

# WASHINGTON-BALTIMORE REGIONAL AIR PASSENGER SURVEY 2019

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## General Findings Report

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May 1, 2020

# OVERVIEW

- Key Takeaways
- Passenger Characteristics
- Ground Access
- Preferences & Behavior
- Next Steps



# Survey Instrument New Additions

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**Question B1 – New Origin Option: Short-term Rental (Airbnb, VRBO)**

**Question B6 – New Mode Options: Biking and Walking**

**Question B8 – Ground Transportation Spending**

How much air passengers spend on ground access to airport

**Question B9 – Carpooling**

If air passengers carpoled to the airport

**Question C2 – Airport Ranking**

Participants rank their preference for each airport (1-3)

**Question D7 – Airport Concessions**

How much air passengers spend on concessions (non-parking spending) at the airport; Replaced APS 2017 question about total spending in region



# KEY TAKEAWAYS

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# Key Takeaways

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**Response Rate:** 28.6%

**Enplanement:** Local originating enplanements increased at all airports

## **Dominant Travel Purpose by Airport**

- BWI: Personal and Vacation
- DCA: Business – Government and Other
- IAD: School-related

**Ground Access Spending:** TNCs are the dominant mode for \$10-\$99

**Airport Spending:** Most air passengers spend \$1-\$24 at the airport



# Enplanement by Type and Airport

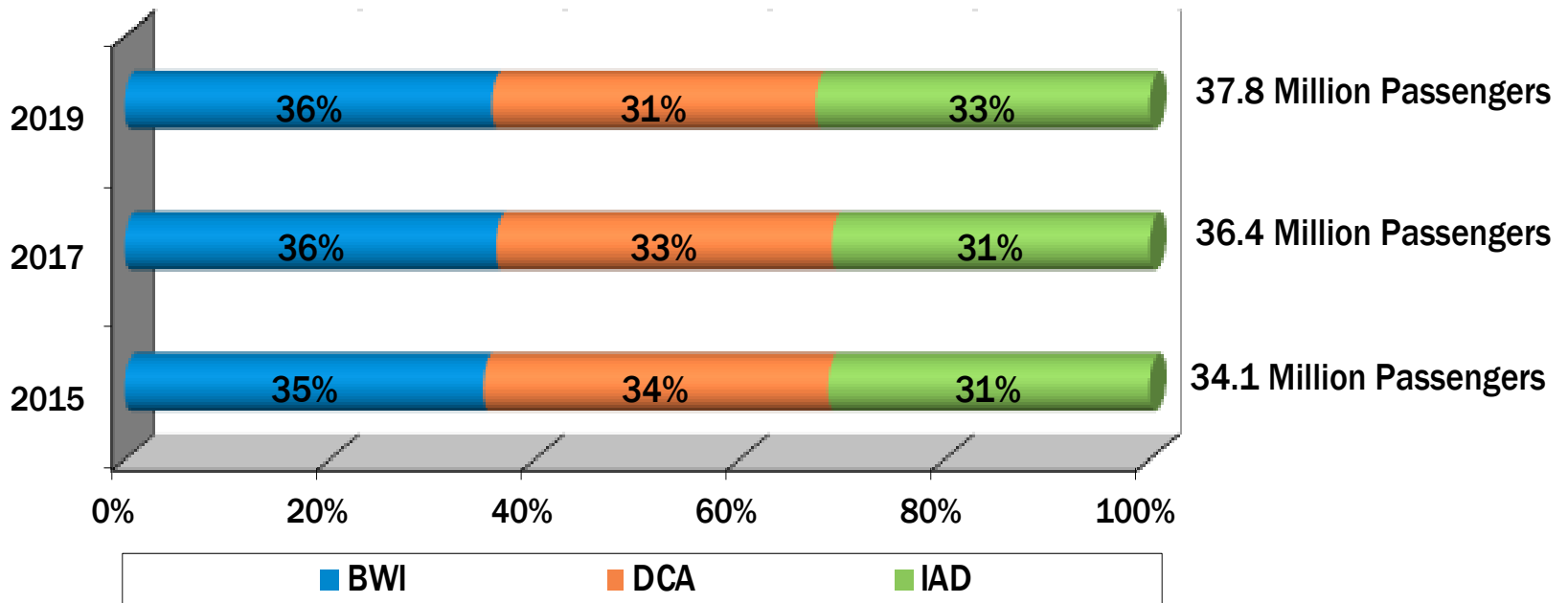
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- Annual air passenger enplanements increased by 1.3 million to 37.8 million in 2019, compared to 36.5 million in 2017
- Local originations increased at all three airports. Overall, they increased from 73% to 80% of total enplanements.
  - BWI: +17%
  - DCA: +4%
  - IAD: +20%
- Connections decreased at all airports (compared with 2017)
  - BWI: -28%
  - DCA: -29%
  - IAD: +-11%



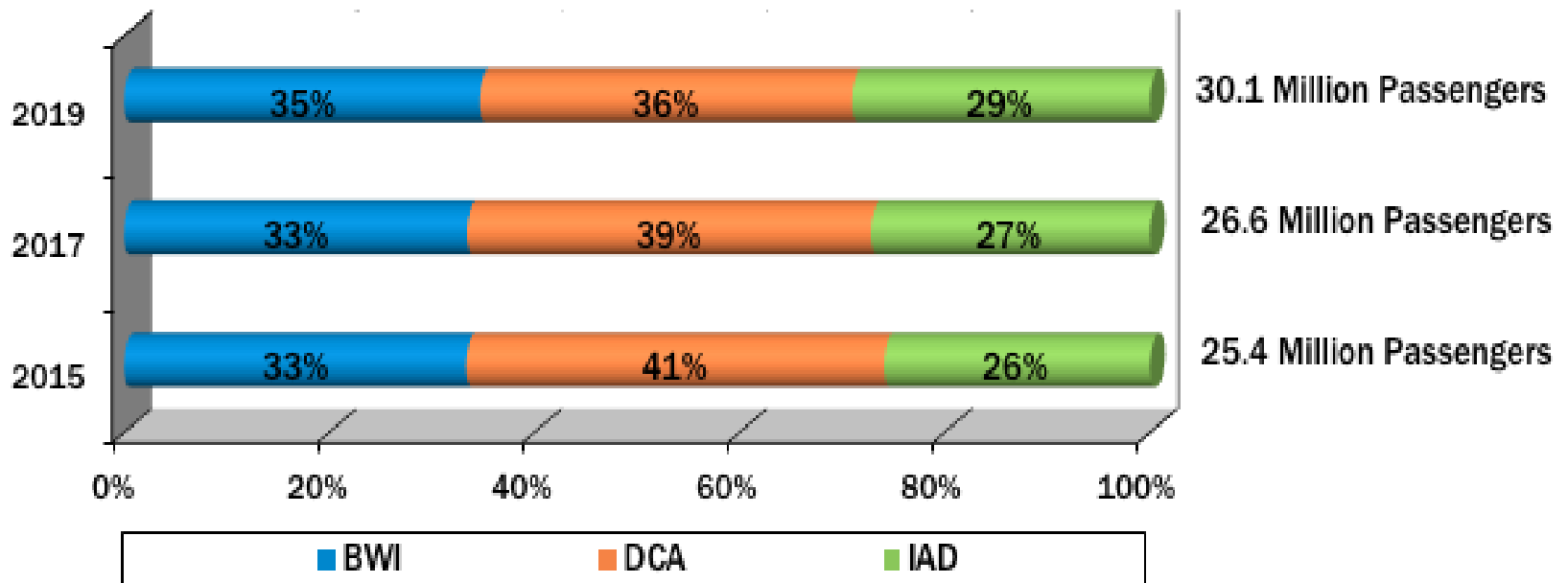
# Enplanement Share by Airport: Total

- BWI total enplanement share remained the same as 2017
- DCA total enplanement share decreased by 2%
- IAD total enplanement share increased by 2%



# Enplanement Share: Local Originations

- BWI local originating enplanement share increased by 2%
- DCA local originating enplanement share decreased by 3%
- IAD local originating enplanement share increased by 2%





# PASSENGER CHARACTERISTICS

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# Air Traveler Characteristics

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- Most air travelers were middle-aged, affluent and non-resident
- Non-residents accounted for 59% of total departing air passengers
- Dominant Travel Purpose by Airport
  - BWI: Personal and Vacation
  - DCA: Business – Government and Other
  - IAD: School-related
- 35% of overall air passengers traveled for business
- 26% of air passengers have a household income of \$200K+



