



2016 – 2017

# **Economic Impact Study**

Executive Summary

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# Message from the Mayor



## Greetings,

I am pleased to share the 2017 Economic Impact Study, a comprehensive report of Hartsfield–Jackson Atlanta International Airport’s financial impact on Metro Atlanta, the State of Georgia and the Piedmont Atlantic Megaregion.

Consistently ranked as the world’s busiest passenger airport, Hartsfield–Jackson positively impacts the entire southeastern United States, both as a critical cargo hub for North America and as a preferred destination for international business and tourism. Thanks to Hartsfield–Jackson’s connectivity, Atlanta is a gateway to the world.

In Fiscal Year 2017, Hartsfield–Jackson generated approximately 383,000 jobs and nearly \$51.5 billion for the Metro Atlanta region, maintaining its position as one of our city and state’s most valuable assets.

As we continue making investments to raise Atlanta’s global profile, while creating long-term economic and business growth, we must continue to build on our vision of One Atlanta – an equitable, diverse and resilient city where everyone has equal access to opportunity and a fair chance to realize their potential.

I applaud Hartsfield–Jackson Atlanta International Airport’s leadership and partners for their strategic efforts in leading our airport into the future.

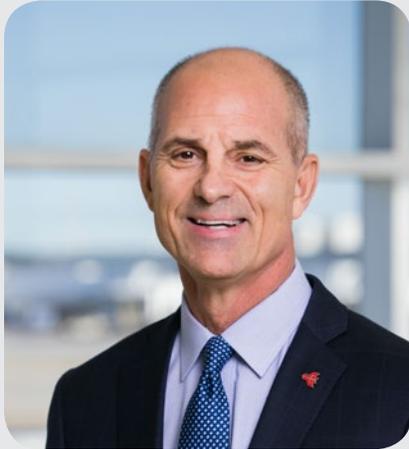
Sincerely,

A handwritten signature in red ink that reads "Keisha Bottoms". The signature is fluid and cursive, written in a professional style.

Keisha Lance Bottoms

60th Mayor of Atlanta

# Message from the General Manager



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## Dear Airport stakeholders:

With a reputation for being the transportation gateway of the southeast to the world, it is easy to overlook the significant contribution made by the world's busiest and most efficient airport. Hartsfield–Jackson Atlanta International Airport's (ATL) overarching purpose is to drive the economic development in metropolitan Atlanta, the state of Georgia and across the Southeast.

In fact, in our most recent economic impact study, ATL continues to serve as the prime economic engine for the entire Southeast region. The Airport is a jobs center of more than 63,000 positions in airlines and airport support functions. As such, it accounts for one in every five jobs (20 percent) in the regional economy.

The Department of Aviation considers Hartsfield–Jackson's role as an economic generator to be its highest calling

Our priorities and business model have been set to reflect the goal of preserving and expanding ATL's impact on the region's economy well into the future.

One of the ways we strengthen our ability to create jobs and stimulate the economy is by continuing to grow air cargo operations. Another is through ATLNext, our multibillion-dollar capital improvement program that will modernize our facilities and accommodate growth that will allow us to compete with other markets in the future. This transformative series of projects will offer a wealth of jobs and business opportunities over the next 20 years.

On behalf of the entire team at Hartsfield–Jackson Atlanta International Airport, I'd like to thank the community and business partners who contributed to completing this comprehensive study. We will continue to work together for a more prosperous future.

Sincerely,  
  
John Selden  
Airport General Manager

# Routes Across the World

**ATL connects Atlanta and the southeastern U.S. to the world.**

Hartsfield–Jackson Atlanta International Airport (ATL) provides nonstop service to more than 150 U.S. domestic airports and 75 international airports in more than 50 countries.



## Domestic

### States

Alabama	Massachusetts	South Carolina
Alaska	Michigan	South Dakota
Arizona	Minnesota	Tennessee
Arkansas	Mississippi	Texas
California	Missouri	Utah
Colorado	Montana	Vermont
Connecticut	Nebraska	Virginia
Delaware	Nevada	Washington
Florida	New Hampshire	West Virginia
Georgia	New Jersey	Wisconsin
Hawaii	New Mexico	Wyoming
Idaho	New York	
Illinois	North Carolina	<b>Territories</b>
Indiana	North Dakota	District of Columbia
Iowa	Ohio	Puerto Rico
Kansas	Oklahoma	U.S. Virgin Islands
Kentucky	Oregon	
Louisiana	Pennsylvania	
Maine	Rhode Island	
Maryland		

