



ECONOMIC IMPACT OF KING COUNTY INTERNATIONAL AIRPORT IN 2024

King County Office of Economic and Financial Analysis
(OEFA)

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Executive Summary

King County International Airport ('KCIA') is critical to the local economy - testing planes and moving people and products across the Pacific Northwest.

In addition to the critical role that airports play in the U.S. transportation network, they also provide economic engines on their own, supporting well-paying jobs and generating economic output that benefits the local, regional, and state economy. King County International Airport serves small commercial passenger airlines, cargo carriers, private pilots, corporate jets, helicopters, and military aircraft. The residents and businesses that benefit from the airport include business and leisure travelers as well as corporate firms such as Boeing, United Parcel Service (UPS) and others that require and use the airport for business operations. It's also the training grounds for the Boeing Company planes, operations and the Museum of Flight.

The King County Office of Economic and Financial Analysis (OEFA) was requested to conduct a high-level economic impact study on the airport's effects on the local economy in King County. This economic impact study quantifies the economic benefits from the King County International airport and its tenants in 2024. These impacts are measured in terms of employment, payroll, and economic output associated with on-airport activities and the spending of visitors that arrive by airline. The study relies on inputs from individual airport data for use in an economic model accepted by the Federal Aviation Administration (FAA) and other government agencies for use in quantifying economic impacts.

The research results are compared to other past economic impact studies for KCIA and to other studies that included all airports in Washington. The following results were found for King County International Airport:

- > Support 14,769 jobs.**

- > Provide \$2.1 billion in annual payroll.**

- > Produce \$4.3 billion of annual value added.**

- > Generate \$660.3 million of federal, state and local taxes**

These jobs are tied to the on-airport activity, such as airport operations and administration, ground handling operations, ticket agents, terminal services, and airport tenant activities. The jobs related to spending by visitors using airlines are found in the hospitality industry, such as hotel and restaurant jobs. Jobs connected to capital improvement projects (CIP) at the airport include engineers, architects, consultants, and construction workers. These study results highlight the economic importance of this airport and how it contributes to the economy.



Background Statistics - KCIA Economic Impact

This report highlights the last 10 years' trends in key KCIA statistics which impact King County's local economy.

KCIA Enplanement Trends

The methods used in this study mirror those used in previous studies for KCIA. The last economic impact study used the base year of 2020 and analyzed the commercial service at KCIA that existed during the pandemic. Before providing the detailed economic impact, results and comparing them to the previous study, it is useful to examine the performance in the past 10 years of the King County Boeing field airport to frame its performance economically in 2024. The first set of datasets on enplanements, freight and mail volumes are all from the Bureau of Transportation Statistics for the King County International Airport.

A look at the past 10 years (Figure 1 on the following page) shows that, except for the COVID-19 pandemic in 2020, the passenger volume at KCIA was rising significantly prior to the pandemic. Then post pandemic the KCIA passenger volume starts to grow again but the monthly volume has not reached the maximum of 4,500 seen in August 2019. In 2024, total passengers were 218,313 which was below 2023 by 1.8%. During the first 6 months of 2025, passenger volume was above the first half of 2024 by 2%. Of the total passengers at KCIA in the first 6 months of 2025, nearly 9% were international passengers with flights to Canada. Even though passenger volume at KCIA has been growing, freight volumes have been declining since 2015, see Figure 2. In 2015, freight volume was high at 123.6 million pounds. By 2024, the freight volume was 70.9 million pounds, which was below 2023 by 6.8% and below the 2015 high by 42.6%. In the first 6 months of 2025, freight volume was up by 5.6% from the first half of 2024. 99% of KCIA's freight volume is from UPS flights in the first 6 months of 2025.

