

MISSOURI

AIRPORT INVESTMENT STUDY



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Aviation Section**

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Technical Report

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Section 1:
Study Overview

1. Study Overview

State or Federal funding is typically awarded/allocated to public use airports based on how project “need” or “justification” relates to one of several factors:

- Safety
- Efficiency
- Capacity
- System “standards”
- Environmental impact mitigation
- Economic development

Projects that fall into the safety, efficiency, capacity, standards, or environmental categories typically stand on their own merit. Such projects typically fare better than economic development projects in terms of garnering funding from the Federal Aviation Administration (FAA). FAA has a process to prioritize investment in all Federally eligible airports. Within this project funding priority system, the FAA does not consider a project’s economic development potential.¹ Perhaps one reason economic development criteria are not included is that no convenient method exists to estimate a project’s potential economic return.

The Missouri Department of Transportation (MoDOT)-Aviation Section recognizes the importance of planning as a proactive approach to ensure aviation continues its role in the statewide transportation system. An update of the State Airport System Plan (SASP) provided insight to changes in Missouri’s airport system as well as the overall aviation industry. Further, the SASP included an extensive airport economic impact analysis that quantified the economic value of Missouri’s airports to the state. Specifically, the airport economic impact analysis evaluated the jobs, earnings and output associated with at-airport operations, off-airport impacts associated with visitors who arrive by air, and the multiplier impacts associated with aviation suppliers and the respending of earnings.

While the results of the airport economic impact analysis are extremely useful in illuminating the importance of Missouri’s aviation industry – and impressive with over 149,500 jobs attributable to aviation (directly or indirectly) – the previous work does not shed light on the potential return on investment (ROI) of capital improvements at different airports; specifically, the new jobs and output that such investments may generate at the state and local level. To more effectively plan and prioritize future airport investments in Missouri, MoDOT-Aviation Section commissioned this study to develop a framework to evaluate the potential ROI from airport investments.

The study’s purpose is to provide MoDOT with insight to the potential ROI for airport investments in terms of economic development. To do so, this study addresses two central

¹ The FAA does have a Benefit/Cost (B/C) methodology that evaluates operational and time savings benefits, as addressed in Section 2.3. However, this B/C methodology excludes economic development impacts.

objectives: first, an approach to evaluate airport investments; and secondly, an investment evaluation of five diverse general aviation airports. Review of past airport economic evaluation approaches provides a framework to assess the potential economic returns, while at the same time addressing the difficult issues that complicate the analysis.

Faced with increasing demand for limited financial resources, state aviation administrators desire a means to prioritize, or at least evaluate, investments between airports based on potential economic impact. A common question that arises is: *“What is the return on investment?”* While this question is straightforward, the answer is complicated due to how one defines and measures impacts, and one’s perspective. This study evaluates economic development impacts resulting from capital investment at an airport, measured in terms of jobs, earnings and output. In doing so, the study is primarily concerned with how off-airport users benefit from the investment in terms of expanded business activity.

This perspective varies greatly from typical airport economic impact studies that measure jobs and expenditures at an airport associated with visitors who fly into/out of an airport, and the related multiplier impacts. The intent of this study is to assess how airport investments might best help Missouri’s overall economy (i.e., the businesses that ship time-sensitive cargo and/or fly management and technical personnel via general aviation airports).

This analysis primarily concentrates on general aviation airports because commercial passenger airports typically obtain funding directly from the FAA, can generate funds through Passenger Facility Charges (PFCs) and other sources not available to general aviation airports, and typically enjoy a significantly greater degree of financial autonomy than do general aviation airports.

Section 2:
Airport Impact Evaluation Framework

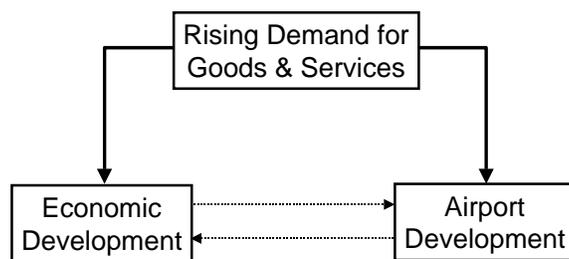
2. Airport Impact Evaluation Framework

This section presents background discussion on the role of airports in economic development and methods of evaluating airport investments from an economic development perspective. The review begins with a discussion of how the rising demand for goods and services generates economic development and the need for airports. Various prioritization techniques used to evaluate the investments between airports are then presented in Section 2.2. The benefit/cost approach used by the FAA in their economic evaluation of investment decisions is then discussed in Section 2.3.

2.1. Airports and Regional Economic Development

As regional business markets become more national and even global in scale, airports are increasingly seen as catalysts for local economic development. The ability of airports to retain and attract new business (and the associated jobs) is often used to justify public investment. However, the rationale that one can stimulate regional economic development by simply investing in airport infrastructure is misleading because it overlooks a basic economic principle. While transportation is essential in the operation of a market economy, airport infrastructure does not stimulate local development, nor does local development stimulate airport investment. Rather, both are stimulated by regional increases in demand for goods and services. Essentially, *rising demand for goods and services* stimulates economic development and airport infrastructure investment. Therefore, airport investment must be seen as a facilitator of growth, *not* the origin of growth. The inter-dependent relationships between goods and services, economic development, and airport development are illustrated in **Exhibit 2-1**.

Exhibit 2-1
Airports and Economic Development
Missouri Airport Investment Study



Source: Wilbur Smith Associates

2.1.1. Economic Growth Components

The ability of a region to create economic growth (i.e., stimulate demand for goods and services) is based on three components: population and employment growth, capital investment, and technological progress.² These components are described in greater detail below.

Population and Employment Growth – Increases in the population and labor force lead to economic development and growth. Population growth increases demand for goods and services, which further stimulates economic expansion and capital investments in industrial, economic, and social infrastructure. Labor force changes increase manpower availability to existing businesses and attract new commercial ventures. A large, productive labor force provides a base to sustain consumption of goods and services.

Capital Investment – Expanded regional output is also created by capital investments in manufacturing facilities, machinery, equipment, and materials. These productive investments are supplemented by investments in social and economic infrastructure, transportation, electricity, water, sanitation, and communications, etc., all of which facilitate and integrate economic activity. Similarly, investment in human resources, such as education and infrastructure, improve the quality and productivity of labor resources.

Technological Progress – New and improved methods of accomplishing traditional tasks such as growing crops, manufacturing products, etc., further stimulate demand for goods and services. The introduction of innovative techniques and processes results in higher total regional output and productivity. These output and productivity improvements further stimulate the consumption of goods and services. Local educational institutions help to facilitate this process through technical training and education.

2.1.2. Quantifiable Variables

With the understanding that airport investments facilitate, but typically are not the origin of economic growth, airport investment prioritization from an economic perspective can be addressed. The three economic growth components described above provide a framework to assess the future role of airports in their regional economies. However, the ability to identify, collect, and quantify data for these three components ranges from straightforward and easy, to indirect and difficult.

While historical population and employment data at the county level are easily obtained, employment forecast data is typically elusive and/or circumspect. Moreover, quantification of capital investment and technological progress is even more challenging. Past review of data sources revealed that capital investment data at county levels requires considerable effort, because no central source tracks both private and public capital flows. However, other

² Michael P. Todaro, “Economic Development” (Longman, White Plains, NY, 1994) pp. 100-105.

measures can serve as proxies for existing capital stock. Further, the concept of technological progress is abstract and very difficult to quantify, however, one can capture quantifiable variables in which technological progress is a by-product, such as the existence of higher educational institutions.

For these reasons, the following five variables have been used in past studies to evaluate the relationship between airports and economic growth.

- Population and Employment – Population and labor force projections gauge the expected change in demand for goods and services within airport service areas. The greater the absolute level and percent change in a region's population and employment base, the greater the demand on the region's transportation infrastructure. To simplify the analysis, total employment can be dropped as a direct variable since it generally exhibits a positive (albeit lagged) relationship with population changes and detailed long-term projections typically are not available on a county level. Therefore, population projections are considered a better way to measure the expected changes in economic development and growth within a region.
- Industrial Park Activity – Significant industrial/business park activity in a region creates demand on the existing transportation infrastructure. Local airports support this activity through commercial and general aviation air passenger and air cargo services. Therefore, local industrial parks serve as a proxy for identifying a region's industrial/commercial density and capital investment levels. Regional industrial park employment and acreage are typically proportional to aggregate industrial activity, and provide a means by which to identify changes in the demand for goods and services.
- Highway Infrastructure – As part of the economic infrastructure, highway systems provide intermodal connectivity with local airports. An airport with convenient highway access is more capable of contributing to the economic development of its service area. Therefore, the nearer an airport to quality highways, the greater the transportation efficiencies that accrue to current users and the more attractive the region is to potential commercial interests.
- Educational Infrastructure – The greater the ability of a region to supply and train a quality labor force, the greater the region's opportunities for business and commercial expansion. An airport service area with multiple universities, colleges, and technical/trade facilities can provide a continuing stream of educational services to train and upgrade the labor force needed to meet the demands of local businesses. Further, a dense educational infrastructure will promote innovative management and process technologies, adding to the economic growth opportunities.
- Airport Competition – As a result of the spatial distribution of airports, markets or service areas often overlap. Service areas shared by multiple airports increase the complexity of the investment prioritization process. For example, high airport redundancy in a

region with low population density suggests low return on investment in terms of jobs, output, taxes, etc.

2.2. Prioritization Screening Techniques

The decision of how to best screen and prioritize investments in a state or regional aviation system begins with an assessment of different screening and evaluation approaches. A wide range of benefits and drawbacks are inherent within all approaches. Qualitative models require little data and are easily managed, but are subjective and influenced by bias and opinion. Quantitative models are more objective, but require more data input and related data collection, and require a greater processing effort. The range of airport prioritization approaches includes the following:

- Basic Sufficiency Ratings
- Economic Feasibility (Benefit/Cost)
- Cost Effectiveness
- Weighted Factors
- Filter Analysis

These approaches and their appropriateness for assessing an airport's potential impact on its economy are discussed below. It is important to note that some approaches are more applicable for a project analysis at a single airport, while others work better for a system analysis of many airports.

- Basic Sufficiency Ratings – The basic sufficiency ratings method is a simple evaluation tool that uses a subjective analysis to measure airport data including runway characteristics (e.g., length, width, strength), safety, and activity (e.g., aircraft operations, based aircraft). The subjective nature of this method enables basic economic and environmental factors to be easily incorporated. For example, “*Do businesses use the airport? Yes/No.*” Typically, expansion and enhancement costs are excluded in sufficiency ratings.
- Economic Feasibility – The economic feasibility approach, often referred to as benefit/cost, uses a quantitative analysis where comparative values are expressed in dollar values, such as Net Present Value (NPV), Benefit/Cost (B/C) Ratios, and Internal Rates of Return (IRR). A potential drawback with these measures is that they typically do not consider important social, environmental, and indirect economic impacts. The detailed nature of such analyses is better suited for individual project evaluations of different alternatives than for the more general screening of various airports within an aviation system. The FAA increasingly requires B/C analyses for projects over \$5 million, as discussed later.

- Cost Effectiveness – Unlike economic feasibility, the cost-effectiveness approach does not require both costs and benefits to be expressed in monetary terms. Rather, it is a ratio of an investment's effectiveness to its cost (i.e., runway extension/increased operations). Individual projects can be evaluated according to quantification of travel and timesaving, accidents, user costs, maintenance costs, etc. Such studies can take a "least-cost" or "constant" cost approach. In the least-cost approach, the perceived benefits between alternatives is the same, the objective is to determine which alternative yields the lowest cost. Conversely, in the constant cost the objective is to determine which alternative yields the greatest benefits.
- Weighted Factors – Similar to the basic sufficiency ratings, the weighted factors approach is a more detailed and complex approach that involves multiplying a wide range of impact values by a variable. The total impact value, therefore, is highly dependent on the weights assigned to the various components.
- Filter Analyses – Filter analyses are based on the assumption that investment impacts often cannot be measured precisely and/or that their inaccuracy can be quite large. Therefore, a filter analysis approach begins by evaluating all candidates (i.e., airports) under the most important criterion (i.e., population). Based on the evaluation of this single, most important criterion, distinct groups or clusters should emerge. Those candidates that register in the highest scoring group (i.e., high population) are then evaluated separately under the next most important criterion. In effect, the filter analysis applies different screens to separate airports from one another.
- Others – Other screening/prioritization approaches vary between high subjectivity/low data requirements to low subjectivity/high data requirements. Of these, an approach that is often incorporated into other analyses is the Delphi Method, in which group discussion is used to decide a course of action or generate subjective criteria. For example, a Delphi Method could be used by a group of researchers to decide on which factors to use in an evaluation and how to assign various weights.

Since the intent of this study is to determine the ROI, an "Economic Feasibility" oriented approach is adopted. The following subsection addresses the FAA approach regarding such analyses and its limitations regarding the evaluation of economic development impacts.

2.3. FAA Benefit/Cost Approach

The FAA economic perspective on airport investment decisions is presented in the *"Economic Analysis of Investment and Regulatory Decisions – Revised Guide"*, January 1998. In it, the FAA acknowledges that "economic analysis" is a broad term that encompasses a wide range of topics that include economy-wide analysis, regional studies, market-structure investigations and specific decision analysis. Of these, the FAA is most concerned with specific decision analyses that address whether an objective is worth achieving and which alternative is best. To do so, the FAA uses two procedures. The first, cost effectiveness, assumes that the objective (i.e.

airport investment) is worth achieving. The second, preferred alternative, answers both questions through a benefit/cost (B/C) analysis.³

The nuances in these approaches is significant from the perspective of this analysis and its intended use. First, the FAA requires favorable B/C analyses for economically justified projects over \$5.0 million. The benefits basically reflect potential cost savings of aviation users, customers, or companies quantified in terms of personal time and operating cost (i.e., aircraft, control towers, etc.). Such an analysis requires a significant level of input and evaluation. It is important to note a B/C analysis was done for Lee's Summit Municipal in 2002.⁴ In this prior study, the transportation benefits reflect the time and cost savings of using a new airport versus the existing airport and a best alternative (Kansas City International).

Second, the FAA typically excludes off-airport developmental benefits from its analysis because of an underlying assumption that the new jobs are typically attracted away from another facility. However, instances are cited in which economic development impacts may be addressed in an FAA economic investment analysis of a new airport.⁵ If a region is particularly suited to producing a good or service at a lower cost, the reduction in delivered cost combined with the value of additional consumption associated with the lower production cost could be included.

In general, the FAA approach appears oriented towards the evaluation of commercial service airports with a significant portion of the benefit methodology dedicated towards quantification and valuation of personal injury, congestion delays and flight disruptions. However, this study evaluates general aviation airports, where such benefits are typically minor. Lastly, the FAA specifically notes that any construction or equipment impacts associated with a capital improvement project are excluded.

2.4. Measuring Value-Added Impacts

Given the inherent logic that airport development facilitates a region's ability to accommodate a rising demand for goods and services, combined with the lack of an effective manner to measure the economic development impacts associated with airport development, (especially at general aviation airports), presents a dilemma for aviation administrators on how best to evaluate an airport project's economic return on investment. Nonetheless, industry sources, such as the National Business Aircraft Association (NBAA) and General Aviation Manufacturers Association (GAMA), as well as other researchers continue to evaluate the issue from different

³ "Economic Analysis of Investment and Regulatory Decisions – Revised Guide, 1998"; U.S. Department of Commerce, Federal Aviation Administration.

⁴ "Lee's Summit Municipal Airport Phase – FAA Benefit-Cost Analysis", April 2002; Bucher, Willis & Ratcliff Corp.

⁵ It is unclear whether such instances also apply to existing airports, although an argument could be made that such benefits should also apply.

perspectives. The following discussion reviews such industry research and specific findings from the Missouri SASP that addressed the measurement of value-added impacts.

2.4.1. Aviation-Dependent Growth Industries

Many of the nation's leading employers that use general aviation as a business tool are members of the NBAA. The NBAA's Business Aviation Fact Book 2004 indicates that approximately 75% of all businesses included in the Fortune 500 operate general aviation aircraft. In addition, 92 of the Fortune 100 companies operate general aviation aircraft. A detailed analysis conducted for NBAA in 2004 also indicated that among the Fortune 500 there were more than twice as many companies operating general aviation aircraft as non-operators.

Business use of general aviation aircraft ranges from small single-engine aircraft rental to multiple aircraft corporate fleets supported by dedicated flight crews and mechanics. The use of general aviation aircraft enables employers to efficiently transport personnel and air cargo. Businesses use general aviation aircraft to link multiple office locations and to reach existing and potential customers. Small to mid-size company use of business aircraft escalated during the emergence of various chartering, leasing, time-sharing, interchange agreements, partnerships, and management contracts. Fractional ownership arrangements have also experienced recent rapid growth. The NBAA estimated that between 2000 and 2004 the number of companies and individuals indicating fractional ownership increased 62%, from 3,834 to 6,217.

Regardless of who owns the aircraft or what type of aircraft are flown, businesses increasingly choose to use general aviation because it provides safe, efficient, flexible, and reliable transport. Of all the benefits provided to business by general aviation, flexibility is the highest ranked factor by all businesses using general aviation aircraft. Many reasons exist for why businesses use general aviation in their day-to-day operation; NBAA identified the following seven key factors:

1. Employee Time Savings
2. Increased Productivity
3. Minimization of Non-business Hours Away from Home
4. Assurance of Industrial Security
5. Maximization of Personal Safety and Peace of Mind
6. More Control of Business Travel Scheduling
7. Better Facilitation of the Entrepreneurial Spirit

The use of general aviation as a business tool adds to productivity and to the bottom line. According to an NBAA survey of key Forbes and Fortune 500 companies, those businesses that use general aviation aircraft routinely and significantly outperform businesses that do not. Performance indicators such as annual sales, number of employees, value of assets, and annual income are significantly higher for employers using general aviation aircraft.

2.4.2. Value-Added Impacts in Missouri

Considering the number and variety of businesses in Missouri, it is impossible to quantify the value-added benefit that Missouri businesses derive from their use of the airport system. It is possible, however, to obtain perspective on the importance of aviation to the business community through surveys. As part of the SASP, approximately 4,000 businesses (of which 600 responded) throughout the state were surveyed to assess their dependence on aviation. The businesses were selected from manufacturing, transportation, telecommunications, engineering/consulting, and utility sectors. The targeted sectors represent those with greater propensities to use scheduled commercial airline service and general aviation. The following summaries provide additional perspective on the value of aviation, especially general aviation service.

Location Factor Ranking – The Missouri business survey asked respondents to rank the importance of various factors that they would consider if they contemplated relocating or expanding their business. Overall, the availability of an airport with scheduled commercial airline service ranked 6th and proximity to general aviation facilities ranked 10th out of the 14 factors considered. Highway access, labor supply, and availability of a trained workforce ranked first, second, and third, respectively. The rankings of the location factors included in the survey are as follows:

- | | |
|--|---------------------------------------|
| 1. Convenient highway access | 8. Urban business district |
| 2. Available labor supply | 9. Raw Materials |
| 3. Available trained workforce | 10. A general aviation airport |
| 4. Tax incentives | 11. Natural Resources |
| 5. Proximity of suppliers | 12. Water Transportation Facilities |
| 6. A commercial service airport | 13. Historic location |
| 7. Academic or cultural centers | 14. Rail transportation facilities |

Business Use of General Aviation Services – Survey results indicate that many businesses depend on Missouri's system of airports on a daily basis. Without access to general aviation and commercial service airports, businesses indicated a need to cut employment or possibly relocate to other states.

- 14.5% of survey respondents indicate that their company owns, has fractional ownership, leases, or charters general aviation aircraft.
- 34.6% of respondents indicate their customers or suppliers use general aviation to visit the surveyed company.

Dependence on Aviation Services – Respondents indicated that on average 5.3% of their gross sales are dependent on aviation, either commercial service or general aviation. Of the 600 respondents this represented an estimated \$210 million of approximately \$4.0 billion in sales.

Section 3:
Missouri Investment Study Approach

3. Missouri Investment Study Approach

The airport impact evaluation framework discussed in the previous section provides a backdrop from which to develop an approach for the evaluation of future airport investments from the Missouri DOT’s perspective, and to evaluate the economic development impact of recent and proposed capital investment at five case study airports in Missouri. This section begins with a brief description of the capital investment period and locale of the five study airports. The second subsection frames the critical issues that underlie the analysis. The third subsection discusses the location factors and project types, and the final subsection outlines the approach used to assess the five case study airports.

3.1. Study Airports

This study evaluated five airports – four existing and one planned, in rural and urban locations across the state. In addition, the analysis addressed airports that have already received significant recent funding as well as those that are undergoing significant capital improvement projects. For this reason, the economic assessment comprises both a historical and future perspective. This contextual background is summarized below in **Exhibit 3-1**.

Exhibit 3-1
Airport Location and Investment Period
 Missouri Airport Investment Study

| | Location | |
|-------------------|-----------------------|--------------|
| | Location | |
| Past | Monett | Creve Coeur |
| Future/New | Eldon Branson West | Lee's Summit |

Source: Wilbur Smith Associates

3.2. Critical Issues

Three critical issues underline the project approach, as outlined below:

1. Capital improvements at general aviation airports typically do not lead to direct economic growth; rather rising demand for goods and services creates the potential for economic growth, which investment at general aviation airport can facilitate.
2. Only certain industries directly use/depend on general aviation airports.
3. The economy in *each* airport’s service region affects the potential need for general aviation facilities.

These three issues provide the foundation for the study approach which is discussed later.

3.3. Project Improvement Factors

In addition to the critical issues discussed previously it is important to distinguish whether economic development impacts are anticipated to occur at or off the airport. Further, airport projects tend to have significantly different effects on different regions.

3.3.1. Development Impact Location

Economic development associated with airport investment can occur either at the airport or off the airport. Identifying the difference is useful in understanding how different airport improvement projects affect potential growth or attraction of an industry.

On-Site Aviation Business – Projects that help attract a major aviation service facility, such as aircraft repair or manufacturing, are the most visible in terms of economic development yields and are typically quantified in a straightforward manner.

Off-Airport Businesses – Non-aviation business also depend on airports to support their daily business activities. Corporate aircraft based at an airport often accommodate sales forces that travel each week. Identifying an actual link between a project at an airport and potential economic benefits for non-aviation businesses in the community is very difficult. For example, if new hangar construction enables a company to base its aircraft at the airport, relocate to the community, and bring 50 new jobs, an obvious economic return from the investment exists. However, the supply of appropriate labor skills and rates, as well as taxes and road access also play a critical role in the decision process. Nonetheless, three areas of potential benefit exist in which off-airport business might expand or develop due, in part, to airport improvements:

- *Air Cargo* – Some projects facilitate the movement of air freight and air cargo. Non-aviation businesses often depend on airports that accommodate express and cargo carriers. In addition, projects related to air cargo transport often increase on and off-airport employment levels.
- *Tourism* – As demonstrated by the economic impact analysis that was completed as part of the SASP, spending by visitors who arrive in Missouri via scheduled commercial service or general aviation aircraft contribute significantly to the State's economy. Some projects enable airports to better support tourism. Such benefits typically occur off-airport and relate to visitor spending at hotels/motels, restaurants, and attractions throughout the State. Projects that increase an airport's ability to accommodate visitors/tourism, have the potential to provide positive economic return.
- *Personnel Transport* – As detailed by the NBAA and through the Missouri business survey, major corporations increasingly rely on aviation to transport key personnel due to employee time savings, increased productivity, scheduling control, etc.

3.3.2. Project Types

Each year, public-use airport sponsors submit projects for consideration for both state and Federal funding. Basic project categories include:

- Aprons
- Lighting/Navigational Aids (NAVAID)
- Runways
- Taxiways
- Hangars/Buildings
- General Aviation Terminals
- Aircraft Rescue & Fire Fighting (ARFF) Facilities
- Ground Access
- New Airports
- Others

Exhibit 3-2 provides a qualitative assessment of the relative propensity of various project categories to help facilitate economic growth. This qualitative assessment reflects Consultant experience at general aviation airports across the country and review of various studies and publications; unfortunately, no data exists that quantitatively correlates airport project investment with regional output. Impact types are addressed by on- versus off-airport. For example, an airport may already have sufficient apron facilities to accommodate off-airport users, but may require a new apron to attract a new FBO (i.e. Aviation Services); in such a case, the new apron would have little affect on a business’s ability to transport key personnel.⁶

Exhibit 3-2
Airport Related Economic Development by Impact Location and Project Type
 Missouri Airport Investment Study

| Project Types | On-Airport | | Off-Airport | | Tourism |
|-------------------|-------------------|----------------------|---------------------------------|-------|---------|
| | Aviation Services | Air Cargo Operations | Bus./Professional Use Personnel | Cargo | |
| Runways | ○ | ■ | ■ | ○ | ○ |
| Taxiways | △ | ○ | △ | △ | △ |
| Lighting/NAVAIDs | △ | ○ | ○ | △ | ○ |
| Aprons | ■ | ○ | △ | △ | ○ |
| Hangars/Buildings | ○ | ○ | △ | ○ | △ |
| GA Terminals | △ | △ | ○ | △ | ○ |
| ARFF Facilities | △ | △ | △ | △ | △ |
| Ground Access | △ | ○ | △ | △ | △ |

△Low; ○Medium; ■High

Source: Wilbur Smith Associates

This does not “guarantee” that a project will produce economic benefits following development or implementation. Rather, it simply identifies those project categories that are more likely to accommodate a region’s rising demand for goods and services. Further, projects interact with the economy in different ways at different airports, so the same two projects will yield different economic return at different airports. Lastly, airport improvements often require a master plan,

⁶ It is important to note that each airport has a unique set of facilities and demand.

which ensures that all of the key needs are addressed – for example an appropriate NAVAID system is required in addition to the longer runway to accommodate larger or more sophisticated corporate aircraft and/or jets on routine basis. The various project types are discussed below.

Runways – In general, runway projects typically have the highest potential to provide positive economic return. Runway extension projects can open the airport to larger aircraft, which can positively affect the fleet mix resulting in expansion of on-airport businesses as well as facilitating aviation use by off-airport firms that transport cargo and personnel, and recreational use by visitors. In doing so, runway extension projects can help retain existing businesses or attract a new employer to an airport’s service area.

Taxiways – Taxiway projects, in and of themselves, appear to have a rather limited potential for providing economic return, since they seldom create additional on-site employment, and do not affect fleet mix. It is possible that some tourism or air cargo impacts could result from taxiway projects, but it is anticipated that such return would be marginal. It is important to reiterate, however, that many taxiway projects are needed/justified from a safety and capacity standpoint. As a result, even though taxiways have a lower propensity for creating economic return, they are often important for other reasons considered by FAA/MoDOT.

Lighting and NAVAIDs – Lighting and NAVAID projects have a greater likelihood to generate economic return than taxiways, since they support general aviation operations, specifically larger aircraft. However, there is little likelihood that investment in lighting and NAVAID projects in and of themselves, results in additional on-site employment. Rather, lighting and NAVAID projects have a greater likelihood of benefiting non-aviation businesses whose increased hours of operating better enable them to serve their customers or transport employees and/or cargo.

Aircraft Parking Aprons – A new/expanded apron area could support additional on-site employment, if the apron was developed to support a new FBO or on-site air cargo operations. Apron area improvements also support increased tourism by providing new or expanded parking for larger, transient or visiting aircraft. However, it is difficult to demonstrate ways in which expanding or building new apron areas would generate increased economic activity of off-airport, non-aviation businesses, since it has little potential for changing an airport’s fleet mix.

Hangars/Buildings – Several types of airport-related projects fit into the “building” category. Depending upon the type of building a wide range exists for potential economic return. Generally speaking, however, hangar projects exhibit a lower propensity to generate notable economic ROI (in terms of new jobs and/or economic activity).⁷ Conversely, building investments can generate economic return in both on-site aviation-related and off-site non-aviation business categories. Generally, however, such investments will not attract corporate development, rather such firms typically construct their own facilities.

⁷ However, it is important to note that hangar projects often produce a positive financial return for the airport operator.

General Aviation Terminals – Generally a high correlation exists between investment in passenger terminal facilities at commercial service airports and economic return. However, such a strong correlation does not exist at general aviation airports. Nonetheless, a connection does exist between improved/new terminal facilities and economic return related to off-airport tourism. Terminal facilities can, however, generate some minor on-site employment and make a facility more attractive to potential business users.

ARFF Facilities – A connection exists between ARFF facilities and an airport's ability to support scheduled commercial service aircraft operations which affects tourism. At general aviation airports, however, ARFF facilities are not seen as an economic driver, rather they are seen as a safety improvement.

Ground Access – Ground access improvements are not seen as a major factor in generating economic development unless the general aviation airport's growth is constrained by unique circumstances, such as delivery trucks accessibility through a residential neighborhood or via unimproved roads.

In summary, runway extensions that enable an airport to accommodate larger aircraft and/or jets typically have the greatest likelihood to generate economic development. However, a coherent overall plan that ensures sufficient taxiway, NAVAIDs, apron areas, etc, is essential to ensure that the airport investments succeed in maximizing regional economic impacts.

3.4. Impact Approach

The critical issues and development factors discussed above provide the basis for the following study approach:

1. Airport Infrastructure – Identify airport constraints to business expansion/location decisions.
2. Regional Economy – Evaluate business environment of airport service area and assess industries with development opportunities.
3. Economic Development Potential – Estimate type and magnitude of potential economic impacts.

3.4.1. Airport Infrastructure

The relative propensity of airport improvement projects to positively affect the community varies by airport, project type and community, as discussed earlier. To understand how airport improvements may affect the region's rising demand for goods and services requires review of airport master plans and airport visits. Discussions with the airport manager/owner/operator, as well as key local business and community leaders about local airport users needs and constraints provides an understanding of an airport's current role and future potential in the local economy. Through this process, it is possible to obtain a sense for whether the airport's projects will accommodate and support local business development efforts and generate

economic development. For the case studies in this evaluation, historical and/or proposed capital improvement projects are used. These projects incorporated extensive discussions, visits and planning in their development prior to this study.

3.4.2. Regional Economy

Development opportunities can occur on or off-airport, as discussed previously. Usually, the on-airport development opportunities are clear cut: an FBO, aircraft service or corporate flight department will locate (or expand) at a specific facility if runway improvements are made. The more difficult analysis concerns gauging the dependence of off-airport businesses that use the airport such as “Will runway improvements generate local economic development?” To address this concern the following framework is proposed:

- Identify industries with national/international markets and growth potential
 - External operations, suppliers, buyers, etc.
 - Freight & passenger types best accommodated by air transport
- Identify sites & attractions that appeal to external visitors
 - Natural, historical, recreational
 - Government, university, medical, convention
- Identify factors that Accommodate Economic Development
 - Highway
 - Land and infrastructure
 - Demographics – population and sector employment (level & growth)

Off-airport industry sectors identified as those most likely to use and potentially benefit from airport improvements include tourism, business, manufacturing and institutional. Manufacturing and business service reflect industries with national/international markets and growth potential. Tourism and institutions reflect industries that may appeal to external visitors. The specific Standard Industrial Classification (SIC) codes associated with these four sectors are color-coded in **Exhibit 3-3**.

Exhibit 3-3
Airport-User Industries
 Missouri Airport Investment Study

| SIC | Description | SIC | Description |
|-----|------------------------------------|-----|-----------------------------------|
| 7 | Agricultural services | 48 | Communications |
| 8 | Forestry | 49 | Electric, gas & sanitary services |
| 9 | Fishing | 50 | Wholesale trade-durable goods |
| 10 | Metal mining | 51 | Wholesale trade – nondurables |
| 12 | Coal mining | 52 | Bldg materials & garden supplies |
| 13 | Oil and gas extraction | 53 | General merchandise |
| 14 | Nonmetallic minerals, exc. Fuels | 54 | Foods stores |
| 15 | General contractors | 55 | Auto dealers & service stations |
| 16 | Heavy construction | 56 | Apparel and accessory stores |
| 17 | Special trade contractors | 57 | Furniture and home stores |
| 20 | Food and kindred products | 58 | Eating and drinking estabs |
| 21 | Tobacco products | 59 | Miscellaneous retail |
| 22 | Textile mill products | 60 | Depository institutions |
| 23 | Apparel & other textile products | 61 | Nondepository institutions |
| 24 | Lumber and wood products | 62 | Security & commodity brokers |
| 25 | Furniture and fixtures | 63 | Insurance carriers |
| 26 | Paper and allied products | 64 | Insurance agents, services |
| 27 | Printing and publishing | 65 | Real estate |
| 28 | Chemicals and allied products | 66 | Holding, investment offices |
| 29 | Petroleum and coal products | 70 | Hotels and other lodging |
| 30 | Rubber & misc. plastics products | 72 | Personal services |
| 31 | Leather and leather products | 73 | Business services |
| 32 | Stone, Clay, and glass products | 75 | Auto repair, services, parking |
| 33 | Primary metal industries | 76 | Miscellaneous repair services |
| 34 | Fabricated metal products | 78 | Motion pictures |
| 35 | Industrial machinery and equip. | 79 | Amusements & recreation |
| 36 | Electronic & other electric equip. | 80 | Health services |
| 37 | Transportation equipment | 81 | Legal services |
| 38 | Instruments & related products | 82 | Educational services |
| 39 | Mis. manufacturing industries | 83 | Social services |
| 41 | Local & interurban pass. Transit | 84 | Museums, botanical, zoos |
| 42 | Trucking and warehousing | 86 | Membership organizations |
| 44 | Water transportation | 87 | Engineering & management |
| 45 | Transportation by air | 89 | Services, other |
| 46 | Pipelines, except natural gas | 99 | Unclassified establishments |
| 47 | Transportation services | | |

| | |
|--|--|
| Manufacturing | Tourism |
| Institutions | Business Services |

Source: Wilbur Smith Associates

All manufacturing sectors were included because they often use general aviation airports to transport key personnel, parts, and materials and/or goods. Institutions considered include hospitals and universities. Business services include legal, engineering and management, and other services. Tourism industries include hotels and other lodging, and amusements.

In addition to the codes highlighted, arguments could be made that others could be included, such as banks (SIC 60) since they often transport cancelled checks via air. However, extending a runway to accommodate cancelled check transport seems impractical because a major check clearing facility would typically be located in a metropolitan area that could use commercial service aircraft to transport cancelled checks in addition to general aviation aircraft. The expanding development and use of improved technologies will eventually make this practice obsolete.

The highlighted aviation-user sectors are not a rigid, fixed set. Further, other sectors may be identified during the individual airport evaluations. The highlighted sectors provide a starting point from which to evaluate the magnitude of potential off-airport business users in a region. Given this approach, three sources were used to assess the regional economies for each airport and to identify current users.

1. **EDGE Model** – The Economic Development and Growth Evaluation software (EDGE) assess a region’s basic economic development and growth. Specifically, the EDGE software performs two key functions:
 - a. **Economic Assessment** – Evaluates current economic conditions and likely future trends.
 - b. **Targeting Diagnostics** – Identifies industries that may provide the most appropriate basis for economic development.

The model does so by comparing a study region to a base region. A study or base region comprises one or more counties. For this analysis, the economic characteristics of the county where each airport is located were compared to the overall State of Missouri (i.e., the base region). It should be noted that the location of several of the study airports straddle one or more counties, which complicated county selection especially when 30-minute drive time market capture areas were considered. At issue was to select a representative service area that was not too large or too small. Given this concern, a modified approach of evaluating census tracts instead of counties was considered. However, the required data for a two-year period was not readily available. Nonetheless, the county data does provide the best representative perspective of the economic conditions of the regions served by each airport.

2. **InfoUSA** – Info USA provides data on employment level, sales amounts, industry code and description, as well as longitude and latitude, by individual firm or organization. The information for several counties surrounding the airports was obtained and evaluated to identify the number, size and type of firms that potentially use the study airports.

Specifically, the firms in the four major analysis sectors (manufacturing, business, tourism and institutional) with employment levels over 20 were identified within a 30-mile radius.

Detailed GA Activity Database – The GCR & Associates, Inc. database (Airport IQ Data Center) provides a valuable tool for understanding the nature and character of the general aviation activity at an airport. The Airport IQ Data Center combines general aviation activity with aircraft ownership databases to provide an active view of specific general aviation aircraft that operate at a specific airport. Information includes aircraft ownership, aircraft type and market-pairs served by each aircraft, and is based on flight plans filed with the FAA.

3.4.3. Economic Development Potential and Return on Investment

A traditional economic feasibility framework is used to evaluate the ROI. However, instead of quantifying the transport and operating cost-savings associated with the projects as typically addressed in FAA B/C analyses, this analysis compares the estimated state tax revenues to the project costs. The different approach is taken for two fundamental reasons. First, the magnitude of transport cost savings benefits are considered minor compared to the magnitude and underlying objective of overall economic development. Second, as an operating entity continually under scrutiny, the state must concern itself with the financial implications of its actions. This analysis attempts to estimate the economic development benefits associated with the capital improvement projects, and to compare the resulting state tax revenues to the capital improvement project costs.

Evaluation Structure – The ROI reflects the total change in project costs (e.g., construction, operations, and maintenance) over the 20-year period compared to the state tax revenues associated with the economic development benefits. Specifically, these costs and benefits are compared to yield three basic measures of effectiveness:

- *Net Present Value (NPV)* – The traditionally accepted decision rule for economic efficiency is to select the improvement project or alternative that yields the greatest NPV.
- *Internal Rate of Return (IRR)* – IRR is another useful tool in comparing a project's worthiness to others. It determines at what discount rate a project's net benefits will equal its net costs (the higher the IRR the more favorable the project). It provides a good measure of the project's robustness.
- *B/C Ratio* – The discounted benefits divided by the discounted costs. This suggests that all projects with a B/C ratio over one are economically feasible, while all of those under one are economically infeasible.

Benefit/cost analyses typically assess several alternatives to determine which yields the best results and are the most robust. Such a detailed analysis between alternatives is beyond the intent of this study; rather this study seeks to understand the general ROI on airport investments from an economic development and state financial perspective. In doing so, the principal challenge is identifying the potential economic development benefits for the various airports, and estimating the resulting tax revenues to the State of Missouri.

Discount Rate – Revenues and costs (present and future) are tabulated in constant dollars (excluding inflation). Because of the “time-value-of-money” and the preference of having returns earlier versus later, all future revenues and costs are “discounted-back” to a base year. By doing so, the analysis accounts for the “opportunity-cost” of investing in one project versus another. The selected discount rate greatly impacts the project’s feasibility and should reflect a project’s risk as well as the general cost of capital. This discount rate reflects an expected return-on-investment in the general marketplace if the project costs were invested elsewhere (i.e., the stock market, bonds, etc.). A constant dollar discount rate of 12% is typically required in the analysis of transportation projects, which excludes future price level changes (i.e., inflation). For this reason, it was used in the study.

However, a 12% return is very high, and it is often argued that a lower discount rate should be used. A lower rate often put forth is 4%, which reflects a more realistic potential return. For this reason, a second analysis using the 4% rate was conducted for all six projects. Nonetheless, the argument for using the 12% rate remains valid given the high uncertainty (i.e., risk) associated with a capital airport investment in which no guarantee is provided by users that they will invest in or expand their local business operations.

Project Perspective – As discussed previously, Capital Improvement Plans (CIPs) typically include several projects that are designed to enable the airport to better serve existing and potential users. In some circumstances apron expansions and NAVAIDs may be needed in addition to a runway expansion to ensure increased usage, but not at other airports. With this in mind, the capital improvements are considered from an overall project perspective and individual components are not evaluated separately.

Economic Development Impact Approach – The most challenging part of this analysis is to identify, quantify (in monetary terms), and substantiate the economic development impacts related to each airport’s CIP. Quantification of the potential economic development impacts should identify, when possible, which existing industries or specific firms are anticipated to grow and/or which new industries/firms will locate in the airport’s service area. This approach seeks to identify the direct economic development in an airport service area related to airport improvements while documenting the assumptions and information used. In doing so, caution is exercised in reviewing local development claims through review of available data and discussions with private firms.

In addition to the estimated direct economic development impacts, the IMPLAN model⁸ is used to estimate the multiplier impacts associated with supplier expenditures and the respending of wages and salaries. In doing so, the total economic impacts associated with the airport improvements are presented in terms of jobs, earnings, and output.

⁸ Minnesota IMPLAN Group, Inc (MIG, Inc) developed the IMPLAN® economic impact modeling system, which provides the tools, data, and support to do in-depth examinations of state, county or multi-county regions. MIG, Inc. has provided complex databases and IMPLAN software to public and private organizations since 1993. Additional information is found at <http://www.implan.com>.

State Tax Impact Approach – To estimate the resulting tax revenues that accrue to the state, a four-step process is used as summarized below:

1. Estimate the total annual earnings impacts, inclusive of the direct and multiplier impacts associated with the airport improvement;
2. Calculate the statewide income tax impacts;
3. Calculate the statewide sales tax impact; and
4. Add together the tax impacts.

The tax impact associated with a project that creates 100 direct jobs with an average annual salary of \$40,000 is demonstrated in **Exhibit 3-4**. Annual job and/or earnings impacts are then grown by the anticipated growth in annual aircraft operations at the airport, unless more specific information is available.

Exhibit 3-4
Statewide Tax Impacts – Example Calculation
Missouri Airport Investment Study

1. Earnings Impacts

| | |
|-----------------|--|
| 100 | Direct Jobs |
| <u>\$40,000</u> | Avg. Earnings per Job |
| \$4,000,000 | Direct Earnings Impacts |
| <u>1.5</u> | Avg. Earnings Multiplier |
| \$6,000,000 | Total Earnings Impacts (Direct & Multiplier) |

2. Statewide Income Tax Impacts

| | |
|-------------|------------------------------------|
| \$6,000,000 | Total Earnings Impacts |
| <u>2.2%</u> | Effective Personal Income Tax Rate |
| \$132,000 | MO Income Tax Revenues |

3. Statewide Sales Tax Impacts

| | |
|---------------|---------------------------------|
| \$6,000,000 | Total Earnings Impacts |
| <u>85.4%</u> | Avg. Consumption Rate |
| \$5,124,000 | MO Employee Consumption Impacts |
| <u>4.225%</u> | MO State Sales Tax Rate |
| \$216,500 | MO Sales Tax Revenues |

4. Total Statewide Tax Revenue Impacts

| | |
|----------------|------------------------|
| \$132,000 | MO Income Tax Revenues |
| <u>216,500</u> | MO Sales Tax Revenues |
| \$348,500 | MO Tax Revenue Impacts |

Source: Wilbur Smith Associates

While the marginal tax rate in Missouri is 6% on income over \$9,000, the income tax rate varies from 1.5%-5.5% for income levels below \$9,000.⁹ In addition, tax refunds, exemptions and other factors result in an effective state income tax that is significantly less than the 6% marginal rate. Specifically, comparison of state income tax receipts in FY 2006 (\$4.34 billion)¹⁰ to that of total personal income (\$186.1 billion)¹¹ yield an effective state income tax rate of 2.2%, which is used to estimate the State income tax receipts associated with total earnings impacts.

Average consumption rates, based on BEA data, was used to estimate the average share of earnings consumed on goods and services.¹² Specifically, the rate, 85.4%, was applied to the total earnings impact to estimate the resulting change in sales. The statewide sales tax rate was then applied to estimate the resulting state sales tax revenues.

Impact Estimation Constraints – This approach acknowledges that economic development impacts that may occur in an area depend on many factors, and that it is often not possible, or practical, to quantify the aviation-dependent share of resulting impacts. When it is impractical to estimate the associated economic development impacts, a breakeven analysis is conducted to determine what the required level of state tax collections would be for the project to breakeven, as well as the corresponding level of economic development. This information is then compared with the overall regional economy to make a qualitative assessment of whether or not the project is expected to generate a positive ROI.

Case Study Layout – Given the approach and constraints outlined above, the five case studies are assessed in a three-step manner. First, airport location and infrastructure information is presented regarding airport location and access, existing facilities, current and forecasted based aircraft and aircraft operations, and project development costs. Second, a regional economy and airport user analysis evaluates total county employment levels and growth relative to the state, and evaluates employment levels in typical aviation-user sectors. The analysis goes on to identify current airport users and overall employment of potential user industries.

Lastly, the economic development and ROI analysis estimates, when possible, the actual economic development that has (or will) occur due to the proposed investment. Associated state tax revenue estimates are then derived based on these economic development job and earnings impacts. These tax revenues are then compared with the project costs (including both the initial construction/equipment costs and any additional operation and maintenance costs) over a 20-year project analysis period to determine ROI from a state perspective.

⁹ Missouri Department of Economic Development, <http://go.missouridevelopment.org/databook>.

¹⁰ Specifically Declarations and Withholdings as reported in “Missouri Department of Revenue, Financial & Statistical Report”; FY ended June 30, 2006.

¹¹ FY estimate based on calendar year 2005 and 2006 data, MERIC (Missouri Economic Research and Information Center), Missouri Department of Economic Development.

¹² U.S. Department of Commerce, Bureau of Economic Analysis; comparison of annual personal consumption versus annual personal income

However, when such economic development impacts cannot be directly attributable to the airport investment, a reverse analysis is used to determine the level of tax returns, and associated economic development required to make the project feasible. Specifically, the reverse analysis estimates the change in jobs and economic development required to justify the investment. These required job/economic development impacts are then compared with the existing airport users and potential aviation users (i.e., typical aviation user sectors) to assess whether or not the investment has a reasonable potential to accommodate sufficient use to justify the investment.

With these constraints in mind, the case study analysis begins with the airport that has the most easily quantified economic development impacts, Monett Municipal Airport, followed by the other analysis of historical airport improvements, Creve Coeur Airport. The two existing airports with future planned improvements, Eldon Model Airpark and Lee's Summit Municipal, are then evaluated. The last case study concerns the newly planned airport, Branson West Airport.

Section 4:

Monett Municipal Airport – Case Study

4. Monett Municipal Airport – Case Study

This section provides a case study return on investment (ROI) analysis for the Monett Municipal Airport in which estimated state tax revenues associated with the economic development impacts are compared to the capital improvement project costs. The section begins with a review of the airport's location and infrastructure, followed by an analysis of the regional economy and major users. The information provides a means to compare the regional economic needs with the existing and planned airport infrastructure, and thereby gauge the resulting economic development impacts associated with airport development.

4.1. Airport Location and Infrastructure

The region around the Monett Municipal Airport depends significantly on general aviation airport facilities to accommodate the region's rising demand for goods and services. Past infrastructure improvements played a major role in accommodating existing industry growth in the airport study area as well as attracting new industry. The following subsection summarizes airport characteristics, activity and future needs.

Airport Location/Access – Monett Municipal Airport is located approximately five miles east of the City of Monett in Barry County, as shown in **Exhibit 4-1**. Excellent highway access is provided via U.S. Highway 60, a major two-lane highway. In addition, the map also indicates that five other airports are located in the region, four of which are within a 30-minute drive time of the airport. The primary runway facilities, total based aircraft and total aircraft operations for each are summarized in **Exhibit 4-2**.

Airport Facilities – Monett Airport is classified in the Missouri SASP as a Regional airport with a single runway, Runway 18/36, that was extended from 4,000 to 5,000 feet in 1999. Discussions with the airport manager and local business leaders indicate that various airport improvements such as the runway extension in 1999 and the new apron in 2003 were essential in accommodating existing business demand and attracting new industry to the region. Existing and recommended facilities are summarized in **Exhibit 4-3**.

Aviation Forecasts – Aircraft operations in 2002 totaled 11,403 and are forecast to grow steadily to 16,600 by the year 2022 (45.6%) as shown in **Exhibit 4-4**. Based aircraft totaled 25 in 2002 and are also forecast to grow steadily to 32 by 2022 (28.0%). The average annual operations per based aircraft ratio, approximately 456 operations/based aircraft in 2002, is forecast to rise to 519 operation/based aircraft by 2022.

Capital Development Costs – The 1,000-foot runway extension in 1999 cost \$1.5 million, the parallel taxiway in 2002 cost \$1.3 million, and the new apron in 2005 cost \$0.4 million. Combined, the recent development costs totaled \$3.2 million. Current capital development costs are estimated at \$0.6 million over the next five years and \$1.3 million over the ensuing 15-year period. Both recent and future development costs are summarized in **Exhibit 4-5**.

Exhibit 4-2
Regional Airport Facilities – Monett Municipal Airport
 Missouri Airport Investment Study

| Airport | Commercial Service | Primary Runway | | Based Aircraft | Aircraft Operations |
|-----------------------|--------------------|----------------|------------|----------------|---------------------|
| | | Length | Width | | |
| Monett Muni. | N | 5,000' | 75' | 25 | 11,403 |
| Aurora Memorial Muni. | N | 3,002' | 60' | 29 | 8,500 |
| Cassville Muni. | N | 3,600' | 60' | 12 | 3,000 |
| Joplin Commercial | Y | 6,502' | 150' | 108 | 44,461 |
| Mount Vernon Muni. | N | 3,195' | 58' | 8 | 5,102 |
| Neosho Hugh Robinson | N | 3,739' | 100' | 27 | 2,625 |

Source: Missouri State Airport System Plan, 2006

Exhibit 4-3
Airport Facilities and Services – Monett Municipal Airport
 Missouri Airport Investment Study

| | Existing | Minimum System Objective | Recommendation |
|----------------------------|-------------------|--|---|
| Airside Facilities | | | |
| Airport Reference Code | B-II | B-II | None |
| Primary Runway Length | 5,000' | 5,000' | None |
| Primary Runway Width | 75' | 75' | None |
| Taxiway Type | Full Parallel | Full Parallel | None |
| Approach | Non-Precision | Non-Precision | None |
| Lighting | MIRL/Reflectors | MIRL/MITL or Reflectors | None |
| NAVAIDS | Rotating Beacon | Rotating Beacon | None |
| | Lighted wind cone | Lighted wind cone/segmented circle | Install Segmented Circle |
| | REILs | REILs | None |
| | PAPIS | VGSI (VASIs/PAPIS) | Replace VASIs with PAPIS |
| Weather | AWOS | AWOS or Other | None |
| Landside Facilities | | | |
| Covered Storage | 28 spaces | 70% of based aircraft | None |
| Aircraft Apron | 16 spaces | 30% of based aircraft plus an additional 50% for transient use | 10 additional apron spaces |
| Terminal/Admin Building | 2,400 sq.ft. | 2,500 sq.ft. (incl. public restrooms, conference rooms and pilot lounge) | None |
| Auto Parking | 130 spaces | 1 space for each based aircraft plus 50% for employees/visitors | None |
| Fuel | AvGas/Jet A | AvGas and Jet A | None |
| FBO | Full Service | Full Service | None |
| Maintenance | None | Full Service | Provide Avionics/Aircraft Repair Services |
| Ground Transportation | Rental Cars | Rental Car Available | None |
| Ground Communications | Public Phone | Public Phone and GCO | Install GCO |

Source: Missouri State Airport System Plan, 2006

Exhibit 4-4

Aviation Forecasts – Monett Municipal Airport
Missouri Airport Investment Study

| Activity Forecasts | 2002 | 2007 | 2012 | 2022 |
|----------------------------|---------------|---------------|---------------|---------------|
| Aircraft Operations | | | | |
| Local | 6,480 | 7,200 | 8,000 | 9,400 |
| Itinerant | <u>4,923</u> | <u>5,500</u> | <u>6,000</u> | <u>7,200</u> |
| Total | 11,403 | 12,700 | 14,000 | 16,600 |
| Based Aircraft | | | | |
| Single-Engine | 14 | 15 | 16 | 18 |
| Multi-Engine | 4 | 4 | 5 | 5 |
| Jet | 7 | 8 | 8 | 9 |
| Helicopter | 0 | 0 | 0 | 0 |
| Glider | 0 | 0 | 0 | 0 |
| Ultralight | <u>0</u> | <u>0</u> | <u>0</u> | <u>0</u> |
| Total | 25 | 27 | 29 | 32 |

Source: Missouri State Airport System Plan, 2006

Exhibit 4-5

Capital Development Costs – Monett Municipal Airport
Missouri Airport Investment Study

| | |
|---|--------------------|
| Recent Development Projects | |
| Reconstruct, Extend and Widen Runway | \$1,503,000 |
| Reconstruct and Extend Parallel Taxiway | 1,286,300 |
| Construct Apron | <u>439,300</u> |
| Recent Development Costs | \$3,228,600 |
| Future Development Projects | |
| Short Term (5-Year) | |
| T-Hangar Pavement Maintenance | \$107,700 |
| Taxiway Pavement Maintenance | 65,700 |
| Improve Airport Drainage | 56,300 |
| Install Perimeter Fencing | 118,500 |
| Construct Hangar Taxiway | 200,000 |
| Install Lighted Wind Indicator | <u>22,500</u> |
| <i>Short Term Subtotal</i> | \$570,700 |
| Long Term (20-Year) | |
| Land Acquisition | \$500,000 |
| Crackfill Runway 18-36 | 441,600 |
| Crackfill Runway 18-36 Taxiway | <u>377,500</u> |
| <i>Long Term Subtotal</i> | \$1,319,100 |
| Total Future Development Costs | \$1,889,800 |

Source: Missouri State Airport System Plan, 2006

4.2. Regional Economy and Users

This section identifies countywide economic development and growth, as well as employment levels for typical firms that use/depend on GA airports. Specifically, the analysis focuses on those sectors considered most likely to use and/or benefit from GA airport improvements; namely tourism, business/convention, manufacturing and institutional sectors. Further, flight activity of major users who file flight plans are evaluated to identify major user firms, frequency, aircraft type and flight origin/destination data.

County Employment – Monett Municipal Airport is located in the northern portion of Barry County, where a total of over 36,141 people are employed. Of these, approximately 21,200 (59%) work in the four key sectors that potentially rely on general aviation for the transport of people, equipment or goods. While the manufacturing sector employment fell 2.7% per year between 1998 and 2003, the other sectors rose, especially the institutional sector (11.3% per year), as summarized below in **Exhibit 4-6**.

Exhibit 4-6

Employment Growth by Key Sector – Barry County (Monett)

Missouri Airport Investment Study

| Industry Sector | | Employment | | Avg. |
|----------------------|------------|---------------|---------------|--------|
| Description | SIC Codes | 1998 | 2003 | Annual |
| Key Sectors | | | | |
| Manufacturing | 20-39 | 14,322 | 12,516 | -2.7% |
| Business | 81, 87, 89 | 1,064 | 1,116 | 1.0% |
| Tourism | 70, 79 | 475 | 608 | 5.1% |
| Institutional | 80, 82 | <u>4,048</u> | <u>6,918</u> | 11.3% |
| Subtotal | | 19,909 | 21,158 | 1.2% |
| Other Sectors | | <u>13,676</u> | <u>14,983</u> | 1.8% |
| Total | | 33,585 | 36,141 | 1.5% |

Source: U.S. Bureau of the Census

Development and Growth – Results of the EDGE analysis, as shown in **Exhibit 4-7**, indicate that several of the potential aviation user industries have growth potential in Barry County (SIC 20, 37, 70, 73, 80, 81, 82, 89). Only a few industries show production cost concerns, most notably the business services industry (SIC 73), which reflects the high wages associated with a major local employer and airport user, Jack Henry & Associates. Further, the same sector also indicates a labor shortage, as do several other sectors. The EDGE analysis highlights the growth potential versus the competitive concerns regarding production costs and labor market for one of the region’s major employers.

Exhibit 4-7

Economic Development & Growth Summary – Barry County (Monett)
Missouri Airport Investment Study

| SIC | Industry | Growth Potential | Competive Concerns | | SIC | Industry | Growth Potential | Competive Concerns | |
|-----|------------------------------------|------------------|--------------------|--------------|-----|-----------------------------------|------------------|--------------------|--------------|
| | | | Production Costs | Labor Market | | | | Production Costs | Labor Market |
| 7 | Agricultural services | | | | 48 | Communications | | | |
| 8 | Forestry | | | | 49 | Electric, gas & sanitary services | | | |
| 9 | Fishing | | | | 50 | Wholesale trade-durable goods | | | |
| 10 | Metal mining | X | | | 51 | Wholesale trade - nondurables | | | |
| 12 | Coal mining | | | | 52 | Bldg materials & garden supplies | | | |
| 13 | Oil and gas extraction | | | | 53 | General merchandise | | | |
| 14 | Nonmetallic minerals, exc. fuels | | | | 54 | Foods stores | X | | X |
| 15 | General contractors | X | | X | 55 | Auto dealers & service stations | X | | X |
| 16 | Heavy construction | | | | 56 | Apparel and accessory stores | X | | |
| 17 | Special trade contractors | X | | | 57 | Furniture and home stores | X | | X |
| 20 | Food and kindred products | X | | | 58 | Eating and drinking estabs | | | |
| 21 | Tobacco products | | | | 59 | Miscellaneous retail | | | X |
| 22 | Textile mill products | | | | 60 | Depository institutions | | | |
| 23 | Apparel & other textile products | | | | 61 | Nondepository institutions | | | X |
| 24 | Lumber and wood products | | | | 62 | Security & commodity brokers | | | X |
| 25 | Furniture and fixtures | | | | 63 | Insurance carriers | | X | XX |
| 26 | Paper and allied products | | | | 64 | Insurance agents, services | | | XX |
| 27 | Printing and publishing | | | | 65 | Real estate | | | |
| 28 | Chemicals and allied products | | | | 66 | Holding, investment offices | | | |
| 29 | Petroleum and coal products | | | | 70 | Hotels and other lodging | X | X | |
| 30 | Rubber & misc. plastics products | | | | 72 | Personal services | X | | |
| 31 | Leather and leather products | | | | 73 | Business services | X | X | X |
| 32 | Stone, Clay, and glass products | | | | 75 | Auto repair, services, parking | | | |
| 33 | Primary metal industries | | | | 76 | Miscellaneous repair services | X | | |
| 34 | Fabricated metal products | | | | 78 | Motion pictures | | | |
| 35 | Industrial machinery and equip. | | | | 79 | Amusements & recreation | | | |
| 36 | Electronic & other electric equip. | | | | 80 | Health services | X | | |
| 37 | Transportation equipment | X | | | 81 | Legal services | X | | XX |
| 38 | Instruments & related products | | | | 82 | Educational services | X | | X |
| 39 | Mis. manufacturing industries | | | | 83 | Social services | X | | X |
| 41 | Local & interurban pass. transit | | | | 84 | Museums, botanical, zoos | | | |
| 42 | Trucking and warehousing | | | | 86 | Membership organizations | X | | X |
| 44 | Water transportation | | | | 87 | Engineering & management | | | |
| 45 | Transportation by air | | | | 89 | Services, other | X | | X |
| 46 | Pipelines, except natural gas | X | X | | 99 | Unclassified establishments | | | |
| 47 | Transportation services | | | | | | | | |

Note: "xx" in the Labor Market indicates a major concern

Source: Wilbur Smith Associates

- Tourism
- Business Services
- Manufacturing
- Institutional

Potential Airport User Employment – Another source, InfoUSA, was used to obtain employment by firm in the region for firms with 20+ employees. Given the rural nature of the region, approximately 60 firms were identified as potential users, however these firms include major manufacturers who employ approximately 9,500 people with regional sales revenues of \$1.7 billion (see Appendix B). Location and size of these firms relative to Monett and the other regional airports is shown by major industry type in **Exhibit 4-8** (next page).

