

Wyoming Air Service Update



Air Transport Liaison Committee Jackson, WY

Per W.S. § 10-3-602(C), § 10-7-104
September 3, 2025

Wyoming Air Service Update



- Director Darin Westby's Opening Comments
- Shawn Burke, Aeronautics Administrator
- Mariah Johnson, Air Service Development Program Manager



The WY Airport System



40

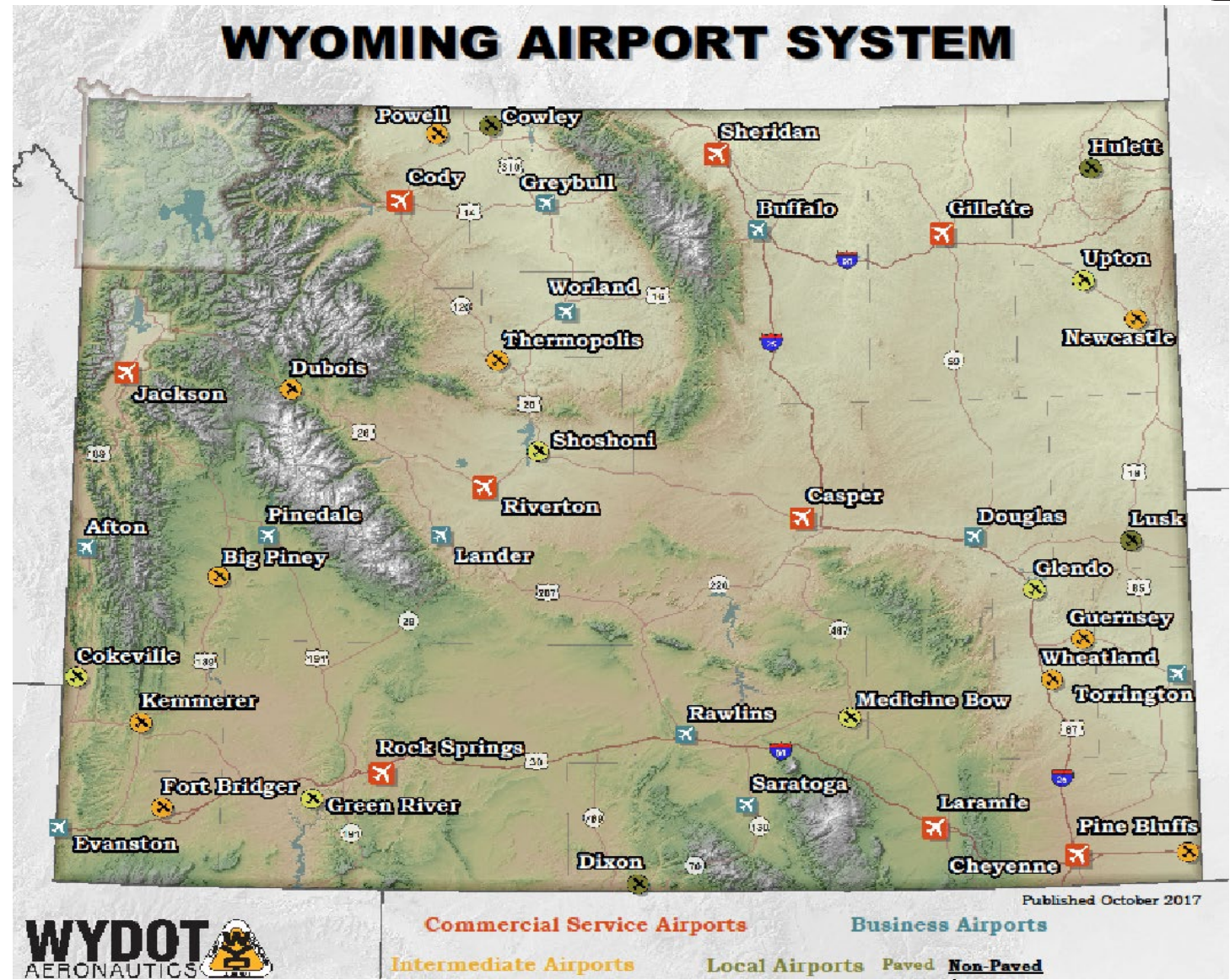
Public-Owned
Airports

9

Commercial
Airports

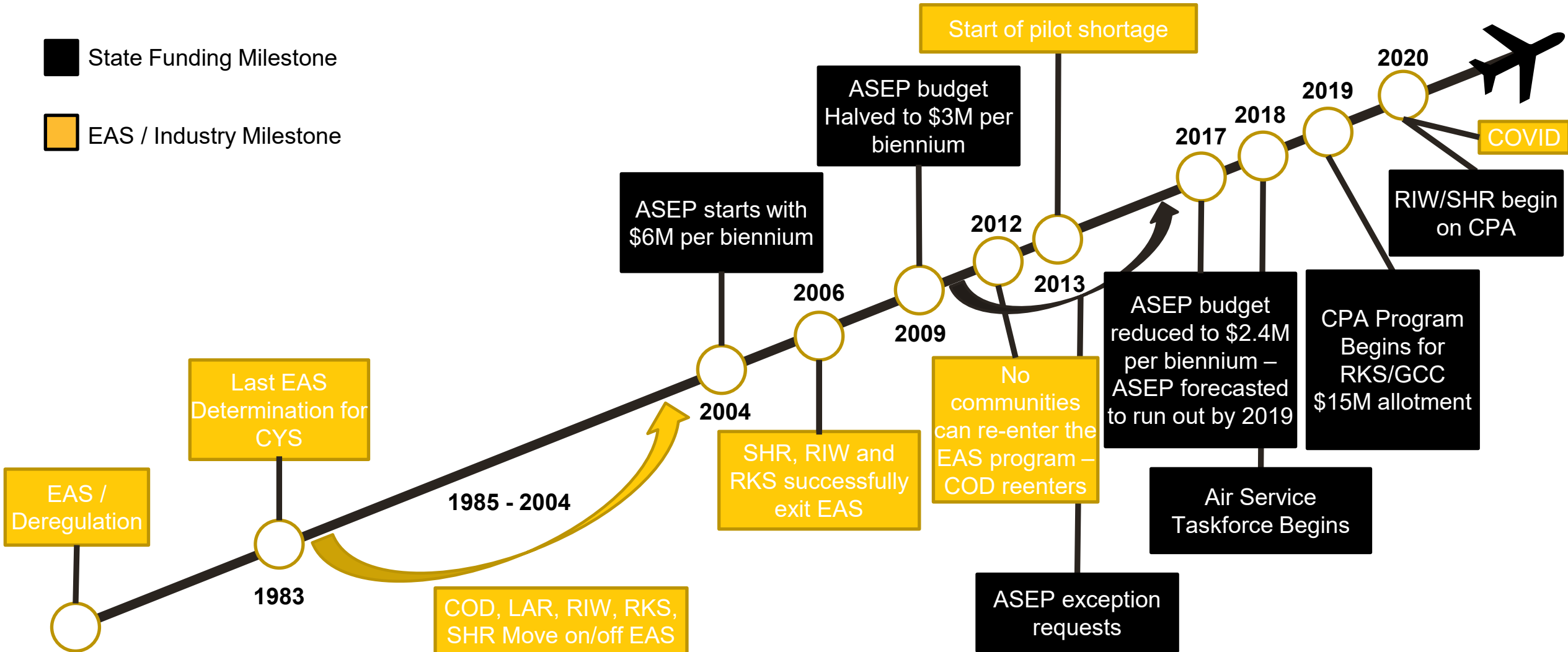
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General
Aviation
Airports



Historical Context

From Deregulation to Sustainability



Air Service Enhancement Program (ASEP)

Fiscal Year 2025 Grants (Year ending June 30, 2025)