Figure 1

KCIA Monthly Enplanement Counts 2015-2025

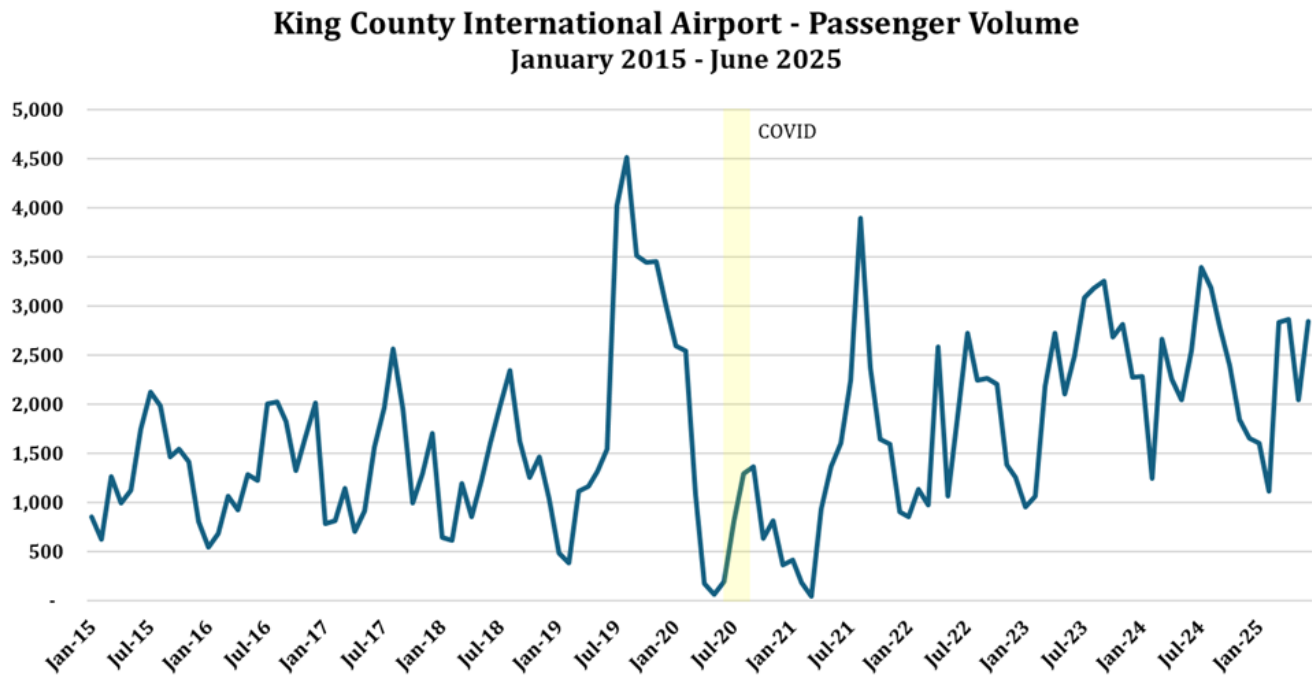
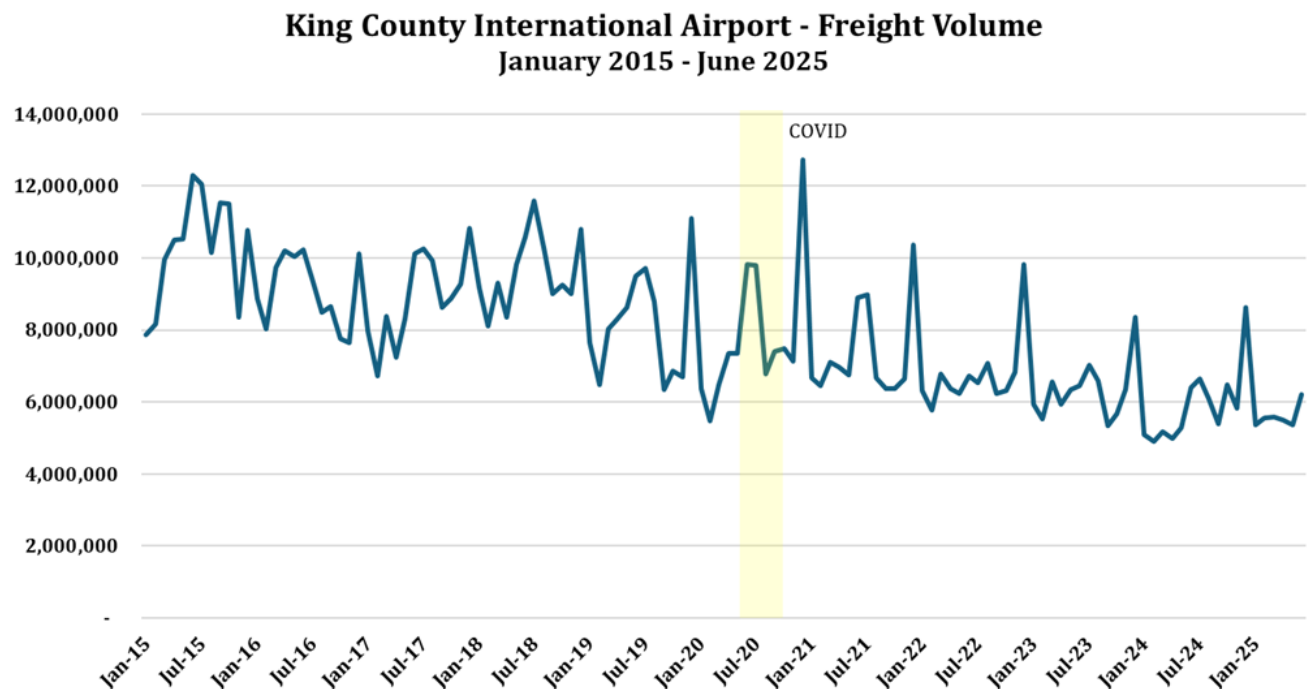


