



WYOMING AERONAUTICS COMMISSION

Air Service Enhancement Program & Capacity Purchase Agreement

Annual Report

Per W.S. § 10-3-602(C), 10-7-104

Wyoming Department of Transportation
Aeronautics Division
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Executive Summary

Calendar year 2019 exceeded the previous record setting year of 2018 for commercial passenger traffic in the state and the first two months of 2020 were setting more records prior to COVID-19. Overall passenger traffic to the state increased more than 15% from 2018 to 2019, the highest of any US state. Once again the state's busiest airport, Jackson Hole, led the passenger volume increase by adding more than 116,000 additional passengers to the state. Every commercial airport in the state also grew in passenger traffic over the previous 2018 calendar year.

The Capacity Purchase Agreement (CPA) was underway at the recently renamed Northeast Wyoming Regional Airport (Gillette) and at the Southwest Wyoming Regional Airport in Rock Springs starting in October, and delivered modest increases in passenger traffic through the end of the year with additional flights in Gillette. The start of 2020 looked even more promising than 2019, as Jackson Hole was undergoing another record winter travel season. United Express operated by SkyWest under the CPA was scheduled to begin in the middle of January at Riverton-Central Wyoming Regional Airport and Sheridan County Airport.

Prior to COVID-19, the first few months of service under the CPA were living up to the intended benefits of the program – more passengers at a lower cost to the state and local communities. Riverton had its best combined January and February since 2008, and Sheridan its best ever, all while expending fewer dollars in revenue guarantees in those communities. In Sheridan and Riverton combined, per passenger costs were reduced by 60%, with 43% more passengers at a 9% reduction in total costs. Perhaps more importantly in the post COVID-19 environment, the CPA also provided a backstop to prevent Wyoming communities from completely losing air service.

While receiving federal CARES Act relief funds, airlines were obligated to not discontinue service to most cities until October 1, 2020. It's uncertain whether routes would or could be dropped in the future, including those in Wyoming. With the CPA in place, the state is better positioned to retain service in the future as the airline industry continues to change.

Industry Trends and COVID-19 Impacts

The unprecedented scale of the impact of COVID-19 on the travel environment is only just now beginning to be understood. Passenger traffic fell more than 95% in April, as more than half of the nation's airline fleet was idled. It will take years for passenger traffic to fully recover, and even then, it is unclear whether ticket margins will recover for airlines, as corporate and business traffic has been stymied. The largest US airline trade organization, Airlines for America, is expecting 2020 traffic to be down 60% compared to 2019, and 2021 to be down 40% when compared to 2019. A full recovery in passenger traffic is not likely until at least 2023.

Aircraft retirements have been accelerated across most legacy airlines as they sought to cut

costs, reduce aircraft sizes, and mitigate redundancies. Several regional airlines were forced to shut down operations as a result of shifting industry trends. Trans States Airlines which served Cody and Casper under United Express was forced to shutter operations earlier than expected, as United Airlines simplified some regional jet operations under one regional provider. American Airlines in August discontinued service to a number of small communities, leaving several of those communities with no air service should a financial backstop not be able to reinstate service.

Through the summer, Wyoming and its neighboring states have fared relatively better than national averages. Tourist traffic was the first and most predominant traffic to rebound as visitors pursued destinations to the rural, Rocky Mountain west. Overall year-to-date passenger traffic to the state through July 2020 is down 45% compared to 58% nationally. In July, Wyoming had the smallest decline in passenger traffic of any state. August and September are also expected to be less than the national declines.

The COVID-19 outbreak also meant the discontinuation of American Airlines flights from Cheyenne to Dallas/Ft. Worth (DFW) operated by SkyWest. Aircraft availability in American Airlines prorate network might have made this route untenable medium-term, but discontinuation was accelerated by the COVID-19 effects on travel and SkyWest, and the Cheyenne Regional Air Focus Team elected to save minimum revenue guarantee funds. Service will be reinstated to Cheyenne on United Express operated by SkyWest starting November 11, 2020. This will help the airport retain TSA screening services, and remain eligible for federal funds for capital projects.

For more information on the COVID-19 impacts to the airline industry, please refer to the appendix for an analysis by Mead and Hunt.

[Air Service Enhancement Program](#)

Enclosed in this report is a summary of Air Service Enhancement Program (ASEP) expenditures for fiscal year 2019 and 2020, as well as an accompanying synopsis of each project. Three communities required extensions on their FY 2019 agreements in order to bridge them into the Capacity Purchase Agreement; those three being Sheridan and Riverton, which both required additional funds for their six and a half month extension, and Rock Springs, which required no additional funds to extend for an additional three months. Another project being reported on from FY 2019 is seasonal service from Cody-Yellowstone Regional Airport to Chicago O'Hare, which was ongoing during last year's programmatic update. That project required fewer funds than allocated, resulting in \$93,150 in state funds being recovered.

FY 2019 ASEP Project Updates

	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	\$ 1,531,937	\$ 715,514	\$ 1,531,937
State Grant Expended	\$ (41,250)	\$ (1,222,520)	\$ (714,737)	\$ (1,220,195)
State Dollars Recovered	\$ 93,150	\$ 309,418	\$ 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

FY 2020 ASEP Projects

	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 18, 2020 – April 6, 2020
Amended Term	November 1, 2019 – April 12, 2020	-	December 18, 2020 – March 25, 2020
State Percent Match	30.1%	60.0%	40%
State Grant	\$ 600,000	\$ 527,551	\$ 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

Fiscal Year 2019 ASEP Grant Updates and Amendments

Cody-Yellowstone Regional Airport (COD)

Scope: Weekly summer seasonal service to Chicago-O’Hare Intl. on United Express.

Category: Growth Service

Term: June 22, 2019 – September 29, 2019

Synopsis: 12 weekly roundtrip flights on United Express to Chicago-O’Hare on CRJ-700 aircraft. This project produced close to the 1,600 passengers originally projected, and only required \$41,250 in state expenditures, resulting in a recovery of \$93,150 dollars.

Cody-Yellowstone Regional Airport (COD)	
Original Term	June 22, 2019 – September 29, 2019
Amended Term	-
State Percent Match	40%
Original State Grant	\$ 134,400
Amendment	-
Total State Grant	\$ 134,400
State Grant Expended	\$ (41,250)
State Dollars Recovered	\$ 93,150
Local Dollar Match	\$ 61,876
Local Dollar Percentage Match	60%
Passengers	1,527

Riverton-Central Wyoming Regional Airport (RIW)

Scope: Daily to twice daily service to Denver Intl. (DEN) shared with Sheridan County Airport (SHR) airport on Denver Air Connection (DAC). Frequencies varied by day and season.

Category: Critical Service

Amended Term: July 1, 2018 – January 11, 2020
(Extended from ending June 30, 2019)

Status: Closed and airport moved into CPA as of January 11, 2020.

Synopsis: Originally granted \$596,937 in state funds, the DAC service to RIW and SHR faced headwinds of higher than anticipated fuel and lower realized revenue. Unlike typical guarantee agreements, the DAC contract did not have capped exposure as the revenue risk was born by the local sponsor and the state. An additional \$935,000 was granted in order to continue service through the fiscal year, and extend through January 11, 2020, at which point United Express (operated by SkyWest) began operations. \$309,417 in state dollars were recovered from this project at the end of the contract term, as revenue performance improved in the latter half of 2019.

