



Passenger Survey – 2019

Final Analysis

Survey Response:

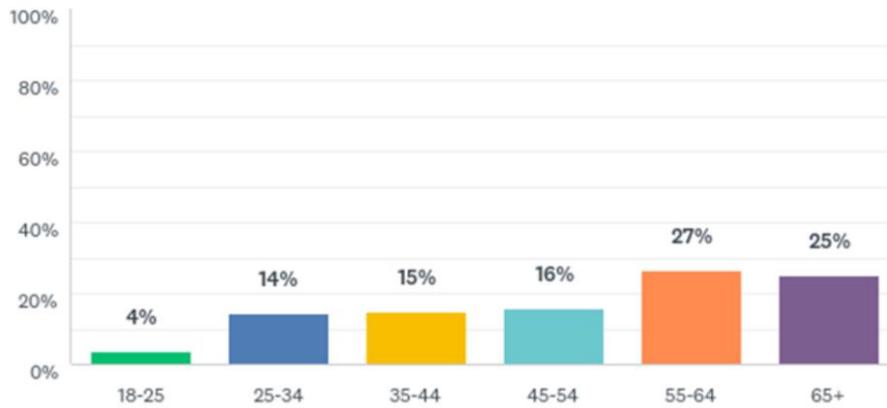
Total survey responses: 4,076

- Respondents that flew 2+ times: 2,686
- Respondents that flew 5+: 1,073
- Respondents that flew 8+: 541
- Respondents that flew 11+: 345



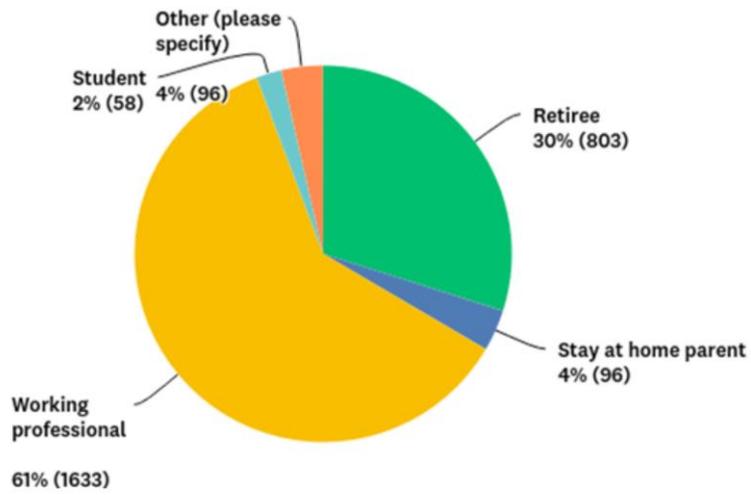
*For the remainder of this analysis, responses are compiled from those that flew 2+ times to/from ILM in the past 12 months

Q2: What is your age group?

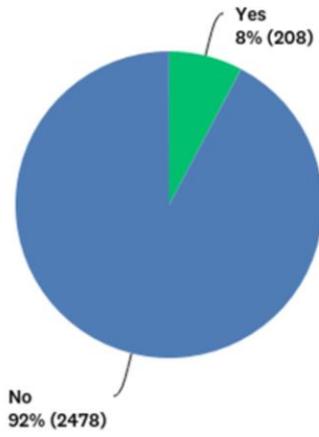


For our most frequent travelers (11+ times/yr) there was an increase in those in age groups 45-54 and 35-44, as well as a decrease in those 64+.

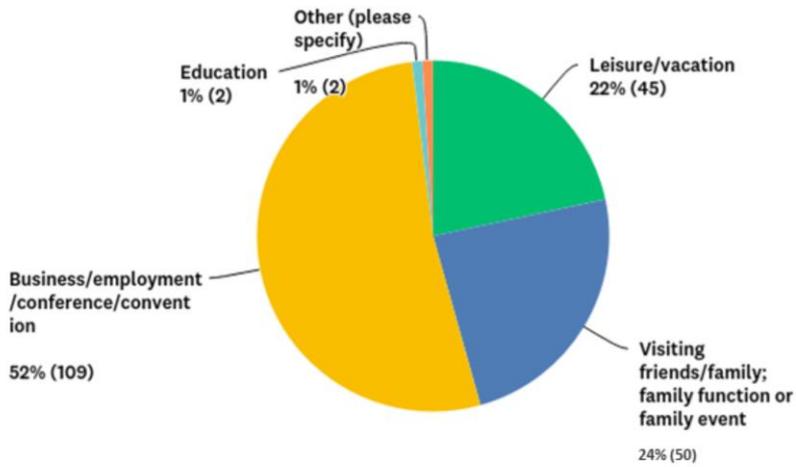
Q3: Which of the following best describes you?



