



2013 WYOMING AIRPORTS
Economic Impact Study



ECONOMIC IMPACT
**Executive
Summary**

Study Overview

In late 2013, the Aeronautics Division of the Wyoming Department of Transportation (WYDOT) completed an important research project to investigate the value to the state from airports and airport supported services. This report provides a summary of the findings from the research.

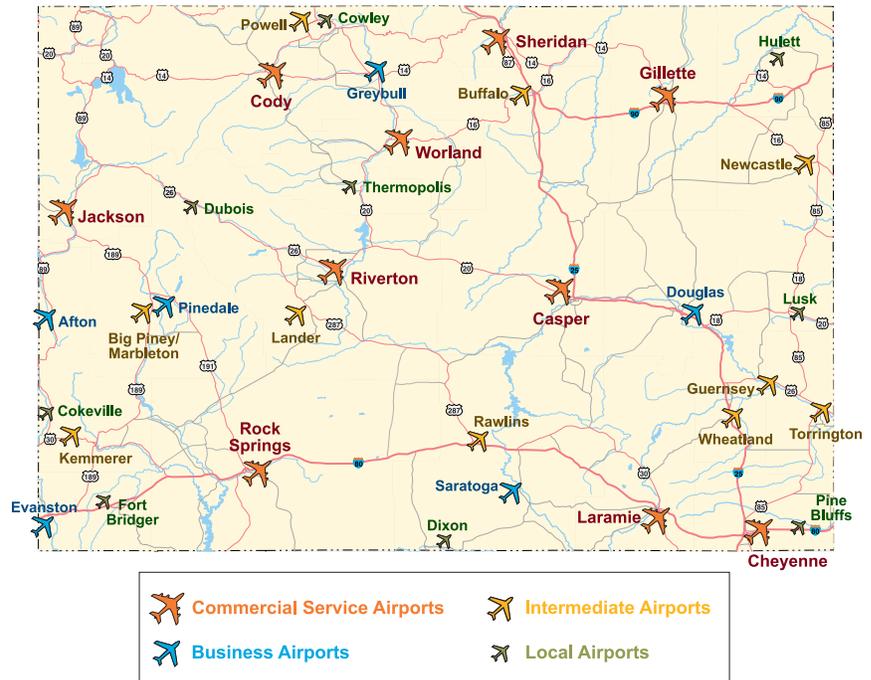
To determine potential benefits associated with the 35 public-use commercial and general aviation airports in Wyoming, outreach to each airport was completed. This outreach included:

- Surveys of 4,000 travelers using commercial and general aviation airports
- Direct mailings to 400 Wyoming businesses
- Contact with 30 statewide agencies and organizations
- Contact with 50 chambers of commerce and economic development groups
- Distribution of an online survey link via 40 media/news outlets

Results of the outreach clearly show that residents, businesses, and visitors do indeed benefit from Wyoming airports. A summary of the benefits identified follows:

- **Tourism** is vital to Wyoming's economy, and the state has hundreds of resorts, hotels, spas, guest ranches, camps, and outfitters that are heavily dependent on visitors who arrive by air.
- **Energy producers** rely on both general aviation and commercial airline service to support their operations and to monitor their power lines and pipelines from the air.
- Hundreds of different types of **businesses** use general aviation and commercial airline service to improve their efficiency and to attract and retain experienced employees.
- **Ranchers and farmers** use airports to monitor their herds, to fly in customers for auctions, and to support treatment of their crops for both pests and weeds with aerial applications.
- **Hospitals** transport patients by air in emergency situations and rely on airline service to attract experienced healthcare professionals.
- **Colleges** in Wyoming benefit from aviation to compete for and retain qualified faculty and to expand their market reach for U.S. and international students.

Study Airports



- **Federal, state, and county agencies** rely on airports to oversee millions of acres of wildlife habitat, agricultural areas, forests, and grasslands via aerial inspections.
- Airports support **forest firefighting**, allowing aircraft to effectively load and re-load with fire retarding chemicals when fires are active.
- **Healthcare** is improved by doctors who use general aviation planes to expand the reach of their services within the state.

Once it was determined that airports and aviation are contributors to Wyoming, additional research was completed to quantify specific economic impacts that are supported by study airports. The research project also measured local and state tax revenues that are tied to airports and documented other airport benefits.

Information from the research project completed by the Aeronautics Division shows that aviation plays an essential role in supporting Wyoming's \$3.1 billion a year tourism industry. Data from the project also shows that aviation plays an important role in supporting Wyoming's energy and mining industries, which account for more than 26,000 jobs for Wyoming residents.

