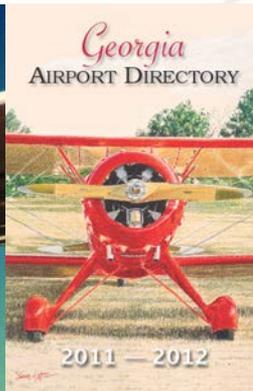


2011 Georgia Statewide Airport Economic Impact Study

Atlanta Aero Club
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presented by
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Study Elements

- **Statewide Economic Impact Analysis**
- **Aviation Generated Revenue Study**
- **Airport Case Studies**
- **Business Case Studies**
- **DVD – Georgia Airports Mean Business**



Impact Measurement Factors

- On-airport businesses
- On-airport capital improvements
- Visitor spending
- Non-aviation businesses dependent on airports



Data Collected

■ Surveys of:

- 103 study airports
- 520 on-airport businesses
- Commercial airline visitors
- Transient GA visitors
- Non-aviation businesses



Economic Benefits Reported

- **Jobs**
- **Annual payroll**
- **Annual economic output**
 - airport-related spending
 - capital improvements
 - all visitor spending



On-Airport Impacts

- **On-airport businesses and tenants**

- Fixed base operators (FBO)
- Airlines
- Air traffic control
- Aircraft maintenance
- Other aviation-related businesses

- **Capital improvement projects (CIP)**

- FAA, GDOT, local investment
- Averaged over multi-year period



Visitor Spending Impacts

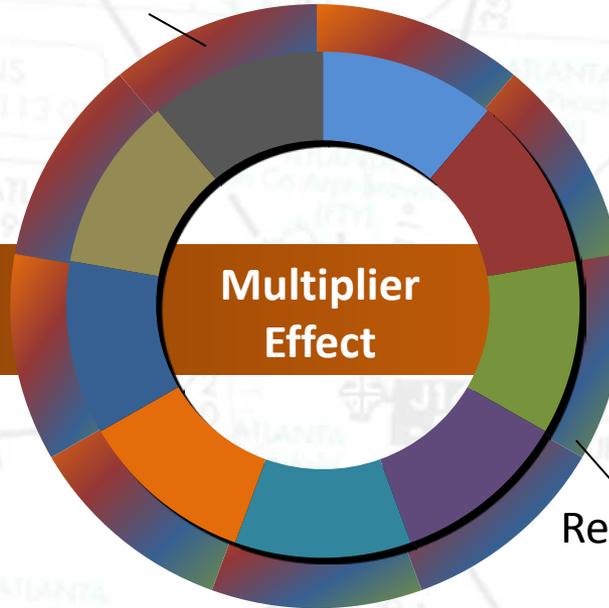
- **Jobs per \$1 million in visitor spending**
 - Commercial Service Airports = 10-13 jobs
 - General Aviation Airports = 17-22 jobs
- **Jobs supported by visitor spending are primarily in the service industry**



Impact Categories

Responding of on-airport and visitor impacts

- Tenants
- Aerospace
- Airlines
- Military
- Air Cargo
- Education
- Manufacturing
- Visitors
- Construction



Responding of multiplier impacts

$$\begin{array}{c} \uparrow \\ \text{On-Airport \& Visitor} \\ \text{Impacts} \end{array} + \begin{array}{c} \uparrow \\ \text{Multiplier Impacts} \end{array} = \begin{array}{c} \uparrow \\ \text{Total Impacts} \end{array}$$

