



RRC
ASSOCIATESSM



BLAINE COUNTY BUSINESS AIR TRAVEL SURVEY

November/December 2017

Photo: iFlySun.com

- **Purpose**

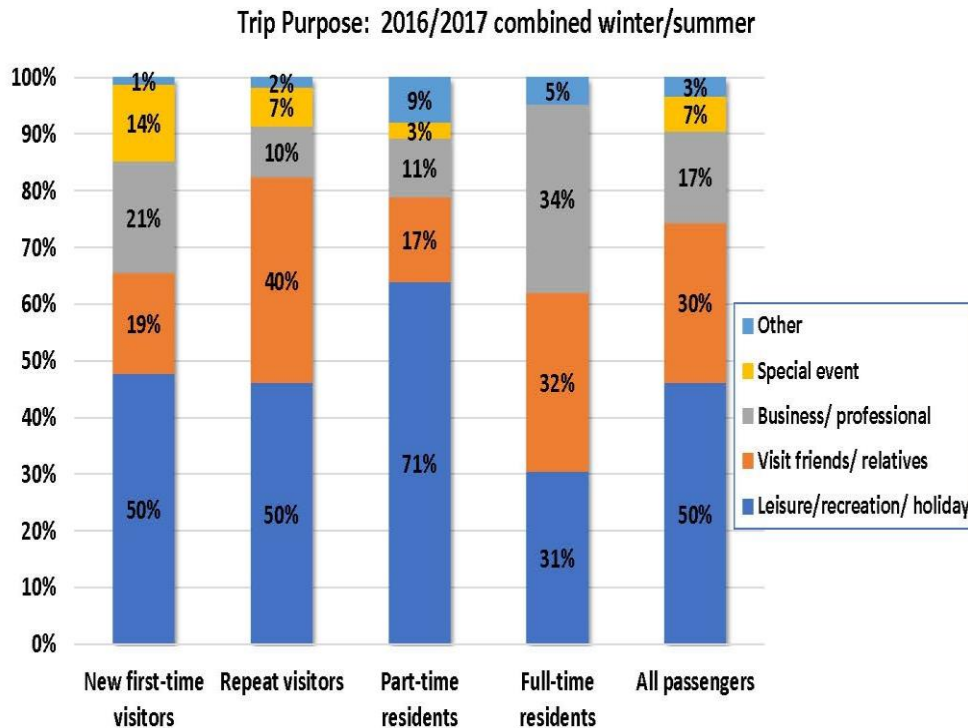
- Understand flight travel volumes, airport market shares, and airport decision factors among Blaine County businesses / organizations.
- Identify opportunities to improve SUN's attractiveness and utility for local businesses.

- **Methodology**

- Blaine County businesses invited to take online open-link survey via broadcast emails sent by local business association partners (SVED, VSV, The Chamber, KIC, FSVA)
- Survey fielded November 27 - December 15, 2017
- 180 responses received: 139 completes (77%), 41 partial completes (23%)



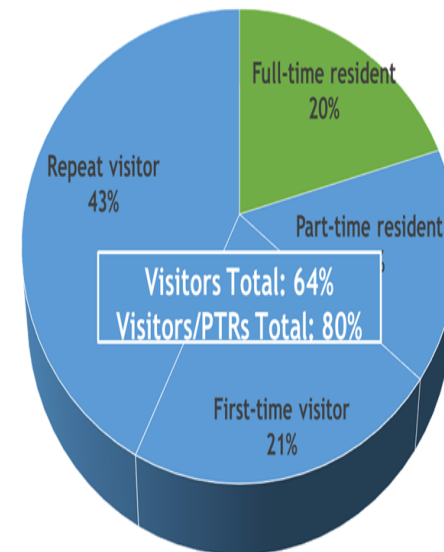
- **Local Biz Travelers: 8% of Total SUN Air Pax (7,000 of 89,000)**
- **20% of SUN Air Pax are Local Residents; 34% of travel on business**



