

Duluth International Airport

2021 Consumer Survey – Key Insights

I. Project Summary:

Swim Creative and the Duluth International Airport conducted a survey of regional residents via email and social media in May 2021. The survey received 432 responses, compared to 2020's survey with 397 responses. This year, a \$100 Delta gift card was offered as a prize to a random survey participant. 427 of the 433 participants opted in to provide their email address, and 406 opted to provide their phone number to be entered to win.

The goal of the survey was to gain a better understanding of how regional residents make travel decisions from 2020 to 2021. An additional focus of this year's survey sought to gauge fliers' perceptions of flying as the restrictions of the COVID-19 pandemic lessen and how they believe DLH is handling safety and what DLH can do to make traveling better during this time and the next year.

Main takeaways from the survey:

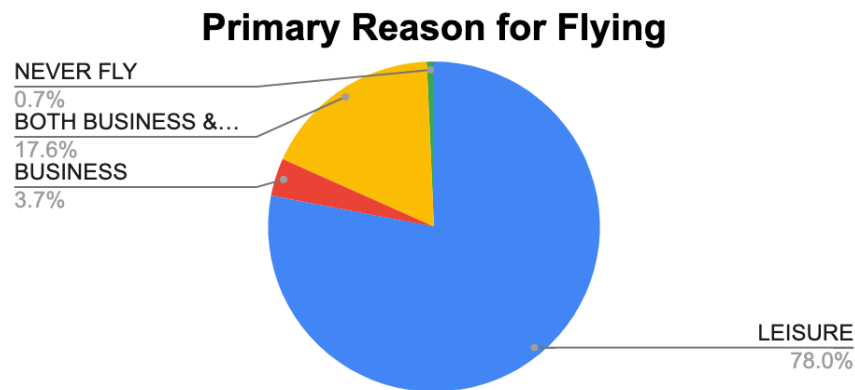
- Flying for leisure is still the most popular reason for travel at 78%.
- Fliers are eager to get back to flying. 85% of people are planning on flying again within the next 6 months.
- Fliers have seen clear communication from the airport regarding DLH's efforts to increase airport and airplane cleanliness and safety due to the COVID-19 situation. They know what the airport is doing to address the situation appropriately.
- Fliers continue to want airport procedures and operations to maintain cleanliness. They think that DLH is doing a great job at following CDC guidelines. Many feel safe to fly through DLH.

II. Insights:

INSIGHT 1 - Flying for leisure is still #1

Similar to last year, the majority of respondents cited leisure travel as their primary reason for flying, no matter their departure point.

- 78% reported flying for leisure only
- 17.6% reported flying for both leisure and business
- 3.7% reported flying for business only
- Fewer than 1% of people stated that they never fly



These findings don't indicate a major shift from last year's survey, though there are more people flying for business. When asked the same question in 2020, participants reported that:

- 67% reported flying for leisure only
- 23% reported flying for both leisure and business
- 9% reported flying for business only

INSIGHT 2 - Travelers want to fly again soon, ideally within six months

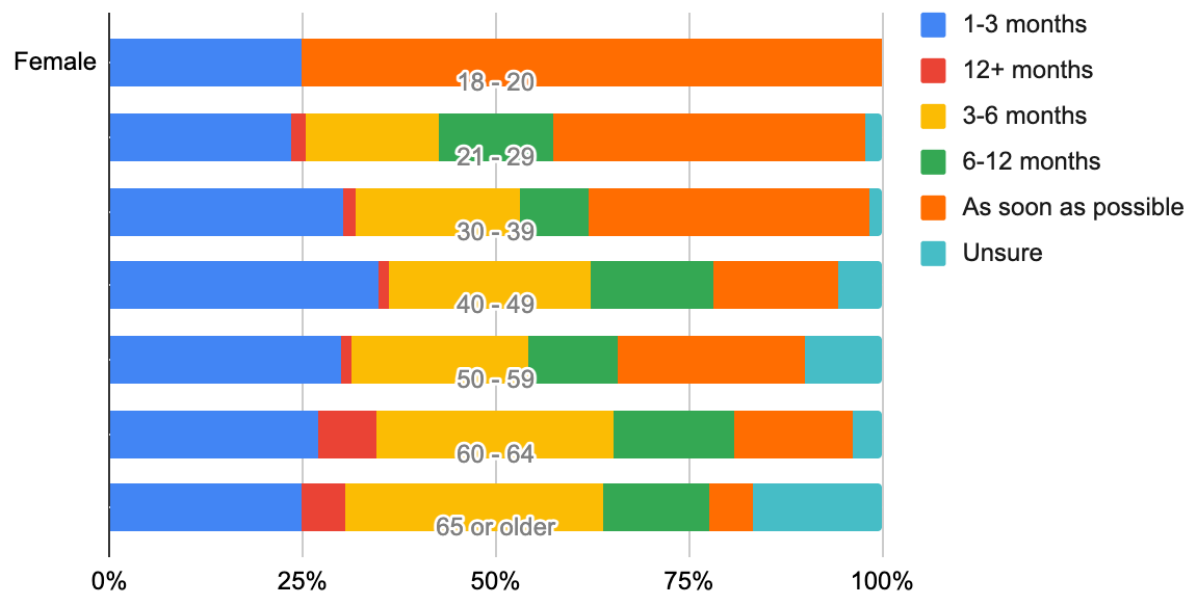
When asked when they plan on flying again, fliers had a wide range of expectations, with 80.4% reporting they hope to return to flying within six months. More specifically,

- 29.2% plan on flying again in 1-3 months
- 25.7% plan on flying again in 3-6 months
- 25.5% want to fly as soon as possible
- 11.3% plan on flying again in 6-12 months
- 5.8% are unsure if they will fly again
- 2.5% plan on flying in 12+ months

We examined this same question even further to see how different demographic groups (gender, age) responded.

When Do You Plan On Flying Again?