# Annual Originating Air Passengers by Resident Status

Residents account for 59% of air passengers; a 1% decrease from 2017

- BWI: 58% → 54%
- DCA 66% (no change)
- IAD: 51% → 55%

Resident Status	BWI		DCA		IAD		Region	
	2017	2019	2017	2019	2017	2019	2017	2019
Resident Number	3,043	3,202	2,842	2,586	2,247	2,297	8,132	8,085
Percent	42%	46%	34%	34%	49%	45%	40%	41%
Non-Res Number	4,213	3,733	5,480	5,089	2,327	2,761	12,020	11,583
Percent	58%	54%	66%	66%	51%	55%	60%	59%
<b>TOTAL</b> Number	<b>7,256</b>	<b>6,935</b>	<b>8,322</b>	<b>7,675</b>	<b>4,574</b>	<b>5,058</b>	<b>20,152</b>	<b>19,668</b>
Percent	100%	100%	100%	100%	100%	100%	100%	100%



# Trip Purpose

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## Dominant Trip Purpose By Airport

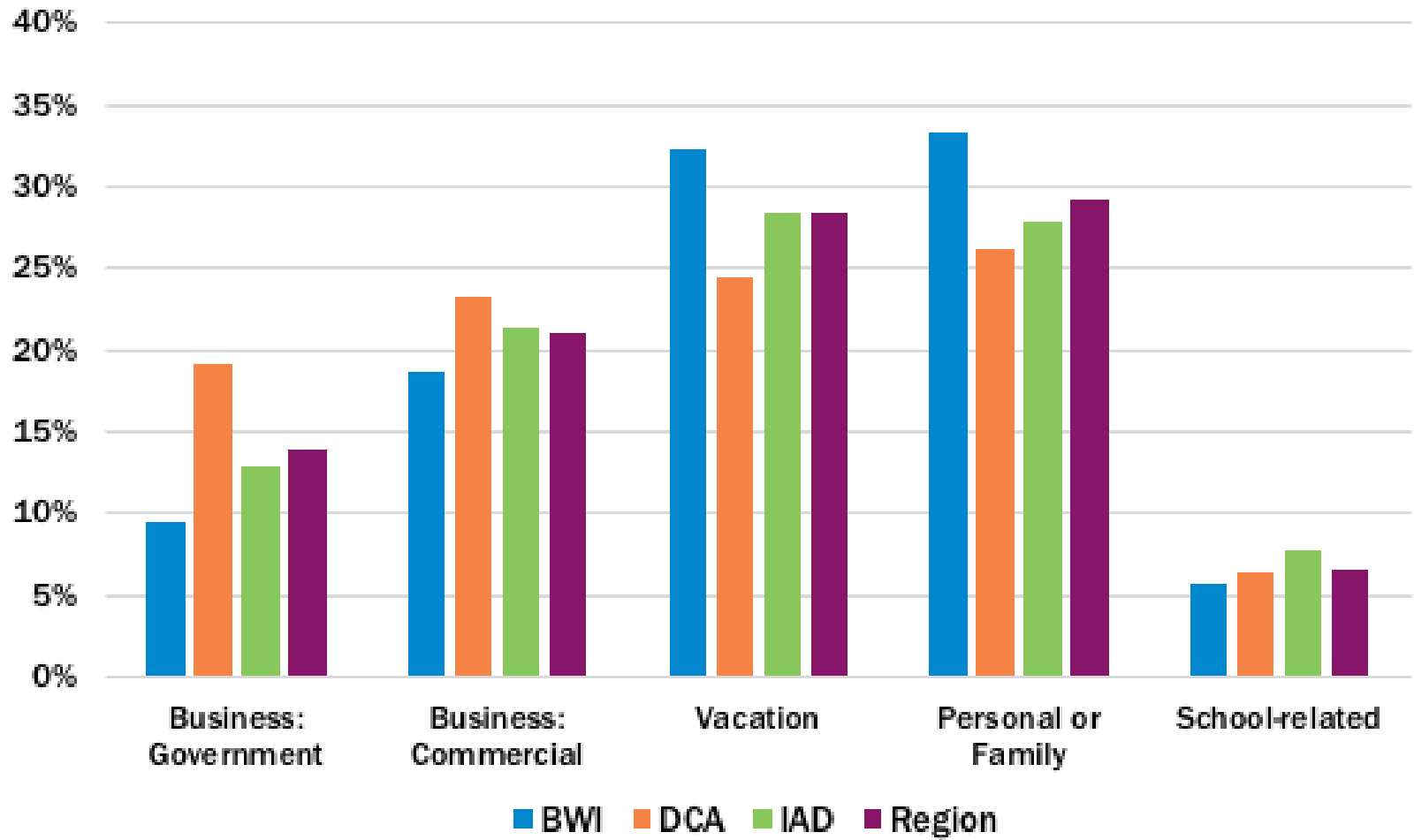
- **BWI:** Personal and Vacation
- **DCA:** Business – Government and Other
- **IAD:** School-related

## Resident Status

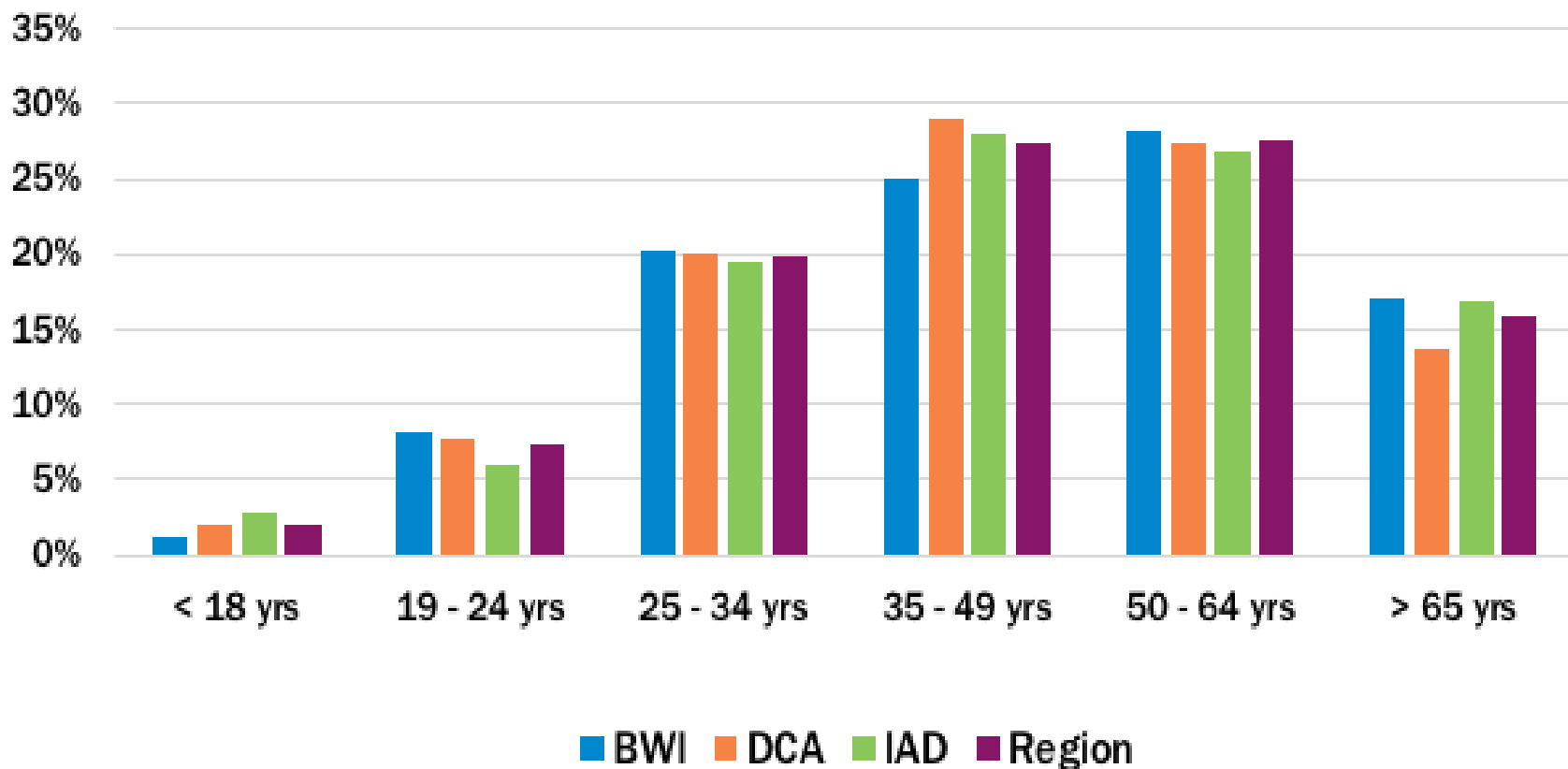
- **Business:** 35% of air passengers overall – 31% resident, 40% non-resident, and 32% resident status unknown
- **Personal:** 29% of air passengers overall – 32% resident, 27% non-resident, and 30% resident status unknown
- **Vacation:** 28% of air passengers overall – 32% resident, 26% non-resident, and 28% resident status unknown



