



BREAKFAST & BUSINESS

2024 Quarter 3

Focus: Air Service in Marquette County



WELCOME

- ▶ Special Guest: Chris Holman, Michigan Business Network
- ▶ Setting the Stage: Marquette Sawyer Regional Airport
- ▶ What's Happening: Active Efforts to Enhance Air Service
- ▶ Wrap Up



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BREAKFAST & BUSINESS

2024 Quarter 3

Focus: Air Service in Marquette County



Marquette Sawyer Regional Airport

Past Capital Improvement Costs

Air Field Improvements:

- 2015/2016 - Airport Security and Fencing Improvements \$ 753,148
- 2017/2018 – Runway rehabilitation/repaving \$ 5,577,741
- 2018/2019 – Air carrier apron repairs \$ 140,000
- 2022/2024 – Taxiway pavement rehabilitation \$ 9,491,235
- **Total \$15,962,124**

Snow Removal Equipment and Facilities:

- 2018/2019 – Runway snow broom (Local Only funded) \$ 612,000
- 2019/2020 – Runway snow plow with liquid spreader \$ 519,130
- 2020/2021 – Runway liquid storage facility and airfield pavement maintenance \$ 474,793
- 2023/2024- Cares Act Snow removal equipment purchase \$ 1,680,000
- Total \$3285,923

Facility Improvements:

- 2019/2023 – Hangar expansion and improvements (Hangar 665) \$10,346,434
- 2022/2024 – Hangar improvements (Fire Suppression Hangar 664) \$ 3,000,000
- 2023/2024 - Building 608 improvements \$ 3,505,417
- 2023/2024 – Building demolition of 14 buildings \$ 3,384,708
- Total \$23,522,482

The total cost of the listed items - \$39,754,606



Marquette Sawyer Regional Airport

Future Projects

Marquette Sawyer Regional Airport (MSRA) continues to plan for improvements throughout the operation. Over the next three years, MSRA is planning for projects accounting for over \$23 million. The projects address:

- Airfield Parking Aprons, Taxiways and Runways \$10,965,096
- Potential Terminal Construction Work \$17,364,934
- Air Traffic Control Tower work \$ 3,500,000
- Aircraft Rescue Equipment \$1,111,112

These projects are contingent on FAA Funding. These requests are based on available grants with an estimated local share of \$1,136,832.

Airport Annual Operating Budget

2023- \$2,591,144
2024 - \$2,709,594

The budget revenue is generated through various revenue streams, i.e. leases, parking fees, and fuel flowage fees. The operation does not cash flow every year, but over these last few years, Marquette County has been able to account for much of the operating costs of the Cares Act Grant.

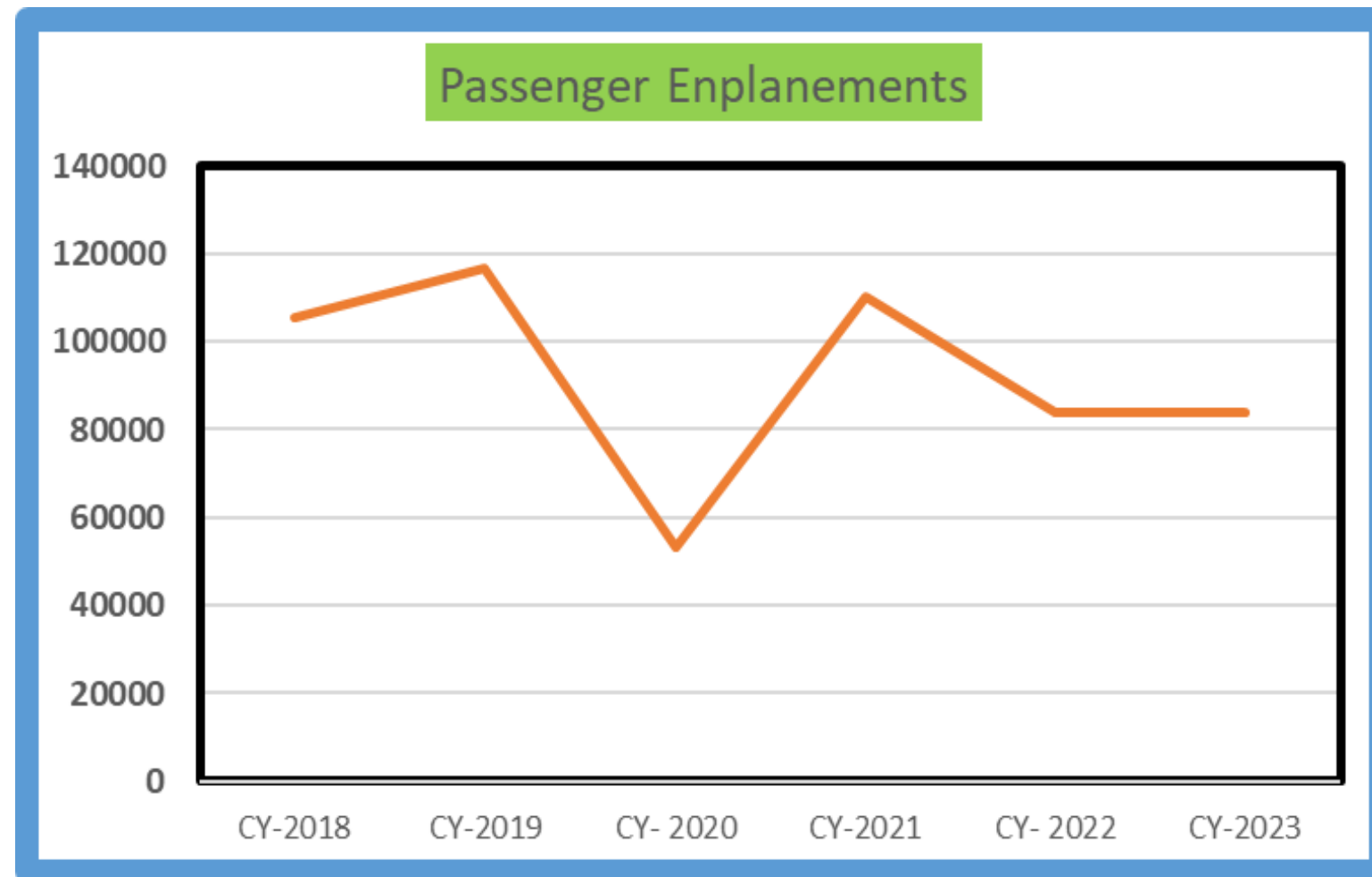


Marquette Sawyer Regional Airport

Passenger Data

Before the Covid Pandemic MSRA was showing continued growth and exceeded 100,000 total passengers for the third year in a row since 2011.

Year	# of Pax
CY-2018	105,525
CY-2019	116,856
CY- 2020	53,262
CY-2021	109,991
CY- 2022	83,776
CY-2023	84,059

