



2023 ARIZONA GOVERNOR'S
CONFERENCE ON TOURISM

ARIZONA
OFFICE OF TOURISM

Flagstaff Pulliam Airport Updates

Brian Gall, Airport Director

July 10, 2023



FLAGSTAFF AIRPORT

GRAND DESTINATIONS

About FLG - Flagstaff Pulliam Airport



FLAGSTAFF AIRPORT
GRAND DESTINATIONS



Flagstaff Pulliam Airport



History

- 75th Anniversary in 2023
- Constructed in 1948 for less than \$50k

Current Operations

- Owned and operated by the City of Flagstaff
- Non-hub, primary commercial air service and general aviation
- American Airlines service to PHX and DFW
- Airfield elevation – 7,014 ft.
- Closest commercial service airport to the Grand Canyon and Sedona
- 100 inches of snow annually



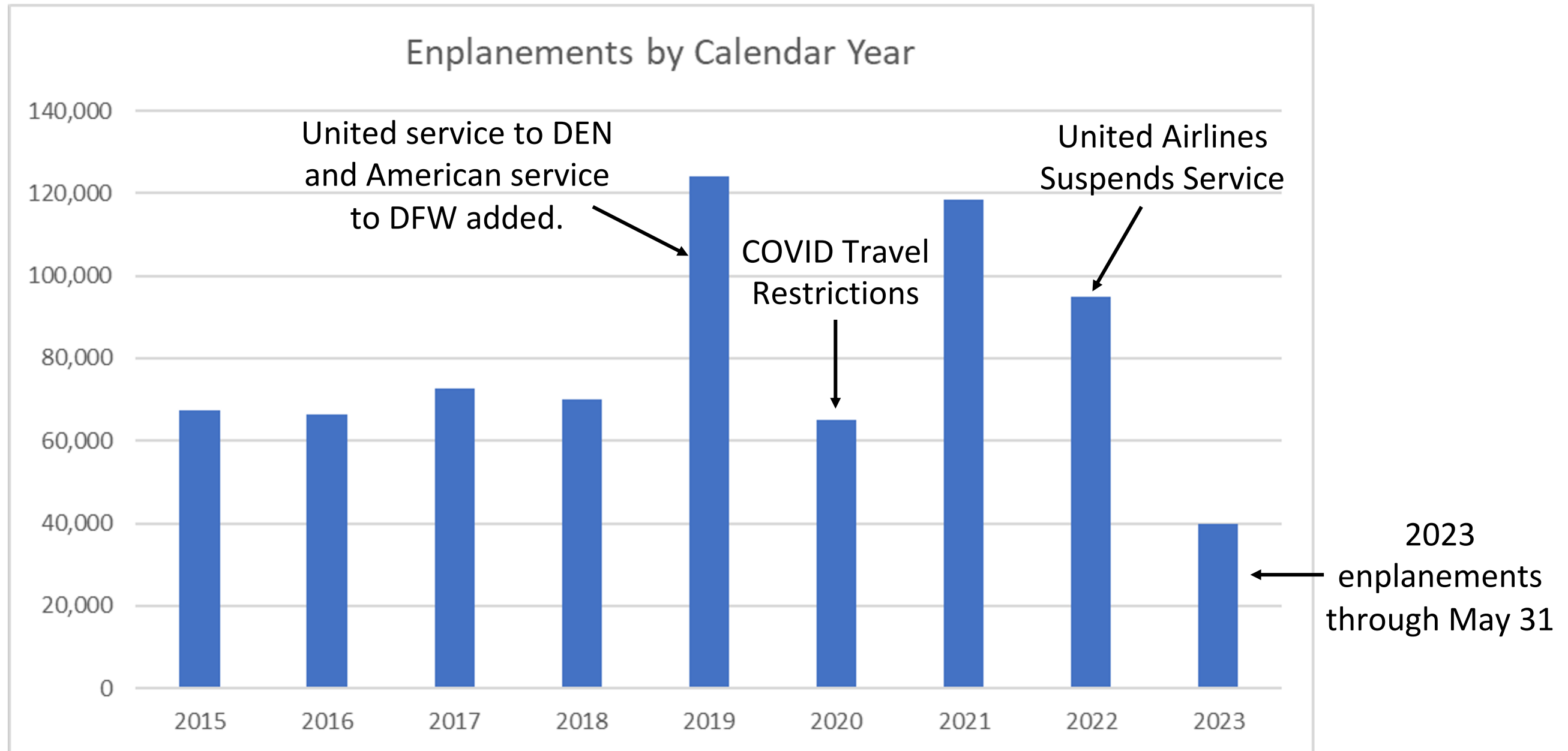
Recent Trends



FLAGSTAFF AIRPORT
GRAND DESTINATIONS

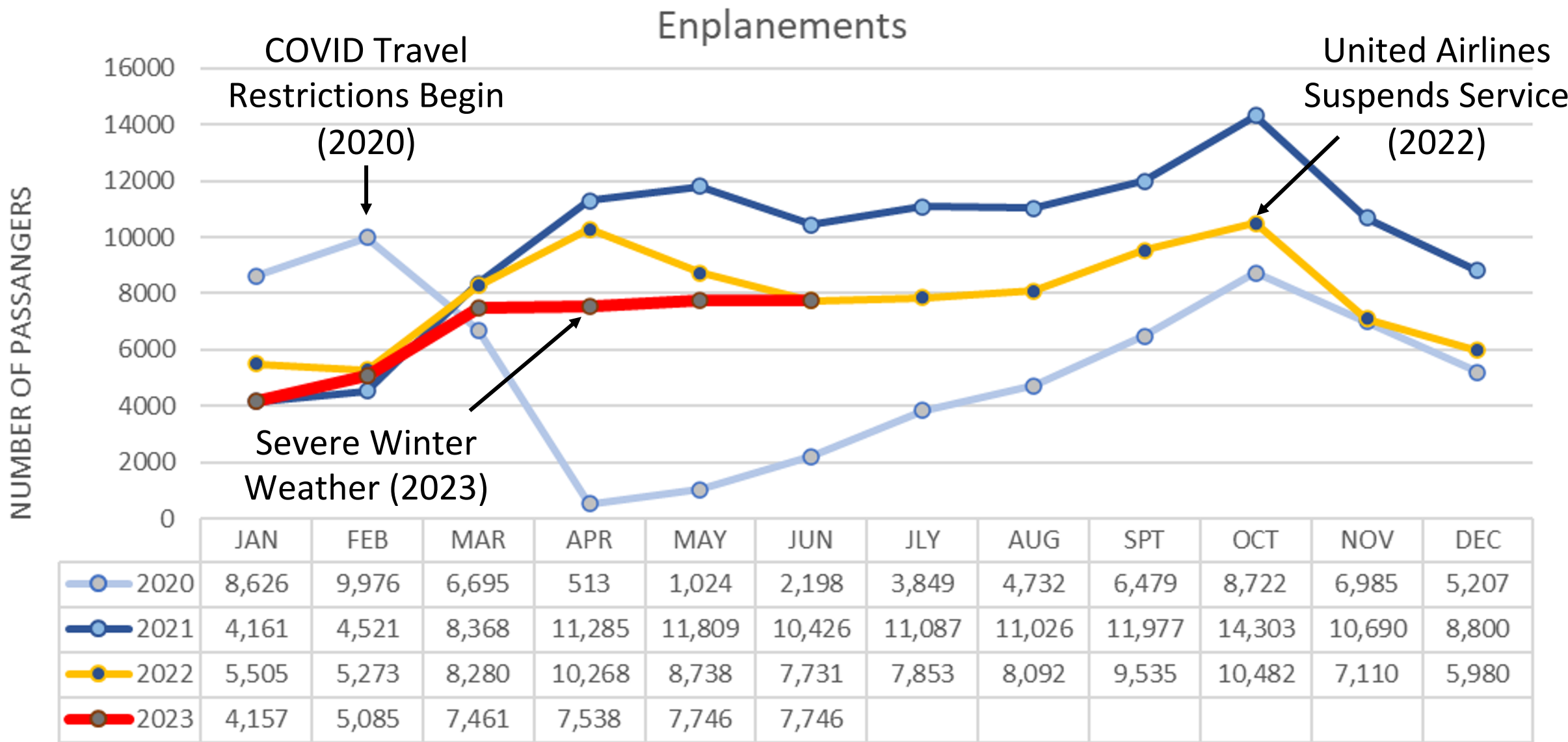


Annual Enplanements





Monthly Enplanements



Air Service Development



FLAGSTAFF AIRPORT
GRAND DESTINATIONS



Air Service Development



Regional Airport Challenges

- Pilot shortage
 - COVID
 - Retirements
 - New regulations
- Industry Changes
 - Fewer flights
 - Larger aircraft
 - Higher load factors
 - (United Airlines FLG-DEN service averaged 88% load factor in their last 6 months of operations)
 - Airline pilot training programs



NEWLY RELEASED DATA SHOWS AIR SERVICE CRISIS

76% of US airports have lost air service; average loss is 31%



AIRLINES

Airlines' answer for congested airports and rising costs: Bigger planes

PUBLISHED THU, APR 6 2023 7:00 AM EDT | UPDATED THU, APR 6 2023 4:25 PM EDT

The Dallas Morning News

BUSINESS > AIRLINES

American Airlines CEO says it can't deploy 150 regional jets because of pilot shortage



FORBES > BUSINESS > AEROSPACE & DEFENSE

The 1,500-Hour Rule Has Broken The Pilot Pipeline In The U.S.



Air Service Development



Air Carrier Recruitment Efforts

- Air Service Development Conferences
 - Airport Roundtable Series
 - Jumpstart Conference
- Passenger Demand Analysis
- Air Carrier Incentive Policy Update
- Airport Infrastructure Upgrades
 - Airline Office Remodel
 - Passenger Hold Room Expansion
- Advertising campaigns - Fly local!

2023 Airline Attendees



Thank you!



