

2009

**WASHINGTON-BALTIMORE
REGIONAL AIR PASSENGER SURVEY**

September 2010

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**NATIONAL CAPITAL REGION TRANSPORTATION PLANNING BOARD
METROPOLITAN WASHINGTON COUNCIL OF GOVERNMENTS
in cooperation with
METROPOLITAN WASHINGTON AIRPORTS AUTHORITY and
MARYLAND AVIATION ADMINISTRATION**

ABSTRACT

TITLE: 2009 Washington-Baltimore Regional Air Passenger Survey	DATE: September, 2010
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AGENCY: The Metropolitan Washington Council of Governments is the regional organization of the Washington area's major local governments and their governing officials. COG works toward solutions to such regional problems as growth, transportation, inadequate housing, air pollution, water supply, water quality, economic development and noise, and serves as the regional planning organization for Metropolitan Washington.	
REPORT ABSTRACT: This report presents the findings of a survey of approximately 21,000 air passengers at Ronald Reagan Washington National, Baltimore/Washington International Thurgood Marshall and Washington Dulles International Airports. Topics of analysis include airport use, airport preference, trip purpose, mode of access, and passenger characteristics.	
SUBJECT: 2009 Washington-Baltimore regional air passenger characteristics.	
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EXECUTIVE SUMMARY

In October, 2009 a regional air passenger survey was conducted at the three major commercial airports in the Washington-Baltimore Region: Ronald Reagan Washington National Airport (DCA), Washington Dulles International Airport (IAD) and Baltimore/Washington International Thurgood Marshall Airport (BWI). The survey was jointly funded by the Metropolitan Washington Airports Authority (MWAA) and the Maryland Aviation Administration (MAA) of the Maryland Department of Transportation (MDOT). Approximately 29,700 passengers out of a total of 59,300 enplaning passengers on 679 flights were interviewed as they waited to board their planes, an overall response rate of 50 percent. More than 20,900 survey questionnaires were completed. The survey questionnaires asked about the trip that was being made, the passenger's trip to the airport, the passenger's choice of airport, and the passenger's demographic characteristics. The 2009 regional air passenger survey was the ninth in a series of regional air passenger surveys conducted since 1981. Prior surveys were conducted in 1981/82, 1987, 1992, 1998, 2000, 2002, 2005 and 2007. Data from the air passenger surveys will provide the basis for analysis of major changes in airport use in the region and are an essential component of the air systems planning and master planning processes.

This report summarizes the findings regarding passenger trip characteristics, and compares the 2009 data to similar data collected in 2005 and 2007. Regional percentages shown in this document are subject to a sampling error of approximately plus or minus three percentage points at the 90 percent confidence level. Percentages at each of the individual airports are subject to a sampling error of twice that amount.

Some of the most important findings from the 2009 Washington-Baltimore Regional Air Passenger Survey, including changes in air passenger behavior and characteristics from 2005 to 2007, are summarized in the executive summary.

Airport Usage:

- Total annual air passenger enplanements at the region's three commercial airports declined by 4 percent between 2007 and 2009.
- Local originating passengers increased by 1 per cent at BWI Marshall, by 6 percent at Dulles and declined by 3 percent at Reagan National between 2007 and 2009.
- Connecting passengers decreased by 198,000 at Reagan National (-20%), and by 78,000 at BWI Marshall (-5%), and by 1.1 million (-19%) at Dulles when compared with 2007.
- The largest increase in the number of local originating air passengers between 2007 and 2009 was at Dulles, with 403,000 passengers.
- Local originating air passengers at BWI Marshall increased by 103,000 (+1%) between 2007 and 2009.
- Airport shares of locally originating air passenger trips in 2007 were:
 - 37% to BWI Marshall Airport (same as in 2007)
 - 34% to Reagan National Airport (down from 35% in 2007)
 - 29% to Dulles Airport (up from 27% in 2007)

Primary Reason for Selecting Airport Used:

- In 2009, closest airport and cost are the most important factors in selecting airport used:

Closest Airport:

- 72% of Reagan National Airport Users (up from 69% in 2007)
- 56% of BWI Marshall Airport Users (down from 58% in 2007)
- 53% of Dulles Airport Users (down from 54% in 2007)

Lowest Airfare:

- 27% of BWI Marshall Airport Users (up from 24% in 2007)
 - 16% of Dulles Airport Users (up from 14% in 2007)
 - 7% of Reagan National Airport Users (same as 2007)
-
- While the percentage of passengers citing closest airport as their most important reason declined at BWI Marshall and Dulles, when compared with 2007, an increase in citing less expensive airfare was observed at both these airports.
 - Overall, “quality of air service” factors are less important than accessibility conditions in terms of airport choice.

Airport Preference:

- Overall airport preferences expressed by all air passengers changed little between 2007 and 2009. National was preferred by 39% of the air passengers, BWI Marshall by 27% and Dulles by 17%. About 16% of the air passenger expressed no preference for a particular airport.
- In 2009, 41% of the area residents interviewed in the survey expressed a preference for National Airport, 31% preferred BWI Marshall and 22% preferred Dulles.

- In 2009, 38% of the non-residents reported that they preferred to use National Airport, 26% preferred BWI Marshall and 15% preferred Dulles.

Trip Purpose:

- In 2009, the percentage of locally originating air passengers reporting that they were traveling for non-business related reasons increased to 62% from 59% in 2007.
- While non-business trips such as vacation, and student or school related travel increased from 23% in 2007 to 24%, and from 4% to 5% in 2009 respectively, similarly personal or family affaires-related travel decreased from 30% to 29%.

Ground Trip Origin:

- Between 2007 and 2009 the percentage of air passengers beginning the air passenger trips from a private residence dropped from 57% to 56%.
- Air passenger leaving from a hotel or motel originations slightly dropped from 30% to 29% for the same time period.

Mode of Access:

- The most common mode of access to the airports in 2009 continued to be the automobile (private and rental), accounting for 62 percent of all local originations.
- Metrorail usage by passengers traveling to National Airport continues to be among the highest proportions of any airport in the Nation, at 16 percent. However, access by private car remained the same at 32 percent.

Air Traveler Characteristics:

- In 2009 residents accounted for 39% of the total departing air passengers, and non-residents with 61%.
- In 2009, the percentage of local originating passengers under the age of 25 increased from 9% in 2007 to 11% in 2009, while the percentage of passengers age 35 and older show a slight decrease of 1 per cent between 2007 and 2009.
- Air travelers in the Washington-Baltimore region continue to be affluent. In 2009, 30% of the region's passengers had household incomes less than \$80,000. At all three airports more than 70% of air passengers both residents and non-residents had incomes of \$80,000 or more.
- Comparison of residents and non-residents that are departing passengers show that just over half of area residents have annual household income of over \$120,000.
- More than a quarter of air passengers departing from the three major airports used the E-ticket kiosks for boarding pass and bag checking services at the airports, while 15 percent used airline ticket agents and six percent used curbside airline facilities. However, almost 30 percent of departing passengers made multiple stops at various facilities for both boarding pass and/or bag checking.

This survey was a joint venture, conducted by the National Capital Region Transportation Planning Board (TPB), the Maryland Aviation Administration and the Metropolitan Washington Airports Authority, in cooperation with the airlines serving the region. The project was guided by the Aviation Technical Subcommittee of the TPB Technical Committee, composed of a broad range of Federal, State, Local, and private aviation interests.

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I. INTRODUCTION

This report summarizes the findings from the 2009 Washington-Baltimore Regional Air Passenger Survey conducted concurrently at Baltimore/Washington International Thurgood Marshall Airport (BWI Marshall), Washington Dulles International Airport (IAD) and Ronald Reagan Washington National Airport (DCA). The Metropolitan Washington Council of Governments (MWCOG) conducted this survey as part of its Continuous Airport System Planning (CASP) program. One of the goals of this program is to continue the rational development of aviation facilities and services at the three major commercial airports serving the Washington-Baltimore region. Figure 1 represents the jurisdictions that combine to make up this region, and locates the three airports.

The 2009 regional air passenger survey was the ninth in a series of regional air passenger surveys conducted since 1981. Prior surveys were conducted in 1981/82, 1987, 1992, 1998, 2000, 2002, 2005 and 2007. Data from the air passenger surveys will provide the basis for analysis of major changes in airport use for the region. Hundreds of millions of dollars have been invested in facility improvements at the region's three major commercial airports in the past several years and more improvements are planned for the future. The data produced by these air passenger surveys will be invaluable in further planning for these improvements. Several other areas in which the survey data will be particularly useful are as follows:

- Market analyses, passenger trip mode and purpose, geographic information, preferred airport, and socioeconomic data on passengers for use in developing airport, airline and support services;

- Planning for airport access roadways and services, including development of transportation model improvements such as enhanced mode split models and estimates of airport traffic volumes;

- Planning terminals and groundside facilities, including parking, curbside, baggage, and passenger boarding gate areas;
- Time series trend analyses of changes in air traveler characteristics and airport use; and,
- Air passenger demand and allocation forecasting for future updates of the Washington-Baltimore Regional Airport System Plan.

The 2009 air passenger survey was conducted during two weeks in the fall of 2009: the week of October 11th through October 24th and the week of October 25th through November 7th. A small number of flights that were either missed or required resurveying were surveyed during the week of October 25th to November 7th. Approximately 29,700 passengers out of a total of 61,400 enplaning passengers on 679 (617 domestic and 62 International) flights were interviewed as they waited to board their planes, an overall response rate of 48 percent. Nearly, 21,000 completed survey questionnaires representing the responses of these 29,700 passengers were collected, processed and tabulated.

Table 1
2009 Washington-Baltimore Regional Air Passenger Survey
Data Collection Summary

Airport	No. of Flights Surveyed	No. Survey Completed (With Pass. Factor)	Rev. Pass Count	Response Rate		Actual No. of Completed Surveys
				(With Pass. Factor)	(Without Pass. Factor)	
BWI	227	12,767	22,933	56%	37%	8,570
DCA	208	7,937	15,251	52%	37%	5,664
IAD	244	9,007	21,137	43%	31%	6,489
Total	679	29,711	59,321	50%	35%	20,723
Mailback						234
Grand Total						20,957

The 2009 Washington-Baltimore Regional Air Passenger Survey sample included flights from 33 airlines, of which 15 were international and 18 were domestic carriers. The

sample flights selected were grouped into seven regional destination clusters containing a total of 116 destinations, 30 international and 86 domestic (see Table 2). Table 3 shows the distribution of selected sample flights by departure time period at each airport.

Table 2
2009 Washington-Baltimore Regional Air Passenger Survey
No. of Survey Flights by Airport and Destination Region

Region	BWI	DCA	IAD	Total
Great Lakes	20	20	20	60
Mid-Atlantic	30	22	42	94
New England	30	26	20	76
New York	20	26	20	66
South East	64	62	44	170
West	51	46	54	151
International	12	6	44	62
Total	227	208	244	679

Table 3
2009 Washington-Baltimore Regional Air Passenger Survey
No. of Survey Flights by Airport and Flight Hours

Survey Hours	BWI	DCA	IAD	Total
5:00 - 10:00 AM (AM Peak)	61	67	57	185
10:00 AM - 2:00 PM (Mid-Day)	53	46	53	152
2:00 PM - 6:30 PM (PM Peak)	69	57	78	204
6:30 PM - 12:00 AM (Night)	44	38	56	138
Total	227	208	244	679

Figure 1
Washington / Baltimore Air System Planning Region



The same format and survey techniques used in the previous surveys were used to ensure data consistency and increase the usefulness of data collected from previous surveys.

The survey instrument contained questions regarding the passengers' trip (i.e. destination, trip purpose), the trip to the airport (i.e. origination, mode of access), about the passengers' choice of airport (i.e. airport preference, airport usage), and several demographic questions regarding the passenger (i.e. household size, age, income). The information gathered will be useful in airport system planning, as well as in the airport master planning process. The 2009 survey questionnaire is included as Appendix B of this report.

This survey was a joint venture conducted by the National Capital Region Transportation Planning Board (TPB), the Maryland Aviation Administration and the Metropolitan Washington Airports Authority, in cooperation with the airlines serving the region. The project was guided by the TPB Technical Committee's Aviation Technical Subcommittee which is composed of a broad range of federal, state, local, and private aviation interests.

II. FINDINGS

This chapter summarizes the major results of the 2009 Washington-Baltimore Regional Air Passenger Survey. Survey results are summarized by airport as well as for the Washington-Baltimore air systems planning region as a whole. The various travel modes used to access each airport, trip purpose, number of trips at each airport, preferred airport, trip origin, place of origin, age of air travelers and income of air travelers are addressed. These discussions generally reflect trips where passengers arrived at the airport by ground transportation. Passengers who connected with flights are included only in discussions of “total enplanements” in the “Airport Use” section of this report.

