



# **Friedman Memorial Airport (SUN) Air Passenger Survey: 2013 Annual Results Summary**



**Prepared for:** Fly Sun Valley Alliance  
in partnership with Friedman Memorial Airport  
**Prepared by:** RRC Associates

**November 2013**

# Outline

- Summary
- Methodology
- Visitor Demographics
- Trip Planning
- Trip Characteristics
- Ratings of Experience

# SUMMARY

- **SUN PASSENGERS**

- 72% Visitors/PT Residents, 28% Locals

- **ECONOMIC IMPACT** (of SUN Visitors/PT Resident Passengers):

- \$61 Million annually in Direct Spending

- **75% of visitors/PT residents said SUN was very-extremely important factor in their decision to visit.**

- **HOW TO IMPROVE SUN?**

- Add more flights, reduce diversions, lower fares

# Methodology

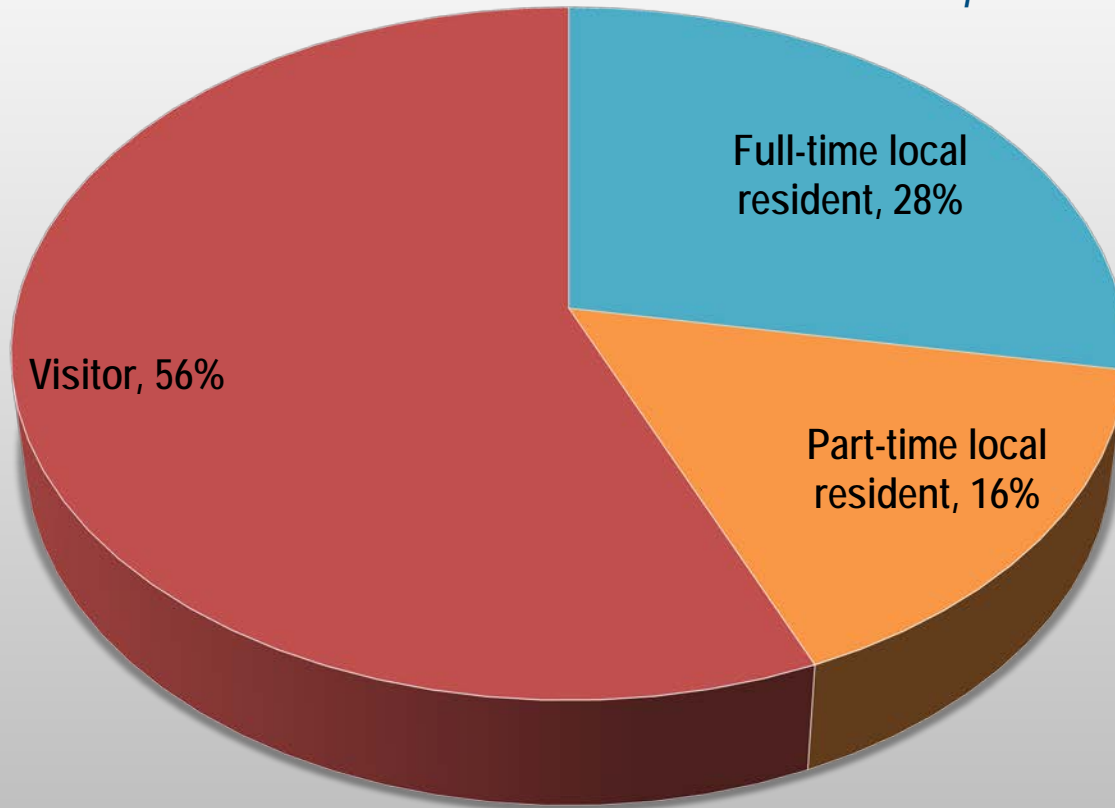
- Intercept survey conducted in SUN passenger waiting area
- 1,177 survey completes in Jan-Apr and Jun-Sep, 2013
  - 95% confidence interval +/-2.9% (larger for subgroups)
- Sampling plan designed to capture representative passenger mix by flight
  - Results weighted to be representative of actual flight mix
- Most survey questions focus on visitor experience (but locals surveyed too)
  - Presentation focuses on results for visitors and part-time locals

# Outline

- Methodology
- Visitor Demographics
- Trip Planning
- Trip Characteristics
- Ratings of Experience

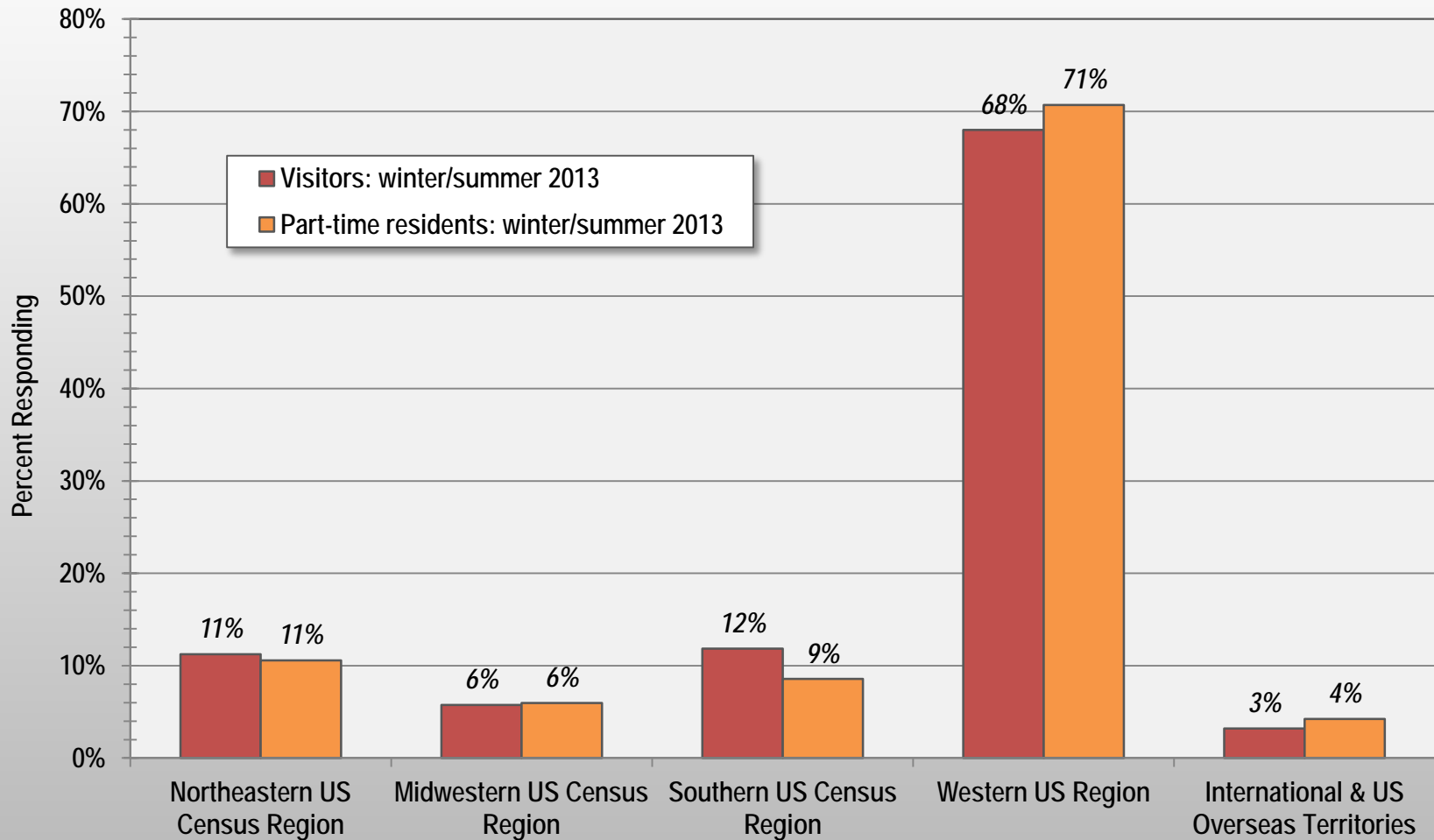
# Resident - Visitor Mix

*FT locals excluded from remainder of this presentation, except where specifically noted.*

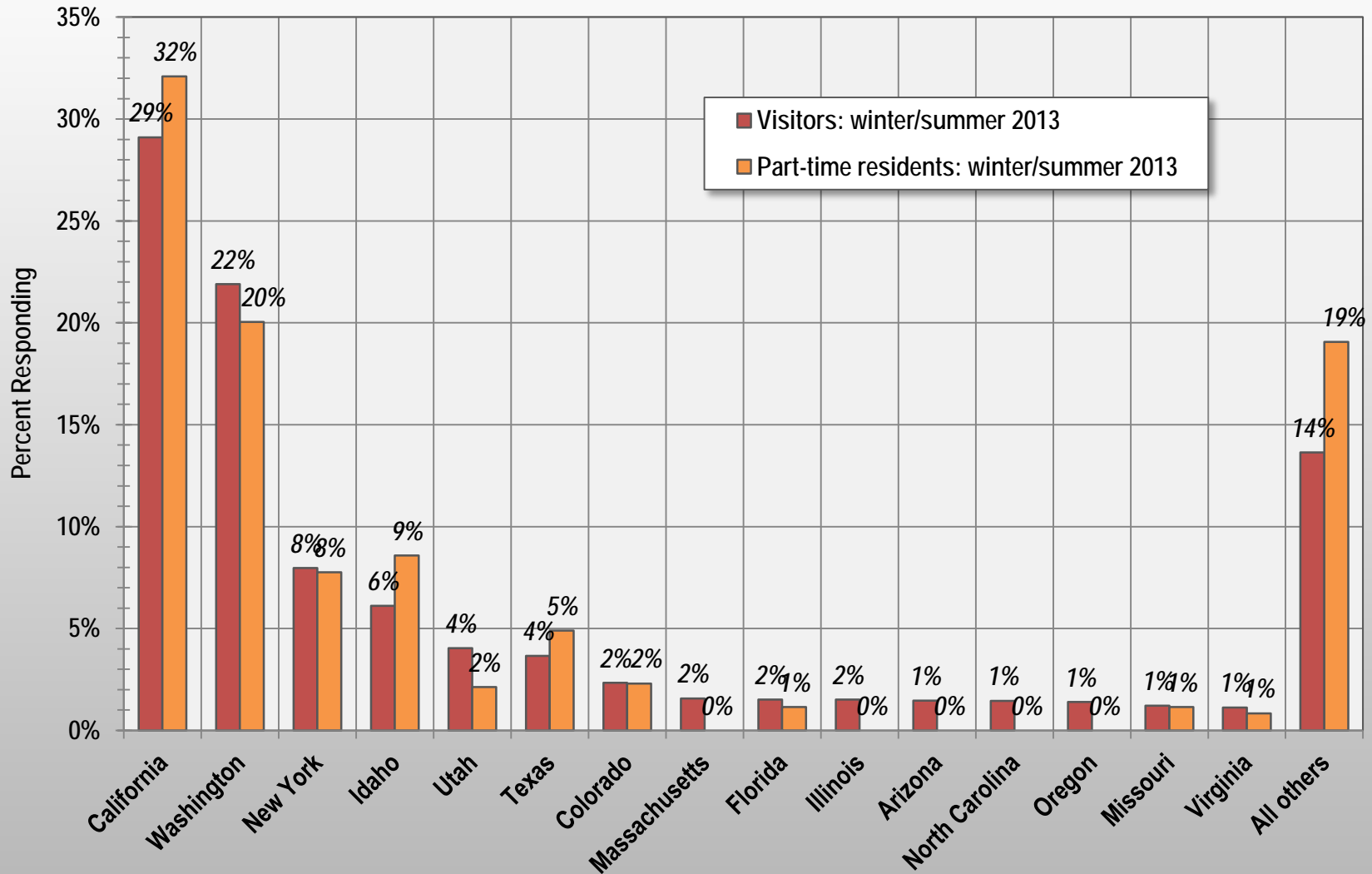


Note: Full-time locals are defined as living in area more than 3 mo/yr.  
Part-time locals are defined as living in area 3 or fewer mo/yr.