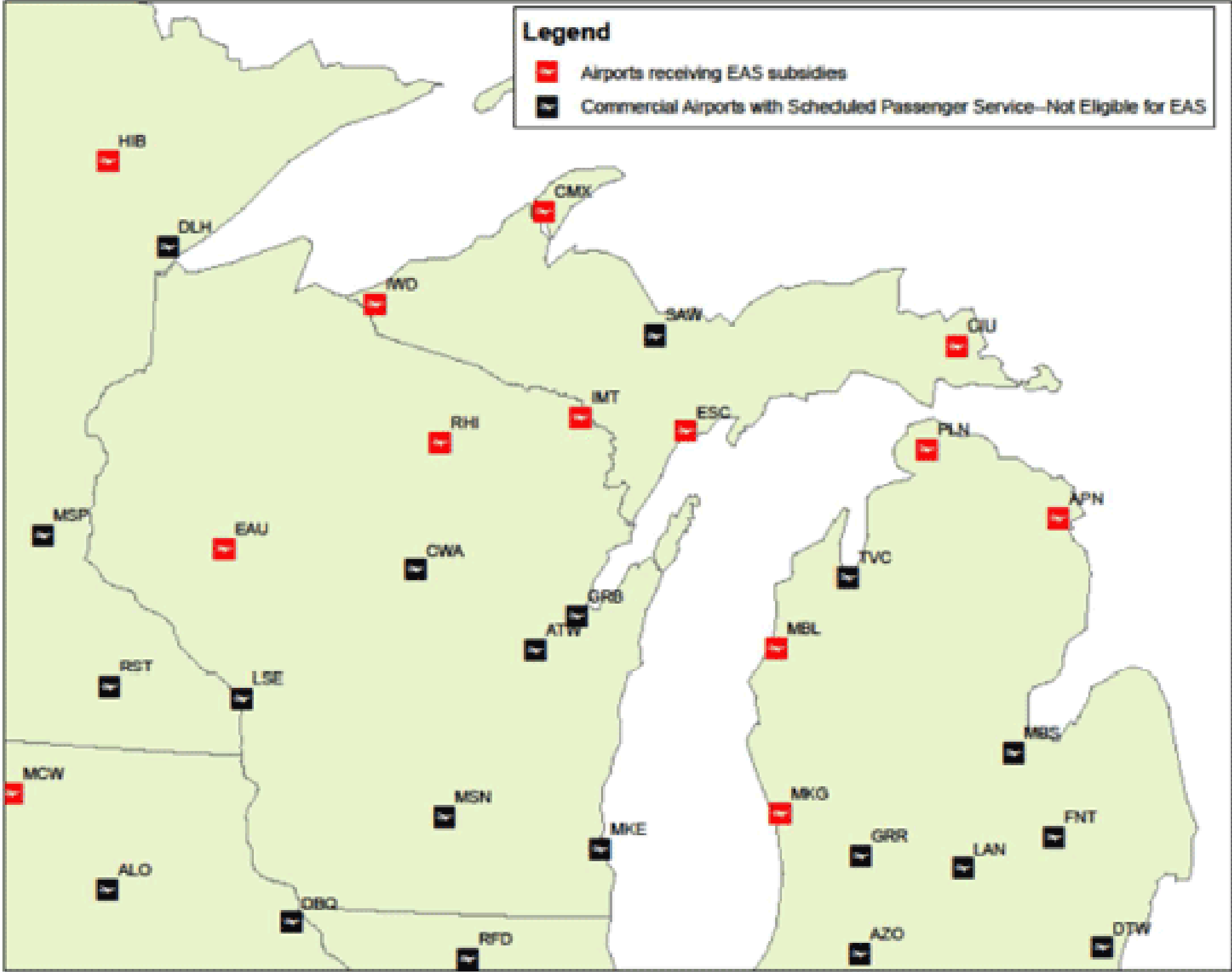


We attribute the passenger decline to the Pandemic and the significant reduction in the flight schedule. The elimination of the MSP flight and the Detroit Flight has caused a significant reduction in passenger traffic.

One benefit is that both air carriers have upgraded their aircraft to larger ERJ 170 (69 seats) with American Airlines and the CRJ 900 (70 seats) with Delta Air Lines flights.



Marquette Sawyer Regional Airport



- *Marquette Sawyer Regional the Only Non-Essential Air Service Airport in the Upper Peninsula*
- *EAS subsidizes air carriers serving EAS airports in the U.P. over \$20 million annually.*



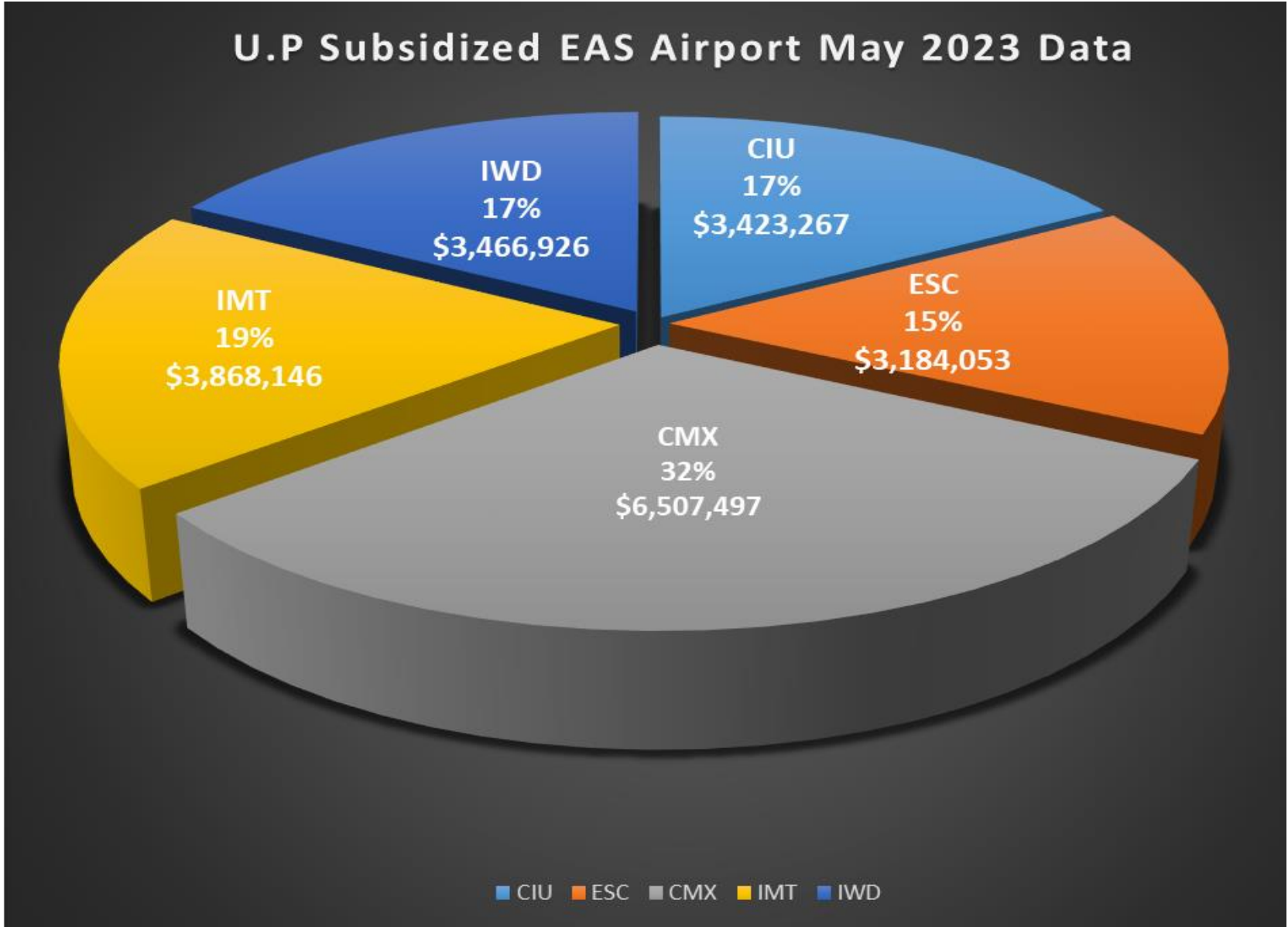
Marquette Sawyer Regional Airport

Essential Air Service for the Upper Peninsula

This program dates back to 1978 with the Airline Deregulation Act (ADA). Currently, there are six airports providing air service for the Upper Peninsula. Of the six airports, five are subsidized through the US DOT to the tune of approximately \$20,449,889.

Annual Subsidized EAS

CIU	\$3,423,267
ESC	\$3,184,053
CMX	\$6,507,497
IMT	\$3,868,146
IWD	\$3,466,926



Taking Action

Demand and Leakage Study

The LSCP, partnering with key organizations – including Marquette County/Sawyer Regional Airport, Eagle Mine, Travel Marquette, and the LSCP Chairman’s Circle Fund – supported creation of a Demand and Leakage Study which puts numbers to the actual demand vs use of Marquette Sawyer. This data is critical to making a case to airlines that there is pent up, untapped demand. This was completed in January.

Business Needs Survey

In April, the LSCP released a public survey to document demand from the business community in particular. This was part of putting together an application for a grant from MDOT for \$750,000 to support a Minimum Revenue Guarantee (MRG).

Airport Operations Assessment


A group of private-public partners supported an assessment by Baldwin & Associates to review existing airport operations and make recommendations for efforts to provide an enhance quality of service. The results of this assessment were delivered in early July.

Next Up: Visits with Airlines

The LSCP and a small group of public and private partners are going to meet directly with airlines to make the case for additional air service. An initial meeting is expected in early August with potentially more visits in September.



