

ENNIS-BIG SKY AIRPORT – ENNIS

QUALITATIVE BENEFITS

In addition to the economic benefits described above, Ennis – Big Sky Airport provides access and services that promote the well being of the local community. The airport is primarily a base for recreational flying, corporate aviation, and visitors accessing the region's resorts. In addition to these activities, the airport is used extensively for flight training, emergency medical evacuation, and wildlife management. Other flight activity that occurs at the airport on an occasional basis includes agricultural spraying, medical shipments and patient transfer, real estate tours, and agricultural and forest management.

According to airport management data, the major airport users include the following:

- Fishing and hunting outfitters
- Real estate companies
- Out-of-state homeowners
- Local ranches
- Montana Division of Fish, Wildlife, and Parks
- U.S. Department of Agriculture
- Medical evacuation companies, including Billings Deaconess Hospital, Air Idaho Rescue, and Edwards Jet Center
- Air charter companies, including Flexjet, CitationShares, and NetJets

FAA data indicates that Quality Electric of Lawrence Inc., San Tomo Partners, Simbol Commercial Inc., and T-L Irrigation Company utilized the airport for general aviation during the past year. While most itinerant aircraft traveled to the airport from within Montana and nearby Rocky Mountain States, FAA data also indicates aircraft traveled from as far away as Las Vegas, Nevada, Seattle, Washington, and Bend, Oregon.



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MONTANA
ECONOMIC IMPACT OF AIRPORTS STUDY

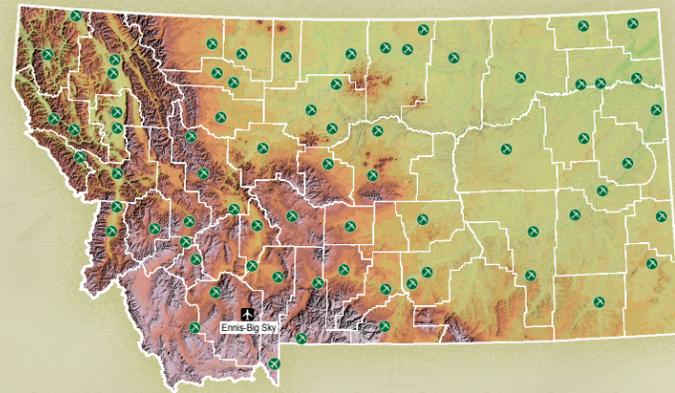
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AIRPORT LOCATION

Big Sky Airport is located six miles southeast of Ennis, Montana, in Madison County. Surrounded by the Madison Range, the Gravelly Range, and Tobacco Root Mountains, Ennis offers visitors spectacular mountain views, excellent outdoor recreation opportunities with a Western flavor. Hiking, camping, whitewater rafting, and the best fly-fishing are found along the Madison River and within the nearly three million acres of publicly accessible National Forest lands that surround Ennis. Ennis is also located in close proximity to Yellowstone National Park.

Ennis has a population of approximately 1,000. Major employment sectors in the area include agriculture, forestry, fishing, and hunting, construction, educational services, and health care and social assistance.

The 200-acre airport's primary runway, Runway 16/34, measures 6,600 feet in length and 75 feet in width. The airport, with ten based aircraft, experiences approximately 11,000 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 were three aviation-related tenants on the airport, including airport management, who supported over three employees. These tenants' direct or first-round employment, payroll, and output impacts were derived from survey data. Direct output from all on-airport aviation-related tenants is estimated at \$107,000 annually. The estimated direct annual payroll of these tenants is \$27,000. Operational data indicated that approximately 1,518 visitors used the airport. Visitor-related spending supported an additional one part-time job for employees earning over \$9,800 annually. Indirect output from general aviation visitors is estimated at \$30,400.

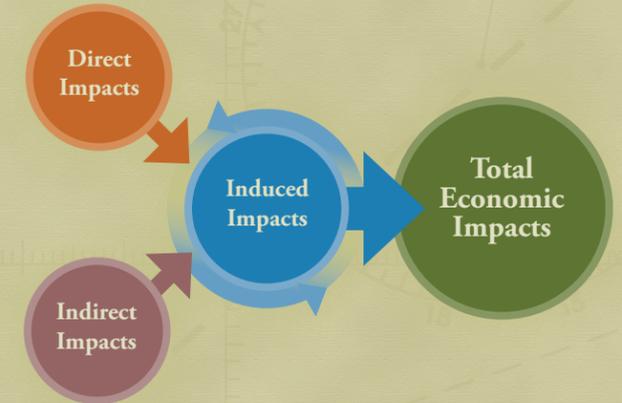
Second-Round Impact

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 Ennis-Big Sky Airport was approximately \$225,000. Total full-time employment related to airport tenants and general aviation visitors, including all second-round impacts, is estimated at approximately 7.5 positions, with a total annual payroll (first round and second-round) of approximately \$63,000 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
<p>3.5 Jobs \$27,000 in Payroll \$107,000 in Economic Output</p>	<p>0.5 Jobs \$9,800 in Payroll \$30,400 in Economic Output</p>

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
<p>3.5 Jobs \$26,200 in Payroll \$87,600 in Economic Output</p>

TOTAL ECONOMIC IMPACTS

<p>7.5 Jobs \$63,000 in Wages \$225,000 in Economic Activity</p>
