2011 Airport User Survey Program

Purpose

An on-going passenger survey program of departing/enplaning passengers at Ronald Reagan Washington National Airport and Washington Dulles International Airport is being conducted by the Airports Authority in order to provide information related to passengers’ awareness of the Airports Authority, a passenger profile, origin and destination information, and passenger satisfaction levels.

Highlights from the 2011 Passenger Survey, as well as comparisons to data collected since 1993, follow in this report.

Survey Design

From 1993 through 2000, the survey was conducted in airline gate waiting areas for an entire week every other month. In 2001, however, interviewing was conducted on the same bi-monthly basis, until the events of September 11th necessitated an almost year-long halt in interviewing. Interviewing resumed in June of 2002, allowing for only four fielding periods at the end of 2002 (periods 3-6). Full year interviewing resumed in 2003.

Survey interviewers randomly intercepted passengers and administered a short interview which gathered general airport perceptions, demographic information and origin & destination data. Passengers were then handed a lengthier User Survey booklet (to complete and hand in or mail back) which gathered in-depth information on passenger perceptions about airport services and facilities. 2,608 of the 2,798 passengers who completed the interview (93%) also completed the User Survey booklet.

As in previous years, the 2011 response rates are significantly higher than generally obtained in market research surveys. Interviewers continue to report that the high interest was indicative primarily of the passengers’ desire to provide feedback on the airports and a belief that their comments and suggestions could drive changes and improvements.

Data Preparation and Weighting

Survey results are tabulated and weighted to be representative of total numbers of passengers. This process minimizes biases of time-of-day, seasonality and trip purpose.
Rating of MWAA

Airport Ratings

- When asked to grade the airport using a letter-grade scale from A+ (excellent) through F (poor), about nine in ten 2011 respondents (92% National, 85% Dulles) gave the airports a grade between excellent and above average (A-B).
  - Furthermore, the proportion of Dulles passengers rating Dulles as excellent (A) has shown an increasing trend since 2006 (up from 29% in 2006 to 45%).
  - The proportion of respondents rating either airport as below average or poor (D-F) remains very low (<1% National, 1% Dulles).
The proportion of excellent ratings (rated as A) remains higher for National than for Dulles, although this gap has narrowed as the proportion of excellent ratings has continued its increasing trend at Dulles.

Passenger Profile

Household Income

- The median household income of respondents surveyed at National ($105,310) was slightly higher than that of Dulles respondents ($94,420) in 2011.

- About one-half of the 2011 respondents reported household incomes of $100,000 or more (52% National, 47% Dulles).
  - In fact, about three in ten National and Dulles passengers reported a household income of $150,000 or more (30% National, 26% Dulles).

Ticket Payment Method

- Those surveyed at National in 2011 most often said that their airline ticket was paid for by themselves, not using frequent flyer miles (38%) or by their employer or business (35%). (See PAX-12)

- Similarly, those surveyed at Dulles most often said that they had either paid for their ticket themselves, not using frequent flyer miles (46%) or that their employer or business had purchased the ticket (29%).
  - About one in ten respondents at both airports said they were using a ticket purchased by a relative (10% National, 9% Dulles), while approximately one in twenty said the government or military purchased their ticket (7% National, 5% Dulles) or they purchased their ticket using frequent flyer miles (6% National, 7% Dulles).

Free Time

- In 2011, Dulles passengers were more likely than National passengers to say they are spending more than one hour in the airport prior to departure (69% Dulles vs. 58% National).
  - Specifically, in 2011 more than one-fourth of the National respondents (27%) and almost four in ten Dulles respondents (38%) spent more than 90 minutes at the airport prior to departure.

Pre-Departure Stops

- The respondents at both airports were asked if, prior to their departure, they stopped at any of the following: a ticket counter, airline e-ticket kiosk, curbside check-in, airline club, Information Center or currency exchange.
  - At National, passengers were more likely to stop at an airline e-ticket kiosk (35%) than the ticket counter (24%). Nearly one in ten (9%) stopped at the curbside check-in.
  - At Dulles, passengers were slightly more likely to stop at the ticket counter (29%) than an airline e-ticket kiosk (24%). Almost one in ten stopped at the curbside check-in (8%).
  - Fewer respondents at either airport stopped at an information center, airline club and/or the currency exchange.
Annual Household Income?
The median household income for National respondents is slightly higher compared to Dulles respondents, with about one-half at both airports claiming an income of $100,000 or more.

Who paid for the ticket you are using today?
Respondents at both airports were most often traveling on a ticket that either they paid for themselves or that was paid for by their employer.

After security screening*, how much "free time" do you have before your flight leaves?
Dulles passengers continue to be more likely than National passengers to have more than 90 minutes of “free time” to spend at the airport prior to their departure.

*In CY 2008, question was changed from “after curbside baggage and/or ticket counter check-in” to “after the security screening process”
After security screening*, how much "free time" do you have before your flight leaves?
The majority of passengers at both airports are spending more than one hour in the airport prior to departure.


*In CY 2008, question was changed from "after curbside baggage and/or ticket counter check-in" to "after the security screening process"
Prior to your departure*, did you stop at...?

National passengers are more likely than Dulles passengers to stop at an airline e-ticket kiosk, while Dulles passengers are more likely to stop at an airline ticket counter than National passengers.


*In CY 2008, question wording changed from "Between the curbside and the time of your departure" to "Prior to your departure"
Origin and Destination Profile

Arrival Mode

- In 2011, the majority of respondents (83% National, 67% Dulles) arrived at the airports by some form of ground transportation, while the remainder arrived by airplane via a connecting domestic or international flight.

- The largest proportion of passengers who arrived at National via ground transportation arrived by taxi (31%) or personal or company vehicle (31%). One in five passengers (20%) arrived at National by Metrorail.
  - The most common method of arriving at Dulles by ground transportation continues to be in a personal or company vehicle (53%). However, more than one in ten arrived by taxi (15%) or rental car (13%).

- When asked how much they paid in transportation fares to get to the airport that day, Dulles passengers tended to pay more than National passengers (22% paid $21 or more at National, compared to 76% at Dulles).

Parking Usage

- Among those arriving by personal or company vehicle, the majority continue to be dropped off at the curbside by someone who did not park (63% National, 59% Dulles).
  - Those who parked at National most often used garage/daily/hourly parking (20%) or the economy lots (6%); similarly, those at Dulles most often parked in the economy lots (16%) or used garage/daily parking (14%).

Length of Parking

- More than one-fourth of the National passengers (27%) and almost one-half of the Dulles passengers (48%) reported that they plan to park for four or more days.
  - At National, the proportion of passengers who parked for less than one day increased from last year (up from 24% to 38%).

Departure Mode

- When asked how they plan to depart from the airport when they return, the largest proportion of Dulles passengers indicated they would be leaving in a personal or company vehicle (54%) -- either by driving a car that they had parked at the airport (31%) or by being picked up by someone else (22%).

- National passengers most often said they would either use a personal or company vehicle (32%), a taxi (27%) or Metrorail (27%). Only 16% of National passengers said they would be driving off in a car that they had parked at the airport, compared to 31% at Dulles.
How did you arrive at this airport today (Ground Mode Only)? National passengers most often arrived by taxi, a personal or company vehicle or Metrorail, while over one-half of Dulles passengers arrived by a personal or company vehicle. The proportion of National passengers arriving by personal or company vehicle has shown an increasing trend since 2009.

How did you arrive at this airport today (Aircraft Connections Only)?
Almost one-third of the connecting Dulles passengers arrived on an international flight.

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How long do you plan to park?

Dulles passengers are slightly more likely than National passengers to say they plan to park for less than 24 hours. However, the proportion of Dulles passengers planning to park for more than one week increased in 2011.