Figure 2

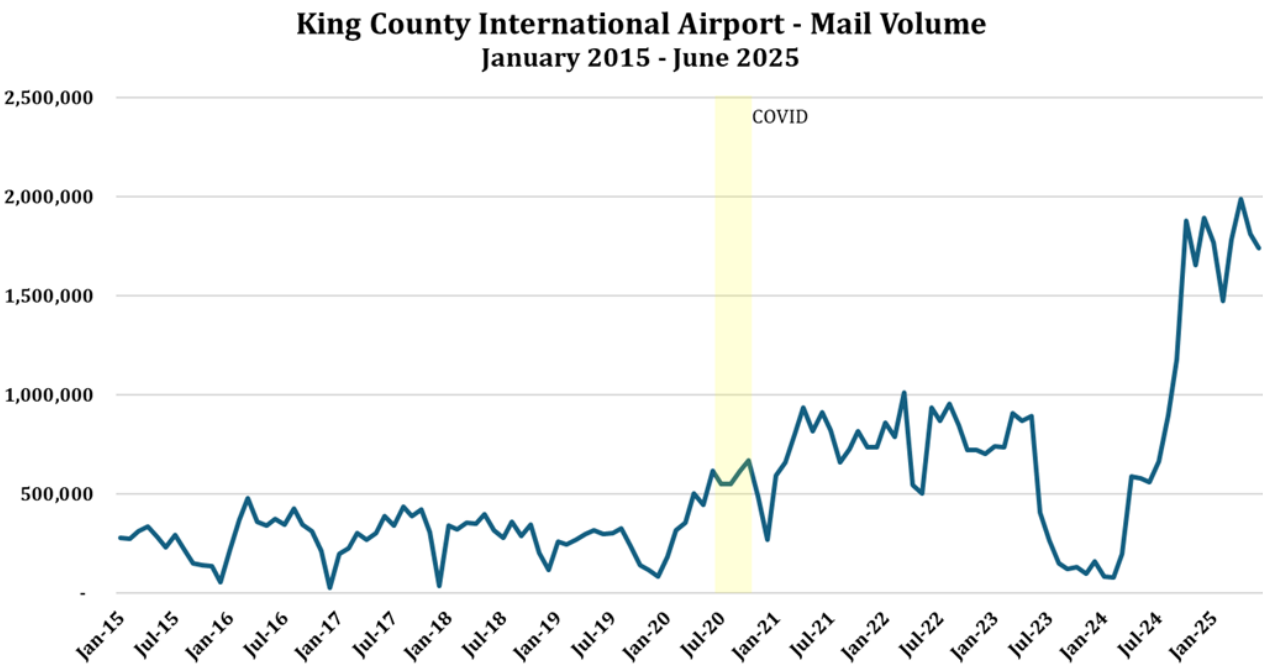
KCIA Monthly Freight Volume (lbs.) 2015-2025



Mail volume at KCIA has grown significantly in 2024 (Figure 3) compared to the prior year and 10 years ago. In 2024, the mail volume hit 14,772,314 lbs, which was above the prior year by 109%. In the first 6 months of 2025, the mail volume was higher than the first half of 2024 by 405%.

Figure 3

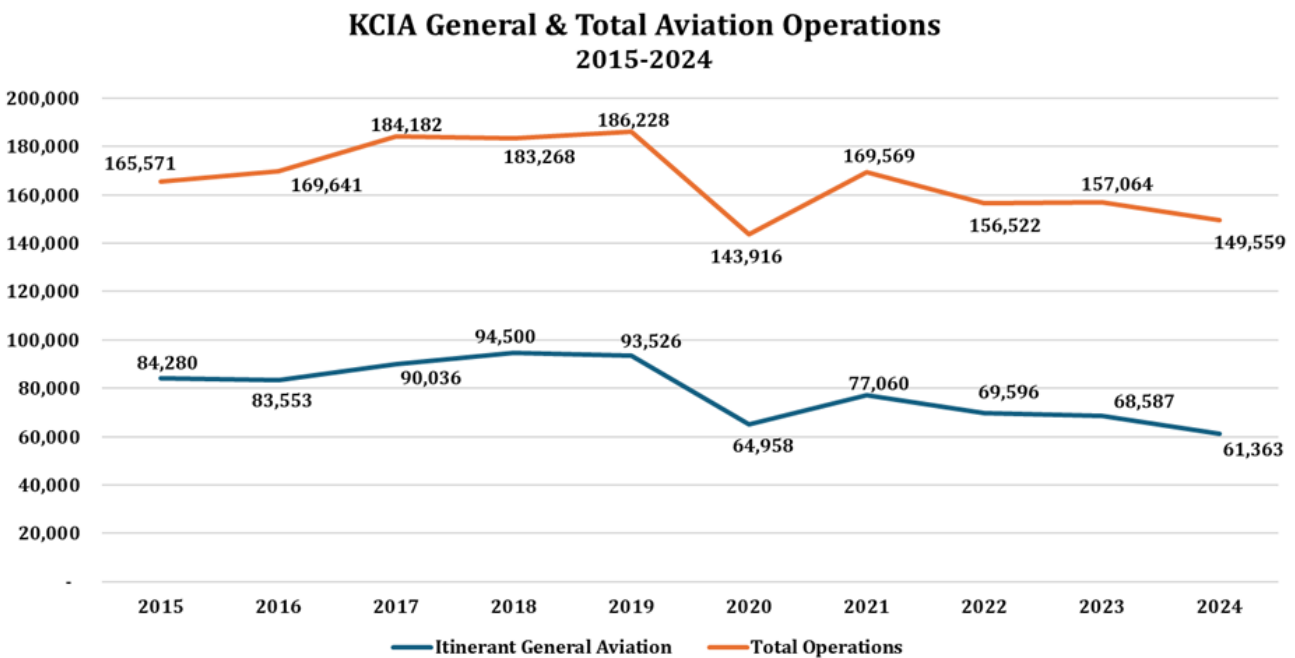
KCIA Monthly Mail Volume (lbs.) 2015-2025



