



FY15 MID-YEAR REPORT WINTER RECAP & SUMMER UPDATE

May 2015

Presented To

SUN VALLEY
AIR SERVICE BOARD





FY15 GOALS & PERFORMANCE METRICS

- **Retain/Expand Current Air Service**
 - Retain contracted nonstop SEA, LAX, SFO, DEN flights
 - Optimize all air service schedules and frequency as feasible
 - Improve diversion bussing passenger experience in winter
- **Increase Load Factors & Enplanements**
- **Reduce Air Service Contract Costs**
 - Work with airlines & marketing partners to increase load factors & minimize air service contract costs. Reduce local market leakage
 - Work with airlines to make SUN fares as competitive as possible.
- **New Air Service**
 - Pursue new nonstop flight market for FY16
- **Research**
 - Conduct 1000+ air passenger surveys at SUN
 - Continue with competitive and economic impact analysis and studies



FY15 MID-YEAR UPDATE

FSVA Air Service Development Efforts

- **Airline Meetings/Strategic Development**

- Negotiated and secured optimized winter & summer air service contracts w/United and Alaska
- Continued discussions, analysis on performance, fares, etc. with airlines
- Continued pursuit of strategic opportunities for enhanced/new future service
- Initiated improvements to diversion bussing for winter
- Weekly monitoring/tracking of bookings, competitive developments

- **Local Air Marketing/Community Outreach**

- Promotion in local and regional (southern ID) markets.
Encourage use of SUN as air gateway
- Keep community, stakeholders, consumers, media updated with information via Enews, website, social media, press releases, presentations, etc.
- Gather input from business on air service needs

- **Research**

- Air Passenger survey for winter 2015 season completed
- Other ongoing research studies, analysis, etc.

Alaska
Fly from Sun Valley!

Seattle from
\$89! ONE WAY

Los Angeles
from
\$115! ONE WAY

HURRY!
Book by May 4, 2015

Alaska Airlines offers
nonstop flights to SUN
from Seattle (SEA) and
Los Angeles (LAX),
beginning June 12.



FY15 YTD RESULTS & SUCCESS

Secured Expanded Contracted Service for Winter/Summer

- ❖ Maintained contract nonstop SEA, LAX, SFO winter & summer flights
- ❖ Added new United DEN-SUN winter 2014/15 service
- ❖ Made schedule adjustments to maximize service utilization, reduce costs

Improved Diversion Busing Operations & Customer Experience

- ❖ Newer motor coaches – standby busses & drivers
- ❖ Airport hosts in TWF/SUN - improved communication with passengers

❖ **MORE COMPETITIVE** average business and leisure airfares to SUN

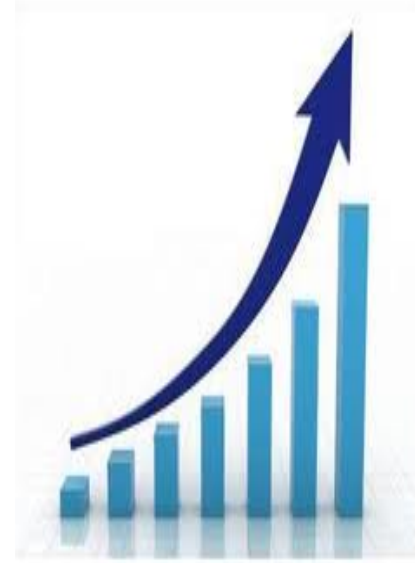
Fly SUN. ✈️
Non-stop to DEN, LAX, SEA, SFO, SLC
ONE-STOP TO THE WORLD



FY15 YTD RESULTS & SUCCESS

2014/15 WINTER SEASON (Dec- April)

- 41,153 seats available - up 7%
- 29,995 enplanements - up 11%
- Average Load Factor: 73% - up 3 pts



Notes:

- Passengers/flights diverted to TWF and BOI not included in these stats
- Diverted and cancelled flights decreased this winter.

