

Duluth International Airport

2022 Consumer Survey – Key Insights

I. Project Summary:

The Duluth International Airport conducted a survey of regional residents via email and social media in April of 2022. The survey received 493 responses, compared to 2021's survey with 432 responses. This year, a \$150 Delta gift card was offered as a prize to a random survey participant. 470 of the 493 participants opted in to provide their email address, and 432 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 2021 to 2022. 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 safer and 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 74%.
- Fliers are eager to get back to flying. 67.9% 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:

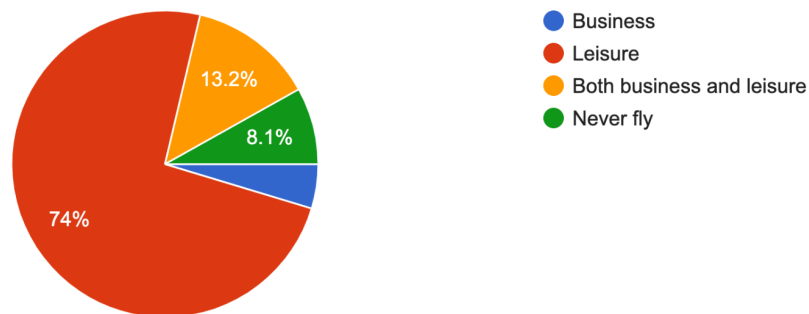
INSIGHT 1 - Flying for leisure is still #1

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

- 74% reported flying for leisure only
- 13.2% reported flying for both leisure and business
- 4.7% reported flying for business only
- 8.1% of people stated that they never fly

In the past year, what was your primary reason for flying?

493 responses



These findings indicate a minor shift from last year's survey, as more people are choosing not to fly at all. When asked the same question in 2021, participants reported that:

- 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

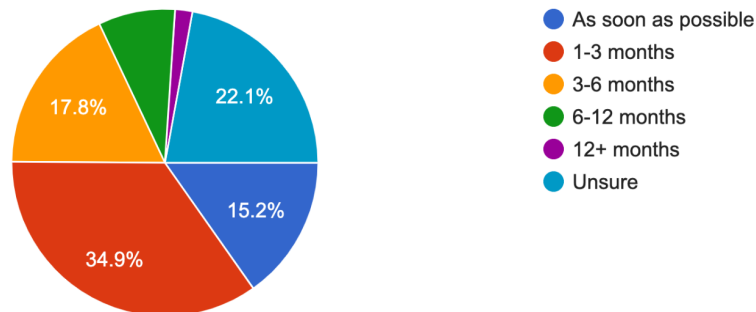
INSIGHT 2 - Travelers want to fly again soon, ideally within six months

When asked how soon they have a trip booked, fliers had a wide range of expectations, with 67.9% reporting they planned to return to flying within six months. This is down more than 10% from 2021. More specifically,

- 34.9% plan on flying again in 1-3 months
- 17.8% plan on flying again in 3-6 months
- 15.2% want to fly as soon as possible
- 8.1% plan on flying again in 6-12 months
- 22.1% are unsure if they will fly again
- 1.8% plan on flying in 12+ months

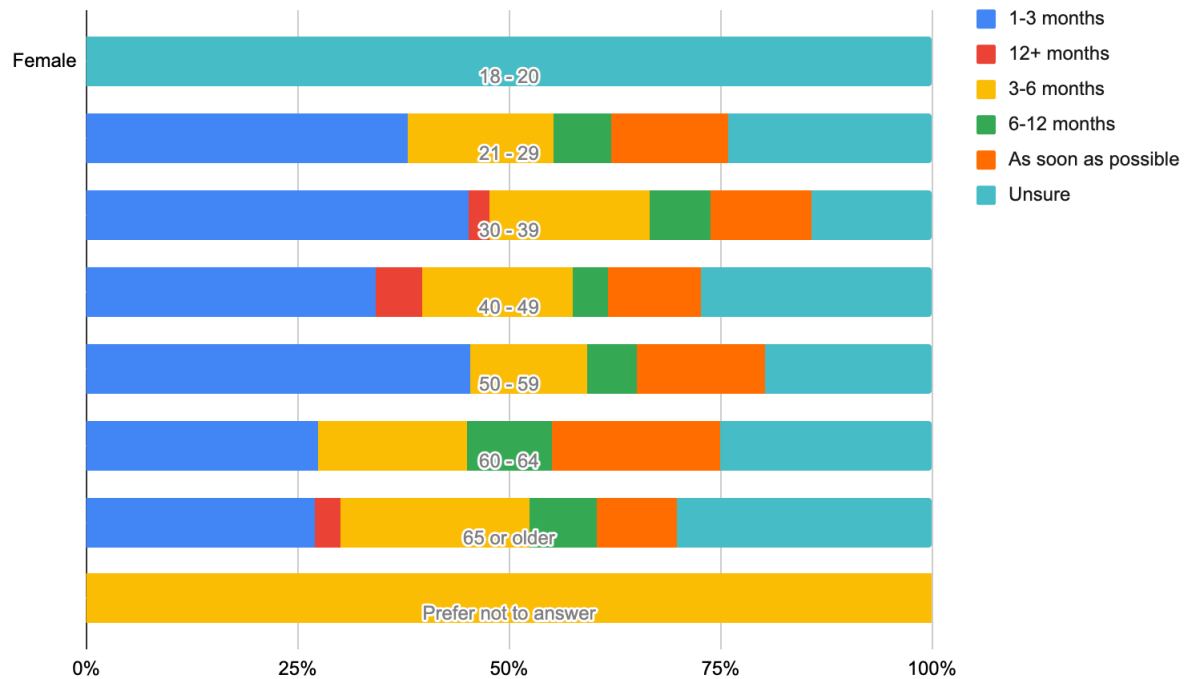
How soon do you have a trip booked?