Although the data for the 2009 survey was primarily collected over a two week period in October, the survey results have been “annualized” to observed annual passengers for the 12-month period from January to December 2009. Regional percentages shown in the data tables are subject to a sampling error of approximately plus or minus three percentage points at the 90 percent confidence level. Percentages at individual airports are subject to a sampling error of twice that amount. Where applicable, the 2009 survey results are compared with results from the 2005 and the 2007 surveys.

Airport Use

Commercial aviation activity in the region rebounded significantly between 2002 and 2005. Total annual air passenger enplanements at the region’s three commercial airports increased by 25 percent between 2002 and 2005, and by 5 percent between 2005 and 2007. However, annual enplanements at the three commercial airports declined by 4 percent between 2005 and 2007. As shown in Table 4, observed annual enplanements in 2009 (30.9 million) are now 1.1 million less than in 2007 (32 million).

Table 4 shows that the decline in total enplanements between 2007 and 2009 was due to a 17 percent decline or 1.4 million in the number connecting passengers (from 8.4 to 7

million). In fact the number of local originating passengers increased by 1 per cent (from 23.6 million to 23.8 million).

The greatest percentage decrease in connecting passengers between 2007 and 2009 was seen at DCA, - 198,000, a decline of 20 percent. Connecting passengers dropped by 1.1 million at Dulles (19% decline), and by 78,000 at BWI Marshall (5% decrease). Connecting passengers at IAD accounted for 80 percent of the total decrease in connecting passengers coming through the region, which could be attributed to the decline in international flight originations destined to other local destinations.

The largest increase in the number of local originating air passengers between 2007 and 2009 was observed at Dulles, by 403,000 passengers, an increase of 6 percent. Local originating air passengers at BWI Marshall increased by 103,000 (1% increase) between 2007 and 2009. However, at Reagan National, local originating passengers declined by 296,000 between 2007 and 2009. Overall local originating air passengers increased regionally slightly by 216,000 between 2007 and 2009, or a 1 percent increase.

Figure 2 illustrates the airport share of total enplaning passengers, connecting passengers, and originating passengers from the surveys conducted in the three most recent survey years. In 2009, the greatest share of the region's total enplaning passengers departed from Dulles airport, which accounted for 37 percent (down from 38 percent in 2007), while 34 percent (up from 33 percent in 2007) departed from BWI Marshall and 29 percent (same as in 2007) departed from National. Dulles had the greatest share of the region's connecting passengers (66 percent) and BWI Marshall has the greatest share of the region's local originating passengers.

Table 4
Washington-Baltimore Regional Airports
Annual Air Passengers Trip Originations
(Thousands of Originations)

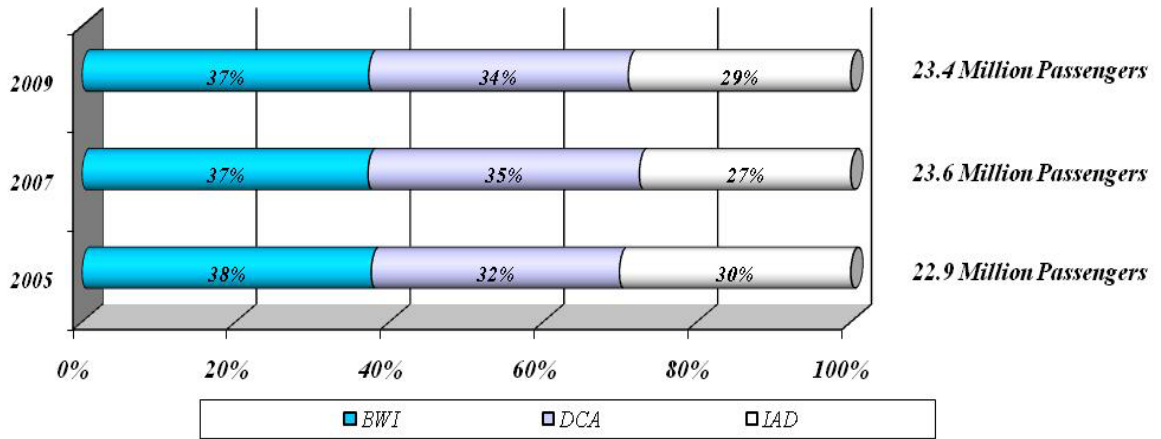
Enplanement Type		BWI Marshall			Dulles			Reagan National			Region		
		2005	2007	2009	2005	2007	2009	2005	2007	2009	2005	2007	2009
Local originations	<i>Number</i>	8,605	8,795	8,898	6,876	6,495	6,898	7,378	8,341	8,051	22,859	23,631	23,847
(came by ground transportation)	<i>Percent</i>	87%	84%	85%	55%	53%	60%	90%	89%	91%	75%	74%	77%
Connected from another flight	<i>Number</i>	1,311	1,657	1,579	5,533	5,768	4,644	812	995	797	7,656	8,420	7,020
	<i>Percent</i>	13%	16%	15%	45%	47%	40%	10%	11%	9%	25%	26%	23%
Total Enplanement	<i>Number</i>	9,916	10,452	10,477	12,409	12,263	11,542	8,190	9,336	8,848	30,515	32,051	30,867
Percent of Region		32%	33%	34%	41%	38%	37%	27%	29%	29%	100%	100%	100%

Notes:

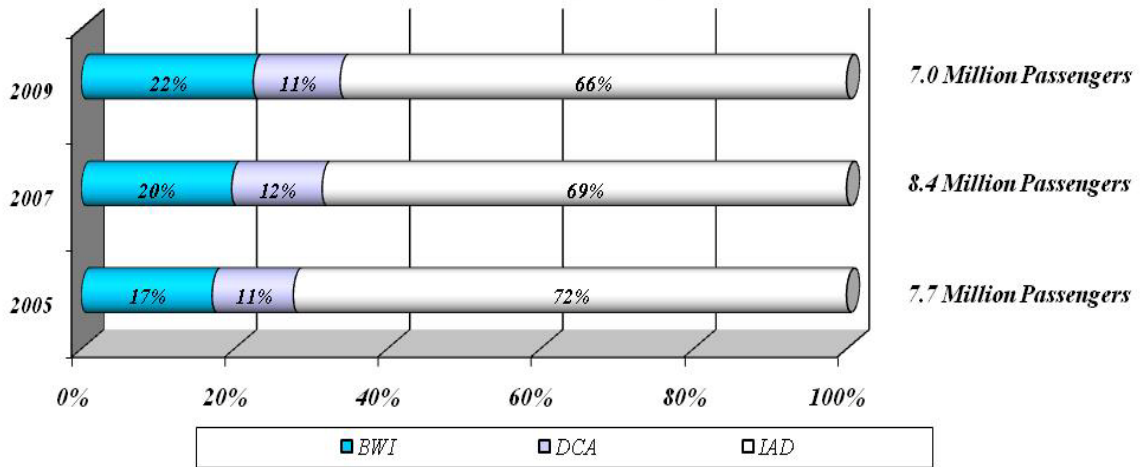
* Totals may not add due to rounding

* "Total Enplanements" includes passengers on domestic scheduled, commuter and international flights

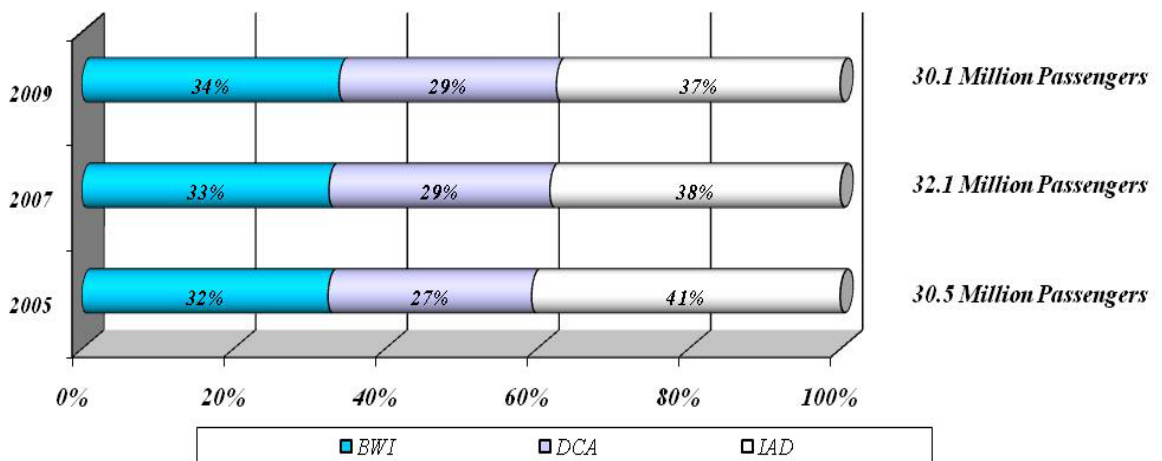
**Figure 2 - Annual Airport Share of Passengers
Originating Passengers**



Connecting Passengers



Total Passengers



Airport Preference

Survey respondents were asked to rank the three most important reasons for choosing the airport from which they were flying out of a list of nine possible reasons. Table 5 summarizes the most important reasons cited by air passengers for choosing the airport they used. The possible reasons have been categorized as either accessibility conditions (closest airport, better public transportation, better road access and parking facilities) or quality of air service reasons (convenient flight times, nonstop or direct flights, less expensive airfares, frequent flier restrictions).

The percentage of locally originating passengers citing accessibility conditions as the most important reason for choosing the airport they used overall remained unchanged when compared with 2007 at 66 percent. While the percentage of passengers citing this reason remained virtually unchanged at Dulles, and increased slightly at Reagan National, between 2007 and 2009, from 76 percent to 79 percent. However, for 2009, at BWI Marshall, the share of passengers citing accessibility conditions as a primary reason for choosing the airport dropped by 2 percent when compared with 2007. Similarly, the percentage of locally originating passengers at BWI Marshall citing more convenient flight times, direct non-stop flights to their destination, remained unchanged while less expensive air fare as the most important reason for their airport increased slightly when compared with 2007.

This finding from the 2009 air passenger survey suggests that convenience of flight times, availability of direct non-stop flights to destinations, and less expensive air fare, may have caused the increase in “quality of air service” factors in air passenger reasons for choosing BWI Marshall. At Dulles, the decline in accessibility reasons could be attributed to an increase in passengers citing more convenient flight times and direct non-stop flights to their destinations as a primary reason for choosing the airport. The decline of passengers citing less expensive air fare dropped dramatically at Dulles between 2005 and 2007, however there was a slight increase in 2009 to 16 percent.

Quality of air service, as an important reason for selecting the airport used increased slightly from 31 percent in 2007 to 33 percent in 2009. Of the quality of air service characteristics, the percentage of passengers citing lower air fares as the primary reason for choosing an airport increased slightly from 15 percent in 2007 to 17 percent in 2009, reversing trend observed between 2005 and 2007. The percentage of passengers citing more convenient flight times as the most important reason remained the same at 7 percent.

Passengers were also asked which airport they would have preferred to use for their trip because using some travel restrictions and service availability sometimes present passengers from using their preferred airport. Table 6 shows the percentages for preferred airport, by airport, for locally originating passengers for each of the survey years.

For the region, in 2009, 38 percent (up from 37 percent in 2007), of locally originating passengers preferred to use Reagan National, 19 percent (up from 18 percent in 2007) preferred to fly out of Dulles, while 27 percent (down from 29 percent in 2007) preferred to travel from BWI Marshall. Sixteen percent of the passengers expressed no particular preference for one of the region's three commercial airports, up from 15 percent in 2007.

Between 2007 and 2009, there was a slight change in the number of passengers flying out of their preferred airport. In 2009, 64 percent of the local originating air passengers reported that they flew out of their preferred airport. Figure 3 illustrates these percentages for the three most recent survey years.

