

Salina Regional Airport and Airport Industrial Center Economic Impact Study 2025



Prepared For
Salina Airport Authority
Salina, Kansas

By
The Docking Institute of Public Affairs
Fort Hays State University

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Executive Summary

- The total level of economic activity generated by the private businesses, educational institutions, military units, public institutions, and other entities for 2024 was \$1,620,827,040.
- The total employment associated with SLN/AIC and its clients/tenants was 12,376 jobs or 31.1 percent of the employment in Saline County.
- The private businesses located at the SLN/AIC contributed 39.6 percent of the total economic activity for Saline County for 2024 when measured by Output, while providing 21.8 percent of the jobs.
- The educational institutions located in the Salina Airport Authority contributed 0.8 percent of the total economic activity for Saline County for 2024.
- The economic impact of the Kansas National Guard military units located at the SLN/SAIC could not be determined as the data was only available at the State of Kansas level.
- The public institutions and other entities located at the SLN/AIC contributed 205 jobs and approximately 1.0 percent of the total economic activity for Saline County for 2024.

Introduction

This report was produced for the Salina Airport Authority. It focuses on the Salina Regional Airport (SLN) and Airport Industrial Center (AIC) located at what was Schilling Air Force Base and their continuing support of the local Salina and Saline County economy. Approximately 100 enterprises are located at the AIC. SLN supports both commercial and civilian aviation, as well as military operations.

This report is the latest in a series of reports that estimates the economic impacts that are generated by the many entities that utilize either SLN or the AIC.

Data Sources

Data for this report was collected directly from 33 of the 102 enterprises located at the Airport Industrial Center (AIC). For the remaining enterprises, the necessary data was estimated by external data sources. These external data sources included private data sources such as Dun & Bradstreet and Implan®; public sources including company websites and Facebook® pages; and governmental sources such as the County Business Profile (CBP). For all the estimated data, the report used very conservative estimates when there was a range of values from an outside source or between sources. Outside sources of data usually have a time lag associated with collecting and presenting the data. Thus, some of this data is from 2023 rather than 2024. However, the rate of change year-over-year tends to be small.

The use of estimated data (because 68% of tenants did not participate in the survey) results in a slightly smaller economic impact. It may be helpful in future surveys to share this report with those targeted as respondents to future economic impact surveys in the future, so that they can see the level of data aggregation used. For some, believing that firm specific information will be divulged may cause them to hesitate to share economic information, particularly gross sales, for competitive business reasons.

Methods

The purpose of this study is to determine the approximate magnitude of the economic impact of the Salina Regional Airport and Airport Industrial Center (SLN/SAIC) and its 102 tenants (businesses and organizations) on the local economy. This was our third use of a multimode survey consisting of online, mail (physical paper), and telephone (interviews) modes of data collection for the Salina Airport Authority (SAA). The questions and their respective answer options were identical across all three survey option modes. Our initial invitation to participate was sent by email on February 20, 2025. The e-cover letter with a unique Web survey link was signed by Shelli Swanson, SAA Director of Administration and Finance. In addition to the Web link to the survey, it also included a short video introducing the primary researchers on this study and the study's purpose. After the initial survey email was sent, two additional "waves" of emails were sent (March 27th and May 1st). The Docking Institute's University Center for Survey Research (UCSR) made follow-up phone calls to wave 1 non-responders prior to emailing wave two. It sent paper questionnaires when requested. And finally, near the end of the survey window, the UCSR attempted to contact the remaining non-respondents to complete the survey via telephone interview or by emailing to them a Web link to the online response option, per the targeted respondent's preference. Docking Institute made additional follow-up by emails and telephone calls were made on an "as-needed" basis, often following up on a targeted respondent inquiry. At the end of the survey period, 33 tenants submitted usable responses (a 32% overall response rate).

The model used in this study is based on the work of Wassily Leontif. Leontif's input-output models attempt to quantify the interdependences between the various sectors of an economy. The model used for this analysis is the

Implan® Software model. The Implan software and its database calculates appropriate industry level multipliers at the county level.

How an economy responds to changes in economic activity can be quantified based on the buy-sell relationships among the economic agents (businesses, governmental entities, and households) located within the studied economy. Input-Output (I-O) models estimate the inter-industry relationships in an economy (or region) by measuring the distribution of inputs purchased and output sold by each industry. By using I-O models, it is possible to calculate how the impact of one dollar flows or “ripples” through a regional economy. As this economic activity (measured by the dollar) flows through the economy, it causes additional economic activity (expenditures and employment). This is the multiplier effect: a quantitative measure of the ripple effects that an initial expenditure has on its economy.

