The Columbus Regional Airport Authority’s (CRAA) system of three airports serves a vital role in the state and regional economies by generating jobs and contributing to overall economic development. In addition, CRAA’s airports serve as gateways to the nation’s air transportation system, connecting Central Ohio to the global economy.

Based on 2017 data, this study focuses on the annual economic impacts created by the businesses and tenants of CRAA’s three airports—John Glenn Columbus International (CMH), Rickenbacker International (LCK), and Bolton Field (TZR)—in addition to Foreign-Trade Zone 138, which is based at Rickenbacker and administered by CRAA. The research also included:

- Visitors who travel through CMH, LCK and TZR
- In-state companies who rely on the airports to support and conduct their business
- CRAA’s development surrounding the airports
CRAA’s system of airports gives the Columbus Region and the state of Ohio a safe and efficient transportation mode, while fueling economic growth and development. In 2017, CRAA airports and Foreign-Trade Zone 138 supported 58,730 jobs and generated $12.9 billion in economic impact (business revenue) in Ohio while meeting the air travel needs of residents, businesses, and visitors.

- CRAA’s airports generated and sustained **58,730 jobs in Ohio** and **1 in 25 of total jobs in the Columbus Region**.
- Workers supported by CRAA’s airports earned **$3.1 billion in payroll in Ohio** each year.
- An annual contribution of **$12.9 billion to local and state economies** can be attributed to CRAA.
- Passengers at CMH and LCK totaled 7.8 million in 2017, the most in the 88-year history of Columbus air service.
- In 2017, more than 47,000 general aviation aircraft took off from and landed at CRAA airports.
- Each day, approximately 4,300 visitors arrived in the state at a CRAA airport on commercial airlines or general aviation aircraft.
- **Every 100 jobs** directly supported by CRAA results in an **additional 83 jobs** in the state.
How Economic Impact is Measured

Sources of impact:

- **Airports**: CMH, LCK, and TZR as job centers
- **Visitor Spending**: Supporting tourism
- **Foreign-Trade Zone 138**: Businesses that ship/receive goods
- **Other Airport/CRAA Related Companies**: Clustered off-airport

How data were collected:

- Surveys and outreach to businesses on and near the airport
- Business activity databases as needed
- Visitor spending surveys
- CRAA financials and staff

Measures used to describe economic impacts:

- **Jobs** represent the number of individuals employed, including both part- and full-time positions.
- **Payroll** covers total compensation for work, including gross wages, salaries, proprietor income, employer provided benefits and taxes paid to governments on behalf of employees.
- **Value Added** equals the difference between an industry’s gross business revenue and the cost of purchased goods and services. Value added for companies across industries and across the U.S. is a measure of Gross Domestic Product.
- **Business Revenue** is value added plus the cost of purchased goods and services. Business revenue can also be referred to as “output” or “economic output” by economists, or “economic impact.”
CRAA Airport System

- **John Glenn Columbus International Airport (CMH):**
  - Passenger-focused
  - More than 7.5 million passengers traveled through CMH in 2017
  - CMH is also home base for NetJets, the worldwide leader in fractional jet ownership and FlightSafety International, a world-class leader in professional aviation training and flight simulation systems
  - **Annual economic impact in Ohio- 33,360 jobs and $5.3 billion**

- **Rickenbacker International Airport (LCK):**
  - Cargo-dedicated
  - In 2017, more than 255 million pounds of cargo flew through LCK
  - LCK is home base for the Ohio National Guard’s 121st Air Refueling Wing
  - **Annual economic impact in Ohio- 15,280 jobs and $2.5 billion**

- **Bolton Field (TZR):**
  - General aviation reliever airport
  - In 2017, nearly 23,000 aircraft operations occurred at TZR
  - TZR is home to Columbus State Community College’s Aviation Maintenance Technology facility
  - **Annual economic impact in Ohio- 110 jobs and $11.8 million**

- **Foreign-Trade Zone 138:**
  - Administered by CRAA and based at Rickenbacker, FTZ 138 helps businesses inside the zone’s 25-county, Central Ohio service area lower costs and boost profits by deferring, reducing and eliminating customs duties
  - In 2017, nearly $9.26 billion of goods moved through FTZ 138
  - **Annual economic impact in Ohio- 9,980 jobs and $5.2 billion**
Economic Impact by CRAA System Component

As CRAA’s flagship commercial service airport, John Glenn Columbus International Airport (CMH) generates economic impacts by serving as a dynamic job center for people who work in a variety of air service and support industries and by facilitating the tourism economy by allowing easy access for outside visitors.

