



# **Friedman Memorial Airport Passenger Survey: 2014 Annual Results**



**Prepared for: Fly Sun Valley Alliance**  
**Prepared by: RRC Associates**

**November 2014**

# Outline

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

# Methodology

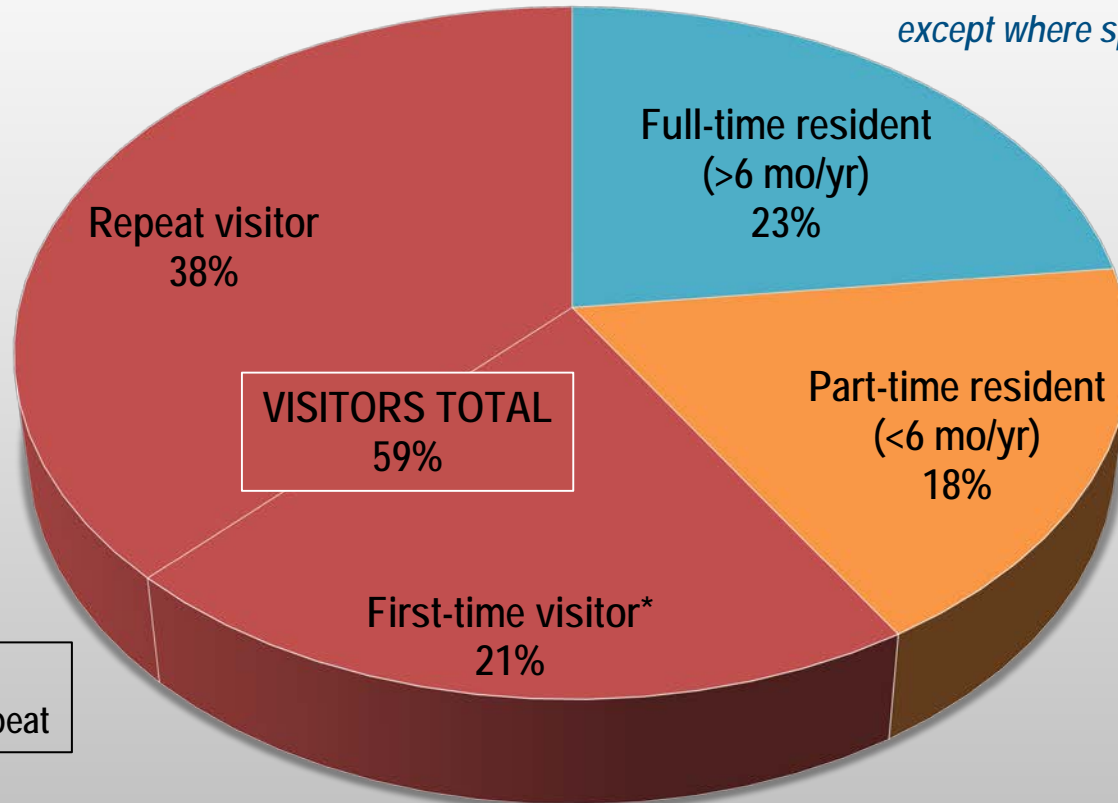
- Intercept survey conducted in passenger waiting area at SUN
- 2,065 survey completes in Dec-Apr 2013/14 and Jul-Oct 2014
  - 95% confidence interval +/-2.2% (larger for subgroups)
- Sampling plan designed to capture representative passenger mix by flight
  - Results weighted to be representative of actual flight mix
- Most survey questions focus on visitor experience (but locals surveyed too)
  - Presentation focuses on results for visitors and part-time locals

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- **Visitor Demographics**
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# Resident - Visitor Mix

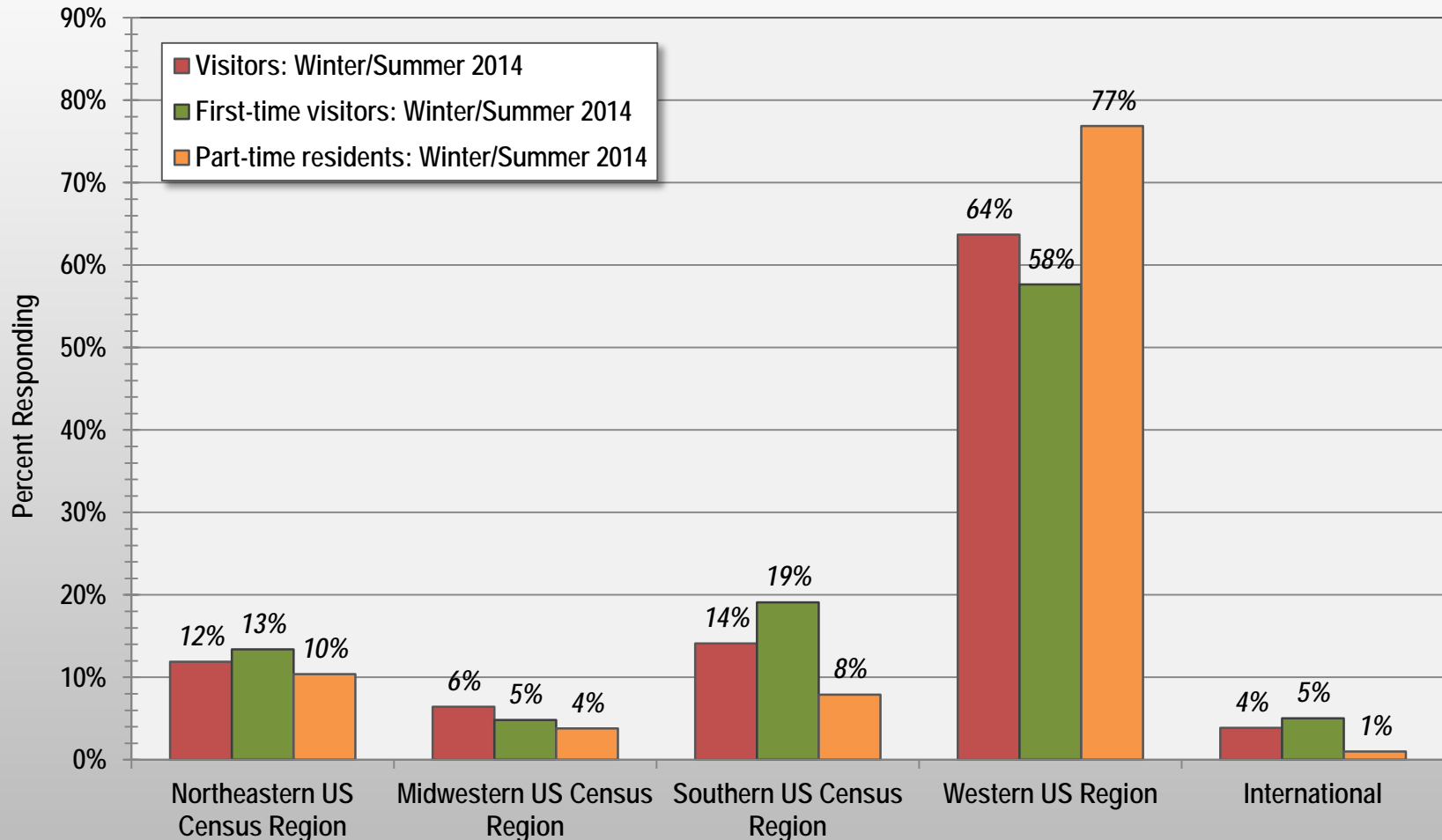
*FT locals excluded from remainder of this presentation, except where specifically noted.*



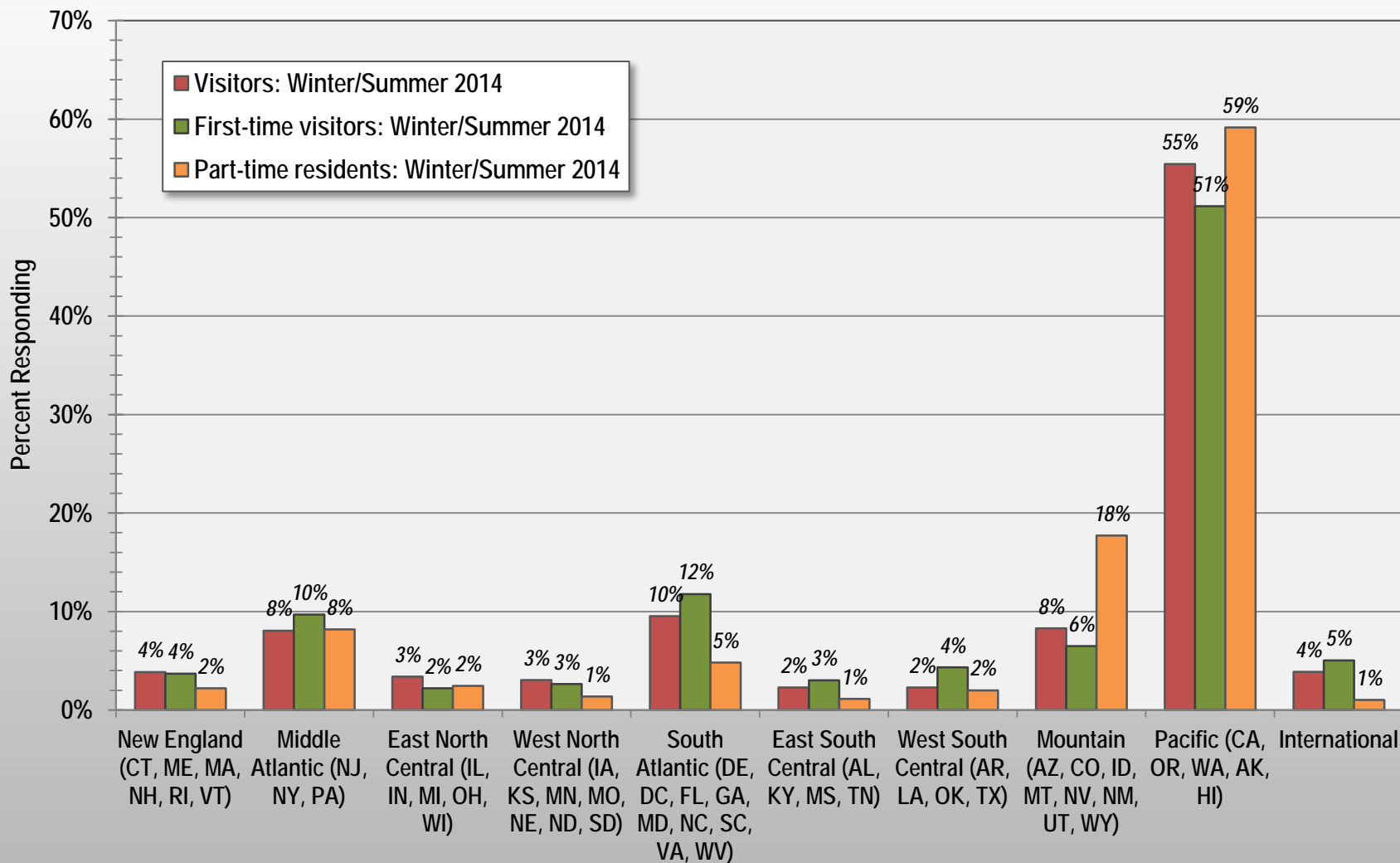
Among visitors:  
36% are first-time, 64% repeat

\*First time visitors = no previous visits to SV in past 5 winters or summers.  
Note: Full-time resident = live in area more than 6 mo/yr.  
Part-time resident = live in area less than 6 mo/yr.

