



# SUN AIR SERVICE & ECONOMIC IMPACT UPDATE

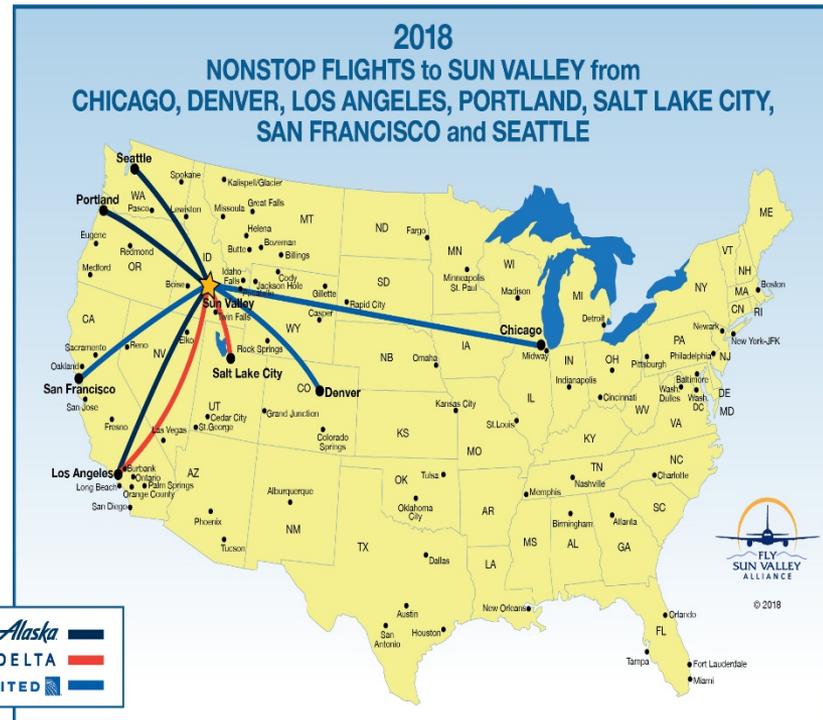
February 2018



# CONTINUED SUCCESS

## Investment in Air Service Continues to Deliver Results

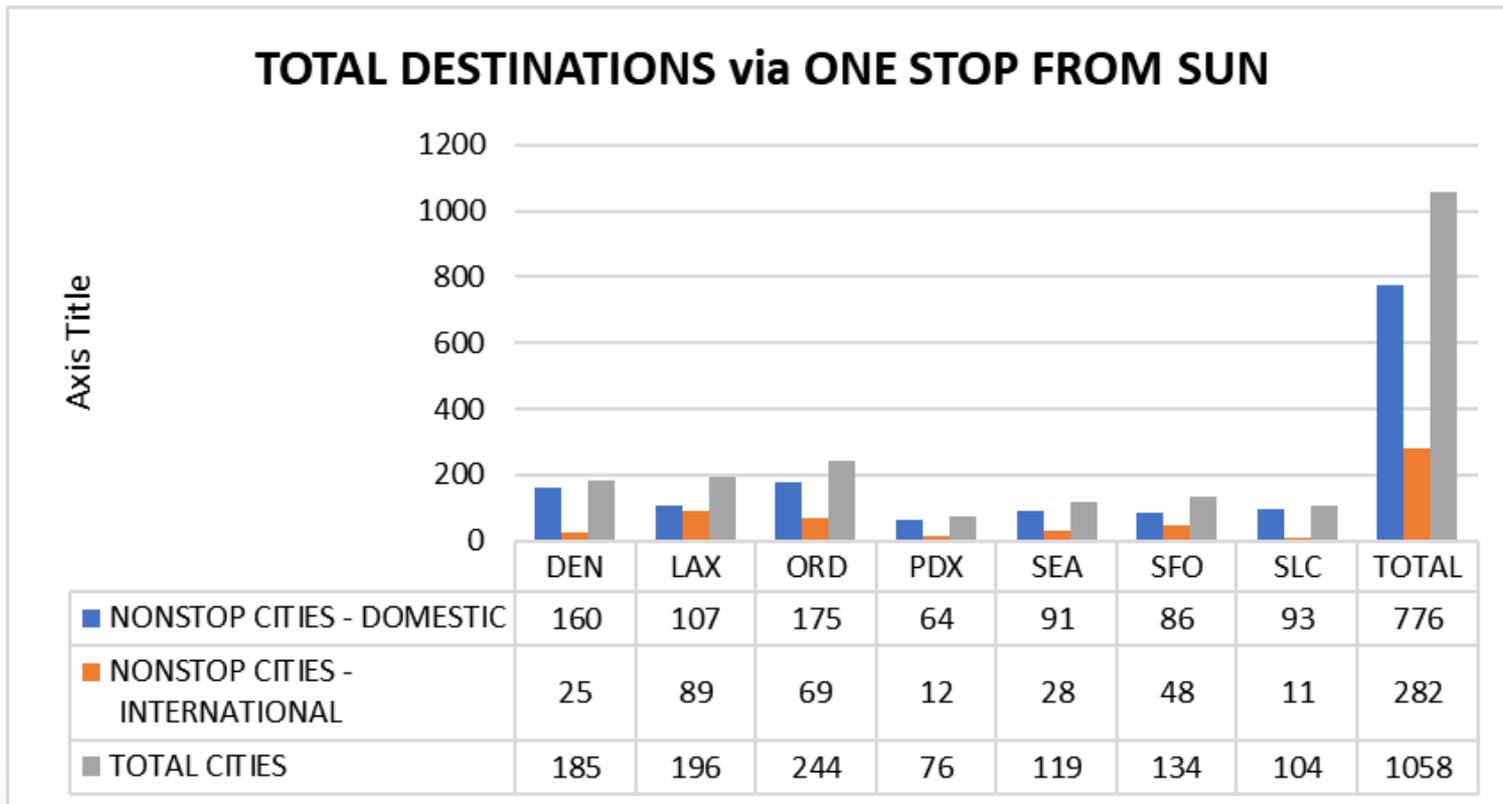
*“We’ve come a long way, baby”*





**Fly SUN. ✈️**  
**Nonstop to DEN, LAX, ORD, PDX, SEA, SFO, SLC.**  
**ONE STOP TO THE WORLD.**

- SUN travelers can access 374 unique destinations via one stop (259 domestic- 115 international)





# RESULTS & SUCCESS (2014 - 2017)

## NONSTOP FLIGHTS TO 7 CITIES!

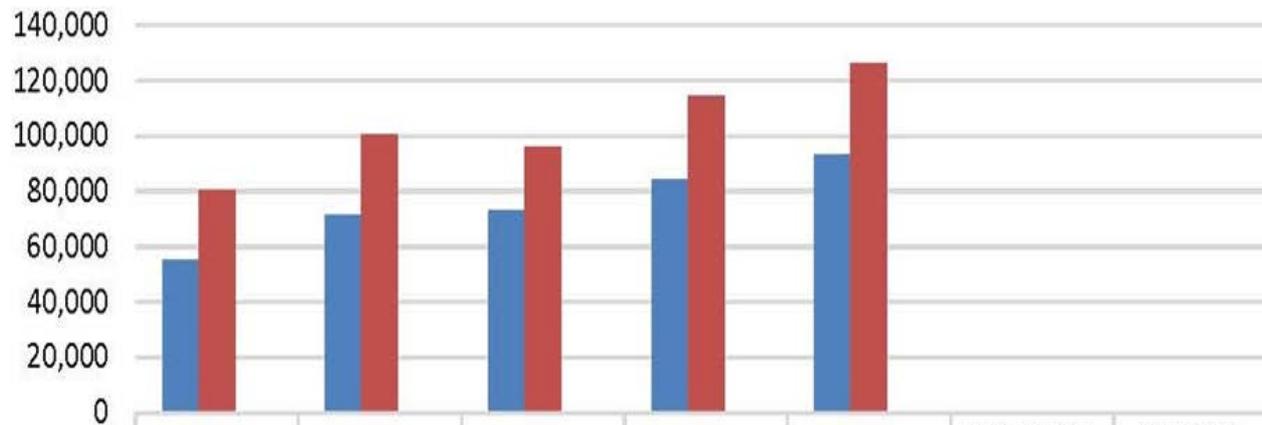


- ✓ 4 NEW FLIGHTS - ORD, DEN, PDX, SFO (+LAX, SEA, SLC)
- ✓ NEW AIRLINE (United); NEW AIRCRAFT (CRJ700, E175)
- ✓ 56% more SEATS, 68% more ENPLANEMENTS (2013-17), longer seasons
- ✓ 58,000 new air-travel visitors; spending \$81M
- ✓ \$477M total in direct spending by visitors and part-time residents
- ✓ \$200M economic impact from new tourism developments/enhancements (hotels, airport, etc.)
- ✓ Improved airline reliability (re: Horizon RNP landing approach system)



