



NORTH CAROLINA
Department of Transportation

North Carolina: The State of Aviation 2023

Pre-release Briefing for Airport Managers

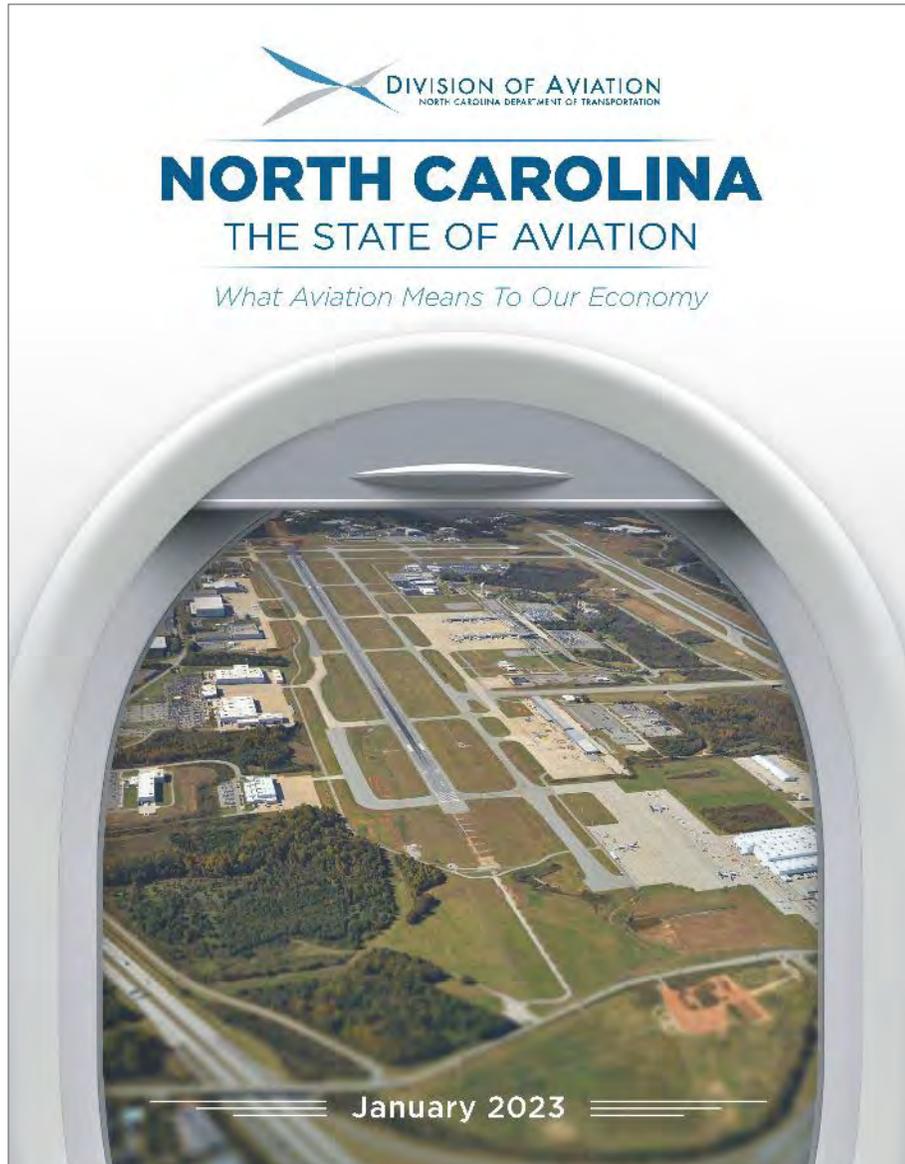
Bobby L. Walston, NCDOT Division of Aviation

Daniel Findley, Ph.D., NCSU Institute for Transportation Research & Education

Marcus Thompson, NCDOT Communications

January 6, 2023

Connecting people, products and places safely and efficiently with customer focus, accountability and environmental sensitivity to enhance the economy and vitality of North Carolina



AGENDA

- Welcome & Key Findings – Bobby Walston
- Methodology – Daniel Findley
- Promoting Your Impacts Locally – Marcus Thompson
- Q&A – Bobby Walston

Key Findings: \$72 Billion N.C. Airport Economic Impact Annually – 11% of North Carolina’s GDP

Report findings embargoed until Monday Jan. 9, 8 a.m.



Report Highlights N.C. Airport Impacts



Economic impacts of North Carolina airports

Coastal Carolina Regional Airport in New Bern opened a \$5.8 billion aircraft rescue and firefighting facility in 2021.

