

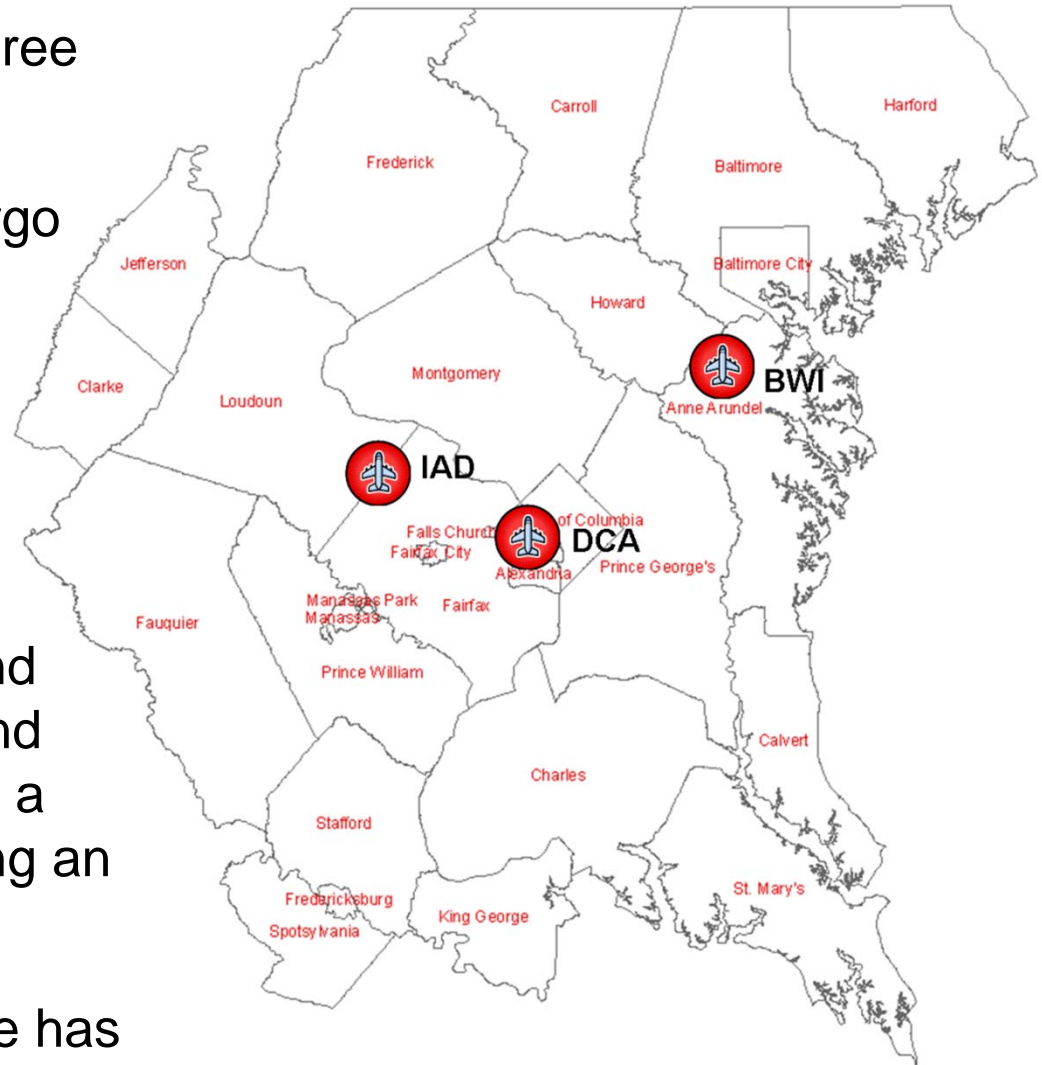
Findings from the 2013 Washington-Baltimore Regional Air Passenger Survey

