

**Airports Economic Impacts Study
for
Monterey, San Benito and Santa Cruz Counties**

August 13, 2003

Prepared by the Association of Monterey Bay Area Governments and funded, in part, by the
Federal Aviation Administration

Executive Summary

The Association of Monterey Bay Area Governments (AMBAG) received grant funding from the Federal Aviation Administration to complete an economic analysis of the regional importance of the six public airports serving the AMBAG region (Monterey, San Benito and Santa Cruz Counties). Of the region's airports, the Monterey Peninsula Airport is the only scheduled air carrier airport in the region while all six airports serve general aviation purposes. These airports are:

Hollister Municipal Airport: Located in the northern end of the city of Hollister and operated by the City for general aviation.

Marina Municipal Airport: After the closure of Fort Ord, the City of Marina was conveyed Fritzsche Army Airfield in 1995. The City reopened the airport as a municipal general aviation airport.

Mesa Del Rey (King City) Airport: Located in south Monterey County, this airport is operated by the City of King for general aviation.

Monterey Peninsula Airport: The Monterey Peninsula Airport District operates this facility on the Monterey Peninsula. The District is composed of the Cities of Carmel-by-the-Sea, Monterey, Pacific Grove, Seaside, Sand City, Del Rey Oaks and portions of the Monterey County unincorporated area. This airport supports general aviation and commercial, air carrier traffic.

Salinas Municipal Airport: The City of Salinas operates this general aviation airport located within their sphere of influence in Monterey County.

Watsonville Municipal Airport: Located in southern Santa Cruz County and operated by the City of Watsonville for general aviation.

The Airports Economic Study was designed to evaluate the economic impacts of each airport on the local vicinity served by the airport and to prepare a regional picture of the combined airports importance to the three-county economy. Data analysis was designed to show the "value added" contribution of each airport to their local economies and the entire three-county AMBAG region. Utilizing the services of staff, survey collectors and a consultant economist, data were collected, analyzed and reviewed for relevancy and importance to the regional economy. The collected data were analyzed with the California Airport Economic Impact Model developed by Caltrans, an affordable, statewide model used to assess parameters required of the study. Results in this report are a function of that analysis tailored to meet the specific needs of the region and the review process.

Each airport has facilities to accommodate future on-site growth and in all cases currently provides a positive economic impact to the areas they serve. The potential for increased value lays in future forecasts that indicate continual growth in population and service needs. Each passenger traveling to the region spends over an average of \$280 a day and requires additional

servicing through the secondary and tertiary levels of the economy. The total direct, indirect and induced economic benefit of the six regional airports was estimated to be \$1.38 billion annually; this value added benefit is expected to expand to even greater levels in the future.

As this study reinforces, AMBAG region airports play an important economic role in the total regional economy. The airports service the needs of agriculture, tourism, government and other business interests throughout the region. Almost 50 percent of the total air trips to the area through the regional airports are specifically for business purposes while another 40 percent of those trips are for tourism. Without the region's airports, the potential loss of these patrons could mean a large loss to the region's overall economic productivity.

This report utilizes survey information collected during the spring of 2002. Figures presented are believed to be a conservative estimate of the local economic impact of airports. From 23 to 72 percent of the survey forms were returned in each of the categories surveyed. This represents an acceptable return rate on which information was based to provide the results in the report.

The AES Report is divided into the following chapters:

1. Study Setting
2. Study Methodology and Impacts Definition
3. Surveys Summary
4. Regional Airports Summary
5. Comparison of the 1991 and 2003 Economic Impact Studies
6. Individual Airport Summaries

Collectively, the individual airport summaries form the basis for the conclusions drawn in this report. Those conclusions represent the general value added impacts of the AMBAG Region's six airports.

Information provided in this report will be used as a statistical "snapshot" of the value added importance of local airports in the AMBAG region. Information may be used by individual airports as part of a marketing tool to demonstrate what value added economic benefit the airports have locally and as part of the larger picture for the AMBAG region.

TABLE OF CONTENTS

	<u>Page</u>
Executive Summary	i
Table of Contents	iii
1. Study Setting	1
Airport Characteristics	1
General Demographics	1
2. Study Methodology and Impacts Definition	6
California Airports Economic Impact Model	6
Direct Impact	6
Indirect Impact	7
Induced Impact	7
3. Surveys Summary	8
Local Business Survey	8
Airport Tenant Survey	8
Visitor Travel Survey	9
4. Regional Airports Summary	13
Airport Operations and Based Aircraft	13
Jobs and Payroll	13
State and Local Taxes	13
Locally Generated Spending	13
Overall Economic Benefit	15
Summary Analysis	15
5. Comparison of the 1991 and 2003 Economic Impact Studies	16
6. Individual Airport Summaries	18
A. Monterey Peninsula Airport	18
Aircraft Operations	18
Jobs and Payroll	18
State and Local Taxes	20
Locally Generated Spending	20
Overall Economic Benefit	20
Summary Analysis	20

B.	Salinas Municipal Airport	21
	Aircraft Operations	21
	Jobs and Payroll	21
	State and Local Taxes	21
	Locally Generated Spending	22
	Overall Economic Benefit	22
	Summary Analysis	22
C.	Hollister Municipal Airport	25
	Aircraft Operations	25
	Jobs and Payroll	25
	State and Local Taxes	25
	Locally Generated Spending	25
	Overall Economic Benefit	26
	Summary Analysis	26
D.	Watsonville Municipal Airport	28
	Aircraft Operations	28
	Jobs and Payroll	28
	State and Local Taxes	28
	Locally Generated Spending	28
	Overall Economic Benefit	29
	Summary Analysis	29
E.	Marina Municipal Airport	32
	Aircraft Operations	32
	Jobs and Payroll	32
	State and Local Taxes	32
	Locally Generated Spending	32
	Overall Economic Benefit	33
	Summary Analysis	33
F.	Mesa Del Rey Airport	35
	Aircraft Operations	35
	Jobs and Payroll	35
	State and Local Taxes	35
	Locally Generated Spending	35
	Overall Economic Benefit	36
	Summary Analysis	36

LIST OF FIGURES

1.	AMBAG Regional Airports Map	2
2.	Regional Employment Changes 1990 to 2000	5
3.	Percent Impact by Source (Monterey Peninsula Airport)	19
4.	Percent Impact by Source (Salinas Municipal Airport)	24
5.	Percent Impact by Source (Hollister Municipal Airport)	27
6.	Percent Impact by Source (Watsonville Municipal Airport)	31
7.	Percent Impact by Source (Marina Municipal Airport)	34
8.	Percent Impact by Source (Mesa Del Rey Airport)	37

LIST OF TABLES

1.	Regional Airports Operational Characteristics	3
2.	AMBAG Region Population	4
3.	Employment Changes 1990 to 2000	5
4.	Survey Statistics	10
5.	Airport Tenant Impacts	11
6.	Visitor Trip Purpose & Resulting Expenditures	12
7.	AMBAG Region Airports Economic Impact	14
8.	Comparison of the 1991 and 2003 Study Results	17
9.	Annual Percent Change	17
10.	Monterey Peninsula Airport Economic Impacts	19
11.	Salinas Municipal Airport Economic Impacts	24
12.	Hollister Municipal Airport Economic Impacts	27
13.	Watsonville Municipal Airport Economic Impacts	31
14.	Marina Municipal Airport Economic Impacts	34
15.	Mesa Del Rey Airport Economic Impacts	37

APPENDIX

Survey Form Examples

1.	Visitor Survey	A-1
2.	Airport Tenant Survey	A-3
3.	Local Business Survey	A-4

Chapter 1 – Study Setting

The AMBAG region includes Santa Cruz, San Benito and Monterey Counties located in northern California adjacent to the Pacific Ocean (Figure 1). The area includes mountainous terrain and long valleys. The four major urban centers in the region are located in the City of Santa Cruz to Watsonville corridor along the coastline in Santa Cruz County, along the coast from Marina to Carmel By-The-Sea in Monterey County, at the City of Salinas in the inland valley, and the City of Hollister in north-central San Benito County. The three-county region enjoys a moderate climate during most of the year, making the region conducive to year-round general aviation activities.

Airports Characteristics

The region's six publicly owned airports have operational characteristics that make them attractive to varied aviation uses (Table 1.) The Monterey Peninsula Airport has the longest runway and can accommodate any commercial aircraft. The Salinas Municipal Airport has the most runways, with three total. The Salinas, Hollister and Watsonville airports do not currently support scheduled air carrier operations but have the capability, runway lengths, ground access and/or instrument approaches that could accommodate future commercial air carrier activities, such as commuter flight services. (Although no such additional commercial air carrier activities are being considered at this time.)

The closest airports to the AMBAG region are located in Santa Clara County. In Santa Clara County, general aviation airports include San Jose International, operated by the City of San Jose, and South County and Reid-Hillview Airports operated by the County of Santa Clara. San Jose International also hosts commercial air carrier operations. These airports are important to the economic discussion for the AMBAG region since their saturated or near saturated capacity could represent potential economic benefit to the AMBAG region airports if aircraft or aircraft services were encouraged to relocate here. Commercial service at San Jose International attracts a significant number of the flying public that would potentially use Monterey Peninsula Airport if fares were otherwise comparable.

General Demographics

Based on the 2000 U.S. Census figures, the AMBAG region has a total population of 710,598, an increase of 14 percent since 1990. Population change by jurisdiction is shown in Table 2, including a 79% increase in residents of the City of Hollister from 1990 to 2000. Employment in the AMBAG region in 2000 totaled 394,960 jobs; the number of jobs in the region increased 15 percent since 1990. Figure 2 shows the increases from 1990 to 2000 by job sector. In 2000, the region's leading employment sectors were Services (29%), Retail Trade (16%), and all levels of Government (14%). Employment within each county by job type for 1990 and 2000 is listed in Table 3.

