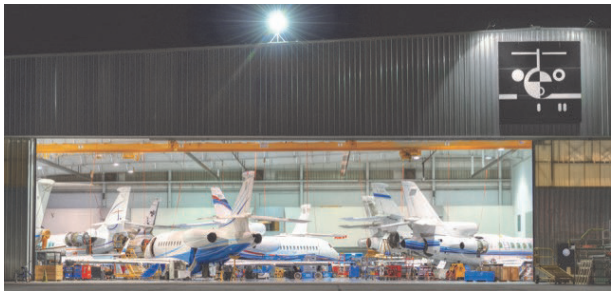

NEBRASKA AVIATION COUNTS!

Economic Impact Study

Technical Report 2019

NEBRASKA Aviation COUNTS!

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Preface — A Snapshot in Time, Jargon, Terminology, and Intended Use

Economic impact reports are a snapshot in time. Data collection methods, including surveys, interviews and reviews of available financial data, aggregate the economic impact of aviation for a State at the time the study is conducted. As discussed in Airport Cooperative Research Program (ACRP) Synthesis 7, the interdependent nature of applying spending patterns determined by survey to utilization of airport facilities from the Federal Aviation Administration (FAA) and airport records can result in the study quickly becoming outdated. When considering the collection dates of survey data and application of utilization data, this study is a snapshot of economic impact of airports in Nebraska during the summer of 2019. The COVID-19 pandemic and financial crisis had not yet unfolded at that point in time. The economic and social implications of these events are therefore not reflected in this economic impact study.

Supplemental to this written document, a web-based calculator was developed in an attempt to overcome the snapshot criticism discussed in ACRP Synthesis 7. The calculator does attempt to apply general rules to changes in airport circumstances, including capital investment and changes in utilization. The calculator is intended to assist in understanding the general nature of economic changes. It is not intended to be used as an exacting tool. An intentional effort is made in this document to avoid jargon and simplify terminology. For instance, all economic impacts that require the use of multipliers are simplified as “spin-off” impacts. It is understood that the intended use of this study is to quantify the value of airports in the State of Nebraska. The products of the report are directed at non-academic users and the general public.

1. Introduction

Nebraska's airports are vital to daily life and trade because airports connect people and businesses for personal travel, air cargo, or business activity. The state's aviation system keeps Nebraska connected to the global marketplace and drives the local economy. To better understand the aviation industry's value to the state economy, the Nebraska Department of Transportation, Division of Aeronautics (NDOT-Aeronautics) teamed with George Butler Associates (GBA), Olsson Associates, Marr-Arnold Planning, Kimley-Horn, Inc., and Dr. Christopher Decker of the University of Nebraska, Omaha to conduct an economic impact study titled **Nebraska Aviation Counts!**

"A mile of highway will take you a mile, a mile of runway can take you anywhere"

The study reveals the benefits that airports in Nebraska provide, both quantitative and qualitative in nature. Beyond the numbers, such as jobs and payroll, that an airport contributes to the economy, airports also play an integral role in the state's transportation system. As an example, a mile of road between a rural hospital and an air ambulance-capable airport may be the most important mile to saving a life. During this study, Nebraska experienced devastating flooding that resulted in communities losing highway access. Local airports served as primary depots for relief efforts and served as the only access when supplies could not be delivered by ground transportation methods.

The economic benefits of airports include providing support for jobs, generating payroll, paying taxes, and triggering spending. Airports also offer access to communities. Residents and visitors use airports for leisure and recreation, as well as business. Nebraska is comprised of more land mass than individual countries such as Ireland, Austria, Portugal, Cuba, South Korea, North Korea, and is larger than the combined land mass of the Netherlands, Slovenia, Belgium, Switzerland, and Luxembourg. The use of airports and aircraft provide a practical mechanism for economic opportunities that may not be possible using only ground transportation.

Airports also provide a base for critical support activities. Wildland firefighting, agricultural application, search and rescue, air ambulance evacuation, pipeline inspection, and provision of rural medical clinics are all examples of activities that rely on aviation and airports.

1.1 Objective of Study

The objective of this study is to quantify how aviation in Nebraska impacts the State's economy. NDOT-Aeronautics sought to quantify that impact in terms of employment, payroll, and economic impact using widely-accepted methodologies that can also be easily understood by those unfamiliar with airports or economic impact. An economic impact analysis considers the annual impacts associated with on-airport, aviation-related businesses and government organizations; capital improvement projects; military aviation; the spending of visitors who arrive by privately-owned aircraft and commercial service airlines. These impacts are quantified for each airport and are then summed to demonstrate the economic impact of aviation throughout the state.

It is important to recognize that this study represents a "snapshot in time." The data collection process, economic modeling and state of the economy capture the impacts

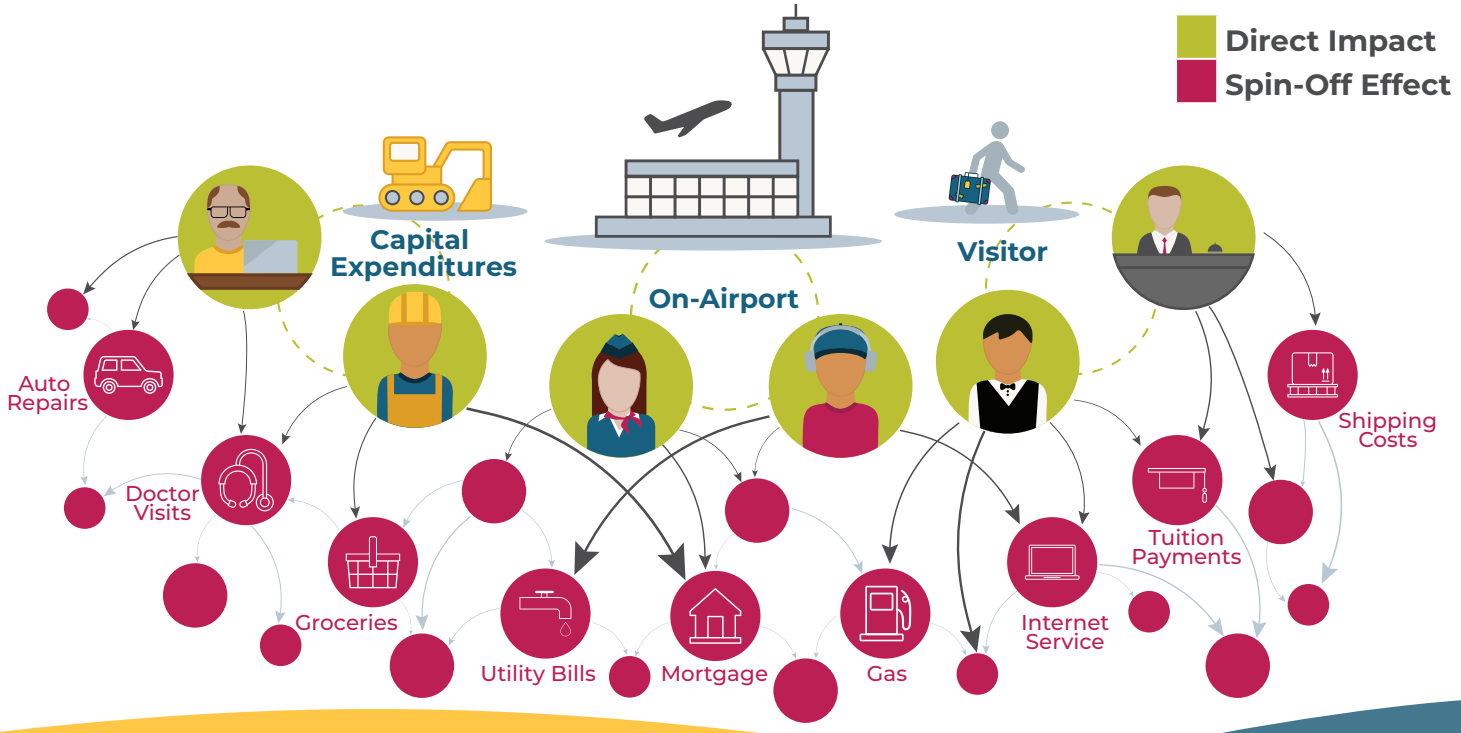
representing the timeframe between 2018 and 2019 and reflect a single year's worth of data on the statewide and individual airport economic impacts.

1.2 Overview of Approach

The first step of the Economic Impact Study was to identify the airports in the state that comprise the system and contribute to the overall economic impact of airports. A total of 79 airports in the Nebraska system with specific measurable economic impacts were included in the final analysis. Excluded airports did not significantly impact the total statewide economy. Once these airports were determined, 48 were selected to be inventoried via on-site surveys that comprised a significant amount of the data collection efforts. **Appendix A** provides a list of all airports included in the final study and provides airport-specific impacts, including spin-off effects. Once the airports were selected, economic impact terminology was confirmed with NDOT-Aeronautics to ensure transparency and clarity throughout the data collection, economic impact data analyses, and documentation processes. This study, uses the terms "direct impacts" and "spin-off effects." Spin-off effects (also known as "multiplier effects") can be further defined as "indirect" and "induced."

Direct impacts include on-airport jobs, capital expenditures on construction and off-airport visitor spending. Spin-off effects are caused when a portion of direct business revenues are used to purchase goods and services in Nebraska (i.e., indirect effects) and when the portion of revenues paid as wages to workers are spent within the state (i.e., induced effects). For example, an indirect effect occurs when an on-airport aircraft maintenance company purchases tools from a local vendor, which then recirculates the revenue from the maintenance company into the local economy. An induced impact occurs as an airport employee spends a portion of his or her wages at a local grocery store. The intertwined relationship of direct, indirect, and induced impacts is illustrated in **Figure 1.1.**

Figure 1.1 — Flow of Direct Impacts and Spin-Off Effects



Military aviation-related economic impact is also included in this analysis. The occupation types and codes associated with military aviation overlap with commercial and general aviation. Employment in the military aviation environment contributes to and reduces the available workforce for aviation-related positions in the state. The inclusion of military impacts varies among state economic impact reports. Due to the relatively significant contribution, including military aviation in this study helps to present a complete picture of the impact of aviation in Nebraska. The method employed by existing military economic impact studies is consistent with the methodology of this study and allows totals to be combined for an overall impact.

Of the airports included in this economic impact study, nine are categorized as commercial service airports and 70 are general aviation airports. This distinction is important because different types of airports generate different types of economic impacts.

Commercial service airports are typically publicly owned facilities that have at least 2,500 passenger enplanements (defined as passengers that board aircraft) each calendar year. Commercial service airports are categorized by the Federal Aviation Administration (FAA) as small, medium, large and non-hub facilities dependent upon passenger enplanement levels. At commercial service airports, business tenants often consist of airlines; fixed-base operators (FBOs); rental car, retail, and food and beverage companies; non-aviation businesses; and others. Commercial service airports also accommodate activity by general aviation aircraft which support jobs and other activities at the commercial service airports.

General aviation airports are typically public-use airports without scheduled service or less than 2,500 annual passenger enplanements. The FAA's National Plan of Integrated Airport Systems (NPIAS) evaluated seventy-three Nebraska airports, sixty-five of which are classified as general aviation facilities. At general aviation airports, economic impact is generated from charter flight companies, hangar leases, FBOs, aerial applicators, aircraft maintenance companies, aerial wildland firefighting agencies and non-aviation businesses.

1.3 Statewide Economic Impact Results

This economic impact study examines data from the state's civilian and military aviation facilities to better understand the value of Nebraska's airports from the perspective of both economic and community benefits. Specific activities and uses at each airport were examined via extensive surveys and in-person discussions with airport managers, tenants, and users to identify how these facilities support Nebraska's residents and visitors. It was determined that Nebraska's airport system:

- **Supports 90,282 jobs**
- **Generates approximately $3.5 billion in annual payroll**
- **Generates approximately $8.6 billion in total annual economic impacts**

Table 1.1 shows the total economic impact and how much is attributable to direct impacts and spin-off effects.

Table 1.1 — Total Annual Economic Impact of Nebraska's Aviation System

	Direct	+ Spin-Off	= Total
Employment (#)	60,320	29,962	90,282
On-Airport Tenants, Airport Administration and Employees ($mil)	$1,107	$893	$2,000
Commercial Service Visitor Spending ($mil)	$2,225	$1,781	$4,006
General Aviation Visitor Spending ($mil)	$257	$205	$462
Capital Expenditures on Construction ($mil)	$50	$37	$87
Aviation-Related Military ($mil)	$1,240	$852	$2,092
Total Economic Impact ($mil)	$4,880	$3,768	$8,648

Note: Values in table are rounded to the nearest $1 million. Totals shown may not exactly match the sum of individual lines.

2. Overview of Nebraska Economy

It is important to consider the economic backdrop for the study. The University of Nebraska-Lincoln (UNL) Bureau of Business Research (BBR) described 2017 as a rebalancing year for the Nebraska economy. Growth, although slow, became more balanced across industries. Through June 2018, the BBR recognized economic trends that included moderate growth. The Federal Reserve Bank of Kansas City affirmed this view in March 2019. The Kansas City Federal Reserve Bank's Policy Insights deemed the overall Nebraska economy as strong, but contained several caveats specifically "weakness in agriculture and on-going trade tensions contributed to weak growth (in the agriculture sector) in 2018."

2.1 General Economic Indicators

In 2019, Nebraska exhibited historically low unemployment with unemployment rates less than 4 percent for the last six years. The unemployment rate has remained below 3 percent since 2017.

2.2 Heartland Flood and a "Particularly Harsh Winter"

As this study was concluding the data collection phase, widespread flooding impacted many communities along the Missouri River. The impact that the Floods of 2019, or the Heartland Flood, may have the agricultural and transportation economies in Nebraska could not be known at the time of this study. Similar events in other states resulted in a greater reliance on aviation to complete tasks that were not achievable with terrestrial-based machinery. A case study on general aviation's contribution to disaster relief is contained in **Appendix C**.

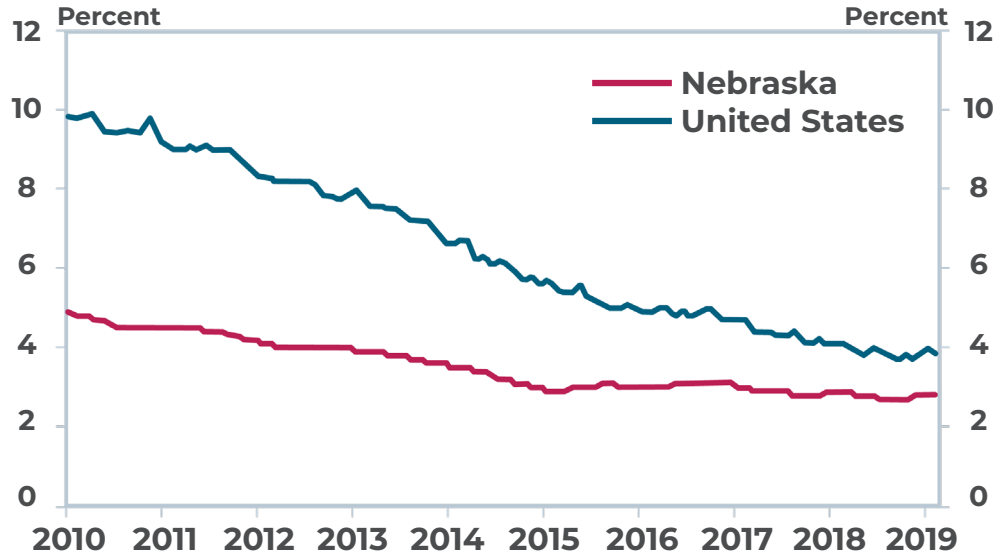
Nebraska and the Midwest experienced a "particularly harsh winter" in 2018 and 2019. According to Meterologist and Climate Specialist Jeff Berardelli, "the 2018-2019 winter has been defined by a fairly consistent, stubborn pattern featuring two distinct weather regimes. In the west, a roaring Pacific jet stream brought relentless storms and colder-than-normal temperatures. In the east, the opposite weather dominated, with mild and relatively quiet conditions. Separating the two regimes was a persistent storm track propelling storm after storm over the Midwest." The weather pattern not only created flooding but also impacted travel patterns. The enplanement pattern for Omaha slowed from 9.4 percent growth in 2018 to 2.8 percent growth for the first five months of 2019. Omaha completed 2019 with a .04 percent decrease from 2018.

2.3 Unemployment

Low unemployment in Nebraska and in the United States resulted in modest job growth in 2019. Nebraska job growth lags the national job growth rate. Since 2017, annual job growth averaged 0.4 percent as shown in **Figure 2.1**.

A tight labor market is affecting the economy in other areas. In 2017, average household wages in Nebraska increased by 7 percent. At the end of 2017, wage growth in Nebraska outpaced the national average by 3.5 percent. During early 2019, the household wages growth rate declined, but remains in line with the national average. Residential real estate values in the major metropolitan markets grew sharply, as did the average value of homes.

Figure 2.1 — Unemployment Rates



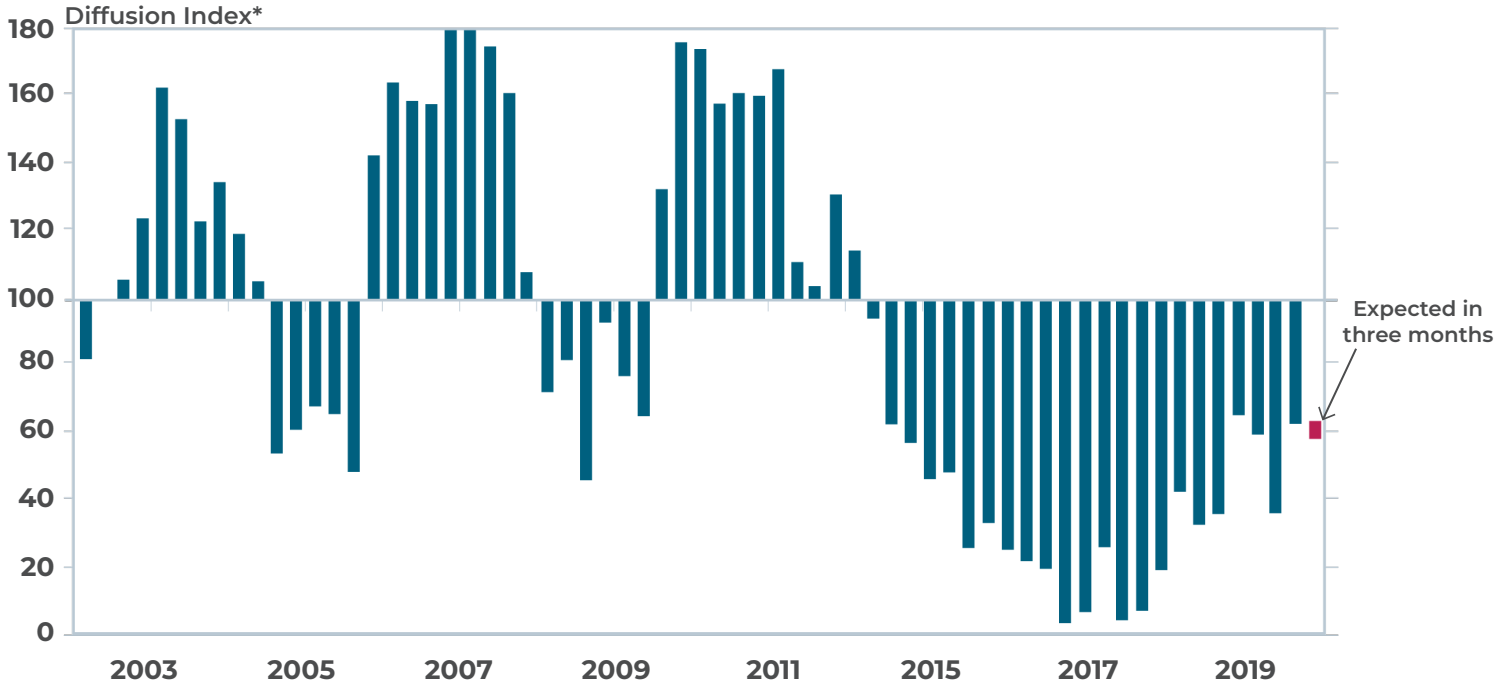
Source: Bureau of Labor Statistics

2.4 Agricultural Sector

Agriculture is the largest industry in Nebraska and Nebraska is the fourth largest crop production state in the United States. In 2017, agriculture experienced a sharp decline and the pattern continued into 2018. While economic growth in most industries in Nebraska was positive in 2018, the challenges in agriculture contribute to slower overall growth. The manufacturing sector boosted the state's gross domestic product (GDP), as did other industries outside agriculture.

As shown in **Figure 2.2**, farm income in Nebraska declined in 2018 and continued to decline in 2019, as did agricultural commodity prices. The state's exports of agricultural products remain contentious amid the on-going trade dispute.

Figure 2.2 — Nebraska Farm Income (as of September 1, 2019)



Source: Bureau of Labor Statistics

2.5 Nebraska Economy Conclusion

During the data collection phase of the study, the Nebraska economy was strong with slow to moderate growth projected in the near term. The manufacturing sector is expected to contribute positively to the results of the study and the agricultural sector will temper those positive impacts consistent with those respective sectors' impacts on the overall Nebraska economy.

3. Methods, Analysis and Summary Outcomes

In 2008, the Airport Cooperative Research Program (ACRP) published *ACRP Synthesis 7, Airport Economic Impact Methods and Models*. ACRP Synthesis 7 detailed the three traditional methods of estimating economic impact: (1) Input-Output Method, (2) Collection of Benefits Method, and (3) Catalytic Method. The input-output method is deemed by the Synthesis as the most prevalent, and as such, is the method used for most of the analysis in this study. To a much lesser extent, and for more qualitative considerations, components of the other two methods are present in this study, as requested by NDOT-Aeronautics. Qualitative benefits that might be derived from the Collection of Benefits Method are explored in this study; however, total economic impact, as discussed below, does not include totals derived from Collection of Benefits Method evaluations, such as agricultural loss prevention.

For this study, the Input-Output Method of analysis was executed using the Impact Analysis for Planning (IMPLAN) modeling system. IMPLAN is a software platform that can take economic data such as payroll and construction spending as input and combine that with databases, economic factors, demographic statistics, etc. to model how money will move through the economy and generate spin-off effects.

This economic impact analysis is based on data collected by surveying airport managers, airport business tenants, and visitors who traveled to Nebraska by commercial service or general aviation aircraft. Missing values and industry-specific information were assembled using secondary data sources, including the U.S. Department of Agriculture (USDA), spatial data mapping tools, private databases such as Hoovers and Dun & Bradstreet, and the Environmental Systems Research Institute (ESRI) GIS software.

The data collected from surveying Nebraska airports provided the direct impacts that drove the economic modeling effort for this study. The IMPLAN modeling software then calculated the total economic impact of airports on the Nebraska economy: Direct Impacts + Spin-Off Effects = Total Economic Impact. Additional information about the IMPLAN modeling system can be found at the following link: http://www.trb.org/Publications/Blurbs/157070.aspx.

3.1 Data Elements for Economic Modeling

The data assembled to drive the economic modeling effort are summarized below:

- **Airport administration:** Jobs, payroll, and expenditures
- **Airport business tenants:** Jobs and payroll businesses on Nebraska airports
- **Construction:** Annual capital expenditures on construction at an airport with 4-year averages used to avoid extreme annual variations
- **Visitor spending:** Spending by commercial service and general aviation visitors per trip by levels of spending on lodging, food, and drink; off-airport transportation; entertainment; and retail
- **Air cargo:** Value of domestic and international cargo flown into and out of Nebraska

Surveys from airport managers and business tenants were used to collect airport-specific data, including jobs by industry, capital budgets, and airport operating expenses. In cases

where responses were not obtained from all tenants at an airport, the consultant team used databases assembled by business establishments (e.g., Hoovers/Dun and Bradstreet) or GIS tools with an industry overlay (i.e., ESRI) to supplement the survey data to provide a complete analysis. Once assembled, employment data was sent to each airport for final review and confirmation. The survey methodology is described in Section 4, Survey and Data Collection.

3.1.1 Methods

Visitor spending data was estimated through visitor-intercept surveys to passengers at commercial airports, and pilots and passengers at general aviation airports statewide. These surveys enabled the consultant team to develop estimates of off-airport spending by visitors to Nebraska who arrive through the state's airports. This data was then applied to the estimates of the number of visitors at each airport. The passenger-intercept surveys were conducted during the fall of 2018 through the spring of 2019.

The number of visitors and activities vary between commercial service and general aviation airports. The primary distinction between visitors and residents was a screening tool in the physical survey. This report provides an estimate of the number of commercial airline passengers that were visitors during an identified period. For general aviation activity, which occurs at both commercial service and general aviation airports, airport managers were asked to estimate the percentage of general aviation operational activity related to visitors.

These percentages were applied to counts of itinerant or non-local operations provided by the FAA for airports with an air traffic control tower or by airport operators for airports without towers. NDOT-Aeronautics reviewed the estimates to confirm or adjust estimates based on knowledge of the individual airports.

The contribution of air cargo to the economy of Nebraska was estimated based on FAA Air Freight reports and compared to BBR analysis of exports and domestic shipments by mode.

3.2 Economic Modeling Process

The IMPLAN model was used in two ways. First, it was used to fill in missing direct metrics from incomplete survey responses for payroll and business revenues based on the relationships between jobs-to-payroll and payroll-to-business sales by region and type of industry.

Secondly, IMPLAN was used to derive spin-off effects, which show how money moves through the economy. Including these additional waves of activity in the analysis enables a comprehensive evaluation of how Nebraska's aviation system is a catalyst for generating additional economic activity. These dollars re-circulate throughout the state's economy, supporting additional employment, payroll, and spending. These spin-off effects were applied at a state level for consistency to achieve the goal of providing a single, statewide economic impact analysis.

3.2.1 Approach and Methods Used to Calculate Omaha Airport Authority Impacts

The Omaha Airport Authority elected not to participate in the statewide study, except for providing basic information regarding Millard Airport. This decision resulted in a departure from the standard methodology accepted and used by the FAA and state aeronautics

and aviation departments across the United States. To maintain fidelity with the process of performing statewide economic impact studies, the Nebraska Aviation Counts! team developed a modified approach to estimate these impacts. Unfortunately, the modified approach requires a very conservative evaluation of the data related to Omaha's Eppley Airfield and likely underestimates the actual impact of Eppley Airfield on the system.

The modified methodology utilizes the databases mentioned in **Section 3.1**, particularly ESRI, and two national studies to derive the impact of Omaha Eppley Airport:

- Federal Aviation Administration, *The Economic Impact of Civil Aviation on the U.S. Economy Economic Impact of Civil Aviation by State September 2017*
- Airports Council International (ACI) North America, *Taking America Beyond the Horizon: The Economic Impact of U.S. Commercial Airports in 2017*

Both national studies utilized recognized methodologies to calculate economic impact. The FAA report uses Regional Input-Output Modeling System (RIMS II) to estimate the economic impacts. The ACI study utilizes the IMPLAN Model.

The primary weakness of these studies is the age of the underlying data. The FAA data was collected in 2014 and published in 2017. The ACI study is based on data gathered from 493 commercial service airports in 2013. This is supplemented with statewide data collected from studies from 2013 and approximately 177 commercial service airport economic impact studies after 2013.

A second weakness in utilizing these studies is the non-specific application of impacts. Omaha-Council Bluffs, NE/IA Metropolitan Statistical Area (MSA) is the 59th largest MSA in the country with a population of just under one million people. The region includes eight counties with three of the eight located in Iowa. The typical methodology includes deploying survey takers to collect detailed travel information from commercial service passengers. Additional methods were deployed in an attempt to distinguish spending patterns and variable user habits unique to Omaha.

Upon arriving at a derived potential impact, the Nebraska Aviation Counts! team compared FAA economic data for Eppley Airfield to other medium hub airports with recently completed economic impact studies. According to the FAA *Calendar Year 2017 Enplanements at All Commercial Service Airports (by Rank), Updated 7 November 2018*, Omaha Eppley is ranked 61st in terms of enplanements. Memphis International is ranked 62nd and conducted *An Economic Assessment of the Impact of the Memphis International Airport in 2017*. The Ontario International Airport, ranked 60th, makes economic impact information available on its website at https://www.flyontario.com/airport-information/economic-impact. The Reno-Tahoe International Airport, ranked 63rd, released *Fiscal, Economic, and Industry Impact of the Reno-Tahoe Airport Authority* in August 2018. In 2015, Charleston, ranked 64th, released the *Economic Impact of The Charleston International Airport Complex*. Most recently, Orlando Sanford International, ranked 74th, participated in the Florida Statewide Economic Impact Study released in March 2019.

The comparison of the impacts derived by the FAA and ACI studies to recently completed studies at the above referenced airports resulted in minor, conservative adjustments to the

Omaha Eppley general impacts. The team decided to utilize spending per visitor numbers derived from Lincoln airport visitor spending for specific, commercial service visitor impacts.

3.2.2 Approach, Methods and Totals Used to Incorporate Military Aviation Impacts

Military aviation plays a critical role in contributing to Nebraska's economy. Federal military spending in terms of operations and operations support and salary paid to active, guard, and reserve personnel, benefits the state greatly. The largest military installation in Nebraska is Offutt Air Force Base (AFB). The Nebraska Air National Guard and the Nebraska Air Force Reserves are other military units in the state that support aviation.

The economic impacts presented in this report are based on data and information presented in *The Economic Impact of Nebraska Military Assets* prepared for the Nebraska Commission on Military and Veteran Affairs. The report, developed by BBR, was originally published in November 2017 and updated in November 2018. This report summarizes the economic impact of all Nebraska military units and veterans, and includes non-aviation related military impacts. Where feasible, non-aviation impacts were excluded from the report.

Offutt Air Force Base

Offutt AFB, located near Omaha in Sarpy County, Nebraska, is home to many of the organizations that ensure the Nation's safety, including the 55th Wing, the second largest wing in the Air Force and the largest wing in the Air Combat Command. The mission of the 55th Wing is to provide global reconnaissance, real-time intelligence gathering, command and control, information warfare, electronic attack, and combat support to the Air Force, national agencies, and joint warfighters. According to the *FY2017 Offutt Air Force Base Economic Impact Report*, the base is located on 3,633 acres with 3.0 million square yards of paved surfaces, and 4.6 million square feet of building space (154 buildings total). There are currently 43 aircraft assigned to the base.

There are 52 associate units (aviation and non-aviation related) located at Offutt AFB, including The United States Strategic Command (USSTRATCOM), one of ten unified combatant commands of the U.S. Department of Defense. USSTRATCOM is responsible for detecting, deterring, and preventing strategic attacks against the United States and its partners. Additional units at Offutt AFB include the 557th Weather Wing, the 595th Command and Control Group, 20th Intelligence Squadron (20 IS), Strategic Communications Wing One Detachment Offutt (supports the Navy's E-6B Mercury aircraft), and the 343rd Recruiting Squadron.

The majority of Offutt AFB personnel live in Nebraska. As presented in **Table 3.1**, 6,860 military personnel and 2,760 appropriated fund civilians are employed at the base. While there are additional non-appropriated fund civilians as well as base exchange and SAC Federal Credit Union employees located at Offutt AFB, they were not included in *The Economic Impact of Nebraska Military Assets: An Update for Fiscal Year 2017* analysis. Total payroll to Offutt AFB personnel was over $720 million.

Table 3.1 — Offutt AFB Military and Civilian Personnel and Payroll

	Personnel	Payroll
Active Duty Air Force	6,390	
Active Duty Army, Navy, Marines	470	
Total Nebraska-Based Military	6,860	$463,909,000*
Appropriated Fund Civilians	2,760	$256,524,000
TOTAL	9,620	$720,433,000

Sources: Offutt Air Force Base Economic Impact Analysis, FY 2017, The Economic Impact of Nebraska Military Assets: An Update for Fiscal Year 2017
***Note:** Payroll figures include payroll for 1,108 active duty military that are in the 55th Wing Overseas and not based in Nebraska.

In addition to payroll, $500.8 million in general operating expenditures were spent in FY 2017 (see **Table 3.2**). These costs can be attributed to construction, service contracts, and other federal expenditures. When payroll and expenditures are combined, $1.2 billion in total expenditures were made in FY 2017.

Table 3.2 — Offutt AFB Expenditures

Expenditure Type	Amount
Construction	$22,526,000
Service Contracts	$344,127,000
Other Federal Expenditures	$134,188,000
TOTAL	$500,840,000

Sources: Offutt Air Force Base Economic Impact Analysis, FY 2017, The Economic Impact of Nebraska Military Assets: An Update for Fiscal Year 2017

Nebraska Army National Guard and Air National Guard

The Nebraska Military Department is comprised of the Air National Guard, Army National Guard and the Nebraska Emergency Management Agency (NEMA). The National Guard (Air National Guard and Army National Guard combined) consists of 25 Readiness Installations and one Air National Guard base located throughout the state. Joint Force Headquarters supports both the Army and Air National Guard units. According to the *2017 Nebraska National Guard Annual Report*, 4,483 personnel are assigned to facilities owned and managed by the Guard. The report does not break out the personnel assigned to aviation-related assignments and *The Economic Impact of Nebraska Military Assets: An Update for Fiscal Year 2017* utilized the totals derived from the Annual Report to estimate the economic impact of the National Guard, which include both aviation and non-aviation personnel and expenditures.

