

SOUTH CAROLINA  
AERONAUTICS  
COMMISSION

ECONOMIC IMPACT

# *Technical Report*



2018



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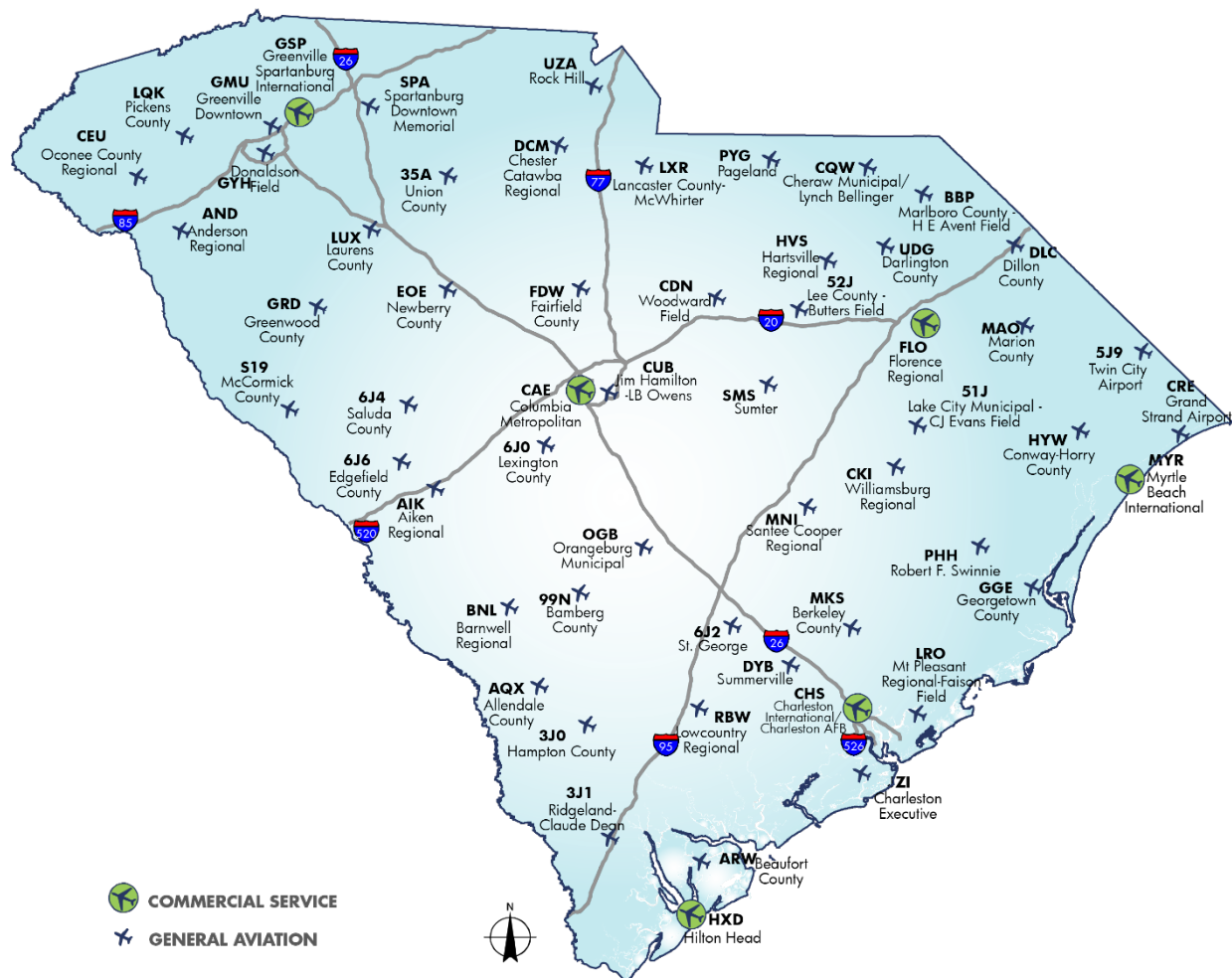
## 1.0 INTRODUCTION

In fall of 2017, the South Carolina Aeronautics Commission (SCAC) undertook a comprehensive research project to estimate the economic impact of 57 public commercial and general aviation airports in South Carolina. This report presents the results of that effort. Primary objectives for the project were as follows:

- Estimate the annual economic impacts that South Carolina realizes from the day-to-day operation of public commercial and general aviation airports.
- Estimate the annual economic impacts realized as a result of aviation related businesses located at each of the 57 study airports.
- Estimate the annual impacts realized throughout the state resulting from capital investment at the public airports.
- Estimate the economic impacts from the spending of visitors who arrive in South Carolina on privately owned general aviation aircraft and on scheduled commercial airline flights.
- Estimate annual state and local tax revenues contributed by airports and airport supported activities.

Airports included in SCAC's Statewide Economic Impact Study are shown in **Figure 1 – Study Airports**.

FIGURE 1 – STUDY AIRPORTS



Source: South Carolina Aeronautics Commission



A Project Advisory Committee helped provide oversight for the research project. This Committee represented aviation interests in South Carolina. Staff from SCAC were also actively involved in the development and review of research results. Members of the Project Advisory Committee and SCAC who participated in the project are shown below.

### **South Carolina Statewide Economic Impact Study Project Advisory Committee**

General Aviation Airport Representative – Chris Eversmann, Manager of Jim Hamilton, LB Owens Airport

Commercial Airport Representative – Kevin Howell, Vice President and Chief Operations Officer of Greenville-Spartanburg International Airport

South Carolina Aeronautics Commissioner – Ira “Bud” Coward, District 2 Commissioner

### **South Carolina Aeronautics Commission Staff**

James Stephens – Director

Paul Werts – Project Manager

David Smith – GIS/Airport Planner

Gary Siegfried – Airports Engineer

Highlights from South Carolina’s Statewide Economic Impact Study include:

- The 57 public commercial and general aviation airports support total jobs estimated at **122,759** with an associated annual payroll of nearly **\$4.8 billion**.
- The airports support annual economic activity estimated at over **\$16.3 billion**.
- About 26% of the total statewide annual economic activity estimated in SCAC’s study is associated with the operations of Boeing Company at Charleston International Airport.
- Direct activities supported at and by the airports contribute an estimated **\$657 million** in annual state tax revenues.
- There are an estimated **41,755** additional jobs in South Carolina that have improved efficiency from using aviation.

The remainder of this report contains the results of the Statewide Economic Impact Study. The report is generally organized as follows:

- Sources and Measurements of Economic Impact
- Direct Economic Impacts for Study Airports
- Indirect/Induced Economic Impacts for Study Airports
- Total Annual Economic Impacts for Study Airports
- Statewide Airport-Supported Tax Revenues
- Estimate of Non-Aviation Jobs Benefiting from Airports
- Summary and Conclusions

## 2.0 SOURCES & MEASUREMENTS OF ECONOMIC IMPACT FOR THE 57 PUBLIC AIRPORTS IN SOUTH CAROLINA

### 2.1 Sources for Airport Specific Economic Impacts

For this statewide study for South Carolina's commercial and general aviation airports, economic impacts were estimated for various economic activity centers. Annual economic impacts were estimated for each of the following:

- Airport management
- Aviation-related airport tenants
- Investment related to capital improvements
- Visitors arriving on general aviation aircraft
- Visitors arriving on commercial airlines (commercial airports only)

These five centers of economic activity are described below:

- **Airport Management:** Most public commercial and general airports support jobs that are associated with daily airport administrative, maintenance, and operational functions. On-airport jobs in the airport management category may be full-time or part-time. Airports also report that they sometimes support jobs that are seasonal in nature. Since most airports in South Carolina are owned/operated by a city or a county, some jobs related to the airport management function are located off-airport. Full-time or part-time employment related to human resources, accounting, maintenance, grants administration, and financial/legal services are often located off-airport. An airport's need for these services is often not full-time, and the airport associated job is shared with other city/county departments. All less than full time, off-airport airport-related jobs were identified and documented in this study.

For this analysis, all part-time, seasonal, and off-airport jobs that are less than full-time were converted to full-time equivalent employment (FTE). The conversion to full-time positions (both on- and off-airport) was accomplished considering the number of reported hours that each less than full-time employee works directly in support of an airport.

- **Airport Tenants/Businesses:** Most of the South Carolina airports also have on-airport businesses that provide aviation related services or support to airport customers. Examples of airport tenants include fixed base operators (FBOs), aircraft maintenance providers, commercial airlines, Part 135 operators, flight schools, corporate flight departments, concessionaires, military units, avionics repair shops, and/or other similar aviation related businesses. For this analysis, only aviation-related businesses located "inside the fence" at an airport were included in the tenant category.

Economic impacts for any non-aviation on-airport businesses were not considered in this analysis, nor were the impacts of other off-airport aviation/aerospace businesses in South Carolina.

- **Capital Investment:** Airports in South Carolina often undertake capital improvement projects for maintenance, expansion, and/or replacement. Projects are often funded with grants from the South Carolina Aeronautics Commission and the Federal Aviation Administration (FAA). Larger airports sometimes generate sufficient revenue to fund development projects without federal or state assistance. Occasionally, third party investment, especially for hangar development, is also made. For this study, average annual capital investment for a multi-year historic period was considered to estimate South Carolina's economic impacts resulting from airport-related capital investment.

The study considered multiple years of historic investment so that smaller airports that do not routinely complete large capital investment projects were not “penalized.” Considering average annual capital investment over a multi-year period helps to capture the full economic benefit that South Carolina’s economy receives from the operation of the airport system.

Unlike the other centers of economic impact discussed in this section, economic impacts in this category (jobs, payroll associated with the jobs, spending, and annual economic activity) occur only when investment associated with the project is taking place. Once project-related spending is over, economic impacts associated with capital investment are suspended.

Since economic impact studies, such as this SCAC study, reflect economic conditions that are a “snapshot in time,” economic impacts for this activity center have the propensity to change, perhaps even significantly, between reporting periods. Economic impacts in the CIP investment category are not on-going and they change year-to-year, unless CIP investment is constant and is at the same level each year. This is seldom the case since the need for capital improvement projects and associated investment changes annually.

- **Visitors Arriving on General Aviation Aircraft:** Throughout the year, all South Carolina airports accommodate varying numbers of visitors who fly to communities served by one of the 57 airports. Both commercial and general aviation airports serve visitors who arrive in the state on general aviation aircraft. General aviation visitors may arrive one person at a time, or they may arrive in larger groups on non-scheduled charter aircraft that are included in the general aviation category. Some visitors to South Carolina rely on general aviation travel because it enables them to shorten the duration of their trip, or it enables the visitor to fly directly to a destination not served by scheduled commercial airline flights.

Frequently, general aviation visitors arrive and depart on the same day, limiting the amount of spending they have while in the state. Other visitors who arrive via general aviation aircraft stay for one or more days; these visitors have a greater economic impact on South Carolina’s economy. Overnight visitors often have spending for hotels, meals, retail, entertainment, and local transportation; the longer the visitor stays, typically, the greater the amount they spend. Visitor spending helps to support jobs and the payroll associated with the jobs in service, hospitality, recreational, entertainment, retail, and ground transportation categories.

For this study, South Carolina airports provided information that was used as the starting point for estimating the number of visitors that arrive via general aviation aircraft. In addition, SCAC has access to FAA data from the National Offload Program (NOP). NOP provides airport specific flight data for each of the South Carolina airports. SCAC used this data to help confirm volumes of visiting aircraft and the fleet mix for the visiting aircraft. Surveys completed with the assistance of FBOs and airport managers across the state helped to provide information on the length of time general aviation visitors stay in the state and the average amount they spend per trip.

- **Visitors Arriving on Scheduled Commercial Airlines:** The six commercial airports have economic impacts associated with visitors who arrive on a scheduled commercial airline. For this study, only the impacts of commercial air visitors who arrive via a South Carolina commercial airport were measured. As a result of the proximity of commercial airports in neighboring states, there are visitors to South Carolina who arrive on a commercial airline, but they arrive at an airport in a neighboring state and then drive to South Carolina. The impacts of these visitors were not estimated/measured in this study. Data from the USDOT provides an estimate of the portion of each airport’s annual enplanements that are visitors versus residents. USDOT data provides estimates of residents versus visitors as a percent of each airport’s total annual passenger enplanements. Similar to general aviation visitors, commercial airline visitors have spending that helps to support jobs and the payroll associated with these jobs. Surveys of visitors using South Carolina’s commercial airports, conducted in conjunction with this study with the help of South Carolina’s commercial airports, were used to determine average length

of stay and visitor spending patterns. Using estimates of annual visitors, visitor spending, and length of stay patterns, this study estimated annual economic impacts for this activity center.

These five centers of economic activity were considered in this statewide economic impact study to estimate annual economic impacts for each of the 57 study airports. To the extent that there are not issues with confidentiality, economic impacts for each of the activity centers discussed above are presented individually for each airport.

## 2.2 Measurements for Airport Specific Economic Impacts

As part of this study, all annual economic impacts are estimated for four measures: employment, payroll, spending, and annual economic activity. These measures are discussed below:

- **Employment** is the most straightforward and the most easily understood measure of economic impact. In this study, jobs are identified for airport management and airport tenants through surveys and interviews. Spending by visitors who come to South Carolina on general aviation aircraft or on scheduled commercial carriers also supports other jobs. Additionally, while investment is being made to implement capital projects, this investment supports other jobs over the duration of the project's actual planning and construction.
- **Payroll** measured in this study is that associated with all jobs supported by airport management, airport tenants, capital investment, and air visitors.
- **Spending** for airport management and airport tenants equals their annual purchase of goods and services to run the airport or to run their business. Spending for airports and airport tenants does not include payroll nor CIP investment. In the visitor categories, spending is equal to the expenditures that all visitors have for lodging, food, ground transportation, entertainment, and retail, minus the portion of this spending that is labor related. In the CIP category, spending is equal to total investment made to implement projects, minus the estimated cost for labor.
- **Annual Economic Activity:** For all categories, it is important to show the total annual economic impact that South Carolina realizes from airports and airport supported activities. For each of the impact categories, annual economic activity is the sum of payroll and spending.

For this study, economic impacts for the state and for individual airports are expressed in terms of employment, the annual payroll associated with employment, annual spending, and the annual economic activity that each airport supports through expenditures in the spending and payroll categories. As noted, each of these four measurement categories (employment, payroll, spending, and economic activity) are used to quantify total annual economic impacts from airport management, tenants, capital investment, and visitor spending for South Carolina's public commercial and general aviation airports.

## 2.3 Method to Estimate Airport Specific Economic Impacts

For this research project for SCAC, all economic impacts were assigned to the following categories: direct impacts, indirect/induced impacts, and total annual economic impacts. These categories are described below:

- **Direct Impacts:** Direct economic impacts are the start of the economic impact cycle measured in this report. For this study, information concerning direct impacts were collected from airports or airport tenants, from SCAC, the FAA, USDOT, and/or from South Carolina's visitors who arrive by air. Since direct impacts can be measured/counted, it is important that these impacts be accurate and credible.
- **Indirect/Induced Impacts:** When direct impacts enter state and local economies, they re-circulate or multiply, creating additional waves of economic impact. Impacts in this category are often referred to as multiplier impacts. For example, when a "direct" airport employee uses his or her payroll to buy



groceries, pay for child care, or take their family pet to a local veterinarian, the direct airport-related payroll is being infused into other sectors of the economy, creating indirect/induced economic impacts. Indirect impacts are most often associated with multipliers in the industrial, distribution, professional services, or utility sectors of the economy. Induced impacts are most often associated with multiplier impacts in the retail and service sectors of the economy. Later sections of this report provide more information on the modeling process used in this study to estimate indirect/induced economic impacts.

- **Total Economic Impacts:** For this study, total impacts are the sum of direct and indirect/induced impacts in each of the measurement categories.

### 3.0 DIRECT ECONOMIC IMPACTS FOR COMMERCIAL AND GENERAL AVIATION AIRPORTS

As indicated, all economic impacts for the commercial and general aviation airports discussed in this report start with impacts in the direct impact category. The following sections discuss direct economic impacts that were identified for activities in the airport management, airport tenant, capital investment, and both air visitor categories.

All direct economic impacts for the public airports included in this report start with the daily operation of the airports; activities needed to serve customers and aircraft using each airport; and steps the airports take to maintain, improve, and expand their infrastructure. While not all direct impacts discussed take place on-airport, all direct impacts are linked to the airports and their operations.

#### 3.1 Estimates of Direct Impacts for Airport Management for Commercial Airports

For this report, the South Carolina airports served as the primary source for identifying direct impacts in this category. Through surveys, on-site visits, and phone interviews, airports provided information on airport management related employment, payroll, and the airport's annual non-capital and non-payroll spending for goods and services. As part of this study, when all direct impacts were documented, each airport manager was provided with the opportunity to review results that showed direct impacts identified through the study's data gathering process. This review enabled each airport to verify information that served as the basis for their airport's annual economic impact estimated in this study.

Because of confidentiality, direct airport management impacts for general aviation airports are not published. Many general aviation airports in South Carolina have only one or two employees in the airport management category. Further, for many of South Carolina's general aviation airports, the airport sponsor (city or county) has taken over fixed base operator (FBO) responsibilities. In these instances, the municipality functions in both the management and the tenant categories. For South Carolina's general aviation airports, direct impacts for airport management and airport tenants have been combined.

**Table 1 – Direct Airport Management Employment and Annual Economic Activity For Commercial Airports** provides information that shows direct full-time equivalent jobs estimated for each commercial service airport, along with their reported direct annual economic activity, this includes spending for goods and services and payroll. Jobs shown in **Table 1** are the sum of all full-time on and off-airport jobs, all part-time on- and off-airport jobs (translated into full-time jobs based on the number of hours worked by each airport employee), and all seasonal jobs (translated into full-time jobs based on the number of hours worked for the airport). Annual economic activity (payroll and spending) in the airport management category was obtained from each commercial airport, as was the information on employment presented in **Table 1**.

As indicated, direct economic impacts for all general aviation airports are combined with direct impacts from airport tenants. Employment to operate some general aviation airports is so minimal that it does not equate to one full-time job. In some instances, general aviation airports are also operated by non-compensated volunteers. In these instances, there is no direct employment in the airport management category for these general aviation airports. Also, some airports are operated by Fixed Base Operators (FBOs); if this is the case, then the direct economic activity for the airport management function is more appropriately reported in the airport tenant category. Direct annual economic activity for general aviation airports in the airport management category is reported in **Table 3 – Direct Airport Management And Tenant Impacts Combined For General Aviation Airports**.

TABLE 1 – DIRECT AIRPORT MANAGEMENT EMPLOYMENT AND ANNUAL ECONOMIC ACTIVITY FOR COMMERCIAL AIRPORTS

FAA ID	Associated City	Airport Name	Direct Employment	Direct Annual Economic Activity
CHS	Charleston	Charleston International Airport	186	\$17,914,090
CAE	Columbia	Columbia Metropolitan Airport	65	\$8,345,900
FLO	Florence	Florence Regional Airport	14	\$2,348,160
GSP	Greer	Greenville-Spartanburg International (Roger Milliken Field)	161	\$17,094,800
HXD	Hilton Head Island	Hilton Head Airport	15	\$1,160,000
MYR	Myrtle Beach	Myrtle Beach International Airport	126	\$12,278,030
Commercial Airports Total			567	\$59,140,980

Source: Study Airports

### 3.2 Estimates of Direct Impacts for Airport Tenants at Commercial Airports and Combined Airport Management and Tenant Impacts for General Aviation Airports

SCAC and study airports provided information for all on-airport aviation-related tenants that do business and provide services at the South Carolina airports. All tenants at commercial and general aviation airports were contacted on several occasions either in person, by email, by mail, or by phone to obtain information on the types of services they provide; their full-time, part-time, and seasonal employment; their annual payroll; and their annual expenditures to purchase goods and services to run their business. Tenants at airports change occasionally. Information for tenant impacts presented in this report represents conditions at the time data collection for this study was conducted.

Study research showed that some of the smaller general aviation airports do not have aviation-related tenants. Some general aviation airports only report one on-site tenant. Therefore, to protect confidentiality, direct impacts for airport tenants at South Carolina's general aviation airports are combined with direct impacts identified in the airport management category. **Table 2 – Direct Airport Tenant Employment and Annual Economic Activity for Commercial Airports** reflects direct tenant impacts for South Carolina's commercial airports. Annual economic activity shown in **Table 2** represents combined payroll and annual purchases for goods and services by all aviation tenants identified at each commercial airport. Direct annual tenant economic activity shown in **Table 2** does not reflect spending for capital projects, as this spending is accounted for in another activity center. **Table 2** provides total full-time tenant related jobs for each airport; part-time and seasonal jobs have been converted to full-time jobs based on the reported number of hours these employees worked directly in support of the airport.

TABLE 2 – DIRECT AIRPORT TENANT EMPLOYMENT AND ANNUAL ECONOMIC ACTIVITY FOR COMMERCIAL AIRPORTS

FAA ID	Associated City	Airport Name	Number of Tenants	Direct Tenant Employment	Direct Economic Activity
CHS	Charleston	Charleston International Airport*	37	1,530	\$197,078,400
CAE	Columbia	Columbia Metropolitan Airport	28	737	\$110,756,560
FLO	Florence	Florence Regional Airport	8	68	\$9,933,330
GSP	Greer	Greenville-Spartanburg International (Roger Milliken Field)	22	720	\$105,132,710
HXD	Hilton Head Island	Hilton Head Airport	14	85	\$13,484,400
MYR	Myrtle Beach	Myrtle Beach International Airport	32	633	\$85,005,910
Commercial Airports Total*			141	3,773	\$521,391,310

\*Boeing not included

Source: Airport Tenants and Airport Management

For South Carolina's general aviation airports, **Table 3 – Direct Airport Management And Tenant Impacts Combined For General Aviation Airports** provides information on direct employment and economic activity (payroll and spending) for each general aviation airport. Information presented in **Table 3** was obtained for management representatives at each of the general aviation airports or from the aviation related tenants doing business at each airport.

TABLE 3 – DIRECT AIRPORT MANAGEMENT AND TENANT IMPACTS COMBINED FOR GENERAL AVIATION AIRPORTS

FAA ID	Associated City	Airport Name	Direct Employment	Direct Payroll	Direct Spending	Direct Annual Economic Activity
AIK	Aiken	Aiken Regional Airport	30	\$1,434,100	\$6,332,340	\$7,766,440
AQX	Allendale	Allendale County Airport	5	\$190,230	\$382,520	\$572,750
AND	Anderson	Anderson Regional Airport	24	\$1,055,230	\$1,585,510	\$2,640,740
PHH	Andrews	Robert F. Swinnie Airport	2	\$75,540	\$172,870	\$248,410
99N	Bamberg	Bamberg County Airport	<1	\$27,500	\$10,000	\$37,500
BNL	Barnwell	Barnwell Regional Airport	3	\$120,000	\$49,880	\$169,880
ARW	Beaufort	Beaufort County Airport	13	\$679,690	\$771,570	\$1,451,260
BBP	Bennettsville	Marlboro County Airport - HE Avent Field	2	\$56,750	\$196,600	\$253,350
52J	Bishopville	Lee County Airport-Butters Field	2	\$79,000	\$47,170	\$126,170
CDN	Camden	Woodward Field	17	\$914,040	\$1,616,080	\$2,530,120
JZI	Charleston	Charleston Executive Airport	33	\$1,542,700	\$3,926,360	\$5,469,060
CQW	Cheraw	Cheraw Municipal/Lynch Bellinger Field	4	\$129,000	\$279,190	\$408,190
DCM	Chester	Chester Catawba Regional Airport	19	\$714,000	\$1,310,390	\$2,024,390
CEU	Clemson	Oconee County Regional Airport	15	\$736,450	\$807,630	\$1,544,080
CUB	Columbia	Jim Hamilton - LB Owens Airport	23	\$940,540	\$3,038,520	\$3,979,060
HYW	Conway	Conway-Horry County Airport	20	\$1,138,190	\$2,014,760	\$3,152,950

TABLE 3 – DIRECT AIRPORT MANAGEMENT AND TENANT IMPACTS COMBINED FOR GENERAL AVIATION  
AIRPORTS

FAA ID	Associated City	Airport Name	Direct Employment	Direct Payroll	Direct Spending	Direct Annual Economic Activity
UDG	Darlington	Darlington County Airport	8	\$710,000	\$736,590	\$1,446,590
DLC	Dillon	Dillon County Airport	<1	\$20,000	\$20,000	\$40,000
GGE	Georgetown	Georgetown County Airport	11	\$480,000	\$1,513,800	\$1,993,800
GMU	Greenville	Greenville Downtown Airport	181	\$12,402,200	\$18,294,880	\$30,697,080
GYH	Greenville	Donaldson Field	841	\$68,673,380	\$208,098,640	\$276,772,020
GRD	Greenwood	Greenwood County Airport	12	\$632,000	\$1,680,690	\$2,312,690
3J0	Hampton	Hampton County Airport	13	\$770,000	\$1,042,810	\$1,812,810
HVS	Hartsville	Hartsville Regional Airport	2	\$102,720	\$287,200	\$389,920
CKI	Kingsree	Williamsburg Regional Airport	8	\$306,600	\$920,380	\$1,226,980
51J	Lake City	Lake City Municipal Airport CJ Evans Field	-	\$18,820	\$7,700	\$26,520
LKR	Lancaster	Lancaster County-McWhirter Field	3	\$134,500	\$258,340	\$392,840
LUX	Laurens	Laurens County Airport	4	\$144,250	\$93,950	\$238,200
5J9	Loris	Twin City Airport	<1	\$20,000	\$18,770	\$38,770
MNI	Manning	Santee Cooper Regional Airport	5	\$146,750	\$580,100	\$726,850
MAO	Marion	Marion County Airport	13	\$803,600	\$1,103,030	\$1,906,630
S19	McCormick	McCormick County Airport	<1	\$25,090	\$10,000	\$35,090
MKS	Moncks Corner	Berkeley County Airport	8	\$355,050	\$546,630	\$901,680
LRO	Mount Pleasant	Mt Pleasant Regional-Faison Field	11	\$385,000	\$480,260	\$865,260
EOE	Newberry	Newberry County Airport	3	\$121,250	\$122,580	\$243,830
CRE	North Myrtle Beach	Grand Strand Airport	31	\$1,411,050	\$2,208,620	\$3,619,670
OGB	Orangeburg	Orangeburg Municipal Airport	6	\$310,000	\$520,860	\$830,860
PYG	Pageland	Pageland Airport	<1	\$20,000	\$15,000	\$35,000
6J0	Pelion	Lexington County Airport	1	\$20,000	\$72,590	\$92,590
LQK	Pickens	Pickens County Airport	11	\$443,700	\$552,080	\$995,780
3J1	Ridgeland	Ridgeland-Claude Dean Airport	9	\$353,950	\$753,880	\$1,107,830
UZA	Rock Hill	Rock Hill/York Co/Bryant Field	62	\$4,152,000	\$12,540,300	\$16,692,300
6J4	Saluda	Saluda County Airport	2	\$40,000	\$103,950	\$143,950
SPA	Spartanburg	Spartanburg Downtown Memorial Airport	84	\$4,568,130	\$8,012,840	\$12,580,970
6J2	St George	St. George Airport	1	\$20,390	\$17,430	\$37,820
DYB	Summerville	Summerville Airport	8	\$303,900	\$670,300	\$974,200
SMS	Sumter	Sumter Airport	29	\$2,210,600	\$3,538,640	\$5,749,240
6J6	Trenton	Edgefield County Airport	<1	\$20,000	\$27,380	\$47,380
35A	Union	Union County, Troy Shelton Field	6	\$246,250	\$367,610	\$613,860
RBW	Walterboro	Lowcountry Regional Airport	29	\$1,519,260	\$3,218,740	\$4,738,000

TABLE 3 – DIRECT AIRPORT MANAGEMENT AND TENANT IMPACTS COMBINED FOR GENERAL AVIATION AIRPORTS

FAA ID	Associated City	Airport Name	Direct Employment	Direct Payroll	Direct Spending	Direct Annual Economic Activity
FDW	Winnsboro	Fairfield County Airport	9	\$363,250	\$1,117,590	\$1,480,840
		<b>General Aviation Airports Total</b>	<b>1,629</b>	<b>\$112,086,650</b>	<b>\$292,095,550</b>	<b>\$404,182,200</b>

Source: Airport Tenants and Airport Management

Although this report does not specifically call out South Carolina’s aviation-related military impacts, there are several major DOD (Department of Defense) related tenants included in the study that are worth mentioning separately from their civilian counterparts. Of note are Lockheed Martin and the South Carolina Army National Guard, both located at Donaldson Field (GYH) in Greenville. Lockheed Martin, a major defense contractor involved in the production of F-16 fighter jets, supports 500 jobs, while the South Carolina Army National Guard employs 78 personnel. Together, these two DOD-related tenants comprise approximately 70% of Donaldson Field’s direct employment and 75% of its direct economic activity. Donaldson Field has the highest economic impact of all general aviation airports in South Carolina.

Although not military-related, the impact of Boeing at Charleston International Airport, which is the largest single tenant in the state, is covered separately in Section 3.4.

### 3.3 Estimates of Direct Impacts for Capital Investment

As indicated, while direct capital investment is on-going at an airport, this investment supports employment and payroll over the actual duration of the project’s implementation. Each airport’s direct economic impact, in this category, has the potential to change between cycles for measuring airport-related economic impact. This is because capital investment at any given airport changes year-to-year.

For this study, direct capital investment impacts were estimated using information supplied by SCAC, the FAA, study airports, and tenants at the airports. The goal was to capture all investment that has been made at the airports by local, state, and federal governments, as well as to consider private and airport investment. Local investment, although not entirely, is made primarily to match state and FAA grants. Private investment, at some study airports, has also taken place, primarily to build hangars.

