



OKLAHOMA
Aerospace &
Aeronautics



Aerospace and Defense Industry

Economic Impact Study

ROLLOUT

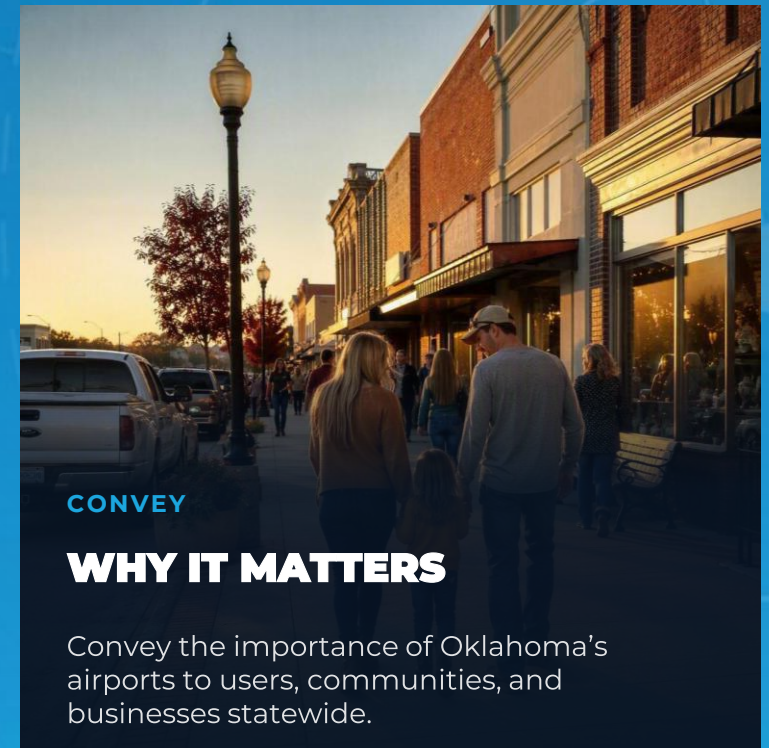
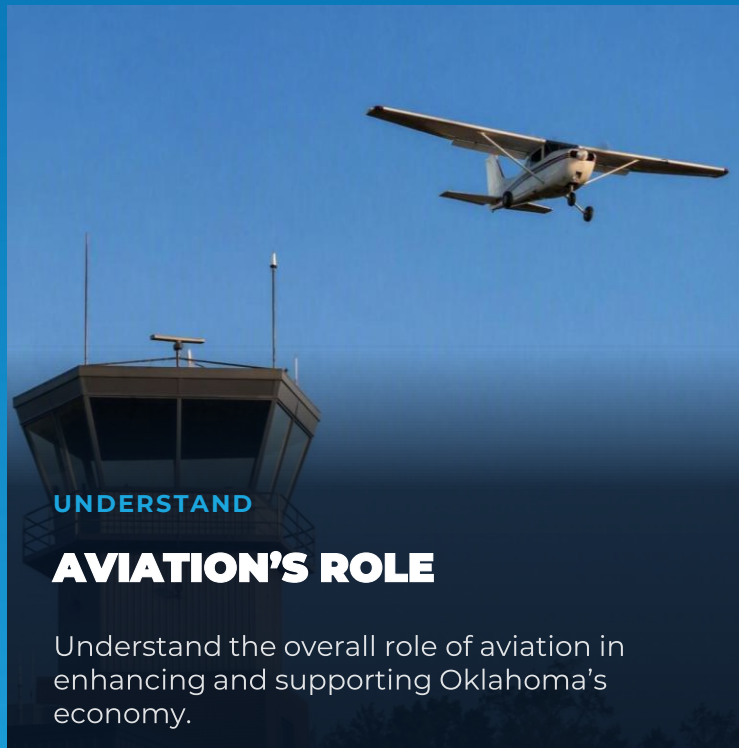
Driving Innovation and Fueling Prosperity in Oklahoma



Economic Impact Overview

STUDY OVERVIEW

PURPOSE OF THE STUDY



STUDY OVERVIEW

AEIS AT A GLANCE



107

AIRPORTS VISITED

Site visits completed at all public-use airports — 4 commercial service and 103 general aviation.



12,688

PASSENGER SURVEYS

Out-of-state passenger responses collected at the 4 commercial service airports, covering 23,323 travelers.