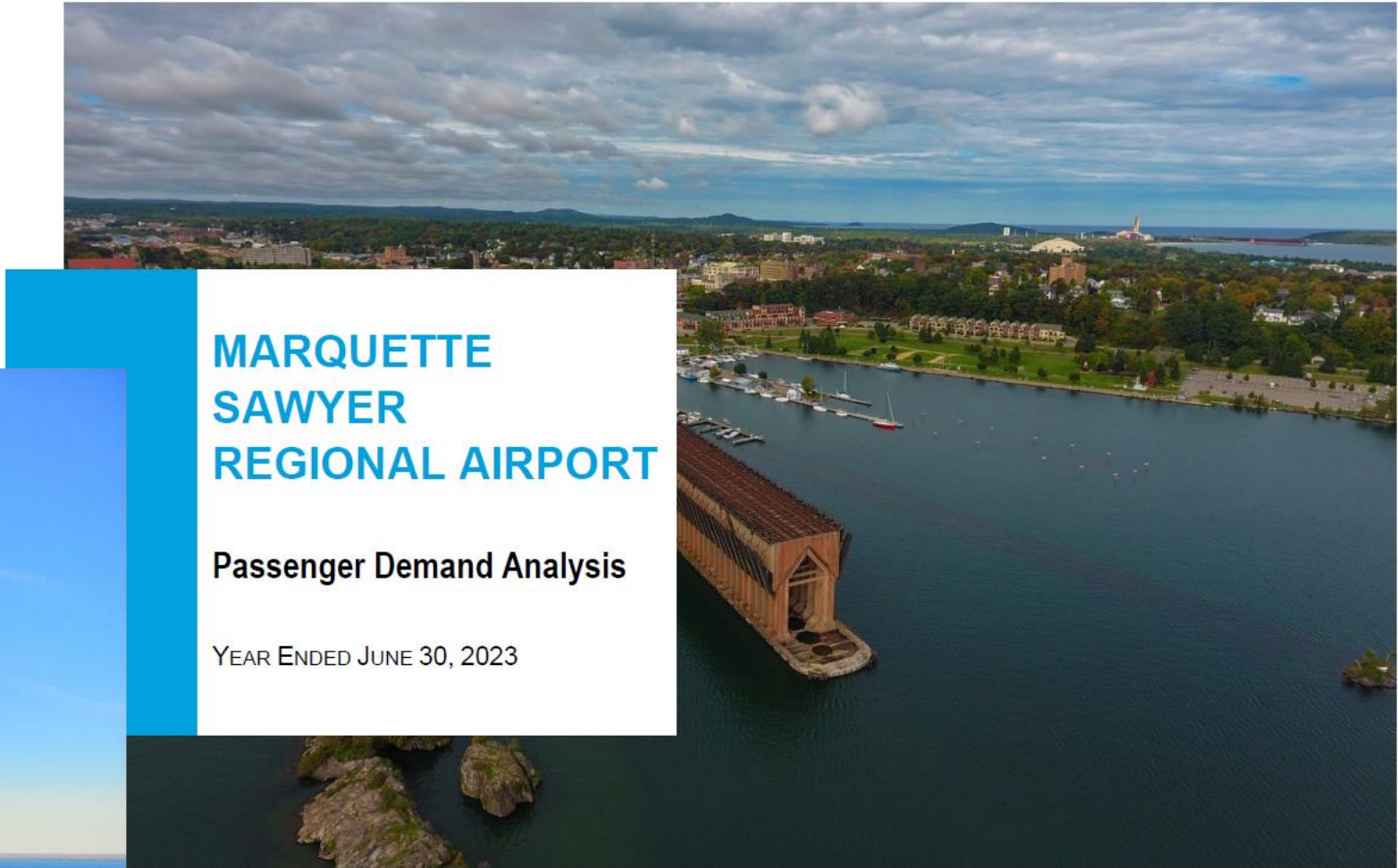
Demand and Leakage Study



**MARQUETTE
SAWYER REGIONAL
AIRPORT**

True Visitation Estimate

CALENDAR YEAR 2023



**MARQUETTE
SAWYER
REGIONAL AIRPORT**

Passenger Demand Analysis

YEAR ENDED JUNE 30, 2023



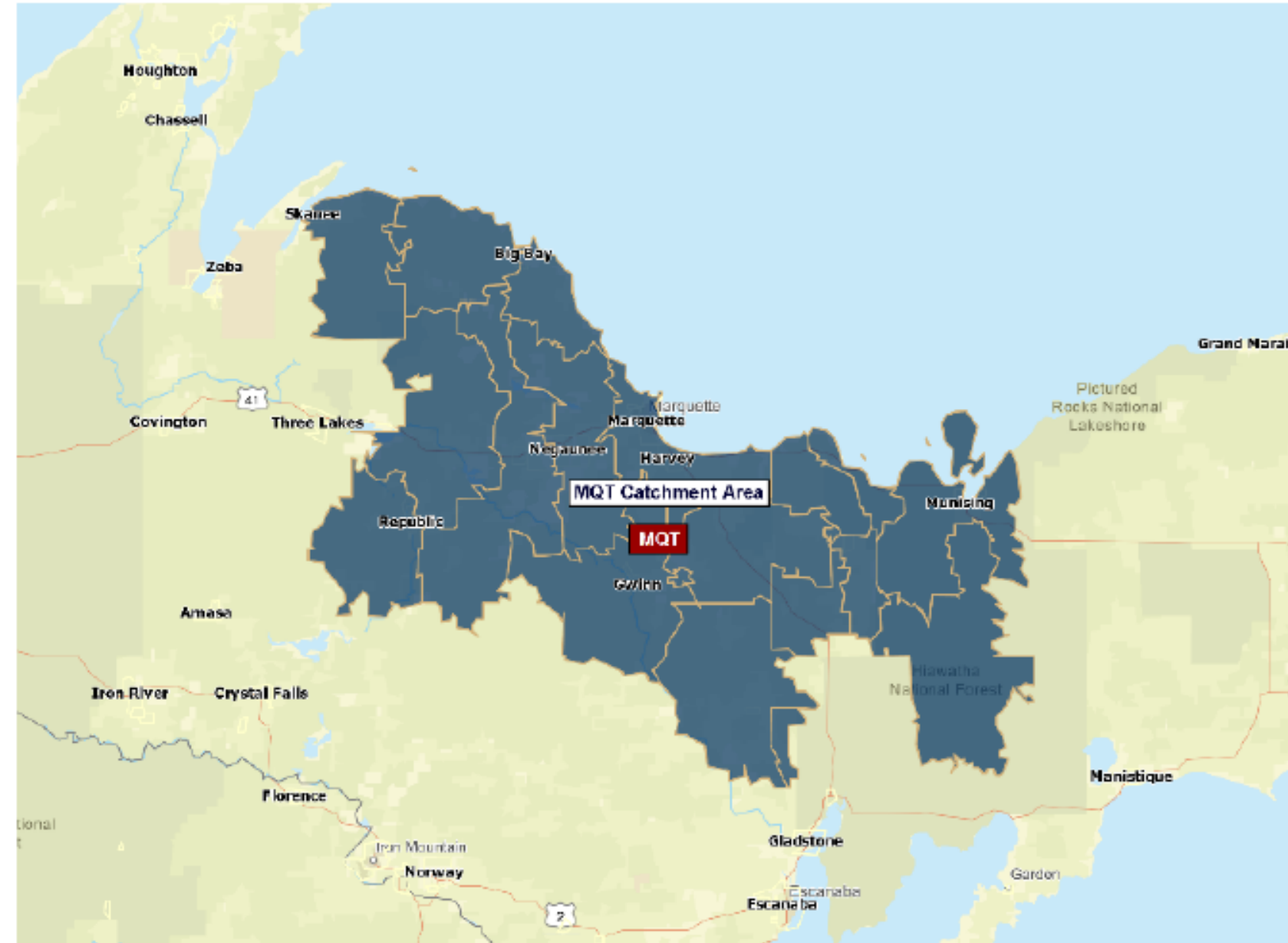
Demand and Leakage Study

AIRPORT CATCHMENT AREA

An airport catchment area, or service area, is a geographic area surrounding an airport where it can reasonably expect to draw passenger traffic and is representative of the local market. The catchment area contains the population of travelers who should use MQT considering the drive time from the catchment area to competing airports. This population of travelers is MQT's focus market for air service improvements and represents most travelers using the local airport.

