

MARYLAND AIRPORT ECONOMIC IMPACT STUDY

Prepared for the
MARYLAND AVIATION ADMINISTRATION



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Chapter 1 INTRODUCTION

Maryland's airports are valuable transportation assets for the state's residents, businesses and visitors. Area residents and businesses increasingly depend on aviation for business and personal travel. Visitors increasingly arrive by air to conduct business and/or to enjoy area amusements and recreation opportunities. In addition to the commercial air passenger service at Baltimore/Washington International, Cumberland Regional, Salisbury-Wicomico Regional and Washington County Regional, many people and corporations also rely on the general aviation services at the other 31 public use airports. By providing these essential air transportation services, Maryland's airports facilitate economic growth.

Recognizing that airports are instrumental in providing for the economic well being of the state's residents, but uncertain as to the magnitude of their total economic value, the Maryland Aviation Administration conducted the "Maryland Statewide Airports Economic Impact Study" in 1990. The study included an exhaustive survey and/or interview process of each of the airport managers and airport tenants.¹ The study documented the economic impacts associated with each of Maryland's public - use airports. The report proved useful to local and State officials in understanding and conveying the economic benefits associated with airports.

Since 1990 many changes have occurred at Maryland's airports, which led to the need for an update of the Study's findings. This update study included a detailed survey and interview process of BWI's operations and its tenants, as well as a survey of the other 34 airport managers, eleven of which also were visited.

Economic Impact Study Purpose

This paper is explanatory and documentation oriented -- it explains how the local residents and their businesses economically benefit from aviation at Maryland's airports, and it documents the airports' economic impact. Specifically, this paper quantitatively estimates the annual economic contribution which the airports make on three regions; (1) Eastern Maryland, (2) Central Maryland, (3) Western Maryland, and the entire State.

Study Products

The study quantified three types of economic impact at Maryland's Airports:

- ➔ **Direct Impacts** - The dollar value of business activities involved in the provision of airport and airport-related services. These impacts comprise the airport-based activities of the airlines, airline support firms, airport tenants, car rental agencies, ground shuttle operators, general aviation firms and others.

¹Except for BWI, whose impacts were updated based on an earlier 1986 economic impact study conducted by Gellman Research Associates, Inc.

- ✈ **Indirect Impacts** - The dollar value of activities associated with the use of airport services. These impacts include the commercial and general aviation air passenger impacts and the travel agency impacts.
- ✈ **Multiplier Impacts** - The dollar value and job impact due to the supply and responding effects of the direct and indirect impacts.

The Regional Input-Output Multiplier Model (RIMS-II), provided by the U.S. Department of Commerce Bureau of Economic Analysis, was used to estimate these multiplier impacts. The model also is used to measure the total economic impact in three ways:

- ✈ **Economic Activity** - The dollar value of output associated with aviation.
- ✈ **Earnings** - The payroll paid to people whose jobs are directly or indirectly attributable to aviation.
- ✈ **Jobs** - The number of "Full Time Equivalent" jobs directly or indirectly attributable to the Airport and its use.

The RIMS-II model presents these three impact measures for the major 38 industries that represent all major Standard Industrial Classifications (SIC). This enables one to see how the aviation activity at the airports benefit many people in the region -- regardless of whether or not they use an airport or work at an airport.

The direct and indirect impacts for both the local regions (Eastern, Central and Western Maryland) and the State are the same. The difference between the regions' total impact measures arose due to the larger impact region of the State versus the smaller sub regions, which results in a larger multiplier impact. The total annual economic impacts generated directly or indirectly from aviation activity at the 35 airports on their local economies and on the State's overall economy is:

**Exhibit 1
MARYLAND AIRPORTS TOTAL ECONOMIC IMPACTS
1995**

	Local <u>Impacts</u>	Statewide <u>Impacts</u>
Annual Economic Activity (\$Million)	\$4,333.3	\$4,469.8
Annual Earnings (\$Million)	\$1,367.5	\$1,405.9
Jobs	58,407	60,092

Source: Wilbur Smith Associates and Bureau of Economic Analysis.

In addition to detailing how these impacts were estimated, this report also presents the impact per aviation activity relationships, employment impacts by airport activity type, total impacts by the major industry types, and the local and state tax impacts.

Chapter 2

ECONOMIC IMPACT METHODOLOGY

The economic impact of Maryland's 35 public use airports was calculated using a methodology which evolved over the past decade and is nationally recognized as the standard for conducting economic impact studies for airports. The methodology is consistent with that advocated by the Federal Aviation Administration (FAA), and explicitly follows FAA-suggested procedures.² The study also used the official input/output model of the United States Government, as developed by the U.S. Department of Commerce,³ with multipliers which are specific to (1) Eastern Maryland, (2) Central Maryland, (3) Western Maryland and (4) the State of Maryland.

The study methodology is an "impact" approach rather than a "transportation benefits" approach. Therefore, the study does not explore the efficiencies of, the productivity associated with, or the travel benefits to be derived from air travel. Rather, it measures the importance of aviation as an industry in terms of the employment and earnings it generates and the locally produced goods and services which it consumes.

For study purposes, airports were evaluated as they presently exist. The evaluation does not attempt to ask what would happen to the economy if the airports suddenly ceased to exist, or was greatly expanded, since such events would be speculative at best. Rather, the study examined the airport as an industrial unit, and explains quantifiable impacts that occur at the airport or because of the airport.

All impacts are expressed in annual terms, with all impact calculations based on the latest full year for which data are available (generally for the year 1995). All economic impacts are expressed in terms of dollars or jobs. The dollar impacts themselves comprise financial transactions that are of benefit to the residents and businesses of the airports' service regions and/or the State of Maryland. Care is taken to avoid double counting of impacts, e.g., when an FBO's lease payment or fuel flowage fee payment to an airport operator is included in the FBO's expenditure impact, it is not also included in the airport operator's impact.

While the study results, prepared in conformance with the approved FAA methodology, detail the airport's economic impacts as an operating unit, the results may not indicate the airport's full benefit to its local economy. The FAA methodology specifically does not attempt to measure the transportation benefits of an airport that arise from increased efficiency in shipping products, attracting customers and transporting employees. Typically, however, numerous business managers indicate emphatically that their firms located in a local community because of the aviation access (e.g. these transportation benefits) provided by the local airport. The current methodology, however, arose from a conservative standpoint which guards against overstatement of the

²"Estimating the Regional Economic Significance of Airports," Federal Aviation Administration, Washington, DC, 1992.

³"Regional Input-Output Modeling System," U.S. Department of Commerce, Bureau of Economic Analysis.

economic impacts. Therefore, the fact that the airport is an important factor in some firms location is agreed to by many, but no universally accepted methodology has been established for accurate and statistically sound measurement of these additional and important off-site impacts.

2.1 Types of Economic Impact

Airport economic impacts are generated in three ways: 1) Direct, 2) Indirect, and 3) Multiplier Impacts. Combined, the three impact types yield the total economic impacts of an airport, as shown in Exhibit 2.

Exhibit 2
ECONOMIC IMPACT TYPES

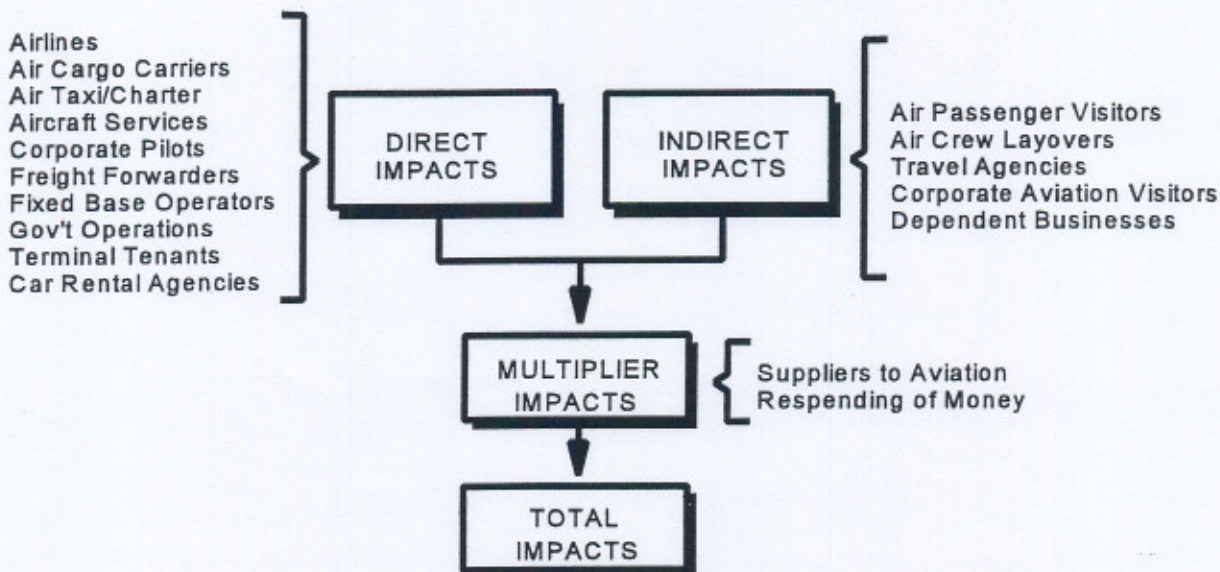
+	Direct Impacts
+	Indirect Impacts
+	Multiplier Impacts
=	Total Impacts

Direct Impacts - These economic impacts occur as a consequence of providing aviation services. They include expenditures by firms which carry passengers (air carrier, air charter or air taxi) or cargo; firms which serve the air carrier and general aviation functions (aviation support); airport tenants (i.e. terminal businesses); governmental agencies which support aviation; ground transport firms; and others. In every instance, the impacts include only expenditures where the recipient is located within the airport's service area.

Indirect Impacts - These economic impacts occur as a result of the use of aviation service. They include the regional expenditures made by air passengers who visit the region (at hotels, restaurants, etc.), by out-of-town airline crews on overnight layovers, and by firms having economic activity which is dependent on the airport.

Multiplier Effects - The "indirect" and "direct" impacts represent increases in regional final demand. Such increases do not represent total economic impact; rather, a "multiplier" effect also exists. This multiplier effect comprises the local value of money as it circulates through the local economy and as individuals or firms associated with airport business buy goods and services in the local economy. Therefore, an airport's total economic impact is the sum of the three types of impacts. The components of these three impact types are shown in Exhibit 3.

Exhibit 3
COMPONENTS of ECONOMIC IMPACT TYPES



2.2 Determining Direct Impacts

"Direct" impacts include local expenditures at or near the airport by firms involved in the provision of aviation services, such as the airlines, fixed-base operators, aircraft maintenance and repair firms, flight and ground schools, the control tower, etc. Only those firms whose activities are attributable to aviation were included; any impacts caused by "non-aviation related" firms were not assessed. Any partially related firms were only assessed on the components of their business that are aviation related.

Except for Martin State, military impacts are excluded in this analysis because no military units are based at the airports, itinerant military aircraft pay no landing fees and are exempt from fuel flowage fee, and any military fuel or purchases made at an airport would be reflected in the airport tenant expenditures. The military impacts at Martin State, however, are included because of the Air National Guard unit that operates out of the airport.

The aviation provision impacts included in the analysis consist of three general classifications:

- Direct Payroll - The annual gross payroll for any employed person at an airport whose job is attributable to the provision of aviation and aviation related services.
- Capital Expenditures - Investment at or near an airport by either the airport operator or by the airport's various public and private tenants. Only the money spent locally, within the airport's service area (i.e. approximately a 100 mile radius), is included.

- ➔ Operating Expenses - The annual costs of operation of the airport operator, businesses, tenants and agencies at an airport. Only the expenditures made locally (in the airport's service area) are included.

Calculation of the "Direct" impacts in the original 1990 study comprised a four-step process:

1. Airport Operator Data Request - Background information from the airport operator was obtained regarding; airline passengers, cargo tonnage, aircraft operations, etc. In addition, a tenant listing (including contact name, address and phone number); and airport operator information concerning jobs, revenues and expenditures was obtained.
2. Airport Surveys - With the information provided by the airport operator, a list was developed of airport tenants and other firms believed to provide some form of aviation service (or impact). Surveys were developed and mailed out to all the tenants and related firms. The surveys requested information on employment, operations, and revenue and expenditures. A copy of each survey form is presented in Appendix B.
3. Airport Visits - After approximately six weeks the Consultant visited the airports interviewing the airport operator and tenants. Previously collected information was verified and missing information was collected. This process provided insights into the airport's overall operation and the economic roles which the various aviation functions and entities play at the airport.
4. Direct Impact Calculations - These impacts include only those expenditures which are of benefit to the impact area. Therefore, adjustments were made to recognize expenditures that "leak" to places outside of the impact area, e.g., aircraft parts, and equipment expenditures in cases where the source is external to the area. Survey responses were evaluated to check on reasonableness of results, e.g., payroll per employed person, etc. In each case care was taken to avoid "double counting" of impacts. For example, if an air cargo carrier hires a cargo handler at the airport to store or transport cargo, the air cargo carrier's expenditures paid to the cargo handler are excluded.

Since the previous 1990 study based the BWI impacts on an earlier 1986 study by another consultant, it was determined that this entire four-step detailed process be used to estimate BWI's 1995 economic impacts. However, the impacts for the other 34 airports were estimated based on changes in airport operations since the earlier 1990 study. To identify how these 34 airports' economic impact have changed the following steps were taken:

1. Airport Operator Data Request - Similar to the earlier 1990 study described above. Also inquired about tenant employment levels and any significant changes at the airport.
2. Airport Visits - In addition to BWI the following airports were visited and interviews were conducted with the airport managers. Some tenants were also contacted. The airports listed below were selected for a variety of reasons, including current and future anticipated impacts.

Greater Cumberland Reg. Airport
Washington Co. Reg. Airport
Bay Bridge Airport
Carroll County Reg. Airport
Easton Muni. Airport
Frederick Muni. Airport

Garrett County Airport
Martin State Airport
Montgomery County Airpark
Ocean City Muni. Airport
Saint Mary's County Airport

3. Data Comparison - Data on aircraft operation, based aircraft, airport employment, capital expenditures, etc., gleaned from the airport data request and visits was used to estimate how the economic impacts at the airports have changed since 1990. In addition, the Consumer Price Index (CPI) was used to adjust for cost of living changes between 1990 and 1995.

2.3 Determining Indirect Impacts

The "Indirect" impacts include expenditures by airport users which are made in the impact area. These consist of expenditures: by visitors to the region who arrive via the airports, airline crew over-night layovers and travel agents located in the State of Maryland. These economic impacts were categorized three ways:

- ➔ Visitor Expenditures - Money spent in the regional economy by commercial and general aviation air passengers who arrived in the region via the specific airport. Only money spent by visitors (people who do not reside in the region) was included.
- ➔ Regional Expenditures - Ground travel expenditures made in connection with airport usage by local area residents.
- ➔ Other Expenditures - Financial transactions by airport dependent businesses which were not included in the direct impacts (such as travel agents).

Visitor Expenditures - Air visitor expenditures were calculated in a manner consistent with the methodology advocated by the Aircraft Owners and Pilot Association (AOPA). That methodology estimates the number of visitors arriving at the airport and multiplies the number of visitors by an estimated average expenditure rate per visitor.

Visitors are defined as persons who reside in places external to the airport's region of impact who arrive in the region via an airport. They include non-resident commercial air passengers and general aviation pilots and passengers. To estimate the visitor expenditures at the airport, the following estimates were made:

- ➔ Number of annual arriving visitors by type of air arrival (i.e., commercial air passenger versus general aviation);

- ➔ Average length of stay in the region by the different visitor types;
- ➔ Average daily expenditure in the region by the different visitor types; and
- ➔ Classification of expenditures by type (hotel, food, retail, entertainment and transportation).

The data was developed separately for the air carrier and the general aviation passenger. For the commercial air passenger impacts at BWI, passenger information from the MAA and from the "1992 Washington-Baltimore Regional Air Passenger Survey"⁴ was used. MAA information separated the number of connecting passengers from resident and visiting passengers. The Survey information separated resident and visitor passengers, and provided necessary data to estimate the visitor average length of stay and average daily expenditures.

Regarding general aviation (GA) visitor impacts, discussions with the fixed-base operators were used in conjunction with information from previous GA visitor expenditure surveys and interviews at other airports with GA operations. This information was combined to generate estimates regarding average duration of stay, average expenditure and expenditure types.

Regional Expenditures - The local transportation expense of area residents who drive to and from the airport generates additional impacts. These impacts were calculated based on the estimated number of residents who fly from each airport, the average distance driven, and variable operating costs per mile.

Other Expenditures - In addition to the visitor and regional expenditures other impacts associated with travel agencies, and dependent businesses also generate economic impacts in Maryland. Travel agents depend, in large part, on the existence of commercial airports for their livelihood. Many of the commissions earned by travel agents are derived from the travel arrangements made for air passengers who fly from Maryland's commercial airports. To estimate the magnitude of this impact, information on gross ticket sales in Maryland data was obtained from the Airline Reporting Corporation (ARC). Passenger enplanement data at the four commercial airports was used to determine what percentage of Maryland's travel agency commissions was attributable to each airport. In addition, an estimate of the percent of these ticket sales attributable to travel from other regional airports outside of Maryland (i.e. Dulles and National) was also made based on the 1992 passenger survey. The survey reported the percent of passengers from each of Baltimore's metropolitan counties that fly from BWI versus Dulles or National.

Only one airport experienced other notable off - airport dependent business impacts. At Frederick, the Aircraft Owners and Operators Association (AOPA) and AVEMCO, an aviation

⁴1992 Washington - Baltimore Regional Air Passenger Survey, Metropolitan Washington Council of Governments in cooperation with the Metropolitan Washington Airports Authority, the Maryland Department of Transportation and the Virginia Department of Aviation.

insurance corporation, are located adjacent to the airport. Due to the aviation nature of their businesses, both entities required a location at an airport.

2.4 Determining Multiplier Impacts

The "Direct and Indirect" economic impacts represent increases in final demand in the airport impact areas. Such final demand increases, however, do not represent the total economic impact value attributable to the airports. There is also a "multiplier" effect which must be added to the final demand increases to attain the total economic impact. This multiplier effect was measured utilizing the RIMS-II multiplier coefficients for the impact areas, as developed by the U.S. Department of Commerce, Bureau of Economic Analysis.

Multiplier Concept - The "multiplier" is used to trace money as it flows through the regional economy. The longer that the money stays in the region, the better off the region is and the higher the multiplier. The multiplier indicates that, as the money is used over and over again, many people and businesses benefit, even if they do not use or directly serve the airports.

For example, if an airline employee earns \$100 at the airport, and uses it to buy \$100 worth of groceries, he is better off by \$100 because he has \$100 worth of groceries, and the local grocer is better off because he has the \$100. The grocer then pays his employees, the delivery truck operator, etc. all of whom then are slightly better off due to the airport. The multiplier traces this flow of funds until the money ultimately leaks to places outside the impact area, or reaches the source of its raw material. Therefore, the larger and more developed the impact area, the longer the money remains in the regional economy, resulting in a higher average multiplier.

RIMS-II Model - The U.S. Department of Commerce, Bureau of Economic Analysis, Regional Input-Output Modeling System (RIMS-II) was used to estimate the multipliers. To use the model, the direct impact and indirect impact values were categorized into industrial codes for input-output model use. The multiplier calculation process uses the full 38-row by 471-column industries matrix of the U.S. Department of Commerce RIMS-II model, in computerized format. The total output multipliers included household earnings in each row industry group. Final demand expenditure or sales data was entered into the model under a variety of different classifications, depending on the nature of the final demand activities. These aviation related expenditure types and their respective RIMS-II classifications are presented below in Exhibit 4.

Recognizing that the multipliers vary from place to place, depending on a location's size (population) and economic base, four different "impact areas" were selected for this study: Eastern Maryland, Central Maryland, Western Maryland and the entire State of Maryland. This enables one to measure the airport's impact on its local economy and on the State as a whole. The counties and airports located within each impact area are shown in Exhibit 5.

Exhibit 4 IMPACT TYPE and RIMS-II MODEL COEFFICIENTS Maryland Airports		
	RIMS-II MODEL COEFFICIENTS	
IMPACT TYPE	Code	Description
<u>Direct Impacts</u>		
Airline Operations	65.0500	Air Transportation
	65.0701	Cargo Transportation
Airline Support Service	65.0500	Air Transportation
Ground Transportation	75.0001	Auto Rental
	65.0200	Land Transportation
Airport Tenants	69.0200	Retail Trade
	74.0000	Eating & Drinking Places
	76.0206	Business Services
General Aviation	65.0500	Air Transportation
Government	65.0500	Air Transportation
	79.0300	State and Local Government
Capital Improvements-Buildings	11.0000	New Industrial Buildings
Capital Improvements-Airfield & Roads	11.0000	Highways and Paving
Building Maintenance	11.0000	Maintenance and Repair
Aviation Fuel	31.0101	Petroleum Fuel
Payroll	91.0000	Personal Consumption
Utilities	68.0100	Electricity & Utility Service
<u>Indirect Impacts</u>		
Food & Beverage	74.0000	Eating & Drinking Places
Lodging	72.0100	Hotels & Lodging
Entertainment	76.0206	Amusement & Recreation
Retail Sales	69.0200	Retail Trade
Other	73.0109	Business Services
Ground Transportation	65.0200	Land Transportation
Travel Agencies	65.0702	Arrangement of Passenger Transportation
Motor Vehicle Part Manufacture	59.0302	Motor Vehicle Part Manufacture

2.5 Three Measures of "Economic Impact"

The RIMS-II model output provides three measures of the total economic impact attributable to Maryland's airports.

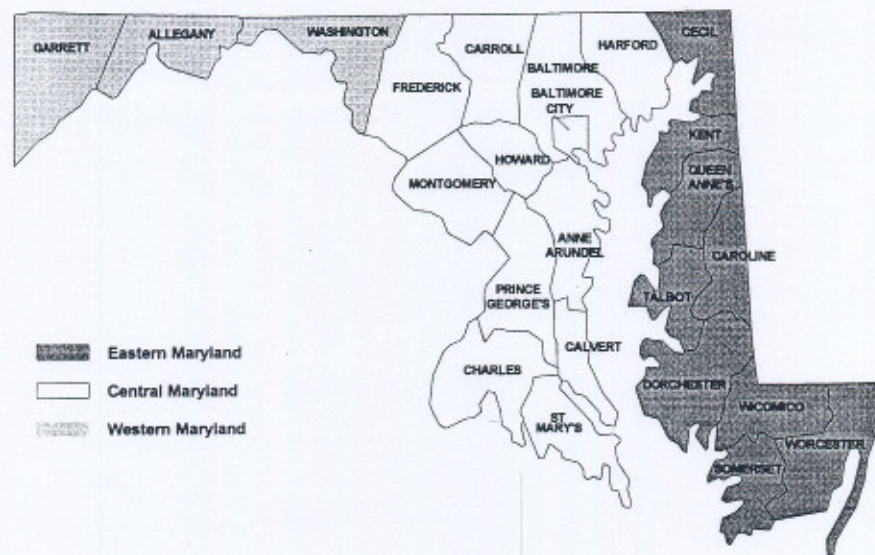
- ➔ Economic Activity (Output)
- ➔ Earnings (Payroll)
- ➔ Jobs

The total impacts include the aviation sector itself (i.e. the "direct and indirect impacts"), as well as the "multiplier effect" of the aviation sector. The impacts were estimated for the Year 1995.

All three indicators of economic impact are useful; however, the monetary measures should not be added together. The three impact measurements are explained below:

- ➔ **Economic Activity** - The value of the aviation final demand (aviation or airport service), plus the "multiplier" effect (the sum of all of the intermediate goods and services needed to produce the aviation final demand, plus the induced impacts of increased household consumption). Total economic activity equals the sum of intermediate demands, consumption demand, government demand, investment demand, and net export demand. Economic Activity is always larger than both the Direct and Indirect values because it includes the multiplier effect.
- ➔ **Earnings** - The sum of the wages and salaries to all employed persons that the aviation industry pays, directly or indirectly, to deliver the output of final aviation demand. Earnings Impacts are always included in the Economic Activity totals, so they should not be summed with the Economic Activity impact. Earnings are a very conservative proxy for "value added." Earnings may be greater or less than the Direct and Indirect values depending on the industry type.
- ➔ **Jobs** - The number of employees who are employed in the aviation industry, plus the aviation-oriented share of those that are employed in sectors that support the air passenger (hotels, restaurants, etc.) plus those employed in the industries included in the multiplier effect impacts. The number of jobs attributable to an industry is always greater than simply those in the industry itself, due to the "responding" of money.

Exhibit 5
MARYLAND REGIONAL IMPACT AREAS



2.6 Impact Measures and Types

These three impact "measures" and the three impact "types" explained earlier are interrelated. The economic activity, earnings and job impact measures comprise Direct, Indirect, and Multiplier impact types. The interaction of the three impact measures and their three impact types are presented below in Exhibit 6. The total economic activity, earnings and jobs impact measures presented in Chapter 3 are comprised of these three impact types.

Exhibit 6
ECONOMIC IMPACT TYPES and MEASURES

Impact Measures		
Economic Activity	Earnings	Jobs
+	Direct Impacts	
+	Indirect Impacts	
+	Multiplier Impacts	
=	Total Impacts	

Impact Types

2.7 Tax Impacts

Treatment of taxes in an economic impact analysis is an important issue requiring careful analysis. The taxes generated by the airport are important to the local community in that they help fund local services and infrastructure maintenance and development. For this reason it makes sense to estimate their magnitude.

However, in the true economic sense, taxation is an economic transfer from one entity to another, which does not involve the consumption of resources. It is only when those tax dollars are used, e.g. to pay salaries or build a school, that consumption occurs and an economic (as opposed to a financial) transaction occurs. So, for example, when an air passenger buys a gift, a portion of the expenditure is a tax payment. The RIMS-II model traces the flow of such taxes through the local economy. Hence, it is absolutely improper to list the taxes as an additional economic impact and to then add them to the other impacts -- to do so, is to double count.

Therefore, taxes are estimated and presented separately from the economic impacts. The estimated tax revenues should be viewed as a component of the total economic activity impacts.

2.8 Airports Studied

A total of 35 public-use airports were evaluated during the study. Of these, four offer both commercial passenger and general aviation service, while the other 31 are exclusively general aviation airports. The airports studied and their location is presented in Exhibit 7.

These 35 airports comprise a diverse mix of publicly and privately owned airports, as shown in Exhibit 8. The sixteen publicly owned airports comprise municipal, county, state and local airports. The other nineteen privately owned airports are open to the general public. The based aircraft, aircraft operations and enplaned passengers by airport are also presented in Exhibit 8. Review of aircraft operational data indicates:

- ✈ The top three airports in terms of based aircraft are: Martin State (302), Frederick (266) and Montgomery (241).
- ✈ The top three airports in terms of itinerant aircraft operations are: BWI (264,069), Martin State (76,155) and Easton (75,000).
- ✈ Annual enplanements range from a low of nearly 10,000 at Cumberland to nearly 6.6 million at BWI.

The relative size of each airport in terms of based aircraft is shown in Exhibit 9, and in terms of aircraft operations in Exhibit 10.

Exhibit 7 MARYLAND AIRPORTS

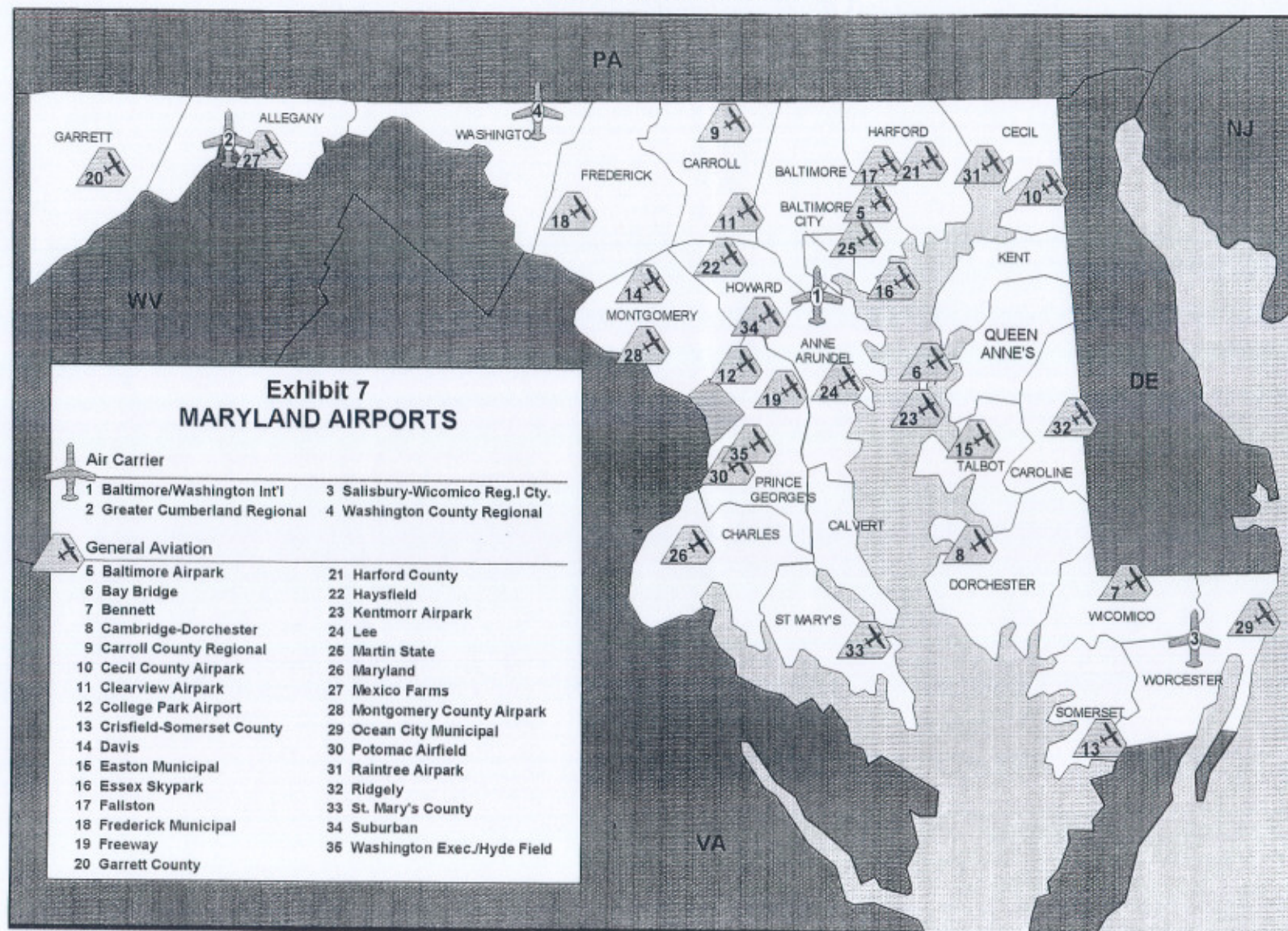


Exhibit 8
AIRPORT OWNERSHIP, BASED AIRCRAFT, AIRCRAFT OPERATIONS and ENPLANED PASSENGERS - 1995
Maryland Airports Economic Impact Study

AIRPORT	OWNERSHIP		BASED AIR- CRAFT /b	AIRCRAFT OPERATIONS /c			ENPLANED PASSENGERS
	Public /a	Private		Local /d	Itinerant /e	Total Ops.	
Commercial							
Baltimore/Washington Int'l	S	--	96	17,634	264,069	281,703	6,582,000
Grtr. Cumberland Reg. Aprt	C	--	53	10,500	12,082	22,582	9,700
Salisbury-Wicomico Co. Reg	C	--	139	24,000	75,720	99,720	63,748
Washington Co. Reg. Airport	C	--	191	19,995	41,644	61,639	33,344
Total Commercial	4	0	479	72,129	393,515	465,644	6,688,792
General Aviation							
Baltimore Airpark	--	X	21	2,000	1,020	3,020	na
Bay Bridge Airport	C	--	58	5,500	9,500	15,000	na
Bennett Airport	--	X	8	600	0	600	na
Cambridge-Dorchester Co.	C	--	27	6,327	2,594	8,921	na
Carroll County Reg.	C	--	119	105,000	20,350	125,350	na
Cecil County Airpark	--	X	17	2,750	1,320	4,070	na
Clearview Airpark	--	X	31	11,440	1,495	12,935	na
College Park Airport	NP	--	79	9,000	3,010	12,010	na
Crisfield-Somerset Airport	C	--	5	150	700	850	na
Davis Airport	--	X	45	15,000	175	15,175	na
Easton Muni. Airport	M	--	140	15,000	75,000	90,000	na
Essex Skypark	--	X	40	3,000	500	3,500	na
Fallston Airport	--	X	42	2,190	1,560	3,750	na
Frederick Muni. Airport	M	--	266	148,038	41,114	189,152	na
Freeway Airport	--	X	100	24,000	4,680	28,680	na
Garrett County Airport	C	--	18	1,000	1,500	2,500	na
Harford County Airport	--	X	47	15,600	2,675	18,275	na
Haysfield	--	X	50	4,800	0	4,800	na
Kentmorr Airpark	--	X	18	1,230	5,170	6,400	na
Lee Airport	--	X	131	10,000	6,200	16,200	na
Martin State Airport	S	--	302	48,214	76,155	124,369	na
Maryland Airport	--	X	75	15,000	10,400	25,400	na
Mexico Farms Airport	--	X	21	3,900	800	4,700	na
Montgomery County Airpark	C	--	241	61,500	48,805	110,305	na
Ocean City Muni. Airport	M	--	27	6,000	736	6,736	na
Potomac Airpark	--	X	103	45,000	600	45,600	na
Raintree Airpark	--	X	19	5,304	1,158	6,462	na
Ridgely Airpark	--	X	15	7,286	10,090	17,376	na
Saint Mary's County Airport	C	--	82	38,316	18,135	56,451	na
Suburban Airport	--	X	65	20,000	410	20,410	na
Washington Ex./ Hyde Field	--	X	129	91,000	1,200	92,200	na
Total Gen. Aviation	12	19	2,341	724,145	347,052	1,071,197	na
Total Commercial & GA	16	19	2,820	796,274	740,567	1,536,841	6,688,792

SOURCE: Wilbur Smith Associates, the Maryland Aviation Administration, the Federal Aviation Administration and individual airport managers.

