



**STATESVILLE REGIONAL AIRPORT
ORGANIZATIONAL ASSESSMENT
&
MARKET ANALYSIS
FINAL TECHNICAL REPORT**

AUGUST 2016

FOR

THE CITY of
Statesville
NORTH CAROLINA

The cover page features a background image of an airport tarmac with a white aircraft and hangars. The text is overlaid on the right side of the page.

**Statesville Regional Airport (SVH)
ORGANIZATIONAL ASSESSMENT
&
MARKET ANALYSIS
Final Technical Report**

August 2016

PREPARED FOR:

The City of Statesville
301 S. Center Street
Statesville, North Carolina 28687



PREPARED BY:

Parrish & Partners of North Carolina, PLLC
1801 Stanley Road, Suite 150
Greensboro, NC 27407



ACCEPTED BY:

John Ferguson, AAE, Airport Manager

Larry Pressley, City Manager

City Councilman

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EXECUTIVE SUMMARY

In early 2015, the City of Statesville contracted with Parrish & Partners of North Carolina, PLLC to provide professional planning services for the preparation of both an Organizational Assessment, as well as a Strategic Market Analysis, for the Statesville Regional Airport (SVH) . Both efforts were driven by the vision and stated goals established by elected officials, key City staff and community leaders. Recognizing that the Airport is well positioned to capitalize on its exposure as a prime corporate general aviation airport in the Charlotte Metropolitan area with top notch infrastructure in place, the key objective of the study is two-fold: 1) ensure an organizational structure is in place with high caliber aviation leadership capable of advancing the Airport nationally, and 2) assess and evaluate the attractiveness of the Airport offerings along with the long-term vitality of the surrounding marketplace to determine key target markets and tenants for the Airport which will drive its future success. Ultimately, the findings, conclusions, and recommendations that resulted from the studies should serve as decision tools for the City to enhance organizational functions and focus on business growth at and around the Airport.

Organizational Assessment – Following a review of the roles and responsibilities of the City and the Fixed Base Operator at the Airport, along with the managerial organizational structure of the City, relative to the Airport, a series of findings and recommendations are made. A recent Airport Layout Plan Update projects a robust growth for SVH, and as such, the level of operations are projected to increase in size, number and complexity. The Airport's influence and role in the City and County should continue to escalate to one of economic significance. It will become more important that the roles and responsibilities associated with the day-to-day operations, maintenance and capital development ultimately shift to City personnel based at the Airport or in close proximity. This shift will permit the City to ensure a high degree of customer service, and adherence to operational and administrative standards. It's this very presence of on-site Airport staff augmented by FBO personnel who will promote customer orientation and services, thereby providing positive first impressions by the traveling public. These impressions are easily developed and changed, each and every time a patron visits the facilities; therefore, a high level of consistent appearance, offering of services, and overall customer welcoming that is crucial. All reception areas should be manned during all operating hours, all facilities should be kept in clean, fully operational order, signage and information should be readily visible, and common uniforms/attire should be worn to differentiate staff and portray a professional aviation-oriented environment. As a result of this supporting analysis, the City has subsequently moved forward, hiring a new professional, accredited airport executive, and streamlined the managerial structure within the City leadership to enable a

direct report of the Airport functions to the City Manager. Both initiatives are certain to serve the City and its Airport best as efforts to enhance the Airport facilities and its resident tenant list get underway.

Market Analysis – Analyses of the current and anticipated environment in and around the City of Statesville, the Airport itself, and the Charlotte metropolitan area, ultimately determines growth potential at the Airport and which market sectors may afford the best return on investment for the City and its airport tenants. The recommendations collectively serve as a framework for optimized Airport operations and focused marketing. The findings and recommendations are also supported through a methodical comparative analysis with other peer airports throughout the region. Not unlike the vast majority of other general aviation airports throughout the U.S. that operate on a non-profit basis, Statesville Regional Airport relies heavily revenues from operational fees (leasing, fuel flowage, and other handling activities), and is supported by state and federal grants in aid. Diversifying the mix of tenants and activities at the Airport will function to enhance Airport operating revenues, to elevate economic impacts (increased employment and taxes), and to afford the City/County citizens with improved access to the national airspace system, translating to dramatically improved global travel and commerce.

All indications point to strong growth potential for the Statesville Regional Airport and its surrounding areas. Population, per capita income and overall new business growth are projected to exceed North Carolina and U.S. averages in the coming 20 years. The proximity and overall influence of the greater Charlotte metropolitan region is and will continue to be a key driver. All of these items bolster the attractiveness of Iredell County and more specifically the City of Statesville. From an aeronautical perspective, the Airport's combination of top notch facilities and the availability of nearby large, rural tracts with excellent interstate access, will serve as an attractant to a diverse mix of corporate tenants of all sizes.

Given these tangible strengths and the many opportunities that lie ahead for the County, City and Airport, the following overview of recommendations provides key target areas to ensure positive growth objectives are achieved.

- **Administration & Operations:** 1) develop phased staffing plan, 2) assess changes to rates and charges, 3) evaluate future tenant lease language which better supports objectives, 4) review and update minimum standards to better orient to a corporate environment, 5) constantly monitor and update rules and regulations, 6) promote economic development partnering at every chance, 7) embrace charter and air carrier service interests, and 8) investigate an upgrade of Airport's FAA NPIAS designation to reliever status.

- Infrastructure: 1) provide first in class airfield facilities (runway, taxiways, navigational equipment, etc.), 2) provide thorough landside network of basing facilities and surface access points, 3) promote absolute safety and security across the entire Airport facility, 4) pursue facility enhancements that maintain existing assets, optimize efficiency, and enable expansion, and 5) support cost analysis which assess life-cycle values and sustainability.
- Community/Social: 1) protect the natural environment to the extent possible, 2) establish educational outreach programs for K-12 participation in aviation, and 3) establish and sponsor regular events at the Airport oriented toward aviation learning.
- Business/Marketing: 1) focus marketing efforts on target tenants throughout corporate America, 2) attend and exhibit at high visibility conferences offering the greatest exposure, 3) develop strategically targeted airport brochures and periodic newsletters to increase awareness, 4) create and manage a standalone airport website containing vital information, 5) engage in selective social media to broaden messaging, 6) collaborate continuously with Regional Economic Development and the Chamber of Commerce to leverage resources on pursuits, 7) proactively advertise regionally and nationally, and 8) develop promotional paraphernalia aimed at strategic audiences and conferences.

Chapter 1 - STRATEGIC VISIONING

1.1 INTRODUCTION

To aid in the preparation of goals and objectives for both the Airport Layout Plan/Narrative Report Update as well as the Organizational Assessment & Market Analysis, a workshop was conducted over the course of two sequential business days, and involved staff, elected officials, and key tenants. In sequential order, this workshop: reviewed the on-going task assignments by the consulting team and their schedules, touched on the purpose and desired outcome of the workshop, conducted a situational analysis or SWOT (strengths, weaknesses, opportunities and threats) analysis, held a visioning discussion, developed goals in collaborative groups, and refined objectives for the Statesville Regional Airport (SVH) and City.

Through these efforts, the participants and the Parrish and Partners of NC, PLLC consultant team became better aligned and focused on the overall direction for the Airport, how it should fit into the vision of the City to support economic development, and ultimately which specific goals and objectives were deemed paramount. The participants included the following individuals:

- Costi Kutteh, Mayor - City of Statesville
- Michael Johnson, City of Statesville Councilman (Mayor Pro-tem)
- Stephen Johnson, Iredell County Commissioner, Statesville Airport Commission Chairman
- C.O. "Jap" Johnson, City of Statesville Council Liaison
- Thomas Hazel, Statesville Flying Service
- Billy Shomaker, Lowes Aviation
- Michael Colyer, Champion Air
- Jonathan Moore, Champion Air
- Larry Pressley, City of Statesville City Manager
- David Currier, City of Statesville, Director of Planning

1.2 SWOT ANALYSIS

Following the completion of the visioning work session, an additional work session was convened to target a strengths, weaknesses, opportunities and threats (SWOT) analysis. The SWOT analysis would greatly aid pursuing overarching goals and objectives for the airport, thereby enabling the articulated vision to be attained in the planning horizon or sooner. The purpose of a SWOT analysis is to identify the key internal and external factors that are important to achieving those objectives. SWOT analysis groups key pieces of information into two main categories:

- Internal factors – The strengths and weaknesses internal to an organization/entity.
- External factors – The opportunities and threats presented by the external environment.

For attainable objectives, SWOTs are used as inputs to the creative generation of possible strategies by asking and answering each of the following four questions, many times:

- How can the organization use each strength?
- How can the organization stop each weakness?
- How can the organization exploit each opportunity?
- How can the organization defend against each threat?

A cross-functional team is best brought together to assess these aspects of an operation and represent a broad range of perspectives. In carrying out the SWOT analysis, the group was oriented to the following key operational aspects of the airport: infrastructure/facilities, services, airport management/staff, economic development, natural environment, financial, public safety and security, and many external factors (i.e., other airports, fuel prices, political climate, etc.). The following summarizes a listing of those elements believed to be important to the Airport as future goals and objectives are derived for the Organizational Assessment & Market Analysis, and the Airport Layout Plan/Narrative Report Update:

Strengths

- Condition of existing facilities
- Working relationship between City/County
- Financial support from City/County
- City/County collaboration
- City/County recognizing growth of tenants
- Outside CLT airspace
- Iredell County is rated as a Tier 3 county
- Strong vision supported by City government
- Financial strength of City/County
- Intersection of major interstates (I-40 & I-77)
- Traffic flow for tenant employees
- Available land surrounding existing airport property
- Rail nearby
- Intermodal at CLT (How do we transport from there to here?)
- Willingness of County/City to work together on land use
- City's customer service is good
- Long-term tenants that are familiar with each other
- Common vision for the need to hire a seasoned, professional airport manager
- Proximity (from a user-base perspective)
- Lowest combined tax rate in Charlotte area (also a weakness)
- Prior demonstrated willingness to offer tax incentives
- Adequate greenways
- Progressive view of recycling
- Regular airport maintenance of airfield (FOD check, lighting & striping verification)

- Precision & non-precision approaches
- Joint use agreement with nearby City Fire Department
- Existence of major tenant (Lowe's Aviation Department)

Weaknesses

- No avionics shop or deicing services
- The state/condition of the terminal building
- Lowest combined tax rate in Charlotte area (also a strength)
- Iredell County is rated as a Tier 3 county
- City/County staff without knowledge of airports
- Need stronger emphasis on environmental programs
- Terminal facilities and lack of office space
- Lack of office space internal to hangars
- Airport topography challenges
- Perimeter fencing issues (SW boundary is non-standard)
- Need more emphasis on infrastructure expansion (water, sewer)
- Lacking vacant land for hangar space (topo, lacking south-side parallel taxiway)
- RSA improvement project to ultimately resolve runway length issues
- Lack of full perimeter road
- Landside access to future expansion areas
- Potential water pressure issues
- Aging NAVAIDs
- NAVAID monitoring
- Access from the south (Old Mountain Road) to TWY F development areas
- Lack of south-side taxiway creates safety issue (crossing active runway to/from south)
- Access (Bethlehem Road) across RWY 10 approach end
- Lack of US Customs
- Marketing/Exposure

Opportunities

- Terminal facility improvements
- Availability of nearby properties for reasonable prices
- Regional freight & diversity/availability of area
- Hiring of full-time, professional airport manager
- Take advantage of cooperation between City/County and timing of national economic recovery

- Land now available for the full build-out of the south-side parallel taxiway
- Fill material is nearby and available, to support airfield and basing area development
- Development of non-scheduled service
- Improve marketing and exposure of the airport and its assets
- Sponsoring community events that promote the Airport
- Grow tenant base by capitalizing on new entrants and nearby airport tenants
- Availability of turbine aircraft hangar space
- Develop strategy plan and metrics to incrementally grow airport facilities and business
- Facilitate long-term partnership between the Airport, City and County
- Develop land use plan to protect the Airport from residential uses and provide height protection
- Determine if a need exists for a US Customs presence
- Ensure highest-and-best-use approach to future properties and tenants

Threats

- Airport does not have a wetland delineation plan
- Charlotte Non-Attainment Area and the probability it could encompass Statesville area
- Availability of major funding sources
- NC STI process, role of NCDOT Aeronautics, and influence of other regional projects
- Falling prey to implementing projects that are not supported by a sound business case
- Lack of continued continuity and commitment by City/County leadership, and how that impacts the Airport's goals and objectives

1.3 VISIONING DISCUSSION

During the conduct of the strategic visioning and goal setting session, participants received a briefing focused on the technical tasks associated with each scope of work for the Organizational Assessment & Market Analysis, and the Airport Layout Plan/Narrative Report Update, in an effort to support everyone's understanding of the projects, the issues, the approach to each study, and the desired outcome. Participants then engaged in establishing a future vision for the Airport, its goals and objectives, and various strategies to consider as the aviation industry and the local environment may change going forward.

From the outset, visions of the Airport's future were carefully considered and were developed only after seeking input from the participants through a brainstorming session. Together, these individuals contributed to the

following visions for the future of the Statesville Regional Airport (SVH) and the framework in which it rests within the City and County:

- Desire a strategic marketing plan for the Airport
- Better understand who, what, where the Airport is and how it compares to others
- Create a framework for the City and the County to extend infrastructure
- Continue improvement of facilities
- Ultimately, expansion at the Airport
- The plan should look beyond the airfield but have the airfield as the anchor
- Lengthened runway safety area would lead to more fuel purchased at SVH and increased revenue
- More comprehensive planning for industrial and commercial clients
- As the Airport grows, cater to Fortune 500 companies
- Determine other airports with superior services and compare
- Grow the Airport to capitalize on freight opportunities
- Airport ultimately needs to be diversified with many services, not just one
- Consider industrial sites off airport which would benefit the Airport
- Devise a way to protect the integrity of the Airport land uses
- Determine projects with the best return on investment (provide ultimate plan for County budgeting)
- Ensure that future expansion of the Airport does not impact the existing tenants
- Develop safe, full length runway based on sound justification
- Airport to be twice the economic driver than it is today
- Airport should focus on job creation

1.4 GOALS AND OBJECTIVES

Establishing a strategic business framework and long-range planning success largely depends on the effectiveness of established goals and objectives. Goals and objectives serve as the logical connection between the established airport vision and the end results, and performance necessary to continue Statesville's critical role in the greater Charlotte metropolitan area.

Traditionally, airport planning has a number of implicit goals that are adhered to throughout the planning process and the development of long range growth plans. More specific objectives evolve during the conduct of studies themselves. Specifically, this effort outlines detailed business and operational goals and objectives

that will be utilized throughout the Organizational Assessment & Market Analysis, and the Airport Layout Plan/Narrative Report Update, and will influence the findings and recommended developmental actions. The following list of goals and objectives were developed to provide overarching direction to both the Organizational Assessment & Market Analysis and the Airport Layout Plan/Narrative Report Update:

Goal No. 1 - Provide safe, reliable, efficient, and environmentally sensitive aviation infrastructure that meets present and future user/tenant needs.

Objectives:

- Plan infrastructure to accommodate anticipated growth in corporate/commercial aviation, industrial recruitment and other aviation businesses
- Ensure all plans consider potential impacts on existing and future tenants
- Provide for excellent infrastructure/facilities
- Develop plan to protect safety of travelers, employees, tenants, and public at airport while maximizing accessibility of existing facilities
- Ensure that all fencing and access points are safe and secure in accordance with FAA criteria
- Reduce potential for runway incursions
- Provide an adequate and safe operating environment for tenants and users, by protecting all existing and ultimate runway safety areas, runway protection zones, and runway approaches from incompatible land use and development
- Protect all FAR Part 77 imaginary surfaces associated with existing and planned facilities from incompatible objects
- Ensure that regular ongoing airport maintenance and inspections are conducted to address lighting, striping, pavement conditions, and NAVAIDs
- Implement and manage height hazard and noise (FAR Part 150) overlay zoning
- Institute green initiatives at the Airport to encourage recycling by tenants and users

Goal No. 2 - Ensure a viable strategy for long-term airport management continuity that serves a combined City/County vision.

Objectives:

- Develop clear processes and procedures surrounding policies and rules at the Airport
- Define a vetting process that ensures a viable plan

- Foster future collaborative coordination between City/County Economic Development and the Airport Manager
- Affect change to create the Airport is its own department within the City structure
- Maintain a collaborative City/County relationship
- Establish a management structure that focuses on client service and financial stability
- Develop a plan to expand awareness of the Airport's importance to the community and recruit airport ambassadors to convey the message

Goal No. 3 - Foster a socially responsible business environment which markets to a diverse set of "world-class" aeronautical and non-aeronautical companies to locate in Statesville and Iredell County.

Objectives:

- Devise a plan that sells "quality of life"
- Establish and manage a tax incentive base
- Preserve/protect/prioritize land uses on and in the vicinity of the Airport
- Drive a clear market vision
- Promote surrounding amenities (interstates, rail, lake, etc.) through marketing efforts

Goal No. 4 - Place a high priority on "return on investment" through each initiative's business case justification, thereby ensuring a financially self-sufficient airport operation.

Objectives:

- Enhance the current revenue streams
- Maintain a self-sustaining airport
- Maintain financial stability with a vision to future expansion
- Prioritize economic development expansion areas to assist in making the Airport a sustainable economic engine

Chapter 2 - AIRPORT ORGANIZATIONAL ASSESSMENT

General aviation airports in the United States have traditionally been operated by municipal or state governments, or by a public agency comprised of several jurisdictions. The nation's airports have historically functioned on a non-profit basis. Their operational funding is typically provided through "airside" (landing and handling fees, tie-down and storage fees, rentals, etc.) and "landside" (revenue derived from fueling concessions and other aviation and non-aviation leases) rates and charges. Typically, a large portion of capital program funding comes from the Federal Aviation Administration (FAA) and local State Department of Transportation in the form of grants.

However, over the last 20 years, this relatively easy to understand model has become ever more complex. First, many communities have acknowledged that not only do their airports represent a necessary transportation infrastructure, but also that the airport is a major contributor to jobs and positive economic impact to the communities they serve. Secondly, revenue and funding sources necessary to maintain and improve an airport have become more difficult to generate, understand, and manage. The industry is more competitive than ever before, making capital improvement and financial planning ever more challenging. For these and many other reasons, it is critically important to a community that the management of the local airport be viewed as a business, run as a business, and marketed as such. Highly qualified airport leadership is essential to guiding an airport's operation and growth, such that the overall community is afforded the economic benefits that may be derived from such an asset.

2.1 INTRODUCTION

In early 2015, the City of Statesville contracted with Parrish and Partners of North Carolina, PLLC to provide professional planning services for the preparation of both an Organizational Assessment, as well as a Strategic Market Analysis, for the Statesville Regional Airport. The Organizational Assessment is intended to embrace the vision and stated goals (see Chapter 1) of elected officials, key City staff and community leaders, through a systematic review and assessment of the current organizational structure for airport leadership, along with the overall operational environment, to determine possible changes or enhancements that will allow the stated vision to be realized and sustained. Ultimately, the recommendations that result from the assessment will serve as a decision tool for the City to enhance organizational functions and expectations going forward. If applicable, the assessment will recommend operational changes to the current organizational structure within city government, specifically focused on the Airport.

This assessment encompasses an overview of the airport administrative and organizational structures at the City of Statesville, and the Statesville Regional Airport with respect to other industry practices at airports of similar size and operational conditions. The intent of this effort is to provide Statesville with a baseline of information to establish context and options in evaluating its current organizational structure, and to provide City leadership the understanding of how the organization may be modified, if recommended. As a part of this chapter, alternatives are presented to help frame options for the Airport's administrative organization, followed by conclusions relative to recommended organizational change for the airport leadership structure and how it dovetails into the overall City structure.

Specifically, the assessment provides the detailed information through use of the following approach:

- Review of City administrative and organizational structure
- Review of Airport administrative and organizational structure
- Review of Airport organizational functions
- Overview of typical airport organizational structures
- Additional considerations
- Recommendations

2.2 CITY ADMINISTRATION

The City of Statesville is operated by a Council-Manager form of government. The City Council members serve part-time and are elected on a non-partisan basis by the citizens of Statesville. Under the council-manager form of government, the City Council acts as the legislative body in establishing policy and law. The City Council appoints a professional City Manager, who serves as the Council's chief advisor, and the City Manager appoints the employees of the City to manage and oversee various departments in the City structure. The City Manager handles the day-to-day management of the City organization. A Mayor is elected at-large (city-wide) for a four-year term and serves as the presiding officer at City Council meetings, and is also recognized as the official head of the City for ceremonial purposes.

Some policies and a number of government services offered within the City are implemented by Iredell County. Iredell County's governed by the County Board of Commissioners (the "Board"). The Board, consisting of five members (who are elected at-large on a partisan basis in even-numbered years; every two years, voters choose three board members, the member elected with the fewest number of votes is elected for a two-year term, and

the others are four-year terms), is responsible for formulating policy, directing a number of government services and appointing members of various boards and agencies to implement specific policies or to provide certain services.

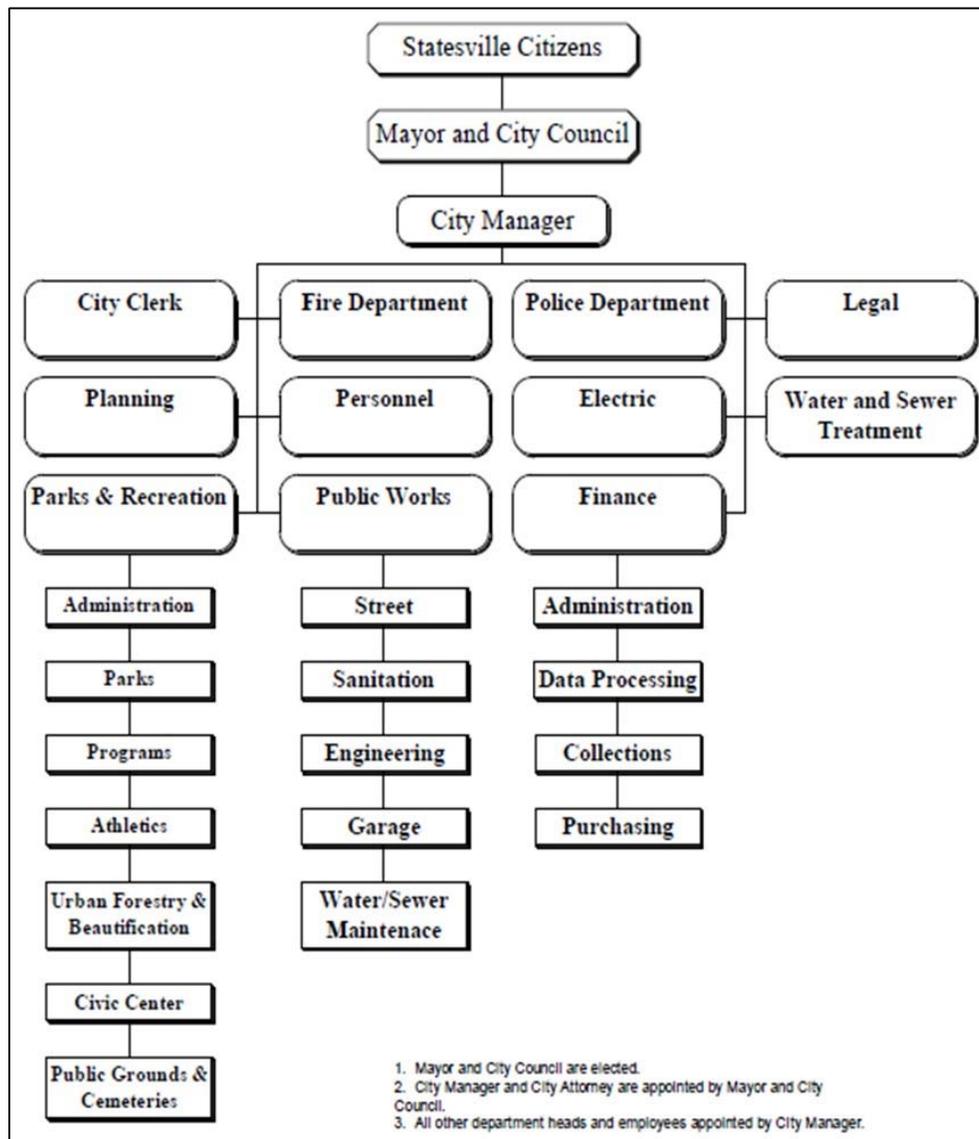
The City Manager oversees the operations of nine different City Departments (see below). Additionally, there are key support functions that also report to the City Manager, namely, Legal and the City Clerk. The City of Statesville's organizational structure is depicted in **Exhibit 2.1**.

- Human Resources
- Finance
- Fire Department
- Police Department
- Planning
- Public Works
- Water Resources
- Electric Utilities
- Parks & Recreation

2.3 AIRPORT ADMINISTRATION

An airport's organizational and administrative structure may vary greatly depending on its size, complexity, ownership, market focus, among other considerations. As an example, a large metropolitan area serviced by several airports meeting multiple aviation market demands may have one governmental body, or authority, overseeing all aviation operations at each facility, which would require one particular type of administrative structure (i.e., Los Angeles World Airports, Port Authority of New York & New Jersey, etc.). Conversely, airports run by cities or counties may operate as a separate department or within another department such as public works, economic development, transportation, or planning, which would require another type of structure. At the smallest level of airport ownership and operational management, it is not uncommon for the airport oversight and management to rest with the City or County Manager. In the case of Statesville, due to the Airport's size, number of tenants, and uniqueness of operations, the management of airport operations and oversight of capital development resides with the City Planning Department. The Director of Planning, among his other responsibilities noted in **Exhibit 2.2**, is supported by a direct reporting Airport Manager who has sole day-to-day responsibility of overseeing the airport organizational functions.

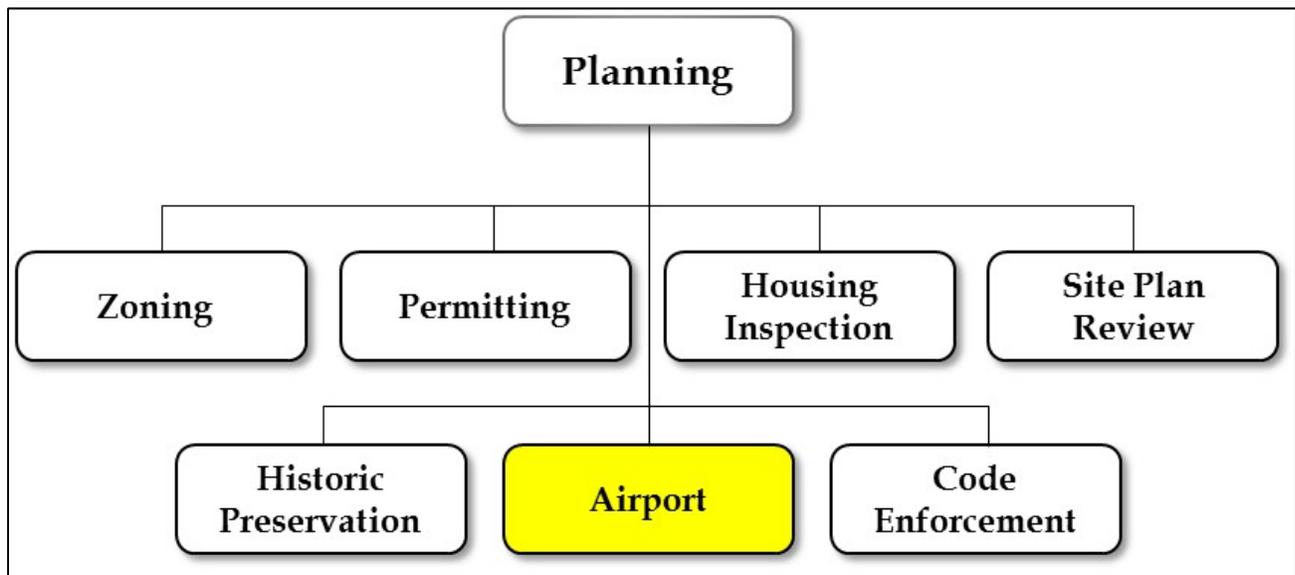
EXHIBIT 2.1: CITY OF STATESVILLE ORGANIZATIONAL STRUCTURE



Source: City of Statesville, 2014.

While there is no set standard or practice for a "typical" airport administration structure, there are some basic considerations that should be identified to provide a baseline of understanding. According to Airports Council International (ACI), most airports in the United States are public non-profit organizations, run directly or sponsored by government entities or government created authorities. Generally, there are six primary entities that encompass the sponsorship of all airports in the country designed to allow them to run as efficiently and effectively as possible. Following is a listing of these entities, as well as the percent of commercial service airports within the United States that employ each organizational model. According to ACI, airports are generally operated by one of these six entities:

1. City – 33% are city-operated
2. County – 15% are county-operated
3. State – 7% are state operated
4. Port Authority – 9% are port authority operated
5. Airport Authority – 30% are an airport authority operated
6. Other – 6% (Examples include: Dallas/Fort Worth, TX, which is the result of a contract between the two cities, or Monterrey, CA, which is operated by a special local tax district).

EXHIBIT 2.2: CITY OF STATESVILLE/PLANNING DEPARTMENT ORGANIZATIONAL STRUCTURE

Source: City of Statesville, Parrish and Partners of NC, PLLC, 2015.