ANNUAL ECONOMIC IMPACTS				
AIRPORT TYPE	JOBS	PERSONAL INCOME	STATE AND LOCAL TAXES	ECONOMIC OUTPUT
Commercial Service	297,905	\$20,980,160,000	\$3,386,717,000	\$66,105,320,000
General Aviation	28,385	\$1,887,410,000	\$285,010,000	\$6,184,830,000
TOTAL	326,290	\$22,867,570,000	\$3,671,727,000	\$72,290,150,000

COMMERCIAL SERVICE AIRPORT IMPACTS					
AIRPORT AND NAME	CITY/TOWN	JOBS	PERSONAL INCOME	STATE AND LOCAL TAXES	ECONOMIC OUTPUT
DAW Albert J. Ellis	Jacksonville	5,400	\$278,600,000	\$44,871,000	\$707,470,000
AVL Asheville Regional	Asheville	10,559	\$121,445,000	\$18,401,000	\$2,275,270,000
CLT Charlotte Douglas International	Charlotte	19,579	\$8,905,409,000	\$1,019,390,000	\$31,772,940,000
DWN Coastal Carolina Regional	New Bern	2,463	\$168,310,000	\$20,931,000	\$512,650,000
JGT Raleigh-Durham Regional	Raleigh	4,439	\$284,160,000	\$46,205,000	\$899,820,000
FDY Fayetteville Regional	Fayetteville	3,665	\$258,280,000	\$38,579,000	\$812,880,000
FDX Piedmont Triad International	Greensboro	21,750	\$3,043,045,000	\$384,050,000	\$9,305,960,000
PSW Pitt-Spartanburg	Greenville	1,276	\$87,880,000	\$14,208,000	\$266,900,000
RDU Raleigh-Durham International	Raleigh/Durham	85,460	\$5,440,640,000	\$687,725,000	\$17,012,380,000
ILM Wilmington International	Wilmington	15,563	\$922,410,000	\$112,987,000	\$2,539,060,000
TOTAL	297,905	\$20,980,160,000	\$3,386,717,000	\$66,105,320,000	

Impact Analysis Methodology

North Carolina State University's Institute for Transportation Research and Education (ITRE) analyzed data from 2021, the most recent year complete data is available, primarily provided by North Carolina's 77 public service airports and the Federal Aviation Administration. ITRE used the IMPLAN model to compute economic impact.

The commercial service airport analysis quantified the impacts of leisure and business travelers to North Carolina and business travelers from North Carolina, on-airport

contributions (jobs, income and spending by tenants such as airlines, rental car companies and airport security) and the impact of airport capital projects and operations (construction, facility maintenance and operational services).

The general aviation airport analysis quantified the impact of jobs supported by the airport directly, jobs supported by businesses that rely on the airport, and the impact of visitors.

