

**Contra Costa County Airports Division
Economic Impact Assessment
For
Buchanan Field and Byron Airport**



**Prepared for Contra Costa County Airports Division
By Mead & Hunt, Inc.
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Executive Summary

The place you want to be... Contra Costa County Airports

The Contra Costa County Airports Division operates Buchanan Field (CCR), which is one mile northwest of Concord and Byron Airport (C83), three miles south of Byron, along the eastern border of the County. The County is home to a population of 1.1 million people and counting. Only a short distance from the Bay area and beautiful wine country, both airports offer flexibility for many users, and support general aviation (GA) and occasional military activity, with Buchanan Field supporting operations by scheduled commercial service, business, and recreational GA.

Contra Costa County Airports are the place to be for first-class aviation operations and programs that meet the needs of families, aviation enthusiasts, experienced pilots, and those learning to become a pilot.

Why complete an Economic Impact Assessment?

This report summarizes the findings from the Economic Impact Assessment (EIA) to illustrate the significant and positive economic impacts CCR and C83 have in the local and regional community. The results indicate that the County already has healthy economic diversity across industries, and that the airports contribute to the flow of revenue within the County and beyond.

Economic Setting

EIA results are highly dependent on the economic climate when the assessment was performed. EIAs conducted during periods of growth return higher numbers than those performed during recessions. During recessions, when one industry reduces capital spending, that decrease can lead to a negative ripple effect through the industries of suppliers if it is not offset by economic growth elsewhere. The recession that began in 2008 was economy-wide and reduced employment and spending across the board. Recessions diminish the spending between industries, cutting jobs, wages, and sales for direct impacts, and reducing indirect and induced impacts.

DEFINITIONS

DIRECT IMPACTS: This includes any value that ties directly to airport activities, such as jobs, operations and production by on-airport businesses and spending by air passenger visitors to Contra Costa County airports.

INDIRECT IMPACTS: This includes any value that supports airport activities indirectly, and would be negatively impacted if the airport weren't there. For example, when airport staff purchases office supplies or when an FBO purchases fuel from a distributor.

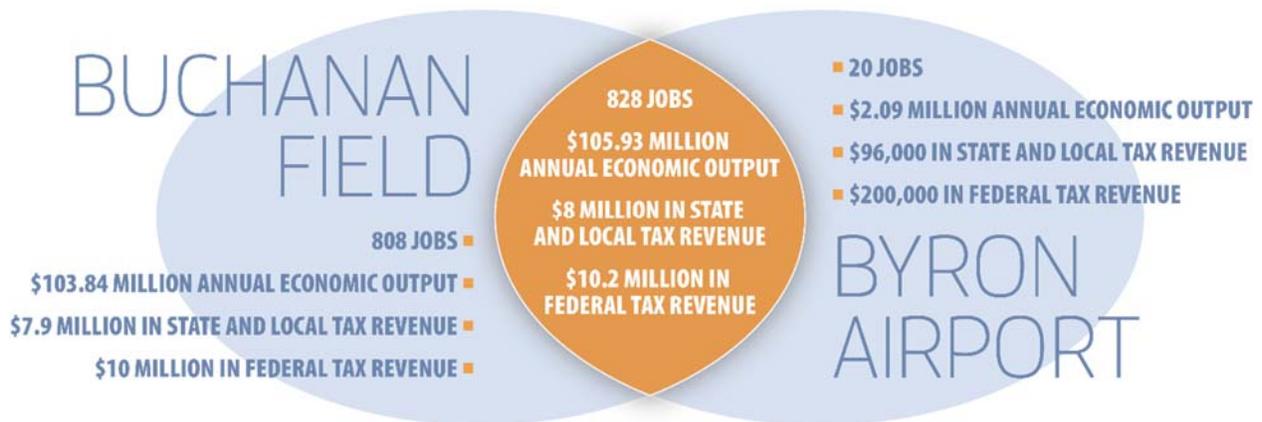
INDUCED BENEFITS: This includes any value that is generated by re-spending of the income derived from the direct and indirect spending, moving revenue through the local economy and outward to impact the greater regional economy. As in the case of the previous office supply purchase example, this would mean the wages paid to the office supply store employees, as well as the revenue paid to the producer of the office supplies and the wages paid to their employees, etc.

ECONOMIC OUTPUT: A sum of the value added through direct, indirect, and induced impacts, and is expressed as a dollar amount.

For this EIA, data was gathered in 2016, when the U.S. economy was in recovery from the 2008 recession. So far, this recovery has been promising in terms of positive impacts to the economic output for the Contra Costa County Airports Division compared to what output might have been if the EIA was performed in previous years. However, employment has not returned to pre-recession levels, and businesses across industries continue to do more with less. Economic impact per employee is up, but overall impact and employment still lag behind pre-recession levels. As the economy continues to recover, the economic output is expected to continue to grow.

Economic Impact Snapshot

The EIA demonstrates that CCR and C83, operated by the Contra Costa County Airports Division, annually generate significant impacts in terms of economic output. Contributions through taxes and fees support social, health, emergency response, infrastructure, and economic development initiatives throughout the County, state and country. With funds that exceeded the Airports' needs for operational expenses, **in Fiscal Year 2015-2016, the tax revenues associated with the airports and aviation activities contributed \$2.7 million dollars to the County's General Fund and \$1.2 million to the schools.** The following illustration depicts the individual contributions by airport to the overall annual regional economic output.



Visitor Spending

Visitor spending is measured in terms of hotels, restaurants, entertainment and shopping, as these tend to be the needs of general aviation travelers. GA users tend to find the privacy of GA travel appealing. For this reason, gathering reliable data on the purpose of a visiting GA user's trip can be difficult, much less tracking how much they spent in the community and on what. Fortunately, average daily expenditure numbers are available that have been used for other regional economic impact assessments and that can be applied to the GA visitors to CCR and C83.

For CCR, the study calculated how long the visitor stayed based on Flightaware.com information and estimated passenger numbers based on aircraft seating capacity and anecdotal information from fixed-



base operators. These estimates indicate that visitors flying through CCR contributed \$5.3 million to the economic output.

For C83, estimates were calculated based on FAA flight records, making adjustments for aircraft based at the Airport. The estimates indicate that the C83 GA visitor spending contributed \$316,268 of economic output.



Airport/Community Value

Contra Costa County Airports Division offers value to the community that extends well beyond the jobs, economic output, and taxes generated by the Airports and their associated businesses. CCR serves as a base for two air ambulance service providers that fly critically injured patients to specialized care facilities in the area. These ambulance services also provide emergency transport for organs needed for transplants and medical supplies when time is of the essence.

The airports operate as an enterprise fund, generating their own revenue to cover expenses. Contra Costa County Airports Division reimburses the County for airport-related expenses (such as maintenance work), providing a source of revenue for other public services.

Aircraft, tenant-owned and tenant-leased buildings are subject to taxes collected by the County. In Fiscal Year 2015-2016, taxes collected related to aviation and airport activities provided \$2.7 million to the County and \$1.2 million to the schools. When compared to four years ago (FY 2011-2012), taxes related to aviation and airport activities are up 37 percent and to the schools, 27 percent.

Summary and Findings

In summary, Buchanan Field and Byron Airport support over 828 jobs and \$105,930,000 in total annual economic impacts. These two airports contribute \$18,300,000 in local, state and federal taxes, and the jobs located on airport property provide wages exceeding \$43,890,000. In the last fiscal year, these airports contributed \$2.7 million to the County's General Fund and \$1.2 million to the schools, which is an increase of 37 percent and 27 percent, respectively, over four years ago.

The benefits of the airports within the community extend beyond economic impacts to items not discussed in the report. A sample of these benefits include:

- **Air Ambulance, Sherriff and Emergency Services** provide an essential service to County residents in a time of need, transporting patients in critical condition to care facilities in the region.
- **Flight training and Community Education Businesses** provide essential training to those interested in careers in the aviation industry. Many commercial airline pilots got their start at airports like CCR and C83.
- **Recreation Businesses**, such as skydiving and air travel businesses, provide County residents with opportunities to fly and travel for leisure.
- **Aircraft Storage and Maintenance Facilities** allow County residents to store their aircraft close to home and business. The Airports are an important economic development tool for the communities that they serve, and provide investors and job creators with easy access to the communities.



