



Reinstatement of Air Service to Chautauqua County Jamestown Airport

Exploring Options for Commercial Air Service at JHW

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AVIATION WEEK
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Reinstatement of Air Service to Chautauqua County Jamestown Airport (JHW)



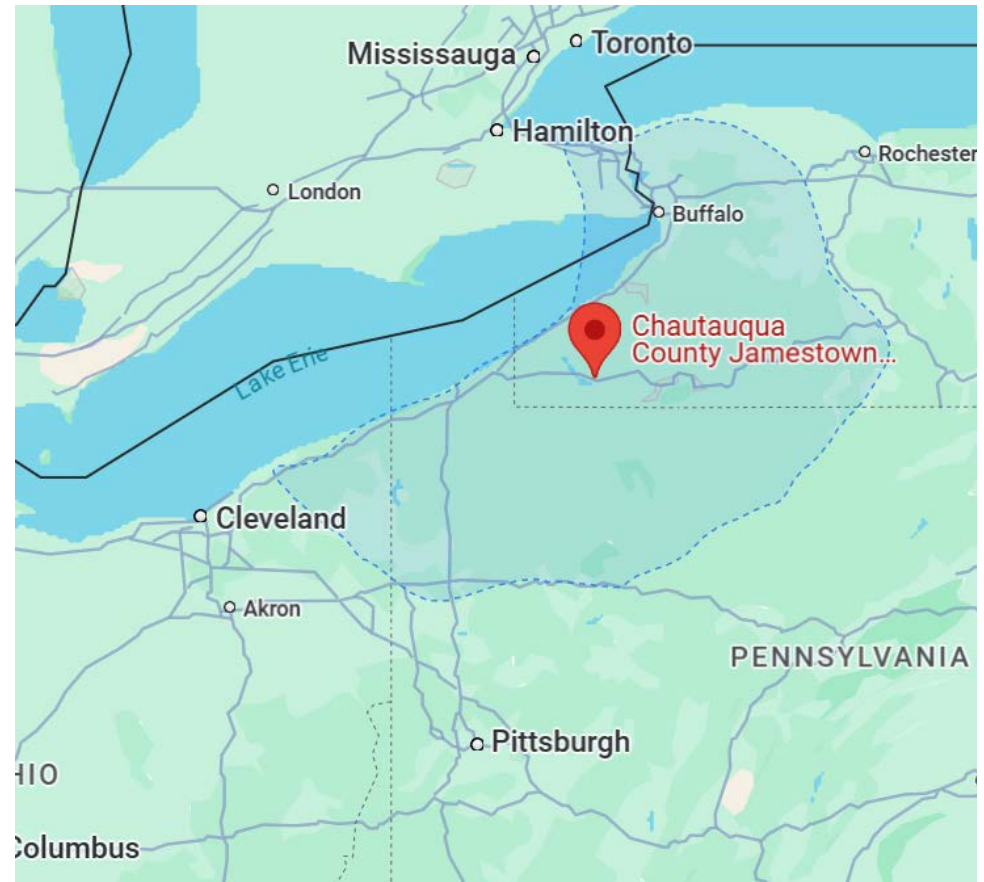
- Regional Overview
- Regional Air Service Competition
- Passenger Leakage Study Overview
- Air Service Reinstatement Pathways
- Airline Opportunities
- Next Steps and Action Plan
- Conclusions

Regional Overview



Regional Overview – Geography and Demographics

- Chautauqua County, New York, located in the state's southwestern corner.
- Strategically situated near major population centers like Buffalo, Erie, Cleveland, and Pittsburgh.
- JHW Airport is centrally located with direct road access (I-86 corridor).
- Population of Chautauqua County: approximately 126,000.



Regional Overview – Economic and Tourism Importance



- Major industries:
 - Manufacturing, Agriculture Health services, and Education

- Tourism highlights:
 - Chautauqua Institution (annual visitors: ~250,000)
 - Lake Erie wine country and outdoor recreation hubs
 - National Comedy Center (attracts domestic and international visitors)

- Economic impact of air service:
 - Enhances regional business opportunities
 - Increases tourist accessibility

Regional Overview – Historical Air Service Context

- JHW previously supported commercial air service under the Essential Air Service (EAS) program
- Air service ceased in 2018, leading to increased passenger leakage to nearby airports
- Airport infrastructure is maintained and certified for commercial operations (FAA Part 139)
- The current absence of air service hinders economic and tourism growth potential
- This project evaluates the viable pathways to reinstate commercial air service



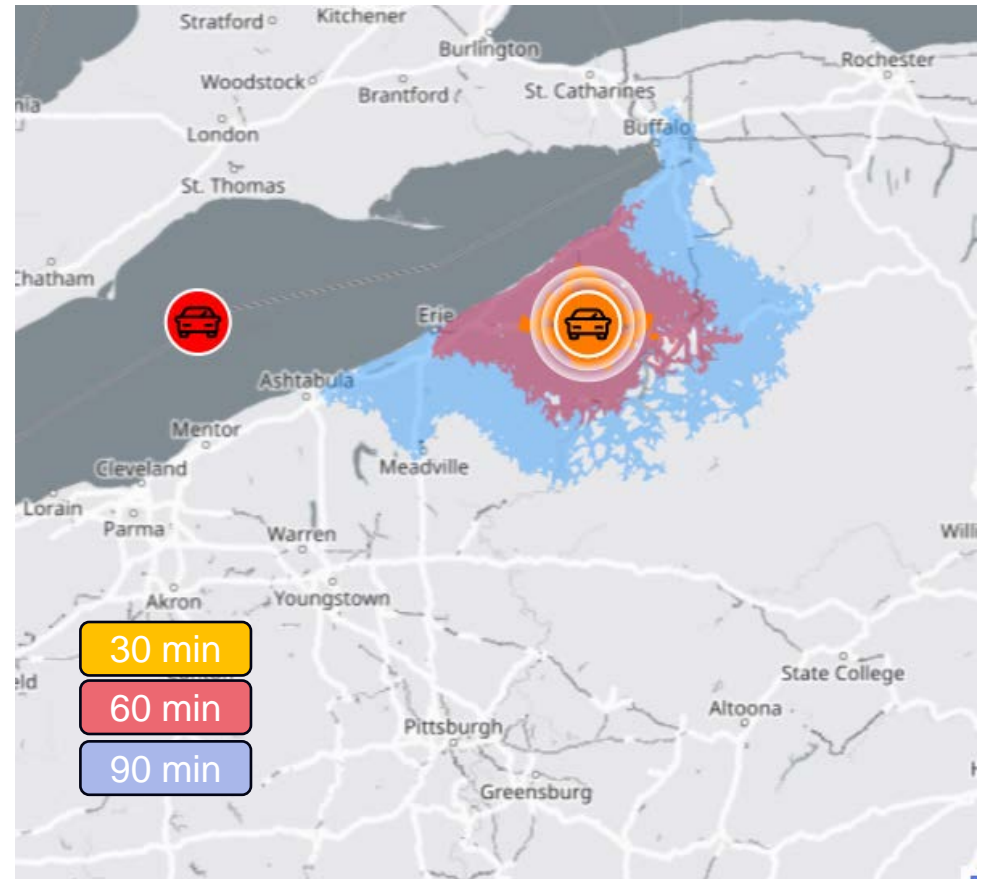
Over 60% of catchment area residents live within 45 miles of JHW, representing significant demand potential.

