

2015 WASHINGTON-BALTIMORE REGIONAL AIR PASSENGER SURVEY

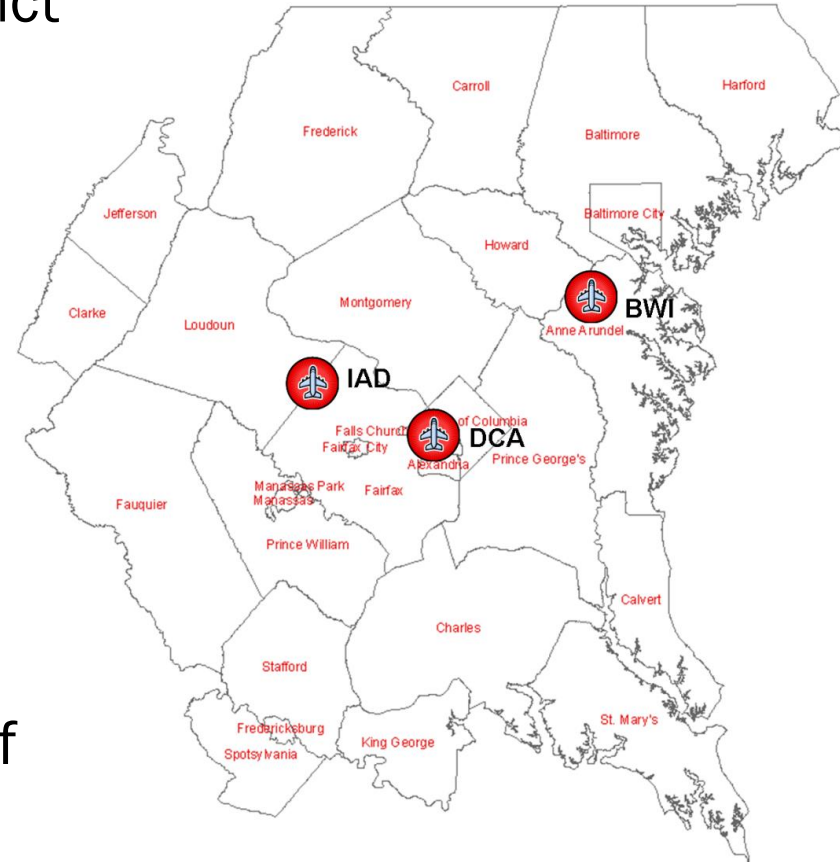
Geographic Findings

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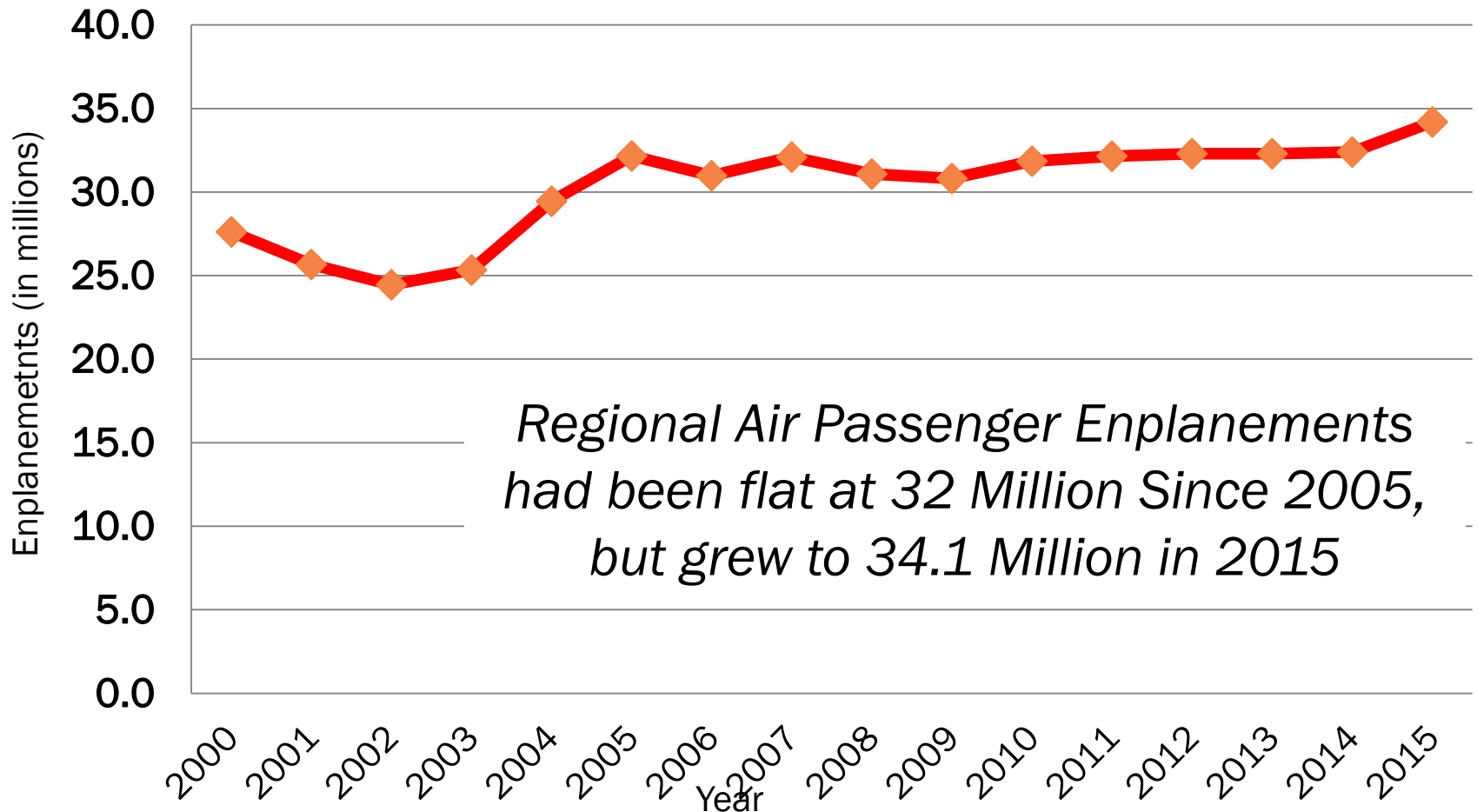
TPB Technical Committee
December 2, 2016

