

EXECUTIVE SUMMARY
INDIANA AIRPORTS' ECONOMIC IMPACT STUDY

2012



ACKNOWLEDGEMENTS

Special thanks to the many people and entities that helped make this study possible.

DAVID HOLT, Conexus Indiana



TIM JEFFRIES, Conexus Indiana

KEVIN RECTOR, Indiana Department of Transportation (INDOT)



MARCUS DIAL, INDOT

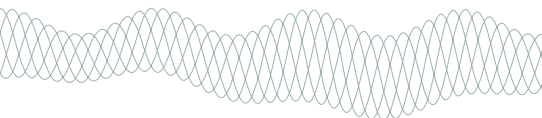
PAUL SHAFFER, Butler, Fairman and Seufert



DANIEL FINDLEY, North Carolina State University

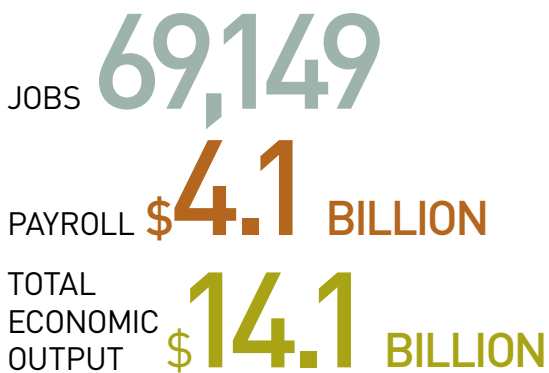
BART GIESLER, Aviation Association of Indiana (AAI)

LACEY BERKSHIRE, AAI



HOOSIER AIRPORTS ARE THE LIFEBLOOD FOR HUNDREDS OF COMPANIES ACROSS THE STATE, ALLOWING THEM TO COMPETE IN A GLOBAL ECONOMY WHILE SUPPORTING JOBS AND ECONOMIC GROWTH IN SMALL COMMUNITIES ACROSS THE HEARTLAND.

TOTAL ECONOMIC IMPACT OF INDIANA AIRPORTS



“General Aviation and community airports play a critical role in the lives of our citizens, as well as in the operation of our businesses and farms; and the state of Indiana has a significant interest in the continued vitality of general aviation, aerospace, aircraft manufacturing, educational institutions and aviation organizations, and community airports and airport operators.”

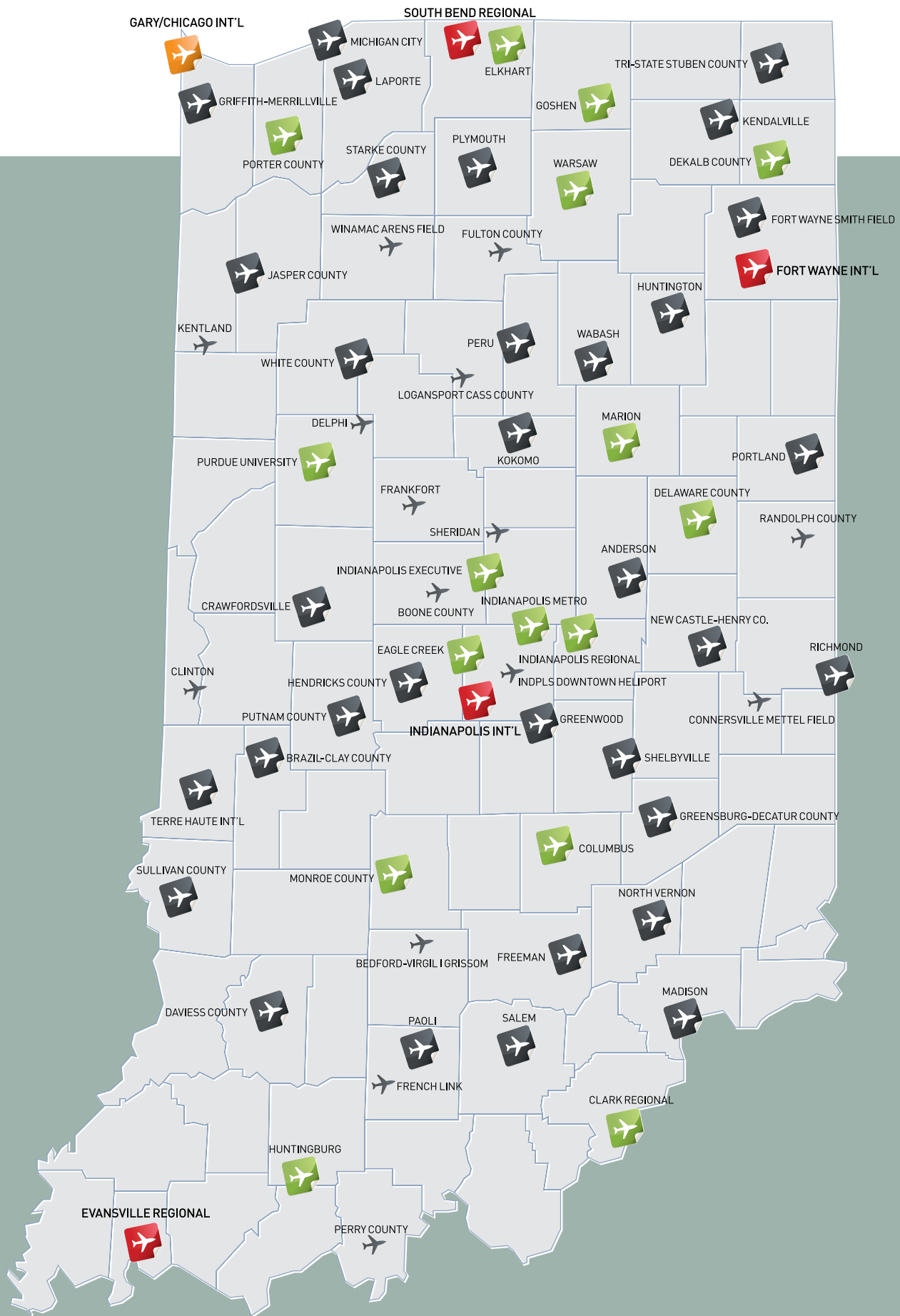
– Gov. Mitch Daniels in his 2012 General Aviation Appreciation Month Proclamation

INDIANA AIRPORTS = HOOSIER JOBS

Indiana’s official State Aviation System Plan includes 69 airports that serve the air transportation needs of more than 6.5 million Hoosiers and, in doing so, directly support more than 69,000 Hoosier jobs. The positive effects Indiana’s airports have on the economic sectors of the state are immense. These diverse benefits range from job creation to emergency services and play a crucial role in both Indiana’s economy and the lives of its residents by facilitating the movement of people and commerce each and every day.

