

Wyoming Air Service Update

Per W.S. § 10-3-602(C), 10-7-104



Wyoming Air Service Update



- Director K. Luke Reiner's Opening Comments
 - Effects of COVID-19
 - Construction
 - Budget
 - Upcoming Challenges



Wyoming Air Service Update

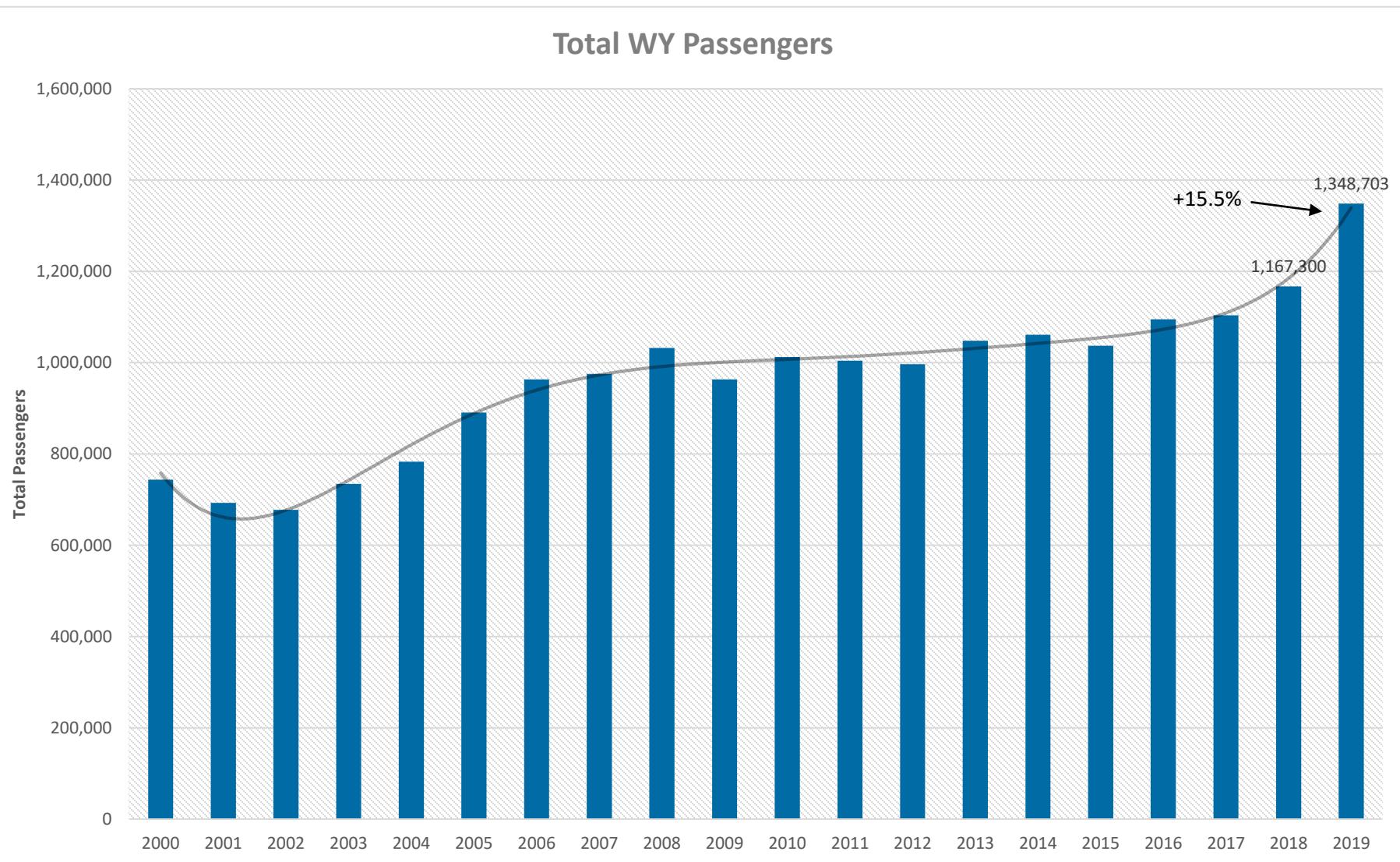


1. Statewide Figures
2. COVID-19 Impacts
3. Air Service Enhancement Program (ASEP) Update
4. Commercial Air Service Improvement Act/Capacity Purchase Agreement (CPA)
5. Update on the Airport Improvement Program (AIP)