## International

### North America

Vancouver  
Calgary  
Toronto  
Ottawa  
Montreal

### Central America

San José del Cabo  
Puerto Vallarta  
Guanajuato  
Guadalajara  
Monterrey  
Mexico City  
Guatemala City  
San Salvador  
Managua  
Liberia  
San Jose  
Panama  
Tegucigalpa  
San Pedro Sula  
Roatán

Belize  
Montego Bay  
Cozumel  
Cancun  
Grand Cayman  
Port-au-Prince  
Kingston  
Santiago  
Santo Domingo  
Punta Cana  
Providenciales  
George Town  
Nassau  
North Eleuthera  
Marsh Harbour  
Freeport  
Bermuda  
St. Maarten  
St. Kitts  
Antigua  
St. Lucia

Barbados  
Grenada  
Bonaire  
Aruba

### South America

Cartagena  
Caracas  
Medellín  
Bogotá  
Quito  
Lima  
Santiago  
Buenos Aires  
São Paulo  
Rio de Janeiro  
Brasília

### Europe

Dublin  
Manchester  
London

Amsterdam  
Brussels  
Düsseldorf  
Stuttgart  
Frankfurt  
Munich  
Paris  
Madrid  
Barcelona  
Rome  
Venice  
Milan  
Zurich

### Africa

Lagos  
Johannesburg  
Dubai

### Asia

Seoul  
Tokyo

With a geographic location that facilitates nonstop flights to most major cities worldwide, access to multimodal infrastructure well-equipped to manage heavy volumes of cargo, and ongoing capital investment dedicated to sustainable expansion programs, we are counting on ATL as a facilitator of our future growth, and the growth and success of the city itself.

**Jon Slingerup**, Chairman and CEO, American Global Logistics

# Introduction & Study Approach

## INTRODUCTION

Hartsfield–Jackson Atlanta International Airport (ATL or the Airport) is the world’s busiest passenger airport, serving more than 103 million passengers annually. ATL is an engine for economic development across the southeastern United States. ATL triggers catalytic economic effects by:

- Operating as a job center of more than 63,000 jobs;
- Enabling business and travel tourism, enhancing the regional economy and hospitality industries;
- Serving as a freight gateway, supporting reliant goods producing industries throughout the Southeast; and
- Driving additional economic activity through supply chain effects and the spending of worker wages.

The Airport’s influence is centered in Atlanta and Fulton County, but extends throughout Georgia and across neighboring states of Alabama, Florida, North Carolina, South Carolina and Tennessee. This study examines the fiscal year 2017 economic impact of ATL on three geographies:

- **Metropolitan Atlanta**, defined as the 28-county Atlanta-Sandy Springs-Marietta Metropolitan Statistical Area (MSA)
- The **State of Georgia**, and
- The 355-county **Piedmont Atlantic Megaregion (PAM)**, which covers all or portions of six states.