Riverton-Central Wyoming Regional Airport (RIW)	
Original Term	July 1, 2018 – June 30, 2019
Amended Term	July 1, 2018 – January 11, 2020
State Percent Match	60%
Original State Grant	\$ 596,937
Amendment	\$ 935,000
Total State Grant	\$ 1,531,937
State Grant Expended	\$ (1,222,520)
State Dollars Recovered	\$ 309,417
Local Dollar Match	\$ 813,463
Local Dollar Percentage Match	40%
Passengers	22,946

Rock Springs/Southwest Wyoming Regional Airport (RKS)

Scope: Twice daily service to Denver Intl. (DEN) on United Express operated by SkyWest.

Category: Critical Service

Amended Term: July 1, 2018 – January 11, 2020 (Extended from ending June 30, 2019)

Status: Closed and airport transitioned to CPA.

Synopsis: Service was originally to last the 2019 fiscal year (July 1, 2018 – June 30, 2019); however, with the transition to service under the CPA, the contract was extended to end September 30, 2019. No additional funds were needed under the extension, as the market had performed above expectations.

Rock Springs-Southwest Wyoming Regional Airport (RKS)	
Original Term	July 1, 2018 – June 30, 2019
Amended Term	July 1, 2018 – September 30, 2019
State Percent Match	60%
Original State Grant	\$ 715,514
Amendment	\$ -
Total State Grant	\$ 715,514
State Grant Expended	\$ (714,737)
State Dollars Recovered	\$ 777
Local Dollar Match	\$ 477,009
Local Dollar Percentage Match	40%
Passengers	60,010

Sheridan County Airport (SHR)

Scope: Daily service to Denver Intl. (DEN) shared with Riverton Regional Airport (RIW) airport on Denver Air Connection (DAC). Frequencies varied by day and season.

Category: Critical Service

Amended Term: July 1, 2018 – January 11, 2020
(Extended from ending June 30, 2019)

Status: Closed and airport moved into CPA as of January 11, 2020.

Synopsis: Similar to Riverton (RIW), this project was originally granted \$596,937 in state funds, the DAC service to RIW and SHR faced headwinds of higher than anticipated fuel and lower realized revenue. Unlike typical guarantee agreements, the DAC contract did not have capped exposure as the revenue risk was born by the local sponsor and the state. An additional \$935,000 was granted in order to continue service through the fiscal year and extend through January 11, 2020, at which point United Express (operated by SkyWest) began operations. \$311,742 in state dollars were recovered from this project at the end of the contract term, as revenue performance improved in the latter half of 2019.

Sheridan County Airport (SHR)	
Original Term	July 1, 2018 – June 30, 2019
Amended Term	July 1, 2018 – January 11, 2020
State Percent Match	60%
Original State Grant	\$ 596,937
Amendment	\$ 935,000
Total State Grant	\$ 1,531,937
State Grant Expended	\$ (1,220,195)
State Dollars Recovered	\$ 311,742
Local Dollar Match	\$ 815,013
Local Dollar Percentage Match	40%
Passengers	32,109

Fiscal Year 2020 ASEP Grants

With the transition of Gillette, Riverton, Rock Springs and Sheridan to the Capacity Purchase Agreement (CPA), there were three grants that took place during FY 2020. One for Jackson Hole Airport and two for Cheyenne Regional Airport due to COVID-19. Cheyenne suspended its service to DFW and then transitioned to United Express operated by SkyWest with service to Denver Intl. Airport (DEN) from American Eagle operated by SkyWest with service to Dallas/Ft. Worth (DFW).

Cheyenne Regional Airport (CYS)

Scope: Daily service to Dallas/Ft. Worth Intl. Airport (DFW) on American Eagle operated by SkyWest Airlines was discontinued due to COVID-19 and the remaining funds were recovered into the ASEP. Service will transition to once daily flights to Denver Intl. Airport (DEN) moving to twice daily in March and running through May 31st, 2020 or when runway reconstruction will take place. Service is expected to resume after reconstruction is done.

Category: Critical Service

American Eagle Term : November 1, 2019 – April 12, 2020.
Discontinued early due to COVID-19.

United Express Term: November 11, 2020 – May 31, 2021

Status: Closed and transitioned to United Express beginning November 11, 2020.

	Cheyenne Regional Airport (CYS)	Cheyenne Regional Airport (CYS)
Airline	American Eagle Operated by SkyWest	United Express Operated by SkyWest
Original Term	November 1, 2019 – October 31, 2020	November 11, 2020 – May 31, 2021
Amended Term	November 1, 2019 – April 12, 2020	-
State Percent Match	30.1%	60.0%
State Grant	\$ 600,000	\$ 527,551
State Dollars Recovered	\$ 360,298	\$ -
Local Dollar Match	\$ 1,393,355	\$ 351,701
Local Dollar Percentage Match	69.9%	40.0%
Passengers	9,107	22,000 (Est)

Jackson Hole Airport (JAC)

Scope: Additional capacity on American Airlines to Dallas/Ft. Worth (DFW) for the peak winter months. Service was discontinued early in March due to the COVID-19 outbreak. No state funds were recovered.

Category: Growth Service

Term: December 18th, 2019 – April 6th, 2020.
Discontinued in March due to COVID-19.

Status: Closed

Jackson Hole Airport (JAC)	
Airline	American Airlines
Original Term	December 18, 2020 – April 6, 2020
Amended Term	December 18, 2020 – March 25, 2020
State Percent Match	40%
State Grant	\$ 140,000
State Dollars Recovered	\$ -
Local Dollar Match	\$ 210,000
Local Dollar Percentage Match	60.0%
Passengers	12,677

Capacity Purchase Agreement Grants and Status

October 2019 marked the beginning of the CPA agreement with service on United Express operated by SkyWest, as flights continued under the same branding at Rock Springs – Southwest Wyoming Regional Airport and Gillette – Northeastern Wyoming Regional Airport. Sheridan Regional Airport and Riverton – Central Wyoming Regional Airport transitioned to United Express on January 12, 2020. For the first few months of the CPA prior to COVID-19, the program was working as intended, and substantially more passengers were carried to Wyoming airports for less cost. The CPA helped bring 8,282 additional passengers through Wyoming airports, all while reducing financial outlay from the state and local communities. In Sheridan and Riverton, the total cost per passenger was reduced by 60%, the number of passengers increased by 43% to the two airports and the overall costs were reduced by 9%.

As the COVID-19 pandemic began to significantly affect air travel to the state, flights were reduced in order to better match capacity to demand starting in late March. WYDOT, the local communities, and SkyWest continued to reevaluate capacity during the effects of COVID-19, and were able to reduce financial exposure to the CPA. Because the reductions were put into place proactively, the state was able to recover \$257,269 in state funds for the first term of the CPA, which will be available for future grants. The table below provides a summary of the first term of the CPA.

	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 Dollar Match	\$ 496,854	\$ 455,424	\$ 497,440	\$ 429,846
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

More than 68,000 passengers used service provided under the CPA from October 2019, through June, 2020. While COVID-19 did dampen passenger ridership for the second half of the first term, initial results were encouraging as evidenced in the reduction of the total cost per passenger to Sheridan and Riverton below:

Cost Per Passenger	2019 (ASEP)	2020 (CPA)
Sheridan	\$ 89.17	\$ 42.29
Riverton	\$ 111.72	\$ 38.55

When comparing CPA airports for months before and after the CPA (October-February for Gillette and Rock Springs and January-February for Sheridan and Riverton), an additional 9,135 passengers transited through WY airports while providing a savings of \$75,562 in state dollars.