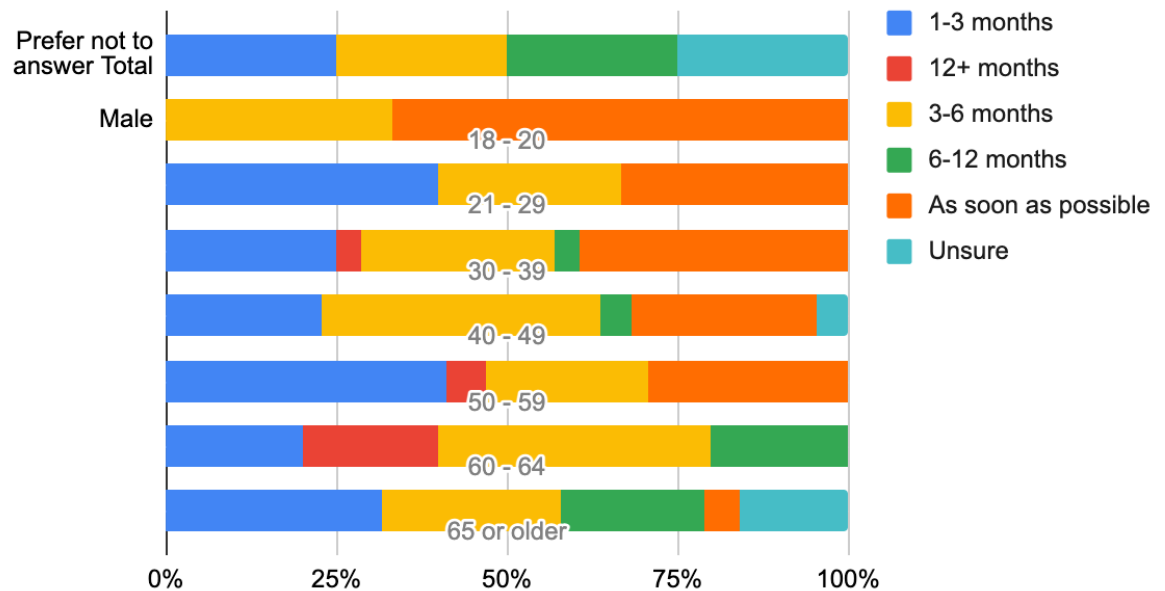
Females



A majority of women, 78.4% plan on flying again in 1-6 months, only 6.3% are unsure of when they will return to flying. Women ages 21-59 feel the most urgency, as a large portion of women in that age group responded that they plan to fly within the next 1-3 months or as soon as possible. The minority of women ages 60-64 expect to wait 6-12 months before flying again.

When Do You Plan On Flying Again?

Males



Men ages 18-29 have the most urgency in returning to flying, with many of them responding that they plan to fly again either as soon as possible or within the next 1-3 months. About 40% of men ages 60 and older expect to wait 6-12 months before flying again.

INSIGHT 3 - Demographics only slightly affect how often people fly

In 2019, 2020 and 2021, we asked how often people fly during the previous year.

In 2021, we found that:

- 57.7% fly less than once per month
- 6.7% fly about once per month
- 2.6% fly several times per month
- 33% never flying

In 2020, we found that:

- 72% fly less than once per month
- 13% fly about once per month
- 5% fly several times each month
- 9% never flying

In 2019, we found that:

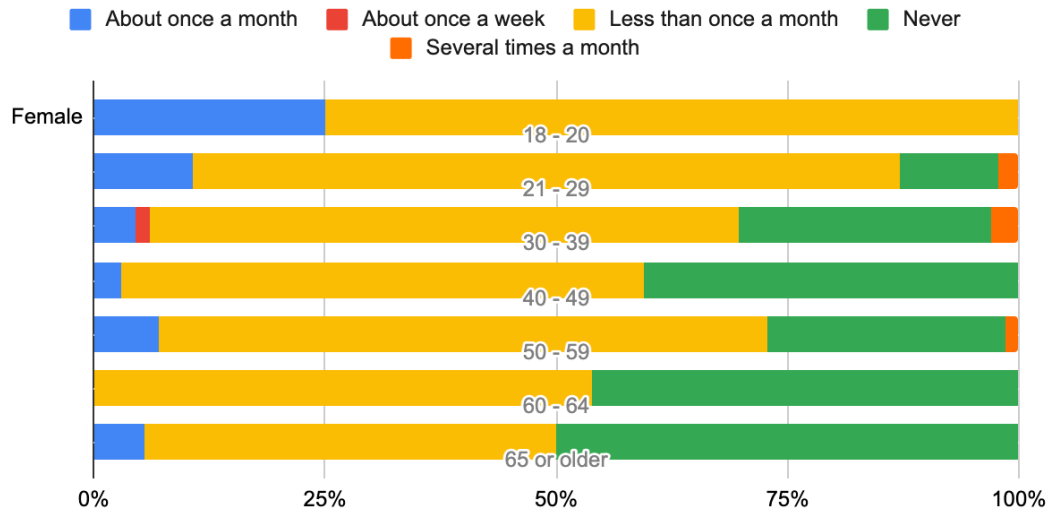
- 82% fly less than once per month
- 13% fly about once per month
- 3% fly several times each month
- 2% never flying

We examined how flyer demographics (age group, gender) impacted their behavior and decision-making in this area as well.

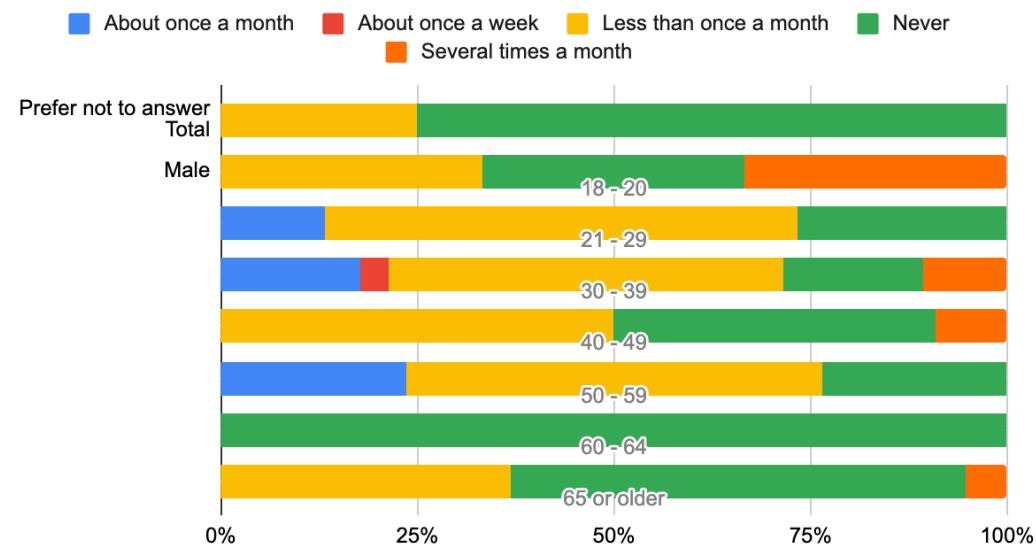
The vast majority of women report traveling less than once per month, while around 20% travel about once per month.

How Often Did Women Fly in the Last Year?

Female



How Often Did Men Fly Last Year?



There is a small difference between the frequency of flights that men and women take. The majority of men fly less than once per month, and about half have not flown in the last year. Men ages 18-20 are the largest demographic group who fly several times per month.

INSIGHT 4 - Flyers typically book their flights 1-4 months in advance

We asked respondents how far in advance before their trip date do they book travel when flying in 2019, 2020 and in 2021.