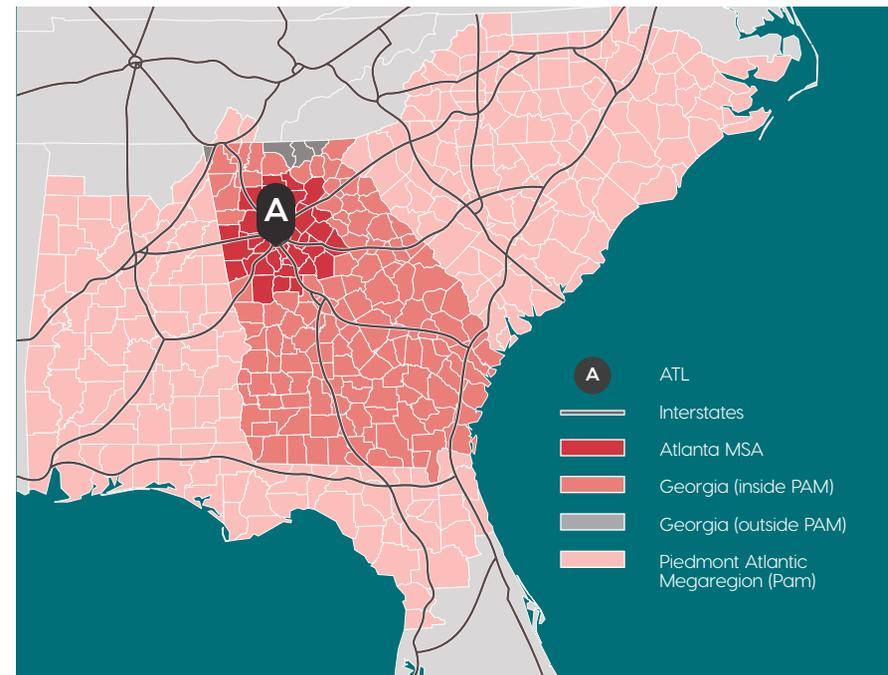


Hartsfield–Jackson Atlanta International Airport is one of the most critical assets Atlanta and the Southeast have to facilitate global trade and investment while vastly growing jobs, income and corporate growth in our region.



Dr. Diane Alleva Cáceres, President, World Trade Center Atlanta

The study also covers freight shipped through ATL from each state in the megaregion to domestic and international markets, extending the economic influence of businesses in these states across the nation and the globe.



In FY 2017, ATL generated **\$82.4 billion in revenue** in the Piedmont Atlantic Megaregion, supporting upwards of **448,000 jobs**. This includes nearly 313,000 jobs in the Atlanta MSA.

# Flow of Economic Impacts



The ability of our associates to go virtually anywhere, anytime, nonstop, and the ease with which our global visitors can reach us, have dramatically increased the efficiency of our business. When we decided to build a new headquarters, integrated with a Porsche Experience Center, our proximity to the Airport became even more important.

Our proximity to Hartsfield–Jackson allows many of our guests to fly to Atlanta in the morning, spend a wonderful day with us, and fly home the same evening. It is no exaggeration to say that ATL is one of the keys to our success.



Joseph S. Folz, Vice President, General Counsel and Secretary, Porsche Cars North America



## Direct Impacts

### Direct Sales

Company is paid to operate cargo freighter from ATL.

### Direct Jobs & Wages

Air cargo company pays Airport workers.

## Indirect Impacts

### Indirect Sales

Air cargo operator pays local companies for maintenance of aircraft.

### Indirect Jobs & Wages

Local aircraft maintenance companies employ workers to service air cargo operator's aircraft.

## Induced Impacts

### Induced Sales

Workers buy groceries.

### Induced Jobs & Wages

Grocery stores employ workers.

# Summary of Impacts

The total economic contribution of ATL to the Piedmont Atlanta Megaregion is the sum of the business activity directly associated with ATL's operations and the spending of its users, as well as the additional business activity associated with orders to suppliers and re-spending of worker income.

In FY 2017, there were more than 63,000 direct jobs at ATL. Off-site business activities that depend directly on local air service for cargo deliveries or visitor spending by air passengers raised the direct airport impact to over 219,000 jobs in the PAM and produced \$46.9 billion in business sales.

Spin-off activities in the region (indirect and induced multiplier effects) are associated with goods and services purchased by the directly affected businesses and the re-spending of worker income in the region. Including these indirect and induced effects, the total economic role of ATL increases to approximately \$82.4 billion in business sales, including \$19.8 billion in personal income, and supports more than 448,000 jobs in the Southeast.

Economic Impacts	Jobs	Income (\$M)	Revenue (\$M)
<b>I. DIRECT IMPACT: AIRPORT-DRIVEN ACTIVITY</b>			
Airport-Based	63,359	\$4,531	\$17,049
Visitor Spending	122,733	\$3,000	\$11,047
Reliant Airport Users (Freight)	33,109	\$2,501	\$18,846
<b>Subtotal</b>	219,201	\$10,033	\$46,942
<b>II. INDIRECT IMPACT: SUPPLIERS OF GOODS AND SERVICES</b>			
Airport-Based	44,111	\$2,129	\$6,803
Visitor Spending	28,457	\$1,256	\$4,327
Reliant Airport Users (Freight)	33,264	\$1,769	\$6,916
<b>Subtotal</b>	105,831	\$5,153	\$18,046
<b>III. INDUCED IMPACT: SPENDING OF WORKER INCOME</b>			
Airport-Based	52,106	\$2,031	\$7,416
Visitor Spending	33,757	\$1,293	\$4,779
Reliant Airport Users (Freight)	37,247	\$1,316	\$5,219
<b>Subtotal</b>	123,110	\$4,641	\$17,414
<b>TOTAL REGIONAL IMPACT</b>	<b>448,142</b>	<b>\$19,827</b>	<b>\$82,403</b>

Hartsfield–Jackson’s ability to function as a job center and cargo hub has allowed us to recruit companies from several industries and promote the Airport area now known as the Aerotropolis.