KCIA Operations Trends

Figure 4

KCIA General and Total Operations Trends 2015-2025



The operations data visualized in Figure 4 is from the FAA Operations Network (OPSNET) database. King County’s airport operations consist of the number of arrivals and departures, and there are two types of operations: local and itinerant.

- 1) Local operations are those operations performed by aircraft that remain in the local traffic pattern or low passes at the airport, as well as the operations to and from the airport.
- 2) Itinerant operations are operations performed by an aircraft that lands at the airport, arrives from outside the airport area, or departs the airport and leaves the airport area.

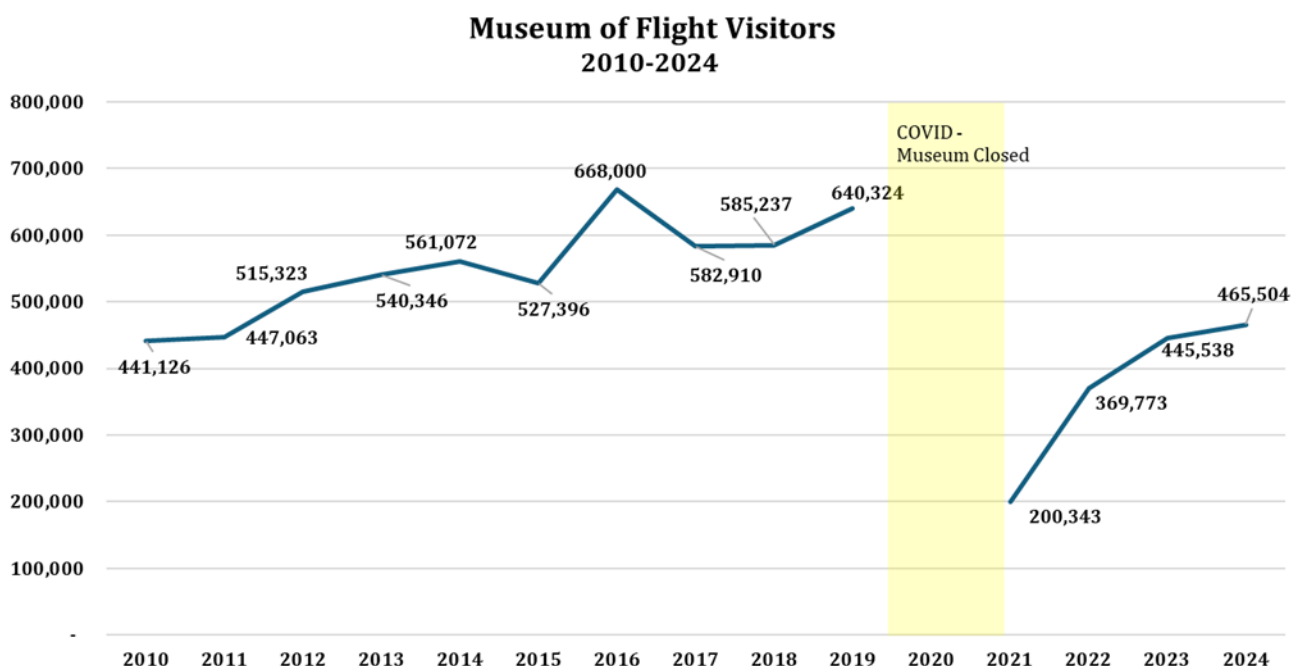
The trends in itinerant and total operations for KCIA have been similar in the last 10 years, with sizeable impacts from the 2020 COVID-19 pandemic and a subsequent rebound in 2021, but since then the trend for both itinerant and total operations have been slightly declining. In 2024, there were 149,559 total arrivals and departures, of which 61,363, or 41%, were itinerant flights. 2024 total operations represented a 4.8% decline from 2023 total operations.

