



2020 WYDOT AERONAUTICS DIVISION

# AVIATION ECONOMIC IMPACT STUDY

EXECUTIVE SUMMARY





## WYOMING AVIATION CONNECTING WYOMING - BUILDING OUR FUTURE

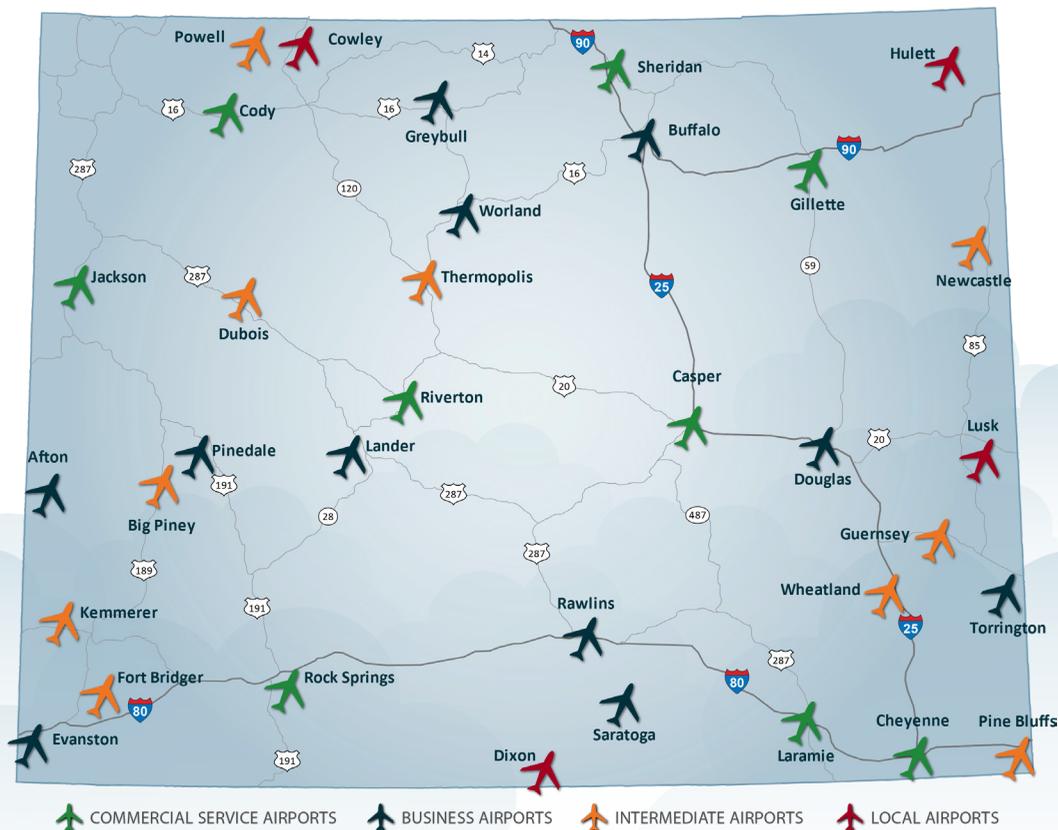
Airports in Wyoming are not only essential transportation links, they also contribute to many sectors of the state's economy, support a wide variety of essential services, and add to the quality of life for Wyoming residents, businesses, and visitors.

In 2020, the Wyoming Department of Transportation (WYDOT) Aeronautics Division completed an Aviation Economic Impact Study to determine the annual impact of the state's 34 public airports with paved runways. It is important to note that all economic impacts documented in this report reflect pre-COVID conditions for all study airports. This report provides a high level summary of WYDOT's economic impact research; additional reports and more detailed information are available at <http://www.dot.state.wy.us/home/aeronautics.html>.

Each airport, its aviation business tenants, visitors, WYDOT, and the Federal Aviation Administration (FAA) served as the primary data sources for determining both statewide and airport specific economic impacts reported in this summary. In addition to documenting economic impacts, considerable research and investigation was completed to document how airports support various users and uses. These uses and users contribute to many businesses, economic development, other economic sectors such as agriculture and forestry, healthcare and emergency services, aerial firefighting, tourism and recreation, and a wide variety of other activities noted in this report.

Within the state airport system, airports are assigned to a role; roles typically reflect the types of aviation activity each airport accommodates, along with the economic characteristics of the communities each airport serves. As shown here, Wyoming airports are assigned to one of the following roles: Commercial Service, Business, Intermediate, or Local.

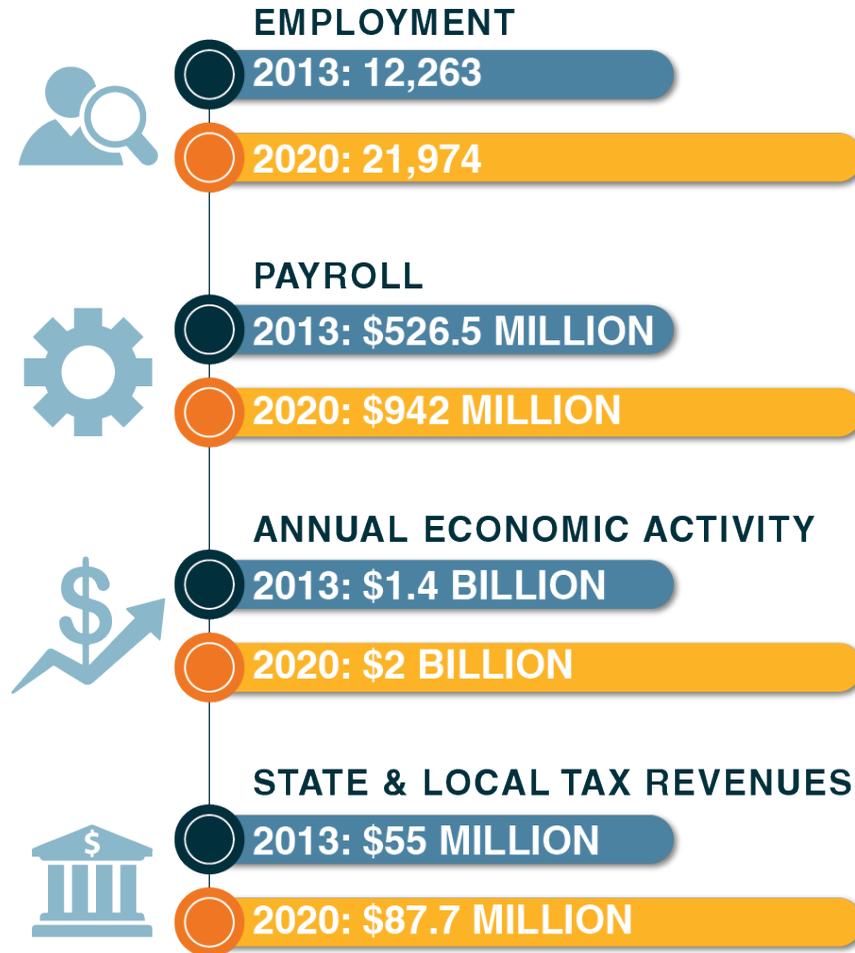
### State Roles for Wyoming Paved Public Airports



The Wyoming airport system has 40 airports; this study measured economic impacts for 9 commercial service and 25 public general aviation airports, all with paved runways.