2.4 ORGANIZATIONAL FUNCTIONS

Airport administrative structures are as diverse as the types of airports that they serve and are typically based on multiple factors, including staffing levels and organizational funding; airport operational types, markets and levels; airport sponsor requirements; and airport accountability requirements; among many others. Nevertheless, there are some basic roles and responsibilities that must be fulfilled at each airport regardless of size, whether by one person or a staff of many people.

The person charged with overseeing an airport can be identified by a variety of titles, including Airport Manager, Aviation Director, Airport Executive Director, CEO, President, etc. This person bears ultimate responsibility for

the day-to-day operations of the airport, and typically acts as the point-of-contact for the airport sponsor (City) in determining policy direction, and in the implementation of that policy through the airport organization.

2.4.1 Current City Functions

City organizational functions at Statesville Regional Airport consist of those to support airport managerial and operational tasks. The Airport is owned by the City of Statesville and therefore they have a responsibility for the operations, maintenance and daily upkeep of the airside and landside, in addition to the many other functional responsibilities outlined in the following paragraphs. Airport development and other issues are overseen by a nine-member Airport Commission that functions largely in a support and advisory capacity. The Commission is comprised of City Council appointees and other valued stakeholders. Routine duties may include coordination with the North Carolina Department of Transportation (NCDOT), the Federal Aviation Administration (FAA), and Iredell County officials.

Oftentimes at larger airports with larger staff, this person will have numerous and varying deputies, each with responsibilities regarding specific functions. At less complex airports which are city or county owned, some of these responsibilities may be shared with other city or county departments. A few examples of everyday tasks to support these functions include organizing and managing airport maintenance contracts such as lawn care and facilities management, the development and management of an operating budget, coordination and management of airport development projects, developing and overseeing an airport Capital Improvement Program (CIP), supervision of airport staff, maintaining good standing relations with existing airport tenants, and harboring an environment to attract new airport tenants. A description of typical airport functions/sub departments and their responsibilities is included below. Regardless of the number of employees on staff, these responsibilities must ultimately be addressed at every airport; albeit to varying degrees.

→ Legal

- Reviews all contracts and other agreements
- Represents the airport in any legal proceeding

→ Marketing and Public Affairs

- Markets the airport to users
- Handles press inquiries and publicizes airport activities

- Provides customer service and community relations
- Finance and Administration
 - Sets/monitors the annual budget
 - Monitors capital improvement plan
 - Prepares airport bond issues
 - Provides oversight of contractors
 - Provides accounting, purchasing, statistics and personnel services
- Engineering and Maintenance
 - Oversees all work done on the airport airfield, in the terminal and other airport properties
 - Provides building, vehicle and equipment maintenance
 - Maintains runways, taxiways and roads
- Operations
 - Ensures efficient operation of the airfield and terminal
 - Interfaces with federal agencies such as the FAA and Transportation Security Administration
 - Manages terminal and landside facilities and airside operations
 - Provides general planning oversight
- Safety and Security
 - Provides aircraft, rescue and firefighting services
 - Retains medical staff to respond to aircraft emergencies
 - Secures public areas of the airport

It is important to note that the performance requirements and implications for these functions tend to vary directly with a given airport's type and level of aviation activity. As such, larger, busier, and higher profile airports (primarily commercial service airports) oftentimes have larger staffs to accommodate those larger demands; whereas, small airports tend to have smaller demands attached to each of these requirements. Therefore, large commercial service airports will often have significantly larger staffs and associated organizational structures, while a small general aviation airport may have nothing more than a single airport manager to fulfill all of those requirements.

2.4.2 FBO Functions

Fixed-Base Operators (FBO) are comprised of businesses on the airport that provide a variety of aeronautical services, typically catering to the General Aviation (GA) community. These services can

include aircraft fueling (either full-service in which an on-site employee pumps the fuel for you or self-service in which you pump your own fuel). The FBO, Statesville Flying Service (SFS), provides full-service for both 100LL Aviation Gasoline (AVGAS) and Jet A fuel for \$4.58 and \$4.47, respectively, as of April 22, 2015 (\$4.68 for 100LL and \$3.97 for Jet-A, updated as of May 2016). The FBO is currently not operational 24/7, which is typical of operations at airports the size of Statesville; posted hours are 6:00 am – 9:00 pm, M-F, and 8:00 am – 9:00 pm, Sat and Sun. Flight instruction and aircraft rental is available, which may include a variety of aircraft types such as single-engine, multi-engine, and complex aircraft. Aircraft parking is available in the form of tie-down spaces or conventional-style hangars. Some FBO's are part of larger, nationwide chains that can be found at airports across the country. Other FBO's are independently owned and unique to a specific airport, like Statesville Flying Service at SVH. Based on research of social media and posted comments, the FBO focuses on providing quality service to all its customers and is available during off hour periods for service, provided advance notice is provided. It should be noted that although SFS provides AVGAS and Jet-A full-service fueling, a significant portion of the fuel flowage at SFS is self-performed by most of the larger corporate tenants on the field, resulting from their individual on-site fuel storage facilities. FBOs rely heavily on the fueling of aircraft, in particular larger aircraft that carry and utilize substantially more fuel due to their normal flight ranges. This lack of added revenue undoubtedly impacts the ability of SFS to supplement current services with more customary corporate services, to upgrade the existing terminal facilities, and to adequately maintain all facilities under their purview.

The FBO can be housed in a GA airport's main terminal building, as is the case at SVH, or may be located within a separate standalone facility, as is the case at larger air carrier airports where GA operations are separated from commercial operations. Also, more than one FBO may exist on an airport property; however, in the case of SVH with its level of flight activity, the number of based aircraft and specifically the reduction in Jet A fueling as noted above, a second FBO at SVH is most likely not financially feasible.

2.5 ADDITIONAL CONSIDERATIONS

Historically at SVH, the day-to-day operations and maintenance of the airside and landside facilities has been a sometimes shared responsibility between the City and the FBO, Statesville Flying Service. This mutual sharing of duties has most likely resulted through years of trusted relationships, the absence of dedicated airport management professionals on the part of the City, and the slow but steady growth in activity, tenants, based aircraft and transient corporate business. Examples of these shared duties may include maintenance of airfield

lighting and navigational aids, elimination of foreign object debris (FOD) from aircraft operational areas, routine maintenance of the terminal facilities, coordinated issuances of notices-to-airmen (NOTAMs), and limited escorting of contractors within the airport operations area.

2.6 RECOMMENDATIONS

As the operations at SVH continue to increase in size, number and complexity, and as the Airport's influence and role in the City and County continue to escalate to one of economic significance, the roles and responsibilities associated with the day-to-day operations, maintenance and capital development should ultimately shift to City personnel based at the Airport or in close proximity. This shift addresses risks associated with liability, but more importantly also allows the City to ensure a high degree of customer service, and adherence to operational and administrative standards. Additionally, oftentimes Airport staff on-site along with FBO customer orientation and services provided are the first impressions that the traveling public experiences. These impressions are easily developed and changed, each and every time a visit to the facilities is made. For these reasons, a high level of consistent appearance, offering of services, and overall customer welcoming and service is crucial. All reception desks should be manned during all operating hours, all facilities should be kept in clean, fully operational order, signage and information should be readily visible, and common uniforms/attire should be worn to differentiate staff and portray a professional aviation-oriented environment.

Chapter 3 - ORGANIZATIONAL ALTERNATIVES

As a result of needing to be more responsive to changes in both the aviation industry as well as the business community, many airport sponsors have sought ways to organizationally position their airports to be as responsive to the free marketplace as possible, and to be able to drive a customer service oriented business model. This often includes assessing and changing their airport governance model, and finding ways to attract highly qualified airport professionals that possess the skills necessary to manage today's complex airport operating environment. This section will present the types of governance models in use today and review the operational models that have been found to be successful in the United States.

3.1 INTRODUCTION

Nationally, airports are typically operated in one of three governmental settings, which include the following:

- Direct operation by a government;
- Operation by government with policy oversight advice by commissions, advisory boards, or authorities; and
- Through contract operation.

For the purposes of this assessment, these models are referred to as the Government, Policy Oversight, and Privatization Models, respectively. The Government Model, which tends to lack public policy input on a regular basis, is generally used by municipalities that operate only smaller general aviation facilities. The Policy Oversight Model is by far the most popular model followed by many airport owners today. The governance of Statesville Regional Airport (SVH) in reality closely mirrors that of the Policy Oversight Model; whereas, the Airport Commission functions in strictly a policy oversight and advisory capacity. The Privatization Model usually involves the outsourcing of day-to-day management and operations of an airport, but the municipality often retains policy control. This model is practiced at only a handful of airports nationally with mixed results; however, internationally it is seen more frequently.

3.2 VARIOUS ORGANIZATIONAL STRUCTURES

Beyond the airport's governance model, it's important to understand airport management's role relative to the airport organization structure that is employed on a daily basis. Like governance models, the organizational

structure of an airport department or office to manage airport operations also comes in many forms. The specific structure chiefly depends on the size and type of airport being managed. As an airport grows in size and complexity, so too does the need to provide greater departmentalization with more specialized roles and responsibilities for personnel. However, it must be recognized that each organization must be tailored to meet the needs of operating a specific airport in an efficient, effective, safe and secure manner. Generally speaking, airports like corporations, are organized utilizing the following structures:

- Simple or Line – a simple or line organization follows a top-down structure with the airport manager overseeing all employees. This structure is usually seen at smaller general aviation and commercial service airports.
- Functional – a functional organization orients activities around the types of tasks being conducted at the airport. For example, tasks or work activities would be grouped by division as in the Administration Division, Operations Division, etc. This structure is usually seen at larger airports, while smaller airports sometimes utilize a mix of functional and simple organizations.
- Departmental – a divisional organization has self-contained units that typically operate independently of each other. This type of structure is usually seen in a municipal environment with the airport being its own department within the overall structure of the municipal system. For example, Airport Department, Parks and Recreation Department, Public Works Department, etc.
- Conglomerate – a conglomerate organization structures activities around independent business units with their own cost centers. For example, General Electric is organized in a conglomerate manner with numerous independent businesses. This type of organization is not usually seen in the airport environment.
- Matrix – a matrix type organization utilizes a functional type structure that encompasses a project type approach. For example, an operations officer would functionally report to the Operations Department/Division while being a member of the project team for a new terminal with the role of providing operations insight while the terminal project is being designed and built. While this type of structure creates multiple reporting lines, it does provide flexibility to an airport that is growing or redeveloping.

Overall, several of these organizational structures are commonplace in the aviation industry, and it's not surprising to see a blend of multiple structures, particularly at airports that are experiencing growth. In the case of Statesville, the airport organizational structure follows a "Simple/Line" structure, reporting up through the Planning Department, on to the City Manager. As the City contemplates positioning the Airport and its

leadership for growth in activity and corporate business, consideration should be given to other organizational structures, including a hybrid structure that evolves over time. The following subsections will present a number of options available to City leadership and briefly discuss the obvious advantages and disadvantages of each.

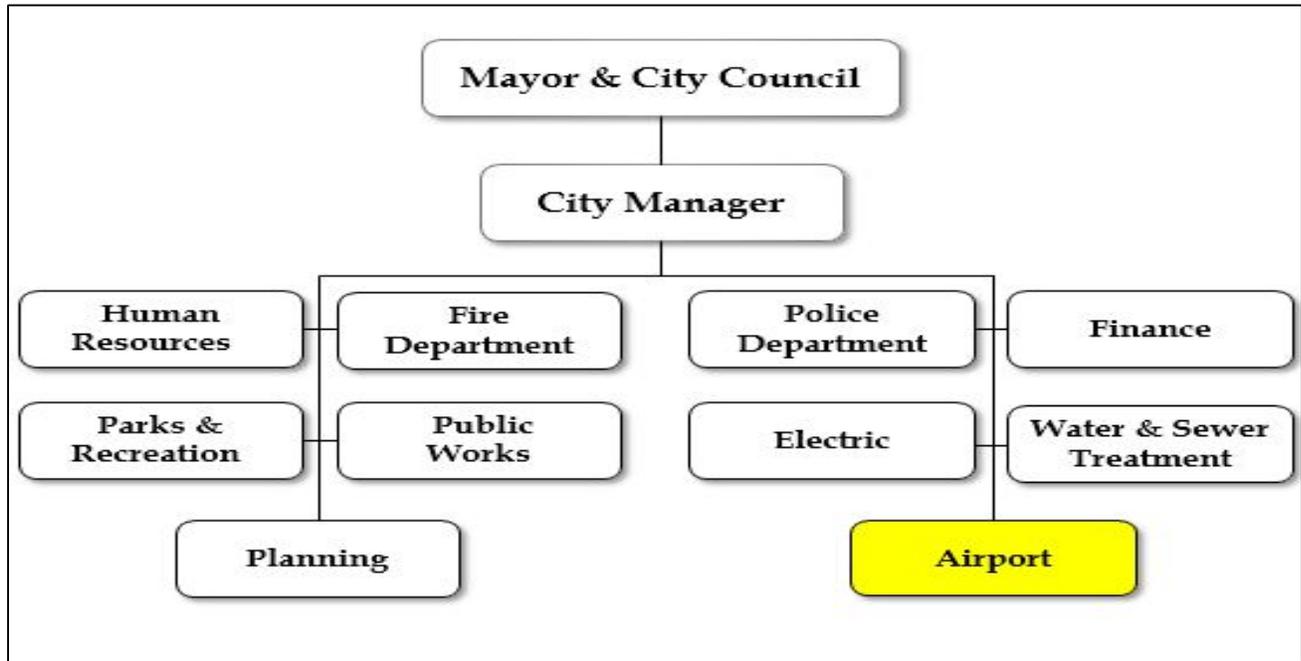
3.3 NO ACTION/CHANGE

As noted, at the time of this analysis the current Simple/Line organizational structure for airport management reports up through the Planning Department, which reports directly to the City Manager. Maintaining this structure advancing forward will continue to afford the Airport Manager direct access to planner support when dealing with zoning, permitting, and site plan reviews. The ability to grow staff at the Airport to assume full day-to-day operational responsibilities from the FBO will require stringent justification. Further, the ability to access other peer department leadership directly to solicit support on an as-needed basis will require bridging numerous lines of communication, creating a level of inefficiency and redundancy. Most importantly, given the City's aspirations relative to the future role of the Airport in supporting corporate business and overall economic growth in and around Statesville, expectations of the airport leadership position will be such that the City should want an accredited airport executive in the position. This executive should ideally be well versed in day-to-day management of staff, airport operations, growth strategies, capital development (planning, environmental, design and construction activities), marketing, and negotiations. This position may become very challenged, distracted and possibly disgruntled in the current Simple/Line structure.

3.4 MODIFIED STRUCTURE

For the challenges highlighted with the current organizational structure, a transition away from the Simple/Line structure to a more robust and growth oriented structure that initially supports a Departmental structure will afford the airport leadership with substantial flexibility to execute on stated goals and objectives. This structure would create a separate Airport Department reporting directly to the City Manager position, and would afford airport leadership with direct access to all of the other nine departments in the City, such as Human Resources, Finance, and Public Works. This shift would free the Planning Director of these coordination tasks and allow them to focus on the City planning tasks. As the Airport grows in complexity, this structure can easily shift to a functional department. A structure of this type establishes a framework for staff growth, permits performance metrics to be established easily for the Airport Department, and provides airport leadership with a great deal of autonomy along with the challenges of fostering a self-sufficient operation. **Exhibit 3.1** provides a cursory illustration of this modified structure.

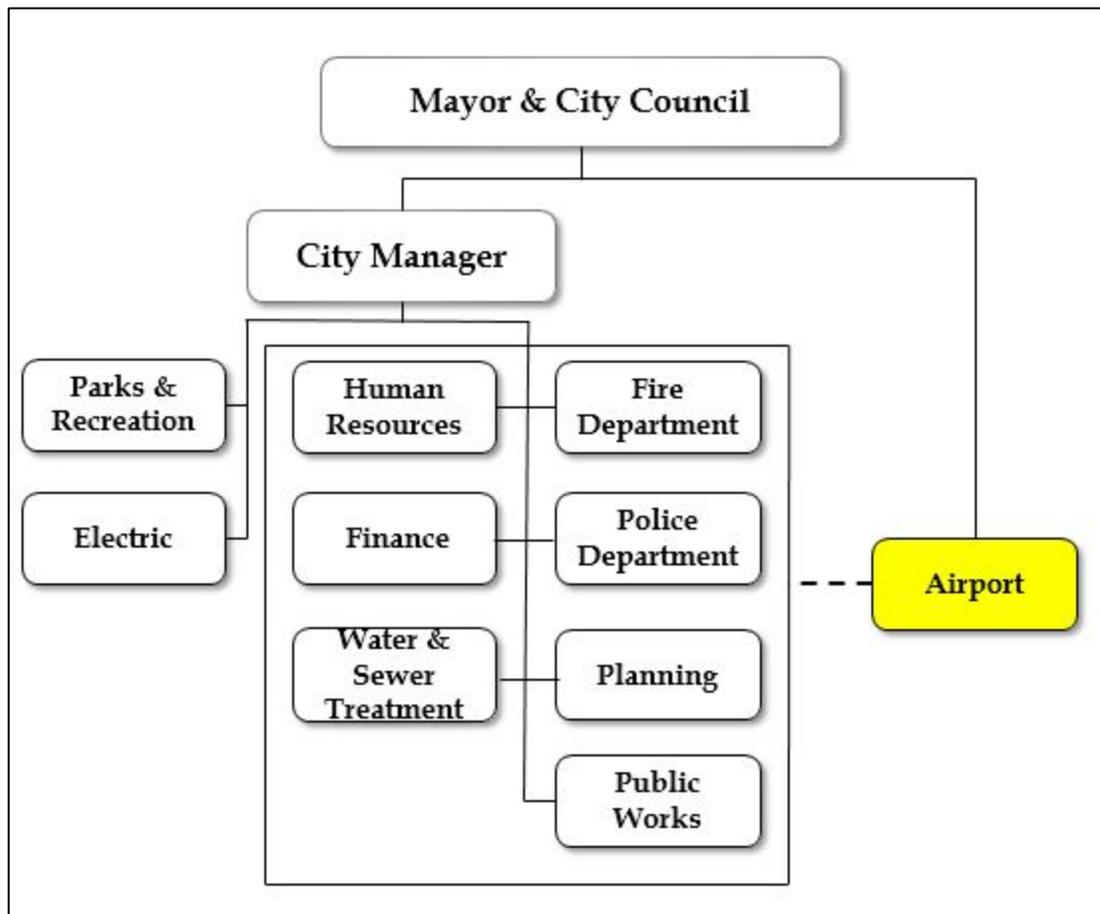
EXHIBIT 3.1: MODIFIED STRUCTURE – AIRPORT AS OWN DEPARTMENT



Source: Parrish and Partners of NC, PLLC, 2015.

3.5 COMPLETE RESTRUCTURING

In a similar fashion presented in the modified structure in the previous subsection, the challenges highlighted in Section 3.3 may also be improved or largely solved by also considering a full-scale restructuring of the reporting logic for the Airport and its leadership. Given that the Airport must be treated as its own enterprise fund, and that income and funding related to the Airport must remain at the Airport in accordance with FAA policies and grant assurances, some larger city government organizations create cabinet positions for key executive staff. This organization method would restructure the City's staff, such that the airport leadership is shifted into a peer position to that of the City Manager, thereby reporting directly to the Mayor and City Council. This structure provides airport leadership with ultimate decision-making ability and direct access to policy makers. Conversely, this may also create more challenging communication protocols for accessing the current nine departments reporting to the City Manager. The result could be less efficient work execution, redundant work activities, and possible miscommunication. This organization structure is typical in larger city governments involving larger commercial service airports or a system of airports. **Exhibit 3.2** illustrates this full-scale structuring for the Airport's chain-of-command.

EXHIBIT 3.2: RESTRUCTURING – AIRPORT AS SEPARATE ENTERPRISE

Source: City of Statesville, Parrish and Partners, LLC. 2015.

3.6 RECOMMENDATIONS

Based on the stated City and Airport vision, goals and objectives outlined in Chapter 1 of this assessment, combined with the strong growth potential facing Iredell County, the City of Statesville and SVH, it is strongly recommended that the City modify the organizational and reporting structure for airport leadership by adopting a Departmental organization. The modified structure will also enable airport leadership to unilaterally develop action items and performance metrics that are aligned to the stated goals and objectives, and can be held closely accountable for their activities by the City Manager. Coordination and collaboration with the other respective departments will become essential to successfully accomplishing many of these objectives ahead of schedule. As of the Final Technical Report phase in August 2016, the recommendations made herein were initiated and successfully adhered to in 2016. In doing so, the City hired a professional airport manager and adjusted the reporting structure of the Airport department and its manager, so that direct reporting to the City Manager takes place. The new structure will be highlighted in the conclusions section of this Study.

Provided the Airport experiences robust growth in activity and airport leadership is successful in luring new corporate aeronautical and non-aeronautical to the Airport and the City/County, it is highly likely that additional support staff will be required by the Airport Director, namely an Administrative Coordinator, an Operations and Maintenance Manager, and a Facilities and Capital Development Manager. The Departmental organization will allow an eventual shift to a Functional organization which will provide the City and airport leadership with an expandable structure that enhances efficiency of operations management, communications, and collaborative marketing.

Chapter 4 - MARKET ANALYSIS

4.1 INTRODUCTION

Consistent with this assessment, analyses of the current and anticipated environment in and around the City of Statesville, Statesville Regional Airport (SVH) itself, and the Charlotte metropolitan area, shall determine the growth potential at the Airport and the market sectors that afford the best return on investment for both the City and its airport tenants. Ultimately, the recommendations that result from this study shall collectively serve as a framework for the optimized operation of SVH and the focused marketing of the facilities going forward. The study shall articulate technical findings associated with the market analysis, comparative evaluations of other comparable airports, recommended operational changes based on a review and assessment of the current organizational structure within city government, specifically focused on the Airport. General aviation (GA) airports in the United States have traditionally been operated by municipal or state governments, or by a public agency comprised of several jurisdictions. The nation's airports have historically functioned on a non-profit basis. Their operational funding is typically provided through "airside" operations (landing and handling fees).

4.2 AIRPORT COMPARATIVE ANALYSIS

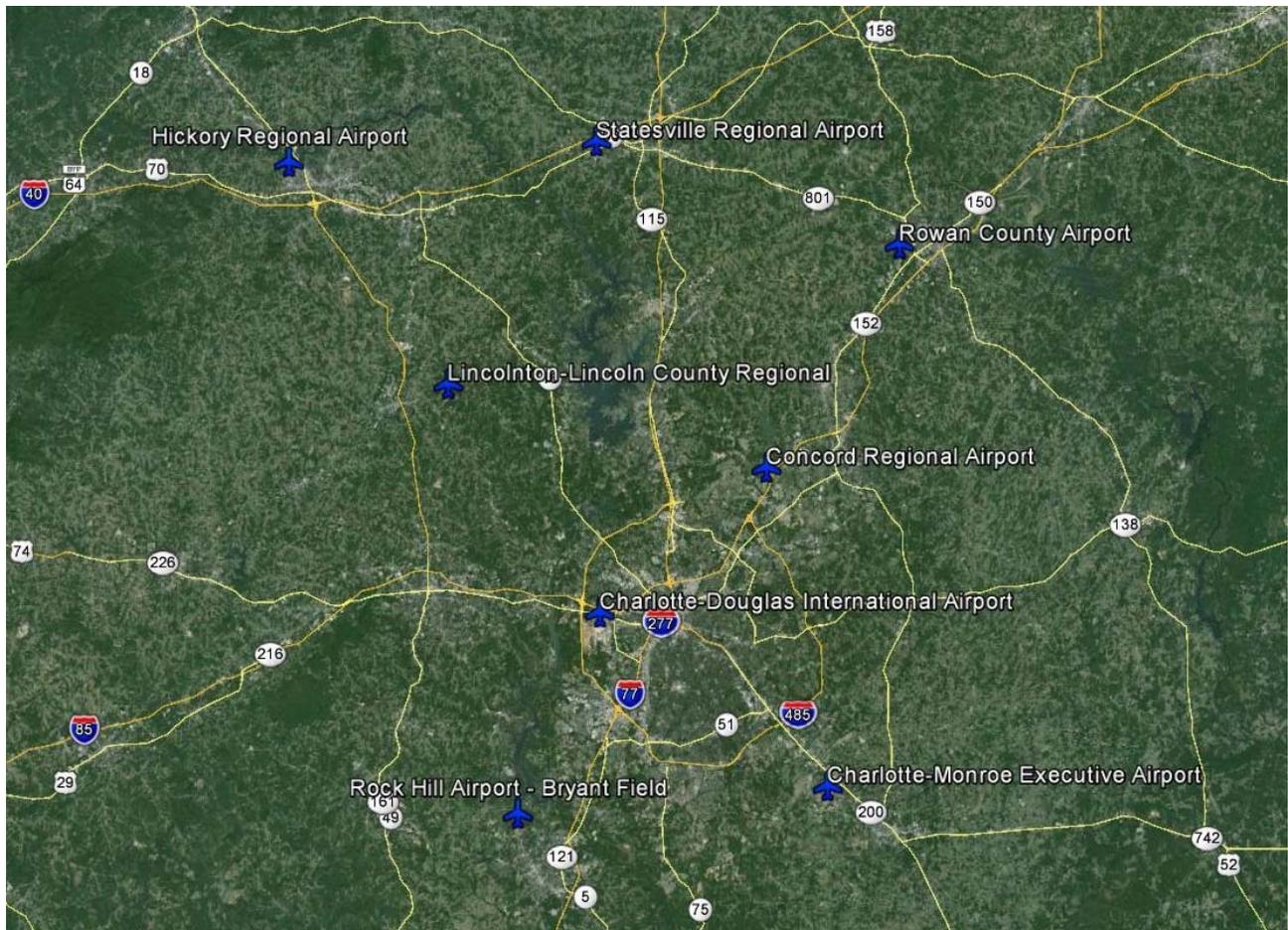
As part of the market analysis, six airports were compared to SVH. The comparative analysis was categorized into five comparative categories. These categories include: each airport's organization and its role in the National Plan of Integrated Airport Systems (NPIAS), a discussion of the services available at each airport and any on-site Fixed Base Operator(s) (FBO), airside facilities and airspace, landside facilities and access, and airport traffic data. The six airports that were included in the comparative analysis are listed below. Also noted is approximate shortest drive distance each airport is located from SVH.

→ Charlotte-Douglas International Airport (CLT)	49.1 mi from SVH
→ Smith-Reynolds Airport (INT)	52.9 mi from SVH
→ Charlotte-Monroe Executive Airport (EQY);	70.4 mi from SVH
→ Concord Regional Airport (JQF);	42.9 mi from SVH
→ Rock Hill/York County-Bryant Field (UZA);	69.4 mi from SVH
→ Rowan County Airport (RUQ);	31.2 mi from SVH

- ➔ Lincolnton-Lincoln County Regional Airport (IPJ); 33.0 mi from SVH
- ➔ Hickory Regional Airport (HKY); 31.4 mi from SVH

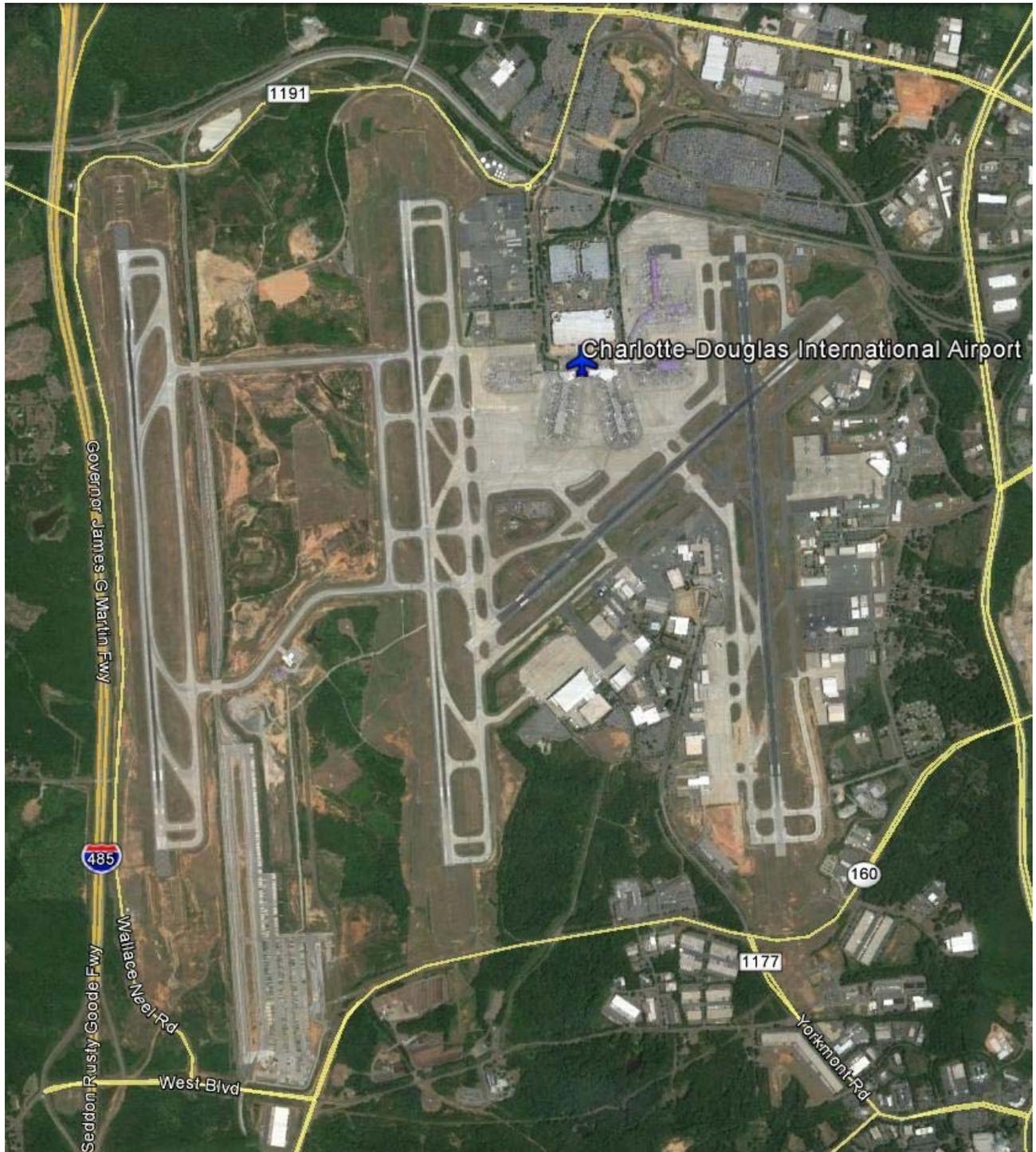
Exhibit 4.1 depicts the greater Charlotte metropolitan area with each of the comparison airports located (note, the Smith-Reynolds Airport lies outside the Charlotte metropolitan area approximately 53 miles northeast near Winston-Salem, NC). More detailed aerial imagery depicting each airport's facilities, the surrounding roadway network, and adjacent commercial/industrial development, is presented in **Exhibits 4.2 through 4.9**. Later in this section, pertinent area land use and zoning will be addressed.