The Nebraska Air National Guard has two bases in the state — one in Lincoln, located at Lincoln Municipal Airport and one at Offutt AFB in Bellevue. The primary mission of the Nebraska Air National Guard Base in Lincoln is to provide in-flight aircraft refueling via the 155th Air Refueling Wing to the U.S. Air Force and the Air National Guard. It currently

operates eight Boeing KC-135R Strato tankers. There are nearly 1,000 Air Guard members in the unit. The 170th Group operates out of Offutt AFB. The mission of the 170th Group is to provide individual training and flight operations support. There are an estimated 90 personnel associated with the 170th Group. The *2017 Nebraska National Guard Annual Report* reports there are 1,080 total personnel associated with the Nebraska Air National Guard, including 70 civilian employees.

The Nebraska Army National Guard has one C-12 aircraft and 22 helicopters. There are several aviation-related installations in the Army National Guard in the 92nd Troop Command. There are two Aviation Support Facilities under the 92nd Troop Command, Aviation Support Facility #1 located at Lincoln Municipal Airport and Aviation Support Facility #2 located at Central Nebraska Regional Airport in Grand Island. There are several subordinate units of the 92nd Troop Command that have an aviation-related mission including:

- 1-376th Aviation Regiment (Security and Support): flies UH-72 Lakota helicopters
- 2-135th Aviation Regiment: serves as the CH-47 Chinook helicopter unit under Company B, the UH-60 Blackhawk air ambulance under the Company G, 2-104th General Support Aviation Battalion. Company A, Detachment 1, 641st Aviation Regiment is the home of the C-12 military transport aircraft.
- 195th Forward Support Company (Special Operations) (Airborne): based in Omaha supports various mission both aviation and non-aviation related

Air Force Reserve

A U.S. Air Force Reserve base is located at Offutt AFB. There are 160 military and 11 civilian personnel located at the base and associated with the following five units:

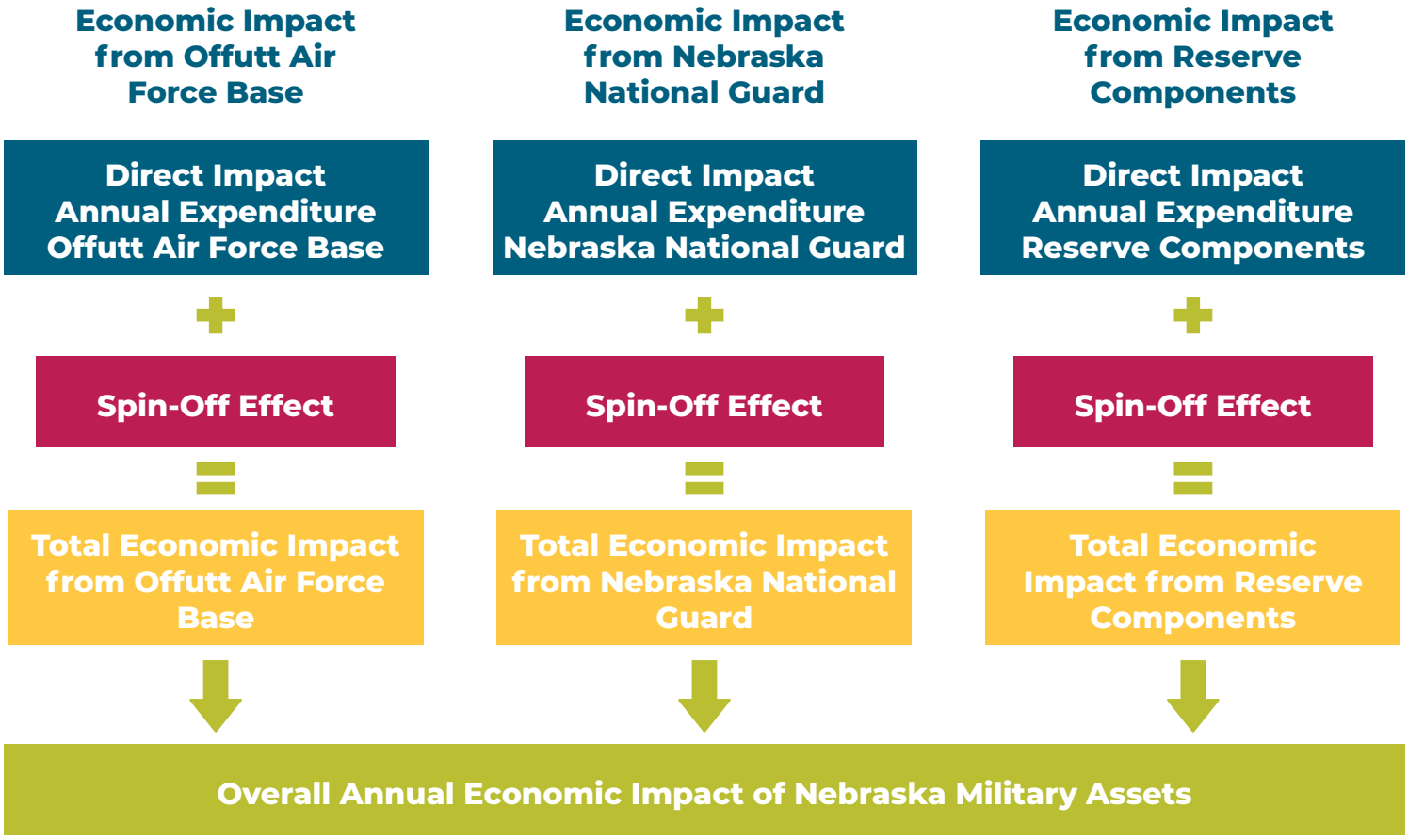
- 49th Intel Squadron (part of the 655th Intelligence, Surveillance, and Reconnaissance Group)
- 960th Network Warfare Flight (part of the 960th Cyberspace Operations Group)
- HQ Support Air Force Elements (AFELM)
- Readiness and Integration Organization Detachment
- Central Recruiting Squadron Operation

In addition to these personnel, an additional 108 U.S. Air Force Reservists are assigned to USSTRATCOM at Offutt AFB. *The Economic Impact of Nebraska Military Assets: An Update for Fiscal Year 2017*, utilized data from the Air Force Reserve Command to determine that $6.61 million in payroll and operations expenses are associated with the 279 Air Force Reserve personnel.

Total Economic Impact of Nebraska Military Assets

The total economic impact of all military assets in Nebraska was calculated by BBR in *Economic Impact of Nebraska Military Assets: An Update for Fiscal Year 2017*. This total includes both aviation and non-aviation impacts. The impact includes the direct employment and economic activity at the bases as well as the spin-off effects. BBR utilized IMPLAN model software to estimate the multiplier impact. BBR's methodology is summarized in **Figure 3.1**.

Figure 3.1 — Methodology for Economic Impact of Military Assets in Nebraska



Sources: BBR, *Economic Impact of Nebraska Military Assets: An Update for Fiscal Year 2017*

The total economic impact of military on the State of Nebraska is over 25,300 personnel, $1.3 billion in payroll, and over $2.3 billion in economic impact. The impacts of Offutt AFB, National Guard, and Reserves are shown and combined in **Table 3.3**. This table includes both aviation-related and non-aviation related impacts.

Table 3.3 — Total Economic Impact of Nebraska Military Assets

	Direct	+ Spin-Off	= Total
Offutt AFB			
Jobs (#)	11,790	6,027	17,817
Total Economic Impact ($mil)	$1,170	$810	$1,980
Nebraska National Guard (Army National Guard, Air National Guard, and NEMA Combined)			
Jobs (#)	4,480	789	5,269
Total Economic Impact ($mil)	$190	$100	$290
Reserve Forces (Air Force, Army, Marines, and Navy Combined)			
Jobs (#)	2,010	207	2,217
Total Economic Impact ($mil)	$40	$27	$67
TOTAL MILITARY IMPACT*			
Jobs (#)	**18,280**	**7,023**	**25,303**
Total Economic Impact ($mil)	**$1,400**	**$940**	**$2,340**

Sources: BBR, *The Economic Impact of Nebraska Military Assets: An Update for Fiscal Year 2017*, IMPLAN
***Note:** Table 3.3 includes both aviation-related and non-aviation-related impacts

For the purpose of this summary, the aviation-related impact of the military was estimated based on the number of aviation-related personnel that was collected. All of Offutt AFB was assumed to be aviation related. There is no breakout of aviation-related versus non-aviation-related jobs available for those working at the base.

Based on conversations with and data collected by the Nebraska National Guard, Public Affairs Officer, there are 1,150 personnel associated with the Air National Guard and an estimated 450 aviation-related personnel associated with the Army National Guard for a total of 1,600 National Guard personnel. There are 279 Reservists associated with the Air Force Reserves. All other reserve units are non-aviation related. Based on this information, a new estimate of aviation-related military impact was developed. The aviation related impact can be found in **Table 3.4**. It is estimated that just over 20,000 jobs, almost $1.2 billion in payroll, and nearly $2.1 billion in economic impact can be attributed to Nebraska's aviation-related military assets.

Table 3.4 — Aviation-Related Economic Impact of Nebraska Military Assets

	Direct	+ Spin-Off	= Total
Employment (#)	13,667	6,341	20,008
Economic Impact ($mil)	$1,240	$852	$2,092

Sources: BBR, *The Economic Impact of Nebraska Military Assets: An Update for Fiscal Year 2017*, IMPLAN, Marr Arnold Planning
Notes: Only aviation-related jobs data was collected from Nebraska National Guard and the Reserve Forces. The estimate of economic impact is based on the ratio of aviation-related jobs to total jobs for the National Guard and Reserves. All the employment at Offutt AFB was assumed to be aviation related.

Offutt Defenders of Freedom Air and Space Show

Offutt AFB hosted the Defenders of Freedom Air and Space Show in 2018 and 2019. The air show attracts visitors from all over the Midwest region. In 2018, an estimated 105,000 people attended the two-day event.

Although the economic impact of the Defenders of Freedom Air and Space Show is not available, attendees spend a tremendous amount on food, retail, and other direct expenditures at the event. Many people also stay overnight at nearby hotels and there are additional impacts associated with overnight stays in Omaha and the surrounding communities. Data was gathered on economic impact studies from other airshows around the country and the average economic impact per attendee was between $49 and $120. This figure varies by air show due to the number local visitors versus the number of non-local visitors (visitors from out of town that spend the night and thus spend more money). On average, the economic impact per visitor was $88. When this number is applied to the attendee estimate for Defenders of Freedom Air and Space Show, it is estimated that the impact was approximately $9.2 million in 2018. **This number is not accounted for in any other areas because it is a military airport.**

3.2.3 Margining for Retail

Retail sales include the cost of goods sold, defined as the price at which they were purchased from a supplier or wholesaler. Because retail sales are "re-selling" products that were already produced elsewhere, the value of the sale includes the cost of production and subsequent wholesale costs to retail establishments, the costs of transportation of the products to retail establishments, and the mark-up from those costs by the retailers.

Only the mark-up that produces revenue for retailers supports employee wages and operating costs of businesses (e.g., rents, utilities, business machines, and other business expenses)—not gross revenue collected by the retail business or industry. For example, if retail sales total $1 million, only $200,000 of these sales may be revenues earned by retail

establishments since stores may have paid $800,000 to purchase the items for sale from wholesalers or distributors. Purchases from retailers or wholesalers require margining, as only the margin (i.e., sales less cost of goods sold) is included in these industries within the IMPLAN model.

3.2.4 Rounding to Account for False Precision

All final totals for visitor spending and on-airport impacts were rounded to the nearest thousand. By rounding to the closest thousand-dollar unit, the study enhances maximum reliability and avoids misleading readers by giving the appearance of more accuracy than is warranted by the data. All job estimates are based on actual reported employment.

3.3 Analyzing Jobs, Payroll and Economic Impact

Economic impacts are measured in terms of actual economic activities or transactions for both households and businesses. The economic impacts measured in this study include:

Jobs: number of full-time or part-time jobs

Payroll: labor income earned by employees, which includes gross wages and benefits paid by employers on behalf of workers; this is sometimes referred to as "total compensation"

Economic Impact: value associated with a business or industry linked to Nebraska's aviation system as calculated in the IMPLAN model

Airports in Nebraska function as regional and statewide job centers, providing services to airlines, airline passengers, and general aviation pilots and their aircraft. In total, Nebraska's aviation system supports approximately 90,300 jobs and $3.5 billion in payroll for state residents (see **Table 1.1**).

Nebraska's aviation system also facilitates visits by out-of-state business travelers and vacationers. Off-airport spending by these visitors on lodging, food, retail goods, entertainment, and local transportation supports the state's hospitality industries. Visitors to Nebraska using commercial air and general aviation services generate about 55,000 jobs through spending in the noted industries (further details about spending are provided in **Table 3.8** for commercial service and **Table 3.9** for general aviation in a subsequent section).

Airports also connect Nebraska industries to national and international markets. By supporting technology and other industries in the state, airports return a high value to Nebraska via outbound air cargo. This enables the timely acquisition of commodities by Nebraska industries for inputs into production processes and sales via inbound air cargo. In total, Nebraska's aviation system facilitates the movement of nearly 500,000 pounds of goods between the state and the rest of the world.

3.3.1 On-Airport Activities

On-airport tenants are involved in activities such as FBOs, fuel sales, aircraft maintenance and repair, flight schools, rental car agencies, food vendors, agricultural sprayers, and other businesses that serve passengers, airlines, and general aviation pilots and aircraft. Airports with commercial services also support a wide variety of aviation-related jobs in

transportation, concessions, government, and other services. Examples of jobs found on airports include:

- Freight services, including dedicated cargo aviation, courier, delivery, customs broker, and trucking
- Air terminal operations, including security, building maintenance, and facilities management
- Federal government services, including the FAA, Transportation and Security Administration (TSA), Customs and Border Protection (CBP), U.S. Citizenship and Immigration Services (USCIS), and the Drug Enforcement Administration (DEA)
- Airline support services including catering, in-flight entertainment, aircraft handling, fueling, and maintenance
- Concessionaire services including restaurants and retail stores
- Ground transportation including rental cars, taxis, and limousine companies
- Military activities are accounted for in the military section

In addition, non-aviation-related businesses located on-airport rely upon airport property for their operations (see **Table 3.5**). In such cases, airports function as business and industrial parks with available infrastructure and support the economic development of communities and regions.

Table 3.5 — Economic Impact of On-Airport Tenants, Airport Administration and Employees

	Direct	+ Spin-Off	= Total
Employment (#)	7,175	7,764	14,939
Economic Impact ($mil)	$1,107	$893	$2,000

Sources: On-airport survey, airport manager's survey, and IMPLAN 2019

Because many of the public-use airports have small numbers of direct jobs in the on-airport tenant and administration category the payroll and jobs are aggregated for all airports with fewer than five employment positions and no direct income data is displayed. **This information was not furnished to NDOT-Aeronautics to preserve the proprietary nature of small business operations on airports.** Small business were given confidentiality assurances to avoid their information becoming subject to open records requests. **Table 3.6** provides information obtained from each airport that shows direct full-time equivalent jobs, along with their reported annual impact from spending on goods and services. Jobs shown in **Table 3.6** are the sum of all full-time on-airport jobs, all part-time on-airport jobs (based on the number of hours worked for the airport), and all seasonal jobs (translated into full-time equivalent based on the number of hours worked).

When reviewing **Table 3.6**, it is important to note that employment to operate some public-use airports is so minimal that it does not equate to one full-time job. In other instances, Nebraska airports are operated by non-compensated volunteers.

Table 3.6 — Direct Impact of On-Airport Tenants, Airport Administration and Employees

Associated City	Code	Employment	Direct Impact
Ainsworth	ANW	8	$962,900
Alliance	AIA	35	$3,225,700
Alma	4D9	8	$577,900
Aurora	AUH	11	$1,496,500
Beatrice	BIE	49	$2,326,900
Blair	BTA	10	$587,200
Central City	07K	7	$746,900
Chadron	CDR	12	$1,063,100
Columbus	OLU	15	$4,734,700
Crete	CEK	22	$939,700
David City	93Y	19	$8,989,000
Fairbury	FBY	15	$2,411,500
Fairmont	FMZ	8	$775,300
Fremont	FET	15	$2,583,900
Gordon	GRN	7	$598,900
Grand Island	GRI	186	$13,017,600
Grant	GGF	15	$906,900
Hartington	0B4	11	$1,292,000
Hastings	HIS	21	$922,800
Hebron	HJH	6	$872,000
Holdrege	HDE	24	$2,252,100
Imperial	IML	14	$1,497,600
Kearney	EAR	41	$3,178,200
Lexington	LXN	15	$1,378,900
Lincoln	LNK	2,657	$598,726,600
McCook	MCK	17	$1,036,400
Minden	0V3	6	$425,600
Neligh	4V9	19	$2,331,100
Norfolk	OFK	22	$5,738,400
North Omaha	3NO	28	$2,250,500

Associated City	Code	Employment	Direct Impact
North Platte	LBF	180	$47,891,400
Omaha Eppley	OMA	3,275	$348,024,700
Omaha Millard	MLE	28	$4,439,400
O'Neill	ONL	9	$945,600
Red Cloud	7V7	7	$330,700
Sargent	09K	7	$1,284,400
Scottsbluff	BFF	174	$16,800,000
Seward	SWT	23	$1,750,800
Sidney	SNY	5	$221,400
South Sioux City	7K8	11	$576,500
Superior	12K	11	$1,633,400
Tekamah	TQE	11	$1,452,700
Valentine	VTN	14	$689,700
Wahoo	AHQ	16	$2,167,700
Wallace	64V	6	$513,200
Aggregated Airports*		75	$10,894,000
	TOTAL	**7,175**	**$1,107,462,000**

***Aggregated Airports:** Albion, Arapahoe, Atkinson, Auburn, Bassett, Bloomfield, Broken Bow, Burwell, Cambridge, Chappell, Cozad, Creighton, Curtis, Falls City, Genoa, Gothenburg, Harvard, Hay Springs, Hyannis, Kimball, Loup City, Nebraska City, Ogallala, Ord, Oshkosh, Pawnee City, Pender, Plattsmouth, Rushville, Scribner, Tecumseh, Thedford, Wayne, York

3.3.2 Commercial Service Visitor Spending Impacts

In 2018, there were approximately 2.7 million visitors among the 5.4 million passengers using Nebraska commercial air services (see **Table 3.7**). Data collected from responding commercial service airports and passenger surveys indicated that between 47.7 percent and 52.3 percent of all passengers were visitors. While intrastate service is possible based on commercial service routing, the passenger survey concluded with no passenger indicating their origin and destination in Nebraska. The total number of passengers include the number enplaned or departing an airport and the number deplaned or arriving by aircraft at the airport. This estimate was confirmed by reference to total enplanements provided by FAA documentation.

Table 3.7 — Annual Commercial Service Visitors in 2018

Associated City	Code	Airport	Visitors
Omaha	OMA	Eppley Airfield	2,457,087
Lincoln	LNK	Lincoln	150,726
Grand Island	GRI	Central Nebraska Regional	63,298
North Platte	LBF	North Platte Regional Airport - Lee Bird Field	13,798
Scottsbluff	BFF	Western Nebraska Regional/William B Heilig Field	13,628
Chadron	CDR	Chadron Municipal	5,228
Kearney	EAR	Kearney Regional	4,568
Alliance	AIA	Alliance Municipal	2,945
McCook	MCK	McCook Ben Nelson Regional	1,174
Total Commercial Service Visitors in Nebraska			2,711,278

Source: FAA Preliminary CY 2018 Commercial Service Enplanements

Commercial service visitor spending contributes over $4 billion in economic impact to the state (see **Table 3.8**). Approximately 91 percent of the spending is associated with OMA.

Table 3.8 — Economic Impact of Commercial Service Visitors

Associated City	Code	Airport	Direct	+ Spin-Off	= Total
Omaha	OMA	Eppley Airfield	$1,992,698,000	$1,594,158,000	$3,586,856,000
Lincoln	LNK	Lincoln	$122,239,000	$97,791,000	$220,030,000
Grand Island	GRI	Central Nebraska Regional	$66,716,000	$54,040,000	$120,756,000
North Platte	LBF	North Platte Regional Airport - Lee Bird Field	$14,543,000	$11,489,000	$26,032,000
Scottsbluff	BFF	Western Nebraska Regional/William B Heilig Field	$14,364,000	$11,635,000	$25,999,000
Chadron	CDR	Chadron Municipal	$5,510,000	$4,464,000	$9,974,000
Kearney	EAR	Kearney Regional	$4,815,000	$3,900,000	$8,715,000
Alliance	AIA	Alliance Municipal	$3,104,000	$2,514,000	$5,618,000
McCook	MCK	McCook Ben Nelson Regional	$1,237,000	$1,003,000	$2,240,000
Total Commercial Service Visitors in Nebraska			**$2,225,226,000**	**$1,780,994,000**	**$4,006,220,000**

3.3.3 General Aviation Visitor Spending Impacts

General aviation passenger surveys were not conducted at all airports, nor were responses received for all airports. Because passenger surveys on visitor spending for general aviation activity included only a sub-set of airports, modified spending profiles were developed based on the size of the airport and the surveys received from airports of that size. Additionally, the consulting team applied local knowledge and a comparison with similar airports to arrive at appropriate visitor spending numbers.

To produce conservative economic values, the Nebraska Aviation Counts! team calculated the number of visitors based on dividing the number of operations by two and multiplying the airport manager's classification of operations by the percentage of itinerate operations. The team applied local knowledge and regionally comparative visitor counts to arrive at estimated visitors and compared the findings to available FAA data.

Applying five spending profiles to the estimated number of visitors for each airport in the study resulted in $162 million in payroll and $462 million in visitor economic impact across all categories of spending resulting from general aviation visitors to all 79 Nebraska airports. The economic impact from general aviation visitors is shown in **Table 3.9.**

Table 3.9 — Economic Impact of General Aviation Visitors

Associated City	Code	Employment	Economic Impact
Ainsworth	ANW	12	$999,000
Albion	BVN	5	$386,000
Alliance	AIA	62	$5,221,000
Alma	4D9	15	$1,220,000
Arapahoe	37V	2	$159,000
Atkinson	8V2	7	$605,000
Auburn	K01	7	$605,000
Aurora	AUH	36	$3,031,000
Bassett	RBE	2	$162,000
Beatrice	BIE	44	$3,645,000
Blair	BTA	44	$3,661,000
Bloomfield	84Y	6	$491,000
Broken Bow	BBW	11	$932,000
Burwell	BUB	15	$1,220,000
Cambridge	CSB	31	$2,570,000
Central City	07K	16	$1,361,000
Chadron	CDR	81	$6,815,000
Chappell	CNP	2	$194,000
Columbus	OLU	93	$7,780,000
Cozad	CZD	85	$7,139,000

Associated City	Code	Employment	Economic Impact
Creighton	6K3	7	$605,000
Crete	CEK	173	$14,492,000
Curtis	47V	3	$218,000
David City	93Y	13	$1,092,000
Fairbury	FBY	11	$934,000
Fairmont	FMZ	13	$1,077,000
Falls City	FNB	14	$1,167,000
Fremont	FET	73	$6,097,000
Genoa	97Y	1	$81,000
Gordon	GRN	5	$397,000
Gothenburg	GTE	7	$605,000
Grand Island	GRI	203	$17,075,000
Grant	GGF	51	$4,264,000
Hartington	0B4	7	$614,000
Harvard	08K	6	$492,000
Hastings	HSI	100	$8,374,000
Hay Springs	4V6	1	$97,000
Hebron	HJH	7	$605,000
Holdrege	HDE	44	$3,714,000
Hyannis	1V2	8	$640,000
Imperial	IML	58	$4,879,000
Kearney	EAR	297	$24,918,000
Kimball	IBM	15	$1,278,000
Lexington	LXN	40	$3,356,000
Lincoln	LNK	533	$43,359,000
Loup City	0F4	17	$1,220,000
McCook	MCK	204	$17,154,000
Minden	0V3	10	$874,000
Nebraska City	AFK	36	$3,051,000
Neligh	4V9	28	$2,386,000
Norfolk	OFK	39	$3,237,000
North Omaha	3NO	22	$1,865,000
North Platte	LBF	650	$54,582,000
O'Neill	ONL	25	$2,132,000
Ogallala	OGA	32	$2,701,000

Associated City	Code	Employment	Economic Impact
Omaha Eppley	OMA	621	$50,500,000
Omaha Millard	MLE	840	$68,386,000
Ord	ODX	13	$1,062,000
Oshkosh	OKS	4	$303,000
Pawnee City	50K	1	$73,000
Pender	0C4	8	$548,000
Plattsmouth	PMV	76	$6,344,000
Red Cloud	7V7	7	$605,000
Rushville	9V5	4	$305,000
Sargent	09K	4	$328,000
Scottsbluff	BFF	341	$28,659,000
Scribner	SCB	6	$497,000
Seward	SWT	58	$4,668,000
Sidney	SNY	29	$2,446,000
South Sioux City	7K8	11	$933,000
Superior	12K	7	$605,000
Tecumseh	0G3	8	$623,000
Tekamah	TQE	52	$4,347,000
Thedford	TIF	4	$328,000
Valentine	VTN	42	$3,515,000
Wahoo	AHQ	65	$5,487,000
Wallace	64V	1	$70,000
Wayne	LCG	15	$1,220,000
York	JYR	31	$2,641,000
	TOTAL	**5,573**	**$462,342,000**

3.3.4 Capital Expenditures on Construction

Capital investments are necessary to support continued operations, provide safe working and operational conditions, and, in some cases, expand operational capacity for increasing demand in aviation services. The airport manager's survey requested total capital expenditures for 2015, 2016, 2017, and 2018. Spending was verified through FAA and NDOT-Aeronautics review. Data for each airport was averaged across all four years to mitigate the impacts of any year-over-year spikes or declines in construction spending and costs. Combined, Nebraska's airports averaged $50 million in capital investments per year between 2015 and 2018. The IMPLAN software model was then used to estimate the number of jobs required to support this level of construction activity and the associated

amount of wages paid to these employees at an airport level. As presented in **Table 3.10**, 346 jobs were generated from the $50 million in average annual capital expenditures on construction. Spin-off effects generated from purchasing supplies and services and industry sales associated with employee spending result in an additional 253 jobs and $37 million in economic impact. **From 2015-2018, only 62 airports completed construction projects.**

Table 3.10 — Economic Impact of Capital Expenditures on Construction

	Direct	+ Spin-Off	= Total
Employment (#)	346	253	599
Economic Impact ($mil)	$50	$37	$87

Sources: Airport manager's survey; Calculations by Dr. Christopher Decker, University of Nebraska, Omaha

Table 3.11 — Economic Impact of Capital Expenditures on Construction by Airport

Associated City	Code	Direct Employees	Spin-Off Employees	Direct 4-Year Construction Average	Spin-Off 4-Year Construction Average	Total Economic Impact
Ainsworth	ANW	1	1	$143,000	$104,000	$247,000
Alliance	AIA	18	13	$2,646,000	$1,931,000	$4,577,000
Alma	4D9	1	1	$202,000	$148,000	$350,000
Atkinson	8V2	1	1	$181,000	$133,000	$314,000
Auburn	K01	5	4	$738,000	$538,000	$1,276,000
Aurora	AUH	6	4	$844,000	$616,000	$1,460,000
Bassett	RBE	1	0	$56,000	$42,000	$98,000
Beatrice	BIE	12	8	$1,711,000	$1,249,000	$2,960,000
Blair	BTA	4	3	$550,000	$401,000	$951,000
Broken Bow	BBW	6	4	$812,000	$593,000	$1,405,000
Burwell	BUB	2	1	$264,000	$193,000	$457,000
Central City	07K	2	1	$218,000	$159,000	$377,000
Chadron	CDR	11	9	$1,708,000	$1,247,000	$2,955,000
Cozad	CZD	1	0	$122,000	$88,000	$210,000
Creighton	6K3	1	1	$180,000	$132,000	$312,000
Crete	CEK	1	2	$235,000	$171,000	$406,000
David City	93Y	2	2	$299,000	$218,000	$517,000
Fairbury	FBY	2	1	$215,000	$157,000	$372,000
Falls City	FNB	1	1	$122,000	$89,000	$211,000
Genoa	97Y	0	0	$9,000	$7,000	$16,000
Gordon	GRN	4	3	$552,000	$402,000	$954,000

Associated City	Code	Direct Employees	Spin-Off Employees	Direct 4-Year Construction Average	Spin-Off 4-Year Construction Average	Total Economic Impact
Gothenburg	GTE	0	0	$30,000	$22,000	$52,000
Grand Island	GRI	46	34	$6,750,000	$4,928,000	$11,678,000
Grant	GGF	2	1	$211,000	$155,000	$366,000
Hartington	0B4	2	1	$217,000	$158,000	$375,000
Hastings	HSI	2	2	$300,000	$219,000	$519,000
Hebron	HJH	2	2	$310,000	$226,000	$536,000
Holdrege	HDE	2	1	$262,000	$192,000	$454,000
Imperial	IML	4	4	$692,000	$506,000	$1,198,000
Kearney	EAR	22	17	$3,243,000	$2,368,000	$5,611,000
Kimball	IBM	1	0	$94,000	$68,000	$162,000
Lexington	LXN	1	1	$126,000	$91,000	$217,000
Lincoln	LNK	57	43	$8,350,000	$6,095,000	$14,445,000
Loup City	0F4	1	0	$79,000	$58,000	$137,000
McCook	MCK	1	1	$155,000	$114,000	$269,000
Minden	0V3	1	0	$85,000	$62,000	$147,000
Nebraska City	AFK	2	2	$319,000	$232,000	$551,000
Norfolk	OFK	6	6	$997,000	$729,000	$1,726,000
North Omaha	3NO	1	0	$75,000	$55,000	$130,000
North Platte	LBF	8	6	$1,173,000	$857,000	$2,030,000
O'Neill	ONL	2	1	$247,000	$181,000	$428,000
Ogallala	OGA	2	1	$256,000	$187,000	$443,000
Omaha Eppley	OMA	57	42	$8,317,000	$6,072,000	$14,389,000
Omaha Millard	MLE	3	2	$430,000	$314,000	$744,000
Ord	ODX	2	1	$275,000	$201,000	$476,000
Oshkosh	OKS	2	1	$263,000	$192,000	$455,000
Pawnee City	50K	1	1	$148,000	$107,000	$255,000
Pender	0C4	2	1	$225,000	$164,000	$389,000
Plattsmouth	PMV	5	3	$769,000	$561,000	$1,330,000
Rushville	9V5	0	0	$53,000	$38,000	$91,000
Scottsbluff	BFF	5	4	$849,000	$620,000	$1,469,000
Scribner	SCB	5	3	$758,000	$553,000	$1,311,000
Seward	SWT	0	0	$63,000	$46,000	$109,000

Associated City	Code	Direct Employees	Spin-Off Employees	Direct 4-Year Construction Average	Spin-Off 4-Year Construction Average	Total Economic Impact
Sidney	SNY	1	0	$73,000	$53,000	$126,000
Superior	12K	1	1	$159,000	$117,000	$276,000
Tecumseh	0G3	2	1	$253,000	$184,000	$437,000
Tekamah	TQE	3	2	$424,000	$309,000	$733,000
Thedford	TIF	2	2	$315,000	$229,000	$544,000
Valentine	VTN	1	1	$182,000	$133,000	$315,000
Wahoo	AHQ	1	1	$106,000	$78,000	$184,000
Wayne	LCG	5	3	$635,000	$463,000	$1,098,000
York	JYR	1	1	$186,000	$135,000	$321,000
	TOTAL	**346**	**253**	**$50,261,000**	**$36,690,000**	**$86,951,000**

3.4 Overall Economic Impact by Airport

For each of the 79 Nebraska public-use airports, the airport's total annual economic impact is the sum of its impacts for airport tenants and administration, average annual capital investment, general aviation visitor spending, and commercial visitor spending. **Table 3.12** presents total annual economic impacts for each public-use airport resulting from each of the four economic activity centers considered in this study. As discussed in Section 3.4, total airport-specific economic impacts shown in **Table 3.12** were estimated using the IMPLAN model developed for this analysis. Impacts shown in **Table 3.12** reflect each airport's total impact on Nebraska's economy. As discussed earlier, each airport's impact on just its local economy may be less than its impact on the total state economy.