Q4: Are you flying from ILM today?



Q5: (IF Flying from ILM today) What is the main reason for your travel today?



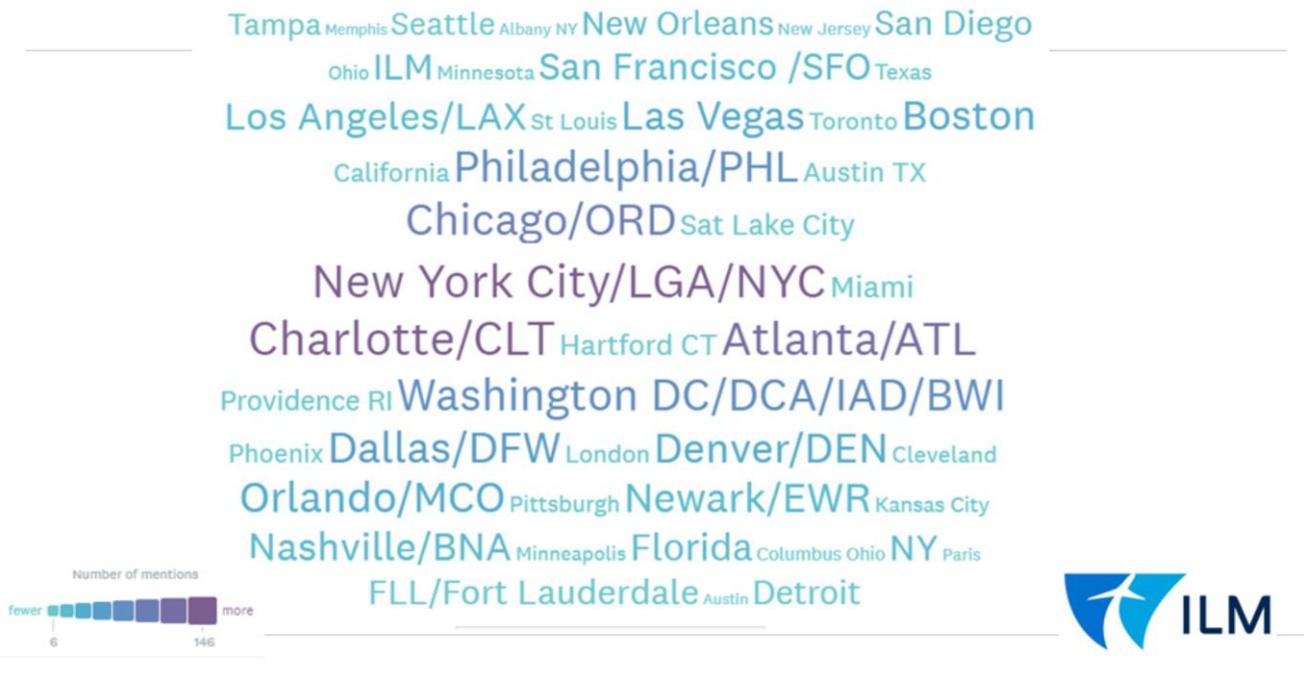
There were 208 people total that were flying from ILM “today” that responded to this question.

Q6: (IF Flying from ILM today) In which city or town will you spend tonight?

Leland_{ILM} Albany_{ny} Nashville Atlanta_{Denver} Chicago
NY Wilmington_{NYC} New York_{Home} Philadelphia
Boston