Wyoming Air Service Update

Total State Passenger Levels

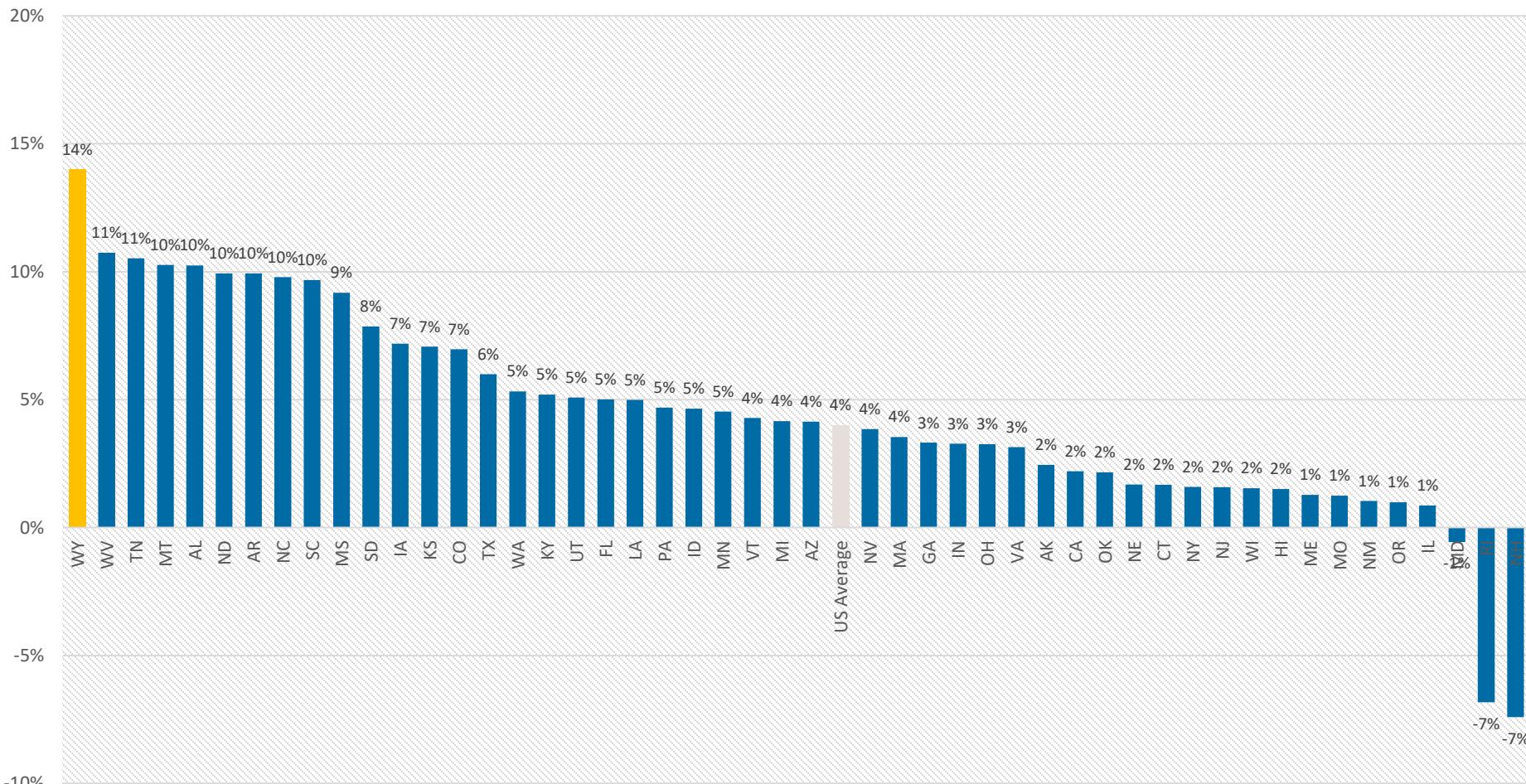


Wyoming Air Service Update

Total State Passenger Levels



% Change in Enplanements 2018-2019

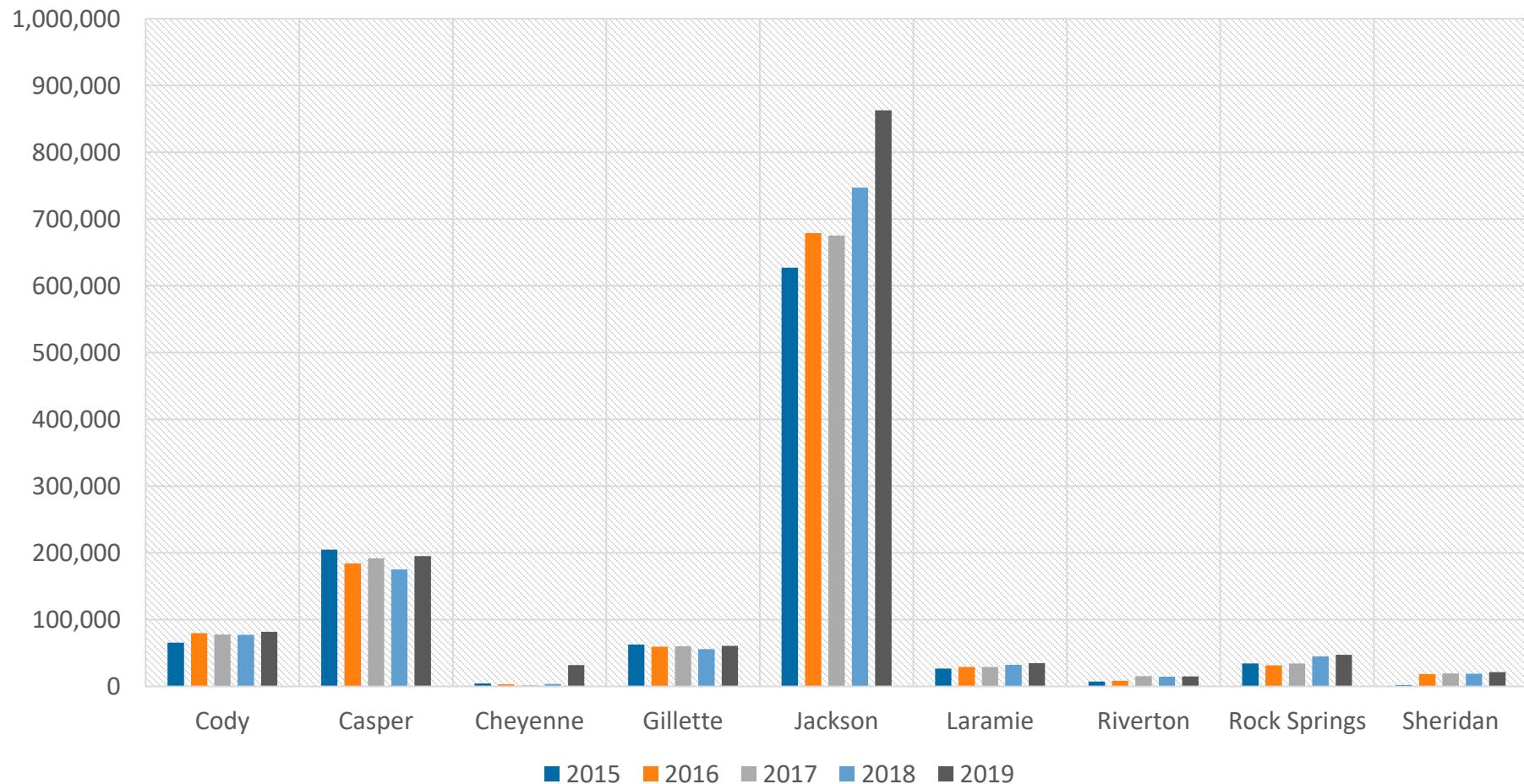


Wyoming Air Service Update

Total State Passenger Levels – Calendar Year