Our Three Commercial Airports are a Key Regional Asset

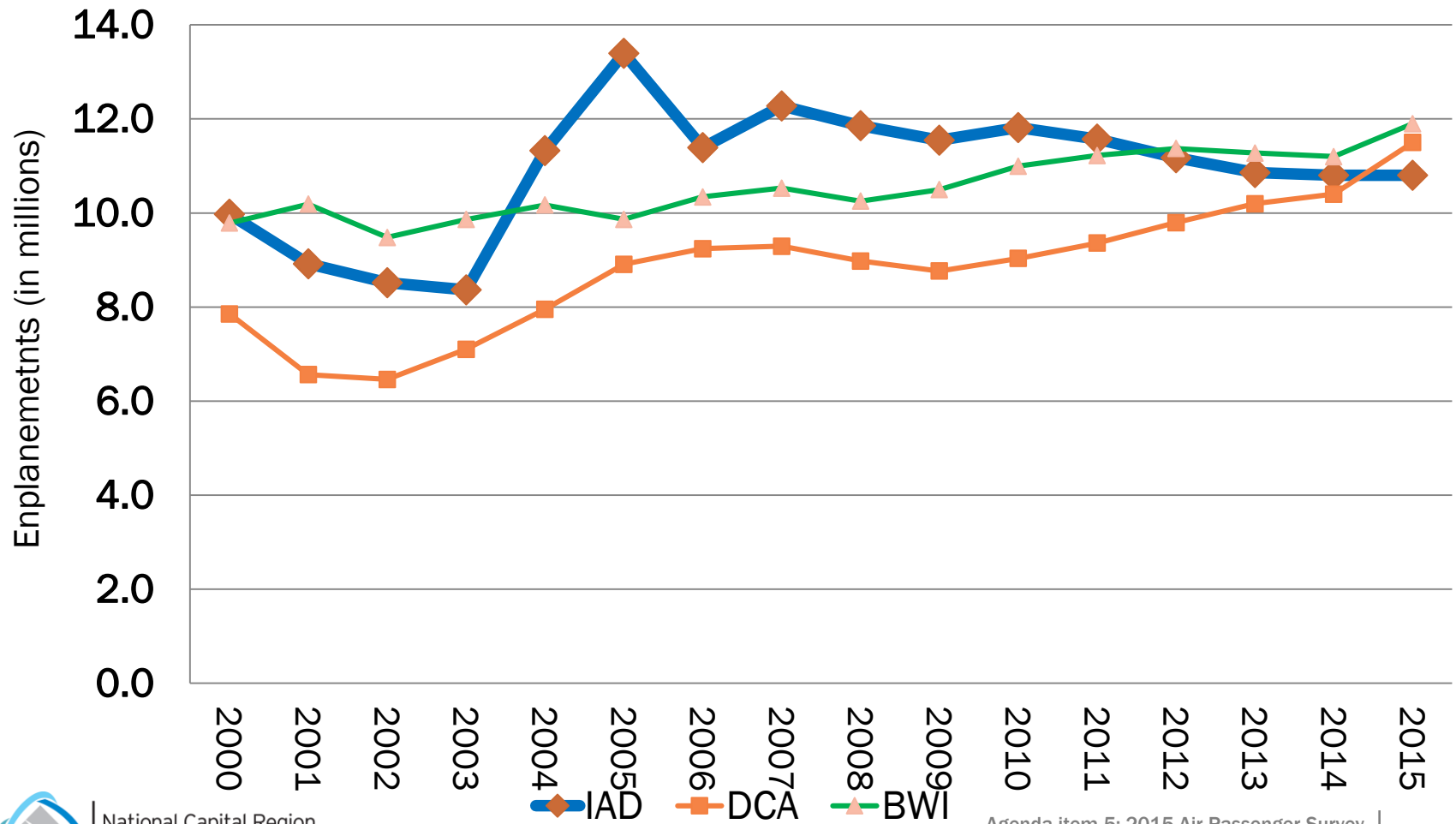
- Three airports with three distinct markets
- Serve air passengers and air cargo
- Multimodal ground access