/a C" denotes County; "M" denotes Municipal; "NP" denotes National Capital Park and Planning Commission; and "S" denotes State.

/b Includes fixed wing and helicopter, but excludes ultra-lights. See Appendix Exhibit A-1 for breakdown by aircraft type

/c One aircraft landing and one take-off equals two aircraft operations.

/d Local operations occur when an aircraft takes-off and lands at the same airport.

/e Itinerant operations occur when an aircraft takes-off from one airport and lands at another airport. Includes air carrier, commuter, air taxi, military and GA Itinerant operations - see Appendix A-3 for breakdown.

Exhibit 9
MARYLAND BASED AIRCRAFT

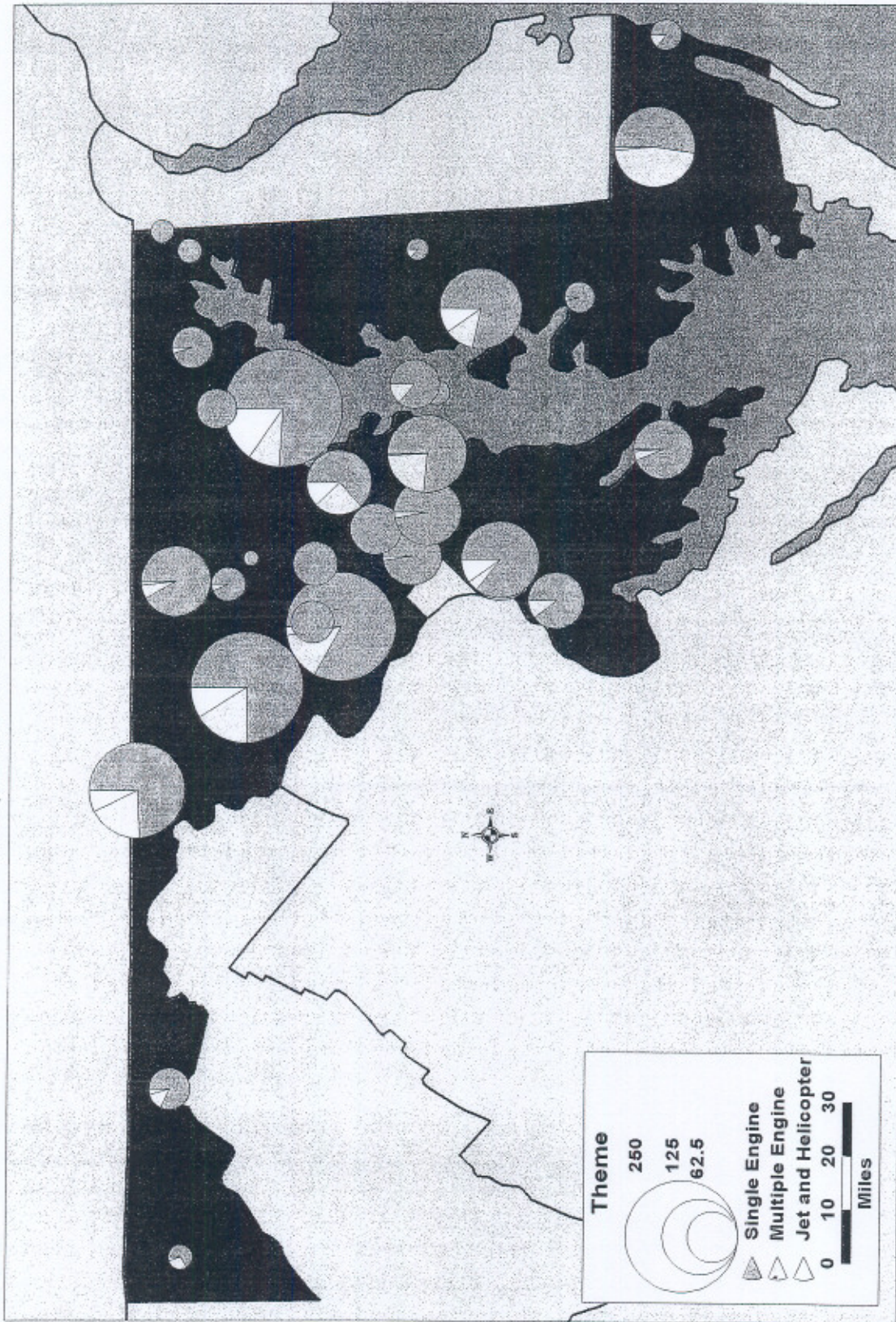
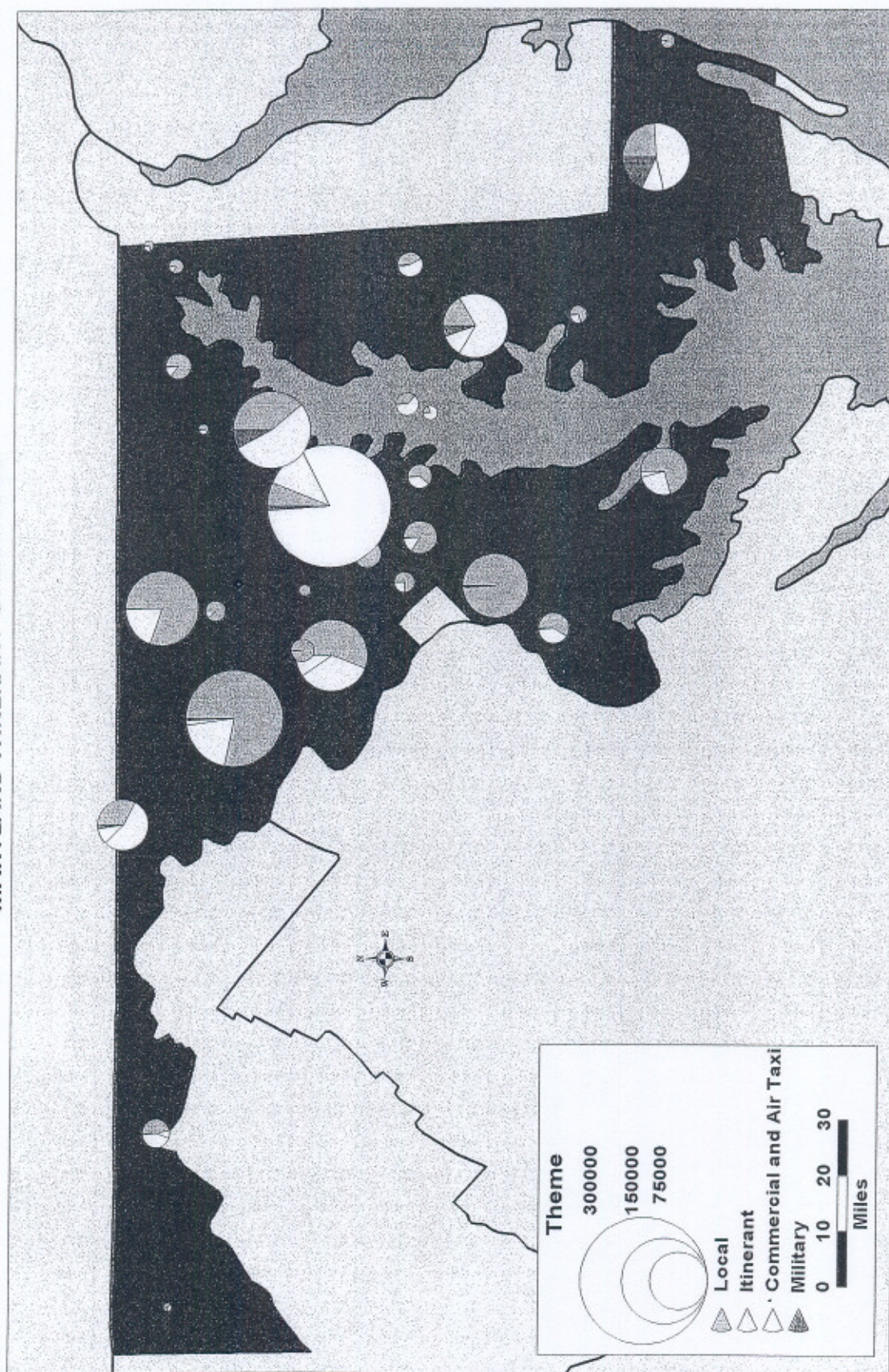


Exhibit 10
MARYLAND ITINERANT OPERATIONS



Chapter 3

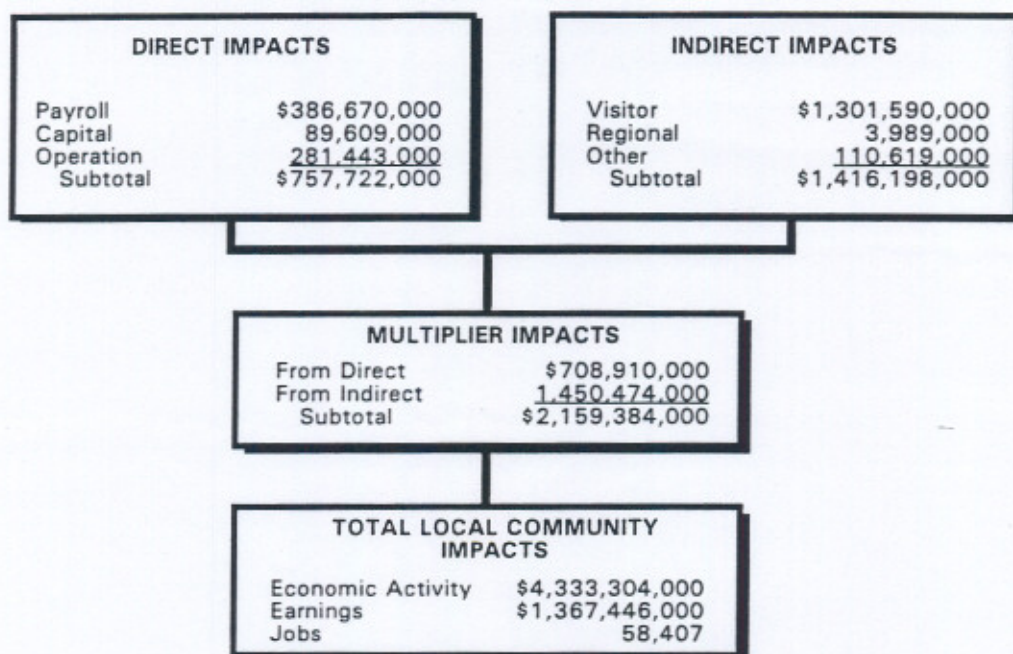
MARYLAND AIRPORTS ECONOMIC IMPACTS

The detailed investigations of aviation activity conducted at Maryland's airports indicate that the combined annual economic impacts of the airport's operation, visitors and multiplier effect on their local communities amounts to \$4.3 billion in economic activity, of which \$1.4 billion is paid in earnings to 58,407 jobs. The following discussion details the components of these impacts.

3.1 Aviation Impact Overview

Exhibit 11 lists the estimated \$4.3 billion in total annual economic activity impacts by major impact type. The total comprises \$757.7 million in direct impacts, \$1.4 billion in indirect impacts, and multiplier impacts of \$2.2 billion. These are the "local area" impacts which reasonably can be attributed to aviation activities at Maryland's airports. These impacts are due to the "direct" provision of aviation services, the "indirect" use of aviation services, and the "induced" multiplier effect of subsequent transactions in the communities that surround each of the study airports.

Exhibit 11
ECONOMIC IMPACT SUMMARY
Baltimore / Washington International Airport, 1995

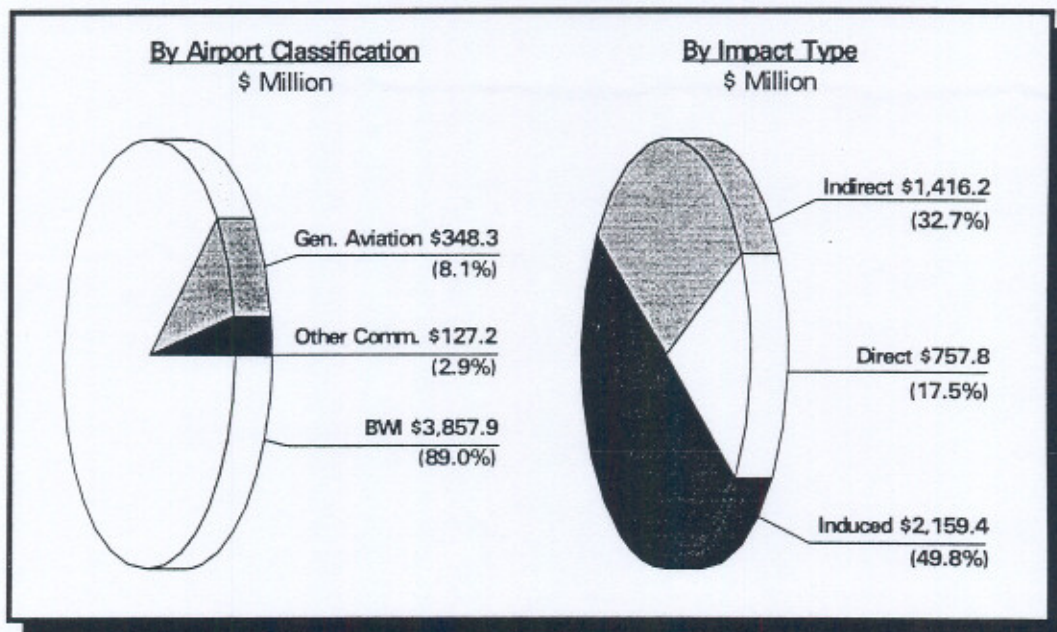


Airport Impacts on Local Communities - Each airport in Maryland has some economic value to the area that it serves and the area in which the airport's employees live. BWI impacts a very large area of Maryland, while the smaller general aviation airports tend to impact much smaller areas (only the communities near the airport). The surveys, interviews and airport visits helped to determine the extent of the airports' impacts on their surrounding communities (i.e. the airport's "local" impact area).

The estimated total economic activity impacts for all 35 public-use airports studied is presented by major impact category in Exhibits 12. The tabulation reveals the following:

- ➔ All 35 airports have quantifiable economic impacts on their surrounding areas.
- ➔ Direct impacts, associated with the provision of aviation services, make up 17.5 percent of total aviation-related expenditure impacts;
- ➔ Indirect impacts, associated with the use of aviation services, account for 32.7 percent of the total;
- ➔ Induced impacts, arising from the multiplier effect, are 49.8 percent of the total. This means that almost half of the airport's aviation-related impacts accrue to people in the region who are neither suppliers nor users of aviation services and who may not perceive themselves as benefiting from the airports.
- ➔ Air carrier airports have an economic activity impact of \$4.0 billion, with BWI accounting for \$3.9 billion (89.0%) of the total expenditure impacts.
- ➔ The State's general aviation airports had an economic activity impact of \$348.3 million, or 8.1 percent of the total expenditure impacts.

Exhibit 12
ECONOMIC ACTIVITY IMPACT BREAKDOWNS
By Airport Classification and By Impact Type



The total economic impacts that each individual airport generates on their respective local communities are summarized by airport in Exhibit 13. The three "impact types" (direct, indirect and multiplier) detail the nature of the expenditures shown in the "economic activity" impact measure. The "earnings" impact measure reflects that amount of economic activity spent on wages and salaries. And, the "jobs" measure reflects the corresponding full-time equivalent jobs associated with the earnings impacts.

3.2 Direct Impacts

The \$757.7 million in direct impacts are caused by the firms and agencies located at the airports who provide aviation services. These at-airport impacts are presented by expense type in Exhibit 14.

The tabulation reveals that payroll to people who work at the airports totals \$386.7 million annually. This payroll goes to the estimated 10,951 full time equivalent jobs at the airport (where two part-time jobs comprise one full-time job). Many of these jobs are high paying, with the average direct aviation employee earning an annual salary of \$35,309.

The \$89.6 million in "capital impacts" comprise capital investments made in which the recipient of the expenditures is located in the region. Capital investment represents physical improvements to airport facilities, either public or private. Funds may come from private sources, such as the leaseholders who build air cargo transshipment facilities at BWI, or from government agencies such as the Maryland Aviation Administration (MAA), the Federal Aviation Administration (FAA), or the local county or municipal governments. The estimated capital expenditures represent an average of several years. This is because the measurement of all new runway or terminal construction projects during a single year would exaggerate an airport's typical annual impacts (since these facilities are used over many years). Similarly, to exclude the major construction projects would under estimate an airport's economic impact. For this reason, the total capital costs evaluated in this study typically comprise an annual average of the capital costs over the past ten years. The annual average estimation approach better reflects the typical annual impact that large capital investment projects have on the local community.

The \$281.4 million in "operation expenses" include expenditures by firms that pay for local utilities, operations, parts and supplies, services and other local purchases. All of these are of economic value to the airports' service regions. It is recognized that often a significant proportion of these operation expenses are made by one airport business to another at-airport business. To include one at-airport firm's operation expense which lead to another at-airport firm's revenues would be to double count the expenditure's economic impact. For this reason, expenditures made from one firm at the airport to another firm at the airport are excluded.

Exhibit 13
AIRPORT ECONOMIC IMPACT SUMMARY on LOCAL COMMUNITIES - 1995
Maryland Airports Economic Impact Study

AIRPORT	IMPACT TYPES			IMPACT MEASURES /a		
	Final Demand Impacts		Multiplier Impacts /a (\$000s)	Local Econ. Act. (\$000s)	Local Earnings (\$000s)	Local Jobs
	Direct (\$000s)	+ Indirect (\$000s)				
Commercial						
Baltimore/Washington Int'l	\$596,139	\$1,314,207	\$1,947,531	\$3,857,877	\$1,225,991	53,170
Grtr. Cumberland Reg. Arpt	2,740	2,015	2,598	7,353	2,135	84
Salisbury-Wicomico Co. Reg.	25,678	15,252	30,185	71,115	22,295	868
Washington Co. Reg. Arpt	24,204	7,918	16,547	48,669	14,212	528
Total Commercial	\$648,761	\$1,339,392	\$1,996,861	\$3,985,014	\$1,264,634	54,650
General Aviation						
Baltimore Airpark	\$285	\$7	\$263	\$555	\$163	6
Bay Bridge Airport	766	345	744	1,855	562	22
Bennett Airport	50	0	30	80	23	0
Cambridge-Dorchester Co.	900	31	526	1,457	395	14
Carroll County Reg.	2,489	40,511	34,610	77,610	20,522	740
Cecil County Airpark	65	8	41	114	31	1
Clearview Airpark	164	5	155	324	96	3
College Park Airport	966	48	851	1,865	556	19
Crisfield-Somerset Airport	27	15	30	72	22	1
Davis Airport	136	27	161	324	99	4
Easton Muni. Airport	6,047	1,942	5,161	13,150	3,899	146
Essex Skypark	210	13	204	427	127	5
Fallston Airport	40	0	35	75	22	1
Frederick Muni. Airport	6,365	24,341	29,495	60,201	19,897	839
Freeway Airport	1,265	37	1,205	2,507	743	25
Garrett County Airport	424	206	368	998	300	10
Harford County Airport	560	17	529	1,106	322	11
Haysfield	25	0	23	48	14	0
Kentmorr Airpark	10	78	64	152	49	2
Lee Airport	673	130	760	1,563	470	17
Martin State Airport	76,853	3,942	72,932	153,727	45,349	1,534
Maryland Airport	547	88	621	1,256	377	13
Mexico Farms Airport	12	22	21	55	17	0
Montgomery County Airpark	4,017	3,438	7,350	14,805	4,622	186
Ocean City Muni. Airport	975	234	788	1,997	594	25
Potomac Airpark	848	6	791	1,645	487	17
Raintree Airpark	122	26	86	234	65	3
Ridgely Airpark	165	135	209	509	159	7
Saint Mary's County Airport	2,241	975	3,075	6,291	1,915	72
Suburban Airport	280	32	267	579	167	6
Washington Ex./ Hyde Field	1,434	147	1,129	2,710	751	28
Total Gen. Aviation	\$108,961	\$76,806	\$162,523	\$348,290	102,812	3,757
Total Commercial & GA	\$757,722	\$1,416,198	\$2,159,384	\$4,333,304	1,367,446	58,407

SOURCE: Wilbur Smith Associates and the Bureau of Economic Analysis

/a Includes the multiplier impacts that accrue within each airport's general service region (i.e. Eastern MD, Central MD & Western MD)

Exhibit 14
AIRPORT DIRECT ECONOMIC IMPACTS - 1995
Maryland Airports Economic Impact Study

AIRPORT	DIRECT JOBS /a	DIRECT EXPENDITURES (\$000s)			Total
		Payroll	Capital	Operations	
Commercial					0
Baltimore/Washington Int'l	8,037	\$301,590	\$79,111	\$215,438	\$596,139
Grtr. Cumberland Reg. Arpt	43	1,430	458	852	2,740
Salisbury-Wicomico Co. Reg.	607	17,641	750	7,287	25,678
Washington Co. Reg. Arpt	369	12,652	785	10,767	24,204
Total Commercial	9,056	\$333,313	\$81,104	\$234,344	\$648,761
General Aviation					
Baltimore Airpark	5	\$130	—	\$155	\$285
Bay Bridge Airport	12	235	246	285	766
Bennett Airport	—	—	—	50	50
Cambridge-Dorchester Co.	10	285	165	450	900
Carroll County Reg.	15	295	1,675	519	2,489
Cecil County Airpark	1	15	—	50	65
Clearview Airpark	3	70	14	80	164
College Park Airport	14	391	125	450	966
Crisfield-Somerset Airport	1	12	—	15	27
Davis Airport	2	60	46	30	136
Easton Muni. Airport	104	2,493	597	2,957	6,047
Essex Skypark	3	82	—	128	210
Fallston Airport	0	0	34	6	40
Frederick Muni. Airport	126	2,527	890	2,948	6,365
Freeway Airport	17	480	100	685	1,265
Garrett County Airport	5	140	198	86	424
Harford County Airport	7	250	10	300	560
Haysfield	—	—	—	25	25
Kentmorr Airpark	—	—	4	6	10
Lee Airport	12	320	25	328	673
Martin State Airport	1,371	41,357	3,160	32,336	76,853
Maryland Airport	8	218	15	314	547
Mexico Farms Airport	—	—	—	12	12
Montgomery County Airpark	77	1,576	591	1,850	4,017
Ocean City Muni. Airport	15	272	220	483	975
Potomac Airpark	13	358	71	419	848
Raintree Airpark	3	55	—	67	122
Ridgely Airpark	3	35	100	30	165
Saint Mary's County Airport	42	966	172	1,103	2,241
Suburban Airport	5	135	—	145	280
Washington Ex./ Hyde Field	21	600	47	787	1,434
Total Gen. Aviation	1,895	\$53,357	\$8,505	\$47,099	\$108,961
Total Commercial & GA	10,951	\$386,670	\$89,609	\$281,443	\$757,722

SOURCE: Wilbur Smith Associates

a/ Reported as full-time equivalent jobs (FEQ), in which two part time jobs equal one FEQ job

3.3 Indirect Impacts

The estimated \$1,416 million in aviation "indirect" impacts at Maryland's Airports are shown by impact cause in Exhibit 15. These estimates represent the impacts identified as attributable to each airport's use by local businesses, residents and visitors.

Visitor Expenditures - The "Visitor Expenditures" represent monies spent in the region by visitors who arrived via Maryland airports. Expenditures by such visitors comprise 91.9 percent of the indirect impacts and illustrate the importance of tourism and business visitors to the airport service areas. The visitor expenditure estimates are based on previous visits to the airports during the 1989 study, discussions with the airport managers, and from other study findings of commercial service and general aviation service air passenger surveys.

At the BWI Airport, these sources were used to estimate the percentage of airport users who are visitors, how long the visitors typically stay, how much money they spend per trip, and what they spend it on. This information was supplemented by MAA data and the "1992 Washington - Baltimore Regional Air Passenger Survey"⁵, which asked specific questions about BWI passenger travel patterns and expenditures.

Visitor impact estimates at the other commercial and general aviation airports were estimated in a similar manner in the earlier 1989 study. In this study update the visitor expenditures were adjusted to reflect changes in: consumer prices, enplaning air passengers (at commercial airports), itinerant and air taxi operations, and any notable change in the percent of corporate itinerant operations.

Regional Expenditures - The "Regional Expenditures" reflect the transportation expenditures of the residents who commute to and from Maryland's airports. These residents generate an additional \$4.0 million in local area impacts.

Other Expenditures - The "Other Expenditures" includes aviation-related expenditures in Maryland pertaining to off-airport businesses. These impacts predominantly consist of travel agency impacts at commercial passenger service airports. At BWI it also includes airline crew layover impacts of those airline crews based somewhere else, but who stay overnight in the BWI metropolitan area between flights. At Frederick, two firms⁶ located adjacent to the airport are considered "dependent" on the airport because of the aviation related nature of their businesses and therefore are included in the impact analysis. And at Carroll County, a large motor vehicle part manufacturer's impacts are included, since the manufacturer located adjacent to the airport due in large part to the airport's ability to provide direct runway access.

⁵1992 Washington - Baltimore Regional Air Passenger Survey, Metropolitan Washington Council of Governments in cooperation with the Metropolitan Washington Airports Authority, the Maryland Department of Transportation and the Virginia Department of Aviation.

⁶ The Aircraft Owners and Pilots Association (AOPA) and Avemco, an aviation insurance corporation.

Exhibit 15
AIRPORT INDIRECT ECONOMIC IMPACTS - 1995
Maryland Airports Economic Impact Study

AIRPORT	INDIRECT EXPENDITURES (\$000s)			
	<u>Visitor</u>	<u>Regional</u>	<u>Other</u>	<u>Total</u>
Commercial				
Baltimore/Washington Int'l	1,264,372	3,660	46,175	1,314,207
Grtr. Cumberland Reg. Aprt	1,864	6	145	2,015
Salisbury-Wicomico Co. Reg.	14,226	67	959	15,252
Washington Co. Reg. Arpt	<u>7,412</u>	<u>4</u>	<u>502</u>	<u>7,918</u>
Total Commercial	1,287,874	3,737	47,781	1,339,392
General Aviation				
Baltimore Airpark	7	—	—	7
Bay Bridge Airport	342	3	—	345
Bennett Airport	—	—	—	0
Cambridge-Dorchester Co.	30	1	—	31
Carroll County Reg.	307	15	40,189	40,511
Cecil County Airpark	6	2	—	8
Clearview Airpark	5	—	—	5
College Park Airport	48	—	—	48
Crisfield-Somerset Airport	15	—	—	15
Davis Airport	23	4	—	27
Easton Muni. Airport	1,933	9	—	1,942
Essex Skypark	10	3	—	13
Fallston Airport	—	—	—	0
Frederick Muni. Airport	1,668	24	22,649	24,341
Freeway Airport	30	7	—	37
Garrett County Airport	202	4	—	206
Harford County Airport	12	5	—	17
Haysfield	—	—	—	0
Kentmorr Airpark	78	—	—	78
Lee Airport	124	6	—	130
Martin State Airport	3,855	87	—	3,942
Maryland Airport	81	7	—	88
Mexico Farms Airport	18	4	—	22
Montgomery County Airpark	3,410	28	—	3,438
Ocean City Muni. Airport	232	2	—	234
Potomac Airpark	—	6	—	6
Raintree Airpark	23	3	—	26
Ridgely Airpark	135	—	—	135
Saint Mary's County Airport	959	16	—	975
Suburban Airport	28	4	—	32
Washington Ex./ Hyde Field	<u>135</u>	<u>12</u>	<u>—</u>	<u>147</u>
Total Gen. Aviation	\$13,716	\$252	\$62,838	\$76,806
Total Commercial & GA	\$1,301,590	\$3,989	\$110,619	\$1,416,198

SOURCE: Wilbur Smith Associates

Such access was viewed as a critical factor by the manufacturer, who often fulfills just-in-time part orders via air cargo planes to automobile manufacturers nationwide. In all, the other expenditures indirectly attributable to Maryland's airports totals \$110.6 million.

Non-Aviation Airport Tenants - Some Maryland airports lease buildings or office space to firms whose activities are not aviation-related and which, in reality, could be located anywhere. These airport tenants are important because they employ people, make local expenditures, make payments to the airport owner, etc. However, they are excluded from the aviation-related impacts because they do not depend upon the airport and presumably might be located elsewhere in the community, if the airport did not exist.

3.4 Multiplier Impacts

The "direct" and "indirect" economic impacts represent increases in final demand in the airport impact area. Such "final demand" increases, however, do not represent the total economic impact value attributable to Maryland's airports. Rather, there also exists a "multiplier" effect which must be derived and added to the final demand increases to attain the total economic impacts.

The multiplier impacts are derived from entering the direct and indirect impacts into the RIMS-II model, as derived by the Bureau of Economic Analysis. The RIMS-II model indicates that this annual multiplier expenditure impact totaled \$2,159,384,000. The total annual local economic activity impacts attributable to Maryland's Public use airports totaled \$4.3 billion, with \$1.4 billion paid in total earnings to the 58,407 total full-time equivalent jobs.

3.5 Impact/Aviation Activity Relationships

This study found that airports in Maryland perform many different roles. As a result, economic impacts are a function of many different activities, including:

- Number of visitors using the airport
- Number of based aircraft
- Annual aircraft operations
- Number of private firms providing aviation support services
- Number of jobs at the airport
- Number of corporate aircraft with paid crews
- Capital investment at the airport
- Types of firms at the airport
- Airport's aviation roles

As would be expected, the airport impacts generally are in proportion to each airport's size in terms of passengers, aircraft operations, and based aircraft. Nonetheless, the variety of activities conducted at the different airports demonstrate that economic impacts are not simply a function of any single event or characteristic. Rather, the impacts may vary considerably between airports of comparable size and/or activity levels. This is a result of the different combination of activities conducted at each airport. This section compares the

relationships, aircraft operations and based aircraft, and how these activities relate to local economic activity impact expenditures.

Relationship to Annual Aircraft Operations - The study found a general relationship between aircraft activity and economic impact. The two areas of aircraft activity studied are the number of: (1) itinerant aircraft operations and (2) total aircraft operations (itinerant plus local). These two areas provide general indicators of airport size, and bear some relationship to airport roles (business or recreational/instructional).

Exhibit 16 lists the total local economic impacts by airport per itinerant and total aircraft operation. General relationships exist between impact magnitude and the number of aircraft operations, which suggests an increase in economic impacts as both itinerant and total aircraft operations increase. (Note that the average impacts per total aircraft operation are always lower than per itinerant operation because total operations include both itinerant and local operations.) The average economic impact per thousand itinerant operations at Maryland's air carrier airports is \$10,808, versus \$1,090 at general aviation airports. The average impact is typically higher at the air carrier airports because the aircraft operations conducted by commercial airlines carry many visiting passengers per aircraft, and often require considerable direct impact support and service. This is especially evident at BWI, which accommodates the dominate share of the State's commercial passengers.

However, some general aviation airports generate higher impacts per itinerant operations than some commercial airports. Martin State, for example, is a major Air National Guard base as well as a reliever airport for BWI and a center of extensive civilian aviation activity. In addition, Potomac Airport exemplifies a well developed aviator enthusiast's airport that accommodates extensive local operations but few itinerant operations, thus the impact per itinerant operation is quite high versus the comparatively low impact per total operation. In summary, the general relationship between each airport's itinerant operations and economic activity is shown graphically in Exhibit 17⁷.