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



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Appendix

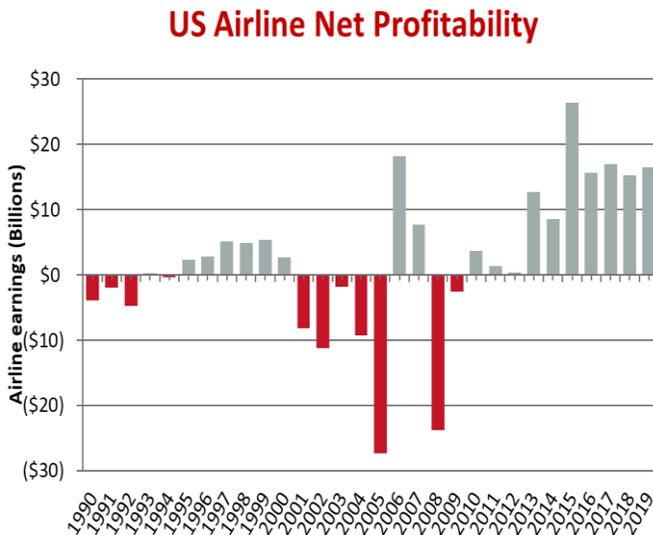
Mead and Hunt Industry Analysis

September 1st, 2020

COVID-19 Airline Industry Update

At the beginning of 2020, the U.S. airline industry had been enjoying the greatest run of success that this industry has ever seen. From 2010 to 2019, the US industry had generated \$120B in net profits. The airlines had a record year in 2019 in terms of passengers and revenues. In January and February of 2020, demand was up year over year, and all signs suggested another record year on the way

The fundamentals of the industry were incredibly strong driven by these five factors:



1. Capacity restraint aided by industry consolidation dating back to 2008-2010
2. Lower fuel prices
3. Significant Increases in ancillary revenue
4. Fleet renewal to more cost-efficient aircraft
5. A strong, growing economy amid the longest sustained growth in U.S. history

And then, beginning in mid-March the Corona virus impacts on the airline industry came crashing down.

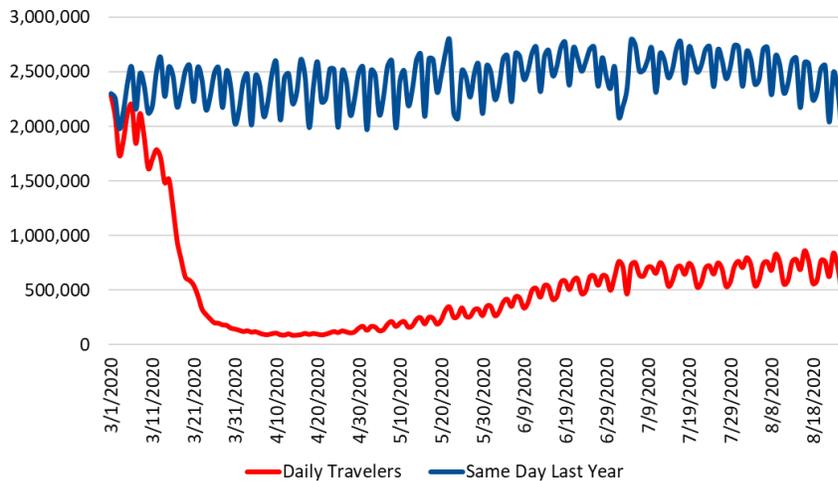
This update looks at the major industry impacts we've seen over the last 6 months and their implications going forward. Beginning mid-March, the bottom started falling out for air travel demand as COVID-19 cases began ramping up. By the end of March, air travel demand was down over 90%.

By mid-April, demand bottomed out down over 95% vs. 2019 levels. From Mid-April onwards, demand began a slow pace of recovery. June and July saw reasonable throughput progress, but by mid-August, as virus cases resurged throughout the U.S., demand recovery has started to stall out again.



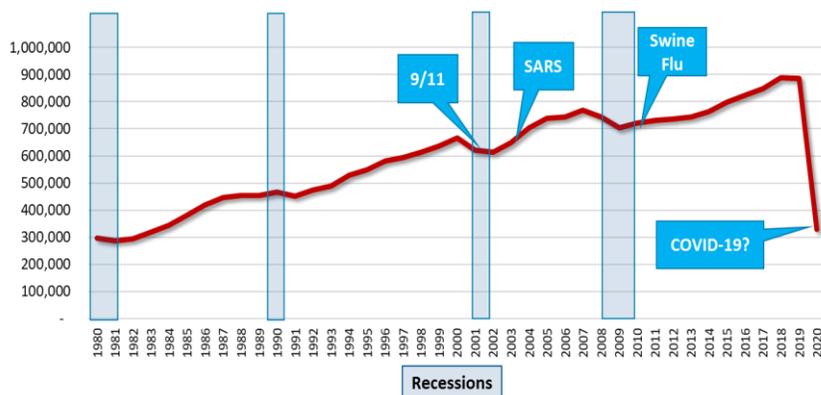
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TSA Total U.S. Passenger Throughput



	YoY Chg
January	5.5%
February	2.1%
March	(52%)
April	(95%)
May	(90%)
June	(81%)
July	(74%)
August	(71%)

U.S. Airline Passenger Traffic – Last 40 Years



To put the demand fall-off in perspective, what has happened over the last 6 months has erased 40 years of traffic growth for the industry. No other external event or influence even comes close to this.

Our current outlook suggests that the U.S. industry will see over \$120 billion in domestic revenue lost in 2020. International revenues will be hit even harder.

The airlines have wasted no time in responding. Schedules from late March onwards were being reworked week-by-week, and capacity was pulled down as quickly as possible. Airlines began parking and retiring aircraft to reduce costs and capacity as demand withered away. Over 50% of the entire U.S. airline fleet was grounded for the month of May.

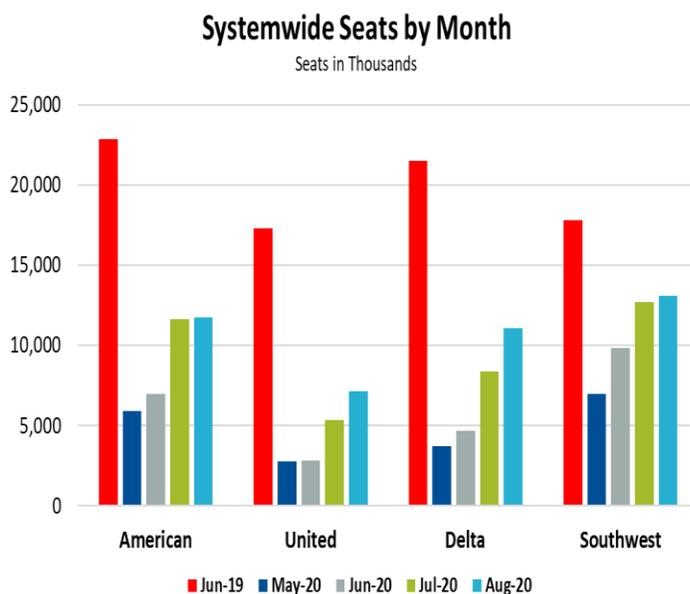
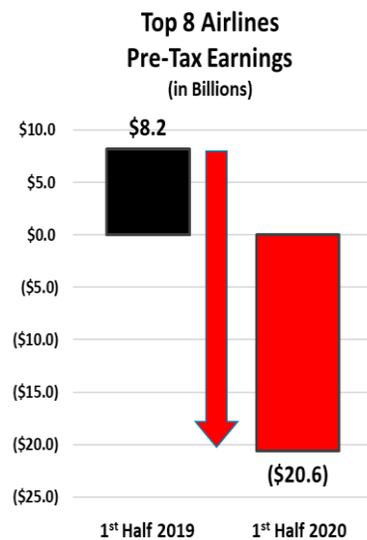
Actions also went far beyond just capacity cuts and fleet reductions. Airlines began offering voluntary leaves and early retirement packages. The U.S. Cares Act offered \$50 billion in support for the airlines in exchange for minimum service guarantees and deferring furloughs until September 30. Many of the largest airlines, however, have massive furlough programs underway to take effect once that September 30th deadline passes. Recent intelligence

suggests that as high as 30% of the work force at the three major network airlines may disappear by the end of 2020.