# Visitor Origin by US Census Region

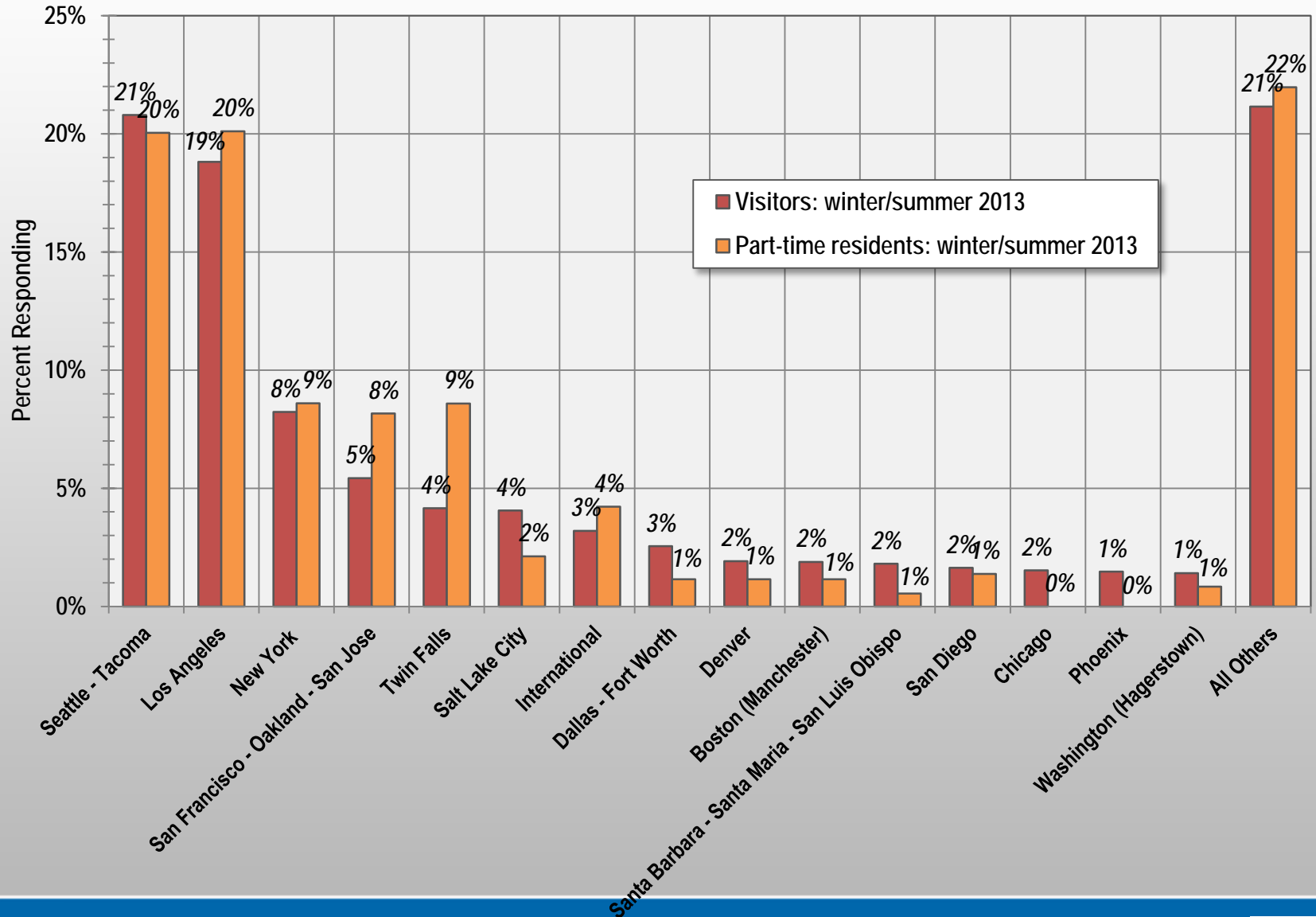


# Top States/ Countries

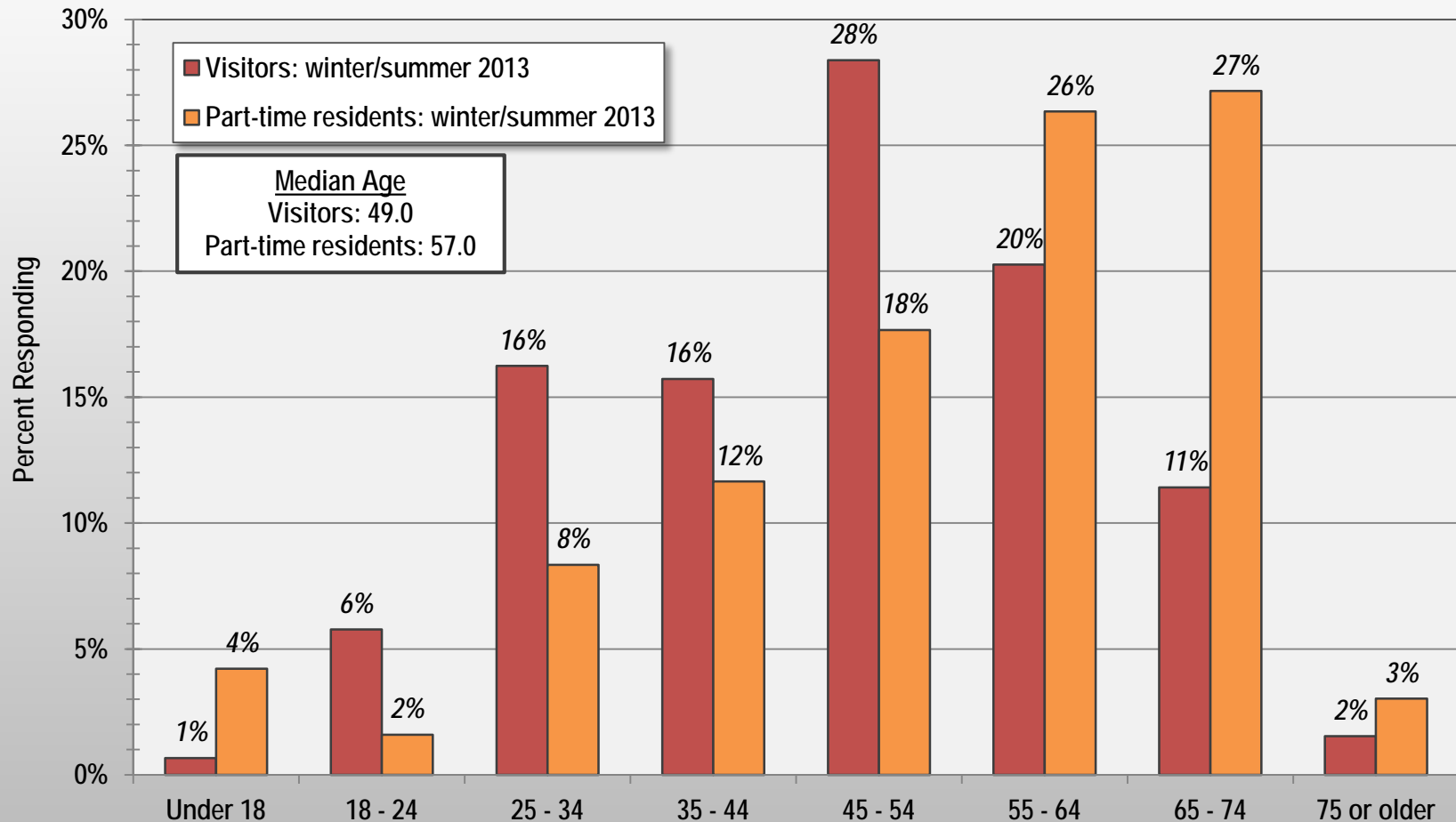




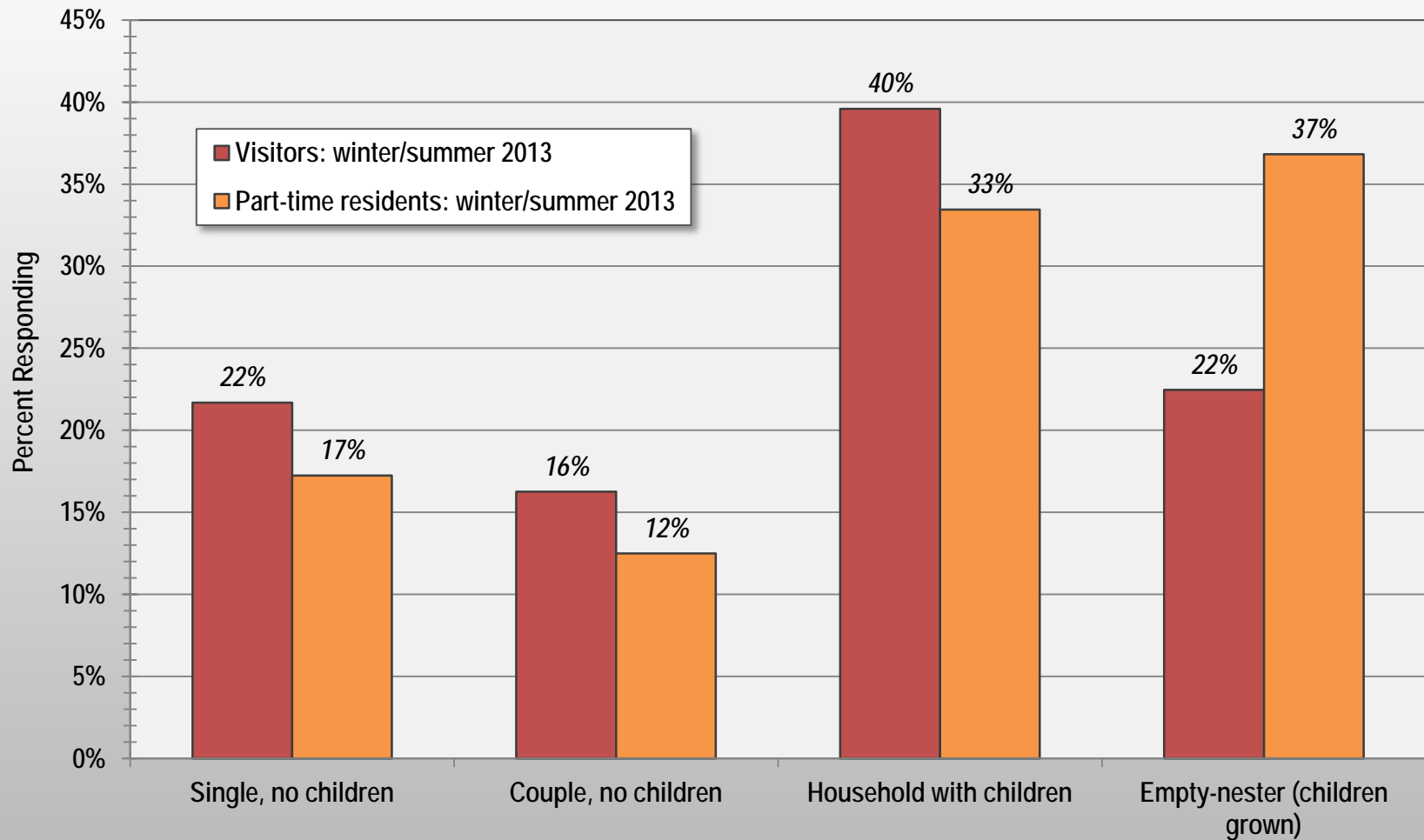
# Top Designated Market Areas



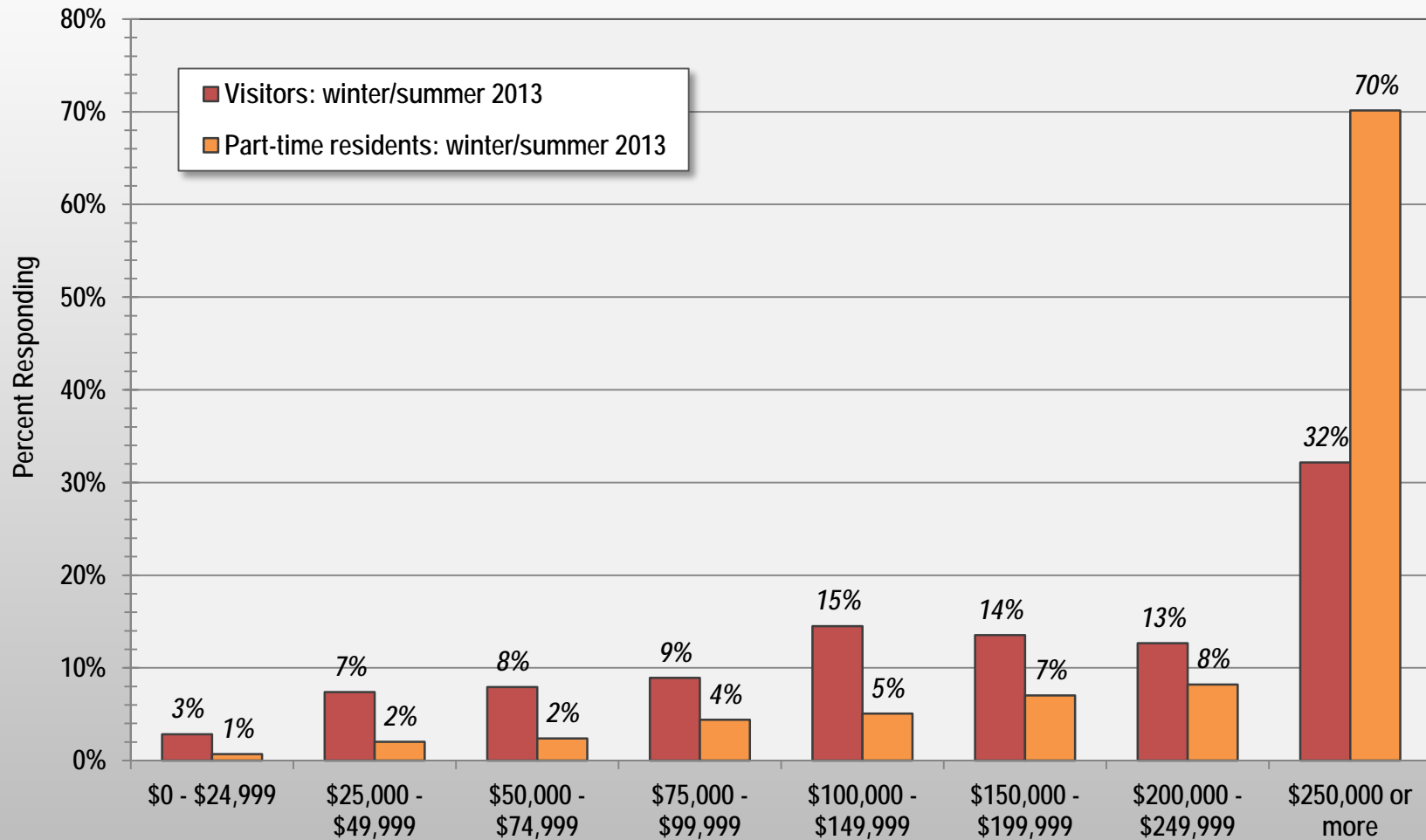
# Age



# Household/ Family Status

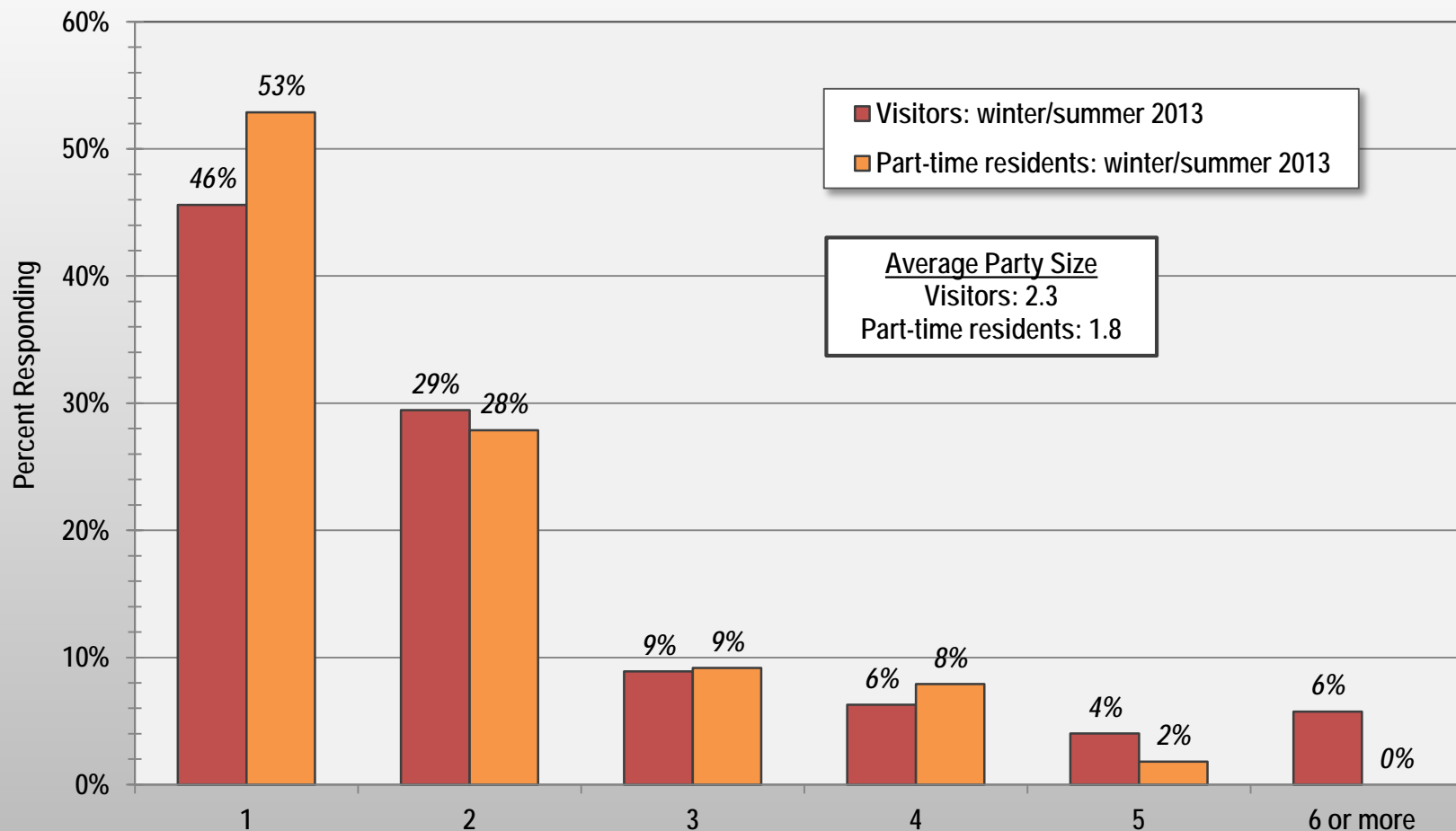