493 responses



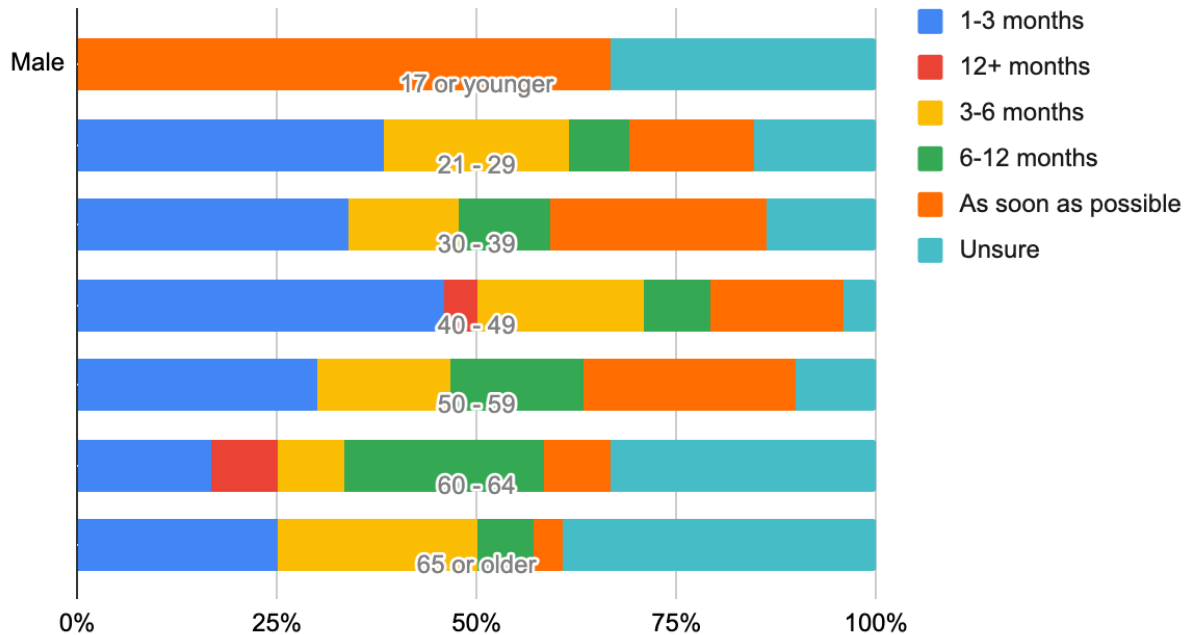
We examined this same question even further to see how different demographic groups (gender, age) responded.

Female | How soon do you have a trip booked?



A majority of women, 63.6% have flights booked in 1-6 months, 22.5% are unsure of when they will next book flights. Women ages 30-39 and 50-59 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 21-29 expect to wait 6-12 months before flying again.

Men | How soon do you have a trip booked?



Men ages 30-49 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.

INSIGHT 3 - Demographics only slightly affect how often people fly

In 2019, 2020, 2021 and 2022, we asked how often people fly during the previous year.

In 2022, we found that:

- 76.5% fly less than once per month
- 7.7% fly about once per month
- 3.9% fly several times per month
- 11% never fly

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 fly

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 fly

In 2019, we found that:

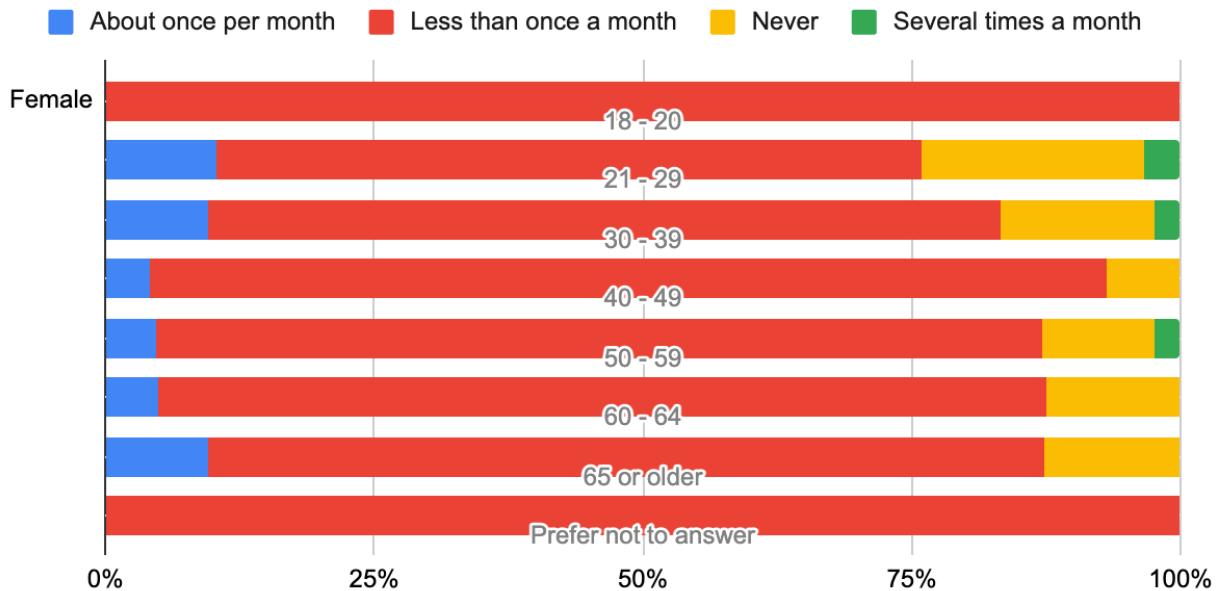
- 82% fly less than once per month
- 13% fly about once per month
- 3% fly several times each month
- 2% never fly

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.

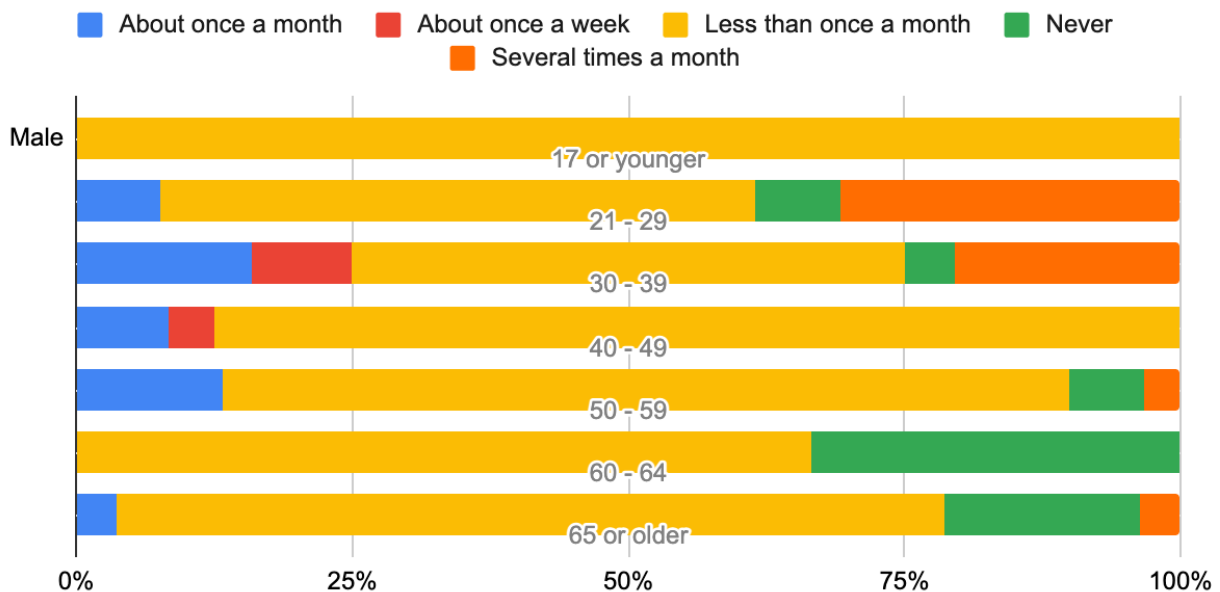
In the past year, how often did women fly?