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

Resident/Visitor Mix of SUN Passengers

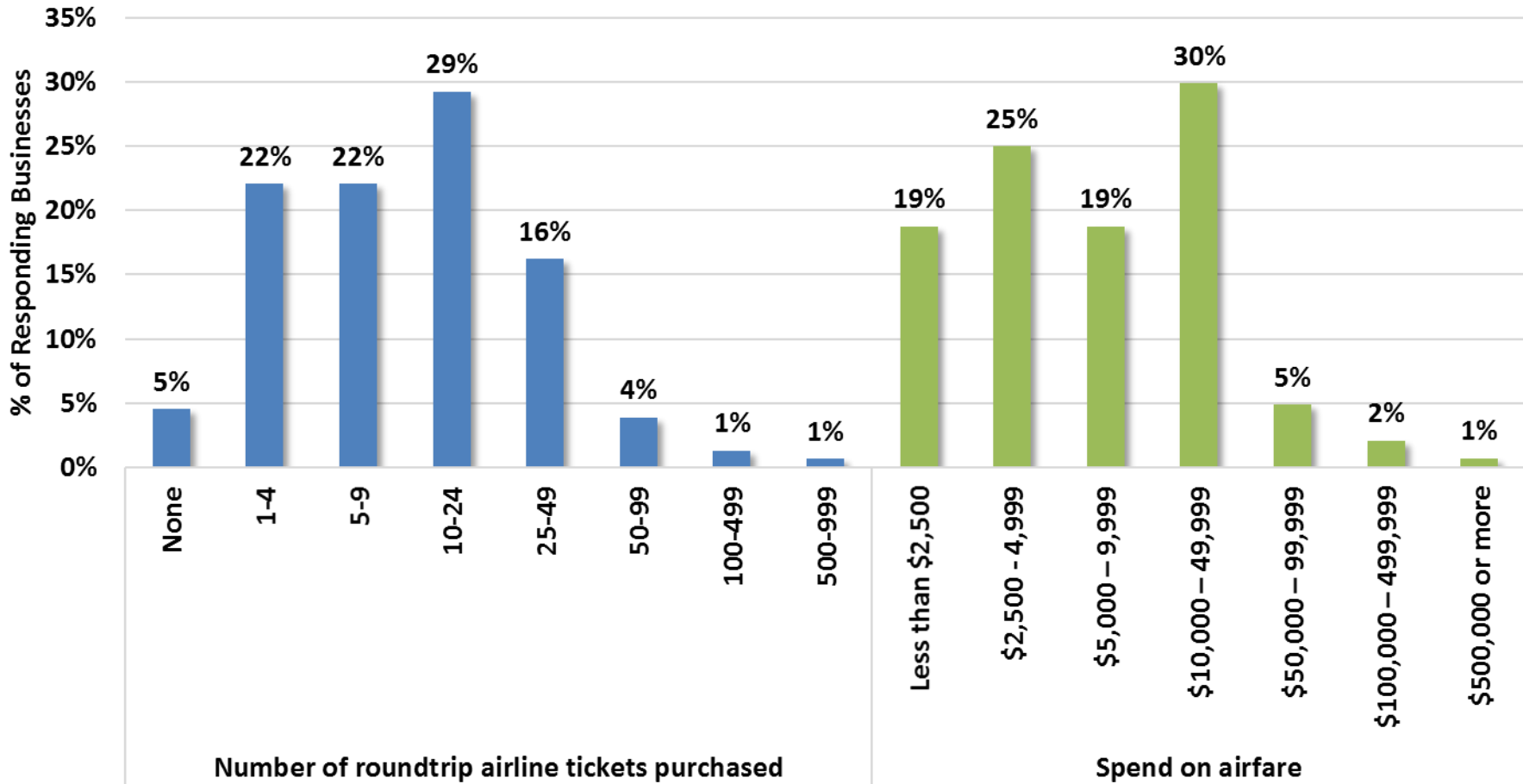
2016 & 2017 Combined Annual Results



Source: FSVA SUN Air Passenger Survey, RRC Associates

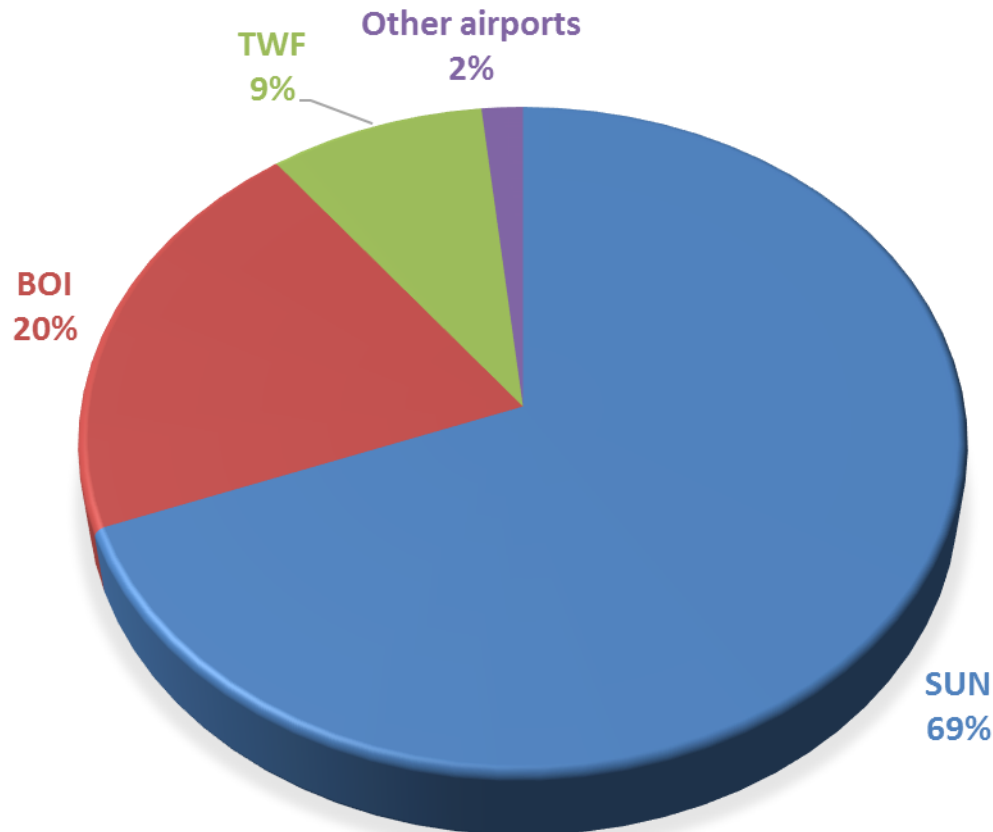
VOLUME OF TICKETS AND AIRFARE

Number of roundtrip airline tickets, and spend on airfare, for employee business trips originating from Blaine Co. in the past 12 months (regardless of airport used)



