

NORTH CAROLINA THE STATE OF AVIATION WHAT AVIATION MEANS TO OUR ECONOMY

JANUARY 2019

'Our network of 72 publicly owned airports, and the aviation and aerospace assets that rely on them, help move our economy forward by creating jobs, supporting business growth and connecting people and companies to markets around the globe."

Bobby Walston, Director N.C. Department of Transportation Division of Aviation

North Carolina: The State of Aviation was prepared by the Institute for Transportation Research and Education at North Carolina State University for the North Carolina Department of Transportation's Division of Aviation.

Analysis and findings by Daniel Findley, Ph.D., PE, Weston Head, Joy Davis and Steve Bert.



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MANUFACTURING



North Carolina has been at the forefront of aviation since the Wright Brothers' first flight at Kitty Hawk in 1903.

Our network of 72 publicly owned airports, and the aviation and aerospace assets that rely on them, help move our economy forward by creating jobs, supporting business growth and connecting people and companies to markets around the globe.

North Carolina's public airports annually contribute \$52 billion to the state's economy, supporting 307,000 jobs that generate \$12.6 billion in personal income and \$2.2 billion in state and local tax revenues.

Aerospace giants Boeing, Cessna, GE Aviation, Honda Aircraft, Lockheed Martin and Spirit Aerospace Systems call North Carolina home, choosing our state for its connectivity, skilled workforce and business-friendly environment.

North Carolina boasts the nation's second fastest growing aerospace manufacturing sector, with strong aerospace maintenance and military aviation enterprises, 14 commercial airline operators and 26 air freight companies. North Carolina is at the forefront of innovations catalyzing the growth of an unmanned aircraft systems (UAS or drones) economy.

This report highlights the significant economic impacts generated by North Carolina's public airports and the many assets that support a vibrant and competitive aviation and aerospace sector. Both make North Carolina an ideal location to start, grow and locate an aerospace or aviation-related business.

We invite you to learn about the many ways North Carolina is the state of aviation and join us as we take aviation and aerospace innovation to new heights.











NORTH CAROLINA: THE STATE OF AVIATION

NORTH CAROLINA'S AIRPORT SYSTEM

North Carolina's system of 72 public airports transport more than 62 million business and leisure travelers each year. They also move more than 850,000 tons of high-value, time-sensitive cargo such as medical supplies and advanced manufacturing components.

Ninety-four percent of the state's population lives within a 30-minute drive of a public airport.

Sixty-two airports are classified as general aviation which connect local businesses and communities to global markets, house and refuel private aircraft, support military and agricultural aviation, and provide aviation services such as aerial photography and pilot training. Ten additional airports classified as commercial service airports also offer regularly scheduled air service.

All airports generate significant economic return for their communities and the state.

The N.C. Department of Transportation's Division of Aviation, with funding from the State of North Carolina and the Federal Aviation Administration, supports airport development and operations with grants, long-range planning, technical assistance and airport management training.

The goal: Drive innovation and sector development that provides leading-edge aviation services for North Carolina, creating a strong aviation economy.

NORTH CAROLINA PUBLIC AIRPORTS





NORTH CAROLINA: PASSENGER SERVICE

Fourteen commercial airlines connect North Carolina travelers to 187 destinations worldwide.

All 10 commercial service airports continue to grow in passenger traffic, airlines and routes. Raleigh-Durham International Airport, for instance, added 12 new non-stop destinations in 2018, is adding a direct flight to Montreal in 2019, and is actively pursuing service to the Middle East and Asia. Charlotte Douglas International Airport, one of the world's 10 busiest airports, added four routes in 2017 and is in the process of adding nine more by mid-2019.

Commercial airlines own more than \$1 billion of property in North Carolina, which generates substantial tax revenues for the state.