Female



In the past year, how often did men fly?

Men



There is a small difference between the frequency of flights that men and women take. The majority of men and women fly less than once per month. Men ages 30-39, and women ages 50-59 are the largest demographic groups 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, 2021, and 2022.

In 2022, we found that:

- 6.9% book 1-2 weeks in advance
- 12.6% book 3-4 weeks in advance
- 35.7% book 1-2 months in advance
- 31.8% book 3-4 months in advance
- 13% book 5+ months in advance

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

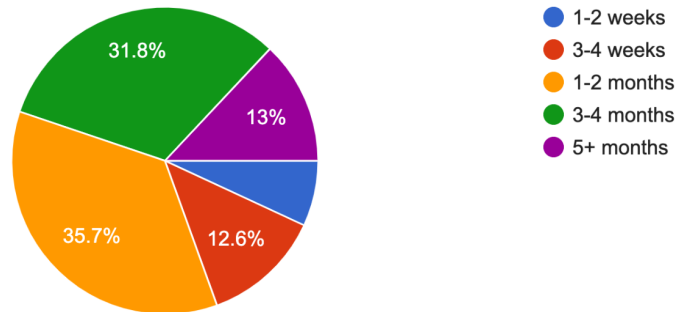
In 2019, we found that:

- 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 2022, the vast majority of people booked between 1 and 4 months in advance.

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

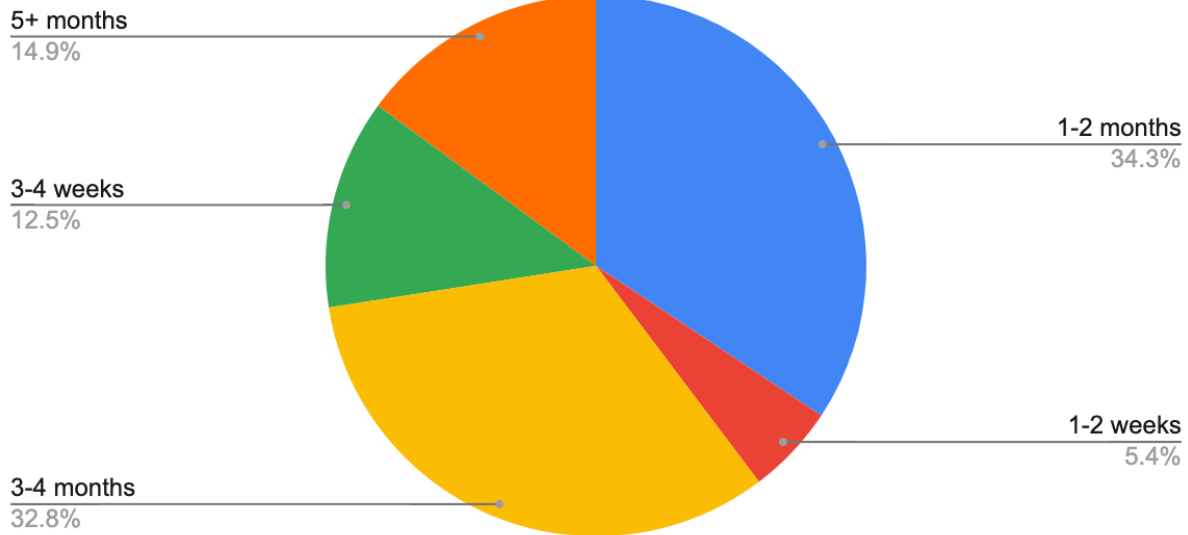
493 responses



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

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

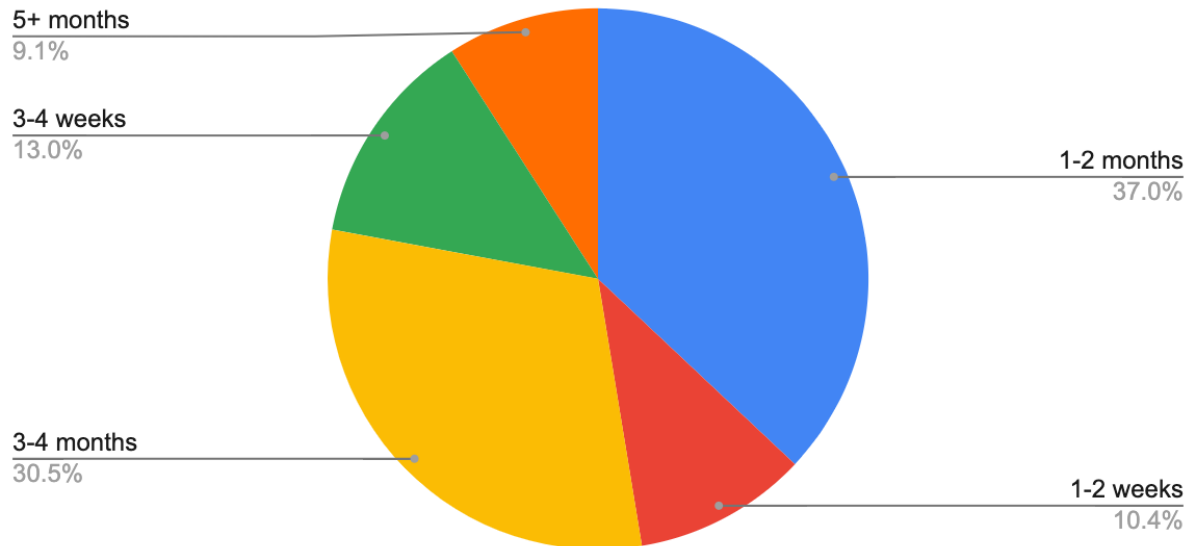
Female



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 2021, there is a significant upward trend for women booking 1-2 weeks in advance.