Shannon James, President and CEO, Aerotropolis Atlanta Alliance

# Total Economic Impact by Geography

The economic impact of the Airport ripples out through the economies of the Atlanta MSA, rest of Georgia, and the rest of the PAM Region.



Georgia's logistics infrastructure is one of the state's greatest economic development assets and plays a critical role in creating jobs and investment opportunities in Georgia. Without question, Hartsfield-Jackson Atlanta International Airport's direct air access bolsters the state's business, tourism, trade and investment opportunities here and around the world.



Pat Wilson, Commissioner, Georgia Department of Economic Development

**\$51.6 B in revenue**

**Atlanta MSA**

Direct effects (Airport-based, visitor spending and freight) + indirect and induced effects

**\$15.2 B in revenue**

**Rest of Georgia**

Additional direct effects (visitor spending and freight) + indirect and induced effects

**\$15.7 B in revenue**

**Rest of PAM**

Still more direct (freight) effects + indirect and induced effects, as dollars remain circulating in PAM region



**\$82.4 B\* in revenue**



**across the entire Piedmont Atlantic Megaregion (PAM).** \* Total may not add due to rounding.

ATL as a job center supports jobs with above-average wages, compared to the Atlanta MSA and Georgia as a whole.

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Hartsfield–Jackson Atlanta International Airport is one of the city’s greatest resources, not only for travel, but also for companies establishing their headquarters here. Our city is fortunate to be home to the world’s busiest airport, reaffirming Atlanta as an international hub.

We are a regional tourism organization and Hartsfield–Jackson is critical to our continued success in hosting meetings and events within the southeastern United States and encouraging travel to our member states.

Monica Smith, President and CEO,  
Southeast Tourism Society

## Average Income Per Job

**ATL**

(Direct Airport-Based Jobs)

