

# WASHINGTON-BALTIMORE REGIONAL AIR PASSENGER SURVEY 2017

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## General Findings

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# Map of Air Systems Region



# Key Takeaways

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- **657 Surveyed Flights:** 582 Domestic, 75 International
- **Response Rate Decline:** 27.4% in 2017, continuing a downward trend for the past 4 surveys.
  - Decreased from 33% in 2015
- **TNC Mode Share Increase:** Taxis & TNCs reversed share of use
- **Dominant Travel Purpose by Airport**
  - Business: DCA
  - Personal or Family: BWI
  - Vacation: IAD



# Enplanements

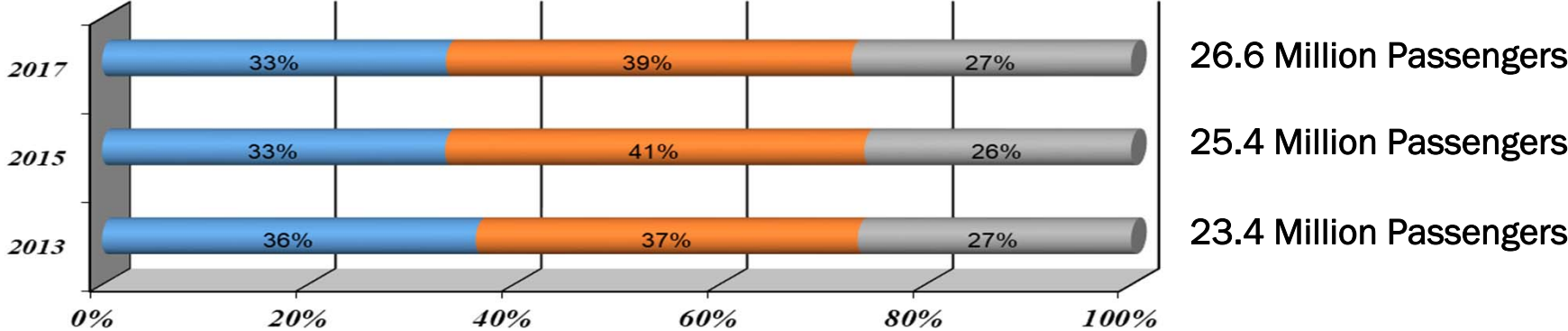
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- Annual air passenger enplanements in 2017 were 2.4 million higher (36.5 million) than in 2015 (34.1 million)
- Local origin enplanements increased at all airports compared with 2015
  - BWI: +5%
  - DCA: +1.3%
  - IAD: +10%
- Connections increased substantially at BWI and DCA; decreased at IAD
  - BWI: + 25%
  - DCA: + 29%
  - IAD: -1.4%

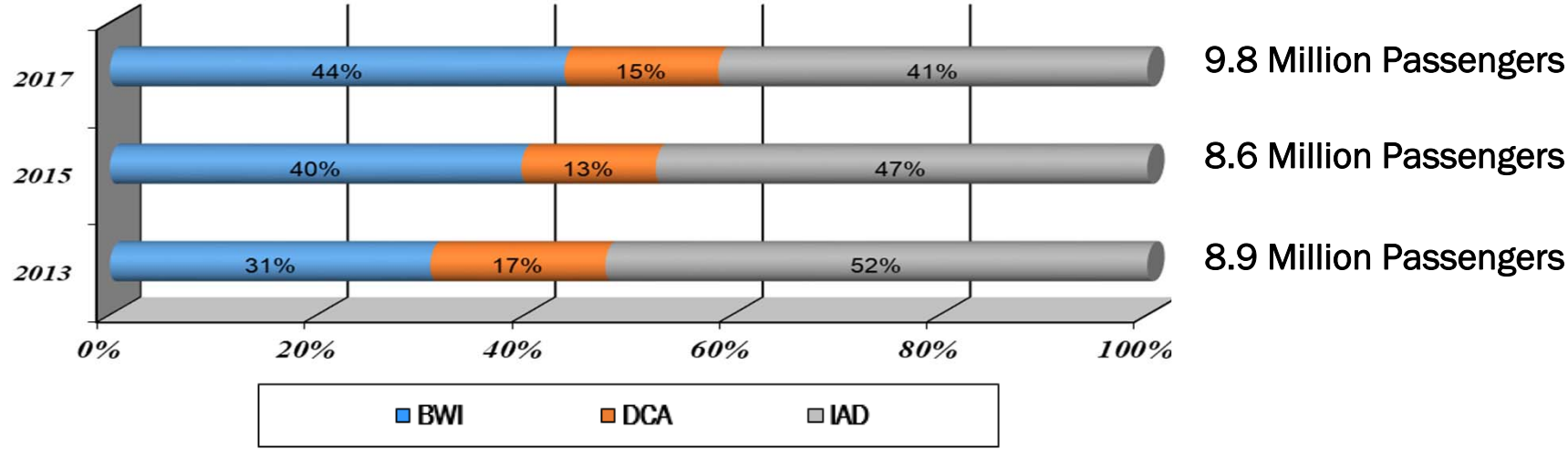


# Airport Share of Locally Originating and Connecting Passengers

## Local Originating Passengers



## Connecting Passengers



# Primary Reason for Selecting Airport

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## Ground Access Considerations