- Regional air passenger survey every two years
- TPB Aviation Technical Subcommittee has oversight of the CASP Work Program



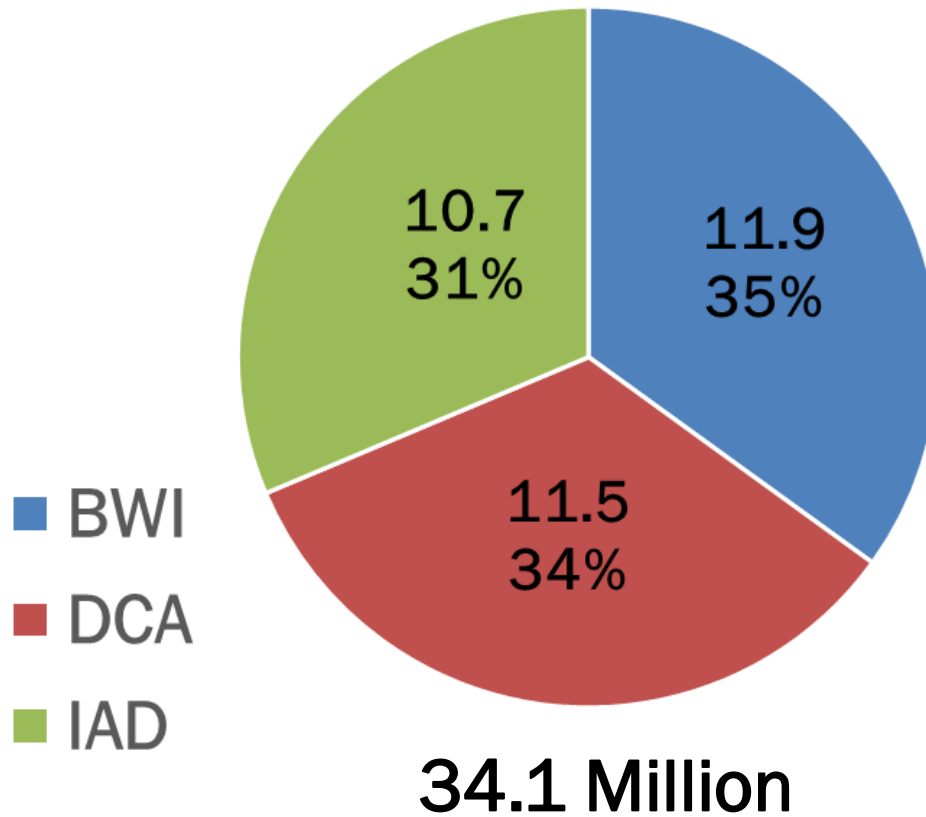
Regional Air Passenger Enplanements Trend (2000-2015)