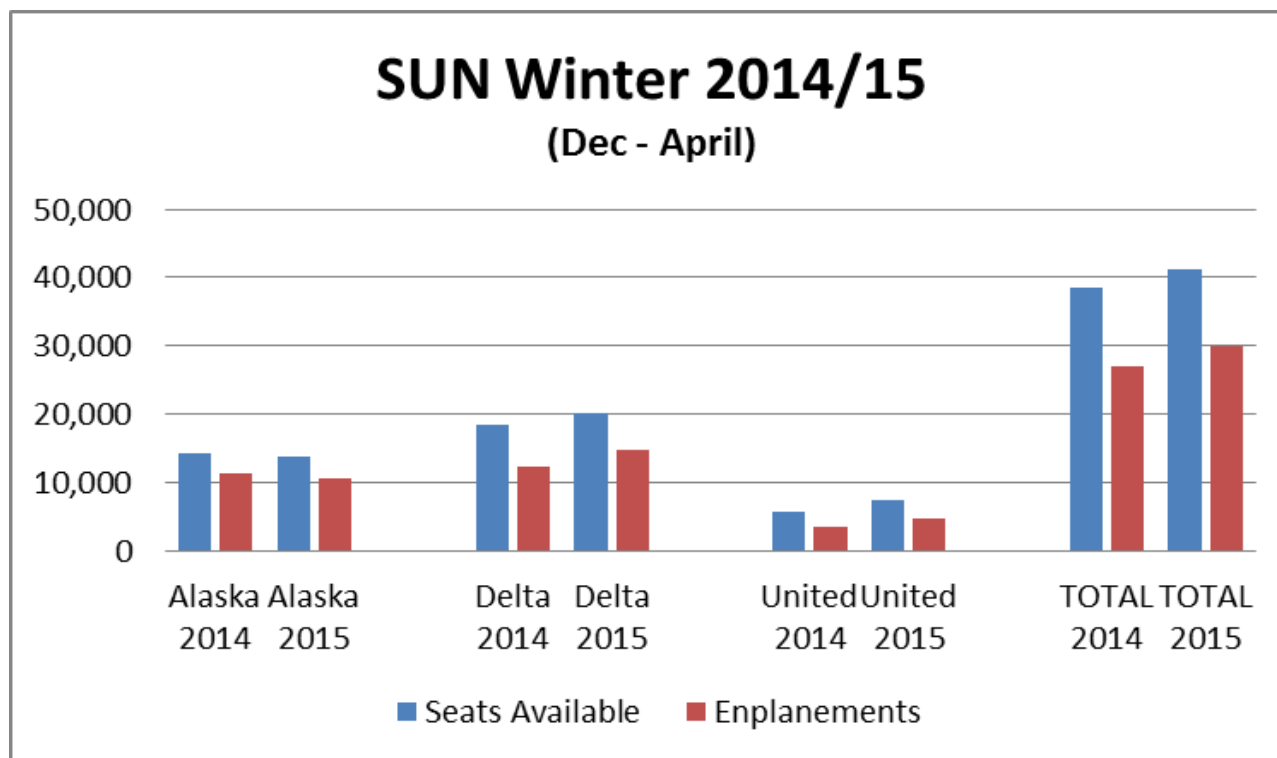
Average annual flight load factor at competing Rocky Mtn destinations: 65-75%



FY15 YTD RESULTS & SUCCESS

SUN Winter Stats – Continued Growth

Notes: Statistics do not include flights, passengers diverted to TWF or BOI in winter