FLAGSTAFF AIRPORT
GRAND DESTINATIONS



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PHOENIX SKY HARBOR INTERNATIONAL AIRPORT

Chad Makovsky, C.M.
Director of Aviation Services



PHX DVT EYR

ARIZONA'S LARGEST ECONOMIC ENGINE

\$106M Daily



1,200+
Aircraft arrive
and depart

120,000
Passengers each day



**Nonstop
International Flights
\$3.4 Billion/year**

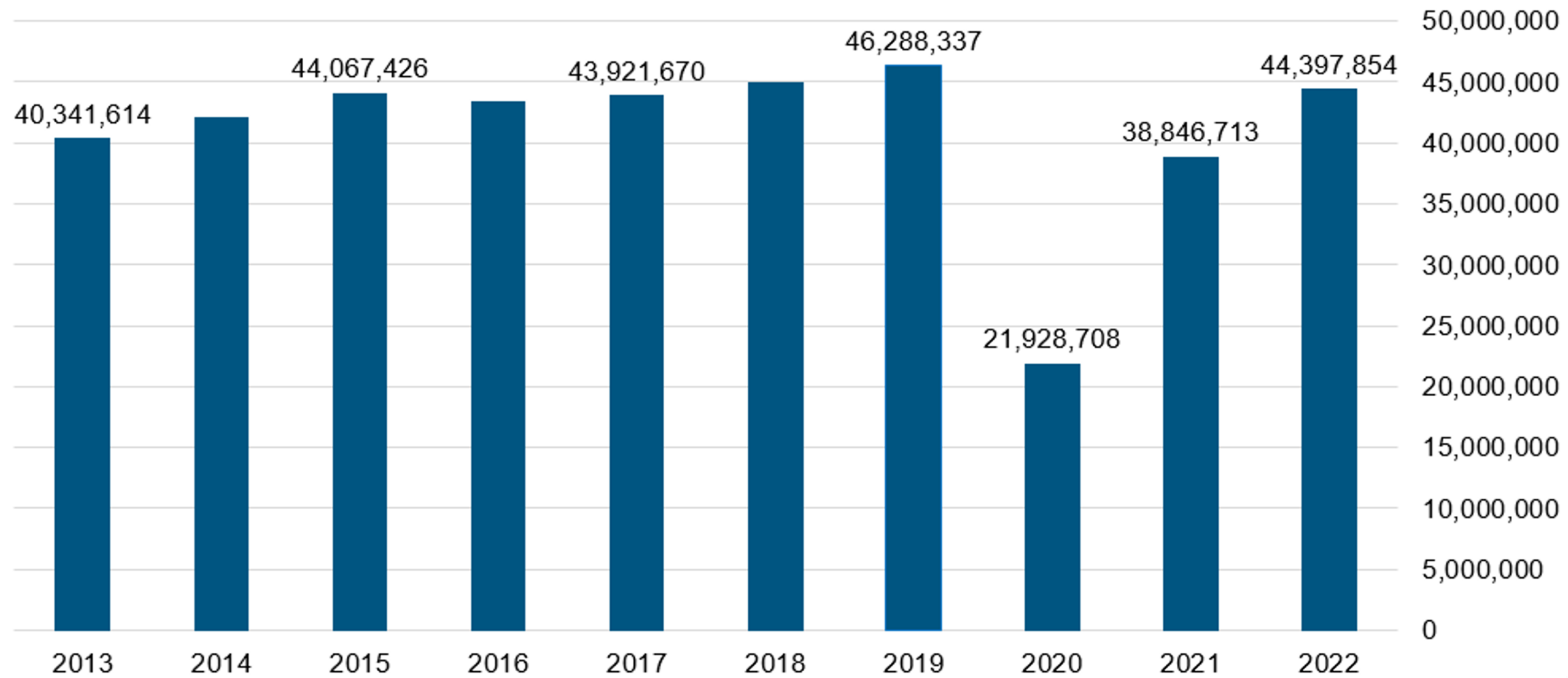
More than



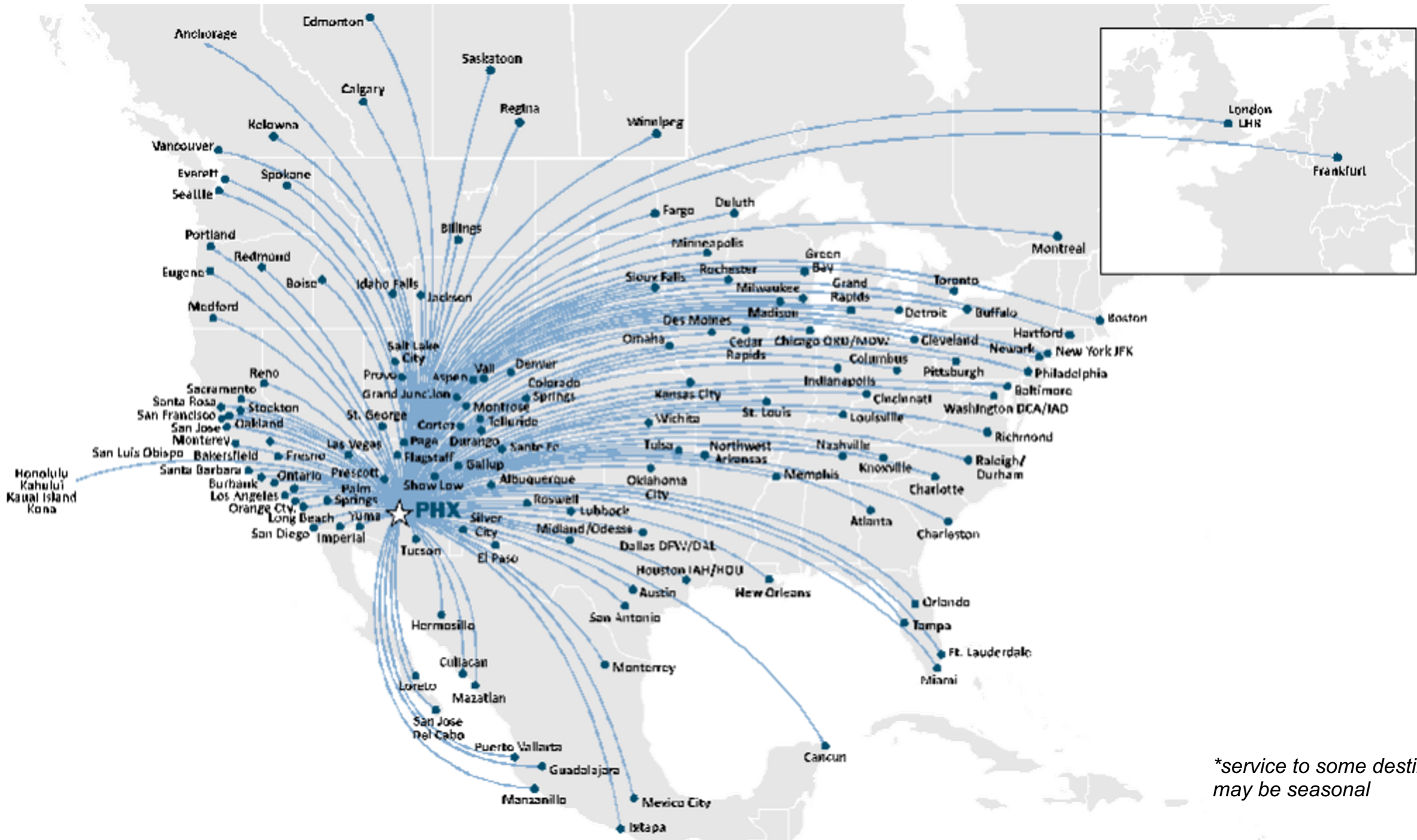
57,000 Jobs

PASSENGER ACTIVITY

Year-Over-Year Passenger Data - 2013 - 2022

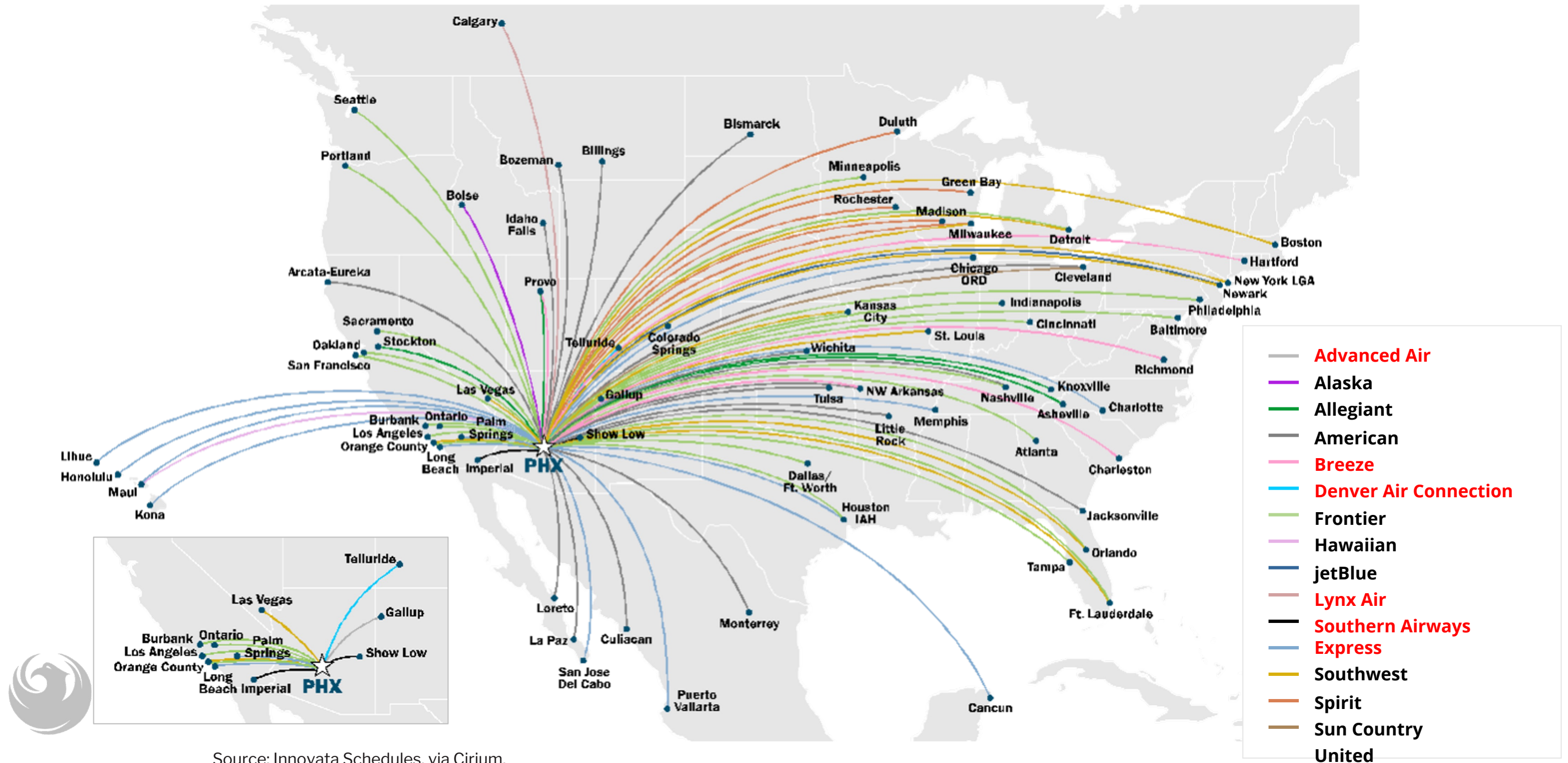