Discussions with the Airport Manager, City Mayor and business leaders indicate eight firms use the airport to transport personnel, customers, vendors and/or clients. These eight firms employ nearly 5,300 people with sales of over \$850 million, as shown in **Exhibit 4-9**. Of these eight firms, Jack Henry & Associates is the major user.

Exhibit 4-9
Key Airport Users – Monett Municipal Airport
 Missouri Airport Investment Study

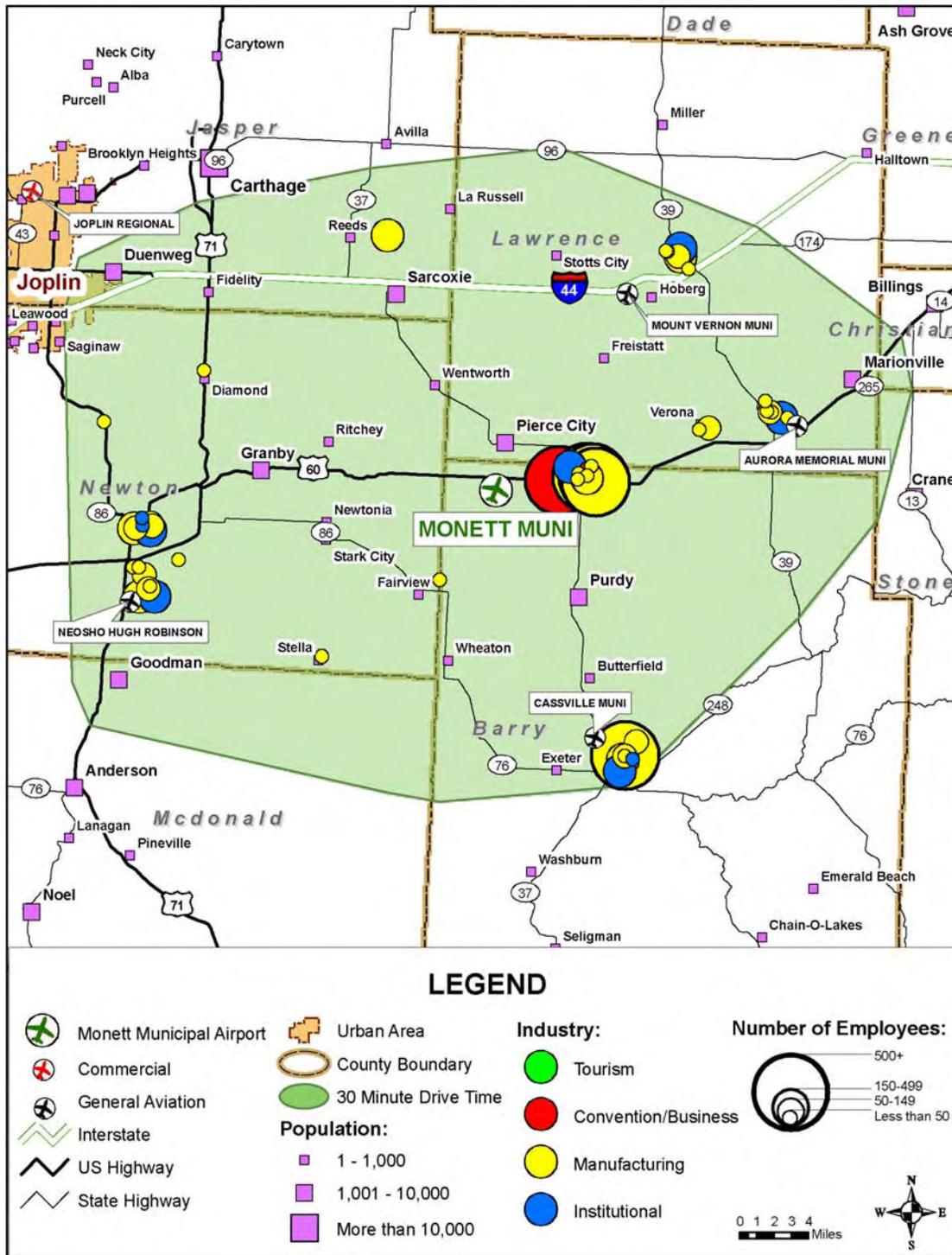
| Company Name | City | SIC Code | SIC Description | Jobs | Sales (\$000) |
|-----------------------------------|---------------|-------------|--|--------------|------------------|
| Efco Corp | Monett | 33.0 | Aluminum Extruded Products (Mfrs) | 1,350 | 93,300 |
| Fasco Motors Group | Cassville | 36.0 | Electric Motors-Manufacturers | 812 | 207,060 |
| Jack Henry & Assoc Inc | Monett | 73.0 | Computers-Sys. Designers & Consultants | 1,049 | 52,000 |
| Justin Boot Co | Cassville | 31.0 | Boots-Manufacturers | 217 | 45,136 |
| Mid-America Hardwoods Inc | Sarcoxie | 24.0 | Wood Products NEC (Manufacturers) Sporting & Athletic Goods NEC | 250 | 20,300 |
| Miracle Recreation Equipment | Monett | 39.0 | (Mfrs) | 500 | 145,000 |
| Schreiber Foods | Mt Vernon | 20.0 | Food Products & Manufacturers | 185 | 74,925 |
| Tyson Foods Inc | Monett | 20.0 | Poultry Processing Plants | <u>900</u> | <u>212,400</u> |
| Total | | | | 5,263 | \$850,121 |

Source: InfoUSA

Major Current Airport Users – A summary of major Monett Municipal Airport users, according to logged flight plans, is presented in **Exhibit 4-10**. A full list of logged flight plan users is provided in Appendix C. The table indicates that Jack Henry & Associates, based in Monett, is the dominant business user with six jet aircraft and 1,650 annual operations. The firm provides computer system design services nationwide and employs 36 at-airport employees, including pilots and aircraft mechanics.¹³

¹³ The airport-related impacts of these 36 employees was included in the economic impacts calculated as part of the SASP.

Exhibit 4-8
Airport User Industries by Firm Location – Monett
 Missouri Airport Investment Study



Source: Wilbur Smith Associates

Exhibit 4-10

Major Airport Users – Monett Municipal Airport
Missouri Airport Investment Study

| Firm | Registered Location | | Aircraft Data | | | Annual Opers |
|-------------------------|---------------------|-------|---------------|------------------|--------|--------------|
| | City | State | Tail # | Make/Model | Class | |
| Jack Henry & Assoc. Inc | Monett | MO | N152JH | Cessna 560 | Jet | 336 |
| | | | N157JH | Cessna 560 | Jet | 319 |
| | | | N154JH | Cessna 560 | Jet | 300 |
| | | | N156JH | Cessna 560 | Jet | 275 |
| | | | N198JH | Cessna 525 | Jet | 214 |
| | | | N155JH | Cessna 560 | Jet | 206 |
| MS Flying Inc | Monett | MO | N191JH | Beech A36 | Piston | 176 |
| JKS Llc | Wilmington | DE | N545EC | Learjet Inc 45 | Jet | 106 |
| TMS Holding Corp | Wilmington | DE | N1529L | Beech F33A | Piston | 27 |
| Grayson-Madison Inc | Wilmington | DE | N6537C | Piper Pa-34-200T | Piston | 22 |
| Tecumseh Products | Tecumseh | MI | N552TP | Raytheon B300 | Turbo | 14 |
| | | | N551TP | Raytheon B300 | Turbo | 14 |
| TSMT Marketing Co | Joplin | MO | N550SJ | Cessna S550 | Jet | 14 |
| | | | N550SJ | Cessna S550 | Jet | 2 |

Source: WSA analysis of GCR & Associates data

4.3. Economic Development Impacts and ROI

Two economic development ROI analyses associated with past airport improvements at Monett were conducted. The first concerns the \$2.8 million runway and parallel taxiway reconstruction/extension project (see above), which enabled an off-airport user firm to grow in the region versus moving to a different location or constraining growth. In fact, firm's use of the airport became so great that it now bases six jets at Monett Municipal and has 36 aviation-related employees at the airport, as explained below. The second analysis concerns a new \$440,000 apron that has already attracted an at-airport aircraft service firm, which can also accommodate other users.

4.3.1. Runway and Taxiway Extension

The runway and taxiway extensions enabled a major employer, Jack Henry & Associates to remain in the region and grow. The \$1.5 million runway project in 1999 included reconstruction, extension and widening. The subsequent \$1.3 million taxiway project in 2002 included reconstruction and lengthening of the parallel runway. Since 1989, the software developer has grown from approximately 100 employees to 1,100 in 2006. Discussions with the software design firm indicate that without airport facilities capable of accommodating jet aircraft, it would have moved a vast majority if not all of its operations to another airport. For this reason, the firm seriously considered relocating to Dallas, TX. Therefore, the runway extension played a vital

role in retaining the firm. This need for appropriate aviation facilities is highlighted by the fact that the firm bases and operates six jet aircraft at the airport, as discussed previously.

Economic and Tax Impacts – The direct impacts associated with the runway improvements represent the change in jobs, earnings and sales. Since completion of the runway in 1998, employment has increased from approximately 600 in 1997 to 1,100 in 2006. Future growth is conservatively estimated at an annual growth rate of 3.4 percent, which reflects the forecasted annual operations growth. Based on this approach, the estimated direct change in airport employment attributable to the runway improvements rose from 21 jobs in 1998 to 258 jobs in 2006, and is expected to continue rising to 372 additional jobs by 2017, as shown in **Exhibit 4-11**. These are significant employment benefits that drive the ensuing impact and ROI estimates. Nonetheless, these benefits are considered conservative because they exclude: (1.) the negative benefits of the firm moving away from the region; and (2.) the additional marginal benefits associated with other firm use.

Exhibit 4-11

Direct Job Impact Changes and Total Firm Jobs – Monett Runway Extension
Missouri Airport Investment Study

| | | Jobs | | | | Jobs | |
|------------|------------|---------------|-------|------------|------------|---------------|-------|
| Proj. Year | Caln. Year | Direct Change | Total | Proj. Year | Caln. Year | Direct Change | Total |
| 0 | 1997 | -- | 600 | | | | |
| 1 | 1998 | 21 | 640 | 11 | 2008 | 276 | 1,140 |
| 2 | 1999 | 29 | 680 | 12 | 2009 | 285 | 1,160 |
| 3 | 2000 | 40 | 730 | 13 | 2010 | 295 | 1,180 |
| 4 | 2001 | 55 | 780 | 14 | 2011 | 305 | 1,200 |
| 5 | 2002 | 75 | 830 | 15 | 2012 | 315 | 1,220 |
| 6 | 2003 | 103 | 890 | 16 | 2013 | 326 | 1,240 |
| 7 | 2004 | 141 | 950 | 17 | 2014 | 337 | 1,260 |
| 8 | 2005 | 193 | 1,020 | 18 | 2015 | 348 | 1,280 |
| 9 | 2006 | 258 | 1,100 | 19 | 2016 | 360 | 1,300 |
| 10 | 2007 | 267 | 1,120 | 20 | 2017 | 372 | 1,320 |

Source: Wilbur Smith Associates

The total statewide impact of the airport runway improvements are estimated using the direct job impact estimates, sales data provided by both Jack Henry & Associates and InfoUSA, and the IMPLAN multipliers. Specifically, the direct impact in 1998 of the runway extension led to an estimated 21 jobs with earnings of \$753,900 and total output of \$1.8 million. The total impact rose to an estimated 500 jobs (258 direct and 242 multiplier) by 2006, and 720 jobs (372 direct and 348 indirect) by 2017, as shown in **Exhibit 4-12**.

Exhibit 4-12

Breakeven Economic Impact and Tax Collections – Monett Runway Extension
Missouri Airport Investment Study

| | 1998 | 2006 | 2017 |
|-------------------------|---------------|----------------|----------------|
| Economic Impacts | | | |
| Direct | | | |
| Jobs | 21 | 258 | 372 |
| Earnings | \$753,900 | \$9,262,200 | \$13,354,800 |
| Output | \$1,782,900 | \$21,904,200 | \$31,582,800 |
| Multiplier | | | |
| Jobs | 19 | 242 | 348 |
| Earnings | \$551,000 | \$7,018,000 | \$10,092,000 |
| Output | \$1,517,100 | \$18,695,800 | \$27,017,200 |
| Total | | | |
| Jobs | 40 | 500 | 720 |
| Earnings | \$1,304,900 | \$16,280,200 | \$23,446,800 |
| Output | \$3,300,000 | \$40,600,000 | \$58,600,000 |
| Tax Collections | | | |
| State Income Tax | \$28,700 | \$358,200 | \$515,800 |
| State Sales Tax | <u>47,100</u> | <u>587,400</u> | <u>846,000</u> |
| Total State Taxes | \$75,800 | \$945,600 | \$1,361,800 |

Source: Wilbur Smith Associates

It is estimated that the state received an additional \$75,800 in state income and sales tax receipts due to the runway extension at Monett. This estimate is based on an effective state income tax rate of 2.2%, the actual State sales tax rate of 4.225%, and an average consumption rate of 85.4%. The significant growth in employment at Jack Henry & Associates, combined with the multiplier effects suggest that the state tax impacts will rise to \$0.9 million in 2006 and \$1.4 million in 2017.¹⁴ This estimate excludes local taxes as well as other taxes and fees collected at the state and local levels. Further, the analysis excludes impacts associated with other local airport users.

State Tax Impacts and ROI – Based on these estimated tax impacts, the NPV of the runway improvement project from a state tax revenue perspective is \$1.4 million with an IRR of 18.5% and a B/C ratio of 1.54, as shown in **Exhibit 4-13**. The calculation includes the total cost of the capital runway and taxiway improvements, an annual increase in operating costs, and a residual value.¹⁵ Clearly this project generated an attractive ROI.

¹⁴ In constant 2006 dollar values.

¹⁵ Operating costs estimated at 2.5% of the capital cost; residual value assumes a 20-year project life.

Exhibit 4-13
Return on Investment - Monett Runway Extension
 Missouri Airport Investment Study

| Proj Year | Cain Year | Airport Improvement Costs | | | Economic Development Tax Impacts | | | Present Worth | | | Discounted Totals | | |
|--------------|--------------|---------------------------|-----------------|-------------|----------------------------------|--------------|-----------|---------------|--------|-------------|-------------------|---------------|----|
| | | Capital | Ops & Maint. | Total | Income Tax | Sales Tax | Residual | Total | Factor | Costs | Benefits | Net Change | |
| 0 | 1998 | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| 1 | 1999 | \$1,503,000 | 37,600 | 1,540,600 | \$28,700 | \$47,100 | -- | \$75,800 | 1.0000 | \$1,540,600 | \$75,800 | (\$1,464,800) | |
| 2 | 2000 | 37,600 | 37,600 | 37,600 | 39,400 | \$64,500 | -- | 103,900 | 0.8929 | 33,600 | 92,800 | 59,200 | |
| 3 | 2001 | 37,600 | 37,600 | 37,600 | 54,000 | \$88,500 | -- | 142,500 | 0.7972 | 30,000 | 113,600 | 83,600 | |
| 4 | 2002 | 1,286,300 | 69,700 | 1,356,000 | 74,000 | \$121,300 | -- | 195,300 | 0.7118 | 965,200 | 139,000 | -826,200 | |
| 5 | 2003 | 69,700 | 69,700 | 69,700 | 101,400 | \$166,300 | -- | 267,700 | 0.6355 | 44,300 | 170,100 | 125,800 | |
| 6 | 2004 | 69,700 | 69,700 | 69,700 | 139,000 | \$228,000 | -- | 367,000 | 0.5674 | 39,500 | 208,200 | 168,700 | |
| 7 | 2005 | 69,700 | 69,700 | 69,700 | 190,600 | \$312,500 | -- | 503,100 | 0.5066 | 35,300 | 254,900 | 219,600 | |
| 8 | 2006 | 69,700 | 69,700 | 69,700 | 261,200 | \$428,500 | -- | 689,700 | 0.4523 | 31,500 | 312,000 | 280,500 | |
| 9 | 2007 | 69,700 | 69,700 | 69,700 | 358,200 | \$587,400 | -- | 945,600 | 0.4039 | 28,200 | 381,900 | 353,700 | |
| 10 | 2008 | 69,700 | 69,700 | 69,700 | 370,200 | \$607,200 | -- | 977,400 | 0.3606 | 25,100 | 352,500 | 327,400 | |
| 11 | 2009 | 69,700 | 69,700 | 69,700 | 382,700 | \$627,700 | -- | 1,010,400 | 0.3220 | 22,400 | 325,300 | 302,900 | |
| 12 | 2010 | 69,700 | 69,700 | 69,700 | 395,600 | \$648,900 | -- | 1,044,500 | 0.2875 | 20,000 | 300,300 | 280,300 | |
| 13 | 2011 | 69,700 | 69,700 | 69,700 | 409,000 | \$670,700 | -- | 1,079,700 | 0.2567 | 17,900 | 277,100 | 259,200 | |
| 14 | 2012 | 69,700 | 69,700 | 69,700 | 422,800 | \$693,400 | -- | 1,116,200 | 0.2292 | 16,000 | 255,800 | 239,800 | |
| 15 | 2013 | 69,700 | 69,700 | 69,700 | 437,000 | \$716,700 | -- | 1,153,700 | 0.2046 | 14,300 | 236,100 | 221,800 | |
| 16 | 2014 | 69,700 | 69,700 | 69,700 | 451,700 | \$740,900 | -- | 1,192,600 | 0.1827 | 12,700 | 217,900 | 205,200 | |
| 17 | 2015 | 69,700 | 69,700 | 69,700 | 467,000 | \$765,900 | -- | 1,232,900 | 0.1631 | 11,400 | 201,100 | 189,700 | |
| 18 | 2016 | 69,700 | 69,700 | 69,700 | 482,700 | \$791,700 | -- | 1,274,400 | 0.1456 | 10,200 | 185,600 | 175,400 | |
| 19 | 2017 | 69,700 | 69,700 | 69,700 | 499,000 | \$818,400 | -- | 1,317,400 | 0.1300 | 9,100 | 171,300 | 162,200 | |
| 20 | 2018 | 69,700 | 69,700 | 69,700 | 515,800 | \$846,000 | 415,910 | 1,777,710 | 0.1161 | 8,100 | 206,400 | 198,300 | |
| Totals | | \$2,789,300 | \$1,297,700 | \$4,087,000 | \$6,080,000 | \$9,971,600 | \$415,910 | \$16,467,510 | | \$2,915,400 | \$4,477,700 | \$1,562,300 | |

| | |
|---------------|-------------|
| Discount Rate | 12.0% |
| NPV | \$1,395,000 |
| IRR | 18.5% |
| B/C Ratio | 1.54 |

Source: Wilbur Smith Associates

4.3.2. Apron Expansion

The apron expansion at Monett Municipal Airport attracted a new aircraft service firm, Golden Aviation, to the region. The apron provided area for the firm to build a hangar that could service aircraft. Without the new apron, sufficient area was not available for the firm to accommodate aircraft movement. The firm currently employees approximately 15 people. In addition, the apron area is sufficient to accommodate another hangar for corporate or aircraft service use.

Economic and Tax Impacts – The direct impact associated with the apron expansion represents the change in jobs, earnings and sales. Completion of the apron in 2005 attracted a new aircraft service firm that reportedly began employing 15 people in 2006. In addition, another aircraft services firm or corporate flight department is anticipated to build a similar hangar across from Golden Aviation within the next few years. This analysis assumed that such a facility would become operational in 2010 and initially employ 15 people. Future growth is conservatively estimated at an annual rate of 1.9%, which reflects the forecasted annual operations growth. Based on these assumptions, the estimated direct change in airport employment attributable to the apron improvements rises from 15 jobs in 2006 to 41 jobs in 2024 as shown in **Exhibit 4-14**. These are modest employment benefits that drive the ensuing impact and ROI estimates.

Exhibit 4-14
Direct Job Impact Estimates – Monett Apron Expansion
 Missouri Airport Investment Study

| Project Year | Calendar Year | Direct Jobs | Project Year | Calendar Year | Direct Jobs |
|--------------|---------------|-------------|--------------|---------------|-------------|
| 1 | 2005 | 0 | 11 | 2015 | 35 |
| 2 | 2006 | 15 | 12 | 2016 | 35 |
| 3 | 2007 | 16 | 13 | 2017 | 36 |
| 4 | 2008 | 16 | 14 | 2018 | 37 |
| 5 | 2009 | 16 | 15 | 2019 | 37 |
| 6 | 2010 | 31 | 16 | 2020 | 38 |
| 7 | 2011 | 32 | 17 | 2021 | 39 |
| 8 | 2012 | 33 | 18 | 2022 | 40 |
| 9 | 2013 | 33 | 19 | 2023 | 40 |
| 10 | 2014 | 34 | 20 | 2024 | 41 |

Source: Wilbur Smith Associates

The total statewide impact of the airport apron expansion is estimated using the direct job impact estimates, sales data provided by InfoUSA, and the IMPLAN multipliers. Specifically, the direct impact in 2006 of the runway extension led to an estimated 34 jobs with earnings of \$894,000 and total output of \$3.0 million. The total impact is estimated to rise to 76 jobs (41 direct and 35 multiplier) by 2024, as shown in **Exhibit 4-15**.

Exhibit 4-15
Breakeven Economic Impact and Tax Collections – Monett Apron Expansion
 Missouri Airport Investment Study

| | 2006 | 2014 | 2024 |
|-------------------------|---------------|---------------|---------------|
| Economic Impacts | | | |
| Direct | | | |
| Jobs | 15 | 34 | 41 |
| Earnings | \$562,500 | \$1,275,000 | \$1,537,500 |
| Output | \$1,735,500 | \$3,933,800 | \$4,743,700 |
| Multiplier | | | |
| Jobs | 19 | 29 | 35 |
| Earnings | \$331,500 | \$751,500 | \$906,200 |
| Output | \$1,264,500 | \$2,866,200 | \$3,456,300 |
| Total | | | |
| Jobs | 34 | 63 | 76 |
| Earnings | \$894,000 | \$2,026,000 | \$2,443,700 |
| Output | \$3,000,000 | \$6,800,000 | \$8,200,000 |
| Tax Collections | | | |
| State Income Tax | \$19,700 | \$45,700 | \$53,800 |
| State Sales Tax | <u>32,300</u> | <u>75,000</u> | <u>88,200</u> |
| Total State Taxes | \$52,000 | \$120,700 | \$142,000 |

Source: Wilbur Smith Associates

It is estimated that the state will receive an additional \$52,000 in state income and sales tax receipts in 2006 due to the apron expansion at Monett. This estimate is based on an effective state income tax rates of 2.2%, the actual state sales tax rate of 4.225%, and an average consumption rate of 85.4%. The significant attraction of a second aviation operation alongside the apron in 2010 combined with the multiplier effects suggest that the State tax impacts will rise to \$120,700 in 2014¹⁶. This estimate excludes local taxes as well as other taxes and fees collected at the State and local levels. Further, the analysis excludes impacts associates with the other local airport users.

State Tax Impacts and ROI – Based on these estimated tax impacts, the NPV of the project from a state tax revenue perspective is \$127,800 with an IRR of 15.8% and a B/C ratio of 1.27, as shown in **Exhibit 4-16**. The calculation includes the total cost of the capital improvements, an annual increase in operating costs, and a residual value¹⁷. Clearly this project generated an attractive ROI.

¹⁶ In constant 2006 dollar values.

¹⁷ Operating costs estimated at 2.5% of the capital cost; residual value assumes a 20-year project life.

Exhibit 4-16
Return on Investment - Monett Apron Expansion
 Missouri Airport Investment Study

| Proj Year | Cain Year | Airport Improvement Costs | | | Economic Development Tax Impacts | | | Present Worth Factor | | | Discounted Totals | | |
|-----------|-----------|---------------------------|--------------|-----------|----------------------------------|-------------|----------|----------------------|--------|-----------|-------------------|------------|----|
| | | Capital | Ops & Maint. | Total | Income Tax | Sales Tax | Residual | Total | Factor | Costs | Benefits | Net Change | |
| 0 | 2004 | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| 1 | 2005 | \$439,300 | 11,000 | 450,300 | -- | -- | -- | \$0 | 1.0000 | 450,300 | 0 | -450,300 | |
| 2 | 2006 | -- | 11,000 | 11,000 | 19,700 | 32,300 | -- | 52,000 | 0.8929 | 9,800 | 46,400 | 36,600 | |
| 3 | 2007 | -- | 11,000 | 11,000 | 20,900 | 34,200 | -- | 55,100 | 0.7972 | 8,800 | 43,900 | 35,100 | |
| 4 | 2008 | -- | 11,000 | 11,000 | 20,900 | 34,200 | -- | 55,100 | 0.7118 | 7,800 | 39,200 | 31,400 | |
| 5 | 2009 | -- | 11,000 | 11,000 | 20,900 | 34,200 | -- | 55,100 | 0.6355 | 7,000 | 35,000 | 28,000 | |
| 6 | 2010 | -- | 11,000 | 11,000 | 36,100 | 59,200 | -- | 95,300 | 0.5674 | 6,200 | 54,100 | 47,900 | |
| 7 | 2011 | -- | 11,000 | 11,000 | 37,900 | 62,100 | -- | 100,000 | 0.5066 | 5,600 | 50,700 | 45,100 | |
| 8 | 2012 | -- | 11,000 | 11,000 | 39,800 | 65,300 | -- | 105,100 | 0.4523 | 5,000 | 47,500 | 42,500 | |
| 9 | 2013 | -- | 11,000 | 11,000 | 44,600 | 73,100 | -- | 117,700 | 0.4039 | 4,400 | 47,500 | 43,100 | |
| 10 | 2014 | -- | 11,000 | 11,000 | 45,700 | 75,000 | -- | 120,700 | 0.3606 | 4,000 | 43,500 | 39,500 | |
| 11 | 2015 | -- | 11,000 | 11,000 | 45,700 | 75,000 | -- | 120,700 | 0.3220 | 3,500 | 38,900 | 35,400 | |
| 12 | 2016 | -- | 11,000 | 11,000 | 46,300 | 75,900 | -- | 122,200 | 0.2875 | 3,200 | 35,100 | 31,900 | |
| 13 | 2017 | -- | 11,000 | 11,000 | 47,700 | 78,200 | -- | 125,900 | 0.2567 | 2,800 | 32,300 | 29,500 | |
| 14 | 2018 | -- | 11,000 | 11,000 | 49,100 | 80,600 | -- | 129,700 | 0.2292 | 2,500 | 29,700 | 27,200 | |
| 15 | 2019 | -- | 11,000 | 11,000 | 49,700 | 81,600 | -- | 131,300 | 0.2046 | 2,300 | 26,900 | 24,600 | |
| 16 | 2020 | -- | 11,000 | 11,000 | 51,200 | 84,000 | -- | 135,200 | 0.1827 | 2,000 | 24,700 | 22,700 | |
| 17 | 2021 | -- | 11,000 | 11,000 | 52,700 | 86,500 | -- | 139,200 | 0.1631 | 1,800 | 22,700 | 20,900 | |
| 18 | 2022 | -- | 11,000 | 11,000 | 54,200 | 88,900 | -- | 143,100 | 0.1456 | 1,600 | 20,800 | 19,200 | |
| 19 | 2023 | -- | 11,000 | 11,000 | 54,900 | 90,100 | -- | 145,000 | 0.1300 | 1,400 | 18,900 | 17,500 | |
| 20 | 2024 | -- | 11,000 | 11,000 | 53,800 | 88,200 | -- | 142,000 | 0.1161 | 1,300 | 16,500 | 15,200 | |
| Totals | | \$439,300 | \$220,000 | \$659,300 | \$791,800 | \$1,298,600 | \$0 | \$2,090,400 | | \$531,300 | \$674,300 | \$143,000 | |

Source: Wilbur Smith Associates

| | |
|---------------|-----------|
| Discount Rate | 12% |
| NPV | \$127,800 |
| IRR | 15.8% |
| B/C Ratio | 1.27 |

Section 5:
Creve Coeur Airport –Case Study

5. Creve Coeur – Case Study

This section provides a case study return on investment (ROI) analysis for the Creve Coeur Airport in which potential economic development benefits are compared to the capital improvement project costs. The section begins with a review of the airport's location and infrastructure, followed by an analysis of the regional economy and major users. The information provides a means to compare the regional economic needs with the existing and planned airport infrastructure, and thereby gauge the potential economic development benefits associated with airport development.

5.1. Airport Location and Infrastructure

The region around the existing Creve Coeur Airport is undergoing notable change, which may lead to the need for expanded general aviation airport facilities to accommodate the region's rising demand for goods and services. Conversely, the region around the airport may grow in a more residential manner that would not require major facility improvements at Creve Coeur. The following subsection summarizes airport characteristics, activity and future needs.

Airport Location/Access – Creve Coeur Airport is located approximately 20 miles west/northwest of downtown St. Louis in St. Louis County, as seen in **Exhibit 5-1**. In addition, the map also indicates that four other airports are located in the region, one of which, Lambert-St. Louis International, provides extensive commercial passenger service. The primary runway facilities, total based aircraft and total aircraft operations for the four general aviation service airports are summarized in **Exhibit 5-2**. Excellent highway access is provided via Maryland Heights Expressway, a major four-lane divided highway with limited access, and nearby connectivity to S.R. 364 and Interstates 70 and 270, as seen in **Exhibit 5-3**.

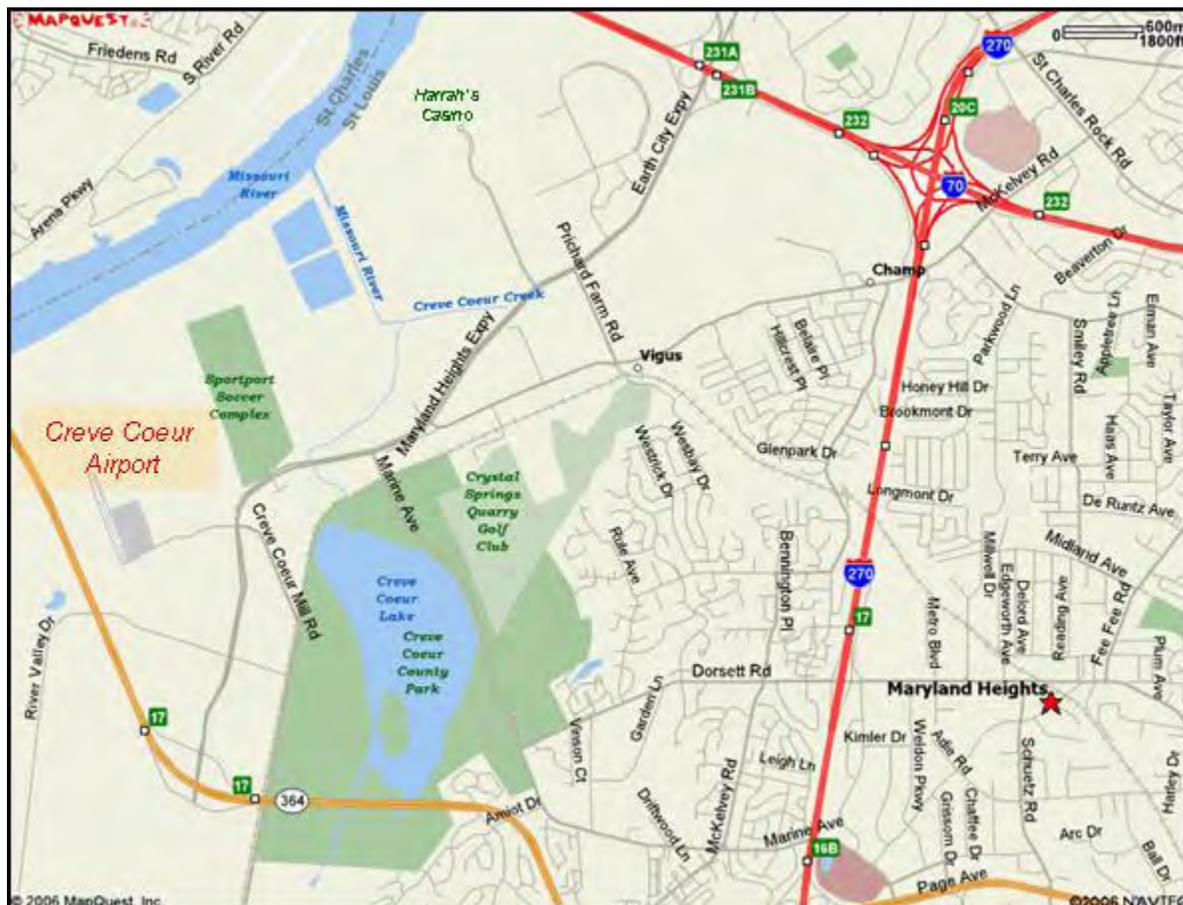
Discussions with the airport manager indicate the recent levy improvements raised flood levels from the 100- to 500-year levels. This combined with rapid growth of the Earth City business area (just north of I-70) is currently inducing local farmers to sell agricultural property surrounding the airport to developers. The nature of future development around the airport is still unclear. Creve Coeur Airport lies within the City of Maryland Heights and discussions with City Administrators indicate a residential and tourist-oriented development plan; they do not envision Maryland Heights as an extension of the Earth City business development. However, the location, highway access and lack of development around the airport make it an attractive location for business/industrial park development.

Exhibit 5-2
Regional Airport Facilities – Creve Coeur Airport
 Missouri Airport Investment Study

| Airport | Commercial Service | Primary Runway Length | Primary Runway Width | Based Aircraft | Aircraft Operations |
|--------------------------|--------------------|-----------------------|----------------------|----------------|---------------------|
| Creve Coeur | N | 4,500' | 75' | 331 | 33,000 |
| Spirit of St. Louis | N | 7,485' | 150' | 426 | 184,371 |
| St. Charles | N | 3,451' | 49' | 106 | 43,000 |
| St. Charles County Smart | N | 3,801' | 75' | 92 | 55,100 |

Source: Missouri State Aviation System Plan

Exhibit 5-3
Airport Location – Creve Coeur Airport
 Missouri Airport Investment Study



Source: MapQuest.com

Airport Facilities – Creve Coeur Airport is classified in the Missouri SASP as a Commercial airport with two runways, Runway 16/34 and Runway 07/25, that are 4,500 and 3,040 feet long, respectively. The minimum system objective is to extend the primary runway to 5,500 feet. Discussions with the airport manager indicate that AWOS system is essential to corporate jet activity. Existing, minimum objective and recommended facilities are summarized in **Exhibit 5-4**.

Exhibit 5-4
Airport Facilities and Services – Creve Coeur Airport
 Missouri Airport Investment Study

| | Existing | Minimum System Objective | Recommendation |
|----------------------------|------------------------------------|--|-----------------------|
| Airside Facilities | | | |
| Airport Reference Code | B-II | C-II | Upgrade Design System |
| Primary Runway Length | 4,500' | 5,500' | Extend RWY 1,500' |
| Primary Runway Width | 75' | 100' | Widen RWY 25' |
| Taxiway Type | Full Parallel | Full Parallel | None |
| Approach | Non-Precision | Non-Precision | None |
| Lighting | MIRL Reflectors | MIRL/MITL | Install MITL |
| NAVAIDS | Rotating Beacon | Rotating Beacon | None |
| | Lighted wind cone/segmented circle | Lighted wind cone/segmented circle | None |
| | REILs | REILs | None |
| | PAPIs | PAPIs | None |
| Weather | None | AWOS/ATCT | Install AWOS/ASOS |
| Landside Facilities | | | |
| Covered Storage | 121 spaces | 70% of based aircraft | 134 additional spaces |
| Aircraft Apron | 59 spaces | 30% of based aircraft plus an additional 75% for transient use | 323 additional spaces |
| Terminal/Admin Building | 16,000sq.ft. | 2,500 sq.ft. (incl. public restrooms, conference rooms and pilot lounge) | None |
| Auto Parking | 40 spaces | 1 space for each based aircraft | 496 additional spaces |
| Fuel | AvGas/Jet A | AvGas/Jet A | None |
| FBO | Full Service | Full Service | None |
| Maintenance | Limited Service | Full Service | None |
| Ground Transportation | Rental Car Available | Rental Car Available | None |
| Ground Communications | Public Phone | Public Phone and GCO | Install GCO |

Source: Missouri State Airport System Plan, 2006

Aviation Forecasts – Aircraft operations are forecast to grow steadily from 33,000 in 2002 to 53,100 by the year 2022 (61%) as shown in **Exhibit 5-5**. Based aircraft are also forecast to grow steadily from 331 in 2002 to 364 by 2022 (10%). The low annual operations per based aircraft ratio, approximately 100 operations/based aircraft in 2002, is forecast to rise to 146 operation/based aircraft by 2022.

Exhibit 5-5

Aviation Forecasts – Creve Coeur Airport
Missouri Airport Investment Study

| Activity Forecasts | 2002 | 2007 | 2012 | 2022 |
|----------------------------|--------------|---------------|---------------|---------------|
| Aircraft Operations | | | | |
| Local | 24,150 | 27,800 | 31,500 | 38,900 |
| Itinerant | <u>8,850</u> | <u>10,200</u> | <u>11,500</u> | <u>14,200</u> |
| Total | 33,000 | 38,000 | 43,000 | 53,100 |
| Based Aircraft | | | | |
| Single-Engine | 300 | 305 | 307 | 316 |
| Multi-Engine | 20 | 21 | 21 | 22 |
| Jet | 4 | 7 | 12 | 18 |
| Helicopter | 6 | 6 | 6 | 7 |
| Glider | 1 | 1 | 1 | 1 |
| Ultralight | <u>0</u> | <u>0</u> | <u>0</u> | <u>0</u> |
| Total | 331 | 340 | 347 | 364 |

Source: Missouri State Airport System Plan, 2006

Capital Development Costs – The recent 900-foot runway extension project in 2002/2003 cost \$3.3 million, and the apron expansion project in 2005 cost \$0.4 million. Combined, the recent development cost totaled \$3.7 million. Current capital development costs are estimated at \$2.3 million over the next five years and \$0.6 million over the ensuing 15-year period. Both recent and future development costs are summarized in **Exhibit 5-6**.

5.2. Regional Economy and Users

This section identifies countywide economic development and growth, as well as employment levels for typical firms that use/depend on GA airports. Specifically, the analysis focuses on those sectors considered most likely to use and/or benefit from GA airport improvements; namely tourism, business/convention, manufacturing and institutional sectors. Further, flight activity of major users who file flight plans are evaluated to identify major user firms, frequency, aircraft type and flight origin/destination data.

County Employment – Creve Coeur Airport is located in the western portion of St. Louis County, where a total of over 565,600 people are employed. Of these, approximately 196,700 (35%) work in the four key sectors that potentially rely on general aviation for the transport of people, equipment or goods. However, both the manufacturing and tourism sectors declined 6.5% annually between 1998 and 2003, while the business and institutional sectors rose annually (3.4% and 1.4%, respectively), as summarized in **Exhibit 5-7**.

Exhibit 5-6

Capital Development Costs – Creve Coeur Airport
Missouri Airport Investment Study

| Recent Development Projects | |
|---|--------------------|
| Extend Runway & Taxiway, Install Lighting, Relocate PAPI & REIL | \$3,307,900 |
| Expand Apron & Taxiway, Improve Entrance Road | <u>422,200</u> |
| Recent Development Costs | \$3,730,100 |
| Future Development Projects | |
| Short Term (5-Year) | |
| Extend T-Hangar Taxiway | \$316,300 |
| Construct T-Hangars | 437,500 |
| Expand Terminal Building | 375,000 |
| T-Hangar Pavement Maintenance | 655,500 |
| Land Acquisition for RPZ's (20 Acres) | <u>500,000</u> |
| <i>Short Term Subtotal</i> | \$2,284,300 |
| Long Term (20-Year) | |
| Update Airport Master Plan | \$100,000 |
| Install AWOS | 187,500 |
| Rehab/Mark Runway 16-34 Parallel Taxiway | <u>319,100</u> |
| <i>Short Term Subtotal</i> | \$606,600 |
| Total Future Development Costs | \$2,890,900 |

Source: Missouri State Airport System Plan, 2006

Exhibit 5-7

Employment Sector Growth – St. Louis County (Creve Coeur)
Missouri Airport Investment Study

| Industry Sector | | Employment | | Avg Annual Growth |
|------------------------|------------------|-------------------|----------------|--------------------------|
| Description | SIC Codes | 1998 | 2003 | |
| Key Sectors | | | | |
| Manufacturing | 20-39 | 94,497 | 67,675 | -6.5% |
| Business | 81, 87, 89 | 23,096 | 27,324 | 3.4% |
| Tourism | 70, 79 | 20,481 | 14,630 | -6.5% |
| Institutional | 80, 82 | <u>81,196</u> | <u>87,054</u> | 1.4% |
| Subtotal | | 219,270 | 196,683 | -2.2% |
| Other Sectors | | <u>343,017</u> | <u>368,905</u> | 1.5% |
| Total | | 562,287 | 565,588 | 0.1% |

Source: U.S. Bureau of the Census

Development and Growth – Results of the EDGE model, as shown below in **Exhibit 5-8** indicate that while several industries have growth potential in St. Louis County, all industries face high production costs relative to the rest of Missouri, which may explain the overall decline in the manufacturing sector employment. These high production costs primarily reflect high wages relative to the rest of Missouri. Conversely, a sufficient labor market exists with the necessary skills to fill employment demand in all industries.

Exhibit 5-8

Economic Development & Growth Evaluation Summary – St. Louis County (Creve Coeur)
Missouri Airport Investment Study

| SIC | Industry | Growth Potential | Competive Concerns | | SIC | Industry | Growth Potential | Competive Concerns | |
|-----|------------------------------------|------------------|--------------------|--------------|-----|-----------------------------------|------------------|--------------------|--------------|
| | | | Production Costs | Labor Market | | | | Production Costs | Labor Market |
| 7 | Agricultural services | | X | | 48 | Communications | | X | |
| 8 | Forestry | | X | | 49 | Electric, gas & sanitary services | X | X | |
| 9 | Fishing | | X | | 50 | Wholesale trade-durable goods | | X | |
| 10 | Metal mining | | X | | 51 | Wholesale trade - nondurables | | X | |
| 12 | Coal mining | | X | | 52 | Bldg materials & garden supplies | X | X | |
| 13 | Oil and gas extraction | X | X | | 53 | General merchandise | X | X | |
| 14 | Nonmetallic minerals, exc. fuels | | X | | 54 | Foods stores | X | X | |
| 15 | General contractors | X | X | | 55 | Auto dealers & service stations | X | X | |
| 16 | Heavy construction | X | X | | 56 | Apparel and accessory stores | | X | |
| 17 | Special trade contractors | X | X | | 57 | Furniture and home stores | X | X | |
| 20 | Food and kindred products | | X | | 58 | Eating and drinking estabs | X | X | |
| 21 | Tobacco products | | X | | 59 | Miscellaneous retail | X | X | |
| 22 | Textile mill products | | X | | 60 | Depository institutions | | X | |
| 23 | Apparel & other textile products | | X | | 61 | Nondepository institutions | | X | |
| 24 | Lumber and wood products | | X | | 62 | Security & commodity brokers | X | X | |
| 25 | Furniture and fixtures | | X | | 63 | Insurance carriers | X | X | |
| 26 | Paper and allied products | | X | | 64 | Insurance agents, services | X | X | |
| 27 | Printing and publishing | | X | | 65 | Real estate | | X | |
| 28 | Chemicals and allied products | | X | | 66 | Holding, investment offices | | X | |
| 29 | Petroleum and coal products | X | X | | 70 | Hotels and other lodging | X | X | |
| 30 | Rubber & misc. plastics products | | X | | 72 | Personal services | X | X | |
| 31 | Leather and leather products | | X | | 73 | Business services | X | X | |
| 32 | Stone, Clay, and glass products | | X | | 75 | Auto repair, services, parking | X | X | |
| 33 | Primary metal industries | | X | | 76 | Miscellaneous repair services | X | X | |
| 34 | Fabricated metal products | | X | | 78 | Motion pictures | X | X | |
| 35 | Industrial machinery and equip. | | X | | 79 | Amusements & recreation | X | X | |
| 36 | Electronic & other electric equip. | | X | | 80 | Health services | X | X | |
| 37 | Transportation equipment | | X | | 81 | Legal services | X | X | |
| 38 | Instruments & related products | | X | | 82 | Educational services | | X | |
| 39 | Mis. manufacturing industries | | X | | 83 | Social services | X | X | |
| 41 | Local & interurban pass. transit | | X | | 84 | Museums, botanical, zoos | | X | |
| 42 | Trucking and warehousing | X | X | | 86 | Membership organizations | X | X | |
| 44 | Water transportation | X | X | | 87 | Engineering & management | | X | |
| 45 | Transportation by air | X | X | | 89 | Other business services | X | X | |
| 46 | Pipelines, except natural gas | X | X | | 99 | Unclassified establishments | | X | |
| 47 | Transportation services | | X | | | | | X | |

Note: "xx" in the Labor Market indicates a major concern

Source: Wilbur Smith Associates

- Tourism
- Business Services
- Manufacturing
- Institutional

Potential Airport User Employment – Another source, InfoUSA, was used to obtain employment by firm in the region for firms with 20+ employees. Given the large metropolitan size of the region, hundreds of firms were initially identified. The database was further mined for Creve Coeur to reflect firms with 100+ employees and within approximately 10 miles of the airport. As expected the major concentration of airport potential users are located in the Earth City area along the I-70 corridor, as shown in **Exhibit 5-9** (next page). In addition, a smaller concentration of firms is located across the Missouri River in St. Charles County; these firms are also viewed as potential airport users. Another cluster of firms, located south of the airport along the U.S. 40 corridor, are roughly the same distance from the Spirit of St. Louis Airport.

Major Current Airport Users – A summary of major Creve Coeur Airport users, according to logged flight plans, is presented in **Exhibit 5-10**. The table indicates that Limb-A-Nator, based in St. Charles, MO, logged the most flight plans (54) through the airport; however, the airport manager was unfamiliar with the name and could not identify the user. The Piper aircraft used is representative of the other major users.¹⁸ The small nature of principal aircraft using the airport, the relatively few operations per based aircraft (OPBA), and discussions with the airport manager and community leaders all indicate that Creve Coeur Airport is a recreational-oriented Airport that primarily accommodates the aviation enthusiast.

Exhibit 5-10

Major Airport Users –Creve Coeur Airport
Missouri Airport Investment Study

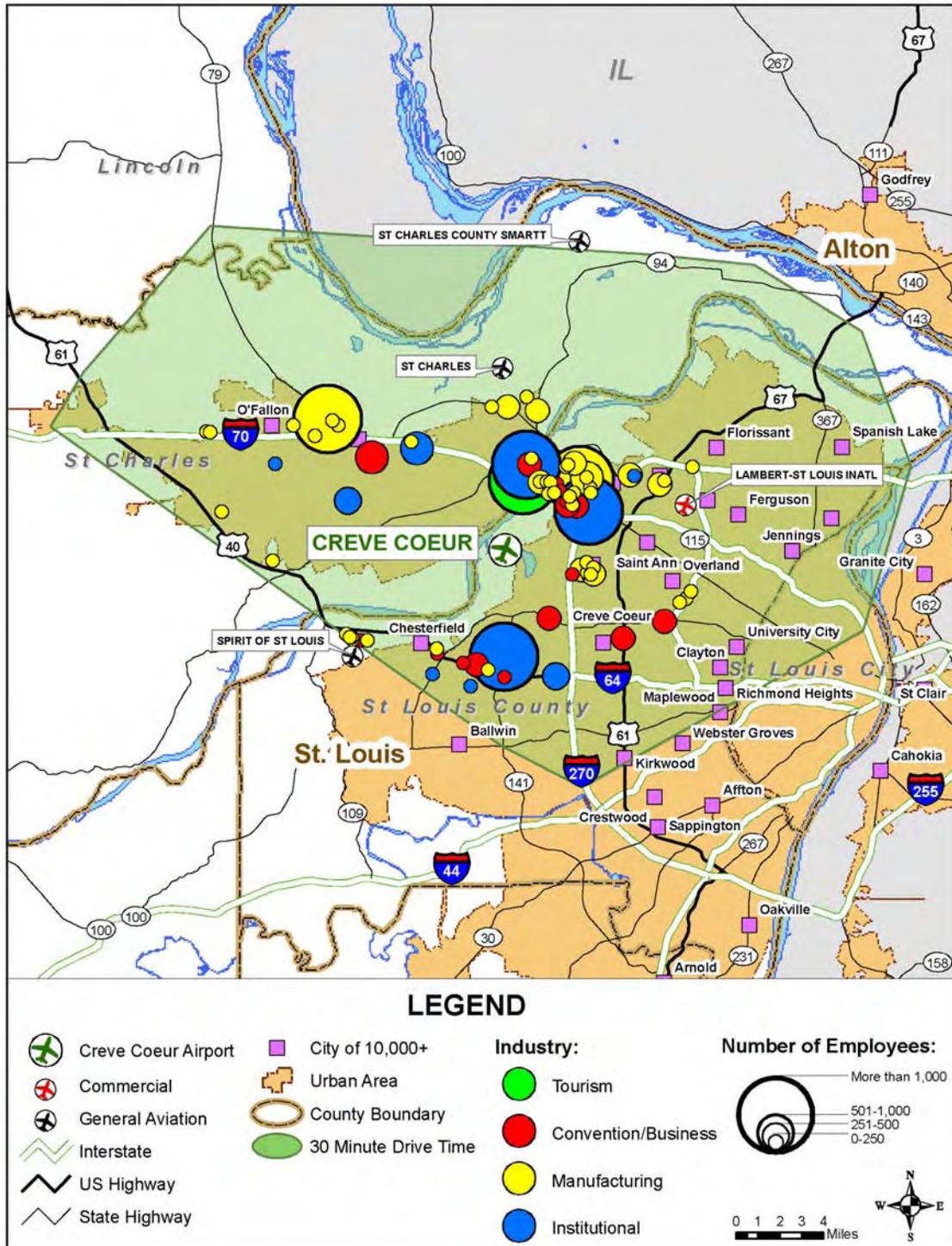
| Firm | Registered Location | | Aircraft Data | | | Annual Opers |
|------------------------|---------------------|-------|---------------|------------------|--------|--------------|
| | City | State | Tail # | Make/Model | Class | |
| Limb-A-Nator Llc | St Charles | MO | N2966X | PIPER PA-32-300 | PISTON | 54 |
| Aresti Associates LLC | Saint Louis | MO | N700SS | BEECH A36 | PISTON | 31 |
| Alseth Engineering LLC | Kirkwood | MO | N1341H | PIPER PA-28-181 | PISTON | 26 |
| Low, Daniel A | Creve Coeur | MO | N58144 | MOONEY M20J | PISTON | 25 |
| Grant, William M | Bolivar | MO | N20834 | CESSNA 172M | PISTON | 20 |
| Gasper, Tomas M | Champlin | MN | N9000L | MOONEY M20C | PISTON | 19 |
| MS Flying Inc | Monett | MO | N191JH | BEECH A36 | PISTON | 18 |
| Amys Aircraft | Bridgeton | MO | N16253 | PIPER PA-32-300 | PISTON | 15 |
| Parish Planes LLC | Tullahoma | TN | N404JP | BEECH C90 | TURBO | 12 |
| Annin, John A | St Charles | MO | N2739Y | BEECH 95 | PISTON | 11 |
| Trc Properties LLC | Phoenix | AZ | N1258Z | BEECH N35 | PISTON | 11 |
| Scheve, William J | Saint Louis | MO | N3724T | PIPER PA-28R-180 | PISTON | 10 |

Source: GCR & Associates

¹⁸ A full list of airport users who logged flight plans is presented in Appendix C.

Exhibit 5-9

Key Potential Airport User Firms by Industry Type – Creve Coeur Airport
Missouri Airport Investment Study



Source: Wilbur Smith Associates

5.3. Economic Development Impacts and ROI

The economic development impacts associated with airport improvements at Creve Coeur comprise a two-part answer. First, no significant economic development impacts associated with the recent capital improvements at Creve Coeur were identified; nor has the leisure/recreational nature of the airport changed. While the facility may be safer with the extension, there has not been a notable change to the local economy. Larger jets may occasionally bring additional visitors to the nearby casino, but the magnitude is small and irregular. For this reason, no discernible direct economic impacts resulting from the recent airport investments were identified.

Second, the region is in transition and is witnessing notable business growth in the manufacturing, business services and tourism sectors – all of which are potential users of a top tier GA airport. Further, the other major regional GA airport, Spirit of St. Louis, is extremely busy and could approach capacity over the 20-year analysis period. Depending on the type of land development around the airport (business versus residential) and the ability of the Spirit of St. Louis to accommodate additional business aviation demand, Creve Coeur may be the best facility to accommodate the rising demand for business aviation services in the northwest region of St. Louis.

To accommodate additional business aviation demand would probably require an additional 1,000'-1,500' runway extension, in addition to the AWOS system that pilots, reportedly, enquire about regularly. While such an expansion would notably change the character of the airport from recreational to more business-oriented, it does not suggest that the airport would evolve into another massive business facility like the Spirit of St. Louis. Rather, the potential is for the airport to evolve into more of a mixed-use airport similar in activity to present levels at Lee's Summit in Kansas City.

Since sufficient information is not available to specifically estimate economic development impacts associated with the CIP, a breakeven economic analysis is conducted to determine what level of annual impacts would be required for the \$3.3 million in recent airport development projects to recover its costs and 'break-even" over a 20-year period. A qualitative assessment is then made as to whether or not such benefits could be expected in light of the airports activity levels, facilities and surrounding economy.

Economic and Tax Impacts – The breakeven approach estimates the direct jobs required by the airport improvement to make the project feasible given a 12% discount rate over a 20-year analysis period. The approach estimates the resulting level of direct earnings and output based on an average of the industries considered to be the major potential airport users, as discussed above. Further, the state sales and income tax receipts include those resulting from both the direct and multiplier related impacts. Again, the average multipliers for those industries most likely to use the airport are used to estimate the multiplier impacts.

Future job growth is conservatively estimated at an annual rate of 2.4%, which reflects the forecasted annual operations growth. Based on these assumptions, the estimated direct

change in airport employment attributable to the runway improvements rises from 83 jobs in 2003 to 136 jobs in 2021, as shown in **Exhibit 5-11**. These employment levels drive the ensuing impact and ROI estimates.

Exhibit 5-11
Direct Job Impact Requirements – Creve Coeur Runway Extension
 Missouri Airport Investment Study

| Project Year | Calendar Year | Direct Jobs | Project Year | Calendar Year | Direct Jobs |
|--------------|---------------|-------------|--------------|---------------|-------------|
| 1 | 2002 | 0 | 11 | 2012 | 114 |
| 2 | 2003 | 83 | 12 | 2013 | 116 |
| 3 | 2004 | 86 | 13 | 2014 | 118 |
| 4 | 2005 | 89 | 14 | 2015 | 120 |
| 5 | 2006 | 92 | 15 | 2016 | 122 |
| 6 | 2007 | 96 | 16 | 2017 | 124 |
| 7 | 2008 | 100 | 17 | 2018 | 126 |
| 8 | 2009 | 104 | 18 | 2019 | 128 |
| 9 | 2010 | 108 | 19 | 2020 | 131 |
| 10 | 2011 | 112 | 20 | 2021 | 136 |

Source: Wilbur Smith Associates

If the 83 direct jobs in 2003 were attracted to the region due to the runway extension, an additional 112 multiplier related jobs would be attracted to the area.¹⁹ Based on these assumptions, the total impacts for three benchmark years (2003, 2011, and 2021) are summarized in **Exhibit 5-12**, which suggests that the total jobs would rise from 209 jobs in 2003 to 343 jobs by 2024. **It is doubtful that the runway extension will generate such job impacts given its current activity level and role within the state’s aviation system.** Nonetheless, such economic activity levels would generate an estimated \$419,200 in state income and sales tax receipts in 2003 and \$687,900 in 2021.

State Tax Impacts and ROI – Based on these hypothetical tax impacts, the project would “breakeven” with a marginal NPV of \$1,000, an IRR of 12% and a B/C ratio of 1.00, as shown in **Exhibit 5-13**. The calculation includes the total cost of the capital improvements, an annual increase in operating costs, and no residual value.²⁰

It is important to note the 12% discount rate is high; in fact it is often debated that government projects should use a lower rate of 4%. In this case, doing so, would suggest that the attraction of only 50 direct jobs in 2003 would make the project feasible versus the 83 jobs in the detailed analysis.

¹⁹ Multiplier impacts based on an average of IMPLAN multipliers for potential user firms.

²⁰ Operating costs estimated at 2.5% of the capital cost; residual value assumes a 20-year project life.

