Ohio Airports Are Economic Engines

Air transportation is a key contributor to Ohio’s economy. As part of the Ohio Airports Focus Study, the Ohio Department of Transportation’s Office of Aviation commissioned the Ohio Airports Economic Impact Study to measure the economic benefits provided by the state’s airport system and aviation-related activities. The statewide economic impact study shows how airports and the linkages they provide both support and stimulate economic activity throughout the state.

In today’s time-sensitive business environment, air transportation improves efficiency by enabling businesses to expedite the delivery of their products to market. In effect, Ohio’s airports are the gateway to both the nation’s air transportation system and the world’s economy.

Ohio’s airports are also home to a variety of business and government entities. These range from airlines to flight schools to corporate flight departments. These airport businesses create on-airport jobs across the state.

Additionally, airports in Ohio promote the state’s tourism industry. Air transportation brings tourists to Ohio, enabling them to enjoy the state’s bustling cities, picturesque small towns, variety of cultural and recreational activities, and numerous historic sites. During these trips, visitors spend money locally on food, lodging, events, and other items.

When all of the impacts of Ohio’s 104 publicly-owned, public-use airports are added together, 123,456 total jobs can be traced to the aviation industry. These employees receive $4.2 billion in total payroll and generate $13.3 billion in total economic activity.
A Robust Public-Use Airport System

Ohio is served by a diverse system of airports ranging in size from small general aviation airports to busy corporate airports to Cleveland-Hopkins International, the busiest commercial service airport in Ohio and one of the 50 busiest in the United States. This study included Ohio’s seven commercial airports along with 97 general aviation airports.
Behind the Numbers

The economic benefits associated with airports in Ohio were estimated using a standard econometric modeling process that meets guidelines established by the Federal Aviation Administration. This economic input-output model estimates benefits in terms of employment, payroll, and economic output. This methodology has been used to successfully quantify the benefits of airports and airport systems throughout the United States.

The input for this model came from numerous data gathering efforts. Airport managers, aviation-related businesses, and government agencies were surveyed to collect the data necessary to estimate the employment, payroll, and output each airport supports. Visitors to Ohio using commercial airlines and general aviation aircraft were surveyed to estimate the benefits created from their expenditures. The induced and indirect impacts of these airport activities were calculated using multipliers that are specific to Ohio. For example, when an airport employee purchases local goods and services, that spending circulates through the local economy by supporting the jobs and payroll of other businesses and thereby generates additional economic activity in the region. The total economic impact is the sum of all airport-related activity and multiplier impacts.

How Aviation’s Benefits Are Quantified

**IMPACT TYPES**

**Direct Impacts** account for activities by on-airport businesses and government agencies, and the off-airport visitor spending at locations such as hotels and restaurants. Direct impacts account for the initial point where money first starts circulating in the economy.

**Multiplier Impacts** result from the recirculation of direct impacts within the economy. This re-spending of money can occur multiple times and takes two forms – indirect and induced. Indirect impacts occur when companies incur business expenses. Induced impacts occur when employees purchase goods and services.

**Total Economic Impacts** are the combination of all direct and multiplier impacts.

**IMPACT MEASURES**

**Employment** measures the number of full-time equivalent (FTE) jobs related to airport activity including visitor-supported and on-airport construction jobs. A part-time employee counts as half of a full-time employee.

**Payroll** measures the total annual salary, wages, and benefits paid to all workers whose livelihoods are directly attributable to airport activity.

**Economic Output** measures the value of goods and services related to airports in Ohio. The output of on-airport businesses is typically assumed to be the sum of annual gross sales and average annual capital expenditures.
Ohio’s Airports are Job Generators

Airports connect Ohio’s citizens and businesses to the rest of the state, our nation, and the global economy. The total economic contribution of Ohio’s 104 public-use airports comes from day-to-day business activities, expenditures to preserve and improve airport infrastructure, the spending of visitors that arrive by plane, and the recirculation of spending by on-airport businesses and visitors. Ohio’s airports generate more than 123,400 jobs, $4.2 billion in annual payroll, and $13.3 billion in annual economic output.

<table>
<thead>
<tr>
<th></th>
<th>Total Employment*</th>
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*Includes multiplier impacts

Ohio’s Airports... Did you know?

- There are 15 air traffic control towers operating at Ohio’s airports.
- Ohio’s commercial service airports enplane nearly 10 million passengers annually.
- There are more than 130 corporate flight departments based at Ohio’s system airports.
- FAA records indicate that Ohio is home to 12,931 pilots.

Ohio’s system airports handle more than 2.7 million general aviation operations annually.

More than 70% of Ohio’s system airports provide aviation education opportunities.

Out of the 104 system airports in Ohio, 95 have some type of instrument approach procedure.

