The purpose of this report is to provide input into the FY13-17 strategic planning process for the Reno-Tahoe Airport Authority.

- The following feedback represents input from 7 areas that influence the Reno-Tahoe Airport Authority collected in February 2013.
- This summarized input will help guide the strategic planning process going forward for the RTAA.
- These are not decisions or recommendations.

**Report Overview:**

- Section 1 is the Executive Summary, which is a high-level view of the following area reports.
- Section 2 includes the Stakeholder Survey results, collected via an electronic survey sent out to gather input from airport stakeholders.
- Sections 3-8 are based upon 6 separate stakeholder groups that play major roles within the airport. Separate meetings took place per group to solicit input related to priorities, trends, strengths, areas for improvement and the future direction of the RTAA.
Increasing air service takes a collective, united community-wide effort to create demand - the airport alone cannot change the level of air service.

All users of the airport - public, cargo and GA - together make a vibrant, healthy airport for the region.

Continual change in the aviation industry coupled with the regional economic uncertainty requires the RTAA to be flexible, agile and responsive to changing needs.

Providing a safe and secure environment as well as remaining financially stable are key foundational elements that must be preserved and sustained.

The airport is viewed as an engine that is critical to the economic development of the region.
## Industry and Regional Trends to Watch

<table>
<thead>
<tr>
<th>Industry</th>
<th>Community/Regional</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Constant Change in Aviation Industry</td>
<td>• Limited Service to Bay Area</td>
</tr>
<tr>
<td>• Air Service Consolidation</td>
<td>• Increasing value/demand for the area coupled with lower access - less Airlift</td>
</tr>
<tr>
<td>• Macro-Economic Change</td>
<td>• Shift in demand from Tourism to Business Travel</td>
</tr>
<tr>
<td>• Rising Cost of Fuel</td>
<td>• UNR transition/Mt. West</td>
</tr>
<tr>
<td>• Security Requirements</td>
<td>• Major Event Opportunities</td>
</tr>
<tr>
<td>• Changes in Route Structure</td>
<td>• California Tax/Nevada Business Appeal</td>
</tr>
<tr>
<td>• Technology Evolution</td>
<td>• Aviation Tax/Abatements</td>
</tr>
<tr>
<td>• Stakeholder Engagement and Partnerships</td>
<td>• Rising Cost of Air Fare</td>
</tr>
</tbody>
</table>

DRAFT as of February 25, 2013
### What is Going Well and What Needs Improvement

<table>
<thead>
<tr>
<th>Going Well</th>
<th>Needs Improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Health/Stability</td>
<td>Marketing beyond the West Coast</td>
</tr>
<tr>
<td>Transparency</td>
<td>Economic development around the airport</td>
</tr>
<tr>
<td>Relationships with Airlines</td>
<td>Stronger <em>regional emphasis</em> in the area of economic development and brand awareness</td>
</tr>
<tr>
<td>Flexibility/Agility</td>
<td>Communication with stakeholders on projects and critical issues</td>
</tr>
<tr>
<td>Safety and Security</td>
<td>Community outreach</td>
</tr>
<tr>
<td>Customer Service/Traveler Experience</td>
<td>Attracting and retaining GAs and FBOs</td>
</tr>
<tr>
<td>Functionality/Efficiency</td>
<td>Increasing hangar space and amenities</td>
</tr>
<tr>
<td>Parking</td>
<td>Communication/Synergy with GA</td>
</tr>
<tr>
<td>Location/Everything in Close Proximity</td>
<td>Stead Awareness/Marketing</td>
</tr>
<tr>
<td>Relationship with TSA</td>
<td>Capital Improvement budget</td>
</tr>
<tr>
<td>Concessions</td>
<td>Facilities for the disabled</td>
</tr>
<tr>
<td>Facility enhancement and appearance</td>
<td>Lack of Infrastructure related to Stead Development</td>
</tr>
<tr>
<td>Maintenance of Facilities</td>
<td>Consider location of slot machines in middle of concourse</td>
</tr>
<tr>
<td>Excellent Runways</td>
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<tr>
<td>Listening to GA and corp. aviation owners</td>
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<tr>
<td>Communicating with the community</td>
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<tr>
<td>Marketing of New Flights</td>
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<td>DRAFT as of February 25, 2013</td>
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</tbody>
</table>
Top three priorities from across all the group are 1) Air Service, 2) Financial Health, 3) General Aviation.
## Priorities by Group

<table>
<thead>
<tr>
<th>Group</th>
<th>Priorities</th>
</tr>
</thead>
</table>
| **Stakeholder Survey**                     | • Support all aspects of General Aviation  
• Enhance and maintain Air Service  
• Pursue Economic Development at Reno-Tahoe International Airport  
• Maintain the Financial Health of RTAA |
| **RTIA User Group**                        | • Support all aspects of General Aviation  
• Enhance and maintain Air Service  
• Provide enhanced Customer Service |
| **Stead User Group**                       | • Pursue Airport Economic Development at Stead  
• Support all aspects of General Aviation  
• Strengthen Community Outreach within our community |
| **Airline Affairs Committee**              | • Maintain Financial Health of the Airport/Low Cost Structure  
• Pursue Economic Development Opportunities at RTIA and Stead  
• Maintain/Enhance Customer Service |
| **Air Service Task Force**                 | • Enhance and Maintain Air Service  
• Expand and Develop Cargo Development  
• Pursue Economic Development Opportunities at RTIA and Stead |
| **Citizen Outreach Committee**             | • Enhance and Maintain Air Service  
• Cargo Development  
• Maintain the Financial Health of RTAA |
| **RTAA Staff**                             | • Financial Health/Sustainability  
• Safety and Security  
• Customer Service/Relations  
• RTAA Org/Culture |
**Enhance and Maintain Air Service (expansion of flights and carriers)**

*Intent:* Be proactive to maintain and expand service where possible through a community-wide effort to increase demand.

