

South Carolina

THE ECONOMIC
IMPACT OF

Aviation



Introduction

A strong relationship exists between South Carolina's economy and aviation. In today's global market place, the state's system of commercial service and general aviation airports is essential. South Carolina's diversified system of airports helps to both lead and sustain growth and economic diversification. Airports in South Carolina support the state's economy and are themselves economic generators. Residents, businesses, and the state's visitors also rely on the airport system for health, welfare, and safety needs. Further, South Carolina's military airfields are also important to our national security.

To quantify the economic impacts and other benefits attributable to South Carolina's airports and military airfields, the Department of Commerce, through its Aeronautics Office, commissioned this economic impact study.



SOUTH CAROLINA'S AIRPORT SYSTEM

South Carolina is served by a diversified system of commercial service and general aviation airports. The state's 6 commercial service and 54 general aviation airports are essential underpinnings to South Carolina's diversified business base, growing population, and burgeoning tourism industry. In addition, South Carolina is home to 4 busy military airfields.

Aviation is generally assigned to three categories: commercial, general aviation, or military. Commercial aviation includes all scheduled airline flights, charter flights, and flights flown by air cargo companies. All other flights by civilian aircraft are classified as general aviation. Aside from commercial and general aviation, some of South Carolina's public airports also accommodate varying levels of activity associated with military aircraft. The four important military airfields are restricted to military activity.



Commercial Service Airports

South Carolina's commercial service airports include those serving Charleston, Columbia, Florence, Greenville-Spartanburg, Hilton Head, and Myrtle Beach. These airports are served by many of the nation's most prominent domestic airlines. Commercial aircraft that serve South Carolina airports include larger jets that seat over 100 passengers, as well as many regional jets that typically seat 50 passengers. Non-stop scheduled commercial service is provided to most airline connecting hubs in the Northeast, Southeast,

and Midwest. In addition, the commercial service airports in South Carolina support flights by scheduled charter aircraft, including some that originate in foreign countries. Most of South Carolina's commercial service airports are used by air cargo carriers such as FedEx, UPS, and DHL. It is worth noting that a high percentage of total annual takeoffs and landings at all commercial airports is attributable to general aviation aircraft.

General Aviation Airports

General aviation is the largest segment of aviation in the U.S. General aviation aircraft range from high-powered, sophisticated business jets that can fly from South Carolina non-stop to destinations around the world, to small, single-engine planes flown for recreational use. As noted, even at South Carolina's commercial service airports, the highest percentage of

annual aircraft takeoffs and landings are performed by general aviation aircraft. South Carolina has 54 general aviation airports whose capabilities vary based on airport facilities. Many of South Carolina's general aviation airports can serve corporate or business jets and most can serve smaller twin-engine aircraft that are often used by businesses.

Military Airfields

South Carolina is home to two Air Force Bases, Shaw AFB and Charleston AFB. It is worth noting that Charleston AFB is co-located with Charleston International Airport, making this airport a joint military/civilian use facility. South Carolina is also home

to Beaufort Marine Naval Air Station and McEntire Air National Guard Station. The economic benefits of these four military airfields are discussed in this report.





ECONOMIC IMPACTS OF AVIATION

Through the aviation services they accommodate, airports in South Carolina support thousands of jobs and billions of dollars in annual economic activity. The largest employers in South Carolina use commercial service and general aviation airports to increase their efficiency. Employers throughout South Carolina rely on all airports to provide transportation for people, equipment and supplies. South Carolina's general aviation and commercial service airports are also critical to the state's thriving tourism industry. The four military airfields located in South Carolina also make significant annual economic contributions.

Airport Businesses/Tenants

Airports in South Carolina create economic impact in many ways; one of the most visible is through on-airport businesses or tenants. Examples of on-airport business include airlines, flight schools, agricultural sprayers, and providers of aircraft maintenance. Restaurants, ground transportation providers, rental car companies, gift shops, and air cargo companies

and freight forwarders are other examples. Local, state, and/or federal entities charged with the day-to-day operation and maintenance of an airport or the aviation system are also included in this category. For this study, military and civilian activities that are associated with the four military airfields were also evaluated.