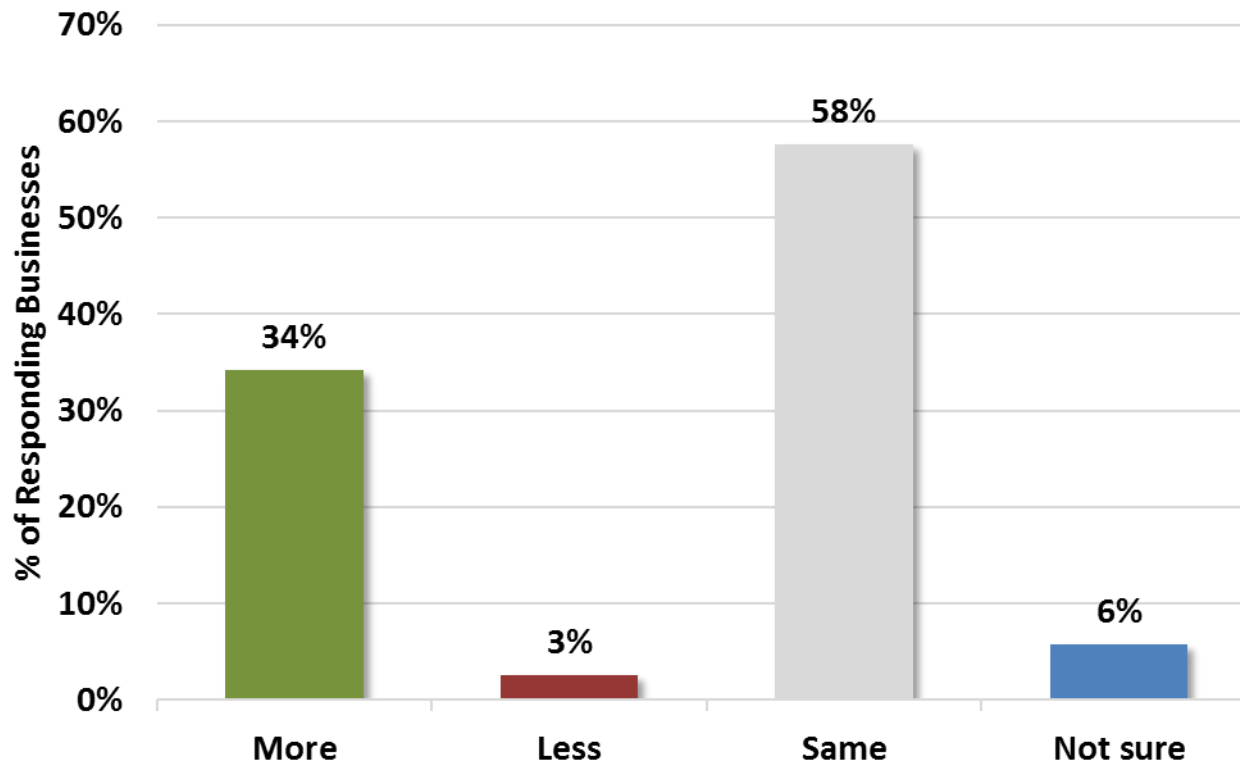
- 44% of businesses purchased 1-9 roundtrip tickets in past 12 mo; 45% purchased 10-49; 6% purchased 50+. (5%: 0 tix)
- 19% of businesses spent <\$2.5K on airfare in past 12 mo; 44% spent \$2.5-9.9K; 30% spent \$10-49.9K; 8% spent \$50K+. 4

Aggregate share of employees' roundtrip flights, by airport of origination (Responses weighted by volume of flights purchased by businesses)



- SUN captures the large majority of local business flights (69%), followed by BOI (20%), TWF (9%), and other airports (2%). *Results are weighted by volume of flights purchased by respondents.*

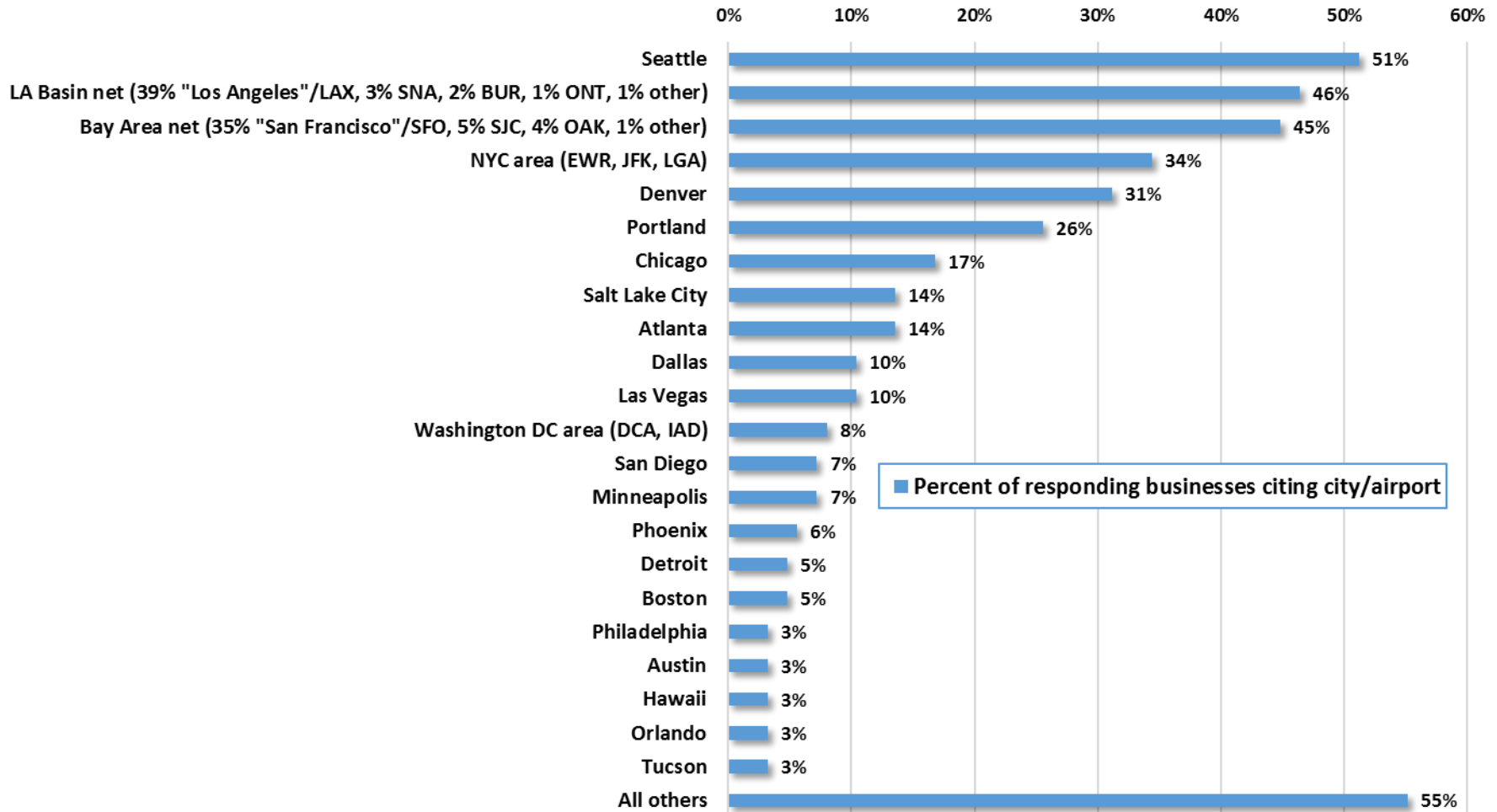
Do you expect that the local employees of your business/organization will fly more, less, or about the same amount for business in 2018 as they did in 2017?