To best quantify and illustrate the enormous influence airports have on the economy, the Aviation Association of Indiana and several partner organizations conducted an economic impact study to determine how many jobs are created and sustained as a direct result of Indiana airports, and to measure the value of those jobs and economic productivity on the Indiana economy. The following report details those impacts and was a collaborative effort between Conexus Indiana (Conexus), the Indiana Department of Transportation’s Office of Aviation (INDOT) and the Aviation Association of Indiana (AAI).






INDIANA'S AIRPORT SYSTEM


Indiana is served by a variety of airports that play different roles in supporting the State of Indiana and the communities that they serve. The Federal Aviation Administration (FAA) has recently updated its airports classification system to more clearly define the different types of general aviation airports.





Commercial Service Airports:


 Publicly owned airports that have at least 2,500 passenger boardings each calendar year and receive scheduled passenger service.

General Aviation Airports:

 **NATIONAL** – Serves national / global markets. Very high levels of activity with many jets and multi-engine propeller aircraft. Averaging about 200 total based aircraft, including 30 jets.

 **REGIONAL** – Serves regional / national markets. High levels of activity with some jets and multi-engine propeller aircraft. Averaging about 90 total based aircraft, including 3 jets.

 **LOCAL** – Serves local / regional markets. Moderate levels of activity with some multi-engine propeller aircraft. Averaging about 33 total based propeller-driven aircraft and no jets.

 **BASIC / UNCATEGORIZED** – Often serves critical aeronautical functions within local and regional markets. Moderate to low levels of activity. Averaging about 10 propeller-driven aircraft and no jets.



STUDY METHODOLOGY

This year's economic impact study differs in methodology from previous AAI-sponsored economic impact studies. In consultation with INDOT, and with advice from the lead advisor on North Carolina's airport economic impact study – Conexus and AAI adopted a new methodology that utilized tactics and modeling tools employed by several states around the country and recognized by the FAA. The new methodology captures impacts from the following sources:

On-Airport Businesses

On-airport businesses include traditional businesses one might associate with the ongoing operation and function of an airport. Examples include airlines, fixed-based operators (FBOs), flight schools, charter operations, air cargo operators, security, air traffic control, aviation maintenance, airport management, and other businesses physically located on the airport grounds.

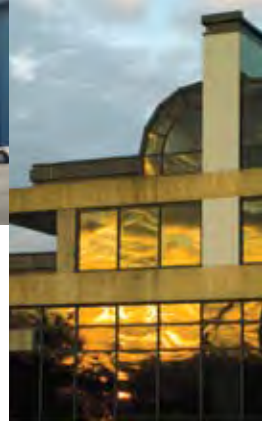


Airport Users

Airport users include businesses and other entities that regularly utilize the airport for business purposes but are not physically located on the airport grounds and thus are not categorized as an "on-airport" business.

Multiplier Impacts

The direct economic impact of both on-airport businesses and airport users does not paint the full picture of the total impact on the economy. In both cases, the impact of on-airport business and airport users is amplified by additional multipliers that positively affect both the state and local community. These multiplier impacts are the result of either the business itself or the business employee spending money in the local economy. For example, if a flight instructor takes his or her paycheck and buys lunch at a local restaurant, that money supports the payroll for the waiter, cook, and busboy at the local restaurant who, in turn, may spend their paychecks on childcare, groceries, or other items, continuing the cycle until those dollars may eventually leave the community. As a result of this cycle of spending, additional economic impact has been realized and is captured as a multiplier impact.



STUDY PROCESS

Study Process:

1. Over the course of 2011 and 2012, operators at each of the 69 airports in the Indiana State Aviation System Plan were asked to complete a survey process where they not only provided information on the number of direct employees at their airport but also gathered survey responses from airport users who reported three items:
 - a. Whether or not their business was physically located on the airport or off the airport grounds.
 - b. Their current number of employees.
 - c. What percentage of sales or output was directly attributable to their use of the airport.
2. After all key information about an airport was gathered, Conexus Indiana input the information into the IMPLAN model. The IMPLAN model, a national economic modeling program recognized by the FAA, combines the employment data provided through the survey process with economic data that is both location- and industry-specific to calculate the economic impact of on-airport business, airport users, and their associated multiplier impacts. Those impacts are expressed in terms of jobs, payroll, and economic output.

NOTE: Due to the fact that the methodology of this year's economic impact study differs significantly from previous studies (previous studies only measured the impact of on-airport businesses and not of all airport users) comparisons between 2012 results and previous results would not be appropriate.

JOBS

Measures the number of full-time equivalent employees related to direct airport activity, identified as either on-airport business or airport user. A part-time employee is measured in relation to their equivalent time as a full-time employee.

PAYROLL

Measures the annual wages, salary, and benefits paid to all workers whose jobs are directly linked to airport activity.

ECONOMIC OUTPUT

Measures the total value of goods, services, and capital expenditures that result from Indiana aviation.