Exhibit 5-12
Breakeven Economic Impact and Tax Collections – Creve Coeur Runway Extension
 Missouri Airport Investment Study

| | 2003 | 2011 | 2021 |
|-------------------------|----------------|----------------|----------------|
| Economic Impacts | | | |
| Direct | | | |
| Jobs | 83 | 112 | 136 |
| Earnings | \$3,286,800 | \$4,435,200 | \$5,385,600 |
| Output | \$10,781,700 | \$14,548,800 | \$17,666,400 |
| Multiplier | | | |
| Jobs | 126 | 170 | 207 |
| Earnings | \$3,931,200 | \$5,304,000 | \$6,458,400 |
| Output | \$7,572,600 | \$10,217,000 | \$12,440,700 |
| Total | | | |
| Jobs | 209 | 282 | 343 |
| Earnings | \$7,218,000 | \$9,739,200 | \$11,844,000 |
| Output | \$18,354,300 | \$24,765,800 | \$30,107,100 |
| Tax Collections | | | |
| State Income Tax | \$158,800 | \$214,300 | \$260,600 |
| State Sales Tax | <u>260,400</u> | <u>351,400</u> | <u>427,300</u> |
| Total State Taxes | \$419,200 | \$565,700 | \$687,900 |

Source: Wilbur Smith Associates

Exhibit 5-13
Breakeven Return on Investment - Creve Coeur Runway Extension
 Missouri Airport Investment Study

| Proj Year | Cain Year | Airport Improvement Costs | | | Economic Development Tax Impacts | | | Present Worth Factor | Discounted Totals | | | |
|-----------|-----------|---------------------------|--------------|-------------|----------------------------------|-------------|----------|----------------------|-------------------|-------------|--------------|------------|
| | | Capital | Ops & Maint. | Total | Income Tax | Sales Tax | Residual | | Total | Costs | Benefits | Net Change |
| 0 | 2001 | -- | -- | -- | -- | -- | -- | 1.0000 | 1,946,700 | 0 | -- | -- |
| 1 | 2002 | \$1,946,700 | -- | 1,946,700 | -- | -- | -- | 0.8929 | 1,289,200 | 374,300 | 0 | -1,946,700 |
| 2 | 2003 | 1,361,200 | 82,700 | 1,443,900 | 158,800 | \$260,400 | -- | 0.7972 | 65,900 | 345,500 | 1,289,200 | -914,900 |
| 3 | 2004 | -- | 82,700 | 82,700 | 164,200 | \$269,200 | -- | 0.7118 | 58,900 | 318,500 | 433,400 | 279,600 |
| 4 | 2005 | -- | 82,700 | 82,700 | 169,500 | \$278,000 | -- | 0.6355 | 46,900 | 294,600 | 447,500 | 259,600 |
| 5 | 2006 | -- | 82,700 | 82,700 | 175,600 | \$287,900 | -- | 0.5674 | 29,800 | 204,000 | 463,500 | 242,000 |
| 6 | 2007 | -- | 82,700 | 82,700 | 182,500 | \$299,300 | -- | 0.5066 | 26,600 | 185,400 | 481,800 | 226,500 |
| 7 | 2008 | -- | 82,700 | 82,700 | 189,400 | \$310,600 | -- | 0.4523 | 23,800 | 168,400 | 500,000 | 211,400 |
| 8 | 2009 | -- | 82,700 | 82,700 | 196,300 | \$322,000 | -- | 0.4039 | 21,200 | 153,400 | 518,300 | 197,100 |
| 9 | 2010 | -- | 82,700 | 82,700 | 203,200 | \$333,300 | -- | 0.3606 | 19,000 | 140,000 | 536,500 | 183,300 |
| 10 | 2011 | -- | 82,700 | 82,700 | 214,300 | \$351,400 | -- | 0.3220 | 16,900 | 127,100 | 565,700 | 174,200 |
| 11 | 2012 | -- | 82,700 | 82,700 | 218,100 | \$357,600 | -- | 0.2875 | 15,100 | 115,700 | 575,700 | 158,800 |
| 12 | 2013 | -- | 82,700 | 82,700 | 221,900 | \$363,900 | -- | 0.2567 | 13,500 | 105,200 | 585,800 | 144,600 |
| 13 | 2014 | -- | 82,700 | 82,700 | 226,400 | \$371,200 | -- | 0.2292 | 12,000 | 95,700 | 597,600 | 132,200 |
| 14 | 2015 | -- | 82,700 | 82,700 | 230,800 | \$378,600 | -- | 0.2046 | 10,800 | 87,300 | 609,400 | 120,700 |
| 15 | 2016 | -- | 82,700 | 82,700 | 235,300 | \$386,000 | -- | 0.1827 | 9,600 | 79,900 | 621,300 | 110,200 |
| 16 | 2017 | -- | 82,700 | 82,700 | 239,800 | \$393,300 | -- | 0.1631 | 8,700 | 76,500 | 633,100 | 100,600 |
| 17 | 2018 | -- | 82,700 | 82,700 | 244,300 | \$400,700 | -- | 0.1456 | 8,000 | 73,000 | 645,000 | 91,700 |
| 18 | 2019 | -- | 82,700 | 82,700 | 248,800 | \$408,000 | -- | 0.1300 | 7,500 | 70,000 | 656,800 | 83,700 |
| 19 | 2020 | -- | 82,700 | 82,700 | 254,200 | \$416,800 | -- | 0.1161 | 7,000 | 67,000 | 671,000 | 76,500 |
| 20 | 2021 | -- | 82,700 | 82,700 | 260,600 | \$427,300 | -- | | 6,600 | 64,000 | 687,900 | 70,300 |
| Totals | | \$3,307,900 | \$1,571,300 | \$4,879,200 | \$4,034,000 | \$6,615,500 | \$0 | | \$3,771,200 | \$3,772,600 | \$10,649,500 | \$1,400 |

Source: Wilbur Smith Associates

| | |
|---------------|---------|
| Discount Rate | 12% |
| NPV | \$1,000 |
| IRR | 12.0% |
| B/C Ratio | 1.00 |

Section 6:

Eldon Model Airpark – Case Study

6. Eldon Model Airpark – Case Study

This section provides a case study return on investment (ROI) analysis for the Eldon Model Airpark in which potential state tax revenues associated with the economic development impacts are compared to the capital improvement project costs. The section begins with a review of the airport's location and infrastructure, followed by an analysis of the regional economy and major users. The information provides a means to compare the regional economic needs with the existing and planned airport infrastructure, and thereby gauge the resulting economic development impacts associated with airport development.

6.1. Airport Location and Infrastructure

Eldon is a small city, with a population of about 1,000 and a modest manufacturing sector. On the northeastern edge of the rapidly expanding Lake of the Ozarks, and south of Jefferson City, the region around Eldon has the potential to grow notably. The following subsections summarize airport characteristics, activity and future needs.

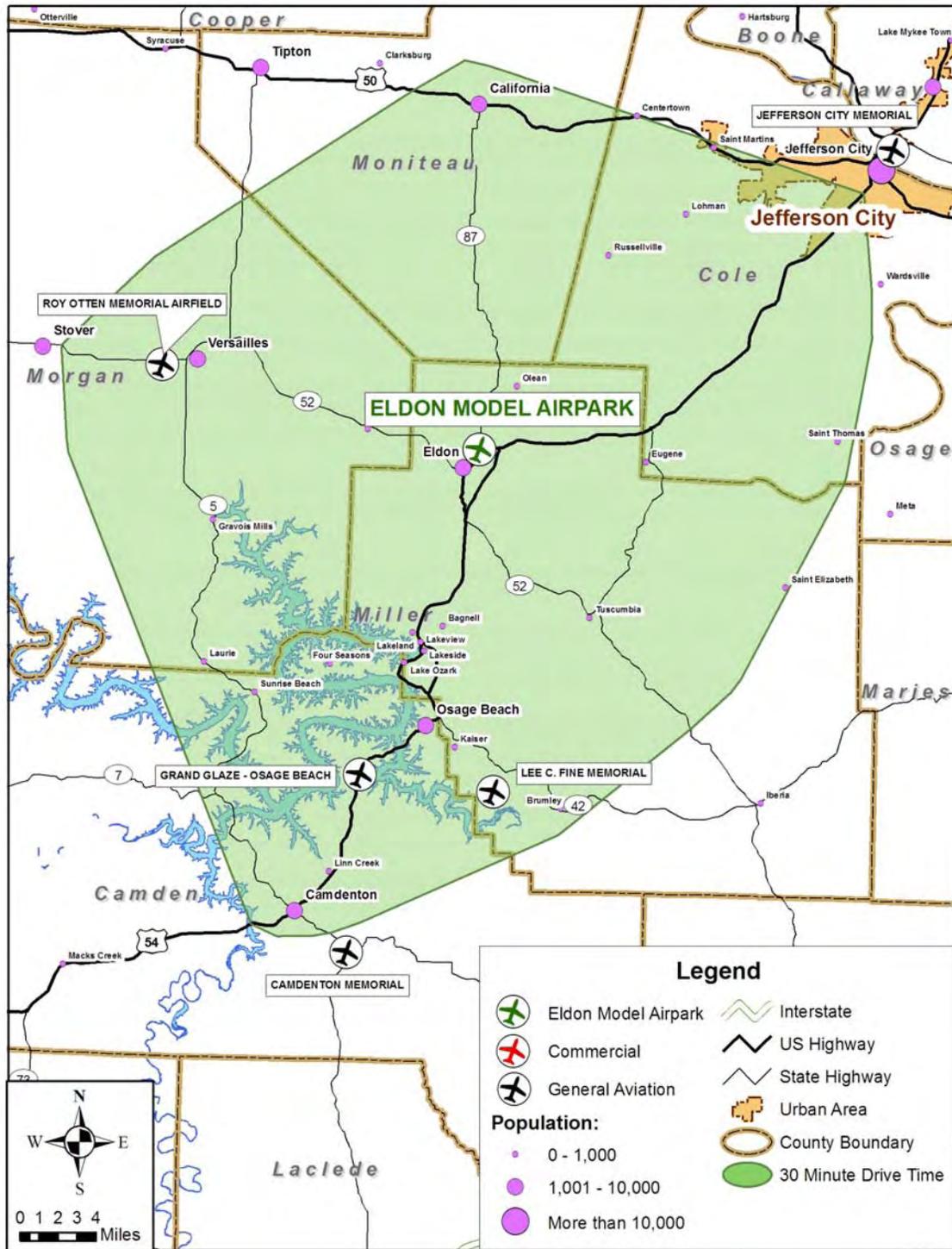
Airport Location/Access – Eldon Model Airpark is approximately one mile northeast of the City of Eldon in Miller County, as shown in **Exhibit 6-1**. Good highway access is provided via U.S. Highway 54, a major two-lane road. In addition, the map also indicates that five other airports are located in the region, three of which are within a 30-minute drive time of the airport. The primary runway facilities, total based aircraft and total aircraft operations for each are summarized in **Exhibit 6-2**.

Airport Facilities – Eldon Model Airpark is classified as a Business Airport with a single 3,300-foot long runway, Runway 18/36. The minimum system objective is to extend the primary runway to 4,000 feet. Discussions with the airport manager and City officials indicate that the runway extension is a key component to the community's ability to attract new industry, and possibly even to retain existing industry. Existing, minimum objective and recommended facilities are summarized in **Exhibit 6-3**.

Aviation Forecasts – Aircraft operations in 2002 totaled 7,550 and are forecast to grow steadily from 7,550 to 12,100 by 2022 (60%) as shown in **Exhibit 6-4**. Based aircraft totaled 37 in 2002 and are also forecast to grow steadily to 44 by 2022 (19%). The average annual operations per based aircraft ratio, approximately 204 operations/based aircraft in 2002, is forecast to rise to 275 operations per based aircraft by 2022.

Capital Development Costs – The short-term 5-year capital improvement projects, which include a 998-foot long runway extension, is budgeted at a cost of \$2.6 million. An additional \$1.5 million is anticipated for an apron expansion and full-taxiway construction in the long-term (between years 5 and 20). Including the short and long-term developments, the total 20-year project costs are estimated at \$4.1 million, as shown in **Exhibit 6-5**.

Exhibit 6-1
Airport Location and Drive Time – Eldon Model Airpark
 Missouri Airport Investment Study



Source: Wilbur Smith Associates

Exhibit 6-2
Regional Airport Facilities – Eldon Model Airpark
 Missouri Airport Investment Study

| Airport | Commercial | Primary Runway | | Based | Aircraft |
|----------------------------|------------|----------------|------------|-----------|--------------|
| | Service | Length | Width | Aircraft | Operations |
| Eldon Model Airpark | N | 3,300' | 75' | 37 | 7,550 |
| Camdenton Mem. | N | 4,000 | 75 | 26 | 10,000 |
| Gran Glaze - Osage Beach | N | 3,205 | 60 | 25 | 8,000 |
| Jefferson City Mem. | N | 6,001 | 100 | 58 | 41,178 |
| Lee C. Fine Mem. | N | 6,497 | 100 | 2 | 7,320 |
| Roy Otten Mem. Airfield | N | 2,805 | 39 | 26 | 5,500 |

Source: Missouri State Airport System Plan, 2006

Exhibit 6-3
Airport Facilities and Services – Eldon Model Airpark
 Missouri Airport Investment Study

| | Existing | Minimum System Objective | Recommendation |
|----------------------------|--|--|------------------------------------|
| Airside Facilities | | | |
| Airport Reference Code | B-I | B-II | Upgrade ARC Standards |
| Primary Runway Length | 3,300' | 4,000' | Extend RWY 700' |
| Primary Runway Width | 60' | 75' | |
| Taxiway Type | Turnaround | Turnaround on each rwy end | None |
| Approach | Non-Precession | Non-Precession | None |
| Lighting | LIRL/MITL | MIRL/Reflectors | Upgrade LIRL to MIRL |
| NAVAIDS | Rotating Beacon | Rotating Beacon | None |
| | Lighted wind cone/ segmented circle | Lighted wind cone/ segmented circle | None |
| Weather | None | None | None |
| Landside Facilities | | | |
| Covered Storage | 26 spaces | 60% of based aircraft | None |
| Aircraft Apron | 6 spaces | 40% of based aircraft plus an additional 25% for transient use | Provide 17 additional apron spaces |
| Terminal/Admin Building | 6,375 sq.ft. | 1,500 sq.ft. (incl. public restrooms, conference rooms and pilot lounge) | None |
| Auto Parking | 8 spaces | 1 space for each based aircraft plus 25% for employee/visitors | Provide 36 additional auto spaces |
| Fuel | AvGas | AvGas | None |
| FBO | Full Service | Full Service | None |
| Maintenance | Limited Service | Limited Service | None |
| Ground Transportation | Rental Car Available | Loaner Car Available | None |
| Ground Communications | Public Phone | Public Phone | None |

Source: Missouri State Airport System Plan, 2006

Exhibit 6-4
Aviation Forecasts – Eldon Model Airpark
 Missouri Airport Investment Study

| Activity Forecasts | 2002 | 2007 | 2012 | 2022 |
|----------------------------|--------------|--------------|--------------|--------------|
| Aircraft Operations | | | | |
| Local | 2,645 | 3,000 | 3,400 | 4,200 |
| Itinerant | <u>4,905</u> | <u>5,700</u> | <u>6,400</u> | <u>7,900</u> |
| Total | 7,550 | 8,700 | 9,800 | 12,100 |
| Based Aircraft | | | | |
| Single-Engine | 30 | 32 | 33 | 36 |
| Multi-Engine | 3 | 3 | 3 | 4 |
| Jet | 2 | 2 | 2 | 2 |
| Helicopter | 0 | 0 | 0 | 0 |
| Glider | 0 | 0 | 0 | 0 |
| Ultralight | <u>2</u> | <u>2</u> | <u>2</u> | <u>2</u> |
| Total | 37 | 39 | 40 | 44 |

Source: Missouri State Airport System Plan, 2006

Exhibit 6-5
Capital Development Costs – Eldon Model Airpark
 Missouri Airport Investment Study

| | |
|--|--------------------|
| Short Term (5-Year) | |
| Extend Runway 18-36 to 4,000' x 75' | 668,500 |
| T-Hangar Pavement Maintenance | 98,800 |
| Construct Aircraft Turnaround | 166,200 |
| Relocate REILs | 24,400 |
| Land Acquisition for Runway Extension (50 Acres) | 625,000 |
| Construct Partial Parallel Taxiway | 422,200 |
| Conduct Environmental Assessment | 50,000 |
| FAA 405 Survey | 18,800 |
| Construct Hangar Access Taxiways | 277,500 |
| Construct T-Hangar Taxiways | <u>243,500</u> |
| <i>Short Term Subtotal</i> | <i>\$2,594,900</i> |
| Long Term (20-Year) | |
| Conduct Airport Master Plan Update | 100,000 |
| Apron Expansion | 312,500 |
| Construct Full Parallel Taxiway | 957,600 |
| Install Perimeter Fencing (EG Access Control) | <u>118,500</u> |
| <i>Long Term Subtotal</i> | <i>\$1,488,600</i> |
| Total Development Costs | \$4,083,500 |

Source: Missouri State Airport System Plan, 2006

6.2. Regional Economy and Users

This section identifies countywide economic development and growth, as well as employment levels for typical firms that use/depend on GA airports. Specifically, the analysis focuses on those sectors considered most likely to use and/or benefit from GA airport improvements; namely tourism, business/convention, manufacturing and institutional sectors. Further, flight activity of major users who file flight plans are evaluated to identify major user firms, frequency, aircraft type and flight origin/destination data.

County Employment – Eldon Model Airpark is located in Miller County, where approximately 12,900 people are employed. Of these, approximately 5,400 (42%) work in the four key sectors that potentially rely on general aviation for the transport of people, equipment or goods. However, both the manufacturing and tourism sectors declined significantly between 1998 and 2003, while the business and institutional sectors rose significantly, as summarized below in **Exhibit 6-6**. These results suggest significant changes are occurring to the local economy.

Exhibit 6-6

Employment Sector Growth – Miller County (Eldon Model)

Missouri Airport Investment Study

| Industry Sector | | Employment | | Avg Annual Growth |
|----------------------|------------|--------------|--------------|-------------------|
| Description | SIC Codes | 1998 | 2003 | |
| Key Sectors | | | | |
| Manufacturing | 20-39 | 3,198 | 1,153 | -18.5% |
| Business | 81, 87, 89 | 611 | 2,826 | 35.8% |
| Tourism | 70, 79 | 915 | 407 | -15.0% |
| Institutional | 80, 82 | <u>602</u> | <u>1,051</u> | 11.8% |
| Subtotal | | 5,326 | 5,437 | 0.4% |
| Other Sectors | | | | |
| | | <u>6,335</u> | <u>7,503</u> | 3.4% |
| Total | | 11,661 | 12,940 | 2.1% |

Source: U.S. Bureau of the Census

Development and Growth – The EDGE analysis highlights the growth potential versus the competitive concerns regarding production costs and labor market for one of the region’s major employers. Results of the EDGE analysis, as shown in **Exhibit 6-7**, indicate that none of the manufacturing industries appear to have notable growth potential, nor do they indicate any growth concerns in terms of production costs or labor market. The only sector indicating notable growth potential is the lodging sector. Conversely, labor market concerns arose in the health and legal services sectors, which may constrain development. While the employment analysis does not suggest any major growth, Eldon’s location between Jefferson City and Lake of the Ozarks does suggest growth potential.

Exhibit 6-7

Economic Development & Growth Summary – Miller County (Eldon Model)
Missouri Airport Investment Study

| SIC | Industry | Growth Potential | Competive Concerns | | SIC | Industry | Growth Potential | Competive Concerns | |
|-----|------------------------------------|------------------|--------------------|--------------|-----|-----------------------------------|------------------|--------------------|--------------|
| | | | Production Costs | Labor Market | | | | Production Costs | Labor Market |
| 7 | Agricultural services | | | | 48 | Communications | | | |
| 8 | Forestry | | | | 49 | Electric, gas & sanitary services | | | X |
| 9 | Fishing | | | | 50 | Wholesale trade-durable goods | X | X | XX |
| 10 | Metal mining | X | | | 51 | Wholesale trade - nondurables | | | |
| 12 | Coal mining | | | | 52 | Bldg materials & garden supplies | | | |
| 13 | Oil and gas extraction | | | | 53 | General merchandise | X | | X |
| 14 | Nonmetallic minerals, exc. fuels | | | | 54 | Foods stores | X | | X |
| 15 | General contractors | | | | 55 | Auto dealers & service stations | X | | X |
| 16 | Heavy construction | X | | X | 56 | Apparel and accessory stores | X | | X |
| 17 | Special trade contractors | X | | | 57 | Furniture and home stores | | | |
| 20 | Food and kindred products | | | | 58 | Eating and drinking estabs | X | | |
| 21 | Tobacco products | | | | 59 | Miscellaneous retail | X | | X |
| 22 | Textile mill products | | | | 60 | Depository institutions | | | |
| 23 | Apparel & other textile products | | | | 61 | Nondepository institutions | | | |
| 24 | Lumber and wood products | | | | 62 | Security & commodity brokers | | | |
| 25 | Furniture and fixtures | | | | 63 | Insurance carriers | | X | XX |
| 26 | Paper and allied products | | | | 64 | Insurance agents, services | X | | XX |
| 27 | Printing and publishing | | | | 65 | Real estate | | | |
| 28 | Chemicals and allied products | | | | 66 | Holding, investment offices | | | |
| 29 | Petroleum and coal products | | | | 70 | Hotels and other lodging | X | X | |
| 30 | Rubber & misc. plastics products | | | | 72 | Personal services | X | | |
| 31 | Leather and leather products | | | | 73 | Business services | | | |
| 32 | Stone, Clay, and glass products | | | | 75 | Auto repair, services, parking | X | X | |
| 33 | Primary metal industries | | | | 76 | Miscellaneous repair services | X | X | |
| 34 | Fabricated metal products | | | | 78 | Motion pictures | | | |
| 35 | Industrial machinery and equip. | | | | 79 | Amusements & recreation | | | |
| 36 | Electronic & other electric equip. | | | | 80 | Health services | X | | X |
| 37 | Transportation equipment | | | | 81 | Legal services | X | | XX |
| 38 | Instruments & related products | | | | 82 | Educational services | | | |
| 39 | Mis. manufacturing industries | | | | 83 | Social services | X | | X |
| 41 | Local & interurban pass. transit | | | | 84 | Museums, botanical, zoos | | | |
| 42 | Trucking and warehousing | | | | 86 | Membership organizations | X | | X |
| 44 | Water transportation | | | | 87 | Engineering & management | | | |
| 45 | Transportation by air | | | | 89 | Services, other | X | | |
| 46 | Pipelines, except natural gas | | | | 99 | Unclassified establishments | | | |
| 47 | Transportation services | | | | | | | | |

Note: "xx" in the Labor Market indicates a major concern

Source: Wilbur Smith Associates

- Tourism
- Business Services
- Manufacturing
- Institutional

Potential Airport User Employment – Another source, InfoUSA, was used to obtain employment by firm in the region for firms with 20+ employees. Given the rural nature of the region, only about 30 firms were identified as potential users, however, these firms include major manufacturers who employ approximately 4,400 people with regional sales revenues of \$620 million (see Appendix B). The location and size of these firms relative to Eldon and the other regional airports is shown by major industry type in **Exhibit 6-8** (next page). In addition, a few other firms mentioned by the airport manager and local community leaders operate manufacturing facilities in the region who either occasionally use the airport or would use the airport if it had expanded facilities (i.e., a longer runway).

Major Current Airport Users – A summary of major Eldon Model Airpark users, according to logged flight plans, is presented in **Exhibit 6-9**. The table indicates that three local area firms regularly use the airport (i.e., at least once per week), two of which fly turbo-prop aircraft.²¹ Discussions with the airport manager and local community leaders indicate that one of these users, Health Systems, Inc., seriously considered locating a small corporate office close to the airport for its retirement home business.

Exhibit 6-9

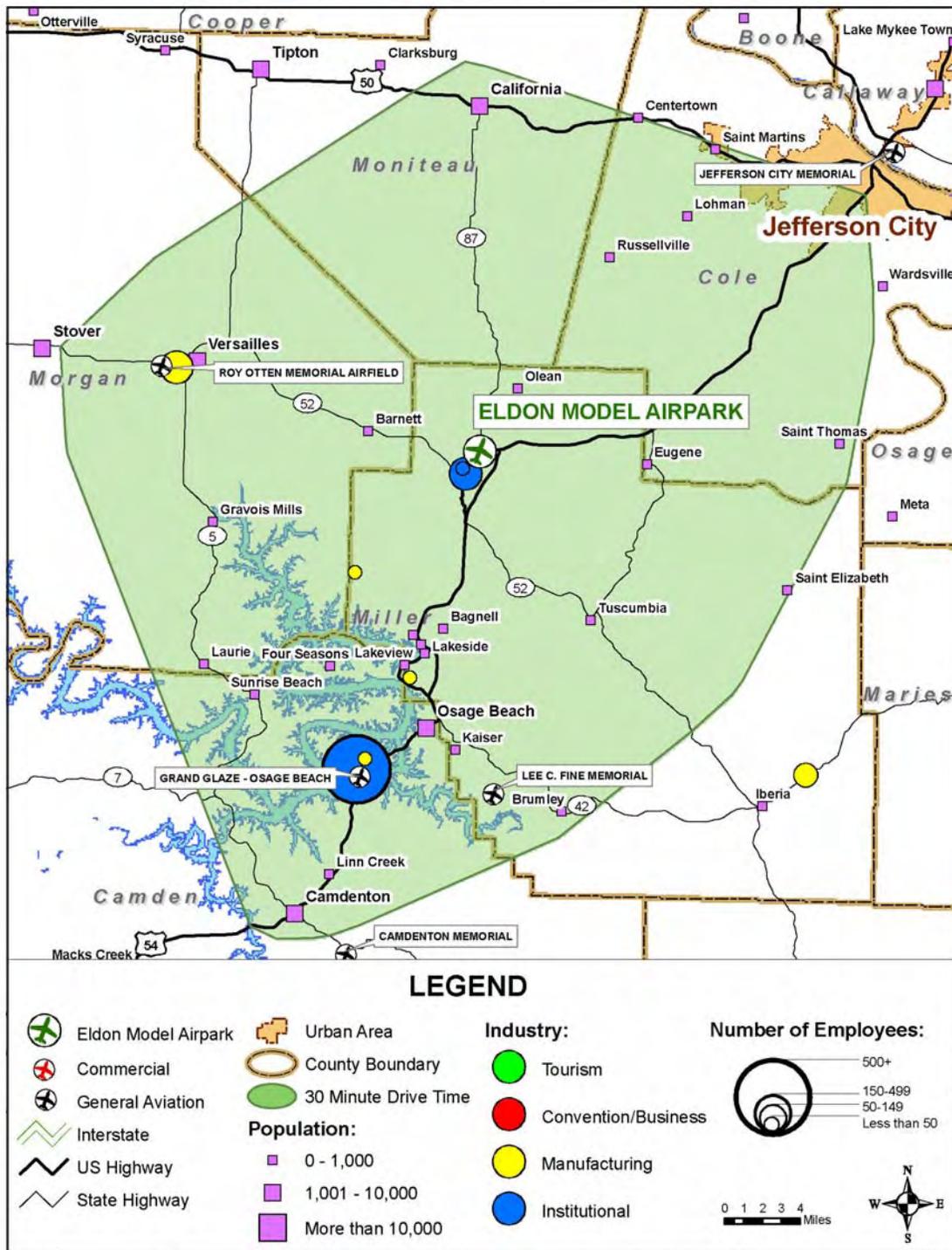
Major Airport Users – Eldon Model Airpark
Missouri Airport Investment Study

| Firm/Person | Registered Location | | | Aircraft Data | | Annual Ops |
|------------------------|---------------------|-------|--------|------------------|--------|------------|
| | City | State | Tail # | Make/Model | Class | |
| Perkin Holding Co. Inc | Rocky Mount | MO | N5319K | Piper PA46-500TP | Piston | 80 |
| Health Systems Inc | Sikeston | MO | N402JL | Raytheon B300 | Turbo | 77 |
| Bott Radio Network Inc | Gravois Mills | MO | N580S | Beech B100 | Turbo | 61 |
| Miller Fredrick E | Ames | IA | N4798P | Cessna P210N | Piston | 44 |
| Rene Investments Llc | Shawnee | OK | N8851K | Cessna 414A | Piston | 39 |

²¹ A full list of airport users who logged flight plans is presented in Appendix C.

Exhibit 6-8

Key Potential Airport User Firms by Industry Type – Eldon Model Airpark
Missouri Airport Investment Study



Source: Wilbur Smith Associates analysis of InfoUSA data

6.3. Economic Development Impacts and ROI

Economic development impacts associated with airport improvements at Eldon may or may not arise. Like Monett, the rural nature of the community makes it easier to identify when an airport improvement is the deciding factor in a firm's decision to either remain, expand or locate in the region compared to urban environments where several other factors play a significant role. In the case of Eldon, a major current user wanted to locate a small corporate office in the region because of the other amenities offered, most notably close Lake of the Ozarks access. Such decisions by small to medium-sized firms (especially privately-owned) are common. Lack of sufficient runway length may have resulted in a missed opportunity, although the potential exists of possibly relocating the facility sometime in the future after the runway extension is completed.

In addition, two automotive part/component manufactures, Fast Co Motors and Keiper Limited, Inc. currently employ between 800-1,000 people locally. Discussions with the airport manager/community leaders indicate the potential of both firms to expand notably. The runway expansion is seen as a factor that would broaden the firms' options for transporting critical just-in-time products, machine parts or personnel. In an increasingly competitive industry, such as automotive manufacturing, small incremental factors can potentially become a critical factor.

Since sufficient information is not available to specifically estimate economic development impacts associated with the CIP, a breakeven economic analysis is conducted to determine what level of annual impacts would be required for the \$2.6 million short-term airport development projects (including the runway extension and associated taxiway improvements) to recover the costs and "break-even" over a 20-year period. A qualitative assessment is then made as to whether such benefits could be expected in light of the airport's activity levels, facilities and surrounding economy. The analysis assumes the capital improvements are undertaken in 2007 and that the benefits ensue the following year.

Economic and Tax Impacts – The breakeven-approach estimates the direct jobs required by the airport improvement to make the project feasible given a 12% discount rate over a 20-year analysis period. The approach estimates the resulting level of direct earnings and output based on an average of the industries considered to be the major potential airport users, as discussed above. Further, the state sales and income tax receipts include those resulting from both the direct and multiplier related impacts. Again, the average multipliers for those industries most likely to use the airport are used to estimate the multiplier impacts.

Future job growth is conservatively estimated at an annual rate of 2.4%, which reflects the forecasted annual operations growth. Based on these assumptions, the estimated direct change in airport employment attributable to the runway improvements rises from 74 jobs in 2008 to 113 jobs in 2026, as shown in **Exhibit 6-10**. These annual employment requirements drive the ensuing impact and ROI estimates.

Exhibit 6-10
Direct Job Impact Requirements – Eldon Runway Extension
 Missouri Airport Investment Study

| Project Year | Calendar Year | Direct Jobs | Project Year | Calendar Year | Direct Jobs |
|--------------|---------------|-------------|--------------|---------------|-------------|
| 1 | 2007 | 0 | 11 | 2017 | 91 |
| 2 | 2008 | 74 | 12 | 2018 | 94 |
| 3 | 2009 | 76 | 13 | 2019 | 96 |
| 4 | 2010 | 77 | 14 | 2020 | 98 |
| 5 | 2011 | 79 | 15 | 2021 | 101 |
| 6 | 2012 | 81 | 16 | 2022 | 103 |
| 7 | 2013 | 83 | 17 | 2023 | 105 |
| 8 | 2014 | 85 | 18 | 2024 | 108 |
| 9 | 2015 | 87 | 19 | 2025 | 111 |
| 10 | 2016 | 89 | 20 | 2026 | 113 |

Source: Wilbur Smith Associates

If the 74 direct jobs in 2008 are attracted to the region due to the runway extension, an additional estimated 112 multiplier related jobs would be attracted to the area.²² Based on these assumptions, the total impacts for three benchmark years (2008, 2016, and 2026) are summarized in **Exhibit 6-11**, which suggests that the total jobs would rise from 186 jobs (74 direct and 112 multiplier) in 2008 to 285 jobs by 2026. Such economic activity levels would generate an estimated \$369,600 in state income and sales tax receipts in 2008 and \$564,400 in 2021.

Given the unique location of Eldon between the State Capital and the Lake of the Ozarks and its established automotive-part manufacturing sector, it is reasonable to envision that the runway extension will generate direct job impacts in the range of 75+. The employment level of the proposed Health Care headquarter facility was estimated at 60 jobs, which in and of itself would nearly generate sufficient state income and sales tax revenues to warrant the investment.

State Tax Impacts and ROI – Based on these hypothetical tax impacts, the project would “breakeven” with a marginal NPV of \$7,200, an IRR of 12% and a B/C ratio of 1.00, as shown in **Exhibit 6-12**. The calculation includes the total cost of the capital improvements, an annual increase in operating costs, and no residual value.²³

It is important to note the 12% discount rate is high; in fact it is often debated that government projects should use a lower rate of 4%. In this case doing so, would suggest that the attraction of only 45 direct jobs in 2008 would make the project feasible, versus the 74 jobs in the detailed analysis.

²² Multiplier impacts based on an average of IMPLAN multipliers for potential user firms.

²³ Operating costs estimated at 2.5% of the capital cost; residual value assumes a 20-year project life.

Exhibit 6-11
Breakeven Economic Impact and Tax Collections – Eldon Runway Extension
 Missouri Airport Investment Study

| | 2008 | 2016 | 2026 |
|-------------------------|----------------|----------------|----------------|
| Economic Impacts | | | |
| Direct | | | |
| Jobs | 74 | 89 | 113 |
| Earnings | \$2,893,400 | \$3,479,900 | \$4,418,300 |
| Output | \$9,560,800 | \$11,498,800 | \$14,599,600 |
| Multiplier | | | |
| Jobs | 112 | 135 | 172 |
| Earnings | \$3,469,500 | \$4,172,700 | \$5,298,000 |
| Output | \$6,739,200 | \$8,101,200 | \$10,300,400 |
| Total | | | |
| Jobs | 186 | 224 | 285 |
| Earnings | \$6,362,900 | \$7,652,600 | \$9,716,300 |
| Output | \$16,300,000 | \$19,600,000 | \$24,900,000 |
| Tax Collections | | | |
| State Income Tax | \$140,000 | \$168,400 | \$213,800 |
| State Sales Tax | <u>229,600</u> | <u>276,100</u> | <u>350,600</u> |
| Total State Taxes | \$369,600 | \$444,500 | \$564,400 |

Source: Wilbur Smith Associates

**Exhibit 6-12
Breakeven Return on Investment - Eldon Runway Extension
Missouri Airport Investment Study**

| Proj Year | Cah Year | Airport Improvement Costs | | | Economic Development Tax Impacts | | | Present Worth Factor | | | Discounted Totals | | |
|-----------|----------|---------------------------|--------------|-------------|----------------------------------|-------------|----------|----------------------|--------|-------------|-------------------|------------|--|
| | | Capital | Ops & Maint. | Total | Income Tax | Sales Tax | Residual | Total | Factor | Costs | Benefits | Net Change | |
| 0 | 2006 | -- | -- | -- | -- | -- | -- | -- | 1.0000 | 2,659,800 | 0 | -2,659,800 | |
| 1 | 2007 | \$2,594,900 | 64,900 | 2,659,800 | -- | -- | -- | \$0 | 0.8929 | 57,900 | 330,000 | 272,100 | |
| 2 | 2008 | 64,900 | 64,900 | 64,900 | 140,000 | \$229,600 | -- | 369,600 | 0.7972 | 51,700 | 300,700 | 249,000 | |
| 3 | 2009 | 64,900 | 64,900 | 64,900 | 142,900 | \$234,300 | -- | 377,200 | 0.7118 | 46,200 | 274,300 | 228,100 | |
| 4 | 2010 | 64,900 | 64,900 | 64,900 | 146,000 | \$239,400 | -- | 385,400 | 0.6355 | 41,200 | 250,000 | 208,800 | |
| 5 | 2011 | 64,900 | 64,900 | 64,900 | 149,000 | \$244,400 | -- | 393,400 | 0.5674 | 36,800 | 227,900 | 191,100 | |
| 6 | 2012 | 64,900 | 64,900 | 64,900 | 152,100 | \$249,500 | -- | 401,600 | 0.5066 | 32,900 | 208,500 | 175,600 | |
| 7 | 2013 | 64,900 | 64,900 | 64,900 | 155,900 | \$255,600 | -- | 411,500 | 0.4523 | 29,400 | 190,600 | 161,200 | |
| 8 | 2014 | 64,900 | 64,900 | 64,900 | 159,600 | \$261,800 | -- | 421,400 | 0.4039 | 26,200 | 174,200 | 148,000 | |
| 9 | 2015 | 64,900 | 64,900 | 64,900 | 163,400 | \$268,000 | -- | 431,400 | 0.3606 | 23,400 | 160,300 | 136,900 | |
| 10 | 2016 | 64,900 | 64,900 | 64,900 | 168,400 | \$276,100 | -- | 444,500 | 0.3220 | 20,900 | 146,300 | 125,400 | |
| 11 | 2017 | 64,900 | 64,900 | 64,900 | 172,100 | \$282,200 | -- | 454,300 | 0.2875 | 18,700 | 133,500 | 114,800 | |
| 12 | 2018 | 64,900 | 64,900 | 64,900 | 175,900 | \$288,400 | -- | 464,300 | 0.2567 | 16,700 | 121,700 | 105,000 | |
| 13 | 2019 | 64,900 | 64,900 | 64,900 | 179,600 | \$294,600 | -- | 474,200 | 0.2292 | 14,900 | 111,400 | 96,500 | |
| 14 | 2020 | 64,900 | 64,900 | 64,900 | 184,000 | \$301,900 | -- | 485,900 | 0.2046 | 13,300 | 101,800 | 88,500 | |
| 15 | 2021 | 64,900 | 64,900 | 64,900 | 188,500 | \$309,100 | -- | 497,600 | 0.1827 | 11,900 | 93,000 | 81,100 | |
| 16 | 2022 | 64,900 | 64,900 | 64,900 | 192,900 | \$316,400 | -- | 509,300 | 0.1631 | 10,600 | 85,000 | 74,400 | |
| 17 | 2023 | 64,900 | 64,900 | 64,900 | 197,400 | \$323,700 | -- | 521,100 | 0.1456 | 9,500 | 77,600 | 68,100 | |
| 18 | 2024 | 64,900 | 64,900 | 64,900 | 201,800 | \$331,000 | -- | 532,800 | 0.1300 | 8,400 | 71,100 | 62,700 | |
| 19 | 2025 | 64,900 | 64,900 | 64,900 | 207,100 | \$339,700 | -- | 546,800 | 0.1161 | 7,500 | 65,500 | 58,000 | |
| 20 | 2026 | 64,900 | 64,900 | 64,900 | 213,800 | \$350,600 | -- | 564,400 | | | | | |
| Totals | | \$2,594,900 | \$1,298,000 | \$3,892,900 | \$3,290,400 | \$5,396,300 | \$0 | \$8,686,700 | | \$3,137,900 | \$3,123,400 | -\$14,500 | |

Source: Wilbur Smith Associates

| | |
|---------------|---------|
| Discount Rate | 12% |
| NPV | \$7,200 |
| IRR | 12.0% |
| B/C Ratio | 1.00 |

Section 7:

Lee's Summit Airport – Case Study

7. Lee's Summit Municipal Airport – Case Study

This section provides a case study return on investment (ROI) analysis for the Lee's Summit Municipal Airport in which state tax revenues associated with the economic development impacts are compared to the capital improvement project costs. The section begins with a review of the airport's location and infrastructure, followed by an analysis of the regional economy and major users. The information provides a means to compare the regional economic needs with the existing and planned airport infrastructure, and thereby gauge the resulting economic development impacts associated with airport development.

7.1. Airport Location and Infrastructure

The business and institutions around the Lee's Summit Municipal Airport use the general aviation airport facilities to accommodate the region's rising demand for goods and services. Past infrastructure improvements help facilitate industry growth in the airport study area as well as attract new industry. The following subsection summarizes airport characteristics, activity and future needs.

Airport Location/Access – Lee's Summit Municipal Airport is located approximately 15 miles southeast of downtown Kansas City in Jackson County, as shown in **Exhibit 7-1**. Since 1960, the population of Lee's Summit has grown substantially from 8,300 to over 85,600 (a growth of 935%)²⁴, making it a significant economic engine in its own right. The excellent highway access via State Highway 291 and Interstate 470 continue to facilitate this economic growth, with population forecasted to surpass 140,000 between 2030 and 2035. In addition, the map also indicates that five other airports are located in the region, only two of which are within a 30-minute drive time of the airport. The primary runway facilities, total based aircraft and total aircraft operations for each are summarized in **Exhibit 7-2**.

Airport Facilities – Lee's Summit Municipal is classified as a Commercial General Aviation Airport. The airport provides two runways, Runway 11/29 and Runway 18/36, that are 3,800 and 4,015 feet long, respectively. Discussions with the airport manager indicate that a proposed runway extension and new apron are essential in accommodating existing business demand and attracting new industry to the region. Existing, minimum objective, and recommended facilities are summarized in **Exhibit 7-3**.

²⁴ Annual Development Report, January 2005; Lee's Summit Department of Planning.

Exhibit 7-1
Airport Location and Drive Time – Lee’s Summit Municipal Airport
 Missouri Airport Investment Study

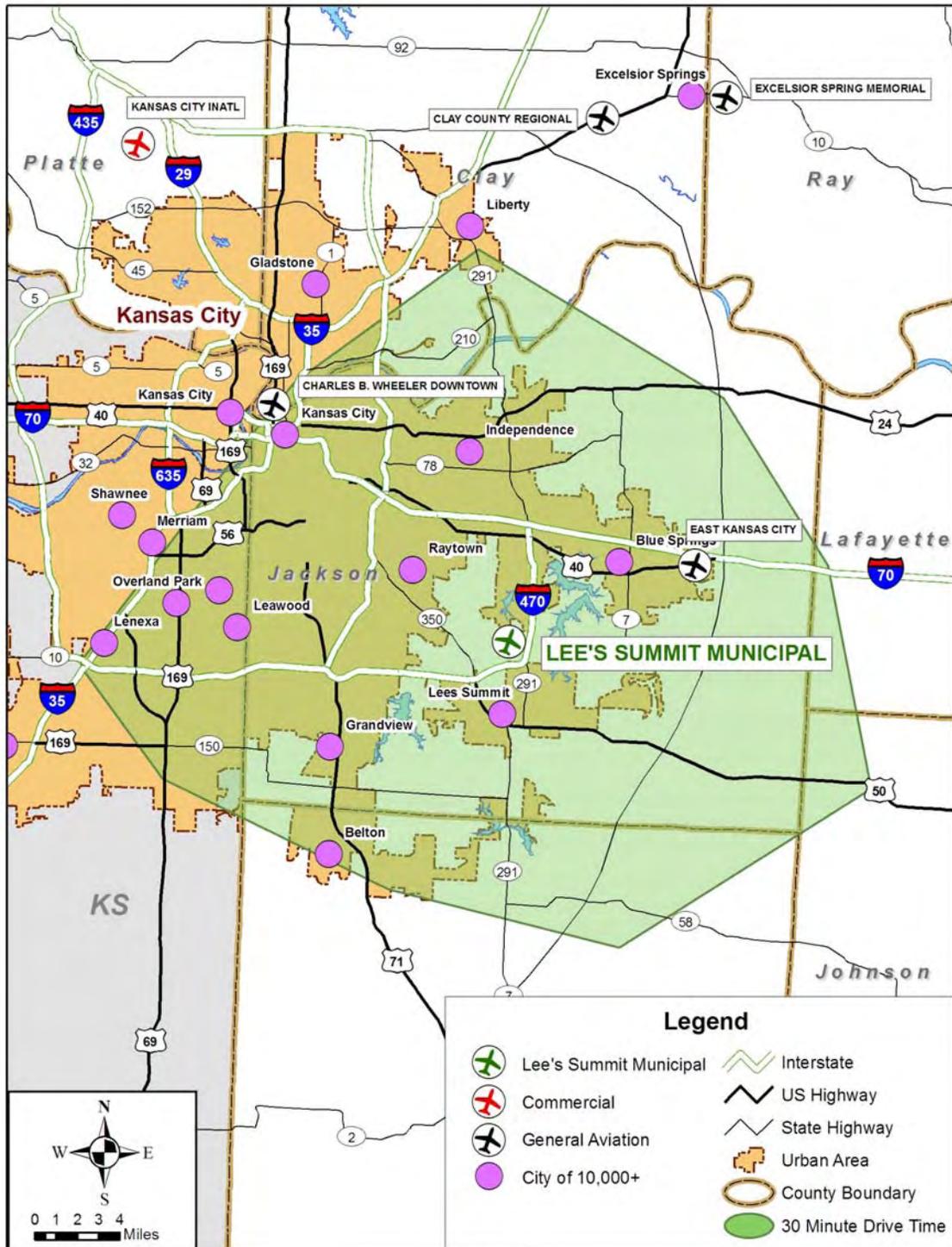


Exhibit 7-2

Regional Airport Facilities – Lee’s Summit Municipal Airport
Missouri Airport Investment Study

| Airport | Commercial | Primary Runway | | Based | Aircraft |
|-----------------------------|------------|----------------|------------|------------|----------------|
| | Service | Length | Width | Aircraft | Operations |
| Lee’s Summit Muni. | N | 4,015' | 75' | 173 | 102,300 |
| Charles B. Wheeler Dwnt. | N | 7,002 | 150 | 301 | 12,327 |
| East Kansas City | N | 4,507 | 44 | 144 | 25,000 |

Exhibit 7-3

Airport Facilities and Services – Lee’s Summit Municipal Airport
Missouri Airport Investment Study

| | Existing | Minimum System Objective | Recommendation |
|----------------------------|--|--|------------------------------|
| Airside Facilities | | | |
| Airport Reference Code | B-II | C-II | Upgrade ARC Design Standards |
| Primary Runway Length | 4,015' | 5,500' | Extend RWY 1,485' |
| Primary Runway Width | 75' | 100' | Widen RWY 25' |
| Taxiway Type | Full Parallel | Full Parallel | None |
| Approach | Non-Precision | Non-Precision | None |
| Lighting | MIRL/MITL | MIRL/MITL | Install MITL |
| NAVAIDS | Rotating Beacon Lighted wind cone/segmented circle | Rotating Beacon Lighted wind cone/segmented circle | None None |
| | REILs | REILs | None |
| | VASI | VGSI (VASIs/PAPIS) | Replace VASIs with PAPIs |
| Weather | | Other | |
| Landside Facilities | | | |
| Covered Storage | 154 spaces | 70% of based aircraft | None |
| Aircraft Apron | 82 spaces | 30% of based aircraft plus an additional 75% for transient use | 118 additional spaces |
| Terminal/Admin Building | 2,400 sq.ft. | 2,500 sq.ft. (incl. public restrooms, conference rooms and pilot lounge) | None |
| Auto Parking | 53 spaces | 1 space for each based aircraft plus 50% for employees/visitors | 232 additional spaces |
| Fuel | AvGas/Jet A | AvGas/Jet A | None |
| FBO | Full Service | Full Service | None |
| Maintenance | Limited Service | Full Service | None |
| Ground Transportation | Rental Car Available | Rental Car Available | None |
| Ground Communications | Public Phone | Public Phone and GCO | Install GCO |

Source: Missouri State Airport System Plan, 2006

Aviation Forecasts – Aircraft operations in 2002 totaled 102,300 and are forecast to grow steadily to 148,900 by the year 2022 (46%) as shown in **Exhibit 7-4**. Based aircraft totaled 173 in 2002 and are also forecast to grow steadily to 191 by 2022 (10.4%). The average annual operations per based aircraft ratio, approximately 591 operations per based aircraft in 2002, is forecast to rise to 780 operations per based aircraft by 2022.

Exhibit 7-4
Aviation Forecasts – Lee’s Summit Municipal Airport
 Missouri Airport Investment Study

| Activity Forecasts | 2002 | 2007 | 2012 | 2022 |
|----------------------------|---------------|---------------|---------------|---------------|
| Aircraft Operations | | | | |
| Local | 59,000 | 65,700 | 72,400 | 85,900 |
| Itinerant | <u>43,300</u> | <u>48,300</u> | <u>53,100</u> | <u>63,000</u> |
| Total | 102,300 | 114,000 | 125,500 | 148,900 |
| Based Aircraft | | | | |
| Single-Engine | 151 | 153 | 154 | 159 |
| Multi-Engine | 19 | 19 | 20 | 21 |
| Jet | 2 | 4 | 6 | 10 |
| Helicopter | 1 | 1 | 1 | 1 |
| Glider | 0 | 0 | 0 | 0 |
| Ultralight | <u>0</u> | <u>0</u> | <u>0</u> | <u>0</u> |
| Total | 173 | 177 | 181 | 191 |

Source: Missouri State Airport System Plan, 2006

Capital Development Costs – The major runway rehabilitation and extension of Runway 18/36 to 5,500 feet is a major component of the overall five-year master plan, which includes a new terminal, air traffic control tower, etc., totaling \$60.4 million as shown in **Exhibit 7-5**. Clearly, the expanded and improved airport facility will dramatically change the airport’s ability to accommodate a wide range of aircraft in varying weather conditions.

Exhibit 7-5
Capital Development Costs – Lee’s Summit Municipal Airport
 Missouri Airport Investment Study

| | |
|--|---------------------|
| Short Term (5-Year) | |
| Rehabilitate Runway 18-36 | \$1,550,000 |
| Extend and Widen Runway 18-36 (5,500 x 100') | \$8,670,000 |
| Construct Air Traffic Control Tower | \$2,500,000 |
| Develop East Terminal Area | \$12,346,300 |
| Land Acquisition for Runway 18-36 Extension | \$14,204,600 |
| Construct New Terminal Access Road | \$1,156,000 |
| Construct North Half of Terminal Ramp | \$1,726,000 |
| Construct Terminal Parking Lot | \$370,000 |
| Construct East Parallel Taxiway (TXYs C, A2, | \$3,308,000 |
| Construct Terminal Parking Lot | \$880,000 |
| Construct Fuel Facility | \$470,000 |
| Construct New Vault | \$590,000 |
| Phase I of T-Hangars in N.E. Quadrant | \$2,840,000 |
| Demolish T-Hangars and Terminal Building | \$110,000 |
| Construct New West Entrance Road | \$620,000 |
| Construct Relocated Taxiway A | \$3,040,000 |
| Extend Runway 11-29 200' | \$510,000 |
| Rehabilitate Runway Intersection | \$730,000 |
| Relocate Strother Road | \$1,350,000 |
| Extend Taxiway A | \$2,680,000 |
| Install Perimeter Fencing | \$770,000 |
| <i>Short Term Subtotal</i> | \$60,420,900 |
| Long Term (20-Year) | |
| Install Approach Lights on Runway 18 | \$530,000 |
| Construct South Half of Terminal Ramp | \$1,760,000 |
| Construct Northeast Hold Apron | \$240,000 |
| Construct Northwest Hold Apron | \$270,000 |
| Construct North Perimeter Road | \$400,000 |
| Construct South Perimeter Road - Phase II | \$440,000 |
| Install ILS on Runway 36 | \$1,850,000 |
| Extend Runway 18-36 North 200' | \$1,690,000 |
| Construct Taxiway A-1 | \$460,000 |
| Construct Taxiway E | \$480,000 |
| Construct Diagonal Taxiway (Taxiway D) | \$550,000 |
| Construct By-Pass Taxiway (Taxiway A5) | \$210,000 |
| Construct Partial Parallel Taxiway (Taxiways E | \$890,000 |
| Phase I of T-Hangars in N.W. Quadrant | \$1,610,000 |
| Phase II of T-Hangars in N.W. Quadrant | \$490,000 |
| Phase II of T-Hangars in N.E. Quadrant | \$1,270,000 |
| Phase III of T-Hangars in N.W. Quadrant | \$1,610,000 |
| <i>Long Term Subtotal</i> | \$14,750,000 |
| Total Development Costs | \$75,170,900 |

Source: Missouri State Airport System Plan, 2006

7.2. Regional Economy and Users

This section identifies countywide economic development and growth, as well as employment levels for typical firms that use/depend on general aviation airports. Specifically, the analysis focuses on those sectors considered most likely to use and/or benefit from general aviation airport improvements; namely tourism, business/convention, manufacturing and institutional sectors. Further, flight activity of major users who file flight plans are evaluated to identify major user firms, frequency, aircraft type and flight origin/destination data.

County Employment – The airport is located in Jackson County where a total of over 300,000 people are employed. Of these, over 20% (64,126) work in the four key sectors that potentially rely on general aviation for the transport of people, equipment or goods. However, the manufacturing sector declined 3% over the past five years, while the business and institutional sectors rose (3.4% and 4.9%, respectively), as summarized in **Exhibit 7-6**.

Exhibit 7-6

Employment Sector Growth – Jackson County (Lee’s Summit) Missouri Airport Investment Study

| Industry Sector | | Employment | | Avg Annual Growth |
|----------------------|------------|----------------|----------------|-------------------|
| Description | SIC Codes | 1998 | 2003 | |
| Key Sectors | | | | |
| Manufacturing | 20-39 | 44,422 | 38,168 | -3.0% |
| Business | 81, 87, 89 | 10,838 | 12,787 | 3.4% |
| Tourism | 70, 79 | 6,452 | 6,901 | 1.4% |
| Institutional | 80, 82 | <u>4,929</u> | <u>6,270</u> | 4.9% |
| Subtotal | | 66,641 | 64,126 | -0.8% |
| Other Sectors | | <u>229,873</u> | <u>236,919</u> | 0.6% |
| Total | | 296,514 | 301,045 | 0.3% |

Source: U.S. Bureau of the Census

Development and Growth – Results of the EDGE model, as shown in **Exhibit 7-7**, indicate that while several industries are expanding in Jackson County, all industries face high production costs relative to the rest of Missouri, which may explain the overall decline in the manufacturing sector employment. These high production costs primarily reflect high wages relative to the rest of Missouri. Conversely, a sufficient labor market exists with the necessary skills to fill employment demand in all industries.

Exhibit 7-7

Economic Development & Growth Summary – Jackson County (Lee’s Summit)
Missouri Airport Investment Study

| SIC | Industry | Growth Potential | Competive Concerns | | SIC | Industry | Growth Potential | Competive Concerns | |
|-----|------------------------------------|------------------|--------------------|--------------|-----|-----------------------------------|------------------|--------------------|--------------|
| | | | Production Costs | Labor Market | | | | Production Costs | Labor Market |
| 7 | Agricultural services | | X | | 48 | Communications | X | X | |
| 8 | Forestry | | X | | 49 | Electric, gas & sanitary services | X | X | |
| 9 | Fishing | | | | 50 | Wholesale trade-durable goods | X | X | |
| 10 | Metal mining | | | | 51 | Wholesale trade - nondurables | | X | |
| 12 | Coal mining | | | | 52 | Bldg materials & garden supplies | X | X | |
| 13 | Oil and gas extraction | X | X | | 53 | General merchandise | | X | |
| 14 | Nonmetallic minerals, exc. fuels | | X | | 54 | Foods stores | X | X | |
| 15 | General contractors | X | X | | 55 | Auto dealers & service stations | X | X | |
| 16 | Heavy construction | X | X | | 56 | Apparel and accessory stores | X | X | |
| 17 | Special trade contractors | | X | | 57 | Furniture and home stores | X | X | |
| 20 | Food and kindred products | | X | | 58 | Eating and drinking estabs | X | X | |
| 21 | Tobacco products | | X | | 59 | Miscellaneous retail | X | X | |
| 22 | Textile mill products | | X | | 60 | Depository institutions | | X | |
| 23 | Apparel & other textile products | | X | | 61 | Nondepository institutions | | X | |
| 24 | Lumber and wood products | | X | | 62 | Security & commodity brokers | X | X | |
| 25 | Furniture and fixtures | | X | | 63 | Insurance carriers | X | X | |
| 26 | Paper and allied products | | X | | 64 | Insurance agents, services | X | X | |
| 27 | Printing and publishing | | X | | 65 | Real estate | | X | |
| 28 | Chemicals and allied products | | | | 66 | Holding, investment offices | | X | |
| 29 | Petroleum and coal products | | | | 70 | Hotels and other lodging | X | X | |
| 30 | Rubber & misc. plastics products | | X | | 72 | Personal services | X | X | |
| 31 | Leather and leather products | | X | | 73 | Business services | X | X | |
| 32 | Stone, Clay, and glass products | | X | | 75 | Auto repair, services, parking | X | X | |
| 33 | Primary metal industries | | X | | 76 | Miscellaneous repair services | X | X | |
| 34 | Fabricated metal products | | X | | 78 | Motion pictures | | X | |
| 35 | Industrial machinery and equip. | | X | | 79 | Amusements & recreation | X | X | |
| 36 | Electronic & other electric equip. | | X | | 80 | Health services | | X | |
| 37 | Transportation equipment | | X | | 81 | Legal services | | X | |
| 38 | Instruments & related products | | X | | 82 | Educational services | | X | |
| 39 | Mis. manufacturing industries | | X | | 83 | Social services | X | X | |
| 41 | Local & interurban pass. transit | | X | | 84 | Museums, botanical, zoos | | X | |
| 42 | Trucking and warehousing | | X | | 86 | Membership organizations | X | X | |
| 44 | Water transportation | X | X | | 87 | Engineering & management | | X | |
| 45 | Transportation by air | X | X | | 89 | Services, other | X | X | |
| 46 | Pipelines, except natural gas | X | X | | 99 | Unclassified establishments | | X | |
| 47 | Transportation services | | X | | | | | | |

Note: "xx" in the Labor Market indicates a major concern

Source: Wilbur Smith Associates

- Tourism
- Business Services
- Manufacturing
- Institutional

Potential Airport User Employment – Another source, InfoUSA, was used to obtain employment by firm in the region for firms with 20+ employees. Given the large metropolitan size of the region, hundreds of firms were initially identified. The database was further mined for the Lee’s Summit analysis to reflect firms with 100+ employees and within approximately 10 miles of the airport. As expected, the major concentration of airport potential users is located in the downtown Kansas City area, as shown in **Exhibit 7-8** (see next page). In addition, a smaller concentration of potential airport users firms is located south of Kansas City along Interstate 470, and, to a lesser degree, in Lee’s Summit.

Major Current Airport Users – A summary of major Lee’s Summit Municipal Airport users, according to logged flight plans, is presented in **Exhibit 7-9** (see subsequent page). The table indicates a wide range of primary users that includes both recognizable firms to unidentifiable operators to private users who fly jets, turbo-props and piston aircraft. One major user, Dejamette Enterprises, operates a charter operation that transports organs, patients, surgery teams, etc. to/from a Kansas City research hospital. Nonetheless, it was difficult to draw definitive conclusions from this list on who the major users were, let alone their firm’s dependence on the airport.

To gain further perspective on the local firms that based part of their past economic development decisions on the airport, local government and economic development representatives were contacted. These individuals identified several major employers who regularly use the airport to transport personnel, clients and or customers. Such firms include a wide range of firms as shown in **Exhibit 7-10**. Customers fly in routinely to attend the wholesale car auction (ADESA). In addition, other tenants at the Summit Technology Center, aside from Lab One and CareMark, routinely use the airport. The general impression is that the airport plays an increasingly vital role in the transport of business people to/from the region. However, no specific industry was identified that made an investment decision primarily due to the airport, or one that is expected to invest in the region because of the planned runway/taxiway/tower improvements.