GENERAL AVIATION AIRPORT IMPACTS					
AIRPORT AND NAME	CITY/TOWN	JOBS	PERSONAL INCOME	STATE AND LOCAL TAXES	ECONOMIC OUTPUT
ATP Asheville-Gilkey Coast Field	Weirden	85	\$4,330,000	\$507,000	\$8,130,000
CEV Ashe County	Jefferson	228	\$1,470,000	\$1,355,000	\$36,260,000
HL Asheville Regional	Asheville	120	\$6,445,000	\$1,042,000	\$8,020,000
7A8 Avery County/Morris Field	Sutton Place	185	\$8,770,000	\$740,000	\$27,680,000
HSE Billy Mitchell	Hatteras	25	\$2,100,000	\$1,295,000	\$6,090,000
DLY Durham-Albemarle Regional	Durham	1,000	\$62,640,000	\$8,458,000	\$240,140,000
SUI Cape Fear Regional Airport/Hovde Frank Field	Oak Island	2,082	\$126,870,000	\$8,750,000	\$376,620,000
COV Charlotte-Mecklenburg Executive	Norman	320	\$4,120,000	\$2,855,000	\$35,710,000
GPC Charlotte-Concord Municipal	Whitehall	886	\$5,585,000	\$3,577,000	\$17,170,000
DNK Charlotte County Regional	Smithwick	85	\$4,180,000	\$355,000	\$14,580,000
BYF Cabarrus County	High Point	52	\$4,080,000	\$750,000	\$21,520,000
MOI Dare County Regional	Marion	105	\$4,240,000	\$1,095,000	\$10,290,000
DDX Davidson County	Lexington	570	\$30,380,000	\$4,353,000	\$100,000,000
DPL Durham County	Randolph	80	\$3,440,000	\$648,000	\$70,000,000
EGS Elizabeth City Regional	Elizabeth City	3,625	\$203,970,000	\$19,832,000	\$327,300,000
ZPF Fkln Municipal	Fkln	55	\$7,740,000	\$506,000	\$11,600,000
TTA First Flight	First Flight	159	\$9,960,000	\$1,393,000	\$8,870,000
MRI Fayetteville Regional	Fayetteville	100	\$6,800,000	\$1,000,000	\$21,760,000
SKH Gaston Municipal	Gaston	50	\$3,800,000	\$480,000	\$21,570,000
FAA Greenville-Anderson Regional	Travelers Rest	175	\$5,680,000	\$1,170,000	\$18,740,000
HRH Harratt Regional Airport	Boonville	870	\$45,420,000	\$3,075,000	\$146,680,000
WZL Henderson Field	Wetters	90	\$5,100,000	\$495,000	\$16,500,000
HLZ Hoke Regional	Salisbury	80	\$4,970,000	\$797,000	\$18,000,000
HLV Hoke County	Robeson	80	\$1,340,000	\$2,082,000	\$99,480,000
WJW Hoke County	Trayner	5	\$650,000	\$67,000	\$295,000
2AA Jackson County	Elkin	20	\$1,350,000	\$170,000	\$3,810,000
JNX Johnston Regional	Smithfield	1,100	\$71,070,000	\$10,506,000	\$296,970,000
ISO Johnston Regional Airport of North Carolina Global Terminal	Greensboro	2,485	\$74,370,000	\$37,807,000	\$640,760,000
MEB Lenoir County	Waynesville	840	\$4,420,000	\$10,000,000	\$164,000,000
IRJ Lincoln-Lenoir County Regional	Lincolnton	165	\$1,280,000	\$98,000	\$26,560,000
LEF Lenoir County Municipal	Lenoir	140	\$6,480,000	\$526,000	\$20,450,000
UNV Macon County	Greenville	100	\$6,530,000	\$1,480,000	\$16,400,000
MDP Marion County	Wilmington	50	\$5,060,000	\$360,000	\$4,560,000
MHI McDowell County	Greenville	300	\$1,290,000	\$1,090,000	\$5,770,000
ITR Mecklenburg County	Charlotte	16	\$65,000	\$175,000	\$1,820,000
EDF Moore County	Swain	800	\$3,550,000	\$4,700,000	\$10,780,000
WVX Mount Airy/Sittly County	Mount Airy	2,150	\$1,820,000	\$9,890,000	\$28,800,000
W40 Mount Olive Municipal	Mount Olive	210	\$1,100,000	\$1,740,000	\$30,010,000
LDL North Carolina Regional	London	25	\$5,000,000	\$180,000	\$19,020,000
W95 Onslow Island	Onslow	20	\$1,100,000	\$181,000	\$1,410,000
UDJ Onslow County Municipal	Onslow	65	\$2,450,000	\$280,000	\$8,090,000
TDJ Orange-Piedmont Regional	Traverse	215	\$7,730,000	\$2,151,000	\$37,070,000
PDZ Orange County Municipal	Traverse	85	\$3,000,000	\$200,000	\$10,800,000
PDV Orange County Municipal	Traverse	130	\$4,000,000	\$3,060,000	\$30,000,000
BCZ Orange County	Traverse	30	\$5,480,000	\$320,000	\$5,100,000
W41 Orange County Municipal	Traverse	420	\$2,560,000	\$1,340,000	\$80,870,000
BDV Orange County Municipal	Traverse	120	\$6,300,000	\$2,730,000	\$75,900,000
KUS Orange County Regional	Traverse	75	\$4,040,000	\$1,340,000	\$19,490,000
EDG Orange County	Traverse	85	\$5,830,000	\$1,500,000	\$15,000,000
CDZ Orange County	Traverse	25	\$7,140,000	\$240,000	\$7,040,000
EDJ Orange County	Traverse	320	\$1,710,000	\$510,000	\$30,390,000
SDT Orange County	Traverse	45	\$7,340,000	\$434,000	\$10,750,000
IRI Orange County	Traverse	180	\$21,070,000	\$22,770,000	\$294,240,000
W42 Orange County	Traverse	565	\$48,880,000	\$6,770,000	\$187,870,000
EV4 Orange County	Traverse	875	\$45,370,000	\$7,090,000	\$144,000,000
ELC Orange County	Traverse	40	\$5,170,000	\$140,000	\$16,300,000
LEF Orange County	Traverse	250	\$10,280,000	\$1,000,000	\$28,000,000
W43 Orange County	Traverse	35	\$1,400,000	\$20,000	\$9,000,000
W44 Orange County	Traverse	150	\$8,500,000	\$750,000	\$25,400,000
W45 Orange County	Traverse	370	\$28,520,000	\$440,000	\$81,300,000
PHC Orange County	Traverse	350	\$20,070,000	\$3,360,000	\$57,210,000
UKP Orange County	Traverse	108	\$1,030,000	\$1,050,000	\$20,000,000
TOTAL	28,385	\$1,887,410,000	\$285,010,000	\$6,184,830,000	

