2023 WASHINGTON-BALTIMORE REGIONAL AIR PASSENGER SURVEY

Initial Findings from the Data

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Aviation Technical Subcommittee (ATS)
January 25, 2024

National Capital Region
Transportation Planning Board

Agenda Item 3

OUTLINE

- Introduction and Survey Sections
- Passenger Characteristics
- Ground Access
- Preferences and Behavior
- Next Steps

INTRODUCTION

- The 2023 Washington-Baltimore Regional Air Passenger Survey was conducted during the entire month of October 2023 at Dulles International Airport (IAD), Reagan National Airport (DCA), and Baltimore/Washington International Thurgood Marshall Airport (BWI).
- Due to methodological changes from previous surveys, a pretest was conducted at Dulles International Airport (IAD) in April 2023.
- There were a total of 486 flights surveyed and 9,755 completed surveys for all three airports.

AIRPORT	FLIGHTS SAMPLED	FLIGHTS SURVEYED	SURVEYS COMPLETED
BWI	171	149	3,355
DCA	223	185	2,751
IAD	169	152	3,649
TOTAL	563	**486**	**9,755**

SURVEY SECTIONS

- AIRLINE AND FLIGHT
- ABOUT YOUR TRIP TODAY
- ABOUT YOUR GROUND TRIP TO THE AIRPORT
- ABOUT YOUR AIRPORT CHOICE
- ABOUT YOURSELF
- YOUR EXPERIENCE AT THE AIRPORT
- RAFFLE

REQUIRED SURVEY QUESTIONS

- What airline are you taking today?
- What is the flight number?
- How did you get to the airport (BWI/DCA/IAD) for this trip?
- INCLUDING YOURSELF, how many people who came to the airport with you are on your flight today?
- What was your primary mode of travel to this airport today?

SURVEY QUESTIONNAIRE

- Survey questionnaires were reviewed from previous air passenger surveys to determine which questions to keep, drop, or add.
- To ensure consistency and to allow for future longitudinal comparisons, the questions asked remained mostly the same except for a question about ground transportation expenses which was dropped in the 2023 survey.
- The 2023 survey included a participation incentive, so there were additional questions requesting participants to provide contact information to enter the raffle drawing for a gift card.

NEW QUESTIONS FOR THE 2023 SURVEY

• Did you plug into an Electric Vehicle (EV) charging station?	• Before the COVID-19 pandemic (i.e., before March 2020)? • Now and in the future? • Why has your mode of travel changed?	• Which TSA security lane did you use? • Where did you check your baggage? • Where did you obtain your boarding pass for your flight?
NEW TECHNOLOGIES		
• Raffle Section		
INCREASE PARTICIPATION	TRAVEL BEHAVIOR PRE-POST PANDEMIC	PASSENGER CHECK-IN AND SECURITY PROCEDURES

PASSENGER CHARACTERISTICS

MAIN QUESTIONS

Select your age group

- Under 18 years
- 18 – 24 years old
- 25 – 34 years old
- 35 – 44 years old
- 45 – 54 years old
- 55 – 64 years old
- 65 years or older

What is the primary purpose of your trip?

- Business related to the federal government (including military)
- Business related to state or local government
- Business that is not related to government
- Leisure, vacation, or holiday
- Personal or family affairs
- Student or school related
- Other

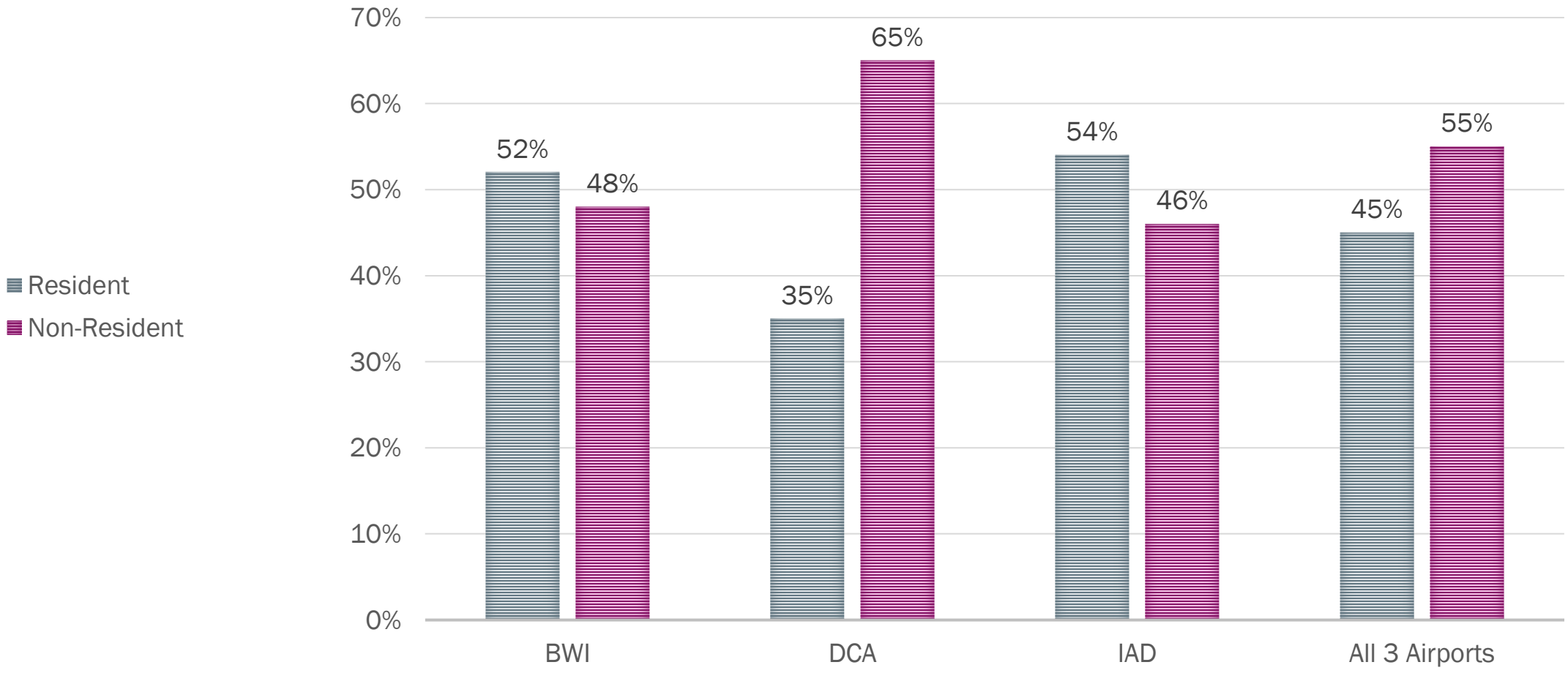
What is your household's total annual income?

- Less than $25,000
- $25,000--$49,999
- $50,000--$99,999
- $100,000--$149,999
- $150,000--$199,999
- $200,000 or more

Are you visiting the local area or do you live here?