Table 5
Washington-Baltimore Regional Airports
Most Important Reason for Choosing Airport Used

Primary reason for choosing airport used	BWI Marshall			Dulles			Reagan National			REGION		
	2005	2007	2009	2005	2007	2009	2005	2007	2009	2005	2007	2009
<i>Accessibility</i>												
Closest airport	63%	58%	56%	51%	54%	53%	71%	69%	72%	62%	61%	61%
Better public ground transportation	0%	0%	1%	2%	0%	1%	5%	6%	6%	3%	2%	3%
Better access roads and parking	3%	4%	3%	5%	3%	3%	3%	1%	1%	3%	3%	2%
SUBTOTAL --Accessibility	66%	62%	60%	58%	57%	57%	79%	76%	79%	68%	66%	66%
<i>Quality of Air Service</i>												
More convenient flight times	4%	5%	5%	7%	9%	8%	6%	8%	8%	5%	7%	7%
Only airport with direct/non-stop flight	2%	4%	4%	7%	11%	11%	3%	3%	2%	4%	5%	5%
Less expensive airfare	22%	24%	27%	22%	14%	16%	8%	7%	7%	17%	15%	17%
Frequent flyer with specific airline	2%	2%	1%	3%	4%	4%	2%	2%	2%	2%	2%	2%
Only airport serving market	2%	2%	1%	3%	3%	3%	1%	1%	1%	2%	2%	2%
SUBTOTAL --												
Quality of Air Service	32%	37%	39%	42%	41%	42%	20%	21%	20%	30%	31%	33%
OTHER	2%	2%	1%	2%	2%	2%	2%	2%	1%	2%	2%	1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Notes:

* Totals may not add due to rounding

* "Total Enplanements" include passengers on scheduled domestic, commuter and international flights

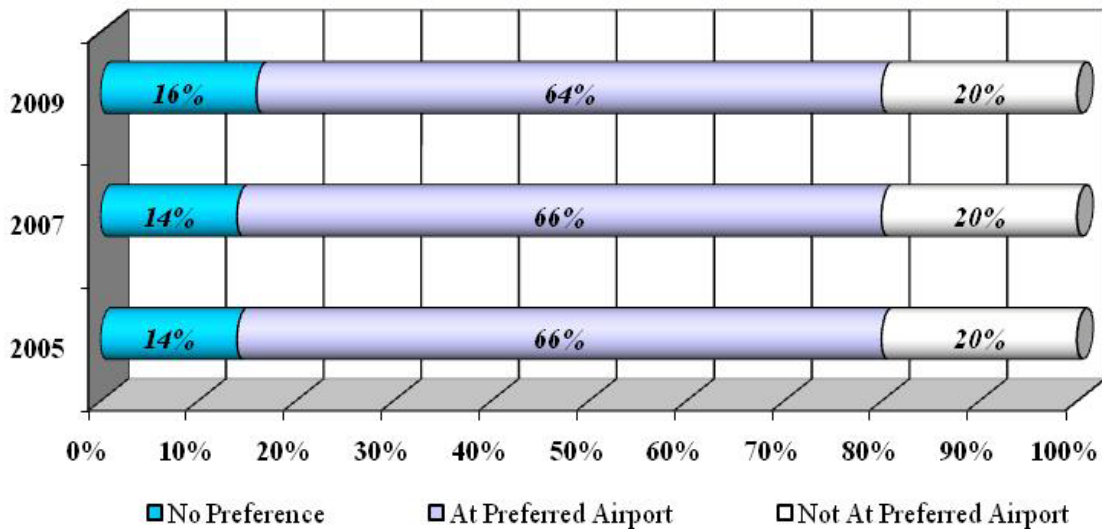
Table 6
Washington-Baltimore Regional Airports
Annual Originating Air Passengers Preferred Airport
(Thousands of Originations)

Preferred Airport		BWI Marshall			Dulles			Reagan National		
		2005	2007	2009	2005	2007	2009	2005	2007	2009
BWI MARSHALL	<i>Number</i>	5,880	5,881	5,522	437	429	455	290	281	276
	<i>Percent</i>	70%	70%	65%	7%	7%	7%	4%	3%	4%
DULLES	<i>Number</i>	479	411	530	3,356	3,286	3,303	579	427	504
	<i>Percent</i>	6%	5%	6%	52%	54%	50%	8%	5%	7%
REAGAN NATIONAL	<i>Number</i>	950	959	1,180	1,593	1,454	1,549	5,261	6,074	5,946
	<i>Percent</i>	11%	11%	14%	25%	24%	24%	74%	75%	77%
No Preference	<i>Number</i>	1,079	1,171	1,297	1,054	953	1,248	974	1,299	1,023
	<i>Percent</i>	13%	14%	15%	16%	16%	19%	14%	16%	13%
TOTAL	<i>Number</i>	8,388	8,422	8,529	6,440	6,122	6,555	7,104	8,081	7,749
	<i>Percent</i>	100%	100%	100%	100%	100%	100%	100%	100%	100%
Non-Respondents		217	367	365	436	374	338	274	262	300
Total Originations		8,605	8,789	8,894	6,876	6,496	6,893	7,378	8,343	8,049

Notes:

* Totals may not add due to rounding

Figure 3
Satisfaction with Airport Used
(originating Passengers Only)



The difference in airport preference between residents and non-residents is summarized in Table 7. In 2009, local originating passengers who were visiting the region (non-residents) accounted for 61 percent of local originating passengers. Of these visitors, 38 percent listed Reagan National as their preferred airport compared with 41 percent of resident air passengers who preferred National. Preference rates for non-residents were 26 and 15 percent for BWI Marshall and Dulles, respectively, compared to 31 percent and 22 percent for residents. Non-residents continued to be least likely to express a preference for a particular airport, (22 percent), compared to residents (7 percent).

Table 7
Washington-Baltimore Regional Airports
Annual Originating Air Passengers Preferred Airport by Resident Status
(Thousand of Originations)

Preferred Airport		Non-Residents			Residents			TOTAL		
		2005	2007	2009	2005	2007	2009	2005	2007	2009
BWI Marshall	<i>Number</i>	2,656	2,959	3,138	3,307	2,940	2,415	5,963	5,899	5,553
	<i>Percent</i>	27%	26%	26%	36%	34%	31%	31%	29%	27%
Dulles	<i>Number</i>	1,508	1,512	1,789	2,348	1,917	1,716	3,856	3,429	3,505
	<i>Percent</i>	15%	13%	15%	25%	22%	22%	20%	17%	17%
Reagan National	<i>Number</i>	3,905	4,393	4,634	3,270	3,201	3,227	7,175	7,594	7,861
	<i>Percent</i>	40%	39%	38%	35%	37%	41%	38%	38%	39%
No Preference	<i>Number</i>	1,689	2,464	2,722	389	613	559	2,078	3,077	3,281
	<i>Percent</i>	17%	22%	22%	4%	7%	7%	11%	15%	16%
TOTAL	<i>Number</i>	9,758	11,328	12,283	9,314	8,671	7,917	19,072	19,999	20,200
	<i>Percent</i>	100%	100%	100%	100%	100%	100%	100%	100%	100%

Notes:

* Totals do not include non-respondents and resident unknown

Trip Purpose

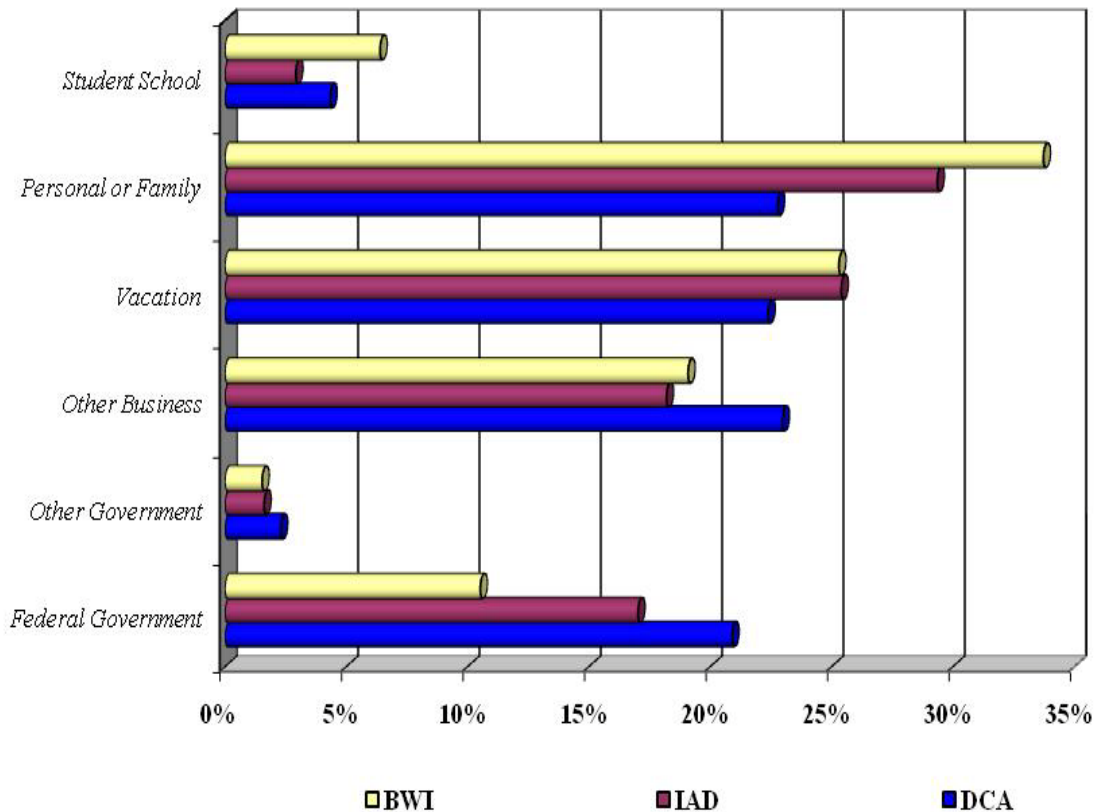
In 2009, the percentage of locally originating air passengers reporting that they were traveling for non-business related reasons increased compared to 2007. In past surveys, business-related travel accounted for a little than half of all reported travel. As shown in Table 8, this percentage dropped to 38 percent. In 2007 non-business, vacation travel dropped from 26 percent in 2005 to 23 percent in 2007 and student/school-related travel dropped from 7 percent to 4 percent. However, in 2009 an increase in vacation and student or school related trips was observed to 24 percent and 5 percent respectively. Similarly, a slight decline in personal or family related reasons dropped from 30 percent in 2007 to 29 percent in 2009.

The increase in non-business related trips between earlier surveys and 2005 was possibly due to reasons such as transitory temporal or seasonal factors. Past air passenger surveys have been typically conducted in the fall (mid-October/ early-November), but the 2005 survey was conducted in the early spring (March 6th to March 19th). Though the 2005 survey was specifically scheduled to avoid the “Cherry Blossom Festival,” the Easter

holiday/recess, and public school spring-break holidays, this early March time period did coincide with some college semester spring breaks. Nonetheless, even in the last several fall air passenger surveys, a slow shift from business-related to non-business related air travel had been observed. The 2009 survey results show a similar pattern as results from earlier fall surveys.

Figure 4 depicts the breakdown of air travel by trip purpose at each of the three airports in 2007. This figure shows that National generally has the greatest percentage of business-related air travel, Dulles has the greatest percentage of vacation-related travel and BWI has the greatest percentage of personal or family-related travel.

*Figure 4
Annual Originating Air Passengers Trip Purpose*



2009 Washington-Baltimore Regional Air Passenger Survey

Table 8
Washington-Baltimore Regional Airports
Annual Originating Air Passengers Trip Purpose
(Thousands of Passengers)

Trip Purpose		BWI Marshall			Dulles			Reagan National			REGION		
		2005	2007	2009	2005	2007	2009	2005	2007	2009	2005	2007	2009
<i>Business Related</i>													
Business related to federal government (including military)	<i>Number</i>	1,007	902	933	978	991	1,158	1,893	1,840	1,672	3,878	3,733	3,763
	<i>Percent</i>	12%	10%	11%	14%	15%	17%	26%	22%	21%	17%	16%	16%
Other government-related business	<i>Number</i>	150	151	136	152	102	110	350	222	184	652	475	430
	<i>Percent</i>	2%	2%	2%	2%	2%	2%	5%	3%	2%	3%	2%	2%
Other Business	<i>Number</i>	2,073	1,889	1,692	1,350	1,391	1,238	1,700	2,164	1,838	5,123	5,444	4,768
	<i>Percent</i>	24%	22%	19%	20%	22%	18%	23%	26%	23%	23%	23%	20%
SUBTOTAL -- Business	<i>Number</i>	3,230	2,942	2,761	2,480	2,484	2,506	3,943	4,226	3,694	9,653	9,652	8,961
	<i>Percent</i>	38%	34%	31%	36%	39%	37%	54%	51%	46%	42%	41%	38%
<i>Non-Business Related</i>													
Vacation	<i>Number</i>	2,328	2,044	2,243	2,189	1,870	1,728	1,482	1,449	1,791	5,999	5,363	5,762
	<i>Percent</i>	27%	23%	25%	32%	29%	25%	20%	17%	22%	26%	23%	24%
Personal or family affairs	<i>Number</i>	2,165	3,234	2,990	1,580	1,680	1,997	1,359	2,016	1,822	5,104	6,930	6,809
	<i>Percent</i>	25%	37%	34%	23%	26%	29%	19%	24%	23%	22%	30%	29%
Student or school related	<i>Number</i>	646	362	567	524	194	199	438	374	347	1,608	930	1,113
	<i>Percent</i>	8%	4%	6%	8%	3%	3%	6%	5%	4%	7%	4%	5%
Other	<i>Number</i>	174	154	304	82	172	373	99	232	346	355	558	1,023
	<i>Percent</i>	2%	2%	3%	1%	3%	5%	1%	3%	4%	2%	2%	4%
SUBTOTAL -- Non-Business	<i>Number</i>	5,313	5,794	6,104	4,375	3,916	4,297	3,378	4,071	4,306	13,066	13,781	14,707
	<i>Percent</i>	62%	66%	69%	64%	61%	63%	46%	49%	54%	58%	59%	62%
TOTAL	<i>Number</i>	8,543	8,736	8,865	6,855	6,400	6,803	7,321	8,297	8,000	22,719	23,433	23,668
	<i>Percent</i>	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Non-Respondents		62	60	29	21	95	90	57	45	50	140	200	169
Total Originations		8,605	8,796	8,894	6,876	6,495	6,893	7,378	8,342	8,050	22,859	23,633	23,837

Notes:

* Totals may not add due to rounding

Trip Origin Activities

Table 9 summarizes the ground trip origin responses for the last three survey years. In all three surveys, most local passengers left for the airport from a private residence. Between 2007 and 2009, the percentage of air passengers beginning their trip from a private residence decreased from 57 percent to 56 percent. Those leaving from a hotel or motel show a slight decrease from 30 percent in 2007 to 29 percent in 2009. National Airport continued to have the greatest percentage of passengers originating from a hotel or motel at 38 percent. For the region, there was no change in the percentage of passengers who reported beginning their trip to the airport from either their regular place of employment, or in those passengers beginning their trip from another place of business.