AIRPORT	AIRLINES	ANNUAL PASSENGERS	DESTINATION	
Albert J. Ellis (Jacksonville) (OAJ)	American Airlines, Delta Air Lines	344,000	2	
Asheville Regional (AVL)	Allegiant Air, American Airlines, Delta Air Lines, Elite Airways, United Airlines	957,000	18	
Charlotte Douglas International (CLT)	Air Canada, American Airlines, Delta Air Lines, Frontier Airlines, JetBlue, Lufthansa, Southwest Airlines, United Airlines, ViaAir	45,910,000	183	
Coastal Carolina Regional (New Bern) (EWN)	American Airlines, Delta Air Lines	212,000	3	
Concord Regional (JQF)	Allegiant Air	234,000	6	
Fayetteville Regional (FAY)	American Airlines, Delta Air Lines, United Airlines	445,000	3	
Piedmont Triad International (Greensboro) (GSO)	Allegiant Air, American Airlines, Delta Air Lines, Frontier Airlines, United Airlines	1,758,000	17	
Pitt-Greenville (PGV)	American Airlines	91,000	1	
Raleigh-Durham International (RDU)	Air Canada, Alaska Airlines, Allegiant Air, American Airlines, Delta Air lines, Frontier Airlines, JetBlue, Southwest Airlines, United Airlines, Virgin America	11,653,000	64	
Wilmington International (ILM)	American Airlines, Delta Air Lines, United Airlines	831,000	8	
	TOTAL	62,435,000	187*	

- COMMERCIAL AIRLINES OPERATING AT N.C. AIRPORTS -





4K^{AIRLINE}JOBS

TH HIGHEST U.S. STATE FOR AIRLINE EMPLOYMENT

AIRLINE JOB

2014-2017



AIR CANADA
ALASKA AIRLINES
ALLEGIANT AIR
AMERICAN AIRLINES
CONTOUR AIRLINES
DELTA AIR LINES
ELITE AIRWAYS
FRONTIER AIRLINES
JETBLUE
LUFTHANSA
SOUTHWEST AIRLINES
SPIRIT AIRLINES
UNITED AIRLINES
VIAAIR



Source: Commercial service airports, 2017 passenger data, 2018 airline data *Unique destinations, not a cumulative total of all airport destinations

NORTH CAROLINA: AIR CARGO

North Carolina airports provide freight air services in support of the state's aviation economy. Air freight helps meet the global demand for the rapid movement of goods such as overnight packages and time-sensitive medical items.

LabCorp, a leading global life sciences company based in Burlington, uses aircraft that transport patient specimens a total of approximately 2.6 million miles each year-a distance that equates to traveling around the Earth about 104 times.

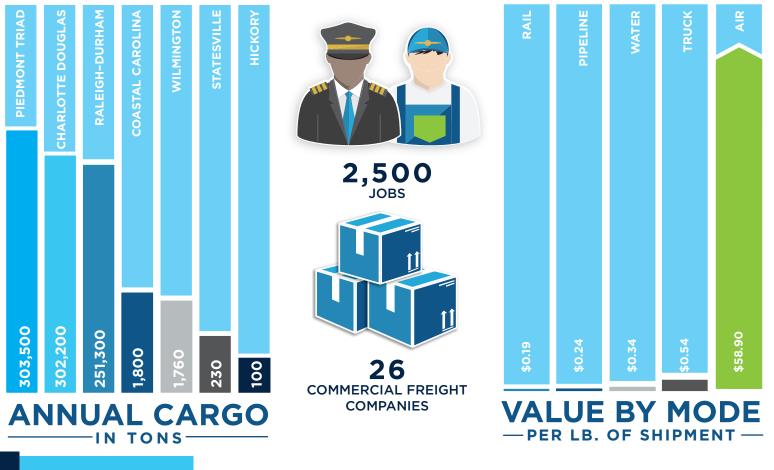
All airports connect their air freight systems to rail, port and truck freight systems, making them prime hubs for high-value goods traveling quickly and efficiently.

