



# Rural Pennsylvania

A Legislative Agency of the Pennsylvania General Assembly

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## Landing on a Rural Opportunity

### Summary

Aero-tourism is a relatively new market niche in the tourism industry. Since there is no standard definition for the concept at this time, the Center for Rural Pennsylvania loosely defines the concept as getting pilots and passengers from a local airport to surrounding areas of interest. While it is unlikely that aero-

tourism will dominate the rural tourism market, it has the potential to play a supporting role. And, like other rural tourism niches, such as nature-based tourism, heritage tourism, and farm vacations,

aero-tourism needs to be further developed and marketed to the traveling public.

### Methods

To better understand aero-tourism and its opportunities for rural communities, the Center for Rural Pennsylvania analyzed four sources of data.

The first source used for the analysis was the Pennsylvania Department of Transportation's (PennDOT) *Commonwealth of Pennsylvania Airport Directory*, published by the Bureau of Aviation in 1999. The directory lists licensed public airports within the state, the services they provide, hours of operation, and any amenities provided. For a definition of public airports, see the box on page 3.

Information on the number of operations, or landings and take-offs, by airport was also obtained from the Pennsylvania Bureau of Aviation as well as a 2000

study on the Economic Impact of Aviation in Pennsylvania.

The second data source was from the Federal Aviation Administration (FAA) and was used to identify the number of licensed pilots by county and by states surrounding Pennsylvania, including Delaware, Maryland, New Jersey, New York, Ohio, and West Virginia. The data included active licensed pilots as of December 31, 1998. This information was used to assess the size of the aero-tourism market.

The third source was a report by the Aircraft Owners and Pilots Association (AOPA). This report examined the demographic and socio-economic characteristics of member pilots. Although the report does not include the characteristics of non-members and is national in scope, it is useful for understanding the types of pilots who may be visiting rural Pennsylvania.

The final source was an informal phone survey of rural tourism promotion agencies (TPA). The executive directors of the TPAs were asked five questions focusing on the role that public airports had on tourism in their region. Fifteen rural TPA directors completed the survey out of a possible 26, making the response rate 58 percent.

For the analysis, airports were identified as either rural or urban based on the county in which they are located. Airports in counties that are 50 percent or more rural, as defined by the U.S. Census Bureau, were considered rural. Airports in counties that are less than 50 percent rural were considered urban. The analysis excluded heliports and seaports since these facilities have limited capacities to handle most air traffic.

### Findings

#### Number of airports

- In 1999, there were 134 public airports in Pennsylvania. Rural areas had 55 airports, or 41 percent of the state total. Urban areas had 79 airports, or 59 percent of the state total.



**PUBLIC AIRPORTS, 1999**  
(Excludes Seaplane Bases & Heliports)

	Rural Areas	Urban Areas	Statewide Total
Scheduled Service (Scheduled commercial flights)	3	13	16
Business Service (Paved runways over 3,500 feet and landing light system)	15	17	32
General Service (All other public access licensed airports)	37	49	86
Total	55	77	134

Source: PA Bureau of Aviation

had only 0.84 public airports for every 100,000 residents.

**Airport use**

- In 2000, the average rural airport had nearly 16,000 operations, or landings and take-offs. This is an average of 43 operations per day. In comparison, the average urban airport had about 47,500 operations, or approximately 130 per day.

- Excluding the two busiest airports in the state (Philadelphia International

- Only three airports in rural areas have regularly scheduled flights: Bradford Regional Airport in McKean County, Dubois-Jefferson County Airport in Jefferson County, and Venango Regional Airport in Venango County. In urban areas, there are 13 airports with regularly scheduled service.

- Regionally, eastern Pennsylvania has nearly twice the number of airports (87) as western Pennsylvania (47).

- According to PennDOT's data, Centre, Montgomery, and York Counties have the most airports per county with six each. Ten Pennsylvania counties do not have any public airports. All but one of these counties is predominantly rural.

- Rural areas have more airports per capita than urban areas. In 1999, rural areas had 2.15 public airports for every 100,000 residents while urban areas

and Pittsburgh International), the average urban airport has twice as many operations as the average rural airport.

- In rural areas, 7 percent of all airport operations occur at scheduled service airports, 50 percent occur at business service airports and 43 percent occur at general service airports.

- In urban areas, 51 percent of all airport operations occur at scheduled service airports, 29 percent occur at business service airports and 20 percent occur at general service airports.