Since capital investment at South Carolina airports changes year-to-year, average annual investment, both public and private, over a multi-year historic period was used to estimate direct impacts in this category. Impacts in this category consider only investment that has already been made; it does not include investment planned in the future.

In the capital investment impact category, average annual capital investment, statewide and airport specific, equates to “annual economic activity” (as defined in this study) since reported values reflect both the cost of materials and labor. Once average annual CIP economic activity is established, information in the IMPLAN model is used to estimate direct employment and payroll for this impact category. The model provides information that indicates the portion of each airport’s annual CIP economic activity that is labor-related versus the portion allocated to goods, materials, and supplies. IMPLAN is discussed in detail in **Discussion and Measurement of Indirect/Induced Economic Impacts**.

**Table 4 – Direct Impacts from Average Annual Capital Investment** provides average annual direct economic activity for each public airport in the capital investment category.



For the information presented in **Table 4**, the reported economic activity is associated not just with SCAC and FAA grants. The economic activity also reflects local investment and private (tenant) investment. For the commercial airports, a portion of the investment may have been funded with Passenger Facility Charge (PFC) collections and surplus revenue. For the historic period considered for this economic impact category, the commercial airports serving both Charleston and Greenville-Spartanburg were completing large terminal projects. Spending for these projects contributed to the estimated \$179 million for average annual capital investment.

TABLE 4 – DIRECT IMPACTS FROM AVERAGE ANNUAL CAPITAL INVESTMENT

FAA ID	Associated City	Airport Name	Direct Employment	Direct Payroll	Direct Spending	Direct Annual Economic Activity
CHS	Charleston	Charleston International Airport*	280	\$13,989,190	\$40,116,020	\$54,105,210
CAE	Columbia	Columbia Metropolitan Airport	56	\$2,589,600	\$7,675,160	\$10,264,760
FLO	Florence	Florence Regional Airport	17	\$683,490	\$2,203,730	\$2,887,220
GSP	Greer	Greenville-Spartanburg International (Roger Milliken Field)	135	\$6,874,550	\$19,595,720	\$26,470,270
HXD	Hilton Head Island	Hilton Head Airport	36	\$1,737,480	\$5,075,880	\$6,813,360
MYR	Myrtle Beach	Myrtle Beach International Airport	177	\$7,794,380	\$23,646,390	\$31,440,770
		<b>Commercial Airports Total*</b>	<b>701</b>	<b>\$33,668,690</b>	<b>\$98,312,900</b>	<b>\$131,981,590</b>
AIK	Aiken	Aiken Regional Airport	4	\$200,970	\$587,290	\$788,260
AQX	Allendale	Allendale County Airport	-	\$6,670	\$19,790	\$26,460
AND	Anderson	Anderson Regional Airport	9	\$453,480	\$1,276,380	\$1,729,860
PHH	Andrews	Robert F. Swinnie Airport	1	\$42,170	\$127,950	\$170,120
99N	Bamberg	Bamberg County Airport	-	\$14,210	\$42,180	\$56,390
BNL	Barnwell	Barnwell Regional Airport	1	\$55,050	\$163,440	\$218,490
ARW	Beaufort	Beaufort County Airport	2	\$85,960	\$251,110	\$337,070
BBP	Bennettsville	Marlboro County Airport - HE Avent Field	1	\$62,850	\$186,590	\$249,440
52J	Bishopville	Lee County Airport-Butters Field	1	\$68,730	\$204,030	\$272,760
CDN	Camden	Woodward Field	6	\$270,800	\$802,620	\$1,073,420
JZI	Charleston	Charleston Executive Airport	10	\$516,720	\$1,481,770	\$1,998,490
CQW	Cheraw	Cheraw Municipal/Lynch Bellinger Field	2	\$110,010	\$326,570	\$436,580
DCM	Chester	Chester Catawba Regional Airport	2	\$79,630	\$236,390	\$316,020
CEU	Clemson	Oconee County Regional Airport	4	\$203,020	\$602,720	\$805,740
CUB	Columbia	Jim Hamilton - LB Owens Airport	9	\$440,940	\$1,306,880	\$1,747,820
HYW	Conway	Conway-Horry County Airport	2	\$81,540	\$247,380	\$328,920
UDG	Darlington	Darlington County Airport	3	\$121,360	\$391,300	\$512,660
DLC	Dillon	Dillon County Airport	-	\$0	\$0	\$0
GGE	Georgetown	Georgetown County Airport	7	\$296,880	\$900,660	\$1,197,540
GMU	Greenville	Greenville Downtown Airport	7	\$356,480	\$1,003,370	\$1,359,850
GYH	Greenville	Donaldson Field	17	\$869,540	\$2,447,440	\$3,316,980
GRD	Greenwood	Greenwood County Airport	4	\$192,870	\$572,570	\$765,440

TABLE 4 – DIRECT IMPACTS FROM AVERAGE ANNUAL CAPITAL INVESTMENT

FAA ID	Associated City	Airport Name	Direct Employment	Direct Payroll	Direct Spending	Direct Annual Economic Activity
3J0	Hampton	Hampton County Airport	-	\$14,740	\$43,750	\$58,490
HVS	Hartsville	Hartsville Regional Airport	2	\$93,280	\$300,770	\$394,050
CKI	Kingstree	Williamsburg Regional Airport	3	\$150,530	\$446,880	\$597,410
51J	Lake City	Lake City Municipal Airport CJ Evans Field	-	\$3,370	\$10,000	\$13,370
LKR	Lancaster	Lancaster County-McWhirter Field	6	\$290,620	\$862,770	\$1,153,390
LUX	Laurens	Laurens County Airport	4	\$217,750	\$612,880	\$830,630
5J9	Loris	Twin City Airport	-	\$3,970	\$12,030	\$16,000
MNI	Manning	Santee Cooper Regional Airport	1	\$51,600	\$153,180	\$204,780
MAO	Marion	Marion County Airport	1	\$47,430	\$140,790	\$188,220
S19	McCormick	McCormick County Airport	-	\$0	\$0	\$0
MKS	Moncks Corner	Berkeley County Airport	9	\$467,970	\$1,341,970	\$1,809,940
LRO	Mount Pleasant	Mt Pleasant Regional-Faison Field	5	\$231,540	\$663,960	\$895,500
EOE	Newberry	Newberry County Airport	14	\$669,570	\$1,987,770	\$2,657,340
CRE	North Myrtle Beach	Grand Strand Airport	8	\$333,030	\$1,010,330	\$1,343,360
OGB	Orangeburg	Orangeburg Municipal Airport	2	\$97,360	\$289,050	\$386,410
PYG	Pageland	Pageland Airport	2	\$71,750	\$213,010	\$284,760
6J0	Pelion	Lexington County Airport	5	\$232,040	\$687,740	\$919,780
LQK	Pickens	Pickens County Airport	5	\$243,120	\$684,300	\$927,420
3J1	Ridgeland	Ridgeland-Claude Dean Airport	19	\$916,700	\$2,678,060	\$3,594,760
UZA	Rock Hill	Rock Hill/York Co/Bryant Field	10	\$442,310	\$1,313,090	\$1,755,400
6J4	Saluda	Saluda County Airport	1	\$52,310	\$155,040	\$207,350
SPA	Spartanburg	Spartanburg Downtown Memorial Airport	34	\$1,644,130	\$4,873,170	\$6,517,300
6J2	St George	St. George Airport	-	\$19,040	\$54,610	\$73,650
DYB	Summerville	Summerville Airport	5	\$243,200	\$697,400	\$940,600
SMS	Sumter	Sumter Airport	10	\$475,230	\$1,410,830	\$1,886,060
6J6	Trenton	Edgefield County Airport	-	\$0	\$0	\$0
35A	Union	Union County, Troy Shelton Field	1	\$39,840	\$118,090	\$157,930
RBW	Walterboro	Lowcountry Regional Airport	3	\$138,270	\$410,490	\$548,760
FDW	Winnsboro	Fairfield County Airport	5	\$253,440	\$751,160	\$1,004,600
		<b>General Aviation Airports Total</b>	<b>247</b>	<b>\$11,974,020</b>	<b>\$35,101,550</b>	<b>\$47,075,570</b>
		<b>All Airports Total*</b>	<b>948</b>	<b>\$45,642,710</b>	<b>\$133,414,450</b>	<b>\$179,057,160</b>

\*Boeing not included

Source: South Carolina Aeronautics Commission, FAA, Airport Managers, Airport Tenants

### 3.4 Estimates of Direct Impacts from Boeing Commercial Airplane Division

Boeing South Carolina is one of largest single site employers in the state. The operations of this major aviation-related employer are primarily located at the Charleston International Airport. Due to the magnitude of this single tenant's economic impact on the state's economy, Boeing economic impacts are discussed separately in some portions of the state study. Boeing's impacts are associated with two categories: "tenant-related" impacts that come from the day-to-day operation of Boeing's business in Charleston and from the capital investment that Boeing has made in their facilities at Charleston International.

Boeing started their operations in the Charleston area in the 2008/2009 time frame when they acquired the interests of two of their former suppliers, Vought and Global Aeronautics. Boeing's Charleston facility officially opened in 2011, becoming one of only two sites in the United States for the manufacturing and assembly of the Boeing 787 Dreamliner. Not all components for the Dreamliner are manufactured in Charleston. Other sections of the plane are manufactured in Italy and Japan, then air lifted to Charleston on one of two 747 Dreamlifter air cargo aircraft that are based at Charleston International.

Boeing's facilities at Charleston International include a 1.2-million-square-foot aircraft production and assembly facility. In 2014, the company broke ground for a 360,000-square-foot aircraft painting facility. Previously, painting of the Dreamliner was done elsewhere. The paint facility has two paint bays and can accommodate aircraft with a wingspan of 200 feet.

Similar to other aviation-related tenants at airports in South Carolina, Boeing has economic impacts for employment, payroll, spending, and economic activity. Also, because of the significant investment that Boeing has made at Charleston International, the area's economy has also realized significant economic impact from capital investment over the historic investment time frame considered in this study. **Table 5 – Direct Impacts from Boeing South Carolina** presents direct impacts for Boeing in the tenant and capital investment categories.

TABLE 5 – DIRECT IMPACTS FROM BOEING SOUTH CAROLINA

Impact Type	Direct Employment	Direct Payroll	Direct Spending	Direct Annual Economic Activity
Boeing Tenant Impacts	6,943	\$963,550,130	\$1,728,052,410	\$2,691,602,540
Boeing Capital Investment Impacts	574	\$27,512,180	\$80,407,090	\$107,919,270
<b>Total</b>	<b>7,517</b>	<b>\$991,062,310</b>	<b>\$1,808,459,500</b>	<b>\$2,799,521,810</b>

Source: Boeing and Charleston Metro Chamber of Commerce

### 3.5 Estimates of Direct Impacts from General Aviation Visitors

Estimates of general aviation visitors are not available from any existing data sources. Therefore, to estimate general aviation visitors, this study considered both bottom-up and top-down approaches.

For the bottom-up approach, South Carolina airports provided estimates of the number of visiting general aviation aircraft each airport accommodates during an average week. Airports also provided an estimate for the mix of their weekly visiting general aviation aircraft (single-engine, multi-engine, and jet). The typical number of visitors that arrive on each type of visiting aircraft was also provided by the study airports. As a check on these bottom-up estimates, SCAC analyzed FAA data from the National Off-Load Program (NOP). This information identifies most aircraft using each airport, the frequency of their use, and the aircraft operational mix.

For a top-down approach to estimate visiting general aviation aircraft, information from the Aircraft Owners and Pilots Association (AOPA) was used. AOPA states that “on average” 30% of an airport’s total annual itinerant arrivals are visiting or transient aircraft. Annual general aviation itinerant arrivals for each airport were obtained from FAA’s 5010 Form; for airports with air traffic control towers, tower data was the source for air taxi and itinerant general aviation operations.

Transient (visiting) arrivals are only a portion of each airport’s total annual general aviation itinerant arrivals. The other portion of each airport’s itinerant arrivals is attributed to aircraft based at the airport. Transient or visiting aircraft arrivals should always be lower than total annual itinerant arrivals.

The results of the bottom-up and top-down approaches were compared and discussed with SCAC staff. Ultimately, a preferred estimate of total annual visiting general aviation aircraft for each airport was selected through this process. Estimates of visiting general aviation aircraft were also shared with study airports before they were finalized.

Final estimates of annual visiting aircraft arrivals were used to develop an estimate of annual general aviation visitors for each airport. This was accomplished by first applying airport specific estimates for the typical mix of visiting aircraft. Then survey estimates for the average number of visitors (pilots/passengers) per arrival, by aircraft type, were applied to the resultant visiting aircraft fleet. This process led to final estimates for each airport’s annual general aviation visitors. For this study, all estimates of visiting general aviation aircraft are individualized by airport; a standard method for estimating visiting aircraft was not employed in this analysis.

**Table 6 – Estimates of General Aviation Visitors** provides the following for each study airport: an estimate of total annual visiting general aviation aircraft arrivals and an estimate of total annual general aviation visitors. As **Table 6** shows, the total number of annual visitors estimated to arrive in South Carolina annually on general aviation aircraft is nearly 532,000.

TABLE 6 – ESTIMATES OF GENERAL AVIATION VISITORS

FAA ID	Associated City	Airport Name	Annual Visiting/Transient General Aviation Arrivals	Estimated General Aviation Visitors
CHS	Charleston	Charleston International Airport	12,775	67,740
CAE	Columbia	Columbia Metropolitan Airport	7,665	34,157
FLO	Florence	Florence Regional Airport	4,745	8,351
GSP	Greer	Greenville-Spartanburg International (Roger Milliken Field)	3,730	21,175
HXD	Hilton Head Island	Hilton Head Airport	10,220	30,734
MYR	Myrtle Beach	Myrtle Beach International Airport	16,425	33,003
<b>Commercial Airports Total</b>			<b>55,560</b>	<b>195,160</b>
AIK	Aiken	Aiken Regional Airport	6,205	23,642
AQX	Allendale	Allendale County Airport	730	2,953
AND	Anderson	Anderson Regional Airport	4,380	13,912
PHH	Andrews	Robert F. Swinnie Airport	365	775
99N	Bamberg	Bamberg County Airport	156	401
BNL	Barnwell	Barnwell Regional Airport	730	2,076
ARW	Beaufort	Beaufort County Airport	5,475	12,689
BBP	Bennettsville	Marlboro County Airport - HE Avent Field	730	1,888

TABLE 6 – ESTIMATES OF GENERAL AVIATION VISITORS

FAA ID	Associated City	Airport Name	Annual Visiting/Transient General Aviation Arrivals	Estimated General Aviation Visitors
52J	Bishopville	Lee County Airport-Butters Field	261	521
CDN	Camden	Woodward Field	1,095	3,510
JZI	Charleston	Charleston Executive Airport	6,935	25,806
CQW	Cheraw	Cheraw Municipal/Lynch Bellinger Field	1,095	3,083
DCM	Chester	Chester Catawba Regional Airport	1,095	3,145
CEU	Clemson	Oconee County Regional Airport	4,198	14,086
CUB	Columbia	Jim Hamilton - LB Owens Airport	5,110	14,195
HYW	Conway	Conway-Horry County Airport	2,555	6,744
UDG	Darlington	Darlington County Airport	730	2,651
DLC	Dillon	Dillon County Airport	261	300
GGE	Georgetown	Georgetown County Airport	3,285	10,320
GMU	Greenville	Greenville Downtown Airport	16,425	30,530
GYH	Greenville	Donaldson Field	5,475	10,338
GRD	Greenwood	Greenwood County Airport	3,650	5,250
3J0	Hampton	Hampton County Airport	156	322
HVS	Hartsville	Hartsville Regional Airport	730	1,910
CKI	Kingstree	Williamsburg Regional Airport	365	1,242
51J	Lake City	Lake City Municipal Airport CJ Evans Field	261	304
LKR	Lancaster	Lancaster County-McWhirter Field	1,825	4,588
LUX	Laurens	Laurens County Airport	1,095	2,379
5J9	Loris	Twin City Airport	261	679
MNI	Manning	Santee Cooper Regional Airport	1,095	2,691
MAO	Marion	Marion County Airport	548	1,499
S19	McCormick	McCormick County Airport	156	200
MKS	Moncks Corner	Berkeley County Airport	2,190	5,717
LRO	Mount Pleasant	Mt Pleasant Regional-Faison Field	2,555	6,280
EOE	Newberry	Newberry County Airport	1,095	2,986
CRE	North Myrtle Beach	Grand Strand Airport	7,665	22,532
OGB	Orangeburg	Orangeburg Municipal Airport	2,555	7,692
PYG	Pageland	Pageland Airport	548	1,130
6J0	Pelion	Lexington County Airport	1,095	1,100
LQK	Pickens	Pickens County Airport	2,555	8,466
3J1	Ridgeland	Ridgeland-Claude Dean Airport	730	1,540
UZA	Rock Hill	Rock Hill/York Co/Bryant Field	6,205	18,384
6J4	Saluda	Saluda County Airport	261	557
SPA	Spartanburg	Spartanburg Downtown Memorial Airport	6,570	20,385



TABLE 6 – ESTIMATES OF GENERAL AVIATION VISITORS

FAA ID	Associated City	Airport Name	Annual Visiting/Transient General Aviation Arrivals	Estimated General Aviation Visitors
6J2	St George	St. George Airport	261	657
DYB	Summerville	Summerville Airport	2,190	5,516
SMS	Sumter	Sumter Airport	2,555	9,302
6J6	Trenton	Edgefield County Airport	183	365
35A	Union	Union County, Troy Shelton Field	730	1,598
RBW	Walterboro	Lowcountry Regional Airport	4,015	13,897
FDW	Winnsboro	Fairfield County Airport	1,460	3,754
General Aviation Airports Total			122,849	336,484
All Airports Total			178,408	531,644

Source: Airport Managers, South Carolina Aeronautics Commission, FAA National Offload Program (NOP) Data, Aircraft Owners and Pilots Association (AOPA)

Using final general aviation visitor estimates from **Table 6**, information from visitor surveys (conducted for this study) on trip duration and spending per trip was used to estimate total annual general aviation spending for this impact category. Airports and/or FBOs in South Carolina assisted in the process to distribute surveys to general aviation visitors. General aviation visitors were asked to provide information on the purpose of their trip; the duration of their stay; and the amount of money that they spent for various categories such as lodging, food, retail, ground transportation, and entertainment.

It is important to note that many general aviation visitors who arrive in South Carolina on a general aviation plane stay for less than one day, and some stay only a few hours. Visitors in the “day trip” category have little to no spending. On a statewide basis, study investigation showed that percent of day visitors for the study airports ranges from a low of 40% of all visitors to a high of 85%. This means that the remaining 60% to 15% of the general aviation visitors, respectively, spend one or more nights in South Carolina on their trip.

As would be expected, trip purpose for general aviation visitors using airports in South Carolina also varies. For airports serving areas around Columbia, Greenville/Spartanburg, and Florence, the majority of general aviation visitor trips are business related. Survey information showed that if general aviation visitors to South Carolina are traveling for business, their length of stay is typically one night.

General aviation visitors who indicated the purpose of their travel is leisure related tend to have longer stays, especially when they arrive at one of the airports serving South Carolina’s coastal areas. South Carolina is famous for its golf, food, beaches, and history, and many general aviation visitors in the leisure category stay for several days, or even weeks.

General aviation visitor purchases for aviation fuel are not measured in the spending for this impact category. Aviation fuel purchases go toward supporting jobs, payroll, and spending for the entity providing fuel at each airport. Counting spending for fuel purchases in the general aviation visitor category would result in double-counting of economic impacts. The impacts of general aviation fuel purchases are reflected in either the airport management or the tenant categories. While direct spending associated with general aviation visitors was reported for all airports, in some cases this spending was not significant enough to support at least one job or the payroll associated with that job. Also for a few of the general aviation airports, including Aiken Regional and Rock Hill, some of the visitors arriving at these airports actually have spending in other nearby states; accordingly, visitor spending that does not take place in South Carolina was not measured in this analysis.

Once direct annual visitor spending was estimated, information from the IMPLAN model (discussed in the next section) was used to determine the number of direct jobs and direct payroll that direct annual visitor economic activity supports. Direct employment and payroll supported by general aviation visitor spending in South Carolina is primarily, but not exclusively, associated with off-airport establishments. Spending by visitors to South Carolina arriving on general aviation aircraft helps primarily to support jobs associated with hotels, rental properties, entertainment venues, and restaurants in the state.

**Table 7 – General Aviation Visitor Direct Employment, Payroll, Spending, and Annual Economic Activity** provides information on direct economic activity supported by general aviation spending. As noted, the estimate of annual general aviation visitor spending was derived from surveys, interviews, and research conducted specifically for this study. Estimates of direct employment and payroll in this impact category are based on ratios in the IMPLAN model. In the table below, economic activity resulting from visitors arriving on general aviation aircraft supports the values reported for both payroll and spending, while direct annual economic activity is the sum of payroll and spending.

Total economic activity was estimated based on average economic activity per visitor per trip. Average spending per visitor trip is different for each South Carolina airport. Average spending per visitor trip considers not only those visitors who spend at least one night, but also those general aviation visitors who come only for the day and have limited or no spending associated with their trip. Airports having higher percentages of visitors in the day trip category have lower average spending per visitor trip, and the results are reflected in the information presented in **Table 7**.

TABLE 7 – GENERAL AVIATION VISITOR DIRECT EMPLOYMENT, PAYROLL, SPENDING, AND ANNUAL ECONOMIC ACTIVITY

FAA ID	Associated City	Airport Name	Direct Employment	Direct Payroll	Direct Spending	Direct Annual Economic Activity
CHS	Charleston	Charleston International Airport	894	\$24,658,320	\$61,291,150	\$85,949,470
CAE	Columbia	Columbia Metropolitan Airport	234	\$5,105,520	\$14,858,300	\$19,963,820
FLO	Florence	Florence Regional Airport	23	\$410,990	\$1,302,760	\$1,713,750
GSP	Greer	Greenville-Spartanburg International (Roger Milliken Field)	138	\$3,452,810	\$9,528,750	\$12,981,560
HXD	Hilton Head Island	Hilton Head Airport	279	\$8,338,340	\$21,280,220	\$29,618,560
MYR	Myrtle Beach	Myrtle Beach International Airport	400	\$10,003,340	\$26,772,030	\$36,775,370
		<b>Commercial Airports Total</b>	<b>1,968</b>	<b>\$51,969,320</b>	<b>\$135,033,210</b>	<b>\$187,002,530</b>
AIK	Aiken	Aiken Regional Airport	79	\$1,291,730	\$4,258,480	\$5,550,210
AQX	Allendale	Allendale County Airport	6	\$143,890	\$380,200	\$524,090
AND	Anderson	Anderson Regional Airport	37	\$906,710	\$2,453,430	\$3,360,140
PHH	Andrews	Robert F. Swinnie Airport	1	\$18,680	\$48,180	\$66,860
99N	Bamberg	Bamberg County Airport	-	\$9,280	\$24,530	\$33,810
BNL	Barnwell	Barnwell Regional Airport	6	\$137,920	\$366,550	\$504,470
ARW	Beaufort	Beaufort County Airport	56	\$1,604,530	\$3,938,530	\$5,543,060
BBP	Bennettsville	Marlboro County Airport - HE Avent Field	2	\$49,730	\$132,160	\$181,890
52J	Bishopville	Lee County Airport-Butters Field	-	\$12,310	\$32,520	\$44,830
CDN	Camden	Woodward Field	7	\$159,380	\$447,560	\$606,940

TABLE 7 – GENERAL AVIATION VISITOR DIRECT EMPLOYMENT, PAYROLL, SPENDING, AND ANNUAL ECONOMIC ACTIVITY

FAA ID	Associated City	Airport Name	Direct Employment	Direct Payroll	Direct Spending	Direct Annual Economic Activity
JZI	Charleston	Charleston Executive Airport	256	\$7,172,760	\$17,728,740	\$24,901,500
CQW	Cheraw	Cheraw Municipal/Lynch Bellinger Field	3	\$72,340	\$191,130	\$263,470
DCM	Chester	Chester Catawba Regional Airport	5	\$129,590	\$342,410	\$472,000
CEU	Clemson	Oconee County Regional Airport	46	\$1,142,990	\$3,037,630	\$4,180,620
CUB	Columbia	Jim Hamilton - LB Owens Airport	41	\$896,990	\$2,535,890	\$3,432,880
HYW	Conway	Conway-Horry County Airport	17	\$479,590	\$1,207,770	\$1,687,360
UDG	Darlington	Darlington County Airport	9	\$161,540	\$516,900	\$678,440
DLC	Dillon	Dillon County Airport	-	\$6,930	\$18,320	\$25,250
GGE	Georgetown	Georgetown County Airport	90	\$2,302,390	\$5,944,190	\$8,246,580
GMU	Greenville	Greenville Downtown Airport	81	\$1,993,690	\$5,394,650	\$7,388,340
GYH	Greenville	Donaldson Field	32	\$795,260	\$2,151,850	\$2,947,110
GRD	Greenwood	Greenwood County Airport	14	\$356,670	\$947,890	\$1,304,560
3J0	Hampton	Hampton County Airport	-	\$7,640	\$20,180	\$27,820
HVS	Hartsville	Hartsville Regional Airport	6	\$105,090	\$336,270	\$441,360
CKI	Kingstree	Williamsburg Regional Airport	3	\$65,880	\$175,090	\$240,970
51J	Lake City	Lake City Municipal Airport CJ Evans Field	-	\$7,220	\$19,080	\$26,300
LKR	Lancaster	Lancaster County-McWhirter Field	12	\$309,020	\$821,260	\$1,130,280
LUX	Laurens	Laurens County Airport	2	\$55,020	\$148,070	\$203,090
5J9	Loris	Twin City Airport	1	\$16,250	\$41,910	\$58,160
MNI	Manning	Santee Cooper Regional Airport	3	\$62,890	\$166,160	\$229,050
MAO	Marion	Marion County Airport	1	\$34,970	\$92,400	\$127,370
S19	McCormick	McCormick County Airport	-	\$4,680	\$12,380	\$17,060
MKS	Moncks Corner	Berkeley County Airport	14	\$408,740	\$1,009,020	\$1,417,760
LRO	Mount Pleasant	Mt Pleasant Regional-Faison Field	35	\$983,240	\$2,430,250	\$3,413,490
EOE	Newberry	Newberry County Airport	5	\$132,780	\$350,850	\$483,630
CRE	North Myrtle Beach	Grand Strand Airport	229	\$5,828,290	\$15,047,140	\$20,875,430
OGB	Orangeburg	Orangeburg Municipal Airport	21	\$513,010	\$1,363,380	\$1,876,390
PYG	Pageland	Pageland Airport	1	\$26,990	\$71,320	\$98,310
6J0	Pelion	Lexington County Airport	1	\$27,240	\$77,000	\$104,240
LQK	Pickens	Pickens County Airport	23	\$558,150	\$1,510,280	\$2,068,430
3J1	Ridgeland	Ridgeland-Claude Dean Airport	2	\$52,160	\$130,870	\$183,030
UZA	Rock Hill	Rock Hill/York Co/Bryant Field	50	\$1,246,520	\$3,312,780	\$4,559,300
6J4	Saluda	Saluda County Airport	1	\$12,190	\$34,220	\$46,410
SPA	Spartanburg	Spartanburg Downtown Memorial Airport	52	\$1,500,650	\$3,651,950	\$5,152,600

TABLE 7 – GENERAL AVIATION VISITOR DIRECT EMPLOYMENT, PAYROLL, SPENDING, AND ANNUAL ECONOMIC ACTIVITY

FAA ID	Associated City	Airport Name	Direct Employment	Direct Payroll	Direct Spending	Direct Annual Economic Activity
6J2	St George	St. George Airport	1	\$16,660	\$40,820	\$57,480
DYB	Summerville	Summerville Airport	13	\$396,360	\$978,460	\$1,374,820
SMS	Sumter	Sumter Airport	25	\$629,310	\$1,672,470	\$2,301,780
6J6	Trenton	Edgefield County Airport	-	\$6,920	\$22,360	\$29,280
35A	Union	Union County, Troy Shelton Field	1	\$41,650	\$99,860	\$141,510
RBW	Walterboro	Lowcountry Regional Airport	115	\$2,862,890	\$7,608,470	\$10,471,360
FDW	Winnsboro	Fairfield County Airport	4	\$84,230	\$236,520	\$320,750
General Aviation Airports Total			1,409	\$35,841,540	\$93,580,330	\$129,421,870
All Airports Total			3,377	\$87,810,860	\$228,613,540	\$316,424,400

Source: Visitor Surveys and IMPLAN (Charleston Metro Chamber of Commerce)

### 3.6 Estimates of Direct Impacts for Commercial Visitors

Similar to spending related to visitors who arrive on general aviation aircraft, visitors to South Carolina who arrive on scheduled commercial airline flights also have annual spending in the direct impact category. For this study, direct annual impacts related to commercial service visitors were estimated by first identifying each commercial airport's total annual commercial airline passenger enplanements.

After annual passenger enplanements were identified, data from the USDOT was examined to determine the portion of each airport's annual enplanements that are visitors versus residents. For many years, the USDOT has conducted its 10% ticket sample at all commercial airports. This sample provides information on tickets associated with local residents and tickets associated with visitors. USDOT was the source of information for identifying each commercial airport visitors for this analysis.

**Table 8 – Visitors Arriving in South Carolina on Commercial Airlines** provides information on the portion of each airport's enplanements that were assumed to be visitors, as opposed to residents. As **Table 8** shows, the total number of visitors estimated to arrive annually in South Carolina on a commercial airline flight is 2.6 million. It is important to note, this is not the total number of passengers who enplane a scheduled commercial airline flight at a South Carolina airport, it is only the number of passenger enplanements that are visitors.