Exhibit 7-10
Key Airport Users – Lee’s Summit Municipal Airport
 Missouri Airport Investment Study

| Company Name | NAIC Code | Description | Jobs |
|------------------------------|---------------|---------------------------------|--------------|
| Immigration & Naturalization | 928120 | Federal Government | 450 |
| ADESA Kansas City | 421110 | Wholesale Car Auction | 250 |
| CareMark | 541422 | Pharmaceutical Customer Service | 250 |
| Lab One | 541422 | Pharmaceutical Customer Service | 200 |
| Progress Instruments | 334418 | Electric Design Manufacturing | 110 |
| Pavestone | 327331 | Conveyance Systems | 75 |
| Deco Tool | 333514 | Tool & Die Distribution | 25 |
| Summit Technology Campus | ---- | Various | NA |
| Total | | | 1,360 |

Source: Lee’s Summit Economic Development Council

Exhibit 7-8

Key Potential Airport User Firms by Industry Type – Lee’s Summit Municipal Airport
Missouri Airport Investment Study

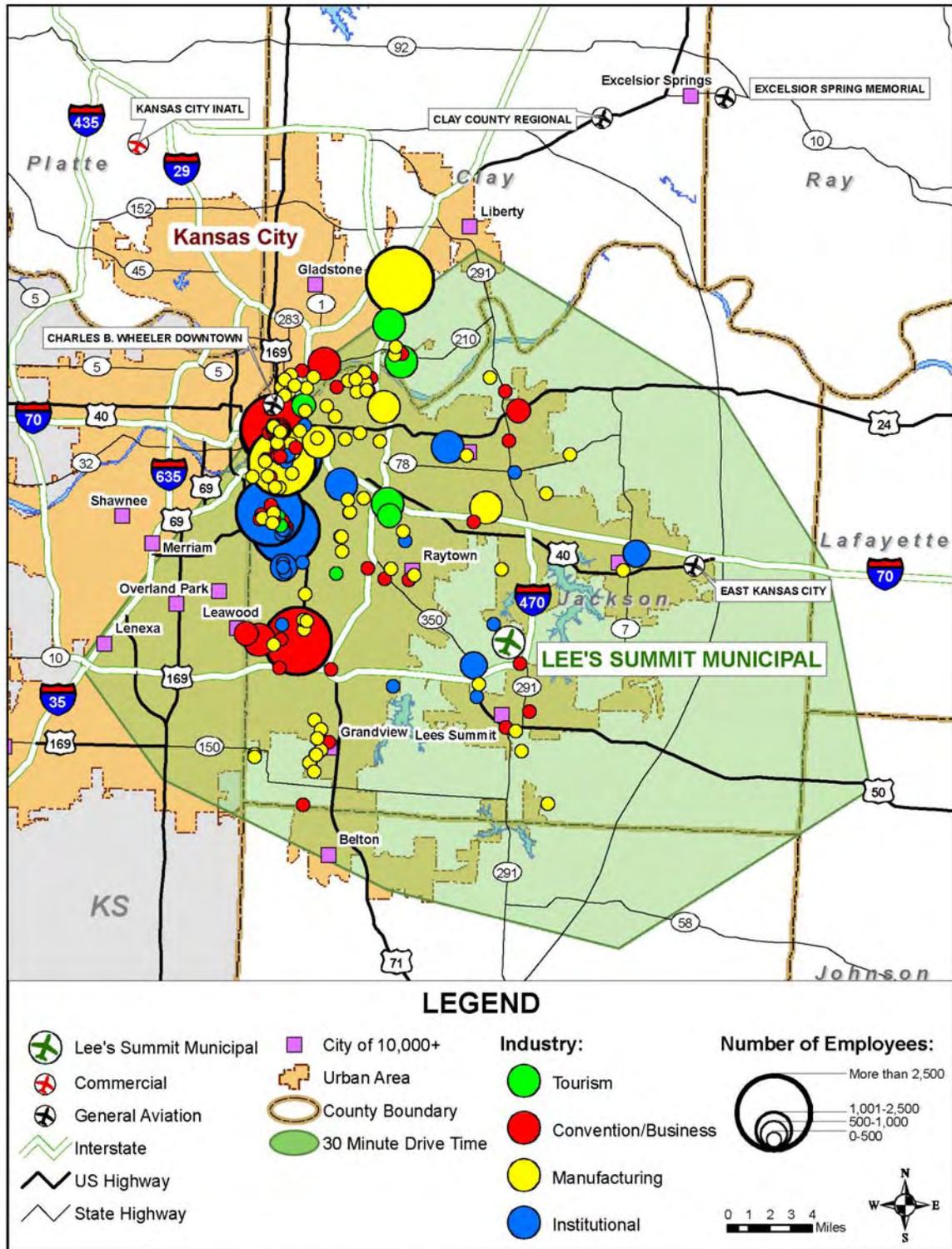


Exhibit 7-9

Major Airport Users – Lee’s Summit Municipal Airport
Missouri Airport Investment Study

| Lee’s Summit Firm | Registered Location | | Tail # | Aircraft Data | | Annual Opers |
|---------------------------|---------------------|-------|--------|------------------|--------|--------------|
| | City | State | | Make/Model | Class | |
| Major Aviation Llc | Wilmington | DE | N888EX | Beech 200 | Turbo | 173 |
| Williams David | Lee’s Summit | MO | N144GM | Beech P35 | Piston | 173 |
| Dejarnette Enterprises | Lee’s Summit | MO | N773CA | Cessna 550 | Jet | 158 |
| Engineering Perspective | Independence | MO | N162TC | Cessna 182S | Piston | 132 |
| Ashley Myron | Lee’s Summit | MO | N2446T | Ryan Navion G | Piston | 72 |
| National Limousine Srv. | Leawood | KS | N429PC | Pilatus Pc-12/45 | Piston | 70 |
| Air Charter Sales Llc | Lee’s Summit | MO | N650FP | Cessna 650 | Jet | 66 |
| Stanley Bank | Overland Park | KS | N525JJ | Cessna 525 | Jet | 66 |
| Woodstock Investments Inc | Lee’s Summit | MO | N7979K | Beech 95-B55 | Piston | 49 |
| Powis Michael P | Oak Grove | MO | N1576W | Beech V35B | Piston | 36 |
| Skys The Limit Entrp. Llc | Missoula | MT | N414KW | Cessna 414A | Piston | 36 |
| Peterson Daniel R Trustee | Papillion | NE | N234EB | Beech V35 | Piston | 33 |
| Wing Flying Club | Lee’s Summit | MO | N2211J | Piper Pa-28-236 | Piston | 32 |
| J.R. Vannoy & Sons Cnstr. | Jefferson | NC | N40CJ | Cessna 525 | Jet | 28 |
| Stracner Rickey L | Lee’s Summit | MO | N2184T | Piper Pa-28-180 | Piston | 28 |
| Sunrise Aviation Inc | Wichita | KS | N6873Q | Cessna 425 | Turbo | 28 |
| Great Southern Bank | Springfield | MO | N900DS | Cessna 525 | Jet | 26 |
| Hawkins David W | Odessa | MO | N111YF | Beech B100 | Turbo | 26 |
| RJD Group Llc | Sedalia | MO | N311SK | Cessna 310R | Piston | 26 |
| Heartland Tanning Inc | Lee’s Summit | MO | N92835 | Piper Pa 46-350P | Piston | 25 |
| Unknown | | | N500LD | | Piston | 25 |
| M J Harden Associates | Kansas City | MO | N22GE | Piper Pa-31-325 | Piston | 24 |
| Ressegieu Matthew V | Overland Park | KS | N732KC | Cessna T210L | Piston | 24 |
| George J Siebers & Co Inc | Merriam | KS | N2278S | Beech B-55 | Piston | 23 |
| Silver Eagle Aerial Inc | Warrensburg | MO | N51783 | Cessna 206H | Piston | 23 |
| P & K Aviation Inc | Lee’s Summit | MO | N739DD | Cessna 172N | Piston | 22 |
| Lamb Jerome | Independence | MO | N1979 | Beech A36 | Piston | 21 |
| Dark Star 1 Inc | Bear | DE | N28WV | Beech 58P | Piston | 20 |
| Hasek Charles N | Lee’s Summit | MO | N75PR | Beech K35 | Piston | 20 |
| Husted John | Olathe | KS | N2027D | Beech 58 | Piston | 20 |
| Werner Albert E Trustee | Raytown | MO | N3280R | Piper Pa-28R-180 | Piston | 20 |
| Wing Flying Club Inc | Lee’s Summit | MO | N3575X | Piper Pa-28-181 | Piston | 20 |

Source: GCR & Associates

7.3. Economic Development Impacts and ROI

Economic development impacts associated with airport improvements at Lee’s Summit will occur. However, unlike the rural nature of Monett in which the runway extension was a vital factor in retaining the expanding firm, the urban nature of Lee’s Summit generates many factors that induce development. Specifically, the rising demand for goods and services induce firm investment. These firms look for the most efficient means to conduct business, and the general aviation facilities at Lee’s Summit offer the most efficient air transport for a wide array of business users. Given the lack of viable airport alternatives in the southeastern Kansas City region, Lee’s Summit Municipal Airport provides a vital means for local firms to accommodate the rising demand.

Frank discussions with the Lee’s Summit Economic Development Council support this diagnosis and point out that the airport supports the high-end, professional growth at the Summit Technology Center. Without the airport, it is believed that some of this development would migrate across the river to Kansas, where local economic officials aggressively recruit industry.

Further, as the demand for non-commercial aviation grows, aviation service firms at the airport will grow and new firms and corporate flight departments will emerge. To provide perspective on the potential magnitude of such at-airport developments, Missouri airports with significant at-airport employment were identified as presented below in **Exhibit 7-11**. Each airport has its own unique at-airport environment ranging from a national guard facility at St. Joseph to a military aircraft maintenance facility at Perryville to extensive corporate facilities at the Spirit of St. Louis. Given the economic growth of the Lee’s Summit area and the expanded aviation facilities, it is envisioned that Lee’s Summit will evolve in a similar, but smaller model as that of the Spirit of St. Louis.

Exhibit 7-11
At-Airport Job Impacts – Selected Airports
 Missouri Airport Investment Study

| Airport | At-Airport | Primary Runway | | Based | Aircraft |
|-------------------------|------------|----------------|-------|----------|------------|
| | Employment | Length | Width | Aircraft | Operations |
| Lee's Summit Muni. | 18 | 4,015' | 75' | 173 | 102,300 |
| Charles B. Wheeler Dwn. | 244 | 7,002' | 150' | 301 | 12,327 |
| Perryville | 408 | 7,000' | 100' | 23 | 10,350 |
| Saint Joseph | 713 | 8,059' | 150' | 91 | 18,481 |
| Spirit of St. Louis | 1,252 | 7,485' | 150' | 426 | 184,371 |

Source: Missouri State Airport System Plan, 2006

Given these observations, sufficient information is not available to specifically estimate economic development impacts associated with the CIP, rather a breakeven economic analysis is conducted to determine what level of annual impacts would be required for the \$60.4 million short-term airport development projects to recover the costs and ‘break-even” over a 20-year period. A qualitative assessment is then made as to whether such benefits could be expected

in light of the airports activity levels, facilities and surrounding economy. The analysis assumes the capital improvements are undertaken in 2007 and 2008, with the partial benefits beginning the following year and ramping-up in the following few years before leveling out to the overall projected growth rates in years 2012-2026.

Economic and Tax Impacts – The breakeven approach estimates the direct jobs required by the airport improvement to make the project feasible given a 12% discount rate over a 20-year analysis period. The approach estimates the resulting level of direct earnings and output based on an average of the industries considered to be the major potential airport users, as discussed above. Further, the state sales and income tax receipts include those resulting from both the direct and multiplier related impacts. Again, the average multipliers for those industries most likely to use the airport are used to estimate the multiplier impacts.

Future job growth is estimated at an annual rate of 10.0% between 2008-2017 and 5% between 2017-2026, which reflects a higher growth than the forecasted annual operations, but a slower growth than the overall regional economy. Based on these assumptions, the required change in direct impacts attributable to the airport improvements, both at-airport and off-airport, rises from 808 jobs in 2008 to 2,821 jobs by 2026, as shown in **Exhibit 7-12**. These annual employment requirements drive the ensuing impact and ROI estimates.

Exhibit 7-12

Direct Job Impact Requirements – Lee’s Summit Airport Improvements
Missouri Airport Investment Study

| Project Year | Calendar Year | Direct Jobs | Project Year | Calendar Year | Direct Jobs |
|--------------|---------------|-------------|--------------|---------------|-------------|
| 1 | 2007 | 0 | 11 | 2017 | 1,819 |
| 2 | 2008 | 808 | 12 | 2018 | 1,910 |
| 3 | 2009 | 889 | 13 | 2019 | 2,006 |
| 4 | 2010 | 978 | 14 | 2020 | 2,106 |
| 5 | 2011 | 1,076 | 15 | 2021 | 2,211 |
| 6 | 2012 | 1,184 | 16 | 2022 | 2,322 |
| 7 | 2013 | 1,302 | 17 | 2023 | 2,438 |
| 8 | 2014 | 1,432 | 18 | 2024 | 2,560 |
| 9 | 2015 | 1,575 | 19 | 2025 | 2,688 |
| 10 | 2016 | 1,732 | 20 | 2026 | 2,821 |

Source: Wilbur Smith Associates

If the 808 direct jobs in 2008 are attracted to the region due to the runway extension, an additional estimated 1,212 multiplier related jobs would be attracted to the area.²⁵ Based on these assumptions, the total impacts for three benchmark years (2008, 2016, and 2026) are summarized in **Exhibit 7-13**, which suggests that the total jobs would rise from 2,020 jobs (808 direct and 1,212 multiplier) in 2008 to 7,053 jobs by 2026. Such economic activity levels would

²⁵ Multiplier impacts based on an average of IMPLAN multipliers for potential user firms.

generate an estimated \$4.3 million in state income and sales tax receipts in 2008 and \$14.9 million by 2026.

Exhibit 7-13

Breakeven Economic Impacts and Tax Collections – Lee’s Summit Airport Improvements
Missouri Airport Investment Study

| | 2008 | 2016 | 2026 |
|-------------------------|------------------|------------------|------------------|
| Economic Impacts | | | |
| Direct | | | |
| Jobs | 808 | 1,732 | 2,821 |
| Earnings | \$34,016,800 | \$72,918,032 | \$118,764,100 |
| Output | \$109,080,000 | \$233,822,667 | \$380,835,000 |
| Multiplier | | | |
| Jobs | 1,212 | 2,598 | 4,232 |
| Earnings | \$39,390,000 | \$84,435,963 | \$137,523,750 |
| Output | \$78,780,000 | \$168,871,926 | \$275,047,500 |
| Total | | | |
| Jobs | 2,020 | 4,330 | 7,053 |
| Earnings | \$73,406,800 | \$157,353,995 | \$256,287,850 |
| Output | \$187,860,000 | \$402,694,594 | \$655,882,500 |
| Tax Collections | | | |
| State Income Tax | \$1,614,900 | \$3,461,800 | \$5,638,300 |
| State Sales Tax | <u>2,648,600</u> | <u>5,677,600</u> | <u>9,247,300</u> |
| Total State Taxes | \$4,263,500 | \$9,139,400 | \$14,885,600 |

Source: Wilbur Smith Associates

State Tax Impacts and ROI – Based on these hypothetical tax impacts, the project would “breakeven” with a marginal NPV of \$9,100, an IRR of 12% and a B/C ratio of 1.00, as shown in **Exhibit 7-14**. The calculation includes the total cost of the capital improvements, an annual increase in operating costs, and no residual value.²⁶ If a more conservative, lower discount rate of 4% were used, a significantly lower attraction of jobs would be required to generate sufficient tax revenues; specifically 428 direct jobs in 2008 rising to 1,492 jobs by 2026.

In relative terms, the 2,821 direct jobs required to make the project feasible in 2026 approximate about 1.0% of the total current jobs in Lee’s Summit. **Given the large number of at-airport jobs at the Spirit of St. Louis, and the significant off-airport impact potential of facilitating business development, the large job requirements of the proposed Lee’s Summit Airport improvements are possible.** Further, using the lower discount rate of 4% further improves the results – nearly reducing by half the year one direct job requirements (from 808 to 428).

²⁶ Operating costs estimated at 2.5% of the capital cost; residual value assumes a 20-year project life.

Exhibit 7-14
Breakeven Return on Investment - Lee's Summit Runway/Taxiway/Tower Improvements
 Missouri Airport Investment Study

| Proj Year | Calc Year | Airport Improvement Costs | | | Economic Development Tax Impacts | | | Present Worth | | | Discounted Totals | | |
|-----------|-----------|---------------------------|--------------|--------------|----------------------------------|---------------|----------|---------------|--------|--------------|-------------------|-------------|----|
| | | Capital | Ops & Maint. | Total | Income Tax | Sales Tax | Residual | Total | Factor | Costs | Benefits | Change | |
| 0 | 2006 | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- | -- |
| 1 | 2007 | \$20,140,300 | | 20,140,300 | | | | \$0 | 1.0000 | 20,140,300 | 0 | -20,140,300 | |
| 2 | 2008 | 20,140,300 | | 20,140,300 | 1,614,900 | 2,648,600 | -- | 4,263,500 | 0.8929 | 17,982,400 | 3,806,700 | -14,175,700 | |
| 3 | 2009 | 20,140,300 | 193,300 | 20,333,600 | 1,776,800 | 2,914,100 | -- | 4,690,900 | 0.7972 | 16,209,800 | 3,739,600 | -12,470,200 | |
| 4 | 2010 | | 193,300 | 193,300 | 1,954,700 | 3,205,900 | -- | 5,160,600 | 0.7118 | 137,600 | 3,673,200 | 3,535,600 | |
| 5 | 2011 | | 193,300 | 193,300 | 2,150,600 | 3,527,100 | -- | 5,677,700 | 0.6355 | 122,800 | 3,608,300 | 3,485,500 | |
| 6 | 2012 | | 193,300 | 193,300 | 2,366,500 | 3,881,200 | -- | 6,247,700 | 0.5674 | 109,700 | 3,545,100 | 3,435,400 | |
| 7 | 2013 | | 193,300 | 193,300 | 2,602,300 | 4,268,000 | -- | 6,870,300 | 0.5066 | 97,900 | 3,480,700 | 3,382,800 | |
| 8 | 2014 | | 193,300 | 193,300 | 2,862,100 | 4,694,100 | -- | 7,556,200 | 0.4523 | 87,400 | 3,418,000 | 3,330,600 | |
| 9 | 2015 | | 193,300 | 193,300 | 3,148,000 | 5,162,900 | -- | 8,310,900 | 0.4039 | 78,100 | 3,356,600 | 3,278,500 | |
| 10 | 2016 | | 193,300 | 193,300 | 3,461,800 | 5,677,600 | -- | 9,139,400 | 0.3606 | 69,700 | 3,295,800 | 3,226,100 | |
| 11 | 2017 | | 193,300 | 193,300 | 3,635,600 | 5,962,700 | -- | 9,598,300 | 0.3220 | 62,200 | 3,090,400 | 3,028,200 | |
| 12 | 2018 | | 193,300 | 193,300 | 3,817,500 | 6,261,000 | -- | 10,078,500 | 0.2875 | 55,600 | 2,897,300 | 2,841,700 | |
| 13 | 2019 | | 193,300 | 193,300 | 4,009,400 | 6,575,700 | -- | 10,585,100 | 0.2567 | 49,600 | 2,716,900 | 2,667,300 | |
| 14 | 2020 | | 193,300 | 193,300 | 4,209,300 | 6,903,500 | -- | 11,112,800 | 0.2292 | 44,300 | 2,546,800 | 2,502,500 | |
| 15 | 2021 | | 193,300 | 193,300 | 4,419,100 | 7,247,700 | -- | 11,666,800 | 0.2046 | 39,600 | 2,387,300 | 2,347,700 | |
| 16 | 2022 | | 193,300 | 193,300 | 4,641,000 | 7,611,500 | -- | 12,252,500 | 0.1827 | 35,300 | 2,238,500 | 2,203,200 | |
| 17 | 2023 | | 193,300 | 193,300 | 4,872,800 | 7,991,800 | -- | 12,864,600 | 0.1631 | 31,500 | 2,098,500 | 2,067,000 | |
| 18 | 2024 | | 193,300 | 193,300 | 5,116,700 | 8,391,700 | -- | 13,508,400 | 0.1456 | 28,200 | 1,967,400 | 1,939,200 | |
| 19 | 2025 | | 193,300 | 193,300 | 5,372,500 | 8,811,300 | -- | 14,183,800 | 0.1300 | 25,100 | 1,844,500 | 1,819,400 | |
| 20 | 2026 | | 193,300 | 193,300 | 5,638,300 | 9,247,300 | -- | 14,885,600 | 0.1161 | 22,400 | 1,728,300 | 1,705,900 | |
| Totals | | \$60,420,900 | \$3,479,400 | \$63,900,300 | \$67,669,900 | \$110,983,700 | \$0 | \$178,653,600 | | \$55,429,500 | \$55,439,900 | \$10,400 | |

| | |
|---------------|---------|
| Discount Rate | 12% |
| NPV | \$9,100 |
| IRR | 12.0% |
| B/C Ratio | 1.00 |

Source: Wilbur Smith Associates

Section 8:
Branson West – Case Study

8. Branson West Airport – Case Study

This section provides a case study return on investment (ROI) analysis for the new, planned Branson West Airport in which state tax revenues associated with the economic development impacts are compared to the capital improvement project costs. The section begins with a review of the airport's location and infrastructure, followed by an analysis of the regional economy and major users. The information provides a means to compare the regional economic needs with the planned airport infrastructure, and thereby gauge the resulting economic development impacts associated with airport development.

8.1. Airport Location and Infrastructure

The new airport will serve the regional demand of leisure travelers and second home users drawn to the Branson region's attractions, as well as facilitate the diversification of a relatively isolated and constrained rural economy. The following subsection summarizes the regional characteristics.

Airport Location/Access – The proposed location for the Branson West Airport is approximately 2 miles north of City of Branson West in Stone County, and roughly 10 miles northwest of Branson, as shown in **Exhibit 8-1**. Highway access will be provided via Highway 13, a two-lane highway that connects to U.S. State Highway 76. In addition, the map also indicates that only one other airport, M. Graham Clark, is located in the region with a runway of 3,739 feet long by 100 feet wide, 55 based aircraft and 3,730 aircraft operations.

Planned Airport Facilities and Capital Development Costs – Branson West will be classified as a Business Airport with a single initial runway, Runway 03/21, planned at 5,000 feet long. The planned facilities and costs are summarized in **Exhibit 8-2**. The project will cost an estimated \$14.7 million and take two years to construct. Located on a mountain ridge, the site preparation work (\$4.7 million) comprises over half of the project costs.

8.2. Regional Economy and Users

This section identifies countywide economic development and growth, as well as employment levels for typical firms that use/depend on general aviation airports. Specifically, the analysis focuses on those sectors considered most likely to use and/or benefit from general aviation airport improvements; namely tourism, business/convention, manufacturing and institutional sectors. Further, interviews with community and business leaders were conducted to identify potential major user firms, frequency, aircraft type and airport dependence.

Exhibit 8-1
Airport Location and Drive Time – Branson West Airport
 Missouri Airport Investment Study

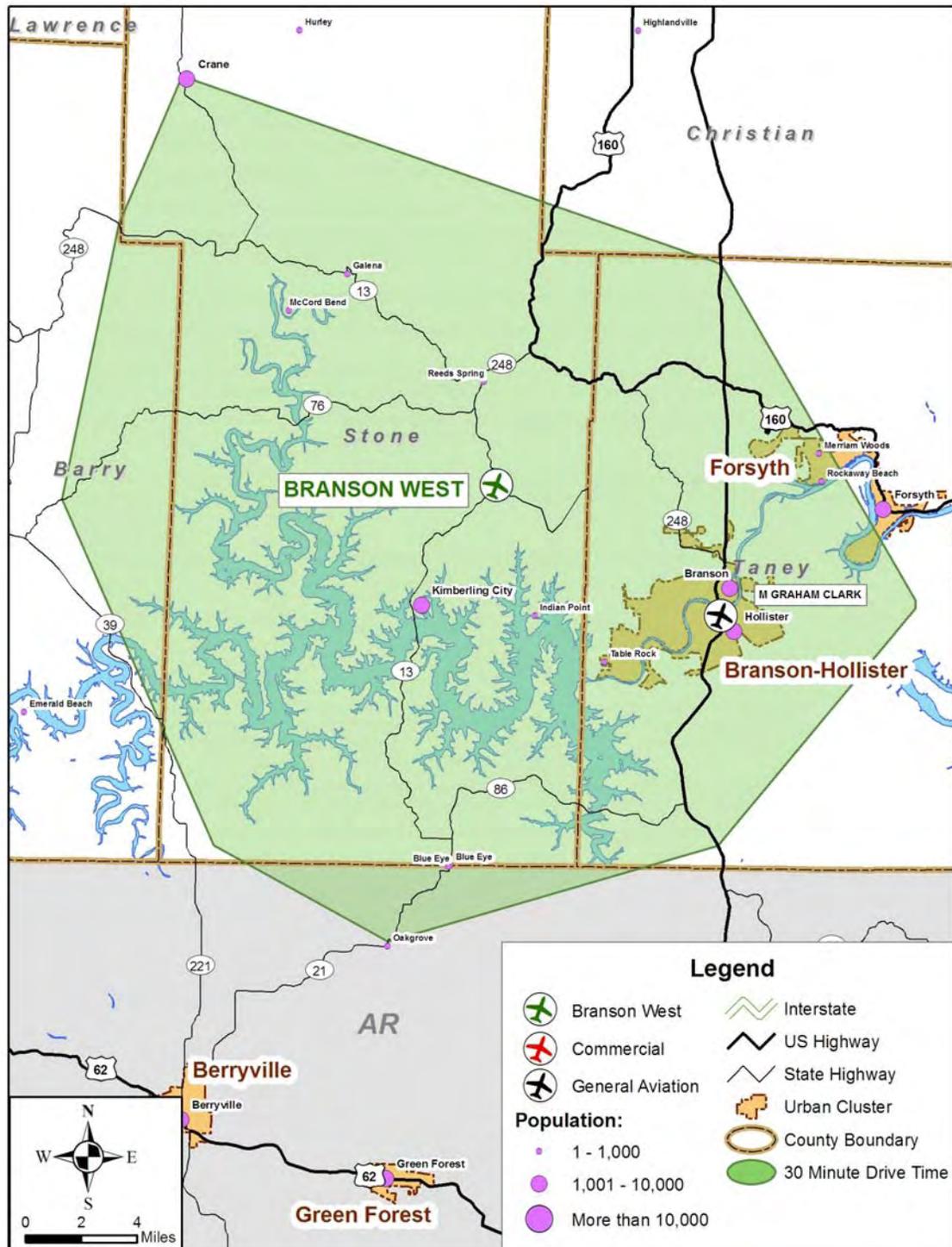


Exhibit 8-2
Capital Development Costs – Branson West
 Missouri Airport Investment Study

| | |
|----------------------------------|----------------------------|
| Phase I | |
| A. Site Preparation | \$7,886,085 |
| B. Ance Creek Road | 454,420 |
| C. Treatment Plant Access Road | 58,380 |
| D. Engineering & Administration | <u>744,000</u> |
| <i>Subtotal</i> | <i>\$9,142,885</i> |
| Phase II | |
| A. Site Work | \$335,000 |
| B. Access & Treatment Plant Road | 59,400 |
| C. Runway | 2,004,040 |
| D. Taxiway | 942,500 |
| E. Aircraft Parking Apron | 348,080 |
| F. Navigation | 243,000 |
| G. Terminal Area | 306,000 |
| H. Engineering & Administration | <u>550,000</u> |
| <i>Subtotal</i> | <i>\$4,788,020</i> |
| Match | |
| Land As Match | \$700,000 |
| Land Yet to be Donated as Match | <u>89,700</u> |
| <i>Subtotal</i> | <i>\$789,700</i> |
| Total | <u>\$14,720,605</u> |

County Employment – The airport is located in Stone County where a total of over roughly 22,700 people are employed. Of these, close to 40% (8,766) work in the four key sectors that potentially rely on general aviation for the transport of people, equipment or goods. These four sectors grew 3.6% annually over a five-year period versus 2.0% for the other sectors. This growth was led by the business and tourism sectors, which grew 5.7% and 4.7%, respectively, as summarized in **Exhibit 8-3**.

Exhibit 8-3

Employment Sector Growth– Stone County (Branson West)

Missouri Airport Investment Study

| Industry Sector | | Employment | | Avg Annual |
|----------------------|------------|---------------|---------------|------------|
| Description | SIC Codes | 1998 | 2003 | Growth |
| Key Sectors | | | | |
| Manufacturing | 20-39 | 1,064 | 1,074 | 0.2% |
| Business | 81, 87, 89 | 879 | 1,158 | 5.7% |
| Tourism | 70, 79 | 3,412 | 4,287 | 4.7% |
| Institutional | 80, 82 | <u>1,978</u> | <u>2,247</u> | 2.6% |
| Subtotal | | 7,333 | 8,766 | 3.6% |
| Other Sectors | | <u>12,602</u> | <u>13,890</u> | 2.0% |
| Total | | 19,935 | 22,656 | 2.6% |

Source: U.S. Bureau of the Census

Development and Growth – Results of the EDGE model, as shown in **Exhibit 8-4** indicate that while several industries are expanding in Stone County, many face high production costs and labor market constraints relative to the rest of Missouri, which may explain stagnant growth in the manufacturing sector employment. Conversely, growth potential is identified in the construction, business services and institutional sectors.

Potential Airport User Employment – Another source, InfoUSA, was used to obtain employment by firm in the region for firms with 20+ employees. Given the rural nature of the region, only about 65 firms were identified as potential users, most of which are in the tourism industry in Branson. The location and size of these firms relative to Branson West is shown by major industry type in **Exhibit 8-5** (actual firm employment and sales data is show in Appendix B).

Local Perspective – Discussions with the County Administrator, Mr. Ken Smith, and the Mayor, Mr. John Rhodes, indicate that the City of Branson West continues to grow, despite a high unemployment rate. Much of the employment growth has been geared towards low-wage service sector jobs at Wal-Mart, Silver Dollar City and in Branson. Well-paying, light industrial-sector jobs are few and far between, despite a resourceful and semi-skilled workforce. Further, the increasing growth of Branson West, and to a larger degree Branson, continue to generate demand for light industrial products. Based on these factors, Messrs. Smith and Rhodes believe future economic development will depend on three primary generators: Silver Dollar City, Indian Ridge Resort Community (under construction), and light industrial. These three areas and their relationship to the planned airport are discussed below.

Silver Dollar City – Discussion with Silver Dollar City's Executive Vice President, Mr. Mike Hutcherson, indicates that the amusement park primarily attracts a "rubber-tire" market that drives to the Branson West attraction. The park attracts an estimated 2.0 million visitors annually, of which approximately 250,000 purchase a multi-entrance pass (four times within a year), an additional 1.25 million live within 300 miles of the park, and the remaining 500,000 live over 300 miles away. Regarding employment, 1,200 people work at the facility in the high-

season, of which a quarter are year-round employees, a quarter are seasonal (i.e., 3-months) and half are semi-annual (9-months).

Exhibit 8-4
Economic Development & Growth Summary – Stone County (Branson West)
 Missouri Airport Investment Study

| SIC | Industry | Growth Potential | Competive Concerns | | SIC | Industry | Growth Potential | Competive Concerns | |
|-----|------------------------------------|------------------|--------------------|--------------|-----|-----------------------------------|------------------|--------------------|--------------|
| | | | Production Costs | Labor Market | | | | Production Costs | Labor Market |
| 7 | Agricultural services | | X | X | 48 | Communications | | | X |
| 8 | Forestry | | | | 49 | Electric, gas & sanitary services | X | | X |
| 9 | Fishing | | | | 50 | Wholesale trade-durable goods | X | X | XX |
| 10 | Metal mining | | | | 51 | Wholesale trade - nondurables | | | X |
| 12 | Coal mining | | X | X | 52 | Bldg materials & garden supplies | X | | X |
| 13 | Oil and gas extraction | | | | 53 | General merchandise | X | | X |
| 14 | Nonmetallic minerals, exc. fuels | | | | 54 | Foods stores | | | |
| 15 | General contractors | X | | | 55 | Auto dealers & service stations | | | X |
| 16 | Heavy construction | X | | | 56 | Apparel and accessory stores | | | |
| 17 | Special trade contractors | X | | | 57 | Furniture and home stores | X | | X |
| 20 | Food and kindred products | | | | 58 | Eating and drinking estabs | X | | |
| 21 | Tobacco products | | | X | 59 | Miscellaneous retail | X | | X |
| 22 | Textile mill products | | | | 60 | Depository institutions | | | |
| 23 | Apparel & other textile products | | X | | 61 | Nondepository institutions | X | | XX |
| 24 | Lumber and wood products | | | | 62 | Security & commodity brokers | X | | X |
| 25 | Furniture and fixtures | | X | | 63 | Insurance carriers | X | X | XX |
| 26 | Paper and allied products | | | | 64 | Insurance agents, services | X | | XX |
| 27 | Printing and publishing | | | | 65 | Real estate | | | |
| 28 | Chemicals and allied products | | X | X | 66 | Holding, investment offices | | | |
| 29 | Petroleum and coal products | | | | 70 | Hotels and other lodging | | X | |
| 30 | Rubber & misc. plastics products | | | | 72 | Personal services | | | |
| 31 | Leather and leather products | | X | | 73 | Business services | | X | X |
| 32 | Stone, Clay, and glass products | | | | 75 | Auto repair, services, parking | | X | |
| 33 | Primary metal industries | | | X | 76 | Miscellaneous repair services | | | |
| 34 | Fabricated metal products | | | | 78 | Motion pictures | X | | |
| 35 | Industrial machinery and equip. | | X | X | 79 | Amusements & recreation | | | |
| 36 | Electronic & other electric equip. | | X | X | 80 | Health services | X | | |
| 37 | Transportation equipment | | | | 81 | Legal services | X | | |
| 38 | Instruments & related products | | | | 82 | Educational services | X | X | X |
| 39 | Mis. manufacturing industries | | | | 83 | Social services | X | | XX |
| 41 | Local & interurban pass. transit | | X | X | 84 | Museums, botanical, zoos | | | |
| 42 | Trucking and warehousing | | | | 86 | Membership organizations | | | |
| 44 | Water transportation | | | | 87 | Engineering & management | | | X |
| 45 | Transportation by air | | | | 89 | Services, other | X | | X |
| 46 | Pipelines, except natural gas | | X | X | 99 | Unclassified establishments | | | |
| 47 | Transportation services | | | X | | | | | |

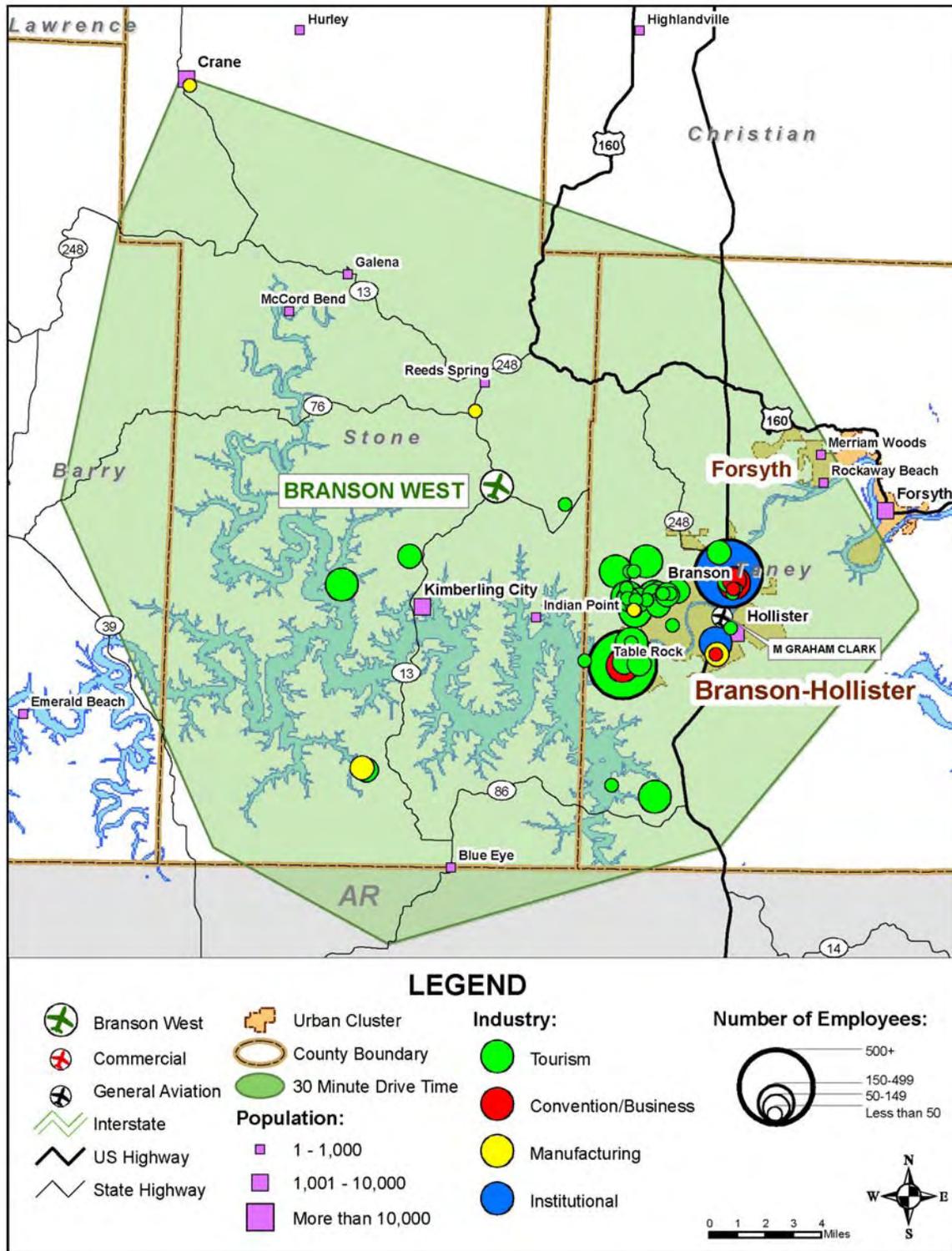
Note: "xx" in the Labor Market indicates a major concern

Source: Wilbur Smith Associates

- Tourism
- Business Services
- Manufacturing
- Institutional

Exhibit 8-5

Key Potential Airport User Firms by Industry Type – Branson West
Missouri Airport Investment Study



Mr. Hutcherson is unsure of how much business the new planned Branson West Airport will attract, but has supported airport development over the past several years. In regards to potential business development, a 5% increase in visitors originating from over 300 miles to the facility because of the convenient airport location (within five miles) would result in approximately 25,000 visitors annually. Based on an average entrance fee of \$38.00 (\$43.00 for adults, \$33.00 for children) and an average concession expenditure (i.e. food, drink, souvenirs) per visitor of \$25.00, the park would generate an additional \$1.6 million in direct revenues and employ an additional 11 direct full-time-equivalent people.

Indian Ridge Resort Community – Discussions were conducted with the resort's lead developer, Jim Shirato, to fully understand the scope and breadth of this huge, 1,000-acre development. In a nutshell, the family-oriented resort community will include a plethora of entertainment ranging from an upscale marina and golf course to high-end shopping/restaurants as well as a \$12 million aquarium, an indoor waterpark and an eight-story condo-hotel. The proposed cost of the entire new facility is estimated between \$1.4-1.6 billion and will include over 2,400 residences (1,550 single family homes and 850 condominiums) with new single home prices ranging from \$325,000 to \$4.0 million. Ground-breaking commenced in January 2006, with 5 to 10 year projects scheduled.

Given the rural nature of the area, many of the homes will either house retirees or serve as second residences. Of the 850 condominiums, it is projected that 50% will be available for rental on a daily basis at a rental price of roughly \$275 per day inclusive of waterpark access. Clearly, the rapid access provided by the envisioned Branson West Airport will facilitate development of this high-end resort and generate jobs. Such high-end users typically place a high value on time. For these reasons, Mr. Shirato believes the airport to be a key component to the resort's development success. However, he acknowledged that the development would have been undertaken even without the airport. Nonetheless, he does see the airport as a vital component to increasing the rate of development and making it significantly more attractive to its target audience.

To accommodate such a large influx of people and business in a small rural environment will require an estimated 400 people during the first two phases, and over 1,100 people by completion, with average service sector wages envisioned at \$12.00-\$14.00 per hour – far above the minimum wage. Since these employees will need housing and support services as well, the developer is subsidizing the cost of approximately 360 employee-affordable apartments as well as a day care center for children and older citizens.

While the direct impacts related to the Indian Ridge Community associated with development of the planned Branson West Airport are intuitive, quantification of the impacts proves challenging. Specifically, the affluent nature of the property owners and resort visitors combined with the remote location emphasizes the need (i.e., demand) for the quick, direct transport that only an airport such as Branson West could provide. A distinct share of such owners and visitors own or have access to private general aviation aircraft and would regularly use the planned airport at Branson West.

Light Industrial – While the rural, mountainous location far from an interstate inhibits major manufacturing opportunities for the Branson West community, light industrial manufacturing/support of the expanding tourism-driven economy is another potential growth sector. The proposed airport would provide an important resource for such industries to transport key personnel and/or critical parts/cargo. Discussions with community leaders and a regional businessman, Tom Baird, IV of Conoco, indicate a genuine interest in developing light industry around the airport. In fact, Mr. Baird's firm donated land towards the airport development. However, given the uncertainty of exactly when the planned airport will be completed inhibits speculation on potential development at or around the airport.

8.3. Economic Development Impacts and ROI

Economic development impacts associated with the planned Branson West Airport development will occur. The natural attractions of the rural mountains and lakes continue to increase demand for resort-oriented facilities and services, which in turn, induces investment. The new resort-oriented development targets the high-end vacation and second home market, who place a high value on time. The time savings of general aviation air travel afforded to such users will be significant. Additionally, as the region develops the need for just-in-time support of goods, parts and personnel will increase.

Discussions with the local government officials and key area business leaders support this diagnosis. Further, as the demand for non-commercial aviation grows, demand will arise for aviation service firms at the airport. In addition, the region's appeal will most likely give rise to the desire by an owner of a small firm to relocate a small corporate office (see Eldon Model example).

Given these observations, sufficient information is not available to specifically quantify the economic development impacts associated with the CIP, rather a breakeven economic analysis is conducted to determine what level of annual impacts would be required for the \$14.7 million short-term airport development project to recover its costs and "break-even" over a 20-year period. A qualitative assessment is then made as to whether such benefits could be expected in light of the airports activity levels, facilities and surrounding economy. The analysis assumes the capital improvements are undertaken in 2007 and 2008, with the partial benefits beginning the following year and ramping-up in the following few years before leveling out to the overall projected growth rates in years 2012 to 2026.

Economic and Tax Impacts – The breakeven-approach estimates the direct jobs required by the airport improvement to make the project feasible given a 12% discount rate over a 20-year analysis period. The approach estimates the resulting level of direct earnings and output based on an average of the industries considered to be the major potential airport users, as discussed above. Further, the state sales and income tax receipts include those resulting from both the direct and multiplier related impacts. Again, the average multipliers for those industries most likely to use the airport are used to estimate the multiplier impacts.

Future job growth is estimated at an annual rate of 20.0% in the initial 10 years, reflecting the high regional economic growth, with a more conservative annual growth of 5% the later 10 years. Based on these assumptions, the required change in direct impacts attributable to the airport improvements, both at-airport and off-airport, rises from 144 jobs in 2008 to 1,009 jobs by 2026, as shown in **Exhibit 8-6**. These annual employment requirements drive the ensuing impact and ROI estimates.

Exhibit 8-6
Direct Job Impact Requirements – Branson West Airport Development
 Missouri Airport Investment Study

| Project Year | Calendar Year | Direct Jobs | Project Year | Calendar Year | Direct Jobs |
|--------------|---------------|-------------|--------------|---------------|-------------|
| 1 | 2007 | 0 | 11 | 2017 | 650 |
| 2 | 2008 | 144 | 12 | 2018 | 683 |
| 3 | 2009 | 173 | 13 | 2019 | 717 |
| 4 | 2010 | 208 | 14 | 2020 | 753 |
| 5 | 2011 | 250 | 15 | 2021 | 791 |
| 6 | 2012 | 300 | 16 | 2022 | 831 |
| 7 | 2013 | 360 | 17 | 2023 | 873 |
| 8 | 2014 | 432 | 18 | 2024 | 917 |
| 9 | 2015 | 518 | 19 | 2025 | 963 |
| 10 | 2016 | 619 | 20 | 2026 | 1,009 |

Source: Wilbur Smith Associates

If the 144 direct jobs in 2008 are attracted to the region due to the airport construction, an additional estimated 216 multiplier related jobs would be attracted to the area.²⁷ Based on these assumptions, the total impacts for three benchmark years (2008, 2016, and 2026) are summarized in **Exhibit 8-7**, which suggests that the total jobs would rise from 360 jobs (144 direct and 216 multiplier) in 2008 to 2,523 jobs by 2026. Such economic activity levels would generate an estimated \$0.8 million in state income and sales tax receipts in 2008 and \$5.3 million by 2026.

²⁷ Multiplier impacts based on an average of IMPLAN multipliers for potential user firms.

Exhibit 8-7

Breakeven Economic Impacts and Tax Collections – Branson West Airport Development
Missouri Airport Investment Study

| | 2008 | 2016 | 2026 |
|-------------------------|----------------|------------------|------------------|
| Economic Impacts | | | |
| Direct | | | |
| Jobs | 144 | 619 | 1,009 |
| Earnings | \$6,062,400 | \$26,067,210 | \$42,478,900 |
| Output | \$19,440,000 | \$83,588,442 | \$136,215,000 |
| Multiplier | | | |
| Jobs | 216 | 929 | 1,514 |
| Earnings | \$7,020,000 | \$30,184,715 | \$49,188,750 |
| Output | \$14,040,000 | \$60,369,430 | \$98,377,500 |
| Total | | | |
| Jobs | 360 | 1,548 | 2,523 |
| Earnings | \$13,082,400 | \$56,251,925 | \$91,667,650 |
| Output | \$33,480,000 | \$143,957,872 | \$234,592,500 |
| Tax Collections | | | |
| State Income Tax | \$287,800 | \$1,237,500 | \$2,016,700 |
| State Sales Tax | <u>472,000</u> | <u>2,029,700</u> | <u>3,307,500</u> |
| Total State Taxes | \$759,800 | \$3,267,200 | \$5,324,200 |

Source: Wilbur Smith Associates

State Tax Impacts and ROI – Based on these hypothetical tax impacts, the project would “breakeven” with a marginal NPV of \$19,900, an IRR of 12% and a B/C ratio of 1.00, as shown in **Exhibit 8-8**. The calculation includes the total cost of the capital improvements, an annual increase in operating costs, and no residual value.²⁸ If a more conservative, lower discount rate of 4% were used, a significantly lower attraction of jobs would be required to generate sufficient tax revenues; specifically, 75 direct jobs in 2008 rising to 512 jobs by 2026.

The airport’s ability to attract the envisioned number of jobs under a 4% discount rate scenario appear reasonable. However, the job requirements under a 12% discount rate are extremely high compared to the existing employment levels. Nonetheless, the region is growing significantly and requires adequate air transportation access. **For these reasons, the new airport development appears to be justified.**

²⁸ Operating costs estimated at 2.5% of the capital cost; residual value assumes a 20-year project life.

**Exhibit 8-8
Breakeven Return on Investment - Branson West
Missouri Airport Investment Study**

| Proj Year | Cali Year | Airport Improvement Costs | | | Economic Development Tax Impacts | | | Present Worth Factor | Discounted Totals | | | |
|-----------|-----------|---------------------------|--------------|--------------|----------------------------------|--------------|----------|----------------------|-------------------|--------------|--------------|------------|
| | | Capital | Ops & Maint. | Total | Income Tax | Sales Tax | Residual | | Total | Costs | Benefits | Net Change |
| 0 | 2006 | -- | -- | 9,932,600 | -- | -- | -- | 1.0000 | 9,932,600 | 0 | -- | -9,932,600 |
| 1 | 2007 | \$9,932,600 | -- | 4,788,000 | 287,800 | 472,000 | -- | 0.8929 | 4,275,000 | 678,400 | 4,275,000 | -3,596,600 |
| 2 | 2008 | 4,788,000 | -- | 368,000 | 345,800 | 567,100 | -- | 0.7972 | 293,400 | 727,800 | 293,400 | 434,400 |
| 3 | 2009 | -- | 368,000 | 368,000 | 415,700 | 681,800 | -- | 0.7118 | 261,900 | 781,200 | 261,900 | 519,300 |
| 4 | 2010 | -- | 368,000 | 368,000 | 499,700 | 819,500 | -- | 0.6355 | 233,900 | 838,400 | 233,900 | 604,500 |
| 5 | 2011 | -- | 368,000 | 368,000 | 599,600 | 983,400 | -- | 0.5674 | 208,800 | 898,200 | 208,800 | 689,400 |
| 6 | 2012 | -- | 368,000 | 368,000 | 719,500 | 1,180,100 | -- | 0.5066 | 186,400 | 962,400 | 186,400 | 776,000 |
| 7 | 2013 | -- | 368,000 | 368,000 | 863,400 | 1,416,100 | -- | 0.4523 | 166,500 | 1,031,100 | 166,500 | 864,600 |
| 8 | 2014 | -- | 368,000 | 368,000 | 1,035,300 | 1,698,000 | -- | 0.4039 | 148,600 | 1,103,900 | 148,600 | 955,300 |
| 9 | 2015 | -- | 368,000 | 368,000 | 1,237,500 | 2,029,700 | -- | 0.3606 | 132,700 | 1,178,200 | 132,700 | 1,045,500 |
| 10 | 2016 | -- | 368,000 | 368,000 | 1,299,200 | 2,130,700 | -- | 0.3220 | 118,500 | 1,104,300 | 118,500 | 985,800 |
| 11 | 2017 | -- | 368,000 | 368,000 | 1,365,100 | 2,238,900 | -- | 0.2875 | 105,800 | 1,036,100 | 105,800 | 930,300 |
| 12 | 2018 | -- | 368,000 | 368,000 | 1,433,100 | 2,350,300 | -- | 0.2567 | 94,500 | 971,100 | 94,500 | 876,600 |
| 13 | 2019 | -- | 368,000 | 368,000 | 1,505,000 | 2,468,300 | -- | 0.2292 | 84,300 | 910,600 | 84,300 | 826,300 |
| 14 | 2020 | -- | 368,000 | 368,000 | 1,581,000 | 2,592,900 | -- | 0.2046 | 75,300 | 854,100 | 75,300 | 778,800 |
| 15 | 2021 | -- | 368,000 | 368,000 | 1,660,900 | 2,724,000 | -- | 0.1827 | 67,200 | 801,100 | 67,200 | 733,900 |
| 16 | 2022 | -- | 368,000 | 368,000 | 1,744,900 | 2,861,700 | -- | 0.1631 | 60,000 | 751,400 | 60,000 | 691,400 |
| 17 | 2023 | -- | 368,000 | 368,000 | 1,832,800 | 3,005,900 | -- | 0.1456 | 53,600 | 704,700 | 53,600 | 651,100 |
| 18 | 2024 | -- | 368,000 | 368,000 | 1,924,700 | 3,156,700 | -- | 0.1300 | 47,900 | 660,800 | 47,900 | 612,900 |
| 19 | 2025 | -- | 368,000 | 368,000 | 2,016,700 | 3,307,500 | -- | 0.1161 | 42,700 | 618,200 | 42,700 | 575,500 |
| 20 | 2026 | -- | 368,000 | 368,000 | -- | -- | -- | -- | -- | -- | -- | -- |
| Totals | | \$14,720,600 | \$6,624,000 | \$21,344,600 | \$22,367,700 | \$36,684,600 | \$0 | | \$16,589,600 | \$16,612,000 | \$16,589,600 | \$22,400 |

| | |
|---------------|----------|
| Discount Rate | 12% |
| NPV | \$19,900 |
| IRR | 12.0% |
| B/C Ratio | 1.00 |

Source: Wilbur Smith Associates

Section 9:
Findings and Conclusions

9. Summary and Conclusion

State aviation administrators continually face increasing demand for limited financial resources. After identifying immediate safety concerns, the challenge is to prioritize which airport capital investment projects should be funded with state assistance. Factors considered in the decision-making process include: aviation activity (i.e., aircraft operations and based aircraft), social (emergency access), and economic development (business attraction and retention). From an economic development perspective, the objective is to identify how the greatest benefit can be achieved given aviation's role compared to many other economic development factors, such as labor (availability, skill levels and rates), taxes, accessibility, etc.

Many Factors Affect Economic Development

This study addressed perspectives, approaches and tools available to evaluate the contribution that general aviation and small commercial service airports can provide to a region's overall economic development. The evaluation focused on the reality of the contributory role airports play towards economic development, and that other factors must exist in an airport's service area for airport investment to facilitate a region's overall economic development.

ROI and Breakeven Analysis

For these reasons, a definitive quantitative economic evaluation is elusive. However, a breakeven economic analysis provides a useful tool to understand the level of jobs required to justify the investment. Specifically, the approach uses a traditional economic feasibility framework to evaluate a project's return on investment (ROI). However, instead of quantifying the benefits associated with transport and operating cost savings, as typically addressed in FAA B/C analyses, this analysis compares the estimated state tax revenues to the project costs.

The different approach is taken for two fundamental reasons. First, the magnitude of transport cost savings benefits are considered minor compared to the magnitude and underlying objective of overall economic development. Second, as an operating entity continually under scrutiny, the state must concern itself with the financial implications of its actions. This analysis attempts to estimate the economic development benefits associated with the capital improvement projects, and to compare the resulting state tax revenues to the capital improvement project costs.

Benefits – The conservative approach compares the resulting state income and sales tax revenues associated with the required economic development – both the jobs directly associated with the airport improvement and the multiplier-associated jobs. However, the approach refrains from including other federal and local taxes on income, sales and property. The effective tax rate of 2.2% used to measure income tax receipts is extremely conservative compared to the marginal rate of 6%. Further, the use of a high 12% discount rate further raises the bar regarding investment decisions – use of a lower 4% discount rate, as often argued by proponents of public investments, would essentially lower the job requirement hurdle by half. In other words, use of the 12% discount rate means that a higher number of new jobs are needed for the project to be considered feasible from a ROI perspective.

Case Studies – The analysis of six airport investment projects at five different airports across the state provides a challenging context from which to evaluate the airport investment approach. The breakeven approach, used for four of the 5 airports, significantly reduces the debate over impact assumptions and provides a more contextual tool from which to evaluate the worthiness of airport infrastructure investments. So, instead of trying to identify specific airport-related impacts and defend numerous assumptions, the breakeven analysis simply identifies the level of jobs required to generate sales and income tax revenues sufficient to cover the project costs. In doing so, the direct jobs are separated from the multiplier-related jobs. This provides a finer level of detail from which to gauge the airport project's worthiness.

Study Airports

The analysis of six projects at five airports generated interesting results. The selected general aviation airports span the state and cover a wide range of operating environments. The two major urban airports, Creve Coeur in St. Louis and Lee's Summit in Kansas City, differ significantly in their market focus (recreational/enthusiast versus business, respectfully). Similarly the existing two rural airports, Monett and Eldon, also offer distinctly different market focuses and operating environments. Further, two of the airports studied concerned planned projects (Eldon and Lee's Summit), while two concerned prior projects (Monett and Creve Coeur). Lastly, an entirely new planned airport in Branson West would serve an expanding tourist region. The projects' costs also varied notably ranging from a modest \$0.4 million hangar improvement at Monett to a major \$60.4 million runway rehabilitation and extension at Lee's Summit

Study Findings

The project costs, job impacts and tax receipt benefits are summarized in **Exhibit 9-1**. The results for the two Monett projects include actual, current jobs as well as forecasted later year jobs; this was possible through discussions with airport officials and users who provided sufficient information to estimate the number of direct jobs associated with the airport improvements. Conversely, insufficient information was available at Creve Coeur to estimate any specific direct job changes in the region. For this reason, the breakeven approach was conducted at Creve Coeur as well as for the other planned projects at Eldon, Lee's Summit and Branson West.

Actual/Forecasted Findings – The two Monett Airport projects indicate that the improvement projects attracted new employment to the area, which are projected to continue generating sufficient tax revenues to cover the MoDOT investments. The runway and taxiway extensions (1999 and 2002, respectively) required a capital investment of \$2.8 million, which played the key factor in retaining a rapidly expanding local user firm. Since the investment, new employment rose from approximately 21 new jobs in 1999 to 258 new jobs in 2006, with additional growth projected to reach 372 by 2018. The second, smaller, apron expansion project cost \$0.4 million and is credited with attracting 15 new jobs at the airport in 2006. These jobs are projected to grow to 41 by project year 2015. The resulting ROI for the two projects are positive. The runway extension project generates a NPV of \$1.4 million, an IRR of 18.5%, and

a B/C ratio of 1.54. Similarly, the apron expansion project generates a NPV of \$127,800, an IRR of 15.8%, and a B/C ratio of 1.27.

Exhibit 9-1
Evaluation Summary
 Missouri Airport Investment Study

| | Monett-Rwy (1998) | Monett-Apron (2005) | Creve Coeur (2002) | Eldon | Lee's Summit | Branson West |
|--|--------------------|---------------------|--------------------|--------------------|---------------------|---------------------|
| Capital Cost | \$2,789,300 | \$439,300 | \$3,307,900 | \$2,594,900 | \$60,420,900 | \$14,720,600 |
| Actual/Forecasted Impacts and ROI | | | | | | |
| <i>Year 1</i> | | | | | | |
| Jobs | 21 | 15 | na | na | na | na |
| Tax Receipts | 75,800 | 52,000 | na | na | na | na |
| <i>Year 20</i> | | | | | | |
| Jobs | 372 | 41 | na | na | na | na |
| Tax Receipts | \$1,777,710 | \$142,000 | na | na | na | na |
| Return on Investment | | | | | | |
| NPV | \$1,395,000 | \$127,800 | na | na | na | na |
| IRR | 18.5% | 15.8% | na | na | na | na |
| B/C Ratio | 1.54 | 1.27 | na | na | na | na |
| Breakeven Impacts | | | | | | |
| 12% Discount Rate | | | | | | |
| <i>Year 1</i> | | | | | | |
| Jobs | na | na | 83 | 74 | 808 | 144 |
| Tax Receipts | na | na | \$419,200 | \$369,600 | \$4,263,500 | \$759,800 |
| <i>Year 20</i> | | | | | | |
| Jobs | na | na | 136 | 113 | 2,821 | 1,009 |
| Tax Receipts | na | na | \$252,600 | \$224,400 | \$2,258,400 | \$395,800 |
| 4% Discount Rate | | | | | | |
| <i>Year 1</i> | | | | | | |
| Jobs | na | na | 50 | 45 | 428 | 75 |
| Tax Receipts | na | na | \$252,600 | \$224,400 | \$2,258,400 | \$395,800 |
| <i>Year 20</i> | | | | | | |
| Direct Jobs | na | na | 82 | 69 | 1,494 | 512 |
| Tax Receipts | na | na | \$563,700 | \$345,200 | \$7,883,400 | \$2,701,600 |

Source: Wilbur Smith Associates

Lastly, regarding the runway extension project. Had the project not been undertaken, many of the existing jobs associated with the major user firm's operations would have been transferred to the alternative location. Doing so would have resulted in lost tax revenues. If such tax revenue losses were also considered, the project's ROI (e.g., NPV, IRR and B/C ratio), would be significantly greater.