# Visitor Origin by US Census Region

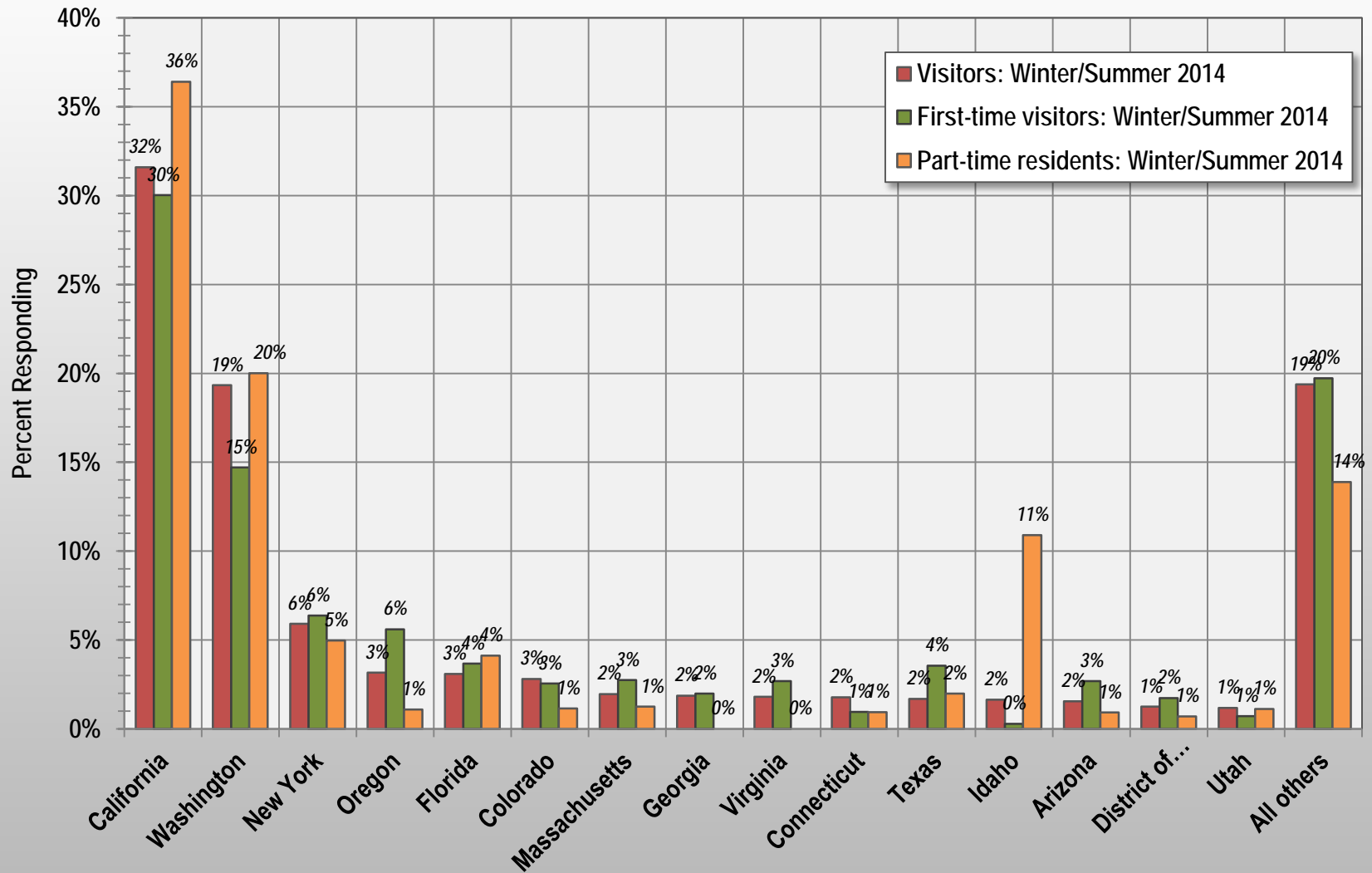


# Visitor Origin by US Census Division



- A majority of visitors (55%) and PT residents (59%) live in Pacific states.
- Many PT residents also live in Mountain states (18%), incl. 11% with local area zip.
- Other visitors / PT residents are widely dispersed.

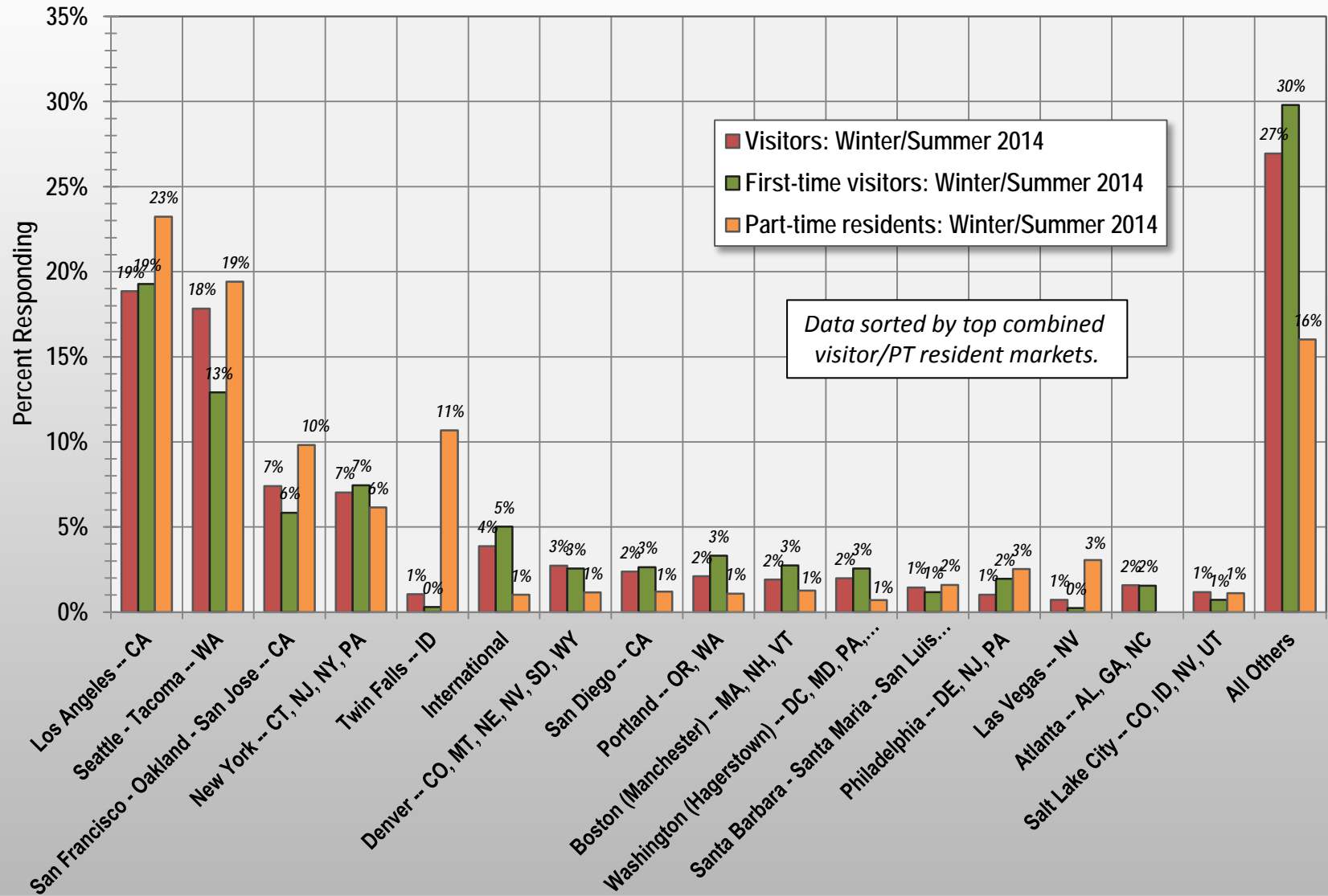
# Top States/ Countries



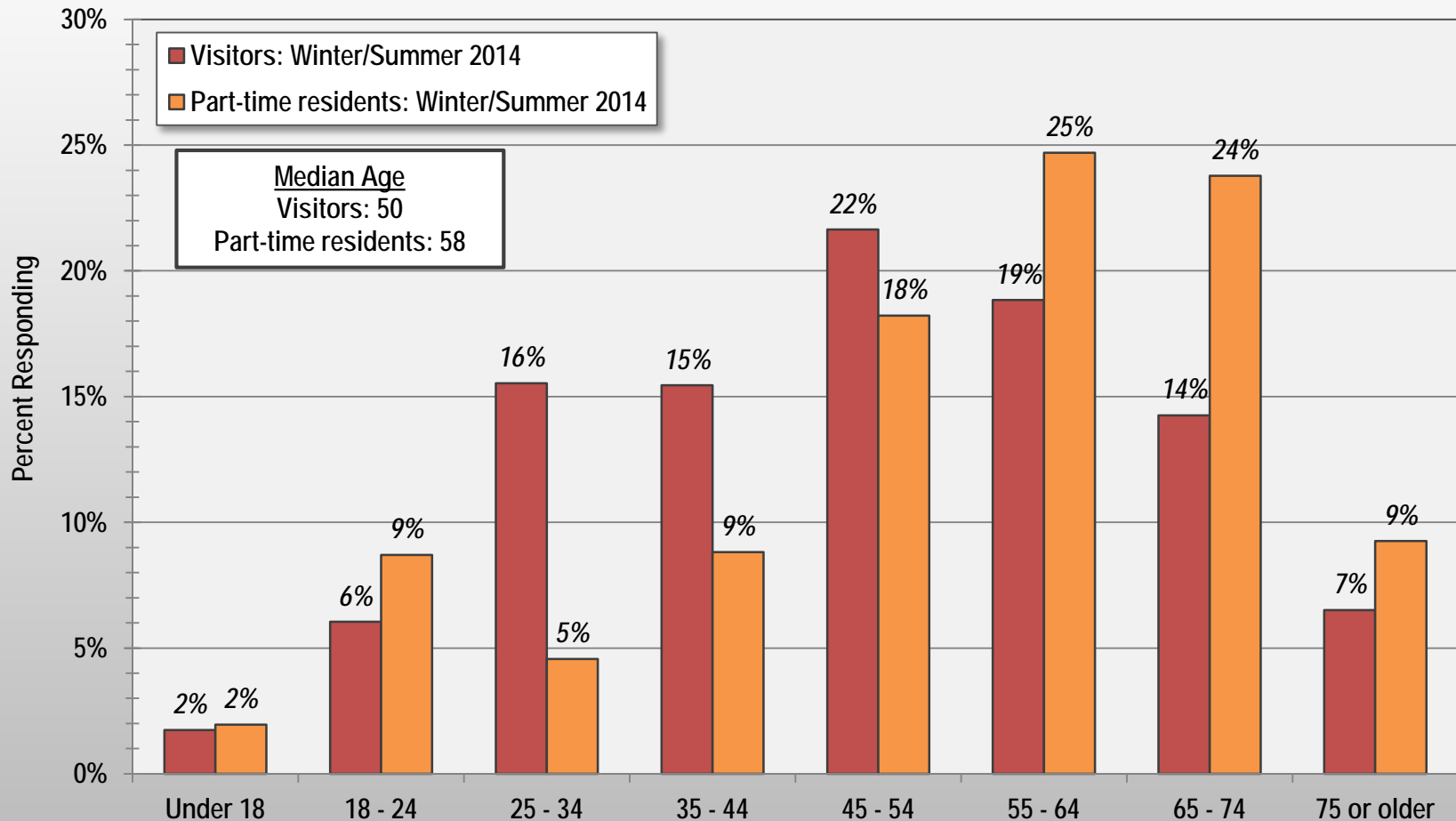
- CA (32-36%) is the clear leader, and WA (19-20%) is a strong second.
- Other markets widely dispersed, led by NY (6% of visitors) & OR / FL / CO (3% each).
- ID significant for PT residents (many provided local Sun Valley zip).



