



2023 WASHINGTON-BALTIMORE REGIONAL AIR PASSENGER SURVEY

General Findings from the Data

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TPB Community Advisory Committee
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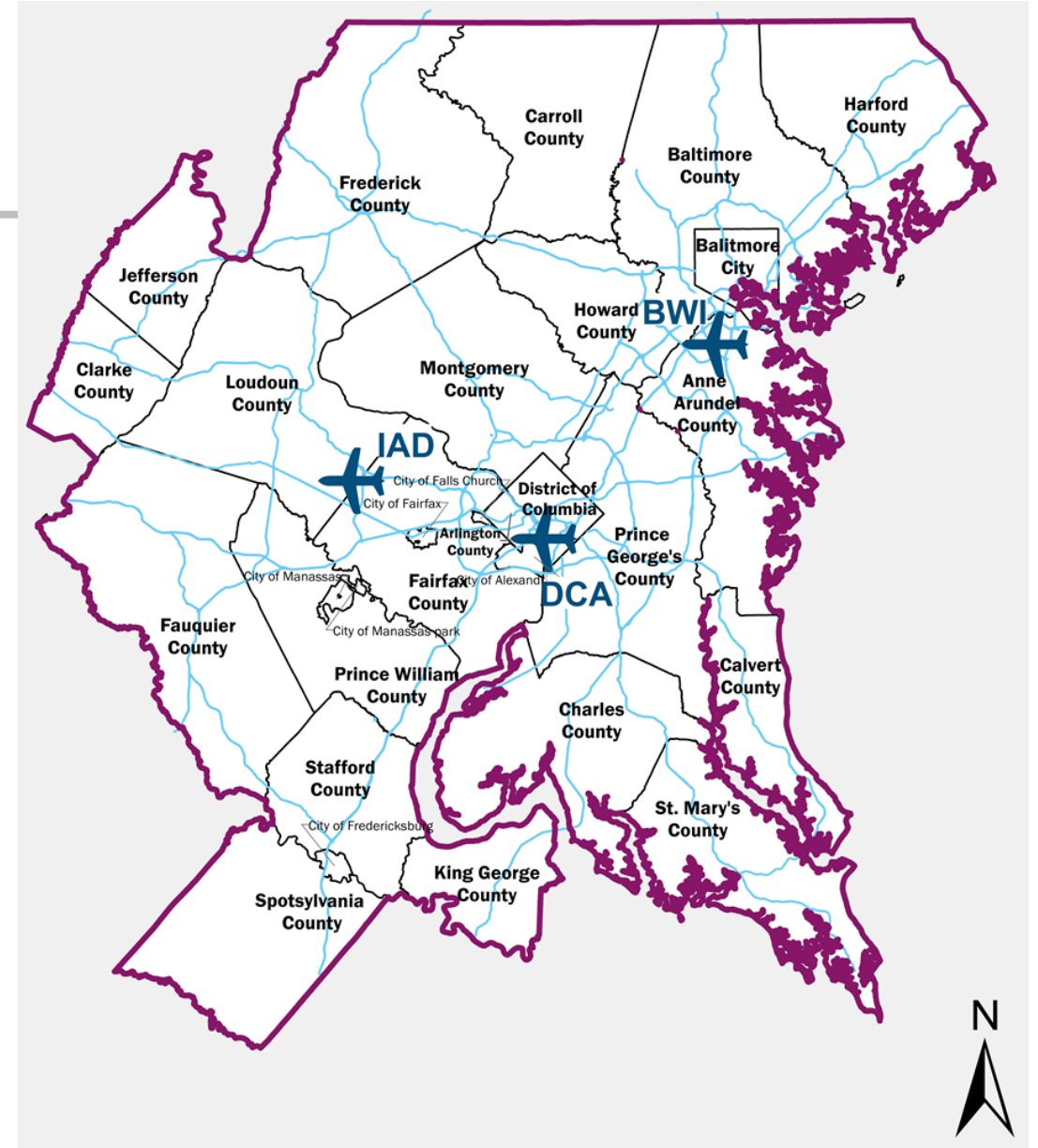
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Washington-Baltimore Air Systems Region at a Glance

The Washington-Baltimore Air System Planning Region (ASPR) stretches from the Pennsylvania border to the north to Spotsylvania County, VA, to the south, and from the Chesapeake Bay in the east to the Shenandoah Valley to the west.



