

An aerial photograph showing a large body of water, likely a lake or bay, surrounded by dense green and yellowish-green forested hills. The sky is a clear, bright blue. In the distance, some buildings and a coastline are visible across the water.

# MARQUETTE SAWYER REGIONAL AIRPORT

**True Visitation Estimate**

CALENDAR YEAR 2023

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# INTRODUCTION & METHODOLOGY

## INTRODUCTION

The *True Visitation Estimate* is a location-based demand analysis, using the strength of the destination's overall visitation as the foundation for identifying air service development opportunities. The *True Visitation Estimate* differs from traditional retention/diversion studies in that it uses location-based cell phone Global Positioning System (GPS) data. The *True Visitation Estimate* does not use airline data but uses GPS data to track movements and unique data points, providing a level of detail unparalleled in the aviation industry.



The *True Visitation Estimate* identifies visitor travel patterns and estimates the number of people coming to and from the destination. The findings can be used by the Marquette Sawyer Regional Airport (MQT) and its community partners for ongoing air service development efforts and to amplify its advertising and business development strategies. The findings can also assist MQT and its community partners in developing a data-driven unified air service development strategy.

## METHODOLOGY

The *True Visitation Estimate* uses GPS data collected from mobile devices. This location-based data is aggregated from a variety of sources into a single contextualized dataset, with a high level of accuracy. Data for the *True Visitation Estimate* was acquired from a mobile data analytics company that collects data from a broad spectrum of mobile applications. Mobile data does not track devices 100 percent of the time. Locations are only given when the device is connected to data, whether it be cellular or Wi-Fi. The identity of the device owner is not available and never disclosed.

*To estimate inbound visitors to the Marquette area, the True Visitation Estimate reviews visitors from beyond 50 miles from the area to limit the impact of people traveling to the study area for day-to-day activities.*

The GPS data identifies the device’s “home” or “origin” location, where the device is most frequently observed in the evenings and on weekends over a duration of time. Inbound visitation data for the *True Visitation Estimate* was acquired for a specific geographic area around the Marquette metro area (**Exhibit 1.1**). The analysis assumes that all visitors to the Marquette area will at some point during their journey visit the study area. For the destination analysis portion of the report, the Marquette Micropolitan Statistical Area (Micro) was used to compare outbound visitation by destination to other similar Micros and Metropolitan Statistical Areas (MSAs). Inbound and outbound visitation include people traveling for business and/or leisure purposes.

#### EXHIBIT 1.1 GPS DATA STUDY AREA



Inbound visitation is reviewed for calendar year 2023 compared to calendar years 2019 and 2022. Outbound visitation, however, is not yet available for calendar year 2023, and, as such, the majority of the destination section focuses on 2022 compared to 2021 and 2019. Data for the first six months of 2023 is included, where available.

A significant portion of the Marquette area’s inbound visitation comes from locations within 50 miles of Marquette, a distance that visitors will most likely continue to drive versus fly to the area. Because of this, the *True Visitation Estimate* reviews visitors beyond 50 miles from the Marquette area.



# EXECUTIVE SUMMARY

## METHODOLOGY

GPS-based tracking data from smartphone devices was combined with data from other travel-related databases to create a true visitation estimate to quantify the visitation to and from the Marquette area. The true visitation estimate includes all travel by any form of transportation (e.g., car, bus, and aircraft). Inbound visitation compared calendar year 2023 to 2022 and 2019. Destination data is not yet available for the full calendar year 2023 and reviews 2022 versus 2021 and 2019. Schedule data was sourced from Diio Mi as of January 16, 2024.

## TRUE VISITATION ESTIMATE (INBOUND)

Visitation to the Marquette area was estimated at 1.27 million visits in 2023 from beyond 50 miles. Visitation increased 7 percent from 2019 and was up in eight months of the year. Visitation was up 2 percent over 2022, increasing in six months of the year. The Marquette area's visitation peaks in the summer months of July and August. July was the peak month for visitation in 2023 versus August as the peak month in 2019 and 2022. January was the lowest month for visitation in 2019, while March was the lowest in 2022, and November was the lowest in 2023.

## TRUE VISITATION BY REGION (INBOUND)

The Great Lakes region (beyond 50 miles from the Marquette area) was the largest region for visitation, with nearly 1.13 million visits in 2023. The Southeast region was the second largest region for visitation, with more than 39,000 visits in 2023. The East region was the third largest region, with nearly 22,000 visits, followed by the Northwest, Central, West, Southwest, Northeast, and Alaska regions. Since 2019, five regions had increased visitation, with the Central region increasing by the highest percentage. Since 2022, four regions had increased visitation.

## TRUE VISITATION BY MSA (INBOUND)

The Detroit-Warren-Dearborn MSA generated the most visits to the Marquette area in 2023 from visitors more than 50 miles distant, with more than 133,000 visits. Visitation from the Detroit MSA was up 30 percent since 2019. The Grand Rapids-Wyoming MSA was the second largest, with nearly 68,000 visits in 2023, up 14 percent from 2019. The remaining top five MSAs included the Chicago-Naperville-Elgin, Lansing-East Lansing, and Minneapolis-St. Paul-Bloomington MSAs. Of the top five MSAs, Detroit and Chicago had nonstop service from MQT.

## DESTINATION ANALYSIS (OUTBOUND)

Outbound visitation from the Marquette Micro was reviewed to five destination markets. The selections, listed by highest visitation, included Chicago, IL; Minneapolis, MN; Orlando, FL; Denver, CO; and Dallas, TX. Outbound visitation increased to Dallas in 2022 versus 2019.

## CONCLUSIONS

The top air service development priority for MQT is supporting existing air service by Delta Air Lines to Detroit Metro Airport (DTW) and American Airlines to Chicago O'Hare International Airport (ORD). Visitation from the Detroit and Chicago metro areas increased since 2019; however, while visitation increased from Chicago since 2022, visitation dropped slightly from Detroit. Both airlines are scheduled to provide more capacity for the first six months of 2024 versus 2023.

The top new market opportunity is restoration of service to Minneapolis-St. Paul International Airport (MSP) by Delta. Minneapolis was the fifth largest inbound visitation metro area and improved compared to both 2019 and 2022. In addition, outbound visitation in 2022 compared well to several other markets with existing nonstop service.

# TRUE VISITATION ESTIMATE

This section provides the estimated visitation on an aggregated basis for the Marquette area. This section details the true visitation by year, month, and season.

## VISITATION BY MONTH/YEAR

**Table 3.1** summarizes the estimated number of visitors for calendar year 2023 compared to calendar years 2019 and 2022 for visitation from beyond 50 miles to the Marquette area. In 2023, the Marquette area had nearly 1.27 million annual visits. Visitation was up 7 percent compared to 2019, increasing in eight months



of the year. The largest percentage increases were in January and September at 15 percent or more. In the four months with decreased visitation, the decreases were 1 percent or less except for November that decreased 13 percent. Calendar year 2023 visitation increased versus 2022 visitation by 2 percent. Visitation increased in six of the 12 months, with the largest percentage increases in June and July. The highest percentage decrease was in October at 11 percent.

**TABLE 3.1 VISITATION BY MONTH/YEAR - BEYOND 50 MILES**

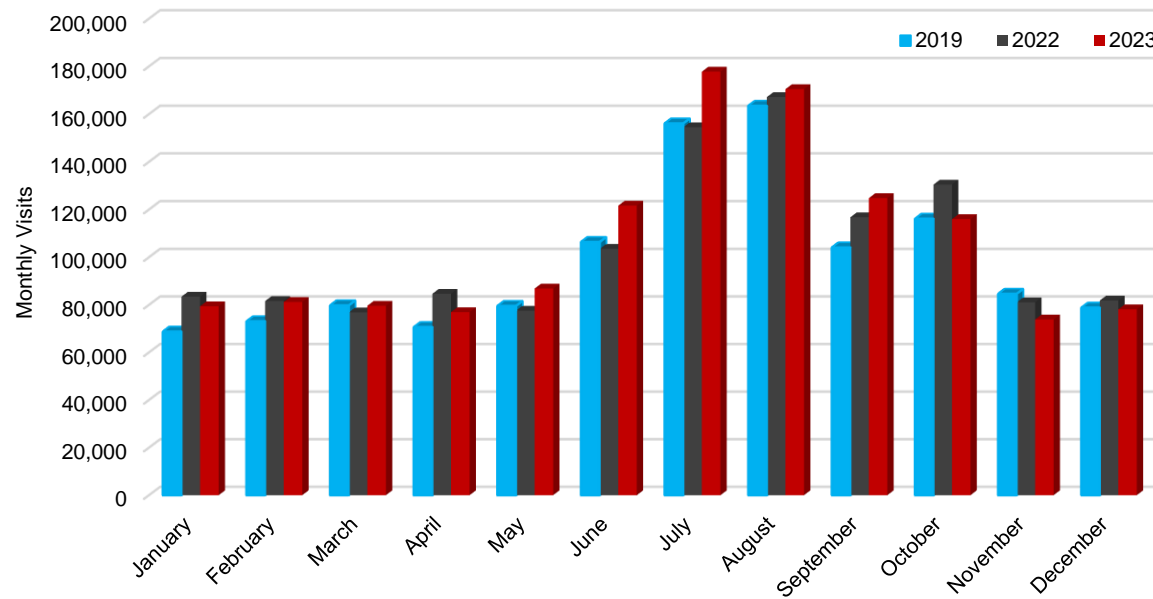
MONTH	CALENDAR YEAR			% CHANGE 2023	
	2023	2022	2019	VS. 2022	VS. 2019
January	79,390	83,428	68,742	(5%)	15%
February	81,196	81,603	73,068	(0%)	11%
March	79,586	76,821	79,782	4%	(0%)
April	76,933	84,634	70,621	(9%)	9%
May	86,854	77,530	79,524	12%	9%
June	121,633	103,520	106,398	17%	14%
July	177,796	154,475	156,070	15%	14%
August	170,463	167,145	163,447	2%	4%
September	124,796	116,765	104,088	7%	20%
October	115,997	130,458	116,130	(11%)	(0%)
November	73,829	81,058	84,612	(9%)	(13%)
December	78,123	81,817	78,793	(5%)	(1%)
<b>Total</b>	<b>1,266,596</b>	<b>1,239,254</b>	<b>1,181,275</b>	<b>2%</b>	<b>7%</b>

*Marquette visitation has a summer peak, with July and August the peak months for visitation in the three years measured.*

### SEASONALITY

Exhibit 3.1 shows the seasonality for Marquette area visitors who reside more than 50 miles away. Marquette had a summer season peak in visitation, in 2019, 2022, and 2023, with visitation highest in July and August. The first five months of the year along with November and December had relatively steady levels of visitation in each of the years measured. August was the peak month in visitation in 2019 and 2022, while July was the peak month in 2023. January was the lowest month for visitation in 2019, while March was the lowest month in 2022, and November was the lowest month for visitation in 2023.

