

Economic Contribution of North Carolina Airports

FINAL REPORT

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16. Abstract <p>This study of the economic contribution of airports to their communities includes the 72 publicly-owned airports in North Carolina, including nine which offer scheduled, commercial air service. Airports provide a vital link to regional, national, and international markets to many businesses in North Carolina. A portion of the revenues generated by these local businesses can be attributed to the provision of access to the markets they serve. The economic contribution results are presented in three categories: direct, indirect, and induced impacts. The indirect and induced impacts capture multiplier impacts. Direct impacts result from firms that are directly engaged in the movement of people or goods through an airport. Indirect impacts represent the impacts of spending by airport-related firms on products and services provided by support businesses (such as office supply companies, property maintenance, etc.). Induced impacts result from payroll expenditures of employees of directly- and indirectly-related firms that produce successive spending (which is money that is re-circulated in an economy resulting in additional economic activity). The direct contributions for general aviation airports came from surveys of airport management, tenants, and major users; while the direct contributions for commercial airports were derived from operations at the airports. IMPLAN® (IMPact Analysis for PLANning) multipliers (from the Minnesota IMPLAN® Group) were used to generate the indirect and induced contributions of the airport activity, which was also utilized for the tax analysis.</p> <p>The total economic output contribution of North Carolina's publicly-owned airports is approximately \$25.9 billion while supporting over 108,000 jobs. As evident by these numbers, aviation is clearly a significant contributor to the economic viability of the state. As a frame of reference for the magnitude of the airports' contribution to the state's economy, the contribution represents six percent of the state's GDP. North Carolina airports supported \$4.0 billion in labor income for North Carolina workers. State and local governments in North Carolina received \$772 million in sales, property, corporate, and personal tax collections in 2010 due to activity supported by North Carolina's publicly-owned airports. The local property tax related to airport activities is \$277 million. The activity supported by the airports resulted in \$371 million in business sales tax collections across the state and \$115 million in state corporate and personal tax revenue. An estimated \$8 million in property taxes from based aircraft are collected by local governments.</p>			
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Without the help of all the above individuals, this project could not have been completed.

EXECUTIVE SUMMARY

This study of the economic contribution of airports to their communities includes the 72 publicly-owned airports in North Carolina, including nine which offer scheduled, commercial air service. Airports provide a vital link to regional, national, and international markets to many businesses in North Carolina. A portion of the revenues generated by these local businesses can be attributed to the provision of access to the markets they serve.

The economic contribution results are presented in three categories: direct, indirect, and induced impacts. The indirect and induced impacts capture multiplier impacts. Direct impacts result from firms that are directly engaged in the movement of people or goods through an airport. Indirect impacts represent the impacts of spending by airport-related firms on products and services provided by support businesses (such as office supply companies, property maintenance, etc.). Induced impacts result from payroll expenditures of employees of directly- and indirectly-related firms that produce successive spending (which is money that is re-circulated in an economy resulting in additional economic activity). The direct contributions for general aviation airports came from surveys of airport management, tenants, and major users; while the direct contributions for commercial airports were derived from operations at the airports. IMPLAN® (IMpact Analysis for PLANning) multipliers (from the Minnesota IMPLAN® Group) were used to generate the indirect and induced contributions of the airport activity, which was also utilized for the tax analysis.

The total economic output contribution of North Carolina's publicly-owned airports is **approximately \$25.9 billion while supporting over 108,000 jobs**. As evident by these numbers, aviation is clearly a significant contributor to the economic viability of the state. As a frame of reference for the magnitude of the airports' contribution to the state's economy, **the contribution represents six percent of the state's GDP**. North Carolina airports supported \$4.0 billion in labor income for North Carolina workers. State and local governments in North Carolina received \$772 million in sales, property, corporate, and personal tax collections in 2010 due to activity supported by North Carolina's publicly-owned airports. The local property tax related to airport activities is \$277 million. The activity supported by the airports resulted in \$371 million in business sales tax collections across the state and \$115 million in state corporate and personal tax revenue. An estimated \$8 million in property taxes from based aircraft are collected by local governments.

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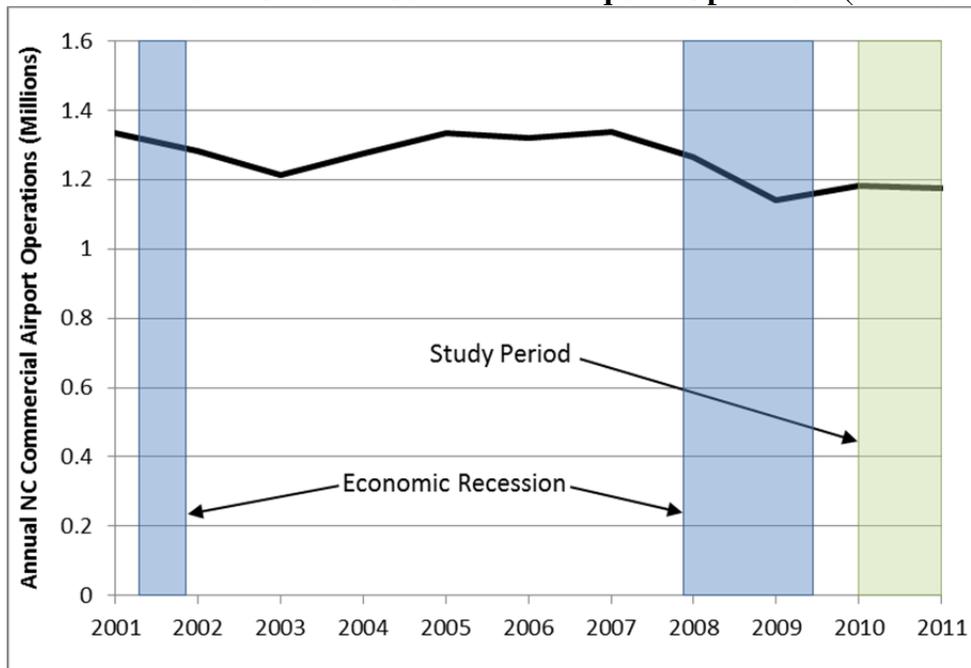
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INTRODUCTION

The North Carolina Department of Transportation’s Division of Aviation has responsibility across the state for aviation functions including system planning, airport and aviation system development, and funding. This study of the economic contribution of airports to their communities includes the 72 publicly-owned airports in North Carolina which are part of the National Plan of Integrated Airport Systems (NPIAS), including nine which offer scheduled, commercial air service. Previous, similar statewide studies were conducted in 1996 and 2006. The purpose of this project is to examine and report the current economic contributions of aviation services for the publicly-owned airports in North Carolina, both on the statewide and the local, county levels. Economic indicator studies are referred to by several names ranging from economic impact, benefit, cost-benefit, and contribution studies. For the purposes of this study, the project team will refer to the overall study of the existing airports as an economic contribution study, which will measure the economic activity associated with the airports in the current regional economy. A thorough understanding of the contribution of aviation activities is important when considering funding decisions at local and statewide levels.

The economic contribution of airports will change over time, just as the number of commercial airport operations in North Carolina changes over time as shown in Exhibit 1. In a similar fashion, the operations at general aviation airports fluctuate due to increases and decreases in demand for air service for various reasons. Overall economic conditions can impact the demand for air service, as indicated by the two economic recessions over the past decade (NBER 2011). Changes in airport usage by visitors, businesses, types of businesses, frequency of trips, and the amount and type of cargo should be considered when examining the results presented in this study, as the former will change the economic contribution of the airports over time.

Exhibit 1 – North Carolina Commercial Airports Operations (2001 to 2011)