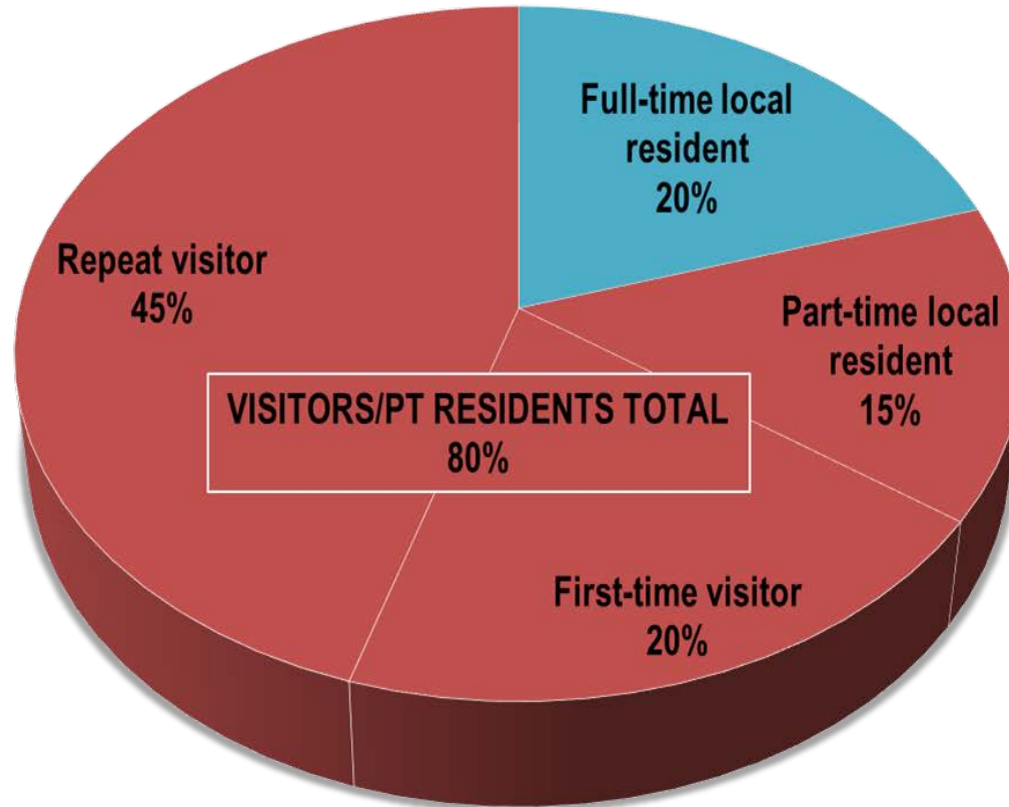


TOTAL WINTER DEC-APRIL	Alaska 2014	Alaska 2015		Delta 2014	Delta 2015		United 2014	United 2015		TOTAL 2014	TOTAL 2015	% Change
Seats Available	14,364	13,680	-5%	18,417	20,081	9%	5,676	7,392	30%	38,457	41,153	7%
Enplanements	11,258	10,604	-6%	12,298	14,641	19%	3,487	4,750	36%	27,043	29,995	11%
LF % Avg	78%	78%	0pts	67%	73%	7pts	61%	64%	3pts	70%	73%	3pts



FY15 WINTER RESULTS & SUCCESS

AIR PASSENGER MIX (Winter 2014.15)