# RESULTS & SUCCESS (2013-17)

## SUN Air Service Growth 2013 - 2017\*

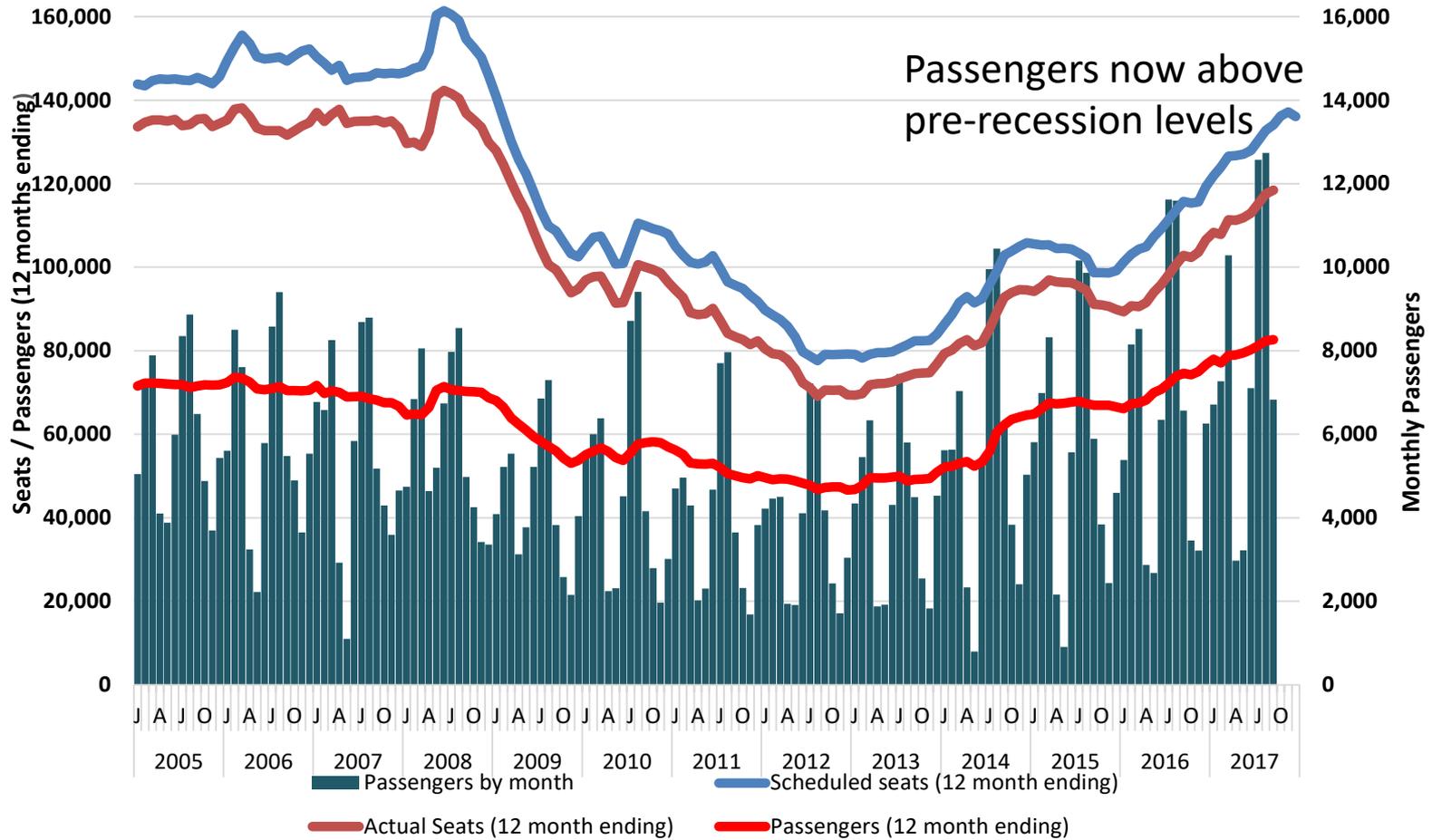


	2013	2014	2015	2016	2017	2016-2017 Increase	2013-17 Increase
■ ENPLANEMENTS	55,313	71,543	73,420	84,560	93,068	10%	68%
■ SEATS	80,663	100,777	96,309	114,370	126,203	10%	56%
■ LOAD FACTOR%	69%	71%	76%	74%	74%		

\*SUN Airport Stats +5% estimated for diverted flights/passengers. New service: SFO Dec 2013; DEN June 2014; PDX Dec 2016; ORD Dec 2017



