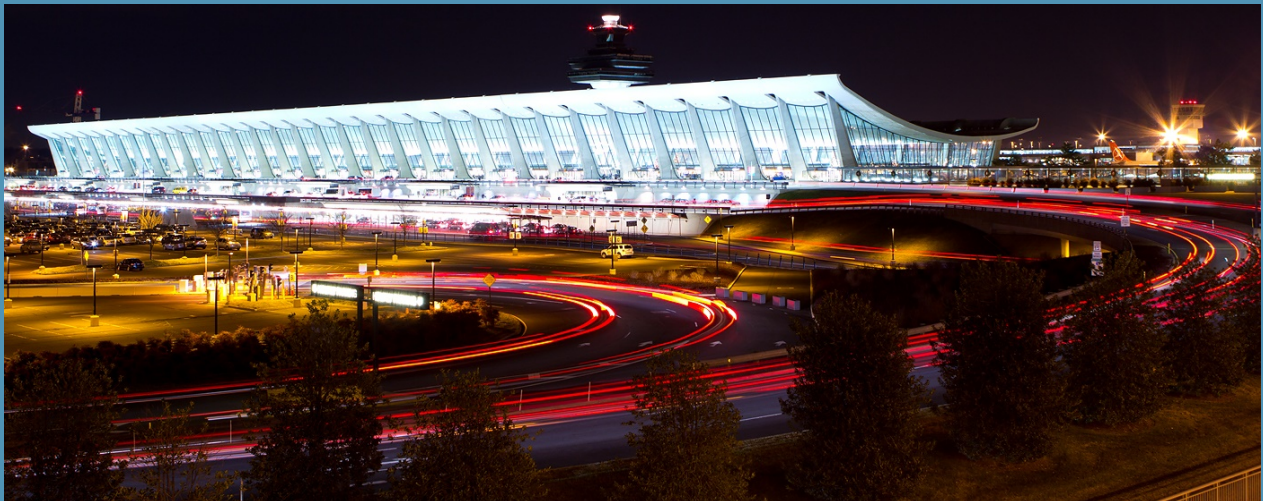
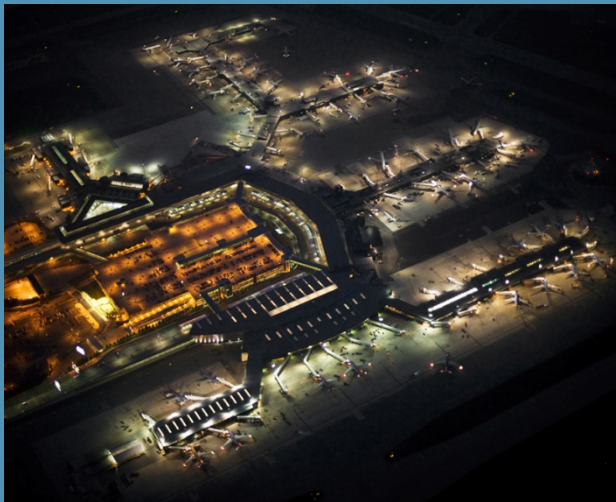


# WASHINGTON-BALTIMORE REGIONAL AIR PASSENGER SURVEY – 2019 **DRAFT** GENERAL FINDINGS

March 2020



National Capital Region  
**Transportation Planning Board**

## **2019 WASHINGTON-BALTIMORE REGIONAL AIR PASSENGER SURVEY – GENERAL FINDINGS**

Prepared by the National Capital Region Transportation Planning Board in cooperation with the Federal Aviation Administration  
March 2020

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## EXECUTIVE SUMMARY

In October 2019, the Metropolitan Washington Council of Governments (MWCOC) conducted a regional air passenger survey (APS) at the three major commercial airports in the Washington-Baltimore Region: Baltimore/Washington International Thurgood Marshall Airport (BWI), Ronald Reagan Washington National Airport (DCA), and Washington Dulles International Airport (IAD). The APS was jointly funded by the Metropolitan Washington Airports Authority (MWAA) and the Maryland Aviation Administration (MAA) of the Maryland Department of Transportation (MDOT). 23,858 out of approximately 90,964 enplaning passengers on 673 randomly selected flights completed survey questionnaires as they waited to board their flights, resulting in an overall response rate of 28.4 percent. The survey questionnaires asked passengers to provide information about their upcoming flight, their trip to the airport, their choice of airport, their spending behavior and their demographic characteristics. The 2019 APS was the fourteenth in a series of regional air passenger surveys conducted since 1981. Prior surveys were conducted in 1981/82, 1987, 1992, 1998, 2000, 2002, and every two years since 2005. Data from the air passenger surveys provide the basis for analysis of major changes in airport use in the region. These surveys are an essential component of the air systems planning and master planning processes in the region and provide information necessary to account for airport ground access in the region's travel demand model.

The Washington/Baltimore air systems planning region shown in Figure 1 stretches from Harford County, Maryland on the Susquehanna River to the north, to Spotsylvania County Virginia to the south, and from the Chesapeake Bay in the east to the foothills of the Appalachian Mountains to the west. This air systems planning region consists of 25 jurisdictions, 161 Aviation Analysis Zones, and 2,604 Transportation Analysis Zones.

The General Findings Report of the 2019 Washington-Baltimore Regional Air Passenger Survey (APS) summarizes findings regarding patterns of airport enplanement share, airport choice, airport preference, air trip purpose, ground trip origin, airport mode of access, spending behavior, air traveler characteristics, and at-airport use of facilities - an overview of which is provided below. The report analyzes these data based on their geographic distribution. 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. This report will be followed by a more detailed report containing geography-specific analysis and conclusions: the Geographic Findings Report of the 2019 Washington-Baltimore Regional Air Passenger Survey.

Figure 1: Washington-Baltimore Air System Planning Region



Source: Washington-Baltimore Regional Air Passenger Survey 2019

## Airport Enplanement Share (Table 2 & Figures 3 - 5)

In 2019, 37.8 million passengers traveled through the Washington-Baltimore Region, an increase of four percent from 2017 (36.4 million). This total is broken down by the percentage of passengers at each airport:

- 36 percent of passengers at BWI (the same as 2017)
- 32 percent of passengers at DCA (down from 33 percent in 2017)
- 33 percent of passengers at IAD (up from 31 percent in 2017)

Of those 37.8 million passengers, 30 million originated locally from the Washington-Baltimore Region, an increase of 12 percent from 2017 (26.7 million), while 7.8 million made a connection through the region; a decrease of 20 percent from 2017 (9.8 million). These totals are broken down by airport below:

### Locally Originating

- 77 percent of passengers at BWI (up from 67 percent in 2017)
- 91 percent of passengers at DCA (up from 88 percent in 2017)
- 71 percent of passengers at IAD (up from 64 percent in 2017)

### Connecting

- 23 percent of passengers at BWI (down from 33 percent in 2017)
- 9 percent of passengers at DCA (down from 12 percent in 2017)
- 29 percent of passengers at IAD (down from 36 percent in 2017)

## Airport Choice (Table 3)

Survey respondents were asked to rank the three most important reasons (out of a list of 10) for choosing the airport they were departing from, of which closest airport (58 percent) lowest airfare (11 percent) and most convenient flight time (10 percent) were the highest ranked.

### Closest Airport

- 61 percent of BWI travelers (up from 59 percent in 2017)
- 69 percent of DCA travelers (down from 70 percent in 2017)
- 44 percent of IAD travelers (down from 47 percent in 2017)

### Lowest Airfare

- 19 percent of BWI travelers (unchanged from 2017)
- 7 percent of DCA travelers (down from 8 percent in 2017)
- 8 percent of IAD travelers (down from 16 percent in 2017)

### Convenient Flight Time

- 7 percent of BWI travelers (unchanged from 2017)
- 8 percent of DCA travelers (unchanged from 2017)
- 17 percent of IAD travelers (up from 15 percent in 2017)



## Airport Preference (Table 4)

- In 2019 overall airport preference was distributed as follows: BWI (34 percent), DCA (45 percent), and IAD (22 percent). Airport preference is disaggregated below by resident status.
  - Area resident: BWI (39 percent), DCA (37 percent), and IAD (24 percent).
  - Non-resident: BWI (29 percent), DCA (50 percent), and IAD (20 percent).

## Trip Purpose (Table 5)

- The percentage of locally originating air passengers reporting that they were traveling for non-business-related reasons increased from 62 percent in 2017 to 65 percent in 2019.
- While non-business trips such as vacation declined from 28 percent to 24 percent, business-related trips decreased from 38 percent in 2017 to 35 percent in 2019.

## Trip Origin (Table 6)

- Between 2017 and 2019, the percentage of air passengers beginning their trips from a private residence decreased from 60 percent to 58 percent of total trip originations.
- The percentage of air passengers beginning their trip to the airport from a hotel or motel saw a two percent increase between 2017 and 2019 - from 28 percent to 30 percent.
- Short-term rental (i.e.: Airbnb, VRBO) was added as an option in 2019, and it accounted for 2 percent of the overall share.

## Mode of Access (Tables 7 - 15)

- The region's most common mode of access to the airports continued to be the automobile (private, rental, taxicab, and transportation network companies (TNCs) such as Uber/Lyft), accounting for 84 percent of all local originations. While the automobile also made up 84 percent of 2017 mode share, the distribution of the types of automobile modes therein differed significantly - with TNCs experiencing the largest shift from 14 percent to 24 percent of overall mode share.
- Of the 84 percent of trips accessed by automobile, the following numbers provide the 2019 percent breakdown for each automobile trip type in the region, followed by the 2017 percentage breakdown in parentheses: private car - 41 percent (down from 47 percent), rental car - 10 percent (down from 12 percent), taxicab - nine percent (down from 11 percent), and TNC - 24 percent (up from 14 percent).
- Passengers between 19 and 34 years of age are twice as likely to travel by TNC as someone over 65, while those over 65 are three times as likely to use as a taxi. Private car use is distributed evenly across age groups.

- Automobile access to BWI decreased from 89 percent to 86 percent. The following numbers provide the 2019 percent breakdown for each automobile trip type to BWI, followed by the 2017 percentage breakdown in parentheses: private car – 57 percent (down from 63 percent), rental car – 13 percent (down from 14 percent), taxicab – three percent (down from four percent), and TNC – 13 percent (up from eight percent).
- Metrorail usage by passengers traveling to DCA decreased to 12 percent (from 13 percent in 2017). Overall access by automobile to DCA increased to 79 percent (from 77 percent in 2017), with the following auto mode shares making up this total: private car – 23 percent (down from 29 percent), rental car – eight percent (down from nine percent), taxicab – 12 percent (down from 18 percent), and TNC – 36 percent (up from 21 percent).
- Automobile access to IAD remained the same in 2019 at 89 percent, with the following auto mode shares making up this total: private car – 45 percent (down from 52 percent), rental car – 10 percent (down from 13 percent), taxicab – 12 percent (up from 11 percent), and TNC – 22 percent (up from 13 percent).

## Air Traveler Characteristics (Tables 16 - 19)

- In 2019, area residents accounted for 41 percent of the total departing air passengers. Non-residents accounted for the remaining 61 percent of departing air passengers.
- The share of local originating passengers over the age of 65 grew from 14 to 16 percent, while passengers age 50 to 64 decreased from 30 to 28 percent. Passengers age 19 to 24 and 18 or younger remained the same at seven percent and two percent, respectively.
- Household incomes for air travelers in the Washington-Baltimore region continue to be higher than the regional median. Only 35 percent of the region’s passengers had household incomes less than \$100,000 and 26 percent had household incomes over \$200,000.

## Air Traveler Spending (Tables 20 - 25)

- Two new questions related to air traveler spending were added to the 2019 survey: Mode of Access Spending (Question B8) and Airport Concessions Spending (Question D7)
- Survey participants were given the option of seven ground access travel cost fields ranging from \$0 to over \$100. Of those ranges, TNCs were the dominant mode for the \$10-\$99 ranges. Of the 35 percent of air passengers who spent \$0 on their mode of access, 77 percent traveled by private car. Approximately 40 percent of non-work trips spent nothing on travel, versus 25 percent of work-related trips. Overall, work-related trips also tended to spend more on travel than those traveling on non-work trips.
- Most air passengers reported spending between \$1-\$24 on airport concessions – 84 percent of originating air passengers and 63 percent of local originating air passengers – while 23 percent of overall air passengers do not spend money at the airport. The highest household income bracket spent most in each range while the lowest income bracket spent least in each range. A greater proportion of local originating passengers spent larger sums (\$25-\$100+).

# I. INTRODUCTION

This report summarizes the findings from the 2019 Washington-Baltimore Regional Air Passenger Survey (APS) conducted concurrently at Baltimore/Washington International Thurgood Marshall Airport (BWI), Ronald Reagan Washington National Airport (DCA) and Washington Dulles International Airport (IAD). The Metropolitan Washington Council of Governments (COG) conducted this survey as part of its Continuous Airport System Planning (CASP) program. One of the goals of the CASP program is to continue the rational development of aviation facilities and services at the three major commercial airports serving the Washington-Baltimore region, shown in Figures 1 and 2.

The 2019 regional air passenger survey was the fourteenth in a series of regional air passenger surveys conducted since 1981. Prior surveys were conducted in 1981/82, 1987, 1992, 1998, 2000, 2002, and every two years since 2005. Data from the air passenger surveys 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 improvement planning continues. The data produced by these air passenger surveys will be invaluable in further planning for these improvements. The survey data will also be useful in the following areas:

- **Market analyses regarding passenger air travel and ground access behavior, geographic information, and demographic data for developing airport, airline and support services**
- **Planning for airport ground access, including 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**
- **Air passenger demand and allocation forecasting for future updates to the Washington-Baltimore Regional Airport System Plan**

The 2019 air passenger survey took place during the two-week period from Wednesday, October 16<sup>th</sup> to Tuesday, October 29<sup>th</sup>. Flights requiring resurveying occurred between October 30<sup>th</sup> and November 12<sup>th</sup>. Approximately 23,858 out of a total of 90,964 enplaning passengers on 673 randomly selected flights (589 domestic and 84 international) completed surveys as they waited to board their planes, an overall response rate of 28.4 percent. All 23,858 completed survey questionnaires have been processed and tabulated.<sup>1</sup>

The survey sample included flights from 32 airlines, of which 23 were international and 9 were domestic carriers. The sample flights were grouped into 367 destination clusters. The survey instrument contained questions regarding the respondent's airline trip, the trip to the airport, the choice of airport, spending behavior, and several demographic questions, such as household size, household income, and respondent age. Appendix B contains the 2019 survey questionnaire. There

<sup>1</sup> Families or groups traveling together may complete one questionnaire for their group, although it is preferable to have each individual over the age of 16 complete their own questionnaire.

is slight variation among the questionnaires administered at each of the airports due to facility-specific considerations at each airport.

**Table 1: Data Collection Summary**

<b>Airport</b>	<b>Flight Surveyed</b>	<b>Revenue Passengers</b>	<b>Completed Surveys</b>	<b>Response Rate</b>
<b>BWI</b>	236	32,942	9,574	29.1%
<b>DCA</b>	231	23,497	6,773	28.8%
<b>IAD</b>	190	26,985	7,511	27.8%
<b>TOTAL</b>	<b>657</b>	<b>83,424</b>	<b>23,858</b>	<b>28.6%</b>

Source: Washington-Baltimore Regional Air Passenger Survey 2019

The following additions were made to the survey instrument in 2019:

- Question B1 – New Origin Option: Short-term Rental (Airbnb, VRBO)
- Question B6 – New Mode Options: Biking and Walking
- Question B8 – Mode of Access Spending
- Question B9 – Carpooling
- Question C2 – Airport Preference Ranking
- Question D7 Airport Concession Spending

Figure 2: Washington-Baltimore Air System Planning Region



Source: Washington-Baltimore Regional Air Passenger Survey 2019

## II. FINDINGS - TRANSPORTATION

Survey results are summarized by airport and the overall Washington-Baltimore air systems planning region. 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 included. These summaries generally reflect trips where passengers arrive at the airport by ground transportation. Passengers arriving to the surveyed flight by a connecting flight (in contrast to ground access transportation) are only included in discussions of total enplanements in the airport use section of this report, where enplanements are defined as the number of passengers boarding.