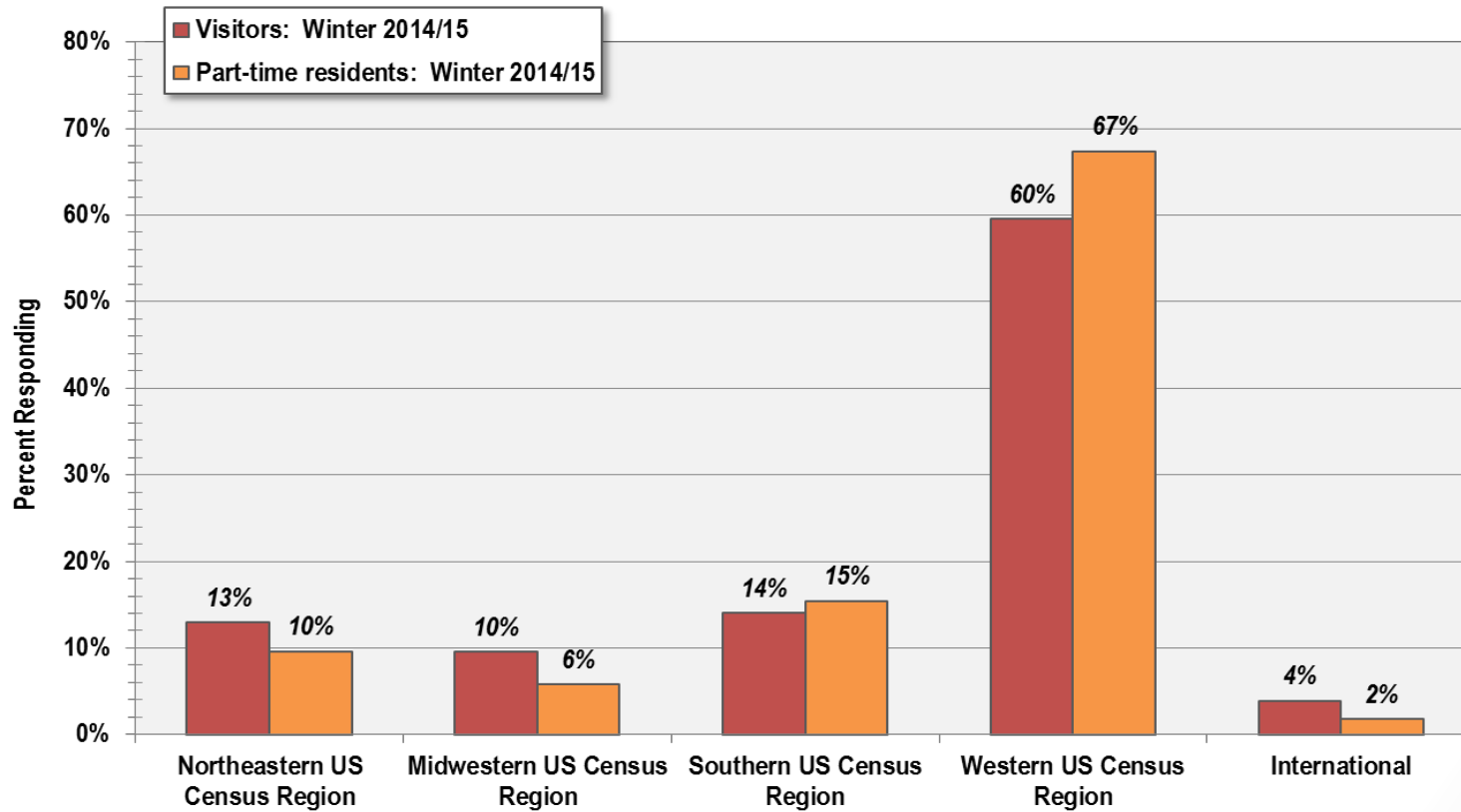
80% SUN Air Passengers were Visitors or PR residents/2nd Homeowners