1. Introduction and Study Methodology

The EIA for Buchanan Field (CCR) and Byron Airport (C83) measures the impact of the airports to the economy of Contra Costa County, California, in terms of jobs and output.

CCR is one mile northwest of downtown Concord and C83 is three miles south of Byron. The Contra Costa County Airports Division operates both airports. CCR supports operations by scheduled commercial passenger aircraft, business and recreational general aviation (GA), and occasional military aircraft. C83 does not have scheduled commercial service, but does support GA and occasional military activity. Airport locations are shown in **Exhibit 2** at the end of this document. Socioeconomic data for Contra Costa County gathered from “Impacts for PLANning” (IMPLAN) modeling software and the U.S. Census Bureau are shown in **Table 1**. A summary of the top ten industries in Contra Costa County by employment, labor income, and economic output are included in **Exhibit 3** at the end of this document.

Table 1: Local Socioeconomic Data	
Category	Contra Costa County
Gross Regional Product ¹	\$63.9 Billion
Total Personal Income ¹	\$71.7 Billion
Total Employment ¹	524,255
Population ¹	1,111,339
Total Households ¹	391,098
Median Household Income ²	\$79,799
Median Age ²	39.5

Source: (1) IMPLAN 2016, (2) U.S. Census Bureau 2016
Categories are 2014 values.

The EIA uses industry standard “input/output” economic modeling to evaluate how businesses across different industries relate to one another in the County. Input/output modeling allows analysts to take known data for aviation-related jobs and economic output and identify unknown indirect and induced jobs and economic output that are supported by the aviation activities. Focusing the analysis on Contra Costa County shows how the Airport is a regional economic generator with influence beyond its property line. Data for individual businesses come from surveys, like the **Exhibit 8** sample survey at the end of this document, which were sent to on-airport businesses. For businesses that were not surveyed or chose not to participate, data was collected through a business to business database.

The IMPLAN model outputs the direct, indirect, and induced economic impact of business and aviation activity at CCR and C83. Classifying the economic output across these three categories identifies jobs and total output directly supported by the airport and aviation activity, and highlights how income associated with jobs and activities is redistributed within the region, supporting additional jobs and output.

The two airports support additional economic activity beyond the direct economic output by aviation-related businesses and associated indirect and induced impacts. Visitors come to Contra Costa County by air and stimulate economic activity through their spending within the community. An important distinction exists between air travelers as visitors to the community and the residents themselves of Contra Costa County. The economic impact is modeled only for visitor spending because residents would spend their money in the community whether the Airport was there or not.



2. Economic Impact Assessment Process

An EIA has a defined workflow that guides analysis. The first step defines what is to be studied and what time period is being studied. The focus of the EIA is the two airports managed by the Airports Division and the economic impact that they generate in the County, and the time period is calendar year 2015. The purpose of the EIA for the airports is to provide the Airports Division, County officials, and stakeholders with a picture of how the airports fit into the greater regional economy of Contra Costa County. People know that the airports support jobs and economic output of aviation-related businesses on airport property; however, the effect of this output extends to other businesses in the community. The previous EIA was performed in June 2000, and much has changed in aviation and in the County since then. This EIA will describe the direct, indirect, and induced economic impacts of the airports and associated businesses using the most recent data available. As mentioned earlier, that is 2015 business data from surveys and ESRI Business Analyst, and an economic model of Contra Costa County produced at the end of 2014. The 2014 economic model is the latest available at the time of the EIA. By running the model using inflation/deflation calculations, the dollar values shown are 2015 dollars.

Economic Impact Assessment Steps

- 1 Define What is Being Studied and When
2. Define Study Area
3. Collect Data from Study Area
4. Filter Data for Relevance
5. Input Data Into IMPLAN
6. Review Outputs, Adjust Inputs

The second step is to define the EIA study area geographically. CCR is north of downtown Concord and is centrally located north of the geographic center of Contra Costa County. C83 is located on the southeastern border of the County, near San Joaquin and Alameda counties. The

Table 2: Regional Airports by Distance and Level of Service			
Airport (Code)	Driving Distance		Level of Service
	CCR	C83	
Napa County (APC)	28	60	General Aviation
Oakland Int'l (OAK)	31	48	Commercial
Livermore Municipal (LVK)	32	24	General Aviation
Rio Vista (O88)	33	33	General Aviation
Hayward Executive (HWD)	38	45	General Aviation
Tracy Municipal (TCY)	49	18	General Aviation
San Jose Int'l (SJC)	53	60	Commercial
San Francisco Int'l (SFO)	40	65	Commercial

Sources: maps.google.com, FAA National Plan of Integrated Airport Systems (2015)

The IMPLAN model estimated the 2014 Contra Costa County population to be 1.1 million. Much of that population lives along Interstate 680 and State Highway 4, which intersect immediately northwest of CCR. The U.S. Census Bureau estimates one million people live within a 30-minute drive of CCR and 328,000 live within 30 minutes of C83. Airports typically have a regional impact; however, several nearby commercial service and GA airports with which CCR and C83 compete influenced geographic reach of the study area. Nearby airports and their service level are shown in **Table 2**. Given that the Airports are run by the County, and CCR is within a 30-minute drive of most of the County's population, the study area is defined as Contra Costa County. There is likely some spill over into adjacent counties; however, the focus of the EIA is on the economic impact to Contra Costa County.



The third step is to collect data from the study area. Data collection for an airport EIA requires a mixture of data mining, industry expertise, and local knowledge. During the fourth step, filtering the data means it is necessary to determine whether or not on-airport and near-airport businesses are *airport-related*, and rely on the existence of the airport for some aspect of their business; *aviation-related*, and rely on air travel to support their business but do not necessarily operate their own aircraft; or are *non-airport-related* and *non-aviation-related*, and are located where they are for other reasons. Accurately determining where the businesses fit into these categories is critical to avoid understating or overstating airport economic impact. Inclusion of non-airport related businesses can jeopardize the integrity of an EIA.

Examples of airport-related businesses that are easy to identify include flight schools, the Airports Division, fixed-base operators (FBOs), and emergency response providers. Examples of airport related businesses that are less easily identified include businesses that rely on aviation to move people and products in support of a non-aviation-related core business. Examples may include retail stores that fly managers to job sites and survey firms that use aerial photography.

Examples of non-airport related businesses that may be located on an airport include storage yards (for businesses that do not move products by air), offices (for businesses that could just as easily be located farther away from the airport without adverse impact), and food and retail establishments. These businesses are often included in indirect and induced impacts. Businesses located near an airport that also cater to non-airport customers, such as hotels located near the airport and a freeway interchange, serve both airport and non-airport customers. The aviation-related aspect of these business is measured by the amount of time and money airport visitors spend while visiting the community. The Airports Division owns property that is leased to many non-airport related businesses surrounding CCR. These businesses are counted separately from the airport-related businesses.

Data collected from survey respondents and the ESRI Business Analyst is filtered to categorize non-airport-related businesses prior to entry into IMPLAN. With guidance from the Airports Division, the Consultant determines into which category a business falls. Datasets are inputs into IMPLAN from the sources as described in **Table 3**.

Table 3: Contra Costa County Airports Division EIA Data Summary		
Dataset	Purpose	Source (Year)
Contra Costa County Economic Model	Shows industry linkages	IMPLAN (2014)
CCR and C83 Airport Business Surveys	Shows jobs, wages, and business sales	Businesses around the Airport (2016)
ESRI Business Analyst Data	Fills in gaps of CCR and C83 Airport Business Surveys	ESRI (2016)
Aviation Activity (Itinerant GA operations)	Part of equation to determine the number of air visitors	FlightAware.com (2015)

Source: Mead & Hunt, 2016.



ESRI Business Analyst data is not acquired for all of Contra Costa County because most businesses in the County are not directly related to aviation, although many experience indirect and induced impacts associated with having the Airport in their community. ESRI Business Analyst data is limited to businesses with airfield access at CCR and C83, and those with immediate proximity to the Airport. A graphic showing the locations of business at CCR picked up by the ESRI Business Analyst data is included in **Exhibit 9** at the end of this document. The IMPLAN data for C83 relied on business surveys and airport operations staff interviews.