Breakeven Findings – The four projects at the other four airports did not clearly identify specific firms that would locate or expand specifically because of the airport improvement. Rather, a host of conditions arose which varied by airport. In Eldon, for example, several companies

expressed interest in local expansion that would be enticed by a runway extension. Conversely, at Lee's Summit, many factors are driving rapid growth, which increasingly require air transport. However it was not possible to identify specific companies whose expansion primarily depended on the airport improvements. Similarly, Branson West is growing rapidly as a resort-oriented development that capitalizes on the natural beauty of the region and nearby tourist-oriented Branson area. At Creve Coeur, the recreational nature of the airport has not changed since the runway extension; no new general-aviation dependent businesses located in the region or on the airport. However, the region is in transition with notable business growth in the manufacturing, business services and tourism sectors – all of which are potential users of a top tier GA airport. Further, the other major regional GA airport, Spirit of St. Louis, is extremely busy and could approach capacity over the 20-year analysis period.

While these individual circumstances vary, the central premise holds: no regional economic development could be tied primarily to the airport improvement projects evaluated. The question then becomes an order-of-magnitude issue: what is the range of additional employment that an airport project needs to create (or significantly influence) to justify the investment. At Creve Coeur, approximately 83 new jobs would be required in the first year rising to 136 by year 20 to justify the project from a ROI perspective. This assumes a 12% discount rate. Use of a lower 4% discount rates suggests the job impact requirements range from 50 in Year 1 to 82 by Year 20.

The airport with the largest job impact requirements, Lee's Summit, suggests that the airport improvements need to attract between 428 to 808 jobs in the first year (depending on the discount rate used), to warrant the project from a ROI perspective (rising to between 1,494 to 2,821 jobs in year 20). Comparatively, the Spirit of St. Louis Airport was found to generate 1,252 on-airport jobs in 2002 (2,953 total jobs) – this excludes the many more off-airport jobs associated with the businesses that depend on the Airport.²⁹ Given the rapidly growing Lee's Summit area and the importance of general aviation access to the types of businesses locating near the Airport, the range of direct jobs requirements appears attainable.

Choosing a Project Hurdle – Lowering the discount rate from 12% to 4% effectively lowers the project feasibility hurdle in terms of required direct jobs. Therefore, the decision on which discount rate to use seriously affects the project feasibility from a ROI perspective. Evaluating both discount rates provides a range from which to evaluate a project's worthiness. Regarding Monett, the actual-forecasted jobs for both the runway extension and the apron expansion generate sufficient tax revenues to warrant the projects at the higher discount rate.

Conclusion

The breakeven analysis is an intuitive approach that provides an order-of-magnitude perspective to the decision maker on the economic development potential or need of the project. In doing so, it provides an estimate of what the state should expect in terms of income

²⁹ Missouri State Aviation System Plan, 2006

and sales tax receipts associated with project. Application of this approach on an airport-by-airport basis requires some analysis of each airport's service area and discussion with airport administrators and/or users. Use of registered flight plan data provides an extremely useful source to identify an airport's major corporate/business users, which can facilitate judgment on the likelihood that the proposed project will generate the number of jobs required to support the investment.

Finally, the detailed case study analysis shows that overarching conclusions cannot be drawn about types of airport investments. The case study methodology did not produce common results that could be applied in a simplified manner to either airports or projects. Specifically, investment in runway extensions does not guarantee economic development. Similarly, investment in urban area airports does not always yield greater benefits than rural airport investment. Rather, the potential return on airport investment principally depends on the region's rising demand for goods and services, industry composition, and its dependence on aviation. Additionally, other factors such as alternative regional airports, community reaction to airport development, airport access, etc. can significantly affect an airport project's ROI. In conclusion the study does provide a contextual framework from which to evaluate the ROI requirements of different airport investments, in different price ranges, in different urban and rural environments. This contextual framework provides a starting point from which to evaluate airport projects from a ROI perspective.

Appendix A:
EDGE Model Data

EDGE Spreadsheet - Input Form 2
Current Employment

Creve Coeur Airport

| SIC | Industry | Study Area | | | Comparison Area | | United States | | Annual Growth | |
|-----|---|----------------|----------------|-------------|------------------|------------------|-------------------|-------------------|---------------|-------------|
| | | 1998 | 2003 | Annual | 1998 | 2003 | 1998 | 2003 | Comp. | U.S. |
| | | St. Louis Co. | | Growth | Rest of Missouri | | United States | | | |
| 7 | Agricultural services | 107 | 64 | -9.8% | 1,424 | 1,606 | 187,133 | 180,673 | 2.4% | -0.7% |
| 10 | Metal mining | 458 | 507 | 2.1% | 36 | 0 | 97,039 | 83,447 | -- | -3.0% |
| 12 | Coal mining | 60 | 57 | -1.0% | 2,887 | 3,349 | 100,128 | 90,875 | 3.0% | -1.9% |
| 13 | Oil and gas extraction | 24 | 60 | 20.1% | 4,523 | 7,076 | 1,075,592 | 1,189,243 | 9.4% | 2.0% |
| 15 | General contractors | 12,613 | 2,579 | -27.2% | 56,616 | 63,811 | 3,560,214 | 3,978,770 | 2.4% | 2.2% |
| 16 | Heavy construction | 3,635 | 4,398 | 3.9% | 35,379 | 35,304 | 1,464,419 | 1,495,998 | 0.0% | 0.4% |
| 17 | Special trade contractors | 22,092 | 27,848 | 4.7% | 9 | 9 | 32,636 | 23,830 | 0.0% | -6.1% |
| 20 | Food and kindred products | 3,060 | 2,311 | -5.5% | 514 | 410 | 385,454 | 254,838 | -4.4% | -7.9% |
| 21 | Tobacco products | 60 | 41 | -7.3% | 12,255 | 4,435 | 671,184 | 303,654 | -18.4% | -14.7% |
| 22 | Textile mill products | 150 | 69 | -14.4% | 10,029 | 9,353 | 580,290 | 523,984 | -1.4% | -2.0% |
| 23 | Apparel & other textile products | 525 | 169 | -20.3% | 11,211 | 9,893 | 603,853 | 564,414 | -2.5% | -1.3% |
| 24 | Lumber and wood products | 60 | 9 | -31.6% | 11,187 | 9,298 | 567,891 | 482,232 | -3.6% | -3.2% |
| 25 | Furniture and fixtures | 419 | 274 | -8.1% | 16,405 | 13,802 | 845,053 | 700,221 | -3.4% | -3.7% |
| 26 | Paper and allied products | 2,299 | 1,848 | -4.3% | 18,177 | 13,901 | 900,706 | 841,375 | -5.2% | -1.4% |
| 27 | Printing and publishing | 6,286 | 5,469 | -2.7% | 1,304 | 1,622 | 111,000 | 98,334 | 4.5% | -2.4% |
| 28 | Chemicals and allied products | 115 | 160 | 6.8% | 17,360 | 18,175 | 1,030,378 | 921,392 | 0.9% | -2.2% |
| 29 | Petroleum and coal products | 4,476 | 5,265 | 3.3% | 3,961 | 1,847 | 79,325 | 44,113 | -14.2% | -11.1% |
| 30 | Rubber and misc. plastics products | 5,536 | 3,906 | -6.7% | 9,598 | 8,866 | 508,270 | 467,644 | -1.6% | -1.7% |
| 31 | Leather and leather products | 1,414 | 1,208 | -3.1% | 12,112 | 9,904 | 615,171 | 479,693 | -3.9% | -4.9% |
| 32 | Stone, Clay, and glass products | 1,171 | 989 | -3.3% | 36,025 | 26,064 | 1,816,198 | 1,518,266 | -6.3% | -3.5% |
| 33 | Primary metal industries | 5,258 | 6,047 | 2.8% | 25,692 | 28,379 | 1,444,438 | 1,129,140 | 2.0% | -4.8% |
| 34 | Fabricated metal products | 11,819 | 11,062 | -1.3% | 28,655 | 20,161 | 602,395 | 459,993 | -6.8% | -5.3% |
| 35 | Industrial machinery and equipment | 5,253 | 3,048 | -10.3% | 33,770 | 27,452 | 1,911,337 | 1,606,713 | -4.1% | -3.4% |
| 36 | Electronic and other electric equipment | 41,448 | 20,267 | -13.3% | 10,095 | 10,768 | 737,392 | 707,844 | 1.3% | -0.8% |
| 37 | Transportation equipment | 1,224 | 1,771 | 7.7% | -768 | -1,052 | 23,374 | 17,861 | 6.5% | -5.2% |
| 39 | Miscellaneous manufacturing industries | 3,924 | 3,762 | -0.8% | 688 | 371 | 72,754 | 67,329 | -11.6% | -1.5% |
| 41 | Local and interurban passenger transit | 1,323 | 1,337 | 0.2% | 5,748 | 5,252 | 560,023 | 533,799 | -1.8% | -1.0% |
| 42 | Trucking and warehousing | 23,826 | 24,172 | 0.3% | 339 | 366 | 49,406 | 41,003 | 1.5% | -3.7% |
| 44 | Water transportation | 180 | 81 | -14.8% | 8,378 | 9,805 | 349,343 | 397,949 | 3.2% | 2.6% |
| 45 | Transportation by air | 8,730 | 7,564 | -2.8% | 64,081 | 60,630 | 3,141,957 | 3,599,902 | -1.1% | 2.8% |
| 46 | Pipelines, except natural gas | 18 | 18 | 0.0% | 3,990 | 3,681 | 1,166,260 | 1,227,575 | -1.6% | 1.0% |
| 47 | Transportation services | 420 | 302 | -6.4% | 46,392 | 28,010 | 3,466,550 | 3,312,720 | -9.6% | -0.9% |
| 48 | Communications | 16,729 | 23,110 | 6.7% | 43,256 | 47,302 | 2,418,396 | 2,287,616 | 1.8% | -1.1% |
| 49 | Electric, gas & sanitary services | 1,442 | 1,899 | 5.7% | 21,862 | 23,878 | 1,131,161 | 1,189,772 | 1.8% | 1.0% |
| 50 | Wholesale trade - durable goods | 26,409 | 35,786 | 6.3% | 49,364 | 52,515 | 2,479,150 | 2,525,180 | 1.2% | 0.4% |
| 51 | Wholesale trade - nondurables | 13,478 | 12,066 | -2.2% | 40,389 | 39,055 | 2,943,644 | 2,883,781 | -0.7% | -0.4% |
| 52 | Bldg materials & garden supplies | 5,977 | 6,533 | 1.8% | 54,111 | 58,257 | 2,703,601 | 2,857,650 | 1.5% | 1.1% |
| 53 | General merchandise | 18,868 | 15,839 | -3.4% | 15,287 | 15,888 | 1,280,356 | 1,467,427 | 0.8% | 2.8% |
| 54 | Foods stores | 15,059 | 12,646 | -3.4% | 6,584 | 7,212 | 509,669 | 560,717 | 1.8% | 1.9% |
| 55 | Auto dealers & service stations | 14,125 | 15,085 | 1.3% | 130,585 | 147,830 | 7,758,086 | 8,635,903 | 2.5% | 2.2% |
| 56 | Apparel and accessory stores | 8,048 | 9,628 | 3.7% | 12,159 | 13,293 | 795,891 | 819,281 | 1.8% | 0.6% |
| 57 | Furniture and home stores | 3,428 | 4,507 | 5.6% | 36,601 | 37,276 | 1,920,433 | 2,081,714 | 0.4% | 1.6% |
| 58 | Eating and drinking estabs | 48,826 | 52,992 | 1.7% | 6,585 | 5,331 | 565,514 | 719,435 | -4.1% | 4.9% |
| 59 | Miscellaneous retail | 5,455 | 5,662 | 0.7% | 11,605 | 15,061 | 724,207 | 901,641 | 5.4% | 4.5% |
| 60 | Depository institutions | 8,809 | 9,129 | 0.7% | 35,752 | 37,458 | 1,532,557 | 1,509,446 | 0.9% | -0.3% |
| 61 | Nondepository institutions | 3,861 | 6,902 | 12.3% | 11,575 | 13,621 | 583,363 | 677,546 | 3.3% | 3.0% |
| 62 | Security & commodity brokers | 3,860 | 4,024 | 0.8% | 14,831 | 18,419 | 1,197,428 | 1,388,276 | 4.4% | 3.0% |
| 63 | Insurance carriers | 10,772 | 11,047 | 0.5% | 25,289 | 26,086 | 1,708,002 | 1,803,748 | 0.6% | 1.1% |
| 64 | Insurance agents, services | 4,824 | 5,690 | 3.4% | 19,941 | 20,011 | 1,247,387 | 1,309,960 | 0.1% | 1.0% |
| 65 | Real estate | 7,547 | 9,649 | 5.0% | 7,505 | 10,400 | 642,279 | 760,099 | 6.7% | 3.4% |
| 70 | Hotels and other lodging | 7,898 | 6,649 | -3.4% | -879 | 58 | 198,767 | 225,419 | -158.1% | 2.5% |
| 72 | Personal services | 8,587 | 9,460 | 2.0% | 3,352 | 2,879 | 281,701 | 283,797 | -3.0% | 0.1% |
| 73 | Business services | 7,182 | 7,460 | 0.8% | 17,163 | 20,659 | 1,175,221 | 1,318,419 | 3.8% | 2.3% |
| 75 | Auto repair, services, parking | 7,817 | 8,871 | 2.6% | 221,760 | 232,137 | 12,004,643 | 13,283,513 | 0.9% | 2.0% |
| 76 | Miscellaneous repair services | 1,408 | 2,256 | 9.9% | 15,945 | 18,047 | 1,049,313 | 1,182,581 | 2.5% | 2.4% |
| 78 | Motion pictures | 1,441 | 986 | -7.3% | 43,026 | 50,769 | 2,323,744 | 2,776,615 | 3.4% | 3.6% |
| 79 | Amusements & recreation | 12,583 | 7,981 | -8.7% | 32,407 | 39,551 | 1,753,353 | 2,188,670 | 4.1% | 4.5% |
| 80 | Health services | 66,287 | 69,767 | 1.0% | 1,322 | 1,990 | 96,511 | 119,999 | 8.5% | 4.5% |
| 81 | Legal services | 4,121 | 3,978 | -0.7% | 44,133 | 51,194 | 2,487,606 | 2,752,558 | 3.0% | 2.0% |
| 82 | Educational services | 14,909 | 17,287 | 3.0% | 12,840 | 15,501 | 1,397,009 | 1,673,514 | 3.8% | 3.7% |
| 83 | Social services | 8,941 | 10,406 | 3.1% | 108,482 | 114,386 | 5,037,866 | 5,367,166 | 1.1% | 1.3% |
| 84 | Museums, botanical, zoos | 197 | 294 | 8.3% | 668 | 2,697 | 77,642 | 46,352 | 32.2% | -9.8% |
| 86 | Membership organizations | 16,239 | 17,699 | 1.7% | 27,551 | 40,670 | 2,062,501 | 2,752,558 | 8.1% | 5.9% |
| 87 | Engineering & management | 10,395 | 10,406 | 0.0% | 27,343 | 19,719 | 2,589,839 | 1,673,514 | -6.3% | -8.4% |
| 89 | Services, other | 8,580 | 12,940 | 8.6% | 620 | 4,997 | 84,960 | 547,318 | 51.8% | 45.1% |
| 99 | Unclassified establishments | 202 | 292 | 7.6% | 991 | 556 | 64,441 | 46,352 | -10.9% | -6.4% |
| | TOTAL | 562,287 | 565,588 | 0.1% | 1,588,077 | 1,637,251 | 93,583,404 | 97,962,361 | 0.6% | 0.9% |

EDGE Spreadsheet - Input Form 2
Current Employment

Eldon Model Airpark

| SIC | Industry | Study Area | | | Comparison Area | | United States | | Annual Growth | |
|--------------|---|---------------|---------------|---------------|------------------|------------------|-------------------|-------------------|---------------|-------------|
| | | 1998 | 2003 | Annual Growth | 1998 | 2003 | 1998 | 2003 | Comp. | U.S. |
| | | Miller Co. | | | Rest of Missouri | | United States | | | |
| 7 | Agricultural services | 37 | 5 | -33.0% | 22,326 | 1,652 | 187,133 | 180,673 | -40.6% | -0.7% |
| 10 | Metal mining | 23 | 60 | 21.1% | 4,021 | 60 | 97,039 | 83,447 | -56.9% | -3.0% |
| 12 | Coal mining | 27 | 60 | 17.3% | 10,552 | 3,750 | 100,128 | 90,875 | -18.7% | -1.9% |
| 13 | Oil and gas extraction | 0 | 0 | -- | 12,805 | 9,044 | 1,075,592 | 1,189,243 | -6.7% | 2.0% |
| 15 | General contractors | 55 | 94 | 11.1% | 34,338 | 85,092 | 3,560,214 | 3,978,770 | 19.9% | 2.2% |
| 16 | Heavy construction | 97 | 88 | -1.9% | 32,983 | 37,355 | 1,464,419 | 1,495,998 | 2.5% | 0.4% |
| 17 | Special trade contractors | 528 | 567 | 1.4% | 71,640 | 9 | 32,636 | 23,830 | -83.4% | -6.1% |
| 20 | Food and kindred products | 768 | 19 | -52.3% | 13,449 | 451 | 385,454 | 254,838 | -49.3% | -7.9% |
| 21 | Tobacco products | 60 | 9 | -31.6% | 175 | 4,432 | 671,184 | 303,654 | 90.9% | -14.7% |
| 22 | Textile mill products | 0 | 7 | -- | 82,092 | 9,403 | 580,290 | 523,984 | -35.2% | -2.0% |
| 23 | Apparel & other textile products | 390 | 112 | -22.1% | 863 | 11,470 | 603,853 | 564,414 | 67.8% | -1.3% |
| 24 | Lumber and wood products | 255 | 122 | -13.7% | 14,478 | 10,593 | 567,891 | 482,232 | -6.1% | -3.2% |
| 25 | Furniture and fixtures | 37 | 49 | 5.8% | 348 | 18,474 | 845,053 | 700,221 | 121.3% | -3.7% |
| 26 | Paper and allied products | 0 | 0 | -- | 8,403 | 18,767 | 900,706 | 841,375 | 17.4% | -1.4% |
| 27 | Printing and publishing | 12 | 45 | 30.3% | 77,220 | 1,773 | 111,000 | 98,334 | -53.0% | -2.4% |
| 28 | Chemicals and allied products | 9 | 9 | 0.0% | 5,212 | 21,187 | 1,030,378 | 921,392 | 32.4% | -2.2% |
| 29 | Petroleum and coal products | 0 | 0 | -- | 71,100 | 1,856 | 79,325 | 44,113 | -51.8% | -11.1% |
| 30 | Rubber and misc. plastics products | 0 | 0 | -- | 55,452 | 9,667 | 508,270 | 467,644 | -29.5% | -1.7% |
| 31 | Leather and leather products | 0 | 0 | -- | 26,508 | 10,677 | 615,171 | 479,693 | -16.6% | -4.9% |
| 32 | Stone, Clay, and glass products | 38 | 0 | -100.0% | 64,299 | 31,377 | 1,816,198 | 1,518,266 | -13.4% | -3.5% |
| 33 | Primary metal industries | 76 | 0 | -100.0% | 52,495 | 34,612 | 1,444,438 | 1,129,140 | -8.0% | -4.8% |
| 34 | Fabricated metal products | 275 | 9 | -49.5% | 65,412 | 22,254 | 602,395 | 459,993 | -19.4% | -5.3% |
| 35 | Industrial machinery and equipment | 27 | 0 | -100.0% | 22,131 | 43,886 | 1,911,337 | 1,606,713 | 14.7% | -3.4% |
| 36 | Electronic and other electric equipment | 750 | 750 | 0.0% | 9,546 | 13,645 | 737,392 | 707,844 | 7.4% | -0.8% |
| 37 | Transportation equipment | 109 | 9 | -39.3% | 170,301 | 175 | 23,374 | 17,861 | -74.7% | -5.2% |
| 39 | Miscellaneous manufacturing industries | 392 | 13 | -49.4% | 44,528 | 452 | 72,754 | 67,329 | -60.1% | -1.5% |
| 41 | Local and interurban passenger transit | 0 | 0 | -- | 10,289 | 12,807 | 560,023 | 533,799 | 4.5% | -1.0% |
| 42 | Trucking and warehousing | 413 | 311 | -5.5% | 15,346 | 375 | 49,406 | 41,003 | -52.4% | -3.7% |
| 44 | Water transportation | 0 | 0 | -- | 46,304 | 9,886 | 349,343 | 397,949 | -26.6% | 2.6% |
| 45 | Transportation by air | 0 | 0 | -- | 15,873 | 79,890 | 3,141,957 | 3,599,902 | 38.2% | 2.8% |
| 46 | Pipelines, except natural gas | 0 | 0 | -- | 21,808 | 5,244 | 1,166,260 | 1,227,575 | -24.8% | 1.0% |
| 47 | Transportation services | 9 | 69 | 50.3% | 31,875 | 62,119 | 3,466,550 | 3,312,720 | 14.3% | -0.9% |
| 48 | Communications | 177 | 3,011 | 76.3% | 27,104 | 58,028 | 2,418,396 | 2,287,616 | 16.4% | -1.1% |
| 49 | Electric, gas & sanitary services | 20 | 9 | -14.8% | 13,422 | 28,405 | 1,131,161 | 1,189,772 | 16.2% | 1.0% |
| 50 | Wholesale trade - durable goods | 167 | 88 | -12.0% | 26,767 | 64,691 | 2,479,150 | 2,525,180 | 19.3% | 0.4% |
| 51 | Wholesale trade - nondurables | 321 | 58 | -29.0% | 212 | 48,927 | 2,943,644 | 2,883,781 | 196.9% | -0.4% |
| 52 | Bldg materials & garden supplies | 243 | 261 | 1.4% | 4,566 | 69,711 | 2,703,601 | 2,857,650 | 72.5% | 1.1% |
| 53 | General merchandise | 410 | 175 | -15.7% | 27,227 | 24,125 | 1,280,356 | 1,467,427 | -2.4% | 2.8% |
| 54 | Foods stores | 653 | 251 | -17.4% | 280,450 | 10,978 | 509,669 | 560,717 | -47.7% | 1.9% |
| 55 | Auto dealers & service stations | 889 | 521 | -10.1% | 19,708 | 189,466 | 7,758,086 | 8,635,903 | 57.2% | 2.2% |
| 56 | Apparel and accessory stores | 49 | 26 | -11.9% | 55,740 | 17,758 | 795,891 | 819,281 | -20.4% | 0.6% |
| 57 | Furniture and home stores | 30 | 45 | 8.4% | 39,538 | 45,295 | 1,920,433 | 2,081,714 | 2.8% | 1.6% |
| 58 | Eating and drinking estabs | 819 | 663 | -4.1% | 1,495 | 11,280 | 565,514 | 719,435 | 49.8% | 4.9% |
| 59 | Miscellaneous retail | 68 | 53 | -4.9% | 58,275 | 18,717 | 724,207 | 901,641 | -20.3% | 4.5% |
| 60 | Depository institutions | 215 | 175 | -4.0% | 22,155 | 48,331 | 1,532,557 | 1,509,446 | 16.9% | -0.3% |
| 61 | Nondepository institutions | 10 | 0 | -100.0% | 112,301 | 18,834 | 583,363 | 677,546 | -30.0% | 3.0% |
| 62 | Security & commodity brokers | 37 | 217 | 42.4% | 805 | 27,098 | 1,197,428 | 1,388,276 | 102.0% | 3.0% |
| 63 | Insurance carriers | 27 | 9 | -19.7% | 32,585 | 32,091 | 1,708,002 | 1,803,748 | -0.3% | 1.1% |
| 64 | Insurance agents, services | 95 | 60 | -8.8% | 27,078 | 27,634 | 1,247,387 | 1,309,960 | 0.4% | 1.0% |
| 65 | Real estate | 74 | 94 | 4.9% | 13,414 | 16,812 | 642,279 | 760,099 | 4.6% | 3.4% |
| 70 | Hotels and other lodging | 798 | 214 | -23.1% | 205 | 1,875 | 198,767 | 225,419 | 55.7% | 2.5% |
| 72 | Personal services | 129 | 119 | -1.6% | 4,565 | 3,719 | 281,701 | 283,797 | -4.0% | 0.1% |
| 73 | Business services | 15 | 9 | -9.7% | 27,278 | 25,297 | 1,175,221 | 1,318,419 | -1.5% | 2.3% |
| 75 | Auto repair, services, parking | 136 | 90 | -7.9% | 279,852 | 292,547 | 12,004,643 | 13,283,513 | 0.9% | 2.0% |
| 76 | Miscellaneous repair services | 21 | 17 | -4.1% | 19,681 | 21,560 | 1,049,313 | 1,182,581 | 1.8% | 2.4% |
| 78 | Motion pictures | 0 | 0 | -- | 55,740 | 65,669 | 2,323,744 | 2,776,615 | 3.3% | 3.6% |
| 79 | Amusements & recreation | 117 | 193 | 10.5% | 39,448 | 47,922 | 1,753,353 | 2,188,670 | 4.0% | 4.5% |
| 80 | Health services | 574 | 601 | 0.9% | 1,495 | 2,248 | 96,511 | 119,999 | 8.5% | 4.5% |
| 81 | Legal services | 78 | 69 | -2.4% | 58,218 | 65,905 | 2,487,606 | 2,752,558 | 2.5% | 2.0% |
| 82 | Educational services | 28 | 450 | 74.3% | 22,257 | 24,449 | 1,397,009 | 1,673,514 | 1.9% | 3.7% |
| 83 | Social services | 205 | 116 | -10.8% | 112,301 | 120,958 | 5,037,866 | 5,367,166 | 1.5% | 1.3% |
| 84 | Museums, botanical, zoos | 9 | 0 | -100.0% | 802 | 2,916 | 77,642 | 46,352 | 29.5% | -9.8% |
| 86 | Membership organizations | 276 | 127 | -14.4% | 27,551 | 40,670 | 2,062,501 | 2,752,558 | 8.1% | 5.9% |
| 87 | Engineering & management | 147 | 139 | -1.1% | 27,343 | 19,719 | 2,589,839 | 1,673,514 | -6.3% | -8.4% |
| 89 | Services, other | 386 | 2,618 | 46.6% | 620 | 4,997 | 84,960 | 547,318 | 51.8% | 45.1% |
| 99 | Unclassified establishments | 51 | 55 | 1.5% | 991 | 556 | 64,441 | 46,352 | -10.9% | -6.4% |
| TOTAL | | 11,661 | 12,940 | 2.1% | 2,555,361 | 2,071,622 | 93,583,404 | 97,962,361 | -4.1% | 0.9% |

EDGE Spreadsheet - Input Form 2
Current Employment

Lee's Summit Municipal Airport

| SIC | Industry | Study Area | | | Comparison Area | | United States | | Annual Growth | |
|--------------|---|-------------|---------|---------------|------------------|-----------|---------------|-------------|---------------|--------|
| | | 1998 | 2003 | Annual Growth | 1998 | 2003 | 1998 | 2003 | Comp. | U.S. |
| | | Jackson Co. | | | Rest of Missouri | | United States | | | |
| 7 | Agricultural services | 70 | 44 | -8.9% | 1,452 | 1,613 | 187,133 | 180,673 | 2.1% | -0.7% |
| 8 | Forestry | 86 | 119 | 6.7% | 4,314 | 3,865 | 225,303 | 184,423 | -2.2% | -3.9% |
| 9 | Fishing | 0 | 0 | -- | 60 | 19 | 81,272 | 68,685 | -20.5% | -3.3% |
| 10 | Metal mining | 16 | 9 | -10.9% | 44 | 51 | 97,039 | 83,447 | 3.0% | -3.0% |
| 12 | Coal mining | 60 | 66 | 1.9% | 3,196 | 3,684 | 100,128 | 90,875 | 2.9% | -1.9% |
| 13 | Oil and gas extraction | 926 | 743 | -4.3% | 5,757 | 8,395 | 1,075,592 | 1,189,243 | 7.8% | 2.0% |
| 14 | Nonmetallic minerals, exc. fuels | 1,312 | 2,401 | 12.8% | 11,645 | 15,166 | 803,924 | 910,946 | 5.4% | 2.5% |
| 15 | General contractors | 14,012 | 14,518 | 0.7% | 60,480 | 71,141 | 3,560,214 | 3,978,770 | 3.3% | 2.2% |
| 16 | Heavy construction | 1,942 | 2,543 | 5.5% | 36,376 | 34,831 | 1,464,419 | 1,495,998 | -0.9% | 0.4% |
| 17 | Special trade contractors | 9 | 9 | 0.0% | 0 | 0 | 32,636 | 23,830 | -- | -6.1% |
| 20 | Food and kindred products | 60 | 60 | 0.0% | 595 | 410 | 385,454 | 254,838 | -7.2% | -7.9% |
| 21 | Tobacco products | 488 | 176 | -18.5% | 11,937 | 4,368 | 671,184 | 303,654 | -18.2% | -14.7% |
| 22 | Textile mill products | 279 | 99 | -18.7% | 9,985 | 9,426 | 580,290 | 523,984 | -1.1% | -2.0% |
| 23 | Apparel & other textile products | 1,215 | 1,034 | -3.2% | 11,020 | 10,455 | 603,853 | 564,414 | -1.0% | -1.3% |
| 24 | Lumber and wood products | 2,953 | 2,518 | -3.1% | 10,095 | 8,075 | 567,891 | 482,232 | -4.4% | -3.2% |
| 25 | Furniture and fixtures | 3,252 | 2,796 | -3.0% | 18,827 | 15,687 | 845,053 | 700,221 | -3.6% | -3.7% |
| 26 | Paper and allied products | 3,750 | 2,648 | -6.7% | 18,576 | 16,119 | 900,706 | 841,375 | -2.8% | -1.4% |
| 27 | Printing and publishing | 175 | 368 | 16.0% | 1,235 | 1,405 | 111,000 | 98,334 | 2.6% | -2.4% |
| 28 | Chemicals and allied products | 2,220 | 1,651 | -5.8% | 19,205 | 19,536 | 1,030,378 | 921,392 | 0.3% | -2.2% |
| 29 | Petroleum and coal products | 60 | 60 | 0.0% | 3,961 | 1,796 | 79,325 | 44,113 | -14.6% | -11.1% |
| 30 | Rubber and misc. plastics products | 663 | 756 | 2.7% | 9,889 | 8,911 | 508,270 | 467,644 | -2.1% | -1.7% |
| 31 | Leather and leather products | 1,408 | 219 | -31.1% | 11,397 | 10,458 | 615,171 | 479,693 | -1.7% | -4.9% |
| 32 | Stone, Clay, and glass products | 8,414 | 4,556 | -11.5% | 32,024 | 26,830 | 1,816,198 | 1,518,266 | -3.5% | -3.5% |
| 33 | Primary metal industries | 3,747 | 5,369 | 7.5% | 30,600 | 29,243 | 1,444,438 | 1,129,140 | -0.9% | -4.8% |
| 34 | Fabricated metal products | 2,961 | 2,658 | -2.1% | 30,772 | 20,346 | 602,395 | 459,993 | -7.9% | -5.3% |
| 35 | Industrial machinery and equipment | 1,589 | 2,504 | 9.5% | 70,151 | 41,391 | 1,911,337 | 1,606,713 | -10.0% | -3.4% |
| 36 | Electronic and other electric equipment | 1,539 | 1,759 | 2.7% | 12,110 | 11,899 | 737,392 | 707,844 | -0.4% | -0.8% |
| 37 | Transportation equipment | 1,435 | 1,356 | -1.1% | -1,260 | -1,181 | 23,374 | 17,861 | -1.3% | -5.2% |
| 38 | Instruments and related products | 8,205 | 7,581 | -1.6% | 74,173 | 83,514 | 3,462,472 | 4,067,935 | 2.4% | 3.3% |
| 39 | Miscellaneous manufacturing industries | 9 | 0 | -100.0% | 854 | 452 | 72,754 | 67,329 | -11.9% | -1.5% |
| 41 | Local and interurban passenger transit | 19 | 19 | 0.0% | 14,459 | 12,788 | 560,023 | 533,799 | -2.4% | -1.0% |
| 42 | Trucking and warehousing | 9 | 9 | 0.0% | 339 | 366 | 49,406 | 41,003 | 1.5% | -3.7% |
| 44 | Water transportation | 37 | 128 | 28.2% | 8,366 | 9,758 | 349,343 | 397,949 | 3.1% | 2.6% |
| 45 | Transportation by air | 27,590 | 24,828 | -2.1% | 49,747 | 55,158 | 3,141,957 | 3,599,902 | 2.1% | 2.8% |
| 46 | Pipelines, except natural gas | 695 | 675 | -0.6% | 4,519 | 4,578 | 1,166,260 | 1,227,575 | 0.3% | 1.0% |
| 47 | Transportation services | 11,877 | 9,461 | -4.4% | 59,297 | 52,746 | 3,466,550 | 3,312,720 | -2.3% | -0.9% |
| 48 | Communications | 7,864 | 20,420 | 21.0% | 47,684 | 37,666 | 2,418,396 | 2,287,616 | -4.6% | -1.1% |
| 49 | Electric, gas & sanitary services | 3,283 | 2,881 | -2.6% | 23,309 | 25,785 | 1,131,161 | 1,189,772 | 2.0% | 1.0% |
| 50 | Wholesale trade - durable goods | 8,004 | 7,187 | -2.1% | 56,470 | 57,679 | 2,479,150 | 2,525,180 | 0.4% | 0.4% |
| 51 | Wholesale trade - nondurables | 6,703 | 6,472 | -0.7% | 46,056 | 42,706 | 2,943,644 | 2,883,781 | -1.5% | -0.4% |
| 52 | Bldg materials & garden supplies | 7,540 | 7,500 | -0.1% | 58,297 | 62,732 | 2,703,601 | 2,857,650 | 1.5% | 1.1% |
| 53 | General merchandise | 3,197 | 3,580 | 2.3% | 18,948 | 20,571 | 1,280,356 | 1,467,427 | 1.7% | 2.8% |
| 54 | Foods stores | 1,156 | 1,321 | 2.7% | 8,399 | 9,702 | 509,669 | 560,717 | 2.9% | 1.9% |
| 55 | Auto dealers & service stations | 23,988 | 25,274 | 1.0% | 146,688 | 164,855 | 7,758,086 | 8,635,903 | 2.4% | 2.2% |
| 56 | Apparel and accessory stores | 2,494 | 2,330 | -1.4% | 14,233 | 15,481 | 795,891 | 819,281 | 1.7% | 0.6% |
| 57 | Furniture and home stores | 8,460 | 7,801 | -1.6% | 36,187 | 37,669 | 1,920,433 | 2,081,714 | 0.8% | 1.6% |
| 58 | Eating and drinking estabs | 1,454 | 1,195 | -3.8% | 8,836 | 10,094 | 565,514 | 719,435 | 2.7% | 4.9% |
| 59 | Miscellaneous retail | 7,500 | 6,266 | -3.5% | 7,855 | 12,545 | 724,207 | 901,641 | 9.8% | 4.5% |
| 60 | Depository institutions | 8,329 | 7,004 | -3.4% | 37,984 | 41,336 | 1,532,557 | 1,509,446 | 1.7% | -0.3% |
| 61 | Nondepository institutions | 2,990 | 3,775 | 4.8% | 12,943 | 15,119 | 583,363 | 677,546 | 3.2% | 3.0% |
| 62 | Security & commodity brokers | 4,003 | 4,110 | 0.5% | 17,835 | 23,082 | 1,197,428 | 1,388,276 | 5.3% | 3.0% |
| 63 | Insurance carriers | 4,373 | 3,926 | -2.1% | 28,252 | 28,379 | 1,708,002 | 1,803,748 | 0.1% | 1.1% |
| 64 | Insurance agents, services | 5,193 | 4,790 | -1.6% | 21,965 | 22,963 | 1,247,387 | 1,309,960 | 0.9% | 1.0% |
| 65 | Real estate | 1,930 | 2,230 | 2.9% | 11,493 | 14,591 | 642,279 | 760,099 | 4.9% | 3.4% |
| 67 | Holding, investment offices | 3,775 | 3,465 | -1.7% | 23,044 | 23,768 | 1,302,873 | 1,304,648 | 0.6% | 0.0% |
| 70 | Hotels and other lodging | 794 | 615 | -5.0% | -579 | 1,288 | 198,767 | 225,419 | -217.3% | 2.5% |
| 72 | Personal services | 815 | 646 | -4.5% | 3,751 | 3,073 | 281,701 | 283,797 | -3.9% | 0.1% |
| 73 | Business services | 3,419 | 3,263 | -0.9% | 23,868 | 22,209 | 1,175,221 | 1,318,419 | -1.4% | 2.3% |
| 75 | Auto repair, services, parking | 41,309 | 40,667 | -0.3% | 239,393 | 252,280 | 12,004,643 | 13,283,513 | 1.1% | 2.0% |
| 76 | Miscellaneous repair services | 5,896 | 6,332 | 1.4% | 13,838 | 15,297 | 1,049,313 | 1,182,581 | 2.0% | 2.4% |
| 78 | Motion pictures | 6,220 | 7,493 | 3.8% | 49,539 | 58,199 | 2,323,744 | 2,776,615 | 3.3% | 3.6% |
| 79 | Amusements & recreation | 5,658 | 6,286 | 2.1% | 33,940 | 41,752 | 1,753,353 | 2,188,670 | 4.2% | 4.5% |
| 80 | Health services | 393 | 666 | 11.1% | 1,102 | 1,582 | 96,511 | 119,999 | 7.5% | 4.5% |
| 81 | Legal services | 10,815 | 12,410 | 2.8% | 47,539 | 53,622 | 2,487,606 | 2,752,558 | 2.4% | 2.0% |
| 82 | Educational services | 4,536 | 5,604 | 4.3% | 17,739 | 18,935 | 1,397,009 | 1,673,514 | 1.3% | 3.7% |
| 83 | Social services | 1,134 | 1,068 | -1.2% | 111,197 | 119,950 | 5,037,866 | 5,367,166 | 1.5% | 1.3% |
| 84 | Museums, botanical, zoos | 84 | 160 | 13.8% | 723 | 2,775 | 77,642 | 46,352 | -9.8% | -9.8% |
| 86 | Membership organizations | 94 | 191 | 15.2% | 27,551 | 40,670 | 2,062,501 | 2,752,558 | 5.9% | 5.9% |
| 87 | Engineering & management | 23 | 0 | -100.0% | 27,343 | 19,719 | 2,589,839 | 1,673,514 | -8.4% | -8.4% |
| 89 | Services, other | 0 | 377 | -- | 620 | 4,997 | 84,960 | 547,318 | 45.1% | 45.1% |
| 99 | Unclassified establishments | 6 | 0 | -100.0% | 991 | 556 | 64,441 | 46,352 | -6.4% | -6.4% |
| TOTAL | | 296,514 | 301,045 | 0.3% | 1,861,230 | 1,916,926 | 99,459,248 | 104,498,998 | 0.6% | 0.9% |

EDGE Spreadsheet - Input Form 2
Current Employment

Monett Municipal Airport

| SIC | Industry | Study Area | | | Comparison Area | | United States | | Annual Growth | |
|--------------|---|---------------|---------------|---------------|------------------|------------------|-------------------|-------------------|---------------|-------------|
| | | 1998 | 2003 | Annual Growth | 1998 | 2003 | 1998 | 2003 | Comp. | U.S. |
| | | Barry Co. | | | Rest of Missouri | | United States | | | |
| 7 | Agricultural services | 49 | 36 | -6.0% | 1,482 | 1,648 | 187,133 | 180,673 | 2.1% | -0.7% |
| 10 | Metal mining | 117 | 130 | 2.1% | 55 | 40 | 97,039 | 83,447 | -6.2% | -3.0% |
| 12 | Coal mining | 108 | 60 | -11.1% | 3,247 | 3,730 | 100,128 | 90,875 | 2.8% | -1.9% |
| 13 | Oil and gas extraction | 5 | 20 | 32.0% | 6,653 | 9,108 | 1,075,592 | 1,189,243 | 6.5% | 2.0% |
| 15 | General contractors | 103 | 75 | -6.1% | 74,360 | 85,436 | 3,560,214 | 3,978,770 | 2.8% | 2.2% |
| 16 | Heavy construction | 297 | 475 | 9.8% | 36,155 | 35,363 | 1,464,419 | 1,495,998 | -0.4% | 0.4% |
| 17 | Special trade contractors | 584 | 742 | 4.9% | 9 | 9 | 32,636 | 23,830 | 0.0% | -6.1% |
| 20 | Food and kindred products | 2,880 | 3,033 | 1.0% | 646 | 461 | 385,454 | 254,838 | -6.5% | -7.9% |
| 21 | Tobacco products | 0 | 0 | -- | 12,365 | 4,484 | 671,184 | 303,654 | -18.4% | -14.7% |
| 22 | Textile mill products | 0 | 0 | -- | 10,243 | 9,519 | 580,290 | 523,984 | -1.5% | -2.0% |
| 23 | Apparel & other textile products | 129 | 120 | -1.4% | 12,226 | 11,480 | 603,853 | 564,414 | -1.3% | -1.3% |
| 24 | Lumber and wood products | 189 | 182 | -0.8% | 13,048 | 10,593 | 567,891 | 482,232 | -4.1% | -3.2% |
| 25 | Furniture and fixtures | 1,823 | 1,868 | 0.5% | 22,019 | 18,443 | 845,053 | 700,221 | -3.5% | -3.7% |
| 26 | Paper and allied products | 0 | 258 | -- | 22,317 | 18,758 | 900,706 | 841,375 | -3.4% | -1.4% |
| 27 | Printing and publishing | 295 | 239 | -4.1% | 1,410 | 1,773 | 111,000 | 98,334 | 4.7% | -2.4% |
| 28 | Chemicals and allied products | 244 | 75 | -21.0% | 21,425 | 21,187 | 1,030,378 | 921,392 | -0.2% | -2.2% |
| 29 | Petroleum and coal products | 0 | 0 | -- | 3,271 | 1,681 | 79,325 | 44,113 | -12.5% | -11.1% |
| 30 | Rubber and misc. plastics products | 18 | 39 | 16.7% | 10,492 | 9,607 | 508,270 | 467,644 | -1.7% | -1.7% |
| 31 | Leather and leather products | 914 | 395 | -15.4% | 12,452 | 10,269 | 615,171 | 479,693 | -3.8% | -4.9% |
| 32 | Stone, Clay, and glass products | 129 | 139 | 1.5% | 38,247 | 29,435 | 1,816,198 | 1,518,266 | -5.1% | -3.5% |
| 33 | Primary metal industries | 362 | 1,158 | 26.2% | 33,597 | 33,862 | 1,444,438 | 1,129,140 | 0.2% | -4.8% |
| 34 | Fabricated metal products | 3,387 | 2,562 | -5.4% | 33,733 | 23,004 | 602,395 | 459,993 | -7.4% | -5.3% |
| 35 | Industrial machinery and equipment | 824 | 791 | -0.8% | 71,680 | 43,720 | 1,911,337 | 1,606,713 | -9.4% | -3.4% |
| 36 | Electronic and other electric equipment | 1,759 | 175 | -37.0% | 13,274 | 13,110 | 737,392 | 707,844 | -0.2% | -0.8% |
| 37 | Transportation equipment | 244 | 380 | 9.3% | 145 | 145 | 23,374 | 17,861 | 0.0% | -5.2% |
| 39 | Miscellaneous manufacturing industries | 1,125 | 1,102 | -0.4% | 863 | 452 | 72,754 | 67,329 | -12.1% | -1.5% |
| 41 | Local and interurban passenger transit | 121 | 74 | -9.4% | 14,478 | 12,807 | 560,023 | 533,799 | -2.4% | -1.0% |
| 42 | Trucking and warehousing | 1,612 | 1,020 | -8.7% | 348 | 375 | 49,406 | 41,003 | 1.5% | -3.7% |
| 44 | Water transportation | 0 | 0 | -- | 8,403 | 9,886 | 349,343 | 397,949 | 3.3% | 2.6% |
| 45 | Transportation by air | 0 | 0 | -- | 77,215 | 78,994 | 3,141,957 | 3,599,902 | 0.5% | 2.8% |
| 46 | Pipelines, except natural gas | 18 | 18 | 0.0% | 5,212 | 5,244 | 1,166,260 | 1,227,575 | 0.1% | 1.0% |
| 47 | Transportation services | 221 | 463 | 15.9% | 71,059 | 61,863 | 3,466,550 | 3,312,720 | -2.7% | -0.9% |
| 48 | Communications | 440 | 1,332 | 24.8% | 55,474 | 58,026 | 2,418,396 | 2,287,616 | 0.9% | -1.1% |
| 49 | Electric, gas & sanitary services | 65 | 74 | 2.6% | 26,469 | 28,517 | 1,131,161 | 1,189,772 | 1.5% | 1.0% |
| 50 | Wholesale trade - durable goods | 300 | 461 | 9.0% | 64,176 | 64,116 | 2,479,150 | 2,525,180 | 0.0% | 0.4% |
| 51 | Wholesale trade - nondurables | 497 | 457 | -1.7% | 52,415 | 48,904 | 2,943,644 | 2,883,781 | -1.4% | -0.4% |
| 52 | Bldg materials & garden supplies | 396 | 471 | 3.5% | 65,403 | 69,824 | 2,703,601 | 2,857,650 | 1.3% | 1.1% |
| 53 | General merchandise | 873 | 1,300 | 8.3% | 22,079 | 24,091 | 1,280,356 | 1,467,427 | 1.8% | 2.8% |
| 54 | Food stores | 835 | 791 | -1.1% | 9,522 | 10,963 | 509,669 | 560,717 | 2.9% | 1.9% |
| 55 | Auto dealers & service stations | 1,304 | 1,259 | -0.7% | 170,448 | 189,346 | 7,758,086 | 8,635,903 | 2.1% | 2.2% |
| 56 | Apparel and accessory stores | 146 | 76 | -12.2% | 16,710 | 17,796 | 795,891 | 819,281 | 1.3% | 0.6% |
| 57 | Furniture and home stores | 102 | 99 | -0.6% | 44,415 | 45,264 | 1,920,433 | 2,081,714 | 0.4% | 1.6% |
| 58 | Eating and drinking estabs | 2,272 | 2,785 | 4.2% | 10,281 | 11,280 | 565,514 | 719,435 | 1.9% | 4.9% |
| 59 | Miscellaneous retail | 152 | 182 | 3.7% | 15,346 | 18,801 | 724,207 | 901,641 | 4.1% | 4.5% |
| 60 | Depository institutions | 582 | 516 | -2.4% | 46,283 | 48,331 | 1,532,557 | 1,509,446 | 0.9% | -0.3% |
| 61 | Nondepository institutions | 78 | 39 | -12.9% | 15,887 | 18,864 | 583,363 | 677,546 | 3.5% | 3.0% |
| 62 | Security & commodity brokers | 94 | 34 | -18.4% | 21,809 | 27,131 | 1,197,428 | 1,388,276 | 4.5% | 3.0% |
| 63 | Insurance carriers | 119 | 9 | -40.3% | 32,585 | 32,230 | 1,708,002 | 1,803,748 | -0.2% | 1.1% |
| 64 | Insurance agents, services | 92 | 30 | -20.1% | 27,078 | 27,688 | 1,247,387 | 1,309,960 | 0.4% | 1.0% |
| 65 | Real estate | 98 | 129 | 5.7% | 13,414 | 16,812 | 642,279 | 760,099 | 4.6% | 3.4% |
| 70 | Hotels and other lodging | 453 | 496 | 1.8% | 205 | 1,883 | 198,767 | 225,419 | 55.8% | 2.5% |
| 72 | Personal services | 266 | 198 | -5.7% | 4,565 | 3,714 | 281,701 | 283,797 | -4.0% | 0.1% |
| 73 | Business services | 186 | 18 | -37.3% | 27,278 | 25,424 | 1,175,221 | 1,318,419 | -1.4% | 2.3% |
| 75 | Auto repair, services, parking | 238 | 299 | 4.7% | 279,852 | 292,024 | 12,004,643 | 13,283,513 | 0.9% | 2.0% |
| 76 | Miscellaneous repair services | 103 | 45 | -15.3% | 19,681 | 21,599 | 1,049,313 | 1,182,581 | 1.9% | 2.4% |
| 78 | Motion pictures | 0 | 19 | -- | 55,740 | 65,665 | 2,323,744 | 2,776,615 | 3.3% | 3.6% |
| 79 | Amusements & recreation | 22 | 112 | 38.5% | 39,448 | 47,863 | 1,753,353 | 2,188,670 | 3.9% | 4.5% |
| 80 | Health services | 3,960 | 6,873 | 11.7% | 1,495 | 2,248 | 96,511 | 119,999 | 8.5% | 4.5% |
| 81 | Legal services | 164 | 131 | -4.4% | 58,218 | 65,816 | 2,487,606 | 2,752,558 | 2.5% | 2.0% |
| 82 | Educational services | 88 | 45 | -12.6% | 22,257 | 24,499 | 1,397,009 | 1,673,514 | 1.9% | 3.7% |
| 83 | Social services | 579 | 404 | -6.9% | 112,301 | 120,973 | 5,037,866 | 5,367,166 | 1.5% | 1.3% |
| 84 | Museums, botanical, zoos | 0 | 0 | -- | 802 | 2,894 | 77,642 | 46,352 | 29.3% | -9.8% |
| 86 | Membership organizations | 611 | 751 | 4.2% | 27,551 | 40,670 | 2,062,501 | 2,752,558 | 8.1% | 5.9% |
| 87 | Engineering & management | 42 | 71 | 11.1% | 27,343 | 19,719 | 2,589,839 | 1,673,514 | -6.3% | -8.4% |
| 89 | Services, other | 858 | 914 | 1.3% | 620 | 4,997 | 84,960 | 547,318 | 51.8% | 45.1% |
| 99 | Unclassified establishments | 13 | 92 | 47.9% | 991 | 556 | 64,441 | 46,352 | -10.9% | -6.4% |
| TOTAL | | 33,585 | 36,141 | 1.5% | 2,020,270 | 2,065,014 | 93,583,404 | 97,962,361 | 0.4% | 0.9% |

EDGE Spreadsheet - Input Form 2
Current Employment

Branson West Airport

| SIC | Industry | Study Area | | | Comparison Area | | United States | | Annual Growth | |
|--------------|---|---------------|---------------|---------------|------------------|------------------|-------------------|-------------------|---------------|-------------|
| | | 1998 | 2003 | Annual Growth | 1998 | 2003 | 1998 | 2003 | Comp. | U.S. |
| | | Stone Co. | | | Rest of Missouri | | United States | | | |
| 7 | Agricultural services | 19 | 10 | -12% | 1,512 | 1,656 | 187,133 | 180,673 | 1.8% | -0.7% |
| 10 | Metal mining | 100 | 9 | -38% | 60 | 60 | 97,039 | 83,447 | 0.0% | -3.0% |
| 12 | Coal mining | 60 | 9 | -32% | 3,216 | 3,750 | 100,128 | 90,875 | 3.1% | -1.9% |
| 13 | Oil and gas extraction | 0 | 0 | -- | 6,647 | 9,065 | 1,075,592 | 1,189,243 | 6.4% | 2.0% |
| 15 | General contractors | 126 | 167 | 6% | 73,840 | 85,522 | 3,560,214 | 3,978,770 | 3.0% | 2.2% |
| 16 | Heavy construction | 162 | 164 | 0% | 38,311 | 37,126 | 1,464,419 | 1,495,998 | -0.6% | 0.4% |
| 17 | Special trade contractors | 1,024 | 754 | -6% | 9 | 9 | 32,636 | 23,830 | 0.0% | -6.1% |
| 20 | Food and kindred products | 70 | 395 | 41% | 655 | 470 | 385,454 | 254,838 | -6.4% | -7.9% |
| 21 | Tobacco products | 9 | 9 | 0% | 12,250 | 4,484 | 671,184 | 303,654 | -18.2% | -14.7% |
| 22 | Textile mill products | 9 | 9 | 0% | 10,255 | 9,516 | 580,290 | 523,984 | -1.5% | -2.0% |
| 23 | Apparel & other textile products | 175 | 60 | -19% | 12,230 | 11,480 | 603,853 | 564,414 | -1.3% | -1.3% |
| 24 | Lumber and wood products | 15 | 18 | 4% | 13,048 | 10,593 | 567,891 | 482,232 | -4.1% | -3.2% |
| 25 | Furniture and fixtures | 16 | 18 | 2% | 22,019 | 18,474 | 845,053 | 700,221 | -3.4% | -3.7% |
| 26 | Paper and allied products | 0 | 0 | -- | 22,325 | 18,758 | 900,706 | 841,375 | -3.4% | -1.4% |
| 27 | Printing and publishing | 105 | 44 | -16% | 1,405 | 1,773 | 111,000 | 98,334 | 4.8% | -2.4% |
| 28 | Chemicals and allied products | 190 | 69 | -18% | 21,425 | 21,187 | 1,030,378 | 921,392 | -0.2% | -2.2% |
| 29 | Petroleum and coal products | 14 | 0 | -100% | 4,012 | 1,855 | 79,325 | 44,113 | -14.3% | -11.1% |
| 30 | Rubber and misc. plastics products | 0 | 9 | -- | 10,492 | 9,607 | 508,270 | 467,644 | -1.7% | -1.7% |
| 31 | Leather and leather products | 18 | 10 | -11% | 12,805 | 10,677 | 615,171 | 479,693 | -3.6% | -4.9% |
| 32 | Stone, Clay, and glass products | 172 | 218 | 5% | 40,378 | 31,318 | 1,816,198 | 1,518,266 | -5.0% | -3.5% |
| 33 | Primary metal industries | 30 | 9 | -21% | 34,336 | 34,603 | 1,444,438 | 1,129,140 | 0.2% | -4.8% |
| 34 | Fabricated metal products | 69 | 77 | 2% | 33,724 | 22,995 | 602,395 | 459,993 | -7.4% | -5.3% |
| 35 | Industrial machinery and equipment | 20 | 18 | -2% | 71,731 | 43,895 | 1,911,337 | 1,606,713 | -9.4% | -3.4% |
| 36 | Electronic and other electric equipment | 18 | 9 | -13% | 13,627 | 13,649 | 737,392 | 707,844 | 0.0% | -0.8% |
| 37 | Transportation equipment | 69 | 9 | -33% | 175 | 175 | 23,374 | 17,861 | 0.0% | -5.2% |
| 39 | Miscellaneous manufacturing industries | 65 | 93 | 7% | 863 | 452 | 72,754 | 67,329 | -12.1% | -1.5% |
| 41 | Local and interurban passenger transit | 11 | 9 | -4% | 14,478 | 12,807 | 560,023 | 533,799 | -2.4% | -1.0% |
| 42 | Trucking and warehousing | 183 | 265 | 8% | 347 | 366 | 49,406 | 41,003 | 1.1% | -3.7% |
| 44 | Water transportation | 0 | 0 | -- | 8,403 | 9,886 | 349,343 | 397,949 | 3.3% | 2.6% |
| 45 | Transportation by air | 9 | 0 | -100% | 77,262 | 79,926 | 3,141,957 | 3,599,902 | 0.7% | 2.8% |
| 46 | Pipelines, except natural gas | 1 | 9 | 55% | 5,154 | 5,078 | 1,166,260 | 1,227,575 | -0.3% | 1.0% |
| 47 | Transportation services | 58 | 218 | 30% | 71,150 | 62,161 | 3,466,550 | 3,312,720 | -2.7% | -0.9% |
| 48 | Communications | 560 | 460 | -4% | 55,535 | 58,047 | 2,418,396 | 2,287,616 | 0.9% | -1.1% |
| 49 | Electric, gas & sanitary services | 63 | 184 | 24% | 26,512 | 28,577 | 1,131,161 | 1,189,772 | 1.5% | 1.0% |
| 50 | Wholesale trade - durable goods | 216 | 225 | 1% | 64,099 | 64,491 | 2,479,150 | 2,525,180 | 0.1% | 0.4% |
| 51 | Wholesale trade - nondurables | 114 | 91 | -4% | 52,624 | 48,949 | 2,943,644 | 2,883,781 | -1.4% | -0.4% |
| 52 | Bldg materials & garden supplies | 244 | 392 | 10% | 65,674 | 70,069 | 2,703,601 | 2,857,650 | 1.3% | 1.1% |
| 53 | General merchandise | 816 | 853 | 1% | 22,136 | 24,142 | 1,280,356 | 1,467,427 | 1.8% | 2.8% |
| 54 | Foods stores | 551 | 772 | 7% | 9,543 | 10,963 | 509,669 | 560,717 | 2.8% | 1.9% |
| 55 | Auto dealers & service stations | 623 | 687 | 2% | 170,288 | 189,724 | 7,758,086 | 8,635,903 | 2.2% | 2.2% |
| 56 | Apparel and accessory stores | 759 | 837 | 2% | 16,692 | 17,791 | 795,891 | 819,281 | 1.3% | 0.6% |
| 57 | Furniture and home stores | 191 | 346 | 13% | 44,526 | 45,295 | 1,920,433 | 2,081,714 | 0.3% | 1.6% |
| 58 | Eating and drinking estabs | 2,805 | 2,837 | 0% | 10,280 | 11,229 | 565,514 | 719,435 | 1.8% | 4.9% |
| 59 | Miscellaneous retail | 516 | 356 | -7% | 15,346 | 18,802 | 724,207 | 901,641 | 4.1% | 4.5% |
| 60 | Depository institutions | 496 | 550 | 2% | 46,304 | 48,300 | 1,532,557 | 1,509,446 | 0.8% | -0.3% |
| 61 | Nondepository institutions | 19 | 69 | 29% | 15,873 | 18,864 | 583,363 | 677,546 | 3.5% | 3.0% |
| 62 | Security & commodity brokers | 69 | 18 | -24% | 21,793 | 27,064 | 1,197,428 | 1,388,276 | 4.4% | 3.0% |
| 63 | Insurance carriers | 18 | 49 | 22% | 32,543 | 32,129 | 1,708,002 | 1,803,748 | -0.3% | 1.1% |
| 64 | Insurance agents, services | 133 | 110 | -4% | 27,102 | 27,723 | 1,247,387 | 1,309,960 | 0.5% | 1.0% |
| 65 | Real estate | 1,140 | 1,489 | 5% | 13,399 | 16,812 | 642,279 | 760,099 | 4.6% | 3.4% |
| 70 | Hotels and other lodging | 2,287 | 2,498 | 2% | 206 | 1,894 | 198,767 | 225,419 | 55.8% | 2.5% |
| 72 | Personal services | 188 | 148 | -5% | 4,565 | 3,714 | 281,701 | 283,797 | -4.0% | 0.1% |
| 73 | Business services | 35 | 59 | 11% | 26,537 | 23,972 | 1,175,221 | 1,318,419 | -2.0% | 2.3% |
| 75 | Auto repair, services, parking | 200 | 231 | 3% | 280,520 | 292,632 | 12,004,643 | 13,283,513 | 0.8% | 2.0% |
| 76 | Miscellaneous repair services | 20 | 9 | -15% | 19,717 | 21,609 | 1,049,313 | 1,182,581 | 1.8% | 2.4% |
| 78 | Motion pictures | 163 | 180 | 2% | 55,740 | 65,672 | 2,323,744 | 2,776,615 | 3.3% | 3.6% |
| 79 | Amusements & recreation | 1,125 | 1,789 | 10% | 39,538 | 47,965 | 1,753,353 | 2,188,670 | 3.9% | 4.5% |
| 80 | Health services | 1,584 | 1,869 | 3% | 1,490 | 2,243 | 96,511 | 119,999 | 8.5% | 4.5% |
| 81 | Legal services | 77 | 74 | -1% | 58,172 | 65,798 | 2,487,606 | 2,752,558 | 2.5% | 2.0% |
| 82 | Educational services | 394 | 378 | -1% | 22,256 | 24,529 | 1,397,009 | 1,673,514 | 2.0% | 3.7% |
| 83 | Social services | 147 | 248 | 11% | 112,320 | 120,995 | 5,037,866 | 5,367,166 | 1.5% | 1.3% |
| 84 | Museums, botanical, zoos | 65 | 48 | -6% | 787 | 2,926 | 77,642 | 46,352 | 30.0% | -9.8% |
| 86 | Membership organizations | 677 | 1,016 | 8% | 27,551 | 40,670 | 2,062,501 | 2,752,558 | 8.1% | 5.9% |
| 87 | Engineering & management | 28 | 19 | -7% | 27,343 | 19,719 | 2,589,839 | 1,673,514 | -6.3% | -8.4% |
| 89 | Services, other | 774 | 1,065 | 7% | 620 | 4,997 | 84,960 | 547,318 | 51.8% | 45.1% |
| 99 | Unclassified establishments | 21 | 12 | -11% | 991 | 556 | 64,441 | 46,352 | -10.9% | -6.4% |
| TOTAL | | 19,935 | 22,656 | 3% | 2,026,766 | 2,072,235 | 93,583,404 | 97,962,361 | 0.9% | 0.9% |