Relationship to the Number of Based Aircraft - A relationship also exists between each airport's economic impact and its number of based aircraft. Exhibit 18 lists this relationship by airport in terms of annual economic impact per based aircraft. Generally, the smallest airports (fewest based aircraft) also have the lowest impact per based aircraft; and the impact per based aircraft generally increases as the number of based aircraft increases. The impact per based aircraft at BWI, and to a lesser extent the other commercial service airports, is greatly exaggerated because the impacts include the air carrier scheduled service impacts while the based aircraft numbers refer only to general aviation. Excluding BWI, the average annual economic activity impact per based aircraft in Maryland is \$178,866. The relationship between based aircraft and economic activity impacts is shown graphically in Exhibit 19.

⁷ BWI and Martin State are not shown due to the significantly larger value of their impacts relative to the other airports.

Exhibit 16
AIRPORT ECONOMIC ACTIVITY IMPACTS Per AIRCRAFT OPERATION - 1995
Maryland Airports Economic Impact Study

AIRPORT	ECONOMIC ACTIVITY/a (\$000s)	AIRCRAFT OPERATIONS			ECO. ACTIVITY per 1,000 OPERS.	
		Local	Itinerant /b	Total	Itinerant	Total
Commercial						
Baltimore/Washington Int'l	\$3,857,877	17,634	261,663	279,297	\$14,744	\$13,813
Grtr. Cumberland Reg. Aprt	7,353	10,500	11,882	22,382	619	329
Salisbury-Wicomico Co. Reg.	71,115	24,000	60,520	84,520	1,175	841
Washington Co. Reg. Arpt	48,669	19,995	34,644	54,639	1,405	891
Total Commercial	\$3,985,014	72,129	368,709	440,838	\$10,808	\$9,040
General Aviation						
Baltimore Airpark	\$555	2,000	1,020	3,020	\$544	\$184
Bay Bridge Airport	1,855	5,500	9,500	15,000	195	124
Bennett Airport	80	600	0	600	na	134
Cambridge-Dorchester Co.	1,457	6,327	2,594	8,921	561	163
Carroll County Reg.	77,610	105,000	20,300	125,300	3,823	619
Cecil County Airpark	114	2,750	1,320	4,070	86	28
Clearview Airpark	324	11,440	1,495	12,935	217	25
College Park Airport	1,865	9,000	3,010	12,010	620	155
Crisfield-Somerset Airport	72	150	588	738	122	98
Davis Airport	324	15,000	175	15,175	1,851	21
Easton Muni. Airport	13,150	15,000	75,000	90,000	175	146
Essex Skypark	427	3,000	500	3,500	854	122
Fallston Airport	75	2,190	1,560	3,750	48	20
Frederick Muni. Airport	60,201	148,038	41,114	189,152	1,464	318
Freeway Airport	2,507	24,000	4,680	28,680	536	87
Garrett County Airport	998	1,000	1,500	2,500	666	399
Harford County Airport	1,106	15,600	2,575	18,175	430	61
Haysfield	48	4,800	0	4,800	na	10
Kentmorr Airpark	152	1,230	5,170	6,400	29	24
Lee Airport	1,563	10,000	6,200	16,200	252	96
Martin State Airport	153,727	48,214	58,693	106,907	2,619	1,438
Maryland Airport	1,256	15,000	10,400	25,400	121	49
Mexico Farms Airport	55	3,900	800	4,700	69	12
Montgomery County Airpark	14,805	61,500	48,805	110,305	303	134
Ocean City Muni. Airport	1,997	6,000	706	6,706	2,829	298
Potomac Airpark	1,645	45,000	600	45,600	2,742	36
Raintree Airpark	234	5,304	1,158	6,462	202	36
Ridgely Airpark	509	7,286	9,990	17,276	51	29
Saint Mary's County Airport	6,291	38,316	18,135	56,451	347	111
Suburban Airport	579	20,000	410	20,410	1,412	28
Washington Ex./ Hyde Field	2,710	91,000	1,200	92,200	2,258	29
Total Gen. Aviation	\$348,290	724,145	329,198	1,053,343	\$1,058	\$331
Total Commercial & GA	\$4,333,304	796,274	697,907	1,494,181	\$6,209	\$2,900
Total Excluding BWI	\$475,427	778,640	436,244	1,214,884	\$1,090	\$391

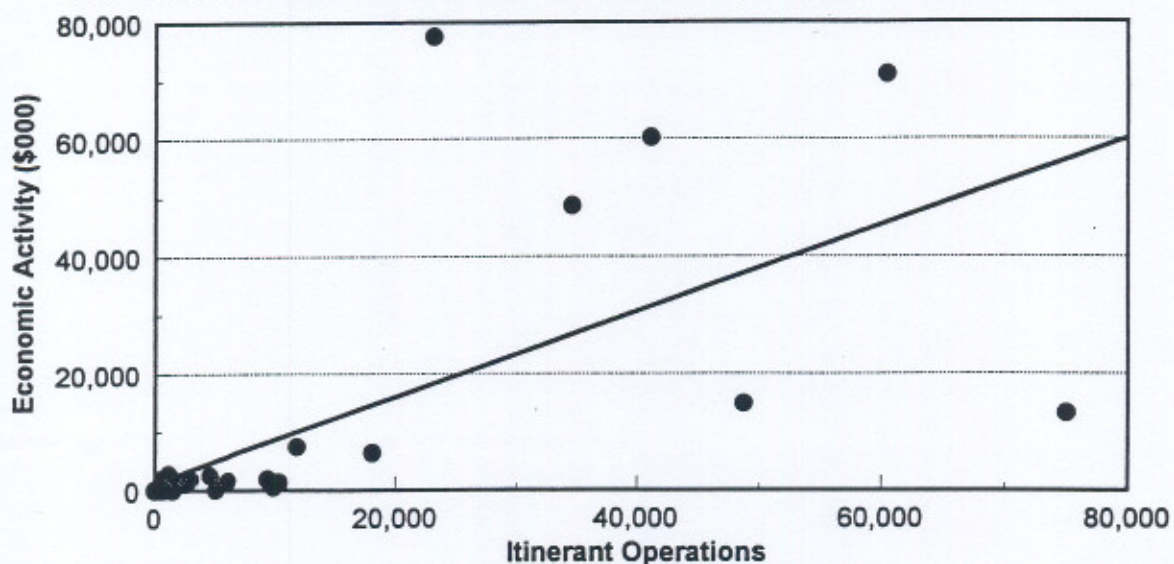
SOURCE: Wilbur Smith Associates and the Bureau of Economic Analysis

/a Includes the multiplier impacts that accrue within each airport's general service region (i.e. Eastern MD, Central MD & Western MD)

/b Military operations not included, because no military impacts are assessed. Martin state is the sole exception, since the MDANG military unit is stationed at the airport.

Exhibit 17

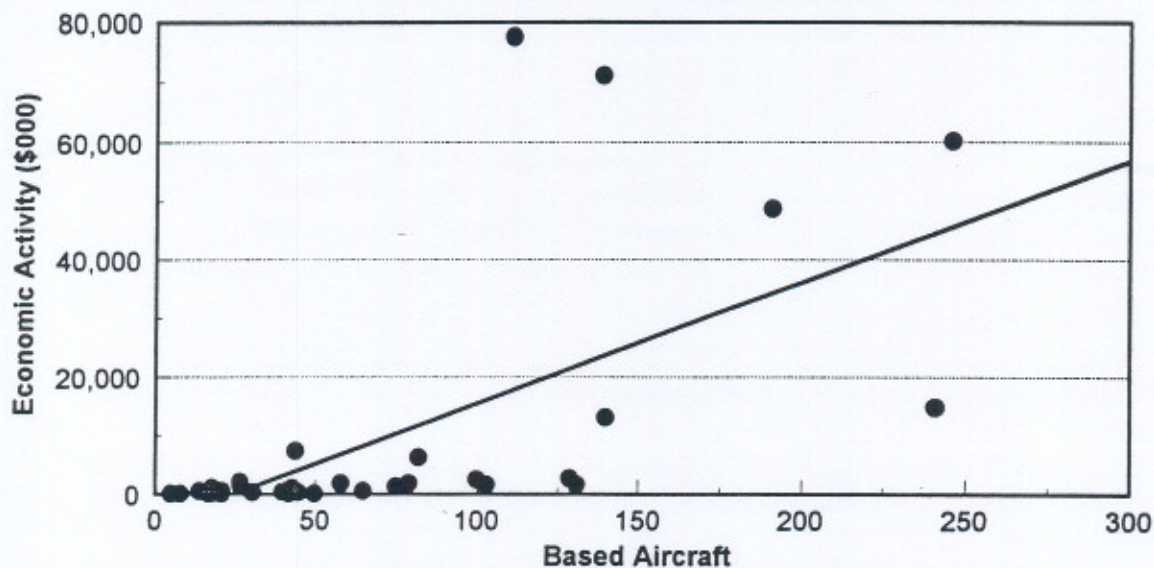
AIRPORT LOCAL ECONOMIC ACTIVITY IMPACTS per ITINERANT OPERATION



Note: BWI and Martin State are not shown since their economic activity impacts are significantly higher those airports shown.

Exhibit 19

AIRPORT LOCAL ECONOMIC ACTIVITY IMPACTS per BASED AIRCRAFT



Note: BWI and Martin State are not shown since their economic activity impacts are significantly higher those airports shown.

Exhibit 18
AIRPORT ECONOMIC ACTIVITY IMPACTS Per BASED AIRCRAFT - 1995
Maryland Airports Economic Impact Study

AIRPORT	ECONOMIC ACTIVITY/a (\$000s)	BASED AIRCRAFT /b	ECO. ACTIVITY IMPACT per BASED AIRCRAFT
Commercial			
Baltimore/Washington Int'l	\$3,857,877	96	\$40,186,219
Grtr. Cumberland Reg. Arpt	7,353	44	167,105
Salisbury-Wicomico Co. Reg.	71,115	139	511,619
Washington Co. Reg. Arpt	48,669	191	254,814
Total Commercial	\$3,985,014	470	\$8,478,753
General Aviation			
Baltimore Airpark	\$555	21	\$26,429
Bay Bridge Airport	1,855	58	31,983
Bennett Airport	80	8	10,050
Cambridge-Dorchester Co.	1,457	27	53,944
Carroll County Reg.	77,610	119	652,185
Cecil County Airpark	114	17	6,706
Clearview Airpark	324	31	10,452
College Park Airport	1,865	79	23,604
Crisfield-Somerset Airport	72	5	14,400
Davis Airport	324	45	7,200
Easton Muni. Airport	13,150	140	93,929
Essex Skypark	427	40	10,675
Fallston Airport	75	42	1,786
Frederick Muni. Airport	60,201	246	244,721
Freeway Airport	2,507	100	25,067
Garrett County Airport	998	18	55,461
Harford County Airport	1,106	43	25,721
Haysfield	48	50	952
Kentmorr Airpark	152	18	8,433
Lee Airport	1,563	131	11,927
Martin State Airport	153,727	271	567,258
Maryland Airport	1,256	75	16,744
Mexico Farms Airport	55	21	2,619
Montgomery County Airpark	14,805	241	61,432
Ocean City Muni. Airport	1,997	27	73,963
Potomac Airpark	1,645	103	15,973
Raintree Airpark	234	18	12,983
Ridgely Airpark	509	14	36,386
Saint Mary's County Airport	6,291	82	76,720
Suburban Airport	579	65	8,908
Washington Ex./ Hyde Field	2,710	129	21,009
Total Gen. Aviation	\$348,290	2,284	\$152,491
Total Commercial & G/A	\$4,333,304	2,754	\$1,573,458
Total Excluding BWI	\$475,427	2,658	\$178,866

SOURCE: Wilbur Smith Associates and the Bureau of Economic Analysis

/a Includes the multiplier impacts that accrue within each airport's general service region (i.e. Eastern MD, Central MD & Western MD)

3.6 Total Employment and Earnings Impacts

A major component of the total impacts are the jobs which the Airport creates and the payroll earned by these employees. In total, this study finds that Maryland's public-use airports create 58,339 full-time equivalent jobs (FEQ) in their local communities, with an annual payroll of \$1.4 billion. These job and earnings impact totals, as shown by airport in Exhibit 20, include the "direct" impacts that occur at the airports, and the "indirect" and "multiplier" impacts that arise throughout each airport's service area.

The airport surveys used to estimate the expenditure impacts of firms and agencies located at the airports also was used to estimate the total number of jobs *directly* associated with the Airport. These "direct" jobs by airport are presented in terms of full-time equivalent jobs by airport in Exhibit 15, and indicate that an estimated 10,951 FEQ jobs exist at Maryland's airports. A distinct majority of these direct FEQ jobs (8,037) occur at BWI, with 2,914 FEQ jobs occurring at Maryland's other public-use general aviation and commercial airports. The average payroll of these direct FEQ jobs is approximately \$37,500 at BWI and \$29,200 at the other airports.

In addition to these "direct" jobs, other jobs arise in the area due to the large number of visitors who arrive via the Airport, and through the "multiplier" impacts. In total, other area jobs that arise due to the existence and operation of Maryland's public-use airports total 47,456 for a total job impact of 58,407. These other jobs arise at the restaurants, hotels and other establishments that serve air passengers, as well as through the multiplier job impacts that serve the "direct" and "indirect" impacted participants. The large difference between the total jobs attributable to the airports' existence (i.e. total jobs) versus the number of jobs associated with providing aviation service (i.e. direct jobs) dramatizes how many other people are impacted by the airports' existence, even if they do not fly or work at Maryland's airports.

3.7 Maryland Airports Statewide Impacts

The RIMS-II multiplier coefficients for the entire State of Maryland also were purchased from the Bureau of Economic Analysis and applied to the "direct" and "indirect" impacts to ascertain what additional impacts accrue to the area over and above those in each airport's local community. The model indicates that the entire annual economic activity impacts in Maryland attributable to public-use airports totaled \$4.5 billion, with \$1.4 billion paid in total earnings to the 60,092 total full-time equivalent jobs as shown by airport in Exhibit 21. This suggests that an additional \$136.5 million in total annual economic activity arises outside of the airports' local communities. Similarly, an additional 1,685 people owe their livelihood to Maryland's public-use airports. A comparison of the total local impacts versus the entire State impacts is summarized in Exhibit 22.

Exhibit 20
AIRPORT EMPLOYMENT and EARNINGS IMPACTS - 1995
Maryland Airports Economic Impact Study

AIRPORT	DIRECT		INDIRECT & INDUCED		TOTAL	
	Jobs /a	Earnings (\$000s)	Jobs /a	Earnings (\$000s)	Jobs /a	Earnings (\$000s)
Commercial						
Baltimore/Washington Int'l	8,037	\$301,590	45,133	\$924,401	53,170	\$1,225,991
Grtr. Cumberland Reg. Arpt	43	1,430	41	705	84	2,135
Salisbury-Wicomico Co. Reg.	607	17,641	261	4,654	868	22,295
Washington Co. Reg. Arpt	369	12,652	159	1,560	528	14,212
Total Commercial	9,056	\$333,313	45,594	\$931,321	54,650	\$1,264,634
General Aviation						
Baltimore Airpark	5	\$130	1	\$33	6	\$163
Bay Bridge Airport	12	235	10	327	22	562
Bennett Airport	—	—	0	23	0	23
Cambridge-Dorchester Co.	10	285	4	110	14	395
Carroll County Reg.	15	295	725	20,227	740	20,522
Cecil County Airpark	1	15	0	16	1	31
Clearview Airpark	3	70	0	26	3	96
College Park Airport	14	391	5	165	19	556
Crisfield-Somerset Airport	1	12	0	10	1	22
Davis Airport	2	60	2	39	4	99
Easton Muni. Airport	104	2,493	42	1,406	146	3,899
Essex Skypark	3	82	2	45	5	127
Fallston Airport	0	0	1	22	1	22
Frederick Muni. Airport	126	2,527	713	17,369	839	19,897
Freeway Airport	17	480	8	263	25	743
Garrett County Airport	5	140	5	160	10	300
Harford County Airport	7	250	4	72	11	322
Haysfield	—	—	0	14	0	14
Kentmorr Airpark	—	—	2	49	2	49
Lee Airport	12	320	5	150	17	470
Martin State Airport	1,371	41,357	163	3,992	1,534	45,349
Maryland Airport	8	218	5	159	13	377
Mexico Farms Airport	—	—	0	17	0	17
Montgomery County Airpark	77	1,576	109	3,046	186	4,622
Ocean City Muni. Airport	15	272	10	322	25	594
Potomac Airpark	13	358	4	129	17	487
Raintree Airpark	3	55	0	10	3	65
Ridgely Airpark	3	35	4	124	7	159
Saint Mary's County Airport	42	966	30	949	72	1,915
Suburban Airport	5	135	1	32	6	167
Washington Ex./ Hyde Field	21	600	7	151	28	751
Total Gen. Aviation	1,895	\$53,357	1,862	\$49,455	3,757	\$102,812
Total Commercial & GA	10,951	\$386,670	47,456	\$980,775	58,407	\$1,367,446
Total Comm. & GA Excl. BWI	2,914	\$85,080	2,323	\$56,374	5,237	\$141,455

SOURCE: Wilbur Smith Associates and the Bureau of Economic Analysis

/a Jobs expressed as "Full-Time Equivalent" jobs, i.e. two part-time jobs equal one full-time job.

Exhibit 21
AIRPORT ECONOMIC IMPACT SUMMARY on The STATE of MARYLAND - 1995
Maryland Airports Economic Impact Study

AIRPORT	IMPACT TYPES			TOTAL IMPACT MEASURES /a		
	Final Demand Impacts		Multiplier Impacts /a (\$000s)	State Econ. Act. (\$000s)	State Earnings (\$000s)	State Jobs
	Direct (\$000s)	Indirect (\$000s)				
Commercial						
Baltimore/Washington Int'l	\$596,139	\$1,314,207	\$2,044,481	\$3,954,827	\$1,251,995	\$54,411
Grtr. Cumberland Reg. Aprt	2,740	2,015	4,733	9,488	2,845	112
Salisbury-Wicomico Co. Reg.	25,678	15,252	43,787	84,717	26,793	1,030
Washington Co. Reg. Arpt	<u>24,204</u>	<u>7,918</u>	<u>29,900</u>	<u>62,022</u>	<u>18,404</u>	<u>674</u>
Total Commercial	\$648,761	\$1,339,392	\$2,122,901	\$4,111,054	\$1,300,037	\$56,227
General Aviation						
Baltimore Airpark	\$285	\$7	\$270	\$562	\$165	6
Bay Bridge Airport	766	345	1,138	2,249	692	25
Bennett Airport	50	0	47	97	28	0
Cambridge-Dorchester Co.	900	31	833	1,764	500	17
Carroll County Reg.	2,489	40,511	36,448	79,448	20,995	762
Cecil County Airpark	65	8	65	138	39	1
Clearview Airpark	164	5	160	329	97	3
College Park Airport	966	48	969	1,983	588	20
Crisfield-Somerset Airport	27	15	40	82	25	1
Davis Airport	136	27	166	329	101	4
Easton Muni. Airport	6,047	1,942	7,844	15,833	4,785	174
Essex Skypark	210	13	210	433	128	5
Fallston Airport	40	0	37	77	22	1
Frederick Muni. Airport	6,365	24,341	30,640	61,346	20,185	853
Freeway Airport	1,265	37	1,227	2,529	747	25
Garrett County Airport	424	206	648	1,278	393	13
Harford County Airport	560	17	554	1,131	331	11
Haysfield	25	0	23	48	14	0
Kentmorr Airpark	10	78	97	185	60	2
Lee Airport	673	130	771	1,574	471	17
Martin State Airport	76,853	3,942	75,177	155,972	45,873	1,564
Maryland Airport	547	88	647	1,282	386	13
Mexico Farms Airport	12	22	27	61	20	0
Montgomery County Airpark	4,017	3,438	7,585	15,040	4,646	188
Ocean City Muni. Airport	975	234	1,204	2,413	731	26
Potomac Airpark	848	6	803	1,657	489	17
Raintree Airpark	122	26	144	292	88	3
Ridgely Airpark	165	135	322	622	195	7
Saint Mary's County Airport	2,241	975	3,144	6,360	1,928	72
Suburban Airport	280	32	281	593	171	6
Washington Ex./ Hyde Field	<u>1,434</u>	<u>147</u>	<u>1,510</u>	<u>3,091</u>	<u>922</u>	<u>29</u>
Total Gen. Aviation	\$108,961	\$76,806	\$173,027	\$358,794	\$105,814	\$3,865
Total Commercial & GA	\$757,722	\$1,416,198	\$2,295,928	\$4,469,848	\$1,405,851	\$60,092

SOURCE: Wilbur Smith Associates and the Bureau of Economic Analysis

/a Includes the multiplier impacts that accrue within each airport's general service region the entire state of Maryland

Exhibit 22
TOTAL AIRPORT ECONOMIC IMPACTS - LOCAL AREA vs. STATE of MARYLAND
Maryland Public-Use Airports, 1995

IMPACT MEASURE	Local Area Impacts/1	The State of Maryland	Difference	
			Amount	Percent
Economic Activity (\$000)	\$4,333,304	\$4,469,848	\$136,544	3.2%
Earnings (\$000)	\$1,367,446	\$1,405,851	\$38,405	2.8%
Jobs	58,407	60,092	1,685	2.9%

Source: Wilbur Smith Associates and the Bureau of Economic Analysis.

1/ Local Area Impacts include those impacts that occur within each airports service area. These service areas are defined as Eastern Maryland, Central Maryland and Western Maryland.

3.8 Economic Impacts by Industry Type

Firms and people who use the airports, and/or those who are involved in the provision of aviation services and airport facilities, benefit directly from aviation. But this study shows that many others also benefit from the airports -- even if they have never been at the airport or on an aircraft. The multiplier impact demonstrates how the initial aviation expenditures made at the airport, by visitors and by dependent businesses, are respended in the local economy, and how local businesses in the area support the final demand expenditures.

By tracing the flow of money through the State's economy it is possible to determine who benefits from the airports, by industry type. Exhibit 23 summarizes this calculation for Maryland's public-use airports. The table shows that all industry types benefit. Those that benefit the most are the obvious industry types:

- ➔ Lodging, Amusements -- the hotels and attractions that accommodate and entertain the aviation travelers during their visits.
- ➔ Eating and Drinking Establishments -- the restaurants that serve the air passengers and pilots.
- ➔ Transportation Industry -- the airlines, aircraft support firms, fixed base operators, flight and ground schools, automobile rental agencies, etc.
- ➔ Retail Trade -- the firms that sell goods to the aviation industry workers as well as to the air passenger visitors who arrive by air.
- ➔ Business Services -- those businesses that support firms located at the airport with supplies and materials.

Exhibit 23
TOTAL STATEWIDE AIRPORT IMPACTS by IMPACTED INDUSTRY TYPE
Maryland Airports Economic Impact Study

<u>IMPACTED INDUSTRY TYPE</u>	<u>ECONOMIC ACTIVITY</u>	<u>EARNINGS</u>	<u>JOBS</u>
Agriculture	\$24,502,000	\$9,733,900	610
New Construction, Maint. and Repair	148,290,500	45,706,700	1,587
Food	98,690,500	13,109,300	474
Textiles	664,300	72,000	7
Apparel	8,897,100	2,033,800	97
Paper Products	19,078,000	3,622,800	109
Printing, Publishing	67,245,100	18,673,700	574
Chemicals, Petroleum	115,540,600	9,078,200	225
Rubber, Leather	19,910,600	4,358,400	138
Lumber, Furniture	5,290,200	1,225,800	51
Stone, Clay, Glass	8,264,100	1,820,000	61
Primary Metals	6,698,300	1,187,500	26
Fabricated Metals	12,045,500	2,750,400	78
Non-electrical Machinery	9,922,000	3,004,500	83
Electrical Machinery	7,237,300	1,879,800	35
Motor Vehicles,	54,898,700	11,227,400	358
Transportation Equip.	29,118,900	8,313,400	179
Instruments	2,285,400	663,000	19
Miscellaneous Mfg.	3,173,500	878,900	39
Transportation	765,200,500	255,604,500	8,176
Communications	96,392,500	21,061,400	448
Utilities	81,252,400	12,282,500	217
Wholesale Trade	133,287,800	47,353,300	1,309
Retail Trade	359,002,900	160,309,900	8,924
Finance	155,110,200	51,842,100	1,762
Insurance	82,763,000	28,662,400	755
Real Estate	315,027,400	7,659,800	628
Lodging, Amusements	605,426,500	233,662,800	9,924
Personal Services	39,177,100	16,652,500	1,072
Business Services	290,419,100	140,168,800	5,429
Eating, Drinking Estab.	426,289,200	141,938,200	11,114
Health Services	135,845,600	72,893,500	2,147
Other Services	342,901,400	76,419,700	3,437
TOTALS	\$4,469,848,200	\$1,405,850,900	60,092

SOURCE: Wilbur Smith Associates and the Bureau of Economic Analysis

In addition to these obvious beneficiaries, the study suggests that many other not so obvious industries also benefit from Maryland's airports i.e., agriculture which feeds the workers and the visitors, the textile industry which clothes them and uses the airports, the petroleum firms, the utilities which provide power, and even the real estate firms. Overall, the study suggests that everyone in the State benefits from aviation and from the airports, regardless of whether or not they use the airports. Furthermore, the airports provide a vital transportation link to the nation and to the world which attracts businesses to the area and helps enable local firms to expand and grow.

3.9 Tax Impacts

The airports analyzed in this Study rarely receive funds that are generated through local taxes imposed on the general public. In fact, over half of Maryland's public-use airports are privately owned and therefore, cannot generate funding through local taxes. Rather, Maryland's airports generate funds through a number of different sources which include airport operations such as aircraft landing fees, aircraft hanger rentals, tie-down fees, etc. The airports also receive federal funding in the form of FAA grants for airport infrastructure improvements. These federal funds are typically matched by state, local or airport generated funds.

BWI Airport, for example, is owned and operated by the Maryland Aviation Administration, which is a division of the Maryland Department of Transportation. Contrary to many departments of state government, however, the BWI Airport does not rely upon tax dollars for its operation. Instead, BWI is financially self-sustaining. The \$70.0 million in revenues collected in FY 1995 cover the airport's operating expenses and contribute to the construction of the new terminal and other capital projects. So, instead of drawing monies from taxes, BWI funds its own operation.

The operation of Maryland's public use airports enable private sector aviation activities to operate, which generate state and local taxes. These firms pay their employees, which leads to other state income taxes, sales taxes, property taxes, etc.

The state and local taxes are a component of the annual economic activity impacts; they are not additional impacts. This study extracted the state and local tax component of the annual economic impacts based upon prevailing tax rates and average tax rates per earnings. The state taxes are included as impacts under the premise that the state taxes paid by the region are returned to the region.

Statewide the local and state governments collect an annual total of \$13.1 billion through all the various forms of local taxes, according to the State of Maryland, Bureau of Revenue Estimates and the Department of Fiscal Services. Of that, this study estimates that the tax component of the Maryland airport economic impact is approximately \$134.5 million, or about 1.0 percent of the total state and local tax receipts. Exhibit 24 summarizes the estimated State and local taxes resulting from airport operations.

Exhibit 24 TAX RECEIPTS ATTRIBUTABLE TO AIRPORT OPERATIONS Maryland's Public Use Airports, 1995			
Tax Type	STATE AND LOCAL TAXES (\$000's)		
	State	Local	Total
General Sales Tax	\$20,092	\$na	\$20,092
Personal Income Tax	35,007	18,613	53,620
Corporate Income Tax	3,176	na	3,176
Motor Fuel Tax	6,240	na	6,240
Motor Vehicle Fees	4,516	na	4,516
Local Property Tax	2,312	35,983	38,295
Other	<u>2,338</u>	<u>6,255</u>	<u>8,593</u>
TOTAL TAXES	\$73,681	60,851	134,532
Source: WSA and State of Maryland, Bureau of Revenue Est. and the Dept. of Fiscal Services. a/ Other state taxes include alcohol and tobacco, and property transfer taxes. Other local taxes include sales & service, admissions and amusements, recordation, property transfer, front foot assessments and other miscellaneous taxes.			

3.10 Impact Comparison

Comparison between this study of 1995 Statewide economic impacts and the earlier 1989 study indicates an overall increase in economic activity, earnings and jobs. Specifically:

- ➔ Total economic activity increase 55.2 percent from \$2,880 million in 1989 to \$4,470 million in 1995.
- ➔ Total earnings increased 45.5 percent from \$967 million in 1989 to \$1,406 million in 1995.
- ➔ Total full-time equivalent jobs increased 10.8 percent from 54,240 in 1989 to 60,092 in 1995.

The increase in economic impacts is a result of numerous factors including aviation activity, structure of the aviation industry and Maryland's economy. Specific Statewide aviation activity changes in Maryland between 1989 to 1995 are summarized below, and are detailed by airport in the appendix (Exhibit A-5):

- ➔ Based aircraft declined by 5 percent;
- ➔ Commercial and air taxi aircraft operations remained about the same;
- ➔ General aviation itinerant aircraft operations declined 18 percent;
- ➔ General aviation local aircraft operations increased 16 percent; and
- ➔ Enplaned commercial air passenger increased 31 percent.

Exhibit 25 presents the change in total statewide economic activity impact expenditures by airport between 1989 and 1995. It should be noted that the general cost of living, as measured by the Consumer Price Index (CPI)⁸, rose 22.9 percent between 1989 and 1995. This change in overall price levels is a component of the economic activity changes. A brief discussion follows of influential developments at those airports with the most notable changes:

- Baltimore/Washington International: Annual commercial enplaned passengers rose 28.7 percent from 5.1 million in 1989 to 6.6 million in 1995.
- Greater Cumberland Regional: Annual commercial enplaned passengers rose 186.0 percent from 3,392 to 9,700.
- Salisbury-Wicomico County: Although annual commercial enplaned passengers fell by over 6,000 (9%), Federal Express increased its presence significantly.
- Washington County Regional: The impacts associated with the increase in aviation services and a new passenger terminal were offset by the large reduction in employees at a major aircraft parts manufacturer located at the airport.
- Bay Bridge: Based aircraft and total aircraft operations rose slightly. At airport jobs rose from 7 to 12 and several capital improvements were conducted (i.e. taxiway extension, parking apron overlay, new fuel tank, etc.)
- Carroll County: The impacts associated with the automobile part manufacturer (located adjacent to the airport with runway access) are included. Also, 25 additional aircraft are based at the airport, and the runway was extended to 5,100'.
- Easton Municipal: Itinerant aircraft operations rose ten-fold from 5,400 in 1989 to 60,000 in 1995. Air Taxi operations also rose from 2,000 to 10,000 during the same period.
- Frederick Municipal: Based aircraft and aircraft operations rose, which reflect the continued growth in FBO and related aviation business at the airport.
- Garrett County: Impacts associated with a small decline in based aircraft and aircraft operations were offset by capital improvements (runway extension) and greater visitor expenditures.
- Martin State: Numerous developments at the airport include: 30 new T-hangars as well as other private hangars; a self fueling station; several new corporate tenants; and a large increase in corporate aviation activity.
- Montgomery County: Based aircraft and aircraft operations have fluctuated since 1989. Although current levels are below that of 1989, aviation-related employment and expenditure levels at the airport are on the rebound.