REGIONAL AIRPORT SYSTEMS PLANNING

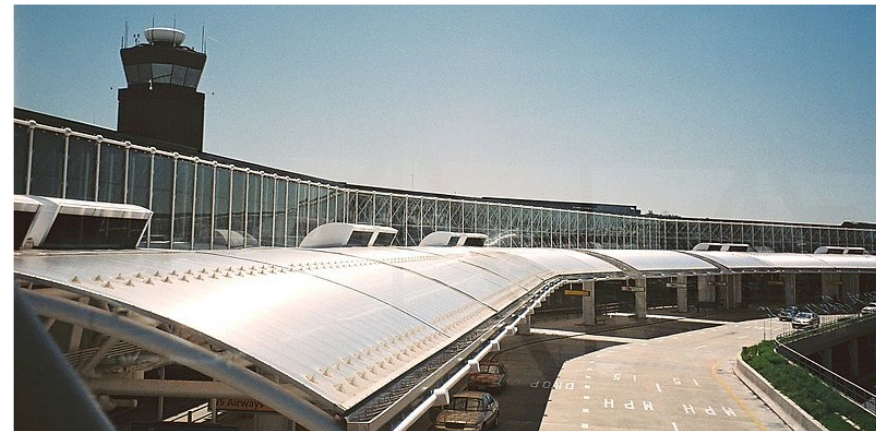
- Carried out in the National Capital Region by COG/TPB for 40 years
- The **Continuous Airport System Planning Program (CASP)** provides a regional process that supports planning, development and operation of airport and airport-serving transportation facilities in a systematic framework for the Washington region
- The TPB Aviation Technical Subcommittee develops, implements, and monitors CASP program activities and oversees integration of airport system planning with the regional transportation planning process. Members include:
 - Federal Aviation Administration (FAA)
 - Maryland Aviation Administration (MAA)
 - Virginia Department of Aviation (DOAV)
 - District of Columbia Office of Planning (DCOP)
 - District Department of Transportation (DDOT)
 - Metropolitan Washington Airports Authority (MWAA)
 - Staff from the Baltimore Metropolitan Council (BMC)

The Aviation Technical Subcommittee meets 6 times a year--on the 4th Thursday every other month



SURVEY OVERVIEW (1)

- The Washington-Baltimore Regional Air Passenger Survey is conducted every two years as an at-gate interview survey in the region's three commercial airports (BWI, DCA, IAD).
- The survey asks passengers about the purpose of their air travel, how they traveled to the airport, and other information to support the planning, development, and operation of airport facilities.



SURVEY OVERVIEW (2)

- The 2023 Washington-Baltimore Regional Air Passenger Survey was conducted last October at Dulles International Airport (IAD), Reagan National Airport (DCA), and Baltimore/Washington International Thurgood Marshall Airport (BWI), under the oversight of the TPB Aviation Technical Subcommittee.
- To test new survey methods, a pretest was conducted at IAD in April 2023.
- This presentation highlights general findings from the survey focusing on air passenger characteristics, ground access, and preferences and behavior.
- For all three airports, 486 flights were surveyed which yielded about 9,600 valid responses.



