

ITEM 13 - Information

December 19, 2012

Briefing on Results from the 2011 Washington-Baltimore Regional Air Passenger Survey

Staff Recommendation: Receive briefing on major findings from the survey, including airport usage, airport mode of access and ground trip origin, air trip purpose, and air traveler characteristics.

Issues: None

Background: In November 2011, an air passenger survey was conducted at the three major airports in the Washington-Baltimore Region: Ronald Reagan Washington National Airport (DCA), Washington Dulles International Airport (IAD) and Baltimore/Washington International Thurgood Marshall Airport (BWI).

National Capital Region Transportation Planning Board

777 North Capitol Street, N.E., Suite 300, Washington, D.C. 20002-4290
(202) 962-3310 Fax: (202) 962-3202 TDD: (202) 962-3213

MEMORANDUM

TO: Transportation Planning Board

FROM: Richard I. Roisman, AICP
Continuous Airport System Planning Program Manager

DATE: December 10, 2012

RE: Results from the 2011 Washington-Baltimore Regional Air Passenger Survey

At its December 19, 2012 meeting, the Board will receive a briefing on the major findings from the 2011 Washington-Baltimore Regional Air Passenger Survey. For the Continuous Airport System Planning (CASP) program, which is funded by the Federal Aviation Administration (FAA), the airport system planning process consists of a continuous cycle that begins with the Washington-Baltimore Regional Air Passenger Survey. The survey has been performed periodically since 1981 and since 2005 has been performed every two (2) years. The 2011 survey is the tenth of the series. The results from the survey are used to develop forecasts of future air passenger travel and the ground travel of these air passengers to and from the region's three commercial airports. These forecasts are then integrated with the regional travel demand forecasting model, and in turn lead to the development of a revised airport ground access plan for the region. The revised airport ground access plan is then considered in the next update of the TPB's regional Constrained Long Range Plan.

The survey is conducted at the three regional commercial service airports: Ronald Reagan Washington National Airport (DCA), Washington Dulles International Airport (IAD), and Baltimore-Washington International Thurgood Marshall Airport (BWI). The administration of the survey and a portion of the follow-up processing and analysis are funded directly by the airport operators: two-thirds by the Metropolitan Washington Airports Authority (MWAA) for DCA and IAD, and one-third by the Maryland Aviation Administration (MAA, part of the Maryland Department of Transportation) for BWI. The remainder of the analysis is funded under the annual FAA grant that supports the other aspects of the CASP program.

The survey itself is an at-gate survey of departing passengers on a random sample of domestic and international flights during a two-week period in late October or early November of the survey year (in this case, 2011). All passengers age 16 and older are asked if they would be willing to complete the survey. While passenger participation in the survey is voluntary, staff works closely with MWAA and MAA to inform the airlines at each facility of the survey and its purpose for every survey year to maximize response rates. For the 2011 survey, which was conducted from November 2nd to November 15th, the sample consisted of 684 flights (605

domestic and 79 international) representing 59,300 enplanements (boardings). Approximately 23,500 passengers participated in the survey, a response rate of 39 percent. The survey results are annualized to observed annual passengers for calendar year 2011.

The survey itself consists of a written questionnaire that is distributed to departing passengers (who volunteer to participate) waiting in the gate area. The questionnaire, which only takes a few minutes to complete, contains questions about how the passenger traveled to the airport, from where and what time they began their trip to the airport, the purpose of their air travel, why they chose a particular airport, and basic demographic information such as location of residence, household size, age, and household income. Additional survey questions cover visitors to the area and use of ticketing and baggage services.

The survey results indicate that regional air passenger enplanements have increased slightly since the last survey was conducted in 2009. Enplanements are split roughly one-third each at each of the three regional airports, with a slightly smaller proportion at DCA. Most of the enplanements are passengers beginning their trip at one of the three airports rather than connecting from another flight; these passengers access the airport using the regional ground transportation network. Most of the locally originating passengers begin their trip to the airport at home, and most of them use a private car or rental car to get to the airport. Some of these characteristics vary between the three regional airports, and the presentation on the 28th will discuss some of these important differences.

Two other key findings from the 2011 air passenger survey are that 1) business travel (both government-related and non-government related) has increased significantly from 2009 at all three airports and 2) airport accessibility (defined in the survey as the closest airport) continues to be the primary factor in airport choice for both business and non-business air travelers. By 2040, air passenger travel at the three regional airports is forecast to more than double; as air travel increases, maintaining fast and reliable ground access to the airports will be extremely important to regional growth and prosperity.

The three commercial airports have a significant economic impact to the region, and the TPB has emphasized the importance of airports to the regional transportation system by including continued airport access as a goal in the TPB Vision. In addition, airport-related measures have been included in the Regional Transportation Priorities Plan.