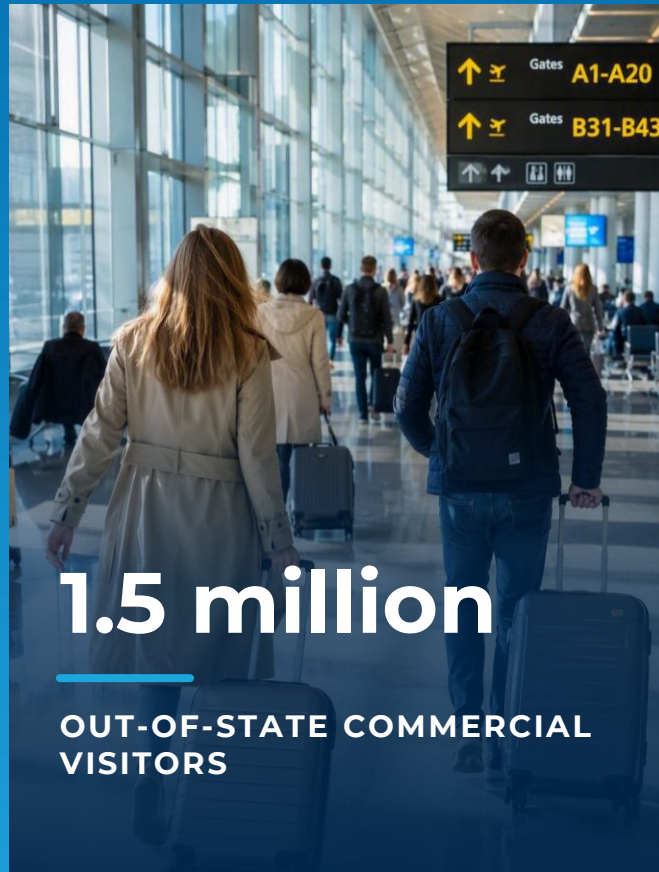
572

TENANTS SURVEYED

On-airport tenants surveyed across all study airports, representing 20,000+ employees.

STATEWIDE FINDINGS

STATE OF THE INDUSTRY



ECONOMIC IMPACT STUDY OVERVIEW

TOTAL ECONOMIC IMPACT

On-Airport Impacts

Airport Administration
(Airport Management Survey)

Business Tenants
(Airport Tenant Survey)

Construction
(Airport Management Survey)

Visitor Spending Impacts

Commercial Service
(Commercial Air Passenger Survey)

General Aviation
(GA Pilot and Passenger Survey)

AIRPORT SPECIFIC

Off-Airport Air Cargo Impacts

Off-Airport Industries that Rely on Air Cargo
(Online Research)

Military Impacts

Department of War and Base Specific Employment
(Base Coordination)

Industry Reliance Impacts

Off-Airport Businesses
(Off-Airport Business Survey)

STATEWIDE

Source: Airport Management Survey

ECONOMIC IMPACT STUDY

IMPACT MEASURES



JOBS

Sum of the full-time and part-time employees working within a defined geography or industry, counted across all employers in that area



PAYROLL

Total compensation paid to employees, including wages, salaries, employer-provided benefits, and taxes paid on behalf of those employees



