

## Aviation, Aerospace and Defense Support Arizona

Arizona's 15 counties are home to 67 publicly owned, public-use airports that support the economic vitality and quality of life within the Grand Canyon State. These airports host commercial passenger service; world-class general aviation (GA) activities such as flight training, skydiving, and aerial tours; and air cargo while serving as regional job centers and economic engines in their communities. In addition to Arizona's airports, cutting-edge aerospace and defense companies and numerous United States (U.S.) military installations with a significant aviation-related component are in the state.

The 2021 Arizona Aviation Economic Impact Study (AEIS) commissioned by the Arizona Department of Transportation (ADOT) Aeronautics Group examines the impacts of these three vital aspects of aviation and aerospace in Arizona.

Together airports, aerospace manufacturing, and U.S. military installations contribute over \$121.4 billion to our economy every year—providing a foundation for Arizona's culture of growth, innovation, and economic prosperity.

### STATEWIDE ECONOMIC IMPACT **\$121.4 Billion**



## What is Economic Impact?

The 2021 Arizona AEIS measured how economic activity at the state's commercial service and GA airports stimulated the Arizona economy in 2019. Impacts are generated by airport administration and business tenant employees working on airport property, capital improvement spending, and the thousands of out-of-state and international visitors who fly to Arizona and bring new money into our economy. In turn, airport administration and on-airport business tenants purchase goods from suppliers (indirect impacts) and airport workers spend the money they earn (induced impacts), generating successive waves of economic impacts in Arizona.

The economic impacts of aerospace manufacturing and 59 Arizona airports were modeled by IHS Markit using IMPLAN (2019). Eight airports requested that their independently conducted studies be incorporated into the 2021 Arizona AEIS study results (2019). The impacts of military operations were obtained from the *Economic Impacts of Arizona's Principal Military Operations* commissioned by the Military Affairs Commission and prepared by The Maguire Company (2017).

For more details about the 2021 Arizona AEIS, including the full Technical Report, visit [azdot.gov/planning/airport-development/links-and-resources-airport-development](https://azdot.gov/planning/airport-development/links-and-resources-airport-development)

# ADOT

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## ARIZONA AVIATION ECONOMIC IMPACT STUDY

### Coconino County



Home of the Grand Canyon, Coconino County is the second-largest county in the U.S. in terms of land area. The county is mostly rural, containing several Native American communities including portions of the Navajo Nation and Hopi, Supai, and Hualapai reservations. The Flagstaff metropolitan area is the county's commercial hub and population center. Northern Arizona University (NAU) in central Flagstaff is the county's largest single employer. The health care and biomedical manufacturing sector employs more than 6,000 people and is one of the fastest-growing industries in the county.<sup>1</sup> Notable companies in this sector include W.L. Gore & Associates, the second-largest employer in the county. Coconino County also hosts Camp Navajo 10 miles west of Flagstaff, a military storage depot and training center operated by the Arizona Army National Guard.

Grand Canyon National Park is one of the Seven Natural Wonders of the World and annually attracts more than 5 million visitors from around the globe.<sup>2</sup> Other major natural attractions include Lake Powell, Horseshoe Bend, Havasu Falls, Antelope Canyon, and the Vermillion Cliffs. The San Francisco Peaks tower over Coconino County and include Humphreys Peak, the highest mountain in Arizona and home to the Arizona Snowbowl Resort. Numerous destinations are popular for hiking, sightseeing, fishing, boating, and biking in the summer and for snow sports in the winter. These attractions are supported by hotels, resorts, and restaurants which contribute to local, county, and statewide economies.

[1] Northern Arizona Council of Governments (2020).

[2] U.S. National Park Service (2021).

## County Demographics



Population  
**143,500**



Employment  
**55,692**

Source: U.S. Census Bureau (2019)

## Top Business Sectors



Accommodation & Food Services



Health Care & Social Assistance



Retail Trade

Congressional District  
**1**

Legislative Districts  
**6, 7**

## Did You Know?

Coconino County's three commercial service airports supported more than 410,000 passenger enplanements in 2019. Nearly 70 percent of these enplanements were attributed to aerial tours over the Grand Canyon, Lake Powell, and other scenic areas.

## STATEWIDE Economic Impacts of Arizona Airports



Jobs  
**386,058**



Earnings  
**\$20.4B**

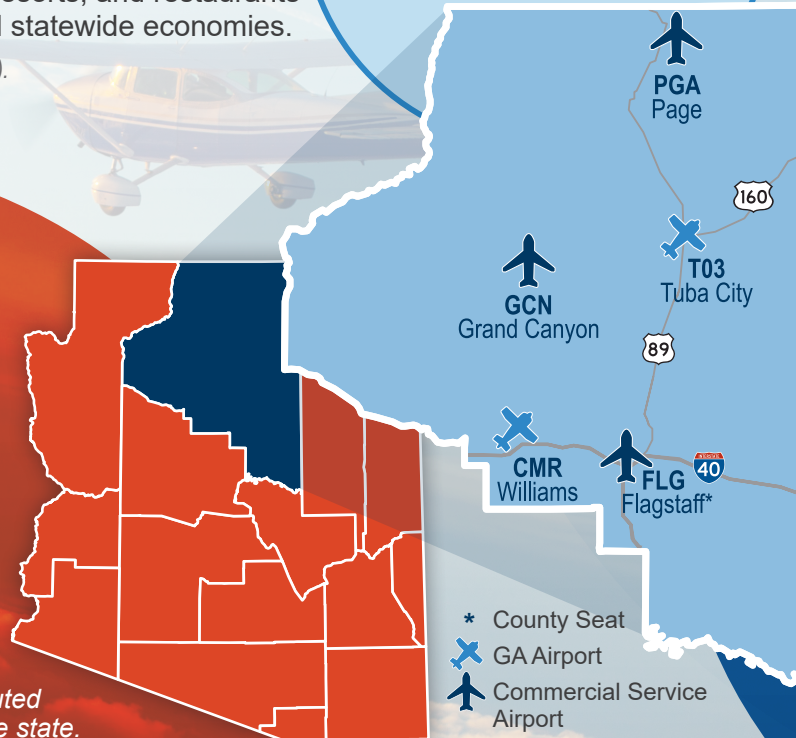


Economic Activity  
**\$59.4B**



Tax Impacts  
**\$3.5B**

Arizona's airports contributed  
**\$33.0B in value added to the state.**



## COCONINO COUNTY Economic Impacts of Airports



Jobs: **3,168**  
Number of full- and part-time persons employed



Earnings: **\$158.4M**  
Total compensation paid to workers including wages and benefits



Economic Activity (Output): **\$422.3M**  
Value of sales that occur in the Arizona economy that are ultimately attributable to airport activities



Tax Impacts: **\$24.6M**  
Airports' direct economic impacts result in local and state tax revenues.