Museum of Flight Visitor Trends

One of the prominent tenants at the King County International Airport is the Museum of Flight. Each year, the museum attracts thousands of visitors. Before the pandemic, the number of museum visitors hit 640,324 people in 2019. Since the full closure during the pandemic, the number of visitors to the museum has been growing again, with 465,504 visitors in 2024, but is still 27% below the pre-pandemic level of 2019.

Figure 5

Museum of Flight Visitors 2010-2024



Aerospace Employment and Taxable Sales Trends

The aerospace employment and average wages of King County International Airport tenants and administration were quantified based on merging Washington Employment Security Department data with the King County companies listed as tenants of the airport, as well as the administration and operations of the airport. The merging of the data resulted in identifying employment and taxable sales for 27 and 30 companies respectively who were tenants at KCIA. The following two tables compare the employment and quarterly average wages for those tenant companies in 2019 versus five years later in 2024.

Table 1

Employment Changes between 2019 and 2024 for certain industry sectors in the KCIA area

Industry Sector	2019	2024	Percent Change
31-33 Manufacturing	10,070	10,051	-0.2%
48-49 Transportation and Warehousing	497	815	63.9%
56 Administrative and Support	4	12	220.0%
61 Educational Services	58	72	23.6%
71 Arts, Entertainment, and Recreation	223	191	-14.3%
92 Public Administration	31	51	63.2%
Total Estimate in KCIA area	10,883	11,192	2.8%

Source: Washington Employment Security Department and OEFA

Table 2

Average Quarterly Wage Changes between 2019 and 2024 for certain industry sectors in the KCIA area

Industry Sector	2019	2024	Percent Change
31-33 Manufacturing	\$395,324,065	\$506,792,230	28.2%
48-49 Transportation and Warehousing	4,224,225	12,483,362	195.5%
56 Administrative and Support	32,674	211,419	547.1%
61 Educational Services	392,675	541,306	37.9%
71 Arts, Entertainment, and Recreation	2,696,893	3,368,857	24.9%
92 Public Administration	734,462	770,317	4.9%
Total Estimate in KCIA area	\$403,404,993	\$524,167,491	29.9%

Source: Washington Employment Security Department and OEFA

The results from Table 1 show that employment for airport administration and operations and tenants have grown a little, at 2.8% over five years since 2019. Certain sectors have declined in employment; manufacturing employment declined 0.2% and arts and entertainment employment declined 14% over the five year period. All other sectors grew, such as administration and support, as well as transportation and warehousing. While airport employment and tenants grew slightly over the five-year period, the average quarterly wages for these industry sectors grew substantially. All industry sectors combined saw an average wage increase of 30%. Certain industry sectors like transportation and warehousing and administrative and support each grew by 195% and 547%, respectively, over the past five years. The average wages of the manufacturing sector grew 28% while manufacturing employment fell slightly.

Methodology

This report quantifies the economic impact of KCIA and tenant activities of small commercial air services in terms of employment, payroll, and economic output.

This study was conducted like previous King County and national airport economic impact studies with a few differences. This 2025 study used calendar year 2024 as the base year. The objective of this analysis was to determine the changes in the aviation impact for King County International Airport ('KCIA'), post pandemic. This analysis also evaluated the airport's capital improvement program for the next six years.

To determine the economic impact, OEFA used the 2024 IMPLAN model for King County as the Washington State online Aviation Economic Impact Calculator was no longer available to local airports to utilize in economic impact studies. IMPLAN is a widely used input-output calculator in the United States, with data derived from several reputable federal sources such as the Bureau of Economic Analysis (BEA), Bureau of Labor Statistics (BLS), US Census, and US Department of Commerce. The economic model has current economic statistics such as jobs, payroll, output, and business revenue, and it covers 546 unique industry classifications which align with the North American Industry Classification System (NAICS),

In this 2025 economic impact study, an airport tenant survey was not conducted like in past studies due to time and resource constraints. Instead, the list of King County airport tenants was compared to Washington Employment Security Department (ESD) employment data and Washington Department of Revenue (DOR) taxable sales for businesses to identify KCIA's direct employment. This employment information found for 27 companies reported as tenants of the airport and was used to run the IMPLAN model to estimate the amount of on-airport direct economic impact for KCIA. Jobs are the total number of people employed or supported that are associated with business revenues and payroll.

Payroll is the total compensation for employment, which includes salaries, wages, and additional benefits. Payroll is a component of value added and is also known as “labor income.” Value added quantifies the economic productivity of KCIA. It is calculated by subtracting the costs of goods and services purchased from other businesses from the revenues earned by the subject business or industry. Value added represents a company’s or industry’s contribution to the gross county product, which is like the gross state product or gross domestic product on the national level.

There were three main categories of impacts:

On Airport: These consist of airport administration, which includes airport managers and staff necessary for airport operations. It also includes business operations, grounds maintenance, building upkeep, and contractors from the airport. It includes airport business tenants that are located inside the terminal building or elsewhere in the airport.