Appendix B:
Potential Airport User Firm Employment

Branson West Community Airport

| Company Name | Primary City | SIC (2-digit) | SIC Arprt | Primary_Sic_Desc | Location Empl | Location Sales (\$000) |
|--------------------------------|-----------------|---------------|-----------|--|---------------|------------------------|
| Showboat Branson Belle | Branson | 44.0 | 1 | Boats-Excursions | 20 | \$2,120 |
| Fall Creek Resort | Branson | 44.0 | 1 | Marinas (Resort) | 100 | \$10,700 |
| FAIRFIELD Communities | Branson | 65.0 | 1 | Vacation Rentals | 500 | \$67,000 |
| Kimberling Inn | Kimberling City | 70.0 | 1 | Hotels (Resort) | 350 | \$34,300 |
| Big Cedar Lodge | Ridgedale | 70.0 | 1 | Resorts | 350 | \$37,450 |
| Cooper Shares Check-in | Reeds Spring | 70.0 | 1 | Resorts | 25 | \$2,675 |
| Escapes to Stonebridge Village | Reeds Spring | 70.0 | 1 | Resorts | 20 | \$2,140 |
| Falls Village | Branson | 70.0 | 1 | Resorts | 100 | \$10,700 |
| French Quarter | Branson | 70.0 | 1 | Resorts | 35 | \$3,745 |
| Ozark Mountain Resort | Kimberling City | 70.0 | 1 | Resorts | 50 | \$5,350 |
| Paradise Point Resort | Hollister | 70.0 | 1 | Resorts | 20 | \$2,140 |
| Plantation at Fall Creek | Branson | 70.0 | 1 | Resorts | 200 | \$21,400 |
| Roark Interval Sales | Branson | 70.0 | 1 | Resorts | 50 | \$5,350 |
| Southern Oaks Inn | Branson | 70.0 | 1 | Resorts | 35 | \$3,745 |
| Surrey Vacation Resort | Branson | 70.0 | 1 | Resorts | 30 | \$3,210 |
| Trendwest Resorts | Branson | 70.0 | 1 | Resorts | 30 | \$3,210 |
| Welk Resort Hotel Branson | Branson | 70.0 | 1 | Resorts | 230 | \$24,610 |
| Westgate Branson Woods | Branson | 70.0 | 1 | Resorts | 250 | \$26,750 |
| Westgate Resorts | Branson | 70.0 | 1 | Resorts | 100 | \$10,700 |
| Worldmark at Branson | Branson | 70.0 | 1 | Resorts | 20 | \$2,140 |
| 50's at the Hop Show | Branson | 79.0 | 1 | Theatres-Live | 75 | \$10,575 |
| Andy Williams Moon River Thtr | Branson | 79.0 | 1 | Theatres-Live | 90 | \$12,690 |
| Bobby Vinton Theatre | Branson | 79.0 | 1 | Theatres-Live | 100 | \$14,100 |
| Country Tonite Theatre | Branson | 79.0 | 1 | Theatres-Live | 45 | \$6,345 |
| Doug Gabriel Show | Branson | 79.0 | 1 | Theatres-Live | 50 | \$7,050 |
| Jim Stafford Theatre | Branson | 79.0 | 1 | Theatres-Live | 75 | \$10,575 |
| Legends in Concert | Branson | 79.0 | 1 | Theatres-Live | 50 | \$7,050 |
| MGH Performing Arts Ctr | Branson | 79.0 | 1 | Theatres-Live | 65 | \$9,165 |
| Moe Bandy Show | Branson | 79.0 | 1 | Theatres-Live | 25 | \$3,525 |
| Moe Bandy Theater | Branson | 79.0 | 1 | Theatres-Live | 35 | \$4,935 |
| Shepherd of the Hills | Branson | 79.0 | 1 | Theatres-Live | 200 | \$28,200 |
| Starlite Theatre | Branson | 79.0 | 1 | Theatres-Live | 80 | \$11,280 |
| Tri-Lakes Community Theatre | Branson | 79.0 | 1 | Theatres-Live | 20 | \$2,820 |
| Branson Mall Music Theatre | Branson | 79.0 | 1 | Musical Productions | 20 | \$2,820 |
| Grand Palace | Branson | 79.0 | 1 | Music Shows | 300 | \$66,000 |
| Mickey Gilley Theatre | Branson | 79.0 | 1 | Music Shows | 20 | \$4,400 |
| Pierce Arrow Theater | Branson | 79.0 | 1 | Music Shows | 24 | \$5,280 |
| Presleys' Country Jubilee | Branson | 79.0 | 1 | Music Shows | 40 | \$8,800 |
| Hughes Brothers Celebrity Thtr | Branson | 79.0 | 1 | Entertainers-Children & Family | 50 | \$12,500 |
| Grand Palace Theatre | Branson | 79.0 | 1 | Entertainers | 100 | \$25,000 |
| Snadon Enterprises | Branson | 79.0 | 1 | Entertainers | 35 | \$8,750 |
| Branson Creek Golf Club | Hollister | 79.0 | 1 | Golf Courses-Public | 20 | \$1,680 |
| Ledgestone Golf Course | Reeds Spring | 79.0 | 1 | Golf Courses-Public | 25 | \$2,100 |
| Thousand Hills Golf | Branson | 79.0 | 1 | Golf Courses-Public | 51 | \$4,284 |
| Kids Kountry | Branson | 79.0 | 1 | Amusement Places | 35 | \$2,940 |
| White Water | Branson | 79.0 | 1 | Water Parks | 200 | \$16,800 |
| Dogwood Canyon Nature Park | Lampe | 79.0 | 1 | Parks | 50 | \$4,350 |
| Branson Scenic Railway | Branson | 79.0 | 1 | Tourist Attractions | 22 | \$1,914 |
| Ride the Ducks | Branson | 79.0 | 1 | Tourist Attractions | 50 | \$4,350 |
| Festiva Resort | Branson | 79.0 | 1 | Ticket Service (Resort) | 365 | \$30,660 |
| Roy Rogers & Dale Evans Museum | Branson | 84.0 | 1 | Museums | 20 | \$0 |
| Titanic-Branson | Branson | 84.0 | 1 | Museums | 20 | \$0 |
| Cox Communications | Branson | 48.0 | 2 | Television-Cable & CATV | 50 | \$1,800 |
| First Community Bank of Ozard | Branson | 60.0 | 2 | Banks | 32 | \$9,632 |
| Stone County National Bank | Crane | 60.0 | 2 | Banks | 17 | \$0 |
| Fairfield Branson | Branson | 65.0 | 2 | Real Estate Developers | 220 | \$98,780 |
| Midwest Partitions | Branson | 65.0 | 2 | Real Estate Developers | 200 | \$89,800 |
| Palmerton & Parrish Inc | Hollister | 87.0 | 2 | Laboratories-Testing | 30 | \$4,290 |
| Stone Hill Winery | Branson | 20.0 | 3 | Wineries | 30 | \$16,050 |
| Stone County Garment Co | Crane | 23.0 | 3 | Men's Clothing-Manufacturers | 25 | \$3,875 |
| Branson Daily News | Branson | 27.0 | 3 | Newspapers (Publishers) | 70 | \$12,180 |
| Bottoms Up Boat Lift Systems | Lampe | 35.0 | 3 | Boat Lifts (Manufacturers) | 50 | \$14,000 |
| Applied Digital | Branson West | 38.0 | 3 | Controls Control Systems/Regulators-Mfrs | 36 | \$9,792 |
| Hollister Medical Ctr | Hollister | 80.0 | 4 | Hospitals | 150 | \$15,900 |
| Skaggs Community Health Ctr | Branson | 80.0 | 4 | Hospitals | 549 | \$58,194 |

Total Employment and Sales 6,331 \$944,666

Eldon Model Airpark

| Company_Name | Primary_City | SIC | | Primary SIC Desc | Location | Location |
|-----------------------------------|----------------|-----------|----------|-----------------------------------|--------------|------------------|
| | | (2-digit) | SIC Arpt | | Emply | Sales (\$000) |
| Camp Heritage | Climax Springs | 70.0 | 1 | Camps | 38 | \$4,826 |
| Lake of the Ozarks State Park | Kaiser | 79.0 | 1 | Parks | 20 | \$1,740 |
| Miner Mike's & Busters | Osage Beach | 79.0 | 1 | Amusement Places | 45 | \$3,780 |
| Timber Falls Indoor Waterpark | Osage Beach | 79.0 | 1 | Amusement Places | 600 | \$50,400 |
| Knolls Resort Condominiums | Osage Beach | 65.0 | 1 | Condominiums | 26 | \$5,148 |
| Lakewood Resort Corp | Osage Beach | 65.0 | 1 | Condominiums | 60 | \$11,880 |
| Ozark Opry | Osage Beach | 79.0 | 1 | Entertainers | 25 | \$6,250 |
| Oaks at Tan-Tar-A Resort | Osage Beach | 79.0 | 1 | Golf Courses-Public | 20 | \$1,680 |
| Sycamore Creek Golf Club | Osage Beach | 79.0 | 1 | Golf Courses-Public | 40 | \$3,360 |
| Howard Johnson | Osage Beach | 70.0 | 1 | Hotels & Motels | 20 | \$1,960 |
| Tan-Tar-A Resorts | Osage Beach | 70.0 | 1 | Hotels & Motels | 550 | \$53,900 |
| Inn at Grand Glaize | Osage Beach | 70.0 | 1 | Resorts | 70 | \$7,490 |
| Kirkwood Lodge | Osage Beach | 70.0 | 1 | Resorts | 25 | \$2,675 |
| Main Street Music Hall | Osage Beach | 79.0 | 1 | Theatres-Live | 20 | \$2,820 |
| Citizens Bancshares of Eldon | Eldon | 67.0 | 2 | Holding Companies (Bank) | 30 | \$0 |
| Mid-Mo Turkey Svc | Gravois Mills | 89.0 | 2 | Services NEC | 27 | \$4,806 |
| Central Bank of the Ozarks | Osage Beach | 60.0 | 2 | Banks | 100 | \$0 |
| Lake of the Ozarks Pubh Co | Osage Beach | 87.0 | 2 | Publishing Consultants | 27 | \$4,590 |
| Arkansas Valley Feathers Inc | California | 39.0 | 3 | Manufacturers | 71 | \$13,774 |
| California Manufacturing Co | California | 23.0 | 3 | Men's Clothing-Manufacturers | 80 | \$12,400 |
| Aerosonics Inc | California | 34.0 | 3 | Metal Goods-Manufacturers | 30 | \$0 |
| Fasco Motors Group | Eldon | 36.0 | 3 | Electric Motors-Manufacturers | 800 | \$204,000 |
| Carousel International Corp | Eldon | 35.0 | 3 | Indstrial/Coml Machinery/Equip NE | 75 | \$18,375 |
| Gateway Industries Work Shop | Eldon | 38.0 | 3 | Physicians & Surgeons Equip & | 42 | \$13,524 |
| Custom Sign LLC | Eldon | 39.0 | 3 | Signs (Manufacturers) | 20 | \$3,460 |
| L B Mfg Co | Iberia | 23.0 | 3 | Waterproof Outerwear (Manufac | 86 | \$10,148 |
| Stanton Manufacturing Co | Lake Ozark | 24.0 | 3 | Wood Products NEC (Manufactu | 40 | \$6,760 |
| Boat Lift Marine Ctr | Osage Beach | 35.0 | 3 | Boat Lifts (Manufacturers) | 20 | \$5,600 |
| Gates Rubber Co | Versailles | 34.0 | 3 | Hose Couplings & Fittings-Manu | 300 | \$73,200 |
| Lake Ozark General Hospital | Eldon | 80.0 | 4 | Hospitals | 150 | \$15,900 |
| Eldon Career Ctr | Eldon | 82.0 | 4 | Junior Colleges & Technical Insti | 20 | \$0 |
| Lake Regional Health System | Osage Beach | 80.0 | 4 | Physical Therapists | 900 | \$73,800 |
| Total Employment and Sales | | | | | 4,377 | \$618,246 |

Monett Municipal Airport

| Company_Name | Primary_City | SIC (2-digit) | Primary_Sic_Desc | Location Empl | Location Sales (\$000) |
|-----------------------------------|--------------|------------------|--|------------------|---------------------------|
| Efco Corp | Monett | 33.0 | Aluminum Extruded Products (Mfrs) | 1,350 | \$93,300 |
| Fasco Motors Group | Cassville | 36.0 | Electric Motors-Manufacturers | 812 | \$207,060 |
| Jack Henry & Assoc Inc | Monett | 73.0 | Computers-System Designers & Consultants | 1,049 | \$52,000 |
| Justin Boot Co | Cassville | 31.0 | Boots-Manufacturers | 217 | \$45,136 |
| Mid-America Hardwoods Inc | Sarcoixie | 24.0 | Wood Products NEC (Manufacturers) | 250 | \$20,300 |
| Miracle Recreation Equipment | Monett | 39.0 | Sporting & Athletic Goods NEC (Mfrs) | 500 | \$145,000 |
| Schreiber Foods | Mt Vernon | 20.0 | Food Products & Manufacturers | 185 | \$74,925 |
| Tyson Foods Inc | Monett | 20.0 | Poultry Processing Plants | 900 | \$212,400 |
| Able 2 Products | Cassville | 38.0 | Physicians & Surgeons Equip & Supls-Mfrs | 125 | \$40,250 |
| American Dehydrated Foods Inc | Verona | 20.0 | Dog & Cat Food (Manufacturers) | 31 | \$34,782 |
| Aurora Community Hospital | Aurora | 80.0 | Hospitals | 200 | \$21,200 |
| Bass Equipment Co | Monett | 34.0 | Fabricated Wire Products-Misc (Mfrs) | 20 | \$4,300 |
| BCP Ingredients | Verona | 20.0 | Food Preparations NEC (Manufacturers) | 67 | \$27,135 |
| Bioproducts Inc | Aurora | 20.0 | Dog & Cat Food (Manufacturers) | 40 | \$44,880 |
| Clark Industries Inc | Monett | 35.0 | Machine Shops | 25 | \$4,175 |
| Classic Egg Products | Neosho | 20.0 | Food Preparations NEC (Manufacturers) | 53 | \$21,465 |
| Continental Manufacturing Co | Mt Vernon | 35.0 | Conveyors & Conveying Equipment-Mfrs | 55 | \$14,410 |
| Cox-Monett Hospital | Monett | 80.0 | Hospitals | 250 | \$26,500 |
| Crowder College | Cassville | 82.0 | Schools-Universities & Colleges Academic | 30 | \$0 |
| Crowder College | Neosho | 82.0 | Schools-Universities & Colleges Academic | 40 | \$0 |
| Crowder College LRC | Neosho | 82.0 | Libraries-Institutional | 200 | \$0 |
| Crowder Industries Inc | Neosho | 26.0 | Corrugated & Solid Fiber Boxes (Mfrs) | 170 | \$65,110 |
| Cutting Edge Inc | Mt Vernon | 35.0 | Machine Shops | 20 | \$3,340 |
| Dave's Custom Woodworking | Aurora | 24.0 | Cabinets-Manufacturers | 25 | \$4,250 |
| Evans Collars | Mt Vernon | 39.0 | Manufacturers | 31 | \$6,014 |
| Freeman Neosho Hospital | Neosho | 80.0 | Hospitals | 267 | \$28,302 |
| Holden Industries Inc | Neosho | 37.0 | Truck-Trailer (Manufacturers) | 20 | \$5,140 |
| Howard Johnson's of Mo | Neosho | 28.0 | Phosphatic Fertilizers (Manufacturers) | 23 | \$21,436 |
| Hydro Aluminum North America | Cassville | 34.0 | Metal Doors Sash Frames & Trim (Mfrs) | 40 | \$7,480 |
| International Institute-Lrnng | Monett | 87.0 | Training Consultants | 25 | \$5,625 |
| Iron Mule Products Inc | Cassville | 34.0 | Valves & Pipe Fittings NEC (Mfrs) | 32 | \$7,808 |
| K & S Wire Products Inc | Neosho | 34.0 | Fabricated Wire Products-Misc (Mfrs) | 75 | \$16,125 |
| Koplin Outdoors Inc | Neosho | 39.0 | Sporting & Athletic Goods NEC (Mfrs) | 101 | \$29,290 |
| Latco Inc | Cassville | 35.0 | Poultry Equipment & Supplies-Mfrs | 20 | \$8,300 |
| Level Ride Mfg Co | Diamond | 39.0 | Manufacturers | 20 | \$3,880 |
| Luck E Strike USA | Cassville | 39.0 | Fishing Tackle Mfrs-Supls (Mfrs) | 60 | \$17,400 |
| MFA Milling Co | Aurora | 20.0 | Feed-Manufacturers | 21 | \$17,031 |
| Mid-America Precision Products | Stella | 34.0 | Sheet Metal Fabricators | 20 | \$4,100 |
| Midway Machining Co Inc | Neosho | 35.0 | Machine Shops | 26 | \$1,512 |
| Missouri Rehabilitation Ctr | Mt Vernon | 80.0 | Hospitals | 430 | \$45,580 |
| Monett Times | Monett | 27.0 | Newspapers (Publishers) | 20 | \$3,480 |
| MWM Dexter Inc | Aurora | 27.0 | Printers | 130 | \$26,910 |
| Neosho Box & Wood Products | Neosho | 24.0 | Pallets & Skids-Manufacturers | 30 | \$4,560 |
| Neosho Concrete Products Co | Neosho | 32.0 | Concrete-Block & Brick (Manufacturers) | 25 | \$7,675 |
| Neosho Daily News | Neosho | 27.0 | Newspapers (Publishers) | 50 | \$8,700 |
| Ozark Bible Institute | Neosho | 82.0 | Schools-Universities & Colleges Academic | 35 | \$0 |
| Ozark Mountain Apparel | Monett | 23.0 | Coats-Manufacturers | 35 | \$5,355 |
| Ozark Plastics Products | Neosho | 30.0 | Plastics-Mold-Manufacturers | 20 | \$4,540 |
| R & M Industries | Purdy | 35.0 | Machine Shops | 40 | \$6,680 |
| Roderick Arms | Monett | 37.0 | Aircraft Components-Manufacturers | 33 | \$2,100 |
| Shaffer Sportswear Mfg Inc | Neosho | 23.0 | Sportswear-Mens-Manufacturers | 65 | \$7,670 |
| Silgan Containers Corp | Mt Vernon | 34.0 | Can-Manufacturers | 80 | \$67,920 |
| St John County Hospital | Cassville | 80.0 | Hospitals | 150 | \$15,900 |
| T & C Stainless | Mt Vernon | 34.0 | Steel-Structural (Manufacturers) | 36 | \$9,936 |
| Talbot Industries Inc | Neosho | 34.0 | Fabricated Wire Products-Misc (Mfrs) | 300 | \$0 |
| Thorco Industries | Cassville | 34.0 | Fabricated Wire Products-Misc (Mfrs) | 108 | \$23,220 |
| Tyson Foods Inc | Aurora | 20.0 | Poultry Processing Plants | 25 | \$5,900 |
| US Veterans Outpatient Clinic | Mt Vernon | 80.0 | Hospitals | 150 | \$15,900 |
| Wells Aluminum Corp | Monett | 33.0 | Aluminum Extruded Products (Mfrs) | 300 | \$94,800 |
| Total Employment and Sales | | | | 9,457 | \$1,698,187 |

Creve Couer Airport

| Company Name | Primary_City | SIC | | Location | Location |
|-------------------------------|------------------|-----------|--|----------|---------------|
| | | (2-digit) | Primary_Sic_Desc | Empl | Sales (\$000) |
| Ameristar Casino St Charles | St Charles | 79.0 | Casinos | 1,200 | \$0 |
| Statewide Lending | St Peters | 61.0 | Real Estate Loans | 612 | \$121,788 |
| Northwest Title & Escrow Corp | Creve Coeur | 65.0 | Title Companies | 500 | \$88,000 |
| Quilogy | St Charles | 73.0 | Computers-System Designers & Consultants | 400 | \$62,800 |
| Correctional Medical Svc Inc | Creve Coeur | 87.0 | Hospital Consultants | 400 | \$0 |
| Cass Information Systems Inc | Bridgeton | 73.0 | Data Processing Service | 300 | \$0 |
| World Omni Financial Corp | Earth City | 62.0 | Financial Advisory Services | 278 | \$89,516 |
| Epsilon | Earth City | 73.0 | Mailing & Shipping Services | 220 | \$46,200 |
| Fireman's Fund | Earth City | 64.0 | Insurance | 210 | \$41,160 |
| Advanced Business Fullfilment | Earth City | 73.0 | Advertising-Direct Mail | 200 | \$42,000 |
| Kuhlmann Design Group Inc | Maryland Heights | 87.0 | Architects | 100 | \$20,700 |
| MEMC Electronic Materials Inc | St Peters | 36.0 | Semiconductor Devices (Manufacturers) | 1,800 | \$0 |
| Hussmann Corp | Bridgeton | 35.0 | Refrigeration Equipment-Truck (Mfrs) | 1,700 | \$0 |
| Crane Merchandising Systems | Bridgeton | 35.0 | Vending Machines-Manufacturers | 600 | \$0 |
| Contico | Bridgeton | 30.0 | Plastics & Plastic Products (Mfrs) | 400 | \$0 |
| Emerson Climate Technologies | Maryland Heights | 34.0 | Valves & Pipe Fittings NEC (Mfrs) | 400 | \$0 |
| Leonard's Metal Inc | St Charles | 37.0 | Aircraft Components-Manufacturers | 400 | \$0 |
| LMI Aerospace Inc | St Charles | 37.0 | Aircraft Components-Manufacturers | 400 | \$0 |
| Jarrell Contracting & Svc Co | Earth City | 34.0 | Sheet Metal Fabricators | 350 | \$71,750 |
| Hydromat Inc | Maryland Heights | 35.0 | Metalworking Machinery NEC (Mfrs) | 300 | \$44,600 |
| Harvard Industries Inc | Bridgeton | 33.0 | Aluminum Die Castings (Manufacturers) | 225 | \$58,050 |
| Central Mine Equipment Co | Earth City | 35.0 | Drilling & Boring Equip & Supls-Mfrs | 225 | \$84,375 |
| Jerome Group | Maryland Heights | 27.0 | Printers | 200 | \$41,400 |
| CAPS Inc | Bridgeton | 30.0 | Plastics-Mold-Manufacturers | 200 | \$45,400 |
| Johnson Marcraft Inc | Maryland Heights | 35.0 | Air Conditioning/Htg/Refrig Equip (Mfrs) | 200 | \$69,600 |
| American Railcar Industries | St Charles | 37.0 | Railroad Cars-Manufacturers | 200 | \$0 |
| Craftsmen Industries Inc | St Charles | 39.0 | Marking Devices (Manufacturers) | 200 | \$35,400 |
| C & R Mechanical Co | Bridgeton | 34.0 | Sheet Metal Fabricators | 180 | \$36,900 |
| Wainwright Industries Inc | St Peters | 34.0 | Metal Stamping (Manufacturers) | 180 | \$17,900 |
| Mitek Industries Inc | Earth City | 35.0 | Metal Forming Machinery (Manufacturers) | 150 | \$35,100 |
| Woodbridge Group | St Peters | 30.0 | Plastics-Foam (Manufacturers) | 135 | \$41,040 |
| Young Innovations Inc | Earth City | 38.0 | Dental Equipment-Manufacturers | 135 | \$0 |
| General Credit Forms | Earth City | 27.0 | Printers-Business Forms | 130 | \$22,440 |
| St Louis Post Dispatch | Maryland Heights | 27.0 | Newspapers (Publishers) | 125 | \$21,750 |
| Harland Printed Products | St Peters | 27.0 | Printers | 125 | \$25,875 |
| Didion & Sons Foundry Co | St Peters | 33.0 | Foundries-Steel | 120 | \$27,480 |
| National Cart Co | St Charles | 34.0 | Shopping Carts, Baskets, & Bags-Mfrs | 120 | \$25,800 |
| Whitney Design Inc | Bridgeton | 23.0 | House Furnishings-Ex Draperies (Mfrs) | 100 | \$17,700 |
| Spectrum Brands Inc | Bridgeton | 28.0 | Fertilizers-Manufacturers | 100 | \$107,800 |
| Laird Technologies | Earth City | 35.0 | Computer Supplies & Parts-Manufacturers | 100 | \$40,600 |
| De Paul Health Ctr | Bridgeton | 80.0 | Hospitals | 2,200 | \$233,200 |
| St Joseph Health Ctr | St Charles | 80.0 | Hospitals | 1,470 | \$155,820 |
| Barnes-Jewish St Peters Hosp | St Peters | 80.0 | Hospitals | 800 | \$84,800 |
| Missouri Baptist University | Creve Coeur | 82.0 | Schools-Universities & Colleges Academic | 320 | \$0 |
| St Charles Community College | St Peters | 82.0 | Schools-Universities & Colleges Academic | 300 | \$0 |
| Amdocs Ltd | Chesterfield | 73.0 | Computer Services | 470 | \$0 |
| US Bank | Olivette | 60.0 | Banks | 300 | \$0 |
| SAVVIS Inc | Chesterfield | 73.0 | Internet Service | 200 | \$0 |
| Protective Life Insurance Co | Chesterfield | 64.0 | Insurance | 100 | \$19,600 |
| Premium Retail Svc | Chesterfield | 87.0 | Marketing Consultants | 100 | \$23,000 |
| Paychex Inc | Chesterfield | 87.0 | Payroll Preparation Service | 100 | \$6,400 |
| Bio Merieux Inc | Hazelwood | 38.0 | Physicians & Surgeons Equip & Supls-Mfrs | 500 | \$161,000 |
| Printpack Inc | Hazelwood | 30.0 | Plastics & Plastic Products (Mfrs) | 300 | \$68,100 |
| Hilex Poly Co | Overland | 26.0 | Bags-Plastic (Manufacturers) | 200 | \$64,400 |
| Pentecostal Publishing House | Hazelwood | 27.0 | Periodicals-Publishing & Printing | 200 | \$12,288 |
| Ahal Contracting Co Inc | Hazelwood | 32.0 | Concrete Prods-Ex Block & Brick (Mfrs) | 200 | \$40,600 |
| Bodine Aluminum Inc | Overland | 33.0 | Foundries-Aluminum Brass Bronze & Etc | 200 | \$41,400 |
| Crane Merchandising Systems | Hazelwood | 35.0 | Vending Machines-Manufacturers | 200 | \$58,200 |
| True Fitness | O Fallon | 38.0 | Physicians & Surgeons Equip & Supls-Mfrs | 200 | \$50,000 |
| Reliv Intl Inc | Chesterfield | 28.0 | Vitamin Products-Manufacturers | 180 | \$0 |
| Dr Pepper/Seven-Up Bottling | Overland | 20.0 | Flavoring Extracts & Syrups NEC (Mfrs) | 165 | \$89,100 |

| Company_Name | Primary_City | SIC (2-digit) | Primary_Sic_Desc | Location Emply | Location Sales (\$000) |
|-----------------------------------|--------------|------------------|--|-------------------|---------------------------|
| Vsm Abrasive Corp | O Fallon | 32.0 | Abrasive Products (Manufacturers) | 160 | \$10,000 |
| Mail Well Envelope Co | O Fallon | 26.0 | Envelopes-Manufacturers | 150 | \$37,500 |
| Insituform Technologies Inc | Chesterfield | 34.0 | Pipe Lining & Coating (Manufacturers) | 150 | \$0 |
| Systems Enhancement Corp | O Fallon | 36.0 | Power Protection Systems (Manufacturers) | 150 | \$48,750 |
| Nordyne Inc | O Fallon | 32.0 | Glass-Manufacturers | 130 | \$0 |
| Smurfit-Stone Container Corp | Chesterfield | 26.0 | Boxes-Folding-Manufacturers | 125 | \$40,000 |
| Suburban Journals | Chesterfield | 27.0 | Newspapers (Publishers) | 120 | \$0 |
| John Steuvy Co | Hazelwood | 34.0 | Screw Machine Products (Manufacturers) | 120 | \$20,880 |
| Ofallon Casting | O Fallon | 33.0 | Investment Castings (Manufacturers) | 115 | \$22,655 |
| Givaudan Roure Flavors Inc | Hazelwood | 20.0 | Flavoring Extracts & Syrups NEC (Mfrs) | 100 | \$38,065 |
| Data Manufacturing | Chesterfield | 27.0 | Printers | 100 | \$20,700 |
| Graphic World Inc | Hazelwood | 27.0 | Typesetting (Manufacturers) | 100 | \$17,500 |
| Maverick Tube Corp | Chesterfield | 33.0 | Steel Pipe & Tubes (Manufacturers) | 100 | \$0 |
| Centurion Investments | O Fallon | 35.0 | Engines-Diesel-Manufacturers | 100 | \$58,800 |
| Findlay Industries | Chesterfield | 37.0 | Automobile Parts & Supplies-Mfrs | 100 | \$37,400 |
| Braking Technologies Inc | O Fallon | 39.0 | Manufacturers | 100 | \$19,400 |
| St Luke's Hospital | Chesterfield | 80.0 | Hospitals | 2,500 | \$1,386 |
| Logan College-Chiropractic Adm | Chesterfield | 82.0 | Schools-Universities & Colleges Academic | 250 | \$11,761 |
| After Hours Pediatric Urgent | Chesterfield | 80.0 | Hospitals | 150 | \$15,900 |
| St John's Mercy Urgent Care | O Fallon | 80.0 | Hospitals | 150 | \$15,900 |
| Flight Safety Intl | Hazelwood | 82.0 | Aircraft Schools | 140 | \$12,320 |
| Total Employment and Sales | | | | 27,735 | 2,919,949 |

Lees Summit Municipal Airport

| Company_Name | Primary_City | SIC (2-digit) | Primary SIC Description | Location Empl | Location Sales (\$000) |
|------------------------------|--------------|------------------|--|------------------|---------------------------|
| Con Agra Foods | Kansas City | 20.0 | Meat Packers | 335 | \$185,255 |
| Roberts Dairy | Kansas City | 20.0 | Fluid Milk (Manufacturers) | 300 | \$199,200 |
| General Mills Inc | Kansas City | 20.0 | Flour Mills | 200 | \$180,600 |
| Bartlett & Co | Kansas City | 20.0 | Flour Mills | 110 | \$0 |
| Folger Coffee Co | Kansas City | 20.0 | Coffee Mills | 200 | \$148,800 |
| Whitman's Candy Co Inc | Kansas City | 20.0 | Candy & Confectionery-Manufacturers | 225 | \$91,125 |
| Interstate Bakeries Corp | Kansas City | 20.0 | Bread/Other Bakery Prod-Ex Cookies (Mfr) | 500 | \$0 |
| Fabri-Quilt Inc | Kansas City | 22.0 | Textile Goods NEC (Manufacturers) | 150 | \$35,200 |
| Quality Wood Products Inc | Kansas City | 24.0 | Cabinets-Manufacturers | 270 | \$16,000 |
| Shamrock Cabinet & Fixture | Raytown | 24.0 | Cabinets-Manufacturers | 200 | \$8,200 |
| British Traditions | Grandview | 25.0 | Wood-Household Furn-Ex Upholstered (Mfr) | 100 | \$17,100 |
| Barton Nelson Inc | Kansas City | 26.0 | Stationery-Tablets/Related Prods (Mfrs) | 300 | \$21,500 |
| Tension Envelope Corp | Kansas City | 26.0 | Envelopes-Manufacturers | 600 | \$0 |
| Georgia-Pacific Corp | Kansas City | 26.0 | Corrugated & Solid Fiber Boxes (Mfrs) | 130 | \$49,790 |
| Western Container Co | Kansas City | 26.0 | Boxes-Folding-Manufacturers | 150 | \$48,000 |
| Smurfit-Stone Container | Kansas City | 26.0 | Boxes-Folding-Manufacturers | 150 | \$48,000 |
| Gateway Packaging Co of Mo | Kansas City | 26.0 | Bags-Paper (Manufacturers) | 200 | \$51,800 |
| Bennett Packaging | Lees Summit | 26.0 | Corrugated & Solid Fiber Boxes (Mfrs) | 125 | \$47,875 |
| Examiner | Independence | 27.0 | Newspapers (Publishers) | 100 | \$0 |
| K C Exposures | Kansas City | 27.0 | Publishers-Magazine | 162 | \$64,962 |
| Andrews Mc Meel Publishing | Kansas City | 27.0 | Publishers-Book | 130 | \$56,940 |
| Output Technologies | Kansas City | 27.0 | Printers | 1,500 | \$310,500 |
| Dst Output | Kansas City | 27.0 | Printers | 300 | \$62,100 |
| Trabon Paris Printing Co | Kansas City | 27.0 | Printers | 125 | \$25,875 |
| Nazarene Publishing House | Kansas City | 27.0 | Periodicals-Publishing & Printing | 250 | \$22,000 |
| Z-International Inc | Kansas City | 27.0 | Labels (Manufacturers) | 255 | \$36,465 |
| Z Label Systems | Kansas City | 27.0 | Labels (Manufacturers) | 200 | \$28,600 |
| Hallmark Cards Inc | Kansas City | 27.0 | Greeting Cards-Manufacturers | 5,000 | \$0 |
| Henry Wurst Inc | Kansas City | 27.0 | Commercial Printing NEC | 400 | \$48,300 |
| Universal Manufacturing Co | Kansas City | 27.0 | Commercial Printing NEC | 250 | \$35,750 |
| Commercial Lithographing | Kansas City | 27.0 | Commercial Printing NEC | 167 | \$23,881 |
| Stamps Fulfillment Svc | Kansas City | 27.0 | Catalog Compilers | 200 | \$60,000 |
| Data Source Inc | Kansas City | 27.0 | Business Forms & Systems-Manufacturers | 150 | \$47,700 |
| Sika Corp | Grandview | 28.0 | Adhesives & Sealants (Manufacturers) | 300 | \$162,000 |
| Bayer Corp Agriculture Div | Kansas City | 28.0 | Pesticides & AG Chemicals NEC (Mfrs) | 1,500 | \$1,906,500 |
| Cook Composites & Polymers | Kansas City | 28.0 | Chemicals-Manufacturers | 250 | \$0 |
| Vance Brothers Inc | Kansas City | 29.0 | Asphalt & Asphalt Products-Manufacturers | 130 | \$20,000 |
| Vance Brothers | Kansas City | 29.0 | Asphalt & Asphalt Products-Manufacturers | 120 | \$88,080 |
| Mission Plastics North | Grandview | 30.0 | Plastics-Mold-Manufacturers | 160 | \$36,320 |
| CKS Packaging Inc | Kansas City | 30.0 | Plastics & Plastic Products (Mfrs) | 130 | \$29,510 |
| Plastic Enterprises Co Inc | Lees Summit | 30.0 | Plastics-Products-Finished-Manufacturers | 201 | \$13,200 |
| R & D Tool & Engineering Co | Lees Summit | 30.0 | Plastics & Plastic Products (Mfrs) | 330 | \$25,000 |
| Lafarge Corp | Independence | 32.0 | Ready-Mixed Concrete-Manufacturers | 115 | \$38,410 |
| Barbour Concrete Co | Independence | 32.0 | Concrete Prods-Ex Block & Brick (Mfrs) | 101 | \$20,503 |
| George P Reintjes Co | Kansas City | 32.0 | Refractories | 100 | \$50,000 |
| Maxi-Seal Harness Systems | Grandview | 33.0 | Wire Harnesses-Electrical-Manufacturers | 170 | \$65,620 |
| Weld Wheel Distributing | Kansas City | 33.0 | Wheels-Manufacturers | 275 | \$16,600 |
| Specialty Products Greenwood | Greenwood | 34.0 | Tools-Manufacturers | 150 | \$34,500 |
| Ronson Machine & Mfg Inc | Independence | 34.0 | Sheet Metal Fabricators | 100 | \$20,500 |
| Alliance Lake City | Independence | 34.0 | Guns Manufacturers | 1,200 | \$288,000 |
| Bratton Corp | Kansas City | 34.0 | Steel-Structural (Manufacturers) | 100 | \$21,400 |
| A Zahner Sheet Metal Co | Kansas City | 34.0 | Sheet Metal Fabricators | 100 | \$20,500 |
| Latshaw Enterprises Inc | Kansas City | 34.0 | Screw Machine Products (Manufacturers) | 100 | \$0 |
| Butler Buildings Div | Kansas City | 34.0 | Prefabricated Metal Buildings (Mfrs) | 500 | \$0 |
| Milbank Manufacturing Co | Kansas City | 34.0 | Metal Stamping (Manufacturers) | 250 | \$53,000 |
| Western Forms | Kansas City | 34.0 | Fabricated Structural Metal (Mfrs) | 200 | \$14,800 |
| Praxair Surface Technologies | Kansas City | 34.0 | Coatings-Protective-Manufacturers | 225 | \$58,275 |
| Valspar Corp | Kansas City | 34.0 | Coatings-Protective-Manufacturers | 120 | \$31,080 |
| Ball Metal Beverage Div | Kansas City | 34.0 | Can-Manufacturers | 147 | \$124,803 |
| Fike Corp | Blue Springs | 35.0 | General Ind Machinery/Equip NEC (Mfrs) | 300 | \$73,500 |
| Nu-Tech Industries Inc | Grandview | 35.0 | Machine Shops | 104 | \$0 |
| Thyssenkrupp Access | Grandview | 35.0 | Elevators & Moving Stairways (Mfrs) | 250 | \$0 |
| Midland Lithographing Co | Kansas City | 35.0 | Metal Forming Machinery (Manufacturers) | 103 | \$40,000 |
| Frederick Manufacturing Corp | Kansas City | 35.0 | Lawn/Grdn Tractors/Home Lawn Eqpt (Mfrs) | 220 | \$0 |
| KCI Inc | Kansas City | 35.0 | Industrial Process-Furnaces/Ovens (Mfrs) | 170 | \$36,550 |
| BUNZL Koch Supplies | Kansas City | 35.0 | Food Products-Machinery (Manufacturers) | 250 | \$50,000 |
| Automatic Systems Inc | Kansas City | 35.0 | Conveyors & Conveying Equipment-Mfrs | 200 | \$0 |
| Shick Tube-Veyor Corp | Kansas City | 35.0 | Conveyors & Conveying Equipment-Mfrs | 125 | \$19,000 |

| Company_Name | Primary_City | SIC (2-digit) | Primary SIC Description | Location | Location |
|--------------------------------|--------------|------------------|---|----------|---------------|
| | | | | Empl | Sales (\$000) |
| GE Energy | Raytown | 35.0 | Fan & Blower Parts-Manufacturers | 200 | \$50,400 |
| Security Patrol | Kansas City | 36.0 | Security Control Equip & Systems-Mfrs | 250 | \$82,000 |
| DIT-MCO Intl | Kansas City | 36.0 | Circuit Board Assembly & Repairs (Mfrs) | 100 | \$46,368 |
| Fab Tech Inc | Lees Summit | 36.0 | Semiconductor Devices (Manufacturers) | 230 | \$0 |
| Peterson Manufacturing Co | Grandview | 37.0 | Automobile Parts & Supplies-Mfrs | 350 | \$130,900 |
| Growth Industries Inc | Grandview | 37.0 | Aircraft Components-Manufacturers | 100 | \$31,800 |
| Ford Motor Co Assembly Plant | Kansas City | 37.0 | Automobile-Manufacturers | 5,000 | \$8,035,000 |
| Permacel Automotive | Kansas City | 37.0 | Automobile Parts & Supplies-Mfrs | 300 | \$112,200 |
| Visteon Corp | Kansas City | 37.0 | Automobile Parts & Supplies-Mfrs | 108 | \$40,392 |
| Ruskin Co | Grandview | 38.0 | Dampers (Manufacturers) | 140 | \$0 |
| Dst Output | Kansas City | 38.0 | Microfilming Service Equip & Supls-Mfrs | 170 | \$58,990 |
| Beckman Coulter Inc | Kansas City | 38.0 | Laboratory Equipment & Supplies-Mfrs | 165 | \$47,355 |
| Labconco Corp | Kansas City | 38.0 | Laboratory Equipment & Supplies-Mfrs | 125 | \$31,000 |
| Hotz Business Solutions | Kansas City | 38.0 | Blueprinting Equipment & Supplies-Mfrs | 100 | \$10,000 |
| Alphapointe | Kansas City | 39.0 | Pens-Mechanical Pencils & Parts (Mfrs) | 200 | \$3,900 |
| General Electric | Raytown | 39.0 | Manufacturers | 230 | \$44,620 |
| First Federal Bank FSB | Kansas City | 60.0 | Savings & Loan Associations | 150 | \$0 |
| Mazuma Credit Union | Kansas City | 60.0 | Credit Unions | 131 | \$30,523 |
| Opportunity Unlimited Publicat | Kansas City | 60.0 | Check Cashing Service | 100 | \$37,100 |
| James B Nutter & Co | Kansas City | 61.0 | Loans | 300 | \$118,800 |
| Umb Scout Brokerage Svc Inc | Kansas City | 62.0 | Stock & Bond Brokers | 200 | \$0 |
| NFDS | Kansas City | 62.0 | Mutual Funds | 3,000 | \$1,509,000 |
| National Financial Data Svc | Kansas City | 62.0 | Financial Advisory Services | 600 | \$193,200 |
| Pioneer Financial | Kansas City | 62.0 | Financial Advisory Services | 100 | \$32,200 |
| Federal Deposit Insurance Corp | Kansas City | 63.0 | Government-Insurance Carriers NEC | 200 | \$183,400 |
| Government Employees Hosp Assn | Independence | 64.0 | Insurance | 900 | \$176,400 |
| GE Insurance Solutions | Kansas City | 64.0 | Insurance | 1,000 | \$0 |
| Fidelity Security Life Ins Co | Kansas City | 64.0 | Insurance | 250 | \$49,000 |
| AON Risk Svc | Kansas City | 64.0 | Insurance | 150 | \$29,400 |
| Primerica Financial Svc | Kansas City | 64.0 | Insurance | 100 | \$19,600 |
| Space Center Distribution | Independence | 65.0 | Real Estate Management | 100 | \$13,400 |
| Xceligent | Independence | 65.0 | Real Estate Consultants | 100 | \$21,900 |
| Block Asset Management | Kansas City | 65.0 | Real Estate Consultants | 150 | \$32,850 |
| Aquila Inc | Kansas City | 67.0 | Utilities-Holding Companies | 690 | \$0 |
| Great Plains Energy Inc | Kansas City | 67.0 | Utilities-Holding Companies | 256 | \$0 |
| Dickinson Financial Corp | Kansas City | 67.0 | Holding Companies (Bank) | 185 | \$0 |
| Commerce Bancshares Inc | Kansas City | 67.0 | Holding Companies (Bank) | 101 | \$0 |
| H & R Block Inc | Kansas City | 72.0 | Tax Return Preparation & Filing | 500 | \$0 |
| Love Box Co | Independence | 73.0 | Display Designers & Producers | 115 | \$30,245 |
| Infinity Promotions Group | Kansas City | 73.0 | Promotions & Fund Raising | 100 | \$4,900 |
| Mobilfone Inc | Kansas City | 73.0 | Paging & Signaling Equip/Systems Rpr | 150 | \$10,000 |
| Southeast Enterprises Pkg | Kansas City | 73.0 | Packaging Service | 175 | \$3,299 |
| Packaging Dynamics Inc | Kansas City | 73.0 | Packaging Service | 100 | \$13,900 |
| Universal Press Syndicate | Kansas City | 73.0 | News Service | 200 | \$38,600 |
| Psi Group Inc | Kansas City | 73.0 | Mailing & Shipping Services | 100 | \$21,000 |
| Ozburn-Hessey Logistics | Kansas City | 73.0 | Distribution Services | 100 | \$22,600 |
| Dst Technologies | Kansas City | 73.0 | Data Processing Service | 3,000 | \$0 |
| Sun Gard | Kansas City | 73.0 | Data Processing Service | 100 | \$18,600 |
| Exhibit Hall | Kansas City | 73.0 | Convention & Meeting Facilities & Svc | 215 | \$35,045 |
| B G Svc Solutions | Kansas City | 73.0 | Building Maintenance | 100 | \$3,100 |
| Bernstein Rein | Kansas City | 73.0 | Advertising-Agencies & Counselors | 280 | \$150,000 |
| Barkley Evergreen & Partners | Kansas City | 73.0 | Advertising-Agencies & Counselors | 280 | \$54,500 |
| Nicholson Kovac Inc | Kansas City | 73.0 | Advertising-Agencies & Counselors | 112 | \$23,408 |
| Adesa Auto Auction | Lees Summit | 73.0 | Auctioneers | 357 | \$63,546 |
| USA-800 | Raytown | 73.0 | Advertising-Direct Mail | 375 | \$78,750 |
| Kansas City Repertory Theater | Kansas City | 79.0 | Theatres-Live | 100 | \$14,100 |
| Centerplate | Kansas City | 79.0 | Concessionaires | 750 | \$63,000 |
| Ameristar Casino Kansas City | Kansas City | 79.0 | Casinos | 2,000 | \$0 |
| Isle of Capri Casino | Kansas City | 79.0 | Casinos | 750 | \$72,000 |
| Kansas City Royals Baseball | Kansas City | 79.0 | Baseball Clubs | 1,300 | \$75,400 |
| Worlds of Fun | Kansas City | 79.0 | Amusement Places | 2,200 | \$184,800 |
| St Marys Hospital-Blue Springs | Blue Springs | 80.0 | Hospitals | 740 | \$78,440 |
| Independence Regional Health | Independence | 80.0 | Hospitals | 1,700 | \$123,200 |
| MEDICAL Center Independence | Independence | 80.0 | Hospitals | 500 | \$38,500 |
| Crittenton Behavioral Health | Kansas City | 80.0 | Mental Health Services | 300 | \$24,300 |
| Two Rivers Psychiatric Hosp | Kansas City | 80.0 | Mental Health Services | 200 | \$16,200 |
| Research Psychiatric Ctr | Kansas City | 80.0 | Mental Health Services | 180 | \$9,625 |
| St Lukes Hospital | Kansas City | 80.0 | Hospitals | 3,500 | \$371,000 |
| Children's Mercy Hospital | Kansas City | 80.0 | Hospitals | 3,500 | \$184,800 |
| Truman Medical Ctr | Kansas City | 80.0 | Hospitals | 3,000 | \$34,700 |

| Company_Name | Primary_City | SIC | | Location | Location |
|-----------------------------------|--------------|-----------|--|---------------|-------------------|
| | | (2-digit) | Primary SIC Description | Emply | Sales (\$000) |
| Baptist-Lutheran Medical Ctr | Kansas City | 80.0 | Hospitals | 900 | \$95,400 |
| Kindred Hospital Kansas City | Kansas City | 80.0 | Hospitals | 350 | \$37,100 |
| Eye Foundation-Kansas City | Kansas City | 80.0 | Hospitals | 163 | \$17,278 |
| Lakewood Medical Pavilion | Kansas City | 80.0 | Hospitals | 163 | \$17,278 |
| Lakewood Truman Medical Ctr | Kansas City | 80.0 | Hospitals | 163 | \$17,278 |
| Truman Med Ctr E | Kansas City | 80.0 | Hospitals | 163 | \$17,278 |
| Truman Medical Ctr Dental | Kansas City | 80.0 | Hospitals | 163 | \$17,278 |
| Baptist Lutheran Medical Ctr | Kansas City | 80.0 | Hospitals | 163 | \$17,278 |
| Care Unit Hosp Prgm Adult Prgm | Kansas City | 80.0 | Hospitals | 163 | \$17,278 |
| Careunit Hospital Prgm | Kansas City | 80.0 | Hospitals | 163 | \$17,278 |
| Eye Foundation of Kansas City | Kansas City | 80.0 | Hospitals | 163 | \$17,278 |
| Truman Medical Ctr | Kansas City | 80.0 | Hospitals | 163 | \$17,278 |
| US Veterans Medical Ctr | Kansas City | 80.0 | Government-Specialty Hosp Ex Psychiatric | 1,400 | \$126,000 |
| Lee's Summit Hospital | Lees Summit | 80.0 | Hospitals | 163 | \$17,278 |
| Cushing Law Office | Grandview | 81.0 | Attorneys | 263 | \$43,921 |
| Blackwell Sanders Peper Martin | Kansas City | 81.0 | Attorneys | 400 | \$66,800 |
| Stinson Morrison Hecker LLP | Kansas City | 81.0 | Attorneys | 400 | \$0 |
| Blackwell Sanders Peper Martin | Kansas City | 81.0 | Attorneys | 350 | \$58,450 |
| Polsinelli Shalton Welte | Kansas City | 81.0 | Attorneys | 300 | \$0 |
| Shughart Thomson & Kilroy PC | Kansas City | 81.0 | Attorneys | 300 | \$0 |
| Spencer Fane Britt & Browne | Kansas City | 81.0 | Attorneys | 250 | \$0 |
| Shugart Thomson & Kilroy Attys | Kansas City | 81.0 | Attorneys | 220 | \$36,740 |
| Sonnenschein Nath & Rosenthal | Kansas City | 81.0 | Attorneys | 200 | \$33,400 |
| Bryan Cave | Kansas City | 81.0 | Attorneys | 175 | \$29,225 |
| Husch Family Office | Kansas City | 81.0 | Attorneys | 130 | \$21,710 |
| Lewis Rice & Fingersh | Kansas City | 81.0 | Attorneys | 100 | \$16,700 |
| Lathrop & Gage LC | Kansas City | 82.0 | Special Interest Libraries | 450 | \$0 |
| University of Mo-Kansas City | Kansas City | 82.0 | Schools-Universities & Colleges Academic | 3,350 | \$0 |
| Umkc-School of Education | Kansas City | 82.0 | Schools-Universities & Colleges Academic | 100 | \$0 |
| University of Mo Kansas City | Kansas City | 82.0 | Schools-Medical | 400 | \$0 |
| College of Osteopathic Med | Kansas City | 82.0 | Schools-Medical | 276 | \$0 |
| Cleveland Chiropractic College | Kansas City | 82.0 | Schools-Chiropractic | 100 | \$0 |
| UMKC Community Music Acad | Kansas City | 82.0 | Music Instruction-Instrumental | 100 | \$8,800 |
| Univ of Missouri-Kc Libraries | Kansas City | 82.0 | Libraries-Institutional | 153 | \$0 |
| Univ of Missouri Dental School | Kansas City | 82.0 | Dental Schools | 400 | \$0 |
| Unity School of Christianity | Lees Summit | 82.0 | Theological Schools | 700 | \$29,200 |
| Kansas City Zoo | Kansas City | 84.0 | Zoos | 150 | \$0 |
| Nelson-Atkins Museum of Art | Kansas City | 84.0 | Museums | 456 | \$0 |
| Stowers Institute-Med Research | Kansas City | 87.0 | Research Service | 250 | \$33,750 |
| Fleishman-Hillard Inc | Kansas City | 87.0 | Public Relations Counselors | 110 | \$23,100 |
| Hantover Inc | Kansas City | 87.0 | Marketing Programs & Services | 120 | \$27,600 |
| VML Inc | Kansas City | 87.0 | Marketing Consultants | 200 | \$0 |
| Midwest Research Institute | Kansas City | 87.0 | Laboratories-Research & Development | 400 | \$242,000 |
| Cerner Corp | Kansas City | 87.0 | Health Care Management | 1,800 | \$0 |
| Kingston Environmental Svc Inc | Kansas City | 87.0 | Fuel Management | 100 | \$13,300 |
| Ewing Marion Kauffman Fndtn | Kansas City | 87.0 | Foundation-Educ Philanthropic Research | 100 | \$0 |
| Burns & Mc Donnell | Kansas City | 87.0 | Engineers-Professional | 1,201 | \$0 |
| Transystems Corp | Kansas City | 87.0 | Engineers-Professional | 120 | \$24,840 |
| Honeywell Federal Mfg & Tech | Kansas City | 87.0 | Energy Conservation & Mgmt Consultants | 3,000 | \$0 |
| HNTB Corp | Kansas City | 87.0 | Architects | 500 | \$210,000 |
| Hellmuth Obata & Kassabaum | Kansas City | 87.0 | Architects | 210 | \$43,470 |
| Bucher Willis & Ratliff Corp | Kansas City | 87.0 | Architects | 125 | \$25,875 |
| Ellerbe Becket | Kansas City | 87.0 | Architects | 120 | \$24,840 |
| BNIM Architects | Kansas City | 87.0 | Architects | 115 | \$23,805 |
| 360 Architecutre | Kansas City | 87.0 | Architects | 100 | \$20,700 |
| Ernst & Young | Kansas City | 87.0 | Accountants | 300 | \$51,900 |
| Kp & G | Kansas City | 87.0 | Accountants | 300 | \$51,900 |
| KPMG Peat Marwick | Kansas City | 87.0 | Accountants | 300 | \$51,900 |
| Deloitte | Kansas City | 87.0 | Accountants | 250 | \$43,250 |
| BKD Technologies | Kansas City | 87.0 | Accountants | 200 | \$34,600 |
| Pricewaterhouse Coopers | Kansas City | 87.0 | Accountants | 140 | \$24,220 |
| Mc Gladrey & Pullen | Kansas City | 87.0 | Accountants | 120 | \$20,760 |
| Winchester DST Systems | Raytown | 87.0 | Marketing Consultants | 300 | \$69,000 |
| Intelesys | Lees Summit | 89.0 | Service Bureaus | 150 | \$20,100 |
| Transportation Dept | Lees Summit | 96.0 | State Government-Transportation Programs | 250 | \$0 |
| Total Employment and Sales | | | | 90,887 | 20,236,839 |