*Possible Goals:*
- Create demand through a community coordinated effort and engage businesses collaboration. (Ex: Ticket Banks and companies to pre-purchase tickets for frequent destinations)
- Expand marketing efforts to the East Coast.
- Support existing service by focus efforts on adding more passengers/filling the planes before additional frequency.
- Stronger partnership with RSCVA to market region across the country that will package the destination “in total”.
- Seek demand from Mexico & Canada to increase International Air Service.
- Incentives- focus on Incentives.
- Lobby to pass Aircraft Parts Tax.
- Lobby State because Reno needs a “lift” if State could provide some help to get the Middle going (Reno) the whole state would be thriving.
- Improve the experience through more food and shopping facilities make a more enjoyable experience.
**Intent:** Remain financially secure and flexible/agile in order to react to constantly changing needs of the industry. The RTAA is so well positioned; important to maintain financial health and keep cost structure low.

**Possible Goals:**

- **Maintain Stability:** Continue to manage debt and maintain financial positioning - enabling the airport to remain nimble/flexible and react quickly to the changing needs of the industry.

- Continue to **maintain a high level of transparency** as it relates to finances, etc. - this is something that the airlines values greatly.

- **Maintain low cost structure.**

- **Build Smart, Don’t Over Extend:** Be mindful as we consider master planning and future facilities development. Ensure there is an established/forecasted need - taking a smart approach to master planning, etc.
Support All Aspects of General Aviation

Intent: Cultivate a Vibrant GA Community, cultivate as a partner to drive economic development and regional growth.

Possible Goals:
- Create the demand; make it inviting for GA - a place they want to be vs. the place they have to be.
- Variety of FBO’s in Reno and Stead - should have 2 competing FBO’s.
- Attractive GA Terminal Facility at Reno.
- Improved communication with GA to feel part of aviation; part of the team and organization at large.
- User Fees: Collectively address as a united front.
- Bring in New Pilots: Provide pathways, programs, education; educate youth to pursue careers in aviation such as flight Schools at the Airport.
- Fill up the hangars in Reno.
Provide Enhanced Customer Service

*Intent:* Continue to enhance the whole customer experience from “curb to gate” by taking a well rounded approach from the customers’ perspective.

*Possible Goals:*
- **Create “The Betty Effect”** - hospitality that comes along with feeling welcomed to all customers that “touch down” at the airfield.
- **Continue to enhance the whole customer experience** including improvements to retail and dining.
- **Maintain a positive relationship/interaction with TSA** to ensure a good customer experience overall.
Intent: Strong growth and focus on cargo development has multiplying effects on growing air service and economic development, leveraging a key competitive advantage of our region.

Possible Goals:
- **Positioning Sparks/Reno/Tahoe as distribution center** - critical to have a great cargo network system.
- **Community/Business Groups to Carry the Message** - key issue** (We need more community groups carrying the message; spread the need/desire that the demand exists).
- **Tout our successes** - make sure the rest of the world knows about our “wins”.
- **Cargo from China** is an opportunity- emerging giant in economy.
- **Positioning Sparks/Reno/Tahoe as distribution center** - critical to have a great cargo network system.
- **Leverage our natural advantage** - logistically better positioned than many other West Coast Regions.
Pursue Airport Economic Development at Reno-Tahoe International airport

**Intent:** Economic development with and around the airport is key to our future economic vitality.

**Possible Goals:**
- A broader strategy for the Reno-Tahoe area at large.
- Clarify RTAA’s role within the community as it relates to economic development (How does it fit? How does it compliment? How does it compete?)
- We have a lot of land that is under-utilized; Improve utilization of the airport. (Air service; Cargo; GA are the 3 things that contribute to this)

*Note: Many ideas regarding economic development are included in other areas such as cargo development and air service.*
Pursue Airport Economic Development at Reno Stead Airport

**Intent:** Balanced economic development to increase Stead utilization for aviation related activities with maintaining the qualities valued by the Air Races.

**Possible Goals:**

- **New Terminal:** Leverage and promote the new terminal to increase economic development.
- **Make Stead Attractive to Pilots:** Hangars, Access, Food, Terminal, Transport, Flight Planning Room, improve the old hangars on West End.
- **Attract new businesses** on the Air Field.
- **Development of Adjacent Land & Commercial Development:** Evolution of business around the properties; *build an economic engine centered here.*
- **Promote the Airport: Attract Community:** Events, Museum, etc. and create bigger Airport Signage.
- **Marketing and Construction of Hangars:** Need to focus on Marketing and Construction of Hangars at West End.
- **Stead/Drone Development Potential:** Stead is a perfect place for commercial and private development.
Intent: Public safety and security is always a #1 focus for RTAA.

- After tragedy at air races; *if you are not prepared for what you expect will not happen - you can never recover.*
- From internal airport perspective - this drives so much of what we can and cannot do - from Federal Mandates, etc.