The total economic impact on an economy is the sum of the initial economy activity, the Direct Effect, plus all of the secondary effects, the Multiplier Effect. The Multiplier Effect consists of the indirect effects that are the results of business-to-business transactions indirectly caused by the direct effects. Businesses initially benefiting from the direct effects will subsequently increase spending at other local businesses. The indirect effect is a measure of this increase in business-to-business activity. Induced effects are the result of increased personal income caused by both the direct and indirect effects. Businesses that experience increased revenue from the direct and indirect effects will then increase payroll expenditures by hiring more employees, raising salaries, or increasing payroll hours.

Households will then increase spending at local businesses. The induced effect is a measure of the increase in household-to-business activity.

Basic Economic Measures

Table 1 provides basic demographic measures of the City of Salina and Saline County, Kansas. More than 86 percent of the population in Saline County lives in the City of Salina. Nearly 60 percent of the people who live in Salina are between 18 and 64 years of age. This is the likely age range for employed people. Saline County had a Gross Regional Product (GRP) for 2024 as measured by Output of over 3.91 billion dollars. The median family income in Salina was \$60,624 while the average family income in Salina was \$77,358. The median per capita income was \$33,344.

Table 1: Basic Economic Measures, 2024

Measurement	Value
Population of Saline County	53,459
Population of Salina	46,109
Salina % of Saline County	86.3%
Salina Population Between 18 and 64 years	28,023
Percent of Salina Population Between 18 and 64	59.1%
Salina Number of Total Households	19,301
Salina Median Household Income	\$ 60,624
Salina Average Household Income	\$ 77,358

Source: <https://www.census.gov/quickfacts/fact/table/salinacitykansas/PST045223>

Source: <https://www.census.gov/quickfacts/fact/table/salinecountykansas/PST045224>

Table 2 provides insights into household characteristics for Saline County. The average household income reflects the large number of households that have two or more earners.¹ This reflects the diverse and robust economy associated with Salina as a regional center.

Table 2: Household Characteristics, Saline County, 2024

Measurement	Value
Total households	22,299
Average household size (persons)	2.34
Median Household Income	\$ \$ 63,316

Source: <https://www.census.gov/quickfacts/fact/table/salinecountykansas/PST045224>

Tables 1 and 2 show that the City of Salina and Saline County have a strong economy that is almost fully utilizing its available workforce.

¹ Household as used by the Census Bureau includes all the people at a residence whether they are related or not.

Private Businesses

The gross regional product (GRP), or the level of economic activity, for Saline County for 2024 was \$3,912,743,130. The total level of economic activity generated by the businesses located at SLN/AIC facilities was \$1,550,762,040. Table 3A shows the direct economic impact, the induced and the indirect economic activity, and the total economic impact for employment and output. Employment provides a measure of economic activity in terms of full-time jobs. Output measures economic activity in terms of gross regional product (GRP). The private businesses located at the SLN/AIC contributed 39.6 percent of the total economic activity for Saline County in 2024 when measured by Output but provided only 21 percent of the jobs. However, these are some of the most productive jobs in Saline County.

Table 3A: Business Impact, Saline County, 2024

Impact Type	Employment	Output
Direct Effect	4,653	\$ 1,076,800,830
Indirect Effect	1,907	\$ 251,704,093
Induced Effect	2,140	\$ 222,257,117
Total Effect	8,700	\$1,550,762,040

Sources: Survey, secondary sources, and Implan with additional calculations by the author

Table 3B provides an overview of where workers reside. The percentage of workers who live in Kansas, but outside of Saline County suggests that many workers choose to commute rather than relocate.

Table 3B: Employee Residence, Private Businesses

Residence	Percent
Employees Residing Within - Salina (inside city limits)	46.1%
Employees Residing Within - Saline County	5.5%
Employees Residing Within - Kansas	45.7%
Employees Residing Outside of Kansas	7.2%

Sources: Survey, with additional calculations by the author

Public Education Institutions

Table 4A shows the economic impacts of the educational institutions that are located at SLN/AIC. The Indirect Effect could not be measured because the necessary data at this level was not available. However, previous research suggests that it is a little less than the Induced Effect. The total level of economic activity generated by the educational institutions located at SLN/AIC facilities was \$32,461,000. The educational institutions located in the Salina Airport Authority contributed 0.8 percent of the total economic activity for Saline County in 2024. The number of jobs (530) associated with this sector is about 1.3 percent of the total jobs in Saline County. However, this analysis does not fully measure the value of these institutions and their graduates. The graduates of these institutions typically earn more and are more productive workers, but they may not stay in the local area. This highlights one of the limitations of economic analysis, as there are some factors that it does not measure.

