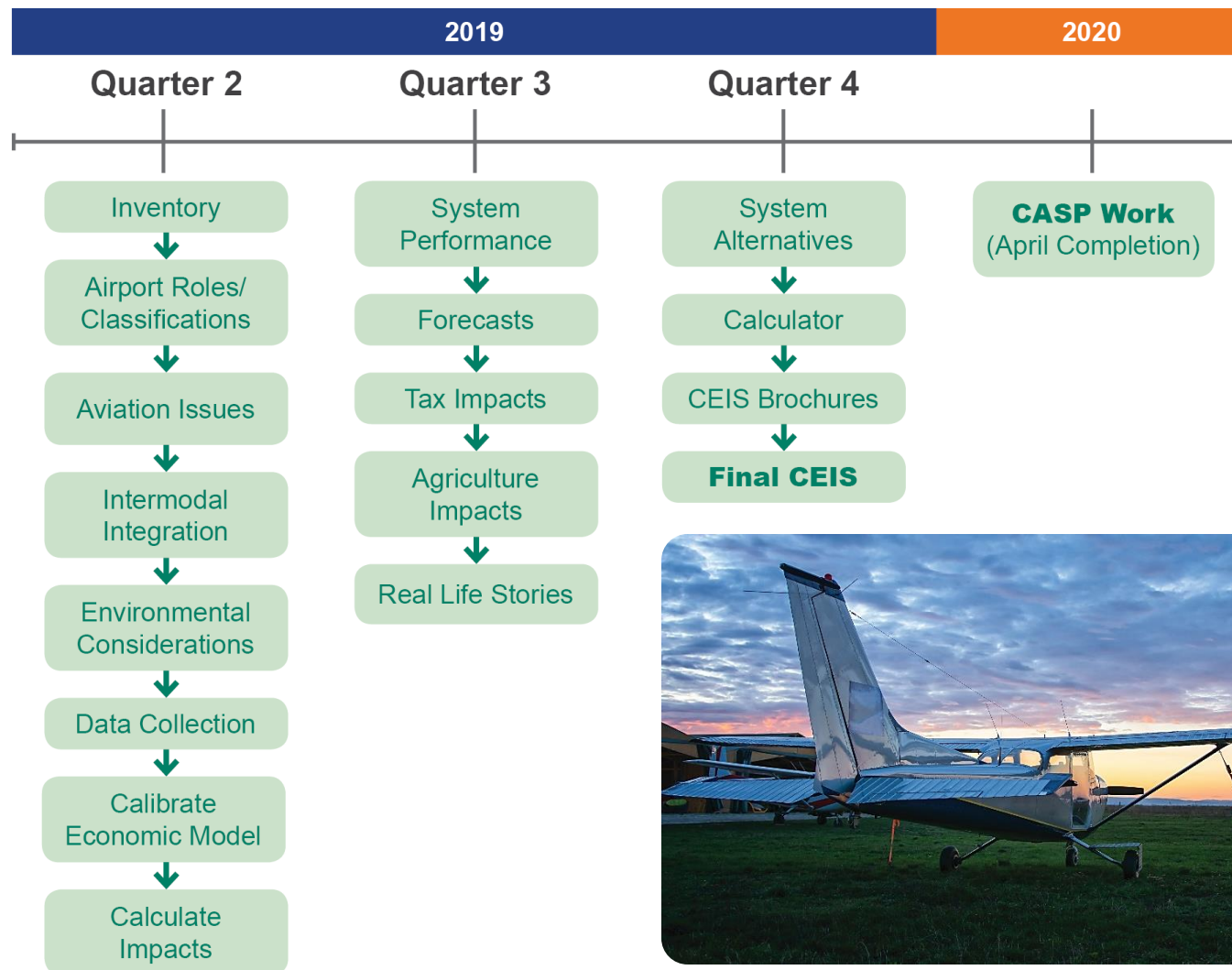
We Need YOUR INPUT

- Confirm your tenant employment (emailed week of 5/27) - NOW
- Provide input on stories that demonstrate airport value and contributions
- Future review of draft airport brochures

