



Chapter Three: Survey Findings

INTRODUCTION

In order to have a better understanding of the travel patterns of individuals and businesses in the State of Iowa, the following surveys were administered in fall of 2006:

- Airline Passenger Survey
- Iowa Business Survey
- Parking Lot Surveys/Inventories

The results of these surveys provide data for understanding resident and visitor travel patterns as well as business and leisure travel patterns. A statewide summary of the passenger and business surveys is presented in this chapter. The results of the passenger survey are also presented for individual airports. County license plate information was gathered during the parking lot surveys/inventories. This data will be used to develop county demand profiles found in Chapter Four.

Airline Passenger Survey Methodology

Passenger surveys have proven to be an effective means of collecting information from air travelers regarding their travel habits and patterns. Passenger surveys were employed in this study to generate a “snapshot” of Iowa travel patterns. Information related to travel purpose, airport usage, method of ticket purchase, airport travel times, and other data obtained from the passenger surveys, is utilized as a cross check on other data sources and to support later study analyses. It is important to recognize that information collected from this study’s passenger surveys reflect only a portion of each airport’s travel characteristics. Travel patterns for passengers associated with one of the eight commercial airports in Iowa who routinely drive to another airport to start their air travel were not captured as part of the passenger surveys.

Passenger surveys were conducted at the eight commercial service airports in Iowa. Due to the level of Iowa resident usage of the Border Airports at Omaha and Moline, these airports were also asked to participate in the passenger survey effort. Eppley Airfield in Omaha declined to participate, but passenger surveys were completed at the Quad City International Airport. The passenger surveys were comprised of 14 air service-related questions and were conducted by interviewers at the airports to help facilitate responsiveness and completeness of answers. At the smaller airports in the State, the survey was also distributed by airline agents to increase the sample size. Several airports, including Dubuque Regional Airport, Sioux Gateway Airport, and Waterloo Regional Airport, had limited participation in this additional survey effort.



Table 3-1 presents the number of individual survey responses collected at each airport. A total of 636 surveys were completed at the nine airports. Data gathered encompassed demographic information, passenger travel purposes, passenger travel patterns, passenger perceptions of the airport, as well as general passenger comments. Passenger survey results for each of the commercial airports in Iowa and for Quad City International Airport are presented at the end of this chapter. Due to the limited survey responses at a few airports, further investigation was undertaken as needed to verify survey findings.

**Table 3-1
Passenger Survey Airports and Responses**

Airport	Number of Survey Responses
Southeast Iowa Regional Airport	53
The Eastern Iowa Airport	147
Des Moines International Airport	152
Dubuque Regional Airport	25
Fort Dodge Regional Airport	79
Mason City Municipal Airport	57
Quad City International Airport	85
Sioux Gateway Airport	19
Waterloo Regional Airport	19
Total Responses:	636
Source: Wilbur Smith Associates	

Business Survey Methodology

Business travel is generally the most consistent and reliable source of commercial air travel in many market areas. It is very important for an airport to have an understanding of the needs of its business travelers. When deciding to introduce new air service, an airline often wants to have a commitment from the local business community to use the service. Businesses that use commercial airline service are less affected by fares than leisure travelers and are typically less willing to drive long distances to begin an airline trip.

Due to the importance of business travel at all of the commercial airports in Iowa, an additional business survey was undertaken in the fall of 2006. A business survey was administered to help identify travel patterns for businesses that rely on commercial air service. Data was also sought from businesses related to their propensity to drive to a more distant airport rather than fly from their local or closest airport, as well as on their dependence on air transportation to conduct business. Most of the largest employers in the State were contacted and asked to participate in this survey. Twenty-one businesses across Iowa provided information on their air travel patterns and needs. A statewide summary of responses from the business survey is presented later in this chapter.

Parking Lot Inventories Methodology

Parking lot inventories were also completed at all eight commercial airports in Iowa and at each of the Border Airports. These inventories recorded parked cars in on-airport parking lots as well as cars in off-airport parking lots. The state and county on each car's license plate were noted. While the



results of the parking lot inventories are not presented in this chapter, they helped to establish market areas for each of the commercial service airports in Iowa, to determine the distribution of Iowa related air service demand among the eight commercial airports in Iowa, and to measure passenger usage of out of state airports. The information obtained from the parking lot inventories is used in subsequent chapters of this study.

STATEWIDE SUMMARY OF PASSENGER AND BUSINESS SURVEYS

This section summarizes information obtained during the survey efforts. This summary reflects information for commercial airports in Iowa. A discussion of the individual airport passenger survey results is presented later in the chapter; this later section also presents passenger survey results for Quad City International Airport.

Statewide Summary – Passenger Demographics

The passenger survey asked several questions that were related to passenger demographics. Of all passengers surveyed at commercial service airports in Iowa, 58 percent were men and 42 percent were women. As shown in **Table 3-2**, half of all survey respondents were 35-54 years of age, 25 percent of the respondents were under 35 years old and the remaining 25 percent were over 55 years old. This information can be used by study airports for follow-on targeted marketing efforts.

Table 3-2
Demographics of Air Travelers Using Airports in Iowa

Gender	Male	58%
	Female	42%
Age	Under 18	1%
	18-34	24%
	35-54	50%
	55-69	21%
	Over 69	4%
Source: 2006 Passenger Survey		



Statewide Summary - Resident versus Visitor Travel

Approximately 53 percent of the survey respondents noted that they were Iowa residents, while 47 percent noted that they were visitors to the State. **Table 3-3** summarizes, for each of the eight commercial airports in Iowa, information related to the percentage of passenger survey respondents that reported being visitors versus residents. As this table shows, variation in the mix of resident and visitor travelers was reported among the airports. This variation in some instances is most likely tied to the survey reporting period, the travelers who elected to participate in the survey, and the number of surveys that were completed.

**Table 3-3
Comparison of Resident versus Visitor Travel**

Airport	Residents		Visitors	
	Survey Results	US DOT O&D Survey	Survey Results	US DOT O&D Survey
Southeast Iowa Regional Airport	25%	45%	75%	55%
The Eastern Iowa Airport	56%	61%	44%	39%
Des Moines International Airport	55%	59%	45%	41%
Dubuque Regional Airport	64%	57%	36%	43%
Fort Dodge Regional Airport	58%	63%	42%	37%
Mason City Municipal Airport	54%	58%	46%	42%
Sioux Gateway Airport	21%	49%	79%	51%
Waterloo Regional Airport	69%	57%	31%	43%
IOWA AVERAGE	53%	59%	47%	41%
Sources: 2006 Passenger Survey; US DOT O&D Survey				

As this table reflects, for the two largest commercial airports serving Des Moines and Cedar Rapids, the mix of visitor versus resident travelers is quite similar. Passenger survey results show that commercial airports serving Sioux City and Burlington reported the lowest percentage of resident travelers. Additional information from the US DOT was used in this study to further investigate the distribution of resident versus visitor travel for commercial airports in Iowa.

US DOT information that helps to portray the distribution between resident and visitor travelers for each of the eight Iowa airports is also shown in Table 3-3. While the percentages do differ, the balance between resident and visitor travel from the passenger survey and the US DOT data are the same. Six of the eight airports have more resident than visitor related travel. This information will be used in the formulation of individual airport action plans at the conclusion of this study.



Statewide Summary - Trip Purpose

Table 3-4 summarizes information collected from the passenger surveys as it relates to reported trip purpose. As shown, with the exception of the airport serving Waterloo, for all other commercial airports in Iowa, the highest percentage of all travel was reported to be business related. Results for this question for Waterloo may be influenced by the reporting period and/or the passengers who elected to participate in the survey.

Table 3-4
Reported Distribution of Trip Purpose

Airport	Business	Personal	Vacation	Other
Southeast Iowa Regional Airport	64%	20%	14%	2%
The Eastern Iowa Airport	62%	18%	19%	1%
Des Moines International Airport	48%	28%	22%	2%
Dubuque Regional Airport	40%	36%	20%	4%
Fort Dodge Regional Airport	45%	33%	21%	1%
Mason City Municipal Airport	43%	36%	21%	0
Sioux Gateway Airport	78%	11%	111%	0
Waterloo Regional Airport	21%	53%	21%	5%
IOWA AVERAGE	51%	28%	19%	1%
Source: 2006 Passenger Survey				

While Iowa residents generate outbound travel for vacation related purposes, Iowa attracts a relatively low percentage of visitors for vacation-related travel. Therefore, higher percentages of business related travel are logical. Information summarized in this table is important because it helps to demonstrate the important link between business travel and commercial airline service at the eight commercial airports in Iowa. If commercial airports in Iowa are to maintain and/or improve their commercial airline service, support from the businesses in their individual market areas is vital. Action plans prepared for each the eight airports at the conclusion of this project will consider ways to engage Iowa businesses as it relates to air service retention and improvement.



Statewide Summary - Method of Ticket Purchase

Table 3-5 summarizes information from those participating in the passenger survey at each airport regarding method of ticket purchase. As the information in this table reflects, for passengers at most of the eight airports at least 45 percent of their tickets are still reportedly being purchased either through a corporate booking function or some other type of travel agent. Working with corporate travel coordinators and local travel agents is one method for helping to increase local airport usage. When travelers purchase their tickets through websites or directly from the airlines, there is less opportunity to influence their decision for selecting a departure airport. As determined by this study's business survey, use of corporate travel coordinators and travel agents when Iowa businesses purchase their airline tickets is even higher. This study's business survey reported that an estimated 70 percent of the airline tickets purchased by responding businesses bought either through a travel agent or an in-house corporate travel coordinator. This information is important because it will help to support the development of individual action plans for each of the commercial service airports in Iowa.

**Table 3-5
Reported Method of Ticket Purchase**

Airport	Corporate Travel Account	Travel Agent	Airline Website	Other Travel Website	Airline Direct
Southeast Iowa Regional Airport	31%	21%	29%	13%	6%
The Eastern Iowa Airport	39%	8%	27%	17%	9%
Des Moines International Airport	34%	11%	34%	14%	7%
Dubuque Regional Airport	24%	4%	32%	24%	16%
Fort Dodge Regional Airport	19%	19%	42%	12%	8%
Mason City Municipal Airport	19%	18%	38%	16%	9%
Sioux Gateway Airport	63%	16%	5%	11%	5%
Waterloo Regional Airport	26%	11%	37%	26%	0%
IOWA AVERAGE	32%	13%	32%	15%	8%
Source: 2006 Passenger Survey					



Statewide Summary- Travel Times to Airports

Table 3-6 provides information that summarizes how long it reportedly took departing passengers to reach the airport where they participated in this study's passenger survey. Again, it should be noted that this information is influenced by those that elected to participate in the survey. The responses from this question suggest that some travelers may have reported more than just their door-to-door drive time in their response.

**Table 3-6
Trip Time to Airports**

Airport	Less than 30 Minutes	30-60 Minutes	60-90 Minutes	90-120 Minutes	Over 120 Minutes
Southeast Iowa Regional Airport	69%	25%	2%	2%	2%
The Eastern Iowa Airport	15%	38%	37%	6%	3%
Des Moines International Airport	1%	23%	45%	23%	8%
Dubuque Regional Airport	72%	24%	0%	0%	4%
Fort Dodge Regional Airport	60%	23%	10%	0%	6%
Mason City Municipal Airport	49%	35%	9%	5%	2%
Sioux Gateway Airport	42%	50%	4%	4%	0%
Waterloo Regional Airport	16%	79%	5%	0%	0%
IOWA AVERAGE	30%	32%	25%	9%	5%

Source: 2006 Passenger Survey

As shown, drive times to the smaller commercial airports in Iowa (those served by only one carrier) usually are under one hour, with a high percentage typically being under 30 minutes. Only at the commercial airports serving Des Moines and Cedar Rapids where multiple carriers provide service do passengers report with any frequency that they drive 60 minutes or more to reach the airport. This information will be used later in this study as estimates of future demand for all of the commercial airports in Iowa are developed.



Statewide Summary- Airport Facility/Amenity Ratings

Departing passengers were asked to provide input on their experience with certain airport facilities and amenities. In this process, 5 represented a good experience, while 1 signified, from the passenger's viewpoint, the experience was not good. **Table 3-7** summarizes the average scores for each facility/amenity by airport. **Table 3-8** provides the relative ranking of facilities/amenities at each airport from the passenger's perspective. This type of information will be used in the development of airport specific action plans.

Table 3-7
Scoring of Facilities/Amenities

Airport	Parking	Ticket Counter/Lobby	Security Experience	Restaurants/Bar	News & Gifts	Restrooms	Clarity and Usefulness of Signage	Departure Gate Area
Southeast Iowa Regional Airport	4.88	4.74	4.25	3.21	2.73	4.58	4.44	4.38
The Eastern Iowa Airport	3.95	4.16	3.97	3.38	3.47	3.73	3.71	3.33
Des Moines International Airport	3.75	3.81	3.71	3.54	3.78	3.84	3.48	3.36
Dubuque Regional Airport	4.28	4.88	4.81	3.80	2.82	4.10	4.64	4.38
Fort Dodge Regional Airport	4.88	4.83	4.54	3.64	3.92	4.70	4.50	4.54
Mason City Municipal Airport	4.96	4.88	4.81	4.00	3.82	4.63	4.58	4.70
Sioux Gateway Airport	4.90	4.53	3.89	3.00	2.50	4.33	4.21	3.84
Waterloo Regional Airport	4.23	4.39	3.94	4.29	3.50	4.24	4.11	3.94
IOWA AVERAGE	4.38	4.35	4.11	3.57	3.58	4.13	3.99	3.83

Source: 2006 Passenger Survey

There are a few points of interest related to the information shown in Tables 3-7 and 3-8. At the two larger commercial airports, departing passengers tended to give lower scores to their experiences with facilities/amenities than did passengers departing from the six smaller commercial airports. Des Moines International Airport did not score above 3.84 on any of their facilities/amenities, while The Eastern Iowa Regional had only one average score above 4. There is really no logical explanation for this scoring other than perhaps the travelers using the two larger commercial airports have higher expectations.



As shown in Table 3-8 for all of the eight commercial airports, the ticket counter and lobby area consistently ranked at the top. For most the smaller airports, their auto parking provided the departing customer with a good experience. For almost all of the airports, restaurant and bar ranked near the bottom of the passenger's list, as did experiences with gift and news.

Table 3-8
Ranking of Facilities/Amenities

Airport	Parking	Ticket Counter/Lobby	Security Experience	Restaurants/Bar	News & Gifts	Restrooms	Clarity and Usefulness of Signage	Departure Gate Area
Southeast Iowa Regional Airport	1	2	6	7	8	3	4	5
The Eastern Iowa Airport	3	1	2	7	6	4	5	8
Des Moines International Airport	4	2	5	6	3	1	7	8
Dubuque Regional Airport	5	1	2	7	8	6	3	4
Fort Dodge Regional Airport	1	2	4	8	7	3	6	5
Mason City Municipal Airport	1	2	3	7	8	5	6	4
Sioux Gateway Airport	1	2	5	7	8	3	4	6
Waterloo Regional Airport	4	1	6	2	8	3	5	7
IOWA AVERAGE RANKING	1	2	4	8	7	3	5	6

Source: 2006 Passenger Survey



Statewide Summary- Factors Influencing Airport Choice

Travelers participating in the departing passenger survey were asked to score 11 different factors in relationship to how these factors influence them when they are selecting a departure airport. A 1-5 scoring system was again used, with 5 signifying those factors considered to be important in the process and 1 those factors which are of least importance. **Table 3-9** summarizes and compares the results for the eight commercial airports in Iowa.

Table 3-9
Scoring of Factors Influencing Airport Selection

Airport	Reliability of Airline Service	Proximity of Airport to Work/Home	Frequency or Schedule of Flights	Nonstop Service to Desired Destination	Airline Fares	Faster, Easier Security Clearance	Frequent Flyer/Mileage Program	Choice of Airline	Cheaper or Free Parking	Aircraft Size	Passenger Terminal Amenities/Food/Baggage
Southeast Iowa Regional Airport	4.54	4.45	4.27	4.12	4.04	3.92	3.28	3.27	3.21	3.10	2.81
The Eastern Iowa Airport	4.50	3.80	3.64	4.04	4.21	2.99	3.18	3.38	2.29	3.09	3.11
Des Moines International Airport	4.42	3.70	3.48	4.29	4.09	2.88	2.91	3.36	2.39	3.42	3.41
Dubuque Regional Airport	4.71	4.21	4.13	3.83	4.50	3.79	3.50	2.71	4.00	2.92	3.21
Fort Dodge Regional Airport	4.35	4.58	4.22	3.59	4.02	3.73	3.38	3.48	3.75	3.26	3.18
Mason City Municipal Airport	4.54	4.55	4.14	3.70	4.48	3.91	3.66	3.42	3.82	3.07	3.07
Sioux Gateway Airport	4.64	3.78	4.14	3.96	3.82	3.38	3.86	3.41	3.18	3.32	3.36
Waterloo Regional Airport	4.41	4.29	3.18	3.41	4.29	2.82	3.00	3.07	3.12	3.41	3.12
IOWA AVERAGE	4.49	4.04	3.34	4.00	4.16	3.28	3.22	3.34	2.89	3.21	3.19
Source: 2006 Passenger Survey											



To better understand the implications of this information, **Table 3-10** was created to show the relative ranking for each of the eleven factors at each of the airports. As can be seen from this summary information, for the departing passengers who participated in this study's survey, reliability of airline service is the most important factor. Surprisingly, according to the passengers who completed surveys, fares were never ranked number one in their decision making process. Fares, however, usually ranked number two or number three and always ranked among the top five factors. Proximity of the airport to the traveler's home or business and frequency or schedule flights were also important, according to survey results. Whether the service available was nonstop or connecting also was important to some survey respondents. For some of the smaller commercial airports, faster security clearance and free parking were important in the traveler's decision making process. Overall for most respondents, choice of airline, frequent flyer programs, the passenger terminal and its amenities, and the size of the aircraft used to provide service did not have as much impact in the process to select a departure airport for airline travel.

Table 3-10
Ranking of Factors Influencing Airport Selection

Airport	Reliability of Airline Service	Proximity of Airport to Work/Home	Frequency or Schedule of Flights	Nonstop Service to Desired Destination	Airline Fares	Faster, Easier Security Clearance	Frequent Flyer/Mileage Program	Choice of Airline	Cheaper or Free Parking	Aircraft Size	Passenger Terminal Amenities/Food/Baggage
Southeast Iowa Regional Airport	1	2	3	4	5	6	7	8	9	10	11
The Eastern Iowa Airport	1	4	5	3	2	10	7	6	11	9	8
Des Moines International Airport	1	4	5	2	3	10	9	8	11	6	7
Dubuque Regional Airport	1	3	4	6	2	7	8	11	5	10	9
Fort Dodge Regional Airport	2	1	3	7	4	6	9	8	5	10	11
Mason City Municipal Airport	2	1	4	7	3	5	8	9	6	11	10
Sioux Gateway Airport	1	6	2	3	5	8	4	7	11	10	9
Waterloo Regional Airport	1	3	6	5	2	11	10	9	7	4	8
IOWA AVERAGE RANKING	1	3	5	4	2	7	8	6	11	9	10
Source: 2006 Passenger Survey											

This study's business survey also sought information from respondents on the importance of these same factors as they relate to selecting a departure airport. According to those who responded to the business survey, reliability of service and fares are at the top of their list, followed by frequency of service and/or schedule. The results of the passenger and business surveys produced similar results in terms of those factors that most influence the decisions of airline travelers in Iowa.



Statewide Summary- Impact of Fares

Passengers and business were asked to provide an estimate of the savings they need to realize on a round trip ticket before they will consider driving to another airport to start their airline travel. **Table 3-11** provides a summary of this information for the commercial airports in Iowa. According to responses from the passenger survey, on average, if passengers in the Mason City Municipal Airport market area can save approximately \$108 per round trip ticket, they will consider driving to another airport to realize this savings. For The Eastern Iowa Airport market area, the price break was identified as being \$177 per round trip ticket. All other airports ranged in between. On average, passengers participating in the survey indicate that if they can save approximately \$152 on their round trip, they will drive to another airport. Results from the business survey indicated that business travelers need to save approximately \$180 per round trip before they will consider driving to a more distant airport to start their air travel.

Table 3-11
Reported Minimum Fare Savings and Maximum Driving Times
That Would Cause a Passenger to Drive to an Alternate Airport to Begin Travel

Airport	Minimum fare savings that would cause a passenger to drive to alternate airport to begin trip	Maximum time that a passenger would be willing to drive to alternate airport to begin trip
Southeast Iowa Regional Airport	\$157	100 minutes
The Eastern Iowa Airport	\$177	100 minutes
Des Moines International Airport	\$157	100 minutes
Dubuque Regional Airport	\$119	135 minutes
Fort Dodge Regional Airport	\$151	120 minutes
Mason City Municipal Airport	\$108	120 minutes
Sioux Gateway Airport	\$176	85 minutes
Waterloo Regional Airport	\$150	80 minutes
IOWA STATEWIDE AVERAGE	\$152	110 minutes

Source: 2006 Passenger Survey

The survey indicated that passengers are willing to drive an average of 80 minutes to save money if they are in the Waterloo Regional Airport market area, and at least 120 minutes if they are in the Dubuque Regional Airport, Fort Dodge Regional Airport, or Mason City Municipal Airport market areas. On average, the passengers participating in the survey indicated they will drive 90 minutes to achieve a savings on their fare. Those responding to the business survey indicated they are willing to drive 120 minutes, on average, if they can save at least \$180 on their round trip ticket.