Table 3.12 — Total Airport Economic Impact

Associated City	Code	Total Employment	Economic Impact
Ainsworth	ANW	31	$2,787,000
Albion	BVN	8	$1,099,000
Alliance	AIA	221	$20,740,000
Alma	4D9	30	$2,530,000
Arapahoe	37V	7	$657,000
Atkinson	8V2	13	$1,463,000
Auburn	K01	18	$2,013,000
Aurora	AUH	61	$7,096,000
Bassett	RBE	6	$835,000
Beatrice	BIE	157	$10,418,000
Blair	BTA	69	$5,694,000
Bloomfield	84Y	13	$1,183,000

Associated City	Code	Total Employment	Economic Impact
Broken Bow	BBW	28	$3,305,000
Burwell	BUB	22	$2,348,000
Cambridge	CSB	36	$3,316,000
Central City	07K	29	$3,053,000
Chadron	CDR	243	$21,636,000
Chappell	CNP	4	$493,000
Columbus	OLU	133	$14,693,000
Cozad	CZD	95	$8,226,000
Creighton	6K3	10	$1,066,000
Crete	CEK	213	$16,637,000
Curtis	47V	6	$708,000
David City	93Y	70	$15,094,000
Fairbury	FBY	34	$5,406,000
Fairmont	FMZ	31	$2,388,000
Falls City	FNB	20	$1,881,000
Fremont	FET	91	$10,542,000
Genoa	97Y	2	$248,000
Gordon	GRN	23	$2,436,000
Gothenburg	GTE	11	$919,000
Grand Island	GRI	2,188	$171,769,000
Grant	GGF	79	$6,299,000
Hartington	0B4	27	$3,148,000
Harvard	08K	13	$1,134,000
Hastings	HSI	137	$10,509,000
Hay Springs	4V6	3	$396,000
Hebron	HJH	22	$2,781,000
Holdrege	HDE	95	$8,245,000
Hyannis	1V2	11	$1,327,000
Imperial	IML	87	$8,713,000
Kearney	EAR	533	$44,552,000
Kimball	IBM	20	$1,813,000
Lexington	LXN	72	$6,056,000
Lincoln	LNK	8,884	$1,373,504,000
Loup City	0F4	19	$1,630,000
McCook	MCK	264	$21,570,000

Associated City	Code	Total Employment	Economic Impact
Minden	0V3	22	$1,715,000
Nebraska City	AFK	48	$4,294,000
Neligh	4V9	54	$6,466,000
Norfolk	OFK	109	$13,570,000
North Omaha	3NO	83	$5,551,000
North Platte	LBF	1,397	$154,961,000
O'Neill	ONL	47	$4,224,000
Ogallala	OGA	42	$3,930,000
Omaha Eppley	OMA	51,610	$4,292,110,000
Omaha Millard	MLE	904	$77,476,000
Ord	ODX	20	$2,004,000
Oshkosh	OKS	8	$869,000
Pawnee City	50K	6	$776,000
Pender	0C4	14	$1,964,000
Plattsmouth	PMV	91	$8,471,000
Red Cloud	7V7	18	$1,187,000
Rushville	9V5	11	$1,420,000
Sargent	09K	12	$2,537,000
Scottsbluff	BFF	1,040	$86,368,000
Scribner	SCB	20	$2,336,000
Seward	SWT	97	$7,823,000
Sidney	SNY	38	$2,911,000
South Sioux City	7K8	30	$1,913,000
Superior	12K	23	$3,723,000
Tecumseh	0G3	12	$1,135,000
Tekamah	TQE	71	$7,608,000
Thedford	TIF	11	$1,342,000
Valentine	VTN	69	$5,044,000
Wahoo	AHQ	103	$9,075,000
Wallace	64V	11	$995,000
Wayne	LCG	28	$3,910,000
York	JYR	40	$3,789,000
	TOTAL	**70,274**	**$6,556,000,000**

Note: Values on each line of the table are rounded to the nearest $1,000. Total is rounded to the nearest $1 million and may not exactly match the sum of individual lines.

3.5 Summary of Economic Impacts

Table 3.13 shows the total statewide economic impacts for each of the four economic impact activity centers: On-Airport Tenants and Administration, Construction, General Aviation Visitors, Commercial Visitors. The military accounts for a fifth economic impact activity center that was studied separately but included in the overall economic impact. Statewide annual economic impacts for all airports are summarized in the following tables:

Table 3.13 — On-Airport Tenant and Administration Summary

	Direct	+ Spin-Off	= Total
Employment (#)	7,175	7,764	14,939
Economic Impact ($mil)	$1,107	$893	$2,000

Table 3.14 — Commercial Service Visitor Summary

	Direct	+ Spin-Off	= Total
Employment (#)*	35,150	14,013	49,163
Economic Impact ($mil)	$2,225	$1,781	$4,006

***Note:** Data reflects employment from solely visitor-related jobs

Table 3.15 — General Aviation Visitor Summary

	Direct	+ Spin-Off	= Total
Employment (#)*	3,981	1,592	5,573
Economic Impact ($mil)	$257	$205	$462

***Note:** Data reflects employment from solely visitor-related jobs

Table 3.16 — Construction Summary

	Direct	+ Spin-Off	= Total
Employment (#)	346	253	599
Economic Impact ($mil)	$50	$37	$87

Table 3.17 — Military Summary

	Direct	+ Spin-Off	= Total
Employment (#)*	13,667	6,341	20,008
Economic Impact ($mil)	$1,240	$852	$2,092

***Note:** Only aviation-related jobs data was collected from Nebraska National Guard and the Reserve Forces. The estimates of economic impact are based on the ratio of aviation-related jobs to total jobs for the National Guard and Reserves. All the employment at Offutt AFB was assumed to be aviation related.
Sources: BBR, *The Economic Impact of Nebraska Military Assets: An Update for Fiscal Year 2017*, IMPLAN, Marr Arnold Planning

4. Surveys and Data Collection Methods

The survey and data collection methods are separated from the general methods section of this report to provide clarity on data collection techniques used in this study.

Several methodologies were employed to gather data at airports in Nebraska. These included onsite inventories and interviews at 45 airports throughout the state; phone interviews; and electronic, hard-copy, and in-person surveys for airport managers, airport tenants, and commercial and general aviation visiting passengers. These methods were applied to gain as much data from all facets of airport operations as possible. NDOT-Aeronautics notified airport sponsors and representatives of the economic impact study surveying efforts to increase awareness and participation, as well as address any concerns regarding the detailed financial questions included in the surveys.

All information provided by the airports, business tenants, and visitors was taken into account during the development of this study. Every email, phone conversation, and hard-copy survey was documented, reviewed, and archived to create a large pool of data that was used throughout the economic impact study process. The direct economic impact and job estimates for each airport in the study were sent to the responsible airport representative for final review and concurrence prior to calculating the spin-off effects.

4.1 Airport Manager Surveys

Airport manager surveys provide great insight to the activity, functionality, and business presence at individual airports. Airport employees are only those who administer and operate airports, including airport managers and others who help care for the airport from groundskeeping to managing financial aspects of the airport. This category does not include the employees of airport tenants that operate businesses on the airport.

The airport manager surveys were administered between October 2018 and April 2019. Airport managers were asked to provide specific data on their airport's operation and administration, as well as information on the airport's tenants that have employees at the airport.

To generate accurate data, it was imperative to receive responses from 100 percent of airport representatives. Follow-up calls and emails were conducted to all airports that did not initially provide survey responses.

4.1.1 Approach

The study began by providing a focus group of five airports selected by NDOT-Aeronautics with sample surveys. The focus group reviewed the surveys for ease of use, understandability and Nebraska appropriateness. The five-airport focus group completed the airport manager survey online and participated in a conference call on the subject.

The study team reached out to Nebraska airport managers at the FAA 4 State Airport Conference in Kansas City in August 2018. This study launched at Duncan Aviation Facility in Lincoln on October 12, 2018. The kickoff provided information about the study to airport managers, airport tenants, and the public. The kickoff was attended by NDOT-Aeronautics officials.

Airport managers returned the completed survey to the consultant via U.S. mail, email, facsimile transmittal, and phone conversations. Airport manager responses were recorded in a master document.

4.1.2 Key Data

The airport managers' survey included multiple building blocks for the economic impact study. Responses to the survey provided airport-specific information including:

- Airport employees (both part-time and full-time)
- Total annual payroll paid to all employees in 2017 and 2018
- Estimated number of general aviation operations in 2018
- Percentage of transient operations
- Airport information (airport name and manager contact information)
- Airport sponsor employment data (number of full- and part-time employees)
- Airport expenditures (payroll, capital improvement spending on construction (2015-2018), and annual operating expenses)
- Airport activity (commercial and general aviation operations, number of transient aircraft, and average number of general aviation passengers per transient flight)
- Aviation activities (types of activity and descriptions)
- Special attributes of the airport
- Modes of transportation provided by the airport
- Airport business tenants, based aircraft, and local and non-local businesses utilizing the airport for business purposes

This information was used to assess the economic contribution of airport administration and capital expenditures on construction on the state economy. In addition, airport managers were asked to estimate the percentage of transient operations and average number of passengers per operation.

This data, in combination with data from the passenger visitor surveys, was used to estimate the amount and type of expenditures associated with out-of-state visitors who used commercial service and general aviation aircraft to travel to Nebraska.

4.2 Airport Tenant Surveys

Tenants at study airports, particularly visited airports, were surveyed to obtain specific information about their on-airport business. The results of the survey provided a strong sense of the economic impact that the company has at the airport and in the local and state economies.

When survey responses were not received from a tenant, assumptions were developed based on regional demographic and economic information, airport manager estimates, and other factors. The number of tenants that did not participate in the survey process was extremely small.

4.2.1 Approach

Similar to the airport manager surveys, the airport tenant survey was approved by NDOT-Aeronautics and sent to tenants with direction to return to the consultant upon completion via email. As the tenant surveys were received, a master tenant spreadsheet was created to compile all responses into one document. The spreadsheet information was sorted per the survey questions and referenced continually while conducting each airport's individual economic impact analysis. Tenant participation in the survey process was very high, and general employment and economic impact estimates were developed for the limited number of tenants unable or unwilling to participate.

4.2.2 Key Data

Each tenant located on airport property received a survey asking to provide the follow key data:

- Basic company information
- Type of business activity
- Number of full- and part-time employees in 2017 and 2018
- Total annual payroll to employees at the airport in 2017 and 2018
- Total real estate taxes paid in 2015
- Estimated business expenditures for capital improvements in 2015, 2016, 2017 and 2018
- Any additional economic benefits or services that the business provides to the local community (open-ended question)

This information provided the basis for estimating industry-specific jobs and the amount of payroll supported by aviation- and non-aviation-related businesses located on airport property. The type of business activity is particularly important because the relationship of total economic impacts varies by economic sector.

When tenants did not respond to the survey, the consultant team reached out to the respective airport managers to identify the number of employees, which is the minimum data needed for the economic analysis. This was successful in almost all cases. In the few cases in which data was unavailable via these methods, the consultant team utilized databases assembled by ESRI to estimate the tenant's employment base.

4.3 Commercial Service Passenger Surveys

Because commercial service airports serve as a gateway to Nebraska for millions of visitors each year, non-aviation businesses both at airports and off airports generate significant economic benefits. Visitors utilize aviation services to conduct business or vacation in Nebraska, leading to additional spending in hospitality sectors such as food and beverage, lodging, ground transportation, retail, and entertainment.

The passenger surveys were used to develop spending profiles for commercial airports. This figure was then compared with passenger enplanements, data on the number of visitors as developed by survey analysis, and other factors to assist with the development of direct economic impacts related to commercial service visitors from out-of-state.

4.3.1 Approach

An extensive surveying effort was conducted to accurately represent the economic impact of commercial service airports in Nebraska. In-person surveys were conducted at three commercial service airports in Nebraska for approximately three days at each airport. For the other five smaller commercial service airports, hard-copy surveys with paid return postage were left with airline personnel and on airline ticket counters for approximately two months. Omaha's Eppley Airfield was sent packets and QR-coded posters for commercial survey distribution, but elected not to participate. Posters inviting passengers to complete online surveys were also made available at all commercial service airports.

In total, over 350 commercial service passenger surveys were completed at the commercial service airports. It should be noted that the survey was administered to departing passengers to capture expenses that had already occurred. The commercial passenger survey data was compiled on a separate master spreadsheet like the airport manager and tenant survey data. The master spreadsheet was set up per the survey questions and sorted and coded to clearly display the passenger information received.

4.3.2 Key Data

After verifying that participating respondents were not residents of Nebraska, visitors were asked to provide the following information:

- Where the visitor received the survey
- Nebraska or non-Nebraska resident, visitor, or connecting passenger
- Total number of people in the party
- Purpose of the trip (i.e., business, convention, personal, or vacation)
- Major product or service provided by the company being visited, as applicable
- Number of nights spent in Nebraska
- Type of lodging (e.g., hotel/motel, private residence, camping)
- Itemized amounts of money spent during the trip in Nebraska
- Effect on the trip if the airport was not available
- Additional comments or recommendations regarding Nebraska's airports (open-ended question)

The results of this survey were used to develop an average spending profile of out-of-state visitors who used commercial airline service to arrive in Nebraska.

4.4 General Aviation Passenger Surveys

The general aviation passenger survey was similar to the commercial passenger survey except it focused on passengers on transient general aviation aircraft, including pilots. A transient aircraft is one that is not based at the arrival airport. The general aviation passenger survey measured the economic impact of general aviation visitors and pilots.

4.4.1 Approach

To conduct the general aviation passenger survey, hard copies and posters inviting

passengers to complete an online survey were distributed to approximately 30 FBOs throughout the state at both commercial service and general aviation airports. FBO managers were contacted prior to surveys being administered with instructions to post surveys and posters in highly visible and high-traffic areas at their facilities to promote participation. The responses were gathered and documented similarly to the airport manager and tenant survey data by recording all responses in one master spreadsheet. The spreadsheet was sorted by the survey questions and used frequently during the economic impact analysis effort.

4.4.2 Key Data

General aviation visitors to Nebraska were asked to categorize the following:

- Location where the survey was received
- Home zip code
- Location of based aircraft
- Number of people in the party
- Purpose of the trip (i.e., business, convention, personal, or vacation)
- Major product or service provided by their company, as applicable
- Major product or service provided by the company they were visiting, as applicable
- Number of nights spent in Nebraska during the trip
- Type of lodging
- Itemized amounts of money spent the trip
- Effect on the trip if the airport was not available
- Transportation mode that would have been used if the airport was not available

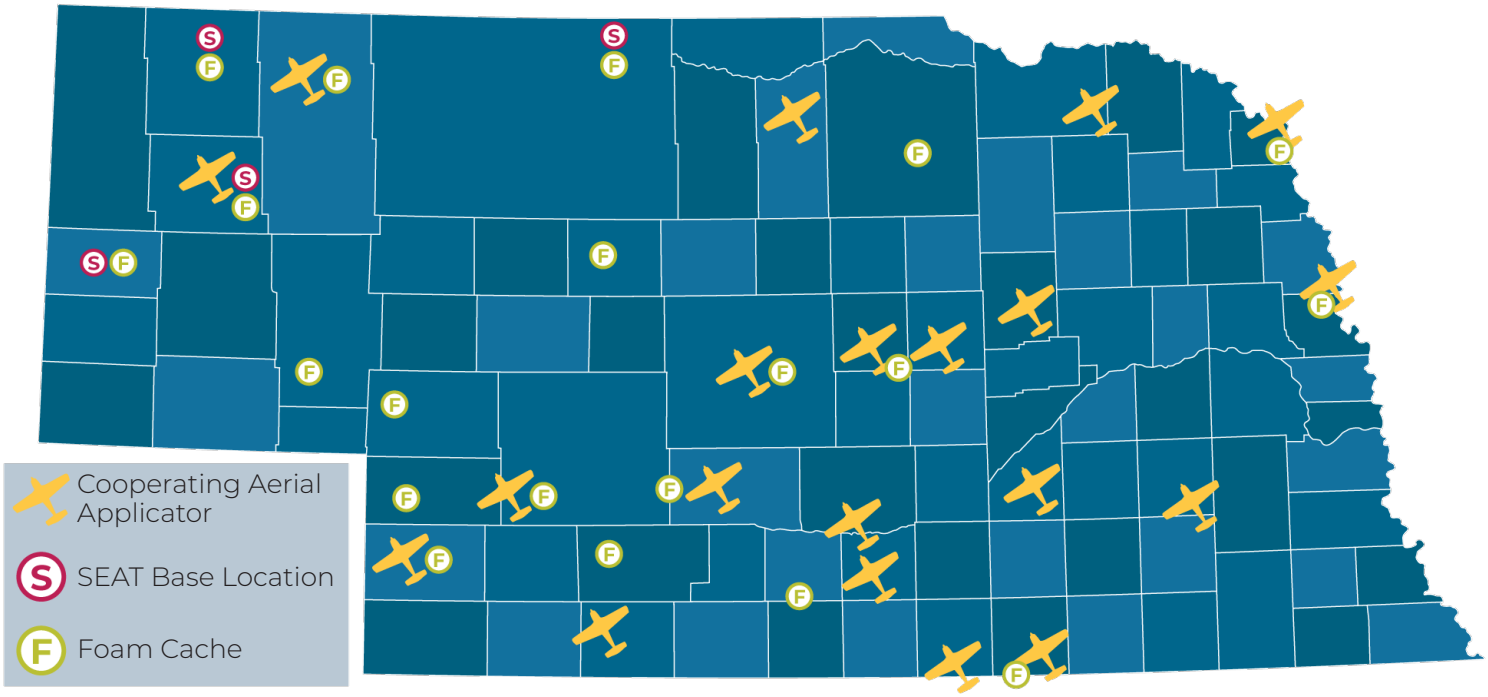
The results of this survey were used to develop average spending profiles of transient visitors who used general aviation to fly into Nebraska.

5. Aerial Wildland Firefighting

Aerial wildland firefighting is the use of fixed-wing aircraft and helicopters to combat wildfires using water, foams, and gels. Single Engine Air Tanker (SEAT) Bases were established in Nebraska after the passing of the Wildfire Control Act in 2013. During fire season, the Nebraska Emergency Management Agency contracts SEAT bases which are staffed by the Nebraska Forest Service (NFS). This also includes smokejumpers who parachute and firefighters who rappel from helicopters into wildfires. Aerial wildland firefighting is an integral component of aviation throughout the state of Nebraska. In addition to the four permanent SEAT bases in Nebraska, a mobile SEAT base provides support at airports as needed.

Across the state, 22 aerial applicator companies with 45 airplanes work in cooperation with the NFS for aerial fire suppression (see **Figure 5.1**). To provide rapid-response services, 20 locations across the state are equipped with firefighting foam specifically for aerial wildfire suppression. The service protects lives, property, and natural resources of all wildlands in Nebraska.

Figure 5.1 — Nebraska Aerial Wildland Firefighting Bases



While these agencies do not have a presence at every airport in Nebraska, many airports in the state accommodate aerial wildland firefighting operations on a full- or part-time basis.

Approximately 31 airports were identified as supporting aerial wildland firefighting operations, either as a base or alternate airport suitable for wildland firefighting. It should also be noted that wildland firefighting agencies are inherently mobile. Agencies typically follow fires and move their aircraft to different airport locations throughout the state as necessary.

5.1 Benefits

Aerial wildland firefighting has a significant direct impact on Nebraska's airports and local communities. According to the ACRP *Synthesis 32 Report: Managing Aerial Firefighting Activities on Airports*, "airport operators estimated that from three to eight percent of the local economy is generated by government activities directly related to wildland firefighting suppression activities." The report notes that "the primary source of cost recovery for the airports came in the form of fuel flowage and landing fees. Additional income generators for the airport were rental cars, commercial flights by firefighting agencies, ground/property rental, and fuel sales by the airport and/or the airport's FBOs" (Phillips 2012, 9).

In addition to these direct economic impacts, the same ACRP report notes that spin-off effects can significantly bolster local economies, particularly in areas without a diverse and robust economic base:

"[The] positive economic benefits to a community resulting from an aerial wildland firefighting operation (either permanent or transient), include increased use of hotels, restaurants, grocery stores, gas stations, laundromats, rental car leasing, catering services, portable restrooms, and equipment rental ." (Phillips 2012, 18)

In addition to these direct impacts and spin-off effects, Nebraska's aerial firefighting operations help to ensure the safety of residents and visitors, protect property and natural resources, and reduce the risk of catastrophic wildfires that can negatively impact air quality and key industries such as tourism. Aerial wildland firefighting is also typically safer than ground operations for firefighters. Because wildland fires spread rapidly, ground crews can be caught off-guard. An aerial approach can mitigate these circumstances.

6. Value of Aircraft Assets in Nebraska

The study team constructed a model combining the FAA aircraft certification database and a simplified valuation table based on commercially-available aircraft valuation programs to determine the value of aircraft assets in Nebraska. The interactive map shows the number, age, and approximate value of aircraft in the state of Nebraska at www.nebraskaaviationcounts.org.

The purpose of the aircraft valuation map is to demonstrate the investment in aircraft assets in the state.

7. Air Cargo

Air cargo is the fastest mode for transporting goods, but it is also the most expensive. For companies that rely on just-in-time delivery, or when a key component is needed quickly, air cargo provides an important service for their business needs. Most of the air cargo today is transported by expedited carriers (e.g. FedEx, UPS) who serve large hub airports and provide feeder service to smaller airports. There are several other companies that provide air cargo service at Nebraska airports including USA Jet and Atlas. There is very little specific data available for air cargo shipments, and the economic impact related to air cargo activity is difficult to measure.

In Nebraska, according to the U.S. Department of Transportation (USDOT), 10 airports accommodated scheduled air cargo operations in 2017. These airports are shown in **Table 7.1**. Omaha Eppley Airfield is the largest air cargo airport in the state accommodating nearly 37,000 tons. FedEx is the largest air cargo carrier in the state.

Table 7.1 — 2017 Air Cargo Tonnage at Nebraska Airports

Airport	Carrier	Freight and Mail (in tons)
Omaha Eppley Airfield OMA	FedEx	20,681
	UPS	12,040
	Delta	1,186
	United	1,088
	American	778
	Alaska	349
	Southern Air	188
	Southwest	137
	Other	17
	Total	**36,464**
Central Nebraska Regional GRI	FedEx	257
	USA Jet	2
	Total	**259**
Kearney Regional EAR	FedEx	**196**
Offutt AFB	FedEx	35
	Atlas	76
	Total	**111**

Airport	Carrier	Freight and Mail (in tons)
North Platte Regional LBF	FedEx	**72**
Western Nebraska Regional BFF	FedEx	**71**
Lincoln Municipal LNK	United	9
	USA Jet	1
	Total	**10**
Fremont Municipal FET	FedEx	**1**
Searle Field OGA	FedEx	**1**
Sidney SNY	FedEx	**1**
	TOTAL	**37,186**

Source: USDOT, Schedule T-3

Ameriflight, a Part 135 air cargo carrier, also operates a small cargo base located at Omaha Eppley Airfield utilizing Beech 99 aircraft. The carrier serves several other Nebraska airports including O'Neill Municipal, Norfolk Regional, Broken Bow Municipal, Kearney Regional, Central Nebraska Regional, Hastings, and Beatrice Municipal. According to the Nebraska State Freight Plan completed by Cambridge Systematics, in 2016 there were several other small cargo carriers offering express delivery service in Nebraska including Key Lime Air, Bemidji Aviation, Baron Aviation, and Suburban Air Freight.

8. Aerial Application

Nebraska's economy is dependent on agriculture because it is the largest industry in the state. Nebraska is the fourth largest agricultural economy in the United States and is second nationally in cattle production. There are an estimated 45.2 million acres operated as farms in Nebraska; 35.7 million acres are cropland, and 9.5 million acres are rangeland. The crops with the highest production are corn, soybeans, and wheat.

Nebraska is the fifth largest agricultural exporting state in the country, exporting $6.6 billion in agricultural goods in 2016, three times the amount exported in 2000. Nebraska Farm Bureau notes that the top exports include soybeans, corn, beef, distiller grains, and pork. Every dollar in agricultural exports generates $1.28 in economic activities such as transportation, financing, warehousing, and production. Nebraska's $6.6 billion in agricultural exports in 2016 translated into $8 billion in additional economic activity in the state.

Aerial applicators in Nebraska support $21.3 billion in crop and grain sales. Aerial application permits large and remote areas to be treated quickly and economically and results in greater crop yields. There are 436 aerial applicators currently registered with the Nebraska Department of Agriculture. According to an article published in the National Agricultural Aviation Association Magazine, in 2015, it was estimated that 321 aircraft use 66 of Nebraska's public-use airports to support aerial application. This would equate to 4.0 aircraft per public use airport in Nebraska. Using the Aircraft Valuation tool identified an estimated value of $46 million worth of agricultural aircraft registered in Nebraska. The number of publicly-owned and privately-owned airfields is crucial to the success of application. Applicators need to be in proximity to the farms they are spraying because the pilots have to return to the airfield frequently to refill the tanks with chemicals. Each plane can hold an estimated 500 gallons of chemicals and it takes a pilot about 45 minutes to empty a tank. One full tank can be used to spray approximately 100 acres. It is estimated that what it would take a farmer to apply in a day on the ground, takes one hour by air.

Every year, a variety of products are applied by aerial applicators to crops and rangeland in Nebraska. Pesticides are applied to control insects, fungicides battle fungal diseases, and herbicides eradicate weeds. Some chemicals, such as herbicides, are typically applied every year, while others, such as fungicides and insecticides, are applied only as needed. Outbreaks of crop-damaging bugs or plant-killing fungus may only occur every few years but can threaten the economic viability of an entire crop. Planes can also apply fertilizer to improve yields, and can also spread the seed for some cover crops. Planes can plant seed when rainy conditions make fields too muddy for tractors and planters.

The economic impact of aerial applicators in Nebraska is significant, yet difficult to calculate. This is largely due to difficulty quantifying the degree to which aerial applicators enhance the yield of agricultural crops. One way to estimate how aerial applications benefit commecial agriculture in Nebraska is to extrapolate data from the USDA and the National Agricultural Aviation Association (NAAA).

According to a USDA Economic Research Service Report, about 70 percent (286 million acres) of the United States' 408 million acres of cropland, is commercially treated with crop

protection products. The aviation industry treats approximately 71 million acres of that cropland aerially each year. If these numbers are broadly applied to Nebraska's 35.7 million acres of total cropland (excludes rangeland), approximately 25 million acres are commercially treated, and 25 percent of that 25 million acres (approximately 6.25 million acres) are likely treated with aerial application. The value of the crops that are likely treated via aerial application was not calculated in this report.

Another benefit of aerial application is that it allows farmers to prevent crop loss from ground trample. Based on a study by Purdue University, ground applicator rigs can damage approximately 1.5 to 5 percent of crops due to trample. Using a conservative crop-loss equation comparing the use of traditional ground application machinery versus aerial application, aerial application might preserve as much as $130 million in crops that would otherwise be lost due to trample by ground application machinery. Various studies indicate a 7 percent or greater increase in yield compared to untreated crops. Based on these studies, it can be estimated that $651 million in crop preservation can be attributed to the use of aerial application on the estimated 6.2 million acres of Nebraska's crops that receive treatment per year. The total impact of aerial application on the state's economy when a spin-off effect is included is $1.05 billion.

9. Regional Airline Service Challenges and the Impacts on Nebraska Airports

The reader will note at the time this document was published, there was no longer a pilot shortage. In fact, the opposite problem unfolded in the wake of the COVID-19 pandemic and financial crisis that followed, where planes were parked, unutilized and pilots were being furloughed. Despite these changing conditions, the information contained in Section 9 of this document is still included because it represents the real conditions that were shaping the aviation industry at the time data was collected for this economic impact study. As such, the information in this section is important and relevant to this study, even though it is actively changing at the time of publication of this document.

Having airports with scheduled commercial airline service is important for Nebraska's economy because they connect Nebraska to the global economy. Unfortunately, the small airports in Nebraska have struggled to attract and maintain flights and passengers over the last 15 years.

There are an increasing number of obstacles to obtaining and maintaining air service in small communities. The economics of short-haul markets to small cities are challenging to overcome. As airlines continue to look for ways to increase revenue and decrease costs, communities whose service is provided by a single carrier find themselves at risk. As aviation fuel prices increase, some airlines respond by eliminating underperforming routes, making the hurdle even higher for new or improved service to be launched. In recent years, the industry has also been constrained by a regional airline pilot shortage. This means that air service development at smaller airports has become even more competitive and challenging.

9.1 Nationwide Pilot Shortage

There is an ongoing pilot shortage that has been impacting every airline in the industry over the last several years. There appears to be no end in sight. In 2017, there were 609,000 pilots in the US, which is down 30 percent from 30 years ago. The number of pilots has fallen due to 9/11, airline mergers, the economic recession, and the soaring cost and dwindling interest in becoming a pilot. However, more people flew in 2018 than ever before, and the number of passengers is forecasted to grow over the next 20 years.

Regional airlines are facing the brunt of the pilot shortage. As pilots retire, major airlines will continue pulling talent from regional airlines, leaving those carriers to scramble to find qualified people to fly their planes. The regional carriers in the U.S. and the airports that depend on them have been impacted by the current shortage of qualified pilots.

According to Boeing, airlines will need 790,000 new pilots around the world in the next 20 years. Boeing also predicts a global need for 750,000 technicians and 890,000 new cabin crew members in the next two decades. The Boeing study finds the need to recruit an additional 206,000 new airline pilots in North America alone.

In 2013, the FAA published a rule requiring airline pilots to have at least 1,500 hours of flight time, up from a previous minimum of 250 hours before a pilot can earn their air transport license (ATP) and fly commercially. The rule was created to create a safer flying experience. However, that extra flight time can add two years and more than $100,000 in expenses over and above the expectations prior to the FAA ruling.

An aviation degree-holder benefits from a lower threshold for required flight hours. A graduate of an FAA authorized institution needs only 1,000 flight hours to fly commercially if he or she earned a bachelor's degree in aviation. Graduates with an associate's degree need to log 1,250 flight hours to earn an airline transport pilot certificate. Ex-military pilots are able to get their ATP with 750 hours of flight time. Some experts say more exemptions are needed if the pilot shortage is to be addressed. But proponents of the rule, including pilot unions, say the existing rule ensures more qualified pilots are flying.

U.S. regional airlines are paying pilots to train to fly commercial aircraft to ease a global pilot shortage that threatens industry growth as travel demand booms. To hire new pilots, regional airlines are offering tuition reimbursement, sign-on bonuses, and higher salaries. Most regional airlines are even giving conditional job offers to pilots before they reach their required number of flying hours in order to secure them early. Another favorable development for pilots is better pay. Aviation graduates can expect entry-level wages from $70,000 to $80,000, up dramatically from $25,000 to $30,000 just five years ago for regional airline pilots. Despite these efforts to try to get more pilots into the pipeline, it is anticipated that the airlines will still be impacted for many years by the ongoing struggle to get trained pilots online quickly.

9.2 The Impact of the Pilot Shortage on Nebraska Airports

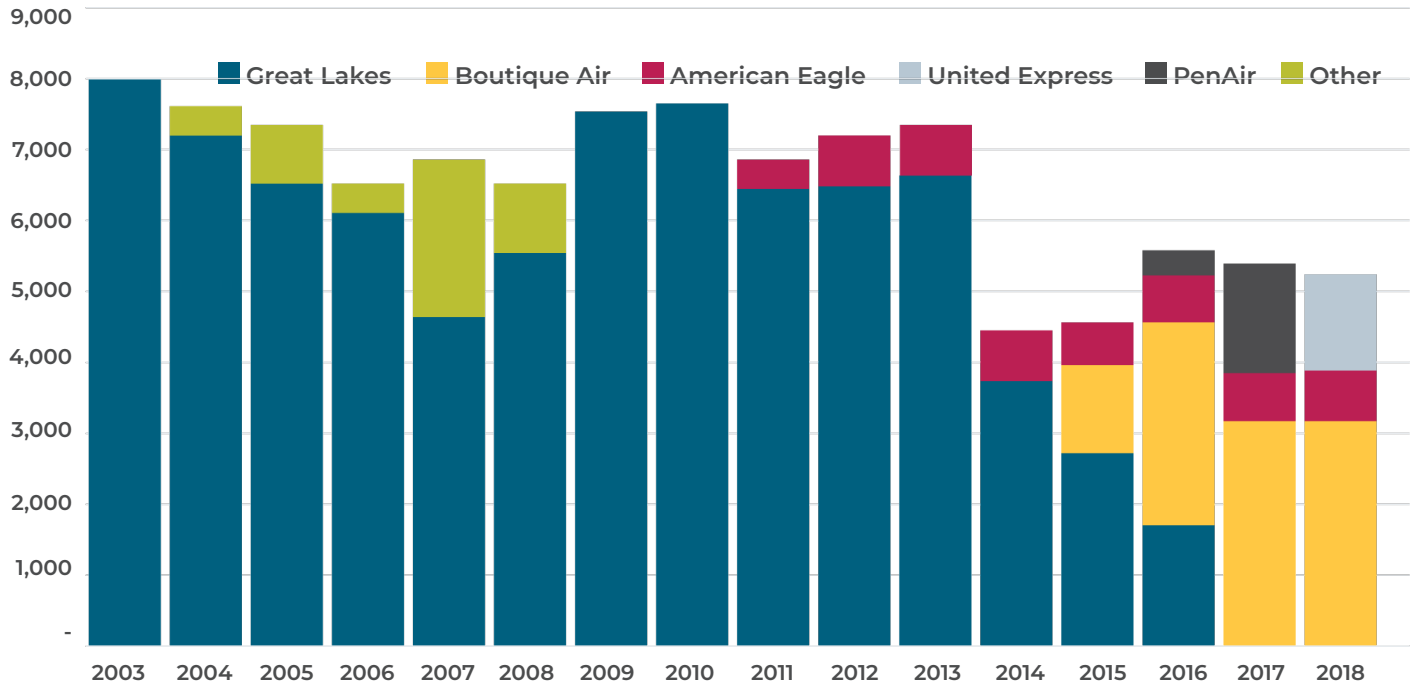
The regional airlines providing service in Nebraska continue to feel the impact of the pilot shortage. Great Lakes Airlines served Nebraska's Essential Air Service (EAS) airports for decades before leaving the state after years of struggling with the new realities of the pilot shortage. EAS is a government program that subsidizes air service to small airports across the United States. Great Lakes was among US carriers to raise concern about FAA's flight hour rule as it stunted their new pilot pipeline. Great Lakes noted the cost of reaching the 1,500-hour threshold dissuades pilots from choosing an airline career, and they say the smallest regional carriers have been hardest hit.

According to a Great Lakes 2015 EAS filing "It is difficult for a turboprop operator such as Great Lakes to compete for qualified pilots with other airlines operating larger jet equipment. These jet operators have greater revenue-generating capability due to the greater number of aircraft seats, and therefore can afford to offer higher compensation. All of these factors put Great Lakes at a disadvantage, and the result is that small community air service is being lost as we reduce our level of operations to match pilot supply."