Regional Air Passenger Enplanements Trend (2000-2015) by Airport

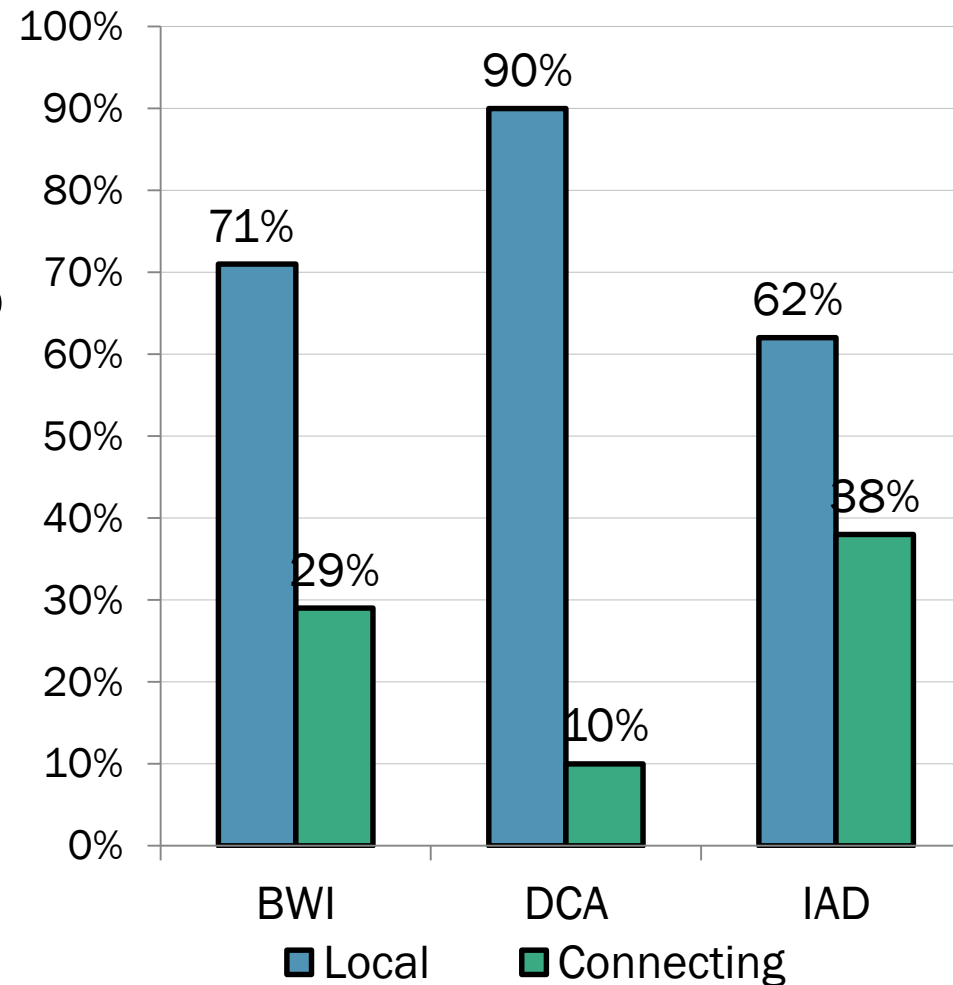


2015 Regional Air Passenger Enplanements by Airport

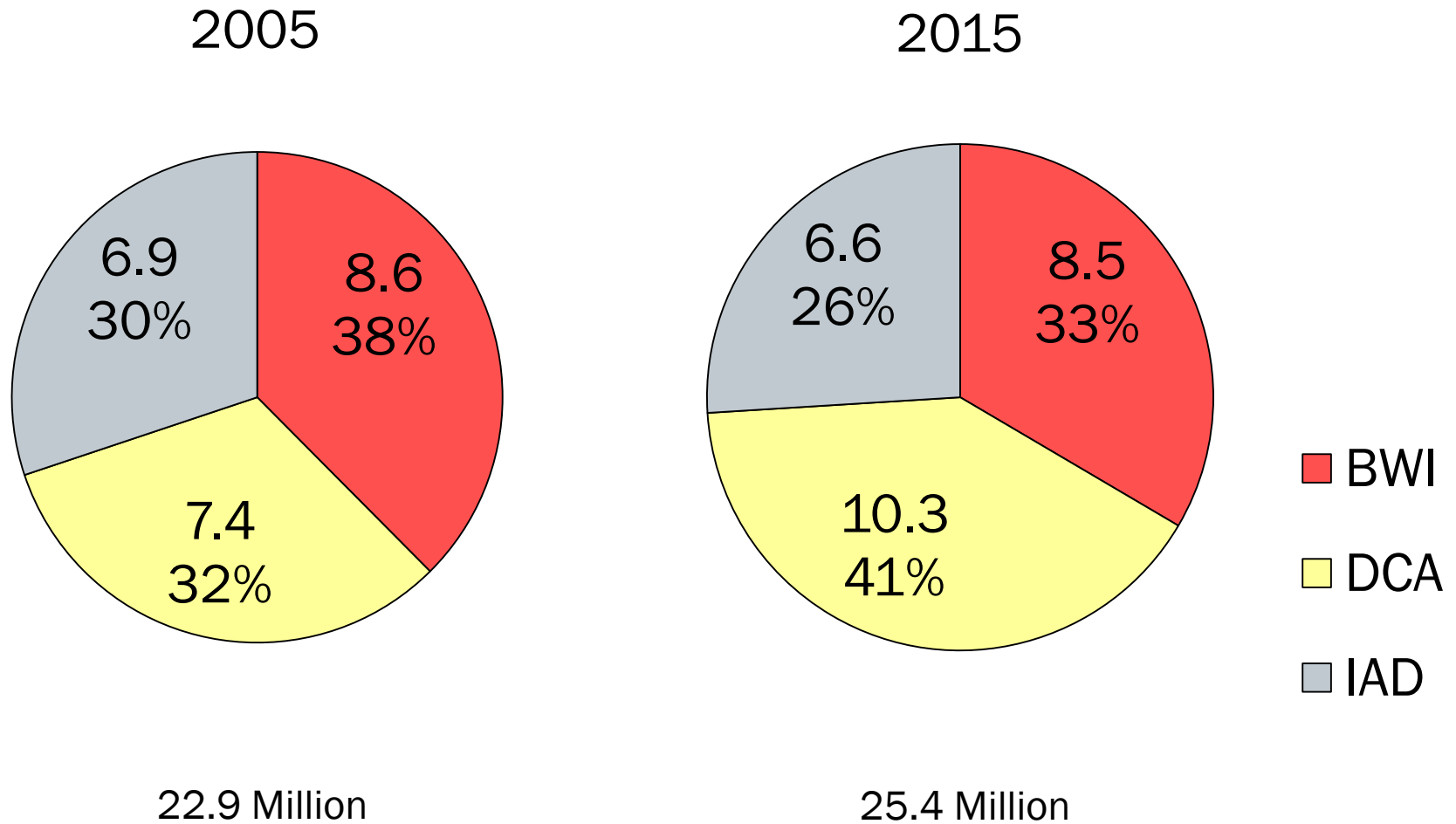


Comparing Locally Originating and Connecting Passengers (2015)

- Locally originating passengers use the regional surface transportation network to access the airport
- Connecting passengers are often flying an airline for which the airport is a hub or focus city