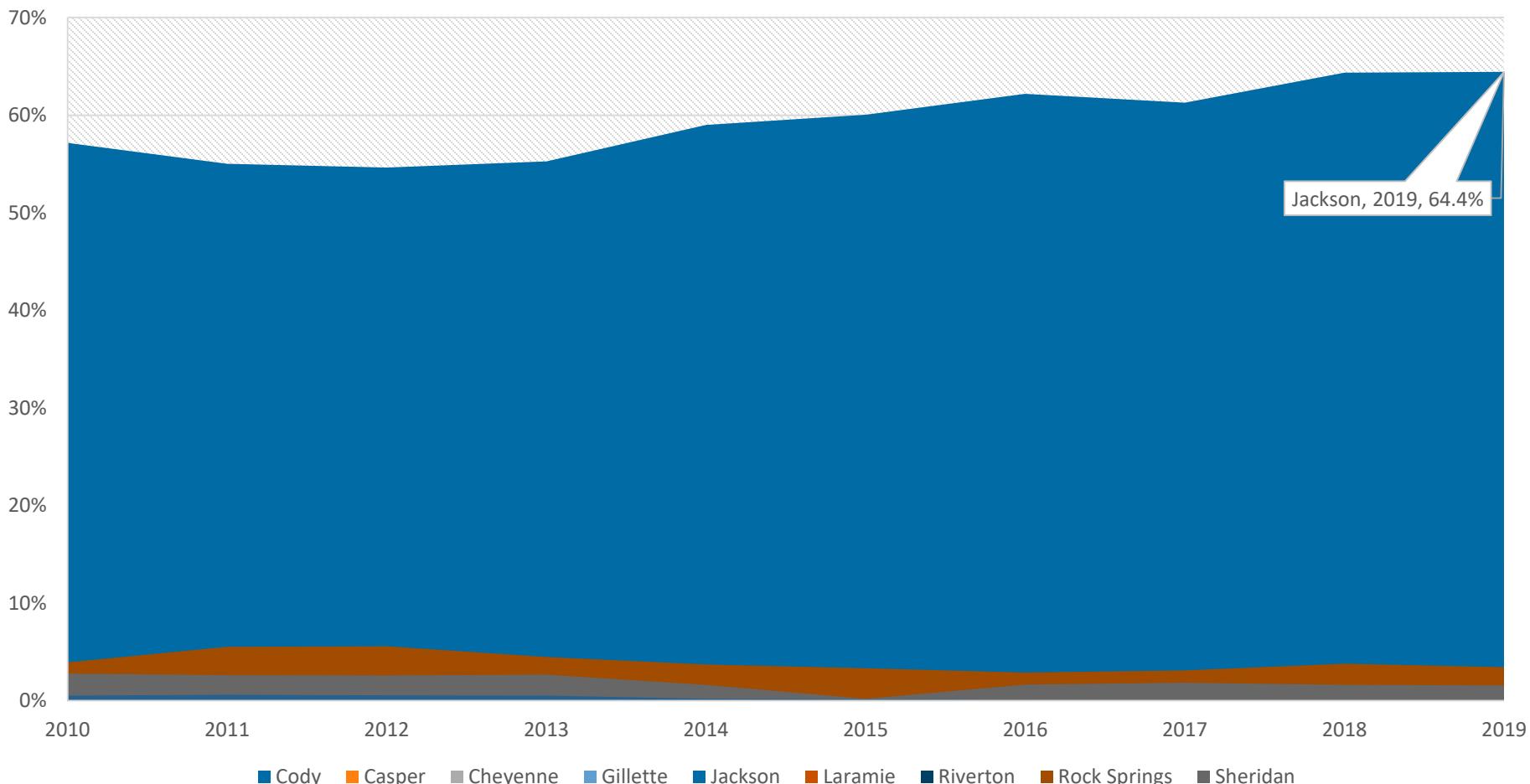
Total WY Passengers



Wyoming Air Service Update



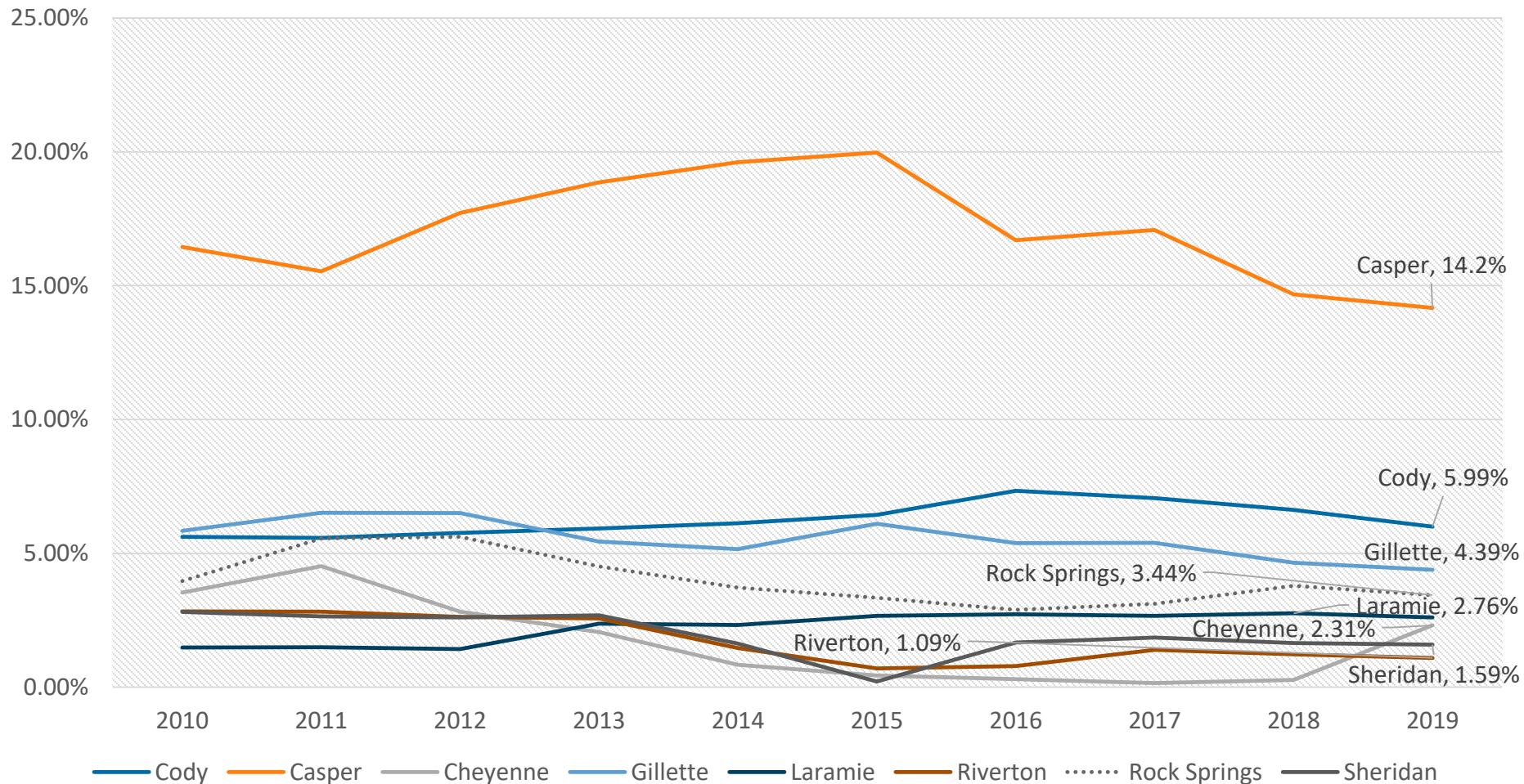
% Share of WY Enplanements by Airport



Wyoming Air Service Update



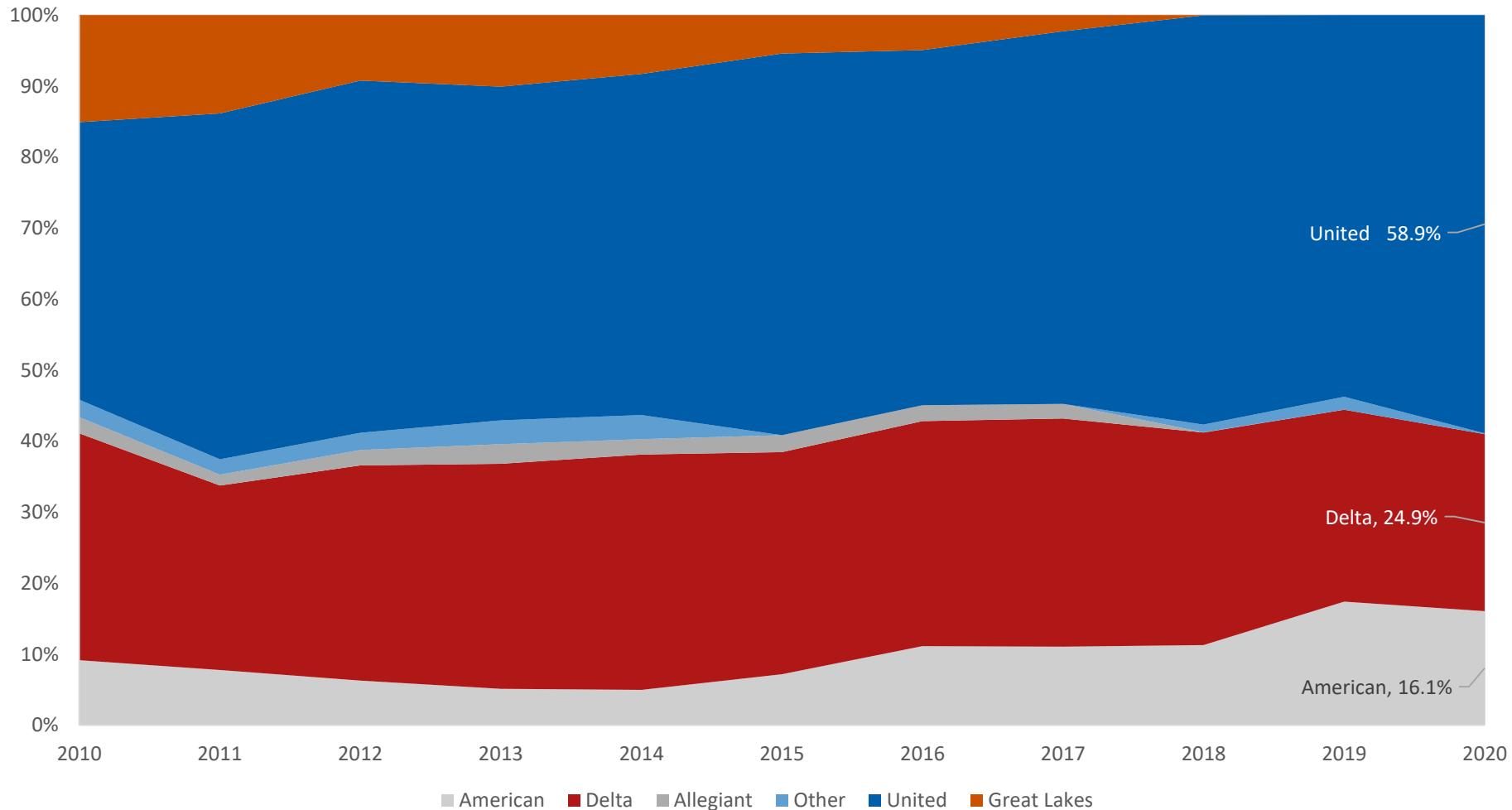
% Share of WY Enplanements by Airport (Excluding Jackson Hole)



