2012 Economic Contribution of Airports in North Carolina

DIVISION OF AVIATION
NORTH CAROLINA DEPARTMENT OF TRANSPORTATION

108,850 JOBS ARE SUPPORTED BY 72 PUBLICLY OWNED AIRPORTS THROUGHOUT NORTH CAROLINA

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Aviation's Impact On North Carolina's Emerging Economies

North Carolina's integrated system of airports provides connectivity between North Carolina and global markets, connecting people and businesses around the world. Linking the global economy with North Carolina generates economic activity, commerce and tourism. The North Carolina Department of Transportation's Division of Aviation supports 9 commercial air carrier airports and 63 general aviation airports that provide tremendous economic contributions to our state, including:

- 108,850 aviation related jobs;
- $26 billion annual impact; and
- $771 million in direct government revenue.

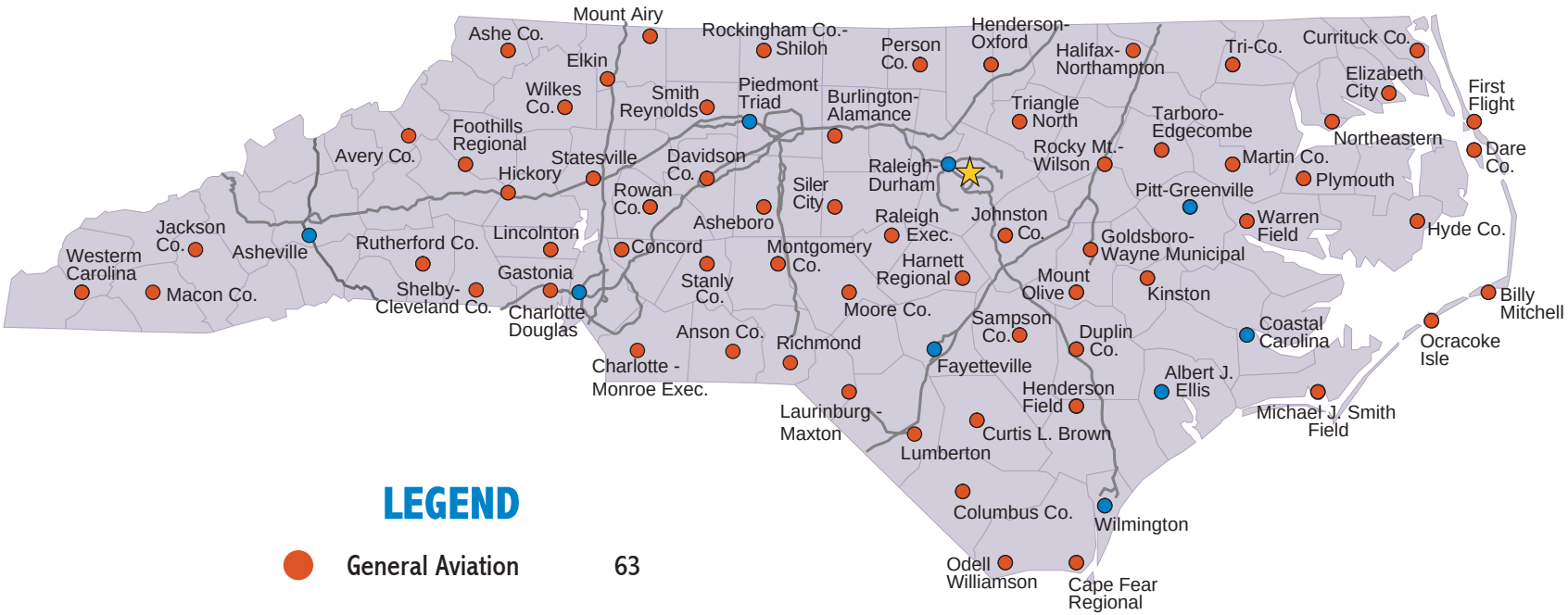
North Carolina aviation serves everyone in our state. Aviation's reach extends far beyond pilots and operators. Its influence includes:

- Movement of people, both corporate and passenger;
- Movement of time-sensitive, high-value cargo and freight;
- Tourism;
- Flight training;
- Agriculture;
- Aerospace industry;
- Military; and
- First responders;
    - Medical;
    - Disaster relief;
    - Fire fighting.

