



General Info No. 14

BWI Passenger Intercept Survey

Report of Key Findings



Overview of Methodology

WHERE?



BWI Airport

HOW MANY?



$n = 417$

Margin of Error $\pm 5\%$
at 95% Confidence Level

WHEN?



Q2 2023
10 Day Period

WHO?



Departing Passengers
Waiting at Gates

HOW?



Passenger Intercept
Survey via Electronic
Tablet with Programmed
Skip Logical and Branching

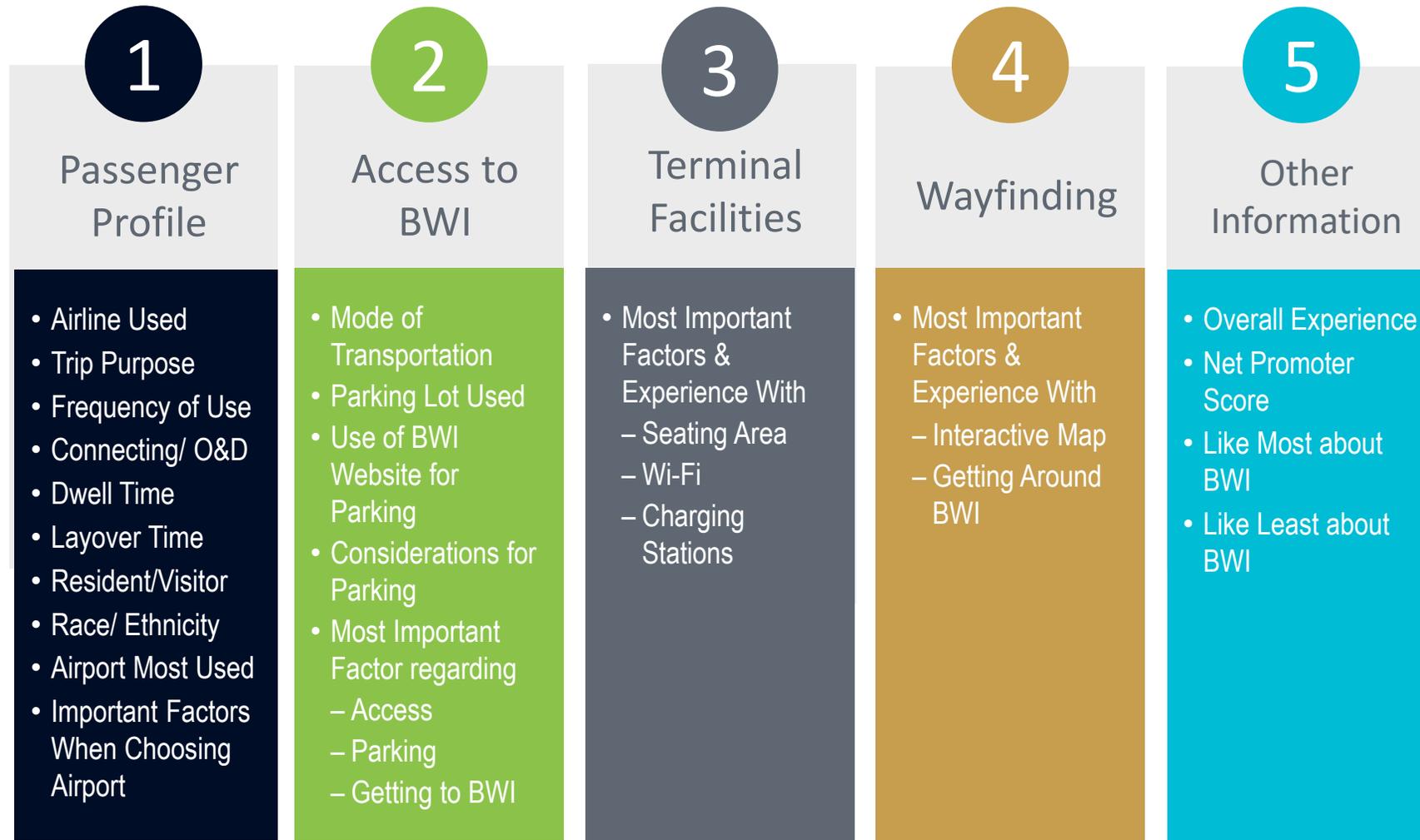
APPROACH?



Stratified Random
Sampling Approach based
on Airline Market Share



Topics Covered



Experience Ratings



Excellent -5



Very Good-4



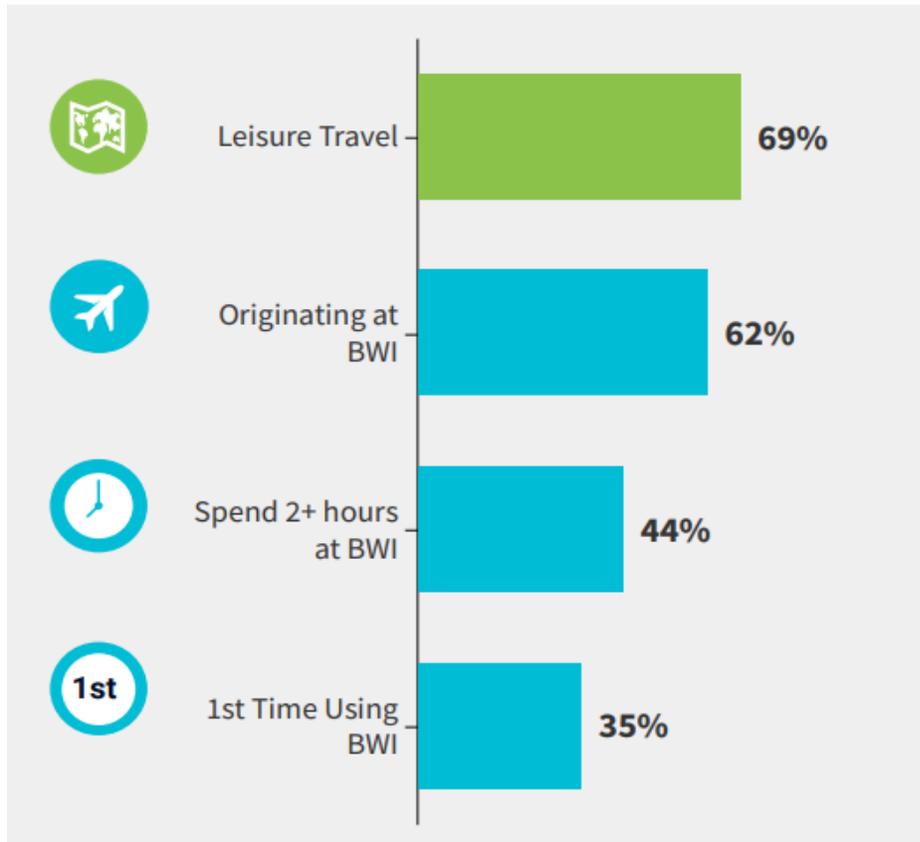
Good-3



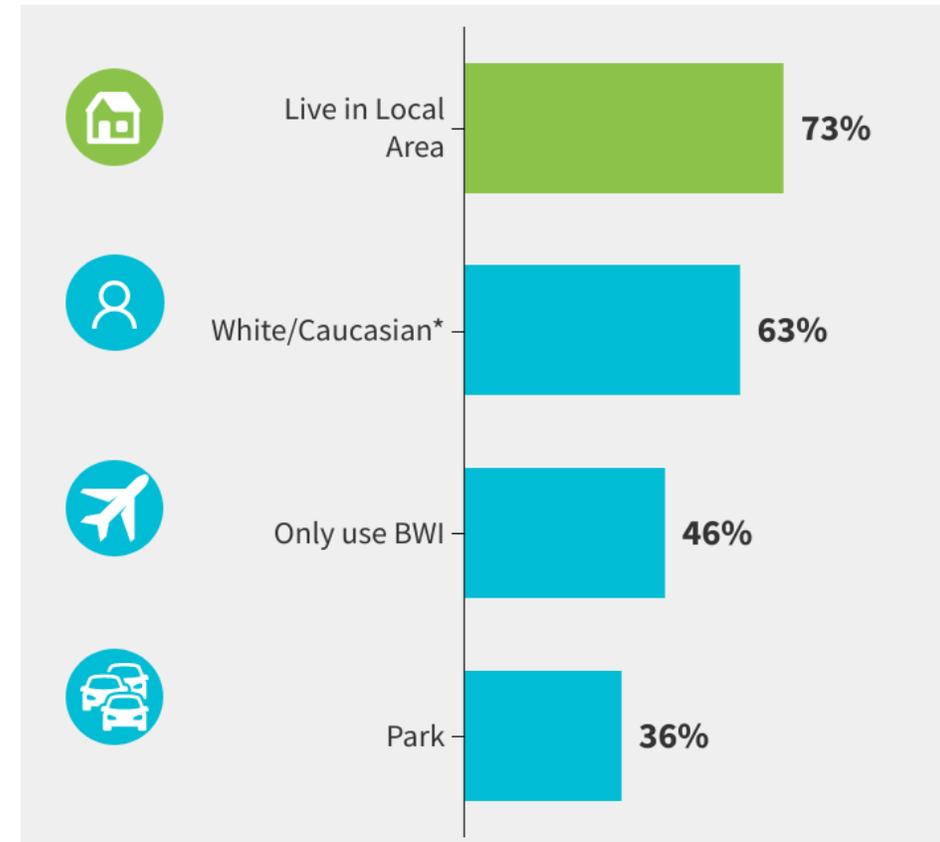
Fair/Poor-2/1

Passenger Highlights

Demographic & Travel Characteristics



Originating Passengers



*Represents self reported data by local residents

Passenger Highlights (cont.)

Passengers find convenience and comfort most important

Factors important to the passenger experience:

Selecting an Airport (local residents)

- Non-stop flights
- Distance/time getting to airport
- Airfare

Choosing parking lot

- Price
- Close to terminal
- Ease of getting in/out

Experience at Gate Area

- Availability of seats
- Cleanliness
- Restrooms are close by

Getting around BWI

- Clear signs
- Availability of FIDs
- Staff to direct me/ answer questions



Using Technology

The majority of passengers are not using the technology features offered by BWI



Use Charging Outlet 29%



Use Wi-Fi 29%



Use Website to Monitor Parking 14%



Use Interactive Map 6%

Like LEAST:

- ✓ Crowded gate seating
- ✓ Charging stations/ outlets
- ✓ Cleanliness

Like MOST- ease of:

- ✓ Checking-in
- ✓ Getting around
- ✓ Security screening

Experience at BWI



*Originating passengers

1

Net Promoter Score
4.32



90% would likely or very likely recommend BWI to others

Survey Methodology



Minimized duplication of past and current survey efforts

Developed a customized questionnaire to:

- Gather information regarding profiles
- Assess passenger experience



Administered surveys

- Used a stratified random sampling approach by airline market share
- Used interactive electronic tablet to departing passengers waiting in the gate areas
- Shared the electronic tablet with passengers so each questionnaire is carefully reviewed, which helps eliminate respondent error more commonly found in self-administered surveys



Obtained a snapshot of BWI's passenger market

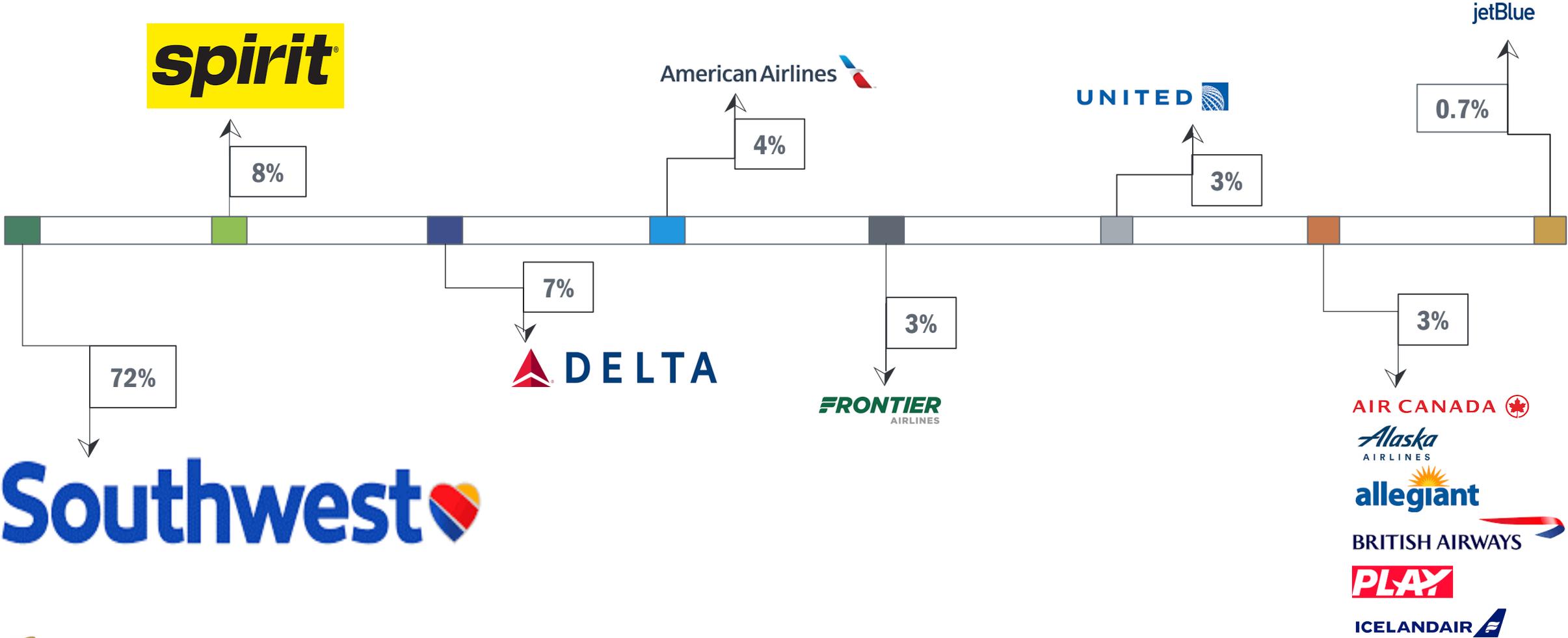
- Conducted during a consecutive 10-day period
- Over 400 surveys were collected, representing a statistically valid sample with a margin of error of no greater than $\pm 5\%$ at a 95% confidence level
- Note, caution should be used when reviewing sub-groups with smaller sample sizes



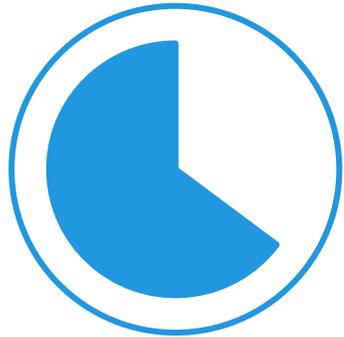
Reviewed, cleaned, and analyzed survey data

- Determined that comparisons with past survey findings will not be insightful considering variances in methodology (such as wording of the questions and seasonality of when surveys were administered)
- Determined survey can serve as a baseline for future comparative analysis