- Visiting the Washington-Baltimore area
- Live in the Washington-Baltimore area

RESIDENT STATUS



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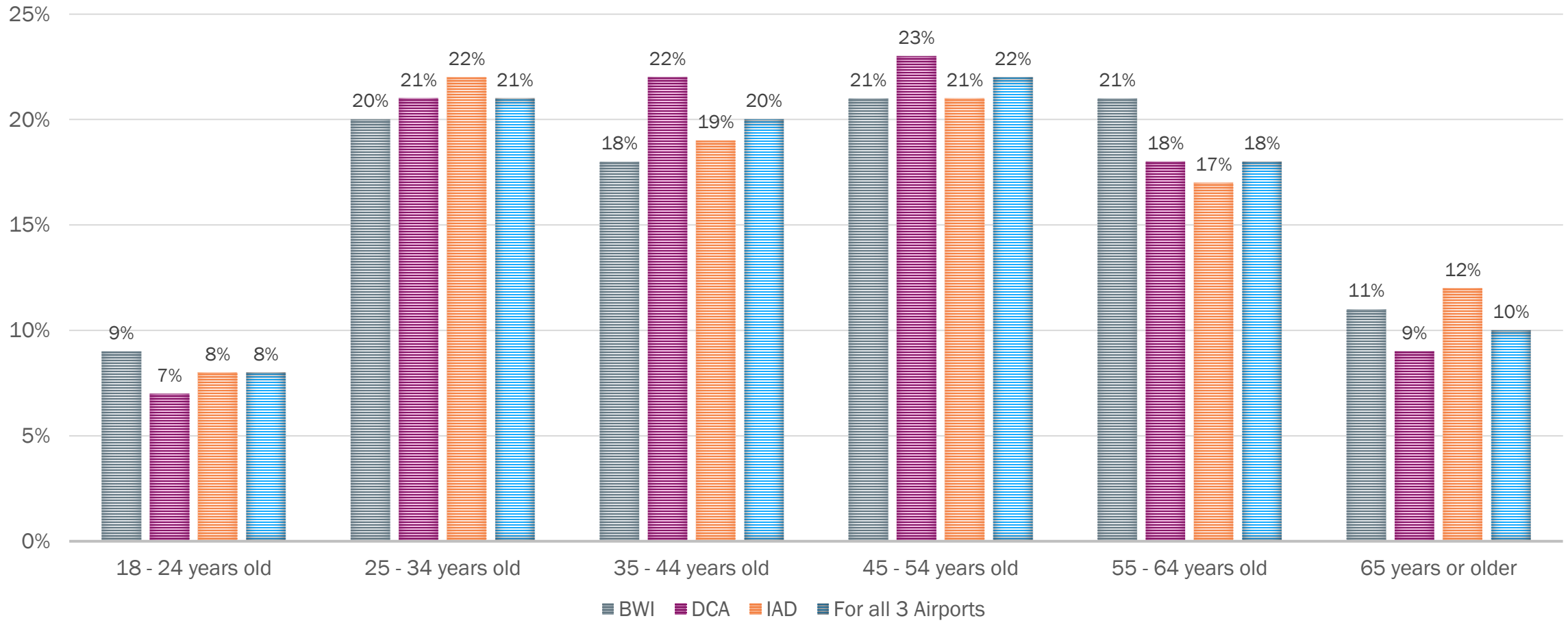
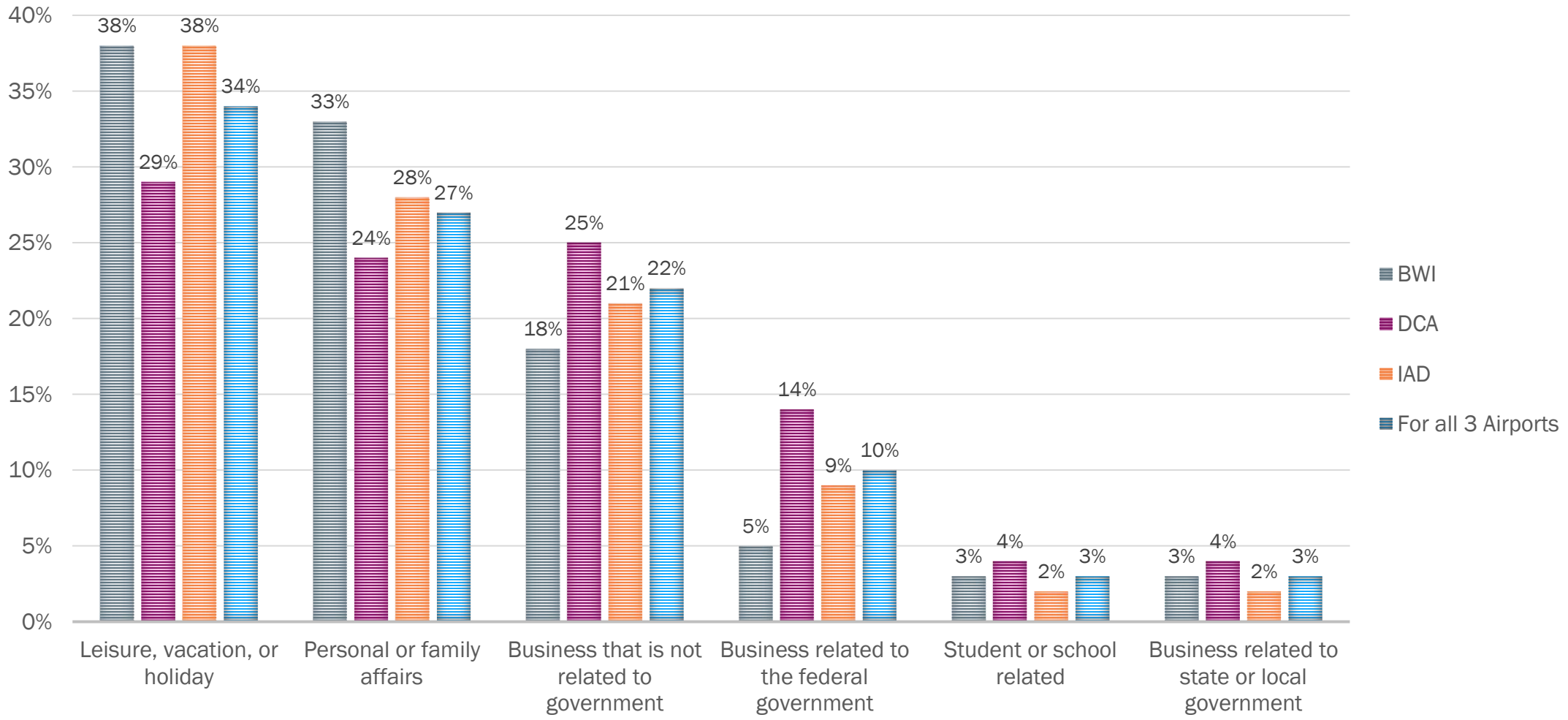
AGE DISTRIBUTION



TRIP PURPOSE



TRIP PURPOSE

For all 3 airports, leisure (vacation or holiday), business (not government), and personal/family affairs are the primary reasons for traveling.