Once each airport's annual commercial airline visitors were estimated, information collected from visitor surveys, conducted for this study with the help of the commercial airports, was used to develop estimates of average spending per visitor, per trip for each of South Carolina's commercial airports.

TABLE 8 – VISITORS ARRIVING IN SOUTH CAROLINA ON COMMERCIAL AIRLINES

FAA ID	Associated City	Airport Name	Total Annual Commercial Visitors	Percent of Enplanements that are Visitors
CHS	Charleston	Charleston International Airport	1,138,072	58%
CAE	Columbia	Columbia Metropolitan Airport	249,460	47%
FLO	Florence	Florence Regional Airport	20,148	44%

TABLE 8 – VISITORS ARRIVING IN SOUTH CAROLINA ON COMMERCIAL AIRLINES

FAA ID	Associated City	Airport Name	Total Annual Commercial Visitors	Percent of Enplanements that are Visitors
GSP	Greer	Greenville-Spartanburg International (Roger Milliken Field)	465,596	44%
HXD	Hilton Head Island	Hilton Head Airport	21,702	70%
MYR	Myrtle Beach	Myrtle Beach International Airport	735,665	66%
Commercial Airports Total			2,630,643	

Source: Study airports, FAA, and USDOT

Beginning in fall of 2016 and extending through spring of 2017, passenger surveys were made available to enplaning commercial airline passengers at the commercial airports. Surveys were made available to departing visitors when they logged on to airport Wi-Fi. Average length of stay and average spending per day, by airport, was obtained from the survey responses. This information was used in this study to estimate annual commercial visitor spending.

Information from study surveys shows that almost all visitors who come to South Carolina on a commercial airline flight spend at least one night in the state, and many stay for weeks, especially if they have traveled to the state for a trip that is leisure related. Study surveys show that leisure visitors spend more per day than business travelers, and since the average trip length is longer in the leisure visitor category, commercial airports serving coastal areas of the state have a higher average rate of spending per trip.

Estimates of total annual commercial visitor spending by airport were developed. **Table 9 – Direct Impacts from Commercial Visitor Spending** presents annual direct economic activity in this category. Once direct economic activity was estimated, the IMPLAN model was used to estimate employment that is supported, along with associated payroll. Direct economic activity, shown in **Table 9**, reflects the sum of both visitor spending and the employee payroll. Dollars infused into the South Carolina economy by visitors who arrive on a commercial airline flight supports both the spending and the payroll shown in **Table 9**.

TABLE 9 – DIRECT IMPACTS FROM COMMERCIAL VISITOR SPENDING

FAA ID	Associated City	Airport Name	Direct Employment	Direct Payroll	Direct Spending	Direct Annual Economic Activity
CHS	Charleston	Charleston International Airport	33,160	\$918,504,510	\$2,282,548,090	\$3,201,052,600
CAE	Columbia	Columbia Metropolitan Airport	3,362	\$74,818,050	\$219,893,120	\$294,711,170
FLO	Florence	Florence Regional Airport	150	\$2,693,820	\$8,879,840	\$11,573,660
GSP	Greer	Greenville-Spartanburg International (Roger Milliken Field)	5,879	\$145,287,420	\$417,546,220	\$562,833,640
HXD	Hilton Head Island	Hilton Head Airport	437	\$13,594,750	\$34,364,830	\$47,959,580
MYR	Myrtle Beach	Myrtle Beach International Airport	17,217	\$432,357,720	\$1,164,423,180	\$1,596,780,900
Commercial Airports Total			60,205	\$1,587,256,270	\$4,127,655,280	\$5,714,911,550

Source: Study Passenger Surveys and IMPLAN (Charleston Metro Chamber of Commerce)

This study estimates that visitors who arrive in South Carolina on a commercial airline flight are responsible for total annual economic activity estimated at over \$5.7 billion. Charleston International has the highest number of commercial airline visitors, estimated at over 1.1 million annually, followed by Myrtle Beach International at 735,000. Charleston, South Carolina, according to many travel magazines, is the number one tourist



destination, not just in the United States, but in the world. International visitors have higher than average spending patterns and longer lengths of stays. Average spending per visitor trip for South Carolina’s commercial airports follows:

- Charleston International Airport: \$2,006
- Columbia Metropolitan Airport: \$882
- Florence Regional Airport: \$441
- Greenville-Spartanburg International (Roger Milliken Field): \$897
- Hilton Head Airport: \$1,584
- Myrtle Beach International Airport: \$1,583

For the spending per trip per visitor reported above, all spending was assigned to one of the following categories: lodging, food, ground transportation, entertainment, or retail spending. Visitors to South Carolina have two primary reasons for travel, business and leisure. Almost all visitors to the state in both the business and leisure categories have spending for some type of lodging, food, and ground transportation (rental car, taxi, Uber, shuttle, or other). Business visitors typically have limited spending in both the entertainment and the retail categories. Business travelers make up about 40-45% of all visitors to the state. Visitors traveling for leisure have more spending in the entertainment and retail categories; leisure visitors make up about 55-60% of all visitors to the state. While many leisure visitors to South Carolina have expenditures in the entertainment category for golf, hunting, fishing and sporting events, many come to enjoy the beaches, history, architecture, and sights; these visitors have limited to no spending reported in the entertainment category.

### 3.7     Summary of Total Direct Economic Impacts for Airports in South Carolina

The preceding sections presented information on direct employment, payroll, spending, and annual economic activity (spending and payroll) for airport management, airport tenants, capital investment, general aviation visitor spending, and commercial visitor spending. In some cases, because of confidentiality, direct payroll for specific categories was not published.

**Table 10 – Summary of Total Statewide Airport Direct Economic Impact by Category** presents total direct economic impacts for employment, payroll, spending, and annual economic activity. These statewide direct impacts are summarized and represent direct impacts for airport management, airport tenants, capital investment, general aviation visitor spending, and commercial visitor spending.

TABLE 10 – SUMMARY OF TOTAL STATEWIDE AIRPORT DIRECT ECONOMIC IMPACT BY CATEGORY

Activity Center	Direct Employment	Direct Payroll	Direct Spending	Direct Economic Activity
Airport Management*	707	\$33,490,180	\$37,927,620	\$71,417,800
Airport Tenants*	5,262	\$273,065,330	\$640,231,360	\$913,296,690
– Boeing Tenant	6,943	\$963,550,130	\$1,728,052,410	\$2,691,602,540
Capital Investment	948	\$45,642,710	\$133,414,450	\$179,057,160
– Boeing Capital Investment	574	\$27,512,180	\$80,407,090	\$107,919,270
General Aviation Visitors	3,377	\$87,810,860	\$228,613,540	\$316,424,400
Commercial Visitors	60,205	\$1,587,256,270	\$4,127,655,280	\$5,714,911,550
<b>Total (Boeing EXCLUDED)</b>	<b>70,499</b>	<b>\$2,027,265,350</b>	<b>\$5,167,842,250</b>	<b>\$7,195,107,600</b>
<b>Total (Boeing INCLUDED)</b>	<b>78,016</b>	<b>\$3,018,327,660</b>	<b>\$6,976,301,750</b>	<b>\$9,994,629,410</b>

Source: Study Analysis and IMPLAN

\*Includes airport management and tenants at both commercial and general aviation airports.

Direct impacts are typically the easiest to understand because direct impacts are related to activity at each airport that can be quantified or measured in some way. **Table 11 – Summary of Total Annual Direct Impacts for South Carolina Airports** provides a summary of direct impacts by airport for employment, payroll, spending, and annual economic activity. This information is a sum of direct impacts previously presented for each airport for each of the five activity centers: airport management, airport tenants, capital investment, general aviation visitors, and, when applicable, commercial visitors. Since all impact categories are combined in **Table 10**, previously non-reported payroll that was considered confidential is reported here.

TABLE 11 – SUMMARY OF TOTAL ANNUAL DIRECT IMPACTS FOR SOUTH CAROLINA AIRPORTS

FAA ID	Associated City	Airport Name	Total Direct Employment	Total Direct Payroll	Total Direct Spending	Total Direct Annual Economic Activity
CHS	Charleston	Charleston International Airport	36,050	\$1,036,481,680	\$2,519,618,090	\$3,556,099,770
		– Boeing	7,517	\$991,062,310	\$1,808,459,500	\$2,799,521,810
		– CHS + Boeing	43,567	\$2,027,543,990	\$4,328,077,590	\$6,355,621,580
CAE	Columbia	Columbia Metropolitan Airport	4,454	\$118,725,210	\$325,317,000	\$444,042,210
FLO	Florence	Florence Regional Airport	272	\$8,146,970	\$20,309,150	\$28,456,120
GSP	Greer	Greenville-Spartanburg International (Roger Milliken Field)	7,033	\$193,920,150	\$530,592,830	\$724,512,980
HXD	Hilton Head Island	Hilton Head Airport	852	\$28,021,260	\$71,014,640	\$99,035,900
MYR	Myrtle Beach	Myrtle Beach International Airport	18,553	\$482,067,870	\$1,280,213,110	\$1,762,280,980
		<b>Commercial Airports Total (Boeing EXCLUDED)</b>	<b>67,214</b>	<b>\$1,867,363,140</b>	<b>\$4,747,064,820</b>	<b>\$6,614,427,960</b>
		<b>Commercial Airports Total (Boeing INCLUDED)</b>	<b>74,731</b>	<b>\$2,858,425,450</b>	<b>\$6,555,524,320</b>	<b>\$9,413,949,770</b>
AIK	Aiken	Aiken Regional Airport	113	\$2,926,800	\$11,178,110	\$14,104,910
AQX	Allendale	Allendale County Airport	11	\$340,790	\$782,510	\$1,123,300
AND	Anderson	Anderson Regional Airport	70	\$2,415,420	\$5,315,320	\$7,730,740
PHH	Andrews	Robert F. Swinnie Airport	4	\$136,390	\$349,000	\$485,390

TABLE 11 – SUMMARY OF TOTAL ANNUAL DIRECT IMPACTS FOR SOUTH CAROLINA AIRPORTS

FAA ID	Associated City	Airport Name	Total Direct Employment	Total Direct Payroll	Total Direct Spending	Total Direct Annual Economic Activity
99N	Bamberg	Bamberg County Airport	1	\$50,990	\$76,710	\$127,700
BNL	Barnwell	Barnwell Regional Airport	10	\$312,970	\$579,870	\$892,840
ARW	Beaufort	Beaufort County Airport	71	\$2,370,180	\$4,961,210	\$7,331,390
BBP	Bennettsville	Marlboro County Airport - HE Avent Field	5	\$169,330	\$515,350	\$684,680
52J	Bishopville	Lee County Airport-Butters Field	3	\$160,040	\$283,720	\$443,760
CDN	Camden	Woodward Field	30	\$1,344,220	\$2,866,260	\$4,210,480
JZI	Charleston	Charleston Executive Airport	299	\$9,232,180	\$23,136,870	\$32,369,050
CQW	Cheraw	Cheraw Municipal/Lynch Bellinger Field	9	\$311,350	\$796,890	\$1,108,240
DCM	Chester	Chester Catawba Regional Airport	26	\$923,220	\$1,889,190	\$2,812,410
CEU	Clemson	Oconee County Regional Airport	65	\$2,082,460	\$4,447,980	\$6,530,440
CUB	Columbia	Jim Hamilton - LB Owens Airport	73	\$2,278,470	\$6,881,290	\$9,159,760
HYW	Conway	Conway-Horry County Airport	39	\$1,699,320	\$3,469,910	\$5,169,230
UDG	Darlington	Darlington County Airport	20	\$992,900	\$1,644,790	\$2,637,690
DLC	Dillon	Dillon County Airport	1	\$26,930	\$38,320	\$65,250
GGE	Georgetown	Georgetown County Airport	108	\$3,079,270	\$8,358,650	\$11,437,920
GMU	Greenville	Greenville Downtown Airport	269	\$14,752,370	\$24,692,900	\$39,445,270
GYH	Greenville	Donaldson Field	890	\$70,338,180	\$212,697,930	\$283,036,110
GRD	Greenwood	Greenwood County Airport	30	\$1,181,540	\$3,201,150	\$4,382,690
3J0	Hampton	Hampton County Airport	13	\$792,380	\$1,106,740	\$1,899,120
HVS	Hartsville	Hartsville Regional Airport	10	\$301,090	\$924,240	\$1,225,330
CKI	Kingstree	Williamsburg Regional Airport	14	\$523,010	\$1,542,350	\$2,065,360
51J	Lake City	Lake City Municipal Airport CJ Evans Field	-	\$29,410	\$36,780	\$66,190
LKR	Lancaster	Lancaster County-McWhirter Field	21	\$734,140	\$1,942,370	\$2,676,510
LUX	Laurens	Laurens County Airport	10	\$417,020	\$854,900	\$1,271,920
5J9	Loris	Twin City Airport	2	\$40,220	\$72,710	\$112,930
MNI	Manning	Santee Cooper Regional Airport	9	\$261,240	\$899,440	\$1,160,680
MAO	Marion	Marion County Airport	15	\$886,000	\$1,336,220	\$2,222,220
S19	McCormick	McCormick County Airport	1	\$29,770	\$22,380	\$52,150
MKS	Moncks Corner	Berkeley County Airport	31	\$1,231,760	\$2,897,620	\$4,129,380
LRO	Mount Pleasant	Mt Pleasant Regional-Faison Field	51	\$1,599,780	\$3,574,470	\$5,174,250
EOE	Newberry	Newberry County Airport	22	\$923,600	\$2,461,200	\$3,384,800
CRE	North Myrtle Beach	Grand Strand Airport	268	\$7,572,370	\$18,266,090	\$25,838,460
OGB	Orangeburg	Orangeburg Municipal Airport	29	\$920,370	\$2,173,290	\$3,093,660

TABLE 11 – SUMMARY OF TOTAL ANNUAL DIRECT IMPACTS FOR SOUTH CAROLINA AIRPORTS

FAA ID	Associated City	Airport Name	Total Direct Employment	Total Direct Payroll	Total Direct Spending	Total Direct Annual Economic Activity
PYG	Pageland	Pageland Airport	4	\$118,740	\$299,330	\$418,070
6J0	Pelion	Lexington County Airport	7	\$279,280	\$837,330	\$1,116,610
LQK	Pickens	Pickens County Airport	39	\$1,244,970	\$2,746,660	\$3,991,630
3J1	Ridgeland	Ridgeland-Claude Dean Airport	30	\$1,322,810	\$3,562,810	\$4,885,620
UZA	Rock Hill	Rock Hill/York Co/Bryant Field	122	\$5,840,830	\$17,166,170	\$23,007,000
6J4	Saluda	Saluda County Airport	4	\$104,500	\$293,210	\$397,710
SPA	Spartanburg	Spartanburg Downtown Memorial Airport	170	\$7,712,910	\$16,537,960	\$24,250,870
6J2	St George	St. George Airport	2	\$56,090	\$112,860	\$168,950
DYB	Summerville	Summerville Airport	26	\$943,460	\$2,346,160	\$3,289,620
SMS	Sumter	Sumter Airport	64	\$3,315,140	\$6,621,940	\$9,937,080
6J6	Trenton	Edgefield County Airport	1	\$26,920	\$49,740	\$76,660
35A	Union	Union County, Troy Shelton Field	8	\$327,740	\$585,560	\$913,300
RBW	Walterboro	Lowcountry Regional Airport	147	\$4,520,420	\$11,237,700	\$15,758,120
FDW	Winnsboro	Fairfield County Airport	18	\$700,920	\$2,105,270	\$2,806,190
		<b>General Aviation Airports Total</b>	<b>3,285</b>	<b>\$159,902,210</b>	<b>\$420,777,430</b>	<b>\$580,679,640</b>
		<b>All Airports Total (Boeing EXCLUDED)</b>	<b>70,499</b>	<b>\$2,027,265,350</b>	<b>\$5,167,842,250</b>	<b>\$7,195,107,600</b>
		<b>All Airports Total (Boeing INCLUDED)</b>	<b>78,016</b>	<b>\$3,018,327,660</b>	<b>\$6,976,301,750</b>	<b>\$9,994,629,410</b>

Source: Study Analysis and IMPLAN

## 4.0 ESTIMATES OF INDIRECT/INDUCED ANNUAL ECONOMIC IMPACTS

### 4.1 Discussion and Measurement of Indirect/Induced Economic Impacts

Many sectors of South Carolina's economy are linked, some "directly" and others "indirectly." Preceding sections of this report discussed direct impacts for airport management, airport tenants, capital investment, and both categories of air visitor spending. This section discusses indirect/induced economic impacts for the airports in South Carolina. While some sectors of the economy considered in this analysis are linked directly, many if, not more, are linked indirectly to the airports and activities they support.

As discussed, when visitors arrive in South Carolina by air, they spend money on rental cars, hotels, food, entertainment, retail, and sometimes other items. These direct expenditures also support direct employment and payroll. As an example of how indirect/induced economic impacts are created, hotels in South Carolina are in part supported by air visitors. Hotels, that visitor spending help to support, pay for utilities, purchase linens, secure food to supply their restaurant, and buy new carpeting. In turn, the suppliers of the utilities, linens, food, and carpet also buy "inputs", make payments for salaries, and generate additional economic impacts. The indirect/induced impacts associated with the hotel's operation are examples of how direct impacts (visitor spending in this case) associated with the South Carolina airports generate additional indirect/induced impacts.

For this study, all indirect/induced impacts are based on sector specific multipliers. In the economic modeling process, direct impacts in one sector lead to additional indirect/induced impacts in other sectors of the economy. In the process to estimate indirect/induced impacts, it is important to recognize that there is not just “one” multiplier that is used to estimate how direct impacts in the employment, payroll, and spending categories continue to create additional economic impacts, once they enter the South Carolina’s economy. In reality, there are hundreds of multipliers that are considered to estimate indirect/induced impacts as reported in this study.

In this example, the hotel also paid salaries to their employees. In turn, these employees generate their own indirect/induced or multiplier impacts. For example, a hotel employee may use part of his/her income to take his/her family to dinner. Part of this expenditure becomes income to the waiter; he then spends some of his income at the dry cleaners and part of this expenditure is then used by the owners of the dry-cleaning business to buy materials to renovate their house. Indirect/induced or multiplier impacts continue in the economy being studied until the multiplier impact diminishes to zero.

Indirect/induced or multiplier impacts are not the same for all economies. In the economic modeling process, indirect/induced impacts represent or measure opportunities for businesses and individuals to purchase the goods and services they need in their local or state economy. The larger and more developed the economy of the area being studied, the greater the chance for purchasing a high percentage of what is needed in the local or state economy and the higher the multiplier effect. For small cities and rural areas, the opportunity to purchase needed goods and services locally is not as great. However, the business or individual may still be able to purchase what they need within the state, in this case South Carolina. Indirect and induced impacts typically take place in different sectors of the state’s economy. Indirect impacts are typically associated with industrial, distribution, professional services, and the utility sectors of the economy. Induced impacts are typically associated with the retail and service sectors of the economy.

For this study, each airport’s total impact (direct plus indirect/induced) on the state’s economy was estimated. For airports located in more rural areas of South Carolina, the total economic impact of the airport on the local economy is less than the airport’s total annual economic impact on the state economy. While goods and services may not be able to be purchased locally, the goods and services may still be purchased in the state, resulting in a positive economic benefit for South Carolina’s statewide economy.

All indirect/induced and total annual economic impacts discussed in this report were derived from a statewide, South Carolina-specific model. To estimate statewide economic impacts for each public airport, a series of models were prepared. The primary source of data for all models came from IMPLAN, a proprietary suite of models that has been offered for several decades by a North Carolina-based, privately-owned company. The most current version of IMPLAN, with information that is specific to South Carolina, was used in this analysis.

While there are several models that can be used to support economic impact analysis, such as that undertaken in this state study for the South Carolina airports, most are maintained by the U.S. Department of Commerce/Bureau of Economic Analysis. The data (population, employment, income, and other factors), upon which government maintained input/economic activity models are based, tends to be less current than the data in IMPLAN. Data in the IMPLAN model is more current because it is maintained by a private-sector firm.

IMPLAN is an acronym for **IM**portant analysis for **PLAN**ning; the model was developed almost 40 years ago and is approved by FAA to estimate aviation related economic impacts. IMPLAN is a general input/economic activity model that is comprised of statewide and regional specific South Carolina data sets. IMPLAN provides a system to estimate the interdependency between economic sectors, households, and government in a geographically defined region, using counties as the building blocks for the analysis. One of the most powerful aspects of IMPLAN is that the data sources behind the model are continually improved and updated. Rather than



extrapolating regional data from national averages, IMPLAN measures economic impacts from data that characterizes actual local economies in South Carolina.

IMPLAN tracks all available industry groups in every level of the state data. This permits detailed impact breakdowns and helps insure accuracy of inter-industry relationships. Some of the data sets used to support the modeling completed in this economic impact study include:

- U.S. Bureau of Labor Statistics (BLS) Covered Employment and Wages (CEW) program
- U.S. Bureau of Economic Analysis (BEA) Regional Economic Information System (REA) program
- U.S. Bureau of Economic Analysis Benchmark I/O Accounts of the United States
- BEA Economic Activity estimates
- BLS Consumer Expenditure Survey
- U.S. Census Bureau County Business Patterns (CBP) program
- U.S. Census Bureau Decennial Census and Population Surveys
- U.S. Census Bureau Economic Censuses and Surveys
- U.S. Department of Agriculture Census

An input/economic activity model estimates additional indirect/induced impacts that result from all direct impacts related to airport and airport supported employment, payroll, and spending. Indirect/induced impacts are estimated using multipliers. Multipliers vary by direct impact category, they can vary even within the same category, and they vary geographically throughout the state. There are hundreds of multipliers in the IMPLAN model that were considered in this analysis. Separate multipliers are used in the employment, payroll, and spending categories for airport management, airport tenants, capital investment, and all visitor spending. Within the tenant category, there are different multipliers for each tenant type. For the capital investment category, spending for building, asphalt, and equipment, all have different multipliers. In the visitor category, each expenditure type, lodging, food, ground transportation, entertainment, and retail, all have different multipliers. For this statewide aviation economic impact study, the focus was on direct impacts; a conservative approach was taken to estimate indirect/induced impacts.

Within categories such as visitor spending and capital spending, there are different multipliers. For instance, in the visitor spending category, there is a higher economic return to the state economy for money spent on hotels, as opposed to retail. Hotels are likely purchasing a higher percentage of the goods and services that they need to operate within the state. On the other hand, many retail items purchased by visitors to South Carolina are most likely not made in South Carolina and, often, not even in the United States. Therefore, indirect/induced impacts are higher for spending on hotels than on retail spending.

In the process to estimate indirect/induced economic impacts associated with visitor spending, separate model entries are made for hotels, food, retail, entertainment, and local transportation so that cumulative indirect/induced impacts are more accurately reflected. Direct economic activity in the capital investment category was also segmented to better reflect economic activity within the state. As another example, spending for equipment has a lower economic return than spending for runway paving.

The remaining portions of this section present indirect/induced economic impacts estimated using the IMPLAN model. Since total annual economic impacts in each category are a sum of direct and indirect/induced impacts (related to the multiplier effect), this section also presents total annual economic impacts for all airports as these impacts relate to airport management, airport tenants, capital investment, general aviation visitor spending, and commercial visitor spending.

## 4.2 Indirect/Induced and Total Economic Impacts from Airport Management at Commercial Airports

Direct economic impacts for the airport management category (employment, payroll, spending, and annual economic activity) were obtained directly from each South Carolina airport. Direct economic impacts for airport management are presented in **Table 1**. Direct impacts were entered into the IMPLAN model to estimate total economic impacts and to determine the portion of each airport's airport management related impacts that are indirect/induced (multiplier) impacts.

For the airport management category, **Table 12 – Direct, Indirect/Induced, and Total Economic Impact from Airport Management At Commercial Airports** presents each commercial airport's direct, indirect/induced, and total annual economic impacts for employment, payroll, spending, and annual economic activity. In this and other tables, annual economic activity is the sum of spending and payroll.

For all general aviation airports in South Carolina, direct impacts from airport management were combined with direct impacts from airport tenants. Many of the general aviation airports have combined management/tenant functions. Total economic impacts (direct and indirect/induced) for the airport management function at the general aviation airports follows the discussion of total tenant-related impacts.

TABLE 12 – DIRECT, INDIRECT/INDUCED, AND TOTAL ECONOMIC IMPACT FROM AIRPORT MANAGEMENT AT COMMERCIAL AIRPORTS

FAA ID	Associated City	Airport Name	Employment			Payroll			Spending			Annual Economic Activity		
			Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total
CHS	Charleston	Charleston International Airport	186	179	365	\$10,156,000	\$9,460,460	\$19,616,460	\$7,758,090	\$6,380,210	\$14,138,300	\$17,914,090	\$15,840,670	\$33,754,760
CAE	Columbia	Columbia Metropolitan Airport	65	63	128	\$3,442,000	\$3,206,270	\$6,648,270	\$4,903,900	\$4,032,940	\$8,936,840	\$8,345,900	\$7,239,210	\$15,585,110
FLO	Florence	Florence Regional Airport	14	14	28	\$697,270	\$649,510	\$1,346,780	\$1,650,890	\$1,357,680	\$3,008,570	\$2,348,160	\$2,007,190	\$4,355,350
GSP	Greer	Greenville-Spartanburg International (Roger Milliken Field)	161	155	316	\$7,594,800	\$7,074,660	\$14,669,460	\$9,500,000	\$7,812,740	\$17,312,740	\$17,094,800	\$14,887,400	\$31,982,200
HXD	Hilton Head Island	Hilton Head Airport	15	15	30	\$600,000	\$558,910	\$1,158,910	\$560,000	\$460,540	\$1,020,540	\$1,160,000	\$1,019,450	\$2,179,450
MYR	Myrtle Beach	Myrtle Beach International Airport	126	121	247	\$5,541,030	\$5,161,550	\$10,702,580	\$6,737,000	\$5,540,470	\$12,277,470	\$12,278,030	\$10,702,020	\$22,980,050
		Commercial Airports Total	567	547	1,114	\$28,031,100	\$26,111,360	\$54,142,460	\$31,109,880	\$25,584,580	\$56,694,460	\$59,140,980	\$51,695,940	\$110,836,920

Source: Airport Managers and IMPLAN (Charleston Metro Chamber of Commerce)

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### 4.3 Indirect/Induced and Total Economic Impacts from Airport Tenants at Commercial Airports

Direct economic impacts for the airport tenant category for employment, payroll, spending, and total economic activity were obtained directly from each tenant, airport representatives, or third-party data sources. Direct impacts for the airport tenant category at commercial airports are presented in **Table 2 – Direct Airport Tenant Employment and Annual Economic Activity for commercial Airports**. Direct impacts were entered into the IMPLAN model to estimate total economic impacts and to determine the portion of each airport’s tenant related impacts that are indirect/induced (multiplier) impacts.

For the airport tenant category, **Table 13 – Direct, Indirect/Induced, and Total Economic Impacts from Airport Tenants At Commercial Airports** presents each airport’s direct, indirect/induced, and total annual economic impacts for employment, payroll, spending, and annual economic activity. As with other tables in this report, annual economic impact activity is the sum of payroll and spending. It is worth re-stating that the impacts for airport tenants presented in **Table 13** are only for on-airport aviation related businesses. For all airports, tenant related impacts presented in **Table 13** are a sum of all tenant related impacts at each airport. Tenant related impacts are not reported for individual tenants in this study to protect confidential information. Indirect/induced impacts for Boeing are reported separately in this table.

### 4.4 Indirect/Induced and Total Economic Impacts for Airport Management and Airport Tenants at General Aviation Airports

There are many small general aviation airports in South Carolina that have limited economic activity in both the airport management and the airport tenant categories. In addition, many general aviation airports in the state have overlap between then management and tenant functions. As a result, to protect confidential information, the decision was made to combine the reporting of economic impacts in the airport management and the tenant functions at the general aviation airports. The combined direct impacts for the airport management and tenant categories for general aviation airports are presented in **Table 3 – Direct Airport Management And Tenant Impacts Combined For General Aviation Airports**. **Table 14 – Direct, Indirect/Induced, And Total Economic Impacts From Airport Management And Airport Tenants Combined For General Aviation Airports** presents direct, indirect/induced, and total economic impacts for general aviation airports for airport management and airport tenants. The largest single tenant at general aviation airports in South Carolina is Lockheed Martin at Donaldson Field; this tenant has an estimated 500 direct employees.