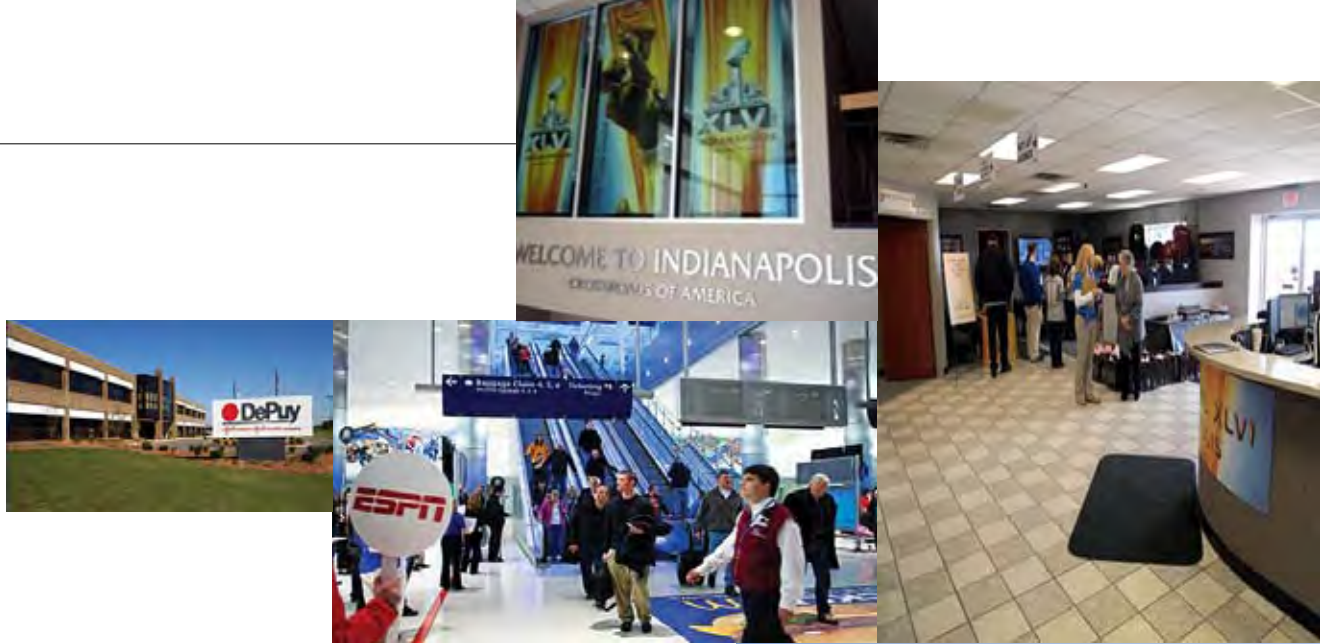
Since the study relies heavily on survey data input, much of which was difficult for airports to obtain from their users, it should be assumed that the study presents a conservative estimate of the overall economic impact of Indiana airports.

Although an airport may not have listed impacts from "Airport Users" does not mean they do not have airport users or impacts as a result. It was simply that that particular airport was not able to collect that information from its users and thus it was not reported.

ECONOMIC IMPACT SUMMARY – AIRPORTS MEAN HOOSIER JOBS

The 69 airports that comprise the Indiana State Aviation System Plan support the aviation needs of more than 6.5M Hoosiers and the business clusters that drive Indiana’s economy, including life sciences, logistics, advanced manufacturing, clean-tech and IT. These businesses depend on the state’s airport system to connect them to the global marketplace further underlining the importance of Indiana airports to the Indiana economy.

	IMPACTS	INDIANAPOLIS INTERNATIONAL	OTHER COMMERCIAL AIRPORTS	GENERAL AVIATION AIRPORTS	TOTAL
JOBS	On-Airport	9,431	1,493	2,108	13,032
	Airport Users	6,535	9,068	19,139	34,742
	Multiplier	4,976	5,514	10,885	21,375
TOTAL		20,942	16,075	32,132	69,149
PAYROLL	On-Airport	\$540.8M	\$81M	\$126.3M	\$748.1M
	Airport Users	\$588.4M	\$630.5M	\$1,239.0M	\$2,457.9M
	Multiplier	\$290.8M	\$215.9M	\$417.8M	\$924.5M
TOTAL		\$1,420.0M	\$927.4M	\$1,783.1M	\$4,130.5M
ECONOMIC OUTPUT	On-Airport	\$1,466.7M	\$191.7M	\$309.0M	\$1,967.4M
	Airport Users	\$2,092.7M	\$2,812.2M	\$4,310.4M	\$9,215.3M
	Multiplier	\$1,015.5M	\$636.9M	\$1,266.6M	\$2,919.7M
TOTAL		\$4,574.9M	\$3,640.8M	\$5,886.0M	\$14,101.7M



TOTAL ECONOMIC IMPACT OF INDIANA AIRPORTS

JOB **69,149**

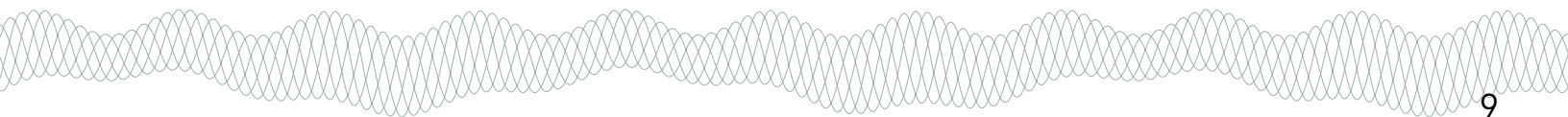
PAYROLL **\$4.1 BILLION**

TOTAL ECONOMIC OUTPUT **\$14.1 BILLION**

THE CRUCIAL ROLE OF AIRPORTS IN HOOSIER COMMUNITIES

Airports play a crucial role in many aspects of our communities that goes beyond the measurable impacts of an economic impact study. Airports across the Heartland support our Hoosier communities by providing support to:

- AIR CARGO AND LOGISTICS OPERATIONS
- EMERGENCY MEDICAL TRANSPORT
- LAW ENFORCEMENT
- AERIAL AGRICULTURAL OPERATIONS
- SEARCH-AND-RESCUE / DISASTER RELIEF
- AERIAL PHOTOGRAPHY, SURVEYING, AND INSPECTION
- FLIGHT TRAINING AND EDUCATION
- AIRSHOWS AND COMMUNITY EVENTS
- ANGEL FLIGHTS / CHARITABLE TRANSPORTATION
- DONATED ORGAN PROCUREMENT





DETAILED RESULTS COMMERCIAL SERVICE AIRPORTS

		ON-AIRPORT	AIRPORT USERS	MULTIPLIER	TOTAL
Indianapolis International	JOBS	9,430.8	6535.8	4975.6	20942.2
	PAYROLL	\$540,800,795	\$588,394,083	\$290,778,983	\$1,419,973,861
	OUTPUT	\$1,466,680,045	\$2,092,694,033	\$1,015,482,750	\$4,574,856,838
Evansville Regional	JOBS	148.5	3124.8	1300.9	4574.2
	PAYROLL	\$10,963,480	\$197,536,719	\$50,740,890	\$259,241,089
	OUTPUT	\$25,143,966	\$765,833,952	\$154,951,530	\$945,979,448
Fort Wayne International	JOBS	873.2	2711.6	1366.8	4951.6
	PAYROLL	\$48,114,851	\$169,731,529	\$54,960,934	\$272,807,243
	OUTPUT	\$100,547,348	\$714,400,955	\$160,502,174	\$975,450,477
South Bend Regional	JOBS	471.7	3231.7	2846.1	6549.5
	PAYROLL	\$21,880,862	\$263,232,362	\$110,204,721	\$395,317,945
	OUTPUT	\$66,031,256	\$1,331,948,464	\$321,463,504	\$1,719,443,224

If a business was reported as having used both a general aviation reliever airport in the same market as a commercial airport – the values associated with that business were attributed to the commercial airport in order to prevent double counting.



JASPER ENGINES AND TRANSMISSIONS EXCHANGE – JASPER, IN

Jasper Engines and Transmissions Exchange is a 70 year old national company, headquartered in southern Indiana with more than 1,800 associates who work in nearly 50 different locations around the country.

As a leading remanufacturer of gas and diesel engines, transmissions, and differentials, and supplier of parts for their fleet vehicles, Jasper Engines relies on the Huntingburg Airport to support its 5 corporate aircraft to bring up to 2,500 customers annually to its plants in Jasper, fly employees to its headquarters for hands-on leadership and training seminars and send associates around the country for client meetings and professional growth opportunities.



DETAILED RESULTS GENERAL AVIATION – NATIONAL AIRPORT

		ON-AIRPORT	AIRPORT USERS	MULTIPLIER	TOTAL
Gary/Chicago International	JOBS	239.5	0*	180.9	420.4
	PAYROLL	\$16,054,084	\$0*	\$6,824,159	\$22,878,243
	OUTPUT	\$48,085,762	\$0*	\$24,380,893	\$72,529,695

* No Surveys Returned

“Just recently Jasper Engines used its corporate aircraft to transport nearly 100 associates and executives to Chicago for a meeting about our corporate ESOP. We were able to fly in and out of Chicago on the same day, saving costs on hotel rooms, meals, and lost work days. As you can see, through the use of corporate aircraft we enabled our people to do their job, spend quality time with their families that same evening, and be back in the office refreshed and fully operational the next morning. That’s simply impossible to do without the use of corporate aircraft.” – Doug Bawel, Chairman & CEO

Jasper Engines isn’t the only corporation in Dubois County with a corporate jet. In fact, they are one of six major manufacturers/employers in Dubois County that owns/operates corporate aircraft. “We believe there is a direct correlation between the utilization of corporate aircraft for business and growth. Just look at the employment numbers as Dubois County consistently leads the state. Coincidence? We don’t think so.”





DETAILED RESULTS GENERAL AVIATION – REGIONAL AIRPORTS

		ON-AIRPORT	AIRPORT USERS	MULTIPLIER	TOTAL
Clark Regional (Jeffersonville)	JOBS	131.8	714.7	274.9	1121.4
	PAYROLL	\$7,003,408	\$44,813,833	\$10,413,280	\$62,230,571
	OUTPUT	\$17,643,036	\$184,501,067	\$32,451,587	\$234,595,690
Columbus Municipal (Columbus)	JOBS	46.5	2542.2	1304	3892.7
	PAYROLL	\$2,926,648	\$196,781,797	\$49,902,726	\$249,611,171
	OUTPUT	\$10,847,132	\$494,915,120	\$144,837,086	\$650,599,338
Dekalb County (Auburn)	JOBS	15.2	1038.7	338.3	1392.2
	PAYROLL	\$1,065,504	\$58,707,207	\$12,676,089	\$72,448,800
	OUTPUT	\$3,148,031	\$180,603,786	\$38,334,674	\$222,086,491
Delaware County Regional (Muncie)	JOBS	69.3	513.3	299.2	881.8
	PAYROLL	\$2,975,411	\$30,293,533	\$12,748,242	\$46,017,186
	OUTPUT	\$5,271,186	\$99,970,184	\$42,081,955	\$147,323,325
Eagle Creek Airpark (Indianapolis)	JOBS	70	2.3	39.3	111.6
	PAYROLL	\$3,982,773	\$161,900	\$1,804,311	\$5,948,984
	OUTPUT	\$6,671,096	\$410,155	\$4,769,634	\$11,850,885
Elkhart Municipal Airport (Elkhart)	JOBS	64.7	1035.3	419.9	1519.9
	PAYROLL	\$5,126,672	\$49,650,847	\$14,863,711	\$69,641,230
	OUTPUT	\$16,301,034	\$133,512,144	\$44,688,012	\$194,501,190
Goshen Municipal Airport (Goshen)	JOBS	38	27	28.2	93.2
	PAYROLL	\$1,961,874	\$1,174,852	\$1,143,418	\$4,280,144
	OUTPUT	\$4,420,513	\$4,168,156	\$3,193,131	\$11,781,800
Huntingburg Airport (Huntingburg)	JOBS	34	1721.9	993.3	2749.2
	PAYROLL	\$2,433,905	\$99,752,435	\$44,925,834	\$147,266,294
	OUTPUT	\$8,752,903	\$394,354,174	\$118,919,805	\$522,026,882
Indianapolis Executive Airport (Zionsville)	JOBS	118.2	1643.2	633.7	2395.1
	PAYROLL	\$6,649,597	\$96,280,275	\$21,333,586	\$124,263,458
	OUTPUT	\$16,950,961	\$351,617,277	\$61,553,422	\$430,121,660