- *Estimated from SUN Air Passenger surveys



FY15 WINTER RESULTS & SUCCESS

ALL VISITOR AIR PASSENGERS ORIGIN BY REGION



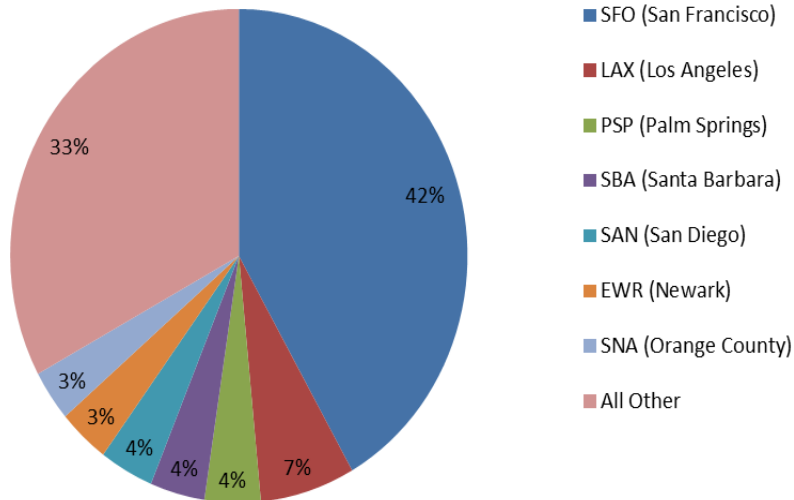


FY15 WINTER RESULTS & SUCCESS

VISITOR PASSENGER ORIGIN ON NEW FLIGHTS

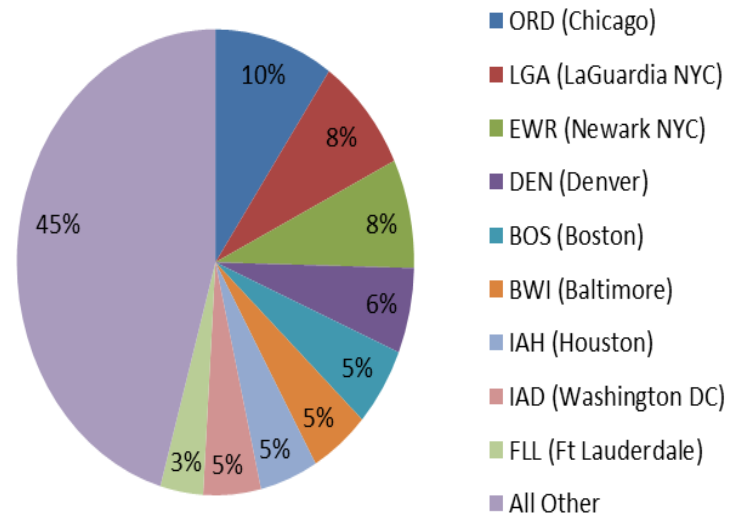
Visitor Passenger Origin SFO Flights

SUN SFO Visitor Passenger Origin
Top Markets - Winter 2014.15



Visitor Passenger Origin DEN Flights

SUN-DEN Visitor Passenger Origin
Top Markets - Winter 2014.15





FY15 YTD RESULTS & SUCCESS

ECONOMIC IMPACTS

OTHER ECONOMIC IMPACTS OF IMPROVED AIR SERVICE

- Estimated \$150M + in new infrastructure investments and new jobs

Investment in new & renovated upscale hotel projects

- **Limelight Hotel - \$ 54M Construction Investment**
205 jobs during construction*; 57 jobs when open*
Opening fall of 2017
- **Auberge Resort: Sun Valley - \$55M Construction Investment**
100+ jobs during construction; 80+ jobs when open
Opening fall of 2017
- **Sun Valley Lodge renovation – reopening June 15, 2015**



Investment in SUN airport improvements

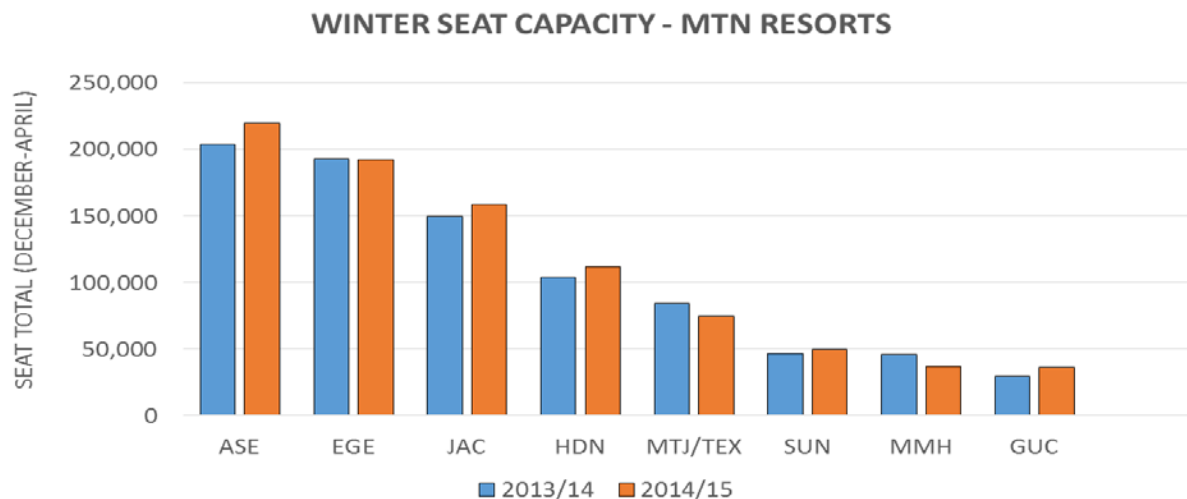
- \$34 million 30 jobs during construction



