**Tennessee Aviation System Plan (TASP) and Economic Impact Study**

TDOT Aeronautics Division Advisory Committee Meeting

Thursday, March 25, 2021

**Attendees**

* Michelle Frazier, TDOT Aeronautics Division
* Evan Lester, TDOT Aeronautics Division
* John Paul Saalwaechter, P.E., TDOT Aeronautics Division
* Lyle Monroe, TDOT Aeronautics Division
* Jacob Brooks, P.E., TDOT Aeronautics Division
* Anna Walker, TDOT Aeronautics Division
* Alexandria Lundberg, TDOT Aeronautics Division
* Kabrina Webb, TDOT Aeronautics Division
* Erin Mcdougal, TDOT Aeronautics Division
* Stephanie Saloom, TDOT Aeronautics Division
* John Briggs, TDOT Aeronautics Division
* Jamal Stovall, FAA
* Kirk Huddleston, Tennessee Aeronautics Commission
* George Huddleston, Tennessee Aeronautics Commission
* Butch West, Tennessee Aeronautics Commission
* Patrick Wilson, McGhee Tyson Airport
* Roy Remington, Millington – Memphis Airport
* Doug Kibbey, Clifton-Hassell Field
* Dean Selby, Upper Cumberland Regional Airport
* Pragati Srivastava, Memphis Metropolitan Planning Organization
* Amy Kosanovic, TDOT Freight Planning
* David Lee, TDOT Long Range Planning
* Danielle Hagewood, TDOT Strategic Transportation Investments
* Chanel Hippix, Southeast Tennessee Development District
* Zach DeVeau, Kimley-Horn
* Taylor Filaroski, Kimley-Horn

 **Meeting Introduction**

Due to stay-at-home orders and travel restrictions as a result of COVID-19, the fourth TASP AC meeting was held virtually via Microsoft Teams.

Evan Lester, TDOT Aeronautics Division, kicked off the meeting by introducing TDOT Aeronautics Division’s newest employees: Alexandria Lundberg, Kabrina Webb, Erin Mcdougal, and Stephanie Saloom. These new employees have become involved in the TASP and will be assisting with the end of the project. Michelle Frazier, TDOT Aeronautics Division, thanked everyone for their time and stated that the end of the project was approaching.

**Presentation Overview**

Following these introductory remarks, Zach DeVeau, the Kimley-Horn Project Manager, presented a PowerPoint that provided an update on the TASP and Economic Impact Study. An outline of the presentation is provided below.

* Since we last met…
* Project Update: Economic Impact Study
* Project Update: Existing System Performance and Future System Performance
* Next Steps

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

**Since we last met…**

This portion of the presentation focused on general project updates since December. Zach DeVeau, Kimley-Horn, noted that the Economic Impact Study had been fast-tracked in order to accommodate the January legislative session, and that in addition to the Executive Summary Brochure, more deliverables are to come. There were no questions or comments during this portion.

**Project Update: Economic Impact Study**

This portion of the presentation provided an overview of the Economic Impact Study. Zach DeVeau, Kimley-Horn, provided the statewide and Regional results of the study, including the $40 billion that Tennessee’s aviation system contributes to the state’s economy. Zach DeVeau, Kimley-Horn, also provided a brief overview of the study’s methodology, which calculates both direct and multiplier impacts from Tennessee’s aviation system.

George Huddleston, Tennessee Aeronautics Commission, asked a clarifying question about how total jobs were calculated. He asked how a company’s jobs were counted for the airport when a company has both on-airport and off-airport employees. Zach DeVeau, Kimley-Horn, clarified that in this instance, only the on-airport jobs were counted. He noted, however, that due to the multiplier impacts that were calculated as part of this study, jobs that are supported by direct impacts of airport activity are also captured.

Michelle Frazier, TDOT Aeronautics Division, stated that she likes all of the Economic Impact Study deliverables thus far. She highlighted the website in particular (<https://www.tasp2040.com/economic-impact-study/>), which provides interactive findings at a statewide, Regional, and individual airport level.

Patrick Wilson, McGhee Tyson Airport, noted that the TAACA airports are already using the results of the study. He mentioned that he had helped present to the Senate and House Transportation Committees and found the results very helpful.

David Lee, TDOT Long Range Planning, entered the following question into the meeting chat feature: “Economic Impact Analysis seems to be using Social Accounting Matrix (SAM) approach with economic multiplier. Have you used REMI or something similar? I know TNECD has a similar tool and I am wondering if you have worked with ECD already to verify your impact projection.” Zach DeVeau, Kimley-Horn, responded that the Economic Impact Study used IMPLAN and that he would be happy to provide more information about the methodology.