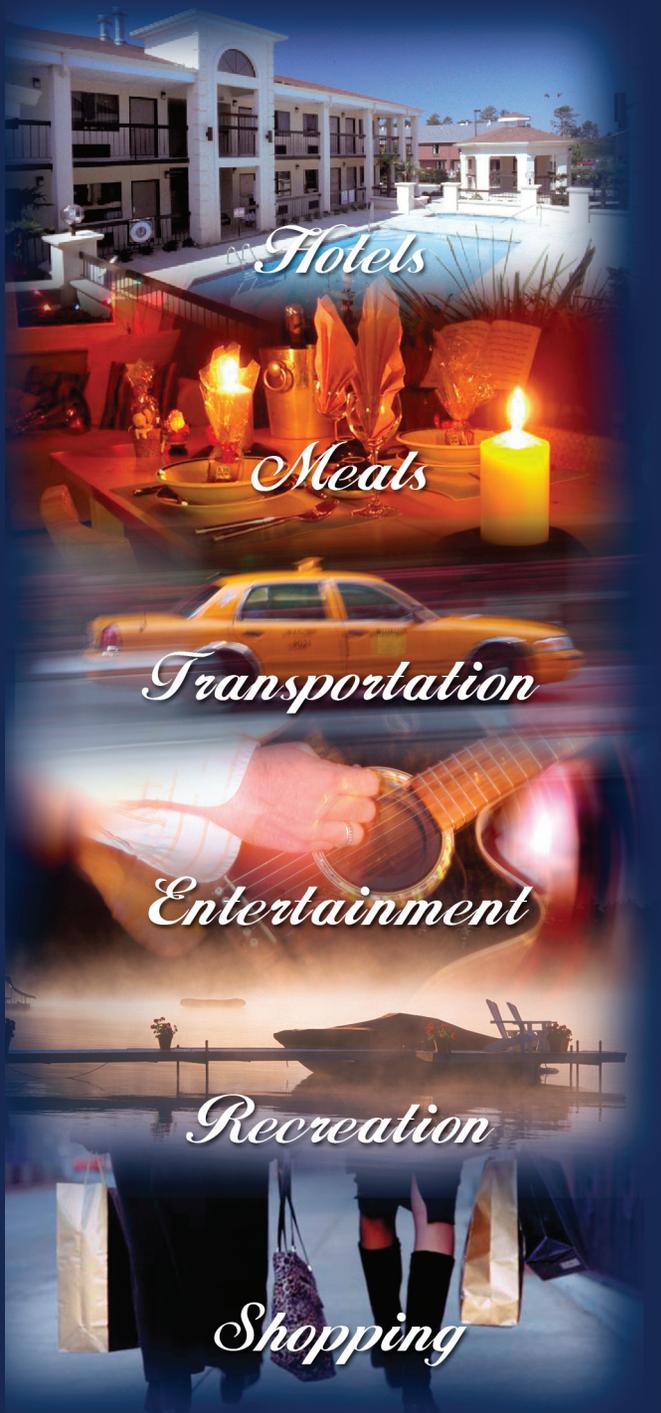
Construction & Capital Improvements

Each year, private, local, state, and federal investment helps to support improvement projects at civilian airports throughout the state. In addition, through the Department of Defense (DOD), annual investment is also made to maintain and improve the four military airfields. When a runway is extended or a taxiway

built, South Carolina workers are employed. These same projects require the acquisition of supplies and other services which further stimulate the local and state economies. Construction projects are responsible for additional aviation related economic activity.



Visitor Spending



Hotels

Meals

Transportation

Entertainment

Recreation

Shopping

Visitors

Visitors who arrive in South Carolina via both commercial service and general aviation airports are responsible for spending and additional economic impacts. Each day, thousands of visitors arrive in South Carolina using one of the airports. Visitors may arrive on a commercial airline flight, a general

aviation charter, or a privately owned general aviation aircraft. Once in South Carolina, these visitors have expenditures for hotels, meals, shopping, entertainment, ground transportation, and other items.

Visitors to South Carolina



Almost 2.6 million visitors arrive in South Carolina by air each year. Each year, visitors who travel to South Carolina by air, spend an estimated \$1.3 billion while in the state.

STUDY METHODOLOGY

A methodology approved by the Federal Aviation Administration (FAA) was used to calculate the economic impacts associated with South Carolina's civilian airport system and four military airfields. Airport related economic impacts were identified for three categories: direct, indirect, and multiplier.

Direct impacts are those associated with on-airport employers, businesses, and tenants. Direct impacts occur as a result of the provision of aviation services. Indirect impacts are those tied to spending by visitors who arrive in South Carolina through one of the public com-

mercial or general aviation airports. As direct and indirect impacts are released into the local, regional, and statewide economies, additional multiplier impacts are created. The economic impacts created by the multiplier effect re-circulate until the benefits ultimately leak outside South Carolina. For this report, multipliers that are specific to South Carolina were used to complete the economic impact analysis.