KEY FINDINGS ON PASSENGER CHARACTERISTICS

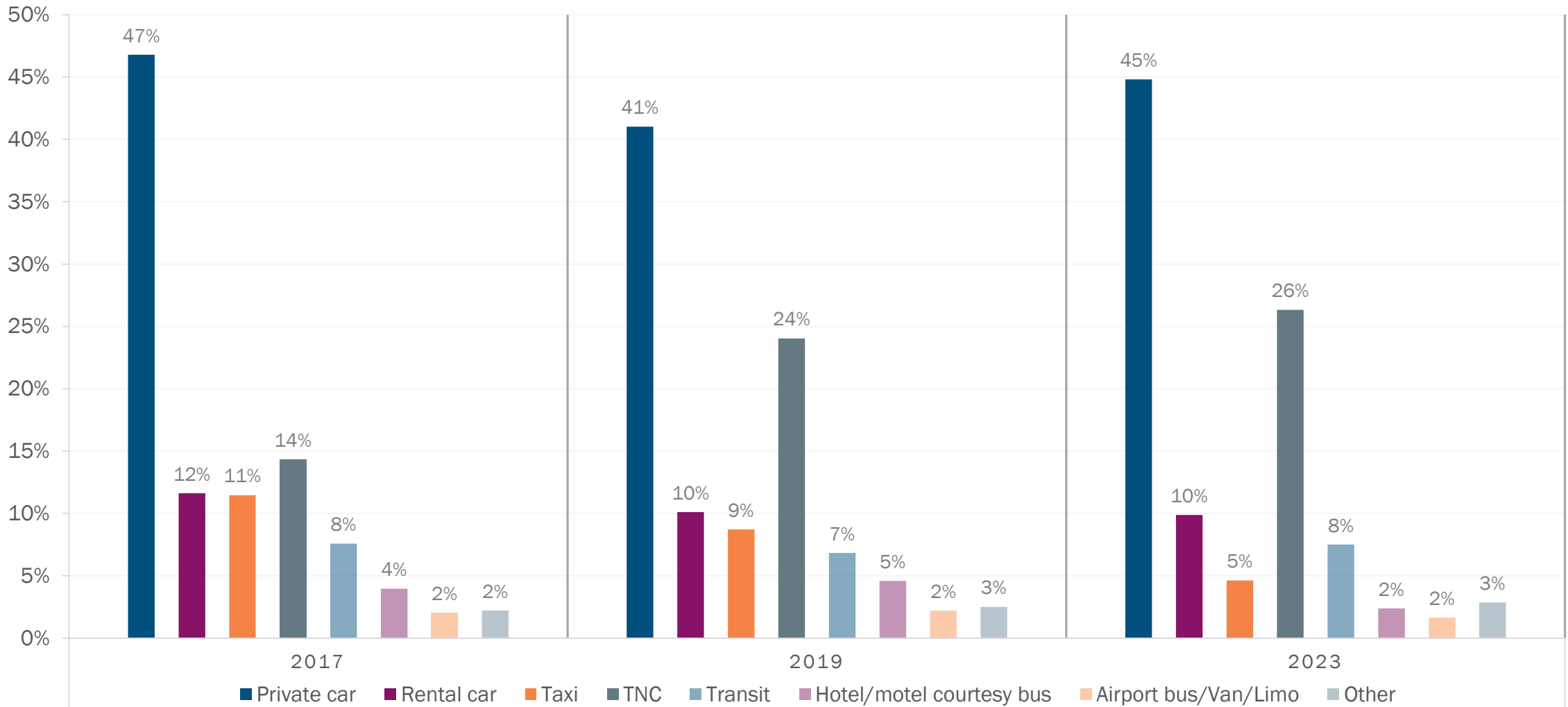
- Non-resident passengers continue to outnumber resident passengers, although the share of resident passengers has been gradually increasing across the region.
- The youngest and oldest age groups represent smaller proportions of passengers compared with other age ranges.

Business travel has declined while non-business (i.e., leisure/vacation and personal) travel has increased across the region and at all airports.

- More than one-third of passengers in the region earn over \$200,000 annually, suggesting that air travelers tend to be more affluent with nearly three-quarters having household incomes exceeding \$100,000.



PASSENGER MODE ACCESS - REGION



PASSENGER MODE ACCESS BY AIRPORT 2017-2023

Mode of Access	BWI			DCA			IAD			REGION		
	2017	2019	2023	2017	2019	2023	2017	2019	2023	2017	2019	2023
Private car	63%	57%	58%	29%	23%	30%	52%	45%	49%	47%	41%	45%
Rental Car	14%	13%	12%	9%	8%	9%	13%	10%	9%	12%	10%	10%
Taxi	4%	3%	2%	18%	12%	6%	11%	12%	6%	11%	9%	5%
TNC (Uber/Lyft)	8%	13%	17%	21%	36%	37%	13%	22%	24%	14%	24%	26%
Transit	4%	4%	4%	14%	13%	12%	3%	3%	5%	8%	7%	8%
Hotel/motel courtesy bus	3%	5%	2%	5%	5%	2%	4%	4%	3%	4%	5%	2%
Airport bus/Van/Limo	2%	2%	3%	2%	2%	0%	2%	2%	2%	2%	2%	2%
Other	2%	3%	3%	2%	2%	3%	2%	2%	2%	2%	3%	3%