Source: FAA Air Traffic Activity System (ATADS) 2011, NBER 2011

PROBLEM STATEMENT

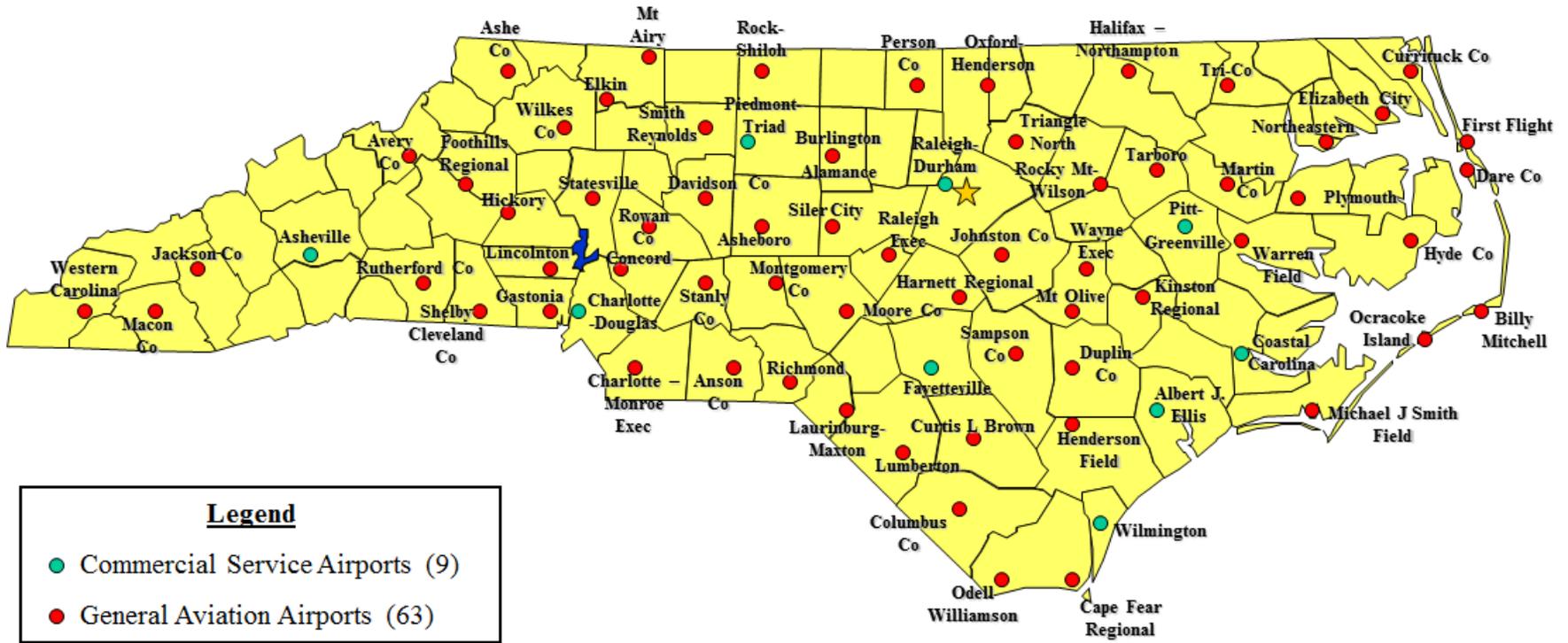
The North Carolina Department of Transportation (NCDOT) Division of Aviation wanted to understand the economic contribution of aviation services for the 72 publicly-owned airports in North Carolina (Exhibit 2). The purpose of this project was to examine and report the economic contribution of airport services for the publicly-owned airports in North Carolina, at both a local and statewide level. The results of the study are documented in this technical report for use by the Division of Aviation and airport managers and operators. The Division of Aviation and local airports could use these results to show the existing as well as the future potential contribution of airport activities to various audiences such as the North Carolina General Assembly, the North Carolina Department of Transportation Board of Transportation, other municipal and elected officials, and businesses and industries located in North Carolina, as well as businesses and industries that could potentially locate in North Carolina. This study has a couple of notable differences from the previous study in the calculation of visitor impacts and commercial airport contribution calculations, as documented in this report. Both of these changes were modified as a result of guidance from the FAA including updated default values for visitor expenditures and a commercial airport methodology based on contributions from commercial airline, air cargo, and airport operations, instead of the previously applied survey-based method. The 2006 study found an estimated 88,420 jobs and \$11.81 billion in economic contribution per year were supported North Carolina airports – 14,970 jobs and \$1.88 billion at general aviation airports and 73,450 jobs and \$9.93 billion at commercial airports.

ECONOMIC CONTRIBUTION DEFINITIONS

Numerous terms and concepts will appear throughout this report, specific to economic contribution studies and airport activity. The following information will provide readers with a foundation for understanding the results presented in this report. To measure the contribution of the airports to North Carolina's economy, four metrics were used: output (gross revenue), the number of payroll employees and self-employed workers, employee compensation (payrolls and self-employment income), and tax receipts of state and local governments. The economic contribution results are presented in three categories: direct, indirect, and induced contributions.

- Direct contributions result from airport staff and on-site companies that are directly engaged in airport operations or aviation services, which can include manufacturing, shipping, receiving, exporting, distributing, transporting, handling, or processing people and goods which move through an airport, including employees engaged in these activities and personnel employed by an airport.
- Indirect contributions represent the impacts of spending by airport-related firms on products and services provided by support businesses (such as office supply companies, property maintenance, etc.).
- Induced contributions result from payroll expenditures of employees of directly- and indirectly-related firms that produce successive spending (which is money that is re-circulated in an economy resulting in additional economic activity).

Exhibit 2 – North Carolina Airports



METHODOLOGY

INTRODUCTION

Airports provide a vital link to regional, national, and international markets for many businesses in North Carolina. A portion of the revenues generated by these local businesses can be attributed to the provision of access to the markets they serve. These revenues support employees as they provide goods or services to clients. Subsequently, the employees spend their salaries in the local economy on housing, food, household items, entertainment, services, etc. Airports enable companies reach well beyond their immediate geographic area to obtain work that would not be as easy to secure without the use of a flight. Consequently, airports are a contributor to North Carolina's economic vitality. The following methodology is an attempt to quantify the amount and type of these economic contributions at North Carolina airports. The broad study approach was to measure the outputs of business activities supported by the movement of goods and people via North Carolina's publicly-owned airports.

The findings from studying the economic contributions of North Carolina's publicly-owned airports include total (direct, indirect, and induced) contributions to economic output, jobs, and labor income. The direct contributions for general aviation airports came from surveys of airport management, tenants, and major users, while the direct contributions for commercial airports were derived from operations at the airports. IMPLAN® (Impact Analysis for PLANning) multipliers (from the Minnesota IMPLAN® Group) were used to generate the indirect and induced contributions of the airport activity, and these multipliers were also used for the tax analysis.

DIRECT CONTRIBUTIONS FOR GENERAL AVIATION AIRPORTS

The primary source of data for general aviation airports came from surveys completed by airport management, tenants at the airport, and major users. The initial set of surveys was sent to airport management and asked about the number of based-aircraft, aircraft operations, jobs, airport tenants, and major airport users. The next step in the data collection was to contact each of the tenants at the airport and major users of the airport through contact information acquired through the airport manager's survey. The tenant and major user survey asked questions on topics including: use of the airport, type of business, and number of employees. Through repeated phone calls and emails, the team desired to achieve a 100 percent response rate from airport management, tenants, and major users. However, as with most surveys, complete participation was not achieved. The team decided that only collected or documented information would be input into the model. Any business users not reporting survey information would be excluded from the study. If a tenant did not respond to the survey, information from airport management about airport tenant employment was used when available. Thus, no extrapolation techniques were used to expand data for missing information. This is a conservative approach, but one that is highly repeatable over time. The individual contribution of any airport can be updated in a short period of time if additional data becomes available from existing or new tenants or business users. Employment data at each business was the measure of economic activity. The direct contribution employment value was calculated by multiplying the employment of each business by the proportion of their business that they would attribute to the existence of this airport. This proportion was used by the

project team to separate the economic contribution due to aviation from the contribution due to other sources.

DIRECT CONTRIBUTIONS FOR COMMERCIAL AIRPORTS

Similar to the survey method for general aviation airports, airport management, tenants, and major users at commercial (scheduled air carrier) airports were surveyed. However, due to the far-reaching impacts of commercial airports into surrounding communities and the difficulty of obtaining a complete listing of major users, an alternative analysis procedure developed by the FAA (2011) was applied to the commercial airports with more than 50,000 enplanements in 2010. Therefore, the following methodology was applied to CLT, RDU, GSO, ILM, AVL, FAY, OAJ, EWN, and PGV. This methodology includes three operations which generate economic activity: commercial airline, air cargo, and airport operations. Commercial airline operations were measured by expenditures on airline and air commuter services, including passenger airline ticket revenues (BTS Form 41 Schedule P 1.2 and Schedule P 1.1). Airport operations were measured by expenses incurred by each airport authority on operation and project expenditures (FAA AAS-400, CATS, Report 127). Air cargo operations were measured by air cargo shipments (FAA ACAIS).

VISITOR CONTRIBUTIONS

Airports serve the transportation needs of many visitors to an area. Visitors spend money for taxis, hotels, meals, entertainment, etc. These expenditures in turn support local jobs and are an important component as input into the economic contribution calculations. The visitors to the airport were calculated using FAA methodology (FAA 2011) based on the number of operations included in the FAA 5010 data. The 5010 data were reviewed and in some cases, revised by the airport management at the individual airports. The types of operations include: air carrier, regional carrier, air taxi, general aviation local, general aviation itinerant, and military. For general aviation operations, only air taxi and general aviation itinerant trips are assumed to generate visitors. Half of the operations were assumed to arrive at each airport (with the other half departing the airport), while 40% of the aircraft were expected to carry overnight passengers with an average of 2.84 passengers staying two nights with an average expenditure of \$98 per day. Airports that offer commercial service also have significant visitor impacts. The number of visitors for commercial airports was calculated based on the percentage of visitors and the number of deplanements, excluding internal transfers, at the airport. This takes into account the users of an airport who are local residents returning from trips to other locations. The \$1,024 value used for expenditures per visitor was based on FAA defaults (FAA 2011).

MULTIPLIER EFFECTS

IMPLAN® (Impact Analysis for PLANning) multipliers (from the Minnesota IMPLAN® Group) were used to generate the indirect and induced contributions of the airport activity, which was also utilized for the tax analysis. IMPLAN® uses data compiled from a wide variety of sources, including unique local data and census information, not estimated from national averages (MIG 2010). IMPLAN® is widely used by analysts in helping to calculate the economic contribution of airports and other transportation facilities. The indirect contributions represent spending by airport-related firms on goods and services provided by support businesses (such as office supply companies, property maintenance, etc.). The induced contributions result from payroll expenditures by employees of directly- and indirectly-related

firms that produce successive spending. Total contributions were generated by modeling each airport's contributions.

The project team developed a separate model within IMPLAN® for each airport to take into consideration the surrounding local economy. Each airport was analyzed on a county-level basis, which includes the county in which it is located and other adjacent influenced counties if applicable, as shown in Appendix A. The county influence areas were selected based on geographic location, metropolitan and micropolitan statistical areas, and knowledge by NCDOT Division of Aviation staff about employment and travel patterns.

TAX CONTRIBUTIONS

Along with economic contributions, the project team considered the tax revenues that are generated by the airports through IMPLAN analysis and an evaluation of the impact of based aircraft. Based aircraft result in property taxes being paid into the local county revenue departments. The types of based aircraft based at each airport were classified in the following groups with estimated values: single engine (\$80,000), multi-engine (\$200,000), jet (\$3,000,000), helicopters (\$750,000), gliders (\$35,000), and ultra-light (\$15,000). The estimated value of each type of aircraft was based on assessment data from the Division of Aviation. Property tax rates appropriate for each individual airport were applied to the estimated value of the aircraft.