Regional Air Service Competition



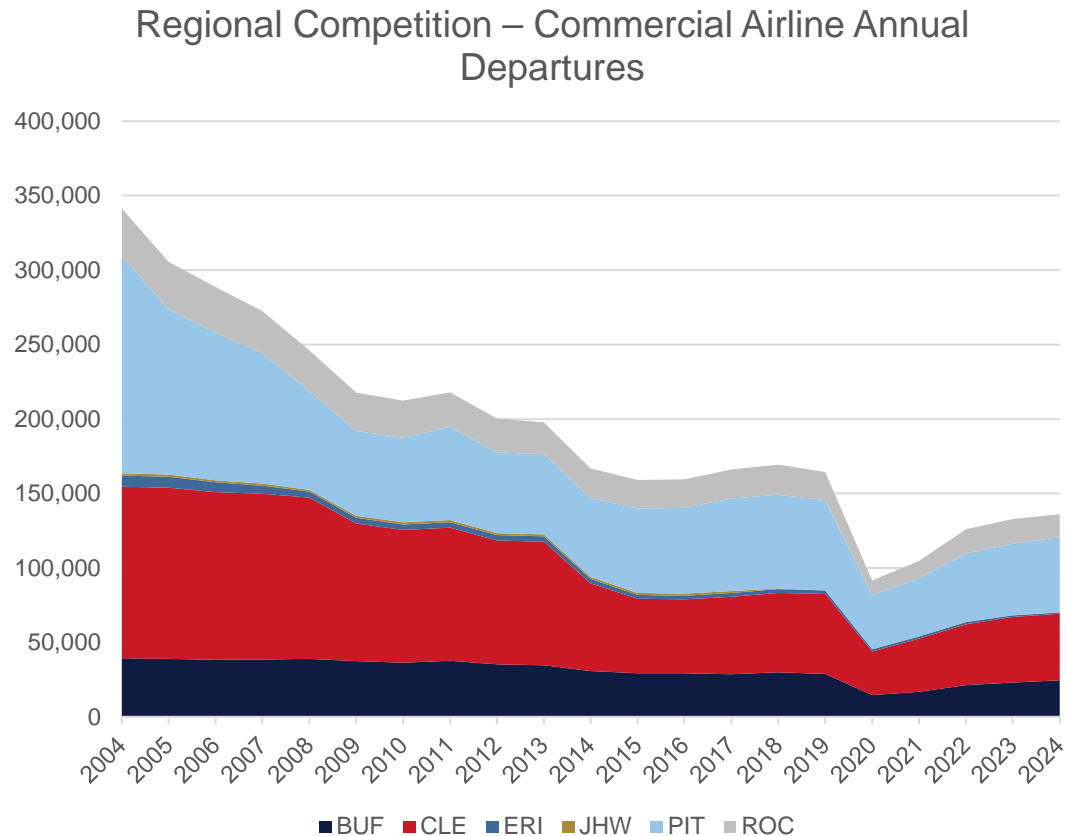
Regional Competition – Key Competing Airports

- Nearby airports impacting JHW's catchment area:
 - Buffalo Niagara International Airport (BUF) – 75 miles (1.5 hr)
 - Erie International Airport (ERI) - 50 miles (1 hr)
 - Pittsburgh International Airport (PIT): 135 miles (2 hr 15 min)
 - Cleveland Hopkins International Airport (CLE) - 115 miles (2 hr)
 - Rochester International Airport (ROC) - 135 miles (2 hr 15 min)



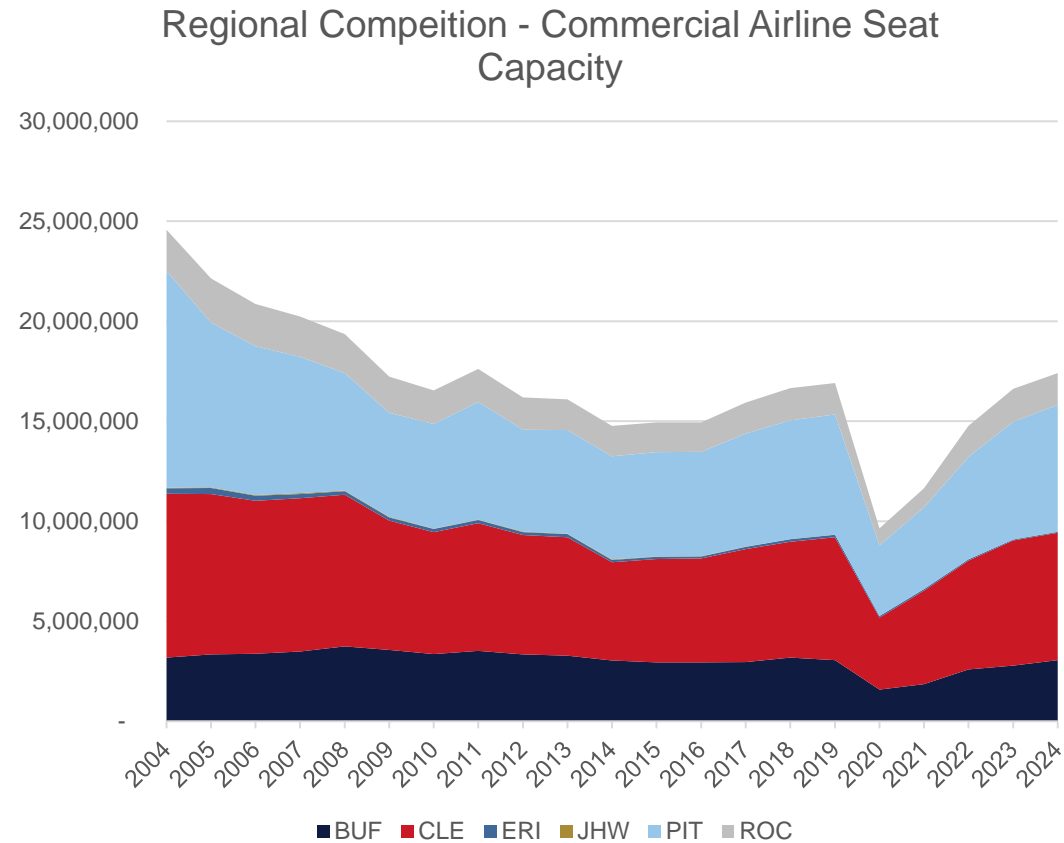
Competitor airports attract passengers due to larger route networks, competitive fares, and airline choices.