BWI:
- Leisure (38%)
- Personal/family affairs (33%)
- Business (Not government) (18%)

DCA:
- Leisure (29%)
- Business (Not government) (25%)
- Personal/family affairs (24%)

IAD:
- Leisure (38%)
- Personal/family affairs (28%)
- Business (Not government) (21%)

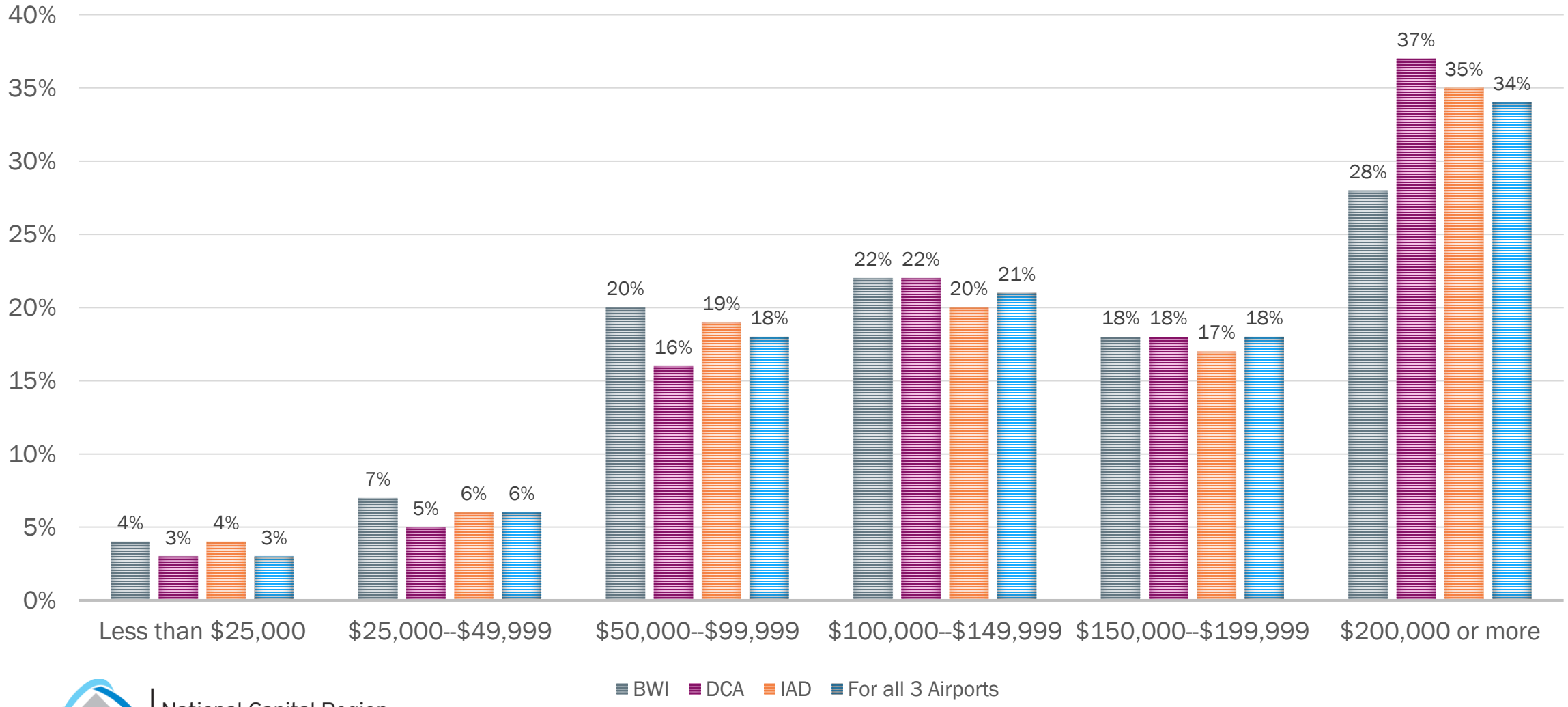
Resident status for the 3 main trip purposes (all 3 airports):

Leisure (37% of passengers):
- 53% **Resident**
- 47% Non-residents

Personal/Family affairs (27% of passengers):
- 54% **Resident**
- 46% Non-residents

Business, not government (21% of passengers):
- 60% **Resident**
- 40% Non-residents

HOUSEHOLD INCOME



GROUND ACCESS

MAIN QUESTIONS

How did you get to the airport (BWI/DCA/IAD) for this trip?

- By GROUND TRANSPORTATION
- I was on this flight when it arrived at this airport
- I made a connection at this airport from a DOMESTIC FLIGHT
- I made a connection at this airport from an INTERNATIONAL FLIGHT

What is the approximate location of the place you started your ground trip to this airport?

- My home
- Someone else's home
- Hotel/Motel
- Short term rental
- My regular place of employment
- Another place of business
- Other

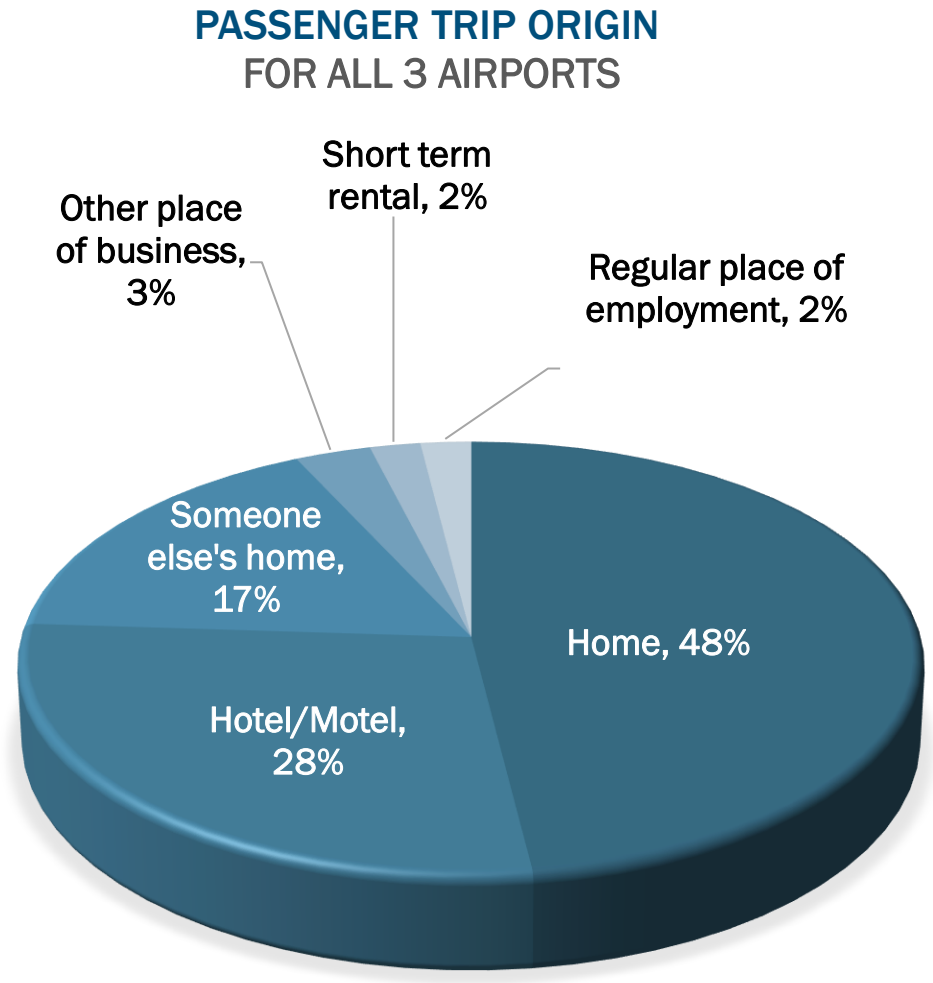
How many people live in your household, including yourself?