Wyoming Air Service Update



WY % Share of Departing Seats by Airline

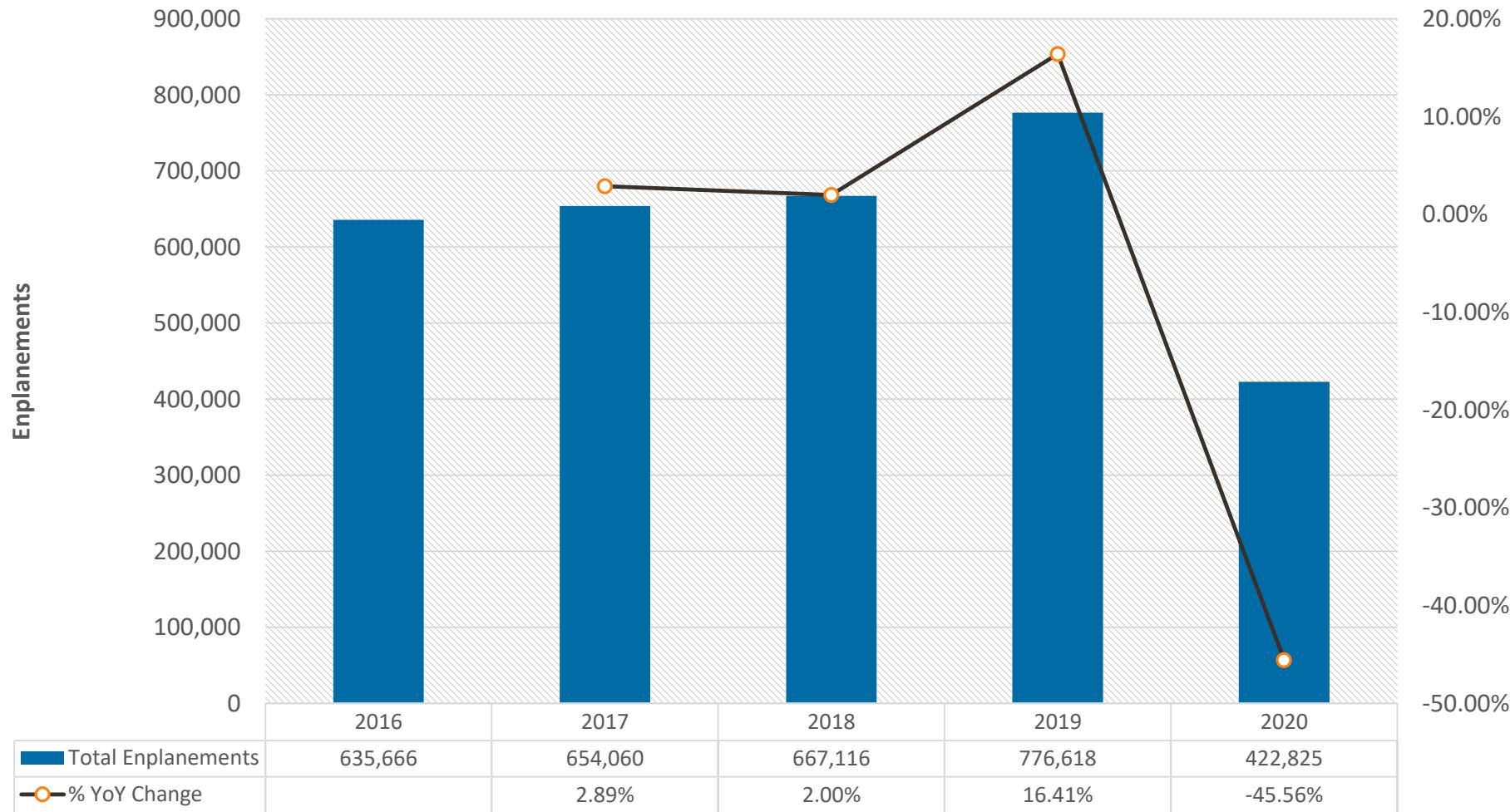


Wyoming Air Service Update

Total State Passenger Levels – First Six Months of Calendar Year

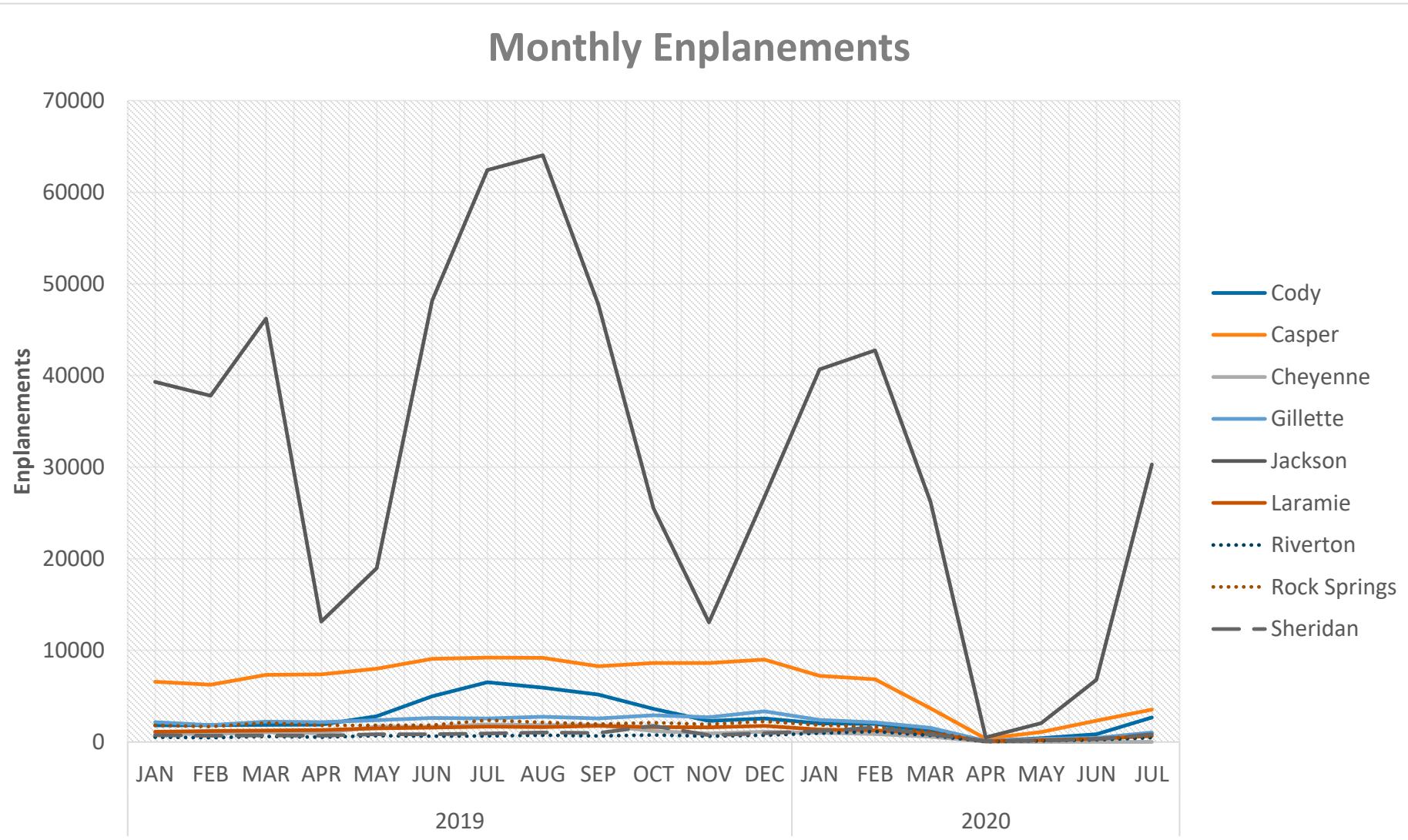