Although the data for the 2019 survey were 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 2019. 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 2019 survey results are compared with results from the 2015 and the 2017 surveys.

### Airport Enplanement Share (Survey Question A-1)<sup>2</sup>

In 2019, 37.8 million passengers traveled through the Washington-Baltimore Region, an increase of four percent from 2017 (36.5 million). Of those 37.8 million passengers, 30 million passengers originated locally from the Washington-Baltimore Region, an increase of 13 percent (from 26.7 million) from 2017, while 7.8 million passengers made a connection through the region – a decrease of 21 percent (from 9.8 million).

The regional total of enplanements, broken out by the percentage of passengers at each airport, are: 36 percent of passengers at BWI (no change from 2017), 32 percent of passengers at DCA (down from 33 percent in 2017), and 33 percent of passengers at IAD (up from 31 percent in 2017).

Between 2017 and 2019, the number and percent share of originating air passengers increased at all three airports, though DCA did experience a slight decline in total enplanements. The overall share of local originations increased from 73 percent to 80 percent in 2019. From a regional perspective, BWI and IAD accounted for near equal shares of the increase in local originating passengers – 44 and 43 percent, respectively. Broken out by airport, the following shifts took place: BWI increased from 67 to 77 percent, DCA increases from 88 to 91 percent, and IAD increased from 64 to 71 percent. To review all shifts in these percentages, regionally and by airport, from 2015 through 2019, see Table 2.

Figures 3, 4, and 5 illustrate the airport share of local originating passengers, connecting passengers, and total enplaning passengers from the surveys conducted in 2015, 2017, and 2019. In 2019 the greatest share of the region's local originating passengers departed from DCA, (36 percent) - BWI and IAD accounted for 35 percent and 29 percent, respectively (see Figure 4). IAD had the greatest share of the region's connecting passengers at 46 percent – a significant increase from 41% in 2017, while DCA had the least at 13 percent. BWI's share of connecting passengers

<sup>2</sup> Where applicable, references are given to the survey question for which data are compiled for the analysis.

decreased from 44 to 40 percent in 2019 (see Figure 5). BWI has the greatest share of the region's total enplaning passengers (36 percent), while DCA and IAD follow close behind with 32 and 33 percent, respectively (see Figure 6). Note: in Table 2 and all subsequent tables, percentages represent a percent of the total at the bottom of the table in each respective column.

**Table 2: Annual Air Passenger Trip Originations (000s)**

Enplanement Type		BWI			DCA			IAD			REGION		
		2015	2017	2019	2015	2017	2019	2015	2017	2019	2015	2017	2019
Local originations	Number	8,485	8,910	10,426	10,367	10,499	10,918	6,592	7,245	8,726	25,444	26,654	30,070
	Percent	71%	67%	77%	90%	88%	91%	62%	64%	71%	75%	73%	80%
Connecting	Number	3,449	4,305	3,116	1,127	1,458	1,031	4,120	4,062	3,603	8,696	9,825	7,750
	Percent	29%	33%	23%	10%	12%	9%	38%	36%	29%	25%	27%	20%
<b>Total Enplanement</b>		<b>11,934</b>	<b>13,215</b>	<b>13,542</b>	<b>11,494</b>	<b>11,957</b>	<b>11,949</b>	<b>10,712</b>	<b>11,307</b>	<b>12,329</b>	<b>34,140</b>	<b>36,479</b>	<b>37,820</b>
<b>Percent of Region</b>		<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

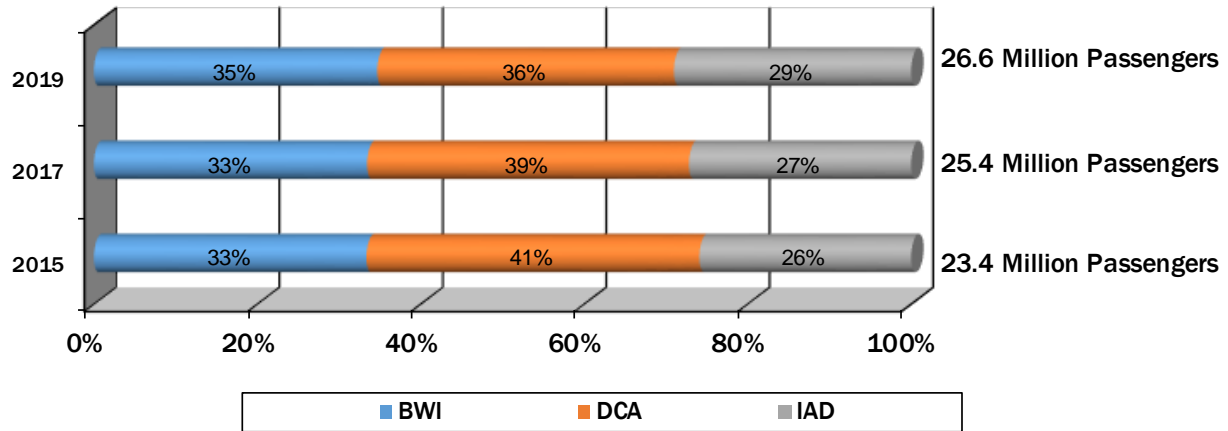
Notes:

\* Totals may not add due to rounding

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

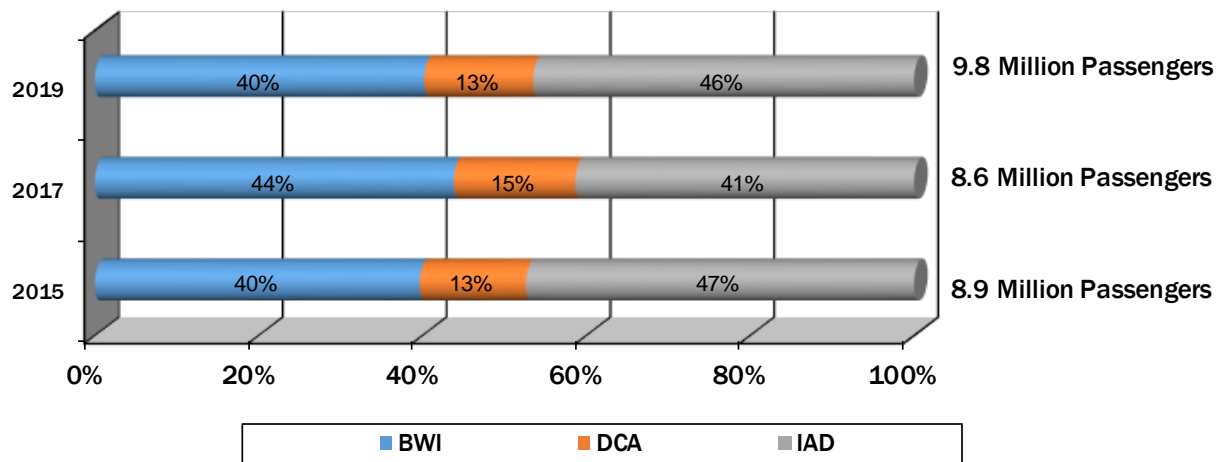
Source: Washington-Baltimore Regional Air Passenger Survey 2019

**Figure 3: Airport Share of Annual Local Originating Passengers**



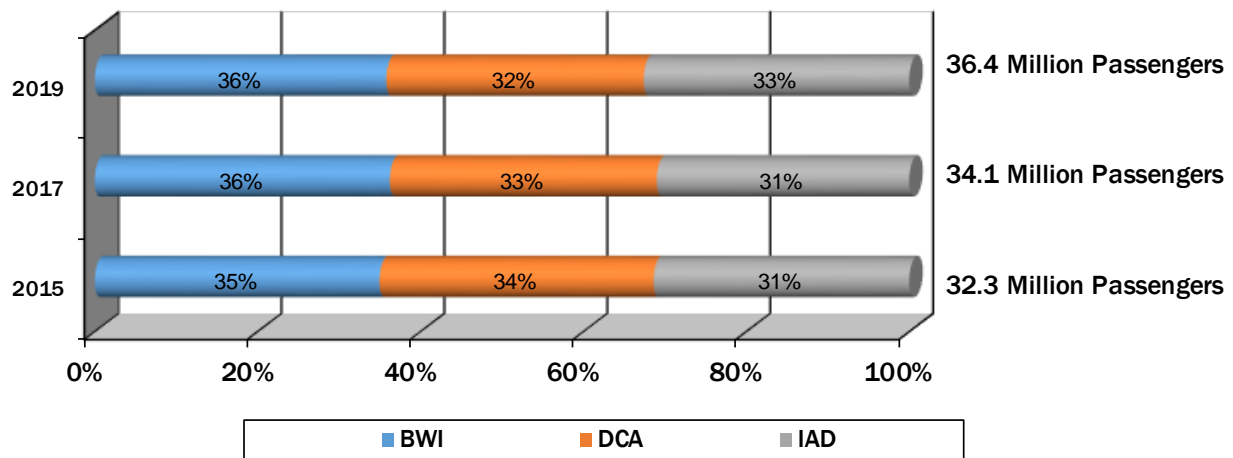
Source: Washington-Baltimore Regional Air Passenger Survey 2019

**Figure 4: Airport Share of Annual Connecting Passengers**



Source: Washington-Baltimore Regional Air Passenger Survey 2019

**Figure 5: Airport Share of Total Annual Passengers**



Source: Washington-Baltimore Regional Air Passenger Survey 2019

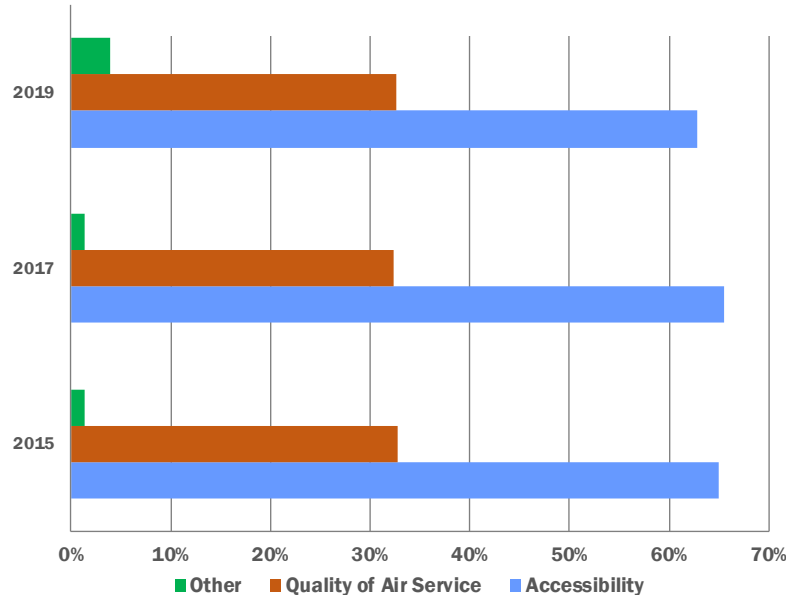


## Airport Choice (Survey Question C-1)

Survey respondents ranked the three most important reasons (out of a list of 10) for choosing their departing airport. Table 3 summarizes the airport choice responses, which are categorized either as accessibility (closest airport, better public transportation, better road access and parking facilities) or quality of air service (convenient flight times, less expensive airfares, nonstop or direct flights, frequent flier restrictions).

When compared with 2017, the percentage of locally originating passengers citing accessibility conditions as the most important factor decreased by two percent (65 to 63 percent), while air service increased by one percentage point (32 to 33 percent) and “Other” increased from one to four percent.

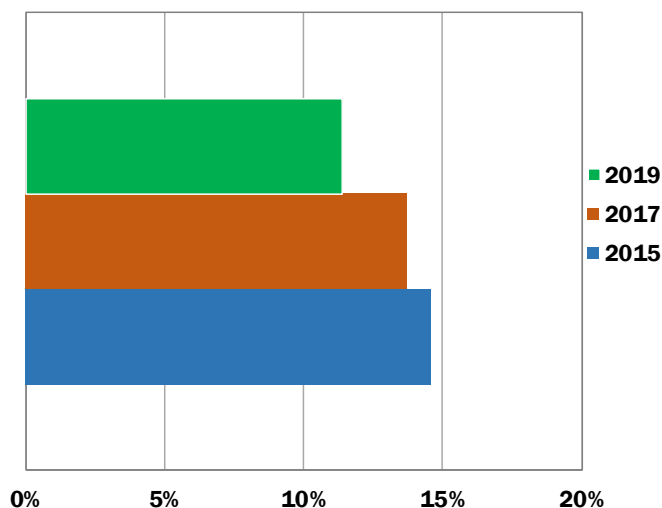
**Figure 6: Local Originating Air Passenger Airport Choice**



Source: Washington-Baltimore Regional Air Passenger Survey 2019

Closest airport decreased by two percent, from 60 to 58 percent, while public transportation increased from two to three percent and road access decreased from three percent to two percent; a trend reversal from 2017. Passengers citing less expensive airfare as a primary factor dropped from 14 to 11 percent, primarily due to a major shift at IAD from 16 to 8 percent. More convenient flight times and only airport serving market each increased by one percent.

**Figure 7: Lower Airfares as Primary Factor in Airport Choice**



Source: Washington-Baltimore Regional Air Passenger Survey 2019

Closest airport and lowest airfare, 58 percent and 11 percent respectively, are the top two reasons reported for influencing airport choice, with more convenient flight times trailing close behind at 10 percent. For those citing closest airport, this number increased at BWI (59 to 61 percent), while decreasing at DCA (70 to 69 percent) and IAD (47 to 44 percent). For those citing lowest airfare, BWI remained unchanged at 19 percent, while decreasing at DCA (eight to seven percent) and IAD (16 to eight percent). More convenient flight times remained unchanged at BWI and DCA – seven and eight percent, respectively – and increased from 15 to 17 percent at IAD.