The longest runway in Ohio is 12,102 feet long and serves Rickenbacker International. It is also the state’s widest runway at 200 feet.
## Total Economic Impacts by Airport

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<tr>
<td>Washington Court House</td>
<td>Fayette County</td>
<td>8</td>
<td>$183,000</td>
<td>$541,000</td>
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<tr>
<td>Wauseon</td>
<td>Fulton County</td>
<td>78</td>
<td>$2,195,000</td>
<td>$8,988,000</td>
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<tr>
<td>Waverly</td>
<td>Pike County</td>
<td>6</td>
<td>$210,000</td>
<td>$697,000</td>
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<tr>
<td>West Union</td>
<td>Alexander Salamon</td>
<td>4</td>
<td>$121,000</td>
<td>$395,000</td>
</tr>
<tr>
<td>Willard</td>
<td>Willard</td>
<td>2</td>
<td>$28,000</td>
<td>$165,000</td>
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<tr>
<td>Willoughby</td>
<td>Willoughby Lost Nation Municipal</td>
<td>117</td>
<td>$2,799,000</td>
<td>$9,428,000</td>
</tr>
<tr>
<td>Wilmington</td>
<td>Clinton Field</td>
<td>53</td>
<td>$1,615,000</td>
<td>$5,770,000</td>
</tr>
<tr>
<td>Wilmington</td>
<td>Wilmington Air Park</td>
<td>2,567</td>
<td>$93,776,000</td>
<td>$174,347,000</td>
</tr>
<tr>
<td>Woodsfield</td>
<td>Monroe County</td>
<td>14</td>
<td>$617,000</td>
<td>$1,908,000</td>
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<tr>
<td>Wooster</td>
<td>Wayne County</td>
<td>148</td>
<td>$5,818,000</td>
<td>$21,826,000</td>
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<tr>
<td>Zanesville</td>
<td>Zanesville Municipal</td>
<td>58</td>
<td>$1,815,000</td>
<td>$6,415,000</td>
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<tr>
<td>General Aviation Airports Total</td>
<td></td>
<td>17,497</td>
<td>$688,184,000</td>
<td>$1,847,116,000</td>
</tr>
<tr>
<td>ALL AIRPORTS TOTAL</td>
<td></td>
<td>123,456</td>
<td>$4,194,316,000</td>
<td>$13,333,989,000</td>
</tr>
</tbody>
</table>

*Includes multiplier impacts
Enhancing Ohioans’ Quality of Life

In addition to substantial annual economic benefits, Ohio’s airports provide a wide variety of qualitative benefits that deserve consideration when the total value of the state’s system of airports is considered. Qualitative benefits are those airport-supported activities that add to the quality of life, but are difficult to assign a dollar value. Examples of qualitative benefits at Ohio’s airports include:

- FACILITATING EMERGENCY MEDICAL TRANSPORT
- PROVIDING SUPPORT TO LAW ENFORCEMENT
- CONDUCTING UTILITY INSPECTION OPERATIONS
- SUPPORTING U.S. MILITARY OPERATIONS AND EXERCISES
- SUPPORTING AERIAL APPLICATION OF FERTILIZERS AND PESTICIDES
- REACHING OUT TO YOUTH WITH AVIATION-RELATED ACTIVITIES

FACILITATING OHIO BUSINESS

The use of air travel and aviation services helps businesses throughout the United States increase their productivity and achieve their goals, and Ohio is no different. Many off-airport businesses in Ohio benefit greatly from the presence of the state’s system of airports.

Approximately 2,700 Ohio businesses in industries with a known propensity to use airports—primarily manufacturing, finance, transportation, communications, and select services—were surveyed to measure their reliance upon aviation. Survey responses revealed the following:

- 71 percent of responding businesses indicated that their employees rely on commercial airline service, while 64 percent indicated clients or customers use commercial airline service to visit their business location.
- 22 percent of their total business activity is dependent on commercial aviation, while 5 percent is dependent on general aviation.
- 22 percent indicated their employees rely on general aviation, while 28 percent indicated that clients or customers use general aviation to visit their business location.
- When asked questions regarding the importance of certain factors and amenities considered when contemplating relocation or expansion, 62 percent reported that the existence of a commercial service airport is a prominent factor in the choice of business location, while 40 percent reported the existence of a general aviation airport is central to where they locate.
ALL TAXPAYERS BENEFIT

In 2012, general aviation activity at Ohio’s airports generated an estimated $29.6 million in tax revenue for the state’s General Revenue Fund through a 5.5 percent state sales tax on both aviation fuel and aviation goods and services. These revenues help fund programs and services for all Ohioans.