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8 or more

PASSENGER TRIP ORIGIN

	BWI	DCA	IAD	For all 3 Airports
Home	58%	36%	56%	48%
Hotel/Motel	18%	40%	20%	28%
Someone else's home	19%	15%	18%	17%
Other place of business	1%	5%	2%	3%
Short term rental	2%	2%	3%	2%
Regular place of employment	1%	3%	1%	2%

Note: Cells highlighted for emphasis

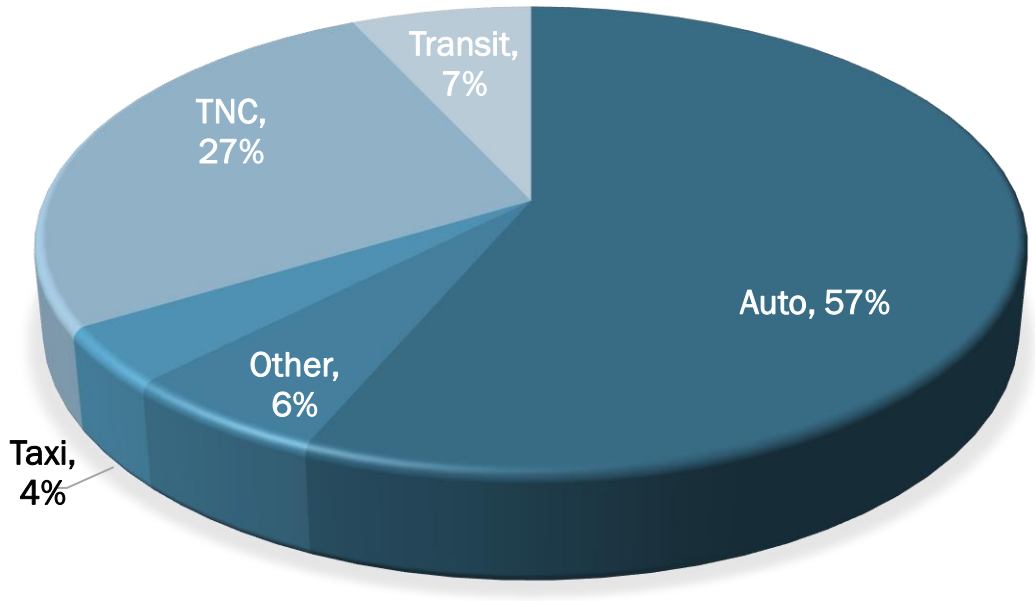


PASSENGER MODE ACCESS

	BWI	DCA	IAD	For all 3 Airports
Auto	**70%**	39%	**57%**	57%
TNC	20%	**39%**	25%	27%
Transit	3%	**13%**	7%	7%
Taxi	1%	6%	5%	4%
Other	6%	4%	6%	6%