- A greater share of employers anticipate more (34%) than less (3%) flight volume in 2018 than 2017.
- The largest share of employers anticipate the same volume (58%).

TOP FLIGHT DESTINATIONS

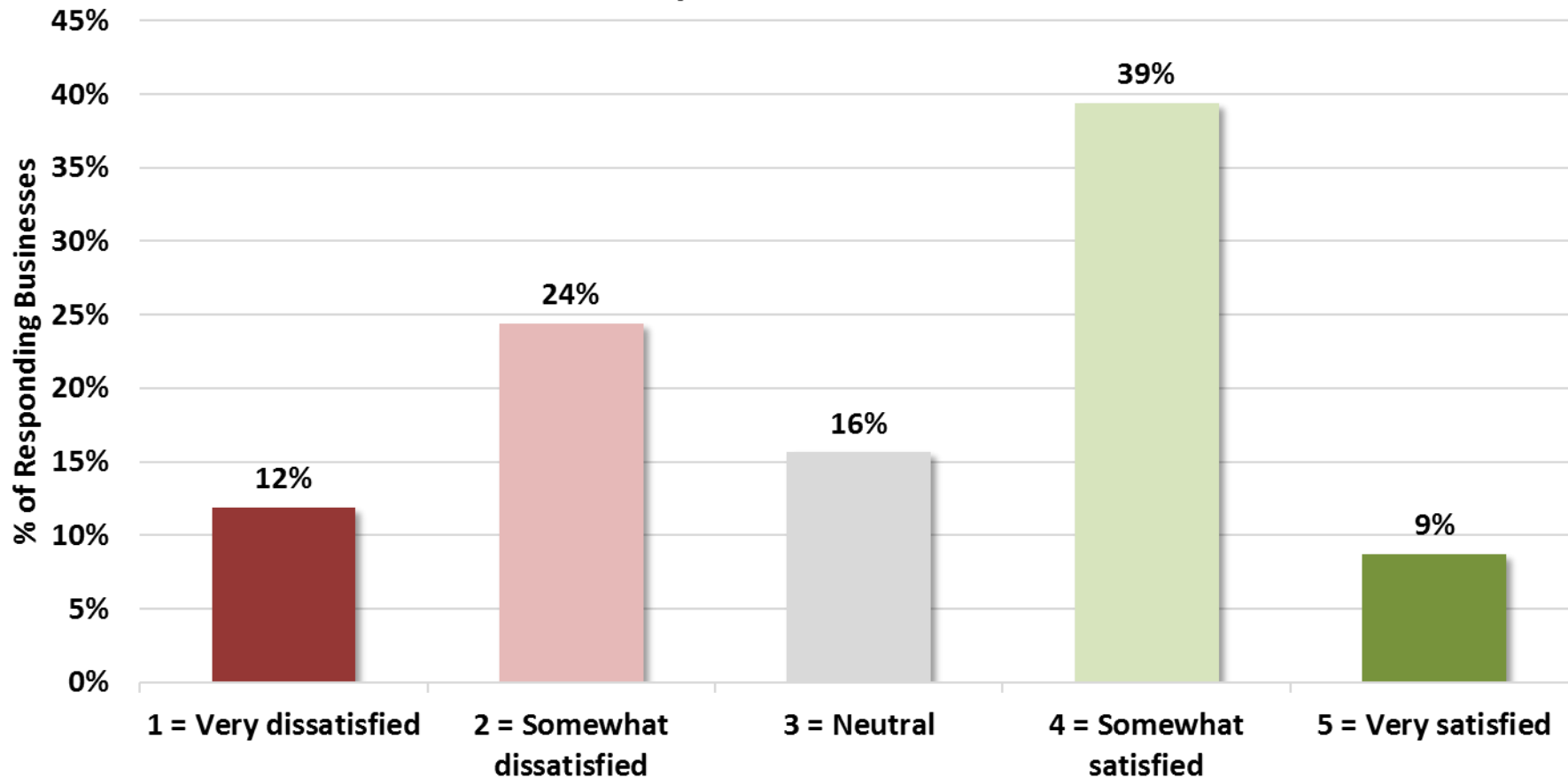
Top five destinations your local company/organization's employees will fly to most frequently in the coming year



- About half of responding employers cite Seattle as one of their top five destinations in the coming year (51%).
- Following are the LA Basin (46%), SF Bay Area (45%), NYC area (34%), Denver (31%), Portland (26%), and Chicago (17%).