Table 4A: Educational Institutions Impact, Saline County

Impact Type	Employment	Output
Direct Effect	461	\$ 22,675,000
Indirect Effect	0	\$ 0
Induced Effect	69	\$ 9,786,000
Total Effect	530	\$ 32,461,000

Sources: Survey, secondary sources, and Implan with additional calculations by the author

Table 4B provides an overview of where workers at educational institutions reside. The percentage of workers who live in Kansas, but outside of Saline County again suggests that many workers choose to commute rather than relocate.

Table 4B: Employee Residence, Educational Institutions

Residence	Percent
Employees Residing Within - Salina (inside city limits)	60.1%
Employees Residing Within - Saline County	3.7%
Employees Residing Within - Kansas	31.7%
Employees Residing Outside of Kansas	4.6%

Sources: Survey, with additional calculations by the author

Military Units

Table 5 shows the employment impact of the Kansas National Guard (KNG) military institutions² that are located at the SLN/AIC. Unfortunately, the scale of Kansas National Guard presence in Salina and Saline County was not reported as the data was consolidated to the state level. However, resources include facilities, equipment, and inventory used by the military, primarily for training purposes. Expenditures would mostly be consumable items associated with the various KNG resources. There is no indirect effect because these are the results of business-to-business transactions indirectly caused by the direct effects. The indirect effect is a measure of the increase in business-to-business activity, which does not occur with the military. It was reported that Kansas Army National Guard Training Center (KSTC) provided 394,407 training days (a “training day” is one day of training for one person) during 2024. Nickell Hall logged nearly 17,000 nights stayed for the year (a “night” is one night of stay for one person). Clearly KNG institutions and service members contribute to the economy of Salina and Saline County, but the dollar-amount cannot be reliably estimated with available data. The military institutions located at the SLN/SAIC contributed 41 civilian jobs for Saline County in 2024.

Table 5: Military Institutions Impact, Saline County, 2024

Impact Type	Employment
Direct Effect, Non-Military Employees	32
Induced Effect	9
Total Effect	41

Sources: Direct communication, with additional calculations by the author

² These include: Kansas Army National Guard Training Center (KSTC); 1st Battalion, 235th Regiment Officer Candidate School and Warrant Officer Candidate School; and 2nd Battalion, 235th Regiment; Regional Training Site, Maintenance; and 137th Chaplain Detachment.

Public Institutions and Other Entities

Table 6A shows the economic impacts of the public institutions and other entities that are located at the SLN/AIC. The public institutions are units of federal, state, and local government. As was true of both the educational institutions and the military, many of the benefits provided cannot be measured in economic terms. Additionally, some of the “other” entities do not directly generate economic activity, although they improve the quality of life for some citizens. The total level of economic activity generated by these public institutions and other entities located at the SLN/AIC facilities was \$37,604,000. The public institutions and other entities located at the SLN/AIC contributed 205 jobs and approximately 1 percent of the total economic activity for Saline County in 2024.

Table 6A: Public Institutions and Other Enterprises Total Impact, Saline County, 2024

Impact Type	Employment	Output
Direct Effect	89	\$ 22,606,000
Indirect Effect	74	\$ 9,916,000
Induced Effect	42	\$ 5,082,000
Total Effect	205	\$ 37,604,000

Sources: Survey, secondary sources, and Implan with additional calculations by the author

Table 6B reveals that employees tend to either live in Salina or outside of Saline County, but still in Kansas. This pattern has been seen in the other employee groups for which their place of residence was reported on the survey.

Table 6B: Employee Residence, Public Institutions and Other Enterprises

Residence	Percent
Employees Residing Within - Salina (inside city limits)	66.4%
Employees Residing Within - Saline County	16.8%
Employees Residing Within - Kansas	16.8%

Sources: Survey, with additional calculations by the author

Table 7 summarizes the residence for employees of private businesses, public educational institutions, and public institutions and other entities. More than 50 percent of employees reside in Saline County, and more than 92 percent reside in Kansas.

Table 7: Employee Residence, All Sectors

Residence	Percent
Employees Residing Within - Salina (inside city limits)	45.5%
Employees Residing Within - Saline County	5.5%
Employees Residing Within - Kansas	42.5%
Employees Residing Outside of Kansas	6.5%

Sources: Survey, with additional calculations by the author

Findings

Finally, Table 7 shows the total economic impact on Saline County that can be traced to the entities that are located at SLN/AIC facilities. The total level of economic activity generated by the private businesses, educational institutions, military units, public institutions, and other entities for 2024 was \$1,620,827,040. Altogether, SLN/AIC and its tenants contributed approximately 41.4 percent of the total economic activity in Saline County during 2024. The total employment associated with SLN/AIC and its tenants was 12,376 jobs (31.0 percent of the employment in Saline County).