Multiplier Impacts

Joe
Aircraft Mechanic



Sarah
Child Care Provider

Sam
Grocer

Bob
Pharmacy

Betty
Music Lessons

Joan
Physician

John
Hardware Store

Summary of Economic Impacts

Summary of Annual Economic Impact



	Impacts	Hartsfield-Jackson Atlanta International	Other Commercial Service Airports	General Aviation Airports	Statewide Totals
JOBS	On-Airport	68,323	10,569	3,997	82,889
	Visitor	169,522	4,549	1,548	175,619
	Multiplier	196,589	11,333	4,745	212,667
Total Jobs		434,434	26,451	10,290	471,175
PAYROLL	On-Airport	\$5,127,000,000	\$595,000,000	\$183,000,000	\$5,905,000,000
	Visitor	\$3,402,000,000	\$92,000,000	\$31,000,000	\$3,525,000,000
	Multiplier	\$7,784,000,000	\$423,000,000	\$140,000,000	\$8,347,000,000
Total Payroll		\$16,313,000,000	\$1,110,000,000	\$354,000,000	\$17,777,000,000
ECONOMIC OUTPUT	On-Airport	\$18,678,000,000	\$1,818,000,000	\$698,000,000	\$21,194,000,000
	Visitor	\$13,902,000,000	\$382,000,000	\$85,000,000	\$14,369,000,000
	Multiplier	\$25,640,000,000	\$1,006,000,000	\$421,000,000	\$27,067,000,000
Total Economic Output		\$58,220,000,000	\$3,206,000,000	\$1,204,000,000	\$62,630,000,000

Note: Hartsfield-Jackson Atlanta International Airport data is from 2009 Economic Impact Study. All other data is based on CY2010.

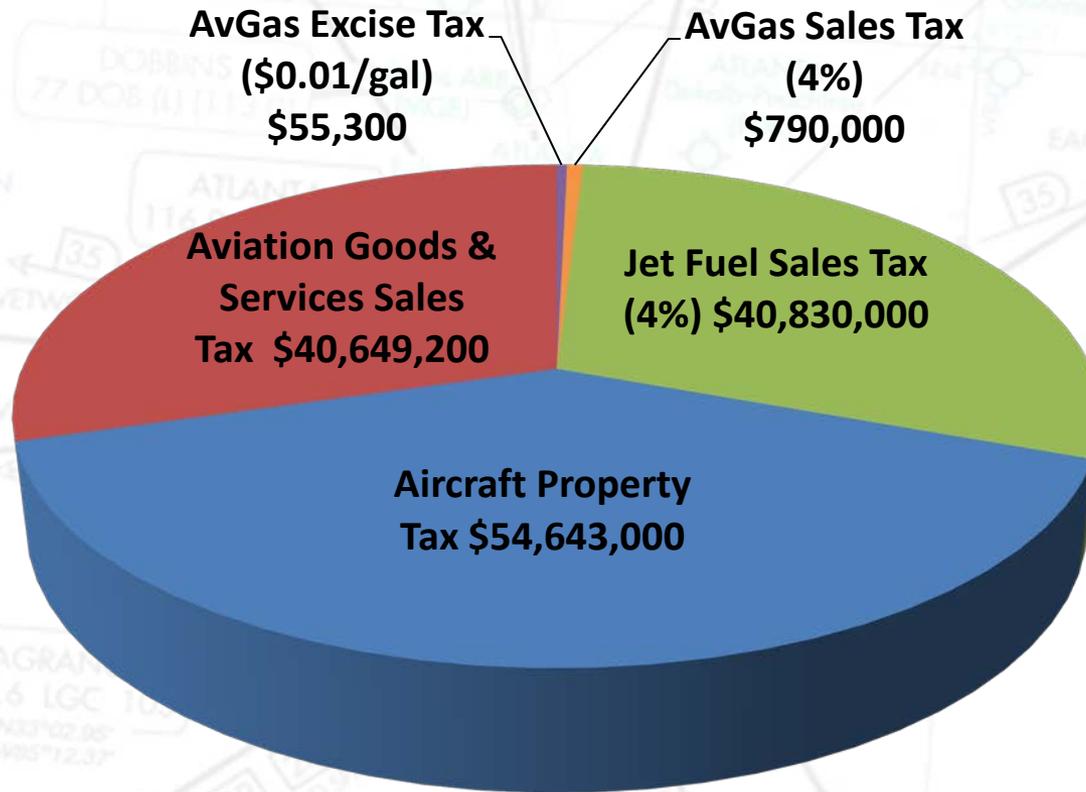
Jobs: Gwinnett County – Briscoe Field

On-Airport Jobs	260
Jobs Supported by General Aviation Visitor Spending	104
Total On-Airport and Visitor Jobs	364
Multiplier Jobs	366
Total Jobs	730