Upon return to this area, how do you plan to depart from this airport? National respondents are most likely to leave the airport via taxi, Metrostart or a personal or company vehicle, whereas Dulles respondents are most likely to leave in a personal or company vehicle.

Upon return to this area, how do you plan to depart from this airport? National respondents are most likely to leave the airport via a personal or company vehicle, Metrorail or a taxi, whereas more than one-half of the Dulles respondents are most likely to leave in a personal or company vehicle.

Customer Satisfaction

Respondents were asked to rate their satisfaction with various aspects of their airport experience.

Getting to the Airport (National)

- The vast majority of respondents at National remain satisfied with transportation to the airport. Specifically, at least nine in ten National passengers surveyed in 2011 were satisfied with the following aspects of transportation to the airport:
  - Availability of public transportation (95%)
  - Getting from the Metro station to the airport terminal (92%)
  - Other shared ride, door-to-door van shuttle service (92%)
  - Roadway signs to the airport (91%)

- Only slightly fewer were satisfied with roads to the airport (88%), the price of public transportation (87%) and/or Super Shuttle (85%).
  - Notably, the proportion very satisfied with getting from the Metro station to the airport terminal (down from 56% to 46%) and availability of public transportation (down from 58% to 51%) have seen a decreasing trend since 2009.

Getting to the Airport (Dulles)

- Among Dulles respondents, five attributes related to getting to Dulles received positive ratings from at least nine in ten respondents, including:
  - Other shared ride, door-to-door van shuttle service (94%)
  - The Washington Flyer Coach (93%)
  - Roadway signs to the airport (92%)
  - Roads to the airport (92%)
  - Super Shuttle (90%)

- Close to nine in ten were also satisfied with the Washington Flyer Taxi (89%), while more than three-fourths were satisfied with the price of public transportation (77%).
  - While only six in ten were satisfied with the availability of public transportation (60%), this proportion has increased since 2007 (36%).

- Notably, the proportion very satisfied with the Washington Flyer Coach increased from 2010 to 2011 (up from 34% to 41%).

  - However, the proportion very satisfied with the roadway signs to the airport has decreased since 2008 (down from 43% to 37%).
Parking (National)

- Overall, more than nine in ten 2011 National respondents expressed satisfaction with the signs to airport parking facilities (93%), while slightly fewer were satisfied with the signs for airport parking availability (86%).

- About eight in ten were also satisfied with the availability of covered parking (82%) and/or the availability of surface parking (80%, up from 64% in 2007).
  - Meanwhile, almost one-half of the passengers are still dissatisfied with the cost of parking at National (47%, up from 39% in 2008).

Parking (Dulles)

- Overall, about nine in ten Dulles respondents were satisfied with the signs to airport parking facilities (93%) and/or the availability of surface parking (90%). In addition, more than eight in ten were satisfied with the availability of covered parking (88%) and/or the signs for airport parking availability (87%).
  - In fact, the proportion very satisfied with the following attributes of parking at Dulles has increased recently: the availability of surface parking (up from 18% in 2007 to 34%), the availability of covered parking (up from 18% in 2007 to 33%) and the cost of airport parking (up from 11% in 2009 to 17%).

- On the other hand, more than one-third of the respondents remain dissatisfied with the cost of parking at Dulles (32%, down from 39% in 2009).

Getting to the Terminal (National)

- The vast majority of respondents continue to be satisfied with attributes pertaining to getting to the terminal at National.
  - Specifically, at least nine in ten are satisfied with the ease of getting to the terminals (93%), having clear directional signs to the terminals (93%), shuttle bus service to the airport terminals (90%) and/or clear signs for shuttle bus service (90%).

Getting to the Terminal (Dulles)

- Similar to National, the vast majority of respondents continue to be satisfied with attributes pertaining to getting to the terminal at Dulles.
  - Specifically, more than nine in ten are satisfied with having clear directional signs to the terminals (96%), the shuttle bus service to the airport terminals (93%), the ease of getting to the terminals (93%) and/or clear signs for shuttle bus service (92%).
  - Notably, the proportion very satisfied with the clear signs for shuttle bus service increased since 2009 (up from 36% in 2009 to 42%).
Checking In (National)

- In 2011, the vast majority of National respondents were satisfied with aspects of checking in at National, with at least nine in ten reporting satisfaction with the airline e-ticket kiosk (95%), the ease of locating the ticket counter (95%), the time spent in line to check in (94%), the ticket counter check-in (93%), and/or the skycaps at the curbside check-in (92%).
  - Notably, the proportion very satisfied with the time spent in line to check in has increased since 2007 (up from 40% to 49%).

Checking In (Dulles)

- Similar to National, the vast majority of Dulles respondents were satisfied with aspects of checking in at the airport, with roughly nine in ten expressing satisfaction with the skycaps at the curbside check-in (93%), the airline e-ticket kiosk (91%), the ease of locating the ticket counter (88%), the ticket counter check-in (87%) and/or the time spent in line to check in (87%).
  - In fact, the proportion very satisfied with the ease of locating the ticket counter (up from 33% to 41%) and the in-airport ticket counter check-in/baggage check (up from 34% to 41%) has trended higher since 2007.

Getting to the Gate (National)

- In 2011, at least nine in ten respondents remained satisfied with all attributes comprising getting to the gate at National, specifically:
  - Signs to security checkpoints (97%)
  - Distance between the ticket counter and the departure gates (97%)
  - Clarity of posted security guidelines (97%)
  - Directional signs inside the terminal (96%)
  - Ease of finding connecting flight/gate (95%)
  - Courtesy of security screening staff (94%)
  - Flight information displays (93%)
  - Time to get through security screening (92%)
  - Security screening process (90%)

- Notably, the proportion very satisfied with the distance between the ticket counter and the departure gates (up from 36% to 43%) has trended slightly higher at National since 2007.
Getting to the Gate (Dulles)

- In 2011, more than nine in ten respondents were satisfied with the following aspects of getting to the gate at Dulles:
  - Directional signs inside the terminal (97%)
  - Signs to security checkpoints (96%)
  - Clarity of posted security guidelines (95%)
  - Flight information displays (94%)
  - Courtesy of security screening staff (94%)
  - Ease of finding connecting flight/gate (94%)
  - Security screening process (92%)
  - Mobile lounge (92%)
- In addition, at least eight in ten were satisfied with the time to get through security screening (87%) and/or the distance between the ticket counter and the departure gates (82%).
- Notably, the proportion very satisfied with the following attributes related to getting to the gate at Dulles has increased since 2007: the directional signs inside the terminal (up from 35% to 44%), the ease of finding a connecting flight/gate (up from 32% to 40%) and the mobile lounge (up from 23% to 36%).

At the Gate (National)

- Most 2011 National respondents remained satisfied with each of the gate-related attributes, including the boarding gate check-in (97%), the distance between the eating places and departure gates (97%), the distance between the retail shops and departure gates (96%), the announcements regarding flights (92%), the location and availability of ATMs (89%) and/or adequate seating in the departure gate areas (88%).
  - While about one-third of National respondents are still dissatisfied with the availability of electrical outlets in the departure gate areas (31%), the proportion very satisfied has increased significantly since 2007 (up from 11% to 27%).