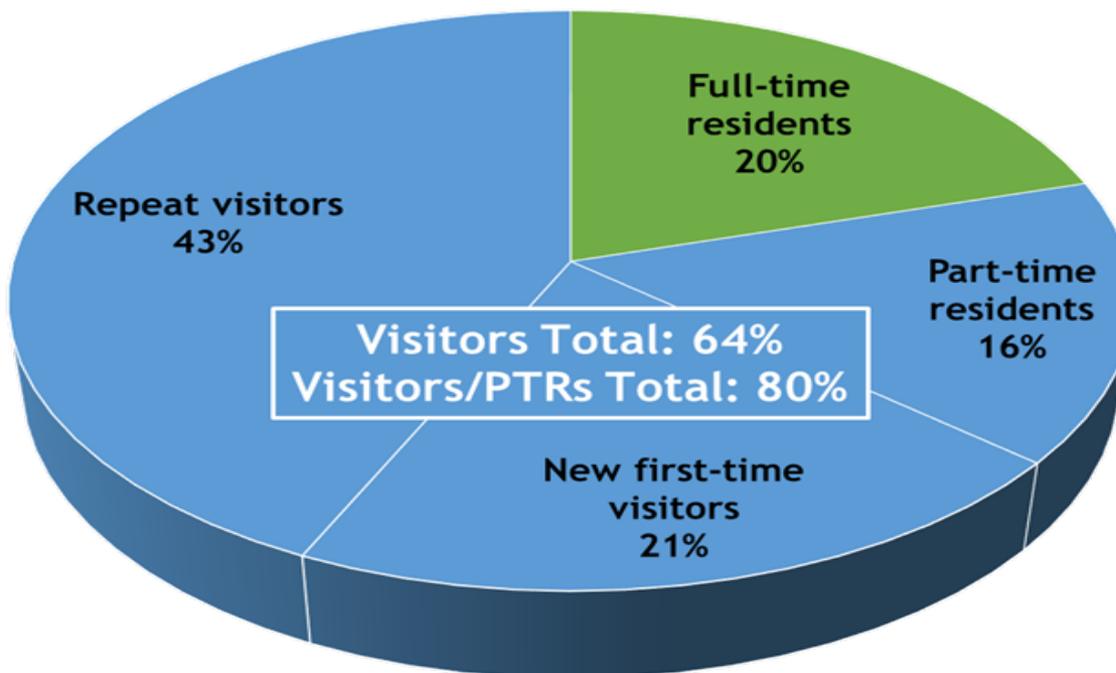
# SUN AIR SERVICE OVER TIME





# SUN AIR TRAVELERS – WHO ARE THEY?

**Resident/Visitor Mix of SUN Passengers**  
2016 & 2017 Combined Annual Results



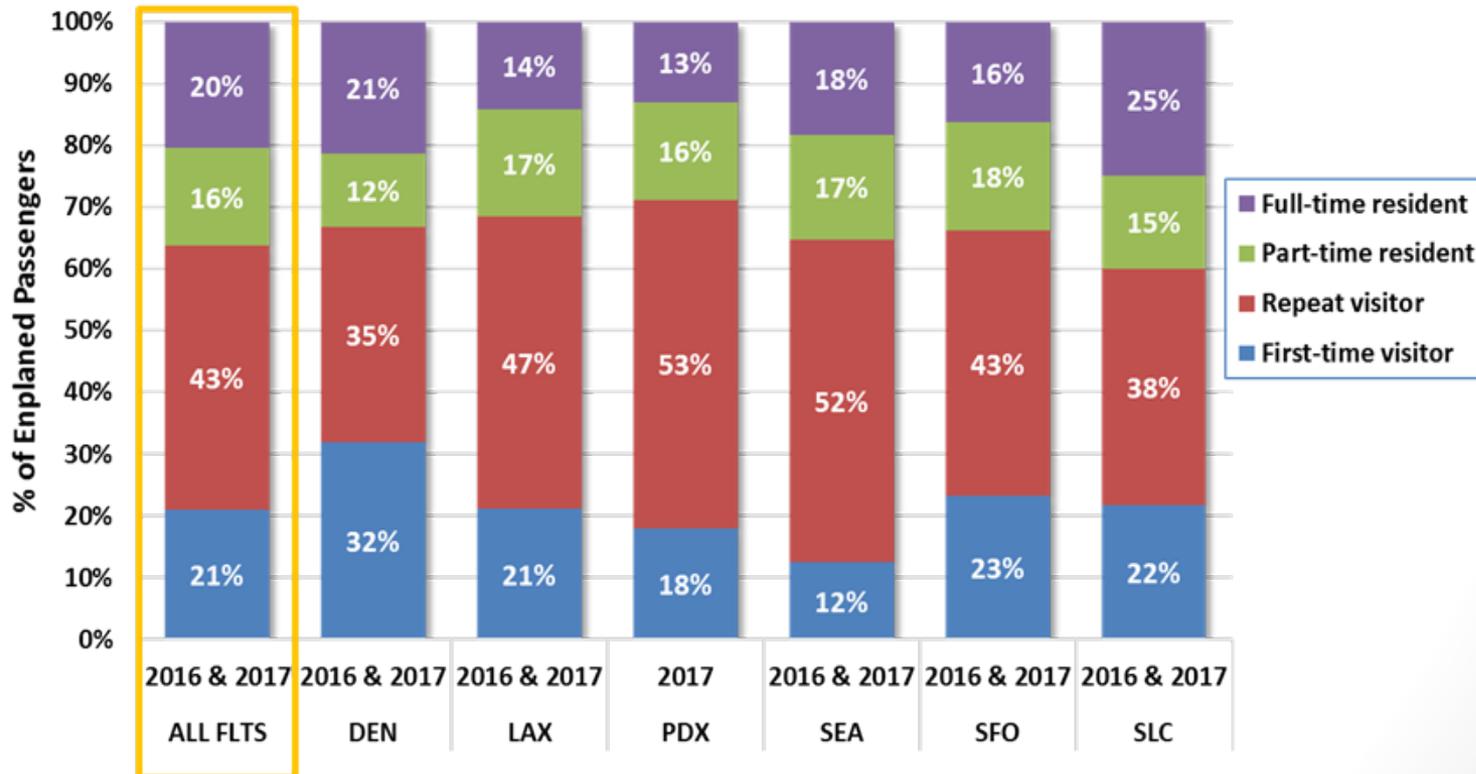
Source: FSVA SUN Air Passenger Survey, RRC Associates