Findings

Wyoming's statewide economic impact study determined that when all activities are considered, the 35 study airports support the following:

Jobs related to airport management, airport tenants, capital investment at airports, and visitor spending

12,268



Annual payroll associated with these jobs

\$526.4 million



Annual economic activity or output associated with airport and visitor related spending

\$1.4 billion



Additional jobs in Wyoming that gain efficiency by using aviation

38,100



Annual local and state aviation tax revenues

\$55 million



Approach

The remainder of this summary provides an overview of the approach used to complete the economic impact research project. This summary focuses on combined total statewide economic impacts for all study airports. More information on economic impacts for each Wyoming airport is available in the study's technical report.

In order to estimate statewide and airport specific economic impacts, initial or direct economic activities considered in the research project were divided into on-airport and off-airport categories. On-airport economic impacts are associated with:

- Airport administrative functions
- Airport tenants or businesses that provide aviation services or support airport customers
- Local, state, and federal capital investment to maintain and improve airports

Off-airport impacts are associated with spending by visitors who arrive in Wyoming on either general aviation planes or scheduled commercial airline flights. When visitors come to Wyoming by air, they often have expenditures for hotels, food, transportation, retail, entertainment, and recreation. Most visitor-related spending takes place off-airport.

Sources of Economic Impact

Initial Impacts

On-Airport Related Activities

- Administration, Maintenance, Operation
- Aviation-Related Tenants/Businesses
- Investment for Capital Improvements

Initial Impacts

Off-Airport Visitor Spending

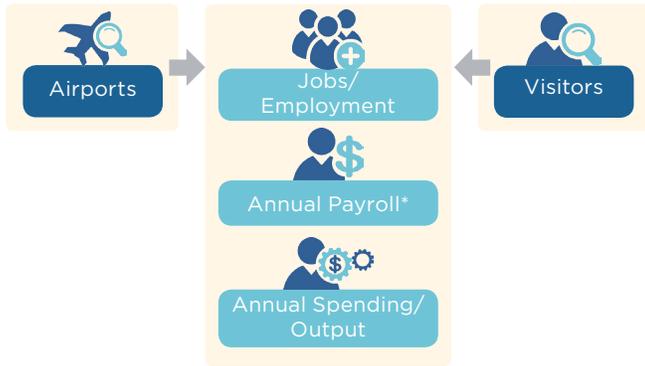
- Visitors arriving on Commercial Airlines and General Aviation Planes



Methodology

To support this project’s methodology, economic impacts were estimated using three indicators: jobs, annual payroll associated with these jobs, and total annual economic activity or output.

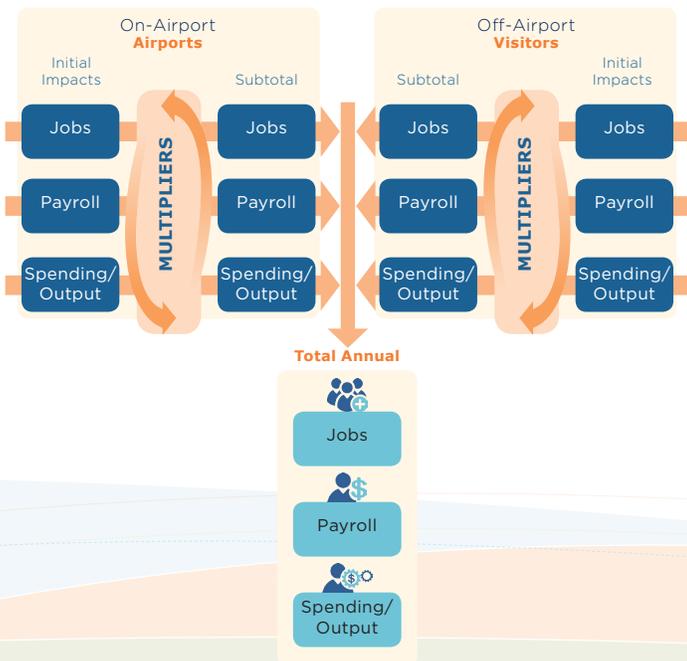
Economic Impact Measures



*Payroll includes wages and benefits

Once “initial” or direct impacts in each of the three measurement categories (jobs, payroll, and output) enter the economy, they generate successive waves of additional economic activity. These secondary impacts are categorized in this study as “multiplier” impacts. For each airport, the sum of initial and multiplier impacts equals total annual economic impact, as illustrated below:

Total Impacts: Sum of Initial and Multiplier Impacts



Data to estimate initial impacts, both on- and off-airport, were obtained from study airports, airport tenants, departing visitors, the Wyoming Aeronautics Division, and the Federal Aviation Administration. The IMPLAN (Impact Analysis for Planning) input/output model, an economic impact software program, was used to estimate multiplier impacts. IMPLAN contains information that is specific to Wyoming and to each county in Wyoming which helps to estimate the number of times initial impacts, both on- and off-airport, for employment, payroll and output re-circulate in either the state or local economy.

For this project, both a state model and county-based models were used to estimate total annual economic impacts. Results from the state model show the cumulative impacts of all airports on Wyoming’s economy. The county-based models show each airport’s impact on the economy of its local market area.