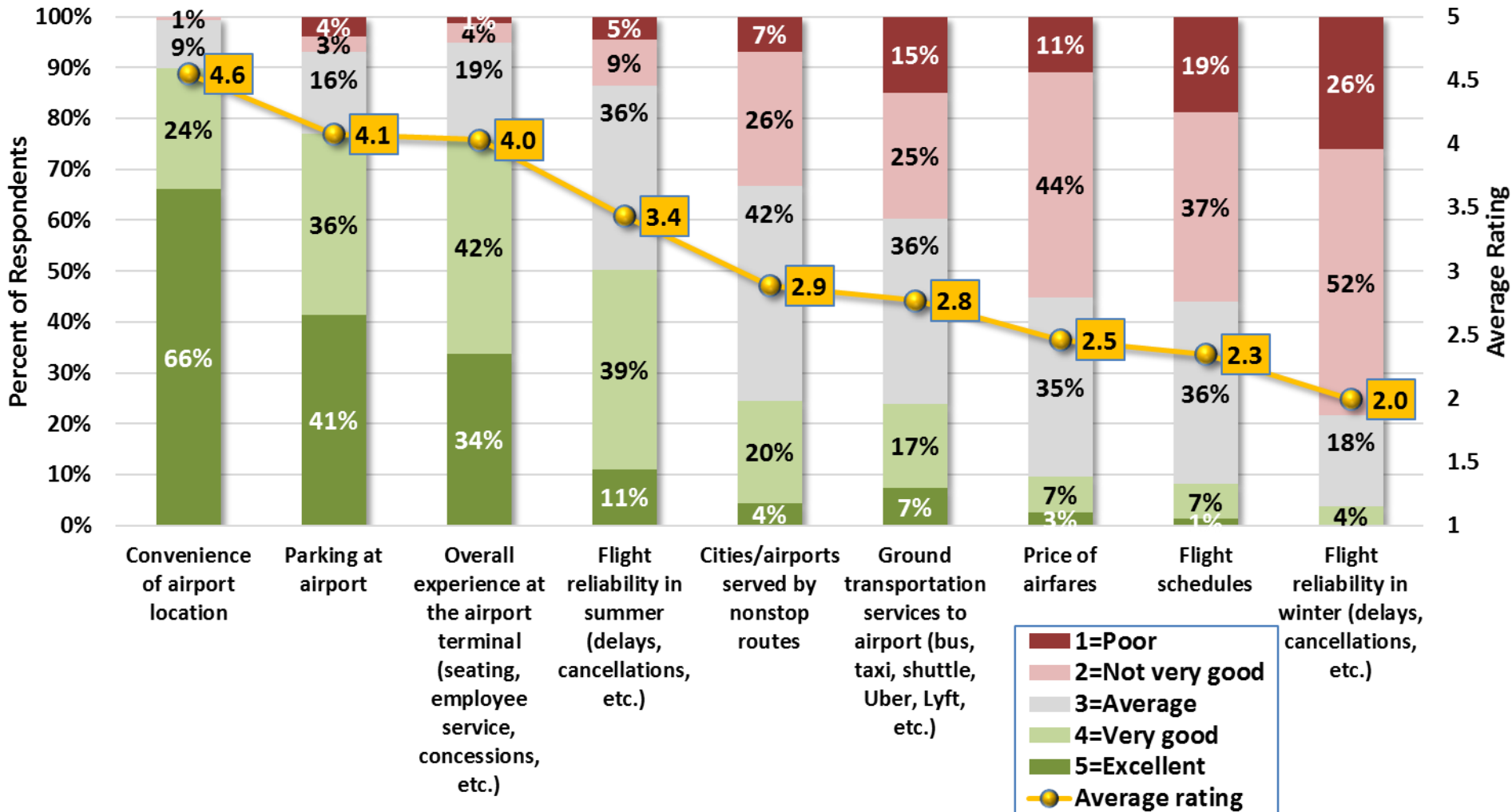
OVERALL SATISFACTION WITH SUN FLIGHT SERVICE

Overall, how satisfied is your business/organization with the flight service currently available at SUN?