There are many commercial and industrial businesses surrounding CCR. Most of these businesses do not have airfield access and are not aviation-related; however, some lease their property from the Airport. There are 18 airport-related and aviation-related businesses and 21 non-aviation businesses that lease property from the Airport included in the ESRI Business Analyst data. There were 2 aviation-related businesses at C38.

The fifth step is to input data into the model. Information is entered into IMPLAN across four categories: industry sales, employment, employee compensation, and proprietor income. Industry sales and employment totals are available from the ESRI Business Analyst data, and businesses that responded to the surveys provided industry sales, employment, and employee compensation. The IMPLAN dataset contains industry average multipliers to estimate missing information. Preference is given to survey data over ESRI Business Analyst data in instances where both exist.

The sixth step pertains to the results of the EIA, and is covered in **Section 3**.



3. Economic Impact

IMPLAN organizes inputs into “activities” that have sub-categories called “events.” Activities in the Airports Division’s EIA include the economic impact of aviation-related businesses, non-aviation businesses, air visitor spending, and airport construction activities. These activities are separated because of the level of data specificity available to calculate the economic impact of each, and because of how they do or do not require the use of the airports for aviation purposes.

The economic impact model of aviation-related businesses and non-aviation businesses uses survey data, supplemented with ESRI Business Analyst data, and is specific to individual businesses. This degree of precision allows customization for business-specific situations and provides a high degree of confidence that the resulting economic impact figures are representative of what is truly occurring in the region. Construction expenditures use data from the Airport on how much was spent per year, but exclude surveys from the construction companies on how they used the revenue. The economic impact of air visitor spending relies airport management records, flight records, and on industry averages for consumer spending. An in-person survey of air travelers was not done as part of this effort. Expenditures by air travelers are applied to an entire industry (such as hotels, restaurants, and entertainment establishments), and not a specific business.

An example of the difference in specificity between the two activities is restaurant spending. For the aviation-related business, the name of the restaurant is known, as is its location, how many employees it has, what their compensation is, and what the restaurants sales are. For air visitor spending, the name and location of restaurants are not known – only an estimate of how much (on average) air visitors spent at restaurants in Contra Costa County over the course of a year. Despite this lack of specificity, IMPLAN has County-specific industry averages so that if the amount spent on restaurants is known, IMPLAN can calculate how many employees this expenditure supports and how this impacts the industry’s output.

The economic impacts of aviation-related businesses, non-aviation-related businesses, construction expenditures, and air visitor spending for each airport are described in the following sections. The sum of the four activities represents the economic impact of the airports. Analysis uses 2015 dollars and adjusts inputs to reflect inflation.

3.1 Buchanan Field (CCR)

Buchanan Field is the most developed of the two facilities operated by the Airports Division and features 18 aviation-related businesses on the property, including the Airports Division office. The Airports Division leases property to 21 non-aviation businesses at CCR that provide an outside revenue stream. These non-aviation businesses are included as an economic impact attributed to the Airports Division because actions of the Airports Division have made it possible for these businesses to establish and operate. They are separate from aviation-related businesses because they do not require runways and helipads to operate, and could continue to exist in their current location even if CCR were closed.

3.1.1 CCR Aviation-Dependent Businesses

Aviation-related businesses at CCR include, but are not limited to, fixed-base operators, the Airports Division, the control tower, flight school, air charter service, and air ambulance companies. Expenditures associated with general maintenance and repair are included here, and not in **Section 3.1.3**. These businesses support 83 jobs and contribute \$14.49 million to the annual regional economic output. These businesses purchase goods and services from other businesses in the County, and proprietors and employees spend their wages and pay taxes, triggering indirect impacts. The businesses and taxing authorities indirectly impacted in turn purchase goods and materials, and their proprietors and employees spend their wages and pay taxes, which triggers induced impacts. Total impact for aviation-related businesses, which includes direct, indirect, and induced impacts across Contra Costa County, is 150 jobs and a \$24.87 million impact to annual regional economic output. A summary of economic impact by aviation-related businesses is included in **Table 4**.

Impact Type	Employment (Total Jobs)	Labor Income	Value Added	Output
Direct	83	\$8,010,000	\$10,250,000	\$14,490,000
Indirect	31	\$1,900,000	\$2,960,000	\$5,020,000
Induced	36	\$1,820,000	\$3,360,000	\$5,360,000
Total Impact	150	\$11,730,000	\$16,570,000	\$24,870,000

*Note: Money in 2016 values. Output includes income and value added; do not add categories in the same row together.
Source: Mead & Hunt, 2016; IMPLAN, 2016*

Aviation-related businesses support many industries across Contra Costa County. Top industries are related to flight training, referred to in IMPLAN as “other educational services,” and air ambulance, or “other ambulatory health care services.” Fixed-base operators and airport management and administrative functions fall under “sightseeing transportation and support activities for transportation,” parts manufacturers and installers fall under “wholesale trade,” and car rental agencies fall under “auto equipment rental and leasing.” A summary of the top industries by jobs created and economic output are shown in **Table 5**. More detailed results are included in **Exhibit 4** at the end of this document.

Rank	Employment	Jobs	Economic Output	Millions
1	Other Educational Services	23	Other Ambulatory Health Services	\$4.04
2	Other Ambulatory Health Services	21	Wholesale Trade	\$3.69
3	Scenic and Sight Seeing Transportation and Support Activities for Transportation	18	Scenic and Sight Seeing Transportation and Support Activities for Transportation	\$3.51
4	Insurance Agencies, Brokerages, and Related Activities	13	Insurance Agencies, Brokerages, and Related Activities	\$2.33
5	Wholesale Trade	8	Automotive Equipment Rental	\$1.07

*Note: Money in 2016 values. Output includes income and value added; do not add categories in the same row together.
Source: IMPLAN, 2016.*

Aviation-related businesses make up 19 percent of employment and 24 percent of economic output generated by CCR. The percentages differ because many on-airport jobs are often technical or managerial in nature, and thus have higher average salaries than some of the retail and service industry jobs in other categories described in the following sections.



3.1.2 CCR Non-Aviation Businesses

Non-aviation-related businesses at CCR include, but are not limited to, retail stores, restaurants, a golf course, automobile sales, and hotel. These businesses support 384 jobs and contribute \$42.81 million to the annual regional economic output. Like aviation-related businesses, economic activity associated with non-aviation businesses triggers indirect and induced economic impacts. Total impact for non-aviation businesses, which includes direct, indirect, and induced impacts across Contra Costa County, is 551 jobs and a \$67.89 million impact to annual regional economic output. A summary of economic impact by non-aviation-related businesses is included in **Table 6**.

Impact Type	Employment (Total Jobs)	Labor Income	Value Added	Output
Direct	384	\$17,190,000	\$23,750,000	\$42,810,000
Indirect	86	\$5,300,000	\$8,100,000	\$12,880,000
Induced	81	\$4,160,000	\$7,640,000	\$12,210,000
Total Impact	551	\$26,650,000	\$39,490,000	\$67,900,000

*Note: Money in 2016 values. Output includes income and value added; do not add categories in the same row together.
Source: Mead & Hunt, 2016; IMPLAN, 2016.*

Top non-aviation industries are related to various forms of retail and architectural/engineering design. A summary of the top industries by jobs created and economic output are shown in **Table 7**. More detailed results are included in **Exhibit 5** at the end of this document.

Rank	Employment	Jobs	Economic Output	Millions
1	Retail – General Merchandise	139	Architectural/Engineering Services	\$15.14
2	Architectural/Engineering Services	68	Retail – General Merchandise	\$8.88
3	Retail – Sporting Goods, Hobby, Musical Instruments	44	Construction of other nonresidential structures	\$3.60
4	Hotels and Motels	35	Retail – Sporting Goods, Hobby, Musical Instruments	\$3.56
5	Limited-Service Restaurants	22	Hotels and Motels	\$3.46

*Note: Money in 2016 values. Output includes income and value added; do not add categories in the same row together.
Note: Retail – Sporting Goods includes now closed retailer Sports Authority. Sports Authority was open when the EIA was performed. The building exists and appropriate zoning is in place for another retail operation to occupy the building in the future. Economic impact should be reevaluated at this time.
Source: IMPLAN, 2016.*

Non-aviation-related businesses make up 68 percent of employment and 64 percent of economic output generated by CCR.