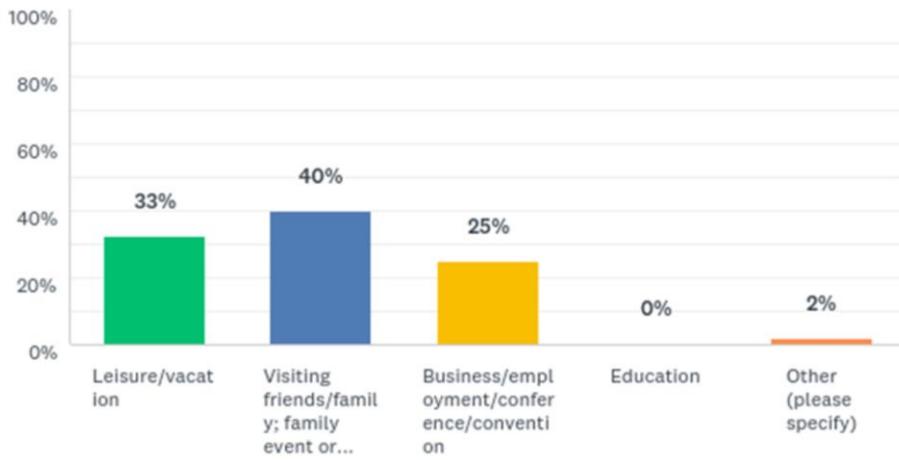


Q7: Where Did You Last Fly from ILM?

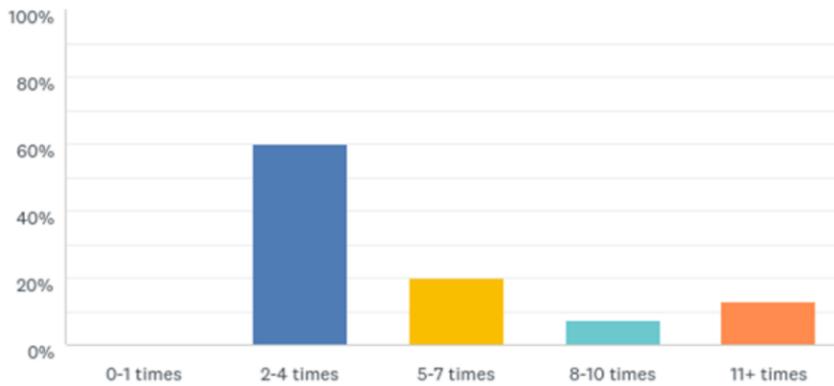


Some destinations were combined based on similarities.

Q8: What was the main reason for your travel the last time you flew from ILM?



Q9: How often have you flown to/from ILM in the past 12 months?

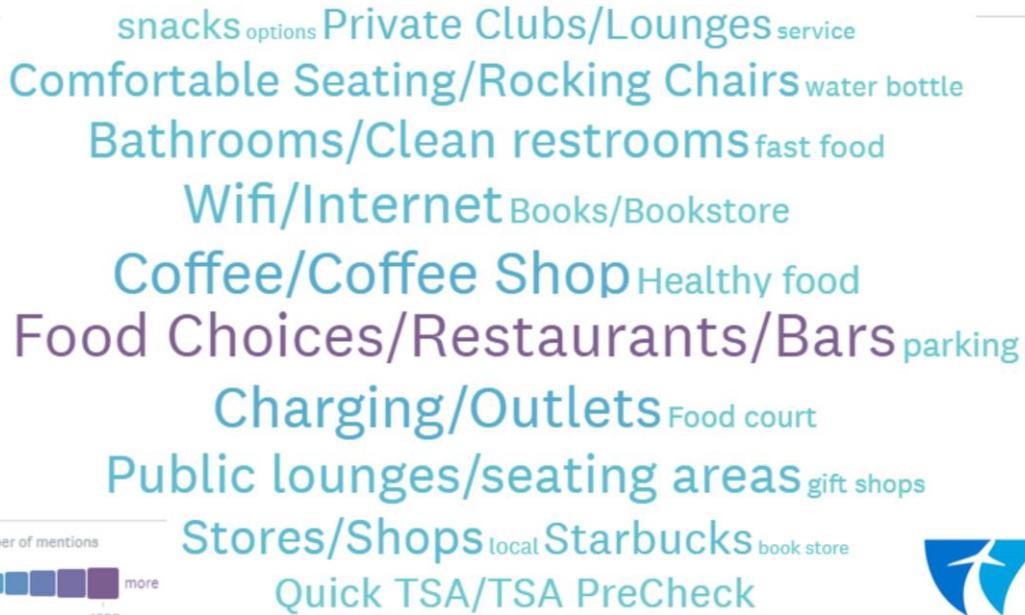


**Reminder, data analyzed & displayed for this dataset was specific to survey respondents that flew 2+ times in the past 12 months)*



