

The MoDOT Aviation Section would like to thank Missouri airports, passengers, airport users, tenants, and stakeholders for their valuable input and participation on this project.



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MoDOT Aviation Section

105 West Capitol Avenue
P.O. Box 270
Jefferson City, MO 65102
(573) 751-2589
aviation@modot.mo.gov

SGF | Springfield-Branson National Airport
Springfield, MO

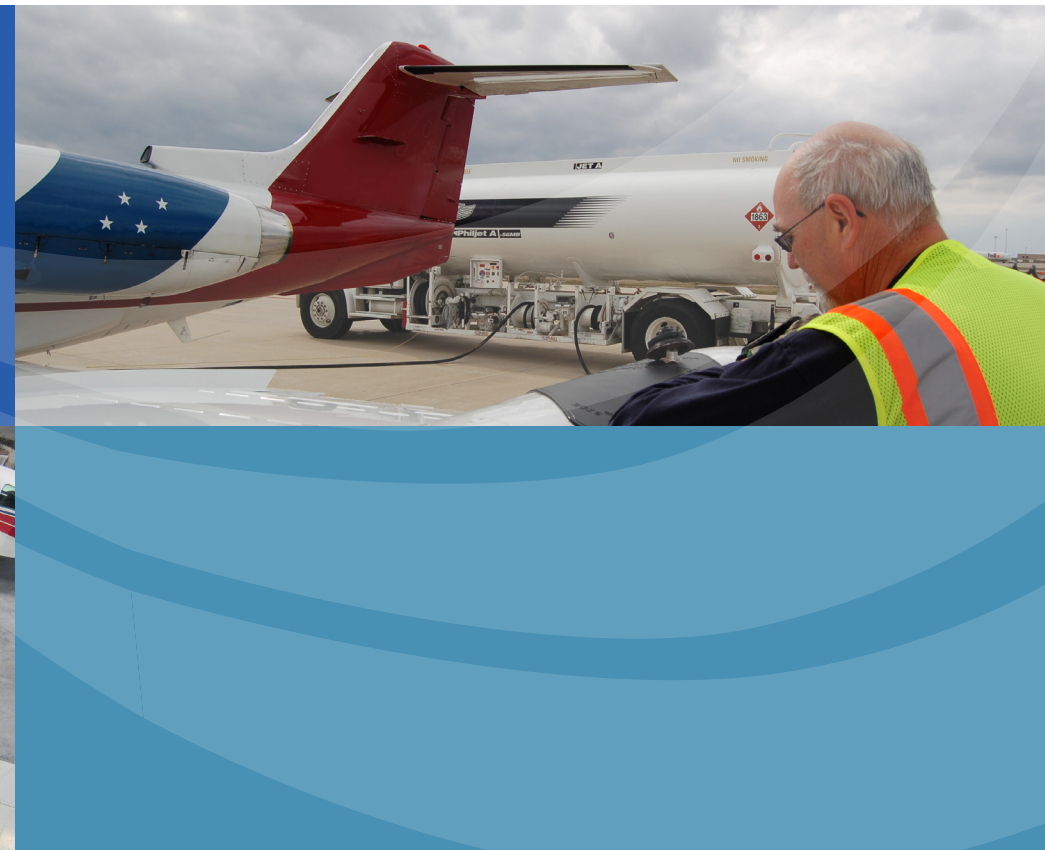


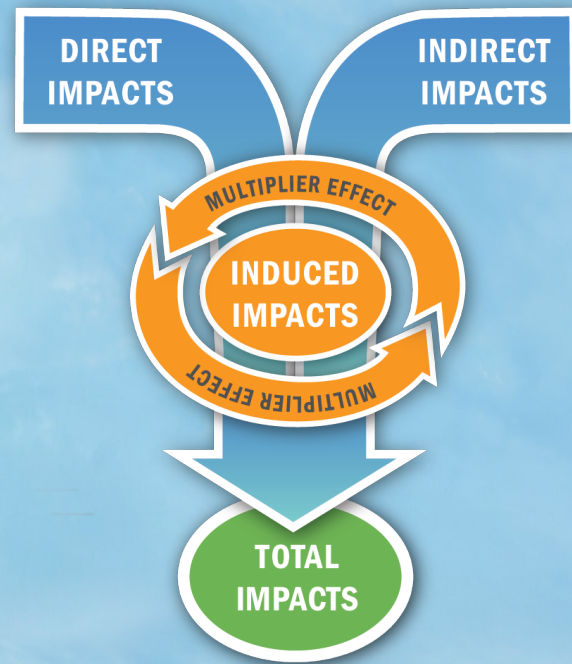
Missouri Statewide Airports Economic Impact Study