Mode of Access

Table 10 provides a summary of mode of access to each airport and for the region. Regionally, as in previous surveys, the most common mode of access to the airports in 2007 was the automobile (both private autos and rental cars), accounting for 62 percent of all local originations. Taxicabs were used by 17 percent of the passengers, and public transportation (including Metrorail, BWI Marshall rail and airport buses/van and limousines) carried 15 percent. Courtesy buses provided by hotels and motels accounted for only 4 percent of all local originations in 2009, a slight decrease when compared with 2007.

Metrorail usage by passengers traveling to National Airport continues to be among the highest proportions of any airport in the nation, at 16 percent. However, access by private car to Reagan National remained unchanged at 32 percent. The percentage of air passengers arriving by rental car at Reagan National decreased slightly to 8 percent in 2009, from 10 percent in 2007.

Table 9
Washington-Baltimore Regional Airports
Annual Originating Air Passengers Ground Trip Origin
(Thousands of Passengers)

Ground Trip Origin		BWI Marshall			Dulles			Reagan National			REGION		
		2005	2007	2009	2005	2007	2009	2005	2007	2009	2005	2007	2009
Private residence	<i>Number</i>	5,586	5,769	5,376	4,693	3,895	4,026	3,415	3,627	3,614	13,694	13,291	13,016
	<i>Percent</i>	65%	66%	61%	69%	62%	61%	47%	44%	46%	61%	57%	56%
Hotel/motel	<i>Number</i>	1,708	1,893	2,073	1,296	1,676	1,813	2,804	3,288	2,992	5,808	6,857	6,878
	<i>Percent</i>	20%	22%	24%	19%	27%	27%	38%	40%	38%	26%	30%	29%
Passenger's regular place of employment	<i>Number</i>	430	409	436	298	296	242	360	465	464	1,088	1,170	1,142
	<i>Percent</i>	5%	5%	5%	4%	5%	4%	5%	6%	6%	5%	5%	5%
Another place of business	<i>Number</i>	481	410	446	313	281	268	624	668	541	1,418	1,359	1,255
	<i>Percent</i>	6%	5%	5%	5%	4%	4%	9%	8%	7%	6%	6%	5%
Other	<i>Number</i>	333	212	446	176	131	303	104	218	286	613	561	1,035
	<i>Percent</i>	4%	2%	5%	3%	2%	5%	1%	3%	4%	3%	2%	4%
TOTAL	<i>Number</i>	8,538	8,693	8,777	6,776	6,279	6,652	7,307	8,266	7,897	22,621	23,238	23,326
	<i>Percent</i>	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Non-Respondents		67	96	121	100	197	246	71	70	154	238	363	521
Total Originations		8,605	8,789	8,898	6,876	6,476	6,898	7,378	8,336	8,051	22,859	23,601	23,847

Notes:

* Totals may not add due to rounding

An analysis of mode of access by resident status shows some interesting differences. Figure 5 illustrates this for the region. While residents of the region overwhelmingly used the private auto to access an airport, 73 percent in 2009, air passengers visiting the region continued to be more evenly distributed among private autos (35%), rental cars (22%) and taxicabs (18%). This percentage split also occurred 2005 and 2007. Non-resident air passengers were also more likely than resident air travelers to use rail transit for ground access to the airport.

Tables 11 to 14 summarize resident versus non-resident (passengers arriving by ground transportation only) mode of access, to each airport and for the region as a whole.

*Figure 5
Departing Passengers Mode of Access
by Resident Status*

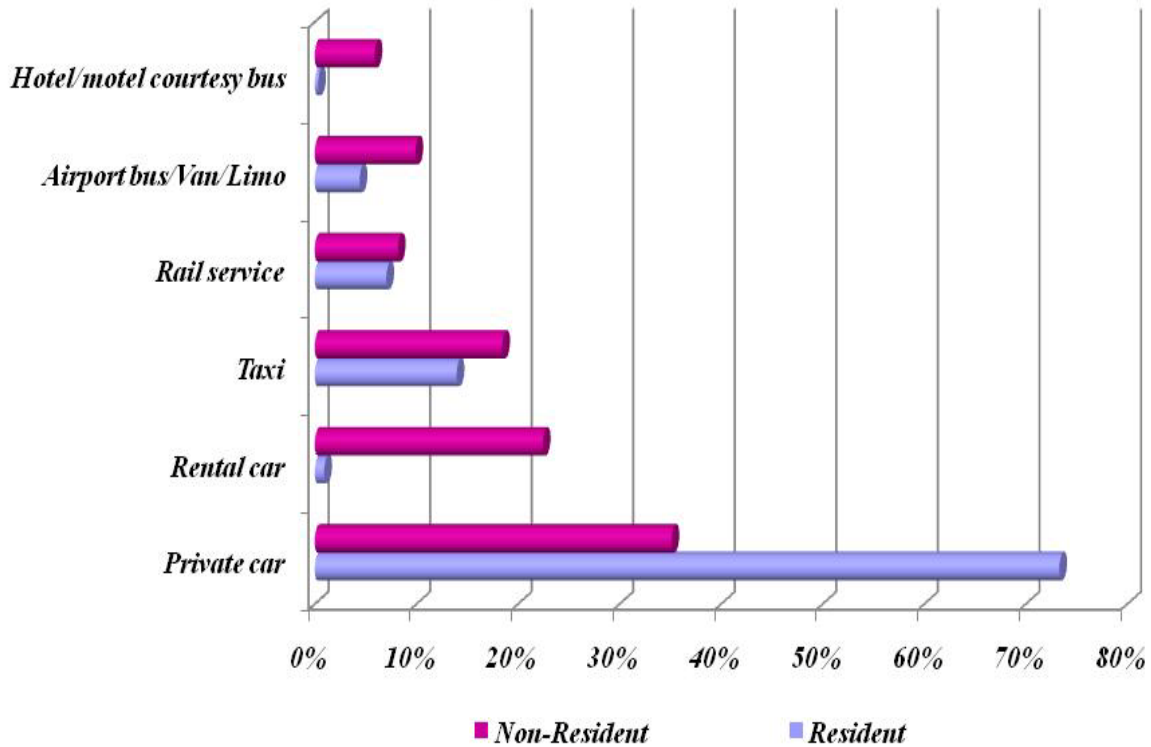


Table 10
Washington-Baltimore Regional Airports
Annual Originating Air Passengers Mode of Access
(Thousands of Passengers)

Mode of Access		BWI Marshall			Dulles			Reagan National			REGION		
		2005	2007	2009	2005	2007	2009	2005	2007	2009	2005	2007	2009
Private car	<i>Number</i>	5,141	5,563	5,189	3,959	3,413	3,537	2,519	2,639	2,524	11,619	11,615	11,249
	<i>Percent</i>	60%	64%	59%	59%	54%	53%	35%	32%	32%	52%	50%	48%
Rental car	<i>Number</i>	1,098	1,478	1,480	660	908	1,017	510	793	652	2,268	3,179	3,149
	<i>Percent</i>	13%	17%	17%	10%	14%	15%	7%	10%	8%	10%	14%	14%
Taxi	<i>Number</i>	593	493	444	1,007	1,018	946	2,486	2,570	2,483	4,086	4,081	3,873
	<i>Percent</i>	7%	6%	5%	15%	16%	14%	34%	31%	32%	18%	18%	17%
Metrorail (DCA)	<i>Number</i>	53	25	60	38	74	77	940	1,116	1,284	1,031	1,215	1,421
	<i>Percent</i>	1%	0%	1%	1%	1%	1%	13%	14%	16%	5%	5%	6%
Rail service	<i>Number</i>	129	140	208	NA	NA	NA	5	5	5	134	145	213
	<i>Percent</i>	2%	2%	2%				0%	0%	0%	1%	1%	1%
Light Rail (BWI)	<i>Number</i>	42	24	66	NA	NA	NA	NA	NA	NA	42	24	66
	<i>Percent</i>	0%	0%	1%							0%	0%	0%
Airport bus/Van/Limo	<i>Number</i>	839	728	803	552	571	648	333	555	444	1,724	1,854	1,895
	<i>Percent</i>	10%	8%	9%	8%	9%	10%	5%	7%	6%	8%	8%	8%
Hotel/motel courtesy bus	<i>Number</i>	406	244	260	282	290	199	422	545	380	1,110	1,079	839
	<i>Percent</i>	5%	3%	3%	4%	5%	3%	6%	7%	5%	5%	5%	4%
Other	<i>Number</i>	227	10	223	215	33	196	67	16	109	509	59	528
	<i>Percent</i>	3%	0%	3%	3%	1%	3%	1%	0%	1%	2%	0%	2%
TOTAL	<i>Number</i>	8,528	8,705	8,732	6,713	6,307	6,620	7,282	8,239	7,881	22,523	23,251	23,232
	<i>Percent</i>	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Non-Respondents		77	86	164	163	174	275	96	101	169	336	361	608
Total Originations		8,605	8,791	8,896	6,876	6,481	6,895	7,378	8,340	8,050	22,859	23,612	23,841

Notes:

* Totals may not add due to rounding

Table 11
Washington-Baltimore Regional Airports
Annual Originating Air Passengers Mode of Access by Resident Status - BWI Marshall Airport
(Thousands of Originations)

		BWI Marshall								
Mode of Access		Non-Residents			Residents			TOTAL		
		2005	2007	2009	2005	2007	2009	2005	2007	2009
Private car	<i>Number</i>	1,477	1,841	2,001	3,136	3,035	2,547	4,613	4,876	4,548
	<i>Percent</i>	40%	44%	42%	79%	87%	87%	60%	63%	59%
Rental car	<i>Number</i>	967	1,300	1,321	47	33	43	1,014	1,333	1,364
	<i>Percent</i>	26%	31%	27%	1%	1%	1%	13%	17%	18%
Taxi	<i>Number</i>	331	323	305	195	108	65	526	431	370
	<i>Percent</i>	9%	8%	6%	5%	3%	2%	7%	6%	5%
Metrorail (DCA)	<i>Number</i>	28	11	47	23	11	11	51	22	58
	<i>Percent</i>	1%	0%	1%	1%	0%	0%	1%	0%	1%
Rail service	<i>Number</i>	78	76	122	39	57	69	117	133	191
	<i>Percent</i>	2%	2%	3%	1%	2%	2%	2%	2%	2%
Light Rail (BWI)	<i>Number</i>	21	14	45	14	10	12	35	24	56
	<i>Percent</i>	1%	0%	1%	0%	0%	0%	0%	0%	1%
Airport bus/ Van/Limo	<i>Number</i>	416	419	573	350	227	140	766	646	713
	<i>Percent</i>	11%	10%	12%	9%	6%	5%	10%	8%	9%
Hotel/motel courtesy bus	<i>Number</i>	336	211	224	48	17	18	384	228	242
	<i>Percent</i>	9%	5%	5%	1%	0%	1%	5%	3%	3%
Other	<i>Number</i>	49	5	174	121	0	32	170	5	206
	<i>Percent</i>	1%	0%	4%	3%	0%	1%	2%	0%	3%
TOTAL	<i>Number</i>	3,703	4,200	4,812	3,973	3,498	2,937	7,676	7,698	7,750
	<i>Percent</i>	100%	100%	100%	100%	100%	100%	100%	100%	100%

Notes:

* Totals do not include resident unknown, and non-respondents for mode of access.