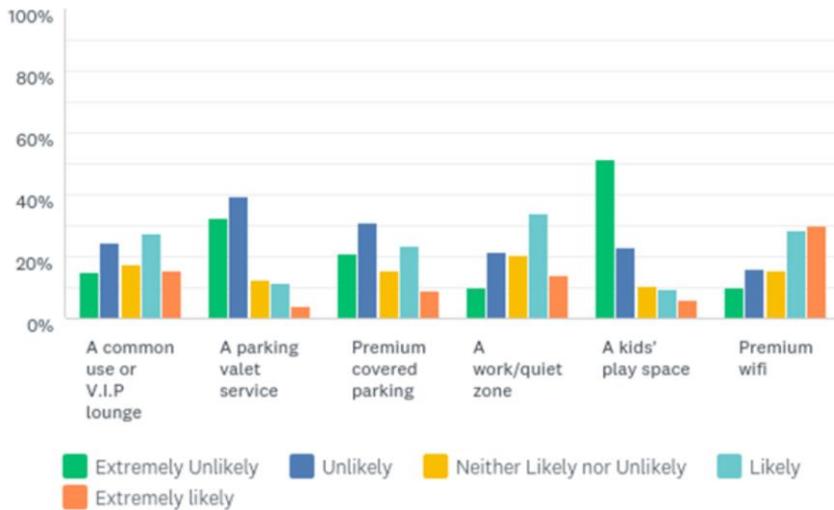
2-4 times (60%), 5-7 times (20%), 8-10 times (7%), 11+ times (13%)

Q10: What Are Some of Your Favorite Airport Services/Amenities that you use when traveling through Airports? (nationally or internationally?)



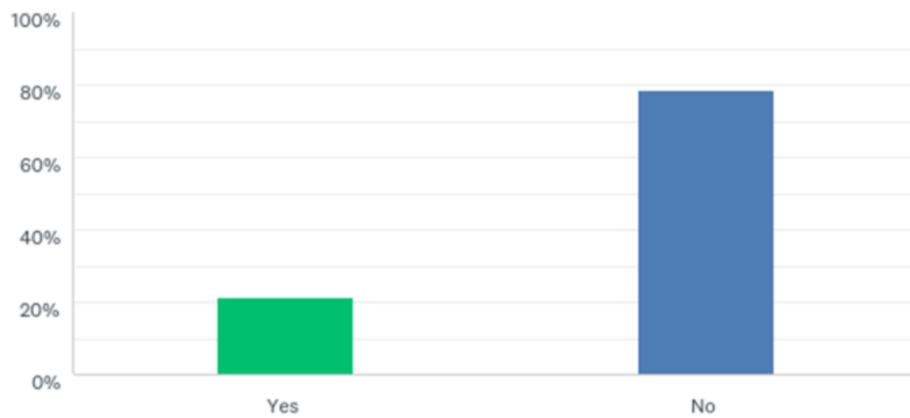
Top mentions were: **Food Choices/restaurants/bars, Charging/Outlets, Coffee/Coffee Shop.** Followed by public lounges/seating areas.

Q11: While traveling through ILM how likely are you to use:

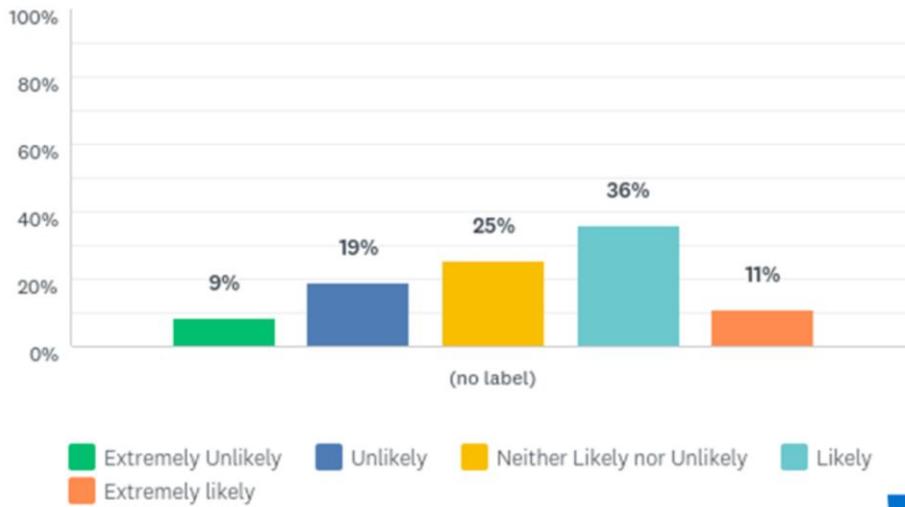


When adding together likely/extremely likely: **Common Use of VIP Lounge (43%),** Parking Valet (15%), Premium Covered Parking (32%), **A Work/Quiet Zone (48%),** A Kids' Play Space (15%), **Premium Wifi (59%)**

Q12: Do you currently own or plan to own (in the coming years) an electric or hybrid vehicle?