Statewide Summary- Fare Sensitivity

Those participating in the passenger and business surveys were asked to note how often they check fares from alternate airports when they are booking an airline ticket. Results from the passenger survey are summarized in **Table 3-12**. As can be seen from this information, passengers completing the surveys at the six smaller airports in Iowa have a higher propensity to check fares than do the passengers associated with the Des Moines International Airport and The Eastern Iowa Airport market areas. Ninety-five percent of the businesses that provided information for this same question report they check fares when scheduling their airline travel. Responding businesses report that they “always” check fares 56 percent of the time and “sometimes” check fares the remaining 39 percent of the time. Only five percent of the responding businesses report they do not check fares when planning an airline trip.

Table 3-12
Reported Frequency of Checking Airline Fares

Airport	Always	Sometimes	Never
Southeast Iowa Regional Airport	41%	39%	20%
The Eastern Iowa Airport	10%	40%	50%
Des Moines International Airport	16%	37%	47%
Dubuque Regional Airport	63%	21%	17%
Fort Dodge Regional Airport	45%	35%	20%
Mason City Municipal Airport	55%	32%	13%
Sioux Gateway Airport	63%	37%	0%
Waterloo Regional Airport	42%	37%	21%
IOWA AVERAGE	31%	36%	33%
Source: 2006 Passenger Survey			

The remainder of this chapter presents more detailed results from this study’s business and passenger surveys.



BUSINESS SURVEY RESULTS

According to the passenger survey results, 51 percent of travelers beginning airline trips at commercial service airports in Iowa travel for business purposes. A separate business survey was sent to the largest employers in the State to get a better understanding of business air travel patterns. Twenty-one businesses in Iowa participated in this survey. Combined, these businesses account for 37,000 employees and have an annual travel budget exceeding \$52 million. A summary of Iowa business survey responses follows.

Business Types

Each of the businesses responding to the business survey was asked to list the category that best described their service line or activity. Of the survey participants, 60 percent listed themselves as being manufacturing businesses, while 36 percent provide financial related services. The remaining four percent of the respondents were distributed among several other business categories.

Annual Travel Volumes

Only one business that participated in the business survey indicated they do not rely on or use commercial airline service on a regular basis to support their activities. Information collected indicates these businesses average one annual airline trip per person employed in Iowa. This volume of estimated business was used in the next step in this study to help estimate Iowa's total unconstrained demand for commercial airline travel.

Travel Budgets and Travel Locations

Iowa businesses responding to the business survey collectively indicate their annual travel budgets exceed \$52 million or \$2.4 million individually, on average. When this amount is compared to the number of reported airline trips, it is clear this amount includes costs other than just airline tickets. This amount most likely includes total costs for travel including airline tickets, hotels, meals, ground transportation and other travel related costs.

As would be expected, Iowa businesses responding to this study's business survey report the preponderance of airline travel is to domestic locations. When all respondents are considered, over 95 percent of all reported commercial airline travel is to destinations in the U.S. On average, the remaining five percent of airline trips are to international destinations. It is worth noting that a few businesses report as much as 15 to 20 percent international travel, but this is rare. A review of travel destinations, both domestic and international, by responding business did not show any consistent travel patterns.

Method of Ticket Purchase

Not many years ago, travel agents accounted for 90 percent or more of all airline tickets sold. Online travel booking sites combined with efforts of the airlines to cut their costs by eliminating travel agent commissions, have changed ticket purchase patterns. Persons traveling for personal reasons or for vacation travel tend to rely heavily on purchases through airline and Internet travel sites. These sites allow travelers to compare fares and itineraries for themselves.



According to Iowa businesses, however, over 36 percent of the businesses participating in this study's business survey use in-house corporate booking agents and an additional 32 percent utilize travel agents to make their air travel arrangements. While a fair percentage of the responding businesses indicated they purchase their airline tickets through an airline website, a much smaller percent of the responding businesses indicated they call the airlines directly for tickets. Businesses in Iowa report that a very small percentage of their commercial airline travel is booked through one of the Internet travel sites, such as Travelocity, Priceline, or Orbitz. Overall, 96 percent of all the tickets purchased were via a corporate travel account or independent travel agent.

This finding concerning ticket purchased by Iowa business has two important implications. In the past few years, Market Information Data Tapes (MIDT) have become available. These tapes provide a type of "data mining" as it relates to airline travel. MIDT provides information on airline traveler itineraries for the zip code in which the traveler's ticket is purchased. One of the major shortcomings for MIDT as it relates to commercial air service and market assessments is that tickets purchased online on any Internet site or tickets purchased directly from the airlines are not reflected in the MIDT data. Since most of the businesses in Iowa still rely on in-house travel coordinators or on travel agents, their travel would be reflected in MIDT files. While securing and analyzing MIDT information for the commercial service airports in Iowa is not part of the scope of this study, this finding, related to ticket purchase patterns, indicates that subsequent purchase of such information could be enlightening. MIDT data reflects not only the travel patterns of those traveling for business but also those traveling for leisure and booking through a travel agent.

Selection of Departure Airport

Information supplied by the commercial airports in Iowa, and confirmed by this study's survey efforts, shows a considerable amount of demand associated with the Iowa in now served by commercial airports in other states. In some instances, one of the Border Airports may actually be closest to the Iowa traveler. In other instances, Iowa associated air travel demand is bypassing a commercial airport in Iowa to use an airport in another state. In this study, these travelers will be considered passenger leakage. While specific passenger leakage for each airport and each county in Iowa is documented in subsequent chapters of this report, the business survey sought information on use of commercial airports in Iowa versus commercial airports in other states.

Burlington - Southeast Iowa Regional Airport (BRL)

For the Southeast Iowa Regional Airport market area, businesses report a notable percentage of their commercial airline travel starts at an airport in another state. Responding businesses from the Southeast Iowa Regional Airport market area indicate approximately 22 percent of their commercial airline trips start at a commercial airport in Iowa. The remaining trips reportedly start at a commercial airport in another state.

Cedar Rapids - The Eastern Iowa Airport (CID)

Information obtained from businesses in The Eastern Iowa Airport market area provides conflicting results. There were only two businesses in the area that completed the survey, therefore data may be skewed. While one business in this market area report they use a commercial airport in Iowa for 100 percent of their commercial airline trips, the other businesses report only 30 percent of their commercial airline travel originates at a commercial airport in Iowa. On average, businesses in The Eastern Iowa Airport market area are using an Iowa airport for about 65 percent of their commercial



airline trips. Based on other study surveys and analysis, this percent of usage of a commercial airport in Iowa for this market area seems understated. Use of commercial airports in Iowa by businesses in The Eastern Iowa Airport market area most likely is in excess of the 65 percent reflected in the business survey.

Des Moines - Des Moines International Airport (DSM)

Responding businesses located in the Des Moines International Airport market area indicate that 91 percent of all of their commercial airline trips originate at a commercial airport in Iowa. The remaining nine percent start at a commercial airport located in another state. Other efforts completed as part of this study substantiate this type of out of state airport usage for this market, even though Des Moines International Airport has Iowa's highest volume of commercial airline service.

Dubuque - Dubuque Regional Airport (DBQ)

Even with other airport choices, the businesses responding from the Dubuque Regional Airport market area indicate that a significant percent of their travel originates at a commercial airport in Iowa. Responding businesses from the Dubuque Regional Airport market area indicated that about 92 percent of all of their commercial airline trips start at a commercial airport located in Iowa. The remaining eight percent reportedly start at a commercial airport in another state.

Fort Dodge - Fort Dodge Regional Airport (FOD)

A limited response was obtained from businesses in the Fort Dodge Regional Airport market area. From the response that was provided, business support for air travel from commercial airports in Iowa is high. Response from this market area indicates that businesses use an airport in Iowa for 95 percent of their trips.

Mason City - Mason City Municipal Airport (MCW)

For the Mason City Municipal Airport market area, businesses who replied from this market area indicate that they start airline travel from a commercial airport in Iowa about 56 percent of the time. The remaining 44 percent of their commercial airline travel is initiated from an airport in another state. This finding is not surprising given the relative proximity of other commercial airports in Minnesota to this airport's market area.

Sioux City - Sioux Gateway Airport (SUX)

Businesses that listed the commercial airport serving Sioux City as being closest to them indicate that they begin about 20 percent of their commercial airline trips from a commercial airport in Iowa; the other 80 percent of their trips begin from a commercial airport outside the State. This result is not surprising since businesses and passengers in this part of Iowa have commercial air service options in both South Dakota and Nebraska. The business survey for Sioux Gateway was conducted prior to Frontier's entrance into the market.



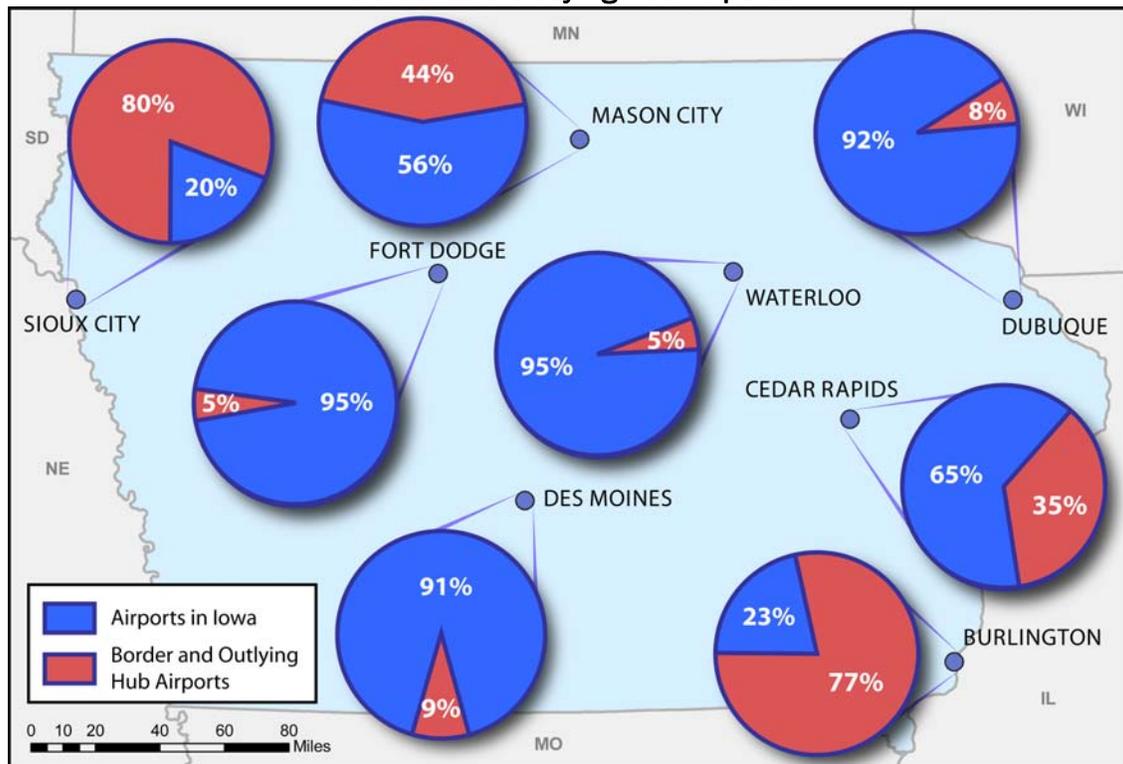
Waterloo - Waterloo Regional Airport (ALO)

Businesses in the Waterloo Regional Airport market area indicate that they start airline travel 95 percent of the time from a commercial airport in Iowa and five percent of the time from a commercial airport in another state.

Statewide Summary

Exhibit 3-1 portrays responses from the business survey on use of commercial airports in Iowa. Business travelers have a higher likelihood of choosing the closest or local airport to start their airline travel than do passengers who are traveling on personal or vacation related trips. Business travelers tend to be more time sensitive than they are fare sensitive. A general assumption can be made that travel related to business in Iowa has a higher propensity to be served at one of the commercial service airports in Iowa. Higher rates of usage of Border Airports and Outlying Hub Airports for those traveling on personal and vacation related trips are very likely, assuming these travelers are highly fare sensitive.

**Exhibit 3-1
Percentage of Business-Related Flights Beginning at Iowa and
Border and Outlying Hub Airports**



Source: 2006 Business Survey



Airport Selection Factors

When airline travelers select a departure airport, either within Iowa or in another state, there are a variety of factors they consider in making that selection. Intuitively, some of these factors are more important than others in the decision making process. Iowa businesses were asked to consider eleven factors and to rate their relative importance in terms of how they influence their selection of a departure airport for commercial airline travel. Responses from this ranking process are summarized in **Table 3-13**.

Table 3-13
Factors Influencing Airport Selection
by Iowa Business Travelers
(Rated 1 (not important) to 5 (very important))

Rank	Factors Influencing Choice	Average Importance
1 (tie)	Fares	4.51
1 (tie)	Reliability of Service	4.51
3	Frequency of Flights	4.22
4	Proximity of Airport to Work	3.57
5	Non-Stop Service	3.38
6	Aircraft Size	3.28
7	Faster Security	3.00
8	Terminal Amenities	3.07
9	Choice of Airlines	3.01
10	Frequent Flyer Loyalty	2.93
11	Lower Parking Cost	2.86
Source: 2006 Business Survey		

From the survey results summarized in Table 3-13, it can be seen that the two most important factors that influence which airports Iowa businesses use for their departures are airline fares and reliability of the service provided at the respective airport. These are the same factors that were ranked as being most important by passengers participating in this study's passenger survey.

Historically, rewards from frequent flyer programs have been a major factor in maintaining customer loyalty for many airlines, especially among business travelers. Results from this business survey, however, reveal that in Iowa, frequent flyer programs play a small role in attracting business customers when they select an airport for their departure. This type of information is useful to individual airport action plans that will be developed at the conclusion of this study.

Other factors that are notable in terms of their importance when it comes time to select a departure airport are proximity of the departure airport to work. Another factor with a consistently high rating was frequency of flights or the airport's overall schedule and the proximity of an airport to work. One business also noted that avoiding connections through Chicago-O'Hare was very important to their decision making process.

Factors which had a lower ranking in terms of their ability to influence which airports are chosen by Iowa businesses include choice of airline, shorter security wait times, the cost of auto parking, the size and type of aircraft providing the service, and amenities available to the traveler in the terminal building. When it comes to attracting passengers, there are many factors that are beyond the control



of each airport. Most of the top factors listed in Table 3-13 are not within the airport's control including airfares, reliability, and airline schedules. The three factors that are most controllable from the airport's standpoint are efficiency at security check points, amenities provided in the terminal building, and the cost of auto parking. As noted, all three of these factors rank low with Iowa's business travelers when they select an airport for their departure. This finding will be important to consider as individual airport action plans are formulated at the conclusion of this study.

Fare Sensitivity

Fares play a significant role when a business traveler chooses an airport for their departure. Businesses were asked to estimate the additional cost per ticket that would cause them to decide to drive from the market area of their local airport to a more distant airport to start their commercial airline trip. From the answers provided to this question, if a business can save \$180 or more on a round trip ticket, they will consider driving to a more distant airport, either within or beyond Iowa, to start their commercial airline trip. Survey responses indicate that Iowa business travelers will routinely drive 120 miles or approximately two hours to save \$180 or more on their airline ticket.

Survey responses indicate that 94 percent of the businesses typically check fares at alternate airports first when planning a trip. Only six percent of the responding businesses indicated that fares are not an issue for them.

Business surveys were used to gather information on if and how Iowa businesses might be willing to help in follow-on efforts to improve commercial airline service at Iowa airports. Among the responding businesses, 5 percent indicated they would consider helping by contributing to subsidies to attract new or improved airline service. An additional 5 percent indicated they would be willing to provide in-kind services, such as advertising, to help improve commercial air service. Twenty-six (26) percent of the responding businesses indicated that they would be willing to purchase tickets in advance to help support new or start up air service; this type of support is usually referred to as a seat guarantee or travel bank. The majority of the responding businesses, 64 percent, indicated that they would not be willing to provide any type of support, financial or otherwise, to secure commercial air service improvements for the commercial airports in Iowa.

Importance of Commercial Airports to Iowa Business Locations

Of the Iowa businesses who participated in the business survey, 100 percent indicated that being within close proximity to a commercial service airport is important, if not critical, to their business operations.



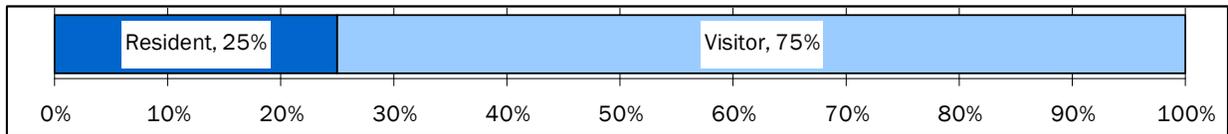
AIRPORT SPECIFIC PASSENGER SURVEY RESULTS

The remaining portions of this chapter provide a summary of passenger survey results for the eight commercial airports in Iowa as well as for the Quad City Airport in Moline.

Burlington– Southeast Iowa Regional Airport (BRL) Passenger Survey Results

1. Please indicate whether you are a resident, visitor, or connecting passenger:

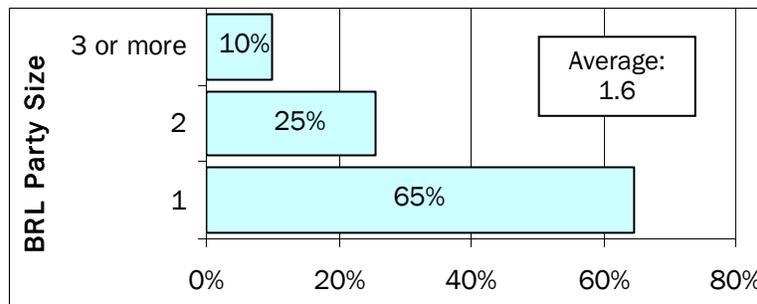
**Exhibit 3-2
Resident versus Visitor Split
Southeast Iowa Regional Airport**



Source: 2006 Passenger Survey

2. How many people are in your travel party today?

**Exhibit 3-3
Travel Party Size
Southeast Iowa Regional Airport**

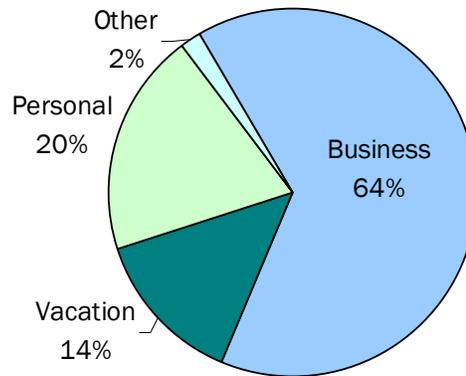


Source: 2006 Passenger Survey



3. What was the purpose of your trip?

**Exhibit 3-4
Trip Purpose
Southeast Iowa Regional Airport**

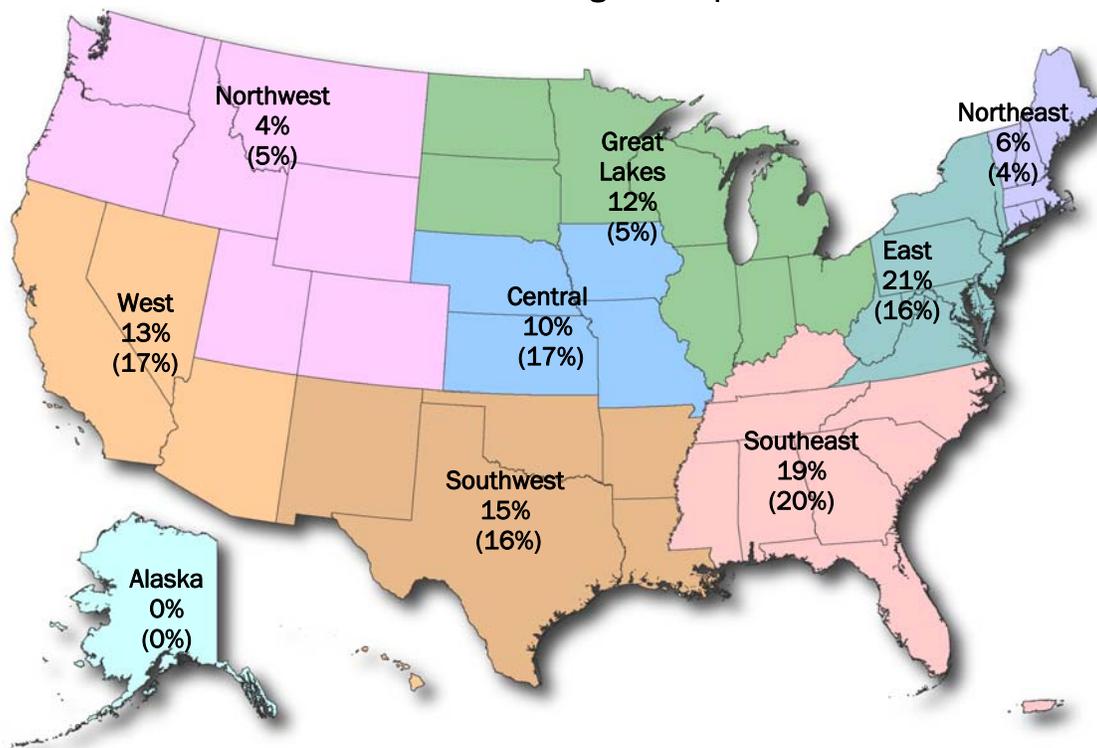


Source: 2006 Passenger Survey

4. In what state is your final destination for today's trip?

Information on travel patterns was requested as part of this survey to ensure the validity of the survey results. Travel patterns identified by survey respondents, while somewhat different, are comparable to travel patterns reflected in US DOT data. This finding helps to ensure the validity of the survey sample. **Exhibit 3-5** reflects the final destination regions reported by passengers departing Southeast Iowa Regional Airport. Individually, locations in New York and Texas tied for the most common destinations with each having a total of 13.5 percent. Regional travel patterns recorded as part of this study's passenger surveys were compared to regional travel patterns for the airport obtained from US DOT data for the airport. This information was previously presented in Chapter One. US DOT travel patterns represent a much longer period of time; this study's passenger survey results reflect travel patterns on the days the surveys were completed. As a result, some difference in the two results can be expected and are shown in Exhibit 3-5 for comparison.