Appendix C:
General Aviation Flight Plan Activity Data

Creve Coeur Airport

| Firm | City | State | ZIP | Aircraft | Make/Model | Class | Ops |
|--|------------------|-------|------------|----------|--------------------------|--------|-----|
| Limb-A-Nator Llc | St Charles | Mo | 63303 | N2966X | PIPER PA-32-300 | PISTON | 54 |
| Aresti Associates LLC (C/O James S Greenwood) | Saint Louis | Mo | 63141-7218 | N700SS | BEECH A36 | PISTON | 31 |
| Alseth Engineering Llc | Kirkwood | Mo | 63122-3809 | N1341H | PIPER PA-28-181 | PISTON | 26 |
| Low Daniel A | Creve Coeur | Mo | 63141-7821 | N58144 | MOONEY M20J | PISTON | 25 |
| Grant William M | Bolivar | Mo | 65613-8447 | N20834 | CESSNA 172M | PISTON | 20 |
| Gaspar Tomas M | Champlin | Mn | 55316-3579 | N9000L | MOONEY M20C | PISTON | 19 |
| Ms Flying Inc | Monett | Mo | 65708-8330 | N191JH | BEECH A36 | PISTON | 18 |
| Amys Aircraft | Bridgeton | Mo | 63044-2211 | N16253 | PIPER PA-32-300 | PISTON | 15 |
| Parish Planes Llc | Tullahoma | Tn | 37388-0550 | N404JP | BEECH C90 | TURBO | 12 |
| Annin John A | St Charles | Mo | 63303 | N2739Y | BEECH 95 | PISTON | 11 |
| Trc Properties Llc | Phoenix | Az | 85044-2477 | N1258Z | BEECH N35 | PISTON | 11 |
| Scheve William J | Saint Louis | Mo | 63130-2923 | N3724T | PIPER PA-28R-180 | PISTON | 10 |
| Brinker Brian J | Maplewood | Mo | 63143-3905 | N30235 | CESSNA 177 | PISTON | 9 |
| Sofair Of Marco Island Inc | Marco Island | Fl | 34145-4727 | N250SW | CESSNA 335 | PISTON | 9 |
| Air Charter Express | High Ridge | Mo | 63049-1974 | N71WB | BEECH E-90 | TURBO | 8 |
| Daytech Investment Llc | Warrenton | Mo | 63383-9801 | N2966Y | PIPER PA-32R-301 | PISTON | 8 |
| Go Air Enterprised Inc | North Manchester | In | 46962-8148 | N325BB | PIPER PA-31-325 | PISTON | 8 |
| Sherwin Peter | Saint Louis | Mo | 63141-8153 | N7727Q | CESSNA 310Q | PISTON | 8 |
| Central Missouri State University | Warrensburg | Mo | 64093 | N6AM | BEECH 76 | PISTON | 7 |
| Christian Robert D | Flowery Branch | Ga | 30542-7536 | N6928B | BEECH A36 | PISTON | 7 |
| Downing Eric D | Saint Charles | Mo | 63301-4113 | N9628Y | BEECH P35 | PISTON | 7 |
| Steinke Brothers Aviation Llc | Wilmington | De | 19810-4902 | N55421 | PIPER PA-28-180 | PISTON | 7 |
| Tango Llc | Chesterfield | Mo | 63017-2085 | N8324T | PIPER PA-32-301 | PISTON | 7 |
| Apex Aviation Co Inc (C/O Corporation Trust) | Wilmington | De | 19801 | N5886S | BEECH 95-B55 (T42A) | PISTON | 6 |
| Hoeltzli Sydney D | Maplewood | Mo | 63143-3029 | N74624 | GRUMMAN AMERICAN AVN. CC | PISTON | 6 |
| Meloche Urban J | Mukwanago | Wi | 53149 | N7201P | MOONEY M20J | PISTON | 6 |
| Paynter Jo Anne | Grove City | Oh | 43123-9181 | N128PF | CIRRUS DESIGN CORP SR22 | PISTON | 6 |
| Six4Asix Inc | Wilmington | De | 19810-4902 | N33354 | PIPER PA-32-300 | PISTON | 6 |
| St Marie Airlines Llc | Carmel | In | 46032-7933 | N8432B | PIPER PA-32R-301 | PISTON | 6 |
| Christensen Del S | Friendswood | Tx | 77546-5505 | N8575T | CESSNA 182 | PISTON | 5 |
| Haug Rudolph Jr | Columbia | Il | 62236-2633 | N9253Q | BEECH V35B | PISTON | 5 |
| Kerner Frank W | Saint Charles | Mo | 63304-7776 | N345U | BEECH A36 | PISTON | 5 |
| Murphy Stephen P | Burlington | Ia | 52601-3484 | N4102G | CESSNA 340A | PISTON | 5 |
| R H K Of Kansas Inc | Topeka | Ks | 66603-3415 | N901TS | RAYTHEON Aircraft | TURBO | 5 |
| Womack Willard A | Heber Springs | Ar | 72543 | N8491N | BEECH D55 | PISTON | 5 |
| Arko Llc | Lyndon Station | Wi | 53944-9606 | N10XE | CESSNA 340 | PISTON | 4 |
| Avp Holdings Of Delaware Llc | Overland Park | Ks | 66207-4003 | N511PB | PILATUS PC-12/45 | PISTON | 4 |
| Barnes John E | Alabaster | Al | 35007 | N1121X | PIPER PA28-151 | PISTON | 4 |
| Beartooth Aviation Llc | Eden Prairie | Mn | 55344-7933 | N715MC | SOCATA TBM 700 | TURBO | 4 |
| Bradburry Christopher M | Canyon | Tx | 79015-6315 | N205MH | MOONEY M20J | PISTON | 4 |
| Buerge Alden D DbA | Joplin | Mo | 64804-4224 | N818JC | BEECH 58 | PISTON | 4 |
| Central Missouri State University | Warrensburg | Mo | 64093 | N1518X | PIPER PA-34-200T | PISTON | 4 |
| Coffey Stephen L | Omaha | Ne | 68106-2144 | N920SC | CIRRUS DESIGN CORP SR20 | PISTON | 4 |
| Demmer William S | San Antonio | Tx | 78209 | N745AA | PIPER PA-32-300 | PISTON | 4 |
| Durham Co | Lebanon | Mo | 65536-0908 | N3084K | BEECH 300 | TURBO | 4 |
| Dykes Don A | Houston | Tx | 77070-1350 | N5268T | PIPER PA-28-180 | PISTON | 4 |
| Engineering Perspective Inc | Independence | Mo | 64055-2019 | N162TC | CESSNA 182S | PISTON | 4 |
| Helicopters Inc | Cahokia | Il | 62206-1469 | N2U | BEECH 200 | TURBO | 4 |
| Hfw Industries Incorporated | Buffalo | Ny | 14207 | N4601W | CESSNA P210N | PISTON | 4 |
| Holt Equipment Lp | Bolivar | Mo | 65613 | N7323Y | PIPER PA-30 | PISTON | 4 |
| Jack Butler Aviation Llc | Indianapolis | In | 46250-5677 | N994SB | CIRRUS DESIGN CORP SR22 | PISTON | 4 |
| Mesa Aviation | Dodge City | Ks | 67801-2324 | N1607M | CESSNA T210M | PISTON | 4 |
| Missouri Highway And Transportation Department | Jefferson City | Mo | 65102 | N9921H | CESSNA 182R | PISTON | 4 |
| Mosesson Michael W | Milwaukee | Wi | 53202-6702 | N9390P | PIPER PA-24-260 | PISTON | 4 |
| Nob Hill Flyers Llc | Santa Rosa | Ca | 95403-0919 | N1547C | CIRRUS DESIGN CORP SR22 | PISTON | 4 |
| Plote Construction Inc | Elgin | Il | 60120-1699 | N3692G | BEECH 58 | PISTON | 4 |
| Rlb Holdings Llc | Crown Point | In | 46307-9488 | N5374A | CESSNA T210N | PISTON | 4 |
| S&D Equipment Leasing Llc | Blytheville | Ar | 72315-8000 | N432KC | PIPER PA-32R-301 | PISTON | 4 |
| Sale Reported | Topeka | Ks | 66614-4885 | N4657F | CESSNA P206A | PISTON | 4 |
| Tristen Lee Inc | Bear | De | 19701-2295 | N588P | BEECH 58 | PISTON | 4 |
| Unknown5 | ??? | ??? | | N994SB | | PISTON | 4 |
| Wood Farms Transportation Inc | Birmingham | Al | 35261-0130 | N988C | SOCATA TBM 700 | TURBO | 4 |
| Zachry Construction Corp | San Antonio | Tx | 78224-0130 | N2ZC | CESSNA 560XL | JET | 4 |
| Zachry Construction Corp | San Antonio | Tx | 78224-0130 | N6646F | PIPER PA-34-200T | PISTON | 3 |
| A & L Of Newton County Llc | Neosho | Mo | 64850-0177 | N340AL | CESSNA 340A | PISTON | 3 |
| Bangert Computer Systems Inc | Burlington | Ia | 52601-5430 | N9424S | BEECH V35 | PISTON | 3 |
| Engineering Methods Inc | Cincinnati | Oh | 45242-3784 | N741SB | MOONEY M20M | PISTON | 3 |
| Heartland Ltd (C/O Larry Qualls) | Wilmington | De | 19810-4902 | N421LQ | CESSNA 421C | PISTON | 3 |
| Heaton Chevrolet Oldsmobile Geo Inc | Pittsfield | Il | 62363 | N310MD | CESSNA 310N | PISTON | 3 |
| Jefferson City Aviation Inc DbA | Jefferson City | Mo | 65101-5028 | N3281K | BEECH 58 | PISTON | 3 |
| Kuczer Ronald R | Chesterfield | Mo | 63017-0702 | N6310L | AMERICAN AVIATION AA-1A | PISTON | 3 |
| Lakey Robert E | Arlington | Tx | 76013 | N7236B | BEECH J35 | PISTON | 3 |
| Letrello Michael F | Saint Charles | Mo | 63303-1723 | N6787T | GRUMMAN AMERICAN AVN. CC | PISTON | 3 |
| N Wolf And Co Inc | Lincoln | Il | 62656-5420 | N8951J | PIPER PA-28-180 | PISTON | 3 |
| Pierce Stephen C | Saint Ann | Mo | 63074-1615 | N6637A | CESSNA 172 | PISTON | 3 |
| Rjd Goup Lc | Sedalia | Mo | 65302-0031 | N311SK | CESSNA 310R | PISTON | 3 |

| Firm | City | State | ZIP | Aircraft | Make/Model | Class | Ops |
|---|------------------|-------|------------|----------|----------------------------|--------|-----|
| 43Bs Llc | Wilmington | De | 19808-1645 | N43BS | BEECH 95-B55 (T42A) | PISTON | 2 |
| Aden Michael L | Bethalto | Il | 62010-1639 | N9458A | CESSNA 140A | PISTON | 2 |
| Air Charter Express Inc | High Ridge | Mo | 63049-1974 | N555RP | BEECH 95-B55 (T42A) | PISTON | 2 |
| Air Lexington Inc | Lexington | Ky | 40510-9686 | N27527 | PIPER PA-31-350 | PISTON | 2 |
| Air Partners Inc | Wichita | Ks | 67207-5090 | N195CD | CIRRUS DESIGN CORP SR20 | PISTON | 2 |
| Air_Craft Builders Associates LLC (C/O David McNe | Mesa | Az | 85215-3505 | N48007 | Aircraft | | 2 |
| Airregency Llc | Ozark | Mo | 65721-8135 | N2569S | CESSNA 337C | PISTON | 2 |
| Ash Investments Llc | Wichita | Ks | 67206-4202 | N2182W | CESSNA 182T | PISTON | 2 |
| B K Air Llc | Bellevue | Mi | 49021-8211 | N3024S | PIPER PA-28-161 | PISTON | 2 |
| Baron Lake Llc | Jefferson | La | 70121-2901 | N3848Y | BEECH 58P | PISTON | 2 |
| Baum John E | Medford | Or | 97504-8913 | N772PJ | CESSNA T182T | PISTON | 2 |
| Berens James J Jr | Scottsdale | Az | 85255-3003 | N8003R | BEECH A36 | PISTON | 2 |
| Bill Lyon'S Car Co Inc | Mason City | Ia | 50401-7339 | N4657F | CESSNA P206A | PISTON | 2 |
| Booher Harry R | Vine Grove | Ky | 40175-9441 | N3842W | PIPER PA-32-260 | PISTON | 2 |
| Briggs Richard G | Saint Charles | Mo | 63304-7827 | N7313Q | CESSNA 182P | PISTON | 2 |
| Buffalo West Aviation Llc | Buffalo | Mn | 55313-4210 | N8558C | PIPER PA-34-200T | PISTON | 2 |
| Burlington Veterinary Systems Llc | Burlington | Ks | 66839 | N5519U | BEECH A36 | PISTON | 2 |
| Cardinal Daniel E Iii | Arbor Vitae | Wi | 54568-9539 | N8817P | PIPER PA-24-260 | PISTON | 2 |
| Carlock Air Llc | Jackson | Tn | 38305 | N5178J | CESSNA 340A | PISTON | 2 |
| Catering By Marlins Inc | Sioux Falls | Sd | 57104-0868 | N174DM | RAYTHEON Aircraft | | 2 |
| Centennial Air Transport Llc | Newport News | Va | 23606-4270 | N74B | RAYTHEON Aircraft | | 2 |
| Central Missouri State University | Warrensburg | Mo | 64093 | N453CM | CESSNA 172R | PISTON | 2 |
| Cirrus Design | Duluth | Mn | 55811-1548 | N968RA | CIRRUS DESIGN CORP SR20 | PISTON | 2 |
| Cirrus Design Corp | Duluth | Mn | 55811 | N769CD | CIRRUS DESIGN CORP SR22 | PISTON | 2 |
| Conrad Co Inc | Columbus | Oh | 43219 | N3110A | BEECH 95-B55 (T42A) | PISTON | 2 |
| Cooley Bros Aviation Inc | Bourbonnais | Il | 60914-1085 | N562T | BEECH 95-55 | PISTON | 2 |
| Cortez Ernesto | Clarksville | Tn | 37040-5569 | N411FL | PIPER PA-28-140 | PISTON | 2 |
| Cortez Ernesto | Clarksville | Tn | 37040-5569 | N5336A | CESSNA 310 | PISTON | 2 |
| Cottingham And Butler Ins Svc Inc | Dubuque | Ia | 52004-0028 | N187CB | PIPER PA-31-350 | PISTON | 2 |
| Crawford Loel H | La Follette | Tn | 37766-6562 | N8830M | BEECH S35 | PISTON | 2 |
| D & D Aviation Inc | Grandview | Mo | 64030-2875 | N588KC | PILATUS Aircraft | | 2 |
| Dedinas Timothy E Trustee | Rockford | Mi | 49341-8213 | N4261T | PIPER PA-32-260 | PISTON | 2 |
| Derby Air Llc | Willoughby | Oh | 44094-8189 | N94EW | PIPER PA-42 | TURBO | 2 |
| Dingledine Trucking Co Inc | Urbana | Oh | 43078-9387 | N3291M | CESSNA 310R | PISTON | 2 |
| E W Marine Inc | Elkhart | In | 46515-1158 | N4441T | CESSNA 441 | TURBO | 2 |
| Enginaires Aero Club | Savoy | Il | 61874-0711 | N1959H | PIPER PA-28-181 | PISTON | 2 |
| Evans Keri Y | Warrenton | Mo | 63383-6413 | N36691 | PIPER PA-32RT-300 | PISTON | 2 |
| Fayetteville Flying Services Inc | Fayetteville | Ar | 72703-9803 | N783SC | CESSNA TR182 | PISTON | 2 |
| Firs Partners Corp | Conway | Ar | 72034-5525 | N4135S | BEECH V35B | PISTON | 2 |
| Five Star Aero Llc | Strafford | Mo | 65757-7213 | N590PS | RAYTHEON Aircraft | | 2 |
| Fly Well Flying Club Inc (C/O Joe Gabler) | Coon Rapids | Mn | 55448 | N40033 | PIPER PA-32R-300 | PISTON | 2 |
| Flying High Inc | Lexington | Ky | 40503-2521 | N213JP | PIPER PA-46-310P | PISTON | 2 |
| Foulkes Guy D | Macon | Ga | 31201-7530 | N277CC | BEECH 58 | PISTON | 2 |
| Freeman Tim | Montgomery | Al | 36117-8429 | N4375L | CESSNA 172G | PISTON | 2 |
| Gaines Albert N | Garden City | Ks | 67846-5822 | N6564V | BELLANCA 17-30 | PISTON | 2 |
| General Electric Capital Corp | Dallas | Tx | 75240-1003 | N75ZT | BEECH B200 | TURBO | 2 |
| Gottschang Harry L | South Vienna | Oh | 45369-9728 | N528X | CESSNA 310F | PISTON | 2 |
| Gross Bruce | Salida | Co | 81201 | N2176V | PIPER PA-32RT-300T | PISTON | 2 |
| Gto Enterprises Inc | Fort Pierce | Fl | 34981-4815 | N741JR | RAYTHEON Aircraft | | 2 |
| Gulley Cameron L | Eastland | Tx | 76448-3014 | N369G | BEECH 36 | PISTON | 2 |
| Hain Harlon A | Bellevue | Ne | 68005-4948 | N9364P | PIPER PA-24-260 | PISTON | 2 |
| Halfwassen Colin | Champaign | Il | 61821-7015 | N64793 | BEECH A36 | PISTON | 2 |
| Hawkins George W Iv | Sugar Land | Tx | 77478-4163 | N2176Q | CESSNA 177RG | PISTON | 2 |
| Heiniger Leasing Llc | Hiawatha | Ks | 66434-2263 | N1RH | PILATUS Aircraft | | 2 |
| Henshaw Michael Bradford | Harrisburg | Il | 62946-3897 | N20RN | PIPER PA-28R-201T | PISTON | 2 |
| Hill James D | Plano | Tx | 75093-8891 | N1424G | BEECH 35-B33 | PISTON | 2 |
| Hole Lotta Fun Inc | Marshall | Mo | 65340 | N200RF | BEECH C23 | PISTON | 2 |
| Hopkins Scott J | Old Saybrook | Ct | 06475-1251 | N915JH | CESSNA T210N | PISTON | 2 |
| Hughes Venture Group Inc | Wilmington | De | 19810-4902 | N971P | RAYTHEON Aircraft | | 2 |
| Inphonemation Inc | Wichita | Ks | 67203 | N386BC | REIMS AVIATION S.A. CESSNA | PISTON | 2 |
| Inter-Tel Technologies Inc | Reno | Nv | 89521-5943 | N801CT | LEARJET INC 31 | JET | 2 |
| Jabbari Gholam H | Muscatine | Ia | 52761-4654 | N3236T | BEECH A36 | PISTON | 2 |
| Jack And Bill Inc | Aurora | Il | 60506-9138 | N939RL | CESSNA 210L | PISTON | 2 |
| Jacobson Alan M | Norfolk | Va | 23507-1707 | N141AJ | PIPER AEROSTAR 601P | PISTON | 2 |
| Jdcwac Llc | Omaha | Ne | 68137-4344 | N263EA | RAYTHEON Aircraft | | 2 |
| Jetone Llc | Bloomfield Hills | Mi | 48304-5051 | N225J | CESSNA 550 | JET | 2 |
| Kline Robert H | Oley | Pa | 19547-8973 | N636B | BEECH A200 | TURBO | 2 |
| Kramme Don | Valley Park | Mo | 63088-1532 | N16313 | PIPER PA-28-235 | PISTON | 2 |
| Lunder Peter Db | Augusta | Me | 4330 | N3194X | BEECH 58 | PISTON | 2 |
| Magic Aviation Llc | Ankeny | Ia | 50021-9418 | N328DB | PIPER PA-31-325 | PISTON | 2 |
| Malik Hassan | Akron | Oh | 44333-1435 | N21921 | PIPER AEROSTAR 601P | PISTON | 2 |
| Mascari M Richard | Iowa City | Ia | 52240-4427 | N64400 | PIPER PA-24-400 | PISTON | 2 |
| Maulden Lee | Trinity | Nc | 27370-8885 | N201NF | MOONEY M20J | PISTON | 2 |
| Mca-Plane Llc | Flint | Mi | 48507 | N785JP | RAYTHEON Aircraft | | 2 |
| Mcgovern Glenn C | New Orleans | La | 70127-5206 | N35981 | CESSNA U206F | PISTON | 2 |
| Mecas Ent Inc | Jackson | Oh | 45640-8514 | N861D | BEECH E-55 | PISTON | 2 |
| Michigan Cat Aviation Llc | Novi | Mi | 48375-2414 | N24JJ | RAYTHEON Aircraft | | 2 |
| Mid-America Environmental Contractors Inc | Ozark | Ar | 72949 | N363EF | BEECH 95-B55 | PISTON | 2 |

| Firm | City | State | ZIP | Aircraft | Make/Model | Class | Ops |
|--|-----------------|-------|------------|----------|---------------------------|--------|-----|
| Midyett Charles O | Springfield | Il | 62711-8239 | N5038P | PIPER PA-24-180 | PISTON | 2 |
| Millennium Air Inc | Sioux Center | Ia | 51250-7550 | N414SP | CESSNA 414A | PISTON | 2 |
| Mirax Aviation Llc | Carmel | In | 46032-8743 | N313EE | BEECH 200 | TURBO | 2 |
| Missouri State Highway Patrol | Jefferson City | Mo | 65102 | N92MP | CESSNA 210N | PISTON | 2 |
| Mji Properties Llc | Memphis | Tn | 38119-3955 | N3710A | BEECH 200 | TURBO | 2 |
| Mmks Equipment Sales & Leasing Llc | Noblesville | In | 46062-9241 | N6537R | CESSNA T182T | PISTON | 2 |
| Mooney Airplane Company Inc | Kerrville | Tx | 78028 | N660DS | MOONEY M20R | PISTON | 2 |
| Mte Enterprises Inc | Dover | De | 19901-3265 | N9148Q | BEECH 58 | PISTON | 2 |
| N4118W Llc | Ludington | Mi | 49431-1169 | N4118W | PIPER PA-32-300 | PISTON | 2 |
| Par Five Aviation Llc | Brookfield | Wi | 53045-7411 | N820RD | BEECH E-90 | TURBO | 2 |
| Peccoud Jean | Des Moines | Ia | 50312-4640 | N6344C | PIPER PA-28-181 | PISTON | 2 |
| Pegasus Unlimited Inc | Wilmington | De | 19810-4902 | N9167P | PIPER PA-24-260 | PISTON | 2 |
| Php Leasing Inc | Olathe | Ks | 66062-5417 | N54PM | MOONEY M20J | PISTON | 2 |
| Porter Clay | Hinsdale | Il | 60521-4646 | N82AG | MOONEY M20J | PISTON | 2 |
| R & S Aviation Llc | Neenah | Wi | 54956-2966 | N32WS | ROCKWELL INTERNATIONAL 68 | TURBO | 2 |
| R D D Leasing | Elgin | Il | 60120-1699 | N560RP | CESSNA 560 | JET | 2 |
| Rce Holdings Llc | Glen Ellyn | Il | 60137-5891 | N499RC | CESSNA S550 | JET | 2 |
| Read Gary | Orion | Mi | 48359-1892 | N767TM | BEECH V35 | PISTON | 2 |
| Registration Pending | Wilmington | De | 19808-1660 | N15DN | BEECH A36 | PISTON | 2 |
| Remmers Aviation Inc | Burlington | Ia | 52601-0186 | N1195X | PIPER PA28-151 | PISTON | 2 |
| Reppert Donald L | Smyrna | Ga | 30080-3953 | N3799P | CESSNA P210N | PISTON | 2 |
| Rml Aircraft | Wichita | Ks | 67202 | N600RL | RAYTHEON Aircraft | | 2 |
| Safety Engineering Associates Inc | Madison | Wi | 53711 | N5134C | CESSNA 414A | PISTON | 2 |
| Sale Reported | Topeka | Ks | 66614-4885 | N8969J | PIPER PA-28-180 | PISTON | 2 |
| Sc Meridian Llc | Rapid City | Sd | 57702-9100 | N700ZA | SOCATA TBM 700 | TURBO | 2 |
| Shrike Aviation I Llc | Charlotte | Nc | 28270-0633 | N5708A | AERO COMMANDER 500 S | PISTON | 2 |
| Single Wings Inc, Attn: Ben Austin President | Valparaiso | In | 46385 | N3331R | PIPER PA-28-180 | PISTON | 2 |
| Smith John | Springfield | Mo | 65804 | N3625C | CESSNA R182 | PISTON | 2 |
| Templeton Aircraft | Lombard | Il | 60148-2613 | N3357W | PIPER PA-32-260 | PISTON | 2 |
| Thousand Air Inc | Sioux Center | Ia | 51250 | N8459E | PIPER PA-34-220T | PISTON | 2 |
| United States Air Force Owner | Scott Afb | Il | 62225-5335 | N8479F | PIPER PA28-151 | PISTON | 2 |
| Unknown1 | ??? | ??? | | N1493H | | PISTON | 2 |
| Unknown2 | ??? | ??? | | N2291T | | PISTON | 2 |
| Vamco International Inc | Pittsburgh | Pa | 15238-2816 | N290KA | BEECH E-90 | TURBO | 2 |
| Van Oort Johannes M | Delafield | Wi | 53018-2602 | N5336A | CESSNA 310 | PISTON | 2 |
| Viking Transport Ltd | Janesville | Wi | 53545-4038 | N3701N | BEECH A36TC | PISTON | 2 |
| Volker David P | Palm City | Fl | 34990-8338 | N934T | BEECH 35-33 | PISTON | 2 |
| Wichita Air Services Leasing Llc | Wichita | Ks | 67206-2965 | N934JD | CESSNA T310R | PISTON | 2 |
| 738Qv Inc | Chicago | Il | 60610-0842 | N738QV | CESSNA TR182 | PISTON | 1 |
| Adams Donnie D | Saint Peters | Mo | 63376-2090 | N80307 | CESSNA 172M | PISTON | 1 |
| Air Ozark Llc | Springfield | Mo | 65804-1734 | N8011F | PIPER PA-34-200T | PISTON | 1 |
| Anna Aviation Llc | Dublin | Oh | 43017-8271 | N845JB | BEECH F33A | PISTON | 1 |
| Arko Llc | Lyndon Station | Wi | 53944-9606 | N6656L | BEECH F33A | PISTON | 1 |
| Arrow Flyers Inc | Wildwood | Mo | 63038-2603 | N8648M | BEECH P35 | PISTON | 1 |
| Beaver Lake Express Llc | Wichita | Ks | 67205-1329 | N6063E | CESSNA 172N | PISTON | 1 |
| Beeds Lake Flying Inc | Hampton | Ia | 50441 | N7337Q | CESSNA 182P | PISTON | 1 |
| Berberich Stephen B | Dallas | Tx | 75244-6709 | N555PB | PIPER PA-28-180 | PISTON | 1 |
| Brandtonies Properties Llc | Leawood | Ks | 66224-3652 | N53467 | PIPER PA-28R-201 | PISTON | 1 |
| Bryson Thomas M | Jackson | Ms | 39225 | N7777R | BEECH P35 | PISTON | 1 |
| Caldwell Larry R | Florence | Ky | 41042-9540 | N234PC | CESSNA 172P | PISTON | 1 |
| Capitol City Flyers Inc (C/O Robert Hartwig) | Madison | Wi | 53716-1460 | N8483F | PIPER PA-28-181 | PISTON | 1 |
| Central Missouri State University | Warrensburg | Mo | 64093 | N460CM | CESSNA 172R | PISTON | 1 |
| Central Missouri State University | Warrensburg | Mo | 64093 | N58DA | BEECH 58 | PISTON | 1 |
| Cequel Iii Aviation Llc | Chesterfield | Mo | 63005-3708 | N300CQ | RAYTHEON Aircraft | | 1 |
| Cielazur Llc | Pearland | Tx | 77581-5741 | N219RT | SOCATA TB20 | PISTON | 1 |
| Cimarron Holdings Llc | Moore | Ok | 73160-5880 | N50FB | CESSNA 421C | PISTON | 1 |
| Cirrus Design Corp | Duluth | Mn | 55811 | N621PH | CIRRUS DESIGN CORP SR22 | PISTON | 1 |
| Compass Aviation Llc | Long Grove | Il | 60047 | N1970 | CIRRUS DESIGN CORP SR22 | PISTON | 1 |
| Cunningham Pattern & Engineering Inc | Columbus | In | 47202-0854 | N211B | BEECH 95-B55 (T42A) | PISTON | 1 |
| Flying 20 Club Inc | Springfield | Il | 62705 | N64448 | CESSNA 172M | PISTON | 1 |
| Fourth Dimension Shuttle Inc | Wilmington | De | 19810-4902 | N3556H | MOONEY Aircraft | | 1 |
| Freeport Supply Co | Wyandotte | Mi | 48192-8421 | N1642W | BEECH A60 | PISTON | 1 |
| Fuller Paul | Anderson | In | 46016 | N7828Y | PIPER PA-30 | PISTON | 1 |
| Geodata Aircraft | Wilmington | De | 19810-4902 | N4744C | CESSNA 210N | PISTON | 1 |
| Gillian Michael J | Downers Grove | Il | 60516-4938 | N711U | BEECH H35 | PISTON | 1 |
| Guyer Jerry W | Louisburg | Ks | 66053-5258 | N6748N | MOONEY M20F | PISTON | 1 |
| Hall Gerard L Trustee | Century City | Ca | 90067-3320 | N62GH | MOONEY M20R | PISTON | 1 |
| Hampton Clark W Trustee | Saint Joseph | Mo | 64506-2173 | N654H | PIPER PA-31-350 | PISTON | 1 |
| Hill L Clarke Trustee | Wentworth | Nh | 3282 | N93012 | BOEING B-17G | JET | 1 |
| Huskey Aviation Llc | Northglenn | Co | 80233-4446 | N724WA | CESSNA 172S | PISTON | 1 |
| Janicki James P | Plano | Tx | 75093-6352 | N575CD | CIRRUS DESIGN CORP SR22 | PISTON | 1 |
| Jet Transport Llc | Mitchell | In | 47446 | N847CD | CIRRUS DESIGN CORP SR22 | PISTON | 1 |
| Jrw Aviation Llc | Wilmington | De | 19808-1645 | N8137A | PIPER PA-28-236 | PISTON | 1 |
| K C Aero Leasing Ltd | Wilmington | De | 19810-4902 | N8648M | BEECH P35 | PISTON | 1 |
| Kahler Enterprises Llc | Reedsburg | Wi | 53959-1652 | N2535U | PIPER PA-28-181 | PISTON | 1 |
| Kasakoff Lloyd | Manhattan Beach | Ca | 90266-3027 | N6LL | MOONEY Aircraft | | 1 |
| Krech Kenneth G | Hollywood | Md | 20636-2136 | N64WC | PIPER PA-32-300 | PISTON | 1 |
| Lascalzo Anthony M | Hoboken | Nj | 07030-4232 | N6947N | MOONEY M20C | PISTON | 1 |

| Firm | City | State | ZIP | Aircraft | Make/Model | Class | Ops |
|---|-----------------|-------|------------|----------|---------------------|--------|-----|
| Lewis Daniel R | Coconut Grove | Fl | 33133 | N8293M | BEECH A36 | PISTON | 1 |
| Magic Aviation Llc | Ankeny | Ia | 50021-9418 | N111NW | PIPER PA-32R-300 | PISTON | 1 |
| Magnaline Corp | Columbus | In | 47201-4276 | N6429U | CESSNA TU206G | PISTON | 1 |
| Malik Hassan | Akron | Oh | 44333-1435 | N8090J | PIPER AEROSTAR 600 | PISTON | 1 |
| Michaud Arthur J | New Port Richey | Fl | 34654-5128 | N5545M | AERO COMMANDER 100 | PISTON | 1 |
| Mitchell Flying Club Inc | Lees Summit | Mo | 64064-7033 | N3488S | CESSNA 182H | PISTON | 1 |
| Modern Industries Llc | Hastings | Ne | 68902-2062 | N32W | CESSNA 210L | PISTON | 1 |
| Molder Steven H | Apple Valley | Mn | 55124-7659 | N4375Q | PIPER PA-32R-301 | PISTON | 1 |
| National Association Of System Administrators Inc | Crystal Lake | Il | 60012-3231 | N9156J | PIPER PA-28-180 | PISTON | 1 |
| Neuroth John L | Bridgeton | Mo | 63044-2807 | N2720Y | BEECH 95 | PISTON | 1 |
| On Air Company Llc | Sewickley | Pa | 15143-1123 | N22WF | PIPER PA-31T | TURBO | 1 |
| Pengilly Corp | Ellicottville | Ny | 14731-1465 | N3736F | BEECH A36TC | PISTON | 1 |
| Pinnacle Products Inc | Decatur | Al | 35601-6149 | N53UP | BEECH 95-B55 (T42A) | PISTON | 1 |
| Premier Auto Outlet Inc | Rogersville | Mo | 65742-7721 | N8359M | PIPER PA-32-301T | PISTON | 1 |
| Ptd Enterprises Llc | West Liberty | Oh | 43357-9381 | N452PD | CESSNA T182T | PISTON | 1 |
| Quinn Daniel J | Huddleston | Va | 24104-2970 | N21921 | PIPER AEROSTAR 601P | PISTON | 1 |
| Rnk Ranch Inc | Spring | Tx | 77373 | N3350P | PIPER PA-23-160 | PISTON | 1 |
| Sale Reported | Topeka | Ks | 66614-4885 | N1044X | PIPER PA-34-200T | PISTON | 1 |
| Sale Reported | Topeka | Ks | 66614-4885 | N104X | SMITH THORP T-18 | PISTON | 1 |
| Sale Reported | Topeka | Ks | 66614-4885 | N6294Y | CESSNA T182T | PISTON | 1 |
| Schindehette Russell R | Phoenix | Az | 85044-2477 | N6159B | CESSNA T210M | PISTON | 1 |
| Shergood Aviation Llc | Osage Beach | Mo | 65065-9301 | N3823U | CESSNA 336 | PISTON | 1 |
| Shoemaker Richard W | Sheboygan | Wi | 53083-4215 | N567WC | CESSNA 177RG | PISTON | 1 |
| Slwnc Inc | Raleigh | Nc | 27607-7506 | N808SW | BEECH C90 | TURBO | 1 |
| Smith Darwin L | Eagan | Mn | 55123 | N25AR | BEECH B95 | PISTON | 1 |
| Spann Rhonda R | Everton | Ar | 72633-8027 | N40023 | PIPER PA-28-161 | PISTON | 1 |
| Tat Aviation Llc | Concord | Nc | 28027-7188 | N929SP | BEECH 58 | PISTON | 1 |
| Three Eagles Inc | Wilmington | De | 19810-4902 | N5101N | CESSNA 182Q | PISTON | 1 |
| Tittle Mark B | Memphis | Tn | 38103-5837 | N1986T | PIPER PA-28R-200 | PISTON | 1 |
| Trio Bravo Ltd | Kent | Oh | 44240 | N4854J | PIPER PA-28R-180 | PISTON | 1 |
| Tristan Lee Inc | Bear | De | 19701-2295 | N771BB | RAYTHEON Aircraft | | 1 |
| Unknown3 | ??? | ??? | | N321LM | ??? | PISTON | 1 |
| Unknown4 | ??? | ??? | | N5541 | ??? | PISTON | 1 |
| Unknown6 | ??? | ??? | | N99U | ??? | TURBO | 1 |
| Vi Group | Wooster | Oh | 44691-2244 | N423JW | PIPER PA-32-300 | PISTON | 1 |
| W I Aviation Llc (C/O The Corporation Trust Co) | Wilmington | De | 19801 | N350DW | BEECH 300 | TURBO | 1 |
| Werner Albert E Trustee | Raytown | Mo | 64133-5212 | N3280R | PIPER PA-28R-180 | PISTON | 1 |
| Wings Flying Club Inc | Louisville | Ky | 40223-5534 | N40015 | PIPER PA-28-161 | PISTON | 1 |

Eldon Model Airport

| Firm | City | State | Aircraft | Make/Model | Class | Ops |
|-------------------------------------|----------------|-------|----------|-------------------------|--------|-----|
| Perkin Holding Company Inc | Rocky Mount | MO | N5319K | Piper PA46-500TP | Piston | 80 |
| Health Systems Inc | Sikeston | MO | N402JL | Raytheon B300 | Turbo | 77 |
| Bott Radio Network Inc | Gravois Mills | MO | N580S | Beech B100 | Turbo | 61 |
| Miller Fredrick E | Ames | IA | N4798P | Cessna P210N | Piston | 44 |
| Rene Investments Llc | Shawnee | OK | N8851K | Cessna 414A | Piston | 39 |
| Fehrenbach Donald | Naples | FL | N832AD | Cessna 441 | Turbo | 9 |
| Fostill West Llc | Bozeman | MT | N150TT | Cessna 500 | Jet | 9 |
| Brunet Aircraft Llc | Folly Beach | SC | N624SP | Cessna 172S | Piston | 8 |
| St Charles Flying Service Inc | Ava | IL | N7235F | Cessna T210N | Piston | 6 |
| Dunning Ira E | Rocky Mount | MO | N39836 | Bellanca 17-30A | Piston | 5 |
| Eckrich Jerome A | Aberdeen | SD | N77RE | Cessna 210N | Piston | 5 |
| Koch Phillip E | Rocky Mount | MO | N2262S | Cessna T210L | Piston | 5 |
| Perkin Marketing Llc | Ozark | MO | N5215A | Mooney M20J | Piston | 5 |
| Robinson Rick J | Eldon | MO | N13211 | Cessna 172M | Piston | 5 |
| Independence Aviation Inc | Eldon | MO | N4197S | Beech V35B | Piston | 3 |
| Unknown | ??? | ?? | N102AD | ?? | Turbo | 3 |
| Blue Sky Llc | Saint Charles | MO | N265TB | Cessna T206H | Piston | 2 |
| Dury Vernon li | Hurst | IL | N4264J | Cessna 310R | Piston | 2 |
| Fehrenbach Donald | Naples | FL | N102AD | Cessna 441 | Turbo | 2 |
| Hth Companies Inc | Union | MO | N1821E | Cessna T310R | Piston | 2 |
| J & J Auto Racing Inc | Mckenzie | TN | N5532A | Cessna 210N | Piston | 2 |
| Kansas City Aviation Center Inc | Olathe | KS | N629KC | Piper PA46-500TP | Piston | 2 |
| Midwest Direct Charters Llc | Camdenton | MO | N8170G | Piper Pa-34-220T | Piston | 2 |
| Nelson Jeffrey P | Kirkville | MO | N5537X | Beech A36 | Piston | 2 |
| New Piper Aircraft Inc | Vero Beach | FL | N629KC | Piper Pa46-500Tp | Piston | 2 |
| Northwest Aviation Llc | Fargo | ND | N15TR | Mitsubishi Mu-2B-40 | Turbo | 2 |
| Pgb Air Inc | Lakeland | FL | N5195E | Cessna 172N | Piston | 2 |
| Power Quality Associates Inc | Mt Olive | IL | N11BX | Beech F33A | Piston | 2 |
| Protocol Enterprises Llc | Holdrege | NE | N233RB | Beech 95-B55 (T42A) | Piston | 2 |
| Rosenbohm Duane K | Fairfax | MO | N6507F | Piper Pa-32R-300 | Piston | 2 |
| Sdskk Leasing Llc | Bloomington | IN | N854C | Raytheon 58 | Piston | 2 |
| Vmr Llc | Wilmington | DE | N4353Z | Piper Pa-32R-301 | Piston | 2 |
| Washburn Floyd W | Okatie | SC | N6758U | Mooney M20C | Piston | 2 |
| Yeager Fred M | Saint Charles | MO | N321DW | Cessna 310R | Piston | 2 |
| Crowe Stephen R | Columbia | MO | N2435M | Piper Pa-28-181 | Piston | 1 |
| D'Ann'Elle Marketing Associates Llc | Overland Park | KS | N56TF | Piper Pa-31-350 | Piston | 1 |
| Duncan Aviation Inc | Lincoln | NE | N44DA | Beech A36 | Piston | 1 |
| Green Aero Inc | Greenville | IL | N6435L | American Aviation Aa-1A | Piston | 1 |
| Jefferson City Aviation Inc DbA | Jefferson City | MO | N3281K | Beech 58 | Piston | 1 |
| Lakeshore Four Llc | Osage Beach | MO | N232FJ | Cirrus Design Corp Sr22 | Piston | 1 |
| Lyman James H | Las Vegas | NV | N42JL | Lyman James H Skybolt | Turbo | 1 |
| Miller Timothy D | Camdenton | MO | N1094J | Aero Commander 112 | Piston | 1 |
| Mrm Phoenix Ltd | Cape Girardeau | MO | N436RM | Beech A36 | Piston | 1 |
| Paris Air Inc | Vero Beach | FL | N24CT | Piper Pa-34-200T | Piston | 1 |
| Premier I Llc | Wilmington | DE | N128JL | Raytheon 390 | Jet | 1 |
| R H K Of Kansas Inc | Topeka | KS | N901TS | Raytheon C90A | Turbo | 1 |
| Stahla Russ | Lexington | NE | N5120H | Cessna 152 | Piston | 1 |
| Triple S Hauling Inc | Columbia | MO | N41018 | Piper Pa-31-325 | Piston | 1 |

Lee's Summit Airport

| Firm | City | State | Aircraft | Make/Model | Class | Ops |
|-------------------------------------|------------------|-------|----------|---------------------------|--------|-----|
| Major Airplane Llc | Wilmington | DE | N888EX | Beech 200 | Turbo | 173 |
| Williams David | Lees Summit | MO | N144GM | Beech P35 | Piston | 173 |
| Dejarnette Enterprises Inc | Lees Summit | MO | N773CA | Cessna 550 | Jet | 158 |
| Engineering Perspective Inc | Independence | MO | N162TC | Cessna 182S | Piston | 132 |
| Ashley Myron | Lees Summit | MO | N2446T | Ryan Navion G | Piston | 72 |
| National Limousine Service Llc | Leawood | KS | N429PC | Pilatus Pc-12/45 | Piston | 70 |
| Dejarnette Enterprises Inc | Lees Summit | MO | N2830S | Beech B100 | Turbo | 68 |
| Air Charter Sales Llc | Lees Summit | MO | N650FP | Cessna 650 | Jet | 66 |
| Stanley Bank | Overland Park | KS | N525JJ | Cessna 525 | Jet | 66 |
| Woodstock Investments Inc | Lees Summit | MO | N7979K | Beech 95-B55 (T42A) | Piston | 49 |
| Powis Michael P | Oak Grove | MO | N1576W | Beech V35B | Piston | 36 |
| Skys The Limit Enterprises Llc | Missoula | MT | N414KW | Cessna 414A | Piston | 36 |
| Peterson Daniel R Trustee | Papillion | NE | N234EB | Beech V35 | Piston | 33 |
| Wing Flying Club | Lees Summit | MO | N2211J | Piper Pa-28-236 | Piston | 32 |
| James R Vannoy & Sons Cnstr. Co Inc | Jefferson | NC | N40CJ | Cessna 525 | Jet | 28 |
| Stracner Rickey L | Lees Summit | MO | N2184T | Piper Pa-28-180 | Piston | 28 |
| Sunrise Aviation Inc | Wichita | KS | N6873Q | Cessna 425 | Turbo | 28 |
| Registration Pending | Winona | MN | N500LD | Beech 58 | Piston | 27 |
| Great Southern Bank | Springfield | MO | N900DS | Cessna 525 | Jet | 26 |
| Hawkins David W | Odessa | MO | N111YF | Beech B100 | Turbo | 26 |
| Rjd Goup Lc | Sedalia | MO | N311SK | Cessna 310R | Piston | 26 |
| Dejarnettes Enterprises | Lees Summit | MO | N111YF | Beech B100 | Turbo | 25 |
| Heartland Tanning Inc | Lees Summit | MO | N92835 | Piper Pa 46-350P | Piston | 25 |
| Unknown | ??? | ?? | N500LD | ??? | Piston | 25 |
| M J Harden Associates Inc | Kansas City | MO | N22GE | Piper Pa-31-325 | Piston | 24 |
| Ressegieu Matthew V | Overland Park | KS | N732KC | Cessna T210L | Piston | 24 |
| George J Siebers & Co Inc | Merriam | KS | N2278S | Beech B-55 | Piston | 23 |
| Silver Eagle Aerial Inc | Warrensburg | MO | N51783 | Cessna 206H | Piston | 23 |
| P & K Aviation Inc | Lees Summit | MO | N739DD | Cessna 172N | Piston | 22 |
| Lamb Jerome | Independence | MO | N1979 | Beech A36 | Piston | 21 |
| Dark Star 1 Inc | Bear | DE | N28WV | Beech 58P | Piston | 20 |
| Hasek Charles N | Lees Summit | MO | N75PR | Beech K35 | Piston | 20 |
| Husted John | Olathe | KS | N2027D | Beech 58 | Piston | 20 |
| Werner Albert E Trustee | Raytown | MO | N3280R | Piper Pa-28R-180 | Piston | 20 |
| Wing Flying Club Inc | Lees Summit | MO | N3575X | Piper Pa-28-181 | Piston | 20 |
| H & H Color Lab Inc | Wilmington | DE | N5351A | Piper Pa-34-220T | Piston | 19 |
| Central Trust Bank | Jefferson City | MO | N865M | Cessna 560 | Jet | 18 |
| Ramsey Pontiac Corp | Des Moines | IA | N5355S | Piper Pa46-500Tp | Piston | 18 |
| Owen Kevin R Trustee | Laurie | MO | N4360M | Piper Pa-34-220T | Piston | 17 |
| R & K Leasing Llc | Lees Summit | MO | N2120L | Beech 95-B55 (T42A) | Piston | 17 |
| Blue Sky Llc | Saint Charles | MO | N265TB | Cessna T206H | Piston | 16 |
| Childs Richard A | Kansas City | MO | N7433J | Piper Pa-28R-180 | Piston | 16 |
| Berry B Thomas | Lees Summit | MO | N7979K | Beech 95-B55 (T42A) | Piston | 14 |
| Blue Wings Aviation Llc | Enterprise | OR | N3214Z | Beech A36 | Piston | 14 |
| Northwind Inc | Winfield | KS | N2999K | Cessna 180K | Piston | 14 |
| Aerial Images Llc | Greenville | SC | N405JH | Cessna 182Q | Piston | 13 |
| Chris A Singleton Aviation Llc | Blue Springs | MO | N36781 | Piper Pa-32Rt-300 | Jet | 13 |
| Clayton John R | Lone Jack | MO | N9880R | Beech M35 | Piston | 12 |
| Dejarnete Enterprise Inc | Lees Summit | MO | N80759 | Cessna 172M | Piston | 12 |
| Fisher Investment Corp | Cedar Rapids | IA | N692WT | Cessna 414A | Piston | 11 |
| Grace Equipment Llc | Bend | OR | N900LL | Gulfstream Am Corp Comm D | Turbo | 11 |
| Affordable Equity Partners Inc | Columbia | MO | N6726S | Beech 58 | Piston | 10 |
| Aircraft Guaranty Title Llc Trustee | Houston | TX | N650FP | Cessna 650 | Jet | 10 |
| Bonanza Aircraft Leasing Llc | Wilmington | DE | N433RH | Beech F33A | Piston | 10 |
| Cos Aircraft Llc | Colorado Springs | CO | N134M | Piper Pa46-500Tp | Piston | 10 |
| Dejarnette Enterprises Inc | Lees Summit | MO | N63279 | Cessna 172P | Piston | 10 |
| P And K Aviation In | Lees Summit | MO | N9660Q | Cessna 172M | Piston | 10 |
| Southeast Air Transportation Inc | Montgomery | AL | N79SE | Learjet Inc 31A | Jet | 10 |
| Tax Shoppe Inc | Lees Summit | MO | N66X | Beech 95-B55 (T42A) | Piston | 10 |
| Tradewinds Aviation Ltd | Wilmington | DE | N8707K | Cessna 340A | Piston | 10 |
| Jes Aircraft Services Inc | Stilwell | KS | N275CF | Piper Pa-31-350 | Piston | 9 |
| State Of Missouri | Jefferson City | MO | N128VT | Beech B200 | Turbo | 9 |

| Firm | City | State | Aircraft | Make/Model | Class | Ops |
|---|-------------------|-------|----------|-----------------------------|--------|-----|
| Air-1 Leasing Llc | Fort Scott | KS | N1259K | Cessna 208B | Piston | 8 |
| Baas Peter J | Indianapolis | IN | N3792T | Piper Pa-28R-180 | Piston | 8 |
| Condado Land Co Llc | Leon | IA | N340UG | Cessna 340A | Piston | 8 |
| Elliot Kirby E | Holden | MO | N318CA | Piper Pa-23-250 | Piston | 8 |
| Mid America Detailers Inc | Lees Summit | MO | N909CB | Beech 35-C33 | Piston | 8 |
| Olsson Associates | Lincoln | NE | N880A | Cessna 414 | Piston | 8 |
| Sr-20 Of Arkansas Llc | Little Rock | AR | N244T | Cirrus Design Corp Sr22 | Piston | 8 |
| Coop Air Llc | Kansas City | MO | N429CM | Cessna 340A | Piston | 7 |
| Heaton Chevrolet Oldsmobile Geo Inc | Pittsfield | IL | N310MD | Cessna 310N | Piston | 7 |
| Lawing Financial Group Inc | Overland Park | KS | N540CA | Cessna 421C | Piston | 7 |
| State Of Missouri | Jefferson City | MO | N100SM | Raytheon Aircraft Company C | Turbo | 7 |
| Central Missouri State University | Warrensburg | MO | N1518X | Piper Pa-34-200T | Piston | 6 |
| Coil Construction Inc | Columbia | MO | N6254N | Beech A36 | Piston | 6 |
| Drake & Drake Inc | Gravois Mills | MO | N5266D | Cessna 172N | Piston | 6 |
| Dvdmls Inc | Moline | IL | N650DM | Socata Tbm 700 | Turbo | 6 |
| Hoepfer Terry R | Rich Hill | MO | N55QH | Raytheon Aircraft Company A | Piston | 6 |
| Hth Companies Inc | Union | MO | N1821E | Cessna T310R | Piston | 6 |
| Hubbard Patrick D | Overland Park | KS | N28PB | Cessna 182P | Piston | 6 |
| Noland Gordon M | Independence | MO | N269BA | Beech J35 | Piston | 6 |
| Osborne James W | Lake Winnebago | MO | N322U | Beech 35-C33 | Piston | 6 |
| Perkin Marketing Llc | Ozark | MO | N5215A | Mooney M20J | Piston | 6 |
| Tailwinds Flying Club | Forest Lake | MN | N73EG | Piper Pa-28R-201T | Piston | 6 |
| United States Aviation Underwriters Inc | New York | NY | N72US | Cessna 182S | Piston | 6 |
| Vogel Paint & Wax Co Inc | Orange City | IA | N26DV | Piper Pa-31T1 | Turbo | 6 |
| Air Latitude Llc | Key Largo | FL | N414SH | Cessna 414A | Piston | 5 |
| Amwil Inc | Ada | MI | N433RH | Beech F33A | Piston | 5 |
| B&A Automation And Controls Inc | Chillicothe | MO | N102RM | Piper Pa-34-200T | Piston | 5 |
| Baltz Lobton Corp | Lees Summit | MO | N500CA | Beech 95-A55 | Piston | 5 |
| Bemis Edward D | Olathe | KS | N30956 | Piper Pa-32Rt-300 | Piston | 5 |
| Camelot Aviation Llc | Dallas | TX | N1956R | Piper Pa-39 | Piston | 5 |
| Central Missouri State University | Warrensburg | MO | N212D | Beech 65-A90 | Turbo | 5 |
| Firs Partners Corp | Conway | AR | N4135S | Beech V35B | Piston | 5 |
| Freeman Burton R | Hershey | PA | N66JD | Piper Pa-32Rt-300T | Piston | 5 |
| Fugo Llc | Overland Park | KS | N316PH | Cirrus Design Corp Sr22 | Piston | 5 |
| Manneco Inc | Independence | MO | N40578 | Piper Pa-23-250 | Piston | 5 |
| Missouri Department Of Conservation | Jefferson City | MO | N402MC | Cessna 402C | Piston | 5 |
| Mitchell Flying Club Inc | Lees Summit | MO | N3488S | Cessna 182H | Piston | 5 |
| Peterson Daniel R Trustee | Papillion | NE | N28WV | Beech 58P | Piston | 5 |
| Rml Aircraft Services Llc | Wichita | KS | N600RL | Raytheon Aircraft Company B | Turbo | 5 |
| Russell Robert Lee Trustee | Naples | FL | N5461S | Cessna Tr182 | Piston | 5 |
| Tennison Harley L | Leawood | KS | N616HT | Piper Pa-28-236 | Piston | 5 |
| American Business Connections Inc | Plano | TX | N1731X | Cessna T210L | Piston | 4 |
| Andrews Stanley K | Stanberry | MO | N7560J | Piper Pa-28R-180 | Piston | 4 |
| Archer-Daniels-Midland Co | Decatur | IL | N848DM | Cessna 560XI | Jet | 4 |
| Bank of America NA (c/o United Amer. In | Mckinney | TX | N151TM | Cessna 550 | Jet | 4 |
| Beachner Danny D | Fort Walton Beach | FL | N80759 | Cessna 172M | Piston | 4 |
| Blc Corp | Harrison | NY | N598AC | Beech B300 | Turbo | 4 |
| Blue Hills Air Llc | Portland | OR | N3214Z | Beech A36 | Piston | 4 |
| Boyer David A | Lees Summit | MO | N5633D | Beech F33A | Piston | 4 |
| Carroll Aviation | Carroll | IA | N2258M | Piper Pa-28-161 | Piston | 4 |
| Caseys Services Co | Ankeny | IA | N165KC | Piper Pa-31T1 | Turbo | 4 |
| Central Airlines Llc | Wilmington | DE | N113VP | Cessna 560 | Jet | 4 |
| Central Missouri State University | Warrensburg | MO | N460CM | Cessna 172R | Piston | 4 |
| Cessna Aircraft Company | Wichita | KS | N2402Q | Cessna 182T | Piston | 4 |
| Charles Hampton'S A-1 Signs Inc | Dickson | TN | N122SR | Piper Pa 46-350P | Piston | 4 |
| Cns Corp | Kansas City | MO | N50NL | Raytheon Aircraft Company 5 | Piston | 4 |
| Combs Kendall | Hollister | MO | N524BQ | Cessna 182S | Piston | 4 |
| Computer Services Professionals Inc | Jefferson City | MO | N51C | Cessna 560 | Jet | 4 |
| Condado Land Co Llc | Leon | IA | N8707K | Cessna 340A | Piston | 4 |
| Crain Jimmie G | Granbury | TX | N91K | Beech V35B | Piston | 4 |
| Crowe Stephen R | Columbia | MO | N2435M | Piper Pa-28-181 | Piston | 4 |
| Ctb Inc | Goshen | IN | N503CB | Beech C90 | Turbo | 4 |
| Dc Jay Corporation | Sylvania | OH | N1568Y | Beech A36 | Piston | 4 |

| Firm | City | State | Aircraft | Make/Model | Class | Ops |
|-----------------------------------|-----------------|-------|----------|-------------------------|--------|-----|
| Family Video Movie Club Inc | Glenview | IL | N815D | Beech 300 | Turbo | 4 |
| Freeman Jet Llc | Topeka | KS | N799GK | Beech C90 | Turbo | 4 |
| Gilliand Daniel J | Medfield | MA | N131CC | Piper Pa-32R-301 | Piston | 4 |
| Honeywell International Inc | Olathe | KS | N7BX | Beech E-55 | Piston | 4 |
| Husted John | Olathe | KS | N6751C | Beech 58 | Piston | 4 |
| Kansas Air Center Topeka Inc | Topeka | KS | N223KM | Beech 58 | Piston | 4 |
| Lightning Ranch Acquisitions Llc | Midland | MI | N387LR | Cirrus Design Corp Sr22 | Piston | 4 |
| Maly-Kansas Investments Llc | Columbia | MO | N443MC | Piper Pa-31-350 | Piston | 4 |
| Mcvean Aviation Of North Carolina | Memphis | TN | N901MT | Piper Pa-42-1000 | Turbo | 4 |
| Mickelson Properties Llc | Littleton | CO | N777PK | Piper Pa-31P | Piston | 4 |
| Missouri State Highway Patrol | Jefferson City | MO | N2MP | Beech A200 | Turbo | 4 |
| Mitchell Flying Club Inc | Lees Summit | MO | N346K | Cessna 172R | Piston | 4 |
| Otter Tail Power Company | Fergus Falls | MN | N300TP | Beech B200 | Turbo | 4 |
| Papa Golf Aviation Llc | Owasso | OK | N20VL | Cessna 525 | Jet | 4 |
| Patterson John T | Fulton | MO | N732GX | Cessna T210L | Piston | 4 |
| Peterson Daniel R | Omaha | NE | N234EB | Beech V35 | Piston | 4 |
| Phil Lepage Aviation | Lees Summit | MO | N93344 | Cessna T210L | Piston | 4 |
| Reele Hot Inc | Evansville | IN | N545W | Cessna 210L | Piston | 4 |
| Registration Pending | Winona | MN | N116DG | Beech B100 | Turbo | 4 |
| Reliance Air Llc | Conway | AR | N100V | Beech C90 | Turbo | 4 |
| Spirit Wing Aviation Ltd | Guthrie | OK | N7463Y | Piper Pa-30 | Piston | 4 |
| Sunset Cove Associates Llc | Saint Louis | MO | N847 | Piper Pa-31-325 | Piston | 4 |
| Tridle Robert D | Bloomington | IL | N130K | Piper Pa-32Rt-300 | Piston | 4 |
| Turbo Travel Llc | Dover | DE | N67TG | Piper Pa 46-350P | Piston | 4 |
| Wade Aviation | Saint Joseph | MO | N85EC | Beech A36 | Jet | 4 |
| | | | N550HW | | Jet | 4 |
| 182 Inc | Wilmington | DE | N7903M | Beech 35-C33A | Piston | 3 |
| Aeromedical Service Inc | Topeka | KS | N119SK | Cessna 414A | Piston | 3 |
| Airborne Scientific Inc | Overland Park | KS | N159RS | Piper Pa-23-250 | Piston | 3 |
| Attack Jack Enterprises Llc | Wilmington | DE | N820PJ | Piper Pa-28R-200 | Piston | 3 |
| Barrett Aviation Services Inc | Cropwell | AL | N182KR | Cessna 182 | Piston | 3 |
| Bc Lincoln Properties Llc | Lees Summit | MO | N379MA | Cessna 182S | Piston | 3 |
| Berry Thomas Lee | Sun City | AZ | N7360S | Cessna 182P | Piston | 3 |
| Brandtonies Properties Llc | Leawood | KS | N53467 | Piper Pa-28R-201 | Piston | 3 |
| Central Missouri State University | Warrensburg | MO | N464CM | Cessna 172R | Piston | 3 |
| Chavis Daniel | Kansas City | MO | N737CG | Cessna 172N | Piston | 3 |
| Collinson Daniel S | Lees Summit | MO | N28PB | Cessna 182P | Piston | 3 |
| Diamond Leasing Inc | Afton | OK | N70DS | Beech F33A | Piston | 3 |
| Fleming James D | Kansas City | MO | N5791V | Beech A23A | Piston | 3 |
| Freeman Holdings Aircraft Llc | Topeka | KS | N501BE | Cessna 501 | Jet | 3 |
| Jefferson City Aviation Inc Db | Jefferson City | MO | N3281K | Beech 58 | Piston | 3 |
| Johnson'S Farm Produce Inc | Hobart | IN | N182CW | Cessna R182 | Piston | 3 |
| Kcn Aero Club Inc | Kansas City | MO | N825MD | Cessna 182J | Piston | 3 |
| Lorenz George W | Downers Grove | IL | N3530X | Mooney M20F | Piston | 3 |
| Maco Management Co Inc | Clarkton | MO | N1188V | Piper Pa-31-350 | Piston | 3 |
| Mapes Peter B | Bethesda | MD | N1925Y | Mooney M20D | Piston | 3 |
| Mortgage Investment Trust Corp | Prairie Village | KS | N346K | Cessna 172R | Piston | 3 |
| Owen Kevin R Trustee | Laurie | MO | N84368 | Piper Pa-32R-301T | Piston | 3 |
| Registration Pending | Winona | MN | N3689N | Beech 58P | Piston | 3 |
| Runyan Ronald D | Raytown | MO | N52158 | Cessna 180J | Piston | 3 |
| Sunderland Talbert B | Lees Summit | MO | N1822Y | Cessna 172C | Piston | 3 |
| Universal Avn Inc | La Cygne | KS | N9298W | Piper Pa-28-235 | Piston | 3 |
| | | | N777PK | | Piston | 3 |
| 210 Travel Inc | Topeka | KS | N8455D | Piper Pa-32R-301T | Piston | 2 |
| A & H Aircraft Sales Inc | Wilmington | DE | N59MA | Cessna 501 | Jet | 2 |
| Aero Charter Inc | Chesterfield | MO | N650AC | Beech 58 | Piston | 2 |
| Air Enterprises Llc | Middleton | WI | N379MA | Cessna 182S | Piston | 2 |
| Aircraft Management Services Corp | Wilmington | DE | N3522G | Cessna 310R | Piston | 2 |
| Aircraft Services Group Lc | Searcy | AR | N919AG | Beech B90 | Turbo | 2 |
| Archer Iii Llc | West Des Moines | IA | N724PC | Piper Pa-32R-301T | Piston | 2 |
| Atd Flight Systems Llc | Kansas City | MO | N680TC | Piper Pa-44-180 | Piston | 2 |
| Automotive Dealer Corp | Northfield | MN | N33JR | Piper Pa-31-350 | Piston | 2 |
| Aztec Flyers Llc | Gaithersburg | MD | N867DC | Piper Pa-23-250 | Piston | 2 |