Q13: (Those that plan to own....)How likely are you to utilize an electric car charging station when parking at ILM?



Q14: For food and beverage concessionaires at ILM, which of the following options are you most likely to patronize?



Those that flew 11+ times to/from ILM in the past 12 months selected a local business (62%) as the option they were most likely to patronize.

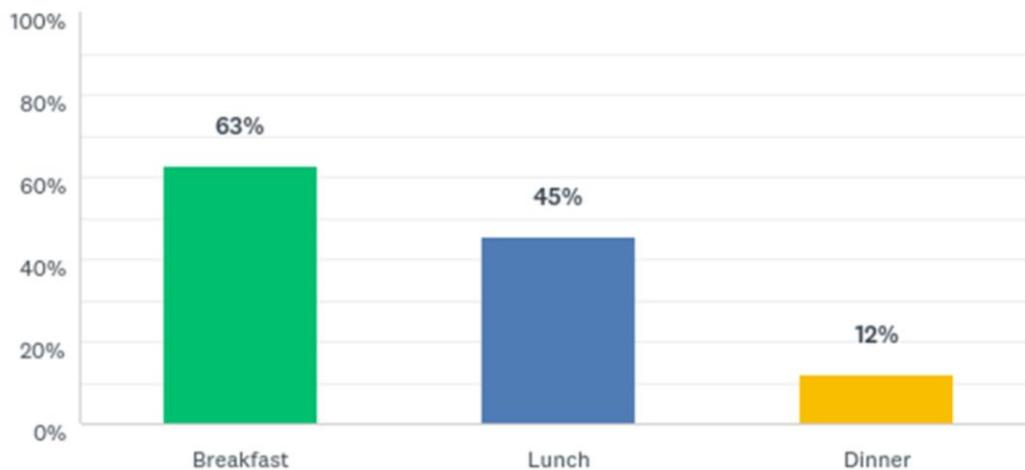
Q15: Which of the below food & beverage options would you prefer to have at ILM? (Rate from #1 top choice to #3 bottom choice)

	1	2	3
Sit Down Restaurant	36.86% 973	27.54% 727	35.61% 940
Grab & Go 	40.49% 1,069	37.39% 987	22.12% 584
Fast Food	22.65% 598	35.08% 926	42.27% 1,116



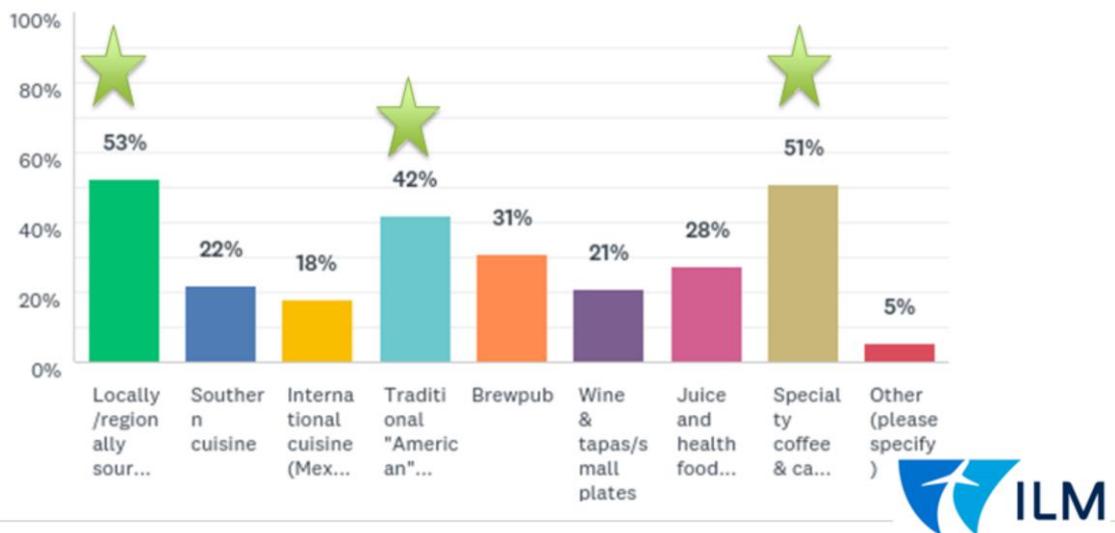
Top Choice was grab & go followed by sit down restaurant.