## SUMMARY OF FINDINGS

The 2020 Economic Impact Study was similar to the previous study, published in 2013, and one of our objectives was to determine if economic impacts previously identified in the 2013 model had changed. That comparison shows that economic impacts have indeed changed and that they have increased. More detail on the sources for the statewide economic impacts reported here, along with the approach used to estimate all impacts, is provided later in this summary.



Economic impact studies are snapshots in time; they reflect conditions at the airports at the time data is collected to support the economic impact analysis. Data for this study was collected in late 2019 and early 2020 (pre-COVID), a time-frame in which many Wyoming airports had growing demand. On an airport-by-airport basis, between the two reporting periods, some airports experienced notable growth in their economic impacts, while a few airports experienced relative declines. Airports that experienced notable changes in their economic impacts generally either gained or lost one or more aviation-related business tenant, had higher or lower average annual capital investment for improvements, or had increases or decreases in their number of annual visitors. All airports had the opportunity to review the inputs that were used to establish their specific annual economic impacts, as reported in the study.

The next sections of this summary provide information on the study process and on specific economic impacts and airport benefits identified in the WYDOT study.

## ECONOMIC IMPACT CATEGORIES

As applicable for each study airport, data was collected and economic impacts measured in five separate categories. Not all airports have impacts for each category shown here; most notably, only the nine commercial service airports have impacts from commercial visitor expenditures. Data in the study's Technical Report provides airport specific economic impacts in each of the five impact categories shown here.



**AIRPORT MANAGEMENT**  
ACTIVITIES ASSOCIATED WITH THE DAILY OPERATION OF EACH AIRPORT



**AVIATION-RELATED BUSINESS TENANTS**  
AVIATION-RELATED BUSINESSES THAT GENERATE REVENUE AND HAVE PAID EMPLOYEES



**AVERAGE ANNUAL CAPITAL INVESTMENT**  
FIVE-YEAR AVERAGE ANNUAL STATE, FEDERAL, AIRPORT, AND PRIVATE INVESTMENT FOR CAPITAL IMPROVEMENTS



**GENERAL AVIATION VISITOR EXPENDITURES**  
EXPENDITURES BY VISITORS TO WYOMING WHO ARRIVE ON GENERAL AVIATION AIRCRAFT



**COMMERCIAL VISITOR EXPENDITURES**  
EXPENDITURES BY VISITORS TO WYOMING WHO ARRIVE ON A SCHEDULED COMMERCIAL AIRLINE FLIGHT



**STATE AND LOCAL TAX REVENUES**  
AIRPORT-SUPPORTED STATE AND LOCAL SALES TAX REVENUES

## ECONOMIC IMPACT MEASUREMENTS

Different measurements are used to report on economic impacts, both statewide and airport specific, presented in this summary. One of the primary objectives of an economic impact study is to measure how the entity being studied, in this case Wyoming's 34 paved public airports, supports activities that flow from the entity into the state or local economies. In this study, the sum of payroll and spending represents **total annual economic activity** in each of the five impact categories.



### EMPLOYMENT

All jobs that are in some way airport-supported



### ANNUAL PAYROLL

Annual income earned by all employees that are airport-supported



### ANNUAL SPENDING

Annual funds expended to operate the airport, run a business, or improve airports. Spending also includes money associated with visitor expenditures that are non-payroll related



### ANNUAL ECONOMIC ACTIVITY

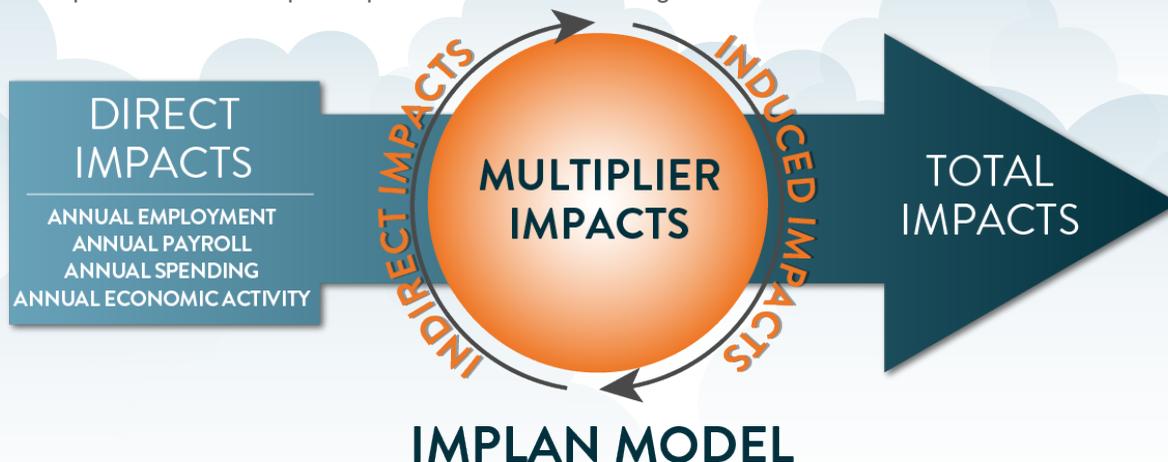
Combined payroll and spending represents the total flow of all economic impacts from the airports into the state's economy

## STUDY METHODOLOGY

The study used an approach consistent with Federal Aviation Administration (FAA) guidelines to estimate annual economic impacts. To support the analysis, data was collected through extensive interviews and surveys to identify **direct** economic impacts. Direct impacts are the first stage of the economic cycle measured in this study. An econometric input/output model (**IMPLAN**) is used to estimate **indirect** and **induced** impacts. Indirect and induced impacts are additional economic impacts in Wyoming's economy, sometimes known as multiplier impacts.

Indirect and induced impacts are experienced in the state's economy as a result of the initial direct impacts. When summed, direct, indirect, and induced impacts equal **total economic impacts**. Indirect impacts result from industries purchasing from other industries, whereas induced impacts result from the expenditure of new income associated with direct and indirect impacts. The study's Technical Report provides information that shows the portion of each airport's impacts that are related to direct impacts and the portion that is related to indirect/induced impacts, estimated using the IMPLAN model.

For this project, both a state model and 23 individual local/county models were developed using IMPLAN. All results presented in this summary are based on analysis conducted using the state model; impacts presented in this document show the total statewide impact of the 34 study airports. Additional modeling was completed to show similar impacts on just each airport's local economy. These impacts are estimated using models built on IMPLAN data for the county where the airport is located. Results which isolate just the airport's impact on its local economy are available in Appendix A of the study's Technical Report and in each airport's Individual Airport Report. Individual airport reports are available through WYDOT Aeronautics.



THE FOLLOWING SECTIONS OF THIS REPORT SUMMARIZE TOTAL IMPACTS BY CATEGORY FOR THE 34 STUDY AIRPORTS.

### AIRPORT MANAGEMENT IMPACT CATEGORY

Study airports have employees dedicated to overseeing day-to-day airport operations. Some employees in this category work at the airport, while others may work off-airport in other city and county office locations. Airport management employees can be full-time, part-time, or seasonal. For this analysis, all less than full-time jobs in all impact categories were converted to reflect full-time equivalent jobs/employment, sometimes referred to in economic impact studies as FTEs. Information on hours worked or salaries paid to less than full-time workers is used to convert these jobs to their appropriate FTE.

Airports have annual spending to support their operations. Airport spending includes, but is not limited to, items such as utilities, insurance, supplies, and routine maintenance. For this category, spending does not include payroll or capital investment. Statewide annual economic impacts in the airport management category for all study airports are shown below.



