

Tennessee Aviation System Plan (TASP) and Economic Impact Study

TDOT – Aeronautics Division Advisory Committee Meeting

Wednesday, April 22, 2020

Attendees

- George Huddleston, Tennessee Aeronautics Commission
- Butch West, Tennessee Aeronautics Commission
- Kirk Huddleston, Tennessee Aeronautics Commission
- Dan Mahoney, Tennessee Aeronautics Commission
- Michelle Frazier, TDOT - Aeronautics Division
- John Paul Saalwaechter, TDOT - Aeronautics Division
- Lyle Monroe, TDOT - Aeronautics Division
- Jacob Brooks, P.E., TDOT - Aeronautics Division
- Steve Upshaw, TDOT - Aeronautics Division
- Anna Walker, TDOT - Aeronautics Division
- John Briggs, TDOT - Aeronautics Division
- Jamal Stovall, FAA
- Roy Remington, Memphis – Millington Airport
- Robert Ramsey, Nashville International Airport & John C. Tune Airport
- John Black, Smyrna/Rutherford County
- Dan Cogan, Elizabethton Municipal Airport
- Dean Selby, Upper Cumberland Regional Airport
- Doug Kibbey, Clifton-Hassell Field
- Pragati Srivastava, Memphis Metropolitan Planning Organization
- David Lee, TDOT Long Range Planning
- Amy Kosanovic, TDOT Freight Planning
- Danielle Hagewood, TDOT Strategic Transportation Investments
- Matthew Cushing, TDOT Multimodal
- Zach DeVeau, Kimley-Horn
- Taylor Filaroski, Kimley-Horn
- Regan Schnug, Kimley-Horn
- Matt Claerbout, Garver

Meeting Introduction

Due to stay-at-home orders and travel restrictions as a result of COVID-19, the second TASP AC meeting was held virtually with Go-To Meeting. Nearly thirty people were in attendance, as shown above.

Michelle kicked the meeting off with encouragement for participants to speak up throughout the presentation. As COVID-19 continues to impact the state and nation, the project team has had to reevaluate the direction of the TASP and Economic Impact Study. While currently the project team is continuing both projects as originally planned, Michelle stressed the importance of the AC's participation and input. She also noted that although the majority of the meeting would be a presentation on the project's development, there would be scheduled breaks and pauses throughout to get everyone's feedback.

Presentation

Following Michelle's introduction, the Kimley-Horn Project Manager presented a PowerPoint (attached) that provided updates since the AC had last met, preliminary findings of the TASP and Economic Impact Study, and next steps. An outline of the presentation is provided below.

- What has happened since we last met

- Project update
- Preliminary findings
 - TASP
 - Economic Impact
 - Rates & Charges
- Additional Tasks
- Next steps

Members of the AC asked questions and provided feedback throughout the presentation. These questions, comments, and responses are organized by agenda item in the following sections.

What Has Happened Since We Last Met

This portion of the presentation primarily focused on the impact COVID-19 has had to the aviation industry and to the TASP and Economic Impact Study. The AC was asked for their feedback about the direction of the project and about the state of the aviation industry in general.

- George Huddleston, of the Tennessee Aeronautics Commission, agreed with the decision to continue the project as planned. He stated that he thinks the aviation industry will recover, but similar to after 9/11, the traveling public will change its habits. He asked if there was budget in the project to consider and/or evaluate such changed habits.
 - While the project team hasn't considered looking into this, everyone agreed it was an interesting idea and worth monitoring.
- Dean Selby, of Upper Cumberland Regional Airport, stated that he has seen a noticeable increase in calls and inquiries about charter/Part 135 services. He stated that the aviation industry may continue to see a shift from scheduled commercial operations to charter operations, which will impact both airports that have charter services and commercial service airports.
- David Lee, of TDOT Long Range Planning, noted that the division has been monitoring all traffic statewide, on both a daily and weekly basis.
- Robert Ramsey, of Nashville International Airport & John C. Tune Airport, noted that BNA was on track to experience the 95% drop in enplanements as noted nationwide.
- Roy Remington, of Memphis-Millington Airport, noted that the airport saw an uptick in charter and business jets in early April. However, now the airport has mostly been seeing military operations.

Project Update

This portion of the presentation focused on project developments since the AC last met, most notably the commencement and near-completion of airport site visits. Airport managers on the AC were asked for their input about how the site visits went.