Publicly Owned Airports in the AMBAG Region



TABLE 1 - REGIONAL AIRPORTS OPERATIONAL CHARACTERISTICS

Characteristic	Hollister	Marina	Mesa Del Rey	Monterey Peninsula	Salinas	Watsonville
Number of Runways	2	1	1	2	3	2
Longest Runway Length (ft.)	6350	3000	4485	7600	6000	4500
Control Tower	No	No	No	Yes	Yes	No
Instrument Landing Capability	No	No	No	Yes	Yes	Yes
Scheduled Commercial Passenger Service	No	No	No	Yes	No	No
Annual Operations	55000	20000	12200	102032	89197	90000
Transient Operations	31350	8000	4880	86730	47275	36000
% Transient Operations	57%	40%	40%	85%	53%	40%
Based Aircraft	145	65	30	169	230	331

TABLE 2 - AMBAG REGION POPULATION

Jurisdiction	1990	2000	Percent
Carmel	4,239	4,081	-3.7
Del Rey Oaks	1,661	1,650	-0.7
Gonzales	4,660	7,525	61.5
Greenfield	7,464	12,583	68.6
King City	7,634	11,094	45.3
Marina	26,436	19,163	-27.5
Monterey	31,954	29,674	-7.1
Pacific Grove	16,117	15,522	-3.7
Salinas	108,777	143,776	32.2
Sand City	192	261	35.9
Seaside	38,901	33,097	-14.9
Soledad	7,146	11,263	57.6
Unincorporated	94,254	100,252	6.4
Monterey County Subtotal	349,437	390,391	11.7
Soledad Prisons*	6,223	11,371	82.7
Monterey County Total	355,660	401,762	13
Hollister	19,212	34,413	79.1
San Juan Bautista	1,571	1,549	-1.4
Unincorporated	15,914	17,272	8.5
San Benito County Total	36,697	53,234	45.1
Capitola	10,171	10,033	-1.4
Santa Cruz	49,040	54,593	11.3
Scotts Valley	8,615	11,385	32.2
Watsonville	31,099	44,265	42.3
Unincorporated	130,809	135,326	3.5
Santa Cruz County Total	229,734	255,602	11.3
Regional Total	622,091	710,598	14.2

* Soledad Prisons are within the City of Soledad

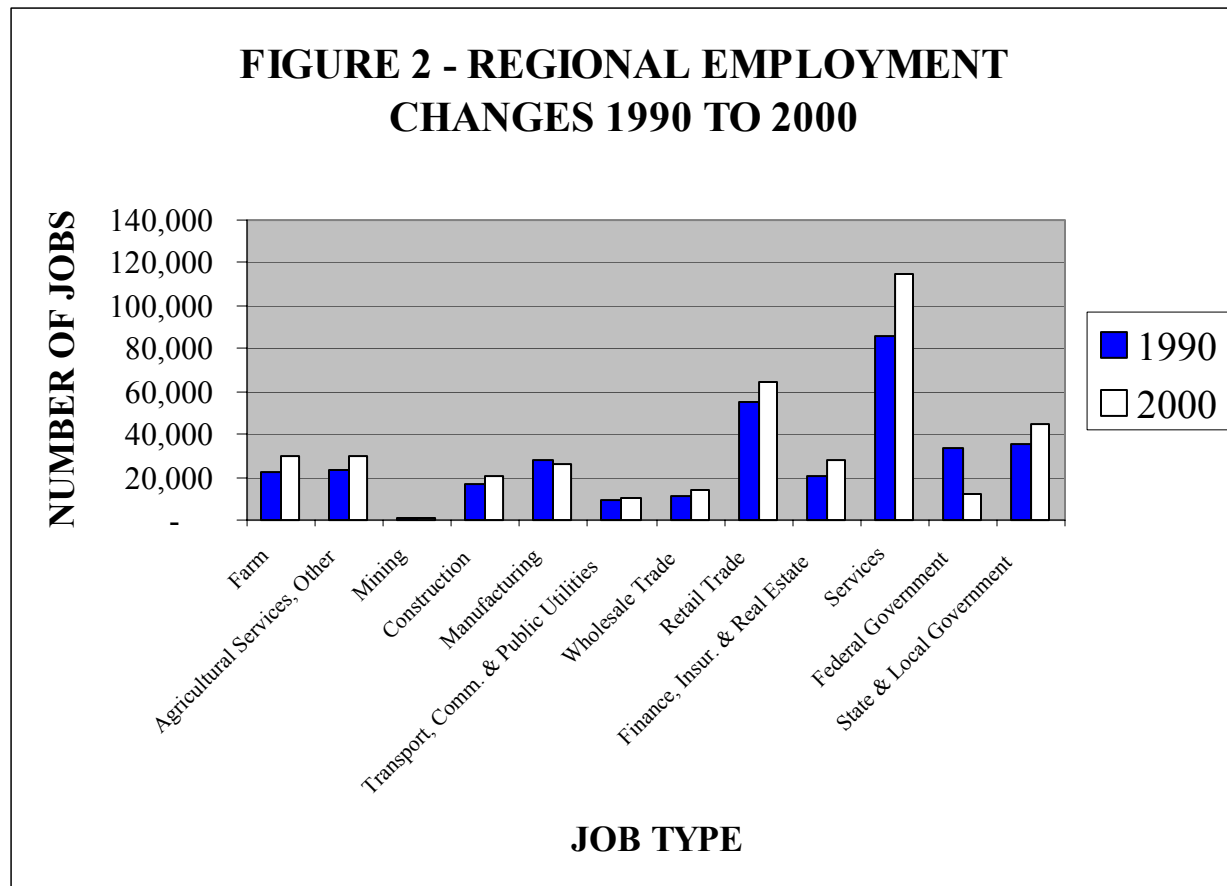


TABLE 3 - EMPLOYMENT CHANGES 1990 TO 2000

TYPE	1990				2000			
	Monterey	San Benito	Santa Cruz	Region	Monterey	San Benito	Santa Cruz	Region
Farm	11,500	1,950	8,630	22,080	18,710	2,080	8,950	29,740
Agricultural Services, Other	19,970	1,610	2,200	23,780	26,200	1,100	2,990	30,290
Mining	410	170	160	740	280	180	130	590
Construction	7,590	980	8,050	16,620	9,970	1,710	8,880	20,560
Manufacturing	10,860	1,960	15,100	27,920	11,060	2,630	11,980	25,670
Transport, Comm. & Public Utilities	5,840	360	3,400	9,600	6,180	470	3,810	10,460
Wholesale Trade	6,490	680	4,210	11,380	6,770	1,380	5,710	13,860
Retail Trade	30,870	2,200	22,250	55,320	34,660	3,470	26,460	64,590
Finance, Insur. & Real Estate	11,740	980	7,940	20,660	15,000	1,360	11,250	27,610
Services	46,820	2,510	36,910	86,240	60,030	4,290	50,900	115,220
Federal Government	32,470	220	1,230	33,920	10,440	260	1,150	11,850
State & Local Government	17,830	2,000	15,960	35,790	24,460	2,640	17,420	44,520
Total Employment	202,390	15,620.00	126,040	344,050	223,760	21,570	149,630	394,960

Chapter 2 – Study Methodology and Impact Definitions

The Airports Economic Study was designed to evaluate the economic impacts of each airport on the local vicinity served by the airport and to prepare a regional picture of the combined airports importance to the three-county economy. Data analysis was designed to show the "value added" contribution of each airport to their local economies and the entire three-county AMBAG region. Utilizing the services of staff, survey collectors and a consultant economist, data were collected, analyzed and reviewed for relevancy and importance to the regional economy. The collected data were analyzed with the California Airport Economic Impact Model developed by Caltrans, an affordable, statewide model used to assess parameters required of the study. Results in this report are a function of that analysis tailored to meet the specific needs of the region and the review process.

California Airport Economic Impact Model

The California Airport Economic Impact Model was developed for the California Department of Transportation, Division of Aeronautics, to assist local medium- and small- size airports to assess economic parameters useful in defining the airport's contribution to the total economy. The model measures net economic impact by considering only the net amount of dollars that remain in the local economy, which means the model only considers those economic activities that would not have taken place without the availability of the local airport. This model package was tailored to the AMBAG region to more closely represent local conditions. A prior version of this model was used in 1991 to look at regional impacts of Monterey Peninsula, Mesa Del Rey, Salinas, and Watsonville airports.

Once data were collected, a data technician entered this information into the California Airport Economic Impact Model. The model reports impacts in three categories: 1) Direct Impact, 2) Indirect Impact and 3) Induced Impact. Impacts within these three categories are subsequently reported as direct, indirect and induced values derived from estimates calculated by the model. The sum of the three categories comprises the total economic impact of the airports studied. The induced economic impact category looked at the gross revenues and jobs lost should the airport(s) cease to exist. The induced impacts are therefore reported as a separate figure from the direct and indirect economic impacts to avoid the risk of "double-counting" information that may, in part, be partially overlapping in its effect. The study's consulting economist made minor modifications to the model to reduce the risk of "double-counting" information, this allowed for the three impact types to be combined to provide an estimate of total potential impact.

A more detailed description of each type of impact follows.

Direct Impact

The direct impact results from spending in the local area by visitors who arrive by air, and spending in the local area for goods and services by airport tenants (airport administration, fixed base operators, airlines, airport concessions, and a variety of non-aviation related businesses located on airport property). Only visitors who indicated that they would not have visited the area without the availability of the airport are taken into account.

Indirect Impact

Indirect impact is defined as the perception that the business community has on the airport's impact on local business operations. Only data from businesses that responded they would lose revenue, layoff workers, or relocate out of the area if the airport were closed was included in the calculation of the indirect impact for the airports. Local businesses that indicated tourism as their business type were excluded from the indirect impact calculations. The airports' impacts on tourism-based businesses are accounted for in the direct impact category.

Induced Impact

The induced impact consists of the multiplier effect that results from the re-spending of the direct impact. For example, a general aviation pilot or a passenger spends \$100 to stay at a local hotel. The hotel owner uses part of the \$100 to pay an employee. The employee in turn uses part of the money to buy groceries in a local store and part of the money to buy something that is not locally produced. The storeowner uses part of the money received from the original employee to buy locally produced supplies and part of the money to buy non-locally produced supplies. Each transaction results in money leaving the local economy. This occurrence is referred to as leakage. With each transaction, the portion of money that remains in the local economy becomes smaller and smaller until it is zero, which completes the cycle. To calculate induced impact, the U.S. Department of Commerce has developed (and continuously updates) a set of multiplier coefficients for over 500 industries. In this study, multiplier coefficients are used for the following industries: 1) hotel and lodging, 2) retail sales, 3) construction, 4) business services, and 5) household sector.

Chapter 3 – Surveys Summary

To determine the three-fold economic impacts of the airports (direct, indirect and induced), a series of surveys were used. Surveys were designed to take a statistically acceptable sample, both in numbers of surveys used and the randomness in which they were taken or distributed. Information collected and analyzed from those surveys was designed to show an estimate of the value added economic benefit illustrated. Surveys were taken by both a survey team and through a mail-out to randomly selected local businesses thought to have a causal relationship to airport use. Sample survey forms for each sample type are shown in the Appendix. Table 4 summarizes the types of surveys used, the number distributed and collected, and the rate of return for each. Each survey type is briefly described in the following sections.

