

BIG TIMBER AIRPORT – BIG TIMBER

QUALITATIVE BENEFITS

Since the reintroduction of wolves into Yellowstone National Park, monitoring of their population has been a high priority. State and Federal government wildlife biologists utilize Big Timber airport as a base of operations to count and trap wolves and coyotes in surrounding areas such as Gallatin National Forest, Custer National Forest, Lewis and Clark National Forest, and Yellowstone National Park. The Montana Department of Fish, Wildlife and Parks also uses the airport regularly, flying their aquatic and wildlife biologist in through Big Timber Airport to conduct wildlife surveys.

FAA data reveal that air charter companies utilize Big Timber Airport on a regular basis. Air charter companies operate nonstop flights into Big Timber from Chicago, Philadelphia, San Diego, Memphis, and Salt Lake City, among others. Visitors from the Chicago area arrive on corporate jets and often stay for durations of three to five days. Visitors from the San Diego area regularly arrive on turbo prop aircraft, and also stay in the Big Timber area for durations of three to five days. Corporate executives and owners of summer homes utilize Big Timber Airport as a gateway to the Yellowstone region.

In addition to wildlife management and air charter activity, the Big Timber Airport is utilized for various other activities. The airport is a base for agricultural spraying during the summer months, serving farmers and ranchers in the Yellowstone River valley. The spraying includes both insecticide and herbicide, specifically targeting weeds and leafy spurge. Forest firefighting activities have also been based at Big Timber Airport in the past, including the 176,000-acre Derby Fire in 2006 and reseedling of burned areas by aerial application aircraft. Medical evacuation is another aviation activity at Big Timber Airport. Air ambulances fly patients from Pioneer Medical Center in Big Timber to larger regional health care facilities in Billings and Salt Lake City. Additionally, the airport is used as a refueling stop for aerial inspections of pipeline and electric transmission lines.



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MONTANA
ECONOMIC IMPACT OF AIRPORTS STUDY

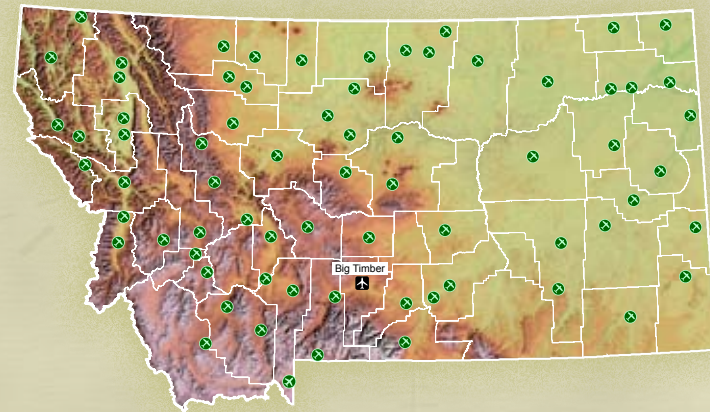
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AIRPORT LOCATION

Big Timber Airport is located three miles southwest of Big Timber, Montana, in Sweet Grass County. Big Timber boasts outstanding scenery provided by the mountain ranges to the south and west, including the beautiful Crazy Mountains. Outdoor recreational opportunities are limitless and include excellent blue-ribbon trout fishing on the Yellowstone River, hunting, and hiking. Area attractions include the Crazy Mountain Museum, Lewis and Clark Native Plant Garden, and Harrison Homestead. The Airport is conveniently located along Interstate 90, which provides immediate access to Billings, Montana to the east and Bozeman and Butte, Montana to the west. Big Timber is the county seat of Sweet Grass County.

Big Timber has a population of approximately 1,770. Major employers in the area include Stillwater Mining, Stillwater Mining, Big T IGA, Big Timber Waterslide, Country Skillet Restaurant, Frosty Freez, Sharps Rifles-Shiloh Rifle Manufacturing Company, The Grand Hotel & Restaurant, Prospector Pizza Inc., Big Timber School District, and the Pioneer Medical Facility.

The 325-acre airport's primary runway, Runway 6/24, measures 5,285 feet in length and 75 feet in width. Runway 18/36 is a turf runway and measures 3,475 feet in length and 75 feet in width. The airport, with 15 based aircraft, experiences approximately 7,200 aircraft operations annually.



STATEWIDE RESULTS

Economic benefits in the Montana Economic Impact of Airports Study are expressed in terms of jobs, payroll, and annual economic activity or output.

Jobs/Employment

An estimated 18,800 jobs in Montana are in some way supported by the commercial and general aviation airports. These are jobs that are associated with on-airport businesses, tenants, and other activities that are located on commercial or general aviation airports in the State. In addition, spending by visitors arriving in Montana by air helps to support other jobs. When airport improvements are made, additional jobs are supported by the airports over the duration of these projects.