North Carolina ranks 15th among states in total tons of air freight cargo moved each year—more than 850,000 tons worth more than \$23 billion. North Carolina ranks eighth in the country for employment in air freight services.

FedEx, the state's largest air cargo serving company, moves 53 percent of the state's total while UPS moves an additional 19 percent.

TOP N.C. AIR CARGO CARRIERS

ABS AIR AMAZON PRIME AIR AMERICAN AIRLINES CARGO ATLAS AIR DELTA CARGO FEDEX LUFTHANSA CARGO SOUTHWEST CARGO U.S. AIRWAYS UPS



4

NORTH CAROLINA: SUPPORT INDUSTRIES

Airport-related businesses provide valuable support for airlines and airport customers, and boost the state's economy.

Thirteen rental car companies serve the state's 10 commercial services airports, many with locations at each airport. Rental car companies also serve many of the general aviation airports across the state. North Carolina benefits from an eight percent tax on short-term leases and rentals of motor vehicles, which totaled more than \$76 million in 2015.

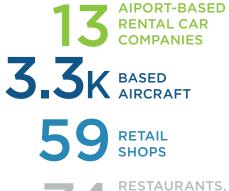
Additionally, retail shops operate at many of the airports, with 59 having a location in at least one North Carolina airport, providing an economic benefit while also serving passengers. Charlotte Douglas' 35 shops and Raleigh-Durham's 22 shops contributed more than \$6 million in state tax revenues in 2015.

North Carolina's airports are home to 74 restaurants, cafés and bars. Airport food service businesses contributed more than \$8 million in state tax revenue in 2015.

Fuel suppliers also play a significant role in the aviation industry. The number of gallons of aviation fuel sold in the state has increased significantly over the last 15 years at an average annual rate of eight percent.

North Carolina gains significant returns from 3,300 aircraft based at the state's general aviation facilities. For example, the owner of a \$1.5 million aircraft based at Asheboro Regional Airport pays local property taxes equivalent to those paid by owners of 10 \$150,000 homes.

FAST FACTS



RESTAURANTS, CAFÉS AND BARS



NORTH CAROLINA: AEROSPACE MANUFACTURING

North Carolina's aerospace manufacturing sector grew by 76 percent from 2007-2016 on the strength of companies like Boeing, Cessna, GE Aviation, Honda Aircraft, Lockheed Martin and Spirit Aerospace Systems that call the state their home.

The state's 180 aerospace manufacturing companies employ more than 9,500 people.

These companies focus primarily on:

- Aircraft, engines and engine parts;
- Search, detection and navigation instruments; and
- Manufacturing and supplying goods for the aviation industry, from tires and tray tables to carbon and graphite products.

Manufacturing thrives in North Carolina thanks to the nation's lowest corporate tax rate (among the 44 states that assess corporate taxes). It also boasts a highly educated and skilled population, a significant military-to-workforce pipeline, and a renowned, workforce-focused community college system that combine to create an ideal environment for manufacturing to thrive.

The state boasts 3,200 miles of active freight railroads that service 86 of the state's 100 counties and nearly 80,000 miles of state roadways, the nation's second largest state-maintained roadway system. This connectivity enables North Carolina manufacturing companies to reach global and national markets.





6 AEROSPACE MANUFACTURING

NORTH CAROLINA: AEROSPACE MAINTENANCE, REPAIR AND OVERHAUL

More than 148 companies and 4,400 skilled workers support North Carolina's aerospace sector with critical maintenance, repair and overhaul (MRO) services. North Carolina ranks fifth in the nation in MRO employment according to the Bureau of Labor Statistics.

Multiple MRO firms, including DRS Technologies and Vector CSP, operate near Elizabeth City Coast Guard Air Station, supporting the needs of the U.S. Coast Guard's aircraft fleet.

Greensboro's HAECO Americas, the largest aerospace MRO company operating in North Carolina, employs nearly 3,000 people.