In 2013, Great Lakes requested that the FAA grant it an exemption from the 1,500-hour rule on the condition that it limit 19-seat Beechcraft 1900Ds to nine passengers. Nine-passenger aircraft fall outside the 1,500-hour rule requirement. The FAA granted that request. But the damage already caused by Great Lakes' flight cancellations and delays due to the pilot shortage was too great to overcome. The carrier exited the last four Nebraska EAS markets in 2016, as shown in **Figure 9.1**, leading to 29 percent fewer flight departures in 2018 compared to five years earlier.

Other small regional airlines have likewise shuttered operations or struggled financially in recent years. PenAir took over the EAS air service routes of several Nebraska communities from Great Lakes. This small regional carrier struggled as well due to the pilot shortage and declared bankruptcy in September 2017.

Figure 9.1 — Historic Annual Scheduled Flight Departures by EAS Carriers in Nebraska



Source: *Official Airline Guide*

9.3 Fewer Carriers Available to Serve Small Communities

Airline consolidation that occurred in the mid-2000s, has left only four network carriers. The consolidated airlines continue to operate based on cost cutting and are driven by profit margins. There isn't much leeway when it comes to achieving profitability for carriers that help to transport passengers on short-haul routes. The trend in strong growth of the 37 to 50 seat regional jet (RJ) in 1990s and early 2000s to replace turboprop aircraft in small markets ended following the spike in jet fuel costs during 2007-2008. It was no longer as economical to fly RJs to provide service to short-haul markets. The cost, coupled with the economic recession and curtailed demand, led to the rapid retirement of small RJs throughout the network. Many network carriers migrated to aircraft with higher capacities in search of lower costs.

Small community airports will continue to struggle to receive network carrier service due to the economics. This has left small communities with few choices in terms of carriers and equipment. Many network carriers have shown a clear desire to exit the smallest markets, as their planes are too large to make a profit on many of the small airport routes.

As network carriers and their affiliates exited many EAS markets over the last decade, EAS service shifted to small carriers that operate fleets mostly of small Cessna or Beechcraft aircraft with 8-19 seats. These small regional airlines, such as Boutique Air, Denver Air Connection, or Cape Air moved in to replace this service but often a community's global connectivity to the transportation network suffered and enplanements often fell.

However, the small RJs continue to have a presence in carriers' route networks, albeit to a much lesser extent. SkyWest, a regional partner of United and Delta, still flies a large number

of 50-seat RJs. SkyWest has been flying to more and more EAS markets over the last five years. Nebraska has also seen a shift in network carriers entering the state to serve EAS routes. Several airports in the state including Kearney, Scottsbluff, and North Platte have worked hard to find alternate service after the pilot shortage crippled their existing carriers. SkyWest now provides the EAS service to these three communities on the 50-seat CRJ-200. American Eagle is serving Grand Island as well with RJs. However, it is expensive, and subsidies are high. The annual subsidies to fly this aircraft on Nebraska routes are more than double what they were a few years ago.

There are currently just 10 carriers providing EAS service in the lower 48 states. **Table 9.1** lists these carriers. SkyWest, the carrier providing service at Kearney, North Platte, and Scottsbluff is currently serving the most EAS communities in the U.S. Boutique Air is the largest small/non-affiliated airline to provide EAS service. Boutique Air currently serves Chadron and McCook.

Table 9.1 — Carriers Providing Service at EAS-Subsidized Communities

Carrier	Equipment	# of EAS Markets Served	States Currently Serving
Advanced Air	King Air 350	1	NM
Air Choice One	Cessna Caravan	6	AR, IA, MI, TN
American Eagle	ERJ 140/145	3	IA, KS, **NE**
Boutique Air	Pilatus PC-12/King Air 350	17	AL, AZ, CA, CO, KS, MN, MS, **NE**, NM, NY, OR, PA, TX
Cape Air	Cessna 402	15	IL, KY, ME, MO, MT, NH, NY, VT
Denver Air Connection	Metroliner 23	1	**NE**
Silver Airways	Saab 340/Beech 190	25	AL, MS, MT, NY, PA, WV
SkyWest (UA, AA, and DL)	CRJ-200	43	AZ, CO, IL, KS, KY, MI, MN, MO, MS, MT, ND, **NE**, NY, SD, UT, VA, WI, WV, WY
Southern Air Express	Cessna 208	10	AR, MD, PA, WV
United Express	ERJ 145	3	ME, ND, WY

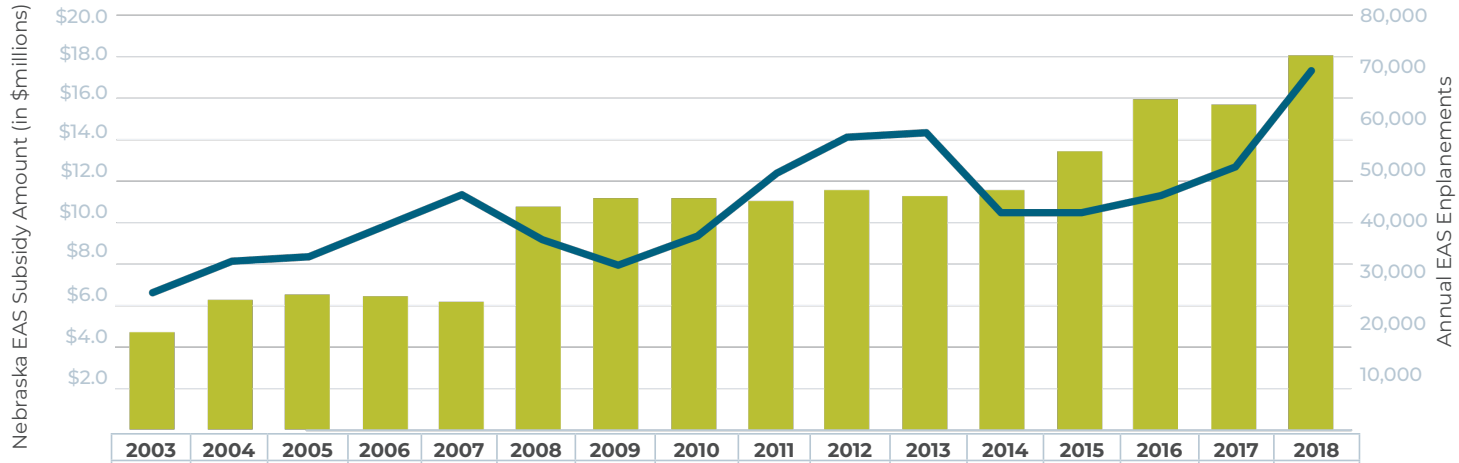
Source: USDOT

9.4 The Continuing Rising Cost of Essential Air Service

The EAS government program is a critical tool for sustaining the viability of small airports in Nebraska and nationwide. In Nebraska, seven commercial service airports are part of the EAS program; only Omaha and Lincoln do not receive EAS funding. **Figure 9.2** presents the rising subsidies in Nebraska over the last 15 years. In 2003, the total EAS subsidies in Nebraska were $4.8 million. Great Lakes was serving all of the markets in 2003. By 2018, subsidies at the seven EAS communities combined was $18.1 million. This represents an average annual increase of 9.3 percent over the 15-year period. EAS-related enplanements were up 6.7 percent per year on average over the same period. The average statewide subsidy per passenger was $180 in 2003 and increased to $261 by 2018, growing 2.5 percent per year

on average. EAS subsidies are growing at a higher rate than enplanements, not only in Nebraska but throughout the US.

Figure 9.2 — Historic EAS Subsidies and Enplanements at Nebraska Airports



	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
EAS Subsidy	$4.8	$6.3	$6.5	$6.5	$6.2	$10.7	$11.2	$11.2	$11.1	$11.6	$11.3	$11.6	$13.5	$15.9	$15.7	$18.1
Enplanements	26,386	32,323	33,480	38,359	45,798	36,811	32,498	36,966	48,821	56,754	57,627	41,614	40,949	44,544	51,052	69,508

Source: USDOT

Due to the soaring costs and fewer passengers flying from small airports, the sustainability of the EAS program is questionable, especially during a time when the federal government is looking to cut costs wherever possible. In addition to the limited number of EAS carriers noted above, subsidy needs are growing due to an aging aircraft fleet and increasing airline labor/pilot costs. Since 2001, Congress and the USDOT have worked to streamline the EAS program and make it more efficient, mostly by eliminating subsidy support from communities within a reasonable driving distance from a major hub airport. However, in recent years it was apparent that more changes to the program were needed. Recent rule changes by Congress have had a significant effect on program size and market eligibility. However, EAS program expenditures have increased, more than doubling in inflation-adjusted terms between 2008 and 2018.

The recent EAS eligibility and participation rule changes are summarized below:

- Limit the per passenger subsidy cap for all cities (2011). Congress blocked subsidies from exceeding $1,000 a passenger in any market.
- Limit the per passenger subsidy cap based on proximity to hub airports (2011). Communities are not eligible for EAS subsidy if they require a rate of subsidy per passenger in excess of $200, unless the community is more than 210 miles driving distance from the nearest medium or large hub airport (as classified by the FAA).
- Waive requirement on aircraft size (2011). Congress waived the rule that EAS service must be provided on at least 15-seat twin engine aircraft. Communities can no longer veto service proposals involving smaller aircraft usage.
- Bar new entrants to the EAS program (2012). Only cities that were in the EAS program in FY2011 are eligible for future EAS subsidies.

- Airports must average 10 enplanements per day (2013). Unless the airport is more than 175 miles from a large or medium hub airport, cities must not fall below an average of 10 enplanements per day to be renewed when current contracts are up.

Several US markets have lost service for exceeding the per passenger subsidy cap of $1,000. With continued increases in the subsidies and no increase in enplanement levels, some airports are dangerously close to exceeding the USDOT's per passenger subsidy cap. The continuation of the EAS program will be under scrutiny in the future. The aircraft fleet available to serve EAS markets is aging with almost no new aircraft types to replace it.

Any additional EAS rule changes would have the potential to impact air service in Nebraska. Nebraska's EAS airports should continue to work on their marketing and public relations to attract and retain high passenger volume. It is imperative that EAS airports look to reach self-sustaining enplanement levels while working closely with their Congressmen and Congresswomen and representatives to ensure the EAS program remains intact into the future.

9.5 Nebraska Historic Regional Air Service Overview

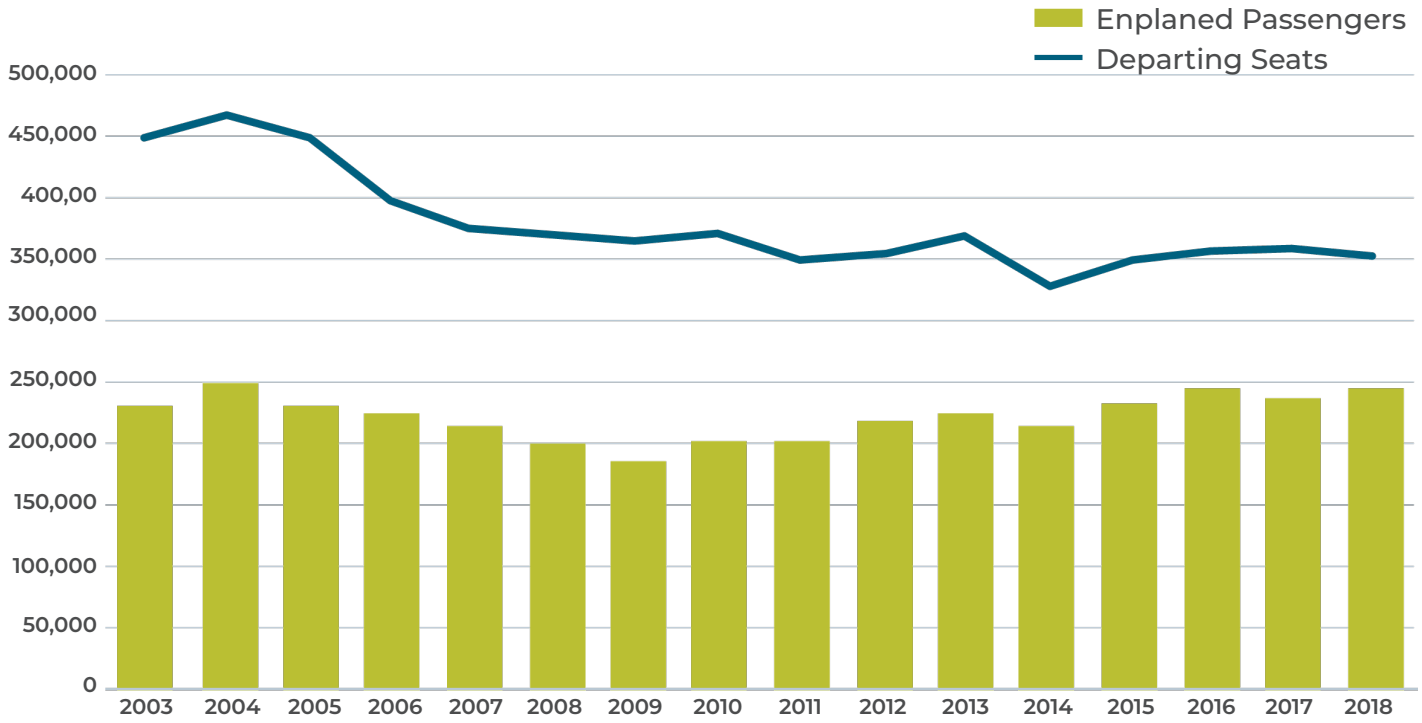
The historic air service provided at Nebraska airports and enplanement levels highlights the impact of the changing regional airline industry. Besides Omaha Eppley Airfield, the largest airport in the state which is not included in this analysis, Nebraska has eight other commercial service airports that have scheduled airline service. These are shown in **Figure 9.3**. Seven of these eight airports qualify for USDOT's EAS funding, including Alliance, Chadron, Grand Island, Kearney, McCook, North Platte, and Scottsbluff.

Figure 9.3 — Nebraska Commercial Service Airports

The eight airports served approximately 248,000 enplanements in 2018. Most enplanements occurred at Lincoln Airport (59 percent) or Grand Island (25 percent). As shown in **Figure 9.4**, enplanements at Nebraska's commercial service airports (excluding Omaha) grew at an average annual rate of 0.5 percent between 2003 and 2018. After declining passenger and service levels between 2004 and 2009, passenger levels increased in 2010 and peaked in 2018 at 248,000 enplanements. Enplanements reached a low of 188,000 in 2009 in the midst of the economic recession and airline cost-saving cutbacks. The number of scheduled

departing seats fell drastically between 2004 and 2009 as well but have remained relatively unchanged since 2015.

Figure 9.4 — Historic Enplanements and Scheduled Departing Seats (2003-2018) Nebraska Commercial Service Airports, Excluding OMA



Source: Bureau of Transportation Statistics T-100 Market data, Official Airline Guide

Over the last 15 years, the average number of scheduled daily departures and seats have declined 38 percent and 21 percent, respectively. As shown in **Table 9.2**, the average seats per flight grew from 31.5 in 2003 to 39.9 in 2018. The number of carriers increased from four (4) to five (5) and the number of destinations has increased from four (4) to seven (7).

Table 9.2 — Scheduled Air Service Summary, Nebraska Commercial Service Airports, Excluding OMA

	2003	2008	2013	2018
Average Daily Flight Departures	39.3	30.1	29.7	24.4
Average Daily Departing Seats	1,236	1,020	1,013	973
Average Seats Per Flight	31.5	33.9	34.1	39.9
Number of Carriers	4	5	5	5
Number of Destinations	4	6	6	7

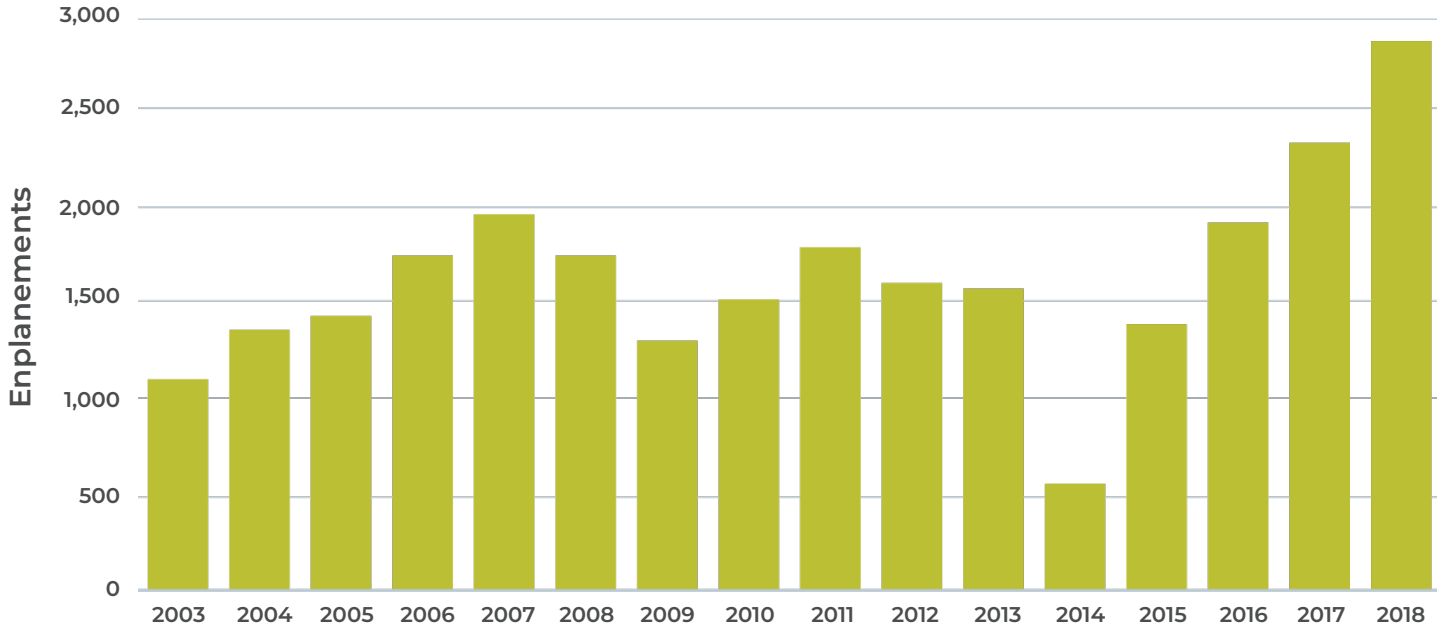
Source: Official Airline Guide

A brief summary of the historic service and passengers at each Nebraska airport is discussed on the following page.

Alliance Municipal Airport | AIA **|** Alliance

Alliance Municipal Airport is a part of the USDOT's EAS program and its service is subsidized. Over the last 15 years, enplaned passengers at Alliance Municipal Airport have grown, up 6.6 percent per year on average. Enplanements peaked in 2018 after several years of growth. This growth is attributed to the introduction of a new EAS carrier, Boutique Air, which began twice daily service to Denver in 2015. Enplanements peaked in 2018 with 2,870 passengers (see **Figure 9.5**).

Figure 9.5 — Historic Enplanements, Alliance Municipal Airport (2003-2018)



Source: Bureau of Transportation Statistics T-100 Market data

Denver Air Connection was selected to provide air service at Alliance using 9-seat Metroliner 23 aircraft, for the two-year period from June 1, 2019, through May 31, 2021, at an annual subsidy rate of $2,299,631. The airport receives 12 weekly nonstop round trips to Denver International Airport (DEN). Historically, the service provided to Denver initiated and ended in Chadron with a stop in Alliance, so the number of available seats was shared with the Chadron market. In 2019, different carriers were selected for Alliance and Chadron providing them each with nonstop service to Denver and the full number of seats available for each market.

Historic scheduled air service at Alliance Municipal Airport is presented in **Table 9.3**. Great Lakes Airlines served the community between 2003 and 2015. Great Lakes ended service to Denver due to financial and staffing problems associated with the FAA-imposed additional pilot training requirements and the subsequent industry-wide pilot shortage. Boutique Air took over the EAS contract in 2015 and provided service to Denver until May 31, 2019, when Denver Air Connection was selected as the EAS provider.

Table 9.3 — Air Service Summary, Alliance Municipal Airport (2003-2018)

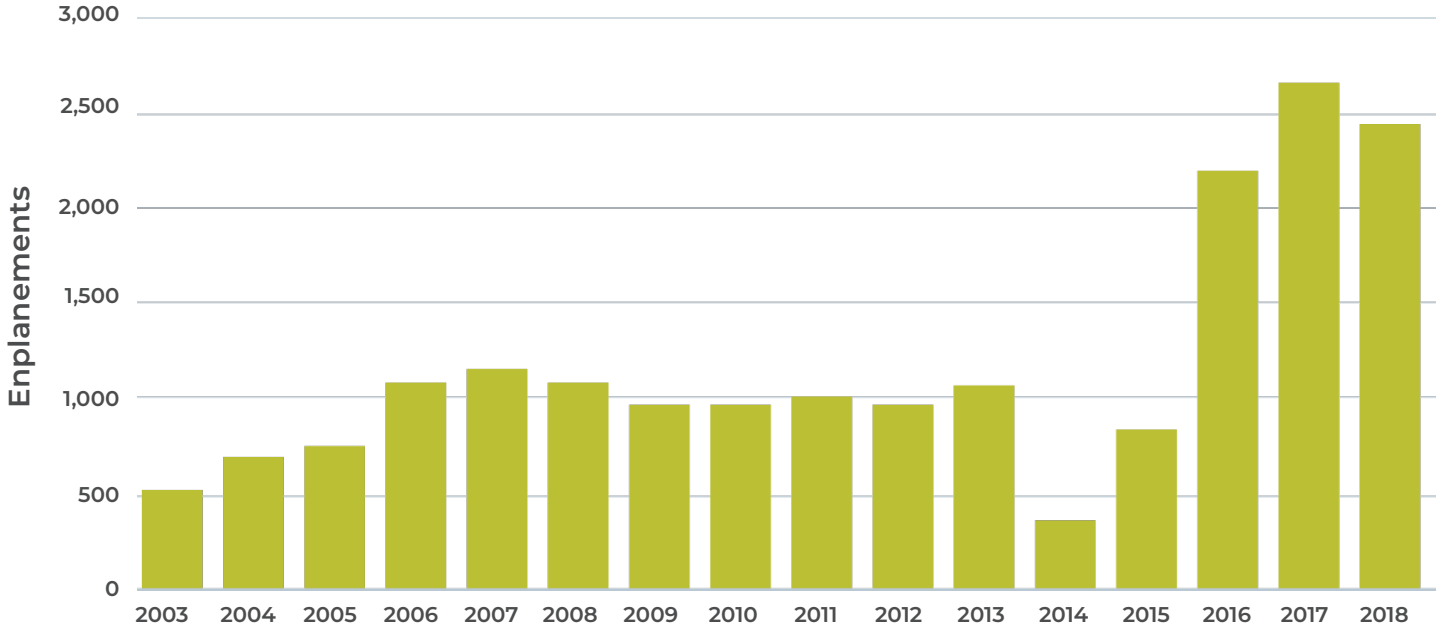
	2003	2008	2013	2018
Average Daily Flight Departures	1.9	1.7	1.6	1.9
Average Daily Departing Seats*	35.8	32.7	35.2	15.4
Average Seats Per Flight	19	19	19	8
Aircraft Type	B-1900	B-1900	B-1900	PC-12
Carrier	Great Lakes	Great Lakes	Great Lakes	Boutique Air
Destination	Denver	Denver	Denver	Denver
Subsidy Amount	$542,413	$748,635	$1,309,865	$2,273,850

Sources: Official Airline Guide, USDOT
***Note:** Service between Alliance Municipal and Denver initiated at Chadron Municipal; therefore, the departing seats were shared between the two airports.

Chadron Municipal Airport | CDR | Chadron

Historic enplanements at Chadron Municipal are presented in **Figure 9.6**. Service at Chadron Municipal is subsidized by the USDOT's EAS program. The flights between Chadron and Denver between 2003 and 2018 included a stop in Alliance and the seats were shared between the two markets. Enplanements grew at an average annual rate of 10.7 percent between 2003 and 2018 and they peaked in 2017 with 5,380 annual enplaned passengers. Boutique Air began serving the market in 2015 and enplanements have grown. Boutique has also added a regional maintenance hub at Chadron to ensure improved reliability.

Figure 9.6 — Historic Enplanements, Chadron Municipal Airport (2003-2018)



Source: Bureau of Transportation Statistics T-100 Market data

Table 9.4 presents the historic scheduled service and the EAS subsidies at Chadron Municipal Airport. The airport was served by Great Lakes Airlines between 2003 and 2015. Great Lakes utilized the 19-seat Beechcraft 1900 aircraft for service to Denver. Boutique Air

was chosen to provide the EAS service to Denver in 2015 and continues to serve the airport with an 8-seat Pilatus PC-12. In June 2019, the community reselected Boutique Air to provide the EAS contract for air service. However, this service is no longer shared with Alliance, who selected Denver Air Connection to serve their community. This has provided the community with additional departing seats and more flexibility to work with the airline on flight schedules.

Table 9.4 — Air Service Summary, Chadron Municipal Airport (2003-2018)

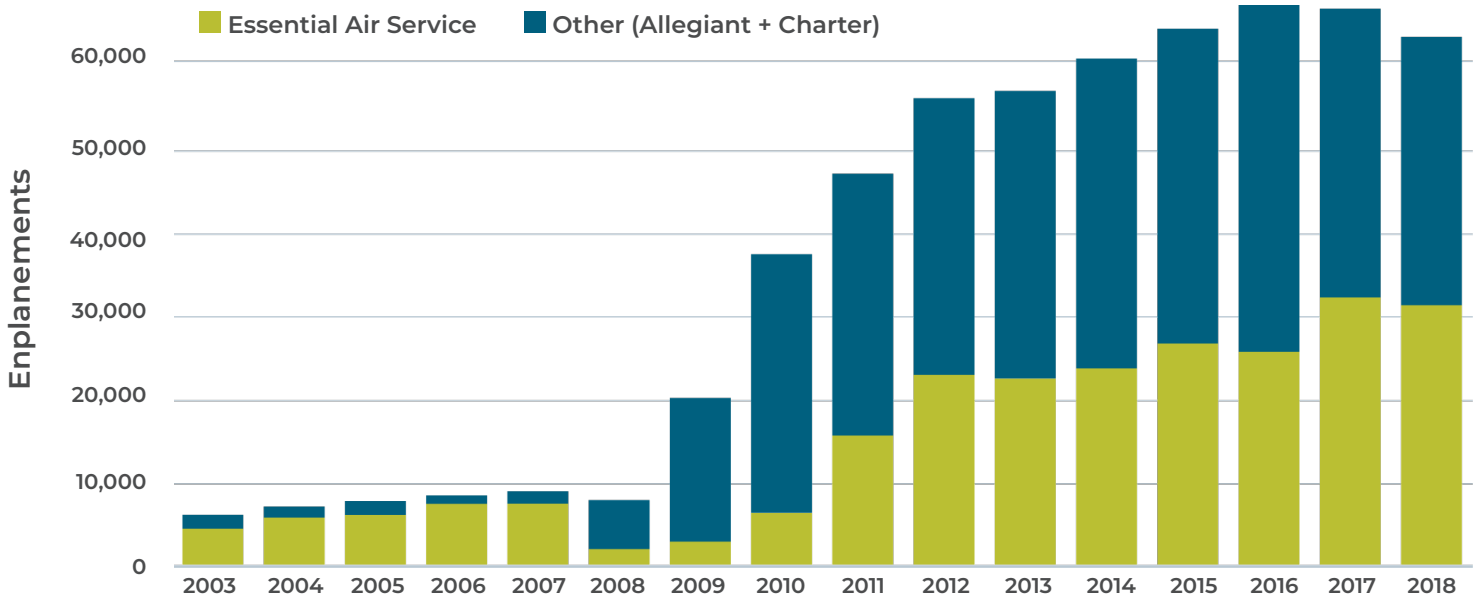
	2003	2008	2013	2018
Average Daily Flight Departures	1.9	1.7	1.8	1.9
Average Daily Departing Seats*	35.9	32.7	34.3	15.6
Average Seats Per Flight	19	19	19	8
Aircraft Type	B-1900	B-1900	B-1900	PC-12
Carrier	Great Lakes	Great Lakes	Great Lakes	Boutique Air
Destination	Denver	Denver	Denver	Denver
Subsidy Amount	$542,413	$748,635	$1,309,865	$2,273,850

Sources: Official Airline Guide, USDOT
***Note:** Service between Alliance Municipal and Denver initiated at Chadron Municipal; therefore, the departing seats were shared between the two airports.

Central Nebraska Regional Airport | GRI | Grand Island

As shown in **Figure 9.7**, enplanements at Central Nebraska Regional have grown dramatically over the last 15 years. Allegiant Airlines entered the market in 2009 providing twice weekly service between Grand Island and the leisure travel markets of Las Vegas and Phoenix. Improvements in the EAS service occurred as well since 2009. American Eagle was selected as the EAS carrier starting in 2011. The larger aircraft, improved reliability, and connectivity at American's Dallas hub has helped spur passenger growth. In 2018, enplanements reached 61,700 passengers.

Figure 9.7 — Historic Enplanements, Central Nebraska Regional Airport (2003-2018)



Source: Central Nebraska Regional Airport

Table 9.5 presents a summary of historic scheduled service at Central Nebraska Regional Airport. When the airport was served by Great Lakes Airlines (2003-2006 and 2009-2011) and US Airways Express carrier Air Midwest (2006-2008) enplanements remained below 10,000 per year. The influx of additional seats into the market due to the entrance of MD-80 service by Allegiant (2009) and regional jet service by American Eagle (2011) has spurred an increase in passenger enplanements. In 2018, the annual EAS subsidy dropped below $1 million due to the success of the American Eagle service.

Table 9.5 — Air Service Summary, Central Nebraska Regional Airport (2003-2018)

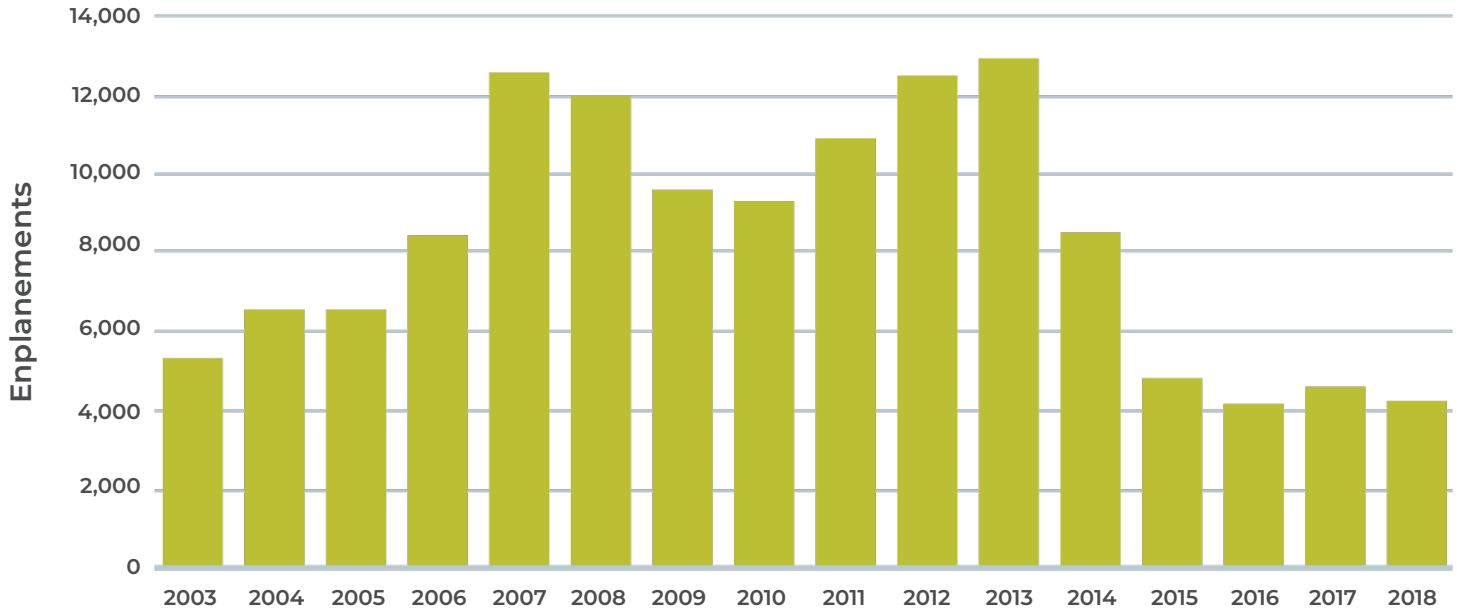
	2003	2008	2013	2018
Essential Air Service				
Average Daily Flight Departures	2.4	2.0	1.9	2.1
Average Daily Departing Seats	45.2	37.9	81.6	115.7
Average Seats Per Flight	19	19	44	54
Aircraft Type	B-1900	B-1900	ERJ-140	ERJ-145
EAS Carrier	Great Lakes	Air Midwest (US)	American Eagle	American Eagle
EAS Destination	Denver	Kansas City	Dallas	Dallas
EAS Subsidy Amount	$1,198,396	$2,271,640	$1,837,021	$907,348
Other Scheduled Service				
Average Daily Flight Departures	-	-	0.6	0.6
Average Daily Departing Seats	-	-	103.7	99.2
Average Seats Per Flight	-	-	166	164
Aircraft Type	-	-	MD-80	MD-80
Carrier	-	-	Allegiant	Allegiant
Destination	-	-	Las Vegas Phoenix Gateway	Las Vegas Phoenix Gateway

Source: Official Airline Guide, USDOT

Kearney Regional Airport | EAR | Kearney

Enplanements at Kearney Regional have fluctuated over the last 15 years as shown in **Figure 9.8**. The airport is served under the USDOT's EAS program. Enplanements peaked in 2013 with nearly 13,000 passengers. The drop in enplanements in 2014 and subsequent years can be attributed to the struggles encountered by Great Lakes Airlines due to the pilot shortage and the cancellations and flight delays that accompanied the shortage. PenAir took over the EAS contract in 2016 but declared Chapter 11 bankruptcy in 2017. After one year of no service (September 2017 to September 2018), United Express carrier, SkyWest, began flying under the EAS contract at Kearney.

