



Aviation
Management
Consulting
Group

Aircraft Owner Survey Analysis

Stanislaus County

Crows Landing Airport

February 16, 2006



Aviation Management Consulting Group

February 16, 2006

Mr. Keith Boggs
Deputy Executive Officer/Economic Development
County of Stanislaus
1010 10th Street, Suite 6800
Modesto, CA 95354

RE: Aircraft Owner Survey

Dear Mr. Boggs:

Pursuant to our engagement, this analysis report will convey to you our findings from the Aircraft Owner Survey that we conducted for the Crows Landing Airport (Airport).

The consultant team of Aviation Management Consulting Group and Mead & Hunt were pleased to have been called upon to conduct this survey and provide our analysis regarding the potential market for the Airport. Please contact me if you have any questions about our analysis or the conclusions we have reached.

Sincerely,

Aviation Management Consulting Group

Aviation Management Consulting Group

I. INTRODUCTION	1
II. SURVEY RESPONSES	3
III. CONCLUSIONS	16
ATTACHMENT A - DEFINITIONS	17
ATTACHMENT B - AIRCRAFT OWNER SURVEY	18

I. INTRODUCTION

In an effort to assess the potential user demand for Crows Landing Airport (Airport), Aviation Management Consulting Group (AMCG) and Mead & Hunt developed and facilitated an Aircraft Owner Survey (Survey) of piston, turboprop, and turbojet aircraft owners¹ within a 40 nautical mile radius of the Airport, and turboprop and turbojet aircraft owners within a 75 nautical mile radius of the Airport. A total of 922 postcards were mailed to aircraft owners (690 to piston aircraft owners and 232 to turboprop and turbojet aircraft owners) inviting them to participate in the Survey.

The Survey was made available for completion and submission on a dedicated website created and managed by AMCG. The postcards inviting aircraft owner participation were mailed on January 4, 2006. Hardcopies of the Survey were also made available to aircraft owners upon request. The response deadline for the Survey was January 27, 2006. As an incentive to complete and submit the Survey, each respondent to the Survey was offered the opportunity to be entered into a drawing for the chance to win an aviation gift certificate valued at \$250.

Of the 922 postcards mailed, 76 postcards (8.2%, 64 addressed to piston aircraft owners and 12 addressed to turboprop and turbojet aircraft owners) were returned due to erroneous addresses. This erroneous address rate is not surprising considering the FAA's registration methodology and the frequent changes in some aircraft ownership arrangements. Therefore, the total number of Surveys "received" by aircraft owners equaled 846 (626 piston aircraft owners and 220 turboprop and turbojet aircraft owners)

The Survey, developed by AMCG and Mead & Hunt, was designed to assess the factors that influence aircraft owners within the Airport market on their selection of home (based) airports, and the potential for Survey respondents (aircraft owners) to relocate their aircraft to the Airport. Under the first section of the Survey (Questions 1-22), respondents were asked to rate influencing factors from 1 (unimportant) to 6 (very important). The second section of the Survey allowed respondents to select among various response options to answer questions about their interest level in relocating to the Airport, building a hangar on the Airport, or starting a business on the Airport.

A total of 55 Survey responses were received (54 from piston aircraft owners and only 1 from a turbojet aircraft owner). This equates to a total response rate of 6.5% (8.6% piston aircraft owners and 0.5% turboprop or turbojet aircraft owners) of the total Surveys "received".

A 10% to 20% response rate is generally considered typical for airport related surveys. These surveys typically survey airport users (aircraft owners) that are based at the subject airport and therefore have a vested interest in the outcome of the survey results. Statistically, a 10% to 20% response rate is sufficient to draw reasonable correlation to the other airport users (aircraft owners). However, since the aircraft owners surveyed in this Survey do not have a direct vested interest in the Airport, it is not surprising to see the lower response rate. In fact, in reviewing the FAA's aircraft owners list it appears that there could be numerous financing

¹ Aircraft owners registered with the Federal Aviation Administration.

and leasing companies that “own” turboprop and turbojet aircraft that most likely are not operating the aircraft that they own and therefore would have little to no interest in responding to the Survey.

However, since nearly all respondents were piston aircraft owners, an 8.6% response rate is nearing the lower acceptable response rate level to draw reasonable correlations. However, we would caution the County on extrapolating the results of this survey over the entire population of 626 piston aircraft owners.

Following are some highlights of the 55 survey responses received:

- Aircraft owners own a total of 69 aircraft (64 single engine piston aircraft, four multi-engine piston aircraft, and one turbojet powered aircraft).
- Forty-eight (48) aircraft owners (87%) operate their aircraft solely for non-commercial purposes.
- Zero (0) aircraft owners operate their aircraft solely for commercial purposes only.
- Five (5) aircraft owners (9%) operate their aircraft for both commercial and non-commercial purposes
- Two (2) aircraft owners (4%) did not specify the use of their aircraft.
- Fifty-six (56) aircraft (81%) are based within 40 miles of Crows Landing Airport.

II. SURVEY RESPONSES

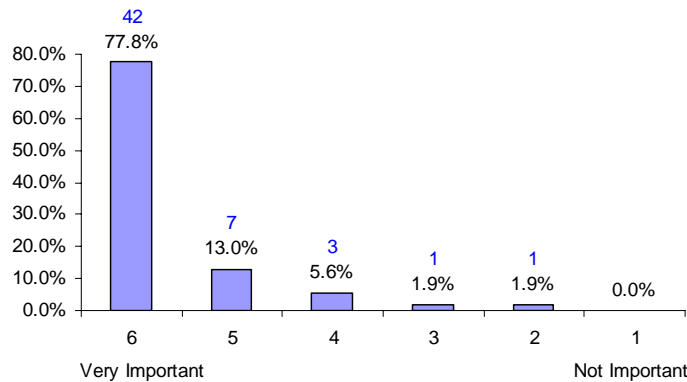
This section provides the statistical results of the Survey responses for each Survey question, an analysis of each result, and additional observations of the Survey results based upon the opinions and experience of AMCG and Mead & Hunt.

There were a total of 30 Survey questions. Respondents also had the opportunity to provide additional comments. Responses from 1 to 3 are deemed to be of “lesser degrees of importance” while responses from 4 to 6 are deemed to be of “higher degrees of importance”. The response analysis and AMCG’s and Mead & Hunt’s comments are as follows:

<p>1. Jet Fuel Available</p> <table border="1"> <thead> <tr> <th>Importance Rating</th> <th>Count</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>6 (Very Important)</td> <td>2</td> <td>6.3%</td> </tr> <tr> <td>5</td> <td>0</td> <td>0.0%</td> </tr> <tr> <td>4</td> <td>3</td> <td>9.4%</td> </tr> <tr> <td>3</td> <td>3</td> <td>9.4%</td> </tr> <tr> <td>2</td> <td>4</td> <td>12.5%</td> </tr> <tr> <td>1 (Not Important)</td> <td>20</td> <td>62.5%</td> </tr> </tbody> </table> <p>Total Respondents: 49 Respondents Not Applicable: 6 (10.9%)</p>	Importance Rating	Count	Percentage	6 (Very Important)	2	6.3%	5	0	0.0%	4	3	9.4%	3	3	9.4%	2	4	12.5%	1 (Not Important)	20	62.5%	<p>Analysis: 84.4% of the respondents rated the availability of jet fuel lesser degrees of importance (1s, 2s, and 3s) when deciding where to base their aircraft.</p> <p>Comments: These results are consistent with the fact that the significant majority of the respondents were owners of piston aircraft.</p>
Importance Rating	Count	Percentage																				
6 (Very Important)	2	6.3%																				
5	0	0.0%																				
4	3	9.4%																				
3	3	9.4%																				
2	4	12.5%																				
1 (Not Important)	20	62.5%																				
<p>2. Avgas Full-Service Available</p> <table border="1"> <thead> <tr> <th>Importance Rating</th> <th>Count</th> <th>Percentage</th> </tr> </thead> <tbody> <tr> <td>6 (Very Important)</td> <td>10</td> <td>19.6%</td> </tr> <tr> <td>5</td> <td>3</td> <td>5.9%</td> </tr> <tr> <td>4</td> <td>6</td> <td>11.8%</td> </tr> <tr> <td>3</td> <td>8</td> <td>15.7%</td> </tr> <tr> <td>2</td> <td>8</td> <td>15.7%</td> </tr> <tr> <td>1 (Not Important)</td> <td>16</td> <td>31.4%</td> </tr> </tbody> </table> <p>Total Respondents: 51 Respondents Not Applicable: 4 (7.3%)</p>	Importance Rating	Count	Percentage	6 (Very Important)	10	19.6%	5	3	5.9%	4	6	11.8%	3	8	15.7%	2	8	15.7%	1 (Not Important)	16	31.4%	<p>Analysis: 62.8% of the respondents rated that the availability of full-service Avgas lesser degrees of importance (1s, 2s, and 3s) when deciding where to base their aircraft. However 37.3% of the responses indicated that full service Avgas higher degrees of importance (4s, 5s, and 6s).</p> <p>Comments: These results are consistent with the fact that, while Avgas availability tends to be an important factor for owners of piston aircraft, full-service avgas is not necessarily essential.</p>
Importance Rating	Count	Percentage																				
6 (Very Important)	10	19.6%																				
5	3	5.9%																				
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1 (Not Important)	16	31.4%																				



3. Avgas Self-Service Available



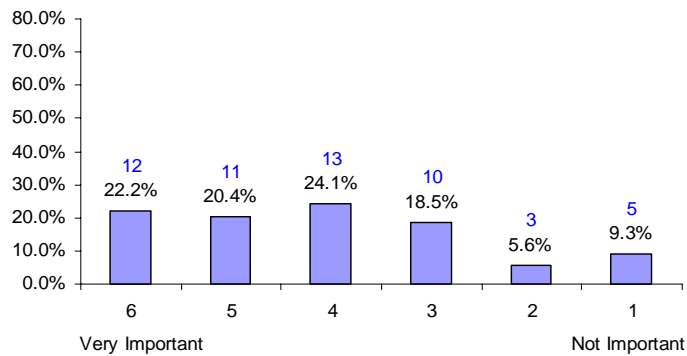
Total Respondents: 54

Respondents Not Applicable: 1 (1.8%)

Analysis: 96.4% of the respondents rated availability of self-service Avgas higher degrees of importance (4s, 5s, and 6s) when deciding where to base their aircraft.

Comments: This is most likely due to the fact that the price of self-service Avgas is generally lower than the price for full-service Avgas and the great majority of piston aircraft owners are price sensitive.

4. Aircraft Maintenance Available



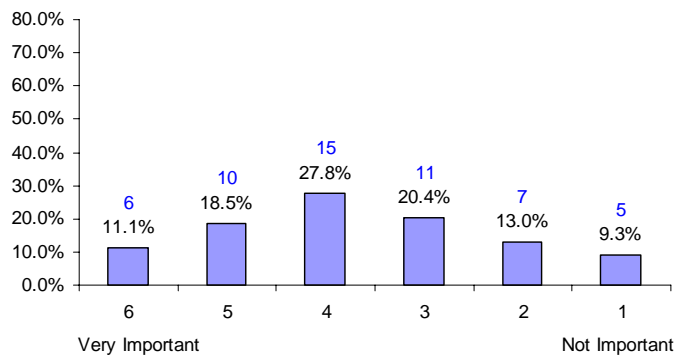
Total Respondents: 54

Respondents Not Applicable: 1 (1.8%)

Analysis: 66.7% of the respondents rated availability of aircraft maintenance higher degrees of importance (4s, 5s, and 6s) when choosing where to base their aircraft.

Comments: Although regular maintenance is required of all aircraft, most small piston aircraft owners have a preferred maintenance provider who may or may not be located at their home (based) airport. Owners of piston aircraft in general are also willing to have maintenance performed on their aircraft at another airport if it is located within a reasonable distance to their home (based) airport.

5. Avionics/Instrument Maintenance Available



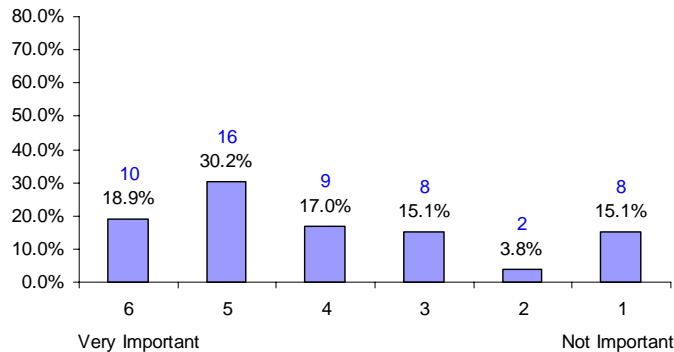
Total Respondents: 54

Respondents Not Applicable: 1 (1.8%)

Analysis: The responses to this question tended to fall towards the middle range or more neutral as Avionics and Instrument maintenance and repair did not seem to be of higher or lower degrees of importance to aircraft owners when deciding where to base their aircraft.

Comments: This is consistent with the responses received regarding aircraft maintenance (Question #4) as owners of piston aircraft tend to be willing to travel to another airport to have these services performed on their aircraft.

6. General Aviation Terminal/FBO



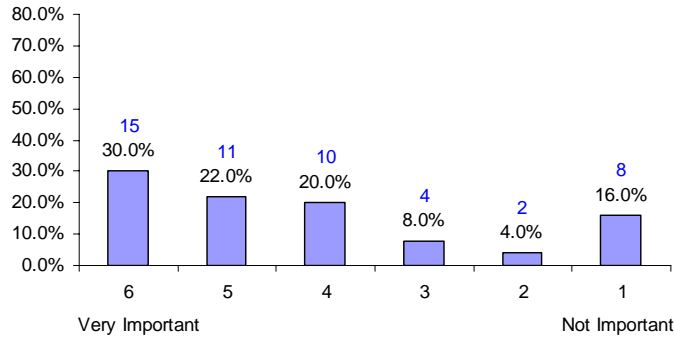
Total Respondents: 53

Respondents Not Applicable: 2 (3.6%)

Analysis: 66.1% of the respondents rated availability of a Fixed Base Operator (FBO) higher degrees of importance (4s, 5s, and 6s) in their decision where to base their aircraft.

Comments: In general, recreational/pleasure aircraft owners rarely use the full suite of amenities offered by FBOs, other than the fuel services and occasional parts/supplies purchases. See Attachment A for a definition of "Fixed Base Operator".