TABLE 13 – DIRECT, INDIRECT/INDUCED, AND TOTAL ECONOMIC IMPACTS FROM AIRPORT TENANTS AT COMMERCIAL AIRPORTS

FAA ID	Associated City	Airport Name	Employment			Payroll			Spending			Annual Economic Activity		
			Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total
CHS	Charleston	Charleston International Airport	1,530	1,517	3,047	\$69,173,660	\$49,314,900	\$118,488,560	\$127,904,740	\$83,694,650	\$211,599,390	\$197,078,400	\$133,009,550	\$330,087,950
		– Boeing	6,943	13,886	20,829	\$963,550,130	\$510,836,660	\$1,474,386,790	\$1,728,052,410	\$800,890,520	\$2,528,942,930	\$2,691,602,540	\$1,311,727,180	\$4,003,329,720
		– CHS + Boeing	8,473	15,403	23,876	\$1,032,723,790	\$560,151,560	\$1,592,875,350	\$1,855,957,150	\$884,585,170	\$2,740,542,320	\$2,888,680,940	\$1,444,736,730	\$4,333,417,670
CAE	Columbia	Columbia Metropolitan Airport	737	882	1,619	\$32,770,040	\$28,725,660	\$61,495,700	\$77,986,520	\$50,017,990	\$128,004,510	\$110,756,560	\$78,743,650	\$189,500,210
FLO	Florence	Florence Regional Airport	68	64	132	\$3,661,400	\$1,995,680	\$5,657,080	\$6,271,930	\$3,654,280	\$9,926,210	\$9,933,330	\$5,649,960	\$15,583,290
GSP	Greer	Greenville-Spartanburg International (Roger Milliken Field)	720	787	1,507	\$30,710,570	\$28,327,850	\$59,038,420	\$74,422,140	\$43,280,120	\$117,702,260	\$105,132,710	\$71,607,970	\$176,740,680
HXD	Hilton Head Island	Hilton Head Airport	85	92	177	\$3,750,690	\$2,196,170	\$5,946,860	\$9,733,710	\$7,024,800	\$16,758,510	\$13,484,400	\$9,220,970	\$22,705,370
MYR	Myrtle Beach	Myrtle Beach International Airport	633	604	1,237	\$26,371,400	\$24,792,210	\$51,163,610	\$58,634,510	\$35,386,610	\$94,021,120	\$85,005,910	\$60,178,820	\$145,184,730
		Commercial Airports Total (Boeing EXCLUDED)	3,773	3,946	7,719	\$166,437,760	\$135,352,470	\$301,790,230	\$354,953,550	\$223,058,450	\$578,012,000	\$521,391,310	\$358,410,920	\$879,802,230
		Commercial Airports Total (Boeing INCLUDED)	10,716	17,832	28,548	\$1,129,987,890	\$646,189,130	\$1,776,177,020	\$2,083,005,960	\$1,023,948,970	\$3,106,954,930	\$3,212,993,850	\$1,670,138,100	\$4,883,131,950

Source: Airport Managers, Airport Tenants, and IMPLAN (Charleston Metro Chamber of Commerce)



TABLE 14 – DIRECT, INDIRECT/INDUCED, AND TOTAL ECONOMIC IMPACTS FROM AIRPORT MANAGEMENT AND AIRPORT TENANTS COMBINED FOR GENERAL AVIATION AIRPORTS

FAA ID	Associated City	Airport Name	Employment			Payroll			Spending			Annual Economic Activity		
			Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total
AIK	Aiken	Aiken Regional Airport	30	41	71	\$1,434,100	\$1,379,000	\$2,813,100	\$6,332,340	\$5,380,540	\$11,712,880	\$7,766,440	\$6,759,540	\$14,525,980
AQX	Allendale	Allendale County Airport	5	2	7	\$190,230	\$106,390	\$296,620	\$382,520	\$190,960	\$573,480	\$572,750	\$297,350	\$870,100
AND	Anderson	Anderson Regional Airport	24	18	42	\$1,055,230	\$614,600	\$1,669,830	\$1,585,510	\$1,272,040	\$2,857,550	\$2,640,740	\$1,886,640	\$4,527,380
PHH	Andrews	Robert F. Swinnie Airport	2	1	3	\$75,540	\$69,910	\$145,450	\$172,870	\$153,480	\$326,350	\$248,410	\$223,390	\$471,800
99N	Bamberg	Bamberg County Airport	<1	-	1	\$27,500	\$25,620	\$53,120	\$10,000	\$8,220	\$18,220	\$37,500	\$33,840	\$71,340
BNL	Barnwell	Barnwell Regional Airport	3	3	6	\$120,000	\$111,780	\$231,780	\$49,880	\$41,020	\$90,900	\$169,880	\$152,800	\$322,680
ARW	Beaufort	Beaufort County Airport	13	16	29	\$679,690	\$626,030	\$1,305,720	\$771,570	\$614,990	\$1,386,560	\$1,451,260	\$1,241,020	\$2,692,280
BBP	Bennettsville	Marlboro County Airport - HE Avent Field	2	2	4	\$56,750	\$51,400	\$108,150	\$196,600	\$176,840	\$373,440	\$253,350	\$228,240	\$481,590
52J	Bishopville	Lee County Airport-Butters Field	2	1	3	\$79,000	\$49,150	\$128,150	\$47,170	\$46,800	\$93,970	\$126,170	\$95,950	\$222,120
CDN	Camden	Woodward Field	17	25	42	\$914,040	\$935,980	\$1,850,020	\$1,616,080	\$1,086,690	\$2,702,770	\$2,530,120	\$2,022,670	\$4,552,790
JZI	Charleston	Charleston Executive Airport	33	32	65	\$1,542,700	\$1,047,730	\$2,590,430	\$3,926,360	\$3,161,850	\$7,088,210	\$5,469,060	\$4,209,580	\$9,678,640
CQW	Cheraw	Cheraw Municipal/Lynch Bellinger Field	4	2	6	\$129,000	\$115,820	\$244,820	\$279,190	\$269,340	\$548,530	\$408,190	\$385,160	\$793,350
DCM	Chester	Chester Catawba Regional Airport	19	20	39	\$714,000	\$640,640	\$1,354,640	\$1,310,390	\$1,214,320	\$2,524,710	\$2,024,390	\$1,854,960	\$3,879,350
CEU	Clemson	Oconee County Regional Airport	15	10	25	\$736,450	\$407,970	\$1,144,420	\$807,630	\$643,910	\$1,451,540	\$1,544,080	\$1,051,880	\$2,595,960
CUB	Columbia	Jim Hamilton - LB Owens Airport	23	24	47	\$940,540	\$947,220	\$1,887,760	\$3,038,520	\$2,625,530	\$5,664,050	\$3,979,060	\$3,572,750	\$7,551,810
HYW	Conway	Conway-Horry County Airport	20	25	45	\$1,138,190	\$1,215,240	\$2,353,430	\$2,014,760	\$1,345,330	\$3,360,090	\$3,152,950	\$2,560,570	\$5,713,520
UDG	Darlington	Darlington County Airport	8	9	17	\$710,000	\$361,060	\$1,071,060	\$736,590	\$768,950	\$1,505,540	\$1,446,590	\$1,130,010	\$2,576,600
DLC	Dillon	Dillon County Airport	<1	-	1	\$20,000	\$18,630	\$38,630	\$20,000	\$16,450	\$36,450	\$40,000	\$35,080	\$75,080
GGE	Georgetown	Georgetown County Airport	11	13	24	\$480,000	\$509,640	\$989,640	\$1,513,800	\$1,278,150	\$2,791,950	\$1,993,800	\$1,787,790	\$3,781,590
GMU	Greenville	Greenville Downtown Airport	181	245	426	\$12,402,200	\$8,843,070	\$21,245,270	\$18,294,880	\$14,745,450	\$33,040,330	\$30,697,080	\$23,588,520	\$54,285,600
GYH	Greenville	Donaldson Field	841	960	1,801	\$68,673,380	\$57,960,160	\$126,633,540	\$208,098,640	\$177,329,420	\$385,428,060	\$276,772,020	\$235,289,580	\$512,061,600
GRD	Greenwood	Greenwood County Airport	12	16	28	\$632,000	\$615,560	\$1,247,560	\$1,680,690	\$1,360,880	\$3,041,570	\$2,312,690	\$1,976,440	\$4,289,130
3J0	Hampton	Hampton County Airport	13	16	29	\$770,000	\$727,380	\$1,497,380	\$1,042,810	\$708,030	\$1,750,840	\$1,812,810	\$1,435,410	\$3,248,220
HVS	Hartsville	Hartsville Regional Airport	2	4	6	\$102,720	\$104,360	\$207,080	\$287,200	\$243,230	\$530,430	\$389,920	\$347,590	\$737,510
CKI	Kingstree	Williamsburg Regional Airport	8	1	9	\$306,600	\$101,490	\$408,090	\$920,380	\$435,490	\$1,355,870	\$1,226,980	\$536,980	\$1,763,960
51J	Lake City	Lake City Municipal Airport CJ Evans Field	-	1	1	\$18,820	\$17,530	\$36,350	\$7,700	\$6,330	\$14,030	\$26,520	\$23,860	\$50,380
LKR	Lancaster	Lancaster County-McWhirter Field	3	4	7	\$134,500	\$123,120	\$257,620	\$258,340	\$231,890	\$490,230	\$392,840	\$355,010	\$747,850
LUX	Laurens	Laurens County Airport	4	4	8	\$144,250	\$130,040	\$274,290	\$93,950	\$92,720	\$186,670	\$238,200	\$222,760	\$460,960
5J9	Loris	Twin City Airport	<1	-	1	\$20,000	\$18,630	\$38,630	\$18,770	\$15,440	\$34,210	\$38,770	\$34,070	\$72,840
MNI	Manning	Santee Cooper Regional Airport	5	5	10	\$146,750	\$131,650	\$278,400	\$580,100	\$529,370	\$1,109,470	\$726,850	\$661,020	\$1,387,870
MAO	Marion	Marion County Airport	13	17	30	\$803,600	\$767,470	\$1,571,070	\$1,103,030	\$742,660	\$1,845,690	\$1,906,630	\$1,510,130	\$3,416,760
S19	McCormick	McCormick County Airport	<1	-	1	\$25,090	\$23,380	\$48,470	\$10,000	\$8,220	\$18,220	\$35,090	\$31,600	\$66,690
MKS	Moncks Corner	Berkeley County Airport	8	8	16	\$355,050	\$359,160	\$714,210	\$546,630	\$386,610	\$933,240	\$901,680	\$745,770	\$1,647,450
LRO	Mount Pleasant	Mt Pleasant Regional-Faison Field	11	10	21	\$385,000	\$311,440	\$696,440	\$480,260	\$440,710	\$920,970	\$865,260	\$752,150	\$1,617,410
EOE	Newberry	Newberry County Airport	3	3	6	\$121,250	\$74,970	\$196,220	\$122,580	\$99,480	\$222,060	\$243,830	\$174,450	\$418,280

TABLE 14 – DIRECT, INDIRECT/INDUCED, AND TOTAL ECONOMIC IMPACTS FROM AIRPORT MANAGEMENT AND AIRPORT TENANTS COMBINED FOR GENERAL AVIATION AIRPORTS

FAA ID	Associated City	Airport Name	Employment			Payroll			Spending			Annual Economic Activity		
			Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total
CRE	North Myrtle Beach	Grand Strand Airport	31	34	65	\$1,411,050	\$1,261,650	\$2,672,700	\$2,208,620	\$1,581,520	\$3,790,140	\$3,619,670	\$2,843,170	\$6,462,840
OGB	Orangeburg	Orangeburg Municipal Airport	6	7	13	\$310,000	\$281,600	\$591,600	\$520,860	\$492,600	\$1,013,460	\$830,860	\$774,200	\$1,605,060
PYG	Pageland	Pageland Airport	<1	-	1	\$20,000	\$18,630	\$38,630	\$15,000	\$12,340	\$27,340	\$35,000	\$30,970	\$65,970
6J0	Pelion	Lexington County Airport	1	-	1	\$20,000	\$18,630	\$38,630	\$72,590	\$59,700	\$132,290	\$92,590	\$78,330	\$170,920
LQK	Pickens	Pickens County Airport	11	11	22	\$443,700	\$378,260	\$821,960	\$552,080	\$414,690	\$966,770	\$995,780	\$792,950	\$1,788,730
3J1	Ridgeland	Ridgeland-Claude Dean Airport	9	10	19	\$353,950	\$252,490	\$606,440	\$753,880	\$751,320	\$1,505,200	\$1,107,830	\$1,003,810	\$2,111,640
UZA	Rock Hill	Rock Hill/York Co/Bryant Field	62	80	142	\$4,152,000	\$3,143,730	\$7,295,730	\$12,540,300	\$10,215,670	\$22,755,970	\$16,692,300	\$13,359,400	\$30,051,700
6J4	Saluda	Saluda County Airport	2	1	3	\$40,000	\$37,430	\$77,430	\$103,950	\$12,190	\$116,140	\$143,950	\$49,620	\$193,570
SPA	Spartanburg	Spartanburg Downtown Memorial Airport	84	115	199	\$4,568,130	\$2,972,490	\$7,540,620	\$8,012,840	\$6,963,410	\$14,976,250	\$12,580,970	\$9,935,900	\$22,516,870
6J2	St George	St. George Airport	1	-	1	\$20,390	\$19,000	\$39,390	\$17,430	\$14,340	\$31,770	\$37,820	\$33,340	\$71,160
DYB	Summerville	Summerville Airport	8	9	17	\$303,900	\$298,290	\$602,190	\$670,300	\$497,890	\$1,168,190	\$974,200	\$796,180	\$1,770,380
SMS	Sumter	Sumter Airport	29	40	69	\$2,210,600	\$1,667,940	\$3,878,540	\$3,538,640	\$2,759,500	\$6,298,140	\$5,749,240	\$4,427,440	\$10,176,680
6J6	Trenton	Edgefield County Airport	<1	-	1	\$20,000	\$18,630	\$38,630	\$27,380	\$23,950	\$51,330	\$47,380	\$42,580	\$89,960
35A	Union	Union County, Troy Shelton Field	6	6	12	\$246,250	\$194,670	\$440,920	\$367,610	\$306,230	\$673,840	\$613,860	\$500,900	\$1,114,760
RBW	Walterboro	Lowcountry Regional Airport	29	38	67	\$1,519,260	\$1,377,560	\$2,896,820	\$3,218,740	\$1,926,210	\$5,144,950	\$4,738,000	\$3,303,770	\$8,041,770
FDW	Winnsboro	Fairfield County Airport	9	10	19	\$363,250	\$360,110	\$723,360	\$1,117,590	\$995,380	\$2,112,970	\$1,480,840	\$1,355,490	\$2,836,330
General Aviation Airports Total			1,623	1,899	3,528	\$112,086,650	\$91,844,330	\$203,930,980	\$292,095,550	\$244,698,280	\$536,793,830	\$404,182,200	\$336,542,610	\$740,724,810

Source: Airport Managers, Airport Tenants, and IMPLAN (Charleston Metro Chamber of Commerce)

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## 4.5 Airport Indirect/Induced and Total Economic Impacts from Airport Capital Investment

Direct economic impacts for the capital investment category for employment, payroll, spending, and annual economic activity were obtained directly from SCAC, the FAA, airport sponsors, or third party private investment sources. Direct impacts for the capital investment category are presented in **Table 4 – Direct Impacts from Average Annual Capital Investment**. Direct impacts were entered into the IMPLAN model to estimate total economic impacts and to determine the portion of annual economic impacts from capital investment that is related to indirect/induced (multiplier) impacts.

For the capital investment category, **Table 15 – Direct, Indirect/Induced, and Total Economic Impacts from Average Annual Capital Investment** presents each airport’s direct, indirect/induced, and total annual economic impacts for employment, payroll, spending, and annual economic activity. These results consider what has been invested in each airport, on average, over the past several years. For this impact category, a multi-year historic period for capital investment was considered. This approach was taken so that smaller airports that complete major projects on a less frequent basis would not be at a disadvantage. Also, considering capital investment over a multi-year period helps to capture the full impact for major projects, such as the new commercial passenger terminals at Charleston International and Greenville-Spartanburg International airports, which took multiple years to complete.

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TABLE 15 – DIRECT, INDIRECT/INDUCED, AND TOTAL ECONOMIC IMPACTS FROM AVERAGE ANNUAL CAPITAL INVESTMENT

FAA ID	Associated City	Airport Name	Employment			Payroll			Spending			Annual Economic Activity		
			Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total
CHS	Charleston	Charleston International Airport	280	186	466	\$13,989,190	\$8,103,840	\$22,093,030	\$40,116,020	\$26,168,820	\$66,284,840	\$54,105,210	\$34,272,660	\$88,377,870
		– Boeing	574	370	944	\$27,512,180	\$16,120,650	\$43,632,830	\$80,407,090	\$51,748,490	\$132,155,580	\$107,919,270	\$67,869,140	\$175,788,410
		– CHS + Boeing	854	556	1,410	\$41,501,370	\$24,224,490	\$65,725,860	\$120,523,110	\$77,917,310	\$198,440,420	\$162,024,480	\$102,141,800	\$264,166,280
CAE	Columbia	Columbia Metropolitan Airport	56	35	91	\$2,589,600	\$1,530,300	\$4,119,900	\$7,675,160	\$4,939,590	\$12,614,750	\$10,264,760	\$6,469,890	\$16,734,650
FLO	Florence	Florence Regional Airport	17	10	27	\$683,490	\$425,450	\$1,108,940	\$2,203,730	\$1,371,870	\$3,575,600	\$2,887,220	\$1,797,320	\$4,684,540
GSP	Greer	Greenville-Spartanburg International (Roger Milliken Field)	135	91	226	\$6,874,550	\$3,968,160	\$10,842,710	\$19,595,720	\$12,814,810	\$32,410,530	\$26,470,270	\$16,782,970	\$43,253,240
HXD	Hilton Head Island	Hilton Head Airport	36	24	60	\$1,737,480	\$1,017,800	\$2,755,280	\$5,075,880	\$3,285,930	\$8,361,810	\$6,813,360	\$4,303,730	\$11,117,090
MYR	Myrtle Beach	Myrtle Beach International Airport	177	107	284	\$7,794,380	\$4,671,870	\$12,466,250	\$23,646,390	\$15,075,940	\$38,722,330	\$31,440,770	\$19,747,810	\$51,188,580
		<b>Commercial Airports Total (Boeing EXCLUDED)</b>	<b>701</b>	<b>453</b>	<b>1,154</b>	<b>\$33,668,690</b>	<b>\$19,717,420</b>	<b>\$53,386,110</b>	<b>\$98,312,900</b>	<b>\$63,656,960</b>	<b>\$161,969,860</b>	<b>\$131,981,590</b>	<b>\$83,374,380</b>	<b>\$215,355,970</b>
		<b>Commercial Airports Total (Boeing INCLUDED)</b>	<b>1,275</b>	<b>823</b>	<b>2,098</b>	<b>\$61,180,870</b>	<b>\$35,838,070</b>	<b>\$97,018,940</b>	<b>\$178,719,990</b>	<b>\$115,405,450</b>	<b>\$294,125,440</b>	<b>\$239,900,860</b>	<b>\$151,243,520</b>	<b>\$391,144,380</b>
AIK	Aiken	Aiken Regional Airport	4	3	7	\$200,970	\$117,750	\$318,720	\$587,290	\$380,140	\$967,430	\$788,260	\$497,890	\$1,286,150
AQX	Allendale	Allendale County Airport	-	-	-	\$6,670	\$3,940	\$10,610	\$19,790	\$12,730	\$32,520	\$26,460	\$16,670	\$43,130
AND	Anderson	Anderson Regional Airport	9	6	15	\$453,480	\$259,780	\$713,260	\$1,276,380	\$839,090	\$2,115,470	\$1,729,860	\$1,098,870	\$2,828,730
PHH	Andrews	Robert F. Swinnie Airport	1	1	2	\$42,170	\$25,280	\$67,450	\$127,950	\$81,570	\$209,520	\$170,120	\$106,850	\$276,970
99N	Bamberg	Bamberg County Airport	-	-	-	\$14,210	\$8,400	\$22,610	\$42,180	\$27,120	\$69,300	\$56,390	\$35,520	\$91,910
BNL	Barnwell	Barnwell Regional Airport	1	1	2	\$55,050	\$32,570	\$87,620	\$163,440	\$105,110	\$268,550	\$218,490	\$137,680	\$356,170
ARW	Beaufort	Beaufort County Airport	2	1	3	\$85,960	\$50,350	\$136,310	\$251,110	\$162,560	\$413,670	\$337,070	\$212,910	\$549,980
BBP	Bennettsville	Marlboro County Airport - HE Avent Field	1	1	2	\$62,850	\$37,180	\$100,030	\$186,590	\$120,010	\$306,600	\$249,440	\$157,190	\$406,630
52J	Bishopville	Lee County Airport-Butters Field	1	1	2	\$68,730	\$40,650	\$109,380	\$204,030	\$131,220	\$335,250	\$272,760	\$171,870	\$444,630
CDN	Camden	Woodward Field	6	3	9	\$270,800	\$160,030	\$430,830	\$802,620	\$516,550	\$1,319,170	\$1,073,420	\$676,580	\$1,750,000
JZI	Charleston	Charleston Executive Airport	10	7	17	\$516,720	\$299,330	\$816,050	\$1,481,770	\$966,600	\$2,448,370	\$1,998,490	\$1,265,930	\$3,264,420
CQW	Cheraw	Cheraw Municipal/Lynch Bellinger Field	2	2	4	\$110,010	\$65,070	\$175,080	\$326,570	\$210,040	\$536,610	\$436,580	\$275,110	\$711,690
DCM	Chester	Chester Catawba Regional Airport	2	1	3	\$79,630	\$47,100	\$126,730	\$236,390	\$152,040	\$388,430	\$316,020	\$199,140	\$515,160
CEU	Clemson	Oconee County Regional Airport	4	3	7	\$203,020	\$120,100	\$323,120	\$602,720	\$387,650	\$990,370	\$805,740	\$507,750	\$1,313,490
CUB	Columbia	Jim Hamilton - LB Owens Airport	9	6	15	\$440,940	\$260,570	\$701,510	\$1,306,880	\$841,080	\$2,147,960	\$1,747,820	\$1,101,650	\$2,849,470
HYW	Conway	Conway-Horry County Airport	2	1	3	\$81,540	\$48,880	\$130,420	\$247,380	\$157,710	\$405,090	\$328,920	\$206,590	\$535,510
UDG	Darlington	Darlington County Airport	3	2	5	\$121,360	\$75,550	\$196,910	\$391,300	\$243,590	\$634,890	\$512,660	\$319,140	\$831,800
DLC	Dillon	Dillon County Airport	-	-	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GGE	Georgetown	Georgetown County Airport	7	4	11	\$296,880	\$177,940	\$474,820	\$900,660	\$574,220	\$1,474,880	\$1,197,540	\$752,160	\$1,949,700
GMU	Greenville	Greenville Downtown Airport	7	5	12	\$356,480	\$204,220	\$560,700	\$1,003,370	\$659,610	\$1,662,980	\$1,359,850	\$863,830	\$2,223,680
GYH	Greenville	Donaldson Field	17	11	28	\$869,540	\$498,130	\$1,367,670	\$2,447,440	\$1,608,950	\$4,056,390	\$3,316,980	\$2,107,080	\$5,424,060
GRD	Greenwood	Greenwood County Airport	4	3	7	\$192,870	\$114,090	\$306,960	\$572,570	\$368,260	\$940,830	\$765,440	\$482,350	\$1,247,790
3J0	Hampton	Hampton County Airport	-	1	1	\$14,740	\$8,710	\$23,450	\$43,750	\$28,140	\$71,890	\$58,490	\$36,850	\$95,340
HVS	Hartsville	Hartsville Regional Airport	2	2	4	\$93,280	\$58,070	\$151,350	\$300,770	\$187,240	\$488,010	\$394,050	\$245,310	\$639,360
CKI	Kingstree	Williamsburg Regional Airport	3	2	5	\$150,530	\$89,040	\$239,570	\$446,880	\$287,410	\$734,290	\$597,410	\$376,450	\$973,860



TABLE 15 – DIRECT, INDIRECT/INDUCED, AND TOTAL ECONOMIC IMPACTS FROM AVERAGE ANNUAL CAPITAL INVESTMENT

FAA ID	Associated City	Airport Name	Employment			Payroll			Spending			Annual Economic Activity		
			Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total
51J	Lake City	Lake City Municipal Airport CJ Evans Field	-	-	-	\$3,370	\$1,990	\$5,360	\$10,000	\$6,430	\$16,430	\$13,370	\$8,420	\$21,790
LKR	Lancaster	Lancaster County-McWhirter Field	6	4	10	\$290,620	\$171,910	\$462,530	\$862,770	\$554,890	\$1,417,660	\$1,153,390	\$726,800	\$1,880,190
LUX	Laurens	Laurens County Airport	4	3	7	\$217,750	\$124,740	\$342,490	\$612,880	\$402,910	\$1,015,790	\$830,630	\$527,650	\$1,358,280
5J9	Loris	Twin City Airport	-	-	-	\$3,970	\$2,370	\$6,340	\$12,030	\$7,680	\$19,710	\$16,000	\$10,050	\$26,050
MNI	Manning	Santee Cooper Regional Airport	1	1	2	\$51,600	\$30,520	\$82,120	\$153,180	\$98,530	\$251,710	\$204,780	\$129,050	\$333,830
MAO	Marion	Marion County Airport	1	1	2	\$47,430	\$28,050	\$75,480	\$140,790	\$90,560	\$231,350	\$188,220	\$118,610	\$306,830
S19	McCormick	McCormick County Airport	-	-	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
MKS	Moncks Corner	Berkeley County Airport	9	7	16	\$467,970	\$271,090	\$739,060	\$1,341,970	\$875,410	\$2,217,380	\$1,809,940	\$1,146,500	\$2,956,440
LRO	Mount Pleasant	Mt Pleasant Regional-Faison Field	5	3	8	\$231,540	\$134,120	\$365,660	\$663,960	\$433,120	\$1,097,080	\$895,500	\$567,240	\$1,462,740
EOE	Newberry	Newberry County Airport	14	9	23	\$669,570	\$396,080	\$1,065,650	\$1,987,770	\$1,278,440	\$3,266,210	\$2,657,340	\$1,674,520	\$4,331,860
CRE	North Myrtle Beach	Grand Strand Airport	8	4	12	\$333,030	\$199,610	\$532,640	\$1,010,330	\$644,140	\$1,654,470	\$1,343,360	\$843,750	\$2,187,110
OGB	Orangeburg	Orangeburg Municipal Airport	2	1	3	\$97,360	\$57,600	\$154,960	\$289,050	\$185,900	\$474,950	\$386,410	\$243,500	\$629,910
PYG	Pageland	Pageland Airport	2	1	3	\$71,750	\$42,440	\$114,190	\$213,010	\$136,990	\$350,000	\$284,760	\$179,430	\$464,190
6J0	Pelion	Lexington County Airport	5	3	8	\$232,040	\$137,130	\$369,170	\$687,740	\$442,610	\$1,130,350	\$919,780	\$579,740	\$1,499,520
LQK	Pickens	Pickens County Airport	5	3	8	\$243,120	\$139,280	\$382,400	\$684,300	\$449,870	\$1,134,170	\$927,420	\$589,150	\$1,516,570
3J1	Ridgeland	Ridgeland-Claude Dean Airport	19	13	32	\$916,700	\$537,000	\$1,453,700	\$2,678,060	\$1,733,670	\$4,411,730	\$3,594,760	\$2,270,670	\$5,865,430
UZA	Rock Hill	Rock Hill/York Co/Bryant Field	10	5	15	\$442,310	\$261,640	\$703,950	\$1,313,090	\$844,510	\$2,157,600	\$1,755,400	\$1,106,150	\$2,861,550
6J4	Saluda	Saluda County Airport	1	1	2	\$52,310	\$30,910	\$83,220	\$155,040	\$99,780	\$254,820	\$207,350	\$130,690	\$338,040
SPA	Spartanburg	Spartanburg Downtown Memorial Airport	34	23	57	\$1,644,130	\$971,690	\$2,615,820	\$4,873,170	\$3,136,380	\$8,009,550	\$6,517,300	\$4,108,070	\$10,625,370
6J2	St George	St. George Airport	-	1	1	\$19,040	\$11,040	\$30,080	\$54,610	\$35,620	\$90,230	\$73,650	\$46,660	\$120,310
DYB	Summerville	Summerville Airport	5	3	8	\$243,200	\$140,880	\$384,080	\$697,400	\$454,930	\$1,152,330	\$940,600	\$595,810	\$1,536,410
SMS	Sumter	Sumter Airport	10	7	17	\$475,230	\$281,120	\$756,350	\$1,410,830	\$907,380	\$2,318,210	\$1,886,060	\$1,188,500	\$3,074,560
6J6	Trenton	Edgefield County Airport	-	-	-	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
35A	Union	Union County, Troy Shelton Field	1	-	1	\$39,840	\$23,550	\$63,390	\$118,090	\$76,010	\$194,100	\$157,930	\$99,560	\$257,490
RBW	Walterboro	Lowcountry Regional Airport	3	2	5	\$138,270	\$81,790	\$220,060	\$410,490	\$264,010	\$674,500	\$548,760	\$345,800	\$894,560
FDW	Winnsboro	Fairfield County Airport	5	4	9	\$253,440	\$149,770	\$403,210	\$751,160	\$483,430	\$1,234,590	\$1,004,600	\$633,200	\$1,637,800
		<b>General Aviation Airports Total</b>	247	166	413	\$11,974,020	\$7,029,050	\$19,003,070	\$35,101,550	\$22,691,840	\$57,793,390	\$47,075,570	\$29,720,890	\$76,796,460
		<b>All Airports Total (Boeing EXCLUDED)</b>	<b>948</b>	<b>619</b>	<b>1,567</b>	<b>\$45,642,710</b>	<b>\$26,746,470</b>	<b>\$72,389,180</b>	<b>\$133,414,450</b>	<b>\$86,348,800</b>	<b>\$219,763,250</b>	<b>\$179,057,160</b>	<b>\$113,095,270</b>	<b>\$292,152,430</b>
		<b>All Airports Total (Boeing INCLUDED)</b>	<b>1,522</b>	<b>989</b>	<b>2,511</b>	<b>\$73,154,890</b>	<b>\$42,867,120</b>	<b>\$116,022,010</b>	<b>\$213,821,540</b>	<b>\$138,097,290</b>	<b>\$351,918,830</b>	<b>\$286,976,430</b>	<b>\$180,964,410</b>	<b>\$467,940,840</b>

Source: South Carolina Aeronautics Commission, FAA, Airport Managers, Airport Tenants, and IMPLAN (Charleston Metro Chamber of Commerce)

## 4.6 Indirect/Induced and Total Economic Impacts from General Aviation Visitors

Direct economic impacts for the general aviation visitor spending category for employment, payroll, spending, and annual economic activity were obtained using input from airport operators, SCAC, FAA NOP data, and study surveys. Direct impacts for general aviation visitors are presented in **Table 7 – General Aviation Visitor Direct Employment, Payroll, Spending, and Annual Economic Activity**.