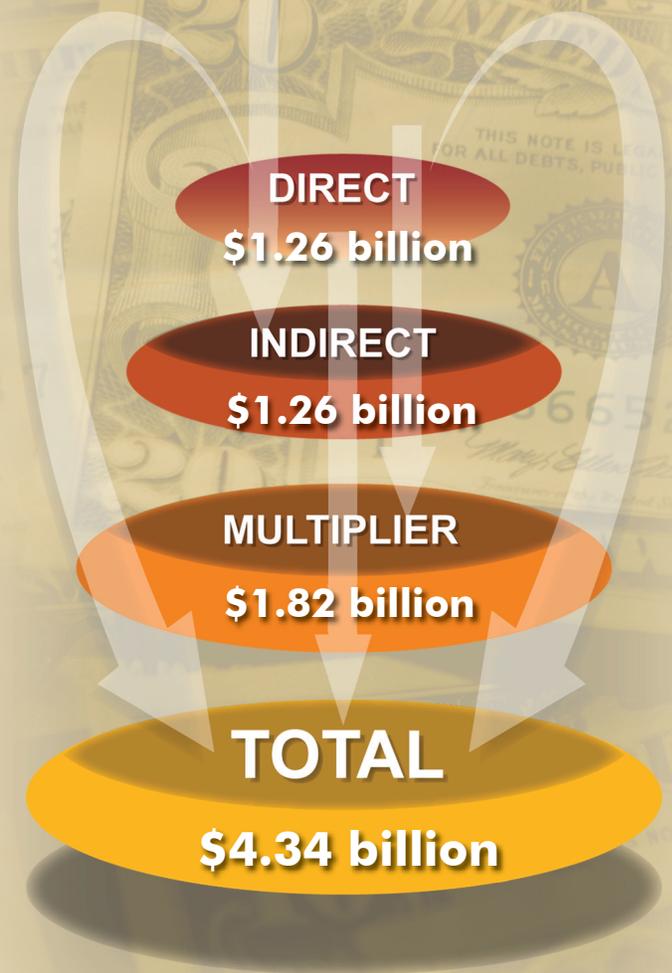
Total economic impacts presented in this report for the state, for each airport, and for each of the four military airfields, are the sum of direct, indirect, and multiplier impacts.

Example of Multiplier Impacts

Many people in South Carolina are employed by businesses located at one of the public airports or by activities that take place at one of the four military airfields. For instance, aircraft mechanics are found at many facilities. When an aircraft

mechanic is paid, he or she uses their income to buy groceries, fuel for their car, shoes for their children, and supplies for their pet. All of this spending helps to support other jobs, payroll, and spending in South Carolina.

Economic Impact Model



Jobs/Employment

IMPACT MEASURES

For this report, economic impacts are expressed in terms of jobs/employment, payroll/earnings, and total annual economic activity or output. For each of these measures, direct, indirect, and multiplier impacts were calculated.

Thousands of jobs, 19,515 full-time equivalent jobs, in South Carolina are directly created by businesses, tenants, and other activities located at commercial service airports, general aviation airports, or at one of the four military airfields. In addition to on-airport jobs, spending by visitors who arrive in South Carolina using one of the commercial service or general aviation airports supports additional indirect employment. Spending by visitors who arrive in South Carolina via one of the airports for business or vacation related trips create an additional 20,703 jobs in the hospitality and service related

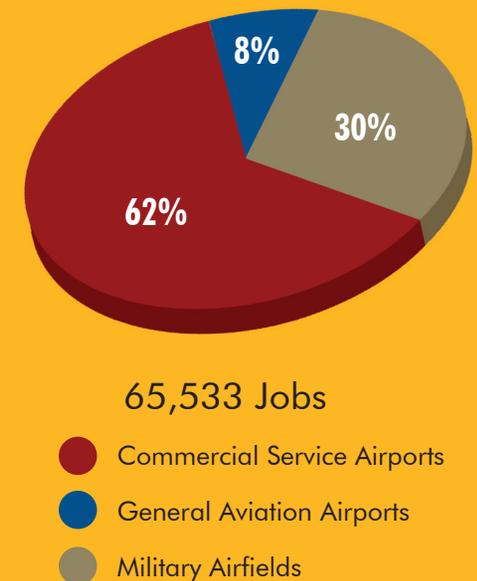
sectors of the economy. Airport, airfield, and visitor related jobs also support an additional 25,315 jobs that arise from the multiplier effect.

This study used a variety of surveys to determine, for the current time frame, just how many jobs are attributable to South Carolina's commercial and general aviation airports or to the four military airfields. The study concluded that when direct, indirect, and multiplier impacts are considered, a total of 65,533 jobs can be traced to commercial and general aviation airports and the military airfields.