Each airport’s total impact on the state economy is greater than its impact on just the economy of its local market area. All state totals discussed in this summary were estimated using the state model. Total annual economic impacts for all airports, both state and local, are shown at the end of this summary.

! *IMPLAN (Impact analysis for PLANning) is a widely used input/output model that is FAA-approved for estimating airport economic impacts. Statewide or local multipliers in the model provide a numeric way to measure secondary economic impacts on the economy. A multiplier for jobs of 1.3 indicates that for every 10 initial jobs, 3 multiplier jobs in different industries are supported for a total of 13 jobs. (10 initial jobs x 1.3 = 13 total jobs).*

Total Annual Statewide Economic Impacts

Airport Administration, Operation, and Maintenance

Each of the 35 airports have jobs dedicated to running the airport. For larger airports, jobs in the airport administration, operation, and maintenance category are most often on the airport and are typically full-time positions. Smaller airports often have management functions that are not located at the airport, and positions that support airport operations are more often part-time.

Most airports included in this study are owned by a public entity such as a city or a county. It is often typical for airports to have employees that are not full-time to provide services in areas such as human resources, legal, and other administrative functions. This project considered both on- and off-airport employees that are engaged in the administration, operation, and maintenance of the airports. For this analysis, the number of hours worked or the seasonality of certain airport related jobs was used to convert part-time positions to full-time equivalent jobs.

Information to estimate employment, payroll, and output in this category was obtained directly from each of the study airports. When initial impacts are entered into the state model, total annual economic impacts in the airport administration, operation, and maintenance category were estimated as shown on the right.

Jobs

283



Annual Payroll

\$13.7 million



Annual Output

\$46.4 million



! *Research indicated that some jobs associated with airport administration are part-time in nature. For this economic impact analysis, part-time jobs were converted to full-time equivalent (FTE) positions. For example, if a city employee in human resources works 20% of the time to support the airport, an employee in legal services works 5% of the time to support the airport, and an employee in maintenance works 75% of the time to support the airport, these three part-time positions equal one full-time equivalent position.*



Total Annual Statewide Economic Impacts

Airport Tenants/Businesses

Jobs

2,388



Annual Payroll

\$151.1 million



Annual Output

\$463.2 million



Some but not all study airports have tenants or businesses that provide aviation services or support for airport customers. Examples of some airport tenants considered in this research include fixed base operators (FBOs), flight instructors, airlines, terminal concessionaires, agricultural sprayers, and rental car companies. Statewide there are 145 airport tenants that were included in this analysis.

Not all jobs supported by airport tenants are full-time in nature. Part-time jobs in this category were also converted to full-time positions based either on the seasonality of the job or the number of hours the part-time employee works in direct support of an airport tenant.

Information to estimate annual economic impacts supported by airport tenants/businesses was obtained most often from the tenants themselves. In some cases, additional tenant information was supplied by airport management or was obtained through secondary data sources. Using the state model, annual economic impacts were estimated for all aviation related tenants and are shown on the left. These impacts include all initial and multiplier impacts.

! *Tenants at some Wyoming airports report that during busy seasons they may hire additional employees. For example, if a tenant hired 4 additional employees who worked full-time for 6 months, these 4 seasonal jobs would equal 2 full-time equivalent positions.*



Total Annual Statewide Economic Impacts

Capital Investment

Each year, federal, state, local, and private funds are invested to improve, expand, and maintain Wyoming airports. While capital projects are being planned and implemented, they provide additional economic impacts related to jobs that are required to implement the project, the payroll associated with these jobs, and the spending that is required to purchase the goods and supplies needed for the project.

For this study, the Aeronautics Division provided historical capital investment for each of the airports. This investment represents FAA, WYDOT, and local funds. A multi-year history was used to develop an estimate of average annual capital investment for each airport. Once annual investment was estimated, the IMPLAN model was used to translate this spending (output) into the number of jobs the investment supports and the annual payroll associated with these jobs.

Initial average annual FAA, WYDOT, and local investment in all study airports is estimated at **\$41.3 million**. With initial and multiplier impacts, this spending supports **305 jobs**, **\$17.5 million in payroll** and **\$61 million in total economic activity or output**.

In addition to FAA, WYDOT, and local investment, the **Wyoming Business Council** also has a program that funds various economic development related projects at study airports. The Council has provided a total of **\$23.3 million in grants** to Wyoming airports. When these initial impacts are added with multiplier impacts, over the past 10 years, all airport related investment from the Wyoming Business Council has supported **297 jobs**, **\$14.3 million in annual payroll**, and **\$35.1 million in annual output**.

On an average annual basis, statewide economic impacts from FAA, WYDOT and local capital investment are experienced as shown on the right. Total impacts include both initial and multiplier impacts. These economic impacts for capital investment shown here do not include private investment.