**Table 3: Primary Reasons for Airport Choice (000s)**

Primary reason for choosing airport used	BWI			DCA			IAD			REGION		
	2015	2017	2019	2015	2017	2019	2015	2017	2019	2015	2017	2019
<b><u>Accessibility</u></b>												
Closest airport	60%	59%	61%	65%	70%	69%	47%	47%	44%	60%	60%	58%
Better public transportation	1%	1%	1%	6%	4%	4%	1%	0%	2%	3%	2%	3%
Better access roads & parking	5%	5%	2%	2%	1%	1%	3%	3%	3%	2%	3%	2%
<b>SUBTOTAL - Accessibility</b>	<b>65%</b>	<b>65%</b>	<b>64%</b>	<b>73%</b>	<b>76%</b>	<b>74%</b>	<b>50%</b>	<b>51%</b>	<b>49%</b>	<b>65%</b>	<b>65%</b>	<b>63%</b>
<b><u>Quality of Air Service</u></b>												
More convenient flight times	6%	7%	7%	7%	8%	8%	14%	15%	17%	9%	9%	10%
Only airport with non-stop flight	4%	4%	3%	4%	4%	4%	11%	11%	11%	6%	6%	6%
Less expensive airfare	19%	19%	19%	11%	8%	7%	15%	16%	8%	15%	14%	11%
Frequent flyer airline benefits	2%	2%	1%	2%	2%	2%	3%	2%	2%	2%	2%	2%
Only airport serving market	1%	1%	2%	1%	1%	2%	4%	4%	7%	2%	2%	3%
<b>SUBTOTAL - Air Service</b>	<b>33%</b>	<b>34%</b>	<b>32%</b>	<b>25%</b>	<b>23%</b>	<b>22%</b>	<b>47%</b>	<b>47%</b>	<b>45%</b>	<b>33%</b>	<b>32%</b>	<b>33%</b>
OTHER	2%	1%	3%	3%	2%	4%	2%	2%	5%	1%	1%	4%
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>101%</b>	<b>100%</b>	<b>100%</b>	<b>99%</b>	<b>100%</b>	<b>99%</b>	<b>99%</b>	<b>99%</b>	<b>99%</b>

Notes:

\* Totals may not add due to rounding

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

Source: Washington-Baltimore Regional Air Passenger Survey 2019

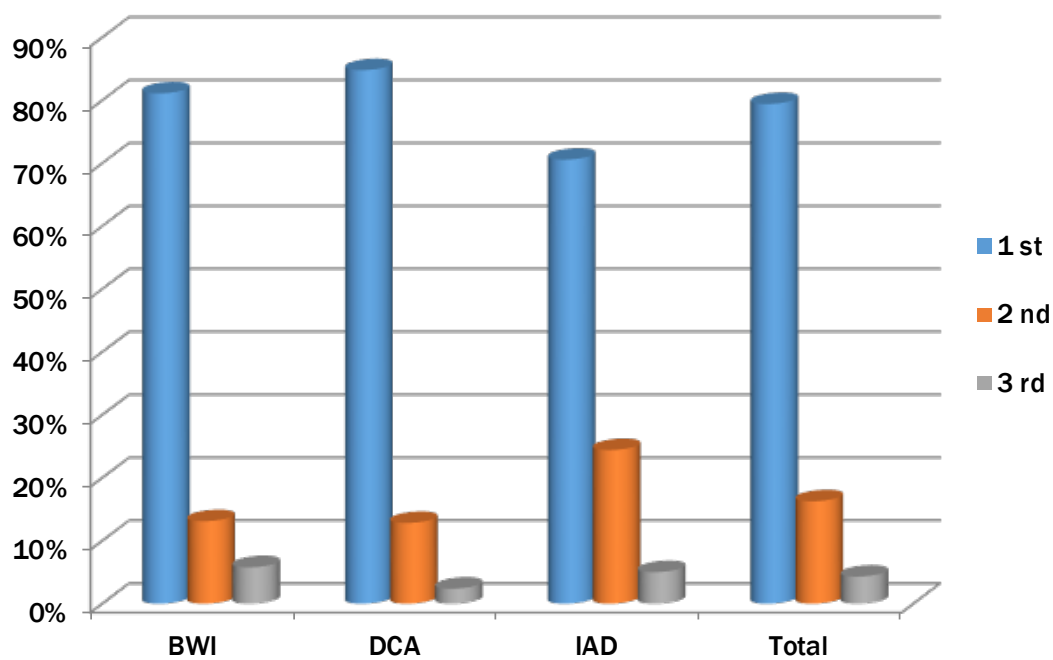
## Airport Preference (Survey Question C-2)

Passengers also cite their preferred airport, as travel restrictions and service availability sometimes prevent passengers from using their top choice. There was a change made on this question in 2019. Whereas previous surveys asked participants to indicate their preferred airport, in 2019 participants were asked to rank all three of the region's airports in order of preference. As such, Figure 8 shows the results of this ranking. Figure 9 shows the percentage breakdown for airport preference by locally originating passengers (no preference, at preferred airport, not at preferred airport). Table 4 shows this breakdown by the airport that surveyed passengers departed from, paired with their stated airport preference, broken down by resident status.

As Figure 9 illustrates, between 2017 and 2019 the percentage of passengers departing from their preferred airport increased significantly from 67 to 79 percent, though the significant increase is likely due in part to the new question phrasing. Those traveling with no preference declined from 17 to four percent, though again, this significant shift is due in part to the changes made to the survey. The 2019 survey did not permit participants to indicate “no preference,” so the four percent of those listing no preference were those who ranked all three airports equally (i.e.: “1,1,1”) while those reporting not traveling at their preferred airport remained the same at 16 percent. Figure 9 illustrates these percentages for the four most recent survey years.

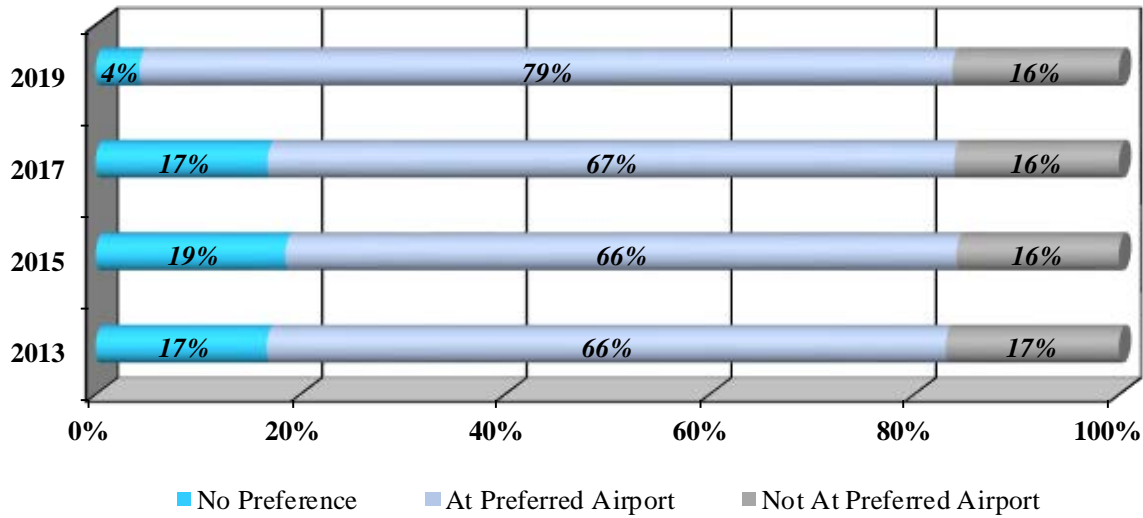
In 2019, 45 percent of local originating air passengers preferred to use DCA, 34 percent preferred BWI, and 22 percent preferred IAD (see Table 4). While BWI did not experience a change in preference share, preference for traveling from DCA showed a three percent decrease, while IAD experienced a four percent increase.

**Figure 8: Airport Preference Ranking (1-3)**



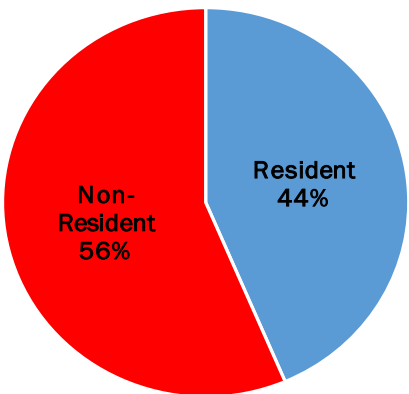
Source: Washington-Baltimore Regional Air Passenger Survey 2019

**Figure 9: Travel from Preferred Airport (Locally Originating Passengers)**



Source: Washington-Baltimore Regional Air Passenger Survey 2019

**Figure 10: 2019 Regional Local Originating Air Passenger Resident Status**



The difference in airport preference between residents and non-residents is summarized in Table 4. In 2019, local originating passengers visiting the region (non-residents) accounted for 56 percent of local originating passengers. Of these visitors, 50 percent selected DCA as their preferred airport, while 37 percent of resident air passengers prefer DCA. Preference rates for non-residents were 29 percent and 20 percent for BWI and IAD, respectively, compared to 39 percent and 24 percent for residents.

Source: Washington-Baltimore Regional Air Passenger Survey 2019

**Table 4: Preferred Airport by Resident Status (000s)**

Preferred Airport		Resident			Non-Resident			Total		
		2015	2017	2019	2015	2017	2019	2015	2017	2019
BWI	Number	2,285	2,631	2,951	3,163	3,038	2,863	5,448	5,669	5,814
	Percent	36%	35%	39%	33%	32%	29%	34%	34%	34%
DCA	Number	2,592	3,298	2,808	4,942	4,834	4,903	7,534	8,132	7,711
	Percent	41%	44%	37%	51%	52%	50%	47%	48%	45%
IAD	Number	1,433	1,515	1,784	1,596	1,485	1,991	3,029	3,000	3,775
	Percent	23%	20%	24%	16%	16%	20%	19%	18%	22%
TOTAL	Number	6,310	7,444	7,543	9,701	9,357	9,757	16,011	16,801	17,300
	Percent	100%	100%	100%	100%	100%	100%	100%	100%	100%

\* Totals do not include non-respondents, resident unknown and no preference

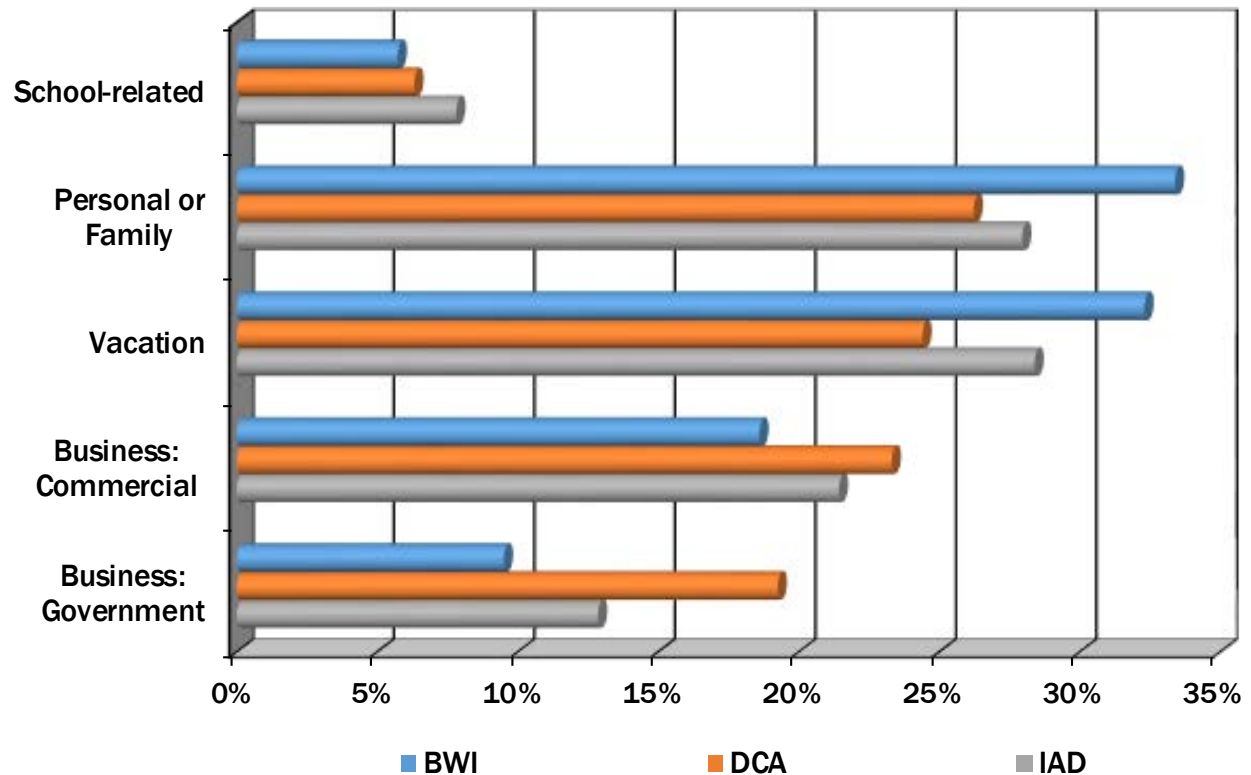
Source: Washington-Baltimore Regional Air Passenger Survey 2019

## Trip Purpose (Survey Question A-3)

As shown in Table 5, in 2019 the percentage of locally originating air passengers reporting traveling for business reasons decreased from 38 to 35 percent, while the share of non-business-related travel increased from 62 to 65 percent. Commercial business and business related to the federal government decreased from 23 to 21 and 13 to 12 percent, respectively, while local government business remained at two percent. Vacation travelers increased to 28 percent (from 24 percent, 2017) and school-related travel increased slightly from six to seven percent. Personal or family-related travel decreased slightly from 30 to 29 percent.

Figure 11 shows air travel by trip purpose at each of the three airports in 2019. This figure shows that BWI has the greatest share of personal and vacation air travel, DCA has the greatest share of business travel, and IAD has the greatest share of school-related travel.

**Figure 11: Annual Originating Air Passengers by Trip Purpose (Percent by Airport)**



Source: Washington-Baltimore Regional Air Passenger Survey 2019

**Table 5: Trip Purpose (000s)**

Trip Purpose	BWI			DCA			IAD			REGION			
	2015	2017	2019	2015	2017	2019	2015	2017	2019	2015	2017	2019	
<b><i>Business Related</i></b>													
Business related to federal government (including military)	Number	736	775	699	1,661	1,779	1,480	761	901	858	3,158	3,455	3,037
	Percent	9%	9%	8%	16%	17%	17%	12%	13%	11%	13%	13%	12%
Business related to state and local gov.	Number	144	145	146	212	220	209	89	100	161	445	465	516
	Percent	2%	2%	2%	2%	2%	2%	1%	1%	2%	2%	2%	2%
Commercial Business	Number	1,938	1,906	1,654	2,305	2,574	2,045	1,339	1,600	1,699	5,582	6,080	5,398
	Percent	23%	22%	19%	22%	25%	23%	21%	23%	21%	22%	23%	21%
<b>SUBTOTAL – Business</b>	Number	2,818	2,826	2,499	4,178	4,573	3,734	2,189	2,601	2,718	9,185	10,000	8,951
	Percent	33%	32%	28%	41%	44%	43%	34%	37%	34%	37%	38%	35%
<b><i>Non-Business Related</i></b>													
Vacation	Number	2,482	2,147	2,873	2,376	2,180	2,141	2,096	1,952	2,251	6,954	6,279	7,265
	Percent	29%	25%	32%	23%	21%	24%	33%	28%	28%	28%	24%	28%
Personal or family affairs	Number	2,560	2,975	2,970	2,794	2,841	2,301	1,622	1,892	2,216	6,976	7,708	7,487
	Percent	30%	34%	33%	27%	27%	26%	25%	27%	28%	28%	30%	29%
Student or school-related	Number	417	549	509	675	560	554	363	423	619	1,455	1,532	1,682
	Percent	5%	6%	6%	7%	5%	6%	6%	6%	8%	6%	6%	7%
Other	Number	155	239	46	242	184	47	137	143	127	534	566	220
	Percent	2%	3%	1%	2%	2%	1%	2%	2%	2%	2%	2%	1%
<b>SUBTOTAL – Non-Business</b>	Number	5,614	5,910	6,398	6,087	5,765	5,043	4,218	4,410	5,213	15,919	16,085	16,654
	Percent	67%	68%	72%	59%	56%	57%	66%	63%	66%	63%	62%	65%
<b>TOTAL</b>	Number	8,432	8,736	8,897	10,265	10,338	8,777	6,407	7,011	7,931	25,104	26,085	25,605
	Percent	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%
Non-Respondents		52	174	1,529	102	162	2,141	185	234	796	339	570	4,466
<b>Total Originations</b>		<b>8,484</b>	<b>8,910</b>	<b>10,426</b>	<b>10,367</b>	<b>10,500</b>	<b>10,918</b>	<b>6,592</b>	<b>7,245</b>	<b>8,727</b>	<b>25,443</b>	<b>26,655</b>	<b>30,071</b>

Notes:

\* Totals may not add due to rounding

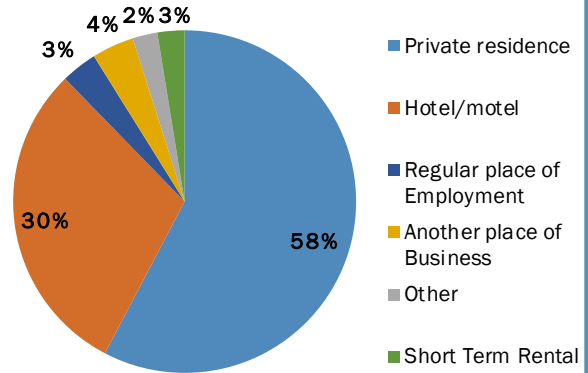
Source: Washington-Baltimore Regional Air Passenger Survey 2019

## Trip Origin (Survey Question B-1)

In 2019, 58 percent of air passengers began their trips at a private residence – a two percent decrease from 2017. Hotel/motel originations increased by two percent as well – from 28 to 30 percent, while regular workplace and other workplace trips decreased from four to three percent and six to four percent, respectively. “Other” remained at two percent, and a new addition, short-term rental (i.e.: Airbnb, VRBO) made up three percent of all origins. See Figure 12 for a graphic depiction of local air passenger trip origins.