FY 2025	Cheyenne Regional Airport (CYS)	Jackson Hole Airport (JAC)	Jackson Hole Airport (JAC)
Destination	Denver, CO	Atlanta, GA	Dallas/Fort Worth, TX
Airline	United Express Operated by SkyWest	Delta Airlines	American Airlines
Original Term	July 1, 2024-June 30, 2025	January 6, 2025 – March 30, 2025	December 20, 2024 - April 3, 2025
State Percent Match	60%	40%	40%
State Grant	\$1,200,000	\$72,000	\$80,000
State Dollars Expended	(\$843,242)	(\$69,350)	(\$80,000)
State Dollars Recovered	\$356,758	\$2,650	\$0
Local Dollars Expended	(\$505,945)	(\$104,025)	(\$120,000)
Local Percentage Match	40%	60%	60%
Passengers	56,321	19,287	41,069
State Cost/Passenger	\$14.97	\$3.60	\$1.95

Capacity Purchase Agreement (CPA)

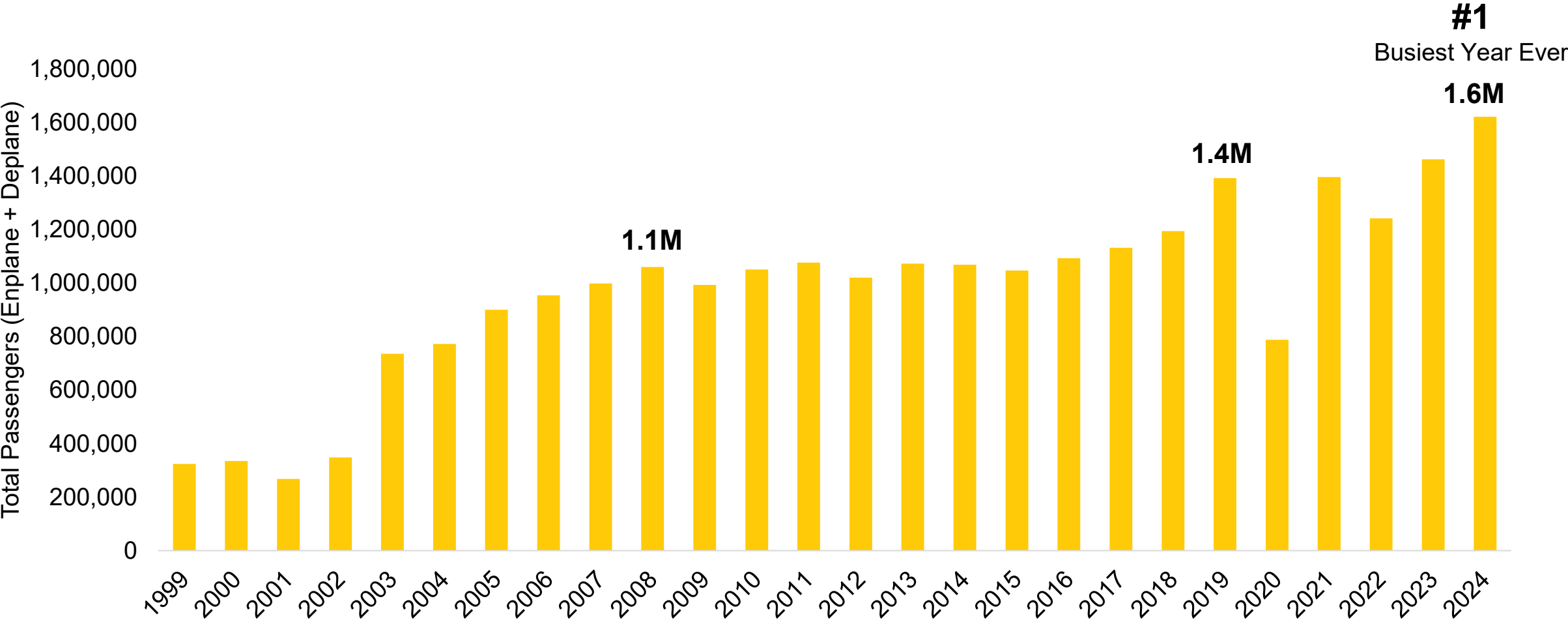
Fiscal Year 2025 Grants (Year ending June 30, 2025)