TPB Technical Committee
October 3, 2014

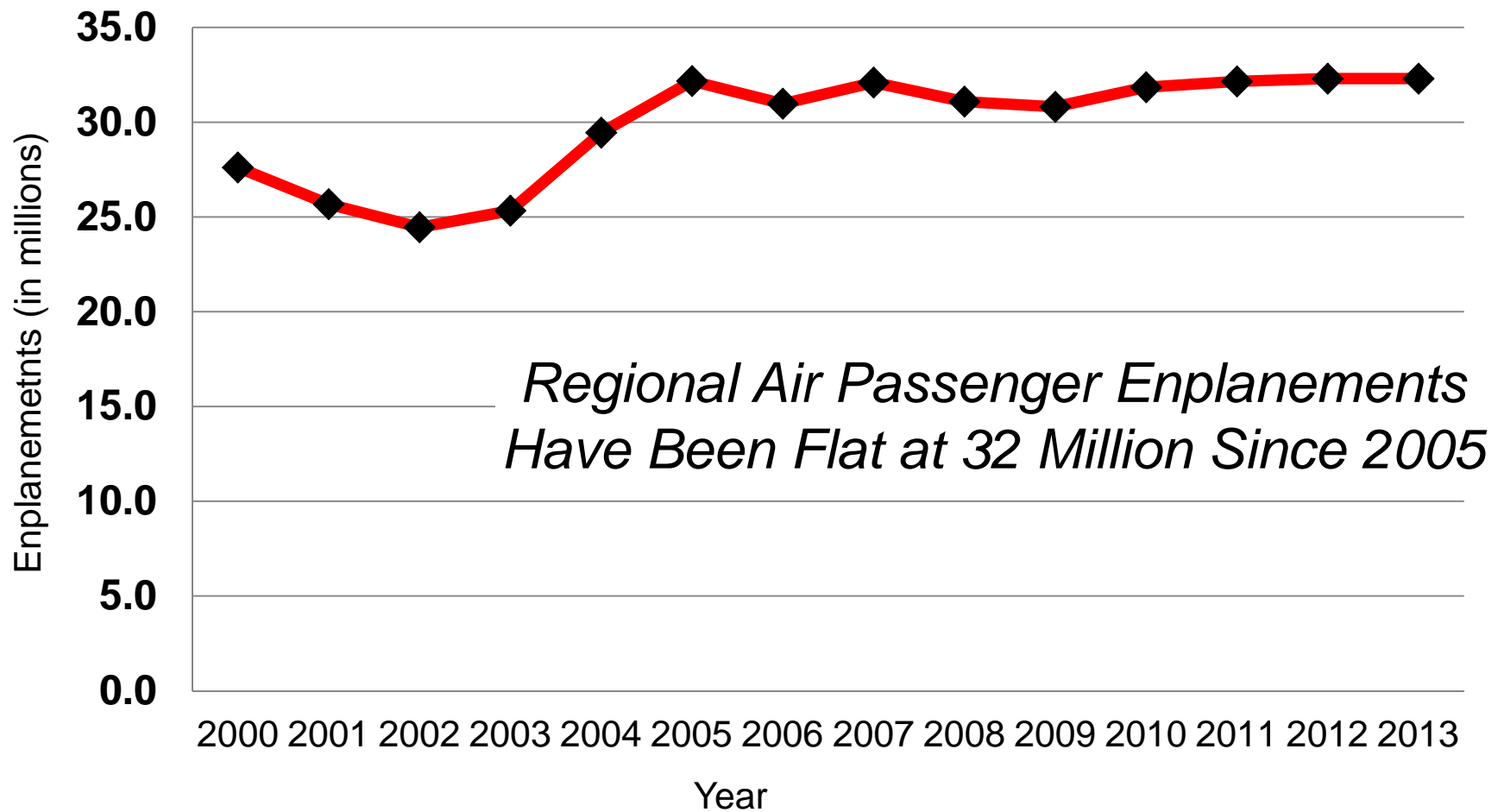
Richard I. Roisman, AICP
Senior Transportation Planner
Air Systems Program Manager