ECONOMIC IMPACTS
 JOBS/EMPLOYMENT
 PAYROLL/EARNINGS
 TOTAL ANNUAL OUTPUT

Employment

Commercial	General Aviation	Military	TOTAL
<i>Direct Impacts</i>			
4,093	2,297	13,125	19,515
<i>Indirect Impacts</i>			
20,148	555	0	20,703
<i>Multiplier Impacts</i>			
16,630	2,315	6,370	25,315
TOTAL EMPLOYMENT IMPACT			
40,871	5,167	19,495	65,533



Payroll/Earnings

As noted previously, aviation in South Carolina supports an estimated 65,533 jobs in the direct (on-airport), indirect (visitor), and the multiplier (induced) categories. All of these jobs have annual salaries that contribute to the payroll/earnings benefits identified in this study.

Study findings suggest that the commercial service airports and general aviation airports, and the four military airfields generate \$1.9 billion in annual payroll/earnings benefits.

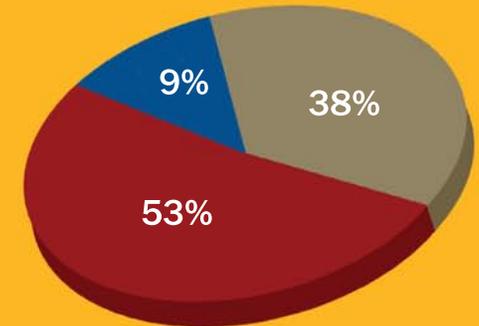


Annual Economic Activity/Output

Airports, the military airfields and related aviation activities all require the purchase of goods and services. Expenditures in this category include those identified in the earning or payroll category. These impacts are expressed as total annual economic activity or output.

This study concluded that commercial and general aviation airports in South Carolina, along with the four military airfields, currently contribute \$4.3 billion in total economic impacts to state, regional, and local economies each year.

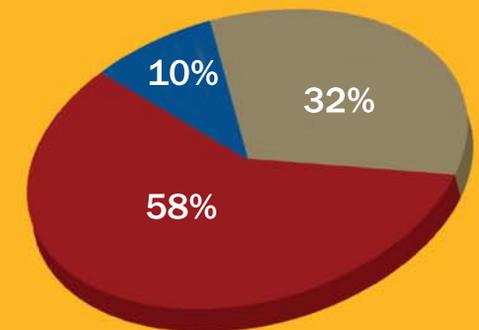
Earnings



\$1.9 Billion Annual Payroll



Total Economic Activity



\$4.3 Billion Annual Economic Output

Note: these total impact estimates include direct, indirect and multiplier impacts.

Aviation Fuel Tax

AIRPORT FUNDING

The state and South Carolina counties also benefit from taxes levied on civil aviation activities, which include fuel sales, property and income taxes. The cost to maintain and improve South Carolina's commercial and general aviation airports is shared by the federal government, the state, local governments, and various private entities. Through the Airport and Airways Trust Fund, the Federal Aviation Administration provides grants to public commercial and general aviation airports for eligible maintenance and development projects. To help airports leverage these much larger federal grants, South Carolina contributes funding to maintenance and development activities at public airports.

South Carolina collects money for airport maintenance and development through taxes levied on airport users. Taxes levied on the sale of general aviation fuel (AvGas) and on jet fuel purchased by general aviation aircraft in South Carolina are now returned to the airport system through investment for maintenance and development. Commercial aircraft are exempt from state fuel taxes.

For the most recent complete calendar year, South Carolina's 5 percent sales tax on jet fuel (for GA use) generated an estimated \$1.6 million in annual tax receipts, while taxes on Avgas generated about \$0.6. In July 2005, recently enacted legislative changes took effect that mandated the deposit of jet

fuel tax receipts, in addition to previously deposited AvGas receipts, into the South Carolina Aviation Trust Fund. These two fuel taxes provide the only state revenue specifically earmarked for the maintenance and development of commercial and general aviation airports in South Carolina.

Almost every state levies a tax on the sale of jet fuel and aviation gasoline. Many states also levy special excise taxes on the sale of these fuels; when these special excise taxes are levied in other states, the funds are most often returned to the airport system for its maintenance and development. South Carolina does not have an excise tax for aviation related fuel sales.