- Over 16,000 people are employed as a result of on-airport activity at CMH. This includes airlines and aviation support services, air cargo handling, services catering to travelers (such as concessions, ground transportation, and hotels), CRAA’s own operations and capital improvement program, and federal agencies such as the TSA, FAA, and U.S. Customs and Border Protection.

- Visitors who arrive at CMH support $1.67 billion in business revenue as a result of spending at off-airport hospitality businesses that serve air travelers.

- CMH supports over 1,300 jobs related to off-airport nearby business activity that takes advantage of proximity to the airport and its services.

- The total economic impact of CMH and its surroundings is 33,360 jobs and $5.3 billion in revenue for Ohio businesses.

Total Economic Impacts of CMH in Ohio (Including Direct and Multiplier Impacts)

<table>
<thead>
<tr>
<th>Impact Source</th>
<th>Jobs</th>
<th>Payroll</th>
<th>Value Added</th>
<th>Business Revenues</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-Airport Impacts</td>
<td>16,282</td>
<td>$1,113,530,000</td>
<td>$1,801,972,000</td>
<td>$3,255,926,000</td>
</tr>
<tr>
<td>Visitor Spending</td>
<td>15,747</td>
<td>$521,691,000</td>
<td>$915,699,000</td>
<td>$1,673,213,000</td>
</tr>
<tr>
<td>Off-Airport, Near CMH</td>
<td>1,331</td>
<td>$78,949,000</td>
<td>$146,986,000</td>
<td>$332,550,000</td>
</tr>
<tr>
<td>Total</td>
<td>33,361</td>
<td>$1,714,170,000</td>
<td>$2,864,657,000</td>
<td>$5,261,689,000</td>
</tr>
</tbody>
</table>

Source: EDR Group analysis. Dollars in constant 2017 dollars. Dollars rounded to the thousands. Columns may not add due to rounding. Totals include both direct and multiplier impacts associated with supplier purchases and spending of income earned by workers.
Rickenbacker International Airport (LCK), one of only a few cargo-dedicated airports in the world, has the capacity to support the world’s largest aircraft. Passenger air service also operates from Rickenbacker Passenger Terminal, offering additional connectivity for residents and businesses. LCK also anchors the surrounding Rickenbacker area which supports even more economic activity in the form of a successful logistics cluster and CRAA-owned or CRAA-developed properties. This includes the Rickenbacker Global Logistics Park (RGLP), a 1,777-acre master-planned area of prime industrial land located within five campuses surrounding the airport, and Norfolk Southern Rickenbacker Intermodal Terminal.

- On-airport activity at LCK supports 5,600 jobs in Ohio, paying workers $374 million. The two largest categories of on-airport employment at LCK are military personnel (active duty, civilian employees, and reservists) and jobs related to freight handling and distribution.

- While Rickenbacker International Airport is primarily oriented toward the handling of air cargo, it also supports visitor spending impacts by hosting both commercial and general aviation passenger air service. Visitor spending impacts of LCK generate $39.2 million in revenue for Ohio businesses.

- The Rickenbacker area includes the RGLP, Norfolk Southern Rickenbacker Intermodal Terminal, and businesses located near LCK that rely on the airport for their business operations. The Rickenbacker area supports over 9,200 jobs and $1.3 billion in business revenue. Businesses operating within the 25-county Foreign-Trade Zone 138 are excluded from this total since they are separately accounted for.

- The total economic impact of LCK and the Rickenbacker area is 15,280 jobs in the state of Ohio and $2.5 billion in economic activity.