At BWI and DCA, private residence origin decreased by five and four percent, respectively, while it remained the same at IAD. Hotel/motel origins increased by four percent at BWI and by two percent at both DCA and IAD. Regular workplace origin remained the same at BWI and decreased by one percent at both DCA and IAD. Other workplace decreased by one percent at BWI and DCA and by three percent at IAD. All airports reported two percent origins of the newly added short-term rental, as well as “other.” See Table 6 below for more details.

**Figure 12: Local Air Passenger Trip Origins (Region)**



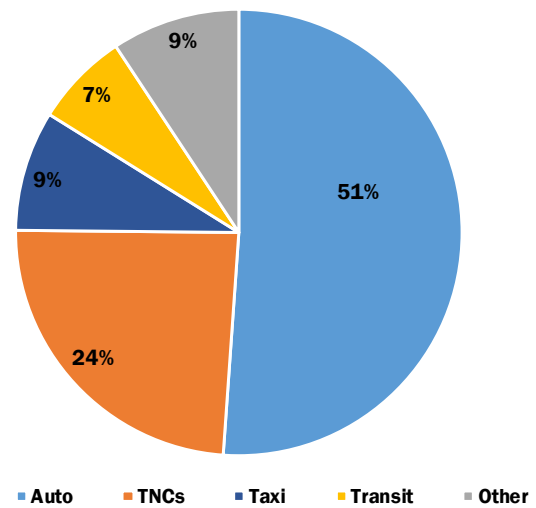
Note:- Non-respondents are not included

Source: Washington-Baltimore Regional Air Passenger Survey 2019

## Mode of Access (Survey Question B-6)

In 2019, the region’s most common mode of access to the airports continued to be the automobile (private, rental, taxicab, and transportation network companies [TNCs] such as Uber/Lyft), accounting for 84 percent of all local originations. While the automobile also made up 84 percent of the mode share in 2017, the distribution of the types of automobile modes therein differed significantly – with TNCs experiencing the largest shift from 14 percent to 24 percent of overall mode share in 2019. The mode share of TNCs increased at all airports while private car and rental car share decreased at all airports. Taxi share decreased at all airports except IAD, which increased by one percent from 11 to 12 percent. Two new modal options were added to Question B-6 in 2019: walking and biking. These modes are included in the “Other” category featured in Figure 13. Two percent of air passengers walked to BWI while one percent of passengers walked to DCA and IAD.

**Figure 13: Local Air Passenger Mode of Access (Region)**



\* Walk and Bike mode of access are included in other

Source: Washington-Baltimore Regional Air Passenger Survey 2019

## **By Region**

Of the 84 percent of trips accessed by automobile, the following numbers provide the 2019 percent breakdown for each automobile trip type in the region, followed by the 2017 percentage breakdown in parentheses: private car – 41 percent (down from 47 percent), rental car – 10 percent (down from 12 percent), taxicab – nine percent (down from 11 percent), and TNC – 24 percent (up from 14 percent).

### **At BWI**

At BWI, automobile access decreased from 89 percent to 86 percent. The following numbers provide the 2019 percent breakdown for each automobile trip type to BWI, followed by the 2017 percentage breakdown in parentheses: private car – 57 percent (down from 63 percent), rental car – 13 percent (down from 14 percent), taxicab – three percent (down from four percent), and TNC – 13 percent (up from eight percent).

### **At DCA**

Metrorail usage by passengers traveling to DCA decreased to 12 percent (from 13 percent in 2017). Overall access by automobile to DCA increased to 79 percent (from 77 percent in 2017), with the following auto mode shares making up this total: private car – 23 percent (down from 29 percent), rental car – eight percent (down from nine percent), taxicab – 12 percent (down from 18 percent), and TNC – 36 percent (up from 21 percent).

### **At IAD**

Automobile access to IAD remained the same in 2019 at 89 percent, with the following auto mode shares making up this total: private car – 45 percent (down from 52 percent), rental car – 10 percent (down from 13 percent), taxicab – 12 percent (up from 11 percent), and TNC – 22 percent (up from 13 percent).

## **Resident Status (Table 9)**

Table 9 provides a regional comparison of resident versus non-resident departing air passengers by mode of access. Regionally, TNCs comprised 22 percent of the mode share for residents in 2019. While a greater majority of area residents accessed the airports by private auto (57 percent), this is an eight percent share decrease from 2017, while TNCs increased by a six percent share and a 38 percent absolute increase. At all airports, the share of residents using private auto, taxis and rental cars to access the airport declined or remained the same between 2017 and 2019, which could be attributed, at least in part, to the increase in TNC ridership by residents.

In 2019, TNCs comprised 18 percent of the mode share for non-residents. While 29 percent of area residents accessed the airports by private auto, this is a seven percent share decrease from 2017, while TNCs increased by a seven percent share and a 64 percent absolute increase. At all airports, the share of non-residents using private auto and rental cars declined or remained the same between 2017 and 2019. Taxi share decreased at BWI and DCA, while it increased by a two percent share from seven to nine percent at IAD. As with the mode share of resident air passengers, these trends could be attributed, at least in part, to the increase in TNC ridership by non-residents.



### Trip Purpose (Table 10)

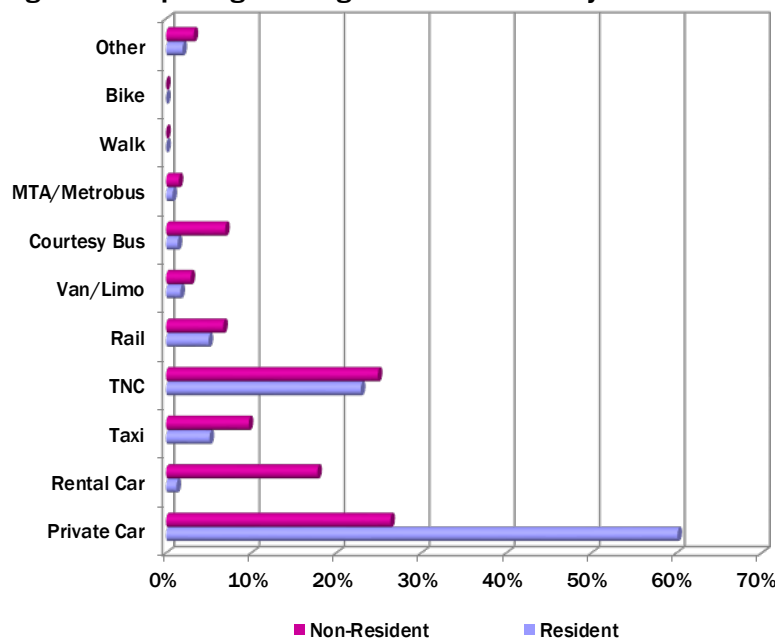
Whereas 28 percent of those traveling for work travel to the airport by private car, 31 percent of work travelers travel by TNC. – a nine percent difference in absolute value. Among those who used TNCs to travel to the airport, more than 60 percent were work trips.

### Parking, Drop-off, Carpooling (Tables 8, 13-15)

Respondents' use of parking facilities at the airport show that 77 percent of air passengers do not park at the airport. At BWI, six percent use the Daily garage and five percent use the Long-Term A or B parking garage. At DCA, one percent of passengers use the Short-term Hour and the Long-term Economy parking, each, while two percent use Long-term/Daily. At IAD, it is a three-way split where three percent of passengers each use Short-term Hour, Long-term/Daily, and Long-term/Econ. Including non-respondents which accounted for 31 percent of individuals, 52 percent of passengers are dropped-off at the airport.

The 2019 survey questionnaire included a new question (B9): "If you arrived in a private or rented car, taxi, or ride-hailing vehicle, did you carpool with someone else?" Overall, including non-respondents which accounted for 29 percent of individuals, 24 percent of passengers indicated that they did carpool to the airport.

**Figure 14: Departing Passenger Mode of Access by Resident Status**



Source: Washington-Baltimore Regional Air Passenger Survey 2019

**Table 6: Ground Trip Origin by Airport (000s)**

Ground Trip Origin		BWI			DCA			IAD			REGION		
		2015	2017	2019	2015	2017	2019	2015	2017	2019	2015	2017	2019
Private residence	Number	5,380	5,985	6,004	4,440	4,940	4,302	3,800	4,385	5,030	13,620	15,310	15,336
	Percent	65%	70%	65%	44%	49%	45%	61%	64%	64%	56%	60%	58%
Hotel/motel	Number	2,071	1,652	2,093	4,090	3,755	3,735	1,884	1,716	2,154	8,045	7,123	7,982
	Percent	25%	19%	23%	41%	37%	39%	30%	25%	27%	33%	28%	30%
Workplace: regular	Number	258	332	334	465	488	347	195	256	223	918	1,076	904
	Percent	3%	4%	4%	5%	5%	4%	3%	4%	3%	4%	4%	3%
Workplace: other	Number	340	404	330	727	747	570	268	332	155	1,335	1,483	1,055
	Percent	4%	5%	4%	7%	7%	6%	4%	5%	2%	5%	6%	4%
Other	Number	193	228	218	269	252	233	110	126	174	572	606	625
	Percent	2%	3%	2%	3%	2%	2%	2%	2%	2%	2%	2%	2%
Short-Term Rental (Air BNB, VRBO)	Number			222			295			161			678
	Percent			2%			2%			2%			2%
<b>TOTAL</b>	Number	<b>8,242</b>	<b>8,601</b>	<b>9,201</b>	<b>9,991</b>	<b>10,182</b>	<b>9,482</b>	<b>6,257</b>	<b>6,815</b>	<b>7,897</b>	<b>24,490</b>	<b>25,598</b>	<b>26,580</b>
	Percent	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>99%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Non-Respondents		242	309	1,224	376	316	1,436	339	430	829	957	1,055	3,489
<b>Total Originations</b>		<b>8,484</b>	<b>8,910</b>	<b>10,425</b>	<b>10,367</b>	<b>10,498</b>	<b>10,918</b>	<b>6,596</b>	<b>7,245</b>	<b>8,726</b>	<b>25,447</b>	<b>26,653</b>	<b>30,069</b>

Notes:

\* Totals may not add due to rounding

Source: Washington-Baltimore Regional Air Passenger Survey 2019

**Table 7: Mode of Access by Airport (000s)**

Mode of Access	BWI			DCA			IAD			REGION			
	2015	2017	2019	2015	2017	2019	2015	2017	2019	2015	2017	2019	
Private car	Number	4,864	5,299	5,670	2,866	2,889	2,418	3,006	3,420	3,607	10,736	11,608	11,694
	Percent	59%	63%	57%	28%	29%	23%	48%	52%	45%	44%	47%	41%
Rental car	Number	1,424	1,193	1,253	1,015	853	845	980	837	785	3,419	2,883	2,883
	Percent	17%	14%	13%	10%	9%	8%	16%	13%	10%	14%	12%	10%
Taxi	Number	476	303	288	2,481	1,783	1,217	788	759	980	3,745	2,845	2,484
	Percent	6%	4%	3%	25%	18%	12%	13%	11%	12%	15%	11%	9%
TNCs	Number	404	633	1,273	1,394	2,057	3,802	439	871	1,780	2,237	3,561	6,855
	Percent	5%	8%	13%	14%	21%	36%	7%	13%	22%	9%	14%	24%
Metrorail (DCA)	Number	0	0	0	1,173	1,263	1,264	39	35	8	1,212	1,298	1,272
	Percent	0%	0%	0%	12%	13%	12%	1%	1%	0%	5%	5%	4%
Rail service	Number	165	217	265	11	62	16	8	25	1	184	304	283
	Percent	2%	3%	3%	0%	1%	0%	0%	0%	0%	1%	1%	1%
Light Rail (BWI)	Number	44	53	34	0	0	0	0	0	0	44	53	34
	Percent	1%	1%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Airport Shuttle /Limo	Number	311	188	245	325	172	191	399	143	193	1,035	503	628
	Percent	4%	2%	2%	3%	2%	2%	6%	2%	2%	4%	2%	2%
Hotel shuttle bus	Number	461	269	466	600	467	495	349	247	345	1,410	983	1,307
	Percent	6%	3%	5%	6%	5%	5%	6%	4%	4%	6%	4%	5%
Metrobus/MTA Bus	Number	79	94	58	73	16	62	141	113	241	293	223	361
	Percent	1%	1%	1%	1%	0%	1%	2%	2%	3%	1%	1%	1%
Walked	Number			8			4			6	0	0	18
	Percent			2%			1%			1%	0%	0%	1%
Biked	Number			0			3			0	0	0	3
	Percent			0%			0%			0%	0%	0%	0%
Other	Number	71	151	324	130	243	224	151	155	145	352	549	694
	Percent	1%	2%	3%	1%	2%	2%	2%	2%	2%	1%	2%	2%
<b>TOTAL</b>	Number	<b>8,299</b>	<b>8,400</b>	<b>9,885</b>	<b>10,068</b>	<b>9,805</b>	<b>10,542</b>	<b>6,300</b>	<b>6,605</b>	<b>8,091</b>	<b>24,667</b>	<b>24,810</b>	<b>28,517</b>
	Percent	<b>100%</b>	<b>100%</b>	<b>101%</b>	<b>100%</b>	<b>100%</b>	<b>101%</b>	<b>100%</b>	<b>100%</b>	<b>101%</b>	<b>100%</b>	<b>100%</b>	<b>101%</b>
Non-Respondents		185	511	541	299	693	377	291	640	635	775	1,844	1,553
<b>Total Originations</b>		<b>1</b>	<b>8,911</b>	<b>10,426</b>	<b>10,367</b>	<b>10,498</b>	<b>10,918</b>	<b>6,591</b>	<b>7,245</b>	<b>8,726</b>	<b>25,442</b>	<b>26,654</b>	<b>30,070</b>

Notes: \*Transportation Network mode of access, (Uber, Lyft) was introduced in 2015 survey; Walk and Bike mode of access were introduced in 2019 survey

\* Totals may not add due to rounding

Source: Washington-Baltimore Regional Air Passenger Survey 2019

**Table 8: Drop-Off at Airport by Mode of Access (000s)**

Mode of Access		BWI			DCA			IAD			REGION		
		YES	NO	TOTAL	YES	NO	TOTAL	YES	NO	TOTAL	YES	NO	TOTAL
Private car	Number	2,579	1,933	4,512	1,412	570	1,982	2,119	843	2,962	6,110	3,345	9,456
	Percent	60%	90%	70%	34%	63%	39%	48%	89%	56%	47%	84%	56%
Rental car	Number	186	109	295	103	88	190	151	43	195	440	240	680
	Percent	4%	5%	5%	2%	10%	4%	3%	5%	4%	3%	6%	4%
Taxi	Number	143	6	149	516	11	526	675	5	680	1,334	22	1,355
	Percent	3%	0%	2%	12%	1%	10%	15%	1%	13%	10%	1%	8%
TNCs	Number	725	31	756	1,838	28	1,866	1,035	26	1,060	3597	85	3,682
	Percent	17%	1%	12%	44%	3%	37%	24%	3%	20%	28%	2%	22%
Metrorail (DCA)	Number	0	0	0	14	108	122	1	0	1	16	108	124
	Percent	0%	0%	0%	0%	12%	2%	0%	0%	0%	0%	3%	1%
Rail service	Number	73	25	98	12	0	12	0	0	0	85	25	110
	Percent	2%	1%	2%	0%	0%	0%	0%	0%	0%	1%	1%	1%
Light Rail (BWI)	Number	1	0	1	0	0	0	0	0	0	1	0	1
	Percent	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Airport shuttle / Limo	Number	144	18	163	81	2	82	83	7	89	308	27	334
	Percent	3%	1%	3%	2%	0%	2%	2%	1%	2%	2%	1%	2%
Hotel shuttle bus	Number	255	14	269	122	26	148	205	14	219	581	54	635
	Percent	6%	1%	4%	3%	3%	3%	5%	1%	4%	5%	1%	4%
Metrobus/MTA Bus	Number	26	1	27	10	7	17	24	4	29	61	12	73
	Percent	1%	0%	0%	0%	1%	0%	1%	0%	1%	0%	0%	0%
Walked	Number	0	7	7	0	0	0	4	0	4	4	7	11
	Percent	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Biked	Number	0	0	0	0	0	0	0	0	0	0	0	0
	Percent	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Other	Number	197	8	205	87	68	155	87	2	89	371	78	449
	Percent	5%	0%	3%	2%	8%	3%	2%	0%	2%	3%	2%	3%
<b>TOTAL</b>	<b>Number</b>	<b>4,330</b>	<b>2,152</b>	<b>6,482</b>	<b>4,194</b>	<b>907</b>	<b>5,100</b>	<b>4,384</b>	<b>944</b>	<b>5,328</b>	<b>12,907</b>	<b>4,003</b>	<b>16,910</b>
	<b>Percent</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Notes:

\* Walk and Bike mode of access, were introduced in 2019 survey

\* Totals may not add due to rounding

\* Totals do not include non-respondents.