- The majority of rural airports (58 percent) are attended, or open, for eight hours a day or just during daylight hours. More than 18 percent of rural airports are open longer than eight hours a day. Nearly 25 percent of rural airports have irregular hours or are unattended.

**AIRPORT OPERATIONS, 2000**

(Landings & Take-offs)  
(Excludes Seaplane Bases & Heliports)

Total Airport Operations (Daily Avg.)	# of Rural Airports	# of Urban Airports	Statewide Total
Under 5,000 (less than 13 per day)	14	17	31
5,000 to 9,999 (13 to 27 per day)	8	9	17
10,000 to 24,999 (27 to 68 per day)	22	7	29
25,000 to 49,999 (27 to 137 per day)	7	20	27
More than 50,000 (more than 137 per day)	2	19	21
Total*	72	53	125

\*Data not available for 9 airports: 2 rural and 7 urban. Source: PA Bureau of Aviation

- In urban areas, less than half or the airports are attended eight hours a day or during daylight hours. Nearly one-third of the airports are open longer than eight hours a day and a little less than one quarter have irregular hours or are unattended.

**Airport facilities & services**

- For safety and convenience, many airports provide a variety of facilities and services, including everything from lights on the runway to aviation fuel to hanger rentals.

- Rural airports have slightly more airport facilities and services than urban airports. The least available services at both rural and urban airports are repair facilities followed by electronic navigation aides, and aviation fueling facilities.

- Rural airports are more likely to have runway lights than urban airports.

**Visitor facilities & services**

- For the comfort and convenience of pilots, passengers, and visitors, many airports provide amenities such as restrooms, phones, and food service. According to PennDOT’s data, rural airport operators are less likely to have food services than urban airports. Food services include on-site restaurants, snack bars, vending machines, and even nearby restaurants. More than 45 percent of rural airports do not provide any of these food services.

- According to PennDOT’s data, rural airports have fewer nearby hotels or motels than urban airports. However, travelers are more likely to find a restroom in a rural airport than in an urban one. In addition, rural airports are more likely to have a public telephone than urban airports.

**Land transportation to and from the airport**

- In most cases, airports are not located in commercial centers. Once a pilot lands, getting from the airport to his or her final destination requires a car, taxi, or bus. According to PennDOT’s data, many pilots and passengers who land at rural airports have few options. Only two-in-five rural airports have taxi services.

- Car rentals are available at less than 30 percent of rural airports and only 16 percent of rural airports provide courtesy cars. None provide bus service.

<b>TRANSPORTATION SERVICES</b>		
Percent of Rural and Urban Airports <u>WITHOUT</u> Transportation Services (Excludes Seaplane Bases & Heliports)		
Types of Transportation Services	Rural Airports (n=55)	Urban Airports (n=79)
Taxi	61.8%	45.6%
Courtesy Car	83.6%	93.7%
Car Rental	72.7%	57.0%
Bus Service	100.0%	87.3%

Source: PA Bureau of Aviation

**Economic impact of airports**

- According to data from PennDOT’s economic impact study, rural airports generate an estimated 1,650 jobs with a total payroll of about \$31.5 million. By comparison, urban airports generate an estimated 286,500 jobs with a total payroll of about \$5.5 billion.

- When economic factors are combined, rural airports produced \$101.5 million in economic activities, or roughly \$40 per capita. Urban airports produced more than \$12.4 billion in economic activities or about \$1,300 per capita.

- More than 90 percent of the \$12.4 billion in economic activities generated by urban airports came from just five airports with scheduled service. More than 66 percent of the economic output in rural areas came from both general and business service airports.

**Types of Public Airports**

Public airports are licensed by the Pennsylvania Bureau of Aviation and may be used by commercial and private carriers. Carriers may be assessed a fee to operate at public airports.

Three types of public airports are:

✓ **Scheduled Service:** Airports that are accessible to specific commercial carriers, which follow specific schedules.

✓ **Business Service:** Airports that are accessible to commercial or private carriers. These airports must have paved runways that are more than 3,500 feet long and have landing-light systems.

✓ **General Service:** Public access, licensed airports that are neither scheduled service nor business service and have a runway of less than 3,500 feet.