Local Business Survey

Businesses not located directly on airport property were included in this survey. Local business surveys were mailed to a random list of those businesses that may have an airport connection. All surveys in this category were distributed by mail based on a mailing list prepared using InfoUSA, Inc., local chambers of commerce data, and county tax assessor data. Businesses targeted included: all large employers in the community served by each airport; all businesses within one mile of each airport; businesses whom have airplanes based at one of the Study's airports; and a random sample of the remaining business in the area served by each airport. A total of 1,086 surveys were mailed and 263 returned. A return rate of 20 percent or greater for statistical validity was targeted; the overall return rate achieved was 24 percent. Of the 263 businesses responding to the survey, the total annual business revenue generated was \$3.27 billion. These businesses employed over 22,860 people in the AMBAG region.

Airport Tenant Survey

Airport Tenant Surveys were conducted at each of the six publicly owned airports in the region. These surveys were mailed to each airport tenant. Table 4 indicates that a total of 137 airport businesses were included in the survey. Of those, 56 responded for a 41 percent response rate. Airport tenant surveys were initially mailed to all tenant businesses. Follow-up efforts to encourage additional participation included phone contacts and on-site survey collection by staff. Tenants who did not initially return a completed survey received a follow up visit or phone call to encourage their participation. All on-airport businesses, including the airport administrative offices for the local jurisdiction, were included. The direct and induced economic impacts for both aviation and non-aviation airport tenants are listed on Table 5. The Airport Tenants Survey primarily determined spending for payroll and goods and services reflecting operations for the calendar year 2001. All data collected were for an annualized basis.

A goal of 100 percent survey return of airport tenants was established for this study. While visitor and local business surveys are treated as samples representing all visitors using the airport and all local businesses in the community, lacking data for any airport tenant(s) would reduce the economic impact calculated for the airport. The return rate for the Airport Tenant Survey averaged 41% for all airports. Data for tenants who didn't complete a survey were estimated so each airport's economic impact would not be underreported. The names of businesses located at the airports were supplied by the airport administrations. Numbers of employees for each business, when unknown, were identified using employment data from InfoUSA, Inc. Payroll

estimates were made using the California Employment Development Department's 2000 Occupational Employment Statistics (OES) survey.

Visitor Travel Survey

Both commercial and general aviation passengers were surveyed with this form. Visiting general aviation pilots and passengers at the Hollister, Monterey Peninsula, Salinas and Watsonville airports were interviewed by a team of survey personnel under the supervision of AMBAG staff. Additional survey forms were left with airport administrators and some fixed base operators at all six of the airports to be distributed when survey personnel were not in attendance. Information collected from the visitor survey recorded the passengers' reasons for using the airport. Collected data included: reason for the trip (business, tourism, conference, or other); length of visit; whether the trip would have been made if the airport did not exist; expenses for the trip; and type of plane used (private, rental, commercial, or company).

A total of 515 general aviation surveys (a minimum of 100 surveys per site) from airports in Watsonville, Hollister, Monterey Peninsula and Salinas were administered to visiting passengers and pilots over a two-month period in March and April 2002. At the region's only commercial airport, Monterey Peninsula Airport, survey personnel interviewed an additional 141 departing passengers who were not from the AMBAG region. All data collected were for the period of the visit and were expanded to provide an annual figure for the impact of visitor spending. Visitor trip purpose and resulting expenditures are shown in Table 6.

TABLE 4 - SURVEY STATISTICS

	Monterey Peninsula	Salinas	Hollister	Watsonville	Marina	King City	Regional Total
Local Business Surveys Mailed	297	232	183	251	40	83	1086
Local Business Surveys Returned	67	57	46	53	22	18	263
% Local Business Surveys Returned	23%	25%	25%	21%	55%	22%	24%
Airport Tenants	44	18	19	31	22	3	137
Airport Tenant Surveys Returned	14	13	5	14	9	1	56
% Airport Tenant Surveys Returned	32%	72%	26%	45%	41%	33%	41%
Visitor Surveys Collected*	263	120	112	140	2	19	656

* 141 of the visitor surveys collected at Monterey Peninsula Airport were from commercial airline passengers

TABLE 5 - AIRPORT TENANTS IMPACTS

Impact Type	Monterey Peninsula	Salinas	Hollister	Watsonville	Marina	King City	Regional Total
A. Direct Impacts							
AVIATION TENANTS							
Number of Jobs	183	157	46	37	44	9	476
Payroll	\$ 5,679,448	\$ 4,121,349	\$ 1,306,681	\$ 718,043	\$ 1,186,859	\$ 339,404	\$ 13,351,784
Taxes	\$ 170,138	\$ 213,134	\$ 52,198	\$ 128,206	\$ 44,683	\$ 8,615	\$ 616,974
Revenues	\$ 9,430,735	\$ 6,356,579	\$ 1,420,584	\$ 2,562,418	\$ 1,951,006	\$ 131,192	\$ 21,852,514
Total Aviation Tenant Economic Impacts	\$ 15,280,321	\$ 10,691,062	\$ 2,779,463	\$ 3,408,667	\$ 3,182,548	\$ 479,211	\$ 35,821,272
NON-AVIATION TENANTS							
Number of Jobs	213	0	24	163	88	0	488
Payroll	\$ 4,840,644	\$ -	\$ 562,187	\$ 5,636,270	\$ 1,063,845	\$ -	\$ 12,102,946
Taxes	\$ 100,130	\$ -	\$ 65,020	\$ 38,625	\$ 21,909	\$ -	\$ 225,684
Revenues	\$ 1,968,699	\$ -	\$ 308,450	\$ 3,164,566	\$ 495,851	\$ -	\$ 5,937,566
Total Non-Aviation Tenant Economic Impacts	\$ 6,909,473	\$ -	\$ 935,657	\$ 8,839,461	\$ 1,581,605	\$ -	\$ 18,266,196
TOTAL TENANT DIRECT IMPACTS							
Number of Jobs	396	157	70	200	132	9	964
Payroll	\$ 10,520,092	\$ 4,121,349	\$ 1,868,868	\$ 6,354,313	\$ 2,250,704	\$ 339,404	\$ 25,454,730
Taxes	\$ 270,268	\$ 213,134	\$ 117,218	\$ 166,831	\$ 66,592	\$ 8,615	\$ 842,658
Revenues	\$ 11,399,434	\$ 6,356,579	\$ 1,729,034	\$ 5,726,984	\$ 2,446,857	\$ 131,192	\$ 27,790,080
Total Direct Economic Impacts	\$ 22,189,794	\$ 10,691,062	\$ 3,715,120	\$ 12,248,128	\$ 4,764,153	\$ 479,211	\$ 54,087,468
B. Tenant Capital Spending							
Jobs	21	18	3	7	40	0	89
Economic Impact	\$ 10,358,101	\$ 53,039	\$ 400,152	\$ 73,920	\$ 2,341,685	\$ 6,344	\$ 13,233,241
C. Induced Impacts							
Total Induced Jobs	532	222	94	266	191	12	1,317
Aviation Tenants	\$ 17,127,544	\$ 12,224,273	\$ 2,944,705	\$ 3,783,225	\$ 3,608,545	\$ 533,515	\$ 40,221,807
Non-Aviation Tenants	\$ 8,396,779	\$ -	\$ 999,588	\$ 10,114,363	\$ 1,793,650	\$ -	\$ 21,304,380
Total Induced Economic Impacts	\$ 25,524,323	\$ 12,224,273	\$ 3,944,293	\$ 13,897,588	\$ 5,402,195	\$ 533,515	\$ 61,526,187
Combined Airport Tenant Impacts							
Jobs	949	397	167	473	363	21	2,370
Combined Total Economic Impacts	\$ 58,072,218	\$ 22,968,374	\$ 8,059,565	\$ 26,219,636	\$ 12,508,033	\$ 1,019,070	\$ 128,846,896

TABLE 6 - VISITOR TRIP PURPOSE & RESULTING EXPENDITURES

	Monterey Peninsula	Salinas	Hollister	Watsonville	Marina	King City	Regional Total
GENERAL AVIATION TRIP PURPOSE							
Business	66%	77%	31%	53%	NA	42%	54%
Tourism	30%	21%	64%	47%	NA	50%	42%
Other	4%	2%	5%	0%	NA	8%	4%
Average Daily Spending Per Person	\$ 967	\$ 90	\$ 149	\$ 189	NA	\$ 236	\$ 326
VISITORS USING COMMERCIAL AIRLINES							
Business	40%	NA	NA	NA	NA	NA	40%
Tourism	43%	NA	NA	NA	NA	NA	43%
Other	17%	NA	NA	NA	NA	NA	17%
Average Daily Spending Per Person	\$ 237	NA	NA	NA	NA	NA	\$ 237
DIRECT IMPACT OF VISITOR SPENDING (1)							
Jobs	3,212	28	82	83	NA	NA	3,378
Hotel	\$ 91,862,081	\$ 356,616	\$ 1,115,262	\$ 66,708	NA	NA	\$ 92,832,532
Food	\$ 31,172,784	\$ 233,791	\$ 795,226	\$ 829,858	NA	NA	\$ 32,698,970
Ground Transportation	\$ 11,799,392	\$ 194,826	\$ 834,496	\$ 186,905	NA	NA	\$ 12,503,529
Other	\$ 32,072,070	\$ 701,374	\$ 1,502,093	\$ 3,095,147	NA	NA	\$ 37,336,861
Direct Revenues	\$ 166,906,327	\$ 1,486,607	\$ 4,247,077	\$ 4,178,618	NA	NA	\$ 175,371,892
INDUCED IMPACT OF VISITOR SPENDING							
Jobs	2,473	201	63	64	NA	NA	2,801
Induced Revenues	\$ 211,971,035	\$ 1,739,330	\$ 5,011,551	\$ 4,680,052	NA	NA	\$ 223,401,968
TOTAL IMPACT OF VISITOR SPENDING							
Jobs	5,685	229	145	147	NA	NA	6,206
Total Revenues	\$ 378,877,362	\$ 3,225,937	\$ 9,258,628	\$ 8,858,670	NA	NA	\$ 400,220,597

(1) Local benefit of gross revenues; includes only visitors who responded that without the airport they would not have visited the local area.

NA = Either Not Applicable or No Data Available

Chapter 4 – Regional Airports Summary

The six publicly owned airports in the region provide a wide range of services to their communities. The Airports Economic Impact Study indicates the individual and collective economic contribution of the region's airports for business, tourism and goods movement purposes. The less tangible values describing the importance of emergency relief, agricultural services, fire suppression, recreation and use as a special facility for local events are not discussed.

Airport Operations and Based Aircraft

The Monterey Peninsula Airport is the only AMBAG regional airport that has commercial air carrier service. The commercial airlines serving this airport (United Express, American Eagle, and America West) carried 425,145 passengers in 2001.