Total Economic Impact: Gwinnett County – Briscoe Field

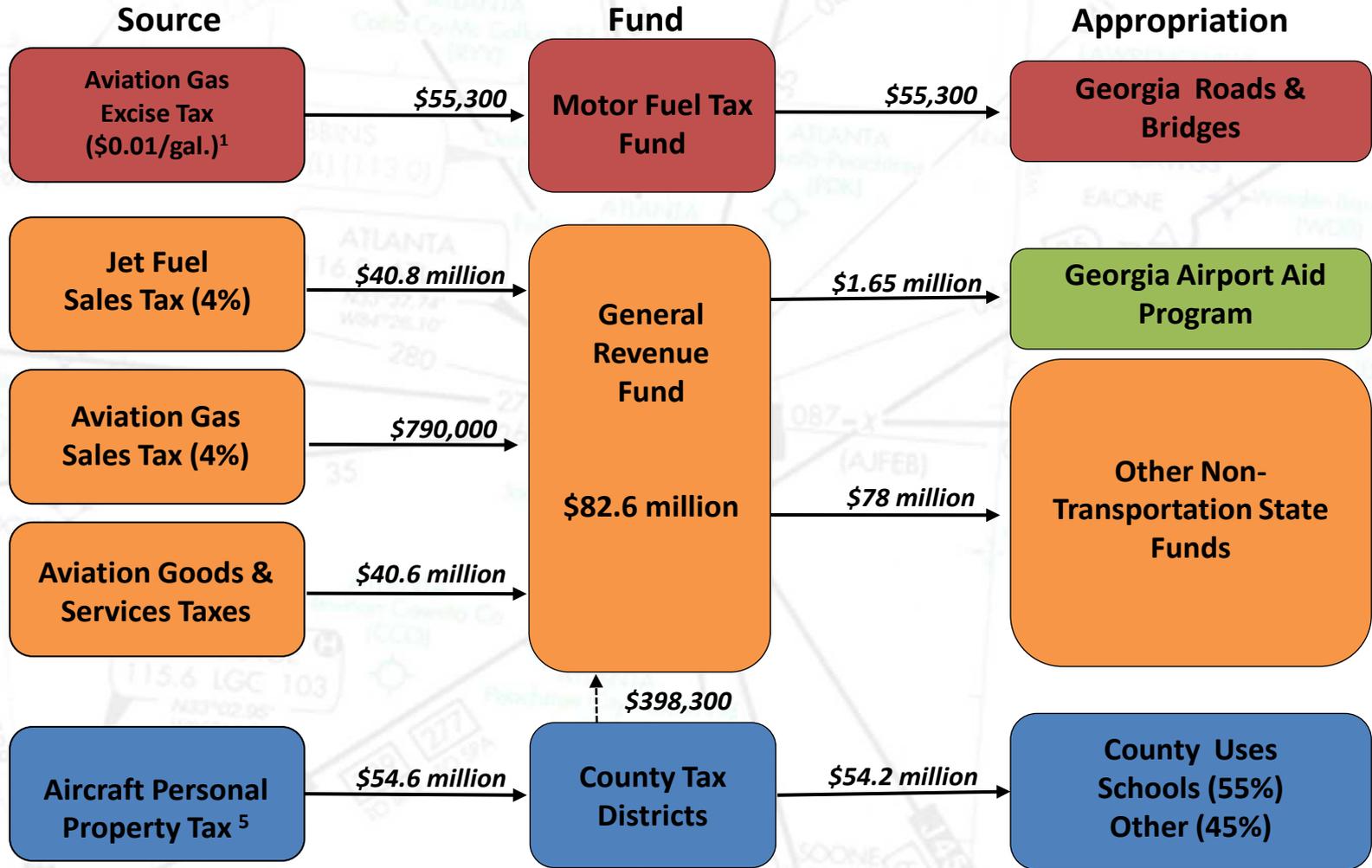
On-Airport	\$47,736,500
General Aviation Visitor	\$6,138,400
Total On-Airport and Visitor Impacts	\$53,874,900
Multiplier	\$31,496,300
Total Impacts	\$85,371,200

