

# West Virginia Aviation Economic Impact Study (AEIS)

## Project Advisory Committee (PAC) Meetings # 1

September 23rd, 2020

1:30 PM – 2:30 PM

### Attendees:

Attendee Name – Organization	Attendee Name - Organization
Sean Hill – WVAC	Meghan Smith – WV Development Office
Angela Talbott – WVAC	Chelsea Ruby – WV Office of Tourism
Regan Schnug – Kimley-Horn	Samantha Nygaard – WV Office of Tourism
Brittany Kimura – Kimley-Horn	Rita Pauley – WVDOT Department of Highways
Steve Landau – EBP	Richard Rock – WV Airport Manager Association, North Central WV Airport (Bridgeport)
James “Jay” Wallace – WVAC	Clint Ransom – Mercer County Airport
Tracy Miller – WVAC, Mid-Atlantic Aerospace Complex	Matt DiGiulian – Federal Aviation Administration
David Cramer – WVDOT Office of Economic Development	Mike Adkins – Federal Aviation Administration

### PAC Members Not Present:

Attendee Name – Organization	Attendee Name - Organization
Gerald Sites – WVAC	Brian Thompson – WVAC

## PAC Meeting Presentation

### a. Introductions

- Regan welcomed all attendees to the webinar and asked each PAC member to introduce themselves and to comment briefly on how they and their representative groups rely on aviation or are otherwise impacted by aviation and how they believe the study will be meaningful for their agencies.
  - **Tracy Miller** – *The study will provide data-driven results as the state is targeting growth of the aviation industry. It will show what an important sector aviation is to the state and provide an important moment in time to make future comparisons of industry growth. The numbers that come out of the study will be used by all stakeholders to communicate the importance of the industry.*
  - **David Cramer** – *The study will show the rate of return on investment which is important for anything in which public dollars are being used. The findings could also be used to see which airports will get the “most bang for your buck” in terms of allocating funding. Additionally, the study can be used to indicate how transportation projects can support the airports.*
  - **Rita Pauley** – *Although new to her position, Rita advises Sean on legal advice and rulemaking. She is extremely excited to see the study move forward.*

- **Chelsea Ruby** – Tourism has seen tremendous growth over the past few years following a period of decline. Study findings will be extremely helpful to identify new “fly” markets for advertising and generating more tourism.
  - **Meghan Smith** – Her position works closely with all sectors of the aerospace industry from manufacturing to composite materials. The study will be especially helpful in attracting a wide range of new aerospace companies to West Virginia.
  - **Clint Ransom** – This study is extremely important to show decision-makers how important small and/or rural general aviation (GA) airports are to the local community and to the regional and state economies. It will provide the airports tactile data to lobby for more resources and make the argument that GA airports are critical resources.
  - **Matt DiGiulian** – The study will be used first and foremost for marketing and decision-making processes by the Aeronautics Commission. The FAA’s role in the study is primarily to serve as spectators to see what the deliverables are and to ensure grant funding is being used for its intended purposes.
  - **Mike Adkins** – Mike is a new member to the FAA planning team and will be involved in the WV AEIS.
- b. PAC Meeting Presentation
- Regan presented key information about the role of the PAC, an overview of the study and process, an update on current tasks, initial findings, and future tasks including final deliverables.
  - Regan engaged the PAC and asked how many members have previously been involved in an economic impact study and if the process was similar to how the WV AEIS is being conducted. Four PAC members indicated they have been involved in other studies and of those, three noted the process was similar.
  - Project efforts are currently focused on the data collection process for both quantitative and qualitative data points.
    - The study is utilizing 2019 rather than 2020 data as this was the most recently completed calendar year at the start of the study. 2019 will also provide a snapshot of “normal activity” in comparison to 2020 activity which has been influenced by the impacts of COVID-19. The study will anecdotally address the impacts of COVID-19 on aviation in WV at a high level and draw comparisons of aviation activity between the two years.
    - Initial findings from collected quantitative data showed the following:
      1. There are approximately 300 airport-employed personnel at WV airports responsible for airport management, administration, maintenance, and operation. Additionally, there are approximately 140 on-airport tenants with an estimated 5,600 employees.
      2. Preliminary findings from GA visitor spending surveys submitted to date show GA visitors spend an average of \$262 per person, but these results are skewed by higher spending profiles of visitors from Greenbrier airport. Most GA visitors are taking a day trip to WV, with 2-3 days being the next most frequent average trip length. This data is preliminary and WVAC is encouraging other

airports to participate in the GA survey to have a more balanced initial data set.

3. *Commercial Service (CS) passengers spend an average of \$117 - \$299 per person depending on what airport they arrive through using data from Longwoods from the WV Office of Tourism. A secondary commercial visitor survey effort is currently ongoing via SurveyMonkey. Yeager and Morgantown have posted the link on their wi-fi pages to encourage travelers to complete the survey. From the results to date, most passengers are staying 2 to 3 weeks in WV. Other CS airports are encouraged by WVAC to participate in deploying the CS visitor survey.*

- *PAC members were presented a list of case study candidates for qualitative data collection efforts and asked to provide any other recommendations for candidates and/or feedback on the existing list. PAC members did not have any immediate feedback. Sean commented that the current candidates provide a well-rounded cross-section of a wide range of activities and interest*

- While COVID-19 delayed the data collection efforts, the project is progressing on the updated schedule. Data collection will conclude in December.

c. Open Discussion

- Are there ways you think this study will be particularly useful to your agency/stakeholders?
  - *PAC members did not have any questions/comments.*
- Is there anything we can do to help make this study more useful to you?
  - *PAC members did not have any questions/comments.*
- Would any of our raw data be of interest to you?
  - *Richard Rock, Chelsea Ruby, and Tracy Miller indicated interest in receiving the raw data collected by the project team.*
- What questions do you have on the project?
  - *Clint Ransom – asked about low response rates for GA visitor surveys at airports and how multipliers are applied in that case. Steve Landau indicated that in the event low response rates do not result in desired sample sizes, data is aggregated from similar facilities from other states to create a comparable visitor spending profile. Multipliers are generated at a regional level and will not be influenced by low response rates for surveys. Multipliers will be applied to out-of-state visitor spending results. Regan explained that these methods have been historically used in previous economic impact studies as many resulted in little to no survey responses. A notable number of surveys have been completed at WV airports and Regan attributed this to WV airport managers' enthusiasm and efforts made to get visitors to complete surveys.*

d. Wrap Up

- Regan provided contact information for the project team if any PAC members wanted to follow up after the meeting.
- Regan concluded the meeting at 2:30pm.