<b>ESTIMATED ECONOMIC IMPACT OF RURAL AND URBAN AIRPORTS, 2000</b> <i>(Excludes Seaplane Bases &amp; Heliports)</i>			
	Total Employment	Total Payroll (\$1,000)	Total Output (\$1,000)
<b>Rural Airports</b>			
Scheduled Service	681	\$13,382	\$33,473
Business Service	640	\$12,597	\$46,075
General Service	325	\$5,512	\$21,982
<b>Rural Airport Total</b>	<b>1,647</b>	<b>\$31,491</b>	<b>\$101,530</b>
<b>Urban Airports</b>			
Scheduled Service	282,280	\$5,437,433	\$11,864,533
Business Service	3,589	\$97,094	\$481,020
General Service	695	\$11,566	\$47,468
<b>Urban Airport Total</b>	<b>286,564</b>	<b>\$5,546,094</b>	<b>\$12,393,020</b>

Source: PA Bureau of Aviation

### **Pilots**

- According to the FAA, in 1998, there were 588,654 active pilots in the United States. Between 1990 and 1998, the total number of pilots declined 12 percent.

- In Pennsylvania, there are just over 18,000 active licensed pilots. Nationally, the Commonwealth ranks ninth in the total number of pilots. California, Texas, and Florida have the most number of pilots – more than 45,000 each - while Vermont, Delaware, and Rhode Island have the least — less than 1,600 each.

- In the states nearest to Pennsylvania, there are almost 79,500 pilots. The majority of these pilots (60 percent) are located in Ohio, New York and New Jersey.

- Among Pennsylvania's 18,000 active pilots, 22 percent are located in rural areas. Regionally within the state, the southeast and southwest have the most pilots while the northwest has the least.

### **Pilot profile**

- According to data collected by the Aircraft Owners and Pilots Association (AOPA), the average pilot in the United States is older, more affluent and better educated than the public at large.

- Of its 341,600 members, more than 95 percent of the pilots in the AOPA are male. The average age of these pilots is 50 years old and 76 percent are married. Their average household income is 2.5 times higher than the national average.

- Almost 90 percent of the member pilots are college-educated and nearly the same percentage hold professional, managerial, or technical job titles.

- Almost half of the member pilots personally own or lease at least one aircraft. On average, these pilots logged 101 hours of flight time during the past 12 months.

### **Tourism promotion and airports**

- According to the informal survey of TPA directors, about 46 percent said that their organization has marketing materials at airports located within their region.

- About 46 percent of directors said that the airport located within their region was a member of the TPA.

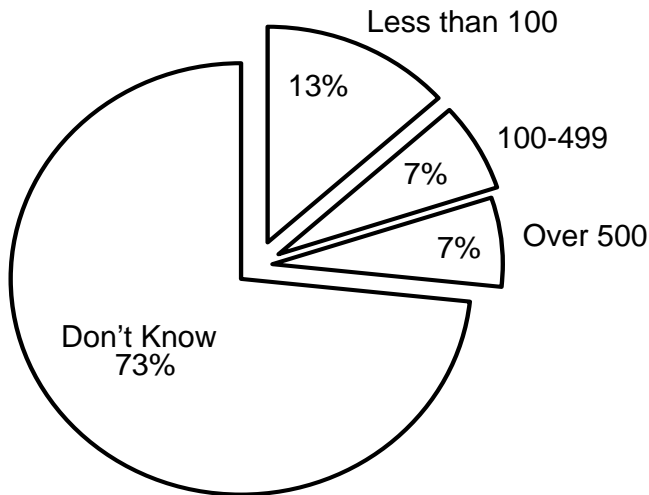
- When asked to estimate how many travelers to the region used the local public airport last year, 73 percent of directors did not know. Among those who were able to make an estimate, half said less than 500 visitors used the local airport.

- How important are airports to tourism within their region? One-fifth of the directors said they were very important. One-third said the airports were moderately important, and another one-fifth said the airports were not important. More than one-quarter of the directors said they were unsure if the airport was important or not.

- Asked if they thought the local airport would play a larger role in tourism promotion over the next five

**ESTIMATED NUMBER OF TRAVELERS TO RURAL AREAS USING LOCAL PUBLIC AIRPORTS, 2000**

(n=15)



Source: Survey of TPA Directors

years, 80 percent of the directors said yes. About 40 percent commented that the airport within their region was about to expand.

**Discussion**

In rural Pennsylvania, aero-tourism has the potential to become an important component of the tourism industry. The key is to get pilots and passengers from

the airport to surrounding areas and specific local attractions so that they might spend more time in these areas.