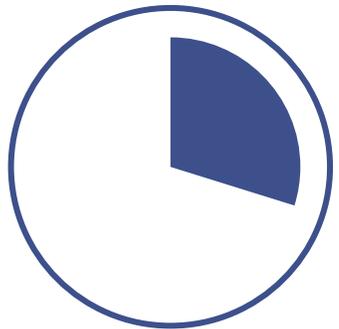
Survey Sample: Airline Market Share



Purpose of Travel



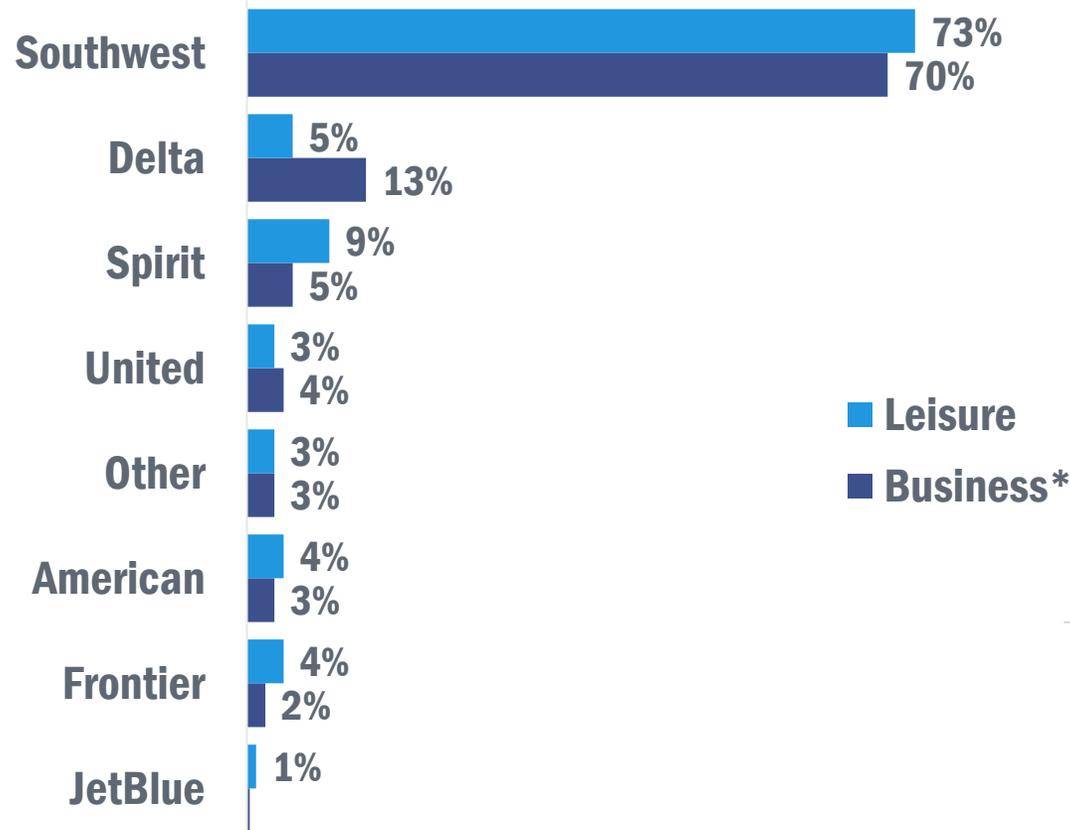
69%
Leisure



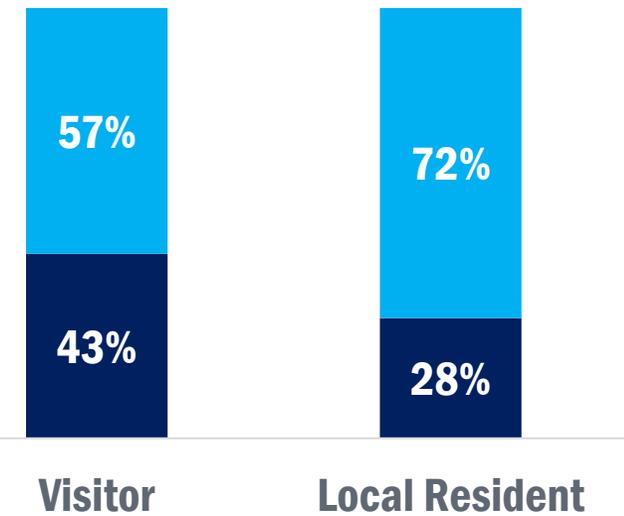
31%
Business*

*n = 416. Business includes those who traveled exclusively for business and a combination of business and leisure

By Airline



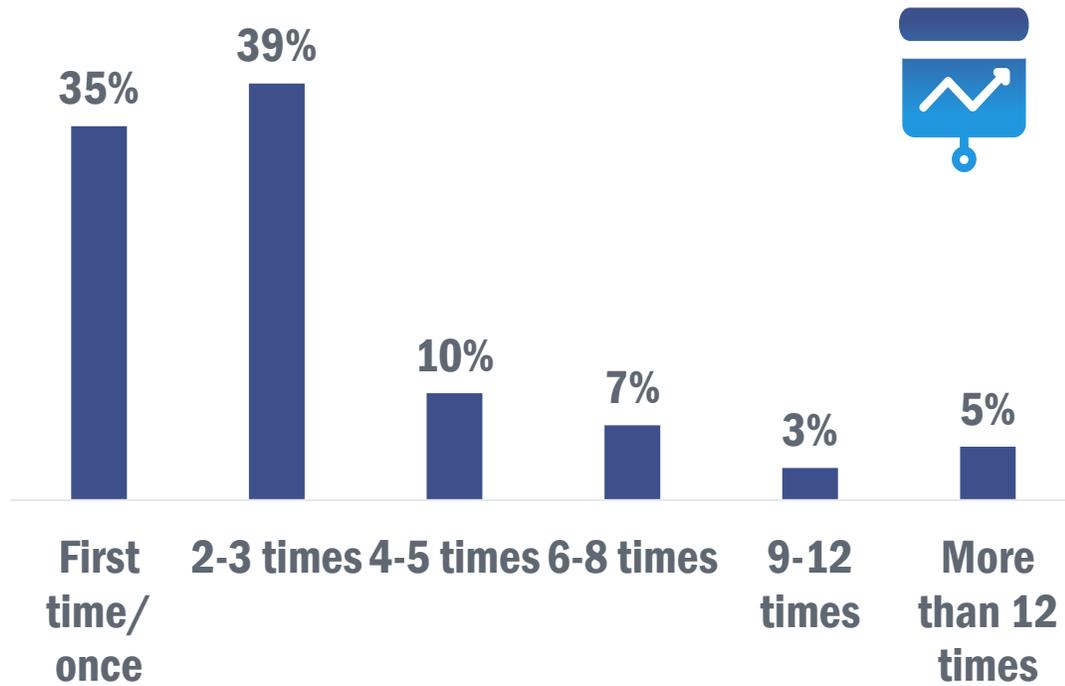
Visitors & Residents



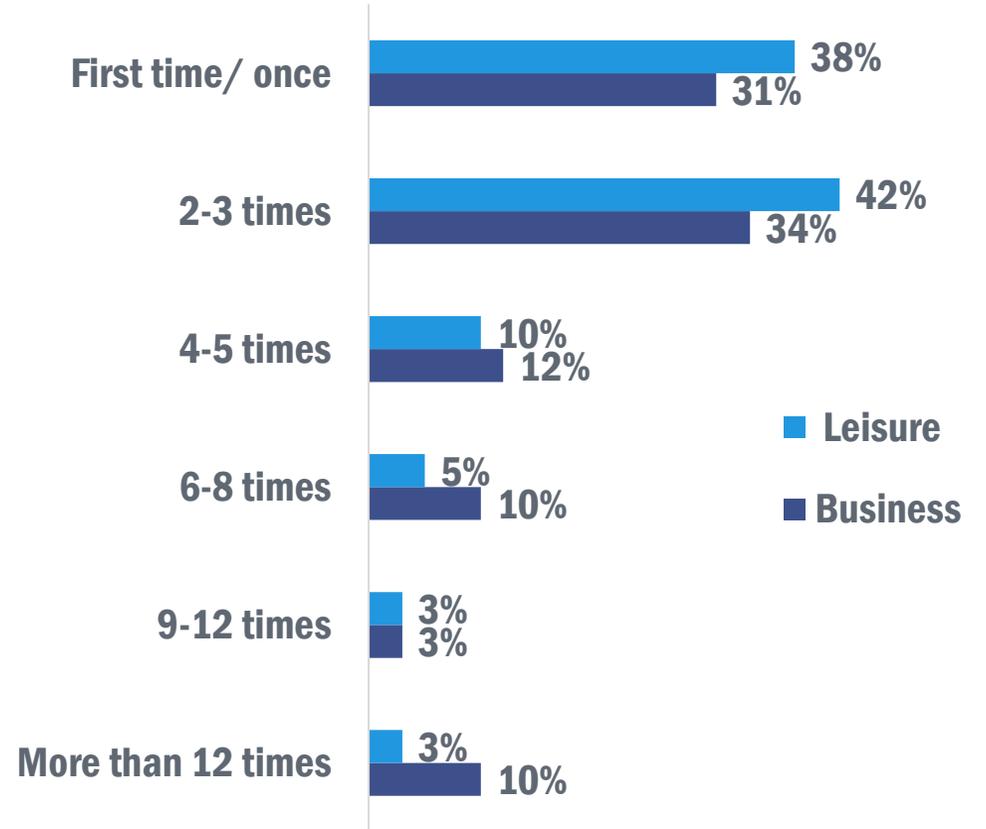
*O & D.

*Local residents defined as living in the catchment zone, visitors are all others.

Frequency of Use

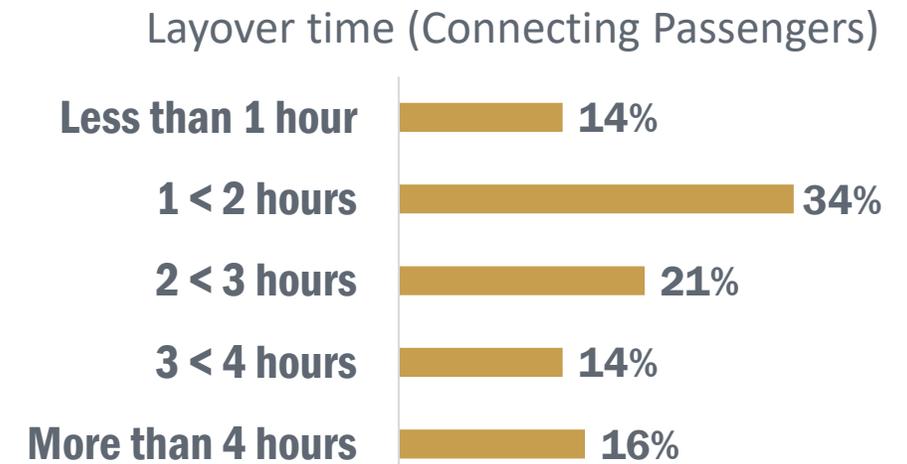
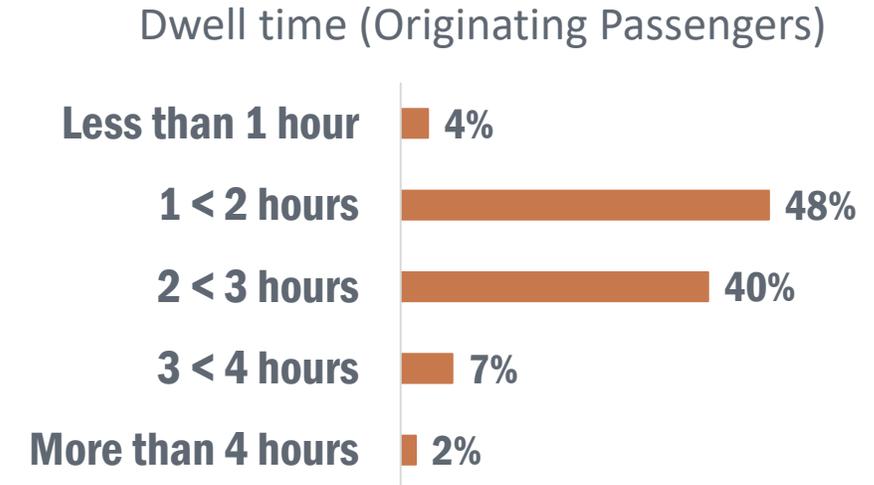


n = 407



n = 407

Travel Characteristics



Passenger Profile

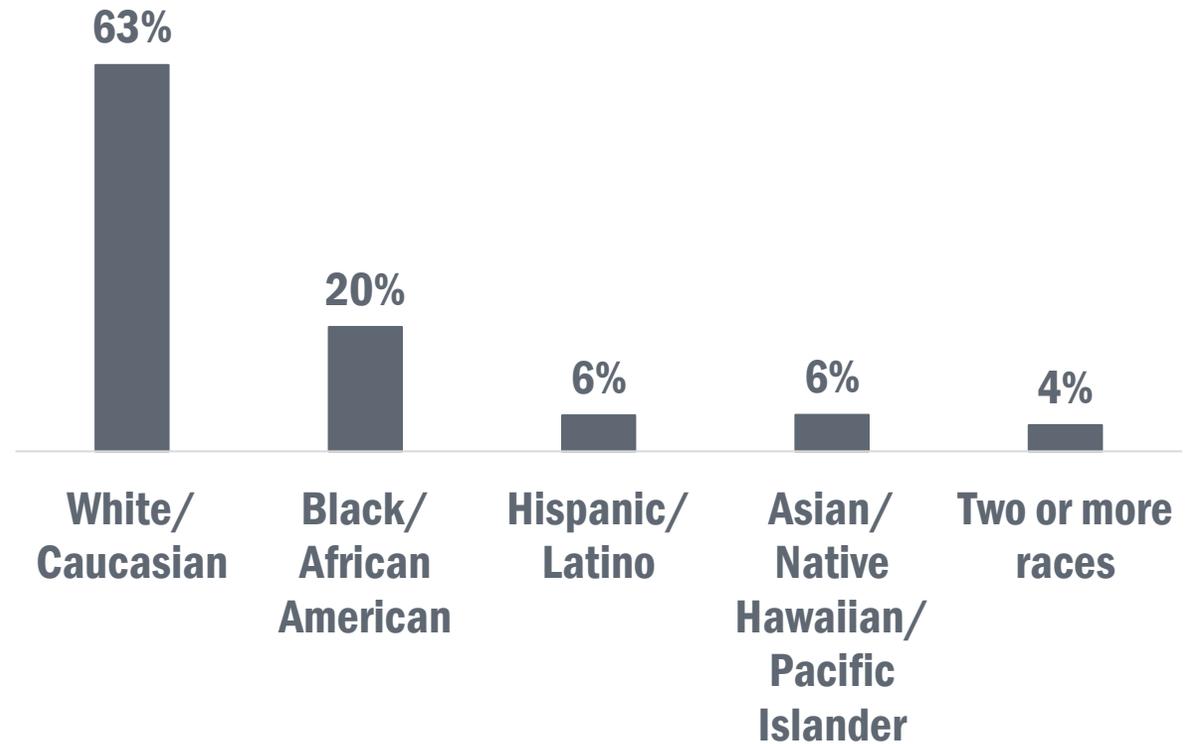
Q. Do you live in Maryland, Virginia, DC, Delaware, or Pennsylvania?