		ON-AIRPORT	AIRPORT USERS	MULTIPLIER	TOTAL
Indianapolis Metropolitan Airport (Fishers)	JOBS	21.1	21.2	41.7	84
	PAYROLL	\$1,665,117	\$1,711,877	\$1,736,241	\$5,113,235
	OUTPUT	\$6,569,669	\$7,155,902	\$5,312,116	\$19,037,687
Indianapolis Regional Airport (Greenfield)	JOBS	36	7	20.5	63.5
	PAYROLL	\$1,849,929	\$362,488	\$610,453	\$2,822,870
	OUTPUT	\$3,265,733	\$1,154,589	\$1,750,042	\$6,170,364
Marion Municipal Airport (Marion)	JOBS	7.6	467.6	181.2	656.4
	PAYROLL	\$494,899	\$22,991,437	\$6,797,930	\$30,284,266
	OUTPUT	\$938,194	\$87,913,236	\$19,569,000	\$108,420,430
Monroe County Airport (Bloomington)	JOBS	38	931.5	697.5	1667
	PAYROLL	\$2,220,683	\$43,024,595	\$26,468,696	\$71,713,974
	OUTPUT	\$5,734,000	\$149,559,939	\$75,625,444	\$230,919,383
Porter County Regional (Valparaiso)	JOBS	31.6	47.2	35.3	114.1
	PAYROLL	\$2,144,972	\$2,695,112	\$1,258,858	\$6,098,942
	OUTPUT	\$6,464,939	\$7,260,864	\$3,537,006	\$17,262,809
Purdue University (Lafayette)	JOBS	51	232.7	98.7	382.4
	PAYROLL	\$3,483,411	\$14,207,247	\$3,390,913	\$21,081,571
	OUTPUT	\$6,456,894	\$17,201,186	\$9,980,567	\$33,638,647
Warsaw Municipal (Warsaw)	JOBS	14	2872.5	2066	4952.5
	PAYROLL	\$817,511	\$287,924,970	\$71,056,352	\$359,798,833
	OUTPUT	\$2,600,503	\$655,973,902	\$200,314,650	\$858,889,055





DETAILED RESULTS GENERAL AVIATION – LOCAL AIRPORTS

		ON-AIRPORT	AIRPORT USERS	MULTIPLIER	TOTAL
Anderson Municipal- Darlington Field (Anderson)	JOBS	42.5	3.3	27	72.8
	PAYROLL	\$2,625,628	\$195,576	\$913,808	\$3,735,012
	OUTPUT	\$6,016,762	\$341,309	\$2,599,954	\$8,958,025
Crawfordsville Municipal (Crawfordsville)	JOBS	37.7	143.5	74.2	255.4
	PAYROLL	\$3,100,929	\$7,384,936	\$2,649,071	\$13,134,936
	OUTPUT	\$10,484,751	\$60,039,795	\$9,794,933	\$80,319,479
Daviness County (Washington)	JOBS	8.5	54.3	9.8	72.6
	PAYROLL	\$518,600	\$1,053,427	\$272,047	\$1,844,074
	OUTPUT	\$1,442,737	\$1,833,504	\$893,876	\$4,170,117
Freeman Municipal (Seymour)	JOBS	26	441.3	214.4	681.7
	PAYROLL	\$1,141,841	\$31,460,883	\$6,959,281	\$39,562,005
	OUTPUT	\$3,349,417	\$168,592,724	\$21,630,885	\$193,573,026
Greensburg Municipal (Greensburg)	JOBS	27	64.9	107	198.9
	PAYROLL	\$467,534	\$6,302,015	\$4,420,183	\$11,189,732
	OUTPUT	\$1,081,757	\$71,684,705	\$15,868,164	\$88,634,626
Greenwood Municipal (Greenwood)	JOBS	19.5	39.6	46.1	105.2
	PAYROLL	\$1,220,112	\$3,184,274	\$1,462,947	\$5,867,333
	OUTPUT	\$3,497,260	\$19,378,579	\$4,416,369	\$27,292,208
Hendricks County- Gordon Graham Field (Plainfield)	JOBS	2.5	4.3	3.5	10.3
	PAYROLL	\$127,292	\$192,670	\$121,619	\$441,581
	OUTPUT	\$425,762	\$417,648	\$340,056	\$1,183,466
Huntington Municipal Airport (Huntington)	JOBS	8	75.5	37.5	121
	PAYROLL	\$332,645	\$4,480,461	\$1,269,595	\$6,082,701
	OUTPUT	\$839,612	\$14,718,744	\$3,859,535	\$19,417,891
Jasper County (Rensselaer)	JOBS	7	16.8	5.3	29.1
	PAYROLL	\$346,402	\$559,212	\$180,853	\$1,086,467
	OUTPUT	\$580,754	\$1,316,756	\$568,067	\$2,465,577

* Limited Surveys Returned

SWIFT FUELS

Indiana is home to some of the leading research and technology improvements in aviation. One such company, Swift Fuels, spawned in the Purdue Research Park is leading the way in the development of an unleaded / biofuel based replacement for traditional AvGas.