⁸Bureau of the Labor Statistics

Exhibit 25
STATEWIDE ECONOMIC IMPACT CHANGES - 1989 to 1995
Maryland Airports Economic Impact Study

AIRPORT	ECONOMIC ACTIVITY IMPACTS		CHANGE	
	1989	1995	Number	Percent
Commercial				
Baltimore/Washington Int'l	\$2,575,974	\$3,954,827	1,378,853	53.5%
Grtr. Cumberland Reg. Arpt	5,541	9,488	3,947	71.2%
Salisbury-Wicomico Co. Reg.	46,180	84,717	38,537	83.5%
Washington Co. Reg. Arpt	66,054	62,022	(4,033)	-6.1%
Total Commercial	\$2,693,749	\$4,111,054	1,417,305	52.6%
General Aviation				
Baltimore Airpark	\$423	\$562	139	32.9%
Bay Bridge Airport	727	2,249	1,522	209.4%
Bennett Airport	293	97	(197)	-67.1%
Cambridge-Dorchester Co.	1,144	1,764	620	54.2%
Carroll County Reg.	2,812	79,448	76,636	2725.3%
Cecil County Airpark	189	138	(52)	-27.2%
Clearview Airpark	305	329	24	7.8%
College Park Airport	1,598	1,983	385	24.1%
Crisfield-Somerset Airport	62	82	20	31.9%
Davis Airport	190	329	139	73.4%
Easton Muni. Airport	5,094	15,833	10,739	210.8%
Essex Skypark	309	433	124	40.1%
Fallston Airport	43	77	34	78.1%
Frederick Muni. Airport	44,353	61,346	16,993	38.3%
Freeway Airport	1,857	2,529	672	36.2%
Garrett County Airport	513	1,278	765	149.1%
Harford County Airport	1,195	1,131	(65)	-5.4%
Haysfield	196	48	(148)	-75.4%
Kentmorr Airpark	95	185	90	94.2%
Lee Airport	1,062	1,574	512	48.2%
Martin State Airport	96,696	155,972	59,276	61.3%
Maryland Airport	957	1,282	325	33.9%
Mexico Farms Airport	70	61	(9)	-12.6%
Montgomery County Airpark	10,879	15,040	4,161	38.2%
Ocean City Muni. Airport	8,751	2,413	(6,338)	-72.4%
Potomac Airpark	1,040	1,657	617	59.3%
Raintree Airpark	41	292	251	611.2%
Ridgely Airpark	57	622	565	990.7%
Saint Mary's County Airport	2,233	6,360	4,127	184.8%
Suburban Airport	546	593	47	8.5%
Washington Ex./ Hyde Field	2,444	3,091	647	26.5%
Total Gen. Aviation	\$186,174	\$358,794	\$172,620	92.7%
Total Commercial & GA	\$2,879,923	\$4,469,848	\$1,589,925	55.2%

SOURCE: Wilbur Smith Associates and the Bureau of Economic Analysis

- Ocean City Municipal: Discontinuation of commercial air passenger service has resulted in a transfer of related impacts to Salisbury-Wicomico. General aviation itinerant operations also have apparently decreased significantly since 1989. Nonetheless, the airport continues to accommodate many visiting aircraft during the summer season.
- Ridgely: New runway construction, and significant increases in aircraft operations led to the notable increase in total impacts
- Saint Mary's: Rapid growth of the nearby Putuxent Naval Air Station has resulted in a six-fold increase in itinerant aircraft operations. These itinerant aircraft operations bring government officials and businessmen to the Air Base.

3.11 Specialized and Community Services - The preceding discussion pertained to the aviation related industry benefits. However, other benefits are derived from specialized and emergency services offered to communities by various airports. Although non-quantifiable, the specialized and community service impacts are vital to the state's residents. Examples found during the impact study include the following:

- Search and Rescue: Law enforcement periodically conducts searches and/or surveillances from the aircraft. Local airports enable access for such rescues and law enforcement services.
- Career Path: In recent years, general aviation has evolved into a major training ground for aviation services careers. Local airports sometimes support or supplement local high school or college programs to train students for aviation careers.
- Medical Evacuation: Some of Maryland's airports are used regularly by fixed-wing and/or helicopter air ambulance services to move patients on a routine basis. In addition, many more indicate that they sometimes are used on an emergency basis for such services. A life saved due to use of a Maryland airport has a definite community value which cannot be quantified.
- Medical Shipments: A number of Maryland airports are used to receive air shipments of medical supplies not available locally (serums, antitoxins, isotopes, transplant organs, etc.), and to ship items for diagnosis (blood and tissue samples etc.).
- Environmental/Natural Resource Management: The State of Maryland uses general aviation aircraft at a number of small and mid-sized airports throughout the State to aid in managing environmental and wildlife matters.

- **Corporate Operations:** Firms with operations or clients throughout the east coast and/or the country often necessitate last minute transport of key personnel. Such transport often cannot be supplied satisfactorily by commercial air service, due to scheduling or cost constraints. However, corporate aviation operations enable local companies to access their other locations and clients where ever, and whenever, the need arises. Likewise, Maryland's airports enable non-local businesses to visit the region which helps to stimulate local business.

- **Express Cargo:** Just-in-time cargo delivery services are conducted by both the integrated carriers (FedEx, UPS, etc.) at commercial airports and by private aircraft at general aviation airports. Just-in-time cargo shipments by privately owned aircraft enable manufacturers more flexibility in plant site selection, which sometimes leads to site locations adjacent to an airport. Such flexibility has brought new employment opportunities to rural Maryland that otherwise would have located elsewhere.

- **Traffic/News:** Local television and news stations regularly conduct helicopter operations to monitor and relay traffic conditions to the general public. In doing so, the instant traffic information enables commuters to avoid areas of traffic congestion and reach their destination more expediently and safely.

- **Other Services:** The airports also improve business productivity in numerous other ways, which include:
 - ▶ Aerial inspections of utilities (pipelines, electricity lines, etc.) enable businesses to monitor their infrastructure and quickly locate problem areas.
 - ▶ Aerial agricultural seeding and insect spraying enhance agricultural yields and improve quality.
 - ▶ Aerial photography has become an indispensable tool for local developers, planners, etc. who depend on the aerial surveys for their business operations.

In summary, the qualitative benefits associated with Maryland's airports cannot be quantitatively assessed as those direct, indirect and multiplier impacts previously documented throughout this study. Nonetheless, the qualitative benefits do exist and are as important, if not more so, than the thousands of jobs and billions of dollars of expenditures associated with the aviation transport industry. The relative importance of the qualitative benefits becomes clear when one considers the fact that the purpose of aviation transport is to serve personal and business needs. These needs, be it cargo transport or emergency evacuation or vacation travel, cannot quantitatively be assessed. However, these needs are real and drive the aviation transport industry impacts detailed in this study.

Chapter 4

ECONOMIC IMPACTS BY AIRPORT

This chapter presents the impact summaries by individual airport. These summaries describe the roles played, the services offered, and the economic impacts created at each airport. In addition, the summaries provide contact information for each airport.

The first page presents an overview of the airports' role within the community, lists the aviation services available, and provides statistics on the number of based aircraft by type, aircraft operations by type and enplaned commercial passengers. The second page provides a brief explanation of how these services translate into economic impacts, and explains the different economic impact types and measures.

The economic impact summary presents the expenditure and job impacts that arise locally because of each airport. The expenditure impacts are broken down by the final demand direct and indirect expenditures that occur due to the provision of aviation services at the airport, or due to the use of aviation services by the people and businesses that depend on the airport. The resulting multiplier expenditure impacts reflect the dollar expenditures associated with the respending of direct and indirect expenditures. The total impacts represent the total economic activity, jobs and the associated earnings for each airport.

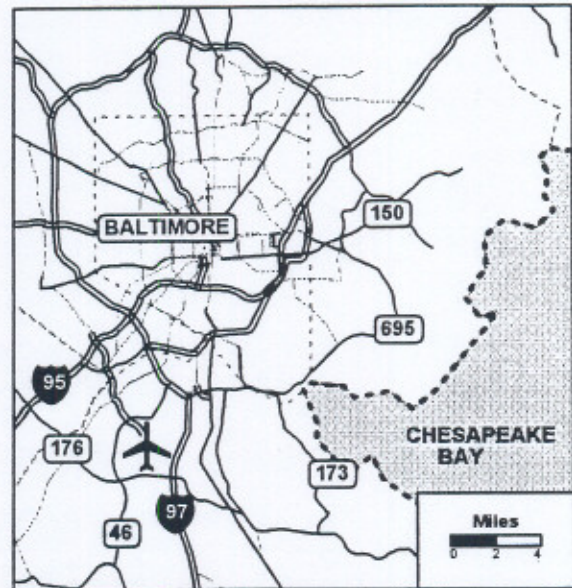
The four commercial passenger service airports are presented first, followed by the other 31 general aviation service airports.

ECONOMIC IMPACT OF BALTIMORE/WASHINGTON INT'L (BWI)

Baltimore/Washington International Airport enplaned over 6.5 million passengers and 163,000 tons of air cargo in 1995. In doing so, the Airport generated record operating revenues of over \$73 million. Construction is nearly complete on a new six gate international passenger terminal and a 3,000 space expansion to the parking garage. By meeting the increasing needs of the traveling and shipping public, BWI provides an efficient, user-friendly facility to area residents, while attracting visitors from around the world.

A new BWI Observation Gallery at the airport includes views, exhibits and children's features describing the airport and the services which it provides. Such services include:

- Numerous commercial passenger and cargo airlines;
- Fuel sales (100LL and Jet A);
- Major powerplant & airframe repair;
- Aircraft charter & rental;
- Aircraft sales;
- Flight instruction;
- General aviation aircraft hangars and paved tiedown facilities;
- An array of eating establishments;
- Car rental agencies;
- Extensive parking facilities with shuttle transportation; and
- MARC and Amtrak access.



This aviation and business activity generates considerable economic impacts on the local community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at BALTIMORE/WASHINGTON INT'L (BWI)

Commercial Passenger Enplanements		6,582,000	
<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	61	Local Operations	17,634
Multi-Engine	23	Itinerant Operations	31,727
Jet	7	Air Carrier	154,212
Helicopter	5	Commuter	71,800
		Air Taxi	3,496
		Military	2,834
Total Aircraft	96	Total Operations	281,703

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Baltimore/Washington Int'l Airport. These include at-airport expenditures on commercial passenger services, fuel sales, aircraft and avionics repair, aircraft charter and rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors, residents and local travel agents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

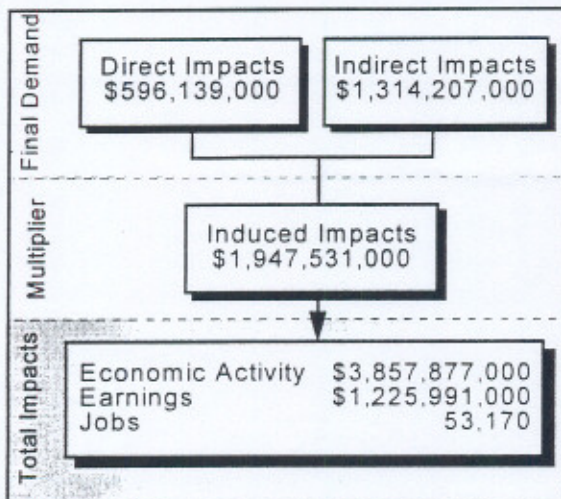
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Baltimore/Washington Int'l Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$120.6 million.

For further information regarding Baltimore/Washington Int'l Airport please contact:

Lynn S. Bezilla, Director
Division of Planning
PO Box 8766
BWI Airport MD 21240-0766
Phone: (410) 859-7074
Fax: (410) 859-5440

For further information regarding this study please contact:

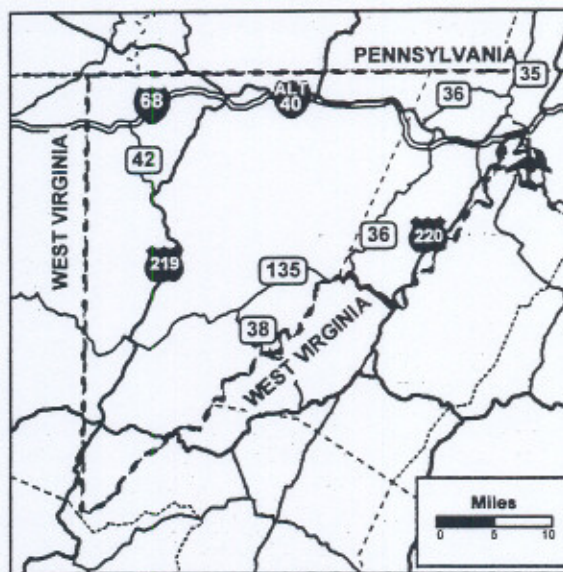
Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757

ECONOMIC IMPACT OF GREATER CUMBERLAND REGIONAL AIRPORT (CBE)

Greater Cumberland Airport lies three miles south of Cumberland on a hill across the Potomac River in West Virginia. Nonetheless, the airport is part of Maryland's aviation system and provides essential commuter service for the residents of western Maryland and the rugged outlying areas. In addition, the airport provides a base for the Maryland State medical evacuation unit. Major services available Include:

- Commuter passenger service
- Aircraft charter & rental
- Fuel sales (100LL and Jet A)
- Major & minor powerplant repair
- Major & minor airframe repair
- Flight instruction
- Automobile rental
- MD State Police MEDEVAC

The current commuter service flies through Pittsburgh, however additional service is anticipated through Baltimore in the near future. In fact, enplaning passengers nearly tripled from 3,400 to 9,700 between 1989 and 1995. Visitors to the area's mountains and water attractions arrive in the summer to golf, boat and swim and in the winter to ski. All of which benefit the local economy. To accommodate future passenger traffic, the airport currently is constructing a new passenger terminal.



The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at GREATER CUMBERLAND REGIONAL AIRPORT (CBE)

Commercial Passenger Enplanements		9,700	
<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	36	Commuter	9,702
Multi-Engine	6	Local	10,500
Jet	1	Itinerant	1,980
Helicopter	1	Air Taxi	200
Gliders	9	Military	200
Total Aircraft	53	Total Operations	22,582

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Greater Cumberland Regional Airport. These include at-airport expenditures on commercial passenger services, fuel sales, aircraft and avionics repair, aircraft charter and rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors, residents and local travel agents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

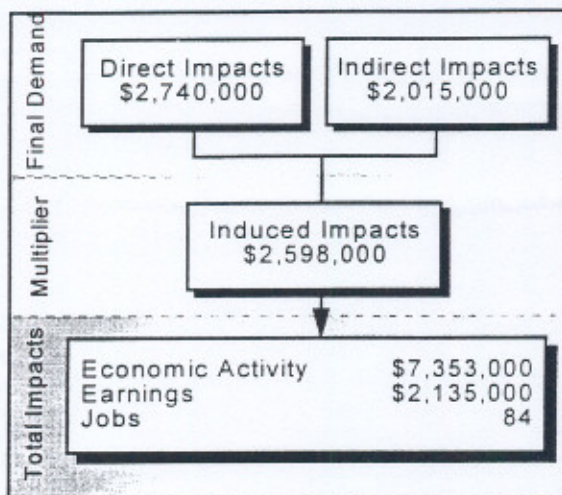
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Greater Cumberland Regional Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$210,000.

For further information regarding Greater Cumberland Regional Airport please contact:

John Jennings
Cumberland Regional Airport
Route 1, Box 99
Wiley Ford, WV 26767
Phone: (304) 738-0002
Fax: (304) 738-0032

For further information regarding this study please contact:

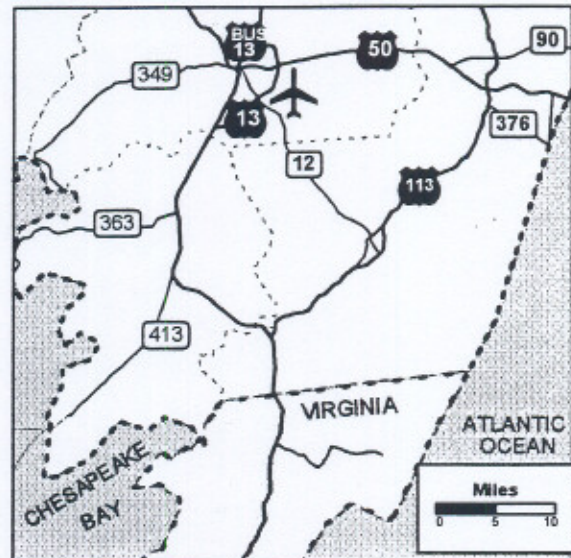
Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757

ECONOMIC IMPACT OF SALISBURY-WICOMICO CO. REG. (SBY)

Located on the Delmarva peninsula 30 miles west of Ocean City and 115 miles south-east of Baltimore, the Salisbury-Wicomico Airport provides indispensable commuter air passenger service. Current commuter service to Washington National, Philadelphia and BWI improves visitor access to Maryland's beaches while providing local residents with a wide selection of connection possibilities. Furthermore, Piedmont Airlines has a major aircraft maintenance and service facility located at the airport. The airport also provides a regional base for a state medical evacuation unit. In summary, the major services offered include:

- Commuter passenger service
- Aircraft charter & rental
- Fuel sales (100LL and Jet A)
- Major & minor powerplant repair
- Major & minor airframe repair
- MD State Police MEDEVAC
- Flight instruction
- Crop dusting...
- T-hangars & paved tiedown
- Airport restaurant
- Automobile rental

To better accommodate future commercial traffic, the airport recently built a new passenger terminal.



The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at SALISBURY-WICOMICO CO. REG. (SBY)

Commercial Passenger Enplanements 63,748

Based Aircraft

Single Engine	73
Multi-Engine	64
Jet	1
Helicopter	1
Total Aircraft	139

Annual Aircraft Operations

Local Operations	24,000
Itinerant Operations	47,500
Commuter	10,220
Military	18,000
Total Operations	99,720

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Salisbury-Wicomico County Regional Airport. These include at-airport expenditures on commercial passenger services, fuel sales, aircraft and avionic repair, aircraft charter and rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors, residents and local travel agents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

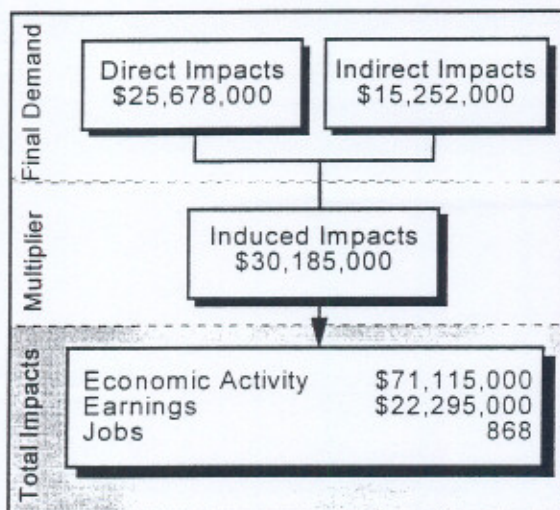
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Salisbury-Wicomico County Regional



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$2.2 million.

For further information regarding Salisbury-Wicomico County Regional Airport please contact:

Robert L. Bryant
5485 Airport Terminal Road, Unit A
Salisbury, MD 21801
Phone: (410) 548-4827
Fax: (410) 548-4945

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757

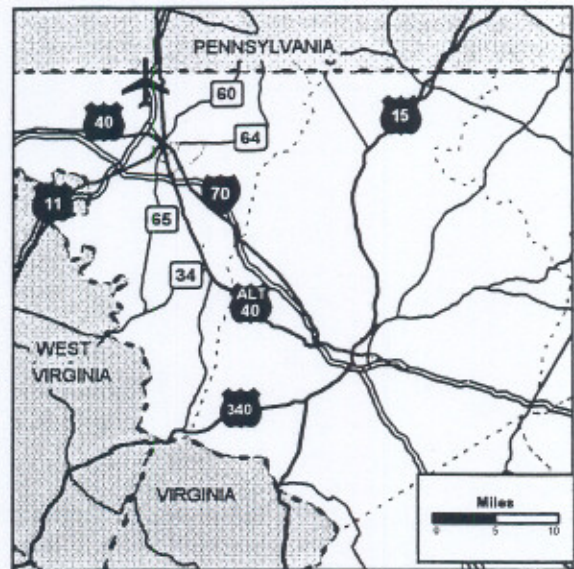
ECONOMIC IMPACT OF WASHINGTON COUNTY, MD REGIONAL AIRPORT(HGR)

The Washington County Airport in Hagerstown could be considered a one-stop shopping facility for the aviation community. From air passenger service to flight simulator training to engine housing manufacturing, the airport offers a wide range of aviation services, which include:

- Commuter air passenger service
- Aircraft charter & rental
- Fuel sales (100LL and Jet A)
- Civilian to military aircraft conversion
- Aircraft engine housing manufacturing
- Aircraft paint shop
- Avionics repair
- Aircraft interior refurbishing shop
- Non-destructive testing facility,
- Computerized testing facility
- Several maintenance facilities
- Flight school
- Flight testing examiner
- T-hangars, community hangars and paved & turf tiedown
- Automobile rental

Coupled with the scheduled USAir Express commuter service, a sophisticated instrument landing system (CAT 1), and a control tower, HGR is a regional airport with big city amenities.

The aviation and business activity at the airport helps to generate economic impacts on the local



community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at WASHINGTON CO., MD REG. AIRPORT (HGR)

Commercial Passenger Enplanements 33,344

Based Aircraft

Single Engine	142
Multi-Engine	35
Jet	13
Helicopter	1
Ultra-Lights	2
Total Aircraft	193

Annual Aircraft Operations

Air Carrier	1,428
Commuter	4,462
Local	19,995
Itinerant	33,974
Air Taxi	496
Military	<u>1,284</u>
Total Operations	61,639

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Washington County Regional Airport. These include at-airport expenditures on commercial passenger services, aircraft engine manufacturing, fuel sales, aircraft and avionic repair, aircraft charter and rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors, residents and local travel agents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

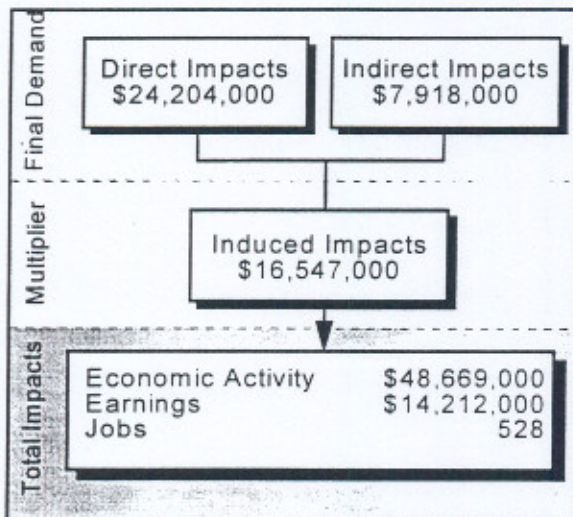
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Washington County Regional Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$1.4 million.

For further information regarding Washington County Regional Airport please contact:

Carolyn Motz
18434 Showalter Road
Hagerstown, MD 21742
Phone: (301) 791-3333
Fax: (301) 791-2590

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757

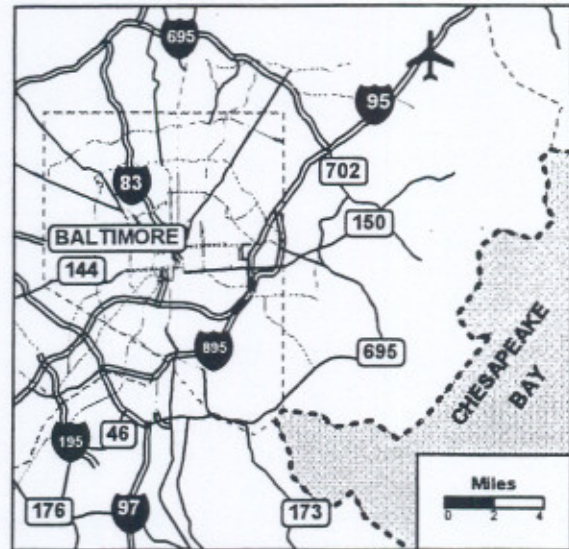


ECONOMIC IMPACT OF BALTIMORE AIRPARK (1W2)

The Baltimore Airpark is a small privately owned general aviation airport open for public use. Located close to I-95 and I-685, the airpark lies 13 miles northeast of Baltimore. The airport's 2,200' runway primarily caters to local recreational flyers, however nearby restaurants and hotels are available to the occasional visitors who arrive via the airport. The airport provides the following services:

- ✈ Fuel sales (100LL)
- ✈ Minor powerplant repair
- ✈ Minor airframe repair
- ✈ T-hangars and paved tiedowns
- ✈ Flight training
- ✈ Aerial photography
- ✈ Banner towing

The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.



To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at BALTIMORE AIRPARK (1W2)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	20	Local	2,000
Multi-Engine	1	Itinerant	1,000
		Military	20
Total Aircraft	21	Total Operations	3,020

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Baltimore Airpark. These include at-airport expenditures on fuel sales and aircraft repair, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

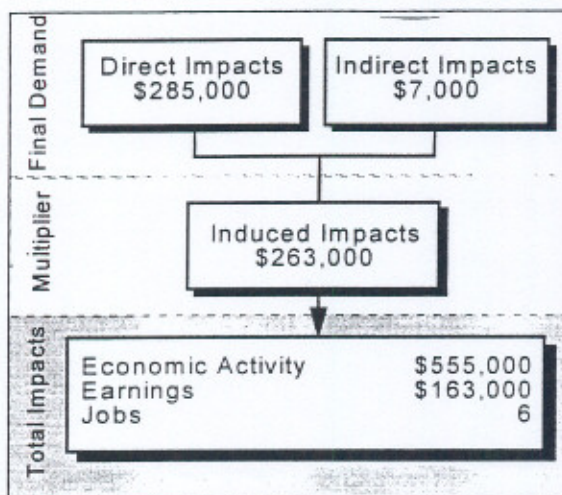
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Baltimore Airpark Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$16,000.

For further information regarding Baltimore Airpark please contact:

C. Earle Mace
513 E. Joppa Road
Perry Hall, MD 21128
Phone: (410) 256-4238

For further information regarding this study please contact:

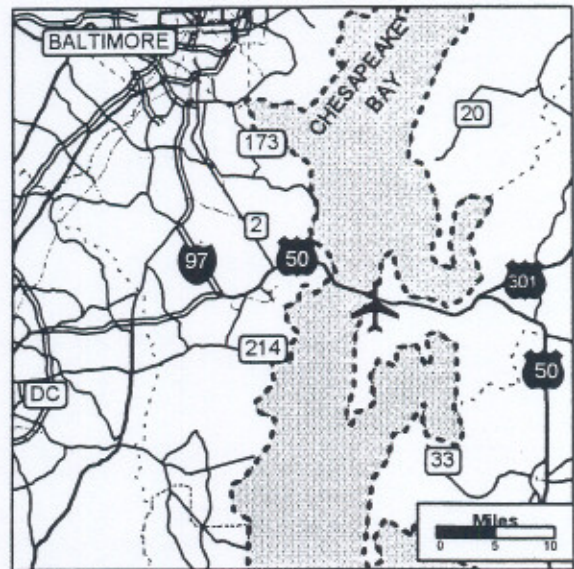
Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757

ECONOMIC IMPACT OF BAY BRIDGE AIRPORT (W29)

The Bay Bridge Airport is conveniently located on the eastern shore of the Chesapeake Bay near the Kent Island entrance to the Preston Lane Memorial Bridge. The close proximity to Annapolis and the Washington DC-Baltimore metropolitan area helps alleviate general aviation aircraft activity in the metro area. In doing so the airport provides the following services:

- Fuel sales (80oct & 100LL)
- Aircraft charter & rental
- Flight instruction
- Major powerplant repair
- Major airframe repair
- T-hangars and paved & turf tiedowns
- Automobile rental and/or courtesy car

Acquired by Queen Anne's County in 1988, the airport's well maintained 2,910' runway has become a destination for week-end flyers from the northeast. Attracted to the Chesapeake Bay region by the several marinas, restaurants, golf courses and recreational facilities in the area, visitors to the area will stay anywhere for a few hours to several days. In fact, day visitors can walk from the airport to a nearby marina and restaurant.



The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at BAY BRIDGE AIRPORT (W29)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	50	Local	5,500
Multi-Engine	8	Itinerant	9,400
		Air Taxi	100
Total Aircraft	58	Total Operations	15,000

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Bay Bridge Airport. These include at-airport expenditures on fuel sales, aircraft and avionics repair, aircraft charter and rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

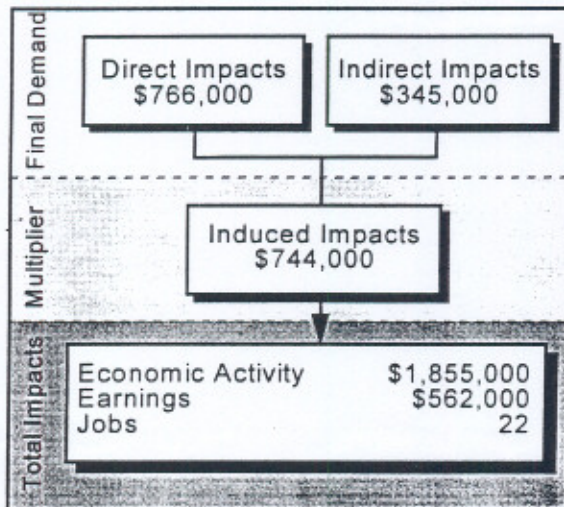
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Bay Bridge Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$55,000.

For further information regarding Bay Bridge Airport please contact:

John Kirby
202 Airport Road
Stevensville, MD 21666
Phone: (410) 643-4364
Fax: (410) 643-4273

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757



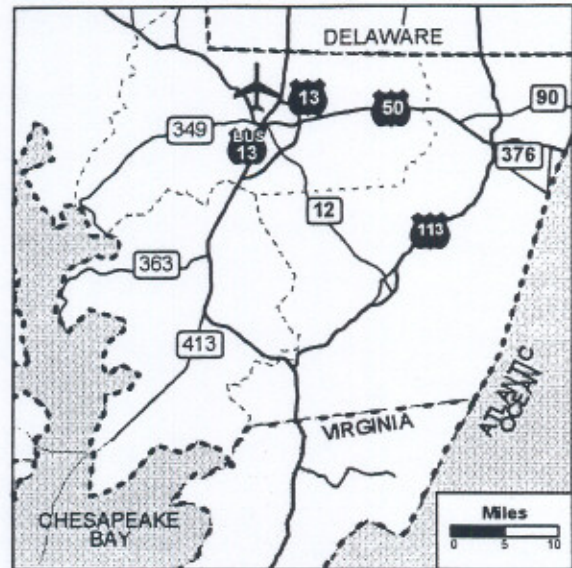
ECONOMIC IMPACT OF BENNETT AIRPORT (1N5)

Bennett Airport is a small privately owned, public use airport located on the Delmarva Peninsula about four miles from Salisbury. The two turf runways (3,150' and 1,950') accommodate local recreational pilots, and some crop dusting operation. Current services offered at the airport include:

- ✈ Minor powerplant repair
- ✈ T-hangars & turf tiedowns
- ✈ Crop dusting

The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports.



The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at BENNETT AIRPORT (1N5)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	8	Local	600
Ultra-Lights	2		
Total Aircraft	10	Total Operations	600

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Bennett Airport. These include at-airport expenditures on fuel sales, aircraft repair, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

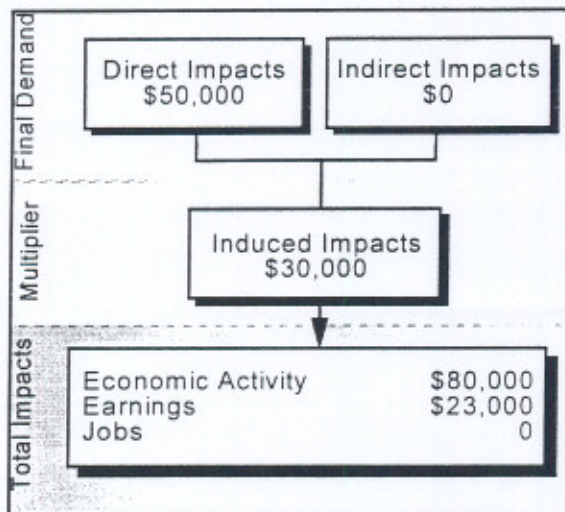
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Bennett Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$2,000.

For further information regarding Bennett Airport please contact:

Howard W. Bennett, Jr.
28890 Naylor Mill Road
Salisbury, MD 21801
Phone: (410) 742-9642

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757

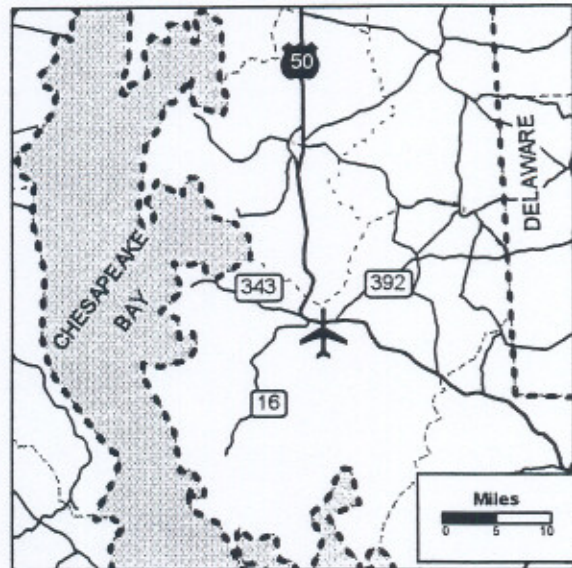
ECONOMIC IMPACT OF CAMBRIDGE DORCHESTER AIRPORT (CGE)

The Cambridge Dorchester Airport emerged 20 years ago from a conversation between the mayor and the owners of a local plant. Today the publicly owned airport offers a 4,004' asphalt runway and provides the following services:

- Fuel sales (100LL and Jet A)
- Major & minor powerplant repair
- Major & minor airframe repair
- Aircraft refinishing
- Aircraft charter
- Flight instruction
- T-hangars & paved tiedown
- Restaurant

Located on the Delmarva Peninsula close to the Chesapeake Bay, the airport accommodates hunters from across the nation, especially during the annual Grand National Hunt, which attracts high profile CEO's, celebrities and state governors.

