

Economic Impact of Montana Airports

Executive Summary

2026



MONTANA
Department of Transportation

ZENITH ECONOMICS

Montana Airports Economic Impact Study

Jobs
39,400

Payroll
$2.4 Billion

Economic Impact
$6.5 Billion

Fiscal Revenue
$328 Million

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Source: Montana Statewide Economic Impact of Airports

Introduction

Montana's airport system is a critical component of the state's transportation and economic infrastructure, enabling connectivity across a large and geographically dispersed landscape. Through scheduled commercial service and general aviation activity, airports provide access between Montana communities and regional, national, and international markets, supporting passenger travel, freight movement, and time-sensitive operations that cannot be efficiently served by surface transportation alone. From tourism and healthcare to wildfire response and natural resources, air connectivity underpins the industries Montana depends on most.

Beyond mobility, Montana's airports support a broad range of economic activity that contributes to employment, income generation, and business operations throughout the state. Aviation-related enterprises, on-airport and nearby businesses, visitor spending associated with air travel, and ongoing investment in airport facilities collectively generate economic activity at the local, regional, and statewide levels. These effects extend across multiple sectors, including tourism, healthcare, construction, professional services, and natural resource industries.

To document both the economic contributions and broader community functions of the state's aviation system, the Montana Department of Transportation undertook a comprehensive, statewide evaluation of Montana's airports. The **2026 Montana Statewide Economic Impact of Airports** study examines the full scope of airport-related activity, including aviation and non-aviation businesses, visitor spending, capital investment, and secondary economic effects, while also identifying the specific roles individual airports play in supporting residents, businesses, and critical services across Montana.

Direct Airline Related Spending

- **$2.1B - Commercial Visitors**
- **$1.2B - Airport tenants and related business**
- **$170M - Capital Investments**
- **$143M - General Aviation Visitors**
- **$90.3M - airport operations**

Source: Montana Statewide Economic Impact of Airports.

The Geography of Montana Airports

Montana's system of 126 public airports provides air transportation services to communities across one of the nation's largest and most geographically dispersed states. The eight largest primary commercial service airports offer regularly scheduled passenger service connecting Montana to regional, national, and international destinations — and all eight are included in the **2026 Montana Statewide Economic Impact of Aviation** analysis. Non-primary commercial service airports extend that connectivity into smaller communities and are likewise represented in the study.

General aviation airports form the broadest tier of Montana's aviation system, supporting charter operations, agricultural services, emergency response, wildfire suppression, and healthcare access across the state. While Montana is home to 126 public aviation facilities (as illustrated in the map below), the State selected 75 public airports for economic impact research. Not all general aviation airfields met the criteria for inclusion; private facilities and smaller airstrips with non-public use are also excluded from the scope of analysis.

Together, these 75 facilities reach into 51 of Montana's 56 counties — a footprint that reflects both the breadth of Montana's aviation system and the diversity of communities it serves. In 16 counties, such as Gallatin County, multiple airports operate within county boundaries, serving distinct aviation needs within the same region. The five counties without a study airport are captured within a consolidated "Rest of Montana" region, ensuring complete statewide coverage in the analysis.



Source: Montana Statewide Economic Impact of Airports.