EXHIBIT 3.1 VISITS BY MONTH – BEYOND 50 MILES



# TRUE VISITATION BY REGION AND STATE

Visitation to the Marquette area varies greatly by region, with demand typically strongest from regions closer to the Marquette area since much of the visitation occurs via the automobile. **Table 4.1** shows the number of visits for calendar year 2023 compared to calendar years 2019 and 2022 by region for visitors beyond 50 miles.

**Exhibit 4.1** provides a depiction of the states that make up each region.

The Great Lakes region was the largest region, with nearly 1.13 million visits in 2023, representing 89 percent of the overall visitation to the Marquette area from beyond 50 miles, nearly the same proportion as 2019 and 2022. Great Lakes visitation was up 8 percent from 2019 and 3 percent since 2022. The Southeast region was the second largest in 2023, with more than 39,000 visits. Southeast region visitation was down 4 percent since 2019. The East region was the third largest region at nearly 22,000 visits in 2023 followed by the Northwest region, with nearly 19,000 visits. Compared to 2019, the Northwest region decreased by the highest percentage at 24 percent. The Central region increased by the highest percentage. Compared to 2022, the Central region increased by the highest percentage, while Alaska decreased by the highest percentage.

**EXHIBIT 4.1 GEOGRAPHIC REGIONS**



**TABLE 4.1 VISITATION BY REGION - BEYOND 50 MILES**

REGION	CALENDAR YEAR			% CHANGE 2023	
	2023	2022	2019	VS. 2022	VS. 2019
Great Lakes	1,128,398	1,097,030	1,042,625	3%	8%
Southeast	39,003	36,486	40,763	7%	(4%)
East	21,851	23,899	20,251	(9%)	8%
Northwest	18,963	18,447	24,925	3%	(24%)
Central	17,786	15,889	9,963	12%	79%
West	16,680	19,809	18,158	(16%)	(8%)
Southwest	15,538	15,835	16,972	(2%)	(8%)
Northeast	6,108	8,038	5,984	(24%)	2%
Alaska	2,269	3,821	1,634	(41%)	39%
<b>Total</b>	<b>1,266,596</b>	<b>1,239,254</b>	<b>1,181,275</b>	<b>2%</b>	<b>7%</b>



Visitation from the Great Lakes region was up 8 percent versus 2019 and 3 percent versus 2022, with Michigan the largest state for visitation.

### GREAT LAKES REGION

The Marquette area had nearly 1.13 million visits in 2023 from the Great Lakes region. **Exhibit 4.2** provides a heat map and visitation by state. **Table 4.2** provides visitation by state and the top MSAs for the Great Lakes region. Visitation from the Great Lakes region increased 8 percent since 2019 and 3 percent since 2022.

Michigan had the most visitation from the Great Lakes region with 68 percent of the visits and up 5 percent compared to 2019. The largest MSA for visitation from Michigan was Detroit, with visitation up 30 percent since 2019. Wisconsin had the second-most visits, with more than 191,000 visits in 2023, an increase of 11 percent versus 2019. Illinois was the third largest state, generating more than 64,000 visits in 2023 and increasing 23 percent since 2019. Every state in the Great Lakes region had increased visitation since 2019 except South Dakota. Compared to 2022, every state except North Dakota and South Dakota had increased visitation.

EXHIBIT 4.2 GREAT LAKES REGION HEAT MAP BY STATE

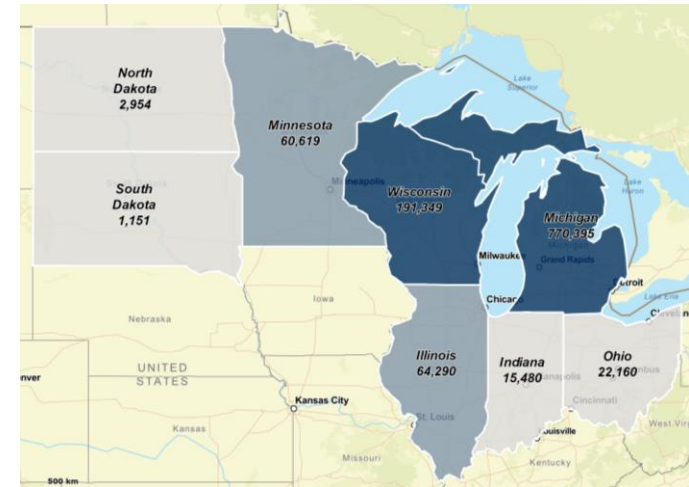
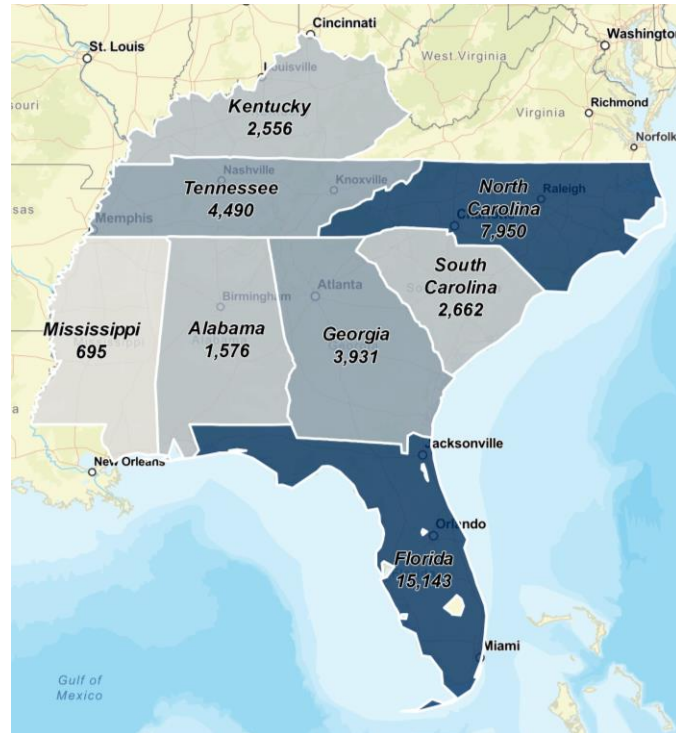


TABLE 4.2 GREAT LAKES REGION VISITATION - BEYOND 50 MILES

STATE/MSA	CALENDAR YEAR			% CHANGE 2022	
	2023	2022	2019	VS. 2021	VS. 2019
<b>Michigan</b>	<b>770,395</b>	<b>751,093</b>	<b>731,520</b>	<b>3%</b>	<b>5%</b>
Detroit-Warren-Dearborn, MI	133,200	134,388	102,589	(1%)	30%
Grand Rapids-Wyoming, MI	67,939	69,179	59,712	(2%)	14%
<b>Wisconsin</b>	<b>191,349</b>	<b>186,570</b>	<b>172,972</b>	<b>3%</b>	<b>11%</b>
Green Bay, WI	32,044	32,219	31,922	(1%)	0%
Milwaukee-Waukesha-West Allis, WI	25,724	23,350	19,176	10%	34%
<b>Illinois</b>	<b>64,290</b>	<b>62,279</b>	<b>52,274</b>	<b>3%</b>	<b>23%</b>
Chicago-Naperville-Elgin, IL-IN-WI	51,446	50,294	43,103	2%	19%
<b>Minnesota</b>	<b>60,619</b>	<b>56,934</b>	<b>49,340</b>	<b>6%</b>	<b>23%</b>
Minneapolis-St. Paul-Bloomington, MN-WI	30,891	30,353	26,290	2%	18%
<b>Ohio</b>	<b>22,160</b>	<b>19,836</b>	<b>18,099</b>	<b>12%</b>	<b>22%</b>
Cleveland-Elyria, OH	4,352	4,117	3,308	6%	32%
<b>Indiana</b>	<b>15,480</b>	<b>15,441</b>	<b>14,297</b>	<b>0%</b>	<b>8%</b>
Chicago-Naperville-Elgin, IL-IN-WI	3,519	3,096	2,340	14%	50%
Indianapolis-Carmel-Anderson, IN	3,247	2,547	3,452	27%	(6%)
<b>North Dakota</b>	<b>2,954</b>	<b>3,634</b>	<b>2,753</b>	<b>(19%)</b>	<b>7%</b>
<b>South Dakota</b>	<b>1,151</b>	<b>1,243</b>	<b>1,370</b>	<b>(7%)</b>	<b>(16%)</b>
<b>Great Lakes Region</b>	<b>1,128,398</b>	<b>1,097,030</b>	<b>1,042,625</b>	<b>3%</b>	<b>8%</b>

EXHIBIT 4.3 SOUTHEAST REGION HEAT MAP BY STATE



## SOUTHEAST REGION

The Marquette area had more than 39,000 visits in 2023 from the Southeast region. **Exhibit 4.3** provides a heat map and visitation by state. **Table 4.3** provides visitation by state and the top MSAs for the Southeast region. Visitation from the Southeast region decreased 4 percent since 2019 but increased 7 percent since 2022.