EXHIBIT 4.1: AERIAL IMAGERY, CHARLOTTE METROPOLITAN AREA



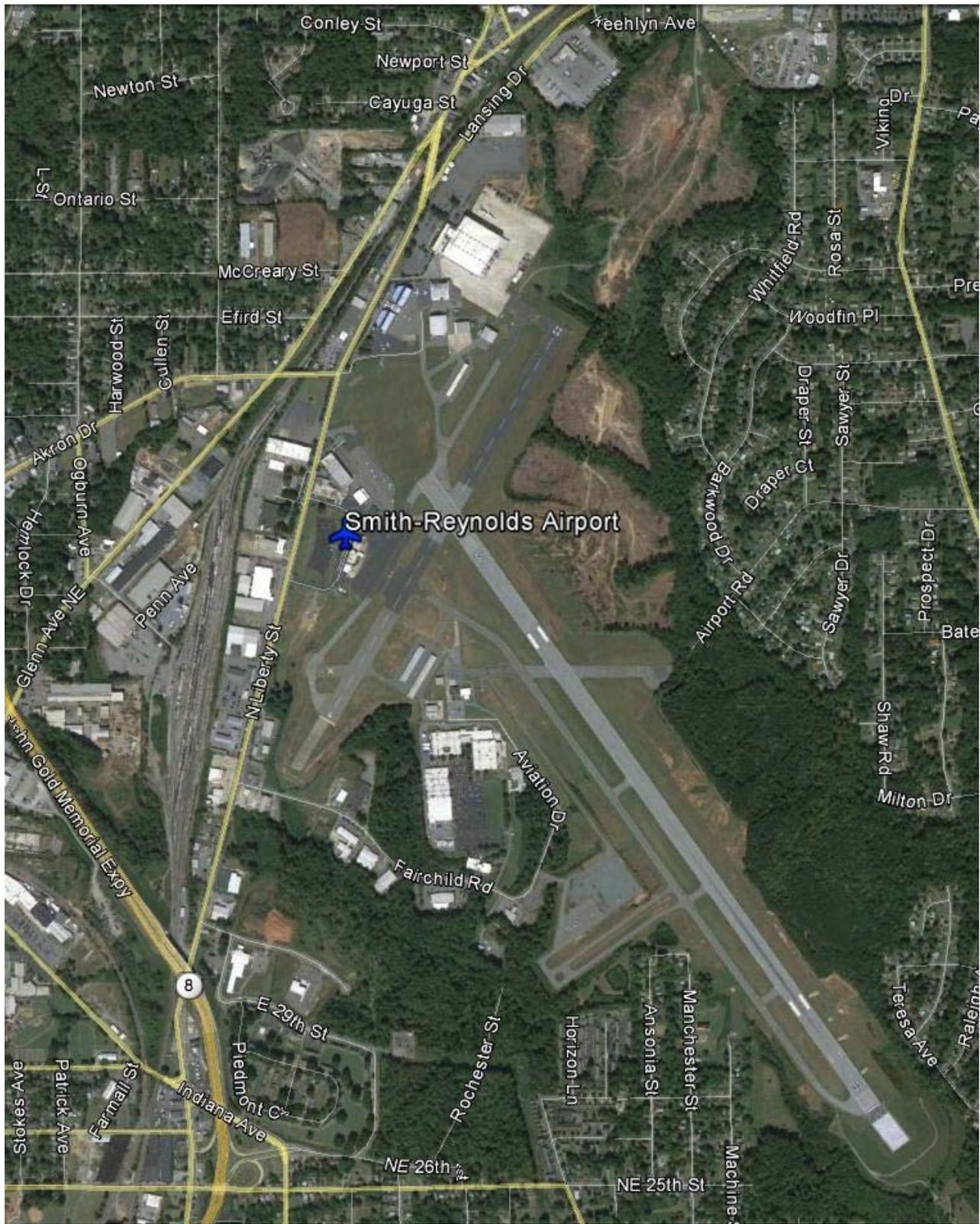
Source: Google Earth/Parrish and Partners of NC, PLLC, 2016.

EXHIBIT 4.2: AERIAL IMAGERY, CHARLOTTE-DOUGLAS INTERNATIONAL AIRPORT (CLT)



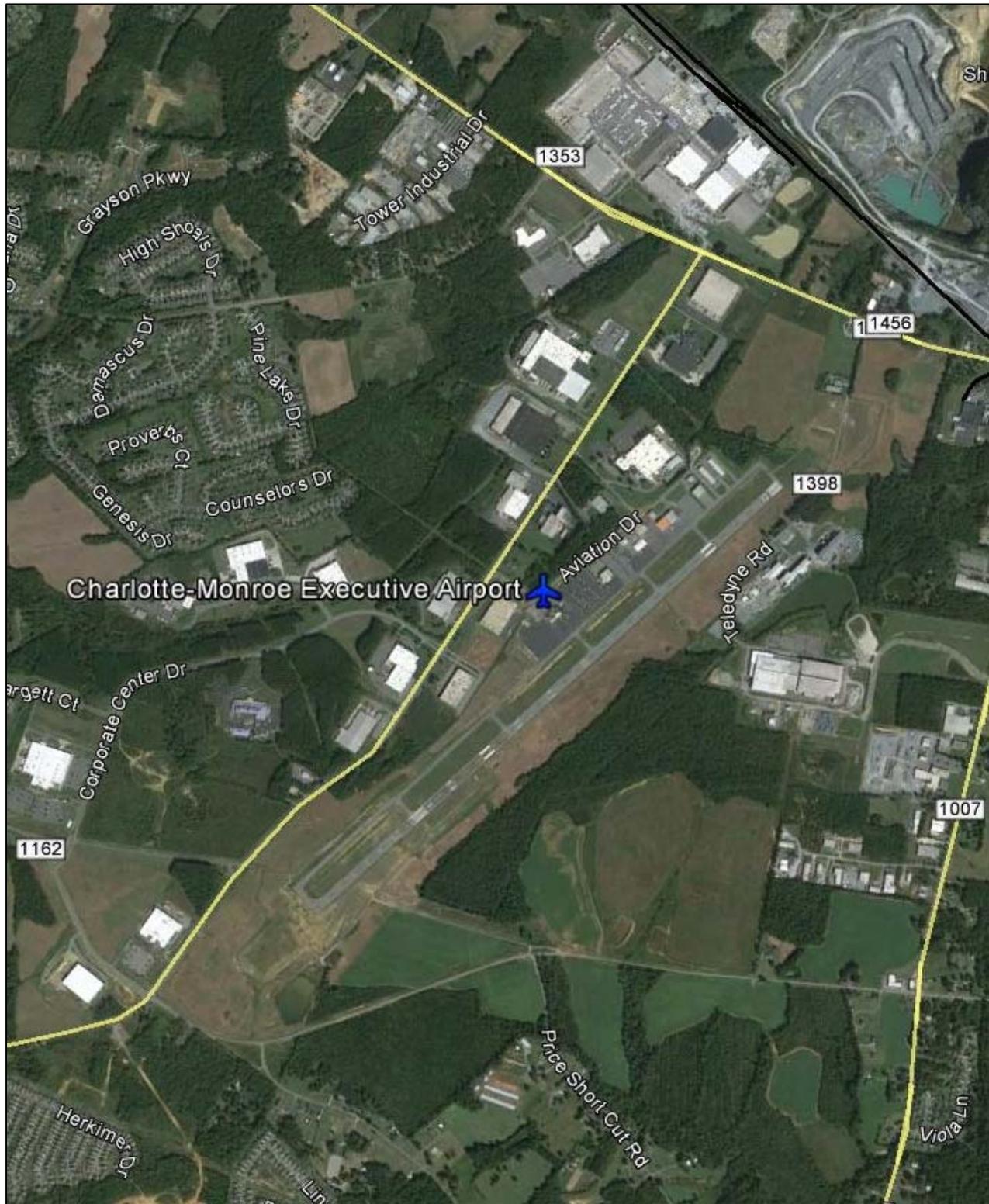
Source: Google Earth/Parrish and Partners of NC, PLLC, 2015.

EXHIBIT 4.3: AERIAL IMAGERY, SMITH-REYNOLDS AIRPORT (INT)



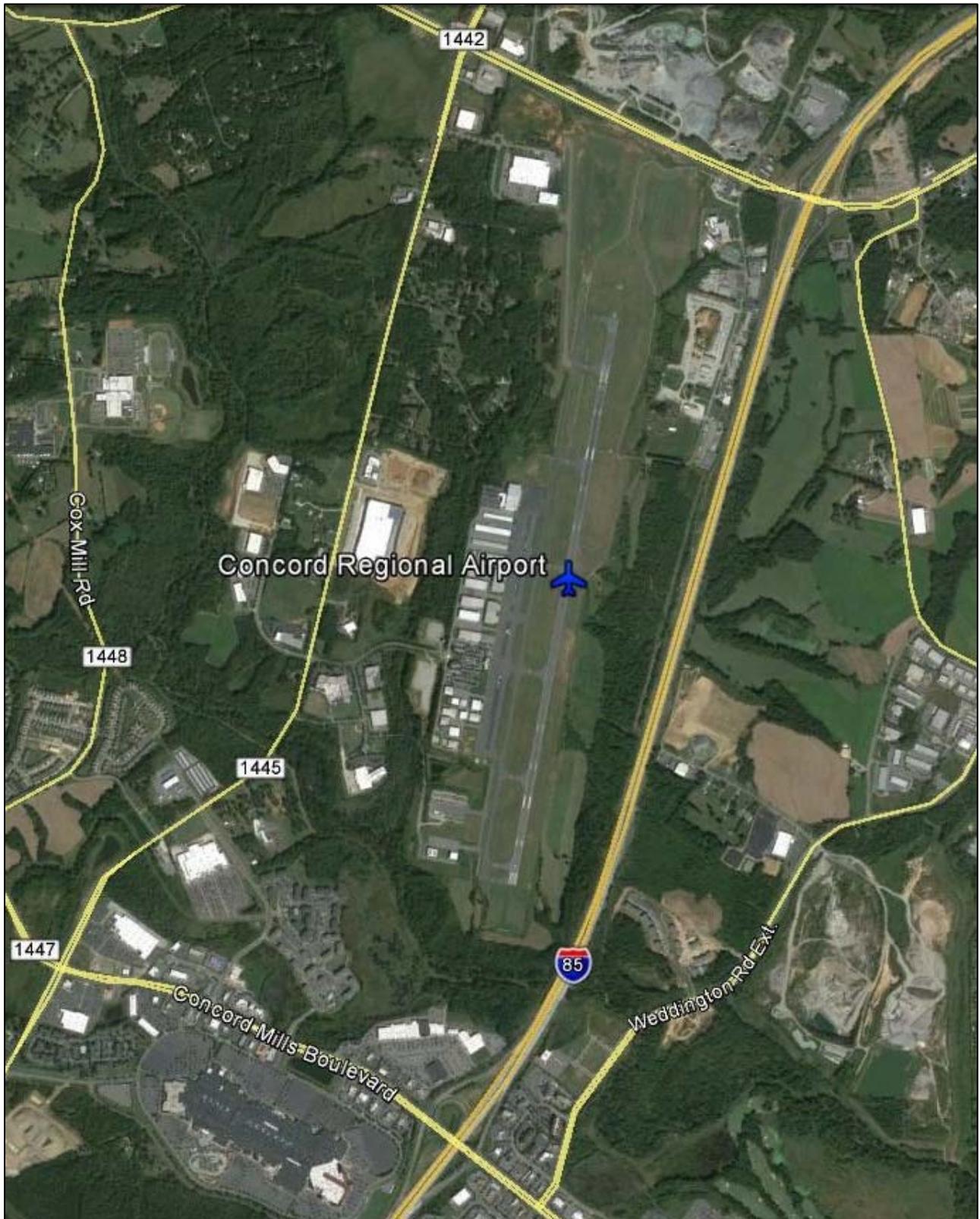
Source: Google Earth/Parrish and Partners of NC, PLLC, 2015.

EXHIBIT 4.4: AERIAL IMAGERY, CHARLOTTE-MONROE EXECUTIVE AIRPORT (EQY)



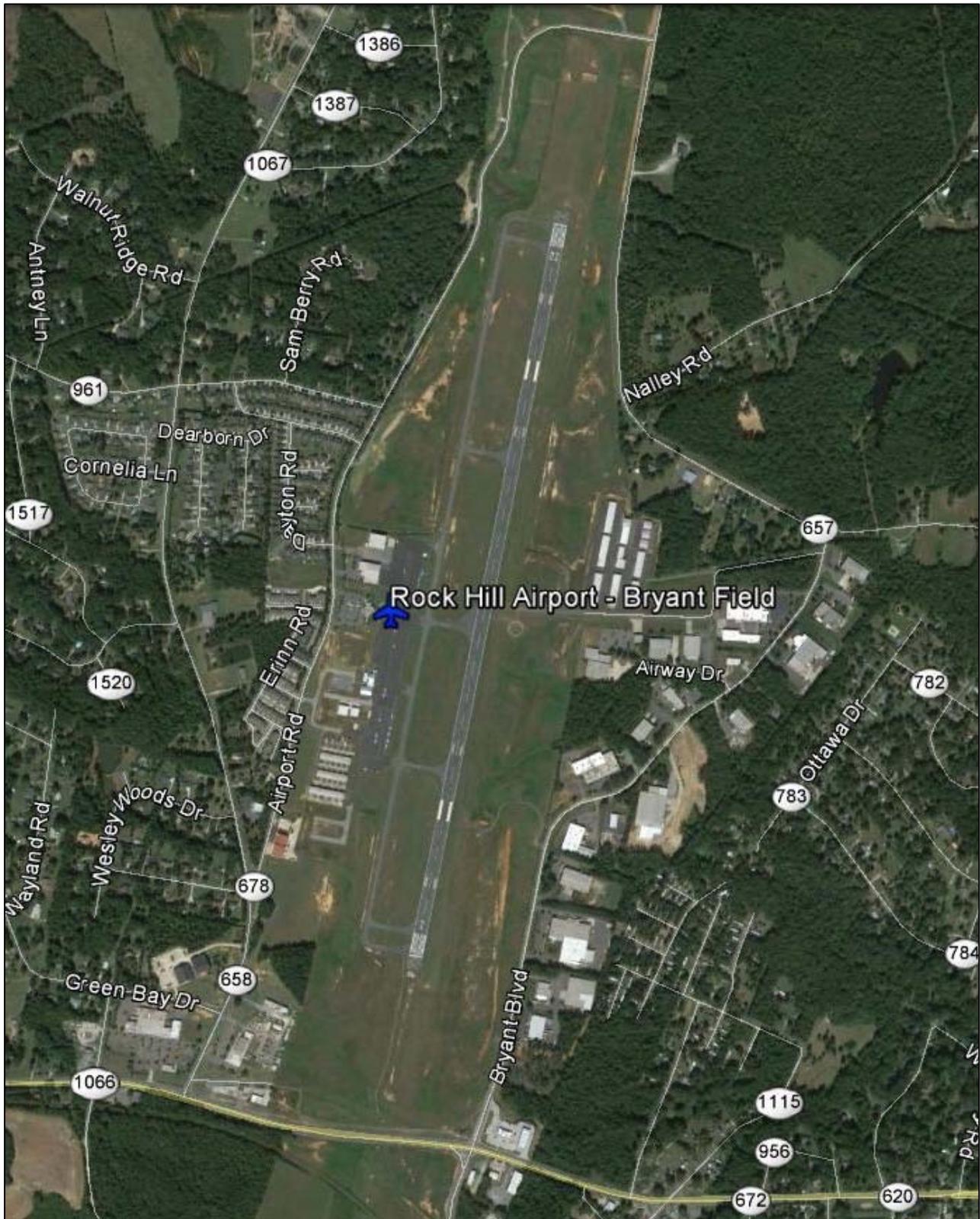
Source: Google Earth/Parrish and Partners of NC, PLLC, 2015.

EXHIBIT 4.5: AERIAL IMAGERY, CONCORD REGIONAL AIRPORT (JQF)



Source: Google Earth/Parrish and Partners of NC, PLLC, 2015.

EXHIBIT 4.6: AERIAL IMAGERY, ROCK HILL AIRPORT – BRYANT FIELD (UZA)



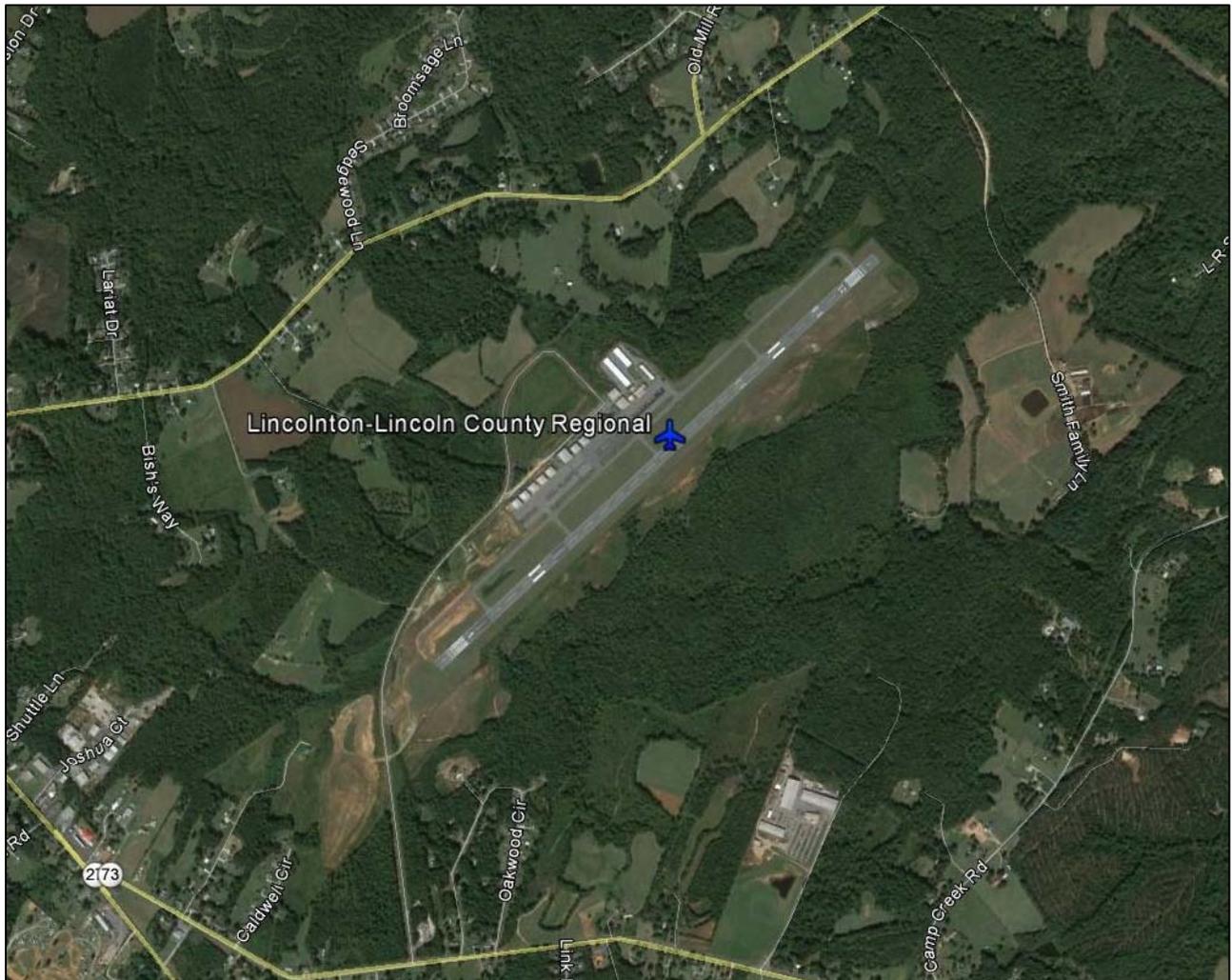
Source: Google Earth/Parrish and Partners of NC, PLLC, 2015.

EXHIBIT 4.7: AERIAL IMAGERY, ROWAN COUNTY AIRPORT (RUQ)

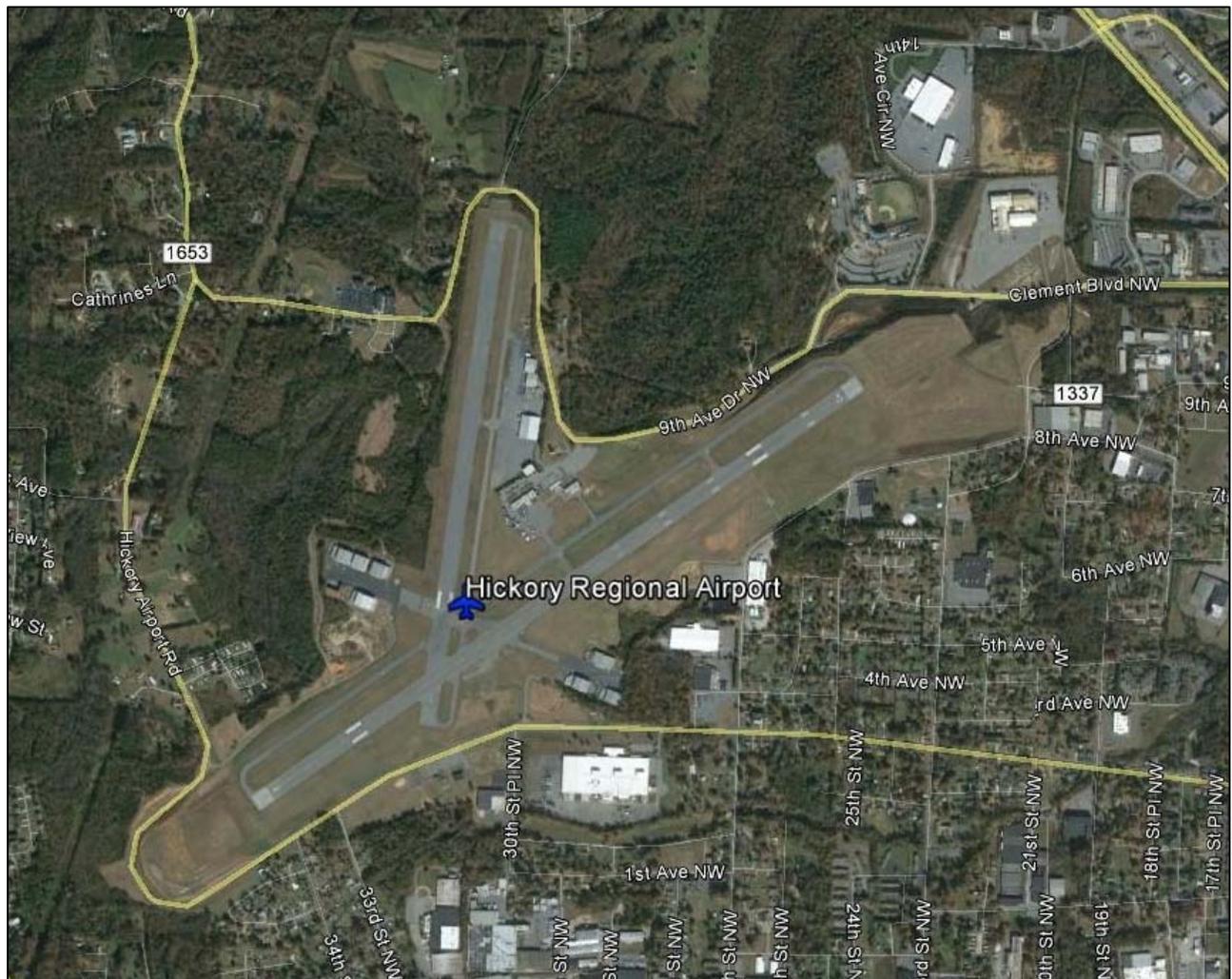


Source: Google Earth/Parrish and Partners of NC, PLLC, 2015.

EXHIBIT 4.8: AERIAL IMAGERY, LINCOLNTON-LINCOLN COUNTY AIRPORT (IPJ)



Source: Google Earth/Parrish and Partners of NC, PLLC, 2015.

EXHIBIT 4.9: AERIAL IMAGERY, HICKORY REGIONAL AIRPORT (HKY)

Source: Google Earth/Parrish and Partners of NC, PLLC, 2015.

4.2.1 Airport Ownership and Role

Of the nine airports in the analysis, the eight comparative airports plus SVH, all but three are city-owned. Lincoln-Lincoln County Regional is jointly owned by the City of Lincoln and Lincoln County. Rowan County Airport and Smith-Reynolds Airport are both county-owned. The FAA classifies airports in the NPIAS in order to receive Airport Improvement Program (AIP) funds. The amount of those funds distributed vary based on the service level and the role of the airport as determined by the NPIAS. The service level describes the type of service an airport provides to the community, whether it be commercial service, relief to a commercial service airport (reliever), or a GA airport. Additionally, general aviation facilities are further classified by their role depending on

the number of based aircraft and the type of flights, etc. This can be of national significance, regional, local, or basic.

Statesville Regional's service level and role according to the NPIAS is General Aviation – Regional. Hickory Regional and Rowan County share the same classification. Lincolnton-Lincoln County Regional is classified as a General Aviation – Local airport. Charlotte-Monroe Executive and Rock Hill/York County-Bryant Field are considered Reliever airports with a regional role. Concord Regional is a reliever airport with a national role. Smith-Reynolds Airport is classified as General Aviation – National, while the Charlotte-Douglas International Airport is a Large Hub Commercial Service Airport of national significance and American Airlines second largest hub in the U.S.

4.2.2 Airport and FBO Services

The services an airport provides can set it apart from others in terms of popularity. Some airports may have a Fixed Based Operator (FBO), others may not. An FBO is a business that operates on the Airport and provides services to the aviation community at the Airport. These services can include fueling, aircraft parking, aircraft rental, airframe/power plant/avionics maintenance, flight instruction, etc. Ownership of the FBO can also vary. In some cases, the FBO is owned and operated by a private company that has an agreement with the airport to do business. In other cases, the airport owner, such as a City or County may also operate the FBO. The following sections present FBO ownership, fueling, and other services at SVH and the comparative airports.

FBO Ownership - Statesville Regional Airport (SVH)'s FBO, Statesville Flying Service (SFS), is privately owned and operated. Of the eight comparative airports, three others have privately owned and operated FBOs. Skytech is the sole privately owned FBO at Rock Hill/York County-Bryant Field, while coincidentally also has a location at the Charlotte-Douglas International Airport along with Wilson Flying Center. The Smith-Reynolds Airport is served by Signature Flight Support, one of the larger FBO companies operating in the U.S today. Charlotte-Monroe Executive, Concord Regional, and Hickory Regional, Lincolnton-Lincoln County Regional, and Rowan County Airport are owned and operated by the airport governing entity (City and/or County).

Fueling - In order to compare fueling services among the airports in the study, two important metrics were measured: (1) fuel prices at the time of this analysis and (2) any fuel incentives available to the aviation community purchasing fuel at the respective airport. Two types of fuels are common in the general aviation industry, 100LL (low lead), and Jet A. All of the study airports provide both

100LL and Jet A fuel. Usually FBO's provide full-service fueling in which an attendant meets you at the aircraft and handles the fueling for you. Some FBO's may also provide self-service fueling, whereby the pilot taxis the aircraft to a fuel pump and services the aircraft manually, similar to automobile pumps.