Direct Aviation-Related Revenue Summary



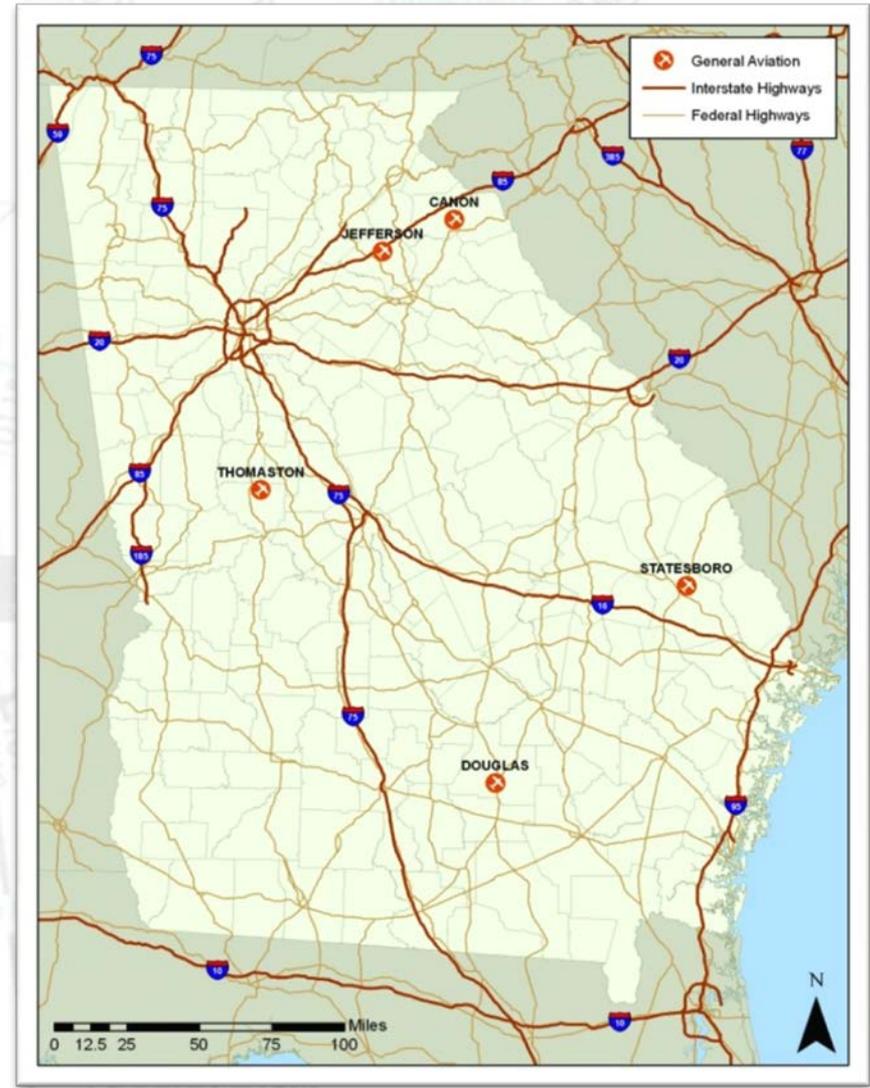
Total Tax Revenue Generated = \$136,967,500

Revenue Study: Flow of Aviation Generated Revenues



Airport Case Studies

- Interviews conducted in November 2010
 - Franklin-Hart County
 - Jackson County
 - Thomaston-Upson County
 - Statesboro-Bulloch County
 - Douglas Municipal