3.1.3 CCR Construction Expenditures

Construction expenditures include engineering and architectural design, construction administration and labor, and the amount spent on construction materials. They do not include general maintenance and repair, which is included in **Section 3.1.1**. Airport construction activities can be highly variable depending on the work that needs to be done. For this reason, construction impacts are typically calculated on a project-specific basis. To provide a sense of how much an “average” construction season impacts the local economy, construction impacts are calculated using the average expenditure from 2013 to 2015. The results are shown in **Table 8**.

Table 8: Economic Impact of Construction Activities at CCR				
Impact Type	Employment (Total Jobs)	Labor Income	Value Added	Output
Direct	22	\$1,600,000	\$1,970,000	\$3,730,000
Indirect	6	\$370,000	\$580,000	\$990,000
Induced	7	\$360,000	\$670,000	\$1,070,000
Total Impact	35	\$2,330,000	\$3,220,000	\$5,790,000

*Note: Money in 2016 values. Output includes income and value added; do not add categories in the same row together.
Source: Mead & Hunt, 2016; IMPLAN, 2016.*

Construction expenditures primarily support construction and architectural engineering industries. Indirect and induced impacts support retail and restaurant industries. Construction impact is highly sensitive to the amount of materials purchased in the study area and the use of labor that lives in the study area. This will vary from project to project, which is another reason why construction impacts are typically assessed on a project by project basis. Construction activities make up four percent of employment and six percent of economic output generated by CCR.

3.1.4 CCR GA Visitor Spending

GA visitor spending measures how passengers and pilots of GA aircraft contribute to the regional economy. GA visitors were identified by using data from FlightAware.com, which reports what type of aircraft visited CCR, where the aircraft came from, and how long the aircraft stayed. FlightAware data is a sample and does not represent a census of all GA visitors, so this EIA used aircraft operations data from the control tower to fill in the gaps. The variables of greatest relevance are how many people were on the aircraft and how long they stayed in the community.

FlightAware data includes aircraft owner information for most aircraft. This facilitated removal of flights by aircraft whose owners lived in Contra Costa County. County residents are not measured because they do not represent economic activity that the Airport is bringing into the community. If these residents own businesses on or near the Airport, as several of them do, then this economic activity is captured in **Section 3.1.1** and **Section 3.1.2**.

GA travelers tend to prefer that the details surrounding their activities remain private, and a statistically significant survey of GA travelers is a major undertaking that is beyond the scope of this study. In the absence of GA passenger survey data, visitor stay characteristics were calculated using average stay from FlightAware information, and passengers per aircraft were estimated based on seating capacity and anecdotal information from fixed-base operator staff.



GA visitor spending is measured across four categories: lodging, food and beverage, entertainment, and general retail. GA visitor spending does not include money spent on rental cars or fuel and maintenance for GA aircraft as these expenditures are accounted for in the sales figures of aviation-related businesses like the rental car companies and the fixed-base operators. A summary of economic impact by air visitors is included in **Table 9**.

Table 9: Economic Impact of GA Visitors at CCR				
Impact Type	Employment (Total Jobs)	Labor Income	Value Added	Output
Direct	60	\$1,590,000	\$1,900,000	\$3,390,000
Indirect	5	\$320,000	\$540,000	\$870,000
Induced	7	\$350,000	\$650,000	\$1,040,000
Total Impact	72	\$2,270,000	\$3,090,000	\$5,300,000

*Note: Money in 2016 values. Output includes income and value added; do not add categories in the same row together.
Source: Mead & Hunt, 2016; IMPLAN, 2016.*

Air visitor spending supports a narrower band of industries than aviation-related and non-aviation-related businesses. This is because air visitors tend to have focused needs of lodging, food, and entertainment. Business transactions conducted by air visitors are captured by indirect and induced effects. Top industries are shown in **Table 10**. More detailed results are included in **Exhibit 6** at the end of this document.

Table 10: Air Visitors—Top Industries by Jobs and Economic Output at CCR				
Rank	Employment	Jobs	Economic Output	Millions
1	Full Service Restaurants	52	Full Service Restaurants	\$2.58
2	Hotels and Motels	7	Hotels and Motels	\$0.65
3	Motion Picture and Video Industries	1	Real Estate	\$0.25
4	Real Estate	1	Motion Picture and Video Industries	\$0.18
5	Services to Buildings	1	Owner-Occupied Dwellings	\$0.16

*Note: Money in 2016 values. Output includes income and value added; do not add categories in the same row together.
Source: IMPLAN, 2016.*

GA visitors supported nine percent of employment and five percent of economic output generated by CCR. The reason for the higher number of employees and lower value of economic output than aviation-related businesses has to do with employee make up. Industries like restaurants, hotels, and retail stores tend to have more employees with lower average salaries than do managerial and technical jobs found in the aviation-related businesses. The indirect and induced impacts are also lower because these employees have less money to spend. Further, businesses like hotels, restaurants (specifically non-franchise chains), and retail take a higher proportion of revenues out of the region than do fixed-base operators and aircraft maintenance shops.



3.1.5 CCR Airport Economic Impact

The economic impact of CCR is the combination of the economic impacts of aviation-related businesses, non-aviation businesses on Airports Division property, construction expenditures, and GA visitor spending. Profiles of these four activities are described in **Section 3.1.1** through **Section 3.1.4**. Airport economic impact includes direct, indirect, and induced jobs, and shows how the Airport supports activities well beyond its property. A summary of airport economic impact is presented in **Table 11** and **Table 12**.

Impact Type	Employment (Total Jobs)	Labor Income	Value Added	Output
Direct	548	\$28,400,000	\$37,870,000	\$64,400,000
Indirect	129	\$7,880,000	\$12,180,000	\$19,750,000
Induced	131	\$6,700,000	\$12,320,000	\$19,680,000
Total Impact	808	\$42,980,000	\$62,370,000	\$103,840,000

*Note: Money in 2016 values. Output includes income and value added; do not add categories in the same row together.
Source: Mead & Hunt, 2016; IMPLAN, 2016.*

Impact Type	Employment (Total Jobs)	Labor Income	Value Added	Output
Aviation Businesses	150	\$11,730,000	\$16,570,000	\$24,860,000
Non-Aviation Businesses	551	\$26,650,000	\$39,490,000	\$67,900,000
Construction	35	\$2,330,000	\$3,220,000	\$5,780,000
GA Visitors	72	\$2,270,000	\$3,090,000	\$5,300,000
Total	808	\$42,980,000	\$62,370,000	\$103,840,000

*Note: Money in 2016 values. Output includes income and value added; do not add categories in the same row together.
Source: Mead & Hunt, 2016; IMPLAN, 2016.*

CCR supports **808 jobs and contributes \$103.84 million in annual economic output** in Contra Costa County directly through aviation-related businesses, non-aviation businesses, construction activities, and GA visitors, and indirectly and induced through expenditures of these industries. The industries with the greatest benefit from CCR are shown in **Table 13**. More detailed results are included in **Exhibit 7** at the end of this document.

Rank	Employment	Jobs	Economic Output	Millions
1	Retail – General Merchandise	141	Architectural/Engineering Services	\$16.03
2	Architectural/Engineering Services	73	Retail – General Merchandise	\$9.04
3	Full-Service Restaurants	66	Construction of Other Nonresidential Structures	\$6.61
4	Retail – Sporting Goods, Hobby, Musical Instrument	44	Wholesale Trade	\$6.44
5	Hotels and Motels	41	Real Estate	\$4.49

*Note: Money in 2016 values. Output includes income and value added; do not add categories in the same row together.
Source: IMPLAN, 2016.*

The top industries supported by CCR are not aviation-related due to the large number of employees located on property leased by the Airports Division.