OVERALL SERVICE AT PHOENIX CONSISTS OF 543 AVERAGE DAILY DEPARTURES TO 141 NONSTOP DESTINATIONS



**service to some destinations
may be seasonal*

EVEN DURING THE PANDEMIC, FIFTEEN AIRLINES HAVE ADDED EIGHTY-SIX NEW MARKETS – INCREASING ACCESS AND COMPETITION



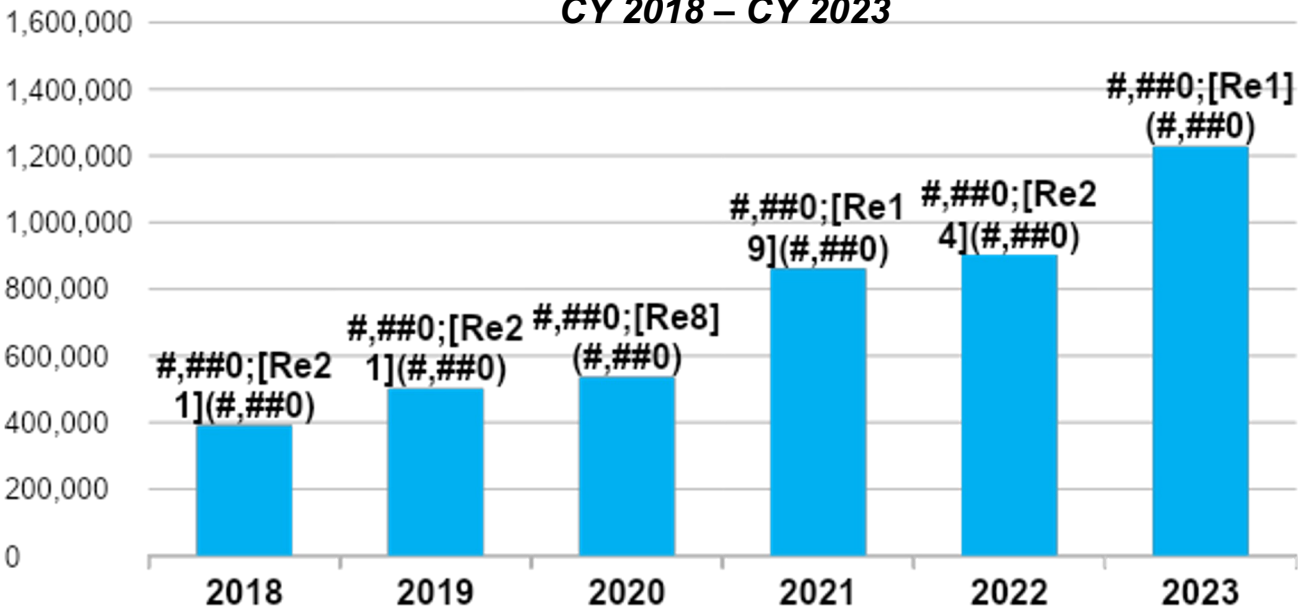
Source: Innovata Schedules, via Cirium.