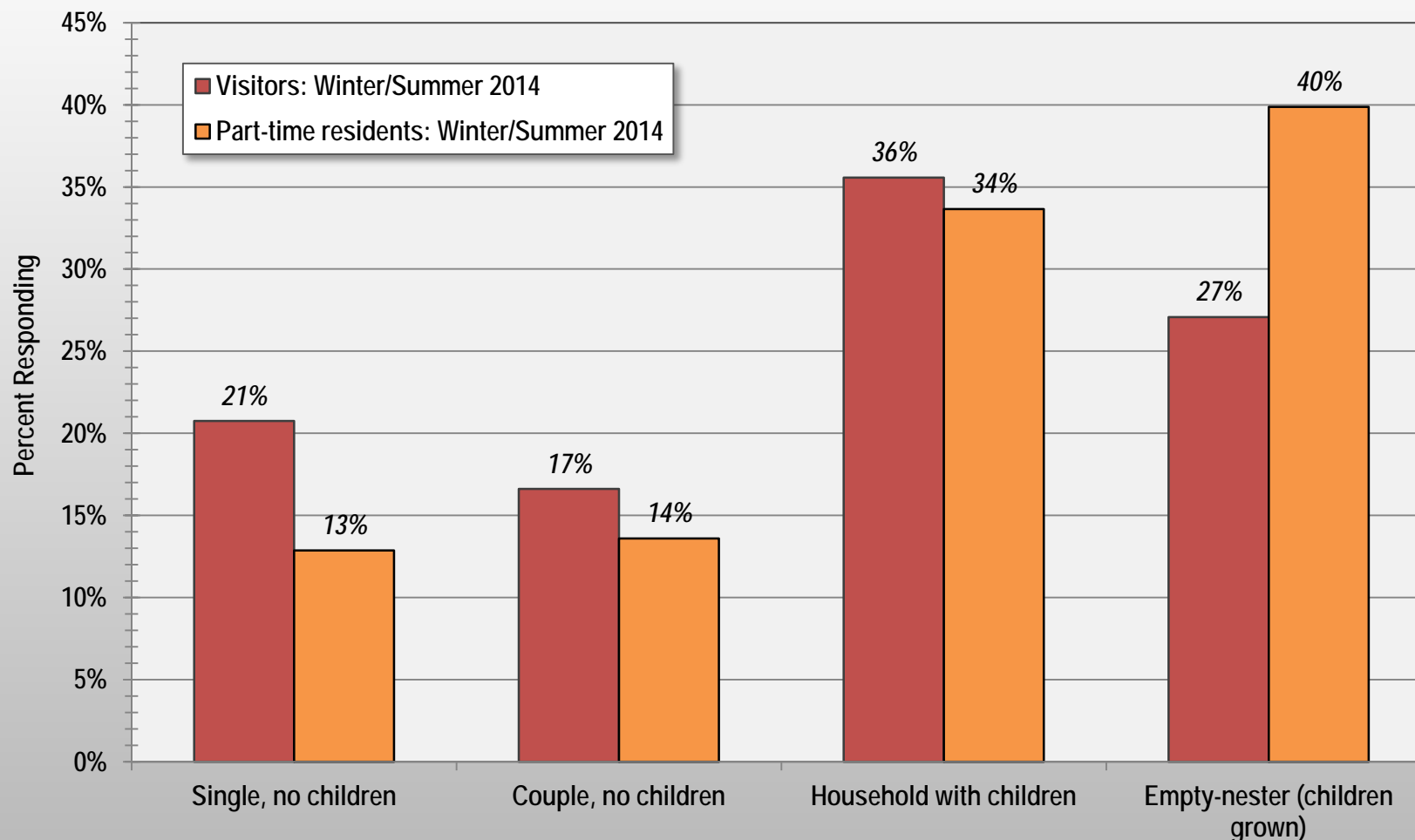
# Top Designated Market Areas



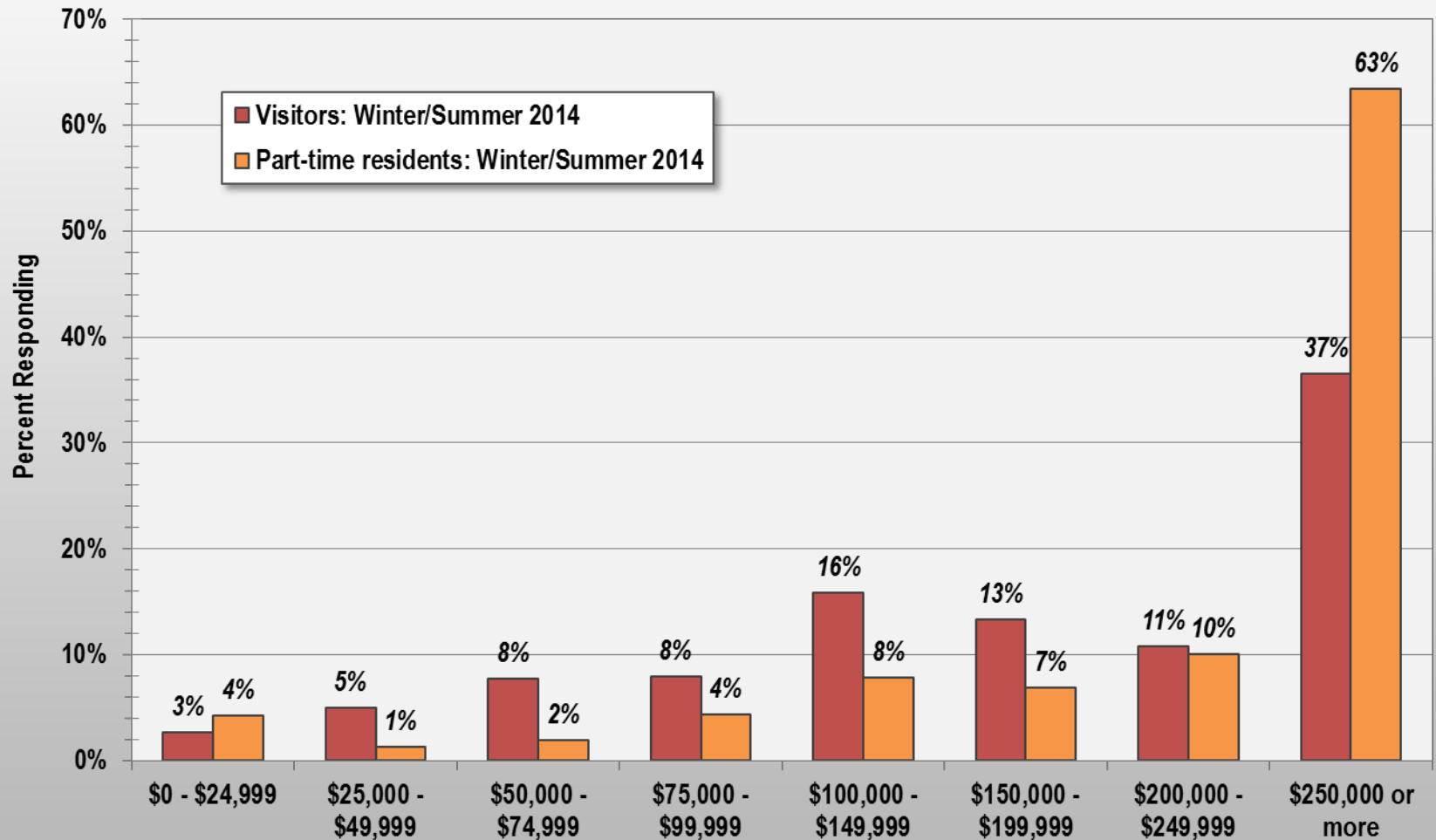
# Age



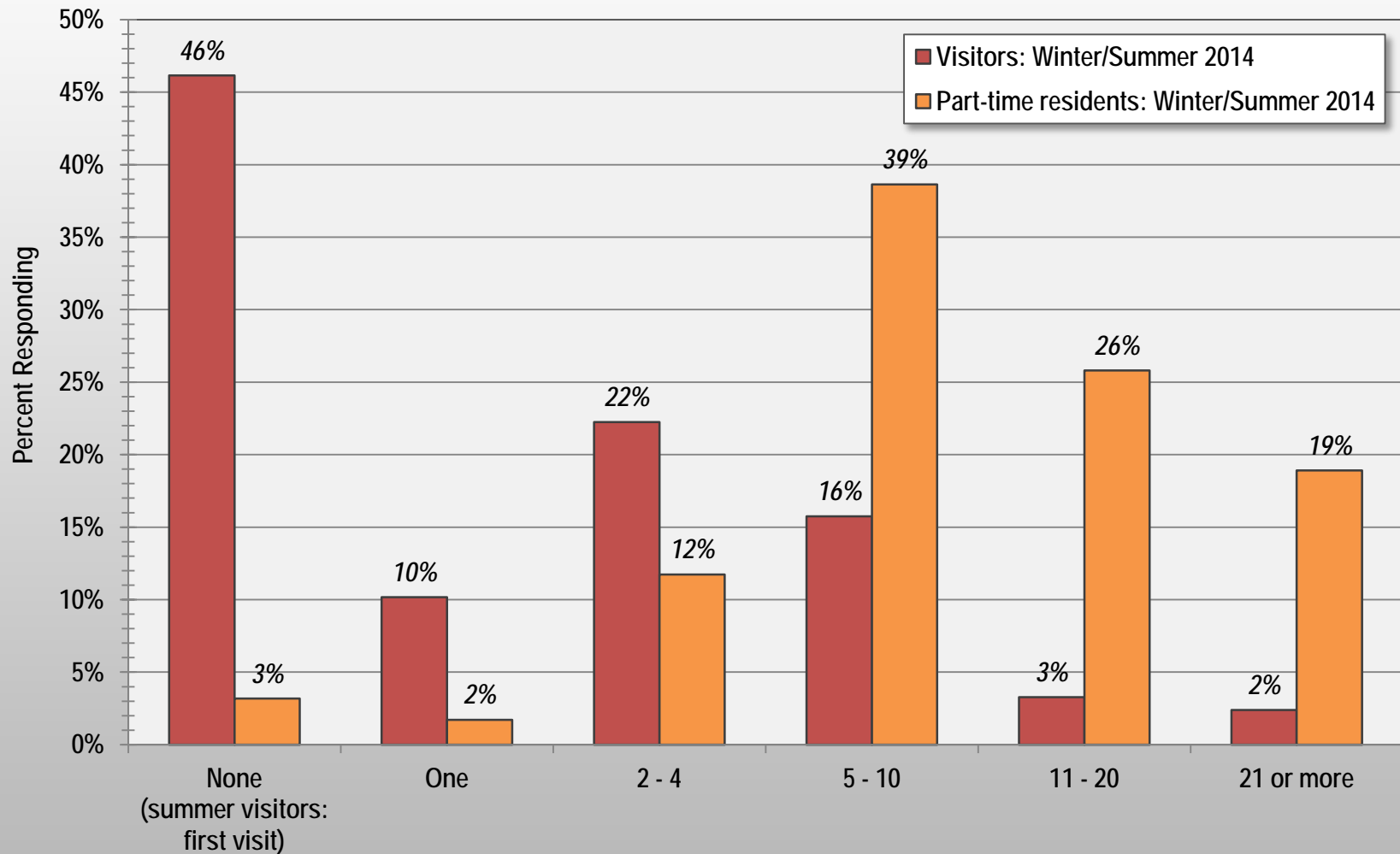
# Household/ family status



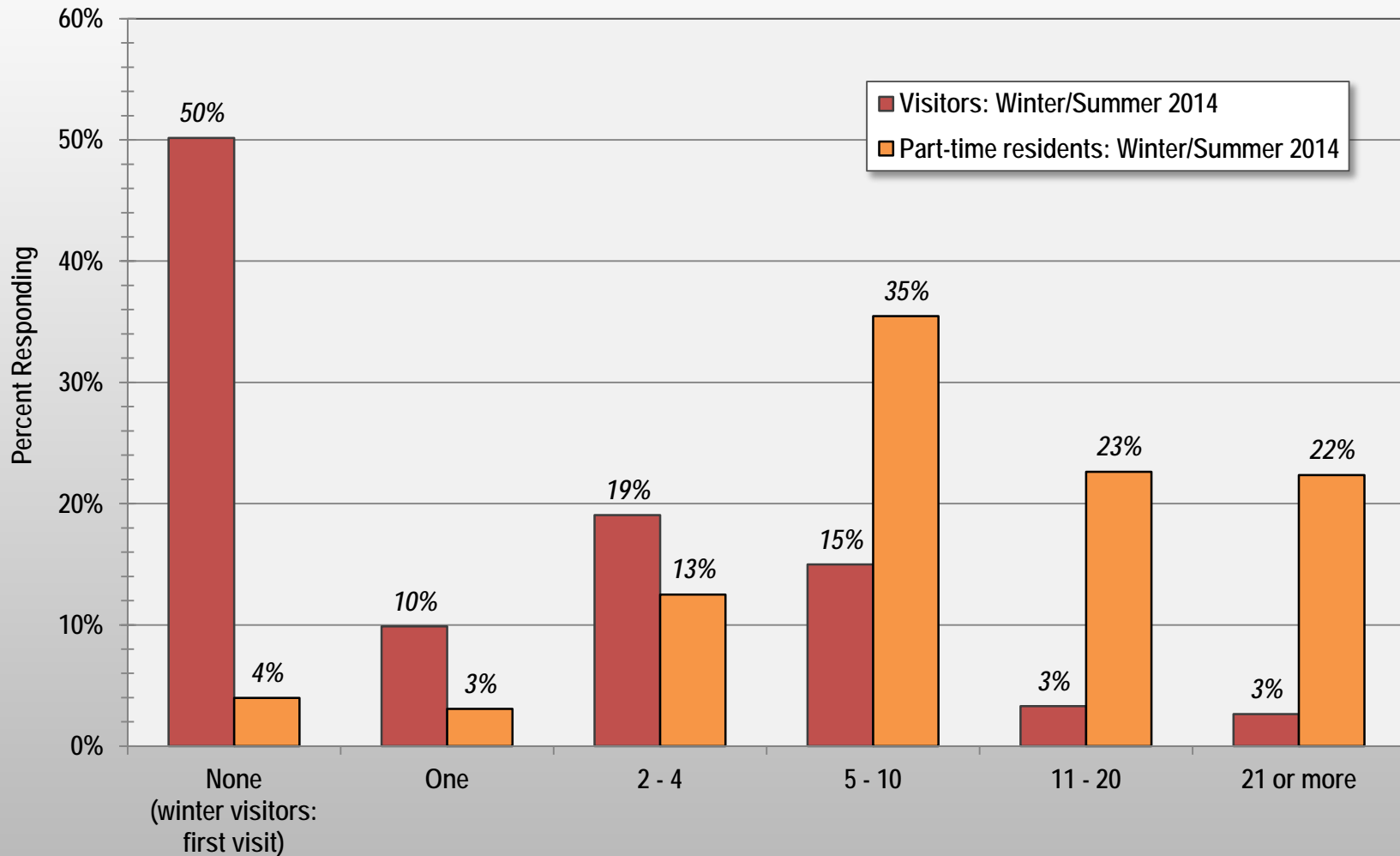
# HH Income (before taxes)