The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.



To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at CAMBRIDGE DORCHESTER AIRPORT (CGE)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	26	Local	6,327
Multi-Engine	1	Itinerant	2,393
		Military	201
Total Aircraft	27	Total Operations	8,921

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Cambridge-Dorchester County Airport. These include at-airport expenditures on fuel sales, aircraft and avionics repair, aircraft charter and rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

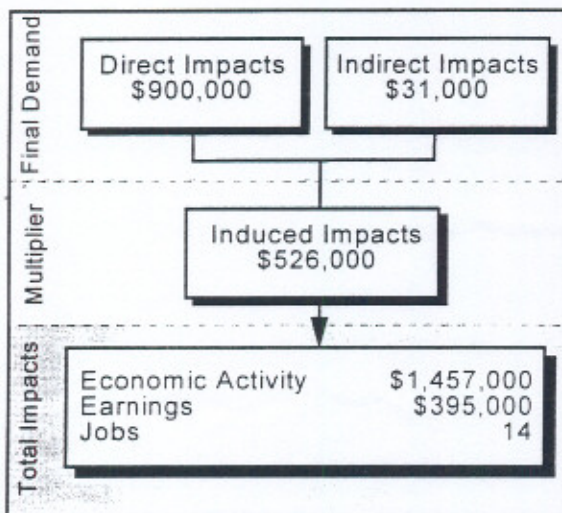
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Cambridge-Dorchester County Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$39,000.

For further information regarding Cambridge-Dorchester County Airport please contact:

Elvin D. Thomas
5435 Handley Road
Cambridge, MD 21613
Phone: (410) 228-4571

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757

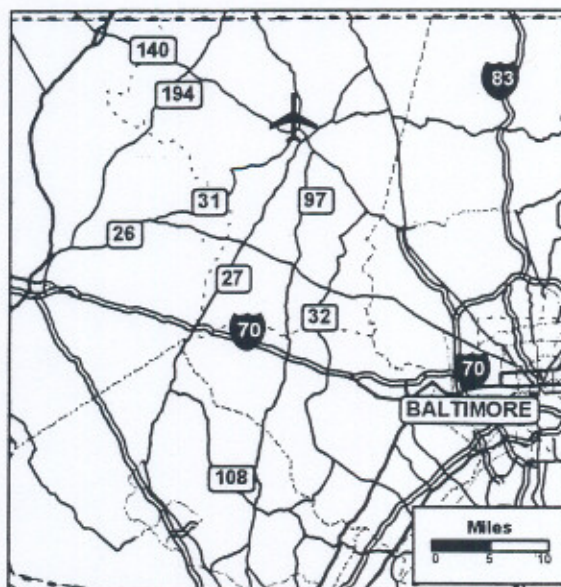
ECONOMIC IMPACT OF CARROLL COUNTY REGIONAL AIRPORT (W54)

Carroll County Regional Airport exemplifies how a small grass airstrip can grow to become a major regional airport. In 1979, a new 3,200 asphalt runway was built alongside the original grass strip. An automobile parts manufacturer located next to the airport and began to regularly ships parts on a just-in-time delivery basis to its customers nationwide.

Since then, the manufacturer has grown, building two plant additions and doubling its work force. To accomodate larger planes, the runway was extended to 5,100', widened to 100' and grooved. This economic development has attracted other businesses to the nearby industrial park.

The Airport is located in rural Maryland about 30 miles northwest of Baltimore and 60 miles north of Washington, D.C. In addition to the automobile parts manufacturer, the airport provides a wide range of aviation services, which includes:

- Fuel sales (100LL, 80oct and Jet A)
- Major & minor airframe repair
- Major & minor powerplant repair
- Avionics repair
- Aircraft charter and rental
- Flight instruction
- Community hangars and tiedowns



The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at CARROLL COUNTY REGIONAL AIRPORT (W54)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	112	Local	105,000
Multi-Engine	6	Itinerant	20,000
Helicopter	1	Air Taxi	200
		Military	150
Total Aircraft	119	Total Operations	125,350

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Carroll County Reg. These include at-airport expenditures on fuel sales, aircraft and avionics repair, aircraft charter and rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents, as well as by a major automobile part manufacturer located adjacent to the airport with runway access.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

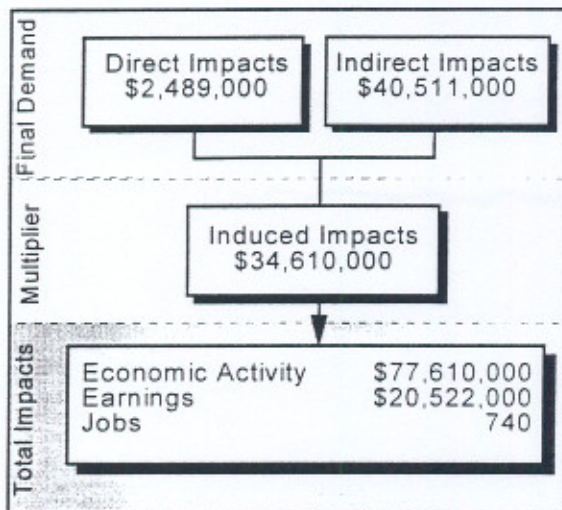
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Carroll County Reg. Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$2.0 million.

For further information regarding Carroll County Reg. please contact:

June Poage
200 Airport Drive
Westminster, MD 21157
Phone: (410) 876-7200
Fax: (410) 876-8324

For further information regarding this study please contact:

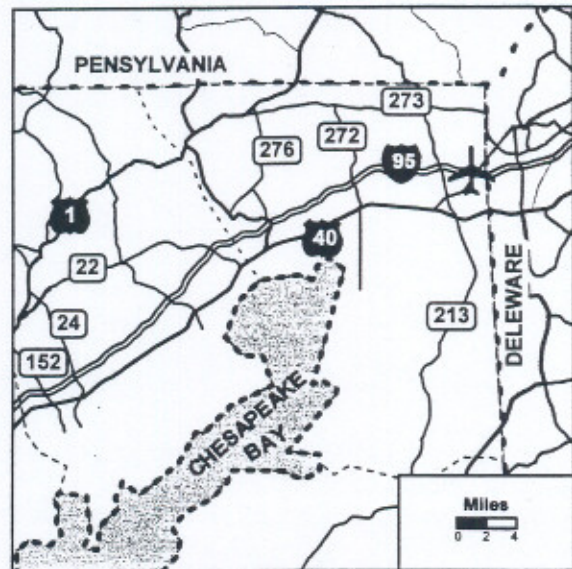
Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757

ECONOMIC IMPACT OF CECIL COUNTY AIRPARK (2N0)

Cecil County Airpark is a small privately owned general aviation airport in the northeastern corner of Maryland. Located in a rural area, the airport's 2,500' asphalt runway primarily serves local recreational flyers.

The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.



1995 AVIATION ACTIVITY at CECIL COUNTY AIRPARK (2N0)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	17	Local	2,750
		Itinerant	1,250
		Military	70
Total Aircraft	17	Total Operations	4,070

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Cecil County Airpark. These include at-airport expenditures on fuel sales, aircraft and avionics repair, aircraft charter and rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

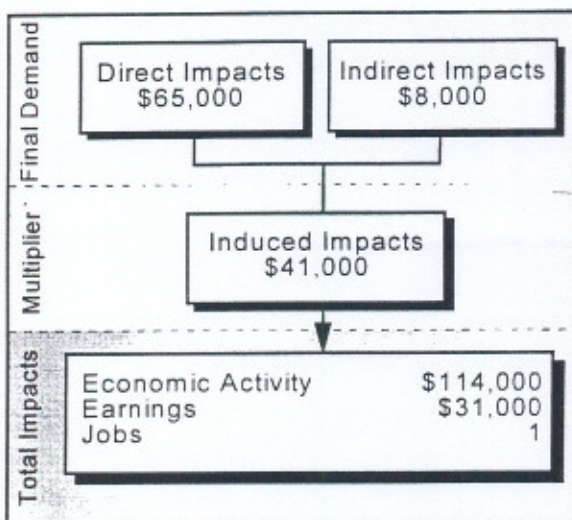
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Cecil County Airpark Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$3,000.

For further information regarding Cecil County Airpark please contact:

Jane Stradley
PO Box 117
Kimbleville, PA 19347
Phone: (410) 651-1336

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757

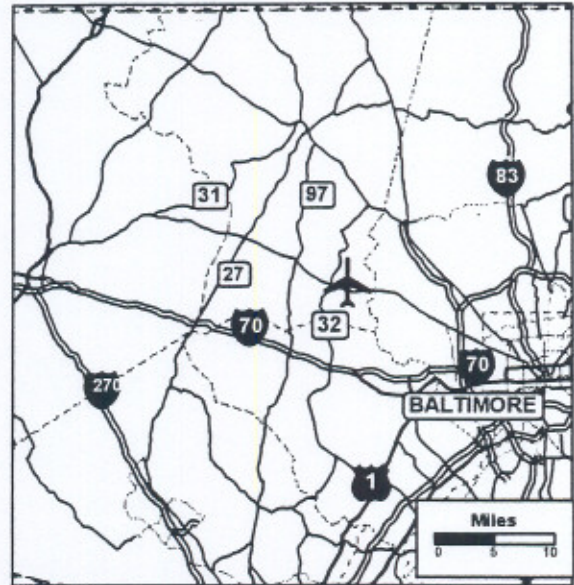
ECONOMIC IMPACT OF CLEARVIEW AIRPARK (2W2)

The small privately owned Clearview Airport is located in Carroll County northwest of Baltimore. The general aviation airport is open to the public and offers an instrument approach to its 1,845' asphalt runway, as well as a well-stocked pilot and parts shop frequented by customers from across the east coast as well as from abroad. Other aviation services offered at Clearview include:

- Fuel sales (80 oct. & 100LL)
- Major & minor powerplant repair
- Major & minor airframe repair
- T-hangars and paved & turf tiedowns

The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports.



The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at CLEARVIEW AIRPARK (2W2)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	29	Local	11,440
Multi-Engine	2	Itinerant	1,495
Total Aircraft	31	Total Operations	12,935

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Clearview Airpark. These include at-airport expenditures on fuel sales, aircraft repair, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

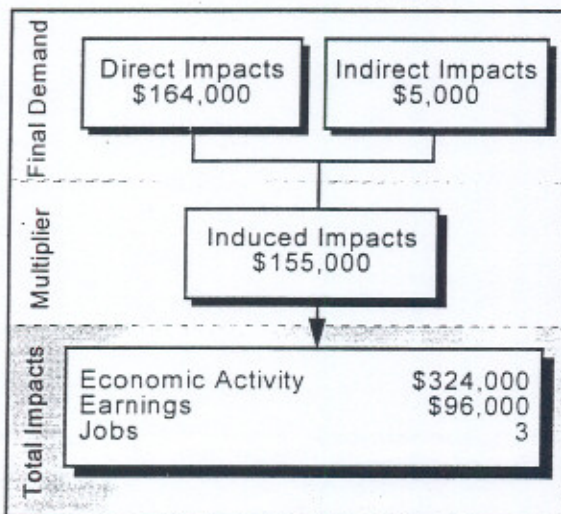
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Clearview Airpark Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$9,000.

For further information regarding Clearview Airpark please contact:

Thomas Chapman
503 Oak Tree Road
Wetminster, MD 21157
Phone: (410) 795-1176

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757

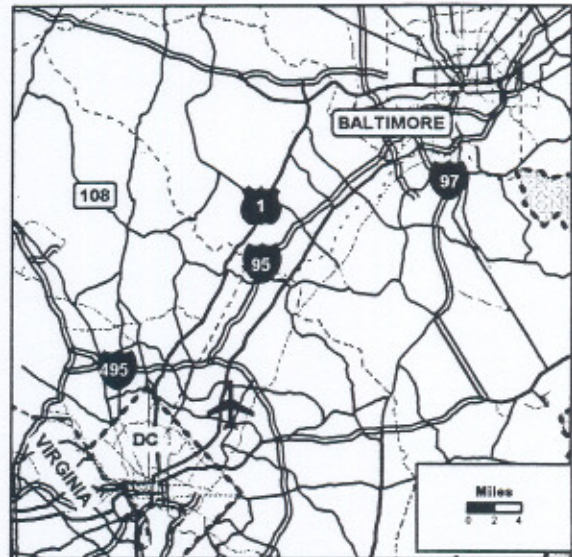
ECONOMIC IMPACT OF COLLEGE PARK AIRPORT (CGS)

As the oldest continually running airport in the U.S., the College Park Airport is a haven for the aviation aficionado. Publicly owned by the Maryland National Capital Park and Planning Commission, the airport features an aviation museum, a historic aircraft restoration facility and a squadron-theme restaurant. The airport's historical significance attracts many vintage aircraft from across the U.S. as well as aviation related functions.

The general aviation airport is located in the NE suburbs of Washington, D.C., near the University of Maryland, and offers a 2,610' asphalt runway. Specific services available at College Park include:

- Fuel sales (80 oct & 100LL)
- Major & minor powerplant repair
- Major & minor airframe repair
- Avionics repair
- Historic aircraft renovation
- Flight instruction
- Paved & turf tiedowns
- Airport restaurant

The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.



To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at COLLEGE PARK AIRPORT (CGS)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	77	Local	9,000
Multi-Engine	2	Itinerant	3,000
		Air Taxi	10
Total Aircraft	79	Total Operations	12,010

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at College Park Airport. These include at-airport expenditures on fuel sales, aircraft and avionics repair, aircraft charter and rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

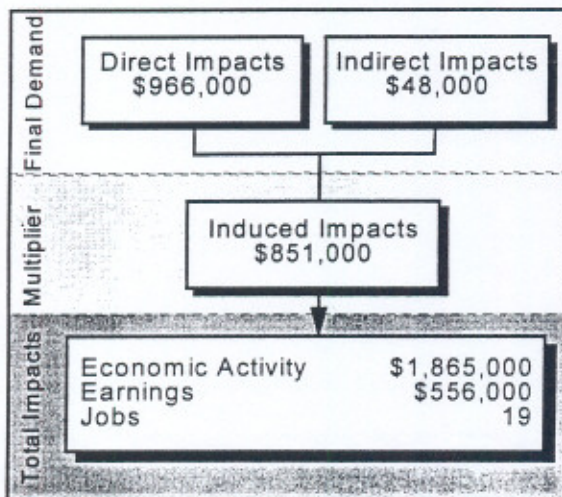
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

College Park Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$55,000.

For further information regarding College Park Airport please contact:

Airport Manager
1909 CPL Frank S. Scott Drive
College Park, MD 20740
Phone: (301) 864-5844
Fax: (301) 277-9269

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757



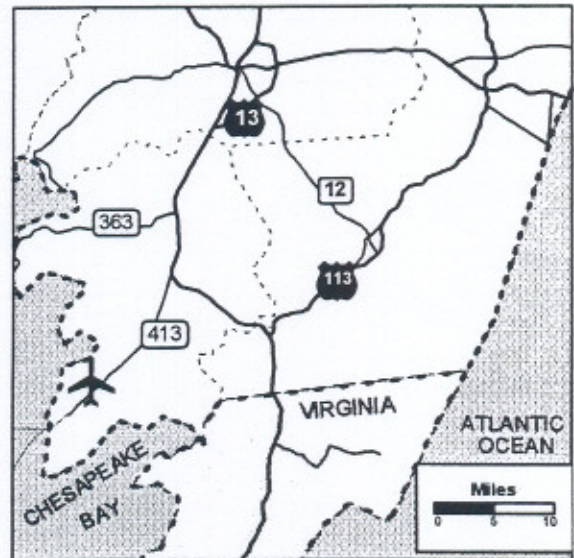
ECONOMIC IMPACT OF CRISFIELD-SOMERSET AIRPORT (W41)

Crisfield-Somerset Airport is a small publicly owned general aviation airport located on the Delmarva Peninsula. Despite the limited services available and low aircraft activity, the airport does have two runways (a 2,490' asphalt/concrete and a 3,440' turf) and numerous lots available for development. Currently, the following services are available at the airport:

- Fuel sales (100LL)
- Major powerplant repair
- Major airframe repair
- Paved & turf tiedowns

The small airport provides round-the-clock fuel service at a competitive price, and often is frequented by transient flyers from the northeast. The airport also arranges the delivery of fresh seafood to the airport for transient visitor pickup.

The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.



To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at CRISFIELD-SOMERSET AIRPORT (W41)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	5	Local	150
		Itinerant	650
		Military	50
Total Aircraft	5	Total Operations	850

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Crisfield-Somerset Airport. These include at-airport expenditures on fuel sales, aircraft repair, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

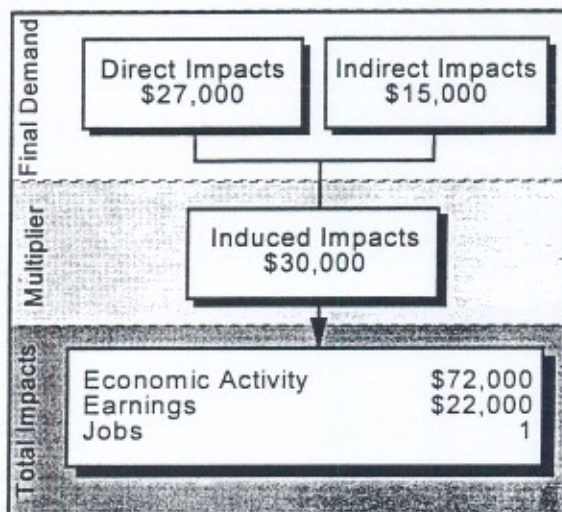
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Crisfield-Somerset Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$2,000.

For further information regarding Crisfield-Somerset Airport please contact:

Sidney J. Dize
4784 Jacksonville Road
Crisfield, MD 21817
Phone: (410) 968-3062

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757



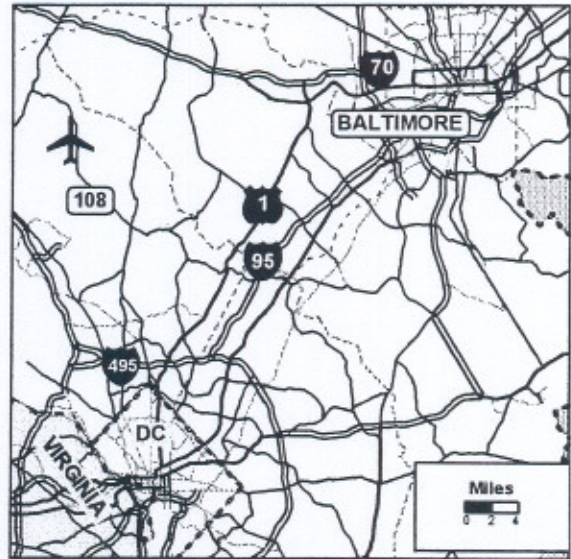
ECONOMIC IMPACT OF DAVIS AIRPORT (W50)

Davis Airport is a small privately owned, public use airport in Central Maryland in close proximity to the Baltimore-Washington, DC area. The single 1,950' runway primarily accommodates local recreational flyers and flight instructors. Current services offered at the airport include:

- ✈ Minor powerplant repair
- ✈ Minor airframe repair
- ✈ Flight instruction
- ✈ Paved & turf tiedowns

The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports.



The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at DAVIS AIRPORT (W50)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	45	Local	15,000
		Itinerant	<u>175</u>
Total Aircraft	45	Total Operations	15,175

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Davis Airport. These include at-airport expenditures on fuel sales, aircraft repair, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

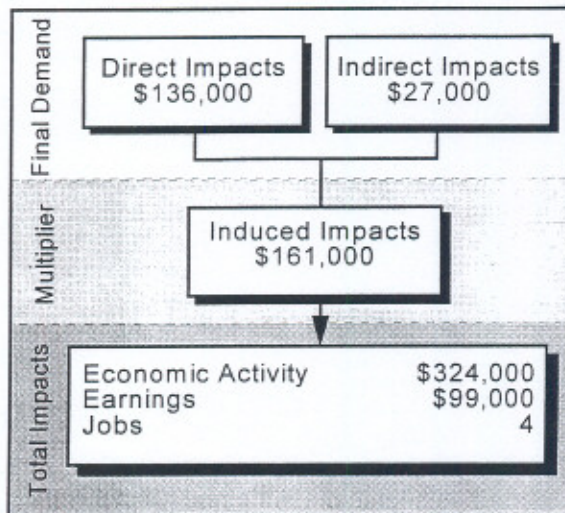
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Davis Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$10,000.

For further information regarding Davis Airport please contact:

Mrs. W. H. Paille
7200 Hawkins Creamery Road
Laytonsville, MD 20882
Phone: (301) 253-2897

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757

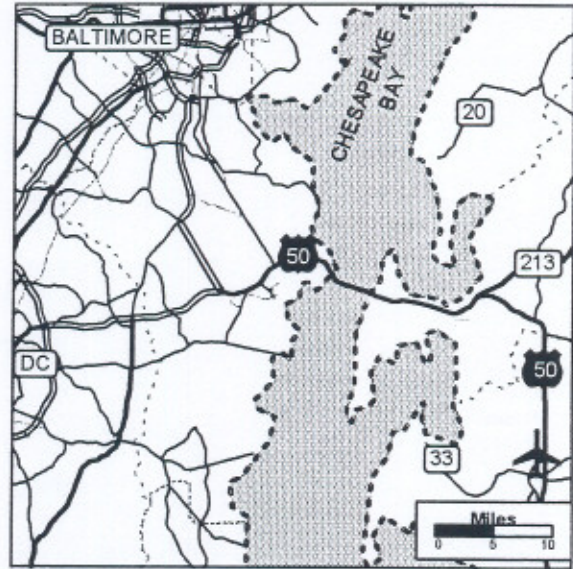


ECONOMIC IMPACT OF EASTON MUNICIPAL AIRPORT (ESN)

Located on the Delmarva peninsula, Easton Airport is ideally situated between Philadelphia, Baltimore, Washington, D.C., and Norfolk to serve north and south bound corporate aircraft operations. The cultivation of the corporate jet market over several years has led to considerable growth in the airport's air taxi operations. Currently, a full range of aviation services offered at the airport has developed to include:

- Aircraft charter & rental
- Fuel sales (100LL and Jet A)
- Major & minor powerplant repair
- Major & minor airframe repair
- Avionics repair
- Flight instruction and examiner
- Air freight
- Corporate flight departments
- Community & T-hangars, and paved tie-downs
- Airport restaurant
- Aerial photography
- Automobile rental

The airport also accommodates visitors from across the nation who are attracted to the region's excellent hunting and boating attractions. Airport arriving visitors typically visit the resort communities of St. Michaels, Oxford and Tilghman Island, and attend the annual Waterfowl Festival.



The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at EASTON MUNICIPAL AIRPORT (ESN)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	110	Local	15,000
Multi-Engine	16	Itinerant	60,000
Jet	14	Air Taxi	10,000
		Military	5,000
Total Aircraft	140	Total Operations	90,000

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Easton Municipal Airport. These include at-airport expenditures on fuel sales, aircraft and avionic repair, aircraft charter and rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

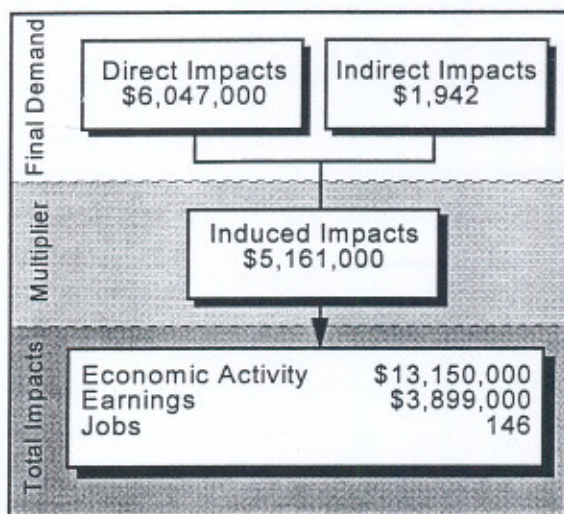
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Easton Municipal Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$384,000.

For further information regarding Easton Muni. Airport please contact:

Joseph B. Marsh
29137 Newnam Road, Unit 1
Easton, MD 21601
Phone: (410) 822-8560
Fax: (410) 822-8694

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757

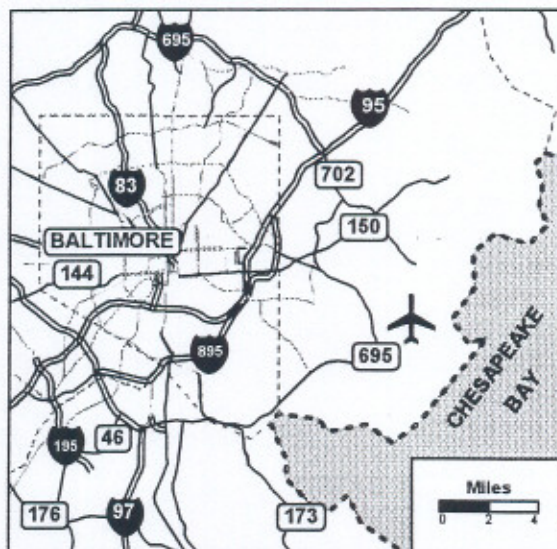


ECONOMIC IMPACT OF ESSEX SKYPARK (W48)

Essex Skypark is a small privately owned general aviation airport located on the Back River which runs into the Chesapeake Bay. In addition to the 2,084' asphalt runway, the airport offers a 3000' water runway which is primarily used by ultra-light seaplanes, although some seaplane flight instruction occasionally is conducted at the airport. Other services available at the airport include T-hangar rentals, and turf tiedown areas.

The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports.



The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at ESSEX SKYPARK (W48)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	40	Local	3,000
Ultra-Lights	2	Itinerant	500
Total Aircraft	42	Total Operations	3,500

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Essex Skypark. These include at-airport expenditures on fuel sales, aircraft and avionics repair, aircraft charter and rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

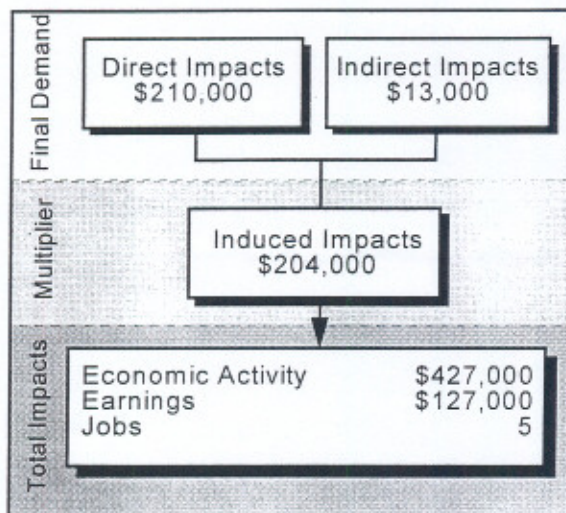
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Essex Skypark Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$12,000.

For further information regarding Essex Skypark please contact:

Jim Montgomery
4132 Beachwood Road
Baltimore, MD 21222
Phone: (410) 477-1971

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757



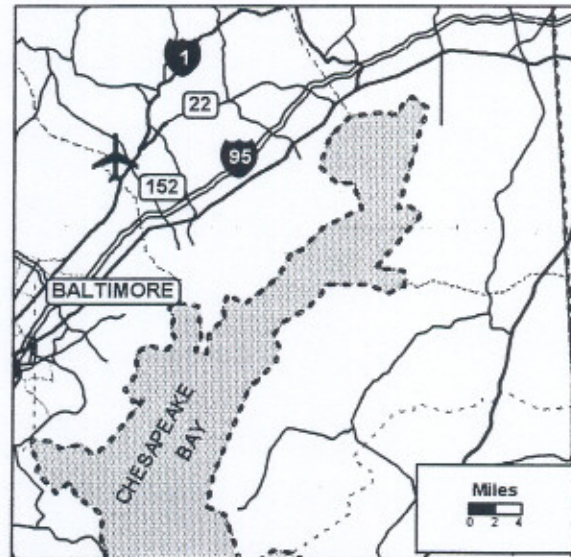
ECONOMIC IMPACT OF FALLSTON AIRPORT (W42)

Fallston Airport is a small privately owned general aviation airport located north of Baltimore. The single 2,150' asphalt runway primarily accommodates local recreational flyers. In doing so the airport provides the following services:

- Fuel (100LL)
- Minor powerplant and airframe repair
- Aircraft rental
- T-hangars
- Paved & turf tiedowns

The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports.



The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at FALLSTON AIRPORT (W42)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	<u>42</u>	Local	2,190
		Itinerant	1,460
		Military	<u>100</u>
Total Aircraft	42	Total Operations	3,750

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Fallston Airport. These include at-airport expenditures on fuel sales, aircraft repair, aircraft rental, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

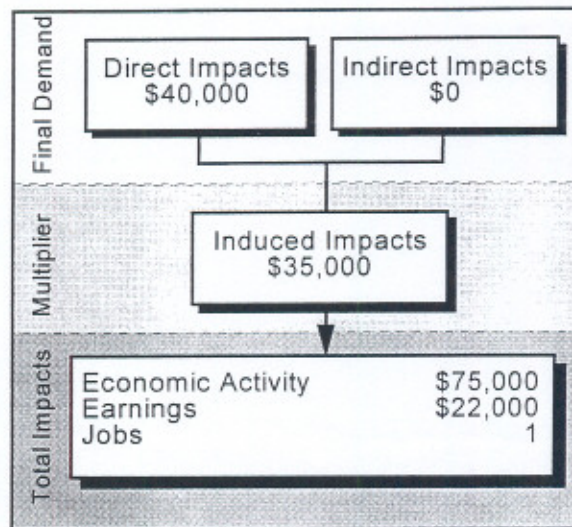
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Fallston Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$2,000.

For further information regarding Fallston Airport please contact:

Fred Mills
711 Reckord Road
Fallston, MD 21047
Phone: (410) 877-9889

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757

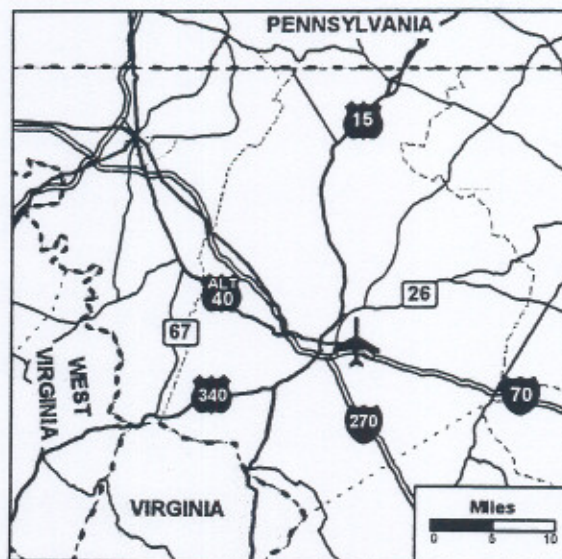


ECONOMIC IMPACT OF FREDERICK MUNICIPAL AIRPORT (FDK)

Located at the junction of I-70 and I-270, Frederick provides direct interstate access to both Baltimore and Washington, D.C. This and other factors have led to significant local population growth and economic development, which are accommodated by the airport's well developed air side facilities. Combined, these factors result in the Frederick Municipal Airport enjoying the second highest level of based aircraft and aircraft operations in Maryland. In doing so, the following services are offered at the airport:

- ✈ Fuel sales (100LL and Jet A)
- ✈ Major and minor powerplant repair
- ✈ Major and minor airframe repair
- ✈ Avionics repair
- ✈ Aircraft charter & rental
- ✈ Flight instruction
- ✈ Aircraft maint. community college
- ✈ Airport restaurant
- ✈ Other services include: gliders, sales, towing & aerial photography

In addition to these services, the Aircraft Owners and Pilots Association (AOPA) and AVEMCO, a major aviation insurance provider, are located immediately adjacent to the airport.



The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at FREDERICK MUNICIPAL AIRPORT

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	184	Local	148,038
Multi-Engine	40	Itinerant	37,009
Jet	5	Air Taxi	2,879
Helicopter	17	Military	1,226
Gliders	20		
Total Aircraft	266	Total Operations	189,152

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Frederick Muni. Airport. These include at-airport expenditures on fuel sales, aircraft and avionic repair, aircraft charter and rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents, as well as by the two off-airport business dependent on the airport (AOPA & AVEMCO).