CPA FY 2025	Gillette - Northeast Wyoming Regional Airport (GCC)	Riverton - Central Wyoming Regional Airport (RIW)	Rock Springs - Southwest Wyoming Regional Airport (RKS)	Sheridan County Airport (SHR)
Term	July 1, 2024 - June 30, 2025	July 1, 2024 - June 30, 2025	July 1, 2024 - June 30, 2025	July 1, 2024 - June 30, 2025
State Percent Match	60%	60%	60%	60%
Contract Maximum (State Share)	\$1,894,445	\$2,479,744	\$2,645,291	\$1,936,418
State Dollars Expended	(\$1,103,989)	(\$2,479,744)	(\$2,645,291)	(\$1,396,453)
Unused State Dollars	\$790,456	\$0	\$0	\$539,965
Local Dollar Percentage Match	40%	40%	40%	40%
Local Dollar Match	\$735,992.52	\$1,653,163	\$1,763,528	\$930,968
Passengers	56,902	32,694	34,289	52,828
State Cost/Passenger	\$19.40	\$68.81	\$77.15	\$36.66

Commercial Air Service in WY

Continuing to set new records

Total Wyoming Passengers – Last 25 Years



#1
Busiest Year Ever

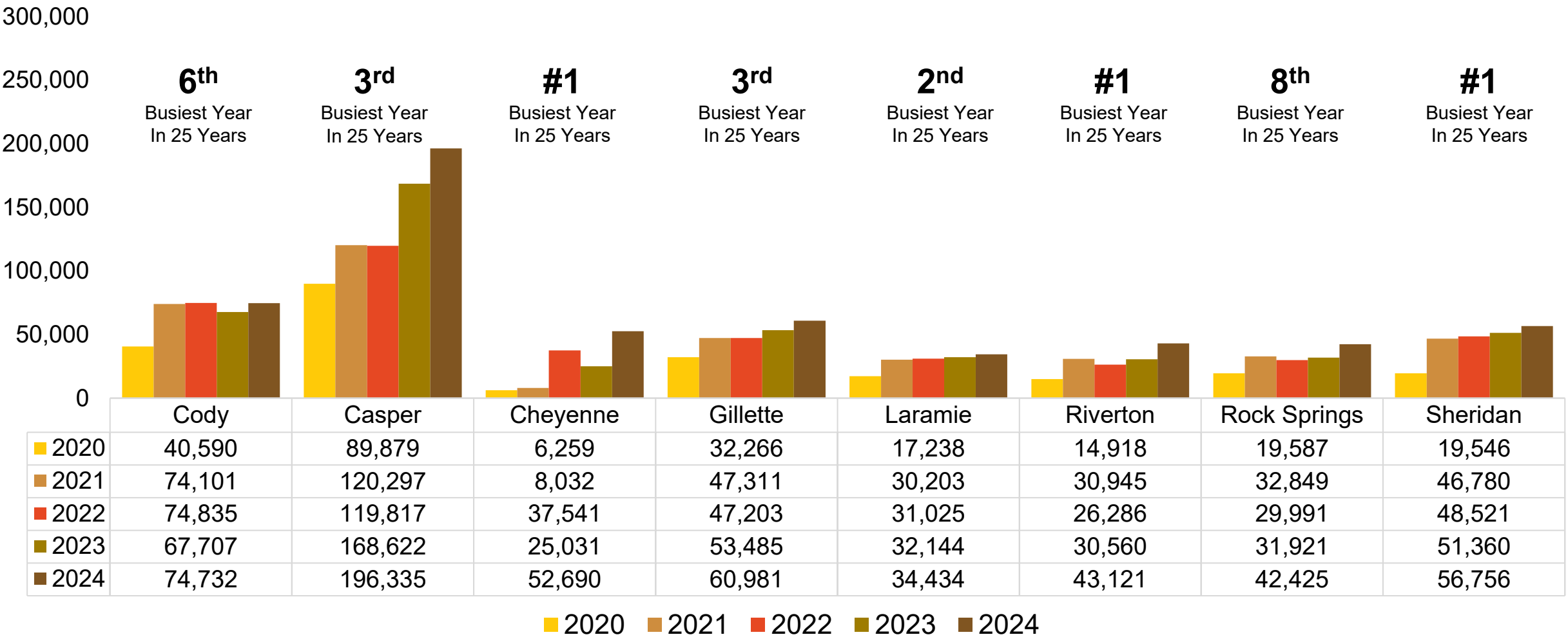
1.6M

Source: Monthly Airport Enplanement Reports



Commercial Air Service in WY

Continuing to set new records



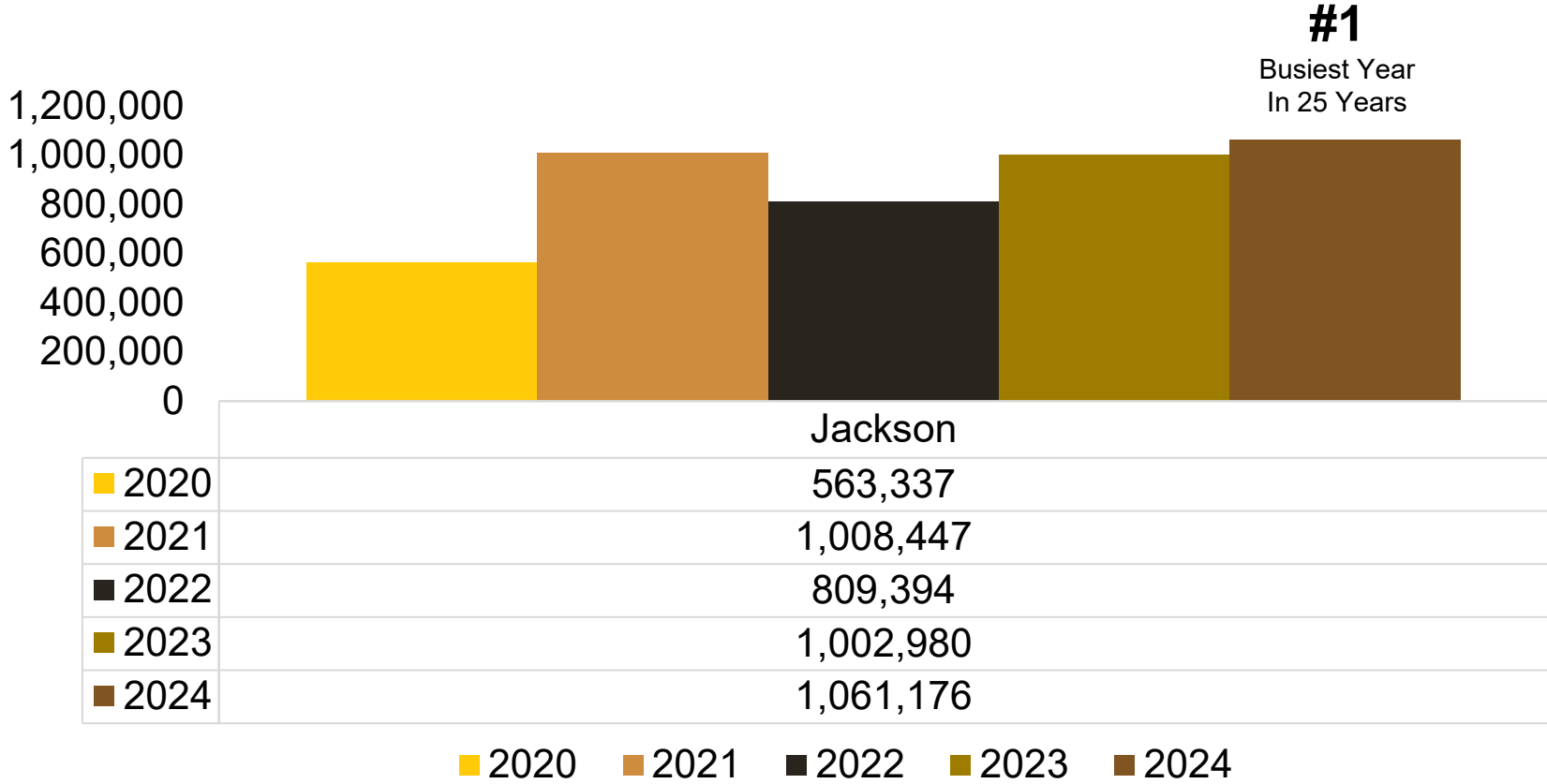
Source: Monthly Airport Enplanement Reports