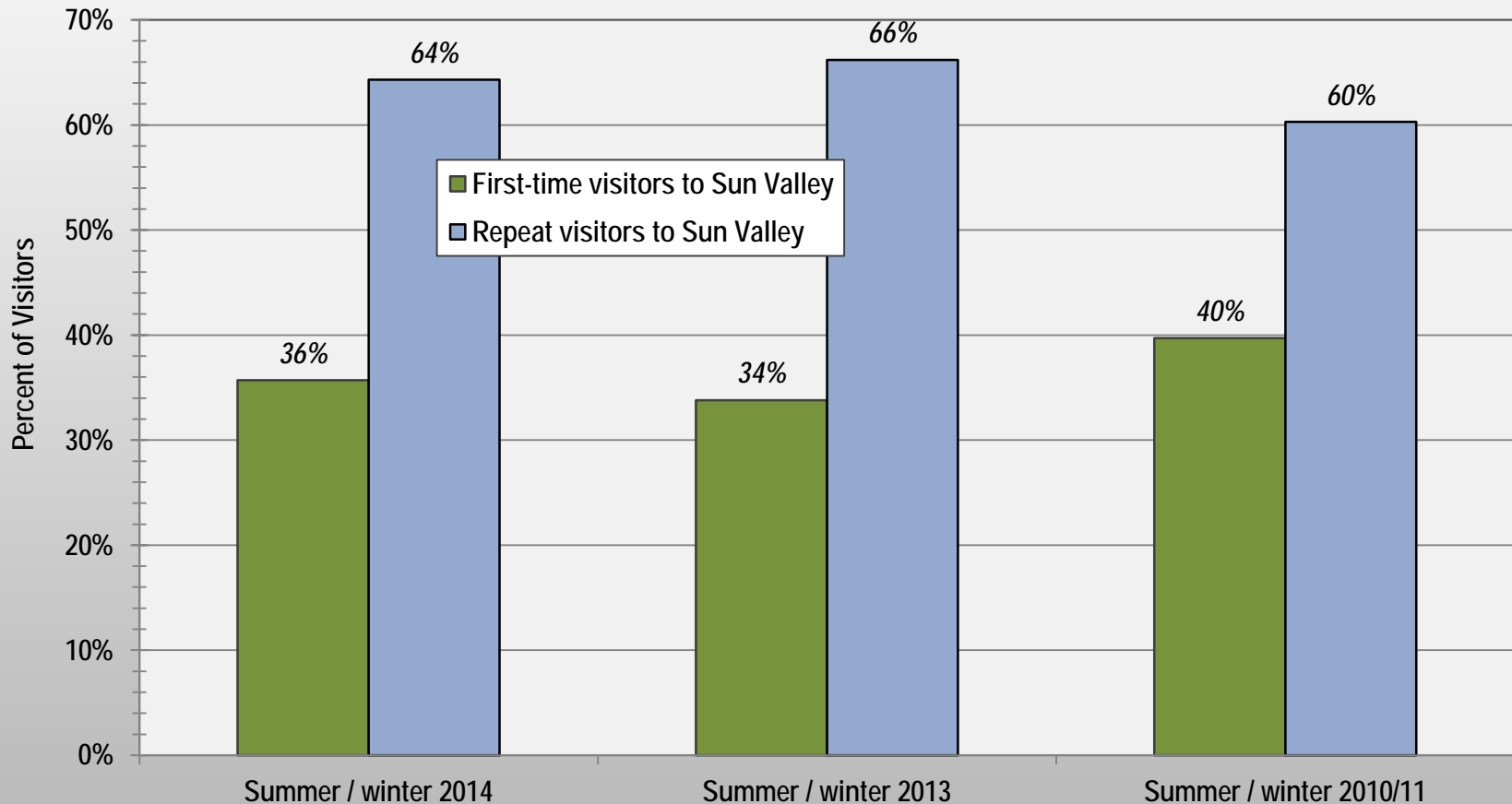
# Previous Summer Visits in Past 5 Years



# Previous Winter Visits in Past 5 Years



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



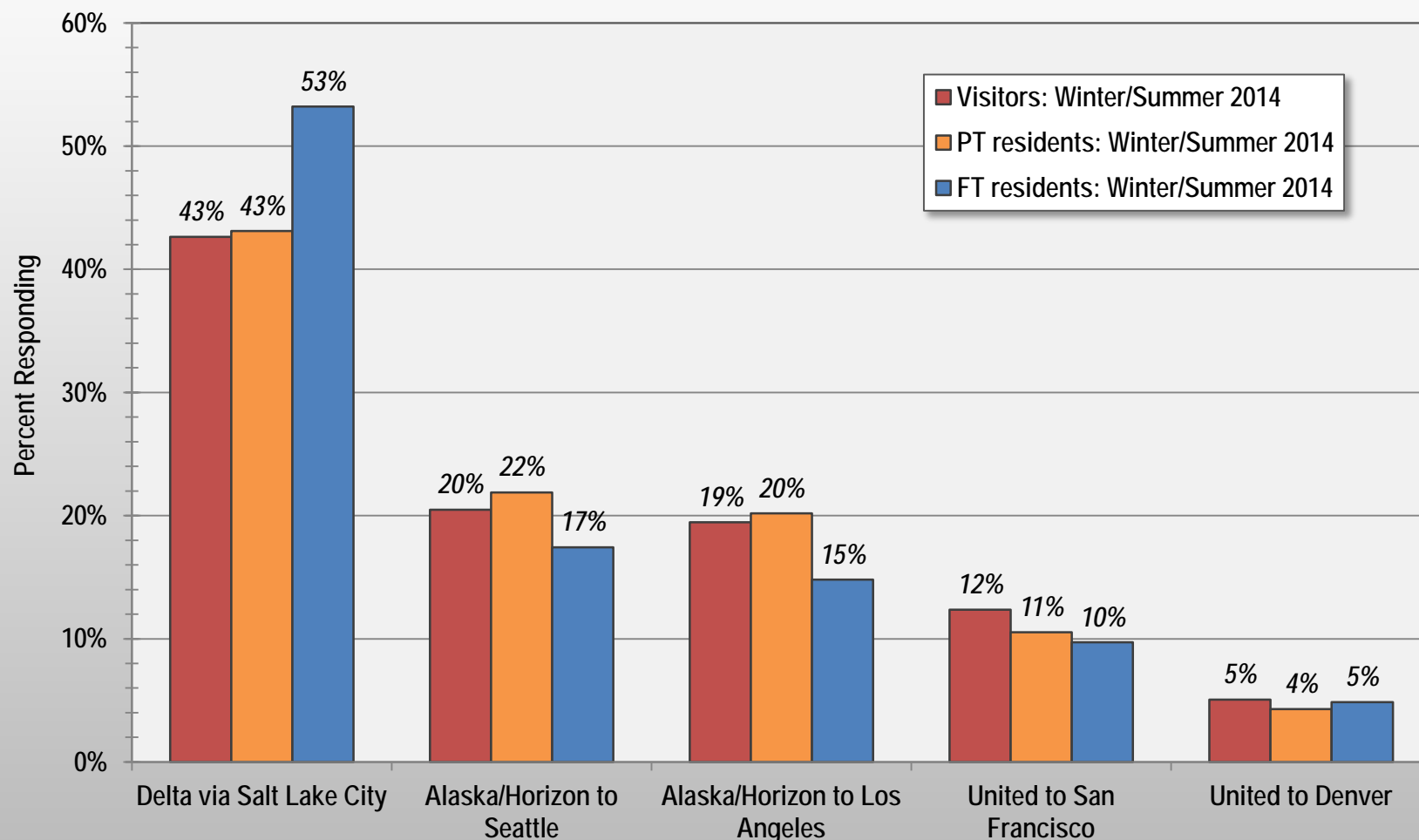
*Share of visitors coming to SV for the first time ticked up in 2014 (36%) from 2013 (34%).*

# Outline

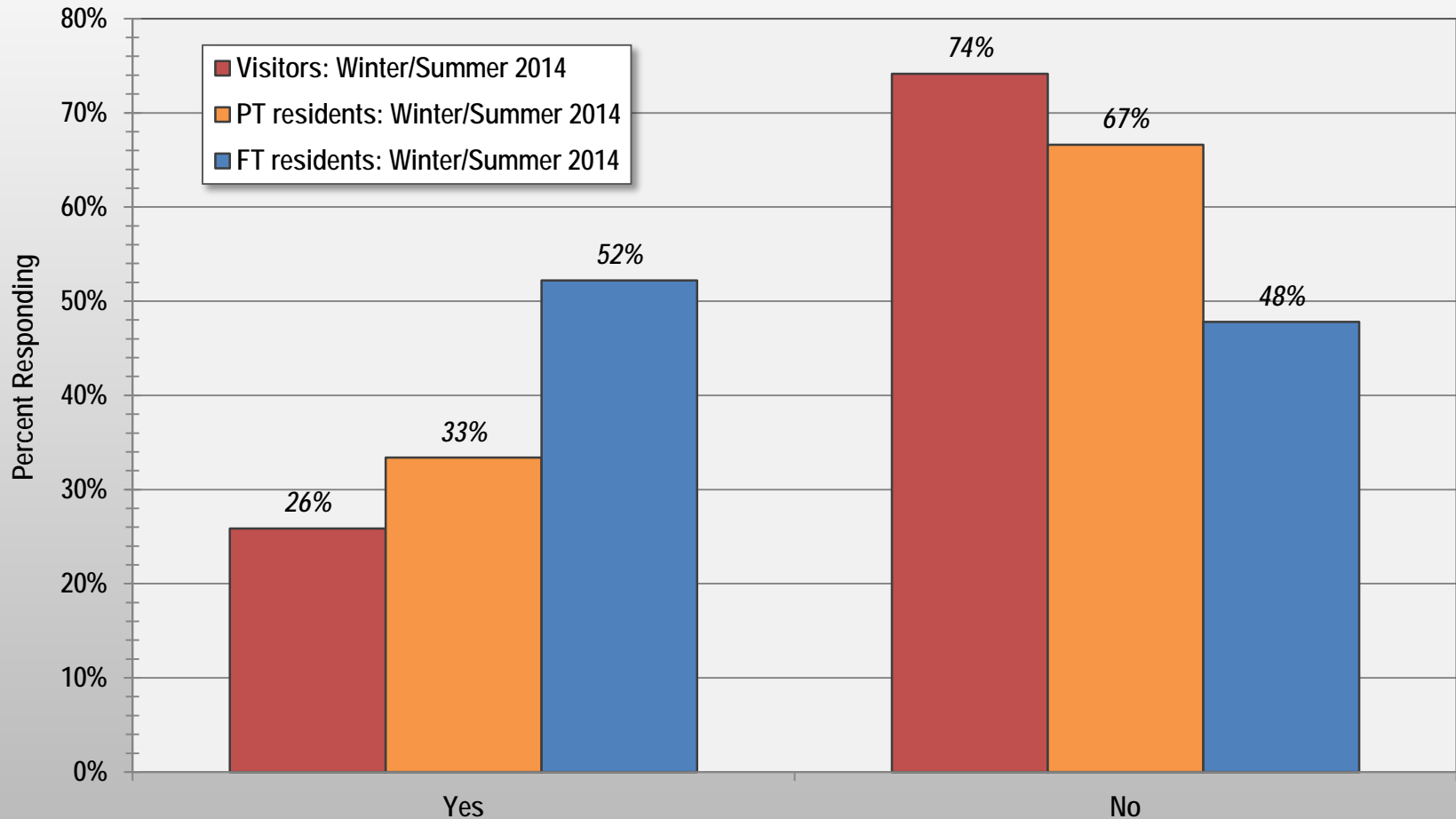
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- **Trip Planning**
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# On which flight are you departing today?