Possible Goals:

- Maintain/Develop Infrastructure and facilities based on responsiveness to the Market.
- Continue to be responsive to changing needs/mandates related to security.
- Maintain a good relationship with TSA (also tied to customer service).
Intent: “Build Smarter not Bigger” ensuring there is an established/forecasted need and maintain the high standards and maintenance levels of facilities.

Possible Goals:

- Responsiveness to the Market: Expand and contract with market forces. (Efficiency Model: Optimize or downsize vs. expand based on the market)
- Developing the airport in accordance with the Master Plan and using that plan to provide the best possible user environment is key to both budget and service. Without a Master Plan it is difficult to coordinate efforts.
- Infrastructure at Stead, specifically the hangars on the West End.
Intent: The Airport is or at least should be the life blood of the tourism industry here in Northern Nevada and should facilitate tourism within the community and not compete with it.

Possible Goals:

- Proactive Marketing Campaign; we want to bring people in.
- Brand awareness helps the community and the community to help the airport - they reinforce each other.
- Marketing efforts could be combined with other local agencies to maximize effectiveness in an effort to focus on expansion to new markets.
- We need a tag line and/or slogan.
*Intent:* Expand community outreach to increase regional understanding of the airport’s purpose and all it has to offer.

*Possible Goals:*

- Hold public events that demonstrate the use and purpose of the Stead Airport - gain more public support and awareness.
- Continue to develop community/business relationships to increase awareness around airport activities, direction, etc.

*Note:* Many ideas regarding community outreach are included in other areas such as cargo development and air service as the specific means to achieving these priorities.
Continue being *Flexible and Agile*: Manage the airport around constant evolution/change in the industry - not ignoring potential shifts that could come about; remain flexible and prepared to react.

Continue to provide professional development, staff growth and succession planning as part of the culture.

*Note: Refer to the Staff Input Section related to mission and vision for more detail on this priority.*
Foster Additional Plans and Policies to Promote Environmental Sustainability

*Intent:* Continue to promote environmental sustainability as part of the overall strategy to maintain an efficient, effective airport operation.

- Environmental sustainability is encompassed in the notion of financial health and running an efficient, effective operation.
Section 2

STAKEHOLDER SURVEY
General Aviation, Air Service and Reno/Tahoe Economic Development are the top three priorities from the stakeholders at large.

# of Participants: 90

DRAFT as of February 25, 2013
General Aviation is a priority because it supports the economy, influences image/perception of airport and brings local jobs.

- General Aviation service supports the economy.
- GA brings/supports local jobs.
- Brings revenue to our area through money spent on sports, entertainment, business, etc. in the Reno/Tahoe area.
- Little has been done to support GA in the last several years.
- Image and perception of airport is influenced by their allowance to work with GA.
- Local businesses are reliant on the ability to have GA.
- GA aids in the financial sustainability of the airport.

Comments

- “General Aviation is also a key to bringing jobs and revenue to our area.”
- “GA traffic is a majority of the traffic at RTIA and should be embraced.”
- “General aviation should be encouraged because of the contributions it makes to our areas economy as well.”
- “It Enhances the image of Reno. Providing a welcoming environment to pilots/people who want to travel here by private plane leaves a great impression.”

DRAFT as of February 25, 2013
Enhance and Maintain Air Service is a priority because it contributes to regional economic development and financial sustainability.

- Quality air service is an important key to economic development & maintaining the local economy.
- Healthy air service will support financial sustainability.
- Local businesses rely on the ability to travel in and out of Reno/Tahoe area.
- Increase air service will increase tourism.

Comments

“For Reno Tahoe to be successful as a four season destination resort, people need to be able to get here.”

“Healthy air service = financial stability.”

“Economic growth will partially hinge on the ability of owners and employees to travel to various destinations without undue hassle or delay.”

“Air service is an important ingredient to economic development.”

DRAFT as of February 25, 2013
Pursuing Airport Economic Development at RTIA is important because it contributes to the overall health of the regional economy.

- The development is crucial to the health of the local economy.
- RTIA development will bring more jobs to the area.
- The RTIA is an economic engine for Northern Nevada.
- Development of the RTIA and surrounding areas will support the local economy.

Comments

“The need to build and develop air travel in and out of the Reno-Tahoe area is crucial to the economic health of this community.”

“The RTAA is an economic engine for northern Nevada and that has to be its primary focus.”

“Bringing more jobs to North West Nevada.”

“Northern Nevada needs addition Business Diversification, growth and employment.”
## What is Going Well and What Needs Improvement

### Going Well
- Facility enhancement/expansion and appearance (19)
- Functionality (5)
- Financial responsibility and management (5)
- Customer service (5)
- Listening to GA and corporate aviation owners (3)
- Communicating with the community (3)
- Safety and security (3)

### Needs Improvement
- Attracting and retaining GAs (18)
- Attracting and retaining FBOs (6)
- Communication with stakeholders and tenants and projects and critical issues (5)
- Community outreach (3)
- Focusing on resources outside of the airport terminal area (3)
- Increasing the facilities (3)
- Enhancing marketing efforts (3)
- Increasing hangar space and hangar amenities (3)

Numbers represent frequency a theme was stated.
Additional Comments

- Attracting more carriers & flight frequency.
- Staying on the correct path/direction.
- Happy to have input considered.
- Need to promote living in the Reno/Tahoe area.