A robust network of airports serves *everyone* in North Carolina.

$26 BILLION ANNUAL ECONOMIC CONTRIBUTION

The 72 North Carolina public use airports consist of 9 commercial air carrier airports and 63 general aviation airports. They provide outstanding economic impact to our state and region. With our rich aviation heritage and continued investment in aviation, North Carolina is uniquely positioned to be a leader in the aerospace industry, air traffic management, and aviation-driven commerce.



LEGEND

General Aviation	63
Commercial Aviation	9
Interstate Highways	

The impacts generated from each airport are tabulated by group on pages 10 and 11.

How Does Aviation Contribute to the Economy?

"As North Carolina continues its investment into aviation infrastructure, more and more aerospace companies are calling North Carolina home with new manufacturing facilities."

— *Richard Walls, NCDOT Director of Aviation*

North Carolina airports serve as an economic catalyst for communities across the state. They contribute to the state's economy primarily through three categories: direct, indirect and induced 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 direct- and indirect-related firms that produce successive spending (money recirculated in an economy resulting in additional economic activity).

The contributions for North Carolina's robust aviation system came from detailed analysis of airports, airport tenants and major users.

DIRECT = Airport Jobs

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INDIRECT = Airport Suppliers

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INDUCED = Salary Spending

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"Every branch of our military operates within North Carolina and utilizes our extensive aviation system for training and mobility. North Carolina prides itself on being the most military friendly state in the country, and it is great to see a strong partnership between our military and the NCDOT Division of Aviation."

— *Retired U.S. Army Major General Hugh Overholt*

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Vital Services for U.S. Military Operations and Communities

Military aircraft operations are conducted by all members of the United States armed forces, with the Air Force, Army, Navy, Marines, Coast Guard and N.C. National Guard all conducting major operations in our state. In 2011, there were approximately 200,000 recorded military aircraft operations at public access airports across our statewide aviation system. These military operations are vital for national security and troop readiness, and complements our system of airports. Key military aviation locations include:

- Fort Bragg Army Base, Fayetteville;
- Seymour Johnson Air Force Base, Goldsboro;
- Marine Corps Air Station Cherry Point, Havelock;
- Marine Corps Air Station New River, Jacksonville;
- Elizabeth City Coast Guard Air Station; and
- N.C. National Guard
    - 145th Airlift Wing, Charlotte and Stanly County;
    - Raleigh-Durham; and
    - Rowan County.

Military presence at local airports provides an economic benefit to the community. Military personnel support local jobs by purchasing fuel for aircraft, as well as visiting local businesses for meals, accommodations and supplies. A 2010 study of N.C. National Guard activities at Charlotte Douglas International Airport and the Stanly County Airport found an annual economic impact on local communities of $72 million. In addition, military activity also has attracted private defense companies to the state who locate near military facilities to provide support services.

"The airport is a huge factor in reaching clients and closing deals. It is absolutely vital to our business. Whether or not we can reach a customer by plane ultimately helps us decide on pursuing a project."

— *John Stewart, Software Developer, Charlotte-Monroe Executive Airport*

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Aviation Means Business

Recent studies have shown the importance of airports in the attraction and retention of businesses in local communities. Commercial and general aviation airports are closely evaluated when a business examines sites for new manufacturing operations and corporate headquarters. Communities with access to aviation services are at a significant advantage as airports mean access to global markets and connectivity to people and goods. In a 21st century economy based on high-tech manufacturing jobs, the ability to move time-sensitive, high-value cargo throughout North Carolina is critical.