3.1.6 CCR Airport Tax Impact

An airport sponsor’s investment in an airport comes back to the region in many ways. As shown in **Section 3.1.5**, CCR generates \$103.84 million in economic output for the region. Many businesses benefit from the Airport that have no financial stake in operation, upkeep, or expansion of airport facilities. Included in the \$103.84 million of output are local, state, and federal taxes that go on to support a diverse range of programs locally, and across California, the United States, and the world. IMPLAN calculates taxes based on economic activities including business sales and income, employee wages, and proprietor income. Taxes are categorized as follows: employee compensation, proprietor income, production and imports, households, and corporations. The term “taxes” includes social security, income tax, fines and fees, property tax, vehicle licensing, game hunting permits, dividend tax, and corporate tax. Tax generation associated with CCR is presented in **Table 14**.

Table 14: Annual Taxes Related to CCR Economic Impact					
Jurisdiction	Employee Compensation	Proprietor Income	Production and Imports	Households	Corporations
State/Local	\$92,649	\$0	\$5,939,584	\$1,700,331	\$167,012
Federal	\$4,295,815	\$282,554	\$684,543	\$3,874,646	\$954,834

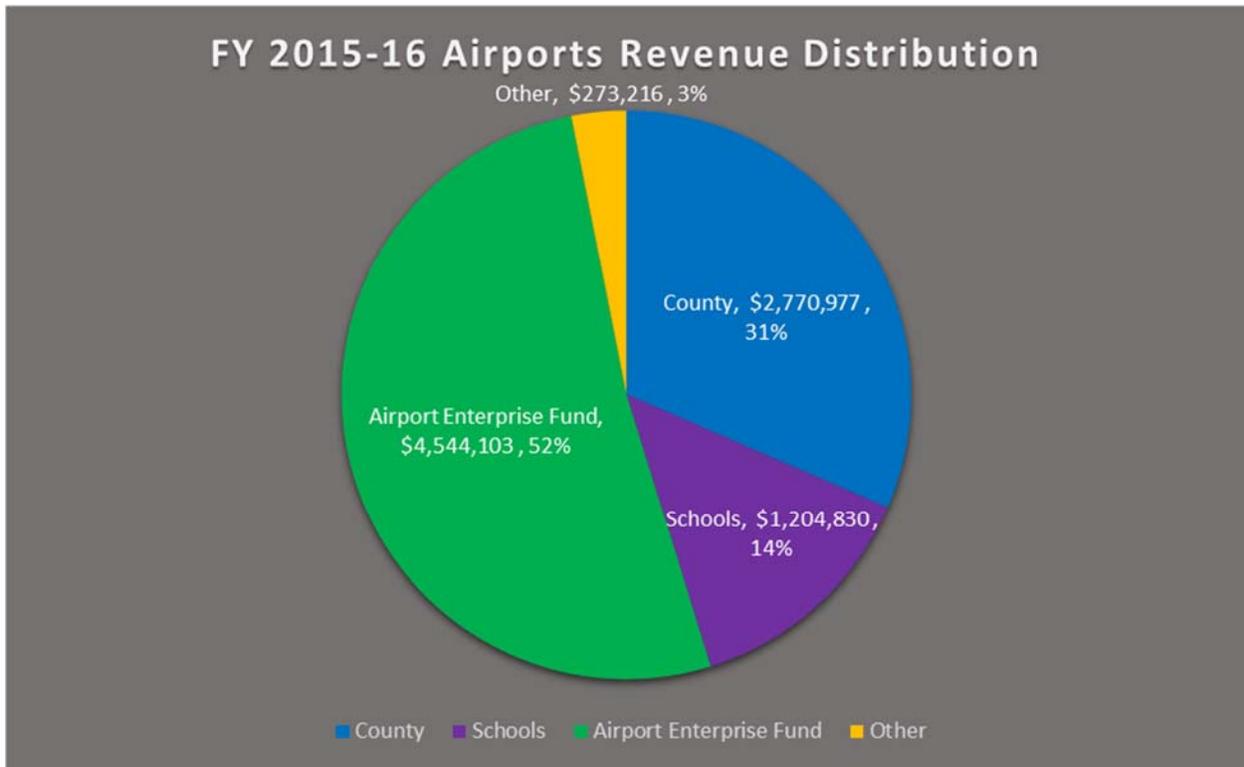
*Note: Money in 2016 values.
Source: IMPLAN, 2016.*

The Airport and associated economic activity provide \$7.9 million in state and local tax revenue and \$10 million in federal tax revenue. Some of this money is reinvested in the community through programs ranging from health care, emergency services and education to economic development, although this governmental reinvestment is too far removed from aviation activities to be included with the Airport’s economic impact.

The Airports Division operates as an enterprise fund, meaning that it generates revenues to cover its expenses, and its operating revenues and expenses are not commingled with other County finances. The Airports Division reimburses the County for expenditures at the airports (such as maintenance work), providing a source of revenue for other public services.

Taxes associated with aircraft and aviation are collected by the County and distributed to the County General Fund and the School District. **In Fiscal Year 2015-2016, the Contra Costa County Airports Division provided \$2.7 million dollars to the County’s General Fund and \$1.2 million to the schools.** Compared to five years ago (FY 2011-2012), the Contra Costa County Airports Division contribution to the County is up 37 percent and contribution to the schools is up 27 percent. FY 2015-16 Airports Revenue Distribution is shown in **Exhibit 1**.

Exhibit 1: Airports Revenue Distribution



Other: All other affected taxing entities (such as mosquito abatement, fire, Bay Area Rapid Transit [BART], service area districts, and various youth-serving organizations and businesses).



3.2 Byron Airport (C83)

The area surrounding C83 is less developed than CCR and the Airport is located in a more sparsely populated part of the County. The area has growth potential and the Airports Division is actively promoting development of facilities and infrastructure at C83. There is one independent business located at C83, and the Airports Division (which counts as the second business for the EIA) provides operations staff, maintenance services, and fuel sales. The area does see GA visitors although not at the same level as CCR. As a non-towered airport, less information is known about the true number of operations at C83 so the EIA relies more heavily on assumptions based on the limited available data than it does for CCR, which has more detailed records.

3.2.1 C83 Aviation-Dependent Business

Aviation-related businesses at C83 support 10 jobs and contribute \$630,012 to the annual regional economic output. These businesses purchase goods and services from other businesses in the County, and proprietors and employees spend their wages and pay taxes, triggering indirect impacts. The businesses and taxing authorities indirectly impacted in turn purchase goods and materials, and their proprietors and employees spend their wages and pay taxes, which triggers induced impacts. Expenditures associated with general maintenance and repair are included here, and not in **Section 3.2.2**. A summary of economic impact by aviation-related businesses is included in **Table 15**.

Table 15: Economic Impact of Aviation-Dependent Businesses at C83				
Impact Type	Employment (Total Jobs)	Labor Income	Value Added	Output
Direct	8	\$212,619	\$213,044	\$368,826
Indirect	1	\$45,156	\$75,044	\$122,188
Induced	1	\$47,326	\$87,026	\$138,998
Total Impact	10	\$305,101	\$375,114	\$630,012

*Note: Money in 2016 values. Output includes income and value added; do not add categories in the same row together.
Source: Mead & Hunt, 2016; IMPLAN, 2016.*

Due to the low number of jobs (compared to CCR), aviation-related businesses at C83 do not support as wide an array of other industries. Most impacts are contained to the Airport businesses themselves, with some spill-over effects for local retail, food and beverage, and real estate businesses. Aviation-related businesses make up 45 percent of jobs and 30 percent of economic output associated with C83.

3.2.2 C83 Construction Expenditures

Construction expenditures include engineering and architectural design, construction administration and labor, and expenditure on construction materials. They do not include general maintenance and repair, which is included in **Section 3.2.1**. Similar to CCR, airport construction activities are highly variable depending on the work that needs to be done. For this reason, construction impacts are typically calculated on a project-specific basis. To provide a sense of how much an “average” construction season impacts the local economy, construction impacts are calculated using the average expenditure from 2013 to 2015. The results are shown in **Table 16**.

Impact Type	Employment (Total Jobs)	Labor Income	Value Added	Output
Direct	4	\$320,876	\$393,663	\$745,252
Indirect	1	\$73,709	\$115,227	\$198,213
Induced	2	\$72,775	\$133,843	\$213,757
Total Impact	7	\$467,360	\$642,733	\$1,157,222

*Note: Money in 2016 values. Output includes income and value added; do not add categories in the same row together.
Source: Mead & Hunt, 2016; IMPLAN, 2016.*

Construction expenditures primarily support construction and architectural engineering industries. Indirect and induced impacts support retail and restaurant industries. Construction impact is highly sensitive to the amount of materials purchased in the study area and the use of labor that lives in the study area. This will vary from project to project, which is another reason why construction impacts are typically assessed on a project by project basis.