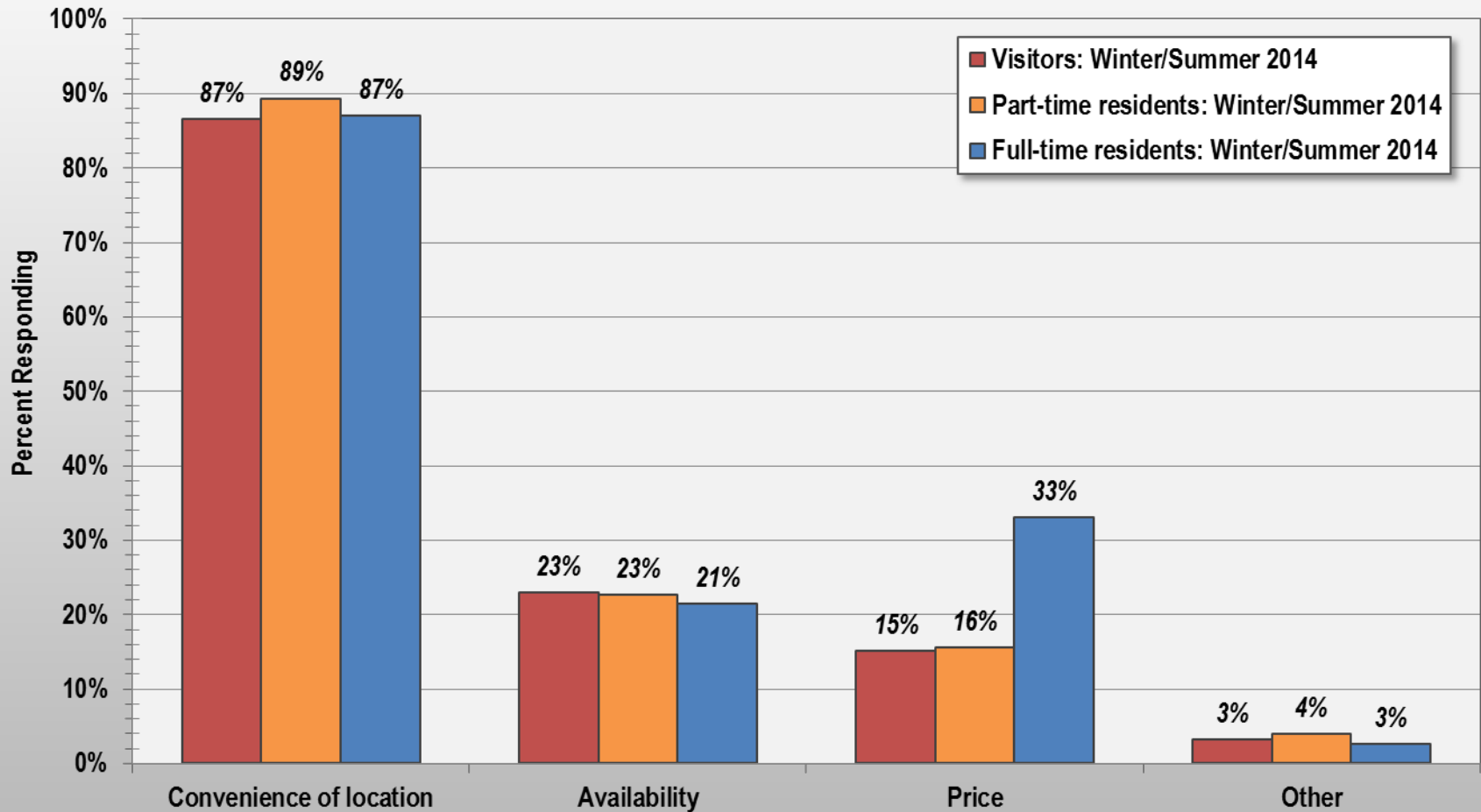


# Did you consider other airports for this trip?

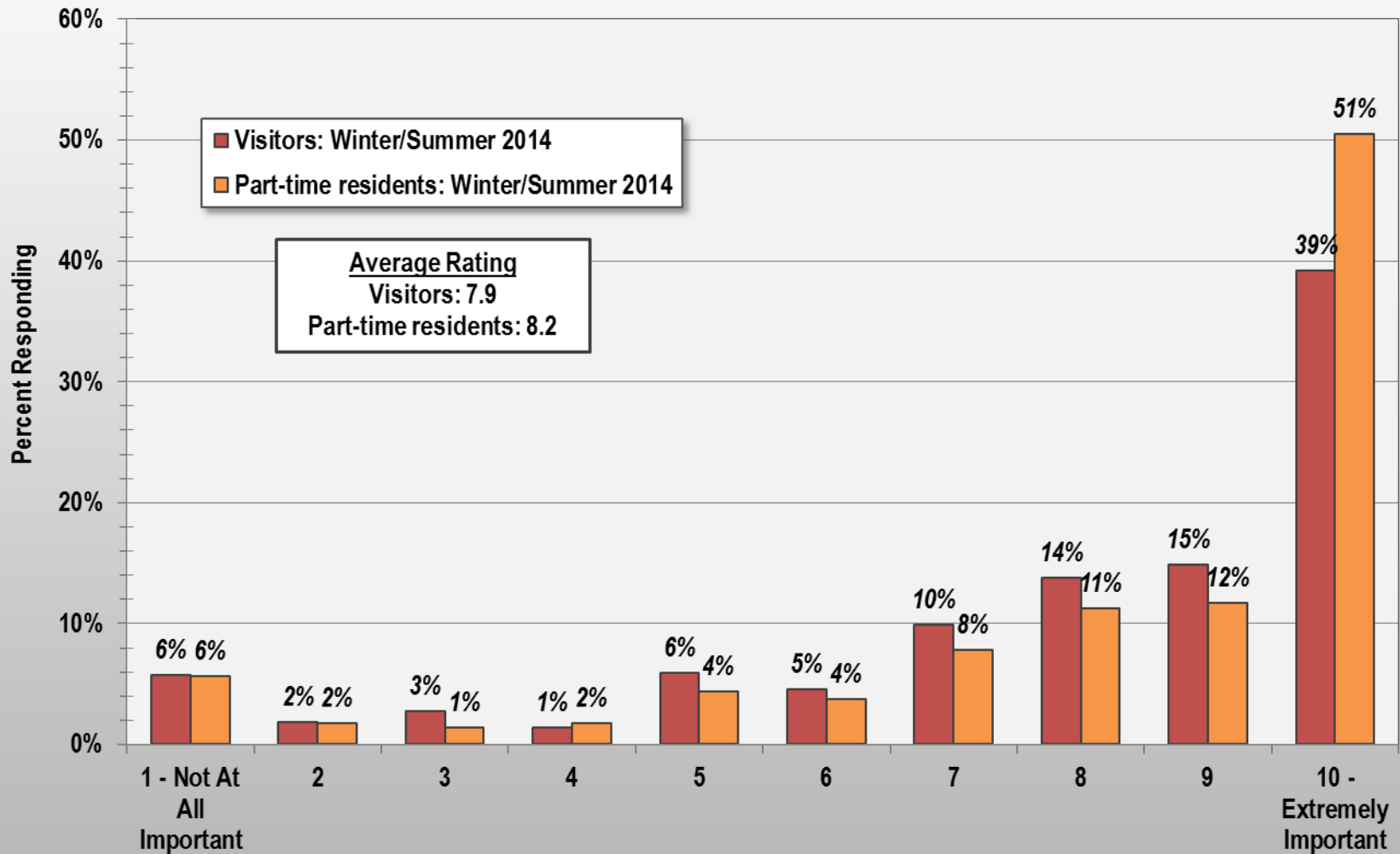


*FT residents were more likely to consider alternative airports (52%) than PT residents (33%) and visitors (26%). Boise was the top alternative considered, followed by Twin Falls and SLC.*

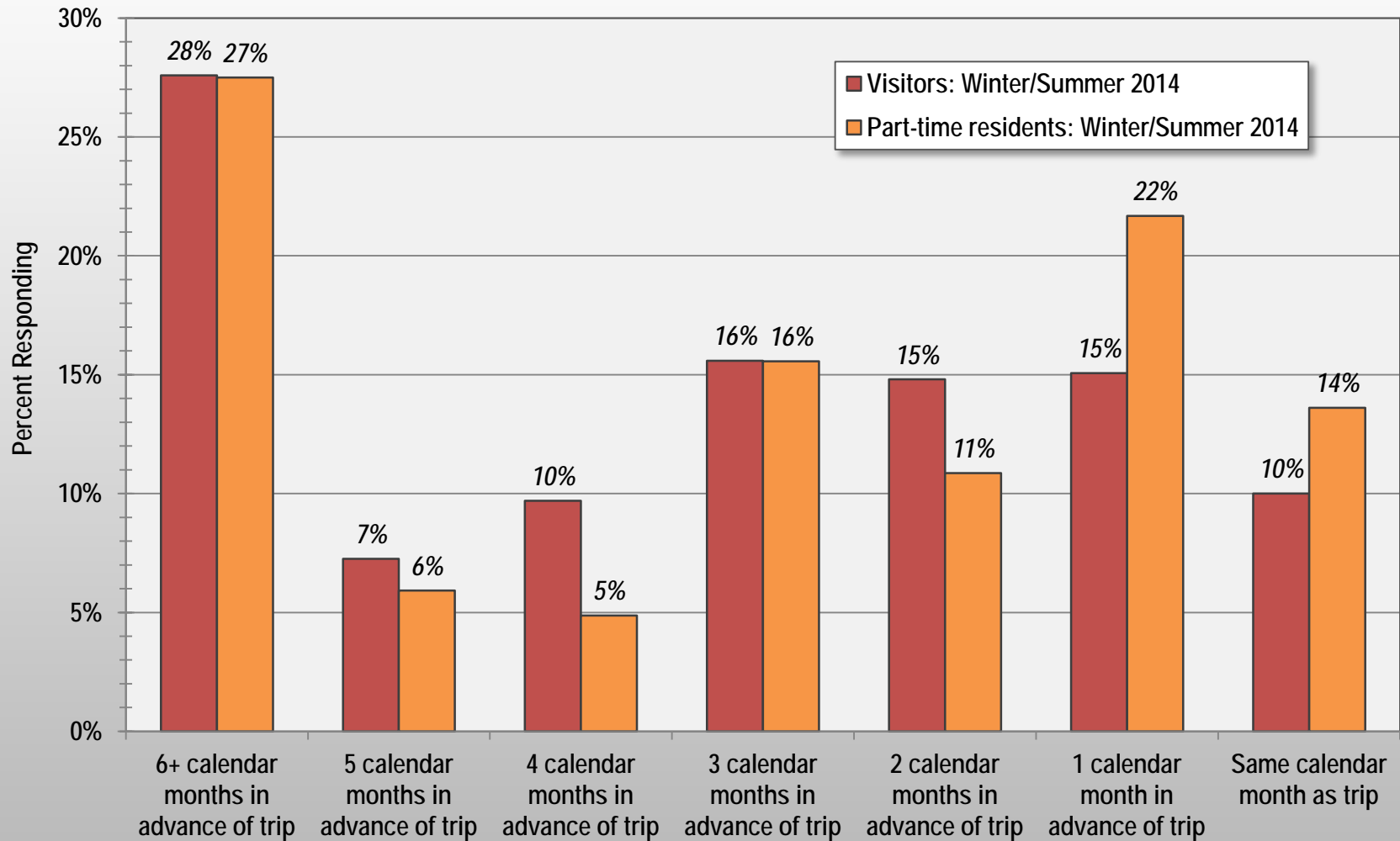
# (If considered other airports for this trip) Why did you choose SUN?



# Importance of Flights to SUN in Decision to Visit SV



# Trip Consideration Lead Time



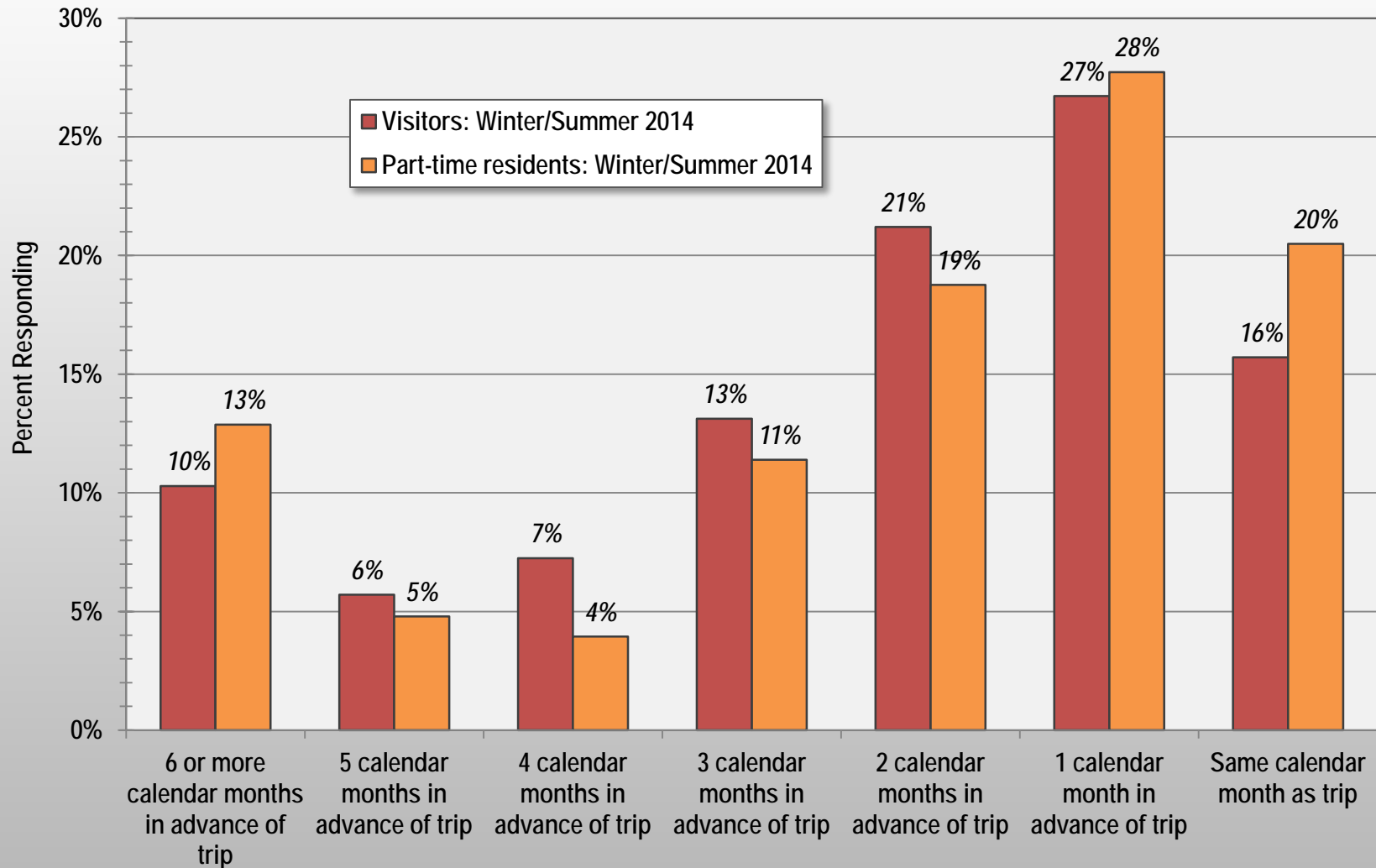
**SHORTER CONSIDERATION LEAD TIMES FOR PT RESIDENTS THAN VISITORS.**

25% of visitors and 35% of PT residents began considering <=1 calendar mo. in adv.