Aviation Assets & Activity Showcased



1 Gary E. Hodges

Rocky-Mount Wilson Regional Airport cargo operation

- Airport Infrastructure
- Airport Activity
- Support Industries
- Aviation Sectors
- Aerospace Manufacturing
- Aerospace Maintenance, Repair and Overhaul
- Aviation Higher Education
- Uncrewed Aircraft Systems

Impact Study Methodology



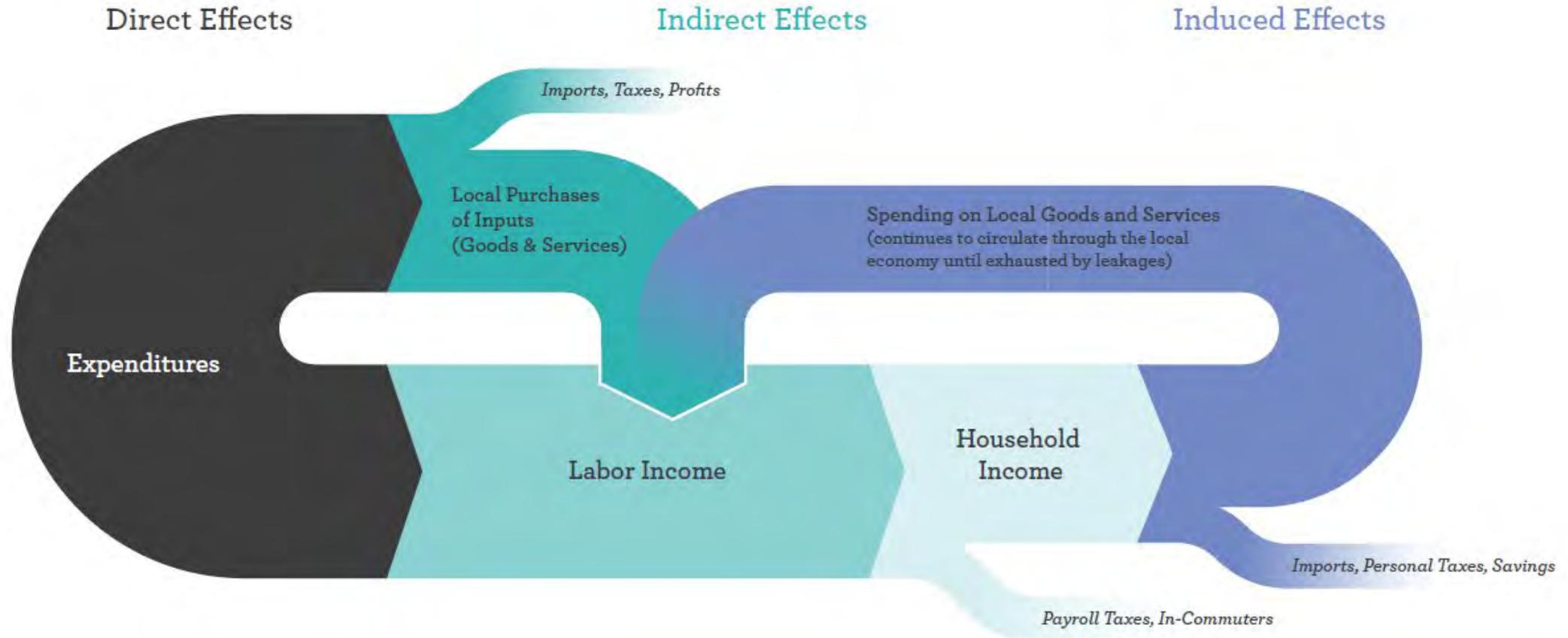
Concord-Padgett Regional Airport taxiway project

- Analysis based on 2021 airport data from airport surveys and Federal Aviation Administration
- Commercial service airport contributions based on:
 - Impacts of business and leisure travelers
 - On-airport jobs, income and spending by tenants
 - Spending on capital projects and operations
- General aviation airport analysis based on:
 - Jobs supported by the airport directly
 - Jobs supported by businesses that rely on the airport
 - Impact of visitors