Regional Overview – Regional Commercial Departures



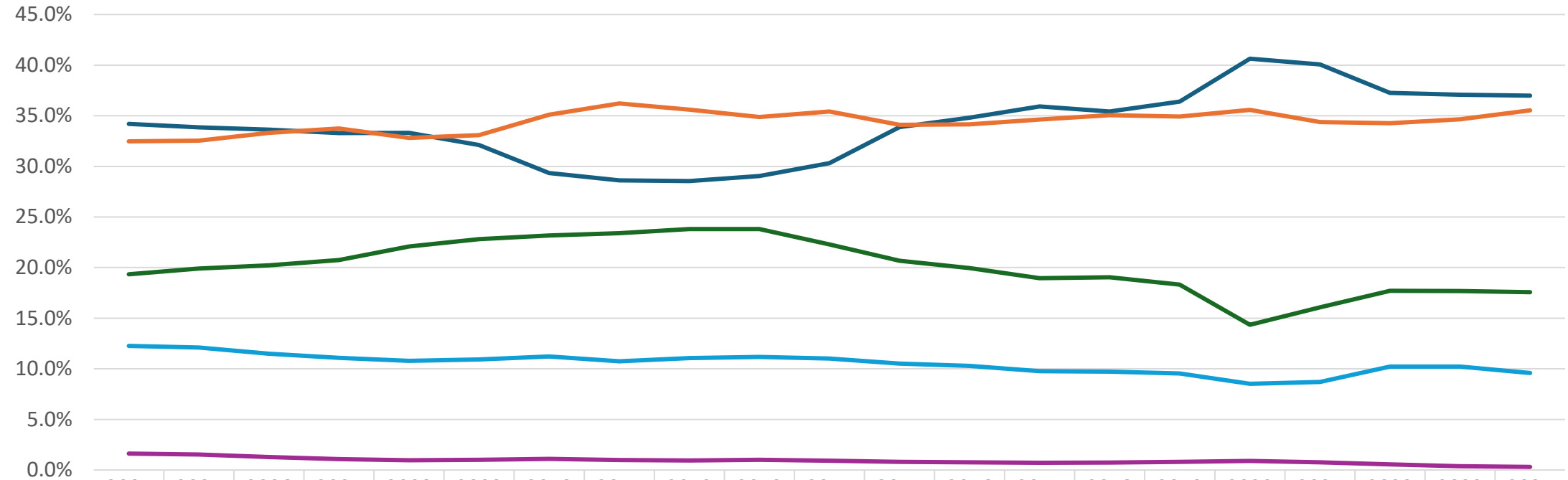
- Since 2004 regional capacity has declined, primarily due to the dehubbing of CLE by Continental Airlines (United Airlines merger) between 2008 and 2014.
- Over the past 10 years, commercial airline departures have declined at a CAGR of **2%**.
- In 2014, JHW represented 1% of all regional departures compared to BUF at 19%, CLE at 35%, PIT at 32%, ROC at 12%, and ERI at 2%.
- Departure shares remained directionally the same since 2014, however 2024 overall departures remain 17.2% below 2019 (pre-pandemic) levels.

Regional Overview – Regional Commercial Seat Capacity



- Since 2004 regional seat capacity has declined, primarily due to the dehubbing of CLE by Continental Airlines (United Airlines merger) between 2008 and 2014.
- Over the past 10 years, commercial airline seat capacity has increased at a CAGR of 1.7%.
- In 2024, BUF was 19% of regional seat capacity, with CLE at 32%, ERI at 1%, PIT at 36% and ROC at 12%.
- 2024 overall regional seat capacity is 2.9% above 2019 (pre-pandemic) levels.

Regional Overview – Airport Passenger Share



	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
CLE	34.2%	33.8%	33.6%	33.3%	33.3%	32.1%	29.3%	28.6%	28.5%	29.1%	30.3%	33.9%	34.8%	35.9%	35.4%	36.4%	40.6%	40.1%	37.3%	37.1%	37.0%
PIT	32.5%	32.5%	33.3%	33.7%	32.8%	33.1%	35.1%	36.2%	35.6%	34.9%	35.4%	34.1%	34.2%	34.6%	35.1%	34.9%	35.6%	34.4%	34.3%	34.6%	35.5%
BUF	19.3%	19.9%	20.2%	20.8%	22.1%	22.8%	23.2%	23.4%	23.8%	23.8%	22.3%	20.7%	20.0%	18.9%	19.0%	18.3%	14.4%	16.1%	17.7%	17.7%	17.6%
ROC	12.3%	12.1%	11.5%	11.1%	10.8%	10.9%	11.2%	10.7%	11.1%	11.2%	11.0%	10.5%	10.3%	9.8%	9.7%	9.6%	8.5%	8.7%	10.2%	10.2%	9.6%
ERI	1.6%	1.5%	1.3%	1.1%	1.0%	1.0%	1.1%	1.0%	1.0%	1.0%	0.9%	0.8%	0.8%	0.7%	0.7%	0.8%	0.9%	0.8%	0.6%	0.4%	0.3%

— CLE — PIT — BUF — ROC — ERI

Passenger Leakage Study Overview



Passenger Leakage Study – Catchment Area Methodology

- **Data Sources and Methodology**

- Data combines travel web searches, DOT data, and Census
- Uses machine learning for skew correction and reallocation of postal code traffic.
- Corrects or removes corporate and errant postal codes.

- **Postal Code Representation**

- Postal codes reflect **residential consumer home locations, Base Data Creation**
- Built on a **point-of-sale basis**: postal code, departure/arrival airports, passenger volumes.
- Visitor data is not assumed to correlate directly with residential zip codes.