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

Male



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 (27.8%) or strongly agreed (48.9%) that they have received appropriate communication from the airport regarding COVID-19. 19.7% of people responded that they neither agreed or disagreed with the same statement. This is a significant increase in trust from people compared to 2021 (50%) at about 76.7% agreeing or strongly agreeing that they have received appropriate communication.

Similarly, a majority of respondents either agreed (30%) or strongly agreed (52.3%) that they thought the DLH airport had taken actions to address COVID-19. 14.2% of people responded that they neither agreed nor disagreed with the same statement.

An overwhelming majority of respondents either agreed (30.2%) or strongly agreed (57.4%) that they felt confident in the DLH airport's ability to meet their needs during this time. 7.7% of respondents neither agreed nor 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.



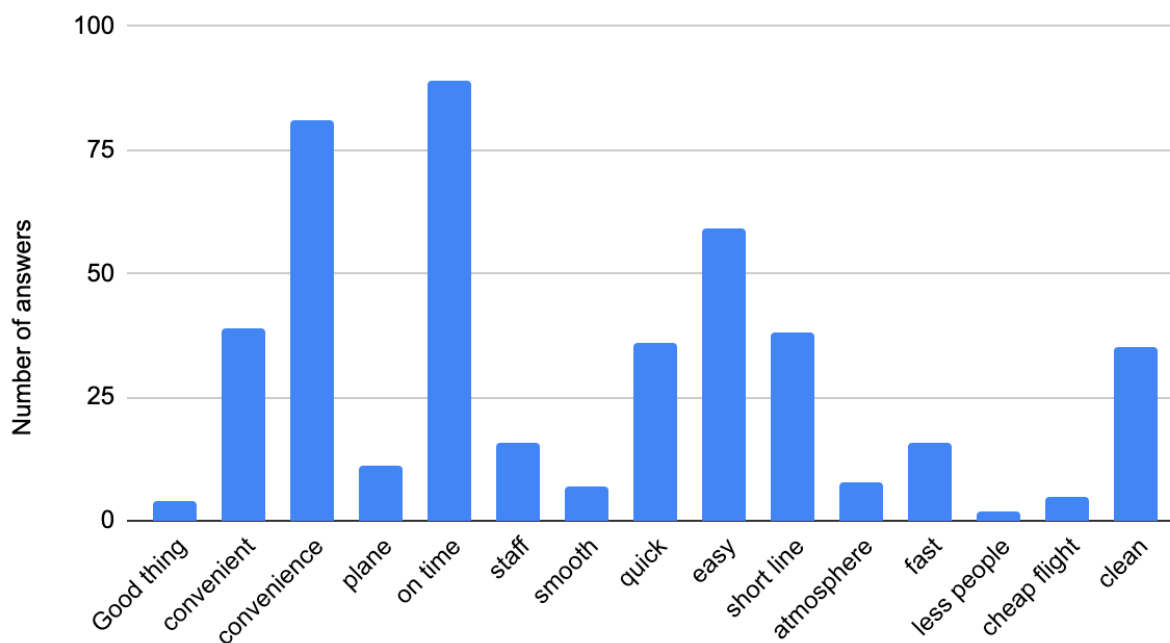
INSIGHT 7 - Most fliers expect flights to be on time, convenient and easy to board.

We asked fliers to share what they expect when they come to Duluth airport.

We found that:

- 26.9% say that Duluth Airport is incredibly convenient
- 13.2% say that the airport is easy to navigate
- 20.1% say flights are consistently on-time
- 7.8% say cleanliness should continue to be a priority

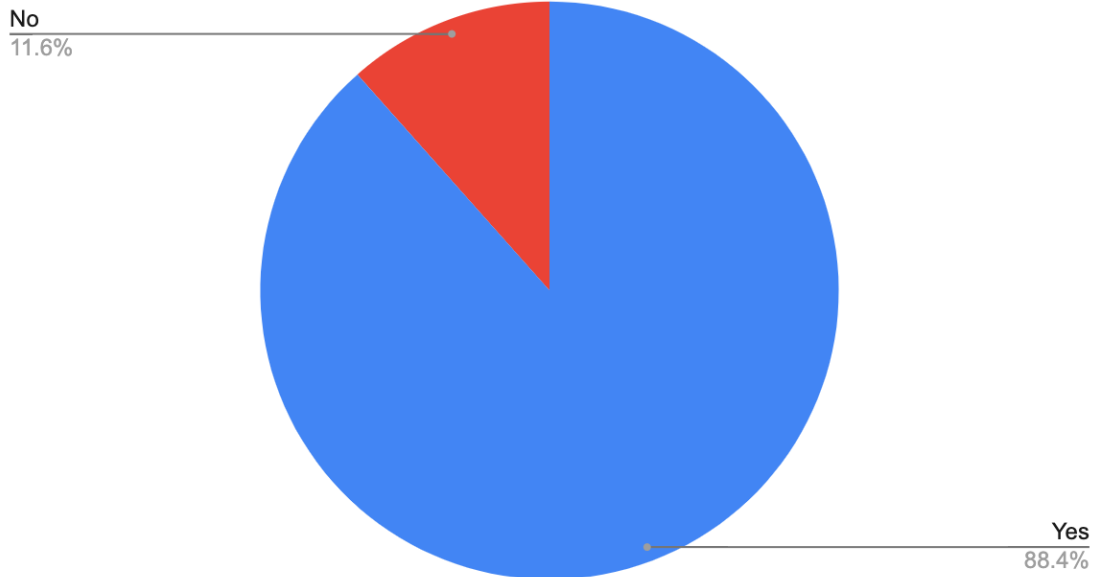
What are you expecting when you travel out of DLH?



