



## **Aviation Technical Subcommittee Highlights of the September 26, 2024, Meeting**

### **Meeting Participants:**

- Shawn Ames, Maryland Aviation Administration, (MAA)
- Kevin Clarke, Maryland Aviation Administration, (MAA)
- Mark Williams, Maryland Aviation Administration, (MAA)
- Glen Warren, Metropolitan Washington Airports Authority, (MWAA)
- Rusty Harrington, Virginia Department of Aviation, (DOAV)
- Mark Rawlings, District Department of Transportation, (DDOT)

### **TPB Staff:**

- Tim Canan
- Kenneth Joh
- Suraj Vujjini
- Olga Perez
- Zhuo Yang

### **1. WELCOME, INTRODUCTIONS, AND APPROVAL OF HIGHLIGHTS FROM PREVIOUS MEETING (MAY 23, 2024)**

Mr. Tim Canan called the meeting to order at 10:32 A.M. The meeting was conducted virtually by Microsoft Teams teleconference. The highlights of the previous meeting, held May 23, 2024, were approved by the Subcommittee, as written.

### **2. STAFF ANNOUNCEMENTS**

Mr. Tim Canan reported to the Subcommittee that there have been no staffing changes at COG. He further noted that, as the July Aviation Technical Subcommittee meeting was canceled, the highlights presented are from the May meeting. Additionally, Mr. Canan informed the Subcommittee that the FAA AIP grant for CASP 35 is in the process of closing, while the AIP grant for CASP 39, which will support the upcoming 2025 Air Passenger Survey as well as the 2025 Ground Access Travel Time Update, has been awarded.

### **3. 2023 WASHINGTON-BALTIMORE REGIONAL AIR PASSENGER SURVEY**

Dr. Kenneth Joh presented an update on the Regional Air Passenger Survey General Findings Report focusing on how the feedback from the subcommittee members was addressed. Dr. Joh thanked the subcommittee members for their valuable input on enhancing the report's clarity and readability. Rather than going through the entire report, he provided a focused summary of addressed comments and ongoing revisions. The team has already made corrections, including editorial fixes and improvements to chart readability and content clarity, such as acknowledging FAA funding and updating references to charts and tables in the executive summary.

Comments received have been categorized by complexity and level of effort. Basic corrections have been fully addressed, while more complex items, such as data sourcing for specific tables and refinements in data categories (e.g., combining walk and bike responses), were either resolved or identified for further revisions. Dr. Joh clarified discrepancies between the initial and

final response counts, explaining the criteria for valid survey responses and noting updates to descriptions of the methodology, like parking and strata definitions.

The presentation concluded with a plan of upcoming work, noting that future reports will include a Geographic Findings Report by year-end. The team anticipates that the final General Findings report will be ready in the coming weeks.

Mr. Rusty Harrington congratulated Mr. Canan, Dr. Joh, and their team, highlighting that this is one of the best drafts he has reviewed in a long time.

#### **4. AIR CARGO ELEMENT UPDATE**

Ms. Olga Perez provided an update on the current state of the Air Cargo Element Update. Ms. Perez introduced the current phase of the Regional Air Cargo Study, providing an overview of its purpose and a tentative outline for the final report. This updated study, building on previous analyses from 1997, 2008, and 2015, focuses on examining regional cargo facilities' capacities to accommodate projected air cargo demand growth. Ms. Perez reviewed completed phases, including data collection and initial data analysis, and outlined the organization of data into tables and figures, with a specific focus on including an e-commerce impact analysis in response to growing trends in that sector.

In his discussion of data sources, Ms. Perez highlighted the types of information collected to date, including data on cargo distribution across the region (excluding DCA due to minimal cargo volumes), historic trends, and the types of commodities handled. She requested assistance from subcommittee members for additional, detailed information by airport on cargo-specific data, such as airport-level commodity statistics, inbound/outbound data, and cargo handling related to e-commerce. These data are essential for completing an accurate analysis of regional demand and airport contributions, as well as forecasting needs for future infrastructure planning.

Finally, Ms. Perez reviewed the next steps, explaining that once data analysis is complete, the team will draft the report and develop recommendations based on the findings. She noted the importance of securing specific data from airports and other key sources to ensure accuracy and alignment with airport operations. Ms. Perez concluded by inviting questions, feedback, and any guidance on obtaining the remaining data to support the study's goals.

Mr. Canan expressed gratitude to Ms. Perez and the airport partners for their support in the air cargo study. He clarified the team's need for underlying data supporting a graphic provided by Mr. Glen Warren, which could enable more precise calculations. While they can approximate growth factors independently if needed, they would prefer the actual source data, if it is readily accessible. Regarding e-commerce, Mr. Canan noted the availability of national trends and general forecasts, which could be qualitatively adapted to reflect unique differences between regional airports like BWI and DCA. However, if any additional resources or specific data sources are available, the team would appreciate guidance.

Mr. Warren acknowledged the request and stated that he would make efforts to gather the necessary information. He also asked for a detailed list of the specific data required to ensure all needs are accurately addressed.

Mr. Shawn Ames highlighted the need for comprehensive data to respond effectively and noted that while he shared a forecast on BWI's cargo activity, it omits data on e-commerce. He expressed concerns about the data being outdated and emphasized the importance of analyzing current cargo trends.

Mr. Canan stated that the team intends to conduct updates more frequently moving forward, recognizing the rapid changes in the air cargo landscape post-pandemic. He mentioned plans to repeat the ground access travel time study and air cargo updates sooner than the previous intervals to ensure they stay current with evolving trends.

Dr. Joh asked if e-commerce data is available by airport, highlighting its significance for updating the air cargo element due to the substantial impact of e-commerce.