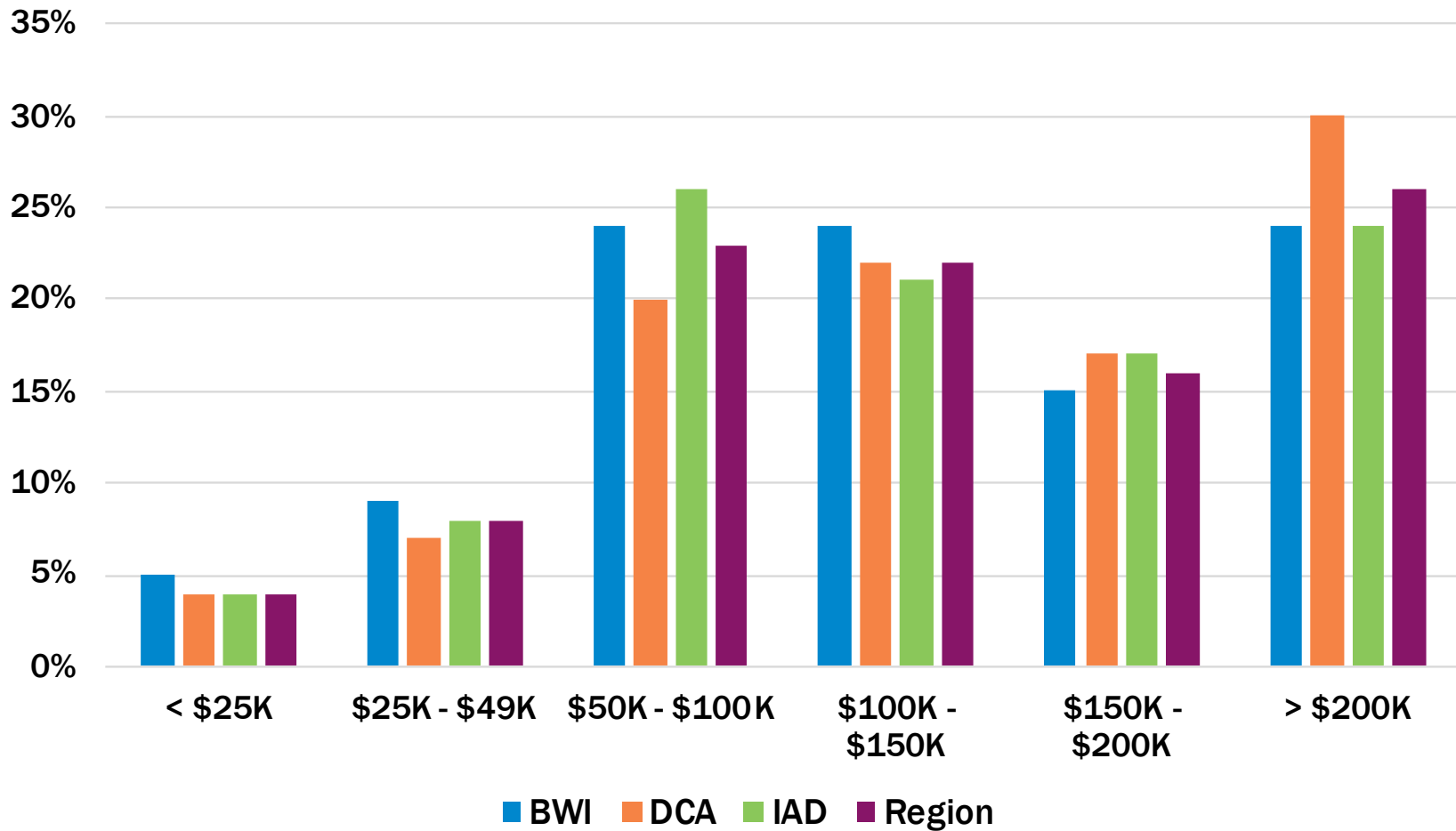
# Trip Purpose



# Age Distribution



# Household Income



# GROUND ACCESS

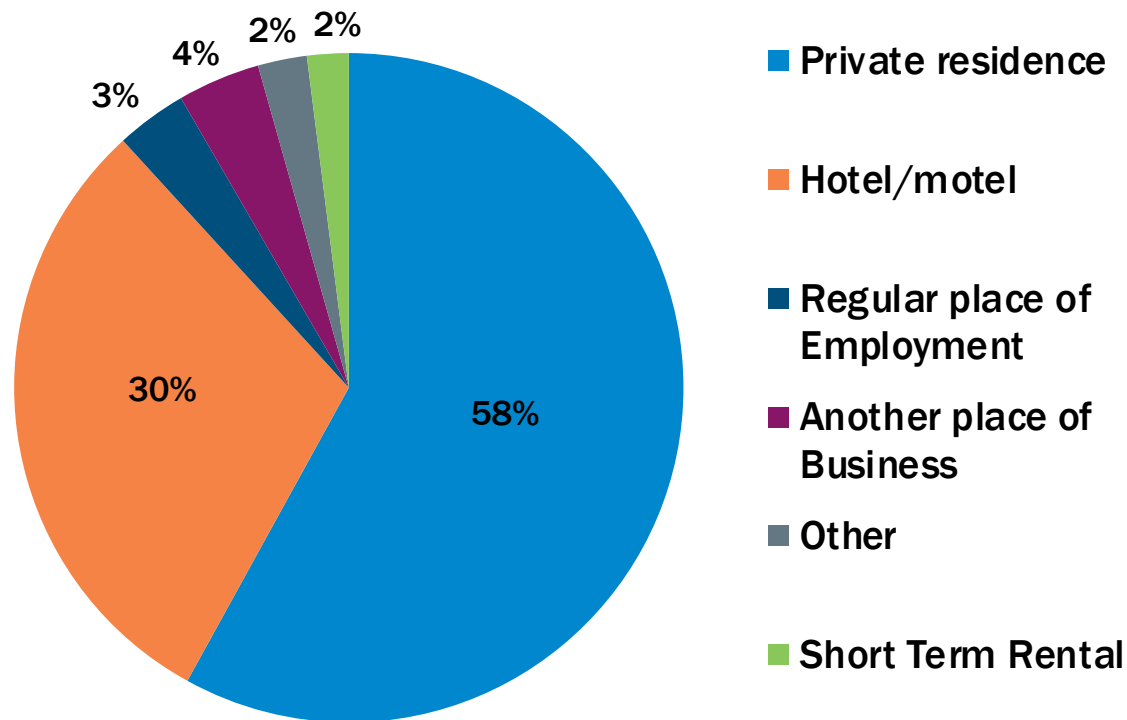
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# Local Air Passenger Trip Origin

- Short-term rental made up 2% of origins at each airport
- Private residence decreased by 2%: 5% BWI, 4% DCA, IAD unchanged
- Hotel/motel increased by 2%: 2% DCA and IAD; 4% BWI