In 2021, we found that:

- 3.7% book 1-2 weeks in advance
- 13.2% book 3-4 weeks in advance
- 35.9% book 1-2 months in advance
- 36.3% book 3-4 months in advance
- 10.9% book 5+ months in advance

In 2020, we found that:

- 3% book 1-2 weeks in advance
- 12% book 3-4 weeks in advance
- 39% book 1-2 months in advance
- 38% book 3-4 months in advance
- 8% book 5+ months in advance

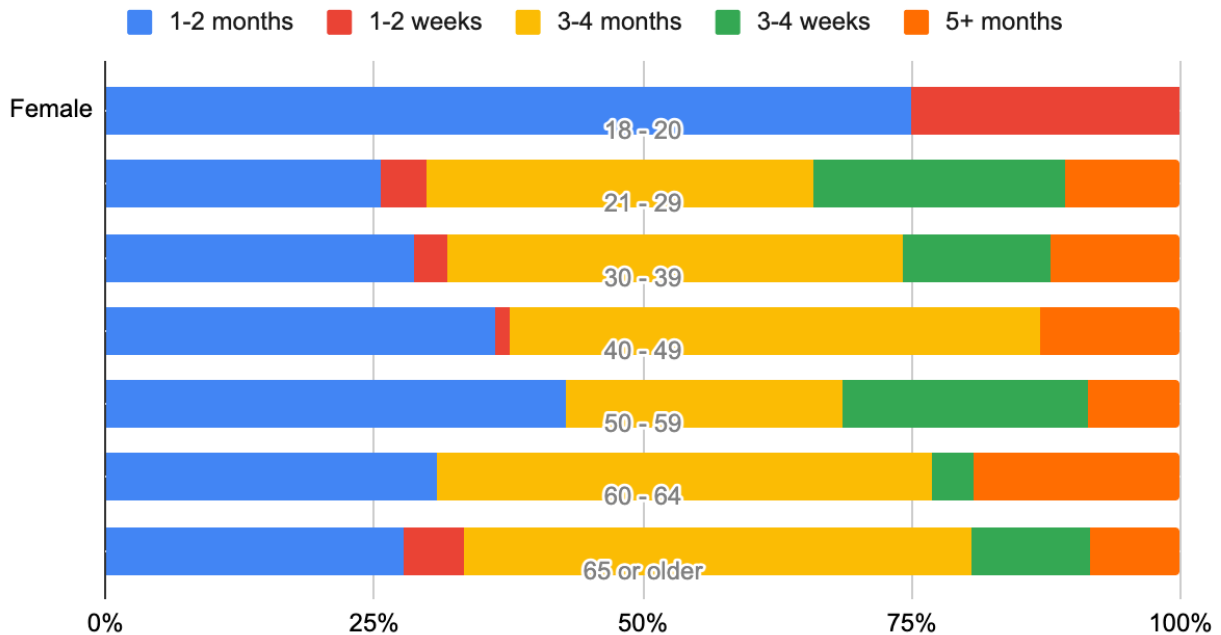
In 2019, we found that:

- 3% book 1-2 weeks in advance
- 13% book 3-4 weeks in advance
- 29% book 1-2 months in advance
- 33% book 3-4 months in advance
- 14% book 5-6 months in advance
- 5% book 6+ months in advance

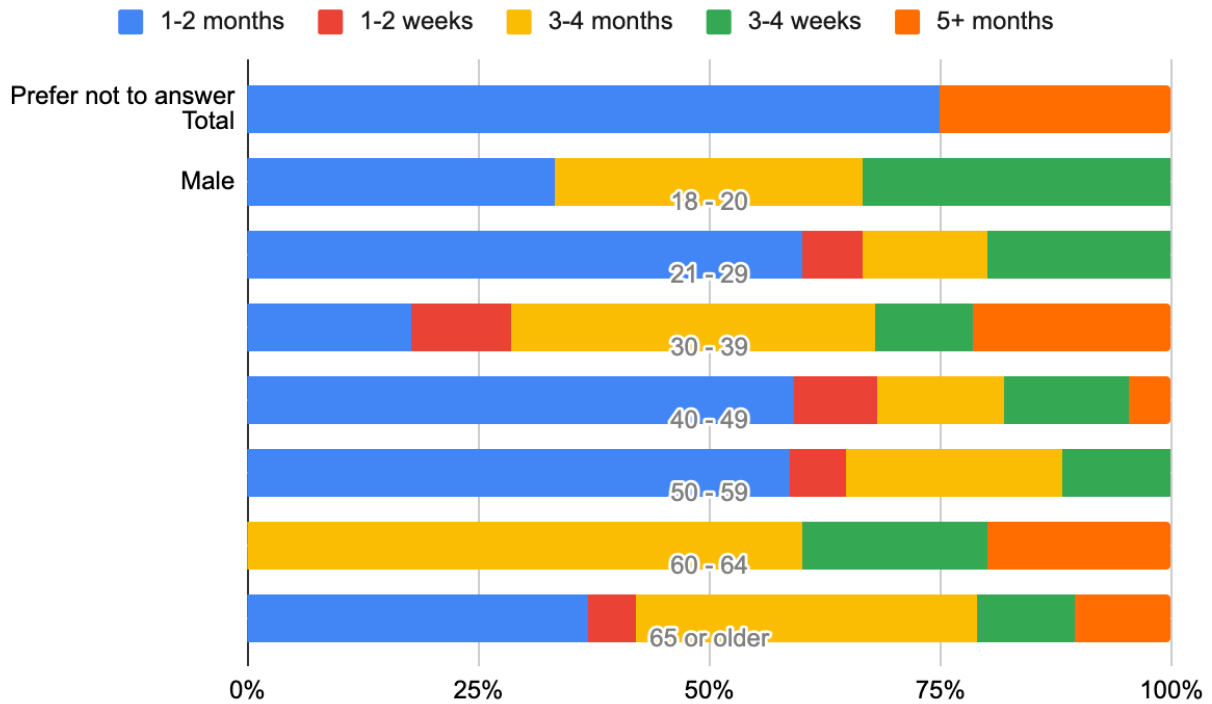
From these years, we can see that in 2021, the majority of people booked between 1 and 4 months in advance.

We also took another look at the results of the same question, also noting demographics (gender, age group)

How far in advance do you book your travel when flying?



Women primarily book their flights 1-2 months in advance or 3-4 months in advance. Very few women report booking travel 1-2 weeks in advance. Compared to 2020, there is a significant upward trend for women booking 3-4 weeks in advance.



Most men either book 1-2 months in advance or 3-4 months in advance. Men are more likely to book travel within 1-2 weeks or 3-4 weeks before flying than women are.

INSIGHT 5 - Perceptions of how DLH is handling COVID-19

About three-quarters of respondents either agreed (28.5%) or strongly agreed (43.8%) that they have received appropriate communication from the airport regarding COVID-19. 22.5% of people responded that they neither agreed or disagreed with the same statement. This is a significant increase in trust from people compared to 2020 at about 50% agreeing or strongly agreeing that they have received appropriate communication.

Similarly, a majority of respondents either agreed (29.4%) or strongly agreed (51.4%) that they thought the DLH airport had taken actions to address COVID-19. 15.7% of people responded that they neither agreed or disagreed with the same statement.