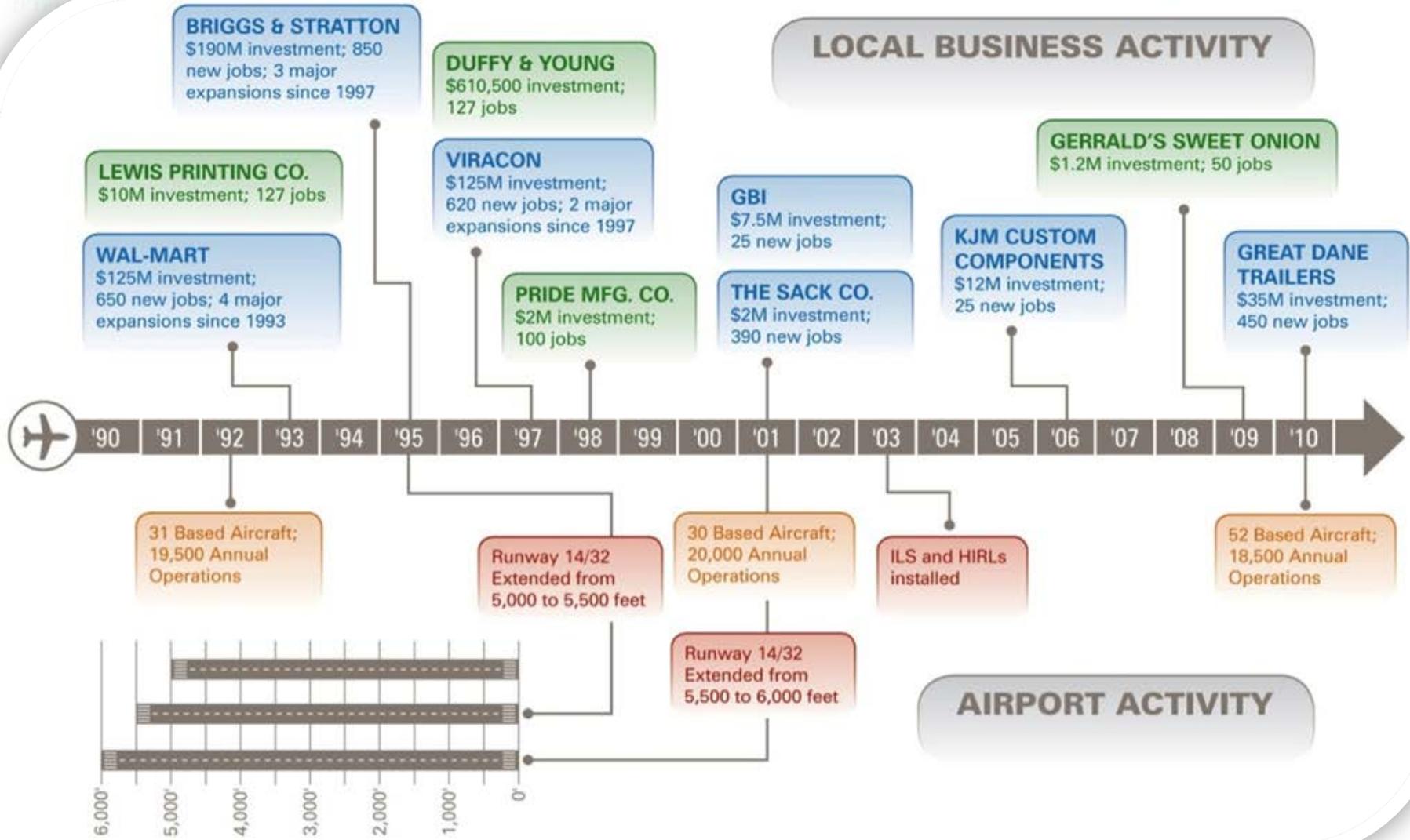


Statesboro Case Study

- **Since 1991, Statesboro-Bulloch County has:**
 - Attracted 43 new industries and businesses
 - Experienced \$900 million in investment
 - Added more than 4,400 new jobs
 - 25% increase in population
- **Local businesses rely on the airport:**
 - Briggs & Stratton
 - Georgia Southern University
 - Local doctors
 - RB Baker Construction
 - Carmike Cinemas



Statesboro Case Study



Business Profiles



Standridge Color Corporation

In operation since 1980, Standridge Color Corporation is a leader in the production of high quality colorants for the plastics industry. Headquartered in Dalton, Georgia, the company employs more than 350 people and has facilities located in the U.S., Europe, and China with combined sales of over \$220 million in 2010. The colorants they manufacture are used in a wide variety of products including carpet fibers, food packaging, and automotive parts.

In 1992, Standridge Color purchased its first aircraft, a Beechcraft King Air. Over the numerous trips made to Dalton, Georgia and various parts of the world, nearly 20 years later, the company's corporate flight department now consists of three Beechcraft King Air aircraft and one Beechcraft Baron.

Owner, Bob Standridge, believes Standridge Color is not only a manufacturer but also a service provider. The company is committed to providing excellent customer service, often located in rural areas, with rapid support of corporate aircraft, Standridge Color can respond to any customer's needs within a 12 hour window, and typically, within a five hour window.