Table 7: SLN/SAIC Total Impact, Saline County

Impact Type	Employment	Output
Direct Effect	5,235	\$ 1,122,081,830
Indirect Effect	1,881	\$ 261,620,093
Induced Effect	2,260	\$ 237,125,117
Total Effect	12,376	\$ 1,620,827,040

Sources: Summary findings from this report

What Could Not Be Measured

As was discussed earlier in the report, there were some businesses and organizations at SLN/AIC that did not provide useable responses to the survey. Although conservative estimates were generated from secondary data sources, it does mean that our estimates are likely smaller than they would have been with primary data from the non-reporting businesses and organizations.

The social benefits that are associated with the educational sector, the military sector, and the public/other sector were also beyond the scope of this project. These social benefits are generally viewed as valuable to the larger community, but it is difficult to place a monetary value on the benefits.

Finally, the perceptual benefits of a diverse and successful community when recruiting new businesses are very difficult to quantify. However, there is some evidence both from the recruitment of new businesses to SLN/AIC in the past year, the current expansion, and updating of processes at one of the largest businesses at the SLN/AIC. These events have increased both employment and output for Salina and Saline County.

ADDENDUM

**An Estimate of the Enplanement Activities Associated with
Commercial Air Travel at the Salina Regional Airport (SLN)**

Executive Summary – Chamber Membership Enplanements Survey

- The survey of Salina Chamber of Commerce members shows that for those responding businesses/organizations that use SLN for commercial air service it is an important benefit.
- Among even the survey's small sample, in-bound business visitors spent \$437,230 (outside dollars) in Salina.
- Tables 3, 5, and 8 show that business travel (and in-person meetings) are still an important part of the business process whether one is dealing with clients, vendors, or government officials.

Methods – Chamber Membership Enplanements Survey

The Docking Institute conducted a multi-wave online survey of Salina Area Chamber of Commerce membership. Chamber members were emailed a cover letter with an embedded, unique survey link allowing access to an online only questionnaire. The first invitation was emailed on February 20, 2025, and the final invitation was emailed on March 27, 2025. After removing some duplicates and undeliverables from the email list survey frame, 261 email invitations were opened, 305 were unopened, and 101 participated in the survey, resulting in an overall response rate of 16%. Of the 101 completions, 46 indicate their company/organization uses commercial air service at SLN. Those Salina Chamber of Commerce member businesses/organizations who use the SLN commercial air service are more likely to respond to a survey about enplanements than are non-users. Even so, we consider the amounts of total expenditures reported below to be the absolute lower boundaries of actual expenditures from enplanements given A) that some portion of the 74% of Chamber members not participating in the survey do use SLN commercial air service, and B) some of the businesses/organizations in the area who are not Chamber members, and, thus, did not receive an invitation to the survey, also use SLN commercial air service.

Analysis

This analysis is based on up to 46 business/organizational members of the Salina Chamber of Commerce who indicate on the survey that their business/organization uses commercial air service at the Salina Regional Airport.

Table 1 shows that 31 respondents considered air travel from SLN either moderately or very important for achieving their business objectives, 7 slightly important, 1 does not know, and 7 did not answer the question.

Table 1: How important is air travel from the Salina airport (SLN) to achieving your organizational/business objectives?

Slightly Important	7
Moderately Important	17
Very Important	14
Don't Know	1
Total	39

Table 2 shows that meetings and conferences were generally considered more important, followed by client visits and trade shows, and then vendor visits and other (11 did not respond to the question).

Table 2: Please rank (1 = most important, 6 = least important) the following reasons for your business-related air travel..

Purpose	Most Important					Least Important	Total Responses
Meetings	9	13	9	0	0	4	35
Conferences	17	11	4	1	0	2	35
Client Visits	3	7	6	6	7	6	35
Trade Shows	3	2	8	13	6	3	35
Vendor Visits	2	1	4	11	15	2	35
Other	1	1	4	4	7	18	35