Source: Washington-Baltimore Regional Air Passenger Survey 2019

**Table 9: Mode of Access by Resident Status, Region (000s)**

Mode of Access		Residents			Non-Residents			TOTAL		
		2015	2017	2019	2015	2017	2019	2015	2017	2019
Private car	Number	4,577	5,143	4,834	3,771	4,036	2,992	8,348	9,179	7,826
	Percent	75%	65%	57%	33%	36%	29%	48%	48%	40%
Rental car	Number	61	83	97	2,684	2,183	2,017	2,745	2,266	2,114
	Percent	1%	1%	1%	24%	20%	19%	16%	12%	11%
Taxi	Number	720	605	411	2,173	1,384	1,103	2,893	1,989	1,514
	Percent	12%	8%	5%	19%	12%	11%	17%	10%	8%
Transportation Network Company (Uber, Lyft, etc.)	Number	669	1,270	1,839	669	1,270	1,839	1,883	2,852	4,662
	Percent	8%	16%	22%	6%	11%	18%	11%	15%	24%
Metrorail (DCA)	Number	353	349	320	653	735	608	1,006	1,084	928
	Percent	6%	4%	4%	6%	7%	6%	6%	6%	5%
Rail service	Number	49	96	73	101	129	140	150	225	213
	Percent	1%	1%	1%	1%	1%	1%	1%	1%	1%
Light Rail (BWI)	Number	20	12	8	4	12	8	24	46	23
	Percent	0%	0%	0%	0%	0%	0%	0%	0%	0%
Airport bus/ Van/Limo	Number	178	135	175	572	240	328	750	375	503
	Percent	3%	2%	2%	5%	2%	3%	4%	2%	3%
Hotel/motel courtesy bus	Number	80	50	327	1,021	724	788	1,101	774	1,115
	Percent	1%	1%	4%	9%	7%	8%	6%	4%	6%
Metrobus / MTA Bus	Number	49	60	121	127	83	169	176	143	290
	Percent	1%	1%	1%	1%	1%	2%	1%	1%	1%
Walked	Number	N/A	N/A	2	N/A	N/A	2	N/A	N/A	4
	Percent			0%			0%			0%
Biked	Number	N/A	N/A	0	N/A	N/A	0	N/A	N/A	0
	Percent			0%			0%			0%
Other	Number	27	94	251	242	290	367	269	384	618
	Percent	0%	1%	3%	2%	3%	4%	2%	2%	3%
<b>TOTAL</b>	<b>Number</b>	<b>6,114</b>	<b>7,897</b>	<b>8,456</b>	<b>11,348</b>	<b>11,086</b>	<b>10,359</b>	<b>17,462</b>	<b>19,317</b>	<b>19,806</b>
	<b>Percent</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Notes:

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

\* Walk and Bike mode of access, were introduced in 2019 survey

Source: Washington-Baltimore Regional Air Passenger Survey 2019

**Table 10: Mode of Access by Trip Purpose (000s)**

<b>Mode of Access</b>		<b>Work</b>	<b>Non-Work</b>	<b>Unknown</b>	<b>Total</b>
Private car	<i>Number</i>	2,457	7,741	1,496	11,694
	<i>Percent</i>	28%	49%	37%	41%
Rental car	<i>Number</i>	1,099	1,440	344	2,883
	<i>Percent</i>	13%	9%	9%	10%
Taxi	<i>Number</i>	1,036	1,092	357	2,484
	<i>Percent</i>	12%	7%	9%	9%
TNCs	<i>Number</i>	2,703	3,050	1,103	6,855
	<i>Percent</i>	31%	19%	27%	24%
Metrorail (DCA)	<i>Number</i>	366	671	237	1,274
	<i>Percent</i>	4%	4%	6%	4%
Rail Service	<i>Number</i>	62	198	21	281
	<i>Percent</i>	1%	1%	1%	1%
Light Rail (BWI)	<i>Number</i>	14	11	9	34
	<i>Percent</i>	0%	0%	0%	0%
Airport Shuttle/Limo	<i>Number</i>	166	357	106	628
	<i>Percent</i>	2%	2%	3%	2%
Hotel Bus	<i>Number</i>	440	678	189	1,307
	<i>Percent</i>	5%	4%	5%	5%
MTA/Metrobus	<i>Number</i>	81	287	22	391
	<i>Percent</i>	1%	2%	1%	1%
Walked	<i>Number</i>	4	11	3	18
	<i>Percent</i>	0%	0%	0%	0%
Biked	<i>Number</i>	0	0	3	3
	<i>Percent</i>	0%	0%	0%	0%
Other	<i>Number</i>	216	357	121	694
	<i>Percent</i>	3%	2%	3%	2%
<b>TOTAL</b>	<i>Number</i>	<b>8,643</b>	<b>15,894</b>	<b>4,010</b>	<b>28,547</b>
	<i>Percent</i>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Non-Respondents		338	540	675	1,553
<b>Total Originations</b>		<b>8,981</b>	<b>16,434</b>	<b>4,685</b>	<b>30,100</b>

Notes:

\* Totals may not add due to rounding

Source: Washington-Baltimore Regional Air Passenger Survey 2019

\* Walk and Bike mode of access, were introduced in 2019 survey

**Table 11: Mode of Access by Trip Origination (000s)**

Mode of Access		Home	Non-Home	Unknown	Total
Private car	Number	9,381	1,173	1,002	11,556
	Percent	62%	11%	38%	41%
Rental car	Number	683	1,861	273	2,817
	Percent	5%	18%	10%	10%
Taxi	Number	804	1,435	208	2,446
	Percent	5%	14%	8%	9%
TNCs	Number	2,997	2,990	742	6,729
	Percent	20%	29%	28%	24%
Metrorail (DCA)	Number	424	646	165	1,235
	Percent	3%	6%	6%	4%
Rail service	Number	75	170	14	259
	Percent	1%	2%	1%	1%
Light Rail (BWI)	Number	11	14	1	26
	Percent	0%	0%	0%	0%
Airport Shuttle/Limo	Number	169	349	69	587
	Percent	1%	3%	3%	2%
Hotel Shuttle	Number	84	1,121	95	1,300
	Percent	1%	11%	4%	5%
MTA/Metrobus	Number	125	196	20	340
	Percent	1%	2%	1%	1%
Walked	Number	0	15	3	18
	Percent	0%	0%	0%	0%
Biked	Number	0	0	0	0
	Percent	0%	0%	0%	0%
Other	Number	258	339	61	658
	Percent	2%	3%	2%	2%
<b>TOTAL</b>	Number	<b>15,011</b>	<b>10,308</b>	<b>2,653</b>	<b>27,971</b>
	Percent	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Non-Respondents		326	311	828	1,466
<b>Total Originations</b>		<b>15,337</b>	<b>10,619</b>	<b>3,481</b>	<b>29,437</b>

Notes:

\* Totals may not add due to rounding

\* Walk and Bike mode of access, were introduced in 2019 survey

Source: Washington-Baltimore Regional Air Passenger Survey 2019

**Table 12: Mode of Access and Age (000s)**

Mode of Access		Age Group						Total
		18 or Younger	19 - 24 Years	25 - 34 Years	35 - 49 Years	50 - 64 Years	65 or Older	
Private Car	Number	195	718	1,882	2,470	2,823	1,725	9,813
	Percent	41%	41%	39%	38%	42%	45%	41%
Rental Car	Number	69	69	401	722	822	425	2,508
	Percent	14%	4%	8%	11%	12%	11%	10%
Taxi	Number	24	66	229	578	679	536	2,112
	Percent	5%	4%	5%	9%	10%	14%	9%
TNCs	Number	45	501	1,507	1,764	1,362	586	5,766
	Percent	9%	28%	32%	27%	20%	15%	24%
Metrorail (DCA)	Number	16	137	246	267	284	107	1,058
	Percent	3%	8%	5%	4%	4%	3%	4%
Rail Service	Number	0	54	102	40	26	47	269
	Percent	0%	3%	2%	1%	0%	1%	1%
Light Rail (BWI)	Number	0	2	7	6	7	3	25
	Percent	0%	0%	0%	0%	0%	0%	0%
Airport Shuttle /Limo	Number	1	34	89	143	170	102	539
	Percent	0%	2%	2%	2%	3%	3%	2%
Hotel Shuttle	Number	64	70	138	306	322	176	1,077
	Percent	13%	4%	3%	5%	5%	5%	4%
Metrobus/MTA Bus	Number	55	53	57	68	44	40	318
	Percent	11%	3%	1%	1%	1%	1%	1%
Walked	Number	0	3	0	4	1	8	16
	Percent	0%	0%	0%	0%	0%	0%	0%
Biked	Number	0	0	0	0	0	0	0
	Percent	0%	0%	0%	0%	0%	0%	0%
Other	Number	12	64	113	176	141	62	568
	Percent	2%	4%	2%	3%	2%	2%	2%
<b>TOTAL</b>	<b>Number</b>	<b>481</b>	<b>1,771</b>	<b>4,772</b>	<b>6,542</b>	<b>6,682</b>	<b>3,819</b>	<b>24,068</b>
	<b>Percent</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Notes:

\* Non-Respondents not included

\* Walk and Bike mode of access, were introduced in 2019 survey

Source: Washington-Baltimore Regional Air Passenger Survey 2019



**Table 13: Parking by Airport (000s)**

Parking Facility Use		BWI	DCA	IAD	Total
<b>Not Parked</b>	<i>Number</i>	6,782	9,510	6,731	23,023
	<i>Percent</i>	65%	87%	77%	77%
<b>Hourly Parking Lot</b>	<i>Number</i>	354	18	10	382
	<i>Percent</i>	3%	0%	0%	1%
<b>Daily Parking Garage</b>	<i>Number</i>	588	9	4	601
	<i>Percent</i>	6%	0%	0%	2%
<b>Express Parking Lot</b>	<i>Number</i>	106	0	0	106
	<i>Percent</i>	1%	0%	0%	0%
<b>Long-Term A/B Parking Garage</b>	<i>Number</i>	559	0	0	559
	<i>Percent</i>	5%	0%	0%	2%
<b>Short-Term Hourly Parking</b>	<i>Number</i>	0	148	250	398
	<i>Percent</i>	0%	1%	3%	1%
<b>Long-Term / Daily Parking</b>	<i>Number</i>	0	207	296	503
	<i>Percent</i>	0%	2%	3%	2%
<b>Long-Term / Economy Parking</b>	<i>Number</i>	3	154	242	399
	<i>Percent</i>	0%	1%	3%	1%
<b>BWI Rail Station Garage</b>	<i>Number</i>	20	0	0	20
	<i>Percent</i>	0%	0%	0%	0%
<b>Valet Parking</b>	<i>Number</i>	29	7	17	53
	<i>Percent</i>	0%	0%	0%	0%
<b>Off Airport Private Parking</b>	<i>Number</i>	310	0	0	310
	<i>Percent</i>	3%	0%	0%	1%
<b>Non-Respondents</b>	<i>Number</i>	1,675	865	1,176	3,716
	<i>Percent</i>	16%	8%	13%	12%
<b>TOTAL</b>	<i>Number</i>	<b>10,426</b>	<b>10,918</b>	<b>8,726</b>	<b>30,070</b>
	<i>Percent</i>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Notes:

\* Totals may not add due to rounding

**Table 15: Drop-off by Airport (000s)**

Drop-off		BWI	DCA	IAD	Total
Yes	Number	3,447	3,766	3,829	11,042
	Percent	48%	51%	60%	52%
No	Number	1,970	609	874	3,453
	Percent	27%	8%	14%	16%
Non-Respondents	Number	1,814	3,062	1,665	6,541
	Percent	25%	41%	26%	31%
<b>Total</b>		<b>7,231</b>	<b>7,437</b>	<b>6,368</b>	<b>21,036</b>
		<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Notes:

\* Totals may not add due to rounding

\* Only includes Private Car, Taxi and Transportation Networks

**Table 14: Carpool by Airport (000s)**

Carpool		BWI	DCA	IAD	Total
Yes	Number	1,814	2,192	1,681	5,687
	Percent	21%	26%	24%	24%
No	Number	3,723	3,981	3,588	11,292
	Percent	44%	48%	50%	47%
Non-Respondents	Number	2,946	2,106	1,881	6,933
	Percent	35%	25%	26%	29%
<b>Total</b>		<b>8,483</b>	<b>8,279</b>	<b>7,150</b>	<b>23,912</b>
		<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Notes:

\* Totals may not add due to rounding

\* Only includes Private Car, rental Car, Taxi and Transportation Networks

### III. FINDINGS - 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 responses to these questions.

#### Resident Status (Survey Questions D-1 & D-2)

Table 16 summarizes resident status for locally originating air passengers in 2015, 2017, and 2019. At the regional level, the Resident/Non-Resident breakdown was 59/41 percent. BWI and IAD were very similar at 46/54 and 45/55 percent, respectively.

**Table 16: Resident Status by Airport (000s)**

Resident Status		BWI			DCA			IAD			REGION		
		2015	2017	2019	2015	2017	2019	2015	2017	2019	2015	2017	2019
Resident	Number	2,531	3,043	3,202	2,440	2,842	2,586	1,851	2,247	2,297	6,822	8,132	8,085
	Percent	36%	42%	46%	29%	34%	34%	44%	49%	45%	35%	40%	41%
Non-Resident	Number	4,447	4,213	3,733	5,989	5,480	5,089	2,389	2,327	2,761	12,825	12,020	11,583
	Percent	64%	58%	54%	71%	66%	66%	56%	51%	55%	65%	60%	59%
TOTAL	Number	6,978	7,256	6,935	8,429	8,322	7,675	4,240	4,574	5,058	19,647	20,152	19,668
	Percent	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

Notes:

\* Totals do not include non-respondents and resident unknown

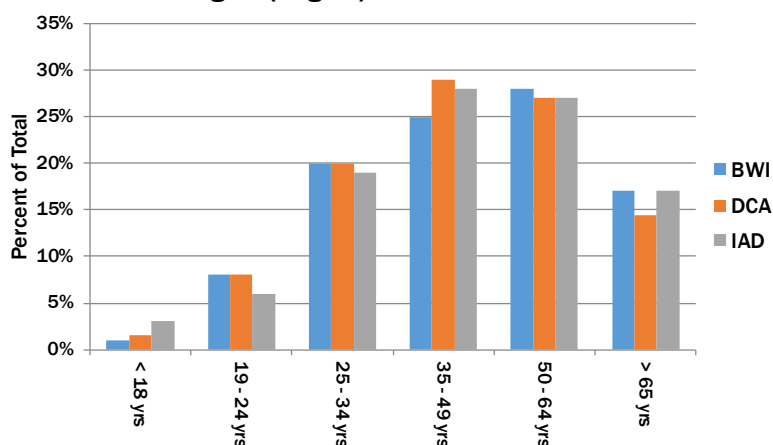
\* Totals may not add due to rounding

Source: Washington-Baltimore Regional Air Passenger Survey 2019

#### Age (Survey Question D-5)

The share of local originating passengers over the age of 65 grew from 14 to 16 percent, while passengers age 50 to 64 decreased from 30 to 28 percent. Passengers age 35 to 49 decreased from 28 to 27 percent, while passengers age 25 to 34 increased from 19 to 20 percent. Passengers age 19 to 24 and 18 or younger remained the same at seven percent and two percent, respectively. Figure 15 graphically depicts the age distribution by airport. For further detail, see Table 17.