January-June Enplanements Only



Wyoming Air Service Update

Monthly Enplanements

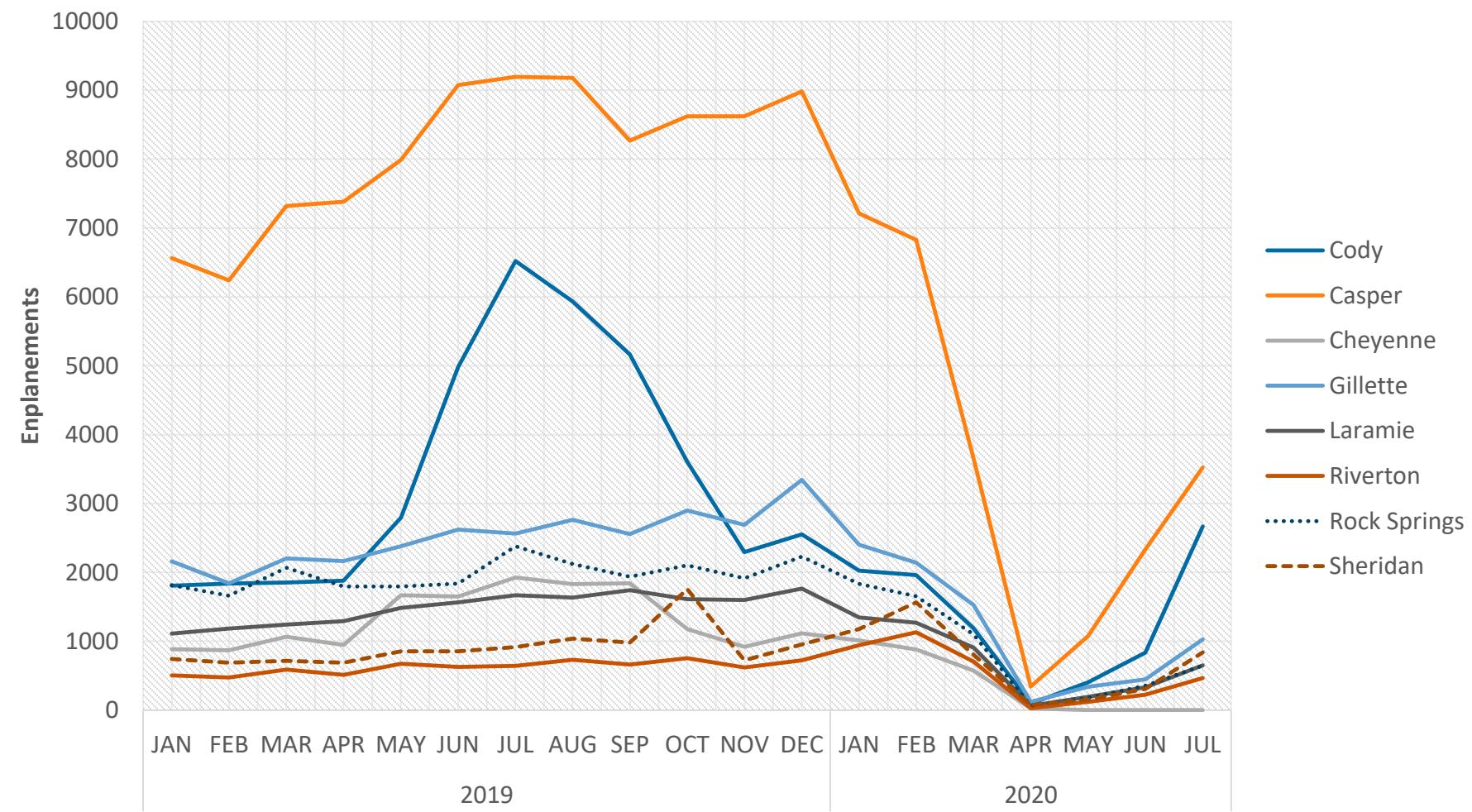


Wyoming Air Service Update

COVID-19 Impacts – Monthly Enplanements



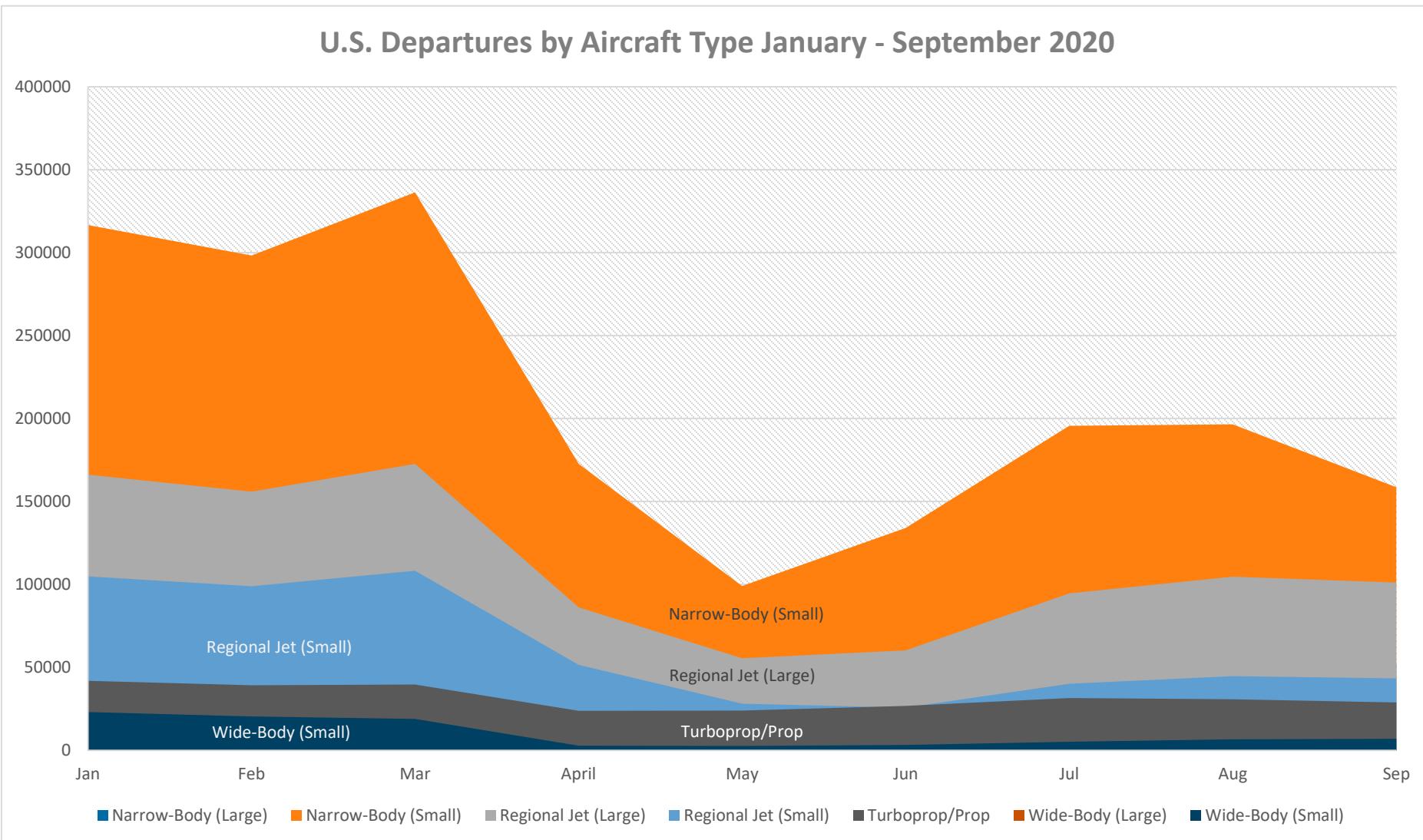
Monthly Enplanements (Excluding Jackson)