At the Gate (Dulles)

- Similar to National, overall satisfaction with most of the gate-related attributes at Dulles remains high. Specifically, about nine in ten or more Dulles respondents in 2011 were satisfied with the boarding gate check-in (96%), the announcements regarding flights (93%), adequate seating in the departure gate areas (93%), the distance between the retail shops and departure gates (91%), the distance between the eating places and departure gates (90%) and/or the location and availability of ATMs (86%).
  - Conversely, one-third (33%) remain dissatisfied with the availability of electrical outlets in the departure gate areas.
Airport Facilities (National)

- Overall satisfaction with each of the attributes pertaining to airport facilities at National remained high in 2011. Specifically, more than nine in ten were satisfied with the following airport facility attributes:
  - Cleanliness outside (98%) and in (95%) the terminal
  - Lighting levels in the terminal (97%)
  - Signs to passenger services and facilities for persons with disabilities (97%)
  - Signs to passenger services and facilities (97%)
  - Signs to restaurants and shops (97%)
  - Working condition of elevators, escalators and moving sidewalks (97%)
  - Building (95%) and concession (95%) information directories
  - Overall appearance of the facilities (95%)
  - Temperature in the terminal (95%)
  - Availability of restrooms (94%)
  - Availability of baggage carts (93%)
  - Accessibility of paging telephones (91%)
  - The public address system (91%)

- Almost nine in ten were satisfied with the cleanliness of the restrooms (89%), and/or the space for people to meet and greet (86%).

- The proportion very satisfied with each of these attributes of airport facilities has increased since 2007, most significantly for signs to restaurants and shops (up from 21% in 2007 to 36% in 2011), the public address system (up from 16% to 30%), accessibility of paging telephones (up from 20% to 39%) and space for people to meet and greet (up from 17% to 29%).
Airport Facilities (Dulles)

- Similar to National, overall satisfaction with each of the attributes pertaining to airport facilities at Dulles remained high in 2011, with at least nine in ten Dulles passengers satisfied with each attribute:
  - Working condition of elevators, escalators and moving sidewalks (98%)
  - Availability of restrooms (98%)
  - Lighting levels in the terminal (97%)
  - Cleanliness outside (97%) and in (96%) the terminal
  - Signs to passenger services and facilities (96%)
  - Overall appearance of the facilities (95%)
  - Temperature in the terminal (95%)
  - Signs to passenger services and facilities for persons with disabilities (95%)
  - Building (95%) and concession (93%) information directories
  - Cleanliness of restrooms (93%)
  - Signs to restaurants and shops (93%)
  - Availability of baggage carts (92%)
  - Public address system (90%)
  - Space for people to meet and greet (90%)
- The proportion very satisfied with each of these attributes of airport facilities has increased since 2007, most significantly for building information directories (up from 22% in 2007 to 34% in 2011), the working condition of elevators, escalators and moving sidewalks (up from 30% to 41%) and the availability of baggage carts (up from 22% to 33%).

Airport Services (National)

Food & Drink Establishments

- Overall satisfaction with attributes pertaining to food and drink establishments at National remained consistent in 2011 with previous years.
- Specifically, at least nine in ten National respondents were satisfied with customer service (91%), while somewhat fewer were satisfied with the quality of food at eating places (81%), the variety of eating places (77%) and/or the food prices at eating places (72%).
Non-Food Retail Establishments

- Overall, about nine in ten National respondents were satisfied with the following attributes of retail establishments at National: customer service at newsstands (93%), the quality of merchandise at newsstands (92%), customer service at retail shops, including bookstores (92%) and/or the quality of merchandise at retail shops, including bookstores (88%). More than seven in ten expressed satisfaction with the remaining retail establishment attributes, specifically the variety of retail shops, including bookstores (80%), the prices of newsstand items (78%) and/or the prices of retail shop items (74%).

- Notably, the proportion of National respondents very satisfied with each of the following newsstands attributes has trended higher recently: the prices (up from 10% in 2008 to 17%), customer service (up from 12% in 2007 to 22%) and the quality of merchandise (up from 12% in 2007 to 20%).

Other Services/Facilities

- Overall satisfaction ratings for most of the other National services and facilities remain high. In fact, about nine in ten or more National respondents in 2011 were satisfied with the following: cell phone coverage (94%), the currency exchange (93%), the Washington Flyer magazine (91%), and/or the airline clubs (90%).
  - More than eight in ten are satisfied with WiFi Internet access (83%) and/or the overall ability to access the Internet (81%).

- In fact, the proportion very satisfied with the overall ability to access the Internet at National has steadily trended higher since 2007 (up from 13% to 29%) as has the proportion very satisfied with airline clubs (up from 11% to 29%) and currency exchange (up from 11% to 29%).

Airport Services (Dulles)

Food & Drink Establishments

- Overall satisfaction with most attributes pertaining to food and drink establishments at Dulles was generally high, with more than eight in ten satisfied with the customer service provided at (91%), the quality of food at (84%) and variety of (83%) the eating places.
  - Additionally, almost three-fourths were satisfied with the food prices at the eating places (73%).

Non-Food Retail Establishments

- Overall satisfaction with attributes pertaining to the retail establishments at Dulles remains high, with at least three-fourths satisfied with each: customer service at newsstands (94%), customer service at retail shops, including bookstores (93%), the quality of merchandise at newsstands (91%), the duty-free shops/kiosks (90%), the quality of merchandise at retail shops, including bookstores (90%), the variety of merchandise at duty-free shops (89%), the prices of duty-free shop items (85%), the variety of retail shops (84%), the prices of newsstand items (77%) and/or the prices of retail shop items, including bookstores (74%).
**Other Services/Facilities**

- Satisfaction levels with many of the other Dulles services and facilities remain high in 2011. Overall, about nine in ten Dulles respondents were satisfied with the following aspects of other services and facilities: cell phone coverage (93%), the *Washington Flyer* magazine (91%), the currency exchange (89%), the airline clubs (89%), overall ability to access the Internet (86%) and/or WiFi Internet access (85%).
  - Notably, about three in ten Dulles passengers were very satisfied with WiFi Internet access (33%, up from 19% in 2010) and/or the overall ability to access the Internet (31%, up from 20% in 2010).

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**Leaving the Airport (National)**

- Respondents who have flown into National in the past year were asked to rate it for various transportation and egress attributes. At least nine in ten National respondents in 2011 were satisfied with the following attributes related to leaving the airport:
  - Signs to baggage claim areas (95%)
  - Shuttle bus service to airport parking areas and all terminals (94%)
  - Other shared ride, door-to-door van shuttle service (94%)
  - Signs to taxi service (94%)
  - Availability of public transportation to leave the airport (93%)
  - Super Shuttle service to leave the airport (93%)
  - Signs to Super Shuttle (93%)
  - Signs to public transportation (93%)
  - Price of public transportation to leave the airport (92%)
  - Cleanliness/Condition of the taxi vehicle (92%)
  - Professionalism of the taxi driver (92%)
  - Ease of exiting parking facilities (92%)
  - Availability of taxi service to leave the airport (91%)
  - Roads to leave the airport (90%)

- In addition, more than eight in ten were satisfied with the following:
  - Baggage claim information displays (88%)
  - Roadway signs to leave airport (87%)
  - Price of taxi service to leave the airport (84%)
  - Timely delivery of baggage to baggage claim area (81%)

- Notably, the proportion very satisfied with the following attributes has increased from 2007 to 2011: availability of taxi service to leave the airport (up from 24% to 32%), the price of taxi service to leave the airport (up from 13% to 22%), the professionalism of the taxi driver (up from 14% to 24%), the cleanliness and/or condition of the taxi vehicle (up from 13% to 22%) and/or the roads to leave the airport (up from 15% to 24%).
Leaving the Airport (Dulles)

- Respondents who have flown into Dulles in the past year were asked to rate it for various transportation and egress attributes. Overall satisfaction with most of the attributes remained high in 2011, with more than eight in ten respondents expressing satisfaction with the following:
  - Signs to the baggage claim area (96%)
  - Signs for Pay & Go (94%)
  - Pay & Go machine locations (94%)
  - Shuttle bus service to airport parking areas and all terminals (93%)
  - Other shared ride, door-to-door van shuttle service (93%)
  - Availability of taxi service to leave the airport (93%)
  - Cleanliness/Condition of the taxi vehicle (92%)
  - Ease of exiting parking facilities (92%)
  - Roads to leave the airport (92%)
  - Availability/Number of Pay & Go machines (91%)
  - Baggage claim information displays (91%)
  - Roadway signs to leave the airport (90%)
  - Signs to public transportation (90%)
  - Signs to taxi service (90%)
  - Signs to Washington Flyer Coach (89%)
  - Signs to Super Shuttle (89%)
  - Timeliness of Mobile Lounge transfers to the IAB (88%)
  - Professionalism of the taxi driver (88%)
  - Super Shuttle service to leave the airport (87%)
  - Customs & Border Patrol clearance (86%)
  - Price of public transportation to leave the airport (85%),
  - Timeliness of Customs & Border Patrol clearance (83%)
  - Timely delivery of baggage to the baggage claim area (83%)
  - The availability of public transportation to leave the airport (83%)

- In addition, about seven in ten were satisfied with the price of taxi service to leave the airport (73%).