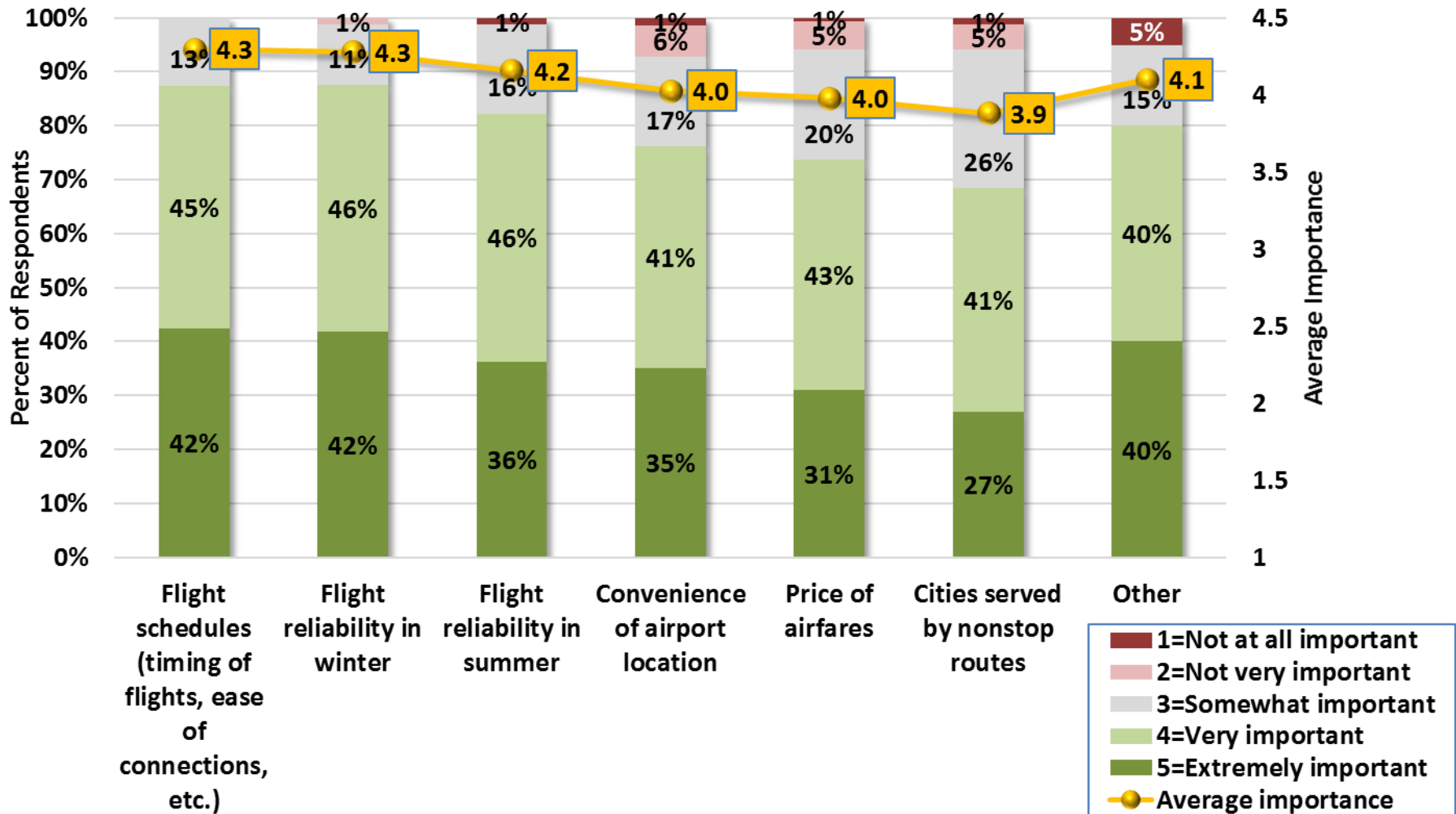
- Opinions are mixed: 48% are somewhat/very satisfied; 16% are neutral; and 36% are somewhat/very dissatisfied.

HOW WOULD YOU RATE SUN ON ...



- Most respondents rate SUN as “excellent” or “very good” for convenient location (90%), parking (77%), terminal experience (76%), and flight reliability in summer (50%).
- Most respondents rate SUN as “not very good” or “poor” for flight reliability in winter (78%), flight schedules (56%), and airfare costs (55%).
- Opinions are mixed re: cities served by nonstop routes. Opinions tilt somewhat negative for ground transportation services to airport.

HOW IMPORTANT ARE THE FOLLOWING FACTORS IN CHOOSING TO USE SUN?