Exhibit 3-5
Reported Final Destination Regions for Passengers
Southeast Iowa Regional Airport



Sources: 2006 Passenger Survey; () = Regional Travel as Reported by US DOT

5. What airline are you flying today?

Regions Air (operating as American Eagle) is the only carrier currently serving Southeast Iowa Regional Airport.

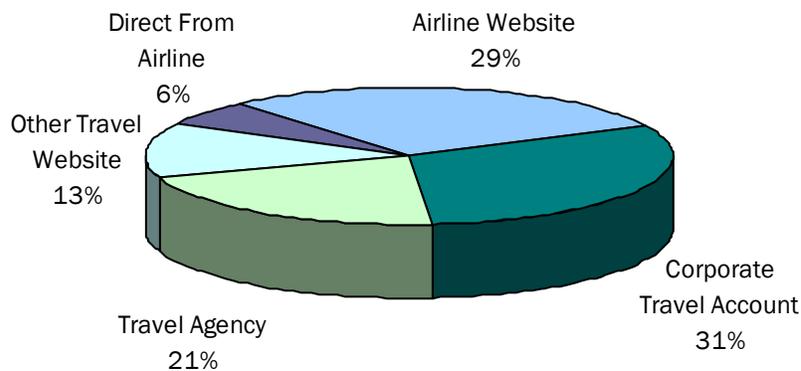


6. What is the number one reason you chose this flight today?

This question was only asked during the in person interviews and was not asked on the survey handouts. As a result of limited survey returns, meaningful conclusions for Southeast Iowa Regional Airport could not be developed for this question.

7. How was your ticket for today's trip purchased?

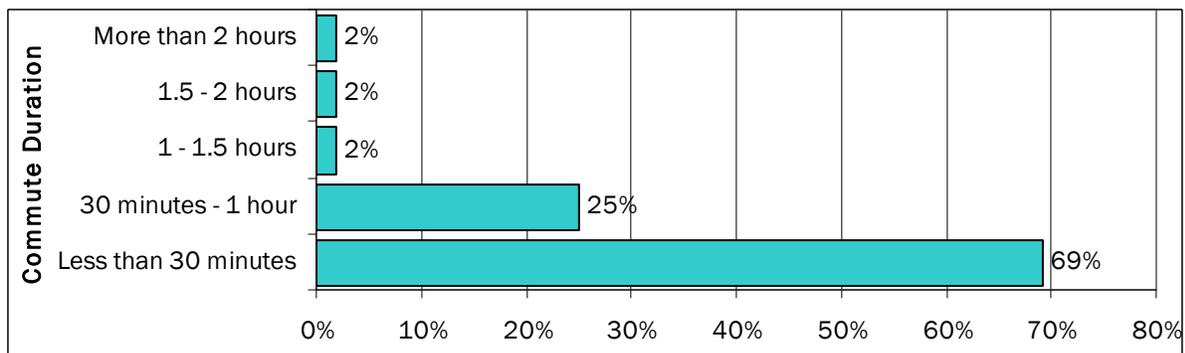
**Exhibit 3-6
Method of Ticket Purchase
Southeast Iowa Regional Airport**



Source: 2006 Passenger Survey

8. How long did your trip to the airport take?

**Exhibit 3-7
Travel Time to Airport
Southeast Iowa Regional Airport**



Source: 2006 Passenger Survey



9. On a scale of 1 to 5, with 1 being poor and 5 being excellent, how would you rate your overall experience with the following airport services and amenities?

**Table 3-14
Service and Amenities Ratings
Southeast Iowa Regional Airport**

Rank	Category	Average Rating
1	Parking	4.88
2	Ticket Counter/Lobby	4.74
3	Restrooms	4.58
4	Clarity and Usefulness of Signage	4.44
5	Departure Gate Area	4.38
6	Security Experience	4.25
7	Restaurants/Bar	3.21
8	News & Gifts	2.73

Source: 2006 Passenger Survey

10. On a scale of 1 to 5, with 1 being not important and 5 being very important, please indicate how important each of the following factors are when choosing a departure airport:

**Table 3-15
Importance of Factors When Choosing a Departure Airport
Southeast Iowa Regional Airport**

Rank	Category	Average Importance
1	Reliability of Airline Service	4.54
2	Proximity of Airport to Work/Home	4.45
3	Frequency or Schedule of Flights	4.27
4	Nonstop Service to Desired Destination	4.12
5	Airline Fares	4.04
6	Faster, Easier Security Clearance	3.92
7	Frequent Flyer/Mileage Program	3.28
8	Choice of Airline	3.27
9	Cheaper or Free Parking	3.21
10	Aircraft Size	3.10
11	Passenger Terminal Amenities/Food/Baggage	2.81

Source: 2006 Passenger Survey



11. Please help us to understand your sensitivity to airline fares:

a. What is the minimum difference in round trip airfares that will cause you to drive to an alternate airport to begin the air portion of your trip?

Table 3-16
Minimum Round Trip Airfare Savings That will Cause Passengers to Drive to Alternate Airport
Southeast Iowa Regional Airport

Minimum Fare Savings	% of Respondents
<\$100	10%
\$100-\$199	68%
\$200-\$299	13%
>\$300	10%
Average- All Respondents	\$157
Source: 2006 Passenger Survey	

b. Is there a maximum drive time that you are willing to drive to an alternate airport to begin the air portion of your trip?

Table 3-17
Maximum Drive Time Passengers are Willing to Drive to Use Alternate Airport
Southeast Iowa Regional Airport

Maximum Driving Time	% of Respondents
<60 min	16%
60 min-119 min	37%
120 min- 179 min	30%
>180 min	16%
Average- All Respondents	99 minutes
Source: 2006 Passenger Survey	

c. Do you check the price differences from this airport versus the alternate airport before making your purchase decision?

Table 3-18
How Often Passengers Noted that They Check Prices from Alternate Airports
Southeast Iowa Regional Airport

Frequency	% of Respondents
Always	41%
Sometimes	39%
Never	20%
Source: 2006 Passenger Survey	



12. Please estimate the total number of airline trips that all members of your household took in the last 12 months:

The number of reported trips by household for Southeast Iowa Regional Airport helps to establish a relative propensity of a region to use airline travel.

Table 3-19
Average Annual Airline Trips per Household
Southeast Iowa Regional Airport

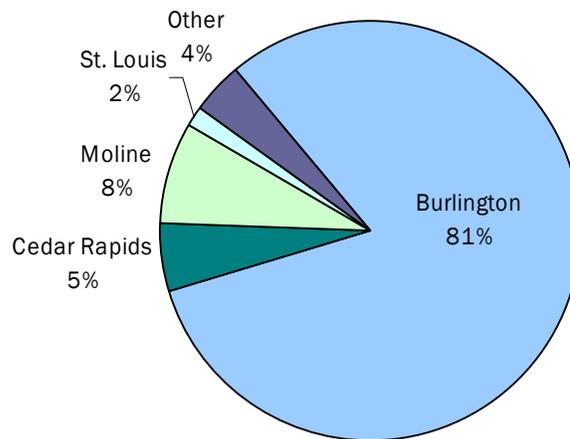
Category	Number of Airline Trips per Household
Business	8.8
Leisure/Personal	2.8
Total	11.6

Source: 2006 Passenger Survey

13. When you took an airline trip, what percentage of your trips were from this airport as opposed to another commercial airport?

Responses to this question greatly favored Southeast Iowa Regional Airport (see **Exhibit 3-8**), with passengers reporting that 81 percent of their air travel originates at this airport. This indicates that passengers participating in the survey that use Southeast Iowa Regional Airport are often repeat customers and/or favor using the local airport for its convenience.

Exhibit 3-8
Percentage of Flights Beginning at BRL and Other Airports
Southeast Iowa Regional Airport



Source: 2006 Passenger Survey



Passengers associated with the Southeast Iowa Regional Airport market area who always select another airport for their airline travel are not reflected in the study's passenger survey results for the Southeast Iowa Regional Airport. Passengers who did participate in the passenger survey are most likely those who have the highest propensity to use their "local" or most convenient airport. Therefore, it is within reason to expect that passenger responses to this question show significant (81 percent) usage of the local airport. In reality, as will be shown in the next chapter, many air travelers associated with this market area select other airports to begin their airline travel. Information from the passengers in the Southeast Iowa Regional Airport market area who routinely use another airport was not collected in this type of passenger intercept survey.

14. What could this airport do to improve your travel experience?

Many respondents to this question suggest that people flying out of Southeast Iowa Regional Airport are quite pleased with service at the airport. The most common suggestion was to have a restaurant or café at the airport, with a few travelers requesting flights to more destinations. General responses included the following:

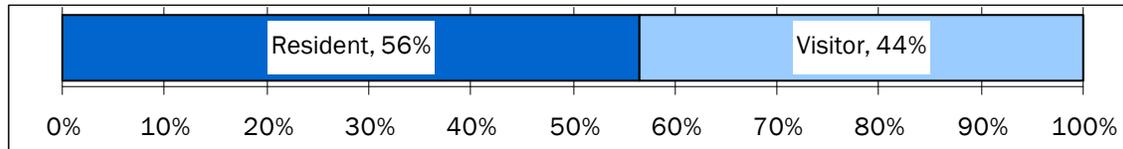
- Would like to see more direct flights
- Would like jet service
- Would like food service
- Would like bar service
- Should consider using a shuttle service to bring in folks from the Illinois side of the river to the airport
- Should shuttle people to Cedar Rapids if having equipment problems
- Flights often seemed to be delayed



Cedar Rapids – The Eastern Iowa Airport (CID) Passenger Survey Results

1. Please indicate whether you are a resident, visitor, or connecting passenger:

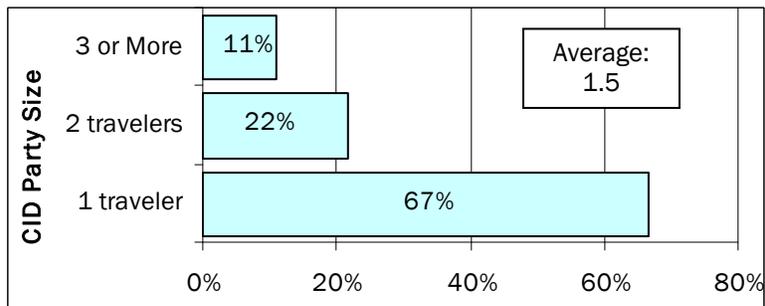
**Exhibit 3-9
Resident versus Visitor Split
The Eastern Iowa Airport**



Source: 2006 Passenger Survey

2. How many people are in your travel party today?

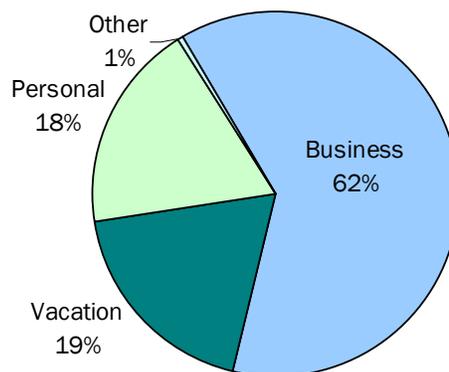
**Exhibit 3-10
Travel Party Size
The Eastern Iowa Airport**



Source: 2006 Passenger Survey

3. What was the purpose of your trip?

**Exhibit 3-11
Trip Purpose
The Eastern Iowa Airport**

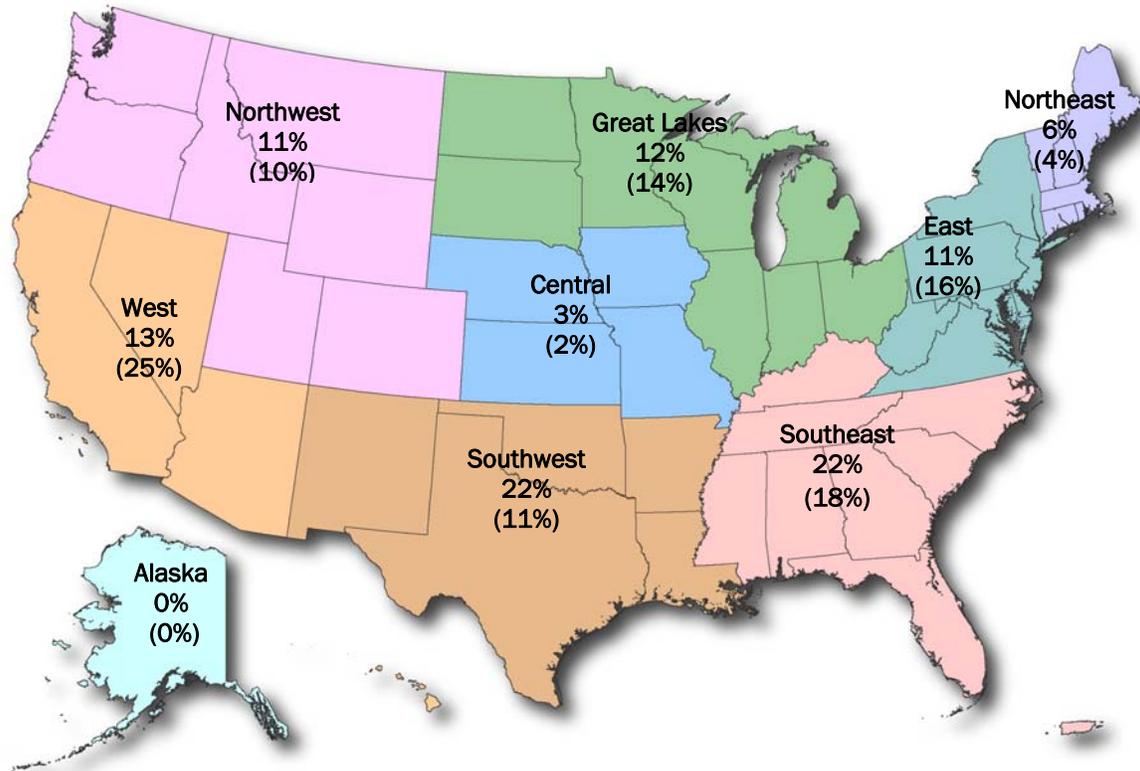


Source: 2006 Passenger Survey

4. In what state is your final destination for today's trip?

Information on travel patterns was requested as part of this survey to ensure the validity of the survey results. Travel patterns identified by survey respondents, while somewhat different, are comparable to travel patterns reflected in US DOT data. This finding helps to ensure the validity of the survey sample. **Exhibit 3-12** shows the final destinations by region for passengers from The Eastern Iowa Airport. Individually, locations in Florida and Texas were the most popular destinations, each with 10 percent of the total, followed by locations in California with 9 percent. Regional travel patterns recorded as part of this study's passenger surveys were compared to regional travel patterns for this airport obtained from US DOT data for the airport. This information was previously presented in Chapter One. US DOT travel patterns represent a much longer period of time; this study's passenger survey results reflect travel patterns on the days the surveys were completed. As a result, some difference in the two results can be expected.

Exhibit 3-12
Reported Final Destination Regions for Passengers
The Eastern Iowa Airport



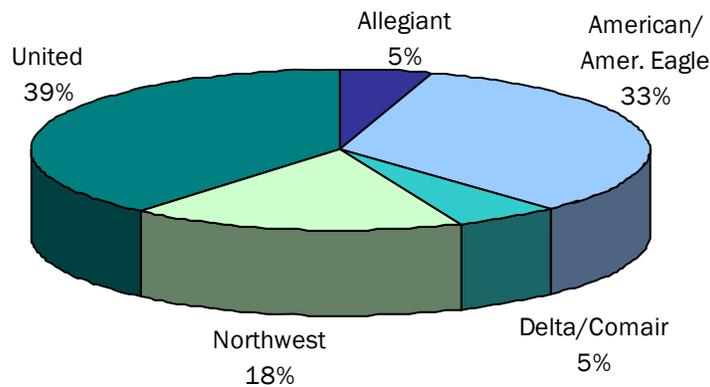
Sources: 2006 Passenger Survey; () = Regional Travel as Reported by US DOT



5. What airline are you flying today?

The Eastern Iowa Airport collects passenger data by airline from each carrier serving the airport. Responses to this question were gathered as part of the passenger survey to ensure an appropriate cross-section and sample of survey respondents.

**Exhibit 3-13
Air Carrier Usage
The Eastern Iowa Airport**



Source: 2006 Passenger Survey

6. What is the number one reason you chose this flight today?

**Table 3-20
Reasons for Choosing Flight
The Eastern Iowa Airport**

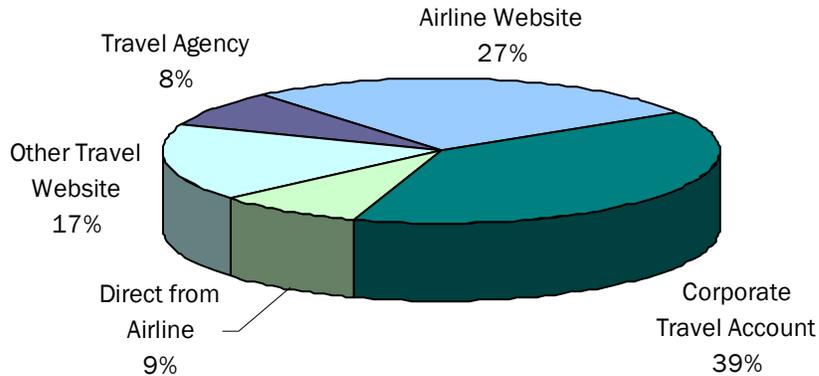
Reason	% of Respondents
Flight Schedule	33%
Air Fare	21%
Frequent Flyer Program	12%
Destination Offered	7%
Only Option Available	7%
Airport Location/Convenience	5%
Nonstop Flight	4%
Other	10%

Source: 2006 Passenger Survey



7. How was your ticket for today's trip purchased?

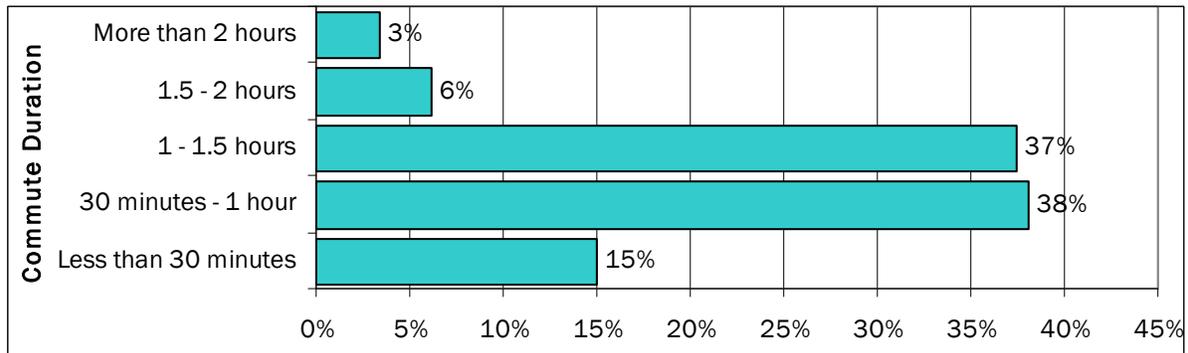
**Exhibit 3-14
Method of Ticket Purchase
The Eastern Iowa Airport**



Source: 2006 Passenger Survey

8. How long did your trip to the airport take?

**Exhibit 3-15
Travel Time to Airport
The Eastern Iowa Airport**



Source: 2006 Passenger Survey



9. On a scale of 1 to 5, with 1 being poor and 5 being excellent, how would you rate your overall experience with the following airport services and amenities?

Table 3-21
Service and Amenities Ratings at
The Eastern Iowa Airport

Rank	Category	Average Rating
1	Ticket Counter/Lobby	4.16
2	Security Experience	3.97
3	Parking	3.95
4	Restrooms	3.73
5	Clarity and Usefulness of Signage	3.71
6	News & Gifts	3.47
7	Restaurants/Bar	3.38
8	Departure Gate Area	3.33

Source: 2006 Passenger Survey

10. On a scale of 1 to 5, with 1 being not important and 5 being very important, please indicate how important each of the following factors are when choosing a departure airport:

Table 3-22
The Eastern Iowa Airport

Rank	Category	Average Importance
1	Reliability of Airline Service	4.50
2	Airline Fares	4.21
3	Nonstop Service to Desired Destination	4.04
4	Proximity of Airport to Work/Home	3.80
5	Frequency or Schedule of Flights	3.64
6	Choice of Airline	3.38
7	Frequent Flyer/Mileage Program	3.18
8	Passenger Terminal Amenities/Food/Baggage	3.11
9	Aircraft Size	3.09
10	Faster, Easier Security Clearance	2.99
11	Cheaper or Free Parking	2.29

Source: 2006 Passenger Survey



11. Please help us to understand your sensitivity to airline fares:

a. What is the minimum difference in round trip airfares that will cause you to drive to an alternate airport to begin the air portion of your trip?