An overwhelming majority of respondents either agreed (28.9%) or strongly agreed (54.4%) that they felt confident in the DLH airport's ability to meet their needs during this time. 13.2% of respondents neither agreed or disagreed with the same statement.

Based on the insights from the above three questions, it seems that the additional communication efforts have been successful. This has ensured that DLH fliers received appropriate information regarding how DLH is responding to COVID-19 and fliers' needs during this time.

We asked fliers to share what they might expect when they go back to the airport. A large number of respondents hope to see efforts at DLH to increase safety and cleanliness measures in the wake of COVID-19.

Common responses emphasize:

- Visible cleaning and a general feeling of cleanliness (44.2%)
- Social distancing efforts being taken (6.9%)
- Staff members and fliers wearing PPE (masks) (15.7%)
- Sanitation of airport and airplanes, and availability of hand sanitizer (6.5%)
- Safety being a top priority (12.7%)
- Following recommended guidelines and updated precautionary measures in general (3.9%)

Additional responses indicated that fliers have (responses = less than 15, etc):

- Expectations of more available flights and them being on time
- Few to no expectations of any significant change
- Expectations of a pleasant, friendly atmosphere and the same great customer service as always
- No concerns about the way DLH will handle the situation & trusting that DLH will do whatever is necessary



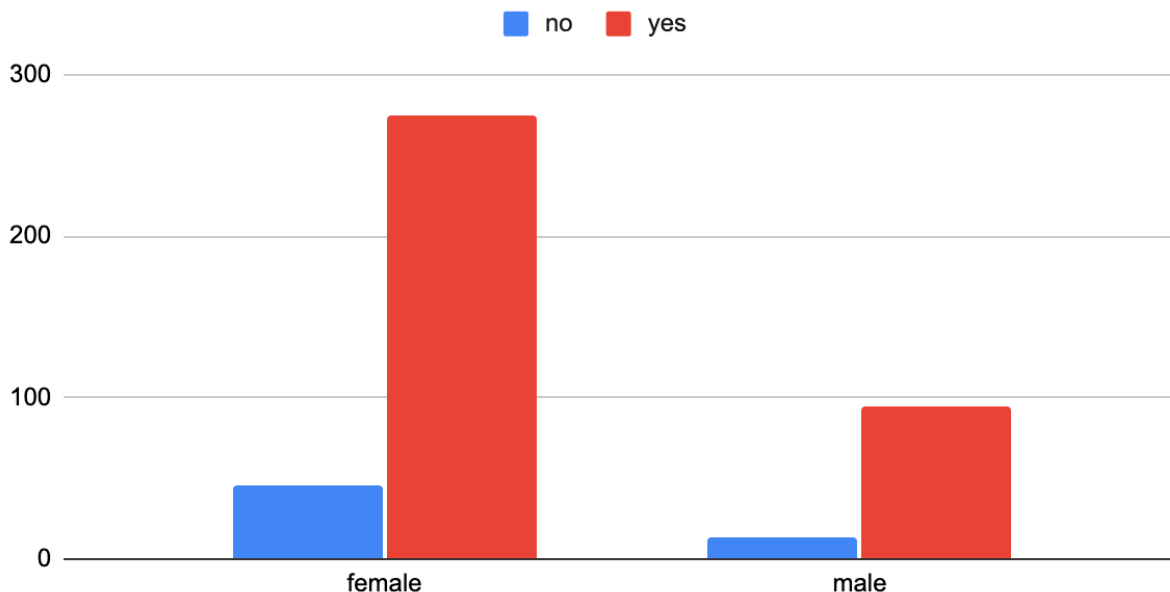
INSIGHT 7 - Most fliers are aware of Sun Country's new direct service to and from Fort Myers, Florida and Phoenix, Arizona.

We asked fliers to share whether they had heard about the new Sun Country direct service to and from Fort Myers, Florida and Phoenix, Arizona. We broke it down further to see how men versus women were different.

We found that:

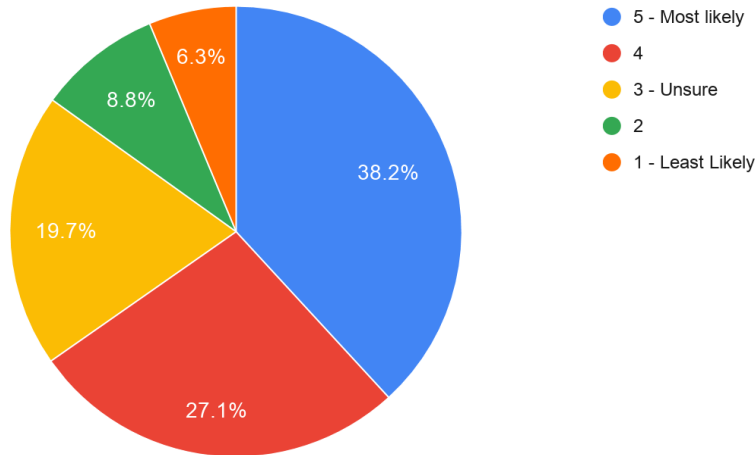
- 85.9% women knew about Sun Country (274)
- 14.1% women did not know about Sun Country (45)
- 87.2% men knew about Sun Country (95)
- 12.8% men did not know about Sun Country (14)

Are you aware of Sun Country's new direct service to and from Fort Myers, Florida and Phoenix, Arizona?



We also asked how likely people were going to use the new service with Sun Country. About three-quarters of people are planning on using the new service.

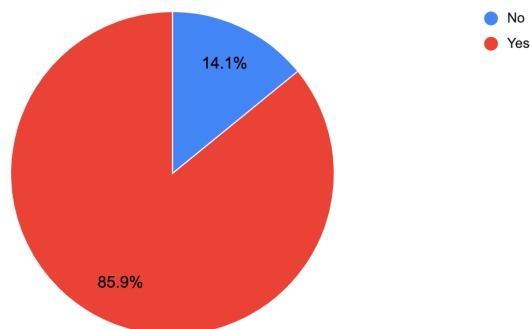
How likely are you to use this new service?



Simply put, we found that the majority of people know about Sun Country bringing direct flights to DLH.