**Figure 15: Age Distribution of Locally Originating Air Passengers (Region)**



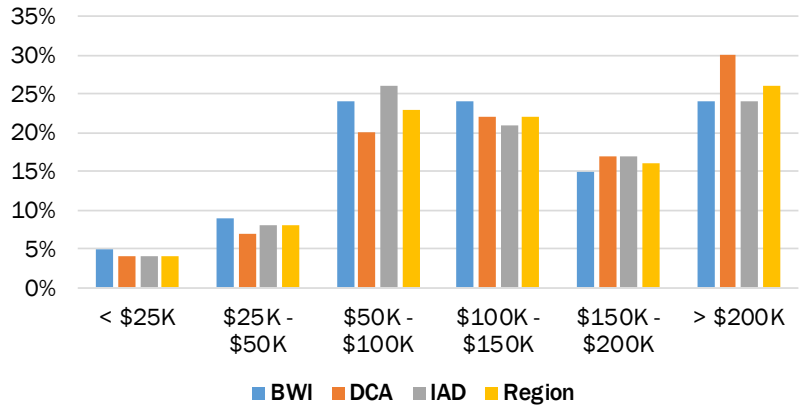
Note: Non-respondents are not included

Source: Washington-Baltimore Regional Air Passenger Survey 2019

## Income (Survey Question D-6)

Household incomes for air travelers in the Washington-Baltimore region continue to be higher than the regional median. Table 18 shows originating air passenger household income data at the three airports and in the region, while Table 19 shows income by resident status. Figure 16 graphically depicts the distribution by income and airport. In 2019, only 35 percent of the region's passengers had household incomes less than \$100,000. Over a quarter of the region's air passengers (26 percent) had household incomes over \$200,000.

**Figure 16: Income Distribution of Locally Originating Air Passengers (Region)**



Source: Washington-Baltimore Regional Air Passenger Survey 2019

**Table 17: Age by Airport (000s)**

Age Group		BWI			DCA			IAD			REGION		
		2015	2017	2019	2015	2017	2019	2015	2017	2019	2015	2017	2019
<b>18 or Younger</b>	Number	119	125	104	194	148	181	79	108	211	392	381	496
	Percent	1%	2%	1%	2%	2%	2%	1%	2%	3%	2%	2%	2%
<b>19 to 24 Years</b>	Number	501	705	687	649	645	686	296	407	436	1,446	1,757	1,809
	Percent	6%	9%	8%	7%	7%	8%	5%	7%	6%	6%	7%	7%
<b>25 to 34 Years</b>	Number	1,483	1,564	1,707	2,047	1,761	1,776	1,062	1,289	1,416	4,592	4,614	4,899
	Percent	18%	19%	20%	21%	19%	20%	18%	21%	19%	19%	19%	20%
<b>35 to 49 Years</b>	Number	2,022	2,073	2,117	2,723	2,705	2,558	1,708	1,780	2,029	6,453	6,558	6,704
	Percent	25%	25%	25%	28%	29%	29%	29%	29%	28%	27%	28%	27%
<b>50 to 64 Years</b>	Number	2,600	2,489	2,376	2,799	2,881	2,425	1,792	1,717	1,953	7,191	7,087	6,754
	Percent	32%	30%	28%	29%	31%	27%	30%	28%	27%	31%	30%	28%
<b>65 or Older</b>	Number	1,292	1,231	1,449	1,232	1,283	1,217	979	913	1,231	3,503	3,427	3,897
	Percent	16%	15%	17%	13%	14%	14%	17%	15%	17%	15%	14%	16%
<b>TOTAL</b>	Number	<b>8,017</b>	<b>8,187</b>	<b>8,440</b>	<b>9,644</b>	<b>9,423</b>	<b>8,843</b>	<b>5,916</b>	<b>6,214</b>	<b>7,276</b>	<b>23,577</b>	<b>23,824</b>	<b>24,559</b>
	Percent	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Non-Respondents		468	723	1,986	723	1,076	2,074	675	1,031	1,449	1,866	2,830	5,509
Total Originations		8,485	8,910	10,426	10,367	10,499	10,917	6,591	7,245	8,725	25,443	26,654	30,068

Notes:

\* Totals may not add due to rounding

Source: Washington-Baltimore Regional Air Passenger Survey 2019

**Table 18: Household Income by Airport (000s)**

Annual Household Income		BWI	DCA	IAD	REGION
Less than \$25,000	Number	335	328	212	875
	Percent	5%	4%	4%	4%
\$25,000 - \$49,000	Number	622	546	453	1,621
	Percent	9%	7%	8%	8%
\$50,000 - \$100,000	Number	1,703	1,495	1,416	4,614
	Percent	24%	20%	26%	23%
\$100,000 - \$150,000	Number	1,670	1,618	1,154	4,442
	Percent	24%	22%	21%	22%
\$150,000 - \$200,000	Number	1,023	1,256	900	3,179
	Percent	15%	17%	17%	16%
\$200,000 and up	Number	1,649	2,205	1,300	5,154
	Percent	24%	30%	24%	26%
<b>TOTAL</b>	Number	7,002	7,448	5,435	19,885
	Percent	100%	100%	100%	100%
Non-Respondents		3,420	3,475	3,296	10,191
<b>Total Originations</b>		<b>10,422</b>	<b>10,923</b>	<b>8,731</b>	<b>30,076</b>

Notes:

\* Totals may not add due to rounding

Source: Washington-Baltimore Regional Air Passenger Survey 2019

**Table 19: Household Income by Resident Status (000s)**

Annual Household Income		Resident Status			
		Resident	Non-Resident	Unknown	Total
Less than \$25,000	Number	218	399	258	875
	Percent	3%	4%	6%	4%
\$25,000 - \$49,000	Number	430	730	461	1,621
	Percent	7%	8%	12%	8%
\$50,000 - \$100,000	Number	1,288	2,239	1,087	4,614
	Percent	20%	24%	27%	23%
\$100,000 - \$150,000	Number	1,453	2,198	791	4,442
	Percent	22%	24%	20%	22%
\$150,000 - \$200,000	Number	1,147	1,426	606	3,179
	Percent	17%	15%	15%	16%
\$200,000 and up	Number	2,031	2,353	770	5,154
	Percent	31%	25%	19%	26%
<b>TOTAL</b>	Number	6,567	9,345	3,973	19,885
	Percent	100%	100%	100%	100%
Non-Respondents		1,516	2,245	6,430	10,191
<b>Total Originations</b>		<b>8,083</b>	<b>11,590</b>	<b>10,403</b>	<b>30,076</b>

Notes:

\* Totals may not add due to rounding

Source: Washington-Baltimore Regional Air Passenger Survey 2019

## IV. FINDINGS - AIR TRAVELER SPENDING

Two new questions related to air traveler spending were added to the 2019 survey: Mode of Access Spending (Question B8) and Airport Concessions Spending (Question D7)

### Mode of Access Spending (Survey Question B-8)

Survey participants were given the option of seven ground access travel cost fields ranging from \$0 to \$100+. Of those ranges, TNCs were the dominant mode for the \$10-\$99 ranges. Of the 35 percent of air passengers who report spending no money on their mode of access, 77 percent travel by private car. Approximately 40 percent of non-work trips spend nothing on travel, versus 25 percent of work-related trips. Overall, work-related trips also tend to spend more on travel than those traveling on non-work trips.

#### Mode (Table 20)

- No cost: 77% by private car
- \$1-\$4: 35% by Metrorail to DCA; 47% by private car
- \$5-\$9: 51% by private car
- \$10-\$24: 51% by ride-hailing
- \$25-\$49: 58% by ride-hailing
- \$50-\$99: 38% by ride-hailing
- \$100 or more: 71% are rental cars

#### Airport (Table 21)

- No Cost: 35% overall; 43% at BWI
- \$1-\$4: 10% at DCA
- \$5-\$9: Nearly equal; 8% at BWI
- \$10-\$24: 30% at DCA
- \$25-\$49: 22% at IAD
- \$50-\$99: 12% at IAD
- \$100 or more: 9% at BWI

#### Trip Purpose (Table 22)

- 40% of non-work trips spend nothing on travel, versus 25% of work-related trips.
- Work-related trips tend to spend more on travel than those traveling on non-work trips.

**Table 20: Mode of Access Cost by Mode (000s)**

Mode of Access		Travel Cost							Total
		None	\$1 - \$4	\$5 - \$9	\$10 - \$24	\$25 - \$49	\$50 - \$99	\$100 +	
Private car	Number	6,520	849	889	803	461	259	178	9,958
	Percent	76.7%	46.5%	50.9%	17.3%	10.9%	13.8%	10.7%	40.7%
Rental car	Number	389	50	64	188	240	305	1,173	2,410
	Percent	4.6%	2.8%	3.7%	4.1%	5.7%	16.2%	70.9%	9.9%
Taxi	Number	107	15	56	724	789	467	72	2,230
	Percent	1.3%	0.8%	3.2%	15.6%	18.7%	24.9%	4.3%	9.1%
TNC	Number	222	40	104	2,368	2,441	719	87	5,980
	Percent	2.6%	2.2%	5.9%	51.1%	57.8%	38.3%	5.3%	24.5%
Metrorail (DCA)	Number	47	642	312	60	13	1	18	1,092
	Percent	0.6%	35.1%	17.9%	1.3%	0.3%	0.0%	1.1%	4.5%
Rail service	Number	5	6	90	118	25	2	12	259
	Percent	0.1%	0.3%	5.1%	2.5%	0.6%	0.1%	0.7%	1.1%
Light Rail (BWI)	Number	1	18	5	1	0	0	0	25
	Percent	0.0%	1.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.1%
Airport bus/Van/Limo	Number	188	42	34	69	99	78	43	554
	Percent	2.2%	2.3%	1.9%	1.5%	2.3%	4.1%	2.6%	2.3%
Hotel shuttle	Number	718	98	69	99	48	12	31	1,076
	Percent	8.5%	5.4%	4.0%	2.1%	1.1%	0.7%	1.9%	4.4%
Metrobus/MTA Bus	Number	25	44	103	103	23	3	5	305
	Percent	0.3%	2.4%	5.9%	2.2%	0.5%	0.1%	0.3%	1.2%
Walked	Number	12	0	0	0	3	0	1	15
	Percent	0.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.1%	0.1%
Biked	Number	0	0	0	3	0	0	0	3
	Percent	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%
Other	Number	263	22	20	98	82	30	36	551
	Percent	3.1%	1.2%	1.2%	2.1%	1.9%	1.6%	2.2%	2.3%
<b>TOTAL</b>	<b>Number</b>	<b>8,498</b>	<b>1,826</b>	<b>1,746</b>	<b>4,634</b>	<b>4,224</b>	<b>1,876</b>	<b>1,656</b>	<b>24,459</b>
	<b>Percent</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Notes:

\* Non-Respondents not included

Source: Washington-Baltimore Regional Air Passenger Survey 2019



**Table 21: Mode of Access Cost by Airport (000s)**

Travel Cost		BWI	DCA	IAD	REGION
<b>None</b>	<i>Number</i>	3,672	2,192	2,720	<b>8,584</b>
	<i>Percent</i>	43%	24%	38%	<b>35%</b>
<b>\$1 - \$4</b>	<i>Number</i>	603	951	291	<b>1,845</b>
	<i>Percent</i>	7%	10%	4%	<b>7%</b>
<b>\$5 - \$9</b>	<i>Number</i>	662	657	439	<b>1,758</b>
	<i>Percent</i>	8%	7%	6%	<b>7%</b>
<b>\$10 - \$24</b>	<i>Number</i>	1,125	2,755	809	<b>4,690</b>
	<i>Percent</i>	13%	30%	11%	<b>19%</b>
<b>\$25 - \$49</b>	<i>Number</i>	1,107	1,608	1,571	<b>4,285</b>
	<i>Percent</i>	13%	18%	22%	<b>17%</b>
<b>\$50 - \$99</b>	<i>Number</i>	581	494	829	<b>1,904</b>
	<i>Percent</i>	7%	5%	12%	<b>8%</b>
<b>\$100.00 +</b>	<i>Number</i>	764	444	495	<b>1,703</b>
	<i>Percent</i>	9%	5%	7%	<b>7%</b>
<b>TOTAL</b>	<i>Number</i>	<b>8,514</b>	<b>9,101</b>	<b>7,153</b>	<b>24,769</b>
	<i>Percent</i>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Non-Respondents		<b>1,912</b>	<b>1,817</b>	<b>1,573</b>	<b>5,302</b>
<b>Total Originations</b>		<b>10,426</b>	<b>10,918</b>	<b>8,726</b>	<b>30,070</b>

*Notes:*

*\* Totals may not add due to rounding*

Source: Washington-Baltimore Regional Air Passenger Survey 2019

**Table 22: Ground Access Cost by Trip Purpose (000s)**

Travel Cost		Trip Purpose								
		Federal Gov.	State/Local Gov.	Commercial Business	Vacation	Personal Family	School-Related	Other	Non Respondent	Total
None	Number	739	98	1,248	2,571	2,802	576	65	486	8,584
	Percent	26%	21%	25%	39%	42%	40%	34%	30%	35%
\$1 - \$4	Number	280	37	319	499	497	90	11	113	1,845
	Percent	10%	8%	6%	7%	7%	6%	6%	7%	7%
\$5 - \$9	Number	190	17	252	494	517	152	9	126	1,758
	Percent	7%	4%	5%	7%	8%	10%	5%	8%	7%
\$10 - \$24	Number	651	124	1,105	1,071	1,067	280	39	352	4,690
	Percent	23%	27%	22%	16%	16%	19%	21%	22%	19%
\$25 - \$49	Number	501	96	1,100	1,104	926	212	36	311	4,285
	Percent	18%	21%	22%	17%	14%	15%	19%	19%	17%
\$50 - \$99	Number	217	43	498	574	360	83	27	102	1,904
	Percent	8%	9%	10%	9%	5%	6%	14%	6%	8%
\$100 +	Number	230	48	410	352	481	59	3	119	1,703
	Percent	8%	10%	8%	5%	7%	4%	2%	7%	7%
<b>TOTAL</b>	Number	<b>2,809</b>	<b>462</b>	<b>4,932</b>	<b>6,665</b>	<b>6,649</b>	<b>1,452</b>	<b>190</b>	<b>1,610</b>	<b>24,769</b>
	Percent	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Non-Respondents		229	55	464	599	838	230	28	2,857	5,302
<b>Total Originations</b>		<b>3,038</b>	<b>517</b>	<b>5,396</b>	<b>7,265</b>	<b>7,487</b>	<b>1,682</b>	<b>219</b>	<b>4,467</b>	<b>30,070</b>

Notes:

\* Totals may not add due to rounding

Source: Washington-Baltimore Regional Air Passenger Survey 2019

## Airport Concessions Spending (Survey Question D-7)

Most air passengers reported spending between \$1-\$24 on airport concessions – 84 percent of originating air passengers and 63 percent of local originating air passengers – while 23 percent of overall air passengers do not spend money at the airport. The highest household income bracket spent most in each range while the lowest income bracket spent least in each range. A greater proportion of local originating passengers spent larger sums (\$25-\$100+).

### Income (Table 23)

The highest income bracket spent most in each range while the lowest income bracket spent least in each range. Households earning \$150-200K spent less than those earning \$50-100K and \$100-150K.

### Time Spent at Airport (Table 24)

Approximately, 23% of overall air passengers do not spend money at the airport. Most spend between \$1-\$24, with little variation based on time spent at the airport. For the last three price brackets, most spending happens with those at the airport for the least and greatest amounts of time.