Of all seven airports in the analysis, the lowest full-service fuel prices were found at Lincoln-Lincoln County Regional Airport. 100LL full-service fuel was reported at \$3.99 per gallon in April 2016. Also full-service Jet A fuel was reported at \$3.49. Smith-Reynolds Airport had the highest fuel costs for full-service 100LL fuel and full-service JetA fuel at \$6.35 and \$6.36, respectively, possibly a result of the Signature acquisition of Landmark Aviation. Out of all the airports, Charlotte-Monroe Executive Airport was the only one that listed self-service Jet A fuel at \$3.60. All other Jet A fuel prices were for full-service. **Table 4.1** details the reported fuel prices. In comparison to the other airports, Statesville Regional Airport's fuel price for 100LL self-service was close to a median price at \$4.68 per gallon. The cost per gallon of Jet A at SVH was the third lowest at \$3.97.

TABLE 4.1: REPORTED FUEL PRICES

Airport	Full-Service 100LL	Self-Service 100LL	Full-Service Jet A	Self-Service Jet A
Statesville Regional Airport	\$4.68	---	\$3.97	---
Charlotte-Douglas Int'l Airport	\$5.25	---	\$4.64	---
Smith-Reynolds Airport	\$6.35	\$4.00	\$6.36	---
Charlotte-Monroe Executive Airport	\$4.40	\$3.70	\$3.99	\$3.60
Concord Regional Airport	\$4.65	---	\$4.32	---
Hickory Regional Airport	\$4.20	\$3.60	\$3.96	---
Lincoln-Lincoln County Regional Airport	\$3.99	---	\$3.49	---
Rock Hill-Bryant Field Airport	\$4.48	\$4.16	\$4.24	---
Rowan County Airport	\$4.14	\$3.60	\$3.99	---

Source: Parrish & Partners of NC, PLLC, 2015, SVH airport management (updated May 2016).

Red represents highest cost, **Green** represents lowest cost

A number of the airports offer fuel incentives. These incentives are typically attainable when a patron fills to a specific volume or tops off the fuel tank. The incentives can be presented to customers in a number of ways. Some offer a direct discount off the fuel price per gallon, others may waive additional fees at the airport. **Table 4.2** provides a summary of the fuel incentives that were reported for the study airports. The table also shows the recalculated fuel price per gallon if the incentive includes a discount off the per gallon fuel price. With the recalculated prices, Lincoln-

Lincoln County Regional Airport is the lowest-cost provider of full-service 100LL and Jet A fuel, while Rowan County Airport is the lowest cost provider of self-service Jet A fuel.

Other Services - Airports and FBO's provide a variety of additional services to the pilot community. These can include maintenance services, aircraft rental, and flight training. Also, many GA airports include ancillary services and amenities for pilots after the flight phase of their trip. These services/amenities are commonly located in a small terminal building and can include rental car services, the availability of a courtesy car, a pilot lounge, and a restaurant or café.

TABLE 4.2: FUEL INCENTIVES AND RECALCULATED PRICES

Airport	Incentive	Reported Fuel Price	Recalculated Fuel Price
Statesville Regional Airport	\$0.27/gal discount with top off, no min, volume	<u>100LL (FS):</u> \$4.68 <u>Jet A (FS):</u> \$3.97	\$4.41 \$3.70
Charlotte-Douglas Int'l Airport	0.50/gal discount off 300 or more gal	<u>100LL (FS):</u> \$5.25 <u>Jet A (FS):</u> \$4.64	\$4.75 \$4.14
Smith-Reynolds Airport	Unknown, none reported	<u>100LL (FS):</u> \$6.35 <u>100LL (SS):</u> \$4.00 <u>Jet A (FS):</u> \$6.36	\$6.35 \$4.00 \$6.36
Charlotte-Monroe Executive Airport	Yes, but not reported	<u>100LL (FS):</u> \$4.40 <u>100LL (SS):</u> \$3.70 <u>Jet A (FS):</u> \$3.98 <u>Jet A (SS):</u> \$3.60	\$4.40 \$3.70 \$3.99 \$3.60
Concord Regional Airport	0.10/gal discount off 30 or more gal 100LL 0.15/gal discount off 300 or more gal Jet A	<u>100LL (FS):</u> \$4.65 <u>Jet A (FS):</u> \$4.32	\$4.55 \$4.17
Hickory Regional Airport	Ramp fees waived with 100 gal After hrs fee waived with 75 gal Free lunch on Fri/Sat w/top off of 20 gal 100LL or top off of 50 gal Jet A	<u>100LL (FS):</u> \$4.20 <u>100LL (SS):</u> \$3.60 <u>Jet A (FS):</u> \$3.96	\$4.20 \$3.60 \$3.96
Lincoln-Lincoln County Regional Airport	Unknown, none reported	<u>100LL (FS):</u> \$3.99 <u>Jet A (FS):</u> \$3.49	\$3.99 \$3.49
Rock Hill-Bryant Field Airport	Unknown, none reported	<u>100LL (FS):</u> \$4.48 <u>100LL (SS):</u> \$4.16 <u>Jet A (FS):</u> \$4.24	\$4.48 \$4.16 \$4.24
Rowan County Airport	0.10/gal discount >50 gal	<u>100LL (FS):</u> \$4.14 <u>100LL (SS):</u> \$3.60 <u>Jet A (FS):</u> \$3.99	\$4.04 \$3.50 \$3.89

Source: www.airnav.com, 7/7/15; Parrish & Partners of NC, PLLC, 2015 (updated May 2016).
Red represents highest cost, **Green** represents lowest cost

A review of FAA Form 5010 – Airport Master Record shows that maintenance services are available at each airport. All of the airports in the comparative analysis are equipped to perform major airframe repairs and major power plant repairs. Also, all of the airports included in the study offer aircraft rental services and flight training through either the FBO(s) or through private companies.

As far as ancillary services, each of the airports provide a pilot lounge, courtesy car, and the availability to reserve rental cars. Information for an on-site airport restaurant was found for one of the studied airports, Hickory Regional Airport.

4.2.3 Airside Facilities and Airspace

Review of the airside facilities is critical in the comparative analysis. This offers the opportunity to compare numbers of runways, runway length and width, runway surface type, runway weight bearing capacity, airfield lighting, types of instrument approaches, weather reporting equipment used at the airport, whether the airport has an Airport Traffic Control Tower (ATCT), and the type of airspace surrounding the airport. These are important factors as they are typically used in the decision making process/flight planning phase for a pilot when determining whether to utilize an airport's facilities.

Runway Data - Most GA airports have one runway oriented in the direction of the prevailing winds. However, if those winds vary in direction frequently, some airports may have at least two runways, one oriented in the primary wind direction and the other serving as a crosswind runway. All of the comparative airports have one runway except Charlotte-Douglas International Airport (four runways), Smith-Reynolds Airport (two runways) and Hickory Regional Airport (two runways). With the exception of Charlotte-Douglas, the runway lengths at each of the airports vary between 3,938 feet and 7,400 feet. Concord Regional Airport's runway is the longest of the studied airports at 7,400 feet while the crosswind runway at Smith-Reynolds Airport is the shortest at 3,938 feet. Again, excluding Charlotte-Douglas as the sole commercial service airport, three of the airports have runways in the 7,000-foot range, including Statesville Regional Airport, while three others are in the 5,000-foot range. All of the studied runways are 100 feet in width except the two at Hickory Regional Airport and Smith-Reynolds Airport, respectively. Both runways at HKY and INT are 150 feet in width. It should be noted that several of the airports, including SVH, have displaced thresholds. In the case of SVH, Runway 10 is displaced 998 feet and Runway 28 is displaced 552 feet, reducing the overall usable length in each direction. Statesville Regional Airport, Concord Regional Airport, Smith-Reynolds Airport, Hickory Regional Airport, and Rock Hill Airport all have asphalt-grooved runways. Charlotte-Monroe Airport, Lincolnton-Lincoln County Airport, and Rowan County Airport have non-grooved asphalt runway surfaces. Charlotte-Douglas is the only airport of the group with concrete-grooved runways.

Finally, weight bearing capacity of the runways may sometimes limit the ability of heavier aircraft to land at an airport. Weight bearing capacity for general aviation airports is reported in thousands of pounds based on aircraft wheel type. Various wheel configurations can distribute loads differently. Single wheel (SW) configurations consist of just that, a single wheel for each of the main gear hubs, and represents smaller single and dual engine piston or turbine aircraft. Dual Wheel (DW) configurations use two wheels per main gear hub and typically include multi-engine piston and turbine aircraft. For example, Statesville Regional Airport reports the weight bearing capacity as 30.0 SW and 100.0 DW. This is interpreted as the runway can support the weight of aircraft 30,000 pounds or lighter in single-wheel configurations or 100,000 pounds or lighter in dual-wheel configurations. Aircraft that represent this higher weight category include the Gulfstream G-V and 500 series, the Embraer 145 series, and the larger Dassault Falcon 900 series. Some airports have evaluated their runways using the Pavement Classification Number (PCN). The PCN reports the strength of the pavement and must be used in conjunction with an Aircraft Classification Number (ACN) in order to determine if the aircraft is not too heavy for the pavement. As an example, Concord Regional Airport uses both the PCN and the traditional method to report the weight bearing capacity of the runway. The PCN of the runway is 37 /F/C/X/T and 129.0 DW. This means that the runway has a load bearing capacity of 37 (unitless and must be compared to the aircraft ACN) and the letters after that describe some of the specifics regarding the PCN calculation. FAA Advisory Circular 150/5335-5A describes in more detail the specifics of the PCN calculation. In this case /F/C/X/T means that the analysis assumes a Flexible pavement type (asphalt), C = the subgrade strength is low, X = high aircraft tire pressures, and T means that the PCN calculation was performed by technical analysis.

Table 4.3 summarizes the runway characteristics for each of the comparative airports.

TABLE 4.3: RUNWAY DATA

Airport	Runways	Length x Width	Surface	Weight Capacity
Statesville Regional Airport	10-28	7,005' x 100'	Asphalt-Grooved	30.0 SW, 100.0 DW
Charlotte-Douglas Int'l Airport	18L-36R	8,676' x 150'	Asphalt -Grooved	PCN68/R/B/W/T, 93.0 SW, 200.0 DW
	18C-36C	10,000' x 150'	Concrete-Grooved	PCN75/R/B/W/T, 93.0 SW, 200.0 DW
	18R-36L	9,000' x 150'	Concrete-Grooved	PCN75/R/B/W/T, 93.0 SW, 200.0 DW
	05-23	7,502' x 150'	Asphalt-Grooved	PCN73/R/B/W/T, 93.0 SW, 170.0 DW
Smith-Reynolds Airport	15-33	6,655' x 150'	Asphalt-Grooved	PCN60/F/C/W/T, 120.0 SW, 211.0 DW
	04-22	3,938' x 150'	Asphalt	PCN6/F/C/Y/T, 18.0 SW, 25.0 DW
Charlotte-Monroe Executive Airport	05-23	7,001' x 100'	Asphalt	35.0 SW, 68.5 DW
Concord Regional Airport	02-20	7,400' x 100'	Asphalt-Grooved	PCN37/F/C/X/T, 129.0 DW
Hickory Regional Airport	01-19	4,400' x 150'	Asphalt	32.0 SW, 55.0 DW
	06-24	6,400' x 150'	Asphalt-Grooved	
Lincoln-Lincoln County Regional Airport	05-23	5,504' x 100'	Asphalt	30.0 SW, 60.0 DW
Rock Hill-Bryant Field Airport	02-20	5,500' x 100'	Asphalt-Grooved	PCN30/F/C/X/T, 78.0 SW, 104.0 DW
Rowan County Airport	02-20	5,501' x 100'	Asphalt	45.0 SW, 55.0 DW

Source: Airport Facility Directory, 25 June 2015-20 August 2015; Parrish & Partners of NC, PLLC, 2015; updated May 2016.

Lighting, Navigational Aids (NAVAIDs), & Weather Equipment - Airport lighting can have an effect on whether a pilot chooses to fly to a specific airport versus others, especially if they are flying in Instrument Meteorological Conditions (IMC). When flying an approach to an airport in IMC, the pilot in command must spot the "runway environment" before continuing below the decision height to landing. Ten items are included in the definition of runway environment according to Federal Aviation Regulation (FAR) Part 91.175 (c)(3). Of these ten items, the approach lighting system, threshold lights, Runway End Identifier Lights (REIL), the Visual Approach Slope Indicator (VASI), touchdown zone lights, and runway lights are included. Additionally, the variety and type of instrument approaches to the airport runways are an important consideration. Precision instrument approaches include both horizontal and vertical guidance to the runway. The typical precision instrument approach NAVAID is the Instrument Landing System (ILS). Other types of approaches are non-precision in nature and only offer horizontal guidance. These type of approaches include Global Positioning System (GPS) approaches, Localizer (LOC) - the horizontal guidance portion of the ILS only approaches, Very-high frequency Omni-directional Range (VOR) approaches, and Non-directional Radio Beacon (NDB) approaches. LOC and VOR approaches are typically used in conjunction with Distance Measuring Equipment (DME) which give a distance reading in nautical miles (nm) from the NAVAID. Also, NDB approaches are still in use at some airports, but are currently being phased out.

Some airports have on-site weather reporting equipment and others rely on off-site solutions. The Automated Surface Observing System (ASOS) and the Automated Weather Observation Station (AWOS) are the two typical weather observing stations used. The AWOS are among some of the older weather reporting systems and predate the ASOS. The ASOS has a few additional reporting capabilities that the AWOS does not.

In comparing each of the study airports, six of the nine airports' primary runways are equipped with High Intensity Runway Lights (HIRL) and three with Medium Intensity Runway Lights (MIRL). All of the runways at each of the study airports has approach lighting guidance. The common approach lights used at the study airports are either REIL's or Medium-Intensity Approach Lighting System with Runway Alignment Indicator Lights (MALSR). Each of the comparative airports has a precision instrument approach via an ILS except Hickory Regional Airport. A summary of the lighting, NAVAIDS, and weather reporting equipment is included in **Table 4.4**.

TABLE 4.4: LIGHTING, NAVAID, & WEATHER DATA

Airport	Runway Lights	Approach Lights	Instrument Approaches	Weather Reporting Equipment
Statesville Regional Airport	HIRL	RW 10: REIL, PAPI RW 28: MALSR, PAPI	RW 10: GPS, VOR/DME RW 28: ILS, LOC/DME, GPS	AWOS III P
Charlotte-Douglas Int'l Airport	RW 18L-36R: HIRL RW 18C-36C: HIRL RW 18R-36L: HIRL RW 05-23: HIRL	RW 18L: REIL, PAPI RW 36R: ALSF-2, REIL, PAPI RW 18C: MALSR, REIL, PAPI RW 36C: ALSF-2, REIL RW 18R: ALSF-2, REIL, PAPI RW 36L: ALSF-2, REIL, PAPI RW 05: MALSR, REIL, PAPI RW 23: REIL, PAPI	RW 18L: ILS, LOC, GPS RW 36R: ILS, LOC, GPS RW 18C: ILS, LOC, GPS, RNP RW 36C: ILS, LOC, GPS, RNP RW 18R: ILS, LOC, GPS RW 36L: ILS, LOC, GPS RW 05: ILS, LOC, GPS, RNP RW 23: ILS, LOC, GPS, RNP	ASOS
Smith-Reynolds Airport	RW 15-33: HIRL RW 04-22: MIRL	RW 15: REIL, PAPI RW 33: MALSR, REIL, PAPI RW 04: None RW 22: PAPI	RW 15: VOR/DME, GPS RW 33: RW 04: ILS, LOC, GPS RW 22:	ASOS
Charlotte-Monroe Executive Airport	HIRL	RW 05: MALSR, REIL, PAPI RW 23: REIL, PAPI	RW 05: ILS, LOC/NDB, GPS RW 23: GPS	ASOS
Concord Regional Airport	HIRL	RW 02: REIL, PAPI RW 20: MALSR, TDZL, PAPI	RW 02: GPS RW 20: ILS, LOC, GPS	AWOS III
Hickory Regional Airport	RW 01-19: MIRL RW 06-24: HIRL	RW 01: REIL, PAPI RW 19: REIL, VASI RW 06: REIL, VASI RW 24: MALSR, PAPI	RW 01: GPS RW 19: GPS RW 06: GPS RW 24: GPS, VOR/DME	ASOS
Lincoln-Lincoln County Regional Airport	MIRL	RW 05: REIL, PAPI RW 23: REIL, PAPI	RW 05: GPS RW 23: ILS, LOC, GPS, NDB	AWOS III P
Rock Hill-Bryant Field Airport	MIRL	RW 02: MALSR, PAPI RW 20: PAPI	RW 02: ILS, LOC, GPS RW 20: GPS	---
Rowan County Airport	MIRL	RW 02: REIL, PAPI RW 20: MALSR, REIL, PAPI	RW 02: GPS RW 20: ILS, LOC, GPS, NDB	AWOS III P

Source: www.airnav.com, Airport Facility Directory, 25 June 2015-20 August 2015; Parrish & Partners of NC, PLLC, updated May 2016.

Air Traffic Control & Airspace – Four airports of the nine have an airport traffic control tower (ATCT), Charlotte-Douglas International Airport, Smith Reynolds Airport, Concord Regional Airport, and Hickory Regional Airport. With the exception of Charlotte-Douglas, which has a highly restrictive Class B airspace, the airspace surrounding each of the airports varies from Class D to Class G. Airspace type can factor into airport usage as each type has different requirements regarding entry, communication, and required aircraft equipment, etc. Two-way communication with Air Traffic Control (ATC) must be established before entering Class B, C and D airspace. Also, pilots operating in Class D under Visual Flight Rules (VFR) must maintain three miles of visibility and remain at least 500 feet below, 1,000 feet above, and 2,000 feet horizontal from clouds. In Class E, there are no ATC or radio communication requirements. VFR Cloud separation is the same as Class

D airspace, but above 10,000 feet the required visibility extends to five miles and the cloud separation requirements extend to 1,000 feet below, 1,000 feet above, and one mile horizontal. Class G is the remainder airspace that is not designated as either Class A, B, C, D, or E. Class G is uncontrolled airspace. VFR cloud separation is the same as Class E.

Five of the nine airports are Class E airports, including Statesville Regional. Concord Regional operates as Class D from 7:00 am to 11:00 pm Eastern Standard Time (EST), then reverts to Class G airspace. Hickory Regional operates as Class D from 7:00 am to 9:00 pm (EST), then reverts to Class E airspace. Aviation utilizes Zulu (Greenwich Mean) Time, which does not observe Daylight Savings Time. The Class D operating times noted above during Eastern Daylight Time (EDT), will be one hour later.

Airport Traffic Data - To compare the current traffic data at each airport, the FAA's Terminal Area Forecast (TAF) and the Airport Master Record Form 5010 was consulted. An operation is defined as either a takeoff or a landing and operations are split by type: either Air Carrier, Air Taxi, General Aviation (GA), or Military. GA operations are further split between local and itinerant. Based aircraft represent those aircraft physically kept at the airport and the fleet mix represents the different based aircraft types.

Again, with the exception of Charlotte-Douglas International Airport, which in 2015 logged over 550,000 aircraft operations, the GA airport with the highest number of total aircraft operations is Concord Regional Airport with 59,010. The lowest is Lincolnton-Lincoln County Regional Airport with 34,100. In comparison, Statesville Regional Airport has 36,200 total operations. **Table 4.5** summarizes the breakout of operations by type. In comparing based aircraft, Concord Regional Airport reported the highest number of aircraft with 162 and Statesville Regional Airport reported the lowest with 72. **Table 4.5** also expands on the based aircraft counts and the fleet mix. Enplanements are a count of passengers boarding aircraft at an airport. General aviation airports typically do not report enplanements as they are not boarding air carrier passengers or operating scheduled passenger flights. However, Concord Regional Airport reported 10,403 enplanements on their 5010 form along with 1,237 air carrier operations. Charlotte-Douglas International Airport one of the Nation's busiest commercial service airport, reported over 22 million enplanements in 2015 and had 82 based fixed wing and rotorcraft, but is excluded from **Table 4.5**.

TABLE 4.5: AIRPORT TRAFFIC DATA

Data	SVH	INT	EQY	JQF	HKY	IPJ	UZA	RUQ
Total Ops	36,200	42,307	56,100	59,010	40,504	34,100	36,000	43,000
Air Carrier:	---	164	---	1,237	---	---	---	---
Air Taxi:	1,000	2,859	4,100	6,853	---	---	400	1,000
GA Local:	19,000	12,418	30,500	19,258	12,208	15,300	25,015	16,000
GA Itinerant:	16,000	25,491	20,500	31,276	27,766	17,900	10,500	22,100
Military:	200	1,375	1,000	386	458	900	85	3,900
Based Aircraft	72	89	110	162	79	73	146	106
Fleet Mix	S32, M16, J24	S64, M9, J16	S95, M11, J4	S107, M25, J30	S58, M12, J9	S65, M8, J0	S129, M12, J5	S74, M8, J3
Enplanements	---	---	---	10,403	---	---	---	---

Notes: Airport Identifiers Depicted in Table include:
 SVH - Statesville Regional Airport
 INT - Smith-Reynolds Airport
 EQY - Charlotte-Monroe Executive Airport
 JQF - Concord Regional Airport
 HKY - Hickory Regional Airport
 IPJ - Lincolnton-Lincoln County Regional Airport
 UZA - Rock Hill/York County-Bryant Field
 RUQ - Rowan County Airport

Source: FAA Terminal Area Forecast (last historical year = 2013)
 FAA Airport Master Record, June 2015; S=Single-Engine, M=Multi-Engine, J=Jet; does not include helicopter, glider, military, ultra-light
 Parrish & Partners of NC, PLLC, 2016.

4.2.4 Landside Facilities and Access

As previously mentioned, most ancillary services at GA airports are typically located in a terminal building. Each of the airports in the comparative analysis have terminal buildings of various sizes. Excluding Charlotte-Douglas for obvious comparative reasons, the largest of the GA terminal buildings is located at Hickory Regional Airport with approximately 17,000 square feet. The smallest is located at Rowan County Airport with 3,250 feet. Additionally, it should be noted that Smith-Reynolds Airport, as an airport that maintains its Part 139 certification and as late as 2000 had scheduled air carrier service, does maintain a commercial passenger terminal with approximately 34,600 square feet. Numerous tenants call this facility home, including various rental car companies and other GA companies.

The proximity to roads and rail is also another important consideration. All of the airports, except Concord Regional Airport, are within two miles of a rail line. Each of the study airports are also within a few miles of the nearest major interstate, with the closest being Concord Regional Airport, at 0.3 miles from Interstate 85, and the farthest being Lincolnton-Lincoln County Airport, at 13.8

miles from Interstate 85. In comparison, Statesville Regional Airport is approximately 0.9 miles from a rail line, 1.5 miles from Interstate 40, and 5.1 miles from Interstate 77.

All of the study airports are within three miles of restaurants and hotel/motel facilities. A summary of the landside facilities and access are shown in **Table 4.6**.

Airport	Terminal Area¹	Proximity to Rail²	Proximity to Highway²
Statesville Regional Airport	4,130 sf	0.9 mi	I-40: 1.5 mi I-77: 5.1 mi
Smith Reynolds Airport	11,600 sf 34,600 sf (commercial)	0.2 mi	I-40: 6.0 mi
Charlotte-Monroe Executive Airport	15,000 sf	1.1 mi	I-485: 7.2 mi
Concord Regional Airport	6,600 sf	---	I-85: 0.3 mi I-485: 2.7 mi
Hickory Regional Airport	17,000 sf	0.9 mi	I-40: 2.4 mi
Lincolnton-Lincoln County Regional Airport	10,000 sf	1.5 mi	I-85: 13.8 mi
Rock Hill/York County - Bryant Field Airport	4,600 sf	0.8 mi	I-77: 3.9 mi
Rowan County Airport	3,250 sf	0.7 mi	I-85: 1.7 mi

Source: Google Earth; Parrish & Partners of NC, PLLC.

¹ SVH area from Woolpert 18B survey, remaining airports are an area calculation from Google Earth; each area calculation represents first floor only

² Google Earth straight-line distance calculation from the approximate airport center to the nearest point on the railroad or highway

4.2.5 Hangar and Apron Facilities

Table 4.7 which follows performed a comparative analysis of the GA hangar and apron areas available to the flying public at each facility. The Statesville Regional Airport data was obtained from the inventory efforts of the on-going ALP update efforts, while the areas calculated for the other eight airports was gleaned from aerial surveys utilizing Google imagery from 2015. Due to the nature of the operations at CLT, it was eliminated from this comparison. Although SVH provides the largest apron areas for aircraft tie-down and overnight parking, the Airport lags significantly in hangar storage available. When comparing SVH to other competing airports, such as Smith-Reynolds, Concord Regional, and Hickory Regional, it offers at least 50% less and in some cases 60-75% less. This imbalance should be considered by the City as it evaluates capital development and investigates strategies to lure new entrant tenants.

Also of note is that lack of T-hangar storage at Statesville Regional in comparison to many of the other peer airports evaluated. Only Hickory Regional does not provide T-hangar storage on airport property. This fact is not considered to be an indicator of a deficiency, rather a differentiation in possibly in the type GA customers each airport may choose to focus on. Further, T-hangar construction can oftentimes struggle to provide an ample return on investment to airport owners. Nevertheless future planning for the airport should consider any advantage to constructing T-hangar facilities to provide exclusive hangar use to smaller corporate tenants.

TABLE 4.7: HANGAR AND APRON FACILITIES

Airport	Airport Identifier	T-Hangar Area (sf)	T-Hangar Units	Conventional Hangar Area (sf)	Common-Use Apron Area (sy)
Statesville Regional Airport	SVH	0	0	87,100	76,467
Smith Reynolds Airport	INT	52,500	42	265,400	10,000
Charlotte-Monroe Executive Airport	EQY	25,800	20	76,900	40,150
Concord Regional Airport	JQF	80,700	67	322,450	56,500
Hickory Regional Airport	HKY	0	0	163,200	8,200
Lincolnton-Lincoln County Regional Airport	IPJ	41,300	34	60,900	8,250
Rock Hill/York County - Bryant Field Airport	UZA	131,100	100	61,500	15,100
Rowan County Airport	RUQ	124,100	77	81,800	7,200

Source: Parrish & Partners of NC, PLLC, 2016.

Analysis developed via area calculations from aerial survey (google Earth Pro). Areas are inclusive of all style hangars. Does not include apparent office space. Apron includes areas adjacent to terminal areas only, and may include taxilanes interior to ramp area.

4.2.6 GA Facility Rates and Availability

Beyond considering how infrastructure compares between the peer airports and SVH, further analysis was conducted to look into hangar availability, both for T-hangars and bulk/conventional hangars. Additionally, information regarding rental/lease rates for these facilities along with apron usage for based and transient aircraft was determined to also be a strong indicator of supply and

demand. **Table 4.8** provides a summary of those airports at which the Consultant was able to gather comparative information in a consistent manner. Only the information for Charlotte-Douglas was unavailable after repeated inquiries through the FBO, Wilson Air Center. Given the nature of the CLT operations, its limited GA facility resources and the intense use by larger corporations, it is felt that the comparison would be biased toward much higher rates and much less availability. For these reasons the lack of CLT data is inconsequential.

Based on a cursory review of current rates and charges at all airports considered in the survey, the rates charged at Statesville Regional seem competitive, with no apparent justification for near term changes. A few conditions stand out relative to the group, notably the consistent occupancy and rates charged for T-hangar space at both Charlotte-Monroe Executive and Concord. This may possibly be driven by lack of bulk storage, desires for exclusive storage, the age and condition of T-hangars and the closer proximity of both facilities to the downtown Charlotte area. Of the airports (six) with T-hangar facilities, all facilities were completely full and each maintains an active waitlist, in one case (Lincolnton) with over 40 expressing interest. Many of those surveyed noted plans for capital expansion for apron, while virtually all expressed desires to add additional T-hangars and bulk/conventional storage facilities.

TABLE 4.8: GA FACILITY RATES AND AVAILABILITY									
Factor	CLT	EQY	JQF	HKY	IPJ	UZA	RUQ	INT	SVH
Monthly rental/lease rate for multi-engine aircraft (i.e., Beech 60 Duke):									
T-Hangar Storage	NR	\$370.00	\$290.00	None	\$200.00	\$190.00	\$275.00	\$236.00 SE only	--
Bulk/Conventional Hangar Storage	NR	\$295.00	\$275.00	\$300.00	\$300.00	\$250.00	\$350.00	\$180.00 - \$230.00	\$295.00
Based Tie-Down Storage	NR	\$70.00	\$45.00	\$75.00	\$50.00 SE; \$70.00 ME	\$70.00	\$50.00	none	\$65.00
Overnight/Transient Tie Down Storage	NR	\$15.00	\$50.00	\$20.00	\$5.00 SE; \$10.00 ME	\$10.00 waived w/fuel	\$10.00 waived w/fuel	\$20.00	\$10.00 waived w/fuel
Availability of Hangars:									
T-Hangars	NR	N	N	--	N	N	N	N	--
Waitlist Exists	NR	Y	Y	--	Y	Y	Y	Y	--
Approximate # on Waitlist	NR	12	7	--	41	few	several	7	--
Estimated Turnover	NR	1 year	varies	--	varies	6 months	2 years	3 months	
Large/Bulk Hangar Storage	NR	N	Y	Y	Y	Y	N	N	N
Waitlist Exists	NR	Y	Y	Y	Y	Y	Y	Y	Y
Current/upcoming expansion:									
Apron Tie-Down Space	NR	Y	Y	N	Y	N	N	N	Y
T-Hangars	NR	Y	Y	N	Y	N	N	N	N
Bulk Hangar Storage	NR	Y	Y	Y	Y	N	Y	N	Y
List of Corporations at Airport?	NR	N	Y	Y	N	Y	N	N	Y
Is the List Available?	NR	--	N	Y	--	N	--	--	Y

Notes: Airport Identifiers Depicted in Table include:
 SVH - Statesville Regional Airport
 CLT - Charlotte-Douglas International Airport
 INT - Smith-Reynolds Airport
 EQY - Charlotte-Monroe Executive Airport
 JQF - Concord Regional Airport
 HKY - Hickory Regional Airport
 IPJ - Lincolnton-Lincoln County Regional Airport
 UZA - Rock Hill/York County-Bryant Field
 RUQ - Rowan County Airport

Source: Parrish & Partners of NC, PLLC, 2016.