In addition to changes in the fleet and work force, airlines have been simplifying onboard service, implementing massive new cleaning and safety processes, re-focusing on cargo opportunities, shutting down under-utilized facilities and terminals, renegotiating with vendors and airports and suspending any non-essential capital spending. The massive list of actions continues to grow.

Despite the Cares Act support and all the actions taken by the airlines, the financial damage for the first half of 2020 was massive. The top eight publicly traded airlines saw almost a \$30B drop in pre-tax profits.

Revenues dropped by over 86% in the 2nd Quarter as load factors fell over 50 percentage points on average. Keep in mind that the first two months of 2020 were performing better than last year, so all this damage was done in just three and a half months. As a result of this new precarious position, airlines lost 70% of their market value as stock prices plummeted. While stocks have recovered considerably since they bottomed out in mid-May, the market values are still down roughly 50% from pre-COVID values.



No doubt, airlines have been rebuilding their networks since May, but as of the end of August, only 50% of capacity has been restored by the top four airlines.

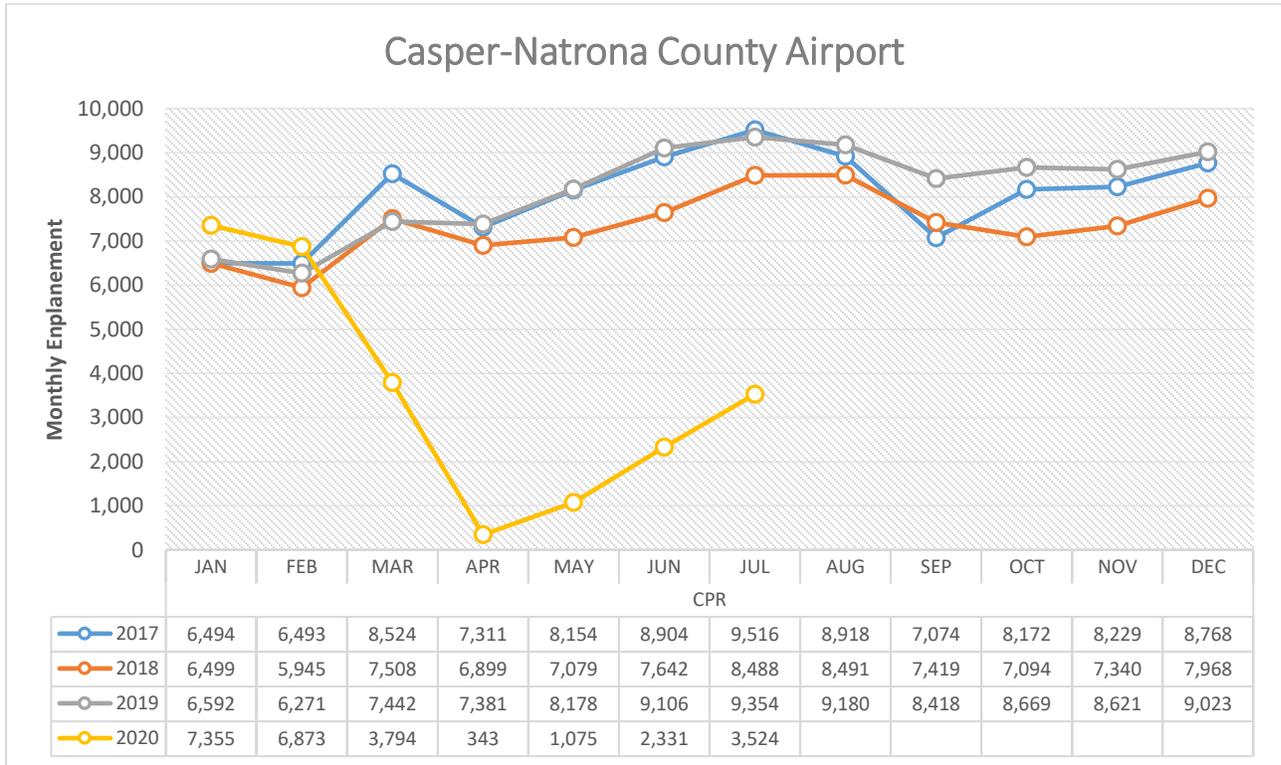
Schedules loaded for September suggest that the airlines are pulling back down from the August levels, as demand in September and the Fall softens. October could be reduced even further.

There have been some very clear trends emerging in the recovery efforts so far.