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

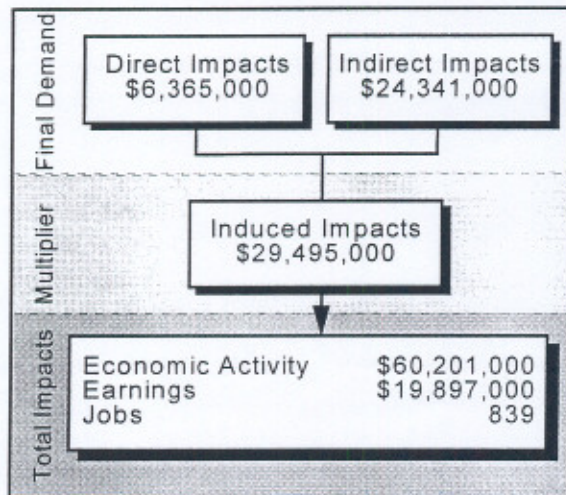
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Frederick Muni. Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$2.0 million.

For further information regarding Frederick Muni. Airport please contact:

Charles M. Abell
D.O.P.W., 111 Airport Drive E.
Frederick, MD 21701
Phone: (301) 846-2201
Fax: (301) 663-5373

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757

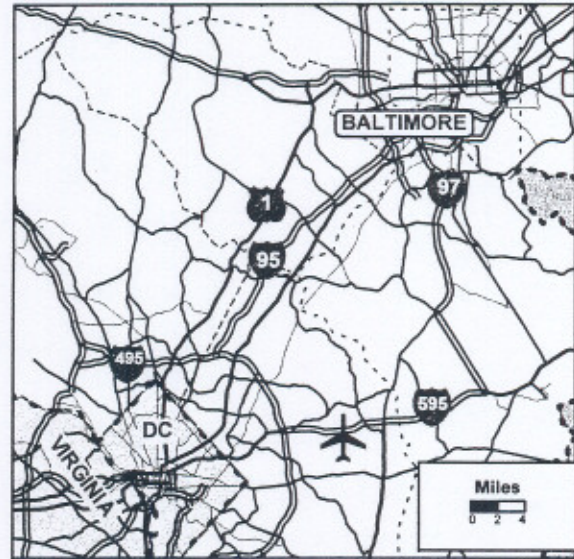


ECONOMIC IMPACT OF FREEWAY AIRPORT (W00)

Freeway Airport is a small but active, privately owned general aviation airport located next to US 50, approximately 15 miles east from downtown Washington, DC. Home to over a hundred based aircraft, the single 2,425' asphalt runway primarily accommodates local recreational flyers and those undergoing flight instruction. In addition, the airport's proximity to the city attracts some out-of-state pilots who wish to visit the nation's capital. In summary, the airport provides the following services:

- ✈ Fuel (100LL)
- ✈ Major & minor powerplant repair
- ✈ Major & minor airframe repair
- ✈ Aircraft rental
- ✈ Flight instruction
- ✈ Paved & turf tiedowns

The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.



To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at FREEWAY AIRPORT (W00)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	97	Local	24,000
Multi-Engine	3	Itinerant	4,300
Ultra-Lights	2	Air Taxi	80
		Military	300
Total Aircraft	102	Total Operations	28,680

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Freeway Airport. These include at-airport expenditures on fuel sales, aircraft repair, aircraft rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

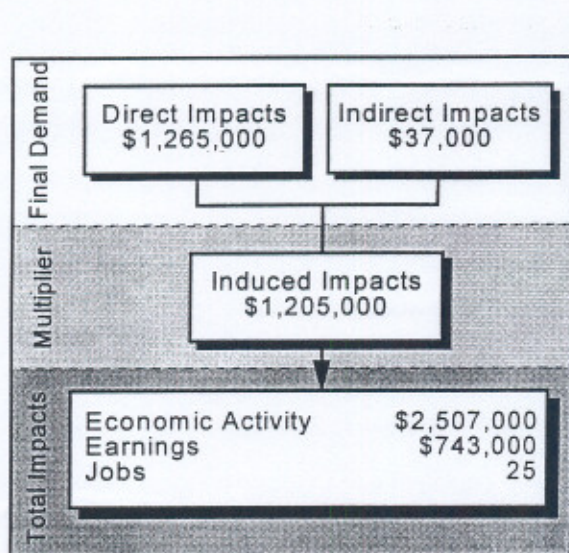
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Freeway Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$73,000.

For further information regarding Freeway Airport please contact:

Stanley Rodenhauser
3900 Church Road
Mitchellville, MD 20721
Phone: (301) 390-6424

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757

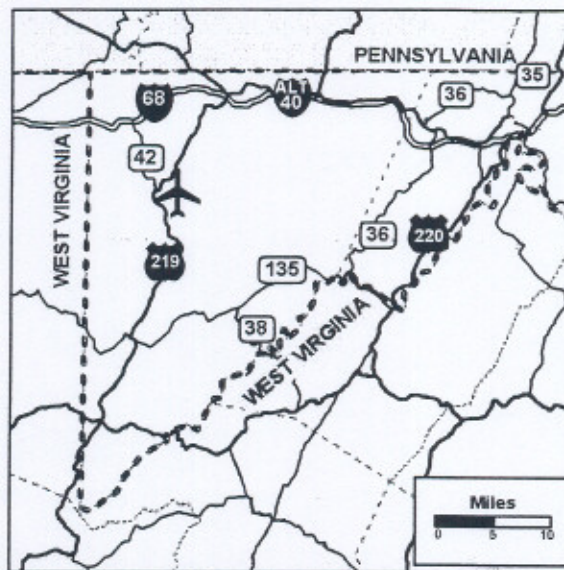


ECONOMIC IMPACT OF GARRETT COUNTY AIRPORT (2G4)

Garrett County airport is a small, but essential general aviation airport surrounded by the scenic mountains of Western Maryland. Currently, the airport does not generate huge economic impacts on the region. Rather, the airport assumes a quiet, necessary role that enhances the region's tourist industry and provides emergency air service evacuation and landing facilities. Services offered at the airport include:

- ✈ Aircraft charter & rental
- ✈ Fuel sales (80oct & 100LL)
- ✈ Flight instruction
- ✈ Corporate flight departments
- ✈ T-hangars and paved tiedowns
- ✈ Banner towing & scenic rides
- ✈ Automobile rental and/or courtesy car

Located between the Baltimore-Washington metro area and Pittsburgh, Garrett County offers short flying times to visitors from major nearby population centers. Efforts currently are underway to extend the 3,000' runway by an additional 1,200', which would enable the airport to accommodate larger aircraft. By doing so, the airport could attract additional visitors to the Deep Creek Lake resort area's golf, water and ski attractions.



The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at GARRETT COUNTY AIRPORT (2G4)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	12	Local	1,000
Multi-Engine	5	Itinerant	900
Helicopter	1	Air Taxi	450
		Military	150
Total Aircraft	18	Total Operations	2,500

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Garrett County Airport. These include at-airport expenditures on fuel sales, aircraft and avionics repair, aircraft charter and rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

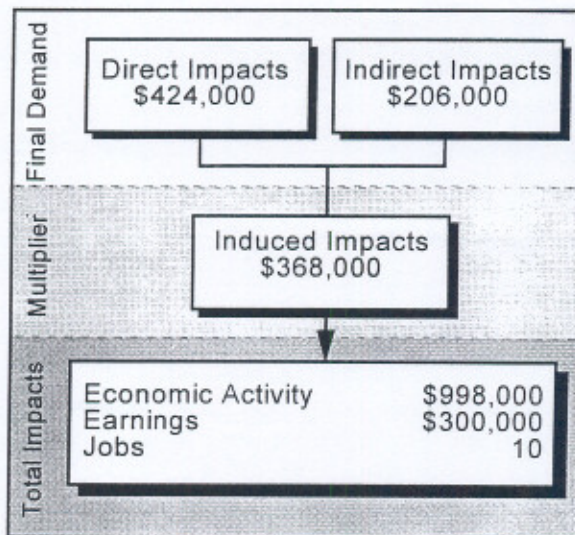
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Garrett County Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$30,000.

For further information regarding Garrett County Airport please contact:

Brenda Dolan
PO Box 305
McHenry, MD 21541
Phone: (301) 387-4100
Fax: (301) 387-4100

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757



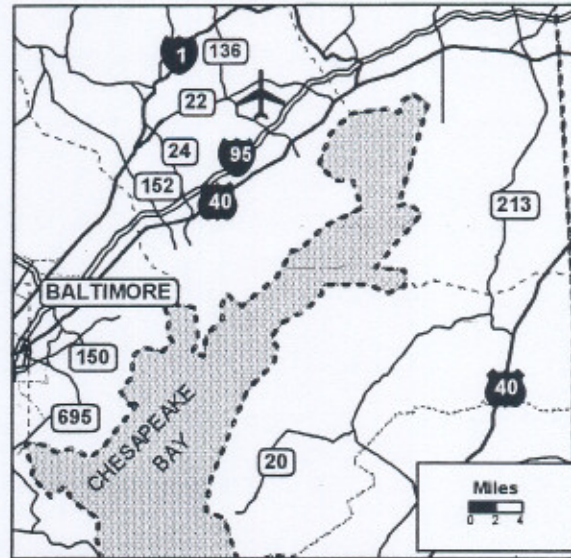
ECONOMIC IMPACT OF HARFORD COUNTY AIRPORT (0W3)

Harford County Airport is a small but active, privately owned general aviation airport located approximately six miles north of I-95 and Aberdeen. Home to over fifty based aircraft, the airport offers a 2,140' asphalt runway and a secondary 1,600' turf runway.

The airport primarily accommodates local sport and recreational flyers, including a comprehensive mail order service and flight instruction. The secondary turf runway is chiefly used for ultra-light and glider activity. In summary, the airport provides the following services:

- Fuel (100LL)
- Major powerplant repair
- Major airframe repair
- Parts supply
- Aircraft rental
- Flight instruction
- Community & T-hangars
- Paved & turf tiedowns

The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.



To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at HARFORD COUNTY AIRPORT (0W3)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	41	Local	15,600
Multi-Engine	2	Itinerant	2,500
Gliders	4	Military	<u>175</u>
Total Aircraft	47	Total Operations	18,275

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Harford County Airport. These include at-airport expenditures on fuel sales, aircraft repair, aircraft rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

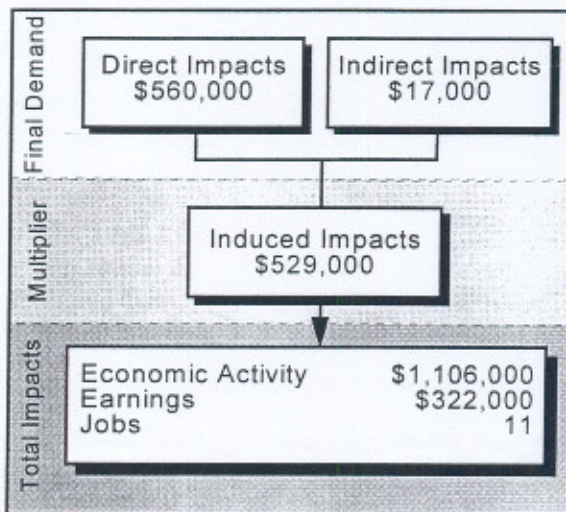
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Harford County Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$32,000.

For further information regarding Harford County Airport please contact:

Joseph Kesser
1104 Oak Ridge Court
Bel Air, MD 21014-2745
Phone: (410) 836-2025

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757



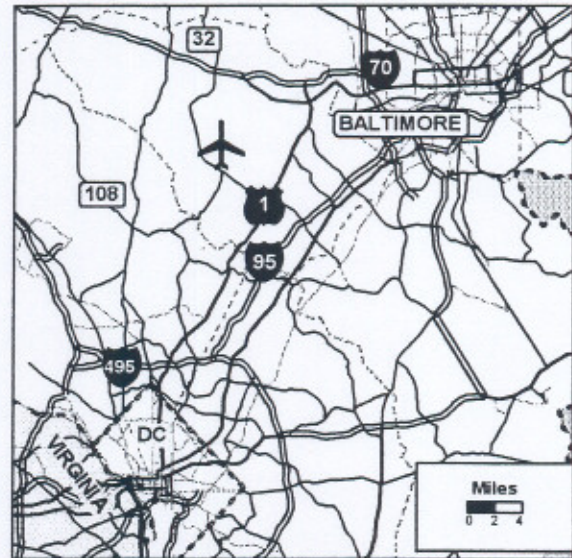
ECONOMIC IMPACT OF HAYSFIELD (MD24)

Haysfield is a small, quiet family owned general aviation airport located in Central rural Maryland. The 2,400 turf runway and surrounding facilities were designed to serve the needs of local flying enthusiasts and those who wish to obtain recreational pilot licenses. In doing so, the following services are provided:

- ✈ Powerplant and airframe repair
- ✈ Aircraft rental
- ✈ Flight instruction
- ✈ Turf tiedowns

The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports.



The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at HAYSFIELD (MD24)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	50	Local	4,800
Total Aircraft	50	Total Operations	4,800

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Haysfield. These include at-airport expenditures on aircraft repair, aircraft rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

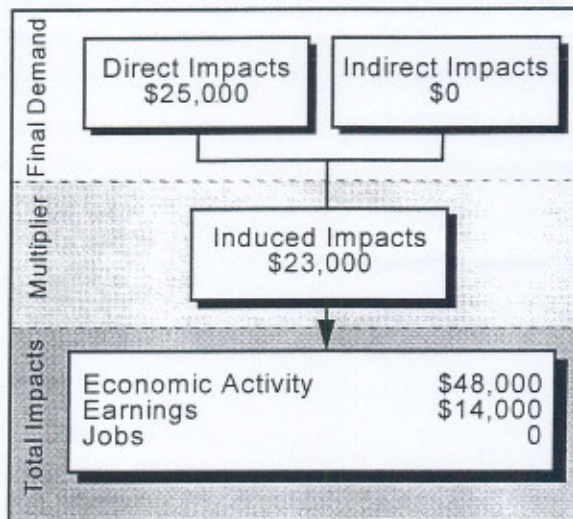
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Haysfield Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$1,000.

For further information regarding Haysfield please contact:

Patricia Bassler
4994 Sheppard Lane
Ellicott City, MD 21042
Phone: (410) 531-3993
Fax: (410) 531-2193

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757



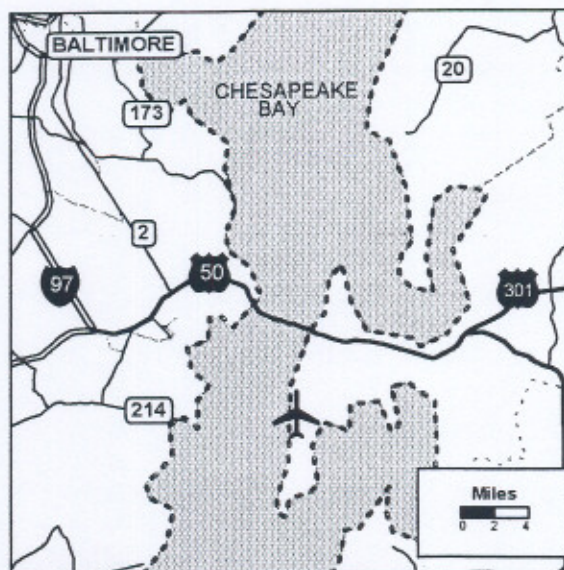
ECONOMIC IMPACT OF KENTMORR AIRPARK (3W3)

The Kentmorr Airpark is a small public-use airport located on Kent Island approximately five miles south of the Bay Bridge. The airport's 2,050' runway and 16 based aircraft are owned and operated by the local homeowners association.

Established as a residential airpark, no commercial services are offered at Kentmorr. However, the airport does provide easy and convenient access to a restaurant and marina which are located a short quarter mile walk from the end of the runway. The restaurant is one of the best on the bay, drawing many out-of state patrons for waterfront dining or steamed crabs "to go". Charter boats also are available at the marina for bay fishing or sightseeing cruises.

In general, the airpark prides itself in maintaining a relaxing picnic area by the bay for those who simply wish to sit and admire the view.

The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.



To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at KENTMORR AIRPARK (3W3)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	17	Local	1,230
Multi-Engine	1	Itinerant	5,150
		Military	20
Total Aircraft	18	Total Operations	6,400

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Kentmorr Airpark. These include at-airport expenditures on aircraft repair, airport repairs, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

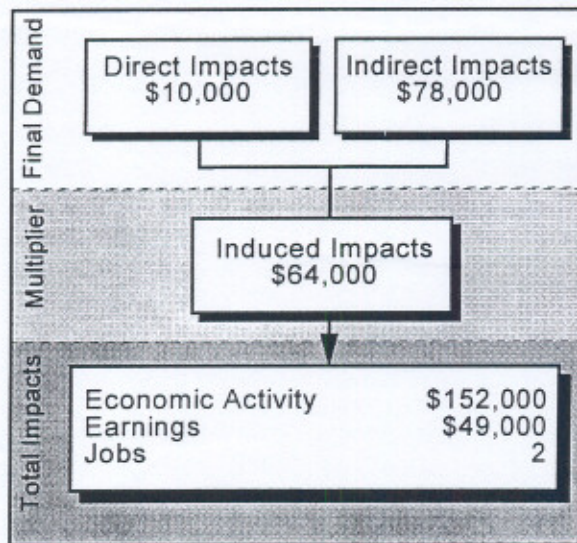
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Kentmorr Airpark Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$5,000.

For further information regarding Kentmorr Airpark please contact:

Rodger Guest
120 Kentmorr Road
Stevensville, MD 21666
Phone: (410) 643-1770

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757

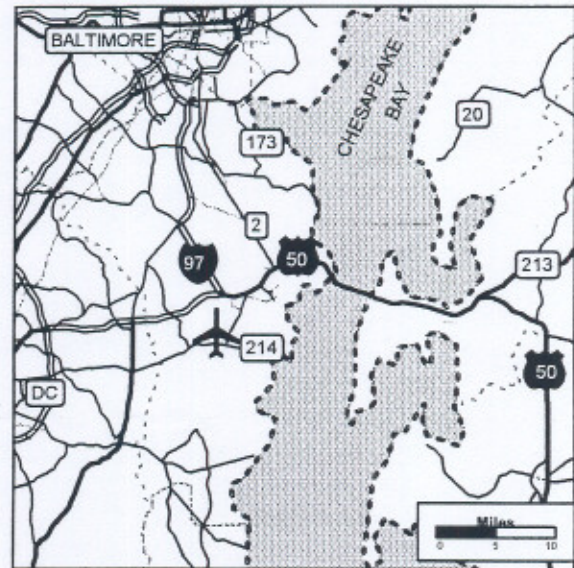


ECONOMIC IMPACT OF LEE AIRPORT (ANP)

Lee Airport is an active family-run airport located a short distance from historic downtown Annapolis, MD. Dating back to the 1940's the airport's unique, friendly atmosphere includes park-like grounds with benches and picnic tables, and a pilot's lounge. A reputable maintenance facility and a Civil Air Patrol unit also are located at the airport. Specific aviation related services available at the airport include:

- ✈ Fuel sales (100LL)
- ✈ Major & minor powerplant repair
- ✈ Major & minor airframe repair
- ✈ Aircraft rental
- ✈ Flight instruction
- ✈ T-hangers and turf tiedowns
- ✈ Aerial photography
- ✈ Prearranged taxis & car rentals

In addition to the local recreational enthusiasts who base over 130 aircraft at Lee, the airport's relaxed, comfortable atmosphere attracts visitors to the airport's 2,505' asphalt runway. With numerous restaurants within walking distance, day visitors are accommodated without requiring ground transportation. Others, drawn by the area's historic and water recreational attractions, can find hotel accommodations close to the airport.



The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at LEE AIRPORT (ANP)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	100	Local	10,000
Multi-Engine	30	Itinerant	6,000
Helicopter	1	Air Taxi	150
		Military	50
Total Aircraft	131	Total Operations	16,200

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Lee Airport. These include at-airport expenditures on fuel sales, aircraft and avionic repair, aircraft charter and rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

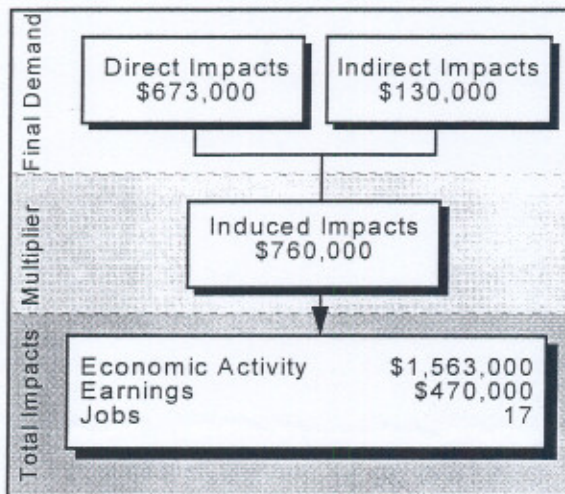
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Lee Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$46,000.

For further information regarding Lee Airport please contact:

Thomas F. Parlett, Sr.
PO Box 273
Edgewater, MD 21037
Phone: (410) 956-2114

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757



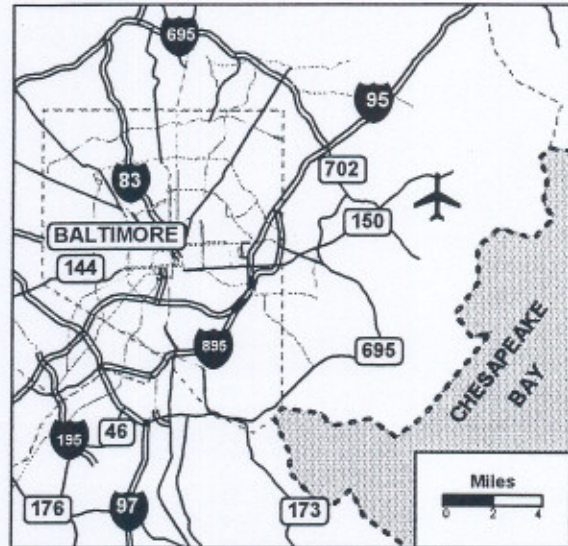
ECONOMIC IMPACT OF MARTIN STATE AIRPORT (MTN)

Constructed in the late 1930's, Martin State Airport played an active role in the WWII production of military aircraft and aircraft components. This aircraft production provided an impetus to the community's development of a skilled labor force.

Today the general aviation reliever airport continues to provide skilled training, employment and business opportunities to the community. In addition, the airport is home to Maryland's Air National Guard (MDANG), an extensive air base comprising citizen-airmen who help maintain the nation's capability to meet world-wide mobility deployment requirements.

The annual Chesapeake Airshow and other local Chamber of Commerce events exemplify the airport's continued positive interaction with the community. The wide range of aviation services currently available at MTN include:

- ➔ Aircraft sales, charter & rental
- ➔ Fuel sales (100LL and Jet A)
- ➔ Avionics repair
- ➔ Flight and mechanic schooling
- ➔ Computerized testing
- ➔ Aircraft component manufacturing
- ➔ Baltimore City & Co. Police
- ➔ MD State Police MEDEVAC
- ➔ Community & T-hangars, & tiedowns
- ➔ Corporate flight departments
- ➔ Automobile rental



The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at MARTIN STATE AIRPORT (MTN)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	206	Local	48,214
Multi-Engine	23	Itinerant	66,302
Jet	13	Air Taxi	117
Helicopter	29	Military	9,736
Military	31		
Total Aircraft	302	Total Operations	124,369

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Martin State Airport. These include at-airport expenditures on fuel sales, aircraft and avionics repair, aircraft charter and rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

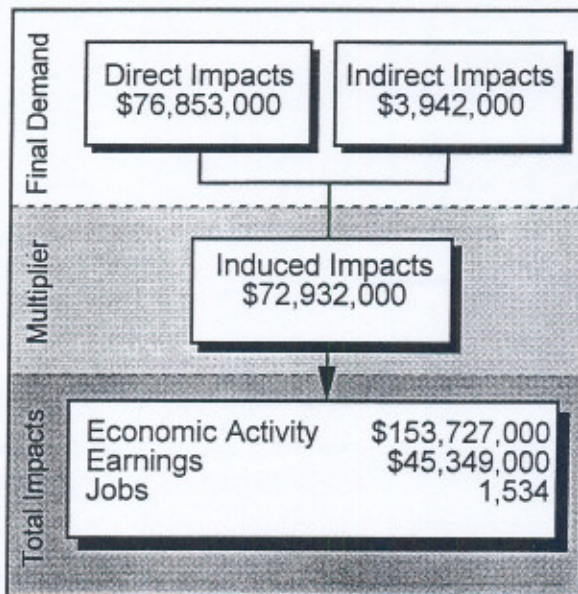
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Martin State Airport Impacts



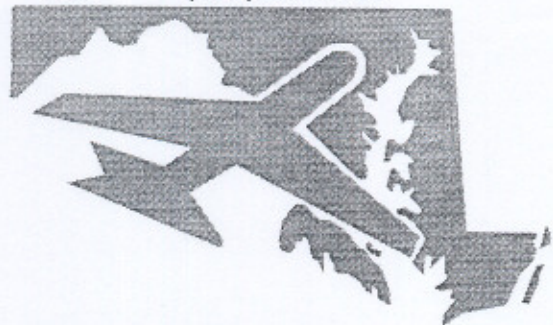
State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$4.5 million.

For further information regarding Martin State Airport please contact:

Jake R. West
Box 1, 701 Wilson Point Road
Baltimore, MD 21220
Phone: (410) 682-8800
Fax: (410) 692-8822

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757

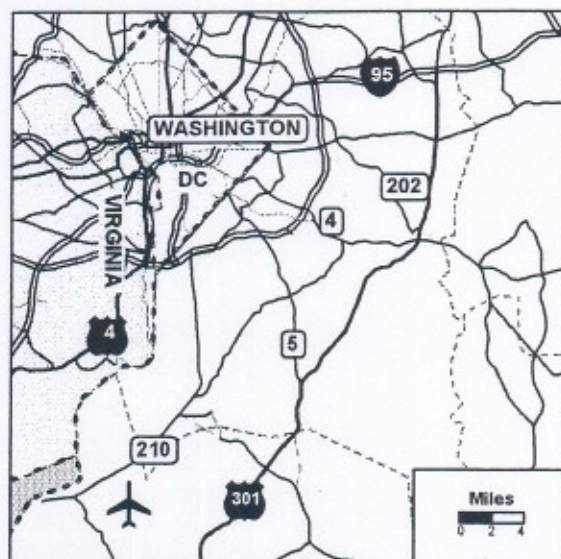


ECONOMIC IMPACT OF MARYLAND AIRPORT (2W5)

Maryland Airport is a small, but active privately owned general aviation airport south of the nation's capital. Open to the general public, the airport offers both a 3,000' asphalt runway and a 1,780' turf runway. The two fixed based operators provide a broad range of services to the local area's recreational flyers as well as to transient visitors. These services include:

- ✈ Fuel sales (100LL)
- ✈ Major & minor powerplant repair
- ✈ Major & minor airframe repair
- ✈ Avionics repair
- ✈ Aircraft charter & rental
- ✈ Flight instruction
- ✈ Community & T-hangars
- ✈ Paved & turf tiedowns

The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.



To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at MARYLAND AIRPORT (2W5)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	67	Local	15,000
Multi-Engine	<u>8</u>	Itinerant	10,000
		Air Taxi	200
		Military	<u>200</u>
Total Aircraft	75	Total Operations	25,400

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Maryland Airport. These include at-airport expenditures on fuel sales, aircraft and avionic repair, aircraft charter and rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

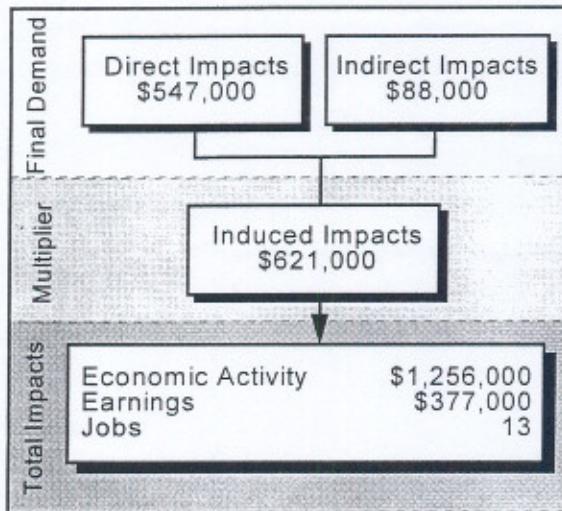
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Maryland Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$37,000.

For further information regarding Maryland Airport please contact:

John K. Crawford
3830 Livingston Road
Indian Head, MD 20640
Phone: (301) 283-6202

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757

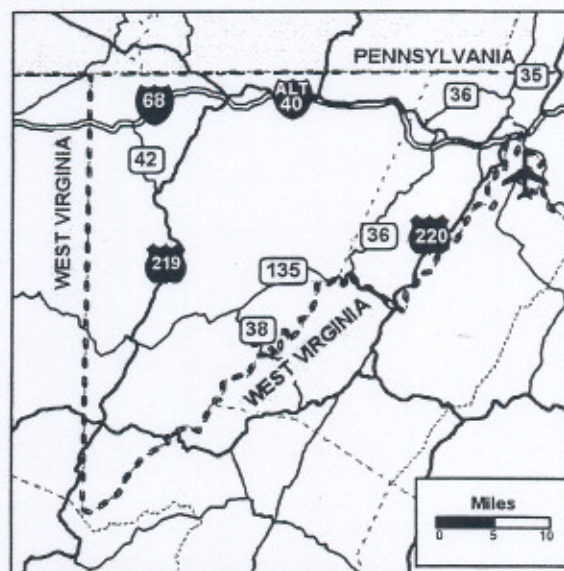


ECONOMIC IMPACT OF MEXICO FARMS AIRPORT (1W3)

Opened in 1929, the Mexico Farms airport is the second-oldest continually operating airport in the United States. The small privately owned general aviation airport is located near the City of Cumberland, in Western Maryland. The two 2,100 turf runways are located next to the Potomac River. Although there are no services available at the airport, specialized turf-field flight training is conducted, and Experimental Aircraft Association fly-in activities are hosted.

The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports.



The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at MEXICO FARMS AIRPORT (1W3)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	21	Local	3,900
Ultra-Lights	4	Itinerant	800
Total Aircraft	25	Total Operations	4,700

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Mexico Farms Airport. These include at-airport expenditures on aircraft repair, aircraft rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

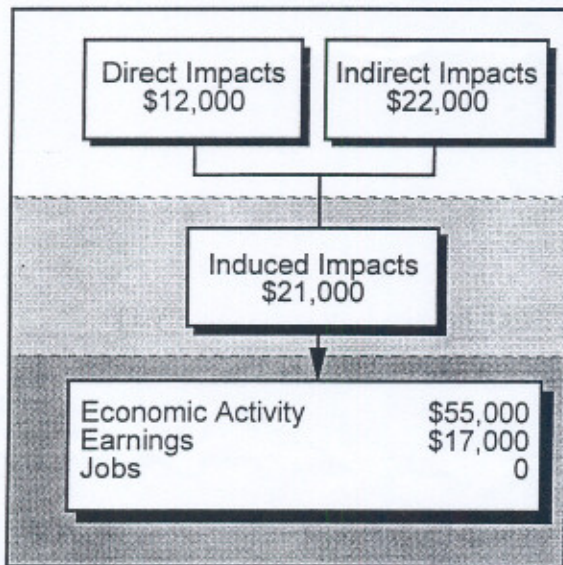
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Mexico Farms Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$3,000.

For further information regarding Mexico Farms Airport please contact:

Donald F. Johnson
14112 Airport Lane S.E.
Cumberland, MD 21502
Phone: (301) 724-3045

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757



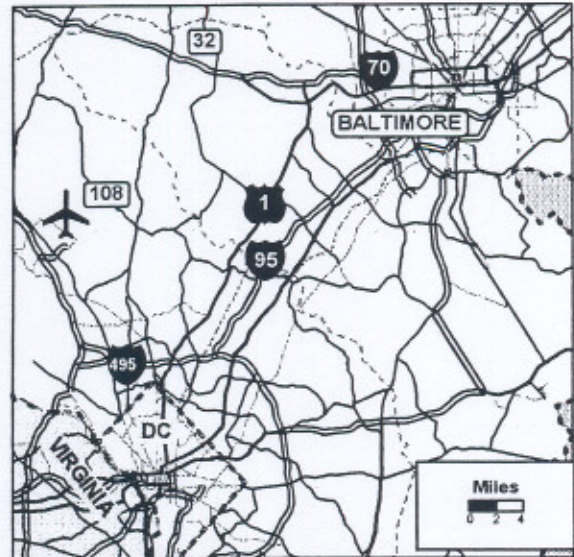
ECONOMIC IMPACT OF MONTGOMERY COUNTY AIRPARK (GAI)

The Montgomery County Airpark was originally designed to combine a general aviation airport with an industrial park of warehouses and office buildings. Today the airpark is Maryland's fourth busiest airport located in the heart of the I-270 Technology Corridor near Washington, DC, and is surrounded on three sides by a thriving industrial park.