Table 12
Washington-Baltimore Regional Airports
Annual Originating Air Passengers Mode of Access by Resident Status - Reagan National Airport
(Thousands of Originations)

		Reagan National								
Mode of Access		Non-Residents			Residents			TOTAL		
		2005	2007	2009	2005	2007	2009	2005	2007	2009
Private car	<i>Number</i>	641	876	861	1,580	1,413	1,353	2,221	2,289	2,214
	<i>Percent</i>	17%	19%	19%	59%	55%	53%	34%	31%	32%
Rental car	<i>Number</i>	402	679	581	34	62	15	436	741	596
	<i>Percent</i>	10%	14%	13%	1%	2%	1%	7%	10%	9%
Taxi	<i>Number</i>	1,684	1,739	1,555	601	584	653	2,285	2,323	2,209
	<i>Percent</i>	44%	37%	35%	23%	23%	26%	35%	32%	32%
Metrorail (DCA)	<i>Number</i>	513	602	722	359	421	444	872	1,023	1,166
	<i>Percent</i>	13%	13%	16%	13%	16%	17%	13%	14%	17%
Rail service	<i>Number</i>	1	0	3	2	0	1	3	0	4
	<i>Percent</i>	0%	0%	0%	0%	0%	0%	0%	0%	0%
Light Rail (BWI)	<i>Number</i>	NA	NA	NA	NA	NA	NA	NA	NA	NA
	<i>Percent</i>									
Airport bus/ Van/Limo	<i>Number</i>	222	401	301	78	99	67	300	500	368
	<i>Percent</i>	6%	8%	7%	3%	4%	3%	5%	7%	5%
Hotel/motel courtesy bus	<i>Number</i>	336	417	346	6	6	5	342	423	351
	<i>Percent</i>	9%	9%	8%	0%	0%	0%	5%	6%	5%
Other	<i>Number</i>	50	12	82	6	5	8	56	17	90
	<i>Percent</i>	1%	0%	2%	0%	0%	0%	1%	0%	1%
TOTAL	<i>Number</i>	3,849	4,726	4,451	2,666	2,590	2,546	6,515	7,316	6,998
	<i>Percent</i>	100%	100%	100%	100%	100%	100%	100%	100%	100%

Notes:

* Totals do not include resident unknown, and non-respondents for mode of access.

Table 13
Washington-Baltimore Regional Airports
Annual Originating Air Passengers Mode of Access by Resident Status - Dulles Airport
(Thousands of Originations)

		Dulles								
Mode of Access		Non-Residents			Residents			TOTAL		
		2005	2007	2009	2005	2007	2009	2005	2007	2009
Private car	<i>Number</i>	1,050	876	1,170	2,306	1,914	1,774	3,356	2,790	2,944
	<i>Percent</i>	45%	37%	40%	72%	76%	76%	61%	57%	56%
Rental car	<i>Number</i>	506	711	796	44	27	15	550	738	811
	<i>Percent</i>	22%	30%	27%	1%	1%	1%	10%	15%	15%
Taxi	<i>Number</i>	266	331	358	579	413	380	845	744	737
	<i>Percent</i>	11%	14%	12%	18%	16%	16%	15%	15%	14%
Metrorail (DCA)	<i>Number</i>	20	39	43	8	11	17	28	50	61
	<i>Percent</i>	1%	2%	1%	0%	0%	1%	1%	1%	1%
Rail service	<i>Number</i>	NA	NA	NA	NA	NA	NA	NA	NA	NA
	<i>Percent</i>									
Light Rail (BWI)	<i>Number</i>	NA	NA	NA	NA	NA	NA	NA	NA	NA
	<i>Percent</i>									
Airport bus/ Van/Limo	<i>Number</i>	246	282	317	222	144	140	468	426	457
	<i>Percent</i>	10%	12%	11%	7%	6%	6%	8%	9%	9%
Hotel/motel courtesy bus	<i>Number</i>	168	115	137	28	10	3	196	125	140
	<i>Percent</i>	7%	5%	5%	1%	0%	0%	4%	3%	3%
Other	<i>Number</i>	95	13	120	9	0	13	104	13	133
	<i>Percent</i>	4%	1%	4%	0%	0%	1%	2%	0%	3%
TOTAL	<i>Number</i>	2,351	2,367	2,941	3,196	2,519	2,342	5,547	4,886	5,284
	<i>Percent</i>	100%	100%	100%	100%	100%	100%	100%	100%	100%

Notes:

* Totals do not include resident unknown, and non-respondents for mode of access.

Table 14
Washington-Baltimore Regional Airports
Annual Originating Air Passengers Mode of Access by Resident Status - REGION Airports
(Thousands of Originations)

Mode of Access		REGION								
		Non-Residents			Residents			TOTAL		
		2005	2007	2009	2005	2007	2009	2005	2007	2009
Private car	<i>Number</i>	3,168	3,593	4,033	7,022	6,362	5,674	10,190	9,955	9,706
	<i>Percent</i>	32%	32%	33%	71%	74%	72%	52%	50%	48%
Rental car	<i>Number</i>	1,875	2,690	2,698	125	122	73	2,000	2,812	2,771
	<i>Percent</i>	19%	24%	22%	1%	1%	1%	10%	14%	14%
Taxi	<i>Number</i>	2,281	2,393	2,218	1,375	1,105	1,098	3,656	3,498	3,316
	<i>Percent</i>	23%	21%	18%	14%	13%	14%	19%	18%	17%
Metrorail (DCA)	<i>Number</i>	561	652	812	390	443	472	951	1,095	1,284
	<i>Percent</i>	6%	6%	7%	4%	5%	6%	5%	6%	6%
Rail service	<i>Number</i>	79	76	126	41	57	70	120	133	195
	<i>Percent</i>	1%	1%	1%	0%	1%	1%	1%	1%	1%
Light Rail (BWI)	<i>Number</i>	21	14	45	14	10	12	35	24	56
	<i>Percent</i>	0%	0%	0%	0%	0%	0%	0%	0%	0%
Airport bus/ Van/Limo	<i>Number</i>	884	1,102	1,191	650	470	347	1,534	1,572	1,538
	<i>Percent</i>	9%	10%	10%	7%	5%	4%	8%	8%	8%
Hotel/motel courtesy bus	<i>Number</i>	840	743	707	82	33	27	922	776	734
	<i>Percent</i>	8%	7%	6%	1%	0%	0%	5%	4%	4%
Other	<i>Number</i>	194	30	376	136	5	54	330	35	429
	<i>Percent</i>	2%	0%	3%	1%	0%	1%	2%	0%	2%
TOTAL	<i>Number</i>	9,903	11,293	12,205	9,835	8,607	7,826	19,738	19,900	20,031
	<i>Percent</i>	100%	100%	100%	100%	100%	100%	100%	100%	100%

Notes:

* Totals do not include resident unknown, and non-respondents for mode of access.

Air Traveler Characteristics

Section D of the survey questionnaire contained several questions regarding demographic characteristics of the air passenger. This section of the report summarizes the results of the responses to these questions.

Resident Status

Table 15 summarizes resident status for locally originating air passengers in 2009, 2007, and 2005. In 2005, there was a significant increase in the percentage of locally originating air passengers who are area residents and a subsequent drop in the percentage who are non-residents. For the first time in any of the Washington-Baltimore regional air passenger surveys, a 50/50 split between resident and non-resident air passengers was seen in 2005. However, in 2009, the expected 60 percent non-resident 40 percent resident split was observed, similar to pre-2005 survey results. It can be concluded that the 50/50 split observed in 2005 could be attributed to seasonal factors.

Table 15
Washington-Baltimore Regional Airports
Annual Originating Air Passengers Resident Status
(Thousands of Passengers)

Resident Status		BWI Marshall			Dulles			Reagan National			REGION		
		2005	2007	2009	2005	2007	2009	2005	2007	2009	2005	2007	2009
Resident	<i>Number</i>	3,989	3,524	2,969	3,230	2,544	2,365	2,685	2,604	2,579	9,904	8,672	7,913
	<i>Percent</i>	52%	46%	38%	58%	51%	44%	41%	35%	36%	50%	43%	39%
Non-Resident	<i>Number</i>	3,732	4,216	4,869	2,377	2,418	3,013	3,881	4,745	4,511	9,990	11,379	12,393
	<i>Percent</i>	48%	54%	62%	42%	49%	56%	59%	65%	64%	50%	57%	61%
TOTAL	<i>Number</i>	7,721	7,740	7,838	5,607	4,962	5,378	6,566	7,349	7,090	19,894	20,051	20,306
	<i>Percent</i>	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Notes:

* Totals do not include non-respondents and resident unknown

* Totals may not add due to rounding

Age

Between 2005 and 2007, the percentage of locally originating air passengers under the age of 25 declined from 16 to 9 percent, while the percentage of passengers age 35 and older increased from 67 percent in 2005 to 71 percent in 2007. This shift in age of departing passengers could be attributed to seasonal factors. However, in 2009, the percentage of locally originating air passengers under the age of 25 increased slightly to 11 percent when compared with 2007. Departing passengers over the age of 65 years show a continuous trend of growth between 2005 and 2009. Table 16 provides the detailed age distribution for passengers at the three airports and the region as a whole.

Income

Air travelers in the Washington-Baltimore region continue to be affluent. Table 17 shows originating air passengers household income data at the three airports and the region. In 2009, 47 percent of the region's originating air passengers had household incomes of at least \$120,000. This is somewhat similar when compared with 2005 and 2007 in which the same percentage of passengers had an annual household income of less than \$100,000. At BWI Marshall, 58 percent of departing passengers had a household income less than \$120,000, at National it was 47 percent and at Dulles 53 percent, in 2009. Air travelers at Reagan National had slightly higher household incomes than passengers at Dulles and BWI Marshall.

Comparison of residents and non-residents departing passengers' household income show that over half of area residents have annual household income over \$120,000 while almost 56 percent of non-residents departing passengers make below that. This finding demonstrates that air travelers from the Washington-Baltimore region are affluent.

Table 16
Washington-Baltimore Regional Airports
Annual Originating Air Passengers Respondents Age
(Thousands of Passengers)

Age Roup		BWI Marshall			Dulles			Reagan National			REGION		
		2005	2007	2009	2005	2007	2009	2005	2007	2009	2005	2007	2009
18 or Younger	Number	486	238	416	427	107	210	228	77	96	1,141	422	722
	Percent	6%	3%	5%	7%	2%	3%	4%	1%	1%	6%	2%	3%
19 to 24 Years	Number	847	664	732	614	289	422	505	497	480	1,966	1,450	1,634
	Percent	11%	8%	9%	10%	5%	7%	8%	7%	7%	10%	7%	8%
25 to 34 Years	Number	1,321	1,472	1,414	1,091	1,083	1,058	1,165	1,528	1,607	3,577	4,083	4,079
	Percent	17%	19%	18%	18%	20%	17%	18%	20%	22%	18%	19%	19%
35 to 49 Years	Number	2,674	2,324	2,220	1,923	1,868	2,004	2,213	2,536	2,287	6,810	6,728	6,511
	Percent	34%	30%	27%	32%	34%	33%	34%	34%	31%	33%	32%	30%
50 to 64 Years	Number	2,012	2,523	2,500	1,649	1,694	1,783	1,992	2,358	2,257	5,653	6,575	6,540
	Percent	26%	32%	31%	27%	31%	29%	31%	31%	31%	28%	31%	30%
65 or Older	Number	469	652	796	318	510	627	409	553	637	1,196	1,715	2,060
	Percent	6%	8%	10%	5%	9%	10%	6%	7%	9%	6%	8%	10%
TOTAL	Number	7,809	7,873	8,078	6,022	5,551	6,104	6,512	7,549	7,364	20,343	20,973	21,546
	Percent	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Non-Respondents		796	915	817	854	929	788	866	787	685	2,516	2,631	2,290
Total Originations		8,605	8,788	8,895	6,876	6,480	6,892	7,378	8,336	8,049	22,859	23,604	23,836

Notes:

* Totals may not add due to rounding

Table 17
Washington-Baltimore Regional Airports
Annual Originating Air Passengers Respondent Household Income
(Thousands of Originations)