Florida had the most visits from the Southeast region, with more than 15,000 visits in 2023. The Tampa-St. Petersburg-Clearwater MSA accounted for 24 percent of the Florida visitation and more than doubled since 2019. North Carolina had the second highest visitation by state from the region, followed by Tennessee. North Carolina’s visitation declined 2 percent since 2019, while Tennessee’s decreased 24 percent. Five of the eight states had decreased visitation since 2019, while only two states had decreased visitation since 2022.

TABLE 4.3 SOUTHEAST REGION VISITATION

STATE/MSA	CALENDAR YEAR			% CHANGE 2023	
	2023	2022	2019	VS. 2022	VS. 2019
<b>Florida</b>	<b>15,143</b>	<b>14,228</b>	<b>15,880</b>	<b>6%</b>	<b>(5%)</b>
Tampa-St. Petersburg-Clearwater, FL	3,599	3,843	1,611	(6%)	123%
Miami-Fort Lauderdale-West Palm Beach, FL	1,658	1,281	1,363	29%	22%
Orlando-Kissimmee-Sanford, FL	1,427	890	1,298	60%	10%
<b>North Carolina</b>	<b>7,950</b>	<b>6,584</b>	<b>8,110</b>	<b>21%</b>	<b>(2%)</b>
Raleigh, NC	2,058	1,758	1,979	17%	4%
Charlotte-Concord-Gastonia, NC-SC	1,919	1,682	744	14%	158%
<b>Tennessee</b>	<b>4,490</b>	<b>3,968</b>	<b>5,872</b>	<b>13%</b>	<b>(24%)</b>
Nashville-Davidson--Murfreesboro--Franklin, TN	1,778	1,695	1,849	5%	(4%)
<b>Georgia</b>	<b>3,931</b>	<b>4,979</b>	<b>4,604</b>	<b>(21%)</b>	<b>(15%)</b>
Atlanta-Sandy Springs-Roswell, GA	2,035	3,578	2,515	(43%)	(19%)
<b>South Carolina</b>	<b>2,662</b>	<b>2,215</b>	<b>1,681</b>	<b>20%</b>	<b>58%</b>
<b>Kentucky</b>	<b>2,556</b>	<b>2,373</b>	<b>2,245</b>	<b>8%</b>	<b>14%</b>
<b>Alabama</b>	<b>1,576</b>	<b>1,320</b>	<b>1,228</b>	<b>19%</b>	<b>28%</b>
<b>Mississippi</b>	<b>695</b>	<b>819</b>	<b>1,143</b>	<b>(15%)</b>	<b>(39%)</b>
<b>Southeast Region</b>	<b>39,003</b>	<b>36,486</b>	<b>40,763</b>	<b>7%</b>	<b>(4%)</b>

*The East region had nearly 22,000 visits in 2023 to the Marquette area, with Pennsylvania the largest state for visitation and up a significant 47 percent since 2019.*

### EAST REGION

The Marquette area had nearly 22,000 visits in 2023 from the East region. **Exhibit 4.4** provides a heat map and visitation by state for the East region. **Table 4.4** provides visitation by state and top MSAs for the East region. Visitation from the East region increased 8 percent since 2019 but decreased 9 percent since 2022.

Pennsylvania was the largest state in the region, with more than 6,300 visits in 2023. Visitation from Pennsylvania increased 47 percent since 2019. The Pittsburgh metro area made up 36 percent of visitation from Pennsylvania, up from 19 percent in 2019. New York had the second most visits from the East region, with more than 5,600 visits in 2023. Virginia had the third highest visitation. Maryland, New Jersey, West Virginia, Delaware, and the District of Columbia followed in order of visitation from the East region. Visitation increased in three of the eight states since 2019 but increased in five states versus 2022.

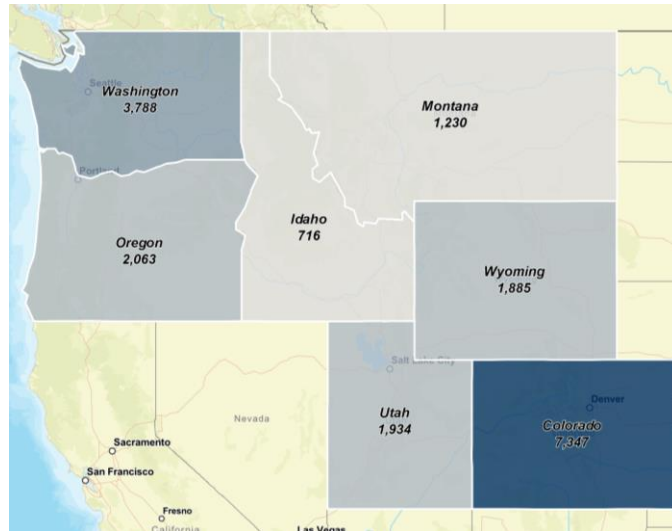
**EXHIBIT 4.4 EAST REGION HEAT MAP BY STATE**



**TABLE 4.4 EAST REGION VISITATION**

STATE/MSA	CALENDAR YEAR			% CHANGE 2023	
	2023	2022	2019	VS. 2022	VS. 2019
<b>Pennsylvania</b>	<b>6,334</b>	<b>6,321</b>	<b>4,306</b>	<b>0%</b>	<b>47%</b>
Pittsburgh, PA	2,298	1,840	837	25%	175%
<b>New York</b>	<b>5,627</b>	<b>5,498</b>	<b>6,094</b>	<b>2%</b>	<b>(8%)</b>
New York-Newark-Jersey City, NY-NJ-PA	3,607	2,979	2,045	21%	76%
<b>Virginia</b>	<b>5,232</b>	<b>7,562</b>	<b>4,656</b>	<b>(31%)</b>	<b>12%</b>
Washington-Arlington-Alexandria, DC-VA-MD-WV	3,246	3,339	1,756	(3%)	85%
<b>Maryland</b>	<b>1,961</b>	<b>2,119</b>	<b>2,549</b>	<b>(7%)</b>	<b>(23%)</b>
Baltimore-Columbia-Towson, MD	926	1,091	1,002	(15%)	(8%)
<b>New Jersey</b>	<b>1,344</b>	<b>1,207</b>	<b>978</b>	<b>11%</b>	<b>37%</b>
<b>West Virginia</b>	<b>748</b>	<b>888</b>	<b>914</b>	<b>(16%)</b>	<b>(18%)</b>
<b>Delaware</b>	<b>441</b>	<b>226</b>	<b>483</b>	<b>95%</b>	<b>(9%)</b>
<b>District of Columbia</b>	<b>164</b>	<b>78</b>	<b>271</b>	<b>110%</b>	<b>(39%)</b>
<b>East Region</b>	<b>21,851</b>	<b>23,899</b>	<b>20,251</b>	<b>(9%)</b>	<b>8%</b>

EXHIBIT 4.5 NORTHWEST REGION HEAT MAP BY STATE



## NORTHWEST REGION

The Marquette area had nearly 19,000 visits in 2023 from the Northwest region. **Exhibit 4.5** provides a heat map and visitation by state. **Table 4.5** provides visitation by state and the top MSAs for the Northwest region. The Northwest region visitation decreased by 24 percent since 2019 but increased 3 percent since 2022.

By state, Colorado had the highest visitation in the region, with more than 7,300 visits in 2023. Visitation from Colorado increased 20 percent since 2019. The largest MSA for visitation from Colorado was Denver, with 37 percent of the state's visitation and increased 6 percent compared to 2019. Washington was the second largest state, with nearly 3,800 visits in 2023 but decreased 27 percent since 2019. Only two of the seven states had increased visitation since 2019; however, four of the seven had increased visitation since 2022, with Wyoming visitation more than doubling.

TABLE 4.5 NORTHWEST REGION VISITATION

STATE/MSA	CALENDAR YEAR			% CHANGE 2023	
	2023	2022	2019	VS. 2022	VS. 2019
<b>Colorado</b>	<b>7,347</b>	<b>6,255</b>	<b>6,119</b>	<b>17%</b>	<b>20%</b>
Denver-Aurora-Lakewood, CO	2,698	3,061	2,554	(12%)	6%
<b>Washington</b>	<b>3,788</b>	<b>5,726</b>	<b>5,194</b>	<b>(34%)</b>	<b>(27%)</b>
Seattle-Tacoma-Bellevue, WA	2,248	4,172	3,277	(46%)	(31%)
<b>Oregon</b>	<b>2,063</b>	<b>1,394</b>	<b>1,531</b>	<b>48%</b>	<b>35%</b>
Portland-Vancouver-Hillsboro, OR-WA	1,216	1,021	442	19%	175%
<b>Utah</b>	<b>1,934</b>	<b>2,060</b>	<b>2,561</b>	<b>(6%)</b>	<b>(24%)</b>
Salt Lake City, UT	780	1,144	1,127	(32%)	(31%)
<b>Wyoming</b>	<b>1,885</b>	<b>907</b>	<b>2,416</b>	<b>108%</b>	<b>(22%)</b>
<b>Montana</b>	<b>1,230</b>	<b>1,422</b>	<b>6,149</b>	<b>(14%)</b>	<b>(80%)</b>
<b>Idaho</b>	<b>716</b>	<b>683</b>	<b>955</b>	<b>5%</b>	<b>(25%)</b>
<b>Northwest Region</b>	<b>18,963</b>	<b>18,447</b>	<b>24,925</b>	<b>3%</b>	<b>(24%)</b>

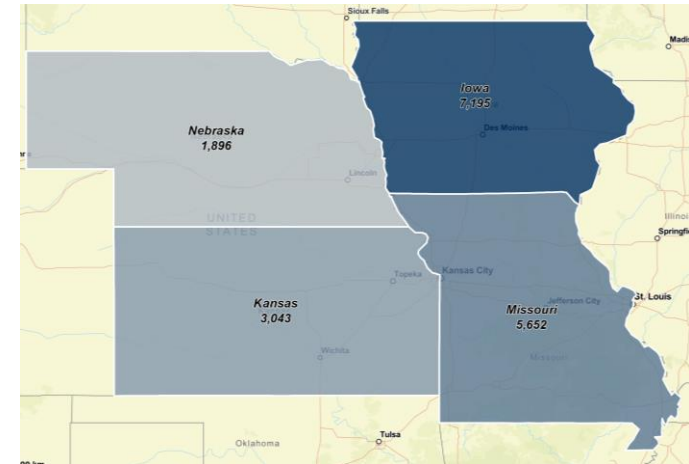
*The Central region had nearly 18,000 visits in 2023 to the Marquette area, with Iowa being the largest state at nearly 7,200 visits, up 55 percent since 2019 but down 4 percent since 2022.*

### CENTRAL REGION

The Marquette area had nearly 18,000 visits in 2023 from the Central region. **Exhibit 4.6** provides a heat map and visitation by state. **Table 4.6** provides visitation by state and the top MSAs for the Central region. Visitation in 2023 increased 79 percent since 2019 and 12 percent since 2022.