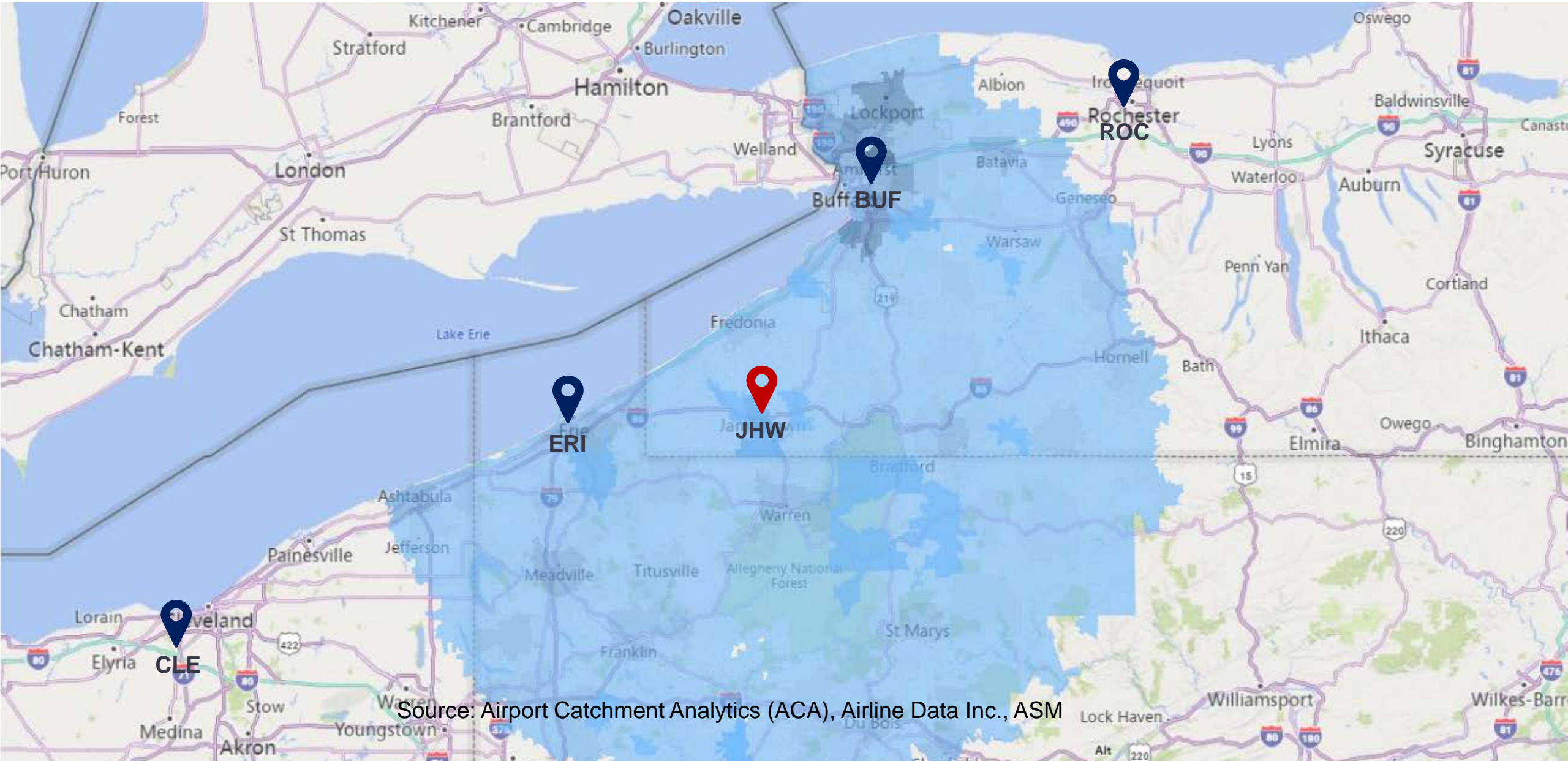
- **Resident/Visitor Split Correction**

- Corrects one-way ticket bias (common in Florida) using population and hospitality-based metrics.

- **Airline Detail**

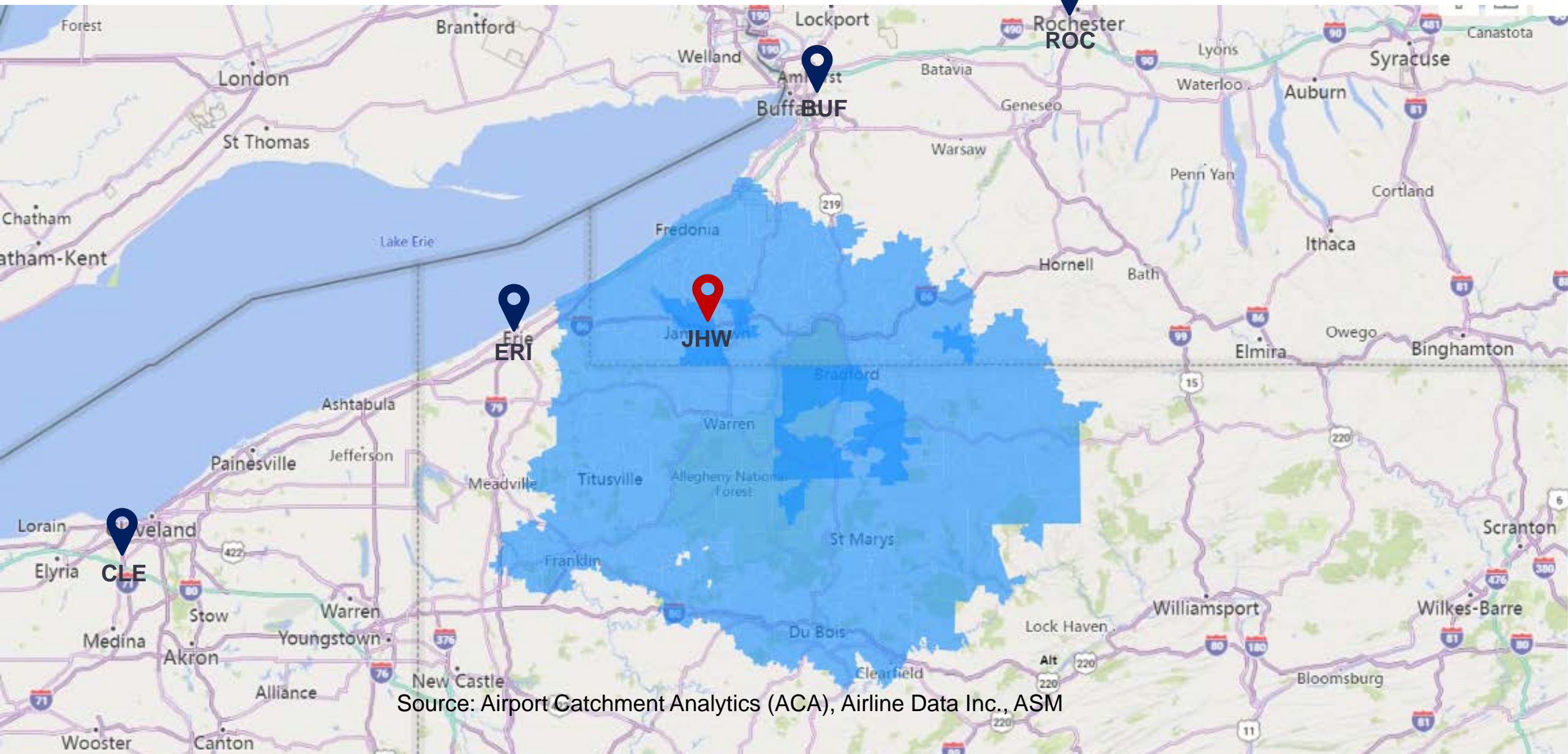
- Enhanced airline splits derived from search data, Census income, and fare levels.