- Roy stated that the project team helped walk him through the three surveys and answered a lot of the questions he had concerning survey questions. Roy stated that it was difficult to focus the necessary attention on the surveys, and having someone do them with him was helpful to complete them.
- Dan Cogan, of Elizabethton Municipal Airport, stated that the site visit was helpful for explaining some of the data points. A lot of the data requested in the surveys are data that airports don't necessarily track, so it was helpful to have somewhere there to explain how to arrive at a number.
- Doug Kibbey, of Clifton-Hassell Field, stated that the survey was helpful to validate some items he had been tracking.
- Dean seconded what Dan said, that the site visit helped clarify some of the data points. He also stated that the survey highlighted for him some of the inconsistencies in how airports collect data.

Airports collect data according to their own goals, and thus have varying types and quantities of data available for a statewide standardized assessments.

Preliminary Findings and Additional Tasks

This portion of the presentation focused on preliminary findings from the three surveys completed at airport site visits: the Inventory Survey, the Economic Impact Survey, and the Rates & Charges survey. Members of the AC had questions and comments about several of these findings.

- Jamal Stovall from the FAA asked several questions about drivetimes. First, he asked if non-NPIAS airports were included in the drivetime maps, since these airports still support their local communities. He also asked if new NPIAS classifications were used in determining drivetimes.
 - Non-NPIAS, public-use airports are included in all analyses, including drivetimes. The study includes 78 airports, of which 69 are NPIAS. Drivetimes are only broken out by commercial service, with 45-minute drivetime buffers, and GA, with 30-minute drivetime buffers.
- Robert asked if Nashville International responses were included in the employment numbers, as these numbers seemed a little low. A similar question was asked regarding Memphis International employment numbers.
 - BNA preliminary responses are included in all employment numbers; however, the number of BNA tenant employees has not yet been provided, so those were not included. These will increase our totals significantly. MEM employment numbers, including tenant employment, have all been provided and included in the preliminary analysis. As the project team continues gathering and verifying data, these numbers will all likely increase.
- John Black asked if the presented Rates & Charges data, including Jet-A fuel gallons sold and profit made, were just for GA. In his opinion, these numbers seemed quite low. George added that according to his calculations and based on the numbers the project team presented, Jet-A profit is \$1.12 per gallon, which seemed slightly high given discounts available to based aircraft and businesses. He stated that contract effort should be included in our analysis.
 - Rates & Charges data varies in terms of the number of airports currently reporting. For Jet-A, only 47 airports are currently reporting Jet-A fuel sales, and 43 are currently reporting Jet-A fuel profit. Additional data will be gathered once site visits are complete; many airports requested to follow up after their site visit with the exact amounts of gallons sold and profit made. The survey also requested any information that would impact fuel sales, such as discounts for based aircraft and businesses. This information will be incorporated into the study's findings.
- Jamal had further questions about the design standards findings. He asked whether the project team is looking into obstructions within the airport environs.
 - The project team has created RSAs, RPZs, ROFAs, and approach surfaces for each of the airports and are examining possible obstructions in airport approaches using the FAA's known obstruction database. JP further stated that there is a TDOT contract currently underway, separate from the TASP contract, to create a statewide RSA obstruction inventory.
- Jamal followed up by stating that the known obstruction database is frequently updated, and noted that the obstruction analysis would only be good as when the report was published.

Next Steps

The AC was asked to provide their general thoughts, questions, and comments after the conclusion of the presentation.

- Robert asked whether the project team was asking for information about taxes collected on airport property. He stated that although many airports are owned by counties and municipalities and don't have to pay property tax, many onsite businesses do.
 - The project team has been asking tenants (onsite businesses) how much they pay in property taxes. Additionally, the Economic Impact Study will have two specialized components – tax impacts, and cargo.
- George asked how the project team is checking the reasonableness of operations counts, and whether they are using any outside sources to assist with this. He mentioned a business he had heard about recently that helps collect real-time operations data at GA airports.
 - The project team stated that they know other states that have engaged with such companies, but that by nature they are rather “come and go.” For now, the project team is relying on airport-reported operations data rather than using an outside company, since that would add to project costs.

Closing Comments

Michelle thanked the AC for reconfiguring their schedules and making themselves available for a virtual meeting. She noted that the project team gathered a lot of useful information to continue implementing the TASP and Economic Impact Study. She also noted that there were some follow-up questions the project team would respond to, as well as providing a recording of the meeting and copy of the presentation.

- Note: a copy of the presentation and recording of the meeting can be found here: <https://www.tasp2040.com/public-outreach/>.

Action Items

Action	Party Responsible	Status
Update project website with meeting materials	Kimley-Horn	Complete
Complete site visits	Kimley-Horn	Ongoing
Finalize data collection	Kimley-Horn	Ongoing