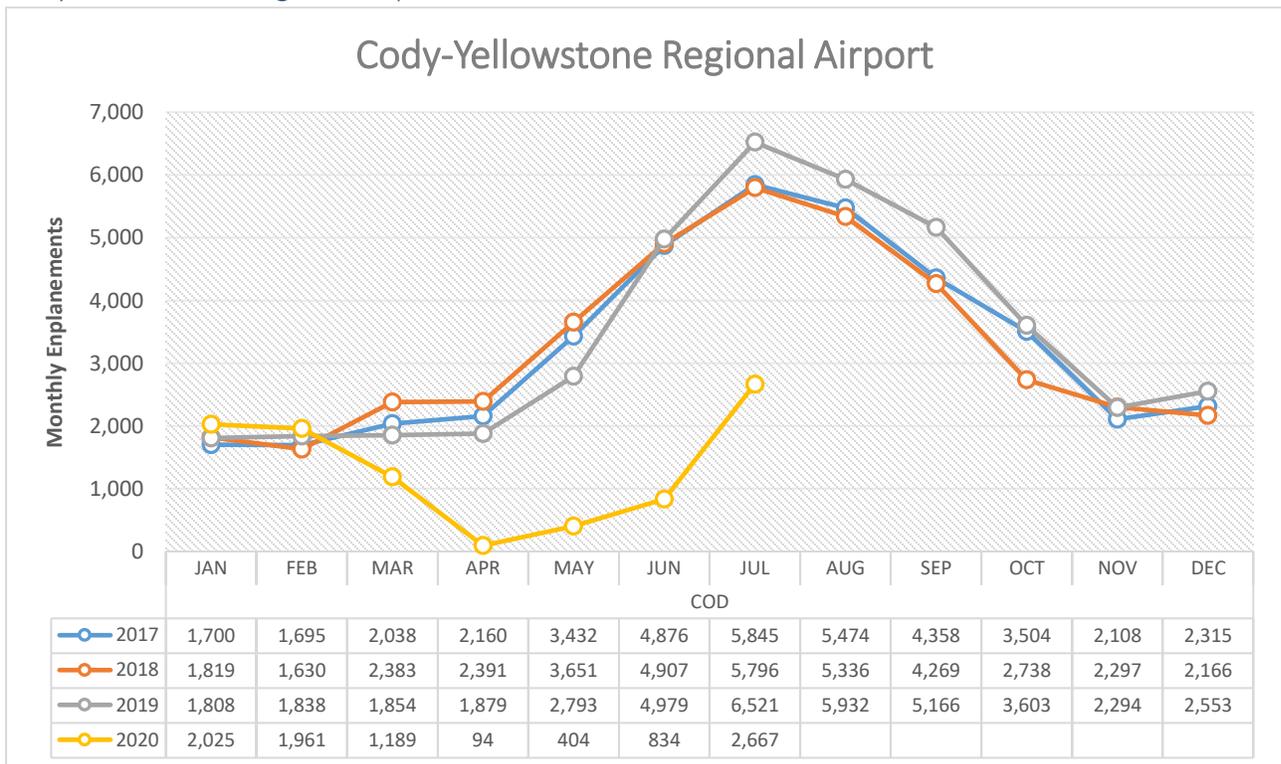
- First, leisure demand is clearly coming back faster than business, driven by several factors:
 - Weak aircraft loads and travel demand are driving aggressive pricing actions.
 - Pent-up demand as people look to escape confinement is driving a significant portion of the air travel demand today.
 - We're also seeing a younger demographic of travelers looking for leisure activities.
 - This is most pronounced in beach and mountain destinations. Florida and Carolina beaches have seen demand recovery stronger than most places. Key mountain states have also enjoyed stronger recovery to-date.
- Airlines like Delta and American have focused on rebuilding their largest hubs first.
 - Delta's Atlanta, Minneapolis, Detroit, and Salt Lake City hubs are regaining capacity faster than the rest of Delta's system.
 - Similarly, American is focusing on rebuilding its Dallas/Ft. Worth and Charlotte hubs.
- United has recently taken a different tact. They recently announced a host of point-to-point markets to Florida and other leisure destinations to take advantage of the leisure demand recovery.
- The Ultra-low-cost airlines like Allegiant have brought capacity back much faster than the traditional airlines with August system-wide seats increasing over 2019 levels.
- The remaining international markets being flown have largely been limited to major transoceanic gateways like London, Paris, Frankfurt, Amsterdam, Tokyo, and Seoul, or select islands in the Caribbean.
- Smaller markets in the U.S. are struggling to hang on to the limited service they had pre-COVID, and airlines are taking a very close look at whether these markets will be sustainable going forward.
- American Airlines recently announced it is suspending service to 15 smaller markets in October as it seeks additional government funding.

These recovery trends are driving a structural change in the airline industry moving forward.

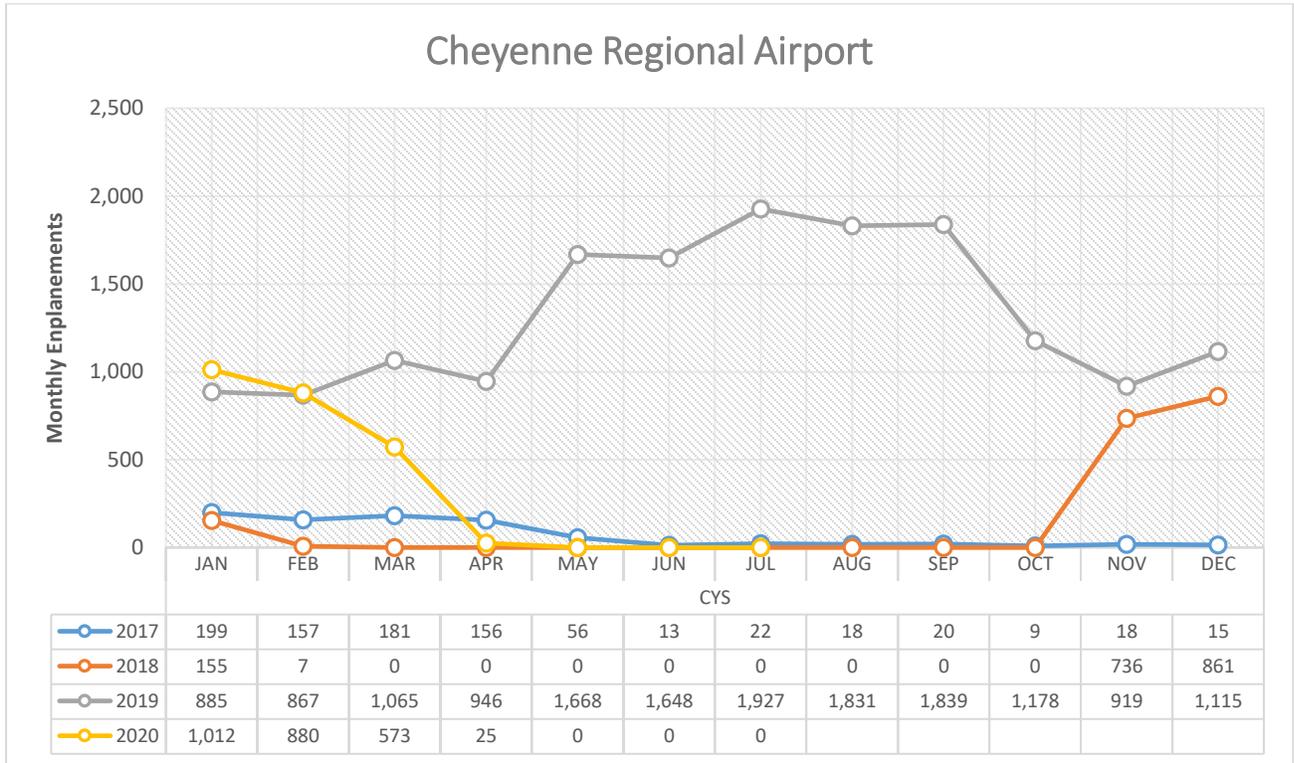
Airport Enplanement Numbers
Casper – Natrona County Airport