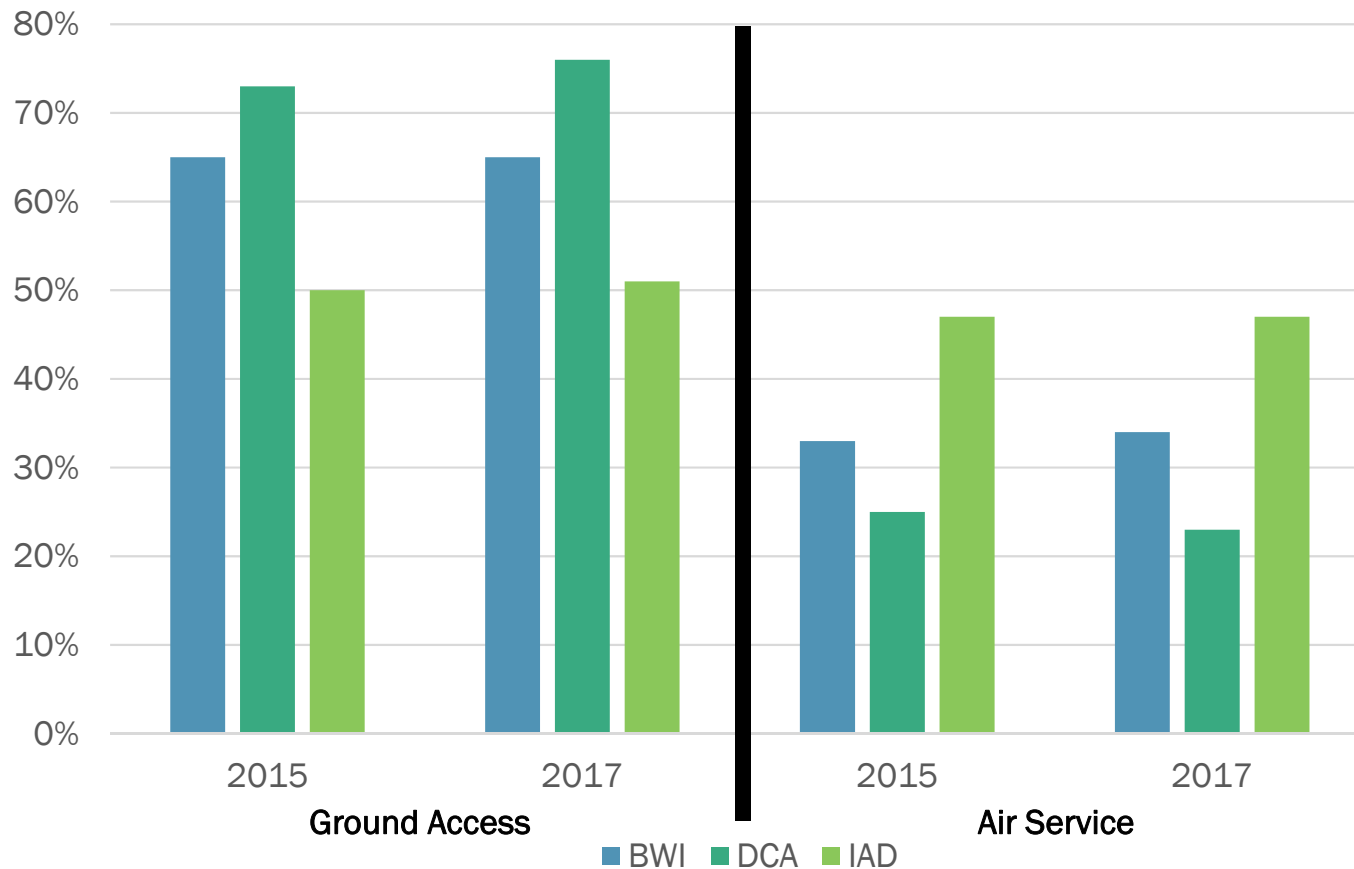
- Closest airport
- Easy Road Access
- Convenient limo, bus, or rail service
- Good parking facilities

## Air Service Considerations

- More convenient flight times
- Less expensive airfare
- Only airport with non-stop flights
- Only airport that serves market
- Frequent flyer specific airline



