

TURNER AIRPORT – TURNER

QUALITATIVE BENEFITS

In addition to the economic benefits described above, Turner Airport provides access and services that promote the well being of the local community. The airport is primarily a base for recreational flying and aerial agricultural spraying during the spring, summer, and fall months. Cattle buyers also frequently use the airport to fly into the area. Other aviation activities that occur occasionally at the airport include civilian flight training, staging for community events, career training and education, search and rescue operations, aerial photography and aerial surveying, and Border Patrol operations by the Department of Homeland Security.

According to airport management data, the major airport user is Snake Butte Applicators, which conducts approximately 30 operations per week during the spring, summer, and fall months. FAA data indicates Exec Air Montana Inc. utilized the airport during the past year. Billings based Rocky Mountain College has used the airport for cross country flight instruction.



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TURNER AIRPORT TURNER



M O N T A N A
ECONOMIC IMPACT OF AIRPORTS STUDY

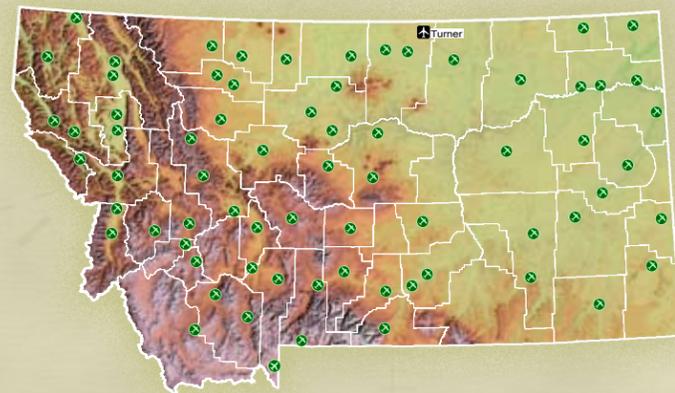
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AIRPORT LOCATION

Turner Airport is located one mile northeast of Turner, Montana, in Blaine County. Located twelve miles south of the Canadian border on the plains of northern Montana, the small town of Turner offers visitors several outstanding attractions in close proximity. Wildlife viewing is excellent at Black Coulee National Wildlife Refuge south of Turner and Hewitt Lake National Wildlife Refuge southeast of Turner. The Fort Belknap Indian Reservation is home to the Assiniboine and Gros Ventre tribes, who add their rich culture to the area. Other nearby attractions include the historic Bear Paw Battlefield and the natural hot mineral water at Sleeping Buffalo Hot Springs.

Turner has a population of approximately 200. Major employment sectors in the area include accommodation and food services and retail trade.

The 71-acre airport's primary runway, Runway 7/25, measures 3,600 feet in length and 60 feet in width. A second runway, Runway 10/28, is a turf runway that measures 2,680 feet in length and 90 feet in width. The airport, with four based aircraft, experiences approximately 3,800 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 no aviation-related tenants located on the airport. All economic impacts generated by the airport are the result of sponsor operation of the airport and visitor related impacts. For 2008, the total combined first round output stemming from all sponsor activity and general aviation visitors to Turner Airport was approximately \$200. Total first round full-time employment related to airport tenants and general aviation visitors is estimated at 1.5 persons with a total first round payroll of approximately \$200 annually. Survey data indicated that approximately 71 visitors used the airport in 2008.

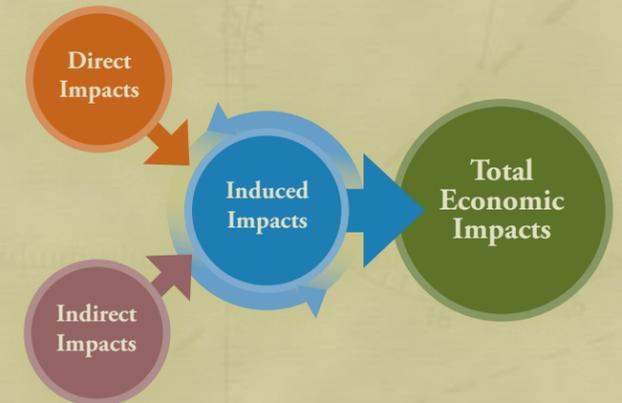
Second-Round Impact

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 Turner Airport was approximately \$1,400. Total full-time employment related to airport tenants and general aviation visitors, including all second-round impacts, is estimated at approximately 2.5 persons, with a total annual payroll (first-round and second-round) of approximately \$300 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>1.5 Jobs \$200 in Payroll \$200 in Economic Output</p>	<p>0 Jobs \$0 in Payroll \$700 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>1.0 Jobs \$100 in Payroll \$500 in Economic Output</p>

TOTAL ECONOMIC IMPACTS

<p>2.5 Jobs \$300 in Wages \$1,400 in Economic Activity</p>