Construction activities make up 32 percent of employment and 55 percent of economic output generated by C83. The reason that these numbers are much higher than the construction impacts at CCR is because the overall economic impact by non-construction activities is smaller at C83, and construction projects are some of the largest capital expenditures in the area.

3.2.3 C83 GA Visitor Spending

Due to the limited level of data available, GA visitor spending at C83 is calculated based on FAA flight records with adjustments made for operators based at C83 and those visiting from other airports. C83 is not located near major business and employment centers and while the Airport does cater to GA visitors, these users are assumed to spend less time and money in the area than those at CCR. Estimates of GA visitor impact for C83 are shown in **Table 17**.

Impact Type	Employment (Total Jobs)	Labor Income	Value Added	Output
Direct	3	\$100,354	\$111,411	\$201,015
Indirect	1	\$18,468	\$31,508	\$50,650
Induced	1	\$21,993	\$40,545	\$64,603
Total Impact	5	\$140,818	\$183,372	\$316,268

*Note: Money in 2016 values. Output includes income and value added; do not add categories in the same row together.
Source: Mead & Hunt, 2016; IMPLAN, 2016.*

GA visitors supported 23 percent of employment and 15 percent of economic output generated by C83.



3.2.4 C83 Airport Economic Impact

The economic impact of C83 is the combination of the economic impacts of aviation-related businesses, construction expenditures, and GA visitor spending. Profiles of these three activities are described in **Section 3.2.1** through **Section 3.1.3**. Airport economic impact includes direct, indirect, and induced jobs, and shows how the Airport supports activities well beyond its property. A summary of airport economic impact is presented in **Table 18** and **Table 19**.

Impact Type	Employment (Total Jobs)	Labor Income	Value Added	Output
Direct	15	\$633,852	\$718,117	\$1,315,092
Indirect	3	\$137,333	\$221,779	\$371,052
Induced	4	\$142,094	\$261,323	\$417,358
Total Impact	22	\$913,279	\$1,201,219	\$2,103,502

*Note: Money in 2016 values. Output includes income and value added; do not add categories in the same row together.
Source: Mead & Hunt, 2016; IMPLAN, 2016.*

Impact Type	Employment (Total Jobs)	Labor Income	Value Added	Output
Aviation Businesses	10	\$305,101	\$375,114	\$630,012
Construction	7	\$467,360	\$642,733	\$1,157,222
GA Visitors	5	\$140,818	\$183,372	\$316,268
Total	22	\$913,279	\$1,201,219	\$2,103,502

*Note: Money in 2016 values. Output includes income and value added; do not add categories in the same row together.
Source: Mead & Hunt, 2016; IMPLAN, 2016.*

C83 supports 22 jobs and contributes \$2.1 million in annual economic output in Contra Costa County directly through aviation-related businesses, construction activities, and GA visitors, and indirectly and induced through expenditures of these industries. The industries with the greatest benefit from C83 are shown in **Table 20**.

Rank	Employment	Jobs	Economic Output	Dollars
1	Other Education Services	7	Construction of Other Nonresidential Structures	\$602,766
2	Full-Service Restaurants	4	Other Education Services	\$286,317
3	Construction of Other Nonresidential Structures	3	Full-Service Restaurants	\$193,891
4	Architectural/Engineering Services	1	Architectural/Engineering Services	\$166,576
5	Scenic and Sight Seeing Transportation and Support Activities for Transportation	1	Scenic and Sight Seeing Transportation and Support Activities for Transportation	\$93,891

*Note: Money in 2016 values. Output includes income and value added.
Source: IMPLAN, 2016.*

“Other educational services” includes the on-airport business, and “Scenic and Sight Seeing Transportation and Support Activities for Transportation” includes the Airports Division Staff that work at C83.



3.2.5 C83 Airport Tax Impact

Similar to CCR, money invested in C83 comes back to the region in many ways. Taxes on goods, businesses, and employees by local, state, and federal entities is reinvested in the County in a number of ways. Tax generation associated with C83 is shown in **Table 21**.

Jurisdiction	Employee Compensation	Proprietor Income	Production and Imports	Households	Corporations
State/Local	\$1,870	\$0	\$55,659	\$36,261	\$2,955
Federal	\$86,694	\$7,715	\$6,414	\$82,631	\$16,895

*Note: Money in 2016 values.
Source: IMPLAN, 2016.*

The Airport and associated economic activity provide \$96,000 in state and local tax revenue and \$200,000 in federal tax revenue. Some of this money is reinvested in the community through programs ranging from health care, emergency services, and education to economic development, although this governmental reinvestment is too far removed from aviation activities to be included with the Airport's economic impact which is the reason why the focus should be given to development which positively impacts the County.

4. Summary

The EIA for Contra Costa County Airports Division considers the economic impact of aviation-related and non-aviation-related businesses on airport property, construction activities, and GA visitors in the County that are located near CCR and C83. Data gathered as part of this effort comes from business owners and managers, the Airport, federal databases, and third party data providers. The result of this EIA shows how CCR and C83 contribute to and support local economic activity through a great number of related economic activities and transactions.

The Airports Division supports 828 jobs and \$105.93 million in economic output. Included in these numbers are employee wages, proprietor income, business sales, and value added. Also included are state, local, and federal taxes on income and property that go to support other government programs. The Airports support a diverse range of industries that are vital to the health of the local economy, and also attract visitors who bring outside money into the region. **Table 22** summarizes this information.

Impact Type	Employment (Total Jobs)	Labor Income	Value Added	Output
Direct	563	\$29,034,772	\$38,587,859	\$65,719,837
Indirect	131	\$8,017,966	\$12,400,809	\$20,123,588
Induced	134	\$6,841,654	\$12,583,273	\$20,095,909
Total Impact	828	\$43,894,393	\$63,571,940	\$105,939,333

*Note: Money in 2016 values. Output includes income and value added; do not add categories in the same row together.
Source: Mead & Hunt, 2016; IMPLAN, 2016.*