# HH Income (before taxes)

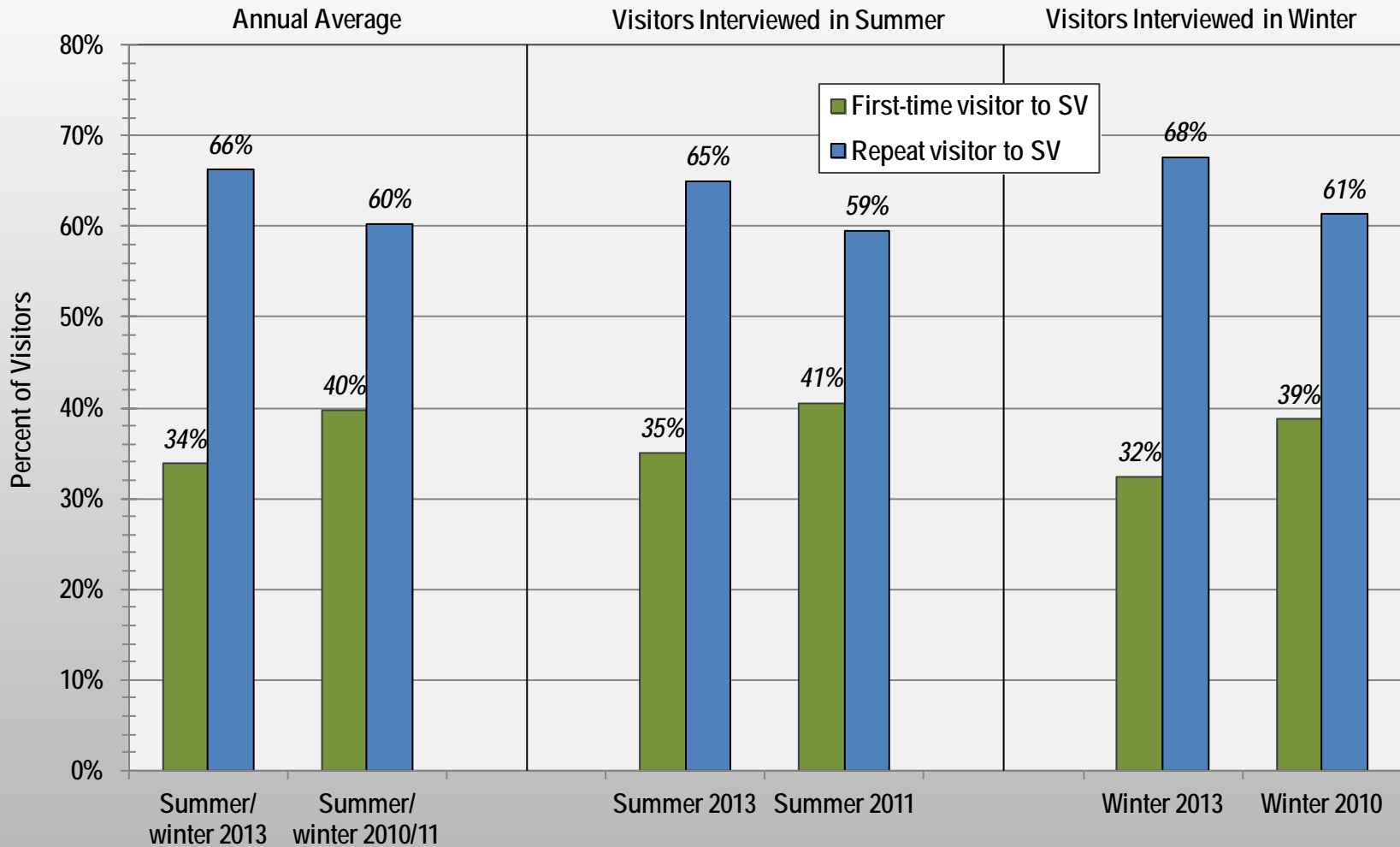


*A notable 70% of PT residents earn \$250K+ compared to 32% of visitors*

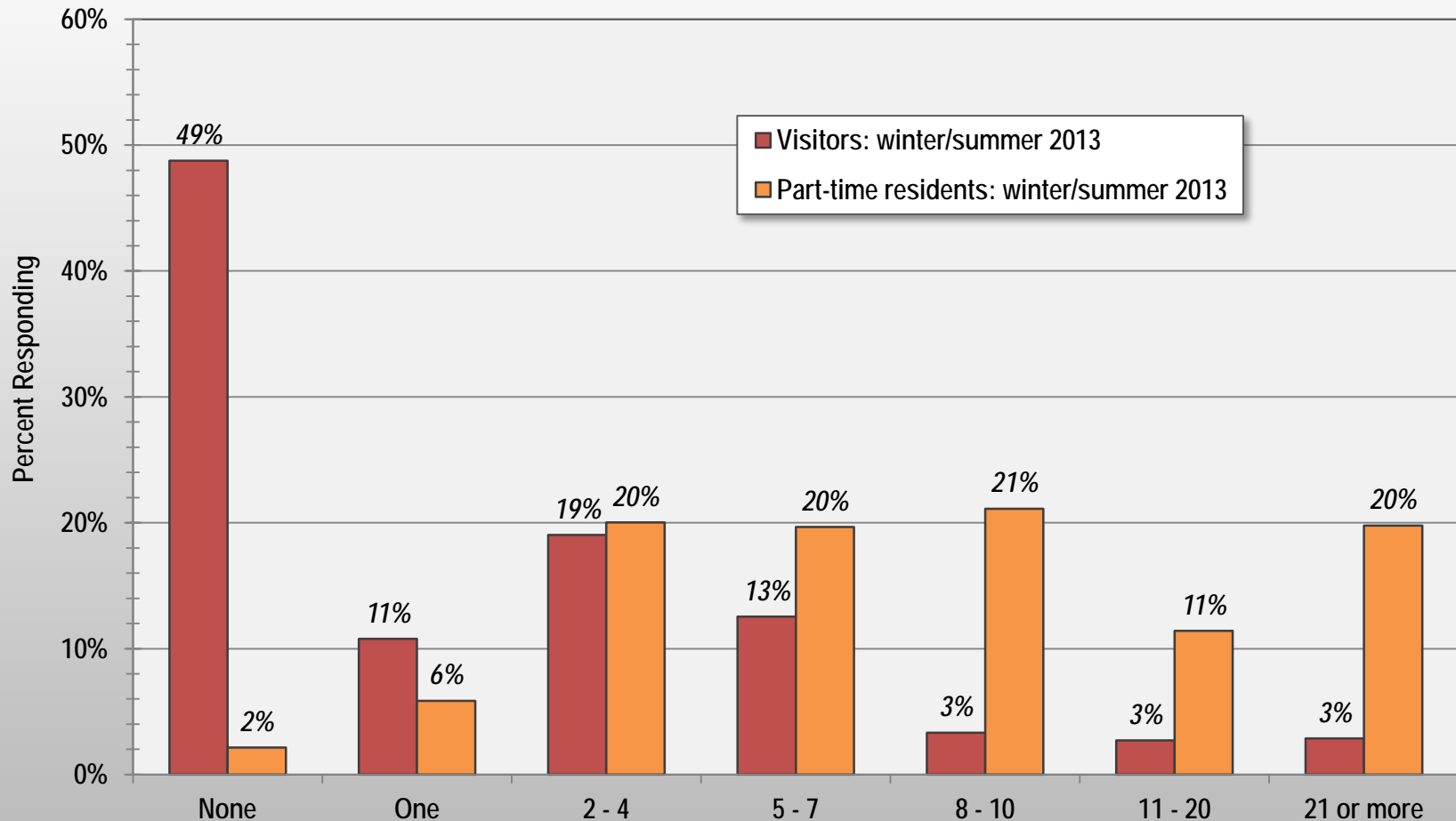
# Number of Travelers in Party



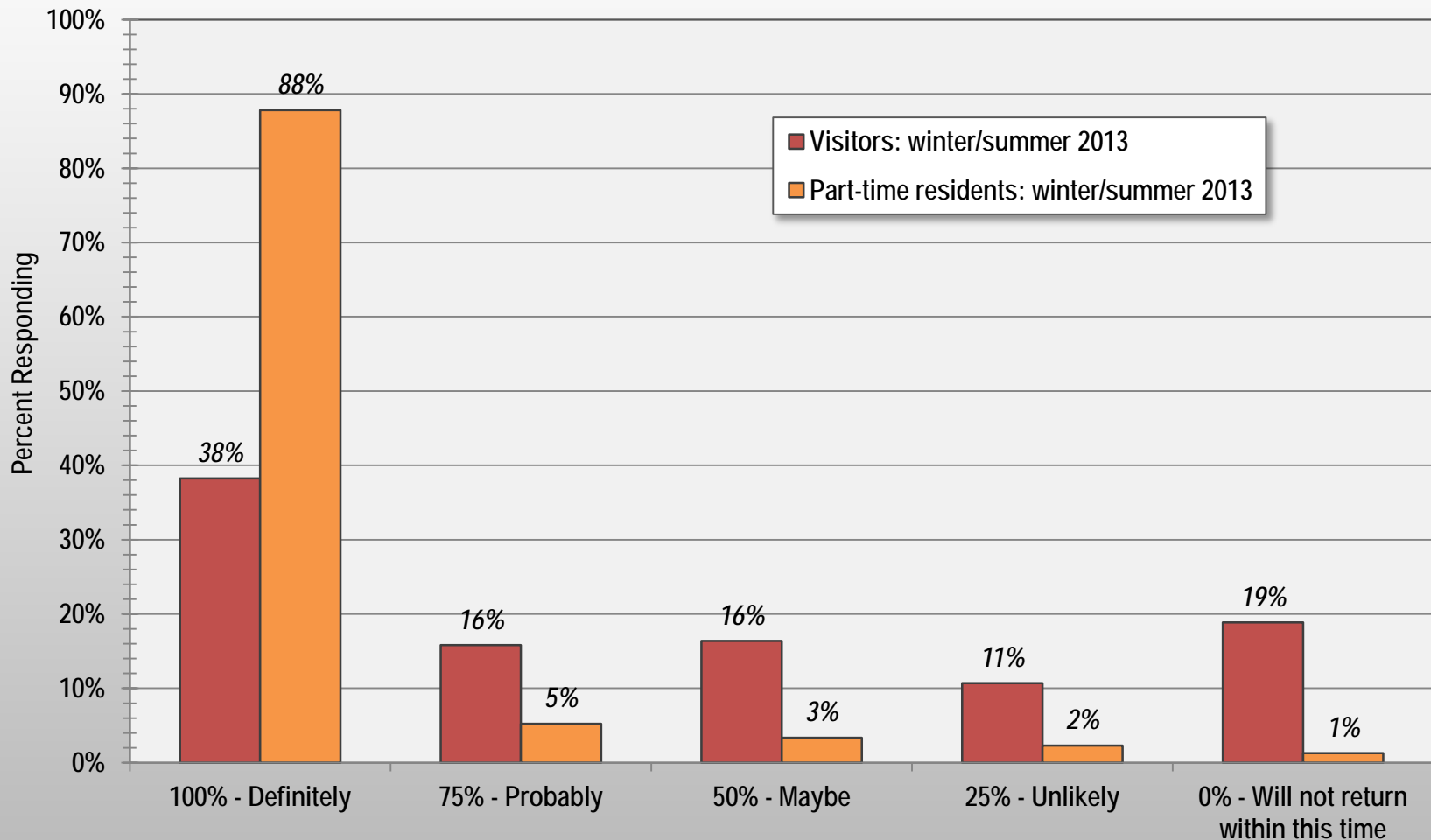
# Share of Visitors on 1<sup>st</sup> Trip to SV