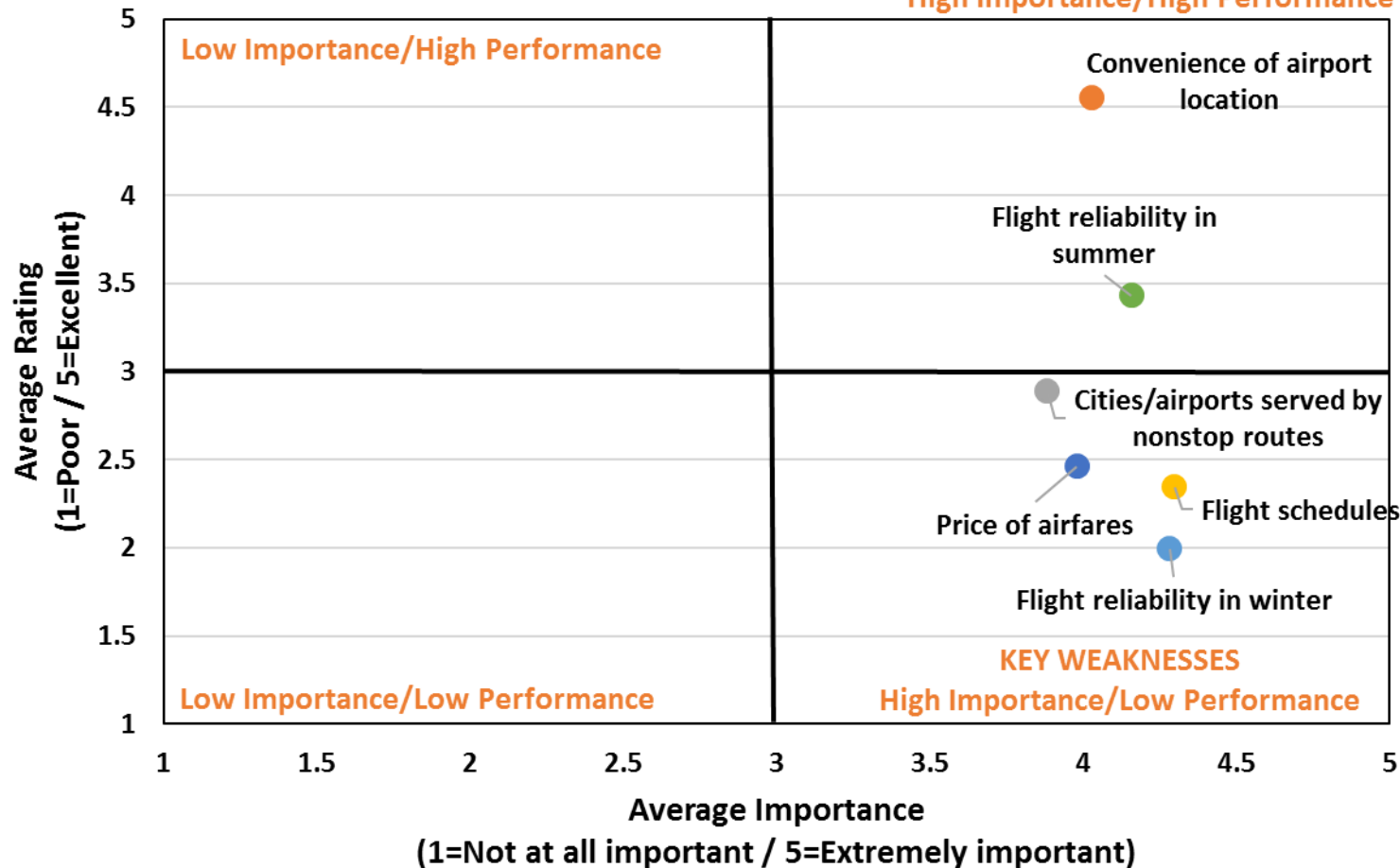


- All measured factors are “very” or “extremely” important to most respondents: flight schedules (87%); flight reliability in winter (88%); flight reliability in summer (82%); convenience of airport location (76%); price of airfares (74%); cities served by direct flights (68%).
- Note: Results are likely to be indicative of the importance of factors in the decision whether or not to use SUN, rather than as strictly affirmative reasons for choosing SUN over other airports.

Average importance of factors in choosing to use SUN vs. Average rating of SUN on these factors

