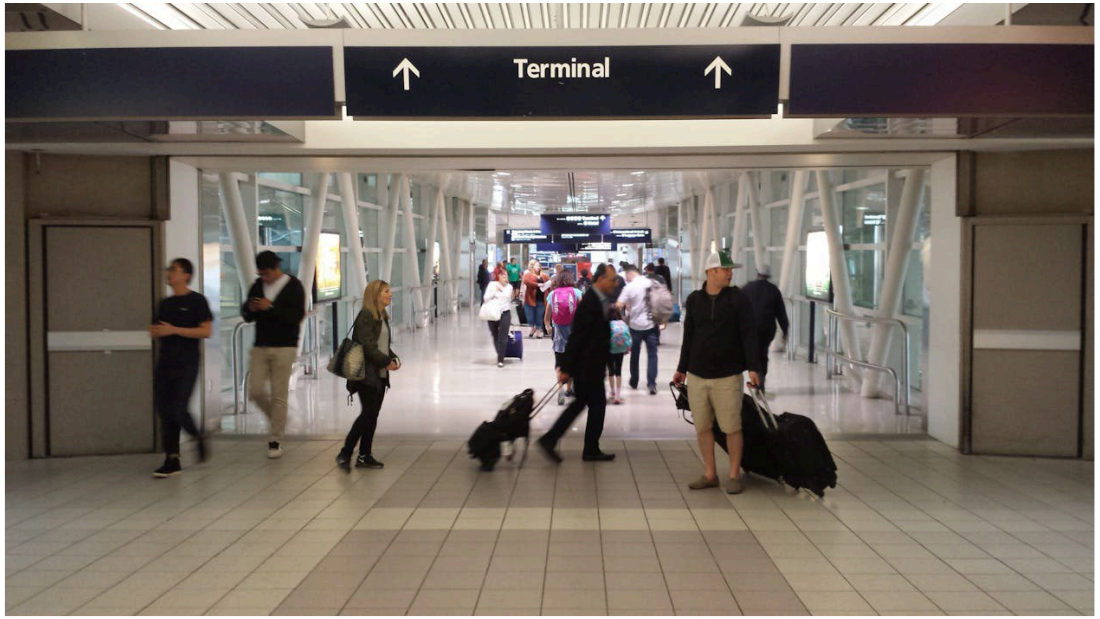
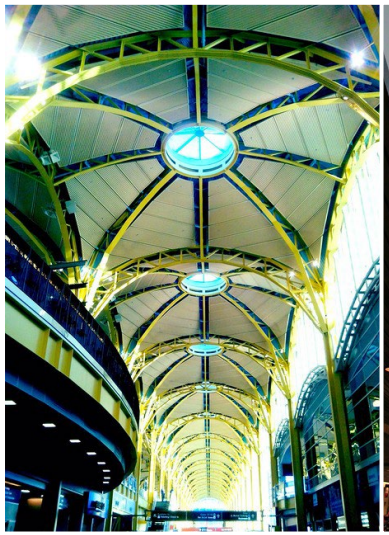


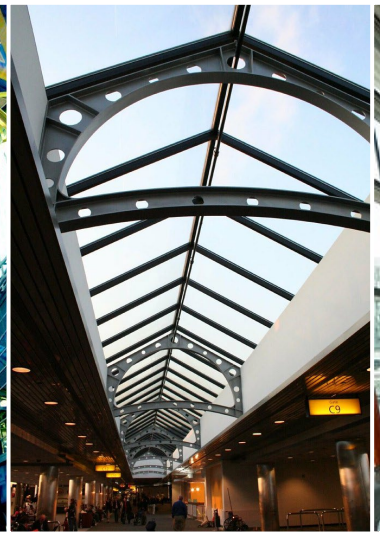
2025 WASHINGTON-BALTIMORE REGIONAL AIR PASSENGER SURVEY

General Findings from the Data

Kenneth Joh, Ph.D., AICP
Program Manager, Travel Surveys, and
Principal Statistical Survey Analyst

Aviation Technical Subcommittee (ATS)
November 19, 2026







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Agenda Item 4

National Capital Region
Transportation Planning Board

Overview

- Survey Overview
- Enplanements
- **General Findings:**
  - → Passenger Characteristics
  - → Ground Access
  - → Preferences and Behavior
- Next Steps







Survey Overview and Fieldwork Recap

- The **2025 Washington-Baltimore Regional Air Passenger Survey (APS)** was conducted at BWI, DCA, and IAD. Originally scheduled for October 2025, it was postponed to April 2026 following the federal government shutdown.
- The survey largely followed the **2023 at-gate intercept approach**, with passengers recruited from selected flights and completing the survey on their own devices using QR codes or on survey tablets.

Main Survey: April 7–20, 2026 **Resurvey:** April 25–30, 2026

Airport	Flights Surveyed	Valid Responses	Revenue Passengers Response Rate	Intercept Passengers Response Rate
BWI	150	3,776	16%	50%
DCA	166	2,541	14%	54%
IAD	183	2,934	12%	47%
All Airports	499	9,251	14%	50%

NOTE: The 2023 survey surveyed 486 flights and included 9,599 valid responses.

Interpreting the Survey Findings

- These responses were weighted to produce estimates of the passenger population represented by the survey.
- Selected questions included in 2023 were omitted from the 2025 survey, including pandemic-related travel questions and airport-experience questions such as security-lane use and concession spending.
- Findings are based on responses to the relevant questions; the number of usable responses varies by topic.
- Comparisons with 2023 use consistent question definitions and categories where possible.
- The 2023 survey was conducted in October, while the 2025 survey was conducted in April 2026. Differences may reflect seasonal travel patterns as well as changes over time.

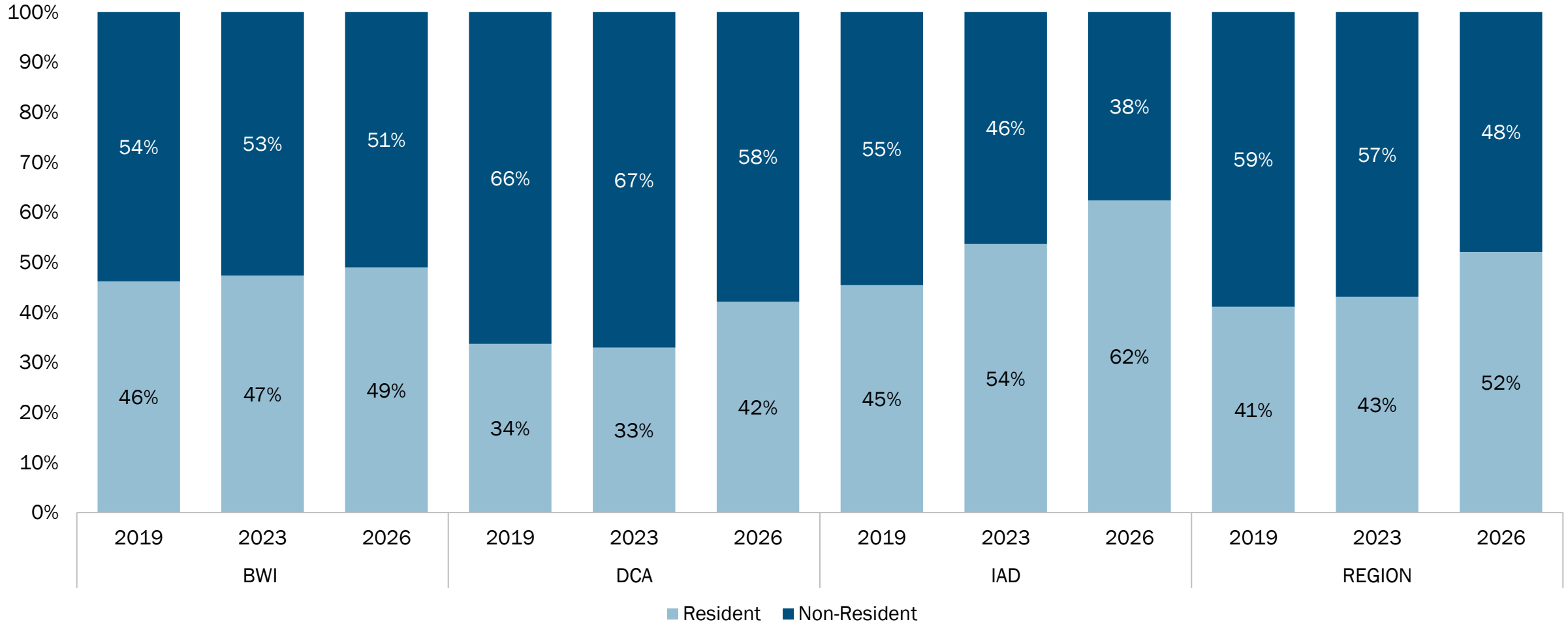
Enplanements

- Regional enplanements increased from 38.2 million in 2023 to 39.2 million in 2026, an increase of approximately 2.5%.
- Connecting passengers accounted for 29% of regional enplanements in 2026, compared with 21% in 2023.
- Local originations declined from 79% to 71% of regional enplanements.
- IAD experienced growth in total enplanements, while BWI and DCA recorded slight declines.