27%
Visitor

n = 256

Local Residents*
(Race/Ethnic Composition)

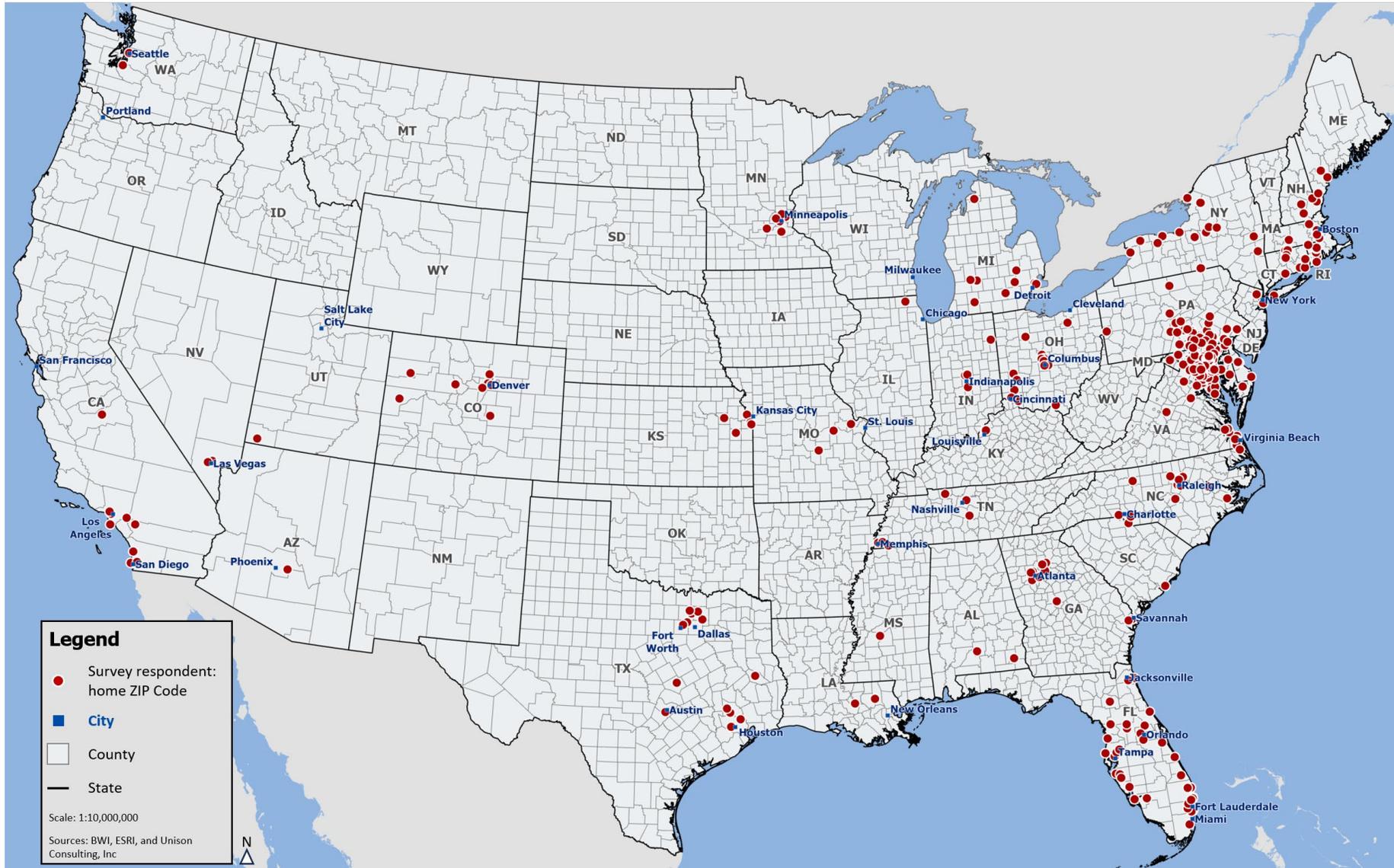


*Represents self reported data by local residents

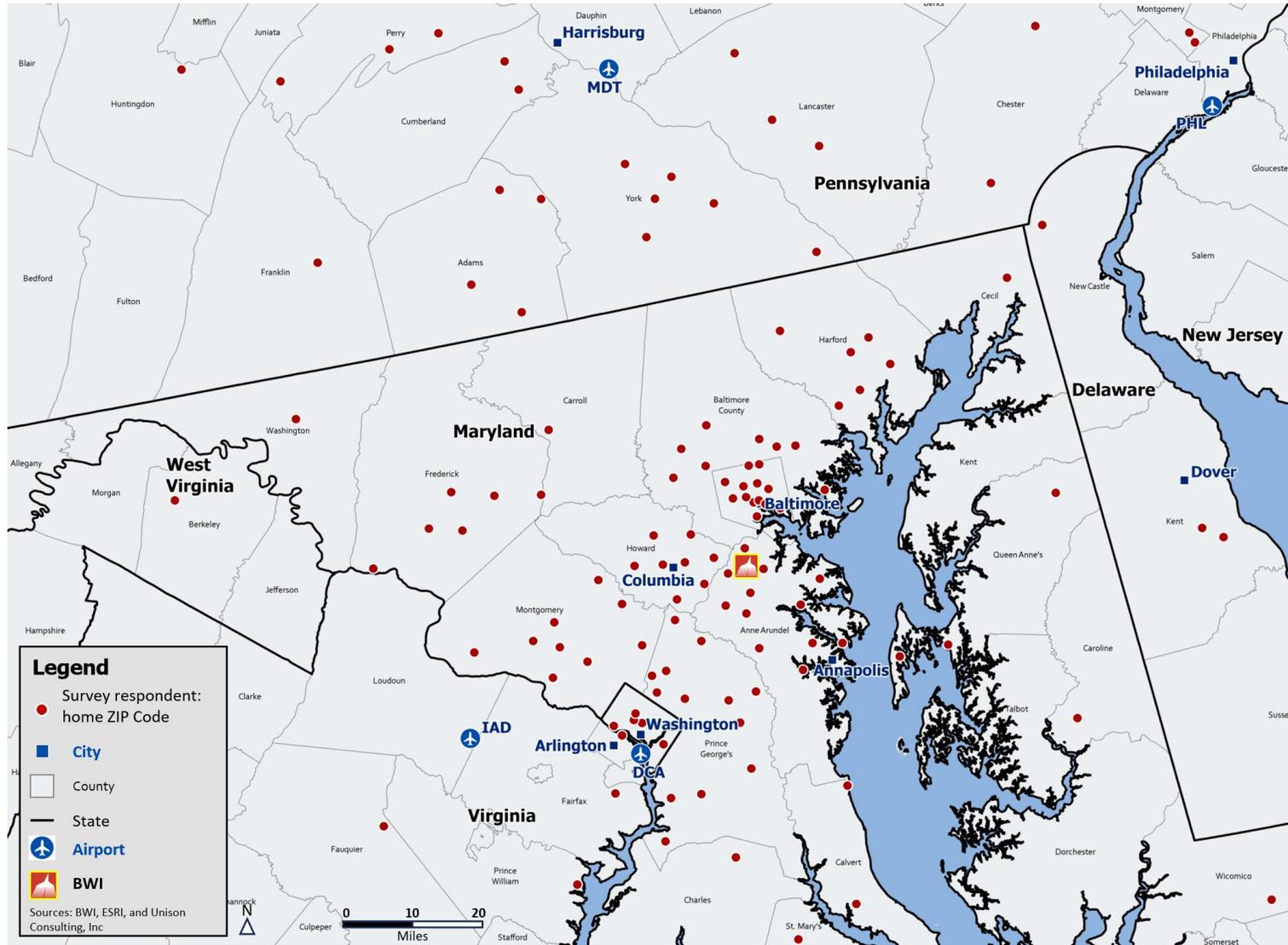
n = 186

Primary Residence

Q. What is your home zip code?



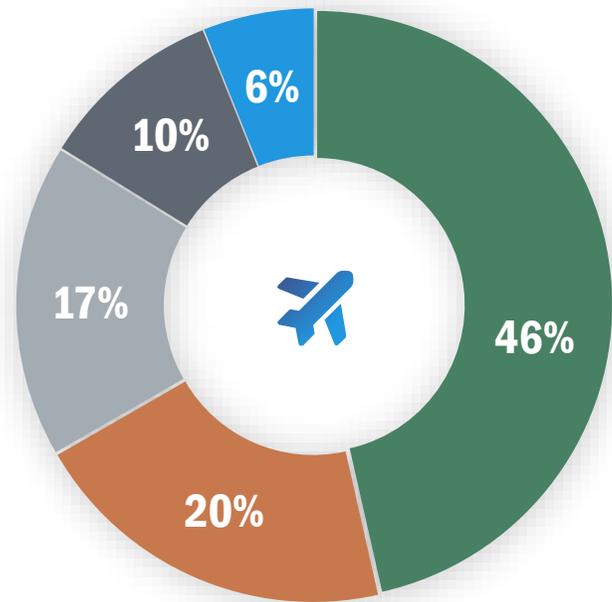
Local Area Residents



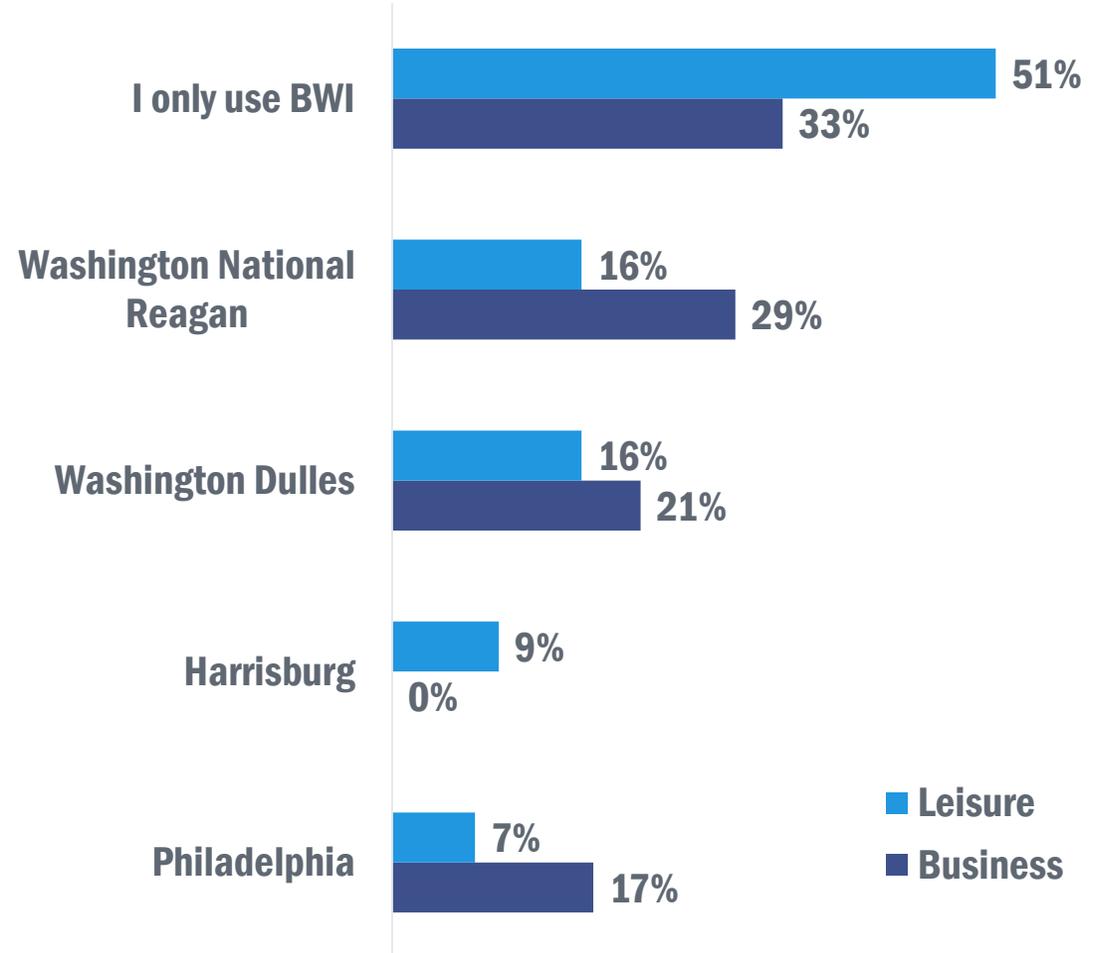
Airport Used Most

Local Residents

Q. Aside from BWI, what airport do you use most often?



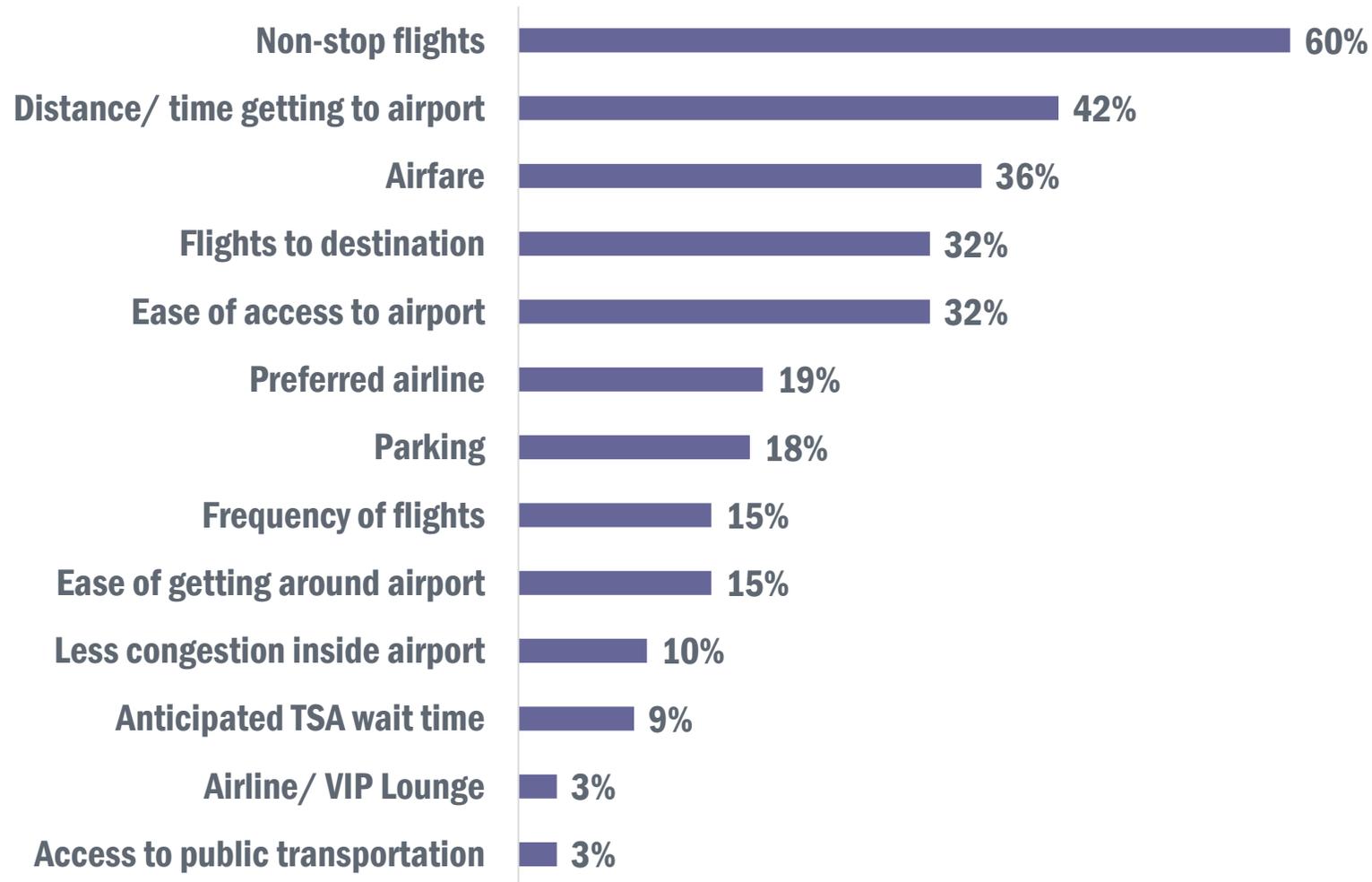
- I only use BWI
- Washington National Reagan
- Washington Dulles
- Philadelphia
- Harrisburg