AEROSPACE MAINTENANCE, REPAIR AND OVERHAUL

NORTH CAROLINA: MILITARY AVIATION

Military aviation provides significant employment in North Carolina, with eight locations employing 70,000 people. The largest of these is Fort Bragg, the largest military base in the world, employing more than 50,000 people.

North Carolina's military population provides one of the largest workforce pipelines in the country, with approximately 20,000 trained veterans entering the civilian workforce every year.

In 2017, North Carolina businesses earned \$2.8 billion in defense contracts to produce military and defense products.

Military aviation also significantly contributes to the state's public airports. Each year, approximately 200,000 military operations occur at the state's 72 public airports, providing revenue and jobs for local communities.

KEY MILITARY AVIATION LOCATIONS

- POPE FIELD AT FORT BRAGG | FAYETTEVILLE
- 2 SEYMOUR JOHNSON AIR FORCE BASE | GOLDSBORO
- 3 MARINE CORPS AIR STATION CHERRY POINT | HAVELOCK
- A MARINE CORPS AIR STATION NEW RIVER | JACKSONVILLE
- 5 ELIZABETH CITY COAST GUARD AIR STATION

N.C. NATIONAL GUARD

- 6 145TH AIRLIFT WING | CHARLOTTE DOUGLAS AND STANLY COUNTY
- 7 449TH THEATER AVIATION BRIGADE | RALEIGH-DURHAM
- 8 449TH THEATER AVIATION BRIGADE | ROWAN COUNTY









\$2.8 BILLION

IN DEFENSE CONTRACTS EARNED BY N.C. BUSINESSES IN 2015 TO PRODUCE MILITARY AND DEFENSE PRODUCTS

NORTH CAROLINA: UNMANNED AIRCRAFT SYSTEMS

North Carolina has positioned itself at the forefront of efforts to expand public and private use of unmanned aircraft systems (UAS or drones), implementing a robust program of public education and outreach, university and industry partnerships, agile response to public needs and advanced technology development and utilization.

The N.C. General Assembly sets regulations to protect public safety and privacy while funding the NCDOT Division of Aviation's UAS Program to expand safe, beneficial drone use. North Carolina operates the only state permitting program in the nation for government and commercial users.

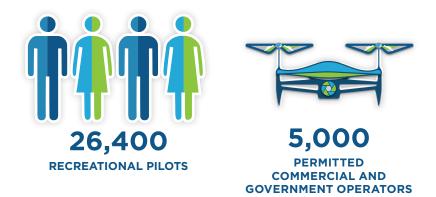
The state counted more than 26,400 recreational users and 5,000 permitted commercial and government operators at the end of 2018. Those numbers are growing as an aggressive schedule of public workshops, social media outreach, annual summits, government education and pilot programs expose businesses, agencies and residents to the benefits drones offer for improving service delivery and lowering costs.

NCDOT was among 10 teams selected by the U.S. Department of Transportation for its three-year Drone Integration Pilot Program to test and inform national regulations and systems for drone use. Cutting-edge technologies and an expansive network created for NCDOT's pilot program using drone delivery for medical and food package delivery and infrastructure inspection also proved invaluable when repurposed to support the state's emergency response to a major hurricane in 2018. North Carolina also participated in two 2018 NASA-sponsored market analyses of urban air mobility components.

Leading-edge UAS research efforts are underway at the state's universities, developing standards for UAS testing and safe operations while utilizing UAS for advanced agricultural, environmental and industrial applications. Community colleges promote drone safety by creating certifications and training for commercial and public safety professionals. Montgomery Community College operates the N.C. Public Safety Drone Academy, equipping regional emergency service members and first responders to become effective drone pilots.

Private companies contribute by studying commercial and public safety use cases for drones. North Carolina-based PrecisionHawk, the world's most well-capitalized commercial drone venture, has expanded its ability to provide services around the world and across industries, adding product offerings in energy, insurance, government and construction.