# SUN AIR TRAVELERS – WHO ARE THEY?

- The vast majority of passengers on all SUN flights are short-term visitors (new and repeat).

SUN Passenger Mix by Flight: 2016 & 2017 Combined



Source: FSVA SUN Air Passenger Survey, RRC Associates. Results based 2016/2017 two-year survey data.



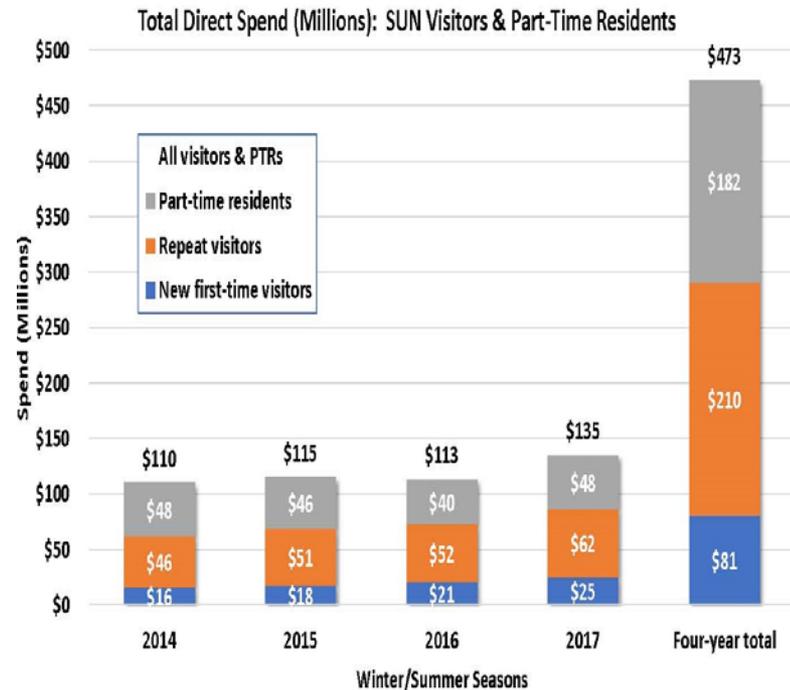
# SUN AIR TRAVEL VISITORS - ECONOMIC IMPACT

## 58,000 New Visitors



Source: FSVA SUN Air Passenger Survey, RRC Associates

## \$81M spent by New Visitors



Source: FSVA SUN Air Passenger Survey, RRC Associates

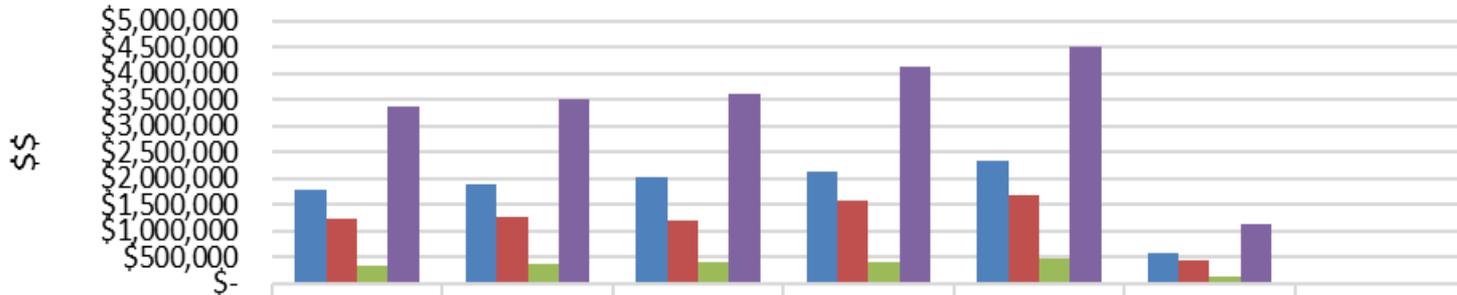


# ECONOMIC IMPACT - LOT

- Dramatic growth in SUN air seats and enplanements over past 4 years at SUN, tracks with strong growth in general Local Option Tax revenues.
- Investment in air service & marketing has significant community ROI in many ways

## General LOT Revenues 2013-17

(not including 1% for Air)