Figure 9.8 — Historic Enplanements, Kearney Regional Airport (2003-2018)



Sources: Bureau of Transportation Statistics T-100 Market data
Note: SkyWest began service on September 5, 2018. The airport underwent a major runway rehabilitation in early 2018 and did not have air service from September 2017-September 2018.

As shown in **Table 9.6,** Great Lakes Airlines provided historic air service at Kearney Regional with three daily departures to Denver on the 19-seat Beechcraft 1900 aircraft. PenAir was chosen to take over the route in 2016 using Saab 340 aircraft after Great Lakes was plagued by the pilot shortage and reliability issues. PenAir was also impacted by the pilot shortage and left the market in 2017 after declaring bankruptcy. United Express carrier SkyWest began 12 weekly flights at Kearney Regional in September 2018 using 50-seat CRJ-200. The EAS subsidy for SkyWest is double the subsidy five years earlier in 2013.

Table 9.6 — Air Service Summary, Kearney Regional Airport (2003-2018)

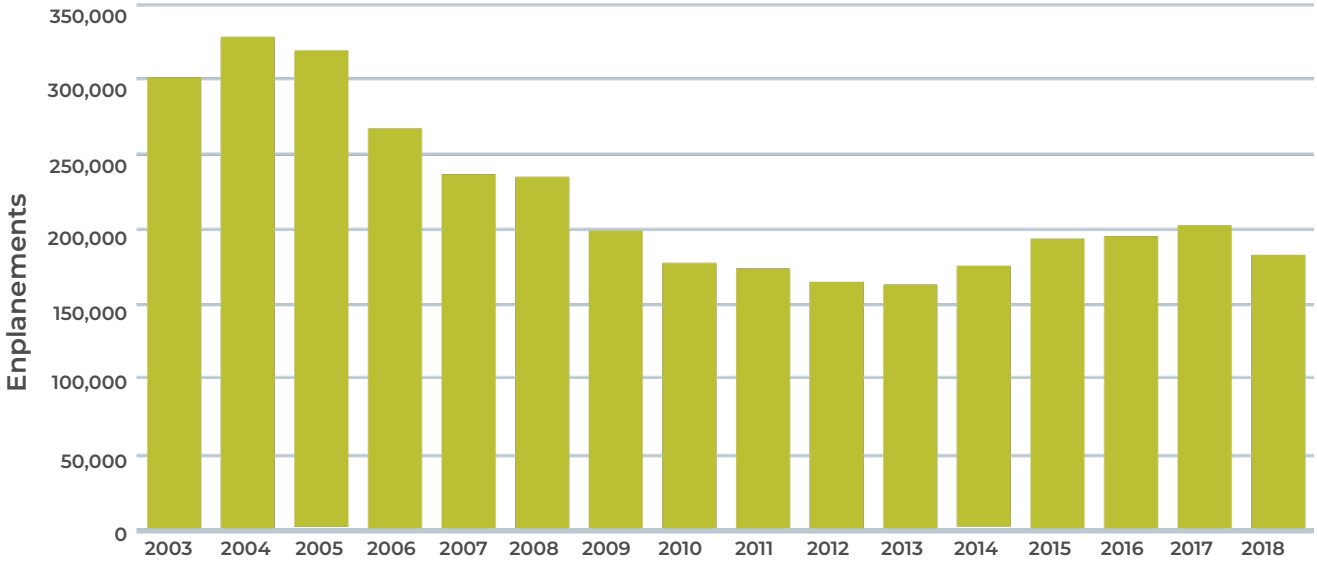
	2003	2008	2013	2018
Average Daily Flight Departures	2.7	2.7	3.0	1.7
Average Daily Departing Seats	51.2	51.1	56.7	85.7
Average Seats Per Flight	19	19	19	50
Aircraft Type	B-1900	B-1900	B-1900	CRJ-200
Carrier	Great Lakes	Great Lakes	Great Lakes	SkyWest (UA)
Destination	Denver	Denver	Denver	Denver
Subsidy Amount	$839,487	$1,978,386	$1,752,904	$3,675,276

Sources: Official Airline Guide, USDOT
***Note:** SkyWest began service on September 5, 2018. The airport underwent a major runway rehabilitation in early 2018 and did not have air service from September 2017-September 2018.

Lincoln Airport | LNK | Lincoln

Lincoln Airport enplanements have fallen over the last 15 years, as shown in **Figure 9.9**. Enplanements peaked in 2004 with over 327,000. Lincoln was impacted by the airline mergers in the mid-2000s, the economics of flying the 50-seat regional jet aircraft, and the economic downturn that occurred in 2008. Enplanements at Lincoln have not recovered to the early-2000 levels. Small and mid-sized markets around the country have not recovered as airlines changed their operating models and capacity increases are much more conservative. Between 2003 and 2018, enplanements at Lincoln Airport dropped 3.2 percent per year on average.

Figure 9.9 — Historic Enplanements, Lincoln Airport (2003-2018)



Source: Bureau of Transportation Statistics T-100 Market data

The number of average scheduled daily departures at Lincoln Airport has declined from 17 in 2003 to 9 in 2018. As shown in **Table 9.7**, seat capacity has also seen a declined from 821 daily departing seats available to 505 departing seats. In 2003, Lincoln had service to five airline hubs. By 2013 only Delta and United's regional partners served the market. In 2018, Delta added service to its hub in Atlanta, bringing the number of nonstop destination hub airports to four.

Table 9.7 — Air Service Summary, Lincoln Airport (2003-2018)

	2003	2008	2013	2018
Average Daily Flight Departures	17.4	12.2	8.9	9.4
Average Daily Scheduled Departing Seats	820.8	649.7	452.0	505.0
Average Seats Per Flight	47.2	53.3	50.5	53.9
Destination (Carrier)	STL (AA)	LAS (Allegiant)	MSP (DL)	ATL (DL)
	ORD (AA)	DTW (NW)	ORD (UA)	MSP (DL)
	MSP (NW)	MSP (NW)	DEN (UA)	ORD (UA)
	ORD (UA)	ORD (UA)	-	DEN (UA)
	DEN (UA)	DEN (UA)	-	-

Sources: Official Airline Guide, USDOT

McCook Ben Nelson Regional Airport | MCK | McCook

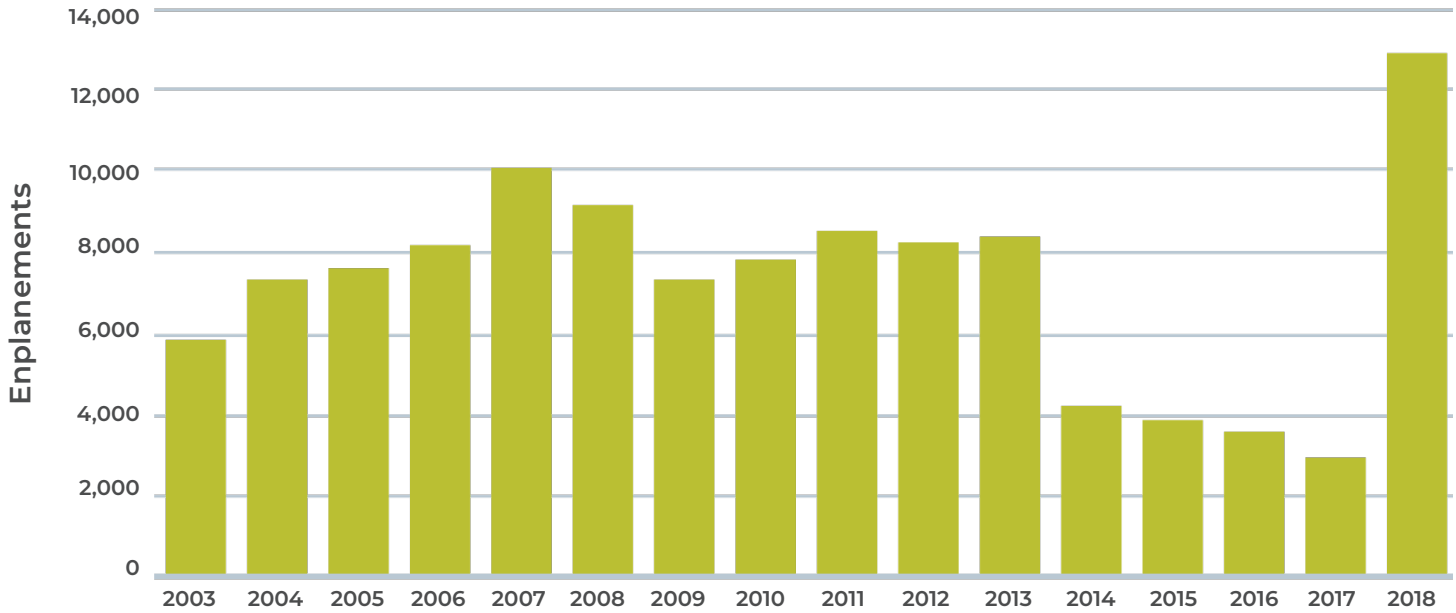
The scheduled airline service to McCook is provided by Boutique Air. Due to the nature of the service, FAA records for McCook are not collected in the same fashion. The change to Boutique Air was intended to stabilize the scheduled service at McCook. Flights are offered to Denver.

An increase in airline passengers was seen in 2016 compared to the prior year, at 389 percent. Total number of passengers by the end of the year in 2016 was 1,627, compared to 333 in 2015. The increase leveled off in 2017, with 2,703 total passengers, a 66 percent increase.

North Platte Regional Airport | LBF | North Platte

North Platte Regional enplanements fluctuated slightly between 2003 and 2013 when Great Lakes Airlines served the market (see **Figure 9.10**). Enplanements fell 2014 through 2017 as Great Lakes and PenAir both faced operational difficulties due to the nationwide pilot shortage. In February 2018, United Express carrier SkyWest began serving the market with a larger CRJ 200 50-seat and annual enplanements reached over 13,000, the highest levels over the last 15 years.

Figure 9.10 — Historic Enplanements, North Platte Regional Airport (2003-2018)



Source: Bureau of Transportation Statistics T-100 Market data

Table 9.8 presents a historic scheduled service summary at North Platte Regional Airport. Great Lakes Airlines served the market with 18 weekly flights on 19-seat Beech 1900 aircraft from 2003 and 2013. Great Lakes and other small airlines were greatly impacted by the pilot shortage and the community's air service suffered. SkyWest was chosen to provide EAS service at North Platte in 2018. Although providing fewer flights, more seats are offered by utilizing the larger 50-seat aircraft. EAS subsidies reached an all-time high of nearly $3.2 million per year in 2018.

Table 9.8 — Air Service Summary, North Platte Regional Airport (2003-2018)

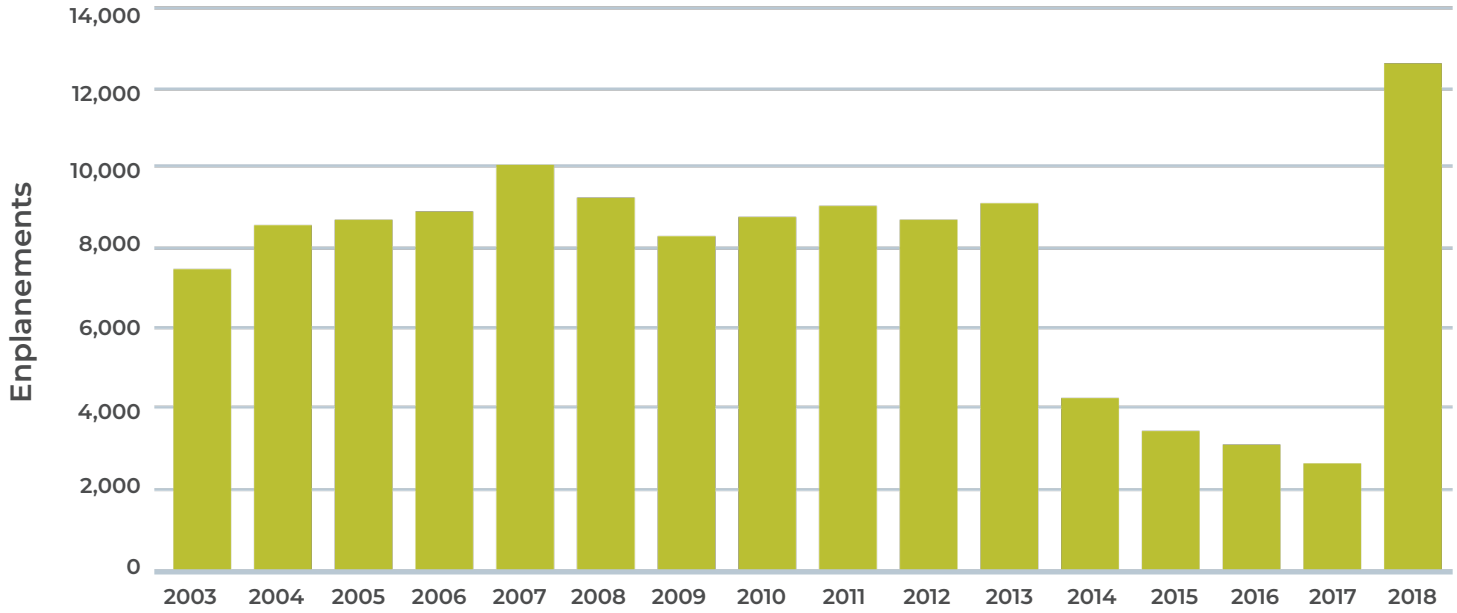
	2003	2008	2013	2018
Average Daily Flight Departures	2.7	2.8	2.4	1.6
Average Daily Departing Seats	51.1	56.0	46.0	78.1
Average Seats Per Flight	19	19	19	50
Aircraft Type	Beech 1900	Beech 1900	Beech 1900	CRJ-200
EAS Carrier	Great Lakes	Great Lakes	Great Lakes	SkyWest (UA)
EAS Destination	Denver	Denver	Denver	Denver
EAS Subsidy Amount	$494,887	$1,535,085	$1,398,351	$3,152,294

Sources: Official Airline Guide, USDOT

Western Nebraska Regional Airport | BFF | Scottsbluff

Western Nebraska Regional Airport's air service is subsidized under the EAS program. As shown in **Figure 9.11**, between 2003 and 2013, enplanements at Western Nebraska remained relatively unchanged under the service provided by Great Lakes Airlines. After several years of being plagued by the pilot shortage and unreliability, Great Lakes exited the market in November 2016. PenAir took over the route between Scottsbluff and Denver but they too were impacted by financial difficulties and pulled out of the market in September 2017. United Express carrier SkyWest began serving the market with the larger 50-seat CRJ-200 in January 2018. 2018 enplanements reached 12,628, the highest levels over the last 15 years with the introduction of SkyWest service to Denver. Between 2003 and 2018, enplanements at Western Nebraska Regional grew at an average annual rate of 3.6 percent.

Figure 9.11 — Historic Enplanements, Western Nebraska Regional Airport (2003-2018)



Source: Bureau of Transportation Statistics T-100 Market data

As discussed above, Western Nebraska Regional has had several service changes over the last five years. **Table 9.9** presents the scheduled flight, seats, and subsidies over since 2003.

The current SkyWest service has provided the Scottsbluff community with reliability and improved connection capability at Denver. The EAS subsidy has also grown drastically over the last 15 year, doubling between 2003 and 2008 and doubling again between 2013 and 2018.

Table 9.9 — Air Service Summary, Western Nebraska Regional Airport (2003-2018)

	2003	2008	2013	2018
Average Daily Flight Departures	2.6	2.9	3.6	1.6
Average Daily Departing Seats	48.6	61.8	67.5	78.5
Average Seats Per Flight	19	19	19	50
Aircraft Type	B-1900	B-1900	B-1900	CRJ-200
Carrier	Great Lakes	Great Lakes	Great Lakes	SkyWest (UA)
Destination	Denver	Denver	Denver	Denver
Subsidy Amount	$751,373	$1,535,085	$1,398,351	$3,152,294

Sources: Official Airline Guide, USDOT

9.6 Summary

The regional airline industry has changed dramatically over the last 15 years and Nebraska's airports have been impacted by the pilot shortage, the limited number of carriers, and changes to the EAS program. These realities coupled with the size of the markets and existing travel patterns of local air travelers, limit opportunities for improvements to Nebraska airports. Several of Nebraska's airports have seen improved service in the last several years but this success has come by way of significant effort by the community and/or larger airline subsidies. These airports are hopeful that improved connectivity and reliability will spur additional enplanements and will result in a stronger economic base for the communities.

10. Business/Industry Reliance on Aviation

Off-airport business reliance is not ordinarily captured in aviation economic impact studies, however businesses not explicitly related to aviation rely on airports for access to markets and industries. At present, there is no standardized method of selecting businesses that should participate or industries that should be surveyed to determine reliance. The evaluation of business/industry reliance as an economic impact category is more qualitative than quantitative.

An economic impact study that addresses business/industry reliance can take multiple approaches. A survey could be sent to specific industries identified by the airports or state. This method was employed in the *2018 Florida Economic Impact Study*. Another method would be surveying thousands of businesses across a state or region and hoping for a sufficient response rate, generalizing survey results across the targeted economy, and/or making assumptions regarding air-reliant industries using third party databases. A modification of this approach was applied.

To be conservative and not overstate the contributions of Nebraska's public-use airports to the state economy, this survey acquired responses from a third-party survey vendor based on self-selecting, self-identifying factors. The online, tiered survey segregates users based on initial responses. To complete the five-question survey, the user was identified as a person of authority with the title of manager, director, officer or president within a business organization and conducted business in Nebraska or their primary place of business is Nebraska. The respondents selected their business industry from a drop-down list. The options in the list were Agriculture, Energy, Finance, Health Care, Information Technology, Manufacturing, Wholesale, or Other.

Seventy-five percent of the responses were generated from individuals whose primary place of business was not Nebraska, but conducted business in Nebraska. The distribution of the responses by industry are provided in **Table 10.1**.

Analysis of the responses is presented starting on page 63. While presented in a quantitative format, this data is actually qualitative in nature. Without a global shut down of air travel, a calculation of business impact is speculative, at best.

Table 10.1 — Response by Location and Industry

Industry	Nebraska	Outside of Nebraska
Agriculture	9	51
Energy	36	204
Finance	20	140
Health Care	27	102
Information Technology	49	357
Manufacturing	3	114
Wholesale	48	182
Other	23	125

Question A. (Nebraska Respondents) Do any of your clients or vendors use commercial airline transportation to visit your local business site?

Figure 10.1 — Response by Industry - Air Usage

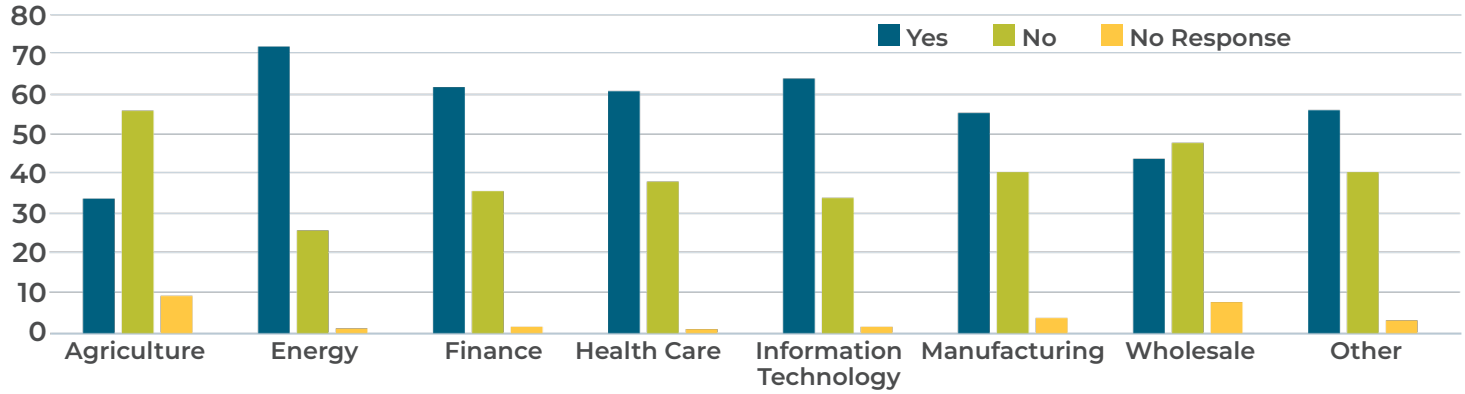


Table 10.2 — Response by Industry - Air Usage

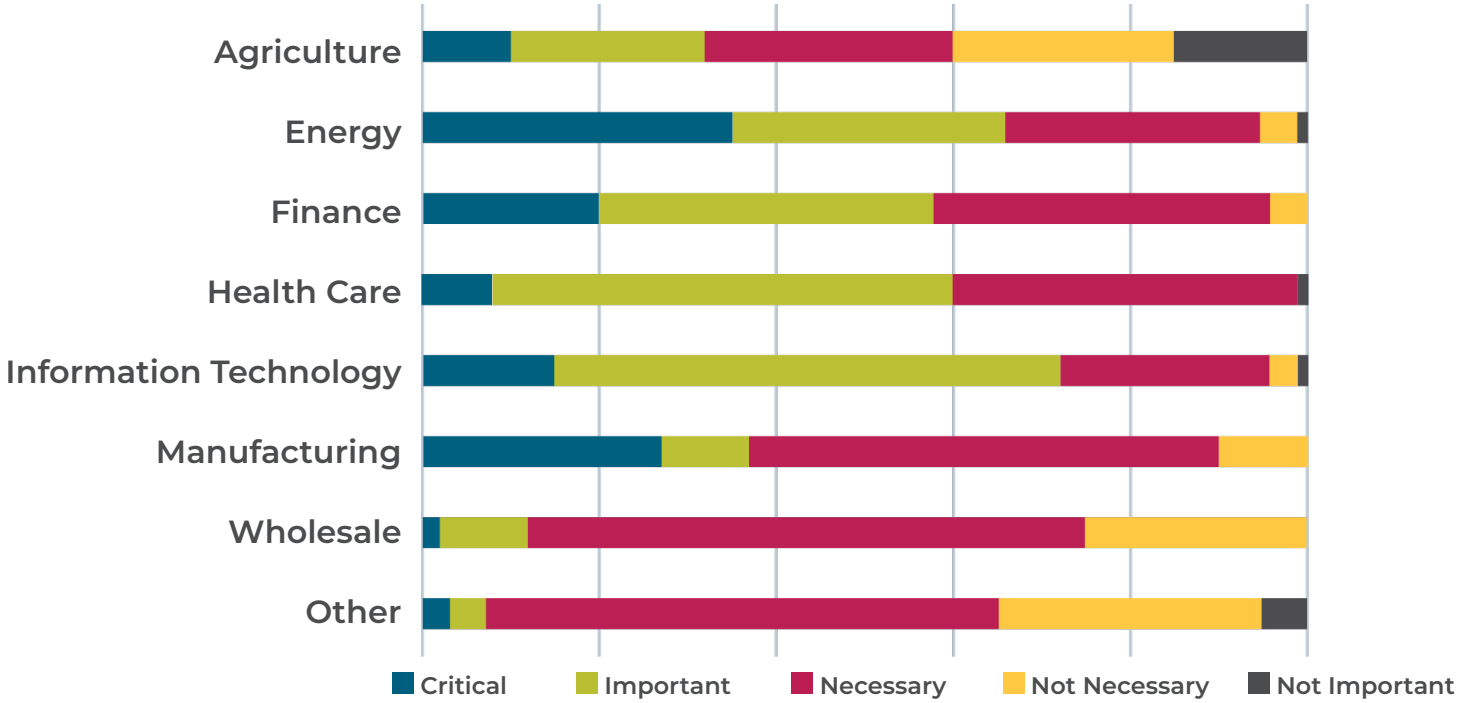
Response by Industry (%)	Yes	No	NR
Agriculture	33	56	11
Energy	72	25	3
Finance	60	35	5
Health Care	59	30	1
Information Technology	63	37	4
Manufacturing	67	33	0
Wholesale	44	50	6
Other	57	39	4

Question B. (Both Nebraska and Outside Nebraska Respondents) Air Travel is _____ to conducting business in Nebraska. (Respondents were given five options: Critical, Important, Necessary, Not Necessary, Not Important)

Table 10.3 — Importance of Air Travel by Industry Sector

Response by Industry	Critical	Important	Necessary	Not Necessary	Not Important
Agriculture	10	22	28	25	15
Energy	35	31	29	4	1
Finance	20	38	38	4	-
Health Care	8	52	39	0	1
Information Technology	15	57	24	3	1
Manufacturing	27	10	53	10	0
Wholesale	2	10	63	25	-
Other	3	4	58	30	5

Figure 10.2 — Importance of Air Travel by Industry Sector



Question C. (Outside Nebraska Respondents) How many client trips do you or your staff take to Nebraska per year?

Table 10.4 — Average Client Trips Response by Industry

Industry	Average
Agriculture	5
Energy	25
Finance	23
Health Care	15
Information Technology	18
Manufacturing	7
Wholesale	6
Other	22
Overall Average	**15.125**

Question D. (Nebraska Respondents) How many client visits does your business receive per year?

Table 10.5 — Average Annual Visits by Industry

Industry	Average
Agriculture	1
Energy	8
Finance	6
Health Care	3
Information Technology	4
Manufacturing	2
Wholesale	3
Other	3
Overall Average	**3.75**

Question E. (Both Nebraska and Outside Nebraska Respondents) What percentage of your business relies on air travel or would be reduced if air travel was not an option?

Table 10.6 — Business Reduction Without Air Travel

Industry	Average
Agriculture	8%
Energy	33%
Finance	36%
Healthcare	21%
Information Technology	28%
Manufacturing	32%
Wholesale	12%
Other	22%

Note: Responses to Question E imply that without air travel overall business would be reduced in the State by 8 to 36 percent.

Question F. (Both Nebraska and Outside Nebraska Respondents)

Does your business use general aviation (private, business-owned, charter, or non-scheduled aircraft) as an air travel option? (Yes/No Response)

Figure 10.3 — General Aviation Travel Usage by Industry

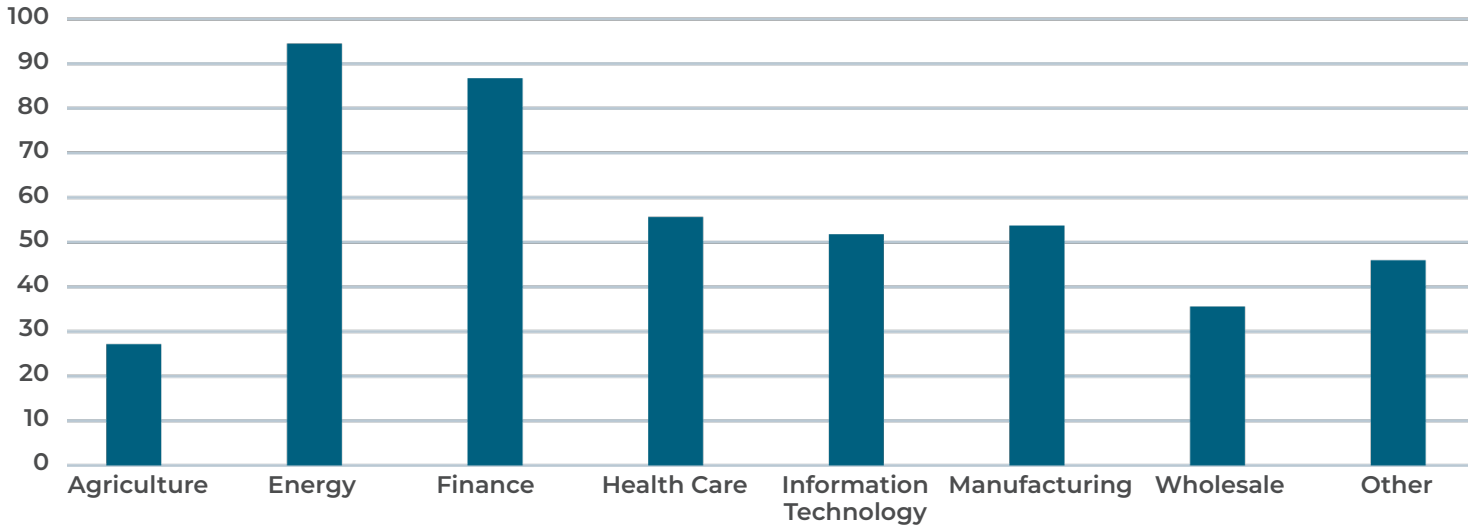


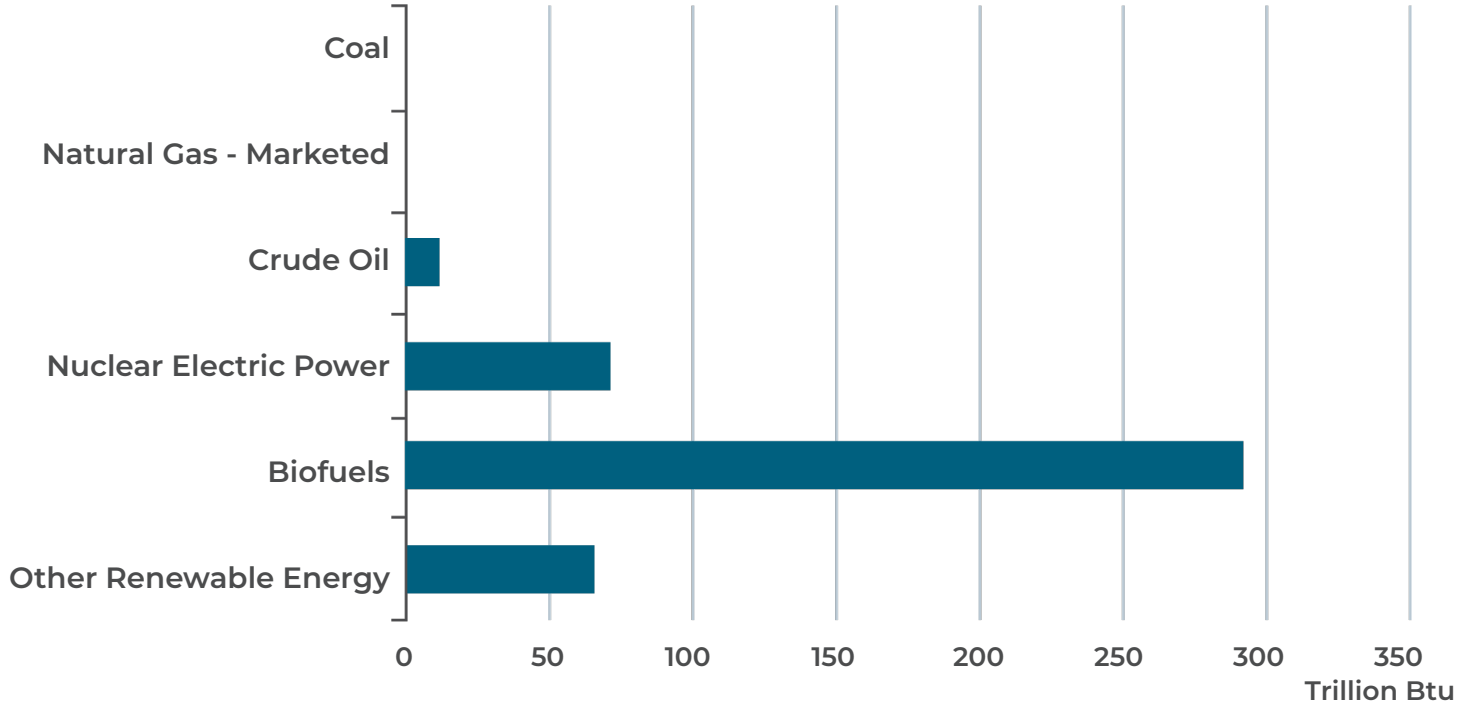
Table 10.7 — General Aviation Travel Usage by Industry

Industry	Average
Agriculture	27%
Energy	82%
Finance	71%
Health Care	56%
Information Technology	52%
Manufacturing	54%
Wholesale	36%
Other	46%

10.1 Application of Survey Results, Energy Sector

According to the US Energy Information Center, Nebraska produces about 13 percent of the nation's fuel ethanol and ranks second in the nation, after Iowa, in ethanol production and capacity. Nebraska is among the top ten states in per capita total energy consumption, in part because of its energy-intensive industrial sector, led by agriculture and food processing, and because of the state's hot summers and harsh winters. Nebraska has the third-highest number of industrial electricity customers of any state, and a significant share of Nebraska's industrial consumption is seasonal demand from farms where electricity is used to run irrigation systems.