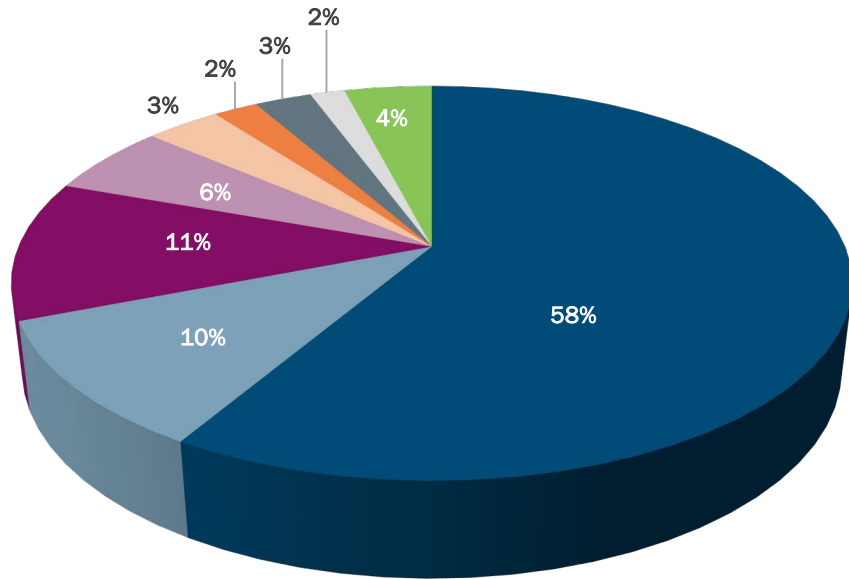
KEY FINDINGS ON GROUND ACCESS

- The primary origins for air passengers are private residences, followed by hotel/motels, together comprising over 90% of all trip origins.
- While private car remains the primary mode of access, the usage of transportation network companies (TNCs) such as Uber/Lyft has steadily risen across all airports, accounting for a quarter of all airport trips.
- Private cars are the preferred travel mode for residents, while TNCs are the top choice for non-residents.
- Private cars are the primary choice of travel mode for home locations, while TNCs dominate trips from non-home locations.
- For business trips, TNC usage increased while rental car and taxi trips declined; for non-business trips, TNC, transit, and rental car usage increased while private car and taxi trips decreased.
- Airport drop-offs decreased from three-quarters to about two-thirds of all airport trips.

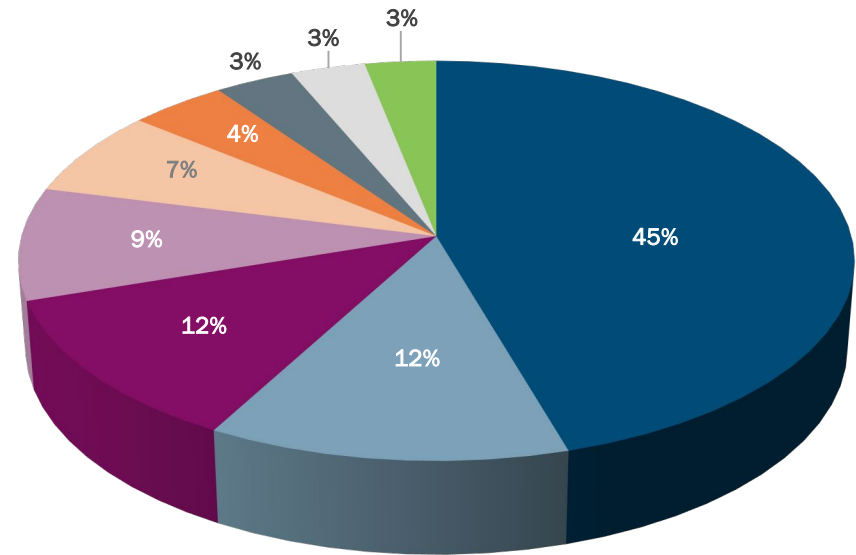


TOP REASON FOR CHOOSING THE AIRPORT

REGION - 2019



REGION - 2023



- Closest airport
- Only airport with direct/non-stop flight
- Better public ground transportation