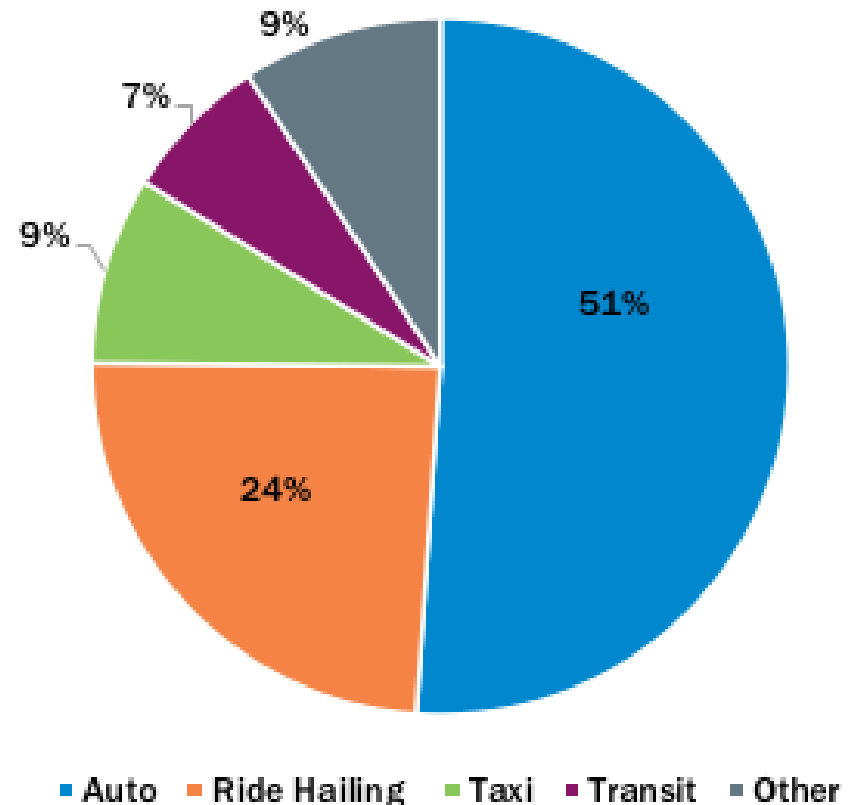


Note:- Non-respondents are not included

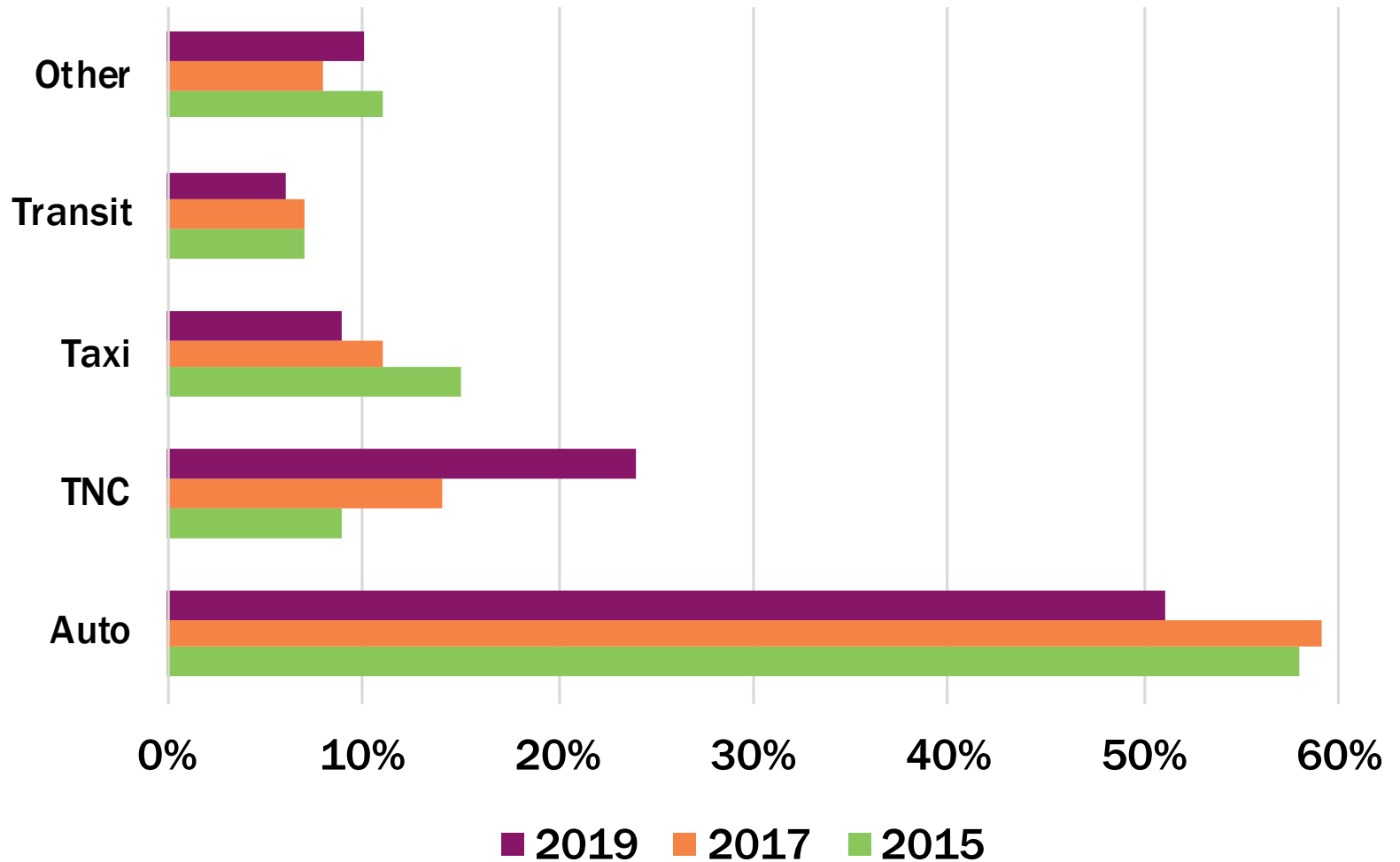


# Local Air Passenger Mode of Access

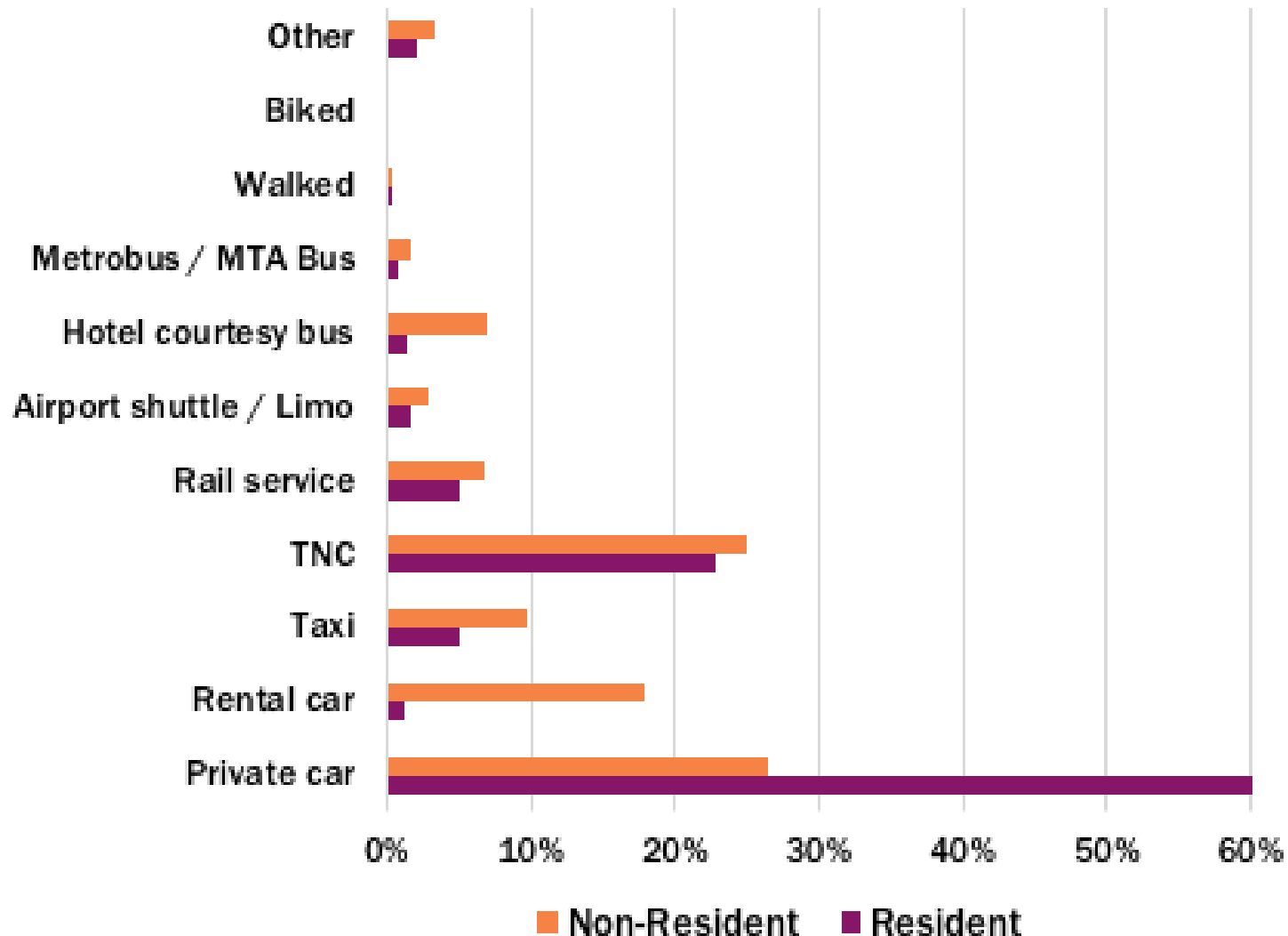
- Auto share (private & rental cars) decreased 59% → 51%
- Taxi share decreased 11% → 9%
- TNC share increased 14% → 24%
  - BWI: 8% → 13%
  - DCA: 21% → 36%
  - IAD: 13% → 22%
- Transit remained at 7%
- Other = Hotel Bus (5%), Airport Bus/Limo (2%), Walk (1%), Bike (0%), and “Other” (2%)