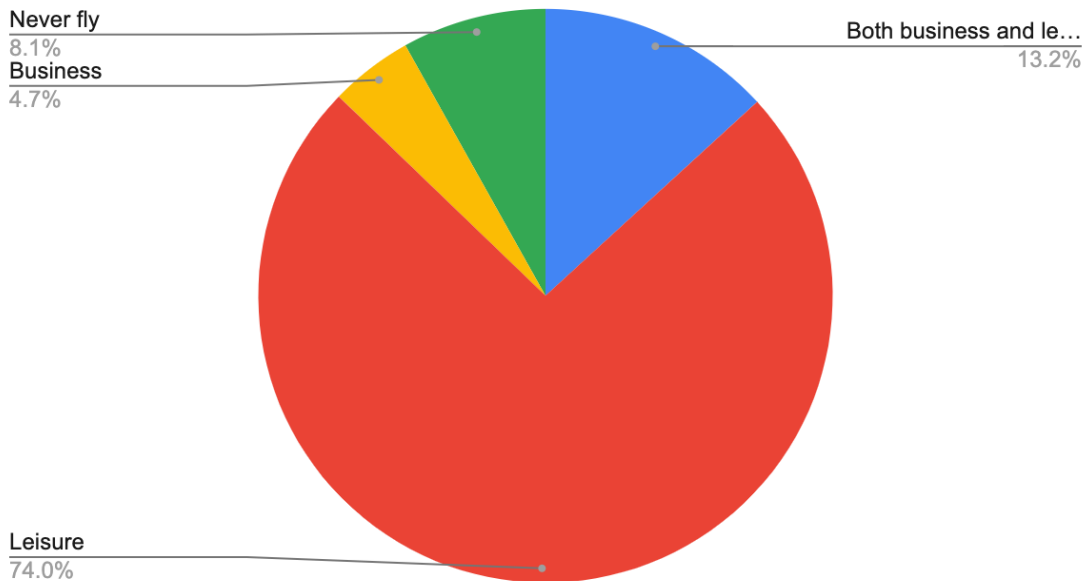
III. Appendix 1: Raw Survey Data

Flight Behaviors

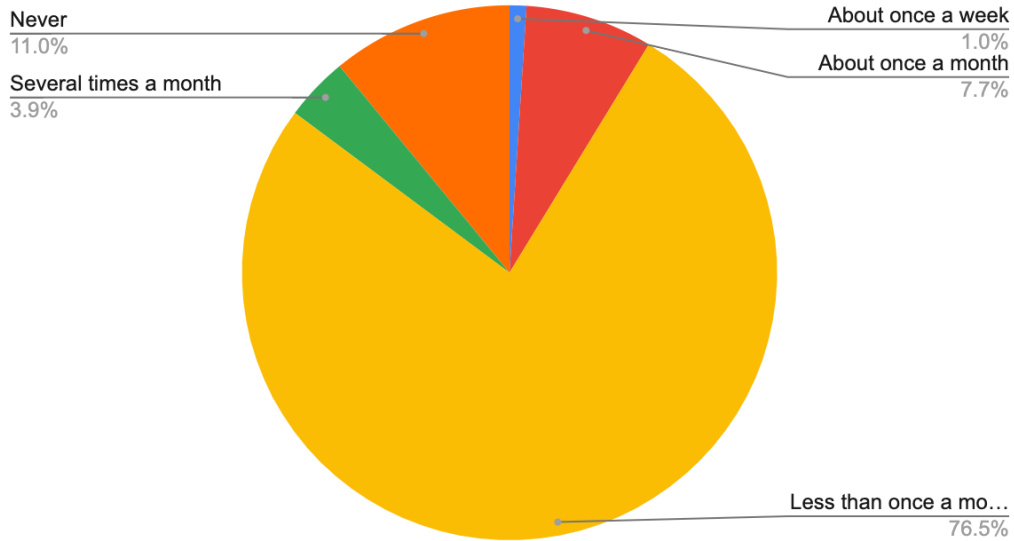
In the past year, have you flown for business or leisure?



In the past year, what was your primary reason for flying?

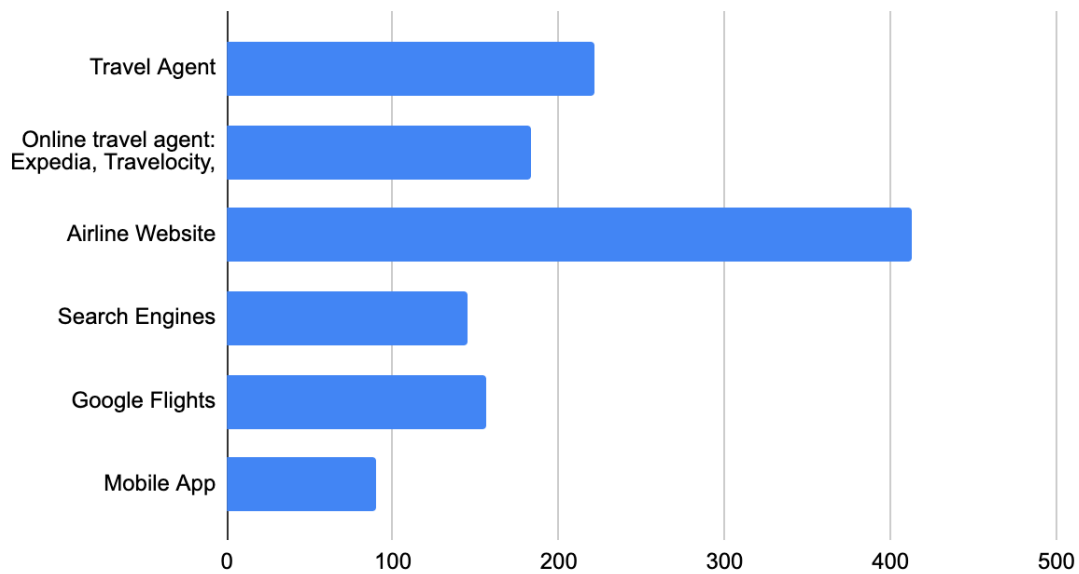


In the past year, how often did you fly?



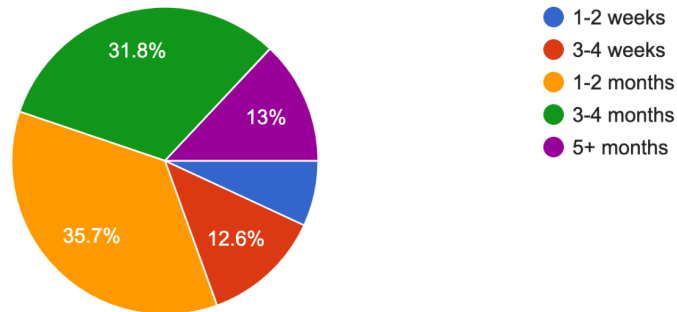
Making Flight Decisions

Which sources do you use when making travel plans?