**Project Update: Existing System Performance and Future System Performance**

This portion of the presentation provided an overview of Chapter 2: Inventory and Existing System Performance, which had been provided to the TASP AC two weeks prior to the meeting, and Chapter 8: Future System Performance, which is forthcoming. Zach DeVeau, Kimley-Horn, and Taylor Filaroski, Kimley-Horn, presented the existing performance for a variety of performance measures (PMs), as well as the performance needed to meet future performance targets for these PMs.

George Huddleston, Tennessee Aeronautics Commission, asked if the Goal #2 PM, “Percent
of area and population within a 45-minute drive to any Tennessee commercial service airport” considered any airports that had previously provided commercial service. Taylor Filaroski, Kimley-Horn, answered that it did not. Dean Selby, Upper Cumberland Regional Airport, stated that a few airports had previously provided limited commercial service, such as Crossville Memorial Airport-Whitson Field (CSV).

Evan Lester, TDOT Aeronautics Division, stated that the Inventory and Existing System Performance Chapter illustrated a lot of interesting facets of Tennessee’s aviation system. He was particularly interested to note how many types of businesses rely on Tennessee aviation, from medical services to agriculture.

George Huddleston, Tennessee Aeronautics Commission, asked if the airports noted as having the potential to serve business aircraft as part of the Goal #5 PM, “Population and area within a
45-minute drive time of an airport meeting business aircraft needs” future performance had been vetted for feasibility. He noted that the only criteria they were missing to serve business users is a 5,500-foot runway, but such a runway extension at many airports is not feasible. Taylor Filaroski, Kimley-Horn, responded that the Future System Performance Chapter will address the runway extension needed at each airport in order to meet this target. She added that the intention of the future performance of this PM is not that all airports will receive the additional criterion, but that it will enable TDOT Aeronautics Division to prioritize potential projects in order to increase access to airports that serve business aircraft.

Dean Selby, Upper Cumberland Regional Airport, had a question about this same PM. He asked if the PM only evaluated population within a 45-minute drive time of an airport meeting business aircraft needs, or if business saturation was included as well. Zach DeVeau, Kimley-Horn, responded that just population was calculated. Dean Selby, Upper Cumberland Regional Airport, expanded on his question to note that business saturation may be a better factor to consider. For instance, the drive time for a given airport may show a high population concentration, but this may include a retirement community that may not frequently use the airport. However, the drive time for another airport may show a low population concentration but include aviation-reliant businesses that would result in greater use of that particular airport. Zach DeVeau, Kimley-Horn, noted his agreement and said that the team could determine the feasibility of this analysis.

Evan Lester, TDOT Aeronautics Division, also noted his interest that Tennessee’s aviation system has over 4,000 based aircraft, including a reported 220 businesses with based aircraft. This shows that the system is robust and that a considerable number of businesses rely on Tennessee aviation.

Roy Remington, Millington – Memphis Airport, noted that he has been sharing TASP and Economic Impact Study information with his local elected officials. He noted that they frequently ask what the needs of the system are and asked if the TASP cost estimates are ready to be shared. Zach DeVeau, Kimley-Horn, noted that the cost estimates task is currently underway, but no findings are able to be shared at this time. However, the findings are on their way and will be provided to the TASP AC. John Paul Saalwaechter, P.E., TDOT Aeronautics Division, stated that for a sense of magnitude as to what the TASP cost estimates will ultimately show, the APMS study that was completed in September showed a total need of $462.2 million for pavement alone in the state. The cost estimates for all airport projects will be much higher. Roy Remington, Millington – Memphis Airport, stated that this was a telling number, but a number of such magnitude is difficult for elected officials to grasp. A breakdown of costs per fiscal year would be helpful. Zach DeVeau, Kimley-Horn, noted that cost estimates will be provided as part of three phases: Less than 5 years, 5 to 10 years, and greater than 10 years. This may be helpful to break the cost estimates into “buckets” for elected officials. Evan Lester, TDOT Aeronautics Division, added that there will be a TASP Executive Summary at the end of this project that will provide further detail on this topic.

**Next Steps**

Zach DeVeau, Kimley-Horn, provided an overview of what drafts would be provided next to the TASP AC. For the TASP, Chapter 8: Future System Performance will be provided next. For the Economic Impact Study, the individual airport brochures will be sent out next.

Note: a copy of the presentation provided at the meeting can be found here: [www.tasp2040.com/public-outreach/](http://www.tasp2040.com/public-outreach/).

# **Action Items**

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| **Action** | **Party Responsible** | **Status** |
| Update project website with meeting materials | Kimley-Horn | Complete |
| Provide Chapter 8: Future System Performance | TDOT and Kimley-Horn | Upcoming |