Exhibit 2: Airport Locations

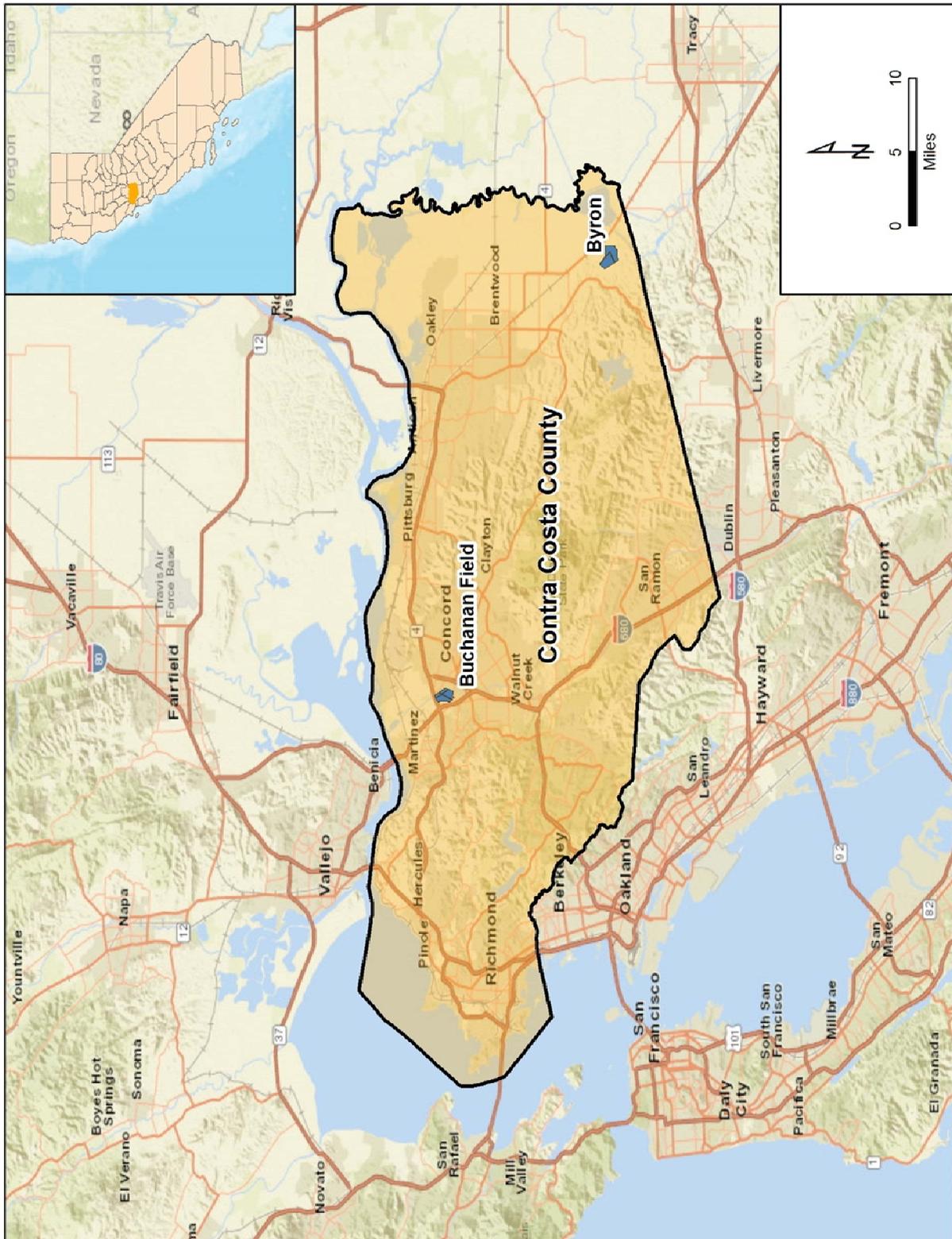


Exhibit 3: Top Industries in Contra Costa County						
#	By Employment	Jobs	By Labor Income	Billions	By Economic Output	Billions
1	Real estate	33,548	Local govt, education	1.95	Petroleum refineries	44.98
2	Local govt, education	24,524	Local govt, non-education	1.46	Real estate	7.22
3	Full-service restaurants	14,122	Management of companies and enterprises	1.44	Owner-occupied dwellings	5.63
4	Individual and family services	13,888	Petroleum refineries	1.44	Natural gas distribution	5.04
5	Limited-service restaurants	13,590	Wholesale trade	1.11	Wireless telecommunications	3.84
6	Wholesale trade	13,311	Natural gas distribution	1.08	Wholesale trade	3.49
7	Local govt, non-education	13,274	Hospitals	1.07	Management of companies	2.46
8	Other financial investment activities	11,238	Outpatient care centers	1.01	Wired telecommunications carriers	2.42
9	Services to buildings	10,198	Offices of physicians	0.85	Local govt, education	2.11
10	Retail - Food and beverage stores	10,166	Custom computer programming	0.71	Outpatient care centers	1.99

Source: IMPLAN, 2016 (Income and Output in 2016 Dollars)

Exhibit 4: Top Industries For Aviation Related Businesses Economic Impact at CCR						
#	By Employment	Jobs	By Labor Income	Millions	By Economic Output	Millions
1	Other Educational Services	23	Other ambulatory health care services	2.97	Other ambulatory health care services	4.04
2	Other Ambulatory Health Services	21	Scenic and sightseeing transportation and support activities for transportation	2.59	Wholesale trade	3.69
3	Scenic and Sight Seeing Transportation and Support Activities for Transportation	18	Wholesale trade	1.29	Scenic and sightseeing transportation and support activities for transportation	3.51
4	Insurance Agencies, Brokerages, and Related Activities	13	Insurance agencies, brokerages, and related activities	0.91	Insurance agencies, brokerages, and related activities	2.31
5	Wholesale Trade	8	Other educational services	0.53	Automotive equipment rental	1.07
6	Automotive Equipment and Leasing	5	Automotive equipment rental and leasing	0.21	Real estate	1.06
7	Real Estate	5	Real estate	0.18	Other educational services	0.91
8	Couriers and Messengers	3	Hospitals	0.16	Owner-occupied dwellings	0.84
9	Transit and Ground Transportation	3	Postal service	0.14	Insurance carriers	0.36
10	Full-Service Restaurants	2	Offices of physicians	0.13	Monetary authorities	0.32

Source: IMPLAN, 2016 (Income and Output in 2016 Dollars)

Exhibit 5: Top Industries For Non-aviation Businesses Economic Impact at CCR						
#	By Employment	Jobs	By Labor Income	Millions	By Economic Output	Millions
1	Retail - General merchandise	139	Architectural/Engineering Services	6.77	Architectural/Engineering Services	15.14
2	Architectural/Engineering Services	68	Retail - General merchandise	3.46	Retail - General merchandise	8.88
3	Retail - Sporting goods, hobby, musical instrument and books	44	Construction of other new nonresidential structures	1.42	Construction of other new nonresidential structures	3.59
4	Hotels and motels	35	Retail - Sporting goods, hobby, musical instrument and books	1.38	Retail - Sporting goods, hobby, musical instrument and books	3.56
5	Limited-service restaurants	22	Hotels and motels	1.00	Hotels and motels	3.46
6	Other amusement and recreation industries	21	Other amusement and recreation	0.91	Real estate	3.03
7	Construction of other new nonresidential structures	20	Automotive repair and maintenance	0.73	Wholesale trade	2.55
8	Real estate	13	Employment services	0.73	Other amusement and recreation	2.15
9	Automotive repair	12	Wholesale trade	0.65	Owner-occupied dwellings	1.91
10	Investigation and security services	11	Waste management services	0.55	Waste management services	1.60

Source: IMPLAN, 2016 (Income and Output in 2016 Dollars)

Exhibit 6: Top Industries For GA Visitor Economic Impact at CCR						
#	By Employment	Jobs	By Labor Income	Thousands	By Economic Output	Thousands
1	Full-service restaurants	52	Full-service restaurants	1,368.47	Full-service restaurants	2583.06
2	Hotels and motels	7	Hotels and motels	214.81	Hotels and motels	652.01
3	Motion picture and video industries	1	Management of companies	66.47	Real estate	247.82
4	Real estate	1	Real estate	40.98	Motion picture and video industries	180.35
5	Services to buildings	1	Hospitals	30.64	Owner-occupied dwellings	162.66
6	Independent artists, writers, and performers	1	Offices of physicians	24.69	Management of companies	116.20
7	Limited-service restaurants	1	Wholesale trade	24.62	Wholesale trade	70.57
8	Management of companies	1	Motion picture and video industries	23.50	Insurance carriers	53.13
9	Retail - General merchandise	1	Employment services	18.55	Hospitals	51.60
10	Individual and family services	1	Postal service	18.46	Monetary authorities	50.06

Source: IMPLAN, 2016 (Income and Output in 2016 Dollars)

Exhibit 7: Top Industries For Overall Economic Impact at CCR						
#	By Employment	Jobs	By Labor Income	Millions	By Economic Output	Millions
1	Retail - General merchandise	141	Architectural/Engineering Services	7.39	Architectural/Engineering Services	16.20
2	Architectural/Engineering Services	74	Retail - General merchandise	3.53	Retail - General merchandise	9.05
3	Full-service restaurants	70	Other ambulatory health care	2.99	Construction of other new nonresidential structures	7.21
4	Retail - Sporting goods, hobby, musical instrument and books	44	Construction of other new nonresidential structures	2.84	Wholesale trade	6.47
5	Other educational services	42	Scenic and sightseeing transportation and support activities for transportation	2.69	Real estate	4.57
6	Hotels and motels	41	Wholesale trade	2.02	Hotels and motels	4.12
7	Construction of other new nonresidential structures	40	Full-service restaurants	1.85	Other ambulatory health care	4.08
8	Limited-service restaurants	25	Retail - Sporting goods, hobby, musical instrument and book	1.39	Scenic and sightseeing transportation and support activities for transportation	3.72
9	Other amusement and recreation	22	Hotels and motels	1.22	Retail - Sporting goods, hobby, musical instrument and books	3.59
10	Other ambulatory health care	22	Insurance agencies, brokerages, and related activities	1.09	Full-service restaurants	3.50

Source: IMPLAN, 2016 (Income and Output in 2016 Dollars)

Exhibit 8: Airports Division EIA Business Survey



Contra Costa County
Buchanan Field and Byron Airport

On-Airport Business Survey

Dear Business Owner:

In order to better position Buchanan Field and Byron Airport for tenant attraction and retention, Contra Costa County is seeking information about on-airport businesses at Buchanan Field and Byron Airport as part of a Strategic Plan to establish a collective vision for the Airports Division, County, and other key stakeholders. This information will help shape the future of aviation services at each airport and will assist in determining the value of the airports to the County. We would greatly appreciate you taking the time to complete and return this brief survey to the Survey Administrators.