RESULTS

Introduction

The final result of the project includes values for output, employment, labor income, and taxes. Results are also presented in groups according to their location within the North Carolina Department of Commerce's seven regions, as shown in Exhibit 3.

The total economic output contribution of North Carolina's publicly-owned airports is approximately \$25.9 billion while supporting over 108,000 jobs (Exhibit 4). The individual values may not sum to the total values in some cases in Exhibit 4, Exhibit 5, Exhibit 6, Exhibit 7, and Exhibit 8 due to rounding. Appendix B contains the results sorted by airport code.

Aviation is clearly a significant contributor to the economic viability of the state. This study documents the significant economic contribution aviation has in supporting and encouraging local economies across the state. Commercial airports are defined as those airports with scheduled air carrier service. General aviation airports support commercial activity, such as chartered and on-demand flights, but do not have scheduled air carrier service. North Carolina's airports are located throughout the state, with most counties having either a commercial or general aviation airport. These transportation services support a diverse set of industries across the state.

Exhibit 3 – North Carolina Department of Commerce Regional Map

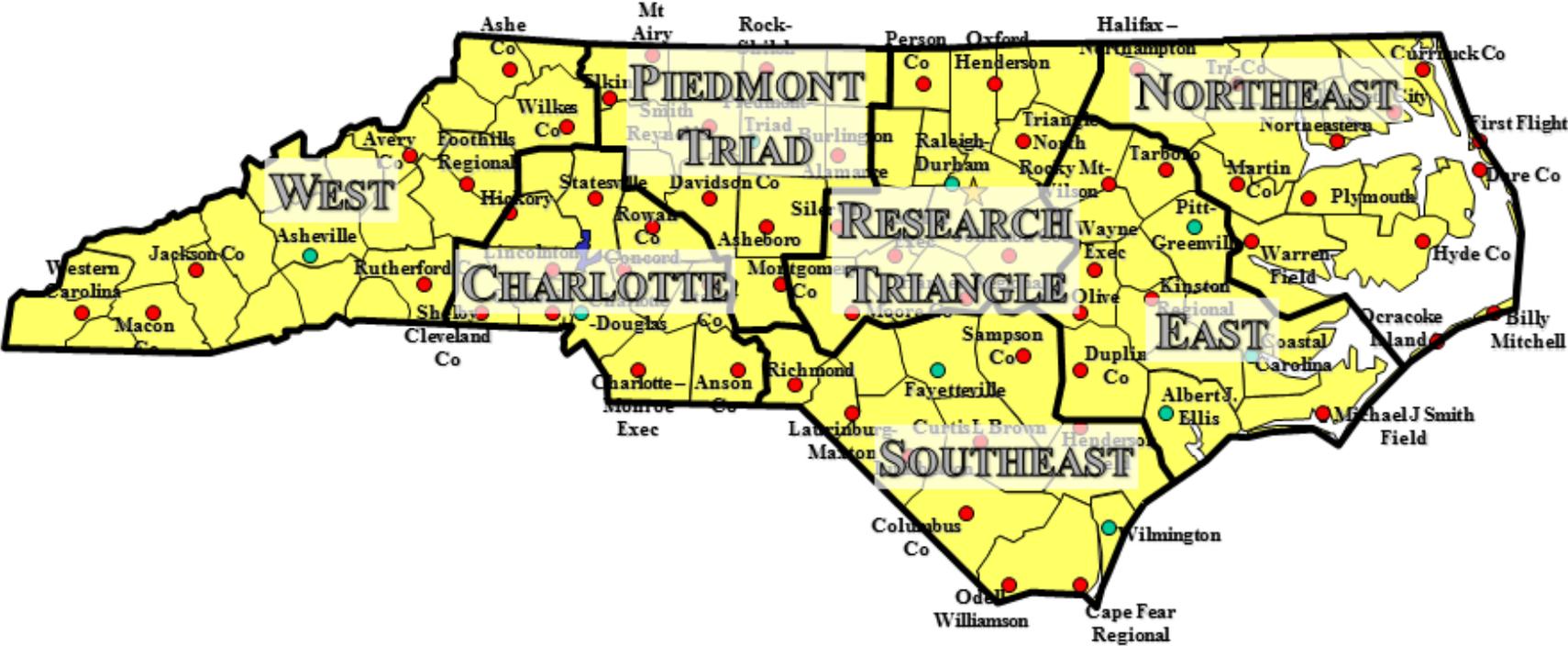


Exhibit 4 –Summary of Economic Contribution Results

Airport Category and DOC Region		Output Contribution (Revenue per Year)	Employment Contribution (Jobs)	Income Contribution (Income per Year)	State and Local Tax Contribution (Taxes per Year)
General Aviation	Charlotte	\$491 Million	4,060	\$143 Million	\$15 Million
	East	\$306 Million	1,890	\$70 Million	\$8 Million
	Northeast	\$195 Million	770	\$29 Million	\$3 Million
	Piedmont Triad	\$515 Million	5,080	\$137 Million	\$15 Million
	Research Triangle	\$265 Million	1,620	\$60 Million	\$9 Million
	Southeast	\$145 Million	1,390	\$24 Million	\$4 Million
	West	\$87 Million	650	\$17 Million	\$2 Million
General Aviation Total		\$2.01 Billion	15,460	\$0.48 Billion	\$57 Million
Commercial	Charlotte	\$12.47 Billion	60,320	\$2.45 Billion	\$474 Million
	East	\$0.45 Billion	1,010	\$0.03 Billion	\$9 Million
	Northeast	N/A	N/A	N/A	N/A
	Piedmont Triad	\$1.89 Billion	7,770	\$0.29 Billion	\$52 Million
	Research Triangle	\$7.80 Billion	20,550	\$0.71 Billion	\$148 Million
	Southeast	\$0.79 Billion	2,040	\$0.06 Billion	\$18 Million
	West	\$0.47 Billion	1,700	\$0.04 Billion	\$11 Million
Commercial Total		\$23.87 Billion	93,390	\$3.59 Billion	\$712 Million
Total		\$25.87 Billion	108,850	\$4.06 Billion	\$769 Million

Output Contribution

The 72 publicly-owned airports in North Carolina supported \$25.9 billion in output, in the form of gross revenues, of North Carolina businesses in 2010. As a frame of reference for the magnitude of the airports' contribution to the state's economy, the contribution was compared to the North Carolina gross domestic product (GDP). North Carolina's GDP in 2010 was \$424.9 billion (BEA 2010). Therefore, the airports' contribution to the state's GDP was approximately six percent (6%). Exhibit 5 presents the direct, indirect, induced, and total output contribution by airport and grouped by North Carolina Department of Commerce regions.

Employment Contribution

North Carolina airports supported 108,850 full-time and part-time jobs at North Carolina businesses in 2010. Exhibit 6 presents the direct, indirect, induced, and total employment contribution by airport and grouped by North Carolina Department of Commerce regions.

Income Contribution

North Carolina airports supported \$4.0 billion in labor income for North Carolina workers in 2010. Labor income is comprised of compensation for employees and self-employment income. Exhibit 7 presents the direct, indirect, induced, and total income contribution by airport and grouped by North Carolina Department of Commerce regions.

State and Local Tax Contribution

State and local governments in North Carolina received \$771 million in sales, property, corporate, and personal tax collections in 2010 due to activity supported by North Carolina's publicly-owned airports. The local property taxes do not include revenues earmarked for the support of public schools, which are not calculated in IMPLAN®. The local property tax related to the airport activities is \$277 million. The activity supported by the airports resulted in \$371 million in business sales tax collections across the state and \$115 million in state corporate and personal tax revenue. An estimated \$8 million is collected by local governments in the form of property taxes from based aircraft. Exhibit 8 presents the business sales tax, local property tax, state corporate and personal tax, based aircraft property tax, and total tax contribution by airport and grouped by North Carolina Department of Commerce regions.

Exhibit 5 –Output Contribution

Airport		Output (dollars)			
		Direct	Indirect	Induced	Total
Air Carrier Airports					
CLT	Charlotte Douglas International	\$4,650,190,000	\$3,403,590,000	\$4,411,490,000	\$12,465,270,000
RDU	Raleigh-Durham International	\$1,444,760,000	\$2,698,170,000	\$3,656,940,000	\$7,799,870,000
GSO	Piedmont Triad International	\$527,890,000	\$557,360,000	\$804,900,000	\$1,890,150,000
AVL	Asheville Regional	\$107,570,000	\$203,780,000	\$162,410,000	\$473,760,000
ILM	Wilmington International	\$109,290,000	\$220,890,000	\$136,080,000	\$466,260,000
FAY	Fayetteville Regional/Grannis Field	\$69,120,000	\$148,600,000	\$101,090,000	\$318,810,000
OAJ	Albert J. Ellis	\$37,250,000	\$90,430,000	\$64,210,000	\$191,890,000
EWN	Coastal Carolina Regional	\$32,100,000	\$73,770,000	\$61,310,000	\$167,180,000
PGV	Pitt-Greenville	\$21,380,000	\$43,420,000	\$32,470,000	\$97,270,000
Charlotte Region General Aviation Airports					
JQF	Concord Regional	\$77,250,000	\$36,650,000	\$61,890,000	\$175,790,000
VUJ	Stanly County	\$60,260,000	\$33,530,000	\$15,910,000	\$109,700,000
RUQ	Rowan County	\$66,770,000	\$23,680,000	\$12,900,000	\$103,350,000
EQY	Charlotte-Monroe Executive	\$6,660,000	\$6,330,000	\$9,270,000	\$22,260,000
SVH	Statesville Regional	\$9,760,000	\$5,320,000	\$6,010,000	\$21,090,000
HKY	Hickory Regional	\$5,190,000	\$6,060,000	\$5,490,000	\$16,740,000
EHO	Shelby - Cleveland County Regional	\$7,720,000	\$3,010,000	\$4,400,000	\$15,130,000
AFP	Anson County - Jeff Cloud Field	\$8,360,000	\$1,380,000	\$950,000	\$10,690,000
IPJ	Lincolnton-Lincoln County Regional	\$2,680,000	\$3,210,000	\$4,200,000	\$10,090,000
AKH	Gastonia Municipal	\$1,110,000	\$2,050,000	\$3,180,000	\$6,340,000
East Region General Aviation Airports					
ISO	Kinston Regional Jetport at Stallings Field	\$166,870,000	\$24,060,000	\$28,440,000	\$219,370,000
GWV	Wayne Executive Jetport	\$12,340,000	\$4,120,000	\$9,640,000	\$26,100,000
DPL	Duplin County	\$15,370,000	\$7,500,000	\$2,830,000	\$25,700,000
RWI	Rocky Mount-Wilson Regional	\$6,300,000	\$5,020,000	\$7,780,000	\$19,100,000
W40	Mt Olive Municipal	\$4,150,000	\$1,710,000	\$2,140,000	\$8,000,000
MRH	Michael J Smith Field	\$3,190,000	\$2,110,000	\$1,890,000	\$7,190,000
ETC	Tarboro-Edgecombe	\$60,000	\$470,000	\$30,000	\$560,000