FRONTIER NEW PHX CREW BASE



Frontier's Annual Seat Departures from PHX

CY 2018 – CY 2023

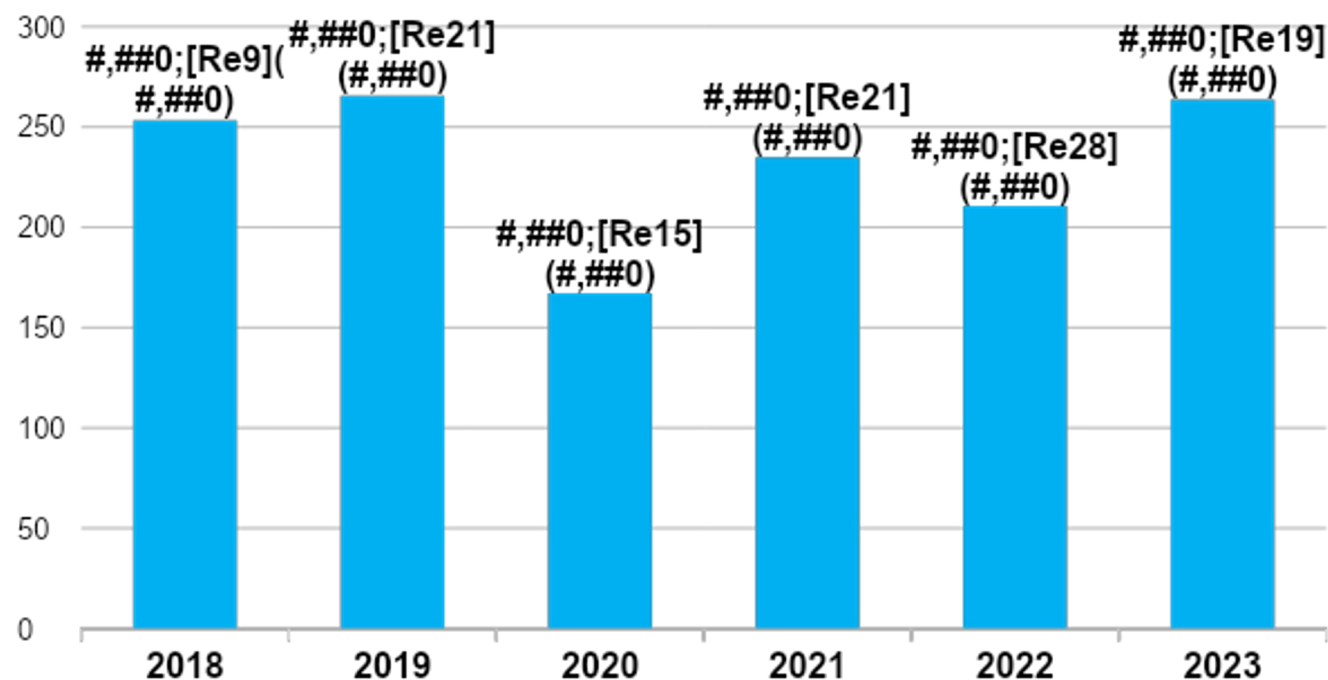


FRONTIER
AIRLINES

THE AMERICAN AIRLINES PHX HUB IS GROWING SIGNIFICANTLY THIS WINTER

American Airlines Winter Season Average Daily Departures from PHX

December 2018 – December 2023



- American's winter daily departures are increasing 25% from last year
- American's service from PHX will be effectively back to pre-covid levels (2019)
- Phoenix will be American's 5th largest hub this winter, up from 6th in 2022
- Two new AA markets will be added this winter; Jacksonville, FL and Wichita



WHAT CAN YOU DO? CONNECT WITH US AND SHARE!