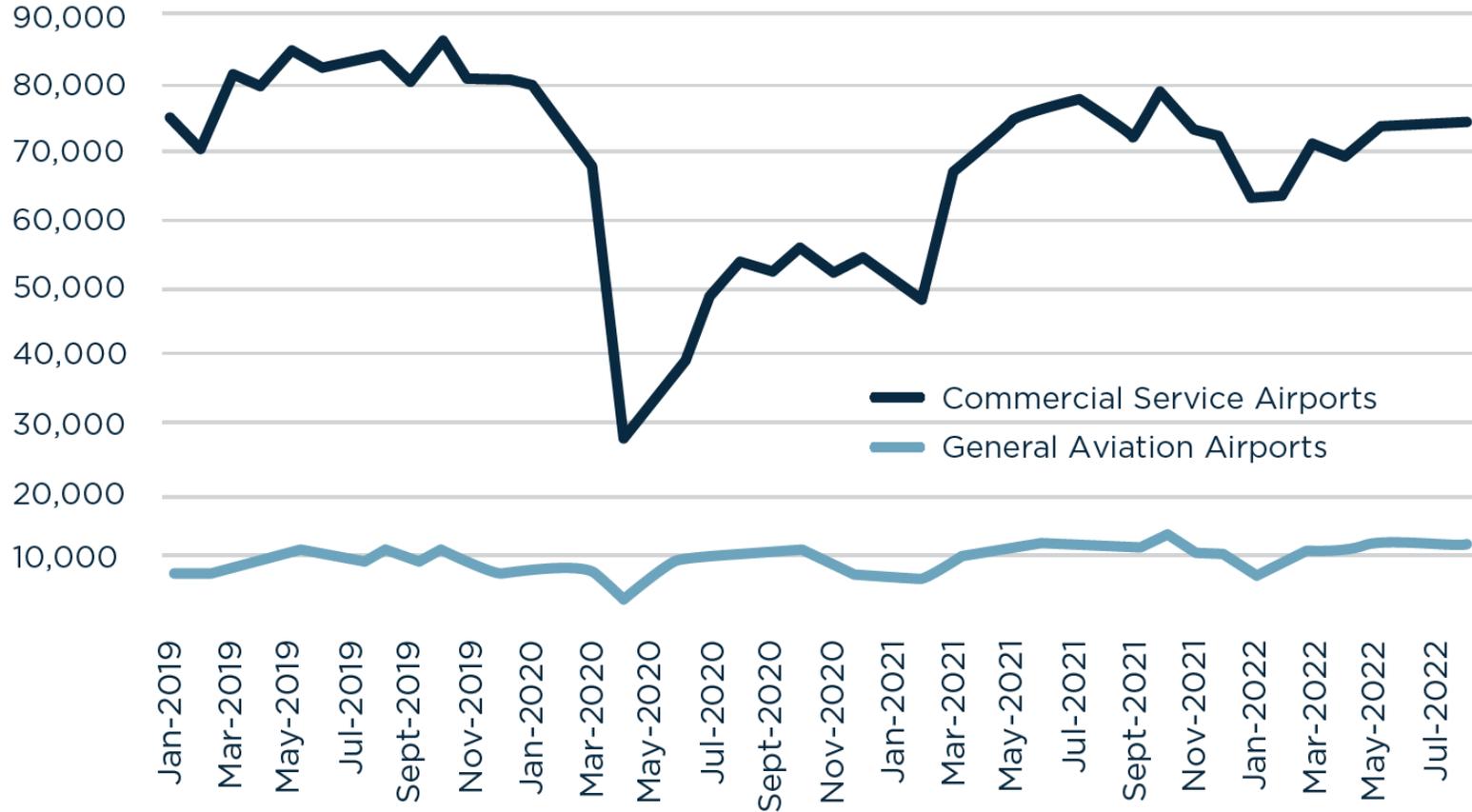
Crunching the Numbers



IMPLAN Economic Modeling Calculates Impacts Based on Airport and User Data



AIRPORT TAKEOFFS AND LANDINGS JAN. 2019-JULY 2022



- **Commercial service operations plummet during 2020 because of COVID impacts**
- **General aviation operations mostly hold steady due to private aircraft traffic**

Factors affecting airport economic impacts



Data quality

- Your survey responses make a huge difference!