**\$71,500**

**Atlanta MSA**

**\$50,300**

**Georgia**

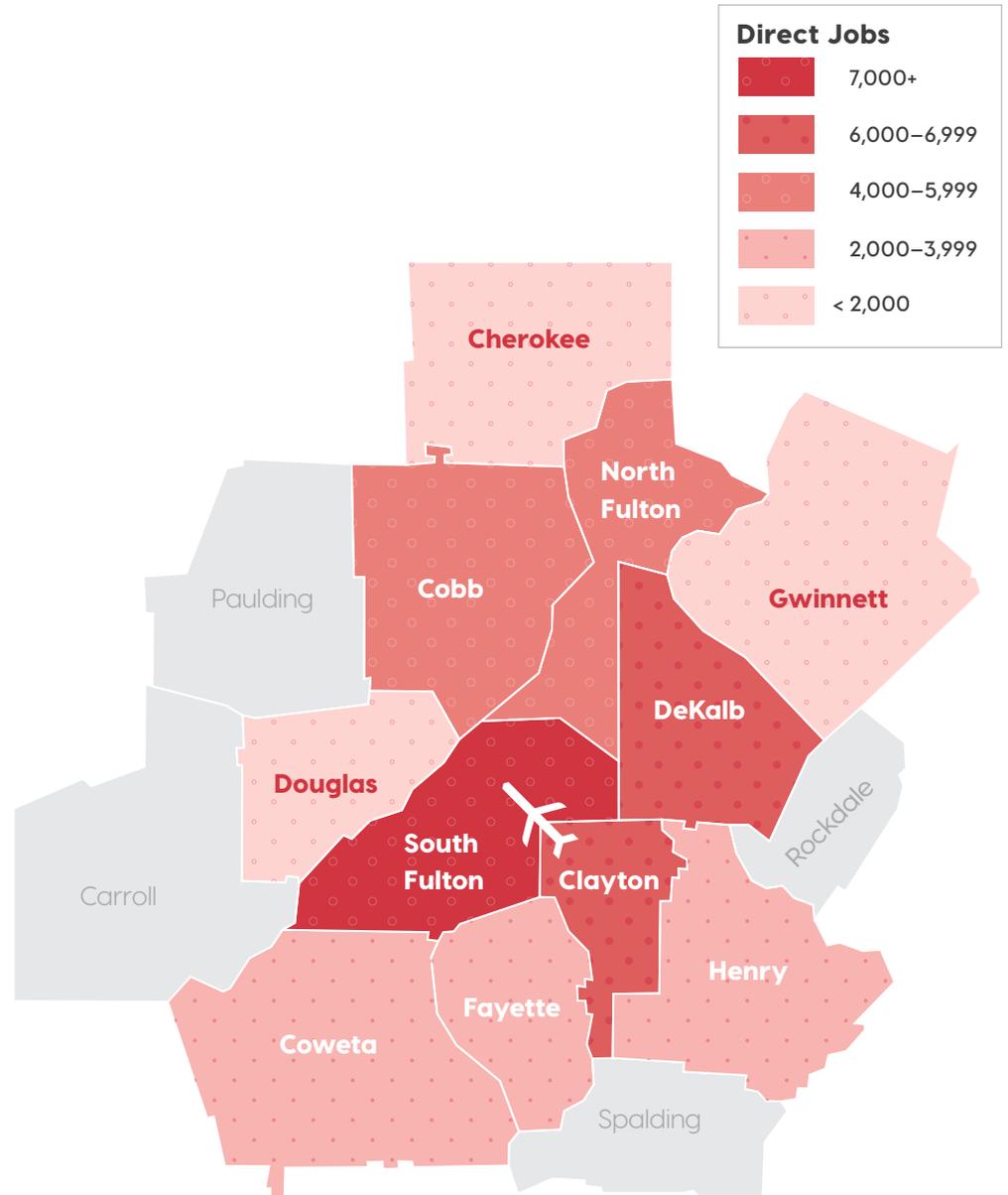
**\$45,000**



# Airport Employment by County

County	On-Airport Employees	Percent of Direct Jobs
South Fulton*	18,245	28.8%
DeKalb	6,906	10.9%
Clayton	6,193	9.77%
North Fulton*	4,419	6.97%
Cobb	4,051	6.39%
Henry	3,799	6%
Fayette	3,299	5.21%
Coweta	2,424	3.83%
Gwinnett	1,733	2.74%
Douglas	1,181	1.86%
Cherokee	514	0.81%
Rest of MSA	2,663	4.2%
Rest of Georgia	977	1.54%
Rest of U.S.	6,956	10.98%
<b>Total</b>	<b>63,359</b>	<b>100%</b>

\*For the purposes of this study, Fulton County was divided at Interstate 20 into two subareas and are indicated as North and South Fulton County. This analysis is consistent with previous years methodology.