skyharbor  m /PhxSky  rbor
@PHXSkyHarbor





ARIZONA GCOT

DESTINATION
INSPIRATION

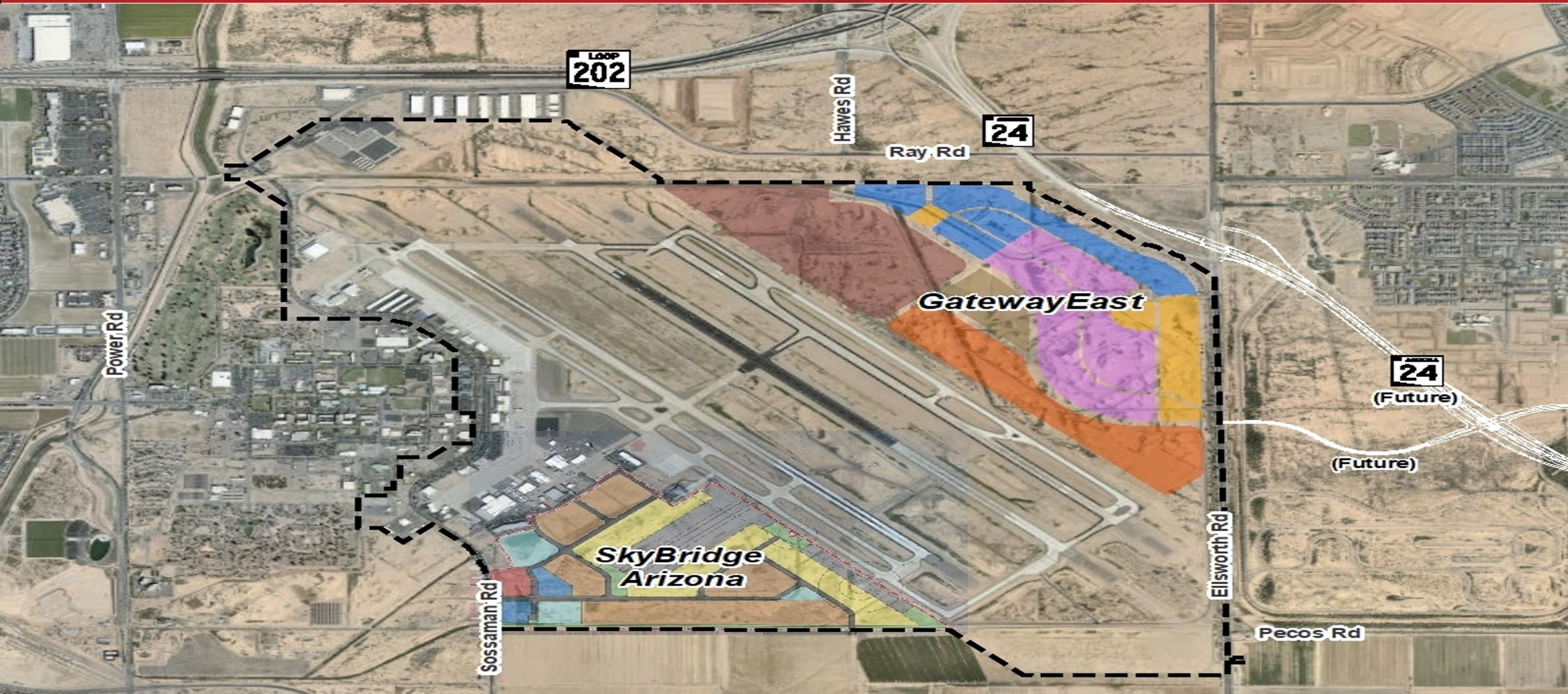
2023



Arizona Governor's Conference on Tourism

July 11, 2023

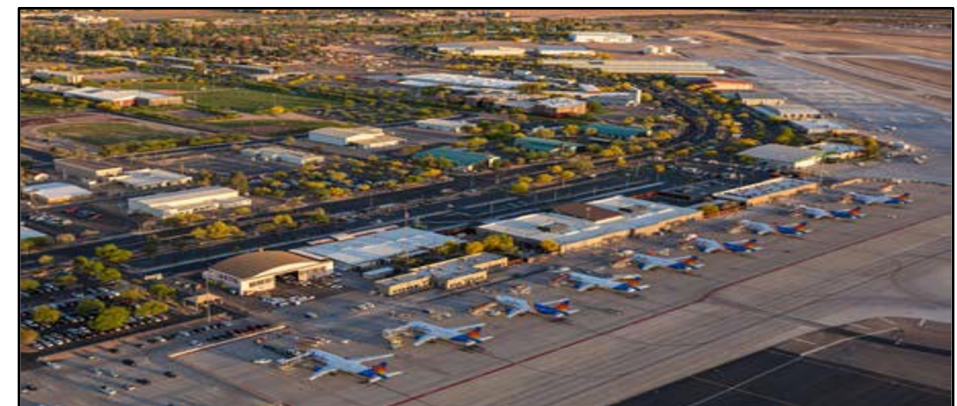
Phoenix-Mesa Gateway Airport



Gateway Airport Overview

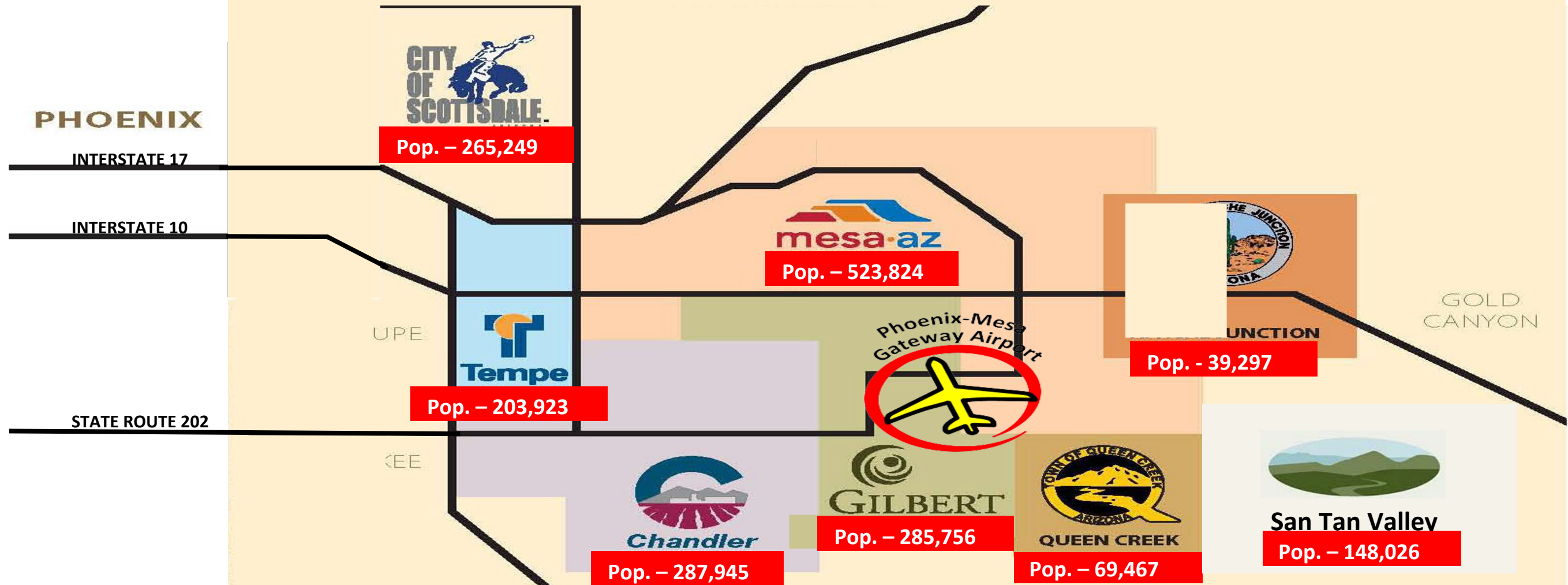


- Located in the fastest growing region of greater Phoenix with more than two million people living within a twenty-minute drive
- Easy access – Located adjacent to two major highway systems
- Record-setting passenger activity in 2022
- Two Airlines offering more than 45 nonstop destinations across the U.S.
- Allegiant Alliance