Table 3-23
Minimum Round Trip Airfare Savings that will Cause Passengers to Drive to Alternate Airport
The Eastern Iowa Airport

Minimum Fare Savings	% of Respondents
<\$100	13%
\$100-\$199	44%
\$200-\$299	27%
>\$300	16%
Average- All Respondents	\$177
Source: 2006 Passenger Survey	

b. Is there a maximum drive time that you are willing to drive to an alternate airport to begin the air portion of your trip?

Table 3-24
Maximum Drive Time Passengers are willing to Drive to Use Alternate Airport
The Eastern Iowa Airport

Maximum Driving Time	% of Respondents
<60 min	5%
60 min-119 min	33%
120 min- 179 min	53%
>180 min	9%
Average- All Respondents	96 minutes
Source: 2006 Passenger Survey	

c. Do you check the price differences from this airport versus the alternate airport before making your purchase decision?

Table 3-25
How Often Passengers Noted that They Check Prices from Alternate Airports
The Eastern Iowa Airport

Frequency	% of Respondents
Always	10%
Sometimes	40%
Never	50%
Source: 2006 Passenger Survey	



12. Please estimate the total number of airline trips that all members of your household took in the last 12 months:

The number of reported trips by household for The Eastern Iowa Airport helps to establish a relative propensity of a region to use airline travel.

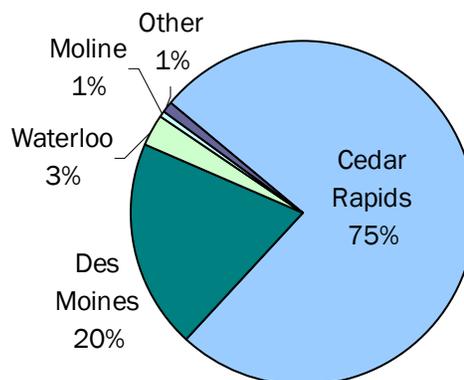
Table 3-26
Average Annual Airline Trips per Household
The Eastern Iowa Airport

Category	Number of Airline Trips per Household
Business	11.3
Leisure/Personal	2.2
Total	13.5
Source: 2006 Passenger Survey	

13. When you took an airline trip, what percentage of your trips in the last year were from this airport as opposed to another airport?

Responses to this question greatly favored The Eastern Iowa Airport in Cedar Rapids (**Exhibit 3-16**), with resident passengers reporting that 75 percent of their air travel begins at this airport. This indicates that passengers that use The Eastern Iowa Airport are often repeat customers and/or favor using the local airport for its convenience. Information from passengers who routinely select other airports for their departures are not reflected in these responses.

Exhibit 3-16
Percentage of Flights Beginning at CID and Other Airports
The Eastern Iowa Airport



Source: 2006 Passenger Survey



14. What could this airport do to improve your travel experience?

The most common suggestion for The Eastern Iowa Airport was to improve food service at the airport, either by offering more dining locations or by expanding the hours of operation to more effectively cater to early morning flyers. Suggested improvements for auto parking costs, proximity, and signage were also noted. Other responses included the following:

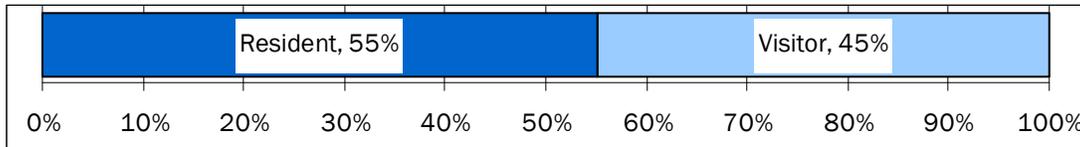
- Decrease the security check time
- Would like to see more direct flights
- Improve speed of wireless internet
- Would like jet service
- Would like to see a bookstore or more shops in the post security areas
- Flights often seemed to be delayed
- Would like a direct flight to Orlando
- Additional carriers
- Several comments, mostly from single female travelers and a few elderly people, that they would like valet parking
- Though parking was good overall, but a long walk from the back lot
- Thought food price was high for what was available (Approx. \$2.35 for a bag of M&Ms)
- Several liked the art on display



Des Moines – Des Moines International Airport (DSM) Passenger Survey Results

1. Please indicate whether you are a resident, visitor, or connecting passenger:

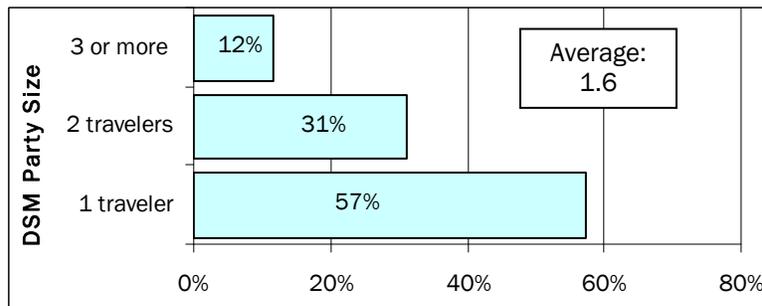
**Exhibit 3-17
Resident versus Visitor Split
Des Moines International Airport**



Source: 2006 Passenger Survey

2. How many people are in your travel party today?

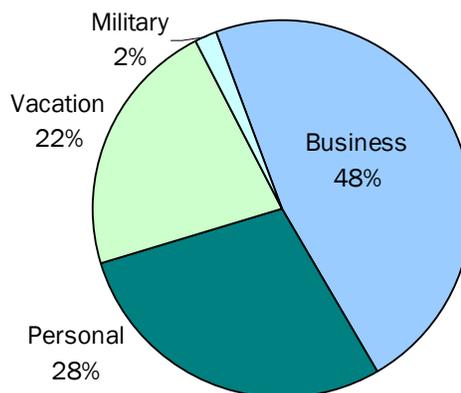
**Exhibit 3-18
Travel Party Size
Des Moines International Airport**



Source: 2006 Passenger Survey

3. What was the purpose of your trip?

**Exhibit 3-19
Trip Purpose
Des Moines International Airport**

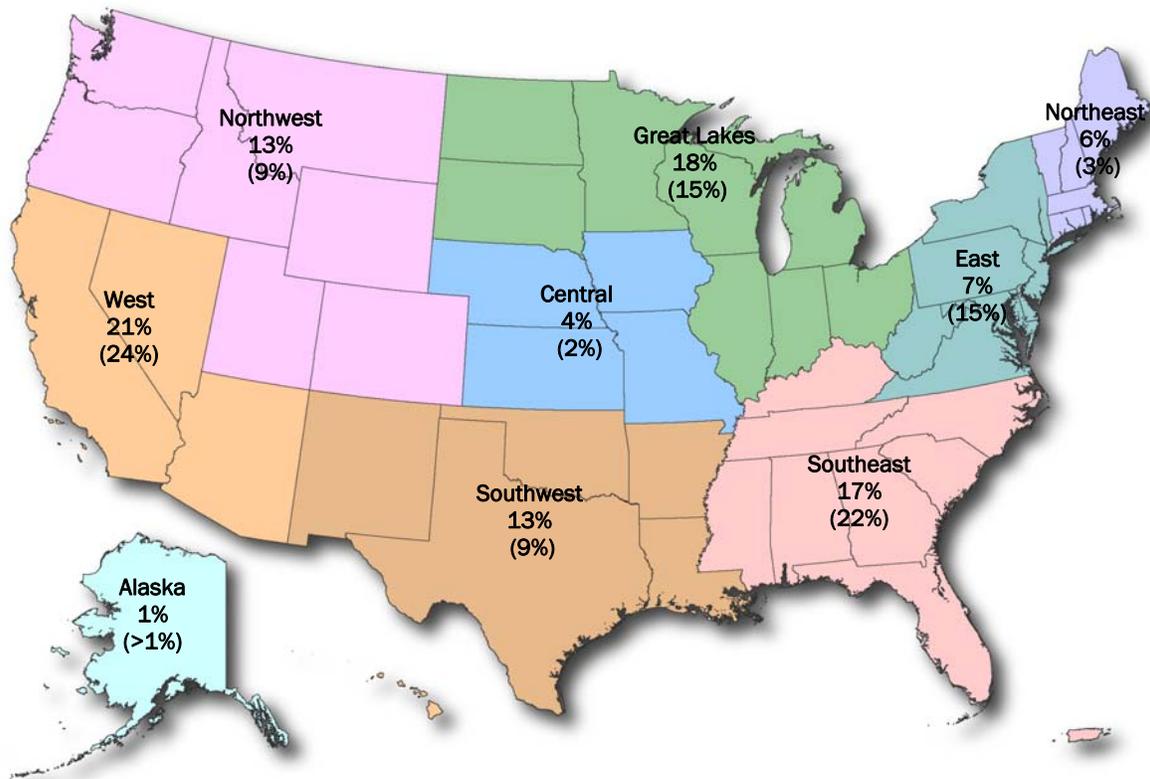


Source: 2006 Passenger Survey

4. In what state is your final destination for today's trip?

Information on travel patterns was requested as part of this survey to ensure the validity of the survey results. Travel patterns identified by survey respondents, while somewhat different, are comparable to travel patterns reflected in US DOT data. This finding helps to ensure the validity of the survey sample. **Exhibit 3-20** shows final destination regions for passengers leaving Des Moines International Airport. Individually, locations in Illinois and Texas are the most popular destinations, with 11 percent each. Regional travel patterns recorded as part of this study's passenger surveys were compared to regional travel patterns for the airport obtained from US DOT data for the airport. This information was previously presented in Chapter One. US DOT travel patterns represent a much longer period of time; this study's passenger survey results reflect travel patterns on the days the surveys were completed. As a result, some difference in the two results can be expected.

Exhibit 3-20
Reported Final Destination Regions for Passengers
Des Moines International Airport



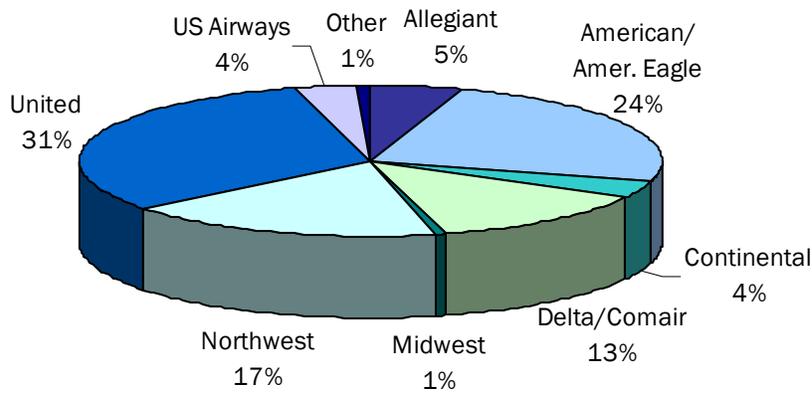
Sources: 2006 Passenger Survey; () = Regional Travel as Reported by US DOT



5. What airline are you flying today?

Des Moines International Airport collects passenger data by airline from each carrier serving the airport. Information from this question on the passenger survey was reviewed to ensure an appropriate cross-section and sample of survey respondents.

**Exhibit 3-21
Air Carrier Usage
Des Moines International Airport**



Source: 2006 Passenger Survey

6. What is the number one reason you chose this flight today?

**Table 3-27
Reasons for Choosing Flight
Des Moines International Airport**

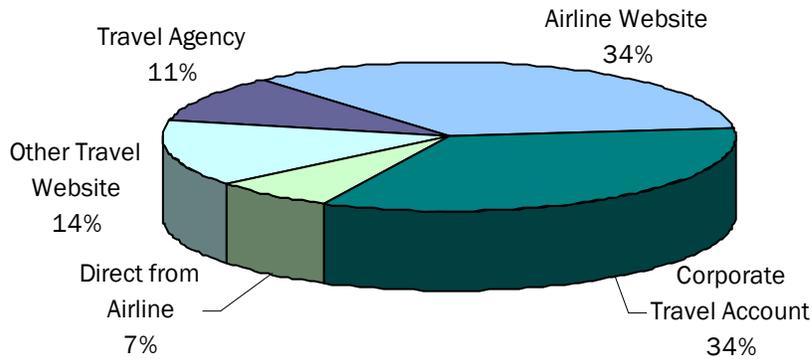
Reason	% of Respondents
Flight Schedule	30%
Air Fare	23%
Destination Offered	14%
Frequent Flyer Program	12%
Nonstop Flight	6%
Only Option Available	6%
Airport Location/Convenience	2%
Other	6%

Source: 2006 Passenger Survey



7. How was your ticket for today's trip purchased?

Exhibit 3-22
Method of Ticket Purchase
Des Moines International Airport

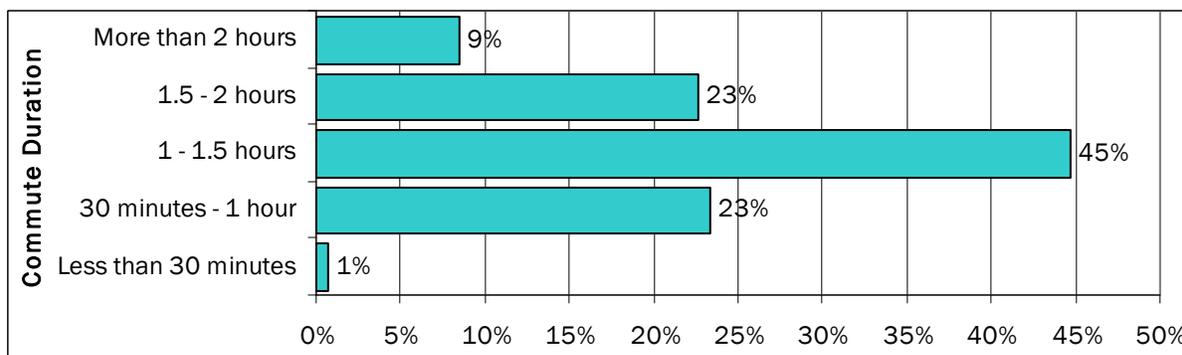


Source: 2006 Passenger Survey

8. How long did your trip to the airport take?

Given the high percentage of people and businesses located within a 30 minute drive of the Des Moines International Airport, the survey results presented in **Exhibit 3-23** may not be reflective what may be expected. These responses may have to do with the cross-section of people surveyed or the interpretation of the question to include the time it took for the passenger to reach the security checkpoint where surveys were administered. In these instances, the travel most likely not only considered their door-to-door drive time, but also the time it took them to park, unload, check in with their airline, and reach the security checkpoint. It is likely that a high percentage of the travelers who originate at the Des Moines International Airport experience a 30 minute or less actual door-to-door drive time.

Exhibit 3-23
Travel Time to Airport
Des Moines International Airport



Source: 2006 Passenger Survey



9. On a scale of 1 to 5, with 1 being poor and 5 being excellent, how would you rate your overall experience with the following airport services and amenities?

Table 3-28
Service and Amenities Ratings at
Des Moines International Airport

Rank	Category	Average Rating
1	Restrooms	3.84
2	Ticket Counter/Lobby	3.81
3	Parking	3.75
4	News & Gifts	3.78
5	Security Experience	3.71
6	Restaurants/Bar	3.54
7	Clarity and Usefulness of Signage	3.48
8	Departure Gate Area	3.36

Source: 2006 Passenger Survey

10. On a scale of 1 to 5, with 1 being not important and 5 being very important, please indicate how important each of the following factors are when choosing a departure airport:

Table 3-29
Importance of Factors When Choosing a Departure Airport
Des Moines International Airport

Rank	Category	Average Importance
1	Reliability of Airline Service	4.42
2	Nonstop Service to Desired Destination	4.29
3	Airline Fares	4.09
4	Proximity of Airport to Work/Home	3.70
5	Frequency or Schedule of Flights	3.48
6	Aircraft Size	3.42
7	Passenger Terminal Amenities/Food/Baggage	3.41
8	Choice of Airline	3.36
9	Frequent Flyer/Mileage Program	2.91
10	Faster, Easier Security Clearance	2.88
11	Cheaper or Free Parking	2.39

Source: 2006 Passenger Survey



11. Please help us to understand your sensitivity to airline fares:

a. What is the minimum difference in round trip airfares that will cause you to drive to an alternate airport to begin the air portion of your trip?

Table 3-30
Minimum Round Trip Airfare Savings that will Cause Passengers to Drive to Alternate Airport
Des Moines International Airport

Minimum Fare Savings	% of Respondents
<\$100	37%
\$100-\$199	11%
\$200-\$299	29%
>\$300	23%
Average- All Respondents	\$157
Source: 2006 Passenger Survey	

b. Is there a maximum drive time that you are willing to drive to an alternate airport to begin the air portion of your trip?

Table 3-31
Maximum Drive Time Passengers are willing to Drive to Use Alternate Airport
Des Moines International Airport

Maximum Driving Time	% of Respondents
<60 min	25%
60 min-119 min	9%
120 min- 179 min	47%
>180 min	19%
Average- All Respondents	99 minutes
Source: 2006 Passenger Survey	

c. Do you check the price differences from this airport versus the alternate airport before making your purchase decision?

Table 3-32
How Often Passengers Noted that They Check Prices from Alternate Airports
Des Moines International Airport

Frequency	% of Respondents
Always	16%
Sometimes	37%
Never	47%
Source: 2006 Passenger Survey	



12. Please estimate the total number of airline trips that all members of your household took in the last 12 months:

The number of reported trips by household for Des Moines International Airport helps to establish a relative propensity of a region to use airline travel.

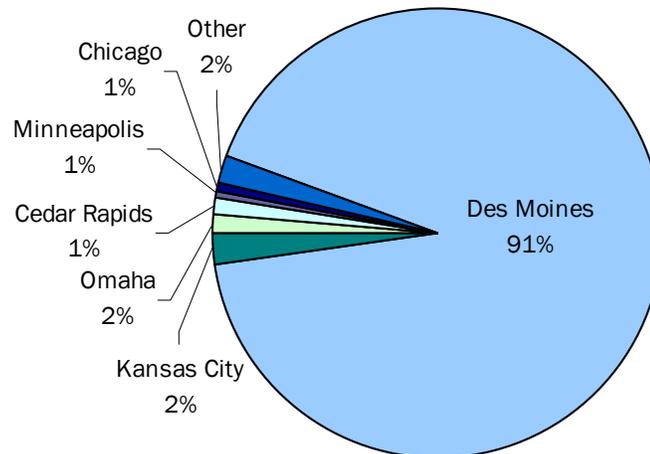
Table 3-33
Average Annual Airline Trips per Household
Des Moines International Airport

Category	Number of Airline Trips per Household
Business	6.1
Leisure/Personal	2.9
Total	9.0
Source: 2006 Passenger Survey	

13. When you took an airline trip, what percentage of your trips in the last year were from this airport as opposed to other airports?

Responses to this question heavily favored Des Moines International Airport (see **Exhibit 3-24**) with passengers reporting that 91 percent of their air travel originates at Des Moines International Airport. This indicates that passengers that use Des Moines International Airport are often repeat customers and/or favor using the local airport for its convenience and choice of service offerings.