Total Passengers by Zip Code for JHW Catchment Area, 90 mi



Source: Airport Catchment Analytics (ACA), Airline Data Inc., ASM

Proposed Custom Catchment Area for JHW Catchment



Source: Airport Catchment Analytics (ACA), Airline Data Inc., ASM

916 PDEW (60.8%)

Resident Traffic in JHW Catchment
Custom Catchment Area

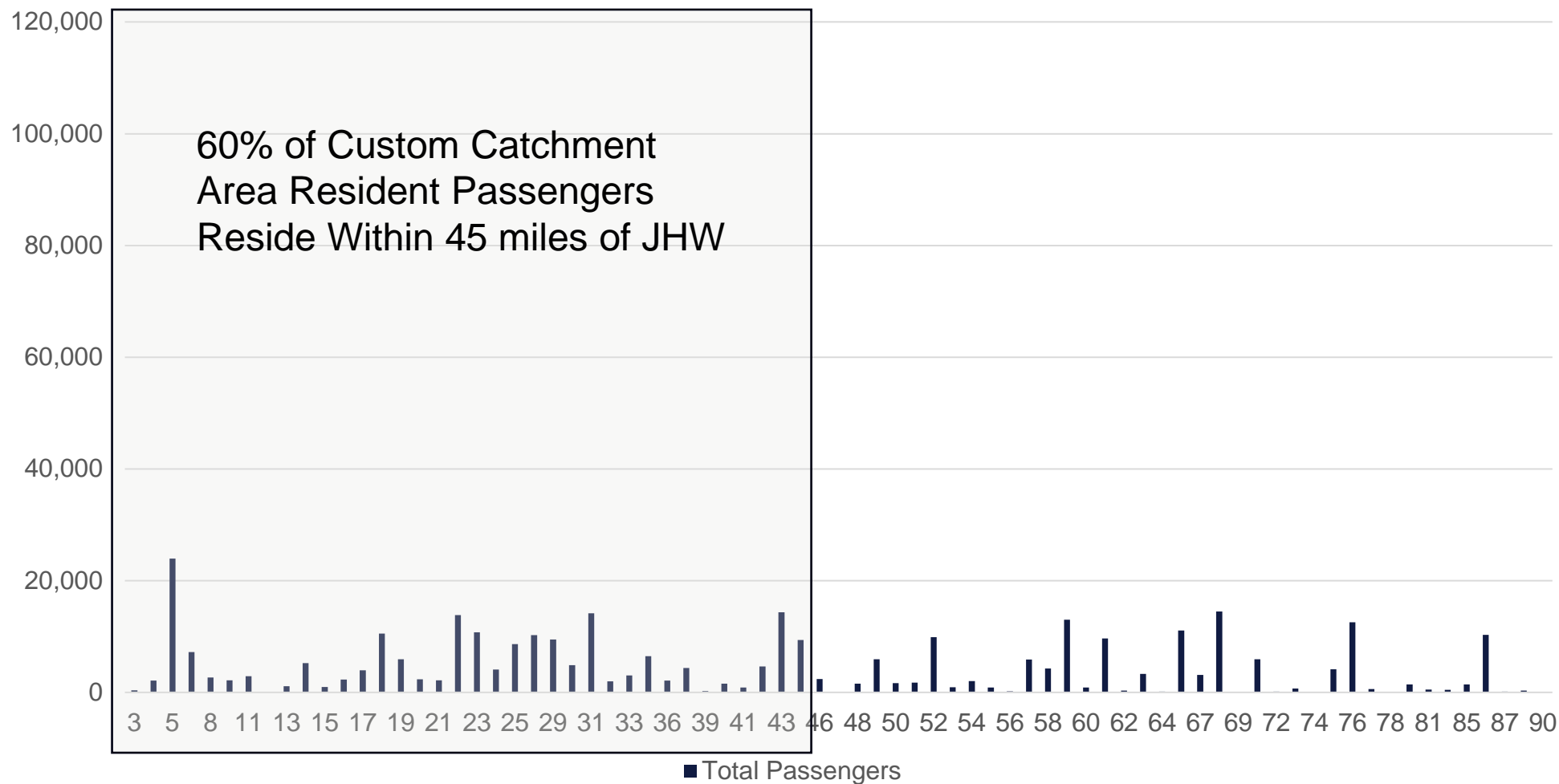
590 PDEW (39.2%)

Visitor Traffic in JHW Catchment
Custom Catchment Area

1506 PDEW

Combined Traffic in JHW Catchment
Custom Catchment Area

Resident Passengers by Distance from JHW – Custom Catchment Area

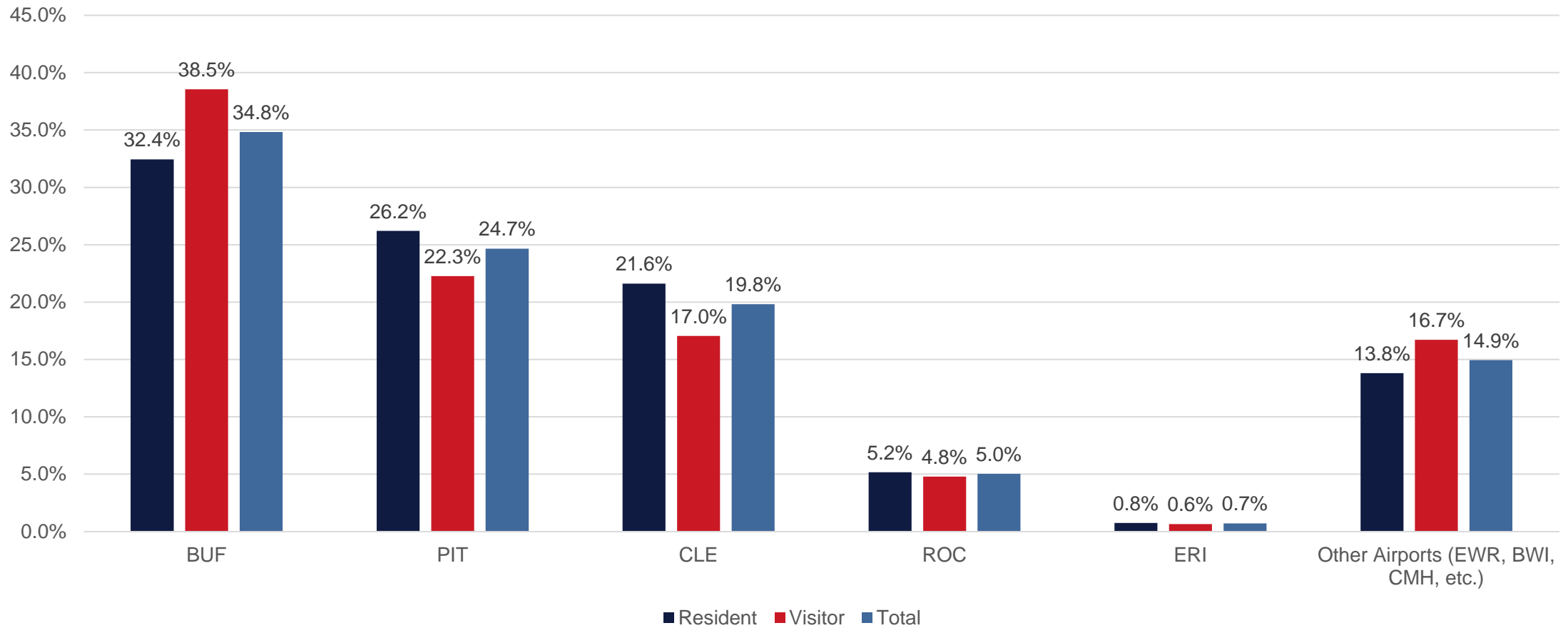


- Some of the largest resident traffic generating zip codes are located within a 60 mi band around JHW