7. Aircraft Tie-Down Availability



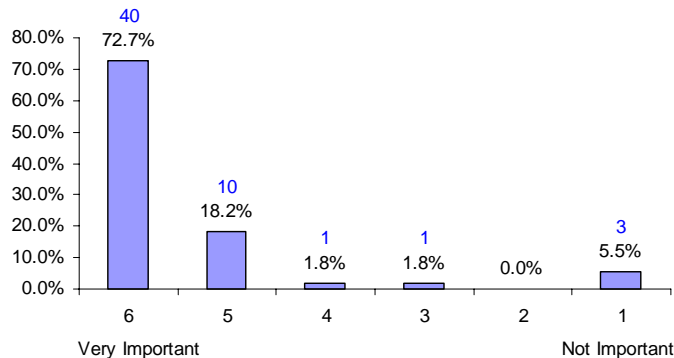
Total Respondents: 51

Respondents Not Applicable: 4 (7.3%)

Analysis: 72.0% of the respondents rated availability of aircraft tie-downs higher degrees of importance (4s, 5s, and 6s) in deciding which airport to base their aircraft at.

Comments: Aircraft tie-downs are generally the least expensive option for aircraft storage at airports and owners of piston aircraft demand tie-down spaces, particularly when hangar space is not available or too expensive.

8. T-Hangar Availability



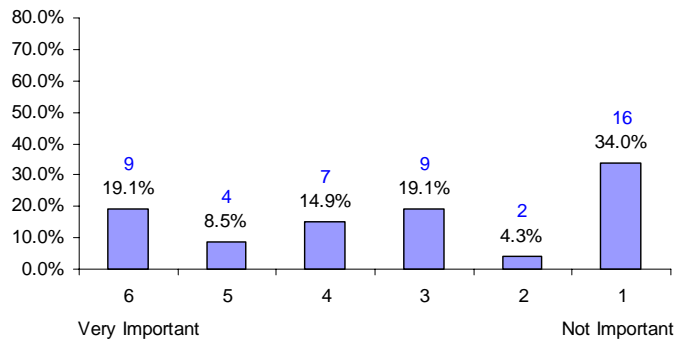
Total Respondents: 55

Respondents Not Applicable: 0

Analysis: 90.9% of the respondents rated T-Hangar availability higher degrees of importance (4s, 5s, and 6s) when choosing a base airport. In fact 72.7% rated T-hangar availability very important (6s).

Comments: Nationwide, there is clear demand by piston aircraft owners for T-Hangars. The Survey responses support that there is a clear demand in the area surrounding Crows Landing Airport for T-Hangars as well. This demand is generated by the balance of affordability, protection, and security for aircraft offered by T-Hangars. See Attachment A for a definition of "T-Hangar".

9. Executive Hangar Availability

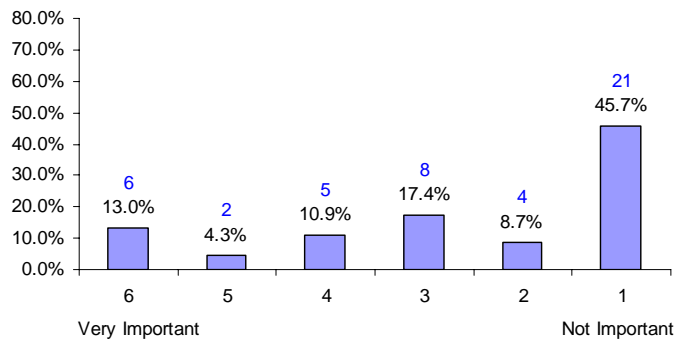


Total Respondents: 51
Respondents Not Applicable: 4 (7.3%)

Analysis: There is no clear preference among the respondents regarding the importance of availability of Executive Hangars as a factor in choosing a home (based) airport. 57.4% rated Executive Hangars lesser degrees of importance (1s, 2s, and 3s) when deciding which airport to base their aircraft at.

Comments: Consistent with national trends, piston aircraft in general demand T-Hangars due to their suitability and affordability. Executive Hangars tend to be larger and more expensive and therefore it would be expected that demand for them would be lower. See Attachment A for a definition of “Executive Hangar”.

10. Corporate Hangar Availability

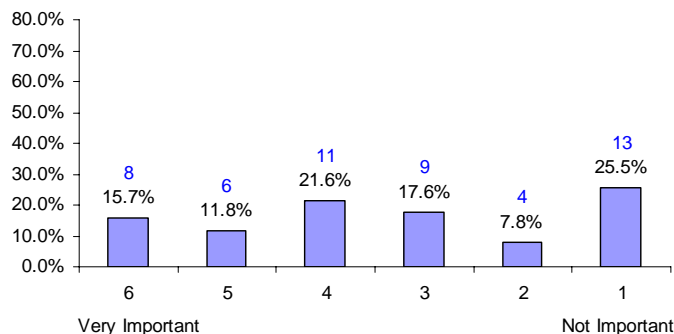


Total Respondents: 50
Respondents Not Applicable: 5 (9.1%)

Analysis: 71.8% of the respondents rated availability of Corporate Hangars lesser degrees of importance (1s, 2s, and 3s) when deciding where to base their aircraft.

Comments: This is consistent with the responses to Question #9, although slightly more towards lesser importance due to the fact that Corporate Hangars are larger and more costly than Executive Hangars and T-Hangars. See Attachment A for a definition of “Corporate Hangar”.

11. Community Hangar Availability

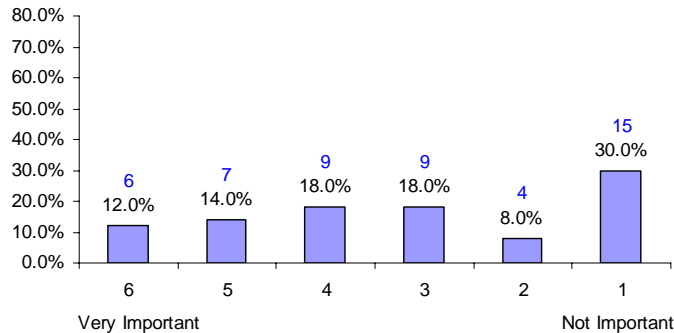


Total Respondents: 51
Respondents Not Applicable: 4 (7.3%)

Analysis: There is no clear preference among the respondents regarding the importance of availability of Community Hangars as a factor in choosing a home (base) airport.

Comments: While community hangars can accommodate several aircraft and the owners can lease floor space within them to park their aircraft, owners of piston aircraft in general prefer T-Hangars in order to have more control of their aircraft (and their domain).

12. Crew Facilities/Amenities Availability

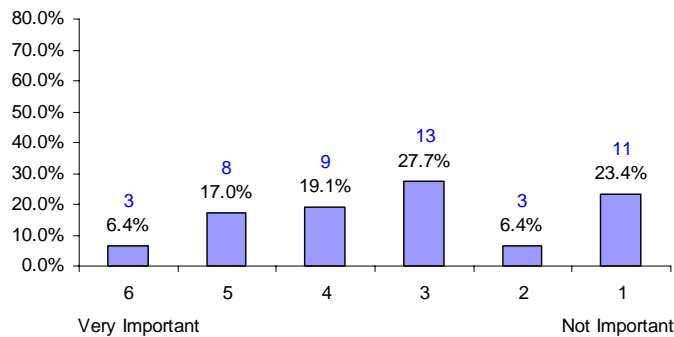


Total Respondents: 51
Respondents Not Applicable: 4 (7.3%)

Analysis: A slight majority (56.0%) of the respondents rated availability of Crew Facilities/Amenities lesser degrees of importance (1s, 2s, and 3s) when choosing where to base their aircraft.