Figure 10.4 — Nebraska Energy Production Estimates 2017



As of 2017, Nebraska's ethanol production capacity was 2.558 billion gallons per year, with 1,453 full-time employees at 24 facilities. This represents an increase of 481 million gallons annually and an additional 152 full-time employees compared to 2014. In 2017, ethanol averaged approximately $1.55 per gallon or $746 million in total fuel produced. *Nebraska Ethanol Board, February 2019*.

According to the Nebraska Power Alliance's *Nebraska Wind Energy Investment Report*, the total economic impact of wind energy was $835 million in 2018. This is an increase of six times the impact in 2009, although the estimated impact in 2019 leveled off at $243 million.

The survey results indicate a strong reliance on air travel in both of the expanding energy production fields. This reliance is likely based on the need for outside expertise during the capital investment phase and growth phases of the industry. Based on the $1.5 billion economic impact of the energy industry and the estimated 33 percent predicted lost revenue from the survey, the availability of air travel may contribute an additional $495 million in economic activity in the state.

Eighty-two percent of the survey respondents who identified themselves as members of the energy sector indicated that their business used general aviation to achieve business objectives.

10.2 Application of Survey Results, Finance Sector

Finance, insurance, and real estate accounted for roughly $22.5 billion impact to the state of Nebraska, or about 19 percent of Nebraska's total economic impact according to the Nebraska Chamber of Commerce and Industry's 2018 State Chamber magazine. The finance and insurance sectors employed 53,800 workers. First National of Nebraska and Mutual of Omaha started business in Nebraska in 1857 and 1909, respectively. The financial sector's deep roots in the state are complemented by UBS and Ford Motor Credit Company, who have significant operations in the state. Both TD Ameritrade and Berkshire Hathaway are headquartered in Omaha. The state also houses several regional banks, including Pinnacle Bank and the First National Bank of Omaha. First Data, a large financial transaction processing organization, maintains a facility in Omaha, as well.

Ninety-six percent of the survey respondents, who identified themselves as part of the financial industry, indicated that available air travel was critical (28 percent), important (38 percent) or necessary (38 percent) to conduct business in Nebraska.

11. Drones

In 2015, the Association for Unmanned Vehicle Systems International (AUVSI) commissioned a study that attempted to predict the economic potential of drones in the United States. **Table 11.1** shows data taken from the study. The New Yorker Magazine turned that study into an interactive/infographic located at https://projects.newyorker.com/story/drones/.

Table 11.1 — Economic Impact of Drones in Nebraska 2015-2025

Year	Direct Employment	Total Employment	Total Direct Spending ($M)	Total Economic Impact ($M)	Total State Taxes ($K)	% Change over Previous Year
2015	22	43	$2.23	$4.14	$35.91	-
2016	44	85	$4.46	$8.29	$71.82	100%
2017	66	128	$6.68	$12.43	$107.73	50%
2018	69	134	$7.02	$13.05	$113.11	5%
2019	73	141	$7.37	$13.70	$118.77	5%
2020	76	148	$7.74	$14.39	$124.71	5%
2021	80	155	$8.12	$15.11	$130.84	5%
2022	84	163	$8.53	$15.88	$137.49	5%
2023	88	171	$8.96	$16.66	$144.37	5%
2024	93	180	$9.40	$17.49	$151.58	5%
2025	97	189	$9.87	$18.37	$159.18	5%

Figure 11.1 — Estimated Nebraska Annual Employment of Drones

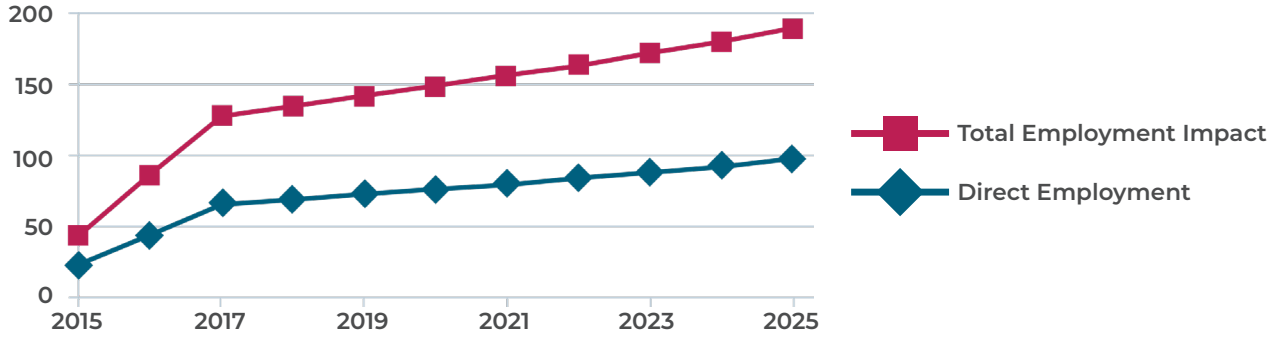
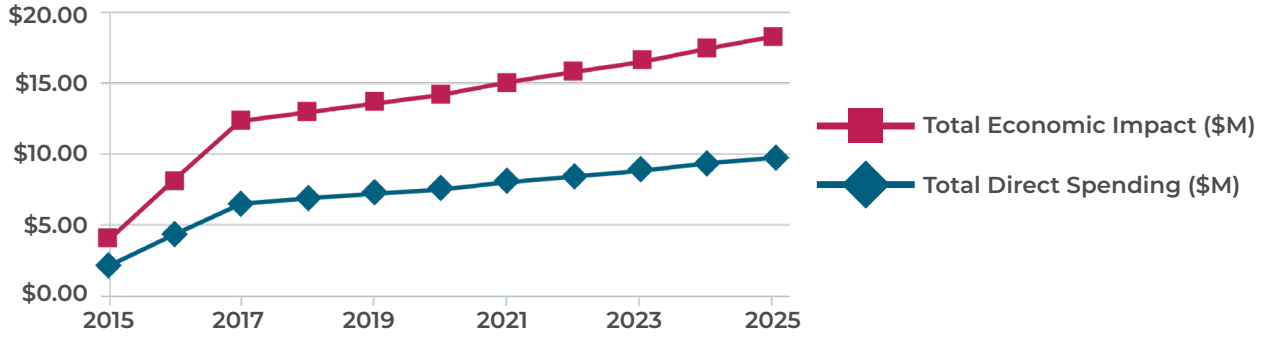


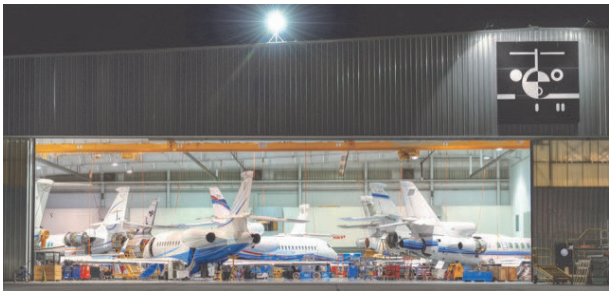
Figure 11.2 — Estimated Nebraska Spending and Economic Impact of Drones



Innovators in the Nebraska drone industry seized on this nascent industry. In 2015, a multi-disciplinary team from the University of Nebraska, Lincoln with experts in drone technology, fire ecology, conservation and public policy started investigating the possibilities of using drones to battle wildfires and then also to help prevent them. The drone has the ability to ignite and monitor fires in rugged, remote areas that are difficult to reach, even with all-terrain vehicles. While federal agencies use helicopters in remote areas, it's too costly to use them on private lands. Prescribed burn tests have shown potential for fire-fighting drones. The University of Nebraska, Lincoln's Nebraska Intelligent Mobile Unmanned Systems or NIMBUS is building aerial robots small enough to fit in a firefighter's backpack but are able to safely interact with the environment. In 2019, a Lincoln UAS company received a $500,000 investment in its firefighting drone.

Figure 11.3 — Drone Burn Program

Source: University of Nebraska, Lincoln's Nebraska Intelligent Mobile Unmanned Systems Laboratory, Homestead National Monument Launched a Prescribed Burn Program with a Drone. (Courtesy: National Park Service)



Appendix A

Studied Airports

Associated City	Code	Visited (Yes = Visited)	Direct	+ Spin-Off	= Total Economic Impact
Ainsworth	ANW	Yes	$1,661,000	$1,126,000	$2,787,000
Albion	BVN	No	$594,000	$506,000	$1,099,000
Alliance	AIA	Yes	$11,877,000	$8,863,000	$20,740,000
Alma	4D9	Yes	$1,459,000	$1,072,000	$2,530,000
Arapahoe	37V	No	$404,000	$254,000	$657,000
Atkinson	8V2	No	$828,000	$635,000	$1,463,000
Auburn	K01	No	$1,144,000	$869,000	$2,013,000
Aurora	AUH	Yes	$4,025,000	$3,071,000	$7,096,000
Bassett	RBE	No	$477,000	$358,000	$835,000
Beatrice	BIE	Yes	$6,074,000	$4,344,000	$10,418,000
Blair	BTA	Yes	$3,172,000	$2,522,000	$5,694,000
Bloomfield	84Y	Yes	$655,000	$528,000	$1,183,000
Broken Bow	BBW	Yes	$1,845,000	$1,461,000	$3,305,000
Burwell	BUB	No	$1,299,000	$1,050,000	$2,348,000
Cambridge	CSB	Yes	$1,825,000	$1,492,000	$3,316,000
Central City	07K	Yes	$1,721,000	$1,332,000	$3,053,000
Chadron	CDR	Yes	$12,068,000	$9,569,000	$21,636,000
Chappell	CNP	No	$267,000	$226,000	$493,000
Columbus	OLU	No	$9,057,000	$5,636,000	$14,693,000
Cozad	CZD	Yes	$4,586,000	$3,641,000	$8,226,000
Creighton	6K3	No	$596,000	$471,000	$1,066,000
Crete	CEK	Yes	$9,226,000	$7,412,000	$16,637,000
Curtis	47V	Yes	$401,000	$307,000	$708,000
David City	93Y	Yes	$9,895,000	$5,199,000	$15,094,000
Fairbury	FBY	No	$3,146,000	$2,260,000	$5,406,000
Fairmont	FMZ	No	$1,374,000	$1,014,000	$2,388,000
Falls City	FNB	Yes	$1,042,000	$839,000	$1,881,000
Fremont	FET	Yes	$5,972,000	$4,571,000	$10,542,000
Genoa	97Y	No	$135,000	$114,000	$248,000
Gordon	GRN	No	$1,372,000	$1,065,000	$2,436,000
Gothenburg	GTE	No	$507,000	$413,000	$919,000
Grand Island	GRI	Yes	$95,970,000	$75,799,000	$171,769,000
Grant	GGF	Yes	$3,488,000	$2,812,000	$6,299,000
Hartington	0B4	Yes	$1,851,000	$1,297,000	$3,148,000

Associated City	Code	Visited (Yes = Visited)	Direct	+ Spin-Off	= Total Economic Impact
Harvard	08K	No	$658,000	$477,000	$1,134,000
Hastings	HIS	Yes	$5,876,000	$4,634,000	$10,509,000
Hay Springs	4V6	No	$213,000	$183,000	$396,000
Hebron	HJH	No	$1,518,000	$1,263,000	$2,781,000
Holdrege	HDE	No	$4,578,000	$3,667,000	$8,245,000
Hyannis	1V2	No	$820,000	$508,000	$1,327,000
Imperial	IML	Yes	$4,901,000	$3,813,000	$8,713,000
Kearney	EAR	Yes	$25,080,000	$19,472,000	$44,552,000
Kimball	IBM	Yes	$1,002,000	$811,000	$1,813,000
Lexington	LXN	Yes	$3,369,000	$2,687,000	$6,056,000
Lincoln	LNK	Yes	$753,404,000	$620,101,000	$1,373,504,000
Loup City	0F4	No	$913,000	$717,000	$1,630,000
McCook	MCK	Yes	$11,960,000	$9,611,000	$21,570,000
Minden	0V3	Yes	$994,000	$722,000	$1,715,000
Nebraska City	AFK	Yes	$2,396,000	$1,899,000	$4,294,000
Neligh	4V9	No	$3,657,000	$2,809,000	$6,466,000
Norfolk	OFK	Yes	$8,534,000	$5,036,000	$13,570,000
North Omaha	3NO	Yes	$3,362,000	$2,189,000	$5,551,000
North Platte	LBF	Yes	$93,932,000	$61,029,000	$154,961,000
Ogallala	OGA	Yes	$2,203,000	$1,727,000	$3,930,000
Omaha	MLE	Yes	$42,862,000	$34,615,000	$77,476,000
Omaha	OMA	No	$2,377,096,000	$1,915,015,000	$4,292,110,000
O'Neill	ONL	Yes	$2,378,000	$1,847,000	$4,224,000
Ord	ODX	Yes	$1,141,000	$863,000	$2,004,000
Oshkosh	OKS	No	$491,000	$379,000	$869,000
Pawnee City	50K	No	$426,000	$350,000	$776,000
Pender	0C4	No	$1,138,000	$827,000	$1,964,000
Plattsmouth	PMV	Yes	$4,746,000	$3,725,000	$8,471,000
Red Cloud	7V7	Yes	$667,000	$521,000	$1,187,000
Rushville	9V5	No	$767,000	$653,000	$1,420,000
Sargent	09K	No	$1,467,000	$1,071,000	$2,537,000
Scottsbluff	BFF	Yes	$47,936,000	$38,433,000	$86,368,000

Associated City	Code	Visited (Yes = Visited)	Direct	+ Spin-Off	= Total Economic Impact
Scribner	SCB	No	$1,332,000	$1,004,000	$2,336,000
Seward	SWT	Yes	$4,407,000	$3,417,000	$7,823,000
Sidney	SNY	Yes	$1,654,000	$1,258,000	$2,911,000
South Sioux City	7K8	Yes	$1,095,000	$819,000	$1,913,000
Superior	12K	Yes	$2,129,000	$1,594,000	$3,723,000
Tecumseh	0G3	No	$637,000	$498,000	$1,135,000
Tekamah	TQE	Yes	$4,292,000	$3,317,000	$7,608,000
Thedford	TIF	Yes	$787,000	$555,000	$1,342,000
Valentine	VTN	Yes	$2,825,000	$2,220,000	$5,044,000
Wahoo	AHQ	Yes	$5,323,000	$3,752,000	$9,075,000
Wallace	64V	Yes	$553,000	$442,000	$995,000
Wayne	LCG	Yes	$2,212,000	$1,698,000	$3,910,000
York	JYR	Yes	$2,105,000	$1,685,000	$3,789,000
		Totals	$3,640,000,000	$2,917,000,000	$6,556,000,000

Note: Values on each line of the table are rounded to the nearest $1,000. Total is rounded to the nearest $1 million and may not exactly match the sum of individual lines.

Appendix B

Individual Airport Brochures

Study Methodology

The Nebraska Aviation Counts! team conducted the Study using guidelines set by the Federal Aviation Administration (FAA). Primary data was gathered by surveying airport managers, airport tenants, and visitors who traveled to Nebraska by commercial service or general aviation aircraft. While primary data is the core of the analysis, missing values and industry-specific information was calculated using secondary data sources.

The primary and secondary data collected for Nebraska airports provided the direct impacts driving the economic modeling effort for this study. The Impact Analysis for Planning (IMPLAN) modeling system was used to calculate aviation's total impact to the Nebraska economy.

Impact Types

Direct Impacts

Related to the provisions of aviation services, visitors' spending, or the activity of aviation-reliant businesses.

Indirect Impacts

Any portion of direct business revenue from affected businesses used to purchase goods or services within the state.

Spin-Off

Induced Impacts

Any portion of direct or indirect revenues paid to on-airport workers and spent on goods and services within the state.

Total Economic Impacts

The total sum of both direct impacts and spin-off effects generated throughout a year.

Impact Measures

Jobs

Number of full-time equivalent (FTE) jobs. Part-time positions are considered half of one FTE worker with seasonal workers calculated proportionally to one full-time worker.

Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Ainsworth Regional Airport

ANW

Visitor Spending $999K

On-Airport $1.5M

Construction $247K

Spin-Off

8 ON-AIRPORT EMPLOYEES

$143K AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

1,321 ANNUAL VISITORS

31 JOBS

$1.4M PAYROLL

$2.8M IMPACT

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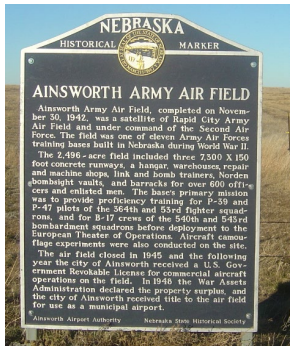
nebraskaaviationcounts.com



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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Albion Municipal Airport

BVN

Visitor Spending
$386K

On-Airport
$713K

Construction
$0

Spin-Off

1.25
ON-AIRPORT EMPLOYEES

$0
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

510
ANNUAL VISITORS

8
JOBS

$450K
PAYROLL

$1.1M
IMPACT

Albion
NEBRASKA

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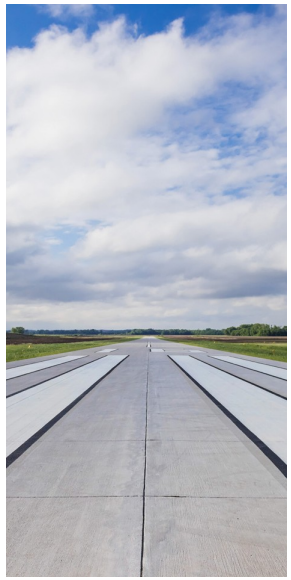

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Payroll
Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact
Combined annual value of goods and services generated from any airport-related activity.

Alliance Municipal Airport
AIA

Visitor Spending $5.2M

On-Airport $5.3M

Construction $4.6M

Spin-Off

35 ON-AIRPORT EMPLOYEES

$2.6M AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

1,376 ANNUAL VISITORS

221 JOBS
$10M PAYROLL
$20.7M IMPACT

Nebraska Aviation Counts!

Considering a new project at the airport?
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Payroll
Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact
Combined annual value of goods and services generated from any airport-related activity.

Alma Municipal Airport
4D9

Visitor Spending
$1.2M

On-Airport
$959K

Construction
$350K

Spin-Off

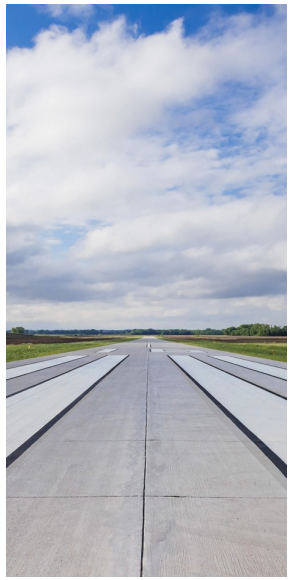
7.5
ON-AIRPORT EMPLOYEES

$202K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

1,000
ANNUAL VISITORS

30
JOBS
$893K
PAYROLL
$ 2.5M
IMPACT

Considering a new project at the airport?
Try the new project calculator
nebraskaaviationcounts.com



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Impact Types

Direct Impacts

Related to the provisions of aviation services, visitors' spending, or the activity of aviation-reliant businesses.

Spin-Off

Indirect Impacts

Any portion of direct business revenue from affected businesses used to purchase goods or services within the state.

Induced Impacts

Any portion of direct or indirect revenues paid to on-airport workers and spent on goods and services within the state.

Total Economic Impacts

The total sum of both direct impacts and spin-off effects generated throughout a year.

Impact Measures

Jobs

Number of full-time equivalent (FTE) jobs. Part-time positions are considered half of one FTE worker with seasonal workers calculated proportionally to one full-time worker.

Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Arapahoe Municipal Airport

37V

Visitor Spending $159K

On-Airport $497K

Construction $1K

Spin-Off

2.5 ON-AIRPORT EMPLOYEES

$545 AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

210 ANNUAL VISITORS

7 JOBS

$146K PAYROLL

$656K IMPACT

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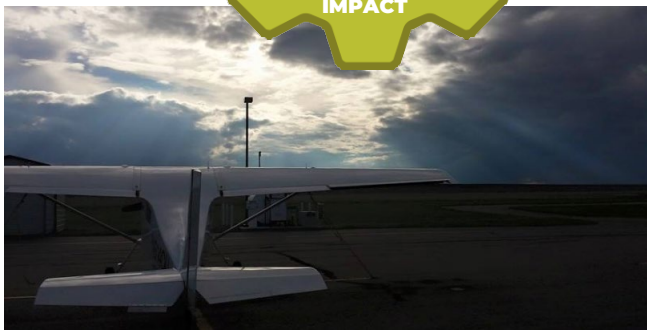

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Stuart-Atkinson Municipal Airport

8V2

Visitor Spending $605K

On-Airport $543K

Construction $314K

Spin-Off

2.5 ON-AIRPORT EMPLOYEES

$182K AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

800 ANNUAL VISITORS

13 JOBS

$ 581K PAYROLL

$ 1.5M IMPACT

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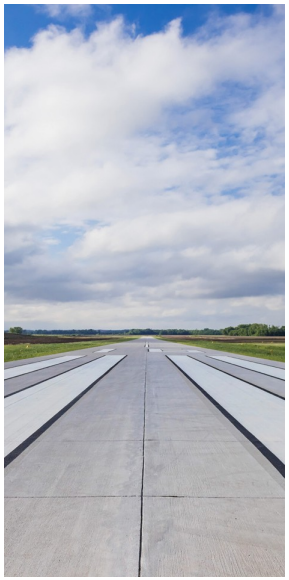

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Number of full-time equivalent (FTE) jobs. Part-time positions are considered half of one FTE worker with seasonal workers calculated proportionally to one full-time worker.

Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Farington Field
K01

Visitor Spending
$605K

On-Airport
$131K

Construction
$1.3M

Spin-Off

1.25
ON-AIRPORT EMPLOYEES

$738K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

800
ANNUAL VISITORS

18
JOBS
$1.5M
PAYROLL
$ 2M
IMPACT

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Aurora Municipal Airport – Al Potter Field

AUH

Visitor Spending
$3M

On-Airport
$2.6M

Construction
$1.5M

Spin-Off

10.75
ON-AIRPORT EMPLOYEES

$844K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

2,484
ANNUAL VISITORS

61
JOBS

$2.8M
PAYROLL

$7.1M
IMPACT

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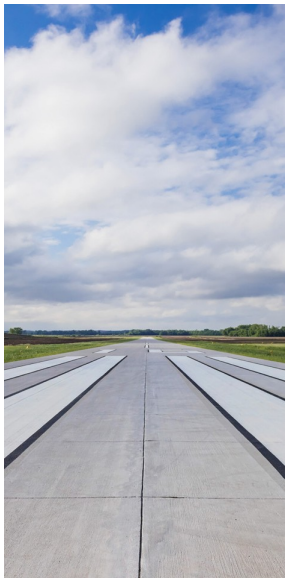

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Number of full-time equivalent (FTE) jobs. Part-time positions are considered half of one FTE worker with seasonal workers calculated proportionally to one full-time worker.

Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Rock County Airport

RBE

Visitor Spending $162K

On-Airport $575K

Construction $98K

Spin-Off

2.25 ON-AIRPORT EMPLOYEES

$56K AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

395 ANNUAL VISITORS

6 JOBS

$222K PAYROLL

$835K IMPACT

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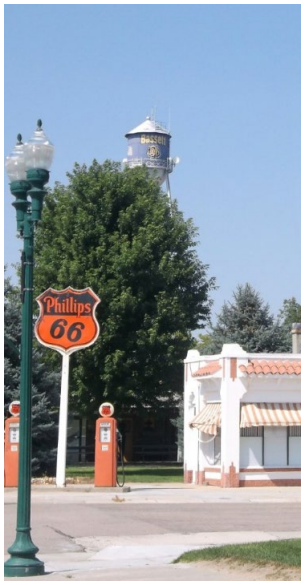

Beatrice Municipal Airport
BIE

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Induced Impacts
Any portion of direct or indirect revenues paid to on-airport workers and spent on goods and services within the state.

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The total sum of both direct impacts and spin-off effects generated throughout a year.

Impact Measures

Jobs
Number of full-time equivalent (FTE) jobs. Part-time positions are considered half of one FTE worker with seasonal workers calculated proportionally to one full-time worker.

Payroll
Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact
Combined annual value of goods and services generated from any airport-related activity.

Visitor Spending
$3.7M

On-Airport
$3.8M

Construction
$3.0M

Spin-Off

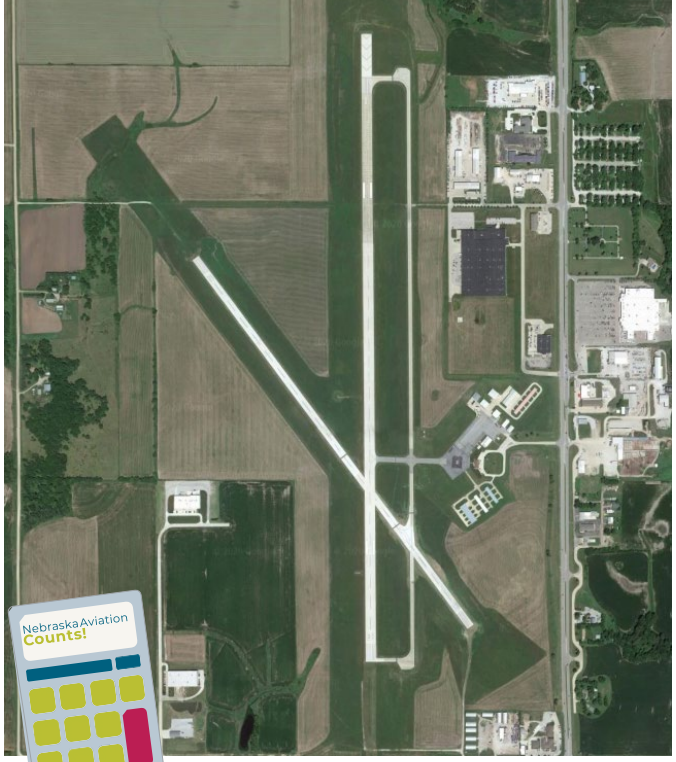
49
ON-AIRPORT EMPLOYEES*

$1.7M
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

3,003
ANNUAL VISITORS

157
JOBS
$4.8M
PAYROLL
$10.4M
IMPACT

*On airport employees includes the employees of all tenants employed by aviation and non-aviation businesses on airport property. In Beatrice, this includes retail and hospitality businesses that lease property from the airport.



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Number of full-time equivalent (FTE) jobs. Part-time positions are considered half of one FTE worker with seasonal workers calculated proportionally to one full-time worker.

Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Blair Municipal Airport

BTA

Visitor Spending
$3.7M

On-Airport
$1.1M

Construction
$952K

Spin-Off

9.5
ON-AIRPORT EMPLOYEES

$550K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

3,000
ANNUAL VISITORS

69
JOBS

$2.8M
PAYROLL

$5.7M
IMPACT

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Bloomfield Municipal Airport 84Y

Visitor Spending $491K

On-Airport $692K

Construction $0

Spin-Off

4.5 ON-AIRPORT EMPLOYEES

$0 AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

649 ANNUAL VISITORS

13 JOBS

$343K PAYROLL

$ 1.2M IMPACT

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Broken Bow Municipal Airport – Keith Glaze Field

BBW

Visitor Spending $932K

On-Airport $967K

Construction $1.4M

Spin-Off

3.25 ON-AIRPORT EMPLOYEES

$812K AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

764 ANNUAL VISITORS

28 JOBS

$2M PAYROLL

$3.3M IMPACT

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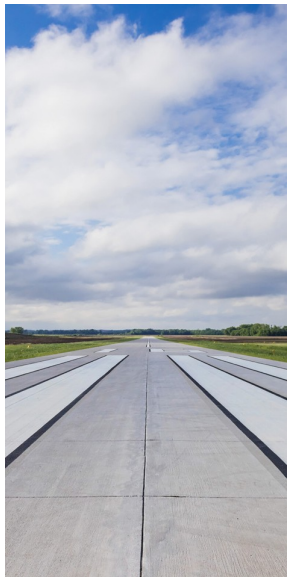

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Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Cram Field BUB

Visitor Spending $1.2M

On-Airport $671K

Construction $457K

Spin-Off

2.25 ON-AIRPORT EMPLOYEES

$264K AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

1,000 ANNUAL VISITORS

22 JOBS

$1.1M PAYROLL

$2.3M IMPACT

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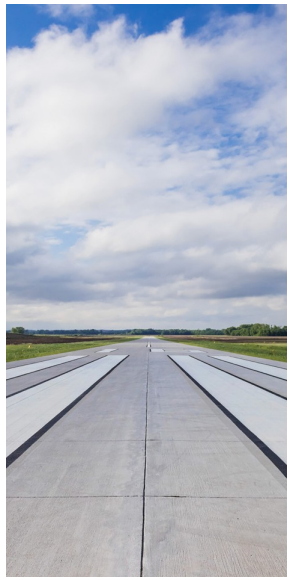

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Cambridge Municipal Airport

CSB

Visitor Spending
$2.6M

On-Airport
$745K

Construction
$0

Spin-Off

2.5
ON-AIRPORT EMPLOYEES

$0
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

3,400
ANNUAL VISITORS

36
JOBS

$1.2M
PAYROLL

$3.3M
IMPACT

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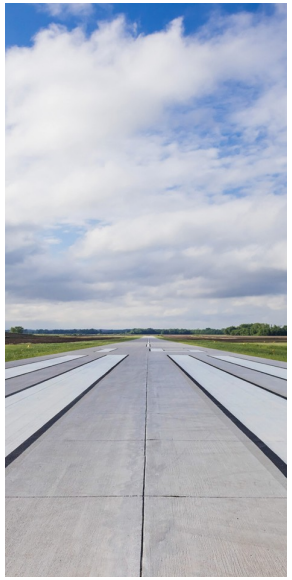

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Central City Municipal – Larry Reineke Field

07K

Visitor Spending
$1.4M

On-Airport
$1.3M

Construction
$377K

Spin-Off

7
ON-AIRPORT EMPLOYEES

$218K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

1,800
ANNUAL VISITORS

29
JOBS

$1M
PAYROLL

$ 3.1M
IMPACT

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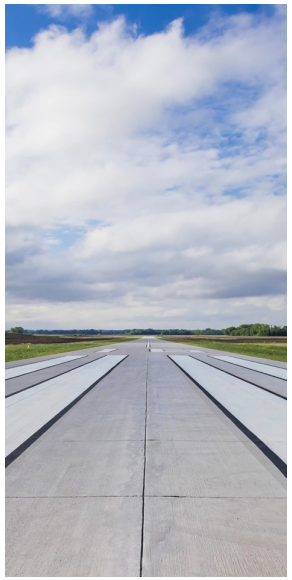

Chadron Municipal Airport
CDR

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Payroll
Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact
Combined annual value of goods and services generated from any airport-related activity.

Visitor Spending
$6.8M

On-Airport
$1.9M

Construction
$3.0M

Spin-Off

11.5
ON-AIRPORT EMPLOYEES

$1.7M
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

1,796
ANNUAL VISITORS

243
JOBS
$9.3M
PAYROLL
$21.6M
IMPACT

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Any portion of direct or indirect revenues paid to on-airport workers and spent on goods and services within the state.

Total Economic Impacts

The total sum of both direct impacts and spin-off effects generated throughout a year.

Impact Measures

Jobs

Number of full-time equivalent (FTE) jobs. Part-time positions are considered half of one FTE worker with seasonal workers calculated proportionally to one full-time worker.

Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Billy G. Ray Field

CNP

Visitor Spending
$194K

On-Airport
$298K

Construction
$0

Spin-Off

1
ON-AIRPORT EMPLOYEES

$0
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

473
ANNUAL VISITORS

4
JOBS
$175K
PAYROLL
$492K
IMPACT

Considering a new project at the airport?
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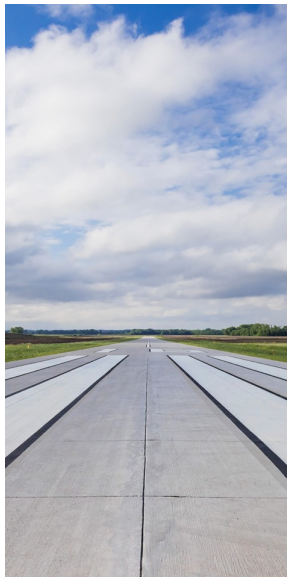

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Columbus Municipal Airport

OLU

Visitor Spending
$7.8M

On-Airport
$6.9M

Construction
$0

Spin-Off

15
ON-AIRPORT EMPLOYEES

$0
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

6,375
ANNUAL VISITORS

133
JOBS

$4.1M
PAYROLL

$14.7M
IMPACT

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Cozad Municipal Airport

CZD

Visitor Spending
$7.1M

On-Airport
$876K

Construction
$210K

Spin-Off

4
ON-AIRPORT EMPLOYEES

$122K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

5,850
ANNUAL VISITORS

95
JOBS
$2.8M
PAYROLL
$8.2M
IMPACT

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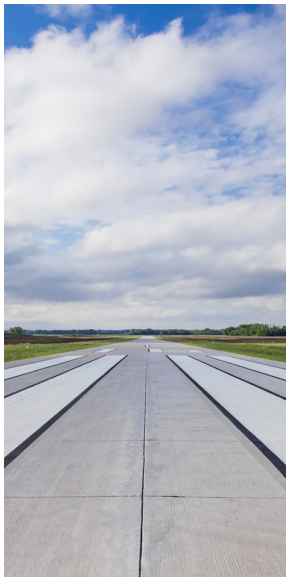

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Creighton Municipal Airport 6K3

Visitor Spending
$605K

On-Airport
$149K

Construction
$312K

Spin-Off

1
ON-AIRPORT EMPLOYEES

$180K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

800
ANNUAL VISITORS

10
JOBS

$556K
PAYROLL

$ 1.1M
IMPACT

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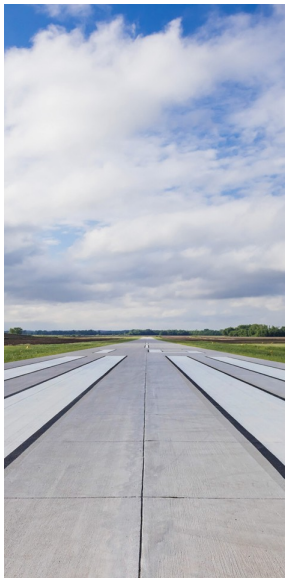

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Crete Municipal Airport

CEK

Visitor Spending
$14.5M

On-Airport
$1.7M

Construction
$406K

Spin-Off

22.25
ON-AIRPORT EMPLOYEES

$235K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

11,875
ANNUAL VISITORS

213
JOBS

$6.1M
PAYROLL

$16.6M
IMPACT

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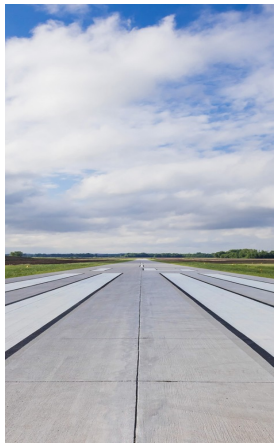

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Curtis Municipal Airport

47V

Visitor Spending
$218K

On-Airport
$489K

Construction
$0

Spin-Off

2.25
ON-AIRPORT EMPLOYEES

$0
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

289
ANNUAL VISITORS

6
JOBS

$145K
PAYROLL

$708K
IMPACT

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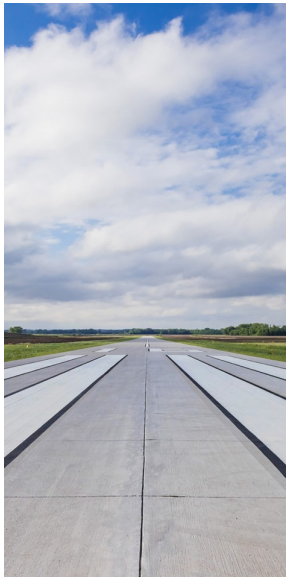

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Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

David City Municipal Airport 93Y

Visitor Spending $1.1M

On-Airport $13.5M

Construction $517K

Spin-Off

19 ON-AIRPORT EMPLOYEES

$299K AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

1,445 ANNUAL VISITORS

70 JOBS

$3.5M PAYROLL

$15.1M IMPACT

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Fairbury Municipal Airport

FBY

Visitor Spending
$934K

On-Airport
$4.1M

Construction
$372K

Spin-Off

15.25
ON-AIRPORT EMPLOYEES

$215K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

765
ANNUAL VISITORS

34
JOBS

$1.2M
PAYROLL

$5.4M
IMPACT

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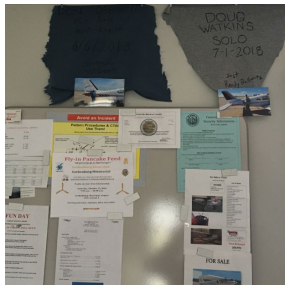

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Fairmont State Airfield

FMZ

Visitor Spending
$1.1M

On-Airport
$1.3M

Construction
$0

Spin-Off

8
ON-AIRPORT EMPLOYEES

$0
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

1,425
ANNUAL VISITORS

31
JOBS
$763K
PAYROLL
$2.4M
IMPACT

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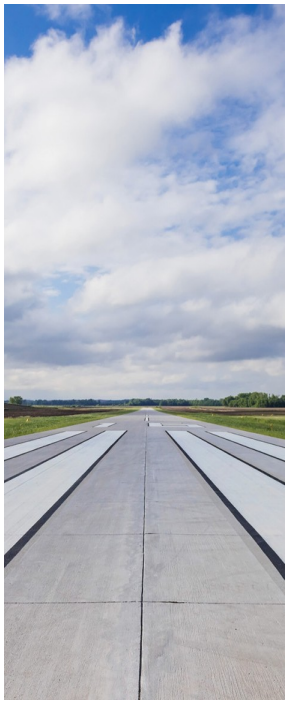

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Brenner Field FNB

Visitor Spending $1.2M

On-Airport $503K

Construction $211K

Spin-Off

2.5 ON-AIRPORT EMPLOYEES

$122K AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

956 ANNUAL VISITORS

20 JOBS

$770K PAYROLL

$ 1.9M IMPACT

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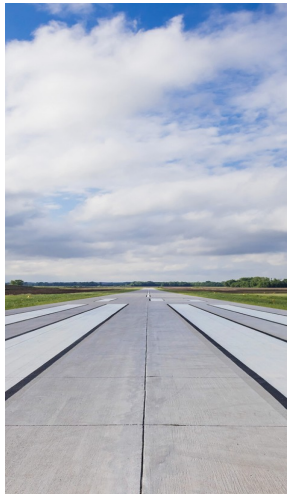

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Fremont Municipal Airport

FET

Visitor Spending
$6.1M

On-Airport
$4.4M

Construction
$0

Spin-Off

15
ON-AIRPORT EMPLOYEES

$0
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

4,996
ANNUAL VISITORS

91
JOBS

$2.7M
PAYROLL

$10.5M
IMPACT

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Genoa Municipal Airport

97Y

Visitor Spending
$81K

On-Airport
$151K

Construction
$16K

Spin-Off

1
ON-AIRPORT EMPLOYEES

$9K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

198
ANNUAL VISITORS

2
JOBS

$102K
PAYROLL

$247K
IMPACT

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Gordon Municipal Airport
GRN

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Payroll
Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact
Combined annual value of goods and services generated from any airport-related activity.

Visitor Spending
$397K

On-Airport
$1.1M

Construction
$954K

Spin-Off

7
ON-AIRPORT EMPLOYEES

$552K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

525
ANNUAL VISITORS

23
JOBS

$1.3M
PAYROLL

$2.4M
IMPACT

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Gothenburg Municipal Airport

GTE

Visitor Spending $605K

On-Airport $262K

Construction $52K

Spin-Off

2.5 ON-AIRPORT EMPLOYEES

$30K AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

800 ANNUAL VISITORS

11 JOBS

$348K PAYROLL

$ 919K IMPACT

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Central Nebraska Regional Airport GRI

Visitor Spending
$17.1M

On-Airport
$22.3M

Construction
$11.7M

Spin-Off

186
ON-AIRPORT EMPLOYEES

$6.8M
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

4,500
ANNUAL VISITORS

2,188
JOBS

$ 66.7M
PAYROLL

$ 172M
IMPACT

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nebraskaaviationcounts.com

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Impact Types

Direct Impacts

Related to the provisions of aviation services, visitors' spending, or the activity of aviation-reliant businesses.

Spin-Off

Indirect Impacts

Any portion of direct business revenue from affected businesses used to purchase goods or services within the state.

Induced Impacts

Any portion of direct or indirect revenues paid to on-airport workers and spent on goods and services within the state.

Total Economic Impacts

The total sum of both direct impacts and spin-off effects generated throughout a year.

Impact Measures

Jobs

Number of full-time equivalent (FTE) jobs. Part-time positions are considered half of one FTE worker with seasonal workers calculated proportionally to one full-time worker.

Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Grant Municipal Airport

GGF

Visitor Spending $4.3M

On-Airport $1.7M

Construction $366K

Spin-Off

14.75 ON-AIRPORT EMPLOYEES

$211K AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

3,494 ANNUAL VISITORS

79 JOBS

$2.5M PAYROLL

$6.3M IMPACT

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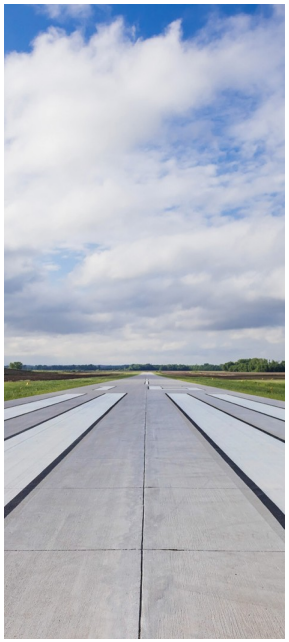

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Hartington Municipal Airport – Bud Becker Field

0B4

Visitor Spending
$614K

On-Airport
$2.2M

Construction
$375K

Spin-Off

11
ON-AIRPORT EMPLOYEES

$217K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

813
ANNUAL VISITORS

27
JOBS

$871K
PAYROLL

$ 3.1M
IMPACT

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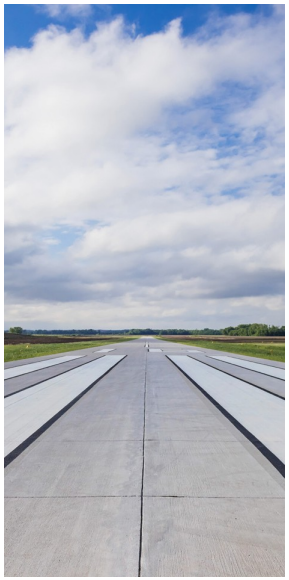

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Harvard State Airfield

08K

Visitor Spending
$492K

On-Airport
$641K

Construction
$0

Spin-Off

4.5
ON-AIRPORT EMPLOYEES

$0
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

1,200
ANNUAL VISITORS

13
JOBS

$279K
PAYROLL

$ 1.1M
IMPACT

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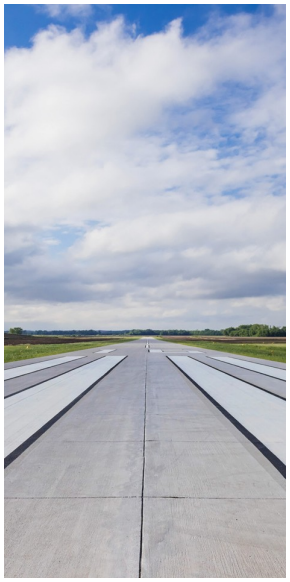

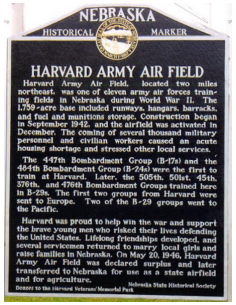

Hastings Municipal Airport
HSI

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Number of full-time equivalent (FTE) jobs. Part-time positions are considered half of one FTE worker with seasonal workers calculated proportionally to one full-time worker.

Payroll
Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact
Combined annual value of goods and services generated from any airport-related activity.

Visitor Spending
$8.4M

On-Airport
$1.6M

Construction
$519K

Spin-Off

20.5
ON-AIRPORT EMPLOYEES

$300K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

6,862
ANNUAL VISITORS

137
JOBS

$4M
PAYROLL

$10.5M
IMPACT

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Hay Springs Municipal Airport

4V6

Visitor Spending
$97K

On-Airport
$298K

Construction
$0

Spin-Off

1
ON-AIRPORT EMPLOYEES

$0
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

237
ANNUAL VISITORS

3
JOBS
$142K
PAYROLL
$395K
IMPACT

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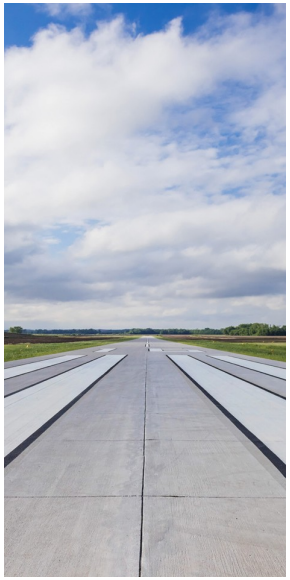

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Hebron Municipal Airport

HJH

Visitor Spending $605K

On-Airport $1.6M

Construction $536K

Spin-Off

5.5 ON-AIRPORT EMPLOYEES

$310K AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

800 ANNUAL VISITORS

22 JOBS

$1.3M PAYROLL

$2.8M IMPACT

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Brewster Field

HDE

Visitor Spending $3.7M

On-Airport $4.1M

Construction $454K

Spin-Off

24.25 ON-AIRPORT EMPLOYEES

$262K AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

3,043 ANNUAL VISITORS

95 JOBS

$3.1M PAYROLL

$8.2M IMPACT

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Grant County Airport

1V2

Visitor Spending
$640K

On-Airport
$687K

Construction
$0

Spin-Off

1.25
ON-AIRPORT EMPLOYEES

$0
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

1,560
ANNUAL VISITORS

11
JOBS
$369K
PAYROLL
$ 1.3M
IMPACT

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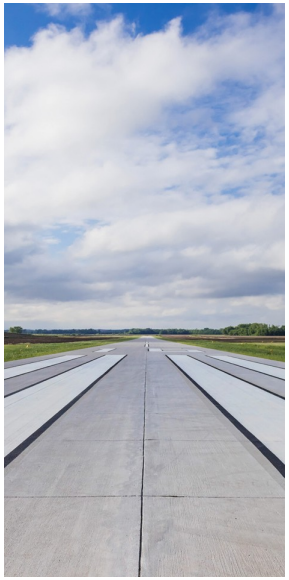

Imperial Municipal Airport
IML

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Economic Impact
Combined annual value of goods and services generated from any airport-related activity.

Visitor Spending
$4.9M

On-Airport
$2.6M

Construction
$1.2M

Spin-Off

14
ON-AIRPORT EMPLOYEES

$692K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

3,998
ANNUAL VISITORS

87
JOBS
$3.2M
PAYROLL
$8.7M
IMPACT

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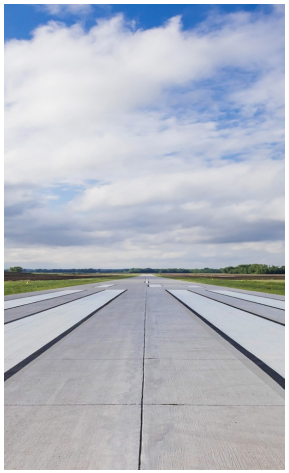

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Kearney Regional Airport

EAR

Visitor Spending
$24.9M

On-Airport
$5.3M

Construction
$5.6M

Spin-Off

40.5
ON-AIRPORT EMPLOYEES

$3.2M
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

6,567
ANNUAL VISITORS

533
JOBS

$18.3M
PAYROLL

$44.6M
IMPACT

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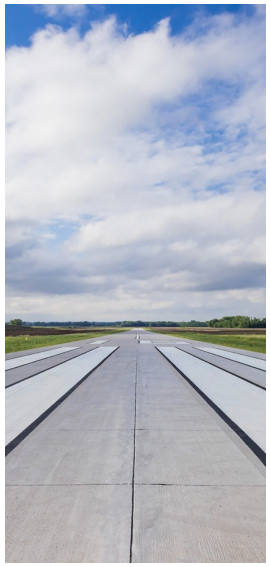

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Payroll

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Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Robert E. Arraj Field

IBM

Visitor Spending
$1.3M

On-Airport
$373K

Construction
$162K

Spin-Off

1.75
ON-AIRPORT EMPLOYEES

$94K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

1,047
ANNUAL VISITORS

20
JOBS
$ 730K
PAYROLL
$ 1.8M
IMPACT

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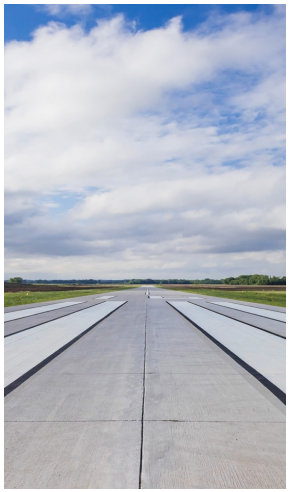

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Jim Kelly Field

LXN

Visitor Spending $3.4M

On-Airport $2.5M

Construction $217K

Spin-Off

14.5 ON-AIRPORT EMPLOYEES

$126K AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

2,750 ANNUAL VISITORS

72 JOBS

$2.2M PAYROLL

$6.1M IMPACT

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Lincoln Airport

LNK

Visitor Spending
$43.4M

On-Airport
$1.1B

Construction
$14.4M

Spin-Off

2,657
ON-AIRPORT EMPLOYEES

$8.3M
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

14,851
ANNUAL VISITORS

8,884
JOBS

$508M
PAYROLL

$ 1.3B
IMPACT

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Loup City Municipal Airport

0F4

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Visitor Spending
$1.2M

On-Airport
$272K

Construction
$137K

Spin-Off

1.25
ON-AIRPORT EMPLOYEES

$79K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

1,000
ANNUAL VISITORS

19
JOBS
$647K
PAYROLL
$ 1.6M
IMPACT

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Impact Types

Direct Impacts

Related to the provisions of aviation services, visitors' spending, or the activity of aviation-reliant businesses.

Spin-Off

Indirect Impacts

Any portion of direct business revenue from affected businesses used to purchase goods or services within the state.

Induced Impacts

Any portion of direct or indirect revenues paid to on-airport workers and spent on goods and services within the state.

Total Economic Impacts

The total sum of both direct impacts and spin-off effects generated throughout a year.

Impact Measures

Jobs

Number of full-time equivalent (FTE) jobs. Part-time positions are considered half of one FTE worker with seasonal workers calculated proportionally to one full-time worker.

Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

McCook Ben Nelson Regional Airport

MCK

Visitor Spending
$17.2M

On-Airport
$1.9M

Construction
$269K

Spin-Off

17
ON-AIRPORT EMPLOYEES

$155K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

4,521
ANNUAL VISITORS

264
JOBS

$7.8M
PAYROLL

$21.6M
IMPACT

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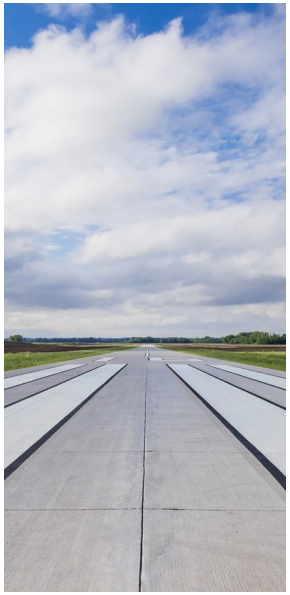

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Pioneer Village Field

0V3

Visitor Spending
$874K

On-Airport
$694K

Construction
$147K

Spin-Off

5.5
ON-AIRPORT EMPLOYEES

$85K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

1,150
ANNUAL VISITORS

22
JOBS

$566K
PAYROLL

$1.7M
IMPACT

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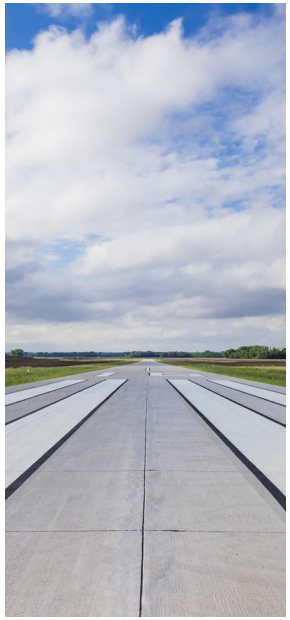

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Nebraska City Municipal Airport

AFK

Visitor Spending
$3.1M

On-Airport
$692K

Construction
$551K

Spin-Off

4.5
ON-AIRPORT EMPLOYEES

$319K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

2,500
ANNUAL VISITORS

48
JOBS

$1.7M
PAYROLL

$4.3M
IMPACT

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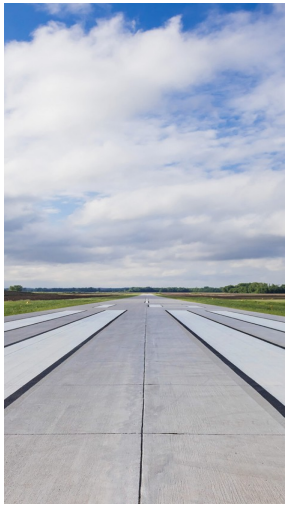

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Antelope County Airport

4V9

Visitor Spending
$2.4M

On-Airport
$4.1M

Construction
$0

Spin-Off

18.5
ON-AIRPORT EMPLOYEES

$0
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

3,156
ANNUAL VISITORS

54
JOBS

$1.4M
PAYROLL

$6.5M
IMPACT

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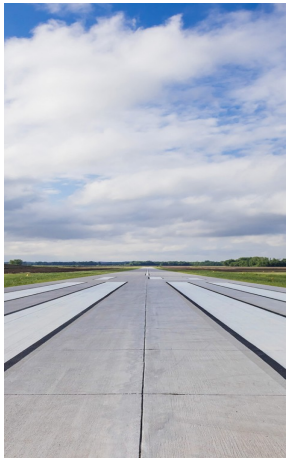

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Norfolk Regional Airport – Karl Stefan Memorial Field

OFK

Visitor Spending $3.2M

On-Airport $8.6M

Construction $1.7M

Spin-Off

22 ON-AIRPORT EMPLOYEES

$997K AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

2,652 ANNUAL VISITORS

109 JOBS

$4.4M PAYROLL

$13.6M IMPACT

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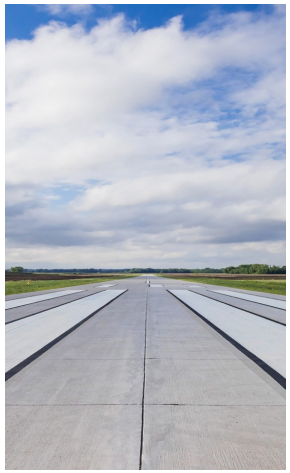

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

North Omaha Airport

3NO

Visitor Spending
$1.9M

On-Airport
$3.6M

Construction
$130K

Spin-Off

28
ON-AIRPORT EMPLOYEES

$75K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

639
ANNUAL VISITORS

83
JOBS

$1.5M
PAYROLL

$5.6M
IMPACT

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

North Platte Regional Airport – Lee Bird Field

LBF

Visitor Spending
$54.6M

On-Airport
$72.3M

Construction
$2.0M

Spin-Off

180
ON-AIRPORT EMPLOYEES

$1.2M
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

14,385
ANNUAL VISITORS

1,397
JOBS

$ 44.4M
PAYROLL

$ 155M
IMPACT

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

The O'Neill Municipal Airport – John L. Baker Field

ONL

Visitor Spending
$2.1M

On-Airport
$1.7M

Construction
$428K

Spin-Off

8.5
ON-AIRPORT EMPLOYEES

$247K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

1,747
ANNUAL VISITORS

47
JOBS

$1.7M
PAYROLL

$4.2M
IMPACT

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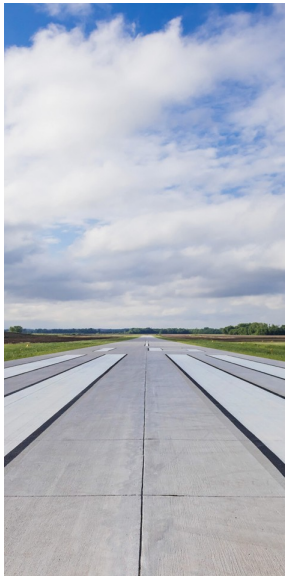

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Searle Field

OGA

Visitor Spending
$2.7M

On-Airport
$786K

Construction
$443K

Spin-Off

4.5
ON-AIRPORT EMPLOYEES

$256K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

2,213
ANNUAL VISITORS

42
JOBS
$1.5M
PAYROLL
$3.9M
IMPACT

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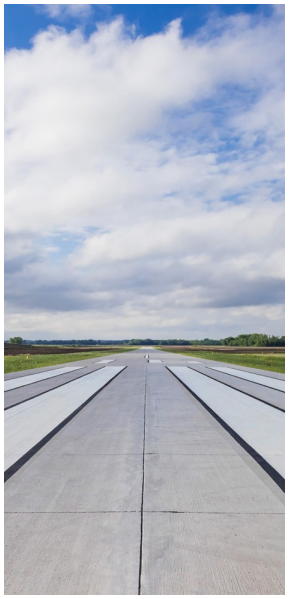

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Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Eppley Airfield OMA

Visitor Spending
$50.5M

On-Airport
$640M

Construction
$14.4M

Spin-Off

3,275
ON-AIRPORT EMPLOYEES

$8.3M
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

17,297
ANNUAL VISITORS

51,610
JOBS

$1.6B
PAYROLL

$ 4.3B
IMPACT

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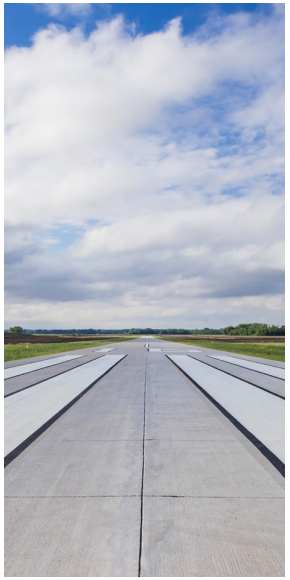

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Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Millard Airport MLE

Visitor Spending
$68.4M

On-Airport
$8.3M

Construction
$744K

Spin-Off

28
ON-AIRPORT EMPLOYEES

$430K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

23,423
ANNUAL VISITORS

904
JOBS
$28.2M
PAYROLL
$77.5M
IMPACT

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Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Evelyn Sharp Field

ODX

Visitor Spending
$1.1M

On-Airport
$466K

Construction
$476K

Spin-Off

2
ON-AIRPORT EMPLOYEES

$275K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

870
ANNUAL VISITORS

20
JOBS

$930K
PAYROLL

$ 2M
IMPACT

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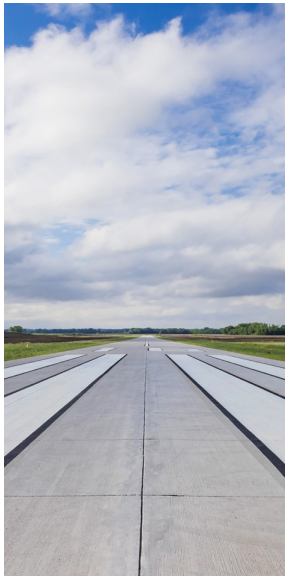

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Garden County Airport

OKS

Visitor Spending $303K

On-Airport $110K

Construction $455K

Spin-Off

1 ON-AIRPORT EMPLOYEES

$263K AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

1,123 ANNUAL VISITORS

8 JOBS

$568K PAYROLL

$869K IMPACT

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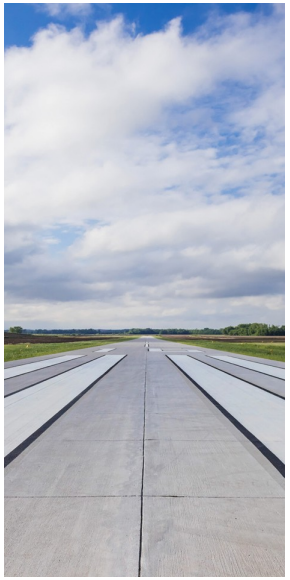

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Number of full-time equivalent (FTE) jobs. Part-time positions are considered half of one FTE worker with seasonal workers calculated proportionally to one full-time worker.

Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Pawnee City Municipal Airport

50K

Visitor Spending
$73K

On-Airport
$447K

Construction
$255K

Spin-Off

1.5
ON-AIRPORT EMPLOYEES

$148K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

177
ANNUAL VISITORS

6
JOBS

$ 427K
PAYROLL

$ 775K
IMPACT

Considering a new project at the airport?
Try the new project calculator
nebraskaaviationcounts.com

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Related to the provisions of aviation services, visitors' spending, or the activity of aviation-reliant businesses.

Spin-Off

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Any portion of direct business revenue from affected businesses used to purchase goods or services within the state.

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Any portion of direct or indirect revenues paid to on-airport workers and spent on goods and services within the state.

Total Economic Impacts

The total sum of both direct impacts and spin-off effects generated throughout a year.

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Pender Municipal Airport

0C4

Visitor Spending
$548K

On-Airport
$1M

Construction
$389K

Spin-Off

3.25
ON-AIRPORT EMPLOYEES

$225K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

725
ANNUAL VISITORS

14
JOBS
$708K
PAYROLL
$2M
IMPACT

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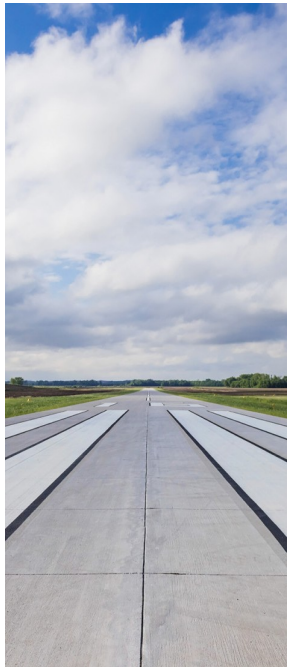

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Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Plattsmouth Municipal Airport

PMV

Visitor Spending $6.3M

On-Airport $797K

Construction $1.3M

Spin-Off

4 ON-AIRPORT EMPLOYEES

$769K AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

5,198 ANNUAL VISITORS

91 JOBS

$3.6M PAYROLL

$8.5M IMPACT

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Red Cloud Municipal Airport

7V7

Visitor Spending
$605K

On-Airport
$582K

Construction
$0

Spin-Off

7
ON-AIRPORT EMPLOYEES

$0
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

800
ANNUAL VISITORS

18
JOBS

$307K
PAYROLL

$1.2M
IMPACT

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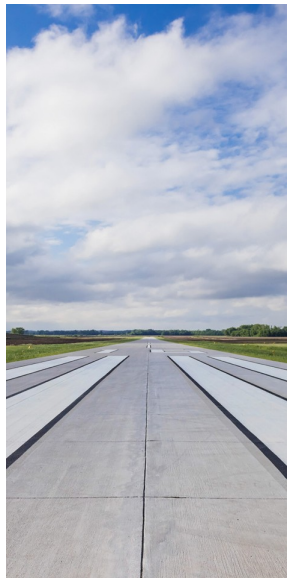

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Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Modisett Field

9V5

Visitor Spending $305K

On-Airport $1M

Construction $91K

Spin-Off

3.25 ON-AIRPORT EMPLOYEES

$53K AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

742 ANNUAL VISITORS

11 JOBS

$403K PAYROLL

$ 1.4M IMPACT

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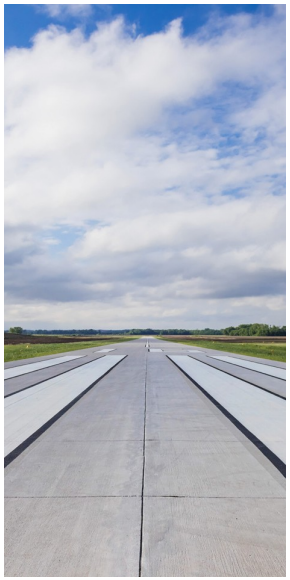

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Sargent Municipal Airport

09K

Visitor Spending
$328K

On-Airport
$2.2M

Construction
$0

Spin-Off

7
ON-AIRPORT EMPLOYEES

$0
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

799
ANNUAL VISITORS

12
JOBS

$384K
PAYROLL

$2.5M
IMPACT

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Western Nebraska Regional Airport – William B. Helig Field

BFF

Visitor Spending $28.7M

On-Airport $30.2M

Construction $1.5M

Spin-Off

174 ON-AIRPORT EMPLOYEES

$849K AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

7,553 ANNUAL VISITORS

1,040 JOBS

$31.4M PAYROLL

$86.4M IMPACT

WESTERN NEBRASKA REGIONAL AIRPORT

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Scribner State Airfield

SCB

Visitor Spending $497K

On-Airport $528K

Construction $1.3M

Spin-Off

3 ON-AIRPORT EMPLOYEES

$758K AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

1,211 ANNUAL VISITORS

20 JOBS

$1.5M PAYROLL

$2.3M IMPACT

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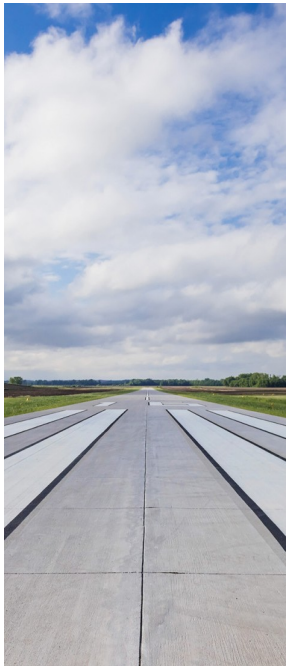

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Seward Municipal Airport

SWT

Visitor Spending
$4.7M

On-Airport
$3M

Construction
$109K

Spin-Off

23
ON-AIRPORT EMPLOYEES

$63K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

3,825
ANNUAL VISITORS

97
JOBS

$2.4M
PAYROLL

$7.8M
IMPACT

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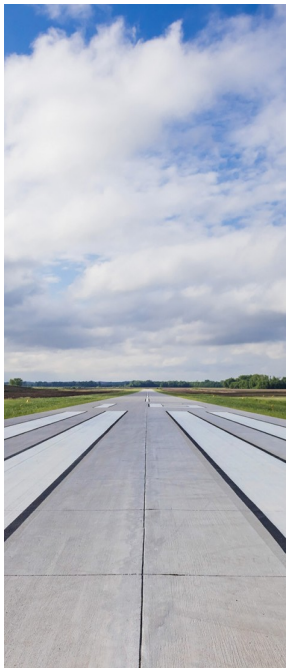

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Sidney Municipal Airport – Lloyd W. Carr Field

SNY

Visitor Spending
$2.4M

On-Airport
$339K

Construction
$126K

Spin-Off

5
ON-AIRPORT EMPLOYEES

$73K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

2,004
ANNUAL VISITORS

38
JOBS

$1.1M
PAYROLL

$2.9M
IMPACT

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Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Martin Field

7K8

Visitor Spending
$933K

On-Airport
$980K

Construction
$0

Spin-Off

11
ON-AIRPORT EMPLOYEES

$0
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

764
ANNUAL VISITORS

30
JOBS
$499K
PAYROLL
$1.9M
IMPACT

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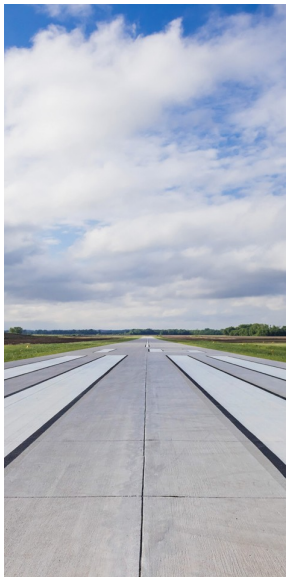

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Superior Municipal Airport

12K

Visitor Spending
$605K

On-Airport
$2.8M

Construction
$276K

Spin-Off

11.25
ON-AIRPORT EMPLOYEES

$159K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

800
ANNUAL VISITORS

23
JOBS

$820K
PAYROLL

$3.7M
IMPACT

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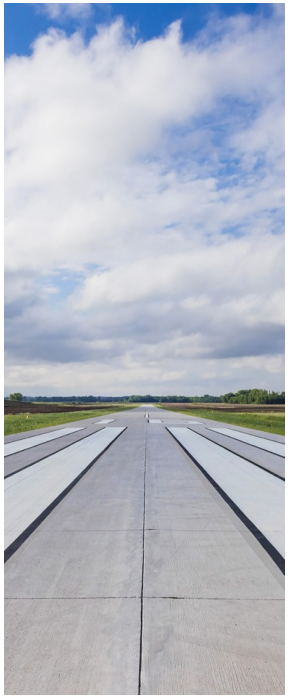

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Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Tecumseh Municipal Airport

0G3

Visitor Spending $623K

On-Airport $75K

Construction $437K

Spin-Off

0.25 ON-AIRPORT EMPLOYEES

$253K AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

819 ANNUAL VISITORS

12 JOBS

$665K PAYROLL

$ 1.1M IMPACT

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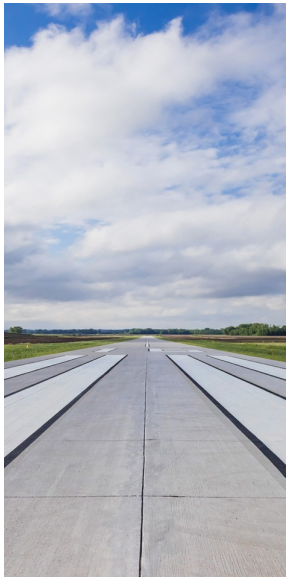

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Payroll

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Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Tekamah Municipal Airport TQE

Visitor Spending
$4.3M

On-Airport
$2.5M

Construction
$733K

Spin-Off

10.5
ON-AIRPORT EMPLOYEES

$424K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

5,750
ANNUAL VISITORS

71
JOBS
$2.5M
PAYROLL
$ 7.6M
IMPACT

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Thomas County Airport
TIF

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Economic Impact
Combined annual value of goods and services generated from any airport-related activity.