Wyoming Air Service Update



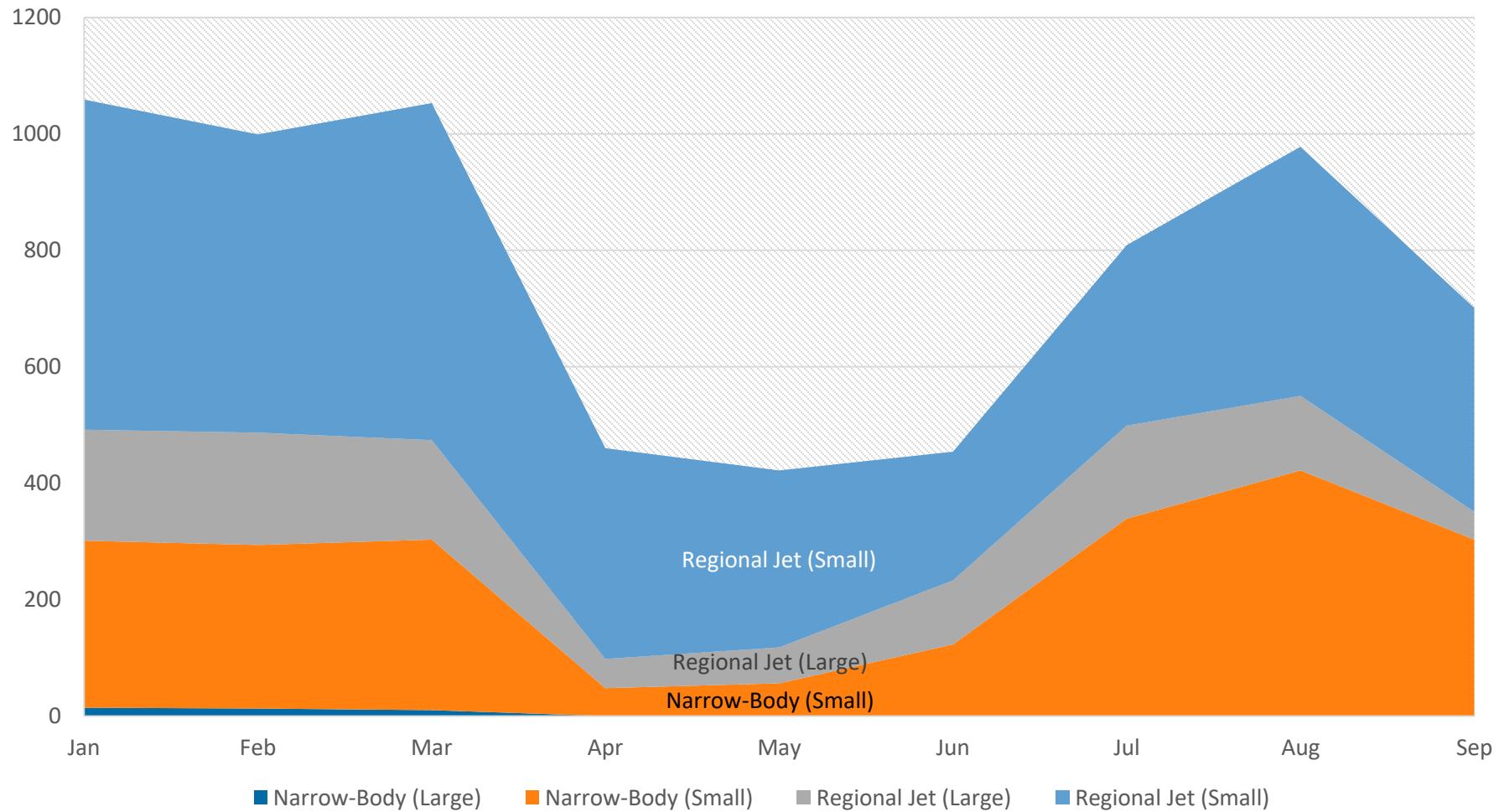
U.S. Departures by Aircraft Type January - September 2020



Wyoming Air Service Update



WY Departure by Aircraft Type January - September 2020



Wyoming Air Service Update

Booking Trends through August



Nationally

- Leisure traffic is down 77%
- Corporate and business traffic is down 89%

Wyoming

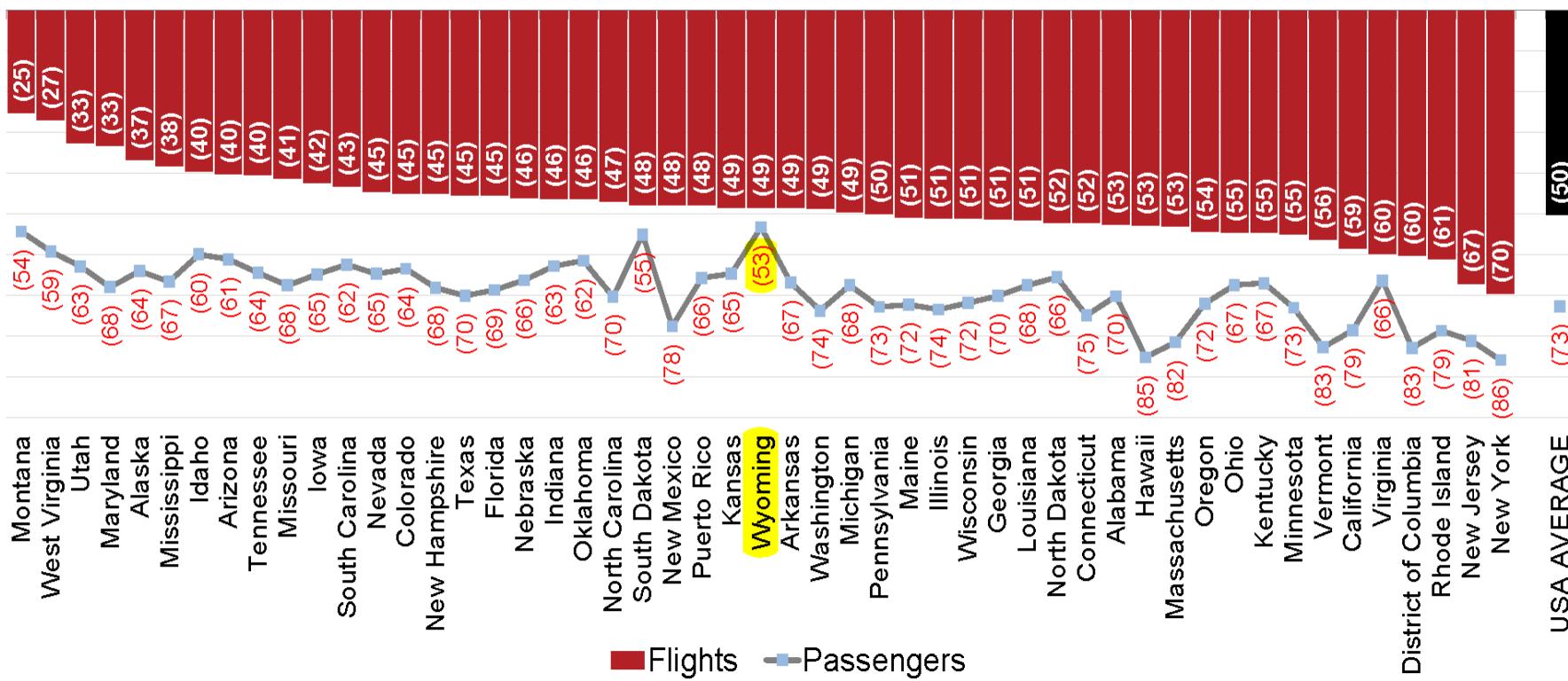
- Leisure traffic is down 37%
- Corporate and business traffic is down 70%
- Visiting traffic to WY is responsible for 93% of current traffic
- 2020 visiting traffic outnumbers originating traffic by 15 to 1
 - Compared to 6 to 1 in 2019

National Changes in Flights and Passengers



Wyoming had Smallest Decline in Passengers for July

Nationwide, New York Has Seen the Largest Reductions in Flights and Air Travelers
 Percent Change: July 2020 vs. July 2019



Sources: TSA for traveler throughput; Diio by Cirium published schedules (July 31, 2020) for all airlines providing scheduled service to all destinations

Note: DC consists of Washington Reagan (DCA) and Dulles (IAD)

Post COVID-19 Impacts to WY



- Short-term (1-3 months)
 - Traffic rebound based on visiting leisure traffic
 - Fall seasonal reductions
 - Downward pressure on fares
- Medium-term (4-12 months)
 - Small increase in business traffic expected
 - Total capacity reductions likely to be down 30-40% from 2019
 - Downward pressure on fares
- Long-term (12+ months)
 - Unknown aircraft availability
 - Fewer 50 seat aircraft providers
 - Unknown impacts from pilot scope clauses
 - CPA establishes long-term success
 - Reduced fares may speed up small aircraft retirement
 - Small airports most at risk

