

ITEM 8 – Information
September 18, 2024

2023 Washington-Baltimore Regional Air Passenger Survey:
General findings

Background: The Board will be briefed on the general findings from the 2023 Washington-Baltimore Regional Air Passenger Survey. Discussion will focus on longitudinal trends from previous surveys, including passenger characteristics, airport ground access trends, and preferences and behavior of surveyed air passengers.



MEMORANDUM

TO: Transportation Planning Board
FROM: Timothy Canan, TPB Planning Data and Research Director
SUBJECT: 2023 Washington-Baltimore Regional Air Passenger Survey
DATE: September 12, 2024

In October 2023, the National Capital Region Transportation Planning Board (TPB), as part of its Continuous Airport System Planning (CASP) Program, 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). Field staff collected survey responses from 18,310 out of a total of 54,265 enplaning passengers; after data processing, 9,599 valid survey responses from 486 randomly selected flights (417 domestic and 69 international) were analyzed for the general findings of the 2023 air passenger survey.

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 2023 APS was the fifteenth 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 with the exception of 2021, due to the COVID-19 pandemic. 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 TPB's travel demand model. TPB staff will brief the Board on the general findings of the 2023 air passenger survey at its September 18, 2024 meeting.

CASP PROGRAM

The CASP program was established in 1975 when the first grant application was approved by the Federal Aviation Administration (FAA). The goal of the CASP program is to provide a process that supports the planning, development, and operation of airport facilities and the transportation facilities that serve the airports in a systematic framework for the Washington-Baltimore region. The airport system planning process consists of a continuous cycle that begins with a regional air passenger survey. This survey is followed by forecasts of future air passenger travel and the ground travel of these air passengers to and from the region's three commercial airports. These forecasts in turn lead to the development of a revised ground access plan for the region.

The CASP program is funded principally by the Federal Aviation Administration (FAA) through grants from its Airport Improvement Program (AIP). These grants provide an opportunity for the region to

consider and plan for the ground access needs of the region's airports through a systematic framework. The scope of these grants is limited to air systems planning studies and considerations. MAA and MWAA provide additional funding every other year to fund the data collection activities of the biennial air passenger survey. These activities are not covered by the scope of FAA AIP grants.

The CASP program is developed, implemented, and monitored with the assistance of the Aviation Technical Subcommittee of the TPB's Technical Committee. The Subcommittee is responsible for coordinating airport system planning with the regional transportation planning process. The region's three major commercial airports are represented on the TPB by the Maryland Aviation Administration (MAA) and the Metropolitan Washington Airports Authority (MWAA). Although the TPB is the designated metropolitan planning organization (MPO) for the Washington metropolitan area, the air systems planning region consists of both the Washington metropolitan area as well as the Baltimore metropolitan area. As a result, TPB, through its Aviation Technical Subcommittee, coordinates its air systems planning process very closely with the Baltimore Metropolitan Council's Baltimore Regional Transportation Board, the designated MPO for the Baltimore metropolitan area.