Direct impacts were entered into the IMPLAN model to estimate total economic impacts and to determine the portion of general aviation visitor related economic impacts that is related to indirect/induced (multiplier) impacts. For both general aviation and commercial visitor spending, direct visitor spending was assigned to one or more of the following categories based on survey results: hotels, food, ground transportation, retail, and entertainment.

For the general aviation visitor spending category, **Table 16 – Direct, Indirect/Induced, and Total Economic Impacts from General Aviation Visitor Spending** presents each airport's direct, indirect/induced, and total annual economic impacts for employment, payroll, spending, and total annual economic activity, which is the sum of payroll and spending.

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TABLE 16 – DIRECT, INDIRECT/INDUCED, AND TOTAL ECONOMIC IMPACTS FROM GENERAL AVIATION VISITOR SPENDING

FAA ID	Associated City	Airport Name	Employment			Payroll			Spending			Annual Economic Activity		
			Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total
CHS	Charleston	Charleston International Airport	894	329	1,223	\$24,658,320	\$13,552,930	\$38,211,250	\$61,291,150	\$44,010,980	\$105,302,130	\$85,949,470	\$57,563,910	\$143,513,380
CAE	Columbia	Columbia Metropolitan Airport	234	75	309	\$5,105,520	\$3,113,040	\$8,218,560	\$14,858,300	\$10,010,480	\$24,868,780	\$19,963,820	\$13,123,520	\$33,087,340
FLO	Florence	Florence Regional Airport	23	7	30	\$410,990	\$264,840	\$675,830	\$1,302,760	\$850,990	\$2,153,750	\$1,713,750	\$1,115,830	\$2,829,580
GSP	Greer	Greenville-Spartanburg International (Roger Milliken Field)	138	49	187	\$3,452,810	\$2,030,650	\$5,483,460	\$9,528,750	\$6,544,810	\$16,073,560	\$12,981,560	\$8,575,460	\$21,557,020
HXD	Hilton Head Island	Hilton Head Airport	279	114	393	\$8,338,340	\$4,682,500	\$13,020,840	\$21,280,220	\$15,167,910	\$36,448,130	\$29,618,560	\$19,850,410	\$49,468,970
MYR	Myrtle Beach	Myrtle Beach International Airport	400	139	539	\$10,003,340	\$5,738,920	\$15,742,260	\$26,772,030	\$18,652,020	\$45,424,050	\$36,775,370	\$24,390,940	\$61,166,310
Commercial Airports Total			1,968	713	2,681	\$51,969,320	\$29,382,880	\$81,352,200	\$135,033,210	\$95,237,190	\$230,270,400	\$187,002,530	\$124,620,070	\$311,622,600
AIK	Aiken	Aiken Regional Airport	79	21	100	\$1,291,730	\$862,480	\$2,154,210	\$4,258,480	\$2,760,850	\$7,019,330	\$5,550,210	\$3,623,330	\$9,173,540
AQX	Allendale	Allendale County Airport	6	2	8	\$143,890	\$82,880	\$226,770	\$380,200	\$266,600	\$646,800	\$524,090	\$349,480	\$873,570
AND	Anderson	Anderson Regional Airport	37	13	50	\$906,710	\$534,630	\$1,441,340	\$2,453,430	\$1,716,230	\$4,169,660	\$3,360,140	\$2,250,860	\$5,611,000
PHH	Andrews	Robert F. Swinnie Airport	1	-	1	\$18,680	\$10,600	\$29,280	\$48,180	\$34,120	\$82,300	\$66,860	\$44,720	\$111,580
99N	Bamberg	Bamberg County Airport	-	1	1	\$9,280	\$5,350	\$14,630	\$24,530	\$17,200	\$41,730	\$33,810	\$22,550	\$56,360
BNL	Barnwell	Barnwell Regional Airport	6	1	7	\$137,920	\$80,440	\$218,360	\$366,550	\$258,300	\$624,850	\$504,470	\$338,740	\$843,210
ARW	Beaufort	Beaufort County Airport	56	22	78	\$1,604,530	\$882,360	\$2,486,890	\$3,938,530	\$2,857,100	\$6,795,630	\$5,543,060	\$3,739,460	\$9,282,520
BBP	Bennettsville	Marlboro County Airport - HE Avent Field	2	1	3	\$49,730	\$29,000	\$78,730	\$132,160	\$93,120	\$225,280	\$181,890	\$122,120	\$304,010
52J	Bishopville	Lee County Airport-Butters Field	-	1	1	\$12,310	\$7,090	\$19,400	\$32,520	\$22,810	\$55,330	\$44,830	\$29,900	\$74,730
CDN	Camden	Woodward Field	7	3	10	\$159,380	\$95,240	\$254,620	\$447,560	\$306,110	\$753,670	\$606,940	\$401,350	\$1,008,290
JZI	Charleston	Charleston Executive Airport	256	96	352	\$7,172,760	\$3,960,190	\$11,132,950	\$17,728,740	\$12,822,200	\$30,550,940	\$24,901,500	\$16,782,390	\$41,683,890
CQW	Cheraw	Cheraw Municipal/Lynch Bellinger Field	3	1	4	\$72,340	\$41,660	\$114,000	\$191,130	\$134,020	\$325,150	\$263,470	\$175,680	\$439,150
DCM	Chester	Chester Catawba Regional Airport	5	2	7	\$129,590	\$74,640	\$204,230	\$342,410	\$240,110	\$582,520	\$472,000	\$314,750	\$786,750
CEU	Clemson	Oconee County Regional Airport	46	16	62	\$1,142,990	\$666,630	\$1,809,620	\$3,037,630	\$2,140,580	\$5,178,210	\$4,180,620	\$2,807,210	\$6,987,830
CUB	Columbia	Jim Hamilton - LB Owens Airport	41	13	54	\$896,990	\$543,240	\$1,440,230	\$2,535,890	\$1,742,810	\$4,278,700	\$3,432,880	\$2,286,050	\$5,718,930
HYW	Conway	Conway-Horry County Airport	17	7	24	\$479,590	\$276,420	\$756,010	\$1,207,770	\$883,710	\$2,091,480	\$1,687,360	\$1,160,130	\$2,847,490
UDG	Darlington	Darlington County Airport	9	3	12	\$161,540	\$105,790	\$267,330	\$516,900	\$338,790	\$855,690	\$678,440	\$444,580	\$1,123,020
DLC	Dillon	Dillon County Airport	-	-	-	\$6,930	\$4,000	\$10,930	\$18,320	\$12,840	\$31,160	\$25,250	\$16,840	\$42,090
GGE	Georgetown	Georgetown County Airport	90	32	122	\$2,302,390	\$1,304,010	\$3,606,400	\$5,944,190	\$4,219,860	\$10,164,050	\$8,246,580	\$5,523,870	\$13,770,450
GMU	Greenville	Greenville Downtown Airport	81	28	109	\$1,993,690	\$1,175,550	\$3,169,240	\$5,394,650	\$3,773,710	\$9,168,360	\$7,388,340	\$4,949,260	\$12,337,600
GYH	Greenville	Donaldson Field	32	11	43	\$795,260	\$468,910	\$1,264,170	\$2,151,850	\$1,505,290	\$3,657,140	\$2,947,110	\$1,974,200	\$4,921,310
GRD	Greenwood	Greenwood County Airport	14	5	19	\$356,670	\$208,020	\$564,690	\$947,890	\$667,960	\$1,615,850	\$1,304,560	\$875,980	\$2,180,540
3J0	Hampton	Hampton County Airport	-	-	-	\$7,640	\$4,400	\$12,040	\$20,180	\$14,150	\$34,330	\$27,820	\$18,550	\$46,370
HVS	Hartsville	Hartsville Regional Airport	6	2	8	\$105,090	\$68,820	\$173,910	\$336,270	\$220,400	\$556,670	\$441,360	\$289,220	\$730,580
CKI	Kingstree	Williamsburg Regional Airport	3	1	4	\$65,880	\$38,430	\$104,310	\$175,090	\$123,390	\$298,480	\$240,970	\$161,820	\$402,790
51J	Lake City	Lake City Municipal Airport CJ Evans Field	-	-	-	\$7,220	\$4,160	\$11,380	\$19,080	\$13,370	\$32,450	\$26,300	\$17,530	\$43,830
LKR	Lancaster	Lancaster County-McWhirter Field	12	5	17	\$309,020	\$180,230	\$489,250	\$821,260	\$578,730	\$1,399,990	\$1,130,280	\$758,960	\$1,889,240
LUX	Laurens	Laurens County Airport	2	1	3	\$55,020	\$32,040	\$87,060	\$148,070	\$103,040	\$251,110	\$203,090	\$135,080	\$338,170

TABLE 16 – DIRECT, INDIRECT/INDUCED, AND TOTAL ECONOMIC IMPACTS FROM GENERAL AVIATION VISITOR SPENDING

FAA ID	Associated City	Airport Name	Employment			Payroll			Spending			Annual Economic Activity		
			Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total
5J9	Loris	Twin City Airport	1	-	1	\$16,250	\$9,230	\$25,480	\$41,910	\$29,690	\$71,600	\$58,160	\$38,920	\$97,080
MNI	Manning	Santee Cooper Regional Airport	3	-	3	\$62,890	\$36,220	\$99,110	\$166,160	\$116,520	\$282,680	\$229,050	\$152,740	\$381,790
MAO	Marion	Marion County Airport	1	1	2	\$34,970	\$20,140	\$55,110	\$92,400	\$64,800	\$157,200	\$127,370	\$84,940	\$212,310
S19	McCormick	McCormick County Airport	-	-	-	\$4,680	\$2,700	\$7,380	\$12,380	\$8,670	\$21,050	\$17,060	\$11,370	\$28,430
MKS	Moncks Corner	Berkeley County Airport	14	5	19	\$408,740	\$228,180	\$636,920	\$1,009,020	\$733,520	\$1,742,540	\$1,417,760	\$961,700	\$2,379,460
LRO	Mount Pleasant	Mt Pleasant Regional-Faison Field	35	13	48	\$983,240	\$542,860	\$1,526,100	\$2,430,250	\$1,757,670	\$4,187,920	\$3,413,490	\$2,300,530	\$5,714,020
EOE	Newberry	Newberry County Airport	5	2	7	\$132,780	\$76,480	\$209,260	\$350,850	\$246,020	\$596,870	\$483,630	\$322,500	\$806,130
CRE	North Myrtle Beach	Grand Strand Airport	229	79	308	\$5,828,290	\$3,300,950	\$9,129,240	\$15,047,140	\$10,682,180	\$25,729,320	\$20,875,430	\$13,983,130	\$34,858,560
OGB	Orangeburg	Orangeburg Municipal Airport	21	7	28	\$513,010	\$299,200	\$812,210	\$1,363,380	\$960,760	\$2,324,140	\$1,876,390	\$1,259,960	\$3,136,350
PYG	Pageland	Pageland Airport	1	-	1	\$26,990	\$15,550	\$42,540	\$71,320	\$50,010	\$121,330	\$98,310	\$65,560	\$163,870
6J0	Pelion	Lexington County Airport	1	1	2	\$27,240	\$16,490	\$43,730	\$77,000	\$52,920	\$129,920	\$104,240	\$69,410	\$173,650
LQK	Pickens	Pickens County Airport	23	8	31	\$558,150	\$329,110	\$887,260	\$1,510,280	\$1,056,480	\$2,566,760	\$2,068,430	\$1,385,590	\$3,454,020
3J1	Ridgeland	Ridgeland-Claude Dean Airport	2	1	3	\$52,160	\$29,390	\$81,550	\$130,870	\$94,480	\$225,350	\$183,030	\$123,870	\$306,900
UZA	Rock Hill	Rock Hill/York Co/Bryant Field	50	17	67	\$1,246,520	\$727,010	\$1,973,530	\$3,312,780	\$2,334,470	\$5,647,250	\$4,559,300	\$3,061,480	\$7,620,780
6J4	Saluda	Saluda County Airport	1	-	1	\$12,190	\$7,280	\$19,470	\$34,220	\$23,400	\$57,620	\$46,410	\$30,680	\$77,090
SPA	Spartanburg	Spartanburg Downtown Memorial Airport	52	20	72	\$1,500,650	\$830,730	\$2,331,380	\$3,651,950	\$2,671,130	\$6,323,080	\$5,152,600	\$3,501,860	\$8,654,460
6J2	St George	St. George Airport	1	-	1	\$16,660	\$9,180	\$25,840	\$40,820	\$29,550	\$70,370	\$57,480	\$38,730	\$96,210
DYB	Summerville	Summerville Airport	13	6	19	\$396,360	\$221,270	\$617,630	\$978,460	\$711,300	\$1,689,760	\$1,374,820	\$932,570	\$2,307,390
SMS	Sumter	Sumter Airport	25	9	34	\$629,310	\$367,030	\$996,340	\$1,672,470	\$1,178,570	\$2,851,040	\$2,301,780	\$1,545,600	\$3,847,380
6J6	Trenton	Edgefield County Airport	-	1	1	\$6,920	\$4,520	\$11,440	\$22,360	\$14,480	\$36,840	\$29,280	\$19,000	\$48,280
35A	Union	Union County, Troy Shelton Field	1	1	2	\$41,650	\$22,660	\$64,310	\$99,860	\$73,000	\$172,860	\$141,510	\$95,660	\$237,170
RBW	Walterboro	Lowcountry Regional Airport	115	40	155	\$2,862,890	\$1,669,730	\$4,532,620	\$7,608,470	\$5,361,610	\$12,970,080	\$10,471,360	\$7,031,340	\$17,502,700
FDW	Winnsboro	Fairfield County Airport	4	1	5	\$84,230	\$50,330	\$134,560	\$236,520	\$161,770	\$398,290	\$320,750	\$212,100	\$532,850
		<b>General Aviation Airports Total</b>	<b>1,409</b>	<b>500</b>	<b>1,909</b>	<b>\$35,841,540</b>	<b>\$20,563,450</b>	<b>\$56,404,990</b>	<b>\$93,580,330</b>	<b>\$66,280,400</b>	<b>\$159,860,730</b>	<b>\$129,421,870</b>	<b>\$86,843,850</b>	<b>\$216,265,720</b>
		<b>All Airports Total</b>	<b>3,377</b>	<b>1,213</b>	<b>4,590</b>	<b>\$87,810,860</b>	<b>\$49,946,330</b>	<b>\$137,757,190</b>	<b>\$228,613,540</b>	<b>\$161,517,590</b>	<b>\$390,131,130</b>	<b>\$316,424,400</b>	<b>\$211,463,920</b>	<b>\$527,888,320</b>

Source: Airport Managers, Study Surveys, FAA National Offload Program (NOP) Data, Aircraft Owners Pilots Association (AOPA), and IMPLAN (Charleston Metro Chamber of Commerce)

## 4.7 Indirect/Induced and Total Economic Impacts from Commercial Visitors

Direct economic impacts for the commercial visitor spending category for employment, payroll, spending, and annual economic activity were obtained from visitor surveys, study airports, and USDOT. Direct impacts for commercial visitor spending are presented in **Table 9 – Direct Impacts from Commercial Visitor Spending**. Direct impacts were entered in the IMPLAN model to estimate total economic impacts and to determine the portion of each airport’s commercial visitor impacts related to indirect/induced (multiplier) impacts.

For the commercial visitor spending category, **Table 17 – Direct, Indirect, and Total Economic Impacts from Commercial Visitor Spending** presents each commercial airport’s direct, indirect/induced, and total annual economic impacts for employment, payroll, spending, and annual economic activity. Impacts in this category are associated with only the six commercial airports in South Carolina.



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TABLE 17 – DIRECT, INDIRECT, AND TOTAL ECONOMIC IMPACTS FROM COMMERCIAL VISITOR SPENDING

FAA ID	Associated City	Airport Name	Employment			Payroll			Spending			Annual Economic Activity		
			Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total
CHS	Charleston	Charleston International Airport	33,160	12,438	45,598	\$918,504,510	\$511,654,730	\$1,430,159,240	\$2,282,548,090	\$1,667,711,360	\$3,950,259,450	\$3,201,052,600	\$2,179,366,090	\$5,380,418,690
CAE	Columbia	Columbia Metropolitan Airport	3,362	1,133	4,495	\$74,818,050	\$46,855,480	\$121,673,530	\$219,893,120	\$151,537,490	\$371,430,610	\$294,711,170	\$198,392,970	\$493,104,140
FLO	Florence	Florence Regional Airport	150	44	194	\$2,693,820	\$1,816,140	\$4,509,960	\$8,879,840	\$5,866,340	\$14,746,180	\$11,573,660	\$7,682,480	\$19,256,140
GSP	Greer	Greenville-Spartanburg International (Roger Milliken Field)	5,879	2,202	8,081	\$145,287,420	\$90,539,890	\$235,827,310	\$417,546,220	\$293,861,610	\$711,407,830	\$562,833,640	\$384,401,500	\$947,235,140
HXD	Hilton Head Island	Hilton Head Airport	437	189	626	\$13,594,750	\$7,710,360	\$21,305,110	\$34,364,830	\$25,090,620	\$59,455,450	\$47,959,580	\$32,800,980	\$80,760,560
MYR	Myrtle Beach	Myrtle Beach International Airport	17,217	6,257	23,474	\$432,357,720	\$256,446,270	\$688,803,990	\$1,164,423,180	\$838,953,160	\$2,003,376,340	\$1,596,780,900	\$1,095,399,430	\$2,692,180,330
		Commercial Airports Total	60,205	22,263	82,468	\$1,587,256,270	\$915,022,870	\$2,502,279,140	\$4,127,655,280	\$2,983,020,580	\$7,110,675,860	\$5,714,911,550	\$3,898,043,450	\$9,612,955,000

Source: Study Airports, USDOT, Study Surveys, and IMPLAN (Charleston Metro Chamber of Commerce)

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## 5.0 TOTAL ANNUAL ECONOMIC IMPACTS FOR EACH SOUTH CAROLINA AIRPORT

For each of the 57 commercial and general aviation airports analyzed in this study, the airport's total annual economic impact is the sum of its impacts from airport management, airport tenants, average annual capital investment, general aviation visitor spending, and commercial visitor spending. All total economic impacts for each airport are the sum of its direct impacts added to its indirect/induced impacts that come from the multiplier effect.

**Table 18 – Total Annual Statewide Economic Impacts for Each South Carolina Airport** provides a summary of each airport's total annual economic impact estimated in this study. **Table 18** presents total annual economic impacts (employment, payroll, spending, and annual economic activity) for each commercial or general aviation airport resulting from each of the five economic activity centers considered in this report. Total airport economic impacts shown in **Table 18** were estimated using a statewide South Carolina input/economic activity model developed specifically for this analysis. Impacts shown in **Table 18** reflect each airport's total impact on South Carolina's statewide economy.

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TABLE 18 – TOTAL ANNUAL STATEWIDE ECONOMIC IMPACTS FOR EACH SOUTH CAROLINA AIRPORT

FAA ID	Associated City	Airport Name	Employment			Payroll			Spending			Annual Economic Activity		
			Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total
CHS	Charleston	Charleston International Airport	36,050	14,649	50,699	\$1,036,481,680	\$592,086,860	\$1,628,568,540	\$2,519,618,090	\$1,827,966,020	\$4,347,584,110	\$3,556,099,770	\$2,420,052,880	\$5,976,152,650
		– Boeing	7,517	14,256	21,773	\$991,062,310	\$526,957,310	\$1,518,019,620	\$1,808,459,500	\$852,639,010	\$2,661,098,510	\$2,799,521,810	\$1,379,596,320	\$4,179,118,130
		– CHS + Boeing	43,567	28,905	72,472	\$2,027,543,990	\$1,119,044,170	\$3,146,588,160	\$4,328,077,590	\$2,680,605,030	\$7,008,682,620	\$6,355,621,580	\$3,799,649,200	\$10,155,270,780
CAE	Columbia	Columbia Metropolitan Airport	4,454	2,188	6,642	\$118,725,210	\$83,430,750	\$202,155,960	\$325,317,000	\$220,538,490	\$545,855,490	\$444,042,210	\$303,969,240	\$748,011,450
FLO	Florence	Florence Regional Airport	272	139	411	\$8,146,970	\$5,151,620	\$13,298,590	\$20,309,150	\$13,101,160	\$33,410,310	\$28,456,120	\$18,252,780	\$46,708,900
GSP	Greer	Greenville-Spartanburg International (Roger Milliken Field)	7,033	3,284	10,317	\$193,920,150	\$131,941,210	\$325,861,360	\$530,592,830	\$364,314,090	\$894,906,920	\$724,512,980	\$496,255,300	\$1,220,768,280
HXD	Hilton Head Island	Hilton Head Airport	852	434	1,286	\$28,021,260	\$16,165,740	\$44,187,000	\$71,014,640	\$51,029,800	\$122,044,440	\$99,035,900	\$67,195,540	\$166,231,440
MYR	Myrtle Beach	Myrtle Beach International Airport	18,553	7,228	25,781	\$482,067,870	\$296,810,820	\$778,878,690	\$1,280,213,110	\$913,608,200	\$2,193,821,310	\$1,762,280,980	\$1,210,419,020	\$2,972,700,000
		<b>Commercial Airports Total (Boeing EXCLUDED)</b>	<b>67,214</b>	<b>27,922</b>	<b>95,136</b>	<b>\$1,867,363,140</b>	<b>\$1,125,587,000</b>	<b>\$2,992,950,140</b>	<b>\$4,747,064,820</b>	<b>\$3,390,557,760</b>	<b>\$8,137,622,580</b>	<b>\$6,614,427,960</b>	<b>\$4,516,144,760</b>	<b>\$11,130,572,720</b>
		<b>Commercial Airports Total (Boeing INCLUDED)</b>	<b>74,731</b>	<b>42,178</b>	<b>116,909</b>	<b>\$2,858,425,450</b>	<b>\$1,652,544,310</b>	<b>\$4,510,969,760</b>	<b>\$6,555,524,320</b>	<b>\$4,243,196,770</b>	<b>\$10,798,721,090</b>	<b>\$9,413,949,770</b>	<b>\$5,895,741,080</b>	<b>\$15,309,690,850</b>
AIK	Aiken	Aiken Regional Airport	113	65	178	\$2,926,800	\$2,359,230	\$5,286,030	\$11,178,110	\$8,521,530	\$19,699,640	\$14,104,910	\$10,880,760	\$24,985,670
AQX	Allendale	Allendale County Airport	11	4	15	\$340,790	\$193,210	\$534,000	\$782,510	\$470,290	\$1,252,800	\$1,123,300	\$663,500	\$1,786,800
AND	Anderson	Anderson Regional Airport	70	37	107	\$2,415,420	\$1,409,010	\$3,824,430	\$5,315,320	\$3,827,360	\$9,142,680	\$7,730,740	\$5,236,370	\$12,967,110
PHH	Andrews	Robert F. Swinnie Airport	4	2	6	\$136,390	\$105,790	\$242,180	\$349,000	\$269,170	\$618,170	\$485,390	\$374,960	\$860,350
99N	Bamberg	Bamberg County Airport	1	1	2	\$50,990	\$39,370	\$90,360	\$76,710	\$52,540	\$129,250	\$127,700	\$91,910	\$219,610
BNL	Barnwell	Barnwell Regional Airport	10	5	15	\$312,970	\$224,790	\$537,760	\$579,870	\$404,430	\$984,300	\$892,840	\$629,220	\$1,522,060
ARW	Beaufort	Beaufort County Airport	71	39	110	\$2,370,180	\$1,558,740	\$3,928,920	\$4,961,210	\$3,634,650	\$8,595,860	\$7,331,390	\$5,193,390	\$12,524,780
BBP	Bennettsville	Marlboro County Airport - HE Avent Field	5	4	9	\$169,330	\$117,580	\$286,910	\$515,350	\$389,970	\$905,320	\$684,680	\$507,550	\$1,192,230
52J	Bishopville	Lee County Airport-Butters Field	3	3	6	\$160,040	\$96,890	\$256,930	\$283,720	\$200,830	\$484,550	\$443,760	\$297,720	\$741,480
CDN	Camden	Woodward Field	30	31	61	\$1,344,220	\$1,191,250	\$2,535,470	\$2,866,260	\$1,909,350	\$4,775,610	\$4,210,480	\$3,100,600	\$7,311,080
JZI	Charleston	Charleston Executive Airport	299	135	434	\$9,232,180	\$5,307,250	\$14,539,430	\$23,136,870	\$16,950,650	\$40,087,520	\$32,369,050	\$22,257,900	\$54,626,950
CQW	Cheraw	Cheraw Municipal/Lynch Bellinger Field	9	5	14	\$311,350	\$222,550	\$533,900	\$796,890	\$613,400	\$1,410,290	\$1,108,240	\$835,950	\$1,944,190
DCM	Chester	Chester Catawba Regional Airport	26	23	49	\$923,220	\$762,380	\$1,685,600	\$1,889,190	\$1,606,470	\$3,495,660	\$2,812,410	\$2,368,850	\$5,181,260
CEU	Clemson	Oconee County Regional Airport	65	29	94	\$2,082,460	\$1,194,700	\$3,277,160	\$4,447,980	\$3,172,140	\$7,620,120	\$6,530,440	\$4,366,840	\$10,897,280
CUB	Columbia	Jim Hamilton - LB Owens Airport	73	43	116	\$2,278,470	\$1,751,030	\$4,029,500	\$6,881,290	\$5,209,420	\$12,090,710	\$9,159,760	\$6,960,450	\$16,120,210
HYW	Conway	Conway-Horry County Airport	39	33	72	\$1,699,320	\$1,540,540	\$3,239,860	\$3,469,910	\$2,386,750	\$5,856,660	\$5,169,230	\$3,927,290	\$9,096,520
UDG	Darlington	Darlington County Airport	20	14	34	\$992,900	\$542,400	\$1,535,300	\$1,644,790	\$1,351,330	\$2,996,120	\$2,637,690	\$1,893,730	\$4,531,420
DLC	Dillon	Dillon County Airport	1	-	1	\$26,930	\$22,630	\$49,560	\$38,320	\$29,290	\$67,610	\$65,250	\$51,920	\$117,170
GGE	Georgetown	Georgetown County Airport	108	49	157	\$3,079,270	\$1,991,590	\$5,070,860	\$8,358,650	\$6,072,230	\$14,430,880	\$11,437,920	\$8,063,820	\$19,501,740
GMU	Greenville	Greenville Downtown Airport	269	278	547	\$14,752,370	\$10,222,840	\$24,975,210	\$24,692,900	\$19,178,770	\$43,871,670	\$39,445,270	\$29,401,610	\$68,846,880
GYH	Greenville	Donaldson Field	890	982	1,872	\$70,338,180	\$58,927,200	\$129,265,380	\$212,697,930	\$180,443,660	\$393,141,590	\$283,036,110	\$239,370,860	\$522,406,970
GRD	Greenwood	Greenwood County Airport	30	24	54	\$1,181,540	\$937,670	\$2,119,210	\$3,201,150	\$2,397,100	\$5,598,250	\$4,382,690	\$3,334,770	\$7,717,460
3J0	Hampton	Hampton County Airport	13	17	30	\$792,380	\$740,490	\$1,532,870	\$1,106,740	\$750,320	\$1,857,060	\$1,899,120	\$1,490,810	\$3,389,930
HVS	Hartsville	Hartsville Regional Airport	10	8	18	\$301,090	\$231,250	\$532,340	\$924,240	\$650,870	\$1,575,110	\$1,225,330	\$882,120	\$2,107,450
CKI	Kingstree	Williamsburg Regional Airport	14	4	18	\$523,010	\$228,960	\$751,970	\$1,542,350	\$846,290	\$2,388,640	\$2,065,360	\$1,075,250	\$3,140,610