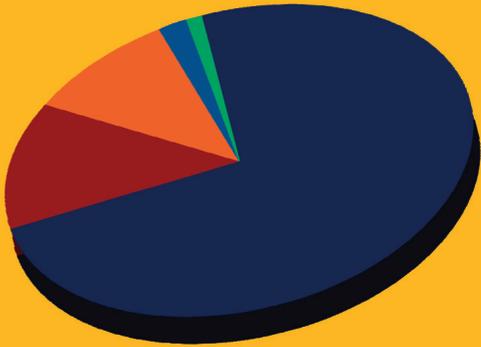
ANNUAL ESTIMATED ECONOMIC IMPACT

Airport Name	Associated City	Total Employment	Total Payroll	Total Output
<i>Commercial Service Airports</i>				
Charleston AFB/International Airport	Charleston	13,680	333,574,900	806,457,400
Columbia Metropolitan Airport	Columbia	6,540	164,900,100	421,403,400
Florence Regional Airport	Florence	656	18,224,100	48,393,600
Greenville-Spartanburg International Airport	Greer	5,911	149,583,000	409,922,100
Hilton Head Airport	Hilton Head Island	1,438	33,071,800	81,804,200
Myrtle Beach International Airport	Myrtle Beach	12,646	325,221,900	756,453,600
Commercial Service Airports Total		40,871	\$1,024,575,800	\$2,524,434,300
<i>General Aviation Airports</i>				
Aiken Municipal Airport	Aiken	66	1,804,300	4,925,100
Allendale County Airport	Allendale	16	414,800	986,900
Anderson Regional Airport	Anderson	176	5,160,100	12,916,400
Bamberg County Airport	Bamberg	1	53,600	124,200
Barnwell County Airport	Barnwell	37	1,286,300	2,142,800
Beaufort County Airport	Beaufort	90	2,201,600	5,127,000
Berkeley County Airport	Moncks Corner	57	1,719,600	4,070,600
Charleston Executive Airport	Charleston	128	3,151,800	8,893,600
Cheraw Municipal Airport	Cheraw	10	243,500	654,600
Chester Municipal Airport	Chester	15	427,500	927,300
Columbia-Owens Downtown Airport	Columbia	218	5,635,800	14,830,000
Conway-Horry County Airport	Conway	96	3,188,700	8,975,400
Darlington County Jetport	Darlington	75	1,886,400	5,251,100
Dillon County Airport	Dillon	1	46,700	136,300
Donaldson Center	Greenville	2,430	103,268,900	222,159,200
East Cooper Airport	Mount Pleasant	26	832,600	1,772,200
Edgefield County Airport	Trenton	1	33,900	53,800
Fairfield County Airport	Winnsboro	9	268,800	768,500
Georgetown County Airport	Georgetown	47	1,167,100	3,352,200
Grand Strand Airport	North Myrtle Beach	137	3,628,900	10,118,700
Greenville Downtown Airport	Greenville	453	13,433,900	35,198,300
Greenwood County Airport	Greenwood	40	993,800	2,750,400
Hampton-Varnville Airport	Hampton	2	62,400	148,100
Hartsville Regional Airport	Hartsville	8	292,600	672,200
Hemingway-Stuckey Airport	Hemingway	0	8,800	13,800
Hester Memorial Airport	Calhoun Falls	1	34,700	84,300
Holly Hill Airport	Holly Hill	0	13,900	25,800

Airport Name	Associated City	Total Employment	Total Payroll	Total Output
<i>General Aviation Airports (Continued)</i>				
Lake City Municipal Airport	Lake City	1	41,000	84,000
Lancaster County Airport	Lancaster	43	998,300	2,448,800
Laurens County Airport	Laurens	6	229,800	517,500
Lee County Airport	Bishopville	3	112,800	282,500
Lexington County at Pelion Airport	Pelion	9	228,100	494,900
Lowcountry Regional Airport	Walterboro	69	2,027,300	4,700,000
Marion County Airport	Marion	9	226,100	460,300
Marlboro County Airport	Bennettsville	8	242,800	571,600
McCormick County Airport	McCormick	1	50,900	125,900
Newberry County Airport	Newberry	11	317,800	726,200
Oconee County Regional Airport	Clemson	107	2,686,800	6,296,400
Orangeburg Municipal Airport	Orangeburg	68	1,862,900	4,341,200
Pageland Airport	Pageland	3	126,200	311,000
Pickens County Airport	Pickens	189	4,215,900	10,361,600
Ridgeland Airport	Ridgeland	6	177,700	425,600
Robert F. Swinnie Airport	Andrews	7	234,800	596,400
Rock Hill-York County Airport	Rock Hill	87	2,339,500	6,934,300
Saluda County Airport	Saluda	12	369,400	1,118,500
Santee-Cooper Regional Airport	Manning	18	417,300	1,177,200
Spartanburg Downtown Memorial Airport	Spartanburg	190	5,205,100	15,410,400
St. George Airport	St. George	5	170,200	465,300
Summerville	Summerville	49	1,128,600	3,170,200
Sumter	Sumter	46	1,184,200	3,163,600
Twin City	Loris	9	314,100	843,100
Union County	Union	10	319,900	824,500
Williamsburg Regional	Kingstree	10	327,700	972,700
Woodward Field	Camden	51	1,195,300	3,450,100
General Aviation Airports Total		5,167	\$178,011,500	\$417,352,600
<i>Military Airfields</i>				
Beaufort MCAS	Beaufort	4,337	165,876,800	311,821,700
Charleston AFB	Charleston	8,127	310,840,900	584,330,600
McEntire ANGS	Eastover	1,347	51,521,600	96,852,300
Shaw AFB	Sumter	5,684	217,398,400	408,674,000
Military Airfields Total		19,495	\$745,637,700	\$1,401,678,600
Total South Carolina Airports		Total Employment	Total Payroll	Total Output
		65,533	\$1,948,225,000	\$4,343,465,500