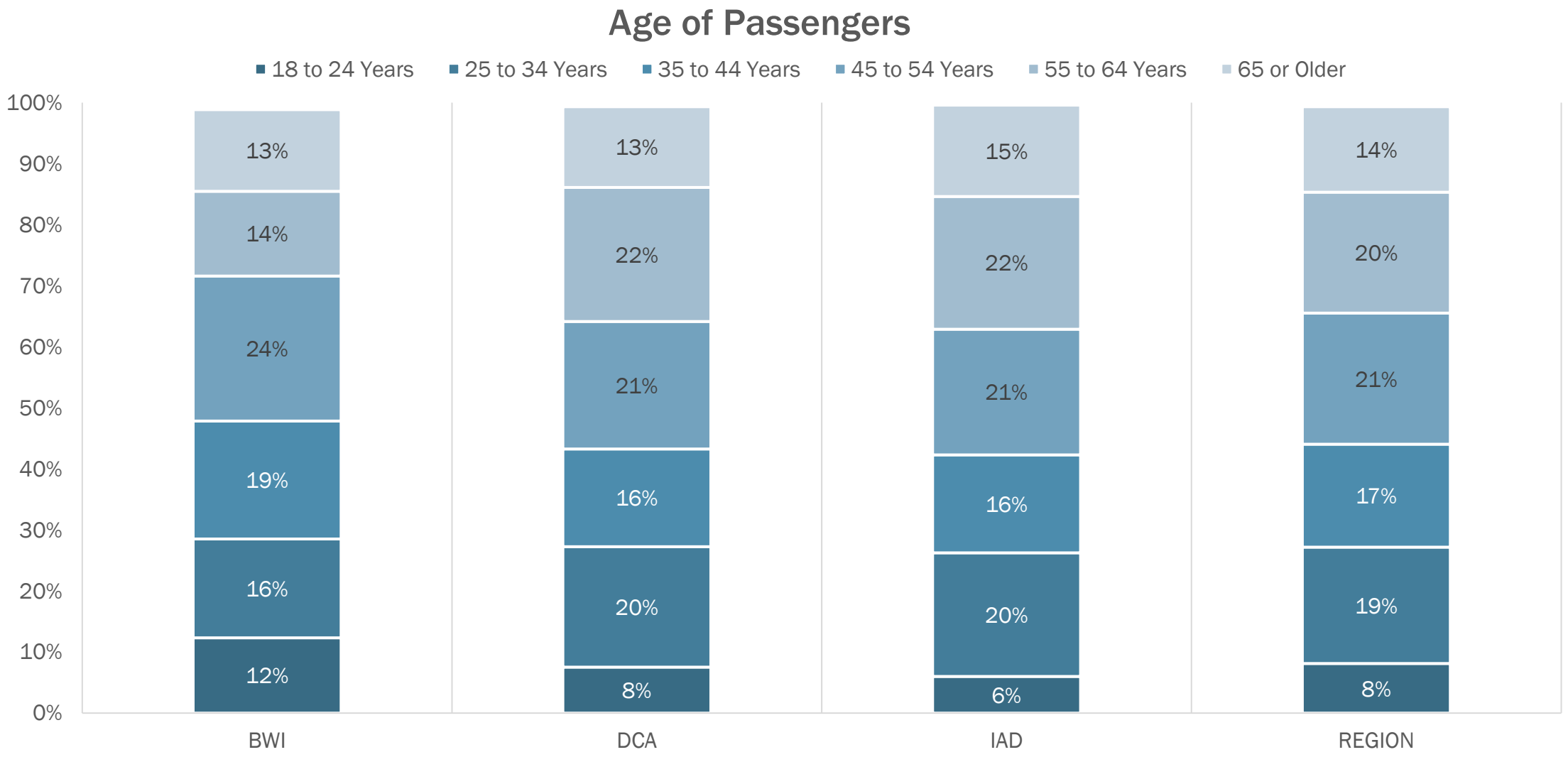
ENPLANEMENT TYPE		BWI			DCA			IAD			REGION		
		2019	2023	2026	2019	2023	2026	2019	2023	2026	2019	2023	2026
Local originations	Number (In 1000's)	10,426	9,679	7,072	10,918	11,062	10,291	8,726	9,447	10,454	30,070	30,189	27,817
	Percent	77%	74%	57%	91%	87%	83%	71%	76%	73%	80%	79%	71%
Connected from another flight	Number (In 1000's)	3,116	3,420	5,416	1,031	1,673	2,163	3,603	2,960	3,810	7,750	8,052	11,389
	Percent	23%	26%	43%	9%	13%	17%	29%	24%	27%	20%	21%	29%
Total Enplanement	Number (In 1000's)	13,542	13,099	12,488	11,949	12,735	12,454	12,329	12,407	14,264	37,820	38,241	39,206
	Percent	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%	100%

PASSENGER CHARACTERISTICS

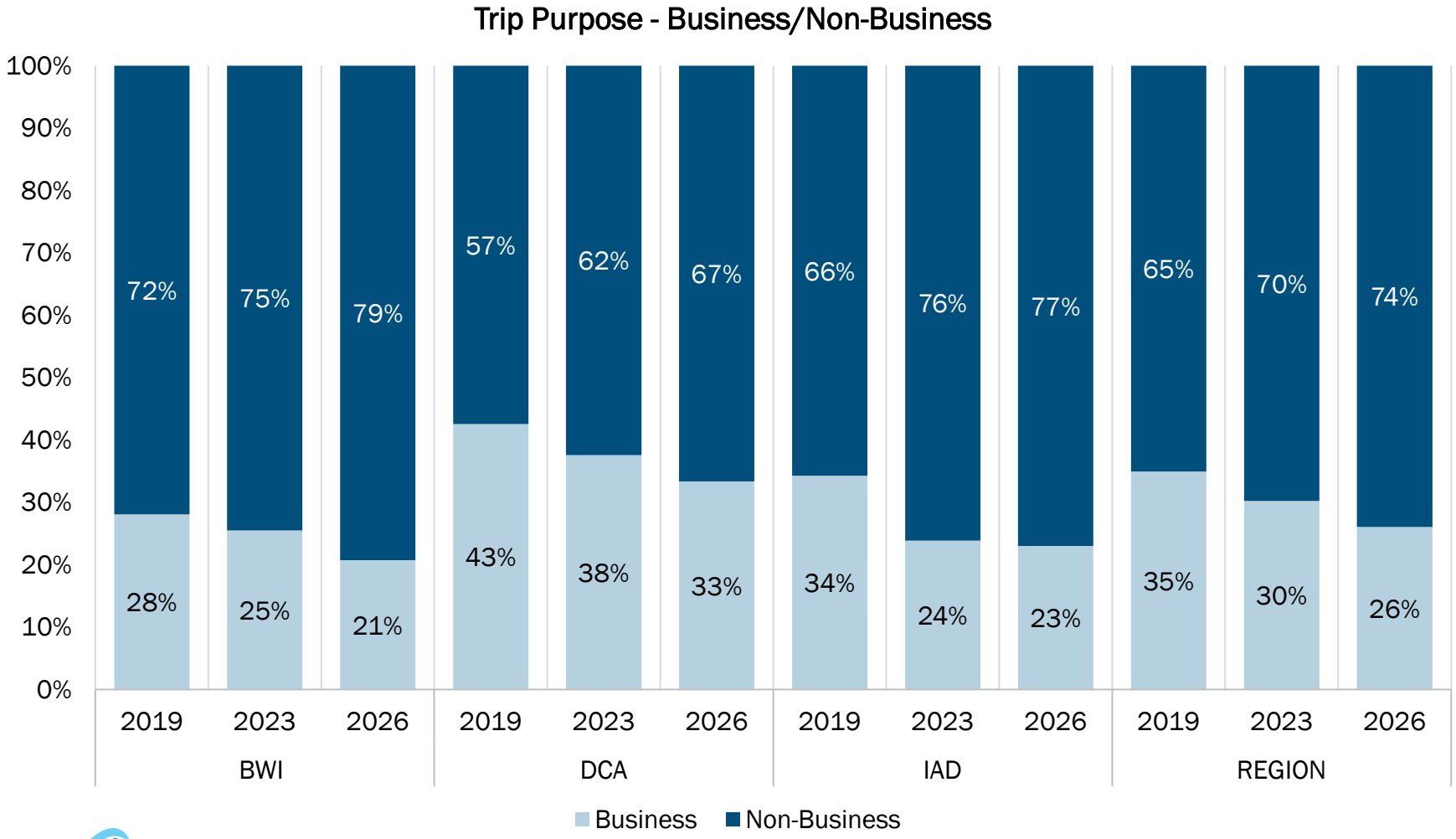
RESIDENT VS. NON-RESIDENT PASSENGERS



AGE DISTRIBUTION – BY AIRPORT



TRIP PURPOSE



CATEGORIES INCLUDED

Business:

- Business related to federal
- Business related to state and local government
- Other business

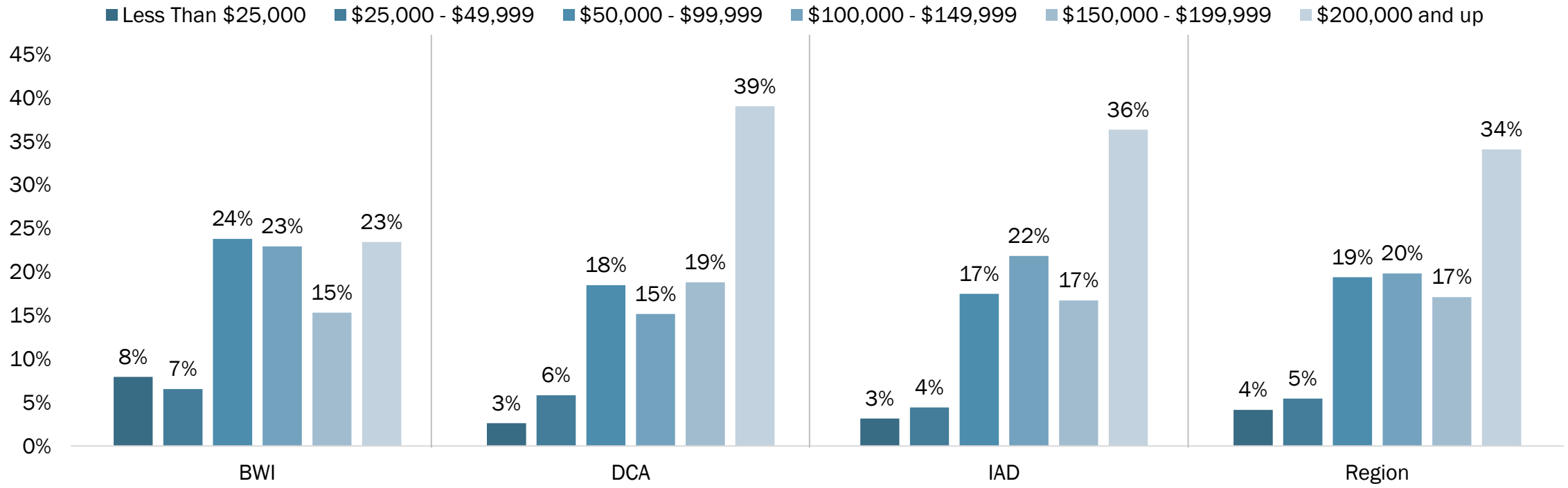
Non-Business:

- Vacation
- Personal or family affairs
- Student or school related
- Other non-business

TRIP PURPOSE BY CATEGORIES

Trip Purpose	BWI			DCA			IAD			REGION		
	2019	2023	2026	2019	2023	2026	2019	2023	2026	2019	2023	2026
Business related to federal government	8%	5%	2%	17%	12%	10%	11%	7%	5%	12%	9%	6%
Business related to state government	2%	4%	1%	2%	3%	3%	2%	1%	2%	2%	3%	2%
Other business	19%	17%	18%	23%	22%	21%	21%	16%	16%	21%	19%	18%
Vacation	32%	37%	37%	24%	30%	29%	28%	43%	48%	28%	36%	38%
Personal or family affairs	33%	32%	32%	26%	24%	29%	28%	29%	25%	29%	28%	28%
Student or school related	6%	5%	10%	6%	7%	6%	8%	2%	3%	7%	5%	6%
Other non-business	1%	1%	0%	1%	2%	3%	2%	2%	1%	1%	2%	1%

HOUSEHOLD INCOME



Passengers from households earning over $200,000 represent the largest group regionwide (34%) in 2026.

This income group comprised:

- 23% of travelers at BWI
- 39% of travelers at DCA
- 36% of travelers at IAD

SUMMARY OF PASSENGER CHARACTERISTICS

- Resident passengers have increased from 2023, now representing a slight majority of regional air travelers (52%).

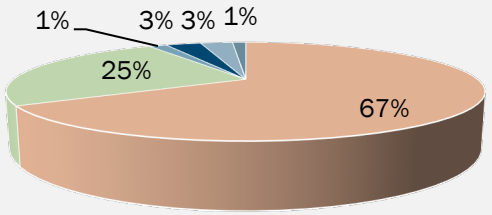
Business travel has continued to decline, while non-business (i.e., leisure/vacation and personal) travel has increased across the region, accounting for nearly three-quarters of passengers.

- Vacation travel comprises the largest share of passengers at IAD, while DCA continues to maintain the highest business travel share.
- Approximately seven in ten regional passengers report annual household incomes of $100,000 or more.