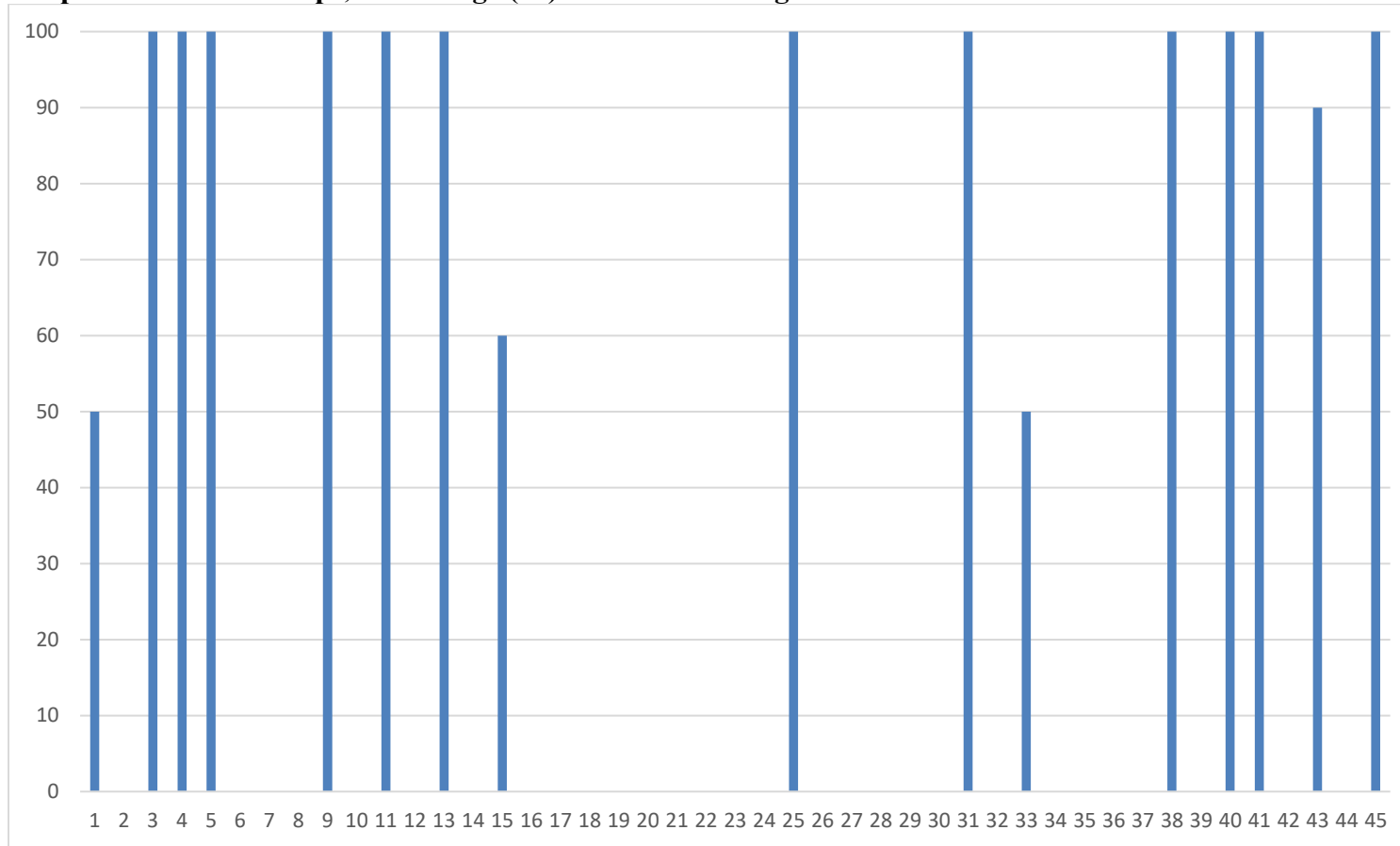
Table 3 shows the duration of visits associated with in-bound trips to SLN. Although one- or two-day visits are most common, there are some visits of one or more weeks. The total number of person visits, assuming only one person for each reported visit, is estimated to be 1,901. Lodging, meals, and vehicle rental expenses are estimated at \$230 per day. Thus, the in-bound business visitors spend \$437,230 outside dollars in Salina.

Table 3: In-Bound Trips, Duration of Visit

24 hours	48 hours	72 hours	More than 72 hours, less than one week	One week, less than two weeks	Two weeks or more
145	139	65	105	17	23

Graph 1 shows that almost all in-bound trips originate outside of Kansas.

Graph 1: In-Bound Trips, Percentage (%) Non Kansas Origin*



*Note: the horizontal axis shows how each responding business/organization reporting using SLN for commercial travel answered this question.