Jobs

305



Annual Payroll

\$17.5 million



Annual Output

\$61 million



! *IMPLAN provides ratios for translating capital investment related spending into the number of jobs supported by the spending. IMPLAN ratios, for example, may show that for every \$1 million in capital investment, 10 jobs are supported in areas such as planning, engineering, and construction. If an airport's average annual capital investment is estimated at \$700,000, 7 initial jobs would be supported by this investment. (10 jobs per \$1 million x \$700,000 = \$7,000,000/\$1,000,000 = 7 jobs supported by initial capital investment).*



Total Annual Statewide Economic Impacts

Commercial Visitor Spending

Jobs

8,438



Annual Payroll

\$318 million



Annual Output

\$747.6 million



There are 10 airports that have regularly scheduled flights from commercial airlines. Travelers who use commercial airline flights are a mixture of residents and visitors. Information from the airports and United States Department of Transportation (USDOT) records indicate that an estimated **374,326 visitors** arrived in Wyoming for the most recent calendar year on commercial airline flights.

While in Wyoming, these visitors have expenditures for lodging, food, local transportation, retail purchases, entertainment, recreation and other items. Over a 10-month period, the commercial airports distributed surveys to their passengers to collect data on each airport's specific patterns for visitor expenditures.

Using information from passenger surveys, supplemented with data from convention and visitors bureaus, this study estimates that all commercial airline visitors spend an estimated **\$547.2 million** annually. For this impact category, initial visitor spending is essentially equal to output. Similar to spending related to capital investment, the IMPLAN model contains information that is specific to Wyoming that was used to determine how many jobs are supported by visitor spending. Most of the visitor supported jobs are in service industries; data in the model was also used to estimate annual payroll associated with these jobs.

Annual statewide economic impacts (initial and multiplier) associated with visitors who arrive on commercial airlines are shown to the left.

! Surveys of commercial airline passengers, completed as part of the research project, collected information from visitors on their trip purpose and their average length of stay. Results from the surveys show that an estimated **34%** of the visitors who fly on a commercial airline flight are traveling for business, **49%** are traveling for pleasure, and the remaining **17%** are traveling for other reasons. The average commercial visitor spends **about 4 days** in Wyoming.



Total Annual Statewide Economic Impacts

General Aviation Visitor Spending

Visitors also arrive on various types of general aviation planes. Each airport supplied information on their average weekly visiting general aviation aircraft, the fleet mix for these aircraft, and the average number of arriving passengers and pilots per plane. The information provided by each airport was reviewed by the FAA and staff from the Aeronautics Division and was ultimately used to establish an estimate of annual general aviation visitors for each airport.

This study estimates that **148,582 visitors** arrive annually in Wyoming on general aviation aircraft. Similar to commercial airline visitors, general aviation visitors have spending in various categories during their stay in the state. With the assistance of 36 fixed base operators and/or airports, surveys were distributed to general aviation visitors to collect information on their spending patterns.

While commercial airline visitors to Wyoming almost always spend at least one night in the state, for visitors arriving on general aviation aircraft, many stay only for the day. Based on survey returns, it is estimated that **54%** of Wyoming's general aviation visitors who are traveling for business and **21%** of all leisure related general aviation visitors stay only for the day. Therefore, these visitors have no expenditures for lodging and their expenditures in other categories are also more limited.

On a statewide basis, it is estimated that visitors who arrive on general aviation aircraft spend an estimated **\$49.5 million** annually; this initial spending is essentially equal to output. Information in the IMPLAN model was used to determine the number of jobs and associated annual payroll that is supported by general aviation visitor spending.

Statewide annual economic impacts (initial and multiplier) associated with visitors who arrive on general aviation aircraft were estimated as shown to the right.

Jobs

855



Annual Payroll

\$26.1 million



Annual Output

\$71.2 million



! *This study's research showed that spending by general aviation visitors on a per trip basis varied by airport and was influenced by the type of community/area and activities that each airport serves. General aviation airports that serve bigger cities tend to have visitors that stay for a longer period of time, and a higher percentage of the spending by these visitors is for lodging. For smaller airports, visitor stays are shorter and there are fewer opportunities to spend money for lodging and local transportation.*

Total Annual Statewide Tax Revenues

Aviation Related Taxable Activities

For this research project, aviation related local and state tax revenue contributions were estimated for the following:

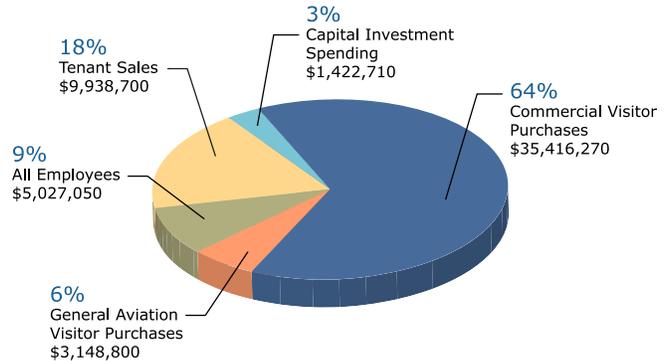
- Business taxes collected at airports that are attributed to **tenants** that collect tax and distribute their collections to appropriated government agencies.
- Taxes associated with the purchases of goods and services to support airport related **capital improvement projects**.
- Taxes associated with air **visitor expenditures** which take place primarily at locations not at the airports; these tax revenues are associated with visitors arriving on commercial airlines and general aviation planes.
- Sales tax paid by **employees** supported by airports, tenants, capital improvement projects, or air visitor spending.