Note: these total impact estimates include direct, indirect and multiplier impacts.

Total Annual Aviation Related Taxes



\$73.6 Million Total Tax Benefits

	Income Tax	74%
	General Aviation Property Tax	13%
	Commercial Aviation Property Tax	10%
	Jet Fuel Tax	2%
	AvGas Tax	1%

Property Tax

South Carolina also collects property taxes on general aviation and commercial aircraft. The State Department of Revenue levies a tax on commercial aircraft based on a formula that considers overflight, landed time in the state, and aircraft values. Between 1993 and 2004, the state collected an average per year of \$3.7 million from commercial airline personal property taxes; these taxes were deposited in the General Fund. It is worth noting, that in 2004, taxes collected from commercial airlines and deposited in the state's General Fund rose to \$7.3 million. Now defunct, start-up low cost carrier Independence Air was responsible for much of the increase recorded in 2004.

General aviation aircraft owned by individuals and companies that are registered in South Carolina are

also subject to personal property taxes. These taxes and the rate of taxation are determined at the county level. If taxes are set too high, they may discourage aviation related activities within that county. Property taxes on aircraft are collected by each of South Carolina's 46 counties. These taxes are redistributed within each county based on local formulas for taxing authorities in each county. County funds collected from taxation of aircraft are most often used for schools, special municipal projects, and some airport projects. For the most recent complete calendar year, when all county collections are considered, an estimated \$9.4 million in personal taxes on general aviation aircraft in South Carolina were collected and returned to the counties.

Income Tax

When direct, indirect, and multiplier impacts are considered, an estimated 65,533 jobs in South Carolina are in some way attributable to the airports and the military airfields analyzed in this study. Individual income tax collections in South Carolina total \$2.8 billion annually and account for over 40 percent of all tax revenue that goes into the General

Fund. This study estimates that \$40.8 million in individual income tax is collected from jobs that are created from direct, indirect, and multiplier impacts associated with commercial and general aviation airports. It is estimated that an additional \$13.9 million in individual income tax is collected from jobs associated with the four military airfields.

Total Tax Benefits vs. Current State Investment

When taxes on fuel, personal property and income are considered, airports, airfields, aviation related activities and those employed by aviation contribute at least \$73.6 million to the tax base of the state or one of its 46 counties. Fuel taxes and property

taxes alone account for an estimated \$18.9 million in annual tax receipts for the state and its counties. The projected \$2.2 million in aviation fuel taxes that should be allocated to the State Aviation Fund represent 12 percent of aviation-related taxes.

Anticipated Flow of Aviation-Related Taxes



State Investment vs. Federal Funding and Annual Output

South Carolina's investment in general aviation and small commercial airports (Florence and Hilton Head) averages \$1.3 million per year. Much of this state investment (along with \$2.0 million in local matches) is used to leverage Federal grants from the FAA, which average \$14.2 million per year. Combined,

state, local and federal investment in general aviation and small commercial airports averages \$17.5 million per year. Comparison of this \$17.5 million in public investments to the current annual output of \$547.6 million at general aviation and small commercial airports indicates an impressive return on investment.

OTHER QUALITATIVE BENEFITS

Airports throughout South Carolina help to support and improve the quality of life for all residents of, businesses in, and visitors to the state. Airports support many activities in the health, welfare, safety, and environmental services category. According to information gathered as part of this study, airports in South Carolina support recreational activities, they serve as the gateway to many communities and tourist attractions, they accommodate agricultural spraying, they support air cargo and air freight shipments, they help law enforcement, they support the military

and its operations, they provide access in times of emergency, and they support medical needs and the medical profession.

Airports in South Carolina house aircraft that are used for important insect and pest control activities. Airports also support aircraft that are used to distribute important aerial applications to crops and forests throughout the state. Airports support fire fighting activities for forests and grassland areas, and they are routinely used in disaster relief efforts. Airports are used by law enforcement and

search and rescue groups on a daily basis. Airports are used for medical evacuation and doctors throughout the state use the airport system to hold clinics and see patients.