Comments

“STAY on course. We have a GREAT airport.”

“RTIA is a nice airport with friendly and helpful ATC staff.”

“Krys Bart has been a tremendous asset for the region - she will be missed.”

“It's all about balance and serving the entire community. I think the RTAA becomes a bit too entrepreneurial at times.”
General Aviation, Air Service and Customer Service are the top three priorities from the RTIA User Group Committee.

# of Participants: 12

DRAFT as of February 25, 2013
Cultivate a Vibrant GA Community

Create the demand; make it inviting for GA - a place they want to be vs. the place they have to be.

Variety of FBO’s

Attractive Terminal Facility

Stead Facilities/Expanding GA and economic base for the community as a whole.

Embrace GA as a partner; work together for economic development (GA, Air Carriers, Cargo, etc.).

GA needs to be a Group Effort.

Improved communication with GA to feel part of aviation; part of the team and organization at large.

Comments

“GA is so important in a down economy; it’s a revenue source that the airport can depend on during good and bad times.”

“This airport has the capacity to do so much more than it is doing now – ability to create a vibrant GA Community.”

“We all need to work together for economic development; embrace GA as a partner and not a step child.”

“The facilities that we do have that support GA (runways, etc.) are some of the best in the region.”
Air Service: “Must dos” include strengthening community partnership to maintain service.

- Build **community partnerships** to create the demand.
- Be proactive to maintain service - if we have flights struggling we need to get the word out/encourage people to use it before we lose it.
- **Capacity before Frequency**: Focus efforts on adding more passengers/filling the planes before additional frequency.
- Market across the country with partnerships that will package the destination “in total”.
- Seek demand from Mexico & Canada to increase International Air Service.
- Communicate with Airlines as it relates to events, conventions, etc.
- Continue the dialogue; if there is demand, airlines will come.

**Comments**

- “Air Service is our Golden Goose – it generates the dollars.”
- “The ability to create demand and sustain it is what will get more air service.”
- “Community has to create the demand and the passengers will come.”
- “From an airline perspective, I am not going to increase frequency, when I can increase capacity; makes more sense to expand and contract the flying (fill a larger aircraft vs. add another flight).”

DRAFT as of February 25, 2013
Hospitality: Create “The Betty Effect” - hospitality that comes along with feeling welcomed.

Keep up responsiveness - continue to build on this; trying to address complaints to make it a better place.

Continue working in partnership with Baggage Claim and TSA to create a pleasant all around customer experience.

All of us working together, in partnership, to make our airports a better place going forward.

Comments

“GA Pilots are accustomed to being treated as royalty -- we need to roll out the red carpet, make them feel welcome.”

“As customers, we are referring to people that both use the facility and lease out hangar space.”

“It is important that the feeling a person gets when they arrive here and when they leave is a good one – critical to developing return customers.”

“The airport has done a good job at stepping up as it relates to customer service.”
General aviation community feels more engaged, but hopes to see increased collaboration.

<table>
<thead>
<tr>
<th>Going Well</th>
<th>Needs Improvement</th>
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<tbody>
<tr>
<td>• RTAA has come a long way over the past few years as it relates to GA.</td>
<td>• Team approach/Collaboration across the Truckee Meadows.</td>
</tr>
<tr>
<td>• Excellent Runways; the facilities that we do have that support GA</td>
<td>• Communication with GA to feel part of aviation; part of the</td>
</tr>
<tr>
<td>are are some of the best in the Region.</td>
<td>team and organization.</td>
</tr>
<tr>
<td>• This is our Airport - A Community Airport; this has improved and</td>
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<tr>
<td>needs continued focus.</td>
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DRAFT as of February 25, 2013
Additional Discussion Points/Key Take-Aways

Playing a role in the Economic Development of the Reno-Sparks Area.

Recognition of RTAA Financial Stability and the Importance of maintaining Financial Health.

Cargo Development priority could be grouped with Air Service (things vs. people).

Stead Economic Development - so much land at Stead that could be used for Aviation related activities.
Section 4

STEAD USER GROUP
Stead Economic Development, General Aviation and Community Outreach/Air Service are the top priorities from the Stead User Group Committee.

# of Participants: 14

DRAFT as of February 25, 2013
Stead Economic Development: “Must dos” most importantly is leveraging the new terminal.

- Leverage the New Terminal
- Attract new businesses on the Air Field.
- Development of Adjacent Land & Commercial Development: Evolution of business around the properties; build an economic engine centered here.
- Attract Airplanes: Fix & Build Planes.
- Attract Community: Events, Museum, etc.
- Bigger Airport Signage; Promote equal/easier access to Reno.
- Food at Terminal/Support Local: Bring in local businesses/cafes.
- Marketing and Construction of Hangars: Need to focus on Marketing and Construction of Hangars at West End.

Comments

“Economic development is going to have to take place in order for the airport to grow, prosper and attract people to use it.”

“We need economic development in order to utilize and validate the construction of the new terminal.”

“There is huge opportunity as it relates to adjacent land development – specifically related to manufacturing; business owners likely have an interest in aviation and manufacturing companies tend to want to be adjacent to the airport – to store their planes or fly people in.”

“The facility here is world class – air field is one of the best (long runways that are bomber proof, etc. – what is missing is the evolution out.”
General Aviation: “Must dos” include promoting Stead as a “Mecca of Aviation.”