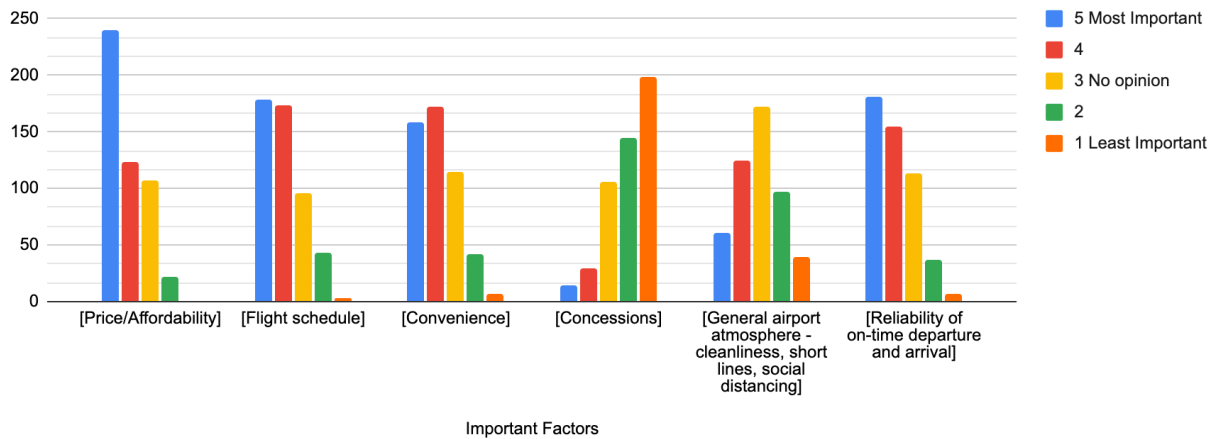


How far in advance before your trip date do you book travel when flying?

493 responses

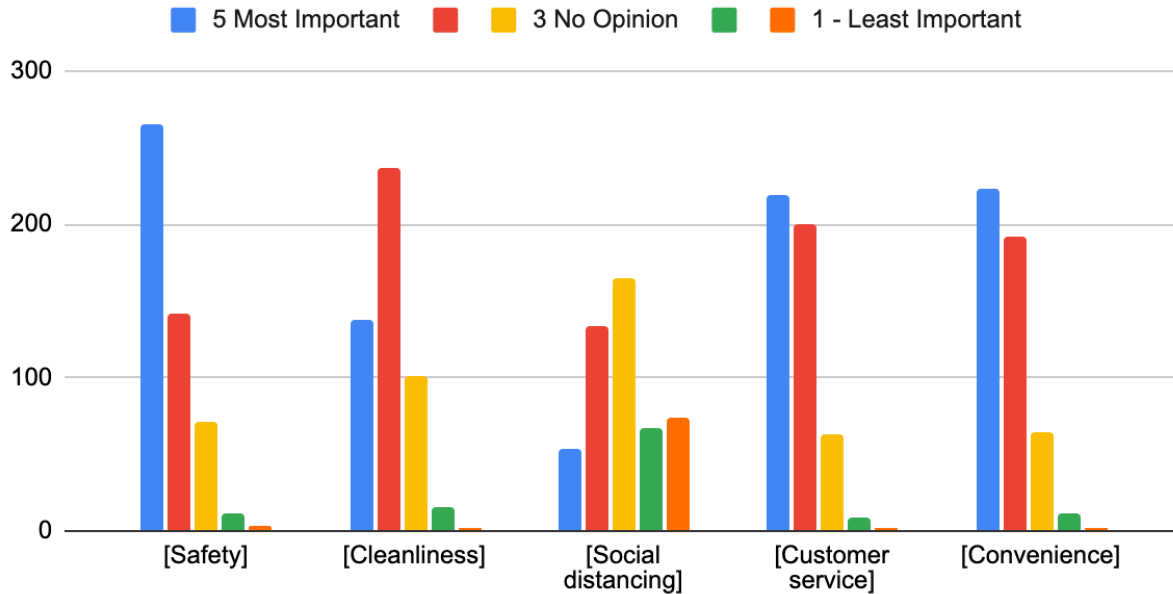


Rank how important each factor is when choosing an airport to fly out of

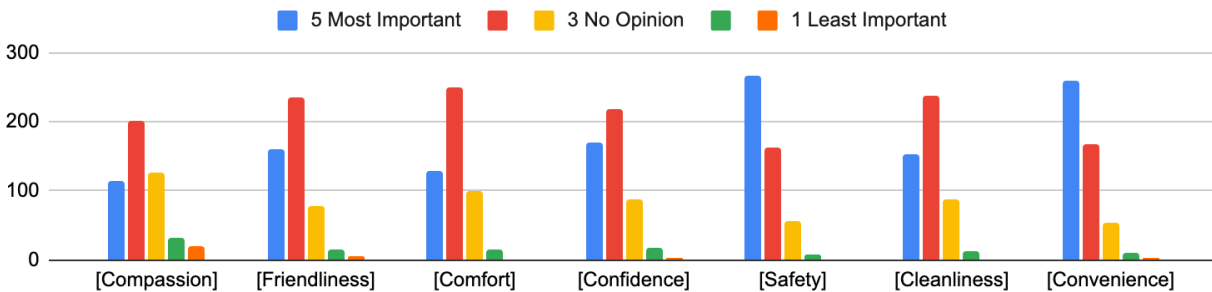


Customer Satisfaction

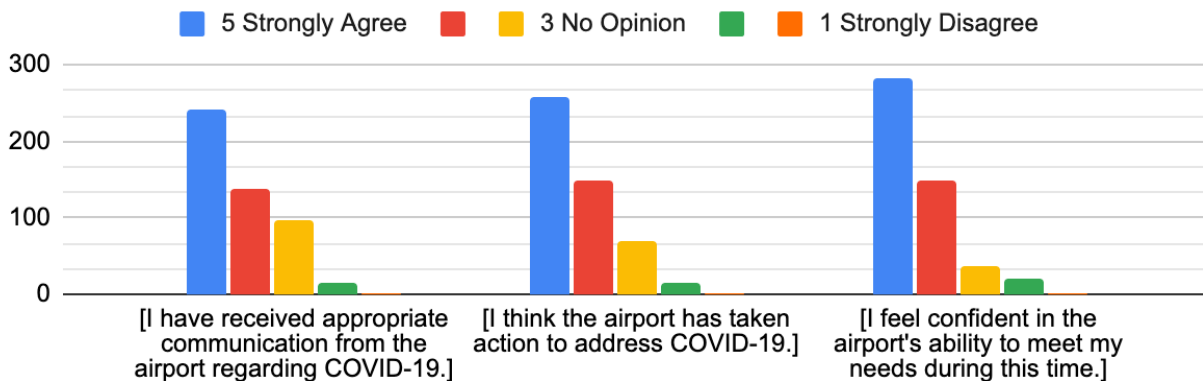
When thinking about your airport experience, rank overall importance of each



How important are each of the following Duluth Airport attributes



How well do you agree with the following statements?