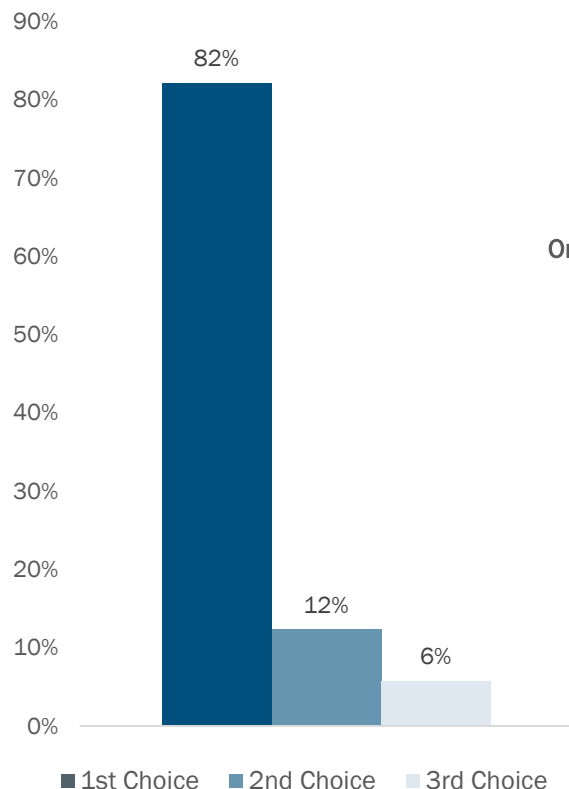
- More convenient flight times
- Only airport serving market
- Frequent flyer with specific airline