Q16: Which meal are you most likely to purchase at an airport?



Breakfast may be a big opportunity area for ILM, especially since numerous morning flights have been added. Those that traveled most frequently (11+ times to/from ILM in the past 12 months) selected breakfast (69%) as the meal they are most likely to purchase at an airport.

Q17: What type of menu would you prefer to see at a food/beverage concessionaire at ILM? (Please check your top 3 choices.)



Top choices included: Locally/regionally sourced and/or Farm to Table, Specialty Coffee & café items such as baked goods or sandwiches, Traditional “American” (burgers, pizzas, sandwiches, salads etc) There was also some interest in a (local) brewpub. Those that travelled 11+ times to/from ILM in the past 12 months selected Locally/regionally sourced and/or Farm to Table (56%), Specialty Coffee & café items such as baked goods or sandwiches (42%), brewpub (34%) and Traditional “American” (burgers, pizzas, sandwiches, salads etc) (31%).

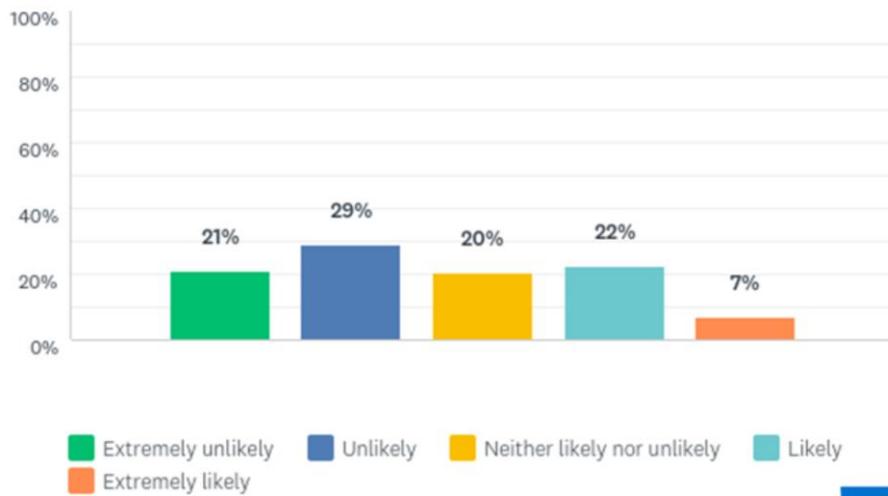
Q18: What Restaurant Would You Love to See at ILM?

McDonalds brewery Fork n Cork Mexican PT's Grille fresh
Flaming Amy's pizza K38 coffee shop Chipotle Slice Life
Cape Fear Seafood Beach Bagels Panera Islands
Local/Local Restaurant/Local Coffee
Seafood Port City Java Jersey Mikes Chick-fil-A
Burger Starbucks Chili's Bojangles options
Front Street Brewery Bitty Beaus Dunkin Donuts
bagel Copper Penny chain Cast Iron Kitchen Subway
Panera Bread Fork Cork Sweet Savory McDonald s
Carolina Ale House Coffee

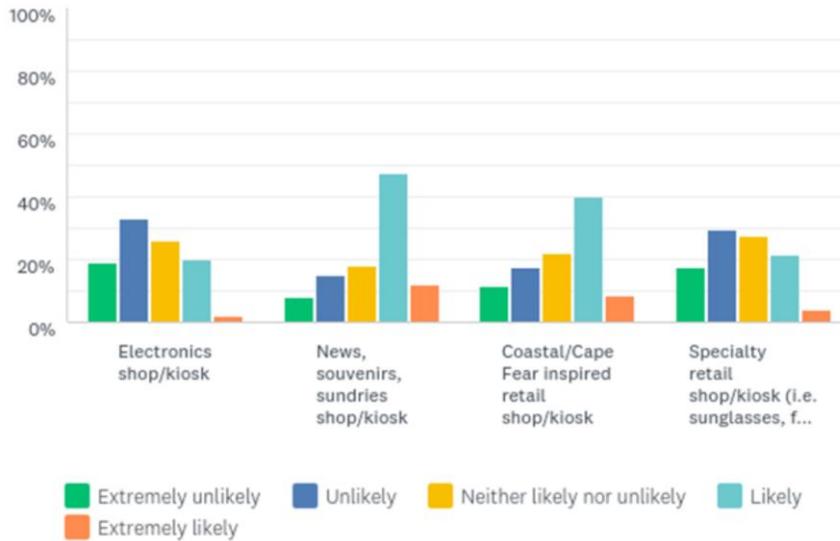


Top places mentioned included: Chick-fil-a, Port City Java, Starbucks, and Local Restaurant (in general).