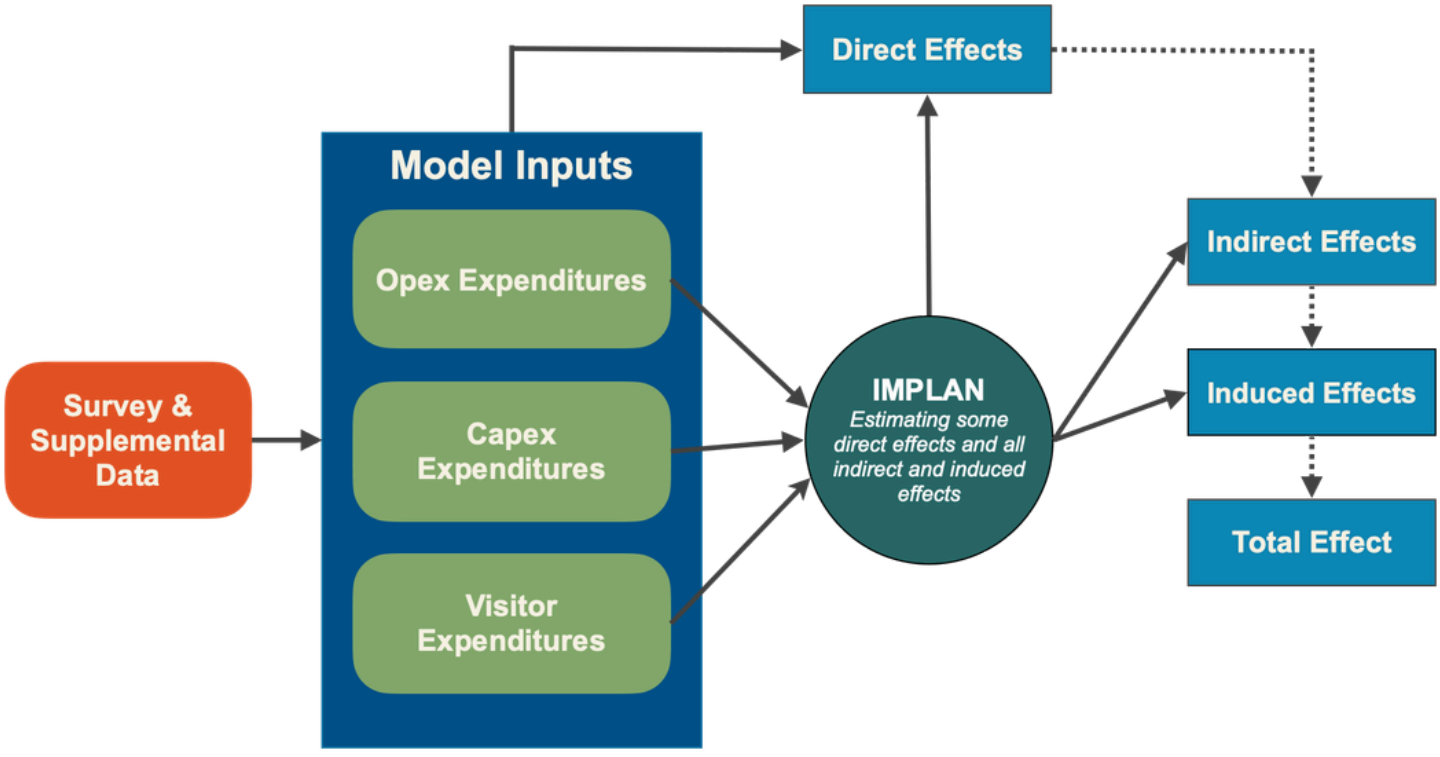
Methodology

The **2026 Montana Statewide Economic Impact Study of Airports** was designed to provide a comprehensive, FAA-compliant assessment of the economic, fiscal, and value-added contributions of Montana's statewide airport system. The analytical approach prioritizes methodological rigor, transparency, and practical applicability, producing results that are defensible for policy decisions, planning purposes, and federal funding applications, while maintaining consistency with prior Montana airport economic impact studies where appropriate.

The analysis is grounded in primary data collected through extensive surveys and interviews with airport managers, on-airport businesses, aviation service providers, and commercial and general aviation passengers. Site visits to a representative sample of airports across the state supplemented survey data with direct operational context. Primary data were validated against secondary sources including the U.S. Census Bureau, Bureau of Labor Statistics, FAA aviation activity databases, and IMPLAN economic datasets.

Economic and fiscal impacts were estimated using IMPLAN input-output modeling software, the industry-standard platform for airport economic impact analysis. The model quantified direct, indirect, and induced effects associated with airport operations, on-airport businesses, visitor spending, and capital investment. Multi-regional modeling techniques were applied where appropriate to account for Montana's unique inter-county commuting and trade patterns, improving accuracy and avoiding double counting.

Beyond traditional economic metrics, the study assessed qualitative contributions of aviation including emergency response, wildfire suppression, agricultural support, and business connectivity. All assumptions, data sources, and methodological decisions are fully documented to ensure transparency and long-term replicability.



Source: Montana Statewide Economic Impact of Airports.

Statewide Summary of Impacts

Montana's public airports collectively support an estimated **$6.49 billion** in total economic output and **39,439 jobs** statewide. Value added — the measure of net contribution to Montana's gross state product — totals an estimated **$3.63 billion**, reflecting the depth of aviation's integration into the state economy beyond direct airport activity. Together, these figures position Montana's airport system among the state's most significant economic assets, generating a scale of output comparable to major industry sectors while simultaneously supporting the transportation infrastructure on which those sectors depend.

Impact Type	Employment (Annual, 000s)	Labor Income ($M)	Value Added ($M)	Output ($M)	State & Local Taxes ($M)
Direct	25	1,461	2,134	3,746	209
Indirect	7.3	471	706	1,443	55
Induced	7.2	421	785	1,297	63
Total	**39.4**	**2,353**	**3,625**	**6,487**	**328**

Qualitative Impacts

In addition to generating substantial economic impacts, Montana airports support a variety of harder to quantify “Qualitative Impacts” that support critical statewide safety and enterprise. The 2026 Montana Statewide Economic Impact of Airports Study documents the following:

Aerial Firefighting

35+ Airports Support Wildland Firefighting Operations.