- 85.9% do know about Sun Country
- 14.1% do not know about Sun Country

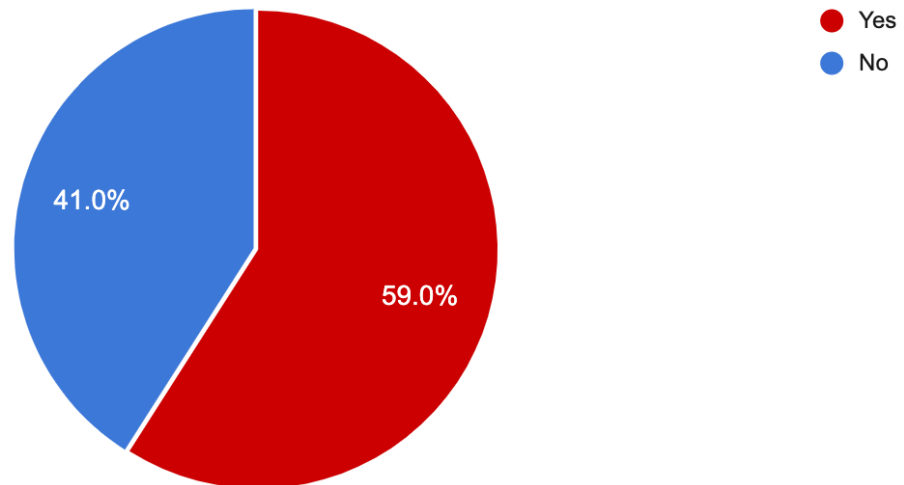
Are you aware of Sun Country's new direct service to and from Fort Myers, Florida and Phoenix, Arizona?



III. Appendix 1: Raw Survey Data

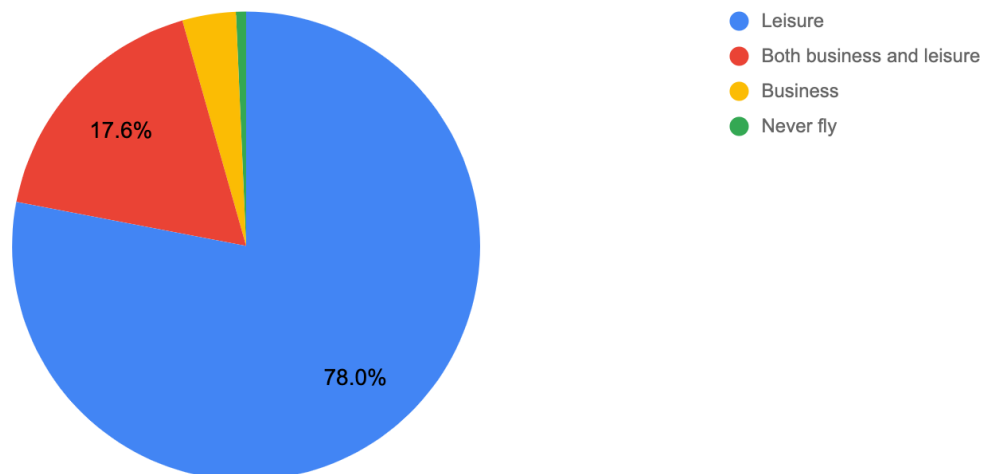
Flight Behaviors

In the past year did you fly for business or leisure?

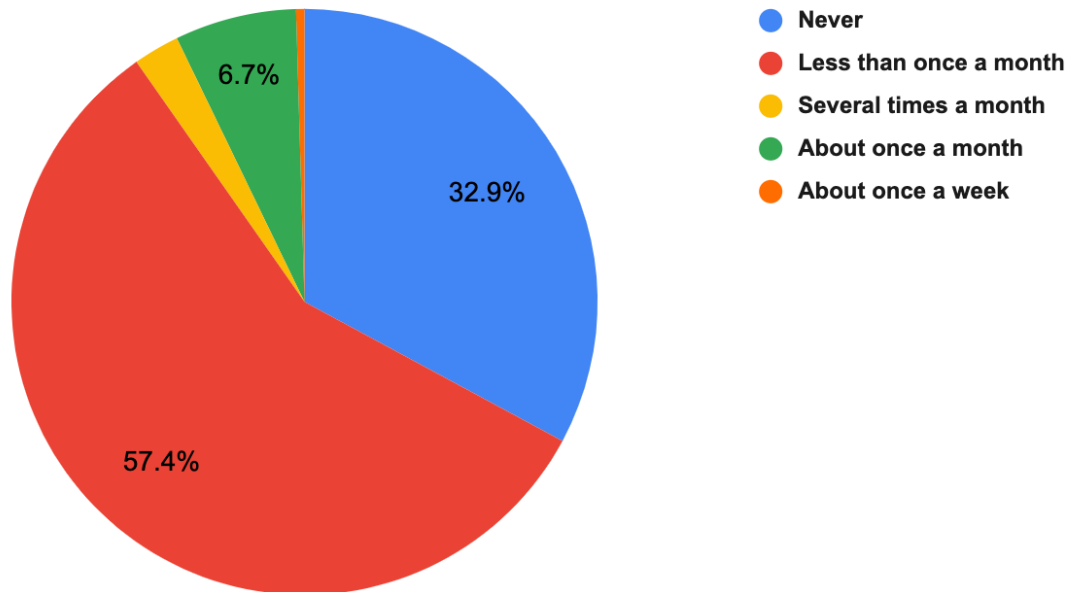


What is your primary reason for flying?

432 Responses

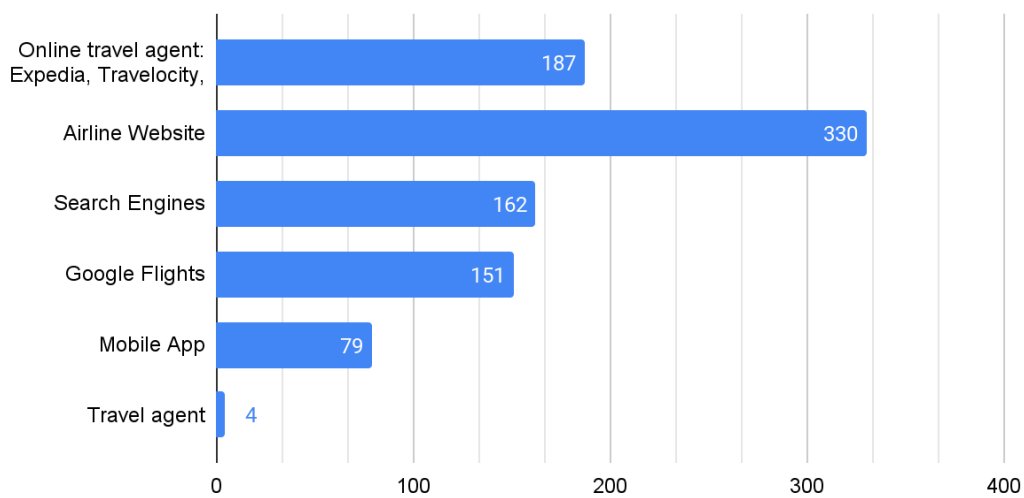


In the past year, how often do you fly?