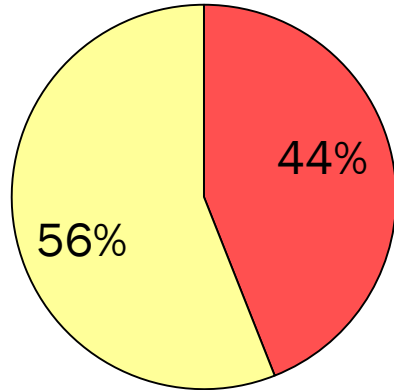


Change in Local Originations by Airport



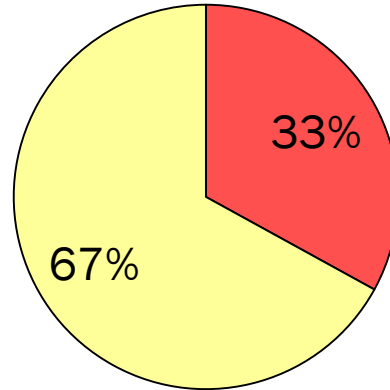
Change in Trip Purpose – All Airports

2011



24.4 Million
Passengers

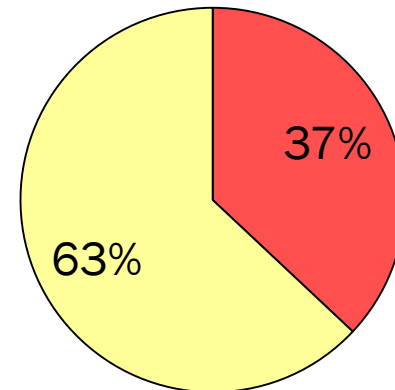
2013



*Federal Sequester
Federal Shutdown*

23.4 Million
Passengers

2015



25.1 Million
Passengers

■ Business
■ Non-Business

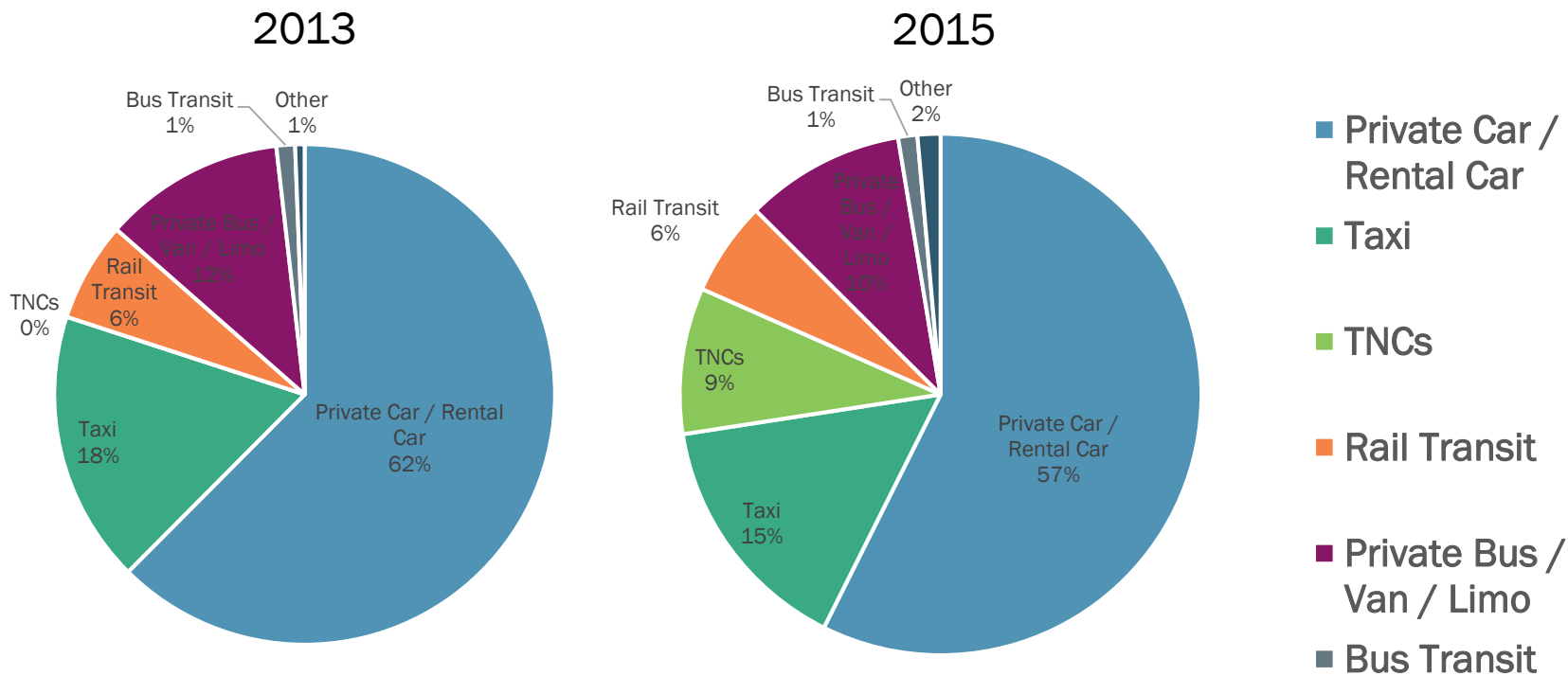


Factors Influencing Airport Choice for Travelers (All Purposes) by Airport (2015)

	BWI	DCA	IAD	All
Closest airport	28%	33%	25%	29%