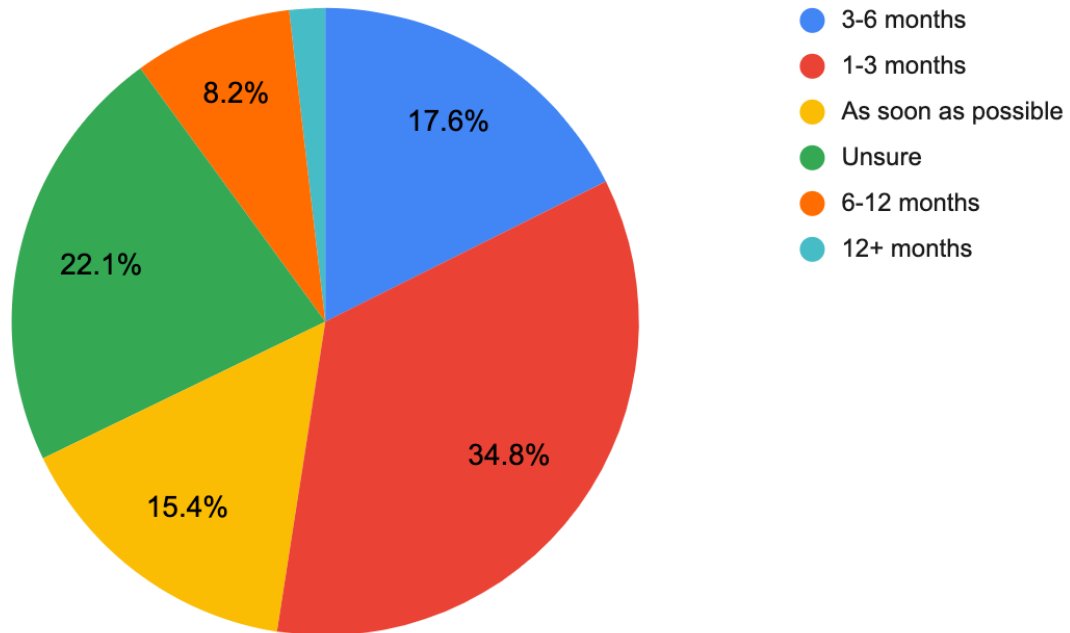


What steps can the airport take to make you feel confident in flying again?

Common responses emphasize:

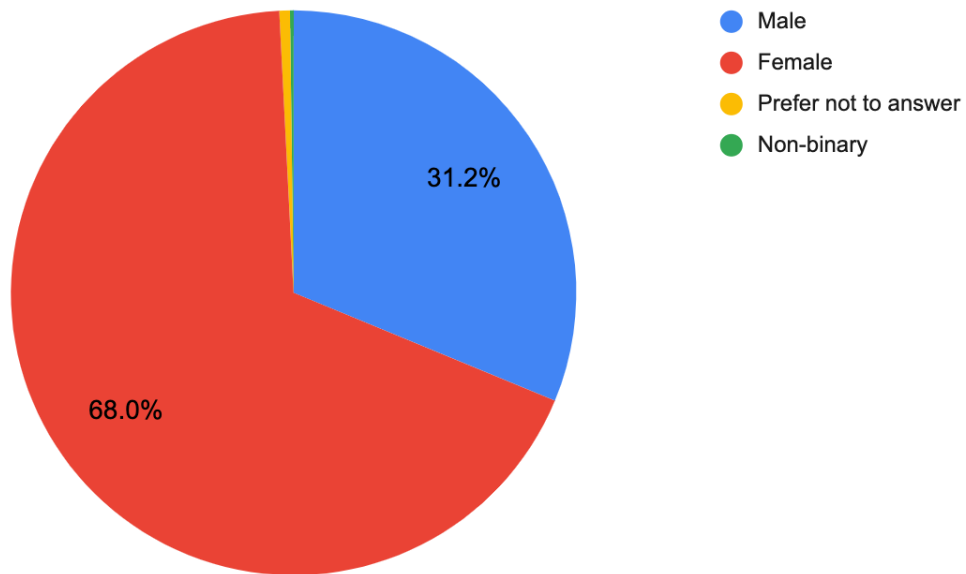
- Most people feel confident to fly again
- Keep doing what has already been done
- Keep flight prices low and affordable
- Lessen rules surrounding COVID-19

How soon do you have a trip booked?

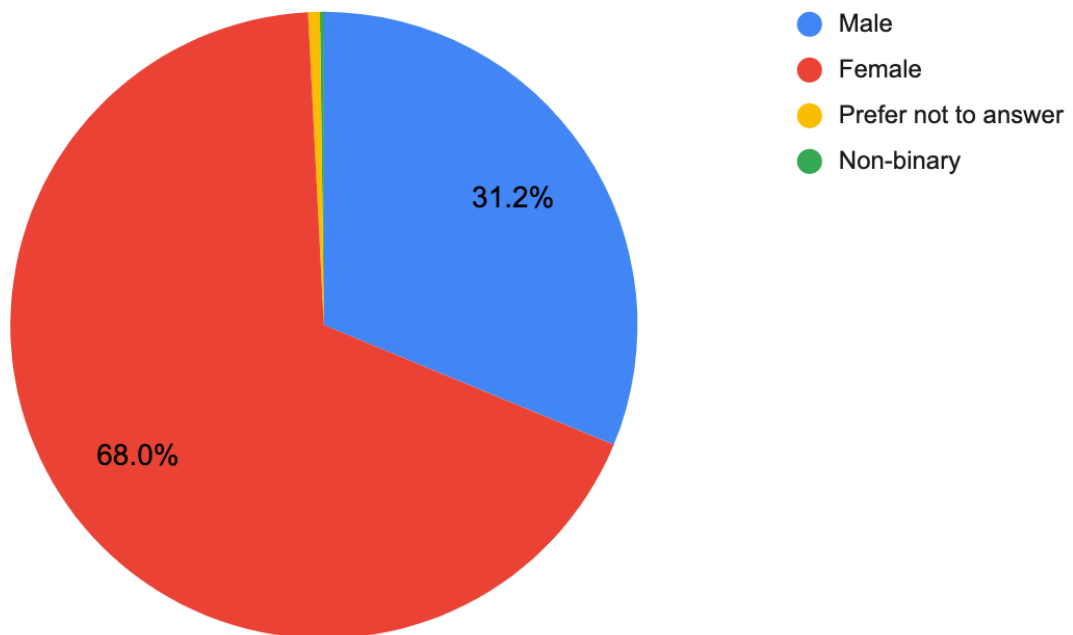


Demographic Questions:

What is your gender?