Mr. Ames indicated that while Amazon likely handles most e-commerce freight, he is unsure about the specifics of other carriers' contributions at each airport, as the airport no longer has a dedicated cargo expert. He noted that there may be industry-wide percentages related to e-commerce, but detailed airport-level data is not available.

Mr. Warren acknowledged his lack of expertise in cargo and mentioned that he would need to consult with someone in his department to find the necessary information. He expressed a willingness to track down the data, recognizing that it might be challenging to locate the right person who holds the information.

Mr. Canan emphasized that Ms. Perez has most of the information needed for the report, but a few gaps remain. He requested assistance in obtaining any missing data or guidance on who might have it, reassuring that they would be resourceful in closing those gaps, even if it required qualitative analysis.

Mr. Ames highlighted the differing profiles of the airports, emphasizing Dulles's significant international cargo and BWI Amazon's operations.

## **5. 2023 AIR PASSENGER SURVEY (APS): COLLABORATIVE DISCUSSION**

Mr. Canan mentioned that although there is no formal presentation, the discussion aims to review the experiences from the last Air Passenger Survey, highlighting the involvement of new personnel in the process and new procedures and methods for the Air Passenger Survey, engaging with the subcommittee for guidance throughout the process. He opened the floor for discussion on the overall experience, inviting feedback on what worked well, areas for improvement, and how the survey program can better meet the subcommittee's needs moving forward.

Mr. Warren inquired whether there would be a need for a pretest survey, similar to the previous one, or if they would proceed directly with the survey in October.

Dr. Joh responded that a pretest might not be necessary if they stick to a similar methodology as before. However, if there are significant changes to the sampling strategy or survey approach, a pretest may be warranted, and they would determine the need for it once the methodological approach is finalized.

Mr. Ames pointed out that each grant usually requires rebidding the contract, implying different contractors may be involved, and suggested that if the same contractors were used, a pretest might be less necessary.

Mr. Canan explained that while they had the same contractor previously, a new contractor was chosen due to significant changes in their methods and approach, but that contract was canceled for convenience because of initial concerns about the contractor's capacity. Instead, they issued a task order to ICF, the on-call contractor, who supported the survey operations effectively, and he mentioned they could either continue with a task order or consider a competitive RFP for the next survey, inviting feedback on the preferred approach.

Mr. Ames asked how many people started the application or took a scan card but failed to complete it, particularly those using a phone who might have intended to return later. He sought insights into any data regarding these incomplete initiations.

Dr. Joh noted that approximately 18,000 people initiated the survey, though many may not have completed it. He explained that while most questions could be skipped, three essential questions were designed to reappear for those interested in participating in the gift card raffle.

Mr. Warren asked for the percentage of survey completions via personal devices, questioning if the data indicated a shift towards digital methods over face-to-face surveys.

Dr. Joh noted that while interviewers offered tablets for survey completion, most passengers preferred to scan the QR code and take the survey on their personal devices. For those unwilling to participate immediately, interviewers provided business cards with QR codes for later access.

Ms. Perez highlighted that most passengers who used the tablets for the survey did so because they struggled with QR codes on their personal phones, often due to age-related challenges like difficulty reading small text on screens. She noted that this was particularly common among the older population.

Mr. Canan remarked on the significant change in survey participation over the decades, noting that previously, many respondents who took paper surveys did not return them, even with mailing options. He expressed satisfaction with the current electronic survey's response rate, attributing this success partly to the incentive offered for participation.

Dr. Joh emphasized the importance of incentives in improving response rates for surveys, particularly considering declining trends in participation. He noted that conducting airport surveys has become more challenging as passengers often arrive at the gate at the last minute or prefer to wait in lounges, making it difficult for interviewers to reach them.

Mr. Canan concluded by praising his team, especially Olga and Suraj, for their outstanding work on the survey. He highlighted Olga's rapid adaptation after joining just two months before the fieldwork and praised Suraj for updating old analytical scripts, ensuring the successful execution and analysis of the survey.

## **6. ROUNDTABLE DISCUSSION**

Mr. Warren provided an overview of ongoing developments at DCA, where construction will soon begin on a new temporary parking deck in the economy lot, adding 1,400 additional parking spaces. This initiative is part of an 8-year program aimed at reconstructing roadways and expanding parking options. He also mentioned the new Concourse E at Dulles, which is expected to be operational by September 2026. To improve traffic flow, the team is exploring new technologies to monitor curbside usage and address ongoing roadway challenges.

Mr. Ames reported that BWI recently experienced its highest passenger volume ever, surpassing 27 million passengers by the end of June, a milestone not reached before the pandemic. Although a slight decline is expected as the year ends, optimism remains for a rebound next year. He highlighted significant construction work on the baggage handling system between Terminals A and B, a project valued at approximately \$400 million, set to be completed next year. Additionally, he noted that BWI secured a \$1 million grant to facilitate the demolition of its hourly garage and develop a new ground transportation center to enhance the flow of ground transport services.

Mr. Harrington shared that the Virginia Airport Operators Council held its annual conference recently, during which Keith Merlin received the Director's Award for his contributions to aviation in the state. He also announced the receipt of a grant offer from the FAA for an economic impact study of public-use airports, which is an exciting development. Furthermore, Mr. Harrington discussed ongoing efforts in sustainable aviation fuels, noting that Virginia was selected for a FAST SAF grant. This initiative aims to investigate the production of sustainable aviation fuel in Southwest Virginia, intended to serve Dulles Airport, thus paving the way for potential private sector involvement in the future.

## **7. ADJOURN**

The meeting was adjourned. The next Subcommittee meeting is scheduled for November 21, 2024. It will be held virtually.