# Primary Reason for Selecting Airport Ground Access/Air Service



- Accessibility reasons remained unchanged with 65% when compared with 2015



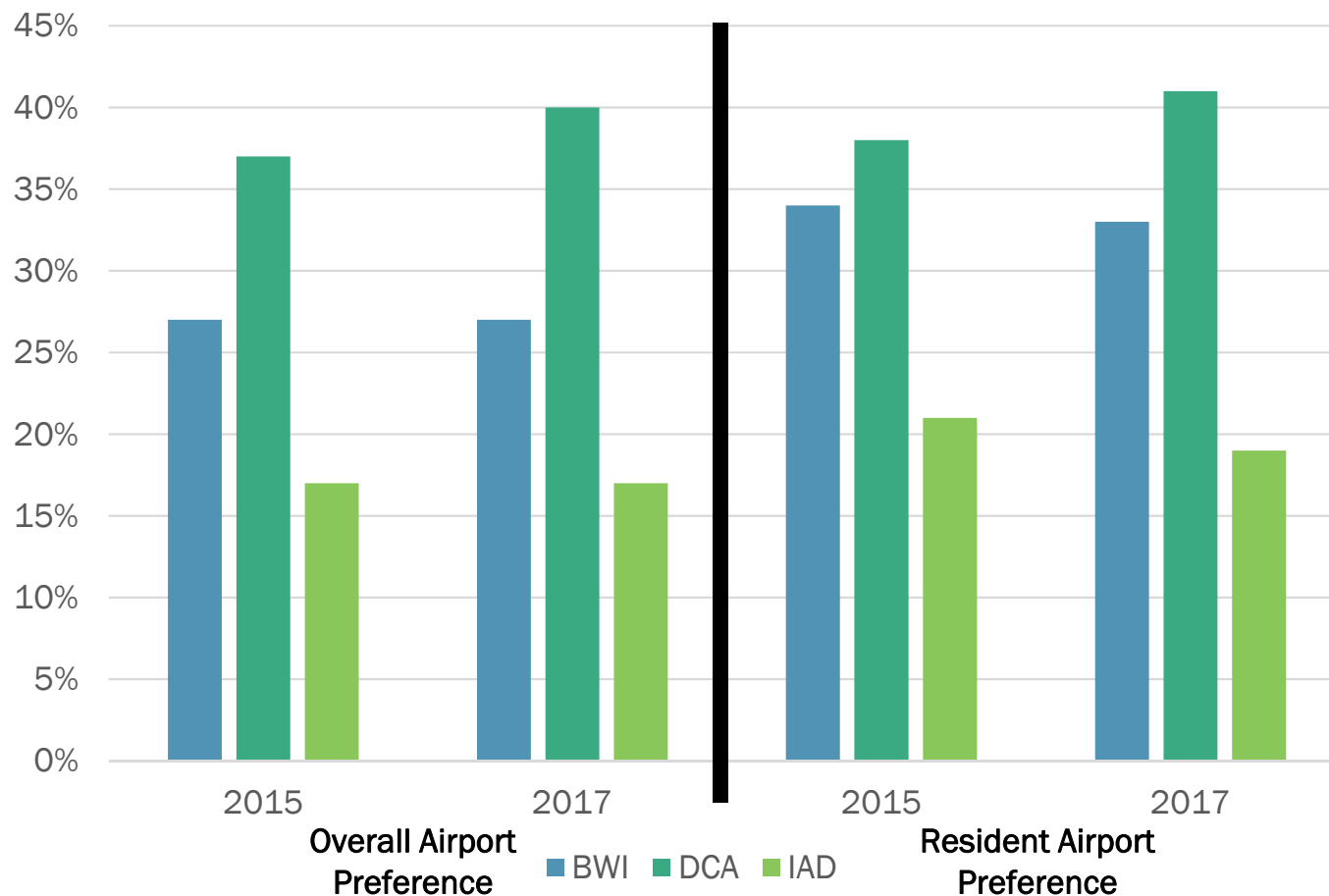
# Primary Reason for Selecting Airport

Reason	BWI	DCA	IAD	Region
<i>Accessibility</i>	65%	76%	51%	65%
<i>Quality of Service</i>	15%	15%	31%	19%
<i>Cost of Service</i>	19%	8%	16%	14%
<i>Other</i>	1%	2%	2%	2%
<b>Total</b>	100%	100%	100%	100%