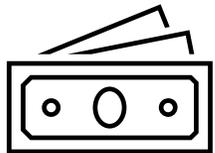
COVID

- Commercial passenger service fell sharply in 2020, rebounding in mid-2021



Methodology changes:

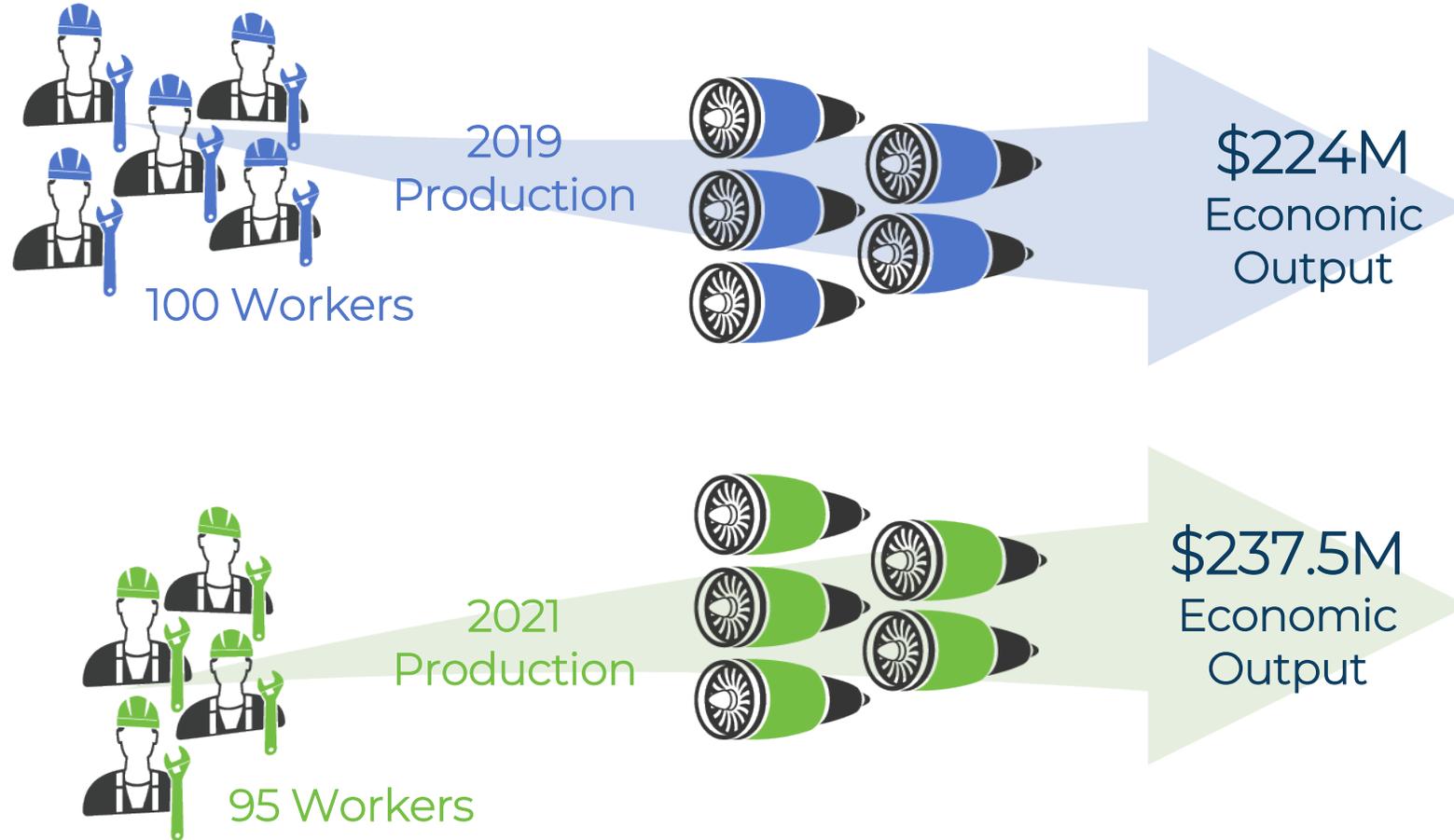
- Considered statewide impact of travelers/workers



Inflation (~11% Jan 2019-Dec 2021) and rising productivity

- Cost of jobs and services climbed despite job losses

With inflation and rising productivity, output can rise even when job numbers fall.



Example impact of inflation based on prices within N.C. manufacturing sector Jan 2019-Jan 2022. Output varies by sector.