# Departing Passengers by Mode of Access



# Mode of Access by Resident Status



# Mode of Access & Trip Origin

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- 62% of home originating trips and only 11% of non-home originating trips are by private car
- 29% of non-home and 20% of home trips are by TNC
- 18% of non-home and only 5% of home trips are by rental car
- 14% of non-home and only 5% of home trips are by taxi



# Mode of Access & Trip Purpose

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- Private car use accounts for 49% of non-work travel and 28% of work-related travel
- TNCs make up 31% of work travel and 19% of non-work travel
- Metrorail, airport shuttle/limo, and rail service are used equally for work and non-work at 4%, 2%, and 1%, respectively



# Carpooling

Nearly a quarter of those who took a car (including TNCs) to the airport carpooled. Carpooling was highest at DCA and lowest at BWI.

Carpool		BWI	DCA	IAD	Total
Yes	<i>Number</i>	1,814	2,192	1,681	<b>5,687</b>
	<i>Percent</i>	21%	26%	24%	24%
No	<i>Number</i>	3,723	3,981	3,588	<b>11,292</b>
	<i>Percent</i>	44%	48%	50%	47%
Non-Respondents	<i>Number</i>	2,946	2,106	1,881	<b>6,933</b>
	<i>Percent</i>	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>



# Parking

Across the region, 77% of air passengers did not use a parking facility. This number was lowest at BWI (65%), highest at DCA (87%) and precisely at 77% for IAD.

Parking Facility Use		BWI	DCA	IAD	REGION
Used Parking Facility	<i>Number</i>	1,969	543	819	3,331
	<i>Percent</i>	19%	5%	9%	11%
Not Parked	<i>Number</i>	6,782	9,510	6,731	23,023
	<i>Percent</i>	65%	87%	77%	77%
Non-respondents	<i>Number</i>	1,675	865	1,176	3,716
	<i>Percent</i>	16%	8%	13%	12%
<b>TOTAL</b>		<b>10,426</b>	<b>10,918</b>	<b>8,726</b>	<b>30,070</b>





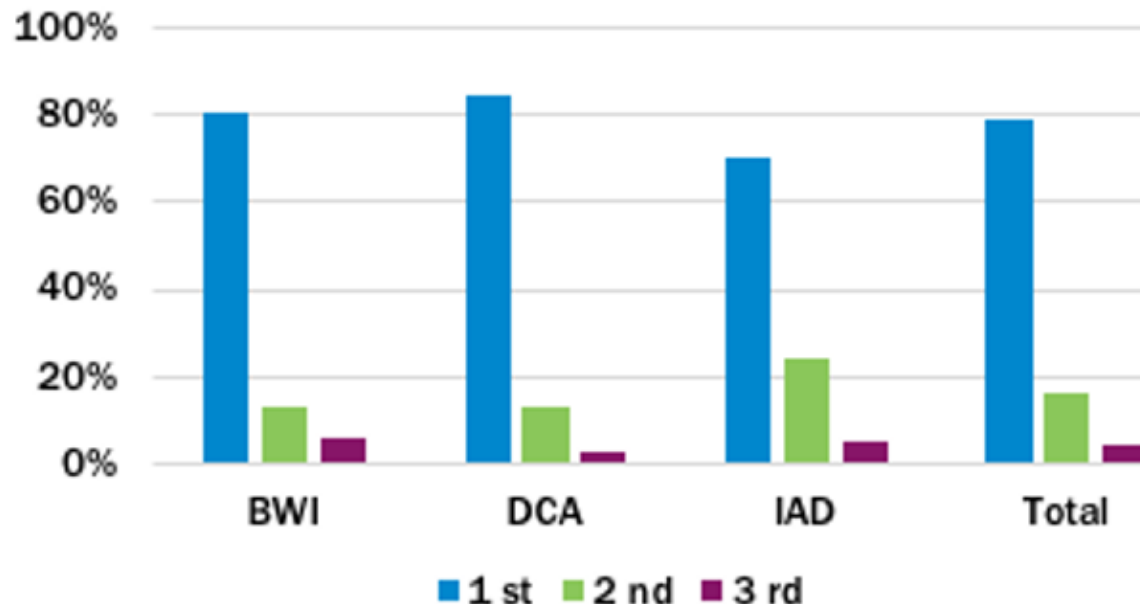
# PREFERENCES AND BEHAVIOR

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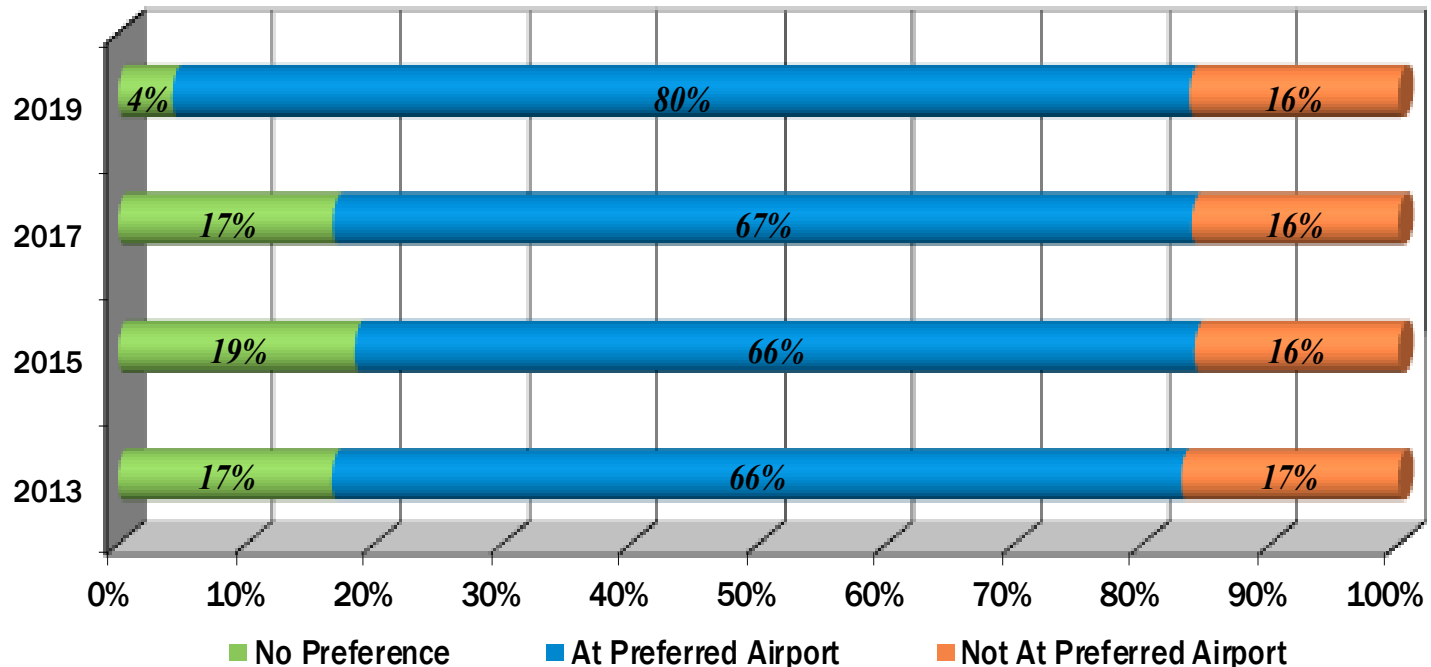
# Airport Ranking (New Question - 2019)

Air travelers primarily selected the airport they were traveling from as their top choice (BWI: 81%, DCA: 85%, IAD: 71%). Nearly a quarter of IAD travelers ranked it as their second choice; this was true for 13% at BWI and DCA.