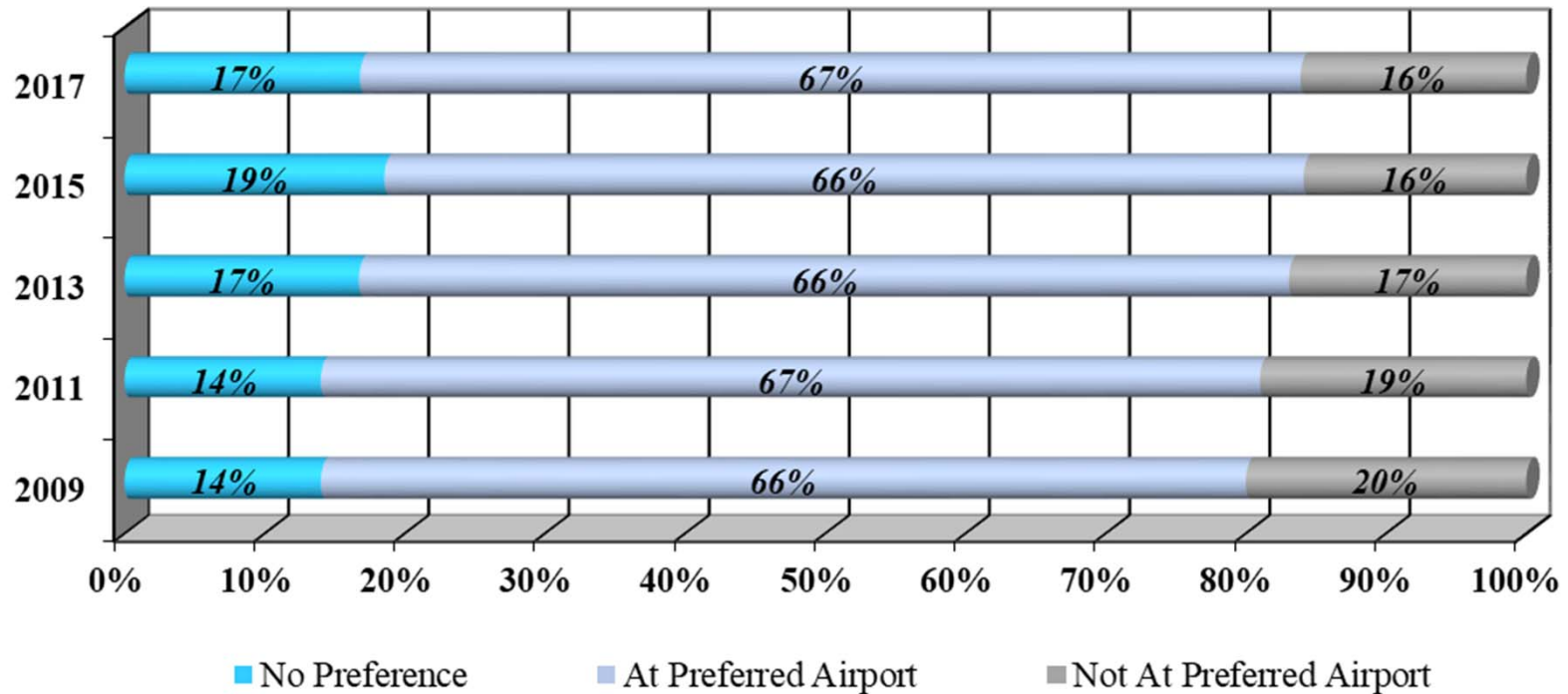




# Airport Preference Comparison, Total/Resident



# Airport Preference (originating passengers)



# Trip Purpose

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## Business

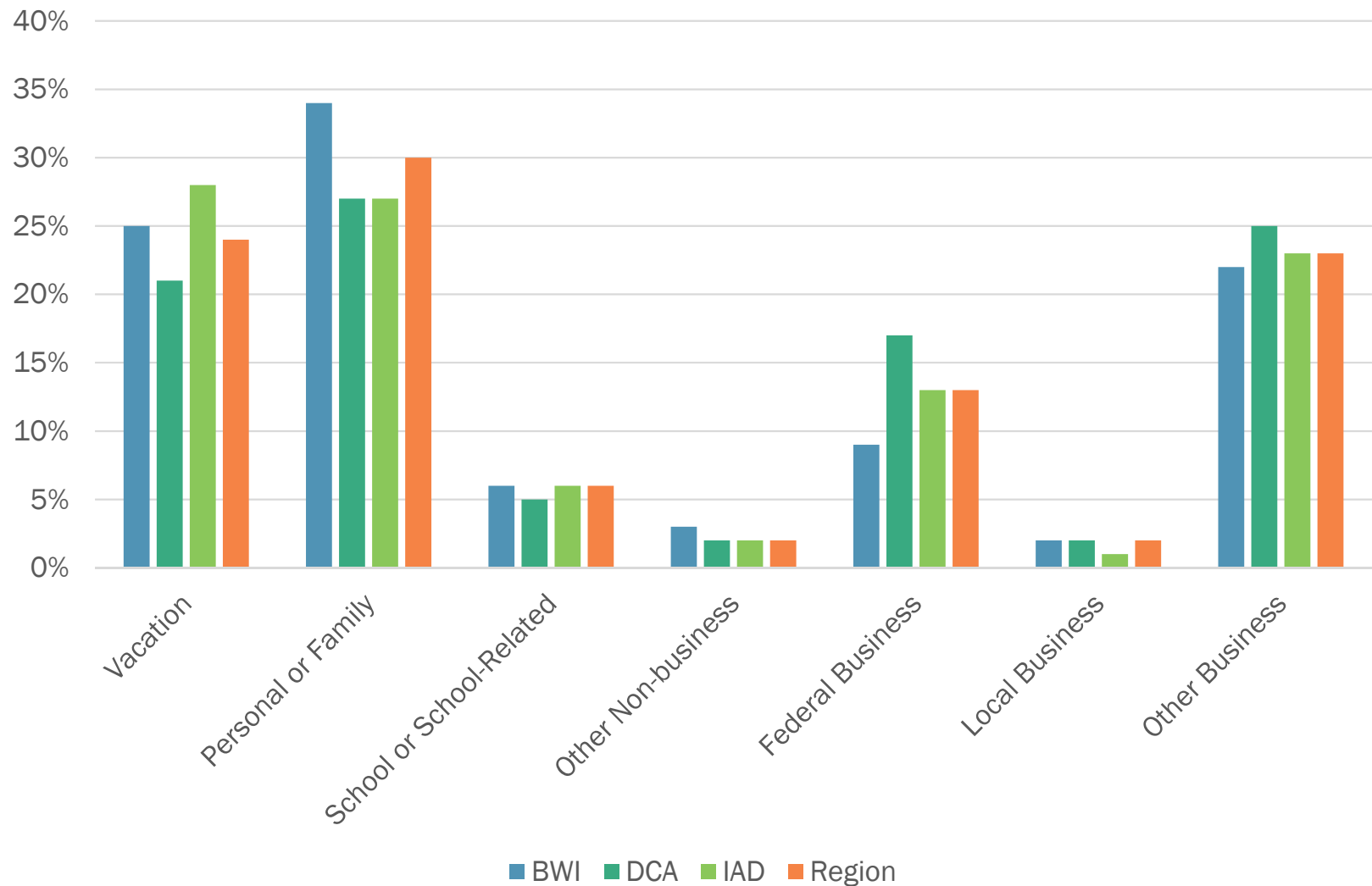
- Related to government (*includes Federal, State and Local*)
- Other non-government related

## Non-Business

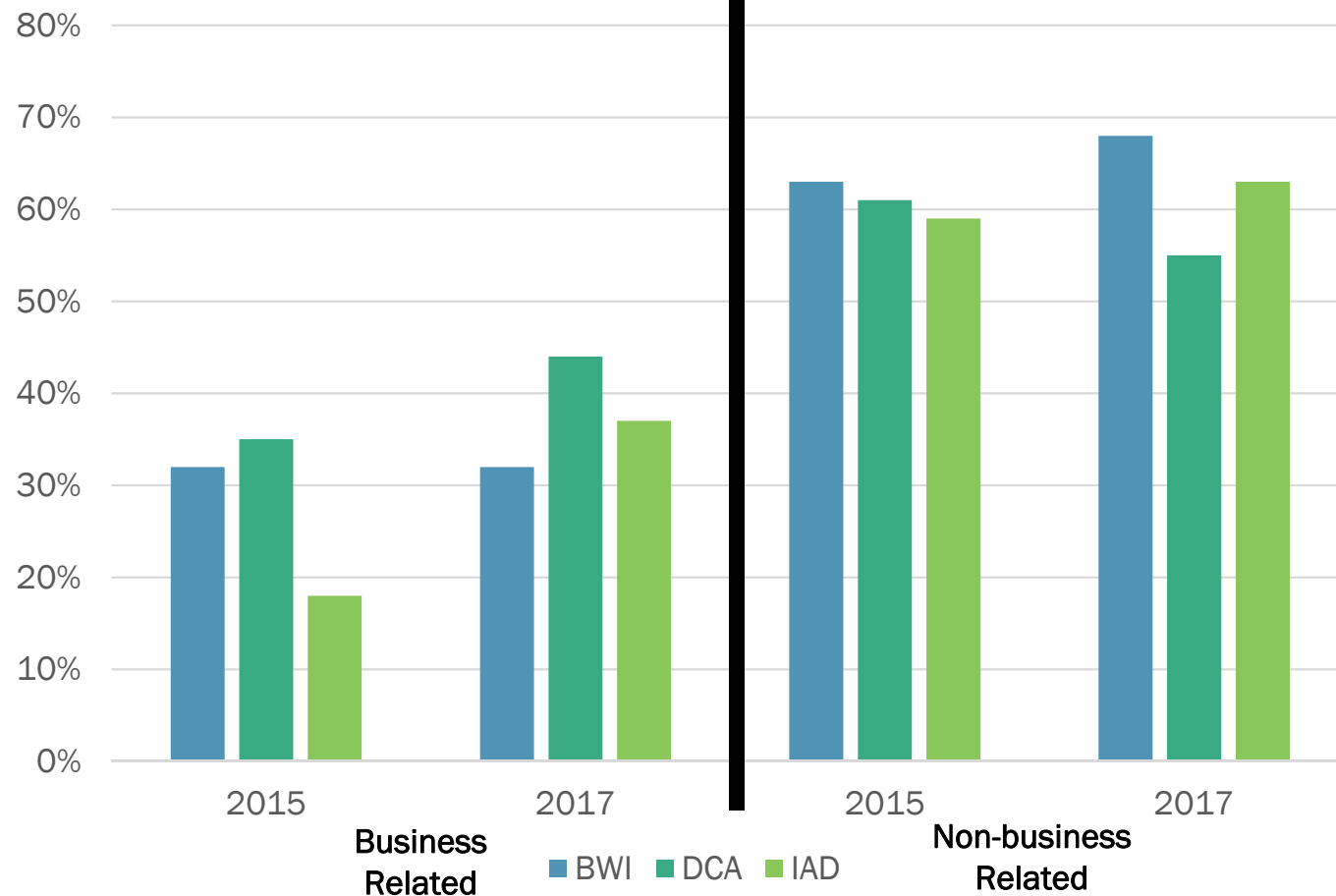
- Vacation
- Personal or family affairs
- Student or school related
- Other