4.2.7 County Aircraft Registrations

Oftentimes many factors influence decisions on where to register an aircraft, including where a person or corporation resides, proximity of nearby aviation facilities to base aircraft, availability of tie-down or hangar space, personal property/aircraft taxation rates, overall business environment, etc. Many of these items have been addressed in other sections; however this section presents a summary analysis of taxation rates for personal property by County, assuming most aircraft residing at an airport are most likely registered in that same jurisdiction. **Table 4.9** presents the county tax rate per \$100 of assessed value, along with a sample annual rate paid for \$1 million aircraft.

Finally, as a comparison to determine the attractiveness of the counties in the analysis, research of the FAA Aircraft Registration Database was performed. The databased categorizes aircraft registrations based on type of ownership, which falls into one of five main categories: individual, co-owned, partnership, corporation, and government. **Table 4.10** presents a summary, by County, of all aircraft registrations and the resulting percentage of aircraft owned and registered by corporations. Interestingly, Iredell County is in the top 3, from a percentage standpoint, comparing favorably with Mecklenburg County and Union County. This strongly suggests the attractiveness of the County and the Statesville Regional Airport to corporate aircraft owners, regardless of size. These tenants typically purchase more fuel, use the Airport on a more regular basis, and require a heightened level of support services to maintain their business.

TABLE 4.9: AIRCRAFT PERSONAL PROPERTY TAX, BY COUNTY

County	Airport	*Tax Rate (per \$100)	Annual Property Tax (\$1M Sample Aircraft Value)
Cabarrus	Concord Regional Airport	1.1800	\$11,800.00
Catawba	Hickory Regional Airport	1.2400	\$12,400.00
Iredell	Statesville Regional Airport	0.9375	\$9,375.00
Lincoln	Lincolnton-Lincoln County Airport	1.1710	\$11,710.00
Mecklenburg	Charlotte-Douglas International Airport	1.2944	\$12,944.00
Rowan	Rowan County Airport	0.7495	\$7,495.00
Union	Charlotte-Monroe Executive Airport	1.3628	\$13,628.00
Forsyth	Smith-Reynolds Airport	1.2690	\$12,690.00
York	Rock Hill Airport - Bryant Field	1.5700	\$15,700.00

**County and City tax rate combined*

Source: Parrish & Partners of NC, PLLC, 2016.

TABLE 4.10: CORPORATE AIRCRAFT REGISTRATION BY COUNTY

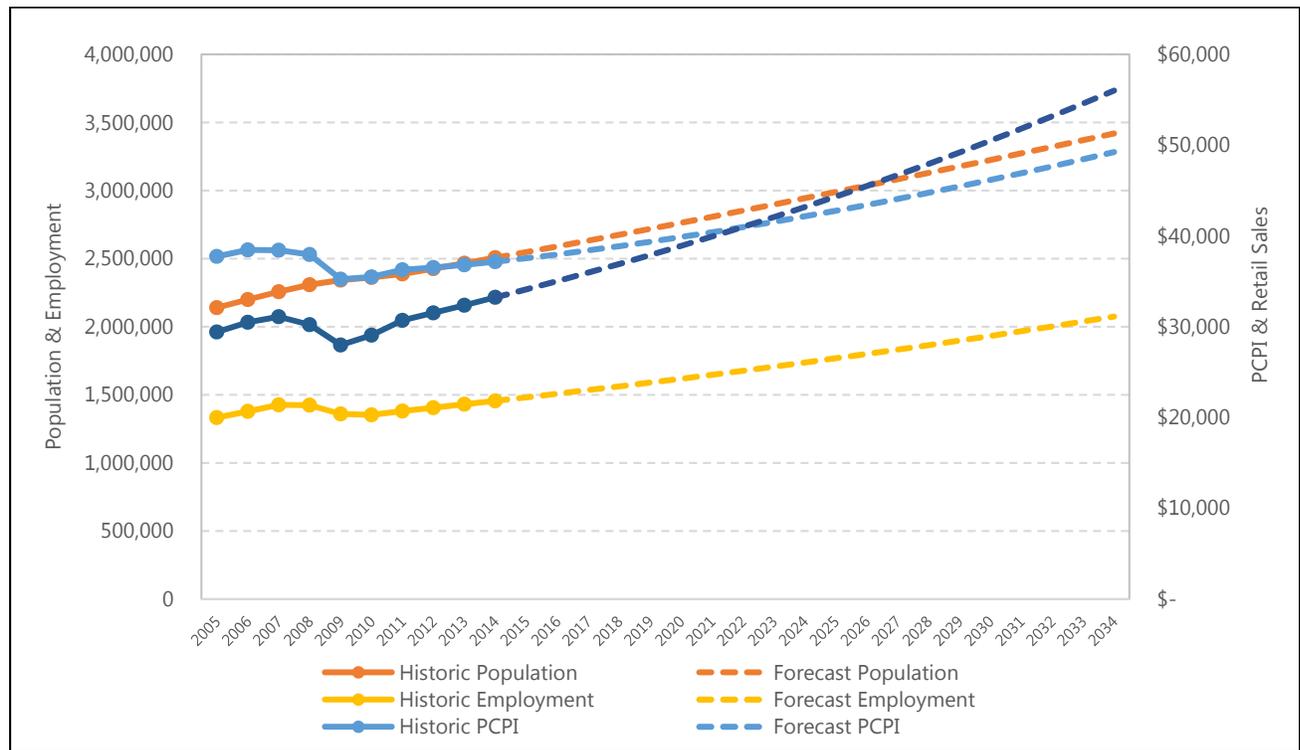
County	Airport	Total Aircraft Registrations	Corporate Aircraft Registrations (% of Total)
Iredell	Statesville Regional Airport	249	43.0 %
Mecklenburg	Charlotte-Douglas International Airport	549	49.9 %
Forsyth	Smith-Reynolds Airport	236	37.7%
Union	Charlotte-Monroe Executive Airport	177	45.2 %
Cabarrus	Concord Regional Airport	165	35.8 %
Catawba	Hickory Regional Airport	146	27.4 %
Lincoln	Lincolnton-Lincoln County Regional Airport	64	31.3 %
York	Rock Hill/York County-Bryant Field	128	23.4 %
Rowan	Rowan County Airport	122	16.4 %

Source: Parrish & Partners of NC, PLLC, 2016.

4.2.8 Local / Regional Socioeconomics and Growth Potential

As a part of the ALP Update project, local, regional, state and national trends were studied from both a socioeconomic standpoint as well as from an aviation growth perspective. From an overarching standpoint, nationally, the FAA focuses on three aviation components to analyze trends: active pilots, active aircraft fleet, and active hours flown. In the case of active pilots and active aircraft, the outlook is very mixed at best. Nationally, pilot training has struggled and is forecast to do so. Active aircraft is largely driven by new aircraft production. Fortunate for SVH, the turbine fleet growth is the one bright spot on the horizon for general aviation; all other categories with the exception of the "sport" category are forecast to decline or remain relatively unchanged. Considering national trends and FAA more localized Terminal Area Forecast (TAF), a specific forecast for SVH was generated for aviation activity, namely operations and based aircraft. These forecasts span a 20-year planning horizon and take into account local and regional trends for socioeconomic indicators that historically are excellent aviation activity indicators, such as population, employment, retail sales, and per capita personal income (PCPI). A service area was defined, based on a 30-minute drive time from SVH, and was determined to include 14 counties: Alexander, Burke, Cabarrus, Caldwell, Catawba, Davidson, Davie, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, Wilkes, & Yadkin. Woods & Poole Economics was utilized to produce a regional historical and projected data for the entire service area inclusive of all 14 counties. This analysis indicated positive trends within the service area for each demographic and is shown in **Exhibit 4.10**.

EXHIBIT 4.10: POPULATION, EMPLOYMENT, PCPI, & RETAIL SALES ACTIVITY IN THE SERVICE AREA



Source: Woods & Poole Economics, 2014. Parrish & Partners of NC, PLLC, 2016.

As it relates to aviation activity, it is anticipated that SVH will see an overall growth annually over the 20-year planning period. Comparison to the FAA TAF summaries for North Carolina and the U.S. indicates that the Airport is likely to outpace state and national growth, with SVH expected to grow at a rate of 3.0% and 3.1%, respectively. Based aircraft at SVH are expected to increase from 74 in 2014 to 134 by 2034. The Airport will also see an increase in the number of total aircraft operations. By the end of the planning period, more than 64,900 operations are projected to occur at the Airport. **Table 4.11** summarizes these projections along with the anticipated fleet mix of based aircraft. For a more detailed explanation of the forecast analysis, refer to the ALP Update Narrative Report under separate cover.

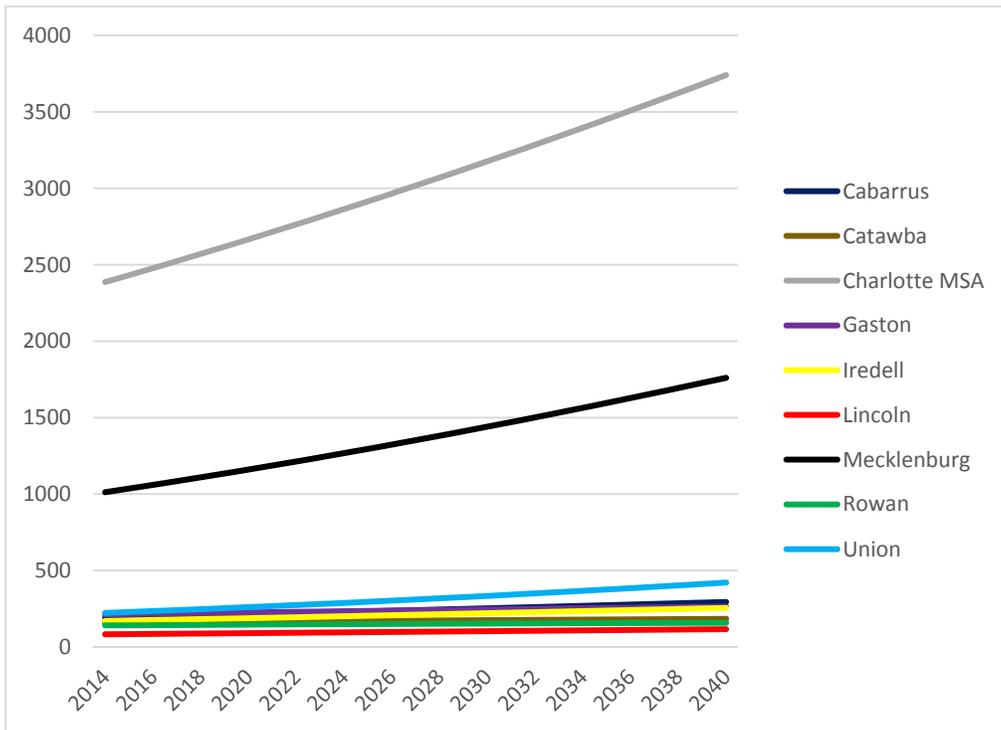
From an economic development perspective, localized county growth is more critical; therefore, a more focused analysis was performed for the immediate Charlotte metropolitan area and the counties that the majority of the peer airports fall within. The exceptions were Rock Hill in South Carolina and Smith-Reynolds which is part of the Greensboro-Winston Salem-High Point metropolitan area. The counties considered for this more focused analysis included the following

eight counties: Cabarrus, Catawba, Gaston, Iredell, Lincoln, Mecklenburg, Rowan, and Union. Again, Woods & Poole Economics was utilized to produce county and aggregate regional projected data for the 8-county area as a whole. This additional analysis, in a similar but refined manner, took into account population, employment, retail sales, PCPI and Gross Regional Product (GRP) - with and without Charlotte/Mecklenburg County. The decision of evaluating data with and without Charlotte/Mecklenburg was to determine the level of impact by the City of Charlotte versus the outlying counties and their individual growth levels. The impact of Charlotte/Mecklenburg was significant and overshadowed the outlying counties, thus for presentation purposes was removed to evaluate and explain how Iredell County is projected to perform versus the other areas. **Exhibits 4.11 through 4.15** illustrate the projected trends by county for population, employment, retail sales, PCPI and Gross Regional Product (GRP), respectively. Note in all cases, Iredell County is represented with the bright yellow indicator line.

TABLE 4.11: SUMMARY OF BASED AIRCRAFT, FLEET MIX, & OPERATIONS FORECASTS									
Type	Historical	Forecast Values				Average Annual Compound Growth Rates			
	Base Year 2014	Base + 5 2019	Base +10 2024	Base +15 2029	Base +20 2034	Base + 5 2019	Base +10 2024	Base +15 2029	Base +20 2034
OPERATIONS									
<i>ITINERANT</i>									
Air Carrier	0	0	0	0	0	0.0%	0.0%	0.0%	0.0%
Air Taxi	1,000	1,000	1,000	1,000	1,000	0.0%	0.0%	0.0%	0.0%
General Aviation	16,000	19,500	22,700	26,100	29,700	4.0%	3.6%	3.3%	3.1%
Military	200	200	200	200	200	0.0%	0.0%	0.0%	0.0%
<i>LOCAL</i>									
General Aviation	19,000	23,100	26,900	30,900	35,200	4.0%	3.5%	3.3%	3.1%
Military	0	0	0	0	0	0.0%	0.0%	0.0%	0.0%
TOTAL OPS	36,200	43,800	50,800	58,200	66,100	3.9%	3.4%	3.2%	3.1%
BASED AIRCRAFT									
Single-Engine	32	36	40	43	45	2.5%	2.2%	1.9%	1.7%
Multi-Engine	8	9	11	12	13	3.2%	2.9%	2.6%	2.4%
Turboprop	8	10	12	14	17	3.7%	3.7%	3.8%	3.8%
Jet	24	29	35	42	50	4.1%	3.9%	3.8%	3.7%
Helicopter	2	3	5	7	8	10.6%	9.3%	8.2%	7.4%
TOTAL BASED A/C	74	88	102	117	134	3.5%	3.3%	3.1%	3.0%

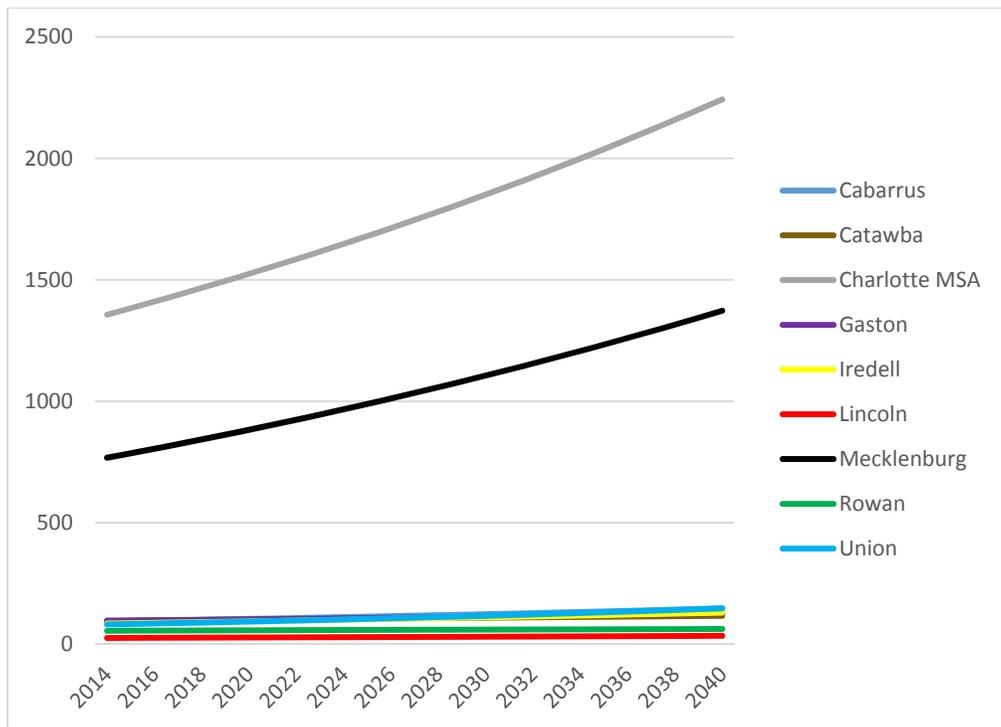
Source: Woods & Poole Economics, 2014. ALP Update Narrative Report, May 2016. Parrish & Partners of NC, PLLC, 2016.

EXHIBIT 4.11: POPULATION PROJECTIONS - In Thousands (w/o Charlotte/Mecklenburg Co.)



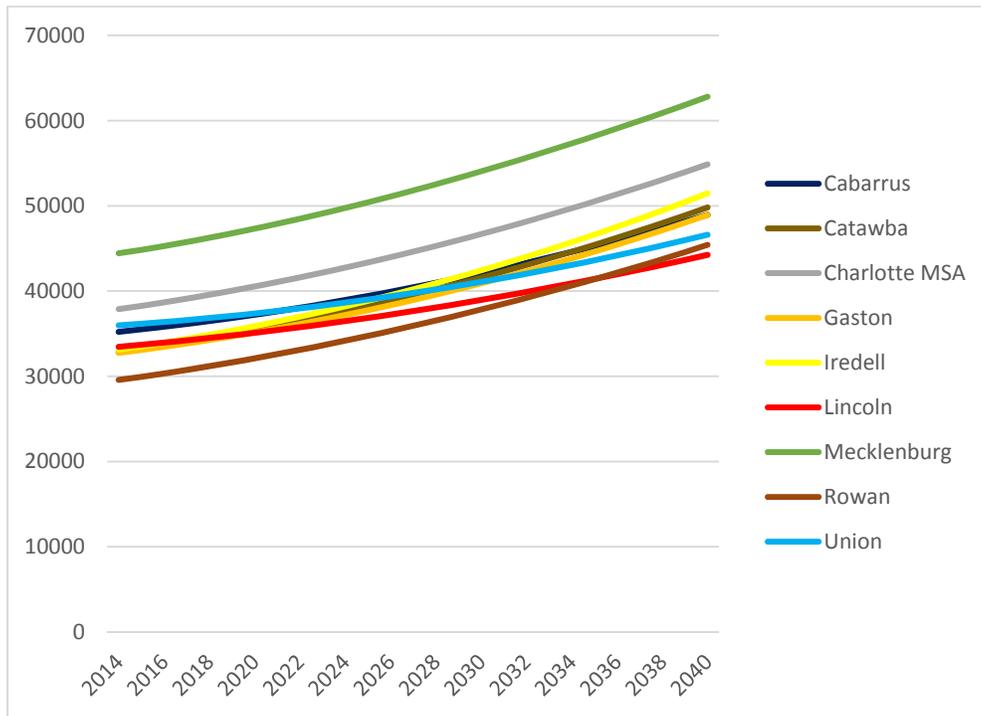
Source: Woods & Poole Economics, 2016. Parrish & Partners of NC, PLLC, 2016.

EXHIBIT 4.12: EMPLOYMENT PROJECTIONS - In Thousands (w/o Charlotte/Mecklenburg Co.)



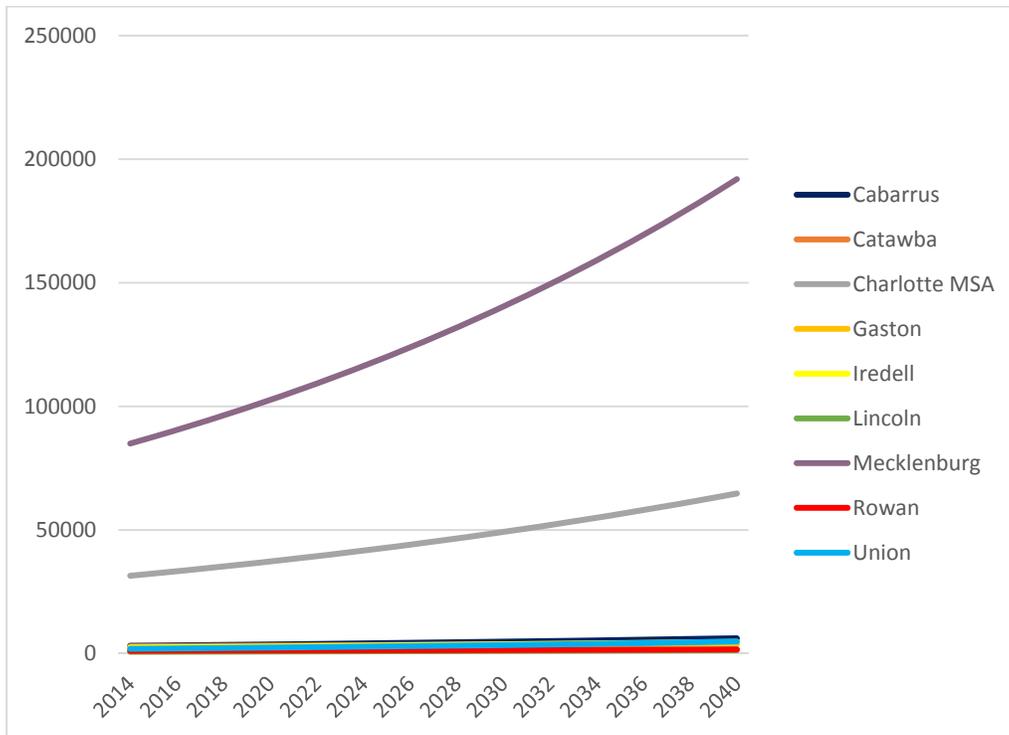
Source: Woods & Poole Economics, 2016. Parrish & Partners of NC, PLLC, 2016.

EXHIBIT 4.13: PER CAPITAL PERSONAL INCOME – In Dollars (w/o Charlotte/Mecklenburg Co.)



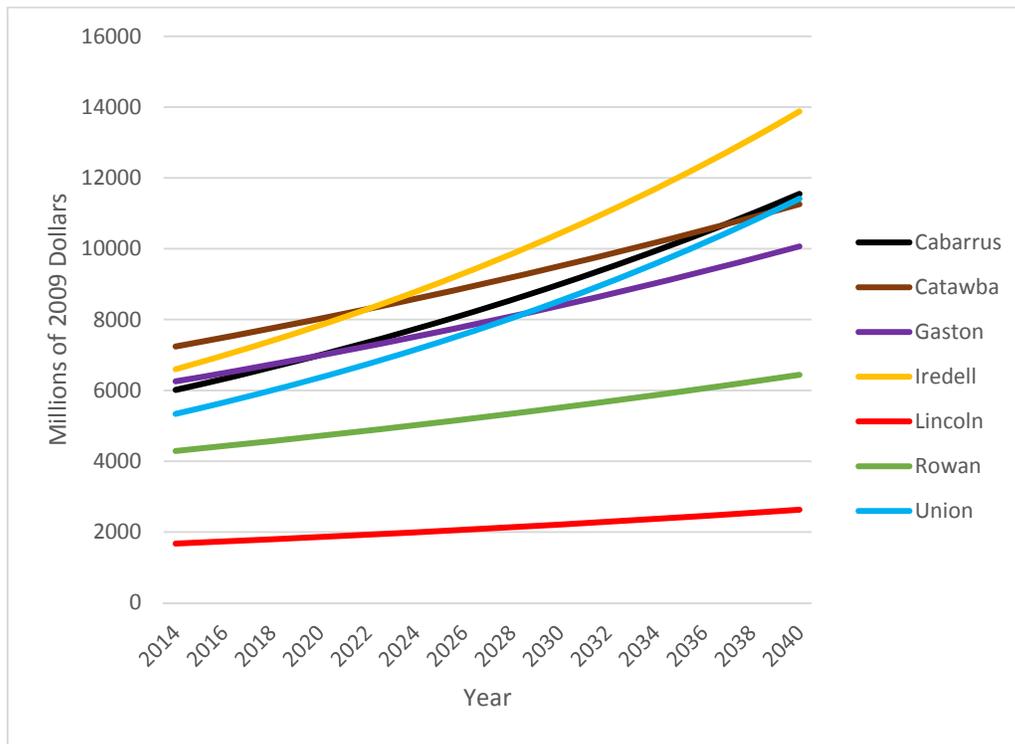
Source: Woods & Poole Economics, 2016. Parrish & Partners of NC, PLLC, 2016.

EXHIBIT 4.14: RETAIL SALES PROJECTIONS – In 10,000 Dollars (w/o Charlotte/Mecklenburg Co.)



Source: Woods & Poole Economics, 2016. Parrish & Partners of NC, PLLC, 2016.

EXHIBIT 4.15: GROSS REGIONAL PRODUCT (w/o Charlotte/Mecklenburg Co.)



Source: Woods & Poole Economics, 2016. Parrish & Partners of NC, PLLC, 2016.

In summary when excluding the City of Charlotte and Mecklenburg County contribution, Union and Cabarrus Counties are projected to lead the region in population and employment growth; however, Iredell County remains the third fastest growing. In a positive trend, Iredell County is projected to exceed all other counties in PCPI growth by the end of the planning horizon, and move from third to second behind Cabarrus County in retail sales. More importantly, Iredell County’s already strong GDP component is projected to climb at the fastest rate, pushing them into a leadership role within 5-10 years. These are all excellent indicators for the economic growth of Iredell County, and points to a bright, robust environment for new business and existing business growth. These factors all should work to support a healthy aviation market at SVH and continued interest in aeronautical and non-aeronautical development on and near the Airport.