# ATL as a Freight Gateway

## Air Cargo Shipped Through ATL

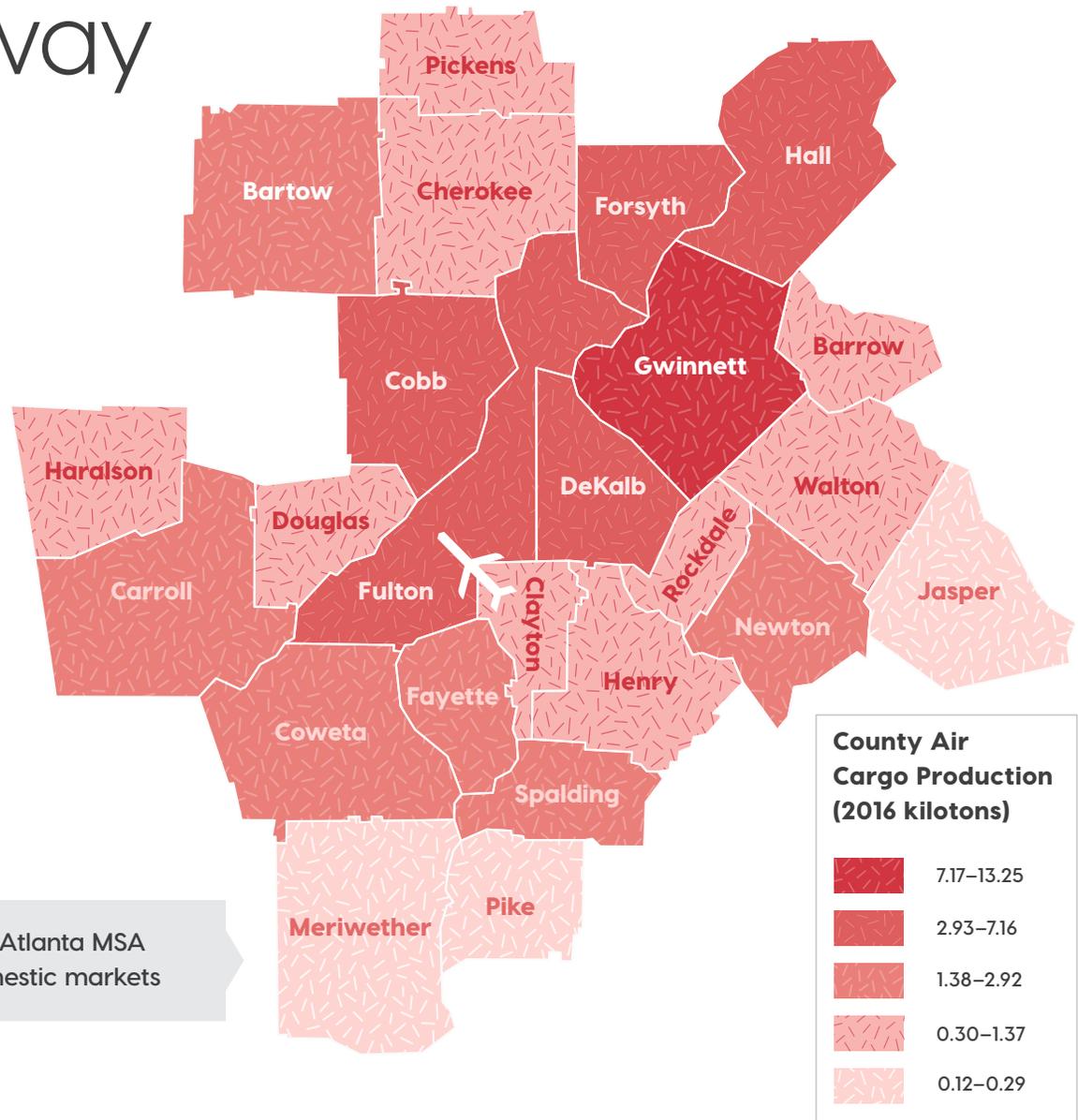
In 2017, ATL was the 14th busiest airport in the United States in terms of air cargo tonnage landed, and overall freight volumes at ATL have increased 37 percent since 2012.

ATL supports economic development by connecting the metropolitan Atlanta, Georgia and southeastern states' economies with national and international markets.

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Source Geography	Value of Goods (\$B)
Atlanta MSA	4.5
State of GA	11.9
PAM Region	18.8

Tons of air cargo produced by county in the Atlanta MSA and shipped through ATL to foreign and domestic markets



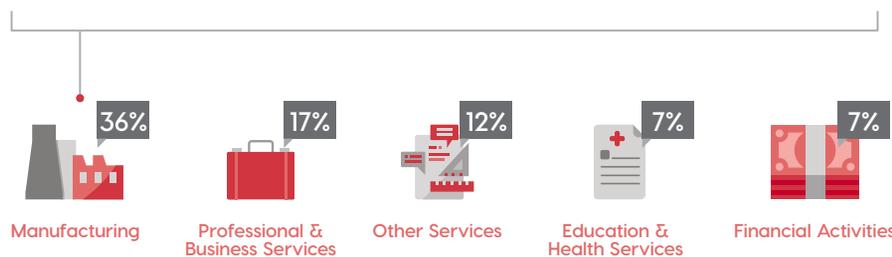
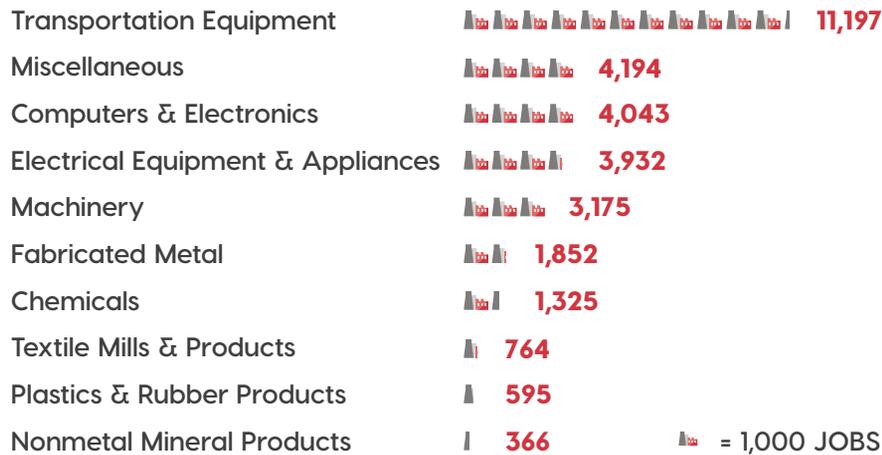
# Jobs Supported by Air Cargo at ATL

Air cargo touches all parts of the economy in the Piedmont Atlantic Megaregion.