# Annual Originating Air Passengers by Trip Purpose (2017)



# Trip Purpose Comparison, Business Related/Non-business Related



- Business related trip purpose overall increased by 9% while non-business related trips increased by 1% between 2015 and 2017



# Ground Access Trip Origin

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## Home

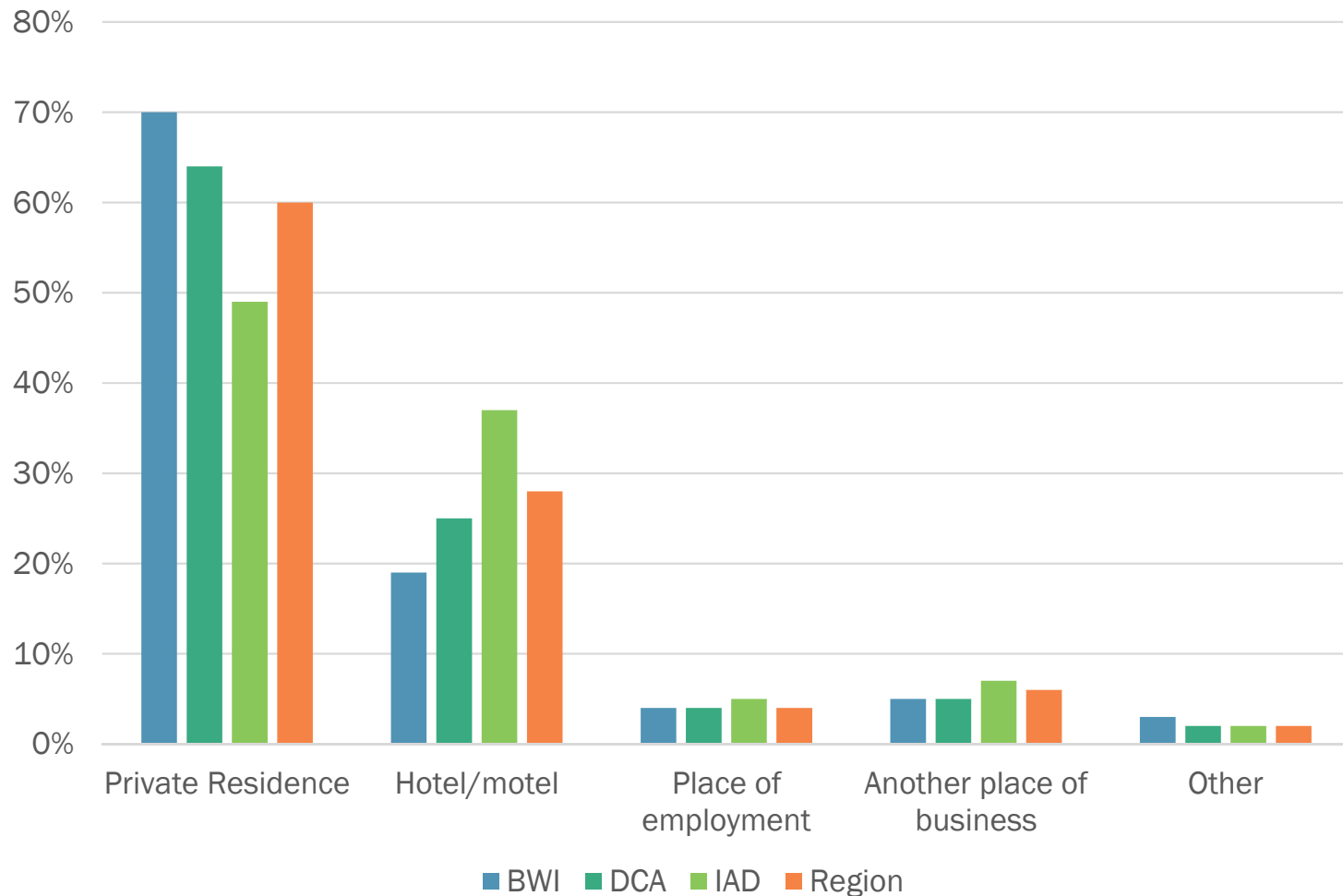
- Private residence

## Non-home

- Hotel/Motel
- Place of employment (work)
- Another place of business
- Other



# Annual Originating Air Passengers by Ground Access Trip Origin (2017)



# Mode Choice for Airport Ground Access

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## Mode of Travel to Airport

- Private car
- Rental Car
- Taxi
- [Transportation Network \(Uber, Lyft, \)](#)
- Metrorail (DCA)
- Rail Service (MARC, VRE)
- Light Rail (BWI)
- Airport Bus/Van/Limo
- Hotel/Motel Courtesy Bus
- Metro Bus/MTA Bus
- Other