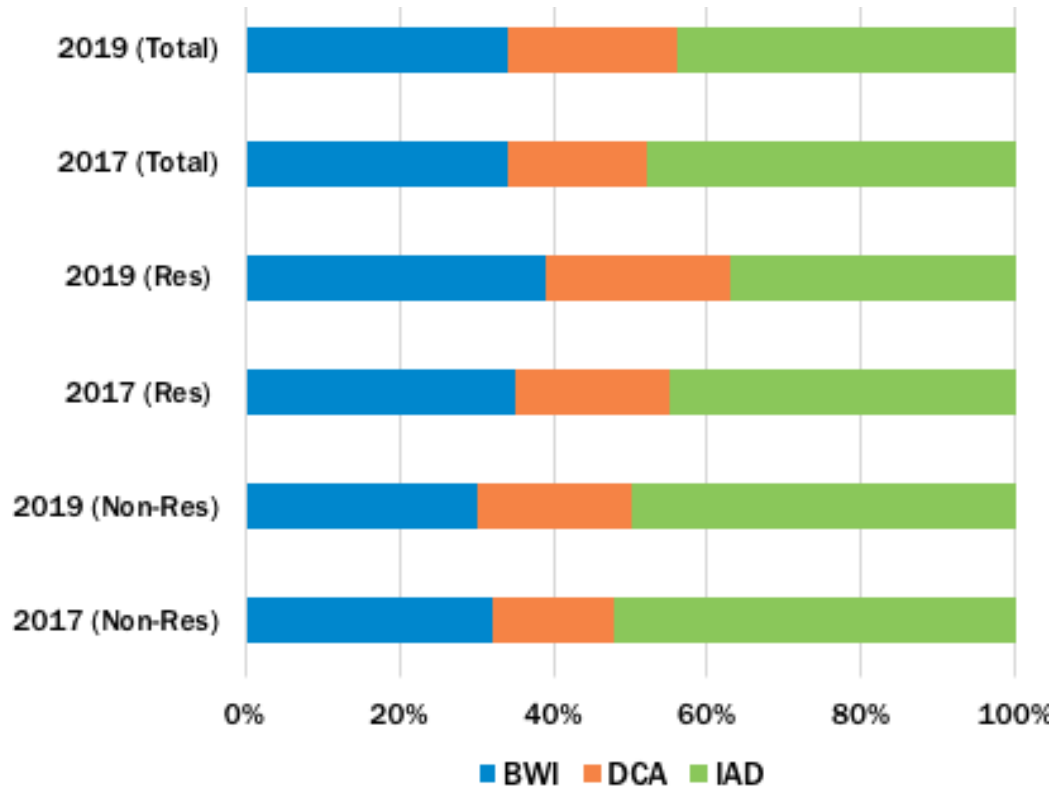
# Longitudinal Airport Satisfaction

Longitudinal airport satisfaction numbers are somewhat skewed due to the lack of a “no preference” option in the 2019 instrument.



# Annual Originating Air Passengers by Preferred Airport and Resident Status

- Resident preference increased for BWI & IAD; decreased for DCA
- Non-resident preference increased for IAD; decreased for BWI and DCA
- Preference increased for IAD; decreased for DCA; no change for BWI



# Reason for Choosing Airport

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## Accessibility

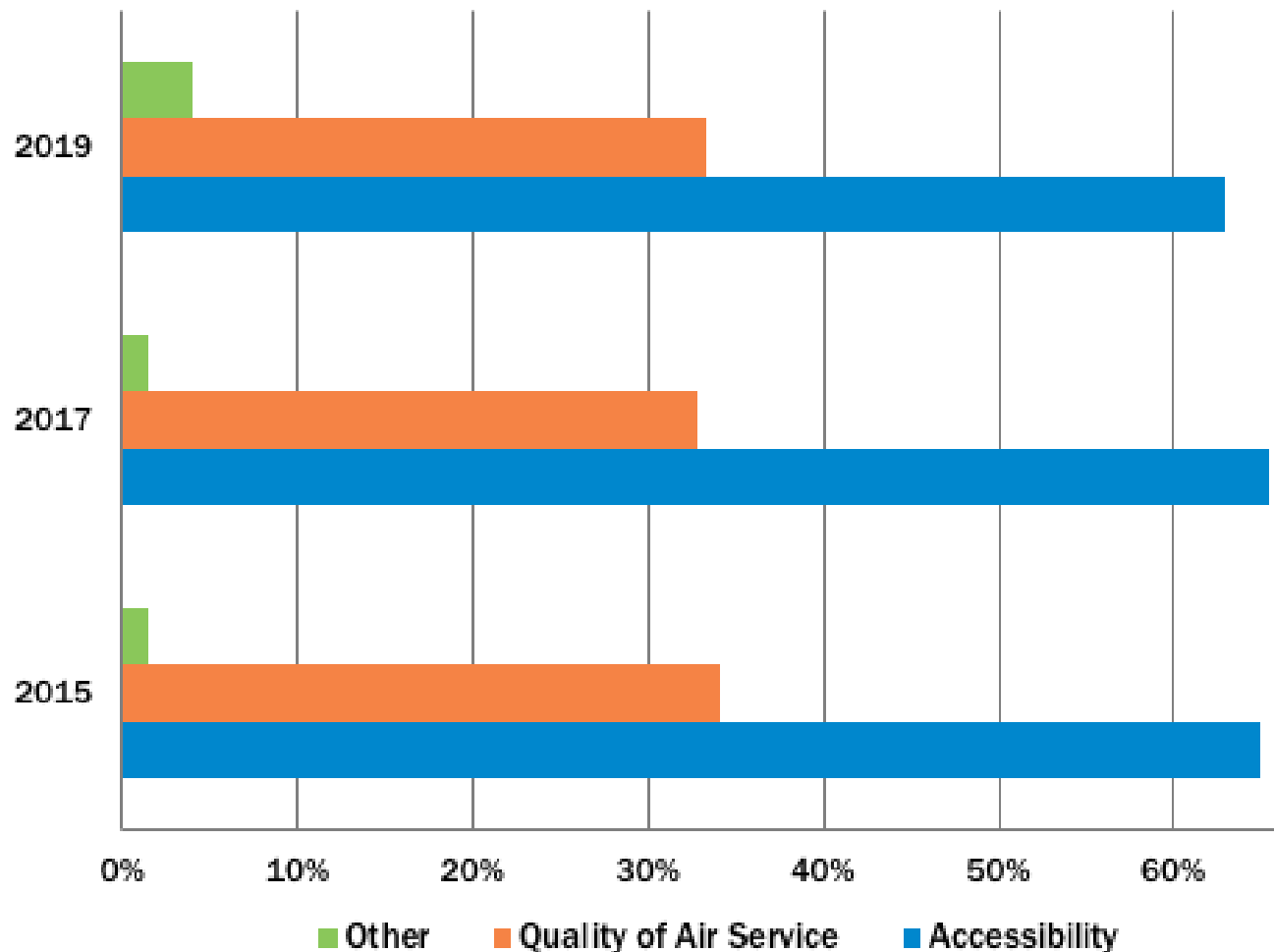
- Closest airport: 58% **\*Top Reason\***
  - BWI: 61% - up from 59% in 2017
  - DCA: 69% - down from 70% in 2017
  - IAD: 44% - down from 47% in 2017
- Easy road access
- Easy access by Metrorail or public transit
- Convenient van/limo or shuttle bus service
- Good parking facilities

## Quality of Air Service

- More convenient flight times
- Less expensive airfare
- Only airport with non-stop flights
- Only airport serving destination
- Frequent flyer / airline loyalty program

