

Charlotte, NC

Market Intelligence Snapshot · Urban Air Mobility Readiness

AirIndex scores 21 U.S. markets on readiness for commercial eVTOL operations on a 0–100 scale across seven factors: state legislation, vertiport infrastructure, regulatory posture, pilot programs, zoning and land use, operator presence, and weather infrastructure. Scores are updated daily from a pipeline of 1,900+ classified regulatory documents, federal filings, operator announcements, and legislative records. This snapshot was prepared specifically for Charlotte in the context of the NC–GA Advanced Air Mobility corridor initiative.

CHARLOTTE'S CURRENT SCORE

25

Charlotte is currently in the **NASCENT tier** — the lowest readiness classification in the AirIndex system, scoring 25 out of 100. Markets in this tier have no meaningful regulatory framework for vertical flight infrastructure, no active vertiport development, and no committed eVTOL operator presence. Operators evaluating where to launch commercial air taxi service do not include NASCENT markets on their shortlists without a visible path to improvement. Given Charlotte's position as the NC anchor for the first interstate AAM corridor, this gap is worth closing before operators make market entry decisions.

HOW CHARLOTTE COMPARES TO PEER MARKETS

Market	Score	Tier
Dallas, TX	100	ADVANCED
Los Angeles, CA	100	ADVANCED
Miami, FL	80	FRIENDLY
New York, NY	70	FRIENDLY
Phoenix, AZ	55	NEUTRAL
Charlotte, NC	25	NASCENT ■ You are here
National avg.	38	EARLY

WHAT IS HOLDING CHARLOTTE'S SCORE DOWN

AirIndex runs a five-question ordinance audit for each market to assess whether the city's legal and regulatory framework supports vertical flight infrastructure. Charlotte has four gaps — all of which are within the city's direct control to fix. None require state legislation or private capital investment.

Question	Status	What this means
1. Correct FAA terminology in city code (heliport, helistop, vertiport per 14 CFR Part 157)	NO	Charlotte's code uses "helipad" — a term not defined in FAA regulations. This creates legal ambiguity in any heliport or vertiport permit application.
2. Heliport/vertiport addressed as permitted or conditional use in zoning ordinance	NO	No clear zoning pathway for vertiport development. Developers cannot determine where a vertiport can be built without a special exception process.

Question	Status	What this means
3. FAA airspace determination required in permit process	NO	Without this requirement, heliports and vertiports can be approved without confirming that the FAA has reviewed the airspace impact — creating liability exposure for the city.
4. NFPA 418 referenced in fire or building code	NO	NFPA 418 is the national fire safety standard for heliports. Without a standalone reference, Charlotte fire code does not explicitly govern vertical flight infrastructure safety.
5. State (NC) has adopted FAA AC 150/5390-2D as enforceable standard	NO	North Carolina has not yet adopted the FAA heliport design standard as enforceable at the state level. The Charlotte-Atlanta corridor announcement signals this is in motion but not yet law.

WHAT MOVES THE SCORE — SPECIFIC ACTIONS AND THEIR IMPACT

Each gap in Charlotte’s ordinance audit has a measurable impact on the AirIndex score. The actions below are ranked by impact and ease. The first three are ordinance changes that can be enacted by Charlotte City Council without state legislative action or capital investment.

Action	Who acts	Score now	Score after	Impact	Tier change
Add vertiport as permitted/conditional use in zoning ordinance	City Council	25	40	+15	NASCENT → EARLY
Update terminology: replace “helipad” with FAA-defined terms throughout city code	City Council	25	33	+8	Score improvement
Require FAA airspace determination as condition of heliport/vertiport permit	City Planning	25	31	+6	Score improvement
Reference NFPA 418 in standalone fire code ordinance	Fire Marshal / Council	25	29	+4	Score improvement
All four actions combined	City	25	52	+27	NASCENT → NEUTRAL

■ **90-Day Window:** The FAA is expected to publish a unified vertical flight infrastructure Advisory Circular for public comment around June 2026 — the merger of AC 150/5390-2D (Heliport Design) and Engineering Brief 105A (Vertiport Design). Cities that update their ordinance language before this publication will be positioned to align with the new federal standard from day one. Cities that wait will face a more complex update process after the fact.

FULL MARKET READINESS & GAP REPORT

This Snapshot	Full Report Overview	Full Report
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The full Market Readiness & Gap Report is available as a scoped engagement. It includes a complete factor breakdown with primary source citations, regulatory trajectory analysis, and a 12-month score projection tied to specific actions. Contact alan@airindex.io or visit airindex.io to request a briefing.