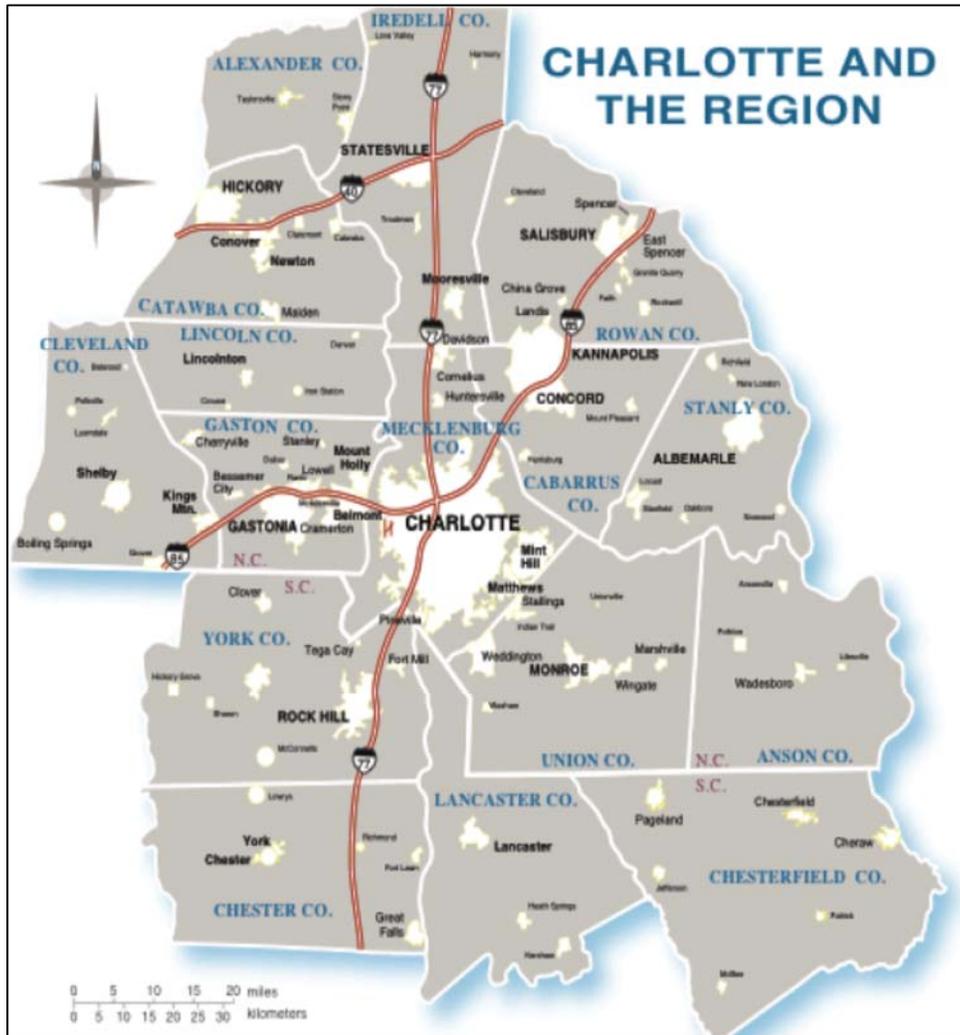
4.2.9 Area Land Use and Zoning

The Statesville Regional Airport (SVH) occupies roughly 412 acres of property and is situated approximately four miles southwest of downtown Statesville. The City of Statesville is located in Iredell County, whereby the approximate center of the County is situated near the intersection of

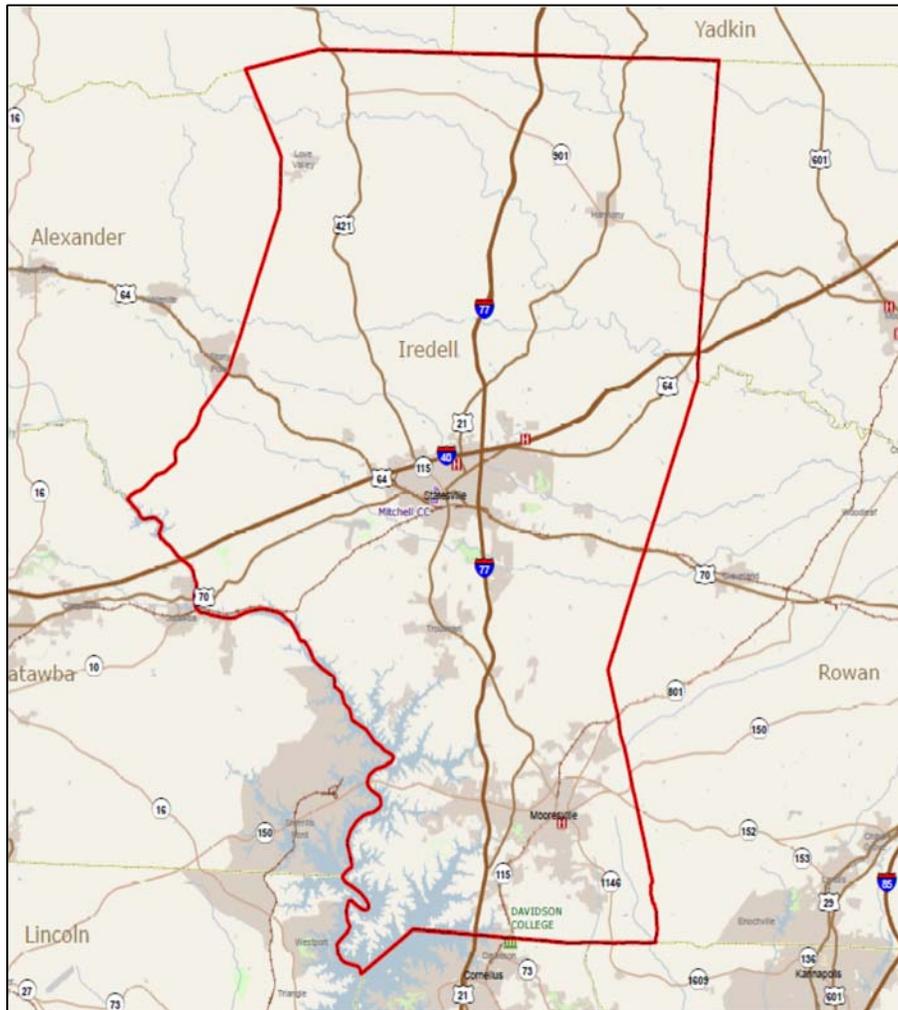
Interstate 40 and Interstate 77. Nearby areas of interest include Lake Norman, of which the northern reaches of the lake are approximately six miles south of the Airport, as well as Lake Norman State Park. The lake also delineates the southwestern border of Iredell County with Catawba and Lincoln Counties. Downtown Charlotte is approximately 37 miles south along I-77 and Winston-Salem is approximately 45 miles northeast following I-40.

Exhibit 4.16 provides an overview map of Iredell County as it relates to the greater Charlotte metropolitan area, while **Exhibit 4.17** illustrates Iredell County itself, highlighting the basic geographic locations of the Airport, downtown Statesville, the major interstates and Lake Norman. **Exhibit 4.18** represents the county boundary utilized in historical county-wide comprehensive planning efforts. In the most recent comprehensive plan, the 2030 Horizon Plan, dated November 2013, the County was subdivided into four distinct districts, the Northern District, the Statesville District, the Troutman District, and the Mooresville District.

EXHIBIT 4.16: CHARLOTTE METROPOLITAN REGION



Source: Iredell County 2030 Horizon Plan, 2013.

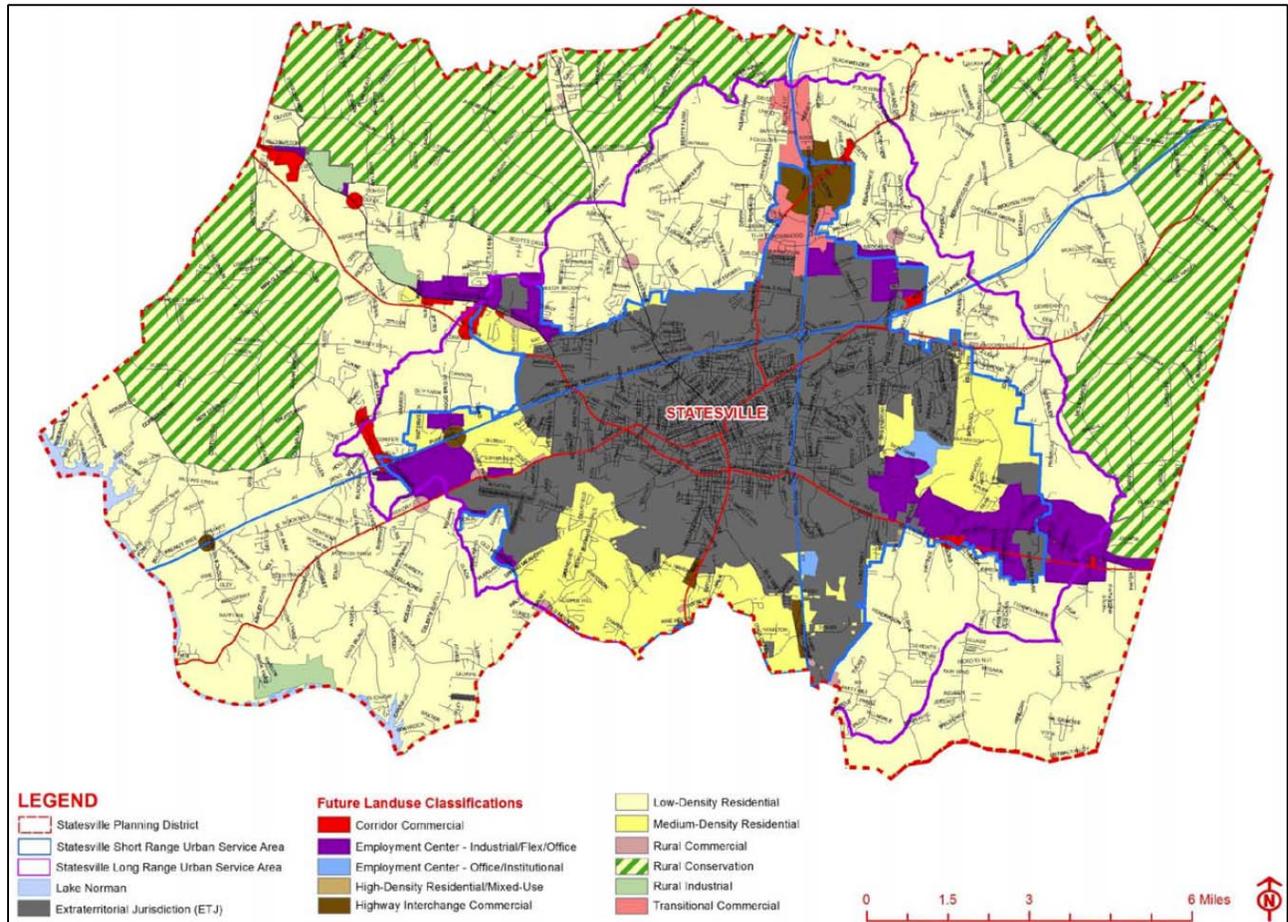
EXHIBIT 4.17: IREDELL COUNTY BOUNDARY

Source: Iredell County 2030 Horizon Plan, 2013.

The Statesville Planning District is bounded by the South Yadkin River to the north, the Statesville-Troutman annexation boundary to the south, and Iredell County boundaries to the east and west (**reference Exhibit 4.18**). I-77 and US-21 run north-south through the district, while I-40, US-70, and US-64 run east-west. The City of Statesville lies at the heart of the Statesville Planning District. The Statesville Planning District generally includes rural and agricultural lands along the edges of the district and areas that are experiencing an urban transition in and around Statesville. Parcel sizes vary widely depending on location in the District and their proximity to urban areas. Expansion of the urban zones is largely controlled by the availability of public water and sewer and the likely expansion by Statesville. Other areas of the District are supported by well water and septic service,

while limited private packaging plants provide water and sewer on a limited basis. Small private water companies provide service to residential and commercial users in the remaining areas.

EXHIBIT 4.18: IREDELL COUNTY PLANNING AREA



Source: Iredell County 2030 Horizon Plan, 2013.

Iredell County’s overall proximity to the Charlotte metropolitan core, its access to major east-west and north-south interstate infrastructure, and the overall quality of life have all been identified as strong benefits making the County an ideal location for new development. Iredell’s pro-business environment has enabled the phrase “Crossroads for the Future”, and as a result has seen the establishment of numerous corporate facilities over the past decade. The choice to locate in Iredell County is one that has been largely driven by accessibility, accessibility to interstates, rail, regional and international airports, an affordable cost of living, and local amenities (i.e., Lake Norman). According to Site Selection magazine in 2012, the Statesville-Mooresville area was the Top Micropolitan Area in the nation, and has held that position nine out of the prior eleven years.

The County has also been highly successful at marketing its amenities and securing new development. Iredell has a strong cluster of racing teams, with more than 90 percent of the NASCAR motorsports teams being headquartered in the County. This headquarters spread throughout Mooresville and Statesville have resulted in a tremendous swell of supporting industry, namely racing programs, motorsports suppliers, and technology centers. Further, 15 years ago, Lowe's Home Improvement, established its corporate headquarters just south of Mooresville, creating over 4,000 new jobs at its nearly 160-acre campus, and subsequently relocated its corporate flight department to the Statesville Regional Airport (SVH). Through additional research, it is clear that the County is also home to many other industrial operations, namely specialty plastics production, transportation equipment manufacturing, metal fabrication, and distribution.

Economic development is critical for the County to be able to provide new jobs, and maintain a balanced tax base. Tax revenues derived from businesses work to offset the increasing costs required to service residential development, providing a balancing effect on local budgets. The County and local economic developers realize that securing additional lands that are adequately serviced by public infrastructure, is paramount to luring permanent business customers. Road capacities, recreational amenities, design standards, beautification, housing affordability, and the quality of the local school systems are all factors that work to improve the quality of life and attract new businesses to a community. Iredell County and its municipalities must maintain the same business-friendly approach, thereby welcoming new corporate investment and job creation. A strong, complimentary County/City partnership is crucial to allowing Iredell and more specifically Statesville, to continue its economic competitiveness in the larger Charlotte metropolitan region.

As previously noted, Iredell County is home to several large employers operating within the Charlotte metropolitan region. As an example, the Lowe's 157-acre campus will eventually employ approximately 10,000 people, creating one of the largest corporate campuses in the 16-county Charlotte region. The county is home to several other major employers that are listed in the **Table 4.12.**

TABLE 4.12: IREDELL COUNTY MAJOR EMPLOYERS (2013)

Company	Major Product	Employees
Lowe's Companies, Incorporated	Regional Headquarters, Home Improvement Retail	8,500
Ingersoll Rand Company	Air Compressors & Related Equipment	2,796
J.C.P. Logistics	Retail Logistics	1,793
Iredell Memorial Hospital	Health Services	1,700
Iredell County	Government Services	1,335
Lake Norman Regional Medical Center	Health Services	990
Piedmont Healthcare	Health Services	700
Davis Regional Medical Center	Health Services	620
Doosan Infracore Portable Power Inc.	Wholesale Trade	600
NGK Ceramics USA Inc.	Manufacturing	540

Source: Charlotte Regional Partnership

Economic development efforts in the County have recently been focused in two areas: Mooresville-South Iredell and the Greater Statesville area that includes Troutman. Each area has an economic development corporation and chamber of commerce working together to promote corporate business development. According to the Horizon 2030 Plan, these organizations are members of the Charlotte Regional Partnership, a nonprofit, public/private economic development organization that fosters economic development within the Charlotte metropolitan region. The Charlotte Regional Workforce Development Partnership, was established to address the needs of both the workforce and the special training needs of business and industry. Located in Statesville, historic Mitchell Community College is a participating member of this partnership.

As the County and the Statesville area strategically assess growth, key challenges to sustaining development include: a declining percentage of young professionals, a need for more skilled workers, lack of design standards and beautification initiatives, decreasing availability of land for industrial development, encroachment of residential development into identified industrial/business areas, lagging wage growth coupled with an increasing cost of living, out-paced public school system, and a constrained transportation system.

A cursory review of the comparison airports, their surrounding development, and future local County and/or municipal land use and zoning plans, reveals that the Statesville Regional Airport is representative of the average among its peers. In other terms, three of the airports, Rowan County Airport, Lincoln Regional Airport, and Hickory Regional Airport are less developed, significantly more rural in comparison, and offer the potential to their respective owners to market and develop

open properties as aeronautical and non-aeronautical businesses. Conversely, Charlotte-Monroe Executive Airport, Concord Regional Airport and Rock Hill Airport-Bryant Field all have significantly more commercial and industrial development surrounding their airports. Evaluating the number and size of buildings and sites within each of the representative counties, each county boasts equally robust offerings of available commercial/industrial buildings and sites. For a host of reasons, many of which will be highlighted in the following subsections, the Charlotte-Monroe Executive, Concord Regional and Rock Hill Airports have been historically capturing more of the corporate investments near their airports when compared to the other three less developed facilities. This can be largely attributed to their proximity to downtown Charlotte and the growth patterns of the Charlotte MSA.

Each of the stronger performing airports are supported by long range compatible land use plans and zoning, and each is fortunate enough to have at least one immediately adjacent business park with plans for expansion or an additional park catering to different business sectors. The availability of nearby business parks typically brings critical infrastructure (public utilities, roadway access, and campus stormwater management plans), security lighting and signage standards, and either partially or fully graded sites ready for quick turn development. These attributes are the key differentiators for corporate relocation specialists that concentrate their search efforts near general aviation facilities that can support a corporate flight department or cater to executive flights that require quick, easy access. It is not uncommon for executives utilizing private aircraft to visit three to five locations in a single business day, so time efficiency is often paramount in determining business locations. As representative examples of adjacent business park development, **Exhibits 4.19** and **4.20** illustrate development at the Concord Regional Airport and the Rock Hill/York County Airport-Bryant Field, respectively.

EXHIBIT 4.19: CONCORD REGIONAL AIRPORT – BUSINESS PARK EXAMPLES



Source: Parrish and Partners of NC, PLLC, 2015.

EXHIBIT 4.20: ROCK HILL/YORK COUNTY AIRPORT-BRYANT FIELD – BUSINESS PARK EXAMPLES



Source: Parrish and Partners, LLC., 2015.

4.2.8 Real Estate Markets

To understand the localized potential of Iredell County and the City of Statesville, specifically as it relates to the Airport and its immediate vicinity, a review of the greater Charlotte metropolitan region is essential, given its overall impact on office and industrial development. The strength of Charlotte in the southeastern U.S. owes a great deal to its outstanding transportation infrastructure, namely the Charlotte-Douglas International Airport, the myriad of U.S. interstates and supporting highways, and the network of rail lines. Market conditions in the greater Charlotte area have kept pace or outpaced most areas of the U.S. for the last 20+ years, in an increasing fashion.

CBRE Group, Inc., the world's largest commercial real estate services and investment firm, was consulted to better understand the dynamics at play in the greater Charlotte real estate market, specifically office and industrial market potential. Around Charlotte, with new construction failing to keep pace with high absorption levels, as of 2016 the Charlotte office market is entering expansion mode and experiencing declining vacancy rates and rising asking rates. This is being driven by the region's rapid job creation, particularly from companies relocating to the area. This tenant demand has helped bring vacancy rates to pre-recession lows. Based on data pertaining to tenant activity, more than 30% of demand is a result of in-migration from outside the Charlotte market area. Features such as low cost of living, an educated workforce, a business-friendly climate, and a large hub airport should continue to draw companies from across the country to Charlotte. **Exhibits 4.21 and 4.22** illustrate these dynamics being experienced and projected to continue over the next couple of years.

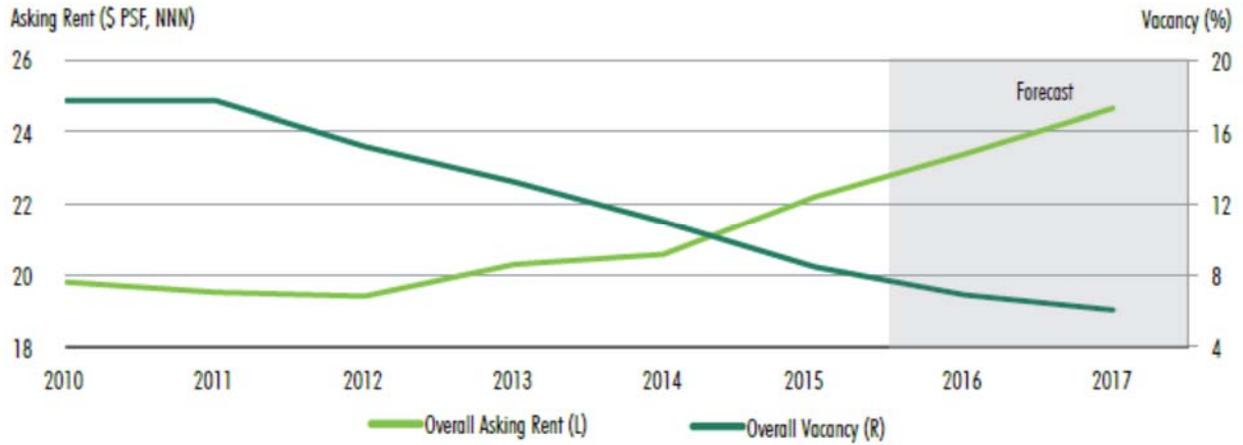
Approximately 50% of the U.S. population lives within a one-day drive of Charlotte, making industrial space desirable to large distributors. The expansion of the Norfolk Southern intermodal facility at the CLT should further benefit the industrial market by improving access to key ports such as Savannah and Charleston and by attracting tenants to the market that may not have considered Charlotte in the past. Additionally, with a population over two million, there is a considerable consumer base for final segment distribution. Recent record market activity has vacancy poised to hit a record low. Space availability is allowing landlords more leverage, pushing lease rates to a record high, especially for those with Class A warehouse availabilities—modern facilities with in-demand amenities (i.e., 30-foot clear heights). These rates are expected to rise further in the next two years. **Exhibits 4.23 and 4.24** illustrate the impact that supply and demand is having on

industrial space through the end of 2017. Bare any future recessionary periods or incidents of uncertain national or global economic downturn, the greater Charlotte metropolitan area should continue to see steady and oftentimes strong growth in the commercial and industrial sectors.

As of 2013, Iredell County was home to 13 business/industrial parks: eight of which are located in the Mooresville-South Iredell market while five are within the Greater Statesville area. Because of significant growth in Southern Iredell, there are few remaining large tracts of land for development. As land in the south builds out, demand for land in the Greater Statesville region is expected to increase. A query of online resources managed by the Statesville Regional Development Corporation, revealed over 30 industrial/commercial buildings available for sale or lease and nearly 60 discrete sites throughout the area available for purchase and development. The stated target sectors by the Corporation include: Life Sciences, Transportation & Logistics, Food & Beverage, Advanced Manufacturing Metal Fabrication, and Automobile & Truck Parts. Each of these target sectors currently has several resident companies of either regional or national significance.

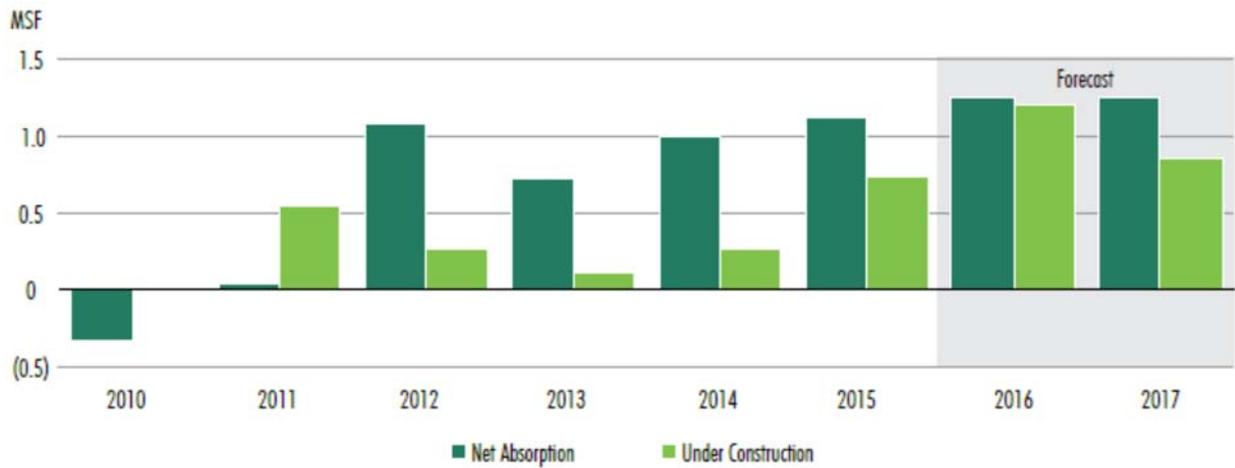
In relation to the other comparison airports, Statesville Regional Airport should closely parallel the Charlotte-Monroe Executive Airport, the Concord Regional Airport and the Rock Hill Airport-Bryant Field in terms of growth potential in the coming 20-year horizon. The industrial/commercial real estate environment at these three airports is slightly more mature as a result of their proximity to the Charlotte metropolitan core, their access to rapidly growing affluent communities, higher per capita income levels, more complete infrastructure, available residential offerings, a nearby skilled work force, and public school systems. Although these components may not all exist in the Statesville area at present, over time as demand metrics begin to point toward an uptick in corporate interest, the City and County partnership will become critical in formulating a strategic initiative to enable nearby business parks. All of these elements are expected to be in place in and around Statesville in the near to mid-term time period. The following subsections will outline opportunities that should be explored in more detail, through a district-wide economic development strategy for right-timed implementation.

**EXHIBIT 4.21: CHARLOTTE AREA - OFFICE
OVERALL ASKING RENT AND OVERALL VACANCY**



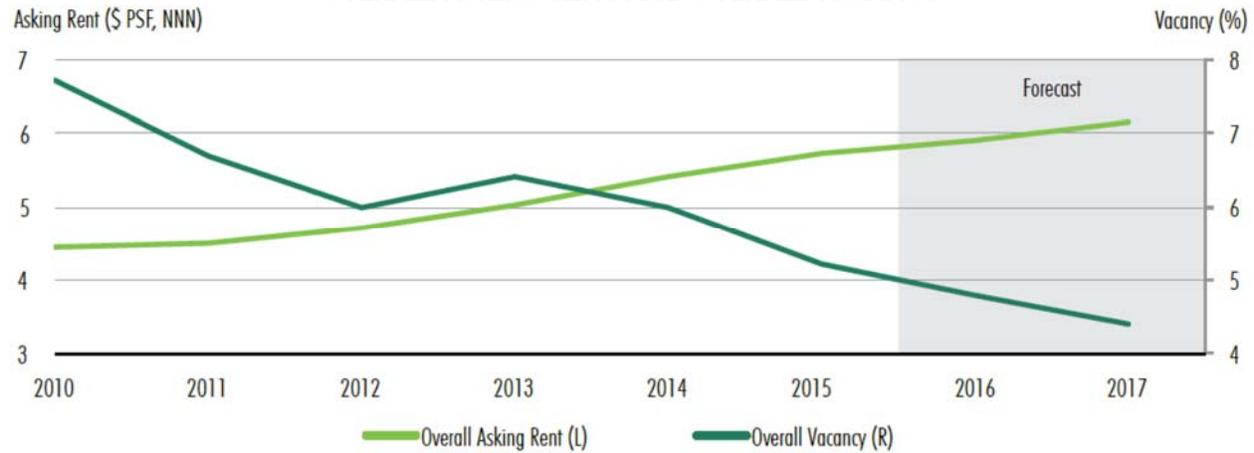
Source: CBRE Research, Q2 2015.

**EXHIBIT 4.22: CHARLOTTE AREA - OFFICE
OVERALL NET ABSORPTION AND SF UNDER CONSTRUCTION**



Source: CBRE Research, Q3 2015.

**EXHIBIT 4.23: CHARLOTTE AREA - INDUSTRIAL
OVERALL ASKING RENT AND OVERALL VACANCY**



Source: CBRE Research, Q3 2015.

**EXHIBIT 4.24: CHARLOTTE AREA - INDUSTRIAL
OVERALL NET ABSORPTION AND SF UNDER CONSTRUCTION**



Source: CBRE Research, Q3 2015.

4.3 MARKET POTENTIAL

Off-Airport, Non-Aeronautical Development: Assessing the market potential of the Airport vicinity attempts to identify tangible assets and land use availabilities which will ultimately drive land use alternatives and implementation strategies. The single largest asset to the City and the Airport is location and accessibility. The City of Statesville and the Statesville Regional Airport (SVH) are located at the approximate midpoint of Iredell County, positioned near the intersection of two major interstates; I-40 running east-west and I-77 running north-south. Access to the Airport from the I-40 corridor is provided

directly from the Stamey Farm Road interchange approximately 1.2 miles to the north. The US-64/Garner Bagnol Boulevard interchange at I-40 is only 2.5 miles to the northeast. Furthermore, I-77 may be accessed east of the Airport via a short 5.5 mile drive. Additional roadway infrastructure surrounds the Airport and provides access in all directions. Barely a mile to the east is an operating rail corridor for freight that provides access to the nearby Norfolk Southern network. Further east by 25 to 30 miles near the I-85 corridor, travelers may access AMTRAK in Salisbury, NC.

The Statesville Regional Airport (SVH) area is characterized by rolling topography consisting mostly of farmland and low density residential land uses. Numerous commercial and light industrial land uses exist immediately adjacent to and north of the airport, while further north along I-40 at the various interchanges, are a mix of commercial and industrial properties. The US-64/Garner Bagnol Boulevard interchange at I-40 accounts for the vast majority of commercial and industrial land uses west of Statesville. **Exhibit 4.25** illustrates the major highway corridors and key intersections/interchanges in close proximity to the Airport. Commercial and industrial development often cluster near intersection/interchange nodes and major highway corridors due in part to improved accessibility, lack of interest in properties for residential development, land values, and development opportunities. Fortunately, County and City growth has not reached a pace that residential growth poses a significant threat to commercial and industrial development opportunities in these areas.

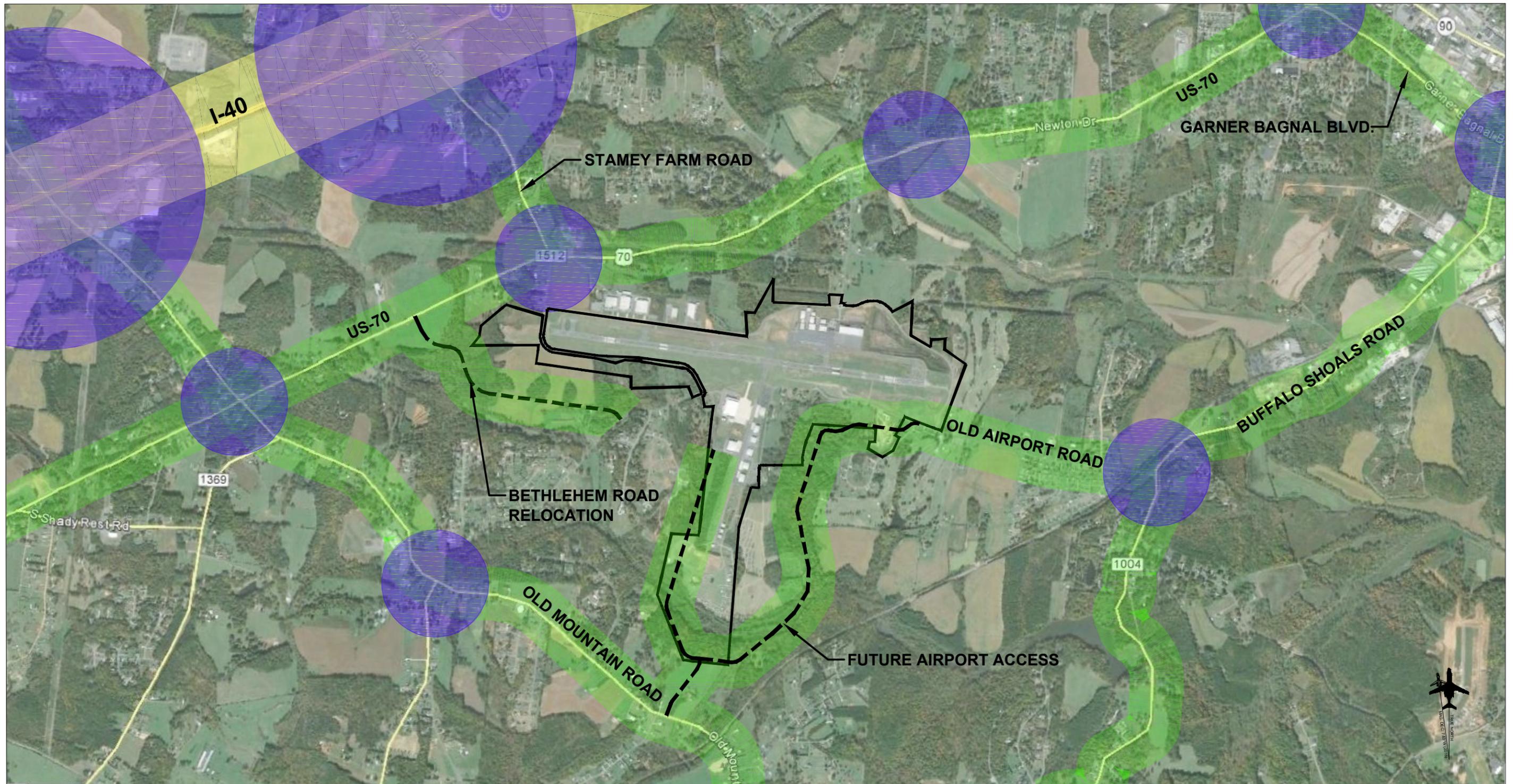
This market analysis does several things, notably:

- Determines valuable access corridors and developmental nodes,
- Identifies low density land uses in the vicinity of the Airport that
 - Serve future single facility development, or
 - In the case of larger tracts, serve as candidates for strategically developed business parks,
- Assesses and leverages possible connectivity with the Airport, and
- Determines potential business sectors that the City and Airport should focus marketing efforts toward.