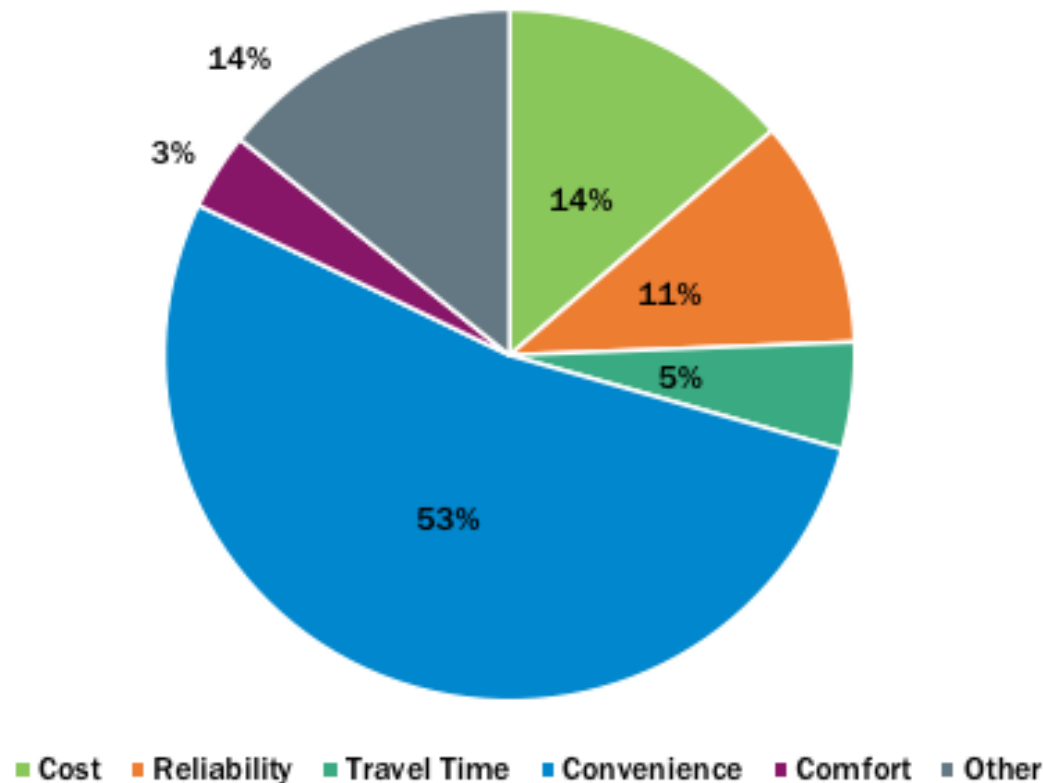


# Reason for Choosing Airport Cont'd



# Reason for Choosing Mode of Access

- 53% of all air passengers choose their mode of access for convenience
- Convenience is less of a factor at IAD than at BWI and DCA
- Cost is less of a factor at DCA; reliability is more of a factor at IAD



# Mode of Access and Age

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- 41% overall; 45% of 65 years+ travel by car
- 24% overall; 32% of 25-34 travel by TNC
- 9% overall; 14% of 65+ travel by taxi; 4-5% of three youngest groups
- 4% overall and 8% of 19-24 travel by Metro





# Mode of Access and Travel Cost

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- **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