Exhibit 5 –Output Contribution (continued)

Airport		Output (dollars)			
		Direct	Indirect	Induced	Total
Northeast Region General Aviation Airports					
ECG	Elizabeth City CG Air Station/Regional	\$123,140,000	\$8,080,000	\$12,790,000	\$144,010,000
MQI	Dare County Regional	\$3,130,000	\$3,270,000	\$4,230,000	\$10,630,000
IXA	Halifax - Northampton Regional	\$4,220,000	\$3,740,000	\$2,230,000	\$10,190,000
ONX	Currituck County Regional	\$2,950,000	\$3,000,000	\$4,110,000	\$10,060,000
FFA	First Flight	\$330,000	\$2,640,000	\$810,000	\$3,780,000
OCW	Warren Field	\$1,100,000	\$940,000	\$1,670,000	\$3,710,000
ASJ	Tri-County	\$280,000	\$1,220,000	\$1,950,000	\$3,450,000
EDE	Northeastern Regional	\$50,000	\$1,260,000	\$1,260,000	\$2,570,000
W95	Ocracoke Island	\$750,000	\$620,000	\$560,000	\$1,930,000
PMZ	Plymouth Municipal	\$510,000	\$640,000	\$780,000	\$1,930,000
HSE	Billy Mitchell	\$400,000	\$980,000	\$380,000	\$1,760,000
MCZ	Martin County	\$330,000	\$430,000	\$220,000	\$980,000
7W6	Hyde County	\$-	\$430,000	\$-	\$430,000
Piedmont Triad Region General Aviation Airports					
MWK	Mt Airy/Surry County	\$178,880,000	\$23,640,000	\$19,510,000	\$222,030,000
INT	Smith-Reynolds	\$96,760,000	\$46,400,000	\$52,390,000	\$195,550,000
BUY	Burlington-Alamance Regional	\$36,260,000	\$12,440,000	\$23,150,000	\$71,850,000
EXX	Davidson County	\$6,390,000	\$1,970,000	\$1,960,000	\$10,320,000
HBI	Asheboro Regional	\$1,220,000	\$1,560,000	\$3,160,000	\$5,940,000
ZEF	Elkin Municipal	\$1,700,000	\$1,120,000	\$1,490,000	\$4,310,000
SIF	Rockingham County/NC Shiloh	\$460,000	\$1,700,000	\$1,700,000	\$3,860,000
43A	Montgomery County	\$290,000	\$280,000	\$840,000	\$1,410,000
Research Triangle Region General Aviation Airports					
HRJ	Harnett Regional Jetport	\$66,880,000	\$11,790,000	\$9,250,000	\$87,920,000
JNX	Johnston County	\$38,620,000	\$10,530,000	\$13,450,000	\$62,600,000
SOP	Moore County	\$22,950,000	\$6,670,000	\$5,620,000	\$35,240,000
TTA	Raleigh Exec Jetport at Sanford-Lee County	\$13,480,000	\$9,760,000	\$8,930,000	\$32,170,000
LHZ	Triangle North Executive	\$7,910,000	\$5,620,000	\$10,310,000	\$23,840,000
TDF	Person County	\$110,000	\$3,160,000	\$6,320,000	\$9,590,000
5W8	Siler City Municipal	\$970,000	\$2,930,000	\$4,830,000	\$8,730,000
HNZ	Henderson-Oxford	\$190,000	\$2,260,000	\$2,830,000	\$5,280,000

Exhibit 5 –Output Contribution (continued)

Airport		Output (dollars)			
		Direct	Indirect	Induced	Total
Southeast Region General Aviation Airports					
SUT	Cape Fear Rgnl Jetport/Howie Franklin Fld	\$26,210,000	\$15,700,000	\$19,820,000	\$61,730,000
MEB	Laurinburg-Maxton	\$27,630,000	\$5,530,000	\$9,650,000	\$42,810,000
CPC	Columbus County Municipal	\$9,070,000	\$3,200,000	\$3,550,000	\$15,820,000
EYF	Curtis L Brown, Jr. Field	\$2,140,000	\$2,280,000	\$2,850,000	\$7,270,000
ACZ	Henderson Field	\$560,000	\$1,760,000	\$4,110,000	\$6,430,000
LBT	Lumberton Municipal	\$1,180,000	\$2,050,000	\$2,870,000	\$6,100,000
RCZ	Richmond County	\$210,000	\$870,000	\$1,520,000	\$2,600,000
60J	Odell Williamson Municipal	\$100,000	\$690,000	\$1,380,000	\$2,170,000
CTZ	Clinton-Sampson County	\$150,000	\$90,000	\$30,000	\$270,000
West Region General Aviation Airports					
GEV	Ashe County	\$23,890,000	\$4,750,000	\$4,340,000	\$32,980,000
UKF	Wilkes County	\$16,650,000	\$2,070,000	\$2,190,000	\$20,910,000
RHP	Western Carolina Regional	\$11,060,000	\$3,240,000	\$2,980,000	\$17,280,000
7A8	Avery County/Morrison Field	\$2,350,000	\$1,100,000	\$1,430,000	\$4,880,000
1A5	Macon County	\$2,150,000	\$1,440,000	\$900,000	\$4,490,000
MRN	Foothills Regional	\$90,000	\$1,270,000	\$1,910,000	\$3,270,000
FQD	Rutherford County-Marchman Field	\$370,000	\$1,250,000	\$1,410,000	\$3,030,000
24A	Jackson County	\$230,000	\$80,000	\$120,000	\$430,000
<i>Total</i>		\$ 8,187,890,000	\$7,822,670,000	\$9,865,640,000	\$25,876,200,000

Exhibit 6 –Employment Contribution

Airport		Employment (jobs)			
		Direct	Indirect	Induced	Total
Air Carrier Airports					
CLT	Charlotte Douglas International	17,890	28,500	13,930	60,320
RDU	Raleigh-Durham International	7,390	8,680	4,480	20,550
GSO	Piedmont Triad International	2,440	3,460	1,870	7,770
AVL	Asheville Regional	750	680	270	1,700
ILM	Wilmington International	610	510	180	1,300
FAY	Fayetteville Regional/Grannis Field	380	260	100	740
EWN	Coastal Carolina Regional	150	140	70	360
OAJ	Albert J. Ellis	170	120	50	340
PGV	Pitt-Greenville	150	110	50	310
Charlotte Region General Aviation Airports					
JQF	Concord Regional	900	710	370	1,980
VUJ	Stanly County	190	380	140	710
RUQ	Rowan County	270	290	110	670
SVH	Statesville Regional	110	60	30	200
EHO	Shelby - Cleveland County Regional	90	40	30	160
EQY	Charlotte-Monroe Executive	70	50	30	150
HKY	Hickory Regional	30	30	10	70
IPJ	Lincolnton-Lincoln County Regional	30	20	10	60
AFP	Anson County - Jeff Cloud Field	10	10	10	30
AKH	Gastonia Municipal	10	10	10	30
East Region General Aviation Airports					
ISO	Kinston Regional Jetport at Stallings Field	550	440	240	1,230
GWW	Wayne Executive Jetport	120	80	50	250
DPL	Duplin County	70	50	20	140
RWI	Rocky Mount-Wilson Regional	60	50	30	140
W40	Mt Olive Municipal	30	20	10	60
MRH	Michael J Smith Field	30	20	10	60
ETC	Tarboro-Edgecombe	<10	<10	<10	10
Northeast Region General Aviation Airports					
ECG	Elizabeth City CG Air Station/Regional	230	170	110	510
MQI	Dare County Regional	40	20	10	70
ONX	Currituck County Regional	20	10	10	40
IXA	Halifax - Northampton Regional	20	10	<10	30
OCW	Warren Field	10	10	10	30
PMZ	Plymouth Municipal	10	<10	<10	20
W95	Ocracoke Island	10	<10	<10	20
MCZ	Martin County	<10	<10	<10	10
EDE	Northeastern Regional	<10	<10	<10	10
ASJ	Tri-County	<10	<10	<10	10
HSE	Billy Mitchell	<10	<10	<10	10
FFA	First Flight	<10	<10	<10	10
7W6	Hyde County	<10	<10	<10	<10

Exhibit 6 –Employment Contribution (continued)