BELT TECH INDUSTRIAL - WASHINGTON, IN
Belt Tech Industrial, located in Washington, Indiana, has utilized the Daviess County Airport to support its business growth. The conveyor system sales and service company opened two branch offices in other states, approximately 200 miles away in opposite directions. Travel to one branch office required a full day of driving and travel between branches required multiple days. The stress of extended travel took its toll on Belt Tech executives, but the value of regular management oversight could not be denied. To alleviate these demands, Belt Tech purchased a small plane to allow executives to commute between the three

offices and return in the same day. With the newfound ease of commuting, Belt Tech expanded its market, relying heavily on the aircraft for business development. The Daviess County Airport has afforded them the opportunity to transport more staff to customers and vendors across the Midwest. While many businesses have struggled in today's economy, Belt Tech has grown substantially over the past few years, gaining revenue and increasing capital in the Washington community.





DETAILED RESULTS
GENERAL AVIATION – LOCAL AIRPORTS - CONTINUED

		ON-AIRPORT	AIRPORT USERS	MULTIPLIER	TOTAL
Kendallville Municipal (Kendallville)	JOBS	4	26	13.4	43.4
	PAYROLL	\$251,528	\$1,458,337	\$428,899	\$2,138,764
	OUTPUT	\$579,498	\$4,913,539	\$1,337,601	\$6,830,638
Kokomo Municipal (Kokomo)	JOBS	44.4	109.6	46.6	200.6
	PAYROLL	\$1,977,140	\$10,290,205	\$1,785,312	\$14,052,657
	OUTPUT	\$5,206,914	\$39,360,389	\$5,662,628	\$50,229,931
La Porte Municipal (La Porte)	JOBS	9.6	245.8	154.6	410
	PAYROLL	\$450,582	\$14,477,590	\$5,505,046	\$20,433,218
	OUTPUT	\$1,138,492	\$44,850,157	\$16,534,776	\$62,523,425
Madison Municipal (Madison)	JOBS	10	251	129.2	390.2
	PAYROLL	\$568,883	\$12,016,920	\$5,083,284	\$17,669,087
	OUTPUT	\$1,360,009	\$77,711,541	\$14,966,514	\$94,038,064
Michigan City Municipal (Michigan City)	JOBS	9.4	212.6	111.9	333.9
	PAYROLL	\$517,495	\$9,363,099	\$4,168,705	\$14,049,299
	OUTPUT	\$1,510,899	\$38,540,367	\$12,142,153	\$52,193,419
New Castle-Henry County Municipal (New Castle)	JOBS	3	2.3	3.2	8.5
	PAYROLL	\$169,159	\$119,772	\$109,007	\$397,938
	OUTPUT	\$679,474	\$313,888	\$315,874	\$1,309,236
North Vernon (North Vernon)	JOBS	10.1	347.5	68.7	426.3
	PAYROLL	\$507,872	\$16,525,027	\$2,490,961	\$19,523,860
	OUTPUT	\$1,205,853	\$43,807,071	\$7,287,475	\$52,300,399
Paoli Municipal (Paoli)	JOBS	11.3	2.5	6.5	20.3
	PAYROLL	\$764,731	\$236,978	\$213,349	\$1,215,058
	OUTPUT	\$2,204,802	\$369,308	\$672,205	\$3,246,315
Peru Municipal (Peru)	JOBS	3	0.5	1.4	4.9
	PAYROLL	\$194,707	\$42,115	\$47,799	\$284,621
	OUTPUT	\$311,615	\$74,434	\$144,527	\$530,576

		ON-AIRPORT	AIRPORT USERS	MULTIPLIER	TOTAL
Plymouth Municipal (Plymouth)	JOBS	16.8	128.3	154.9	300
	PAYROLL	\$1,967,780	\$11,370,477	\$5,538,749	\$18,877,006
	OUTPUT	\$6,051,515	\$77,868,813	\$18,801,442	\$102,721,770
Portland Municipal	JOBS	8	0*	2.9	10.9
	PAYROL	\$543,757	\$0*	\$88,293	\$632,050
	OUTPUT	\$1,040,333	\$0*	\$257,718	\$1,298,051
Putnam County (Greencastle)	JOBS	12.8	370.9	106.2	489.9
	PAYROLL	\$909,213	\$16,971,155	\$4,416,036	\$22,296,404
	OUTPUT	\$2,079,869	\$86,361,439	\$15,042,818	\$103,484,126
Richmond Municipal (Richmond)	JOBS	4	302.9	70.3	377.2
	PAYROLL	\$334,667	\$13,960,083	\$2,897,082	\$17,191,832
	OUTPUT	\$1,248,245	\$45,106,931	\$9,156,688	\$55,511,864
Salem Municipal (Salem)	JOBS	5.2	37.4	26.4	69
	PAYROLL	\$377,359	\$1,421,371	\$692,456	\$2,491,186
	OUTPUT	\$1,110,091	\$7,558,974	\$2,687,632	\$11,356,697

* No Surveys Returned

PURDUE | INDIANA STATE | VINCENNES | EMBRY-RIDDLE | IVY TECH

Colleges and universities in Indiana have a long tradition of supporting aviation through some of the best flight training, aviation technology and maintenance, and aviation management programs in the nation. Purdue University, Indiana State University, Vincennes University, Embry-Riddle, and Ivy Tech all provide programs that allow for students to get degrees in the aviation and aerospace industries.