| Firm | City | State | Aircraft | Make/Model | Class | Ops |
|---|------------------|-------|----------|-------------------------------|--------|-----|
| B & B Wings Inc | Brooten | MN | N8144Y | Piper Pa-32-300 | Piston | 2 |
| B And N Aviation Inc | Rogers | AR | N97JK | Cessna 414A | Piston | 2 |
| Ba Transportation Inc | Colonial Heights | VA | N7209C | Beech 58 | Piston | 2 |
| Baird Robert A | Perry | IA | N32196 | Piper Pa-28R-200 | Piston | 2 |
| Bank of America NA (c/o United Amer. In | Mckinney | TX | N901GW | Cessna 525 | Jet | 2 |
| Bar Holding Llc | Scottsdale | AZ | N5369J | Piper Pa32-301Xtc | Piston | 2 |
| Baron Charter Service Llc | Oklahoma City | OK | N406RL | Raytheon Aircraft Company C: | Turbo | 2 |
| Bates Wayne L | Mesa | AZ | N7844U | Cessna 172F | Piston | 2 |
| Beard Karen J | Bellevue | NE | N6213V | Consolidated Aeronautics Inc. | Piston | 2 |
| Beckman Vicki C | Belle Vernon | PA | N58VB | Beech 58P | Piston | 2 |
| Beech Employees Flying Club Inc | Wichita | KS | N7252T | Beech A36 | Piston | 2 |
| Bennett David S | Kansas City | MO | N310FA | Cessna 310R | Piston | 2 |
| Berry Companies Inc | Wichita | KS | N829BC | Socata Tbm 700 | Turbo | 2 |
| Board Of Governors | Warrensburg | MO | N4971V | Cessna 172Rg | Piston | 2 |
| Board Of Trustees | Fayetteville | AR | N89UA | Beech B200 | Turbo | 2 |
| Bonanza A36 Llc | Wildwood | MO | N145TS | Raytheon Aircraft Company A: | Piston | 2 |
| Boomerang Llc | Bonner Springs | KS | N135FB | Beech 58 | Piston | 2 |
| Brazos Fuertes Llc | Naples | FL | N414ES | Cessna 414 | Piston | 2 |
| Brookings Aerosports Unlimited Inc | Brookings | SD | N11969 | American General Acft Corp A | Piston | 2 |
| Brown Richard L | Tyler | TX | N8636K | Cessna 340A | Piston | 2 |
| Business Aircraft Leasing Inc | Springfield | IL | N56JM | Piper Pa-28Rt-201 | Piston | 2 |
| Business Flyers Group Inc | Dublin | OH | N221TB | Piper Pa-46-310P | Piston | 2 |
| C Squared Inc | Stevensville | MD | N2134S | Cessna R182 | Piston | 2 |
| C W Parker Aviation Llc | Pinehurst | NC | N533P | Beech B200 | Turbo | 2 |
| Callaway Air Llc | Fulton | MO | N82JM | Cessna 421C | Piston | 2 |
| Central Bank | Lebanon | MO | N711CC | Beech C90 | Turbo | 2 |
| Chailland James W | Fulton | MO | N7449V | Mooney M20F | Piston | 2 |
| Challenge Tool & Manufacturing Inc | New Haven | IN | N695CT | Gulfstream Am Corp Comm D | Piston | 2 |
| Chalmers Aviation Llc | Neosho | MO | N8414M | Piper Pa-28-181 | Piston | 2 |
| Chandler Aviation Corp | Ashland | OH | N139CS | Piper Pa-31T | Turbo | 2 |
| Charman Llc | Wilmington | DE | N1319E | Cessna 182R | Piston | 2 |
| Chipperfield Aircraft Llc | Saint Louis | MO | N2306E | Raytheon Aircraft Company A: | Piston | 2 |
| Choice Products Usa | Eau Claire | WI | N79JF | Cessna 421C | Piston | 2 |
| C-H-S Inc | Pryor | OK | N999MD | Cessna T210L | Piston | 2 |
| Clinicair Llc | Lincoln | NE | N987BH | Cessna 208B | Piston | 2 |
| Cns Ventures Llc | Wilmington | DE | N6589W | Maule M-7-235C | Piston | 2 |
| Cobb F L | Macomb | IL | N827TS | Beech 58 | Piston | 2 |
| Compass Aviation Llc | Long Grove | IL | N1970 | Cirrus Design Corp Sr22 | Piston | 2 |
| Conk James G | Smyrna | DE | N7534W | Piper Pa-28-180 | Piston | 2 |
| Conlee Kenneth T | Lees Summit | MO | N269BA | Beech J35 | Piston | 2 |
| Coyote Aviation Llc | Fayetteville | AR | N521RT | Lancair Company Lc41-550Fg | Piston | 2 |
| Cygnus Inc | Sioux Falls | SD | N23583 | Beech V35B | Piston | 2 |
| Destin Airways Llc | Conway | AR | N308RH | Beech 200 | Turbo | 2 |
| Dewane Investments Llc | Glendale | AZ | N6335F | Beech F90 | Turbo | 2 |
| Durham Co | Lebanon | MO | N3084K | Beech 300 | Turbo | 2 |
| Dxp Holdings Inc | Houston | TX | N177LA | Beech B200 | Turbo | 2 |
| E90 Llc | Mesa | AZ | N282TC | Beech E-90 | Turbo | 2 |
| East Coast Transportation Inc | Randolph | NY | N771KT | Pilatus Pc-12/45 | Piston | 2 |
| Echo One Investments Inc | Cedar Lake | IN | N421CT | Cessna 421B | Piston | 2 |
| Educational Testing Consultants Inc | Saint Louis | MO | N6391P | Piper Pa-24-250 | Piston | 2 |
| Eichelberger Corp | Sugar Land | TX | N113AF | Piper Pa-32R-301T | Piston | 2 |
| Elliott Aviation Flight Services Inc | Moline | IL | N1817S | Beech 58 | Piston | 2 |
| Ericson Galen E | Blue Springs | MO | N7921K | Beech S35 | Piston | 2 |
| Eubanks Carol | Lake Quivira | KS | N74S | Cessna T337G | Piston | 2 |
| Executive Airshare Corp | Wichita | KS | N275BT | Raytheon Aircraft Company B: | Turbo | 2 |
| Executive Airshare Corp | Wichita | KS | N299AS | Raytheon Aircraft Company B: | Turbo | 2 |
| Executive Airshare Corp | Wichita | KS | N446AS | Raytheon Aircraft Company C: | Turbo | 2 |
| Flexaviation Llc | Roanoke | TX | N102KW | Cirrus Design Corp Sr22 | Piston | 2 |
| Flight Enterprises Inc | Houston | TX | N42P | Beech B-55 | Piston | 2 |
| Flymac Llc | Wilmington | DE | N8263E | Piper Pa-32-301T | Piston | 2 |
| Flyover Company Llc | Scotts | MI | N117MM | Cessna 177 | Piston | 2 |
| Foster Hospitality Group Llc | Springfield | MO | N982SB | Raytheon Aircraft Company C: | Turbo | 2 |
| Fremont Llc | Springfield | MO | N990CB | Beech C90 | Turbo | 2 |

| Firm | City | State | Aircraft | Make/Model | Class | Ops |
|---|-----------------|-------|----------|-----------------------------|--------|-----|
| Friendship Harbor Church | Trinity | TX | N9154N | Mooney M20M | Piston | 2 |
| Geysen Hendrik Mario | Charlottesville | VA | N1053L | Mooney M20R | Piston | 2 |
| Gospel Ministeries International Inc | Ooltewah | TN | N8585Y | Piper Pa-30 | Piston | 2 |
| Gutter Pro Usa Llc | Hickory | NC | N8294B | Beech 58 | Piston | 2 |
| Gw Aviation Llc | Little Rock | AR | N23631 | Cessna 182S | Piston | 2 |
| Hampton Clark W Trustee | Saint Joseph | MO | N654H | Piper Pa-31-350 | Piston | 2 |
| Hanisch Gary E | Walsenburg | CO | N8387Y | Piper Pa-30 | Piston | 2 |
| Harpazo Llc | Wichita | KS | N7744Q | Cessna 310Q | Piston | 2 |
| Heart Of America Management Co | Moline | IL | N4488L | Beech C90A | Turbo | 2 |
| Heartland Ltd (c/o Larry Qualls) | Wilmington | DE | N421LQ | Cessna 421C | Piston | 2 |
| Highlands Helicopter Services Inc | Daytona Beach | FL | N7BE | Beech 58 | Piston | 2 |
| Holmes Aviation Llc | Des Moines | IA | N200WZ | Beech 200 | Turbo | 2 |
| Holt Gerald P | Cuba City | WI | N2520Q | Cessna 182K | Piston | 2 |
| In Touch Photographic Inc | Grandview | MO | N21434 | Mooney M20R | Piston | 2 |
| Isewey Flying Club Inc | Kalamazoo | MI | N37KC | Cessna 337D | Piston | 2 |
| Jad Aviation Inc | Bloomington | IL | N373LP | Cessna 425 | Turbo | 2 |
| Jakes Aviation Inc | Henderson | NV | N6043G | Cirrus Design Corp Sr22 | Piston | 2 |
| James R Vannoy & Sons Construction Co | Jefferson | NC | N224JV | Raytheon Aircraft Company C | Turbo | 2 |
| Jauch Robert J | Lyndonville | VT | N9DW | Beech V35B | Piston | 2 |
| Jc Plane Llc | Junction City | KS | N4695N | Cessna 414A | Piston | 2 |
| Jpmd Inc | Lubbock | TX | N7493N | Beech D55 | Piston | 2 |
| Jt Leasing Enterprises Llc | Bloomington | IN | N202JT | Cirrus Design Corp Sr22 | Piston | 2 |
| Justice Bedding Co Inc | Lebanon | MO | N957JF | Beech C90 | Turbo | 2 |
| K Transit Llc | Springfield | MO | N441PJ | Cessna 441 | Turbo | 2 |
| Kelly Douglas E | Newmark | MO | N6829W | Beech B36Tc | Piston | 2 |
| Kelly Kristofor | Newport News | VA | N211KB | Mooney M20F | Piston | 2 |
| Ken Air Aviation Llc | Bristol | VA | N2016K | Beech 95-B55 (T42A) | Piston | 2 |
| Kestrel Inc (c/o Madison Chemical/Kestrel | Madison | IN | N215MC | Cessna 208B | Piston | 2 |
| King Air Ventures Llc | Little Rock | AR | N1660W | Beech 200 | Turbo | 2 |
| Kmc Leasing Inc | Spirit Lake | IA | N455LG | Piper Pa46-500Tp | Piston | 2 |
| L & G Aviation Inc | Fort Dodge | IA | N8424A | Piper Pa-32R-301T | Piston | 2 |
| Lawson David L | Brunswick | GA | N2925D | Piper Pa-28-181 | Piston | 2 |
| Lee Aero Llc | Wichita | KS | N441LA | Cessna 441 | Turbo | 2 |
| Loach James A | La Fayette | GA | N8658M | Beech P35 | Piston | 2 |
| Loronix Information Systems Inc | Durango | CO | N75LW | Beech E-90 | Turbo | 2 |
| Lowman Jonathan S | Douglasville | GA | N877CD | Cirrus Design Corp Sr22 | Piston | 2 |
| Lowrance Kenneth D | Saint Louis | MO | N7681F | Piper Pa-34-200T | Piston | 2 |
| Lyddon Aero Center Inc | Liberal | KS | N210LF | Cessna P210N | Piston | 2 |
| M J Bravo Inc | Wichita | KS | N53WW | Raytheon Aircraft Company A | Piston | 2 |
| Margo Investments Llc | Mitchell | SD | N4360M | Piper Pa-34-220T | Piston | 2 |
| Mark S Coberly Partnership | Gove | KS | N6290N | Cessna 340A | Piston | 2 |
| Maxs Aviation Inc | Springdale | AR | N1137M | Cessna 210M | Piston | 2 |
| Mayse Transportation Llc | Aurora | MO | N534MA | Piper Pa-34-220T | Piston | 2 |
| Mb Aviation Corp | Fairfield | OH | N376MB | Learjet Inc 31A | Jet | 2 |
| Mcabee Construction Inc | Tuscaloosa | AL | N6788R | Cessna 402C | Piston | 2 |
| Medical Imaging Consultants Inc | Lavista | NE | N200NB | Piper Pa-31T | Turbo | 2 |
| Midwest Theatres Corp Db | Minneapolis | MN | N50457 | Cessna 177Rg | Piston | 2 |
| Miller Richard K | Dallas | TX | N35597 | Piper Pa-34-200T | Piston | 2 |
| Miller William Russell | Galloway | OH | N8WM | Beech A36 | Piston | 2 |
| Mkc Aviation Services Llc | Lewes | DE | N100MR | Beech 95-B55 (T42A) | Piston | 2 |
| Mockingbird Aviation | Linn Creek | MO | N58844 | Cessna 182P | Piston | 2 |
| Monroe City Aviators Llc | Monroe City | MO | N5317D | Cessna 172N | Piston | 2 |
| Murray Richard C Jr | Larkspur | CO | N4786L | Piper Pa-28-180 | Piston | 2 |
| N1549K Lc | Sarasota | FL | N1549K | Beech A36 | Piston | 2 |
| N525MI Llc | Las Vegas | NV | N525ML | Cessna 525 | Jet | 2 |
| N58Ge Llc | Cedar Springs | MI | N58GE | Beech 58 | Piston | 2 |
| N635Rm Inc | Raymond | KS | N635RM | Beech S35 | Piston | 2 |
| Navajo Partners Llc | Jonesboro | AR | N445FM | Piper Pa-31-325 | Piston | 2 |
| Ncc Aero Llc | Wilmington | DE | N579NC | Piper Pa-34-220T | Piston | 2 |
| Newair Llc | Newport | AR | N118P | Mitsubishi Mu-2B-35 | Turbo | 2 |
| Newco Leasing Llc | West Bend | WI | N94VP | Cessna 560 | Jet | 2 |
| North Star Aviation | Mountain Home | AR | N69RS | Piper Pa-28Rt-201T | Piston | 2 |
| Number One For Great Veneers Llc | Wilmington | DE | N14GV | Piper Pa46-500Tp | Piston | 2 |

| Firm | City | State | Aircraft | Make/Model | Class | Ops |
|--|---------------|-------|----------|-----------------------------|--------|-----|
| Ohio State University (c/o Department Of | Columbus | OH | N5150U | Cessna 172Rg | Piston | 2 |
| Orange Grove Management Co Llc | Orange Grove | TX | N154LS | Cirrus Design Corp Sr22 | Piston | 2 |
| Parrott Aviation Inc | Marshall | TX | N421KG | Cessna 421C | Piston | 2 |
| Parsons Mitchell Wilson Satterfield | Dexter | MO | N335PC | Cessna 335 | Piston | 2 |
| Perkin Holding Company Inc | Rocky Mount | MO | N5319K | Piper Pa46-500Tp | Piston | 2 |
| Peterson Aviation Inc | Davenport | IA | N478SC | Beech 95-B55 (T42A) | Piston | 2 |
| Pfh Aviation Inc | Kirksville | MO | N1165X | Piper Pa-32-300 | Piston | 2 |
| Potter James R | Springfield | IL | N6108S | Beech A36 | Piston | 2 |
| Power Quality Associates Inc | Mt Olive | IL | N11BX | Beech F33A | Piston | 2 |
| R H K Of Kansas Inc | Topeka | KS | N901TS | Raytheon Aircraft Company C | Turbo | 2 |
| Refshauge Richard | Waterloo | IA | N206MG | Cessna U206G | Piston | 2 |
| Registration Pending | Winona | MN | N1140L | Mooney M20J | Piston | 2 |
| Registration Pending | Winona | MN | N66845 | Beech 95-B55 (T42A) | Piston | 2 |
| Registration Pending | Winona | MN | N7266M | Cessna 182S | Piston | 2 |
| Registration Pending | Winona | MN | N799GK | Beech C90 | Turbo | 2 |
| Reliance Aviation Llc | Mendon | NY | N902NS | Cessna 172P | Piston | 2 |
| Renner Paul Eric | Parkville | MO | N8573W | Piper Pa-28-235 | Piston | 2 |
| Ring Container Technologies Inc | Oakland | TN | N7RC | Beech 300 | Turbo | 2 |
| Rls Rental Co Db | Joplin | MO | N3049R | Piper Pa-28R-200 | Piston | 2 |
| Robinson John Robert | Winder | GA | N1737B | Beech V35B | Piston | 2 |
| Rogers Kenneth A | Oklahoma City | OK | N52KA | Beech E-90 | Turbo | 2 |
| Rolf Randolph K | Vero Beach | FL | N62913 | Beech 58 | Piston | 2 |
| Roznovsky Michael | The Colony | TX | N2695U | Cessna 414A | Piston | 2 |
| Sale Reported | Webster City | IA | N4851F | Piper Pa-32R-300 | Piston | 2 |
| Schumacher Fire Equipment Inc | Washington | MO | N100MG | Cessna 421B | Piston | 2 |
| Semitool Inc | Kalispell | MT | N129TB | Gulfstream Am Corp Comm D | Turbo | 2 |
| Shelter Enterprises Llc | Columbia | MO | N945SH | Raytheon Aircraft Company B | Turbo | 2 |
| Skys The Limit - If Anyone Wants To Sell | Omaha | NE | N450KC | Piper Pa-31-350 | Piston | 2 |
| Skyventure Aviation Of Arkansas Inc | Jonesboro | AR | N620SV | Beech 95 | Piston | 2 |
| Solaero Aviation Inc | Union | MO | N1233F | Cessna 182P | Piston | 2 |
| Span Tech Inc | Glasgow | KY | N66634 | Beech 95-B55 (T42A) | Piston | 2 |
| State Of Wisconsin | Madison | WI | N58AR | Beech 58 | Piston | 2 |
| Storm Flying Service Inc | Webster City | IA | N38773 | Piper Pa-28R-201 | Piston | 2 |
| Sunbridge Capital Inc | Mission | KS | N3648B | Piper Aerostar 602P | Piston | 2 |
| T L Irrigation | Hastings | NE | N30813 | Beech A36 | Piston | 2 |
| Tannehill David A | Sartell | MN | N2942T | Piper Pa-28-181 | Piston | 2 |
| Tanner Aero Llc | Tulsa | OK | N8511 | Cirrus Design Corp Sr22 | Piston | 2 |
| Taylor William G | Sioux Falls | SD | N35504 | Cessna 177Rg | Piston | 2 |
| Technology Aviation Services Llc | Covington | GA | N57039 | Mooney M20J | Piston | 2 |
| Thompson John Stuart | Dallas | TX | N903V | Beech A36 | Piston | 2 |
| Tjm Equipment Leasing Llc | Harmony | PA | N608SA | Cessna T206H | Piston | 2 |
| Tomato Express Inc | Lexington | KY | N744JD | Aero Commander 690A | Turbo | 2 |
| Twc Aircraft Llc | Willmar | MN | N91902 | Piper Pa 46-350P | Piston | 2 |
| Us Bancorp Equipment Finance Inc | Portland | OR | N423TM | Cessna 421C | Piston | 2 |
| Van Rosendale Robert A | South Holland | IL | N286D | Beech 95-B55 | Piston | 2 |
| Volker David P | Palm City | FL | N934T | Beech 35-33 | Piston | 2 |
| W A S S Aviation Llc | St Robert | MO | N1107W | Raytheon Aircraft Company C | Turbo | 2 |
| West Bend Air Inc | West Bend | WI | N9247Y | Piper Pa-31-310 | Piston | 2 |
| West Texas Executive Leasing Inc | San Angelo | TX | N400PS | Mitsubishi Mu-2B-40 | Turbo | 2 |
| Wolcott Jason M Db | Manhattan | KS | N6326Q | Mooney M20C | Piston | 2 |
| Wptd Inc (c/o Karen Ness) | Munster | IN | N71320 | Cessna 182M | Piston | 2 |
| X-Press Charter Service Inc | Longview | TX | N590SA | Beech B90 | Turbo | 2 |
| Younger Connie R | Madrid | IA | N41271 | Piper Pa-28-180 | Piston | 2 |
| | | | N521SG | | Piston | 2 |
| | | | N613MM | | Piston | 2 |
| | | | N732CD | | Piston | 2 |
| | | | N7363Q | Cessna 182P | Piston | 1 |
| 565Vv Ltd | Union Hill | IL | N565VV | Cessna 551 | Jet | 1 |
| Acor David | Jackson | TN | N4UY | Piper Pa-31-350 | Piston | 1 |
| Ahh Hoo Ltd | Wilmington | DE | N45US | Beech F33A | Piston | 1 |
| Allen Equipment Leasing Llc | Midland | MI | N410SA | Cessna 172S | Piston | 1 |
| Beck Mark C Trustee | Ashland | MO | N131JD | Cessna 172N | Piston | 1 |
| Bergmoser Thomas A | Lincoln Park | MI | N737LV | Cessna 172N | Piston | 1 |

| Firm | City | State | Aircraft | Make/Model | Class | Ops |
|---|--------------------|-------|----------|------------------------------|--------|-----|
| Bertram Kurt L | Lees Summit | MO | N71PM | Piper Pa-28-140 | Piston | 1 |
| Board Of Regents | Warrensburg | MO | N107CM | Beech 76 | Piston | 1 |
| Brainerd Helicopter Service Inc | Brainerd | MN | N237S | Beech S35 | Piston | 1 |
| Brent Loseke Colt Co Inc | Gainesville | TX | N8056G | Cessna 177Rg | Piston | 1 |
| Buerge Alden D DbA | Joplin | MO | N818JC | Beech 58 | Piston | 1 |
| C C Medflight Inc | Wilmington | DE | N399RP | Mitsubishi Mu-300 | Jet | 1 |
| Central Airlines Inc | Fairway | KS | N917GT | Aero Commander 500-B | Piston | 1 |
| Central Missouri State University | Warrensburg | MO | N463CM | Cessna 172R | Piston | 1 |
| Central Missouri State University | Warrensburg | MO | N466CM | Cessna 172R | Piston | 1 |
| Central Missouri State University | Warrensburg | MO | N467CM | Cessna 172R | Piston | 1 |
| Central Missouri State University | Warrensburg | MO | N6AM | Beech 76 | Piston | 1 |
| Central States Industrial Equipment & Ser | Springfield | MO | N9259V | Piper Pa-32R-301 | Piston | 1 |
| Cheyenne Aircraft Llc | Wilmington | DE | N809E | Piper Pa-42-720 | Turbo | 1 |
| Cimarron Holdings Llc | Moore | OK | N50FB | Cessna 421C | Piston | 1 |
| Citation Ii Llc | Dover | DE | N888XL | Cessna 550 | Jet | 1 |
| Crane Gary L | Fennville | MI | N172TC | Cessna 172M | Piston | 1 |
| Crotts Aircraft Service Inc | Dodge City | KS | N500CT | Cessna 340A | Piston | 1 |
| Delvin Contractors Inc | Topeka | KS | N9991Y | Cessna T210N | Piston | 1 |
| Dickerson Stephen R | Kansas City | MO | N9289Q | Beech V35B | Piston | 1 |
| Doug Harris Aviation Llc | Tulsa | OK | N15A | Beech 95-C55 | Piston | 1 |
| Dpl Leasing Inc | Wilmington | DE | N286CM | Piper Pa-46-310P | Piston | 1 |
| Duininck Brothers & Gilchrist | Mn 56281 | | N531DB | Mooney M20J | Piston | 1 |
| Dycom Industries Inc | Palm Beach Gardens | FL | N876C | Gates Learjet Corp. 35A | Jet | 1 |
| Excel Service Solutions Inc | Butler | PA | N96JB | Piper Pa-32-300 | Piston | 1 |
| Executive Beechcraft Inc | Kansas City | MO | N28TM | Beech C90 | Turbo | 1 |
| Forrest Dale E | Tulsa | OK | N39HW | Mooney M20R | Jet | 1 |
| Gaitskill John T | Park Forest | IL | N46219 | Cessna 172I | Piston | 1 |
| Garmin International Inc | Olathe | KS | N1129S | Raytheon Aircraft Company 58 | Piston | 1 |
| Gerigs Trucking & Leasing Inc | Fort Wayne | IN | N299LG | Mooney M20R | Jet | 1 |
| Giltner Mathew D | Whitehouse Station | NJ | N6665R | Mooney M20C | Piston | 1 |
| Grant William M | Bolivar | MO | N20834 | Cessna 172M | Piston | 1 |
| Groundhog Inc | Waukesha | WI | N2731T | Beech V35 | Piston | 1 |
| Gwin Jeff | Enid | OK | N94255 | Cessna 210L | Piston | 1 |
| Haskin Marshall M | Bates City | MO | N96764 | Cessna 182Q | Piston | 1 |
| High Air Inc | Wilmington | DE | N75TF | Piper Pa-31T | Turbo | 1 |
| Hill Brothers Construction Co Inc | Falkner | MS | N837HB | Piper Pa-23-250 | Piston | 1 |
| Hiller Kevin Eugene | Springfield | MO | N4589X | Piper Pa-28-181 | Piston | 1 |
| Industrial Specialty Products Inc | Barnhart | MO | N7570Y | Cessna R182 | Piston | 1 |
| Jackson Thomas R Jr | Kingsville | TX | N6841L | Grumman American Avn. Corp | Piston | 1 |
| Jgd Equipment Leasing Llc | Gibsonia | PA | N729JS | Cirrus Design Corp Sr22 | Piston | 1 |
| J-Tom Inc | Lincoln | NE | N6134P | Piper Pa-24-250 | Piston | 1 |
| K C N Aero Club Inc | Kansas City | MO | N49696 | Cessna 152 | Piston | 1 |
| Kabo Aviation Llc | Lexington | KY | N779MA | Piper Pa 46-350P | Piston | 1 |
| Keller Companies Inc | Manchester | NH | N108KC | Dassault-Breguet Falcon 10 | Jet | 1 |
| Key City Flyers Inc | Dubuque | IA | N21489 | Piper Pa-28-181 | Piston | 1 |
| Kidi Inc | Cabool | MO | N112RL | Cessna 421C | Piston | 1 |
| Lakeshore Four Llc | Osage Beach | MO | N232FJ | Cirrus Design Corp Sr22 | Piston | 1 |
| Langaire Llc | Springfield | MO | N235SM | Beech 58 | Piston | 1 |
| Lauderdale Thomas J | Lees Summit | MO | N236JP | Beech A36 | Piston | 1 |
| Leavenworth Excavating & Equipment Cc | Leavenworth | KS | N353ES | Cessna 425 | Turbo | 1 |
| Lyddon Aero Center Inc | Liberal | KS | N2224G | Piper Pa-34-200T | Piston | 1 |
| Magic Aviation Llc | Ankeny | IA | N111NW | Piper Pa-32R-300 | Piston | 1 |
| Mark E Farnham Llc | Wilmington | DE | N628SF | Raytheon Aircraft Company 58 | Piston | 1 |
| Med Care Inc | Grand Island | NE | N52HC | Beech 58P | Piston | 1 |
| Medical Informatics Engineering Inc | Fort Wayne | IN | N123BA | Cessna 414A | Piston | 1 |
| Mg Air Transport Llc | Newport | NC | N700EV | Socata Tbm 700 | Turbo | 1 |
| Midwest Aviation Inc | West Paducah | KY | N841TW | Beech A36 | Piston | 1 |
| Murphye & Associates Inc | Blue Springs | MO | N9088D | Piper Pa-28-161 | Piston | 1 |
| N131Pc Llc | Springfield | MO | N131PC | Piper Pa-31T | Turbo | 1 |
| Ne Arkansas Aviation Inc | Walnut Ridge | AR | N906FL | Beech S35 | Piston | 1 |
| Olah Enterprises Inc | Kansas City | MO | N310FB | Cessna 310R | Piston | 1 |
| Orion Systems Inc | Eau Claire | WI | N3101Y | Cessna 182E | Piston | 1 |
| Osaga Inc | Olathe | KS | N914RC | Piper Pa-34-220T | Piston | 1 |

| Firm | City | State | Aircraft | Make/Model | Class | Ops |
|-------------------------------|-----------------|-------|----------|--------------------------------|--------|-----|
| Pa28Fly Llc | Fort Collins | CO | N41987 | Piper Pa-28R-200 | Piston | 1 |
| Patterson Aviation Llc | Omaha | NE | N200RS | Beech B200 | Turbo | 1 |
| Petrol Properties Inc | Springfield | MO | N766JW | Beech B-60 | Piston | 1 |
| Pierson & Windle Dds Pa | Wichita | KS | N7718A | Piper Pa-23-250 | Piston | 1 |
| Pinnacle Leasing Inc | Overland Park | KS | N9368Y | Beech N35 | Piston | 1 |
| Premier Auto Outlet Inc | Rogersville | MO | N8359M | Piper Pa-32-301T | Piston | 1 |
| R&R Pilots Inc | Kansas City | MO | N56598 | Piper Pa-28R-200 | Piston | 1 |
| Reynolds John M Cpa Pc | Rogersville | MO | N8952C | Piper Pa-32-260 | Piston | 1 |
| Roganti Francis S | Clayton | NC | N39880 | Bellanca 17-30A | Piston | 1 |
| Rowe Michael D | Leawood | KS | N93350 | Cessna T210L | Piston | 1 |
| Rowell Gustaf D | Kansas City | MO | N8192G | Cessna 182P | Piston | 1 |
| S & K Acquisitions Llc | Chesterfield | MO | N578KS | Diamond Aircraft Ind Inc Da 40 | Jet | 1 |
| Schardt Donovan D | Bayfield | CO | N1040T | Beech 95-A55 | Piston | 1 |
| Semanco International Ltd | Charlotte | NC | N620DR | Aero Commander 500-B | Piston | 1 |
| Smith & Chambers Llc | Fort Scott | KS | N7HU | Piper Pa-30 | Piston | 1 |
| Smith John | Springfield | MO | N3625C | Cessna R182 | Piston | 1 |
| Spangler William L Co-Trustee | Winters | CA | N2182H | Mooney M20R | Piston | 1 |
| St Charles Flying Service Inc | St Charles | MO | N4598F | Piper Pa-28-181 | Piston | 1 |
| St Charles Flying Service Inc | St Charles | MO | N55256 | Cessna 172P | Piston | 1 |
| Stick & Rudder Club Inc | Waukegan | IL | N5232K | Cessna 172P | Piston | 1 |
| Sunbelt Finance Inc | Wilmington | DE | N90CJ | Cessna 525A | Jet | 1 |
| Tca Leasing Inc | Wilmington | DE | N134RG | Mitsubishi Mu-300 | Jet | 1 |
| Thirty Four November Llc | Columbus | OH | N1851H | Piper Pa-28-140 | Piston | 1 |
| Tilton William T | Springfield | VA | N56928 | Mooney M20J | Piston | 1 |
| Tristate Aviation Llc | Kirkville | MO | N1165X | Piper Pa-32-300 | Piston | 1 |
| Us Aviation & Marine Llc | Parkville | MO | N21173 | Cessna 172S | Piston | 1 |
| Watkins James R | Arlington | TX | N235LW | Piper Pa-28-235 | Jet | 1 |
| Welch Charles L | Raytown | MO | N953T | Beech N35 | Piston | 1 |
| Western Air Maps Inc | Shawnee Mission | KS | N7139C | Piper Pa-31-310 | Piston | 1 |
| Westosha Flying Club Inc | Wilmot | WI | N632SP | Cessna 172S | Piston | 1 |
| Williams Jarvis E | Kansas City | MO | N7084T | Cessna 172 | Piston | 1 |
| Wozniak Martin | Grapevine | TX | N75BA | Piper Pa-30 | Piston | 1 |
| | | | N645SA | | Jet | 1 |

Monett

| Firm | City | State | Aircraft | Make/Model | Class | Ops |
|--|------------------|-------|----------|----------------------|--------|-----|
| Jack Henry & Associates Inc | Monett | MO | N152JH | Cessna 560 | Jet | 336 |
| Jack Henry & Associates Inc | Monett | MO | N157JH | Cessna 560 | Jet | 319 |
| Jack Henry & Associates Inc | Monett | MO | N154JH | Cessna 560 | Jet | 300 |
| Jack Henry & Associates Inc | Monett | MO | N156JH | Cessna 560 | Jet | 275 |
| Jack Henry & Associates Inc | Monett | MO | N198JH | Cessna 525 | Jet | 214 |
| Jack Henry & Associates Inc | Monett | MO | N155JH | Cessna 560 | Jet | 206 |
| MS Flying Inc | Monett | MO | N191JH | Beech A36 | Piston | 176 |
| JKS Llc | Wilmington | DE | N545EC | Learjet Inc 45 | Jet | 106 |
| TMS Holding Corp | Wilmington | DE | N1529L | Beech F33A | Piston | 27 |
| Grayson-Madison Inc | Wilmington | DE | N6537C | Piper Pa-34-200T | Piston | 22 |
| TSMT Marketing Co | Joplin | MO | N550SJ | Cessna S550 | Jet | 16 |
| Tecumseh Products | Tecumseh | MI | N552TP | Raytheon Aircraft Co | Turbo | 14 |
| Tecumseh Products | Tecumseh | MI | N551TP | Raytheon Aircraft Co | Turbo | 14 |
| Jrs Aviation Llc | Carthage | MO | N477B | Cessna 441 | Turbo | 11 |
| Overflowing Cup Ministries International Inc | Conroe | TX | N5WJ | Piper Pa-31P | Piston | 9 |
| Pittman Aviation Llc | Monett | MO | N7256H | Cessna 182S | Piston | 9 |
| Wells David L | Lafayette | IN | N205BF | Mooney M20R | Piston | 9 |
| CWP Aviation Llc | Tulsa | OK | N36CV | Raytheon Aircraft Co | Piston | 8 |
| Four Kings Air Llc | Montello | WI | N200CJ | Beech 200 | Turbo | 8 |
| Flightster Llc | Irving | TX | N737GS | Cessna 172N | Piston | 7 |
| Marco Aviation Services Inc | Neosho | MO | N1529L | Beech F33A | Piston | 7 |
| Mooney Airplane Company Inc | Kerrville | TX | N205BF | Mooney M20R | Jet | 7 |
| Rogers Don D | Galena | MO | N74WB | Grumman American | Piston | 7 |
| T & S Inc | Overland Park | KS | N5925V | Piper Pa-34-200T | Piston | 7 |
| Ellis Steven A | Springfield | MO | N1026U | Mooney Aircraft Corp | Piston | 6 |
| Lennon David S | Waxhaw | NC | N181KC | Piper Pa-32R-301T | Piston | 6 |
| Unknown | ??? | ?? | N610NK | ??? | Piston | 6 |
| Averett James H | Harper | TX | N617Q | Beech J35 | Piston | 5 |
| Bonanza Llc | Greenville | SC | N2327A | Raytheon Aircraft Co | Piston | 5 |
| Hay George M | Springfield | MO | N666DM | Beech A36 | Piston | 5 |
| Turbo Travel Llc | Dover | DE | N67TG | Piper Pa 46-350P | Piston | 5 |
| Bird Dog Flyers Llc | Wilmington | DE | N9643E | Bellanca 17-31A | Piston | 4 |
| Boyce Billy Jr | Columbia | MO | N200GC | Cessna 340A | Piston | 4 |
| Centurytel Service Group Inc | Monroe | LA | N318CT | Cessna 560 | Jet | 4 |
| First National Bank | Edinburg | TX | N701NB | Cessna 560 | Jet | 4 |
| Furey John P | Malvern | OH | N133JL | Furey John Furey-Rv | Piston | 4 |
| Gasser Richard D | Odessa | TX | N299EC | Swearingen Sa226-T | Turbo | 4 |
| Great Plains Air Freight Llc | Wilmington | DE | N2690T | Cessna 414A | Piston | 4 |
| Holt Equipment Lp | Bolivar | MO | N7323Y | Piper Pa-30 | Piston | 4 |
| Jrs Aviation Llc | Carthage | MO | N616D | Cessna 421B | Piston | 4 |
| KKB Llc | Saint Louis | MO | N1545S | Beech 35-B33 | Piston | 4 |
| Lauren Manufacturing Co | New Philadelphia | OH | N395DR | Piper Pa-42 | Turbo | 4 |
| Marks James R | Rock Falls | IL | N4716D | Cessna 182A | Piston | 4 |
| Mazzio'S Corporation | Tulsa | OK | N61PZ | Beech 58 | Piston | 4 |
| Mccoy M R Jr | Shreveport | LA | N9322G | Cessna 182P | Piston | 4 |
| MJCM Llc DbA | Houston | TX | N297PF | Dassault-Breguet Fa | Jet | 4 |
| NJB Aviation Inc | Mount Vernon | IL | N575JB | Cessna 414A | Piston | 4 |
| Ozark Entertainment Inc | Pasadena | TX | N541MG | Beech 95-C55 | Piston | 4 |
| Sharpline Converting Inc | Wichita | KS | N24LK | Beech A36 | Piston | 4 |
| Story Thomas R | Austin | TX | N7164U | Mooney M20C | Piston | 4 |
| Stover Jasper | Doole | TX | N2194L | Cessna 182T | Piston | 4 |
| Strick Mark J | Springfield | MO | N42623 | Cessna 182L | Piston | 4 |
| Wings Over Illinois Inc | Atlanta | IL | N6316J | Piper Pa-28-180 | Piston | 4 |
| Corporate Roof Management Systems Ltd | Dublin | OH | N715TB | Beech 58Tc | Piston | 3 |
| D W T Inc | Oklahoma City | OK | N501G | Cessna 501 | Jet | 3 |
| DDT Aero Inc | College Station | TX | N9449M | Cessna 210K | Piston | 3 |
| Flying B'S Llc | Wilmington | DE | N525JV | Cessna 525 | Jet | 3 |
| High Times Inc | Bentonville | AR | N441DD | Cessna 441 | Turbo | 3 |
| Kukolich Stephen G | Tucson | AZ | N69729 | Cessna 310Q | Piston | 3 |
| MS Flying Inc | Monett | MO | N3902Q | Cessna 172L | Piston | 3 |
| Sancap Aircraft Inc | Alliance | OH | N2114 | Wsk-Pzl-Mielek M-2C | Piston | 3 |
| Street Danny R | Shell Knob | MO | N4176B | Bellanca 17-30A | Piston | 3 |

| Firm | City | State | Aircraft | Make/Model | Class | Ops |
|---------------------------------------|------------------|-------|----------|------------------------|--------|-----|
| Swank Darrell | Little Rock | AR | N761ZV | Cessna T210M | Piston | 3 |
| Tabor Charles Db | Anderson | SC | N200CT | Mooney M20M | Piston | 3 |
| US Aviation & Marine Llc | Parkville | MO | N21173 | Cessna 172S | Piston | 3 |
| Wolfe Kelly Llc | Springfield | MO | N8377S | Piper Pa-34-220T | Piston | 3 |
| ABC Holdings Llc,Flight Options Llc | Richmond Heights | OH | N862CW | British Aerospace Bz | Jet | 2 |
| Advantage Health Services Llc | Lenexa | KS | N2079X | Piper Pa-32Rt-300T | Piston | 2 |
| Aero Auto Sales And Leasing Inc | Kent | OH | N409ST | Cessna 550 | Jet | 2 |
| AFG Industries Inc | Kingsport | TN | N44FG | Cessna 560 | Jet | 2 |
| Aig Aviation Inc | Atlanta | GA | N8209A | Beech A36 | Piston | 2 |
| Alpha Aviation Inc | Morristown | TN | N310KC | Cessna 310R | Piston | 2 |
| American Jet International Corp | Houston | TX | N135FA | Gates Learjet Corp. | Jet | 2 |
| Azalea Aviation Inc | Mobile | AL | N27177 | Piper Pa-31-350 | Piston | 2 |
| Baird Robert A | Perry | IA | N32196 | Piper Pa-28R-200 | Piston | 2 |
| BHP Aviation Inc | Starkville | MS | N136GB | Beech V35 | Piston | 2 |
| Bihler Richard P | Prior Lake | MN | N5246K | Ryan Navion B | Piston | 2 |
| BJM Aviation Inc | Wilmington | DE | N31841 | Piper Pa-32-300 | Piston | 2 |
| Black Knight Air Inc | Farmington | MO | N2348W | Piper Pa-31T1 | Turbo | 2 |
| Board Of Regents | Warrensburg | MO | N107CM | Beech 76 | Piston | 2 |
| Bockman Ltd | Milford | IA | N5895F | Cessna 210G | Piston | 2 |
| Boman & Kemp Manufacturing Llc | Ogden | UT | N299MK | Beech B200 | Turbo | 2 |
| Briggs Aviation Llc | Wilmington | DE | N1025C | Mooney M20R | Jet | 2 |
| Caterpillar Inc | Peoria | IL | N994CT | Canadair Ltd Cl-600- | Jet | 2 |
| Central Missouri State University | Warrensburg | MO | N212D | Beech 65-A90 | Turbo | 2 |
| Cessna Finance Corp | Wichita | KS | N522CF | Cessna 182T | Piston | 2 |
| Commerce Bank Na | Kansas City | MO | N911CB | Cessna 560 | Jet | 2 |
| DCCM LLC | Markesan | WI | N368CM | Mooney M20R | Piston | 2 |
| Dei Flight Inc | Stoughton | WI | N8146L | Cirrus Design Corp | Piston | 2 |
| Eidson Mark C | Weatherford | TX | N96PT | Beech 58P | Piston | 2 |
| First Insurance Agency Inc | Goodland | KS | N50JP | Cessna 550 | Jet | 2 |
| Frankphil Llc | Houston | TX | N6944V | Mooney M20F | Piston | 2 |
| Fry William A | Saginaw | TX | N1842S | Cessna 414 | Piston | 2 |
| Furr Donald E Jr | Arlington | TN | N109AT | Piper Pa-32-300 | Piston | 2 |
| Gasper Tomas M | Champlin | MN | N9000L | Mooney M20C | Piston | 2 |
| Geddes Gordon H | Poplar Grove | IL | N4312M | Piper Pa-32-301 | Piston | 2 |
| Global Aerospace Inc | Short Hills | NJ | N241GA | Beech F33A | Piston | 2 |
| Health Systems Inc | Sikeston | MO | N702JL | Beech B100 | Turbo | 2 |
| Honeycutt Joseph W | Statesville | NC | N1567G | Beech C90A | Turbo | 2 |
| Itaa Services Llc | Pella | IA | N26LM | Beech 76 | Piston | 2 |
| J & T Implements Llc | Lenexa | KS | N137JT | Piper Pa-31T | Turbo | 2 |
| Jett Aire Florida One Inc | West Palm Beach | FL | N670C | North American Na-2 | Jet | 2 |
| Johnson Edwin L | Shreveport | LA | N9179E | Maule M-5-235C | Piston | 2 |
| Julair Llc | Marshfield | WI | N2344C | Cessna R182 | Piston | 2 |
| K Transit Llc | Springfield | MO | N441PJ | Cessna 441 | Turbo | 2 |
| Kaiser Midwest Inc | Marble Hill | MO | N376KC | Pilatus Pc-12/45 | Piston | 2 |
| KCK Services Llc | Sioux City | IA | N691SM | Rockwell International | Turbo | 2 |
| Kirchner Michael W | Hudson | IL | N78194 | Globe Gc-1B | Jet | 2 |
| Lauren International Inc | New Philadelphia | OH | N2658X | Cessna 421C | Piston | 2 |
| Learjet Inc | Wichita | KS | N245K | Learjet Inc 45 | Jet | 2 |
| Leonard Air Inc | Andover | NJ | N1130U | Cessna 172M | Piston | 2 |
| Loach James A | La Fayette | GA | N8658M | Beech P35 | Piston | 2 |
| Locke Mary | Sherman | TX | N6073S | Beech A36 | Piston | 2 |
| Mac-Tech Inc | Wellington | KS | N8940 | Cessna 525A | Jet | 2 |
| Mann Ralph D | Marble Falls | TX | N6812U | Mooney M20C | Piston | 2 |
| Maranatha Leasing Co | Green Bay | WI | N5VK | Cirrus Design Corp | Piston | 2 |
| Marco Aviation Services Inc | Neosho | MO | N657SP | Cessna 172S | Piston | 2 |
| Mariposa Group Llc | Salina | KS | N12JD | Pilatus Pc-12/45 | Piston | 2 |
| Marshall And Ilsley Bank | Milwaukee | WI | N775M | Cessna 650 | Jet | 2 |
| Mcelmurry Joe A | Munford | TN | N2025W | Beech 95-C55 | Piston | 2 |
| Missouri Highway & Transportation Dpt | Jefferson City | MO | N9921H | Cessna 182R | Piston | 2 |
| Mouse Adam L | Bolivar | MO | N220BD | Mooney M20C | Piston | 2 |
| Northington Neill | Rosharon | TX | N522G | Beech 95 | Piston | 2 |
| Parker Gregory S | Swisher | IA | N742D | Beech D35 | Piston | 2 |
| Phillips Aviation Enterprises Inc | Granby | CO | N2389S | Cessna Tr182 | Piston | 2 |
| Registration Pending | Huntington | IN | N66845 | Beech 95-B55 (T42A) | Piston | 2 |

| Firm | City | State | Aircraft | Make/Model | Class | Ops |
|---|--------------------|-------|----------|----------------------|--------|-----|
| Roberts James B | Charlotte Hall | MD | N14782 | Bellanca 17-30A | Piston | 2 |
| Schwab Coyle P | St Charles | IL | N3457V | Cessna 195 | Piston | 2 |
| Smalley Jeffrey W | Boone | IA | N42776 | Cessna 421B | Piston | 2 |
| Startled Bear Aviation Inc | Wilmington | DE | N2285S | Cessna R182 | Piston | 2 |
| State Of Missouri | Jefferson City | MO | N100SM | Raytheon Aircraft Co | Turbo | 2 |
| State Of Missouri | Jefferson City | MO | N128VT | Beech B200 | Turbo | 2 |
| Stephens Group Inc | Little Rock | AR | N1838S | Cessna 560XI | Jet | 2 |
| T & T Inc | Bossier City | LA | N71077 | Cessna 182M | Piston | 2 |
| Wain David M | Hermitage | TN | N9783L | Beech C23 | Piston | 2 |
| Zylks Donald | Portland | TX | N157SM | Cessna 182S | Piston | 2 |
| Aerotech Of Louisville Inc | Louisville | KY | N88JE | Smith Aerostar 601P | Piston | 1 |
| Ahh Hoo Ltd | Wilmington | DE | N45US | Beech F33A | Piston | 1 |
| American Aviation Inc | Wilmington | DE | N31841 | Piper Pa-32-300 | Piston | 1 |
| Angel Aviation Llc | Springfield | MO | N6LH | Cessna 421B | Piston | 1 |
| Associates Inc | Marion | IL | N755GS | Cirrus Design Corp | Piston | 1 |
| Bailey & Sons | Grenada | MS | N699CB | Cessna 182T | Piston | 1 |
| Bonanza Wings Inc | Inver Grove Height | MN | N340Q | Beech J35 | Piston | 1 |
| Cassada Jack H | White Bear Lake | MN | N84K | Beech V35B | Piston | 1 |
| Central Bank | Lebanon | MO | N711CC | Beech C90 | Turbo | 1 |
| Chalmers Aviation Llc | Neosho | MO | N8414M | Piper Pa-28-181 | Piston | 1 |
| Custom Fabric & Repair Inc | Marshfield | WI | N98AT | Piper Pa-31T | Turbo | 1 |
| Darair Llc | Marshall | MN | N711HG | Piper Pa-31-350 | Piston | 1 |
| Dennison Patrick A | Crete | NE | N7652J | Piper Pa-28R-180 | Piston | 1 |
| Double H Enterprises Llc | Springfield | MO | N3350Q | Piper Pa-34-200T | Piston | 1 |
| Ewald Nancy J | Seguin | TX | N4466S | Beech V35B | Piston | 1 |
| Fayard Enterprises Inc | Louisburg | NC | N433CA | Construcciones Aero | Turbo | 1 |
| Fitzgerald William J | Lubbock | TX | N9394M | Mooney M20F | Piston | 1 |
| Fleet National Bank (C/O Joe Morten & Sons, Inc.) | South Sioux City | NE | N901GW | Cessna 525 | Jet | 1 |
| Flocks Tom | Bonita Springs | FL | N89PD | Beech A36 | Piston | 1 |
| Fogel Paul | Camano Island | WA | N52JH | Shea Pitts Special S | Jet | 1 |
| Frankenberg Raymond H | Washington | MO | N101AX | Beech B-60 | Piston | 1 |
| General Council Of The Assemblies Of God | Springfield | MO | N777AJ | Beech B200 | Turbo | 1 |
| Harben Grover S Iii | Gainesville | GA | N53520 | Cessna 337G | Piston | 1 |
| Harris William M | Radford | VA | N887PM | Piper Pa-39 | Piston | 1 |
| Highfill Randall W | Wichita Falls | TX | N2559W | Mooney M20C | Jet | 1 |
| Hodges Air Llc | Tucson | AZ | N835P | Raytheon Aircraft Co | Piston | 1 |
| Howard Donald V | Austin | TX | N66AC | Bellanca 17-30A | Piston | 1 |
| JBW Enterprises Inc | Springfield | MO | N8377S | Piper Pa-34-220T | Piston | 1 |
| L L Express Llc | Wilmington | DE | N12WT | Cessna 421B | Piston | 1 |
| Lang Elmer N | Lohn | TX | N96KC | Piper Pa-32R-301 | Piston | 1 |
| Marsh David J | Hillsboro | KS | N78286 | Cessna 172K | Piston | 1 |
| Mccarthy John P | Lutz | FL | N6534C | Piper Pa-28R-201T | Piston | 1 |
| Mccullough E Wesley | Kansas City | MO | N2818F | Cessna 182J | Piston | 1 |
| Mcgahan Michael E | Kent | WA | N5715M | Cessna 310P | Piston | 1 |
| Mills Mike E | Ponca | AR | N1274S | Cessna 182P | Piston | 1 |
| Mountain Air Llc | Midway | AR | N35J | Beech J35 | Piston | 1 |
| Myers Steven L | Lake Oswego | OR | N3078B | Beech F33A | Piston | 1 |
| Northwest Arkansas Aircraft Leasing Llp | Rogers | AR | N5286A | Cessna 172S | Piston | 1 |
| Okiamo Of Joplin Llc | Joplin | MO | N2888G | Piper Pa-28-236 | Piston | 1 |
| Price Richard L | Phoenix | AZ | N34841 | Callair A | Piston | 1 |
| Registration Pending | Huntington | IN | N9251P | Piper Pa-24-260 | Piston | 1 |
| Remington Products Co | Wadsworth | OH | N955RA | Beech F90 | Turbo | 1 |
| Reyher Enterprises Inc | Mcclave | CO | N421HR | Cessna 421B | Piston | 1 |
| Sale Reported | San Antonio | TX | N54JH | Boeing E75 | Jet | 1 |
| Slusher Slavatore | Chesterfield | MO | N3870V | Cessna R172K | Piston | 1 |
| Smith Duane E | Fair Grove | MO | N42531 | Cessna 182L | Piston | 1 |
| Spencer Howard M | Joplin | MO | N38440 | Piper Pa-28R-201T | Piston | 1 |
| State Central Savings Bank | Keokuk | IA | N210WA | Cessna 337D | Piston | 1 |
| Three Three Foxtrot Inc | Denver | IA | N201FC | Mooney M20J | Piston | 1 |
| Turning Final Llc | Greeley | CO | N5168A | Cessna T210N | Piston | 1 |
| United States Air Force, Attn J Eric Treland, | San Antonio | TX | N450AF | Cessna 172R | Piston | 1 |
| Williams Donald S Trustee | Rogers | AR | N29DC | Beech S35 | Piston | 1 |
| Wings & Whirlybirds Inc | Boynton Beach | FL | N33270 | Cessna 177Rg | Piston | 1 |

Appendix D:
Airport Survey

Missouri Airport Business Users and Needs Survey

Monett

Capital improvements at GA airports can help existing firms survive and or expand, as well as attract new firms or industry. Each airport in Missouri serves a different area with unique requirements. The purpose of this survey is to help assess: (1.) how airport capital improvements can help facilitate economic development in the airport service area; and (2.) identify the specific airport projects required to do so.

This survey is a first step in a local input process that will include a Consultant visit to the airport, and meetings with local community and/or business leaders. These visits will follow-up and expand upon the following survey. This survey addresses the following:

1. General industry-related airport use by purpose
2. Specific local and external firms that use the airport
3. Capital improvement needs – business user perspective
4. Concerned community/business leaders

We would like to receive your response prior to our visit of the airport and its service region. So, please complete the enclosed survey by **April 21** and fax to **(803) 251-2922**.

1. Industry Purpose – Business-related use of airports covers a broad spectrum from tourism to manufacturing to institutional. Please identify how your airport currently serves the community in terms of aircraft operations by type and frequency of business activity (please check where appropriate). Also, please indicate the perceived future potential (i.e., 10-years) of the airport if all critical infrastructure requirements were in place.

| Type of Activity | Current Use | | | Future Potential | | |
|----------------------------|-------------|--------|--------|------------------|--------|--------|
| | Daily | Weekly | Seldom | Daily | Weekly | Seldom |
| Tourism | | | | | | |
| Convention | | | | | | |
| Manufacturing | | | | | | |
| Other Business | | | | | | |
| Institutional | | | | | | |
| Other (please list below) | | | | | | |
| | | | | | | |
| | | | | | | |

2. Major Business Users – Industry data sources were mined to obtain available information on firms that use the airport. This includes both local and external firms who fly people and/or cargo. Please review the list below for Monett and add any additional firms you know who regularly use the airport (i.e. over 10 operations annually). An exhaustive list is not required, rather just identify major/principle/key users. Also, if individual users represent firms that use the airport for business purposes, please provide the firm name.

| Firm | Registered Location | | Aircraft Data | | | Annual Oper |
|-------------------------|---------------------|-------|---------------|------------------|--------|----------------|
| | City | State | Tail # | Make/Model | Class | |
| Jack Henry & Assoc. Inc | Monett | MO | N152JH | Cessna 560 | Jet | 336 |
| | | | N157JH | Cessna 560 | Jet | 319 |
| | | | N154JH | Cessna 560 | Jet | 300 |
| | | | N156JH | Cessna 560 | Jet | 275 |
| | | | N198JH | Cessna 525 | Jet | 214 |
| | | | N155JH | Cessna 560 | Jet | 206 |
| MS Flying Inc | Monett | MO | N191JH | Beech A36 | Piston | 176 |
| JKS Llc | Wilmington | DE | N545EC | Learjet Inc 45 | Jet | 106 |
| TMS Holding Corp | Wilmington | DE | N1529L | Beech F33A | Piston | 27 |
| Grayson-Madison Inc | Wilmington | DE | N6537C | Piper Pa-34-200T | Piston | 22 |
| Tecumseh Products | Tecumseh | MI | N552TP | Raytheon B300 | Turbo | 14 |
| | | | N551TP | Raytheon B300 | Turbo | 14 |
| TSMT Marketing Co | Joplin | MO | N550SJ | Cessna S550 | Jet | 14 |
| | | | N550SJ | Cessna S550 | Jet | 2 |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |

3. Capital Improvement Needs – The table below summarizes current and future capital improvement projects. Given the current and potential business-use of your airport, please consider how these projects address business-aviation user needs, and the resulting effect on local economic development. Specifically, are you aware of new industry of firms that would either locate or expand operations in the area upon completion of these projects? Similarly, would any of these projects generate additional tourist or convention oriented aircraft operations?

Please respond by checking the appropriate boxes after each project, per the description below:

- **Significant** – Would definitely result in expansion of current business activity or attraction of new industry.
- **Modest** – Would result in increased use, but specific expansion/new industry is not expected.
- **Low** – Might result in some increased activity but specific expansion/new industry is doubtful.
- **None** – No effect on economic development.

| Monett | Estimated Cost | Econ. Dvlpmt. Effect | | | |
|--------------------------------|--------------------|----------------------|--------|-----|------|
| | | Sign. | Modest | Low | None |
| 5-Year | | | | | |
| T-Hangar Pavement Maintenance | \$107,700 | | | | |
| Taxiway Pavement Maintenance | \$65,700 | | | | |
| Improve Airport Drainage | \$56,300 | | | | |
| Install Perimeter Fencing | \$118,500 | | | | |
| Construct Hangar Taxiway | \$200,000 | | | | |
| Install Lighted Wind Indicator | \$22,500 | | | | |
| 20-Year | | | | | |
| Land Acquisition | \$500,000 | | | | |
| Crackfill Runway 18-36 | \$441,600 | | | | |
| Crackfill Runway 18-36 Taxiway | \$377,500 | | | | |
| Total Development Costs | \$1,889,800 | | | | |

For those projects anticipated to yield a “significant” or “modest” chance of attracting new industry, please explain which new industry(s) might be attracted, or which existing businesses might expand.

4. Key Community/Business Leaders – The Consultant will visit the airport and its community for a day next week. Given the nature of the survey and the short visit, please provide the name and contact information of community and/or business leaders that are familiar with the airport and its potential role in supporting the region’s economic development.

| <u>Organization/Firm Name</u> | <u>Contact Person</u> | <u>Phone</u> |
|-------------------------------|-----------------------|--------------|
|-------------------------------|-----------------------|--------------|

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