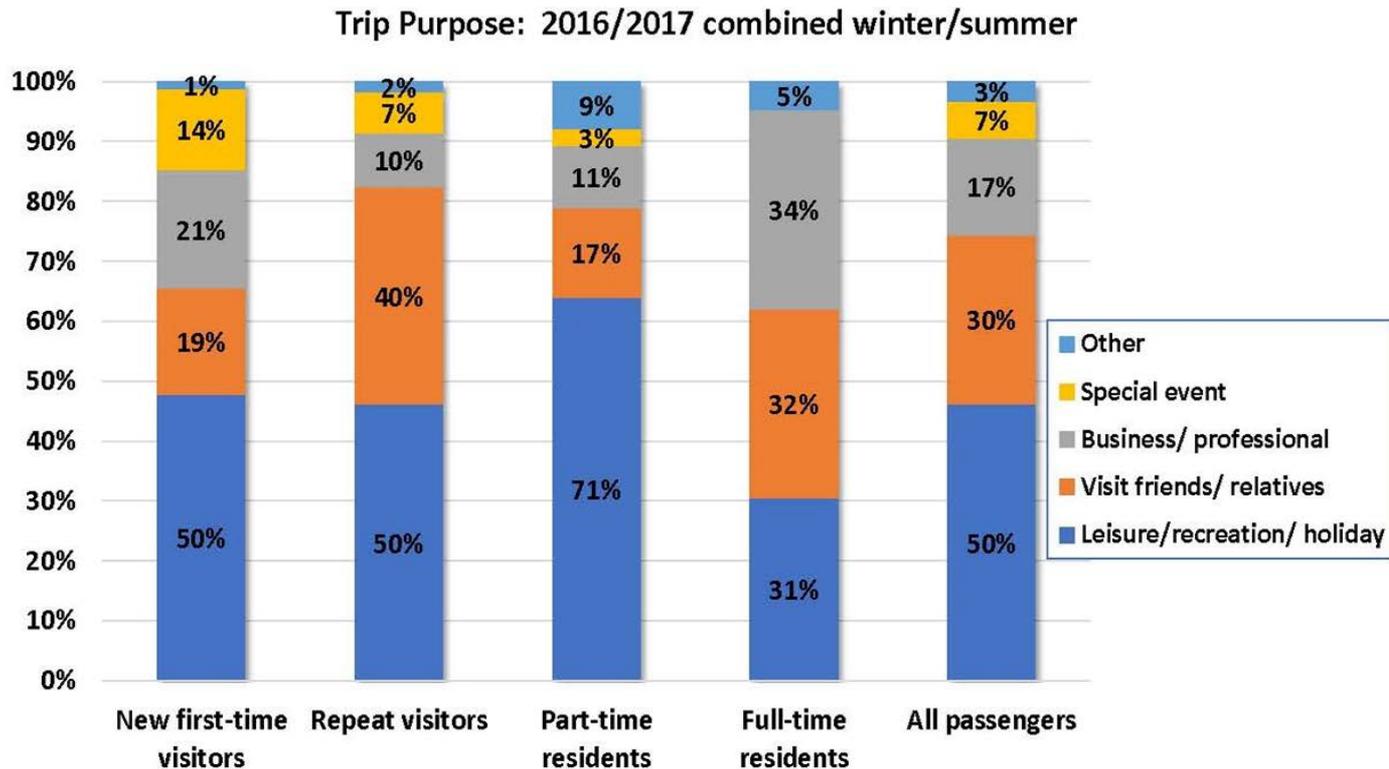


	FY13	FY14	FY15	FY16	FY 17	\$ Increase FY14-17	TOTAL % increase FY14-17
■ Ketchum	\$1,774,378	\$1,891,103	\$2,019,867	\$2,141,419	\$2,338,874	\$564,496	32%
■ Sun Valley	\$1,248,522	\$1,257,699	\$1,196,547	\$1,572,788	\$1,682,102	\$433,580	35%
■ Hailey	\$348,850	\$367,757	\$403,174	\$411,368	\$489,139	\$140,288	40%
■ TOTAL	\$3,371,750	\$3,516,559	\$3,619,588	\$4,125,575	\$4,510,114	\$1,138,364	34%



# SUN AIR TRAVELERS – TRIP PURPOSE

- 83% of visitors are coming to Sun Valley for leisure/visit FF/events
- 63% of locals are traveling out for leisure/visit FF, 34% on business