Exhibit 3-24
Percentage of Annual Household Flights Beginning at DSM and Other Airports
Des Moines International Airport



Source: 2006 Passenger Survey



14. What could this airport do to improve your travel experience?

The most common suggestions to improve Des Moines International Airport were to offer more direct flights at lower fares. Some passengers were specific, saying the airport should attempt to be more price-competitive with Kansas City International Airport. Another common suggestion was to improve food service at the airport, either through offering more dining locations or by expanding the hours of operation in order to better cater to early morning flyers. Other responses included the following:

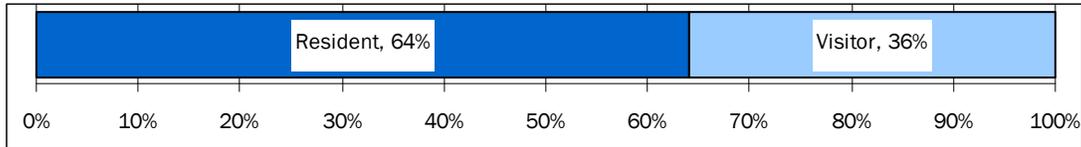
- Bookstore or more shops in the post security areas.
- Introduce free wireless internet service
- Improve the terminal areas for comfort and appearance
- Flights often seemed to be delayed
- More direct flights to destinations
- Had many comments about the troubles at Chicago-O'Hare causing problems for travel out of Des Moines International
- Would like more food options past security—though many also noted the construction of the restaurant as well
- Would like to see bigger jets (737s or 320s) used at Des Moines International Airport instead of some of the small RJs
- Felt that airline staff was not always available to answer questions when flights were delayed or canceled all together
- Liked the parking garage, but many said it was filled if there flight was in the middle of the day—didn't like parking in the satellite lot
- Some wanted to see updated furniture in the terminal
- More message boards with flight info on it near the gates



Dubuque– Dubuque Regional Airport (DBQ) Passenger Survey Results

1. Please indicate whether you are a resident, visitor, or connecting passenger:

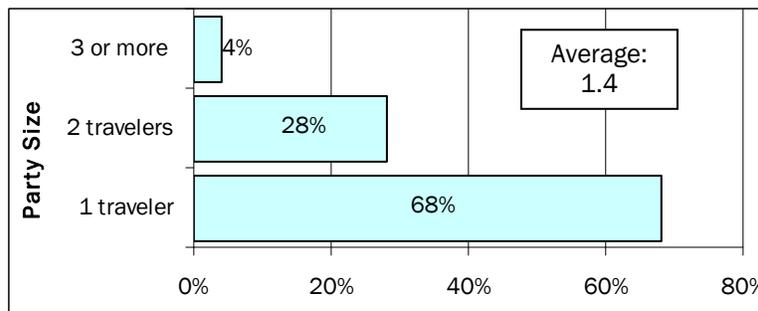
**Exhibit 3-25
Resident versus Visitor Split
Dubuque Regional Airport**



Source: 2006 Passenger Survey

2. How many people are in your travel party today?

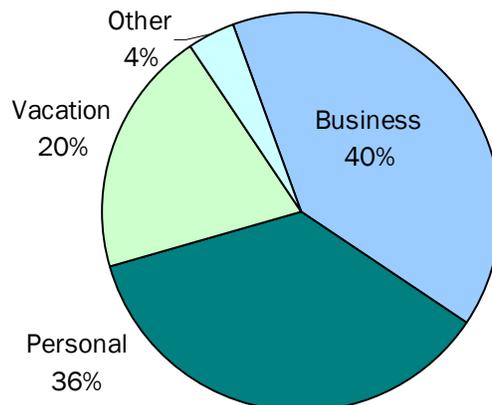
**Exhibit 3-26
Travel Party Size
Dubuque Regional Airport**



Source: 2006 Passenger Survey

3. What was the purpose of your trip?

**Exhibit 3-27
Trip Purpose
Dubuque Regional Airport**

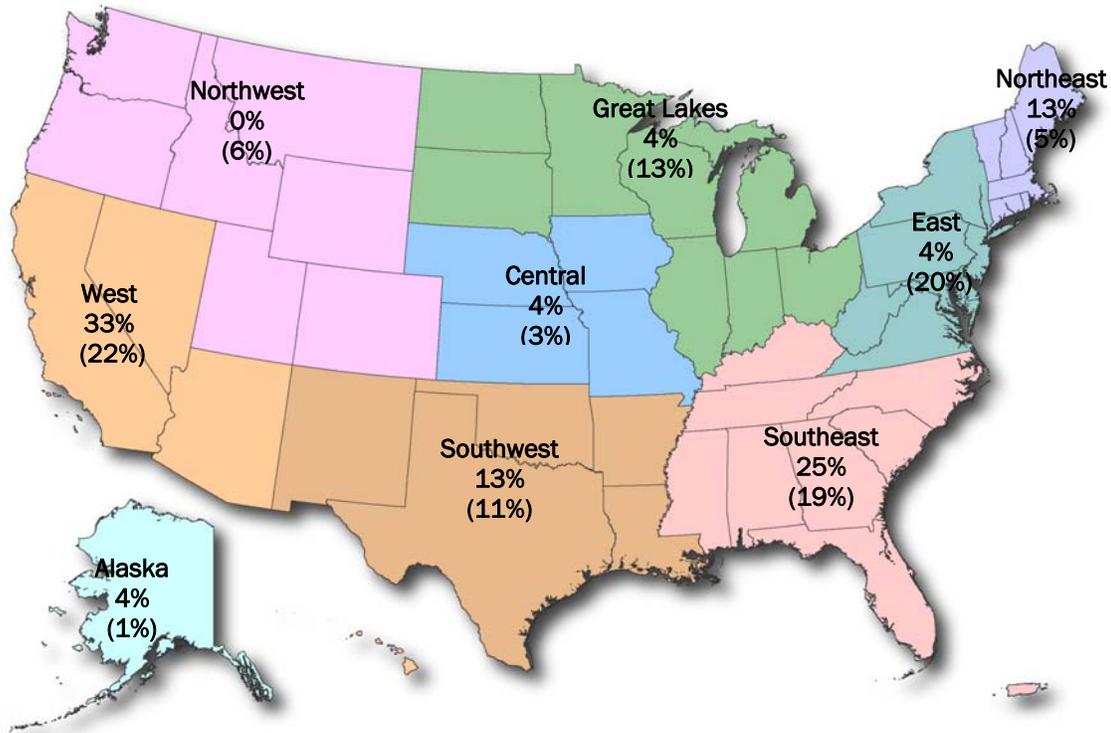


Source: 2006 Passenger Survey

4. In what state is your final destination for today's trip?

Information on travel patterns was requested as part of this survey to ensure the validity of the survey results. Travel patterns identified by survey respondents, while somewhat different, are comparable to travel patterns reflected in US DOT data. This finding helps to ensure the validity of the survey sample. **Exhibit 3-28** shows final destination regions for passengers originating from Dubuque Regional. Locations in California was the most common destination, capturing 21 percent of reported trips, followed by locations in North Carolina, Massachusetts, and Arizona, each having 13 percent. Regional travel patterns recorded as part of this study's passenger surveys were compared to regional travel patterns for the airport obtained from US DOT data for the airport. This information was previously presented in Chapter One. US DOT travel patterns represent a much longer period of time; this study's passenger survey results reflect travel patterns only on the days the surveys were completed. As a result, some difference in the two results can be expected.

Exhibit 3-28
Reported Final Destination Regions for Passengers
Dubuque Regional Airport



Sources: 2006 Passenger Survey; () = Regional Travel as reported by US DOT



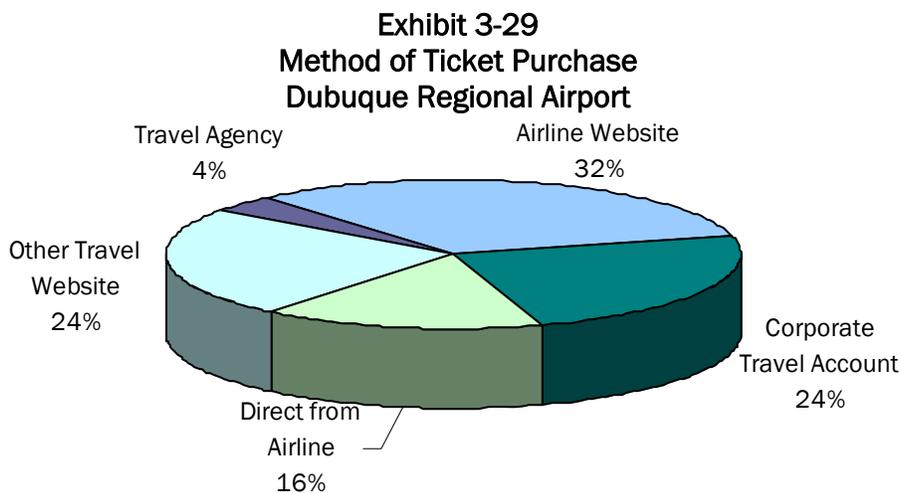
5. What airline are you flying today?

American Eagle is the only carrier currently serving Dubuque Regional Airport.

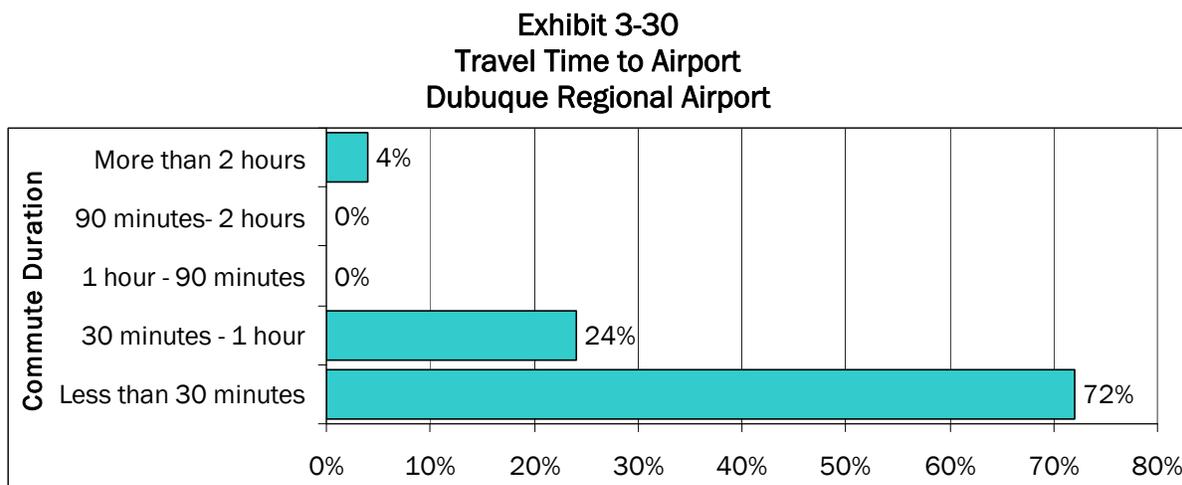
6. What is the number one reason you chose this flight today?

This question was only asked during the in person interviews and was not asked on the survey handouts. Meaningful conclusions for Dubuque Regional Airport for this question could not be developed because of limited number of survey responses.

7. How was your ticket for today's trip purchased?



8. How long did your trip to the airport take?



Source: 2006 Passenger Survey



9. On a scale of 1 to 5, with 1 being poor and 5 being excellent, how would you rate your overall experience with the following airport services and amenities?

**Table 3-34
Service and Amenities Ratings
Dubuque Regional Airport**

Rank	Category	Average Rating
1	Ticket Counter/Lobby	4.88
2	Security Experience	4.81
3	Clarity and Usefulness of Signage	4.64
4	Departure Gate Area	4.38
5	Parking	4.28
6	Restrooms	4.10
7	Restaurants/Bar	3.80
8	News & Gifts	2.82

Source: 2006 Passenger Survey

10. On a scale of 1 to 5, with 1 being not important and 5 being very important, please indicate how important each of the following factors are when choosing a departure airport:

**Table 3-35
Importance of Factors When Choosing a Departure Airport
Dubuque Regional Airport**

Rank	Category	Average Importance
1	Reliability of Airline Service	4.71
2	Airline Fares	4.50
3	Proximity of Airport to Work/Home	4.21
4	Frequency or Schedule of Flights	4.13
5	Cheaper or Free Parking	4.00
6	Nonstop Service to Desired Destination	3.83
7	Faster, Easier Security Clearance	3.79
8	Frequent Flyer/Mileage Program	3.50
9	Passenger Terminal Amenities/Food/Baggage	3.21
10	Aircraft Size	2.92
11	Choice of Airline	2.71

Source: 2006 Passenger Survey



11. Please help us to understand your sensitivity to airline fares:

a. What is the minimum difference in round trip airfares that will cause you to drive to an alternate airport to begin the air portion of your trip?

Table 3-36
Minimum Round Trip Airfare Savings that will Cause Passengers to Drive to Alternate Airport
Dubuque Regional Airport

Minimum Fare Savings	% of Respondents
<\$100	38%
\$100-\$199	42%
\$200-\$299	13%
>\$300	8%
Average- All Respondents	\$119
Source: 2006 Passenger Survey	

b. Is there a maximum drive time that you are willing to drive to an alternate airport to begin the air portion of your trip?

Table 3-37
Maximum Drive Time Passengers are Willing to Drive to Use Alternate Airport
Dubuque Regional Airport

Maximum Driving Time	% of Respondents
<60 min	8%
60 min-119 min	25%
120 min- 179 min	21%
>180 min	46%
Average- All Respondents	135 minutes
Source: 2006 Passenger Survey	

c. Do you check the price differences from this airport versus the alternate airport before making your purchase decision?

Table 3-38
How Often Passengers Noted that They Check Prices from Alternate Airports
Dubuque Regional Airport

Frequency	% of Respondents
Always	63%
Sometimes	21%
Never	17%
Source: 2006 Passenger Survey	



12. Please estimate the total number of airline trips that all members of your household took in the last 12 months:

The number of reported trips by household for Dubuque Regional Airport helps to establish a relative propensity of a region to use airline travel.

Table 3-39
Average Annual Airline Trips per Household
Dubuque Regional Airport

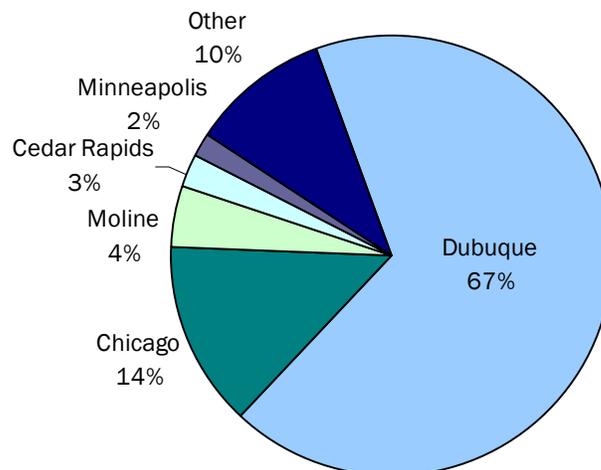
Category	Number of Airline Trips per Household
Business	6.8
Leisure/Personal	2.1
Total	8.9

Source: 2006 Passenger Survey

13. When you took an airline trip, what percentage of your trips in the last year were from this airport as opposed to another airports?

A majority of respondents (67 percent) reported having utilized Dubuque Regional Airport (see **Exhibit 3-31**), indicating that passengers that use Dubuque Regional are often repeat customers and/or favor using the local airport for its convenience. The next chapter of this report will provide information that shows the relative number of travelers associated with this airport’s market area that select another more distant airport to start their airline travel.

Exhibit 3-31
Percentage of Flights Beginning at DBQ and Other Airports
Dubuque Regional Airport



Source: 2006 Passenger Survey



14. What could this airport do to improve your travel experience?

The most common suggestion to improve Dubuque Regional Airport was to offer more direct flights. Respondents also requested expanded commercial service in the form of additional airlines. Other responses included the following:

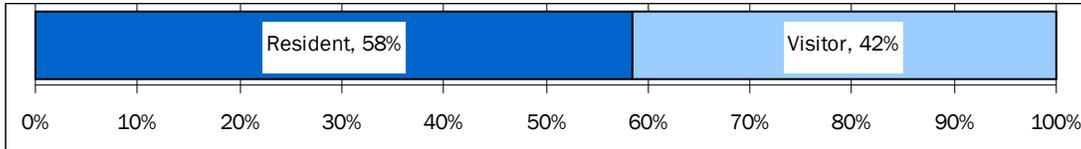
- Keep airfares competitive and lower them, where possible
- Improve restaurant hours to accommodate early morning flight passengers



Fort Dodge – Fort Dodge Regional Airport (FOD) Passenger Survey Results

1. Please indicate whether you are a resident, visitor, or connecting passenger:

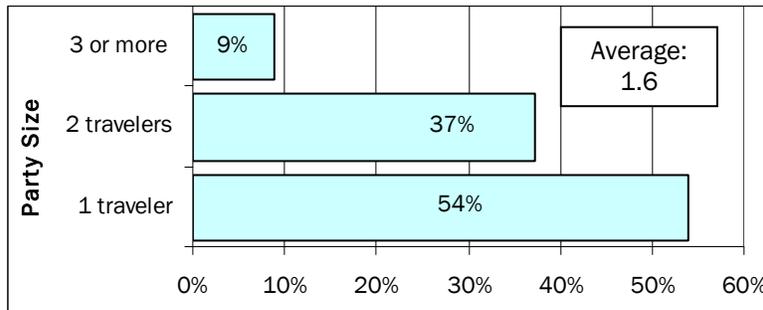
**Exhibit 3-32
Resident versus Visitor Split
Fort Dodge Regional Airport**



Source: 2006 Passenger Survey

2. How many people are in your travel party today?

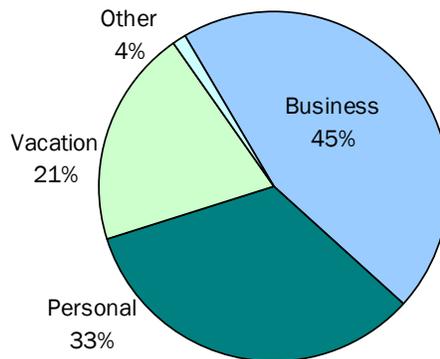
**Exhibit 3-33
Travel Party Size
Fort Dodge Regional Airport**



Source: 2006 Passenger Survey

3. What was the purpose of your trip?

**Exhibit 3-34
Trip Purpose
Fort Dodge Regional Airport**

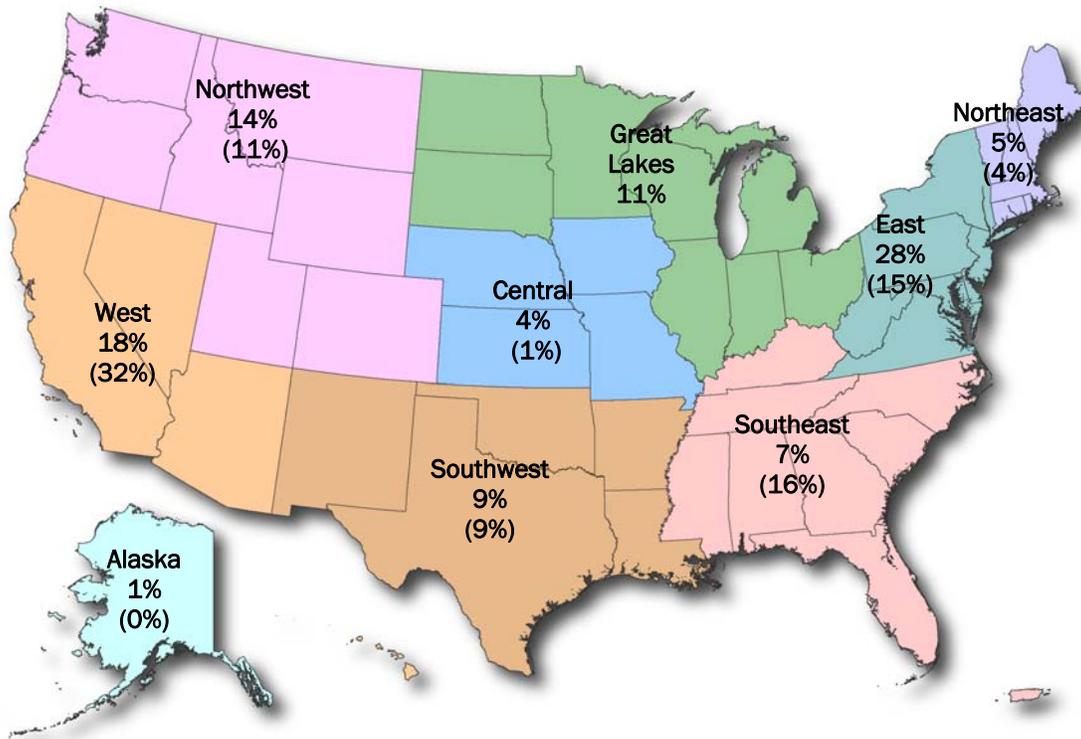


Source: 2006 Passenger Survey

4. In what state is your final destination for today's trip?

Information on travel patterns was requested as part of this survey to ensure the validity of the survey results. Travel patterns identified by survey respondents, while somewhat different, are comparable to travel patterns reflected in US DOT data. This finding helps to ensure the validity of the survey sample. **Exhibit 3-35** shows final destination regions for passengers at Fort Dodge Regional Airport. Individually, locations in Arizona were the most common, with 10 percent of the total trips, followed by locations in Pennsylvania, Texas, and Washington, with 8 percent each. Regional travel patterns recorded as part of this study's passenger surveys were compared to regional travel patterns for the airport obtained from US DOT data for the airport. This information was previously presented in Chapter One. US DOT travel patterns represent a much longer period of time; this study's passenger survey results reflect travel patterns on the days the surveys were completed. As a result, some difference in the two results can be expected.

Exhibit 3-35
Reported Final Destination Regions for Passengers
Fort Dodge Regional Airport



Sources: 2006 Passenger Survey; () = Regional Travel as Reported by US DOT



5. What airline are you flying today?

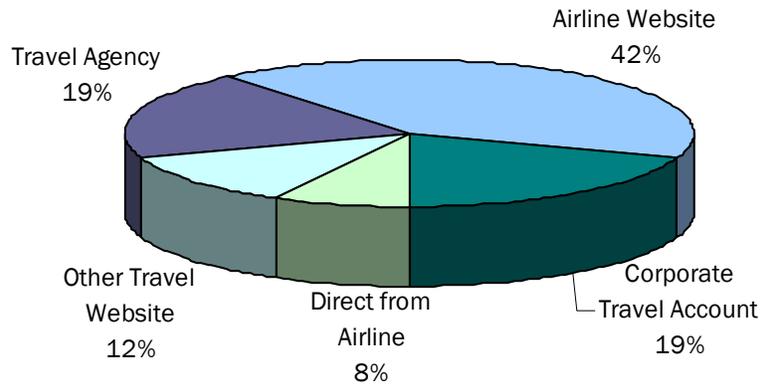
Northwest Airlinck carrier, Mesaba, is the only carrier currently serving Fort Dodge Regional Airport.