# Previous Winter Visits in Past 5 Years

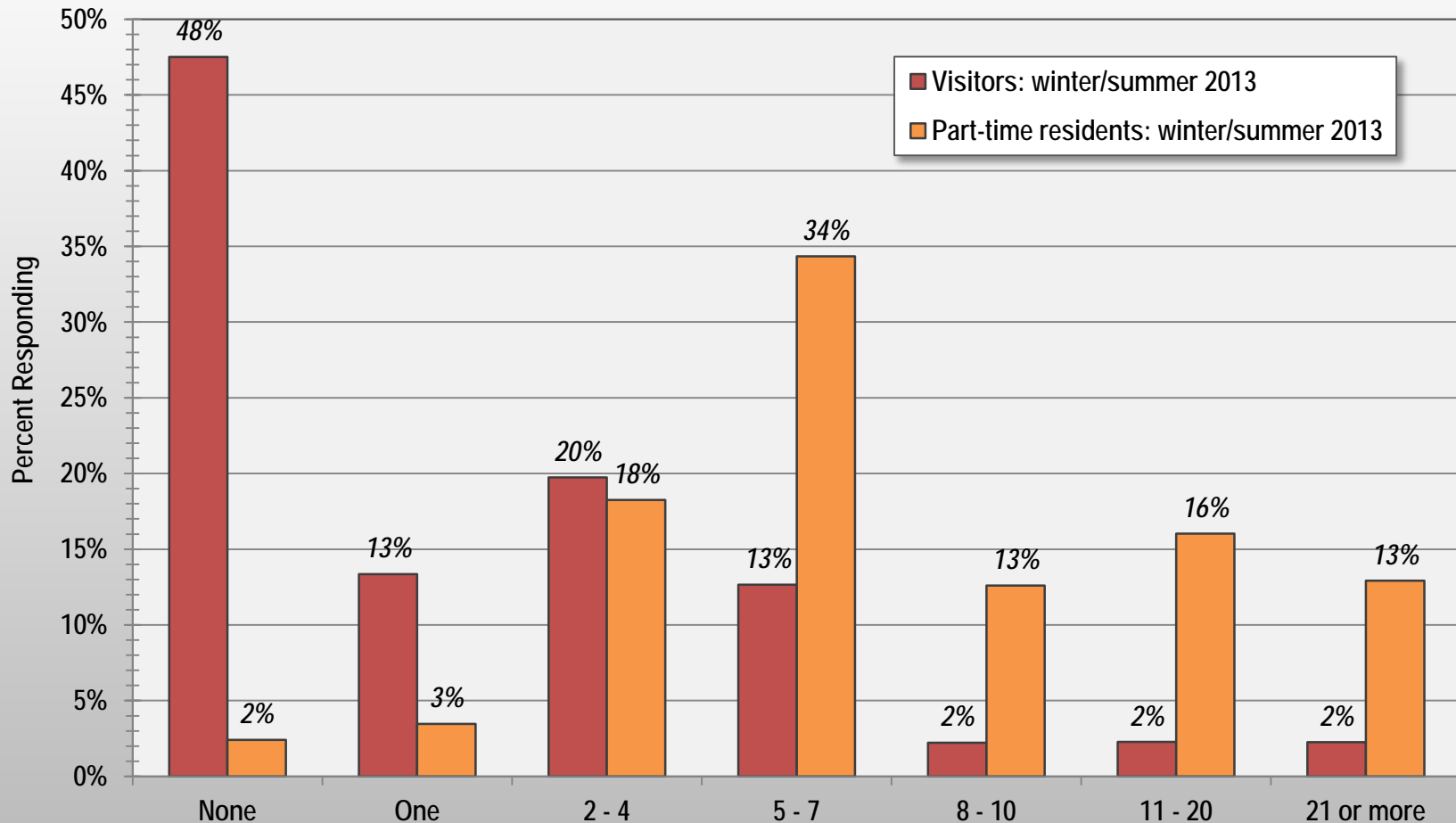


# Likelihood of Return Within Next 3 Winters

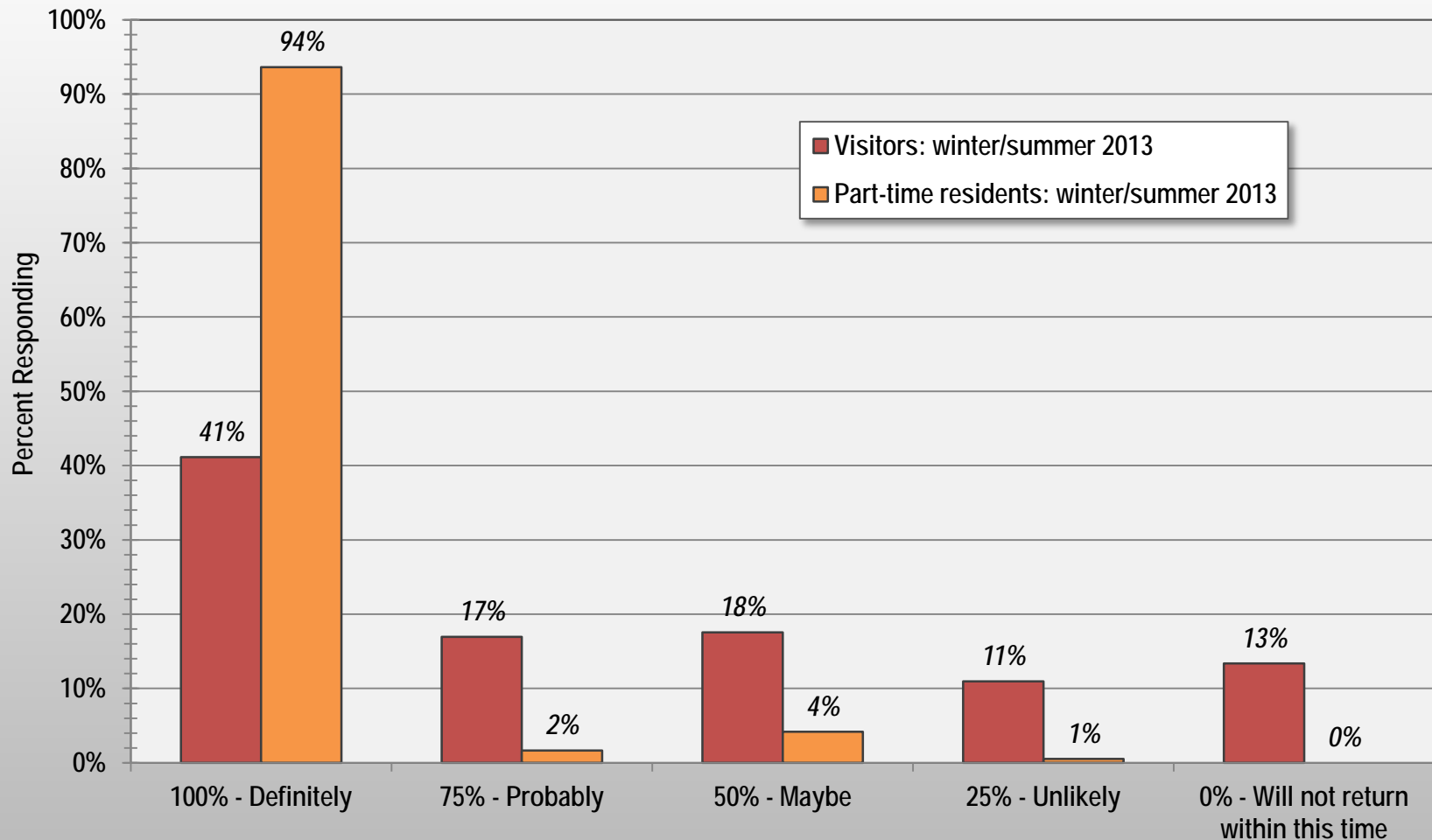




# Previous Summer Visits in Past 5 Years



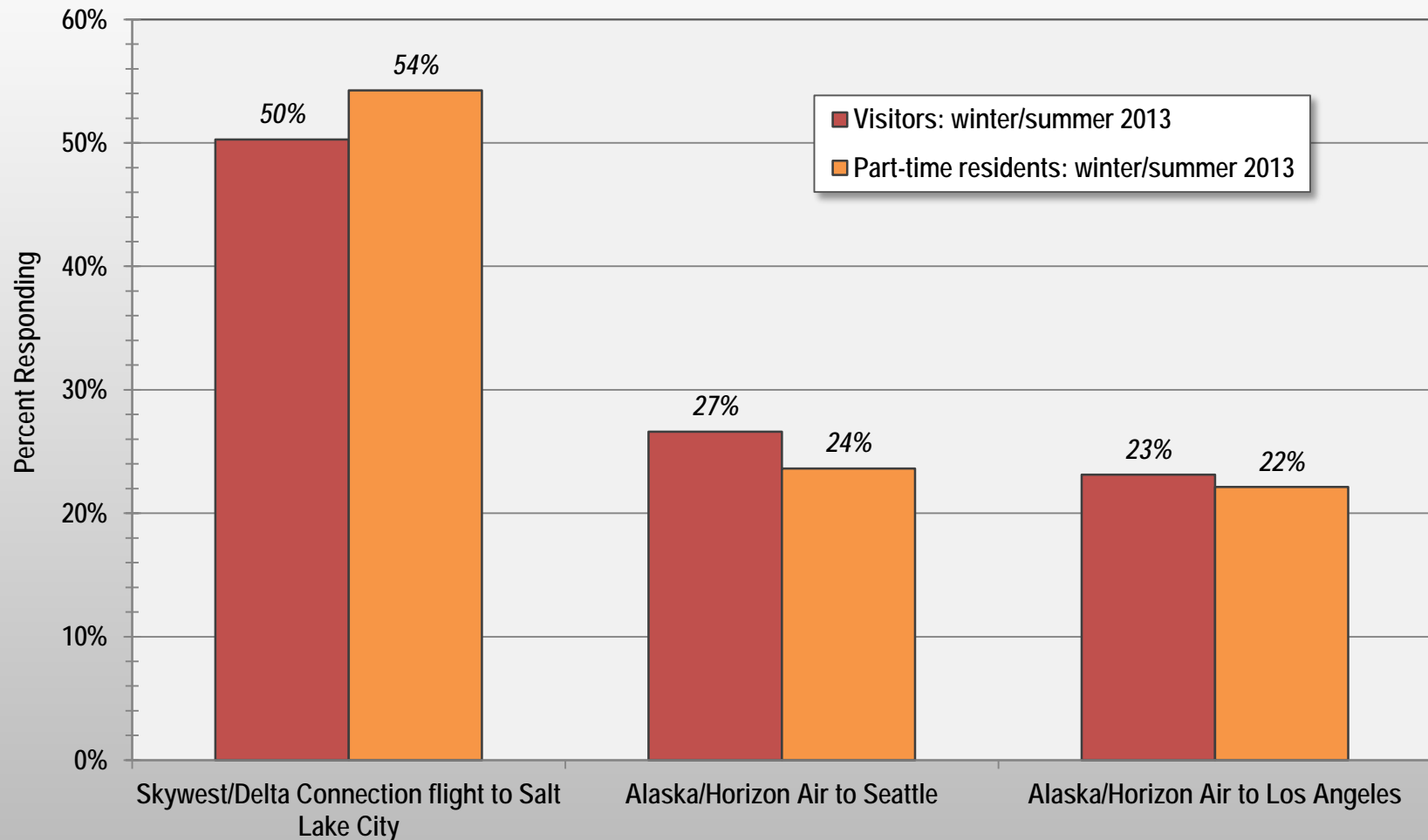
# Likelihood of Return Within Next 3 Summers



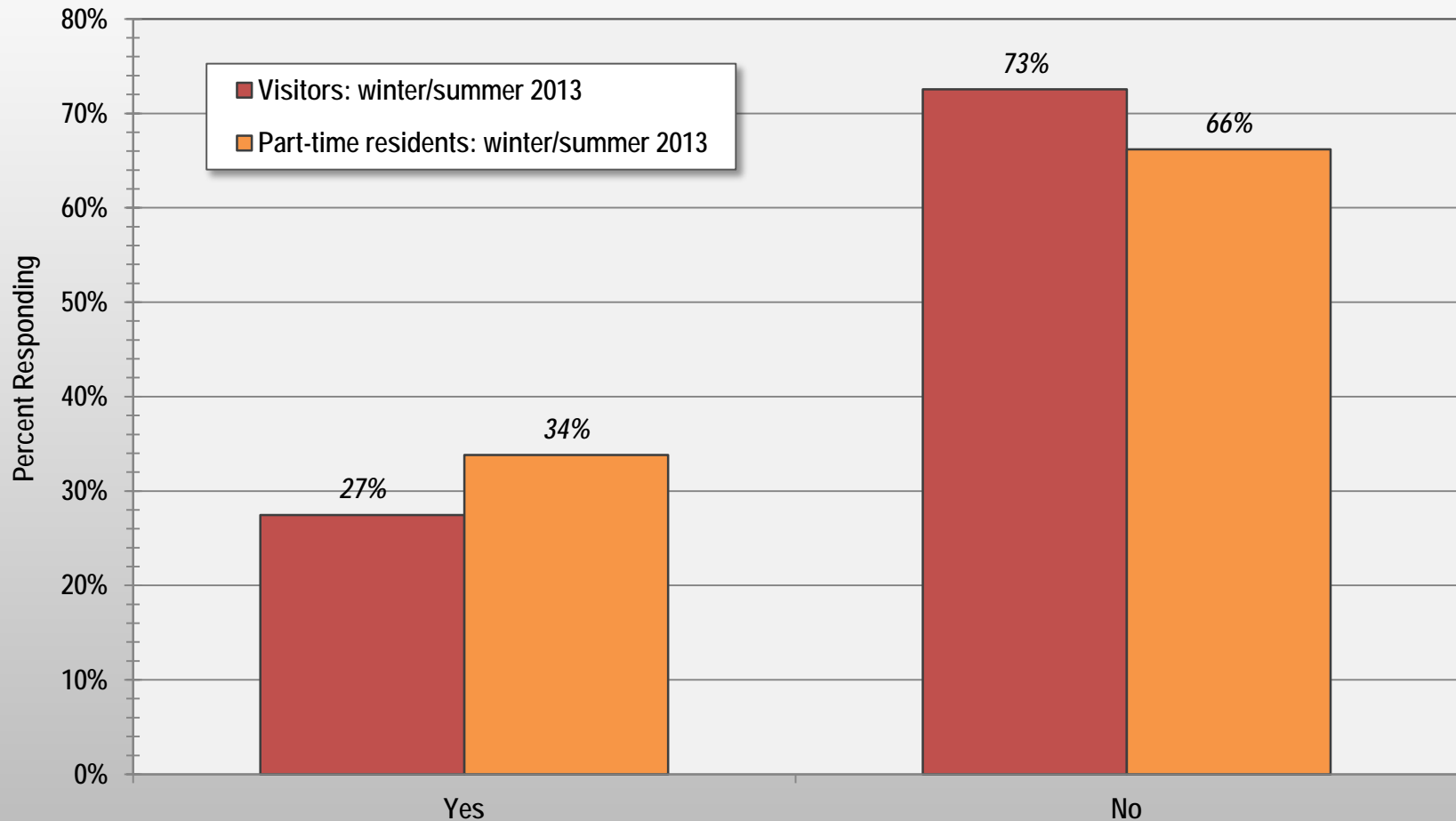
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- Methodology
- Visitor Demographics
- **Trip Planning**
- Trip Characteristics
- Ratings of Experience

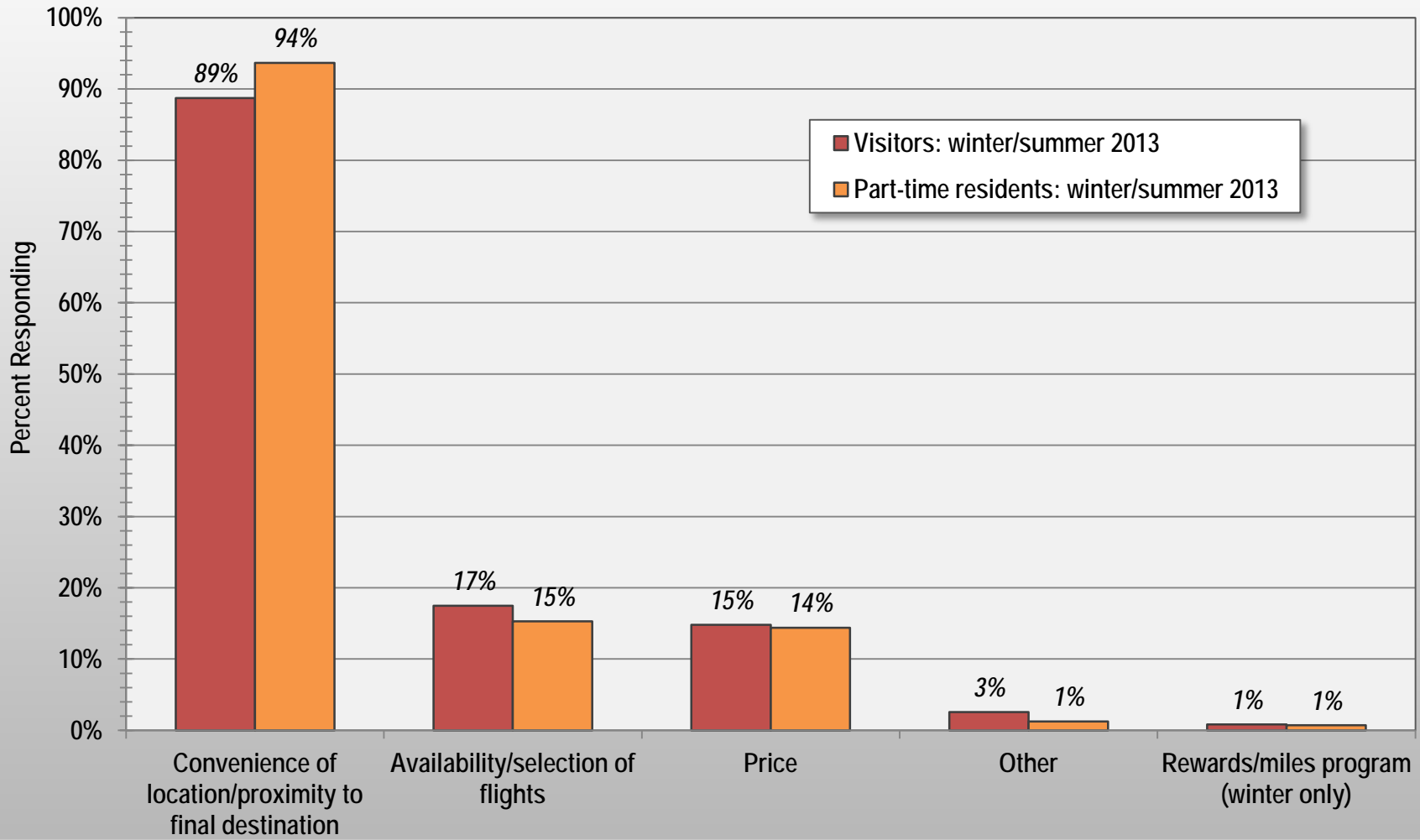
# On which flight are you departing today?