The airport supports flight schools, maintenance shops, flying clubs, a Civil Air Patrol Squadron, the United States Coast Guard Auxiliary, County Police, airborne traffic reports, AirLifeLine (volunteer transport of critically ill patients and organs), and other organizations. Services offered at the airport include:

- Aircraft charter & rental
- Fuel sales (100LL and Jet A)
- Major and minor powerplant repair
- Minor airframe repair
- Avionics repair
- Flight instruction
- Air freight
- Corporate flight departments
- Airport restaurant

Visiting aircraft accommodated by the airpark often include executives, politicians and other visitors from across the national as well as Canada and Latin America.



The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at MONTGOMERY COUNTY AIRPARK (GAI)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	200	Local	61,500
Multi-Engine	35	Itinerant	38,100
Jet	2	Air Taxi	10,700
Helicopter	4	Military	5
Total Aircraft	241	Total Operations	110,305

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Montgomery County Airpark. These include at-airport expenditures on fuel sales, aircraft and avionic repair, aircraft charter and rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

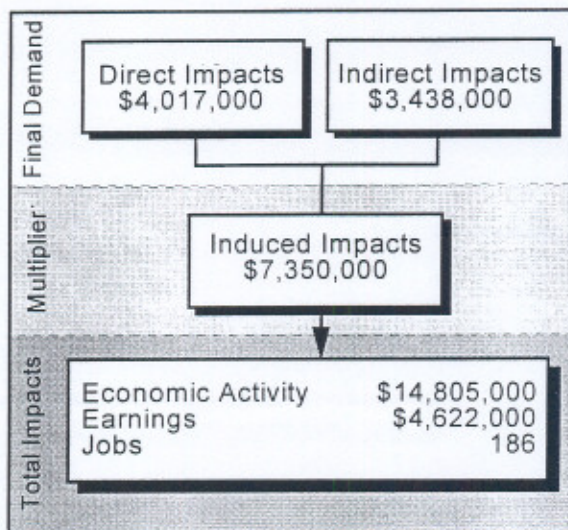
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Montgomery County Airpark Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$455,000.

For further information regarding Montgomery County Airpark please contact:

Doug McNeeley
c/o Freestate Av.
7940 Airpark Road
Gaithersburg, MD 20879-4160
Phone: (301) 963-7100
Fax: (301) 330-6750

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757



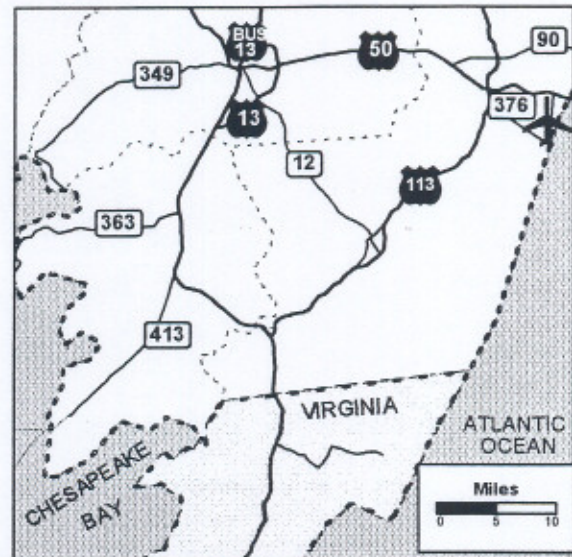
ECONOMIC IMPACT OF OCEAN CITY MUNICIPAL AIRPORT (N80)

Ocean City Airport is the aviation gateway to Maryland's beaches, famed steamed crabs and numerous ocean resort golf courses and convention center. Because of its proximity to the Delmarva's barrier islands the airport attracts many visitors from around the east coast during the summer months. In doing so, the airport provides a vital component to the area's thriving tourist industry.

Formerly a commercial service airport, Ocean City has two asphalt/concrete runways with lengths of 4,070' and 3,200'. Services currently provided at the airport include:

- ➔ Fuel sales (100LL & Jet A)
- ➔ Major & minor powerplant repair
- ➔ Major & minor airframe repair
- ➔ Flight & sky diving instruction
- ➔ Community & T-hangars
- ➔ Paved tiedowns
- ➔ Bus transport available in summer
- ➔ Computer-based FAA exam service

The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.



To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at OCEAN CITY MUNICIPAL AIRPORT (N80)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	23	Local	6,000
Multi-Engine	4	Itinerant	700
Ultra-Lights	1	Military	36
Total Aircraft	28	Total Operations	6,736

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Ocean City Municipal Airport. These include at-airport expenditures on fuel sales, aircraft repair, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

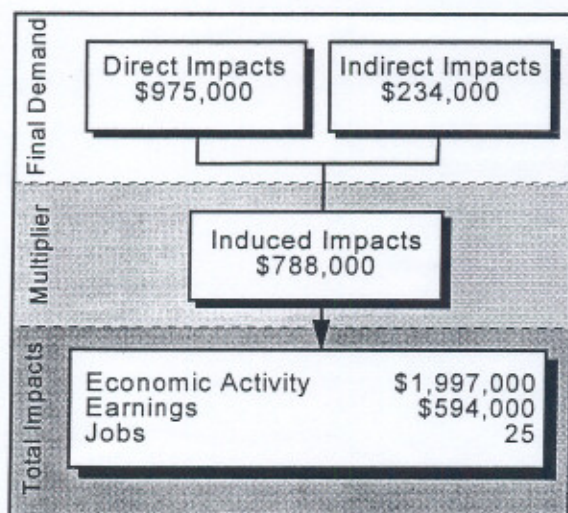
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Ocean City Municipal Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$58,000.

For further information regarding Ocean City Municipal Airport please contact:

Donald Stewart
PO Box 476
Ocean City, MD 21842
Phone: (410) 213-2471

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757



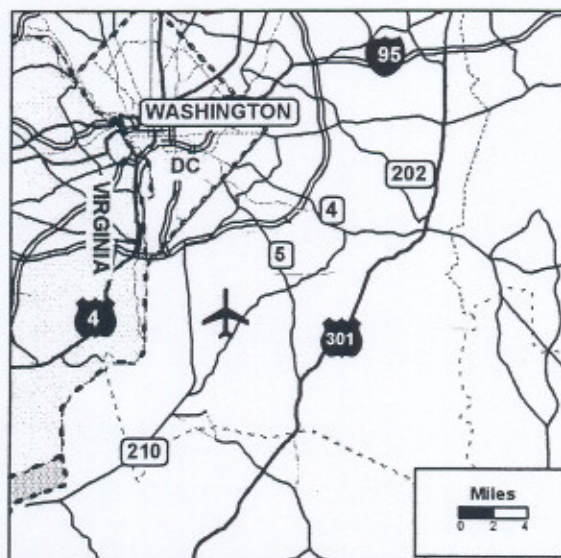
ECONOMIC IMPACT OF POTOMAC AIRPARK (VKX)

Potomac Airfield's unique location close to Washington, D.C. readily accomodates downtown and suburban aviation users, including those in Old Towne Alexandria. The well-maintained airfield uniquely combines the charm and friendliness of an effcient country airport with the latest in aviation technology and modern conveniences. It offers pilots the safest and most desireable facility from which to fly, while preserving a pleasant country atmosphere for its neighbors.

Specific services available to aviators who use Potomac's 2,665' asphalt runway include:

- Fuel sales (80oct & 100LL)
- Major powerplant repair
- Major airframe repair
- Avionics repair
- Aircraft charter & rental
- Flight instruction
- Community & T-hangars
- Turf tiedowns

While numerous military and civilian pilots populate the airfield, the four active flying clubs introduce hundreds of new pilots, both young and old, to aviation. On a nice weekend both flying and non-flying families enjoy Potomac's bucolic setting with a picnic at the airfield's facilities.



The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at POTOMAC AIRPARK (VKX)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	98	Local	45,000
Multi-Engine	5	Itinerant	500
Ultra-Lights	4	Military	100
Total Aircraft	107	Total Operations	45,600

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Potomac Airpark. These include at-airport expenditures on fuel sales, aircraft and avionics repair, aircraft charter and rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

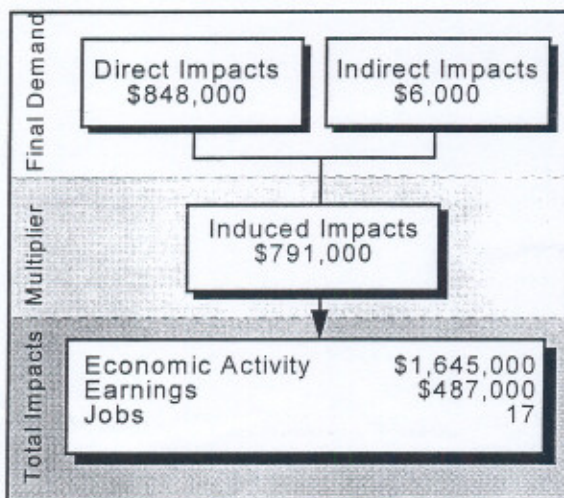
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Potomac Airpark Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$48 million.

For further information regarding Potomac Airpark please contact:

David Wartofsky
10300 Glen Way
Ft. Washington, MD 20744
Phone: (301) 248-5720
Fax: (301) 248-3997

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757



ECONOMIC IMPACT OF RAINTREE AIRPARK (58M)

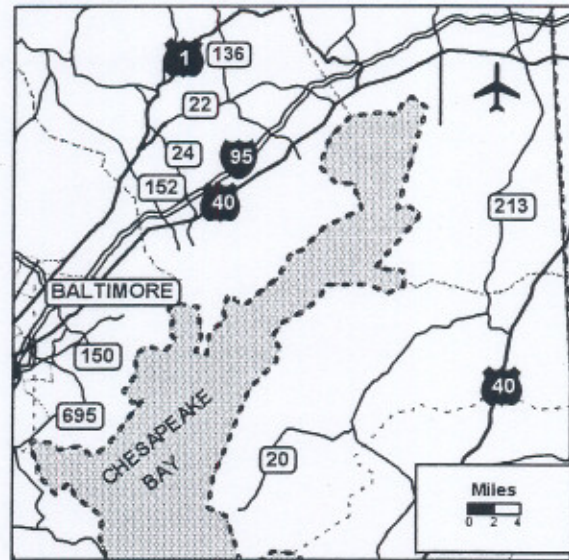
Raintree Airpark is located at the head of the Chesapeake Bay, adjacent to marinas, a campground, and state park shore and forest facilities. Just a short distance from Baltimore and Philadelphia, and away from congested airspace, Raintree offers an attractive pilot fly-in. Aviation users will find a friendly mix of grass roots aviation, featuring aircraft rental tours of the Upper Chesapeake Bay and a nostalgic ride in a vintage WWII Steerman Biplane.

Specific aviation services offered to users of the 2,635' turf runway include:

- Fuel sales (80oct & 100LL)
- Major powerplant repair
- Major airframe repair
- Aircraft rentals and tours
- Flight instruction
- Community hangars & turf tiedowns
- Sky diving club

Numerous nearby motels and restaurants, with famed Chesapeake Bay seafood, also are available to guests. In addition, arrangements can be made for courtesy transportation or car rental.

The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.



To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports.

The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at RAINTREE AIRPARK (58M)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	18	Local	5,304
Gliders	1	Itinerant	1,081
Ultra-Lights	7	Military	77
Total Aircraft	26	Total Operations	6,462

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Raintree Airpark. These include at-airport expenditures on fuel sales, aircraft repair, aircraft rental and tours, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

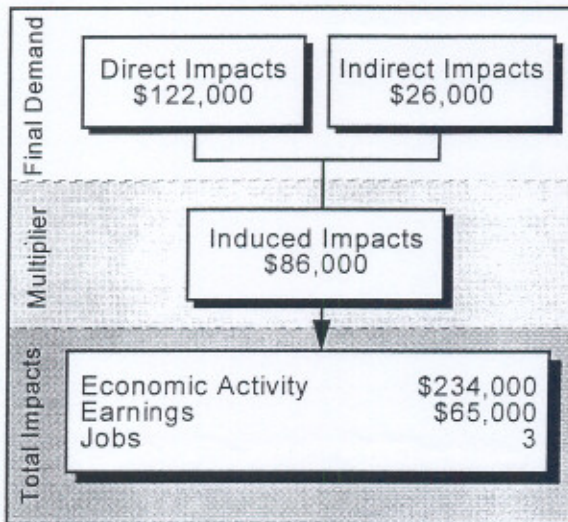
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Raintree Airpark Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$6,000.

For further information regarding Raintree Airpark please contact:

Robert Powell
PO Box 222, 166 Raintree Lane
Elkton, MD 21921
Phone: (410) 398-8594

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757



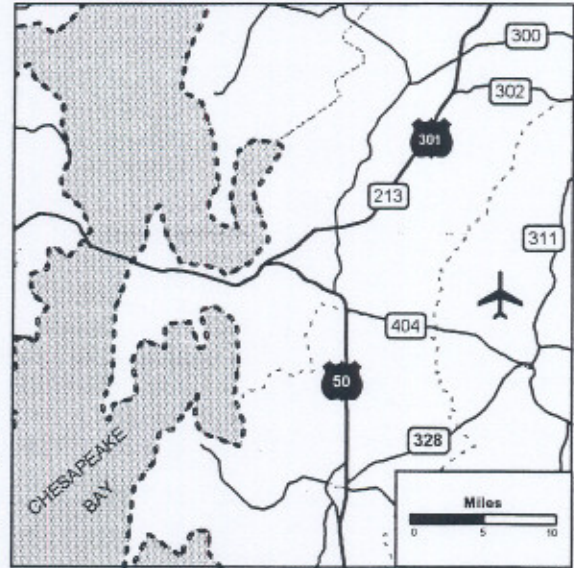
ECONOMIC IMPACT OF RIDGELY AIRPARK (1N0)

Ridgely Airpark is a small, but active privately owned general aviation airport located on the Delmarva Peninsula about 35 miles east of the Bay Bridge. The 3,200' asphalt runway attracts a significant volume of itinerant and air taxi visitor operations to the rural area. The airport's modest growth over the past few years has led to expanded services which now include:

- ✈ Fuel sales (100LL)
- ✈ Major powerplant repair
- ✈ Major airframe repair
- ✈ Aircraft rentals
- ✈ Flight instruction
- ✈ Community & T-hangars
- ✈ Paved & turf tiedowns

The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports.



The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at RIDGELY AIRPARK (1N0)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	12	Local	7,286
Multi-Engine	2	Itinerant	9,500
Gliders	1	Air Taxi	540
		Military	50
Total Aircraft	15	Total Operations	17,376

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Ridgely Airpark. These include at-airport expenditures on fuel sales, aircraft repair, aircraft rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

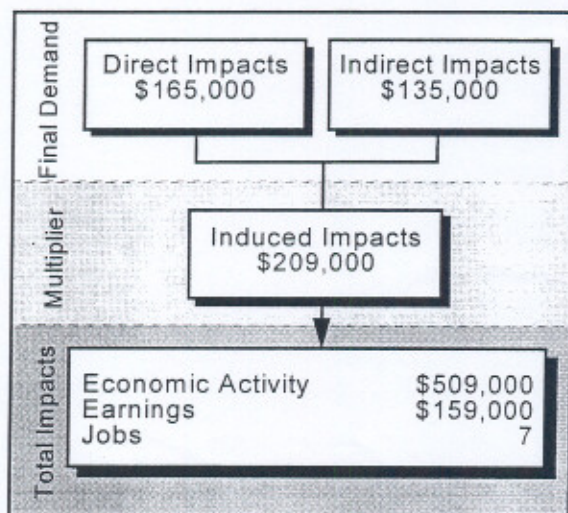
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Ridgely Airpark Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$16,000.

For further information regarding Ridgely Airpark please contact:

Thomas R. Davis
24030 Racetrack Road
Ridgely, MD 21660
Phone: (410) 634-2513

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757



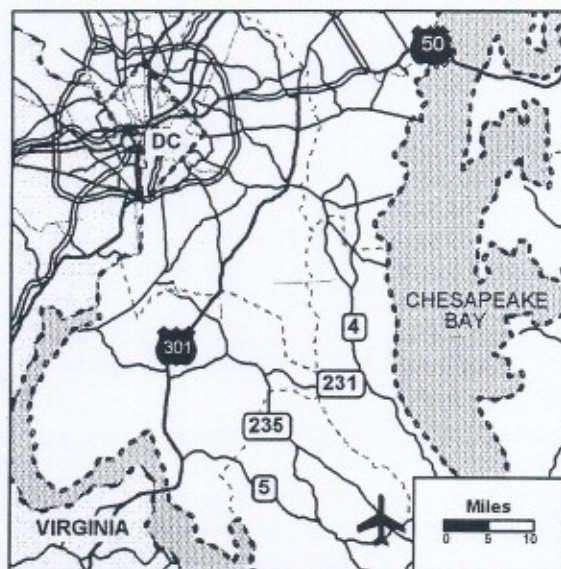
ECONOMIC IMPACT OF SAINT MARY'S COUNTY AIRPORT (2W6)

St. Mary's County Airport is located in southern Maryland approximately 65 miles from Washington, D.C. and 90 miles from Baltimore. For many years the airport primarily provided recreational aviation services to local enthusiasts and visitors. Today, St. Mary's provides essential aviation access to contractors, business people and government officials who commute between the rapidly expanding nearby Patuxent Naval Air Station and the Baltimore-Washington metropolitan area and beyond.

By accommodating the increasing need for air transport, the airport helped to enable the Air Station's recent expansion to approximately 16,000 employees, not to mention off-station employment growth. In doing so, St. Mary's County Airport offers the following services:

- Fuel sales (100LL and Jet A)
- Major & minor powerplant repair
- Major & minor airframe repair
- Avionics installation
- Aircraft sales, charter & rental
- Flight instruction
- T-hangars, paved & turf tiedown

The aviation and business activity at the airport generates considerable economic impacts on the local community, which creates jobs, generates taxes and facilitates business.



To measure the extent of these impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the next page.

The combined effect of the increased employment and business activity in the region has led to preliminary study of potential commercial air passenger service at St. Mary's. Such service would generate significant additional impacts to those presented below.

1995 AVIATION ACTIVITY at SAINT MARY'S COUNTY AIRPORT (2W6)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	76	Local Operations	38,316
Multi-Engine	5	Itinerant Operations	15,963
Helicopter	1	Air Taxi	2,122
		Military	50
Total Aircraft	82	Total Operations	56,451

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Saint Mary's County Airport. These include at-airport expenditures on fuel sales, aircraft and avionics repair, aircraft charter and rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

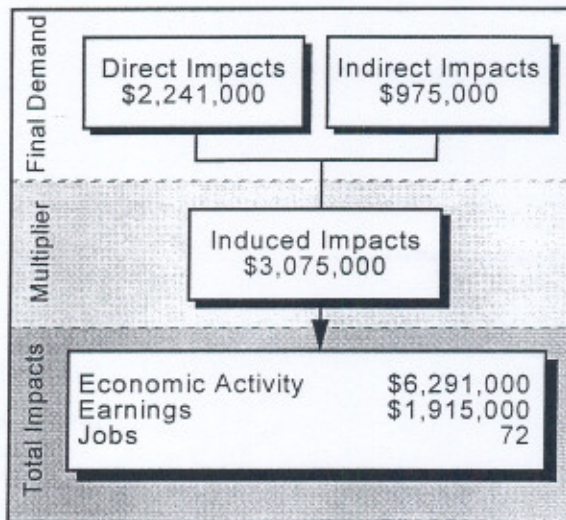
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Saint Mary's County Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$188,000.

For further information regarding Saint Mary's County Airport please contact:

James P. Haley
315 Airport Road, Suite 800
California, MD 20619
Phone: (301) 373-5416
Fax: (301) 373-4621

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757



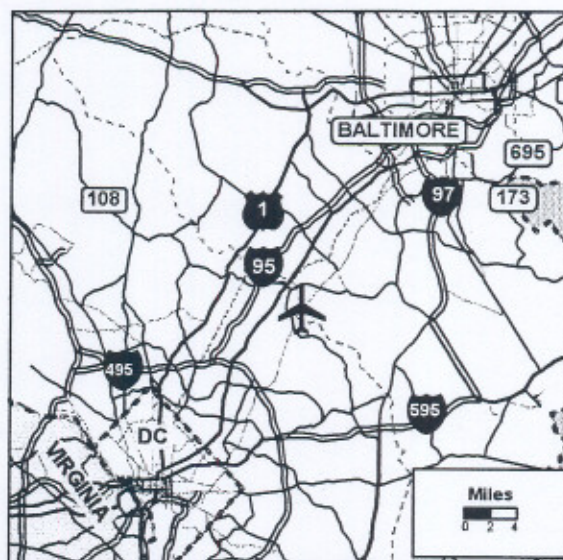
ECONOMIC IMPACT OF SUBURBAN AIRPORT (W18)

Suburban Airport is conveniently located between Baltimore and Washington, D.C., and only a five minute drive from a major national banking center in Laurel, MD. The airport has a 2,168' runway and offers the following services:

- Fuel sales (100LL)
- Major powerplant repair
- Major airframe repair
- Aircraft rentals
- Flight instruction
- Community hangars
- Turf tiedowns

In addition to a new fuel tank, the airport is planning to add 20 or more T-hangars and security fencing, as well as expanding its maintenance hanger and extending its runway. Recreational activities nearby include a major horse racing track, Annapolis and the Chesapeake Bay.

The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.



To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports. The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at SUBURBAN AIRPORT (W18)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	65	Local	20,000
		Itinerant	400
		Air Taxi	10
Total Aircraft	65	Total Operations	20,410

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Suburban Airport. These include at-airport expenditures on fuel sales, aircraft repair, aircraft rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

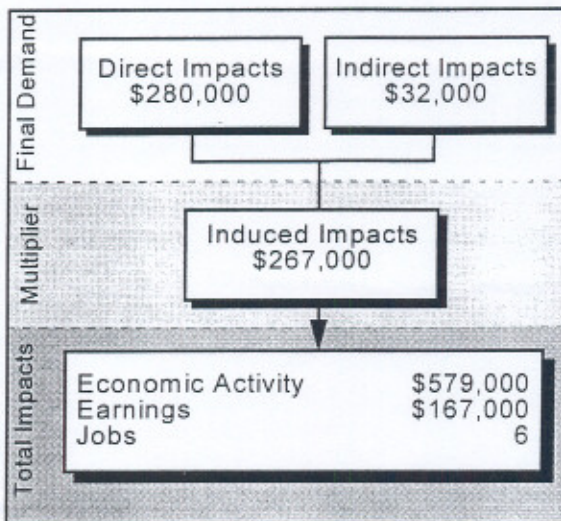
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Suburban Airport Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$16,000.

For further information regarding Suburban Airport please contact:

Charles H. Crew
520 Brock Bridge Road
Laurel, MD 20724
Phone: (301) 490-7580

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757



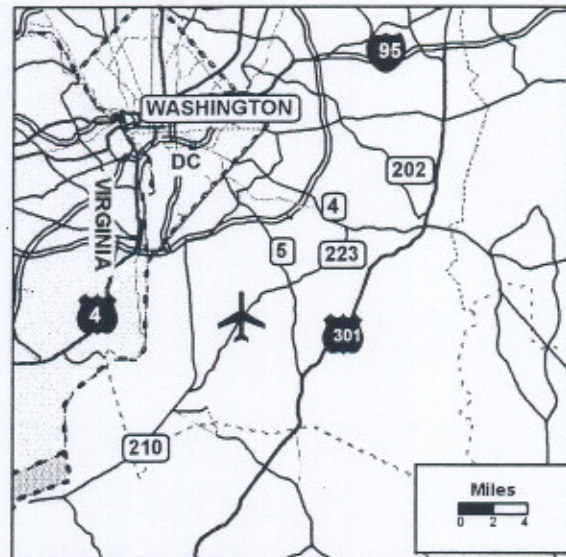
ECONOMIC IMPACT OF WASHINGTON EXECUTIVE/HYDE FIELD (W32)

Washington Executive Airport is a small, but very busy, privately owned general aviation facility. Located just south of Washington, DC, the airport is home to 130 aircraft. Originally opened in 1939, the airport currently supports local recreational flyers, flight instruction and several flying clubs. Specific services offered include:

- ✈ Fuel sales (100LL & Jet A)
- ✈ Major powerplant repair
- ✈ Major airframe repair
- ✈ Aircraft charter & rentals
- ✈ Flight instruction
- ✈ T-hangars
- ✈ Paved & turf tiedowns

The aviation and business activity at the airport helps to generate economic impacts on the local community, which creates jobs, generates taxes and facilitates business.

To measure the extent of these economic impacts, the Maryland Aviation Administration, recently conducted a state aviation systems plan, which included an economic impact study of all 35 public-use airports.



The analysis focused on the local economic roles and impacts of each airport. These impacts are explained and quantified on the following page.

1995 AVIATION ACTIVITY at WASHINGTON EXECUTIVE/HYDE FIELD (W32)

<u>Based Aircraft</u>		<u>Annual Aircraft Operations</u>	
Single Engine	110	Local	91,000
Multi-Engine	6	Itinerant	700
Helicopter	13	Air Taxi	300
Ultra-Lights	1	Military	<u>200</u>
Total Aircraft	130	Total Operations	92,200

Three Types of Impacts

Direct Impacts are created by the provision of aviation services at Washington Executive/Hyde Field. These include at-airport expenditures on fuel sales, aircraft repair, aircraft charter and rental, flight instruction, etc.

Indirect Impacts are created by the use of aviation services. These include off-airport local expenditures by visitors and residents.

Induced Impacts are a result of the multiplier effect caused by direct and indirect impacts. Induced impacts represent the additional jobs, earnings and economic activity that result as the money from final demand expenditures circulate through the local economy.

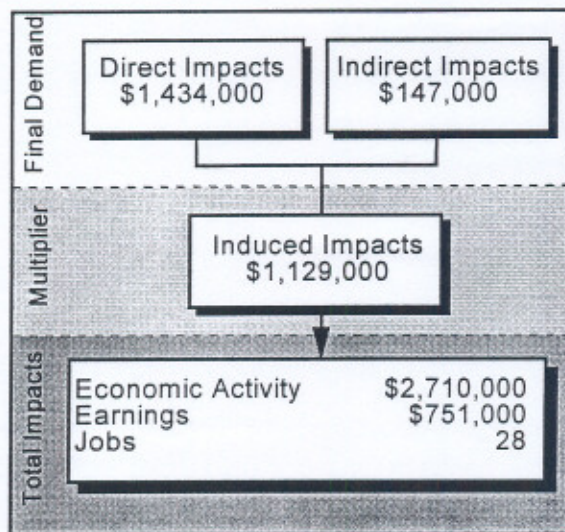
Three Impact Measures

Economic Activity measures the value of all aviation related services, plus the sum of all intermediate goods and services needed to produce or support aviation or its users.

Earnings measures the wages and salaries paid to all employed persons paid by the aviation industry, directly or indirectly, to deliver aviation services.

Jobs measures the number of people employed in the aviation industry and the aviation oriented share of those that are employed in sectors that support aviation operations. Jobs are expressed in terms of full-time equivalent jobs (i.e. two part-time jobs equal one full-time job).

Washington Executive/ Hyde Field Impacts



State and Local Tax Receipts generated by the three types of aviation impacts are included in the impacts shown above. It is estimated that these annual tax receipts total \$74,000.

For further information regarding Washington Executive/Hyde Field please contact:

Mike S. Gartland
c/o Freedom Air, Inc.
PO Box 10305
Piscataway Road
Clinton, MD 20735
Phone: (301) 297-7556
Fax: (301) 297-7069

For further information regarding this study please contact:

Maryland Aviation Administration
Office of Regional Aviation
P.O. Box 8766
BWI Airport, MD 21240 0766
Phone: (410) 859-7739
Fax: (410) 859-7757



Exhibit A-1
BASED AIRCRAFT by AIRPORT - 1995
Maryland Airports Economic Impact Study

AIRPORT	AIRPLANES				OTHER AIRCRAFT				TOTAL	AIRCRAFT
	Single	Multi	Jet	Total	Helic	Gliders	Military	Ultra	Total	
Commercial										
Baltimore/Washington Int'l	61	23	7	91	5	0	0	0	5	96
Grtr. Cumberland Reg. Aprt	36	6	1	43	1	9	0	0	10	53
Salisbury-Wicomico Co. Reg.	73	64	1	138	1	0	0	0	1	139
Washington Co. Reg. Airport	142	35	13	190	1	0	0	2	3	193
Total Commercial	312	128	22	462	8	9	0	2	19	481
General Aviation										
Baltimore Airpark	20	1	0	21	0	0	0	0	0	21
Bay Bridge Airport	50	8	0	58	0	0	0	0	0	58
Bennett Airport	8	0	0	8	0	0	0	2	2	10
Cambridge-Dorchester Co.	26	1	0	27	0	0	0	0	0	27
Carroll County Reg.	112	6	0	118	1	0	0	0	1	119
Cecil County Airpark	17	0	0	17	0	0	0	0	0	17
Clearview Airpark	29	2	0	31	0	0	0	0	0	31
College Park Airport	77	2	0	79	0	0	0	0	0	79
Crisfield-Somerset Airport	5	0	0	5	0	0	0	0	0	5
Davis Airport	45	0	0	45	0	0	0	0	0	45
Easton Muni. Airport	110	16	14	140	0	0	0	0	0	140
Essex Skypark	40	0	0	40	0	0	0	2	2	42
Fallston Airport	42	0	0	42	0	0	0	0	0	42
Frederick Muni. Airport	184	40	5	229	17	20	0	0	37	266
Freeway Airport	97	3	0	100	0	0	0	2	2	102
Garrett County Airport	12	5	0	17	1	0	0	0	1	18
Harford County Airport	41	2	0	43	0	4	0	0	4	47
Haysfield	50	0	0	50	0	0	0	0	0	50
Kentmorr Airpark	17	1	0	18	0	0	0	0	0	18
Lee Airport	100	30	0	130	1	0	0	0	1	131
Martin State Airport	206	23	13	242	29	0	31	0	60	302
Maryland Airport	67	8	0	75	0	0	0	0	0	75
Mexico Farms Airport	21	0	0	21	0	0	0	4	4	25
Montgomery County Airpark	200	35	2	237	4	0	0	0	4	241
Ocean City Muni. Airport	23	4	0	27	0	0	0	1	1	28
Potomac Airpark	98	5	0	103	0	0	0	4	4	107
Raintree Airpark	18	0	0	18	0	1	0	7	8	26
Ridgely Airpark	12	2	0	14	0	1	0	0	1	15
Saint Mary's County Airport	76	5	0	81	1	0	0	0	1	82
Suburban Airport	65	0	0	65	0	0	0	0	0	65
Washington Ex./ Hyde Field	110	6	0	116	13	0	0	1	14	130
Total Gen. Aviation	1,978	205	34	2,217	67	26	31	23	147	2,364
Total Aircraft	2,290	333	56	2,679	75	35	31	25	166	2,845

SOURCE: Wilbur Smith Associates, the Maryland Aviation Administration, the Federal Aviation Administration and individual airport managers.