- Missouri is served by **nine** commercial service airports in the state and **99** publicly owned, public use general aviation airports.
- Missouri's commercial service airports enplaned nearly **12 million** passengers in 2012.
- Missouri supported approximately **264,000** general aviation visitors at airports in 2012.
- Airports in Missouri support more than **420** on-airport aviation related businesses.
- More than **\$130 million** was invested in the state's airports in 2012 through updates and renovations.
- Missouri airports support **11** scheduled commercial airlines throughout the state.
- More than **195,000** tons of cargo are transported by air in Missouri each year.



Prepared by: Landrum & Brown, Incorporated | 2013





Economic Impact Study

Missouri's airport system is not only a means of safe and efficient transportation, but also provides over 100,000 jobs and accounts for more than \$11 billion in total economic activity. Each of the airports in Missouri has a specific impact on its local community that goes far beyond the local level to serve as a catalyst for economic growth.

STUDY PROCESS

Similar to the 2002 Missouri economic analysis, the economic impact generated by Missouri's airports is quantified in terms of direct, indirect, and induced economic activity and spending.

Direct impacts are based on the employment, wages, and sales generated by on-airport business activity. Common direct impacts stem from tenants like fixed-base operators (FBOs) or aircraft maintenance operations.

Indirect impacts arise from visitors arriving by aircraft and their spending on food, hotels, entertainment, transportation, and other activities. These expenditures support additional jobs, wages, and output.

Induced impacts, also referred to as multiplier impacts, are created through the "spin-off" effect of users purchasing goods and services from other local businesses and through workers spending wages and other income for household goods and services. For example, when an airport employee is paid, he or she uses their salary to purchase local goods and services at businesses in the area, which in turn spend their revenue locally, thus generating additional economic activity in the region.

Combined, the direct, indirect and induced impacts determine the total economic impacts for each airport and the statewide airport system.

IMPACT MEASURES

Jobs represent the number of people who are employed and are presented as full-time equivalent jobs.

Payroll represents the total annual wages, salaries, and benefits paid to all workers.

Output measures the value of goods, services and capital expenditures.

Statewide Economic Impacts

TOTAL JOBS
100,621

TOTAL PAYROLL
\$3,128,646,000

TOTAL OUTPUT
\$11,101,699,000



Springfield-Branson National Airport

TOTAL JOBS
4,454

TOTAL PAYROLL
\$154,280,000

TOTAL OUTPUT
\$402,017,000

BENEFITS OF THE AIRPORT

The Springfield-Branson National Airport (SGF) is the gateway to the Missouri Ozarks and Southwest Missouri. With non-stop airline service to ten cities, SGF enjoys connectivity to the national air system that is unusual for a market its size—the population of the airport's service area is approximately one million people. Similar sized markets typically have seven non-stop destinations. Four airlines provide service at SGF: Allegiant, American, Delta, and United. Non-stop destinations include Los Angeles, Phoenix, Las Vegas, Denver, Dallas/Ft. Worth, Chicago, Atlanta, Orlando, Tampa, and Ft. Myers/Punta Gorda.

Besides airline service, SGF is host to a general aviation community with robust corporate activity, charter service, and emergency medical transport. Cargo service and the military also play a key role at SGF — the Missouri National Guard, 1107th Aviation Group, operates a helicopter repair depot for U.S. armed forces.

More than 40 companies are located at SGF, including the four passenger airlines mentioned above, rental car agencies, airport concessions, the online travel company Expedia, Federal Express, United Parcel Service, U.S. Customs, and the National Guard. Expedia alone employs nearly 1,000 people.

Besides being a key economic engine for the region, SGF has made itself a key player in the local cultural scene. Working with the local arts council, the airport is home to a permanent art gallery; it also plays host to Flights of Fancy, which is an annual celebration of the arts. Additionally, the airport sponsors an annual travel show, along with several professional networking events.

While the airport's enplanements have not consistently increased every year, the overall average growth over the past 15 years is 4% a year, with total enplanements over the period growing by 93%.