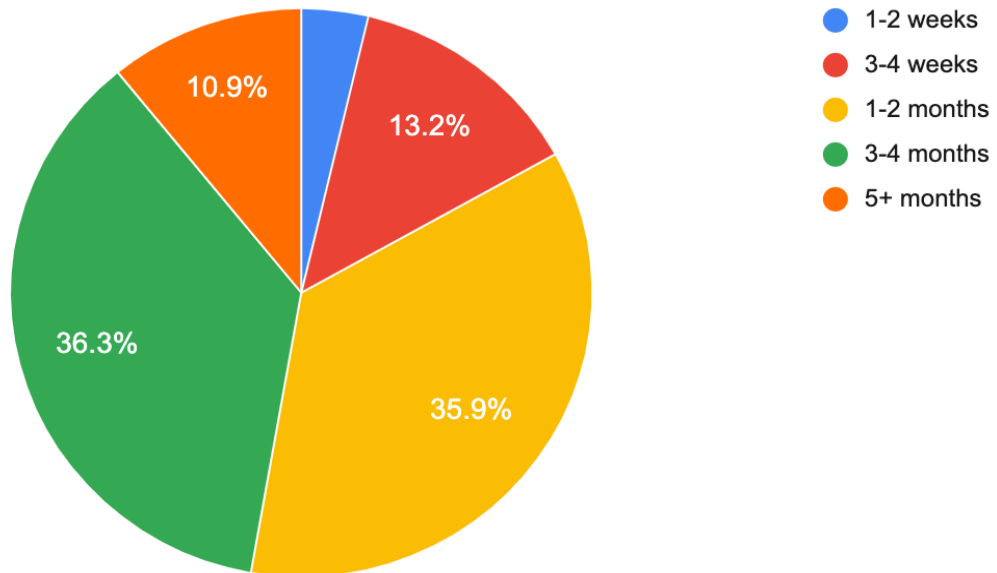
Making Flight Decisions

Which sources do you use when making an airport decision?

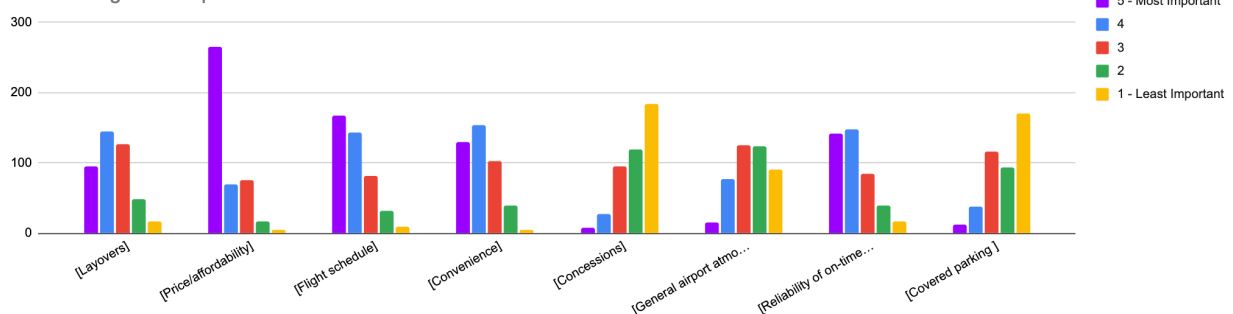


How Far in Advance do You Book Travel when Flying?

432 Responses

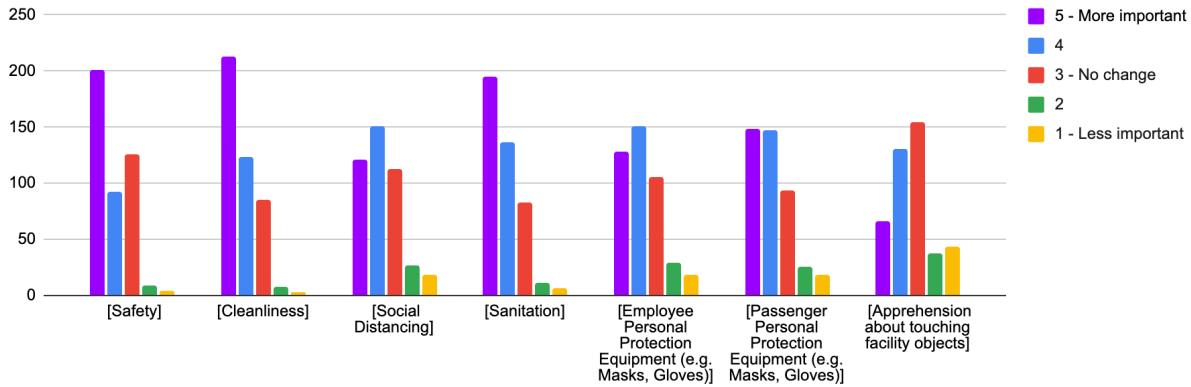


On a scale of 1-5, please rank how important each factor is when choosing an airport to fly out of, with 1 being least important and 5 being most important.