Visitor Spending: Visitors are estimated based on the number of flights and passengers coming into KCIA that bring “new” money into the local area. Visitor spending represents expenditures that support jobs and payroll in sectors like lodging, restaurants, retail, entertainment, and local transportation services.

Construction: Capital improvements impacts were based on the latest KCIA capital improvement plan covering the next six years. This investment activity was used to determine the jobs and economic activity generated from capital projects.

These economic impacts modeled in IMPLAN have three different types of activity: direct (those that are directly affected by the scenario), indirect or supplier impacts (economic activity generated by businesses which supply each group), and induced impacts which are caused by re-spending in the economy from the investment modeled in the scenarios. The term “multiplier” impacts is used to describe the re-spending of the direct impacts into the economy, so it includes both indirect and induced impacts.

KCIA Economic Analysis Results - 2024 Calendar Year

For the new 2024 base case, OEFA updated the number of enplanements, airport operations, and the airport's capital and operations budgets, visitor spending, and employment of the tenants at KCIA. The number of enplanements in 2024 was 26,359, which was a reduction of 14% from 2019 enplanement levels of 30,568. Therefore, the number of visitors in 2024 was reduced by 14% from 2019 as well. OEFA assumed that 34.9% of passengers to KCIA were visitors, which was the same assumption used in the last economic impact study.

The number of operations at KCIA in 2024 was 149,559 which was nearly the same as 2019 at 149,316. The total visitors from general aviation operations were assumed to be 60% transient with 2 people on average per operation needed, which resulted in 179,471 annual visitors. In the last study, it was only assumed to have 50% transient operation but examining more recent data showed that the average percentage transient was 60%. Visitor spending by industry category was based on growing the spending amount from the last KCIA economic impact study by the growth in the Seattle Consumer Price Index (CPI). Table 3 shows the visitor spending amount simulated in IMPLAN for the base case scenario for KCIA.

Table 3

2024 Visitor Spending by Industry Group

Industry Sector	Commercial	General Aviation	Total Spending (\$)
Lodging \$ per trip	\$328	\$303	\$57,362,088
Restaurant/Bar \$ per trip	328	304	57,590,404
Local transportation \$ per trip	170	156	29,652,891
Retail \$ per trip	219	201	38,089,181
Entertainment \$ per trip	131	121	22,896,829
Total Spending \$ Per Trip	\$1,177	\$1,085	\$205,591,394

The number of direct jobs that could be identified by matching the Washington ESD database with the KCIA list of tenants in the area near the airport - 8,794 - was used as an employment simulation in the input-output model. The KCIA capital improvement investment was assumed to be \$40.26 million on average over the next six years (2025-2031).

Table 4 on the following page reveals the results for the 2024 base case simulation of KCIA economic impact. The total employment supported by the airport is 14,769 of which 13,060, or 88.4%, are from on-airport and tenant employment. Visitors represented 10.1% of the employment support and 1.5% for the temporary construction employment. The pay rise seen by the employment at KCIA is \$2.1 billion, of which 94% is from the employment at the airport. The same trend is seen in the value added with \$4.28 billion, of which \$4 billion or 94% is from the activities at the airport and tenants, while construction and visitor spending are minor parts of the overall economic impact from KCIA.

Table 4

2024 Economic Impacts of KCIA in King County

	Impacts	On Airport	Visitor	Capital Improvements	U.S. Total
Employment 	Direct	8,794	1,157	166	10,117
	Multiplier *	4,266	333	54	4,653
	Total	13,060	1,489	220	14,769
Payroll 	Direct (\$ bil)	\$1,489.4	\$71.2	\$18.6	\$1,579.2
	Multiplier (\$ bil) *	477.0	36.4	5.6	519.0
	Total (\$ bil)	\$1,966.5	\$107.6	\$24.2	\$2,098.3
Value Added 	Direct (\$ bil)	\$3,171.2	\$153.5	\$26.1	\$3,350.8
	Multiplier (\$ bil) *	859.9	58.8	10.4	929.1
	Total (\$ bil)	\$4,031.1	\$212.3	\$36.5	\$4,279.9

* Multiplier impacts include both indirect and induced effects

Table 5 below shows the tax impacts from KCIA activities in 2024. These activities generated \$660 million in total federal, state, and local taxes. Federal taxes comprise \$504 million (76%) of total taxes, state taxes comprise \$94.8 million (14%), and local taxes make up the remaining 9% of total taxes generated by KCIA activities. The on-airport activities comprise most of the taxes generated by KCIA at \$603 million, or 91% of the total.