All six publicly owned airports host general aviation activities. These airports collectively support over 368,400 operations annually. Of the total operations at the regions' airports, 214,235 are itinerant, or non-local, flight operations. Combined, there are 964 aircraft based at the six public airports.

Jobs and Payroll

The number of jobs created in the local economy and the associated payroll is an important indicator of airport contribution (Table 7). A total of 4,464 jobs are related directly to the region's airports, with an additional 1,870 indirect and 4,138 induced jobs contributed to the economy. Direct jobs generate a total payroll of \$109.9 million, while indirect jobs payroll generated another \$41.8 million and induced jobs generated \$155.3 million. The aggregate direct, indirect, and induced values for the total employment and payroll in 2001 were 10,472 jobs and \$306.9 million.

State and Local Taxes

State and local taxes for all six airports totaled \$11.5 million directly related to airport business as shown in Table 7. Tax revenues from indirect and induced economic impacts were not broken out of the total indirect and induced economic impacts in the California Airport Economic Impact Model.

Locally Generated Spending

Visitors to the AMBAG region contribute to the local economy through purchases of transportation, food, lodging and miscellaneous items (services, gifts, etc.). Table 6 indicates the types of reasons visitors come to

TABLE 7 - AMBAG REGION AIRPORTS ECONOMIC IMPACT

Impact Type	Monterey	Salinas	Hollister	Watsonville	Marina	King City	Regional Total
A. DIRECT							
Number of Jobs	3,629	203	155	291	150	9	4,464
Payroll	\$88,877,513	\$ 4,887,438	\$ 3,988,874	\$ 8,745,344	\$ 2,250,704	\$ 339,404	\$ 109,913,271
Taxes	\$ 10,628,551	\$ 266,330	\$ 275,378	\$ 240,788	\$ 66,592	\$ 8,615	\$ 11,530,249
Revenues Attributed to Airport	\$ 99,948,340	\$ 7,077,097	\$ 3,856,105	\$ 7,514,571	\$ 3,406,564	\$ 165,812	\$ 122,513,736
Total Direct Economic Impact	\$ 199,454,404	\$ 12,230,865	\$ 8,120,357	\$ 16,500,703	\$ 5,723,860	\$ 513,831	\$ 243,957,256
B. INDIRECT*							
Number of Jobs	182	95	474	1,030	-	89	1,870
Payroll	\$ 8,887,698	\$ 2,489,055	\$ 9,830,878	\$ 18,415,668	\$ -	\$ 2,132,652	\$ 41,755,951
Revenues Attributed to Airport	\$ 129,527,302	\$ 13,490,945	\$ 42,199,122	\$ 608,937,332	\$ 502,500	\$ 13,606,728	\$ 808,263,929
Total Indirect Economic Impact	\$ 138,415,000	\$ 15,980,000	\$ 52,030,000	\$ 627,353,000	\$ 502,500	\$ 15,739,380	\$ 850,019,880
C. INDUCED							
Number of Jobs	3,005	423	157	329	191	12	4,138
Payroll	\$ 94,998,144	\$ 5,585,441	\$ 3,679,153	\$ 7,431,056	\$ 2,713,669	\$ 214,904	\$ 155,275,267
Revenues Attributed to Airport	\$ 142,497,215	\$ 8,378,162	\$ 5,518,729	\$ 11,146,584	\$ 4,070,504	\$ 322,355	\$ 132,260,001
Total Induced Economic Impact	\$ 237,495,359	\$ 13,963,603	\$ 9,197,882	\$ 18,577,640	\$ 6,784,173	\$ 537,259	\$ 288,188,169
D. SUMMARY TOTALS							
Number of Jobs	6,816	721	786	1,650	341	110	10,472
Payroll	\$ 192,763,355	\$ 12,961,934	\$ 17,498,905	\$ 34,592,068	\$ 4,964,373	\$ 2,686,960	\$ 306,944,489
Taxes	\$ 10,628,551	\$ 266,330	\$ 275,378	\$ 240,788	\$ 66,592	\$ 8,615	\$ 11,530,249
Spending Attributed to Airport	\$ 242,445,555	\$ 28,946,204	\$ 51,573,956	\$ 627,598,487	\$ 7,979,568	\$ 14,094,895	\$ 1,063,037,666
Total Economic Impact	\$ 575,364,763	\$ 42,174,468	\$ 69,348,239	\$ 662,431,343	\$ 13,010,533	\$ 16,790,470	\$ 1,381,512,404

* Business community's impression of how airports benefit their business. Results reflect local business survey.

the region via the airports and in what annual amounts they distribute their economic impact. Visitor economic impacts accounted for in this study includes only surveyed visitor's who responded that without the airport they would not have visited the local area. Business related trips ranged from 31 to 77 percent of visitors surveyed. Tourism accounted for the large majority of the remaining trip purposes. The average daily expenditure by person visiting was \$326 for general aviation visitors and \$237 for visitors using commercial airlines. Average daily expenditures by general aviation visitors varied greatly by airport. Daily expenditures ranged from a low of \$90 per person at Salinas to a high of \$967 per person at Monterey Peninsula Airport. Approximately \$397 million per year is the total economic value added to the local economy by these visitors due to the presence of the regional airports.

The total economic impact of just the tenants located on the six airports is estimated to be \$128.8 million annually (Table 5). The direct and induced impacts of aviation related tenants are \$76.0 million. Non-aviation tenants add an additional impact of \$39.6 million. Tenants at the six publicly owned airports in the region provide 1,053 jobs in their communities and induce an additional 1,317 jobs.

Overall Economic Benefit

The sum of direct, indirect and induced economic parameters represents the economic impact of the region's airports. The benefits from payroll and taxes, visitor spending, local business' access to other markets, and activities related to the airport represent that economic value. In the aggregate, these represent a potential total economic impact of \$1.38 billion on the AMBAG region economy. As individual components, the total direct economic value of the region's six airports is \$243.9 million, while the indirect value totals \$850 million and the induced effects total \$288.2 million (Table 7).

Summary Analysis

It is important to note that the values indicated are the "net contribution" to the regional economy and represent those values that are contributed due to the existence of the airports.

These figures provide a "snapshot" of activities for a single reporting period annualized for a calendar year. The dollar amounts reported are estimates of the economic impact of the airports on the local economy. These estimates were produced using the California Airport Economic Impact Model. Data imputed into the Model included survey data directly from airport tenants, visitors using the airports, and local business; airport operations; and local employment figures.

The September 11, 2001 terrorist attacks had a dramatic and negative impact on commercial aviation activities. Increased passenger screening has added to the total travel time of commercial trips. Air taxi, corporate ownership, and joint ownership of aircraft have increased as a result of the increase in travel time of commercial trips. This trend, if it continues in the future, will increase the importance and benefit of general aviation airports to the region's economy.

Chapter 5 – Comparison of the 1991 and 2003 Studies

The Airports Economic Impact Study for the AMBAG region was originally conducted in 1991. Four airports were included in the 1991 study: Monterey Peninsula, Salinas, Watsonville, and Mesa Del Rey. When the 2003 study was initiated, Hollister Municipal Airport (the only publicly owned airport in San Benito County) was added and Marina Municipal Airport was added. Prior to 1995, Marina Municipal Airport was known as Fritzsche Army Airfield, part of the Fort Ord U.S. Military Reservation.

The goal of the 2003 Airports Economic Impact study is to provide the current economic impacts of the airports on the local and regional economy and for comparison to the results from the 1991 study. To that end, the California Airport Economic Impact Model developed by the California Department of Transportation (Caltrans), Division of Aeronautics was used in both studies. Use of the Caltrans model in both studies does not provide perfect consistency because the model has been updated and revised several times since it was used by AMBAG in 1991. Both the 1991 and 2003 versions of the Caltrans model are designed to evaluate the economic impacts of the airports by showing the “value added” contribution of each airport to their local economies and the entire AMBAG region.

Tables 8 and 9 provide a comparison of the results from the 1991 and 2003 studies. The annual percent change in personal income from the Bureau of Economic Analysis is used as a benchmark to compare the annual percent change between the 1991 and 2003 AEIS results.

Monterey Peninsula Airport’s dramatic increase between the two studies is for the most part due to a large increase in reported average daily spending per passenger. In 1991, general aviation passengers reported spending an average of \$318 per day. In 2003, the average daily spending for a general aviation passenger was \$967. This increase in average daily spending reflects Monterey Peninsula Airport’s focus in the past decade on serving private jet aircraft. Spending by commercial airline passenger more than doubled from \$102 to \$237. Visitor spending accounts for 66% of direct and induced economic impacts at Monterey Peninsula Airport.

At Watsonville Municipal Airport, and a lesser extent Salinas Municipal Airport, indirect economic impacts show the largest increase between the two studies. Watsonville’s large indirect impact reflects survey responses from several very large businesses that indicated they would leave the area if the Watsonville Municipal Airport were to close.

When viewing the differences in the two studies with respect to jobs, the increase in jobs (direct, indirect and induced) over the 12-year period is significant. Watsonville Municipal alone increased the total number of airport-related jobs (all categories) over six times, while Monterey Peninsula’s was approximately 4.5 times, and Salinas’ 2.6 times.

When viewing Tables 8 and 9, clearly the economic contribution of these three airports to the region’s economy over the past decade has increased significantly.

TABLE 8 - Comparison of the 1991 and 2003 Study Results						
	1991			2003		
	Monterey Peninsula	Salinas	Watsonville	Monterey Peninsula	Salinas	Watsonville
Direct Economic Impact	\$ 10,062,170	\$ 8,221,840	\$ 5,215,750	\$ 199,454,404	\$ 12,230,865	\$ 16,500,703
Direct Jobs	267	114	61	3629	203	291
Indirect Economic Impact	\$ 31,558,520	\$ 1,779,140	\$ 3,969,680	\$ 138,415,000	\$ 15,980,000	\$ 627,353,000
Indirect Jobs	533	30	61	182	95	1030
Induced Economic Impacts	\$ 56,562,400	\$ 9,982,210	\$ 9,883,900	\$ 237,495,359	\$ 13,963,603	\$ 18,577,640
Induced Jobs	708	128	127	3005	423	329
Total Impact	\$ 98,183,090	\$ 19,983,190	\$ 19,069,330	\$ 575,364,763	\$ 42,174,468	\$ 662,431,343
Total Jobs	1508	272	249	6816	721	1650

Table 9 - Annual Percent Change			
	Monterey Peninsula	Salinas	Watsonville
Direct Economic Impact	28%	3%	10%
Indirect Economic Impact	13%	20%	52%
Induced Economic Impacts	13%	3%	5%
Total Impact	16%	6%	34%
Personal Income*	5%	5%	6%

* Source: Bureau of Economic Analysis, U. S. Department of Commerce

Chapter 6 – Individual Airports Summaries

A. Monterey Peninsula Airport

The Monterey Peninsula Airport (MPA) is the sole air carrier airport in the AMBAG region. MPA serves both commercial passenger traffic and general aviation needs. MPA is unique in all of California because it is operated as a self-governing district, called the Monterey Peninsula Airport District. California State Senate Bill 1300 first bestowed this in 1941. It is classified as a Commercial/Primary Service (Air Carrier), Non-Hub Airport by the California Division of Aeronautics.