**For the information shown below, 94 percent of the total annual economic activity is related to the airport management function at the commercial service airports and the remaining 6 percent to management of the state’s public general aviation airports.**

**Statewide Annual Economic Impact for Study Airports from Airport Management**

IMPACT MEASURE	DIRECT	INDIRECT/INDUCED	TOTAL
Employment	213	222	435
Payroll	\$11,970,000	\$8,019,600	\$19,989,600
Spending	\$48,254,900	\$42,464,100	\$90,719,000
Annual Economic Activity	\$60,224,900	\$50,483,700	\$110,708,600





There are **146** different aviation-related business tenants at Wyoming airports. These businesses employ **2,041** individuals. Employees in the business tenant category have an average annual payroll that approaches **\$50,000**.

## BUSINESS TENANT IMPACT CATEGORY

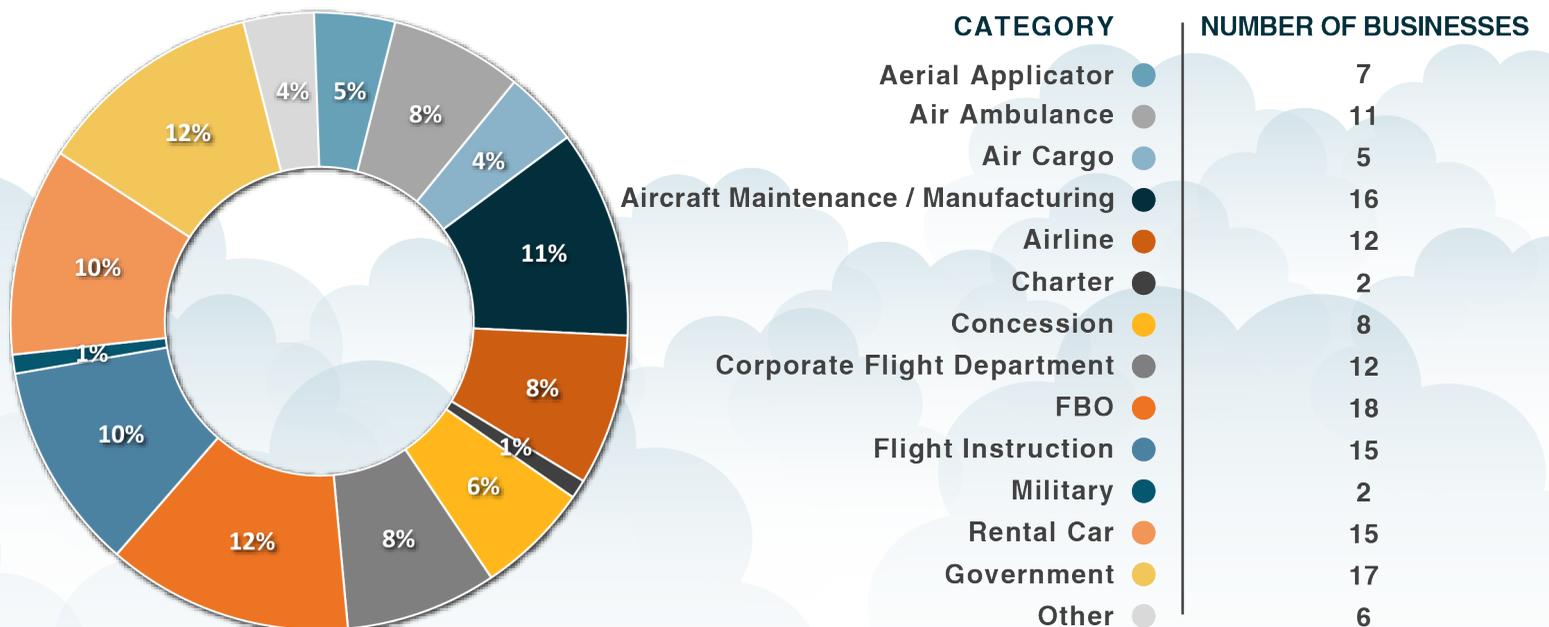
Study airports have business tenants that provide aviation-related services to aircraft and airport customers. Fixed base operators (FBOs), aircraft maintenance providers, corporate flight departments, flight instructors, aerial applicators, airlines, military units, TSA, and terminal concessionaires are examples of business tenants that provide services at Wyoming airports. For a business tenant to be considered in this analysis, they need to be a company that provides aviation-related services with paid employees.

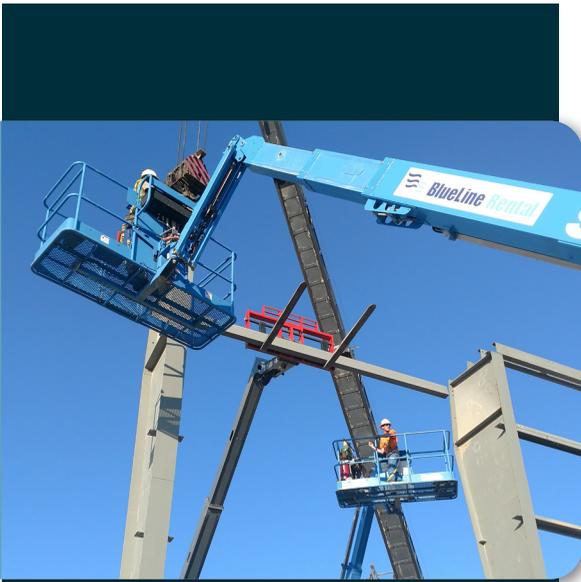
Business tenants at Wyoming airports support notable employment and the payroll that is associated with this employment. Business tenants also have spending to support their day-to-day operations; business tenant spending does not include payroll or capital investment. Annual statewide economic impacts from business tenants at the study airports are shown below.

Statewide Annual Economic Impact for Study Airports from Airport Business Tenants

IMPACT MEASURE	DIRECT	INDIRECT/INDUCED	TOTAL
Employment	2,041	1,587	3,628
Payroll	\$101,450,900	\$69,585,900	\$171,036,800
Spending	\$207,930,000	\$108,571,500	\$316,501,500
Annual Economic Activity	\$309,380,900	\$178,157,400	\$487,538,300

Distribution of Business Tenants By Service Type





## AVERAGE ANNUAL CAPITAL INVESTMENT IMPACTS

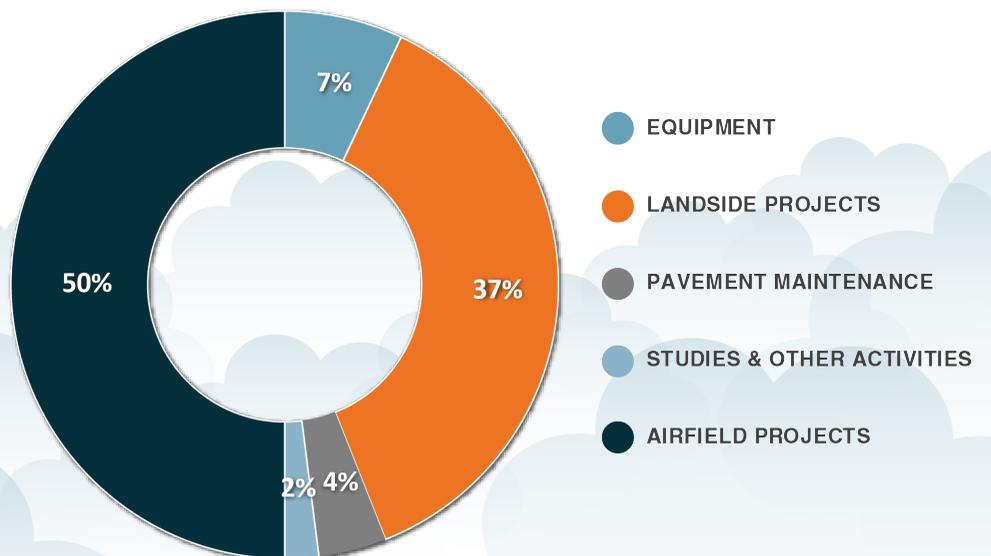
Frequently, Wyoming airports undertake capital improvement projects to rehabilitate, renovate, or expand their facilities. Capital projects are undertaken using local, state, federal, airport, and private funds. The nature of capital improvement projects is often cyclical; therefore, each airport's capital investment history over a five-year period (2015-2019) is considered to estimate economic impacts in this category.