2023 Outreach Campaign Launches Monday

Report your results on the Outreach Campaign Dashboard: tinyurl.com/2023AviationOutreachDashboard



Example NCDOT social media post

Friday, January 6

- Campaign toolkit distributed
- Airport managers briefed

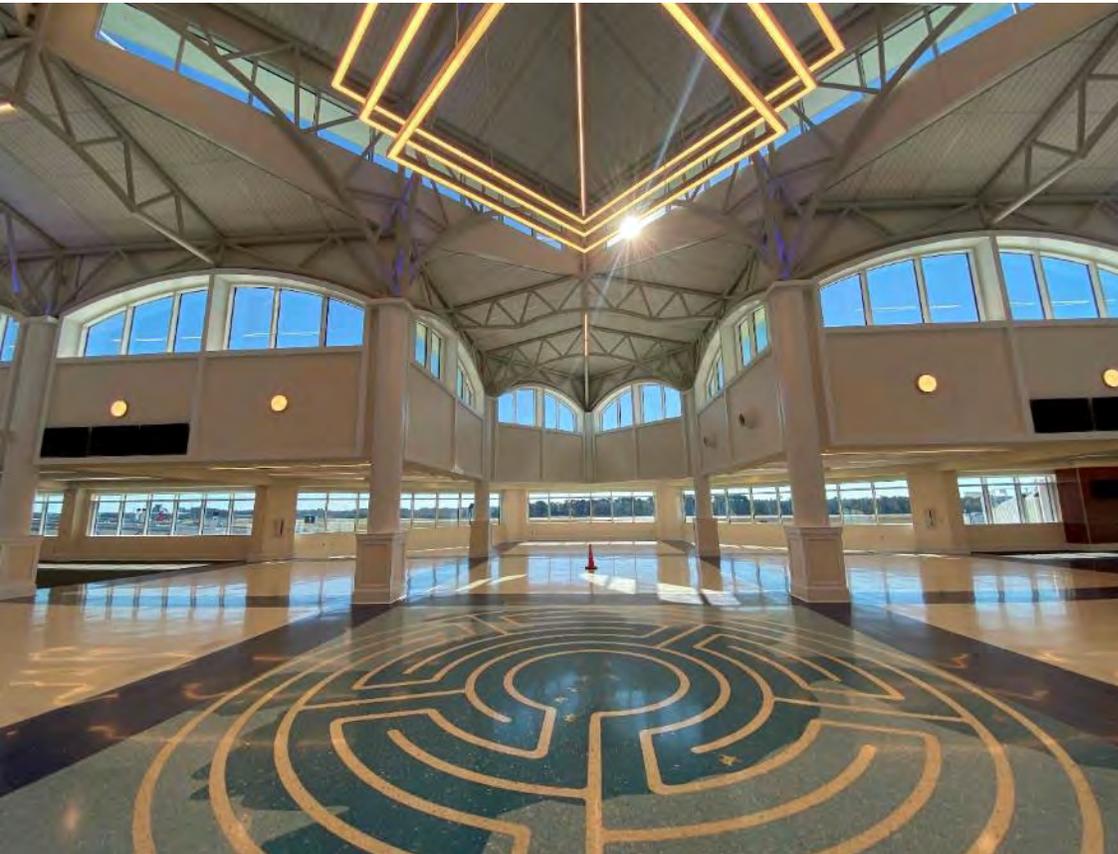
Monday, January 9

- Website goes live with report and related materials – see ncdot.gov/aviation banner for link
- Report released to media and stakeholder lists
- Social media campaign launches: #StateOfAviation

Ongoing

- 20 hard copies of the report mailed to airports in January
- Ongoing presentations and distribution to key stakeholders
- Social media campaign with posts on all 72 airports' impacts
- 2022 year-in-review airport projects slideshow

Key Airport Stakeholders



Wilmington International Airport terminal building

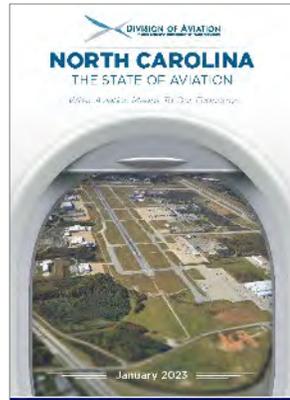
- N.C. General Assembly members and staff
- N.C.'s Congressional delegation and staff
- Economic development partners (city, county, private)
- Local government officials
- University and community college leadership
- Aviation- and aerospace-related companies and supply chains
- Drone community, public and private partners
- Flying public
- General public

Outreach Toolkit

REPORT & VIDEO: www.ncdot.gov/aviation

TOOLKIT: connect.ncdot.gov/municipalities/State-Airport-Aid/Pages/default.aspx

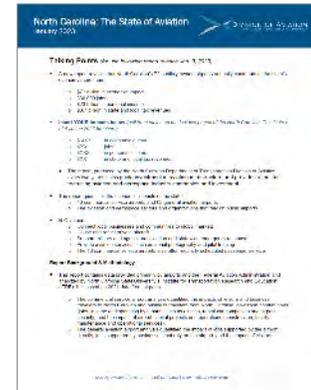
CONTACT: [Amanda Conner, aconner1@ncdot.gov](mailto:Amanda.Conner1@ncdot.gov)