The local economy considered to be within the survey range for the Monterey Peninsula Airport begins in Carmel-by-the-Sea and includes the communities of Pacific Grove, Monterey, Sand City, Seaside, Del Rey Oaks, and Pebble Beach. The 2000 U.S. Census population of this area was 87,415. The number of jobs in the MPA area is just under 53,000.

Tourism and government dominate the local economy in this area. The Monterey Peninsula is one of the world's premier tourism destinations, including the Monterey Bay Aquarium on Cannery Row and the golf courses in Pebble Beach. Military employment has undergone significant reduction after Fort Ord's closure was initiated in 1991. Between 1990 and 2000 Federal employment lost over 22,000 jobs. Two military facilities are still located in the City of Monterey, the Naval Postgraduate School and the Defense Language Institute. These facilities account for a significant portion of the 10,440 Federal government jobs in Monterey County in 2000. Over 1,000 military flight operations occur at the Monterey Peninsula Airport annually.

Aircraft Operations

The Monterey Peninsula Airport is the only AMBAG regional airport that has commercial air carrier service. The commercial airlines serving this airport (United Express, American Eagle, and America West) carried 425,145 passengers in 2001.

The Monterey Peninsula Airport also supports general aviation activities (Table 1). One hundred and sixty nine aircraft are based at the airport. The Monterey Peninsula Airport has over 102,000 annual aircraft operations. Eighty-five percent are itinerant flight operations. Monterey Peninsula Airport sees a significantly higher number of private jets operations than the other airports in the region. The results of this high number of jet traffic can be seen in the higher than average business trip purpose and highest of the airports for general aviation average spending per person.

Jobs & Payroll

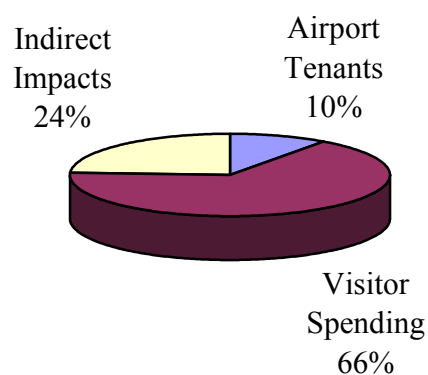
The number of jobs created in the local economy and the associated payroll is an important indicator of airport contribution (Table 7). A total of 3,629 jobs directly relate to the Monterey Peninsula Airport, with an additional 182 indirect and 3,005 induced jobs throughout the economy. Airport tenants account for 396 of the direct jobs and 532 of the induced jobs (Table 5). Direct jobs generate a total payroll of \$88.9 million, while indirect jobs payroll generate another \$8.9 million and induced jobs generate \$95 million (Table 7).

**TABLE 10 - MONTEREY PENINSULA AIRPORT
ECONOMIC IMPACTS**

Source	Jobs	Economic Impact
Airport Tenants		
Aviation Related Tenants - Direct Impacts	183	\$ 15,280,321
- Induced Impacts	221	\$ 17,127,544
Non-Aviation Tenants - Direct Impacts	213	\$ 6,909,473
- Induced Impacts	311	\$ 8,396,779
Combined Tenant Capital Spending	21	\$ 10,358,101
Total Airport Tenant Impacts	949	\$ 58,072,218
Visitor Spending		
Direct Impacts	3212	\$ 166,906,327
Induced Impacts	2473	\$ 211,971,035
Total Visitor Spending Impacts	5685	\$ 378,877,362
Indirect Impacts*	182	\$ 138,415,000
Total Impacts	6816	\$ 575,364,763

* Business community's impression of how airports benefit their business. Results reflect local business survey.

FIGURE 3 - Percentage Impact by Source



State & Local Taxes

State and local taxes accrued from the direct economic impact of airport related business totaled \$10.6 million (Table 7). Tax revenues from indirect and induced economic impacts were not broken out of the total indirect and induced economic impacts in the California Airport Economic Impact Model.

Locally Generated Spending

Visitors to the area served by the Monterey Peninsula Airport contribute to the local economy through purchases of transportation, food, lodging and miscellaneous items (services, gifts, etc.). Table 6 indicates the types of reasons visitors come to the area served by the Monterey Peninsula Airport and in what annual amounts they distribute their economic impact. Sixty-six percent of general aviation visitor trips and 40 percent of visitor trips using commercial airlines are business related. The average daily expenditure by visitor is \$967 for general aviation visitors and \$237 for visitors using commercial airlines. Visitors who would not have visited the Monterey Peninsula area without the Monterey Peninsula Airport contribute an estimated \$378.9 million to the local economy.

The total economic impact of just the tenants at Monterey Peninsula Airport is estimated to be \$58.1 million annually (Table 5). The direct and induced impacts of aviation related tenants are \$32.4 million. Non-aviation tenants add an additional impact of \$15.3 million. Tenants at the Monterey Peninsula Airport provide 396 jobs in their communities and induce an additional 553 jobs.

Overall Economic Benefit

The sum of direct, indirect and induced economic parameters represents the economic impact of the Monterey Peninsula Airport. The benefits from payroll and taxes, visitor spending, local businesses access to markets, and activities related to the airport represent that economic value. In combination, these represent a potential total estimated economic impact of \$575.4 million on the area's economy served by the Monterey Peninsula Airport. As individual components, the total direct economic impact of the Monterey Peninsula Airport is \$199.5 million, while the indirect impact totals \$138.4 million and the induced effects total \$237.5 million. Table 10 summarizes economic impacts by source (airport tenants, visitor spending, and indirect impacts) for the Monterey Peninsula Airport while Figure 3 graphs these source impacts. Visitor spending accounts for 66% of total economic impact of Monterey Peninsula Airport. Airport tenants account for 10% of the economic impact and indirect accounts for the remaining 24% of impacts.

Summary Analysis

It is important to note that the values indicated are the "net contribution" to the regional economy and represent those values that are contributed due to the existence of the Monterey Peninsula Airport.

These figures provide a "snapshot" of activities for a single reporting period annualized for a calendar year. The dollar amounts reported are estimates of the economic impact of the Airport on the local economy. These estimates were produced using the California Airport Economic Impact Model. Data imputed into the Model included survey data directly from airport tenants, visitors using the airports, and local business; airport operations; and local employment figures.

B. Salinas Municipal Airport

The Salinas Municipal Airport is physically the largest general aviation airport in the AMBAG region covering 763 acres. The Salinas Municipal Airport is located within city limits, three miles southeast of downtown Salinas. Salinas Municipal Airport is classified by California Department of Transportation as a Regional Airport, serving recreation flying, training, and local emergencies as well as access to other regions. Regional airports provide additional services compared to smaller Community airports. Regional airports can accommodate most business, multi-engine and jet aircraft; provide most services for pilots and aircraft, including jet fuel; and have a published instrument approach.

Constructed by the U.S. Army during World War II, its initial use as a military airfield was later phased out when the facility was deeded to the City of Salinas. In addition to private personal flight operations, Salinas Municipal Airport is the primary airport in the region for agricultural crop dusting. The Airport's 6,000-foot runway with full Instrument Landing System provides ample accessibility for business jets.

Salinas Municipal Airport is home to the California International Airshow, one of the largest air shows in California. The California International Airshow attracts an attendance of 80,000 annually. Over the 20-year history of the airshow, over \$5.5 million have been generated for local charities.

The 2000 U.S. Census estimate of the City of Salinas' population was 143,776. The City of Salinas is the county seat for Monterey County and is the center of the region's agricultural industry. Major Salinas employers include: Household Credit Services, McCormick/Schilling, and numerous agricultural produce packing firms. Corporate flights to growing areas outside of the Salinas Valley such as Yuma, Arizona and Mexico expands Salinas Municipal Airport's benefit to agricultural related business beyond the traditional aerial pesticide application business.

Aircraft Operations

Salinas Municipal Airport supports general aviation activities (Table 1). Approximately 230 aircraft are based at the airport. Salinas Municipal Airport has over 89,000 flight operations annually. Itinerant flight operations account for 53% of all flight operations.

Jobs & Payroll

The number of jobs created in the local economy and the associated payroll is an important indicator of airport contribution (Table 7). A total of 203 jobs are related directly to the Salinas Municipal Airport, with an additional 95 indirect and 423 induced jobs throughout the economy. Airport tenants account for 157 of the direct jobs and induce an additional 240 jobs (Table 5). Direct jobs generate a total payroll of \$4.9 million, while indirect jobs payroll generated another \$2.5 million and induced jobs generated a payroll of \$5.6 million (Table 7).

State & Local Taxes

State and local taxes accrued from the direct economic impact of airport related business totaled \$266 thousand (Table 7). Tax revenues from indirect and induced economic impacts were not

broken out of the total indirect and induced economic impacts in the California Airport Economic Impact Model.

Locally Generated Spending

Visitors to the area served by the Salinas Municipal Airport contribute to the local economy through purchases of transportation, food, lodging and miscellaneous items (services, gifts, etc.). Table 6 indicates the types of reasons visitors come to the area served by the Salinas Municipal Airport and in what annual amounts they distribute their economic impact. Business trips accounted for 77% of the reported trip purposes, the highest of the airports in the region. Tourism accounted for 21% of the remaining trips. The average daily expenditure reported by visitors was \$90. Visitors who would not have visited the area without the Salinas Municipal Airport contribute an estimated \$3.2 million annually to the local economy.

The total economic impact of just the tenants at Salinas Municipal Airport is estimated to be \$23 million annually (Table 5). All of Salinas Municipal Airport's current tenants are aviation related businesses.

Overall Economic Benefit

The sum of direct, indirect and induced economic parameters represents the economic impact of the Salinas Municipal Airport. The benefits from payroll and taxes, visitor spending, local businesses access to markets, and activities related to the airport represent that economic value. In combination, these represent an estimated potential total economic impact of \$42.2 million on the area's economy served by the Salinas Municipal Airport. As individual components, the total direct economic value of the Salinas Municipal Airport is \$12.2 million, while the indirect value totals \$16 million and the induced effects total \$14 million. Economic impacts for the Salinas Municipal Airport are shown in Table 7.