Impacts in this category take place when projects are being planned, permitted, designed, engineered, and implemented. Direct average annual capital investment for each study airport is entered into the IMPLAN model to estimate direct employment and payroll supported by the airport's direct average annual capital investment. IMPLAN is also used to identify indirect and induced impacts for this impact category. Annual statewide economic impacts for the capital investment category for all airports are shown below.

### Statewide Annual Economic Impact for Study Airports from Average Annual Capital Investment

IMPACT MEASURE	DIRECT	INDIRECT/ INDUCED	TOTAL
Employment	293	190	483
Payroll	\$12,999,300	\$9,359,400	\$22,358,700
Spending	\$46,951,900	\$26,762,300	\$73,714,200
Annual Economic Activity	\$59,951,200	\$36,121,700	\$96,072,900

### Distribution of Capital Investment by Project Type



## GENERAL AVIATION VISITOR EXPENDITURE IMPACTS

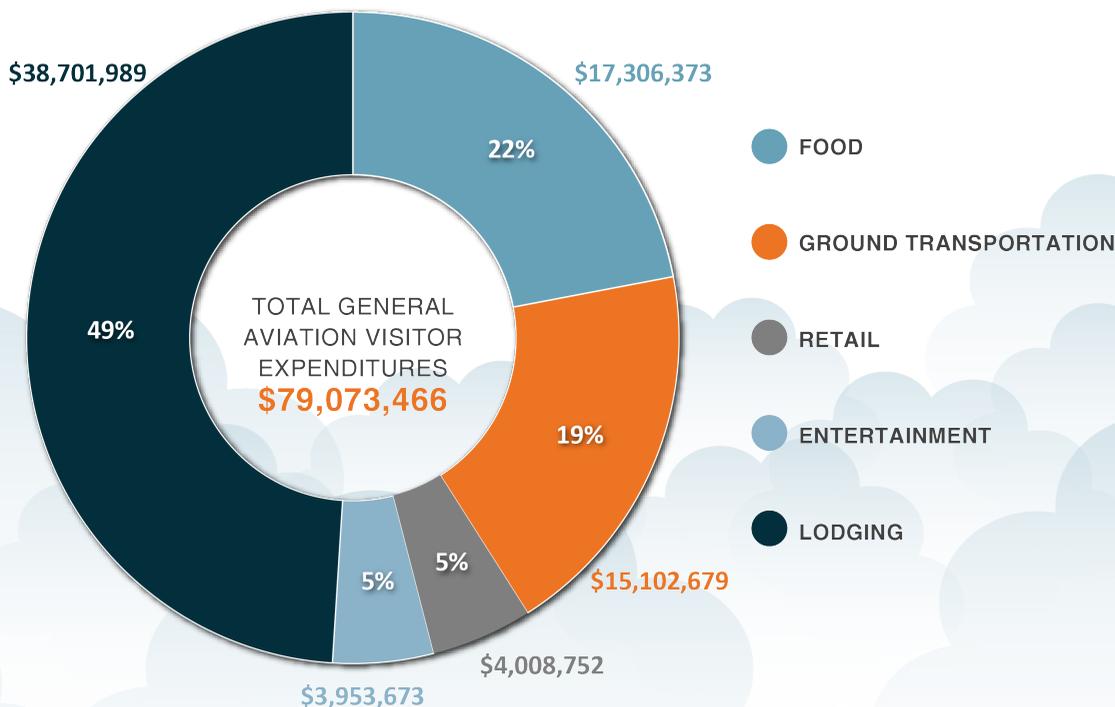
Study research shows that approximately **45,560** visiting general aviation aircraft arrivals bring an estimated **200,350** annual general aviation visitors to all study airports. General aviation is often selected for its efficiency, especially for business travel. Trips can be made in a day without an overnight stay. For this study, airports, FBOs, and a study intern helped to collect surveys from general aviation visitors. Study surveys indicate a wide range in average general aviation visitor expenditures per trip per visitor. Reported general aviation visitor spending ranges from **\$76 to \$896** per visitor per trip. After direct visitor expenditures by airport are developed, the IMPLAN model is used to determine the direct employment and payroll supported by each airport's general aviation visitor expenditures. The table below shows total statewide annual economic impacts associated with general aviation visitor expenditures for all study airports.



**Statewide Annual Economic Impact for Study Airports from General Aviation Visitor Expenditures**

IMPACT MEASURE	DIRECT	INDIRECT/INDUCED	TOTAL
Employment	1,312	357	1,669
Payroll	\$41,644,600	\$16,241,500	\$57,886,100
Spending	\$37,428,800	\$19,837,500	\$57,266,300
Annual Economic Activity	\$79,073,400	\$36,079,000	\$115,152,400

Over 1,200 general aviation visitor surveys were completed to support impacts identified in this category. Surveys were collected from June 2019 through early March 2020. The visitor surveys provided information on the distribution of visitor expenditures between categories such as lodging, food, ground transportation, retail, and entertainment. Statewide, on average, 41 percent of all general aviation visitor trips are “day-only”, which limits spending opportunities.



## COMMERCIAL VISITOR EXPENDITURE IMPACTS

A portion of each airport's annual enplanements (boarding passengers) are residents of each airport's market area, and the remainder are visitors. The distribution between resident and visitor enplanements varies by airport. As a percent of total enplanements, visitors range from a high of **90 percent to a low of 40 percent**. Information from the United States Department of Transportation (USDOT) is used to establish resident versus visitor enplanements for each commercial airport. WYDOT provided total 2019 passenger enplanements for each airport. Using USDOT and WYDOT information, the table below shows each airport's visiting enplanements and average expenditures per visitor per trip by airport. Annual statewide impacts from commercial visitor expenditures at the nine commercial service study airports are also reported below.