- **User Fees:** Collectively address united.
- **Bring in New Pilots:** Provide pathways, programs, education; educate youth to pursue careers in aviation.
- **Education:** Flight Schools at the Airport
- **Take a collective approach** to promote the grand opening of the New Stead Terminal (Media/PR).
- **Promote Stead as a “Mecca of Aviation”**.
- **More Tie-Downs;** actually do have a shortage when things are going on in town.
- **Bigger Ramp** - need more airplanes.
- **FBO plans** to enhance air service as well.
- **Enhance the website** - for GA and community as a whole.
- **Hangars on the West End** are old/shabby, need to be looked at more carefully.

Comments

“Reno Air Race is the draw/core of this airport – it is the Brand; we have potential to promote ourselves as the mecca of aviation.”

“We need to think about educating and developing the next generation of pilots – attract the youth of our community into the airport.”

“The Grand Opening of the new terminal provides a great opportunity to represent and promote Stead.”

“GA is really important to Stead and the overall economic development of the region.”
## Trends and Examples from Other Airports

### Trends
- Lack of youth/next generation of GA Pilots
- Businesses on the Airfield
- Development of Adjacent properties

### Other Airport Examples
- Flight Planning Room
- Airplane Business on the Field - Fix and Build Planes
- Maintenance Facilities
- Food at the Terminal: Susanville Restaurant (example of success) vs. Minden Restaurant (went belly-up several times) - be mindful as it relates to food/retail selection

DRAFT as of February 25, 2013
# What is Going Well and What Needs Improvement

<table>
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<tr>
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<tbody>
<tr>
<td>• Maintaining Facilities</td>
<td>• Community Outreach</td>
</tr>
<tr>
<td>• Running the Airport like a business</td>
<td>• Stead Awareness/Marketing</td>
</tr>
<tr>
<td>• Enhancing travelers experience in the terminal.</td>
<td>• Improve Infrastructure and open up land for individual hangars.</td>
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<tr>
<td>• Parking</td>
<td>• Recognize that Capital Improvement Budget is lacking.</td>
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<tr>
<td></td>
<td>• Carson Airport: Is there a lesson to be learned? (over-invested; built it and no one came).</td>
</tr>
<tr>
<td></td>
<td>• Without a Master Plan it is difficult to coordinate efforts.</td>
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Section 5

AIRLINE AFFAIRS COMMITTEE
Financial Health, Reno-Tahoe Airport Economic Development and Customer Service are the top priorities from the Airline Affairs Committee.

# of Participants: 5

DRAFT as of February 25, 2013
Financial Health: “Must dos” include low cost structure and maintaining transparency.

- All priorities support this (outcome) and financial health supports all priorities.
- **Maintain Stability:** Continue to manage debt and maintain financial positioning.
- Continue to maintain a high level of **transparency** as it relates to finances, etc. - airlines value this greatly.
- **Maintain low cost structure.**
- **Agility/Industry Awareness:** Manage around the evolution/change in the industry; remain flexible.
- Make sure decisions are in conjunction with each other so that they are healthy; right projects at the right time.
- **Don’t Over-Extend:** Ensure there is an established/forecasted need - taking a smart approach to master planning, etc. “Build Smart”.

**Comments**

- “Airports get in trouble through over-extending themselves and creating financial positions that are vulnerable - RTAA has managed debt very well and is positioned to be successful no matter what.”

- “RTIA is financially stable with well managed debt which puts it in a position to react quickly – it is key to maintain this position.”

- “The Reno team has done an incredible job as it relates to transparency (finances, rates & charges, etc.) – this transparency is something we value greatly.”

- “RTIA has been a model as it relates to cost control and relationships with the carriers – applause to the team.”

- “Master Plan is closely related with Financial Health Priority; I would just say that a lot of recent projects have been very successful and Reno-Tahoe airport is great – in terms of capacity and # of gates at this point, facilities are in great shape; caution on this – all financial considerations to be taken into account when you undergo this.”

DRAFT as of February 25, 2013
RTIA Econ. Dev.: “Must dos” include stronger emphasis on brand awareness of area at large.

- Focus on more economic development and **brand awareness** to increase air service.
- **Stronger regional/community emphasis** in this area - economic development tied with brand awareness rolls up to support the other priorities of Air Service and Financial Health.
- Economic development and brand awareness beyond our community work together and fit within a broader strategy for the Reno-Tahoe area at large.
- Economic development around the airport boosts the financial health of the airport and attracts more customers/businesses to the area.
- Look at economic development opportunities around the airport that are not passenger/airline related.

**Comments**

“Economic Development is closely related to customer service in terms of the whole travel experience from walking in the door to getting on the plane.”

“All airports should look to find more economic development opportunities; take advantage of their position in the community and expand in other areas that are not passenger/airline related.”

DRAFT as of February 25, 2013
Customer Service: “Must dos” include delivering a great customer experience from curb to gate.

- Continue to enhance the whole customer experience from “curb to gate”. People are attracted to an airport based on a great customer experience.
- Take a well rounded approach. Think of the whole experience and the blend of it from the customers eye - includes security, etc.
- Recent terminal and concession expansions at RTIA have been successful.
- Maintain a positive relationship with TSA (staff interactions, etc.) to help ensure a positive overall experience for the customer.
- Baggage and passenger screening (has improved over past few years) - continue this focus.