Comments: These responses would be anticipated as the vast majority of non-commercial and piston aircraft owners rarely utilize Crew Facilities/Amenities at their home (based) airport. These facilities are typically utilized by transient aircraft owners and operators.

13. Passenger Facilities/Amenities Availability

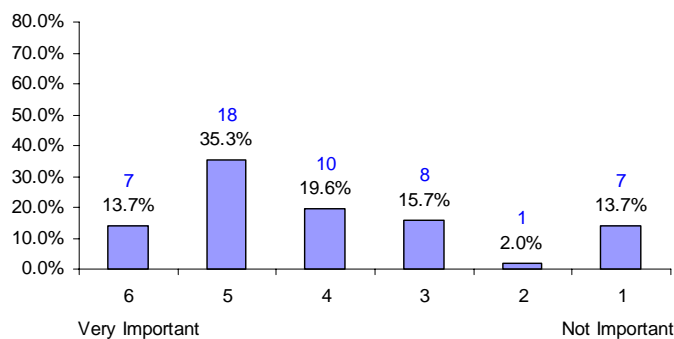


Total Respondents: 49
Respondents Not Applicable: 6 (11.0%)

Analysis: A slight majority (57.5%) of the respondents rated availability of Passenger Facilities/Amenities lesser degrees of importance (1s, 2s, and 3s) when deciding which airport to base their aircraft at.

Comments: These responses would be anticipated as the vast majority of non-commercial and piston aircraft owners rarely utilize Passenger Facilities/Amenities at their home (based) airport. These facilities are typically utilized by transient aircraft owners and operators.

14. Restaurant Availability

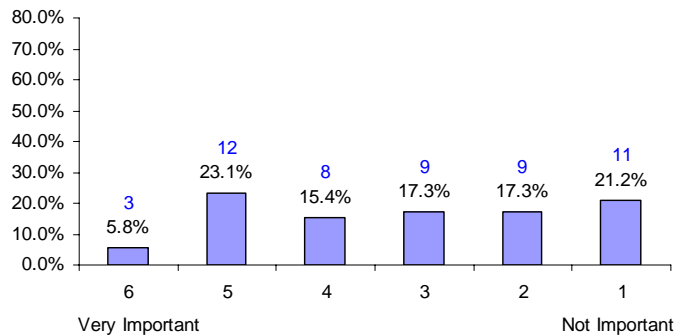


Total Respondents: 52
Respondents Not Applicable: 3 (5.5%)

Analysis: 68.6% of the respondents rated availability of a restaurant higher degrees of importance (4s, 5s, and 6s) when choosing their home (based) airport.

Comments: Airport tenants in general appreciate the convenience of a restaurant on the airport, especially in areas where there are no other nearby restaurants to eat at or fly to.

15. Rental Car Availability

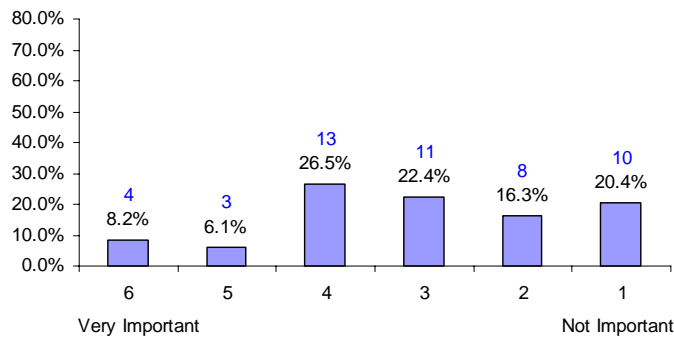


Total Respondents: 53
 Respondents Not Applicable: 2 (3.6%)

Analysis: There is no clear preference among the respondents regarding the importance of rental car availability as a factor in choosing which airport to base their aircraft at.

Comments: Rental cars are a service utilized in large part by transient aircraft owners and operator. Since the vast majority of respondents were non-commercial (recreation/pleasure and business) aircraft owners, it would be expected that their perceived need for rental car availability at their home (based) airport would be low.

16. Ground Transportation Availability

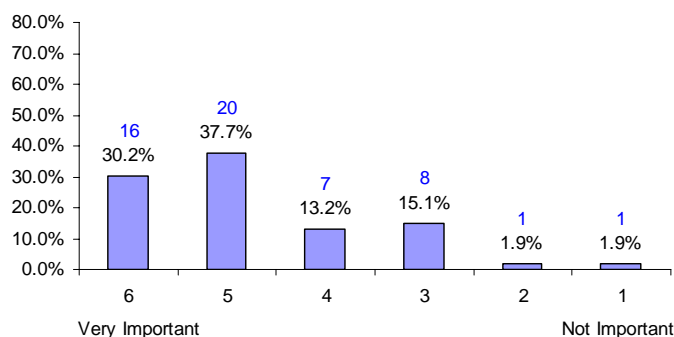


Total Respondents: 51
 Respondents Not Applicable: 4 (7.3%)

Analysis: A slight majority (59.1%) of the respondents rated availability of ground transportation lesser degrees of importance (1s, 2s, and 3s) when choosing a home (based) airport.

Comments: Much like rental cars, ground transportation is a service utilized in large part by transient aircraft owners and operators. Since the vast majority of respondents were non-commercial (recreation/pleasure and business) aircraft owners, it would be expected that their perceived need for supplemental ground transportation at their home (based) airport would be low.

17. Vehicular Parking Availability

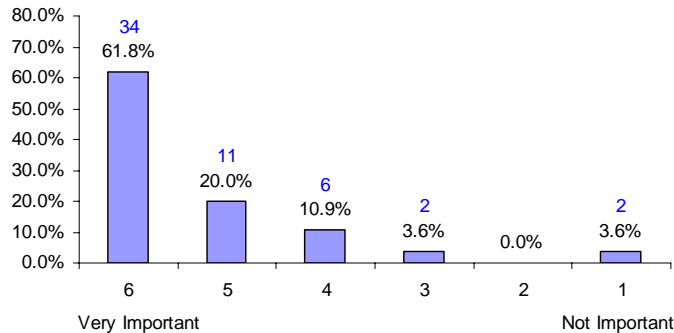


Total Respondents: 53
 Respondents Not Applicable: 2 (3.6%)

Analysis: 81.1% of the respondents rated availability of vehicle parking areas higher degrees of importance (4s, 5s, and 6s) when deciding where to base their aircraft.

Comments: These responses would be anticipated as nearly all tenants (and their passengers) drive to the airport. Parking availability in close proximity to the tenant's facility (tie-down or hangar) also tends to be very important.

18. Airfield Lighting

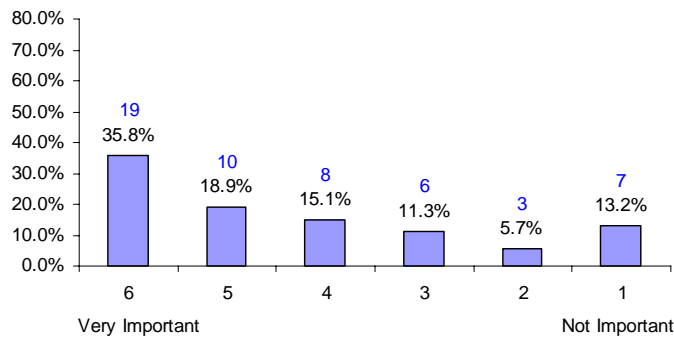


Total Respondents: 55
Respondents Not Applicable: 0

Analysis: 92.7% of the respondents rated airfield lighting higher degrees of importance (4s, 5s, and 6s) when choosing a home (based) airport.