Note: Cells highlighted for emphasis

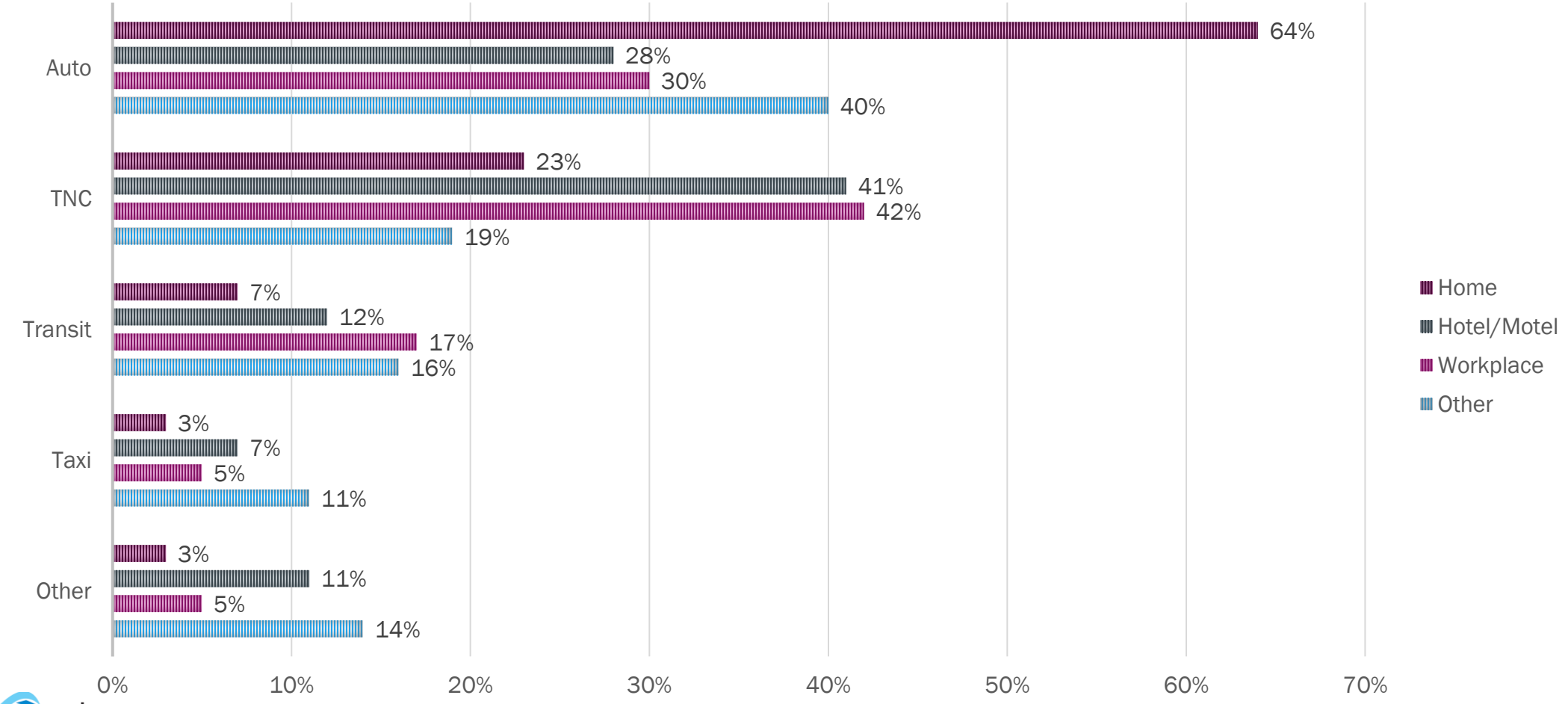
PASSENGER MODE ACCESS
FOR ALL 3 AIRPORTS



TNC: Transportation Network Companies

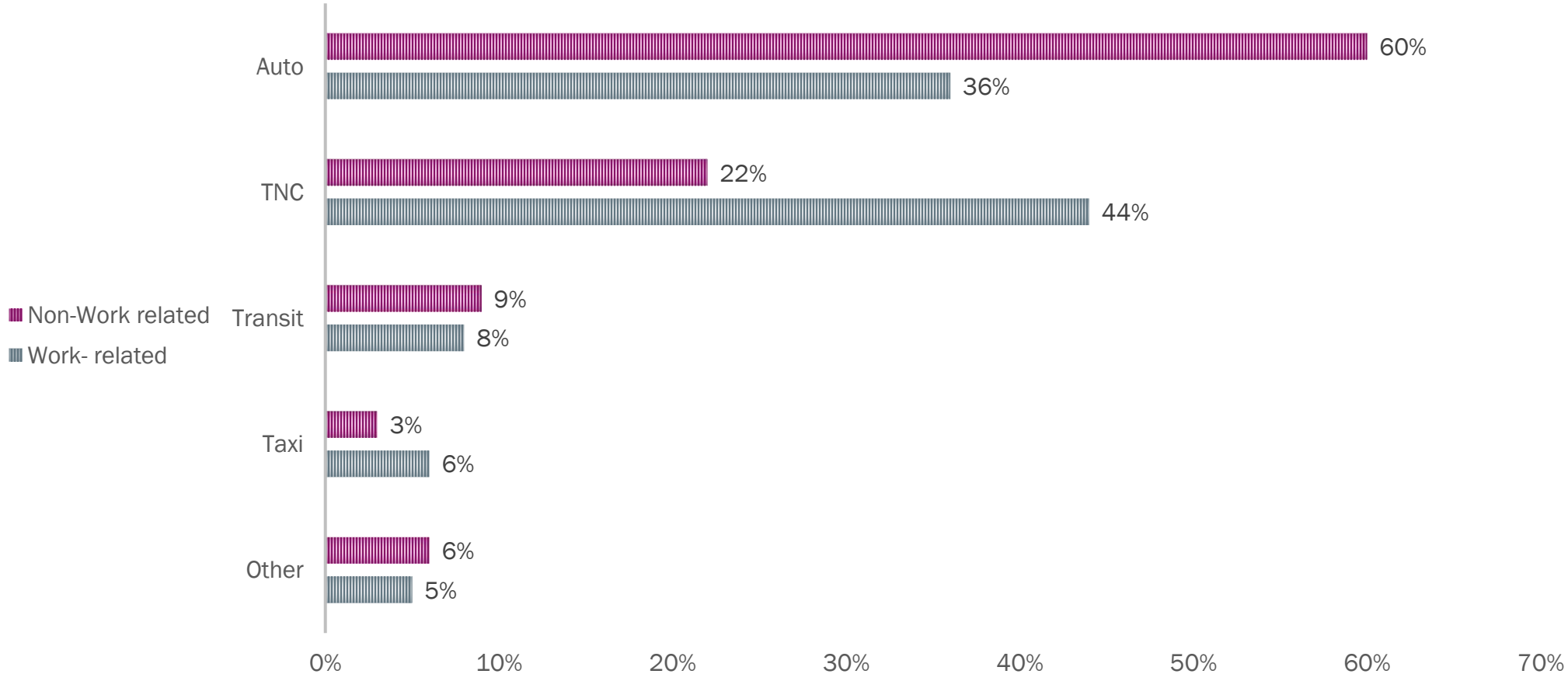
PASSENGER MODE ACCESS – ALL AIRPORTS

MODE ACCESS/TRIP ORIGIN

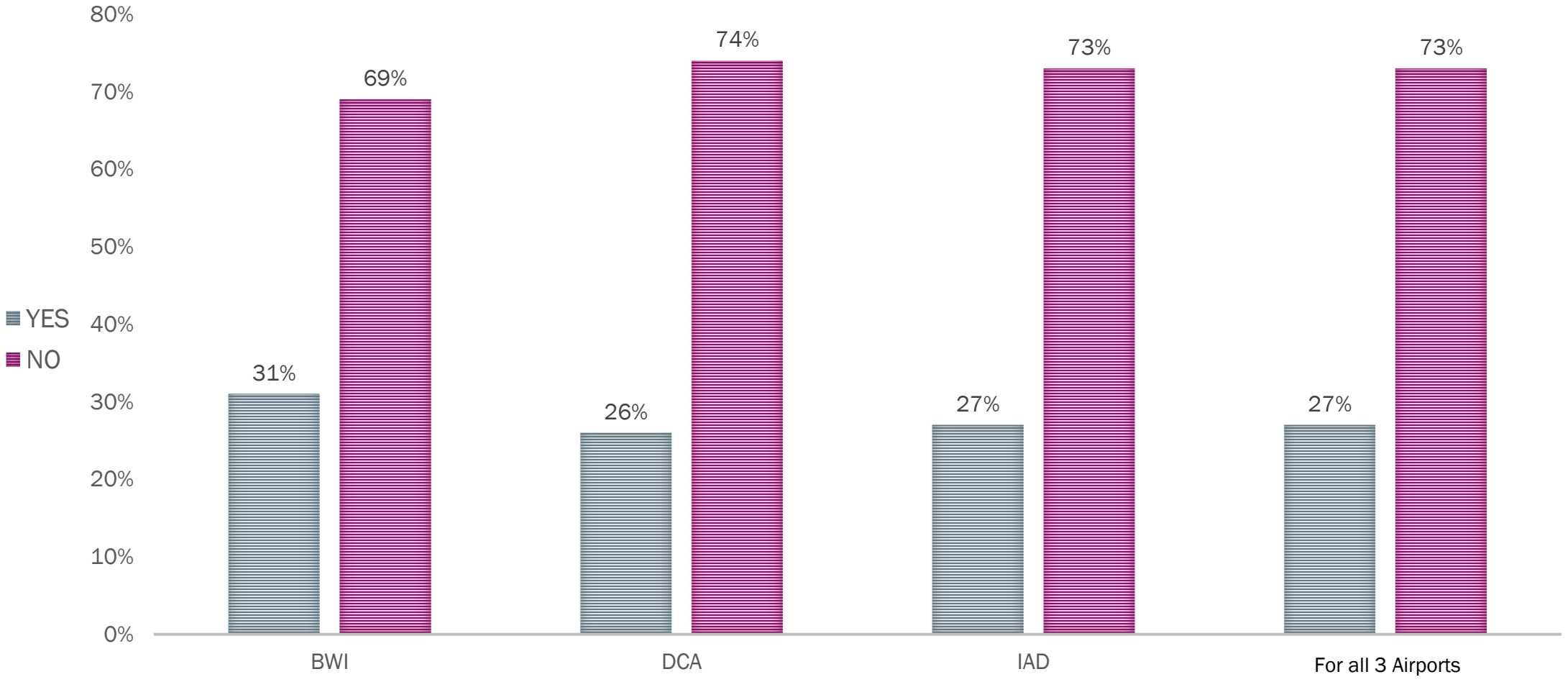


PASSENGER MODE ACCESS – ALL AIRPORTS

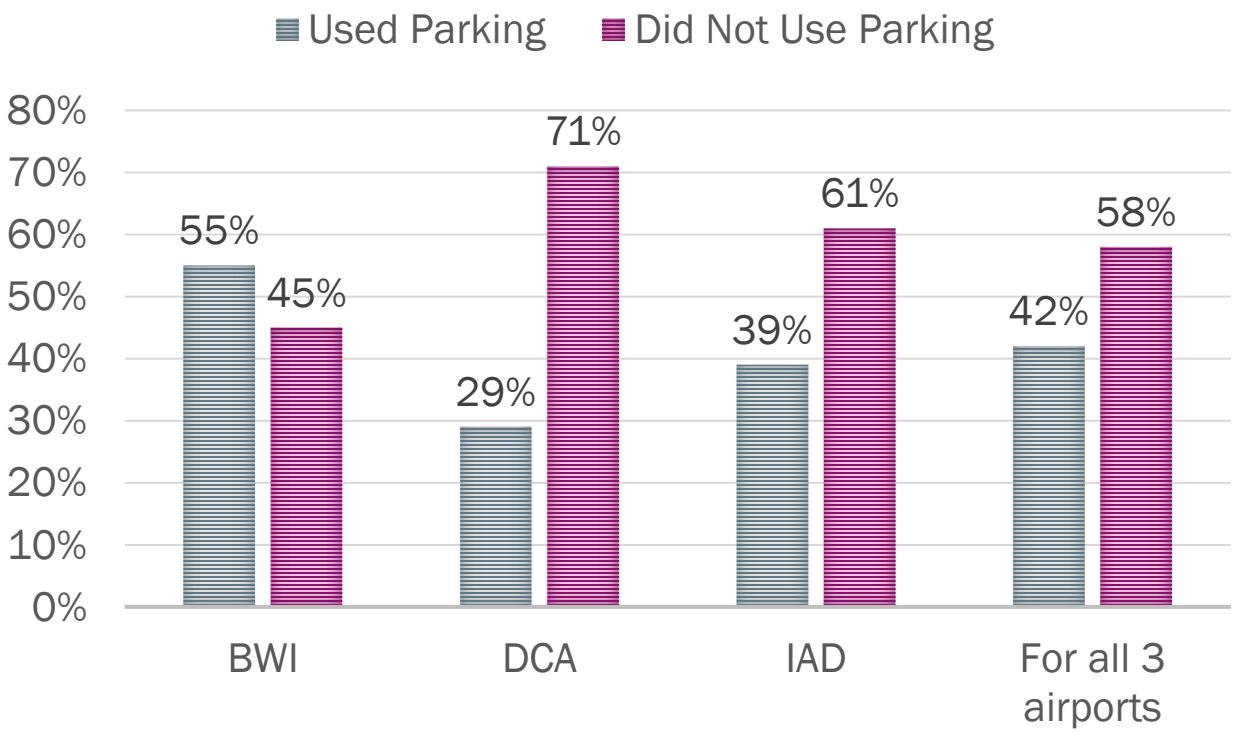
MODE ACCESS/WORK AND NON-WORK RELATED



CARPOOLING


80%
70%
60%
50%
40%
30%
20%
10%
0%
YES
NO
31%
69%
26%
74%
27%
73%
27%
73%
BWI
DCA
IAD
For all 3 Airports

PARKING



58% of air passengers in all 3 airports **did not park**:

- → BWI: 45%
- → DCA: 71%
- → IAD: 61%

Parking facilities most used by air passengers by airport:

BWI
15% Daily
15% Long-term A/B

DCA
11% Long-term/Daily
9% Short-term Hour
4% Long-term Econ

IAD
13% Long-term/Daily
12% Long-term Econ
10% Short-term Hour

PREFERENCES AND BEHAVIOR

MAIN QUESTIONS

Rank the region's airports in your order of preference.

- Washington Dulles International (IAD)
- Reagan Washington National (DCA)
- Baltimore/Washington International Marshall (BWI)

Rank the three most important reasons for choosing this airport for your flight today.

- Closest airport
- Easy road access
- 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

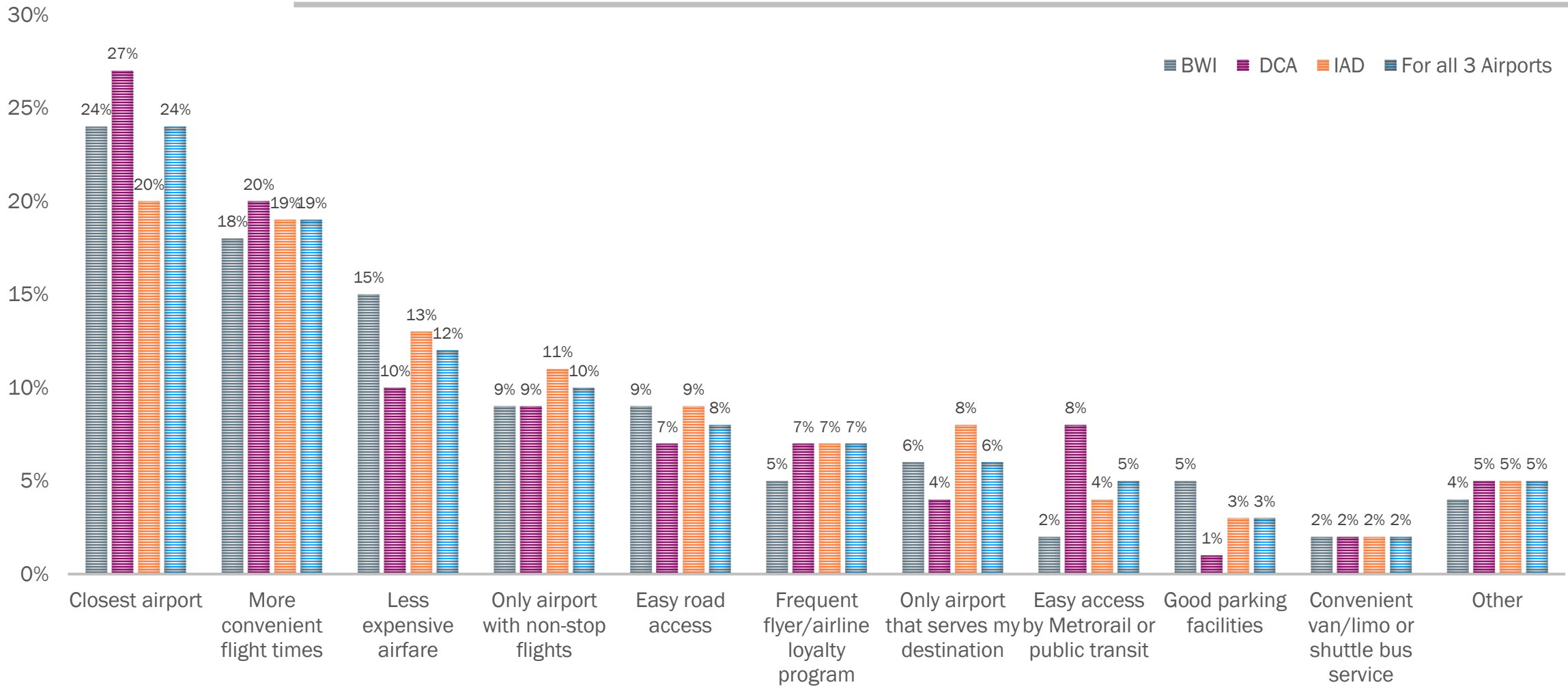
Describe your typical mode of travel to this airport:

Before the COVID-19 pandemic (i.e., before March 2020)?