Post COVID-19 Impacts



- More small airports are losing or are expected to lose service
 - More small airports around the nation have been left with no service after October 1st
- The Capacity Purchase Agreement (CPA)
 - Not just about cost savings
 - Backstop for retaining commercial service in a volatile travel environment
 - Securing resources for Wyoming

Air Service Enhancement Program (ASEP)

Fiscal Year 2019 Expenditures



FY 2019 Update	Cody-Yellowstone Regional Airport (COD)	Riverton - Central Wyoming Regional Airport (RIW)	Rock Springs - Southwest Wyoming Regional Airport (RKS)	Sheridan County Airport (SHR)
Original Term	June 22, 2019 - September 29, 2019	July 1, 2018 - June 30, 2019	July 1, 2018 - June 30, 2019	July 1, 2018 - June 30, 2019
Amended Term	-	July 1, 2018 - January 11, 2020	July 1, 2018 - September 30, 2019	July 1, 2018 - January 11, 2020
State Percent Match	40%	60%	60%	60%
Original State Grant	\$ 134,400	\$ 596,937	\$ 715,514	\$ 596,937
Amendment	\$ -	\$ 935,000	\$ -	\$ 935,000
Total State Grant	\$ 134,400	\$ 1,531,936	\$ 715,514	\$ 1,531,936
State Grant Expended	\$ (41,250)	\$ (1,222,519)	\$ (714,737)	\$ (1,220,194)
State Dollars Recovered	\$ 93,150	\$ 309,417	\$ 777	\$ 311,742
Local Dollar Match	\$ 61,876	\$ 813,463	\$ 477,009	\$ 815,013
Local Dollar Percentage Match	60%	40%	40%	40%
Passengers	1,527	22,946	60,010	32,109

Air Service Enhancement Program (ASEP)

Fiscal Year 2020



FY 2020	Cheyenne Regional Airport (CYS) AA	Cheyenne Regional Airport (CYS) UA	Jackson Hole Airport (JAC)
Airline	American Eagle Operated by SkyWest	United Express Operated by SkyWest	American Airlines
Original Term	November 1, 2019 - October 31, 2020	November 11, 2020 - May 31, 2021	December 18th, 2020 - April 6th, 2020
Amended Term	November 1, 2019 - April 12, 2020	-	December 18th, 2020 - March, 25, 2020
State Percent Match	30.1%	60.0%	40%
State Grant	\$ 600,000	\$ 527,551	\$ 140,000
State Dollars Expended	\$ (239,702)	Ongoing	\$ (140,000)
State Dollars Recovered	\$ 360,298	\$ -	\$ -
Local Dollar Match	\$ 1,393,355	\$ 351,701	\$ 210,000
Local Dollar Percentage Match	69.9%	40.0%	60.0%
Passengers	9,107	22,000 (Est)	12,677

Capacity Purchase Agreement

Fiscal Year 2020 Expenditures



CPA FY 2020	Gillette - Northeast Wyoming Regional Airport (GCC)	Riverton - Central Wyoming Regional Airport (RIW)	Rock Springs - Southwest Wyoming Regional Airport (RKS)	Sheridan County Airport (SHR)
Term	October 6, 2019 - June 30, 2020	January 12, 2020 - June 30, 2020	October 6, 2019 - June 30, 2020	January 12, 2020 - June 30, 2020
State Percent Match	60%	60%	60%	60%
State Grant	\$ 496,854	\$ 455,424	\$ 497,440	\$ 429,846
State Dollars Expended	\$ (375,961)	\$ (329,922)	\$ (497,440)	\$ (418,973)
State Dollars Recovered	\$ 120,893	\$ 125,502	\$ -	\$ 10,873
Local Dollar Match	\$ 331,236	\$ 303,616	\$ 331,627	\$ 286,564
Local Dollar Percentage Match	40%	40%	40%	40%
Passengers	32,014	6,316	22,940	7,374

Capacity Purchase Agreement



- CPA Highlights Prior to COVID-19
 - Gillette had its best 4th Quarter (Oct-Dec) ever
 - Best January and second best February
 - Riverton had its second best February ever
 - Sheridan had its best February ever
 - More than doubled enplanements from 2019

Capacity Purchase Agreement

Working as Intended Prior to COVID-19



- More passengers, lower cost
 - 60% reduction in cost per passenger in Riverton and Sheridan combined
 - 43% more passengers
 - 9% reduction in overall costs

Total Cost Per Passenger		
	2019	2020
Sheridan	\$ 89.17	\$ 42.29
Riverton	\$ 111.72	\$ 38.55

Capacity Purchase Agreement

Reducing the Cost of Commercial Air Service



October – February (RKS, GCC)

January – February (RIW/SHR)

	ASEP (18/19)	CPA (19/20)
Passengers	46,481	55,616
State Cost	\$ 707,263	\$ 631,702



Capacity Purchase Agreement

CARES Act



- \$4.2 Million in relief to the Capacity Purchase Agreement (CPA), authorized by the Governor's Office for use on additional expenditures realized by COVID-19
 - State and local
 - For use between March 2020 and December 2020



CARES Act - FAA



- Federal CARES Act
 - Appropriated in 2020
 - Total \$52,463,342 at 100% match
 - For Airport Development
 - \$2,705,063
 - For Airport Operations
 - \$49,758,279 (currently)
 - Some will be designated for development



FY 20 Airport Construction



Airport Name	Project Description	Federal	State	Local	Total
Afton - Lincoln County Municipal Airport	Construct Taxi lane E, F, Extend Taxi lane B, and Relocate Connector A5	\$1,200,343.00	\$0.00	\$0.00	\$1,200,343.00
Buffalo - Johnson County Airport	Repair RW Slope Failure and Construct TW Turnaround	\$1,525,125.00	\$0.00	\$0.00	\$1,525,125.00
Buffalo - Johnson County Airport	Seal Coat and Mark Pavements	\$0.00	\$103,500.00	\$11,500.00	\$115,000.00
Casper - Natrona County International Airport	Construct SRE Building	\$270,838.00	\$0.00	\$0.00	\$270,838.00
Casper - Natrona County International Airport	Reconstruct/ Rehabilitate Parking Lot	\$0.00	\$800,000.00	\$0.00	\$800,000.00
Casper - Natrona County International Airport	Repair Terminal Roof, Area B	\$0.00	\$540,000.00	\$135,000.00	\$675,000.00
Casper - Natrona County International Airport	Seal Coat and Mark Pavements	\$0.00	\$968,400.00	\$107,600.00	\$1,076,000.00
Cheyenne Regional Airport - Jerry Olson Field	Reconstruct RW 9/27	\$14,672,585.00	\$3,937.00	\$984.00	\$14,677,506.00
Cody - Yellowstone Regional Airport	Extend Access Road and Expand Auto Parking	\$1,245,204.00	\$0.00	\$0.00	\$1,245,204.00
Cowley - North Big Horn County Airport	Construct Wildlife Fence	\$462,792.00	\$0.00	\$0.00	\$462,792.00
Douglas - Converse County Airport	Seal Coat and Mark Pavements	\$0.00	\$56,700.00	\$6,300.00	\$63,000.00
Evanston - Uinta County Airport - Burns Field	Reconstruct Apron, Phase IV	\$952,486.00	\$48,000.00	\$12,000.00	\$1,012,486.00
Gillette - Northeast Wyoming Regional Airport	Seal Coat and Mark Pavements	\$0.00	\$110,700.00	\$12,300.00	\$123,000.00