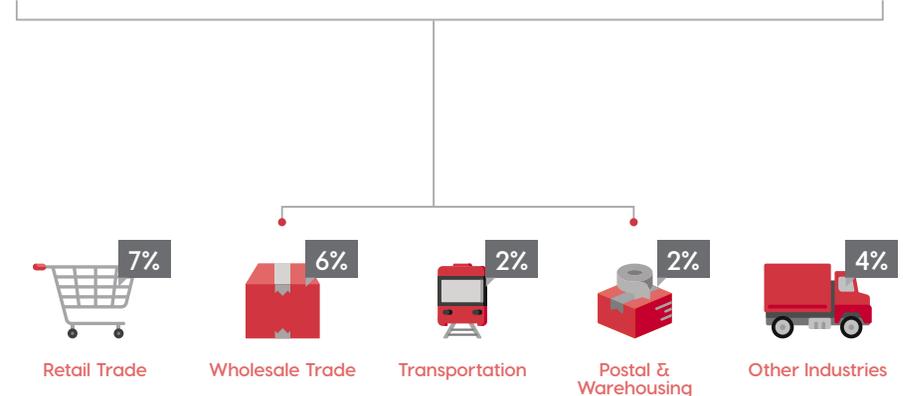
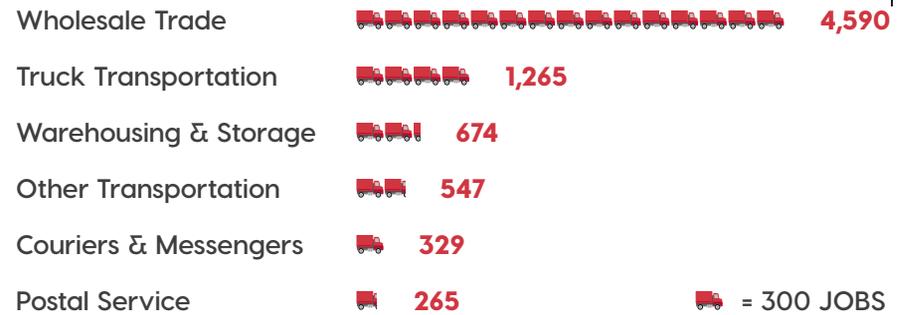
// Hartsfield–Jackson’s lofty position as the busiest and most efficient airport in the world is one of the primary reasons why Atlanta is known as #SupplyChainCity. //

Ben Harris, Director, Supply Chain & Advanced Manufacturing, Metro Atlanta Chamber

## Manufacturing Jobs Directly Supported



## Logistics Jobs Indirectly Supported



# 103,600 Total Jobs Supported by Air Cargo

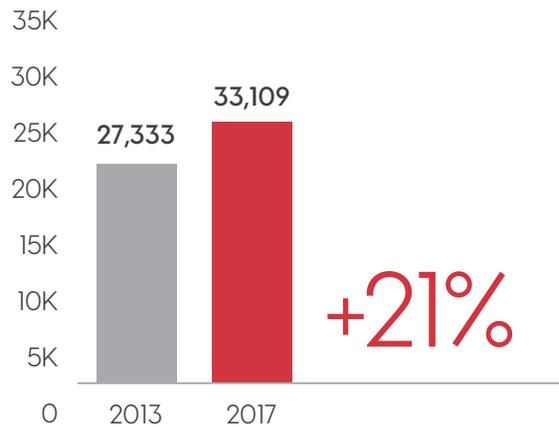
\*Transportation equipment includes motor vehicle, aerospace and other transportation vehicle equipment and parts.

\*\*Miscellaneous manufacturing includes medical equipment and other miscellaneous high-value low weight goods transported by air.