- Notably, the proportion very satisfied with the signs to the baggage claim area (up from 22% to 33%), the baggage claim information displays (up from 20% to 32%) and the timely delivery of baggage to the baggage claim area (up from 17% to 26%) increased from 2007 to 2011.
Rental Cars (National)

- More than nine in ten National respondents in 2011 said they are satisfied with the availability of rental cars (97%) and/or the courtesy of rental car employees (91%), while about eight in ten were satisfied with the timeliness of the shuttle bus to and from the rental car facility (86%), the signs to the rental cars (83%) and/or the price of the rental cars (81%).

- Notably, overall satisfaction with the courtesy of rental car employees has seen an increasing trend from 2008 (up from 86% to 91% in 2011).

Rental Cars (Dulles)

- Similar to National, satisfaction with attributes related to rental cars was high in 2011 at Dulles, with approximately nine in ten Dulles respondents satisfied with the availability of rental cars (96%), the courtesy of rental car employees (95%), the signs to the rental cars (92%), and/or the timeliness of the shuttle bus to and from the rental car facility (92%), while eight in ten were satisfied with the price of the rental cars (86%).

- The proportion satisfied with the courtesy of rental car employees increased in 2011 (from 89% in 2010 to 95%).
Key Driver Analysis

In an effort to identify underlying components of passengers’ overall rating of the airport at which they were intercepted, advanced statistical techniques were employed. Regression analyses were conducted between each composite measure attribute and the overall rating of the airport in order to ascertain which attributes have the greatest impact.

A key objective of any customer satisfaction research is to identify priorities for improving customer satisfaction. By conducting this analysis, MWAA can focus resources to areas that are most important to passengers at National and at Dulles and where improvement is needed, referred to as unmet needs. In addition, areas that are very important to members and on which MWAA performs well are the driving strengths. Insights can be gained by plotting these attributes based on their impact on passengers’ overall rating of the airport, as shown below for both airports.

National

- The composite attribute Airport Services fell into the category of unmet needs of highest impact and lowest satisfaction. Passengers at National gave moderate satisfaction ratings for Airport Facilities, an area that has a relatively high impact on their overall rating of National. In addition, Parking received somewhat lower satisfaction ratings, but has a moderate impact on passengers’ overall rating of National. Consequently, both of these composites should be among the higher priorities for MWAA to improve overall passenger satisfaction with National.
- Showing an improvement from 2010, there were no composites that fell “cleanly” into the unmet needs of highest impact and lowest satisfaction. Passengers at Dulles gave moderate satisfaction ratings for *Getting to the Gate*, an area that has a relatively high impact on their overall rating of Dulles. In addition, *Leaving the Airport, At the Gate, Checking in and Airport Services* received somewhat lower satisfaction ratings, but have a moderate impact on passengers’ overall rating of Dulles. Therefore, these composites should be high priorities for MWAA to improve overall passenger satisfaction with Dulles.

- Notably, *Airport Facilities* received high satisfaction ratings and have among the highest impact on the overall rating of Dulles; therefore, it is considered a driving strength of Dulles.
How satisfied are you with the following (Getting to the Airport)?

The proportion of Dulles respondents very satisfied with the Washington Flyer Coach increased in 2011. The majority of National respondents continue to be satisfied with getting from the Metro to the terminal.

**NATIONAL**
Getting from Metro Station to Airport Terminal

**DULLES**
Washington Flyer Coach
(from West Falls Church Metro)

Overall satisfaction with the Washington Flyer Taxi continues to be high among Dulles passengers.

How satisfied are you with the following (Getting to the Airport)?

The proportion of National and Dulles passengers very satisfied with the Super Shuttle has increased in 2011, while the proportion of National and Dulles passengers who were very satisfied with other shared rides has decreased recently.

How satisfied are you with the following (Getting to the Airport)?

About four in ten Dulles passengers report being dissatisfied with the availability of public transportation to Dulles compared to one in twenty National passengers.

How satisfied are you with the following (Getting to the Airport)?

The proportion satisfied with the roadway signs at both airports has remained relatively consistent in recent years, while the proportion satisfied overall with the roads to the airport has decreased slightly from 2009 at National and from 2008 at Dulles.

How satisfied are you with the following (Parking)?

The proportion of National and Dulles passengers satisfied overall with the signs to airport parking facilities and availability remained relatively consistent from 2010 to 2011.

**NATIONAL**

**Signs to Airport Parking Facilities**

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**Signs for Airport Parking Availability**

<table>
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<th>Dissatisfied</th>
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**DULLES**

**Signs to Airport Parking Facilities**

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<td>CY 2011</td>
<td>53.5</td>
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</table>

How satisfied are you with the following (Parking)?

Overall satisfaction among National respondents with the availability of surface parking continues to increase from 2007, although about one in five are still dissatisfied. Meanwhile, overall satisfaction with the availability of surface parking at Dulles has increased since 2009.

**NATIONAL**

Availability of Surface Parking

**DULLES**

Availability of Surface Parking

Availability of Covered (Garage) Parking

**DULLES**

Availability of Covered (Garage) Parking

How satisfied are you with the following (Parking)?

The proportion of National respondents satisfied overall with the parking advisory radio messages has decreased since 2009. Meanwhile, the proportion of Dulles respondents satisfied overall has increased since 2009.

How satisfied are you with the following (Getting to the Terminal)?

Overall satisfaction with signs to the terminal and shuttle bus service at both airports remained relatively unchanged.

How satisfied are you with the following (Getting to the Terminal)?

Overall satisfaction with the shuttle bus service and ease of getting to the terminals at Dulles has remained relatively consistent in recent years.

**NATIONAL**

Shuttle Bus Service to Airport Terminals

**DULLES**

Shuttle Bus Service to Airport Terminals

Ease of Getting to Terminals

Ease of Getting to Terminals

How satisfied are you with the following (Checking In)?

The majority of respondents at both airports remain satisfied with the curbside and in-airport check-in processes.

### NATIONAL

**Curbside Baggage Check-In/Skycaps**

<table>
<thead>
<tr>
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<th></th>
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### DULLES

**Curbside Baggage Check-In/Skycaps**

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### In-Airport Ticket Counter Check-In/Baggage Check

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</thead>
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<tr>
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### In-Airport Ticket Counter Check-In/Baggage Check

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<td>8.9</td>
<td>10.4</td>
<td>7.5</td>
<td>8.9</td>
<td>13.2</td>
</tr>
</tbody>
</table>

How satisfied are you with the following (Checking In)?

Overall satisfaction with the e-ticket kiosks and the ease of locating ticket counters at both National and Dulles remains high, with those who are very satisfied remaining around four in ten or more at both airports.

How satisfied are you with the following (Checking In)?

