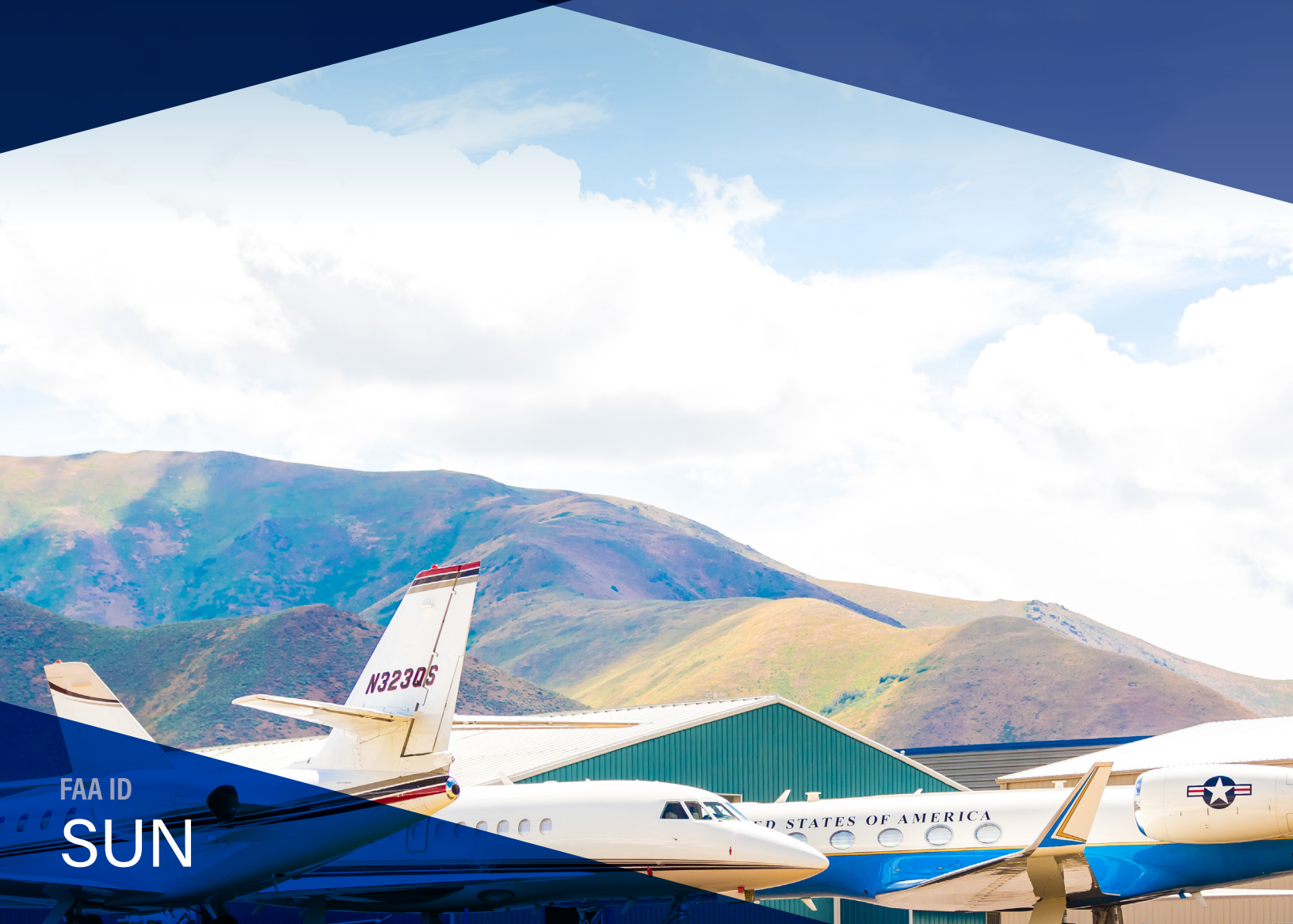
IDAHO AIRPORT SYSTEM PLAN UPDATE 2020

& AIRPORT ECONOMIC IMPACT ANALYSIS UPDATE

HAILEY

Friedman Memorial

SUMMARY REPORT



FAA ID

SUN

SUN

Understanding the Airport

Nestled high in the Wood River Valley, the City of Hailey has a population of just over 8,500 and serves as the gateway to year-round outdoor recreation in the heart of Idaho's backcountry, where rugged terrain and all-season outdoor experiences attract visitors year-round. Since the 1970s, Hailey has grown significantly, partly due to the recently booming tourism industry. Friedman Memorial Airport (SUN) is a commercial service airport that serves the communities in the Wood River Valley and beyond. The airport is jointly owned by the City of Hailey and Blaine County and is operated by the Friedman Memorial Airport Authority. Scheduled commercial airline service has expanded dramatically at SUN in recent years, annually witnessing nearly 90,000 annual passenger enplanements. SUN offers year-round flights to Salt Lake City as well as seasonal service to Los Angeles, Denver, Chicago, Seattle and San Francisco. SUN is the third-busiest commercial service airport in the state, and has extensive charter and corporate jet activity year-round. Tourists and businesses are the most common users of the airport, but it also supports other important general aviation activities. SUN is a significant contributor to the local economy and the state's tourism industry. SUN has long-recognized that its existing site has limited its development potential, and current facilities may be strained in the coming decades due to increasing commercial service and general aviation demands. As such, the airport has evaluated the feasibility of relocating to an alternative site; however, the plan is currently on-hold due to environmental and cost considerations. The airport continues to pursue a dual path approach by accommodating demand at the existing site while conducting planning-level analyses for potential future airport relocation.

AERIAL FIREFIGHTING

MEDICAL OPERATIONS

GATEWAY TO THE BACKCOUNTRY

COMMERCIAL SERVICE

FLIGHT TRAINING

AIRPORT FEATURES		
Associated City	Hailey	
Associated County	Blaine	
Airport Reference Code	C-III	
Primary Runway	ORIENTATION	13 / 31
	DIMENSION	7,550' x 100'
	SURFACE TYPE	Asphalt-GRVD

FORECAST SUMMARY			
Activity	2017	2037	% Change
Based Aircraft	159	202	27%
CS Annual Operations	9,078	10,357	14%
GA Annual Operations	14,978	15,561	4%

AVIATION FORECAST

When planning for new or additional airport facilities, projections of various indicators of aviation demand such as based aircraft and operations can help determine the type and size of necessary improvements.

AIRPORT ROLE	
IASP Role	Federal Role
Primary	Primary

AIRPORT ROLES

Idaho's airport classification structure is designed to establish a network of facilities that support the state's access, mobility, and economic needs while preserving the long-term viability of all airports within the system. The 2020 Idaho Airport System Plan (IASP) Update has identified nine functional roles for the 75 publicly-owned public-use airports in the system. State and federal classifications are the same for airports included in the National Plan of Integrated Airport Systems (NPIAS), while non-NPIAS airports are categorized into three state-specific roles.