EXAMPLES OF HOW STANDRIDGE COLOR UTILIZES THEIR CORPORATE AIRCRAFT

- Quality control experts make frequent pick-ups and deliveries of rush color matches and provide hands-on support assisting with product specifications.
- Sales personnel fly extensively to visit current and potential customers in distant locations. They frequently fly those customers to their corporate headquarters to showcase their facilities and capabilities.
- Maintenance staff travel to plants located in other cities and states to upgrade machinery.

STANDRIDGE COLOR AVIATION HIGHLIGHTS

Six employees: four pilots and two aircraft mechanics

Four aircraft: three Beechcraft King Air and one Beechcraft Baron

200-300 hours flown in 2010

Of the four pilots, three were initially hired and working in other departments prior to earning their pilot's license

Corporate flight operations are based at Covington Municipal Airport

"First Impressions always make a big impact and we're proud of the Covington Municipal Airport when we bring customers to Social Circle."

- Henry Stone, Project Manager



Flowers Foods

Headquartered in Thomasville, a small town in Georgia, Flowers Foods is a leading producer and marketer of bakery products. With over 41 bakeries and annual sales of more than \$1 billion, the company offers a wide variety of fresh products are available to more than 100 million consumers. Flowers Foods is a public company in 1968 (NYSE: FLO), and has made several acquisitions; in the last seven years it has acquired several bakeries.

In the mid-1960s, owner William H. Flowers, Jr. used corporate aviation as a way to efficiently visit its bakeries and potential capital investment opportunities. Corporate aviation has played a strategic role in the company's growth and time management during ongoing operations.

Flowers Foods continues to grow its corporate aviation program, making it even more critical for the company's management to visit its bakeries across the country and meet with key customers. Corporate aviation has helped the company maintain its unique culture and get team members where they need to be when they need to be there.

FLOWERS FOODS AVIATION TIMELINE

1964 or 1965	Flowers purchases Beech E185 N42D (manufactured in 1954-55); Al Tynes, who had flown for American Airlines, was the company's first pilot		Al Tynes, the company's first pilot, pictured with the Beech N42D in 1964/1965
1965-1968	Flowers purchases Beechcraft Baron A55; John Hunt hired as new chief pilot; Don Watt later replaces Hunt		
1968 or 1969	Flowers purchases new Cessna 421		
Early 1970s	Flowers purchases Beech Baron D55		Langston S. Flowers (left) and William H. Flowers, Jr. in front of one of the company's Beech Barons sometime in the late 1970s
1973 or 1974	Flowers purchases Mitsubishi MU2 "F" model; Irv NeSmith hired as chief pilot		
Mid 1970s	Flowers purchases MU2 "J" model Beechcraft Baron		
1975	Ken Linthicum hired as pilot		Chief Pilot Ken Linthicum sits in the cockpit of one of the company's Mitsubishi Diamond jets in 1995
Late 1970s	Flowers purchases Beechcraft Baron "Model 58"; trades the MU2 "J" model for a MU2 "Solitaire" and two MU2 "Marquis"; Ken Linthicum named chief pilot in 1977		
Early 1980s	Flowers sells the Barons; retains the MU2s		
1986	Company purchases first jet—a Mitsubishi Diamond; traded all MU2s for a second Diamond jet		One of two Beech jets currently in use by the company parked outside the corporate hangar in 2011
1999	Flowers trades both Diamonds for current Beech jets		

FLOWERS FOODS AVIATION HIGHLIGHTS

Eight employees: six pilots, one aircraft mechanic, and one dispatcher

Two Beech Jets; 800 hours flown in 2010

Most bakeries are located within 15 minutes of a general aviation airport.

Vendors frequently use Thomasville Regional Airport to visit Flowers Foods' headquarters and use other general aviation airports to access other plant sites.

Using corporate aviation allows management to be in the air in 20 minutes versus a minimum of 2 1/2 hours when flying commercially.

"There is no way we could be as effective as we are if we did not have our corporate planes."

- George E. Davis, Chairman and CEO

Next Steps

- Publish Final Study Documentation in November
- Final meeting with Project Steering Committee



Questions?

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