The majority of passengers at both airports remain satisfied with the time spent in line to check in, with the proportion of passengers very satisfied at Nationals increasing steadily from 2009.

How satisfied are you with the following (Getting to the Gate)?

The vast majority remain satisfied with directional signs inside the terminal at both airports, with the majority of National passengers also being satisfied overall with the distance between ticketing counter and departure gates. About one in five remain dissatisfied with the distance between the ticket counter and departure gates at Dulles.

**NATIONAL**

**Directional Signs Inside the Terminal**

<table>
<thead>
<tr>
<th></th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>CY 2007</td>
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</table>

**Distance Between Ticket Counter & Departure Gates**

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<th>Dissatisfied</th>
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</tr>
<tr>
<td>CY 2010</td>
<td>42.8</td>
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<tr>
<td>CY 2011</td>
<td>39.7</td>
<td>39.7</td>
<td>5.8</td>
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**DULLES**

**Directional Signs Inside the Terminal**

<table>
<thead>
<tr>
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<th>Very Satisfied</th>
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<tr>
<td>CY 2007</td>
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<td>CY 2008</td>
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<td>CY 2010</td>
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**Distance Between Ticket Counter & Departure Gates**

<table>
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<tr>
<td>CY 2011</td>
<td>22.1</td>
<td>24.9</td>
<td>34.6</td>
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</table>

How satisfied are you with the following (Getting to the Gate)?

Overall satisfaction with the ease of finding connecting flights/gates at both airports continues to be high, with the proportion of Dulles passengers who are very satisfied increasing since 2007.

The proportion of Dulles passengers satisfied overall with the mobile lounge between the terminal and gate increased in 2011, while the proportion very satisfied continues its increasing trend since 2009.

How satisfied are you with the following (Getting to the Gate)?

The vast majority of National and Dulles passengers continue to be satisfied with the signs to security checkpoints and the clarity of posted security guidelines.

**NATIONAL**

**Signs to Security Checkpoints**

<table>
<thead>
<tr>
<th>Year</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
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**Clarity of Posted Security Guidelines**

<table>
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**DULLES**

**Signs to Security Checkpoints**

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**Clarity of Posted Security Guidelines**

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<tr>
<td>CY 2011</td>
<td>33.0</td>
<td>62.4</td>
<td>4.6</td>
</tr>
</tbody>
</table>

How satisfied are you with the following (Getting to the Gate)?
Overall satisfaction with the time it takes to get through security screening and the security screening process remains relatively high at both airports.

How satisfied are you with the following (Getting to the Gate)?

The vast majority of respondents at both airports remain satisfied with the courtesy of the security screening staff and the flight information displays.

How satisfied are you with the following (At the Gate)?

The proportion satisfied with the amount of seating in the departure gate area and/or the boarding gate check-in has remained relatively consistent at National and Dulles.

How satisfied are you with the following (At the Gate)?

Overall satisfaction with the distance between eating places and departure gates as well as between retail shops and departure gates at both airports remained relatively consistent with previous years.

How satisfied are you with the following (At the Gate)?
The proportion very satisfied with the announcements regarding flights remained at approximately three in ten for both airports.

How satisfied are you with the following (At the Gate)?

Overall satisfaction at both airports with the availability of electrical outlets in departure gate areas was higher in 2011 than in 2010. However, about three in ten are dissatisfied at both airports.

How satisfied are you with the following (Airport Facilities)?

Overall satisfaction with the signs to passenger services and facilities for all types of passengers has remained very high at both National and Dulles.

### NATIONAL
**Signs to Passenger Services & Facilities**

<table>
<thead>
<tr>
<th>Year</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
</tr>
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### DULLES
**Signs to Passenger Services & Facilities**

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### Signs to Passenger Services & Facilities for Persons with Disabilities

<table>
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</tr>
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### Signs to Passenger Services & Facilities for Persons with Disabilities

<table>
<thead>
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<td>CY 2008</td>
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<tr>
<td>CY 2010</td>
<td>39.4</td>
<td>68.1</td>
<td>5.4</td>
</tr>
</tbody>
</table>

How satisfied are you with the following (Airport Facilities)?

National respondents are slightly more satisfied overall with signs to restaurants and shops than Dulles respondents.

How satisfied are you with the following (Airport Facilities)?
The majority of passengers at either airport remain satisfied with the public address system.

How satisfied are you with the following (Airport Facilities)?

The proportion very satisfied with the space for people to meet and greet at National has trended higher since 2007. Similarly, the proportion very satisfied with the overall appearance of the facilities at Dulles has trended higher since 2007.

**NATIONAL**  
Space for People to Meet & Greet

**DULLES**  
Space for People to Meet & Greet

**Overall Appearance of the Facilities**

**Overall Appearance of the Facilities**

How satisfied are you with the following (Airport Facilities)?

The proportion very satisfied with the availability and cleanliness of restrooms remained relatively consistent with last year at both National and Dulles.

**NATIONAL**

**Availability of Restrooms**

**Cleanliness of Restrooms**

**DULLES**

**Availability of Restrooms**

**Cleanliness of Restrooms**

How satisfied are you with the following (Airport Facilities)?

Overall, the vast majority of passengers at both National and Dulles are satisfied with the cleanliness in and outside the terminal, which is consistent with previous years.

How satisfied are you with the following (Airport Facilities)?

The vast majority of respondents at both airports are satisfied with the lighting levels and temperature inside the terminal.

How satisfied are you with the following (Airport Facilities)?
The vast majority of National and Dulles respondents are satisfied with the building and concession information directories at the airport.

### NATIONAL
#### Building Information Directories

<table>
<thead>
<tr>
<th>Year</th>
<th>Very Satisfied</th>
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<th>Dissatisfied</th>
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<tbody>
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<tr>
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<td>25.3%</td>
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<td>5.1%</td>
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<tr>
<td>2009</td>
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<td>2010</td>
<td>27.2%</td>
<td>68.0%</td>
<td>4.8%</td>
</tr>
<tr>
<td>2011</td>
<td>28.2%</td>
<td>67.0%</td>
<td>4.8%</td>
</tr>
</tbody>
</table>

### DULLES
#### Building Information Directories

<table>
<thead>
<tr>
<th>Year</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>22.3%</td>
<td>69.6%</td>
<td>8.1%</td>
</tr>
<tr>
<td>2008</td>
<td>27.9%</td>
<td>65.7%</td>
<td>6.3%</td>
</tr>
<tr>
<td>2009</td>
<td>29.4%</td>
<td>64.6%</td>
<td>7.1%</td>
</tr>
<tr>
<td>2010</td>
<td>30.2%</td>
<td>65.8%</td>
<td>6.6%</td>
</tr>
<tr>
<td>2011</td>
<td>33.5%</td>
<td>61.1%</td>
<td>5.5%</td>
</tr>
</tbody>
</table>

### Concession Information Directories

#### National

<table>
<thead>
<tr>
<th>Year</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>19.1%</td>
<td>71.6%</td>
<td>9.4%</td>
</tr>
<tr>
<td>2008</td>
<td>25.1%</td>
<td>68.9%</td>
<td>6.1%</td>
</tr>
<tr>
<td>2009</td>
<td>28.5%</td>
<td>67.2%</td>
<td>4.2%</td>
</tr>
<tr>
<td>2010</td>
<td>28.0%</td>
<td>67.0%</td>
<td>5.0%</td>
</tr>
<tr>
<td>2011</td>
<td>27.5%</td>
<td>67.2%</td>
<td>5.3%</td>
</tr>
</tbody>
</table>

#### Dulles

<table>
<thead>
<tr>
<th>Year</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>22.7%</td>
<td>68.0%</td>
<td>9.3%</td>
</tr>
<tr>
<td>2008</td>
<td>28.6%</td>
<td>64.2%</td>
<td>7.1%</td>
</tr>
<tr>
<td>2009</td>
<td>30.2%</td>
<td>63.4%</td>
<td>6.5%</td>
</tr>
<tr>
<td>2010</td>
<td>29.8%</td>
<td>63.6%</td>
<td>6.6%</td>
</tr>
<tr>
<td>2011</td>
<td>33.4%</td>
<td>60.0%</td>
<td>6.6%</td>
</tr>
</tbody>
</table>

### SOURCE:
How satisfied are you with the following (Airport Facilities)?

The vast majority of respondents continue to be satisfied overall with the working condition of the elevators, escalators and moving sidewalks, with the proportion very satisfied at Dulles increasing steadily since 2007. The majority are also satisfied with the availability of baggage carts at both airports.