Commercial Air Service in WY

Continuing to set new records

Jackson – Total Passengers



- Every Wyoming airport saw an increase in passengers in 2024 vs. 2023
- Overall, passengers increased by 11% over 2023, with most airports seeing a 10% or higher increase in passenger numbers

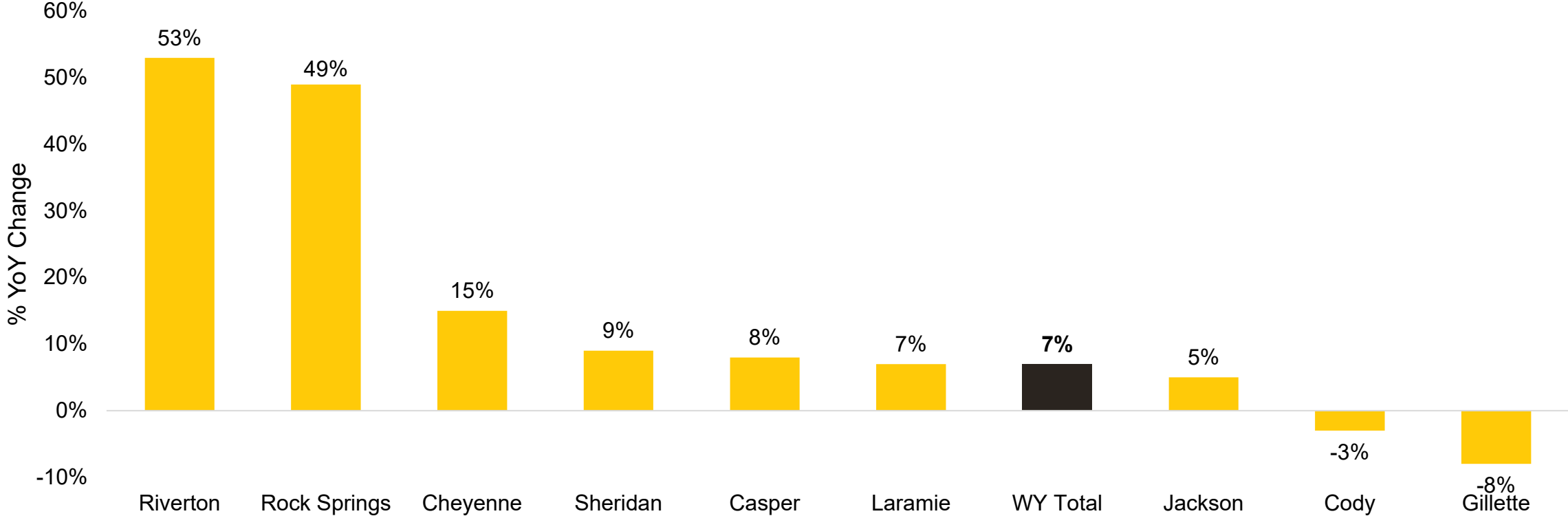
Source: Monthly Airport Enplanement Reports