- Leisure
- Business

Considerations When Choosing an Airport

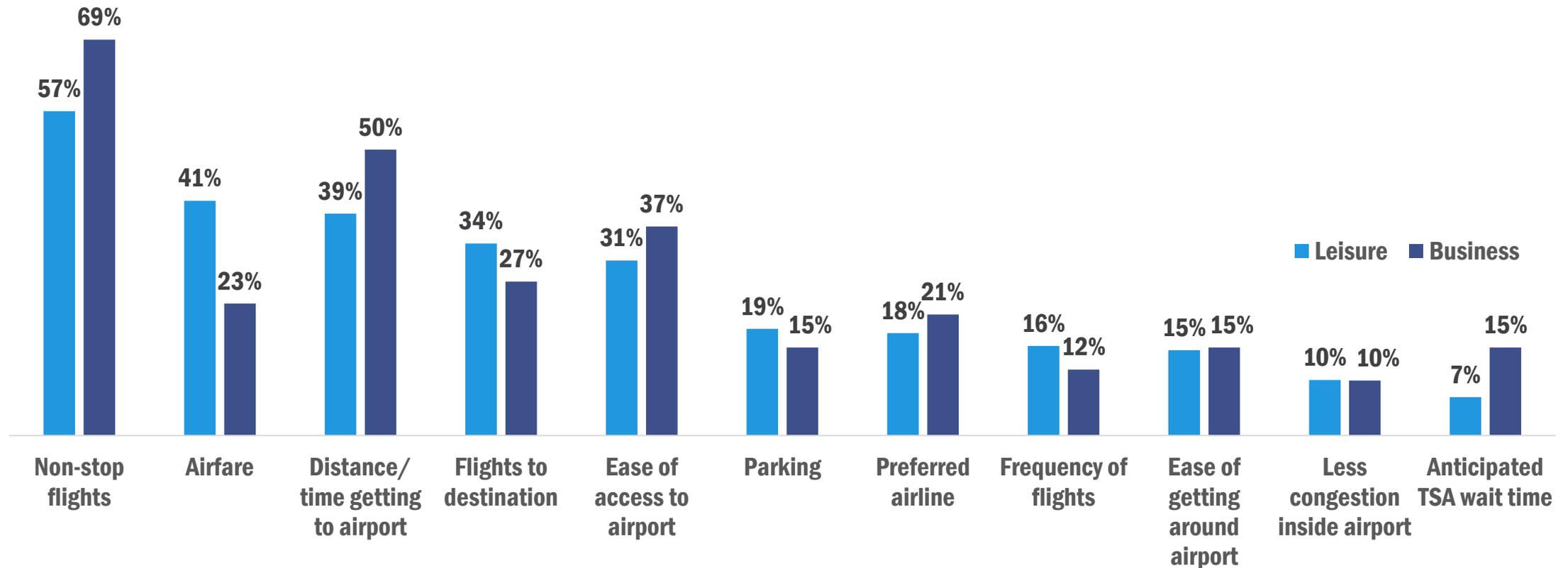
Local Residents - Most important factors considered when choosing an airport



Considerations When Choosing an Airport

Local Residents

Most important factors considered when choosing an airport*

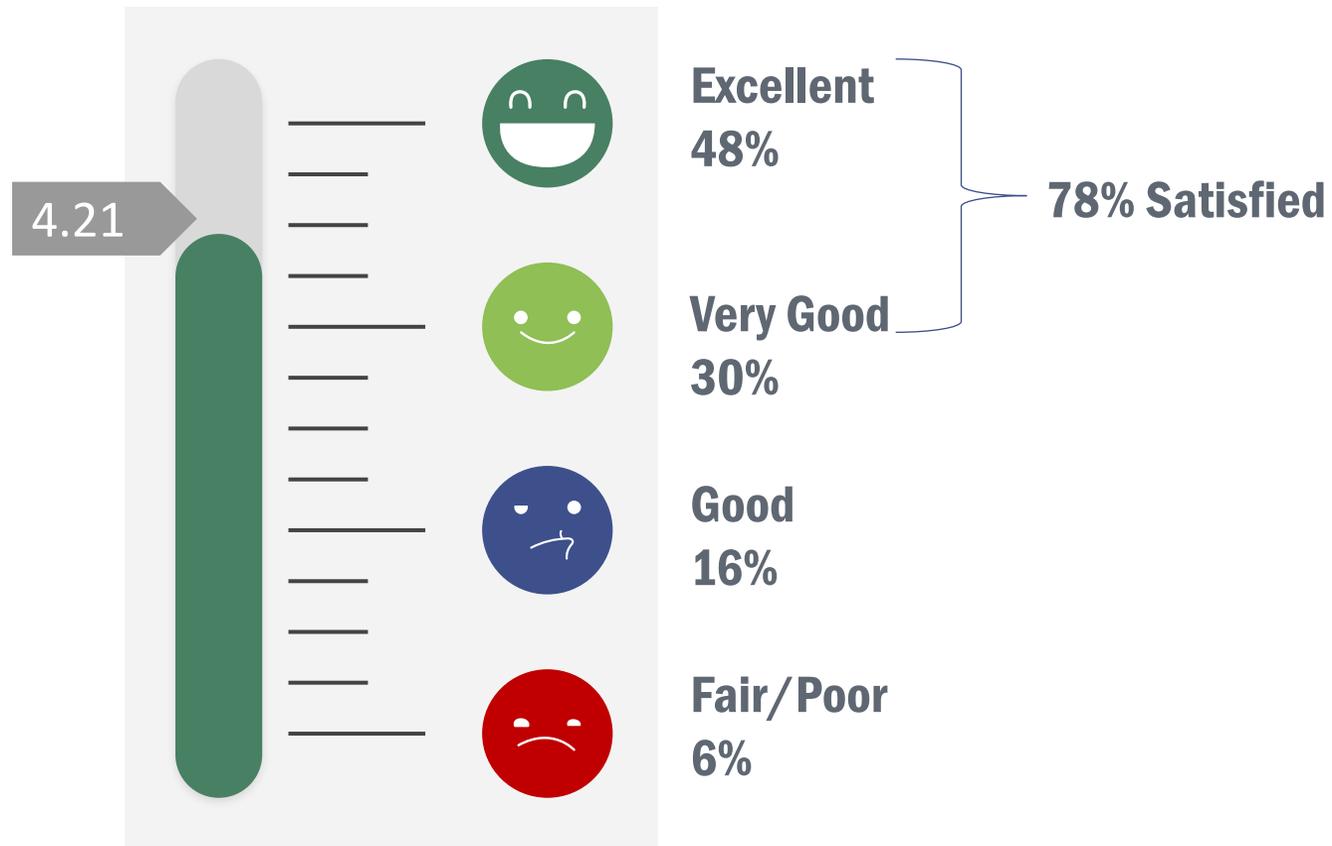


* Access to public transportation and airline VIP lounge = <5% for leisure and business travelers