DETAILED RESULTS
GENERAL AVIATION – LOCAL AIRPORTS - CONTINUED

		ON-AIRPORT	AIRPORT USERS	MULTIPLIER	TOTAL
Shelbyville Municipal (Shelbyville)	JOB S	3	0*	0.8	3.8
	PAYROLL	\$104,570	\$0*	\$25,731	\$130,301
	OUTPUT	\$201,904	\$0*	\$75,034	\$276,938
Smith Field (Fort Wayne)	JOB S	14.7	1.3	13.6	29.6
	PAYROLL	\$731,832	\$84,890	\$507,307	\$1,324,029
	OUTPUT	\$3,049,098	\$226,094	\$1,454,492	\$4,729,684
Starke County (Knox)	JOB S	2	0*	0.6	2.6
	PAYROLL	\$93,883	\$0*	\$28,411	\$122,294
	OUTPUT	\$165,731	\$0*	\$46,781	\$212,512
Sullivan County (Sullivan)	JOB S	3.9	0.5	1.7	6.1
	PAYROLL	\$268,783	\$31,602	\$47,186	\$347,571
	OUTPUT	\$623,189	\$60,389	\$157,807	\$841,385
Terre Haute International (Terre Haute)	JOB S	530.2	92.1	150.1	772.4
	PAYROLL	\$29,179,769	\$4,563,352	\$6,057,947	\$39,801,068
	OUTPUT	\$42,066,612	\$8,828,245	\$17,876,932	\$68,771,789
Tri-State Steuben County (Angola)	JOB S	6.2	2.9	2.1	11.2
	PAYROLL	\$164,497	\$113,650	\$75,042	\$353,189
	OUTPUT	\$350,097	\$273,538	\$218,258	\$841,893
Virgil I Grissom Municipal (Bedford)	JOB S	5	0*	2.1	7.1
	PAYROLL	\$230,045	\$0*	\$62,340	\$292,385
	OUTPUT	\$573,100	\$0*	\$183,180	\$756,280
Wabash Municipal (Wabash)	JOB S	3.5	31.1	16.3	50.9
	PAYROLL	\$224,625	\$1,777,579	\$449,764	\$2,451,968
	OUTPUT	\$360,544	\$4,587,841	\$1,413,283	\$6,361,668
White County (Monticello)	JOB S	21	170.3	93.9	285.2
	PAYROLL	\$1,054,265	\$16,166,128	\$3,234,467	\$20,454,860
	OUTPUT	\$4,040,782	\$93,329,578	\$10,761,877	\$108,132,237

* No Surveys Returned

FEDEX

The nation's second largest FedEx hub is located at Indianapolis International Airport. FedEx at IND employs more than 4,000 Hoosiers, handling an average of 500,000 packages daily, with upwards of 1,000 flights per month to domestic and international markets.

4,000+ JOBS
1,000 FLIGHTS PER MONTH
500 THOUSAND PACKAGES DAILY



METAL TECHNOLOGIES, INC – AUBURN, IN

Metal Technologies, Inc. (MTI) is an iron foundry with its headquarters in Auburn. Additionally, one of their manufacturing facilities is located in Auburn with the balance of manufacturing facilities in Ravenna and Three Rivers, Michigan. It employs more than 700 people with annual sales in excess of \$350 million.

“Metal Technologies would not be headquartered in Auburn, Indiana, without this first class airport here,” said Jeff Turner, the company’s senior vice president. Reaching its customers quickly throughout the eastern part of the United States is crucial to Metal Technologies’ business success. MTI flies customers to and from its facilities in the same day, avoiding overnight trips and long drives from larger commercial airports to smaller towns where customers are located. MTI also is able to fly customers to its facilities and have them back the same day for dinner or for an afternoon meeting.

MTI also believes its decision to locate in Auburn provides many financial benefits to Indiana and the

local community, including state and local income taxes, payroll taxes, property taxes and wages. The company is also a significant donor to local charities.

Turner cites challenges in getting prospective employees to relocate to a small town. While having a vibrant city nearby, such as Fort Wayne, is an important attraction he also notes that having efficient and well-run local airports are vital tools in every community’s economic development toolbox.

 DETAILED RESULTS
GENERAL AVIATION – BASIC AIRPORTS

		ON-AIRPORT	AIRPORT USERS	MULTIPLIER	TOTAL
Arens Field (Winamac)	JOBS	7.5	246.5	138.3	392.3
	PAYROLL	\$430,861	\$14,314,194	\$5,199,422	\$19,944,477
	OUTPUT	\$1,155,007	\$78,523,446	\$14,731,313	\$94,409,766
Delphi Municipal (Delphi)	JOBS	1	0.5	0.5	2
	PAYROLL	\$55,051	\$25,551	\$12,649	\$93,251
	OUTPUT	\$90,561	\$52,412	\$39,792	\$182,765
Frankfort Municipal (Frankfort)	JOBS	13.8	293.2	143.1	450.1
	PAYROLL	\$1,128,783	\$18,305,311	\$5,377,579	\$24,811,673
	OUTPUT	\$3,462,693	\$141,832,244	\$16,413,411	\$161,708,348
French Lick Municipal (French Lick)	JOBS	4	18	10	32
	PAYROLL	\$323,102	\$800,011	\$348,222	\$1,471,335
	OUTPUT	\$1,228,429	\$2,431,036	\$1,089,659	\$4,749,124
Fulton County (Rochester)	JOBS	11	57.7	23.4	92.1
	PAYROLL	\$563,895	\$2,137,053	\$773,551	\$3,474,499
	OUTPUT	\$1,730,507	\$7,031,006	\$2,159,124	\$10,920,637
Indianapolis Downtown Heliport (Indianapolis)	JOBS	34	0*	30.1	64.1
	PAYROLL	\$2,368,090	\$0*	\$1,362,699	\$3,730,789
	OUTPUT	\$5,065,759	\$0*	\$3,807,838	\$8,873,597
Kentland Municipal (Kentland)	JOBS	7.5	131.8	65	204.3
	PAYROLL	\$582,485	\$7,634,927	\$2,531,284	\$10,748,696
	OUTPUT	\$1,643,290	\$38,455,983	\$7,638,588	\$47,737,861
Logansport / Cass County (Logansport)	JOBS	8	328.1	108.3	444.4
	PAYROLL	\$554,818	\$13,847,921	\$3,530,188	\$17,932,927
	OUTPUT	\$1,921,747	\$69,146,393	\$11,523,344	\$82,591,484
Mettel Field (Connersville)	JOBS	21.2	146.2	104.2	271.6
	PAYROLL	\$2,748,322	\$8,078,980	\$3,522,312	\$14,349,614
	OUTPUT	\$8,400,227	\$40,601,220	\$10,997,572	\$59,999,019