Household Income		BWI Marshall		Dulles		Reagan National		TOTAL	
		2007	2009	2007	2009	2007	2009	2007	2009
Less than \$15,000	Number	168	296	128	190	141	164	437	650
	Percent	2%	4%	3%	4%	2%	3%	2%	4%
\$15,000 - 24,999	Number	147	188	124	125	83	124	354	437
	Percent	2%	3%	3%	2%	1%	2%	2%	2%
\$25,000 - 44,999	Number	583	440	255	336	420	353	1,258	1,129
	Percent	9%	6%	5%	7%	6%	6%	7%	6%
\$45,000 - 79,999	Number	1,346	1,354	722	958	1,100	911	3,168	3,223
	Percent	20%	20%	15%	19%	17%	15%	17%	18%
\$80,000 - 119,999	Number	1,715	1,678	1,108	1,128	1,637	1,394	4,460	4,200
	Percent	25%	24%	23%	22%	25%	22%	25%	23%
\$120,000 - 159,999	Number	1,104	1,181	844	861	1,021	1,084	2,969	3,126
	Percent	16%	17%	18%	17%	16%	17%	16%	17%
\$160,000 - 199,999	Number	651	593	505	519	632	674	1,788	1,786
	Percent	10%	9%	11%	10%	10%	11%	10%	10%
\$200,000 and up	Number	1,101	1,138	1,089	1,045	1,497	1,555	3,687	3,738
	Percent	16%	17%	23%	20%	23%	25%	20%	20%
TOTAL	Number	6,815	6,868	4,775	5,162	6,531	6,259	18,121	18,289
	Percent	100%	100%	100%	100%	100%	100%	100%	100%
Non-Respondents		1,974	2,034	1,974	1,733	1,974	1,788	5,922	5,555
Total Originations		8,789	8,902	6,749	6,895	8,505	8,047	24,043	23,844

Notes:

* Totals may not add due to rounding

Boarding Pass and Bag Checking

The content of the Regional Air Passenger Survey questionnaire, while substantially similar to that of previous versions, did incorporate some changes since 2009. Most notably, passengers were asked where and if passengers had made a stop for boarding pass and/or bag check at the following:-

- A. Curbside agent for boarding pass
- B. Curbside agent for bag check
- C. E-ticket kiosk for boarding pass
- D. E-ticket kiosk for bag check
- E. Ticket agent in terminal for boarding pass
- F. Ticket agent in terminal for bag check
- G. None of the above

Table 18 shows distribution of originating air passengers activities for boarding pass and bag checking at airport terminals. Overall 77 percent of departing passengers reported to have made a stop for boarding pass and/or bag check, 75 percent at BWI Marshall, 76 percent at Dulles and 81 percent at Reagan National, while 20 percent of departing passengers reported to have made no stop for either boarding pass and/or bag check, 24 percent at BWI Marshall, 20 percent at Dulles and 18 percent at Reagan National.

Among passengers who reported to have made a stop for boarding pass and/or bag check, 55 percent used the E-ticket Kiosk, 50 percent at BWI Marshall, 52 percent at Dulles and 62 percent at Reagan National, while 30 percent made a stop at the Terminal Ticket Agent, 31 percent at BWI Marshall, 36 percent at Dulles and 23 percent at Reagan National. Passengers have also used airport terminal airline Curbside facilities for boarding pass and/or bag checking services. Overall 15 percent of passengers have reported using the curbside facilities for these services, 18 percent at BWI Marshall, 12 percent at Dulles and 14 percent at Reagan National.

Comparison of domestic and international destined departing passengers show that among domestic overall 77 percent stopped for boarding pass and/or bag check, 75

percent at BWI Marshall, 74 percent at Dulles and 80 percent at Reagan National. Among international destined flight departing passengers, overall 82 percent stopped for boarding pass and/or bag check 84 percent at BWI Marshall, 81 percent at Dulles and 90 percent at Reagan National. Table 19 shows departing passengers distribution activities for boarding pass and bag checking at airport terminals by destination. Table 20 presents their distribution by airport.

Table 18
Washington-Baltimore Regional Airports
Annual Originating Air Passengers Respondent At Airport use of Boarding Pass and Bag Check Facilities
(Thousands of Originations)

Passengers at Airport Boarding Pass and Bag Check		BWI Marshall	Dulles	Reagan National	TOTAL
Only stopped at Curbside for Boarding Pass	<i>Number</i>	178	98	116	392
	<i>Percent</i>	2%	1%	1%	2%
Only stopped at Curbside for Bag Check	<i>Number</i>	486	179	206	871
	<i>Percent</i>	5%	3%	3%	4%
Only stopped at E-ticket Kiosk for Boarding Pass	<i>Number</i>	1,334	1,035	2,033	4,401
	<i>Percent</i>	15%	15%	25%	18%
Only stopped at E-ticket Kiosk for Bag Check	<i>Number</i>	781	593	455	1,830
	<i>Percent</i>	9%	9%	6%	8%
Only stopped at Ticket Agent for Boarding Pass	<i>Number</i>	625	600	653	1,879
	<i>Percent</i>	7%	9%	8%	8%
Only stopped at Ticket Agent for Bag Check	<i>Number</i>	746	449	416	1,611
	<i>Percent</i>	8%	7%	5%	7%
Stopped at Curbside for Boarding Pass and Bag Check	<i>Number</i>	386	153	388	928
	<i>Percent</i>	4%	2%	5%	4%
Stopped at E-ticket Kiosk for Boarding Pass and Bag Check	<i>Number</i>	723	501	821	2,045
	<i>Percent</i>	8%	7%	10%	9%
Stopped at Ticket Agent for Boarding Pass and Bag Check	<i>Number</i>	702	813	445	1,960
	<i>Percent</i>	8%	12%	6%	8%
Stopped at Curbside and E-ticket Kiosk for Boarding Pass and Bag Check	<i>Number</i>	10	12	18	40
	<i>Percent</i>	0%	0%	0%	0%
Stopped at Curbside and Ticket Agent for Boarding Pass and Bag Check	<i>Number</i>	6	36	13	55
	<i>Percent</i>	0%	1%	0%	0%
Stopped at E-ticket Kiosk and Ticket Agent for Boarding Pass and Bag Check	<i>Number</i>	58	60	65	183
	<i>Percent</i>	1%	1%	1%	1%
Stopped at more than place for Boarding Pass and Bag Check	<i>Number</i>	618	704	856	2,179
	<i>Percent</i>	7%	10%	11%	9%
Did Not stop for Boarding Pass or Bag Check	<i>Number</i>	2,099	1,372	1,409	4,880
	<i>Percent</i>	24%	20%	18%	20%
Non Respondents	<i>Number</i>	143	288	155	587
	<i>Percent</i>	2%	4%	2%	2%
Total	<i>Number</i>	8,896	6,895	8,050	23,841
	<i>Percent</i>	100%	100%	100%	100%

Notes:

* Totals may not add due to rounding

Table 19
Washington-Baltimore Regional Airports
Annual Originating Air Passengers Respondent At Airport use of Boarding Pass and Bag Check Facilities
by Departing Flight Destination
(Thousands of Originations)

Passengers at Airport		Domestic	International	Total
Boarding Pass and Bag Check				
Only stopped at Curbside for Boarding Pass	<i>Number</i>	355	38	392
	<i>Percent</i>	2%	2%	2%
Only stopped at Curbside for Bag Check	<i>Number</i>	850	21	871
	<i>Percent</i>	4%	1%	4%
Only stopped at E-ticket Kiosk for Boarding Pass	<i>Number</i>	4,282	120	4,401
	<i>Percent</i>	20%	6%	18%
Only stopped at E-ticket Kiosk for Bag Check	<i>Number</i>	1,692	137	1,830
	<i>Percent</i>	8%	7%	8%
Only stopped at Ticket Agent for Boarding Pass	<i>Number</i>	1,592	287	1,879
	<i>Percent</i>	7%	14%	8%
Only stopped at Ticket Agent for Bag Check	<i>Number</i>	1,440	171	1,611
	<i>Percent</i>	7%	8%	7%
Stopped at more than place for Boarding Pass and/or Bag Check	<i>Number</i>	6,450	940	7,390
	<i>Percent</i>	30%	45%	31%
Did Not stop for Boarding Pass or Bag Check	<i>Number</i>	4,612	268	4,880
	<i>Percent</i>	21%	13%	20%
Non Respondents	<i>Number</i>	472	115	587
	<i>Percent</i>	2%	5%	2%
Total	<i>Number</i>	21,744	2,097	23,841
	<i>Percent</i>	100%	100%	100%

Notes:

* Totals may not add due to rounding

Among passengers who used the curbside only, for boarding pass and/or to check in their bags, overall 82 percent stopped for bag check and boarding pass while 18 percent did so for boarding pass only. On the other hand analysis of passengers who used the e-ticket kiosk only, overall 47 percent stopped for bag check and boarding pass while 53 percent did so for boarding pass only. Similarly of passengers who used ticket agent service only, overall 66 percent stopped for bag check and boarding pass while 34 percent did so for boarding pass only.

2009 Washington-Baltimore Regional Air Passenger Survey

Table 20
Washington-Baltimore Regional Airports
Annual Originating Air Passengers Respondent At Airport use of Boarding Pass and Bag Check Facilities
by Departing Flight Destination and Airport
(Thousands of Originations)

Passengers at Airport Boarding Pass and Bag Check		Domestic				International				Grand Total
		BWI	IAD	DCA	Total	BWI	IAD	DCA	Total	
Only stopped at Curbside for Boarding Pass	Number	177	63	114	355	2	35	1	38	392
	Percent	2%	1%	1%	2%	1%	2%	1%	2%	2%
Only stopped at Curbside for Bag Check	Number	485	161	204	850	2	18	2	21	871
	Percent	6%	3%	3%	4%	1%	1%	1%	1%	4%
Only stopped at E-ticket Kiosk for Boarding Pass	Number	1,333	937	2,012	4,282	1	98	21	120	4,401
	Percent	15%	18%	25%	20%	0%	6%	15%	6%	18%
Only stopped at E-ticket Kiosk for Bag Check	Number	773	465	455	1,692	9	129	0	137	1,830
	Percent	9%	9%	6%	8%	4%	7%	0%	7%	8%
Only stopped at Ticket Agent for Boarding Pass	Number	576	374	642	1,592	50	226	11	287	1,879
	Percent	7%	7%	8%	7%	23%	13%	8%	14%	8%
Only stopped at Ticket Agent for Bag Check	Number	710	333	397	1,440	37	116	18	171	1,611
	Percent	8%	6%	5%	7%	17%	7%	13%	8%	7%
Stopped at more than place for Boarding Pass and/or Bag Check	Number	2,420	1,493	2,536	6,450	83	787	71	940	7,390
	Percent	28%	29%	32%	30%	38%	45%	51%	45%	31%
Did Not stop for Boarding Pass or Bag Check	Number	2,072	1,143	1,397	4,612	26	230	12	268	4,880
	Percent	24%	22%	18%	21%	12%	13%	9%	13%	20%
Non Respondents	Number	135	183	153	472	8	105	2	115	587
	Percent	2%	4%	2%	2%	3%	6%	2%	5%	2%
Total	Number	8,680	5,153	7,911	21,744	216	1,742	139	2,097	23,841
	Percent	100%	100%	100%	100%	100%	100%	100%	100%	100%

Notes:

* Totals may not add due to rounding

APPENDIX A
SURVEY METHODOLOGY

SURVEY METHODOLOGY

The following discussion is a brief summary of the methodology used to conduct the 2009 Washington-Baltimore Regional Air Passenger Survey.

Survey Design

The survey was designed to provide current air traffic patterns and user characteristics for passengers departing from the region's three major commercial airports (Ronald Reagan Washington National, Washington Dulles International and Baltimore/Washington International Airports). It was designed to be compatible with the previous surveying efforts, done in 1981/82, 1987, 1992, 1998, 2000, 2002, 2005 and 2007, so comparative analysis could be performed.

Scheduled domestic, commuter and international flights were surveyed at each airport, where applicable. The sample for domestic flights was stratified by different regions of the United States: Northeast, New York Metropolitan Area, Mid-Atlantic, Southeast, Great Lakes, and West. For international flights, the sample was stratified into twenty four different regions of the world. All flights selected for surveying were scheduled during a two-week period beginning October 7th and extending through October 20th, 2007. Flights that were missed and those that required resurveying due to insufficient response rates were to be surveyed during the following two-week period.

Sample Selection

A sample of departing air travelers was obtained by surveying all passengers on selected flights scheduled during the survey period. A sample frame was developed which included all scheduled departures during the two-week period. This list was compiled electronically from the Official Airline Guide (OAG), provided by the Metropolitan Washington Airports Authority. The edited sample frames contained one record for each flight leaving from the three airports during a seven-day week (e.g. flights scheduled to

fly seven days a week were included in the sample frame seven times, flights flying six days during the week were included six times, etc.)

To ensure an acceptable level of confidence for parameter estimates while remaining within the budget constraints, a sample of approximately 685 flights was drawn. Since each of the three airports had approximately the same number of domestic departures, 200 domestic flights were selected at each airport. To account for increased international flight activity from the region, additional international flights were selected at each airport.

The sample was then reviewed by the participating airlines. Each airline provided any corrections or changes for their respective flights, and provided a list of any new flights that were to be added during the survey period. These editions were then used to select the final flight sample. The final samples were listed by airport, date, and departure time to enable manpower requirements to be calculated and staff time to be scheduled.