Since the last aviation economic impact study in 2006, North Carolina aviation boasted an 18.8 percent increase in the number of aviation jobs and an additional $14 billion in annual economic impact. The partnership between North Carolina aviation and business communities continues to grow. North Carolina aviation continues to grow thriving "**Aerotropolises**," where the link between economic growth and aerospace companies come together to stimulate a strong local economy. "Aerotropolises" are emerging at numerous locations around the state, including:

- Global TransPark, Kinston;
- Monroe Executive Jetport;
- Piedmont Triad International Airport, Greensboro; and
- Elizabeth City Coast Guard Air Station/Regional Airport.

With a $90 million rail distribution hub project, the Charlotte Douglas International Airport will unite aviation, rail and highways at one location to provide a multimodal means for moving goods, and will become a regional distribution center for the entire East Coast.

Aviation's Contribution Data

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ECONOMIC CONTRIBUTION ANNUALLY

Contribution Type	Commercial Aviation	General Aviation (GA)	Total
Direct	$6,999,550,000	$1,188,340,000	$8,187,890,000
Indirect	$7,440,010,000	$382,660,000	$7,822,670,000
Induced	$9,430,900,000	$434,740,000	$9,865,640,000
Total	*$23,870,460,000*	*$2,005,740,000*	*$25,876,200,000*

JOBS CONTRIBUTION

Commercial	GA	Total
29,930	7,220	37,150
42,460	5,510	47,970
21,000	2,730	23,730
93,390	*15,460*	*108,850*

COMMERCIAL

Commercial Airport ID and Name		City/Town	Output (dollars)				Employment (jobs)		Estimated Payroll Income (dollars)		Total State and Local Taxes (dollars)
			Direct	Indirect	Induced	Total	Direct	Total	Direct	Total	
OAJ	Albert J. Ellis	Jacksonville	$37,250,000	$90,430,000	$64,210,000	$191,890,000	170	340	$8,800,000	$12,300,000	$3,650,000
AVL	Asheville Regional	Asheville	$107,570,000	$203,780,000	$162,410,000	$473,760,000	750	1,700	$22,810,000	$41,470,000	$11,118,000
CLT	Charlotte Douglas International	Charlotte	$4,650,190,000	$3,403,590,000	$4,411,490,000	$12,465,270,000	17,890	60,320	$1,372,820,000	$2,449,390,000	$474,097,000
EWN	Coastal Carolina Regional	New Bern	$32,100,000	$73,770,000	$61,310,000	$167,180,000	150	360	$8,740,000	$13,090,000	$3,159,000
FAY	Fayetteville Regional/Grannis Field	Fayetteville	$69,120,000	$148,600,000	$101,090,000	$318,810,000	380	740	$14,410,000	$22,530,000	$6,929,000
GSO	Piedmont Triad International	Greensboro	$527,890,000	$557,360,000	$804,900,000	$1,890,150,000	2,440	7,770	$160,530,000	$285,550,000	$51,983,000
PGV	Pitt-Greenville	Greenville	$21,380,000	$43,420,000	$32,470,000	$97,270,000	150	310	$4,600,000	$8,140,000	$2,161,000
RDU	Raleigh-Durham International	Raleigh/Durham	$1,444,760,000	$2,698,170,000	$3,656,940,000	$7,799,870,000	7,390	20,550	$397,580,000	$714,710,000	$147,950,000
ILM	Wilmington International	Wilmington	$109,290,000	$220,890,000	$136,080,000	$466,260,000	610	1,300	$22,220,000	$38,220,000	$11,253,000
		AIR CARRIER TOTAL	$6,999,550,000	$7,440,010,000	$9,430,900,000	$23,870,460,000	29,930	93,390	$2,012,510,000	$3,585,400,000	$712,300,000