Much information about the future, particularly when measured over the next 20 to 30 years, is speculative at best; however, given Iredell's alignment with the Charlotte metropolitan region, the socioeconomic

outlook for the Charlotte MSA, and the economic forecast by one of the nation's leading real estate experts, Iredell's future is very bright. Looking back at the past five to ten years, the one thing that appears to be a near certainty is that the dramatic population and employment growth is likely to continue in the northern Charlotte metropolitan area. Combining the demographics, the physical pattern of growth, and the land available to accommodate such growth paints a very clear picture of opportunity for Iredell County, and more importantly Statesville, as southern Iredell is becoming saturated in areas. This suggests the need to plan comprehensively and to diligently capitalize on that opportunity. Focusing attention and effort at the front end of an expected growth curve is critical to ensuring that population growth and job growth take place in a manner that is responsive to unpredictable and uncontrollable market conditions. Such attention is also critical to ensuring that growth is consistent with resources, particularly capital, natural resources, and infrastructure, whether or not those resources are currently available. Such upfront attention also helps ensure that growth will take place with appropriate integration of neighboring communities and uses, and with a view that goes beyond and outside the Airport study area.

Absent a major unexpected change in the global, national, and regional economies, population and job growth will continue to advance into the central and northern areas of Iredell County. Careful planning with a simultaneous eye to the near term and the long term is essential. Successful communities consist of a broad spectrum of uses and activities—commercial, retail, industrial, institutional, infrastructure, recreational, and open-space. Successful and desirable communities are the ones that balance these uses appropriately. Infrastructure components such as transportation networks, water and wastewater services, power resources, airports, colleges and universities, and health care facilities are all essential in creating those successful and desirable communities.



Further, attracting prospective facility builders and tenants to Statesville may require the designation of areas for industrial and commercial development. Identifying areas that have desirable access to major highways and rail, are absent environmental constraints, are adequately serviced by key utilities infrastructure (i.e., water, sewer, electricity, gas and communications - ideally fiber), and are not topographically challenged. In key instances strong consideration should be given to strategically preparing planned commercial/industrial business parks, including paved access, stubbed utilities, and mass graded sites. More select treatment may be considered for individual tracts, on a case-by-case basis, such as on-Airport property or proximate areas to the Airport. Initial site development is often key to allowing prospective owners to envision a facility. Although this upfront investment can be costly, in the case of the Airport it ensures a long term revenue stream for land leases, ensures compatibility with aviation operations, and often brings much needed employment, tax revenues to the City and County, and may result in a positive uptick in operations and services.

Understanding the socioeconomic trends that are affecting the Airport area will assist in identifying the potential and pressure for future land uses. Successful planning and land use policies can best be described as public action that generates a desirable, widespread, and sustained private market reaction.

As noted earlier, the Statesville District outpaces North Carolina in terms of job growth, per capita personal income, and business growth. An analysis of the various employment sectors reveals that manufacturing, construction, health care, automotive and trucking parts lead market trends in the area. Few of these sectors depend heavily on the Airport while average salaries lag those of other sectors. Oftentimes, planners and economic development experts determine that market segments that perform well in the vicinity of airports, are ones that utilize time critical shipping, or that have high value products with a high value to weight ratio. These business types include: biomedical research and manufacturing, new technology energy research and production, specialized engine parts manufacturing, and logistics warehousing.

Along with these types of corporate business development, follows residential growth, retail, hotel, and recreational facilities (golf courses, nature walking & biking trails, etc.). Other eventual land uses to plan for may likely include healthcare facilities (hospital, medical office complexes, etc.) as well as higher education facilities. Conservative estimates of building area to employment range between 250 to 450 sf per person, for office and light commercial/industrial uses. In other words, for every 1 million square feet of space constructed, the City/County may expect approximately 2200 to 4000 new employees.

The Airport area has strong potential to accommodate a variety of higher-intensity and higher-value real estate development. Over a 20 to 30-year planning horizon there may be a need for significant commercial and industrial lands, along with new hotels and possible conference spaces. Residential needs should also be accounted for given the nature of the business sectors that will likely transition into the area. Planning for a variety of single-family, townhome, condominium, rental apartment, and mixed-use projects will be necessary. Many of the large tracts of farmland, if developed, should be considered for mixed use development that encourage a live-work-play concept.

On-Airport, Aeronautical Development: As a part of the ongoing ALP Update Narrative Report (under separate contract), numerous options for future airside and landside development have been considered. It is imperative that the Airport advance the design and construction of the south side parallel taxiway to Runway 10-28, as this enhances safety for operators by reducing runway incursions and it also provides much needed access for developing properties south of the runway. This access along with carefully oriented development will establish over time a large concentration of aeronautically focused businesses, south of Runway 10-28 and east and west of Taxiway Foxtrot. The north side of the Airport is very constrained to continued growth due to existing property extents, terrain, access roads and off-airport businesses. There is limited room for terminal enhancements and surface parking additions. Plans have been noted by SFS to augment the existing hangars with one to two additional bulk hangars in the 5-10,000 square foot size; however, likely at the expense of existing hangar apron area circulation and overall operational flexibility. For these limiting reasons, long range aeronautical development at SVH is recommended south of Runway 10-28. **Exhibits 4.26** illustrates the overall airport growth plan through the Airport Layout Plan sheet, for airside and landside facilities over the next 20-year period and in many cases well beyond. **Exhibit 4.27** provides a more detailed, larger scale, depiction of the same planned development in the areas either side of Taxiway Foxtrot.

Of special note is the degree of flexibility illustrated by both exhibits, namely the areas west and south of Lowe's Aviation facilities. These designated areas are recommended to include near term property acquisition by the City/Airport and to be reserved for large corporate aviation facilities similar to Lowe's or for MRO, or larger aircraft manufacturing facilities which require much larger acreage for airside staging, single or multiple hangars and shops, and vehicular parking to support 100+ employees and patrons. Two tract sizes of 5 acres and 10 acres are depicted as samples. As demand warrants, these tracts may easily be combined into areas between 10-50 acre sites. It is suggested that the City advance the purchase of property

in this area, and identify two of the smaller tracts to prepare for market, complete with access, trunk utilities and mass graded sites. The nature of this market is such that each MRO or manufacturing company is highly specialized and typically needs specific hangar and shop sizes and site layouts. Therefore advancing with spec facilities is ill advised and risky at best. The former Newell Rubbermaid hangar, south of Lowe's, may serve as a solid interim base of operations for some seriously interested tenants, provided leasing terms are able to be resolved; however, since these facilities were designed to support corporate flight operations, they will have limited value to prospective MRO and manufacturing tenants.

Air cargo operations are another area of possibility for the area west of Lowe's, albeit limited in nature. Air cargo shippers rely heavily on freight forwarding companies, their network and close proximity. More importantly, air cargo relies on steady and varied demand which requires air shipment. This typically translates into smaller, lighter, high dollar items that possess a just-in-time delivery need. The City, the Airport, and the surrounding areas within a 15-30 minute drive have not yet evolved with that critical mass. The future presence of air cargo operations at SVH will most likely develop as smaller operations to support vehicle and specialty parts, IT components, biomedical supplies, etc., and can easily be executed from a larger corporate hangar. The sites immediately south of the Lowe's hangar on the west side of Taxiway Foxtrot are ideal to fit this specification.

The plans for the larger southeast quadrant of SVH support continued development for general aviation and corporate activity. This growth plan, if realized should support either the relocation of SFS FBO to the south side or possibly a second FBO on the field. Therefore a new GA terminal facility is reserved along with central access and parking. This complex provides for significant bulk hangar development as well as smaller individual corporate hangars of various sizes. Along the easternmost areas, hangar sizes may support Specialized Aviation Service Operators (SASO, which provide no more than two specialized services and do not compete with FBO services), commercial air charters, etc. Further, based on recent and ongoing discussions between the City and two prospective tenants, one a charter operator and the other an aircraft refurbisher, an area at the southeastern corner of Taxiway Foxtrot has been reserved for this potential development. Many of these areas will require additional land acquisition and overall site grading and utilities to support their development, but they both will mean added services to SVH and increased employment. Much like the western areas of the plan, it is recommended that the City consider advancing with the necessary land acquisition, roadway relocations and tie-ins to the south along with much needed utility services and mass grading of the chosen sites. Preparing a couple sites along the future parallel

taxiway to Runway 10-28 should facilitate interest and provide airport staff with shovel-ready sites to market to prospective tenants.

4.4 DEVELOPMENT STRATEGIES AND IMPLEMENTATION

The Development Strategies section describes the variety of uses and considerations for locating such uses within the Airport study area. The success of the development in the vicinity of the Airport will require vision, bold moves, and dedicated leadership. Development strategies need to balance the desire for short-term economic growth with the long-term role that the Airport plays in the City and the larger County.

The study area is one of the most promising expanses of underdeveloped land north of the Charlotte metropolitan area. Already the northern arc of the Charlotte metropolitan area is being recognized nationally as outpacing the vast majority of other urban areas. The consultant recommends master planning many of the areas for mixed-use development with business, research, light commercial/industrial, hospitality, retail, and residential uses. The development should be of higher quality resembling much of the recent downtown restoration work, and incorporating sustainability components. The area will likely garner a higher than normal percentage of growth, similar to Mooresville, for the foreseeable future. **Exhibit 4.28** provides a summary of an analysis of generally open areas with limited restrictions on development, while having excellent access to the major roadway network. Many of the seven large tracts identified are suitable for full scale business parks combined with mixed use development.

To accomplish such an ambitious plan, the financial and governance structures must be innovative and comprehensive, as the plan itself must be innovative and comprehensive in its scope. The success of developing these areas depends a great deal on more private sector participation in the execution and capitalization of the study area than has taken place to date.

Ideally the seven areas could be integrated and stitched together to form a cohesive plan. The golf course east of the Airport provides an excellent recreational area that can be expanded with paved walk/bike pathways connecting the other nearby areas. Areas north of the airport (sites 1, 6 and 7) should be reserved for commercial/light industrial business park development. Nearby residential areas should be buffered from heavy traffic and noise generating areas. Sites 2 and 5 are best suited for true mixed use development, merging uses of residential, retail, commercial and office spaces. Sites 3 and 4, given their proximity to rail

may be better suited for commercial/light industrial business parks combined with an adjacent mixed use complex of lesser size than sites 2 and 5. Proximity of the rail connection could provide a link to air and truck transportation, providing a means for moving imported goods throughout the western and central North Carolina and beyond.

It is anticipated that most users within the Airport area will demand high-speed communication services. To be competitive with other centers, the study area should have cutting-edge service, by providing fiber optic service and wireless coverage connections throughout each of the sites/centers simultaneously with construction of other infrastructure improvements.

Appropriate zoning, based on a comprehensive, strategic master plan for the Airport study area, is recommended to support the many uses envisioned in the area. To support this, overlay zones are often used. Overlay zones set general planning parameters, specific land use criteria, and even thematic design standards. It is recommended that the City and County work together to place overlay zones on all property within the study area. Additionally, the overflight zones should be protected through compatible commercial and industrial uses, such as warehousing, distribution operations, shipping facilities, and ground logistics, all of which are ideal candidates for using large vacant acreage.

As to business sectors, care must be taken to avoid over reliance on high-tech manufacturing, which may be subject to offshore competition. Research in biotech, in concert with programs at regional colleges and universities, could replace such manufacturing and even enhance the technology reputation of the area.

It is important to note that the Airport may not immediately benefit from much of the non-aeronautical business development occurring around and throughout the Airport area. City and Airport leadership should constantly re-evaluate the long-term viability of the Airport and its benefit to its constituent owners and the study area. The Airport may likely require additional capital funding or investment that will not be covered by the FAA, NCDOT or other supplemental funding, and may require the City to seek outside help to increase its operations and development capability to achieve profitability. It goes without saying that the City and County leadership recognize that the value of the Statesville Regional Airport (SVH) to the region, its tenants, and its users goes far beyond its dollars-and-cents profitability.



Date

Revisions

No.

NOTES & APPROVALS:

DRAFT

EXHIBIT 4.26

EXISTING AND ULTIMATE AIRPORT LAYOUT DRAWING

STATESVILLE REGIONAL AIRPORT (SVH)



STATESVILLE, NORTH CAROLINA



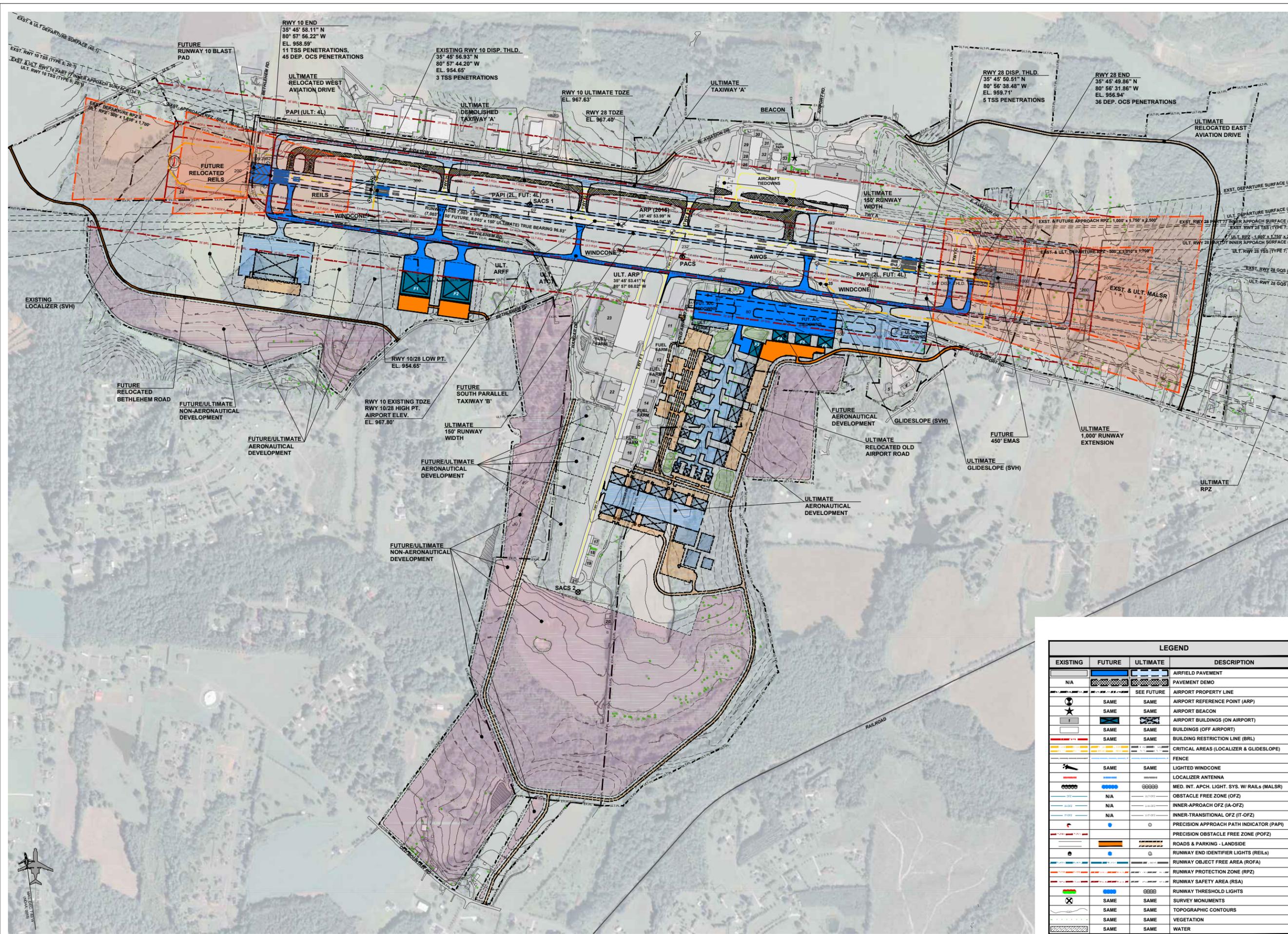
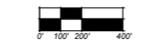
DRAWN: RJL

APPROVED: MDF

DATE: 7/2016

SHEET: 2 of 12

SCALE: 1:400



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[Symbol]	[Symbol]	[Symbol]	PAVEMENT DEMO
[Symbol]	[Symbol]	[Symbol]	AIRPORT PROPERTY LINE
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[Symbol]	[Symbol]	[Symbol]	BUILDINGS (OFF AIRPORT)
[Symbol]	[Symbol]	[Symbol]	BUILDING RESTRICTION LINE (BRL)
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[Symbol]	[Symbol]	[Symbol]	SURVEY MONUMENTS
[Symbol]	[Symbol]	[Symbol]	TOPOGRAPHIC CONTOURS
[Symbol]	[Symbol]	[Symbol]	VEGETATION
[Symbol]	[Symbol]	[Symbol]	WATER



EXISTING BUILDINGS/FACILITIES		
NUMBER	TOP EL. (MSL)	OCCUPANT
11	989.30'	HANGAR/OFFICE - CHAMPION AIR
12	986.10'	HANGAR/OFFICE - JRM AIR, LLC.
13	975.60'	HANGAR/OFFICE - NELSON/SIGMON
14	989.80'	HANGAR/OFFICE - GB AVIATION LEASING
15	980.00'	HANGAR/OFFICE - CHECKERED FLAG AVIATION
16	975.30'	HANGAR/OFFICE - SUN ENERGY
17	947.90'	HANGAR/OFFICE - CHRIS & ROGER COMER
18	948.80'	HANGAR/OFFICE - GRIER A. LACKEY
19	944.70'	HANGAR/OFFICE - CIVIL AIR PATROL
20	909.90'	INDUSTRIAL/OFFICE - CITY MAINTENANCE
21	942.30'	HANGAR/OFFICE - JAMES HURD & JOHNNY BEAM
22	988.00'	HANGAR/OFFICE - SFS (SUB TO NEWELL RUBBER.)
23	1007.80'	HANGAR/OFFICE - LOWES CORPORATE AVIATION

Date

Revisions

No.

NOTES & APPROVALS:

DRAFT

EXHIBIT 4.27

TERMINAL AREA PLAN - SOUTH

STATESVILLE REGIONAL AIRPORT (SVH)



STATESVILLE, NORTH CAROLINA



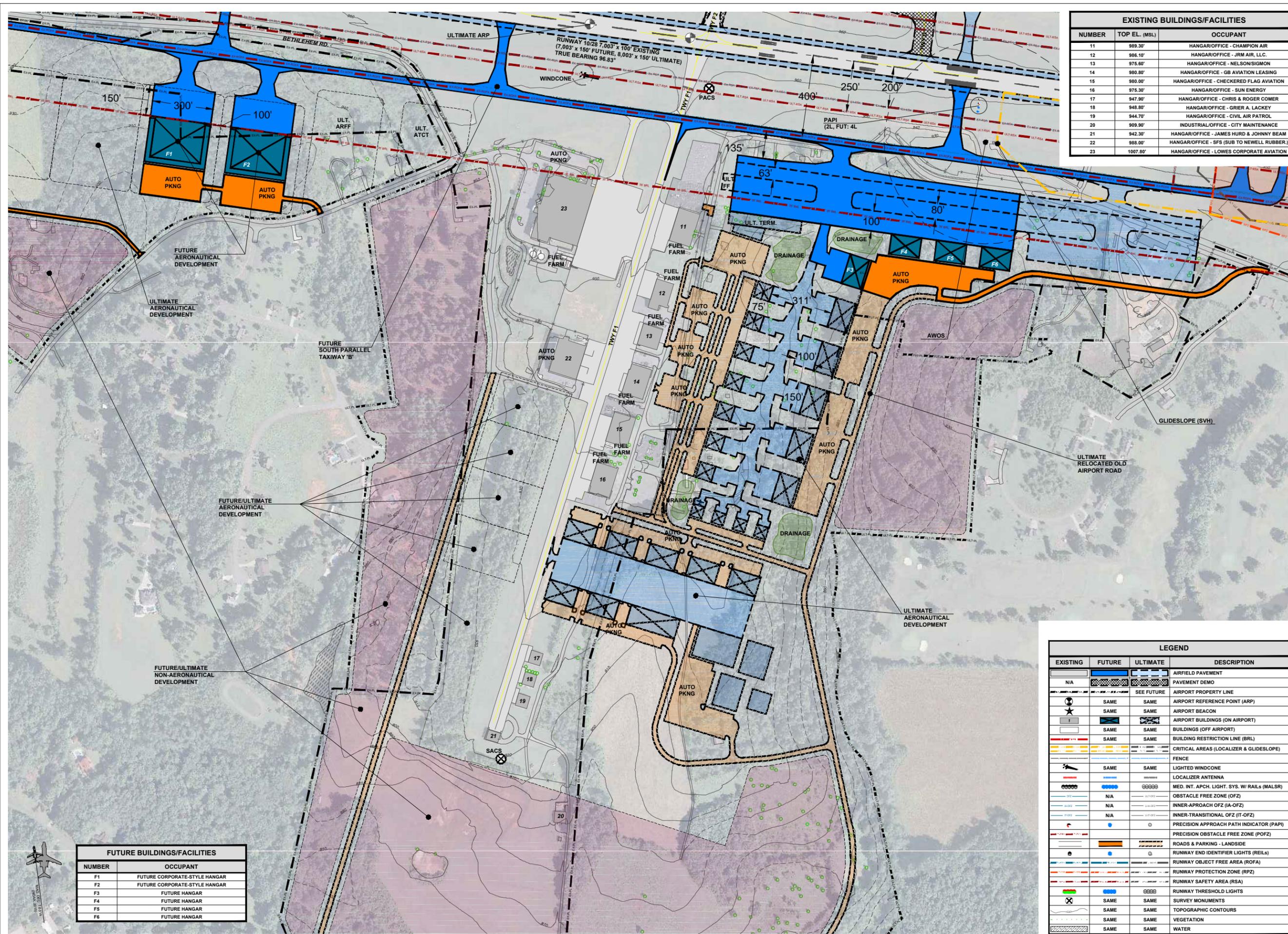
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APPROVED: MDF

DATE: 7/2016

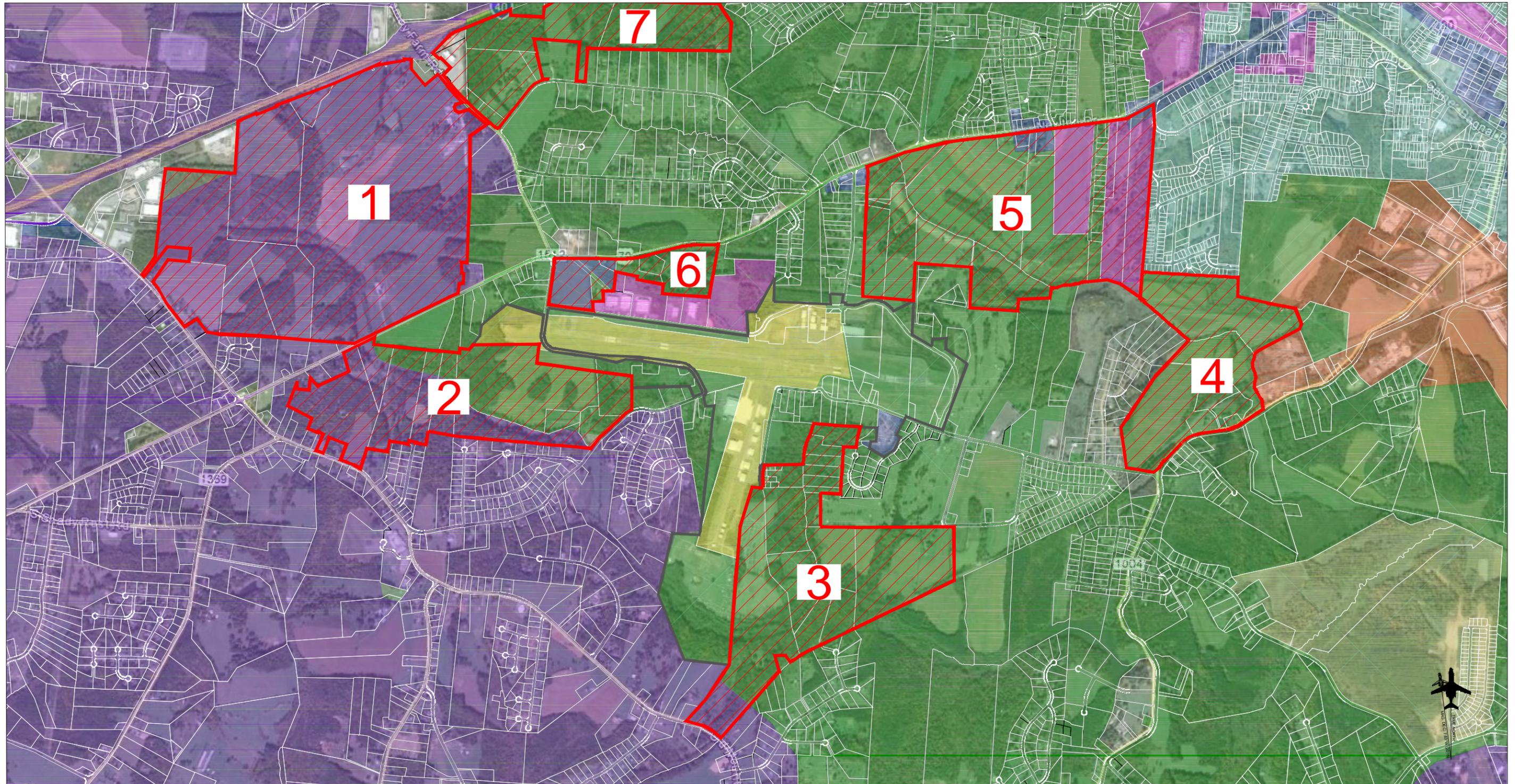
SHEET: 5 of 12

SCALE: 1:200



FUTURE BUILDINGS/FACILITIES	
NUMBER	OCCUPANT
F1	FUTURE CORPORATE-STYLE HANGAR
F2	FUTURE CORPORATE-STYLE HANGAR
F3	FUTURE HANGAR
F4	FUTURE HANGAR
F5	FUTURE HANGAR
F6	FUTURE HANGAR

LEGEND			
EXISTING	FUTURE	ULTIMATE	DESCRIPTION
N/A	[Symbol]	[Symbol]	AIRFIELD PAVEMENT
[Symbol]	[Symbol]	[Symbol]	PAVEMENT DEMO
[Symbol]	[Symbol]	[Symbol]	AIRPORT PROPERTY LINE
[Symbol]	[Symbol]	[Symbol]	AIRPORT REFERENCE POINT (ARP)
[Symbol]	[Symbol]	[Symbol]	AIRPORT BEACON
[Symbol]	[Symbol]	[Symbol]	AIRPORT BUILDINGS (ON AIRPORT)
[Symbol]	[Symbol]	[Symbol]	BUILDINGS (OFF AIRPORT)
[Symbol]	[Symbol]	[Symbol]	BUILDING RESTRICTION LINE (BRL)
[Symbol]	[Symbol]	[Symbol]	CRITICAL AREAS (LOCALIZER & GLIDESLOPE)
[Symbol]	[Symbol]	[Symbol]	FENCE
[Symbol]	[Symbol]	[Symbol]	LIGHTED WINDCONE
[Symbol]	[Symbol]	[Symbol]	LOCALIZER ANTENNA
[Symbol]	[Symbol]	[Symbol]	MED. INT. APCH. LIGHT. SYS. W/ RAILs (MALSR)
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[Symbol]	[Symbol]	[Symbol]	PRECISION APPROACH PATH INDICATOR (PAPI)
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[Symbol]	[Symbol]	[Symbol]	TOPOGRAPHIC CONTOURS
[Symbol]	[Symbol]	[Symbol]	VEGETATION
[Symbol]	[Symbol]	[Symbol]	WATER