* No Surveys Returned

		ON-AIRPORT	AIRPORT USERS	MULTIPLIER	TOTAL
Perry County Municipal (Tell City)	JOB	1	52.5	15.8	69.3
	PAYROLL	\$58,074	\$2,645,530	\$556,135	\$3,259,739
	OUTPUT	\$260,275	\$7,188,878	\$1,852,438	\$9,301,591
Randolph County (Winchester)	JOB	2.9	404.9	110.7	518.5
	PAYROLL	\$167,247	\$20,706,611	\$3,789,953	\$24,663,811
	OUTPUT	\$273,191	\$81,704,441	\$14,315,638	\$96,293,270

BENEFITS OF MILITARY AVIATION

Indiana has a long and proud tradition of supporting military aviation since the early days of World War II. While this study did not directly account for the significant impact of military aviation on the State of Indiana, military aviation continues to play a major role in the Indiana economy. Two major military aviation installations are based in Indiana:



FT. WAYNE AIR NATIONAL
GUARD (122nd Fighter Wing)

\$58 MILLION
IN ANNUAL ECONOMIC IMPACT

Source: Fort Wayne Chamber of
Commerce

GRISSOM AIR RESERVE BASE
(434th Air Refueling Wing)

\$130 MILLION
IN ANNUAL ECONOMIC IMPACT

Source: Grissom Air Reserve Base &
Miami County EDA

DETAILED RESULTS GENERAL AVIATION – UNCATEGORIZED

		ON-AIRPORT	AIRPORT USERS	MULTIPLIER	TOTAL
Boone County* (Lebanon)	JOBS	0	0	0	0
	PAYROLL	\$0	\$0	\$0	\$0
	OUTPUT	\$0	\$0	\$0	\$0
Brazil Municipal (Brazil)	JOBS	1.5	49.3	26	76.8
	PAYROLL	\$98,819	\$2,317,299	\$812,510	\$3,228,628
	OUTPUT	\$233,206	\$10,037,472	\$2,567,545	\$12,838,223
Clinton Municipal (Clinton)	JOBS	2.5	160	61.4	223.9
	PAYROLL	\$120,032	\$8,804,603	\$2,510,205	\$11,434,840
	OUTPUT	\$252,748	\$20,707,512	\$6,604,553	\$27,564,813
Griffith-Merrillville (Griffith)	JOBS	33.2	85.3	102.1	220.6
	PAYROLL	\$2,216,457	\$4,286,305	\$4,116,767	\$10,619,529
	OUTPUT	\$8,176,000	\$32,074,518	\$14,571,496	\$54,822,014
Sheridan Airport (Sheridan)	JOBS	13.4	167.4	336.6	517.4
	PAYROLL	\$576,043	\$7,885,260	\$18,292,477	\$26,753,780
	OUTPUT	\$1,790,911	\$161,649,682	\$50,105,189	\$213,545,782

* Did Not Report

INDIANA AIRPORTS SUPPORT HOOSIER MANUFACTURING JOBS The manufacturing industry across the state of Indiana depends on smaller general aviation airports located near their plants to provide just-in-time delivery of goods and equipment. Often, when machinery breaks down and a part is needed quickly, general aviation gets that part in town quickly and efficiently, significantly reducing downtime and saving hundreds of thousands of dollars.

In Decatur County the manufacturing needs of companies such as Kroger’s KB Specialty Food depend on the Greensburg – Decatur County airport as a crucial means of quickly receiving parts and essential deliveries. In Warsaw, three major orthopedic equipment manufacturers – Biomet, Depuy, and Zimmer – depend on the Warsaw airport to ship supplies, products and staff to clients around the globe. These three companies employ 3,500 workers in the Warsaw area, about 12 percent of the local workforce.



INDIANA AIRPORTS SUPPORT HOOSIER TOURISM

Indiana airports, both big and small, play a significant role in supporting tourism and visitor traffic across the state. The most recent case in point: The 2012 Super Bowl XLVI hosted by Indianapolis. During Super Bowl weekend, more than 40,000 additional visitors traveled through Indianapolis International Airport (IND), contributing approximately \$200 million in additional spending in the area. However, the story is much larger than the commercial airline traffic that arrived at IND. It includes the hundreds of aircraft that used approximately 20 local general aviation airports, from Bloomington to Lafayette and Muncie to Columbus and even as far south as French Lick, to get to the game and surrounding festivities.

The activities at airports across the state generated revenue for hotels, caterers, car services, and local governments.



AIRPORT CONSTRUCTION SUPPORTS HOOSIER JOBS

In 2011, nearly \$70M of Federal, State, and Local money was spent to maintain Indiana's airport infrastructure, supporting hundreds of jobs in the construction industry.

CONCLUSION

Indiana airports and the aviation and aerospace industry play a critical role in the Hoosier economy and directly support jobs across the state. The contribution they provide to the success and growth of local businesses should not be understated. The 69,000+ jobs and over \$14 billion in economic output is a conservative estimate – the airports' likely impact is far beyond that.

The testimonials included in this summary are just a sampling to the stories from those impacted by Indiana's airports. In many cases, those businesses would not have chosen to build in small communities if they didn't have access to a local airport. Those airports provide the connectivity to the global marketplace that is required in today's economy.

The future of Indiana's success in attracting businesses and industry relies heavily on the continued support and investment in the aviation infrastructure – large and small – across the state.





Conexus Indiana
111 Monument Circle, Suite 1800
Indianapolis, IN 46204



AVIATION ASSOCIATION OF INDIANA

Aviation Association of Indiana
135 N. Pennsylvania St., Suite 1175
Indianapolis, IN 46204