Table 5

2024 Tax Spending By Type of Impact (\$)

Taxes	On-Airport	Visitors	Construction	Total Taxes
Local	\$49,792,431	\$10,698,133	\$674,672	\$61,165,236
State	79,129,258	14,656,018	1,035,197	94,820,473
Federal	474,104,131	25,069,177	5,145,984	504,319,292
Total	\$603,025,820	\$50,423,328	\$6,855,853	\$660,305,001

Other Economic Impact Studies of Airports

2025 ACI National Airport Study with WA State Results

A study by ACI North American quantified the impact of 487 U.S. commercial service airports in 2024. The study results found that U.S. commercial airports supported 12.8 million jobs and produced more than \$1.8 trillion in economic output in 2024. Additionally, these airports support more than 12.8 million jobs with a total payroll of nearly \$619 billion. The following sections detail these economic benefits by type of impact. Each type of impact - direct, multiplier, and total - is broken down by category of impact (see Table 6).

Impact Categories



■ **On-Airport:** Impacts associated with airline, airport, terminal concession, rental car, and parking operations



■ **Visitor:** Impacts from visitor spending that occurs off the airport, typically at hotels and restaurants



■ **Capital Improvements:** Impacts taking place both on the airport (construction projects) and off the airport (planning and project design).

Within each category, impacts are categorized further as either direct or multiplier impacts.

Direct Impacts: Direct impacts are the points where initial economic transactions take place. For this study, direct impacts take place on the airport, and off the airport as the result of visitor spending and activities associated with capital improvement projects.

Multiplier Impacts: Multiplier impacts occur because of the recirculation of direct impacts within the defined economy. Multiplier impacts continue until they leak out beyond the defined economy, thus ending the multiplier effect.

Total Impacts: Total impacts are the combination of direct and multiplier impacts yielding the total impacts attributable to the U.S. commercial service airports and their associated activities.

Table 6

Overall Economic Impacts of Commercial Service Airports in the U.S.

	Impacts	On Airport	Visitor	Capital Improvements	U.S. Total
Employment 	Direct	1,393,300	5,074,000	58,700	6,526,000
	Multiplier	3,414,000	2,739,600	133,800	6,287,400
	Total	4,807,300	7,813,600	192,500	12,813,400
Payroll 	Direct (\$ bil)	\$115.4	\$156.3	\$4.1	\$275.8
	Multiplier (\$ bil)	188.1	149.6	7.5	342.5
	Total (\$ bil)	\$303.5	\$303.2	\$11.6	\$618.3
Value Added 	Direct (\$ bil)	\$394.8	\$321.5	\$17.3	\$733.6
	Multiplier (\$ bil)	552.7	527.3	30.8	1,100.0
	Total (\$ bil)	\$947.5	\$848.9	\$48.1	\$1,800.0

Source: Mead & Hunt and IMPLAN

Direct Impacts: Table 6 shows the direct impacts produced by the 487 U.S. commercial service airports. In terms of employment, the visitor category makes the largest employment contribution, with more than 5 million jobs. The on-airport category adds another 1.4 million jobs. With the additional 58,700 jobs from capital improvement projects (CIP) category, the total U.S. direct jobs attributed to commercial service airports amounts to 6.5 million positions, earning nearly \$276 billion in annual payroll. Washington's 13 total airports supported 361,000 jobs and \$18 billion in payroll.

When looking at output, however, it is the on-airport category that contributes the most economic impact, with more than \$395 billion in annual output. Visitors contribute nearly \$322 billion through their off-airport spending, and CIP expenditures are more than \$17 billion.

Multiplier Impacts: Multiplier impacts result from the recirculation of direct impacts. For example, airport employees spend their salary on housing, food, and services, and those expenditures circulate through the local and regional economy, resulting in increased spending, payroll, and employment throughout the economy. Multiplier impacts re-circulate until they eventually leak beyond the geographic region being studied.

Total Impacts: The total impacts for U.S. commercial service airports amount to 12.8 million jobs earning \$618 billion and producing \$1.8 trillion in annual output.

Table 7

2024 Total Impacts of Commercial Service Airports in WA State

	# Airports	Employment	Payroll	Output
WA State	13	361,100	\$18.0 bil	\$54.3 bil

2021 King County International Airport Study Results

The last economic impact study on the King County International Airport was completed by RS&H in 2021 utilizing the Washington State Department of Transportation aviation calculator based on the 2018 IMPLAN base model for Washington State. The results from that study included both pre-pandemic 2019 KCIA Economic impact results along with lower 2020 pandemic impacts. Table 8 below compares the last study results from the 2019 pre-pandemic period to this study's 2024 results of economic impact. The direct employment impact in 2024 was 10,117, which was 27% higher than five years ago. However, the indirect and induced employment impacts were not as large, so the overall employment impact from KCIA was 14,769 in 2024, which was 20% lower than the last study. On the other hand, in this recent study, the labor income and value-added impacts were much larger due to the growth in wages in King County. The overall labor income impact of \$2.08 billion was 68% higher than the past study and value-added was 152% higher overall. These economic impact results are similar to the results found in Table 2 as average wages have growth for KCIA tenant companies by nearly 30% between 2019 and 2024.