General Aviation Airport ID and Name		City/Town	Output (dollars)				Employment (jobs)		Estimated Payroll Income (dollars)		Total State and Local Taxes
			Direct	Indirect	Induced	Total	Direct	Total	Direct	Total	
AFP	Anson County - Jeff Cloud Field	Wadesboro	$8,360,000	$1,380,000	$950,000	$10,690,000	10	30	$790,000	$1,180,000	$170,000
GEV	Ashe County	Jefferson	$23,890,000	$4,750,000	$4,340,000	$32,980,000	110	220	$4,060,000	$6,150,000	$668,000
HBI	Asheboro Regional	Asheboro	$1,220,000	$1,560,000	$3,160,000	$5,940,000	10	30	$740,000	$1,180,000	$126,000
7A8	Avery County/Morrison Field	Spruce Pine	$2,350,000	$1,100,000	$1,430,000	$4,880,000	50	80	$1,170,000	$1,560,000	$145,000
HSE	Billy Mitchell	Hatteras	$400,000	$980,000	$380,000	$1,760,000	<10	10	$40,000	$90,000	$43,000
BUY	Burlington-Alamance Regional	Burlington	$36,260,000	$12,440,000	$23,150,000	$71,850,000	180	550	$13,730,000	$22,380,000	$2,017,000
SUT	Cape Fear Rgnl Jetport/Howie Franklin Fld.	Oak Island	$26,210,000	$15,700,000	$19,820,000	$61,730,000	290	600	$3,360,000	$5,270,000	$2,341,000
EQY	Charlotte-Monroe Executive	Monroe	$6,660,000	$6,330,000	$9,270,000	$22,260,000	70	150	$3,230,000	$5,400,000	$571,000
CPC	Columbus County Municipal	Whiteville	$9,070,000	$3,200,000	$3,550,000	$15,820,000	100	160	$2,900,000	$4,000,000	$653,000
JQF	Concord Regional	Concord	$77,250,000	$36,650,000	$61,890,000	$175,790,000	900	1,980	$45,070,000	$73,650,000	$7,865,000
ONX	Currituck County Regional	Currituck	$2,950,000	$3,000,000	$4,110,000	$10,060,000	20	40	$1,690,000	$2,160,000	$254,000
EYF	Curtis L. Brown, Jr. Field	Elizabethtown	$2,140,000	$2,280,000	$2,850,000	$7,270,000	10	30	$890,000	$1,110,000	$262,000
MQI	Dare County Regional	Manteo	$3,130,000	$3,270,000	$4,230,000	$10,630,000	40	70	$1,390,000	$1,940,000	$243,000
EXX	Davidson County	Lexington	$6,390,000	$1,970,000	$1,960,000	$10,320,000	60	110	$2,200,000	$3,020,000	$713,000
DPL	Duplin County	Kenansville	$15,370,000	$7,500,000	$2,830,000	$25,700,000	70	140	$2,820,000	$5,130,000	$488,000
ECG	Elizabeth City CG Air Station/Regional	Elizabeth City	$123,140,000	$8,080,000	$12,790,000	$144,010,000	230	510	$16,710,000	$22,000,000	$2,025,000
ZEF	Elkin Municipal	Elkin	$1,700,000	$1,120,000	$1,490,000	$4,310,000	<10	10	$240,000	$320,000	$118,000
FFA	First Flight	Kill Devil Hills	$330,000	$2,640,000	$810,000	$3,780,000	<10	10	$40,000	$80,000	$8,000
MRN	Foothills Regional	Morganton	$90,000	$1,270,000	$1,910,000	$3,270,000	<10	10	$50,000	$70,000	$74,000
AKH	Gastonia Municipal	Gastonia	$1,110,000	$2,050,000	$3,180,000	$6,340,000	10	30	$630,000	$1,050,000	$162,000
IXA	Halifax - Northampton Regional	Roanoke Rapids	$4,220,000	$3,740,000	$2,230,000	$10,190,000	20	30	$720,000	$990,000	$377,000
HRJ	Harnett Regional Jetport	Erwin	$66,880,000	$11,790,000	$9,250,000	$87,920,000	140	360	$11,830,000	$16,370,000	$1,622,000