Comments

- “Customer experience from the time they come to the airport to when they take off is very critical to us; certainly a top priority.”
- “We rely on the airport to help us out to make the whole customer experience a good one.”
- “RTAA has done a great job being on top of customer service, ensuring a positive connection with TSA, etc. - it’s a priority to continue this focus.”
- “Even though we can’t control TSA, it is part of the customer’s overall experience – important that the RTAA staff and TSA maintain a good relationship.”
Air Service: “Must dos” include the community coordinating to create demand.

- Challenge with short-haul markets is not just specific to Reno; overcoming this is something to work through as partners.

- Glamour is in the new service but equally important to support the existing service.

- Finding ways to put people on our existing flights is just as important as filling the new flights; that customer counts just as much as a new customer on a new route.

- Airports have limited ability to create new air service; must be a community, coordinated effort to create demand.

- Reno-Tahoe marketing needs a broader reach, tap new markets, create demand. Expand marketing efforts to the East Coast.

Comments

“I find it perplexing that the Reno-Tahoe market is not bigger than it is; seeing all that your area has to offer; it amazes me that passenger traffic is not higher; the only thing I can think of is lack of advertising further East, not sure Reno-Tahoe is as widely known on the East Coast as it is on the West.”

“Air Service is a priority for all airports - it is more important now for Reno than ever.”

“Airlines manage to drive traffic based on what you provide us as it relates to your economy and the markets you drive – we don’t drive traffic - you do.”
Industry Trends to Watch

Constant Change: Industry in constantly changing/shifting; important for airports to be flexible, agile and financially secure in order to react quickly to shifting industry needs.

Mergers/Consolidation in the Industry: Down to 4 major airlines; changes the cost structure of airports, requirements of facility, needs of infrastructure, etc.

Macro-Economic Change: Economic downturn (2008-2009) along with rising cost of fuel led to major challenges in the industry; “cheaper to drive” notion has had impact on customers decisions to fly, along with down economy and less travel in general.

Security: Security has changed dramatically over past several years (9/11).

Changes in Route Structure to accommodate/survive in down-economy (short-haul routes have changed to respond to struggles in certain markets).

Technology/Industry Evolution: Technology is rapidly changing the industry and will continue to do so.

Air Service Development is a big priority for all Airports.

Stakeholder Engagement: Given economic downturn, successful airports pull in key stakeholders to evaluate business opportunities, needs, etc.
## What is Going Well and What Needs Improvement

### Going Well
- Financial Health/Debt Management
- Level of Transparency
- Flexibility; position to be agile and react quickly
- Relationship with TSA
- Cost Control
- Relationships with Air Carriers
- Business Terms
- Terminal/Concession Expansions
- Comfortable Airport – customers are happy
- Reno-Tahoe does a great job marketing new flights to ensure success.

### Needs Improvement
- Marketing beyond the West Coast
- Reno-Tahoe Brand Awareness
- Economic Development around the airport
- Stronger *regional/community emphasis* in the area of economic development and brand awareness.

DRAFT as of February 25, 2013
Additional Take Aways from Airline Affairs

Master Planning/Expansion:

- **Taking a smart approach vs. mentality of St. Louis** - “build it and they will come”; build in a way that you have stop gaps in place (due to economic downturn, etc.); ability to stop, take a break - then re-start with master plan if need be based on dynamic industry.

- Other examples: San Jose and Sacramento are now overleveraged and struggling due to expansion.

Cargo Development:

- **Cargo development is a key opportunity** for Reno-Tahoe; important to be prepared for potential growth in this area.

- **Welcoming Tax Structure** in Nevada (especially due to shifts in California) creates great opportunity for Big Box Retail locating here as well as Distribution Centers; probably more and more of this coming our way.

- **Growth in the Pharmaceutical Industry** is a major trend from the Cargo side of the house - will continue to grow as our population ages. Bringing these types of organizations to Northern Nevada is great opportunity for adding jobs and additional lift to the airport.
Air Service, Cargo Development and Financial Health/Economic Development are the top priorities from the Air Service Task Force.

# of Participants: 9

DRAFT as of February 25, 2013
Air Service: “Must dos” include offering incentives & business partnerships to keep service.

- **Incentives**: Offer incentives to support air service development.
- **Engage Businesses Collaboration** (*Ticket Banks example*) - companies pre-purchase tickets for frequent destinations.
- **Stay on top of trends** and pursue successful avenues that have the greatest potential.
- **Keep costs low** and maintain financial health/management.
- **Lobby to pass the Aircraft Parts Tax**.
- **Competitive Awareness**: Keep track of what other airports are doing so we know exactly what they are offering.
- **Lobbying**: Reno needs a “lift” - if State could provide some help to get Middle Nevada going the whole state would be thriving.
- **Pursue the film and television production industry** to create greater demand.

**Comments**

- “The only thing the airport can do directly is keep cost low and maintain financial management – creating demand is a collective/community effort.”
- “Some States underwrite, fund and provide incentives to support air service development – Nevada does not provide any of this.”
- “We need to be aware of trends, stay on top of it, be honest, and pursue the avenues that have the greatest potential in a very challenged environment.”
- “Awareness and recognition of what other States do to support air service is important.”
Cargo Development: “Must dos” include engaging the community to carry the message.