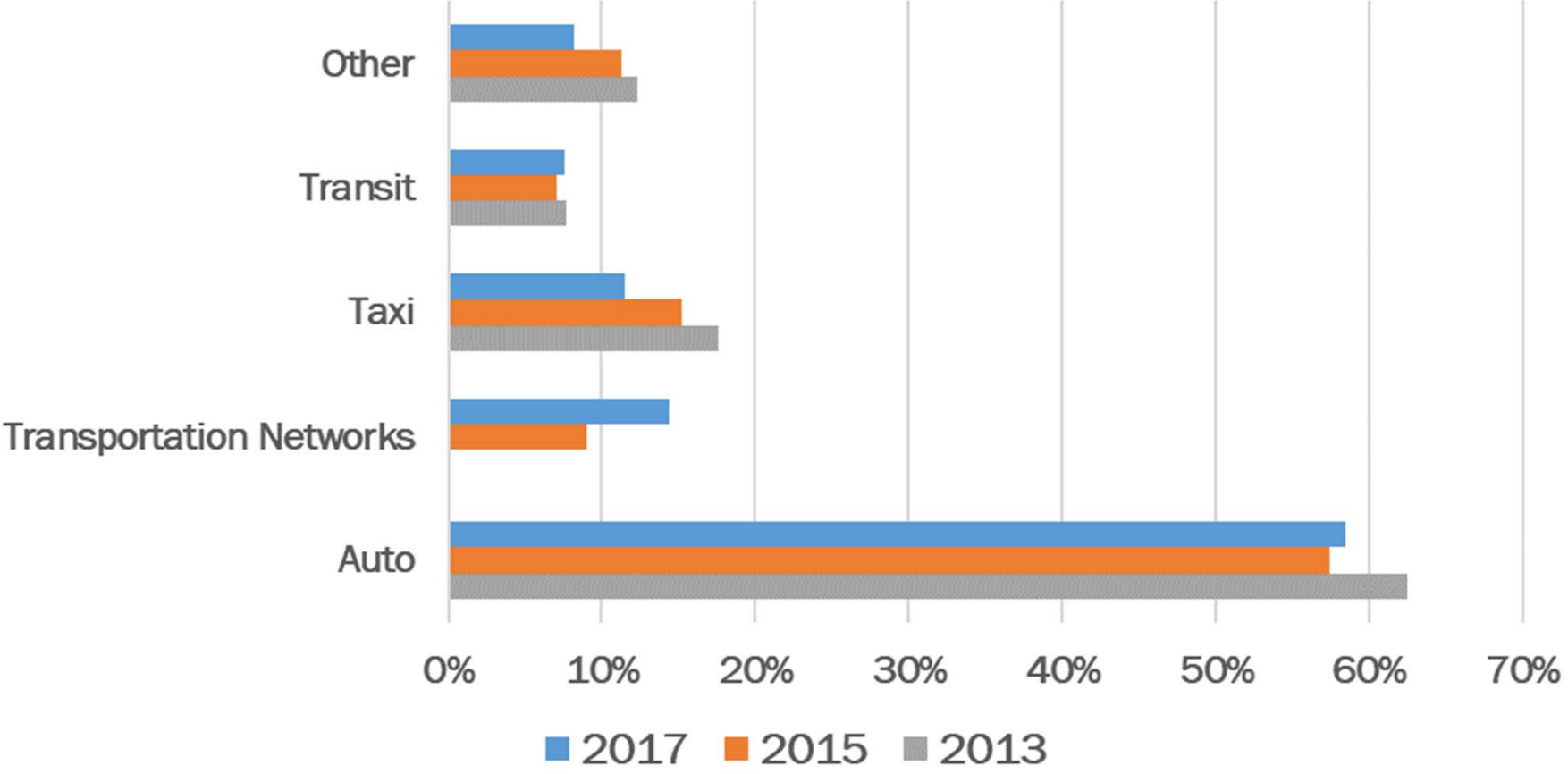
# Mode Choice for Airport Ground Access

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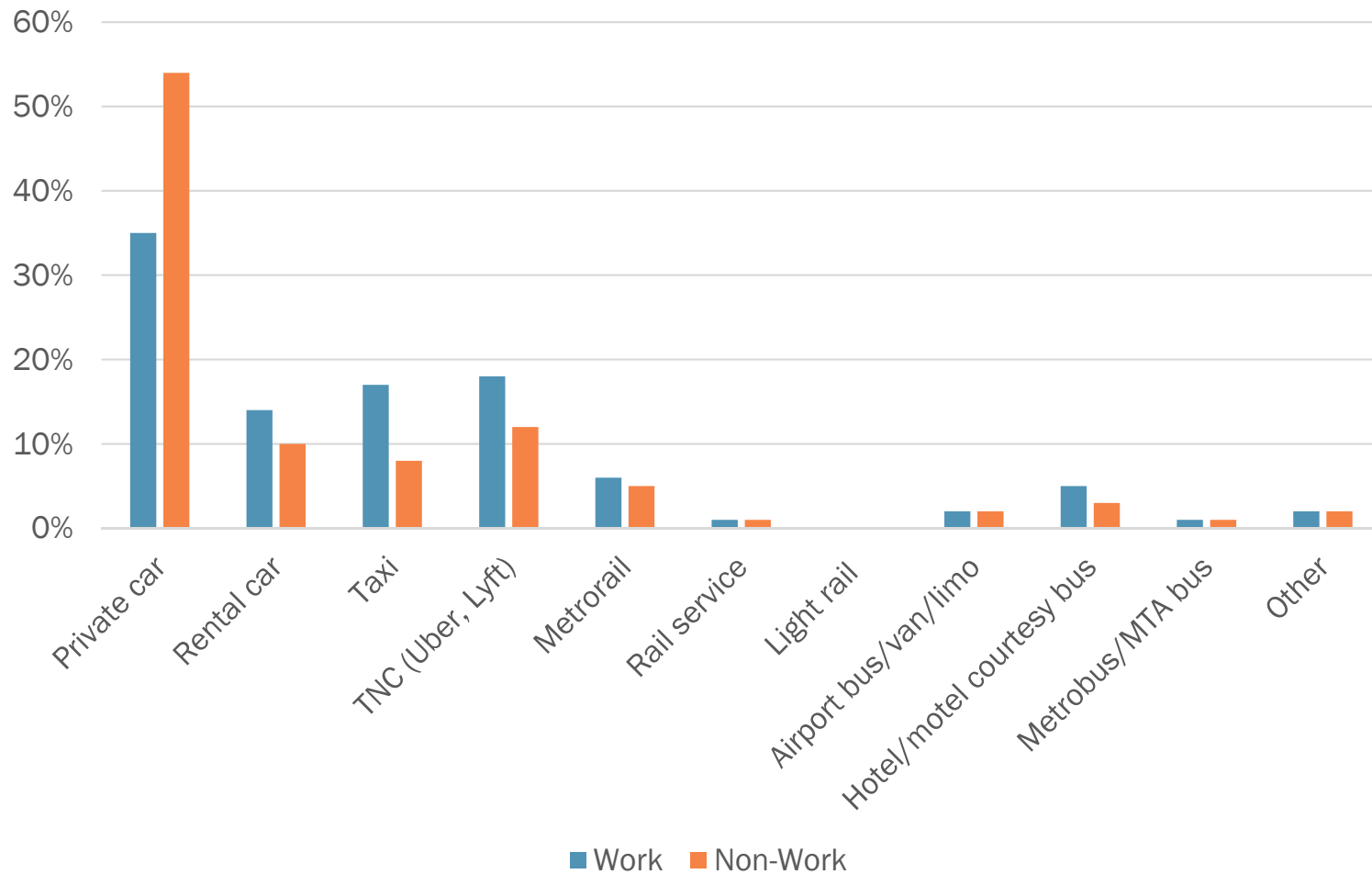
- The most common mode of access to airport continued to be the automobile (private car, rental car, Taxi, transportation networks) accounting for 84% of total trips to all airport.
- Metrorail usage at Reagan National increased to 13% from 12% in 2015
- Air passengers accessing the airport by Transportation Networks accounted for 14% of the total
  - At DCA 21% almost twice than at IAD and 3 times than at BWI
  - Transportation Networks users at DCA accounted for 60% of total
  - The drop of Taxi and rental car trips at DCA could be attributed to Transportation Networks