Tax revenues identified in this analysis are those associated only with initial or direct jobs, payroll, and output. There are other tax events that are associated with multiplier impacts estimated in this study, but to provide a conservative approach to estimating aviation related tax benefits in Wyoming, these additional tax impacts were not estimated. Tax revenue estimates considered 9,742 direct or initial employees whose jobs are supported by airports and aviation activities, approximately \$597 million in initial air visitor spending, and an estimated \$41.3 million in initial average annual capital spending for all airports.

Aviation related state and local tax revenue estimates follow:

- Tenants located at airports paid an estimated \$9.9 million in business sales tax.
- Capital investment at Wyoming airports resulted in \$1.4 million in taxes on purchases within the state.
- Visitors arriving in Wyoming on commercial airline flights paid an estimated \$35.4 million in sales tax on items they purchased in the state.
- Visitors arriving on general aviation aircraft paid an estimated \$3.2 million in sales tax on items they purchased.

Distribution of Aviation Related Tax Revenues



- Employees who work at airports, for airport tenants, on construction projects, or in establishments supported by air visitor spending contributed an estimated \$5 million in annual sales tax revenues.

On an annual basis, it is estimated that the airports and the activities they support contribute a total of **\$55 million** to state and local tax revenues in Wyoming.

! Sales tax collected on purchases made by visitors to Wyoming who arrive on commercial airline flights is the largest contributor to all state and local aviation related tax revenues. These revenues account for 64% of total annual aviation related tax revenues estimated in this analysis.

Aviation Benefits

Wyoming Businesses, Agencies and Organizations

As part of this project, airports, airport tenants, and airport customers were interviewed to determine if and how communities benefit from airports in Wyoming. Results from these contacts led to outreach with members of chambers of commerce, economic development groups, individual businesses throughout the state, as well as with the members of most state agencies, organizations, and associations. This outreach was accomplished through an online survey, and WYDOT's Public Affairs Office assisted with statewide press releases. The scope of the outreach enabled many businesses, agencies, and organizations in Wyoming who benefit from one or more of the airports to provide direct input into the research project.

From responses to the online survey, it is estimated that there are approximately **38,100 non-aviation jobs** in Wyoming that benefit from improved efficiency by using the airports. These jobs are in addition to those previously estimated for on-airport and off-airport jobs supported directly by the study airports and visitor spending.

For all businesses responding to the survey, **over 90%** of all survey respondents rely on commercial airline service, **over 30%** rely on general aviation, and **over 90%** rely on overnight shipping or air cargo to support their activities on a weekly basis.

As it relates to their efforts to attract new businesses, several economic development groups reported how important it is to have an airport that can accommodate corporate general aviation aircraft and/or scheduled commercial airline service. Each day, dozens of businesses depend upon airports for their travel needs as well as the travel needs of their customers and suppliers. Businesses in Wyoming compete for employees with companies located throughout the U.S. Wyoming businesses noted how important commercial airline service is to their ability to attract and retain qualified employees. Without airline service, many businesses believe that they would not be able to successfully recruit the best available employees to Wyoming.

Proximity to commercial and general aviation airports is important to employers in Wyoming. Businesses participating in the research project were asked to rank the importance of 13 factors as they relate to their location in Wyoming. Among these 13 factors, proximity to a commercial airport tied for first along with convenient highway access, as being the most important factor related to the location of their business. Businesses ranked proximity to a general aviation airport as being the 4th most important factor.



Airport Stories



Extensive outreach to organizations, agencies, and businesses was undertaken for this project. This outreach identified hundreds of local and visiting businesses that depend on Wyoming's commercial and general aviation airports. The majority of business users are engaged in energy, mining, or chemical related industries. Numerous resorts and outfitters that rely extensively on Wyoming airports were also

identified. Many of the visitors who support these employers arrive by air. More information on specific users for each airport is provided in this study's technical report which is available on the Aeronautics Division website: www.dot.state.wy.us/home/aeronautics.html. This section summarizes some of the airport users identified during the research effort.