GROUND ACCESS

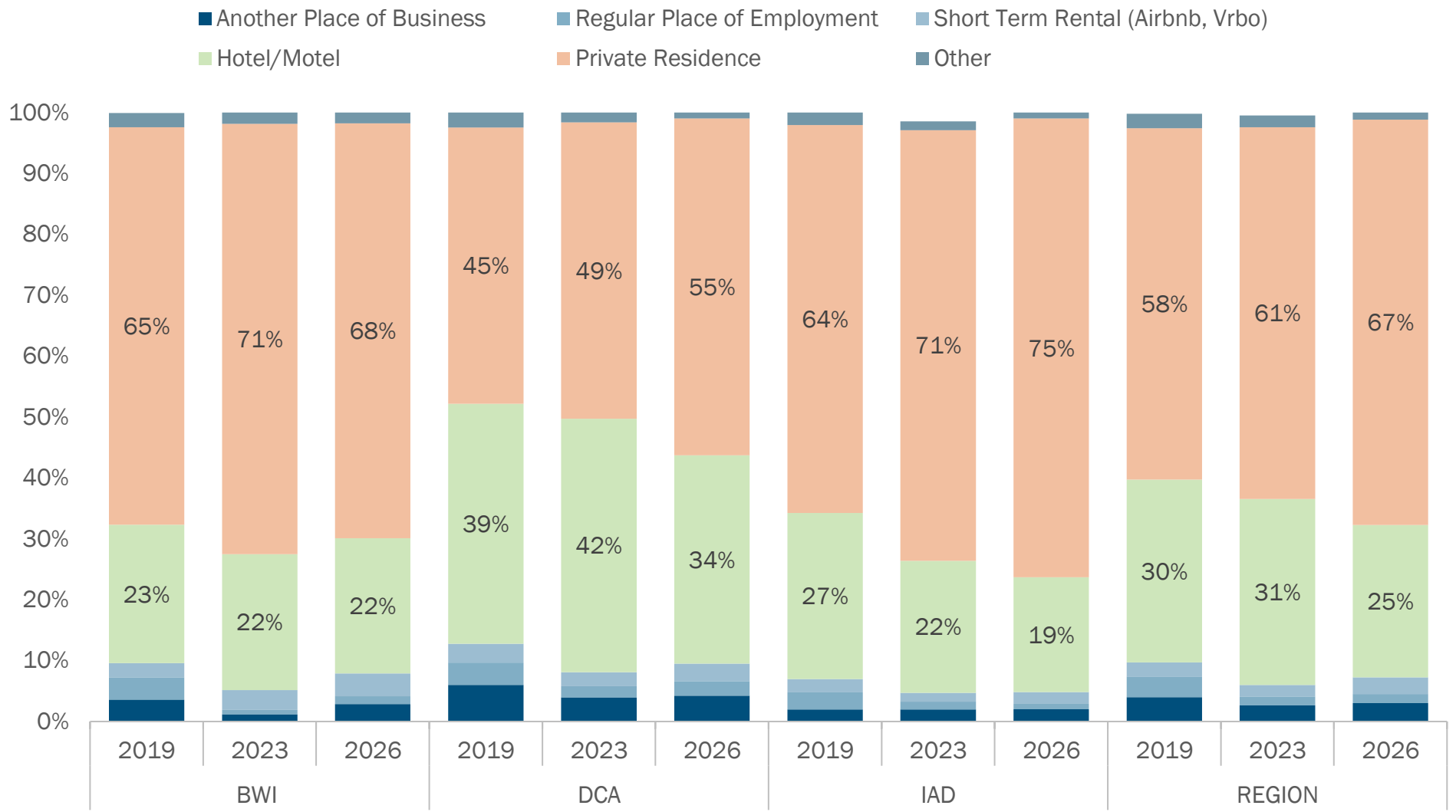
REGION

PASSENGER TRIP ORIGIN IN THE REGION

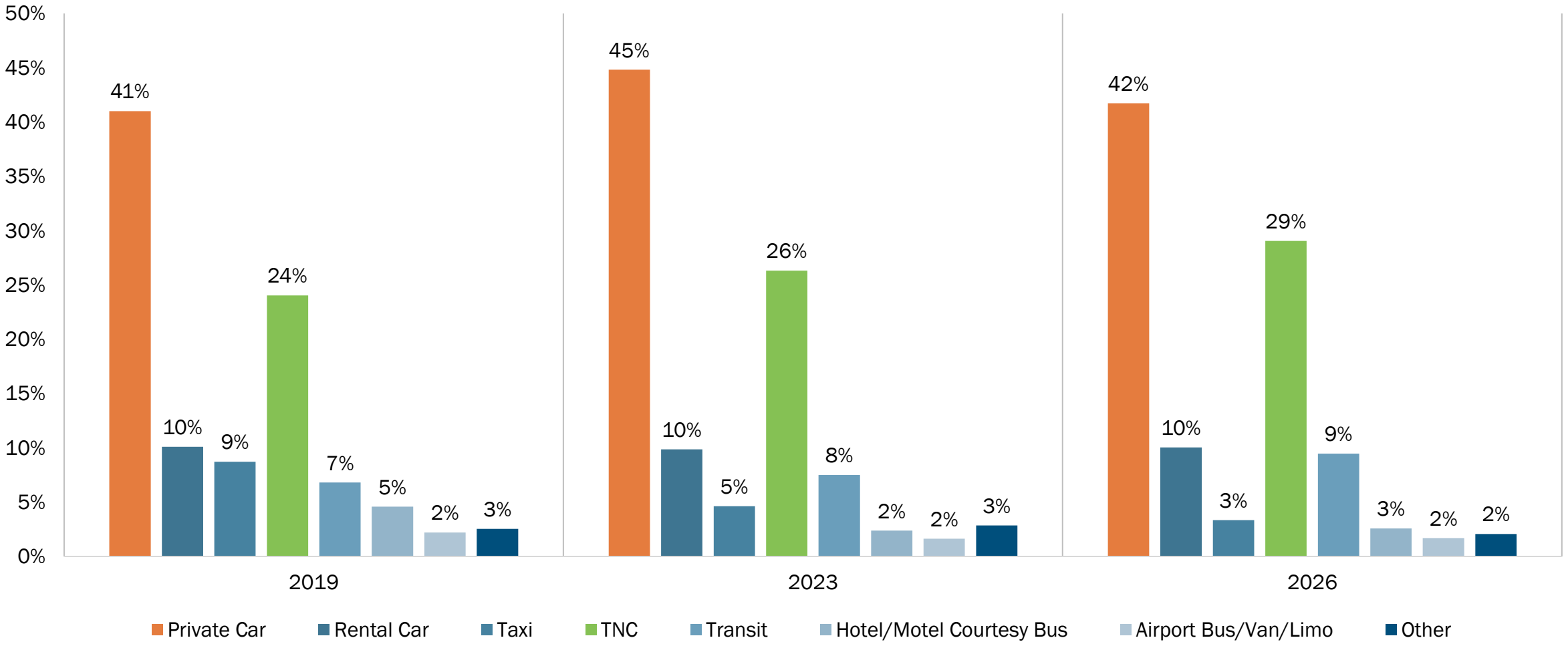


- Private Residence
- Hotel/Motel
- Regular Place of Employment
- Another Place of Business
- Short Term Rental (Airbnb, Vrbo)
- Other