Facility and Service Objectives

Facility and service objectives (FSOs) were developed for each Idaho airport role. These objectives provide guidance on the recommended minimum facilities and services that the airport should have to optimally fulfill its functions in the system. The following table summarizes the airport's current facilities and services, FSOs, other projects recommended or identified during 2020 IASP Update, as well as estimated 20-year development costs. Recommended development costs include projects identified during the system plan, 20-year pavement lifecycle costs, future aircraft storage needs based on forecasted activity, and additional needs identified in the Idaho State Capital Improvement Plan (ISCIP). While these projects are included as part of the IASP, it is recognized that implementation of these projects is dependent on local needs. As an integral component of Idaho's airport system, these recommended improvements will ensure that this facility continues to provide state residents, businesses, and visitors with the aviation infrastructure necessary over the next 20 years.

AIRPORT REPORT CARD | FRIEDMAN MEMORIAL | PRIMARY

OBJECTIVE CATEGORY	AIRPORT OBJECTIVES (SPECIFIC TO ROLE)		CURRENT PERFORMANCE	RECOMMENDATION	COST
AIRSIDE FACILITIES					
Primary Runway Length	Future Runway Length from ALP/MP (7,550 feet)		7,550 feet	None	$-
Primary Runway Width	100 feet		100 feet	None	$-
Primary Runway Strength	Single-Landing Gear (60,000 pounds)		65,000 pounds	None	$-
Primary Taxiway	Full Parallel		Full Parallel	None	$-
Instrument Approach	Precision or PBN		Non-Precision, PBN	None	$-
Visual Aids	Rotating Beacon, Lighted Wind Cone, PAPIs/VASIs, ALS, REILs (as applicable based on ALS), as appropriate		Rotating Beacon, Lighted Wind Cone, Wind Cone, VGSI	None	$-
Runway Lighting	MIRL, HIRL Desired		HIRL	None	$-
Weather Reporting	ATCT, ASOS or AWOS		ATCT, On-Site ASOS or AWOS	None	$-
LANDSIDE FACILITIES					
Commercial Terminal	Yes		Yes	None	$-
General Aviation Terminal	Yes		Yes	None	$-
Public Restrooms	Yes		Yes	None	$-
Conference Rooms	Yes		Yes	None	$-
Pilots Lounge	Yes		No	Pilot Lounge	$100,000
Hangar Storage Units	Storage for 80% of Based Aircraft and 25% of Transient	129	102	Add 27 spaces	$6,845,000
Apron Tie-Down Spaces	20% of Based Aircraft and 50% of Transient	38	57	None	$-
Perimeter Fencing	Full Perimeter		Full	None	$-
Auto Parking	Present On-Site		Yes	None	$-
SERVICES					
Cell Phone Coverage	Yes		Yes	None	$-
Wi-Fi	Yes		Yes	None	$-
Fixed Base Operator	Yes		Atlantic Aviation	None	$-
Maintenance Services	Yes		Yes	None	$-
Snow Removal Equipment	Yes		Yes	None	$-
Fuel	24/7 AvGas, 24/7 Jet A Fuel		24/7 AvGas, 24/7 Jet A Fuel	None	$-
Rental/Courtesy Car Access	Rental Car		Rental/Courtesy Car	None	$-
FUTURE STORAGE NEEDS, PAVEMENT NEEDS, AND ADDITIONAL ISCIP PROJECTS					
PROJECT CATEGORY					
Performance Measure: Master Plan or Airport Layout Plan (ALP)				None	$-
Performance Measure: Close-in Obstructions				None	$-
Performance Measure: Meeting Current FAA Taxiway Design Standards, As Feasible				None	$-
Future Storage Needs: Hangar Spaces				51	$12,515,000
Future Storage Needs: Apron Tie-downs				8	$450,870
Pavement Lifecycle Costs					$24,687,853
Replacement Airport Cost*					$332,000,000