Many **hospitals** in Wyoming rely on airports to transport patients by air in emergency situations, to bring in specialty doctors, and to improve healthcare for residents. Hospitals also report that airports are important to their ability to attract and retain healthcare professionals. Research efforts identified the following medical facilities that report they depend on airports: Mountain View Regional Hospital (Casper/Natrona County International); West Park Hospital and Yellowstone Behavioral Health Center (Yellowstone Regional); Ivinson Memorial Hospital (Laramie Regional); Riverton Memorial Hospital

(Riverton Regional); St. John's Medical Center (Jackson Hole); Memorial Hospital of Sweetwater County (Rock Springs-Sweetwater County); Sheridan Veterans Administration Medical Center (Sheridan County); Washakie Health Clinic (Worland Municipal); Star Valley Medical Center (Afton Municipal); Evanston Regional Hospital (Evanston-Uinta County Burns Field); South Big Horn County Hospital (South Big Horn County); Platte Valley Medical Center (Shively Field); Johnson County Health Center (Johnson County); Lander Regional Hospital (Hunt Field); Pinedale Medical Clinic (Ralph Wenz Field); Memorial Hospital of Carbon County (Rawlins Municipal-Harvey Field); Weston County Health Services (Mondell Field); Powell Valley Healthcare (Powell Municipal); Platte County Memorial Hospital (Phifer Airfield); Cokeville Medical Clinic (Cokeville Municipal); Hulett Medical Clinic (Hulett Municipal); and Hot Springs County Memorial Hospital (Hot Springs County-Thermopolis Municipal).

Airports in Wyoming also enable **specialty doctors** to fly to airports to visit with patients, and they typically use general aviation aircraft. Examples of these healthcare providers include: Premier Bone and Joint (Laramie, WY); Wyoming Physical Therapy (Cheyenne, WY); Wyoming Spine and Neurosurgery Associates, LLC (Cheyenne, WY); Rocky Mountain Retina Consultants (Salt Lake City, UT); Peak Vision Eye Surgery (Rock Springs, WY); and the Oregon Trail Eye Center (Scottsbluff, NE). According to study research, doctors fly to airports serving the following communities: Casper, Cheyenne, Gillette, Wheatland, Powell, Hulett, Pine Bluffs, Thermopolis, Torrington, Afton, Greybull, Pinedale, Lander, Rock Springs, Riverton, Rawlins, and Douglas.



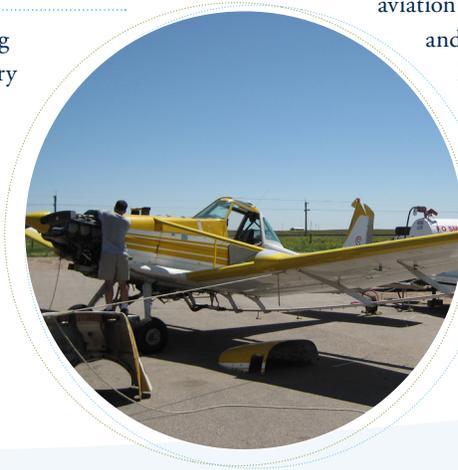


Forest fires can threaten and destroy homes, businesses, and property. In the worst case scenario, lives can even be lost. Several Wyoming airports are utilized to support **forest firefighting** activities. Activities supported by airports vary, but the common thread is that airports that support aerial firefighting activities provide pilots with

locations to land and take off with fire retarding chemicals. The following airports were identified as primary supporters for fighting forest fires in Wyoming: Casper/Natrona County International; Sheridan County; Worland Municipal; Shively Field; Hunt Field; Mondell Field; Dixon; and Dubois Municipal.

Many **colleges** in Wyoming benefit from the use of airports. Airline service enables colleges to attract students not only from all over the U.S. but also from international locations. The University of Wyoming is engaged in cutting edge weather research using general aviation aircraft. Casper College and Northwest College also use study airports for their pilot training program. Educational institutions all agree that air service to Wyoming is essential to their ability to recruit and maintain quality faculty members. Colleges in Wyoming that report they regularly rely on airports include: Casper College (Casper/Natrona County International); Northwest College (Yellowstone Regional); University of Wyoming (Laramie Regional); Wyoming Catholic College and Central Wyoming College (Riverton Regional); Western Wyoming Community College (Rock Springs-Sweetwater County); Sheridan College (Sheridan County); and Wyoming Catholic College (Hunt Field).

Both **ranchers and farmers** in Wyoming benefit from aviation. Wyoming's primary crops, alfalfa and sugar beets, benefit from aerial applications to treat both pests and weeds. Livestock producers often use aviation to monitor their herds or to locate lost cattle. When they hold auctions, these businesses attract customers who arrive by air from various locations in the U.S.



Some airports that report they support agricultural activities include: Camp Guernsey, Powell Municipal, Torrington Municipal, Sheridan County, Phifer Airfield, Converse County, Cokeville Municipal, North Big Horn County, Dixon, Fort Bridger, and Pine Bluffs Municipal.