Iowa had the highest visitation from the Central region, with nearly 7,200 visits, an increase of 55 percent since 2019. Missouri had the second highest visitation with nearly 5,700 visits in 2023 and nearly doubled since 2019. The next largest state, Kansas, had more than 3,000 visits in 2023. Nebraska rounded out the Central region. Each state had increased visitation since 2019; however, one state had decreased visitation since 2022, Iowa.

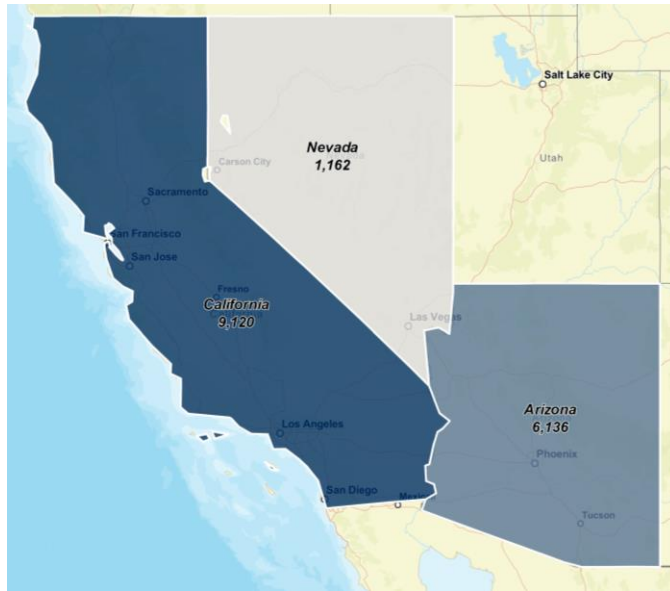
**EXHIBIT 4.6 CENTRAL REGION HEAT MAP BY STATE**



STATE/MSA	CALENDAR YEAR			% CHANGE 2023	
	2023	2022	2019	VS. 2022	VS. 2019
<b>Iowa</b>	<b>7,195</b>	<b>7,468</b>	<b>4,653</b>	<b>(4%)</b>	<b>55%</b>
Cedar Rapids, IA	1,267	690	442	84%	187%
<b>Missouri</b>	<b>5,652</b>	<b>4,684</b>	<b>2,866</b>	<b>21%</b>	<b>97%</b>
St. Louis, MO-IL	2,389	2,282	1,146	5%	108%
Kansas City, MO-KS	1,098	836	776	31%	41%
<b>Kansas</b>	<b>3,043</b>	<b>2,317</b>	<b>1,303</b>	<b>31%</b>	<b>134%</b>
Kansas City, MO-KS	1,151	779	402	48%	186%
<b>Nebraska</b>	<b>1,896</b>	<b>1,420</b>	<b>1,141</b>	<b>34%</b>	<b>66%</b>
Omaha-Council Bluffs, NE-IA	887	535	201	66%	341%
<b>Central Region</b>	<b>17,786</b>	<b>15,889</b>	<b>9,963</b>	<b>12%</b>	<b>79%</b>



EXHIBIT 4.7 WEST REGION HEAT MAP BY STATE



## WEST REGION

The Marquette area had nearly 17,000 visits in 2023 from the West region. **Exhibit 4.7** provides a heat map and visitation by state. **Table 4.7** provides visitation by state and the top MSAs for the West region. West region visitation decreased 8 percent since 2019 and 16 percent since 2022.

On a state basis, California had the most visits from the region, with more than 9,100 visits in 2023, a decrease of 1 percent since 2019. The Los Angeles and San Diego MSAs were the largest for visitation from California. Arizona was the second largest state, generating more than 6,100 visits in 2023, increasing 2 percent since 2019. Nevada and Hawaii rounded out the West region. Each state in the region had decreased visitation since 2019 except Arizona. Compared to 2022, every state had decreased visitation.

TABLE 4.7 WEST REGION VISITATION

STATE/MSA	CALENDAR YEAR			% CHANGE 2023	
	2023	2022	2019	VS. 2022	VS. 2019
<b>California</b>	<b>9,120</b>	<b>10,674</b>	<b>9,203</b>	<b>(15%)</b>	<b>(1%)</b>
Los Angeles-Long Beach-Anaheim, CA	1,599	2,811	2,352	(43%)	(32%)
San Diego-Carlsbad, CA	1,296	833	1,326	56%	(2%)
<b>Arizona</b>	<b>6,136</b>	<b>6,816</b>	<b>6,013</b>	<b>(10%)</b>	<b>2%</b>
Phoenix-Mesa-Scottsdale, AZ	4,788	5,378	3,546	(11%)	35%
<b>Nevada</b>	<b>1,162</b>	<b>1,909</b>	<b>1,718</b>	<b>(39%)</b>	<b>(32%)</b>
Las Vegas-Henderson-Paradise, NV	778	938	1,060	(17%)	(27%)
<b>Hawaii</b>	<b>262</b>	<b>410</b>	<b>1,224</b>	<b>(36%)</b>	<b>(79%)</b>
<b>West Region</b>	<b>16,680</b>	<b>19,809</b>	<b>18,158</b>	<b>(16%)</b>	<b>(8%)</b>

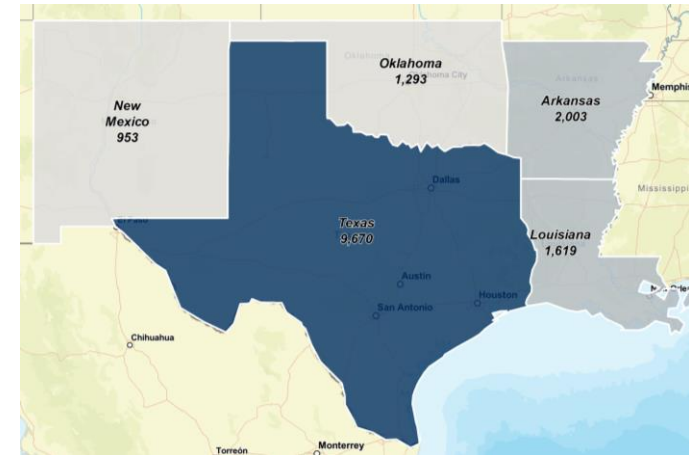
*The Southwest region had nearly 16,000 visits to the Marquette area in 2023, with Texas the largest state for visitation at nearly 9,700 visits.*

### SOUTHWEST REGION

The Marquette area had nearly 16,000 visits in 2023 from the Southwest region. **Exhibit 4.8** provides a heat map and visitation by state. **Table 4.8** provides visitation by state and the top MSAs for the Southwest region. Visits from the Southwest region decreased 8 percent compared to 2019 and 2 percent compared to 2022.

Texas had the highest visits from the Southwest region, with nearly 9,700 visits in 2023, decreasing 10 percent since 2019. Arkansas had the second highest visitation from the Southwest region, with slightly more than 2,000 visits and nearly doubled since 2019. Louisiana, Oklahoma, and New Mexico rounded out the Southwest region. All but Arkansas had decreased visitation since 2019, while three states, including Arkansas, Louisiana, and Oklahoma, had increased visitation since 2022.