KEY STRENGTHS

High Importance/High Performance

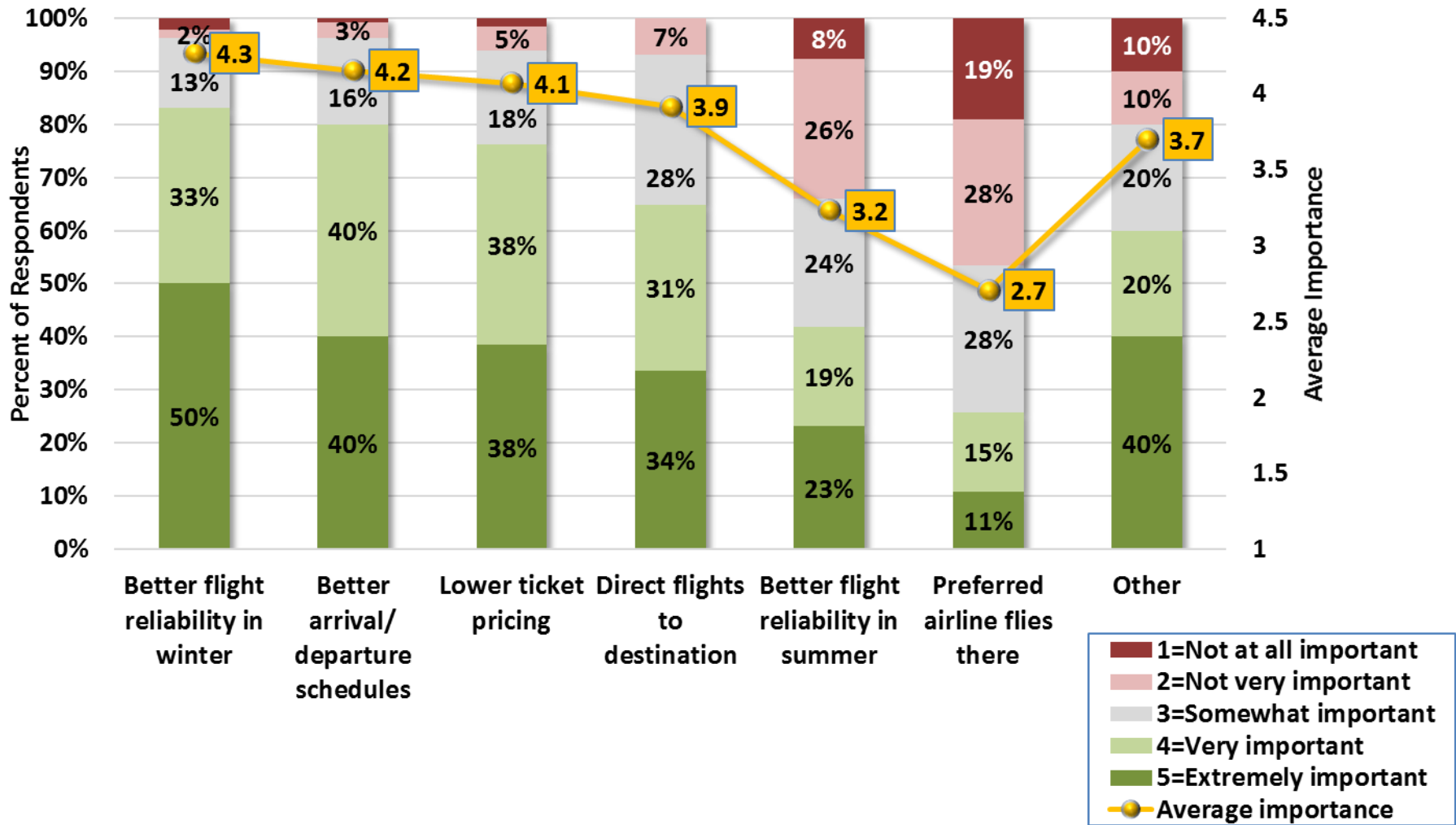


KEY WEAKNESSES

High Importance/Low Performance

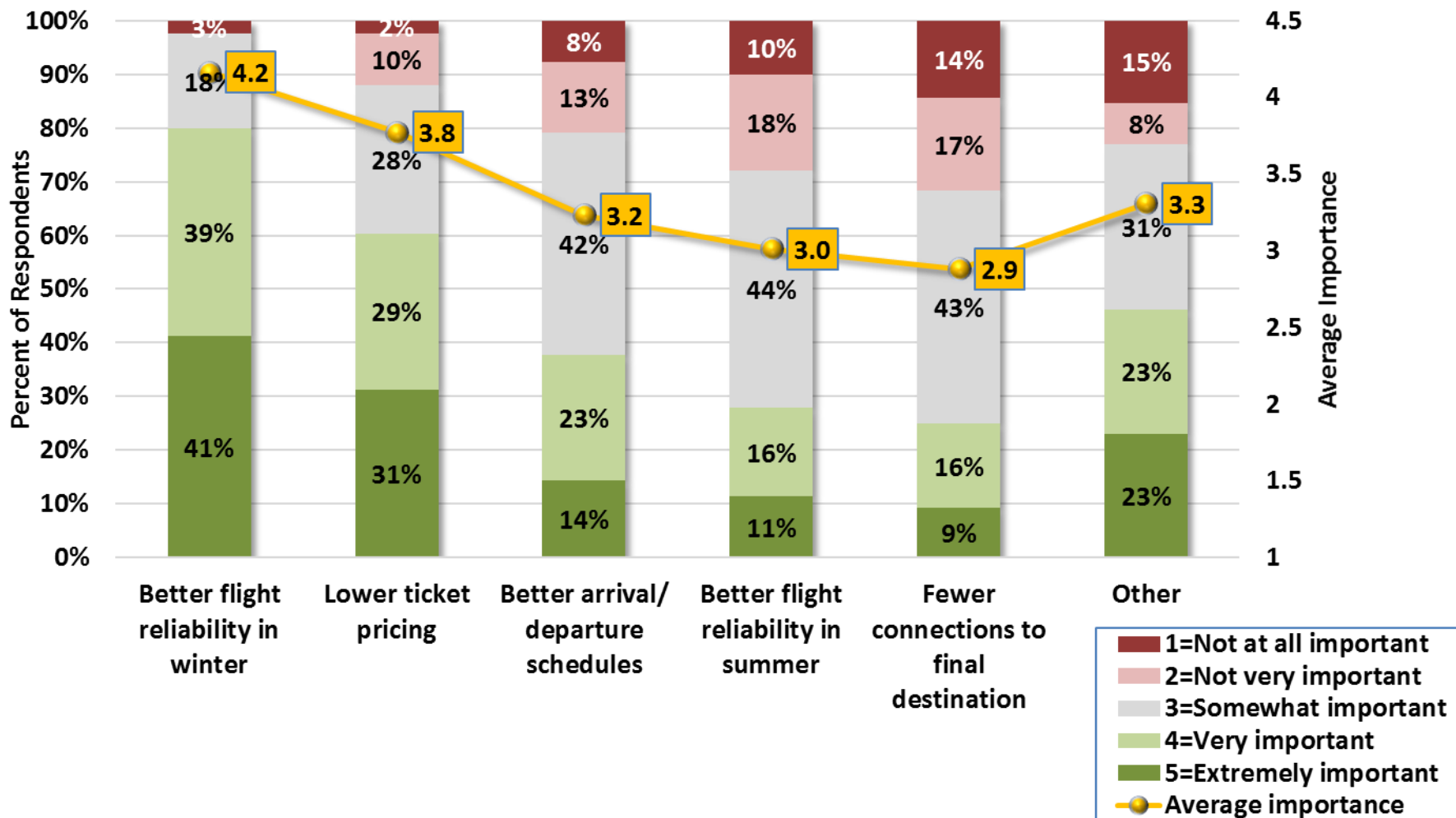
- Key strengths of SUN include convenience of airport location and, to a lesser degree, flight reliability in summer.
- Key weaknesses of SUN include flight reliability in winter, flight schedules, and price of airfare.
- Cities/airports served by nonstop routes is comparatively average, not fully a strength or a weakness to respondents.

HOW IMPORTANT ARE THE FOLLOWING FACTORS IN CHOOSING TO USE BOI?



- Leading factors in choosing to use BOI are better flight reliability in winter (83% very/extremely important); better arrival/ departure schedules (80%); lower ticket pricing (76%); direct flights to destination (65%).
- Less important factors are better flight reliability in summer (42%) and preferred airline flies there (26%).

HOW IMPORTANT ARE THE FOLLOWING FACTORS IN CHOOSING TO USE TWF?



- Leading factor in choosing to use TWF is better flight reliability in winter (80% very/extremely important).
- Following is lower ticket pricing (60% very/extremely important).
- Less important: better schedules (38%), summer reliability (28%), fewer connections (25%).

PRIORITIES FOR SUN AIR SERVICE

Please let us know your business/organization's top priorities for new and expanded air service to SUN (e.g. in terms of cities served, frequency and timing of flights, seasonality of flights, etc.)

MOST FREQUENT WORDS IN COMMENTS (90 comments received)

additional (5) air (4) airport (4) alaska (4) arrivals (5) available (5) **better** (12) boise (3) book (3)
business (10) cancelled (6) cities (10) connections (16) consistent (5)
costs (10) daily (10) delta (7) denver (5) departures (5) destinations (5) direct (10)
early (6) east (4) factor (4) **flights** (93) fly (11) frequency (13)
frequent (9) hours (10) hubs (5) important (10) layover (11) lower (6)
major (4) miss (6) morning (5) night (5) open (3) options (7) people (7) per (5) preferred (3)
price (12) priority (3) **reliability** (17) return (4) round (9) san (5) schedules (8)
season (9) seattle (4) service (13) slack (6) **slc** (27) sun (10) **timing** (23)
travel (17) winter (8) work (7) year (16)

- Common themes: Cost of airfare; reliability of service; more flights per day to hubs to prevent long layovers; more flights year-round (including during slack season); flights on more days of the week; better timing of flights (e.g. late night return flight to SUN is problematic); better/more ground transportation services; add flights to more cities; etc. Image credit: Tagcrowd.com.
- Among 38 respondents citing specific cities: top city by far is SLC (58%); then SEA (16%), PDX/DEN/SFO/LAX (8% ea.) 14



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THANK YOU

Photo: iFlySun.com