Police/Law Enforcement

38+ Airports Support Search and Rescue Ops & **28+ Airports** Support additional Police and Emergency Response Ops

Emergency Medical Aviation

42+ Airports Support Air Ambulance Operations

Military Exercise/Training

25+ Airports Used for Military Training and Transit Flights

Corporate/Business Activity

33+ Airports Support Corporate and Business Activity

Agriculture Support

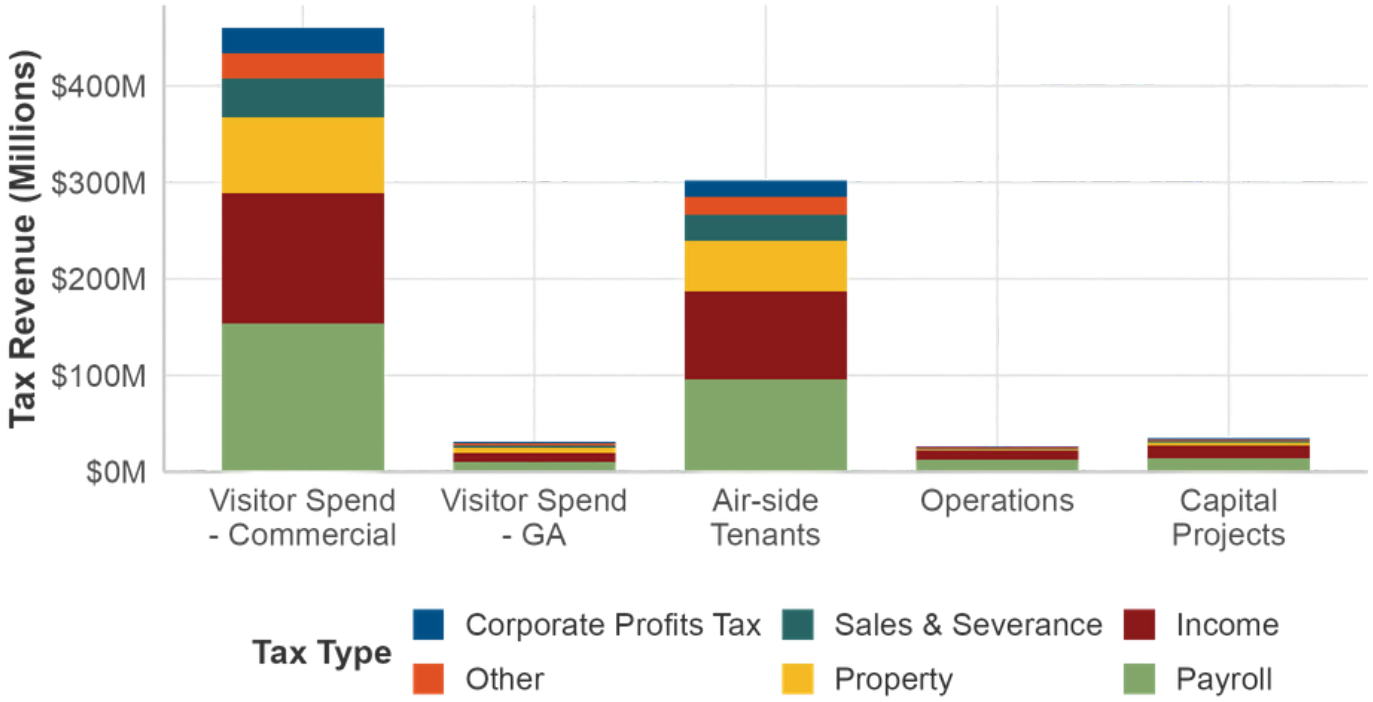
25+ Airports Support Agriculture

Source: Montana Statewide Economic Impact of Airports.

Statewide Summary of Impacts

Tax Revenue by Type and Spending Type

Breakdown of tax categories generated by airport economic activity



Montana's airports generate $855 million in total tax revenue annually (including $328 million for state and local governments), distributed across all levels of government. As illustrated above, visitor spending at commercial airports is the single largest tax-generating activity, producing nearly $450 million — driven primarily by payroll and income taxes as visitor dollars flow into Montana's hospitality, retail, and transportation sectors. Air-side tenant activity contributes an additional $300 million in tax revenue, while general aviation visitor spending, airport operations, and capital projects account for the remainder. Across all spending categories, payroll and income taxes dominate the tax mix, reflecting the labor-intensive nature of aviation-related economic activity.

Source: Montana Statewide Economic Impact of Airports.