Visitor Spending
$328K

On-Airport
$468K

Construction
$544K

Spin-Off

1.5
ON-AIRPORT EMPLOYEES

$315K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

800
ANNUAL VISITORS

11
JOBS
$728K
PAYROLL
$1.3M
IMPACT

Considering a new project at the airport?
Try the new project calculator
nebraskaaviationcounts.com

Study Methodology

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The primary and secondary data collected for Nebraska airports provided the direct impacts driving the economic modeling effort for this study. The Impact Analysis for Planning (IMPLAN) modeling system was used to calculate aviation's total impact to the Nebraska economy.

Impact Types

Direct Impacts

Related to the provisions of aviation services, visitors' spending, or the activity of aviation-reliant businesses.

Spin-Off

Indirect Impacts

Any portion of direct business revenue from affected businesses used to purchase goods or services within the state.

Induced Impacts

Any portion of direct or indirect revenues paid to on-airport workers and spent on goods and services within the state.

Total Economic Impacts

The total sum of both direct impacts and spin-off effects generated throughout a year.

Impact Measures

Jobs

Number of full-time equivalent (FTE) jobs. Part-time positions are considered half of one FTE worker with seasonal workers calculated proportionally to one full-time worker.

Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Miller Field

VTN

Visitor Spending
$3.5M

On-Airport
$1.2M

Construction
$315K

Spin-Off

14
ON-AIRPORT EMPLOYEES

$182K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

2,880
ANNUAL VISITORS

69
JOBS

$2M
PAYROLL

$5M
IMPACT

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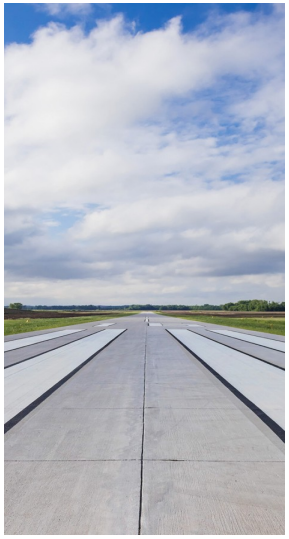
nebraskaaviationcounts.com



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Impact Measures

Jobs

Number of full-time equivalent (FTE) jobs. Part-time positions are considered half of one FTE worker with seasonal workers calculated proportionally to one full-time worker.

Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Wahoo Municipal Airport

AHQ

Visitor Spending
$5.5M

On-Airport
$3.4M

Construction
$184K

Spin-Off

16
ON-AIRPORT EMPLOYEES

$106K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

4,496
ANNUAL VISITORS

103
JOBS

$2.9M
PAYROLL

$9.1M
IMPACT

Considering a new project at the airport?
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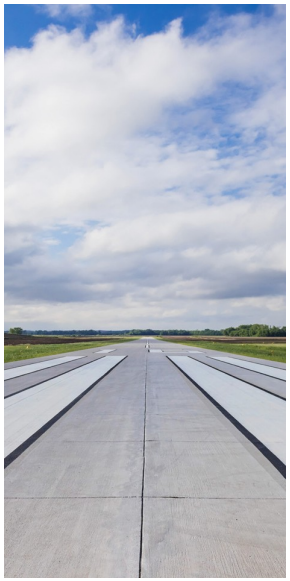
nebraskaaviationcounts.com



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Impact Measures

Jobs

Number of full-time equivalent (FTE) jobs. Part-time positions are considered half of one FTE worker with seasonal workers calculated proportionally to one full-time worker.

Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Wallace Municipal Airport

64V

Visitor Spending $70K

On-Airport $924K

Construction $0

Spin-Off

6 ON-AIRPORT EMPLOYEES

$0 AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

93 ANNUAL VISITORS

11 JOBS

$233K PAYROLL

$994K IMPACT

Considering a new project at the airport?
Try the new project calculator
nebraskaaviationcounts.com

Wayne Municipal Airport – Stan Morris Field

LCG

Study Methodology

The Nebraska Aviation Counts! team conducted the Study using guidelines set by the Federal Aviation Administration (FAA). Primary data was gathered by surveying airport managers, airport tenants, and visitors who traveled to Nebraska by commercial service or general aviation aircraft. While primary data is the core of the analysis, missing values and industry-specific information was calculated using secondary data sources.

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Impact Types

Direct Impacts

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Spin-Off

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Induced Impacts

Any portion of direct or indirect revenues paid to on-airport workers and spent on goods and services within the state.

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Impact Measures

Jobs

Number of full-time equivalent (FTE) jobs. Part-time positions are considered half of one FTE worker with seasonal workers calculated proportionally to one full-time worker.

Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

Visitor Spending $1.2M

On-Airport $1.6M

Construction $1.1M

Spin-Off

3.25 ON-AIRPORT EMPLOYEES

$635K AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

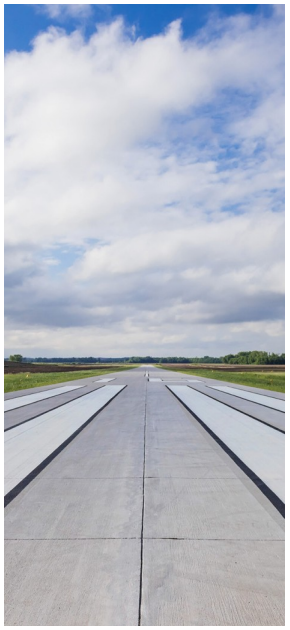
1,000 ANNUAL VISITORS

28 JOBS

$1.7M PAYROLL

$3.9M IMPACT

Considering a new project at the airport?
Try the new project calculator
nebraskaaviationcounts.com



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Total Economic Impacts

The total sum of both direct impacts and spin-off effects generated throughout a year.

Impact Measures

Jobs

Number of full-time equivalent (FTE) jobs. Part-time positions are considered half of one FTE worker with seasonal workers calculated proportionally to one full-time worker.

Payroll

Amount of total annual salary, wages, and benefits paid to all FTEs calculated under jobs.

Economic Impact

Combined annual value of goods and services generated from any airport-related activity.

York Municipal Airport

JYR

Visitor Spending
$2.6M

On-Airport
$826K

Construction
$321K

Spin-Off

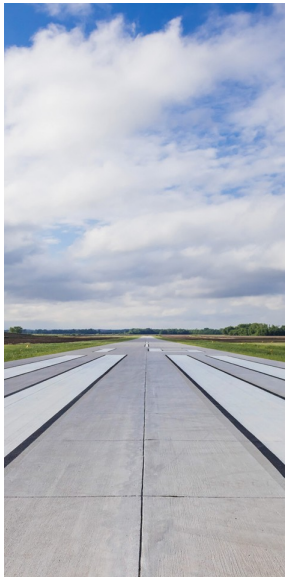
3
ON-AIRPORT EMPLOYEES

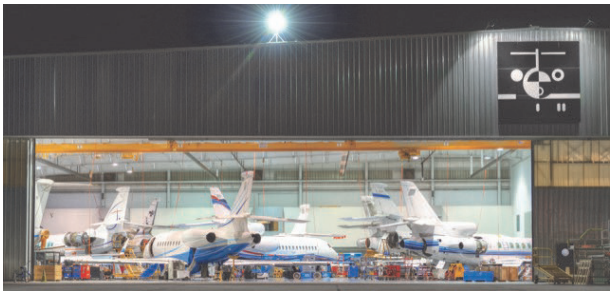
$186K
AVERAGE AIRPORT CONSTRUCTION (4 YEARS)

2,164
ANNUAL VISITORS

40
JOBS
$1.5M
PAYROLL
$ 3.8M
IMPACT

Considering a new project at the airport?
Try the new project calculator
nebraskaaviationcounts.com





Appendix C

Case Studies

General Aviation Provides Lifeline for Flood Victims

> “I think the coolest story isn’t about an individual, it’s about the pilot community as a whole. Talk about a group of people that are selfless, that’s pretty cool. They drop everything, take off work, and say hey here’s my plane.”

Collin Caneva
Volunteer Pilot

In times of natural disasters, communities can become helpless when ground infrastructure is compromised. During these moments, general aviation can provide essential support in the immediate aftermath to those affected. In the spring of 2019, Nebraska and other states along the Missouri Valley experienced record flooding, causing damages in the billions and leaving some rural areas stranded.

Forty miles northwest of Omaha, the 26,000 residents of Fremont, Nebraska found themselves surrounded by flood waters after two levees were breached. With no available roads or bridges, the Fremont Municipal Airport became a central hub for rescuers.

As the historic and catastrophic flooding continued, volunteer pilots and aviation companies provided disaster relief to and from the only operating airport for the devastated community. Following this meteorological phenomenon known as a “bomb cyclone,” Greg Kjeldgaard, the FBO’s Vice President, estimated at least 1,000 people were transported to nearby airports in Omaha, Columbus, Lincoln, and Wahoo. As aircraft provided makeshift shuttle services in and out of the area, pilots would continue to return to deliver any amount of relief supplies they could carry to the remaining victims. These efforts proved to be a lifeline for the remaining victims in the four days it took emergency crews to clear the roadways.

Through the generosity and services of general aviation, the state of Nebraska was able to find immediate relief in its time of need.

Airline Services Makes Major Events Possible

"Every time a College World Series game goes on TV, it just gives us another chance to promote ourselves to somebody who might be thinking about moving a business here, or moving themselves here for a career or just even coming here to visit."

David Brown
Omaha Chamber of Commerce

Every June, college baseball fans from around the country gather in Omaha, Nebraska to cheer on their favorite team at the College World Series (CWS). The event, held at TD Ameritrade Park, has created a stable impact on the local economy and continues to grow year after year. In 2019, a record 357,646 attendees over the course of 16 games brought an estimated $70 million in economic impact.

With almost 60 percent of attendees coming from out of state, aviation serves as a vital link for the event. Located less than four miles from the stadium, Eppley Airfield hosts thousands of out-of-state visitors who not only attend the CWS but visit other attractions in the area as well. This direct spending has led to growth that provides year-long support to the local economy.

In addition to visitor spending, media coverage during the CWS showcases Omaha on a platform that increases national exposure and provides long-term value for the entire state. This recognition has helped Omaha attract other sports events, including NCAA volleyball and basketball tournaments, Olympic swim trials, and the international equestrian World Cup in 2017.

As the College World Series continues to bring nationwide coverage of the state of Nebraska, aviation provides essential support for the economic impact of major events.

University of Nebraska at Kearney Aviation Program Filling Sky-High Demand for Pilots

Over the last five years, airlines across the country have been on the hunt for qualified pilots. To entice potential candidates, salaries for entry-level pilots have almost doubled and hiring incentives have increased. The aviation program at the University of Nebraska at Kearney is doing its part to fill this demand.

The school is one of only two in the state with an aviation program and currently has 60 enrolled students. Although it is on the smaller side, the program's director, Terry Gibbs, sees this as a strength as it creates a better learning environment. Gibbs, who has led the program since 2001, says it's one of the university's hidden gems. In addition to small class sizes, the school's rural location makes it an efficient place to train. With only one flight instructor on staff, they often partner with licensed instructors from Big Air, who are often alumni of the program.

> "There's a thrill with aviation. It's hard to describe. It's a fun feeling. It's an enjoyment. It's one of those things you can see yourself doing for a long time."
>
> **Jacob Barth**
> UNK Aviation Program Student

On campus, a Redbird Flight Simulator helps prepare students for a variety of different environments. Purchased in 2015, the simulator can create a range of flying conditions and can match controls for a variety of aircraft. The simulator has become an important tool for teaching students how to properly handle emergency situations like engine failure. With its realistic views and dual controls, students and instructors can record and replay flights for review.

Job placement for students is above 90 percent for pilots and is higher for students with certain certifications. Students graduate with around 250 flight hours and typically begin as flight instructors. Although the pilot demand is high, the aviation program at the University of Nebraska at Kearney is helping one flight hour at a time.

National Competition Fills Sky With Hot Air Balloons

Hot air balloons took to the sky in early August 2019 as the Old West Balloon Fest hosted the US Nationals Hot Air Balloon Championships of the Balloon Federation of America. 2019 was the fifth year for the festival and the first time the Balloon Federation of America brought its national competition to western Nebraska. The competition will also be held in the area for 2020 and 2021.

Hot air balloons are a unique part of aviation that create excitement and attract attention. Balloons have been around since 1783 and were the first successful flight technology with the ability to carry humans. More than six million spectators across the globe attend balloon events, making it more popular than any other outdoor summer activity.

> "My friend told me the area was great for flying so I should consider it. We competed against four other cities and were chosen because of the open flying area and the hospitality of the community."
>
> **Colleen Johnson**
> Old West Balloon Fest Executive Director

Johnson said that in past years, the Balloon Federation of American has done market surveys on the impact their event had in host communities. With pilots staying for an entire week, the event brings in an average of $1.2 million. "That's a lot for our community," Johnson said.

In the United States, balloon pilots must have a commercial pilot certificate to carry paying passengers and attend most balloon festivals. Those who are FAA certified can also act as hot air balloon flight instructors and can fly passenger sightseeing tours or corporate advertising balloons.

Physicians Utilize Airports to Provide Services Throughout the State

Through innovative treatments and technology, the staff at Bryan Heart are highly skilled with the drive to improve. Through their dedication to patients and families, their collaboration with healthcare providers throughout the region expands services, bringing value and pride in working together to change lives.

The Bryan Heart Health System is a Nebraska-governed, nonprofit health system that cares for patients that educates tomorrow's healthcare providers, motivates our community with fitness and health programs, and collaborates to continually improve how we serve others. The award-winning network of doctors, hospitals and medical providers ensure the highest quality of care and the most advanced, effective treatments for those they serve throughout the region. Through the statewide networks, Bryan Heart brings care and treatment directly to rural communities through sophisticated mobile diagnostic and treatment services, telemedicine services, specialized heart care clinics, telehealth mental health counseling and more.

With more than 5,000 highly trained staff members, Bryan Heart takes its commitment to provide the best care, the best education, the best wellness and recovery services, and the best work environment seriously.

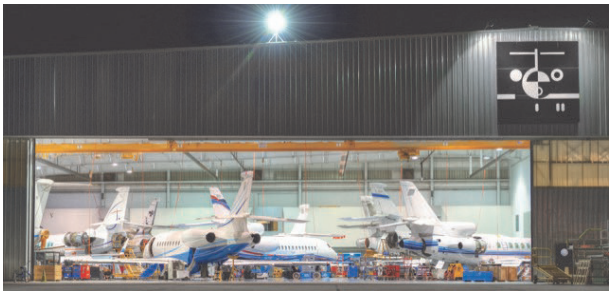
- **Bryan Heart physicians provide services in 42 communities across Nebraska, Iowa, Kansas, and Missouri**
- **Utilized airports in 22 communities in 2018 and 19 communities in 2019 to provide these services**
- **Approximately 30 percent of total patient visits provided in the year take place in Outreach locations, for a total of over 21,000 outreach patient visits**
- **Over half of provider clinic days occur in outreach locations**

Aviation Program in Sidney Offers FAA Training

For 50 years, Western Nebraska Community College's Sidney Campus (WNCC) has helped train a new generation of workforce in the aviation industry. Sidney Municipal Airport became home for WNCC Sidney Campus' Aviation Maintenance Program in 1997 and is the only FAA-approved program in the state of Nebraska. Through partnerships between the Airport Authority, Nebraska Department of Aeronautics, the community and WNCC, the airport has expanded its facilities including a terminal expansion and hangar construction over the last 20 years. WNCC's facility at the airport to accommodates the growing program that continues to train students to perform diagnostics on and repair single-engine, multi-engine, and corporate jet aircraft. More than half of their graduating students accept jobs at companies based in Nebraska while others take their skills to airports across the US and globally.

Facility Upgrades Bring New Business to Alma

Over the last several years, Alma Municipal Airport has experienced significant growth in terms of facilities and economics. In 2011, the airport installed a self-service fuel facility. A few years later in 2014, its 3,200-foot long turf runway was paved, and runway edge lights were installed. Shortly after that, several hangars were constructed. Since the 2014 facility improvements, fuel sales continue to grow and are triple what they were prior to Runway 17/35 being paved. With 40 years of aerial application experience, R Muckel Cropdusting decided to base its crop dusting operation at Alma Municipal after facility improvements were made in 2014. The company constructed a hangar and attached office area to allow it to provide aerial application services within a 50-mile radius of Alma serving southern Nebraska and northern Kansas.



Appendix D

Study Survey Templates and Poster

Commercial Service Air Passenger Survey

Commercial Service Air Passenger Survey

The State of Nebraska is conducting a study to measure the value of Nebraska airports to their communities and the the state. An important part of this study involves surveying airport users. **This survey is intended to gain an understanding of how air passengers visiting Nebraska contribute to the state's economy.**

Please take a few minutes to complete this survey. Your participation is deeply appreciated and crucial to the success of this study. **Your answers to these questions will be held in strict confidence.**

This survey is also available online at www.nebraskaaviationcounts.com/visitorssurvey

General

1. Please identify the airport where you received this survey: _____

_____

2. Are you a:
   Resident of Nebraska
   If resident: What is your zipcode?_____
   - ☐ Visitor to Nebraska?
   - ☐ Connecting Passenger?

3. How many people are traveling in your party?

_____

4. What is the purpose of your trip?
   - ☐ Business
   - ☐ Convention
   - ☐ Personal
   - ☐ Vacation

If your trip is business-related, please answer the following questions as applicable:

4a. What is the major product or service provided by your company?

_____

4b. What is the major product or service provided by the company you are visiting?

_____

If you are a visitor to the area, please complete questions 5 - 8

5. How many nights did you/will you spend in Nebraska during this trip?_____

Indicate type of lodging
- ☐ Commercial (e.g., hotel/motel, bed and breakfast, short-term rental)
- ☐ Private residence
- ☐ Camping

6. Approximately how much money did you, and/or will you spend during this trip? **List only those expenditures made in Nebraska and outsite the airport**

If traveling as a family or group, please estimate the total expenditures made by everyone.

Lodging $_____
Food/Beverage $_____
Local Transportation $_____
Entertainment $_____
Retail $_____
Other $_____

Please specify "other," as applicable:

_____

7. Does this spending apply only to you or to everyone in your party?
   - ☐ Just me
   - ☐ Everyone

8. How would your trip today have been affected if this airport was not available to you?
   - ☐ I would have flown to another airport.
     Name of airport:_____
   - ☐ I would have traveled by another mode (e.g., automobile, train, etc.)
     Please specify other alternative mode:
     _____
   - ☐ I would have used general aviation.
     Name of airport:_____
   - ☐ I would have visited a destination elsewhere in Nebraska
   - ☐ I would not have visited Nebraska

Please complete on reverse

Commercial Service Air Passenger Survey

Please use this space to include any additional comments or recommendations you may wish to bring to our attention regarding Nebraska's airports.

Fold Here (please tape closed)

GBA
10212 F Street
Omaha, NE 68127

GBA
Attn: Ed Young
10212 F Street
Omaha, NE 68127

Fold Here (please tape closed)

Thank you for your participation!
Should you have questions or concerns regarding this survey, please contact:
Ed Young, GBA
Phone: 913.577.8434
Email: eyoung@gbateam.com

Scan this QR code with your smartphone's camera to complete this survey online or visit
https://www.surveymonkey.com/r/TRJSRZW

NEBRASKA
Good Life. Great Journey.

General Aviation Visitor Survey

General Aviation Visitor Survey

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General

1. Please identify the airport where you received this survey: _____

2. Are you a:
   - ☐ Resident of Nebraska
   - ☐ Visitor to Nebraska

3. What is your zipcode?_____

4. Please give us the location of where your airplane is based _____

5. How many people (including the pilot) traveled or are traveling on your airplane? _____

6. What is the purpose of your trip?
   ☐ Business ☐ Personal

7. If a visitor, is Nebraska your destination?
   ☐ Yes ☐ No

8. How many times per year do you visit Nebraska?_____

If you are a visitor to the area, please complete questions 9 - 19

9. How many nights did you stay or are you planning to spend in Nebraska?_____

10. What type of lodging will or did you use (by # of nights)?

___Hotel/Motel
___Bed & Breakfast
___Short-term Residential (AirBnB, VRBO, etc.)
___Private Residence (Family/Friend)
___Camping

11. Approximately how much money did you, and/or will you spend during this trip? **List only those expenditures made in Nebraska and outsite the airport**

If traveling as a family or group, please estimate the total expenditures made by everyone.

Lodging $_____
Food/Beverage $_____
Local Transportation $_____
Entertainment $_____
Retail $_____
Other $_____

Please specify "other," as applicable: _____

12. Does this spending apply only to you or to everyone in your party?
   - ☐ Just me
   - ☐ Everyone

13. How would your trip today have been affected if this airport was not available to you?
   - ☐ I would have flown to another airport
   - ☐ I would have traveled by another mode of transportation
   - ☐ I would have visited another Nebraska destination
   - ☐ I would not have visited Nebraska

14. How does the availability of this or other Nebraska airports impact your personal or business interests in Nebraska? _____

Please complete on reverse

General Aviation Visitor Survey

15. Which airport would you have flown into if this airport was not available?

_____

16. What mode of transportation would you have used if this airport was not available?

- ☐ Automobile
- ☐ Train
- ☐ Bus
- ☐ Other (please specify) _____

17. What General Aviation airport would you have used if this airport was not available? _____

_____

18. What is the major product or service provided by your company? _____

_____

19. What is the major product or service of the company that you are visiting? _____

_____

Fold Here (please tape closed)

GBA
10212 F Street
Omaha, NE 68127

GBA
Attn: Ed Young
10212 F Street
Omaha, NE 68127

Fold Here (please tape closed)

Thank you for your participation!
Should you have questions or concerns regarding this survey, please contact:
Ed Young, GBA
Phone: 913.577.8434
Email: eyoung@gbateam.com

Scan this QR code with your smartphone's camera to complete this survey online or visit
https://www.surveymonkey.com/r/79QPGF2

NEBRASKA
Good Life. Great Journey.
DEPARTMENT OF TRANSPORTATION

Commercial Service and General Aviation Visitor Survey Poster

NEBRASKA
Good Life. Great Journey.
DEPARTMENT OF TRANSPORTATION

NEBRASKA Aviation COUNTS!

Have a minute?

Take our survey!

Option One

Scan me

Use your Android or iPhone camera to scan the QR code above and take the survey on your mobile device.

Option Two

Stop by the front desk to pick up a hard copy of the survey and get answers to any questions you may have.

Your participation is greatly appreciated!

Airport Tenant Survey

Tenant Survey

The Nebraska Department of Transportation (NDOT) launched a study to measure the economic value of Nebraska airports to their communities and to the state. This study's purpose is to collect information to help measure economic impacts of individual airports and the State's airport system. An important part of this study involves surveying airport management. The information provided in this survey will be used to prepare this analysis as well as quantify how airports impact Nebraska's economy.

(Please note: Responses will be aggregated and summarized, so no specific details will be reported.)

General

Airport Information

_____

Company Name

_____

Contact Name

_____

Telephone Number

_____

Email Address

_____

What area of aviation related activity best describes your company's activities at the airport?

- ❑ Air Transportation
- ❑ Air Ambulance
- ❑ FBO
- ❑ Aviation Relation Manufacturing / Repair
- ❑ General Manufacturing
- ❑ FAA
- ❑ Other Federal Government (Not Military or TSA)
- ❑ Military
- ❑ Local / Regional Government
- ❑ Local / Regional Police
- ❑ TSA
- ❑ Facility Maintenance
- ❑ Grounds Maintenance
- ❑ Security (Not TSA or Police)
- ❑ Construction
- ❑ Wholesale and Distribution
- ❑ Courier / Delivery Services
- ❑ Crop Spraying
- ❑ Flight Training
- ❑ Retail
- ❑ Restaurant (Food, Bar, etc.)
- ❑ Car Rental
- ❑ Ground Transportation (other than car rental)
- ❑ Hotel
- ❑ Firefighting and EMS
- ❑ Other

In 2018, how many employees are employed by your company?

Full Time _____

Part Time_____

Seasonal_____

Please report the total annual payroll (including wages and benefits) paid to all employees in 2017

_____

Will your total annual payroll increase in 2018, if so, by how much?

_____

If you pay local real estate taces directly to your locality, please provide the total amount of real estate taxes you paid in 2017.

_____

Please estimate the total capital improvements that your company invested in:

2018 _____

2017_____

2016_____

2015_____

Tenant Survey

Please comment on an additional economic benefits or services that your company provides to the local community.

_____

_____

_____

_____

What destination do your companies aircraft fly to?

_____

_____

Would you be willing to discuss how airports in Nebraska impact your business?

☐ Yes ☐ No

Fold Here (please tape closed)

GBA
10212 F Street
Omaha, NE 68127

GBA
Attn: Ed Young
10212 F Street
Omaha, NE 68127

Fold Here (please tape closed)

Thank you for your participation!
Should you have questions or concerns regarding this survey, please contact:
Ed Young, GBA
Phone: 913.577.8434
Email: eyoung@gbateam.com

Scan this QR code with your smartphone's camera to complete this survey online or visit
https://www.surveymonkey.com/r/TB8KKM8

NEBRASKA
Good Life. Great Journey.
DEPARTMENT OF TRANSPORTATION

Airport Manager Survey

Airport Manager

The Nebraska Department of Transportation (NDOT) launched a study to measure the economic value of Nebraska airports to their communities and to the state. This study's purpose is to collect information to help measure economic impacts of individual airports and the State's airport system. An important part of this study involves surveying airport management. The information provided in this survey will be used to prepare this analysis as well as quantify how airports impact Nebraska's economy.

(Please note: Responses will be aggregated and summarized, so no specific details will be reported.)

General

1. Airport Information_____

2. Contact Name_____

3. Telephone Number_____

4. Email Address_____

5. In 2018, how many employees were employed by the airport?

Full Time _____

Part Time_____

Contract Full Time_____

Contract Part Time_____

6. Was there change in employees from 2017 to 2018? If so, please explain.

_____

_____

7. In **2017**, how many employees were employed by the airport?

Full Time _____

Part Time_____

Contract Full Time_____

Contract Part Time_____

8. In **2017**, what were the annual wages and benefits paid to the employees reported?

_____

9. Please report how much capital improvements funds were invested in the airport, include all local, state, and Federal funds.

2018 _____

2017_____

2016_____

2015_____

10. Please complete a list of all FBOs, tenants, government agencies, and other businesses at your airport.

If you would prefer to send this information directly via email send to Ed Young (eyoung@gbateam.com) or via hard copy to 10212 F Street, Omaha, NE 68127.

Please include as much information as possible: company name, type of firm and contact person, mailing address, phone number, email address, number of full-time employees, number of part-time employees. If you have reports of gross revenues earned by tenants on the airport in 2017, please provide these. This information will be held in strict confidence. It will help expedite the study process by eliminating multiple requests to tenants to complete surveys and will help ensure accurate representation of economic contributions of your airport.

11. Other than those businesses listed in Question 10, please attach a list of businesses that base an aircraft at the airport. Please provide the company name, contact name, and number of employees of the business (if known).

Airport Manager Survey (cont.)

12. Please list all non-local businesses that frequently use the airport to access the surrounding communities.

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13. Please attach a list of local businesses that do not have an aircraft based at the airport, but frequently use the airport. Please provide the company name, contract name, and number of businesses if know.

_____

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14. Are any of the following studies or reports available?

- ☐ Master Plan
- ☐ Airport Economic Impact Study
- ☐ Airport Marketing Material
- ☐ Local or Regional Economic Impact Study
- ☐ Annual Report
- ☐ Sponsor Economic Impact Study

15. If your airport is co-located with a business or industrial park

Business Park Manager Name_____

Business Park Manager Email_____

Type of Business or Industrial Park_____

Number of Business Park Employees_____

16. Please report the number of operations (takeoff and landings) at your airport

2017 General Aviation_____

2017 Commercial Service_____

2018 General Aviation_____

2018 Commercial Service_____

17. Please estimate the percentage of general aviation operations at your airport that were businesses or individuals that traveled into the community for any reason, as opposed to simply purchasing fuel.

_____

18. This study is also concerned with the many quality-of-life benefits that airports provide, which are often not measured in monetary terms. Please check all applicable activities / activities that are typical, these can be occasional activities at your airport.

- ☐ Agricultural or Crop Spraying
- ☐ Ballooning
- ☐ Corporate / Business activity
- ☐ Traffic / News reporting
- ☐ Environmental
- ☐ Aerial photography / surveying
- ☐ Aerial inspection (pipeline, electrical)
- ☐ Aerial advertising
- ☐ Promotional activities (open houses, air shows, fly-ins)
- ☐ Aerial firefighting
- ☐ Military exercises / training
- ☐ Freight / cargo activity
- ☐ Shipping perishable goods
- ☐ Hunting
- ☐ Career training
- ☐ Search and Rescue
- ☐ Flight training
- ☐ Emergency medical aviation (air ambulance)
- ☐ Gateway for VIPs / High profile visitors
- ☐ Staging area for community events
- ☐ Police / Law enforcement
- ☐ Location for community facilities
- ☐ Public charters
- ☐ Preservation of open space
- ☐ Prisoner transport
- ☐ Parachuting
- ☐ Recreational flying
- ☐ Sport flying
- ☐ Sporting events
- ☐ Regional recreational activities (tourism)
- ☐ Visiting doctors / Medical clinics
- ☐ Other (please specify)

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_____

Airport Manager Survey (cont.)

19. Please provide a very brief description of the three most important items checked above. Please explain the activity and why it is important_____

_____

_____

_____

20. Please use the space below to discuss any special attribute of this airport or ways in which the airport is special or important to the community served. Please note if your airport sponsors any community events and identify other ways your airport benefits the local community or area businesses. Also discuss how the community has supported the airport, as applicable. If there are any available anecdotes, testimonials, or quotes that highlight the value of your airport to the community or local businesses, please provide them as well._____

_____

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21. Please check all surface modes of transportation available at your airport:

- ☐ Courtesy Car
- ☐ Bus
- ☐ Limousine Service
- ☐ Taxi Cab
- ☐ Rail
- ☐ Uber/Lyft
- ☐ Other (please specify)

_____

_____

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