# Travel Cost by Airport

**No Cost:** 35% overall; 43% BWI

**\$1-\$4:** 10% at DCA

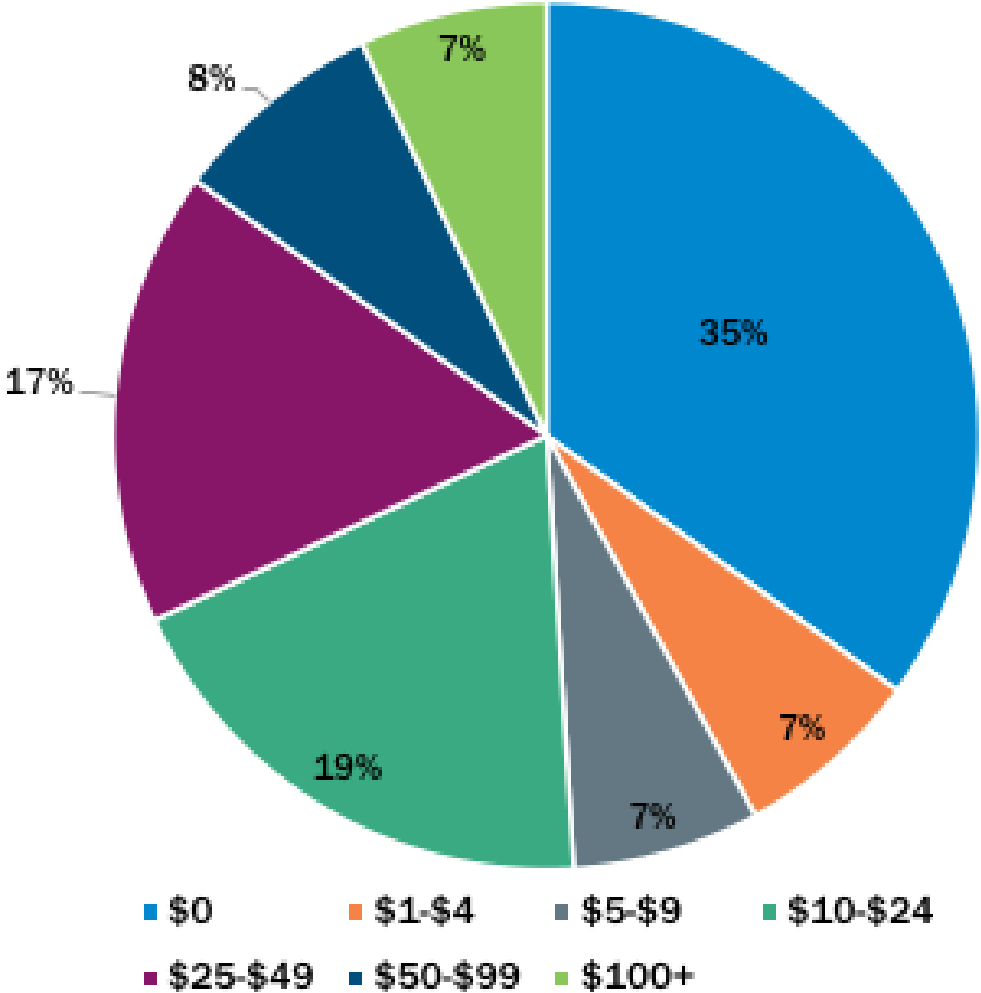
**\$5-\$9:** Nearly equal; 8% BWI

**\$10-\$24:** 30% at DCA

**\$25-\$49:** 22% at IAD

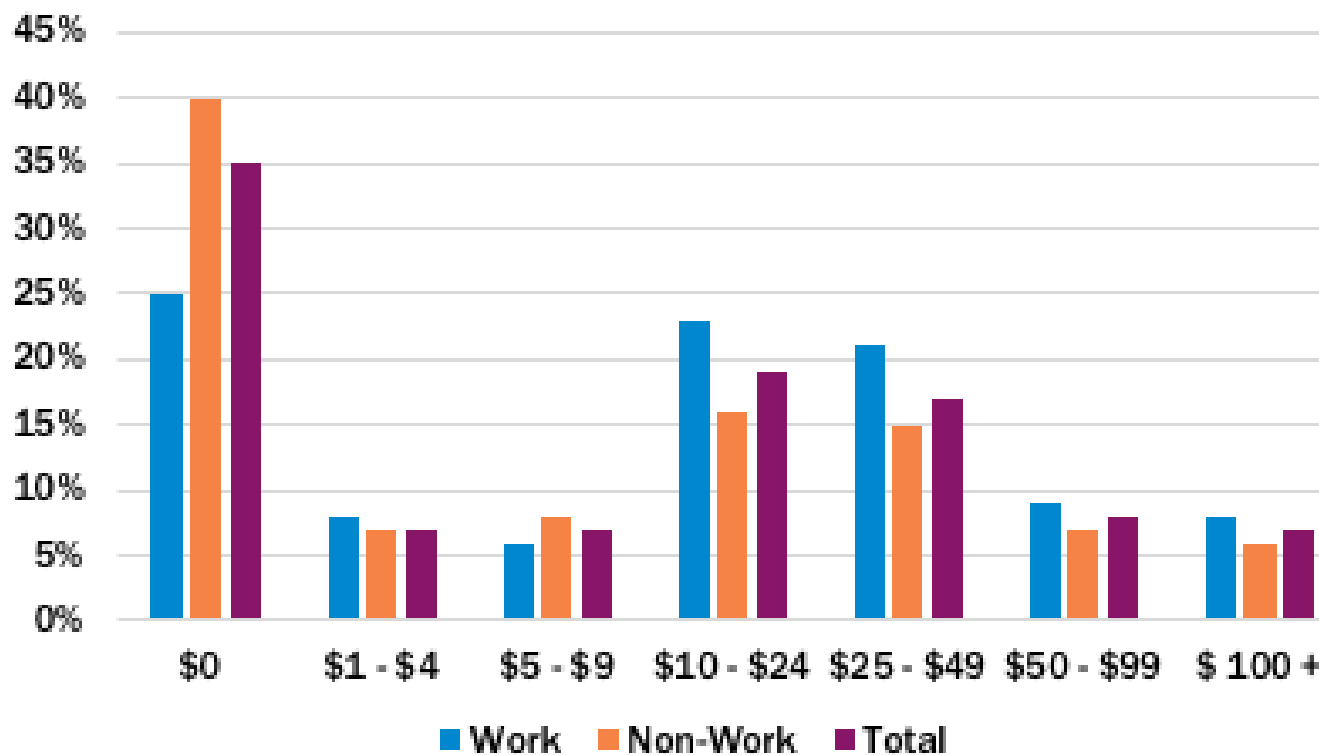
**\$50-\$99:** 12% at IAD

**\$100 or more:** 9% at BWI



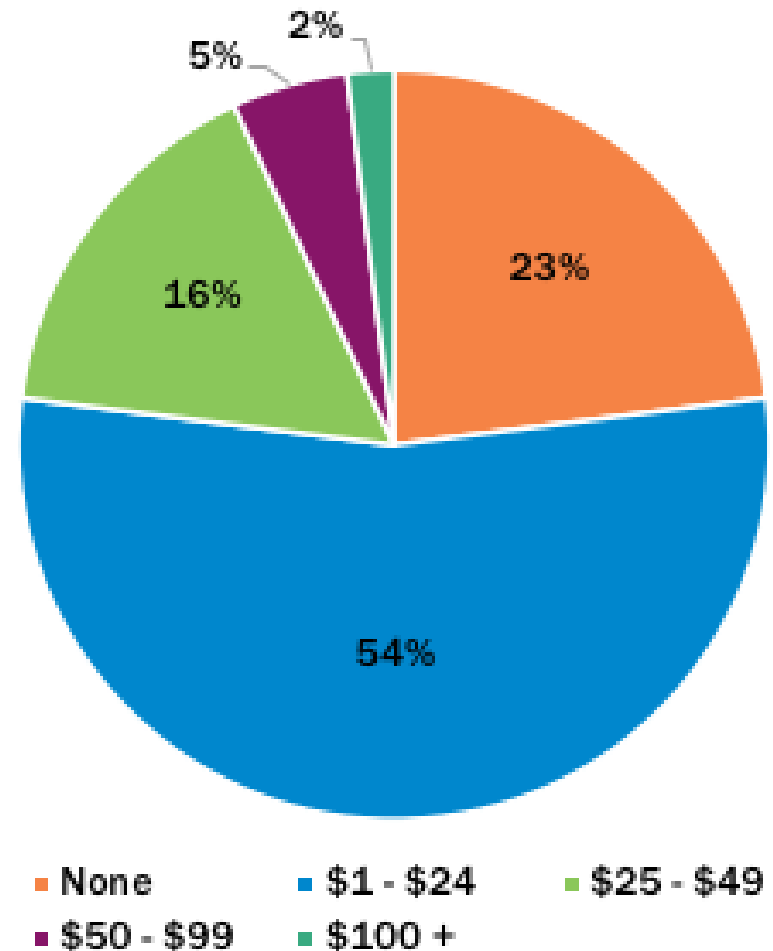
# Travel Cost and Trip Purpose

- Over 1/3 of air passengers (25% work; 40% non-work) reported spending \$0 on their trip to the airport.
- Nearly 20% (21% work; 15% non-work) spent \$10-24.



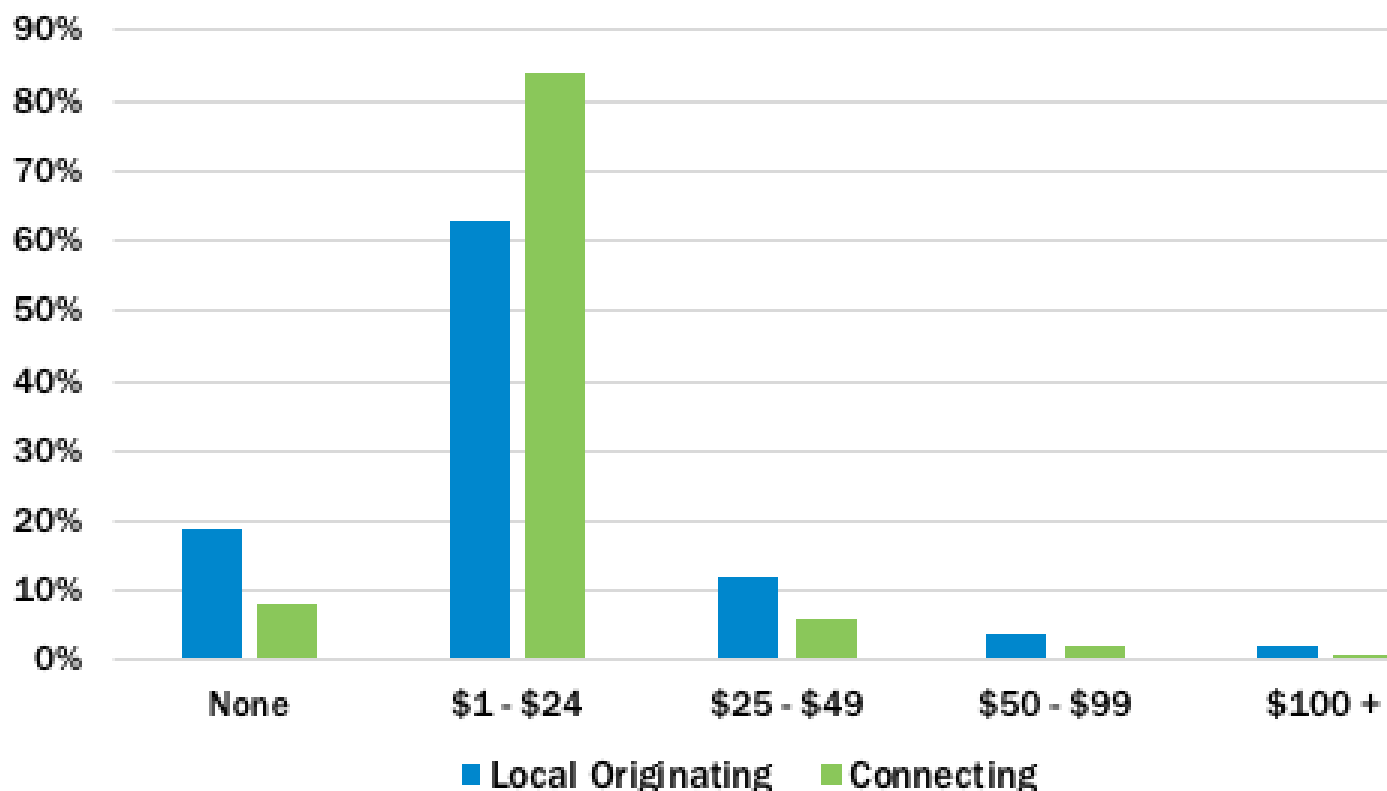
# Airport Spending

- Most spent between \$1-\$24, with little time-based variation
- 23% of overall air passengers did not spend money at the airport
- In each range highest income spent most; lowest spent least
- For the three highest price brackets, most spending happened with those at the airport for the least and greatest amounts of time



# Airport Spending & Arrival Type

- 16% of passengers (19% originating; 8% connecting) spend \$0
- 84% of connecting and 63% of originating passengers spend \$1-\$24
- Originating passengers spend larger sums (\$25-\$100+)



# NEXT STEPS

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- General Findings Report Published Online: **Check It Out!**
- <https://www.mwcog.org/documents/2018/06/29/washington-baltimore-regional-air-passenger-survey--general-findings-report-airport-access/>
- Geo-Coding Survey File Analysis: **Summer 2020**
- Prepare Geographic Findings Report: **Fall 2020**



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