Airport		Employment (jobs)			
		Direct	Indirect	Induced	Total
Piedmont Triad Region General Aviation Airports					
INT	Smith-Reynolds	1,040	950	430	2,420
MWK	Mt Airy/Surry County	1,270	460	210	1,940
BUY	Burlington-Alamance Regional	180	230	140	550
EXX	Davidson County	60	30	20	110
HBI	Asheboro Regional	10	10	10	30
ZEF	Elkin Municipal	<10	<10	<10	10
43A	Montgomery County	<10	<10	<10	10
SIF	Rockingham County/NC Shiloh	<10	<10	<10	10
Research Triangle Region General Aviation Airports					
JNX	Johnston County	180	210	110	500
HRJ	Harnett Regional Jetport	140	140	80	360
TTA	Raleigh Exec Jetport at Sanford-Lee County	110	130	60	300
SOP	Moore County	120	90	50	260
LHZ	Triangle North Executive	70	60	30	160
5W8	Siler City Municipal	10	10	<10	20
HNZ	Henderson-Oxford	<10	<10	<10	10
TDF	Person County	<10	<10	<10	10
Southeast Region General Aviation Airports					
SUT	Cape Fear Rgnl Jetport/Howie Franklin Fld	290	210	100	600
MEB	Laurinburg-Maxton	350	100	60	510
CPC	Columbus County Municipal	100	40	20	160
LBT	Lumberton Municipal	20	10	<10	40
EYF	Curtis L Brown, Jr. Field	10	10	<10	30
ACZ	Henderson Field	10	<10	<10	20
60J	Odell Williamson Municipal	<10	<10	<10	10
RCZ	Richmond County	<10	<10	<10	10
CTZ	Clinton-Sampson County	<10	<10	<10	10
West Region General Aviation Airports					
GEV	Ashe County	110	70	40	220
RHP	Western Carolina Regional	110	50	20	180
UKF	Wilkes County	40	30	20	90
7A8	Avery County/Morrison Field	50	20	10	80
1A5	Macon County	20	10	<10	40
FQD	Rutherford County-Marchman Field	10	<10	<10	20
MRN	Foothills Regional	<10	<10	<10	10
24A	Jackson County	<10	<10	<10	10
Total		37,150	47,810	23,660	108,850

Exhibit 7 –Income Contribution

Airport		Income (dollars)			
		Direct	Indirect	Induced	Total
Air Carrier Airports					
CLT	Charlotte Douglas International	\$1,372,820,000	\$496,250,000	\$580,320,000	\$2,449,390,000
RDU	Raleigh-Durham International	\$397,580,000	\$143,760,000	\$173,370,000	\$714,710,000
GSO	Piedmont Triad International	\$160,530,000	\$56,300,000	\$68,720,000	\$285,550,000
AVL	Asheville Regional	\$22,810,000	\$10,370,000	\$8,290,000	\$41,470,000
ILM	Wilmington International	\$22,220,000	\$10,430,000	\$5,570,000	\$38,220,000
FAY	Fayetteville Regional/Grannis Field	\$14,410,000	\$5,170,000	\$2,950,000	\$22,530,000
EWN	Coastal Carolina Regional	\$8,740,000	\$2,580,000	\$1,770,000	\$13,090,000
OAJ	Albert J. Ellis	\$8,800,000	\$2,260,000	\$1,240,000	\$12,300,000
PGV	Pitt-Greenville	\$4,600,000	\$2,200,000	\$1,340,000	\$8,140,000
Charlotte Region General Aviation Airports					
JQF	Concord Regional	\$45,070,000	\$12,520,000	\$16,060,000	\$73,650,000
VUJ	Stanly County	\$10,120,000	\$10,960,000	\$5,840,000	\$26,920,000
RUQ	Rowan County	\$11,750,000	\$5,570,000	\$3,260,000	\$20,580,000
SVH	Statesville Regional	\$3,540,000	\$1,040,000	\$900,000	\$5,480,000
EQY	Charlotte-Monroe Executive	\$3,230,000	\$960,000	\$1,210,000	\$5,400,000
EHO	Shelby - Cleveland County Regional	\$3,330,000	\$530,000	\$760,000	\$4,620,000
HKY	Hickory Regional	\$1,310,000	\$390,000	\$360,000	\$2,060,000
IPJ	Lincolnton-Lincoln County Regional	\$1,140,000	\$290,000	\$300,000	\$1,730,000
AFP	Anson County - Jeff Cloud Field	\$790,000	\$240,000	\$150,000	\$1,180,000
AKH	Gastonia Municipal	\$630,000	\$190,000	\$230,000	\$1,050,000
East Region General Aviation Airports					
ISO	Kinston Regional Jetport at Stallings Field	\$31,730,000	\$7,420,000	\$7,190,000	\$46,340,000
GWV	Wayne Executive Jetport	\$7,130,000	\$930,000	\$1,530,000	\$9,590,000
DPL	Duplin County	\$2,820,000	\$1,580,000	\$730,000	\$5,130,000
RWI	Rocky Mount-Wilson Regional	\$3,340,000	\$750,000	\$760,000	\$4,850,000
W40	Mt Olive Municipal	\$1,550,000	\$330,000	\$330,000	\$2,210,000
MRH	Michael J Smith Field	\$980,000	\$230,000	\$200,000	\$1,410,000
ETC	Tarboro-Edgecombe	\$50,000	\$-	\$10,000	\$60,000

Exhibit 7 –Income Contribution (continued)

Airport		Income (dollars)			
		Direct	Indirect	Induced	Total
Northeast Region General Aviation Airports					
ECG	Elizabeth City CG Air Station/Regional	\$16,710,000	\$2,270,000	\$3,020,000	\$22,000,000
ONX	Currituck County Regional	\$1,690,000	\$260,000	\$210,000	\$2,160,000
MQI	Dare County Regional	\$1,390,000	\$270,000	\$280,000	\$1,940,000
IXA	Halifax - Northampton Regional	\$720,000	\$160,000	\$110,000	\$990,000
OCW	Warren Field	\$610,000	\$120,000	\$150,000	\$880,000
W95	Ocracoke Island	\$240,000	\$30,000	\$20,000	\$290,000
PMZ	Plymouth Municipal	\$210,000	\$30,000	\$30,000	\$270,000
ASJ	Tri-County	\$140,000	\$20,000	\$20,000	\$180,000
MCZ	Martin County	\$90,000	\$20,000	\$10,000	\$120,000
HSE	Billy Mitchell	\$40,000	\$40,000	\$10,000	\$90,000
FFA	First Flight	\$40,000	\$30,000	\$10,000	\$80,000
EDE	Northeastern Regional	\$20,000	\$-	\$-	\$20,000
7W6	Hyde County	\$-	\$-	\$-	\$-
Piedmont Triad Region General Aviation Airports					
INT	Smith-Reynolds	\$33,390,000	\$18,430,000	\$16,360,000	\$68,180,000
MWK	Mt Airy/Surry County	\$29,120,000	\$6,930,000	\$5,370,000	\$41,420,000
BUY	Burlington-Alamance Regional	\$13,730,000	\$3,560,000	\$5,090,000	\$22,380,000
EXX	Davidson County	\$2,200,000	\$460,000	\$360,000	\$3,020,000
HBI	Asheboro Regional	\$740,000	\$170,000	\$270,000	\$1,180,000
ZEF	Elkin Municipal	\$240,000	\$40,000	\$40,000	\$320,000
SIF	Rockingham County/NC Shiloh	\$160,000	\$80,000	\$70,000	\$310,000
43A	Montgomery County	\$200,000	\$10,000	\$30,000	\$240,000
Research Triangle Region General Aviation Airports					
JNX	Johnston County	\$9,870,000	\$3,610,000	\$4,190,000	\$17,670,000
HRJ	Harnett Regional Jetport	\$11,830,000	\$2,430,000	\$2,110,000	\$16,370,000
TTA	Raleigh Exec Jetport at Sanford-Lee County	\$4,640,000	\$2,730,000	\$2,320,000	\$9,690,000
SOP	Moore County	\$6,590,000	\$1,550,000	\$1,450,000	\$9,590,000
LHZ	Triangle North Executive	\$3,340,000	\$910,000	\$1,390,000	\$5,640,000
5W8	Siler City Municipal	\$530,000	\$70,000	\$80,000	\$680,000
HNZ	Henderson-Oxford	\$90,000	\$10,000	\$10,000	\$110,000
TDF	Person County	\$70,000	\$10,000	\$20,000	\$100,000

Exhibit 7 –Income Contribution (continued)

Airport		Income (dollars)			
		Direct	Indirect	Induced	Total
Southeast Region General Aviation Airports					
MEB	Laurinburg-Maxton	\$9,010,000	\$1,150,000	\$1,660,000	\$11,820,000
SUT	Cape Fear Rgnl Jetport/Howie Franklin Fld	\$3,360,000	\$940,000	\$970,000	\$5,270,000
CPC	Columbus County Municipal	\$2,900,000	\$530,000	\$570,000	\$4,000,000
EYF	Curtis L Brown, Jr. Field	\$890,000	\$140,000	\$80,000	\$1,110,000
LBT	Lumberton Municipal	\$550,000	\$90,000	\$100,000	\$740,000
ACZ	Henderson Field	\$320,000	\$20,000	\$40,000	\$380,000
RCZ	Richmond County	\$110,000	\$20,000	\$20,000	\$150,000
60J	Odell Williamson Municipal	\$60,000	\$10,000	\$10,000	\$80,000
CTZ	Clinton-Sampson County	\$60,000	\$10,000	\$10,000	\$80,000
West Region General Aviation Airports					
GEV	Ashe County	\$4,060,000	\$1,070,000	\$1,020,000	\$6,150,000
RHP	Western Carolina Regional	\$2,860,000	\$710,000	\$540,000	\$4,110,000
UKF	Wilkes County	\$2,910,000	\$510,000	\$440,000	\$3,860,000
7A8	Avery County/Morrison Field	\$1,170,000	\$170,000	\$220,000	\$1,560,000
1A5	Macon County	\$440,000	\$190,000	\$120,000	\$750,000
FQD	Rutherford County-Marchman Field	\$130,000	\$30,000	\$20,000	\$180,000
24A	Jackson County	\$90,000	\$10,000	\$20,000	\$120,000
MRN	Foothills Regional	\$50,000	\$10,000	\$10,000	\$70,000
Total		\$ 2,308,630,000	\$823,110,000	\$932,270,000	\$4,064,000,000