Growing Phoenix East Valley

Phoenix East Valley Population Nearing Two Million



2021 Economic Impact Study



\$829.4M - On-Airport Activities



\$241.2M – Visitor Spending



10,244 – Full Time Persons Employed



\$524.2M – Total Compensation Paid to Workers

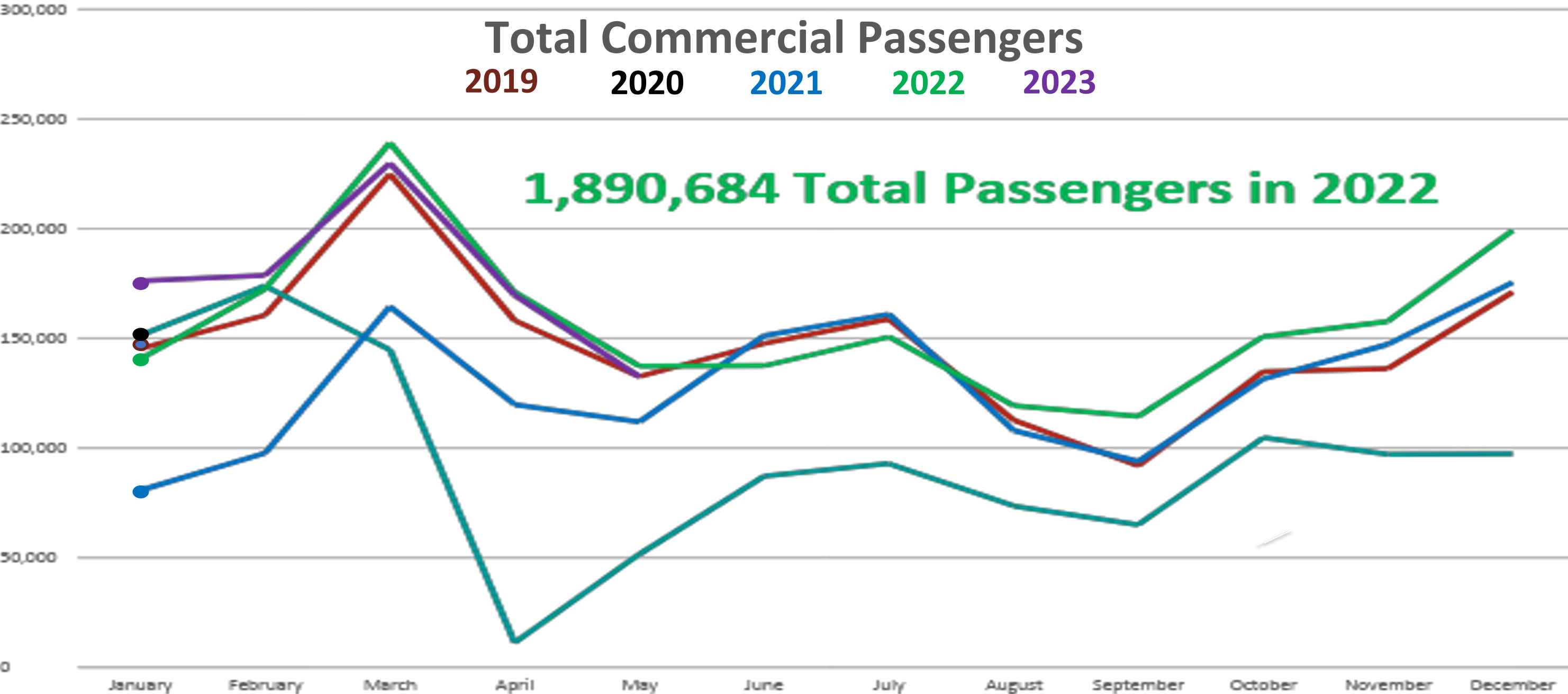


\$1.8B – Economic Activity Attributable to Airport

Nonstop Route Map



Commercial Passenger Activity



Five-Gate Terminal Addition



Five-Gate Terminal Addition



DWL ARCHITECTS+

Five-Gate Terminal Addition



DWL ARCHITECTS+



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TUS Trends

Arizona Governor's Conference on Tourism

Austin Wright
Chief Communications Officer

TUCSON INTERNATIONAL AIRPORT

3.7

Million Passengers

60

Peak Daily Departures

19

Nonstop Destinations

10%

Growth in 2023



TUCSON INTERNATIONAL (TUS)



Ten routes already surpassed 2019

But 40% leakage to PHX/AZA, even inbound

Larger aircraft

Leisure boost during pandemic

Seasonality: 30%

DMO's AND AIR SERVICE DEVELOPMENT



Instrumental in building awareness in
originating markets

Funding sources outside airport system

Can market destination, not just the
route

Visit Tucson: staff and resources

Main competitors: PHX, PSP, Mexico
beach

AIR SERVICE DEVELOPMENT POST-PANDEMIC



Leisure travel to open spaces
spiked, but has settled down

Which new services are
sustainable?

US has recovered overall, but
business travel still reduced

Traveler mix and behavior
changed permanently

EVERETT*

SEATTLE

PORTLAND*

MINNEAPOLIS*

CHICAGO O'HARE

CHICAGO MIDWAY

SALT LAKE CITY

PROVO

DENVER

SAN FRANCISCO

LAS VEGAS

PHOENIX

LOS ANGELES

ORANGE COUNTY

SAN DIEGO

TUS

ATLANTA

DALLAS/FT. WORTH

DALLAS LOVE FIELD

HOUSTON INTERCONTINENTAL

HOUSTON HOBBY

*SEASONAL

NONSTOP
FOR TUCSON

NONSTOP
FOR TUCSON

THANK YOU!

Q&A SESSION

Austin Wright
Chief Communications Officer



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