Source: Airport Catchment Analytics (ACA), Airline Data Inc., ASM

Custom Catchment Area for JHW Airport Shares, (Residents, Visitors and Total)

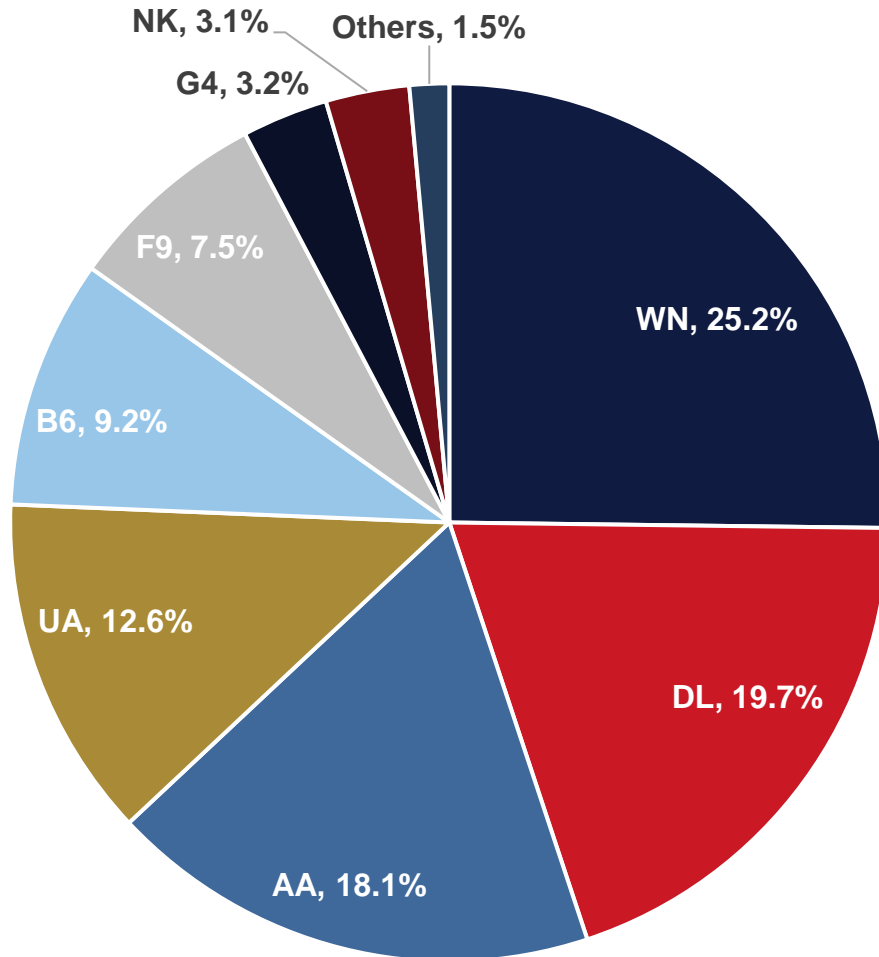
Competitor Airport Share of JHW Catchment Area Passengers (Resident, Visitor, and Total)



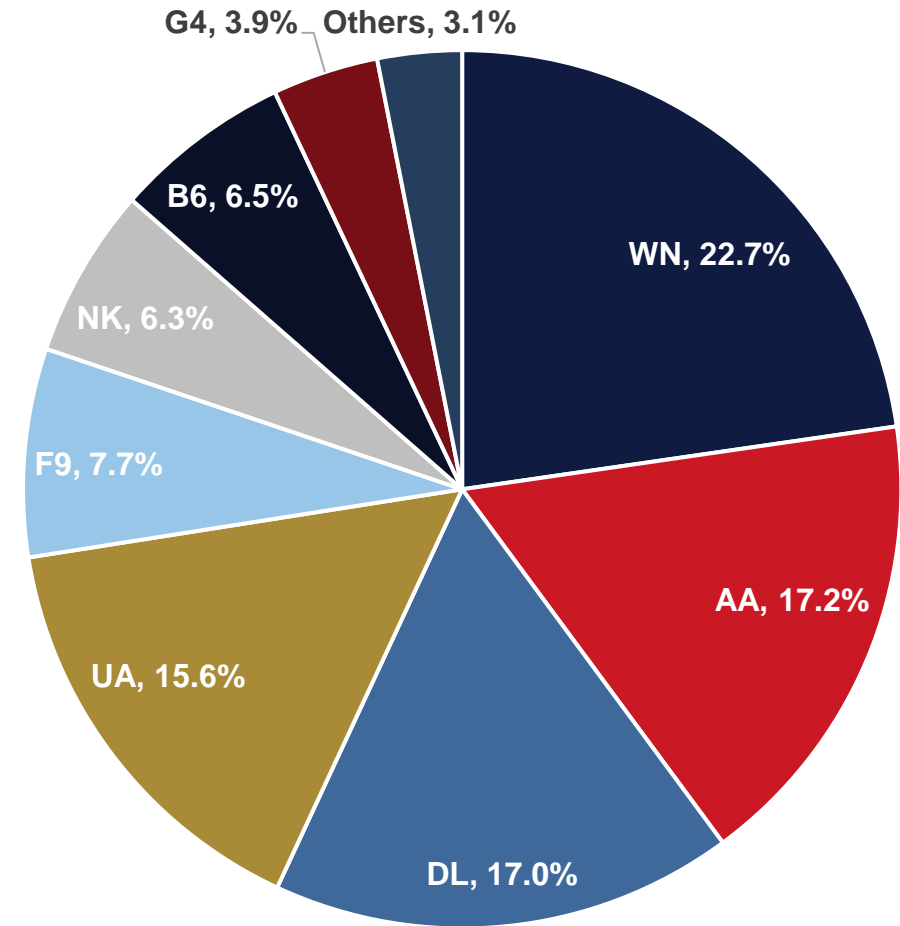
Source: Airport Catchment Analytics (ACA), Airline Data Inc., ASM

Proposed Catchment Area for JHW Airline Shares, 90 mi (Residents and Visitors)

JHW Non-Custom Catchment Area Carrier Share



JHW Custom Catchment Area Carrier Share



Source: Airport Catchment Analytics (ACA), Airline Data Inc., ASM

90-mile Radius

Custom Catchment Area

Proposed Catchment Area for JHW Top 20 Resident Markets, 90 mi (Ranked by Custom Catchment Area)