Exhibit 8 – Tax Contribution

Airport		Business Sales Tax	Local Property Tax	State Corporate and Personal Tax	Based Aircraft Property Tax	Total
Air Carrier Airports						
CLT	Charlotte Douglas International	\$231,285,000	\$172,771,000	\$68,596,000	\$1,445,000	\$474,097,000
RDU	Raleigh-Durham International	\$72,489,000	\$54,138,000	\$20,637,000	\$686,000	\$147,950,000
GSO	Piedmont Triad International	\$24,882,000	\$18,599,000	\$8,162,000	\$340,000	\$51,983,000
ILM	Wilmington International	\$5,726,000	\$4,269,000	\$1,092,000	\$166,000	\$11,253,000
AVL	Asheville Regional	\$5,526,000	\$4,122,000	\$1,225,000	\$245,000	\$11,118,000
FAY	Fayetteville Regional/Grannis Field	\$3,496,000	\$2,606,000	\$644,000	\$183,000	\$6,929,000
OAJ	Albert J. Ellis	\$1,877,000	\$1,399,000	\$361,000	\$13,000	\$3,650,000
EWN	Coastal Carolina Regional	\$1,567,000	\$1,169,000	\$360,000	\$63,000	\$3,159,000
PGV	Pitt-Greenville	\$1,011,000	\$754,000	\$228,000	\$168,000	\$2,161,000
Charlotte Region General Aviation Airports						
JQF	Concord Regional	\$3,126,000	\$2,348,000	\$1,724,000	\$667,000	\$7,865,000
VUJ	Stanly County	\$958,000	\$721,000	\$707,000	\$12,000	\$2,398,000
RUQ	Rowan County	\$802,000	\$604,000	\$606,000	\$120,000	\$2,132,000
SVH	Statesville Regional	\$437,000	\$327,000	\$154,000	\$376,000	\$1,294,000
EHO	Shelby - Cleveland County Regional	\$572,000	\$427,000	\$134,000	\$25,000	\$1,158,000
EQY	Charlotte-Monroe Executive	\$179,000	\$135,000	\$136,000	\$121,000	\$571,000
HKY	Hickory Regional	\$189,000	\$141,000	\$72,000	\$151,000	\$553,000
IPJ	Lincolnton-Lincoln County Regional	\$90,000	\$68,000	\$52,000	\$51,000	\$261,000
AKH	Gastonia Municipal	\$35,000	\$27,000	\$24,000	\$76,000	\$162,000
AFP	Anson County - Jeff Cloud Field	\$55,000	\$42,000	\$53,000	\$20,000	\$170,000
East Region General Aviation Airports						
ISO	Kinston Regional Jetport at Stallings Field	\$2,377,000	\$1,783,000	\$1,310,000	\$286,000	\$5,756,000
GWW	Wayne Executive Jetport	\$341,000	\$257,000	\$263,000	\$95,000	\$956,000
DPL	Duplin County	\$159,000	\$120,000	\$128,000	\$81,000	\$488,000
RWI	Rocky Mount-Wilson Regional	\$154,000	\$116,000	\$127,000	\$58,000	\$455,000
MRH	Michael J Smith Field	\$126,000	\$94,000	\$44,000	\$21,000	\$285,000
W40	Mt Olive Municipal	\$94,000	\$71,000	\$61,000	\$8,000	\$234,000
ETC	Tarboro-Edgecombe	\$1,000	\$1,000	\$1,000	\$5,000	\$8,000

Exhibit 8 – Tax Contribution (continued)

Airport		Business Sales Tax	Local Property Tax	State Corporate and Personal Tax	Based Aircraft Property Tax	Total
Northeast Region General Aviation Airports						
ECG	Elizabeth City CG Air Station/Regional	\$760,000	\$573,000	\$670,000	\$22,000	\$2,025,000
IXA	Halifax - Northampton Regional	\$191,000	\$142,000	\$29,000	\$15,000	\$377,000
ONX	Currituck County Regional	\$104,000	\$78,000	\$59,000	\$13,000	\$254,000
MQI	Dare County Regional	\$101,000	\$76,000	\$50,000	\$16,000	\$243,000
OCW	Warren Field	\$30,000	\$23,000	\$23,000	\$29,000	\$105,000
PMZ	Plymouth Municipal	\$32,000	\$24,000	\$8,000	\$11,000	\$75,000
W95	Ocracoke Island	\$29,000	\$22,000	\$9,000	\$-	\$60,000
ASJ	Tri-County	\$8,000	\$6,000	\$5,000	\$34,000	\$53,000
HSE	Billy Mitchell	\$22,000	\$17,000	\$3,000	\$1,000	\$43,000
EDE	Northeastern Regional	\$1,000	\$1,000	\$1,000	\$26,000	\$29,000
MCZ	Martin County	\$4,000	\$3,000	\$3,000	\$4,000	\$14,000
FFA	First Flight	\$3,000	\$3,000	\$2,000	\$-	\$8,000
7W6	Hyde County	\$-	\$-	\$-	\$-	\$-
Piedmont Triad Region General Aviation Airports						
INT	Smith-Reynolds	\$2,512,000	\$1,891,000	\$1,876,000	\$399,000	\$6,678,000
MWK	Mt Airy/Surry County	\$2,274,000	\$1,705,000	\$1,318,000	\$72,000	\$5,369,000
BUY	Burlington-Alamance Regional	\$741,000	\$559,000	\$610,000	\$107,000	\$2,017,000
EXX	Davidson County	\$284,000	\$212,000	\$87,000	\$130,000	\$713,000
HBI	Asheboro Regional	\$36,000	\$27,000	\$31,000	\$32,000	\$126,000
ZEF	Elkin Municipal	\$51,000	\$38,000	\$11,000	\$18,000	\$118,000
SIF	Rockingham County/NC Shiloh	\$19,000	\$14,000	\$9,000	\$35,000	\$77,000
43A	Montgomery County	\$7,000	\$5,000	\$7,000	\$12,000	\$31,000
Research Triangle Region General Aviation Airports						
JNX	Johnston County	\$1,977,000	\$1,476,000	\$518,000	\$137,000	\$4,108,000
HRJ	Harnett Regional Jetport	\$598,000	\$450,000	\$474,000	\$100,000	\$1,622,000
TTA	Raleigh Exec Jetport at Sanford-Lee County	\$398,000	\$300,000	\$275,000	\$126,000	\$1,099,000
SOP	Moore County	\$375,000	\$282,000	\$274,000	\$81,000	\$1,012,000
LHZ	Triangle North Executive	\$274,000	\$206,000	\$163,000	\$128,000	\$771,000
5W8	Siler City Municipal	\$27,000	\$20,000	\$19,000	\$20,000	\$86,000
HNZ	Henderson-Oxford	\$6,000	\$4,000	\$3,000	\$37,000	\$50,000
TDF	Person County	\$3,000	\$2,000	\$2,000	\$26,000	\$33,000

Exhibit 8 – Tax Contribution (continued)

Airport		Business Sales Tax	Local Property Tax	State Corporate and Personal Tax	Based Aircraft Property Tax	Total
Southeast Region General Aviation Airports						
SUT	Cape Fear Rgnl Jetport/Howie Franklin Fld	\$1,042,000	\$781,000	\$491,000	\$27,000	\$2,341,000
MEB	Laurinburg-Maxton	\$562,000	\$422,000	\$376,000	\$18,000	\$1,378,000
CPC	Columbus County Municipal	\$301,000	\$225,000	\$112,000	\$15,000	\$653,000
EYF	Curtis L Brown, Jr. Field	\$78,000	\$59,000	\$30,000	\$95,000	\$262,000
LBT	Lumberton Municipal	\$41,000	\$31,000	\$19,000	\$37,000	\$128,000
CTZ	Clinton-Sampson County	\$5,000	\$3,000	\$2,000	\$65,000	\$75,000
ACZ	Henderson Field	\$21,000	\$16,000	\$10,000	\$12,000	\$59,000
RCZ	Richmond County	\$6,000	\$4,000	\$4,000	\$9,000	\$23,000
60J	Odell Williamson Municipal	\$3,000	\$2,000	\$2,000	\$7,000	\$14,000
West Region General Aviation Airports						
UKF	Wilkes County	\$216,000	\$162,000	\$108,000	\$184,000	\$670,000
GEV	Ashe County	\$263,000	\$198,000	\$195,000	\$12,000	\$668,000
RHP	Western Carolina Regional	\$167,000	\$125,000	\$128,000	\$48,000	\$468,000
1A5	Macon County	\$124,000	\$92,000	\$23,000	\$9,000	\$248,000
7A8	Avery County/Morrison Field	\$53,000	\$40,000	\$42,000	\$10,000	\$145,000
FQD	Rutherford County-Marchman Field	\$12,000	\$9,000	\$5,000	\$78,000	\$104,000
MRN	Foothills Regional	\$3,000	\$2,000	\$2,000	\$67,000	\$74,000
24A	Jackson County	\$9,000	\$6,000	\$4,000	\$4,000	\$23,000
Total		\$371,327,000	\$277,445,000	\$114,993,000	\$7,810,000	\$771,575,000

COMPARISON TO OTHER STATES' AIRPORTS

To gain a sense of perspective of the contribution of NC airports, the contribution of other states' airports are summarized in Exhibit 9.