Public safety agencies are integrating drone technology in their response efforts to help save lives and protect property. NCDOT supports this by establishing best practices, recommending policies for agencies using UAS and working with agencies to safely integrate this technology into their operations. For example, an NCDOT/N.C. State Highway Patrol project showed that drones could expedite law enforcement's investigation of traffic collisions, making the response to roadway incidents more safe and efficient.



UNMANNED AIRCRAFT SYSTEMS 9

NORTH CAROLINA: AVIATION EDUCATION

North Carolina's robust higher education sector provides an abundant supply of well-educated and highly-skilled talent to meet the needs of the aviation and aerospace industries, as well as research and innovative technologies that propel the industry forward.

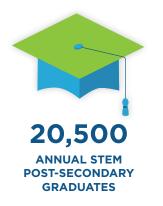
Four-year universities and community colleges offer more than 28 degree programs that are relevant to aviation and the aerospace sector. For example:

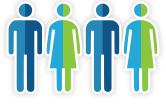
- Elizabeth City State University offers a four-year aviation science bachelor's degree, with specializations in flight education, air traffic control, aviation electronics (avionics) and aviation management.
- Guilford Technical Community College offers associate degrees and diploma programs in avionics, aviation management, aviation manufacturing and aviation system technology.
- N.C. community colleges have been adding courses and programs in unmanned aircraft systems since 2017 when the N.C. Community College System approved a UAS curriculum developed in collaboration with the Division of Aviation.

North Carolina's strong K-12 STEM education initiative also supports the aviation workforce, including operating aviation-focused high schools such as Northeast Academy for Aerospace and Advanced Technologies in Elizabeth City.

The community college system and N.C. Department of Commerce provide extensive workforce development support, certificate and degree programs, and customized worker training for companies. Their goal is to have 67 percent of the state's working-age population educated and trained above the high school level by 2025.

Meanwhile, N.C. State's Institute for Transportation Research and Education provides research and expertise that advances innovations in surface and air transportation.





1,134 ANNUAL STUDENTS IN COMMUNITY COLLEGE AVIATION PROGRAMS



366 ANNUAL STUDENTS IN FOUR-YEAR AVIATION PROGRAMS



28 POST-SECONDARY AVIATION PROGRAMS

AVIATION AND AEROSPACE-RELATED DEGREE PROGRAMS

UNIVERSITY	PROGRAM	CURRENTLY ENROLLED			
Duke	Aerospace Engineering	14*			
Elizabeth City State	Aviation Science	25			
N.C. State Aerospace Engineering 341					
Source: Higher education institutions. Enrollment as of Spring 2017.					

*Total graduates from 2017-2018 academic year

COMMUNITY COLLEGE	PROGRAM	CURRENTLY ENROLLED
	Aviation Management and Career Pilot Technology	70
Asheville-Buncombe Technical	Aviation Ground School: Pilots Continuing Education	8
	Aircraft Structural Training Continuing Education	6
Brunswick	Aviation Ground School: Pilots Continuing Education	4
Caldwell	Aviation Management and Career Pilot Technology	1
College of	Aviation Systems Technology	39
The Albemarle	Aviation Maintenance Continuing Education	8
	Aviation Systems Technology	78
·	Aircraft Structural Training Continuing Education	26
Craven	Aviation Maintenance: Power Plant Continuing Education	25
	Aviation Maintenance: Airframe Continuing Education	27
Exception (II)	Aviation Ground School: Pilots Continuing Education	12
Fayetteville	Airframe Systems Continuing Education	6
Gaston College	Aviation Ground School: Pilots Continuing Education	6
	Aviation Electronics (Avionics) Technology	90
	Aviation Management and Career Pilot Technology	136
Guilford Technical	Aviation Systems Technology	314
Guilford Technical	Aviation Instrument Rating Continuing Education	1
	Aircraft Dispatcher Continuing Education	12
	Aircraft Structural Training Continuing Education	86
	Aerostructure Manufacturing and Repair	6
Lenoir	Aviation Management and Career Pilot Technology	24
	Aircraft Structural Training Continuing Education	82
Wayne	Aviation Systems Technology	57
Wilson	Aviation Ground School: Pilots Continuing Education	10
Source: No	rth Carolina Community College System (Enrollment as of S	pring 2017)