TABLE 18 – TOTAL ANNUAL STATEWIDE ECONOMIC IMPACTS FOR EACH SOUTH CAROLINA AIRPORT

FAA ID	Associated City	Airport Name	Employment			Payroll			Spending			Annual Economic Activity		
			Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total	Direct	Indirect/Induced	Total
51J	Lake City	Lake City Municipal Airport CJ Evans Field	-	1	1	\$29,410	\$23,680	\$53,090	\$36,780	\$26,130	\$62,910	\$66,190	\$49,810	\$116,000
LKR	Lancaster	Lancaster County-McWhirter Field	21	13	34	\$734,140	\$475,260	\$1,209,400	\$1,942,370	\$1,365,510	\$3,307,880	\$2,676,510	\$1,840,770	\$4,517,280
LUX	Laurens	Laurens County Airport	10	8	18	\$417,020	\$286,820	\$703,840	\$854,900	\$598,670	\$1,453,570	\$1,271,920	\$885,490	\$2,157,410
5J9	Loris	Twin City Airport	2	-	2	\$40,220	\$30,230	\$70,450	\$72,710	\$52,810	\$125,520	\$112,930	\$83,040	\$195,970
MNI	Manning	Santee Cooper Regional Airport	9	6	15	\$261,240	\$198,390	\$459,630	\$899,440	\$744,420	\$1,643,860	\$1,160,680	\$942,810	\$2,103,490
MAO	Marion	Marion County Airport	15	19	34	\$886,000	\$815,660	\$1,701,660	\$1,336,220	\$898,020	\$2,234,240	\$2,222,220	\$1,713,680	\$3,935,900
S19	McCormick	McCormick County Airport	1	-	1	\$29,770	\$26,080	\$55,850	\$22,380	\$16,890	\$39,270	\$52,150	\$42,970	\$95,120
MKS	Moncks Corner	Berkeley County Airport	31	20	51	\$1,231,760	\$858,430	\$2,090,190	\$2,897,620	\$1,995,540	\$4,893,160	\$4,129,380	\$2,853,970	\$6,983,350
LRO	Mount Pleasant	Mt Pleasant Regional-Faison Field	51	26	77	\$1,599,780	\$988,420	\$2,588,200	\$3,574,470	\$2,631,500	\$6,205,970	\$5,174,250	\$3,619,920	\$8,794,170
EOE	Newberry	Newberry County Airport	22	14	36	\$923,600	\$547,530	\$1,471,130	\$2,461,200	\$1,623,940	\$4,085,140	\$3,384,800	\$2,171,470	\$5,556,270
CRE	North Myrtle Beach	Grand Strand Airport	268	117	385	\$7,572,370	\$4,762,210	\$12,334,580	\$18,266,090	\$12,907,840	\$31,173,930	\$25,838,460	\$17,670,050	\$43,508,510
OGB	Orangeburg	Orangeburg Municipal Airport	29	15	44	\$920,370	\$638,400	\$1,558,770	\$2,173,290	\$1,639,260	\$3,812,550	\$3,093,660	\$2,277,660	\$5,371,320
PYG	Pageland	Pageland Airport	4	1	5	\$118,740	\$76,620	\$195,360	\$299,330	\$199,340	\$498,670	\$418,070	\$275,960	\$694,030
6J0	Pelion	Lexington County Airport	7	4	11	\$279,280	\$172,250	\$451,530	\$837,330	\$555,230	\$1,392,560	\$1,116,610	\$727,480	\$1,844,090
LQK	Pickens	Pickens County Airport	39	22	61	\$1,244,970	\$846,650	\$2,091,620	\$2,746,660	\$1,921,040	\$4,667,700	\$3,991,630	\$2,767,690	\$6,759,320
3J1	Ridgeland	Ridgeland-Claude Dean Airport	30	24	54	\$1,322,810	\$818,880	\$2,141,690	\$3,562,810	\$2,579,470	\$6,142,280	\$4,885,620	\$3,398,350	\$8,283,970
UZA	Rock Hill	Rock Hill/York Co/Bryant Field	122	102	224	\$5,840,830	\$4,132,380	\$9,973,210	\$17,166,170	\$13,394,650	\$30,560,820	\$23,007,000	\$17,527,030	\$40,534,030
6J4	Saluda	Saluda County Airport	4	2	6	\$104,500	\$75,620	\$180,120	\$293,210	\$135,370	\$428,580	\$397,710	\$210,990	\$608,700
SPA	Spartanburg	Spartanburg Downtown Memorial Airport	170	158	328	\$7,712,910	\$4,774,910	\$12,487,820	\$16,537,960	\$12,770,920	\$29,308,880	\$24,250,870	\$17,545,830	\$41,796,700
6J2	St George	St. George Airport	2	1	3	\$56,090	\$39,220	\$95,310	\$112,860	\$79,510	\$192,370	\$168,950	\$118,730	\$287,680
DYB	Summerville	Summerville Airport	26	18	44	\$943,460	\$660,440	\$1,603,900	\$2,346,160	\$1,664,120	\$4,010,280	\$3,289,620	\$2,324,560	\$5,614,180
SMS	Sumter	Sumter Airport	64	56	120	\$3,315,140	\$2,316,090	\$5,631,230	\$6,621,940	\$4,845,450	\$11,467,390	\$9,937,080	\$7,161,540	\$17,098,620
6J6	Trenton	Edgefield County Airport	1	1	2	\$26,920	\$23,150	\$50,070	\$49,740	\$38,430	\$88,170	\$76,660	\$61,580	\$138,240
35A	Union	Union County, Troy Shelton Field	8	7	15	\$327,740	\$240,880	\$568,620	\$585,560	\$455,240	\$1,040,800	\$913,300	\$696,120	\$1,609,420
RBW	Walterboro	Lowcountry Regional Airport	147	80	227	\$4,520,420	\$3,129,080	\$7,649,500	\$11,237,700	\$7,551,830	\$18,789,530	\$15,758,120	\$10,680,910	\$26,439,030
FDW	Winnsboro	Fairfield County Airport	18	15	33	\$700,920	\$560,210	\$1,261,130	\$2,105,270	\$1,640,580	\$3,745,850	\$2,806,190	\$2,200,790	\$5,006,980
		<b>General Aviation Airports Total</b>	3,285	2,565	5,850	\$159,902,210	\$119,436,830	\$279,339,040	\$420,777,430	\$333,670,520	\$754,447,950	\$580,679,640	\$453,107,350	\$1,033,786,990
		<b>All Airports Total (Boeing EXCLUDED)</b>	<b>70,499</b>	<b>30,487</b>	<b>100,986</b>	<b>\$2,027,265,350</b>	<b>\$1,245,023,830</b>	<b>\$3,272,289,180</b>	<b>\$5,167,842,250</b>	<b>\$3,724,228,280</b>	<b>\$8,892,070,530</b>	<b>\$7,195,107,600</b>	<b>\$4,969,252,110</b>	<b>\$12,164,359,710</b>
		<b>All Airports Total (Boeing INCLUDED)</b>	<b>78,016</b>	<b>44,743</b>	<b>122,759</b>	<b>\$3,018,327,660</b>	<b>\$1,771,981,140</b>	<b>\$4,790,308,800</b>	<b>\$6,976,301,750</b>	<b>\$4,576,867,290</b>	<b>\$11,553,169,040</b>	<b>\$9,994,629,410</b>	<b>\$6,348,848,430</b>	<b>\$16,343,477,840</b>

Source: Jviation

## 6.0 TOTAL ANNUAL STATEWIDE ECONOMIC IMPACTS FOR ALL SOUTH CAROLINA AIRPORTS

Annual direct, indirect/induced, and total economic impacts have been estimated for each of the commercial and general aviation airports in South Carolina that were included in this study. Summed, these airport specific impacts equal total statewide economic impacts for each of the five economic impact activity centers. Total statewide annual economic impacts for all airports are summarized in **Table 19**, **Table 20**, **Table 21**, **Table 22**, and **Table 23**. Information on total statewide impacts for airport tenants and capital investment categories (presented here) include the estimated annual economic impacts for Boeing at Charleston International.

TABLE 19 – TOTAL STATEWIDE ANNUAL ECONOMIC IMPACTS FROM AIRPORT MANAGEMENT

Impact Measure	Direct	Indirect/Induced	Total
Employment	707	667	1,374
Payroll	\$33,490,180	\$31,196,550	\$64,686,730
Spending	\$37,927,620	\$31,191,460	\$69,119,080
Annual Economic Activity	\$71,417,800	\$62,388,010	\$133,805,810

Source: Jviation

Note: Results include both commercial and general aviation airports

TABLE 20 – TOTAL STATEWIDE ANNUAL ECONOMIC IMPACTS FROM AIRPORT TENANTS

Impact Measure	Direct	Indirect/Induced	Total
Employment	12,205	19,611	31,816
Payroll	\$1,236,615,460	\$732,948,270	\$1,969,563,730
Spending	\$2,368,283,770	\$1,263,040,370	\$3,631,324,140
Annual Economic Activity	\$3,604,899,230	\$1,995,988,640	\$5,600,887,870

Source: Jviation

Note: Results include both commercial and general aviation airports

TABLE 21 – STATEWIDE ANNUAL ECONOMIC IMPACTS FROM ALL AVERAGE ANNUAL CAPITAL INVESTMENT

Impact Measure	Direct	Indirect/Induced	Total
Employment	1,522	989	2,511
Payroll	\$73,154,890	\$42,867,120	\$116,022,010
Spending	\$213,821,540	\$138,097,290	\$351,918,830
Annual Economic Activity	\$286,976,430	\$180,964,410	\$467,940,840

Source: Jviation

TABLE 22 – STATEWIDE ANNUAL ECONOMIC IMPACTS FROM ALL GENERAL AVIATION VISITOR SPENDING

Impact Measure	Direct	Indirect/Induced	Total
Employment	3,377	1,213	4,590
Payroll	\$87,810,860	\$49,946,330	\$137,757,190
Spending	\$228,613,540	\$161,517,590	\$390,131,130
Annual Economic Activity	\$316,424,400	\$211,463,920	\$527,888,320

Source: Jviation

TABLE 23 – STATEWIDE ANNUAL ECONOMIC IMPACTS FROM ALL COMMERCIAL VISITOR SPENDING

Impact Measure	Direct	Indirect/Induced	Total
Employment	60,205	22,263	82,468
Payroll	\$1,587,256,270	\$915,022,870	\$2,502,279,140
Spending	\$4,127,655,280	\$2,983,020,580	\$7,110,675,860
Annual Economic Activity	\$5,714,911,550	\$3,898,043,450	\$9,612,955,000

Source: Jviation

**Table 24 – Total Annual Statewide Economic Impacts From All Impact Categories for All South Carolina Airports** presents total annual employment, payroll, spending, and economic activity for South Carolina airports, as they were estimated in this study. Total annual statewide economic impacts reported in **Table 24** also include those for Boeing at Charleston International.

TABLE 24 – TOTAL ANNUAL STATEWIDE ECONOMIC IMPACTS FROM ALL IMPACT CATEGORIES FOR ALL SOUTH CAROLINA AIRPORTS

Employment			
Activity Center	Direct	Indirect/Induced	Total
Airport Management	707	667	1,374
Airport Tenants	5,262	5,725	10,987
Boeing Tenant	6,943	13,886	20,829
Capital Investments	948	619	1,567
Boeing Capital Investments	574	370	944
General Aviation Visitors	3,377	1,213	4,590
Commercial Visitors	60,205	22,263	82,468
<b>Total (Boeing EXCLUDED)</b>	<b>70,499</b>	<b>30,487</b>	<b>100,986</b>
<b>Total (Boeing INCLUDED)</b>	<b>78,016</b>	<b>44,743</b>	<b>122,759</b>
Payroll			
Activity Center	Direct	Indirect/Induced	Total
Airport Management	\$33,490,180	\$31,196,550	\$64,686,730
Airport Tenants	\$273,065,330	\$222,111,610	\$495,176,940
Boeing Tenant	\$963,550,130	\$510,836,660	\$1,474,386,790
Capital Investments	\$45,642,710	\$26,746,470	\$72,389,180

TABLE 24 – TOTAL ANNUAL STATEWIDE ECONOMIC IMPACTS FROM ALL IMPACT CATEGORIES FOR ALL SOUTH CAROLINA AIRPORTS

Boeing Capital Investments	\$27,512,180	\$16,120,650	\$43,632,830
General Aviation Visitors	\$87,810,860	\$49,946,330	\$137,757,190
Commercial Visitors	\$1,587,256,270	\$915,022,870	\$2,502,279,140
<b>Total (Boeing EXCLUDED)</b>	<b>\$2,027,265,350</b>	<b>\$1,245,023,830</b>	<b>\$3,272,289,180</b>
<b>Total (Boeing INCLUDED)</b>	<b>\$3,018,327,660</b>	<b>\$1,771,981,140</b>	<b>\$4,790,308,800</b>
<b>Spending</b>			
<b>Activity Center</b>	<b>Direct</b>	<b>Indirect/Induced</b>	<b>Total</b>
Airport Management	\$37,927,620	\$31,191,460	\$69,119,080
Airport Tenants	\$640,231,360	\$462,149,850	\$1,102,381,210
Boeing Tenant	\$1,728,052,410	\$800,890,520	\$2,528,942,930
Capital Investments	\$133,414,450	\$86,348,800	\$219,763,250
Boeing Capital Investments	\$80,407,090	\$51,748,490	\$132,155,580
General Aviation Visitors	\$228,613,540	\$161,517,590	\$390,131,130
Commercial Visitors	\$4,127,655,280	\$2,983,020,580	\$7,110,675,860
<b>Total (Boeing EXCLUDED)</b>	<b>\$5,167,842,250</b>	<b>\$3,724,228,280</b>	<b>\$8,892,070,530</b>
<b>Total (Boeing INCLUDED)</b>	<b>\$6,976,301,750</b>	<b>\$4,576,867,290</b>	<b>\$11,553,169,040</b>
<b>Annual Economic Activity</b>			
<b>Activity Center</b>	<b>Direct</b>	<b>Indirect/Induced</b>	<b>Total</b>
Airport Management	\$71,417,800	\$62,388,010	\$133,805,810
Airport Tenants	\$913,296,690	\$684,261,460	\$1,597,558,150
Boeing Tenant	\$2,691,602,540	\$1,311,727,180	\$4,003,329,720
Capital Investments	\$179,057,160	\$113,095,270	\$292,152,430
Boeing Capital Investments	\$107,919,270	\$67,869,140	\$175,788,410
General Aviation Visitors	\$316,424,400	\$211,463,920	\$527,888,320
Commercial Visitors	\$5,714,911,550	\$3,898,043,450	\$9,612,955,000
<b>Total (Boeing EXCLUDED)</b>	<b>\$7,195,107,600</b>	<b>\$4,969,252,110</b>	<b>\$12,164,359,710</b>
<b>Total (Boeing INCLUDED)</b>	<b>\$9,994,629,410</b>	<b>\$6,348,848,430</b>	<b>\$16,343,477,840</b>

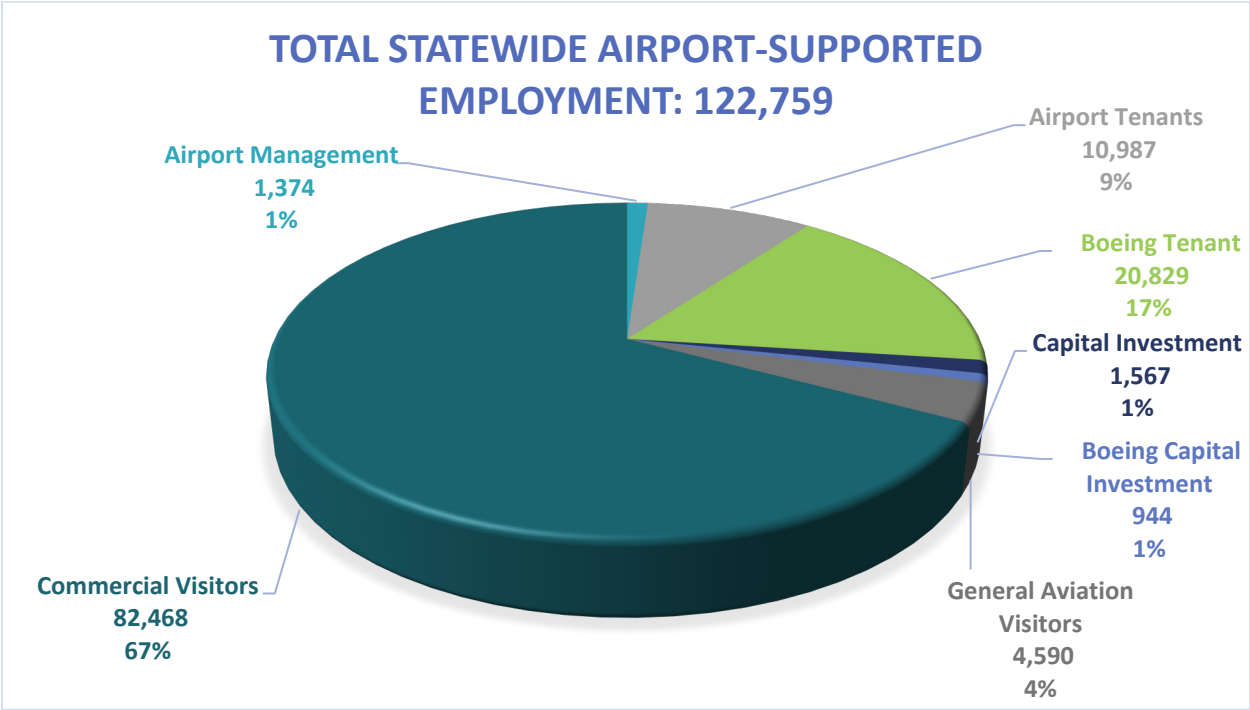
Source: Jviation

As shown in **Table 24**, this Statewide Aviation Economic Impact Study estimates the following total annual statewide economic impacts for all 57 study airports in South Carolina:

- Total Jobs: **122,759**
- Total Annual Payroll: **\$4.8 billion**
- Total Annual Spending: **\$11.5 billion**
- Total Annual Economic Activity: **\$16.3 billion**

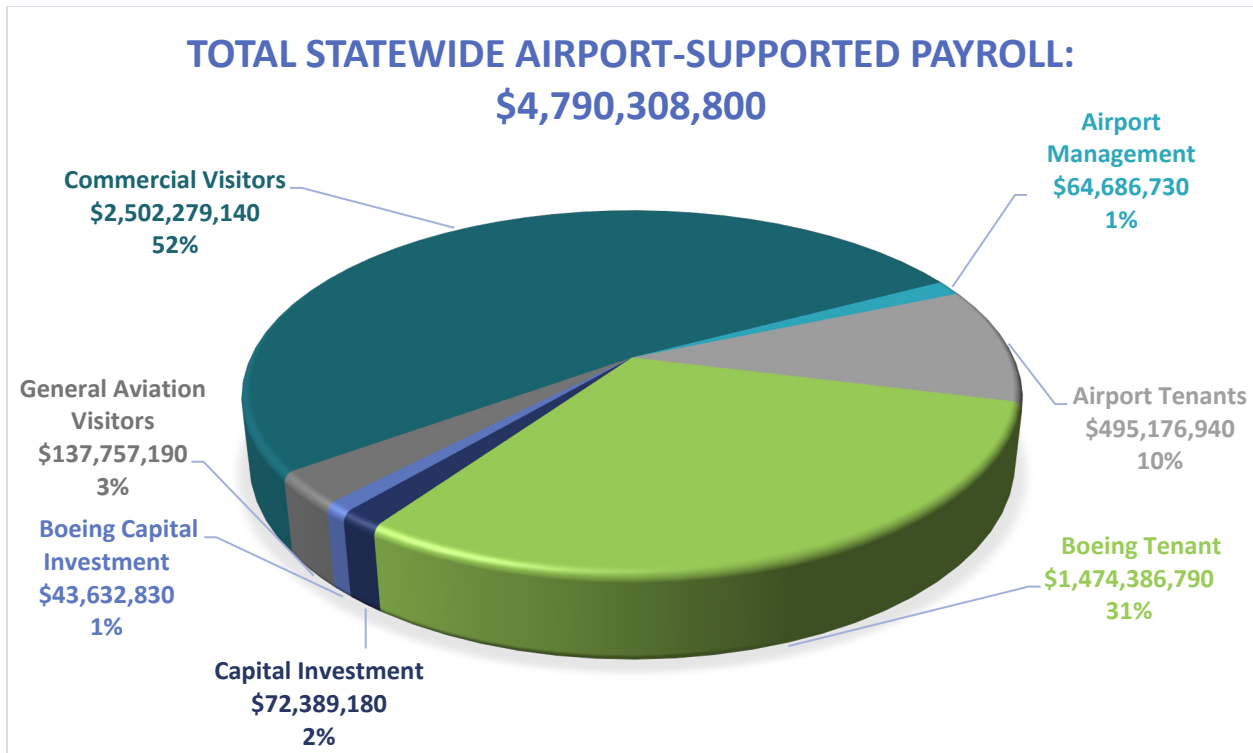
Figure 2 – Percent of Total Statewide Airport Employment Impact by Activity Center, Figure 3 – Percent of Total Statewide Airport Payroll Economic Impacts by Activity Center, and Figure 4 – Percent of Total Statewide Airport Spending Economic Impacts by Activity Center help summarize the information presented in Table 24. These figures show the percent contribution made by each of the economic activity centers that contribute to total statewide employment, payroll, and spending estimated in this study for all study airports.

FIGURE 2 – PERCENT OF TOTAL STATEWIDE AIRPORT EMPLOYMENT IMPACT BY ACTIVITY CENTER



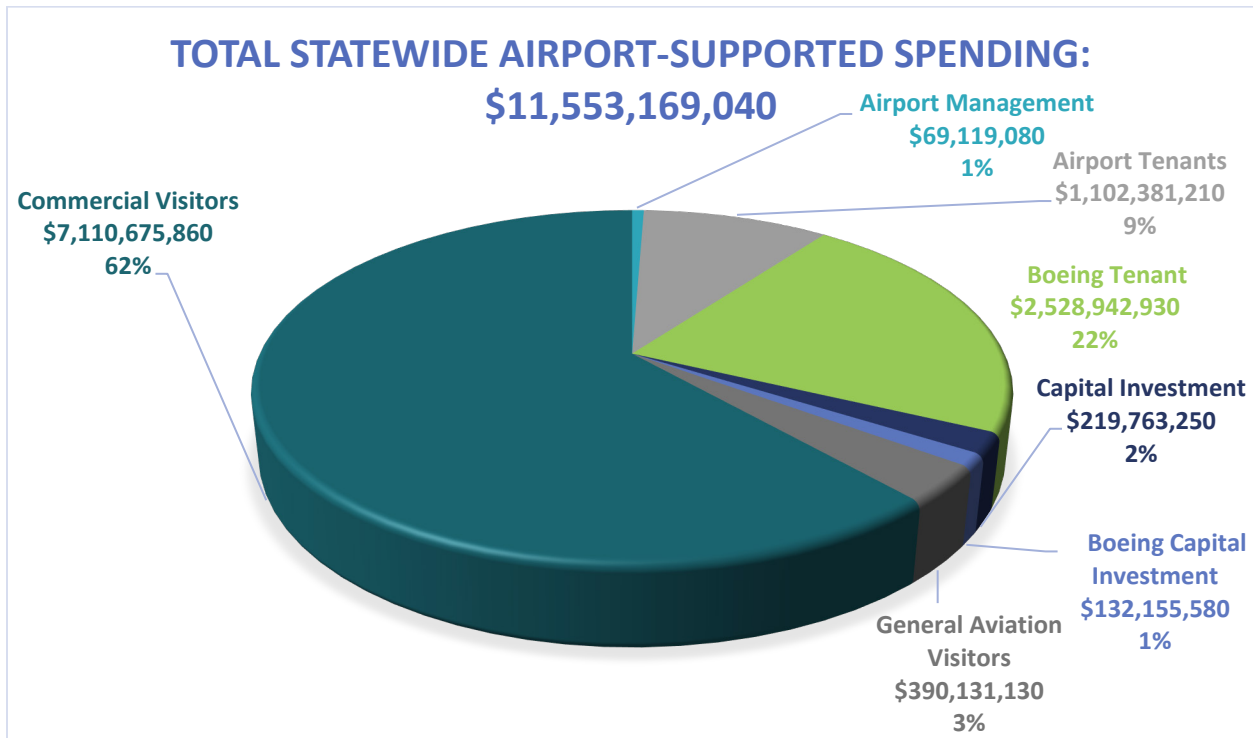
Source: Jviation

FIGURE 3 – PERCENT OF TOTAL STATEWIDE AIRPORT PAYROLL ECONOMIC IMPACTS BY ACTIVITY CENTER



Source: Jviation

FIGURE 4 – PERCENT OF TOTAL STATEWIDE AIRPORT SPENDING ECONOMIC IMPACTS BY ACTIVITY CENTER



Source: Jviation

## 7.0 STATEWIDE TAX REVENUE ANALYSIS FOR SOUTH CAROLINA COMMERCIAL AND GENERAL AVIATION AIRPORTS

As part of SCAC's statewide economic impact study, analysis was undertaken to estimate annual tax revenues South Carolina realizes from 57 commercial and general aviation airports. Analysis shows that on an annual basis airports and airport supported activities in South Carolina contribute an estimated \$657 million in tax revenues to state and local governments.

This section of the technical report documents tax revenue generated from direct airport economic impacts the airports support. For this portion of the study analysis, estimates of tax revenue come only from "direct" economic impacts identified earlier in the report. This conservative approach was taken to prevent overstating the value of airport associated tax revenues in South Carolina.

The section of the report provides:

- An overview of how and where airport supported activities becomes a taxable event.
- What specific taxes are relevant.
- Estimates of tax revenues, statewide and for individual South Carolina airports.

### 7.1 Taxable Events for Activities Associated with South Carolina Airports

Taxes estimated in this analysis are associated with the following types of taxable events:

- *Sales tax on the taxable portion of goods and services purchased by airports and airport tenants.* Each year, airport management and airport tenants purchase goods and supplies that enable them to operate. These expenditures, for the most part, are subject to sales tax. Some purchases by tenants on aircraft parts and supplies are tax exempt. Tax exemptions have been taken into account in the estimated tax revenues reported in this section.
- *Sales tax on the taxable portion of spending to support the implementation of capital projects.* Purchases for goods, materials, and supplies to implement capital improvement projects are expenditures subject to sales tax.
- *Sales tax paid by employees in South Carolina whose jobs are supported by the airports or airport-related activities.* In South Carolina, airport management, airport tenants, capital spending, and air visitor spending all support direct employment. All airport associated employees use part of their income (payroll) each year on expenditures that are subject to sales tax.
- *Sales tax paid by visitors to South Carolina.* When visitors come to South Carolina on a commercial airline flight or on a general aviation aircraft, they often have expenditures for lodging, food, rental cars, entertainment, and retail purchases. These expenditures are subject to sales tax.
- *State income tax paid by all workers whose jobs are supported by the airports or airport activities.* The payroll for all direct jobs in the airport management, airport tenant, capital investment, and air visitor categories is subject to South Carolina's state income tax.

The following portions of this section discuss tax revenues that are generated by the activities noted above.



## 7.2 Sales Tax Applicable to Airport-Supported Activities

Sales taxes are the most important component of airport-related tax revenue. For this analysis, sales tax is associated with:

- Purchases made by airports,
- Purchases made by airport tenants,<sup>1</sup>
- Purchases made to support airport capital improvement projects,
- Purchases made by visitors, and
- Purchases by employees whose jobs are supported by airports and airport associated activities.

In addition, South Carolina collects aviation fuel subject to sales tax, but these tax revenues are designated for capital improvement and maintenance projects at airports by state law. Fuel tax revenues were not estimated as part of this particular analysis. Municipalities throughout the state also levy a property tax on aircraft; these taxes were not identified as part of this analysis and are not included in tax revenues documented here.

Sales taxes are levied at the state and local level. South Carolina law allows the imposition of sales and use taxes by counties and cities, under certain circumstances. Local option sales and use taxes that can be levied in South Carolina include, but are not limited to, county taxes, municipal taxes, hospitality taxes, and accommodations taxes. The state sales and use tax rate is 6%.

Published local (counties and cities) option sales and use tax rates range from 0% to 2.5%. Not all counties and cities have adopted a local option sales tax. Hospitality taxes, which include meals, food, and beverages (including alcohol), range from 1% to 2.5% and are levied by 22 communities. Thirty-four (34) municipalities levy an accommodations tax (also known as a lodging tax) that ranges from 1% to 4%.

For this study, an effective statewide lodging tax rate of 2.63% was used. This tax rate is based on average rates. This statewide effective tax rate for lodging is associated with visitor spending. When visitors fly to South Carolina and spend one or more nights, it is unknown in which specific county/city the lodging occurs. Therefore, the statewide effective tax rate was used to estimate sales tax generated in association with visitor expenditures for lodging.

For transactions in South Carolina that are subject to a sales tax, the total tax paid is the sum of the applicable sales tax for the state and other local taxes. For example, in Myrtle Beach the sales and use tax is the sum of state tax (6%), plus county tax (1%), plus city tax (1%), for a total sales tax of 8%. The applicable local sales tax rates are used in estimating sales taxes only for purchases related to airport management, tenant, and capital expenditures since it can be assumed those transactions occur primarily in the area where the airport is located.

For sales taxes associated with visitor-related spending, since the location of these transactions is unknown, the minimum local tax rate (0%) is combined with state sales tax rate (6%), plus (if applicable) the effective accommodations tax rate (2.63%). No hospitality tax was used for dining purchases since only 22 counties impose them. Minimum sales tax rates were used for visitor spending purchases to maintain a conservative approach to estimating tax revenues. **Table 25 – South Carolina State and Local Sales/Use Tax Rates as of October 2017** lists applicable state and local sales tax rates used in this analysis.

<sup>1</sup> Aircraft parts are not subject to sales tax

TABLE 25 – SOUTH CAROLINA STATE AND LOCAL SALES/USE TAX RATES AS OF OCTOBER 2017

Tax Type	Number of Municipalities with Tax Type in Effect	Tax Rate/Rate Range	Effective Tax Rates Used	Applies to
State Sales and Use Tax	All	6%	6%	– All airport management, tenant, and CIP purchases – All commercial service & GA visitor spending
Local Option Sales and Use Tax	48 Counties	1-2.5%	1-2.5%	Airport management, tenant, and CIP purchases by Locality
City Tax	1 City*	1%	1%	Airport management, tenant, and CIP purchases in the City of Myrtle Beach
Hospitality Tax (meals food, beverages including alcohol)	22 Counties	1-2.5%	0%	Not used
Accommodations (Lodging) Tax	34 Counties	1-4%	2.63%**	All Lodging-related visitor expenditures

Source: South Carolina Department of Revenue

Notes: \* Myrtle Beach is the only city with a city tax in effect (1%).

\*\*Effective lodging tax rates were developed based on lodging tax rates from 34 counties and/or cities.

State income tax is applicable to all payroll associated with employees in South Carolina who have an airport-supported job. This includes all direct jobs identified in this study that are associated with airport management, airport tenants, jobs supported by capital spending, and jobs supported by visitor spending. Like the federal government, South Carolina has a state income tax rate that applies higher tax rates to higher income levels. South Carolina income tax brackets range from 0% at the lowest level to a top rate of 7%.