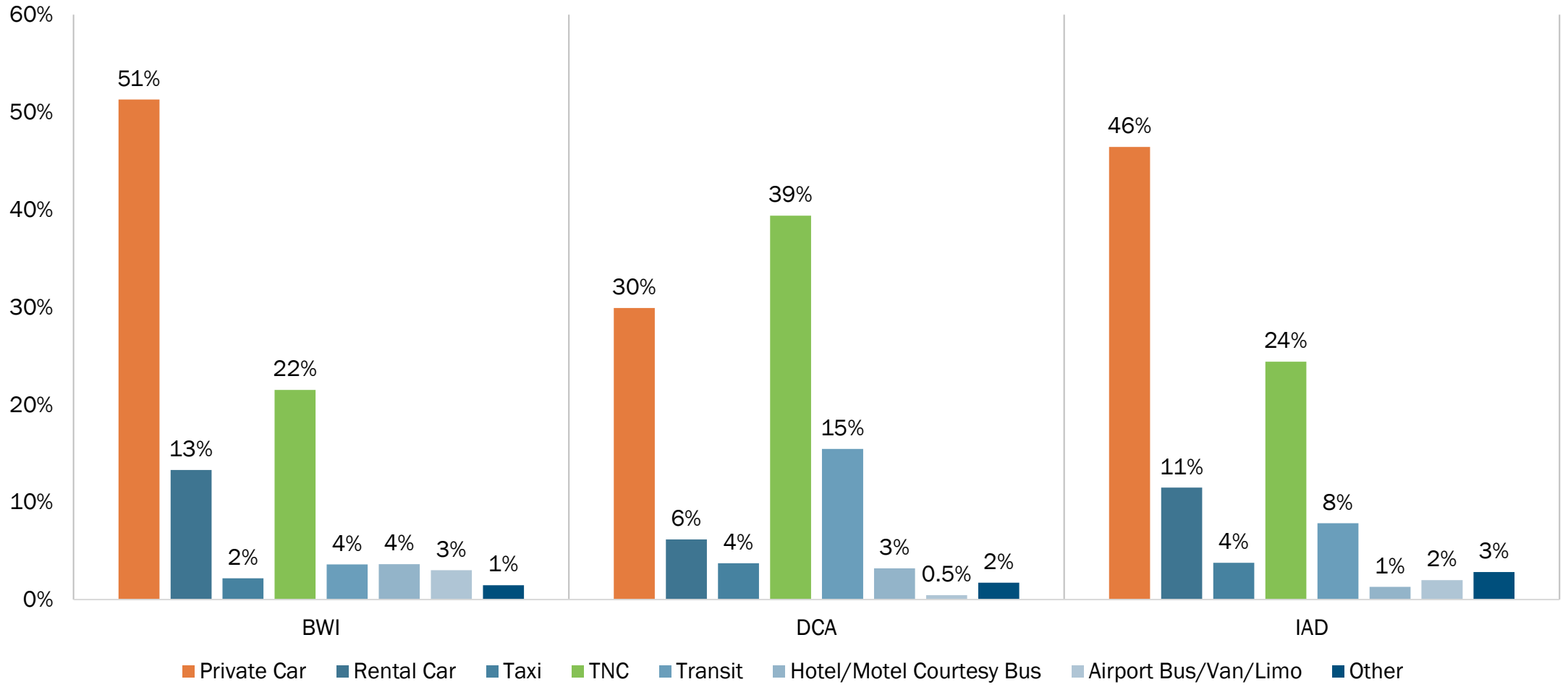
PASSENGER TRIP ORIGIN



PASSENGER MODE ACCESS - REGION



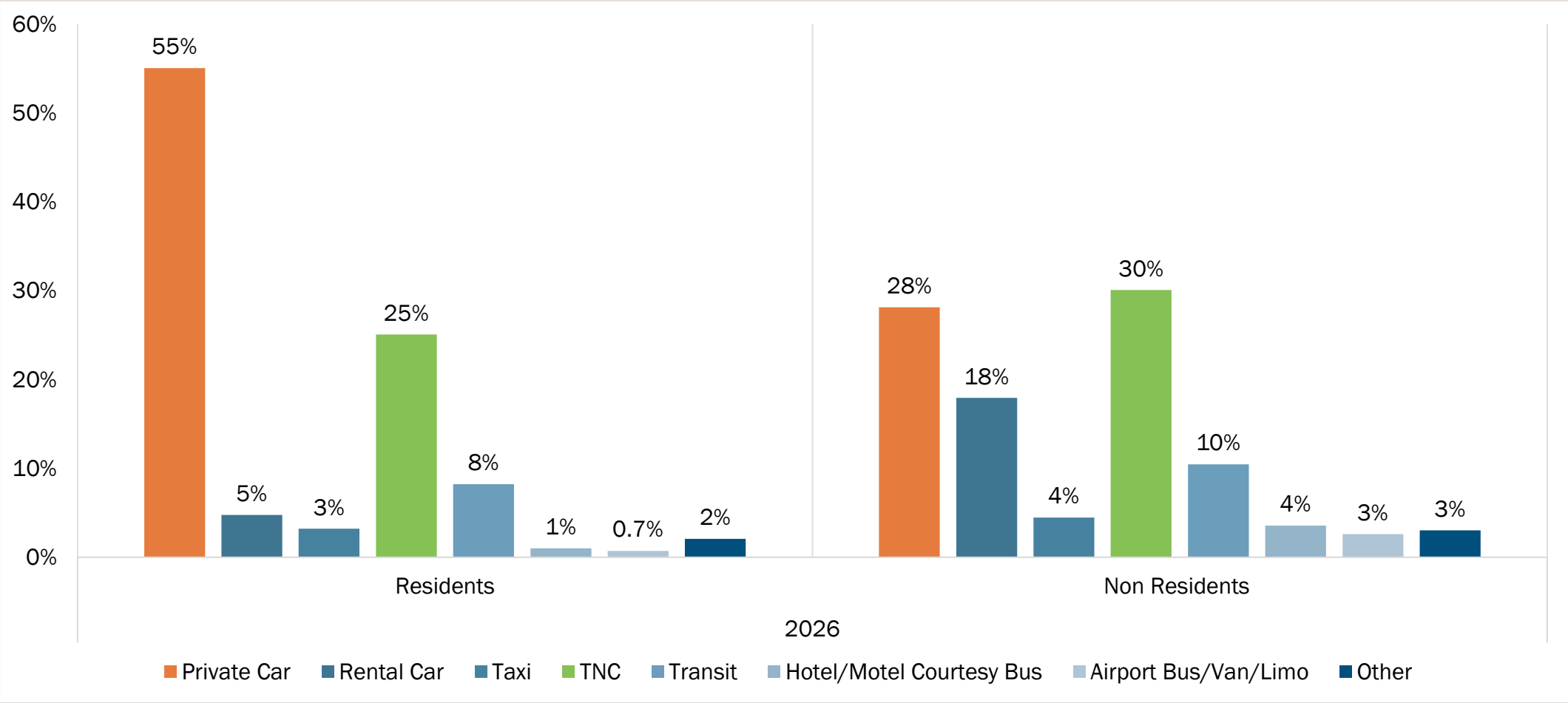
PASSENGER MODE ACCESS BY AIRPORT



PASSENGER MODE ACCESS BY AIRPORT

Mode of Access	BWI			DCA			IAD			REGION		
	2019	2023	2026	2019	2023	2026	2019	2023	2026	2019	2023	2026
Private Car	57%	58%	51%	23%	30%	30%	45%	49%	46%	41%	45%	42%
Rental Car	13%	12%	13%	8%	9%	6%	10%	9%	11%	10%	10%	10%
Taxi	3%	2%	2%	12%	6%	4%	12%	6%	4%	9%	5%	3%
TNC	13%	17%	22%	36%	37%	39%	22%	24%	24%	24%	26%	29%
Transit	4%	4%	4%	13%	13%	15%	3%	5%	8%	7%	8%	9%
Hotel/Motel Courtesy Bus	5%	2%	4%	5%	2%	3%	4%	3%	1%	5%	2%	3%
Airport Bus/Van/Limo	2%	3%	3%	2%	0%	0%	2%	2%	2%	2%	2%	2%
Other	3%	3%	1%	2%	3%	2%	2%	2%	3%	3%	3%	2%

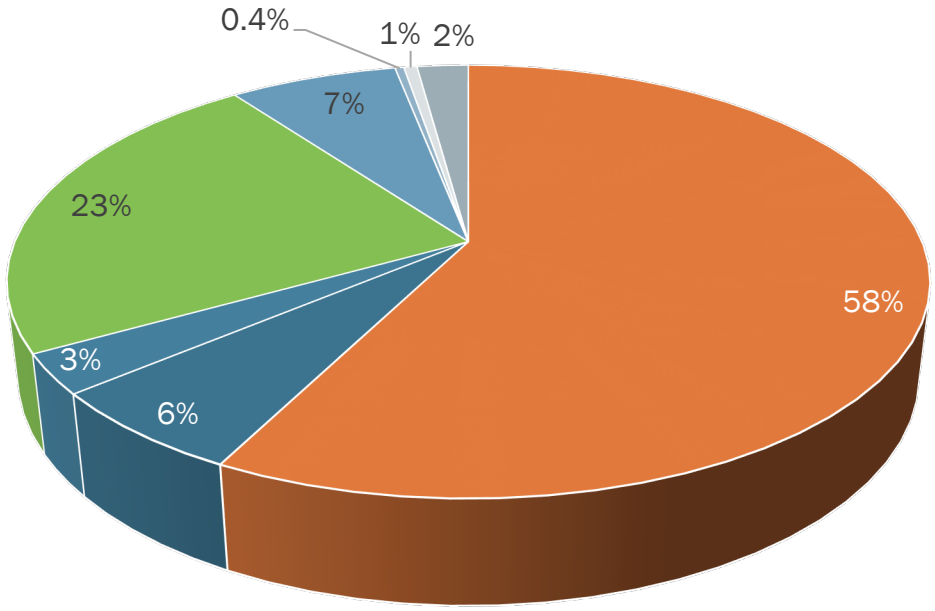
PASSENGER MODE ACCESS – RESIDENT STATUS



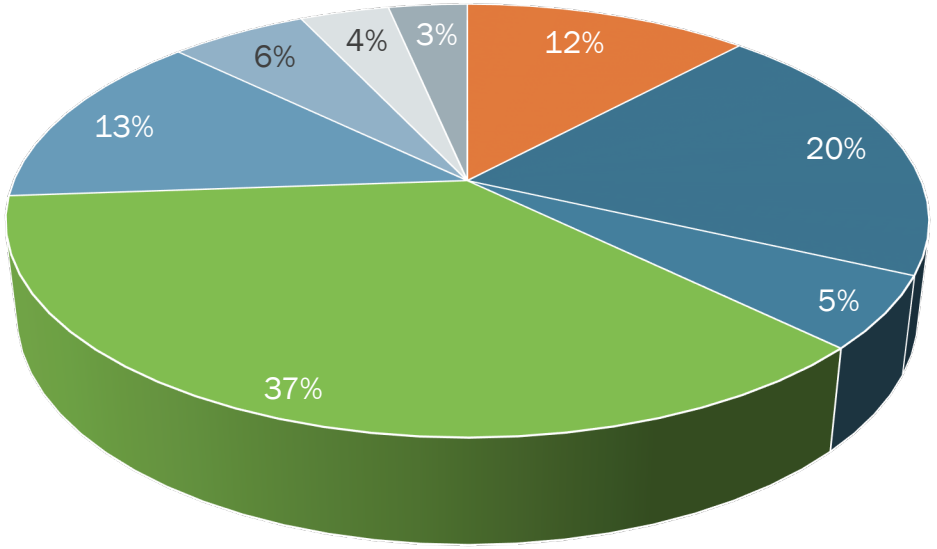
PASSENGER MODE ACCESS – HOME / NON-HOME

REGION

Home



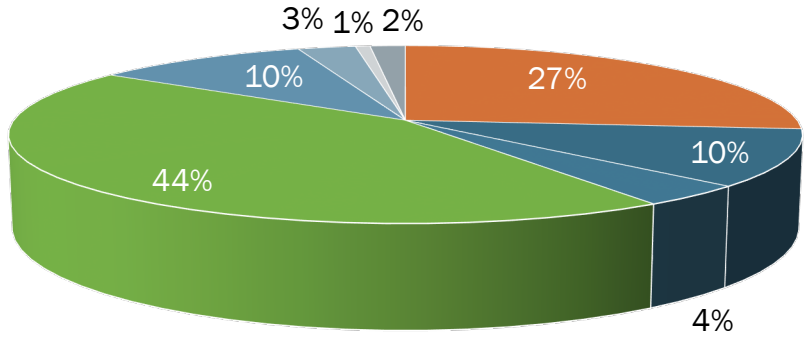
Non-Home



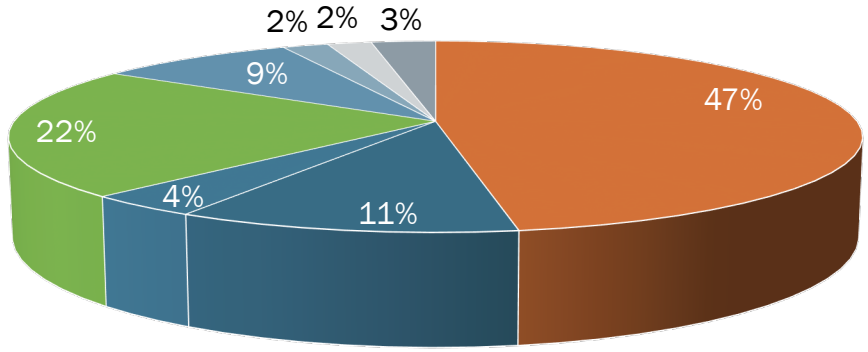
- Private Car
- Rental Car
- Taxi
- TNC
- Transit
- Hotel/Motel Courtesy Bus
- Airport Bus/Van/Limo
- Other