NORTH CAROLINA: ECONOMIC IMPACTS OF N.C. AIRPORTS

ANNUAL AIRPORT IMPACTS	JOBS	PERSONAL INCOME	STATE AND LOCAL TAXES	ECONOMIC OUTPUT
COMMERCIAL SERVICE AIRPORTS	281,945	\$11,306,100,000	\$1,989,600,000	\$47,428,600,000
GENERAL AVIATION AIRPORTS	25,040	\$1,288,100,000	\$176,738,000	\$4,956,030,000
TOTAL AIRPORT IMPACTS	306,985	\$12,594,200,000	\$2,166,338,000	\$52,384,630,000

COMMERCIAL SERVICE AIRPORT IMPACTS							
AIRPO	ORT ID AND NAME	CITY/TOWN	JOBS	PERSONAL INCOME	STATE AND LOCAL TAXES	ECONOMIC OUTPUT	
				AIR CARRIER AIRPORT	S		
OAJ	Albert J. Ellis	Jacksonville	2,785	\$95,800,000	\$15,300,000	\$474,200,000	
AVL	Asheville Regional	Asheville	8,915	\$316,800,000	\$48,400,000	\$1,482,900,000	
CLT	Charlotte Douglas International	Charlotte	132,330	\$5,744,500,000	\$1,139,700,000	\$23,029,200,000	
EWN	Coastal Carolina Regional	New Bern	2,125	\$72,000,000	\$12,000,000	\$362,700,000	
FAY	Fayetteville Regional/Grannis Field	Fayetteville	4,410	\$164,800,000	\$27,100,000	\$784,200,000	
JQF	Concord Regional	Concord	4,505	\$191,100,000	\$30,300,000	\$821,400,000	
GSO	Piedmont Triad International	Greensboro	25,500	\$1,237,600,000	\$190,300,000	\$5,861,500,000	
PGV	Pitt-Greenville	Greenville	1,650	\$59,600,000	\$8,800,000	\$280,700,000	
RDU	Raleigh-Durham International	Raleigh/ Durham	86,765	\$2,968,200,000	\$450,900,000	\$12,579,800,000	
ILM	Wilmington International	Wilmington	12,960	\$455,700,000	\$66,800,000	\$1,752,000,000	
СОМ	MERCIAL SERVICE AIRPORTS TOTAL		281,945	\$11,306,100,000	\$1,989,600,000	\$47,428,600,000	

QUANTIFYING IMPACTS

The latest analysis of the economic impacts of North Carolina's public airports, conducted by North Carolina State University's Institute for Transportation Research and Education (ITRE), reveals that North Carolina airports generate far greater economic benefits than earlier reported.

Aviation-related businesses that engage with the state's 10 commercial service and 62 general aviation airports contribute more than \$52 billion in economic output, 307,000 jobs, \$12.6 billion in personal income and \$2.2 billion in state and local tax revenues, based on ITRE's 2018 analysis of 2017 airport data.

The increase in economic output from the \$31 billion reported in 2016 was primarily due to two factors: economic growth and new methodology that captures both the impact of jobs located on the 10 commercial service airports and the impact of business travelers to those airports.

The commercial service airport analysis quantified the impacts of leisure visitors, 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.

See the full report at *ncdot.gov/aviation*.

12 ECONOMIC IMPACTS OF N.C. AIRPORTS

NORTH CAROLINA: GENERAL AVIATION AIRPORT IMPACTS

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ECONOMIC IMPACTS OF N.C. AIRPORTS 13



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