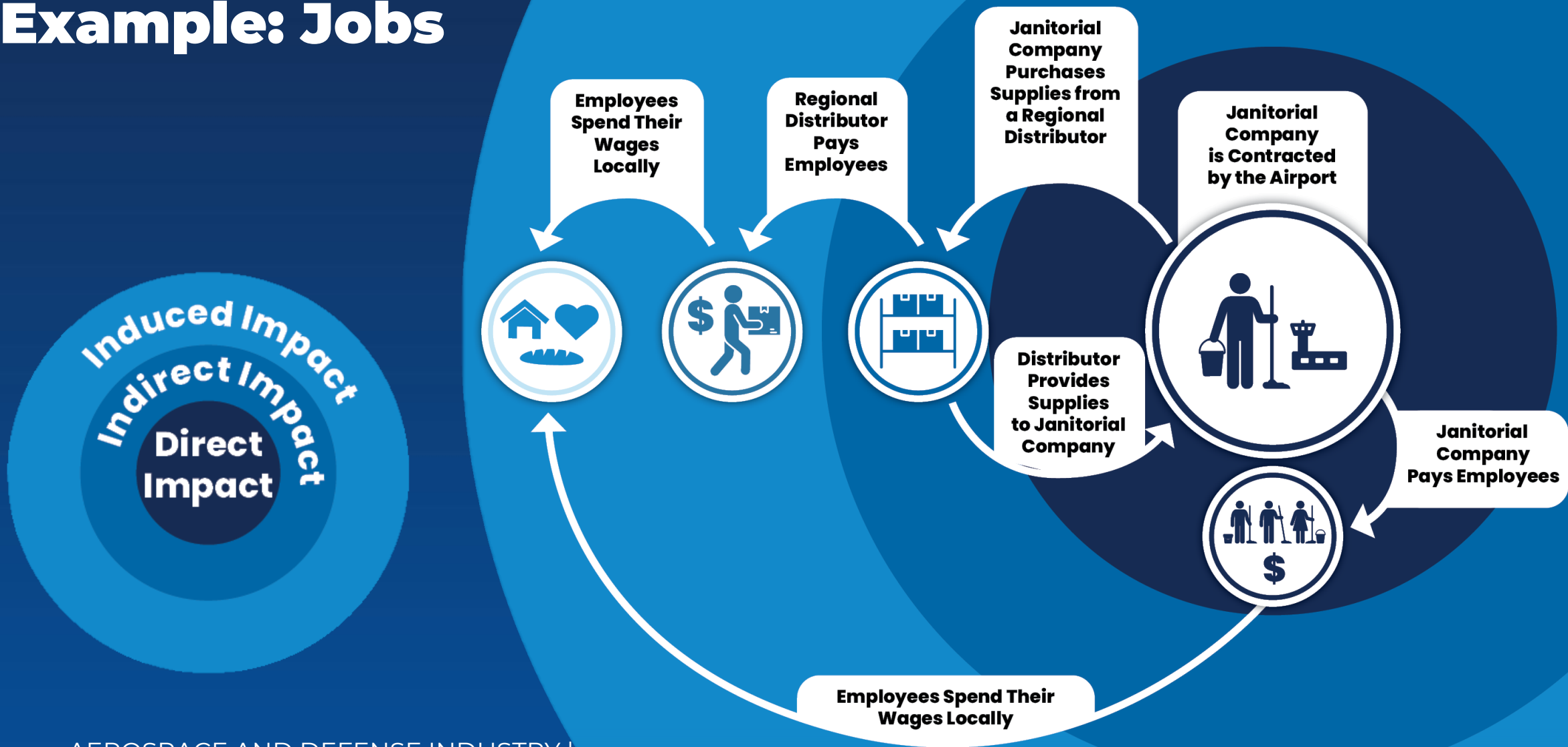
ECONOMIC IMPACT

The value of sales, receipts, and other operating income plus any inventory change; inclusive of all intermediate inputs purchased