- Community/Business Groups to Carry the Message - key issue**.
- We need more community groups doing this - carry the message; spread the need/desire that the demand exists (RSCVA doing this - we need more of this).
- Tout our successes - make sure the rest of the world knows about our “wins”.
- Cargo from China is an opportunity - emerging giant in economy.
- Positioning Sparks/Reno/Tahoe as distribution center - critical to have a great cargo network system.
- Leverage our natural advantage - logistically than many other West Coast Regions.

Comments

“Cargo is such a revenue generator for the airport.”

“We are trying to position the destination to bring conventions/business here; this shows diversification of the business sector.”

“Cargo and the money that it brings in = Financial Impact; helps the airport in so many ways - income to help offset other airports needs.”

“Domino Effect: Storage – builds business opportunity -- provides a domino/positive business effect.”
Trends to Watch in our Community/Region

- **Interconnectivity of the West Coast/Service to Bay Area**: Limited demand/service to Bay Area is a concern - this service is so critical to the business/tech industry and our ability to promote Reno. “We must have it.”

- **Increasing value/demand for the area coupled with lower access - less Airlift.** “We are promoting the value at a time when it is difficult to get here - we may be creating more demand than the market can handle.”

- **Shift from Tourism to Business Demand**: Switch from leisure travel to business.

- **Transition to UNR/Mt. West**: UNR is a big part of our wheel here - it ties in cities that we need air service from; we need to work hand in hand with them.

- **Major Event Opportunities**: Increasing major events in Reno; we need to be more strategic as it relates to Air Service, marketing, etc.

- **California Tax/Nevada Business Appeal**: Opportunity to leverage California’s negative publicity on Business Tax; a great business driver for Nevada.

- **Aviation Tax/Abatements**: EDAWN/GOED Initiative; right now we are not competitive, impacting Air Service potential as well as economic development.

- **Rising Cost of Air Fare**: Trend toward higher airfare; as we are looking to increase capacity on demand, airlines are raising costs.

DRAFT as of February 25, 2013
What is Going Well and What Needs Improvement

**Going Well**
- Location - everything in close proximity
- Time/Efficiency due to size and location - major strength for destination and airport
- Such an efficient airport and real highlight to Business Travelers
- Reno Flight Experience is wonderful; efficient, fun, great customer service
- Beautiful Facility
- Concession/Terminal Expansions

**Needs Improvement**
- Consider location of Slot Machines in the middle of the concourse; trying to promote Reno-Tahoe as a 4-Season Destination Resort (outside of gaming) and slot machines are the first thing passengers see when they get off the plane.
- *Balance is key* as the slot machines do generate revenue (~$2M per year)

DRAFT as of February 25, 2013
Financial Health is so critical; if you don’t have this, you can’t get air service and low cost structure that we need; contributes to air service and cargo.

Community Outreach: It is important to bring business/community together in partnership to promote the area and increase demand.

Safe and Secure Travel: From a PR perspective, this needs to be on top of the list.

Stead/Drone Initiative provides a huge opportunity as it relates to Economic Development for the area.

General Aviation: Keep focus here and continue to grow.
Section 7
CITIZEN OUTREACH

DRAFT as of February 25, 2013
Air Service, Cargo Development and Financial Health are the top priorities from the Citizen Outreach Committee.

# of Participants: 18

DRAFT as of February 25, 2013
Expand and maintain to enhance overall financial outcome.

Emphasis on **Maintain** (which is a real struggle here).

Bay Area Service: With Tech industry so close to Reno, air service to the Bay Area is so important.

Expand the number of departures.

Focus on expanding in to other market places.

**Brand Awareness** to remove misconceptions around ease of travel here.

**Community outreach** and partnership.

**Customer Service** and a positive experience results in demand for air service - a positive experience helps passengers decide to return to RTIA.

**Comments**

“Air Service expansion is extraordinarily important – especially given growth of technology industry, etc.”

“Air Service coupled with GA aspects– we have to have both to get community/economic development.”

“Air Service is tied to brand awareness – there is a misconception as it relates to ease of travel here.”

“Customer service is a direct reflection to our passengers; their experience will ultimately help them decide whether or not to return – this is closely tied to demand and air service.”
Cargo Development: “Must dos” include accommodating cargo infrastructure and promotion as a global center.

- Cargo infrastructure needs to be accommodating.
- Critical and Natural as it relates to warehouses, industrial development, etc.
- Cargo is an easier revenue stream than passengers.
- Tied to significant efforts; relates to everything we are doing with distribution, development, etc.
- Promote as a global center/unique opportunity.
- Cargo is key to Econ Development in the area.

Comments

“Distribution centers – we have a natural airport to use for a cargo operation – could be more friendly as it relates to Cargo.”

“Such a cool niche – we are suddenly a global center/unique opportunity to pursue.”

“Cargo goes hand in glove with econ development at Stead.”

“Cargo is Critical and Natural as it relates to warehouses, industrial development, etc.”
Financial Health: “Must dos” include maintaining a healthy financial position in order to support strategic initiatives.

- This is an outcome - but also a priority; if we can’t pay for infrastructure we won’t be able to support priorities.

- This is the catch all -- other activities to contribute to this.

- From Air service perspective this is very important because it keeps costs low.

Comments

“The job being done at RTAA is excellent – which is why it may be getting less “attention” as a priority -- we are so well positioned and emphasis on maintain is important.”