What is your gender?



What city do you live in?

Common responses include:

- Duluth (233)
- Superior (43)
- Hermantown (28)
- Proctor (15)
- Two Harbors (8)
- Minneapolis (5)
- Hibbing (6)
- Grand Rapids (3)
- Cloquet (11)
- Esko (10)
- Ashland (6)
- Barnum (5)
- International Falls (2)
- Saginaw (4)
- Gordon (3)
- Carlton (3)
- St. Paul (3)
- Bayfield (2)
- Cromwell (2)
- Eagan (2)
- Cottage Grove (2)
- Washburn (2)
- Washington, DC (3)
- Iron River (2)
- Big Lake (2)
- Chicago (2)
- Denver (2)
- Eveleth (2)

IV. Appendix 2: Demographic Pivot Table Data

<i>How soon do you have a trip booked?</i>		<i>How soon do you have a trip booked?</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
	21 - 29	11			5	2	4	7
	30 - 39	19	1	8	3	5	6	42
	40 - 49	25	4	13	3	8	20	73
	50 - 59	39		12	5	13	17	86
	60 - 64	11		7	4	8	10	40
	65 or older	17	2	14	5	6	19	63
	Prefer not to answer				1			1
Female Total		122	7	60	22	44	80	335
Male	17 or younger					2	1	3
	21 - 29	5		3	1	2	2	13
	30 - 39	15		6	5	12	6	44
	40 - 49	11	1	5	2	4	1	24
	50 - 59	9		5	5	8	3	30
	60 - 64	2	1	1	3	1	4	12
	65 or older	7		7	2	1	11	28
Male Total		49	2	27	18	30	28	154
Grand Total		171	9	87	40	74	108	489

<i>In the past year, how often did you</i>	<i>In the past year, how often did you</i>		
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<i>fly?</i>		<i>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		1
	21 - 29	3		19	6	1	29
	30 - 39	4		31	6	1	42
	40 - 49	3		65	5		73
	50 - 59	4		71	9	2	86
	60 - 64	2		33	5		40
	65 or older	6		49	8		63
	Prefer not to answer			1			1
Female Total		22		270	39	4	335
Male	17 or younger			3			3
	21 - 29	1		7	1	4	13
	30 - 39	7	4	22	2	9	44
	40 - 49	2	1	21			24
	50 - 59	4		23	2	1	30
	60 - 64			8	4		12
	65 or older	1		21	5	1	28
Male Total		15	5	105	14	15	154
Grand Total		37	5	375	53	19	489

<i>How far in advance before your trip date do you book travel when</i>	<i>How far in advance before your trip date do you book travel when</i>				
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<i>flying?</i>	<i>flying?</i>					
<i>What is your gender?</i>	1-2 months	1-2 weeks	3-4 months	3-4 weeks	5+ months	Grand Total
Female	115	18	110	42	50	335
Male	57	16	47	20	14	154
Grand Total	172	34	157	62	64	489

<i>Which sources do you use when making travel plans? Check all that apply.</i>	<i>What is your gender?</i>				
<i>What is your age?</i>	Female	Male	Non-binary	Prefer not to answer	Grand Total
17 or younger			2		2
18 - 20	1				1
21 - 29	21	9	1		26
30 - 39	21	26			39
40 - 49	35	13			39
50 - 59	37	18			41
60 - 64	21	7			24
65 or older	22	15			28
Prefer not to answer	1			3	4
Grand Total	72	50	1	3	88

<i>In the past year, what was your</i>	<i>In the past year, what was your</i>			
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<i>primary reason for flying?</i>		<i>primary reason for flying?</i>				
<i>What is your gender?</i>	<i>What is your age?</i>	Both business and leisure	Business	Leisure	Never fly	Grand Total
Female	18 - 20	1				1
	21 - 29	1	3	19	6	29
	30 - 39	11		26	5	42
	40 - 49	7	2	59	5	73
	50 - 59	13	3	63	7	86
	60 - 64	3		34	3	40
	65 or older	3	2	53	5	63
	Prefer not to answer			1		1
Female Total		39	10	255	31	335
Male	17 or younger			3		3
	21 - 29		2	11		13
	30 - 39	14	7	22	1	44
	40 - 49	1	3	20		24
	50 - 59	6	1	21	2	30
	60 - 64	2		8	2	12
	65 or older	3		21	4	28
Male Total		26	13	106	9	154
Non-binary	21 - 29			1		1
Non-binary Total				1		1
Prefer not to answer	Prefer not to answer			3		3
Prefer not to answer Total				3		3
Grand Total		65	23	365	40	493

<i>How far in advance before your</i>	<i>How far in advance before your</i>				
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<i>trip date do you book travel when flying?</i>		<i>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	1					1
	21 - 29	9	1	8	6	5	29
	30 - 39	12	2	21	3	4	42
	40 - 49	25		24	7	17	73
	50 - 59	30	6	28	13	9	86
	60 - 64	14	6	8	4	8	40
	65 or older	23	3	21	9	7	63
	Prefer not to answer	1					1
Female Total		115	18	110	42	50	335
Male	17 or younger	2			1		3
	21 - 29	2	1	6	3	1	13
	30 - 39	13	9	12	7	3	44
	40 - 49	13	2	7		2	24
	50 - 59	15	1	8	5	1	30
	60 - 64	4	1	4		3	12
	65 or older	8	2	10	4	4	28
Male Total		57	16	47	20	14	154
Non-binary	21 - 29	1					1
Non-binary Total		1					1
Prefer not to answer	Prefer not to answer	3					3
Prefer not to answer Total		3					3
Grand Total		176	34	157	62	64	493