ACZ	Henderson Field	Wallace	$560,000	$1,760,000	$4,110,000	$6,430,000	10	20	$320,000	$380,000	$59,000
HNZ	Henderson-Oxford	Oxford	$190,000	$2,260,000	$2,830,000	$5,280,000	<10	10	$90,000	$110,000	$50,000
HKY	Hickory Regional	Hickory	$5,190,000	$6,060,000	$5,490,000	$16,740,000	30	70	$1,310,000	$2,060,000	$553,000
7W6	Hyde County	Englehard	*	$430,000	*	$430,000	<10	<10	*	*	*
24A	Jackson County	Sylva	$230,000	$80,000	$120,000	$430,000	<10	10	$90,000	$120,000	$23,000
JNX	Johnston County	Smithfield	$38,620,000	$10,530,000	$13,450,000	$62,600,000	180	500	$9,870,000	$17,670,000	$4,108,000
ISO	Kinston Regional Jetport at Stallings Field	Kinston	$166,870,000	$24,060,000	$28,440,000	$219,370,000	550	1,230	$31,730,000	$46,340,000	$5,756,000
MEB	Laurinburg-Maxton	Maxton	$27,630,000	$5,530,000	$9,650,000	$42,810,000	350	510	$9,010,000	$11,820,000	$1,378,000
IPJ	Lincolnton-Lincoln County Regional	Lincolnton	$2,680,000	$3,210,000	$4,200,000	$10,090,000	30	60	$1,140,000	$1,730,000	$261,000
LBT	Lumberton Municipal	Lumberton	$1,180,000	$2,050,000	$2,870,000	$6,100,000	20	40	$550,000	$740,000	$128,000
1A5	Macon County	Franklin	$2,150,000	$1,440,000	$900,000	$4,490,000	20	40	$440,000	$750,000	$248,000
MCZ	Martin County	Williamston	$330,000	$430,000	$220,000	$980,000	<10	10	$90,000	$120,000	$14,000
MRH	Michael J Smith Field	Beaufort	$3,190,000	$2,110,000	$1,890,000	$7,190,000	30	60	$980,000	$1,410,000	$285,000
43A	Montgomery County	Star	$290,000	$280,000	$840,000	$1,410,000	<10	10	$200,000	$240,000	$31,000
SOP	Moore County	Pinehurst/Southern Pines	$22,950,000	$6,670,000	$5,620,000	$35,240,000	120	260	$6,590,000	$9,590,000	$1,012,000
MWK	Mount Airy/Surry County	Mount Airy	$178,880,000	$23,640,000	$19,510,000	$222,030,000	1,270	1,940	$29,120,000	$41,420,000	$5,369,000
W40	Mount Olive Municipal	Mount Olive	$4,150,000	$1,710,000	$2,140,000	$8,000,000	30	60	$1,550,000	$2,210,000	$234,000
EDE	Northeastern Regional	Edenton	$50,000	$1,260,000	$1,260,000	$2,570,000	<10	10	$20,000	$20,000	$29,000
W95	Ocracoke Island	Ocracoke	$750,000	$620,000	$560,000	$1,930,000	10	20	$240,000	$290,000	$60,000
60J	Odell Williamson Municipal	Ocean Isle Beach	$100,000	$690,000	$1,380,000	$2,170,000	<10	10	$60,000	$80,000	$14,000
TDF	Person County	Roxboro	$110,000	$3,160,000	$6,320,000	$9,590,000	<10	10	$70,000	$100,000	$33,000
PMZ	Plymouth Municipal	Plymouth	$510,000	$640,000	$780,000	$1,930,000	10	20	$210,000	$270,000	$75,000
TTA	Raleigh Exec Jetport at Sanford-Lee County	Sanford	$13,480,000	$9,760,000	$8,930,000	$32,170,000	110	300	$4,640,000	$9,690,000	$1,099,000
RCZ	Richmond County	Rockingham	$210,000	$870,000	$1,520,000	$2,600,000	<10	10	$110,000	$150,000	$23,000
SIF	Rockingham County/NC Shiloh	Reidsville	$460,000	$1,700,000	$1,700,000	$3,860,000	<10	10	$160,000	$310,000	$77,000