**Total Economic Impacts of LCK in Ohio (Including Direct and Multiplier Impacts)**

<table>
<thead>
<tr>
<th>Impact Source</th>
<th>Jobs</th>
<th>Payroll</th>
<th>Value Added</th>
<th>Business Revenues</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-Airport Impacts</td>
<td>5,658</td>
<td>$374,415,000</td>
<td>$707,189,000</td>
<td>$1,127,689,000</td>
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<tr>
<td>Visitor Spending</td>
<td>370</td>
<td>$12,172,000</td>
<td>$21,366,000</td>
<td>$39,177,000</td>
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<tr>
<td>Rickenbacker Area</td>
<td>9,252</td>
<td>$493,760,000</td>
<td>$743,758,000</td>
<td>$1,319,658,000</td>
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<tr>
<td><strong>Total</strong></td>
<td><strong>15,280</strong></td>
<td><strong>$880,347,000</strong></td>
<td><strong>$1,472,313,000</strong></td>
<td><strong>$2,486,524,000</strong></td>
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</table>

Source: EDR Group analysis. Dollars in constant 2017 dollars. Dollars rounded to the thousands. Columns may not add due to rounding. Totals include both direct and multiplier impacts associated with supplier purchases and spending of income earned by workers.
Bolton Field Airport (TZR) is dedicated to general aviation activity and in 2017 served nearly 23,000 aircraft operations, about 23 percent of which provided easy access for visitors from outside the Columbus Region. In addition to the Fixed Base Operator, other major on-airport tenants include Columbus State Community College’s Aviation Maintenance Technology facility and JP’s Barbeque restaurant and catering facility.

- In its role as an employment center, TZR supported $8.7 million in business revenue for Ohio businesses.
- Visitor spending from general aviation travelers generated an additional $3.1 million in statewide business revenue.
- In 2017, TZR supported 110 jobs in the Ohio economy and $11.8 million in business revenue.

**Total Economic Impacts of TZR in Ohio (Including Direct and Multiplier Impacts)**

<table>
<thead>
<tr>
<th>Impact Source</th>
<th>Jobs</th>
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<th>Business Revenues</th>
</tr>
</thead>
<tbody>
<tr>
<td>On-Airport Impacts</td>
<td>79</td>
<td>$3,284,000</td>
<td>$4,760,000</td>
<td>$8,703,000</td>
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<tr>
<td>Visitor Spending</td>
<td>31</td>
<td>$974,000</td>
<td>$1,682,000</td>
<td>$3,079,000</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>110</td>
<td>$4,258,000</td>
<td>$6,442,000</td>
<td>$11,782,000</td>
</tr>
</tbody>
</table>

Source: EDR Group analysis. Dollars in constant 2017 dollars. Dollars rounded to the thousands. Columns may not add due to rounding. Totals include both direct and multiplier impacts associated with supplier purchases and spending of income earned by workers.
Foreign-Trade Zones (FTZs) are secure areas under U.S. Customs and Border Protection (CBP) supervision that are considered outside the U.S. stream of commerce for Customs duty collection purposes. There are currently over 200 FTZs in the country, including nine in Ohio. FTZs are important to international trade and the economies of many U.S. regions, including the Columbus, Ohio, region. They provide certain economic and logistical benefits to users by controlling how and when duties are paid on goods that enter and exit the FTZ, which in turn helps facilitate international trade.

CRAA is the grantee of FTZ 138, which is centered in Columbus at cargo-dedicated Rickenbacker International. One of the highest-performing FTZs in the country and the largest of nine FTZs in Ohio, FTZ 138 provides access to the program for businesses inside the zone’s 25-county service area.

- Eleven companies comprised FTZ 138 in 2017. These businesses accrue financial benefits afforded to U.S. FTZs in lowering costs associated with importing merchandise.
- Nearly $9.26 billion of goods moved through FTZ 138.
- The economic impact of FTZ 138 is 9,980 jobs in the state of Ohio and $5.2 billion in economic activity.

### Total Economic Impacts of FTZ 138 in Ohio (Including Direct and Multiplier Impacts)

<table>
<thead>
<tr>
<th>Impact Source</th>
<th>Jobs</th>
<th>Payroll</th>
<th>Value Added</th>
<th>Business Revenues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>9,977</td>
<td>$480,399,000</td>
<td>$732,600,000</td>
<td>$5,170,760,000</td>
</tr>
</tbody>
</table>

Source: EDR Group analysis. Dollars in constant 2017 dollars. Dollars rounded to the thousands. Totals include both direct and multiplier impacts associated with supplier purchases and spending of income earned by workers.