Exhibit 9 –State Economic Contribution Study Summary

State	Year	Number of Airports	Total Jobs	Total Payroll	Total Output	Modeling Used
North Carolina	2012	72	108,850	\$4,064,000,000	\$25,876,200,000	IMPLAN
Alaska	2009	98	47,000		\$3,500,000,000	IMPLAN
Arizona	2002		470,708	\$14,664,000,000	\$38,525,000,000	IMPLAN
Arkansas	2006	91	39,703	\$1,237,977,900	\$3,065,364,800	
California	2003	250	1,704,680		\$110,700,000,000	REMI
Colorado	2008	74	340,786	\$11,173,886,400	\$32,204,298,900	RIMS II
Delaware	2006	11	15,489	\$594,224,800	\$989,247,000	IMPLAN
Florida	2010	132	1,000,632	\$30,600,000,000	\$97,000,000,000	IMPLAN
Georgia	2011	104	471,175	\$17,800,000,000	\$62,630,000,000	IMPLAN
Idaho	2008	75	23,000	\$718,517,800	\$2,097,463,200	IMPLAN
Indiana	2005	102	18,937	\$480,000,000	\$4,900,000,000	
Iowa	2000	109	9,865	\$296,173,314	\$834,093,899	IMPLAN
Maine	2006	36	20,913	\$487,874,400	\$1,504,675,600	
Massachusetts	2011	39	124,369	\$4,900,000,000	\$11,900,000,000	
Minnesota	2009		164,900	\$6,451,291,831	\$12,207,112,445	IMPLAN
Mississippi		78	10,347	\$203,700,000	\$637,000,000	
Missouri		77	149,500	\$3,700,000,000	\$9,500,000,000	
Montana	2008		18,800	\$600,000,000	\$1,560,000,000	IMPLAN
New Mexico	2009	51	48,795	\$1,300,000,000	\$3,200,000,000	
New York	2010	90	394,500	\$18,052,000,000	\$50,255,000,000	
North Dakota	2010	89	15,480	\$589,454,300	\$1,622,916,300	
Oklahoma	1999		143,700	\$4,700,000,000	\$11,700,000,000	IMPLAN
Oregon	2008	91	191,492	\$6,591,453,000	\$23,718,435,000	IMPLAN
Pennsylvania	2011	133	304,462	\$9,200,000,000	\$23,600,000,000	
Rhode Island	2006	6	23,318	\$660,857,100	\$2,101,891,300	
South Carolina	2006	60	65,533	\$1,900,000,000	\$4,300,000,000	
Texas	2010		771,355	\$23,231,069,000	\$59,510,557,000	IMPLAN
Utah	2003	47	106,350	\$2,830,000,000	\$5,680,000,000	
Vermont	2003	17	9,500	\$225,000,000	\$611,762,971	
Virginia	2004	66	258,996	\$11,131,873	\$28,800,524	IMPLAN
Washington	2012	135	248,500	\$15,300,000,000	\$50,900,000,000	IMPLAN
Wisconsin	2002	98	41,738	\$1,100,000,000	\$2,800,000,000	IMPLAN

RECOMMENDATIONS

RECOMMENDATIONS FOR IMPLEMENTATION

The project team recommends that the North Carolina Department of Transportation's Division of Aviation present this information on the existing contribution of aviation activities to various audiences such as the State General Assembly, the North Carolina Department of Transportation's Board of Transportation, industries located in North Carolina, as well as industries that could potentially locate in North Carolina. The report and accompanying brochure (developed as part of this research effort to summarize the key findings) will provide easily understood summaries of the contribution of aviation while this report contains a detailed description of the methodology and results. The airport activities are essentially service functions supporting business activity throughout the state and beyond. In addition to disseminating the current findings, communication efforts should seek to ensure that the public and important policy makers understand the essential role of these airports in sustaining economic success by facilitating local, regional, national, and global access for commerce involving North Carolina interests.

The primary product is a documented economic contribution of the 72 publicly-owned airports on North Carolina's economy. Another primary product is a documented procedure for generating this economic contribution that can be repeated for future studies. These products are described in detail in this report along with a brochure for public distribution. These two products document aviation activity for the Division of Aviation to show the existing and potential economic contribution of the 72 airports currently in NC on both a statewide as well as a county specific level. The overall goal is to be able to use these tools provided by the research effort when addressing various audiences to effectively convey the level of contribution that aviation has throughout the state.

RECOMMENDATIONS FOR FUTURE EFFORT

This economic contribution study required a tremendous amount of data collection effort. This type of study is important for the aviation community in North Carolina, particularly each airport and airport manager. A responsibility should be placed on the airport managers to help ensure that a high percentage of the surveys are returned from tenants and major users. From this study, the project team observed that a proactive manager can significantly increase the flow of information and decrease the burden on the research staff. This type of study is important for the airport community in North Carolina and should be reviewed at regular time intervals, perhaps every five years. This study is a conservative estimate of the economic contribution of aviation in North Carolina without applying any extrapolation techniques to replace missing data. While all airport managers completed the survey, some tenants and major users did not, therefore, the impacts from those businesses were not included. The expenditure of public funds on capital improvement projects at airports has an impact on the economy. The effect of construction projects at airports is primarily through indirect and induced impacts. These impacts were not included in this study, but could be estimated in future studies.

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APPENDIX A: AIRPORT INFLUENCE AREAS BY COUNTY

Airport	Counties
Albert J. Ellis (OAJ)	Onslow, Pender, Duplin, Jones, Carteret
Anson County - Jeff Cloud Field (AFP)	Anson, Richmond
Ashe County (GEV)	Ashe, Alleghany, Watauga
Asheboro Regional (HBI)	Randolph, Guilford, Chatham
Asheville Regional (AVL)	Buncombe, Henderson, Haywood, Madison, McDowell, Transylvania, Jackson, Swain, Macon
Avery County/Morrison Field (7A8)	Avery, Mitchell, McDowell, Burke
Billy Mitchell (HSE)	Dare
Burlington-Alamance Regional (BUY)	Alamance, Guilford, Orange, Caswell
Cape Fear Regional Jetport	Brunswick, New Hanover
Charlotte Douglas International (CLT)	Mecklenburg, Gaston, Cabarrus, Cleveland, Rowan, Union, Lincoln, Catawba, Iredell, Stanly, Anson
Charlotte-Monroe Executive (EQY)	Union, Mecklenburg, Anson, Cabarrus, Stanly
Clinton-Sampson County (CTZ)	Sampson
Coastal Carolina Regional (EWN)	Craven, Pamlico, Carteret
Columbus County Municipal (CPC)	Columbus
Concord Regional (JQF)	Cabarrus, Mecklenburg, Rowan, Lincoln, Iredell
Currituck County Regional (ONX)	Currituck, Camden
Curtis L Brown, Jr. Field (EYF)	Bladen
Dare County Regional (MQI)	Dare, Tyrrell
Davidson County (EXX)	Davidson, Davie
Duplin County (DPL)	Duplin, Wayne
Elizabeth City CG Air Station/Regional (ECG)	Pasquotank, Camden, Perquimans, Gates
Elkin Municipal (ZEF)	Surry, Yadkin
Fayetteville Regional/Grannis Field (FAY)	Cumberland, Hoke, Harnett, Sampson, Robeson, Bladen,
First Flight (FFA)	Dare
Foothills Regional (MRN)	Caldwell, Burke
Gastonia Municipal (AKH)	Gaston, Mecklenburg
Halifax - Northampton Regional (IXA)	Halifax, Warren, Northampton
Harnett Regional Jetport (HRJ)	Harnett, Sampson, Johnston, Cumberland
Henderson Field (ACZ)	Pender, Duplin, Sampson
Henderson-Oxford (HNZ)	Granville, Vance
Hickory Regional (HKY)	Catawba, Burke, Caldwell, Alexander
Hyde County (7W6)	Hyde
Jackson County (24A)	Jackson
Johnston County (JNX)	Johnston, Wake, Wilson
Kinston Regional Jetport at Stallings Field (ISO)	Lenoir, Greene, Craven, Pitt, Jones
Laurinburg-Maxton (MEB)	Scotland, Hoke, Robeson
Lincolnton-Lincoln County Regional (IPJ)	Lincoln, Gaston, Catawba
Lumberton Municipal (LBT)	Robeson, Bladen
Macon County (1A5)	Macon, Swain, Jackson
Martin County (MCZ)	Martin, Bertie
Michael J Smith Field (MRH)	Carteret
Montgomery County (43A)	Montgomery
Moore County (SOP)	Moore, Hoke, Lee, Harnett, Richmond
Mt Airy/Surry County (MWK)	Surry, Stokes
Mt Olive Municipal (W40)	Wayne, Duplin
Northeastern Regional (EDE)	Chowan, Perquimans, Bertie, Washington,
Ocracoke Island (W95)	Hyde

Airport	Counties
Odell Williamson Municipal (60J)	Brunswick
Person County (TDF)	Person, Orange, Durham
Piedmont Triad International (GSO)	Guilford, Davidson, Forsyth, Randolph, Rockingham, Stokes, Alamance, Davie, Yadkin, Surry, Caswell
Pitt-Greenville (PGV)	Pitt, Beaufort, Greene, Edgecombe, Martin
Plymouth Municipal (PMZ)	Washington, Martin
Raleigh Executive Jetport (TTA)	Lee, Wake, Chatham
Raleigh-Durham International (RDU)	Wake, Durham, Franklin, Johnston, Chatham, Orange, Person, Alamance, Harnett, Vance, Wilson, Lee, Granville
Richmond County (RCZ)	Richmond, Scotland
Rockingham County/NC Shiloh (SIF)	Rockingham, Guilford
Rocky Mount-Wilson Regional (RWI)	Nash, Wilson, Edgecombe
Rowan County (RUQ)	Rowan, Cabarrus, Davidson, Iredell
Rutherford County-Marchman Field (FQD)	Rutherford, Polk, McDowell
Shelby - Cleveland County Regional (EHO)	Cleveland, Rutherford, Gaston, Lincoln
Siler City Municipal (5W8)	Chatham, Randolph
Smith-Reynolds (INT)	Forsyth, Stokes, Yadkin, Davie, Guilford, Davidson
Stanly County (VUJ)	Stanly, Mecklenburg, Cabarrus, Rowan, Davidson, Montgomery
Statesville Regional (SVH)	Iredell, Catawba, Davie, Alexander, Rowan
Tarboro-Edgecombe (ETC)	Edgecombe, Halifax, Martin
Triangle North Executive (LHZ)	Franklin, Wake
Tri-County (ASJ)	Hertford, Northampton, Bertie
Warren Field (OCW)	Beaufort, Pitt
Wayne Executive Jetport (GWW)	Wayne, Greene
Western Carolina Regional (RHP)	Cherokee, Graham, Clay
Wilkes County (UKF)	Wilkes
Wilmington International (ILM)	New Hanover, Brunswick, Pender, Columbus, Bladen, Onslow