### Arrival Type (Table 25)

Overall, 19% of originating and 8% of connecting passengers do not make purchases, while 84% of connecting and 63% of local originating passengers spend \$1-\$24. A greater proportion of local originating passengers spend larger sums (\$25-\$100+).

**Table 23: Airport Spending by Household Income (000s)**

Annual Household Income		Money Spent At Airport					Total
		None	\$1-\$24	\$25-\$49	\$50-\$99	\$100+	
Less than \$25,000	Number	323	386	81	26	34	<b>849</b>
	Percent	7%	4%	3%	2%	7%	<b>4%</b>
\$25,000 - \$50,000	Number	433	810	201	78	39	<b>1,560</b>
	Percent	10%	8%	6%	7%	8%	<b>8%</b>
\$50,000 - \$100,000	Number	1,044	2,402	719	221	133	<b>4,519</b>
	Percent	23%	23%	22%	21%	28%	<b>23%</b>
\$100,000 - \$150,000	Number	931	2,437	689	247	68	<b>4,372</b>
	Percent	21%	24%	22%	23%	14%	<b>22%</b>
\$150,000 - \$200,000	Number	655	1,683	597	143	69	<b>3,147</b>
	Percent	15%	16%	19%	14%	14%	<b>16%</b>
\$200,000 and up	Number	1,083	2,650	914	335	140	<b>5,122</b>
	Percent	24%	26%	29%	32%	29%	<b>26%</b>
<b>TOTAL</b>	Number	<b>4,468</b>	<b>10,367</b>	<b>3,201</b>	<b>1,050</b>	<b>482</b>	<b>19,569</b>
	Percent	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

Notes:

\* Non-Respondents not included

Source: Washington-Baltimore Regional Air Passenger Survey 2019

**Table 24: Airport Spending by Time Spent at Airport (000s)**

Money Spent at Airport		Time Spent At Airport Before Departure							Total
		0 - 15 Mins	15 - 30 Mins	30 - 45 Mins	45 - 60 Mins	60 - 90 Mins	90 - 120 Mins	120 + Mins	
<b>None</b>	<i>Number</i>	451	69	105	238	1,180	1,553	2,000	5,597
	<i>Percent</i>	23%	33%	37%	38%	33%	25%	18%	23%
<b>\$1 - \$24</b>	<i>Number</i>	921	97	133	339	1,953	3,577	5,884	12,905
	<i>Percent</i>	46%	47%	47%	54%	55%	58%	53%	54%
<b>\$25 - \$49</b>	<i>Number</i>	413	20	35	37	306	769	2,151	3,730
	<i>Percent</i>	21%	9%	12%	6%	9%	12%	19%	16%
<b>\$50 - \$99</b>	<i>Number</i>	120	14	7	7	49	203	788	1,188
	<i>Percent</i>	6%	7%	2%	1%	1%	3%	7%	5%
<b>\$100 or More</b>	<i>Number</i>	81	7	5	4	40	69	359	565
	<i>Percent</i>	4%	3%	2%	1%	1%	1%	3%	2%
<b>TOTAL</b>	<i>Number</i>	<b>1,987</b>	<b>207</b>	<b>284</b>	<b>625</b>	<b>3,528</b>	<b>6,172</b>	<b>11,184</b>	<b>23,986</b>
	<i>Percent</i>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>
Non-Respondents		3,728	51	44	97	380	499	1,287	6,085
Total Originations		5,714	258	327	721	3,908	6,671	12,471	30,070

Notes:

Source: Washington-Baltimore Regional Air Passenger Survey 2019

**Table 25: Airport Spending by Airport Arrival (000s)**

Money Spent at Airport		Originating Passengers	Connecting Passengers	Total
<b>None</b>	<i>Number</i>	5,597	599	6,196
	<i>Percent</i>	19%	8%	16%
<b>\$1 - \$24</b>	<i>Number</i>	18,989	6,481	25,470
	<i>Percent</i>	63%	84%	67%
<b>\$25 - \$50</b>	<i>Number</i>	3,730	455	4,185
	<i>Percent</i>	12%	6%	11%
<b>\$50 - \$99</b>	<i>Number</i>	1,188	152	1,339
	<i>Percent</i>	4%	2%	4%
<b>\$100 or More</b>	<i>Number</i>	565	63	629
	<i>Percent</i>	2%	1%	2%
<b>TOTAL</b>	<i>Number</i>	<b>30,070</b>	<b>7,750</b>	<b>37,820</b>
	<i>Percent</i>	<b>100%</b>	<b>100%</b>	<b>100%</b>

\* Non-Respondents not included

Source: Washington-Baltimore Regional Air Passenger Survey 2019

# APPENDIX A: SURVEY METHODOLOGY

The following is a summary of the methodology used to conduct the Washington-Baltimore Regional Air Passenger Survey 2019.

## 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: Baltimore/Washington Thurgood Marshall International Airport (BWI), Ronald Reagan Washington National Airport (DCA), and Washington Dulles International Airport (IAD). It was designed to be compatible with the previous surveying efforts conducted in 1981/82, 1987, 1992, 1998, 2000, 2002, 2005, 2007, 2009, 2011, 2013 and 2015, so that comparative analysis could be performed.

## Changes in Survey Design Since 2011

For surveys conducted through 2009, the samples for domestic flights were stratified by different regions of the United States: Northeast, New York Metropolitan Area, Mid-Atlantic, Southeast, Great Lakes, and West. For international flights, the samples were stratified into twenty-four different regions of the world. However, for surveys since 2011, both domestic and international flights were stratified by airline and destination frequencies (i.e., the higher the scheduled flight frequency to a destination, the higher the number of flights sampled and vice versa).

## Sample Selection

For the 2019 sample selection there were 367 strata – 290 for domestic and 77 for international destinations, respectively, for all three airports combined. All flights selected for surveying were scheduled during a two-week period beginning Wednesday, October 16<sup>th</sup> and extending through Tuesday October 29<sup>th</sup>, 2019. Flights that were missed and those that required resurveying due to insufficient response rates were surveyed again during the subsequent two-week period, ending November 12<sup>th</sup>, 2019.

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 MWWA. 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 673 flights were drawn. The domestic flight distribution consisted of 229 at BWI, 217 at DCA, and 143 at IAD, for a total of 589 domestic flights. An additional 84 international flights were drawn and distributed among the airports as follows: 15 at BWI, 10 at DCA, and 59 at IAD.

The sample was reviewed by MWWA and MAA with corrections or changes being made as necessary, including any new flights that were to be added during the survey period. These additions were then

used to select the final flight sample. The flights were listed by airport, date, and departure time, to enable manpower requirements to be calculated and staff time to be scheduled.

The survey only involved departing passengers. Arriving passengers were not surveyed, primarily due to limited resources. Additionally, it would have been difficult to maintain arriving passengers' attention as they proceeded to their connecting flights, baggage claim, or 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 2019 air passenger survey took place during the two-week period from Wednesday, October 16<sup>th</sup> to Tuesday, October 29<sup>th</sup>. Flights requiring resurveying occurred between October 30<sup>th</sup> and November 12<sup>th</sup>. Approximately 23,858 out of a total of 90,964 enplaning passengers on 673 randomly selected flights (589 domestic and 84 international) completed surveys as they waited to board their planes, an overall response rate of 28.4 percent. All 23,858 completed survey questionnaires have been processed and tabulated.<sup>3</sup>

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 selected flight, based on the size of the aircraft and how many passengers were expected. Self-administered questionnaires were distributed to the passengers in the gate area as they checked-in and waited to board. The questionnaires were collected as the passengers completed them, or when the flight was called for boarding. Late-arriving passengers were given a questionnaire with a self-addressed postage paid mail-back envelope. These passengers were asked to complete the questionnaire en route and drop it in the mail upon arrival at their destination. In the 2019 survey, respondents were also given the option of responding through an online questionnaire. A copy of the survey questionnaire is included in this report as Appendix B. A copy of the Survey Procedures for the 2019 Air Passenger Survey is included in this report as Appendix C.

## Factoring the Survey Data

Since the survey was conducted over two weeks in October 2017, 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 the fall travel period. 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 finally, observed annual enplanement of regional air travel was obtained from MWAA for DCA and IAD and from MAA for BWI.

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<sup>3</sup> Families or groups traveling together may complete one questionnaire for their group, although it is preferable to have each individual over the age of 16 complete their own questionnaire.

## Level of Confidence

For the overall region, 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, parameters 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

**Figure 17: 2019 Air Passenger Survey Instrument: BWI, DCA, IAD**

4. How many people live in your household, including yourself?  
 \_\_\_\_\_ Person(s) (Write '1' if you live alone)
5. Check your age group:  
 <sub>01</sub> 18 or younger       <sub>04</sub> 35-49  
 <sub>02</sub> 19-24             <sub>05</sub> 50-64  
 <sub>03</sub> 25-34             <sub>06</sub> 65 or older
6. What is your household's total annual income?  
 <sub>01</sub> Less than \$25,000     <sub>04</sub> \$100,000-\$149,999  
 <sub>02</sub> \$25,000-\$49,999     <sub>05</sub> \$150,000-\$199,999  
 <sub>03</sub> \$50,000-\$99,999     <sub>06</sub> \$200,000 or more
7. How much did you spend on airport concessions during your visit? (Include expenses only within the airport terminal area such as food, souvenirs, spa visit, etc. Do not include expenses outside of the airport terminal area such as parking.)  
 <sub>01</sub> \$0  
 <sub>02</sub> \$1-\$24  
 <sub>03</sub> \$25-\$49  
 <sub>04</sub> \$50-\$99  
 <sub>05</sub> \$100 or more

**E. PLEASE WRITE ANY COMMENTS YOU WOULD LIKE TO SHARE**

**Thanks for Your Help!**



**2019  
WASHINGTON – BALTIMORE  
REGIONAL AIR PASSENGER  
SURVEY**


TO DETERMINE LOCAL AIRPORT NEEDS  
**BWI**

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.

You can take this survey online by visiting

<http://gowba.info/air>

or scan the QR code below.



ID number below is required to access online survey.

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.

ID NUMBER (PASSWORD)

**AIR PASSENGER SURVEY – BWI AIRPORT**

**A. ABOUT YOUR TRIP TODAY**

1. How did you get to Baltimore/Washington International Thurgood Marshall Airport for this trip? (Check ONE answer)  
 <sub>01</sub> By GROUND TRANSPORTATION (e.g., car, taxi, ride-hailing, Metro, etc.)  
 If this was your selection, continue to QUESTION #2  
 <sub>02</sub> I was on this flight when it arrived at this airport.  
 <sub>03</sub> I made a connection at this airport from a DOMESTIC FLIGHT...  
 <sub>04</sub> I made a connection at this airport from an INTERNATIONAL FLIGHT...  
 with \_\_\_\_\_ Airlines.  
**STOP – That is all we need to know.**

2. What is the final destination of your trip today?  
 \_\_\_\_\_  
 City

State/Province \_\_\_\_\_ Country \_\_\_\_\_

3. What is the primary purpose of your trip? (Check ONE answer)  
 <sub>01</sub> Business related to the federal government (Including military)  
 <sub>02</sub> Business related to state or local government  
 <sub>03</sub> Business that is not related to government  
 <sub>04</sub> Vacation or holiday  
 <sub>05</sub> Personal or family affairs  
 <sub>06</sub> Student or school related  
 <sub>05</sub> Other: \_\_\_\_\_

**B. ABOUT YOUR GROUND TRIP TO BWI MARSHALL AIRPORT:**

1. Where did you start your ground trip to this airport (BWI)? (Check ONE answer)  
 <sub>01</sub> Private residence  
 <sub>02</sub> Hotel/Motel  
 <sub>03</sub> Short term rental (e.g., Airbnb, VRBO)  
 <sub>04</sub> My regular place of employment  
 <sub>05</sub> Another place of business  
 <sub>05</sub> Other: \_\_\_\_\_

2. What is the address of the place you started your trip today?

Street Number	Street Name	City Quadrant (e.g., SW, NE)
---------------	-------------	------------------------------

City	State	Zip Code
------	-------	----------

Hotel/Motel or Business Name

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. How many people who came to the airport with you are on your flight?

\_\_\_\_\_ Person(s) (Including yourself)

6. How did you travel to this airport today? (Check ONE primary mode of travel)

- <sub>01</sub> Private Car
- <sub>02</sub> Rented Car
- <sub>03</sub> Taxi
- <sub>04</sub> Ride-hailing (e.g., Uber, Lyft)
- <sub>05</sub> Airport van/limo (e.g., SuperShuttle)
- <sub>06</sub> Hotel/Motel courtesy bus
- <sub>08</sub> Amtrak/MARC
- <sub>09</sub> Light Rail
- <sub>10</sub> Metrobus/MTA Bus/RTA Bus

<sub>11</sub> Walked from place where your trip started today

<sub>12</sub> Biked from place where your trip started today

<sub>05</sub> Other: \_\_\_\_\_

→ If you walked or biked to the airport, please describe your trip route, including your start and end point.

\_\_\_\_\_

7. What was your MAIN reason for choosing your mode of GROUND transportation to this airport TODAY? (Check ONE answer)

- <sub>01</sub> Cost
- <sub>02</sub> Reliability
- <sub>03</sub> Travel Time
- <sub>04</sub> Convenience
- <sub>05</sub> Comfort
- <sub>06</sub> Other: \_\_\_\_\_

8. How much did you spend on all ground transportation to this airport except parking?

- <sub>01</sub> \$0
- <sub>02</sub> \$1-\$4
- <sub>03</sub> \$5-\$9
- <sub>04</sub> \$10-\$24
- <sub>05</sub> \$25-\$49
- <sub>06</sub> \$50-\$99
- <sub>07</sub> \$100 or more

9. If you arrived in a private or rented car, taxi, or ride-hailing vehicle (e.g., Uber, Lyft) did you carpool with someone else? (Skip if does not apply)

<sub>01</sub> Yes <sub>02</sub> No

10. If you arrived in a private vehicle - excluding rental cars – answer below. (Skip if does not apply)

a. Were you dropped off at the terminal curbside?

<sub>01</sub> Yes <sub>02</sub> No

b. Where was that vehicle parked (after drop-off)?

- <sub>01</sub> It was not parked
- <sub>02</sub> Hourly Parking Garage
- <sub>03</sub> Daily Garage
- <sub>04</sub> Express Parking Lot
- <sub>05</sub> Long Term A or B
- <sub>06</sub> BWI Rail Station Garage
- <sub>07</sub> Off-Airport Private Parking
- <sub>11</sub> Valet Parking

### C. ABOUT YOUR AIRPORT CHOICE

1. Rank the three most important reasons for choosing BWI Marshall Airport for your flight today. (Write 1 for first choice, 2 for second, etc.)

- \_\_\_\_\_ Closest airport
- \_\_\_\_\_ Easy road access
- \_\_\_\_\_ Easy access by Metrorail or public transit
- \_\_\_\_\_ Convenient van/limo or shuttle bus service
- \_\_\_\_\_ Good parking facilities
- \_\_\_\_\_ More convenient flight times
- \_\_\_\_\_ Less expensive airfare
- \_\_\_\_\_ Only airport with non-stop flights
- \_\_\_\_\_ Only airport that serves my destination
- \_\_\_\_\_ Frequent flyer / airline loyalty program
- \_\_\_\_\_ Other: \_\_\_\_\_

2. Rank the region's airports in your order of preference. (Write 1 for first choice, 2 for second, etc.)

- \_\_\_\_\_ BWI Marshall
- \_\_\_\_\_ Washington Dulles International
- \_\_\_\_\_ Reagan Washington National

### D. ABOUT YOURSELF

1. If you live locally, how many nights will you be away?

\_\_\_\_\_ Night(s) (Write '0' if you will return today)

2. If you were visiting, how many nights did you stay in the area?

\_\_\_\_\_ Night(s) (Write '0' if you arrived today)

3. What is the location of your current residence?

City/County	State	Zip Code
-------------	-------	----------

\_\_\_\_\_ Country

Turn Page →

4. How many people live in your household, including yourself?

\_\_\_\_\_ Person(s) (Write '1' if you live alone)

5. Check your age group:

- <sub>01</sub> 18 or younger       <sub>04</sub> 35-49  
 <sub>02</sub> 19-24             <sub>05</sub> 50-64  
 <sub>03</sub> 25-34             <sub>06</sub> 65 or older

6. What is your household's total annual income?

- <sub>01</sub> Less than \$25,000     <sub>04</sub> \$100,000-\$149,999  
 <sub>02</sub> \$25,000-\$49,999     <sub>05</sub> \$150,000-\$199,999  
 <sub>03</sub> \$50,000-\$99,999     <sub>06</sub> \$200,000 or more

7. How much did you spend on airport concessions during your visit? (Include expenses only within the airport terminal area such as food, souvenirs, spa visit, etc. Do not include expenses outside of the airport terminal area such as parking.)