Q19: How likely are you to order food in advance from an airport concessionaire (i.e. via an app), and then have it delivered to your gate at ILM?



Q20: How likely are you to patronize the following retail?



When combining extremely likely and likely: Electronics Shop/kiosk (22%), **News/souvenirs/sundries shop or kiosk (59%), Coastal/Cape Fear inspired retail (49%),** Specialty retail (flip flops/sunglasses/jewelry/makeup) (26%). There was a decrease in likeliness to patronize retail for our most frequent travelers.

Q21: What Retail Would You Love to See at ILM?

Electronics Palmetto Moon Gift shop Brighton Hudson News Anything

clothing Walgreens Coastal/Cape Fear/Beach

surf shop Unsure/NA/Nothing Particular

Blue Moon Books/Magazines Cvs

None/Don't Need/Not Interested

Sundries/Sundries Shop

Local (local art/local gifts/local store)

Wilmington News/Newsstand gifts

Don't Shop at ILM/Don't Usually Shop at

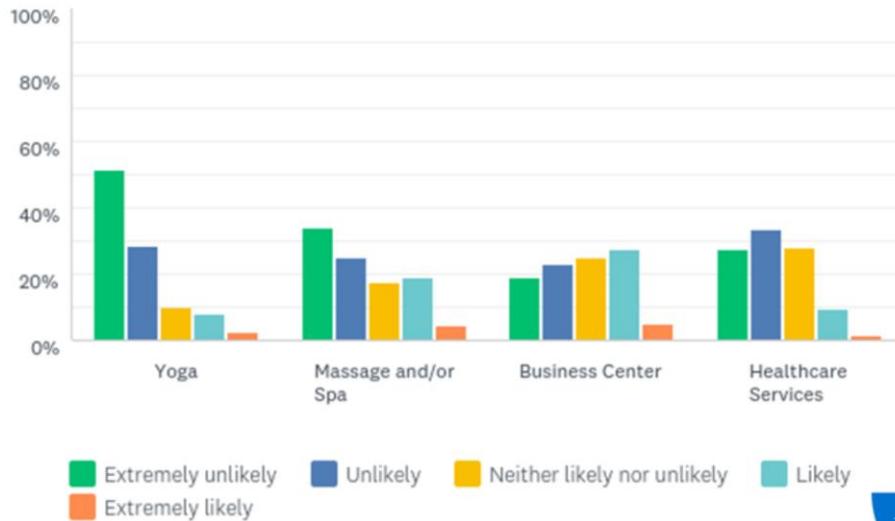
Airports

Barnes Noble souvenirs Snacks Redix Top Toad retail Brookstone travel



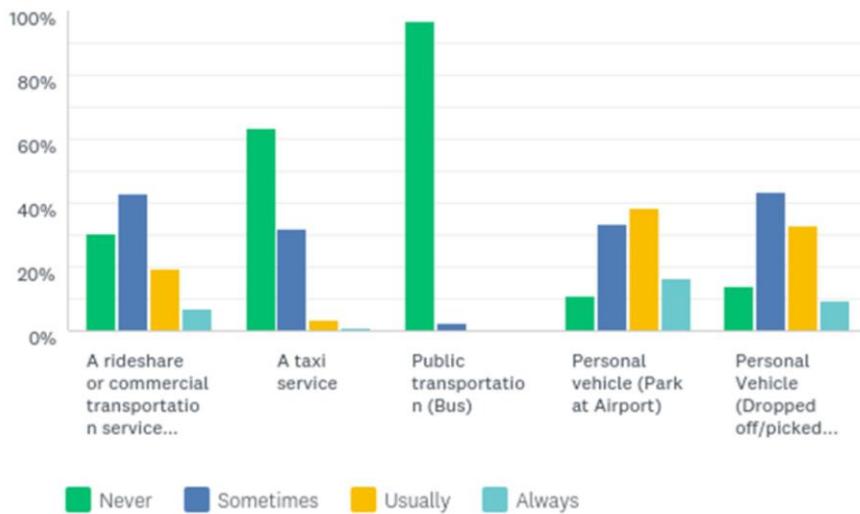
Top responses were: **Local (local art/local gifts/local store)** and **None/Don't Need/Not Interested**. These were followed by Books/Magazines.