FY 20 Airport Construction Cont'd



Airport Name	Project Description	Federal	State	Local	Total
Hulett Municipal Airport	Upgrade Airfield Lighting	\$1,333,333.00	\$45,000.00	\$5,000.00	\$1,383,333.00
Jackson Hole Airport	Mark Pavements (Emergency Request - Part 139 Inspection)	\$0.00	\$181,327.00	\$109,724.00	\$291,051.00
Jackson Hole Airport	Rehabilitate Access Road and Improve Landside Storm Drainage	\$3,013,069.00	\$2,592.00	\$1,201,728.00	\$4,217,389.00
Kemmerer Municipal Airport	Relocate Fuel System	\$0.00	\$3,370.00	\$375.00	\$3,745.00
Laramie Regional Airport	Expand Commercial Terminal Building	\$41,051.00	\$501,642.00	\$333,333.00	\$876,026.00
Lusk Municipal Airport	Construct GA Terminal Building	\$884,450.00	\$0.00	\$0.00	\$884,450.00
Lusk Municipal Airport	Seal Coat and Mark Pavements	\$0.00	\$91,800.00	\$10,200.00	\$102,000.00
Newcastle - Mondell Field	Expand Hangar Apron and Taxilane and Extend Wildlife Fence	\$252,208.00	\$0.00	\$0.00	\$252,208.00
Newcastle - Mondell Field	Seal Coat and Mark Pavements	\$0.00	\$90,000.00	\$10,000.00	\$100,000.00
Pine Bluffs Municipal Airport	Construct GA Terminal Building	\$946,351.00	\$29,458.00	\$19,638.00	\$995,447.00
Pinedale - Ralph Wenz Field	Rehabilitate R/W	\$315,593.00	\$0.00	\$0.00	\$315,593.00
Powell Municipal Airport	Extend TW A to RW 13	\$806,503.00	\$244.00	\$163.00	\$806,910.00

FY 20 Airport Construction Cont'd



Airport Name	Project Description	Federal	State	Local	Total
Rawlins Municipal Airport - Harvey Field	Rehabilitate RW 4/22	\$5,831,197.00	\$0.00	\$0.00	\$5,831,197.00
Riverton - Central Wyoming Regional Airport	Rehabilitate T/W A, C1	\$308,501.00	\$0.00	\$0.00	\$308,501.00
Rock Springs - Southwest Wyoming Regional Airport	Construct Fuel System, Site Preparation	\$0.00	\$671,571.00	\$167,894.00	\$839,465.00
Rock Springs - Southwest Wyoming Regional Airport	Construct SRE Building	\$3,200,000.00	\$912,500.00	\$101,389.00	\$4,213,889.00
Sheridan County Airport	Rehabilitate and Expand Commercial Terminal Building	\$65,448.00	\$20,618.00	\$13,745.00	\$99,811.00
Sheridan County Airport	Seal Coat and Mark Pavements	\$0.00	\$502,200.00	\$55,800.00	\$558,000.00
Total		\$37,327,077.00	\$5,683,559.00	\$2,314,673.00	\$45,325,309.00

FY 21 Airport Construction



Airport Name	Project Title	Total Allocated Federal	Allocated State	Allocated Local	Total Allocated
Afton - Lincoln County Municipal Airport	Seal Coat and Mark Pavements	\$0.00	\$180,000.00	\$20,000.00	\$200,000.00
Big Piney - Miley Memorial Field	Construct Snow Removal Equipment Building	\$300,000.00	\$20,000.00	\$13,333.00	\$333,333.00
Big Piney - Miley Memorial Field	Seal Coat and Mark Pavements	\$0.00	\$180,000.00	\$20,000.00	\$200,000.00
Casper - Natrona County International Airport	Reconstruct/ Rehabilitate Parking Lot	\$0.00	\$800,000.00	\$0.00	\$800,000.00
Casper - Natrona County International Airport	Upgrade Lighting T/W B, C	\$1,175,000.00	\$47,000.00	\$31,333.00	\$1,253,333.00
Cody - Yellowstone Regional Airport	Reconstruct Wildlife Fencing	\$1,000,000.00	\$40,000.00	\$26,667.00	\$1,066,667.00
Dubois Municipal Airport	Seal Coat and Mark Pavements	\$0.00	\$125,100.00	\$13,900.00	\$139,000.00
Evanston - Uinta County Airport - Burns Field	Rehabilitate RW, Upgrade RW and TW Lighting	\$150,000.00	\$10,000.00	\$6,667.00	\$166,667.00
Evanston - Uinta County Airport - Burns Field	Seal Coat and Mark Pavements	\$0.00	\$222,300.00	\$24,700.00	\$247,000.00
Fort Bridger Airport	Seal Coat and Mark Pavements	\$0.00	\$180,000.00	\$20,000.00	\$200,000.00
Gillette - Northeast Wyoming Regional Airport	Construct GA Terminal Building	\$2,000,000.00	\$80,000.00	\$53,333.00	\$2,133,333.00
Gillette - Northeast Wyoming Regional Airport	Rehabilitate RW 16/34 and RW 3	\$0.00	\$41,600.00	\$10,400.00	\$52,000.00
Greybull - South Big Horn County Airport	Relocate Hangar Taxilane	\$525,000.00	\$35,000.00	\$23,333.00	\$583,333.00
Jackson Hole Airport	Rehabilitate Runway	\$8,500,000.00	\$340,000.00	\$793,334.00	\$9,633,334.00

FY 21 Airport Construction Cont'd



Airport Name	Project Description	Federal	State	Local	Total
Jackson Hole Airport	Seal Coat and Mark Pavements	\$0.00	\$261,000.00	\$29,000.00	\$290,000.00
Kemmerer Municipal Airport	Construct SRE Building	\$300,000.00	\$20,000.00	\$13,333.00	\$333,333.00
Kemmerer Municipal Airport	Seal Coat and Mark Pavements	\$0.00	\$225,000.00	\$25,000.00	\$250,000.00
Lander - Hunt Field	Relocate TW A (RW 22 End)	\$300,000.00	\$20,000.00	\$13,333.00	\$333,333.00
Pinedale - Ralph Wenz Field	Expand E GA Apron	\$5,000,000.00	\$333,333.00	\$222,222.00	\$5,555,555.00
Pinedale - Ralph Wenz Field	Rehabilitate R/W	\$3,650,000.00	\$243,334.00	\$162,222.00	\$4,055,556.00
Pinedale - Ralph Wenz Field	Seal Coat and Mark Pavements	\$0.00	\$173,700.00	\$19,300.00	\$193,000.00
Riverton - Central Wyoming Regional Airport	Rehabilitate North GA Apron	\$0.00	\$24,000.00	\$6,000.00	\$30,000.00
Rock Springs - Southwest Wyoming Regional Airport	Construct SRE Building	\$0.00	\$392,000.00	\$43,556.00	\$435,556.00
Rock Springs - Southwest Wyoming Regional Airport	Seal Coat and Mark Pavements	\$0.00	\$722,700.00	\$80,300.00	\$803,000.00
Saratoga - Shively Field	Improve Auto Parking, Access Road and Fence	\$300,000.00	\$20,000.00	\$13,333.00	\$333,333.00
Sheridan County Airport	Construct Auto Parking	\$1,000,000.00	\$40,000.00	\$26,667.00	\$1,066,667.00
Total:		\$24,200,000.00	\$4,776,067.00	\$1,711,266.00	\$30,687,333.00

Commercial Terminals



- New/Rehabilitated/Expanded Terminals in last 5 years:
 - Cheyenne
 - Laramie
 - Sheridan
- Rehabilitations/Expansions Scheduled in the next 5 years:
 - Cody
 - Rock Springs
 - Casper
 - Jackson



FAA Supplemental Discretionary



- Federal Supplemental Discretionary
 - Scheduled for 2021 Construction
- Pinedale – Ralph Wenz Field
 - Expand General Aviation Apron
 - \$5,000,000 Federal (Appropriated 2019)
 - \$333,333 State
- Rock Springs – Southwest Wyoming Regional Airport
 - Expand Terminal Building
 - \$4,600,000 Federal (Appropriated 2020)
 - \$0 State

Statewide Aviation Economic Impact Study Update



- Study underway of the economic activity supported by Wyoming's public use airports
 - Jobs, annual payroll, and economic output (spending)
- Documents the many ways aviation and airports support the state
- Statewide and individual airport analyses
 - 34 public use airports in the state
 - Airport sponsors are able to use the products from this study to educate local decision makers and the public on the value of their local airport
- Includes an update to the return on investment study (ROI) for air service development projects
- Anticipate completion before the end of the year (ahead of schedule)
 - Executive level summary available this fall
 - The study was last completed in 2013