Please provide the information requested below by **no later than April 18, 2016**. All of the information you provide on this questionnaire will remain confidential however, to be eligible for a prize drawing, please provide your contact information at the end of the survey. Responses to the survey questions are optional and only aggregate summaries of this data will be reported.

Please answer the following questions:

1) What is the name of your business?

2) What industry does your business primarily serve?

3) How many employees do you currently have?

No. of Full-time Employees	No. of Part-time Employees

4) Please report the total 2015 payroll (per your latest annual budget) paid to all employees employed by your business at the airport: \$ _____

5) Please report your total capital expenditures over the last 3 years:

2015	2014	2013
\$ _____	\$ _____	\$ _____

6) How long have you been a tenant or user of general aviation facilities at the airports?

7) Do you rent hangar space or an apron tie-down?

Yes No



**Contra Costa County
Buchanan Field and Byron Airport**

8) If you rent hangar space, what type of hangar do you rent?

9) What type of additional aircraft hangar facilities would best suit your needs?

- | | |
|---|---|
| <input type="checkbox"/> Regular T-Hangar | <input type="checkbox"/> Large T-Hangar |
| <input type="checkbox"/> Executive Hangar (approx. 60'x60') | <input type="checkbox"/> Executive Hangar (approx. 80'x80') |
| <input type="checkbox"/> Corporate Hangar (approx. 100'x100') | <input type="checkbox"/> Other _____ |

10) What general aviation services or infrastructure do you feel needs improvement or would help grow your business?

- | | |
|---|--|
| <input type="checkbox"/> Fixed Base Operator Services | <input type="checkbox"/> Apron Tie-Downs |
| <input type="checkbox"/> Fuel Sales and Service | <input type="checkbox"/> Apron Parking |
| <input type="checkbox"/> Aircraft Maintenance Services | <input type="checkbox"/> Vehicle Access and Parking |
| <input type="checkbox"/> Avionics Repair Services | <input type="checkbox"/> Access to Wireless Networks |
| <input type="checkbox"/> Flight Planning/Weather | <input type="checkbox"/> Signage |
| <input type="checkbox"/> Aircraft Rental | <input type="checkbox"/> Food/Refreshments |
| <input type="checkbox"/> Counter Sales | <input type="checkbox"/> Concessions |
| <input type="checkbox"/> Flight Instruction | <input type="checkbox"/> Security/Access Control |
| <input type="checkbox"/> Ground Transportation Services | <input type="checkbox"/> Approach/Navigational Aids |
| <input type="checkbox"/> Additional Runway Length | <input type="checkbox"/> Other _____ |

11) Why did you select this airport as a home for your business?

12) Where do you see your business growth occurring particularly in relation to Contra Costa Airports over the next 5, 10 and 20 years?

13) If there is anything else that you would like to add which you feel may be useful to the study, such as recommendations for improving service or airport facilities, please provide your comments below:



**Contra Costa County
Buchanan Field and Byron Airport**

- 14) All of the information you provided on this questionnaire will remain confidential however, to be eligible for a prize drawing, please provide your contact information below:

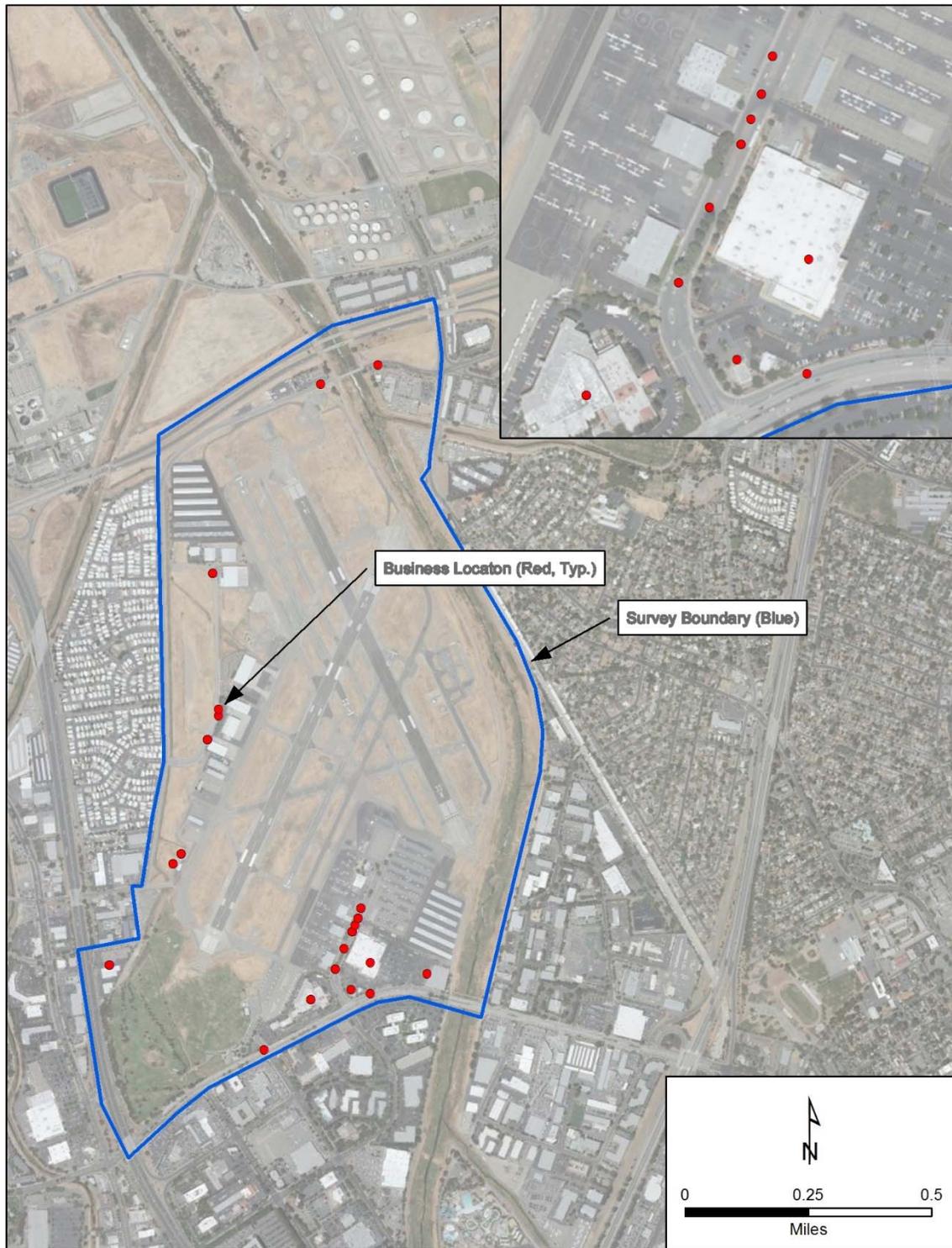
Name: _____
Company: _____
Address: _____
Address 2: _____
City/Town: _____
State/Province: _____
Zip/Postal Code: _____
Country: _____
Email Address: _____
Phone Number: _____

Please provide your response by 4/18/2016 and return to:

Attention: Beth Lee
Contra Costa County Airports Division
550 Sally Ride Drive
Concord, CA 94520
(925) 646-5722 | Fax: (925) 646-5731
Beth.Lee@airport.cccounty.us

Thank you for your participation in this important study!

Exhibit 9: ESRI Business Analyst Businesses for CCR



Source: ESRI Business Analyst, 2015