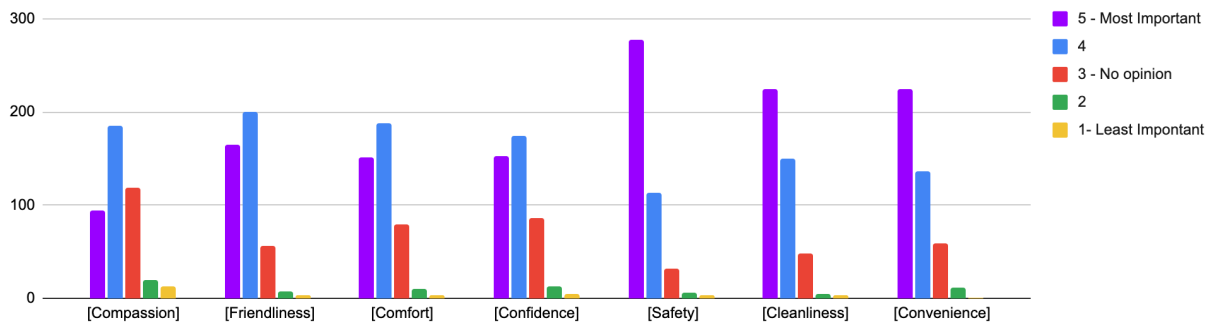


Customer Satisfaction

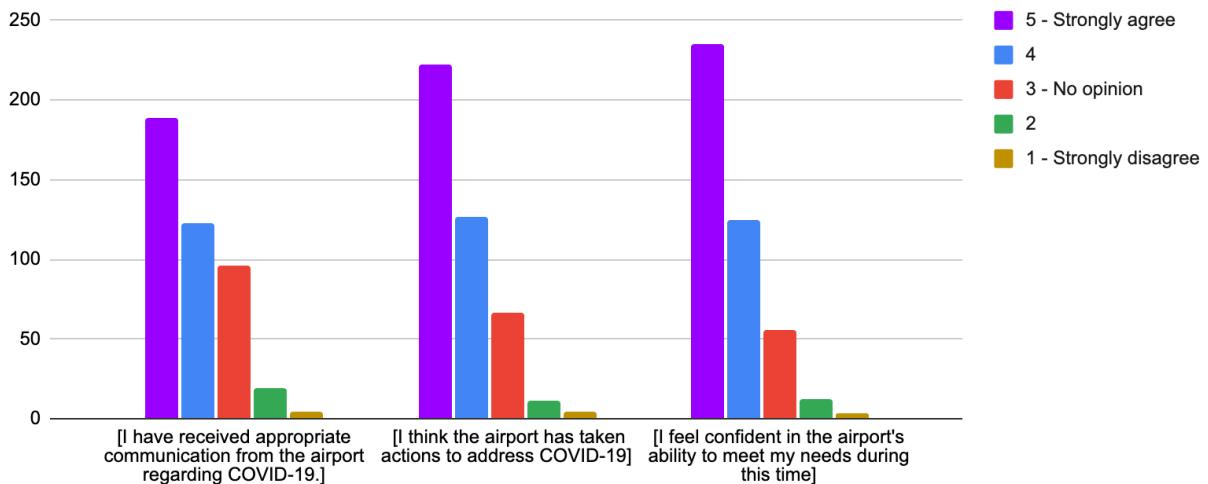
On a scale of 1-5, when thinking about your airport experience, please rank how each factor has changed in importance from last year to this year, with 1 being less important and 5 being more important.



On a scale of 1-5, how important are each of the following Duluth Airport attributes, with 1 being least important and 5 being most important.



On a scale of 1-5, how well do you agree with the following statements?



What are you expecting when you go back to the airport following the COVID-19 situation?

Common responses emphasize:

- Visible cleaning and a general feeling of cleanliness (135)
- Social distancing efforts being taken (21)
- Staff members and fliers wearing PPE (masks, gloves) (48)
- Sanitation of airport and airplanes, and availability of hand sanitizer (20)
- Safety being a top priority (42)
- Following recommended guidelines and/or updated precautionary measures in general (12)

Additional responses included:

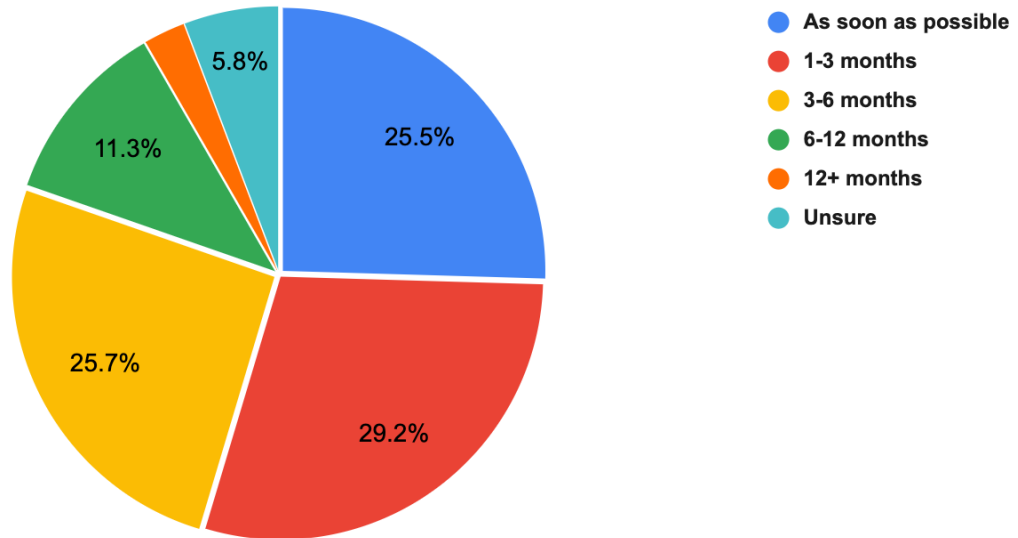
- Hoping to have shorter wait times or other inconveniences
- Expectations of more fliers and more available flights
- Concerns about flight prices.
- Few to no expectations of any significant change
- Expectations of a pleasant, friendly atmosphere and the same great customer service as always
- No concerns about the way DLH will handle the situation & trusting that DLH will do whatever is necessary

What steps can the airport take to make you feel confident in flying again?

Common responses emphasize:

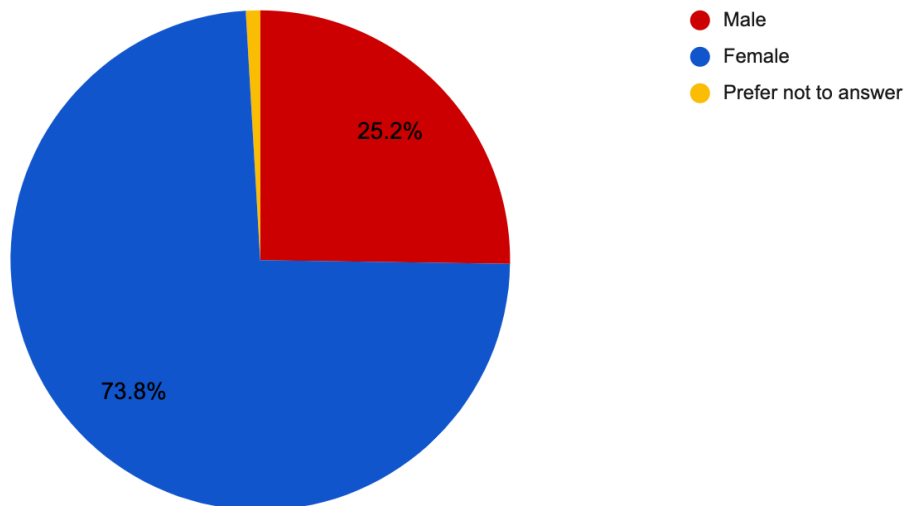
- Most people feel confident to fly again
- Keep doing what has already been done
- Seeing that extra cleaning and precautionary measures are being taken
- Providing hand sanitizer and wipes at the airport
- Seeing that masks and other PPE are being worn according to guidelines
- Practicing social distancing and other recommended guidelines
- Keeping flight prices low and affordable