Airports in South Carolina touch and improve everyone's quality of life, even those individuals who never directly use one of the commercial or general aviation airports or the many services they support.

HURRICANE RELIEF

RECREATIONAL FLYING

AERIAL ADVERTISING

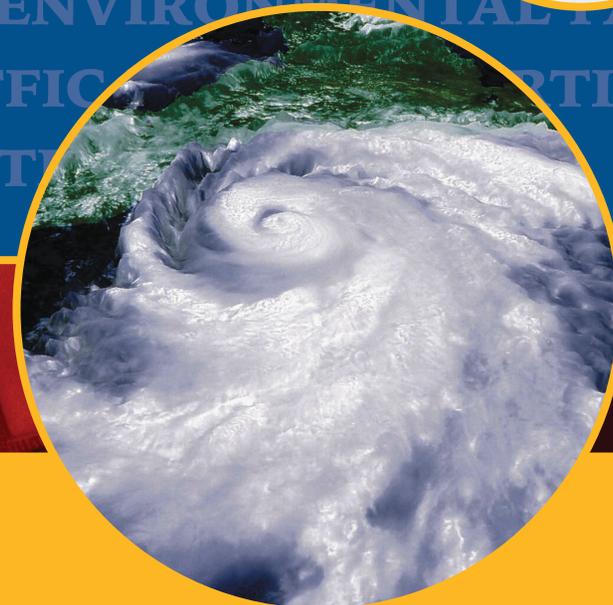
MEDICAL EVACUATION

ENVIRONMENTAL PATROL

AGRICULTURAL SPRAYING

TRAFFIC REPORTING

FOREST/WILDFIRE FIGHTING



BUSINESS RELIANCE ON AVIATION AND AIRPORTS

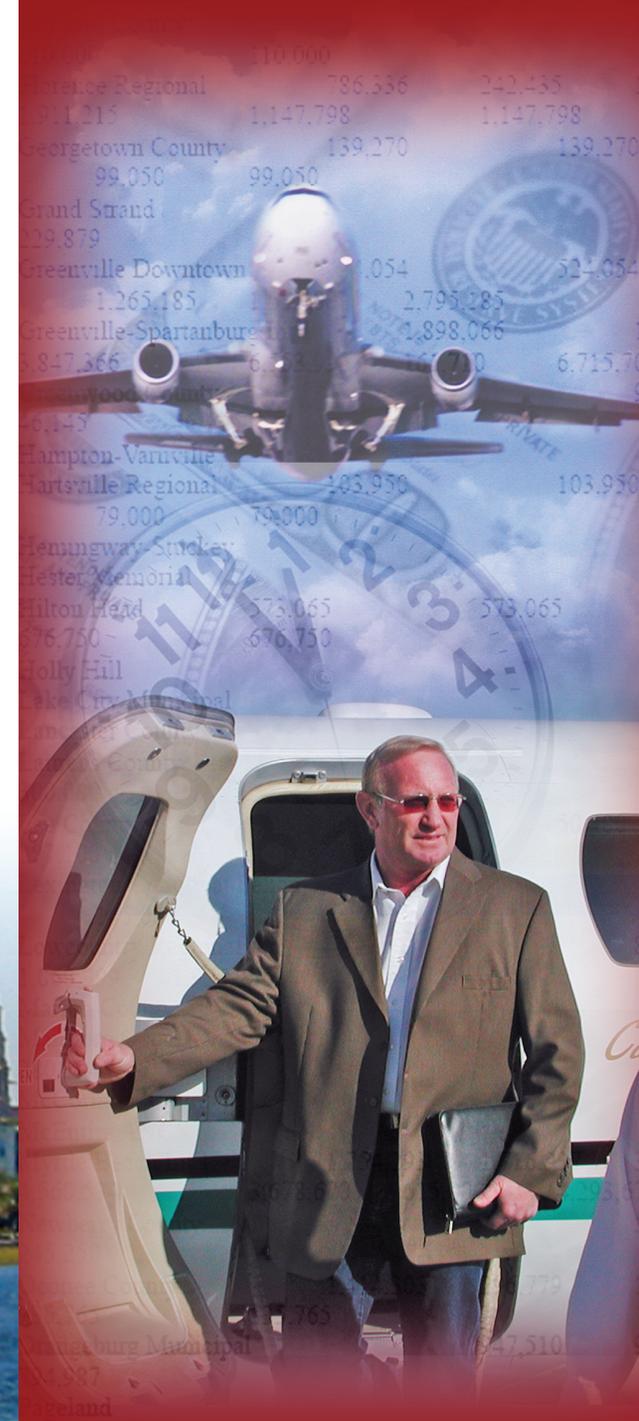
All types of businesses in South Carolina rely on aviation and commercial service and general aviation airports for the efficient transport of people and goods. As part of this study, over 3,000 South Carolina businesses in the manufacturing, transportation, telecommunications, engineering/consulting, and utility sectors were surveyed to understand their dependence on aviation. This dependence arises from the use of scheduled commercial airline service, charter carrier flights, general aviation, air cargo, freight forwarders, or air express shipments.