PASSENGER MODE ACCESS – BUSINESS / NON-BUSINESS

Business



Non-Business



- Private Car
- Rental Car
- Taxi
- TNC
- Transit
- Hotel/Motel Courtesy Bus
- Airport Bus/Van/Limo
- Other

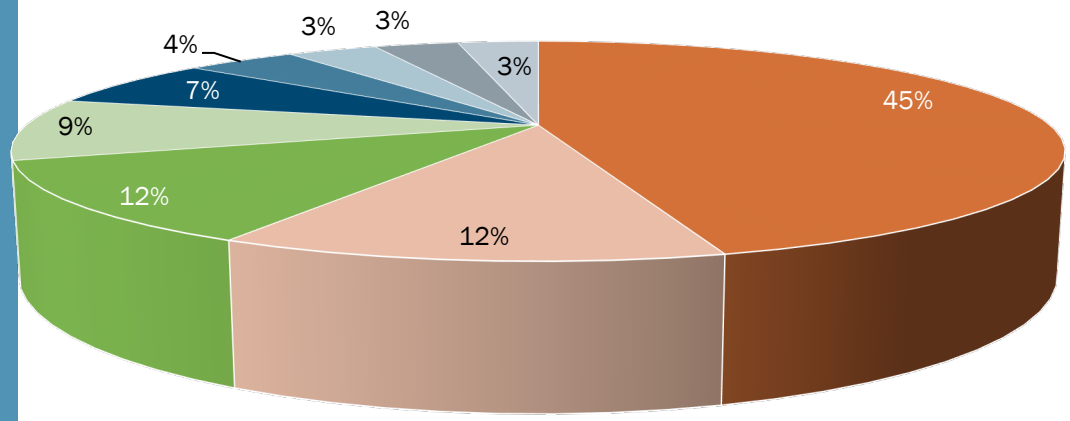
SUMMARY OF GROUND ACCESS

- The share of air passengers originating from private residences has continued to increase since 2019, accounting for two-thirds of regional passengers.
- While private car remains the primary mode of airport access, TNC usage has increased across all regional airports over time, accounting for 29% of all airport trips. Conversely, taxi usage has steadily declined, accounting for only 3% of regional trips.
- Private cars are the most commonly used travel mode among residents, while TNCs are the leading travel mode among non-residents.
- DCA has the highest TNC and transit access shares; transit use has increased at both DCA and IAD since 2023.
- TNCs are the most commonly used airport access mode among business travelers and passengers originating from non-home locations.