Exhibit A-2
BASED AIRCRAFT by AIRPORT-1989
Maryland Airports Economic Impact Study

AIRPORT	AIRPLANES				OTHER AIRCRAFT				TOTAL	
	Single	Multi	Jet	Total	Helic	Gliders	Military	Ultra	Total	AIRCRAFT
Commercial										
Baltimore/Washington Int'l	95	6	8	109	0	0	0	0	0	109
Grtr. Cumberland Reg. Aprt	49	13	1	63	1	3	0	0	4	67
Salisbury-Wicomico Co. Reg.	74	7	28	109	1	0	0	0	1	110
Washington Co. Reg. Airport	<u>116</u>	<u>37</u>	<u>6</u>	<u>159</u>	<u>17</u>	<u>0</u>	<u>0</u>	<u>2</u>	<u>19</u>	<u>178</u>
Total Commercial	334	63	43	440	19	3	0	2	24	464
General Aviation										
Baltimore Airpark	48	0	0	48	1	0	0	0	1	49
Bay Bridge Airport	46	7	0	53	0	0	0	0	0	53
Bennett Airport	8	0	0	8	0	0	0	2	2	10
Cambridge-Dorchester Co.	33	3	0	36	0	0	0	0	0	36
Carroll County Reg.	84	10	0	94	0	0	0	0	0	94
Cecil County Airpark	31	0	0	31	0	0	0	0	0	31
Clearview Airpark	40	0	0	40	0	0	0	0	0	40
College Park Airport	85	4	0	89	0	0	0	0	0	89
Crisfield-Somerset Airport	14	0	0	14	0	0	0	0	0	14
Davis Airport	50	0	0	50	0	0	0	0	0	50
Easton Muni. Airport	100	15	1	116	0	0	0	0	0	116
Essex Skypark	25	0	0	25	0	0	0	2	2	27
Fallston Airport	43	0	0	43	0	0	0	0	0	43
Frederick Muni. Airport	180	17	0	197	6	5	0	0	11	208
Freeway Airport	125	4	0	129	1	0	0	0	1	130
Garrett County Airport	17	2	0	19	1	0	0	0	1	20
Harford County Airport	65	2	0	67	1	5	0	0	6	73
Haysfield	50	0	0	50	0	0	0	0	0	50
Kentmorr Airpark	12	1	0	13	0	0	0	0	0	13
Lee Airport	136	3	0	139	1	0	0	0	1	140
Martin State Airport	195	42	17	254	30	0	30	0	60	314
Maryland Airport	93	4	0	97	0	0	0	0	0	97
Mexico Farms Airport	20	0	0	20	0	0	0	4	4	24
Montgomery County Airpark	300	17	3	320	6	0	0	0	6	326
Ocean City Muni. Airport	22	8	0	30	1	0	0	0	1	31
Potomac Airpark	59	3	0	62	0	0	0	4	4	66
Raintree Airpark	8	0	0	8	0	0	0	0	0	8
Ridgely Airpark	14	0	0	14	0	3	0	7	10	24
Saint Mary's County Airport	80	9	0	89	0	0	0	3	3	92
Suburban Airport	64	1	0	65	0	0	0	0	0	65
Washington Ex./ Hyde Field	<u>151</u>	<u>9</u>	<u>0</u>	<u>160</u>	<u>5</u>	<u>0</u>	<u>0</u>	<u>1</u>	<u>6</u>	<u>166</u>
Total Gen. Aviation	2,198	161	21	2,380	53	13	30	23	119	2,499
Total Aircraft	2,532	224	64	2,820	72	16	30	25	143	2,963

SOURCE: Wilbur Smith Associates, the Maryland Aviation Administration, the Federal Aviation Administration and individual airport managers.

Exhibit A-3
AIRCRAFT OPERATIONS by AIRPORT - 1995
Maryland Airports Economic Impact Study

AIRPORT	GENERAL AVIATION			OTHER				TOTAL	
	Local	Itinerant	Subtotal	Carrier	Comm.	Air Taxi	Military	Subtotal	OPERS.
Commercial									
Baltimore/Washington Int'l	17,634	31,727	49,361	154,212	71,800	3,496	2,834	232,342	281,703
Grtr. Cumberland Reg. Aprt	10,500	1,980	12,480	0	9,702	200	200	10,102	22,582
Salisbury-Wicomico Co. Reg.	24,000	47,500	71,500	0	10,220	0	18,000	28,220	99,720
Washington Co. Reg. Arpt	19,995	33,974	53,969	1,428	4,462	496	1,284	7,670	61,639
Total Commercial	72,129	115,181	187,310	155,640	96,184	4,192	22,318	278,334	465,644
General Aviation									
Baltimore Airpark	2,000	1,000	3,000	0	0	0	20	20	3,020
Bay Bridge Airport	5,500	9,400	14,900	0	0	100	0	100	15,000
Bennett Airport	600	0	600	0	0	0	0	0	600
Cambridge-Dorchester Co.	6,327	2,393	8,720	0	0	0	201	201	8,921
Carroll County Reg.	105,000	20,000	125,000	0	0	200	150	350	125,350
Cecil County Airpark	2,750	1,250	4,000	0	0	0	70	70	4,070
Clearview Airpark	11,440	1,495	12,935	0	0	0	0	0	12,935
College Park Airport	9,000	3,000	12,000	0	0	10	0	10	12,010
Crisfield-Somerset Airport	150	650	800	0	0	0	50	50	850
Davis Airport	15,000	175	15,175	0	0	0	0	0	15,175
Easton Muni. Airport	15,000	60,000	75,000	0	0	10,000	5,000	15,000	90,000
Essex Skypark	3,000	500	3,500	0	0	0	0	0	3,500
Fallston Airport	2,190	1,460	3,650	0	0	0	100	100	3,750
Frederick Muni. Airport	148,038	37,009	185,047	0	0	2,879	1,226	4,105	189,152
Freeway Airport	24,000	4,300	28,300	0	0	80	300	380	28,680
Garrett County Airport	1,000	900	1,900	0	0	450	150	600	2,500
Harford County Airport	15,600	2,500	18,100	0	0	0	175	175	18,275
Haysfield	4,800	0	4,800	0	0	0	0	0	4,800
Kentmorr Airpark	1,230	5,150	6,380	0	0	0	20	20	6,400
Lee Airport	10,000	6,000	16,000	0	0	150	50	200	16,200
Martin State Airport	48,214	66,302	114,516	0	0	117	9,736	9,853	124,369
Maryland Airport	15,000	10,000	25,000	0	0	200	200	400	25,400
Mexico Farms Airport	3,900	800	4,700	0	0	0	0	0	4,700
Montgomery County Airpark	61,500	38,100	99,600	0	0	10,700	5	10,705	110,305
Ocean City Muni. Airport	6,000	700	6,700	0	0	0	36	36	6,736
Potomac Airpark	45,000	500	45,500	0	0	0	100	100	45,600
Raintree Airpark	5,304	1,081	6,385	0	0	0	77	77	6,462
Ridgely Airpark	7,286	9,500	16,786	0	0	540	50	590	17,376
Saint Mary's County Airport	38,316	15,963	54,279	0	0	2,122	50	2,172	56,451
Suburban Airport	20,000	400	20,400	0	0	10	0	10	20,410
Washington Ex./ Hyde Field	91,000	700	91,700	0	0	300	200	500	92,200
Total Gen. Aviation	724,145	301,228	1,025,373	0	0	27,858	17,966	45,824	1,071,197
Total Commercial & GA	796,274	416,409	1,212,683	155,640	96,184	32,050	40,284	324,158	1,536,841

SOURCE: Wilbur Smith Associates, the Maryland Aviation Administration, the Federal Aviation Administration and individual airport managers.

Exhibit A-4
AIRCRAFT OPERATIONS by AIRPORT - 1989
Maryland Airports Economic Impact Study

AIRPORT	GENERAL AVIATION			OTHER				TOTAL OPERATIO	
	Local	Itinerant	Subtotal	Carrier	Comm.	Air Taxi	Military		
Commercial									
Baltimore/Washington Int'l	4,177	68,806	72,983	147,642	76,000	1,778	2,406	227,826	300,809
Grtr. Cumberland Reg. Aprt	18,240	5,850	24,090	0	1,760	150	200	2,110	26,200
Salisbury-Wicomico Co. Reg.	17,600	42,400	60,000	0	17,000	0	15,200	32,200	92,200
Washington Co. Reg. Arpt	35,925	39,215	75,140	0	12,000	400	7,000	19,400	94,540
Total Commercial	75,942	156,271	232,213	147,642	106,760	2,328	24,806	281,536	513,749
General Aviation									
Baltimore Airpark	15,600	1,560	17,160	0	0	0	0	0	17,160
Bay Bridge Airport	1,700	12,000	13,700	0	0	84	0	84	13,784
Bennett Airport	2,250	1,250	3,500	0	0	0	0	0	3,500
Cambridge-Dorchester Co.	7,680	5,760	13,440	0	0	0	0	0	13,440
Carroll County Reg.	70,000	50,000	120,000	0	0	0	50	50	120,050
Cecil County Airpark	2,600	2,900	5,500	0	0	0	0	0	5,500
Clearview Airpark	5,200	7,800	13,000	0	0	0	0	0	13,000
College Park Airport	14,976	4,992	19,968	0	0	0	0	0	19,968
Crisfield-Somerset Airport	3,000	4,750	7,750	0	0	0	112	112	7,862
Davis Airport	5,200	5,200	10,400	0	0	0	0	0	10,400
Easton Muni. Airport	20,000	5,400	25,400	0	0	2,000	0	2,000	27,400
Essex Skypark	5,000	500	5,500	0	0	0	0	0	5,500
Fallston Airport	4,000	500	4,500	0	0	0	0	0	4,500
Frederick Muni. Airport	104,832	32,944	137,776	0	0	2,000	0	2,000	139,776
Freeway Airport	26,000	5,300	31,300	0	0	200	0	200	31,500
Garrett County Airport	4,000	6,200	10,200	0	0	400	0	400	10,600
Harford County Airport	27,300	7,500	34,800	0	0	0	100	100	34,900
Haysfield	4,400	100	4,500	0	0	0	0	0	4,500
Kentmorr Airpark	1,000	4,200	5,200	0	0	0	0	0	5,200
Lee Airport	10,000	4,000	14,000	0	0	0	0	0	14,000
Martin State Airport	69,307	91,116	160,423	0	0	124	17,462	17,586	178,009
Maryland Airport	20,000	10,000	30,000	0	0	0	0	0	30,000
Mexico Farms Airport	3,650	600	4,250	0	0	0	0	0	4,250
Montgomery County Airpark	104,000	51,500	155,500	0	0	8,500	0	8,500	164,000
Ocean City Muni. Airport	7,000	25,000	32,000	0	1,000	0	30	1,030	33,030
Potomac Airpark	14,560	6,240	20,800	0	0	0	0	0	20,800
Raintree Airpark	3,100	700	3,800	0	0	0	0	0	3,800
Ridgely Airpark	1,500	700	2,200	0	0	0	100	100	2,300
Saint Mary's County Airport	20,070	2,200	22,270	0	0	3,930	0	3,930	26,200
Suburban Airport	29,900	500	30,400	0	0	0	0	0	30,400
Washington Ex./ Hyde Field	39,500	2,600	42,100	0	0	12,500	0	12,500	54,600
Total Gen. Aviation	647,325	354,012	1,001,337	0	1,000	29,738	17,854	48,592	1,049,929
Total Commercial & GA	723,267	510,283	1,233,550	147,642	107,760	32,066	42,660	330,128	1,563,678

SOURCE: Wilbur Smith Associates, the Maryland Aviation Administration, the Federal Aviation Administration and individual airport managers.

Exhibit A-5
CHANGE in BASED AIRCRAFT, AIRCRAFT OPERATIONS and ENPLANED PASSENGERS - 1995 vs. 1989
Maryland Airports Economic Impact Study

AIRPORT	BASED AIRCRAFT/a		AIRCRAFT OPERATIONS								ENPLANED PASSENGERS	
	No.	Perc.	Commercial		Air Taxi		GA Itinerant		GA Local		No.	Perc.
	No.	Perc.	No.	Perc.	No.	Perc.	No.	Perc.	No.	Perc.	No.	Perc.
Commercial												
Baltimore/Washington Int'l	(13)	-12%	2,370	1%	1,718	97%	(37,079)	-54%	13,457	322%	1,593,907	32.0%
Grtr. Cumberland Reg. Apt.	(20)	-31%	7,942	451%	50	33%	(3,870)	-66%	(7,740)	-42%	6,308	186.0%
Salisbury-Wicomico Co. Reg.	29	26%	(6,780)	-40%	na	na	5,100	12%	6,400	36%	(6,463)	-9.2%
Washington Co. Reg. Airport	15	9%	(6,110)	-51%	96	24%	(5,241)	-13%	(15,930)	-44%	1,446	4.5%
Total Commercial	11	2%	(2,578)	-1%	1,864	80%	(41,090)	-26%	39,239	52%	1,595,198	31.3%
General Aviation												
Baltimore Airpark	(28)	-57%	na	na	na	na	(560)	-36%	(13,600)	-87%	na	na
Bay Bridge Airport	5	9%	na	na	16	19%	(2,600)	-22%	3,800	224%	na	na
Bennett Airport	0	0%	na	na	na	na	(1,250)	-100%	(1,650)	-73%	na	na
Cambridge-Dorchester Co.	(9)	-25%	na	na	na	na	(3,367)	-58%	(1,353)	-18%	na	na
Carroll County Reg.	25	27%	na	na	200	na	(30,000)	-60%	35,000	50%	na	na
Cecil County Airpark	(14)	-45%	na	na	na	na	(1,650)	-57%	150	6%	na	na
Clearview Airpark	(9)	-23%	na	na	na	na	(6,305)	-81%	6,240	120%	na	na
College Park Airport	(10)	-11%	na	na	10	na	(1,992)	-40%	(5,976)	-40%	na	na
Crisfield-Somerset Airport	(9)	-64%	na	na	na	na	(4,100)	-86%	(2,850)	-95%	na	na
Davis Airport	(5)	-10%	na	na	na	na	(5,025)	-97%	9,800	188%	na	na
Easton Muni. Airport	24	21%	na	na	8,000	400%	54,600	1011%	(5,000)	-25%	na	na
Essex Skypark	15	60%	na	na	na	na	0	0%	(2,000)	-40%	na	na
Fallston Airport	(1)	-2%	na	na	na	na	960	192%	(1,810)	-45%	na	na
Frederick Muni. Airport	43	21%	na	na	879	44%	4,065	12%	43,206	41%	na	na
Freeway Airport	(30)	-23%	na	na	(120)	-60%	(1,000)	-19%	(2,000)	-8%	na	na
Garrett County Airport	(2)	-10%	na	na	50	13%	(5,300)	-85%	(3,000)	-75%	na	na
Harford County Airport	(25)	-37%	na	na	na	na	(5,000)	-67%	(11,700)	-43%	na	na
Haysfield	0	0%	na	na	na	na	(100)	-100%	400	9%	na	na
Kentmorr Airpark	5	38%	na	na	na	na	950	23%	230	23%	na	na
Lee Airport	(9)	-6%	na	na	150	na	2,000	50%	0	0%	na	na
Martin State Airport	(13)	-5%	na	na	(7)	-6%	(24,814)	-27%	(21,093)	-30%	na	na
Maryland Airport	(22)	-23%	na	na	200	na	0	0%	(5,000)	-25%	na	na
Mexico Farms Airport	1	5%	na	na	na	na	200	33%	250	7%	na	na
Montgomery County Airpark	(85)	-26%	na	na	2,200	26%	(13,400)	-26%	(42,500)	-41%	na	na
Ocean City Muni. Airport	(4)	-13%	(1,000)	-100%	na	na	(24,300)	-97%	(1,000)	-14%	(2,590)	-100%
Potomac Airpark	41	66%	na	na	na	na	(5,740)	-92%	30,440	209%	na	na
Raintree Airpark	10	125%	na	na	na	na	381	54%	2,204	71%	na	na
Ridgely Airpark	0	0%	na	na	na	na	8,800	1257%	5,786	386%	na	na
Saint Mary's County Airport	(7)	-8%	na	na	(1,808)	-46%	13,763	626%	18,246	91%	na	na
Suburban Airport	0	0%	na	na	10	na	(100)	-20%	(9,900)	-33%	na	na
Washington Ex./ Hyde Field	(36)	-22%	na	na	(12,200)	-98%	(1,900)	-73%	51,500	130%	na	na
Total Gen. Aviation	(149)	-6%	(1,000)	na	(2,420)	-8%	(52,784)	-15%	76,820	12%	(2,590)	-100%
Total Comm. & GA	(138)	-5%	(3,578)	-1%	(556)	-2%	(93,874)	-18%	116,059	16%	1,592,608	31%

SOURCE: Wilbur Smith Associates, the Maryland Aviation Administration, the Federal Aviation Administration and individual airport managers.

"na" indicates: No based aircraft, operations or enplaned passengers.

/a Includes all civilian airplanes and helicopters, but excludes gliders, ultra-lights and military aircraft.



Maryland Aviation Administration

"Striving to do our best in everything we do - dedicated to providing outstanding airport facilities and services"

Theodore E. Mathison Executive Director

DATE: May 31, 1996

TO: All Airlines, Airport Tenants and Others
Serving or Using Baltimore/Washington International Airport

The Maryland Aviation Administration has engaged Wilbur Smith and Associates as subcontractors to Greiner, Inc. to conduct an Airport Economic Impact Study for the State of Maryland. This study will update the previous economic impact assessment conducted in 1990.

The purpose of this study is to obtain information on the economic importance of BWI Airport to the local communities and State. Therefore, we are requesting your assistance in completing this survey.

The information reported on your questionnaire will be kept confidential. The data you provide will be used only in aggregate form, combined with data from other companies. The sources of all information will remain anonymous. A summary report of the completed study will be distributed to all BWI tenants later this year.

You may FAX your completed questionnaire to the phone number indicated on the questionnaire or mail it in the enclosed, prepaid envelope.

We appreciate your cooperation in providing information for this important study. The results will be helpful to our efforts to continue improving aviation facilities in Maryland.

If you have any questions about this survey, please contact Mr. Eric B. McClellan, of Wilbur Smith Associates, at 703-698-9780.

Sincerely,

Lynn S. Bezilla, Director
Division of Planning

LSB:jar

Enclosures

MARTIN STATE AIRPORT
701 Wilson Point Road - Box 1
Baltimore, Maryland 21220-4282

Telephone: (410) 682-8800 • TDD for the Hearing Impaired: (410) 859-7227 • FAX: (410) 682-8822



DATA REQUEST FOR MARYLAND AIRPORTS

Maryland Statewide Airport Economic Impact Study

1996

This data request is made by the Maryland Aviation Administration. The results will be used to update the economic impact roles found in the previous 1990 study of the State's airports. The consulting firm of Wilbur Smith Associates in conjunction with Daniel Consultants, Inc. will conduct the analysis. Representatives of the consultant team may contact you in the near future. We request that you please complete this survey as soon as possible and return it to the Consultant in the enclosed envelope (or fax it). The rapid and thorough completion of this survey will ensure the proper calculation of your airport's economic impacts.

1. AIRPORT: _____
2. AIRPORT CONTACTS: This data request was completed by:
 Name: _____ Phone: () _____
3. AIRPORT USE: The following number of aircraft and aircraft operations for your airport are as stated on the State's 5010 forms or from our files. In your opinion are these statistics accurate, or should they be revised? (Please provide revised data where appropriate).

Current Based Aircraft -1995

Annual Aircraft Operations - 1995

	<u>Number</u>	<u>Revised</u>		<u>Number</u>	<u>Revised</u>
Single Engine	_____	_____	Air Carrier	_____	_____
Multi-Engine	_____	_____	Commuter	_____	_____
Jet	_____	_____	Air-Taxi	_____	_____
Helicopters	_____	_____	General Aviation:		
Gliders	_____	_____	Local	_____	_____
Military	_____	_____	Itinerant	_____	_____
Ultra-Light	_____	_____	Military	_____	_____
Total Aircraft	_____	_____	Total Operations	_____	_____

4. AIRPORT DEVELOPMENT: Please identify any significant recent changes in the airport's role or activity. For instance, has there been a significant rise or fall in the number of based aircraft or aircraft operations? Has a runway been extended? Has a new FBO or aircraft repair operation located at the airport? Or, has an off-airport firm located in the area primarily because of the airport, or has an existing firm begun making heavy use of the airport?

5. JOBS AT THE AIRPORT: Please estimate the number of full-time and part-time aviation-related jobs that currently exist at the airport.

<u>CURRENT JOBS</u>			<u>CURRENT JOBS</u>		
	<u>Full Time</u>	<u>Part Time</u>		<u>Full Time</u>	<u>Part Time</u>
Airport Operations:			General Aviation:		
Airport Operator	_____	_____	FBO(s)	_____	_____
FAA	_____	_____	Restaurants	_____	_____
Other	_____	_____	Paid Corp. Pilots	_____	_____
Subtotal	_____	_____	Other Gen. Aviation	_____	_____
			Subtotal	_____	_____
Commercial Aviation-Oriented:			Ground Transport:		
Airlines	_____	_____	Car Rental	_____	_____
Air Cargo	_____	_____	Limos/Buses	_____	_____
Baggage & Ramp	_____	_____	Taxis	_____	_____
Restaurant	_____	_____	Other	_____	_____
Gift Shop	_____	_____	Subtotal	_____	_____
Parking	_____	_____			
Other	_____	_____	Total Airport Employ.	_____	_____
Subtotal	_____	_____			

On the enclosed page please list airport tenant firms, contacts and estimated jobs.

6. AIRPORT OWNER/OPERATOR ECONOMIC IMPACT: Please estimate your operation expenses and revenues or provide a copy of your airport's most recent annual budget. This detailed information will be treated as strictly confidential, and will only be presented in a combined format with other firms at your airport.

<u>Operating Expenses</u>		<u>Operating Revenues</u>	
Salaries and Wages	_____	Aviation Revenue:	_____
Maintenance	_____	Landing Fees	_____
Buildings	_____	Leases & Rentals	_____
Insurance	_____	Fuel Fees	_____
Depreciation	_____	Other Revenue:	_____
Interest Expense	_____	Parking	_____
Utilities	_____	Other	_____
Other Expenses	_____	Total Annual Revenues	_____
Total Annual Expenses	_____		

Thank you for your assistance. The results of this study will be provided to your airport and will prove valuable to the airport and to the aviation industry in general. When you have completed this form, please mail it in the enclosed envelop or fax it to the number shown below.

Mr. Eric B. McClellan
 Wilbur Smith Associates
 2921 Telestar Ct.
 Falls Church, VA 22042-1297
 FAX (703) 280-1631

If you have any questions or concerns regarding this data request or the impact analysis, please call the Consultant at: (703) 698-9780

SUBTENANT LISTING, if applicable

Contact

Phone Number

Estimated Employees

[illegible]

AIRLINE ECONOMIC IMPACT SURVEY
Baltimore/Washington International (BWI)

Each airline serving BWI is requested to answer the following questions. Your responses are **CONFIDENTIAL** and will only be used in aggregate form combined with data from other companies. Your responses will not be disclosed as attributable in any way to your specific firm. The responses should apply to your airline as it exists or relates to BWI.

1. Airline Tenant: _____
Contact person: _____
Telephone: () _____

2. How many people are employed by your airline in the Baltimore metropolitan area whose job is attributable to your BWI Airport operation:
- _____ Ground personnel at BWI (ticket agents, ground crew, baggage handlers, maintenance, supervisory, administrative)
_____ Airplane crew based at BWI (pilots, engineers, flight attendants)
_____ Personnel who work near BWI
_____ Other employees of your airline located in the Baltimore area, but not located at BWI (local ticketing, etc)
_____ TOTAL BWI-related airline employees that work in the Baltimore metropolitan area.

3. Estimate the number of annual hotel room nights generated by your non-BWI based flight crews in layovers in the Baltimore area (ie. one flight attendant spending one layover night in the Baltimore area equals one person night).
- Person nights per year in the Baltimore area: _____

4. Estimate the annual 1995 expenditures made by your airline in the Baltimore area:

Annual Payroll	\$ _____	
Fuel Costs	\$ _____	or gallons _____
Capital Investment (at BWI)	\$ _____	
Airport Fees and Rent	\$ _____	
Operation & Other Costs	\$ _____	(% paid to other firms at BWI _____%)
TOTAL BWI-AREA EXPENSES	\$ _____	

5. Estimate the percent of your airline's expenses (Question #4) that are due to:

Passenger Transport	_____
Belly Cargo Transport	_____
TOTAL	100%

6. Do you sublease any property, gates or ticket counters at the airport to other firms?

_____ No
_____ Yes, if so please list the firms and their contacts on the back of this form.



Thank you for your assistance. The results of this analysis should prove useful to your aviation industry and to BWI. Please return this form to:

If you have any questions or concerns regarding the survey, please contact:

Mr. Eric B. McClellan
Wilbur Smith Associates
2921 Telstar Court
Falls Church, VA 22042-1297
(703) 698-9780
Fax (703) 280-1631

SUBTENANT LISTING, if applicable

Estimated Employees

[illegible]

AVIATION SUPPORT ECONOMIC IMPACT SURVEY
Baltimore/Washington International (BWI)

Each firm that supports aviation services at BWI is requested to answer the following questions. Your responses are **CONFIDENTIAL** and will only be used in aggregate form combined with data from other companies. Your responses will not be disclosed as attributable in any way to your specific firm. The responses should apply to your firm as it exists or relates to BWI.

1. Firm Name: _____
Contact Person: _____
Telephone: () _____

2. What percent of your firm's operations and employment that relate to BWI are:

_____ %	Located at BWI
_____ %	Located near BWI
_____ %	Located at another location (in the Baltimore area, but not at or near BWI)
100%	

3. How many people are employed by your firm that:

a. Work at BWI Airport:

Full-Time Employees	_____
Part-Time Employees	_____
TOTAL At-Airport Employees	_____

b. Work elsewhere in the Baltimore area, but whose job depends on the BWI Airport:

Full-Time Employees	_____
Part-Time Employees	_____
TOTAL Off-Airport Employees	_____

4. Estimate the annual 1995 impacts made by your firm in the Baltimore area:

a. Annual firm gross revenues/sales due to the BWI Airport: \$ _____

b. Annual firm expenditures due to the BWI Airport:

Annual Payroll	\$ _____	
Capital Investment (at BWI)	\$ _____	
Airport Fees and Rent	\$ _____	
Operation & Other Costs	\$ _____	(Percent paid to other firms at BWI _____ %)
TOTAL BWI-AREA EXPENSES	\$ _____	

5. Do you sublease any property at the airport to other firms?

_____ No

_____ Yes, if so please list the firms and their contacts on the back of this form.



Thank you for your assistance. The results of this analysis should prove useful to your aviation industry and to BWI. Please return this form to:

If you have any questions or concerns regarding the survey, please contact:

Mr. Eric B. McClellan
Wilbur Smith Associates
2921 Telstar Court
Falls Church, VA 22042-1297
(703) 698-9780
Fax (703) 280-1631

SUBTENANT LISTING, if applicable

Estimated Employees

AIRPORT TENANT ECONOMIC IMPACT SURVEY
Baltimore/Washington International (BWI)

Each airport tenant at BWI is requested to answer the following questions. Your responses are **CONFIDENTIAL** and will only be used in aggregate form combined with data from other companies. Your responses will not be disclosed as attributable in any way to your specific firm. The responses should apply to your firm as it exists or relates to BWI.

1. Firm Name: _____
Function: _____
Aviation Related? ____ Yes ____ No ____ Partial (what %) _____
Contact person: _____
Telephone () _____

2. What percent of your firm's operations and employment that relate to BWI are:
____ % Located at BWI
____ % Located near BWI
____ % Located at another location (in the Baltimore area, but not at or near BWI)
100%

3. How many people are employed by your firm that:
a. Work at BWI Airport:
Full-Time Employees _____
Part-Time Employees _____
TOTAL On-Airport Employees _____
b. Work elsewhere in the Baltimore area, but whose job depends on the BWI Airport:
Full-Time Employees _____
Part-Time Employees _____
TOTAL Off-Airport Employees _____

4. Estimate the annual 1995 impacts made by your firm in the Baltimore area:
a. Annual firm gross revenues/sales due to the BWI Airport: \$ _____
b. Annual firm expenditures due to the BWI Airport:
Annual Payroll \$ _____
Capital Investment (at BWI) \$ _____
Airport Fees and Rent \$ _____
Operation & Other Costs \$ _____ (Percent paid to other firms at BWI ____ %)
TOTAL BWI-AREA EXPENSES \$ _____

5. Do you sublease any property at the airport to other firms that provide aviation service?
____ No
____ Yes, if so please list the firms and their contacts on the back of this form.



Thank you for your assistance. The results of this analysis should prove useful to your aviation industry and to BWI. Please return this form to:

If you have any questions or concerns regarding the survey, please contact:

Mr. Eric B. McClellan
Wilbur Smith Associates
2921 Telstar Court
Falls Church, VA 22042-1297
(703) 698-9780
Fax (703) 280-1631

SUBTENANT LISTING, if applicable

Estimated Employees

[illegible]

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2344-2345
2345-2346
2346-2347
2347-2348
2348-2349
2349-2350
2350-2351
2351-2352
2352-2353
23



AIRPORT GOVERNMENT AGENCY ECONOMIC IMPACT SURVEY
Baltimore/Washington International (BWI)

Each government agency at BWI is requested to answer the following questions. Your responses are **CONFIDENTIAL** and will only be used in aggregate form combined with data from other companies. Your responses will not be disclosed as attributable in any way to your specific firm. The responses should apply to your firm as it exists or relates to BWI.

1. Agency Name: _____
Function: _____
Aviation Related? _____ Yes _____ No _____ Partial (what %) _____
Contact person: _____
Telephone () _____

2. What percent of your firm's operations and employment that relate to BWI are:
_____ % Located at BWI
_____ % Located near BWI
_____ % Located at another location (in the Baltimore area, but not at or near BWI)
100%

3. How many people are employed by your firm that:
a. Work at BWI Airport:
Full-Time Employees _____
Part-Time Employees _____
TOTAL On-Airport Employees _____
b. Work elsewhere in the Baltimore area, but whose job depends on the BWI Airport:
Full-Time Employees _____
Part-Time Employees _____
TOTAL Off-Airport Employees _____

4. Estimate the annual 1995 impacts made by your firm in the Baltimore area:
a. Annual gross revenues due to the BWI Airport (if applicable): \$ _____
b. Annual expenditures due to the BWI Airport:
Annual Payroll \$ _____
Capital Investment (at BWI) \$ _____
Airport Fees and Rent \$ _____
Operation & Other Costs \$ _____
TOTAL BWI-AREA EXPENSES \$ _____



Thank you for your assistance. The results of this analysis should prove useful to your aviation industry and to BWI. Please return this form to:

If you have any questions or concerns regarding the survey, please contact:

Mr. Eric B. McClellan
Wilbur Smith Associates
2921 Telstar Court
Falls Church, VA 22042-1297
(703) 698-9780
Fax (703) 280-1631

AIRPORT CAR RENTAL ECONOMIC IMPACT SURVEY
Baltimore/Washington International (BWI)

Each car rental firm at BWI is requested to answer the following questions. Your responses are **CONFIDENTIAL** and will only be used in aggregate form combined with data from other companies. Your responses will not be disclosed as attributable in any way to your specific firm. The responses should apply to your firm as it exists or relates to BWI.

1. Firm Name: _____
Contact person: _____
Telephone () _____

2. What percent of your firm's operations and employment that relate to BWI are:
_____ % Located at BWI
_____ % Located near BWI
_____ % Located at another location (in the Baltimore area, but not at or near BWI)
100%

3. How many people are employed by your firm that:
a. Work at BWI Airport:
Full-Time Employees _____
Part-Time Employees _____
TOTAL On-Airport Employees _____
b. Work near BWI Airport:
Full-Time Employees _____
Part-Time Employees _____
TOTAL Near-Airport Employees _____
c. Work elsewhere in the Baltimore area whose job depends on the BWI Airport:
Full-Time Employees _____
Part-Time Employees _____
TOTAL Off-Airport Employees _____

4. Estimate the annual 1995 impacts made by your firm in the Baltimore area:
a. Annual firm gross revenues/sales due to the BWI Airport: \$ _____
b. Annual firm expenditures due to the BWI Airport:
Annual Payroll \$ _____
Capital Investment (at BWI) \$ _____
Airport Fees and Rent \$ _____
Operation & Other Costs \$ _____
TOTAL BWI-AREA EXPENSES \$ _____



Thank you for your assistance. The results of this analysis should prove useful to your aviation industry and to BWI. Please return this form to:

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Wilbur Smith Associates
2921 Telstar Court
Falls Church, VA 22042-1297
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Fax (703) 280-1631

AIRPORT GROUND TRANSPORT ECONOMIC IMPACT SURVEY
Baltimore/Washington International (BWI)

Each ground transport firm at BWI is requested to answer the following questions. Your responses are **CONFIDENTIAL** and will only be used in aggregate form combined with data from other companies. Your responses will not be disclosed as attributable in any way to your specific firm. The responses should apply to your firm as it exists or relates to BWI.

1. Firm Name: _____
Contact person: _____
Telephone () _____

2. What percent of your firm's operations and employment that relate to BWI are:
_____ % Located at BWI
_____ % Located near BWI
_____ % Located at another location (in the Baltimore area, but not at or near BWI)
100%

3. How many people are employed by your firm that:
a. Work at BWI Airport:
Full-Time Employees _____
Part-Time Employees _____
TOTAL On-Airport Employees _____

b. Work elsewhere in Baltimore area, but whose job depends on the BWI:
Full-Time Employees _____
Part-Time Employees _____
TOTAL Off-Airport Employees _____

4. Estimate the annual 1995 impacts made by your firm in the Baltimore area:
a. Annual firm gross revenues/sales due to the BWI Airport: \$ _____
b. Annual firm expenditures due to the BWI Airport:
Annual Payroll \$ _____
Capital Investment (at BWI) \$ _____
Airport Fees and Rent \$ _____
Operation & Other Costs \$ _____ (Percent paid to other firms at BWI ____%)
TOTAL BWI-AREA EXPENSES \$ _____



Thank you for your assistance. The results of this analysis should prove useful to your aviation industry and to BWI. Please return this form to:

If you have any questions or concerns regarding the survey, please contact:

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Wilbur Smith Associates
2921 Telstar Court
Falls Church, VA 22042-1297
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Fax (703) 280-1631