# Originating Passengers by Mode of Ground Access



# Annual Originating Air Passengers by Mode of Access and Trip Purpose (2017)



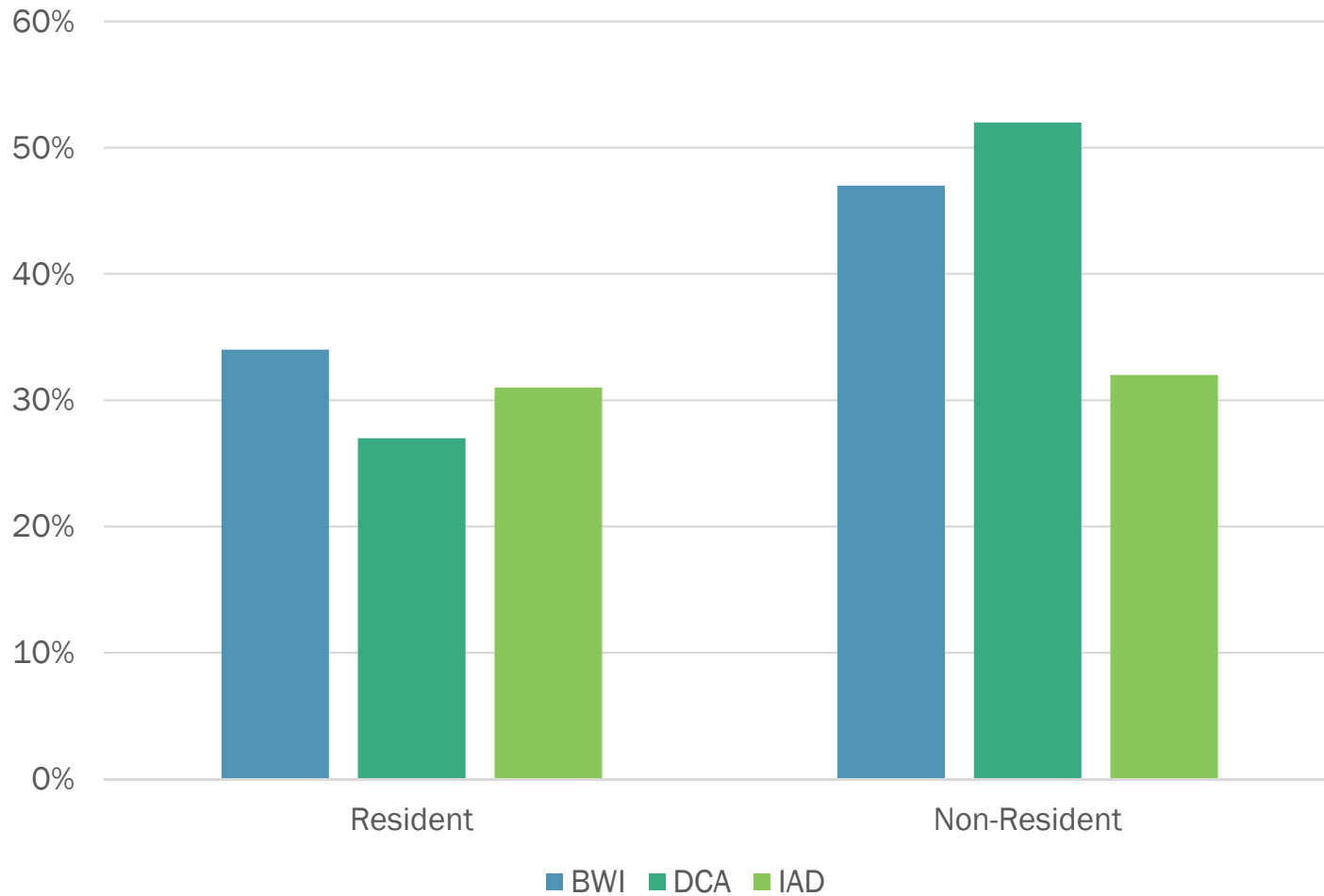
# Air Traveler Characteristics

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- In 2017, most departing air travelers at the region's three major airports were middle-aged, affluent and non-resident.
- Non-resident departing passengers accounted for 60% of total passengers.
- The share of resident departing passengers increased to 40% in 2017, up from 35% in 2015.
- The share of departing passengers under the age of 25 years and over the age of 65 years remained unchanged at 23% when compared with 2015 findings.