**NATIONAL**

**Working Condition of Elevators, Escalators & Moving Sidewalks**

<table>
<thead>
<tr>
<th>Year</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>CY 2007</td>
<td>24.0</td>
<td>65.0</td>
<td>1.0</td>
</tr>
<tr>
<td>CY 2008</td>
<td>31.6</td>
<td>63.9</td>
<td>4.5</td>
</tr>
<tr>
<td>CY 2009</td>
<td>31.9</td>
<td>64.0</td>
<td>4.1</td>
</tr>
<tr>
<td>CY 2010</td>
<td>33.3</td>
<td>63.2</td>
<td>3.5</td>
</tr>
</tbody>
</table>

**DULLES**

**Working Condition of Elevators, Escalators & Moving Sidewalks**

<table>
<thead>
<tr>
<th>Year</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>CY 2007</td>
<td>29.7</td>
<td>66.8</td>
<td>3.5</td>
</tr>
<tr>
<td>CY 2008</td>
<td>34.4</td>
<td>63.3</td>
<td>2.3</td>
</tr>
<tr>
<td>CY 2009</td>
<td>37.0</td>
<td>60.3</td>
<td>2.3</td>
</tr>
<tr>
<td>CY 2010</td>
<td>39.2</td>
<td>58.4</td>
<td>2.4</td>
</tr>
<tr>
<td>CY 2011</td>
<td>40.5</td>
<td>58.0</td>
<td>1.6</td>
</tr>
</tbody>
</table>

**Availability of Baggage Carts**

<table>
<thead>
<tr>
<th>Year</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>CY 2007</td>
<td>16.9</td>
<td>64.2</td>
<td>12.9</td>
</tr>
<tr>
<td>CY 2008</td>
<td>27.5</td>
<td>64.9</td>
<td>8.3</td>
</tr>
<tr>
<td>CY 2009</td>
<td>27.5</td>
<td>67.4</td>
<td>7.5</td>
</tr>
<tr>
<td>CY 2010</td>
<td>30.1</td>
<td>63.0</td>
<td>6.9</td>
</tr>
</tbody>
</table>

**Availability of Baggage Carts**

<table>
<thead>
<tr>
<th>Year</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>CY 2007</td>
<td>21.7</td>
<td>63.5</td>
<td>14.8</td>
</tr>
<tr>
<td>CY 2008</td>
<td>30.8</td>
<td>60.3</td>
<td>9.0</td>
</tr>
<tr>
<td>CY 2009</td>
<td>30.5</td>
<td>61.1</td>
<td>9.9</td>
</tr>
<tr>
<td>CY 2010</td>
<td>31.9</td>
<td>58.2</td>
<td>8.2</td>
</tr>
</tbody>
</table>

How satisfied are you with the following (Airport Services)?

A significant proportion at both airports remain dissatisfied with the variety of and/or food prices at eating places.

How satisfied are you with the following (Airport Services)?

Overall satisfaction with the quality of food and service at eating places has remained relatively consistent at National and Dulles.


*Question wording changed in 2011 from “Quality of Service…” to “Customer Service…”*
How satisfied are you with the following (Airport Services)?

Dulles passengers are slightly more likely to be satisfied with the variety of retail shops than National passengers.

**NATIONAL**

**Variety of Retail Shops (Including Bookstores)**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Satisfied</td>
<td>14.6</td>
<td>14.4</td>
<td>17.2</td>
<td>16.5</td>
</tr>
<tr>
<td>Satisfied</td>
<td>64.3</td>
<td>66.7</td>
<td>65.0</td>
<td>63.0</td>
</tr>
<tr>
<td>Dissatisfied</td>
<td>21.1</td>
<td>18.9</td>
<td>17.9</td>
<td>20.5</td>
</tr>
</tbody>
</table>

**Prices of Retail Shop Items (Including Bookstores)**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Satisfied</td>
<td>9.4</td>
<td>11.0</td>
<td>14.2</td>
<td>12.6</td>
</tr>
<tr>
<td>Satisfied</td>
<td>65.5</td>
<td>63.7</td>
<td>61.0</td>
<td>59.6</td>
</tr>
<tr>
<td>Dissatisfied</td>
<td>25.0</td>
<td>25.4</td>
<td>24.9</td>
<td>27.8</td>
</tr>
</tbody>
</table>

**DULLES**

**Variety of Retail Shops (Including Bookstores)**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Satisfied</td>
<td>14.9</td>
<td>21.3</td>
<td>18.2</td>
<td>19.1</td>
</tr>
<tr>
<td>Satisfied</td>
<td>61.1</td>
<td>63.4</td>
<td>66.0</td>
<td>65.4</td>
</tr>
<tr>
<td>Dissatisfied</td>
<td>24.0</td>
<td>15.4</td>
<td>15.8</td>
<td>15.5</td>
</tr>
</tbody>
</table>

**Prices of Retail Shop Items (Including Bookstores)**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Satisfied</td>
<td>11.3</td>
<td>16.8</td>
<td>14.4</td>
<td>14.3</td>
</tr>
<tr>
<td>Satisfied</td>
<td>57.6</td>
<td>61.8</td>
<td>61.8</td>
<td>63.5</td>
</tr>
<tr>
<td>Dissatisfied</td>
<td>31.0</td>
<td>21.3</td>
<td>23.8</td>
<td>22.2</td>
</tr>
</tbody>
</table>

How satisfied are you with the following (Airport Services)?
The vast majority of passengers at both airports remain satisfied overall with the customer service and quality of merchandise at retail shops.

*Question wording changed in 2011 from “Quality of Service…” to “Customer Service…”*
How satisfied are you with the following (Airport Services)?

Overall satisfaction with duty-free shops at Dulles has increased since 2010, with the proportion very satisfied trending higher since 2009.

DULLES

Duty-Free Shops/Kiosks

The proportion of Dulles passengers satisfied with the prices of duty-free shop items has increased in 2011 ending a decreasing trend from 2008 to 2010.

How satisfied are you with the following (Airport Services)?

About two in ten respondents at both airports remain dissatisfied with the prices of newsstand items, though the proportion very satisfied has increased at National since 2008.

How satisfied are you with the following (Airport Services)?

The vast majority of respondents at both airports continue to be satisfied with the customer service and quality of merchandise at the newsstands, though the proportion very satisfied with the customer service and quality of merchandise at newsstands has steadily increased at National since 2007 and at Dulles since 2009.


*Question wording changed in 2011 from “Quality of Service…” to “Customer Service…”*
How satisfied are you with the following (Airport Services)?

Overall satisfaction with *Washington Flyer* magazine decreased slightly in 2011 at both airports, while overall satisfaction with airline clubs increased.

How satisfied are you with the following (Airport Services)?

The vast majority of passengers at either airport are satisfied with the currency exchange and cell phone coverage.

How satisfied are you with the following (Airport Services)?

Overall satisfaction with the overall ability to access the Internet and WiFi Internet access increased in 2011 at both National and Dulles.