Commercial Air Service in WY

Continuing to set new records

Percentage Change in Passengers 2025/2024
January - June

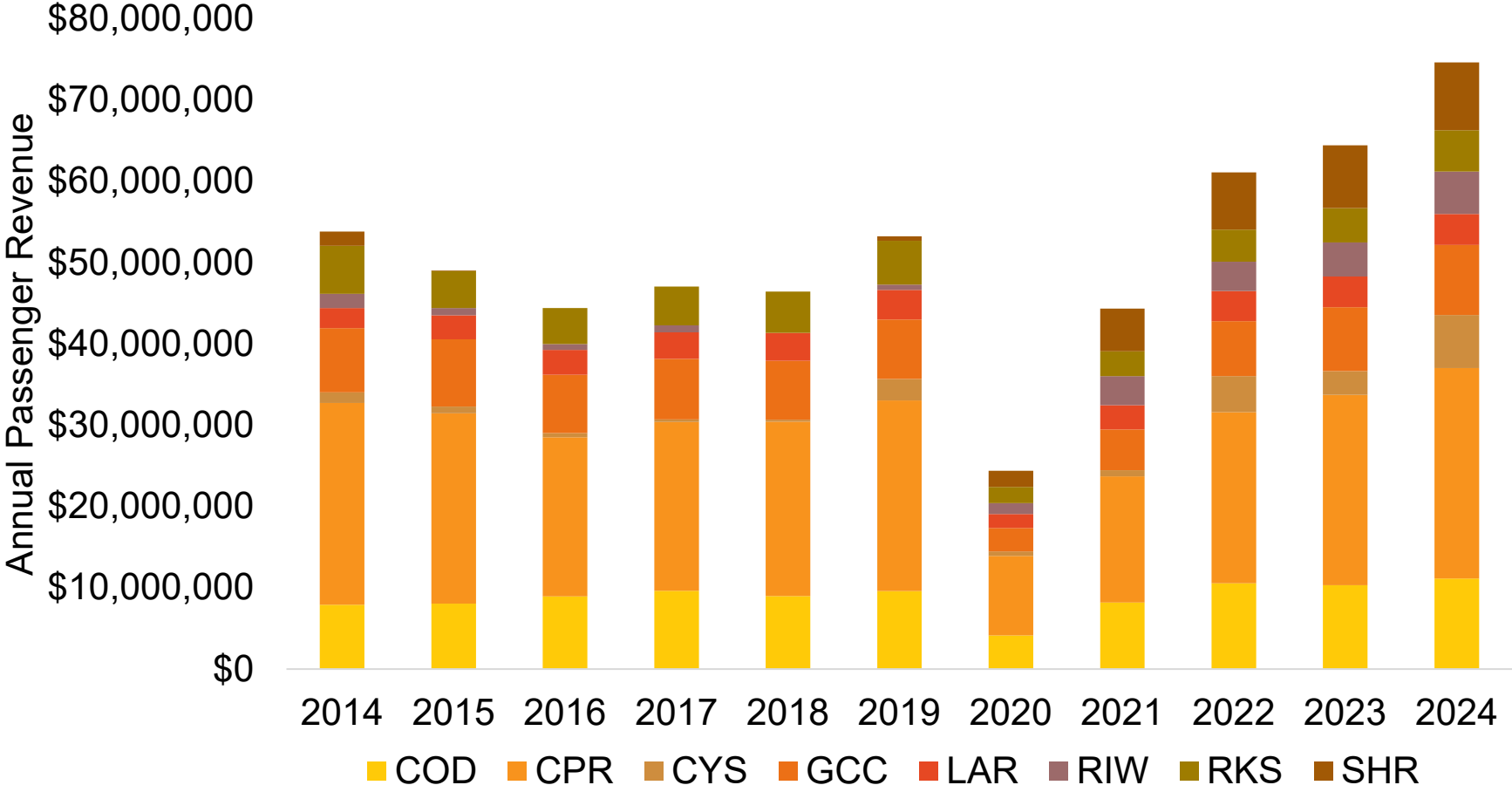


Source: Monthly Airport Enplanement Reports



Commercial Air Service in WY

WY Airport Revenue 2014 - 2024



- Total airline revenue in CPA markets (+CYS) increased 81% from 2014 and accounted for 90% of the total revenue growth