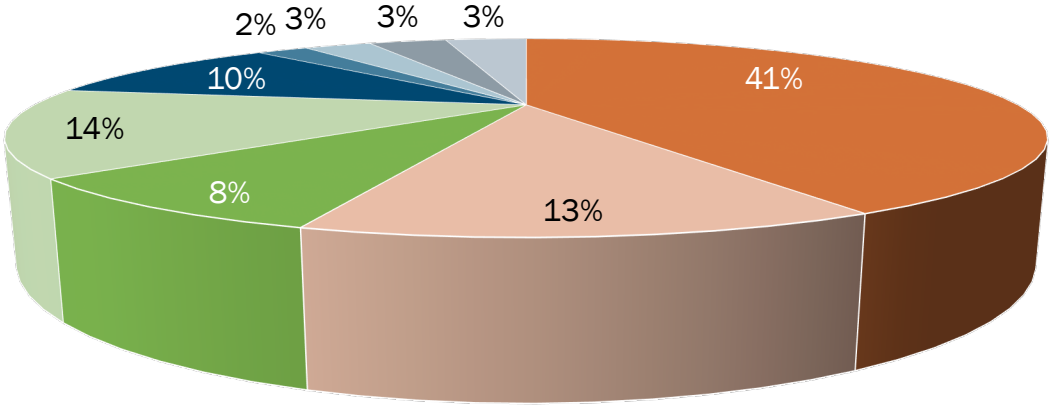
PREFERENCES AND BEHAVIOR

TOP REASON FOR CHOOSING THE AIRPORT

REGION 2023

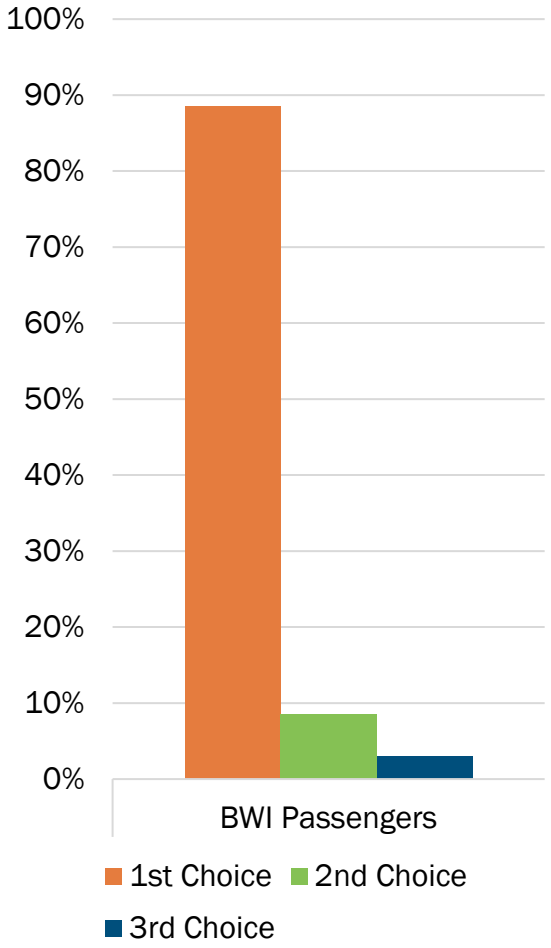


REGION 2026

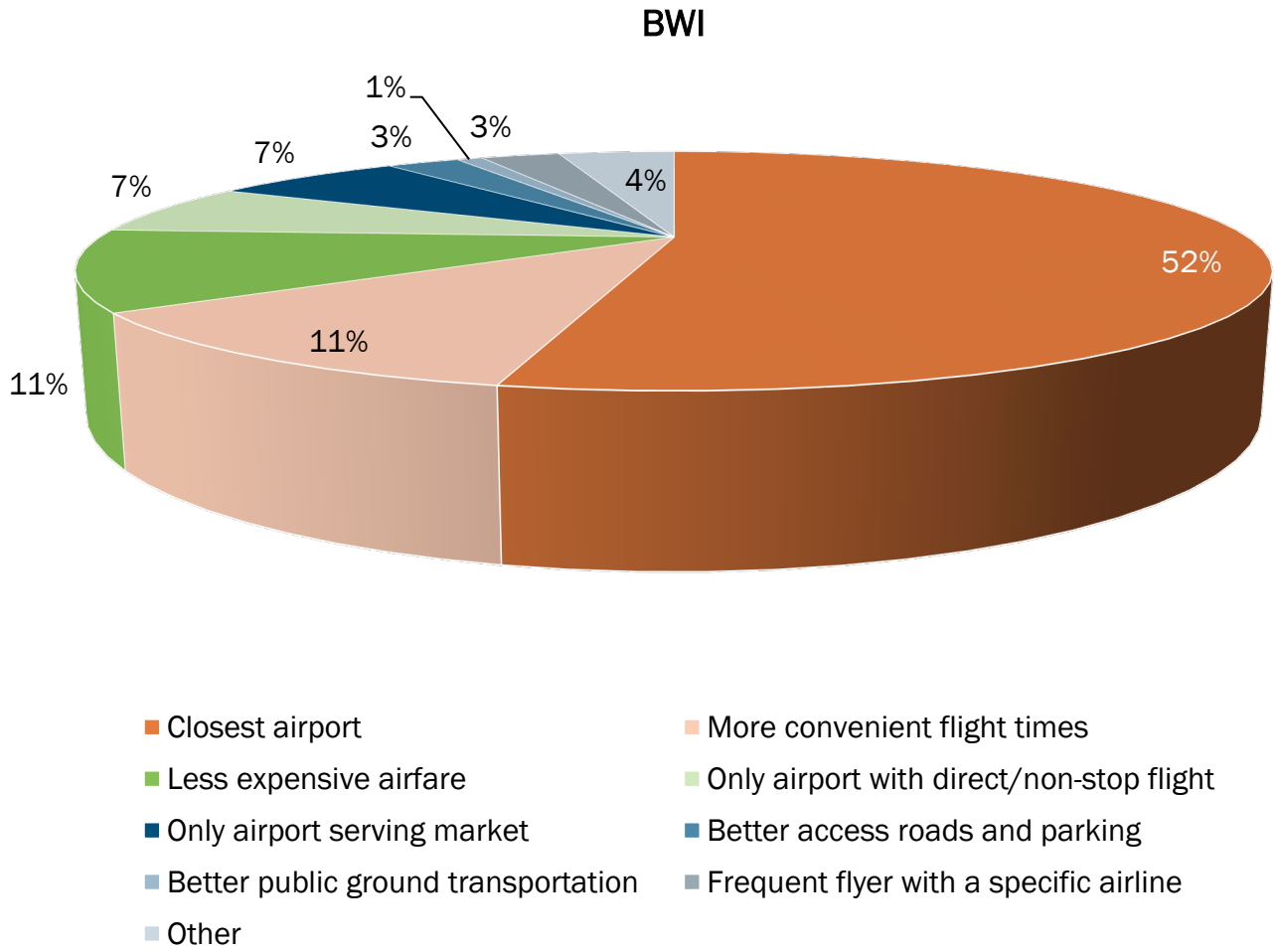


- Closest airport
- Less expensive airfare
- Only airport serving market
- Better public ground transportation
- Other
- More convenient flight times
- Only airport with direct/non-stop flight
- Better access roads and parking
- Frequent flyer with a specific airline

AIRPORT CHOICE FOR BWI PASSENGERS

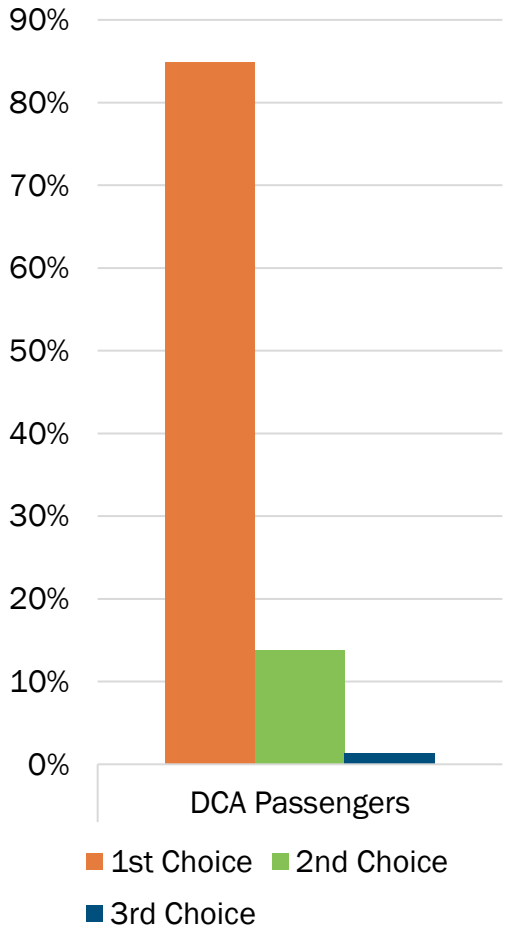


BWI – TOP REASON FOR CHOOSING THE AIRPORT

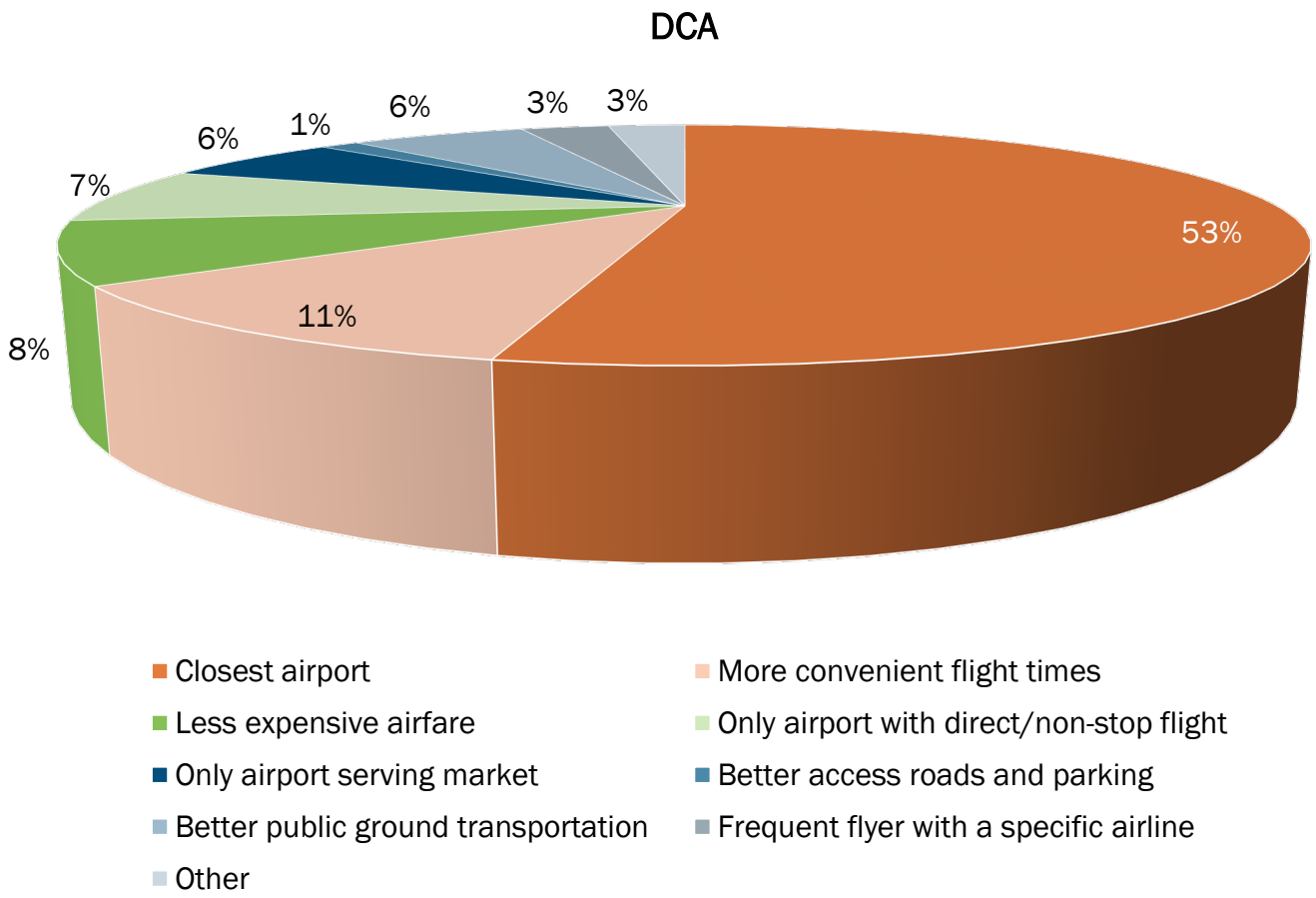


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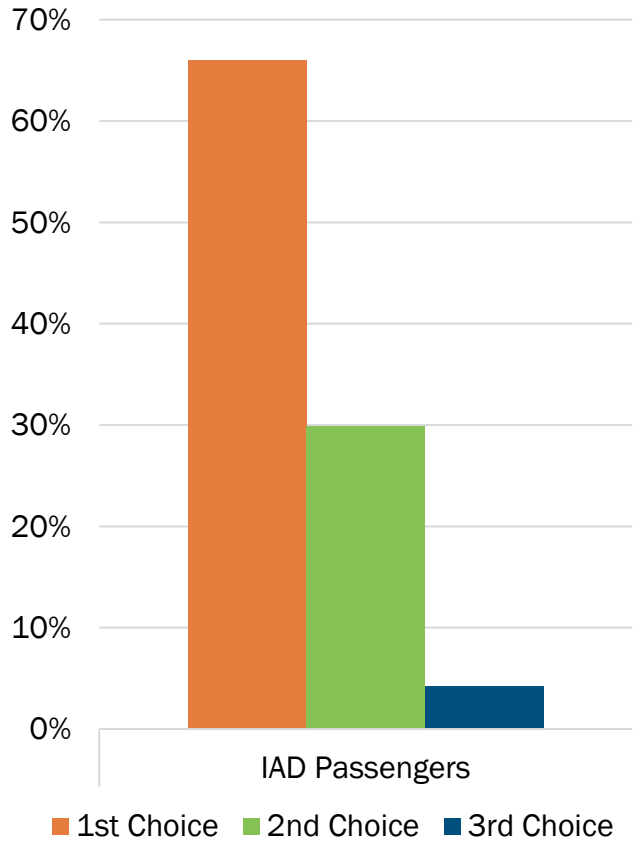
AIRPORT CHOICE FOR DCA PASSENGERS