Better public ground transportation	3%	10%	2%	6%
Better access roads and parking	18%	12%	14%	15%
More convenient flight times	17%	18%	19%	18%
Only airport with direct flight	7%	7%	12%	8%
Less expensive airfare	17%	12%	14%	14%
Frequent flyer with specific airline	5%	5%	7%	6%
Only airport serving market	7%	2%	5%	3%
Other	3%	2%	1%	2%



Airport Mode of Access – All Airports



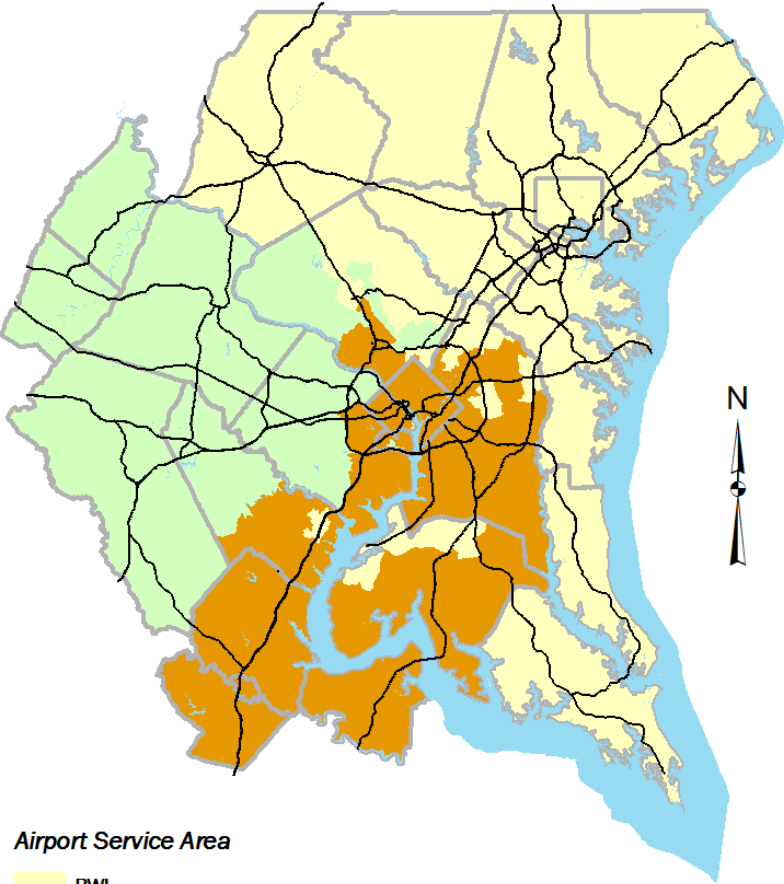
Metrorail Share at DCA
15%

Metrorail Share at DCA
12%

DCA's transit usage is among the highest in the country for airports, but has decreased between 2013 and 2015