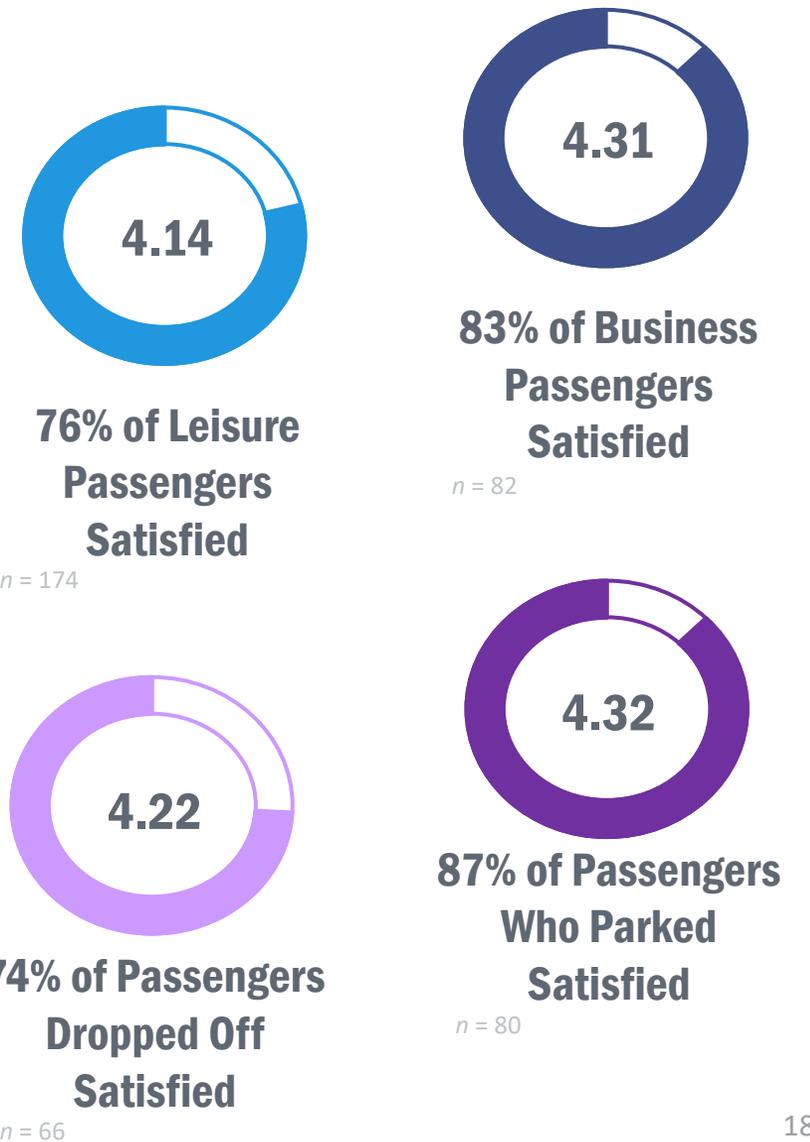
n = 186

Overall Access to BWI

Originating Passengers



n = 256



n = 174

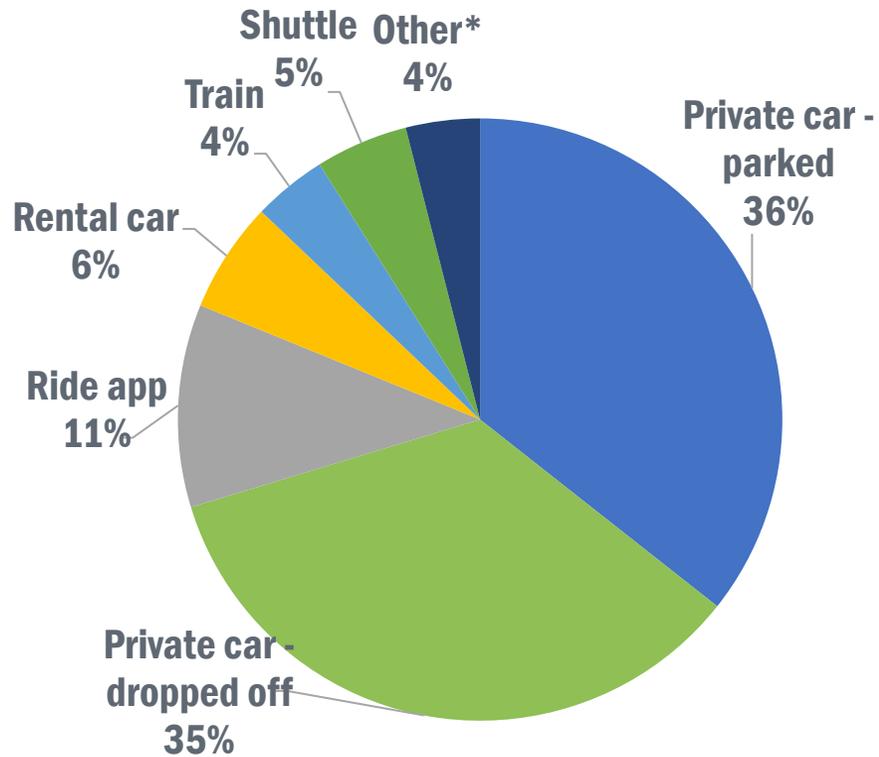
n = 82

n = 66

n = 80

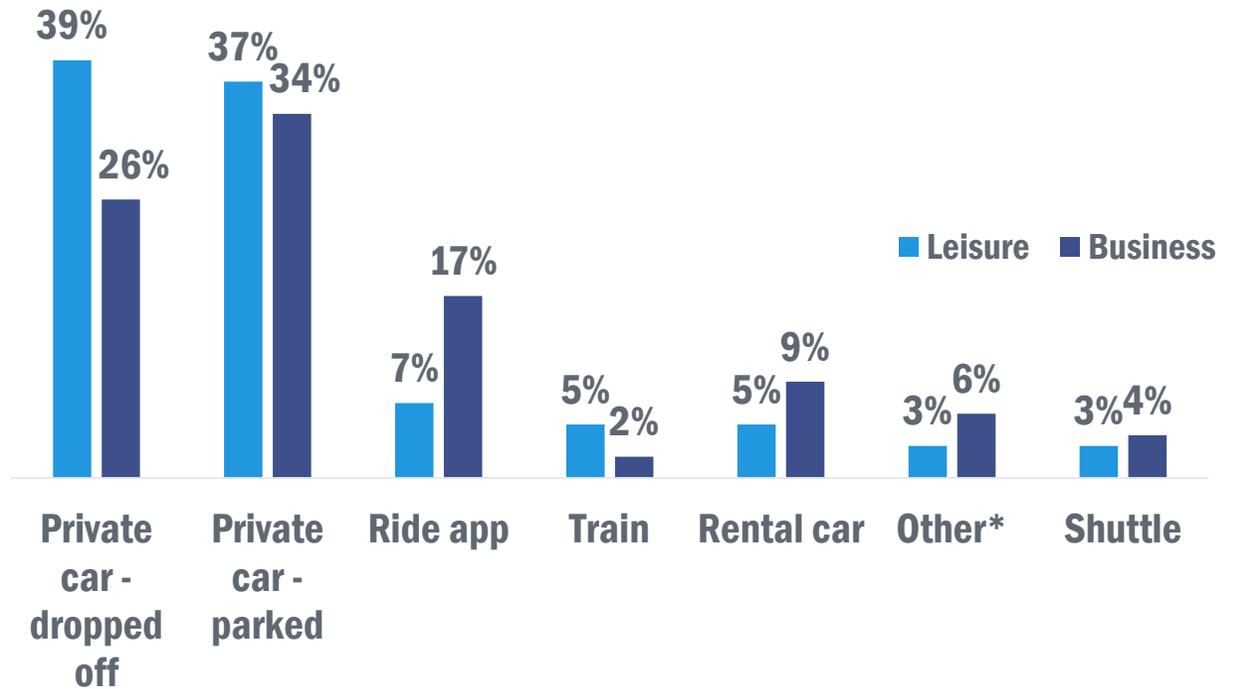
Mode of Transportation

Originating Passengers



* Other includes taxi, limo/car service

n = 256

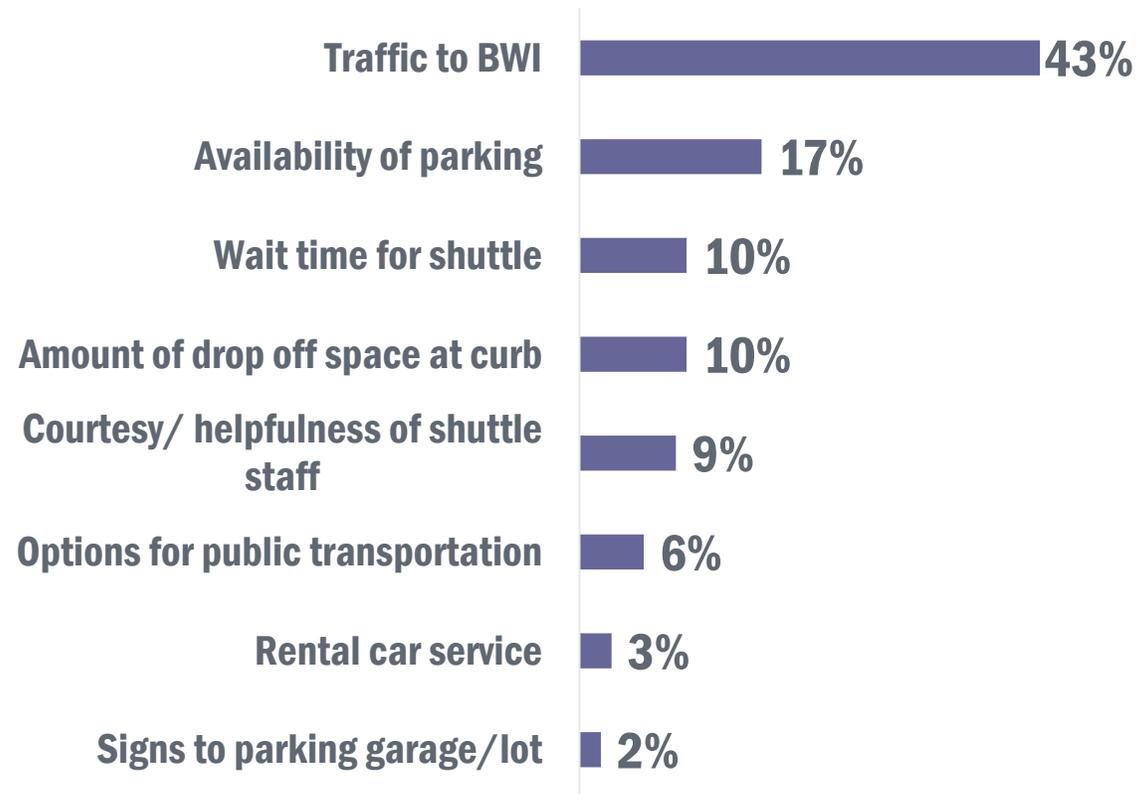


n = 252

Access to BWI – Most Important Factor

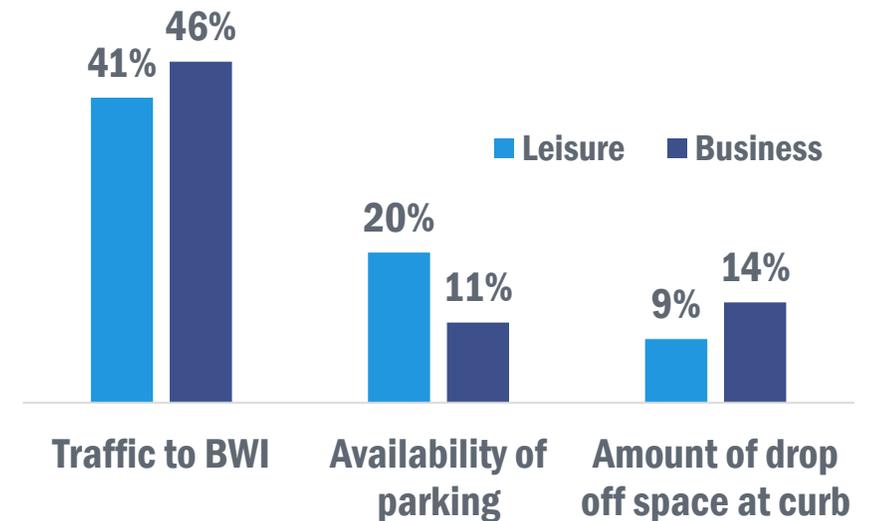
Originating Passengers

Q. What is most important to your experience with getting to BWI?



n = 256

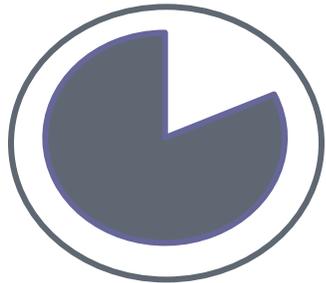
Top Responses – Leisure vs. Business



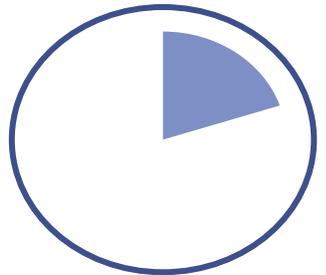
n = 252

Parking at BWI

Originating Passengers



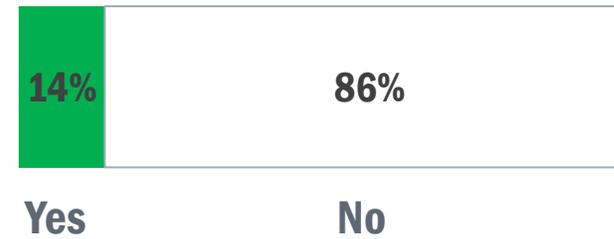
80%
BWI Garage/Lot



20%
Off-Airport Lot

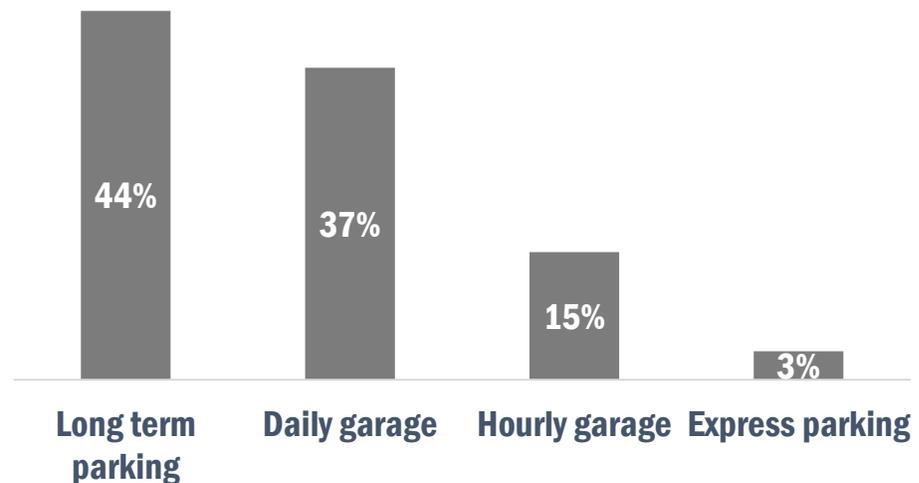
n=92

Q. Did you use the BWI website to decide where to park?



n=92

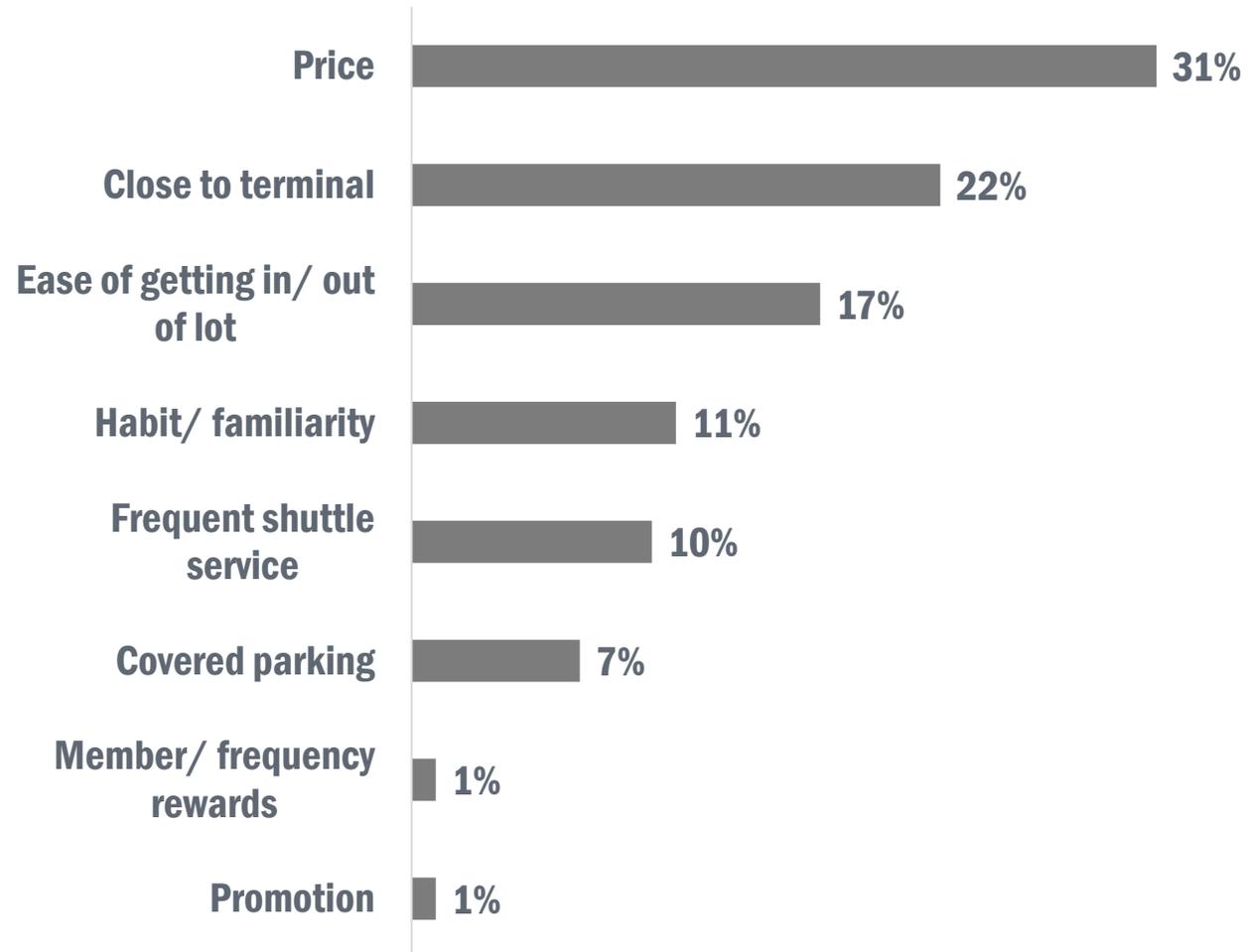
Q. Where did you park?



n=92

Reason for Parking Choice

Originating Passengers



*n=92. All respondents who parked: on and off airport lots.