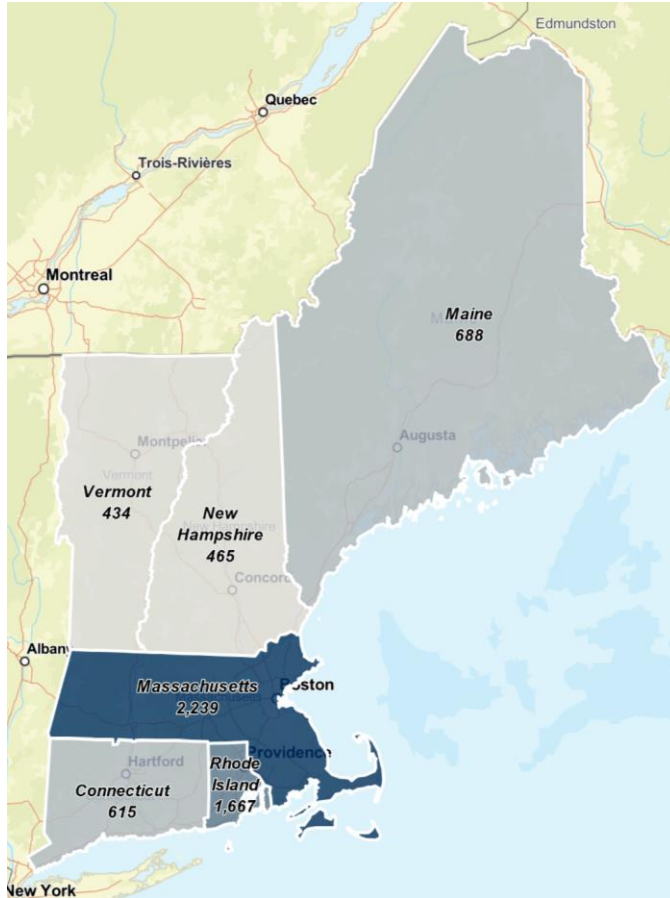
**EXHIBIT 4.8 SOUTHWEST REGION HEAT MAP BY STATE**



**TABLE 4.8 SOUTHWEST REGION VISITATION**

STATE/MSA	CALENDAR YEAR			% CHANGE 2023	
	2023	2022	2019	VS. 2022	VS. 2019
<b>Texas</b>	<b>9,670</b>	<b>9,847</b>	<b>10,792</b>	<b>(2%)</b>	<b>(10%)</b>
Dallas-Fort Worth-Arlington, TX	2,868	2,940	3,564	(2%)	(20%)
Houston-The Woodlands-Sugar Land, TX	2,070	1,667	1,949	24%	6%
Austin-Round Rock, TX	1,115	746	1,139	49%	(2%)
<b>Arkansas</b>	<b>2,003</b>	<b>1,945</b>	<b>1,050</b>	<b>3%</b>	<b>91%</b>
Little Rock-North Little Rock-Conway, AR	903	1,139	365	(21%)	147%
<b>Louisiana</b>	<b>1,619</b>	<b>1,360</b>	<b>2,199</b>	<b>19%</b>	<b>(26%)</b>
<b>Oklahoma</b>	<b>1,293</b>	<b>1,084</b>	<b>1,910</b>	<b>19%</b>	<b>(32%)</b>
<b>New Mexico</b>	<b>953</b>	<b>1,599</b>	<b>1,021</b>	<b>(40%)</b>	<b>(7%)</b>
<b>Southwest Region</b>	<b>15,538</b>	<b>15,835</b>	<b>16,972</b>	<b>(2%)</b>	<b>(8%)</b>

EXHIBIT 4.9 NORTHEAST REGION HEAT MAP BY STATE



## NORTHEAST REGION

The Marquette area had more than 6,100 visits in 2023 from the Northeast region. **Exhibit 4.9** provides a heat map and visitation by state. **Table 4.9** provides visitation by state and the top MSAs for the Northeast region. Visitation from the Northeast region increased 2 percent since 2019 but decreased 24 percent since 2022.

Massachusetts had the highest number of visits in 2023 at more than 2,200 visits. Visitation from Massachusetts made up 37 percent of the Northeast region’s visitation but decreased 35 percent since 2019. Boston generated 64 percent of visits from Massachusetts, down from 81 percent in 2019. Rhode Island, Maine, Connecticut, New Hampshire, and Vermont followed in visitation. Three of the six states, Rhode Island, Maine, and New Hampshire, had increased visitation since 2019, while two states, Rhode Island and Maine, had increased visitation since 2022.

TABLE 4.9 NORTHEAST REGION VISITATION

STATE/MSA	CALENDAR YEAR			% CHANGE 2023	
	2023	2022	2019	VS. 2022	VS. 2019
<b>Massachusetts</b>	<b>2,239</b>	<b>5,015</b>	<b>3,424</b>	<b>(55%)</b>	<b>(35%)</b>
Boston-Cambridge-Newton, MA-NH	1,425	2,968	2,784	(52%)	(49%)
<b>Rhode Island</b>	<b>1,667</b>	<b>827</b>	<b>279</b>	<b>102%</b>	<b>497%</b>
Providence-Warwick, RI-MA	1,667	827	279	102%	497%
<b>Maine</b>	<b>688</b>	<b>373</b>	<b>623</b>	<b>84%</b>	<b>10%</b>
<b>Connecticut</b>	<b>615</b>	<b>764</b>	<b>660</b>	<b>(20%)</b>	<b>(7%)</b>
<b>New Hampshire</b>	<b>465</b>	<b>588</b>	<b>446</b>	<b>(21%)</b>	<b>4%</b>
<b>Vermont</b>	<b>434</b>	<b>471</b>	<b>552</b>	<b>(8%)</b>	<b>(21%)</b>
<b>Northeast Region</b>	<b>6,108</b>	<b>8,038</b>	<b>5,984</b>	<b>(24%)</b>	<b>2%</b>

*Twenty-nine states had increased visitation since 2019, with six of the top 10 states having increased visitation and Illinois and Minnesota increasing by the highest percentages.*

## TRUE VISITATION BY STATE

**Table 4.10** provides visitation ranked by state. Michigan (including only communities farther than 50 miles from the Marquette area) had the highest visitation in all three years. Michigan had more than 770,000 visits in 2023, up 5 percent since 2019. Michigan represented 61 percent of total visitation in 2023, similar to 62 percent in 2019. Wisconsin was the second largest state followed by Illinois, Minnesota, and Ohio. Twenty-nine states had increased visitation since 2019. In the top 10 states for visitation, six states had increased visitation, with Illinois and Minnesota increasing by the highest percentages at 23 percent. Texas decreased by the highest percentage at 10 percent.

**TABLE 4.10 VISITATION BY STATE - BEYOND 50 MILES**

RANK	STATE	CALENDAR YEAR			% CHANGE 2023	
		2023	2022	2019	VS. 2022	VS. 2019
1	Michigan	770,395	751,093	731,520	3%	5%
2	Wisconsin	191,349	186,570	172,972	3%	11%
3	Illinois	64,290	62,279	52,274	3%	23%
4	Minnesota	60,619	56,934	49,340	6%	23%
5	Ohio	22,160	19,836	18,099	12%	22%
6	Indiana	15,480	15,441	14,297	0%	8%
7	Florida	15,143	14,228	15,880	6%	(5%)
8	Texas	9,670	9,847	10,792	(2%)	(10%)
9	California	9,120	10,674	9,203	(15%)	(1%)
10	North Carolina	7,950	6,584	8,110	21%	(2%)
11	Colorado	7,347	6,255	6,119	17%	20%
12	Iowa	7,195	7,468	4,653	(4%)	55%
13	Pennsylvania	6,334	6,321	4,306	0%	47%
14	Arizona	6,136	6,816	6,013	(10%)	2%
15	Missouri	5,652	4,684	2,866	21%	97%
16	New York	5,627	5,498	6,094	2%	(8%)
17	Virginia	5,232	7,562	4,656	(31%)	12%
18	Tennessee	4,490	3,968	5,872	13%	(24%)
19	Georgia	3,931	4,979	4,604	(21%)	(15%)
20	Washington	3,788	5,726	5,194	(34%)	(27%)
21	Kansas	3,043	2,317	1,303	31%	134%
22	North Dakota	2,954	3,634	2,753	(19%)	7%
23	South Carolina	2,662	2,215	1,681	20%	58%
24	Kentucky	2,556	2,373	2,245	8%	14%
25	Alaska	2,269	3,821	1,634	(41%)	39%
26	Massachusetts	2,239	5,015	3,424	(55%)	(35%)

**TABLE 4.10 VISITATION BY STATE - BEYOND 50 MILES (CONTINUED)**

RANK	STATE	CALENDAR YEAR			% CHANGE 2023	
		2023	2022	2019	VS. 2022	VS. 2019
27	Oregon	2,063	1,394	1,531	48%	35%
28	Arkansas	2,003	1,945	1,050	3%	91%
29	Maryland	1,961	2,119	2,549	(7%)	(23%)
30	Utah	1,934	2,060	2,561	(6%)	(24%)
31	Nebraska	1,896	1,420	1,141	34%	66%
32	Wyoming	1,885	907	2,416	108%	(22%)
33	Rhode Island	1,667	827	279	102%	497%
34	Louisiana	1,619	1,360	2,199	19%	(26%)
35	Alabama	1,576	1,320	1,228	19%	28%
36	New Jersey	1,344	1,207	978	11%	37%
37	Oklahoma	1,293	1,084	1,910	19%	(32%)
38	Montana	1,230	1,422	6,149	(14%)	(80%)
39	Nevada	1,162	1,909	1,718	(39%)	(32%)
40	South Dakota	1,151	1,243	1,370	(7%)	(16%)
41	New Mexico	953	1,599	1,021	(40%)	(7%)
42	West Virginia	748	888	914	(16%)	(18%)
43	Idaho	716	683	955	5%	(25%)
44	Mississippi	695	819	1,143	(15%)	(39%)
45	Maine	688	373	623	84%	10%
46	Connecticut	615	764	660	(20%)	(7%)
47	New Hampshire	465	588	446	(21%)	4%
48	Delaware	441	226	483	95%	(9%)
49	Vermont	434	471	552	(8%)	(21%)
50	Hawaii	262	410	1,224	(36%)	(79%)
51	District of Columbia	164	78	271	110%	(39%)
<b>Total</b>		<b>1,266,596</b>	<b>1,239,254</b>	<b>1,181,275</b>	<b>2%</b>	<b>7%</b>

# TRUE VISITATION BY METROPOLITAN AREA

Reviewing visitation by MSA is beneficial in determining the top opportunities for new or expanded air service. Nonstop air service typically relies on local market demand for the service to be successful, with connectivity beyond. This section provides visitation by MSA, including a visitation by month review for several top MSAs.

## VISITATION BY MSA

**Table 5.1** identifies the top 50 MSAs for visitation to the Marquette area.



**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*



The Detroit MSA was the largest MSA for visitation in all three years reviewed from beyond 50 miles of the Marquette area, generating more than 133,000 visits in 2023.