**Note: The airport is committed to pursuing the dual path approach described in the City of Hailey and Blaine County guiding principles by accommodating demand at the current airport site while conducting planning-level analyses for potential future airport relocation.*

SUN

Economic Benefit to Idaho

The 2020 Idaho Airport Economic Impact Analysis (AEIA) Update quantified the total economic activity of each airport in the Idaho system. The study first calculated the direct economic benefits attributable to on-airport activity, capital improvements, and off-airport visitor spending. Based on these direct impacts, indirect and induced (or "multiplier") effects associated with supplier purchases and the re-spending of worker income were then calculated. Direct impacts and multiplier effects are summed to determine the airport's total economic impacts. Impacts are expressed in terms of jobs, earnings, contribution to the state's Gross Domestic Product (GDP), and total output. GDP is the value contributed to a product or service provided by a firm or group of firms (in this case, airport business). In addition, airports support a variety of other benefits, such as agriculture, wildland firefighting, medical transport, and business operations across the state.

STATEWIDE IMPACTS	
Total Employment	33,460 jobs
Total Earnings	$1.3 billion
Total GDP	$2.4 billion
Total Output	$4.9 billion

Overall, the statewide impact of aviation for Idaho's economy exceeds **$4.9 billion** and provides benefits through diverse activities associated with aviation and airport activity.

AIRPORT-SPECIFIC IMPACTS

TOTAL EMPLOYMENT	TOTAL EARNINGS	TOTAL GDP	TOTAL OUTPUT
3,020 JOBS	$94,400,000	$176,800,000	$291,100,000

TIMELINE OF ECONOMIC IMPACT

2008 Economic Impact
Total Employment - 1,550
Total Earnings - $39.1 million
Total Output - $119.7 million

Enplanements - 67,469
Nonstop Destinations - 5
Based Aircraft - 150
Annual Operations - 50,712
2007 Activity

2018 Economic Impact
Total Employment - 3,020
Total Earnings - $94.4 million
Total Output - $291.1 million

Enplanements - 84,071
Nonstop Destinations - 5
Based Aircraft - 159
Annual Operations - 24,144
2017 Activity

2008 | 2009 | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019

Runway Rehabilitation
Pavement Maintenance

Airport Relocation
Airport Planning

Taxiway and Apron Rehabilitation
Pavement Maintenance

Delta and United Introduce Regional Jet Service
Air Service Development

Taxiway Reconfiguration and Terminal Remodel (Safety Areas)
Airside Development/Safety

Airport Master Plan Update
Planning Study

New Airport Entrance Road
Landside Development

Land Acquisition for Approaches
Safety

Airport Economic Impact Indices *Airport Activity Components* *Planning Considerations* *Development & Improvements*

LAND USE COMPATIBILITY

Incompatible land use on and around airports can result in noise-related nuisance or safety-related concerns affecting airspace, overflights, and accident severity. Incompatibility has the potential to limit airport operations, close airports, or restrict access. Most recently, Idaho Code 67-6508(q) (Section Q) established new requirements for cities and counties to prepare a Public Airport Facilities section in their comprehensive plans. The Public Airport Facilities section must provide an overview of nearby airport facilities, operations, airport development, and economic impact. Section Q is an important step towards supporting compatible land uses around airports.