Satisfaction with Parking*

Originating Passengers

Driving through Garage



83%

Satisfied

n = 30

Parking Signs



77%

Satisfied

n = 30

Info about Available Spaces



77%

Satisfied

n = 30

Signs to Parking



71%

Satisfied

n = 28

Space Availability



64%

Satisfied

n = 28

Signs for Shuttle



64%

Satisfied

n = 27

Driver Courtesy

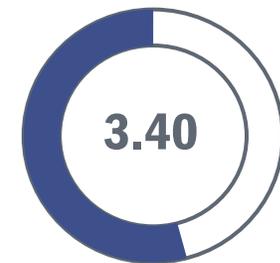


56%

Satisfied

n = 25

Shuttle Frequency

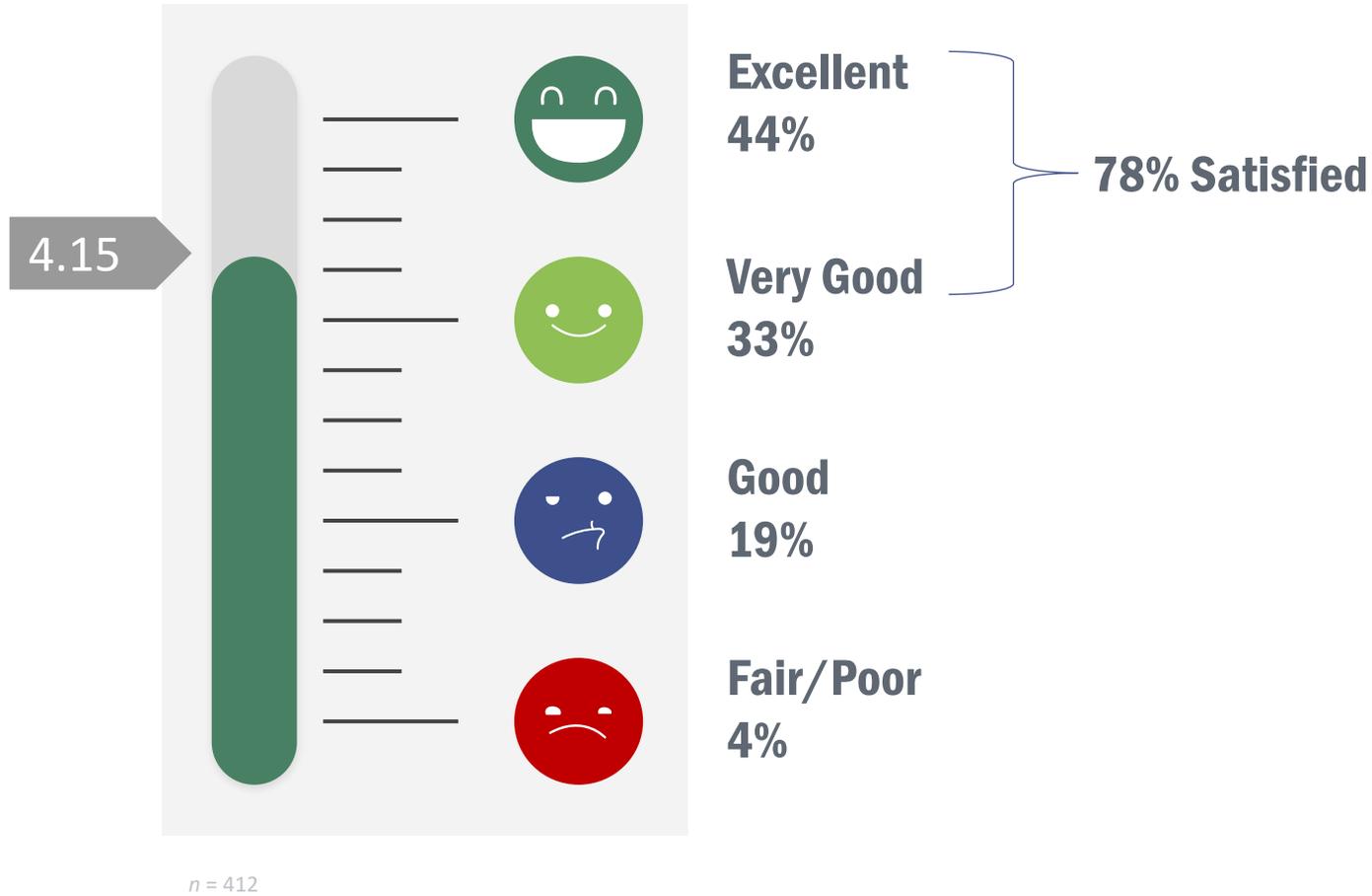


46%

Satisfied

n = 27

Overall Satisfaction with Gate Area



Clear Gate Signs



Cleanliness



Restrooms Nearby

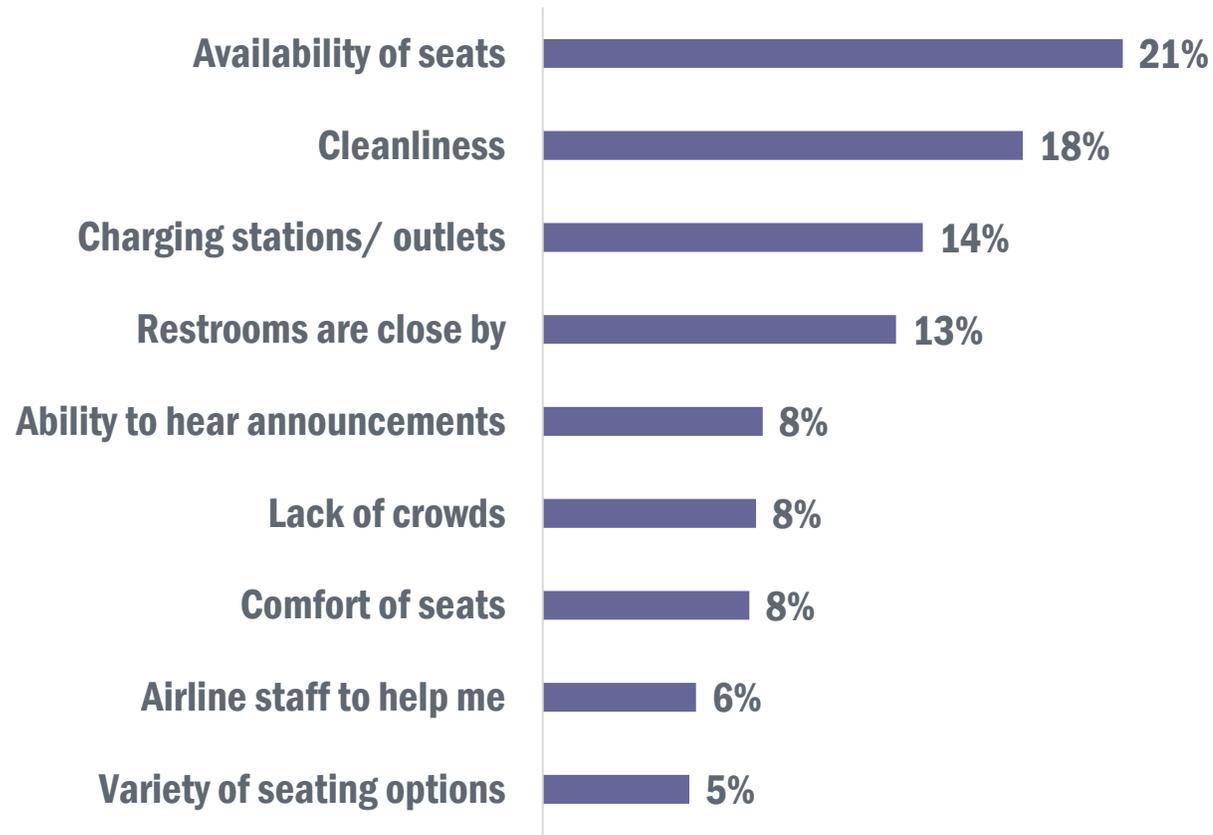


Trash/ Recycling Nearby

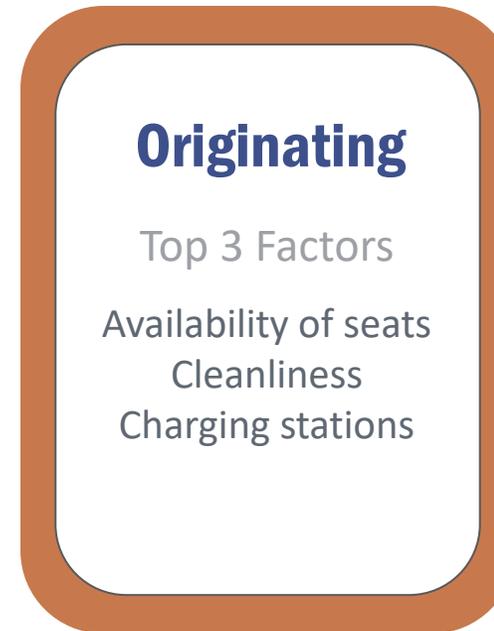


Most Important Factors: Gate Area

Q. What is most important to your experience with the gate areas?



n = 416

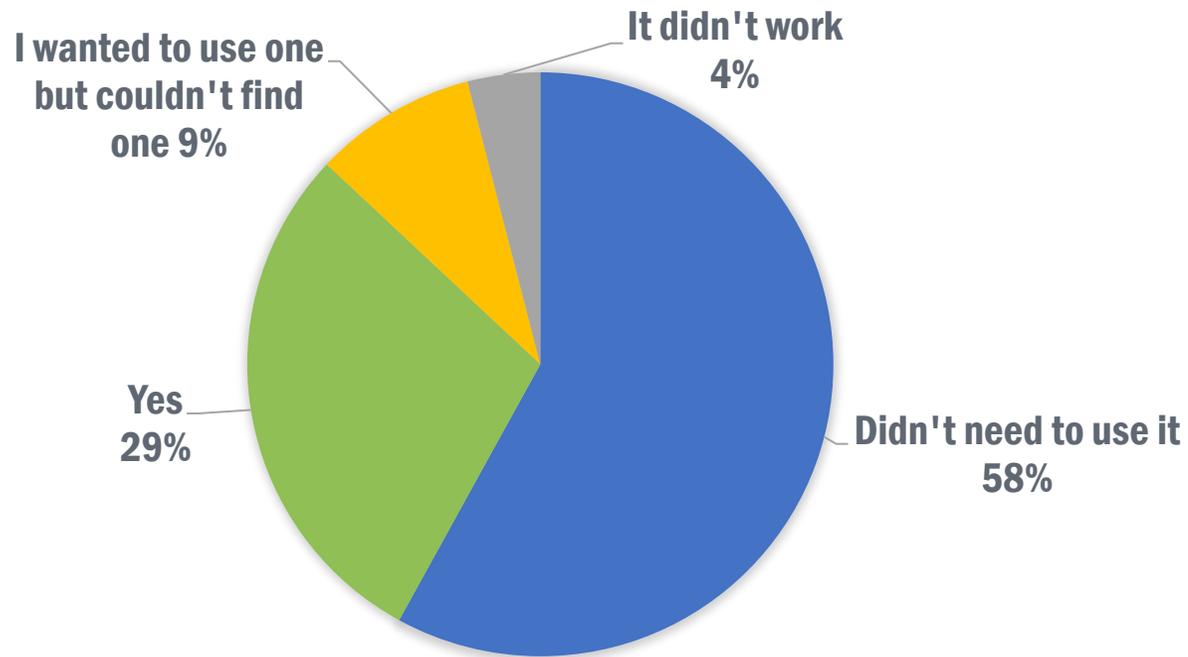


n = 416



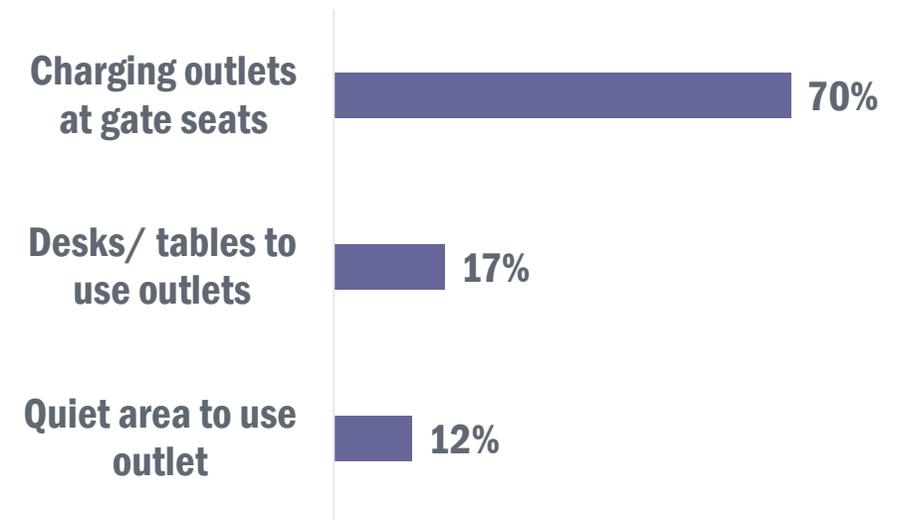
Charging Station/ Outlet Use

Q. Did you use a charging station/ outlet?



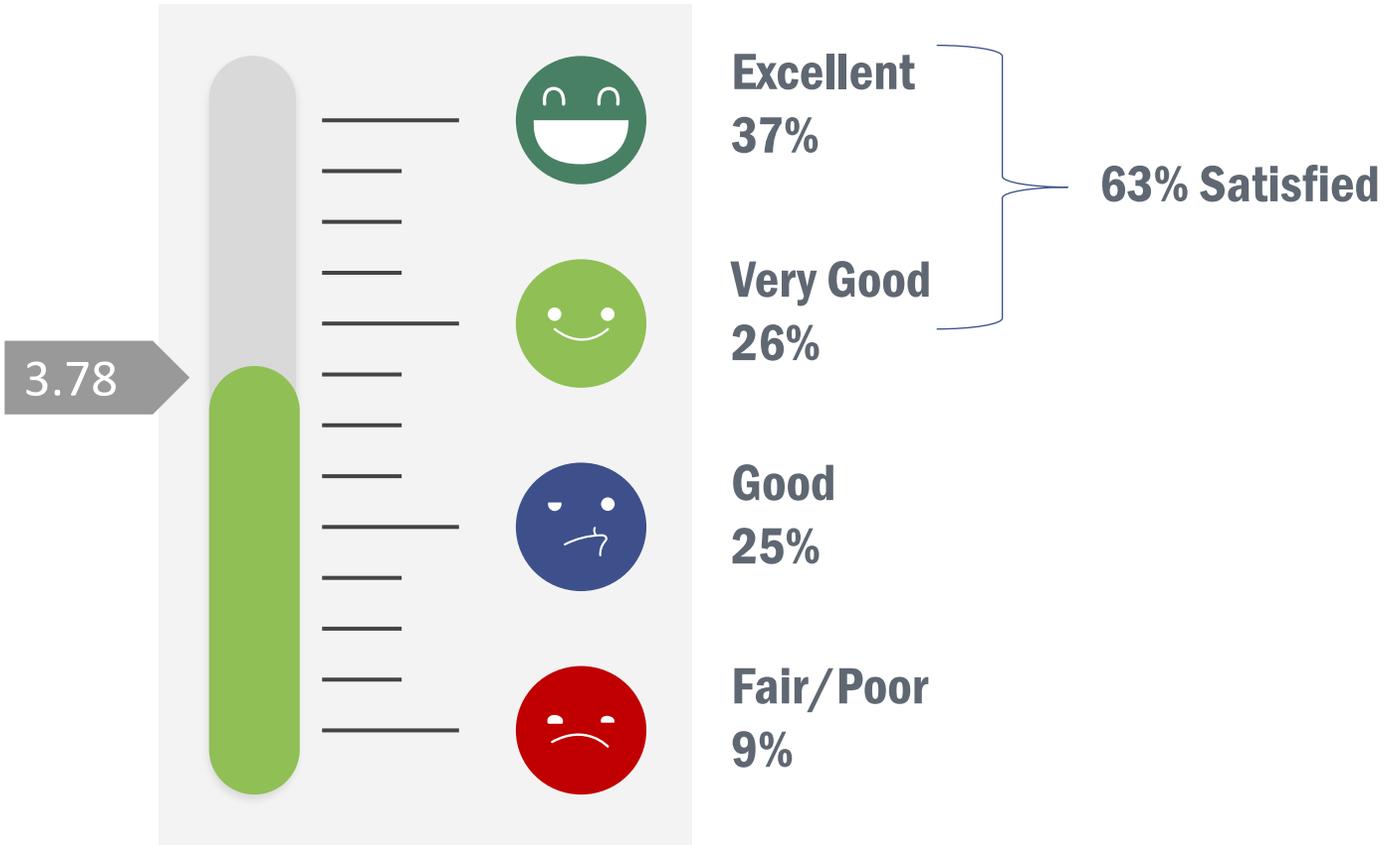
n = 416

Q. What is most important to your experience with using the charging station/ outlet?



n = 121

Overall Satisfaction with Charging Stations/ Outlets