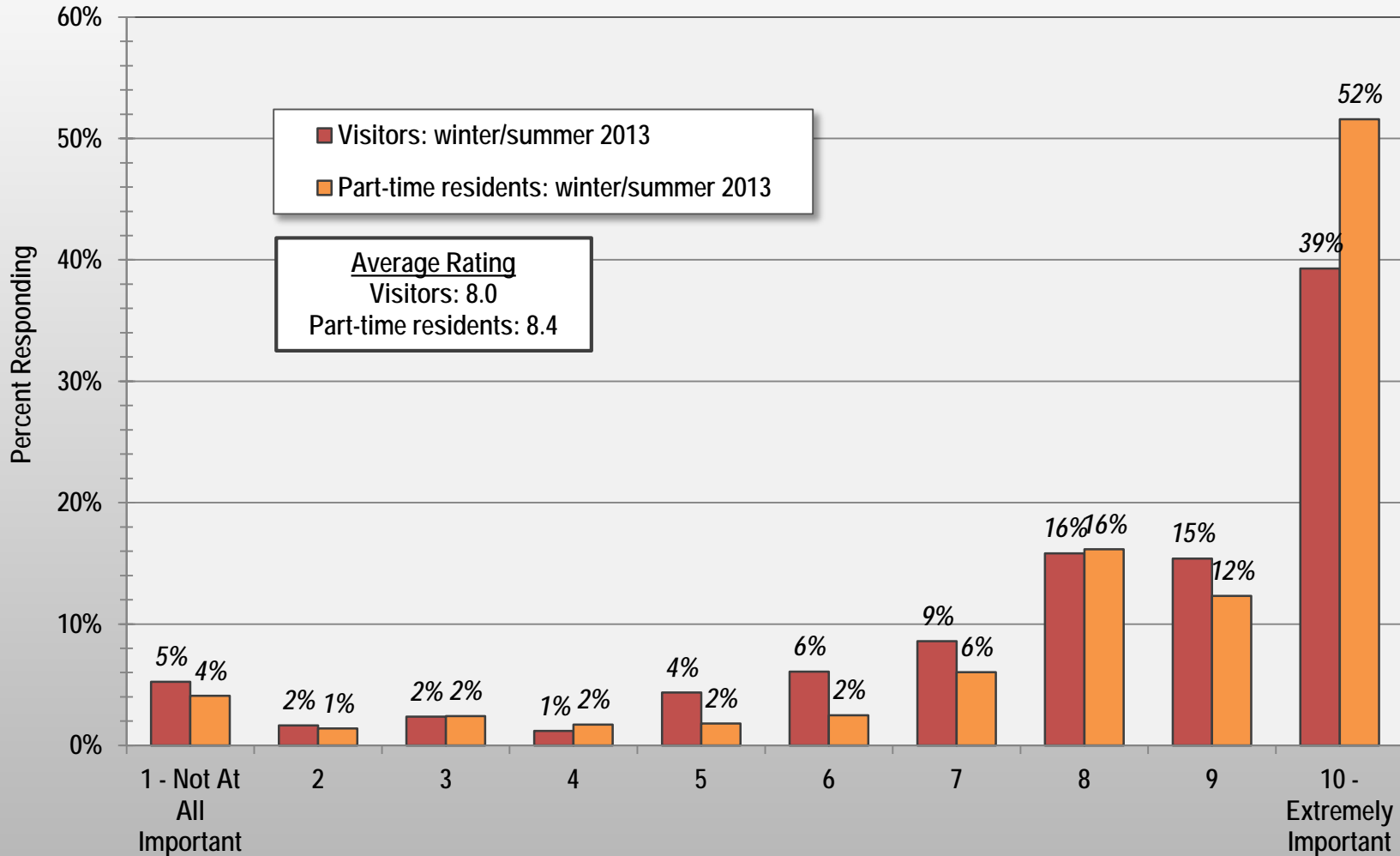
# Did you consider other airports for this trip?



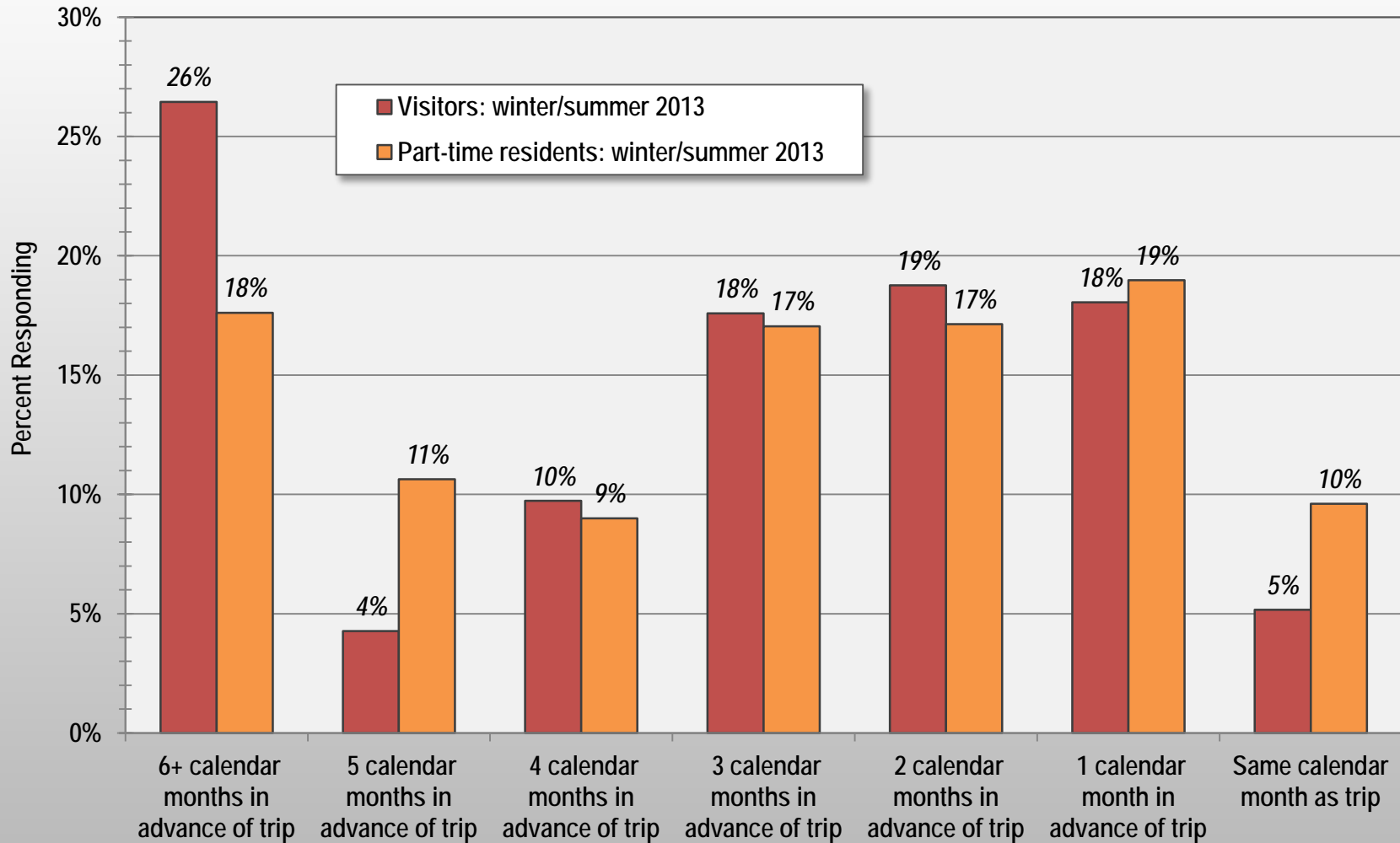
# (If considered other airports for this trip) Why did you choose SUN?