Comments: These responses would be anticipated as runway/taxiway lighting is important for night operations and lighting on and around aircraft and vehicle parking areas (parking lots, tie-downs, and hangars) is very important for security reasons and, again, for conducting activities in and around the aircraft at night.

19. Instrument Approaches

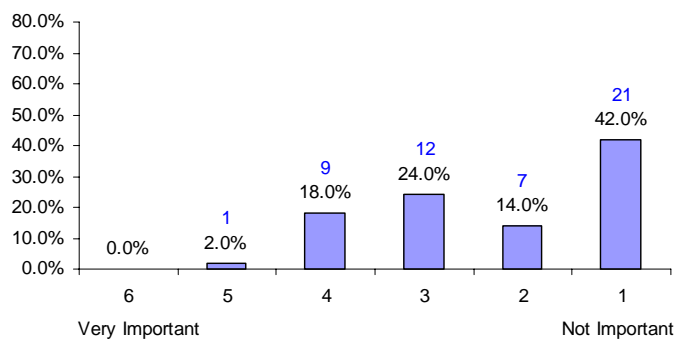


Total Respondents: 54
Respondents Not Applicable: 1 (1.8%)

Analysis: 69.8% of the respondents rated instrument approaches higher degrees of importance (4s, 5s, and 6s) when deciding which airport to base their aircraft at.

Comments: Instrument approaches at an airport allow an aircraft owner to utilize the airport during poor weather conditions and also to conduct training/practice operations under simulated instrument conditions. While not all aircraft owners are capable of conducting activities under instrument conditions, it would be anticipated that the availability of instrument approaches overall would be desired at a home (based) airport and increase the utilization of the airport.

20. Air Traffic Control Tower

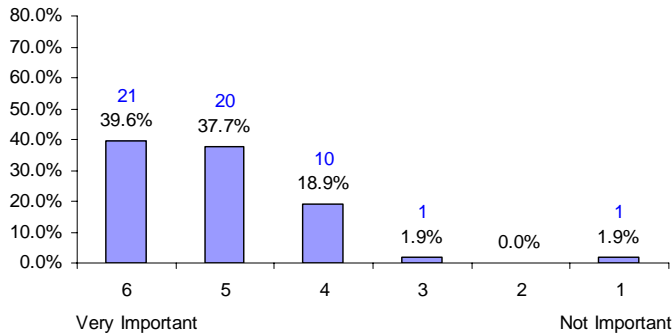


Total Respondents: 52
Respondents Not Applicable: 3 (5.5%)

Analysis: 80.0% of the respondents rated the presence of an Air Traffic Control Tower lesser degrees of importance (1s, 2s, and 3s) when choosing a home (based) airport.

Comments: While an Air Traffic Control Tower provides an added layer of safety for the movement of aircraft in the air and on the ground at an airport, aircraft operating under Visual Flight Rules do not require the services of an Air Traffic Control Tower. This response would be anticipated by owners of small piston aircraft.

21. Roadway Access

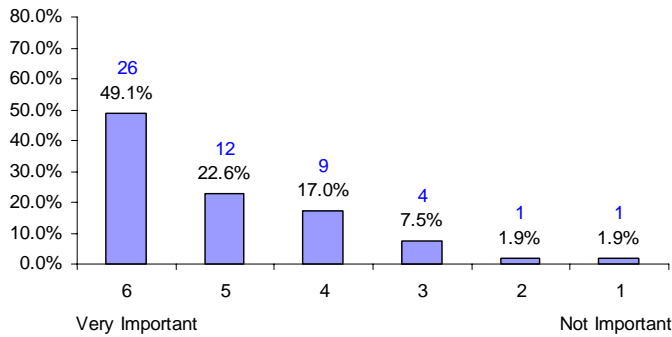


Total Respondents: 53
 Respondents Not Applicable: 2 (3.6%)

Analysis: 96.2% of the respondents rated roadway access to their home (based) airport higher degrees of importance (4s, 5s, and 6s) when deciding where to base their aircraft.

Comments: These responses would be anticipated. If an aircraft is based at an airport, it is important to the owner to have good roadway access to the airport and their aircraft.

22. Security

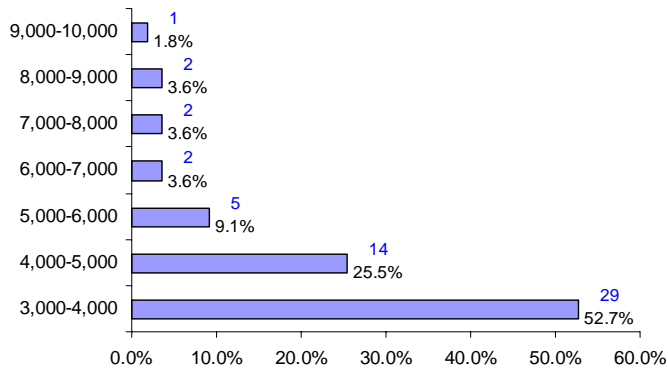


Total Respondents: 53
 Respondents Not Applicable: 2 (1.4%)

Analysis: 88.7% of the respondents rated security higher degrees of importance (4s, 5s, and 6s) when choosing a home (based) airport.

Comments: Security is always a concern for owners of aircraft. While it may not always be of high importance when deciding where to base an aircraft, it does appear to be the case in the local aviation market area of the Airport.

23. Desired Runway Length

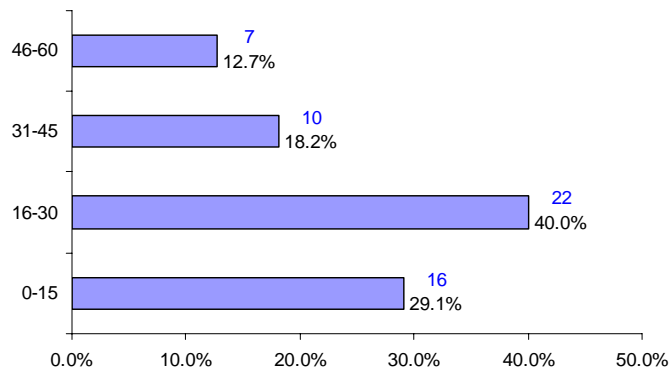


Total Respondents: 55
 Respondents Not Applicable: 0

Analysis: 78.2% of the respondents desire a runway length between 3,000 and 5,000 feet. Only 21.8% desires a runway length greater than 5,000 feet.

Comments: These responses are consistent with the demographics of the respondents whom are primarily small, single engine, piston aircraft. These aircraft generally don't require runways greater than 5,000 feet, particularly at, or near, sea level.

24. Time Willing To Travel (minutes)

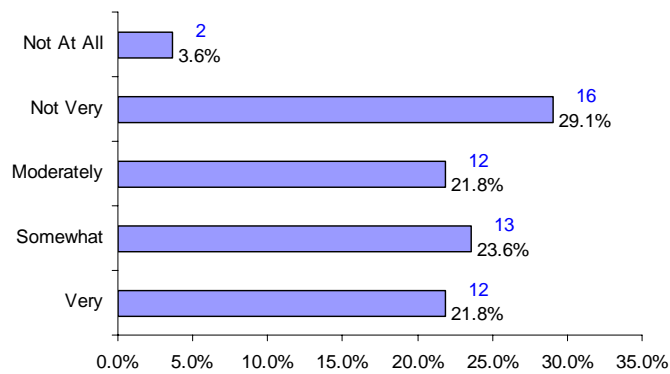


Total Respondents: 55
Respondents Not Applicable: 0

Analysis: 69.1% of the respondents prefer to travel 30 minutes or less to the airport where their aircraft is based.