Table 8

2019 vs 2024 Comparison of Total Impacts

Direct Impact	2019	2024	Percent Change
Employment	7,963	10,117	27%
Labor Income (\$)	\$757,492,000	\$1,579,241,201	108%
Value Added (\$)	\$889,237,000	\$3,350,765,577	277%
Supplier Impact	2019	2024	Percent Change
Employment	4,998	1,712	-66%
Labor Income (\$)	\$245,061,000	\$254,333,162	4%
Value Added (\$)	\$359,232,000	\$397,013,881	11%
Income Re-spending (Induced) Impact	2019	2024	Percent Change
Employment	5,451	2,941	-46%
Labor Income (\$)	\$238,695,000	\$264,696,095	11%
Value Added (\$)	\$441,372,000	\$532,117,324	21%
Total Impact	2019	2024	Percent Change
Employment	18,412	14,769	-20%
Labor Income (\$)	\$1,241,248,000	\$2,098,270,458	69%
Value Added (\$)	\$1,689,841,000	\$4,279,896,782	153%

Source: RS&H, WA Aviation Calculator, OEFA, IMPLAN

Appendix

Tables of ACI Airport Study - WA State Impacts

This section details the ACI 2025 study of the economic impacts of the 13 commercial service airports in Washington state for 2024. The tables below show the three measures of economic impact (employment, payroll, and output) by type (direct, multiplier, and total), broken out into categories of on-airport, visitor, and capital improvement impacts. The results indicate that the 13 commercial service airports in Washington state generate 361,100 jobs, while this study of KCIA 2024 results indicate that KCIA jobs impact would be about 4% of the statewide jobs impact.

Table 9

Overall Economic Impacts of Commercial Service Airports in WA State

	Impacts	On Airport	Visitor	Capital Improvements	WA State Total
Employment 	Direct	31,700	160,000	1,600	193,300
	Multiplier	77,800	86,400	3,600	167,800
	Total	109,500	246,400	5,200	361,100
Payroll 	Direct (\$ mil)	\$3,072	\$4,928	\$111	\$8,111
	Multiplier (\$ mil)	\$5,006	\$4,633	\$204	\$9,843
	Total (\$ mil)	\$8,078	\$9,561	\$315	\$17,954
Value Added 	Direct (\$ mil)	\$10,905	\$10,140	\$472	\$21,517
	Multiplier (\$ mil)	\$15,267	\$16,631	\$840	\$32,738
	Total (\$ mil)	\$26,172	\$26,771	\$1,312	\$54,255

IMPLAN Economic Model

For this study, it was necessary to use an economic model to estimate the multiplier impacts and certain direct impacts. Both direct employment and payroll associated with visitor expenditures were derived from ratios developed in the economic model were applied to the capital improvement project ('CIP') direct output to obtain direct CIP employment and payroll.

The economic studies that were reviewed for this study used multipliers that reflected induced and indirect impacts within King County or within a state. This study measured the impacts for King County International Airport utilizing Impact Analysis for Planning (IMPLAN) for King County, but other studies have used the Washington state IMPLAN or national IMPLAN models. When measured at the national level, the multiplier impact is higher than state or local multiplier impacts, since the larger geographic area captures more recirculation of the initial economic input before it leaks beyond the county's borders.

The IMPLAN input/output model was used to quantify multiplier impacts. IMPLAN is a linear model that estimates purchases and sales between hundreds of sectors of the economy. The U.S. Forest Service, in cooperation with several other government agencies, initially developed the IMPLAN system to generate regional non-survey input-output models for regions as small as a single county. This modeling process is considered one of the leading methods currently available for estimating the total economic impact of an industry and has been used to estimate economic impacts for individual airports and systems of airports throughout the county. It is a well-accepted methodology of estimating economic impacts attributable to airports. Washington state's IMPLAN model was the basis for the WSDOT Airport Calculator with a base year of 2018, which was used in past studies for KCIA.

The IMPLAN model contains a large economic database used to generate input-output tables. It includes data from sources such as Dun and Bradstreet, the U.S. Department of Commerce, and the U.S. Census Bureau. IMPLAN multipliers and data tables specific to the aviation industry and its related business segments were obtained and used in this analysis just as they were in the previous study.

The IMPLAN model uses direct impacts as inputs that produce multiplier impacts as outputs. The study's approach was to use the direct impacts from an existing statewide or individual airport economic impact study (adjusting payroll and output for inflation to 2024 dollars) and assume that those known conditions were a good representation of the airport. In some cases, based on data validation checks, direct data was deemed unreliable and replaced with direct impact estimates using regression analysis, as described previously.

Multiplier tables determine multiplier impacts based on the direct impacts, and those multiplier tables change each year due to changes in overall economic conditions and the reactions that businesses and consumers have to those conditions. In general, multipliers change when the expenditure patterns of businesses change - affecting indirect impacts - or when the expenditure patterns of households change - affecting induced impacts.