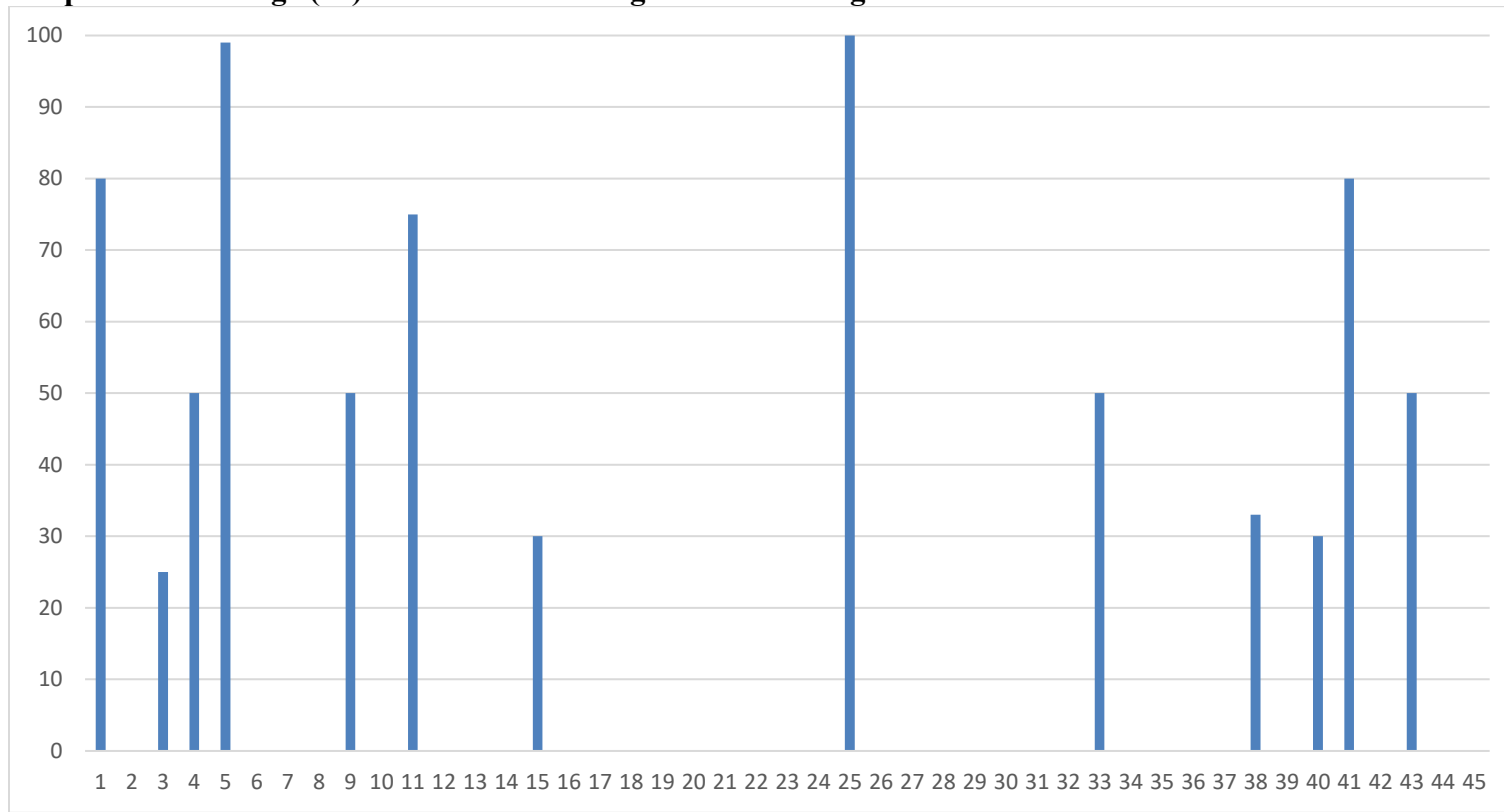
Table 4 shows that in-bound flights most often are direct or have a single intermediate stop, although there are some in-bound flights that involve multiple intermediate flights.

Table 4: Number of Stops Among Those Reporting In-bound Trips (n=16)

Stops	In-bound Trips
0	3
1	9
2	3
3	0
4	0
5	1

Graph 2 shows the percentage of in-bound flights from Chicago compared with Denver according to the survey respondents. There were 6 respondents who indicated no in-bound flights from Chicago.

Graph 2: Percentage (%) of the In-bound Flights from Chicago Versus Denver*



*Note: the horizontal axis shows how each responding business/organization reporting using SLN for commercial travel answered this question.