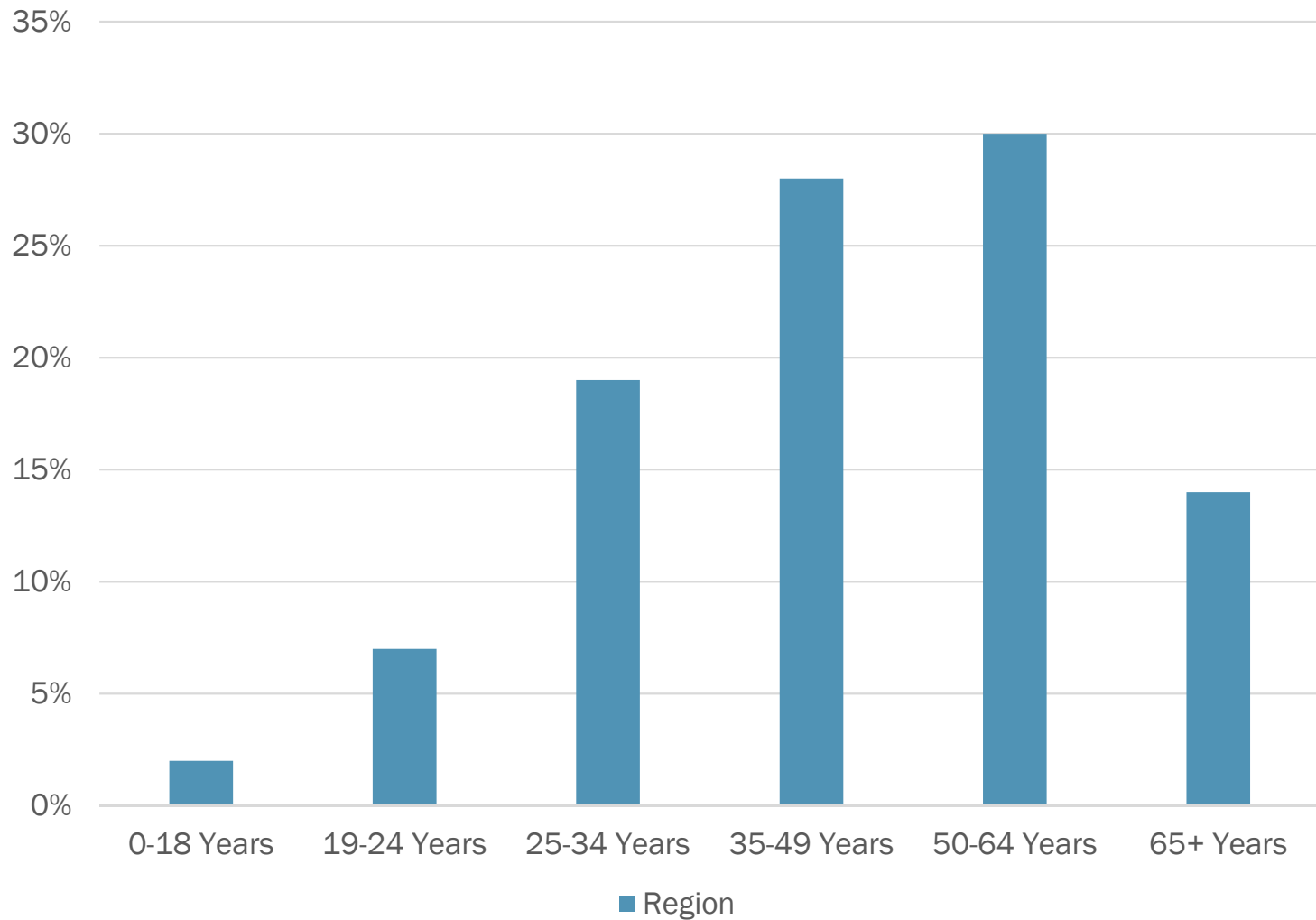
# Annual Originating Air Passengers by Resident Status



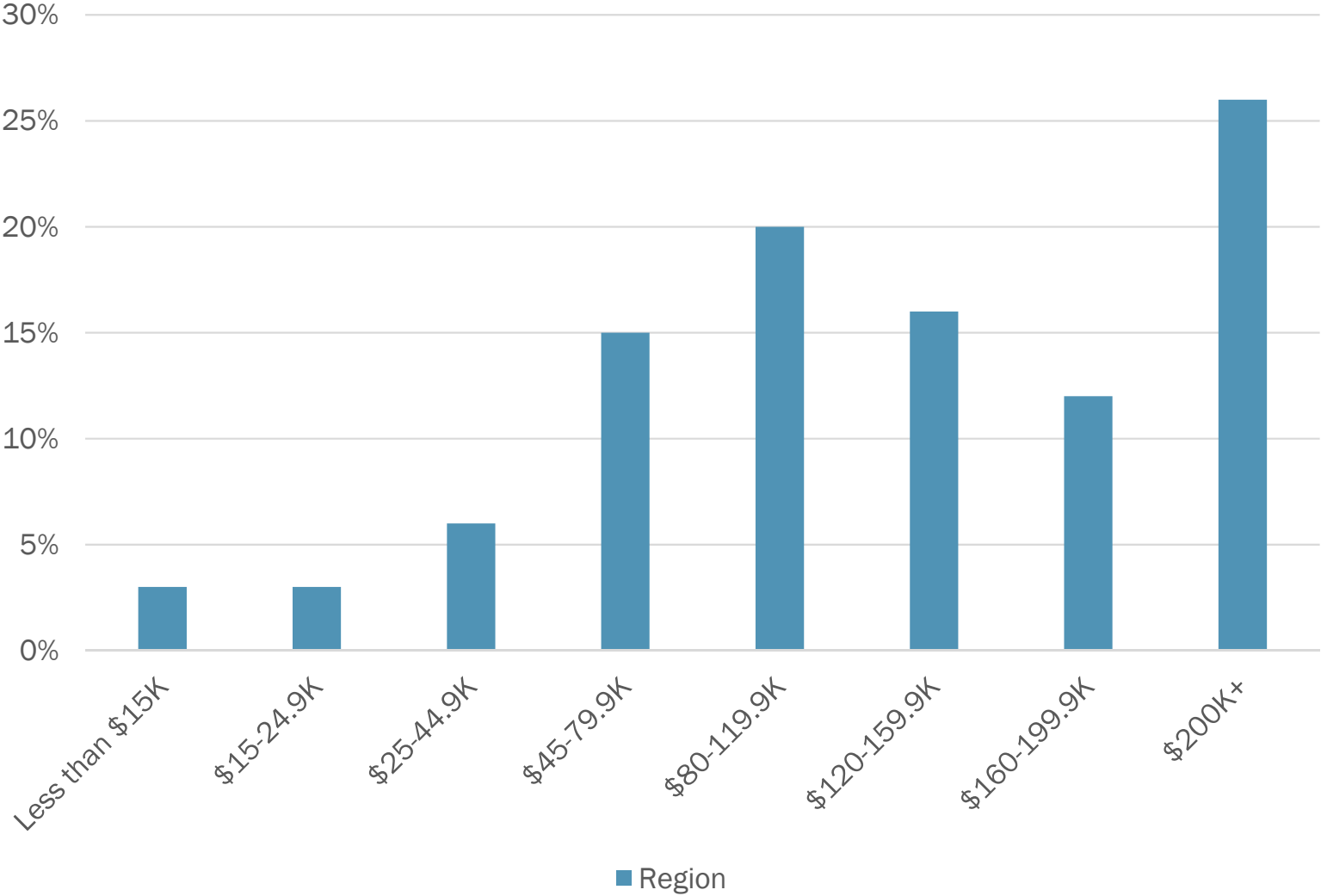
Note 1: "Unknown" not included



# Annual Originating Air Passengers by Age



# Annual Originating Air Passengers by Income



# Next Steps

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- Geo-Code survey file
- Prepare Geographic Findings Report





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**Transportation Planning Board**