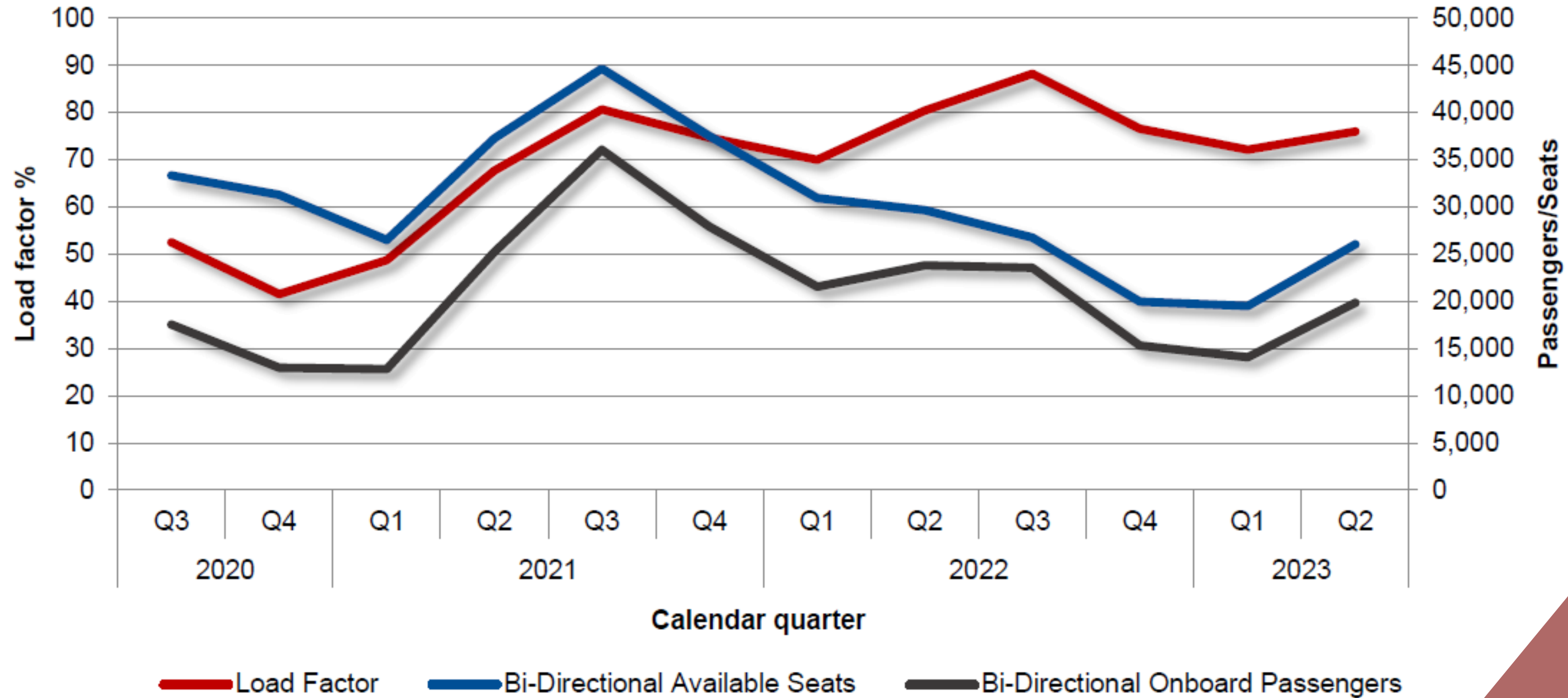
Exhibit 3.1 identifies the MQT catchment area. It is comprised of 21 zip codes within the U.S. with a population estimated at 76,012 in 2023¹.

EXHIBIT 3.1 MQT CATCHMENT AREA



Demand and Leakage Study

EXHIBIT 3.3 LOAD FACTOR, AVAILABLE SEATS AND ONBOARD PASSENGERS

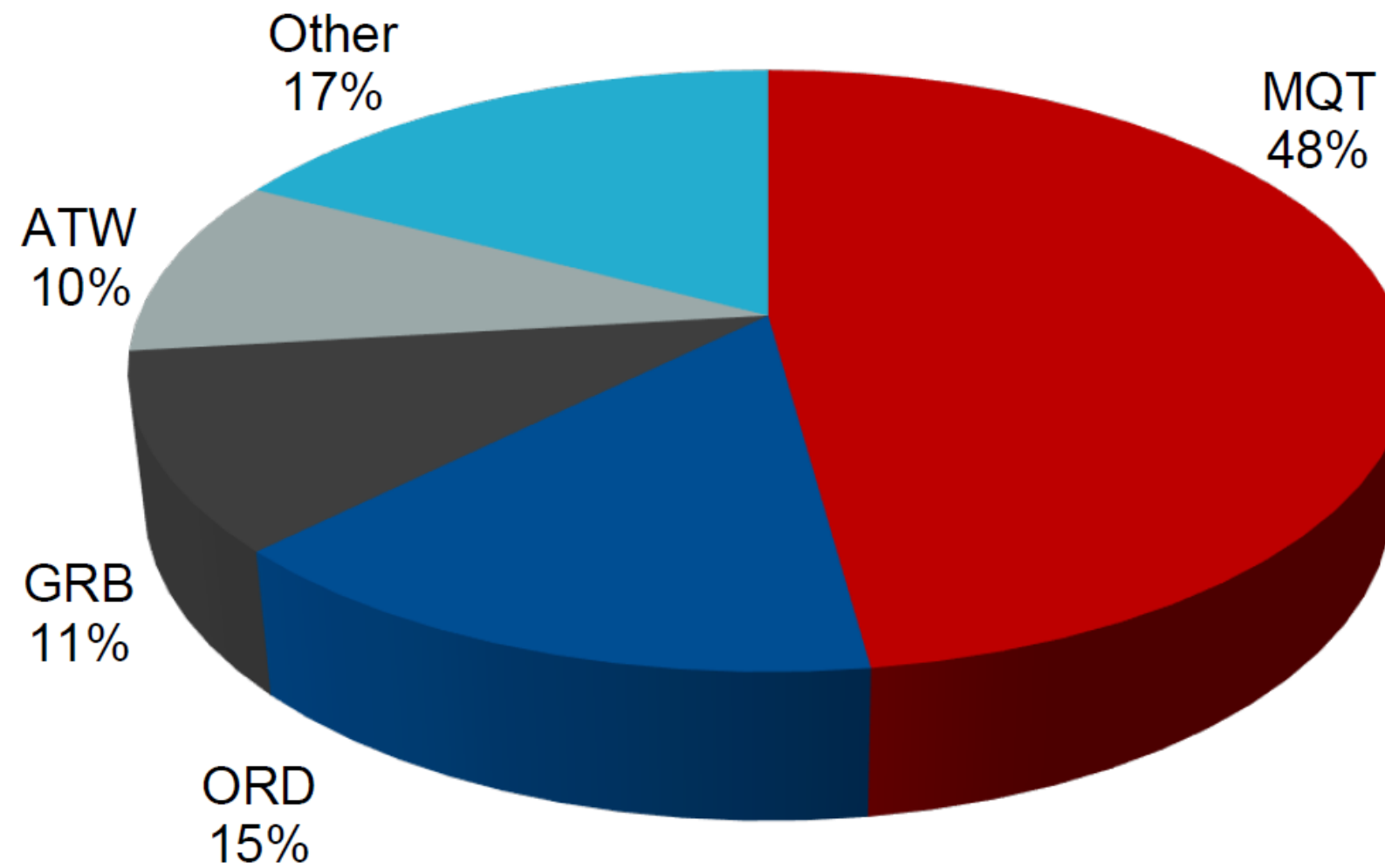


Demand and Leakage Study

TABLE 3.2 AIRPORT USE - DOMESTIC & INTERNATIONAL COMPARISON			
RANK	ORIGINATING AIRPORT	AIRPORT USE	
		PAX	%
Domestic			
1	MQT	68,822	50
2	ORD	15,215	11
3	ATW	14,410	10
4	GRB	14,210	10
5	Other	25,313	18
Subtotal		137,972	100
International			
1	ORD	7,205	47
2	MQT	4,481	30
3	GRB	2,030	13
4	ATW	394	3
5	Other	1,060	7
Subtotal		15,171	100
Domestic and International			
1	MQT	73,303	48
2	ORD	22,420	15
3	GRB	16,241	11
4	ATW	14,805	10
5	Other	26,374	17
Total		153,143	100

Note: Percentages may not sum to 100 due to rounding.