# Importance of Flights to SUN in Decision to Visit SV

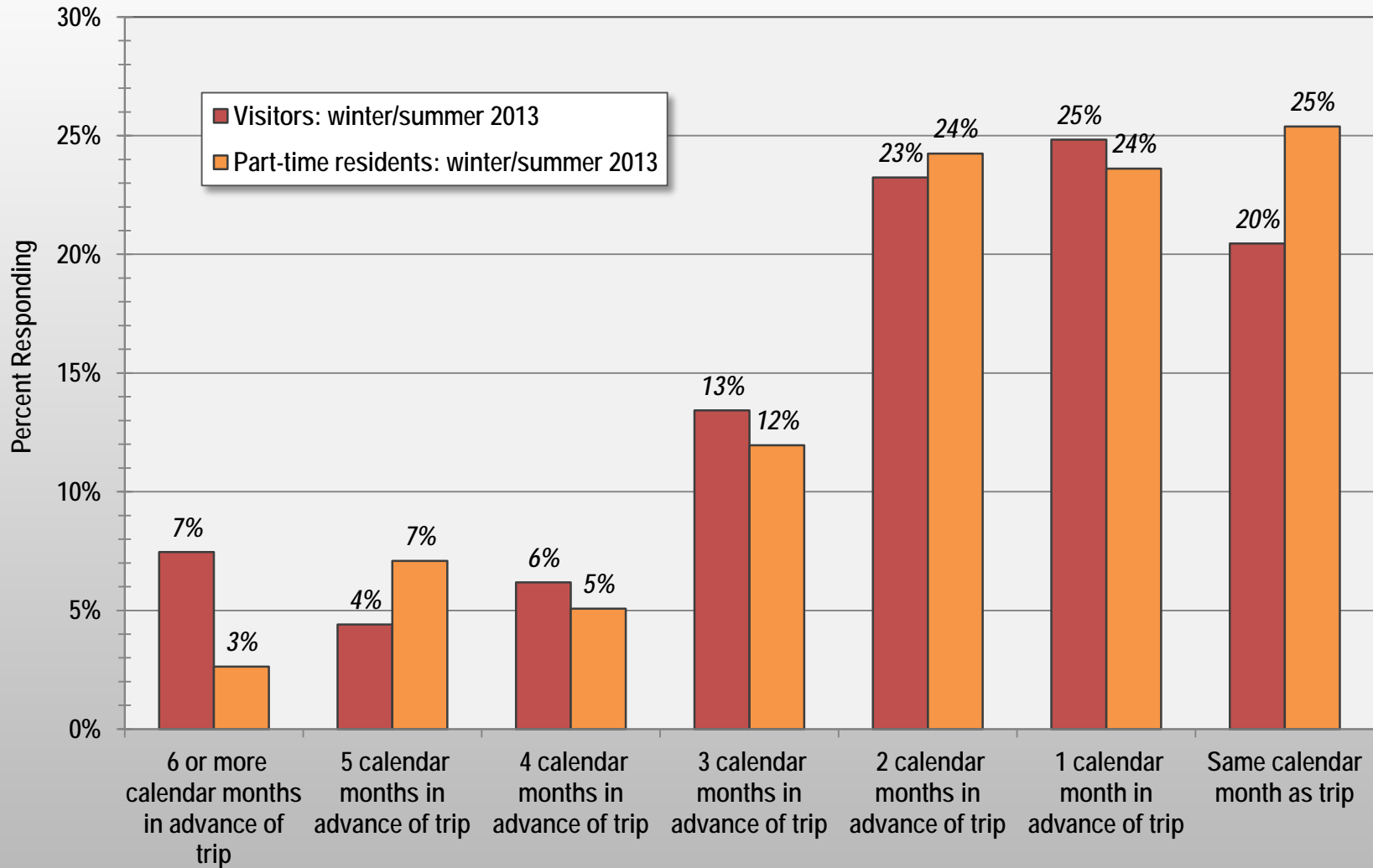


# Trip Consideration Lead Time

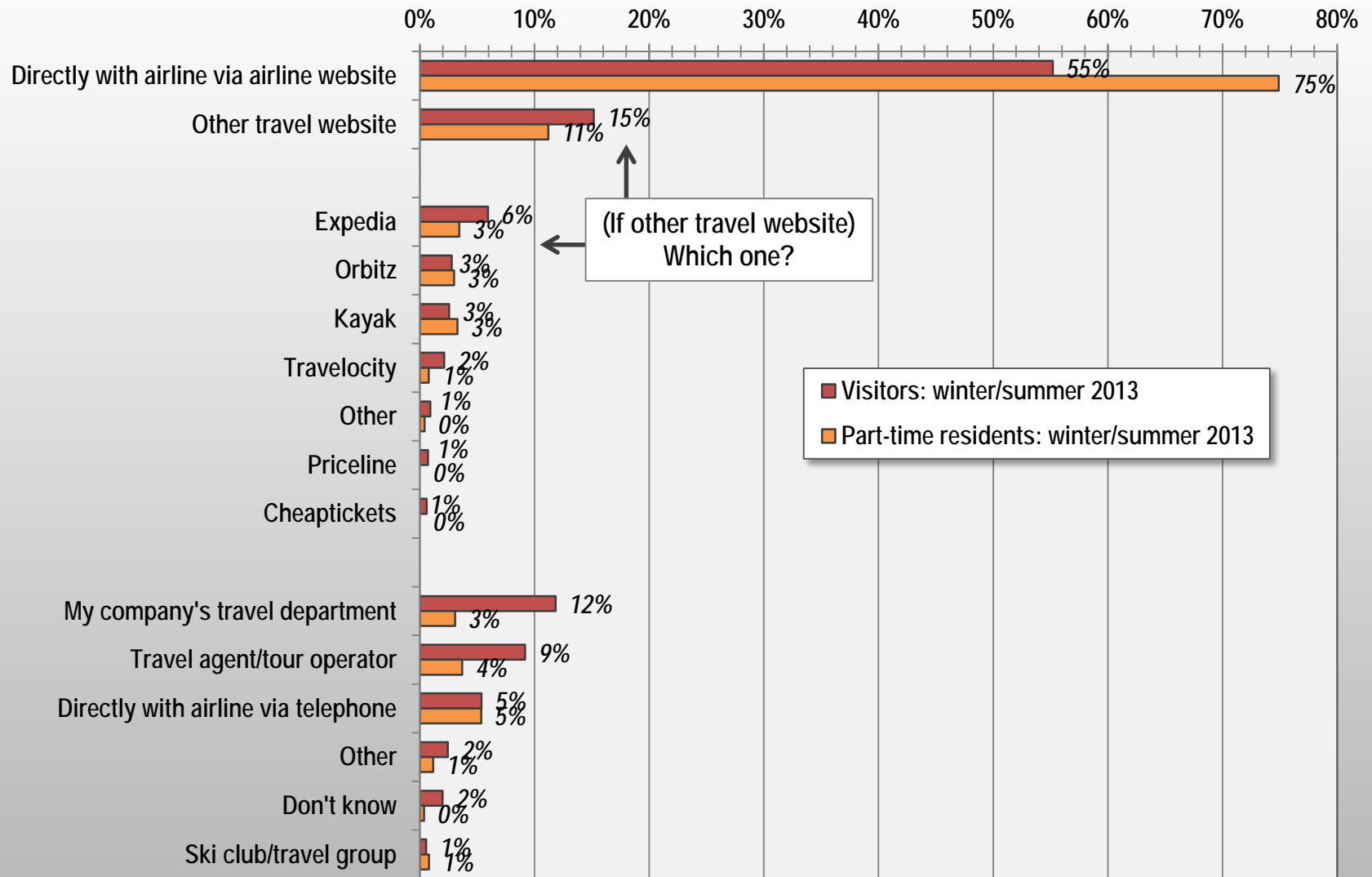




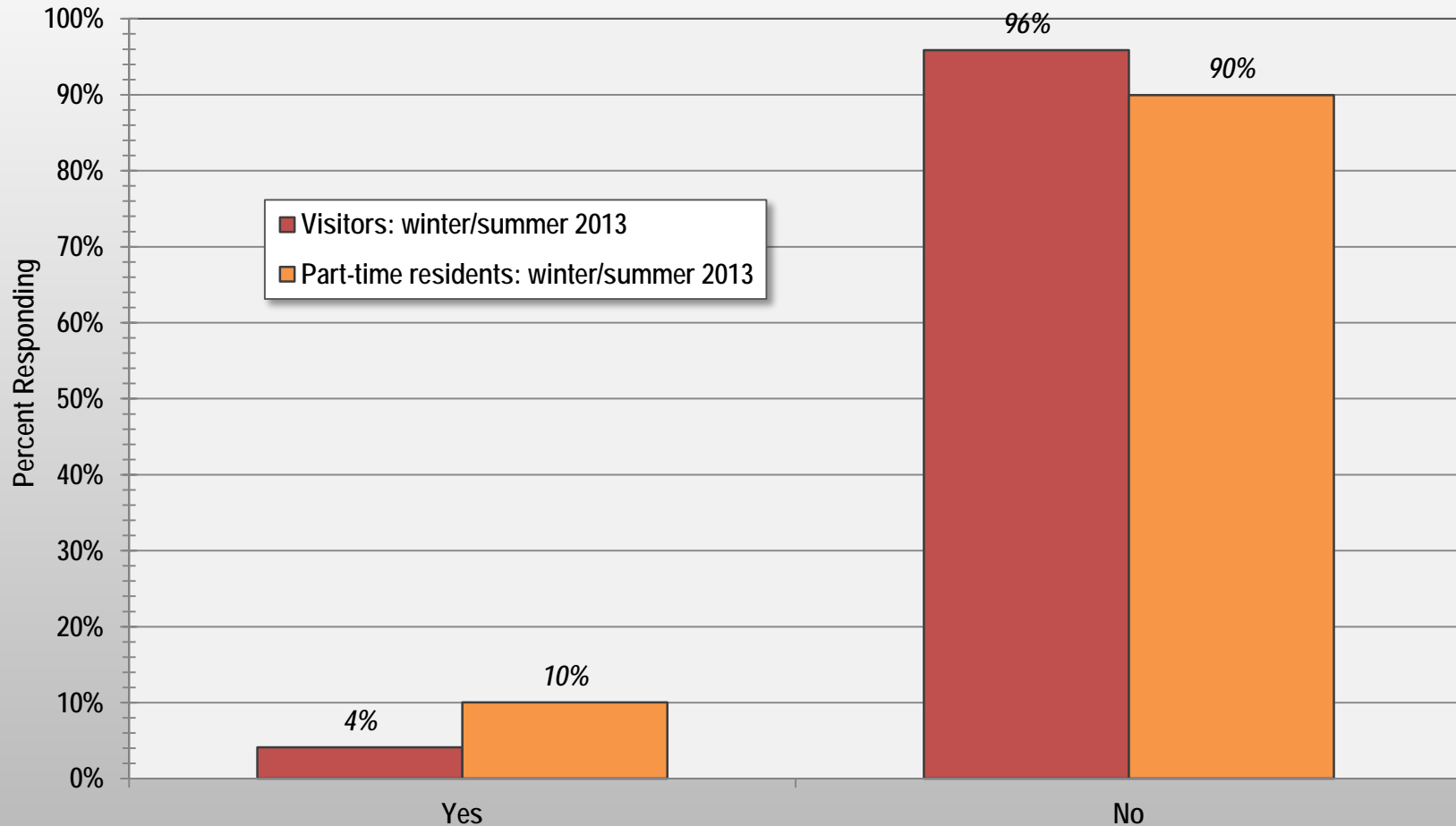
# Flight Booking Lead Time



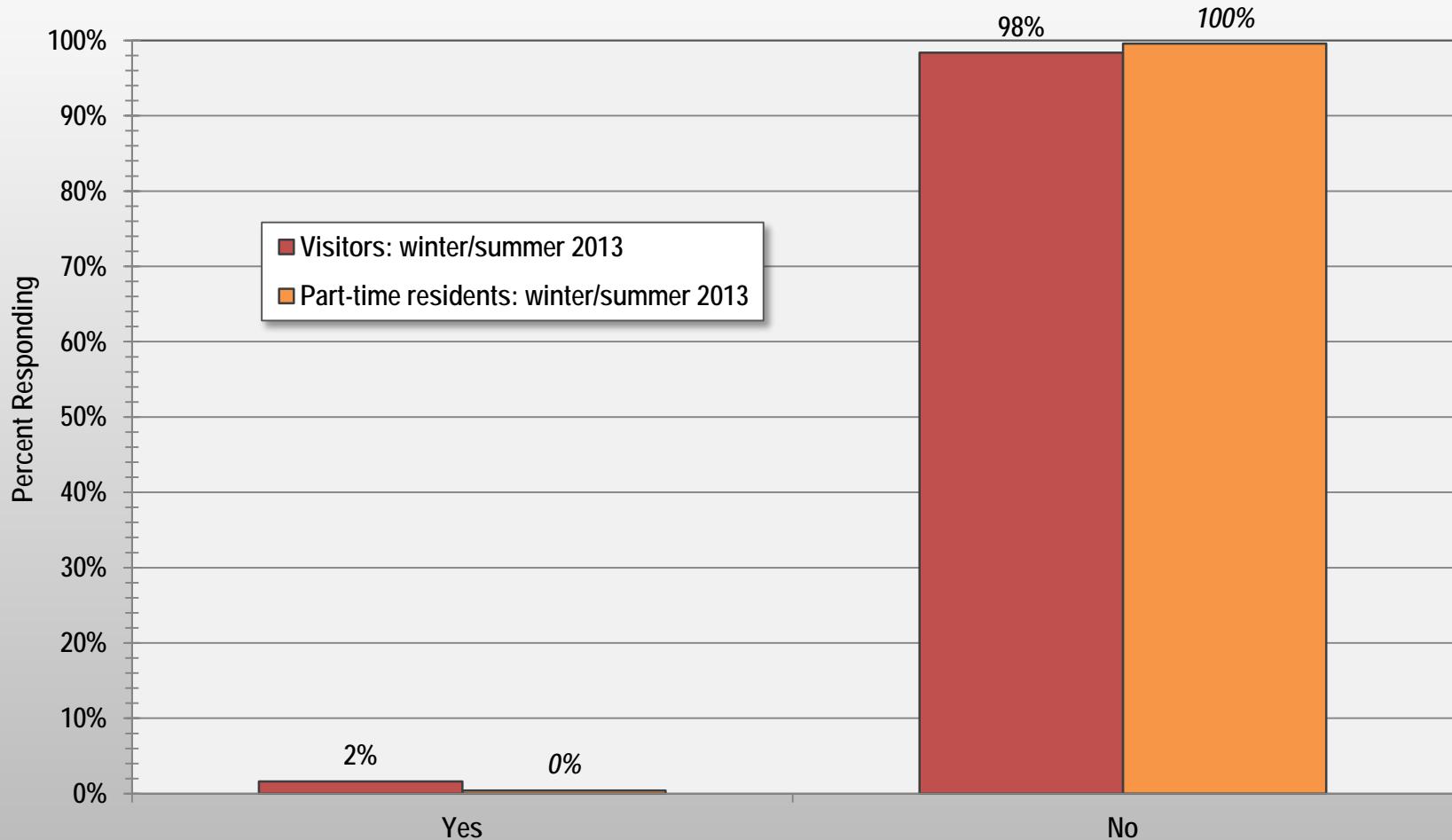
# Flight Booking Method



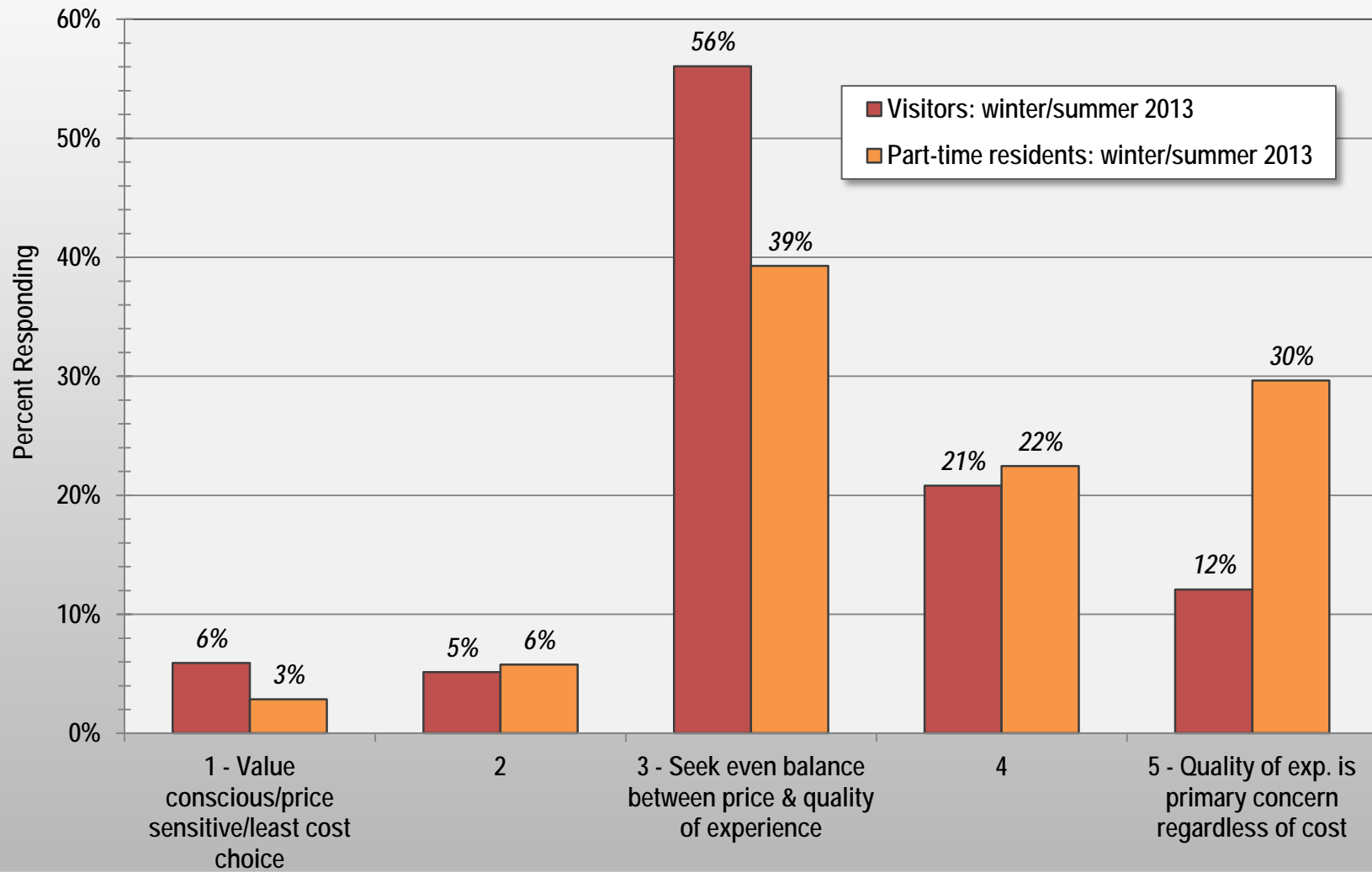
# Did you experience any problems in making airline reservations to/from Sun Valley area this trip?



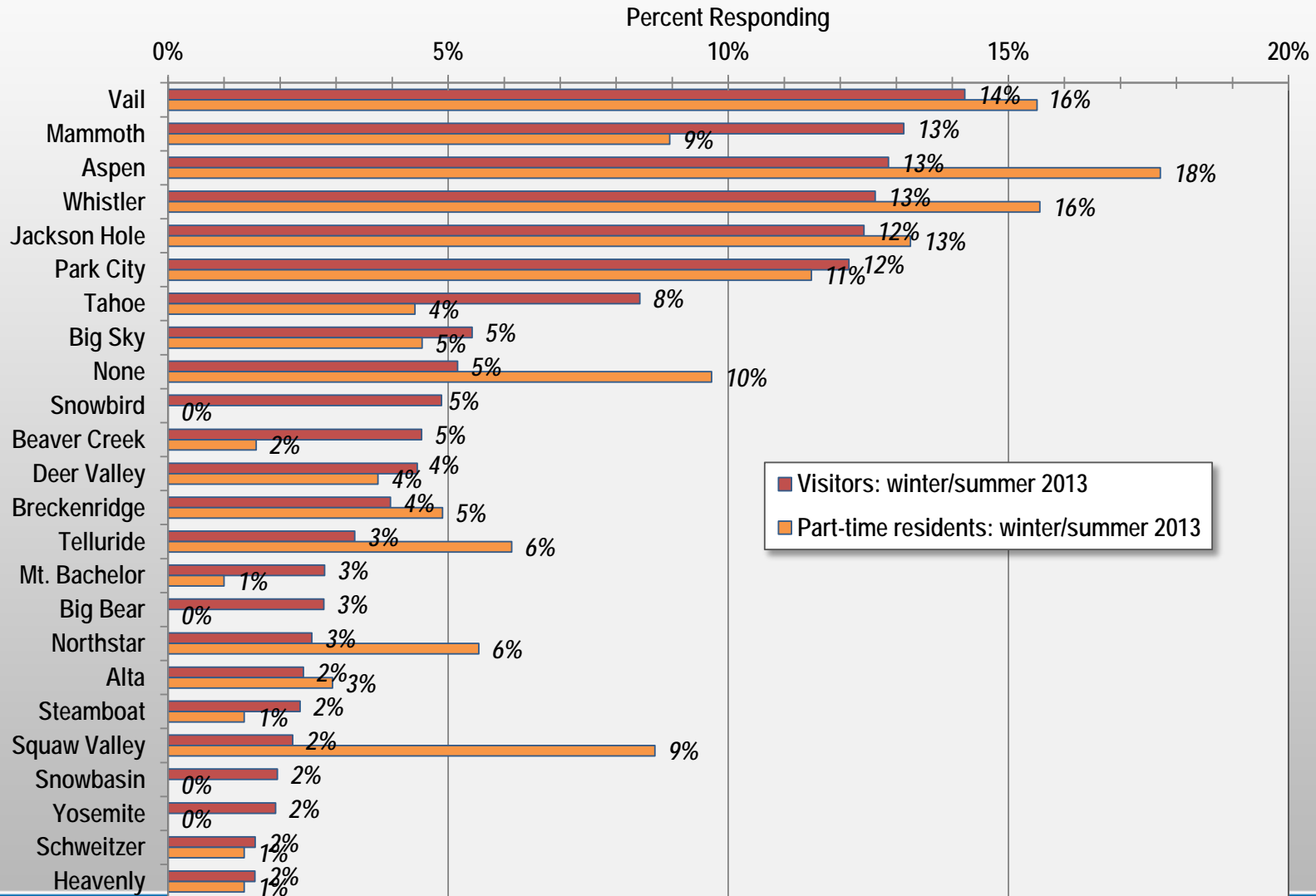
# Did you use a travel package?