ECONOMIC IMPACT STUDY CATEGORIES



Example: Jobs



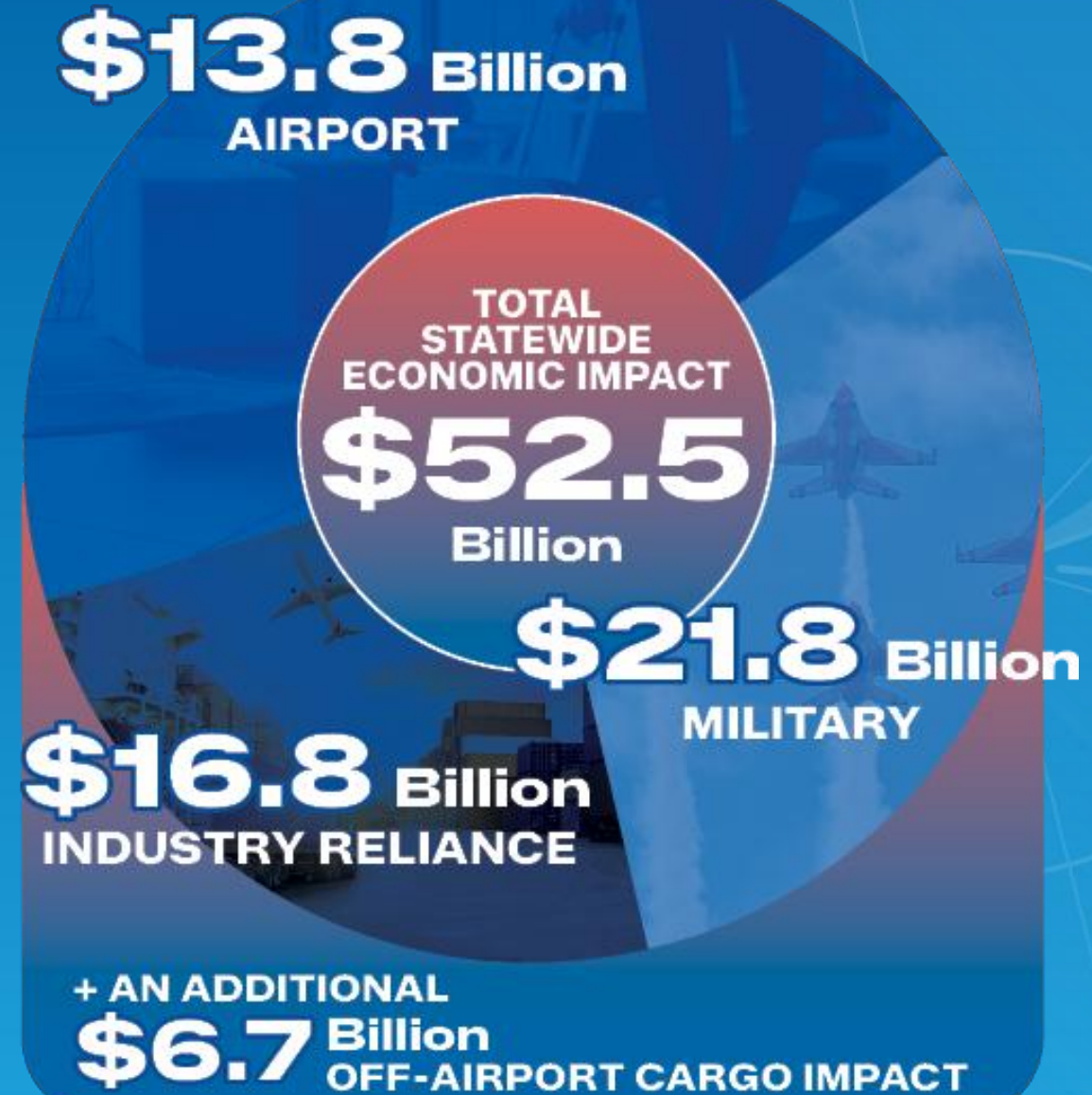


Statewide Findings

STATEWIDE FINDINGS A LOCAL VOICE ON A STATEWIDE ENGINE

“ Our airport is the ‘front door’ to Guthrie for business leaders and visitors alike. Its impact is felt across our entire community—from the sales tax generated at our local shops to the unique holiday traditions like the Santa Fly-In.

Brittany Timmons, CEO and President
Guthrie Chamber of Commerce



OKLAHOMA AIRPORTS ECONOMIC IMPACT

37,700

DIRECT JOBS (AIRPORT AND VISITOR
SPENDING)

SUPPORTING



27,100

ADDITIONAL JOBS SUPPORTED

GENERATING



\$13.8B

TOTAL ECONOMIC IMPACT



Jobs & Payroll

Airports and on-site
tenants employ
thousands of
Oklahomans.



Business Attraction

Reliable air access helps
communities recruit
employers and reach
new markets.



Visitor Spending

Out-of-state air travelers
spend at nearby hotels
and retailers.



Tax Revenue

Airport activity
generates tax revenue
supporting city and
county budgets.

STRENGTHENING NATIONAL DEFENSE

DRIVING ECONOMIC GROWTH

Five installations anchor Oklahoma's defense economy—each a top regional employer.

Vance AFB

4

1

Tinker AFB

Altus AFB

3

2

Fort Sill

5

McAlester AAP

1

\$10.9B

#1 Tinker AFB

2

\$8.8B

#2 Fort Sill

3

\$772M

#3 Altus AFB

4

\$761M

#4 Vance AFB

5

\$622M

#5 McAlester AAP

NATIONAL SECURITY

The state's five military bases are home to **66,000 military and civilian personnel** who play a vital role in the nation's security and defense.



THE BUSINESSES BEHIND OKLAHOMA'S AEROSPACE SUCCESS

Aerospace and defense is a cornerstone of Oklahoma's economy.

A base of companies and skilled workers who depend on the state's airports to operate, connect, and grow.



790

AEROSPACE & RELATED
BUSINESSES

EMPLOY
→

32,000+

AEROSPACE INDUSTRY
EMPLOYEES

SUPPORTING
→

29,000

ADDITIONAL JOBS SUPPORTED

GENERATING
→

\$16.8B

TOTAL ECONOMIC IMPACT



STATEWIDE FINDINGS

FREIGHT & CARGO IMPACTS

Economic impact from off-airport air cargo — measured for the first time in this study.

NEW IN 2026

OFF-AIRPORT AIR
CARGO ACTIVITY

\$6.7 BILLION

STATEWIDE FINDINGS

TOTAL STATEWIDE IMPACTS



JOBS

259,283

IN 2026

2017: 203,346

+55,937



PAYROLL

\$16.6B

IN 2026

2017: \$11.6B

+\$5.0B



ECONOMIC IMPACT

\$52.5B

IN 2026

2017: \$43.5B

+\$9B



Thank you!