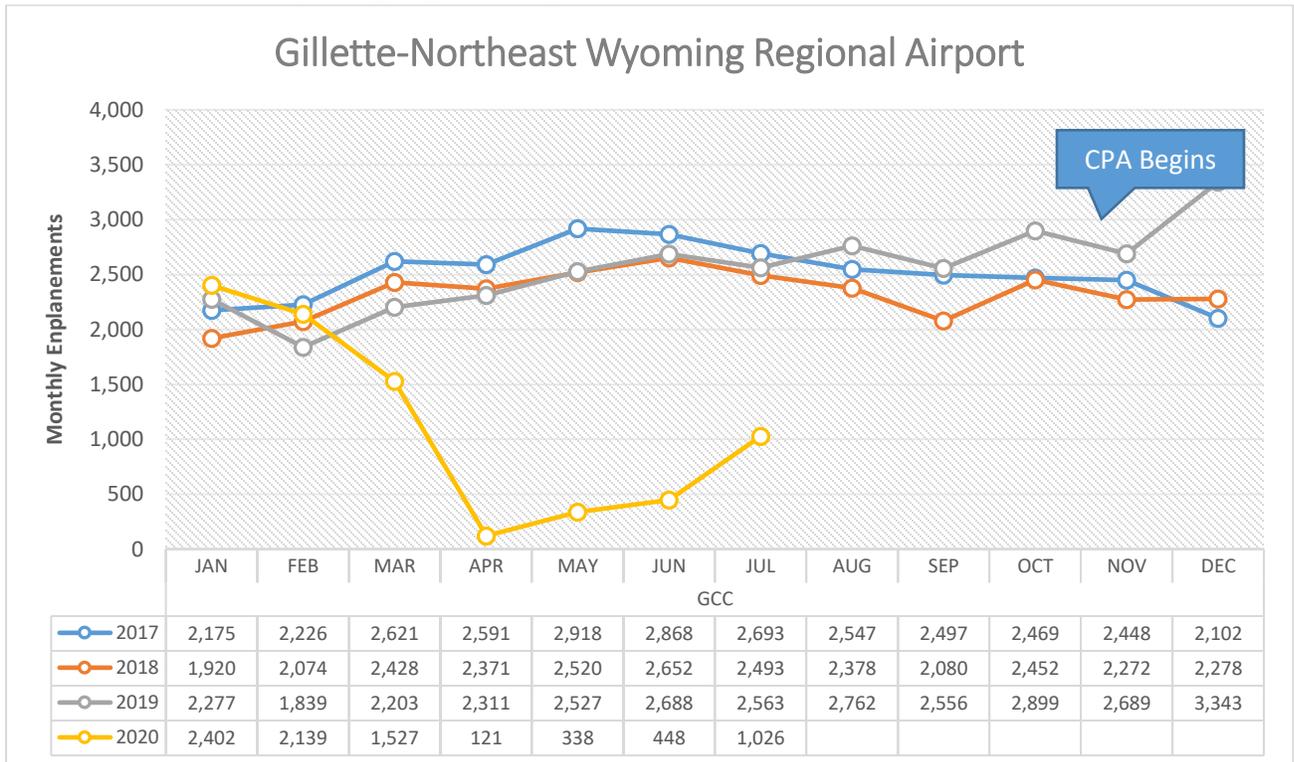
Cody-Yellowstone Regional Airport



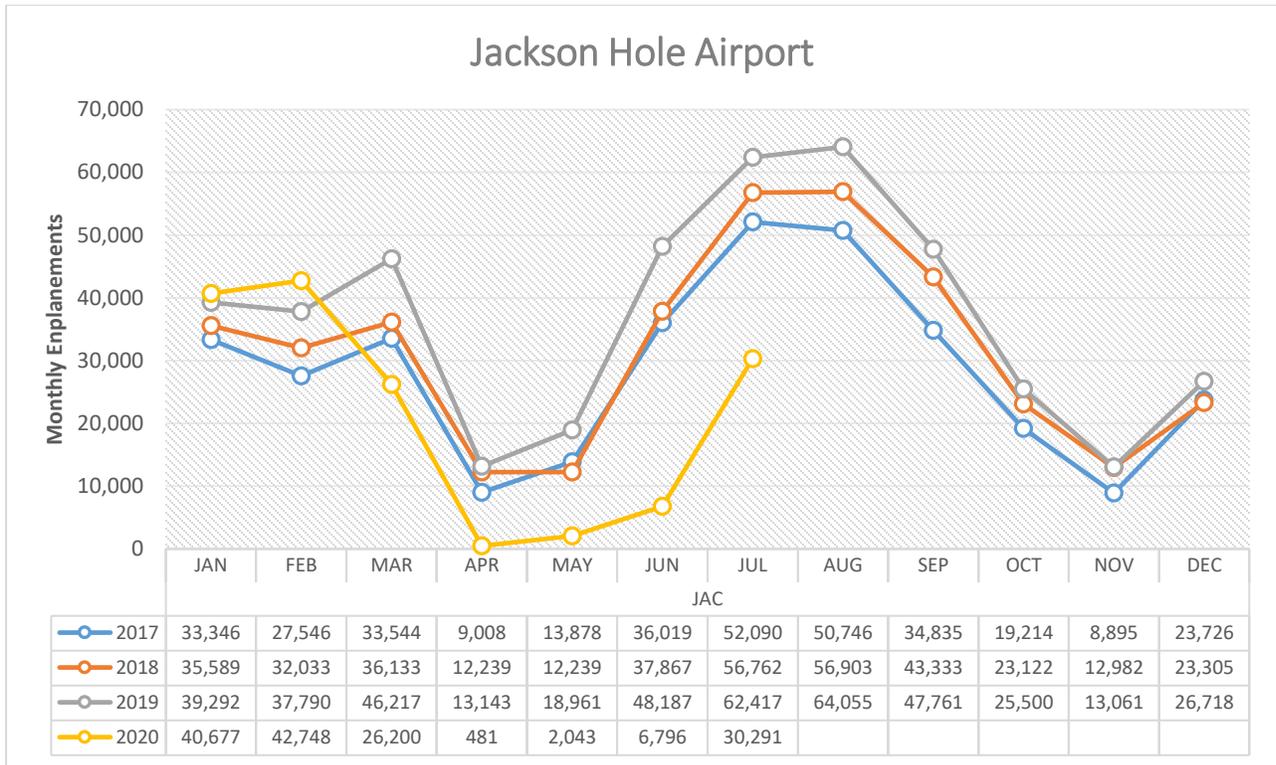
Cheyenne Regional Airport



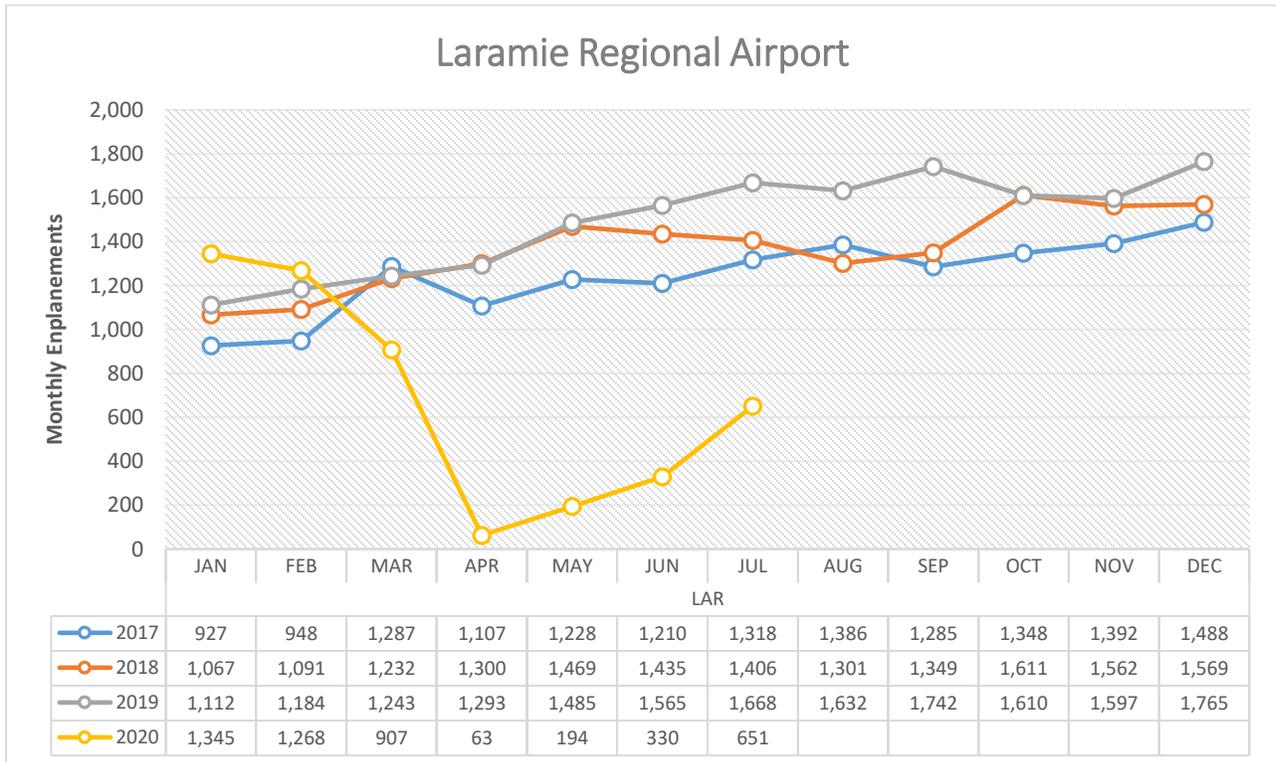
Gillette – Northeast Wyoming Regional Airport