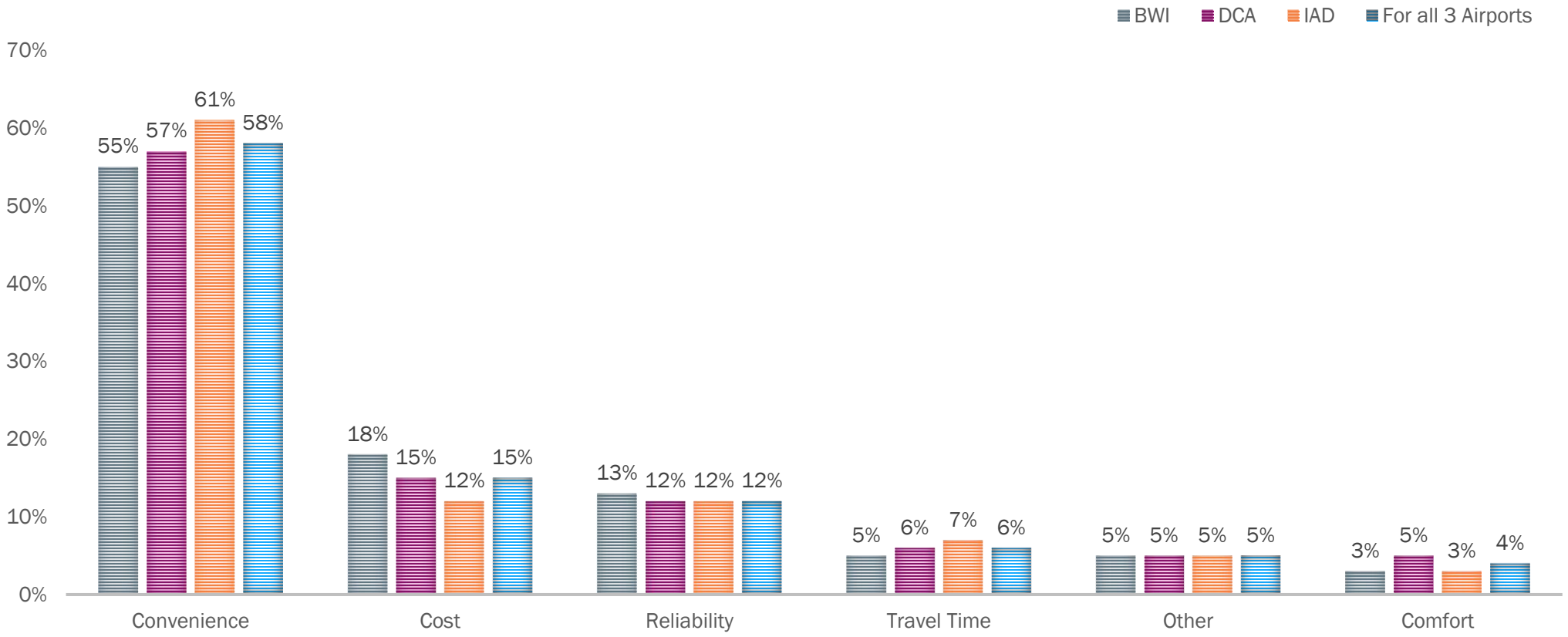
Now and in the future?

- Drive by yourself or with a family member, friend, etc.
- Taxi or ride-hail (e.g., Uber, Lyft)
- Public transit
- Other