Rank	Destination Airport Code	JHW Catchment Area	JHW Catchment PDEW	Non-Catchment Area	Non-Catchment PDEW	Total 90 mi Pax	Total 90 mi PDEW	% of Total 90 mi
1	MCO	51,431.80	140.91	228,142.30	625.05	279,574.15	765.96	18.40%
2	FLL	28,314.90	77.58	117,027.60	320.62	145,342.50	398.2	19.50%
3	ATL	25,258.00	69.2	94,803.90	259.74	120,061.90	328.94	21.00%
4	TPA	24,013.60	65.79	107,036.30	293.25	131,049.92	359.04	18.30%
5	JFK	23,119.20	63.34	92,852.60	254.39	115,971.81	317.73	19.90%
6	LGA	21,504.30	58.92	100,128.10	274.32	121,632.33	333.24	17.70%
7	LAS	17,763.20	48.67	66,387.40	181.88	84,150.60	230.55	21.10%
8	DEN	16,682.50	45.71	60,876.50	166.79	77,559.04	212.49	21.50%
9	LAX	16,348.90	44.79	59,133.20	162.01	75,482.12	206.8	21.70%
10	PHX	13,292.90	36.42	50,008.60	137.01	63,301.52	173.43	21.00%
11	RSW	13,022.80	35.68	47,543.20	130.26	60,565.98	165.93	21.50%
12	EWR	12,645.00	34.64	67,392.40	184.64	80,037.36	219.28	15.80%
13	DFW	12,568.90	34.44	44,180.80	121.04	56,749.72	155.48	22.10%
14	CLT	11,651.60	31.92	55,116.50	151	66,768.12	182.93	17.50%
15	SFO	10,347.80	28.35	32,328.60	88.57	42,676.39	116.92	24.20%
16	ORD	9,956.60	27.28	53,181.40	145.7	63,138.08	172.98	15.80%
17	BOS	9,720.30	26.63	72,867.70	199.64	82,587.94	226.27	11.80%
18	IAH	9,504.70	26.04	28,878.70	79.12	38,383.40	105.16	24.80%
19	SEA	8,464.40	23.19	27,203.80	74.53	35,668.17	97.72	23.70%
20	BNA	7,093.20	19.43	32,017.30	87.72	39,110.47	107.15	18.10%
	Others	207,176.60	567.61	876,034.60	2,400.09	1,083,211.20	2,967.70	19.10%
	Total	549,881.10	1,506.52	2,313,141.60	6,337.37	2,863,022.70	7,843.90	19.20% ²⁰

Source: Airport Catchment Analytics (ACA), Airline Data Inc., ASM

Passenger Leakage Study– Key Takeaways

- Within a 90-mile radius of JHW 61% of passengers originate from the catchment area - 39% are visitors.
- The same ratio is true within the Custom Catchment Area (areas closer to JHW than competitor airports)
- There is sufficient demand to support regional jet air service providing we find the right airline partner at the right time to service the correct market.
- Southwest Airlines is the market share leader in the Custom Catchment Area carrying 23% of passengers
- The top 5 O&D passenger markets are Orlando, Fort Lauderdale, Atlanta, Tampa, and New York (JFK).
- Many larger traffic-generating zip codes are within 60 miles of JHW, and 60% (549 PDEW) of the Custom Catchment Area resident passengers are within 45 miles of JHW.
- The big 4 airlines (Southwest, American, United, and Delta) carry approximately 70% of resident passengers and 77% of visitors within the Custom Catchment Area

Passenger Leakage Study– Opportunity for JHW

- Large passenger base within the custom catchment area many of which reside within 45 miles of JHW
- Strong demand to top markets/regions:
 - NYC, Florida, Atlanta, and Chicago
 - Partner with a regional carrier to serve a proximate hub providing ample connectivity for residents and visitors
- Potential Solutions:
 - Leverage EAS or SCASD funding to subsidize and attract service
 - Evaluate a Minimum Revenue Guarantee (MRG) for air service sustainability during ramp-up period
- Reinstating commercial air service at JHW to a proximate hub can successfully capture significant passenger demand currently lost to regional competitors.
- Sustainable Air Service Solution = Right Airline + Right Market + Right Time + Right Seat Capacity (Aircraft)

Air Service Reinstatement Pathways



Air Service Reinstatement Pathways – 3 Key Approaches

Essential Air Service (EAS)

Federal program providing subsidies to support air service in underserved communities.

- FAA and DOT application submission with detailed service justification.
- Engage qualified airlines to submit proposals under EAS terms.
- Secure local community and political support (letters of endorsement).
- Continued dialogue with prospective airlines

Small Community Air Service Development Program (SCASD)

DOT-administered grant program to fund air service development projects.

- Identify clear service targets (markets, airlines).
- Develop a strong proposal with leakage data, economic justification, and community funding match.
- Collaborate with airline partners and consultants for proposal submission.
- Continued dialogue with prospective airlines

Minimum Revenue Guarantee (MRG)

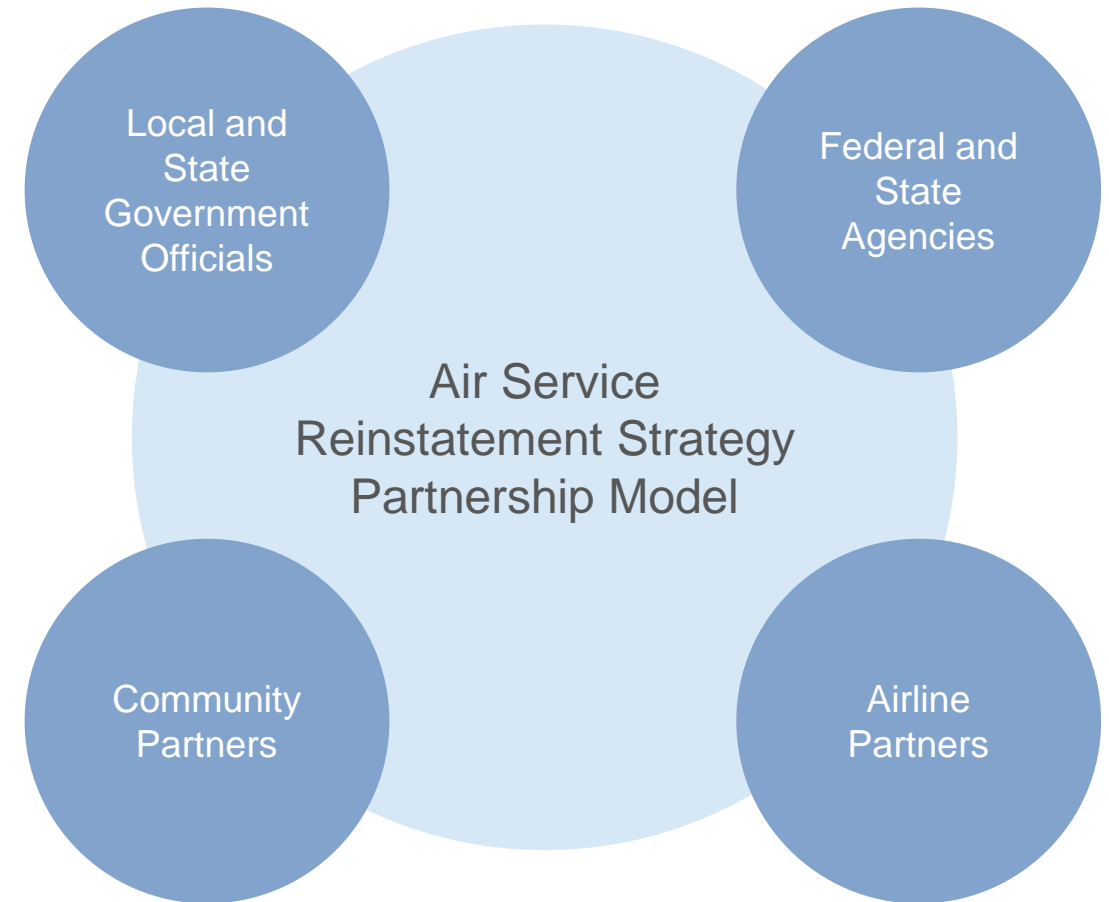
Financial backstop to ensure airline profitability during initial operations.