- <sub>01</sub> \$0  
 <sub>02</sub> \$1-\$24  
 <sub>03</sub> \$25-\$49  
 <sub>04</sub> \$50-\$99  
 <sub>05</sub> \$100 or more

E. PLEASE WRITE ANY COMMENTS YOU WOULD LIKE TO SHARE

Thanks for Your Help!



**2019  
WASHINGTON – BALTIMORE  
REGIONAL AIR PASSENGER  
SURVEY**  
TO DETERMINE LOCAL AIRPORT NEEDS  
DCA

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.

You can take this survey online by visiting

<http://gowba.info/air>

or scan the QR code below.



ID number below is required to access online survey.

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.

ID NUMBER (PASSWORD)

**AIR PASSENGER SURVEY – DCA AIRPORT**

**A. ABOUT YOUR TRIP TODAY**

1. How did you get to Ronald Reagan Washington National Airport for this trip? (Check ONE answer)

- <sub>01</sub> By GROUND TRANSPORTATION  
(e.g., car, taxi, ride-hailing, Metro, etc.)

If this was your selection, continue to QUESTION #2

- <sub>02</sub> I was on this flight when it arrived at this airport.  
 <sub>03</sub> I made a connection at this airport from a  
DOMESTIC FLIGHT...  
 <sub>04</sub> I made a connection at this airport from an  
INTERNATIONAL FLIGHT...

→ with \_\_\_\_\_ Airlines.

**STOP – That is all we need to know.**

2. What is the final destination of your trip today?

\_\_\_\_\_ City

\_\_\_\_\_ State/Province      \_\_\_\_\_ Country

3. What is the primary purpose of your trip?  
(Check ONE answer)

- <sub>01</sub> Business related to the federal government  
(Including military)  
 <sub>02</sub> Business related to state or local government  
 <sub>03</sub> Business that is not related to government  
 <sub>04</sub> Vacation or holiday  
 <sub>05</sub> Personal or family affairs  
 <sub>06</sub> Student or school related  
 <sub>07</sub> Other: \_\_\_\_\_

**B. ABOUT YOUR GROUND TRIP TO RONALD REAGAN WASHINGTON NATIONAL AIRPORT:**

1. Where did you start your ground trip to this airport (DCA)? (Check ONE answer)

- <sub>01</sub> Private residence  
 <sub>02</sub> Hotel/Motel  
 <sub>03</sub> Short term rental (e.g., Airbnb, VRBO)  
 <sub>04</sub> My regular place of employment  
 <sub>05</sub> Another place of business  
 <sub>06</sub> Other: \_\_\_\_\_

2. What is the address of the place you started your trip today?

Street Number	Street Name	City Quadrant (e.g., SW, NE)
---------------	-------------	------------------------------

City	State	Zip Code
------	-------	----------

Hotel/Motel or Business Name

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. How many people who came to the airport with you are on your flight?

\_\_\_\_\_ Person(s) (Including yourself)

6. How did you travel to this airport today? (Check ONE primary mode of travel)

- <sub>01</sub> Private Car
- <sub>02</sub> Rented Car
- <sub>03</sub> Taxi
- <sub>04</sub> Ride-hailing (e.g., Uber, Lyft)
- <sub>05</sub> Airport van/limo (e.g., SuperShuttle)
- <sub>06</sub> Hotel/Motel courtesy bus
- <sub>07</sub> Metrorail
- <sub>08</sub> VRE
- <sub>09</sub> Metrobus
- <sub>11</sub> Walked from place where your trip started today
- <sub>12</sub> Biked from place where your trip started today
- <sub>99</sub> Other: \_\_\_\_\_

→ If you walked or biked to the airport, please describe your trip route, including your start and end point.

\_\_\_\_\_

7. What was your MAIN reason for choosing your mode of GROUND transportation to this airport TODAY? (Check ONE answer)

- <sub>01</sub> Cost
- <sub>02</sub> Reliability
- <sub>03</sub> Travel Time
- <sub>04</sub> Convenience
- <sub>05</sub> Comfort
- <sub>99</sub> Other: \_\_\_\_\_

8. How much did you spend on all ground transportation to this airport except parking?

- <sub>01</sub> \$0
- <sub>02</sub> \$1-\$4
- <sub>03</sub> \$5-\$9
- <sub>04</sub> \$10-\$24
- <sub>05</sub> \$25-\$49
- <sub>06</sub> \$50-\$99
- <sub>07</sub> \$100 or more

9. If you arrived in a private or rented car, taxi, or ride-hailing vehicle (e.g., Uber, Lyft) did you carpool with someone else? (Skip if does not apply)

- <sub>01</sub> Yes
- <sub>02</sub> No

10. If you arrived in a private vehicle - excluding rental cars - answer below. (Skip if does not apply)

- a. Were you dropped off at the terminal curbside?
  - <sub>01</sub> Yes
  - <sub>02</sub> No
- b. Where was that vehicle parked (after drop-off)?
  - <sub>01</sub> It was not parked
  - <sub>02</sub> Short-term/hourly parking lot
  - <sub>03</sub> Long-term/daily parking garage
  - <sub>04</sub> Long-term/economy parking lot

### C. ABOUT YOUR AIRPORT CHOICE

1. Rank the three most important reasons for choosing Reagan Washington National Airport for your flight today. (Write 1 for first choice, 2 for second, etc.)

- \_\_\_\_\_ Closest airport
- \_\_\_\_\_ Easy road access
- \_\_\_\_\_ Easy access by Metrorail or public transit
- \_\_\_\_\_ Convenient van/limo or shuttle bus service
- \_\_\_\_\_ Good parking facilities
- \_\_\_\_\_ More convenient flight times
- \_\_\_\_\_ Less expensive airfare
- \_\_\_\_\_ Only airport with non-stop flights
- \_\_\_\_\_ Only airport that serves my destination
- \_\_\_\_\_ Frequent flyer / airline loyalty program
- \_\_\_\_\_ Other: \_\_\_\_\_

2. Rank the region's airports in your order of preference. (Write 1 for first choice, 2 for second, etc.)

- \_\_\_\_\_ Reagan Washington National
- \_\_\_\_\_ BWI Marshall
- \_\_\_\_\_ Washington Dulles International

### D. ABOUT YOURSELF

1. If you live locally, how many nights will you be away?

\_\_\_\_\_ Night(s) (Write '0' if you will return today)

2. If you were visiting, how many nights did you stay in the area?

\_\_\_\_\_ Night(s) (Write '0' if you arrived today)

3. What is the location of your current residence?

City/County	State	Zip Code
-------------	-------	----------

\_\_\_\_\_ Country

Turn Page →

4. How many people live in your household, including yourself?

\_\_\_\_\_ Person(s) (Write '1' if you live alone)

5. Check your age group:

- <sub>01</sub> 18 or younger      <sub>04</sub> 35–49  
<sub>02</sub> 19–24            <sub>05</sub> 50–64  
<sub>03</sub> 25–34            <sub>06</sub> 65 or older

6. What is your household's total annual income?

- <sub>01</sub> Less than \$25,000    <sub>04</sub> \$100,000–\$149,999  
<sub>02</sub> \$25,000–\$49,999    <sub>05</sub> \$150,000–\$199,999  
<sub>03</sub> \$50,000–\$99,999    <sub>06</sub> \$200,000 or more

7. How much did you spend on airport concessions during your visit? (Include expenses only within the airport terminal area such as food, souvenirs, spa visit, etc. Do not include expenses outside of the airport terminal area such as parking.)

- <sub>01</sub> \$0  
<sub>02</sub> \$1–\$24  
<sub>03</sub> \$25–\$49  
<sub>04</sub> \$50–\$99  
<sub>05</sub> \$100 or more

E. PLEASE WRITE ANY COMMENTS YOU WOULD LIKE TO SHARE

Thanks for Your Help!



**2019  
WASHINGTON – BALTIMORE  
REGIONAL AIR PASSENGER  
SURVEY**  
TO DETERMINE LOCAL AIRPORT NEEDS  
**IAD**

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.

You can take this survey online by visiting

<http://gowba.info/air>

or scan the QR code below.



ID number below is required to access online survey.

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.

ID NUMBER (PASSWORD)

**AIR PASSENGER SURVEY – IAD AIRPORT**

**A. ABOUT YOUR TRIP TODAY**

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

- <sub>01</sub> By GROUND TRANSPORTATION  
(e.g., car, taxi, ride-hailing, Metro, etc.)

If this was your selection, continue to QUESTION #2

- <sub>02</sub> I was on this flight when it arrived at this airport.

- <sub>03</sub> I made a connection at this airport from a DOMESTIC FLIGHT...

- <sub>04</sub> I made a connection at this airport from an INTERNATIONAL FLIGHT...

→ with \_\_\_\_\_ Airlines.

**STOP – That is all we need to know.**

2. What is the final destination of your trip today?

\_\_\_\_\_ City

\_\_\_\_\_ State/Province      \_\_\_\_\_ Country

3. What is the primary purpose of your trip? (Check ONE answer)

- <sub>01</sub> Business related to the federal government (Including military)  
<sub>02</sub> Business related to state or local government  
<sub>03</sub> Business that is not related to government  
<sub>04</sub> Vacation or holiday  
<sub>05</sub> Personal or family affairs  
<sub>06</sub> Student or school related  
<sub>07</sub> Other: \_\_\_\_\_

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

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

- <sub>01</sub> Private residence  
<sub>02</sub> Hotel/Motel  
<sub>03</sub> Short term rental (e.g., Airbnb, VRBO)  
<sub>04</sub> My regular place of employment  
<sub>05</sub> Another place of business  
<sub>06</sub> Other: \_\_\_\_\_

2. What is the address of the place you started your trip today?

Street Number	Street Name	City Quadrant (e.g., SW, NE)
---------------	-------------	------------------------------

City	State	Zip Code
------	-------	----------

Hotel/Motel or Business Name

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. How many people who came to the airport with you are on your flight?

\_\_\_\_\_ Person(s) (Including yourself)

6. How did you travel to this airport today? (Check ONE primary mode of travel)

- <sub>01</sub> Private Car
- <sub>02</sub> Rented Car
- <sub>03</sub> Taxi
- <sub>04</sub> Ride-hailing (e.g., Uber, Lyft)
- <sub>05</sub> Airport van/limo (e.g., SuperShuttle)
- <sub>06</sub> Hotel/Motel courtesy bus
- <sub>07</sub> Metrobus / Silver Line Express / Fairfax Connector

- <sub>11</sub> Walked from place where your trip started today
- <sub>12</sub> Biked from place where your trip started today
- <sub>08</sub> Other: \_\_\_\_\_

→ If you walked or biked to the airport, please describe your trip route, including your start and end point.

\_\_\_\_\_

7. What was your MAIN reason for choosing your mode of GROUND transportation to this airport TODAY? (Check ONE answer)

- <sub>01</sub> Cost
- <sub>02</sub> Reliability
- <sub>03</sub> Travel Time
- <sub>04</sub> Convenience
- <sub>05</sub> Comfort
- <sub>06</sub> Other: \_\_\_\_\_

8. How much did you spend on all ground transportation to this airport except parking?

- <sub>01</sub> \$0
- <sub>02</sub> \$1-\$4
- <sub>03</sub> \$5-\$9
- <sub>04</sub> \$10-\$24
- <sub>05</sub> \$25-\$49
- <sub>06</sub> \$50-\$99
- <sub>07</sub> \$100 or more

9. If you arrived in a private or rented car, taxi, or ride-hailing vehicle (e.g., Uber, Lyft) did you carpool with someone else? (Skip if does not apply)

- <sub>01</sub> Yes
- <sub>02</sub> No

10. If you arrived in a private vehicle - excluding rental cars - answer below. (Skip if does not apply)

- a. Were you dropped off at the terminal curbside?
  - <sub>01</sub> Yes
  - <sub>02</sub> No
- b. Where was that vehicle parked (after drop-off)?
  - <sub>01</sub> It was not parked
  - <sub>02</sub> Short term/hourly parking lot
  - <sub>03</sub> Long term/daily parking garage
  - <sub>04</sub> Long term/economy parking lot
  - <sub>05</sub> Valet parking

### C. ABOUT YOUR AIRPORT CHOICE

1. Rank the three most important reasons for choosing Washington Dulles International Airport for your flight today. (Write 1 for first choice, 2 for second, etc.)

- \_\_\_\_\_ Closest airport
- \_\_\_\_\_ Easy road access
- \_\_\_\_\_ Easy access by Metrorail or public transit
- \_\_\_\_\_ Convenient van/limo or shuttle bus service
- \_\_\_\_\_ Good parking facilities
- \_\_\_\_\_ More convenient flight times
- \_\_\_\_\_ Less expensive airfare
- \_\_\_\_\_ Only airport with non-stop flights
- \_\_\_\_\_ Only airport that serves my destination
- \_\_\_\_\_ Frequent flyer / airline loyalty program
- \_\_\_\_\_ Other: \_\_\_\_\_

2. Rank the region's airports in your order of preference. (Write 1 for first choice, 2 for second, etc.)

- \_\_\_\_\_ Washington Dulles International
- \_\_\_\_\_ Reagan Washington National
- \_\_\_\_\_ BWI Marshall

### D. ABOUT YOURSELF

1. If you live locally, how many nights will you be away?

\_\_\_\_\_ Night(s) (Write '0' if you will return today)

2. If you were visiting, how many nights did you stay in the area?

\_\_\_\_\_ Night(s) (Write '0' if you arrived today)

3. What is the location of your current residence?

City/County	State	Zip Code
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Turn Page →

# APPENDIX C: SURVEY PROCEDURES MANUAL





**2019 Washington-Baltimore  
Regional Air Passenger Survey**



**SURVEY PROCEDURES MANUAL**



**OCTOBER 2019**

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.

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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**

**BWI**

**B100417WN490**

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

*(Valid for Flights between October 4, 2017, and October 17, 2017)*

**LADIES AND GENTLEMEN,**

**THE PASSENGERS ON Southwest Airlines, Flight Number 490 TO Providence RI HAVE BEEN SELECTED TO PARTICIPATE IN AN AIR PASSENGER SURVEY BEING CONDUCTED IN THE WASHINGTON-BALTIMORE 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.**

**Southwest Airlines AND BWI MARSHALL AIRPORT WOULD LIKE TO THANK YOU FOR YOUR COOPERATION.”**

***WED 10/4/2017***

**2017 WASHINGTON / BALTIMORE REGIONAL AIR  
PASSENGER SURVEY FLIGHT RECORD**

SAMPLE: **B100417WN490**

AIRPORT: **BWI**                      DESTINATION CITY: **Providence RI**  
DAY: **WED**                      CARRIER: **Southwest Airlines**  
DATE: **10/4/2017**              FLIGHT #: **490**  
DEPARTURE TIME: **6:05:00 AM**  
AIRCRAFT: **73W**      NO. SEATS: **143**      OAG CODE: **WN**

**QUESTIONNAIRES:**

IN PACKET:      BEGINNING # **B00001**      ENDING # **B000143**  
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:      \_\_\_\_\_      SUCCESSFUL FLIGHT? **YES/NO**  
RESURVEY DATE #1:      \_\_\_\_\_      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.