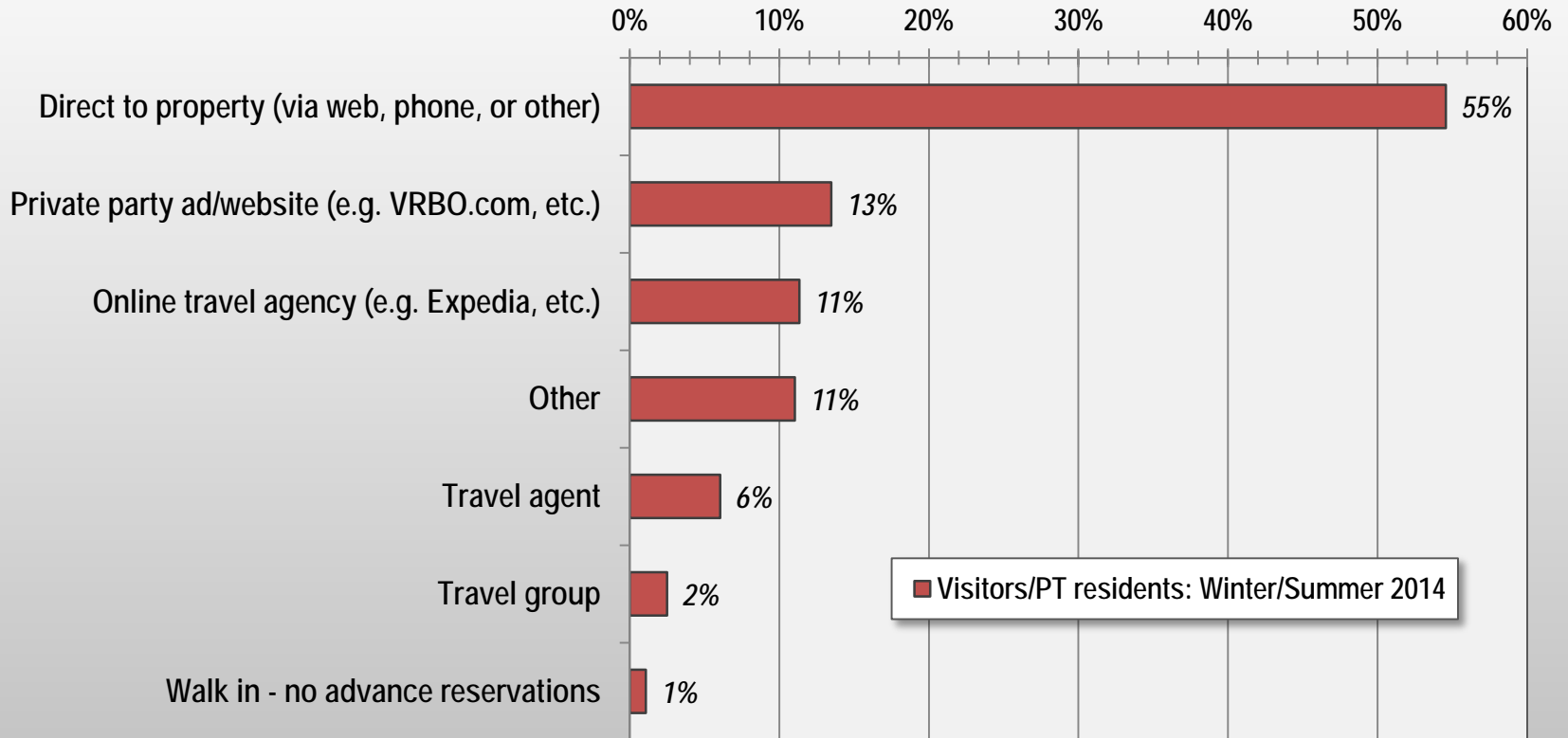
30% of visitors and 26% of PT residents began considering 2-3 calendar mo. in adv.

45% of visitors and 38% of PT residents began considering 4+ calendar mo. in adv.

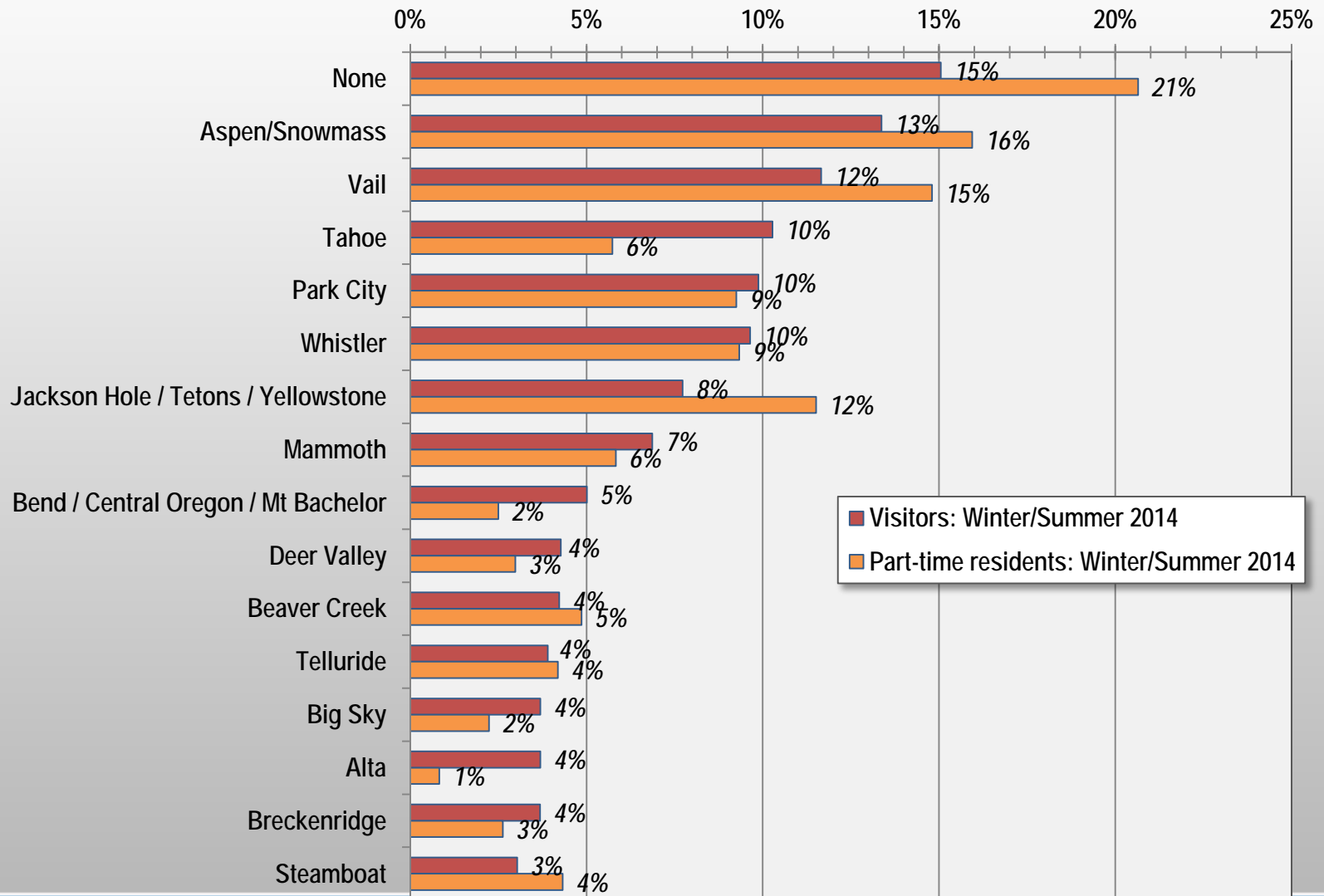
# Flight Booking Lead Time



# How did you book your lodging? (If rental)



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



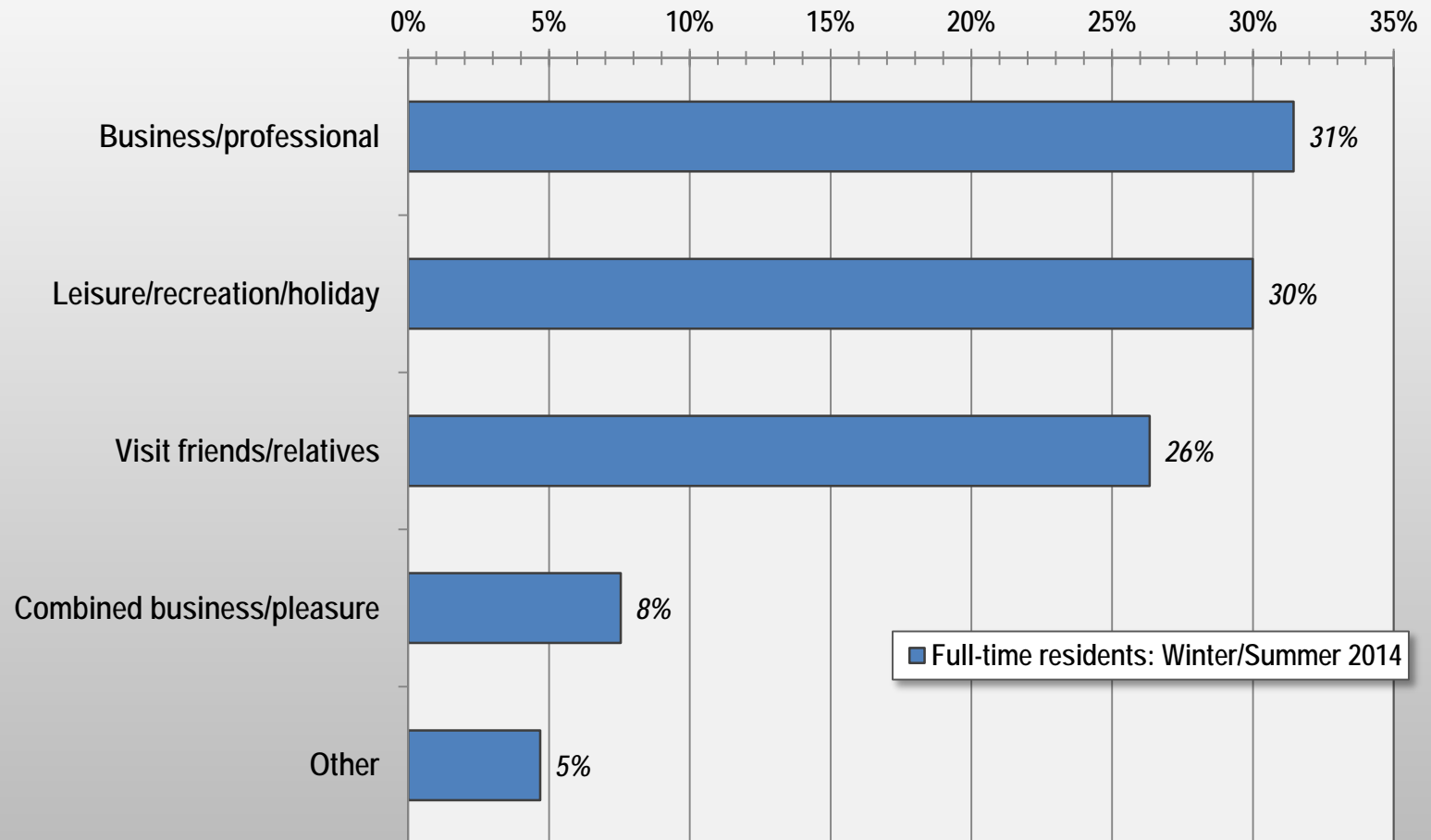
*Top competitors: Aspen/Snowmass, Vail, Tahoe, Park City, Whistler, Jackson Hole, Mammoth. Many others too.*