### 7.3 Sales and Income Tax Revenues from Commercial and General Aviation Airports in South Carolina

Economic impact studies estimate jobs, payroll, and the spending associated with different groups either engaged directly in airport activities or in supporting visitor services or capital spending. For this study, economic impacts for direct jobs, payroll, and spending were estimated for each of the following activities:

- Airport management
- Tenants (aviation businesses) at airports
- Spending for capital improvements at airports
- Spending by commercial aviation visitors
- Spending by general aviation visitors

Each of these categories help to contribute the sales tax revenues estimated in this section of the report. The approach adopted for this tax analysis is bottom-up. Estimates of tax revenues attributed to airports and airport supported activities were developed for each airport, as they relate direct economic impacts from jobs, payroll, and spending. These bottom-up impacts are then summed to reflect statewide sales and income tax impacts.

### 7.3.1 Sales Taxes Generated by Direct Airport Management Spending

Sales taxes associated with airport management were estimated considering data reported by each airport on its annual taxable spending for goods and supplies that are needed to operate the airport. The airport's applicable sales tax rate (see **Table 25**) was then applied to the estimated annual taxable spending for airport management. Estimates of sales tax associated with the airport management category were generated using the following generalized formula:

$$\text{Sales Taxes} = (\text{Annual Spending} \times \text{Sales Tax Rate}) / (1 + \text{Sales Tax Rate})$$

Example for Columbia Metropolitan Airport (CAE)

*\$4.9 million in Direct Taxable Annual Spending to Support Airport Operations Generates:*

*\$278,000 in State Sales Tax*

*+*

*\$49,000 in County Sales Tax*

*=*

***\$327,000 in Total Annual Sales Tax Related to Direct Spending to Operate Airports***

Each airport's spending is subject to the applicable tax rates, depending on its locality. All airport spending is subject to the statewide sales tax rate of 6%, while local option sales and use tax rates range from 0% to as high as 2.5% depending on county/city. Myrtle Beach is the only city with a city tax rate, which is 1%. The state, local option, and city tax rates combine for an effective tax rate for each individual airport; these tax rates range from 6% to 8.5%. **Table 1** and **Table 10** presented information on airport management direct spending used to develop sales tax revenue estimates for this category.

Statewide tax revenues from direct airport management spending are presented in **Table 26 – Estimated South Carolina Statewide Sales Tax Revenues from Direct Airport and Airport-Supported Activities**. On an annual basis, statewide sales tax revenues generated from spending for good and supplies needed to operate the state's public airport system is estimated at \$2.6 million. This annual sales tax revenue is based on estimated direct annual spending in the airport management category, estimated in this study to be \$38 million.

### 7.3.2 Sales Taxes Generated by Direct Airport Tenant Spending

Sales tax revenues associated with airport tenants were estimated considering data reported by each tenant on its annual taxable spending for goods and supplies needed to operate their business. The applicable sales tax rate for the airport where the tenant is located (see **Table 25**) was then applied to the estimated annual taxable spending for airport tenants. Estimates of sales tax revenues associated with the airport tenant category were generated using the following generalized formula:

$$\text{Sales Taxes} = (\text{Annual Spending} \times \text{Sales Tax Rate}) / (1 + \text{Sales Tax Rate})$$

Example for Columbia Metropolitan Airport (CAE)

*\$78 million in Taxable Direct Annual Spending to Support Tenants Operations Generates:*

*\$4.4 million in State Sales Tax*

*+*

*\$772,000 in County Sales Tax*

*=*

***\$5.2 million in Total Annual Sales Tax Related to Direct Tenant Spending to Support Operations***

Each airport's tenant spending is subject to the applicable tax rates depending on its locality. All tenant spending is subject to the statewide sales tax rate of 6%, while local option sales and use tax rates range from 0% to as high as 2.5% depending on county/locality. Myrtle Beach is the only city with a city tax rate, which is 1%. The state, local option, and city tax rates combine for an effective tax rate by each individual airport, which range from 6% to 8.5%. **Table 2, Table 5, and Table 10** presented information on airport tenant direct spending used to develop tax revenue estimates for this category.

Statewide tax revenues from direct airport tenant spending are presented in **Table 26**. Direct annual taxable tenant spending was estimated in this report at \$1.5 billion, which accounts for the statewide tax exemption on aircraft parts. Assumptions were also made related to Boeing at Charleston International Airport to account for direct spending that occurs outside of South Carolina.

On an annual basis, statewide sales tax revenues generated from tenant spending for goods, services (excluding labor), and supplies are estimated at \$112 million. Of the \$112 million in total tenant sales tax revenues, an estimated \$70 million, or 63%, of the total is related to Boeing spending.

### 7.3.3 Sales Tax Generated by Direct Capital Investment Spending

Most of the 57 study airports had some reported average annual investment/spending to support capital improvement projects. This investment is primarily attributable to state and federal grants and local funds used to leverage grants; but in some cases, private/third party capital spending was also identified for tenants. Some of the larger airports, through surplus revenues, have also funded their own projects.

Capital investment identified in this study, reflects both cost of labor to implement projects, as well as cost of goods, materials, and supplies required for constructing a project. For this analysis, sales tax applies only to the portion of the capital investment that relates to the purchase of goods, material, and supplies. To identify only capital spending, payroll was subtracted from the total capital investment estimates provided by SCAC, FAA, airports, and airport tenants.

The applicable sales tax rate for each airport was applied to estimated spending for goods, materials, and supplies used to implement capital improvements. The following generalized formulas were used to estimate sales tax revenue associated with capital spending:

$$\text{Taxable Expenditures} = \text{Direct Spending} - \text{Direct Payroll}$$

$$\text{Sales Taxes} = (\text{Taxable Expenditures} \times \text{Sales Tax Rate}) / (1 + \text{Sales Tax Rate})$$

#### Example for Columbia Metropolitan Airport (CAE)

*\$7.7 million in Taxable Direct Annual Spending to Support Annual Capital Projects Generates:*

*\$434,000 in State Sales Tax*

*+*

*\$76,000 in County Sales Tax*

*=*

***\$510,000 million in Total Annual Sales Tax Related to Direct Spending to Support Capital Projects***

Each airport's capital spending is subject to the applicable sales tax rates depending on its locality. All capital spending (excluding labor) is subject to the statewide sales tax rate of 6%, while local option sales and use tax rates range from 0% to 2.5%, depending on county/locality. Myrtle Beach is the only city with a city tax rate, which is 1%. The state, local option, and city tax rates combine for an effective tax rate for each individual airport; these rates range from 6% to 8.5%. **Table 4, Table 5, and Table 10** presented information on direct airport tenant spending used to develop sales tax revenue estimates for this category.

Statewide tax revenues from direct capital spending are presented in **Table 26**. This analysis estimated that approximately \$16 million in annual state sales tax revenues come from average annual capital spending at the 57 public airports. These sales tax revenues are associated with an estimated average annual capital spending of \$213.8 million for all airports. Of the average annual statewide capital spending estimate, approximately \$6.5 million, or 41% of the total is associated with capital investment by Boeing at Charleston International.

### 7.3.4 Sales Tax Generated by Direct Visitor Spending

Considerable effort went into surveying visitors arriving at South Carolina's airports to track expenditure patterns for lodging, restaurants, retail purchases, rental cars, and entertainment. For each airport, total annual visitors were estimated, and surveys (conducted specifically for this study) were used to collect information on visitor expenditures in South Carolina. Spending from visitors arriving on a commercial airline flight are applicable only to the six commercial airports.

Sales tax rates are different, depending upon the expenditure category: lodging, food, rental car, retail, or entertainment. Sales tax revenues collected in association with visitor spending provide a significant annual benefit to the state and local communities in South Carolina. The calculation of sales tax revenues associated with visitor spending is represented by the following formula:

$$\text{Sales Taxes} = (\text{Visitor Expenditure by Category} \times \text{Sales Tax Rate}) / (1 + \text{Sales Tax Rate})$$

#### Example for Columbia Metropolitan Airport (CAE)

*\$235 million in Direct Taxable Spending from Commercial Service & General Aviation Visitors Generates:*

*\$843,000 (State Sales Tax + County Sales Tax) from Entertainment Spending*

*+*

*\$855,000 (State Sales Tax + County Sales Tax) from Retail Spending*

*+*

*\$3.1 million (State Sales Tax + County Sales Tax + Hospitality Tax) from Restaurant Spending*

*+*

*\$2.2 million (State Sales Tax + County Sales Tax + Rental Car Tax) from Rental Car Spending*

*+*

*\$7.8 million (State Sales Tax + County Sales Tax + Accommodations Tax) from Lodging Spending*

*=*

***\$14.8 million in Total Annual Sales Tax Related to Direct Spending from Visitors Arriving on Commercial Airlines and General Aviation Aircraft***

When all expenditure categories for both commercial service and general aviation visitors are considered, this study estimated a total of over \$4.3 billion in direct visitor spending. A portion of every visitor expenditure is subject to various taxes (sales, local option, city, hospitality, and accommodations) depending on the expenditure category (lodging, food, retail, entertainment, transportation). The sales tax revenue generated by both commercial service and general aviation visitors spending were determined by expenditure category for each airport. This was accomplished by identifying direct visitor spending by category by airport and then applying the applicable sales tax rate. **Table 7**, **Table 9**, and **Table 10** presented information on direct visitor spending used to develop tax revenue estimates for this category.

Statewide sales tax revenues from direct spending from commercial and general aviation visitors are presented in **Table 26**. Annually, this study estimated that spending by commercial and general aviation visitors results in approximately \$269.6 million in annual statewide sales tax revenues.

### 7.3.5 Sales Tax Generated in Association with Direct Payroll of Airport and Airport Supported Employees

The U.S. Department of Labor's Bureau of Labor and Statistics (BLS) estimates that between 25 and 35 percent of the average South Carolina employee's income is spent on items subject to sales tax. To remain conservative, this analysis used the effective rate of 25%. As part of this study, direct jobs and associated direct annual payroll were both estimated for airport management, airport tenants, jobs supported by capital spending, and jobs supported by visitor spending.

Using the assumption that 25% of income is spent on taxable items, sales tax paid by all employees whose job is directly supported by airport management, an airport tenant, airport/tenant related capital improvement investment, and/or visitor spending was calculated. The generalized formulas used to determine estimated sales tax paid in association with payroll related to airport/airport supported employees included:

$$\text{Average Income} = \text{Direct Payroll} / \text{Number of Direct Employees}$$

$$\text{Sales Taxes Paid per Employee per Average Income} = 25\% \text{ of Average Employee Income}$$

$$\text{Sales Taxes per Airport} = \text{Sales Tax Paid per Employee} \times \text{Number of Direct Employees}$$

#### Example for Columbia Metropolitan Airport (CAE)

*\$118.7 million in Direct Payroll from 4,454 Direct Airport and Airport Supported Employees Generates:*

*\$52,000 in sales taxes generated by airport management employees*

*(\$3.4 million in payroll ÷ 65 jobs = (\$53,000 average salary x 25% x (State Sales Tax + County Sales Tax + City Sales Tax) x 65 jobs))*

*+*

*\$492,000 in sales taxes generated by tenant employees*

*(\$32.7 million in payroll ÷ 737 jobs = (\$45,000 average salary x 25% x (State Sales Tax + County Sales Tax + City Sales Tax) x 737 jobs))*

*+*

*\$39,000 in sales taxes generated by construction-related employees*

*(\$2.6 million in payroll ÷ 56 jobs = (\$46,000 average salary x 25% x (State Sales Tax + County Sales Tax + City Sales Tax) x 56 jobs))*

*+*

*\$1.1 million in sales taxes generated by commercial visitor-related employees*

*(\$74.8 million in payroll ÷ 3,362 jobs = (\$22,000 average salary x 25% x (State Sales Tax + County Sales Tax + City Sales Tax) x 3,362 jobs))*

*+*

*\$77,000 in sales taxes generated by general aviation visitor-related employees*

*(\$5.1 million in payroll ÷ 234 jobs = (\$22,000 average salary x 25% x (State Sales Tax + County Sales Tax + City Sales Tax) x 234 jobs))*

*=*

***\$1.78 million in Total Annual Sales Tax Related to Spending by Airport Supported Employees***

Estimates of sales tax revenues in this category were built for every South Carolina airport, based on average income per employee. When all impact categories are considered (airport management, tenant, capital investment, commercial service visitor spending, and general aviation visitor spending), this study estimated that statewide a total of 78,013 direct jobs are supported in all categories and that these jobs have an associated annual direct payroll of over \$3.0 billion. An average payroll (earnings) per employee was calculated for each airport by impact category, then the 25% effective sales tax rate was applied to develop an estimate



of employee related sales tax revenues. **Table 1, Table 2, Table 4, Table 5, Table 7, Table 9, and Table 10** presented information on direct employment and direct payroll used to develop sales tax revenue estimates for this category.

Statewide sales tax revenues associated with direct spending from airport and airport supported employees are presented in **Table 26**. Annual sales tax revenues in this category are estimated at approximately \$45.2 million. As noted this estimated is based on total statewide direct annual payroll of about \$3.0 billion.

### 7.3.6 State Income Tax Generated in Association with the Payroll of Direct Airport and Direct Airport Supported Employees

Using current South Carolina Income Tax Brackets, state income taxes paid by all employees whose job is directly support by an airport (management or tenant) or an airport supported activity (construction/visitor spending) were estimated. Using the following formula generated the estimate for state income tax revenue:

$$\text{Average Income} = \text{Direct Payroll} / \text{Number of Direct Employees}$$

$$\text{Average State Income Tax Paid per Employee per Average Income} = \text{Look Up Current South Carolina Income Tax Rates}$$

$$\text{State Income Taxes Paid per Airport} = \text{State Income Tax Paid per Employee} \times \text{Number of Direct Employees}$$

#### Example for Columbia Metropolitan Airport (CAE)

**\$118.7 million in Direct Payroll from 4,454 Direct Airport and Airport Supported Employees Generates:**

*\$241,000 in income taxes generated by airport management employees*

*(\$3.4 million in payroll ÷ 65 jobs = \$53,000 average salary x 7% x 65 jobs)*

+

*\$2.9 million in income taxes generated by tenant employees*

*(\$32.7 million in payroll ÷ 737 jobs = \$45,000 average salary x 7% x 737 jobs)*

+

*\$181,000 in income taxes generated by construction-related employees*

*(\$2.6 million in payroll ÷ 56 jobs = \$46,000 average salary x 7% x 56 jobs)*

+

*\$5.2 million in income taxes generated by commercial visitor-related employees*

*(\$74.8 million in payroll ÷ 3,362 jobs = \$22,000 average salary x 7% x 3,362 jobs)*

+

*\$357,000 in income taxes generated by general aviation visitor-related employees*

*(\$5.1 million in payroll ÷ 234 jobs = \$22,000 average salary x 7% x 234 jobs)*

=

**\$8.3 million in Total Annual Income Tax Related to Direct Payroll for Airport Supported Employees**

Estimates of state income tax were developed for each South Carolina airport based on average income per direct airport employee or airport supported employee. Average income was determined by dividing direct employees in each impact category by direct payroll.

An average income tax rate was developed, based on the average income, for each airport/airport supported employee. The methodology for determining average state income tax paid per employee, using current South Carolina income tax rates, was based on the 2016-2017 tax year. South Carolina does not differentiate between filing statuses such as single filer, married filing jointly, or head of household



When all impact categories are considered (airport management, tenant, capital investment, commercial service visitor spending, and general aviation visitor spending), this study estimated that statewide a total of 78,016 direct jobs are supported with an associated payroll of over \$3.0 billion. All employee earnings are subject to the applicable state income tax per current (2017) income tax rate brackets, the highest of which is 7% for income of \$14,550 and above. The average income per employee for all impact categories at all airports exceeds \$14,550. Therefore, a 7% tax rate was applied to each average income figure for all airports by impact category to determine employee related income tax revenues. **Table 1, Table 2, Table 4, Table 5, Table 7, Table 9, Table 10, and Table 11** presented information on direct employment and direct payroll used to develop tax revenue estimates for this category.

Statewide income tax revenues associated with the payroll of employees whose jobs are supported directly by the airports or by airport associated activities are presented in **Table 26**. Annual state income tax revenues in this category were estimated at \$211 million in this analysis. This state income tax revenue estimate is based on total direct annual statewide payroll of approximately \$3.0 billion.

## 7.4 Summary of Statewide Sales and Income Tax Revenues from South Carolina Airports

**Table 26** provides a summary of statewide sales tax and income tax revenues by category.

TABLE 26 – ESTIMATED SOUTH CAROLINA STATEWIDE SALES TAX REVENUES FROM DIRECT AIRPORT AND AIRPORT-SUPPORTED ACTIVITIES

Source	Estimated Tax
<b>Sales Tax Airport Management</b>	\$2,609,220
<b>Sales Tax Airport Tenants</b>	\$112,157,620
<b>Sales Tax Airport and Tenant Capital Investment</b>	\$16,003,350
<b>Commercial Service Visitor Sales Tax</b>	\$254,831,300
<b>General Aviation Visitor Sales Tax</b>	\$14,824,150
<b>Employee Sales Taxes</b>	
– Airport Employees	\$502,090
– Airport Tenant Employees	\$18,549,240
– Employees Supporting Capital Spending	\$1,096,360
– Employees Supporting Commercial Visitors	\$23,808,850
– Employees Supporting General Aviation Visitors	\$1,316,320
<b>Subtotal</b>	<b>\$45,272,860</b>
<b>State Income Tax</b>	
– Airport Employees	\$2,343,010
– Airport Tenant Employees	\$86,563,120
– Employees Supporting Capital Spending	\$5,116,500
– Employees Supporting Commercial Visitors	\$111,107,940
– Employees Supporting General Aviation Visitors	\$6,142,930
<b>Subtotal</b>	<b>\$211,273,500</b>
<b>All Taxes</b>	<b>\$656,972,000</b>

Source: Jviation

**Table 27 – Sales Taxes Generated by Activity at South Carolina Commercial Service and General Aviation Airports** summarizes estimates of sales tax and income tax revenues attributable to South Carolina’s commercial service and general aviation airports.

TABLE 27 – SALES TAXES GENERATED BY ACTIVITY AT SOUTH CAROLINA COMMERCIAL SERVICE AND GENERAL AVIATION AIRPORTS

Sales Taxes Generated by:	Airports		
	Commercial	General Aviation	All Airports
Airport Management	\$2,164,490	\$444,730	\$2,609,220
Airport Tenants	\$95,248,470	\$16,909,150	\$112,157,620
Airport & Tenant Capital Investment	\$13,643,240	\$2,360,110	\$16,003,350
Commercial Service Visitors	\$254,831,300	\$0	\$254,831,300
General Aviation Visitors	\$8,778,860	\$6,045,290	\$14,824,150
Airport, Tenant, CIP, & Visitor Employees	\$42,876,380	\$2,396,480	\$45,272,860
<b>Total</b>	<b>\$417,542,740</b>	<b>\$28,155,760</b>	<b>\$445,698,500</b>
<b>Percent</b>	<b>94%</b>	<b>6%</b>	<b>100%</b>

Source: Jviation

Similar to **Table 27**, **Table 28 – State Income Taxes Generated by Activity at South Carolina Commercial Service and General Aviation Airports** shows the portion of state income tax revenues that are attributable to the commercial and the general aviation airports.

TABLE 28 – STATE INCOME TAXES GENERATED BY ACTIVITY AT SOUTH CAROLINA COMMERCIAL SERVICE AND GENERAL AVIATION AIRPORTS

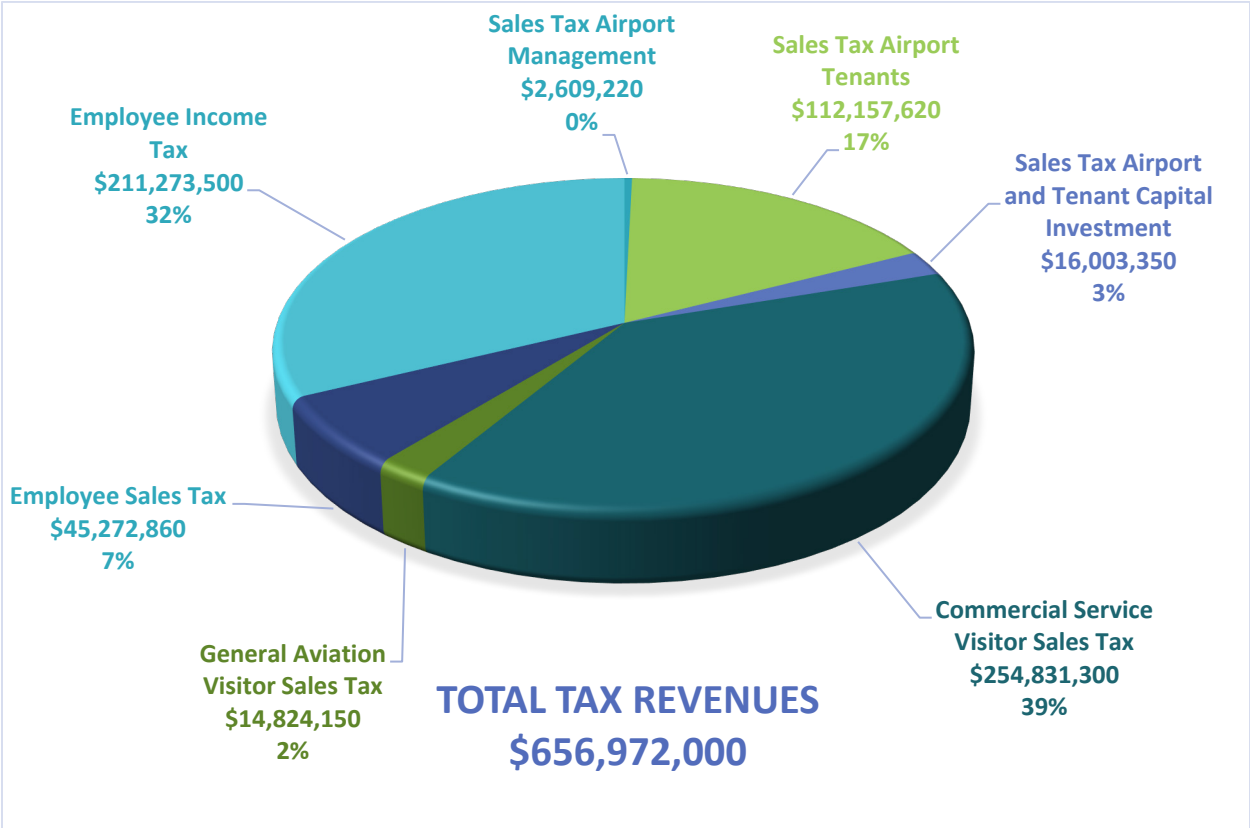
State Income Taxes Generated by:	Airports		
	Commercial	General Aviation	All Airports
Airport Employees	\$1,962,180	\$380,830	\$2,343,010
Airport Tenant Employees	\$79,099,160	\$7,463,960	\$86,563,120
Employees Supporting Capital Spending	\$4,282,660	\$833,840	\$5,116,500
Employees Supporting Commercial Visitors	\$111,107,940	\$0	\$111,107,940
Employees Supporting General Aviation Visitors	\$3,637,850	\$2,505,080	\$6,142,930
<b>Total</b>	<b>\$200,089,790</b>	<b>\$11,183,710</b>	<b>\$211,273,500</b>
<b>Percent</b>	<b>95%</b>	<b>5%</b>	<b>100%</b>

Source: Jviation

**Figure 5 – Contributions to Airport and Airport Supported Sales Tax and Income Tax Revenues** shows the relative contribution of each type of taxable transaction to overall statewide tax revenues associated with airports and airport supported activity. Statewide, this study estimated that when all tax revenue contributors are considered, state and local governments realize nearly \$657 million in annual tax revenues from airport and airport supported activities. The largest contributors to state and local tax revenues are sales taxes paid by commercial service visitors (39% and \$254.8 million) and income taxes paid by airport and airport supported

employees (32% and \$211.3 million). These two contributors account for 71% of all tax revenues estimated in this analysis.

FIGURE 5 – CONTRIBUTIONS TO AIRPORT AND AIRPORT SUPPORTED SALES TAX AND INCOME TAX REVENUES



Source: Jviation

### 7.5 Sales and Income Tax Revenues Associated with each of the 57 South Carolina Airports

**Table 29, Table 30, Table 31, and Table 32** detail estimated state and local sales and income tax revenues associated with each of South Carolina’s 57 public airports. While these tables provide information on individual tax revenue sources, **Table 32** provides a summary of all tax revenues that are generated directly by the 57 study airports and the activities they support.

This analysis, focused on sales taxes, state income taxes, and state property taxes collected in connection with the 57 study airports, estimated total annual tax revenues to be nearly \$657 million. South Carolina, its counties, and municipalities each benefit from tax revenues that stem from the airports and the activities they support. It is worth noting that this annual tax revenue estimate does include direct economic impacts for Boeing as they were identified separately in this study.

TABLE 29 – ESTIMATED DIRECT STATE AND LOCAL SALES TAXES PAID BY AIRPORT MANAGEMENT, TENANTS, CONSTRUCTION, AND VISITOR ACTIVITY

FAA ID	City	Airport Name	On-Airport Activity			Visitor Spending Activity	
			Management	Tenants	Construction Spending	Commercial	General Aviation
CHS	Charleston	Charleston International Airport	\$628,360	\$80,340,470	\$9,761,650	\$141,942,650	\$3,946,270
CAE	Columbia	Columbia Metropolitan Airport	\$326,130	\$5,186,470	\$510,430	\$13,842,930	\$977,930
FLO	Florence	Florence Regional Airport	\$125,820	\$477,990	\$167,950	\$559,020	\$84,830
GSP	Greer	Greenville-Spartanburg International (Roger Milliken Field)	\$537,740	\$4,212,570	\$1,109,190	\$25,945,870	\$633,270
HXD	Hilton Head Island	Hilton Head Airport	\$31,700	\$550,960	\$287,310	\$2,180,320	\$1,401,600
MYR	Myrtle Beach	Myrtle Beach International Airport	\$514,740	\$4,480,010	\$1,806,710	\$70,360,510	\$1,734,960
		<b>Total Commercial Airports Tax Contribution</b>	<b>\$2,164,490</b>	<b>\$95,248,470</b>	<b>\$13,643,240</b>	<b>\$254,831,300</b>	<b>\$8,778,860</b>
AIK	Aiken	Aiken Regional Airport	\$5,350	\$477,250	\$44,760	\$0	\$275,500
AQX	Allendale	Allendale County Airport	\$2,660	\$22,780	\$1,320	\$0	\$24,680
AND	Anderson	Anderson Regional Airport	\$64,600	\$40,840	\$84,890	\$0	\$158,740
PHH	Andrews	Robert F. Swinnie Airport	\$2,630	\$8,870	\$8,510	\$0	\$3,120
99N	Bamberg	Bamberg County Airport	\$770	\$0	\$3,220	\$0	\$1,590
BNL	Barnwell	Barnwell Regional Airport	\$3,310	\$0	\$10,870	\$0	\$23,720
ARW	Beaufort	Beaufort County Airport	\$7,360	\$36,320	\$14,210	\$0	\$253,130
BBP	Bennettsville	Marlboro County Airport - HE Avent Field	\$3,040	\$11,930	\$14,220	\$0	\$8,540
52J	Bishopville	Lee County Airport-Butters Field	\$770	\$2,830	\$15,550	\$0	\$2,120
CDN	Camden	Woodward Field	\$7,160	\$100,330	\$53,380	\$0	\$29,040
JZI	Charleston	Charleston Executive Airport	\$17,010	\$301,000	\$120,010	\$0	\$1,139,450
CQW	Cheraw	Cheraw Municipal/Lynch Bellinger Field	\$770	\$20,520	\$24,890	\$0	\$12,410
DCM	Chester	Chester Catawba Regional Airport	\$3,040	\$96,820	\$18,020	\$0	\$22,220
CEU	Clemson	Oconee County Regional Airport	\$21,580	\$24,130	\$34,120	\$0	\$196,520
CUB	Columbia	Jim Hamilton - LB Owens Airport	\$17,530	\$214,040	\$99,600	\$0	\$164,060

TABLE 29 – ESTIMATED DIRECT STATE AND LOCAL SALES TAXES PAID BY AIRPORT MANAGEMENT, TENANTS, CONSTRUCTION, AND VISITOR ACTIVITY