Comments: This would be anticipated as owners of piston aircraft tend to base their aircraft in close proximity to their homes and/or businesses.

25. Likelihood To Move

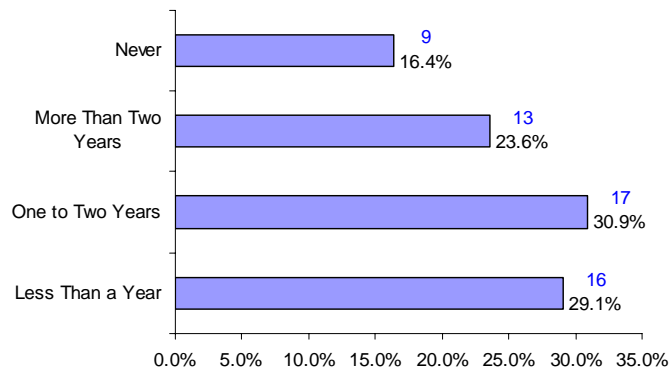


Total Respondents: 55
Respondents Not Applicable: 0

Analysis: 67.2% of the respondents were moderately to very interested in relocating to (basing their aircraft at) Crows Landing Airport.

Comments: This shows considerable interest among area aircraft owners to at least consider relocating to the Crows Landing Airport. Many respondents, however, stated that their likelihood to move was very conditional upon prices of goods and services (per the additional comments received on the Surveys).

26. Timeframe for Possible Move

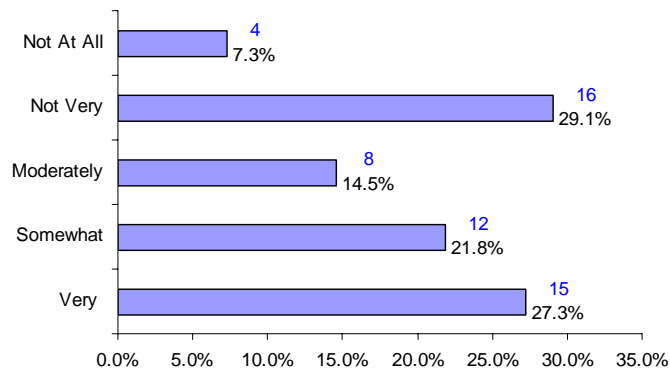


Total Respondents: 55
Respondents Not Applicable: 0

Analysis: 60.0% of the respondents replied that they would be interested in moving to Crows Landing Airport in two years or less.

Comments: Most tiedown agreements and T-Hangar agreements with airports and FBOs typically are month-to-month. The longest agreement that some of the respondents may have would be for one year. Therefore, this supports the ability of 29.1% of respondents to relocate in less than a year and 30.9% in one to two years.

27. Interest In Building A Hangar

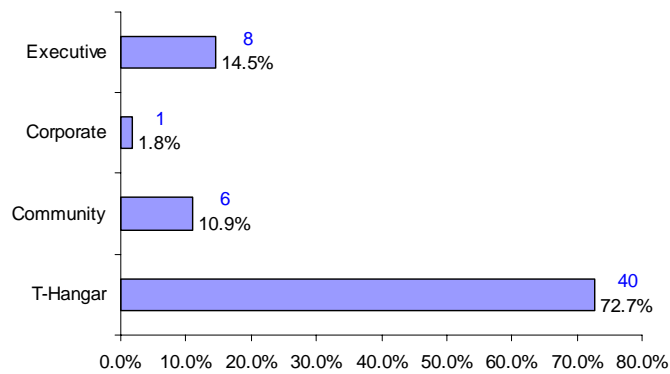


Total Respondents: 55
Respondents Not Applicable: 0

Analysis: 63.6% of the respondents were moderately to very interested in building a hangar at Crows Landing.

Comments: As indicated in Question 8, the respondents have a high degree of interest in hangaring their aircraft. Accordingly, interest is also high in building hangars provided that the costs are in line with the price-sensitive users' expectations.

28. Type Of Hangar

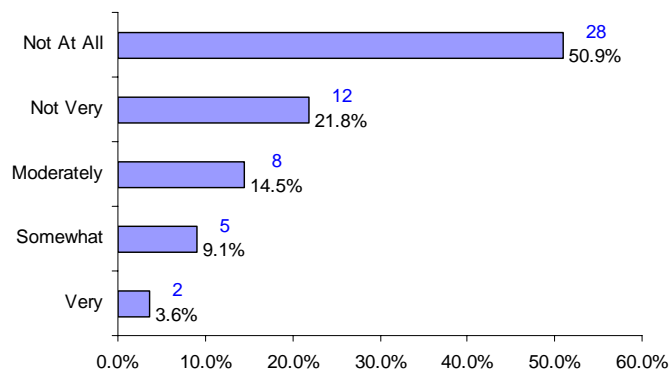


Total Respondents: 55
Respondents Not Applicable: 0

Analysis: 72.7% of the respondents replied that if they were to build a hangar, they would prefer to build a T-Hangar. This is consistent with the responses to Question #8 (availability of T-Hangars).

Comments: Going along with the discussion about T-Hangars in question 8, T-Hangars are the least expensive and offer security and safety as well as any other type of facility.

29. Interest In Starting A Business

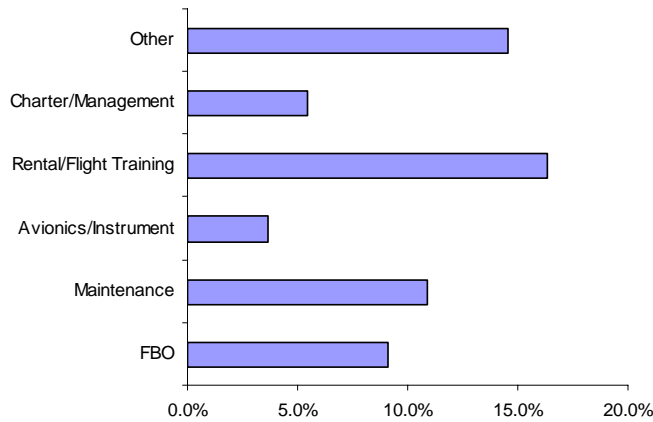


Total Respondents: 55
Respondents Not Applicable: 0

Analysis: 72.7% of the respondents are either not very or not at all interested in starting a business at Crows Landing Airport.

Comments: Lack of interest in starting a business at Crows Landing Airport might be due to the fact that there is currently no general aviation activity at the Airport. In addition, the majority of respondents are operating piston aircraft for non-commercial use (i.e. recreation/pleasure and business).

30. Type Of Business



Total Respondents: 20

Analysis: The majority of respondents indicated that should they consider starting a business at Crows Landing Airport, aircraft rental/flight training and FBO would be the top two types of businesses.

Comments: In addition to fueling services, typically provided by an FBO, aircraft rental/flight training are services most desired at airports throughout the nation.