**Over 26,850 surveys helped to provide estimates of average spending per visitor per trip at the commercial airports. Over 518,000 visitors come to Wyoming each year on commercial flights serving the nine commercial service study airports.**

### Visitors Arriving on Commercial Airlines at Study Airports and Average Expenditures Per Trip

FAA ID	AIRPORT NAME	TOTAL ANNUAL COMMERCIAL VISITORS	PERCENTAGE OF TOTAL ENPLANEMENTS THAT ARE VISITORS	AVERAGE EXPENDITURE PER VISITOR TRIP	TOTAL COMMERCIAL VISITOR EXPENDITURES
CPR	Casper - Natrona County International Airport	42,162	43%	\$710	\$29,934,800
CYS	Cheyenne Regional Airport - Jerry Olson Field	8,729	55%	\$550	\$4,801,000
COD	Cody - Yellowstone Regional Airport	27,934	68%	\$720	\$20,112,400
GCC	Gillette - Northeast Wyoming Regional Airport	12,218	40%	\$660	\$8,063,800
JAC	Jackson Hole Airport	397,468	90%	\$1,920	\$763,138,400
LAR	Laramie Regional Airport	9,931	55%	\$690	\$6,852,400
RIW	Riverton - Central Wyoming Regional Airport	4,259	57%	\$610	\$2,598,100
RKS	Rock Springs - Southwest Wyoming Regional Airport	9,810	41%	\$620	\$6,082,000
SHR	Sheridan County Airport	5,648	58%	\$580	\$3,276,100
<b>COMMERCIAL SERVICE AIRPORTS TOTAL</b>		<b>518,159</b>	<b>70%</b>	<b>\$1,631</b>	<b>\$844,859,000</b>

### Statewide Annual Economic Impact for Study Airports from Commercial Visitor Expenditures

IMPACT MEASURE	DIRECT	INDIRECT/INDUCED	TOTAL
Employment	12,124	3,635	15,759
Payroll	\$482,354,900	\$188,118,500	\$670,473,400
Spending	\$362,504,100	\$181,252,100	\$543,756,200
Annual Economic Activity	\$844,859,000	\$369,370,600	\$1,214,229,600

## TOTAL ANNUAL STATEWIDE ECONOMIC IMPACTS FOR ALL STUDY AIRPORTS

The table below shows statewide impacts for all study airports for each of the five impact categories. The totals include direct impacts, identified through study research, and indirect/induced impacts estimated using the state IMPLAN model. Economic activity in all impact categories is the sum of payroll and spending.

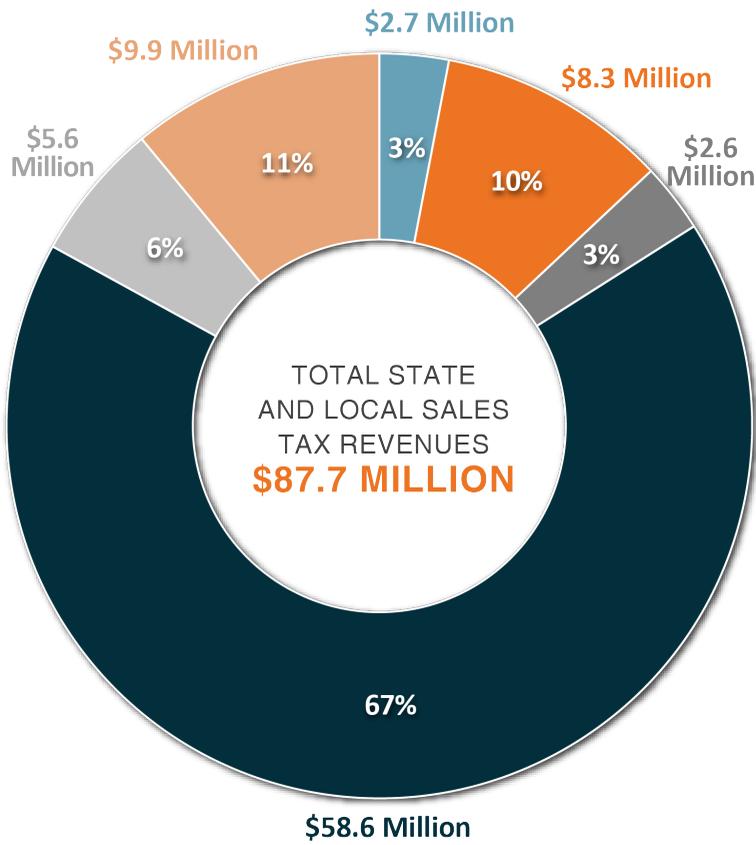
Statewide Economic Impact from All Impact Categories for All Study Airports

CATEGORY	CATEGORY	DIRECT	INDIRECT/INDUCED	TOTAL
EMPLOYMENT	Airport Management	213	222	435
	Airport Business Tenants	2,041	1,587	3,628
	Capital Investment	293	190	483
	General Aviation Visitors	1,312	357	1,669
	Commercial Visitors	12,124	3,635	15,759
	<b>Total Employment</b>	<b>15,983</b>	<b>5,991</b>	<b>21,974</b>
PAYROLL	Airport Management	\$11,970,000	\$8,019,600	\$19,989,600
	Airport Business Tenants	\$101,450,900	\$69,585,900	\$171,036,800
	Capital Investment	\$12,999,300	\$9,359,400	\$22,358,700
	General Aviation Visitors	\$41,644,600	\$16,241,500	\$57,886,100
	Commercial Visitors	\$482,354,900	\$188,118,500	\$670,473,400
	<b>Total Payroll</b>	<b>\$650,419,700</b>	<b>\$291,324,900</b>	<b>\$941,744,600</b>
SPENDING	Airport Management	\$48,254,900	\$42,464,100	\$90,719,000
	Airport Business Tenants	\$207,930,000	\$108,571,500	\$316,501,500
	Capital Investment	\$46,951,900	\$26,762,300	\$73,714,200
	General Aviation Visitors	\$37,428,800	\$19,837,500	\$57,266,300
	Commercial Visitors	\$362,504,100	\$181,252,100	\$543,756,200
	<b>Total Spending</b>	<b>\$703,069,700</b>	<b>\$378,887,500</b>	<b>\$1,081,957,200</b>
ANNUAL ECONOMIC ACTIVITY	Airport Management	\$60,224,900	\$50,483,700	\$110,708,600
	Airport Business Tenants	\$309,380,900	\$178,157,400	\$487,538,300
	Capital Investment	\$59,951,200	\$36,121,700	\$96,072,900
	General Aviation Visitors	\$79,073,400	\$36,079,000	\$115,152,400
	Commercial Visitors	\$844,859,000	\$369,370,600	\$1,214,229,600
<b>Total Annual Economic Activity</b>	<b>\$1,353,489,400</b>	<b>\$670,212,400</b>	<b>\$2,023,701,800</b>	

As shown in the graphic below, using the state model, this study estimates the following annual statewide annual economic impacts for all 34 commercial and general aviation study airports.

### Total Statewide Annual Economic Impacts





- AIRPORT OPERATIONS
- COMMERCIAL VISITORS
- BUSINESS TENANTS
- GENERAL AVIATION VISITORS
- CAPITAL INVESTMENT PLAN
- ALL AIRPORT-SUPPORTED EMPLOYEES

## STATE AND LOCAL TAX REVENUE IMPACTS

Airport activities in Wyoming contribute to state and local sales tax revenues. Statewide tax impacts presented here are based only on annual direct economic impacts identified in the WYDOT study. Additional indirect/induced impacts are not considered in the tax revenue analysis.

Aviation-related local and state sales tax come from a variety of airport-supported activities that create taxable events. For this study, the following were considered:

- Sales tax collected on airport taxable purchases of goods, supplies, and materials to support airport operations
- Sales tax collected on the purchase of goods, supplies, and materials by airport business tenants
- Sales tax collected on the taxable portion of average annual capital improvement investment (CIP)
- Sales tax paid by general aviation visitors when they have expenditures for lodging, food, ground transportation, entertainment, or retail purchases
- Sales tax paid by commercial visitors when they have expenditures for lodging, food, ground transportation, entertainment, or retail purchases
- Sales tax paid by those whose jobs are supported by airport activities; these are direct jobs identified for management, business tenants, capital investments, and all visitor related spending

Total annual sales tax revenue collected by state and local governments that is airport-supported is estimated at **\$87.7 million**. The accompanying graph shows state and local sales tax revenues by category. The table at the end of this summary shows estimated state and local sales tax revenues associated with each airport.