Q22: How likely are you to patronize the following services at ILM?



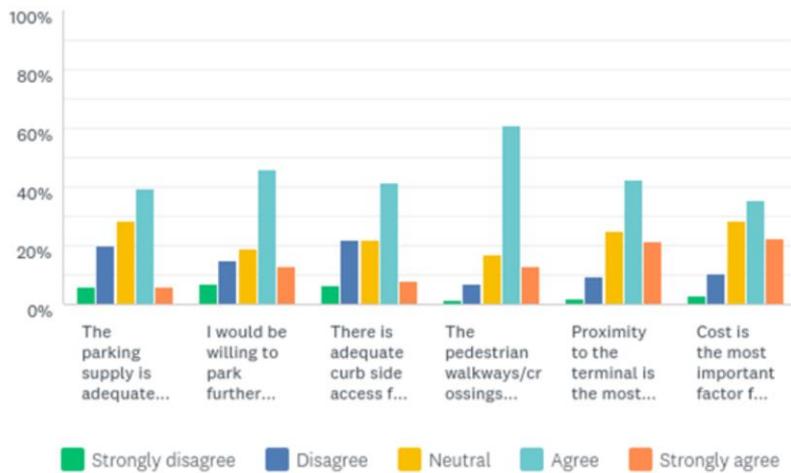
When combining extremely likely & likely Yoga (10%), Massage/Spa (23%), Business Center (**33%**), Healthcare Services (11%). Most categories had similar responses for those that traveled to/from ILM most frequently, except the likeliness of patronizing a business center which increased.

Q23: While traveling to/from ILM how often do you use:



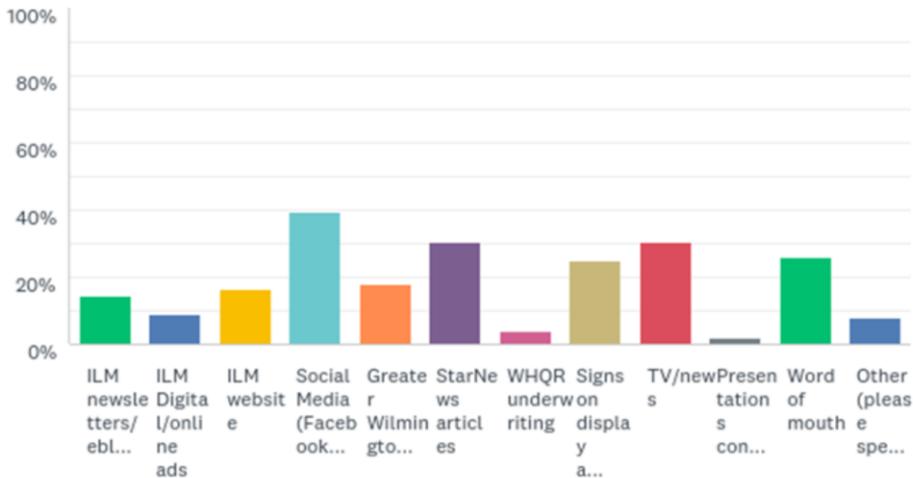
When combining usually/always: rideshare/commercial transportation-Lyft/Uber (26%), taxi (5%), public transportation-bus (<1%), **personal vehicle and park @ILM (55%), personal vehicle dropped off/picked-up (43%)**

Q24: Please rate the degree to which you agree or disagree with the following statements:



Strongly agree & Agree combined = The parking supply is adequate at ILM (46%), I would be willing to park further away from the terminal if there was shuttle service to the terminal at ILM (59%), There is adequate curbside access for the arrival/departure curb at ILM (50%), The pedestrian walkways/crossings provide safe and convenient access to the terminal at ILM (74%), Proximity to the terminal is the most important factor for my choice of parking at ILM (64%), Cost is the most important factor for my choice of parking at ILM (58%)

**Q25: How have you been made aware of ILM's terminal expansion?
(Please select all that apply)**



Respondents could click all that apply. Overall, respondents heard about the terminal expansion in a variety of ways. **Top choices included: social media, star news articles, tv news coverage, word of mouth, and signs on display at the airport.** “Other” often included conversations with staff as well as seeing the expansion progress while at ILM. Our most frequent travelers heard about the expansion through signs on display at ILM, social media, word of mouth, StarNews articles, ILM’s website, ILM’s e-blasts, and the Greater Wilmington Business Journal.