EXHIBIT 3.4 AIRPORT USE

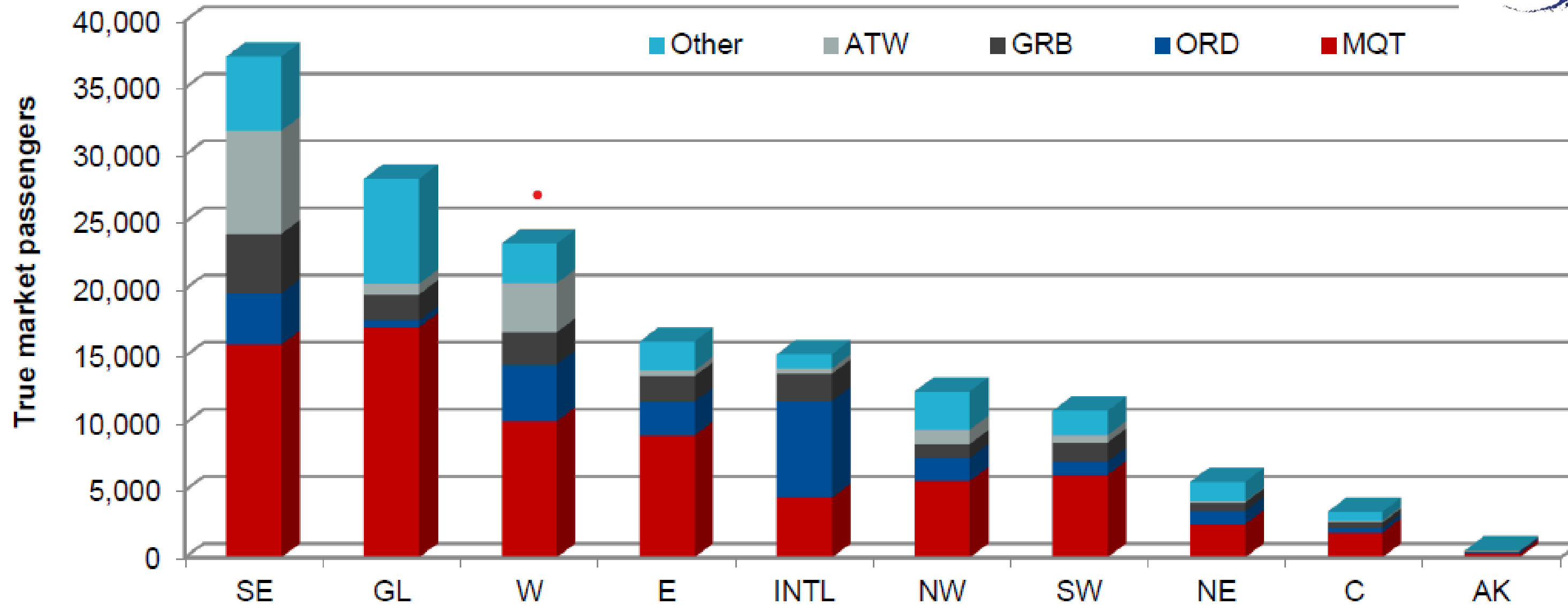


Demand and Leakage Study

EXHIBIT 4.1 FAA GEOGRAPHIC REGIONS



EXHIBIT 4.2 REGIONAL DISTRIBUTION OF TRAVEL



Demand and Leakage Study

TABLE 6.4 RETENTION RATE SENSITIVITY

RANK	DESTINATION	REPORTED PAX	RETENTION %	RETENTION IMPROVEMENT		
				5%	10%	15%
1	Detroit, MI	10,435	64	11,249	12,064	12,879
2	Fort Lauderdale, FL	753	15	999	1,245	1,490
3	Phoenix, AZ (PHX)	2,210	46	2,452	2,693	2,934
4	Chicago, IL (ORD)	3,813	85	4,036	4,259	4,466
5	Orlando, FL (MCO)	1,995	46	2,212	2,429	2,646
6	Denver, CO	1,884	45	2,091	2,299	2,507
7	Los Angeles, CA	1,706	41	1,912	2,118	2,323
8	San Francisco, CA	1,405	38	1,588	1,771	1,954
9	Boston, MA	1,349	38	1,527	1,706	1,884
10	Las Vegas, NV	1,413	41	1,588	1,762	1,936
11	Charlotte-Douglas, NC	1,729	56	1,885	2,040	2,196
12	Dallas, TX (DFW)	1,981	66	2,131	2,282	2,432
13	Nashville, TN	1,157	40	1,303	1,449	1,595
14	Washington, DC (DCA)	1,716	60	1,859	2,002	2,145
15	Tampa, FL	1,648	60	1,785	1,923	2,061
16	Seattle, WA	1,042	43	1,162	1,283	1,403
17	New York, NY (LGA)	1,402	59	1,520	1,638	1,756
18	Minneapolis, MN	0	0	112	223	335
19	Austin, TX	919	42	1,027	1,135	1,244
20	Cancun, Mexico	239	11	344	448	553
21	Atlanta, GA	1,351	66	1,453	1,555	1,658
22	Philadelphia, PA	1,109	56	1,209	1,309	1,409
23	Portland, OR	698	37	792	886	980
24	Salt Lake City, UT	942	50	1,036	1,130	1,223
25	Raleigh/Durham, NC	1,017	55	1,109	1,201	1,293
Total Top 25		43,913	49	48,382	52,851	57,304
Total Domestic		68,822	50	75,721	82,619	89,518
Total International		4,481	30	5,240	5,998	6,757
Total of All Markets		73,303	48	80,960	88,617	96,275

Retention

Retention is impacted by airfares, nonstop service, and quality of service.

If we increased retention by just 5%, we'd add more than 7,000 new passengers.

10% would add more than 15,000 new passengers.

This is why working in parallel to convince airlines to add more routes AND increasing the overall experience at Marquette Sawyer Regional Airport is essential.