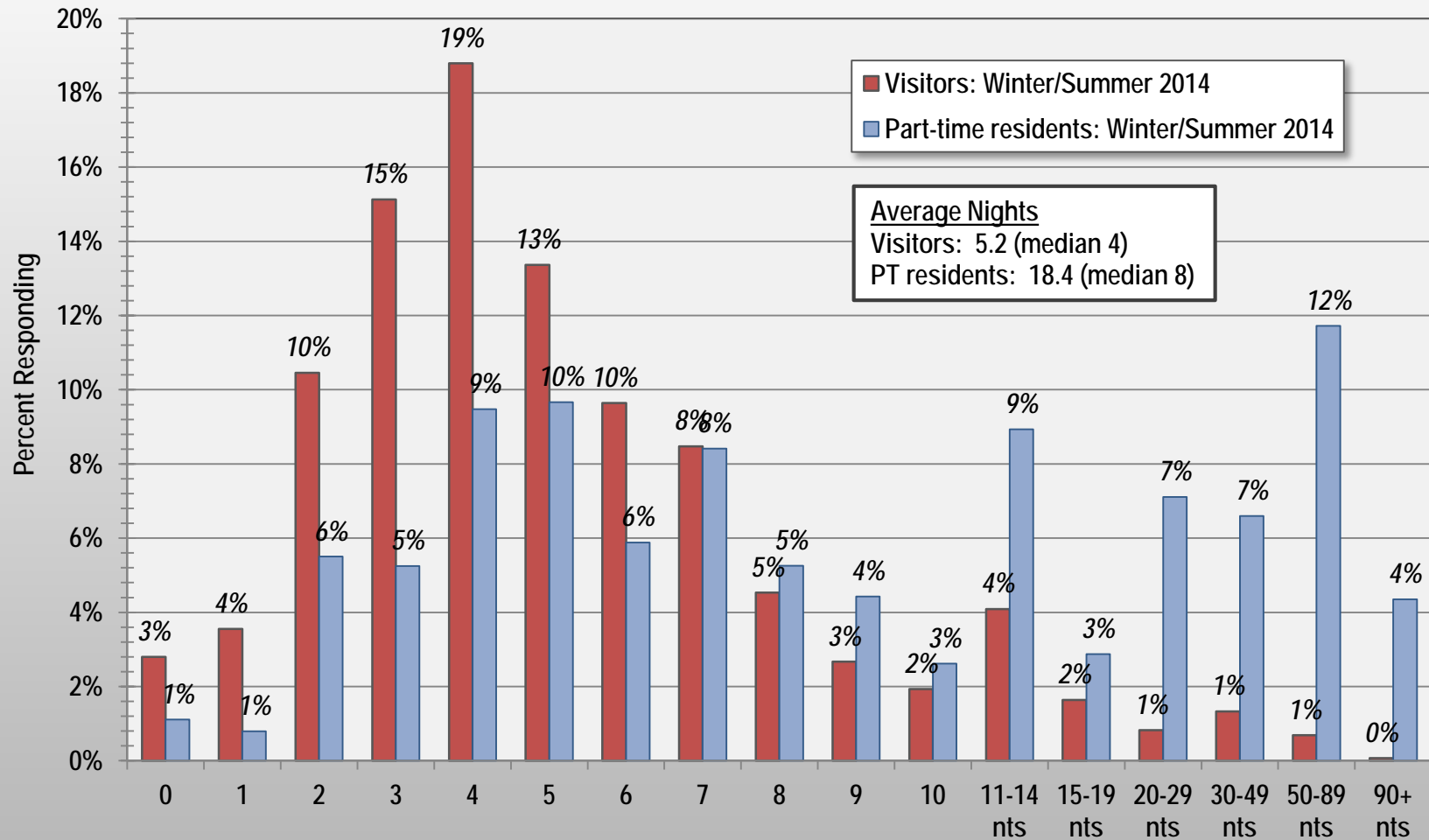
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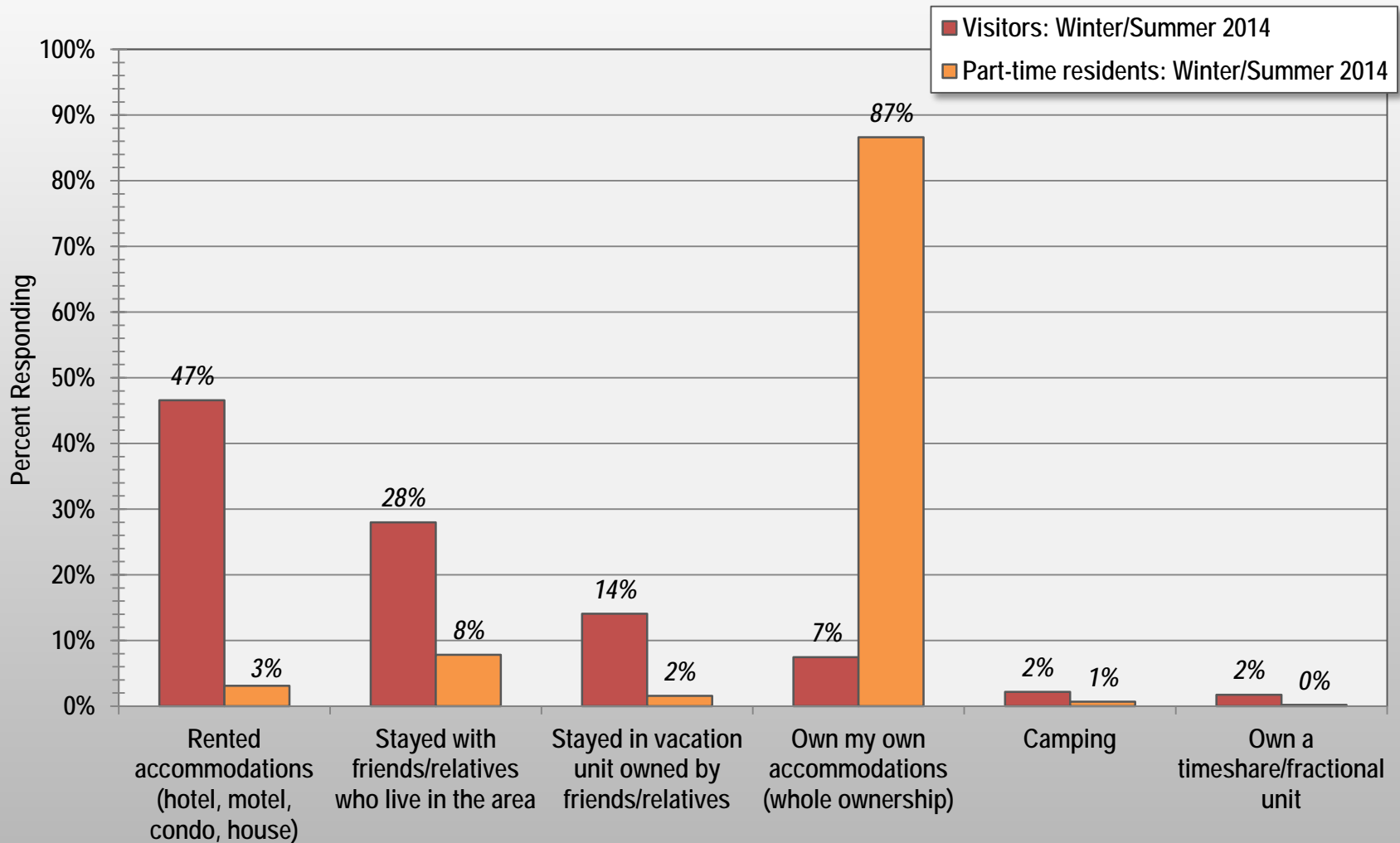
# Full Time Locals: Main Trip Purpose



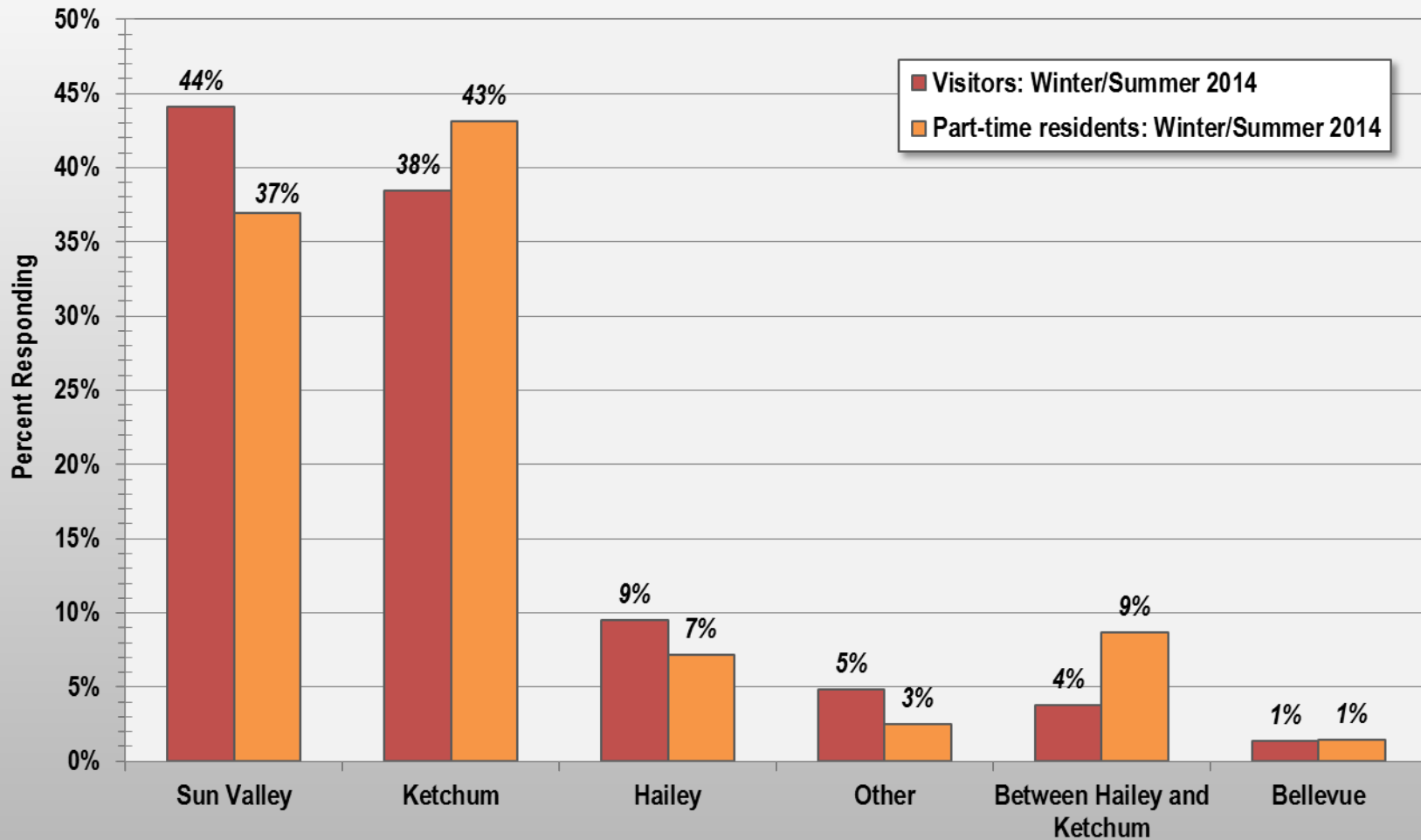
# Trip Nights



# Accommodations Type



# Accommodations Location



# Average Per Capita Daily Expenditures

	Visitors: Winter/ Summer 2014	PT residents: Winter/ Summer 2014	Total Visitors & PT residents: Winter/Summer 2014
Lodging	\$50	\$1	\$26
Restaurants/food and beverage	\$110	\$95	\$103
Shopping/retail purchases	\$47	\$59	\$53
Entertainment and recreation	\$75	\$67	\$72
Local transportation	\$18	\$8	\$14
Other (incidentals, tips, sundries)	\$18	\$24	\$21
<b>TOTAL</b>	<b>\$318</b>	<b>\$255</b>	<b>\$288</b>

# Winter/Summer 2014 Economic Impact of Visitors & PT Residents (2<sup>nd</sup> Homeowners)

		Visitors: Winter/ Summer 2014	PT residents: Winter/ Summer 2014	Total Visitors & PT residents: Winter/Summer 2014
	Per capita daily spend	\$318	\$255	\$288
x	Average nights of stay	5.2	18.4	8.0
=	Per capita spend per trip	\$1,647	\$4,701	\$2,321
	Share of passengers (~ 58K total pax)	59%	18%	77%
x	Number of passengers	34,080	10,501	44,582
=	Aggregate direct spend (millions)	\$56M	\$49M	\$105M

# Economic Impact of First-Time Visitors

## Winter/Summer 2014

		Delta to SLC	Alaska to LAX	Alaska to SEA	United to DEN	United to SFO	TOTAL
	Total passengers (approx.)	26,370	10,931	11,743	2,831	6,543	58,418
x	% First-time visitors	21%	21%	17%	27%	25%	21%
=	# First-time visitors	5,552	2,347	1,972	769	1,617	12,244
FIRST-TIME VISITOR ECONOMIC IMPACT:							
	Per capita daily spend*	\$307	\$307	\$307	\$307	\$307	\$307
x	Average nights of stay	4.4	4.5	3.2	5.8	4.3	4.3
=	Per capita spend per trip	\$1,362	\$1,389	\$972	\$1,771	\$1,335	\$1,328
	Aggregate direct spend	\$7,600,000	\$3,300,000	\$1,900,000	\$1,400,000	\$2,200,000	\$16,300,000
*Assume similar per capita daily spend across all flights due to sample size limitations.							