FAA ID	City	Airport Name	On-Airport Activity			Visitor Spending Activity	
			Management	Tenants	Construction Spending	Commercial	General Aviation
HYW	Conway	Conway-Horry County Airport	\$9,540	\$124,450	\$16,450	\$0	\$87,790
UDG	Darlington	Darlington County Airport	\$8,370	\$47,760	\$29,820	\$0	\$33,450
DLC	Dillon	Dillon County Airport	\$1,520	\$0	\$0	\$0	\$1,180
GGE	Georgetown	Georgetown County Airport	\$9,990	\$90,680	\$59,900	\$0	\$382,040
GMU	Greenville	Greenville Downtown Airport	\$18,550	\$1,017,010	\$56,790	\$0	\$349,010
GYH	Greenville	Donaldson Field	\$18,730	\$11,760,440	\$138,530	\$0	\$139,200
GRD	Greenwood	Greenwood County Airport	\$3,960	\$91,170	\$32,410	\$0	\$61,320
3J0	Hampton	Hampton County Airport	\$3,040	\$76,420	\$3,340	\$0	\$1,320
HVS	Hartsville	Hartsville Regional Airport	\$4,830	\$17,050	\$22,920	\$0	\$21,760
CKI	Kingsree	Williamsburg Regional Airport	\$1,990	\$59,230	\$29,720	\$0	\$11,330
51J	Lake City	Lake City Municipal Airport CJ Evans Field	\$590	\$0	\$770	\$0	\$1,230
LKR	Lancaster	Lancaster County-McWhirter Field	\$10,620	\$9,070	\$65,760	\$0	\$53,130
LUX	Laurens	Laurens County Airport	\$1,270	\$4,970	\$40,760	\$0	\$9,610
5J9	Loris	Twin City Airport	\$1,250	\$0	\$800	\$0	\$2,720
MNI	Manning	Santee Cooper Regional Airport	\$3,040	\$41,160	\$11,670	\$0	\$10,770
MAO	Marion	Marion County Airport	\$1,520	\$82,540	\$10,730	\$0	\$5,990
S19	McCormick	McCormick County Airport	\$670	\$0	\$0	\$0	\$800
MKS	Moncks Corner	Berkeley County Airport	\$4,990	\$31,370	\$89,250	\$0	\$65,280
LRO	Mount Pleasant	Mt Pleasant Regional-Faison Field	\$11,720	\$27,190	\$53,770	\$0	\$156,190
EOE	Newberry	Newberry County Airport	\$3,270	\$4,890	\$132,200	\$0	\$22,760
CRE	North Myrtle Beach	Grand Strand Airport	\$18,330	\$128,550	\$67,190	\$0	\$967,100
OGB	Orangeburg	Orangeburg Municipal Airport	\$8,500	\$26,140	\$19,220	\$0	\$88,200
PYG	Pageland	Pageland Airport	\$1,140	\$0	\$16,240	\$0	\$4,640

TABLE 29 – ESTIMATED DIRECT STATE AND LOCAL SALES TAXES PAID BY AIRPORT MANAGEMENT, TENANTS, CONSTRUCTION, AND VISITOR ACTIVITY

FAA ID	City	Airport Name	On-Airport Activity			Visitor Spending Activity	
			Management	Tenants	Construction Spending	Commercial	General Aviation
6J0	Pelion	Lexington County Airport	\$4,830	\$0	\$45,740	\$0	\$4,980
LQK	Pickens	Pickens County Airport	\$12,380	\$24,330	\$45,510	\$0	\$97,710
3J1	Ridgeland	Ridgeland-Claude Dean Airport	\$3,620	\$53,830	\$204,100	\$0	\$8,460
UZA	Rock Hill	Rock Hill/York Co/Bryant Field	\$13,900	\$820,090	\$87,330	\$0	\$214,320
6J4	Saluda	Saluda County Airport	\$1,100	\$5,800	\$10,320	\$0	\$2,220
SPA	Spartanburg	Spartanburg Downtown Memorial Airport	\$69,890	\$383,660	\$275,840	\$0	\$236,260
6J2	St George	St. George Airport	\$1,160	\$0	\$3,630	\$0	\$2,650
DYB	Summerville	Summerville Airport	\$4,970	\$39,610	\$46,380	\$0	\$63,300
SMS	Sumter	Sumter Airport	\$10,380	\$259,310	\$107,520	\$0	\$108,200
6J6	Trenton	Edgefield County Airport	\$730	\$1,090	\$0	\$0	\$1,450
35A	Union	Union County, Troy Shelton Field	\$3,820	\$16,990	\$6,680	\$0	\$6,490
RBW	Walterboro	Lowcountry Regional Airport	\$9,180	\$236,120	\$31,290	\$0	\$492,230
FDW	Winnsboro	Fairfield County Airport	\$3,760	\$70,570	\$49,960	\$0	\$15,360
		<b>Total General Aviation Tax Contribution</b>	<b>\$444,730</b>	<b>\$16,909,150</b>	<b>\$2,360,110</b>	<b>\$0</b>	<b>\$6,045,290</b>
		<b>All Airports Tax Contribution</b>	<b>\$2,609,220</b>	<b>\$112,157,620</b>	<b>\$16,003,350</b>	<b>\$254,831,300</b>	<b>\$14,824,150</b>

Source: Jviation

TABLE 30 – ESTIMATED DIRECT STATE AND LOCAL SALES TAXES PAID BY EMPLOYEES ASSOCIATED WITH AIRPORTS AND AIRPORT-SUPPORTED ACTIVITIES

FAA ID	City	Airport Name	On-Airport Employees			Visitor Supported Employees	
			Management	Tenants	Construction Spending	Commercial	General Aviation
CHS	Charleston	Charleston International Airport	\$152,340	\$15,490,860	\$622,520	\$13,777,570	\$369,870
CAE	Columbia	Columbia Metropolitan Airport	\$51,630	\$491,550	\$38,840	\$1,122,270	\$76,580
FLO	Florence	Florence Regional Airport	\$10,460	\$54,920	\$10,250	\$40,410	\$6,160
GSP	Greer	Greenville-Spartanburg International (Roger Milliken Field)	\$113,920	\$460,660	\$103,120	\$2,179,310	\$51,790
HXD	Hilton Head Island	Hilton Head Airport	\$9,000	\$56,260	\$26,060	\$203,920	\$125,080
MYR	Myrtle Beach	Myrtle Beach International Airport	\$83,120	\$395,570	\$116,920	\$6,485,370	\$150,050
		<b>Total Commercial Airports Tax Contribution</b>	<b>\$420,470</b>	<b>\$16,949,820</b>	<b>\$917,710</b>	<b>\$23,808,850</b>	<b>\$779,530</b>
AIK	Aiken	Aiken Regional Airport	\$900	\$20,610	\$3,010	\$0	\$19,380
AQX	Allendale	Allendale County Airport	\$1,200	\$1,650	\$0	\$0	\$2,160
AND	Anderson	Anderson Regional Airport	\$6,300	\$9,530	\$6,800	\$0	\$13,600
PHH	Andrews	Robert F. Swinnie Airport	\$450	\$680	\$630	\$0	\$280
99N	Bamberg	Bamberg County Airport	\$410	\$0	\$0	\$0	\$0
BNL	Barnwell	Barnwell Regional Airport	\$1,800	\$0	\$830	\$0	\$2,070
ARW	Beaufort	Beaufort County Airport	\$2,400	\$7,800	\$1,290	\$0	\$24,070
BBP	Bennettsville	Marlboro County Airport - HE Avent Field	\$300	\$550	\$940	\$0	\$750
52J	Bishopville	Lee County Airport-Butters Field	\$410	\$780	\$1,030	\$0	\$0
CDN	Camden	Woodward Field	\$750	\$12,960	\$4,060	\$0	\$2,390
JZI	Charleston	Charleston Executive Airport	\$2,400	\$20,740	\$7,750	\$0	\$107,590
CQW	Cheraw	Cheraw Municipal/Lynch Bellinger Field	\$300	\$1,640	\$1,650	\$0	\$1,090
DCM	Chester	Chester Catawba Regional Airport	\$1,500	\$9,210	\$1,190	\$0	\$1,940
CEU	Clemson	Oconee County Regional Airport	\$3,760	\$7,290	\$3,050	\$0	\$17,140
CUB	Columbia	Jim Hamilton - LB Owens Airport	\$2,330	\$11,780	\$6,610	\$0	\$13,450
HYW	Conway	Conway-Horry County Airport	\$1,020	\$16,050	\$1,220	\$0	\$7,190



TABLE 30 – ESTIMATED DIRECT STATE AND LOCAL SALES TAXES PAID BY EMPLOYEES ASSOCIATED WITH AIRPORTS AND AIRPORT-SUPPORTED ACTIVITIES

FAA ID	City	Airport Name	On-Airport Employees			Visitor Supported Employees	
			Management	Tenants	Construction Spending	Commercial	General Aviation
UDG	Darlington	Darlington County Airport	\$900	\$9,750	\$1,820	\$0	\$2,420
DLC	Dillon	Dillon County Airport	\$300	\$0	\$0	\$0	\$0
GGE	Georgetown	Georgetown County Airport	\$2,400	\$4,800	\$4,450	\$0	\$34,540
GMU	Greenville	Greenville Downtown Airport	\$5,140	\$180,890	\$5,350	\$0	\$29,910
GYH	Greenville	Donaldson Field	\$6,660	\$1,023,440	\$13,040	\$0	\$11,930
GRD	Greenwood	Greenwood County Airport	\$1,200	\$8,280	\$2,890	\$0	\$5,350
3J0	Hampton	Hampton County Airport	\$1,500	\$10,050	\$0	\$0	\$0
HVS	Hartsville	Hartsville Regional Airport	\$750	\$790	\$1,400	\$0	\$1,580
CKI	Kingstree	Williamsburg Regional Airport	\$300	\$4,300	\$2,260	\$0	\$990
51J	Lake City	Lake City Municipal Airport CJ Evans Field	\$0	\$0	\$0	\$0	\$0
LKR	Lancaster	Lancaster County-McWhirter Field	\$1,200	\$820	\$4,360	\$0	\$4,640
LUX	Laurens	Laurens County Airport	\$1,650	\$510	\$3,270	\$0	\$830
5J9	Loris	Twin City Airport	\$300	\$0	\$0	\$0	\$240
MNI	Manning	Santee Cooper Regional Airport	\$300	\$1,900	\$770	\$0	\$940
MAO	Marion	Marion County Airport	\$1,200	\$10,850	\$710	\$0	\$520
S19	McCormick	McCormick County Airport	\$380	\$0	\$0	\$0	\$0
MKS	Moncks Corner	Berkeley County Airport	\$2,400	\$2,930	\$7,020	\$0	\$6,130
LRO	Mount Pleasant	Mt Pleasant Regional-Faison Field	\$2,400	\$3,380	\$3,470	\$0	\$14,750
EOE	Newberry	Newberry County Airport	\$750	\$1,070	\$10,040	\$0	\$1,990
CRE	North Myrtle Beach	Grand Strand Airport	\$4,800	\$16,370	\$5,000	\$0	\$87,420
OGB	Orangeburg	Orangeburg Municipal Airport	\$1,950	\$2,700	\$1,460	\$0	\$7,700
PYG	Pageland	Pageland Airport	\$300	\$0	\$1,080	\$0	\$400
6J0	Pelion	Lexington County Airport	\$300	\$0	\$3,480	\$0	\$410

TABLE 30 – ESTIMATED DIRECT STATE AND LOCAL SALES TAXES PAID BY EMPLOYEES ASSOCIATED WITH AIRPORTS AND AIRPORT-SUPPORTED ACTIVITIES

FAA ID	City	Airport Name	On-Airport Employees			Visitor Supported Employees	
			Management	Tenants	Construction Spending	Commercial	General Aviation
LQK	Pickens	Pickens County Airport	\$2,700	\$3,960	\$3,650	\$0	\$8,370
3J1	Ridgeland	Ridgeland-Claude Dean Airport	\$750	\$4,560	\$13,750	\$0	\$780
UZA	Rock Hill	Rock Hill/York Co/Bryant Field	\$1,800	\$60,480	\$6,630	\$0	\$18,700
6J4	Saluda	Saluda County Airport	\$300	\$300	\$780	\$0	\$180
SPA	Spartanburg	Spartanburg Downtown Memorial Airport	\$4,200	\$64,320	\$24,660	\$0	\$22,510
6J2	St George	St. George Airport	\$310	\$0	\$0	\$0	\$250
DYB	Summerville	Summerville Airport	\$1,800	\$2,760	\$3,650	\$0	\$5,950
SMS	Sumter	Sumter Airport	\$600	\$32,560	\$7,130	\$0	\$9,440
6J6	Trenton	Edgefield County Airport	\$300	\$0	\$0	\$0	\$0
35A	Union	Union County, Troy Shelton Field	\$1,950	\$1,740	\$600	\$0	\$620
RBW	Walterboro	Lowcountry Regional Airport	\$2,700	\$20,090	\$2,070	\$0	\$42,940
FDW	Winnsboro	Fairfield County Airport	\$900	\$4,550	\$3,800	\$0	\$1,260
		<b>Total General Aviation Tax Contribution</b>	<b>\$81,620</b>	<b>\$1,599,420</b>	<b>\$178,650</b>	<b>\$0</b>	<b>\$536,790</b>
		<b>All Airports Tax Contribution</b>	<b>\$502,090</b>	<b>\$18,549,240</b>	<b>\$1,096,360</b>	<b>\$23,808,850</b>	<b>\$1,316,320</b>

Source: Jviation

TABLE 31 – ESTIMATED STATE INCOME TAXES PAID BY EMPLOYEES ASSOCIATED WITH AIRPORTS AND AIRPORT-SUPPORTED ACTIVITIES

FAA ID	City	Airport Name	On-Airport Employees			Visitor Supported Employees	
			Management	Tenants	Construction Spending	Commercial	General Aviation
CHS	Charleston	Charleston International Airport	\$710,920	\$72,290,670	\$2,905,100	\$64,295,320	\$1,726,080
CAE	Columbia	Columbia Metropolitan Airport	\$240,940	\$2,293,900	\$181,270	\$5,237,260	\$357,390
FLO	Florence	Florence Regional Airport	\$48,810	\$256,300	\$47,840	\$188,570	\$28,770
GSP	Greer	Greenville-Spartanburg International (Roger Milliken Field)	\$531,640	\$2,149,740	\$481,220	\$10,170,120	\$241,700
HXD	Hilton Head Island	Hilton Head Airport	\$42,000	\$262,550	\$121,620	\$951,630	\$583,680
MYR	Myrtle Beach	Myrtle Beach International Airport	\$387,870	\$1,846,000	\$545,610	\$30,265,040	\$700,230
		<b>Total Commercial Airports Tax Contribution</b>	<b>\$1,962,180</b>	<b>\$79,099,160</b>	<b>\$4,282,660</b>	<b>\$111,107,940</b>	<b>\$3,637,850</b>
AIK	Aiken	Aiken Regional Airport	\$4,200	\$96,190	\$14,070	\$0	\$90,420
AQX	Allendale	Allendale County Airport	\$5,600	\$7,720	\$0	\$0	\$10,070
AND	Anderson	Anderson Regional Airport	\$29,400	\$44,470	\$31,740	\$0	\$63,470
PHH	Andrews	Robert F. Swinnie Airport	\$2,100	\$3,190	\$2,950	\$0	\$1,310
99N	Bamberg	Bamberg County Airport	\$1,930	\$0	\$0	\$0	\$0
BNL	Barnwell	Barnwell Regional Airport	\$8,400	\$0	\$3,850	\$0	\$9,650
ARW	Beaufort	Beaufort County Airport	\$11,200	\$36,380	\$6,020	\$0	\$112,320
BBP	Bennettsville	Marlboro County Airport - HE Avent Field	\$1,400	\$2,570	\$4,400	\$0	\$3,480
52J	Bishopville	Lee County Airport-Butters Field	\$1,890	\$3,640	\$4,810	\$0	\$0
CDN	Camden	Woodward Field	\$3,500	\$60,480	\$18,960	\$0	\$11,160
JZI	Charleston	Charleston Executive Airport	\$11,200	\$96,790	\$36,170	\$0	\$502,090
CQW	Cheraw	Cheraw Municipal/Lynch Bellinger Field	\$1,400	\$7,630	\$7,700	\$0	\$5,060
DCM	Chester	Chester Catawba Regional Airport	\$7,000	\$42,980	\$5,570	\$0	\$9,070
CEU	Clemson	Oconee County Regional Airport	\$17,520	\$34,030	\$14,210	\$0	\$80,010
CUB	Columbia	Jim Hamilton - LB Owens Airport	\$10,850	\$54,990	\$30,870	\$0	\$62,790
HYW	Conway	Conway-Horry County Airport	\$4,750	\$74,920	\$5,710	\$0	\$33,570
UDG	Darlington	Darlington County Airport	\$4,200	\$45,500	\$8,500	\$0	\$11,310

TABLE 31 – ESTIMATED STATE INCOME TAXES PAID BY EMPLOYEES ASSOCIATED WITH AIRPORTS AND AIRPORT-SUPPORTED ACTIVITIES

FAA ID	City	Airport Name	On-Airport Employees			Visitor Supported Employees	
			Management	Tenants	Construction Spending	Commercial	General Aviation
DLC	Dillon	Dillon County Airport	\$1,400	\$0	\$0	\$0	\$0
GGE	Georgetown	Georgetown County Airport	\$11,200	\$22,400	\$20,780	\$0	\$161,170
GMU	Greenville	Greenville Downtown Airport	\$24,000	\$844,160	\$24,950	\$0	\$139,560
GYH	Greenville	Donaldson Field	\$31,080	\$4,776,060	\$60,870	\$0	\$55,670
GRD	Greenwood	Greenwood County Airport	\$5,600	\$38,640	\$13,500	\$0	\$24,970
3J0	Hampton	Hampton County Airport	\$7,000	\$46,900	\$0	\$0	\$0
HVS	Hartsville	Hartsville Regional Airport	\$3,520	\$3,680	\$6,530	\$0	\$7,360
CKI	Kingstree	Williamsburg Regional Airport	\$1,400	\$20,060	\$10,540	\$0	\$4,610
51J	Lake City	Lake City Municipal Airport CJ Evans Field	\$0	\$0	\$0	\$0	\$0
LKR	Lancaster	Lancaster County-McWhirter Field	\$5,600	\$3,820	\$20,340	\$0	\$21,630
LUX	Laurens	Laurens County Airport	\$7,700	\$2,400	\$15,240	\$0	\$3,850
5J9	Loris	Twin City Airport	\$1,400	\$0	\$0	\$0	\$1,140
MNI	Manning	Santee Cooper Regional Airport	\$1,400	\$8,870	\$3,610	\$0	\$4,400
MAO	Marion	Marion County Airport	\$5,600	\$50,650	\$3,320	\$0	\$2,450
S19	McCormick	McCormick County Airport	\$1,760	\$0	\$0	\$0	\$0
MKS	Moncks Corner	Berkeley County Airport	\$11,200	\$13,650	\$32,760	\$0	\$28,610
LRO	Mount Pleasant	Mt Pleasant Regional-Faison Field	\$11,200	\$15,750	\$16,210	\$0	\$68,830
EOE	Newberry	Newberry County Airport	\$3,500	\$4,990	\$46,870	\$0	\$9,290
CRE	North Myrtle Beach	Grand Strand Airport	\$22,400	\$76,370	\$23,310	\$0	\$407,980
OGB	Orangeburg	Orangeburg Municipal Airport	\$9,100	\$12,600	\$6,820	\$0	\$35,910
PYG	Pageland	Pageland Airport	\$1,400	\$0	\$5,020	\$0	\$1,890
6J0	Pelion	Lexington County Airport	\$1,400	\$0	\$16,240	\$0	\$1,910
LQK	Pickens	Pickens County Airport	\$12,600	\$18,460	\$17,020	\$0	\$39,070
3J1	Ridgeland	Ridgeland-Claude Dean Airport	\$3,500	\$21,280	\$64,170	\$0	\$3,650

TABLE 31 – ESTIMATED STATE INCOME TAXES PAID BY EMPLOYEES ASSOCIATED WITH AIRPORTS AND AIRPORT-SUPPORTED ACTIVITIES

FAA ID	City	Airport Name	On-Airport Employees			Visitor Supported Employees	
			Management	Tenants	Construction Spending	Commercial	General Aviation
UZA	Rock Hill	Rock Hill/York Co/Bryant Field	\$8,400	\$282,240	\$30,960	\$0	\$87,260
6J4	Saluda	Saluda County Airport	\$1,400	\$1,400	\$3,660	\$0	\$850
SPA	Spartanburg	Spartanburg Downtown Memorial Airport	\$19,600	\$300,170	\$115,090	\$0	\$105,050
6J2	St George	St. George Airport	\$1,430	\$0	\$0	\$0	\$1,170
DYB	Summerville	Summerville Airport	\$8,400	\$12,870	\$17,020	\$0	\$27,750
SMS	Sumter	Sumter Airport	\$2,800	\$151,940	\$33,270	\$0	\$44,050
6J6	Trenton	Edgefield County Airport	\$1,400	\$0	\$0	\$0	\$0
35A	Union	Union County, Troy Shelton Field	\$9,100	\$8,140	\$2,790	\$0	\$2,920
RBW	Walterboro	Lowcountry Regional Airport	\$12,600	\$93,750	\$9,680	\$0	\$200,400
FDW	Winnsboro	Fairfield County Airport	\$4,200	\$21,230	\$17,740	\$0	\$5,900
		<b>Total General Aviation Tax Contribution</b>	<b>\$380,830</b>	<b>\$7,463,960</b>	<b>\$833,840</b>	<b>\$0</b>	<b>\$2,505,080</b>
		<b>All Airports Tax Contribution</b>	<b>\$2,343,010</b>	<b>\$86,563,120</b>	<b>\$5,116,500</b>	<b>\$111,107,940</b>	<b>\$6,142,930</b>

Source: Jviation

TABLE 32 – SUMMARY OF SOUTH CAROLINA TAX REVENUES

FAA ID	City	Airport Name	Total Tax Revenue
CHS	Charleston	Charleston International Airport	\$408,960,650
CAE	Columbia	Columbia Metropolitan Airport	\$30,935,520
FLO	Florence	Florence Regional Airport	\$2,108,100
GSP	Greer	Greenville-Spartanburg International (Roger Milliken Field)	\$48,921,860
HXD	Hilton Head Island	Hilton Head Airport	\$6,833,690
MYR	Myrtle Beach	Myrtle Beach International Airport	\$119,872,710
<b>Total Commercial Airports Tax Contribution</b>			<b>\$617,632,530</b>
AIK	Aiken	Aiken Regional Airport	\$1,051,640
AQX	Allendale	Allendale County Airport	\$79,840
AND	Anderson	Anderson Regional Airport	\$554,380
PHH	Andrews	Robert F. Swinnie Airport	\$34,720
99N	Bamberg	Bamberg County Airport	\$7,920
BNL	Barnwell	Barnwell Regional Airport	\$64,500
ARW	Beaufort	Beaufort County Airport	\$512,500
BBP	Bennettsville	Marlboro County Airport - HE Avent Field	\$52,120
52J	Bishopville	Lee County Airport-Butters Field	\$33,830
CDN	Camden	Woodward Field	\$304,170
JZI	Charleston	Charleston Executive Airport	\$2,362,200
CQW	Cheraw	Cheraw Municipal/Lynch Bellinger Field	\$85,060
DCM	Chester	Chester Catawba Regional Airport	\$218,560
CEU	Clemson	Oconee County Regional Airport	\$453,360
CUB	Columbia	Jim Hamilton - LB Owens Airport	\$688,900
HYW	Conway	Conway-Horry County Airport	\$382,660
UDG	Darlington	Darlington County Airport	\$203,800
DLC	Dillon	Dillon County Airport	\$4,400
GGE	Georgetown	Georgetown County Airport	\$804,350
GMU	Greenville	Greenville Downtown Airport	\$2,695,320
GYH	Greenville	Donaldson Field	\$18,035,650
GRD	Greenwood	Greenwood County Airport	\$289,290
3J0	Hampton	Hampton County Airport	\$149,570
HVS	Hartsville	Hartsville Regional Airport	\$92,170
CKI	Kingstree	Williamsburg Regional Airport	\$146,730
51J	Lake City	Lake City Municipal Airport CJ Evans Field	\$2,590
LKR	Lancaster	Lancaster County-McWhirter Field	\$200,990
LUX	Laurens	Laurens County Airport	\$92,060
5J9	Loris	Twin City Airport	\$7,850

TABLE 32 – SUMMARY OF SOUTH CAROLINA TAX REVENUES

FAA ID	City	Airport Name	Total Tax Revenue
MNI	Manning	Santee Cooper Regional Airport	\$88,830
MAO	Marion	Marion County Airport	\$176,080
S19	McCormick	McCormick County Airport	\$3,610
MKS	Moncks Corner	Berkeley County Airport	\$295,590
LRO	Mount Pleasant	Mt Pleasant Regional-Faison Field	\$384,860
EOE	Newberry	Newberry County Airport	\$241,620
CRE	North Myrtle Beach	Grand Strand Airport	\$1,824,820
OGB	Orangeburg	Orangeburg Municipal Airport	\$220,300
PYG	Pageland	Pageland Airport	\$32,110
6J0	Pelion	Lexington County Airport	\$79,290
LQK	Pickens	Pickens County Airport	\$285,760
3J1	Ridgeland	Ridgeland-Claude Dean Airport	\$382,450
UZA	Rock Hill	Rock Hill/York Co/Bryant Field	\$1,632,110
6J4	Saluda	Saluda County Airport	\$28,310
SPA	Spartanburg	Spartanburg Downtown Memorial Airport	\$1,621,250
6J2	St George	St. George Airport	\$10,600
DYB	Summerville	Summerville Airport	\$234,460
SMS	Sumter	Sumter Airport	\$767,200
6J6	Trenton	Edgefield County Airport	\$4,970
35A	Union	Union County, Troy Shelton Field	\$61,840
RBW	Walterboro	Lowcountry Regional Airport	\$1,153,050
FDW	Winnsboro	Fairfield County Airport	\$199,230
Total General Aviation Tax Contribution			\$39,339,470
All Airports Tax Contribution			\$656,972,000

Source: Jviation

Notes: \*Boeing contributes approximately \$164.2 million in tax revenue

\*\*Lockheed Martin contributes approximately \$5.5 million in tax revenue



## 8.0 EFFICIENCY BENEFITS OF AVIATION

### 8.1 Jobs in South Carolina that Gain Efficiency from Aviation

Throughout the state, there are many companies and employees whose jobs benefit from aviation. By using various facets of aviation, employers and workers in South Carolina improve their efficiency. Examples of how aviation helps improve business efficiency throughout the state follow:

- **General Aviation:** There are many companies in South Carolina that own, rent, or charter general aviation aircraft. Using general aviation for business travel can reduce travel time from days to hours. Companies use general aviation to expand their market area, visit clients, stay connected with other offices, and monitor the status of ongoing projects.
- **Commercial Aviation:** Hundreds of companies in South Carolina have employees who travel on scheduled commercial airline flights to support their work assignments. Scheduled commercial airline flights enable South Carolina workers to travel to destinations throughout the United States and around the world. No other mode of travel provides similar efficiency for long distance travel.
- **Air Shipments:** Companies, both large and small, throughout the state rely on and benefit from shipments they receive and send by air. In some instances, these can be traditional air cargo shipments of heavy freight or they might be the just-in-time shipments of small parts needed for supply chain management.

Aviation is a tool that contributes to the efficiency and success of many companies in South Carolina. South Carolina jobs that gain efficiency from using aviation, identified in this section, have not been previously estimated or identified in this study. It is important to note that the jobs identified in this section are not 100% aviation dependent, but aviation helps these employees and their companies be successful.

Just some examples of non-aviation jobs that are supported in South Carolina by study airports follow:

- Patients in hospitals such as the Medical University of South Carolina in Charleston often require organ transplants. When organs become available, a physician from the hospital is flown on a charter plane to harvest organs and bring them back to South Carolina. There, a team of surgeons will complete the medical procedure. While the jobs of these physicians are not completely dependent on aviation, this example demonstrates how there are jobs in the medical profession that rely on aviation to make life saving surgery possible.
- Hundreds of companies in South Carolina such as BMW in Greer and Sonoco in Hartsville have staff that travel on a frequent basis. While the jobs of these employees are not 100% reliant on aviation, because employees can travel on commercial or general aviation aircraft, the companies improve their efficiency. Employment for companies throughout the state who have employees that use commercial or general aviation has not previously been measured or quantified in this report.
- Both Clemson University and the University of South Carolina have employees who make recruiting trips across the country. Both universities also use aviation as a method for outreach for their endowments and philanthropies. While employees who carry out these functions for both schools do not rely exclusively on aviation to support their jobs, their jobs do benefit immensely from being able to use and rely on air travel.

The IMPLAN model was used to identify jobs throughout the state that have improved efficiency because they rely on or benefit from some facet of aviation. Additional work completed as part of South Carolina's Statewide Economic Impact Study shows that there are an estimated 41,755 jobs that have improved efficiency because of aviation. These 41,755 jobs represent 1.8 % of all employment statewide. As noted, these jobs are in addition

to those previously identified in this study for airport management, airport tenants, capital investment spending, and visitor spending.

## 9.0 SUMMARY OF SOUTH CAROLINA'S ECONOMIC IMPACTS FROM AIRPORTS

The preceding sections provide information that show the economic impact of aviation in South Carolina. For all impact categories considered in this analysis, when direct, indirect, and induced impacts are considered, the 57 study airports are responsible for the following annual statewide economic impacts:

- Airports in South Carolina support an estimated **122,759 jobs**.
- The airport supported jobs have an annual payroll estimated at **\$4.8 billion**.
- Annual statewide spending related to the airports and the activities they support is estimated at **\$11.5 billion**.
- Total annual statewide airport-related economic activity is estimated at **\$16.3 billion**.
- Direct airport supported activities contribute annual state and local tax revenues estimated at **\$657 million**.

In addition to these impacts, hundreds of businesses in South Carolina rely on various facets of aviation to improve their efficiency. Companies have staff that travel on commercial carriers or general aviation aircraft. South Carolina companies expand their market areas because customers and suppliers can fly to South Carolina to do business with them. South Carolina employers routinely rely on just-in-time and traditional air cargo shipping for parts and supplies to fuel supply chain management. This study estimates that there are an additional 41,755 jobs in South Carolina that have improved efficiency from their reliance on aviation.

Total employment in South Carolina is estimated by the Bureau of Labor Statistics at 2,232,800. Research and analysis completed in this study shows that when all direct and indirect/induced airport-related employment is considered, these 122,759 jobs, along with the 41,755 aviation-reliant jobs account for over 7% of total statewide employment. Combined, all facets of airport-related economic impacts measured in this study are responsible for an estimated \$16.3 billion in statewide total annual economic activity. Clearly, airports are major drivers of the state's economy!