Airport-Specific Total Economic Impacts

Airport	Jobs Supported (Annual)	Labor Income ($K)	Value Added ($K)	Output ($K)	State & Local Taxes ($K)
Bozeman Yellowstone Intl	13,402	$808,090	$1,250,554	$2,219,627	$108,418
Missoula	6,850	$418,083	$657,593	$1,154,280	$65,249
Glacier Park Intl	7,693	$412,686	$620,004	$1,123,638	$55,275
Billings Logan Intl	4,585	$265,796	$435,156	$824,034	$43,932
Great Falls Intl	2,810	$164,440	$257,374	$513,801	$29,563
Helena	2,492	$181,581	$262,904	$393,965	$14,689
Yellowstone Intl	490	$40,978	$57,219	$91,006	$3,399
Bert Mooney	336	$19,614	$28,096	$55,006	$2,746
Ennis	133	$6,629	$10,096	$19,851	$842
Kalispell	103	$6,630	$7,642	$11,144	$528
Big Timber	49	$2,978	$4,002	$8,246	$252
Sidney-Richland	37	$2,478	$3,260	$6,176	$216
Three Forks	33	$2,351	$3,244	$5,786	$214
Laurel	40	$2,024	$2,878	$5,662	$235
Ravalli	36	$1,924	$2,708	$5,532	$211



Source: Montana Statewide Economic Impact of Airports.

Airport-Specific Total Economic Impacts Cont.

Airport	Jobs Supported (Annual)	Labor Income ($K)	Value Added ($K)	Output ($K)	State & Local Taxes ($K)
Lewistown	33	$1,555	$2,188	$4,654	$196
Gardiner	20	$1,356	$1,826	$3,517	$109
Stevensville	24	$1,003	$1,461	$3,168	$136
Mission	17	$881	$1,351	$2,674	$110
Dawson	14	$742	$980	$2,412	$73
Polson	19	$691	$1,031	$2,369	$101
Deer Lodge	19	$745	$1,110	$2,364	$124
Wokal	17	$724	$894	$2,336	$79
Conrad	14	$847	$1,121	$2,262	$73
Baker	18	$777	$1,054	$2,005	$85
Dillon	14	$794	$723	$1,848	$85
Havre	17	$989	$1,063	$1,762	$70
Roundup	9	$432	$603	$1,317	$55
Choteau	9	$350	$500	$1,189	$50
Shelby	9	$396	$555	$1,184	$45
Frank Wiley	7	$388	$432	$1,086	$34
Cut Bank Int	6	$260	$372	$850	$28
Harlowton	6	$256	$351	$841	$27
Scobey	4	$135	$201	$803	$19
Thompson Falls	4	$321	$406	$783	$26
Woltermann	5	$212	$264	$666	$20
White Sulphur Springs	4	$204	$272	$617	$19

Source: Montana Statewide Economic Impact of Airports.

Airport-Specific Total Economic Impacts Cont.

Airport	Jobs Supported (Annual)	Labor Income ($K)	Value Added ($K)	Output ($K)	State & Local Taxes ($K)
Bowman	5	$197	$269	$611	$26
Libby	5	$165	$241	$552	$24
Townsend	4	$174	$218	$548	$19
Eureka	4	$174	$240	$514	$19
Poplar	4	$140	$194	$490	$18
Turner	4	$144	$191	$481	$8
Plains	3	$161	$217	$421	$16
Malta	3	$112	$152	$391	$12
Ronan	3	$143	$191	$376	$13
Ruby Valley	5	$155	$212	$375	$14
Big Sky	3	$103	$152	$371	$14
Red Lodge	2	$183	$208	$358	$14
Big Sandy	2	$85	$113	$267	$9
Ft Benton	2	$80	$115	$227	$12
Liberty	2	$61	$75	$198	$6
Tillitt	1	$77	$103	$188	$6
Riddick	1	$28	$43	$182	$3
Mineral	1	$39	$44	$180	$4
Sher-Wood	1	$47	$63	$179	$5
St Ignatius	1	$59	$77	$153	$5
Lincoln	1	$38	$57	$141	$5
Ekalaka	1	$34	$47	$127	$4

Source: Montana Statewide Economic Impact of Airports.

Airport-Specific Total Economic Impacts Cont.

Airport	Jobs Supported (Annual)	Labor Income ($K)	Value Added ($K)	Output ($K)	State & Local Taxes ($K)
Wolf Point	1	$32	$45	$119	$5
Broadus	0	$23	$29	$118	$2
Hot Springs	1	$41	$52	$96	$3
Terry	1	$17	$26	$83	$2
Big Horn	1	$47	$47	$63	$2
Circle	0	$16	$20	$59	$2
Edgar G. Obie	0	$13	$20	$51	$0
Harlem	0	$6	$9	$40	$1
Whitefish	0	$15	$21	$39	$2
Starr Browning	0	$10	$13	$31	$1
Colstrip	0	$7	$11	$29	$1
Stanford/Bigger staff	1	$7	$11	$21	$1
Geraldine	1	$7	$8	$14	$0
Jordan	0	$1	$2	$8	$0
Winnett	0	$0	$0	$2	$0
Troy	0	$0	$1	$1	$0

Source: Montana Statewide Economic Impact of Airports.



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