As discussed above, an airport infrastructure and market already exist. For example, there are 55 public airports scattered across the state's rural areas. In general, these airports have the same safety and physical features found in most urban airports. Also, within eight hours or so of flight time from the state are roughly 61,500 licensed pilots. Within the Commonwealth, there are another 18,000 pilots. This number only includes persons flying the plane. If passengers were included, the number of potential visitors could double.

Although there is no economic impact data specific to aero-tourism, data from AOPA suggests that pilots

are more affluent and adventurous than some other members of the traveling public. From a tourism perspective, this suggests that the average aero-tourist is looking for unique or out of the ordinary experiences from his travels and is willing to pay for them.

While Pennsylvania's rural areas can provide such experiences, the question faced by many tourism promotion organizations may be how to better market the state's amenities to the aero-tourist? Strategies may include placing brochures about local attractions at the airport or sponsoring a specific event.

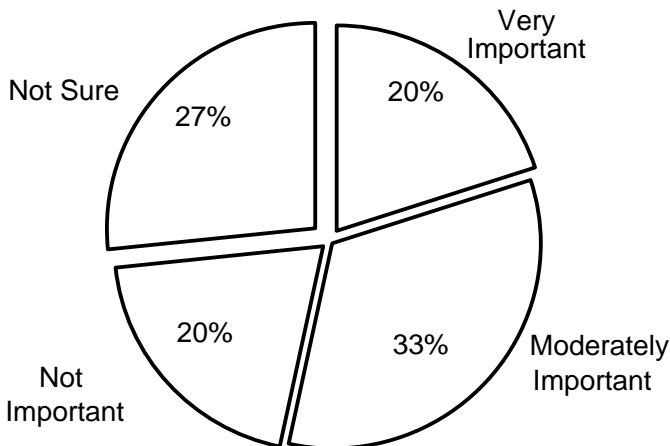
One example of a successful event sponsored in a rural area is the "Sentimental Journey Fly-In." This annual, four-day event, located at the former manufacturing site of Piper Aircraft in Lock Haven, Clinton County, attracts pilots and their families as far away as Montana and Texas. They come to Lock Haven to tour the Aviation Museum and display their airplanes. In 2000, about 500 planes participated in this event. Attendees are encouraged to stay overnight in the area and to spend time exploring the nearby attractions.

**Airport transportation**

Another strategy to consider is something as basic as transportation to and from the airport. According to PennDOT's data, over three-fifths of the rural airports lack taxi service, four-fifths lack courtesy cars, and nearly three-quarters lack car rental services. None of the rural airports reported

**IMPORTANCE OF PUBLIC AIRPORTS TO TOURISM**

(n=15)



Source: Survey of TPA Directors

having bus service. Consequently, most pilots and passengers that fly into rural airports may be trapped there. Without making special arrangement in advance, these individuals cannot visit or shop in the nearby downtown, stay in an historic rustic inn, or visit secluded trout-fishing streams. From a tourism perspective, the inability to get visitors to these types of sites means lost revenue.

One possible reason why these types of transportation facilities are not located in rural airports is low demand. Excluding Philadelphia and Pittsburgh airports, the average urban airport has two-times the number of landings and take-offs as the average rural airport. As a result, rural airport operators are less likely to invest in such amenities if there is little or no demand for such services.

Providing transportation to and from local rural airports is an issue that each TPA may need to assess and address individually.

Developing alternative marketing strategies for airport users is another opportunity for local TPAs to address. According to the informal survey of rural county TPAs, less than half of the directors said that there were any type of marketing materials at their local airport and less than half said that airports were members of their organization. This may suggest that aero-tourism has the potential to grow in many rural areas.

### Conclusion

Aero-tourism may be only a small segment of the entire rural tourism market. However, it has the potential to be an important piece of a larger opportunity. Through effective marketing, aero-tourism has the potential to grow, especially if it is combined with other types of activities such as wildlife viewing, hunting and fishing, and heritage tourism.

For this market to grow, however, more basic services, such as transportation to and from the airports, will be needed and local TPAs will need to develop marketing strategies geared toward the aero-tourist.

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The Center for Rural Pennsylvania is a bipartisan, bicameral legislative agency that serves as a resource for rural policy within the Pennsylvania General Assembly. It was created in 1987 under Act 16, the Rural Revitalization Act, to promote and sustain the vitality of Pennsylvania's rural and small communities. The Center seeks to preserve and enhance the rural environment, which makes the Commonwealth a unique place to live, work, or visit; awards grants for applied research and model projects; maintains and disseminates information on rural trends and conditions; develops publications to share research and project results; and sponsors local, state and national forums on rural issues.



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