# How would you classify yourself in planning vacations to mtn resorts?



# Other Mountain Resorts Visited for Overnight Trips in Past 3 Years

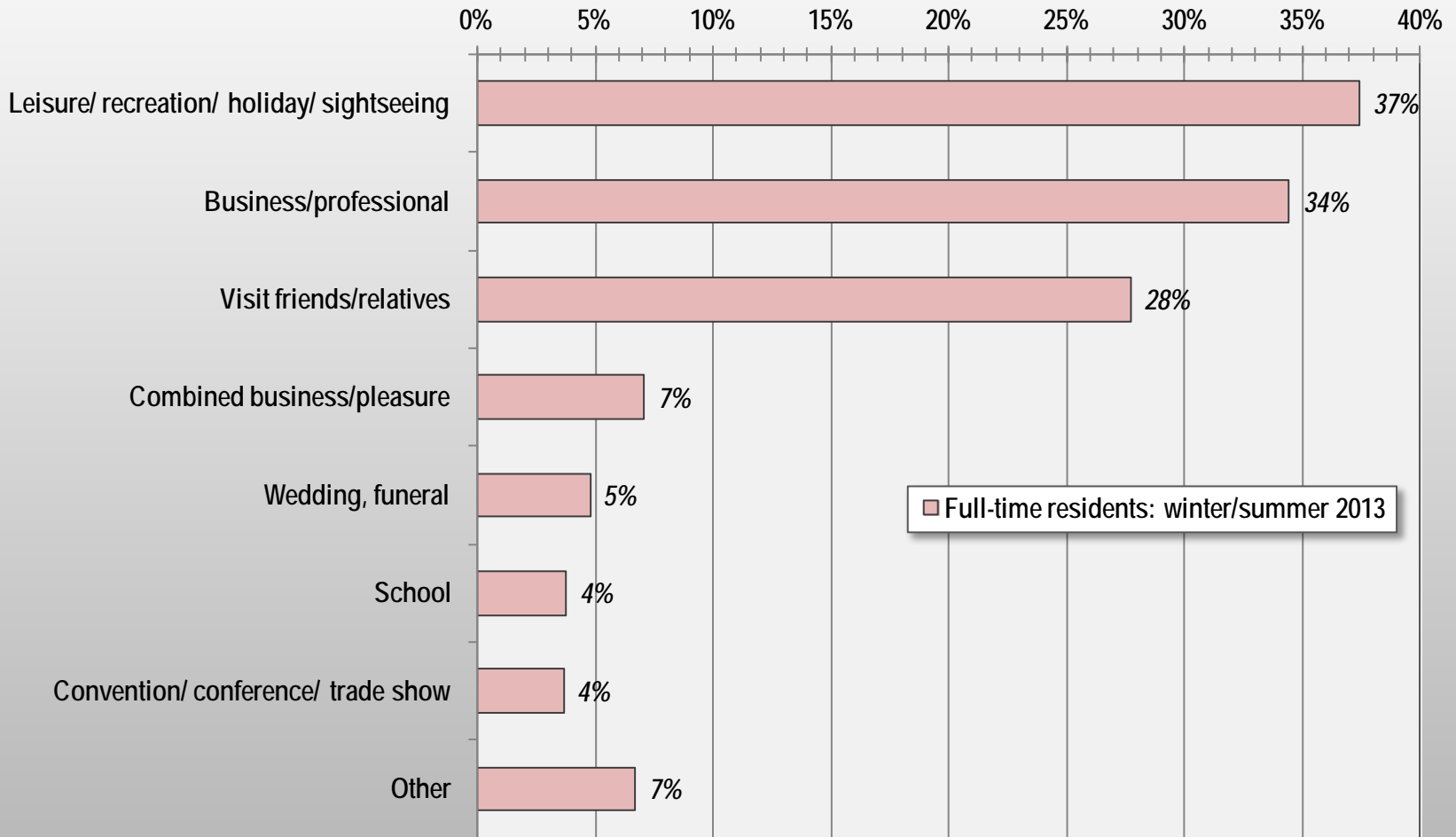


*Top competitors: Vail, Mammoth, Aspen, Whistler, Jackson Hole, Park City*

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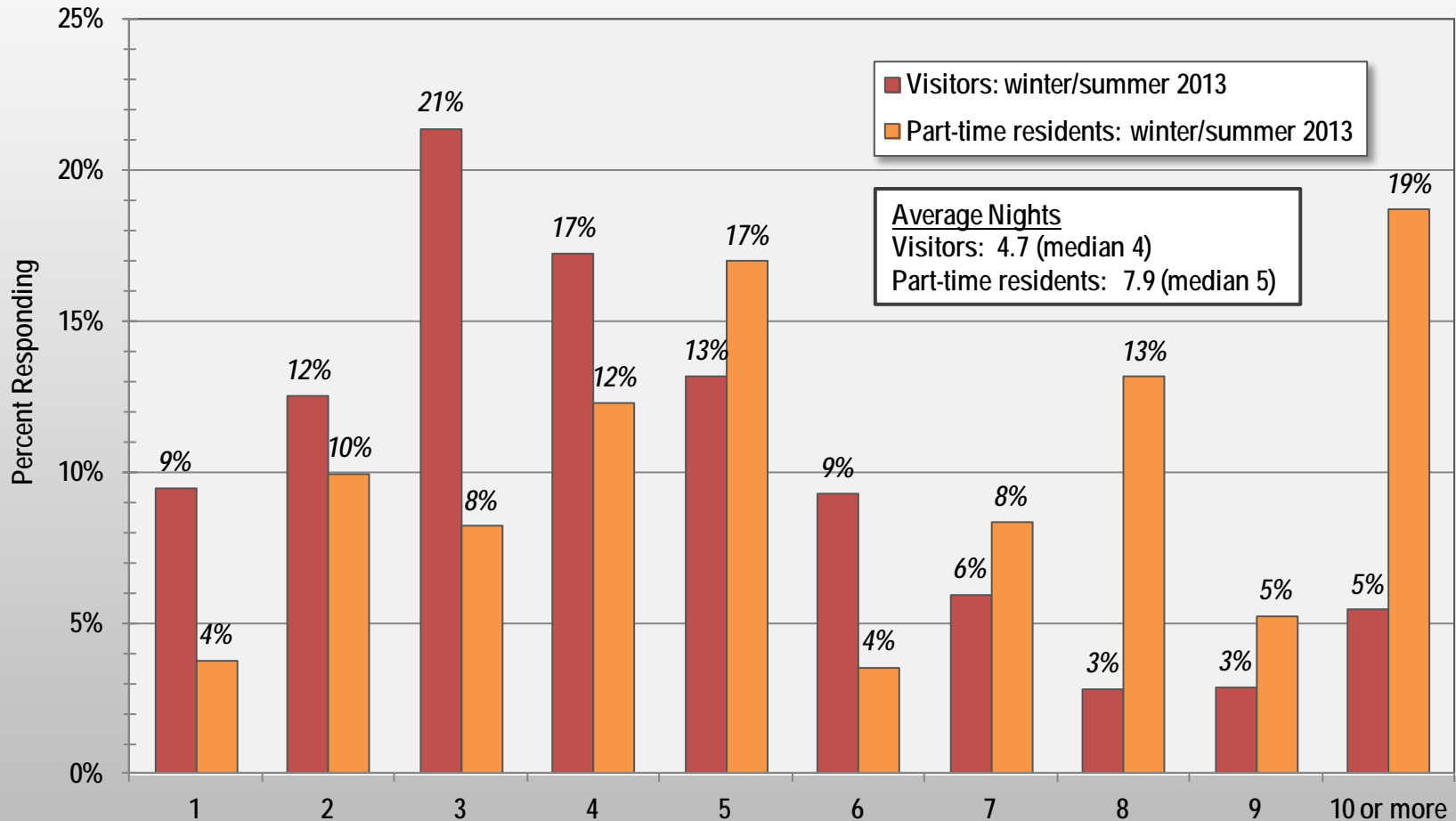
# Full Time Locals: Main Trip Purpose



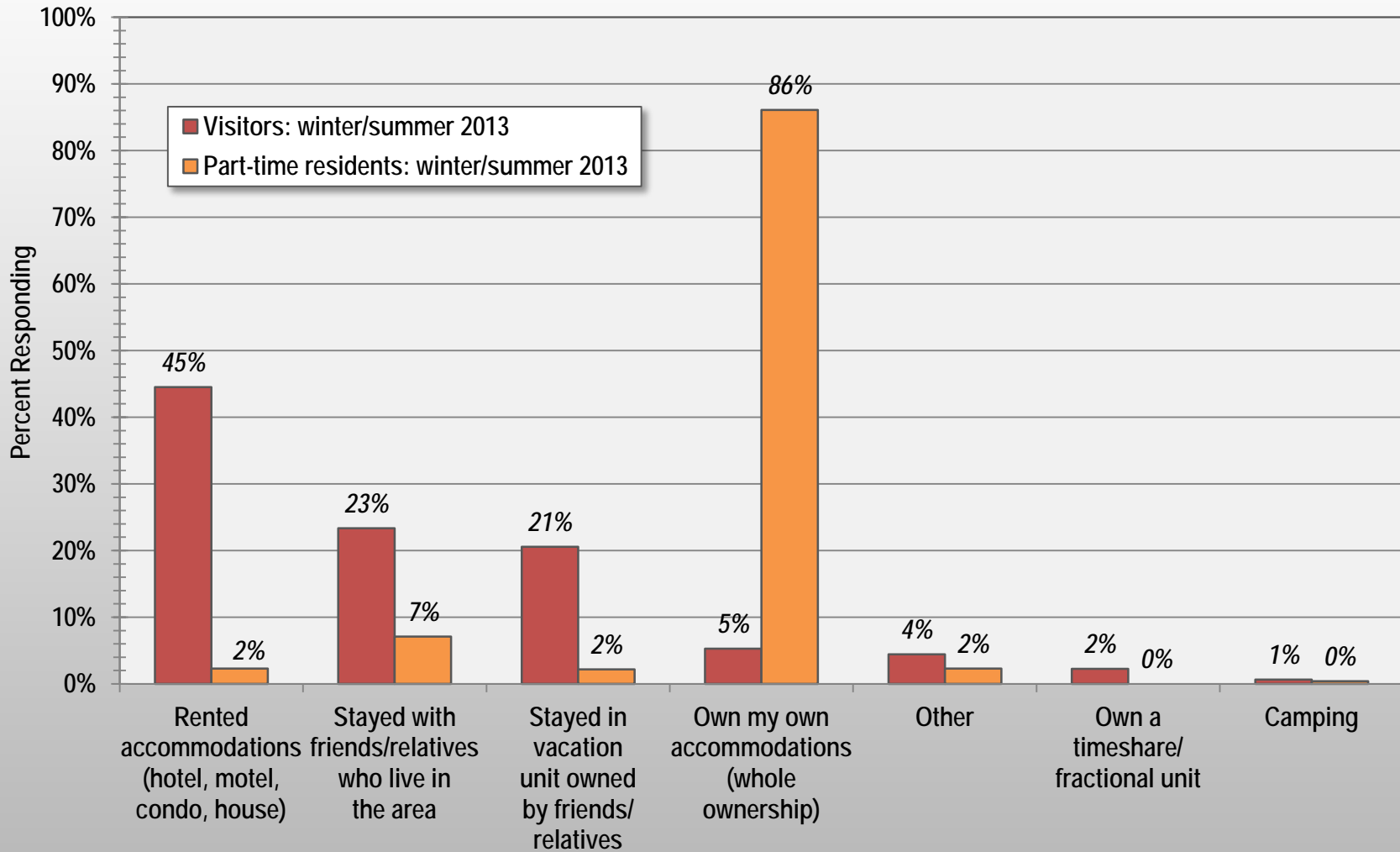
*Top 3 purposes: leisure, business, visit friends/family*



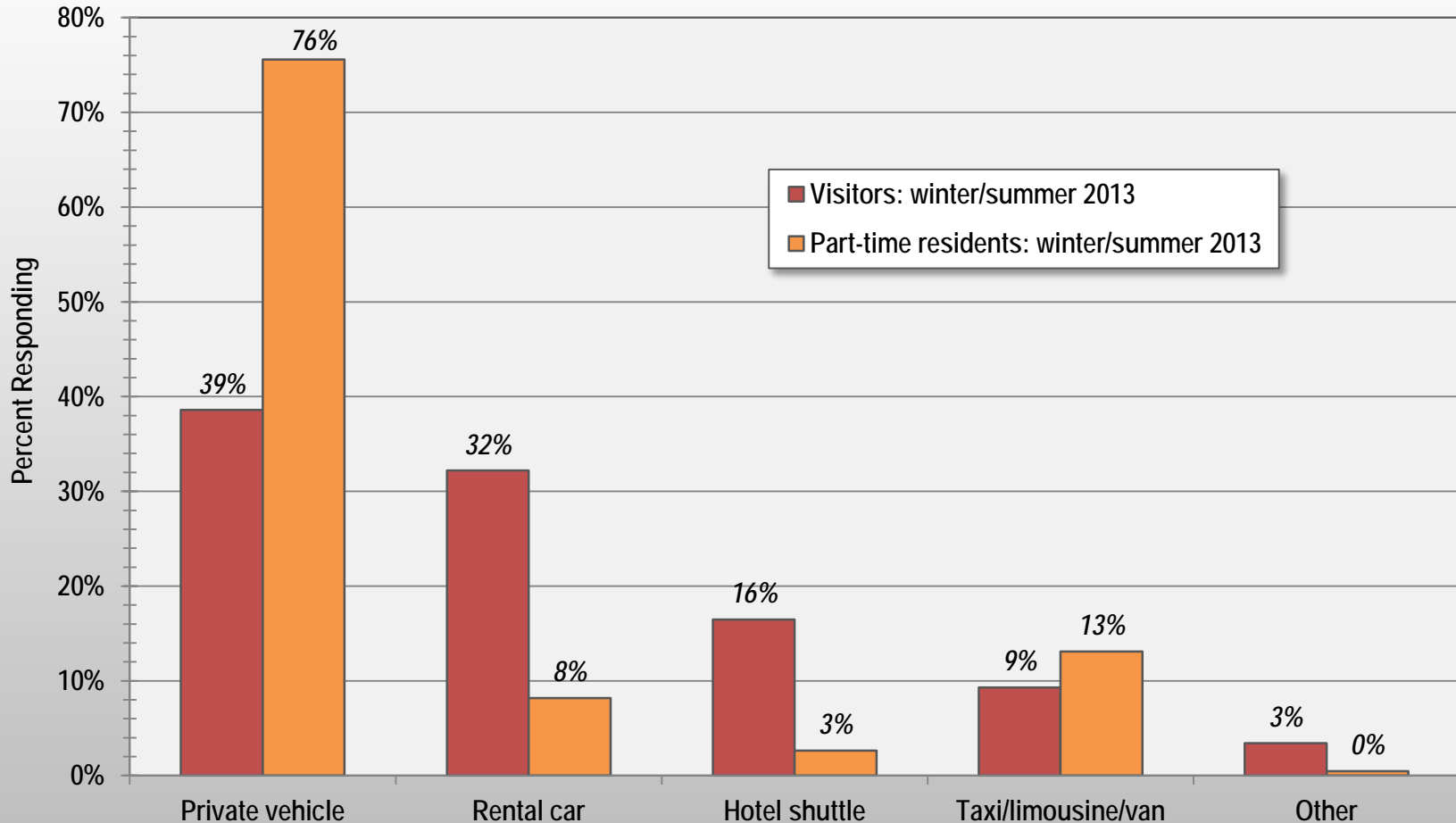
# Trip Nights



# Accommodations Type



# Transportation to Airport



# Average Per Capita Daily Expenditures

	Visitors: winter/summer 2013	PT residents: winter/summer 2013
Restaurants/food and beverage	\$97	\$94
Recreation	\$63	\$64
Lodging	\$61	\$4
Shopping/retail purchases	\$52	\$61
Local transportation	\$25	\$6
Entertainment/amusement	\$7	\$17
Sightseeing	\$2	\$1
Other (incidentals, tips, sundries)	\$20	\$20
<b>TOTAL</b>	<b>\$328</b>	<b>\$267</b>

# Economic Impact of Visitors & PT Residents (2<sup>nd</sup> Homeowners)

## VISITORS

average length of stay: 4.7 nights

average per person per day spend: \$328

total estimated visitors: 28,589 (56% of annual passenger 2012 enplanements of 50,692)

**TOTAL Visitor Estimated Annual Direct Spend: \$44M**

*Each visitor spends \$1542 during a visit*

## PART-TIME RESIDENTS (2<sup>ND</sup> HOMEOWNERS)

average stay: 7.9 nights

average per person per day spend: \$267

total estimated visitors: 7,992 (16% of annual passenger 2012 enplanements of 50,692)

**TOTAL PT Resident Estimated Annual Direct Spend: \$17M**

*Each PT Resident spends \$2120 during a visit*

**TOTAL VISITOR & PT RESIDENT Estimated Annual Direct Spend:  
\$61 MILLION**

# Economic Impact of New Visitors

## NEW VISITORS

average length of stay: 4.0 nights

average per person per day spend: \$330

total estimated visitors: 9,663 (34% of estimated annual visitor passengers of 28,589)