n = 118

Charging Availability



n = 119

Charging Locations



n = 117

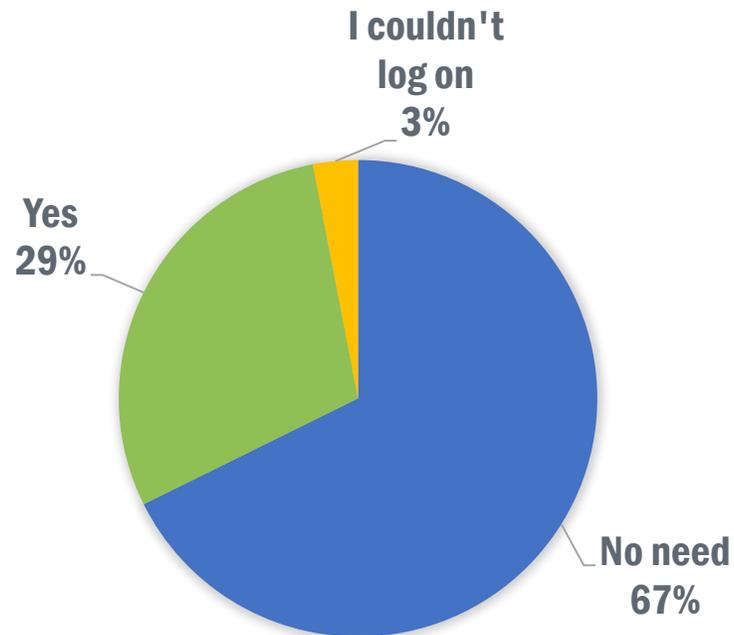
Charging Options



n = 116

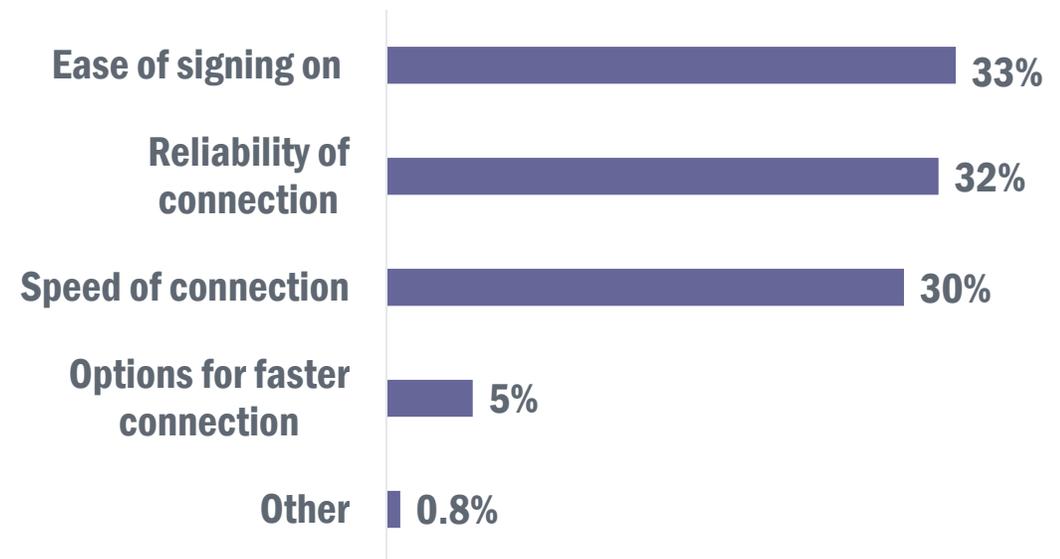
Wi-Fi Use

Q. Did you use the Airport's Wi-Fi today?



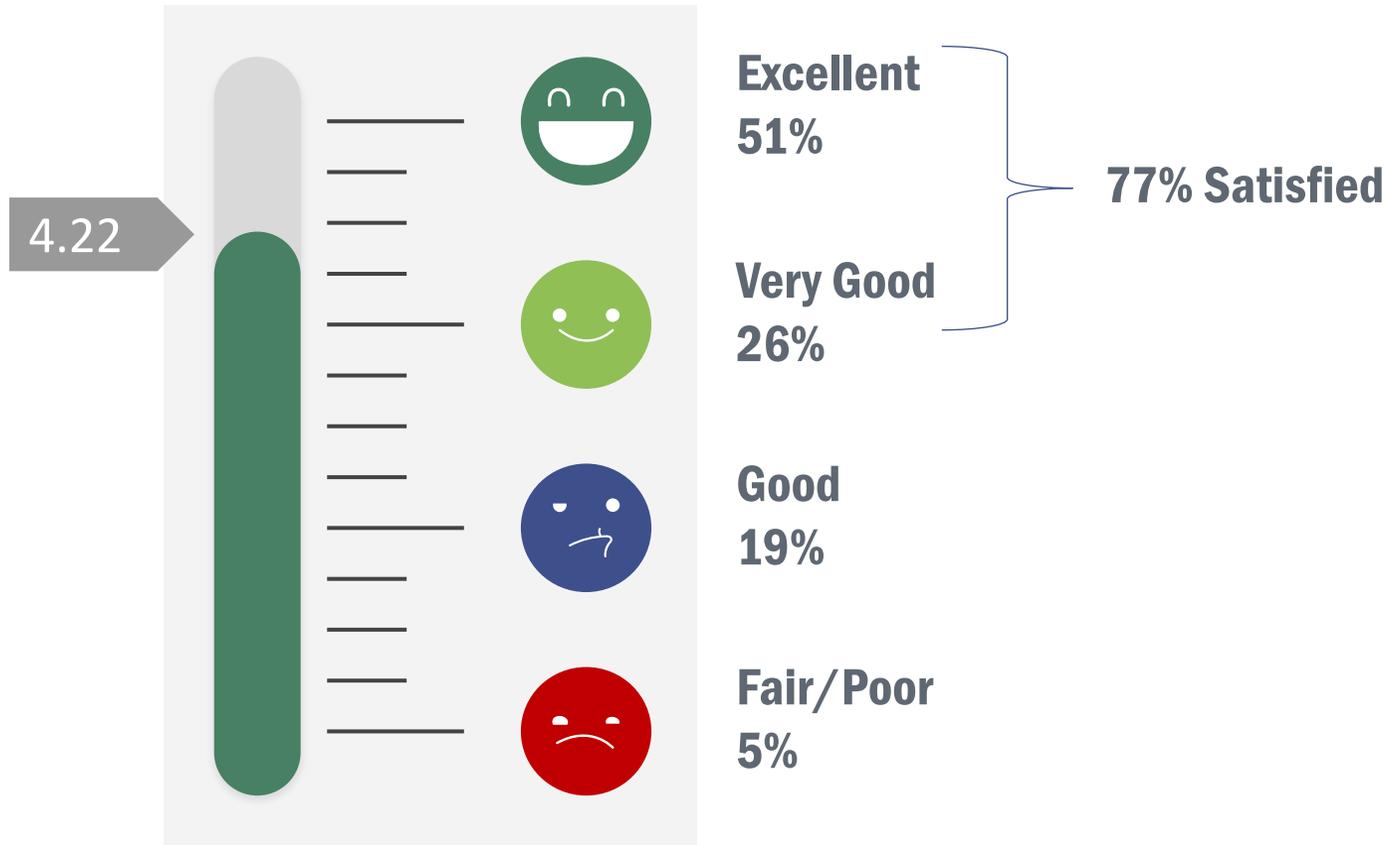
n = 416

Q. What is most important to your experience with using the Airport's Wi-Fi?



n = 122

Overall Satisfaction with Wi-Fi



n = 121

Ease of Sign On



n = 121

Speed of Connection



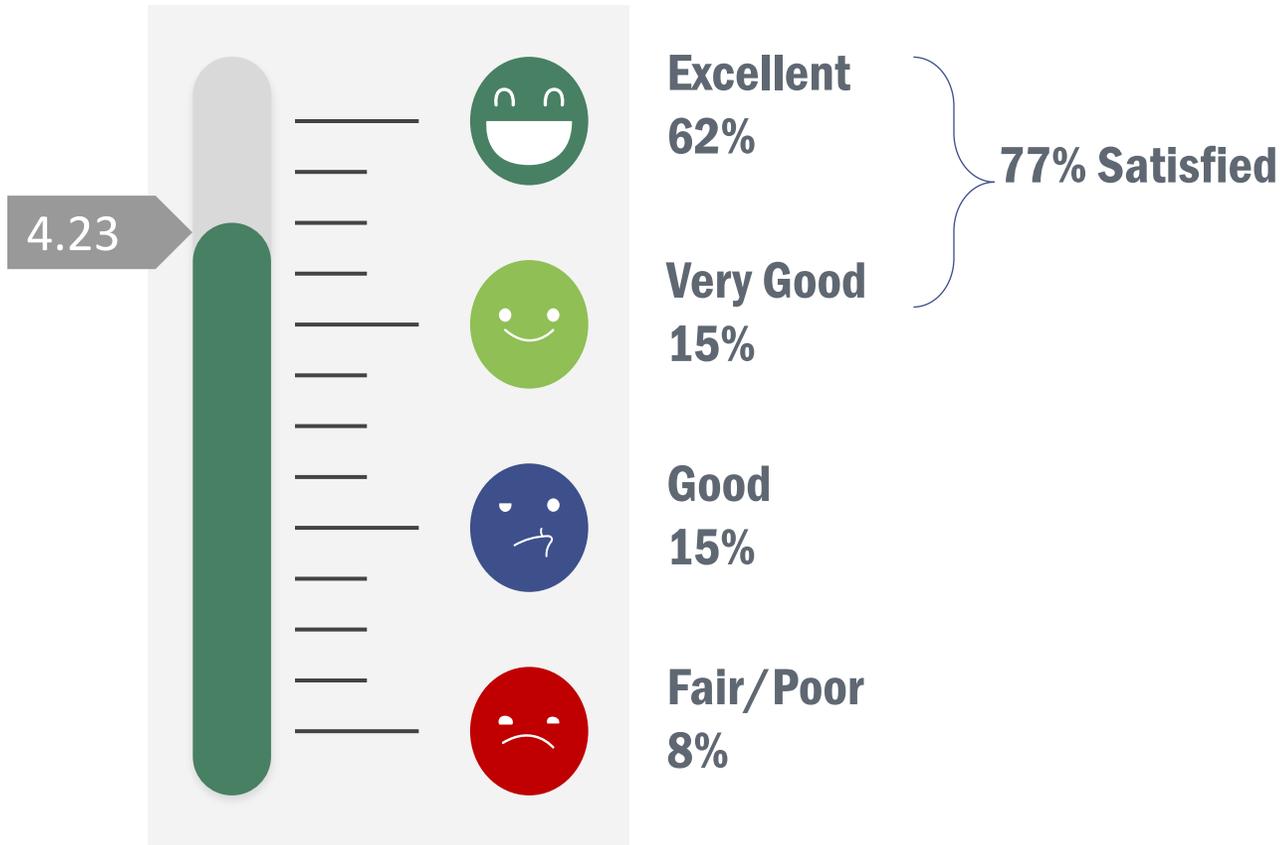
n = 120

Reliability of Connection



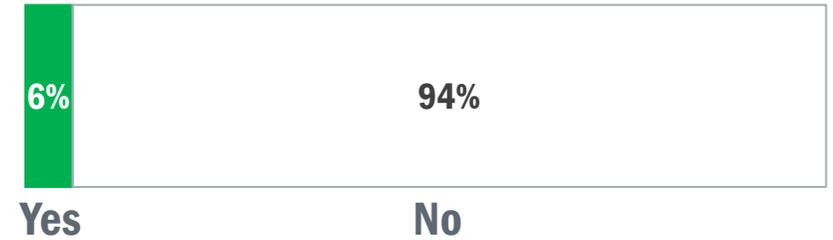
n = 119

Overall Satisfaction with Interactive Map



n = 26

Q. Did you use the Interactive Map?



n = 416

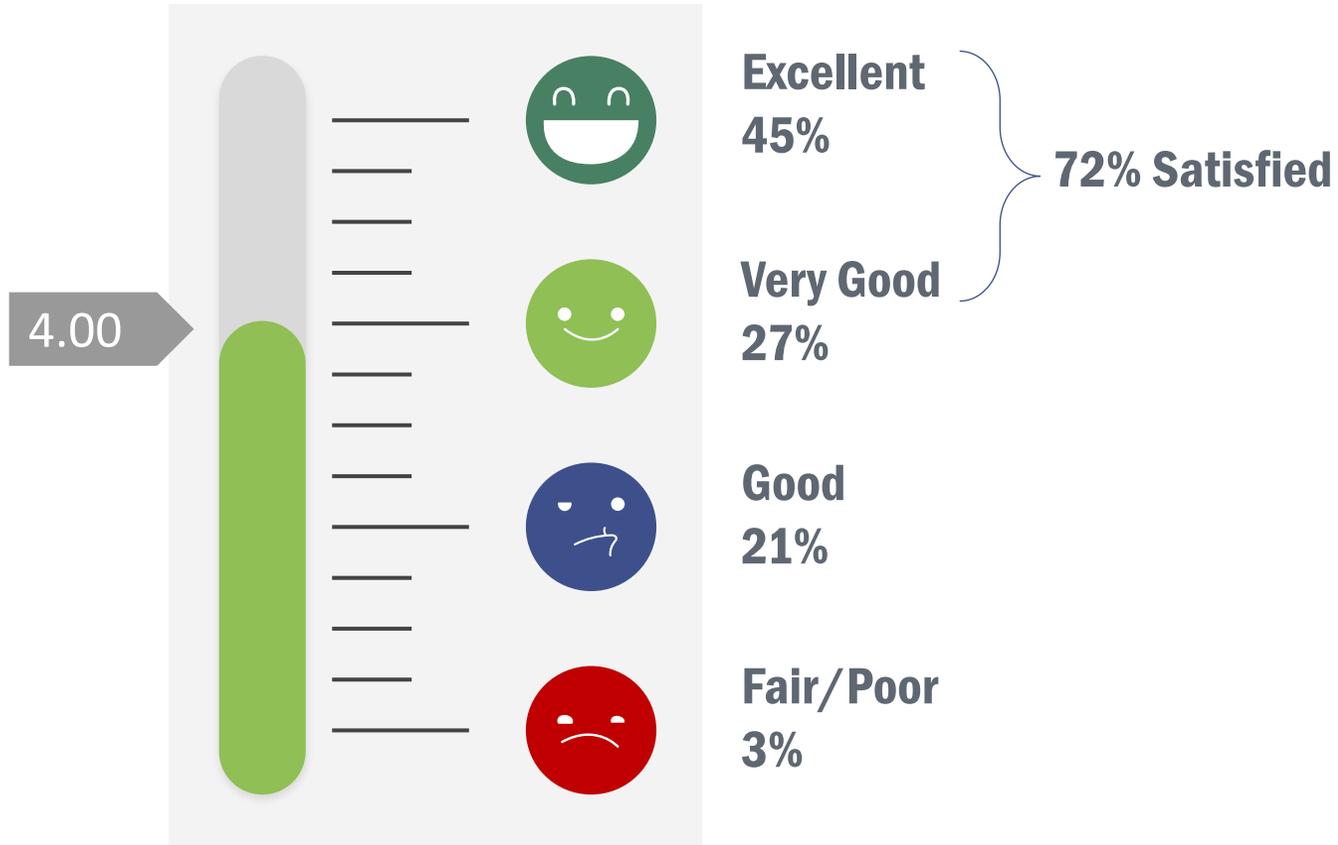
Accuracy of Information



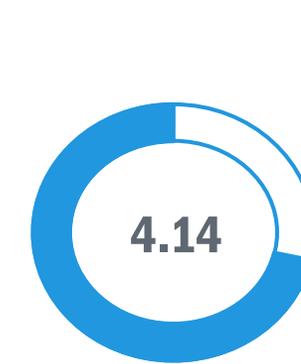
73% Satisfied

n = 26

Overall Satisfaction with Getting Around BWI



n = 397



73% of Leisure Passengers Satisfied

n = 283



75% of Originating Passengers Satisfied

n = 251



77% of Business Passengers Satisfied

n = 124



84% of Connecting Passengers Satisfied

n = 156

Getting Around BWI

Q: Rate your satisfaction in the following areas:

Directional Signs



74%
Satisfied n = 391

Flight Information Displays



69%
Satisfied n = 384

Maps/ Directories



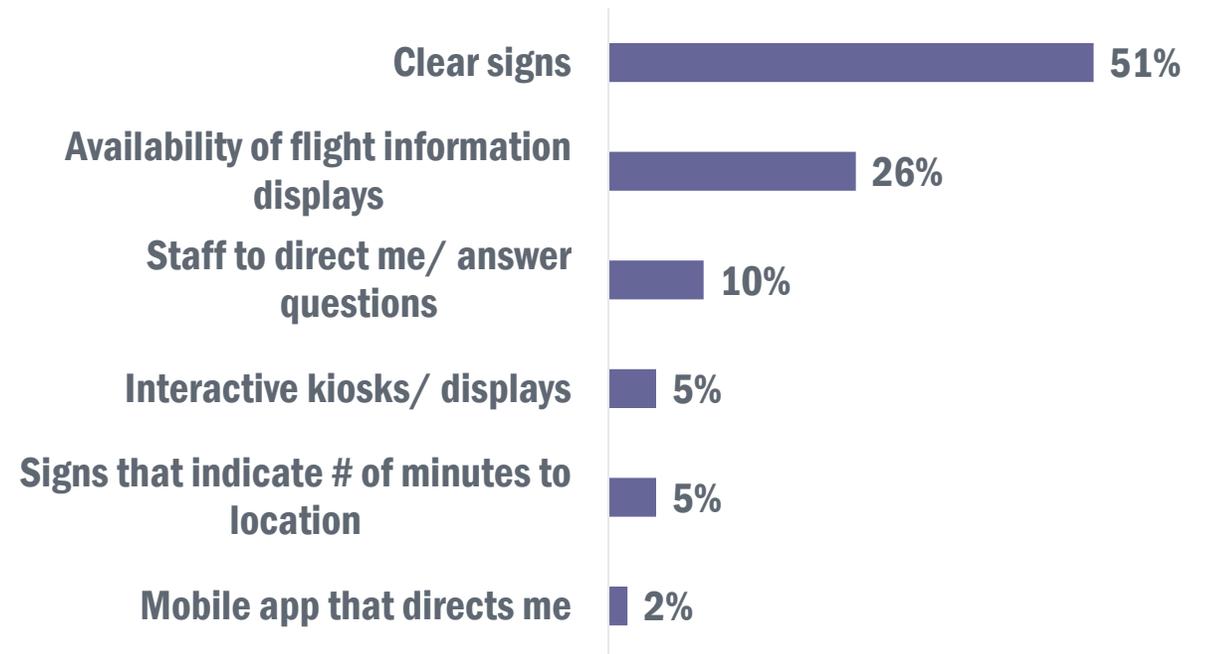
65%
Satisfied n = 356

Staff to Answer Questions



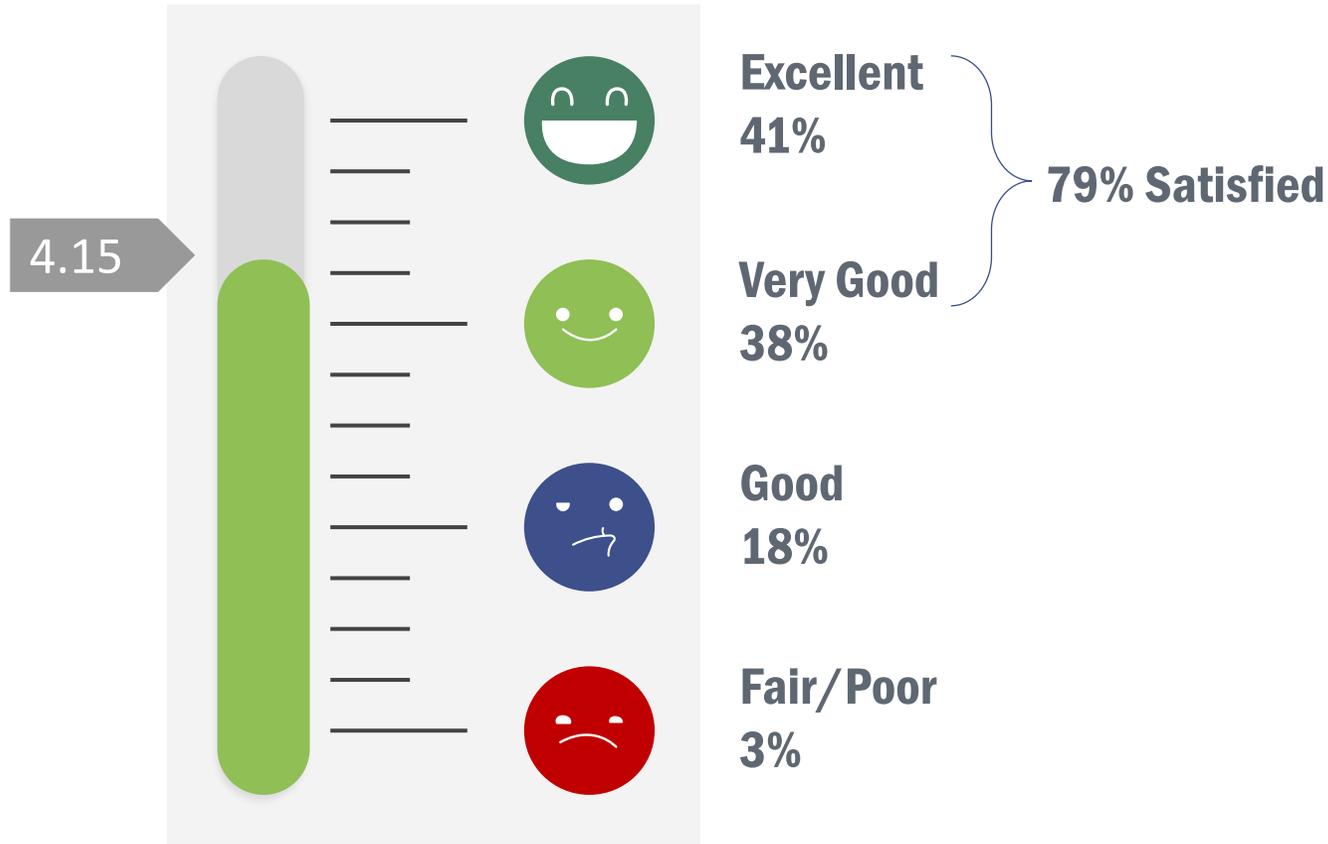
61%
Satisfied n = 337

Q: What is most important to your experience with getting around BWI?



BWI Overall

Q: How would you rate your OVERALL experience at BWI today?



n = 416

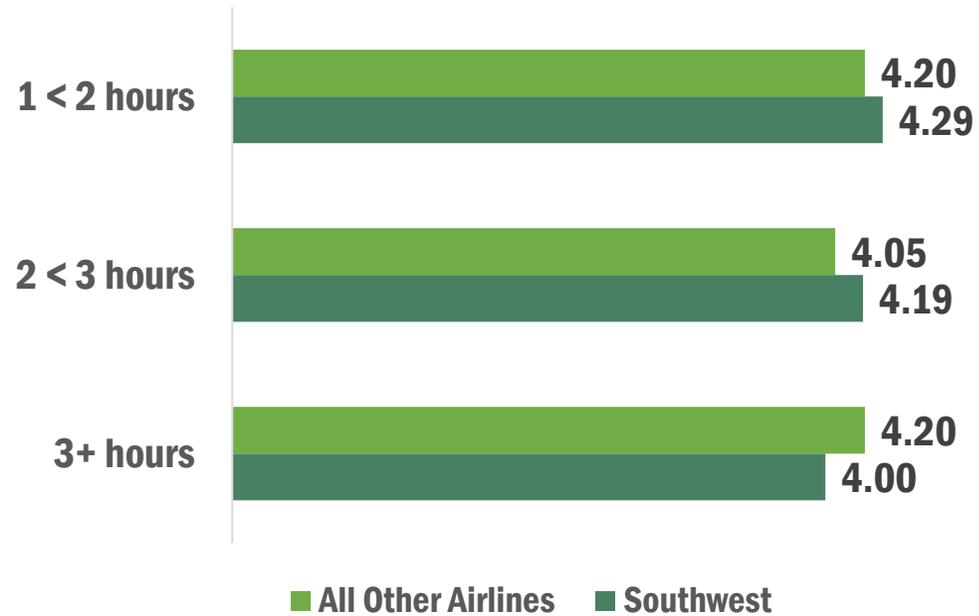


Satisfaction Decreased as Time Spent at BWI Increased



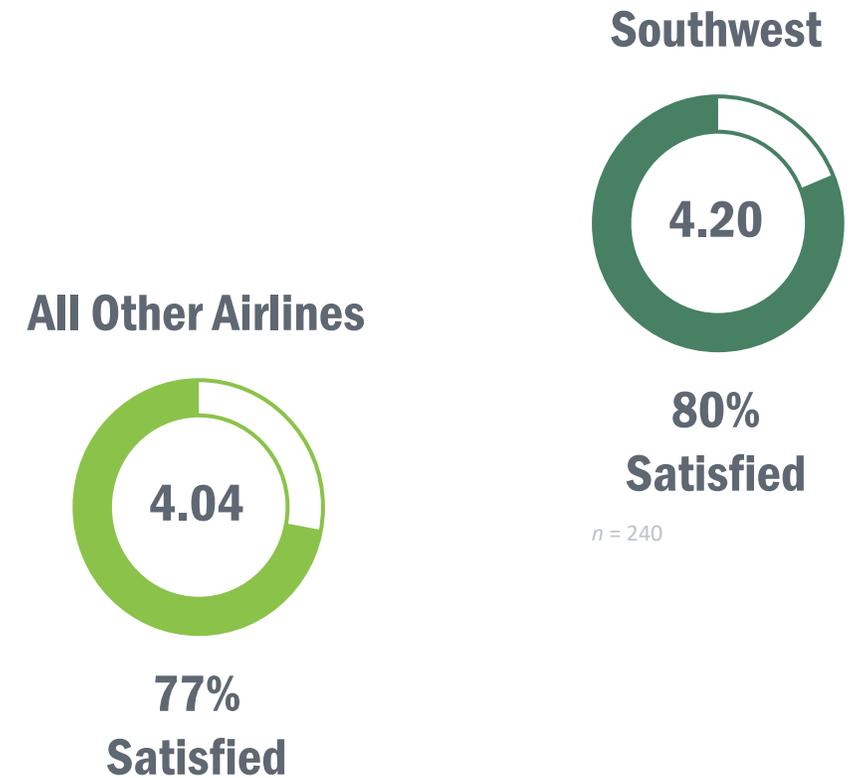
BWI Overall

Overall satisfaction by dwell time and airline



n = 416

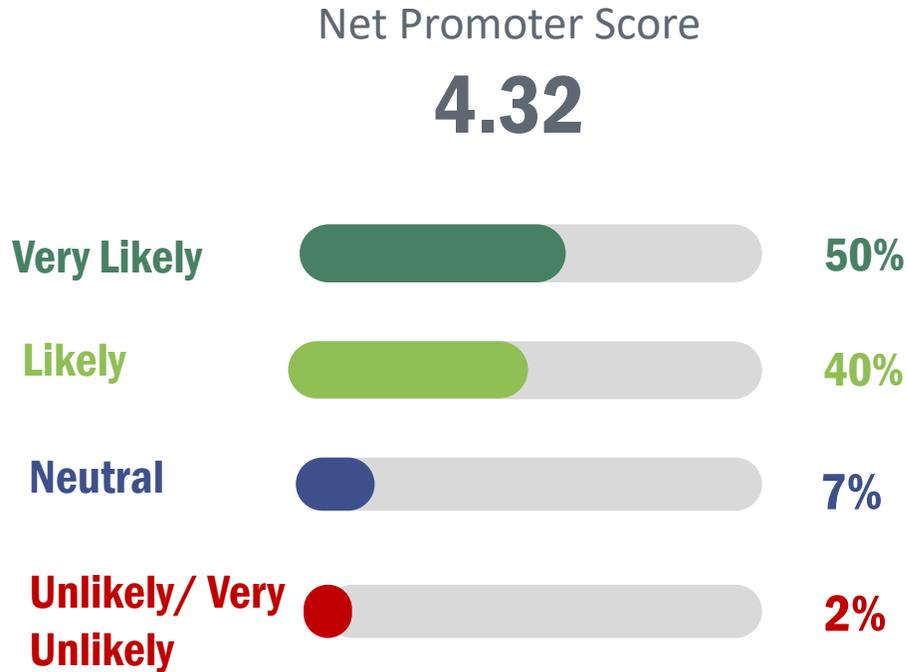
Overall satisfaction by airline



n = 89

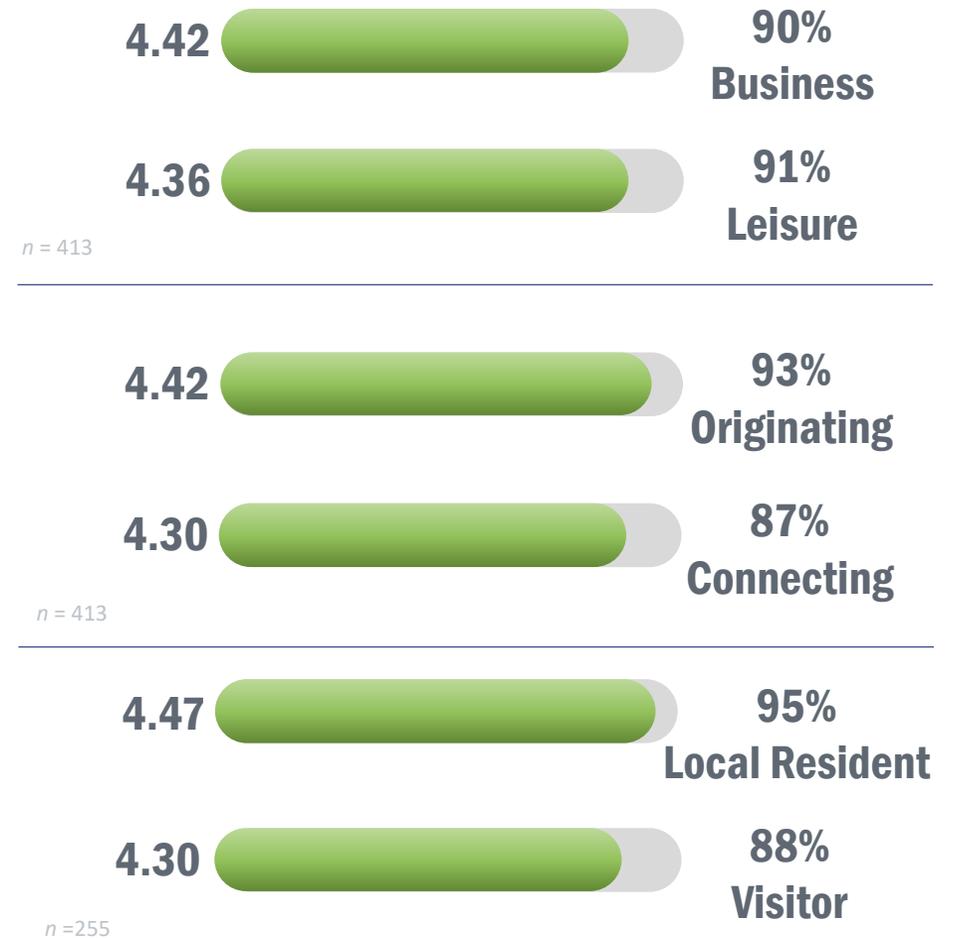
Net Promoter Score

Q: Based on your experience today, how likely are you to recommend using BWI to others?



90% of all passengers would likely or very likely recommend BWI to others

n = 413



Most Liked at BWI

Q. What did you LIKE most about your experience at BWI today?



Ease of checking in



Getting around BWI



Ease of security screening

Originating

Top 3

- Ease of checking-in
- Ease of security screening
- Easy access to BWI



Connecting

Top 3

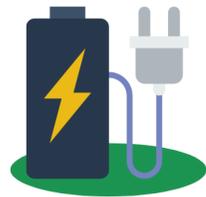
- Restaurants/ shops available
- Getting around
- Ease of checking-in

Least Liked at BWI

Q. What, if any, had a negative impact on your overall experience today?



Crowded gate seating



Charging stations/ outlets



Cleanliness

Originating

- Top 3
- Security screening
 - Crowded gate seating
 - Charging stations/ outlets



Connecting

- Top 3
- Crowded gate seating
 - Charging stations/ outlets
 - Cleanliness

Opportunities for Enhancements

Q: Is there anything we can do to improve your experience at BWI?

"all restaurants need to be open"

"bathrooms could use some cleaning" and "cleaning needed" (12x)

"install" "fix charging stations at gates" (20x)

"make sure the displays work"

"friendlier" "helpful" "additional staff"

"more functional water bottle refill areas"

"water fountains"

"cup holders at gates"



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