Many **federal, state, and county agencies** rely on Wyoming's airports. Some of these agencies include the Bureau of Land Management, Wyoming Game and Fish, the U.S. Forest Service, and the U.S. Department of Agriculture. These groups have the responsibility for overseeing millions of acres of wildlife habitat, agricultural areas, forests, and grasslands in Wyoming. They all rely extensively on aerial inspections to carry out their responsibilities. These agencies report they use airports on almost a daily basis. Some of these include the airports serving Casper, Rock Springs, Afton, Douglas, Greybull, Pinedale, Saratoga, Big Piney, Buffalo, Kemmerer, Lander, New Castle, Powell, Rawlins, Dixon, Dubois, Fort Bridger, Hulett, Pine Bluffs, and Thermopolis.

Large and small businesses in Wyoming rely on aviation. Many employers report they use general aviation aircraft and scheduled commercial airline flights to support their operations and improve their efficiency. When Wyoming employees use aviation for business travel they reduce travel time and cut the number of days they are on the road.

Examples of some of the larger employers that report using Wyoming airports on a regular basis include: Halliburton, Schlumberger, Marathon Oil Corporation, Arch Coal, Inc., Peabody Energy, Cloud Peak Energy, Trihydro, National Outdoor Leadership School, J.R. Simplot Company, Sinclair Oil Corporation, and Basin Electric Power Cooperative.



Summary

Wyoming’s Annual Aviation Related Economic Impacts

There are an estimated **38,100 non-aviation jobs** in Wyoming whose efficiency is improved on a routine basis through their use of airports. When these jobs are combined with the **12,268 jobs** that are supported by airport management, airport tenants, capital investment, and visitor spending, an estimated **13%** of all employment in Wyoming is in some way supported by the airports considered in this study.

The **12,268 jobs** supported by airport management, airport tenants, capital investment projects, and visitor spending have an estimated total annual payroll of **\$526.4 million**. Total annual economic activity or output from on-airport activities and off-airport visitor spending is estimated at **\$1.4 billion**. This annual output represents approximately **3.6%** of Wyoming’s annual Gross State Product.

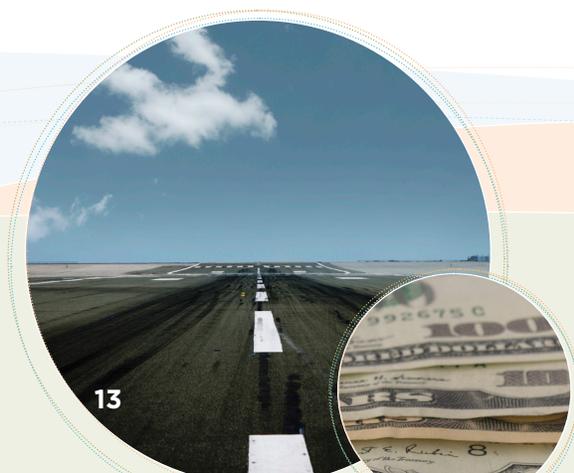
Annually, airports and the activities they support clearly make a notable contribution to the state’s economy and to local economies throughout Wyoming. Airports are important tools used to support a wide variety of businesses in the state. Other vital services supported at study airports help to improve the quality of life for all residents. By investing to maintain and improve the airports and by supporting Wyoming’s commercial airline service, the annual economic impacts documented in this study will continue to be realized in future reporting cycles.

More information on statewide or airport specific economic impacts is available in the full technical report which is on the Aeronautics Division website: www.dot.state.wy.us/home/aeronautics.html.

Summary of Wyoming’s Total Annual Statewide Aviation Economic Impacts

	INITIAL IMPACTS	MULTIPLIER IMPACTS	TOTAL IMPACTS
Jobs			
On-Airport Activities	1,974	1,002	2,976
Off-Airport Visitor Spending	7,768	1,524	9,292
Subtotal	9,742	2,526	12,268
Payroll			
On-Airport Activities	\$135.7 million	\$46.5 million	\$182.3 million
Off-Airport Visitor Spending	\$246.9 million	\$97.2 million	\$344.1 million
Subtotal	\$382.6 million	\$143.7 million	\$526.4 million
Output			
On-Airport Activities	\$386.6 million	\$183.9 million	\$570.6 million
Off-Airport Visitor Spending	\$596.7 million	\$222 million	\$818.8 million
Subtotal	\$983.3 million	\$405.9 million	\$1.4 billion

Note: All numbers in the table have been rounded. As a result, individual cells may not sum to the total shown.



Total Annual Economic Impact for Each Study Airport

Each of the airports included in this study help to support state and local economic impacts. Total annual employment, payroll, and output economic impacts for each airport are shown here. These impacts include all initial impacts plus multiplier impacts.

Models used to estimate the local airport economic impacts shown here are specific to the economic setting of each individual airport. State impacts reflect each airport's total impact on the state economy and were estimated with the state model.