**TOTAL New Visitor Estimated Annual Direct Spend: \$12.7M**

*Each new visitor spends \$1320 during a visit*

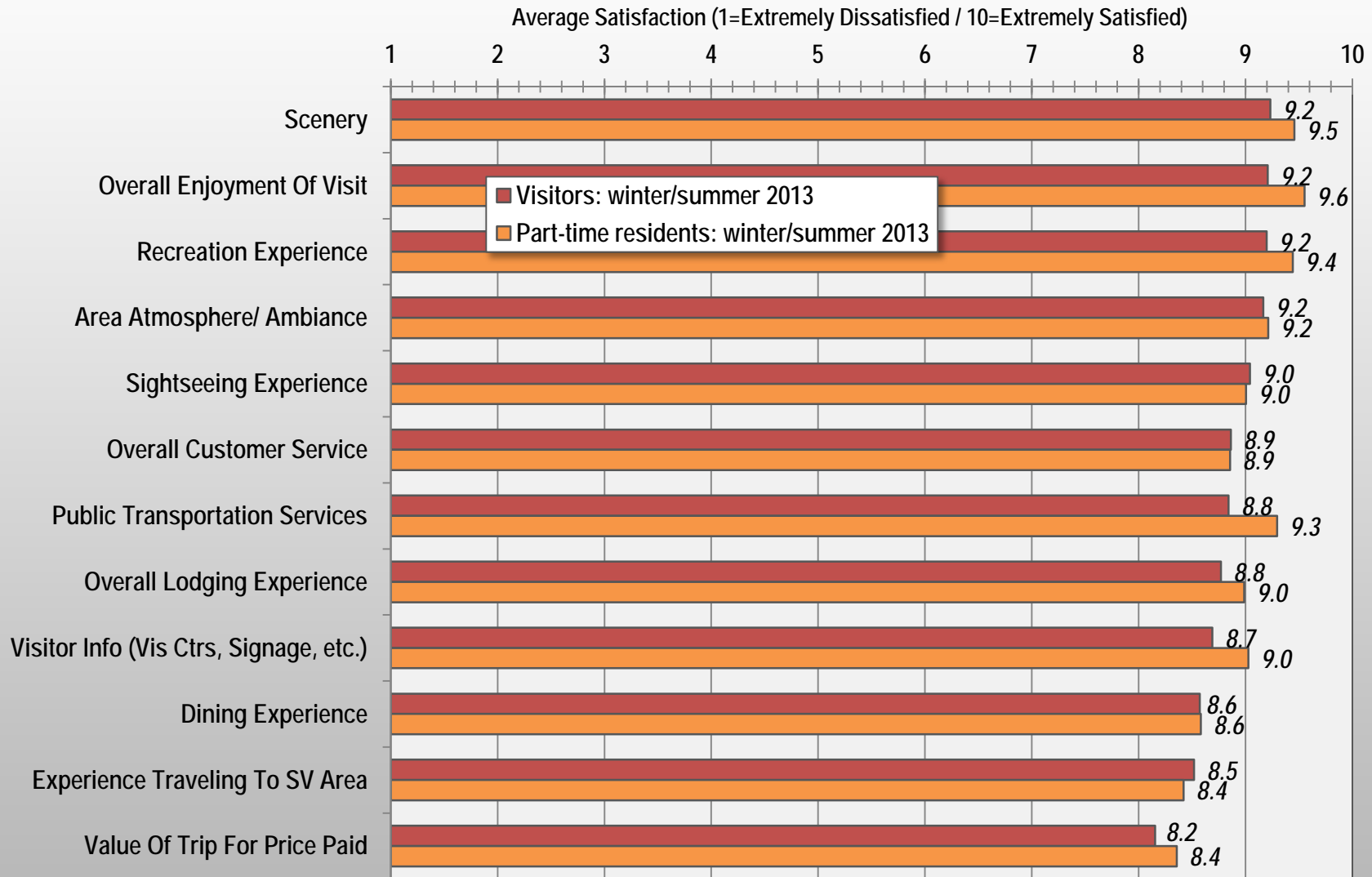
## NEW VISITORS

- 76% said flight access to SUN was very-extremely important factor in their decision to visit.
- Top main purpose for visit was business/conference/seminar; followed by leisure/recreation, visiting friends/family
- 62% stayed in rental accommodations
- 93% had a very-extremely high overall enjoyment of trip to Sun Valley

# Outline

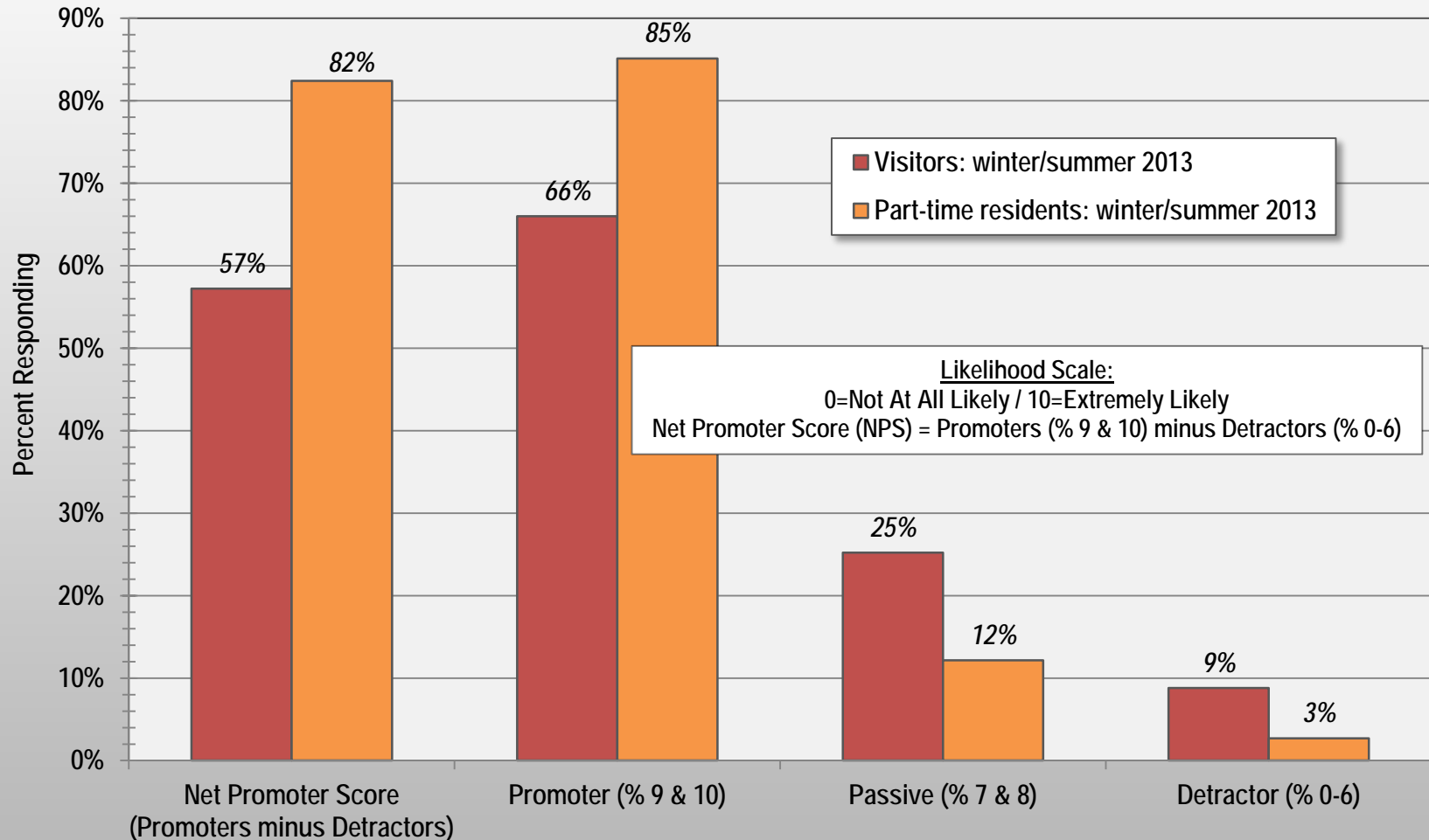
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# Satisfaction with Stay in Sun Valley Area





# Likelihood of Recommending SV as a Travel Destination (Net Promoter Score)



# Strengths of SV vs. Other Mtn Resorts

- Atmosphere/ambiance
- Customer experience
- Friendly people
- Lack of crowding
- Restaurants/shopping/culture
- Scenery/beauty
- Ski experience (winter)
- Ease of access
- Weather

# Weaknesses of SV vs. Other Mtn Resorts

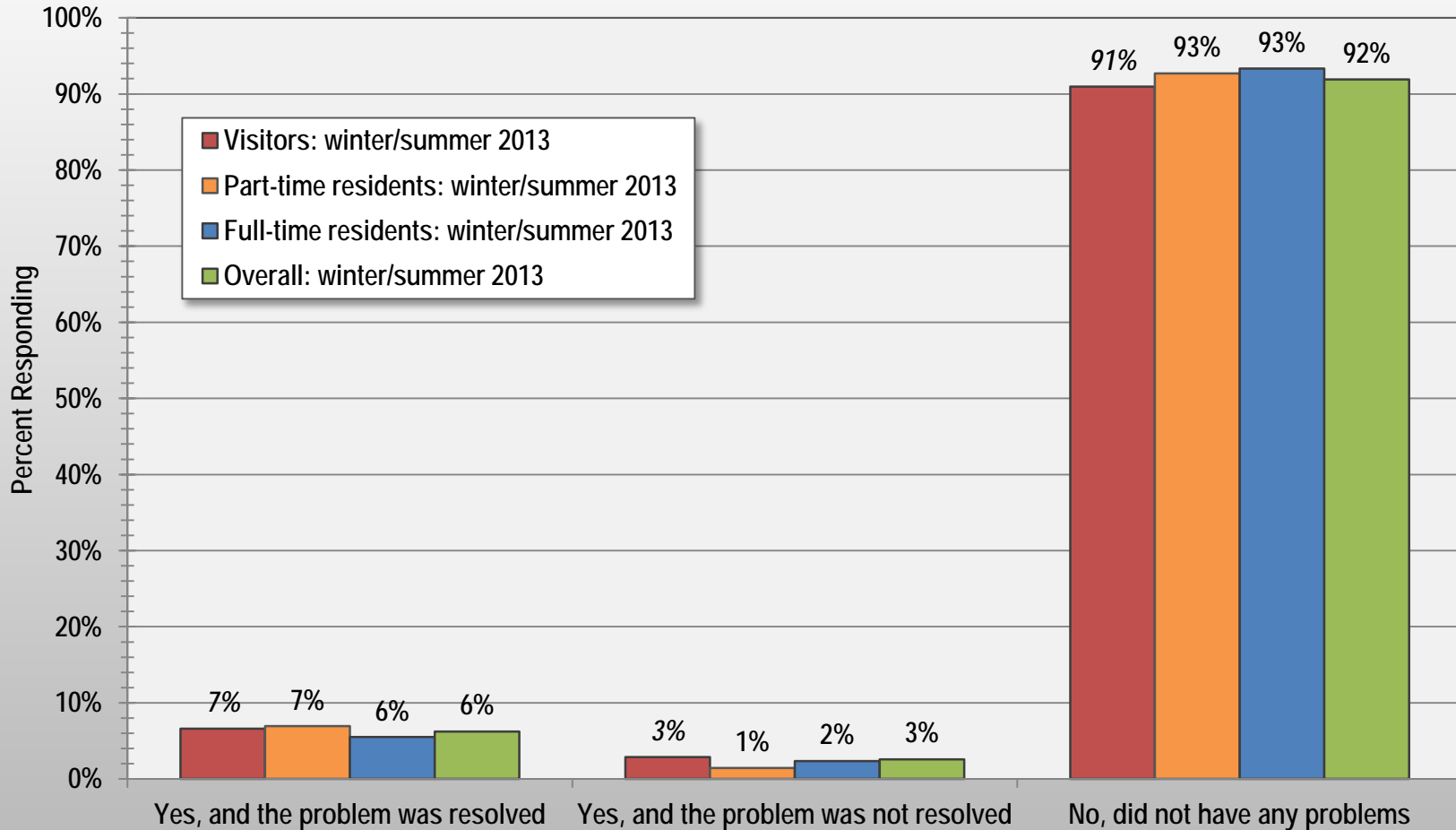
- Remote/difficult to get to
- Expensive
- Other:
  - Lack of restaurant/shopping options
  - Limited nightlife
  - Older/richer demographics
  - Poor customer service
  - Poor snow (winter)

# Satisfaction w/ Airport & Flight SVC to SUN

Average Satisfaction (1=Extremely Dissatisfied / 10=Extremely Satisfied)



# Did you experience any problems at the Airport today?



# Suggestions for improving SUN airport/flights

- Add more daily flights
- Improve flight connections
- Provide more direct flights to more cities
- Improve bad weather capabilities/reduce delays
- Add more comfortable terminal seating
- More terminal restaurant/bar options
- Reduce flight costs
- Bigger planes

# Changes in Visitor Profile: Winter/summer 2013 vs. 2010/11

## TRAVELERS & TRAVEL PATTERNS

- More passengers from NYC (+4 ppts), less from Portland (-4ppts)
- Increased share traveling with family/children/relatives (+4 ppts),
- Longer flight booking lead time (+7 ppts at least 2 calendar months in advance)
- More full-time local residents (+ 5 ppts) ; decrease in visitors (-4 ppts) and PT locals (-1 ppt)
- Decrease in new visitors to Sun Valley (-6 ppts)
  - Increase in summer repeat visitors (+7 ppts); increase in previous winter repeat (+2 ppts)
- Increased importance of SUN flights in decision to visit (+0.5 pts on 1-10 scale)
- Increase in \$200K+ income (+10 ppts),
- Increased share staying in owned vacation unit (+6 ppts),  
decreased share staying w/ friends/relatives who live in area (-8 ppts)
- Increase in per-person daily expenditures of visitors/PT residents (+18%, to \$315)
- Highly stable satisfaction w/ Sun Valley experience

# Changes in Visitor Profile: Winter/summer 2013 vs. 2010/11

## AIRPORT EXPERIENCE

- Airport rating increases:
  - Airport seating availability (+0.4 pt on 1-10 scale)
  - Airline employees (+0.3 pt)
  - Concession employees (+0.2 point)
- Airport rating decreases:
  - Flight convenience (-0.4 pt)
  - Availability of flights/seats on desired dates (-0.4 pt)
  - Overall airport experience (-0.3 pt)
  - Cost of ground transportation (-0.2 pt)



# Unique Aspects of SUN Passengers (vs. other mountain resorts)

## HOW OUR AIR TRAVELERS DIFFER

- Extremely strong Pacific coast focus
- Large part-time resident segment
- Older, affluent profile; high share of solo travelers
- Low share of first time visitors; higher share of repeat visitors
- Low share of visitors stay in rental lodging
- Low use of vacation travel packages; shorter length of stay
- High share of travel for business, visiting family/friends
- High share using private cars vs rental cars
- High restaurant/F&B spend
- Top-tier mountain resort competitors to Sun Valley:  
Whistler, Vail, Park City, Aspen, Jackson Hole West coast: Mammoth, Tahoe

# SUMMARY

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- 72% Visitors/PT Residents, 28% Locals

- **ECONOMIC IMPACT** (of SUN Visitors/PT Resident Passengers):

- \$61 Million annually in Direct Spending

- **75% of visitors/PT residents said SUN was very-extremely important factor in their decision to visit.**

- **HOW TO IMPROVE SUN?**

- Add more flights, reduce diversions, lower fares



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# **THANK YOU!**

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