## CASE STUDIES

As part of the WYDOT study, research was undertaken to determine how study airports support different users and activities that are essential to Wyoming's way of life. The results are discussed here.

### AERIAL FIREFIGHTING

From 2015 to 2019, Wyoming experienced 1,401 wildland fires; 2016 and 2018 were the biggest wildfire years, accounting for 75 percent of all acres burned. The U.S. Department of Agriculture (USDA) assigns fire severity and response to three basic categories: low, moderate, and high severity. More than 80 percent of all fires are classified as low severity; only moderate and high severity fires typically require aerial firefighting.

The Casper Sheep Herder Hill fire in 2012, the Roosevelt Fire in September 2018 near Hoback Ranches in the Bridger-Teton National Forest, and the 2020 Mullen Fire in the Medicine Bow National Forest are examples of Wyoming fires that required aerial firefighting responders. Firefighters use aircraft both for early fire detection (reconnaissance) and early suppression to keep the conflagration in a holding pattern, buying time for ground-based firefighters.

Some aircraft used in aerial firefighting are contracted by the State of Wyoming, and others are owned by the military or the U.S. Forest Service. Aircraft are also leased during times of high fire activity. The Wyoming fire season is mid-June to mid-September. Firefighting aircraft include single engine airtankers (SEAT), large airtankers such as DC-10 aircraft, and various types of water scoopers and helicopters.

The Bureau of Land Management (BLM) maintains SEAT bases at airports in Casper, Riverton, Rawlins, and Greybull; and BLM recently completed a new base in Rock Springs. Casper - Natrona County Airport and Northwest Wyoming Regional Airport in Gillette are also used as temporary bases for DC-10 firefighting aircraft. The Wyoming Air National Guard, 153<sup>rd</sup> Airlift Wing, based at Cheyenne Regional Airport, also supports aerial firefighting. In isolated circumstances, other study airports have played supporting roles in aerial firefighting activities and some airports support aerial firefighter training.

### AERIAL APPLICATORS

Agriculture is one of the top three industries in Wyoming, accounting for \$2 billion in annual cash receipts. Most of Wyoming's agricultural production is in livestock and animal products (75 percent); hay is the state's largest crop, followed by corn and sugar beets. Aerial applicators use study airports to provide services to both ranchers and farmers. Wyoming has 29 million acres in ranches and farms, and the state ranks #1 for the largest farms and ranches in the U.S. The average farm size in Wyoming is over 2,400 acres. Aerial applicators perform many vital tasks; these include seeding crops; fertilizing crops, rangeland, and forests; protecting crops/forests against disease and pests; and mitigating weed growth.

In 2019, 52 individuals or companies applied for aerial applicator licenses with the Wyoming Department of Agriculture; 40 percent of these aerial applicators were Wyoming-based and the remainder were based in other nearby states. Study research shows that over 60 percent of all study airports regularly support aerial applicators. Seven of the study airports host a based aerial applicator, other applicators are based at non-study airports or on farms and ranches.

Aerial spraying, supported by study airports, is also important to Wyoming's national forests. As of 2019, cheatgrass had spread in forested areas, crowding out other plants and allowing wildfires to spread more easily. Bridger Teton National Forest managers and the Wyoming Game and Fish Department manage cheatgrass using aerial spraying supported by study airports.





## HEALTHCARE AND EMERGENCY MEDICAL SERVICES (EMS)

In Wyoming, airports are essential components of the healthcare system. Aviation is used to transport patients with time-sensitive conditions such as heart attacks, strokes, trauma/injury, and/or complications during childbirth. Air medical services are also used for emergency airlift of accident victims, for doctor transport to rural hospitals and clinics, and for tissue and organ transfers. Some laboratory tests and needed medical supplies and equipment are also carried in aircraft.

Patient transfers to larger, more resourced facilities and rescues of accident victims in remote locations are often supported by study airports. Focusing on airlift from accidents and patient transfers, EMS providers reported 21 percent of their medical airlifts involved transporting patients from accidents to hospitals, and 79 percent involved patient transfers to different facilities, 62 percent being out-of-state.

Private aircraft are also used for medical support. Angel Flight West (AFW), a nonprofit volunteer organization operating within the 13 Western states including Wyoming, matches up volunteer pilots and their aircraft to patients in need; this enables children and adults to receive medical treatment or other vital care that is not available locally.

Aviation makes it possible to move patients, medical specialists, medical devices, organs, and blood products throughout the state. Premier Bone & Joint Centers, based in Laramie, runs nine orthopedic clinics across Wyoming, serving about 80 percent of the state's population. Using their four King Air C90As, doctors visit with patients around the state. Several medical practices use this operating model, making it possible to serve many rural communities in Wyoming. Hospitals, medical providers, and EMS operators report regular use of over 70 percent of all study airports to support their activities, however, all study airports indicate that from time-to-time they support emergency airlift flights.



## AGENCY SUPPORT

Over 100 different state, regional, and local agencies were surveyed to determine if and how the agencies rely on the study airports to support their activities, missions, and responsibilities; the agency survey had a 38 percent response rate. Responding agencies indicated they most frequently rely on the study airports to support the following activities.

**Healthcare/Medical and Emergency Services** – Many responding agencies are responsible for recruiting and retaining high quality jobs in Wyoming. Agencies report healthcare is essential to job retention and attraction, and study airports play an essential role in supporting statewide healthcare and emergency medical services.

**Air Service** – All agencies, engaged in economic development efforts, confirmed that access to scheduled commercial airline service is very important to Wyoming's ability to effectively attract economic development opportunities. Many businesses rely on commercial airline travel for their employees. Recognizing the importance of commercial airline service, Wyoming has a comprehensive state program to develop and retain commercial air service.

**Lifestyle** – Many companies locate in Wyoming because of the lifestyle that the state affords them and their employees. However, just because a business chooses to locate in a less developed or more rural area, that does not mean that they do not have a need for the accessibility and connectivity that can only be provided by air travel. Corporate, chartered, or rented general aviation aircraft, supported by study airports, open-up communities to a variety of economic development opportunities.

**Time Savings** – Instate travel in Wyoming is often time consuming. Agencies, especially state agencies, have responsibilities that extend to communities throughout the state. Highway travel from one city to another can take an entire day or more in each direction. Almost every agency responding to the survey identified the study airports as being essential to efficient instate travel, cutting trips from days to hours.