THE COMPETITION

We are successfully expanding our air service but so is our competition. This past winter.....

- **Sun Valley:** added Denver winter - 5 nonstop cities
- **Jackson Hole:** added Washington DC – 13 nonstop cities
- **Steamboat:** added Washington DC, San Francisco – 11 nonstop cities
- **Vail:** added Salt Lake City – 11 nonstop cities
- **Telluride/Montrose:** added San Francisco, Phoenix – 10 nonstop cities
- **Mammoth:** added Denver, Las Vegas – 6 nonstop cities





SUMMER FY15 UPDATE

- SUN Airport re-opened in May with terminal addition/airfield redesign
Big investment which will have safety and economic dividends for years
- FSVA negotiating with contract airlines for FY16 winter/summer service
- SUN Air Passenger Surveys for summer/fall will begin in mid-June
- Local marketing of SUN air service continuing
- Advance flight bookings running ahead of last summer – good sign

SUMMER/FALL 2015 SUN VALLEY (SUN) NON-STOP FLIGHT SCHEDULE

AIRLINE	CITY	AIRPORT	PLANE	DEPARTS CITY	ARRIVES SUN	DEPARTS SUN	ARRIVES CITY	FREQUENCY	DATES
 www.alaskaair.com	Los Angeles	LAX	Q400	1:35pm	5:00pm	11:20am	12:55pm	Daily	June 12-Sept 7
				1:35pm	5:00pm	11:20am	12:55pm	Th/Fri/Sun	Sept 10-20
	Seattle	SEA	Q400	8:10am	10:50am	5:35pm	6:23pm	Daily	June 12-Sept 21
				11:50am	2:30pm	3:00pm	4:00pm	Th/Fri/Sun	Sept 24-Oct 18
 www.delta.com	Salt Lake City	SLC	CRJ700	11:15am	12:25pm	6:50am	7:53am	Daily	Year-round
				9:50pm	10:49pm	1:00pm	2:00pm	Daily	Year-round
				4:10pm	5:19pm	5:55pm	6:57pm	Sat/Sun only	June 13-Aug 30 (except 7/4)
 www.united.com	Denver	DEN	CRJ700	6:45pm	8:35pm	7:15am	9:00am	Daily	June 26-Aug 22
								5x week	Aug 23-Sept 7
								(no Tues/Wed to SUN; no Wed/Thurs from SUN)	
	San Francisco	SFO	CRJ700	4:00pm	6:50pm	8:10am	9:25am	Daily	June 26-Aug 22
								5x week	Aug 23-Sept 7
								(no Tues/Wed to SUN; no Wed/Thurs from SUN)	

Flight times and dates are approximate and subject to change.
Airline and independent booking resources should be checked for accurate flight schedules and times.





FSVA AIR SERVICE PARTNERS

FLY SUN VALLEY ALLIANCE SUN VALLEY AIR SERVICE KEY PARTNERS

SUN VALLEY
AIR SERVICE BOARD
.....



SUN VALLEY
ECONOMIC
DEVELOPMENT

Plus.....