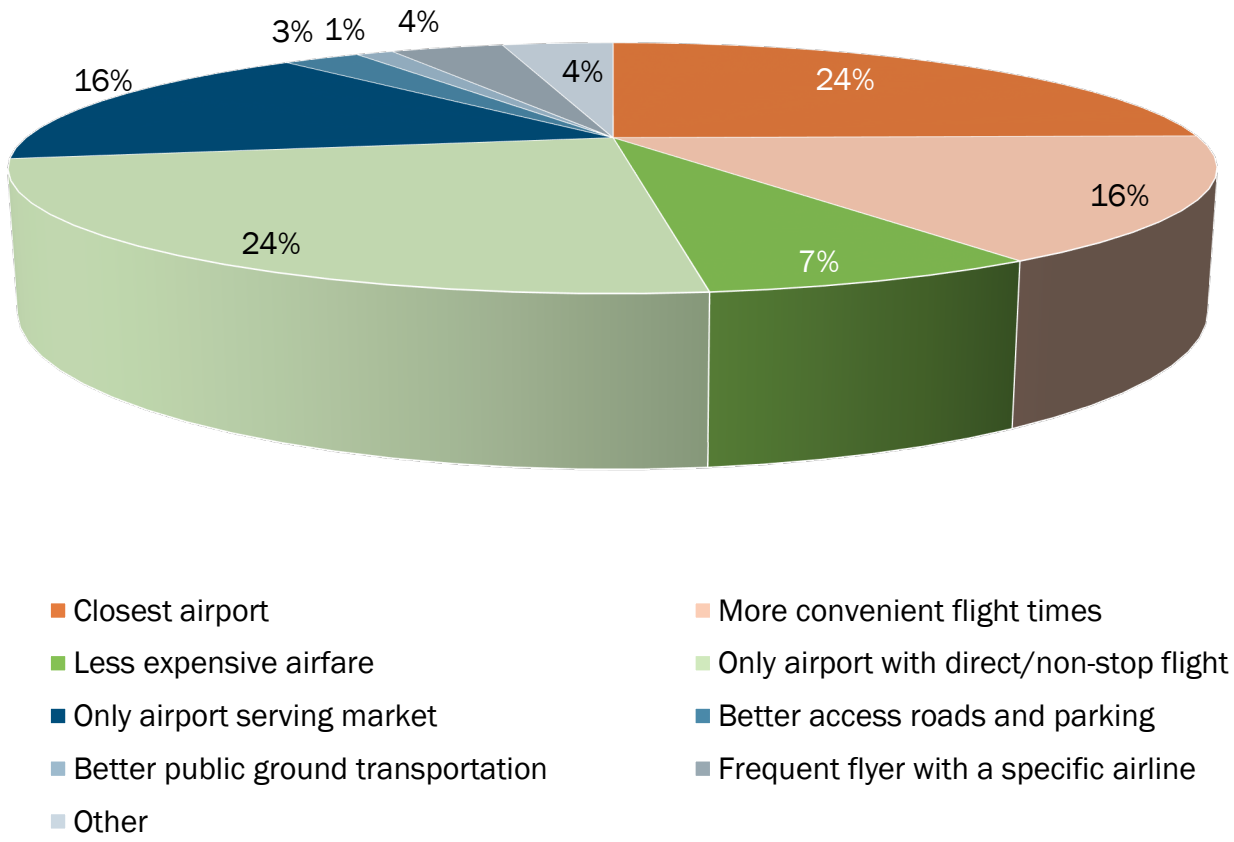
DCA – TOP REASON FOR CHOOSING THE AIRPORT



AIRPORT CHOICE FOR IAD PASSENGERS

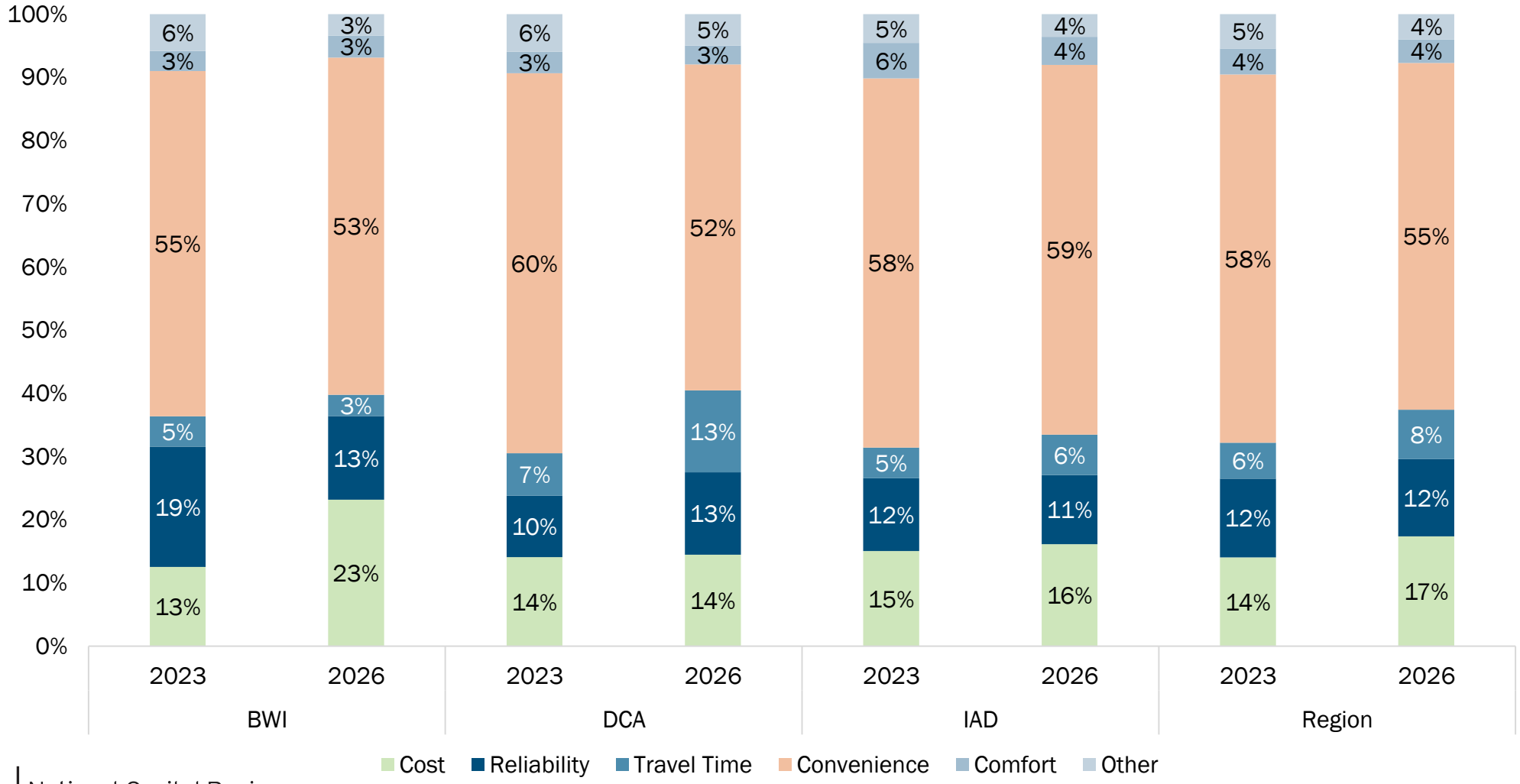


IAD – TOP REASON FOR CHOOSING THE AIRPORT



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REASON FOR CHOOSING MODE OF ACCESS



SUMMARY OF PREFERENCES AND BEHAVIOR

- Choosing the closest airport remains the leading reason for airport choice regionwide (41%), although its share has declined since 2023.
- Availability of direct/nonstop flights and service to specific markets have become increasingly important reasons for airport choice, particularly at IAD.
- BWI and DCA passengers are more likely to identify their airport as their first choice than IAD passengers.
- Convenience remains the leading reason for choosing a ground access mode, followed by cost and reliability.

NEXT STEPS

- Complete the APS General Findings Report, including updated tables, charts, and visualizations.
- Conduct geographic analysis of passenger origins and ground access patterns by Aviation Analysis Zone (AAZ).
- Prepare the APS Geographic Findings Report to support updated airport ground access forecasts.

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