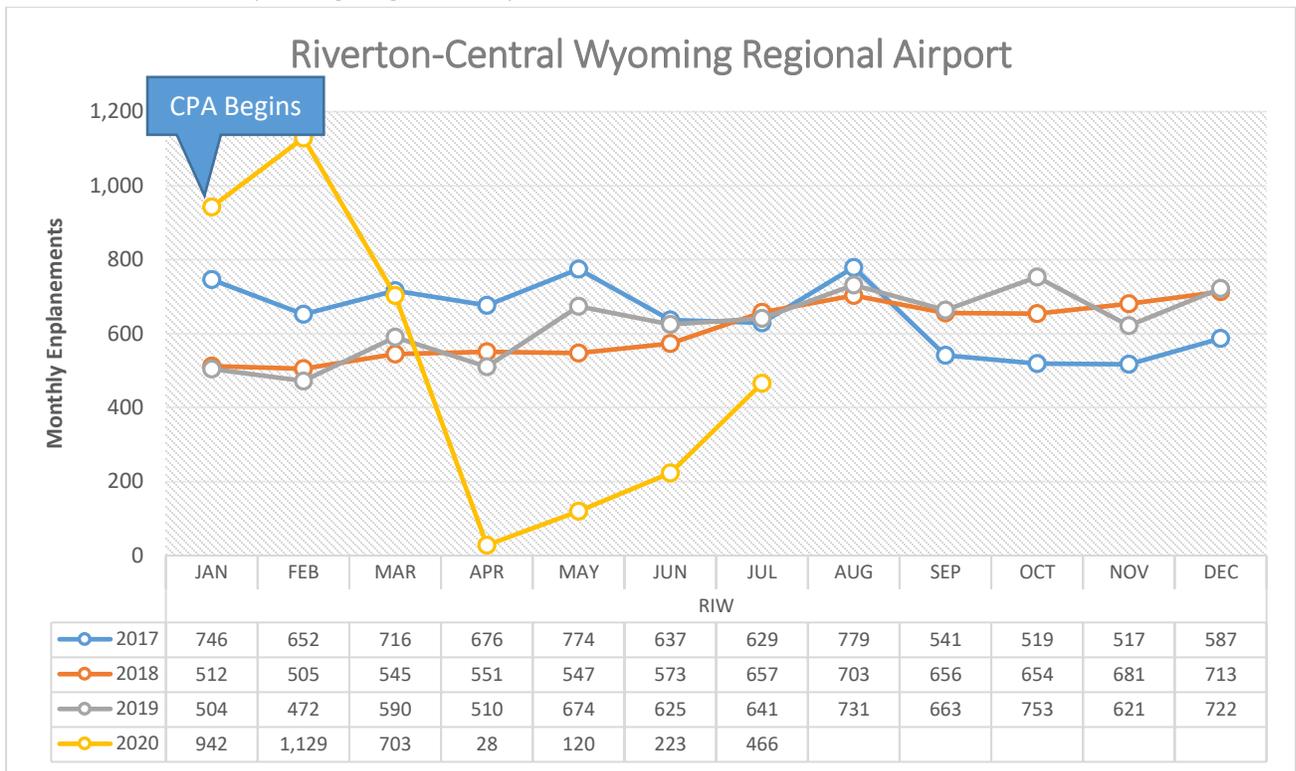
Jackson Hole Airport



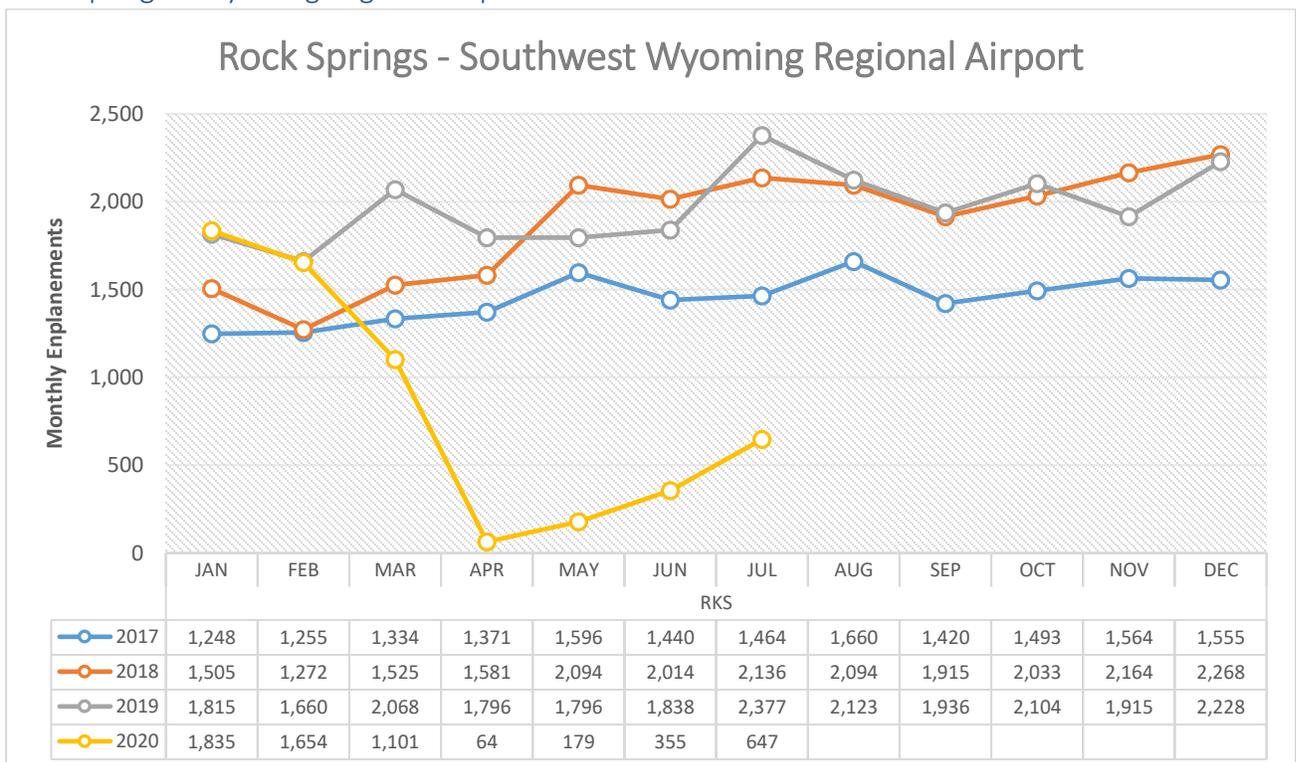
Laramie Regional Airport



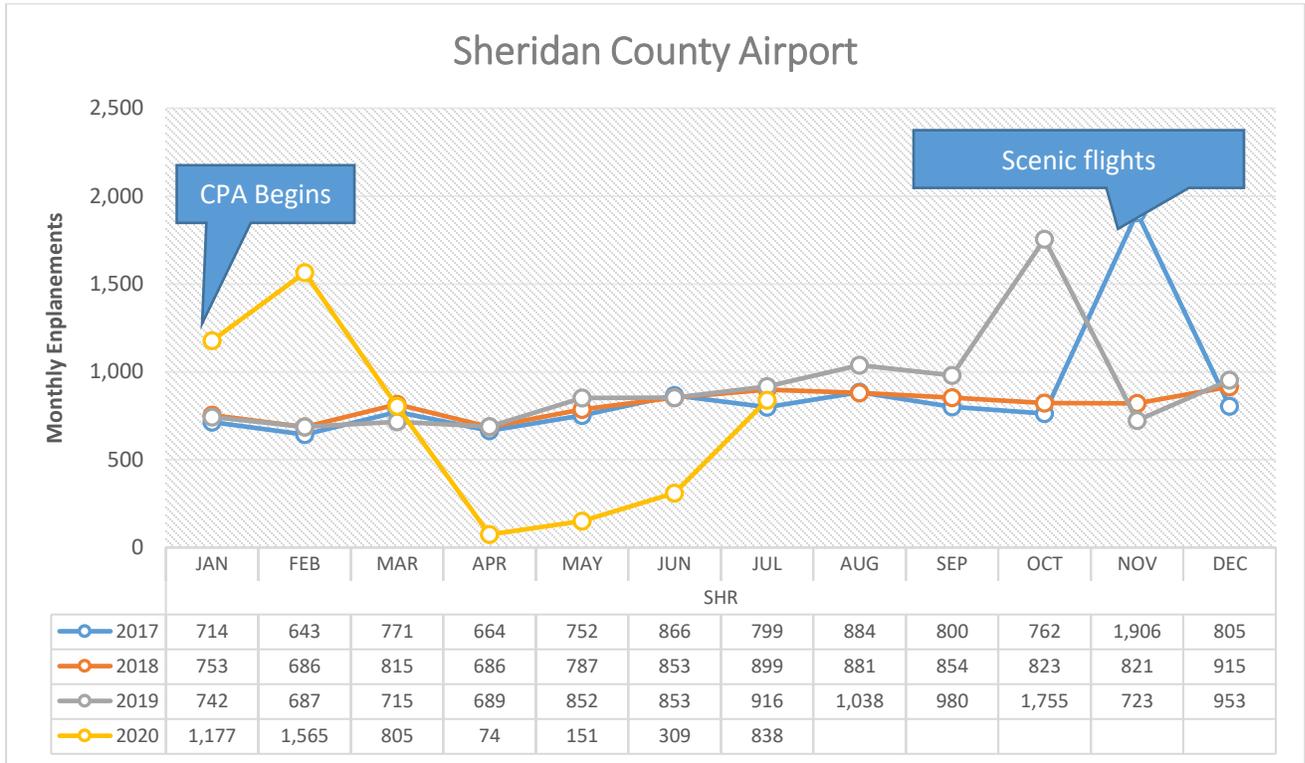
Riverton-Central Wyoming Regional Airport