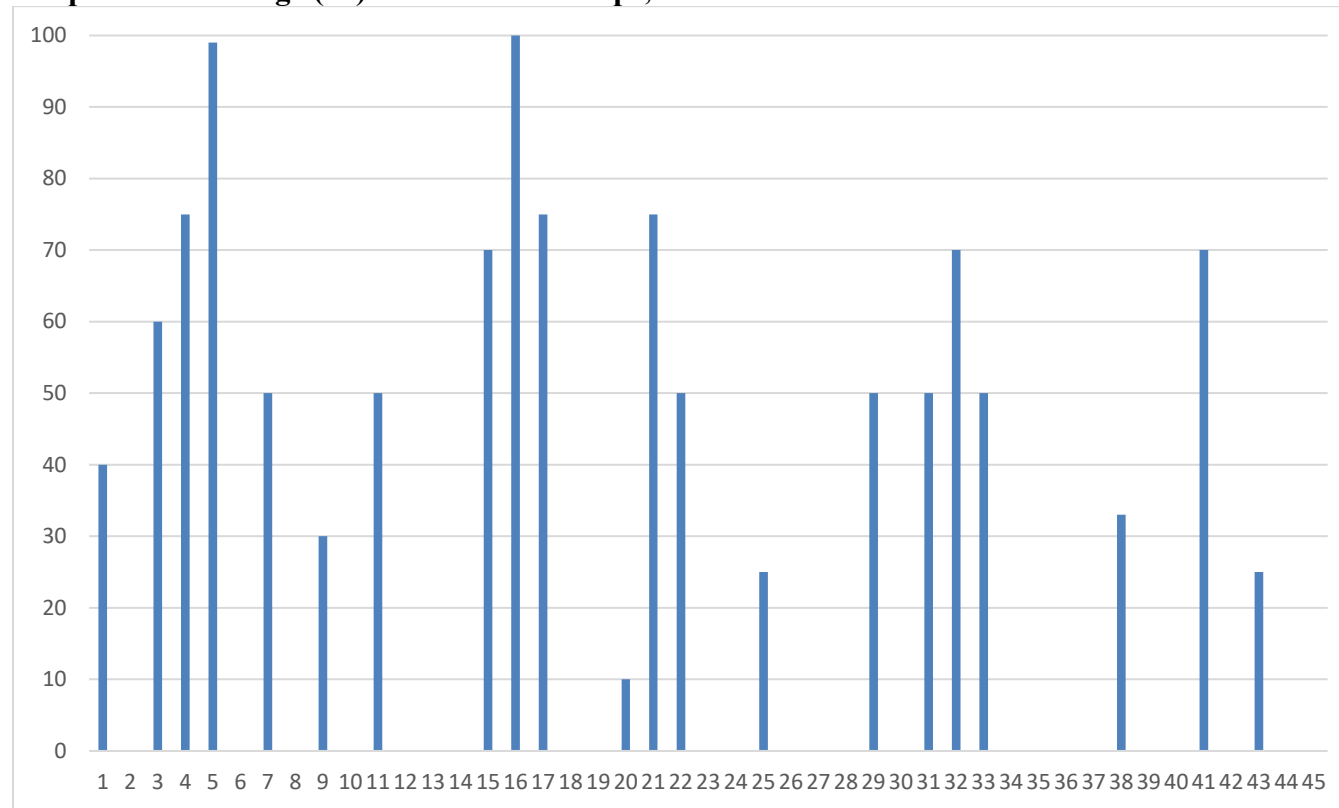
Table 5 shows the duration of visits associated with out-bound trips from SLN. Although shorter visits (less than one week) are most common, there are some visits of one or more weeks.

Table 5: Annual Out-bound Person-trips, by Duration

24 hours	48 hours	72 hours	More than 72 hours, less than one week	One week, less than two weeks	Two weeks or more
110	128	92	127	19	36