When People Want to Fly Again

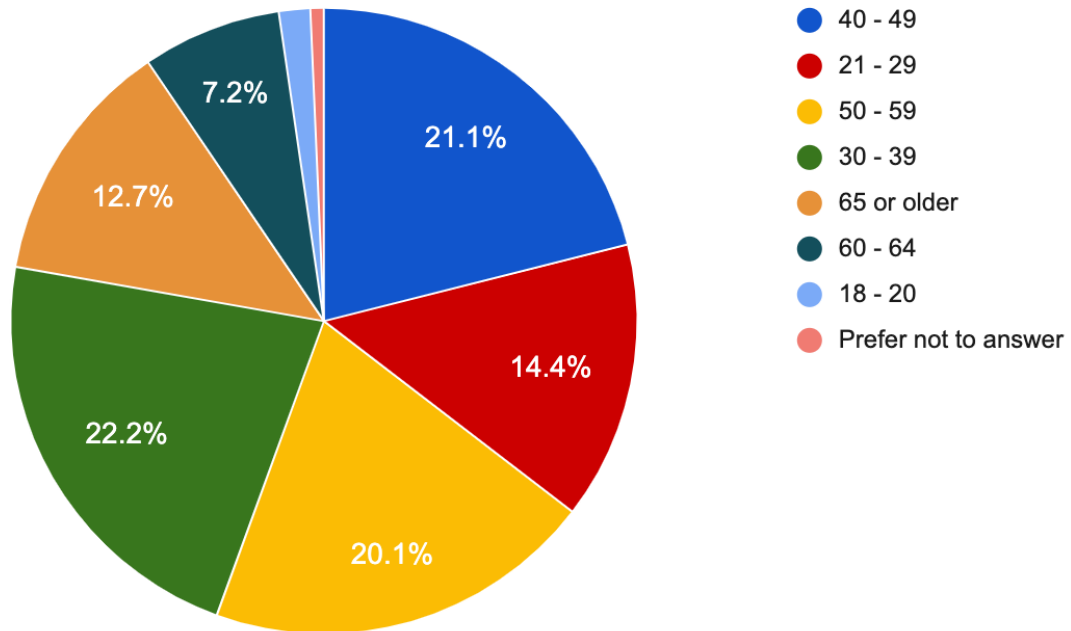


Demographic Questions:

What is your gender?



What is your age?



What city do you live in?

Common responses include:

- Duluth (180)
- Superior (39)
- Hermantown (24)
- Proctor (13)
- Minneapolis (15)
- Hibbing (5)
- Grand Rapids (12)
- Cloquet (11)
- Ashland (3)
- International Falls (4)
- Saginaw (4)
- St. Paul (3)
- Bayfield
- Silver Bay (3)
- Esko (9)

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IV. Appendix 2: Demographic Pivot Table Data

<i>In the past year, how often do you fly?</i>		<i>In the past year, how often do you fly?</i>					
<i>What is your gender?</i>	<i>What is your age?</i>	About once a month	About once a week	Less than once a month	Never	Several times a month	Grand Total
Female	18 - 20	1		3			4
	21 - 29	5		36	5	1	47
	30 - 39	3	1	42	18	2	66
	40 - 49	2		39	28		69
	50 - 59	5		46	18	1	70
	60 - 64			14	12		26
	65 or older	2		16	18		36
	Prefer not to answer					1	1
Female Total		18	1	196	100	4	319
Male	18 - 20			1	1	1	3
	21 - 29	2		9	4		15
	30 - 39	5	1	14	5	3	28
	40 - 49			11	9	2	22
	50 - 59	4		9	4		17
	60 - 64				5		5
	65 or older			7	11	1	19
Male Total		11	1	51	39	7	109
Prefer not to answer Total				1	3		4
Grand Total		29	2	248	142	11	432

<i>How far in</i>	<i>How far in</i>				
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<i>advance before your trip date do you book travel when flying?</i>		<i>advance before your trip date do you book travel when flying?</i>					
<i>What is your gender?</i>	<i>What is your age?</i>	1-2 months	1-2 weeks	3-4 months	3-4 weeks	5+ months	Grand Total
Female	18 - 20	3	1				4
	21 - 29	12	2	17	11	5	47
	30 - 39	19	2	28	9	8	66
	40 - 49	25	1	34		9	69
	50 - 59	30		18	16	6	70
	60 - 64	8		12	1	5	26
	65 or older	10	2	17	4	3	36
	Prefer not to answer				1		1
Female Total		107	8	126	42	36	319
Male	18 - 20	1		1	1		3
	21 - 29	9	1	2	3		15
	30 - 39	5	3	11	3	6	28
	40 - 49	13	2	3	3	1	22
	50 - 59	10	1	4	2		17
	60 - 64			3	1	1	5
	65 or older	7	1	7	2	2	19
Male Total		45	8	31	15	10	109
Prefer not to answer Total		3				1	4
Grand Total		155	16	157	57	47	432

<i>When do you</i>	<i>When do</i>		
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<i>plan on flying again?</i>		<i>you plan on flying again?</i>						
<i>What is your gender?</i>	<i>What is your age?</i>	1-3 months	12+ months	3-6 months	6-12 months	As soon as possible	Unsure	Grand Total
Female	18 - 20	1				3		4
	21 - 29	11	1	8	7	19	1	47
	30 - 39	20	1	14	6	24	1	66
	40 - 49	24	1	18	11	11	4	69
	50 - 59	21	1	16	8	17	7	70
	60 - 64	7	2	8	4	4	1	26
	65 or older	9	2	12	5	2	6	36
	Prefer not to answer			1				1
Female Total		93	8	77	41	80	20	319
Male	18 - 20			1		2		3
	21 - 29	6		4		5		15
	30 - 39	7	1	8	1	11		28
	40 - 49	5		9	1	6	1	22
	50 - 59	7	1	4		5		17
	60 - 64	1	1	2	1			5
	65 or older	6		5	4	1	3	19
Male Total		32	3	33	7	30	4	109
Prefer not to answer	30 - 39				1		1	2
	Prefer not to answer	1		1				2
Prefer not to answer Total		1		1	1		1	4
Grand Total		126	11	111	49	110	25	432



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What is your gender?	What is your age?	Are you aware of Sun Country's new direct service to and from Fort Myers, Florida and Phoenix, Arizona?		
		No	Yes	Grand Total
Female	18 - 20	1	3	4
	21 - 29	16	31	47
	30 - 39	10	56	66
	40 - 49	9	60	69
	50 - 59	5	65	70
	60 - 64	2	24	26
	65 or older	2	34	36
	Prefer not to answer		1	1
Female Total		45	274	319
Male	18 - 20	1	2	3
	21 - 29	6	9	15
	30 - 39	5	23	28
	40 - 49	1	21	22
	50 - 59	1	16	17
	60 - 64		5	5
	65 or older		19	19
Male Total		14	95	109
Prefer not to answer	30 - 39	1	1	2
	Prefer not to answer	1	1	2
Prefer not to answer Total		2	2	4
Grand Total		61	371	432



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How likely are you to use this new service?		How likely are you to use this new service?					
What is your gender?	What is your age?	1	2	3	4	5	Grand Total
Female	18 - 20				12	5	17
	21 - 29	1	12	30	52	85	180
	30 - 39	4	10	36	68	140	258
	40 - 49	3	8	42	80	140	273
	50 - 59	6	6	42	56	165	275
	60 - 64	1	6	15	36	40	98
	65 or older	1	10	18	40	70	139
	Prefer not to answer					5	5
Female Total		16	52	183	344	650	1245
Male	18 - 20	1		3		5	9
	21 - 29		8	3	16	30	57
	30 - 39	1	8	12	24	65	110
	40 - 49	4		9	36	30	79
	50 - 59	3		21	8	25	57
	60 - 64		2	3	4	10	19
	65 or older		4	18	36	10	68
Male Total		9	22	69	124	175	399
Prefer not to answer Total		2	2	3			7
Grand Total		27	76	255	468	825	1651