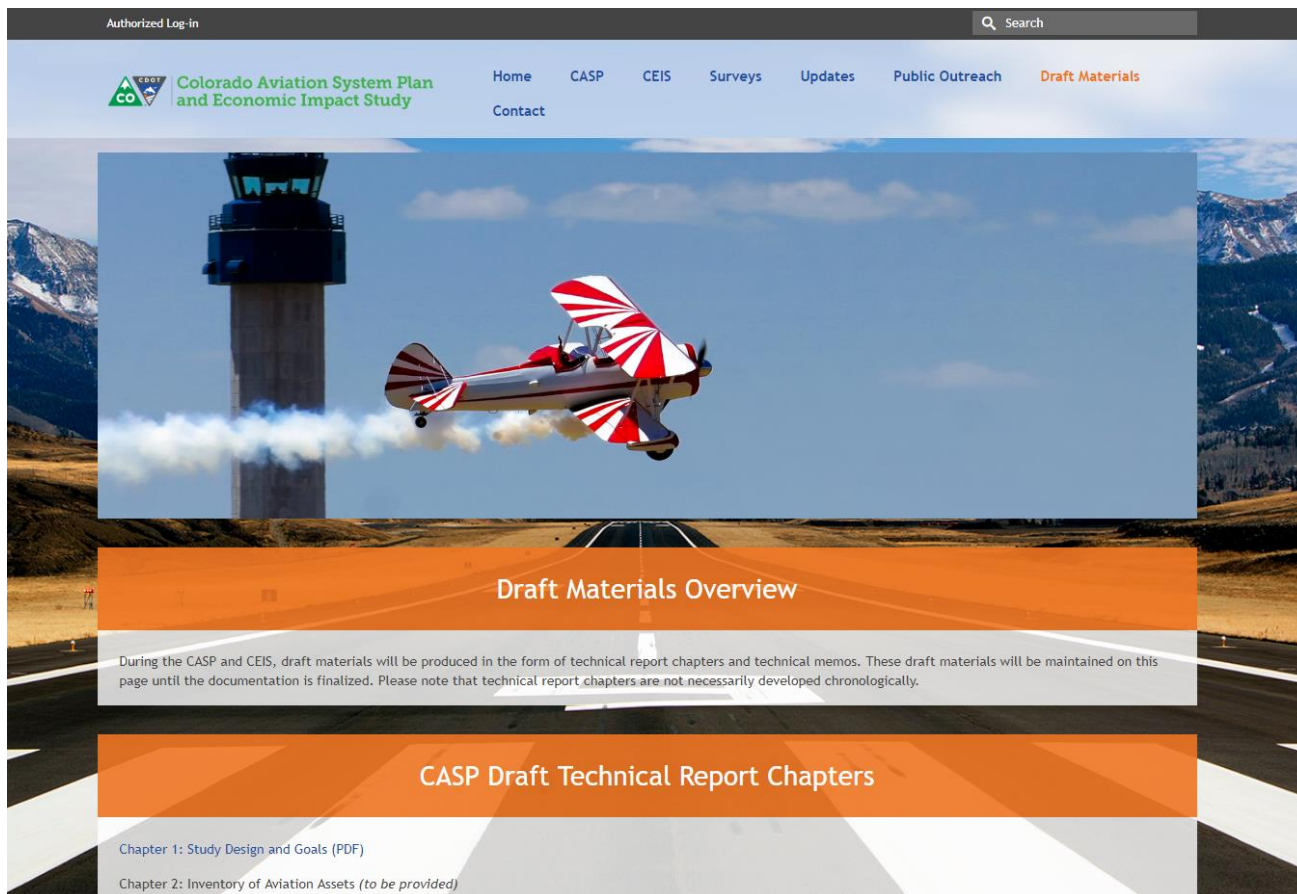
Project Deliverables

- CEIS Technical Report
- CEIS Statewide Brochure
- CASP Technical Report
- CASP Statewide Brochure
- Individual Airport Brochures
- Data for WIMS
- Video

Where We Are



Project Website



www.coloradoaviationsystem.com

Questions?

Thank you for your participation!

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