AIRPORT NAME	EMPLOYMENT		TOTAL ANNUAL PAYROLL		TOTAL ANNUAL OUTPUT	
	Local	State	Local	State	Local	State
Commercial Service Airports						
Casper/Natrona County International Airport	981	1,002	\$37,239,080	\$38,651,780	\$107,540,720	\$123,272,380
Cheyenne Regional Airport-Jerry Olson Field	1,006	1,014	\$82,624,400	\$83,097,020	\$156,749,770	\$160,184,810
Gillette-Campbell County Airport	287	300	\$8,281,340	\$9,167,740	\$28,383,520	\$33,122,920
Jackson Hole Airport	7,967	8,032	\$325,251,610	\$329,319,640	\$775,241,370	\$793,937,630
Laramie Regional Airport	175	188	\$5,470,280	\$6,353,650	\$28,031,510	\$36,824,300
Riverton Regional Airport	154	157	\$4,839,360	\$5,062,950	\$16,622,120	\$18,591,570
Rock Springs-Sweetwater County Airport	261	267	\$8,785,970	\$9,211,070	\$27,115,220	\$31,244,000
Sheridan County Airport	335	350	\$13,959,430	\$14,940,270	\$47,098,320	\$58,192,530
Worland Municipal Airport	74	80	\$2,784,780	\$3,205,880	\$11,562,280	\$15,206,500
Yellowstone Regional Airport	460	467	\$12,449,480	\$12,947,290	\$42,233,850	\$45,324,630
STATE TOTAL		11,858		\$511,957,290		\$1,315,901,260
Business Airports						
Afton Municipal Airport	77	78	\$1,998,980	\$2,079,320	\$12,965,710	\$13,303,280
Converse County Airport	14	15	\$443,810	\$528,980	\$1,678,290	\$2,271,580
Evanston-Uinta County Airport-Burns Field	14	15	\$437,430	\$468,850	\$2,037,690	\$2,240,790
Ralph Wenz Field	20	20	\$801,700	\$850,280	\$3,321,450	\$3,508,290
Shively Field	33	35	\$902,880	\$1,013,310	\$4,060,380	\$4,566,830
South Big Horn County Airport	49	57	\$1,359,240	\$1,908,080	\$12,089,910	\$16,460,370
STATE TOTAL		220		\$6,848,820		\$42,351,140
Intermediate Airports						
Buffalo-Johnson County Airport	11	12	\$331,850	\$399,010	\$1,362,720	\$1,827,580
Camp Guernsey Army Airfield	19	21	\$972,320	\$1,083,340	\$6,459,080	\$6,958,770
Hunt Field	13	14	\$398,060	\$414,090	\$1,544,630	\$1,672,820
Kemmerer Municipal Airport	6	7	\$314,520	\$332,820	\$1,289,490	\$1,475,280
Miley Memorial Field	8	9	\$500,310	\$527,310	\$1,870,350	\$2,030,870
Mondell Field	9	10	\$339,310	\$385,350	\$1,232,200	\$1,401,140
Phifer Field	1	1	\$44,950	\$50,000	\$155,330	\$197,210
Powell Municipal Airport	7	7	\$259,820	\$269,570	\$744,460	\$831,100
Rawlins Municipal Airport-Harvey Field	17	18	\$628,880	\$664,810	\$1,666,820	\$1,837,970
Torrington Municipal Airport	19	24	\$645,580	\$937,430	\$2,811,440	\$4,952,110
STATE TOTAL		121		\$5,063,720		\$23,184,860
Local Airports						
Cokeville Municipal Airport	1	1	\$46,650	\$49,470	\$150,950	\$176,280
Dixon Airport	2	2	\$65,300	\$70,870	\$203,450	\$229,810
Dubois Municipal Airport	6	6	\$252,010	\$265,250	\$733,110	\$887,090
Fort Bridger Airport	5	6	\$243,360	\$259,450	\$842,220	\$952,120
Hot Springs County-Thermopolis Municipal Airport	23	24	\$703,620	\$770,750	\$1,872,680	\$2,194,310
Hulett Municipal Airport	5	5	\$165,800	\$177,140	\$430,560	\$482,690
Lusk Municipal Airport	4	5	\$209,410	\$234,730	\$777,590	\$1,031,440
North Big Horn County Airport	3	3	\$104,970	\$117,340	\$318,970	\$389,550
Pine Bluffs Municipal Airport	17	17	\$581,620	\$590,260	\$1,547,700	\$1,600,360
STATE TOTAL		69		\$2,535,270		\$7,943,650
COMBINED TOTAL		12,268		\$526,405,100		\$1,389,380,920

Note: All numbers in the table have been rounded. As a result, individual cells may not sum to the total shown.



2013 WYOMING AIRPORTS Economic Impact Study



Aeronautics Division

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