- Establish MRG fund through community partnerships, state/local contributions, or private investment.
- Negotiate MRG terms with prospective airline partners.
- Align fund duration with airline ramp-up period.
- Continued dialogue with prospective airlines

All approaches require significant support from key regional stakeholders and partners to execute effectively.

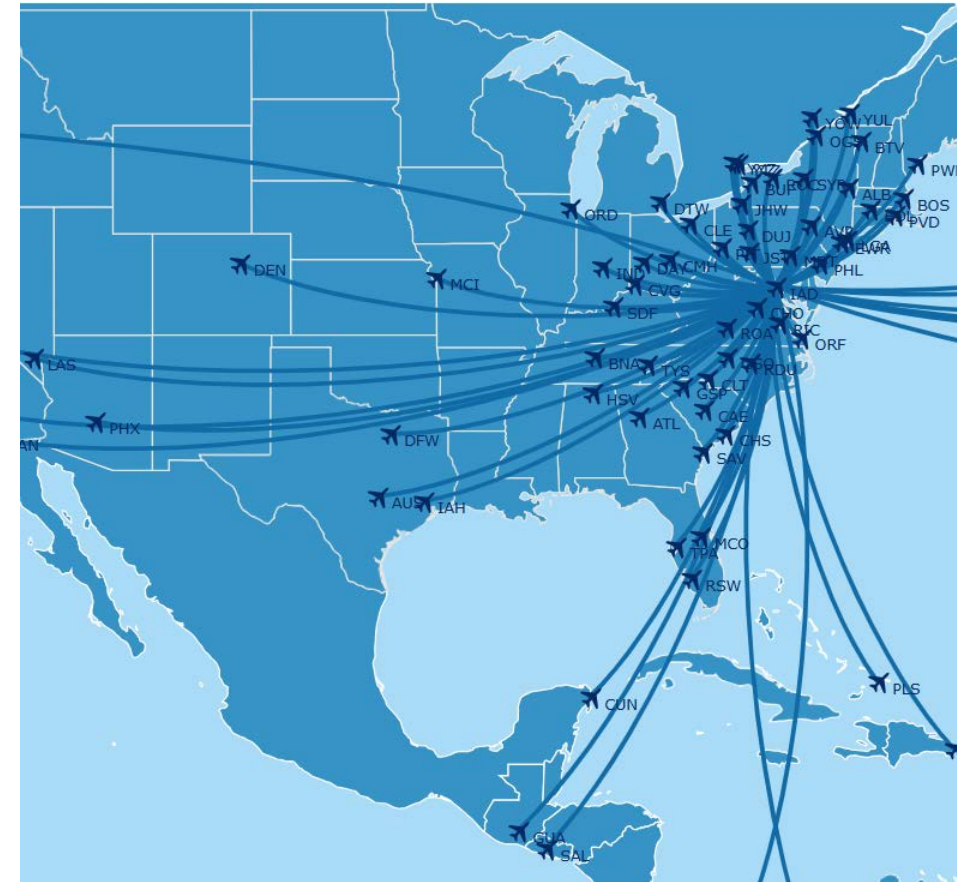
Air Service Reinstatement Pathways – Potential Key Stakeholders and Partners

- Local and State Government Support:
 - Chautauqua County and city representatives.
- Federal and State Agencies:
 - FAA
 - DOT
 - NY State Transportation Authority
- Community Partners:
 - Chamber(s) of Commerce
 - Regional Tourism Boards
 - Business and Community Leaders
- Airline Partners
 - Preliminary Interest from Airlines



Air Service Reinstatement Pathways – Airline Recommendations and Approaches

- **Short-Term:**
 - Essential Air Service (EAS) program service for hub connectivity, maximize passenger options and established funding
 - Explore SCASD or MRG as alternative solutions
 - Example airlines: Boutique Air, Southern Airways Express, Cape Air
- **Medium-Term:**
 - Partner with a major regional carrier (e.g., American or United) to provide consistent hub connections.
- **Long-Term:**
 - Evaluate options to attract an ultra-low-cost carrier (e.g., Allegiant or Avelo) to serve high-volume leisure markets – considering runway limitations



Airline Opportunities



Airline Opportunities – Targeted Markets and Airline Alignment

- According to the latest EAS reports from US DOT the following airlines support the majority of EAS service:

Rank	Airline	EAS Communities Served	Sum of Mar. 1, 2024	Share of Markets	Share of Revenues
1	SkyWest	34	\$ 175,303,096	30.6%	35.5%
2	Southern	19	\$ 54,152,618	17.1%	11.0%
3	AEAS/Contour**	13	\$ 54,821,891	11.7%	11.1%
4	Cape Air	13	\$ 41,714,042	11.7%	8.5%
5	Key Lime Air	10	\$ 55,741,827	9.0%	11.3%
6	Contour	9	\$ 50,693,249	8.1%	10.3%
7	American	4	\$ 17,506,191	3.6%	3.5%
8	Boutique Air	3	\$ 12,764,639	2.7%	2.6%
9	United	3	\$ 15,304,158	2.7%	3.1%
10	Advanced Air	2	\$ 8,742,979	1.8%	1.8%
11	Sun Country	1	\$ 6,460,988	0.9%	1.3%
		111	\$ 493,205,678		

Continue to engage with potential airline partners to determine interest in serving JHW under all 3 approaches.

Next Steps and Action Plan



Next Steps and Action Plan

Phases	Activities	Timeline	Owner
1. Stakeholder Buy-In	Community Meetings and Presentations to Garner Support	1-2 months	Passero (ASM) and JHW
2a. Funding Discussions	Work with FAA and DOT along with interested airlines	3-4 months	Passero (ASM) and JHW
2b. Airline Negotiations	Finalize support and agreements with interested airlines	3-4 months	Passero (ASM) and JHW, Community Partners
3. Service Reinstatement	Marketing and airline operations support	4-6 months	Passero (ASM) and JHW, Community Partners, Airline Leadership

Key Takeaways:

- EAS provides the most immediate path to reinstating air service, yet will need significant support.
- SCASD funding can support marketing, incentives, and route development – an annual process.
- MRG ensures long-term financial viability for airlines – requires significant investment.
- Collaboration with airlines and stakeholders is critical for success regardless of the approach.
- Legislative support is paramount to achieve intended goal of reinstating commercial air service.

Thank You!

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