- Less expensive airfare
- Better access roads and Parking
- Other

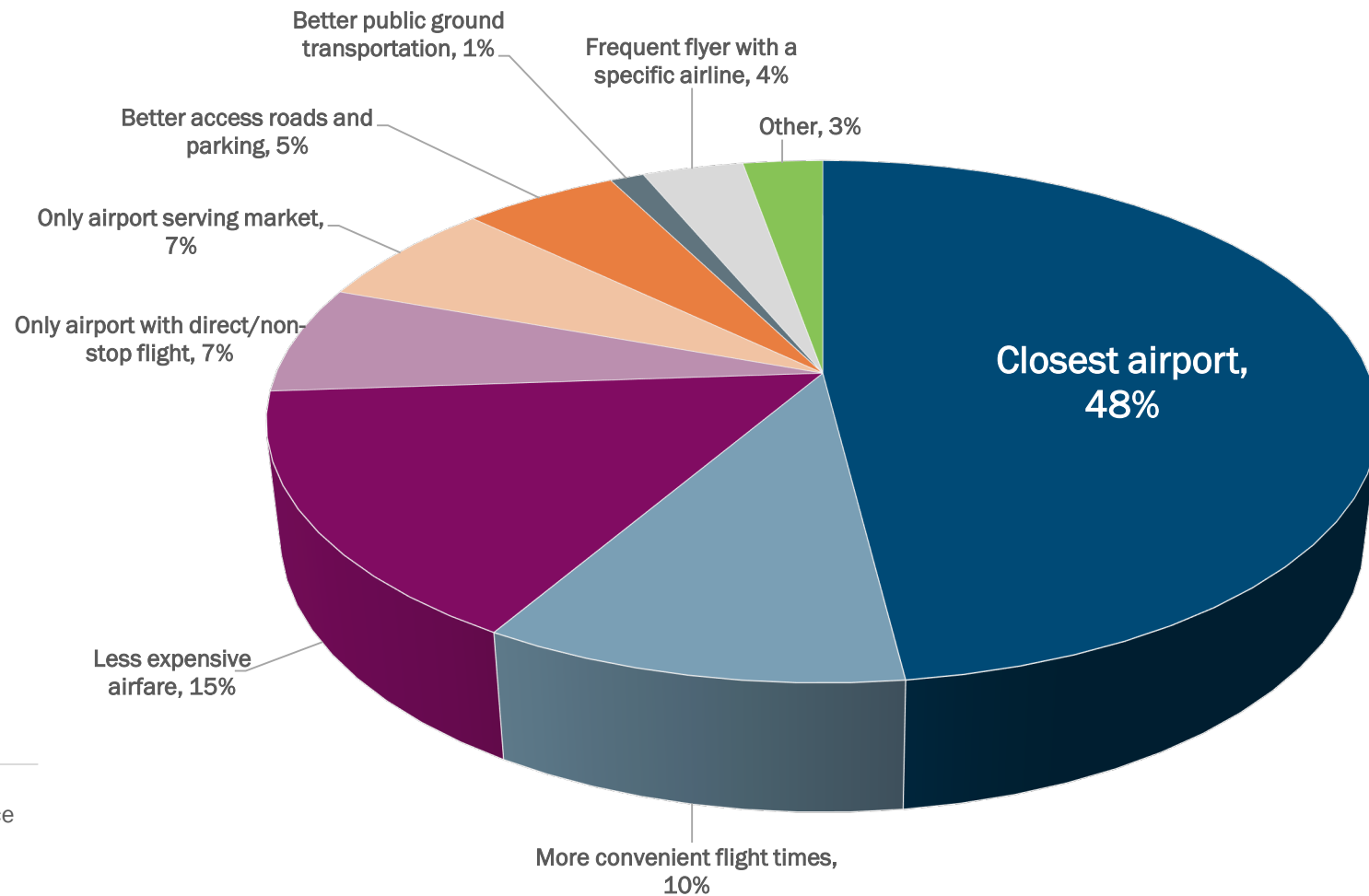


AIRPORT CHOICE FOR BWI PASSENGERS

AIRPORT CHOICE FOR BWI PASSENGERS - 2023

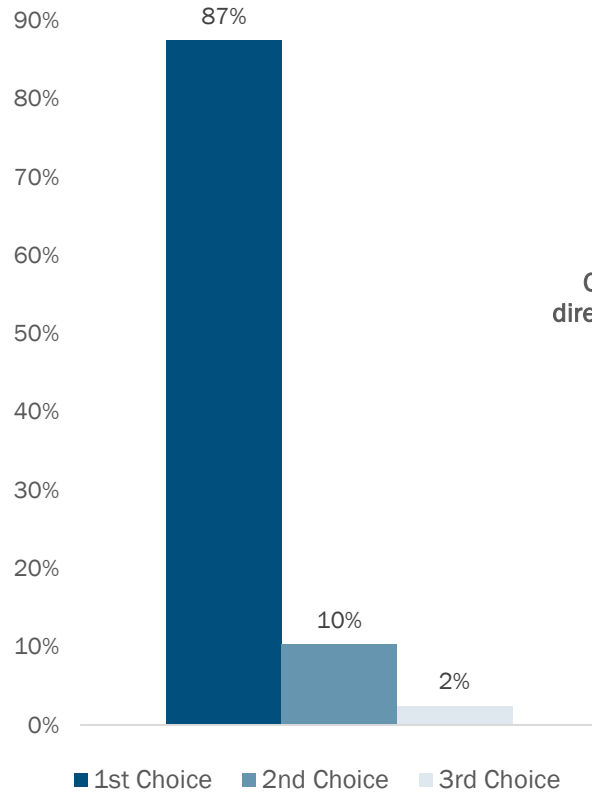


BWI – TOP REASON FOR CHOOSING THE AIRPORT - 2023

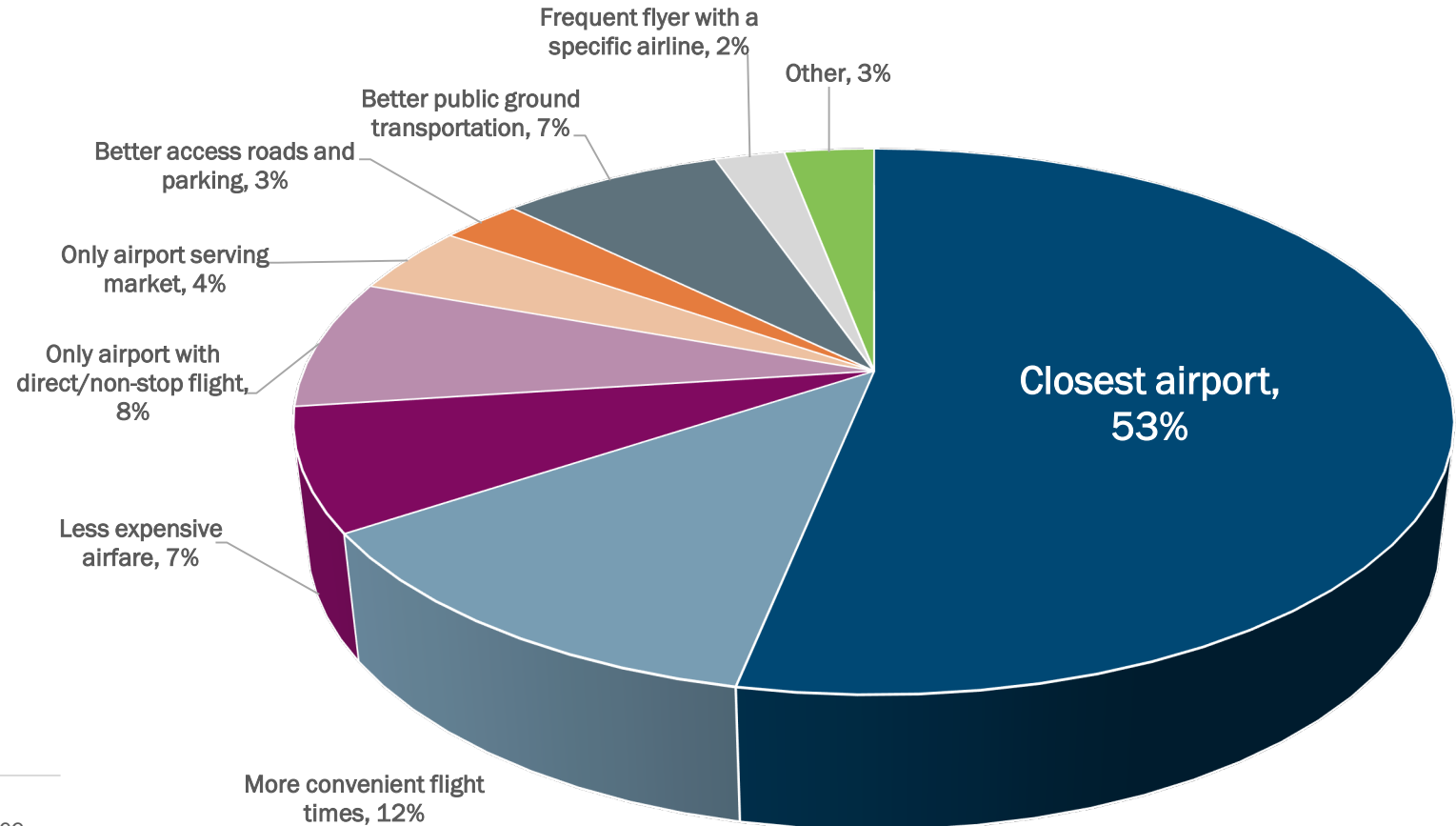


AIRPORT CHOICE FOR DCA PASSENGERS

AIRPORT CHOICE FOR DCA PASSENGERS - 2023

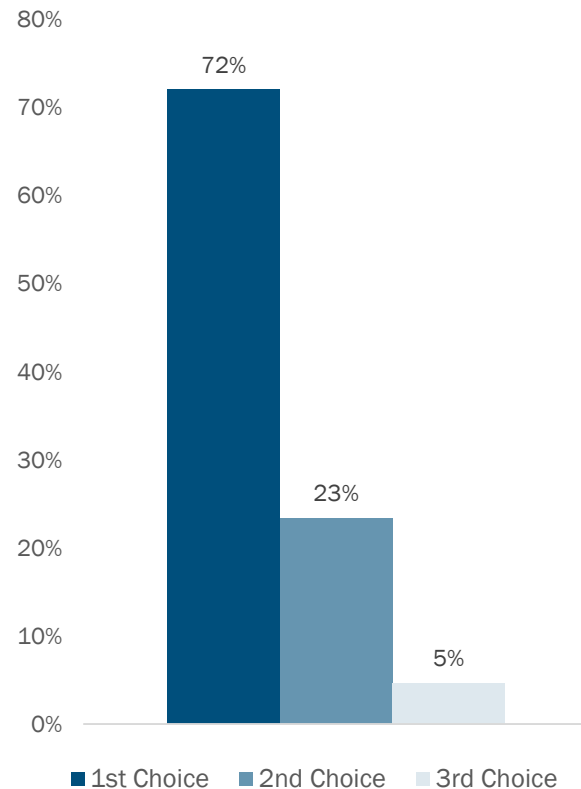


DCA – TOP REASON FOR CHOOSING THE AIRPORT - 2023

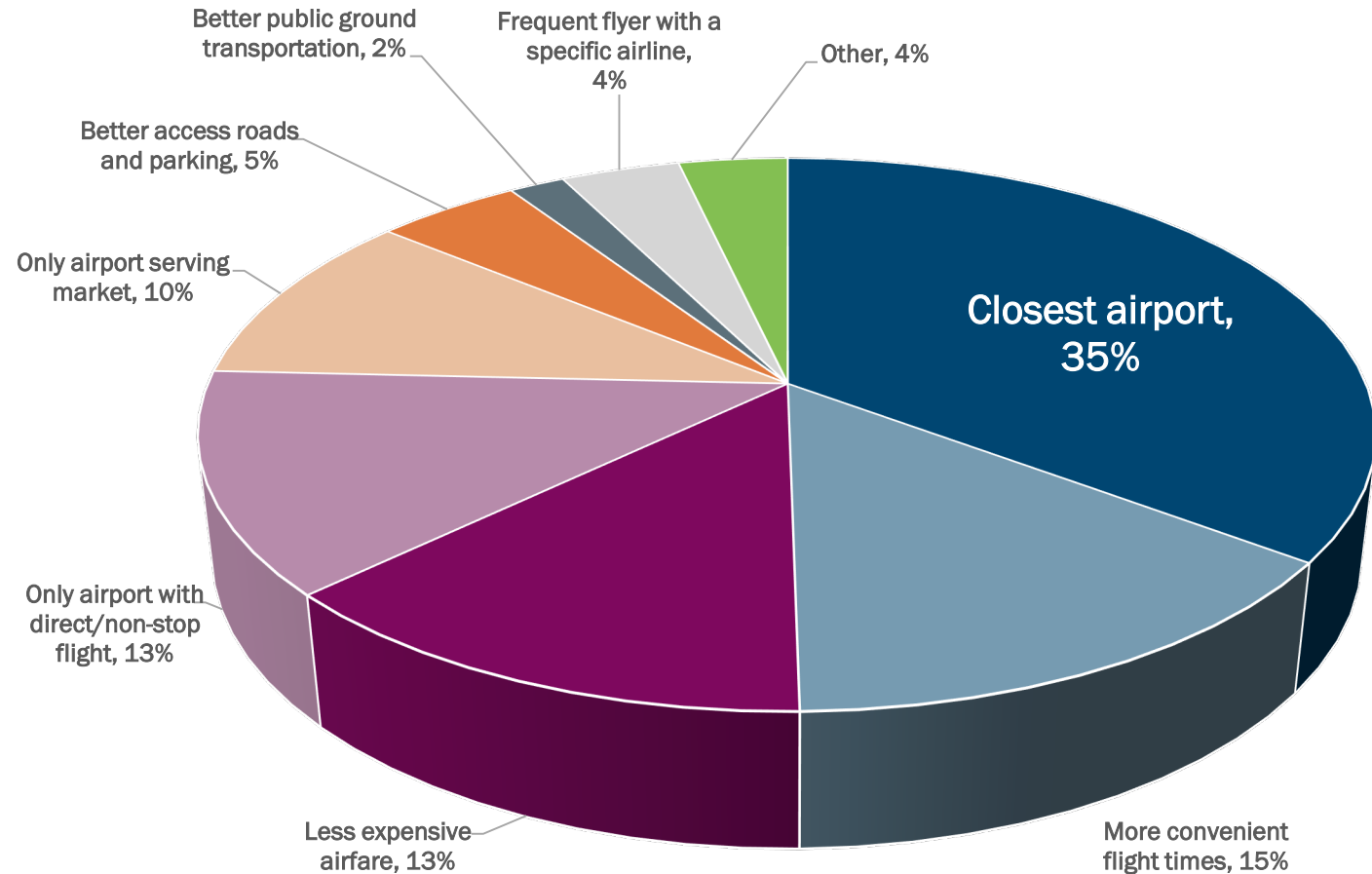


AIRPORT CHOICE FOR IAD PASSENGERS

AIRPORT CHOICE FOR IAD PASSENGERS - 2023



IAD – TOP REASON FOR CHOOSING THE AIRPORT - 2023



DIFFERENCES IN AIRPORT CHOICE BY AIRPORT

- Better public transportation access for selected more often by DCA passengers than other airports.
- A larger share of BWI passengers chose “less expensive flights” as the top reason for choosing their airport.
- IAD travelers were more likely to choose to fly out of IAD because it was the “only airport with direct flights” and “only airport serving the market”, reflecting the large number of international flights departing from Dulles.
- While all airports serve the region, each airport serves a specific market which is reflected in the survey data.



KEY TAKEAWAYS

- The largest share of air passengers chose their airport because it was the closest airport, especially for DCA passengers.
- Convenience was the top reason for choosing mode of access, followed by cost and reliability across the region.
- From pre- to post-pandemic, the share of passengers who typically traveled to the airport by private or rented car decreased slightly while the share of passengers who typically used taxi or ride-hail increased in the region.



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