TABLE 5.1 VISITATION BY MSA - BEYOND 50 MILES

RANK	MSA	CALENDAR YEAR			% CHANGE 2023	
		2023	2022	2019	VS. 2022	VS. 2019
21	Dallas-Fort Worth-Arlington, TX	2,868	2,940	3,564	(2%)	(20%)
22	St. Cloud, MN	2,733	1,049	1,126	161%	143%
23	Denver-Aurora-Lakewood, CO	2,698	3,061	2,554	(12%)	6%
24	Pittsburgh, PA	2,298	1,840	837	25%	175%
25	Rockford, IL	2,281	1,941	902	18%	153%
26	Kansas City, MO-KS	2,249	1,615	1,178	39%	91%
27	Seattle-Tacoma-Bellevue, WA	2,248	4,172	3,277	(46%)	(31%)
28	Houston-The Woodlands-Sugar Land, TX	2,070	1,667	1,949	24%	6%
29	Raleigh, NC	2,058	1,758	744	17%	177%
30	Atlanta-Sandy Springs-Roswell, GA	2,035	3,578	2,515	(43%)	(19%)
31	Charlotte-Concord-Gastonia, NC-SC	1,979	1,784	2,158	11%	(8%)
32	Nashville-Davidson--Murfreesboro--Franklin, TN	1,778	1,695	1,849	5%	(4%)
33	Providence-Warwick, RI-MA	1,744	847	279	106%	525%
34	Miami-Fort Lauderdale-West Palm Beach, FL	1,658	1,281	1,363	29%	22%
35	Los Angeles-Long Beach-Anaheim, CA	1,599	2,811	2,352	(43%)	(32%)
36	Boston-Cambridge-Newton, MA-NH	1,497	3,349	2,784	(55%)	(46%)
37	Portland-Vancouver-Hillsboro, OR-WA	1,459	1,202	785	21%	86%
38	Orlando-Kissimmee-Sanford, FL	1,427	890	1,298	60%	10%
39	Fargo, ND-MN	1,308	1,173	1,689	12%	(23%)
40	Dayton, OH	1,305	1,542	474	(15%)	175%
41	Colorado Springs, CO	1,300	921	1,339	41%	(3%)
42	San Diego-Carlsbad, CA	1,296	833	1,326	56%	(2%)
43	Peoria, IL	1,273	839	566	52%	125%
44	Faribault-Northfield, MN	1,272	80	171	1,490%	644%
45	Cedar Rapids, IA	1,267	690	442	84%	187%
46	Davenport-Moline-Rock Island, IA-IL	1,264	1,130	1,100	12%	15%
47	Grand Forks, ND-MN	1,258	1,399	590	(10%)	113%
48	Santa Cruz-Watsonville, CA	1,248	659	0	89%	100%
49	Champaign-Urbana, IL	1,243	1,060	188	17%	561%
50	Cape Coral-Fort Myers, FL	1,200	1,487	1,343	(19%)	(11%)
<b>Total All Visitation - Beyond 50 Miles</b>		<b>1,266,596</b>	<b>1,239,254</b>	<b>1,181,275</b>	<b>2%</b>	<b>7%</b>

Note: Ranking excludes smaller Michigan and Wisconsin communities

The Detroit-Warren-Dearborn MSA was the largest MSA for visitation in all three years reviewed from beyond 50 miles of the Marquette area, with more than 133,000 visits in 2023. The Detroit MSA visitation increased 30 percent since 2019. The Grand Rapids-Wyoming, MI and Chicago-Naperville-Elgin MSAs were the second and third largest MSAs for visitation to the Marquette area, with visitation up 14 percent since 2019 from Grand Rapids and up 21 percent from Chicago. The Lansing-East Lansing and Minneapolis-St. Paul-Bloomington MSAs rounded out the top five. MQT has nonstop service to the largest MSA and to the third largest MSA. Of the top 50 MSAs, thirty-six MSAs had increased visitation since 2019, with nine of the top 10 having increases.



## VISITATION FROM TOP MSAS

Understanding seasonality for the metropolitan areas with the highest visitation and with existing MQT nonstop service helps to set air service priorities.

### Detroit-Warren-Dearborn, MI

The Detroit MSA was the largest MSA for inbound visitation, with more than 133,000 visits in 2023. The visitation by month is represented in **Table 5.2**. Visitation was up in 11 months of 2023 compared to the same months in 2019, decreasing in only March. Visitation averaged 30 percent higher than 2019 but 1 percent lower than 2022. MQT has nonstop service to DTW by Delta Air Lines. For the first six months of 2024, MQT is scheduled to have 16 percent more seats on Delta than in 2023. Maintaining capacity to DTW is important for connecting to points beyond DTW, especially as Delta restores capacity to its DTW hub.

### Chicago-Naperville-Elgin, IL-IN-WI

The Chicago metro area was the third largest MSA in 2023, with 58,000 visits. The visitation by month for the Chicago MSA is represented in **Table 5.3**. Visitation from the Chicago MSA increased by 21 percent since 2019, with increases in eight months of the year. Compared to 2022, visitation increased 2 percent, increasing in seven of 12 months. American Airlines provides service to ORD, with scheduled seats up for the first six months of 2024 by 39 percent compared to the same months in 2023. Maintaining and expanding service to ORD should be an important air service priority for MQT.

**TABLE 5.2 VISITATION BY MONTH – DETROIT-WARREN-DEARBORN, MI MSA**

MONTH	CALENDAR YEAR			% CHANGE 2023	
	2023	2022	2019	VS. 2022	VS. 2019
January	7,727	9,266	4,862	(17%)	59%
February	9,992	8,993	5,900	11%	69%
March	6,017	7,282	6,822	(17%)	(12%)
April	8,492	9,855	6,232	(14%)	36%
May	8,435	7,426	5,601	14%	51%
June	10,702	10,284	8,315	4%	29%
July	20,740	18,357	16,750	13%	24%
August	23,475	23,060	18,732	2%	25%
September	11,977	11,623	8,097	3%	48%
October	13,020	13,567	9,785	(4%)	33%
November	6,808	7,225	6,427	(6%)	6%
December	5,815	7,450	5,066	(22%)	15%
<b>Total</b>	<b>133,200</b>	<b>134,388</b>	<b>102,589</b>	<b>(1%)</b>	<b>30%</b>

**TABLE 5.3 VISITATION BY MONTH – CHICAGO-NAPERVILLE-ELGIN, IL-IN-WI MSA**

MONTH	CALENDAR YEAR			% CHANGE 2023	
	2023	2022	2019	VS. 2022	VS. 2019
January	2,312	3,443	3,054	(33%)	(24%)
February	3,553	3,895	2,702	(9%)	31%
March	3,118	2,867	3,616	9%	(14%)
April	3,359	3,945	2,099	(15%)	60%
May	4,003	3,173	3,133	26%	28%
June	5,072	5,019	2,739	1%	85%
July	10,533	8,810	5,966	20%	77%
August	7,637	7,043	7,960	8%	(4%)
September	6,443	5,255	4,999	23%	29%
October	6,478	6,460	5,120	0%	27%
November	3,005	3,732	2,822	(19%)	6%
December	2,487	2,974	3,660	(16%)	(32%)
<b>Total</b>	<b>58,000</b>	<b>56,616</b>	<b>47,870</b>	<b>2%</b>	<b>21%</b>

*Minneapolis had significant inbound visitation to the Marquette area in 2023, increasing by 22 percent over 2019 and 4 percent over 2022.*

### Minneapolis-St. Paul-Bloomington, MN-WI

The Minneapolis metro area was the fifth largest MSA, with nearly 34,000 visits. The visitation by month is represented in **Table 5.4**. Visitation was up 22 percent compared to 2019 and increased in nine months of the year, with the largest increase in September when visitation more than doubled. Compared to 2022, visitation increased 4 percent, increasing in eight of the 12 months. Continued improvement in visitation could support a case for the restoration of service to MSP, a key air service market for MQT.

### Denver-Aurora-Lakewood, CO

The Denver MSA was the 23<sup>rd</sup> largest MSA for visits in 2023, with nearly 2,700 visits. The visitation by month is represented in **Table 5.5**. Visitation from the Denver MSA averaged 6 percent higher than 2019, with the largest percentage increases in February and June. Compared to 2022, however, visitation declined 12 percent, decreasing in six of the 12 months. Including visitation from the Boulder, Colorado Springs, Fort Collins, and Greeley MSAs, visitation was more than 5,900 visits and increased 38 percent since 2019 and 24 percent since 2022. While visitation from the greater metro area is increasing, the long stage length to Denver International Airport (DEN) and relatively low inbound visitation makes DEN service a less likely possibility at MQT in the short term.

**TABLE 5.4 VISITATION BY MONTH – MINNEAPOLIS-ST. PAUL-BLOOMINGTON, MN-WI MSA**

MONTH	CALENDAR YEAR			% CHANGE 2023	
	2023	2022	2019	VS. 2022	VS. 2019
January	1,782	2,384	1,746	(25%)	2%
February	1,921	1,479	2,319	30%	(17%)
March	1,633	1,473	2,062	11%	(21%)
April	1,949	1,992	1,403	(2%)	39%
May	1,972	1,952	1,952	1%	1%
June	3,009	2,970	2,868	1%	5%
July	4,798	4,561	4,779	5%	0%
August	5,927	4,909	3,925	21%	51%
September	3,882	3,013	1,679	29%	131%
October	3,744	4,472	2,110	(16%)	77%
November	1,760	2,052	1,330	(14%)	32%
December	1,530	1,257	1,589	22%	(4%)
<b>Total</b>	<b>33,907</b>	<b>32,514</b>	<b>27,762</b>	<b>4%</b>	<b>22%</b>

**TABLE 5.5 VISITATION BY MONTH – DENVER-AURORA-LAKEWOOD, CO MSA**

MONTH	CALENDAR YEAR			% CHANGE 2023	
	2023	2022	2019	VS. 2022	VS. 2019
January	41	87	26	(53%)	58%
February	152	96	26	58%	485%
March	78	49	143	59%	(45%)
April	76	194	51	(61%)	49%
May	46	136	115	(66%)	(60%)
June	385	61	63	531%	511%
July	771	893	861	(14%)	(10%)
August	460	934	615	(51%)	(25%)
September	181	296	175	(39%)	3%
October	242	217	169	12%	43%
November	141	20	217	605%	(35%)
December	125	78	93	60%	34%
<b>Total</b>	<b>2,698</b>	<b>3,061</b>	<b>2,554</b>	<b>(12%)</b>	<b>6%</b>

# DESTINATION ANALYSIS

This section provides the estimated visitation to selected destinations from the Marquette Micro (**Exhibit 6.1**). For each selected destination, seasonality is reviewed and a comparison to visitation per capita to other Micros/MSAs is provided. At the time of this report, the full 2023 calendar year data was not available; however, comparisons to the first six months of 2023 is provided by destination for reference.