The Wood River Valley Community

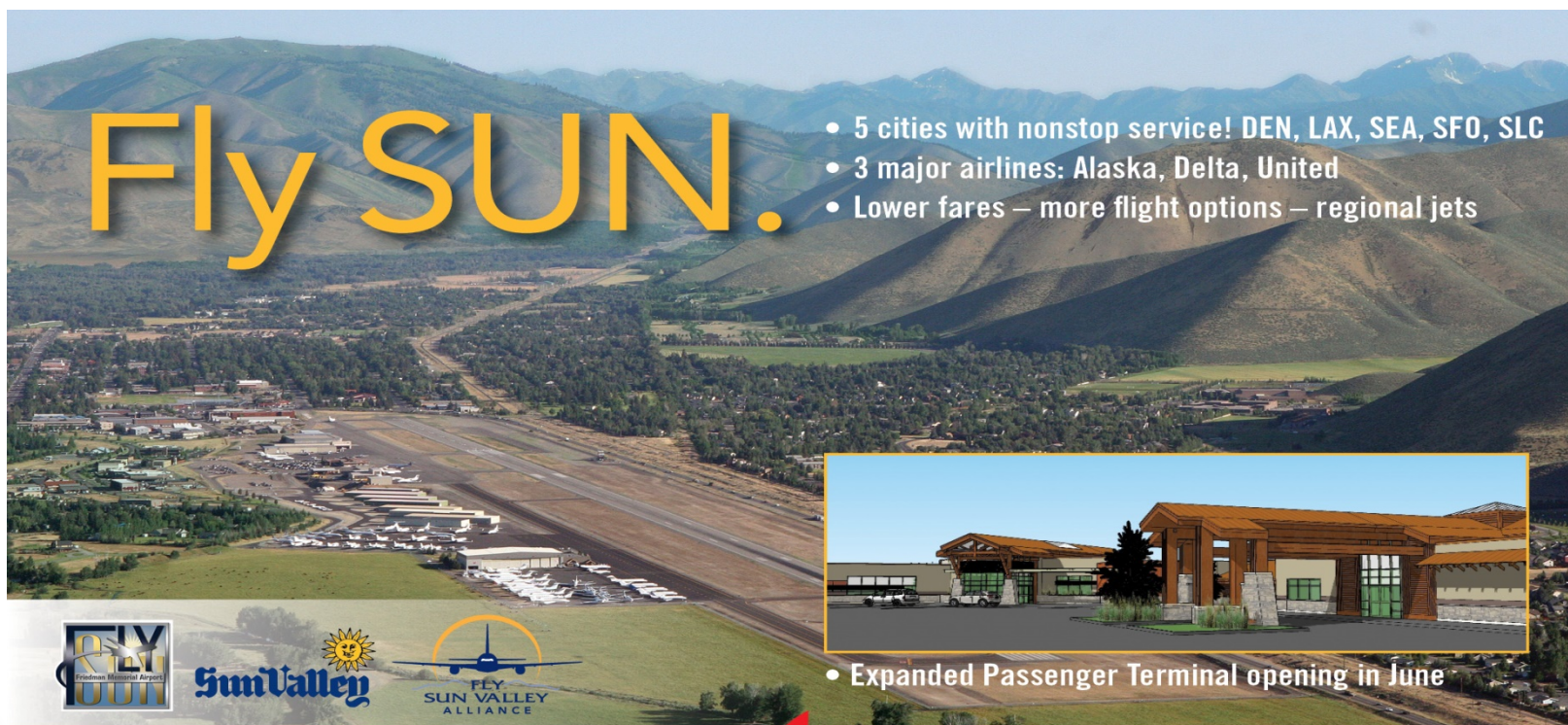
Over 50 Local Businesses



AIR SERVICE = BUSINESS

We are making great progress - more to come.

THANK YOU



- 5 cities with nonstop service! DEN, LAX, SEA, SFO, SLC
- 3 major airlines: Alaska, Delta, United
- Lower fares – more flight options – regional jets

- Expanded Passenger Terminal opening in June



Sign up for email alerts on Flight Deals & News:

www.flysunvalleyalliance.com

www.iflysun.com

Check SUN Fares First –
Book Early & Save!

Fly SUN. ✈️

Non-stop to DEN, LAX, SEA, SFO, SLC
ONE-STOP TO THE WORLD