Brochure



News Release



Talking Points



Airport Fact Sheets/Posters



Filed Flight Plans Data
go.ncsu.edu/ncairports



Customizable Presentation



State of Aviation Video

Promoting Airport Impacts Locally

North Carolina: The State of Aviation
January 2023

Talking Points (for use following report release Jan. 9, 2023)

- A new report reveals that North Carolina's 72 publicly owned airports annually contribute to the state's economy more than:
 - \$72 billion in economic impact
 - 330,000 jobs
 - \$23 billion in personal income
 - \$3.7 billion in state and local tax revenues
- **Insert YOUR impacts below** (pull from tables on the last two pages of the North Carolina: The State of Aviation 2023 brochure).

○ \$ XXX	in economic output
○ XXXX	jobs
○ \$XXX	in personal income
○ \$XX	in state and local tax revenues
- The report, produced by the North Carolina Department of Transportation Division of Aviation every two years, helps guide investment in aviation infrastructure and provides a tool for recruiting aviation and aerospace industry companies and investment.
- The report quantifies the economic impacts of the state's:
 - 10 commercial service airports and 62 general aviation airports
 - The aviation and aerospace sectors and organizations that rely on public airports
- N.C. airports:
 - Connect local businesses and communities to global markets
 - House and refuel private aircraft
 - Support military and agricultural aviation and statewide emergency response
 - Provide aviation services, such as aerial photography and pilot training
 - The 10 commercial service airports also offer regularly scheduled passenger service.

Report Background & Methodology

- This report contains data provided primarily by airports and the Federal Aviation Administration and analyzed by North Carolina State University's Institute for Transportation Research and Education (ITRE). It is based on 2021 data from airports.
 - The commercial service airport analysis quantified the impacts of leisure and business travelers to North Carolina and business travelers from North Carolina, on-airport contributions (jobs, income and spending by tenants such as airlines, rental car companies and airport security) and the impact of airport capital projects and operations (construction, facility maintenance and operational services).
 - The general aviation airport analysis quantified the impact of jobs supported by the airport directly, jobs supported by businesses that rely on the airport, and the impact of visitors.

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Jan. 6

- Prepare your talking points (impact data, quote...)

Jan. 9

- Forward the report and news release to your contacts:
 - Board and government officials
 - Your aviation community
- Contact local media to alert them about the release
 - Provide your local impact figures
 - Be prepared to give them a quote and talk about where your key impacts come from
- Post on social media with the hashtag #StateOfAviation
- Post the report, video and fact sheet on your website home page or under an Economic Impact tab

Ongoing

- Seek out opportunities to present to key stakeholders
- Track campaign results on the Outreach Dashboard!

Example Filed Flight Plan Animation

Contact: Daniel_Findley@ncsu.edu



Capturing Campaign Reach and Impact

Track and view outreach results on the Campaign Dashboard at: tinyurl.com/2023SoADashboard

2023 State of Aviation Outreach Dashboard (View Only) : [smartsheet](#)



North Carolina: The State of Aviation 2023 Outreach Campaign Dashboard

SPREAD THE WORD: \$72B Billion Annual Impact

Follow the [link below](#) to track your outreach results:

1. Enter **each presentation** you make on your impacts.
2. Enter **each published story** (newspaper, TV, newsletter, etc.) that publicizes your impacts.

[Submit a presentation or published story >](#)

Results to Date

Presentations

1

Stakeholders Reached

100

Published Stories

0

Quicklinks

[Aviation Website with Brochure and Video >](#)

[Outreach Toolkit on State Aid Connect site >](#)

Presentations

Organization	Date of Presentation	Est Size of Audience	Group Presented To
NCDOT Aviation	01/06/23	100	NC Airport Managers

Published Stories

Organization	Date Story Ran/Aired/Was Distributed	Who Published	URL to the Story Online
NCDOT	01/09/23	NCDOT	

DISCUSSION

1. How have you shared your impacts in the past that worked well?
2. What else can we do to support your outreach?

Q&A

Next Steps



Davidson County Airport cross-interstate approach lighting

- ✓ Toolkit of materials emailed this morning, posted to Connect site Monday
- Monday, Jan. 9:
 - Website live
 - NCDOT press release issued
 - Collaborative campaign begins
- 20 printed brochures mailed to you
- Ongoing outreach
- Campaign results tracked on the Dashboard

Contact Us

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 ncdot.gov/aviation



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[NCDOTcommunications](https://www.youtube.com/channel/UC...)

**Thanks for all you do to create a strong
aviation economy for North Carolina!**