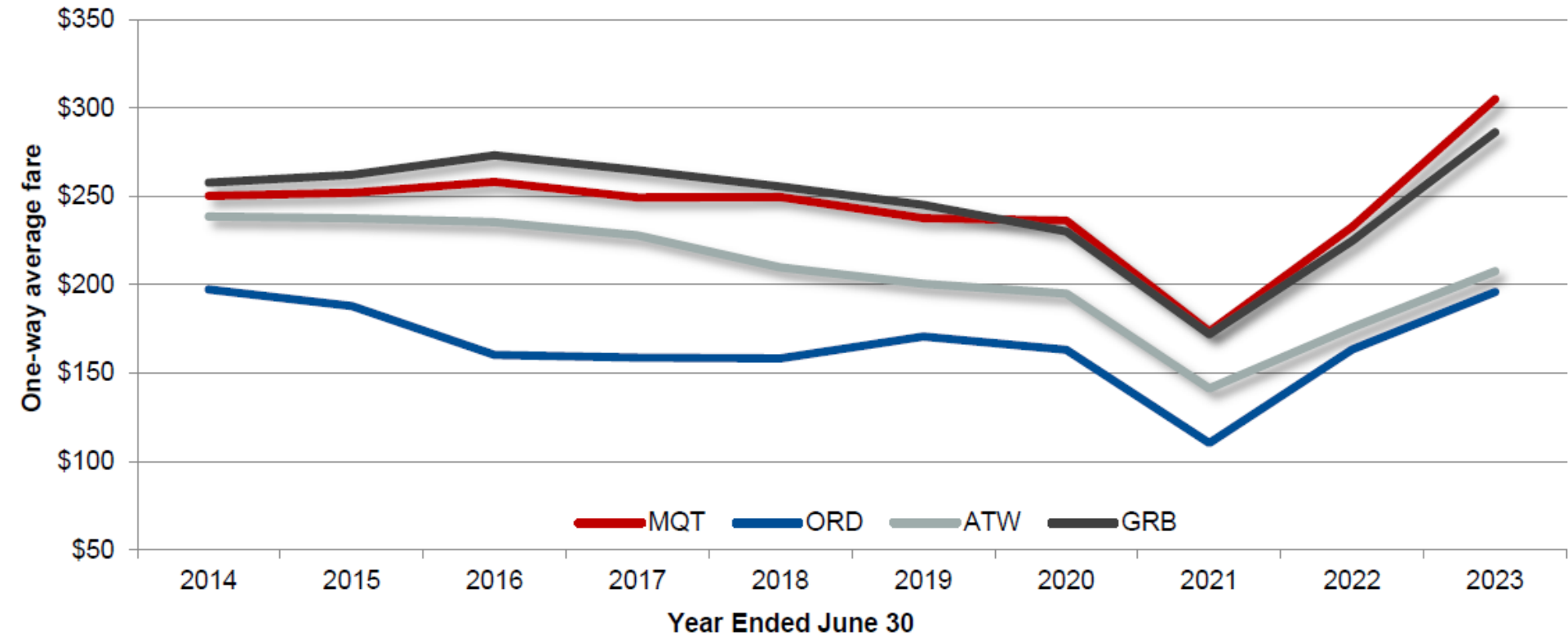


Demand and Leakage Study

TABLE 6.1 U.S. DOT AVERAGE DOMESTIC ONE-WAY FARES

RANK	DESTINATION	AVERAGE ONE-WAY FARE			
		MQT	ORD	ATW	GRB
1	Detroit, MI	\$178	\$165	\$227	\$238
2	Fort Lauderdale, FL	\$310	\$172	\$111	\$326
3	Phoenix, AZ (PHX)	\$328	\$213	\$342	\$249
4	Chicago, IL (ORD)	\$212	-	\$156	\$194
5	Orlando, FL (MCO)	\$314	\$147	\$259	\$165
6	Denver, CO	\$348	\$162	\$135	\$136
7	Los Angeles, CA	\$330	\$221	\$359	\$380
8	San Francisco, CA	\$423	\$287	\$364	\$379
9	Boston, MA	\$294	\$160	\$278	\$298
10	Las Vegas, NV	\$287	\$185	\$162	\$246
11	Charlotte-Douglas, NC	\$252	\$197	\$243	\$308
12	Dallas, TX (DFW)	\$330	\$191	\$313	\$319
13	Nashville, TN	\$299	\$149	\$85	\$274
14	Washington, DC (DCA)	\$298	\$167	\$247	\$265
15	Tampa, FL	\$322	\$160	\$253	\$266
16	Seattle, WA	\$392	\$217	\$347	\$382
17	New York, NY (LGA)	\$302	\$157	\$254	\$290
18	Minneapolis, MN	-	\$158	\$200	\$215
19	Austin, TX	\$307	\$186	\$260	\$268
20	Atlanta, GA	\$292	\$142	\$270	\$292
21	Philadelphia, PA	\$346	\$183	\$298	\$345
22	Portland, OR	\$419	\$262	\$306	\$400
23	Salt Lake City, UT	\$451	\$260	\$339	\$363
24	Raleigh/Durham, NC	\$314	\$183	\$276	\$288
25	San Diego, CA	\$391	\$262	\$338	\$303
Average Domestic Fare		\$305	\$196	\$208	\$286
Difference		-	\$109	\$97	\$19

EXHIBIT 6.2 10-YEAR AVERAGE DOMESTIC ONE-WAY FARE TREND



Airfare

Airfare out of MQT averaged \$305 for the top 25 domestic routes. This was \$109 higher than ORD, \$97 higher than ATW, and \$19 higher than GRB.

Average airfares are a result of many factors including length of haul, availability of seats, business versus leisure fares, and airline competition.



Demand and Leakage Study

TABLE 5.1 VISITATION BY MSA - BEYOND 50 MILES

RANK	MSA	CALENDAR YEAR			% CHANGE 2023	
		2023	2022	2019	VS. 2022	VS. 2019
1	Detroit-Warren-Dearborn, MI	133,200	134,388	102,589	(1%)	30%
2	Grand Rapids-Wyoming, MI	67,939	69,179	59,712	(2%)	14%
3	Chicago-Naperville-Elgin, IL-IN-WI	58,000	56,616	47,870	2%	21%
4	Lansing-East Lansing, MI	38,078	40,746	30,993	(7%)	23%
5	Minneapolis-St. Paul-Bloomington, MN-WI	33,907	32,514	27,762	4%	22%
6	Green Bay, WI	32,044	32,219	31,922	(1%)	0%
7	Milwaukee-Waukesha-West Allis, WI	25,724	23,350	19,176	10%	34%
8	Madison, WI	15,088	14,613	11,308	3%	33%
9	Appleton, WI	13,759	15,345	15,652	(10%)	(12%)
10	Duluth, MN-WI	13,743	14,964	12,536	(8%)	10%
11	Phoenix-Mesa-Scottsdale, AZ	4,788	5,378	3,546	(11%)	35%
12	New York-Newark-Jersey City, NY-NJ-PA	4,739	3,701	2,713	28%	75%
13	Cleveland-Elyria, OH	4,352	4,117	3,308	6%	32%
14	St. Louis, MO-IL	3,858	4,131	2,061	(7%)	87%
15	Washington-Arlington-Alexandria, DC-VA-MD-WV	3,799	4,031	3,063	(6%)	24%
16	Toledo, OH	3,651	1,984	1,776	84%	106%
17	Tampa-St. Petersburg-Clearwater, FL	3,599	3,843	1,611	(6%)	123%
18	Indianapolis-Carmel-Anderson, IN	3,247	2,547	3,452	27%	(6%)
19	Columbus, OH	3,208	3,509	2,030	(9%)	58%
20	Cincinnati, OH-KY-IN	3,157	2,842	2,597	11%	22%

Note: Ranking excludes smaller Michigan and Wisconsin communities



Demand and Leakage Study

AGGREGATED VISITATION

Five destinations were identified for analysis. The destinations were selected based on the top opportunities identified for nonstop air service by considering geography and the importance of the destinations to the airport and the community. The destinations were Chicago, Illinois; Dallas, Texas; Denver, Colorado; Minneapolis, Minnesota; and Orlando, Florida (**Exhibit 6.2**).

Table 6.2 summarizes the estimated number of visits for calendar year 2022 compared to calendar year 2021 and 2019 from the Marquette area to the selected markets. Chicago had the highest visitation of the five selected markets, with visitation double that of the next largest market. Since 2019, visitation was down in all markets except Dallas that increased by 57 percent. Visitation to Chicago was down by the highest percentage at 42 percent.

EXHIBIT 6.2 SELECTED DESTINATION MARKETS



TABLE 6.2 VISITATION BY DESTINATION

DESTINATION	VISITATION			% CHG 2022 VS.	
	2022	2021	2019	2021	2019
Chicago, IL	28,879	46,233	49,704	(38%)	(42%)
Minneapolis, MN	14,371	11,412	17,780	26%	(19%)
Orlando, FL	5,217	4,730	7,388	10%	(29%)
Denver, CO	2,845	4,861	4,244	(41%)	(33%)
Dallas, TX	2,178	2,200	1,383	(1%)	57%



Demand and Leakage Study

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Orlando, FL	5,217	4,730	7,388	10%	(29%)	
Denver, CO	2,845	4,861	4,244	(41%)	(33%)	
Dallas, TX	2,178	2,200	1,383	(1%)	57%	

TABLE 6.5 VISITATION BY MONTH - MINNEAPOLIS, MN

MONTH	2023	2022	2021	2019	% CHG 2022 VS.	
					2021	2019
January	563	679	206	659	230%	3%
February	753	639	266	676	140%	(5%)
March	1,548	1,279	1,142	1,937	12%	(34%)
April	1,049	1,763	1,807	2,335	(2%)	(24%)
May	1,358	981	604	3,519	62%	(72%)
June	2,567	1,050	638	1,624	65%	(35%)
July	-	2,236	963	1,527	132%	46%
August	-	2,002	1,581	2,319	27%	(14%)
September	-	1,425	1,445	560	(1%)	154%
October	-	453	1,300	710	(65%)	(36%)
November	-	1,070	716	1,211	49%	(12%)
December	-	794	744	703	7%	13%
Total	7,838	14,371	11,412	17,780	26%	(19%)