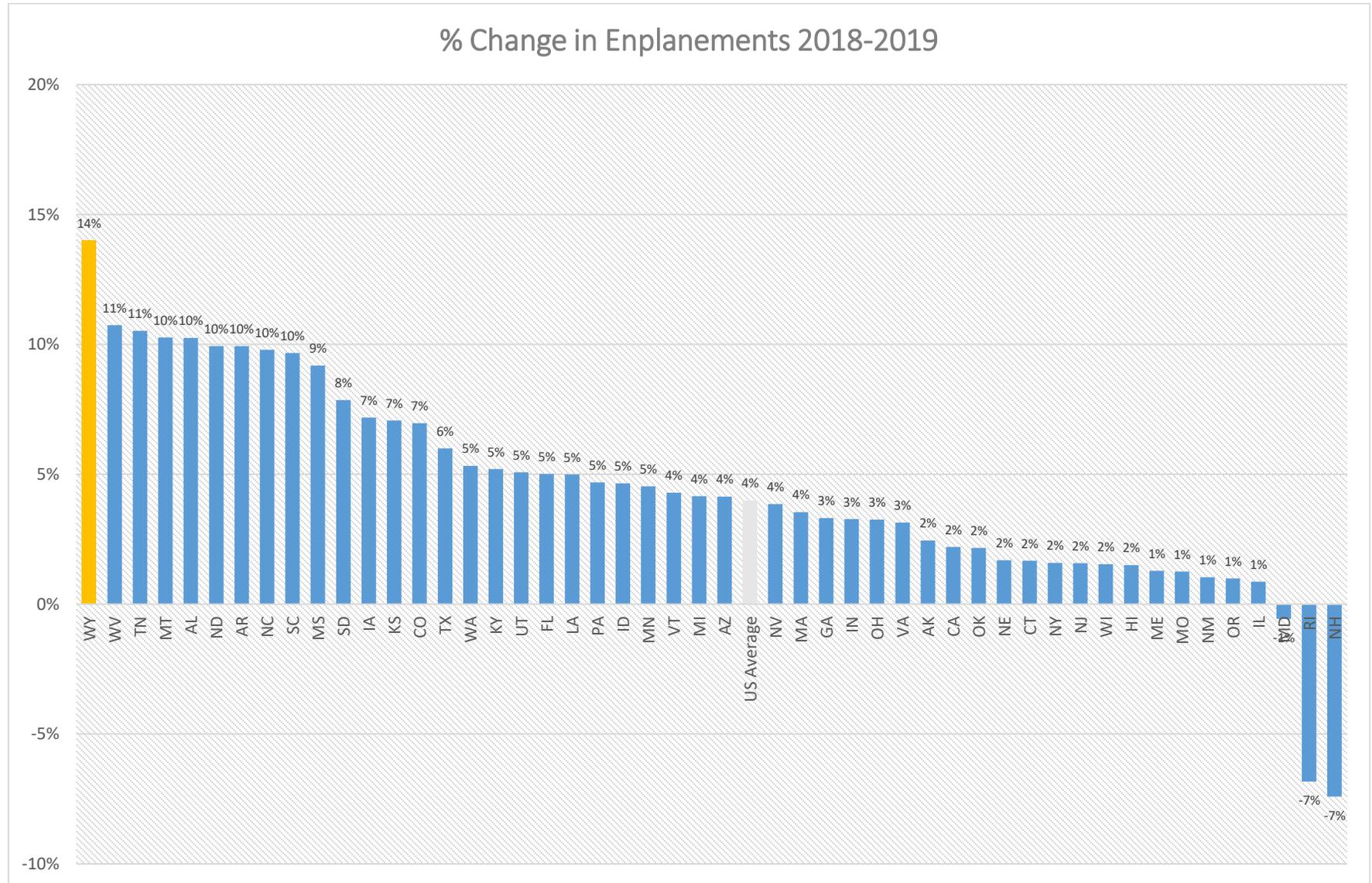
Rock Springs – Wyoming Regional Airport



Sheridan County Airport



Percentage Change Year-over-year of All US States



Source: 2019 FAA Preliminary Enplanements Report