Over 97 percent of the respondents indicate that their company uses commercial airline service to support their business activities in some way. Among the respondents to this study's survey, 40 percent indicate that they or their customers or suppliers use

general aviation on a regular basis to support their operations.

Respondents were also asked to rank the importance of 15 factors regarding their ability to maintain and expand operations in South Carolina. Among these, proximity to a commercial service airport ranked in the top five factors, and proximity to a general aviation airport ranked in the top 10 factors.

Those companies responding to the survey indicated that without an adequate airport system to support their business activities, they would be forced to cut employment in South Carolina by an estimated 12 percent. Airports are a critical part of the transportation infrastructure needed to retain and attract business development in the state.



AVIATION'S PAST & CURRENT ECONOMIC CONTRIBUTION

As demand for South Carolina's airports continues to grow, so will the economic and other benefits attributable to the airport system. In fact, since the economic impacts of South Carolina's airport system were last measured in 1990, benefits have increased as shown. This impact growth reflects a greater presence of businesses and tenants at the civilian airports and an increased number of visitors who arrive by air.

Comparison of Commercial and General Aviation (Civilian Airports) Impacts

	Jobs	Payroll	Econ. Output
1990	24,592	\$.34 billion	\$1.05 billion
2005	46,038	\$1.2 billion	\$2.94 billion

South Carolina's economic benefits from commercial and general aviation (civilian airports) have experienced a significant increase since 1990. The number of jobs at the civilian airports has grown from 24,592 to 46,038; annual payroll associated with these jobs increased from \$.34 billion to \$1.2 billion. Total annual economic output from the civilian airports increased from \$1.05 billion in 1990 to \$2.94 billion in 2005.

Aviation's Economic Impact in South Carolina

	1990	Current
Commercial Airports		
Total Jobs/Employment	20,386	40,871
Annual Payroll/Earnings	\$0.27 billion	\$1.02 billion
Total Annual Economic Activity/Output	\$0.83 billion	\$2.52 billion
General Aviation Airports		
Total Jobs/Employment	4,206	5,167
Annual Payroll/Earnings	\$0.07 billion	\$0.18 billion
Total Annual Economic Activity/Output	\$0.22 billion	\$0.42 billion
Military Airfields		
Total Jobs/Employment	34,618	19,495
Annual Payroll/Earnings	\$0.64 billion	\$0.75 billion
Total Annual Economic Activity/Output	\$1.99 billion	\$1.40 billion
TOTAL ECONOMIC IMPACT		
Total Jobs/Employment	59,210	65,533
Annual Payroll/Earnings	\$0.98 billion	\$1.95 billion
Total Annual Economic Activity/Output	\$3.04 billion	\$4.34 billion

Note: these total impact estimates include direct, indirect and multiplier impacts.

Summary

As this report demonstrates, airports, aviation, and military airfields in South Carolina are economically significant. Aviation is critical to business, it is essential to tourism, and it provides economic, tax, and quality of life benefits in each of the 46 counties. Some of this study's major findings include:

- Airports are critical to South Carolina's growth and economic diversification.
- Everyone's quality of life is improved by activities supported by airports in South Carolina.
- An estimated 40 percent of South Carolina's employers, who participated in this study, indicate that they rely on general aviation to support their business activities.
- Businesses, who participated in this study, indicate that without a high quality commercial and general aviation airport system, an estimated 12 percent of their employment in South Carolina could be adversely affected.
- Over 20,000 jobs in South Carolina are supported by the spending of visitors who arrive by air.
- Since 1990, jobs at general aviation and commercial airports in South Carolina increased by 87 percent, annual payroll increased by 248 percent, and total annual economic output increased by 182 percent.
- Only 12 percent of all aviation related taxes collected in South Carolina are returned to the State Aviation Fund.

Aviation, commercial service airports, general aviation airports, and military airfields in South Carolina support an estimated 65,533 jobs that have a current annual payroll estimated at \$1.9 billion. Annually, at least \$4.3 billion in economic activity can be traced to aviation in South Carolina. Aviation and airports also contribute at least \$73.6 million each year in tax benefits to the state and its counties.

A first class airport system is essential to South Carolina. This study found that a strategic program to invest in, maintain, and grow commercial and general aviation airports is critical to South Carolina's economic future.





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