The survey was conducted of departing passengers only. Arriving passengers were not surveyed, primarily due to limited resources. It would also have been difficult to hold arriving passengers' attention as they look for a connecting flight, or hurry through the airport to ground transportation. It is assumed, therefore, that the characteristics of arriving passengers would mirror those of the departing passengers surveyed. This is a hypothesis that should be tested in a future survey.

Conducting the Survey

The survey was conducted during two weeks in the fall of 2009, Sunday, October 11th through Saturday, October 24th. A small number of flights that were either missed or required resurveying were done during the following week. Survey managers were appointed for each of the airports from MWCOG staff, and teams of surveyors were assembled. One or two surveyors were assigned to each flight that was selected, based on the size of aircraft and how many passengers were expected. Self-administered questionnaires were distributed to the passengers as they checked-in and waited for

boarding, in the gate area. The questionnaires were collected as the passengers completed them, or when the flight was called for boarding. Any late arriving passengers were given a questionnaire and a self-addressed postage paid mail-back envelope and asked to complete it in route and drop it in the mail. A copy of the Survey Procedures for the 2009 Air Passenger Survey is included in this report as Appendix C.

Factoring the Survey Data

It is important to note that, since the survey was conducted over two weeks in October 2009, and not continuously throughout the calendar year, the survey data do not reflect any specific annual period. Rather, the survey as it was conducted represents a “snapshot” of passenger activity, taken during an early fall travel period. It is thought that this survey period should be representative of typical average results.

The survey responses were expanded to represent annual passenger estimates by a three-step process. The survey responses obtained on each sampled flight were first factored up to the boarding count totals (revenue passengers only). This number was obtained from the gate attendant at the closing of each flight. Secondly, the factored survey responses were expanded to represent bi-weekly passenger totals. And lastly, an annualized estimate of regional air travel was obtained by expanding the data from the bi-weekly survey period to an independent annual total.

Geocoding

Trip origin addresses collected the 2009 Air Passenger Survey were geo-coded to the combined COG\TPB and BMC 4,368, Transportation Analysis Zone (TAZ) and the revised Washington-Baltimore 161 Airport Planning Region Aviation Analysis Zone (AAZ) System.

Final File

Once the factoring and geo-coding processes were completed, a final file was created. Additional information regarding the passengers destination and residence status, as well as trip TAZ and AAZ were appended to the factored records. The file format for the final data file for the 2009 Washington-Baltimore Regional Air Passenger is included in this report as Appendix C.

Level of Confidence

For the region as a whole, the theoretical level of error for response totals was expected to be within a range of plus or minus three percentage points. The level of error for each of the individual airports, or by other sub-units, was expected to be higher. Analysis of the survey data indicates that, at a 90 percent level of confidence, parameter at the regional level are within a range of plus or minus three percentage points. Percentages at individual airports are subject to a sampling error of twice that amount.

APPENDIX B
SURVEY QUESTIONNAIRE

C. ABOUT YOUR AIRPORT CHOICE

1. Please rank the three most important reasons for choosing Washington Dulles International Airport for your flight today.

(Please write #1, #2 or #3 in the appropriate spaces)

- _____ Closest airport
- _____ Easy road access
- _____ Convenient limo, bus, or rail service
- _____ Good parking facilities
- _____ More convenient flight times
- _____ Less expensive airfare
- _____ Only airport with non-stop flights
- _____ Only airport that serves market
- _____ Frequent flyer specific airline
- _____ Other

(Specify) _____

2. If you could have arranged the airline schedule for your trip today, which airport would you have PREFERRED to use ? (Please circle ONE answer)

- a. Baltimore/Washington International Thurgood Marshall
- b. Washington Dulles International
- c. Ronald Reagan Washington National
- d. No preference

3. Please indicate which other airport(s) you considered using today. (Please circle ALL answers that apply)

- a. Baltimore/Washington International Thurgood Marshall
- b. Ronald Reagan Washington National
- c. Other airport
- (Specify) _____
- d. Did not consider another airport

4. During the last twelve months, how many flights did you make from each of the following airports?

(Please write a number in the appropriate spaces.

Count today's trip as one flight)

- _____ Baltimore/Washington International Thurgood Marshall
- _____ Washington Dulles International
- _____ Ronald Reagan Washington National

D. ABOUT YOURSELF

1. Please indicate the location of your current residence:

City/County State Zip Code Country

2. How many people live in your household?

_____ People *(Enter '1' if you live alone)*

3. Please circle your age bracket:

- a. 18 or younger
- b. 19-24
- c. 25-34
- d. 35-49
- e. 50-64
- f. 65 or older

4. Please circle the answer that approximates the total household annual income of all persons in your household:

- a. Less than \$15,000
- b. \$15,000-24,999
- c. \$25,000-44,999
- d. \$45,000-79,999
- e. \$80,000-119,999
- f. \$120,000-159,999
- g. \$160,000-199,999
- h. \$200,000 or more

If you were visiting the Washington-Baltimore area, please answer questions #5 and #6, then proceed directly to section E.

5. How many nights did you stay in the area?

_____ Nights *(Enter '0' if you are leaving the same day you arrived)*

6. Approximately how much did you spend PER DAY while you were in the area? (Include expenses which are meals, hotels, rental cars, etc. Do not include airfare. Please circle ONE answer)

- a. Less than \$100
- b. \$100-199
- c. \$200-299
- d. \$300-399
- e. \$400-499
- f. \$500-749
- g. \$750-999
- h. \$1,000 or more

If your air travel begins from this airport please answer Questions #7 and #8 below, then proceed to section E.

7. How many nights will you spend away on this trip?

_____ Nights *(Enter '0' if you are returning today)*

8. How many vehicles are usually available for use at your residence?

_____ Vehicles *(Enter '0' if no vehicles are available)*

E. PLEASE WRITE ANY COMMENTS YOU MAY WISH TO BRING TO OUR ATTENTION BELOW

Again, Thanks For Your Help!

I -

**2009
WASHINGTON-
BALTIMORE
REGIONAL
AIR PASSENGER
SURVEY**

TO DETERMINE LOCAL AIRPORT NEEDS



IAD

This survey is being conducted by:
Metropolitan Washington Council of Governments
Metropolitan Washington Airports Authority
Maryland Aviation Administration
in cooperation with the airlines
serving the region's airports.

This survey concerns your trip today.
Please complete this form, even if you have
received a form on other days.

All answers are confidential.
Personal identification is not required.
Thank you for your cooperation.

A. ABOUT YOUR TRIP TODAY

1. How did you get to Washington Dulles International Airport for this trip?
(Please circle ONE answer)

- a. I came to this airport by GROUND TRANSPORTATION (e.g. auto, taxi, Metro, etc.)
(Please proceed directly to QUESTION #2)
- b. I was on this flight when it arrived at this airport.
(STOP. That is all the information we need)
- c. I made a connection at this airport from a DOMESTIC FLIGHT with _____ Airlines. (Please fill in the name of the airline and STOP. That is all we need to know)
- d. I made a connection at this airport from an INTERNATIONAL FLIGHT with _____ Airlines. (Please fill in the name of the airline and STOP. That is all we need to know)

If you arrived at this airport by GROUND TRANSPORTATION, please complete the rest of this survey.

2. What is the destination of your trip today?

_____	_____
Airport	City
_____	_____
State/Province	Country

3. What type of trip is this?

(Please circle the answer for the main purpose of your travel)

- a. Business related to the federal government (Including military)
- b. Business related to state or local government
- c. Business that is not related to government
- d. Vacation
- e. Personal or family affairs
- f. Student or school related
- g. Other purpose
(Specify) _____



4. Since your arrival at the airport, did you stop at any of the following? (Please circle ALL that apply)

- a. Curbside agent for boarding pass
- b. Curbside agent for bag check
- c. E-ticket kiosk for boarding pass
- d. E-ticket kiosk for bag check
- e. Ticket agent in terminal for boarding pass
- f. Ticket agent in terminal for bag check
- g. None of the above

B. ABOUT YOUR GROUND TRIP TO WASHINGTON DULLES INTERNATIONAL AIRPORT:

1. Where did you start your ground trip to this airport (IAD)?

(Please circle ONE answer)

- a. Private residence
- b. Hotel/Motel
- c. My regular place of employment
- d. Another place of business
- e. Other _____
(Specify)

2. What is the address of the place above?

(If you prefer to provide a less specific geographic location, please indicate the nearest intersection, or building name)

_____	_____	_____
Street Number	Street Name	City Quadrant (e.g. SW, NE)
_____	_____	_____
City	State	Zip Code

3. What time did you begin your trip to the airport today? (Enter time and circle AM or PM)

_____ : _____ AM PM

4. What time did you arrive at the airport today? (Enter time and circle AM or PM)

_____ : _____ AM PM

5. Did any member of your household, friends, or business associates travel to the airport with you?

- a. NO
- b. YES
 - 1. How many? _____
 - 2. Of this group, how many came to board this flight? _____

6. How many checked-in bags on this flight are yours? (Enter '0' if no bags were checked) _____

7. What was your primary means of transportation to this airport?

(Please circle ONE answer)

- a. Private Car
- b. Rented Car
- c. Taxi
- d. Airport bus/van/limo
- e. Other _____
(Specify)
- f. Metrorail (National)
- g. Amtrak/MARC (BWI)
- h. Light Rail (BWI)
- i. Hotel/Motel courtesy bus

8. If you arrived in a private vehicle (excluding rental cars):

a. Were you dropped off at the terminal curbside?

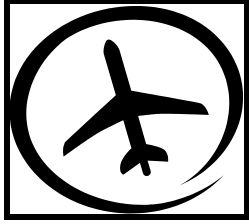
YES _____ NO _____

b. Where was that vehicle parked (either directly or after dropping you off)?

- 1. It was not parked
 - 2. Short term/hourly Parking Lot
 - 3. Long term/daily parking garage
 - 4. Long term/economy parking lot.
 - 5. Valet Parking
- } - For How Long?
- a. For a few hours or less
 - b. Until you return from this trip.



APPENDIX C
SURVEY PROCEDURES



*2009 Washington-Baltimore
Regional Air Passenger Survey*

SURVEY PROCEDURES MANUAL



OCTOBER 2009

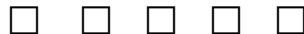
Metropolitan Washington Council of Governments



PERSONNEL REQUIREMENTS

While working on this survey, you will be representing the ***Metropolitan Washington Council of Governments***, the ***Maryland Aviation Administration*** of the Maryland Department of Transportation, the ***Metropolitan Washington Airports Authority***, and to some extent, the airlines themselves. Your appearance must be business-like. It will be easier to conduct the interviews if you present yourself in this manner. Casual attire is not acceptable.

You are expected to engage only in activities or discussions that are directly related to the work of obtaining the information required for the survey.



The success or failure of this survey will be due in large part to your efforts. COG, MAA, and MWAA would like to thank you in advance for your participation in this survey. We are looking forward to conducting a survey that encounters fewer problems and produces even better results than the surveys done in the past.

**MAKE SURE YOU HAVE THE
FOLLOWING**





A. ABOUT YOUR TRIP TODAY

1. How did you get to Washington Dulles International Airport for this trip? (Please circle ONE answer)

- a. I came to this airport by GROUND TRANSPORTATION (e.g. auto, taxi, Metro, etc.) (Please proceed directly to QUESTION #2)
b. I was on this flight when it arrived at this airport. (STOP. That is all the information we need)
c. I made a connection at this airport from a DOMESTIC FLIGHT with Airlines. (Please fill in the name of the airline and STOP. That is all we need to know)
d. I made a connection at this airport from an INTERNATIONAL FLIGHT with Airlines. (Please fill in the name of the airline and STOP. That is all we need to know)

If you arrived at this airport by GROUND TRANSPORTATION, please complete the rest of this survey.

2. What is the destination of your trip today?

Form with fields for Airport, City, State/Province, and Country.

3. What type of trip is this?

(Please circle the answer for the main purpose of your travel)

- a. Business related to the federal government (Including military)
b. Business related to state or local government
c. Business that is not related to government
d. Vacation
e. Personal or family affairs
f. Student or school related
g. Other purpose (Specify)



4. Since your arrival at the airport, did you stop at any of the following? (Please circle ALL that apply)

- a. Curbside agent for boarding pass
b. Curbside agent for bag check
c. E-ticket kiosk for boarding pass
d. E-ticket kiosk for bag check
e. Ticket agent in terminal for boarding pass
f. Ticket agent in terminal for bag check
g. None of the above

B. ABOUT YOUR GROUND TRIP TO WASHINGTON DULLES INTERNATIONAL AIRPORT:

1. Where did you start your ground trip to this airport (IAD)? (Please circle ONE answer)

- a. Private residence
b. Hotel/Motel
c. My regular place of employment
d. Another place of business
e. Other (Specify)

2. What is the address of the place above?

(If you prefer to provide a less specific geographic location, please indicate the nearest intersection, or building name)

Form with fields for Street Number, Street Name, City, Quadrant, and Zip Code.