## CONNECTIVITY PROVIDED BY WYOMING AIRPORTS

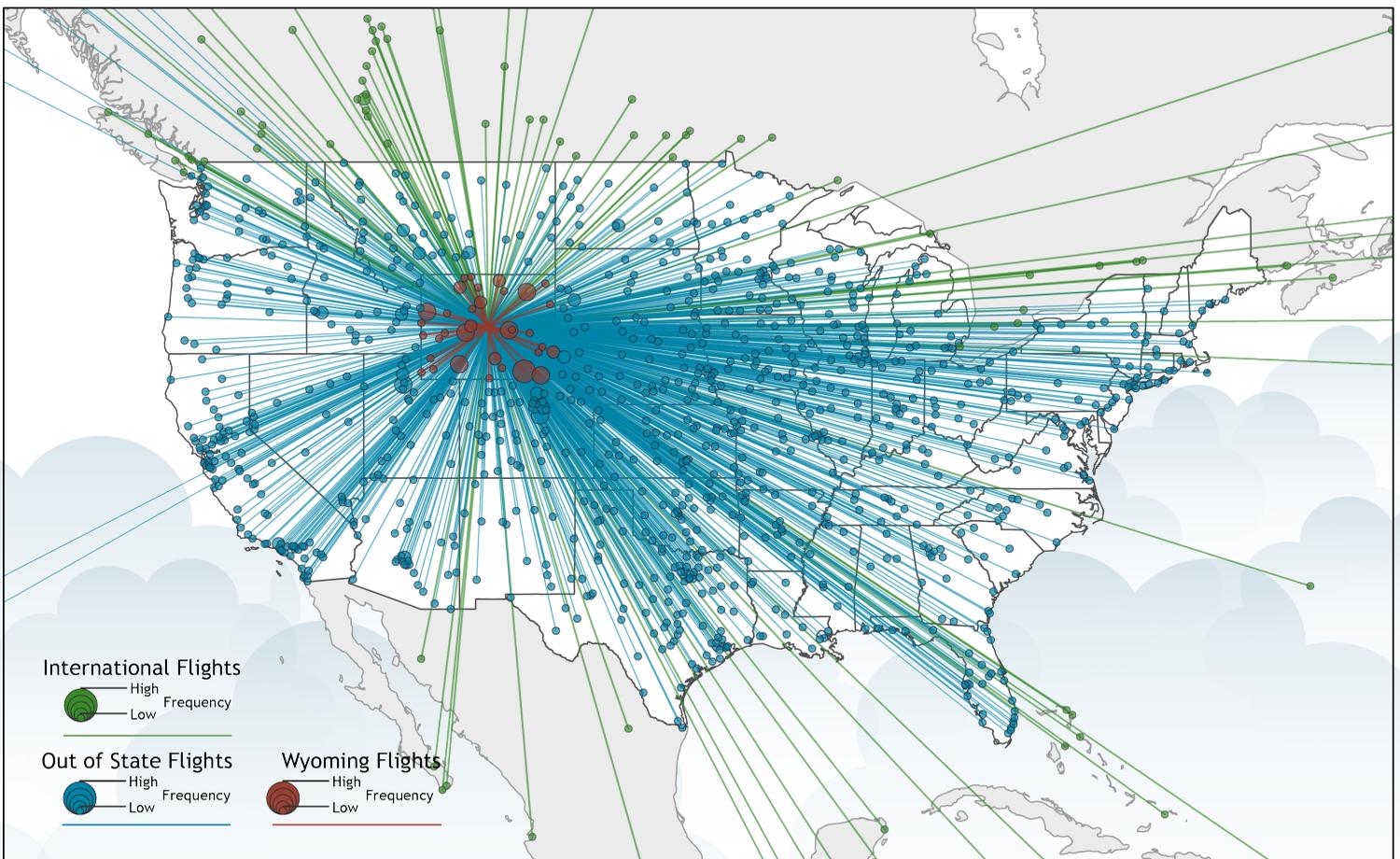
Each day Wyoming airports play an important role, providing non-stop connections for businesses, residents, and visitors to destinations in the state, the region, the United States, and even international locations. Data from the FAA's National Offload Program (NOP) identifies these locations. The map below shows the results of the analysis of the FAA data reflecting activity from August 2018 to August 2019.

Many of the flights shown here are flown by general aviation aircraft operated by Wyoming businesses. FAA data shows that an estimated **27 percent** of all general aviation flights are from one Wyoming airport to another. This shows the important role that airports play, providing a time saving alternative to driving within the state.

FAA data also shows that many general aviation flights are to regional business centers such as Salt Lake, Billings, and Boise. By volume, flights to and from Wyoming are most often to Colorado, Utah, California, Montana, and Texas. Flights to Texas are often tied to Wyoming's energy industry. Wyoming airports also support non-stop general aviation flights to international destinations most often in Canada, followed by destinations in Mexico. Connectivity provided by Wyoming airports is essential for providing access to rural areas of the state.

### Non-Stop General Aviation Flights

On a daily basis, commercial and general aviation flights arriving at and departing from Wyoming airports connect businesses, residents, and visitors to thousands of domestic and international destinations. These flights are commerce, tourism, healthcare, and other vital services in action. Wyoming airports are key contributors to the state's economy and are essential to the state's quality of life.



Flight map shows FAA data reflecting activity from August 2018 to August 2019.

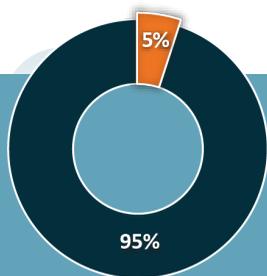
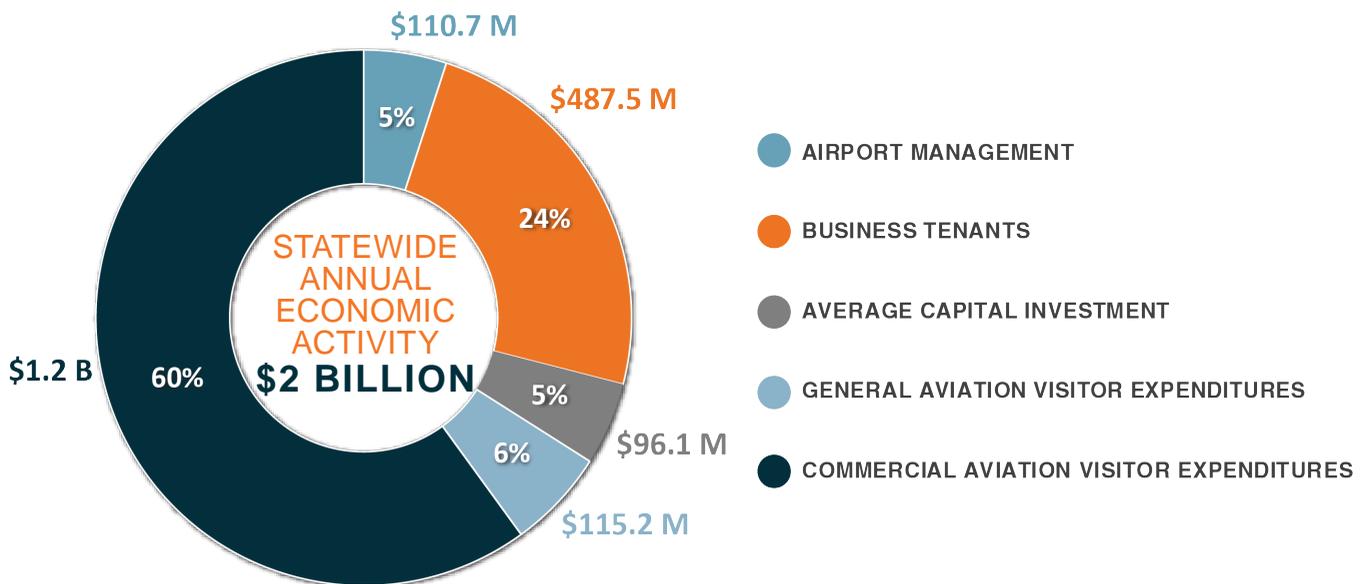


Combined, all study airports are responsible for supporting just over \$2 billion in annual economic activity in Wyoming's economy. This activity supports almost 22,000 jobs that have an annual payroll of \$942 million. As shown in the graph below, expenditures by visitors arriving on commercial airline flights account for the majority of the statewide annual economic activity identified in the WYDOT study.