RWI	Rocky Mount-Wilson Regional	Rocky Mount	$6,300,000	$5,020,000	$7,780,000	$19,100,000	60	140	$3,340,000	$4,850,000	$455,000
RUQ	Rowan County	Salisbury	$66,770,000	$23,680,000	$12,900,000	$103,350,000	270	670	$11,750,000	$20,580,000	$2,132,000
FQD	Rutherford County-Marchman Field	Rutherfordton	$370,000	$1,250,000	$1,410,000	$3,030,000	10	20	$130,000	$180,000	$104,000
CTZ	Sampson County	Clinton	$150,000	$90,000	$30,000	$270,000	<10	10	$60,000	$80,000	$75,000
EHO	Shelby - Cleveland County Regional	Shelby	$7,720,000	$3,010,000	$4,400,000	$15,130,000	90	160	$3,330,000	$4,620,000	$1,158,000
5W8	Siler City Municipal	Siler City	$970,000	$2,930,000	$4,830,000	$8,730,000	10	20	$530,000	$680,000	$86,000
INT	Smith-Reynolds	Winston-Salem	$96,760,000	$46,400,000	$52,390,000	$195,550,000	1,040	2,420	$33,390,000	$68,180,000	$6,678,000
VUJ	Stanly County	Albemarle	$60,260,000	$33,530,000	$15,910,000	$109,700,000	190	710	$10,120,000	$26,920,000	$2,398,000
SVH	Statesville Regional	Statesville	$9,760,000	$5,320,000	$6,010,000	$21,090,000	110	200	$3,540,000	$5,480,000	$1,294,000
ETC	Tarboro-Edgecombe	Tarboro	$60,000	$470,000	$30,000	$560,000	<10	10	$50,000	$60,000	$8,000
LHZ	Triangle North Executive	Louisburg	$7,910,000	$5,620,000	$10,310,000	$23,840,000	70	160	$3,340,000	$5,640,000	$771,000
ASJ	Tri-County	Ahoskie	$280,000	$1,220,000	$1,950,000	$3,450,000	<10	10	$140,000	$180,000	$53,000
OCW	Warren Field	Washington	$1,100,000	$940,000	$1,670,000	$3,710,000	10	30	$610,000	$880,000	$105,000
GWW	Wayne Executive Jetport	Goldsboro	$12,340,000	$4,120,000	$9,640,000	$26,100,000	120	250	$7,130,000	$9,590,000	$956,000
RHP	Western Carolina Regional	Andrews	$11,060,000	$3,240,000	$2,980,000	$17,280,000	110	180	$2,860,000	$4,110,000	$468,000
UKF	Wilkes County	North Wilkesboro	$16,650,000	$2,070,000	$2,190,000	$20,910,000	40	90	$2,910,000	$3,860,000	$670,000
		GENERAL AVIATION TOTAL	$1,188,340,000	$382,660,000	$434,740,000	$2,005,740,000	7,220	15,460	$296,120,000	$478,600,000	$59,275,000
		COMBINED TOTAL	***$8,187,890,000***	***$7,822,670,000***	***$9,865,640,000***	***$25,876,200,000***	***37,150***	***108,850***	***$2,308,630,000***	***$4,064,000,000***	***$771,575,000***

* At the time of this study, the Hyde County Airport had no based aircraft nor directly related jobs.

Airports in North Carolina provide $26 billion annually in economic impact and support 108,850 jobs across the state.

For more information:

N.C. Department of Transportation
Division of Aviation
1560 Mail Service Center
Raleigh, North Carolina 27699-1560

To download a copy of this booklet and the full report, visit www.ncdot.gov/aviation

NCDOT Division of Aviation Mission Statement

To promote the economic well-being of North Carolina through air transportation system development and improved aviation safety and education.

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