“You do everything else right it takes care of this; BUT without well-positioned financial health we are unable to do what we need to.”
## Trends

- Marketing the area and community as a whole - working with EDAWN & GOED
- Fostering Entrepreneurship
- Continued decrease in Casino Industry employment
- Cargo development in Story County, Lion County, etc. we could be threatened by competition

## Other Airport Examples

- Live music/ tapping into talent in the community - provide the opportunity to perform - promote local talent
- Work Space: Nicer workspace areas for laptops, working, etc.
- Upscale Restaurants/Wine Bar - a fun place to be “delayed”
- Comfortable Seating Areas
- Parking Validation for people who come and spend money at the airport
- Seattle/Boeing Field - Example of profitable GA facilities for unscheduled activities
# What is Going Well and What Needs Improvement

<table>
<thead>
<tr>
<th>Going Well</th>
<th>Needs Improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Safety and Security</td>
<td>- GA facilities - opportunity for improvements</td>
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<tr>
<td>- Financial Health</td>
<td>- Facilities for the disabled (look at/potentially improve)</td>
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<tr>
<td>- Ticketing and Check-in</td>
<td>- Lack of infrastructure as it relates to Stead/Development</td>
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<td>- Baggage Claim</td>
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<tr>
<td>- Clean, nice, environment</td>
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<tr>
<td>- Parking is so easy here</td>
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Section 8

EXECUTIVE STAFF

DRAFT as of February 25, 2013
Financial Health, Safety & Security, Customer Service and RTAA Org/Culture are the overarching strategic elements for the Executive Staff.

# of Participants: 11

DRAFT as of February 25, 2013
Expectations and Assumptions: What does this Strategic Plan need to address?

### Expectations

- Clear Vision/Unified Direction
- Resource Alignment
- Board Direction and Ownership
- Continuity and Knowledge Transfer
- Understanding of what is realistic, possible and strategic
- Simple document that is easy to read, understand and implement
- Flexible and High Level: Staying at 30,000’ to allow for adjustment
- Monitor and Evaluate: Need to build in *mid-course corrections*; adapt based on changes/shifts in conditions
- Plan not intended to “solve” things but to serve as an organizational decision making tool/roadmap

### Planning Assumptions

- **Public safety** is always a #1 focus
- **Business orientation** built on a foundation of *economic efficiency* and optimization
- Staying **flexible, agile, and aware** of constant shifts in the Aviation Industry
- **Resource/Capacity Alignment**: Recognition that we have/need resources necessary to achieve these priorities/objectives
Key Insights related to Financial Sustainability and a Safe/Secure Environment

Financial Sustainability

Maintain the business orientation and mindset of RTAA as an efficient, prudent, and financially stable operation.

- Economic Development/Revenue Diversification
- Cargo Development
- Maintain and Enhance Air Service
- Supporting all aspects of General Aviation
- Environmental - relates to mindset of being efficient/sustainable

Safety and Security

Public safety and security is always the #1 focus for RTAA.

- Infrastructure/Facilities
- Responsiveness to the Market
- Relationship with TSA (also tied to customer service)
- Responsiveness to changing needs/mandates

“Build a foundation on economic efficiency and optimization and you can’t go too far in the wrong direction; making streamlined, good business decisions is built into the psyche of the org.”
Key Insights related to enhancing Customer Service and the RTAA Org/Culture.

**Customer Service**
Enhance Customer Service/Relations with all Stakeholders.
- Customer Service/Passenger Experience
- Business/Community Relationships
- Community Outreach and Public Relations
- Marketing/Brand Awareness

**RTAA Org/Culture**
Maintain/continue to enhance the RTAA organizational culture (ties in to financial sustainability and ability to execute on strategic priorities)
- Training/Professional Development
- Org Values/Culture: *There are aspects of the RTAA culture that are extremely beneficial to the org and staff*
- Knowledge Transfer
- Succession Planning
- Capacity/Resource Alignment

DRAFT as of February 25, 2013
Mission Input: What the airport means to the Executive Staff

- Shorter/Simpler Statement
- Financial Health/Sustainability
- Self-sufficient
- Economic/Environmental Sustainability
- Provide safe and secure environment
- Provide a high level of customer service
- To benefit the Region (entire catchment area/not just local community)
- Business Orientation/Mindset
- Part of the regional economic engine
- Full service airport network

Be financially sound, provide a safe and secure environment and a high level of customer service to all stakeholders.

Use the people and culture of the organization to provide a safe and secure customer experience while enhancing the financial health of the organization.
Regional Emphasis including Tahoe and entire catchment area.

Lasting Impression: *We make the ultimate first and last impression when people come to the region.*

We connect the region to the rest of the world.

Flexibility/Agile to respond to changing industry.

Sustainability (Environmental & Economic)

Recognized as Industry Leaders (this is part of our DNA)

Response to Market

*Reno-Tahoe airport provides a “Sense of Place”* - You get a different feel when you land here; a reflection of our region/community/organization

Business Orientation (efficient and productive)

Partners in the community

Self-Sustaining

Conduit that brings business and economic development to the region; our facilities enhance/facilitate economic development through providing air service, cargo, customer service, safety/security, etc.
To stay updated and informed on the progress of the strategic planning process, go to www.renoairport.com > Latest News.

For questions and comments, contact Trustee Adam Mayberry, Strategic Planning Chair, amayberry@cityofsparks.us