APPENDIX B: RESULTS SORTED BY AIRPORT NAME

Airport ID and Name		City/Town	Total Output (dollars)	Total Employment (jobs)	Total Estimated Payroll Income (dollars)	Total State and Local Taxes (dollars)
Air Carrier Airports						
OAJ	Albert J. Ellis	Jacksonville	\$191,890,000	340	\$12,300,000	\$3,650,000
AVL	Asheville Regional	Asheville	\$473,760,000	1,700	\$41,470,000	\$11,118,000
CLT	Charlotte Douglas International	Charlotte	\$12,465,270,000	60,320	\$2,449,390,000	\$474,097,000
EWN	Coastal Carolina Regional	New Bern	\$167,180,000	360	\$13,090,000	\$3,159,000
FAY	Fayetteville Regional/Grannis Field	Fayetteville	\$318,810,000	740	\$22,530,000	\$6,929,000
GSO	Piedmont Triad International	Greensboro	\$1,890,150,000	7,770	\$285,550,000	\$51,983,000
PGV	Pitt-Greenville	Greenville	\$97,270,000	310	\$8,140,000	\$2,161,000
RDU	Raleigh-Durham International	Raleigh/Durham	\$7,799,870,000	20,550	\$714,710,000	\$147,950,000
ILM	Wilmington International	Wilmington	\$466,260,000	1,300	\$38,220,000	\$11,253,000
Air Carrier Subtotal			\$23,870,460,000	93,390	\$3,585,400,000	\$712,300,000
General Aviation Airports						
AFP	Anson County - Jeff Cloud Field	Wadesboro	\$10,690,000	30	\$1,180,000	\$170,000
GEV	Ashe County	Jefferson	\$32,980,000	220	\$6,150,000	\$668,000
HBI	Asheboro Regional	Asheboro	\$5,940,000	30	\$1,180,000	\$126,000
7A8	Avery County/Morrison Field	Spruce Pine	\$4,880,000	80	\$1,560,000	\$145,000
HSE	Billy Mitchell	Hatteras	\$1,760,000	10	\$90,000	\$43,000
BUY	Burlington-Alamance Regional	Burlington	\$71,850,000	550	\$22,380,000	\$2,017,000
SUT	Cape Fear Rgnl Jetport/Howie Franklin Fld	Oak Island	\$61,730,000	600	\$5,270,000	\$2,341,000
EQY	Charlotte-Monroe Executive	Monroe	\$22,260,000	150	\$5,400,000	\$571,000
CTZ	Clinton-Sampson County	Clinton	\$270,000	10	\$80,000	\$75,000
CPC	Columbus County Municipal	Whiteville	\$15,820,000	160	\$4,000,000	\$653,000
JQF	Concord Regional	Concord	\$175,790,000	1,980	\$73,650,000	\$7,865,000
ONX	Currituck County Regional	Currituck	\$10,060,000	40	\$2,160,000	\$254,000
EYF	Curtis L Brown, Jr. Field	Elizabethtown	\$7,270,000	30	\$1,110,000	\$262,000
MQI	Dare County Regional	Manteo	\$10,630,000	70	\$1,940,000	\$243,000

Airport ID and Name		City/Town	Total Output (dollars)	Total Employment (jobs)	Total Estimated Payroll Income (dollars)	Total State and Local Taxes (dollars)
EXX	Davidson County	Lexington	\$10,320,000	110	\$3,020,000	\$713,000
DPL	Duplin County	Kenansville	\$25,700,000	140	\$5,130,000	\$488,000
ECG	Elizabeth City CG Air Station/Regional	Elizabeth City	\$144,010,000	510	\$22,000,000	\$2,025,000
ZEF	Elkin Municipal	Elkin	\$4,310,000	10	\$320,000	\$118,000
FFA	First Flight	Kill Devil Hills	\$3,780,000	10	\$80,000	\$8,000
MRN	Foothills Regional	Morganton	\$3,270,000	10	\$70,000	\$74,000
AKH	Gastonia Municipal	Gastonia	\$6,340,000	30	\$1,050,000	\$162,000
IXA	Halifax - Northampton Regional	Roanoke Rapids	\$10,190,000	30	\$990,000	\$377,000
HRJ	Harnett Regional Jetport	Erwin	\$87,920,000	360	\$16,370,000	\$1,622,000
ACZ	Henderson Field	Wallace	\$6,430,000	20	\$380,000	\$59,000
HNZ	Henderson-Oxford	Oxford	\$5,280,000	10	\$110,000	\$50,000
HKY	Hickory Regional	Hickory	\$16,740,000	70	\$2,060,000	\$553,000
7W6	Hyde County	Englehard	\$430,000	<10	\$-	\$-
24A	Jackson County	Sylva	\$430,000	10	\$120,000	\$23,000
JNX	Johnston County	Smithfield	\$62,600,000	500	\$17,670,000	\$4,108,000
ISO	Kinston Regional Jetport at Stallings Field	Kinston	\$219,370,000	1,230	\$46,340,000	\$5,756,000
MEB	Laurinburg-Maxton	Maxton	\$42,810,000	510	\$11,820,000	\$1,378,000
IPJ	Lincolnton-Lincoln County Regional	Lincolnton	\$10,090,000	60	\$1,730,000	\$261,000
LBT	Lumberton Municipal	Lumberton	\$6,100,000	40	\$740,000	\$128,000
1A5	Macon County	Franklin	\$4,490,000	40	\$750,000	\$248,000
MCZ	Martin County	Williamston	\$980,000	10	\$120,000	\$14,000
MRH	Michael J Smith Field	Beaufort	\$7,190,000	60	\$1,410,000	\$285,000
43A	Montgomery County	Star	\$1,410,000	10	\$240,000	\$31,000
SOP	Moore County	Pinehurst/Southern Pines	\$35,240,000	260	\$9,590,000	\$1,012,000
MWK	Mt Airy/Surry County	Mount Airy	\$222,030,000	1,940	\$41,420,000	\$5,369,000
W40	Mt Olive Municipal	Mount Olive	\$8,000,000	60	\$2,210,000	\$234,000

Airport ID and Name		City/Town	Total Output (dollars)	Total Employment (jobs)	Total Estimated Payroll Income (dollars)	Total State and Local Taxes (dollars)
EDE	Northeastern Regional	Edenton	\$2,570,000	10	\$20,000	\$29,000
W95	Ocracoke Island	Ocracoke	\$1,930,000	20	\$290,000	\$60,000
60J	Odell Williamson Municipal	Ocean Isle Beach	\$2,170,000	10	\$80,000	\$14,000
TDF	Person County	Roxboro	\$9,590,000	10	\$100,000	\$33,000
PMZ	Plymouth Municipal	Plymouth	\$1,930,000	20	\$270,000	\$75,000
TTA	Raleigh Exec Jetport at Sanford-Lee County	Sanford	\$32,170,000	300	\$9,690,000	\$1,099,000
RCZ	Richmond County	Rockingham	\$2,600,000	10	\$150,000	\$23,000
SIF	Rockingham County/NC Shiloh	Reidsville	\$3,860,000	10	\$310,000	\$77,000
RWI	Rocky Mount-Wilson Regional	Rocky Mount	\$19,100,000	140	\$4,850,000	\$455,000
RUQ	Rowan County	Salisbury	\$103,350,000	670	\$20,580,000	\$2,132,000
FQD	Rutherford County-Marchman Field	Rutherfordton	\$3,030,000	20	\$180,000	\$104,000
EHO	Shelby - Cleveland County Regional	Shelby	\$15,130,000	160	\$4,620,000	\$1,158,000
5W8	Siler City Municipal	Siler City	\$8,730,000	20	\$680,000	\$86,000
INT	Smith-Reynolds	Winston-Salem	\$195,550,000	2,420	\$68,180,000	\$6,678,000
VUJ	Stanly County	Albemarle	\$109,700,000	710	\$26,920,000	\$2,398,000
SVH	Statesville Regional	Statesville	\$21,090,000	200	\$5,480,000	\$1,294,000
ETC	Tarboro-Edgecombe	Tarboro	\$560,000	10	\$60,000	\$8,000
LHZ	Triangle North Executive	Louisburg	\$23,840,000	160	\$5,640,000	\$771,000
ASJ	Tri-County	Ahoskie	\$3,450,000	10	\$180,000	\$53,000
OCW	Warren Field	Washington	\$3,710,000	30	\$880,000	\$105,000
GWW	Wayne Executive Jetport	Goldsboro	\$26,100,000	250	\$9,590,000	\$956,000
RHP	Western Carolina Regional	Andrews	\$17,280,000	180	\$4,110,000	\$468,000
UKF	Wilkes County	North Wilkesboro	\$20,910,000	90	\$3,860,000	\$670,000
General Aviation Subtotal			\$2,005,740,000	15,460	\$478,600,000	\$59,275,000
Total			\$25,876,200,000	108,850	\$4,064,000,000	\$771,575,000