## STUDY AREAS

The Marquette outbound visitation will assist in air service development efforts by quantifying the potential demand for nonstop air service. Outbound visitation from the Marquette Micro is compared to several Micro/MSAs. The Micros/MSAs were selected based on population size, geography, and existing air service (**Table 6.1**).

**EXHIBIT 6.1 MARQUETTE, MI STUDY AREA**



**TABLE 6.1 COMPARISON MARKETS**

MICRO/MSA	2022 POPULATION	FLIGHTS				SEATS			
		2022	PER 1,000 POP.	2019	% CHG	2022	PER 1,000 POP	2019	% CHG
Sault Ste. Marie, MI*	37,560	720	19.2	677	6%	36,000	958.5	33,850	6%
<b>Marquette, MI*</b>	<b>66,995</b>	<b>1,102</b>	<b>16.4</b>	<b>1,412</b>	<b>(22%)</b>	<b>55,100</b>	<b>822.4</b>	<b>76,165</b>	<b>(28%)</b>
Grand Island, NE	76,931	79,803	1,037.3	1,142	6,888%	74,672	970.6	85,178	(12%)
Grand Forks, ND	103,593	111,831	1,079.5	2,112	5,195%	100,623	971.3	141,479	(29%)
Traverse City, MI*	153,319	353,893	2,308.2	5,728	6,078%	413,719	2,698.4	368,777	12%
Wausau, WI	164,485	91,036	553.5	3,570	2,450%	138,960	844.8	178,524	(22%)
Eau Claire, WI	173,102	27,612	159.5	728	3,693%	36,300	209.7	36,400	(0%)
Saginaw, MI	189,342	84,258	445.0	2,979	2,728%	91,427	482.9	168,842	(46%)

Source: Micro/MSA Population = Woods & Poole Economics, Inc. 2022; Note: \* = Micro

*Marquette outbound visitation data will assist in air service development efforts to better understand overall demand to destination markets regardless of the mode of travel.*

### 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**



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%





## VISITATION TO SELECT MSAS

Understanding the seasonality for the selected destination markets and the trends by month can be useful for understanding air service opportunities.

### Chicago, IL

Of the five selected destination markets, the Chicago area was the largest, with nearly 29,000 visits from the Marquette area in 2022. **Table 6.3** provides the visitation by month to Chicago.

Visitation was down compared to 2019 by 42 percent, with significant decreases in nine months of the year. February and May had increases of 28 percent and 191 percent, respectively, while July remained unchanged. May was the peak month for visitation in 2022, followed by June and July. The three months made up 38 percent of annual visitation. The lowest months for visitation were September and October at just 4 percent each of the total. Visitation in 2022 remained down 38 percent compared to 2021. In the first six months of 2023, visitation increased 9 percent compared to the same months in 2022.

**Table 6.4** (sorted by 2022 visitation) provides a comparison of visitation and air service to select Micros/MSAs. Like Marquette, all of the comparison markets had decreased visitation to Chicago in 2022 compared to 2019. Eau Claire had the highest visitation overall to Chicago of the comparison markets. Of the markets with nonstop service to Chicago, Marquette had the lowest visitation in aggregate; however, for the propensity for residents to travel to Chicago, Marquette had the highest of all the compare markets with 431.1 visits generated per 1,000 population from the catchment area.

**TABLE 6.3 VISITATION BY MONTH - CHICAGO, IL**

MONTH	2023	2022	2021	2019	% CHG 2022 VS.	
					2021	2019
January	2,131	2,016	2,314	6,230	(13%)	(68%)
February	1,890	1,954	3,339	1,525	(41%)	28%
March	2,868	2,627	4,159	4,681	(37%)	(44%)
April	2,651	1,917	3,122	3,176	(39%)	(40%)
May	2,946	4,331	5,157	1,490	(16%)	191%
June	4,702	2,894	4,556	5,300	(36%)	(45%)
July	-	3,837	4,074	3,837	(6%)	0%
August	-	2,622	1,980	10,861	32%	(76%)
September	-	1,139	7,556	2,657	(85%)	(57%)
October	-	1,266	2,127	2,485	(40%)	(49%)
November	-	2,001	3,354	2,217	(40%)	(10%)
December	-	2,275	4,495	5,245	(49%)	(57%)
<b>Total</b>	<b>17,188</b>	<b>28,879</b>	<b>46,233</b>	<b>49,704</b>	<b>(38%)</b>	<b>(42%)</b>

**TABLE 6.4 VISITATION AND AIR SERVICE COMPARISON - CHICAGO, IL**

MARKET	2022 POPULATION	VISITATION				SEATS			
		2022	PER 1,000 POP.	2019	% CHG	2022	PER 1,000 POP.	2019	% CHG
Eau Claire, WI	173,102	61,045	352.7	69,910	(13%)	24,450	141.2	36,400	(33%)
Traverse City, MI	153,319	58,875	384.0	100,056	(41%)	141,551	923.2	172,492	(18%)
Wausau, WI	164,485	57,485	349.5	77,366	(26%)	37,350	227.1	99,074	(62%)
Saginaw, MI	189,342	47,596	251.4	63,256	(25%)	37,460	197.8	50,650	(26%)
<b>Marquette, MI</b>	<b>66,995</b>	<b>28,879</b>	<b>431.1</b>	<b>49,704</b>	<b>(42%)</b>	<b>23,000</b>	<b>343.3</b>	<b>26,915</b>	<b>(15%)</b>
Grand Forks, ND	103,593	10,800	104.3	16,183	(33%)	-	-	-	-
Grand Island, NE	76,931	9,823	127.7	12,907	(24%)	-	-	-	-
Sault Ste. Marie, MI	37,560	8,435	224.6	8,854	(5%)	-	-	-	-
<b>Market Average</b>	<b>120,666</b>	<b>35,367</b>	<b>293.1</b>	<b>49,780</b>	<b>(29%)</b>	-	-	-	-

*Marquette's propensity to visit the Minneapolis area was 214.5 visits per 1,000 population, which was the fourth highest of the selected comparison markets.*

### Visitation to Minneapolis, MN

Of the five selected destination markets, the Minneapolis area was the second largest, with more than 14,000 visits from the Marquette area in 2022. **Table 6.5** provides the visitation by month to Minneapolis. Visitation decreased 19 percent from 2019 to 2022; however, four months in 2022 increased over 2019, with September more than doubling. The peak months for visitation in 2022 were June and July at 15 and 27 percent of the total, respectively. The lowest months for visitation were January, February, and October at 5, 4, and 3 percent of visitation, respectively. Visitation in 2022 increased 26 percent compared to 2021, and visitation increased 23 percent for the first six months of 2023 compared to the same period in 2022.

**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%
<b>Total</b>	<b>7,838</b>	<b>14,371</b>	<b>11,412</b>	<b>17,780</b>	<b>26%</b>	<b>(19%)</b>

**Table 6.6** provides a comparison of visitation and air service to select Micros/MSAs to Minneapolis. Among the comparison markets, all markets except Eau Claire and Traverse City had decreased visitation to Minneapolis. Marquette visitation declined 19 percent, which was above the average decrease in visitation. Marquette's propensity to visit Minneapolis was 214.5 visits per 1,000 population, which was below the market average of 560.0 but the fourth highest among the compare markets. Of the eight markets, five had nonstop service in 2022 to Minneapolis. Marquette's service, however, ended in January, likely impacting visitation to Minneapolis.

**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%)
<b>Marquette, MI</b>	<b>66,995</b>	<b>14,371</b>	<b>214.5</b>	<b>17,780</b>	<b>(19%)</b>	<b>450</b>	<b>6.7</b>	<b>18,250</b>	<b>(98%)</b>
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%
<b>Market Average</b>	<b>120,666</b>	<b>67,571</b>	<b>560.0</b>	<b>73,704</b>	<b>(8%)</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>



### Visitation to Orlando, FL

Orlando was the third largest market for visitation of the selected destinations, with more than 5,000 visits from the Marquette area in 2022. **Table 6.7** provides the visitation by month to Orlando. Visitation decreased 29 percent from 2019; however, visitation increased in five months of the year. April was the peak month for visitation in 2022 with 27 percent of the total, followed by July with 16 percent. Compared to 2021, visitation increased 10 percent. In the first six months of 2023, visitation increased 51 percent compared to the same period in 2022.

MONTH	2023	2022	2021	2019	% CHG 2022 VS.	
					2021	2019
January	529	293	162	663	81%	(56%)
February	812	332	696	658	(52%)	(50%)
March	2,286	521	1,001	2,782	(48%)	(81%)
April	818	1,399	795	516	76%	171%
May	375	0	360	294	(100%)	(100%)
June	226	800	520	538	54%	49%
July	-	826	241	568	243%	45%
August	-	0	344	316	(100%)	(100%)
September	-	196	198	0	(1%)	100%
October	-	302	60	208	403%	45%
November	-	174	102	273	71%	(36%)
December	-	374	251	572	49%	(35%)
<b>Total</b>	<b>5,046</b>	<b>5,217</b>	<b>4,730</b>	<b>7,388</b>	<b>10%</b>	<b>(29%)</b>

**Table 6.8** provides a comparison of visitation and air service to select Micros/MSAs to Orlando. Four markets had increased visitation in 2022 compared to 2019, while Marquette had the highest percentage decrease. Marquette had a propensity for visitation to Orlando of 77.9 visits per 1,000 population, which was lower than the compare market average of 126.0. With the first half of 2023 showing positive signs of improvement, increased visitation to levels comparable with Grand Forks, which had nonstop service to Orlando in 2022, would contribute to the business case for air service.