Payroll/Earnings

The 18,800 jobs in Montana that are linked to the commercial and general aviation airports account for over \$600 million in annual payroll. Airport related payroll is a key component of the economic benefit cycle that starts at the airport. It was this economic cycle that was measured by this study's induced benefits. When those employed by on-airport businesses use their paycheck to

purchase groceries, new clothes, or household items, their spending helps to support other jobs in the community and the payroll associated with these jobs. The initial benefits that start at the airports continue to multiply once they enter the State's economy.

Annual Economic Activity/Output

To operate Montana's airports, businesses located on the airports and businesses that support visitors who arrive in Montana via the airports all require the purchase of goods and services. These expenditures are most often in addition to those benefits identified in the payroll and earnings category. Benefits in this category are expressed in this study as total annual economic activity or output. Annual economic output related to the airports is typically assumed to be the sum of annual gross sales and average annual capital expenditures, including capital improvement projects.

JOBS..... 18,800

PAYROLL.....\$600 MILLION

OUTPUT.....\$1.56 BILLION

MONTANA ECONOMIC IMPACT OF AIRPORTS STUDY

ECONOMIC IMPACT ANALYSIS

Economic impacts at an airport are measured through employment, payroll, and output (spending). On-airport business and government activities (direct impacts) account for a significant portion of an airport's first-round economic benefits. Additional first-round benefits are also linked to visitors who arrive via the State's system of airports (indirect impacts). Spending by these visitors supports additional employment and associated annual payroll. These first-round impacts create additional spin-off benefits that ripple through the economy. These second-round or induced benefits were measured with Montana-specific IMPLAN multipliers. When combined, first-round and second-round benefits equal the total economic impact associated with each airport.

First-Round Impact

In 2008, there was one aviation-related tenant located on the airport. This tenant functions as the as the FBO and as airport management for the airport sponsor. In order to preserve tenant confidentiality, total tenant and visitor impacts have been combined. This tenant's direct employment, payroll, and output impacts were derived from survey data. For 2008, the total combined first-round output stemming from all on-airport tenants and general aviation visitors to Big Timber Airport was approximately \$504,000. Total first-round full-time employment related to airport tenants and general aviation visitors is estimated at seven persons with a total first-round payroll of approximately \$183,500 annually. Survey data indicated that approximately 1,155 visitors used the airport in 2008.

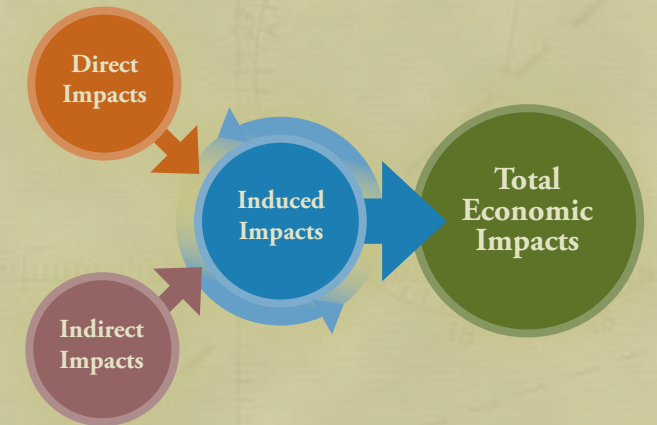
Second-Round Impact

The first-round impacts associated with on-airport tenants and general aviation visitors also create second-round impacts throughout the State. Second-round impacts are induced impacts calculated using the Montana specific IMPLAN multipliers. The accompanying table presents the 2008 first-round, second-round, and total impacts for output, payroll, and employment as they relate to on-airport tenants and general aviation visitors.

Total Impact

For 2008, the total output (including first-round and second-round impacts) stemming from all on-airport tenants and general aviation visitors to Big Timber Airport was approximately \$822,300. Total full-time employment related to airport tenants and general aviation visitors, including all second-round impacts, is estimated at approximately 14 persons, with a total annual payroll (first-round and second-round) of approximately \$331,100 associated with these jobs.

METHODOLOGY



AIRPORT SUMMARY TABLE

FIRST-ROUND ECONOMIC IMPACTS

On-Airport	Visitor Spending
<ul style="list-style-type: none"> • FAA, Other Government • Airport Management • Aircraft maintenance • Vendors • Retail & Restaurant • Car Rental • Parking • Other Ground Transportation • Fixed Based Operators 	<ul style="list-style-type: none"> • Hotels • Retail & Restaurants • Travel Agents • Convention Centers • Tourist Destinations
7.0 Jobs \$183,500 in Payroll \$504,000 in Economic Output	

SECOND-ROUND ECONOMIC IMPACTS

<ul style="list-style-type: none"> • Suppliers of Materials & Services to Airports • Air Dependent Businesses • Visitor Dependent Businesses • Consumer Product and Service Sales
6.5 Jobs \$147,600 in Payroll \$318,300 in Economic Output

TOTAL ECONOMIC IMPACTS

13.5 Jobs \$331,100 in Wages \$822,300 in Economic Activity