OHIO’S AIRPORT SYSTEM: A $5.2 BILLION ASSET

Ohio, through years of investment by ODOT, FAA, airport sponsors, businesses, and individuals, has developed a very robust system of general aviation airports. By evaluating the current cost of replacing each facility, the magnitude of this asset can be established. Developing an estimate of each general aviation airport’s replacement cost provides the public, airport stakeholders, as well as policy decision makers an understandable value range for each airport and combined value of Ohio’s system of general aviation airports. The valuation estimate for Ohio’s general aviation airports took into account the value of each airport’s land based on its location, the cost to replace runways and taxiways, the value of on-airport assets such as navigational aids, fuel farms, hangars, and other buildings, and estimated costs for planning, engineering, permitting, and environmental contingencies.

<table>
<thead>
<tr>
<th>Asset Category of Ohio’s General Aviation Airports</th>
<th>Airport Valuation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Land</td>
<td>$1.4 billion</td>
</tr>
<tr>
<td>Runways, Taxiways, and Aprons</td>
<td>$1.9 billion</td>
</tr>
<tr>
<td>Hangars, Buildings, and Auto Parking</td>
<td>$0.7 billion</td>
</tr>
<tr>
<td>Nav aids, Lights, and Fuel Farms</td>
<td>$0.2 billion</td>
</tr>
<tr>
<td>Engineering, Planning, Permitting, and Environmental</td>
<td>$0.6 billion</td>
</tr>
<tr>
<td>Other</td>
<td>$0.4 billion</td>
</tr>
<tr>
<td>Total</td>
<td>$5.2 billion</td>
</tr>
</tbody>
</table>
Ohio’s Unique Aviation Culture

Ohio’s distinguished history of aviation development has provided the state with many benefits, including some areas that offer unique opportunities to Ohioans and visitors. Dayton natives Wilbur and Orville Wright pioneered the tradition - and industry - and that pioneering spirit remains.

**AVIATION ENHANCES OHIO’S SHALE OIL & GAS INDUSTRY**

Shale oil and gas production is a growing industry in Ohio that is expected to have a significant impact on the state for many years to come. Airports – both commercial service and general aviation – are crucial gateways enabling industry personnel to efficiently access areas of interest throughout the state.

Ohio’s commercial service airports provide shale oil and gas extraction companies with access to the state and region, while Ohio’s general aviation airports provide access to the more remote areas of the state where drilling sites are more prevalent. Many airports have already seen increased activity as gas companies oversee the work. In several cases, airports have lease agreements for drilling directly on airport property, which provides the airport with supplemental revenue which must be used for airport development. In either case (increased activity or on-airport drilling), Ohio’s airports directly benefit from the state’s emerging shale boom.

**ISLAND AIRPORTS MAKE LAKE ERIE A YEAR-ROUND DESTINATION**

Another unique aspect of aviation in Ohio is the state’s four Island Airports. These airports are situated on four separate islands that are part of an archipelago known as The Lake Erie Islands, clustered north of Sandusky, Ohio, and consisting of Kelleys Island, North Bass Island, Middle Bass Island, and South Bass Island. These are Ohio’s largest islands and are each home to one state system airport that serves the unique needs of each community. The airports are vital links between the mainland and each island community, as the only other mode of access is by boat. Through these airports, island residents have daily postal service, emergency medical transportation, grocery delivery, prescription medication delivery, and other essential services year round.
TRAINING THE AVIATION EXPERTS OF TOMORROW

Aviation education, including flight training, is an important element of the aviation industry in Ohio and the nation. Schools in Ohio train students to become pilots, air traffic controllers, aircraft mechanics, flight attendants, airport managers and many other professions within the industry. These aviation-related curriculums range from major university programs to small training classes at general aviation airports. While most of these schools are located on-airport, many of the higher education programs offer coursework both on and off airports.

Nearly a dozen education institutions offer aviation training in Ohio, including The Ohio State University, Ohio University, and Embry-Riddle Aeronautical University. These schools have extensive aviation programs supported by numerous faculty and staff.

The combination of universities offering aviation education, numerous airport tenants providing training, and various other activities provides Ohio with a good aviation education network. These schools will help ensure the continued viability of aviation in the state, while training the aviation professionals and pilots of tomorrow.

FRACTIONAL OWNERSHIP STARTED IN OHIO

In 1986, NetJets formed the fractional ownership model, in which a company or person owns a share of an aircraft, lowering the cost to the owner while increasing the utility of the aircraft. Headquartered in Columbus, NetJets has grown substantially and has a significant economic impact in Ohio. Flight Options continued the growth of the Ohio fractional ownership industry when it started operations in 1998 at Cuyahoga County Airport near Cleveland. Together with MaxFlight, based at the Dayton-Wright Brothers Airport, these three fractional ownership companies directly employ more than 1,400 workers in Ohio. The availability of these services in Ohio greatly enhances the ability of companies to do business on a tighter schedule with higher mobility and for a lower cost.
For more information on the Ohio Airports Economic Impact Study, go to www.dot.state.oh.us/Divisions/Operations/Aviation/OhioAirportsFocusStudy/Pages/default.aspx, or contact:

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Office: (614) 387-2352

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