**NATIONAL**

**Overall Ability to Access the Internet**

<table>
<thead>
<tr>
<th></th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>CY 2007</td>
<td>13.1</td>
<td>16.0</td>
<td>22.2</td>
</tr>
<tr>
<td>CY 2008</td>
<td>22.2</td>
<td>23.5</td>
<td>28.7</td>
</tr>
<tr>
<td>CY 2009</td>
<td>37.2</td>
<td>55.1</td>
<td>52.4</td>
</tr>
<tr>
<td>CY 2010</td>
<td>49.7</td>
<td>54.2</td>
<td></td>
</tr>
<tr>
<td>CY 2011</td>
<td>20.2</td>
<td>22.6</td>
<td>24.1</td>
</tr>
</tbody>
</table>

**WiFi Internet Access**

<table>
<thead>
<tr>
<th></th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>CY 2008</td>
<td>17.2</td>
<td>22.9</td>
<td>30.7</td>
</tr>
<tr>
<td>CY 2009</td>
<td>47.6</td>
<td>48.5</td>
<td>50.6</td>
</tr>
<tr>
<td>CY 2010</td>
<td>58.3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CY 2011</td>
<td>24.5</td>
<td>29.5</td>
<td>29.4</td>
</tr>
</tbody>
</table>

**DULLES**

**Overall Ability to Access the Internet**

<table>
<thead>
<tr>
<th></th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>CY 2007</td>
<td>19.5</td>
<td>22.2</td>
<td>22.4</td>
</tr>
<tr>
<td>CY 2008</td>
<td>38.7</td>
<td>38.7</td>
<td>30.7</td>
</tr>
<tr>
<td>CY 2009</td>
<td>41.8</td>
<td>54.1</td>
<td>55.0</td>
</tr>
<tr>
<td>CY 2010</td>
<td>19.5</td>
<td>55.1</td>
<td>52.6</td>
</tr>
<tr>
<td>CY 2011</td>
<td>23.7</td>
<td>22.3</td>
<td>27.9</td>
</tr>
</tbody>
</table>

**WiFi Internet Access**

<table>
<thead>
<tr>
<th></th>
<th>Very Satisfied</th>
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</thead>
<tbody>
<tr>
<td>CY 2008</td>
<td>22.4</td>
<td>23.2</td>
<td>19.4</td>
</tr>
<tr>
<td>CY 2009</td>
<td>33.0</td>
<td>50.7</td>
<td>50.1</td>
</tr>
<tr>
<td>CY 2010</td>
<td>50.1</td>
<td>49.2</td>
<td>26.9</td>
</tr>
<tr>
<td>CY 2011</td>
<td>52.4</td>
<td>26.6</td>
<td>26.6</td>
</tr>
</tbody>
</table>

How satisfied are you with the following (Leaving the Airport)?

The proportion satisfied overall with Customs and Border Patrol clearance decreased in 2011 continuing a decreasing trend since 2009. Overall satisfaction with the timeliness of Customs and Border Patrol has also experienced a decreasing trend since 2008.

The majority of Dulles passengers are satisfied with the timeliness of mobile lounge transfers, while more than one-fourth are very satisfied.

Timeliness of Mobile Lounge Transfer to IAB

Notes: Question “Timeliness of the Mobile Lounge Transfer to International Arrivals Building” added in 2011
How satisfied are you with the following (Leaving the Airport)?

Overall satisfaction with the signs to the baggage claim area remained high at National and Dulles. Meanwhile those satisfied with baggage claim information displays has decreased at National since 2007.

How satisfied are you with the following (Leaving the Airport)?

Overall satisfaction with the timely delivery of baggage to the baggage claim area increased at Dulles in 2011.

How satisfied are you with the following (Leaving the Airport)?
The vast majority of National and Dulles respondents remain satisfied overall with the signs to taxi service.

**Overall satisfaction with signs to the Washington Flyer Coach at Dulles has remained relatively consistent since 2008.**

How satisfied are you with the following (Leaving the Airport)?

The vast majority of respondents at both airports are satisfied overall with the availability of taxi service to leave the airport, and satisfaction with the price of taxi service increased in 2011.

**NATIONAL**

**Availability of Taxi Service to Leave Airport**

**Price of Taxi Service to Leave Airport**

**DULLES**

**Availability of Taxi Service to Leave Airport**

**Price of Taxi Service to Leave Airport**

How satisfied are you with the following (Leaving the Airport)?

Overall satisfaction with the professionalism of the taxi driver and the cleanliness and condition of taxis has increased slightly in 2011 at both airports.

How satisfied are you with the following (Leaving the Airport)?
Approximately one-fourth of passengers at both National and Dulles are very satisfied with signs to public transportation.

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Very Satisfied</td>
<td>24.5</td>
<td>65.9</td>
<td>69.3</td>
<td>65.9</td>
</tr>
<tr>
<td>Satisfied</td>
<td>21.3</td>
<td>23.6</td>
<td>25.9</td>
<td>12.7</td>
</tr>
<tr>
<td>Dissatisfied</td>
<td>9.6</td>
<td>9.3</td>
<td>10.0</td>
<td>10.0</td>
</tr>
</tbody>
</table>

How satisfied are you with the following (Leaving the Airport)?

Overall satisfaction with the availability and price of public transportation to leave both airports increased in 2011 at both airports.

How satisfied are you with the following (Leaving the Airport)?
Overall satisfaction with the signs to the Super Shuttle at National and Dulles increased from last year at both airports.

How satisfied are you with the following (Leaving the Airport)?

While overall satisfaction with Super Shuttle service to leave the airport increased at National in 2011, overall satisfaction with other shared ride service increased at both airports.

**NATIONAL**

Super Shuttle Service to Leave Airport

- **Very Satisfied:**
  - CY 2007: 21.7%
  - CY 2008: 29.0%
  - CY 2009: 68.8%
  - CY 2010: 63.2%
  - CY 2011: 69.4%

- **Satisfied:**
  - CY 2007: 18.7%
  - CY 2008: 60.8%
  - CY 2009: 12.6%
  - CY 2010: 10.2%
  - CY 2011: 7.5%

- **Dissatisfied:**
  - CY 2007: 9.5%
  - CY 2008: 12.6%
  - CY 2009: 6.8%
  - CY 2010: 13.1%
  - CY 2011: 7.5%

**DULLES**

Super Shuttle Service to Leave Airport

- **Very Satisfied:**
  - CY 2007: 16.8%
  - CY 2008: 27.1%
  - CY 2009: 21.0%
  - CY 2010: 24.5%
  - CY 2011: 24.0%

- **Satisfied:**
  - CY 2007: 65.5%
  - CY 2008: 69.9%
  - CY 2009: 64.3%
  - CY 2010: 63.3%
  - CY 2011: 69.4%

- **Dissatisfied:**
  - CY 2007: 17.7%
  - CY 2008: 14.2%
  - CY 2009: 9.1%
  - CY 2010: 12.7%
  - CY 2011: 7.5%

**Other Shared Ride, Door-to-Door Van Shuttle Service**

- **Very Satisfied:**
  - CY 2007: 23.2%
  - CY 2008: 30.5%
  - CY 2009: 28.2%
  - CY 2010: 26.8%
  - CY 2011: 28.5%

- **Satisfied:**
  - CY 2007: 68.7%
  - CY 2008: 59.3%
  - CY 2009: 67.2%
  - CY 2010: 60.1%
  - CY 2011: 64.3%

- **Dissatisfied:**
  - CY 2007: 8.1%
  - CY 2008: 14.5%
  - CY 2009: 6.8%
  - CY 2010: 13.3%
  - CY 2011: 7.2%

**Other Shared Ride, Door-to-Door Van Shuttle Service**

- **Very Satisfied:**
  - CY 2007: 16.9%
  - CY 2008: 10.2%
  - CY 2009: 4.6%
  - CY 2010: 13.3%
  - CY 2011: 7.2%

- **Satisfied:**
  - CY 2007: 68.6%
  - CY 2008: 59.3%
  - CY 2009: 67.2%
  - CY 2010: 60.1%
  - CY 2011: 64.3%

- **Dissatisfied:**
  - CY 2007: 14.5%
  - CY 2008: 4.6%
  - CY 2009: 13.3%
  - CY 2010: 7.2%
  - CY 2011: 7.2%

How satisfied are you with the following (Leaving the Airport)?