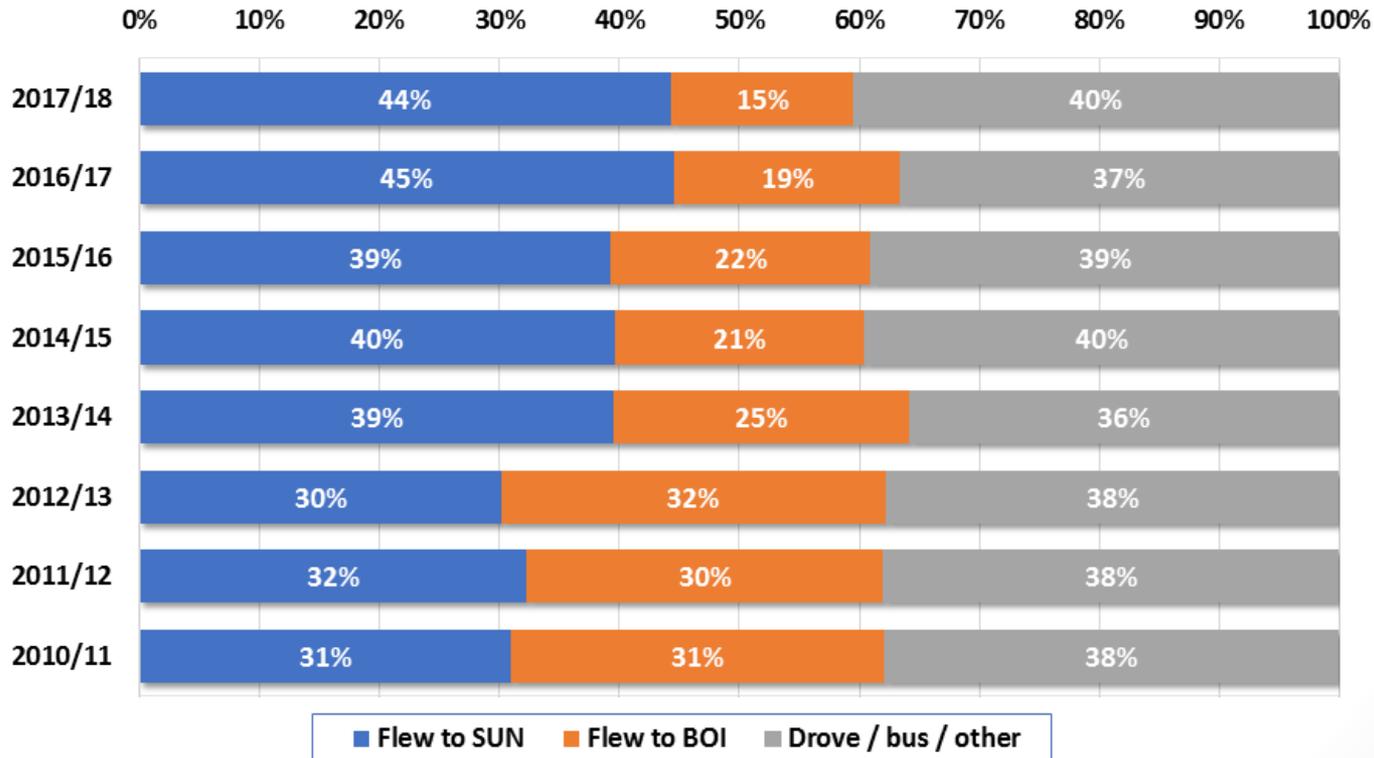
Source: FSVA SUN Air Passenger Survey, RRC Associates. Numbers shown in graph sum to greater than 100% due to multiple responses.



# LEAKAGE OVERVIEW

- More flight options at SUN = less passenger leakage to BOI

Mode of Travel to SV: Sun Valley Resort Skiers (overnight visitors only)  
2010/11 - 2017/18





# SKI RESORT AIR SERVICE COMPARISON

- The competition remains very strong

## COMPARISON OF RESORT AIR SERVICE - FLIGHTS, SEATS, CITIES

### 2017/18 WINTER (Nov-Apr)

RESORT	# Flight Departures	# Seats	# Nonstop Cities	NONSTOP CITIES	AVG FLIGHTS PER DAY	AIRLINES
Aspen (ASE)	4,210	294,216	10	ATL,DEN,DFW,IAH,LAX,MSP,ORD,PHX,SFO,SLC	23	AA, DL, UA
Vail/Beaver Creek (EGE)	1,847	240,320	14	ATL,DEN,DFW,EWR,IAD,IAH,JFK,LAX,MIA,ORD,PHX,SFO,SLC,YYZ	10	AA, AC, DL, UA
Jackson Hole (JAC)	1,867	208,860	12	ATL,DEN,DFW,EWR,IAH,JFK,LAX,MSP,ORD,SEA,SFO,SLC	10	AA, DL, UA
Montrose/Telluride (MTJ)	1,510	116,966	12	ATL,CLT,DEN,DFW,EWR,IAH,LAX,LGA,ORD,PHX,SFO,SLC	8	AA, DL, G4, UA
Steamboat Springs (HDN)	1,523	127,626	14	ATL,AUS,DEN,DFW,EWR,IAD,IAH,LAX,MCI,MSP,ORD,SAN,SEA,SFO	8	AA, AS, DL, UA, VC
Sun Valley (SUN)	900	65,719	7	DEN, LAX, ORD, PDX, SEA, SFO, SLC	5	AS, DL, UA
Mammoth (MMH)	438	32,664	3	LAX,SAN,SFO	2	AS, UA
Gunnison/Crested Butte (GUC)	479	38,198	3	DEN,DFW,IAH	3	AA, UA

