

TILLITT FIELD – FORSYTH

QUALITATIVE BENEFITS

In addition to the economic benefits described above, Tillitt Field provides access and services that promote the well being of the local community. Aviation activities that take place on a regular basis include recreational flying, seasonal agricultural spraying, and corporate activity related to local car dealers and grain distributors. Rosebud Health Care Center in Forsyth also utilizes the airport frequently. A survey of 35 hospitals in Montana gathered data to obtain information relating to how often hospitals use airports in Montana to bring in specialists from out of the area, as well as how often airports are used for patient transfer. Survey data indicated Rosebud Health Care Center uses Tillitt Field Airport 25 times per year on average to bring doctors and specialists to the hospital to conduct clinics. These doctors fly in primarily from Billings. The hospital also uses the airport 20 to 25 times per year on average for emergency patient transfer via air ambulance.



Tillitt Field Airport is also used frequently as a gateway for recreational activities, including hunting. Other aviation activities that occur on an as needed basis at the airport include flight training, law enforcement, and environmental patrols.



Airport management indicates regular users of the airport include a local feed distributor and Heberle Ford. FAA data indicates Edwards Jet Center, a Billings-based charter company, Krause-Gentle Corporation, and Rocky Mountain College utilized the airport for general aviation during the past year.



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TILLITT FIELD FORSYTH



MONTANA
ECONOMIC IMPACT OF AIRPORTS STUDY

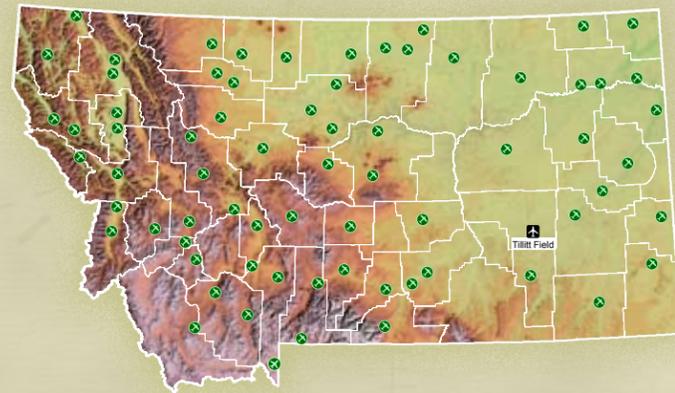
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AIRPORT LOCATION

Tillitt Field is located three miles east of Forsyth, Montana, in Rosebud County. Nestled along the banks of the Yellowstone River in eastern Montana, Forsyth offers visitors a wide variety of outdoor recreation activities in a small town with plenty of western character. Hunting, boating, camping, hiking, and fishing enthusiasts can enjoy the opportunities provided at Rosebud State Recreation Area, located along the banks of the Yellowstone River. Tourists interested in the history of the area can take a stroll down Main Street, which showcases the opulent buildings that are reminders of the town's wealthy past as a trading hub. The Airport is adjacent to Interstate 94. Forsyth is the county seat of Rosebud County.

Forsyth has a population of approximately 1,900. Major employers in Rosebud County include Colstrip Electric, Home Care Services, Lame Deer Trading Post, PP & L of Montana, Ponderosa Butte Public Golf Course, Power Maintenance Resources Inc (PMRI), Prince Inc., Rosebud Community Hospital, St. Labre Indian School, and Western Energy.

The 266-acre airport's primary runway, Runway 8/26, measures 4,799 feet in length and 75 feet in width. The airport, with 27 based aircraft, experiences approximately 9,170 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 Tillitt Field was approximately \$218,500. Total first-round full-time employment related to airport tenants and general aviation visitors is estimated at four persons with a total first-round payroll of approximately \$93,900 annually. Survey data indicated that approximately 1,327 visitors used the airport in 2008.

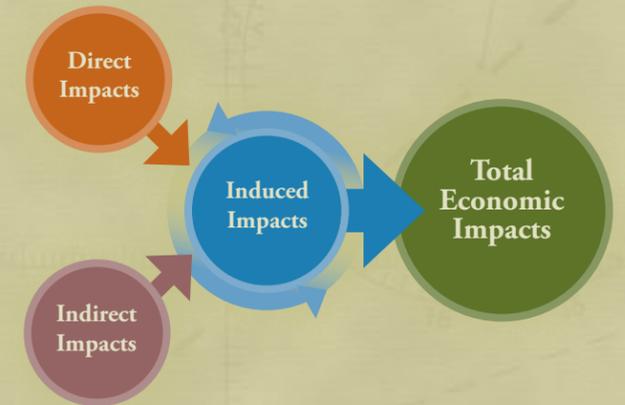
Second-Round Impact

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 Tillitt Field was approximately \$362,700. Total full-time employment related to airport tenants and general aviation visitors, including all second-round impacts, is estimated at approximately seven persons, with a total annual payroll (first-round and second-round) of approximately \$164,600 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
4.0 Jobs \$93,900 in Payroll \$218,500 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
3.0 Jobs \$70,700 in Payroll \$143,200 in Economic Output

TOTAL ECONOMIC IMPACTS

7.0 Jobs \$164,600 in Wages \$362,700 in Economic Activity