TABLE 6.8 VISITATION AND AIR SERVICE COMPARISON - ORLANDO, FL

MARKET	2022 POPULATION	VISITATION				SEATS			
		2022	PER 1,000 POP.	2019	% CHG	2022	PER 1,000 POP.	2019	% CHG
Saginaw, MI	189,342	28,340	149.7	31,067	(9%)	-	-	-	-
Traverse City, MI	153,319	25,496	166.3	26,801	(5%)	10,371	67.6	3,492	197%
Eau Claire, WI	173,102	22,728	131.3	21,078	8%	-	-	-	-
Wausau, WI	164,485	19,992	121.5	13,484	48%	-	-	-	-
Grand Forks, ND	103,593	9,443	91.2	9,398	0%	5,034	48.6	3,402	48%
Sault Ste. Marie, MI	37,560	5,587	148.7	5,339	5%	-	-	-	-
<b>Marquette, MI</b>	<b>66,995</b>	<b>5,217</b>	<b>77.9</b>	<b>7,388</b>	<b>(29%)</b>	-	-	-	-
Grand Island, NE	76,931	4,815	62.6	5,198	(7%)	-	-	-	-
<b>Market Average</b>	<b>120,666</b>	<b>15,202</b>	<b>126.0</b>	<b>14,969</b>	<b>2%</b>	-	-	-	-

*Marquette had 42.5 visits to Denver per 1,000 population, which was below the compare market average of 88.1 and the third lowest of the eight comparison markets.*

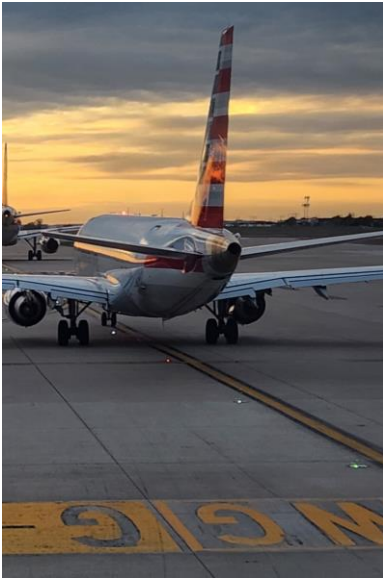
### Visitation to Denver, CO

Of the five selected destination markets, Denver was the fourth largest, with nearly 3,000 visits from the Marquette area in 2022. **Table 6.9** provides the visitation by month to Denver. Visitation decreased 33 percent from 2019 and had significant variation by month, with May increasing by the highest percentage at 219 percent and January decreasing by the highest percentage at 100 percent. Visitation in 2022 was down 41 percent compared to 2021. The peak month for visitation in 2022 was June at 16 percent of the total, followed by July at 11 percent. The lowest month for visitation at 2 percent was February. Comparing the first six months of 2023 to the same period in 2022, visitation increased 13 percent.

MONTH	2023	2022	2021	2019	% CHG 2022 VS.	
					2021	2019
January	116	0	265	229	(100%)	(100%)
February	32	111	904	214	(88%)	(48%)
March	185	350	233	392	50%	(11%)
April	258	240	207	155	16%	55%
May	299	201	576	63	(65%)	219%
June	524	354	710	304	(50%)	16%
July	-	371	523	166	(29%)	123%
August	-	243	701	1,129	(65%)	(78%)
September	-	70	153	357	(54%)	(80%)
October	-	316	103	155	207%	104%
November	-	119	225	344	(47%)	(65%)
December	-	470	261	736	80%	(36%)
<b>Total</b>	<b>1,414</b>	<b>2,845</b>	<b>4,861</b>	<b>4,244</b>	<b>(41%)</b>	<b>(33%)</b>

**Table 6.10** provides a comparison of visitation and air service to select Micros/MSAs. Visitation to Denver decreased from each of the comparison markets, except Grand Island and Eau Claire. Wausau had the highest percentage decrease in visitation in 2022, down 52 percent from 2019. Marquette had 42.5 visits to Denver per 1,000 population, which was the third lowest of the comparison markets and below the compare market average of 88.1. Of the comparison markets, only Traverse City had service to Denver in 2022.

MARKET	2022 POPULATION	VISITATION				SEATS			
		2022	PER 1,000 POP.	2019	% CHG	2022	PER 1,000 POP.	2019	% CHG
Grand Island, NE	76,931	34,912	453.8	32,354	8%	-	-	-	-
Eau Claire, WI	173,102	15,127	87.4	13,750	10%	-	-	-	-
Grand Forks, ND	103,593	10,214	98.6	15,190	(33%)	-	-	-	-
Traverse City, MI	153,319	9,839	64.2	13,125	(25%)	18,430	120.2	5,722	222%
Wausau, WI	164,485	5,363	32.6	11,183	(52%)	-	-	-	-
Saginaw, MI	189,342	4,281	22.6	5,700	(25%)	-	-	-	-
<b>Marquette, MI</b>	<b>66,995</b>	<b>2,845</b>	<b>42.5</b>	<b>4,244</b>	<b>(33%)</b>	-	-	-	-
Sault Ste. Marie, MI	37,560	2,430	64.7	898	171%	-	-	-	-
<b>Market Average</b>	<b>120,666</b>	<b>10,626</b>	<b>88.1</b>	<b>12,056</b>	<b>(12%)</b>	-	-	-	-



### Visitation to Dallas, TX

Of the five selected destination markets, Dallas the had the least visitation from the Marquette area, with nearly 2,200 visits in 2022. **Table 6.11** provides the visitation by month to Dallas.

Visitation increased 57 percent from 2019, with May, July, and August increasing by the highest percentages. Visitation in 2022 was down only 1 percent over 2021. The peak months for visitation in 2022 were February, May, and August. The lowest month for visitation was September. In the first six months of 2023, visitation increased 5 percent compared to the same period in 2022.

**TABLE 6.11 VISITATION BY MONTH - DALLAS, TX**

MONTH	2023	2022	2021	2019	% CHG 2022 VS.	
					2021	2019
January	115	99	0	67	-	48%
February	125	261	270	130	(3%)	101%
March	437	265	59	396	349%	(33%)
April	124	220	148	127	49%	73%
May	231	377	274	61	38%	518%
June	341	91	176	141	(48%)	(35%)
July	-	193	127	40	52%	383%
August	-	166	274	31	(39%)	435%
September	-	30	245	116	(88%)	(74%)
October	-	96	0	104	-	(8%)
November	-	168	218	0	(23%)	-
December	-	212	409	170	(48%)	25%
<b>Total</b>	<b>1,373</b>	<b>2,178</b>	<b>2,200</b>	<b>1,383</b>	<b>(1%)</b>	<b>57%</b>

**Table 6.12** provides a comparison of visitation and air service to select Micros/MSAs. Visitation to Dallas declined an average of 8 percent among the compare markets, with only Grand Island, Grand Forks, and Marquette increasing. Marquette had the highest percentage increase at 57 percent. Marquette had 32.5 visits per 1,000 population, which was lower than the compare market average of 69.3. Only Grand Island and Traverse City had nonstop air service in 2022.

**TABLE 6.12 VISITATION AND AIR SERVICE COMPARISON - DALLAS, TX**

MARKET	2022 POPULATION	VISITATION				SEATS			
		2022	PER 1,000 POP.	2019	% CHG	2022	PER 1,000 POP.	2019	% CHG
Grand Island, NE	76,931	17,028	221.3	12,675	34%	40,230	522.9	43,418	(7%)
Saginaw, MI	189,342	12,084	63.8	13,711	(12%)	-	-	-	-
Traverse City, MI	153,319	10,148	66.2	15,704	(35%)	10,412	67.9	9,880	5%
Grand Forks, ND	103,593	9,704	93.7	9,325	4%	-	-	-	-
Eau Claire, WI	173,102	8,198	47.4	11,719	(30%)	-	-	-	-
Wausau, WI	164,485	5,590	34.0	5,920	(6%)	-	-	-	-
<b>Marquette, MI</b>	<b>66,995</b>	<b>2,178</b>	<b>32.5</b>	<b>1,383</b>	<b>57%</b>	-	-	-	-
Sault Ste. Marie, MI	37,560	1,957	52.1	2,473	(21%)	-	-	-	-
<b>Market Average</b>	<b>120,666</b>	<b>8,361</b>	<b>69.3</b>	<b>9,114</b>	<b>(8%)</b>	-	-	-	-



# CONCLUSIONS

Marquette attracted nearly 1.27 million visits in 2023 from beyond 50 miles with a summer-season peak. Visitation in 2023 increased 7 percent compared to 2019 and 2 percent compared to 2022. July was the peak month for visitation in 2023 versus August in 2019 and 2022. November was the lowest month for visitation in 2023 versus January in 2019 and March in 2022.



Like most markets, inbound visitation is regionalized, with 89 percent of visitation from the Great Lakes region. The Southeast region was the second highest for visitation, followed by the East and Northwest regions. Visitation increased in five of the nine regions from 2019 to 2023, while four regions had increased visitation since 2022. Visitation was heavily weighted to the state of Michigan (beyond 50 miles), with 61 percent of the total. The top MSAs for inbound visitation included the Detroit-Warren-Dearborn, Grand Rapids-Wyoming, Chicago-Naperville-Elgin, Lansing-East Lansing, and Minneapolis-St. Paul-Bloomington MSAs, with nonstop air service from MQT to two of the top five markets, DTW and ORD.

Five destination markets were reviewed to compare the Marquette outbound visitation to other select MSAs. The five markets, listed by highest visitation, were Chicago, Minneapolis, Orlando, Denver, and Dallas. Since 2019, visitation increased only to Dallas. Marquette's visitation per capita was above the compare market average for Chicago but below the average for the other markets reviewed.

MQT has existing air service by Delta Air Lines to the largest MSA for visitation, Detroit. American Airlines serves the third largest MSA for visitation, the Chicago metro area. Supporting existing service is the top priority for MQT's air service development efforts along with pursuing additional opportunities, such as restoration of MSP service with Delta.



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