\*New service

### 2017 SUMMER (May-Oct)

RESORT	# Flight Departures	# Seats	# Nonstop Cities	NONSTOP CITIES	AVG FLIGHTS PER DAY	AIRLINES
Jackson Hole (JAC)	2,284	276,213	11	ATL, DEN, DFW, IAH, LAX, MSP, ORD, PHX, SEA, SFO, SLC	12	AA, DL, UA
Aspen (ASE)	2,072	144,915	7	DEN,DFW,IAH,LAX,ORD,SFO,SLC	11	AA, DL, UA
Sun Valley (SUN)	959	68,980	6	DEN,LAX,PDX, SEA,SFO,SLC	5	AS, DL, UA
Montrose/Telluride (MTJ)	1,039	64,338	5	DEN, DFW,IAH,ORD,PHX	6	AA, UA
Vail/Beaver Creek (EGE)	441	45,134	3	DEN,DFW,IAH	2	AA, UA
Steamboat Springs (HDN)	346	23,966	2	DEN,IAH	2	UA
Gunnison/Crested Butte (GUC)	221	12,194	2	DEN,IAH	1	UA
Mammoth (MMH)	159	12,084	1	LAX	1	AS

\*New service

### TOTAL ANNUAL

RESORT	# Flight Departures	# Seats	# Nonstop Cities	NONSTOP CITIES	AVG FLIGHTS PER DAY	AIRLINES
Jackson Hole (JAC)	4,151	485,073	13	ATL,DEN,DFW,EWR,IAH,JFK,LAX,MSP,ORD,PHX,SEA,SFO,SLC	11	AA, DL, UA
Aspen (ASE)	6,282	439,131	10	ATL,DEN,DFW,IAH,LAX,MSP,ORD,PHX,SFO,SLC	17	AA, DL, UA
Vail/Beaver Creek (EGE)	2,288	285,454	14	ATL,DEN,DFW,EWR,IAD,IAH,JFK,LAX,MIA,ORD,PHX,SFO,SLC,YYZ	6	AA, AC, DL, UA
Montrose/Telluride (MTJ)	2,549	181,304	12	ATL,CLT,DEN,DFW,EWR,IAH,LAX,LGA,ORD,PHX,SFO,SLC	7	AA, DL, G4, UA
Steamboat Springs (HDN)	1,869	151,592	14	ATL,AUS,DEN,DFW,EWR,IAD,IAH,LAX,MCI,MSP,ORD,SAN,SEA,SFO	5	AA, AS, DL, UA, VC
Sun Valley (SUN)	1,859	134,699	7	DEN, LAX, ORD, PDX, SEA, SFO, SLC	5	AS, DL, UA
Mammoth (MMH)	597	44,748	3	LAX,SAN,SFO	2	AS, UA
Gunnison/Crested Butte (GUC)	700	50,392	3	DEN,DFW,IAH	2	AA, UA

\*New service



# FY18 STRATEGIC GOALS

## Retain & Improve Air Service

- Retain contracted nonstop SEA, LAX, SFO, DEN, PDX, ORD flights
- Support SLC flights; continue to advocate and promote frequency
- Work to strategically optimize schedules for all flights
- Work with airlines & marketing partners to increase load factors
- Pursue new flight market opportunities
- Support SUN airport improvements
  - Reliability
  - Infrastructure
  - Operations



## Research

- Conduct Air Passenger Surveys at SUN (expand to 12 months)
- Continue competitive analysis, economic impact and air service ROI research

## Local Air Marketing/Community Outreach

- Continue local educational/promotional outreach efforts on air service, FLY SUN



# FY18 WINTER UPDATE

- ❖ **NEW!** United Chicago (ORD) nonstop weekly flight
  - Holiday flights strong, but overall season affected by lack of snow
  - Fewer diversions, enhanced communications with passengers and others
    - Welcoming educational video on busses enroute from TWF or BOI to SUN
    - Text messages to hotel shuttles, taxis, car rentals, re: bus departure times from TWF, BOI





# SUMMER 2018 UPDATE

- Finalizing schedule for summer/fall service – to be announced soon



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# FSVA AIR SERVICE PARTNERS

## FLY SUN VALLEY ALLIANCE SUN VALLEY AIR SERVICE KEY PARTNERS

SUN VALLEY  
AIR SERVICE BOARD



Plus.....

The Wood River Valley Community

Over 50 Local Businesses



# AIR SERVICE = BUSINESS

The investment in air service is working for our community.

THANK YOU