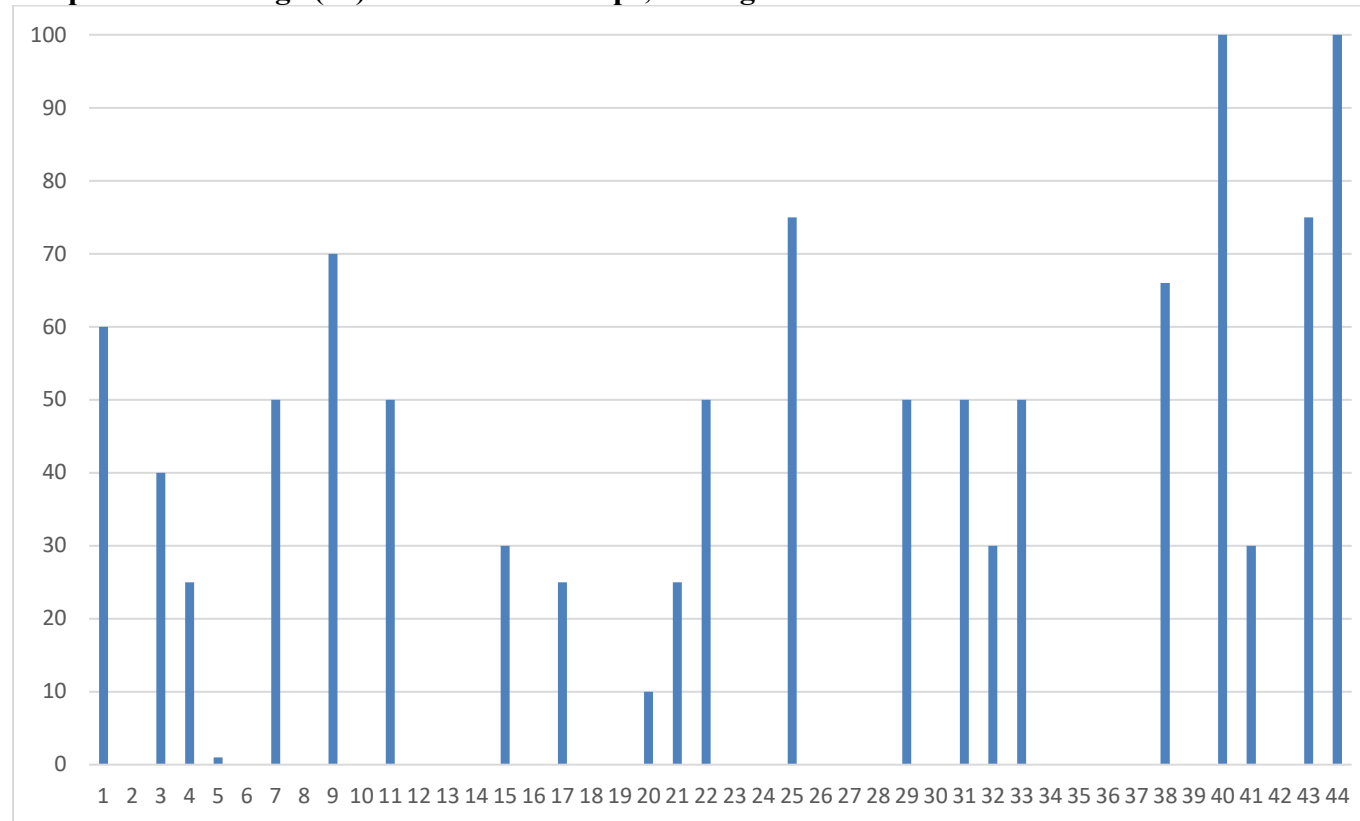
Graphs 3 and 4 show the out-bound trips to Denver (west bound) and Chicago (east bound). The graphs show similar patterns with only a few respondents (4) choosing only one destination.

Graph 3: Percentage (%) of Out-bound Trips, Denver*



*Note: the horizontal axis shows how each responding business/organization reporting using SLN for commercial travel answered the this question.

Graph 4: Percentage (%) of Out-bound Trips, Chicago*



*Note: the horizontal axis shows how each responding business/organization reporting using SLN for commercial travel answered the this question.

Table 6 shows the total and average annual air travel budget for the 19 respondents who shared this information.

Table 6: Annual Air Travel Budget

Total	\$ 114,500
Average	\$ 6,026
Number	19

Table 7 provides insight into the associated total expenses involved in business travel for all respondents who shared this information, as well as the average for those who shared specific expense categories. Meals and lodging were generally paid for while entertainment was not paid. Table 7 also shows that these respondents used other airports for their travel.

Table 7: Average Annual Expenses

	Commercial Airline tickets to fly from airport other than Salina	Commercial Airline tickets (per person-trip from Salina	Meals (per business trip)	Lodging (per business trip)	Entertainment (per business trip)
Total	\$ 186,500	\$ 40,000	\$ 12,600	\$ 133,975	\$ 1,850
Average	\$ 13,321	\$ 2,857	\$ 969	\$ 9,569	\$ 370
Number	14	14	13	14	5

Finally, Table 8 shows the most common out-bound business destination. Washington, D.C., the seat of the federal government, was the most common destination. The 46 responding businesses/organizations who report utilizing commercial air service at SLN clearly see a business value from easy access to commercial air service.

Table 8: Most Common Out-bound Business Destinations

Washington, D.C.	8
Chicago	7
Denver	4
Houston	4
Atlanta	4
Las Vegas	3
Los Angeles	2

Findings

Although the sample size for this study is small, it is clear that for the businesses/organizations using SLN commercial air service, it is an important benefit. The in-bound business visitors spent \$437,230 (outside dollars) in Salina. Tables 3, 5, and 8 show that business travel (and in-person meetings) are still an important part of the business process whether one is dealing with clients, vendors, or government officials. Those Salina Chamber of Commerce member businesses/organizations who use the SLN commercial air service are more likely to respond to a survey about enplanements than are non-users. Even so, we consider the amounts of total expenditures reported herein to be the absolute lower boundaries of actual expenditures from enplanements given A) that some portion of the 74% of Chamber members not participating in the survey do use SLN commercial air service, and B) some of the businesses/organizations in the area who are not Chamber members, and, thus, did not receive an invitation to the survey, also use SLN commercial air service.