*First-time visitors overall:*

- Average per capita spend per trip: \$1,328

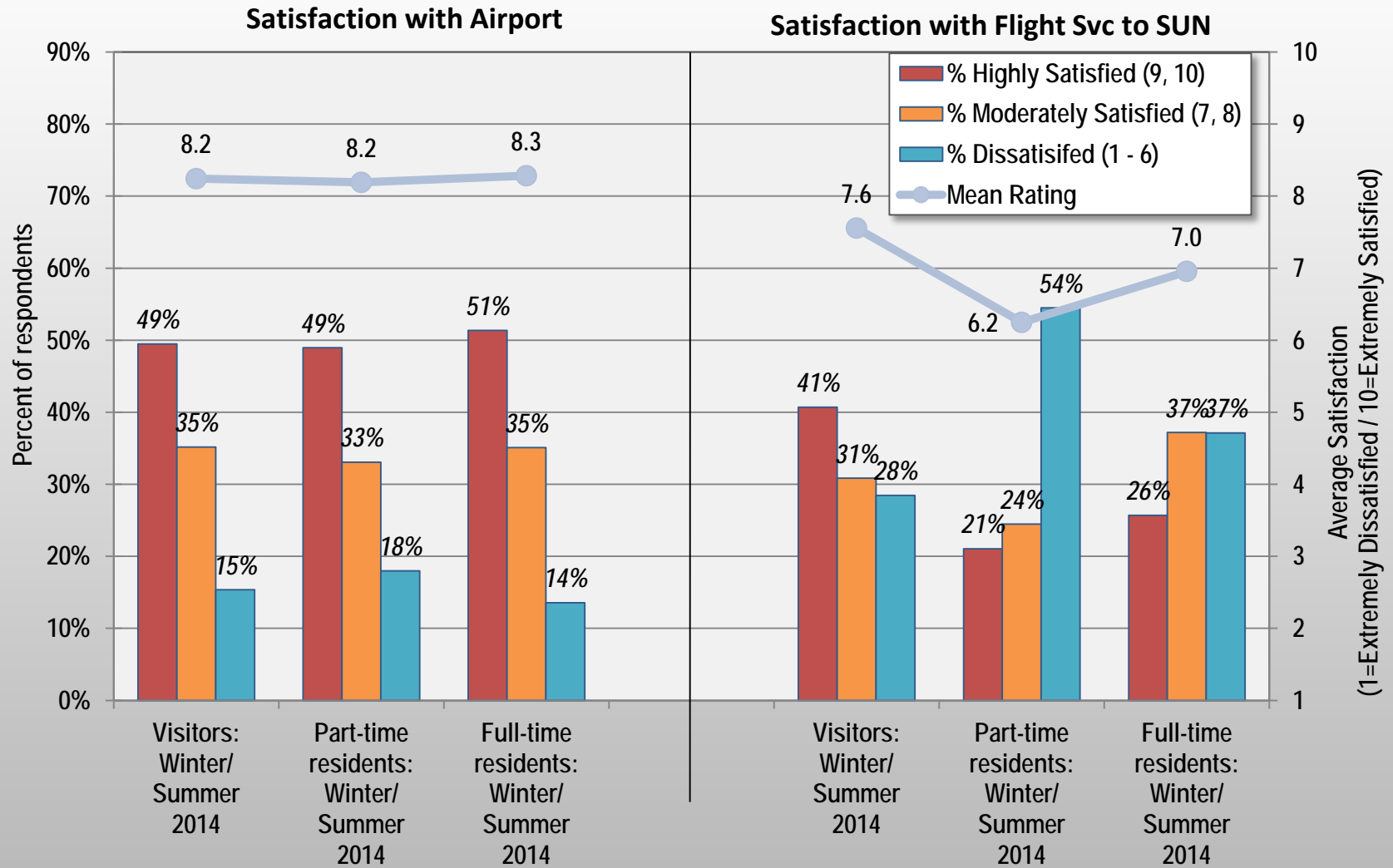
- Aggregate direct spend: \$16.3 million



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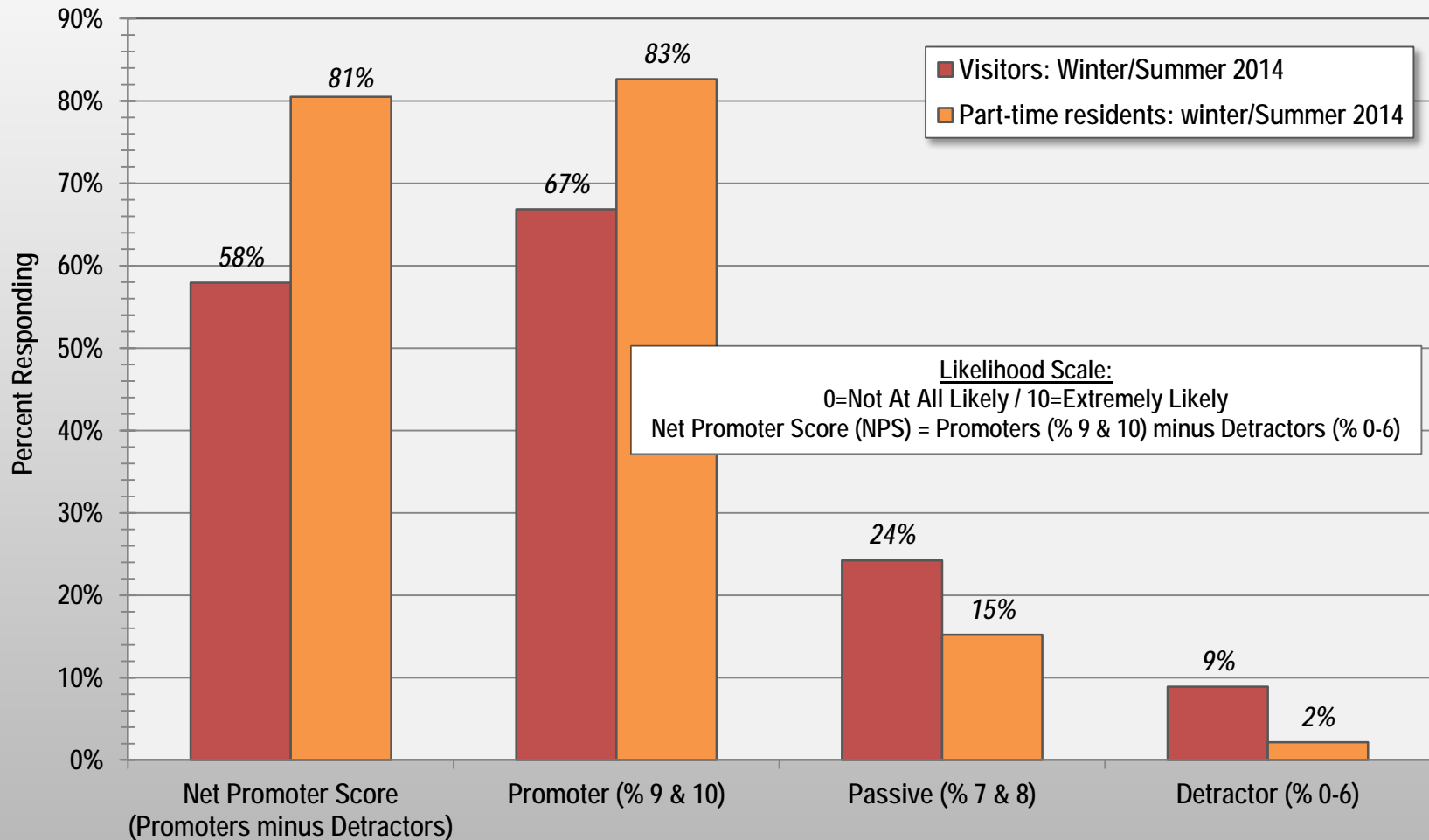
# Satisfaction w/ Airport & Flight SVC to SUN



*Re: airport, most respondents are highly or moderately satisfied.*

*Re: flight service, respondents are split between high, moderate and low satisfaction (except PT residents are mostly dissatisfied).*

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



# Strengths of SV vs. Other Resorts Visited in Past 3 Years

## SUMMER:

- Weather
- Activities – esp. hiking, biking, fishing, golf, paths/trails, overall variety of activities
- The people
- Scenery / beauty / mountains
- Events
- Culture, art, concerts/music/symphony, ice skating
- Charm, small town feel, uncrowded
- Restaurants

## WINTER:

- Quality of the skiing / ski mountain / snow
- Town experience
- Friendly people
- Scenery / beauty
- Restaurants / food
- Uncrowded
- Weather / sun
- Convenience / accessibility once at the town/resort

# Weaknesses of SV vs. Other Resorts Visited in Past 3 Years

## SUMMER:

- #1: “None”
- Other:
  - Flights / accessibility (difficult/limited, expensive)
  - Fires
  - Cost / expensive
  - Weather, heat
  - Crowded, traffic
  - Restaurants (e.g. customer service, expensive, close early, not avail. at airport)

## WINTER:

- #1: Difficult to get to / limited flight access
- Secondly:
  - Low snow
  - Cost / expense
- Other:
  - Air travel dependability in inclement weather
  - Lack of restaurant / lodging / shopping options
  - Limited nightlife, outlets close early
  - Limited youth/children & young adult activities / offerings

# Suggestions for improving airport and flight service to SV

## Airport:

- More/better terminal restaurant/bar/food service options
- Improved security process
- Better seating, add store / gift shop

## Flight service:

- More flights/options
- More direct flights (new cities)
- Maintain/expand service to Seattle, Denver, SFO, LAX
- Expensive/price
- More year-round service / extend seasonal flights
- More reliable flights (timely, not cancelled, reduce weather-related diversions)
- Better bussing if diverted
- Improve flight connections
- Improve flight arrival/departure times

# Changes in Visitor Profile: Winter/Summer 2014 vs. 2013

## CHANGES FOR VISITORS & PT RESIDENT AIR TRAVELERS 2014 v. 2013

*Note that United flights to DEN and SFO were added in 2014 (not present 2013).*

- **Increased % of visitors** (59% vs. 56%) and **PT residents** (18% vs. 16%), **fewer % FT residents** (23% vs. 28%). *(Note: total # of passengers increased so all types also increased in numbers)*
- **Among visitors only, increased share were first-time visitors to SV** (36% vs. 34%).
- **Slight uptick in share of visits from Northeastern & Southern US Census Regions** (+2 ppts), **slight decrease in share of visits from Western US** (-2 ppts).
- **Proportionately increased visits from CA** (+3 ppts), **particularly San Francisco DMA** (+3 ppts). **Decreased visits from WA** (-3 ppts), **esp. Seattle DMA** (-3 ppts).
- **Slightly older age** (median age increased to 52 from 51).
- **More empty nesters** (+4 ppts), **fewer households with kids** (-3 ppts).
- **More affluent** (interpolated median income increased to \$216,000 from \$210,000).

# Changes in Visitor Profile: Winter/Summer 2014 vs. 2013

## CHANGES FOR VISITORS & PT RESIDENT AIR TRAVELERS, 2014 v. 2013

- **Increased nightly room rates** (average rose to \$285 from \$270, +5.6%)
- **Increased lodging bookings via private party websites** (+6 ppts, e.g. VRBO), **fewer via travel agents** (-7 ppts)
- **A slightly reduced share considered airports other than SUN for travel** (28% vs. 29%).
- **Among those considering other airports, but ultimately selecting SUN: an increased share selected SUN because of availability/selection of flights** (+6 ppts).
- **Net promoter score (for Sun Valley as a travel destination) held steady at 63%.**
- **Per capita daily spend during trip held steady (\$288 vs. \$287).**



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

## HOW OUR AIR TRAVELERS DIFFER

- Extremely strong California / Washington focus
- Large PT resident and FT resident segments
- Older, affluent profile
- Low share of visitors stay in rental lodging (*vs. w/ friends/fam or vacation unit*)
- High share of travel for business, visiting family/friends; low share for leisure
- High seasonal crossover (*winter visitors coming in summer & vice versa*)
- High restaurant/F&B spend
- Top-tier mountain resort competitors to Sun Valley:  
Aspen/Snowmass, Vail, Park City, Whistler, Jackson Hole, Tahoe, Mammoth
- Atypical strengths of SV: town, weather, uncrowded, food
- Atypical weaknesses of SV: flight reliability; lack of young adult & kids activities.



# **Friedman Memorial Airport Passenger Survey: 2014 Annual Results**



# **THANK YOU!**

**Prepared for: Fly Sun Valley Alliance**  
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**November 2014**