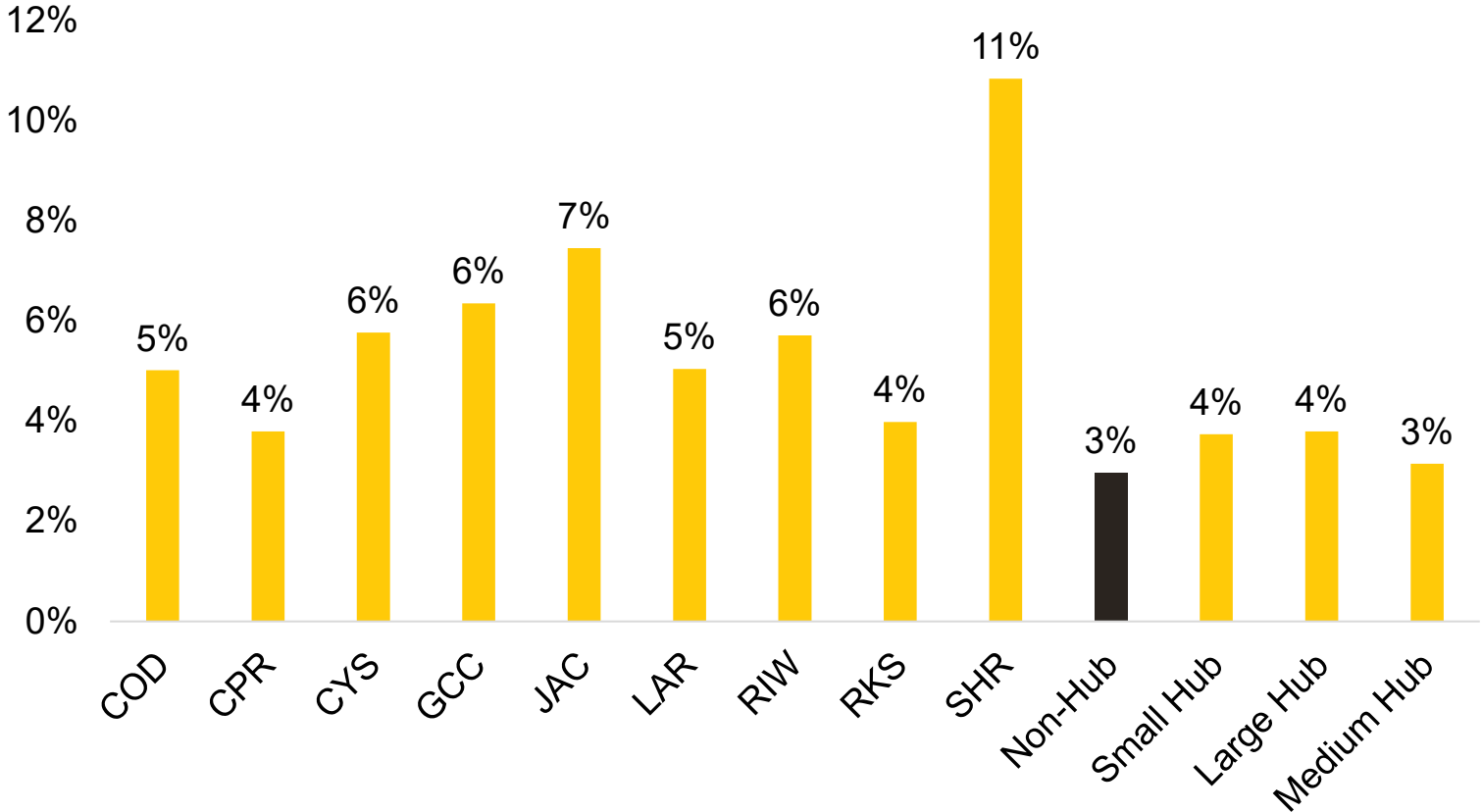
Source: US DOT O&D Survey
 Note: Excludes JAC



Commercial Air Service in WY

WY Airport Revenue Growth since 2005

Airline Revenue Compound Annual Growth (CAGR) 2005 - 2024



- Wyoming airport revenue growth is outpacing national averages

Source: US DOT O&D Survey



Wyoming Air Service Update

Trends of 2024

- Enplanement increases in Wyoming markets continue to outperform national averages.
 - Enplanements for the four CPA markets in 2024 grew 21% over 2023, more than five times the national average of 3.7% enplanement growth
- We continue to see the impacts of increased labor costs.
 - Block hour rates for the four CPA markets in 2024 were on average 25% higher than 2023.
- While costs have increased, we have not lost air service in our communities
 - More than 70 communities have lost service from a legacy carrier since 2019

Capacity Purchase Agreement

Fiscal Year 2025 and Beyond

- The last four-year term of the Capacity Purchase Agreement was recently renegotiated and took effect July 1, 2025.
 - Block hour rates for FY2026 did not increase
 - Cheyenne was added to the program
- The intent of the program has always been to build each community's market to a point where they would be able to exit the program.
- Beginning January 1, 2026, United Airlines will be taking over the service in Gillette and they will no longer need funding from the CPA.
- Even with the successful exit of Gillette, we anticipate funding will be exhausted by the end of FY2026.