Form with fields for City, State, and Zip Code.

3. What time did you begin your trip to the airport today? (Enter time and circle AM or PM)

Form with fields for time and AM/PM.

4. What time did you arrive at the airport today? (Enter time and circle AM or PM)

Form with fields for time and AM/PM.

5. Did any member of your household, friends, or business associates travel to the airport with you?

- a. NO
b. YES (1. How many? 2. Of this group, how many came to board this flight?)

6. How many checked-in bags on this flight are yours? (Enter '0' if no bags were checked)

7. What was your primary means of transportation to this airport? (Please circle ONE answer)

- a. Private Car
b. Rented Car
c. Taxi
d. Airport bus/van/limo
e. Other (Specify)
f. Metrorail (National)
g. Amtrak/MARC (BWI)
h. Light Rail (BWI)
i. Hotel/Motel courtesy bus

8. If you arrived in a private vehicle (excluding rental cars):

a. Were you dropped off at the terminal curbside?

Form with YES/NO fields.

b. Where was that vehicle parked (either directly or after dropping you off)?

- 1. It was not parked
2. Short term/hourly Parking Lot
3. Long term/daily parking garage
4. Long term/economy parking lot
5. Valet Parking
- For How Long?
a. For a few hours or less
b. Until you return from this trip.



BWI

B100705WN1865

***GATE ATTENDANTS: PLEASE READ THE FOLLOWING
ANNOUNCEMENT TWICE PRIOR TO THE INITIAL
BOARDING ANNOUNCEMENT FOR THIS FLIGHT.***

(Valid for Flights between October 11, 2009, and November 7, 2009)

“LADIES AND GENTLEMEN”,

**THE PASSENGERS ON *Southwest Airlines, 1865* TO
Orlando FL HAVE BEEN SELECTED TO
PARTICIPATE IN AN AIR PASSENGER SURVEY
BEING CONDUCTED IN THE BALTIMORE-
WASHINGTON REGION.**

**YOUR PARTICIPATION IN THE SURVEY IS
COMPLETELY VOLUNTARY; IT WILL ONLY TAKE A
FEW MINUTES TO COMPLETE THE
QUESTIONNAIRE.**

**A SURVEY REPRESENTATIVE IS HERE TO
DISTRIBUTE THE QUESTIONNAIRES AND COLLECT
THEM WHEN YOU ARE FINISHED.**



2009 WASHINGTON / BALTIMORE REGIONAL AIR PASSENGER SURVEY FLIGHT RECORD

SAMPLE: **B100705WN1865**

AIRPORT: **BWI** DESTINATION CITY **Orlando FL**
 DAY: **SUN** CARRIER **Southwest Airlines**
 DATE: **10/7/2007** FLIGHT **1865**
 DEPARTURE TIME **6:05:00 AM**
 AIRCRAFT: **733** NO. SEATS **137** OAG CODE: **WN**

QUESTIONNAIRES:

IN PACKET: BEGINNING # **B00001** ENDING # **B00137**

ADDITIONAL: BEGINNING # _____ ENDING# _____

ADDITIONAL: BEGINNING # _____ ENDING# _____

NO. OF NON-MAILBACK FORMS DISTRIBUTED: **X**

NO. OF MAILBACKS DISTRIBUTED: **X**

TOTAL NO. OF FORMS DISTRIBUTED: **X**

NO. OF COMPLETED QUESTIONNAIRES; **X**

NO. OF REVENUE PASSENGERS: **X**

RESPONSE RATE: **X** SUCCESSFUL FLIGHT? **YES / NO**

RESURVEY DATE #1: **X** RESURVEY DATE #2: _____

REMARKS: _____





SURVEYING PROCEDURES FOR SURVEY INTERVIEWERS

Upon arriving at the airport each day, surveyors are to go to the field office and check in with the lead assistant on duty. Lead assistants will also be assigned to survey flights.

1. The lead assistant will supply each surveyor with the following:
 - All necessary identification badges;
 - the flight package for the flight(s) to be surveyed. ***It is important that each surveyor double check that you have the correct flight package, and that it contains the correct materials.*** (NOTE: All attempts will be made to group flights to be surveyed that are in the same general areas of the airport. Surveyors, therefore, may not be returning to the field office between flights. When this is the case, the surveyor is to make sure you have all materials needed to survey all flights that have been selected); and,
 - any additional supplies, such as extra questionnaires, pencils, rubber bands, extra mail-back envelopes, etc., and any special instructions for the day.
2. Lead assistants will check the airport schedule monitors and identify the gates at which the selected flights will board, and make sure the surveyors know how to get to those gates. In general, the surveyor should be at the gate at least one hour prior to the flight's scheduled departure time (for international flights, the surveyors should arrive up to an hour and a half early).
3. When you reach the gate, introduce yourself to the gate attendant on duty, and tell them that the flight has been selected to be surveyed. If there are any problems with the gate personnel, leave the gate area immediately and contact the field office. Otherwise, present the gate announcement to the attendant and ask that it be read over the PA system two times during the passenger check-in period. In some instances, the surveyor will make the announcement, if the gate attendants are extremely busy.





4. Once the announcement is first read, approach the passengers who have already checked-in. One suggested introduction would be:

“Good morning (afternoon, evening), we are conducting an air passenger survey at Dulles (BWI, Ronald Reagan National) Airport. Are you waiting to board (flight number) to (flight destination) (for example, United Flight number 127 to Los Angeles)? Would you mind taking a few minutes to fill out this brief questionnaire?”

5. If the passenger agrees, hand him/her a questionnaire and thank them. Inform them that you will be collecting the completed questionnaires before the flight is called for boarding.
6. *If the passenger does not want to participate, thank them anyway and go to the next passenger.*
7. If the passenger identifies him/herself as an airline employee or other non-revenue passenger, ***DO NOT GIVE THEM A QUESTIONNAIRE. Thank them too***
8. Move around the waiting room in an organized fashion, remembering to smile and be as polite as possible.
9. Although we are interested in obtaining information from as many passengers on a flight as possible, there may be situations in which a single passenger can fill out a single questionnaire for more than one passenger:
 - a tour group that is traveling to and from the same destination, especially if the group is non-English speaking.

The passenger who fills out the questionnaire should indicate that the information provided counts for (X) number of passengers. This can be done by placing the number in the box located at the bottom of the comments section. However the passenger who fills out the questionnaire should fill out Section D, [About Yourself](#)





10. After you have distributed questionnaires to the passengers waiting in the boarding area, move toward the check-in desk. Position yourself near the check-in desk, and, as passengers leave the desk, briefly explain the survey and hand them a questionnaire.

IT IS EXTREMELY IMPORTANT THAT YOU DO NOT INTERFERE WITH THE CHECK-IN PROCESS.

11. If the flight package does not contain a sufficient number of questionnaires, use the extra forms that you should be carrying.

Be sure to note the sequence numbers of the extra questionnaires on the survey log sheet.

12. Approximately ten minutes after the first announcement was read, ask the gate attendant to read it a second time, if possible.

13. As boarding time approaches, begin to hand out mail-back envelopes with the questionnaires to all late-arriving passengers, and any others who may not have time to complete the form.

14. At boarding time, the surveyor needs to collect all completed questionnaires while watching for additional late-arriving passengers. Your goal is to try and reach every passenger on that selected flight. If you miss some, it will be acceptable.

ABOVE ALL ELSE, DO NOT INTERFERE WITH THE AIRLINES' BOARDING PROCESSES.

15. After the flight boards, there are two things the surveyors need to do:

- Organize the flight package for the return to the office. Separate completed questionnaires from undistributed ones (and any that were not completed fully). Write down the number of mail-backs you distributed on the flight log; and,





- Obtain the total number of revenue passengers who boarded that flight from the airline gate attendant. Make sure the attendant gives you the *revenue* count. Record this number on the flight log sheet.

- 16. If the boarding process is delayed, try to stay at the gate so you can survey any late-arriving passengers.

- 17. When you have the chance, return to the field office and transfer your notes to the Flight Log.

- 18. When you are not surveying a flight or on a break, help the lead assistant maintain records and prepare for the upcoming flights.

- 19. Before leaving for the day, be sure to verify when your next shift will be, and what flights you are expected to survey.



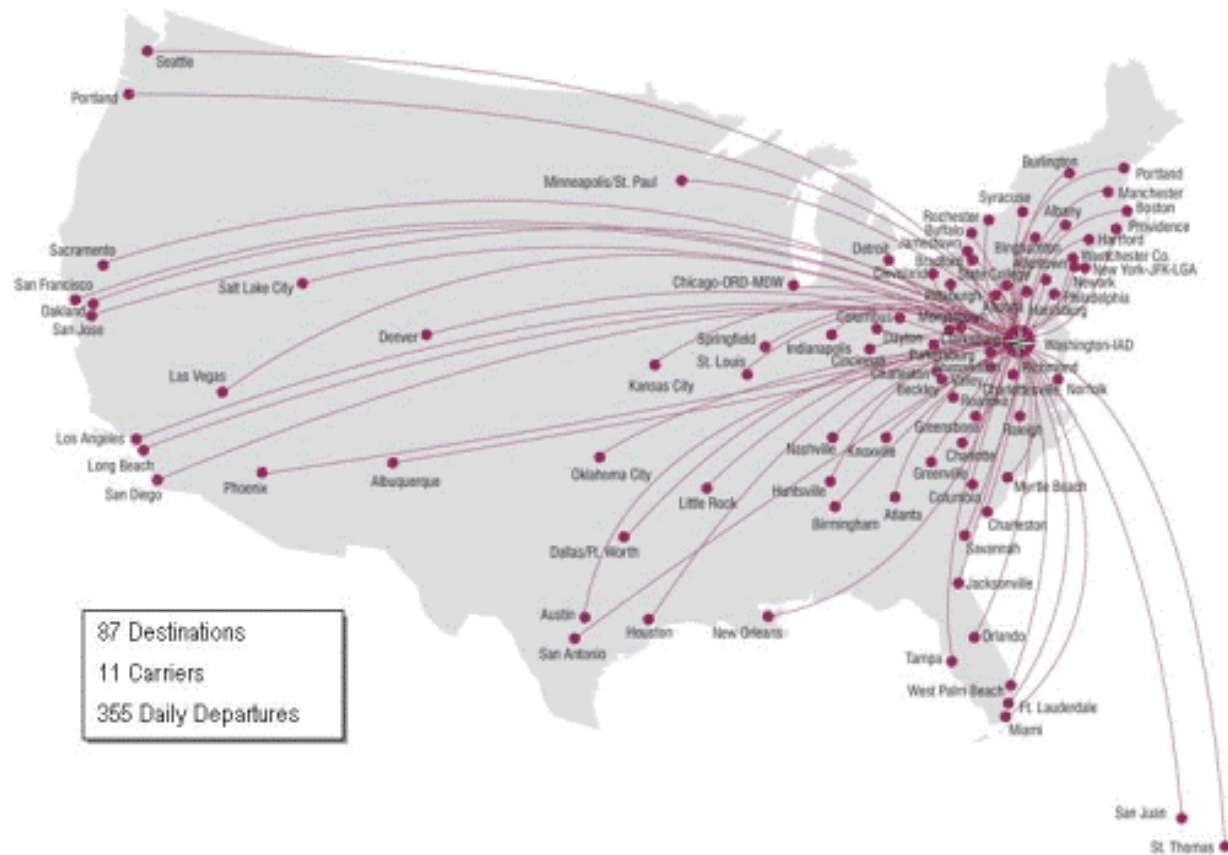


APPENDIX D
Washington-Baltimore
Regional Airports



Domestic Nonstop Service at Washington Dulles

Source: OAG January 25-31, 2008



METROPOLITAN WASHINGTON AIRPORTS AUTHORITY

Baltimore-Washington International Thurgood Marshall Airport

Top Five Passenger Airlines by Market Share CY 2007	Southwest (52.49%)
	AirTran (11.82%)
	Delta (6.56%)
	United (6.44%)
	US Airways (6.40%)
Number of Airlines Providing International Scheduled Service	5
	Air Canada Jazz
	Air Jamaica
	British Airways
	North American
	USA 3000
Number of International Nonstop Scheduled Destinations	8
	Accra, Ghana
	Cancun, Mexico
	Lagos, Nigeria
	La Romana, Dominican Republic
	London, England
	Montego Bay, Jamaica
	Punta Cana, Dominican Republic
	Toronto, Canada
Average Number of Domestic Nonstop Destinations (2/08)	62
Top Five Domestic Origin and Destination Airports to/from BWI in 2007	Orlando, Atlanta, Tampa, Boston and Providence
2006 US Rank according to Airports Council International (ACI)	24th for passengers