6. What is the number one reason you chose this flight today?

This question was only asked during the in person interviews and was not asked on the survey handouts. Limited survey responses did not enable the development of meaningful conclusions for Fort Dodge Regional Airport for this question.

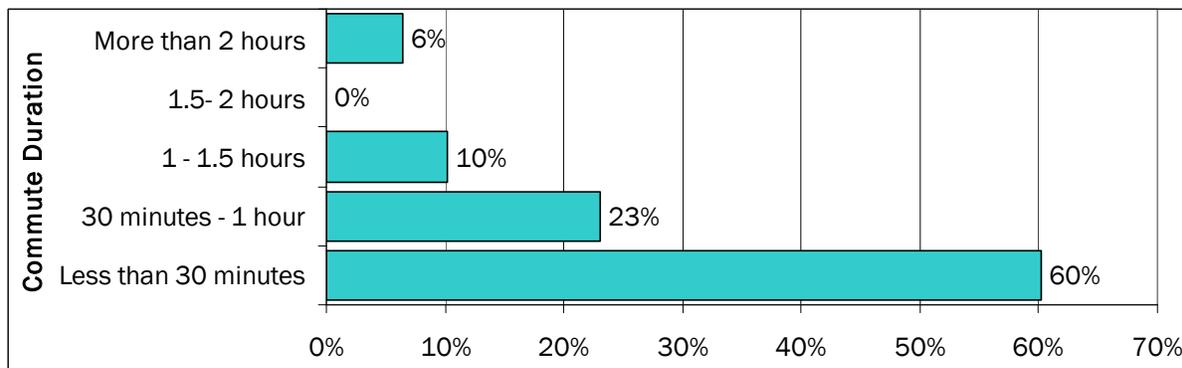
7. How was your ticket for today's trip purchased?

**Exhibit 3-36
Method of Ticket Purchase
Fort Dodge Regional Airport**



8. How long did your trip to the airport take?

**Exhibit 3-37
Travel Time to Airport
Fort Dodge Regional Airport**



Source: 2006 Passenger Survey



9. On a scale of 1 to 5, with 1 being poor and 5 being excellent, how would you rate your overall experience with the following airport services and amenities?

**Table 3-40
Service and Amenities Ratings
Fort Dodge Regional Airport**

Rank	Category	Average Rating
1	Parking	4.88
2	Ticket Counter/Lobby	4.83
3	Restrooms	4.70
4	Departure Gate Area	4.54
5	Security Experience	4.54
6	Clarity and Usefulness of Signage	4.50
7	News & Gifts	3.92
8	Restaurants/Bar	3.64

Source: 2006 Passenger Survey

10. On a scale of 1 to 5, with 1 being not important and 5 being very important, please indicate how important each of the following factors are when choosing a departure airport:

**Table 3-41
Importance of Factors When Choosing a Departure Airport
Fort Dodge Regional Airport**

Rank	Category	Average Importance
1	Proximity of Airport to Work/Home	4.58
2	Reliability of Airline Service	4.35
3	Frequency or Schedule of Flights	4.22
4	Airline Fares	4.02
5	Cheaper or Free Parking	3.75
6	Faster, Easier Security Clearance	3.73
7	Nonstop Service to Desired Destination	3.59
8	Choice of Airline	3.48
9	Frequent Flyer/Mileage Program	3.38
10	Aircraft Size	3.26
11	Passenger Terminal Amenities/Food/Baggage	3.18

Source: 2006 Passenger Survey



11. Please help us to understand your sensitivity to airline fares:

a. What is the minimum difference in round trip airfares that will cause you to drive to an alternate airport to begin the air portion of your trip?

Table 3-42
Minimum Round Trip Airfare Savings that will Cause Passengers to Drive to Alternate Airport
Fort Dodge Regional Airport

Minimum Fare Savings	% of Respondents
<\$100	16%
\$100-\$199	53%
\$200-\$299	18%
>\$300	13%
Average- All Respondents	\$151
Source: 2006 Passenger Survey	

b. Is there a maximum drive time that you are willing to drive to an alternate airport to begin the air portion of your trip?

Table 3-43
Maximum Drive Time Passengers are Willing to Drive to Use Alternate Airport
Fort Dodge Regional Airport

Maximum Driving Time	% of Respondents
<60 min	6%
60 min-119 min	30%
120 min- 179 min	41%
>180 min	23%
Average- All Respondents	118 minutes
Source: 2006 Passenger Survey	

c. Do you check the price differences from this airport versus the alternate airport before making your purchase decision?

Table 3-44
How Often Passengers Noted that They Check Prices from Alternate Airports
Fort Dodge Regional Airport

Frequency	% of Respondents
Always	45%
Sometimes	35%
Never	20%
Source: 2006 Passenger Survey	



12. Please estimate the total number of airline trips that all members of your household took in the last 12 months:

The number of reported trips by household for Fort Dodge Regional Airport helps to establish a relative propensity of a region to use airline travel.

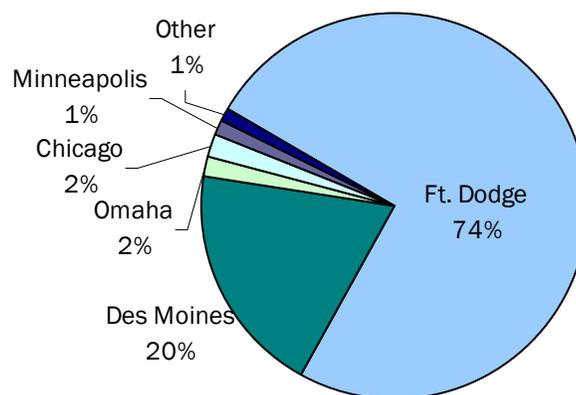
Table 3-45
Average Annual Airline Trips per Household
Fort Dodge Regional Airport

Category	Number of Airline Trips per Household
Business	3.4
Leisure/Personal	3.6
Total	7.0
Source: 2006 Passenger Survey	

13. When you took an airline trip, what percentage of your trips in the last year were from this airport as opposed to another airports?

Responses to this question largely favored Fort Dodge Regional Airport (**Exhibit 3-38**), with passengers reporting that 74 percent of their air travel originates from this airport. That indicates that passengers that use Fort Dodge Regional are often repeat customers and/or favor using the local airport for its convenience. The response to this question does not capture travelers who never use their local airport. The next chapter of this report provides information on air travelers associated with the Fort Dodge market area who select other airports to begin their airline travel.

Exhibit 3-38
Percentage of Flights Beginning at FOD and Other Airports
Fort Dodge Regional Airport



Source: 2006 Passenger Survey



What could this airport do to improve your travel experience?

The most common suggestion to improve Fort Dodge Regional Airport was to offer more food options or to add an airport bar. Other responses included the following:

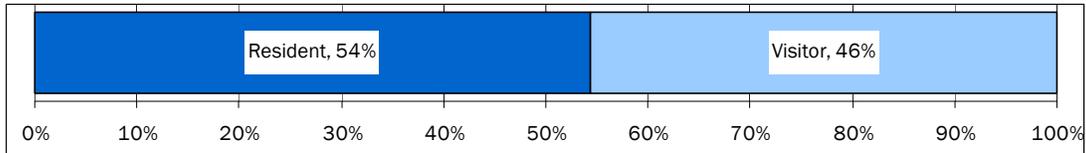
- Add more flights to new locations
- Cut down on flight time by not stopping in Mason City
- Add regional jet service
- Offer a better flight schedule/departing times



Mason City – Mason City Municipal Airport (MCW) Passenger Survey Results

1. Please indicate whether you are a resident, visitor, or connecting passenger:

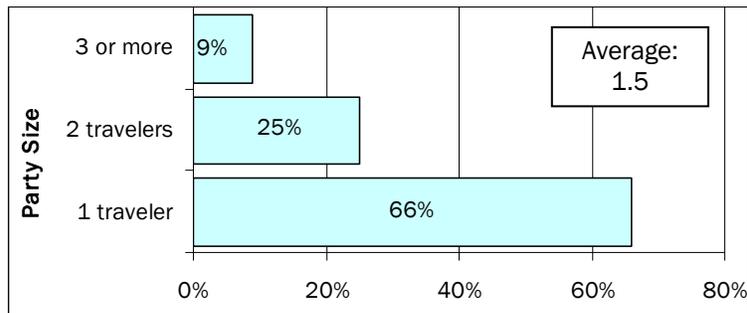
**Exhibit 3-39
Resident versus Visitor Split
Mason City Municipal Airport**



Source: 2006 Passenger Survey

2. How many people are in your travel party today?

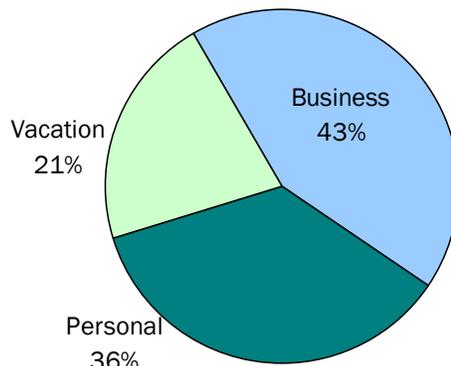
**Exhibit 3-40
Travel Party Size
Mason City Municipal Airport**



Source: 2006 Passenger Survey

3. What was the purpose of your trip?

**Exhibit 3-41
Trip Purpose
Mason City Municipal Airport**

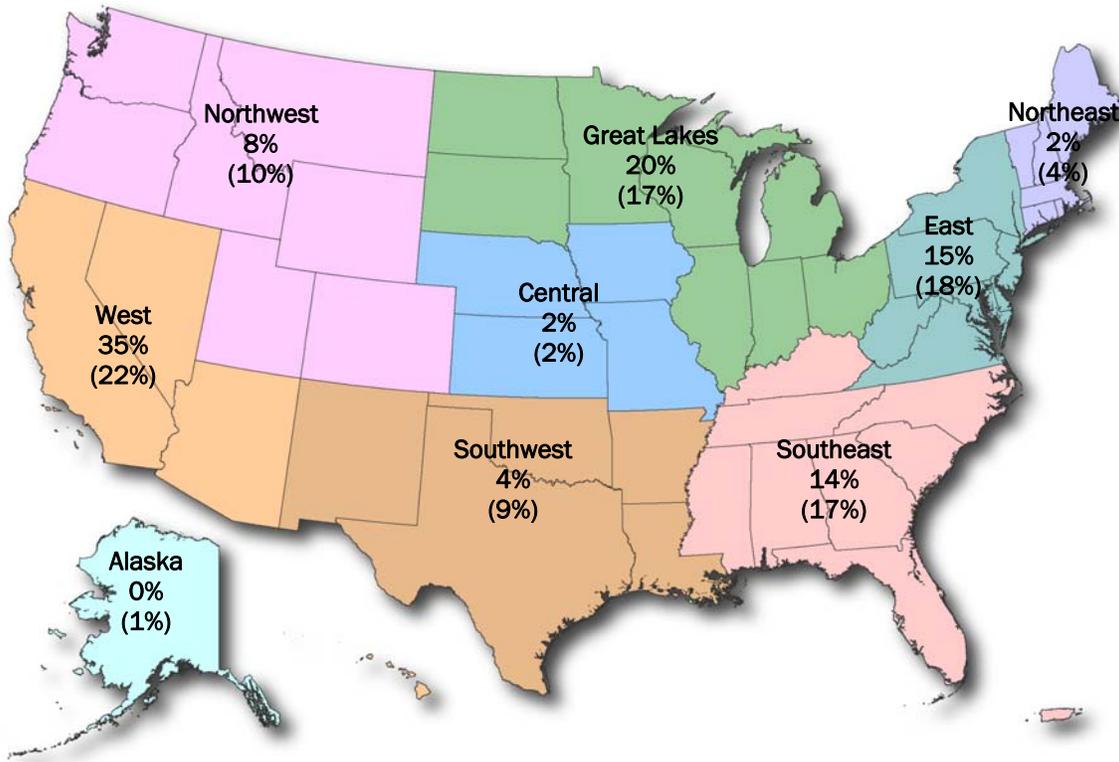


Source: 2006 Passenger Survey

4. In what state is your final destination for today's trip?

Information on travel patterns was requested as part of this survey to ensure the validity of the survey results. Travel patterns identified by survey respondents, while somewhat different, are comparable to travel patterns reflected in US DOT data. This finding helps to ensure the validity of the survey sample. **Exhibit 3-42** shows final destination regions for passengers leaving from Mason City Municipal Airport. Individually, destinations in Arizona were the most common with 16 percent of the total, followed by destinations in California with 12 percent. Regional travel patterns recorded as part of this study's passenger surveys were compared to regional travel patterns for the airport obtained from US DOT data for the airport. This information was previously presented in Chapter One. US DOT travel patterns represent a much longer period of time; this study's passenger survey results reflect travel patterns on the days the surveys were completed. As a result, some difference in the two results can be expected.

Exhibit 3-42
Reported Final Destination Regions for Passengers
Mason City Municipal Airport



Sources: 2006 Passenger Survey; () = Regional travel as reported by US DOT

5. What airline are you flying today?

Northwest Airlinck carrier, Mesaba, is the only carrier currently serving Mason City Municipal Airport.

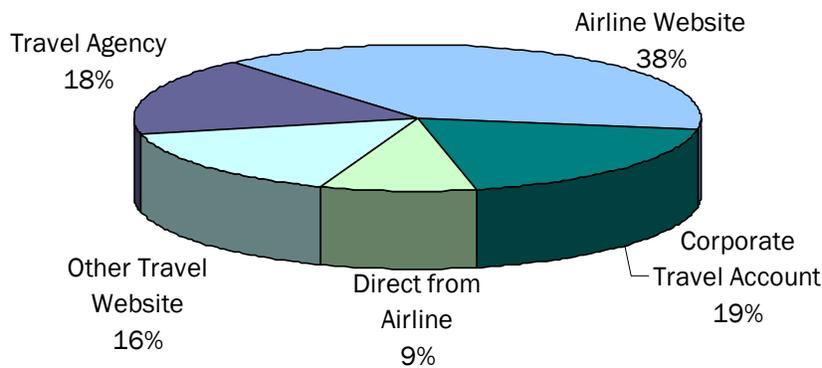


6. What is the number one reason you chose this flight today?

This question was only asked during the in person interviews and was not asked on the survey handouts. Sufficient data was not collected at this airport to provide a meaningful result for this question,

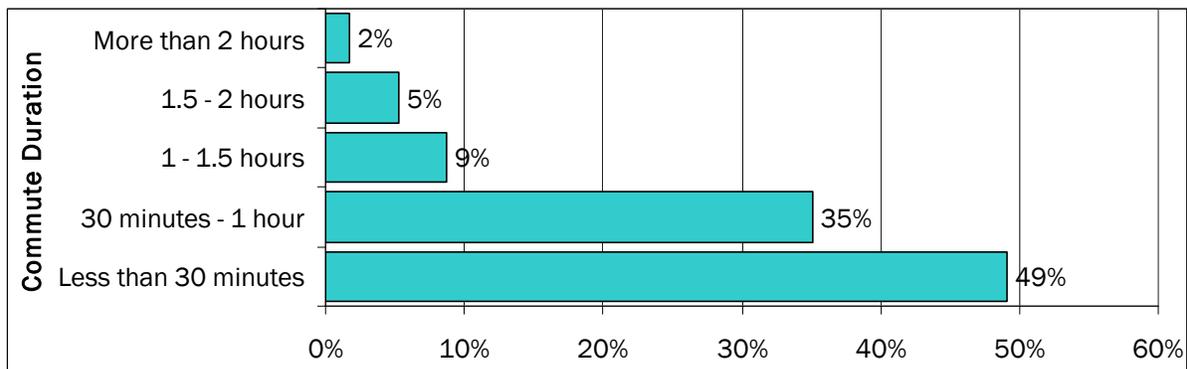
7. How was your ticket for today's trip purchased?

**Exhibit 3-43
Method of Ticket Purchase
Mason City Municipal Airport**



8. How long did your trip to the airport take?

**Exhibit 3-44
Travel Time to Airport
Mason City Municipal Airport**



Source: 2006 Passenger Survey



9. On a scale of 1 to 5, with 1 being poor and 5 being excellent, how would you rate your overall experience with the following airport services and amenities?

**Table 3-46
Service and Amenities Ratings
Mason City Municipal Airport**

Rank	Category	Average Rating
1	Parking	4.96
2	Ticket Counter/Lobby	4.88
3	Security Experience	4.81
4	Departure Gate Area	4.70
5	Restrooms	4.63
6	Clarity and Usefulness of Signage	4.58
7	Restaurants/Bar	4.00
8	News & Gifts	3.82

Source: 2006 Passenger Survey

10. On a scale of 1 to 5, with 1 being not important and 5 being very important, please indicate how important each of the following factors are when choosing a departure airport:

**Table 3-47
Importance of Factors When Choosing a Departure Airport
Mason City Municipal Airport**

Rank	Category	Average Importance
1	Proximity of Airport to Work/Home	4.55
2	Reliability of Airline Service	4.54
3	Airline Fares	4.48
4	Frequency or Schedule of Flights	4.14
5	Faster, Easier Security Clearance	3.91
6	Cheaper or Free Parking	3.82
7	Nonstop Service to Desired Destination	3.70
8	Frequent Flyer/Mileage Program	3.66
9	Choice of Airline	3.42
10	Passenger Terminal Amenities/Food/Baggage	3.07
11	Aircraft Size	3.07

Source: 2006 Passenger Survey



11. Please help us to understand your sensitivity to airline fares:

a. What is the minimum difference in round trip airfares that will cause you to drive to an alternate airport to begin the air portion of your trip?

Table 3-48
Minimum Round Trip Airfare Savings that Will Cause Passengers to Drive to Alternate Airport
Mason City Municipal Airport

Minimum Fare Savings	% of Respondents
<\$100	41%
\$100-\$199	37%
\$200-\$299	17%
>\$300	4%
Average- All Respondents	\$108
Source: 2006 Passenger Survey	

b. Is there a maximum drive time that you are willing to drive to an alternate airport to begin the air portion of your trip?

Table 3-49
Maximum Drive Time Passengers are Willing to Drive to Use Alternate Airport
Mason City Municipal Airport

Maximum Driving Time	% of Respondents
<60 min	10%
60 min-119 min	13%
120 min- 179 min	67%
>180 min	10%
Average- All Respondents	119 minutes
Source: 2006 Passenger Survey	

c. Do you check the price differences from this airport versus the alternate airport before making your purchase decision?

Table 3-50
How Often Passengers Noted that They Check Prices from Alternate Airports
Mason City Municipal Airport

Frequency	% of Respondents
Always	55%
Sometimes	32%
Never	13%
Source: 2006 Passenger Survey	



12. Please estimate the total number of airline trips that all members of your household took in the last 12 months:

The number of reported trips by household for Mason City Municipal Airport helps to establish a relative propensity of a region to use airline travel.

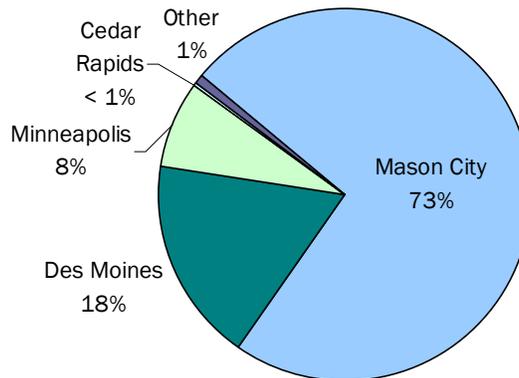
Table 3-51
Average Annual Airline Trips per Household
Mason City Municipal Airport

Category	Number of Airline Trips per Household
Business	9.0
Leisure/Personal	3.9
Total	12.9
Source: 2006 Passenger Survey	

13. When you took an airline trip, what percentage of your trips in the last year were from this airport as opposed to other airports?

Responses to this question largely favored Mason City Municipal Airport (see **Exhibit 3-45**), with passengers reporting that 73 percent of their air travel begins at this airport. This indicates that passengers that use Mason City Municipal are often repeat customers and/or favor using the local airport for its convenience. These responses do not reflect departure choices for travelers associated with this market area who never use this airport. This airport, as will be noted in the next chapter, has a notable number of airline travelers associated with its market area that use other airports.