The indirect economic benefit reflects local non-aviation related businesses perception of the importance of Salinas Municipal Airport. Indirect economic impacts are calculated in the California Airport Economic Impact Model based on survey results from local businesses that reported the number of employees who would be laid off and the revenue losses that would result from the Airport's closure. The local business survey for the Salinas Municipal Airport was sent to a sample of businesses within the City of Salinas and the surrounding unincorporated Monterey County environ. The nature of the agricultural industries reliance on farmable land eliminates the option for business to relocate if an airport closes. The true benefit of the Salinas Municipal Airport to the agricultural industry is greater than reported in this study.

The economic impacts of Salinas Municipal Airport by the impact's source: airport tenants, visitor spending, and indirect impacts are listed in Table 11 and graphed in Figure 4. Airport tenants accounts for 54% of total economic impact of Salinas Municipal Airport. Indirect impacts account for 38% of the economic impact and visitor spending accounts for the remaining 8% of impacts.

Summary Analysis

It is important to note that the values indicated are the "net contribution" to the regional economy and represent those values that are contributed due to the existence of the Salinas Municipal

Airport.

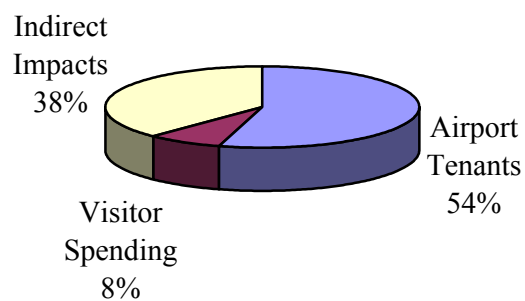
These figures provide a "snapshot" of activities for a single reporting period annualized for a calendar year. The dollar amounts reported are estimates of the economic impact of the Airport on the local economy. These estimates were produced using the California Airport Economic Impact Model. Data imputed into the Model included survey data directly from airport tenants, visitors using the airports, and local business; airport operations; and local employment figures.

**TABLE 11 - SALINAS MUNICIPAL AIRPORT
ECONOMIC IMPACTS**

Source	Jobs	Economic Impact
Airport Tenants		
Aviation Related Tenants - Direct Impacts	157	\$ 10,691,062
- Induced Impacts	222	\$ 12,224,273
Non-Aviation Tenants - Direct Impacts	-	\$ -
- Induced Impacts	-	\$ -
Combined Tenant Capital Spending	18	\$ 53,039
Total Airport Tenant Impacts	397	\$ 22,968,374
Visitor Spending		
Direct Impacts	28	\$ 1,486,607
Induced Impacts	201	\$ 1,739,330
Total Visitor Spending Impacts	229	\$ 3,225,937
Indirect Impacts*	95	\$ 15,980,000
Total Impacts	721	\$ 42,174,311

* Business community's impression of how airports benefit their business. Results reflect local business survey.

FIGURE 4 - Percentage Impact by Source



C. Hollister Municipal Airport

The Hollister Municipal Airport is the sole publicly owned airport in San Benito County. The Hollister Municipal Airport is located approximately three miles north of Hollister's city center. Hollister Municipal Airport is classified by California Department of Transportation as a Regional Airport, serving recreation flying, training, and local emergencies as well as access to other regions. Regional airports provided additional services compared to Community airports. Regional airports can accommodate most business, multi-engine and jet aircraft; provide most services for pilots and aircraft, including jet fuel. The Hollister Municipal Airport hosts a diverse set of users including gliders, skydiving, and California Department of Forestry fire fighting air operations from June through October.

The population of the City of Hollister in 2000 per the U.S. Census was 34,413. The total population for San Benito County in 2000 was 53,234.

Aircraft Operations

Hollister Municipal Airport supports general aviation activities and a California Department of Forestry firefighting base (Table 1). Approximately 145 aircraft are based at the airport. Hollister Municipal Airport has an estimated 55,000 flight operations annually. Fifty-seven percent are itinerant flight operations.

Jobs & Payroll

The number of jobs created in the local economy and the associated payroll is an important indicator of airport contribution (Table 7). A total of 155 jobs are related directly to the Hollister Municipal Airport, with an additional 474 indirect and 157 induced jobs throughout the economy. Airport tenants account for 70 of the direct jobs and 97 induced jobs attributed to the Airport (Table 5). Direct jobs generate a total payroll of \$4 million, while indirect jobs payroll generated another \$9.8 million and induced jobs generated a payroll of \$3.7 million (Table 7).

State & Local Taxes

State and local taxes accrued from the direct economic impact of airport related business totaled \$275 thousand (Table 7). Tax revenues from indirect and induced economic impacts were not broken out of the total indirect and induced economic impacts in the California Airport Economic Impact Model.

Locally Generated Spending

Visitors to the area served by the Hollister Municipal Airport contribute to the local economy through purchases of transportation, food, lodging and miscellaneous items (services, gifts, etc.). Table 6 indicates the types of reasons visitors come to the area served by the Hollister Municipal Airport and in what annual amounts they distribute their economic impact. Business trips accounted for 31% of the reported trip purposes. Sixty-four percent of trips were tourism related. The remaining 5% were labeled "other." The average daily expenditure reported by visitors was \$149. Visitors who would not have visited the area without the Hollister Municipal Airport contribute an estimated \$9.3 million to the local economy.

The total economic impact of just the tenants at Hollister Municipal Airport is estimated to be

\$8.1 million annually (Table 5). The direct and induced impacts of aviation related tenants are \$5.7 million. Non-aviation tenants add an additional impact of \$1.9 million. Tenants at Hollister Municipal Airport provide 70 jobs in their communities and induce an additional 97 jobs.

Overall Economic Benefit

The sum of direct, indirect and induced economic parameters represents the economic impact of the Hollister Municipal Airport. The benefits from payroll and taxes, visitor spending, local businesses access to markets, and activities related to the airport represent that economic value. In combination, these represent an estimated potential total economic impact of \$69.3 million on the area's economy served by the Hollister Municipal Airport. As individual components, the total direct economic value of the Hollister Municipal Airport is \$8.1 million, while the indirect value totals \$52 million and the induced effects total \$9.2 million. Economic impacts for the Hollister Municipal Airport are shown in Table 7.

The economic impacts of Hollister Municipal Airport by the impact's source: airport tenants, visitor spending, and indirect impacts are listed in Table 12 and graphed in Figure 5. Indirect impacts account for 75% of total economic impact of Hollister Municipal Airport. Airport tenants account for 12% of the economic impact and visitor spending accounts for the remaining 13% of impacts.

The indirect economic benefit reflects local non-aviation related businesses perception of the importance of Hollister Municipal Airport. Surveys were sent to businesses throughout San Benito County.

Summary Analysis

It is important to note that the values indicated are the "net contribution" to the regional economy and represent those values that are contributed due to the existence of the Hollister Municipal Airport.

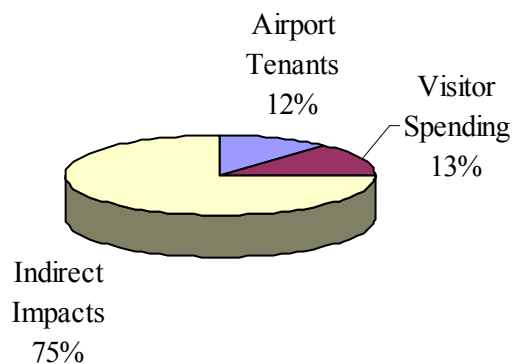
These figures provide a "snapshot" of activities for a single reporting period annualized for a calendar year. The dollar amounts reported are estimates of the economic impact of the Airport on the local economy. These estimates were produced using the California Airport Economic Impact Model. Data imputed into the Model included survey data directly from airport tenants, visitors using the airports, and local business; airport operations; and local employment figures.

**TABLE 12 - HOLLISTER MUNICIPAL AIRPORT
ECONOMIC IMPACTS**

Source	Jobs	Economic Impact
Airport Tenants		
Aviation Related Tenants - Direct Impacts	46	\$ 2,779,463
- Induced Impacts	63	\$ 2,944,705
Non-Aviation Tenants - Direct Impacts	24	\$ 935,657
- Induced Impacts	31	\$ 999,588
Combined Tenant Capital Spending	3	\$ 400,152
Total Airport Tenant Impacts	167	\$ 8,059,565
Visitor Spending		
Direct Impacts	82	\$ 4,247,077
Induced Impacts	63	\$ 5,011,551
Total Visitor Spending Impacts	145	\$ 9,258,628
Indirect Impacts*	474	\$ 52,030,000
Total Impacts	786	\$ 69,348,193

* Business community's impression of how airports benefit their business. Results reflect local business survey.

FIGURE 5 - Percentage Impact by Source



D. Watsonville Municipal Airport

The Watsonville Municipal Airport is the sole public use airport in Santa Cruz County. The Watsonville Municipal Airport is located approximately three miles northwest of Watsonville's city center. Watsonville Municipal Airport is classified by California Department of Transportation as a Regional Airport, serving recreation flying, training, and local emergencies as well as access to other regions. Regional airports provide additional services compared to smaller Community airports. Regional airports can accommodate most business, multi-engine and jet aircraft; provide most services for pilots and aircraft, including jet fuel; and have a published instrument approach.

The Watsonville Municipal Airport site was acquired by the City of Watsonville in 1939, and except for U.S. Navy use from 1943 to 1945, the airport has been used as a general aviation facility. In addition to business and personal flight operations, Watsonville Municipal Airport is a popular airport for pilot training activities.

Agriculture and government dominate the local economy in this area. Major employers in the City include Coastal Berry Co., Granite Construction and West Marine Products. Additionally, the Watsonville Municipal Airport serves as one of the gateways to destinations for business and tourism within the Santa Cruz beach and mountains area and the Monterey Peninsula. The population of the City of Watsonville in 2000 per the U.S. Census was 44,265.

Aircraft Operations

Watsonville Municipal Airport supports general aviation activities (Table 1). Approximately 331 aircraft are based at the airport. Watsonville Municipal Airport has an estimated 90,000 flight operations annually. Forty percent are itinerant flight operations.

Jobs & Payroll

The number of jobs created in the local economy and the associated payroll is an important indicator of airport contribution (Table 7). A total of 291 jobs are related directly to the Watsonville Municipal Airport, with an additional 1,030 indirect and 329 induced jobs throughout the economy. Airport tenants account for 200 of the direct jobs and 273 induced jobs attributed to the Airport (Table 5). Direct jobs generate a total payroll of \$8.7 million, while indirect jobs payroll generated another \$18.4 million and induced jobs generated a payroll of \$7.4 million (Table 7).