Overall satisfaction with shuttle bus service to airport parking and terminals and the ease of exiting parking facilities remained high at both airports.

The proportion of passengers satisfied overall with the signs and locations for Pay & Go at Dulles increased in 2011.

**DULLES**

**Signs for Pay & Go**

The proportion satisfied overall with the availability and number of Pay & Go machines at Dulles increased in 2011.

**DULLES**

**Pay & Go Machine Locations**

**Availability/Number of Pay & Go Machines**

How satisfied are you with the following (Leaving the Airport)?

Overall satisfaction among National and Dulles passengers with the roads to leave the airport and roadway signs to leave the airport remained relatively consistent from 2010 to 2011.

How satisfied are you with the following (Rental Cars)?

Overall satisfaction with the signs to rental cars and the timeliness of shuttle bus to and from rental car facilities at National increased recently ending a decreasing trend from 2008 to 2010. The proportion of Dulles passengers very satisfied with both has also increased in 2011.

How satisfied are you with the following (Rental Cars)?

The proportion of passengers very satisfied with the availability of rental cars at both airports increased in 2011. In addition, the proportion satisfied overall with the price of rental cars at Dulles increased in 2011.

How satisfied are you with the following (Rental Cars)?
The proportion of passengers at National and Dulles satisfied with the courtesy of rental car employees remains high, continuing and increasing trend at National since 2008.

Other Issues/Special Projects

AeroTrain

Beginning in July 2010, Dulles respondents were asked if they took the AeroTrain and if so, how satisfied they were with it.

- Almost seven in ten Dulles passengers (68%) have ever used the AeroTrain. Among those who took the AeroTrain, nearly eight in ten (79%) are very satisfied with it.
  - Those few who were dissatisfied with the AeroTrain most often stated that it stops too far from the gates (71%).

Flight Availability

The vast majority of respondents (92% National, 93% Dulles) remain satisfied with their ability to go where they need to go, when they need to go, at a price they are willing to pay from the airport where they were surveyed.

- The majority of respondents at both airports (82% National, 82% Dulles) feel that the availability of flights from that airport has remained the same compared to last year. About one in ten (11% National, 13% Dulles) feel this has improved; however, approximately one in twenty (7% National, 5% Dulles) said that the availability of flights has gotten worse since last year.
On this trip through the airport, did you take the AeroTrain, the underground airport train system? How satisfied are you with the AeroTrain at Dulles? About almost seven in ten passengers at Dulles have ever used the AeroTrain, with the majority of users being very satisfied with the AeroTrain.

**Dulles Usage of AeroTrain**

![Bar chart showing usage of AeroTrain in PD4-6 2010 and CY 2011.]

- Yes: 71.5% (PD4-6 2010), 67.9% (CY 2011)
- No: 28.5% (PD4-6 2010), 32.1% (CY 2011)

**DULLES Satisfaction with AeroTrain**

![Bar chart showing satisfaction levels with AeroTrain in PD4-6 2010 and CY 2011.]

- Very Satisfied: 80.2% (PD4-6 2010), 78.9% (CY 2011)
- Satisfied: 17.8% (PD4-6 2010), 19.4% (CY 2011)
- Dissatisfied: 2.0% (PD4-6 2010), 1.7% (CY 2011)

**SOURCE:** MWAA PD4-6 2010 and CY 2011 Passenger Surveys.
How satisfied are you with your ability to go where you need to go, when you need to go, at a price you are willing to pay, from this airport? Is the availability of flights from this airport to specific destinations where you need to go better, about the same or worse than last year?

The vast majority of passengers report that they were satisfied with their ability to go where they need to go and/or that the availability of flights at both airports is the same as last year.

**NATIONAL**

**Ability to Go When/Where Wanted**

<table>
<thead>
<tr>
<th>Year</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>CY 2007</td>
<td>20.4%</td>
<td>71.7%</td>
<td>8.0%</td>
</tr>
<tr>
<td>CY 2008</td>
<td>18.3%</td>
<td>71.4%</td>
<td>10.3%</td>
</tr>
<tr>
<td>CY 2009</td>
<td>21.9%</td>
<td>70.9%</td>
<td>11.5%</td>
</tr>
<tr>
<td>CY 2010</td>
<td>20.0%</td>
<td>68.6%</td>
<td>11.5%</td>
</tr>
<tr>
<td>CY 2011</td>
<td>19.4%</td>
<td>72.6%</td>
<td>8.0%</td>
</tr>
</tbody>
</table>

**Availability of Flights Compared to Last Year**

<table>
<thead>
<tr>
<th>Year</th>
<th>Better</th>
<th>Same</th>
<th>Worse</th>
</tr>
</thead>
<tbody>
<tr>
<td>CY 2007</td>
<td>10.9%</td>
<td>83.5%</td>
<td>5.7%</td>
</tr>
<tr>
<td>CY 2008</td>
<td>6.0%</td>
<td>83.7%</td>
<td>10.3%</td>
</tr>
<tr>
<td>CY 2009</td>
<td>8.2%</td>
<td>84.9%</td>
<td>6.9%</td>
</tr>
<tr>
<td>CY 2010</td>
<td>7.2%</td>
<td>84.2%</td>
<td>6.9%</td>
</tr>
<tr>
<td>CY 2011</td>
<td>11.0%</td>
<td>82.1%</td>
<td>6.9%</td>
</tr>
</tbody>
</table>

**DULLES**

**Ability to Go When/Where Wanted**

<table>
<thead>
<tr>
<th>Year</th>
<th>Very Satisfied</th>
<th>Satisfied</th>
<th>Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>CY 2007</td>
<td>17.5%</td>
<td>72.9%</td>
<td>9.6%</td>
</tr>
<tr>
<td>CY 2008</td>
<td>16.3%</td>
<td>74.3%</td>
<td>9.4%</td>
</tr>
<tr>
<td>CY 2009</td>
<td>18.7%</td>
<td>73.4%</td>
<td>9.4%</td>
</tr>
<tr>
<td>CY 2010</td>
<td>18.7%</td>
<td>74.5%</td>
<td>6.8%</td>
</tr>
<tr>
<td>CY 2011</td>
<td>17.9%</td>
<td>72.6%</td>
<td>7.2%</td>
</tr>
</tbody>
</table>

**Availability of Flights Compared to Last Year**

<table>
<thead>
<tr>
<th>Year</th>
<th>Better</th>
<th>Same</th>
<th>Worse</th>
</tr>
</thead>
<tbody>
<tr>
<td>CY 2007</td>
<td>14.8%</td>
<td>79.2%</td>
<td>5.4%</td>
</tr>
<tr>
<td>CY 2008</td>
<td>9.5%</td>
<td>80.0%</td>
<td>6.0%</td>
</tr>
<tr>
<td>CY 2009</td>
<td>8.5%</td>
<td>83.8%</td>
<td>7.6%</td>
</tr>
<tr>
<td>CY 2010</td>
<td>10.5%</td>
<td>81.8%</td>
<td>7.7%</td>
</tr>
<tr>
<td>CY 2011</td>
<td>13.0%</td>
<td>81.6%</td>
<td>5.4%</td>
</tr>
</tbody>
</table>