TABLE 6.6 VISITATION AND AIR SERVICE COMPARISON - MINNEAPOLIS, MN

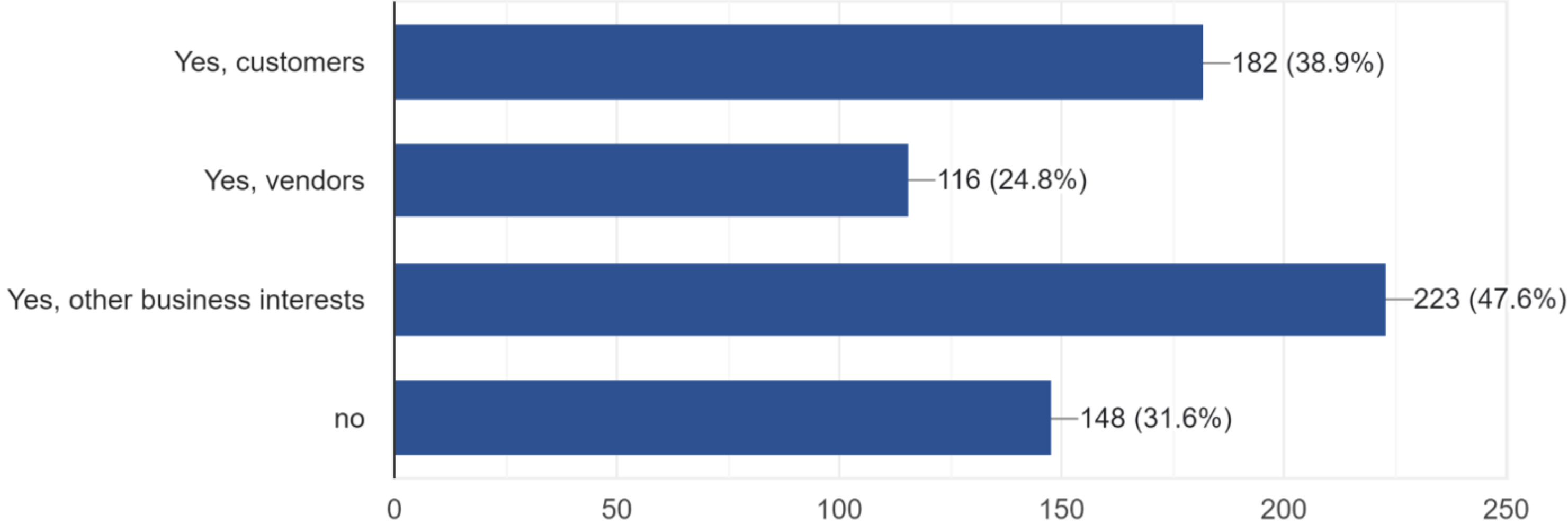
MARKET	2022 POPULATION	VISITATION				SEATS			
		2022	PER 1,000 POP.	2019	% CHG	2022	PER 1,000 POP.	2019	% CHG
Eau Claire, WI	173,102	314,883	1,819.1	305,368	3%	2,418	14.0	-	-
Grand Forks, ND	103,593	120,397	1,162.2	150,582	(20%)	77,172	745.0	104,054	(26%)
Wausau, WI	164,485	78,140	475.1	96,687	(19%)	35,850	218.0	46,650	(23%)
Marquette, MI	66,995	14,371	214.5	17,780	(19%)	450	6.7	18,250	(98%)
Traverse City, MI	153,319	5,773	37.7	4,984	16%	8,364	54.6	30,070	(72%)
Grand Island, NE	76,931	4,547	59.1	5,365	(15%)	-	-	-	-
Saginaw, MI	189,342	1,991	10.5	5,748	(65%)	-	-	14,500	-
Sault Ste. Marie, MI	37,560	463	12.3	3,121	(85%)	18,250	485.9	18,250	0%
Market Average	120,666	67,571	560.0	73,704	(8%)	-	-	-	-



Business Demand Survey

DOES YOUR BUSINESS CURRENTLY HAVE CUSTOMERS, VENDORS, OR OTHER BUSINESS INTERESTS IN MINNEAPOLIS, MN?
PLEASE SELECT ALL THAT APPLY.

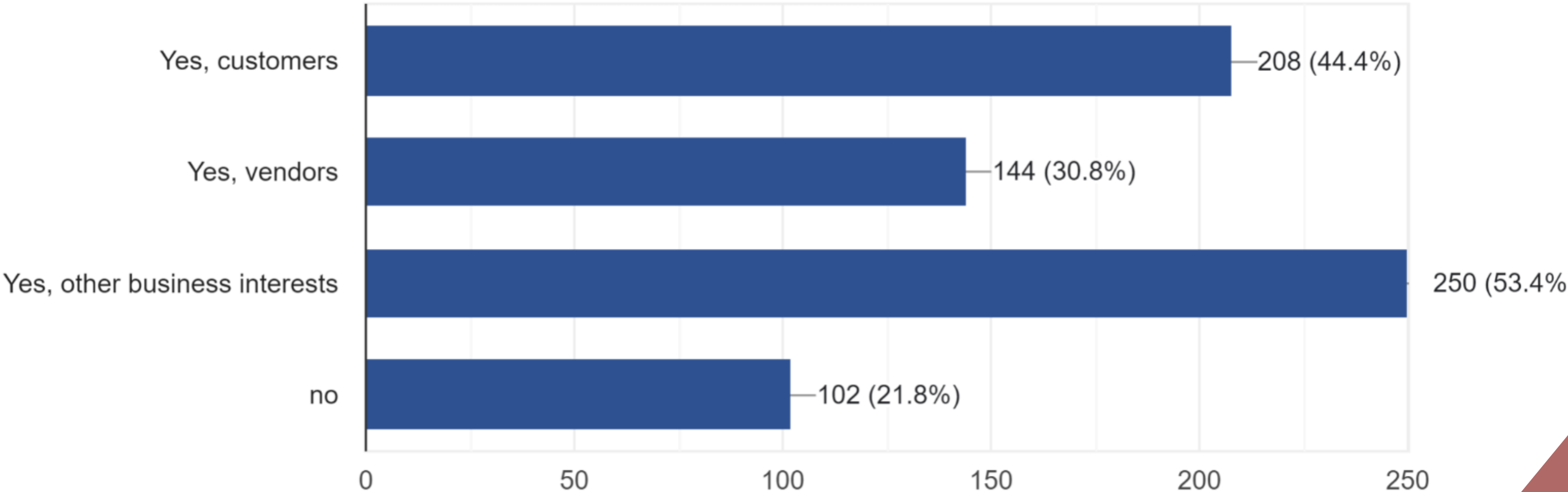
468 responses



Business Demand Survey

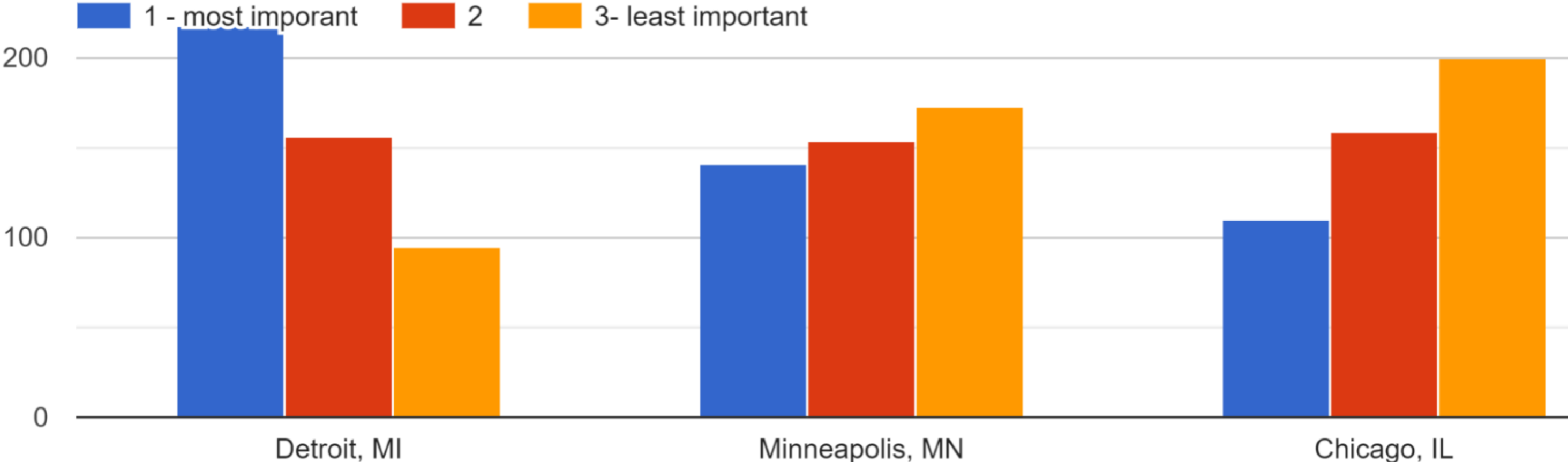
DOES YOUR BUSINESS CURRENTLY HAVE CUSTOMERS, VENDORS, OR OTHER BUSINESS INTERESTS IN DETROIT, MI?
PLEASE SELECT ALL THAT APPLY.