Exhibit 3-45
Percentage of Flights Beginning at MCW and Other Airports
Mason City Municipal Airport



Source: 2006 Passenger Survey



14. What could this airport do to improve your travel experience?

Respondents seemed to be divided on the quality of service being offered at Mason City Municipal Airport. The most common suggestion was to increase the number of flights and expand the destinations offered. Other responses included the following:

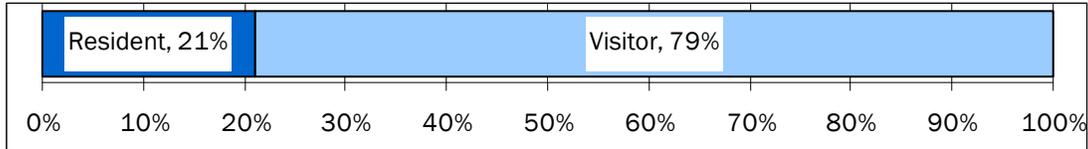
- Lower fares, if possible
- Offer a better flight schedule/departing times
- Add more food options at the airport



Sioux City – Sioux Gateway Airport (SUX) Passenger Survey Results

1. Please indicate whether you are a resident, visitor, or connecting passenger:

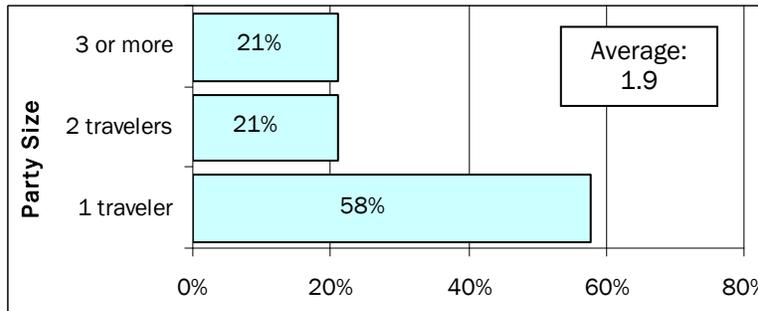
**Exhibit 3-46
Resident versus Visitor Split
Sioux Gateway Airport**



Source: 2006 Passenger Survey

2. How many people are in your travel party today?

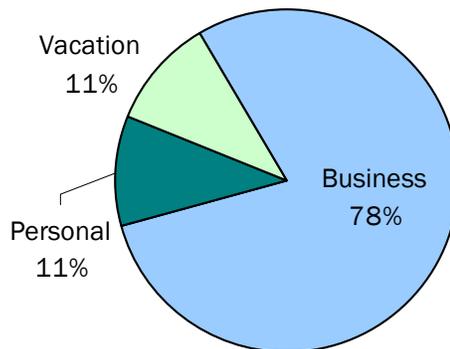
**Exhibit 3-47
Travel Party Size
Sioux Gateway Airport**



Source: 2006 Passenger Survey

3. What was the purpose of your trip?

**Exhibit 3-48
Trip Purpose
Sioux Gateway Airport**

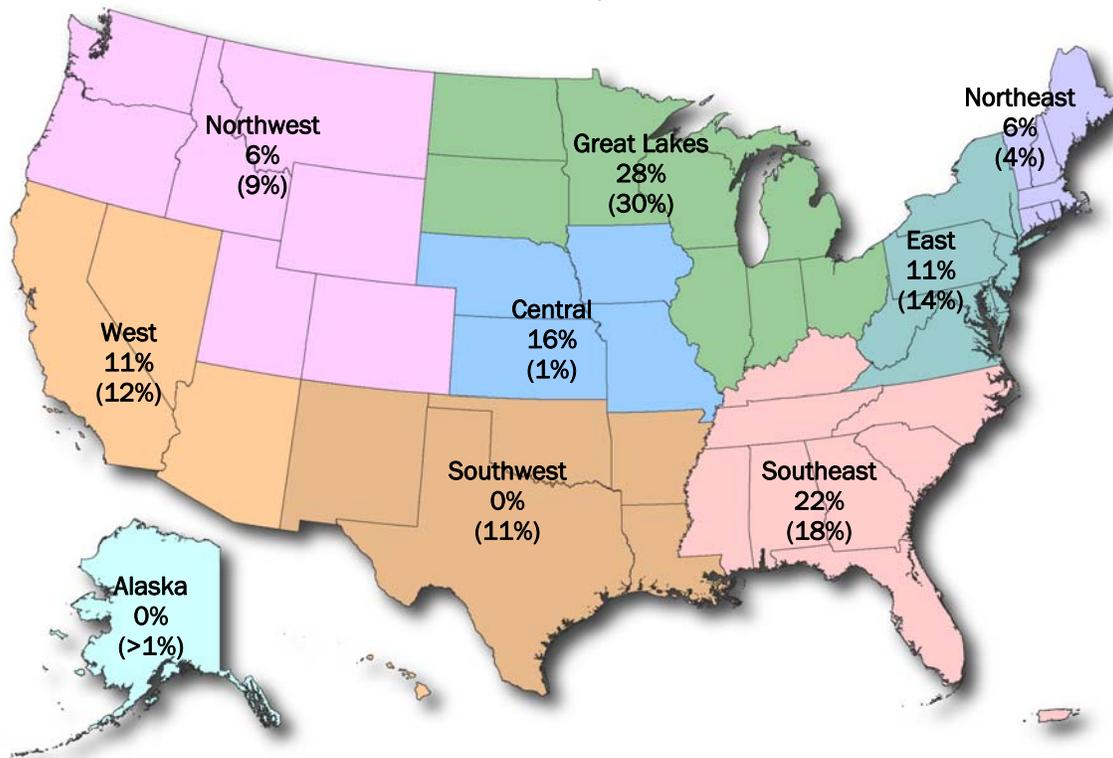


Source: 2006 Passenger Survey

4. In what state is your final destination for today's trip?

Information on travel patterns was requested as part of this survey to ensure the validity of the survey results. Travel patterns identified by survey respondents, while somewhat different, are comparable to travel patterns reflected in US DOT data. This finding helps to ensure the validity of the survey sample. **Exhibit 3-49** shows final destination regions for passengers at Sioux Gateway. Locations in Michigan were the most common individual state destination with 16 percent of the response total. Regional travel patterns recorded as part of this study's passenger surveys were compared to regional travel patterns for the airport obtained from US DOT data for the airport. This information was previously presented in Chapter One. US DOT travel patterns represent a much longer period of time; this study's passenger survey results reflect travel patterns on the days the surveys were completed. As a result, some difference in the two results can be expected.

Exhibit 3-49
Reported Final Destination Regions for Passengers
Sioux Gateway Airport



Sources: 2006 Passenger Survey; () = Regional Travel as Reported by US DOT



5. What airline are you flying today?

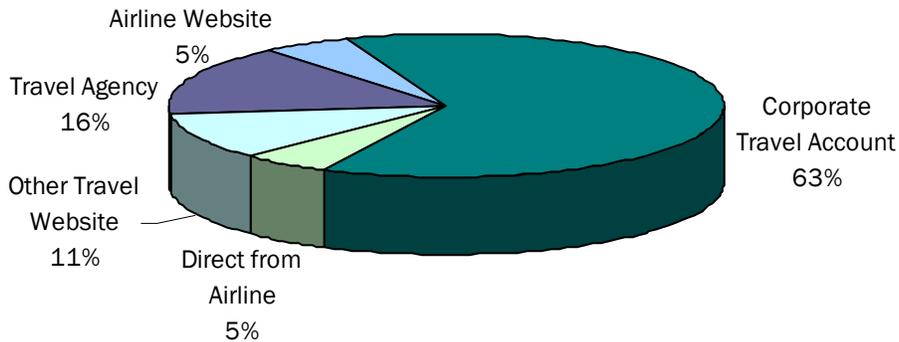
Northwest Airlinck carrier, Mesaba, is the only carrier currently serving Sioux Gateway Airport.

6. What is the number one reason you chose this flight today?

This question was only asked during the in person interviews and was not asked on the survey handouts. Limited data for this question prevented a meaningful summary of responses at this airport.

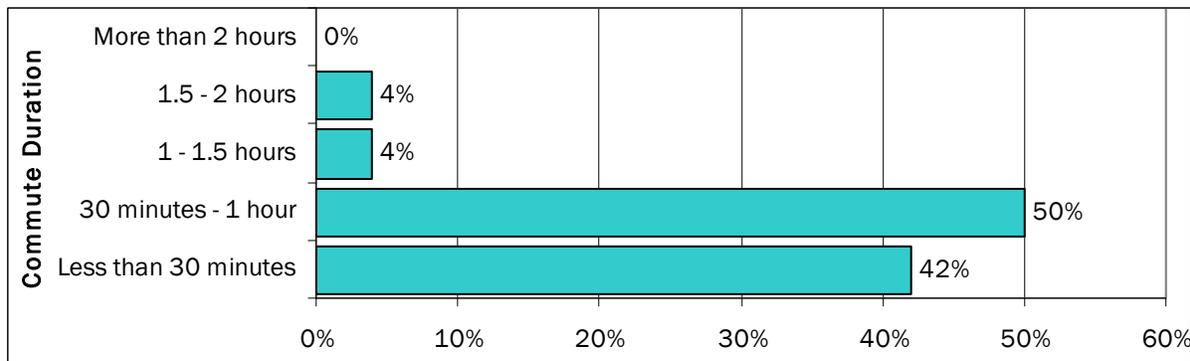
7. How was your ticket for today's trip purchased?

**Exhibit 3-50
Method of Ticket Purchase
Sioux Gateway Airport**



8. How long did your trip to the airport take?

**Exhibit 3-51
Travel Time to Airport
Sioux Gateway Airport**



Source: 2006 Passenger Survey



9. On a scale of 1 to 5, with 1 being poor and 5 being excellent, how would you rate your overall experience with the following airport services and amenities?

Table 3-52
Service and Amenities Ratings Sioux Gateway Airport

Rank	Category	Average Rating
1	Parking	4.90
2	Ticket Counter/Lobby	4.53
3	Restrooms	4.33
4	Clarity and Usefulness of Signage	4.21
5	Security Experience	3.89
6	Departure Gate Area	3.84
7	Restaurants/Bar	3.00
8	News & Gifts	2.50

Source: 2006 Passenger Survey

10. On a scale of 1 to 5, with 1 being not important and 5 being very important, please indicate how important each of the following factors are when choosing a departure airport:

Table 3-53
Importance of Factors When Choosing a Departure Airport
Sioux Gateway Airport

Rank	Category	Average Importance
1	Reliability of Airline Service	4.64
2	Frequency or Schedule of Flights	4.14
3	Nonstop Service to Desired Destination	3.96
4	Frequent Flyer/Mileage Program	3.86
5	Airline Fares	3.82
6	Proximity of Airport to Work/Home	3.78
7	Choice of Airline	3.48
8	Faster, Easier Security Clearance	3.38
9	Passenger Terminal Amenities/Food/Baggage	3.36
10	Aircraft Size	3.32
11	Cheaper or Free Parking	3.18

Source: 2006 Passenger Survey



11. Please help us to understand your sensitivity to airline fares:

a. What is the minimum difference in round trip airfares that will cause you to drive to an alternate airport to begin the air portion of your trip?

Table 3-54
Minimum Round Trip Airfare Savings that will Cause Passengers to Drive to Alternate Airport
Sioux Gateway Airport

Minimum Fare Savings	% of Respondents
<\$100	17%
\$100-\$199	39%
\$200-\$299	22%
>\$300	22%
Average- All Respondents	\$176
Source: 2006 Passenger Survey	

b. Is there a maximum drive time that you are willing to drive to an alternate airport to begin the air portion of your trip?

Table 3-55
Maximum Drive Time Passengers are Willing to Drive to Use Alternate Airport
Sioux Gateway Airport

Maximum Driving Time	% of Respondents
<60 min	11%
60 min-119 min	42%
120 min- 179 min	42%
>180 min	5%
Average- All Respondents	85 minutes
Source: 2006 Passenger Survey	

c. Do you check the price differences from this airport versus the alternate airport before making your purchase decision?

Table 3-56
How Often Passengers Noted that the Check Prices from Alternate Airports
Sioux Gateway Airport

Frequency	% of Respondents
Always	63%
Sometimes	37%
Never	0%
Source: 2006 Passenger Survey	



12. Please estimate the total number of airline trips that all members of your household took in the last 12 months

The number of reported trips by household for Sioux Gateway Airport helps to establish a relative propensity of a region to use airline travel. Due to the limited number of resident survey responses, it is likely that the number of annual trips per household for Sioux Gateway Airport as shown in **Table 3-57** is understated

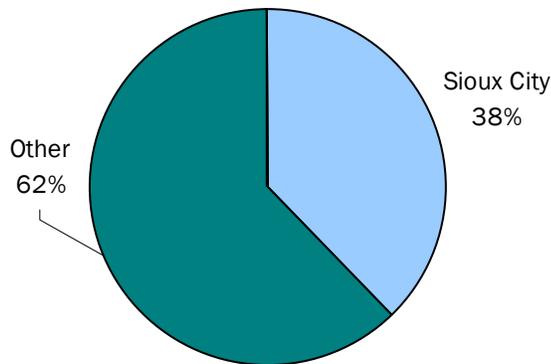
Table 3-57
Average Annual Airline Trips per Household
Sioux Gateway Airport

Category	Number of Airline Trips per Household
Business	1.3
Leisure/Personal	2.5
Total	3.8
Source: 2006 Passenger Survey	

13. When you took an airline trip, what percentage of your trips in the last year were from this airport as opposed to other airports?

Due to the limited number of resident survey responses, the trips data presented in **Exhibit 3-52** may not be reflective of the actual community usage of alternate airports versus Sioux Gateway Airport.

Exhibit 3-52
Percentage of Flights Beginning at SUX and Other Airports
Sioux Gateway Airport



Source: 2006 Passenger Survey



14. What could this airport do to improve your travel experience?

The most common response among Sioux Gateway Airport passengers was to add a bar to the terminal, followed closely by adding more direct flights and offering lower fares. Other responses included the following:

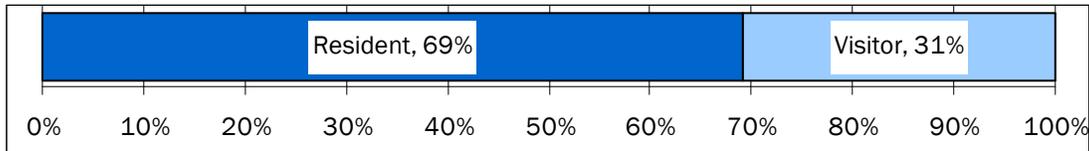
- Offer better cab service
- Offer a better flight schedule/departing times
- Add more food options at the airport, including early options
- Add additional airlines



Waterloo – Waterloo Regional Airport (ALO) Passenger Survey Results

1. Please indicate whether you are a resident, visitor, or connecting passenger:

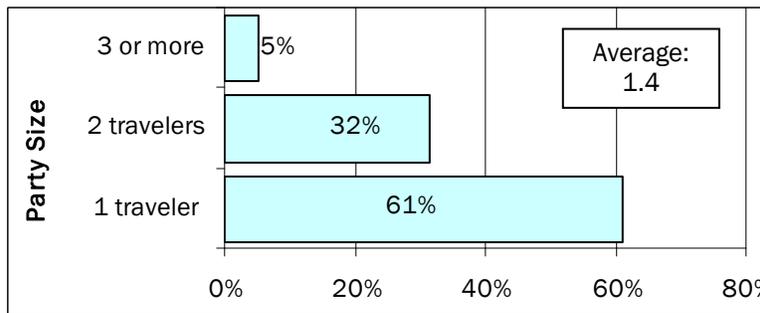
**Exhibit 3-53
Resident versus Visitor Split
Waterloo Regional Airport**



Source: 2006 Passenger Survey

2. How many people are in your travel party today?

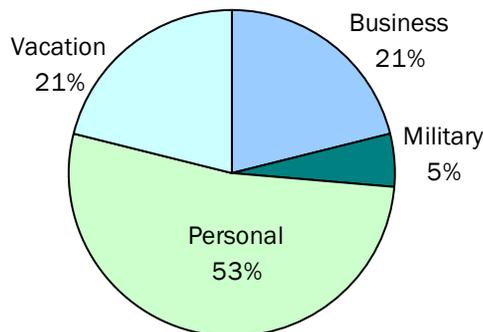
**Exhibit 3-54
Travel Party Size
Waterloo Regional Airport**



Source: 2006 Passenger Survey

3. What was the purpose of your trip?

**Exhibit 3-55
Trip Purpose
Waterloo Regional Airport**

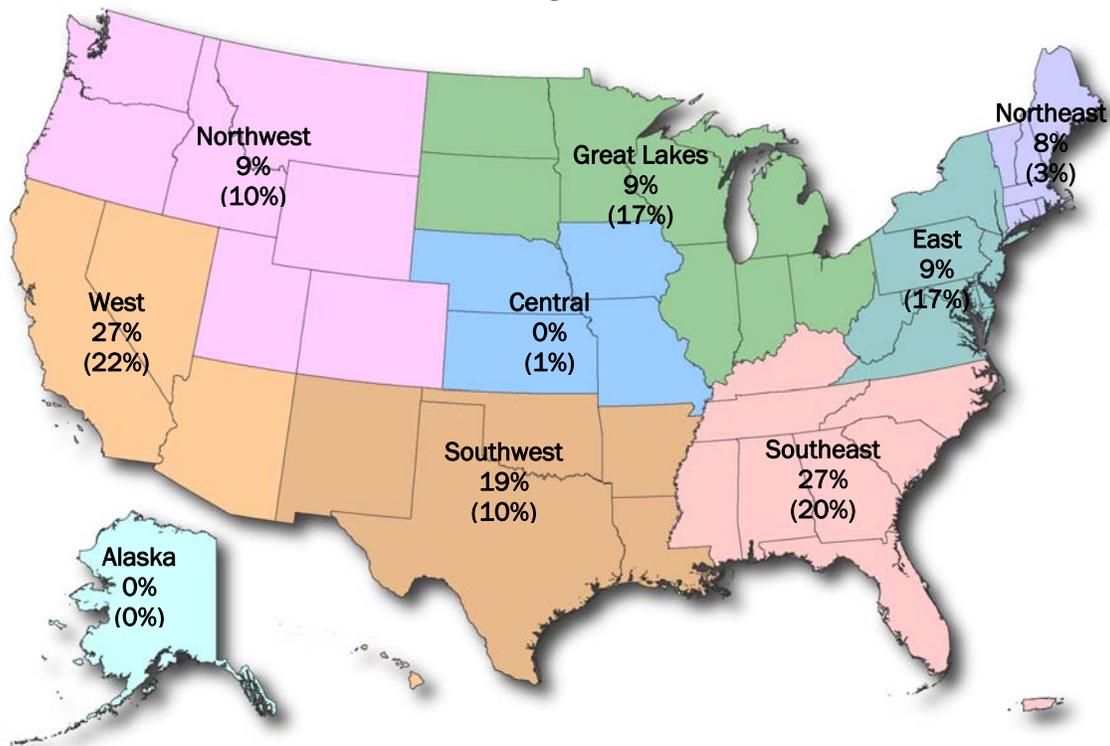


Source: 2006 Passenger Survey

4. In what state is your final destination for today's trip?

Information on travel patterns was requested as part of this survey to ensure the validity of the survey results. Travel patterns identified by survey respondents, while somewhat different, are comparable to travel patterns reflected in US DOT data. This finding helps to ensure the validity of the survey sample. **Exhibit 3-56** presents final destination regions for passengers originating at Waterloo Regional Airport. Individually, locations in California were the most popular destination. Regional travel patterns recorded as part of this study's passenger surveys were compared to regional travel patterns for the airport obtained from US DOT data for the airport. This information was previously presented in Chapter One. US DOT travel patterns represent a much longer period of time; this study's passenger survey results reflect travel patterns on the days the surveys were completed. As a result, some difference in the two results can be expected.

Exhibit 3-56
Reported Final Destination Regions for Passengers
Waterloo Regional Airport



Sources: 2006 Passenger Survey; () = Regional Travel as Reported by US DOT



5. What airline are you flying today?

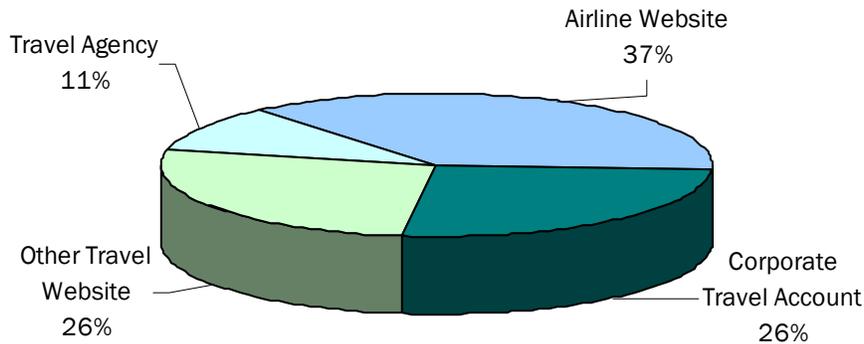
Northwest Airlines is the only airline currently serving Waterloo Regional Airport.

6. What is the number one reason you chose this flight today?

This question was only asked during the in person interviews and was not asked on the survey handouts. Meaningful conclusions for Waterloo Regional Airport could not be developed for this question because of the limited number of responses to this question.

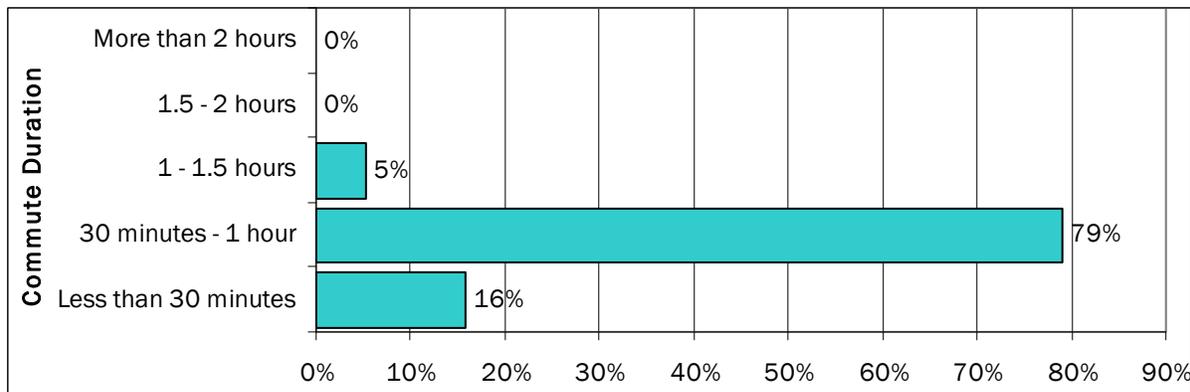
7. How was your ticket for today's trip purchased?