State & Local Taxes

State and local taxes accrued from the direct economic impact of airport related business totaled \$241 thousand (Table 7). Tax revenues from indirect and induced economic impacts were not broken out of the total indirect and induced economic impacts in the California Airport Economic Impact Model.

Locally Generated Spending

Visitors to the area served by the Watsonville Municipal Airport contribute to the local economy through purchases of transportation, food, lodging and miscellaneous items (services, gifts, etc.). Table 6 indicates the types of reasons visitors come to the area served by the Watsonville

Municipal Airport and in what annual amounts they distribute their economic impact. Business trips accounted for 53% of the reported trip purposes. The remaining 47% of trips were tourism related. The average daily expenditure reported by visitors was \$189. Visitors who would not have visited the area without the Watsonville Municipal Airport contribute an estimated \$8.9 million to the local economy.

The total economic impact of just the tenants at Watsonville Municipal Airport is estimated to be \$26.2 million annually (Table 5). The direct and induced impacts of aviation related tenants are \$7.2 million. Non-aviation tenants add an additional impact of \$19 million.

Overall Economic Benefit

The sum of direct, indirect and induced economic parameters represents the economic impact of the Watsonville Municipal Airport. The benefits from payroll and taxes, visitor spending, local businesses access to markets, and activities related to the airport represent that economic value. In combination, these represent an estimated potential total economic impact of \$662.4 million on the area's economy served by the Watsonville Municipal Airport. As individual components, the total direct economic value of the Watsonville Municipal Airport is \$16.5 million, while the indirect value totals \$627.4 million and the induced effects total \$18.6 million. Economic impacts for the Watsonville Municipal Airport are shown in Table 7.

The economic impacts of Watsonville Municipal Airport by the impact's source: airport tenants, visitor spending, and indirect impacts are listed in Table 13 and graphed in Figure 6. Indirect impacts account for 95% of total economic impact of Watsonville Municipal Airport. Airport tenants account for 4% of the economic impact and visitor spending accounts for the remaining 1% of impacts.

The indirect economic benefit reflects local non-aviation related businesses perception of the importance of Watsonville Municipal Airport. The local economy considered to be within the survey range for the Watsonville Municipal Airport includes the City of Watsonville and unincorporated southern Santa Cruz County environs as far south as the southern boundary for the County and as far north as the community of Aptos. The model calculation for indirect economic impacts for Watsonville Municipal Airport is significantly larger than the indirect economic impact calculated for the other airports in the AMBAG region. This substantial indirect economic impact is the direct result of several very large businesses that reported in the local business survey that they would leave the area if the Watsonville Municipal Airport ceased to exist.

Summary Analysis

It is important to note that the values indicated are the "net contribution" to the regional economy and represent those values that are contributed due to the existence of the Watsonville Municipal Airport.

These figures provide a "snapshot" of activities for a single reporting period annualized for a calendar year. The dollar amounts reported are estimates of the economic impact of the Airport on the local economy. These estimates were produced using the California Airport Economic Impact Model. Data imputed into the Model included survey data directly from airport tenants,

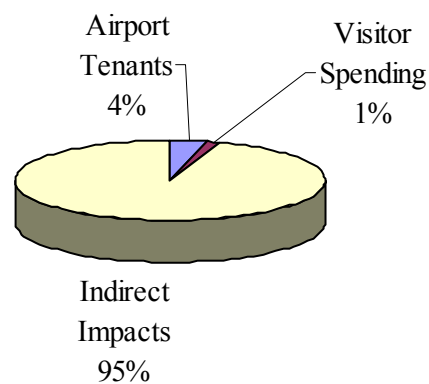
visitors using the airports, and local business; airport operations; and local employment figures.

**TABLE 13 - WATSONVILLE MUNICIPAL
AIRPORT ECONOMIC IMPACTS**

Source	Jobs	Economic Impact
Airport Tenants		
Aviation Related Tenants - Direct Impacts	37	\$ 3,408,667
- Induced Impacts	55	\$ 3,783,225
Non-Aviation Tenants - Direct Impacts	163	\$ 8,839,461
- Induced Impacts	211	\$ 10,114,363
Combined Tenant Capital Spending	7	\$ 73,920
Total Airport Tenant Impacts	473	\$ 26,219,636
Visitor Spending		
Direct Impacts	83	\$ 4,178,618
Induced Impacts	64	\$ 4,680,052
Total Visitor Spending Impacts	147	\$ 8,858,670
Indirect Impacts*	1,030	\$ 627,353,000
Total Impacts	1,650	\$ 662,431,306

* Business community's impression of how airports benefit their business.
Results reflect local business survey.

**FIGURE 6 - Percentage Impact by
Source**



E. Marina Municipal Airport

Marina Municipal Airport is the newest general aviation airport in the area. Originally constructed in 1960 as Fritzsche Army Airfield, the airport was transferred to the City of Marina in 1995 after the closure of the Fort Ord U.S. Military Reservation.

The Marina Municipal Airport is located on the eastern boundary of Marina, within the city limits. Marina Municipal Airport is classified by California Department of Transportation as a Community Airport, serving recreational flying, training, and local emergencies as well as access to other regions. In addition to regular flight operations, skydiving operations are conducted at the Airport.

Statistically, the number of visitor surveys collected from this facility was too few to fit the parameters of the California Airport Economic Impact Model. Because of this, the Marina Municipal Airport summary is less descriptive than that for the larger airports evaluated in this study.

Aircraft Operations

Flight operations at Marina Municipal Airport are estimated to be 20,000 annually. Transient operations are estimated to account for 40% of the total operations. Marina Municipal Airport has an estimated 65 aircraft based at the facility.

Jobs & Payroll

The number of jobs created in the local economy and the associated payroll is an important indicator of airport contribution (Table 7). A total of 150 jobs are related directly to the Marina Municipal Airport, with an additional 191 induced jobs throughout the economy. Airport tenants account for 132 of the direct jobs and 231 induced jobs attributed to the Airport (Table 5). Direct jobs generate a total payroll of \$2.3 million, while induced jobs rated a payroll of \$2.7 million (Table 7).

State & Local Taxes

State and local taxes accrued from the direct economic impact of airport related business totaled \$66,592 (Table 7). Tax revenues from indirect and induced economic impacts were not broken out of the total indirect and induced economic impacts in the California Airport Economic Impact Model.

Locally Generated Spending

Local business surveys were sent to 40 businesses and returned by 22 businesses. The 55% local business survey response rate was the highest of the airports included in this study. For the purposes of this study the local economy served by the Marina Municipal Airport covers the incorporated boundaries of the City of Marina. Of the 675 jobs in the City of Marina, survey respondents provided 469 of the jobs. Results of the local business survey are calculated as the “indirect impacts” of the airport and reflect local businesses impression of Marina Municipal Airport’s importance to their business. Local businesses surveyed reported that of their jobs, none were directly tied to the existence of Marina Municipal Airport. Revenues attributed to the Airport are estimated to be approximately \$502,500 per year.

Overall Economic Benefit

The total economic impact of just the tenants at Marina Municipal Airport is estimated to be \$12.5 million annually (Table 5). The direct and induced impacts of aviation related tenants are \$6.8 million. Non-aviation tenants add an additional impact of \$3.4 million. Tenants at the Marina Municipal Airport provide 132 jobs in their community and induce an additional 231 jobs.

The economic impacts of Marina Municipal Airport by the impact's source: airport tenants and indirect impacts are listed in Table 14 and graphed in Figure 7. Airport tenants account for 96% of total economic impact of Marina Municipal Airport. Indirect impacts accounts for the remaining 4% of impacts.

Summary Analysis

It is important to note that the values indicated are the "net contribution" to the regional economy and represent those values that are contributed due to the existence of the Marina Municipal Airport. The beneficial economic impacts of the Airport's visitor spending are not included due to the limited sample size.

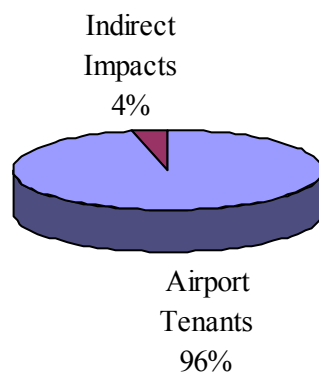
These figures provide a "snapshot" of activities for a single reporting period annualized for a calendar year. The dollar amounts reported are estimates of the economic impact of the Airport on the local economy. These estimates were produced using the California Airport Economic Impact Model. Data imputed into the Model included survey data directly from airport tenants, visitors using the airports, and local business; airport operations; and local employment figures.

**TABLE 14 - MARINA MUNICIPAL AIRPORT
ECONOMIC IMPACTS**

Source	Jobs	Economic Impact
Airport Tenants		
Aviation Related Tenants - Direct Impacts	44	\$ 3,182,548
- Induced Impacts	74	\$ 3,608,545
Non-Aviation Tenants - Direct Impacts	88	\$ 1,581,605
- Induced Impacts	117	\$ 1,793,650
Combined Tenant Capital Spending	18	\$ 2,341,685
Total Airport Tenant Impacts	341	\$ 12,508,033
Visitor Spending		
Direct Impacts	NA	NA
Induced Impacts	NA	NA
Total Visitor Spending Impacts	-	\$ -
Indirect Impacts*	-	\$ 502,500
Total Impacts	341	\$ 13,010,533

* Business community's impression of how airports benefit their business.
Results reflect local business survey.

**FIGURE 7 - Percentage Impact by
Source**



F. Mesa Del Rey Airport

Mesa Del Rey (King City) Airport is the smallest of the publicly operated general aviation facilities in the area. Statistically, the number of visitor surveys collected from this facility was too few to fit the parameters of the California Airport Economic Impact Model. Because of this, the Mesa Del Rey (King City) Airport summary is less descriptive than that for the larger airports evaluated in this study.

The Mesa Del Rey (King City) Airport is located on the north boundary of King City within the city limits. The impact area of this facility is from Greenfield in the north southward to the Monterey County boundary. Mesa Del Rey is classified by California Department of Transportation as a Community Airport, serving recreation flying, training, and local emergencies as well as access to other regions.

Acquired in 1940 from the Spreckels Sugar Company, the airport has been operated by the military during World War II and on lease to others through 1951, after which the property has been under city control. Only three businesses are located on Airport property. Confidentiality prevents reporting of statistics for the on-airport businesses.