2015 Airport Service Areas by Aviation Analysis Zone

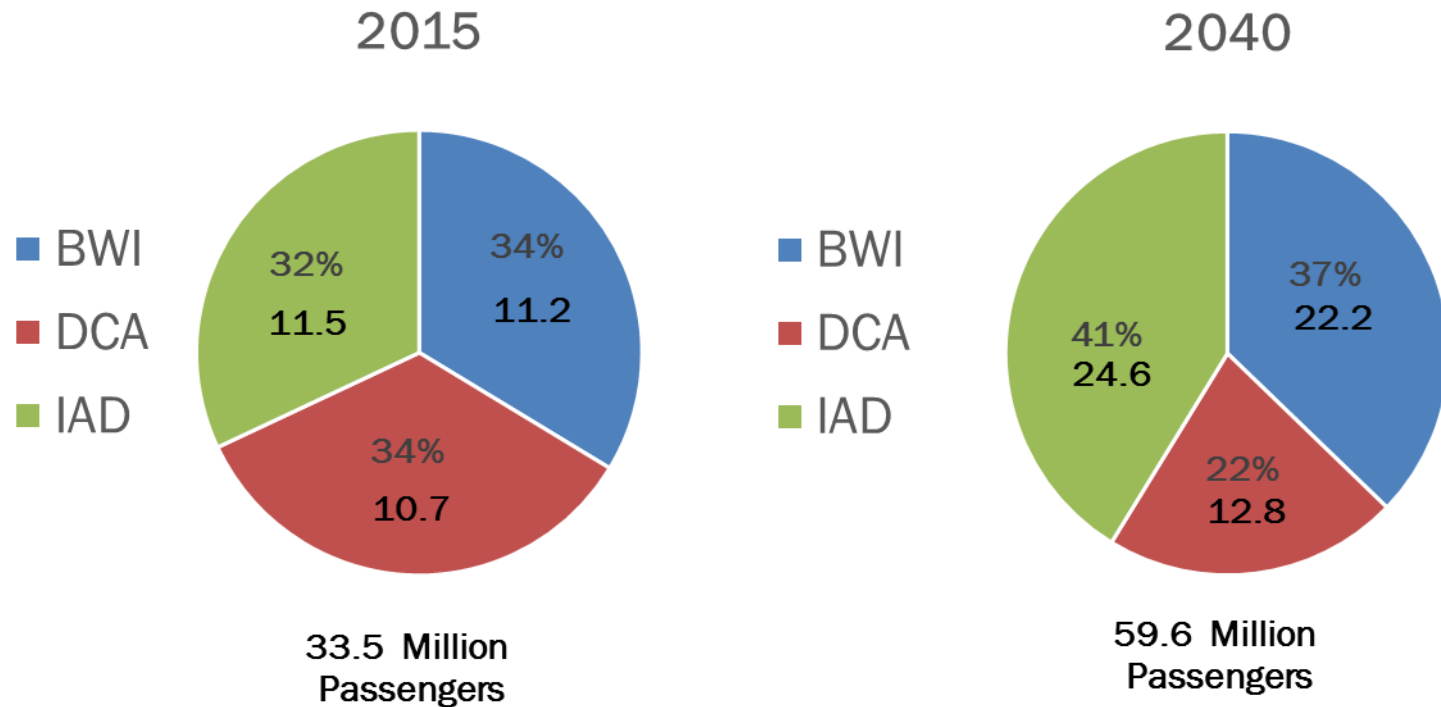


Airport Service Area

- BWI
- DCA
- IAD



FAA Forecast in Regional Air Passengers



Source: FAA Terminal Area Forecasts (2014)



Next Steps

- Receive comments on draft report from Aviation Technical Subcommittee
- Finalize report and survey data file
- Presentation of survey findings to TPB on December 14
- Begin preparations for 2017 Washington-Baltimore Regional Air Passenger Survey

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