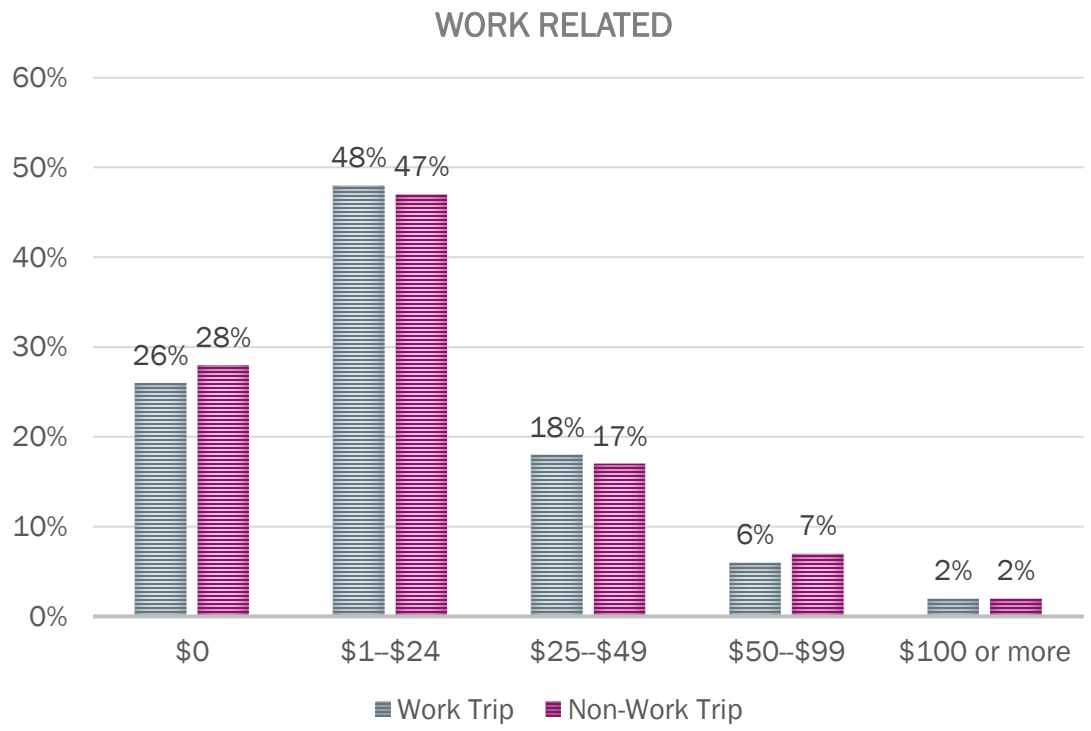
REASON FOR CHOOSING AN AIRPORT



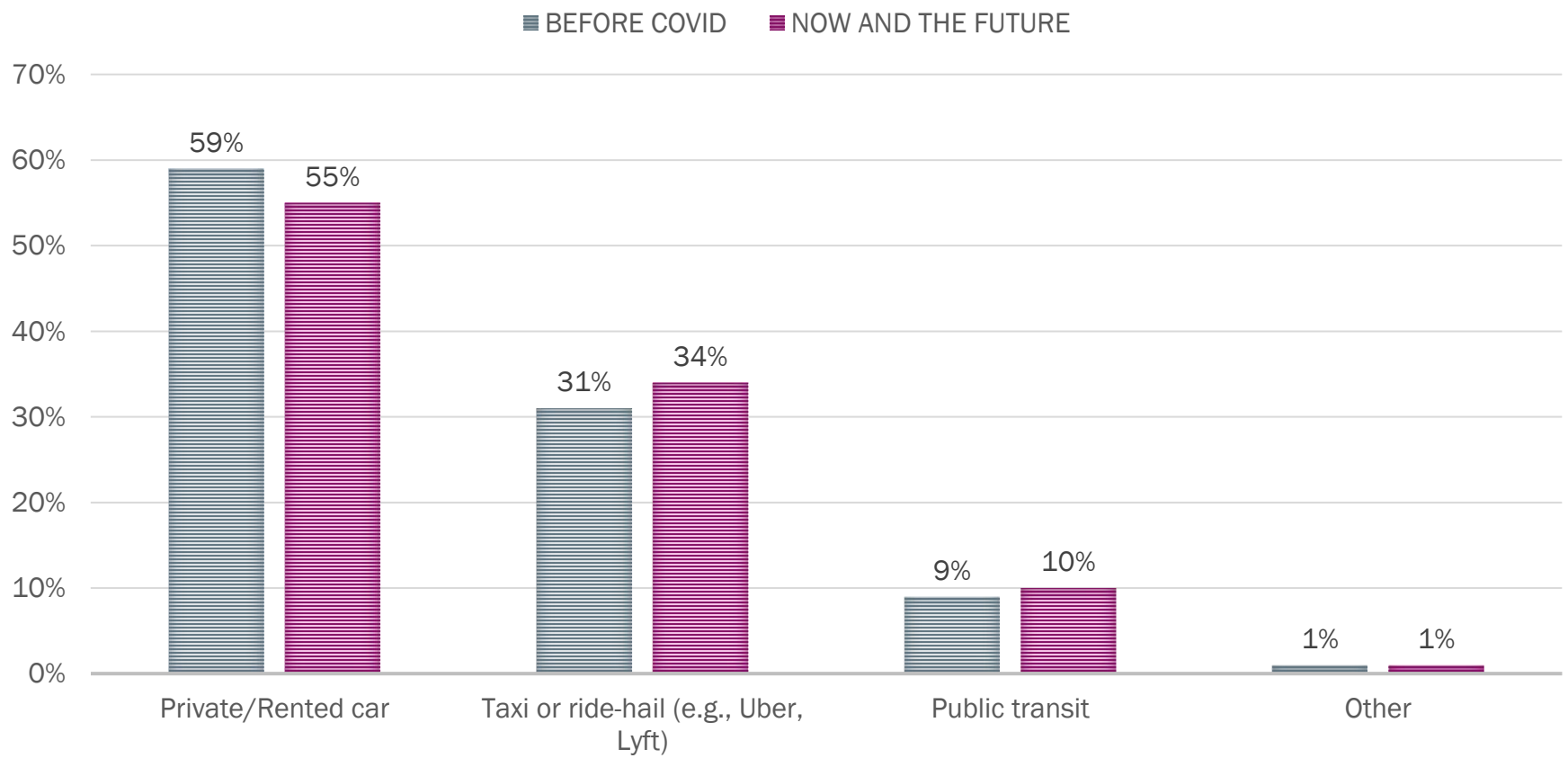
REASON FOR CHOOSING MODE OF TRANSPORT



AIRPORT SPENDING – ALL AIRPORTS

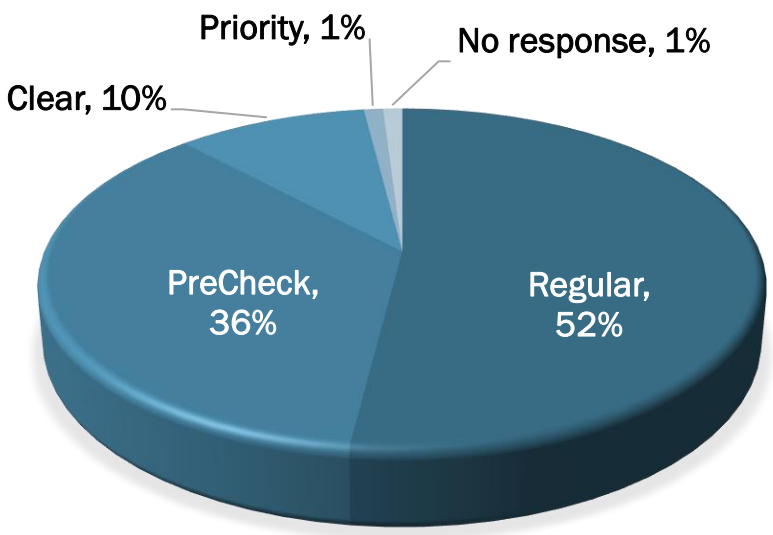


PRE/POST PANDEMIC TRAVEL BEHAVIOR – ALL AIRPORTS

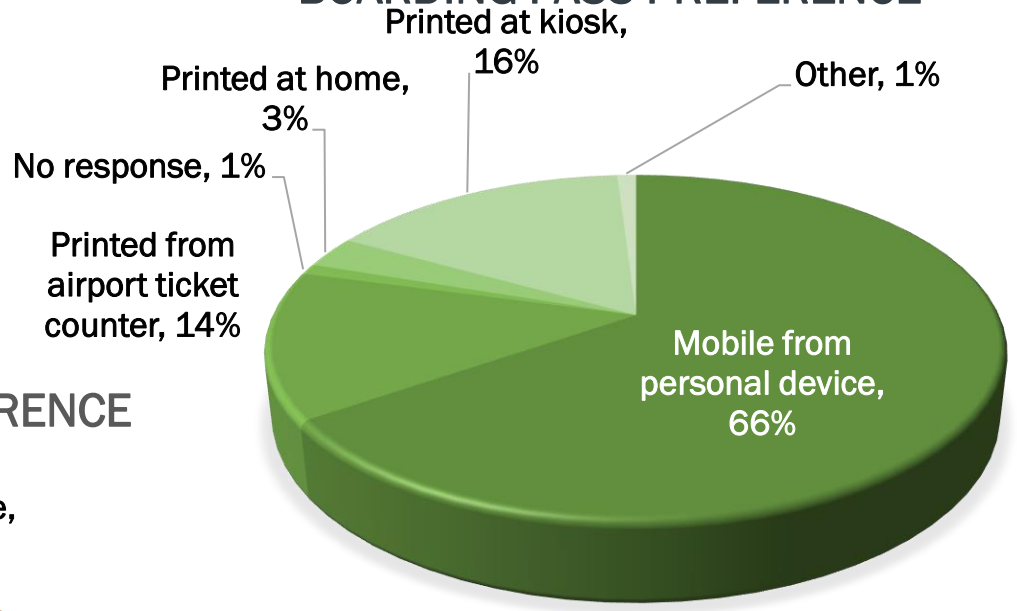


CHECK-IN AND SECURITY PROCEDURES–ALL AIRPORTS

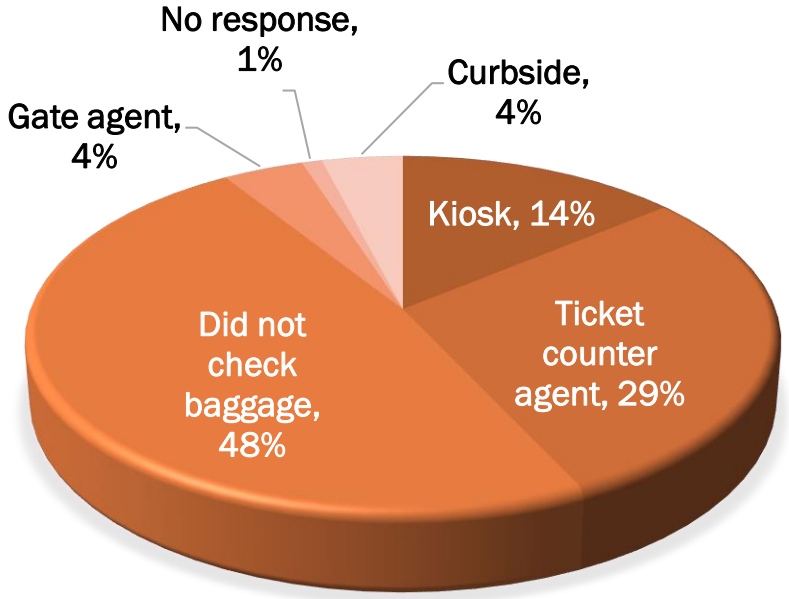
TSA PREFERENCE



BOARDING PASS PREFERENCE



BAGGAGE CHECK PREFERENCE



NEXT STEPS

- Further data editing and recoding of open response variables
- Develop and apply weighting factors based on flight strata
- Factor the survey responses to represent annual passenger estimates
- Develop tabulations that will be included in the General Findings Report

ACKNOWLEDGEMENTS

- **COG/TPB staff**
  - Zhuo Yang, Transportation Data Analyst
  - Suraj Vujjini, Transportation Data Analyst
  - Tim Canan, Program Director, Planning Data and Research
- **Metropolitan Washington Airports Authority (MWAA)**
  - Glen Warren, Airport-Landside Planner
  - Danielle Morgan, Executive Staff Coordinator
  - Lori K. Labell, Manager, Landside and Airside Contracts
- **Maryland Aviation Administration (MAA)**
  - Shawn Ames, Deputy Director
  - Mark Williams, Manager, Environmental Compliance

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