The U.S. Census reports King City's 2000 population as 11,094, a 45% increase since 1990. There was significant population growth in South Monterey County cities in the decade between 1990 and 2000. With a 45% increase in population during the decade, King City's percentage growth was the lowest of the four incorporated communities in South Monterey County.

Aircraft Operations

Flight operations at Mesa Del Rey Airport are estimated to be 12,200 annually. Transient operations are estimated to account for 40% of the total operations. Mesa Del Rey has an estimated 30 aircraft based at the facility.

Jobs & Payroll

Mesa Del Rey Airport directly generates 9 jobs and induces an additional 12 jobs for the community. The combined payroll for direct and induced jobs is estimated to be \$554 thousand annually.

State & Local Taxes

State and local taxes accrued from the direct economic impact of airport related business totaled \$8,615 (Table 7). Tax revenues from indirect and induced economic impacts were not broken out of the total indirect and induced economic impacts in the California Airport Economic Impact Model.

Locally Generated Spending

Agriculture and government dominate the local economy in this area. Local business surveys were sent to 83 businesses and returned by 18 businesses. Of the 3,695 jobs in the King City area, survey respondents provided 1,435 of the jobs. Results of the local business survey are calculated as the "indirect impacts" of the airport and reflect local business's impression of Mesa Del Rey's importance to their business. Model results report 89 local jobs, representing a payroll

of over \$2 million, are indirectly due to the existence of Mesa Del Rey Airport. Indirect revenues attributed to the Airport are estimated to be almost \$14 million. These results show there are a number of local businesses that utilize the services of the airport.

Overall Economic Benefit

The economic impacts of Mesa Del Rey Airport include direct impacts of approximately \$514 thousand annually, induced impacts of \$537 thousand, and indirect impacts of \$15.7 million. The total economic impacts for the airport add up to an estimated \$16.8 million annually.

The total economic impact of only the tenants at Mesa Del Rey Airport is estimated to be approximately \$1.0 million annually (Table 5). The direct and induced impacts of aviation related tenants are the \$1.0 million. Tenants at Mesa Del Rey Airport provide 9 jobs in their community and induce an additional 12 jobs.

The economic impacts of Mesa Del Rey Airport by the impact's source: airport tenants and indirect impacts are listed in Table 15 and graphed in Figure 8. Indirect impacts account for 94% of the total economic impact of Mesa Del Rey Airport. Airport tenants account for the remaining 6% of impacts.

Summary Analysis

It is important to note that the values indicated are the "net contribution" to the regional economy and represent those values that are contributed due to the existence of the Mesa Del Rey Airport. The beneficial economic impacts of the Airport's tenants and visitor spending are not broken out because of confidentiality considerations due to the limited sample size.

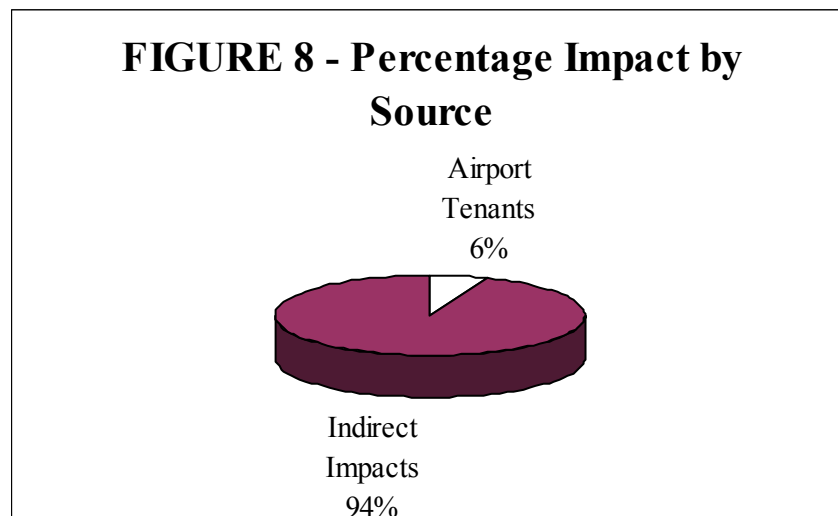
These figures provide a "snapshot" of activities for a single reporting period annualized for a calendar year. The dollar amounts reported are estimates of the economic impact of the Airport on the local economy. These estimates were produced using the California Airport Economic Impact Model. Data imputed into the Model included survey data directly from airport tenants, visitors using the airports, and local business; airport operations; and local employment figures.

**TABLE 15 - MESA DEL REY AIRPORT
ECONOMIC IMPACTS**

Source	Jobs	Economic Impact
Airport Tenants		
Aviation Related Tenants - Direct Impacts	9	\$ 479,211
- Induced Impacts	12	\$ 533,515
Non-Aviation Tenants - Direct Impacts	-	\$ -
- Induced Impacts	-	\$ -
Combined Tenant Capital Spending	-	\$ 6,344
Total Airport Tenant Impacts	21	\$ 1,019,070
Indirect Impacts*	89	\$ 15,739,380
Total Impacts	110	\$ 16,758,450

* Business community's impression of how airports benefit their business. Results reflect local business survey.

FIGURE 8 - Percentage Impact by Source



APPENDIX

Survey Form Examples

Hollister Municipal Airport

Dear Business Manager:

The Association of Monterey Bay Area Governments (AMBAG) is conducting a study to determine the impact of the Hollister Municipal Airport on the local economy. We request your assistance. Completion of this survey will help us in providing cost effective, high quality aviation services. The information you provide will be kept strictly confidential and will only be used as part of the aggregate for the study results. If you have any questions, please contact Todd Muck at (831) 883-3750.

Sincerely,

Allen Ritter
Airport Manager

Local Business Survey

1) Zip code of business location? _____

2) Type of business?

Agricultural _____ Manufacturing _____ Service/Commercial _____
Government _____ Retail/Commercial _____ Tourism Related _____
Other (Please Specify) _____

3) What would be the effect on your business if the airport should close? (Complete as many responses as applicable.)

- a) Lay off _____ employees. (Please combine part-time and full-time employees.)
- b) Lose \$ _____ in gross revenues.
- c) _____ Business would relocate.
- d) _____ No effect on business.
- e) _____ Other. _____

4) Estimated annual gross revenues? (At this location only.) (For fiscal year ending _____)

- a) Either indicate amount if you can release it: _____
- b) Or, mark appropriate range on scale below. (If necessary fill in your own range.)

0 | 50 | 100 | 200 | 300 | 400 | 500 | _____ |
(thousand \$)

5) How many employees do you have? (Please combine part-time and full-time employees to a full-time average number of employees.) _____

6) What is your total annual payroll? \$ _____

7) Comments you may have on airport and/or economic impact study:

Optional information:

Name of company _____

Name of respondent _____

Address _____

Phone _____

Please use the enclosed postage-paid envelope to return this survey to:

AMBAG
P.O. Box 809
Marina, CA 93933-0809

Salinas Municipal Airport

The Association of Monterey Bay Area Governments (AMBAG) is conducting an economic impact study of the Salinas Municipal Airport. Completion of this questionnaire will help us in providing high quality and cost effective aviation services. The information that you provide will be kept strictly confidential. Your time in filling it out is much appreciated. If you have any questions, please contact Todd Muck at (831) 883-3750.

Mark Bautista
Airport Manager

Airport Tenant Survey

The following questions pertain to business operations at this location only

1. What is your type of business?

- a) _____ Aviation-related fixed base operator (maintenance, charter, fuel sales, flying school, airport administration, etc.)
b) _____ Non-aviation related airport tenant

2. What are your approximate annual gross revenues for fiscal year ending _____?

- a) Either indicate amount if you can release it: \$ _____
b) Or, mark range on scale below: (If necessary, please fill in *your* range.)

50	100	200	300	400			
----	-----	-----	-----	-----	--	--	--

(thousands \$)

3. What is your estimated percentage of gross revenues which consists of taxable sales?

_____ % All percent input is in whole numbers,
i.e. 10 percent is entered as 10.

4. What are your annual gross sales of aviation fuel? (If applicable.)

- a) Avgas: \$ _____ b) Jet fuel: \$ _____

5. What are your annual operating expenses? (Do not include capital expenditures, building rentals and aircraft landing and parking fees.)

- a) Cost of goods, services and retails \$ _____
b) Payroll and benefits \$ _____

6. How much are your annual business property taxes? \$ _____

7. What is the approximate percentage of the cost of goods and services (question 5a) which consist of payments made in the following areas?

- a) City of Salinas _____ %
b) Elsewhere _____ %

8. How many employees do you have? (Please convert part-time employees to full-time.)

Monterey Peninsula Airport

Dear Air Traveler:

The Association of Monterey Bay Area Governments (AMBAG) is conducting an economic impact study of the Monterey Peninsula Airport. Completion of this questionnaire will help us in the funding and provision of cost effective, high quality aviation services. Your time in filling it out is much appreciated. If you have any questions, please contact Todd Muck at (831) 883-3750.

Denis Horn
Airport General Manager

Visitor Survey

Date: _____

1. Where is your place of residence?

City _____
State _____
Country (if not U.S.) _____

2. What is the primary purpose of your visit to this area?

a) Business _____
b) Tourism or visiting friends _____
c) Conference _____
c) Other _____

3. What area will (or did) you stay during your visit?

Island (Cities of Monterey, Pacific Grove, Seaside, Carmel, Pebble Beach or _____
Elsewhere [please list area(s)] _____

4. How long will (or did) you stay in each area?

Monterey Peninsula _____ days _____ nights
Elsewhere _____ days _____ nights

5. If you will (or did) stay overnight where will (or did) you stay? (Check as many as applicable.)

a) Hotel/motel _____
b) Friends/relatives _____
c) Other (please specify) _____

6. If the airport did not exist would you still have made the trip?

- a) Definitely yes _____
- b) Probably _____
- c) Unlikely _____
- d) Definitely not _____

7. What are your **group's** total expenses on this trip for your entire stay in *each* area?

	Monterey Peninsula	Elsewhere
a) Hotel/motel	\$ _____	\$ _____
b) Food and Beverages	\$ _____	\$ _____
c) Ground transportation	\$ _____	\$ _____
d) Other (do not include aviation fuel)	\$ _____	\$ _____

8. What type of air transportation will (or did) you use on this trip?

- a) My own private plane _____
- b) Rental plane _____
- c) Company plane _____
- d) Commercial flight _____
- e) Other (please specify) _____

9) How many people will be (or were) in the plane (*including pilot*)? _____
(This question is for General Aviation visitors only.)

10) Where did your flight originally start from?

Airport _____ City _____ State _____

What are your comments on the airport and/or this economic impact study?

Thank you for completing this questionnaire!