30. Type Of Business (Other)

Other business types respondents replied that may be of interest were:

- Sail Plane/Banner Tow
- Homebuilt Assembly Facility
- A&P License School
- Auto Fuel Sales
- Aerial Advertising
- Aircraft Parts/Pilot Supplies
- Aircraft Sales
- Storage Hangars

Analysis: Respondents were given an area to input any other type of business which they were potentially interested in starting at Crows Landing Airport that weren't listed as options in the survey. Of the 20 respondents which communicated interest in starting an airport business, these were the other ideas that were presented.

Additional Comments:

1.	It would be nice to have an option. (Jerry Waymire, 209-529-8254, waymerry@sbcglobal.net)
2.	Hangar space is in demand. If it could be leased at a compatible rate your airport will fill at a rapid rate. Please remember that a lot of square footage is unusable in an aircraft hangar and the rates should reflect this. I have an airport 2 miles from my house, South County, but due to the hangar rates I keep my aircraft in Hollister (approximately 25 minute drive). This is due to the hangar rate being one half the cost at Hollister. (Paul Agalotis, 408-683-4751)
3.	I am a retired Airline Captain (age 60 mandatory retirement) currently living within one mile of Crows Landing facility. I have a BS in Aeronautics, and have been active in general aviation all my life (especially in the EAA homebuilt aircraft movement). I always figured that I would get active in using aviation in a program with young people after retirement. Also, I have lately been looking into a flight school in the new Sport Aviation category, and the idea of a homebuilding center or manufacturer assembly facility intrigues me. Matter of fact, I guess I have more ideas then time to complete them, but I do ride my bicycle around the Crows Landing facility and dream/imagine the

	possibilities of it as a needed economic engine for the West side of Stanislaus County. Mostly, I would dearly love to move my aircraft to Crows Landing instead of driving to Byron, which is the closest facility with available hangar. I would seriously consider building hangar facilities on my own at Crows Landing. Such an arrangement was made at Pine Mountain Lake airport with Tuolumne County. I stand ready to assist you in anyway that I can which would help move the Crows Landing facility ahead. Please fell free to contact me at anytime. (John Rowlett 209-892-5648, captjdr@hotmail.com)
4.	My wife is an aerial photographer. Are you interested in having updated photos of the airport and buildings? Let us know. (Andrew Faulkner, 209-526-0875, andrewfaukner@sbcglobal.net)
5.	I do not think we need another airport, or more financial drain on the county. (Ted Gaylord, 209-853-2855, theflyint@yahoo.com)
6.	Tie down and hangar rental costs must be less than Modesto or Oakdale to consider making a move to Crows Landing. I have eight (8) aircraft based at Modesto and Oakdale and I would consider moving them all if the price was right. (Tom Hillier, 209-838-3535 X6, tomhillier@msn.com)
7.	Besides having a great deal of history associated with it, this base would make a great stop over destination for weekend flight to and from the south bay area. Due to its size and location, it would be perfect for fly-ins and sponsored air-shows. I think it would be a great loss for the county and aviation community to continue to let the facility go to waste as it has. (Terry Reeves, 209-551-8623 X304, terry@kkicorp.com)
8.	I hope by my interest in Crows Landing that I will be notified of any information that is distributed to the general aviation community from here on out. This sounds like a wonderful opportunity. (Alonzo Ocaranza, 209-648-3335, aocaranz@us.ibm.net)
9.	Would there be enough land around the airport to build homes and hangars with access to the runways like some county airports in Oregon have? (normanway@comcast.com)
10.	General aviation supports and aids the airport community by its presence and involvement by the pilot/owners. It seems that Crows Landing could support a GA community in addition to whatever other uses it may engender. (Samuel Baker, 209-847-6424, farmdoc@earthlink.net)
11.	I would really like to see Crows Landing open up to general aviation use. I have 2 small airplanes that are based at 2 different airports. I would like to put in my own hanger with a long term ground rent so that both aircraft would be at the same location. Thanks for this survey. (Robert Jorgensen, 209-835-5295, btjorgen@pacbell.net)
12.	It is the perfect location for GA and commercial type operations. It would be great to see the local communities benefit from this resource we have been given. (Paul E. Friedrich, 209-613-0005, flynfarm@msn.com)
13.	Keeping crows landing open and running has been a dream for a long time. Was here many times in US Navy. (J.J. Miller, 209-986-1871, john.j.miller@comcast.net)
14.	If a hanger is available to buy at Crows Landing at a reasonable price then I will consider moving there. (Satya Chahuan, 415-336-7432, satya.chahuan@gmail.com)
15.	It would be great to have Crows Landing available for emergency purposes. Additionally we could always use an FBO if they had reasonable labor rates. (F. Allen Rutledge, 209-383-5111, a.rutledge2@sbcglobal.net)
16.	I would be very interested in building two T-hangars or one square hanger large enough to handle a Cessna 150 & a Piper j-3 Cub if the land lease is within reason. It would be desirable to have electric service metered or otherwise. (Laurence M. Jorgensen, 650-948-5956, viwithlarry@aol.com)

17.	Would be great opportunity for general aviation. Would have to be affordable in order for me to relocate. (Nolan Harris, 209-845-1017, n4631x@sbcglobal.net)
18.	I believe Crow's Landing would be a key instrument for instrument approaches. (Anonymous)
19.	This would be a great addition to the general aviation community. If one were able to establish some sort of "interest - drawing point" (such as a good restaurant) at Crows Landing, it would attract considerable aircraft traffic because pilots are always looking for some good place to fly to for a meal (you have heard of the \$100 hamburger!). With the loss of the Nut Tree restaurant, there is almost no place to fly to in the Valley other than Harris Ranch. I believe that Crows Landing has some great possibilities. (Frederick Mantz, 209-538-3777, fmantz@inreach.com)
20.	Sounds like a neat thing I would love to use this airport. (Curtis Haney, 209-499-6255, curtis@earlydawnbuckhorn.com)
21.	Airports are disappearing at an alarming rate. Once an airport is gone, it is almost impossible to build a new one especially in this county (c'mon admit it.) Stanislaus County is growing like crazy, I can only see us needing more airports rather than less. Coffee and inexpensive fuel (buy the fuel wherever Gustine (3O1) gets theirs) would be a big draw for out of area pilots. Also consider finding a developer to open a golf course on the grounds. This would attract even more fly-in pilots. Consider hosting events such as Golden West EAA fly-in. Consider kicking Sierra Aviation out of Oakdale and forcing them to relocate to Crows Landing with their planes that are too large to safely operate in Oakdale! (Scott Van Artsdalen, 209-578-2350, svanarts@yahoo.com)
22.	The opening of any GA airport is a step forward, after so many closers over the years in this state. (Richard Bettencourt, 209-610-1180, n4632b@sbcglobal.net)
23.	Crows Landing is a long way from much of anything. I doubt that the full potential of the airport could ever be realized due to its location. However, simply opening the airport to the public could easily be justified, many airports in the country are closed every year, having one open would be very positive. The airport is valuable simply as a training reliever airport. (David LeTourneau, 650-218-5895, sonec@msn.com)
24.	Think it would be a great facility for air freight such as FedEx and UPS with its proximity to I-5, the Bay Area and the entire Central Valley. It could also be used by GA serving the rapidly growing communities in Stanislaus County. It would be criminal not to utilize prime aviation property that has room for growth. (Gary Ervin, 209-543-6281, gnpervin@comcast.net)
25.	It would be wonderful to have the airport opened to public use general aviation aircraft. (Shelly Contreras, 209-836-1751, skyscuba@comcast.net)

III. CONCLUSIONS

The following conclusions are based on a combined review and analysis of the Survey responses by AMCG and Mead & Hunt.

