

1. The Aviation Industry Cluster

- a. An Overview of the US Aviation Industry Cluster, recent trends and post-Covid 19 outlook
- b. Industries in the Aviation Industry Cluster
- c. Employment multipliers for the Aviation Cluster
- d. An industry linkage comparison of the Aviation Cluster in Zephyrhills, Tampa Bay Area and Florida (this will identify the key sub-industry suppliers the City might be interested in recruiting)

2. Existing Conditions: Land Analysis

- e. Available industrial acreage
- f. Mix of uses inside/outside the fence
- g. Study Area development constraints

3. Build-Out and Visualization

- h. Space requirements for different levels of Aerospace Cluster development
- i. Visualizations (the number of visualizations will be at TBRPC's discretion but will be sufficient to portray different buildouts of the aviation cluster in Zephyrhills)

4. Summary and Recommendations

Here are some constraints on the project:

- Project will begin August 3 and will conclude by end of November 2020. We will provide a PDF file of the complete report to the City. Any printed copies will be at the City's or other interested parties' expense.
- We will not investigate infrastructure constraints (added trips to road network, utilities impacts, etc.) for existing conditions or any of the visualizations but will be happy to include an analysis of those things should the City provide that information.
- We will present our draft findings to the Economic Summit as a slideshow in October and 1 presentation on the final report to the City Council in November, if you request it, summarizing our findings.
- Those delivery dates are feasible, but TBRPC may need fairly quick turnaround on data requests in order to deliver on time.
- As a public document, TBRPC reserves the right to use the study on the TBRPC website and to help spread awareness of the Council's Economic Analysis Program.

Thank you. Hope this works,

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