**Exhibit 3-57
Method of Ticket Purchase
Waterloo Regional Airport**



8. How long did your trip to the airport take?

**Exhibit 3-58
Travel Time to Airport
Waterloo Regional Airport**



Source: 2006 Passenger Survey



9. On a scale of 1 to 5, with 1 being poor and 5 being excellent, how would you rate your overall experience with the following airport services and amenities?

**Table 3-58
Service and Amenities Ratings
Waterloo Regional Airport**

Rank	Category	Average Rating
1	Ticket Counter/Lobby	4.39
2	Restaurants/Bar	4.29
3	Restrooms	4.24
4	Parking	4.23
5	Clarity and Usefulness of Signage	4.11
6	Security Experience	3.94
7	Departure Gate Area	3.94
8	News & Gifts	3.50

Source: 2006 Passenger Survey

10. On a scale of 1 to 5, with 1 being not important and 5 being very important, please indicate how important each of the following factors are when choosing a departure airport:

**Table 3-59
Importance of Factors When Choosing a Departure Airport
Waterloo Regional Airport**

Rank	Category	Average Importance
1	Reliability of Airline Service	4.41
2	Airline Fares	4.29
3	Proximity of Airport to Work/Home	4.29
4	Nonstop Service to Desired Destination	3.41
5	Aircraft Size	3.41
6	Frequency or Schedule of Flights	3.18
7	Cheaper or Free Parking	3.12
8	Passenger Terminal Amenities/Food/Baggage	3.12
9	Choice of Airline	3.07
10	Frequent Flyer/Mileage Program	3.00
11	Faster, Easier Security Clearance	2.82

Source: 2006 Passenger Survey



11. Please help us to understand your sensitivity to airline fares:

a. What is the minimum difference in round trip airfares that will cause you to drive to an alternate airport to begin the air portion of your trip?

Table 3-60
Minimum Round Trip Airfare Savings that Will Cause Passengers to Drive to Alternate Airport Waterloo Regional Airport

Minimum Fare Savings	% of Respondents
<\$100	39%
\$100-\$199	11%
\$200-\$299	28%
>\$300	22%
Average- All Respondents	\$150
Source: 2006 Passenger Survey	

b. Is there a maximum drive time that you are willing to drive to an alternate airport to begin the air portion of your trip?

Table 3-61
Maximum Drive Time Passengers are Willing to Drive to Use Alternate Airport Waterloo Regional Airport

Maximum Driving Time	% of Respondents
<60 min	21%
60 min-119 min	37%
120 min- 179 min	32%
>180 min	11%
Average- All Respondents	82 minutes
Source: 2006 Passenger Survey	

c. Do you check the price differences from this airport versus the alternate airport before making your purchase decision?

Table 3-62
How Often Passengers Noted that They Check Prices from Alternate Airports Waterloo Regional Airport

Frequency	% of Respondents
Always	42%
Sometimes	37%
Never	21%
Source: 2006 Passenger Survey	



12. Please estimate the total number of airline trips that all members of your household took in the last 12 months

The number of reported trips by household for Waterloo Regional Airport helps to establish a relative propensity of a region to use airline travel.. Due to the limited number of resident survey responses, it is likely that the number of annual trips per household for Waterloo Regional Airport as shown in **Table 3-63** is understated

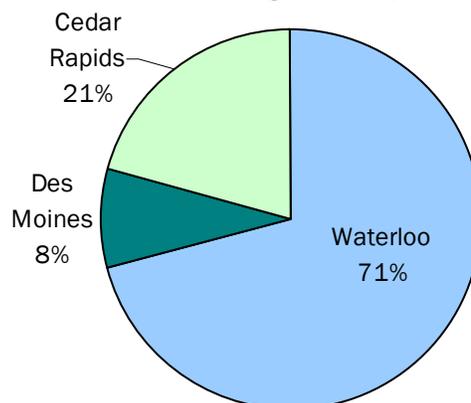
Table 3-63
Average Annual Airline Trips per Household
Waterloo Regional Airport

Category	Number of Airline Trips per Household
Business	1.25
Leisure/Personal	1.75
Total	3.0
Source: 2006 Passenger Survey	

13. When you took an airline trip, what percentage of your trips in the last year were from this airport as opposed to other airports?

Due to the limited number of resident survey responses, the trips data presented in **Exhibit 3-59** may not be reflective of the actual community usage of alternate airports versus Waterloo Regional Airport. These responses reflect those travelers who typically use this airport for their airline travel. Additional information on travelers associated with this airport’s market area who use other airports will be presented in the next chapter of this study.

Exhibit 3-59
Percentage of Flights Beginning at ALO and Other Airports
Waterloo Regional Airport



Source: 2006 Passenger Survey



14. What could this airport do to improve your travel experience?

The following suggestions were given equal importance by survey respondents:

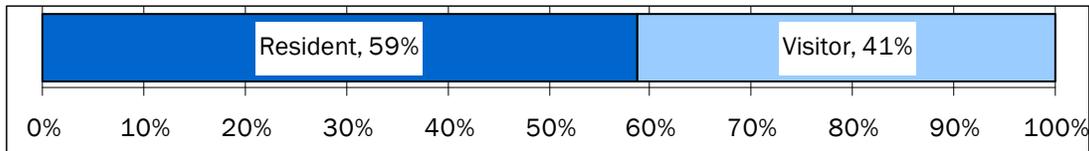
- Have a loading bridge from the gate to the plane
- Add more direct flights
- Lower air fares
- Improve speed of security checkpoint
- Add restrooms to the quarantine area



Moline, Illinois – Quad City International Airport (MLI) Passenger Survey Results

1. Please indicate whether you are a resident, visitor, or connecting passenger:

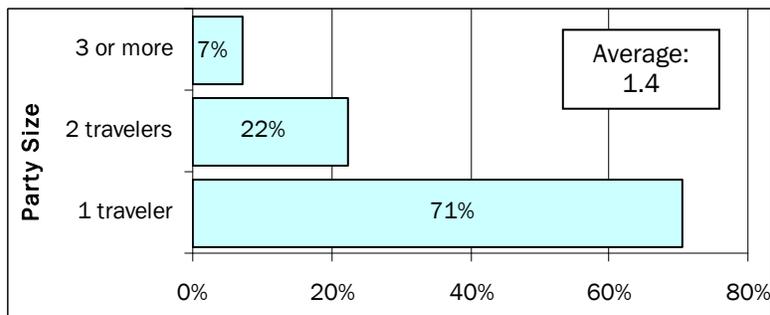
**Exhibit 3-60
Resident versus Visitor Split
Quad City International Airport**



Source: 2006 Passenger Survey

2. How many people are in your travel party today?

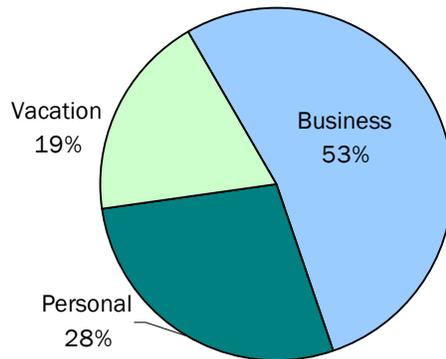
**Exhibit 3-61
Travel Party Size
Quad City International Airport**



Source: 2006 Passenger Survey

3. What was the purpose of your trip?

**Exhibit 3-62
Trip Purpose
Quad City International Airport**

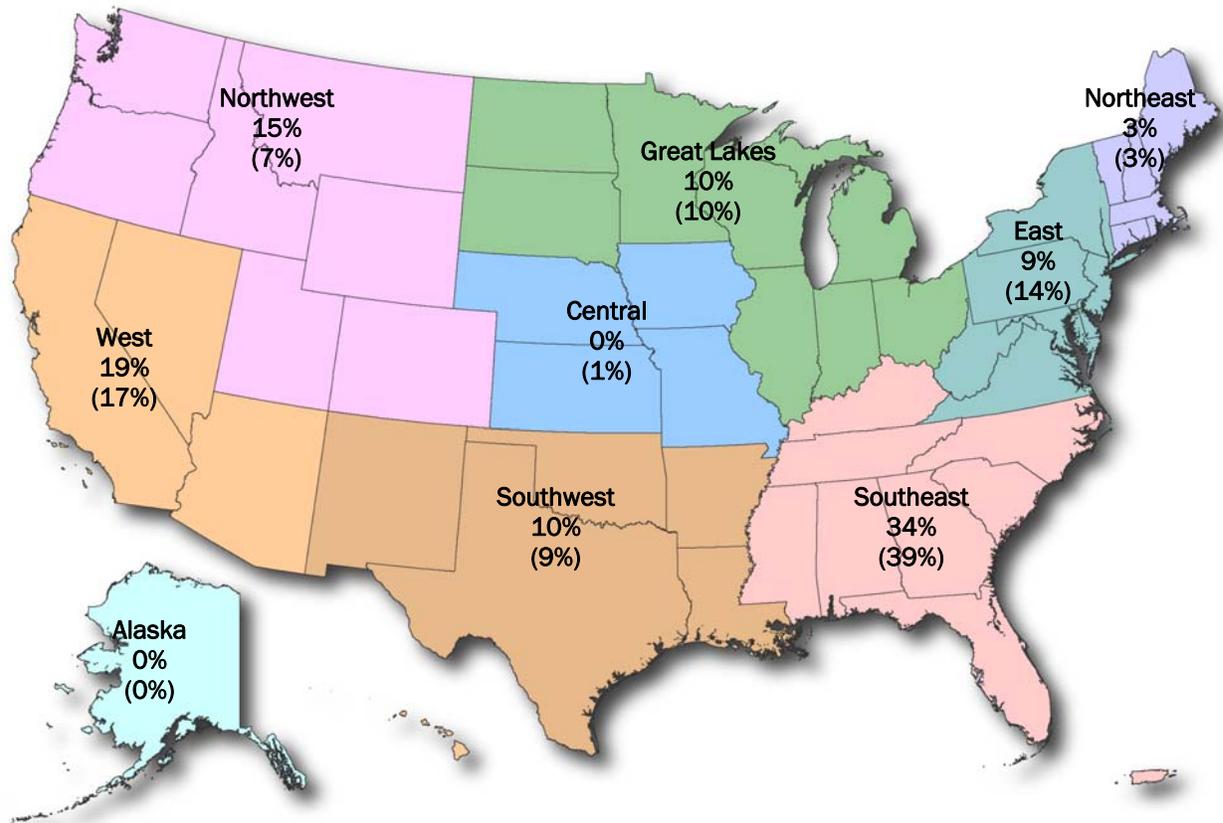


Source: 2006 Passenger Survey

4. In what state is your final destination for today's trip?

Information on travel patterns was requested as part of this survey to ensure the validity of the survey results. Travel patterns identified by survey respondents, while somewhat different, are comparable to travel patterns reflected in US DOT data. This finding helps to ensure the validity of the survey sample. **Exhibit 3-63** shows final destination regions for passengers departing from The Quad City International Airport as reporting by passenger responding to this study's passenger survey. Locations in the Southeast were the most popular, due largely to the popularity of destinations in Florida, which individually accounted for 20 percent of the total trips reported. Regional travel patterns recorded as part of this study's passenger surveys were compared to regional travel patterns for the airport obtained from US DOT data for the airport. US DOT travel patterns represent one year of data; this study's passenger survey results reflect travel patterns on the days the surveys were completed. As a result, some difference in the two results can be expected.

Exhibit 3-63
Final Destination Regions for Passengers at
Quad City International Airport



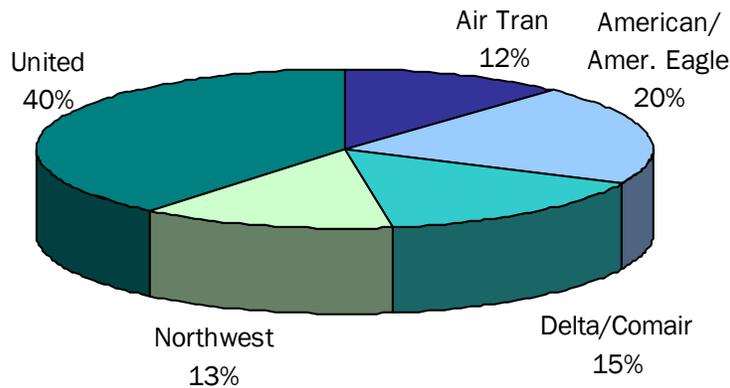
Sources: 2006 Passenger Survey; () = Regional Travel as Reported by US DOT (YE June 30, 2006)



5. What airline are you flying today?

The Quad City International Airport collects passenger data by airline from each carrier serving the airport. The information was gathered for the passenger survey to ensure an appropriate cross-section and sample of survey responses.

Exhibit 3-64
Air Carrier Usage
Quad City International Airport



Source: 2006 Passenger Survey

6. What is the number one reason you chose this flight today?

Table 3-64
Reasons for Choosing Flight
Quad City International Airport

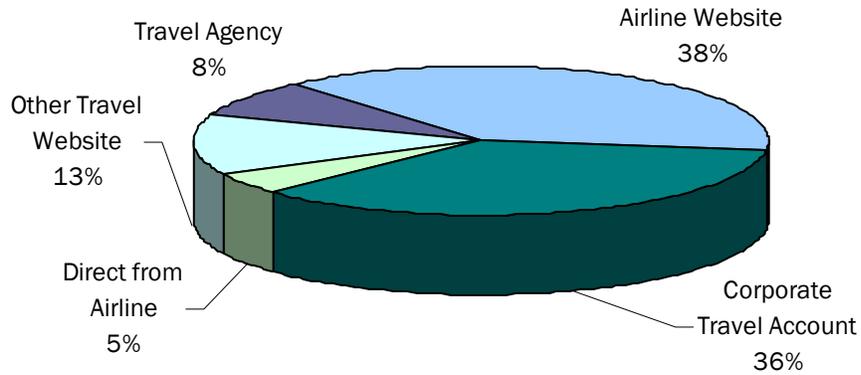
Reason	% of Respondents
Flight Schedule	34%
Air Fare	29%
Frequent Flyer Program	8%
Nonstop Flight	7%
Destination Offered	6%
Only Option Available	4%
Other	12%

Source: 2006 Passenger Survey



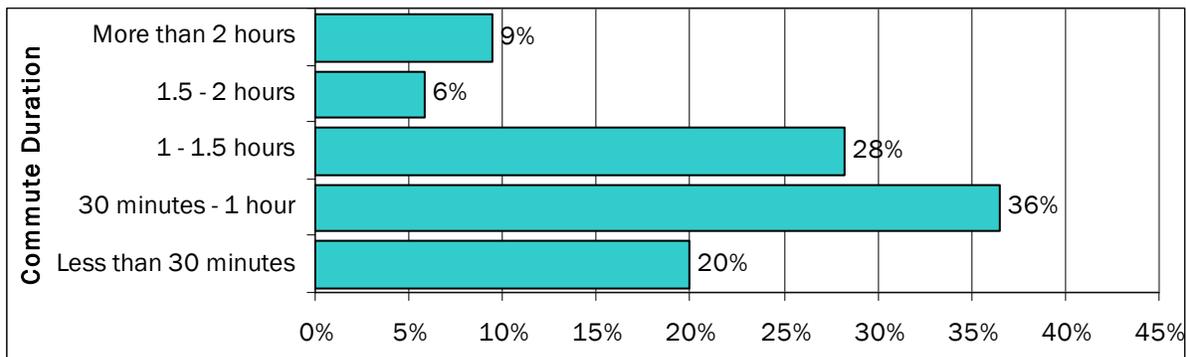
7. How was your ticket for today's trip purchased?

**Exhibit 3-65
Method of Ticket Purchase
Quad City International Airport**



8. How long did your trip to the airport take?

**Exhibit 3-66
Travel Time to Airport
Quad City International Airport**



Source: 2006 Passenger Survey



9. *On a scale of 1 to 5, with 1 being poor and 5 being excellent, how would you rate your overall experience with the following airport services and amenities?*

**Table 3-65
Service and Amenities Ratings
Quad City International Airport**

Rank	Category	Average Rating
1	Restrooms	4.01
2	Ticket Counter/Lobby	3.94
3	Security Experience	3.93
4	Restaurants/Bar	3.85
5	Clarity and Usefulness of Signage	3.77
6	News & Gifts	3.69
7	Parking	3.62
8	Departure Gate Area	3.53
Source: 2006 Passenger Survey		

10. *On a scale of 1 to 5, with 1 being not important and 5 being very important, please indicate how important each of the following factors are when choosing a departure airport:*

**Table 3-66
Importance of Factors When Choosing a Departure Airport
Quad City International Airport**

Rank	Category	Average Importance
1	Reliability of Airline Service	4.52
2	Nonstop Service to Desired Destination	4.24
3	Airline Fares	4.21
4	Proximity of Airport to Work/Home	3.88
5	Frequency or Schedule of Flights	3.79
6	Choice of Airline	3.53
7	Aircraft Size	3.28
8	Faster, Easier Security Clearance	3.18
9	Passenger Terminal Amenities/Food/Baggage	3.15
10	Frequent Flyer/Mileage Program	2.93
11	Cheaper or Free Parking	2.40
Source: 2006 Passenger Survey		



11. Please help us to understand your driving versus flying decisions:

a. What is the minimum difference in round trip airfares that will cause you to drive to an alternate airport to begin the air portion of your trip?

Table 3-67
Minimum Round Trip Airfare Savings that Will Cause Passengers to Drive to Alternate Airport Quad City International Airport

Minimum Fare Savings	% of Respondents
<\$100	8%
\$100-\$199	22%
\$200-\$299	43%
>\$300	27%
Average- All Respondents	\$211
Source: 2006 Passenger Survey	

b. Is there a maximum drive time that you are willing to drive to an alternate airport to begin the air portion of your trip?

Table 3-68
Maximum Drive Time Passengers are Willing to Drive to Use Alternate Airport Quad City International Airport

Maximum Driving Time	% of Respondents
<60 min	0%
60 min-119 min	36%
120 min- 179 min	38%
>180 min	26%
Average- All Respondents	118 minutes
Source: 2006 Passenger Survey	

c. Do you check the price differences from this airport versus the alternate airport before making your purchase decision?

Table 3-69
How Often Passengers Noted that the Check Prices from Alternate Airports Quad City International Airport

Frequency	% of Respondents
Always	16%
Sometimes	49%
Never	35%
Source: 2006 Passenger Survey	



12. Please estimate the total number of airline trips that all members of your household took in the last 12 months

The number of reported trips by household for Quad City International Airport helps to establish a relative propensity of a region to use airline travel.

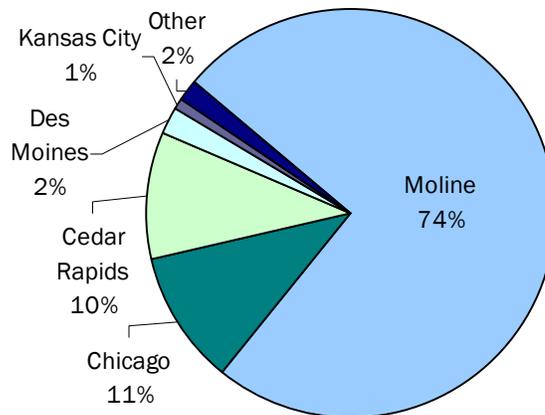
Table 3-70
Average Annual Airline Trips per Household
Quad City International Airport

Category	Number of Airline Trips per Household
Business	7.1
Leisure/Personal	2.7
Total	9.7
Source: 2006 Passenger Survey	

13. When you took an airline trip, what percentage of your trips in the last year were from this airport as opposed to other airports?

Responses to this question largely favored The Quad City International Airport (see **Exhibit 3-67**) with passengers reporting that 74 percent of their air travel begins this airport. This indicates that passengers that use Quad City International are often repeat customers and/or favor using the local airport for its convenience.

Exhibit 3-67
Percentage of Flights Beginning at MLI and Other Airports
Quad City International Airport



Source: Wilbur Smith Associates



14. What could this airport do to improve your travel experience?

The most common suggestion for Quad City International Airport was to increase the number of direct flights and destinations originating at the airport. Another common suggestion was to improve the general level of customer service, and to add more food options at the airport. Other responses included the following:

- Improve the terminal appearance
- Increase the accessibility to wireless internet
- Add more airlines
- Add additional parking

SUMMARY

Information gathered through passenger and business surveys and through the parking lot inventories provides a wide range of base data to support subsequent portions of this study's analysis. Information presented in this chapter will be used to support strengths, weaknesses, opportunities, and threats (S.W.O.T.) analysis for each of the eight commercial airports in Iowa. This information will ultimately be used to help formulate individual action plans for these same airports. Information obtained from these data collections efforts will also be used to help define airport market areas, estimate total air travel demand associated with each county in Iowa, and determine which airports are currently serving the demand associated with each Iowa county. This analysis is presented in the next chapter of this report.