ZONING LEGEND:

- LOW DENSITY RESIDENTIAL
- MEDIUM DENSITY RESIDENTIAL
- HIGH DENSITY RESIDENTIAL
- LIGHT INDUSTRIAL

- HEAVY INDUSTRIAL
- BUSINESS
- OFFICE/INSTITUTIONAL
- AIRPORT

- OTHER / MIXED USE
- NOT ZONED
- POTENTIAL COMMERCIAL / INDUSTRIAL DEVELOPMENT AREAS

STATESVILLE REGIONAL AIRPORT
STATESVILLE, NC

EXHIBIT 4.28: NON-AERONAUTICAL / BUSINESS PARK
OPPORTUNITIES - AIRPORT VICINITY



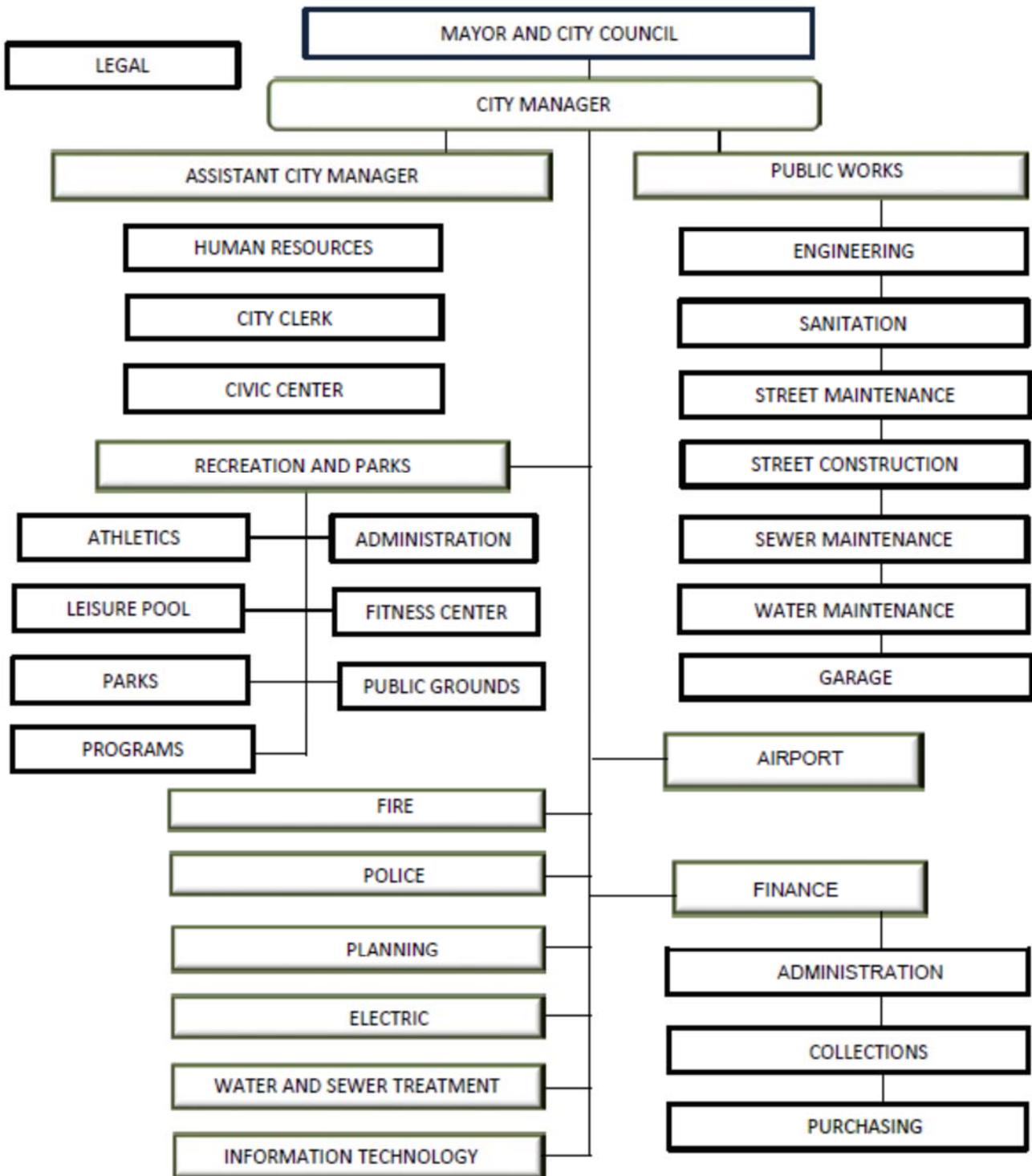
4.5 CONCLUSIONS AND RECOMMENDATIONS

All indications point to a strong potential for growth at the Statesville Regional Airport, both in the near-term as well as the long-term. Population, per capita income and overall new business growth are projected to exceed North Carolina and U.S. averages in the coming 20 years. The proximity and overall influence of the greater Charlotte metropolitan region is a key driver, as is the unparalleled access to the U.S. interstate system. All of these items bolster the attractiveness of Iredell County and more specifically the City of Statesville. From an aeronautical perspective, SVH has a compliment of assets in its runway, taxiway network, runway instrumentation, basing facilities, fixed base operator and largely compatible surroundings, which makes it very attractive to corporate operators and companies considering possible new locations to base their operations. From a non-aeronautical business perspective, SVH and its surroundings present a multitude of options; namely, large, rural tracts with very good access to the interstates and other major thoroughfares, and close proximity to a fully capable airport with 7,000 feet of runway to support most transcontinental operations.

Given these tangible strengths and the many opportunities that lie ahead for the County, City and Airport, the following outlines a series of key recommendations for consideration by the City relative to the Airport.

Administration and Operations – The organizational assessment determined a need to slightly modify the organizational structure of the City as it relates to the Airport. Shifting the reporting hierarchy of the Airport Manager and the Airport to the City Manager will facilitate more direct communication with all City Departments and will support a higher level of responsibility by airport staff. This structure should also enable the City to attract and retain airport administrative and operational professionals, whereby their daily commitment is to the betterment of the Airport, the collaborative business growth of the City and County, and the support of social responsibility. As of this document's final publication, the City has in fact hired a professional airport manager, and made the recommended organizational structure changes to have the Airport and its managerial functions report directly to the City Manager. Exhibit 4.29 depicts the new organizational structure in place within the City, relative to the Airport.

EXHIBIT 4.29: CITY OF STATESVILLE – MANAGERIAL ORGANIZATIONAL STRUCTURE (2016)



Source: City of Statesville, Municipal Operating Budget (Fiscal Year 2016 – 2017).

Other notable initiatives that should be undertaken or maintained relative to the Airport, include:

- Staffing plan: devise a near term and long term staffing plan for airport administration and operations to support Airport growth. The plan should include complete position names and basic job descriptions. Metrics should be developed which describe triggers to highlight the timing of any new additions. A succession strategy for key positions should also be outlined.
- Rates and Charges: as the Airport grows and infrastructure is expanded, the need for maintaining facilities is imperative. Airport administration and the FBO should collaborate on determining appropriate rates and charges that are both competitive and supportive of maintaining valuable assets. Items of consideration include but are not limited to, landing fees, ramp tie-down fees, transient ramp fees, hangar storage fees, and fuel flowage charges.
- Future tenant leases: historical leases have permitted numerous major tenants to develop, own and operate their own fueling systems. Although attractive to tenants, this has resulted in a potential loss in revenue to the FBO operation, and consequently had a possible negative impact on FBO operations, services and the ability to invest in growth plans. It is recommended that future standards and policies in leasing reconsider this tenant capability and analyze the pros and cons of requiring future tenants to purchase fuel from the FBO.
- Minimum Standards: every successful airport is supported by sound operational and development standards that govern the conduct of all aeronautical businesses located on the Airport. The Airport staff should revisit the minimum standards and provide a comprehensive update that addresses areas impacting facilities, operational performance, services, etc., to ensure a consistent level of expectations for all tenants. A change to tenant fueling may require that existing operations with fueling be "grand-fathered" into the standards.
- Rules and Regulations: similar to minimum standards, the rules and regulations used to govern the tenants and their operational behaviors should also be evaluated and updated, as needed, to ensure that a high level of standards are maintained.
- Economic Development Partnering: establish a regular, standing coordination effort, with bi-weekly meetings that focus on enhancing the synergies between the Airport growth initiatives and those of the City/County. Track the status of land purchases, inquiries, upcoming visits, action items, etc.
- Charter and Air Carrier Services: currently SVH is fortunate to be serviced by companies that provide non-scheduled and scheduled charter services. The Airport and the FBO should continue to strive to support these activities to the greatest extent possible, as they provide unparalleled access to

the rest of the U.S., often unserved by commercial air service. Commercial air service is currently provided at the Charlotte-Douglas, Piedmont Triad (Greensboro), and Concord Airports and all are within a one-hour drive and provide outstanding access to most large U.S. and international markets on mainline air carriers as well as a few low-cost air carriers. It is not recommended at this time that the City consider scheduled air carrier service due to this competition and the likelihood that ridership will be wholly inadequate to entice a viable carrier. Future considerations should be studied as population growth continues and the air service market in the region evolves.

- FAA NPIAS Designation: currently SVH is identified in the National Plan of Integrated Airport Systems (NPIAS) as a General Aviation with a Regional service level. Among many things, this designation guides FAA in allocating funding to SVH, whereby the City/Airport currently receives non-primary airport entitlements of \$150,000 annually, administered by NCDOT-DOA. Beyond the typical General Aviation service level designations, General Aviation airports may also be classified as a "Reliever" facility. A Reliever airport is a designation established by the FAA and included in the NPIAS. Due to different operating requirements between small general aviation aircraft and large commercial aircraft, general aviation pilots often find using a congested commercial service airport can be difficult. In recognition of this, FAA has encouraged the development of high capacity general aviation airports in major metropolitan areas. These specialized airports, called "relievers", provide pilots with attractive alternatives to using congested hub airports. They also provide general aviation access to the surrounding area. To be eligible for reliever designation, an airport must have 100 or more based aircraft, handle at least 25,000 itinerant operations or 35,000 local operations annually (either at present or within the last 2 years), and must be located in an SMSA with a population of at least 500,000 or where passenger enplanements reach at least 250,000 annually. As the Charlotte metropolitan area continues to expand and as operations at Charlotte-Douglas International Airport also increase, FAA will undoubtedly consider assigning other airports in the region with the Reliever Airport service level designation. Leading up this, the Airport should investigate pursuing and achieving this designation and what it could mean for the Airport and its future. Based on forecasts, the Airport may achieve the based aircraft and operational thresholds near or closely following the 20-year planning horizon. As this time approaches, the City should consider doing the following: 1) approach and coordinate the designation with the NCDOT-DOA, 2) seek to obtain approval of the request from the City of Charlotte and its Department of Aviation, 3) separately meet with the FAA's Airports District Office to express strong interest in advancing to this level of service, 4) prepare a letter of consideration to the FAA ADO clearly indicating how the

criteria is or will be met along with growth statistics in the Charlotte region, and 5) schedule a trip for City leadership to visit Washington, DC to meet with FAA Headquarters and NC congressional leaders to outline the request and seek support for the pending action.

Infrastructure – The upkeep of the Airport facilities is crucial to attracting and maintaining tenants. A regular focus on proactive management of the Airport’s Capital Improvement Program which is on file with the NCDOT-DOA and FAA is essential to being considered for current and future funding, through both entitlement as well as discretionary programs. The following initiatives should be top priorities for the Airport.

- ➔ Airfield: prioritize a safe runway and taxiway network such that all FAA criteria for the Airport’s design aircraft are maintained free and clear of any issues or violations. Work to reduce and eliminate any modifications to standards. Maintain all navigational aids, lighting, and signage. Put in place an active program to identify and remove all obstructions to air navigation, and partner with City Planning to ensure that the City’s land use and zoning provides overlay zoning around the airport to address height and hazard. Advance the development of the south side full length parallel taxiway to Runway 10-28 to support safe and efficient airfield movements for tenants located south of the runway complex.
- ➔ Landside: develop a routine maintenance program that monitors and maintains all lighting, signage, pavements, structures, etc. throughout the Airport’s landside facilities (buildings, parking, roads, etc.).
- ➔ Safety: develop a routine program that focuses on enhancing the security of the Airport and its facilities to FAA standards. This program should address the perimeter fencing and all entrance gates, the method of access, and escorting protocols.
- ➔ Enhancements: these items may fall into two categories, projects that maintain and re-life facilities, and projects that improve the function and/or capacity of facilities. Two key items to aid in promoting and marketing the Airport are the terminal facilities and the airfield. Diligent efforts should be made with the FBO and others to identify a near term solution to both enhance and expand the terminal facilities. Site constraints suggest that a new structure is required. The recently drafted ALP depicts future plans for the airside and landside areas which provide much needed growth areas for both over the next 20 years and beyond. The Airport must work with tenants to identify their specific needs, understand the justification and specific timing of each project, and

ensure that the Airport's 5-year capital program on file with the NCDOT-DOA and FAA reflect those plans. A priority should be placed on enhancing the runway and taxiway system through: runway length, dual side taxiway systems, lateral separations, and pavement widths and strengths. Additionally, initiatives should be undertaken to advance needed property acquisition, road relocations and tie-ins, utility routings and mass site grading to support aeronautical tract development and marketing.

- Costs: based on the need to maintain, enhance and possibly expand existing facilities (airside and landside), develop a life cycle cost development and tracking strategy. This strategy should identify the annualized financial resources required to maintain and promote the life expectancy of facilities. This strategy should identify the means and methods utilized to achieve the necessary resources, through increased rates and charges, pursuit of additional outside funding, third party investment, or other sources. Currently most rates charged (hangar storage, apron use, fueling, etc.) by SFS FBO are competitive with the other peer airports.

Community/Social – Ensuring that the Airport is socially responsible and has an ongoing action plan to promote the Airport in the community is vital to attracting corporate activity and tenants. All respectable corporations want to integrate into their local community to ensure harmony, a consistent ability to attract labor, and to become a “good neighbor”. This plan will manifest itself into many areas, including but not limited to the following.

- Environment: the Airport must be proactive toward ensuring that the natural environment is protected to the extent possible. Operational activity must be sensitive to noise and light emissions created at the Airport, and management must work to reduce these where operationally possible. Construction projects should work to mitigate site runoff and late night (10:00pm – 6:00am) noise. Management should also work with other City departments to promote the awareness and protection of any identified endangered or threatened species in the area. Any conflicts with wildlife should be studied and mitigated.
- Education: the Airport should establish an outreach program to local K-12 schools as well as any nearby technical schools/colleges or universities. This outreach would have two primary objectives, 1) to educate and promote an understanding and support for the Airport, and 2) to enhance the interest in the County's youth in aviation and hopeful careers in aviation. The outreach to both

local and regional (NC, SC, TN, VA, GA) colleges and universities would certainly want to include Guilford Technical Community College and Lenoir Community College

- Events: establish a regular on-going support of local learning at the Airport along with annual events. The balloon oriented event is a perfect example of this type of partnership. Consideration of a weekend airshow may be another possibility to consider, provided it does not interfere in Airport and corporate operations. Additionally the Airport may choose to sponsor local Boy Scout or Girl Scout youth programs, runway walk/run events, and even health fairs.

Business/Marketing – Orienting the future strategies of airport operations and self-promotion toward corporate aviation is the first step in achieving success in the Airport’s marketing efforts. Corporate aviation has a significant impact on both the Airport’s future and the impact on the local community. To increase chances of success, the approach must cover a number of key areas.

- Target Tenants: based on the market analysis, the Airport environment has an opportunity to focus marketing efforts on unique segments of corporate America. Companies often look to the synergies afforded by being immediately adjacent to an efficient airport for logistics reasons, whether it is to transport upper management and executives, or to ship/receive just-in-time cargo essential to their business operations. These aeronautical and non-aeronautical businesses include:
 - Small to mid-size corporate businesses (1-3 turbine aircraft)
 - Large corporate flight departments (Lowe’s, Rubbermaid, etc.)
 - Commercial charter/commuter companies and low cost airlines (long-term)
 - Aircraft manufacturing (*see Appendix*)
 - Specialty and Maintenance/Repair/ Overhaul (MRO) businesses (*see Appendix*)
 - Specialized air cargo operators (*see Appendix*)
 - Specialized automobile, trucking and watercraft parts
 - Healthcare and biomedical support
 - New technology energy research and production
 - Computer/IT systems and parts
 - Logistics warehousing
- Conferences: attend/Present/Exhibit at pre-determined conferences which are identified by airport management. The conferences should be considered to determine which will provide the greatest

exposure and to right audience. Strong consideration should be given to investing in a professional booth display. Conferences to consider include, but are not limited to:

- North Carolina Airports Association Annual Conference
 - American Association of Airport Executives Annual Conference
 - Airports Planning, Design and Construction Symposium
 - Neighboring State Airport Associations' Annual Conferences
 - National Business Aviation Association Annual Convention
 - Airports Council International – North America Annual Conference
 - MRO (Maintenance/Repair/Overhaul) Americas Annual Conference
 - Site Selectors Guild Annual Conference
- Airport Brochures/Periodic Newsletters: create a simple, full color professional brochure of no more than 8-12 pages, which increases the awareness of the Airport's facilities, operations, tenant base, and its economic contribution to the community. Additionally, dovetailing with the Community outreach program, the development of a regular newsletter, both hardcopy and internet/email based, is advised.
- Airport Website: create a stand-alone website that has more detailed information about the Airport operations, the future plans for development, minimum standards, rules and regulations, and available leasehold areas as they become available. The Airport may choose to develop its own brand and logo separate from the City
- Social Media: as a component of developing the Airport standalone website, consideration should be given to also embracing social media and creating accounts to share information on a regular basis. These accounts should consider Facebook, Twitter, and LinkedIn.
- Economic Development/Chamber of Commerce: collaborate with the City's Economic Regional Development group, the Chamber of Commerce, and the Iredell Economic Development Corporation so that prospective companies that visit the area are knowledgeable about the Airport and the property offerings available in the future. This collaboration may include a number of media venues to get shared messaging out, and also allows for leveraged marketing.
- Advertise: perception is often the single largest obstacle to overcome in the public's eye, and being proactive in developing concise, well scripted messaging to the citizens of Statesville and Iredell County can oftentimes work to the benefit of the Airport. Media is also an excellent venue to inform prospective companies of the positive trends at the Airport. The following highlights the media venues for consideration by the Airport:

- Radio
 - Newspaper
 - Billboards
 - Television (may be cost-prohibitive)
 - Trade Magazines (AOPA, Airport Business, etc.)
 - Email Newsletters
 - Back of grocery receipts/Church bulletins
- ➔ Promotions: as the Airport considers both national conference attendance and local community events, consideration should be given to developing logo paraphernalia such as balloons, pencils, pens, bags, stress balls, magnets, key chains, bottle openers, koozies, etc. Local giveaway promotions is also a theme that may be dovetailed with the media outreach under Advertising.

APPENDIX – SAMPLE TARGET AVIATION TENANT LISTS

*List Layout:***COMPANY NAME**

Headquarters Location
 Contact Name (when available)
 Email (when available)
 Phone

Maintenance, Repair and Overhaul**HAECO AMERICAS**

623 Radar Road
 Greensboro, NC 27410
 sales@haeco.aero
 (336) 668-4410

NORTH STATE AVIATION

4001 North Liberty Street
 Winston-Salem, NC 27105
 Thomas H. Chappell, V.P. Business
 Development
 tchappell@northstateaviation.com
 (336) 837 1401

DRS TECHNOLOGIES, INC

2345 Crystal Drive, Suite 1000
 Arlington, VA 22202
 (703) 416 8000

AERODYNE CORPORATION

5198 West Military Highway
 Chesapeake, VA 23321
 jr@aerodynecorporation.com
 (757) 488-2898

TRIAD AVIATION

3439 S. Aviation Drive
 Burlington, NC 27215
 Othman Rashed, President & Engine
 Consultant
 (336) 227-1467
 othman@HHTriad.com

GENESIS AVIATION

108 Landmark Drive
 Greensboro, NC 27409
 (336) 605-8000

STANDARD AERO

6710 N. Scottsdale Road, Suite 250
 Scottsdale, AZ 85253
 Amanda Mongiovi, Web/Digital
 Marketing
 Amanda.Mongiovi@StandardAero.com
 (480) 377-3193

AIRCRAFT MAINTENANCE SERVICES, INC

1400 Jim Hamilton Boulevard, Building E
 Columbia, SC 29205
 Frank Schumpert
 frank@amscolumbia.com
 (803) 708-7191

CAUSEY AVIATION

6120 Smithwood Road
 Liberty, NC 27298
 Chris Michael, Director of Maintenance
 (800) 654-4157
 shop@causeyaviation.com

SKYTECH, INC.

701 Wilson Point Road
 Baltimore, MD 21220
 Michael Myers, Director of
 Maintenance
 (888) 386-3596
 mmyers@skytechinc.com

BELLE AIRCRAFT MAINTENANCE

20 Lindbergh Lane
 Fletcher, NC 28732
 Michael Everhart, Director of
 Maintenance
 (828) 684-9191

CONTINENTAL MOTORS

2039 Broad Street
Mobile, AL 36615
(251) 438-3411

GLOBAL PARTS

901 Industrial Road
Augusta, KS 67010
Brad Vieux, VP of Business
Development & International Relations
brad@globalparts.aero
(316) 737-7126

J. R. SANDERS. JR. AVIATION SERVICES, LLC

1026 Consolidated Road
Elizabeth City, NC 27909
John Sanders, Manager
john@jhsandersaviationservicesllc.com
(252) 334-1575

ART MAINTENANCE

2305 Texas Street
Blytheville, AR 72315
Ken Wright, Senior Vice President &
General Manager
kwright@artmx.us
(870) 532-0402

Freight Forwarder

DSV AIR & SEA INC

100 Walnut Avenue, Suite 405
Clark, NJ 07066
(732) 850-8000

WORLDWIDE FLIGHT SERVICES

2100 Ponce de Leon Boulevard
Miami FL 33134
infoamerica@wfs.aero
(305) 961-1694

SERVICE BY AIR

222 Crossways Park Drive
Woodbury, NY 11797
SBA National Information & Sales
Center / Marketing
888-GO-MY-SBA
sbainfo@sbaglobal.com

BGI WORLDWIDE LOGISTICS

2453 Lewis Avenue
Signal Hill, CA 90755
lax@bgiworldwide.com
(800) 987-4244

AMERICAN CARGOSERVICE, INC

7886 Convoy Court
San Diego, CA 92111
Stacy Johnson, Business Development
Manager
sjohnson@acssan.com
(858) 565-4125

SHINE EXPRESS, INC.

154-09, 146th Avenue, 3rd Floor, Unit- I
Jamaica, NY 11434, U.S.A.
info@shine-usa.com
(718) 977-1681

BELUGA INTERNATIONAL, INC.

2301 Dorsey Road, Suite 214
Glen Burnie, MD 21061
info@gobeluga.com
(410) 969-5700

CLEARFREIGHT

880 Apollo Street, Suite 101
El Segundo, CA 90245
(310) 726-0400

EAGLE LOGISTIC SERVICE, INC

139 Centre Street, PH 104
New York, NY 10013
(212) 213-0888

LYNDEN INTERNATIONAL

18000 International Boulevard, Suite 700
Seattle, WA 98188
(800) 926-5703

PILOT FREIGHT SERVICES

314 North Middletown Road
Lima, PA 19037
(610) 891-8100

A+ FREIGHT SYSTEMS

8003 Hertfordshire Drive
Spring, TX 77391
(281) 655-9955

AMERICA'S WORLD FREIGHT, INC.

7180 Northwest 84th Avenue
Miami, FL 33166
(305) 477-4941

Air Cargo Carriers

LANDMARK AVIATION

1500 CityWest Boulevard, Suite 600
Houston, TX 77042
Steven Pendegraft, Director of Business
Development
spendegraft@landmarkaviation.com
(605) 782-7116

NATIONAL AIR CARGO, INC.

5955 T. G. Lee Boulevard, Suite 500
Orlando, FL 32822
(407) 313-2255

AIR CARGO CARRIERS, INC.

4940 S. Howell Avenue
Milwaukee, WI 53207
(414) 482-1711

FREIGHT DYNAMICS, INC.

2050 East Center Circle, Suite 100
Plymouth, MN 55441
ops@freightdynamics.com
(763) 550-9959

PLANEMASTERS, LTD.

32W611 Tower Road
West Chicago, IL 60185
(630) 513-2100

ABX AIR, INC.

145 Hunter Drive
Wilmington, OH 45177
(937) 382-5591

USA JET AIRLINES

2068 East Street
Belleville, MI 48111 USA
(734) 547-7200

FREIGHT RUNNERS EXPRESS

1901 East Layton Avenue
Milwaukee, WI 53235
Robert Sevier, Vice President / General
Manager
rsevier@freightrunners.com
(414) 744-5525

CENTUREION CARGO

4500 Northwest 36th Street
Miami, FL 33166
(305) 871-0130

FLORIDA WEST INTERNATIONAL AIRWAYS

6640 Northwest 22nd Street, Building 707,
Suite 216
Miami, FL 33122
(305) 341-9000

CSA AIR, INC.

260 Riverhills Road
Kingsford, MI 49802
webcontact@csair.com
(906) 774-3101

KALITTA CHARTERS CARGO

843 Willow Run Airport
Ypsilanti, MI 48198
Marketing@kalittacharters.com
(734) 544-3400

IFL Group, INC.

6860 South Service Drive
Waterford, MI 48327
(800) 521-4406

KEY LIME AIR

13252 East Control Tower Road
Englewood, CO 80112
(303) 768-9626

AMERIFLIGHT

1515 West 20th Street
DFW Airport, TX 75261
Peter Schiess, Director of Marketing
marketing@ameriflight.com
(818) 847-0000

AIRNET II

3041 George Page Jr. Road
Columbus, OH 43217
(614) 409-4900

AIR T, INC.

3524 Airport Road
Maiden, NC 28650
webcontact@airt.net
(828) 466-6690

SKY LEASE CARGO

243 Burgess Road
Greensboro, NC 27409
(336) 665-7149

LOGISTIC AIR

564 Wedge Lane
Fernley, NV 89408
americas-info@logisticair.com
(925) 465-0400

ARTINAIRE AVIATION, L.L.C.

4553 Glenn Curtiss Drive
Addison, TX 75001
info@martinaire.com
(972) 349-5700

CASTLE AVIATION, INC.

5430 Lauby Road, Building 12
North Canton, OH 44720
(330) 498-9333

CORPORATE AIR

1001 South 24th St West
Billings, MT 59102
caoffice@corporateair.net
(406) 247-3131

Aircraft Manufacturers

AIRBUS GROUP

4, Rue du Groupe d'Or, Auriga Building
31703 Blagnac
France

LEONARDO-FINMECCANICA

Piazza Monte Grappa N. 4
00195 Rome
Italy

BELL HELICOPTER

3255 Bell Helicopter Boulevard
Fort Worth, TX 76118
USA

THE BOEING COMPANY

100 North Riverside
Chicago, IL 60606
USA

BOMBARDIER

800 René-Lévesque Boulevard West
Montréal, QC H3B 1Y8
Canada

CIRRUS AIRCRAFT

4515 Taylor Circle
Duluth, MN 55811.
USA

DASSAULT AVIATION

78 Quai Marcel Dassault,
92210 Saint-Cloud
France

ECLIPSE AEROSPACE

Albuquerque International Sunport
2503 Clark Carr Loop Southeast
Albuquerque, NM 87106
USA

EMBRAER

Av. Brigadeiro Faria Lima, 2.170
SP 12227-901 – São José dos Campos
Brazil

FOKKER TECHNOLOGIES

Industrieweg 4
NL-3351LB, Papendrecht
Netherlands

GULFSTREAM AEROSPACE

500 Gulfstream Road
Savannah, GA 31408
USA

LOCKHEED MARTIN CORPORATION

6801 Rockledge Drive
Bethesda, MD 20817
USA

MD HELICOPTERS INCORPORATION

4555 E McDowell Road
Mesa, AZ 85215
USA

MOONEY INTERNATIONAL CORPORATION

165 Al Mooney Road
Kerrville, TX 78028
USA

NORTHROP GRUMMAN

2980 Fairview Park Drive
Falls Church, VA 22042
USA

PIAGGIO AEROSPACE

Viale Generale Disegna, 1
17038 Villanova d'Albenga SV
Italy

PILATUS AIRCRAFT, LTD.

P.O. Box 992
6371 Stans
Switzerland

PIPER AIRCRAFT, INC.

2926 Piper Drive
Vero Beach, FL 32960
USA

ROBINSON HELICOPTER COMPANY

2901 Airport Drive
Torrance, CA 90505
USA

SIKORSKY AIRCRAFT

124 Quarry Road
Trumbull, CT 06611
USA

TEXTRON AVIATION

1 Cessna Boulevard
Wichita, KS 67215
USA