## SUMMARY OF FINDINGS

As the study shows, the state's public airports are responsible for significant annual economic impact. These impacts are summarized in this section.

### Distribution of Total Annual Economic Activity

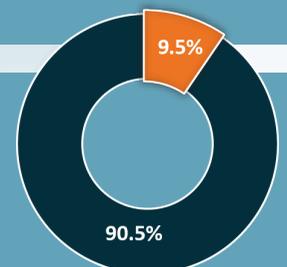


### AIRPORT-RELATED ANNUAL ECONOMIC ACTIVITY & GROSS STATE PRODUCT

This study shows that when all direct and indirect/induced impacts are considered the public airports are responsible for just over \$2 billion in annual economic activity. This annual economic activity is about 5 percent of Wyoming's Gross State Product.

### AIRPORT-SUPPORTED EMPLOYMENT AND TOTAL STATE EMPLOYMENT

When direct and indirect/induced impacts from all impact categories are accounted for, the public airports support almost 22,000 jobs. There are an estimated 5,600 jobs in the state that are dependent on the public airports, making total estimated additional jobs in Wyoming 27,600. These jobs represent about 9.5 percent of the state's total employment.



## TOTAL ANNUAL ECONOMIC IMPACTS BY AIRPORT

The following table shows total annual economic impacts and annual sales tax revenues for each of the study airports. These impacts were developed using the state IMPLAN model and include direct plus all indirect/induced impacts. More information on all impacts are available in the study's Technical Report.

FAA ID	AIRPORT NAME	TOTAL EMPLOYMENT	TOTAL PAYROLL	TOTAL SPENDING	TOTAL ANNUAL ECONOMIC ACTIVITY	TOTAL STATE/ LOCAL TAX REVENUES
<b>COMMERCIAL SERVICE AIRPORTS</b>						
CPR	Casper - Natrona County International Airport	1,203	\$46,633,700	\$99,245,300	\$145,879,000	\$5,453,010
CYS	Cheyenne Regional Airport - Jerry Olson Field	2,296	\$80,526,800	\$124,529,200	\$205,056,000	\$2,251,320
COD	Cody - Yellowstone Regional Airport	686	\$21,868,500	\$43,846,100	\$65,714,600	\$2,413,690
GCC	Gillette - Northeast Wyoming Regional Airport	339	\$11,653,800	\$22,958,100	\$34,611,900	\$1,288,380
JAC	Jackson Hole Airport	15,607	\$707,109,200	\$625,733,100	\$1,332,842,300	\$68,027,380
LAR	Laramie Regional Airport	296	\$11,206,400	\$26,072,300	\$37,278,700	\$1,449,730
RIW	Riverton - Central Wyoming Regional Airport	175	\$7,440,200	\$13,895,000	\$21,335,200	\$661,010
RKS	Rock Springs - Southwest Wyoming Regional Airport	324	\$11,363,200	\$25,488,200	\$36,851,400	\$1,392,750
SHR	Sheridan County Airport	340	\$13,934,200	\$34,295,800	\$48,230,000	\$1,837,590
<b>Commercial Service Airports Total</b>		<b>21,266</b>	<b>\$911,736,000</b>	<b>\$1,016,063,100</b>	<b>\$1,927,799,100</b>	<b>\$84,774,860</b>
<b>BUSINESS AIRPORTS</b>						
AFO	Afton - Lincoln County Municipal Airport	94	\$4,934,900	\$11,582,200	\$16,517,100	\$456,030
BYG	Buffalo - Johnson County Airport	16	\$584,300	\$2,054,000	\$2,638,300	\$98,940
DGW	Douglas - Converse County Airport	20	\$717,500	\$2,264,600	\$2,982,100	\$88,330
EVW	Evanston-Uinta County Airport - Burns Field	30	\$943,100	\$2,470,400	\$3,413,500	\$121,880
GEY	Greybull - South Big Horn County Airport	32	\$1,731,300	\$2,280,400	\$4,011,700	\$87,830
LND	Lander - Hunt Field	46	\$2,785,600	\$5,416,300	\$8,201,900	\$208,710
PNA	Pinedale - Ralph Wenz Field	34	\$1,437,600	\$3,098,400	\$4,536,000	\$112,800
RWL	Rawlins Municipal Airport - Harvey Field	22	\$1,104,600	\$2,014,300	\$3,118,900	\$98,830

FAA ID	AIRPORT NAME	TOTAL EMPLOYMENT	TOTAL PAYROLL	TOTAL SPENDING	TOTAL ANNUAL ECONOMIC ACTIVITY	TOTAL STATE/ LOCAL TAX REVENUES
SAA	Saratoga - Shively Field	193	\$5,868,100	\$10,451,800	\$16,319,900	\$765,470
TOR	Torrington Municipal Airport	16	\$783,000	\$1,856,900	\$2,639,900	\$74,780
WRL	Worland Municipal Airport	46	\$2,389,900	\$5,821,200	\$8,211,100	\$241,570
<b>Business Airports Total</b>		<b>549</b>	<b>\$23,279,900</b>	<b>\$49,310,500</b>	<b>\$72,590,400</b>	<b>\$2,355,170</b>
<b>INTERMEDIATE AIRPORTS</b>						
BPI	Big Piney - Miley Memorial Field	8	\$261,200	\$530,200	\$791,400	\$16,700
DUB	Dubois Municipal Airport	8	\$283,700	\$906,400	\$1,190,100	\$32,240
FBR	Fort Bridger Airport	5	\$152,100	\$528,400	\$680,500	\$17,680
GUR	Guernsey - Camp Guernsey Army Airfield	26	\$1,441,900	\$2,039,200	\$3,481,100	\$18,900
EMM	Kemmerer Municipal Airport	8	\$276,900	\$715,500	\$992,400	\$29,120
ECS	Newcastle - Mondell Field	16	\$571,800	\$1,699,400	\$2,271,200	\$75,600
82V	Pine Bluffs Municipal Airport	12	\$751,000	\$1,725,800	\$2,476,800	\$76,550
POY	Powell Municipal Airport	20	\$810,200	\$1,526,400	\$2,336,600	\$49,520
HSG	Thermopolis - Hot Springs County Airport	18	\$726,400	\$1,805,300	\$2,531,700	\$78,950
EAN	Wheatland - Phifer Airfield	16	\$573,600	\$2,402,100	\$2,975,700	\$104,120
<b>Intermediate Airports Total</b>		<b>137</b>	<b>\$5,848,800</b>	<b>\$13,878,700</b>	<b>\$19,727,500</b>	<b>\$499,380</b>
<b>LOCAL AIRPORTS</b>						
U68	Cowley - North Big Horn County Airport	6	\$192,600	\$799,100	\$991,700	\$26,760
DWX	Dixon Airport	10	\$537,300	\$1,441,000	\$1,978,300	\$64,730
W43	Hulett Municipal Airport	3	\$61,800	\$145,100	\$206,900	\$7,130
LSK	Lusk Municipal Airport	3	\$88,200	\$319,700	\$407,900	\$13,820
<b>Local Airports Total</b>		<b>22</b>	<b>\$879,900</b>	<b>\$2,704,900</b>	<b>\$3,584,800</b>	<b>\$112,440</b>
<b>All Airports Total</b>		<b>21,974</b>	<b>\$941,744,600</b>	<b>\$1,081,957,200</b>	<b>\$2,023,701,800</b>	<b>\$87,741,850</b>





**FOR MORE INFORMATION:**

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