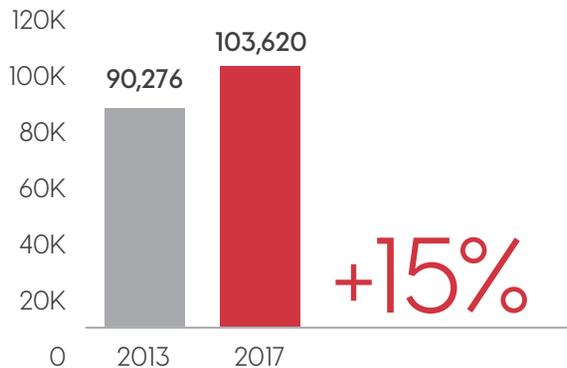
# Air Cargo Trends Over Time

Air cargo movements through ATL play an increasing role in the economic development of the Southeast.

## Direct Jobs



## Total Jobs

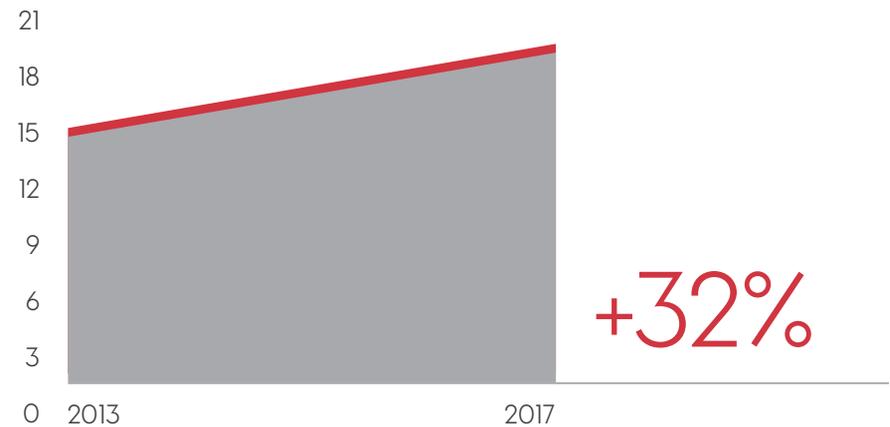


Trends in direct and total jobs and revenue supported by air cargo in the PAM

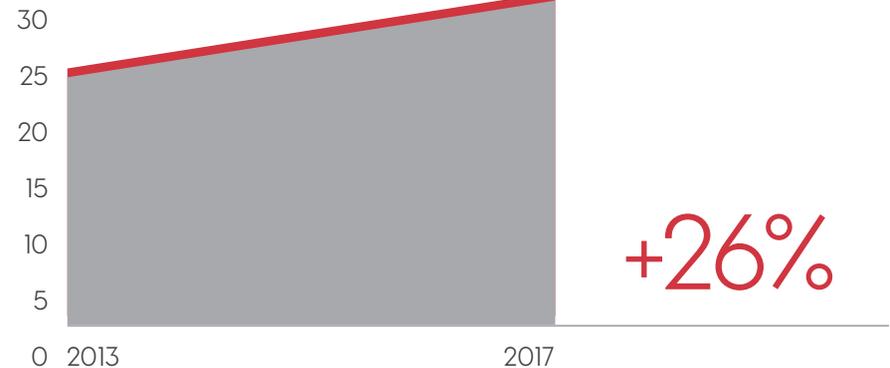
Hartsfield–Jackson Atlanta International Airport serves as both a hub for cargo and an economic engine for the Southeast, as much of our success in global commerce is directly tied to the airport's operations. We have been able to document that new direct routes to new countries and cities lead to more travelers and increased business investment from those markets.

Nathan Deal, Former Governor of Georgia

## Direct Revenue (\$B)



## Total Revenue (\$B)





# Atlanta City Council

**Felicia A. Moore**  
Council President

**Carla Smith**  
District 1

**Amir R. Farokhi**  
District 2

**Cleta Winslow**  
District 4

**Natalyn Mosby  
Archibong**  
District 5

**Jennifer N. Ide**  
District 6

**Howard Shook**  
District 7

**Dustin R. Hillis**  
District 9

**J.P. Matzigkeit**  
District 8

**Andrea L. Boone**  
District 10

**Marcia Collier  
Overstreet**  
District 11

**Joyce M. Sheperd**  
District 12

**Michael Julian Bond**  
Post 1

**Matt Westmoreland**  
Post 2

**Andre Dickens**  
Post 3



**Keisha Lance Bottoms**  
60th Mayor of Atlanta



**John Selden**  
Airport General Manager

Department of Aviation  
P.O. Box 20509  
Atlanta, Georgia 30320

For additional information,  
contact the Office of Public  
Affairs at (404) 382-2389.



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[www.atl.com](http://www.atl.com)

Issue Date: **March 2019**