468 responses



Business Demand Survey

THE FOLLOWING THREE ARE THE MOST LIKELY ROUTES FOR ACHIEVING NEW OR EXPANDED SERVICES IN THE NEXT YEAR. PLEASE RANK THEM IN ORDER OF IMPORTANCE FOR MEETING YOUR BUSINESS NEEDS



Business Demand Survey

Top 3 Destinations By State

Alaska: Anchorage (2)
Alabama: Gulf Shores (1), Huntsville (2), Birmingham (1)
Arizona: Phoenix (26), State (21)
California: Burbank (2), Palm Springs (4), Sacramento (1), San Diego (13), San Francisco (16), State (31), San Jose (1), Los Angeles (19)
Colorado: Denver (58), State (15)
Connecticut: Hartford (2)
Florida: Ft Lauderdale (3), Jacksonville (4), Miami (14), Orlando (40), Pensacola (2), Sarasota (5), Tampa (25), West Palm Beach (2), Destin (2), Ft. Meyer (11), State (91)
Georgia: Atlanta (39), State (2)
Hawaii: (4)
Idaho: Boise (1)
Indiana: South Bend (1), Indianapolis (3)
Iowa: De Moines (1)
Illinois: Chicago (88), State (2)
Kentucky: Louisville (2), Lexington (1)
Louisiana: New Orleans (4)
Maine: Portland (1)
Maryland: Baltimore (7)
Massachusetts: Boston (20)
Michigan: Detroit (109), Grand Rapids (6), Lansing (14), Ann Arbor (2), Traverse City (5)
Minnesota: Minneapolis (87), State (2)
Missouri: Kansas City (3), St. Louis (7)
Montana: Bozeman (4), State (3), Kalispell (1), Helena (1)

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Business Demand Survey

Top 3 Destinations by Region

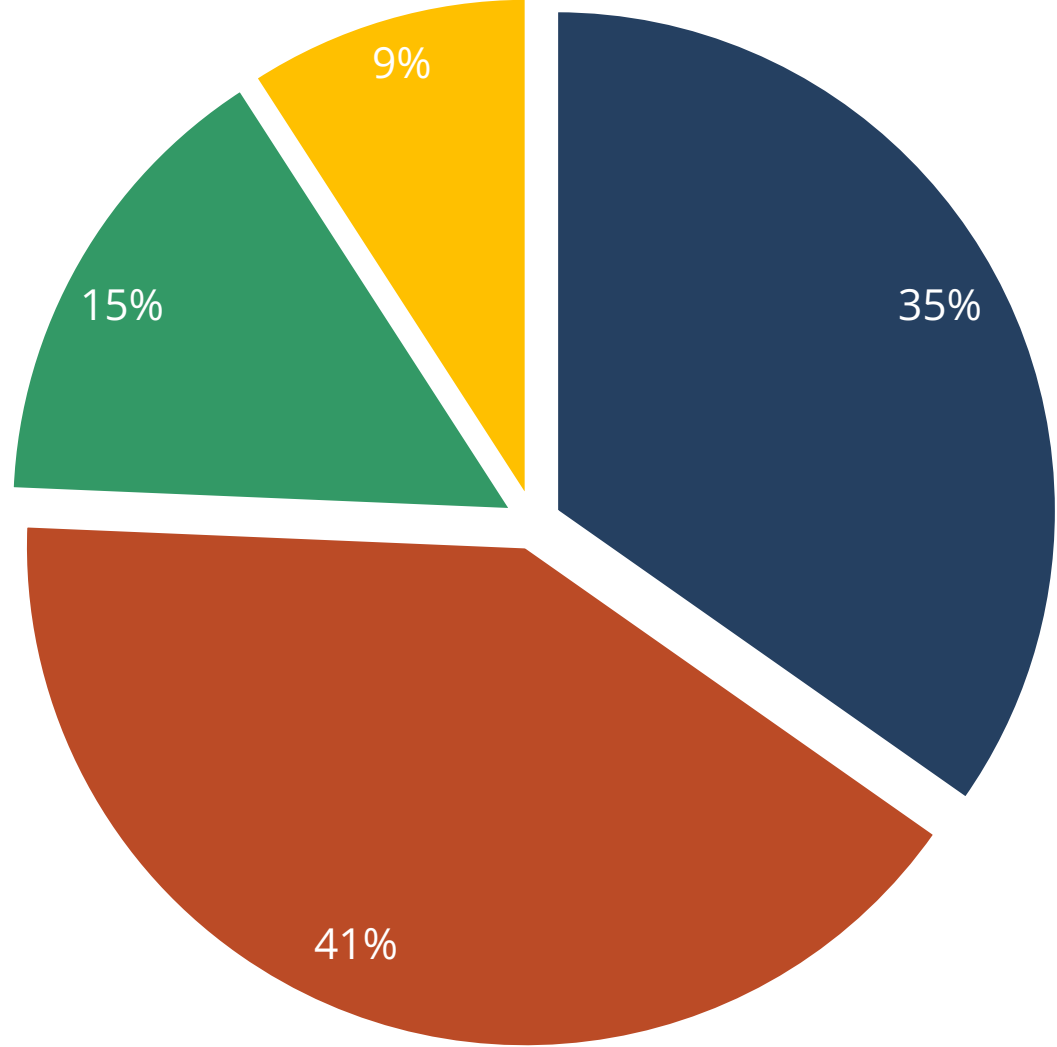
East Coast: Connecticut (2), Florida (199), Maine (1), Maryland (7), Massachusetts (20), Michigan (136), Minnesota (89), Missouri (10), Montana (9), Nebraska (2), New Hampshire (1), New Jersey (1), New York (58), North Carolina (17), Ohio (8), Pennsylvania (11), Rhode Island (1), South Carolina (2), Tennessee (22), Virginia (27)

Midwest: Colorado (73), Indiana (4), Iowa (1), Illinois (90), North Dakota (1), South Dakota (1), Utah (19), Wisconsin (9)

West Coast: Alaska (2), Arizona (47), California (87), Hawaii (4), Idaho (1), Nevada (34), New Mexico (8), Oregon (18), Washington (20)

South: Alabama (4), Georgia (41), Kentucky (3), Louisiana (4), Oklahoma (3), Texas (44)c

■ East Coast ■ Midwest ■ West Coast ■ South



Business Demand Survey

Top 3 Destinations by Country

Africa: Tanzania (1), South Africa (1)
Aruba: (3)
Caribbean: (4) Punta Gorda (1), Jamaica (2)
Canada: Toronto (1), Ontario (4), Vancouver (1)
Central America: (3), Costa Rica (1)
Costa Rica: (1)
Dominican Republic: Punta Cana (1), Porta Rico (2)
Germany: (1), Berlin (1), Frankfurt (1)
Italy: (1), Tuscan (1)
Mexico: (8), Cancun (5)
South America: (2)
United Kingdom: (1), Paris (1), London (3), France (1), Europe (10)
Netherlands: Amsterdam (2), Aruba (3)
Belgium: Brussels (1)
Nepal: Kathmandu (1)
Saudi Arabia: Doha (1)



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