The first 21 questions of the Survey assessed the importance of factors which influence the decision of aircraft owners on where to base their aircraft. Within the responses to these questions, there were no surprises. The respondents to the Survey were primarily non-commercial (recreational/pleasure and business) owners of small, piston aircraft who have a rather predictable array of important factors, including fuel availability and price, aircraft storage availability and price, roadway access, vehicle parking availability, and basic airfield components such as lighting.

The last nine questions allowed the respondents to choose options regarding their interest level in relocating their aircraft to Crows Landing Airport, building a facility at the Airport, and establishing a business at the Airport. Of the responses received, there seemed to be a relatively high amount of interest in relocating to Crows Landing Airport and establishing facilities or businesses there. According to the additional testimonial comments, this interest was in large part conditional on price of products/services/facilities offered at the Airport. This is to be expected when considering that the vast majority of the respondents were non-commercial (recreational/pleasure and business) aircraft owners and operators who are typically very price sensitive.

Based upon the findings of this survey (in particular, Question # 25) AMCG and Mead & Hunt believe it is reasonable to project that approximately 15 to 20 aircraft may relocate to Crow's Landing Airport within the first year of the Airport's operation as a public use airport. Additional aircraft, primarily small, piston aircraft, may relocate to the Airport in subsequent years, as services and facilities at the Airport are further developed.

DEFINITIONS

Fixed Base Operator:

A Fixed Base Operator (FBO) is a commercial operator typically engaged in the sale of products, services, and facilities at the Airport including aircraft fuels and lubricants (Jet Fuel, Avgas, and aircraft lubricants) and one or more of the following: passenger, crew, and aircraft ground services, support, and amenities; aircraft maintenance; and tiedown, hangar, aircraft parking, office, and shop.

T-Hangar:

An individual hangar which typically has the capacity of storing only one aircraft (usually not larger than a cabin class multi-engine aircraft). The hangar derives its name from its shape (in the form of a “T”) which increases the efficiency of the design so as to accommodate the wing span and the tail section of an aircraft. T-Hangars may be individual (stand alone) structures or they may be combined and “nested” so that the tail sections of the “T” configuration interlock to form a single linear structure.

Executive Hangar:

A square or rectangular-shaped hangar which may stand-alone or be connected to other structures (e.g., other executive hangars, lean-to structures, or FBO terminal buildings). Executive hangars, which are designed primarily to accommodate the “proprietary” aircraft operations of a single company or individual who may or may not service (and stage) their own aircraft. Executive hangars are typically larger than T-Hangars (range in size from 50 feet by 50 feet to upwards of 100 feet by 100 feet) but smaller than most corporate hangars. In many cases, office, shop, and/or storage space is located within the structure.

Corporate Hangar:

A square or rectangular-shaped hangar which is designed to accommodate the “proprietary” aircraft operations of a single company who typically services (and stages) its own aircraft. Corporate hangars, which typically stand alone, are usually larger than executive hangars (may span upwards of 200 feet by 200 feet) and in many cases, they have an attached lean-to structure which houses shop, office, and storage areas.

Community Hangar:

A square or rectangular-shaped hangar which is typically connected to other facilities (primarily to lean-to structures and/or FBO terminal buildings). Community hangars, which typically range in size from 75 feet by 75 feet to upwards of 100,000 square feet per building, are typically the largest hangar located at an FBO. Community hangars are typically utilized to accommodate multiple aircraft of various sizes and configurations which are owned by more than one company or individual and are typically serviced by the FBO.

AIRCRAFT OWNER SURVEY



Aircraft Owner Survey

Stanislaus County (County) is evaluating the feasibility of opening Crows Landing Airport as a public-use, general aviation airport. As an active aircraft owner, your input is important to the County in making its decision.

Crows Landing Airport (a former Navy/NASA facility) is located 17 statute miles southwest of Modesto and one mile east of I-5, between the City of Patterson and the community of Crows Landing. The Airport has two concrete runways (approximately 7,000 and 8,000 feet long).

All participants who fully complete and submit this survey will be eligible to win a \$250 gift certificate to Sporty's Pilot Shop or Chief Aircraft, Inc. Please submit only one survey per aircraft owner. Thank you in advance for your cooperation. Your input will be very valuable to this assessment.

Type of aircraft you own: 1 2 3

Aircraft where aircraft are based: (3 letter FAA Identifier):

Are your aircraft operated: Commercially Non-Commercially Both

Base Airport Selection

Please rate the following factors based on their importance if you were to relocate your aircraft to another airport such as Crows Landing Airport. (6 being very important, 1 being not important at all)

	6 Very Important	5 -----	4 -----	3 -----	2 -----	1 Not Important	N/A
→ Jet A Fuel Full Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
→ Avgas Fuel Full Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
→ Avgas Fuel Self Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
→ Aircraft Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
→ Avionics/Instrument Maintenance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
→ General Aviation Terminal/FBO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
→ Aircraft Storage (Tiedown)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
→ Aircraft Storage (T-Hangars)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
→ Aircraft Storage (Executive Hangar)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
→ Aircraft Storage (Corporate Hangar)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



→ Aircraft Storage (Community Hangar)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
→ Crew Facilities/Amenities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
→ Passenger Facilities/Amenities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
→ Restaurant/Coffee Shop	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
→ Rental Car Availability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
→ Ground Transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
→ Vehicle Parking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
→ Airfield Lighting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
→ Instrument Approaches	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
→ ATC Tower	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
→ Roadway Access	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
→ Security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

→ What is your desired runway length in feet?

→ How far are you willing to drive to the airport at which your aircraft is based in miles?

→ If the products/services/facilities/other factors rated as most important (4 and above) were offered at Crows Landing Airport, how likely would you be to move your aircraft there?

(Please enter: "Very", "Somewhat", "Moderately", "Not Very", or "Not at All")

→ How soon would you be interested in moving your aircraft to Crows Landing Airport?
(Please enter: "Less than 1 Year", "1-2 Years", "More than 2 Years", or "Never")

→ How interested would you be in building a hangar at Crows Landing Airport?
(Please enter: "Very", "Somewhat", "Moderately", "Not Very", or "Not at All")

→ If interested, what type?
(Please enter: "T-Hangar", "Community", "Executive", or "Commercial")

→ How interested would you be in establishing a commercial aviation business at Crows Landing Airport?
(Please enter: "Very", "Somewhat", "Moderately", "Not Very", or "Not at All")



➔ Which type of business would you be interested in establishing? (Please check all that apply)

Fixed Base Operator (FBO):

Full Service FBO

Specialized Aviation Service Operator (SASO):

Aircraft Maintenance Business

Avionics/Instrument Repair Business

Aircraft Rental/Flight Training Business

Aircraft Charter/Aircraft Management Business

Other Please Describe:

Additional Comments/Suggestions

➔ Please provide any other comments and/or suggestions you have regarding the opening of Crows Landing Airport as a public-use, general aviation facility.

If you would like to be eligible for the \$250 gift certificate, please enter contact information below.

Name

Phone Number

E-mail

If you have any questions regarding or problems completing this survey, please contact Jeremy Sickler at (303)792-2700, or jsickler@aviationmanagement.com

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Greenwood Village, CO 80111**