Having Three Commercial Airports is a Key Regional Asset

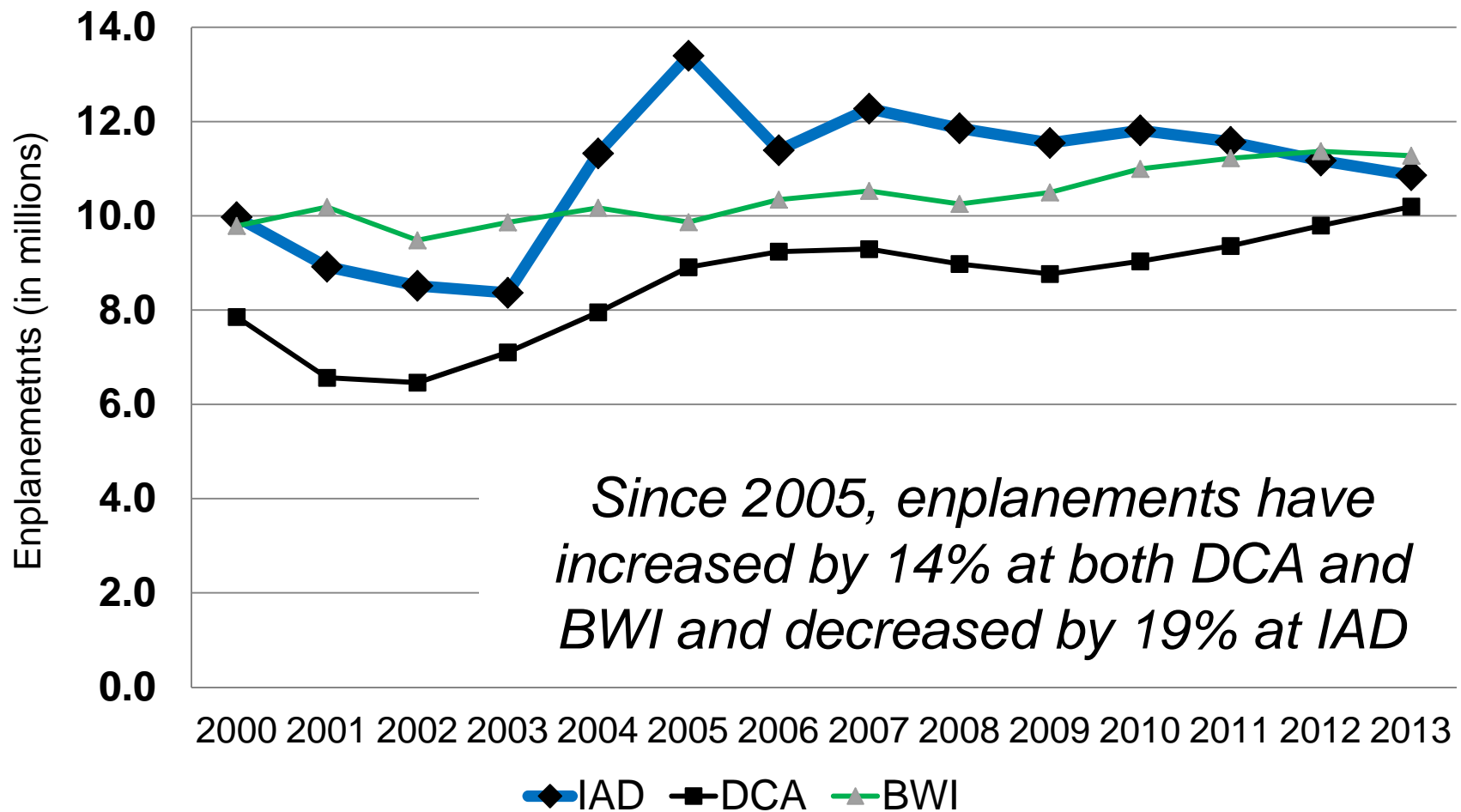
- ▶ Historically, three airports with three distinct markets
- ▶ Serve air passengers and air cargo
- ▶ Multimodal ground access
- ▶ COG (with MWAA and MAA) conducts regional air passenger surveys every two years
- ▶ COG also prepares airport ground access forecasts, monitors ground access travel time, and prepares a regional air system plan (including an air cargo element)
- ▶ Aviation Technical Subcommittee has oversight of the CASP Work Program



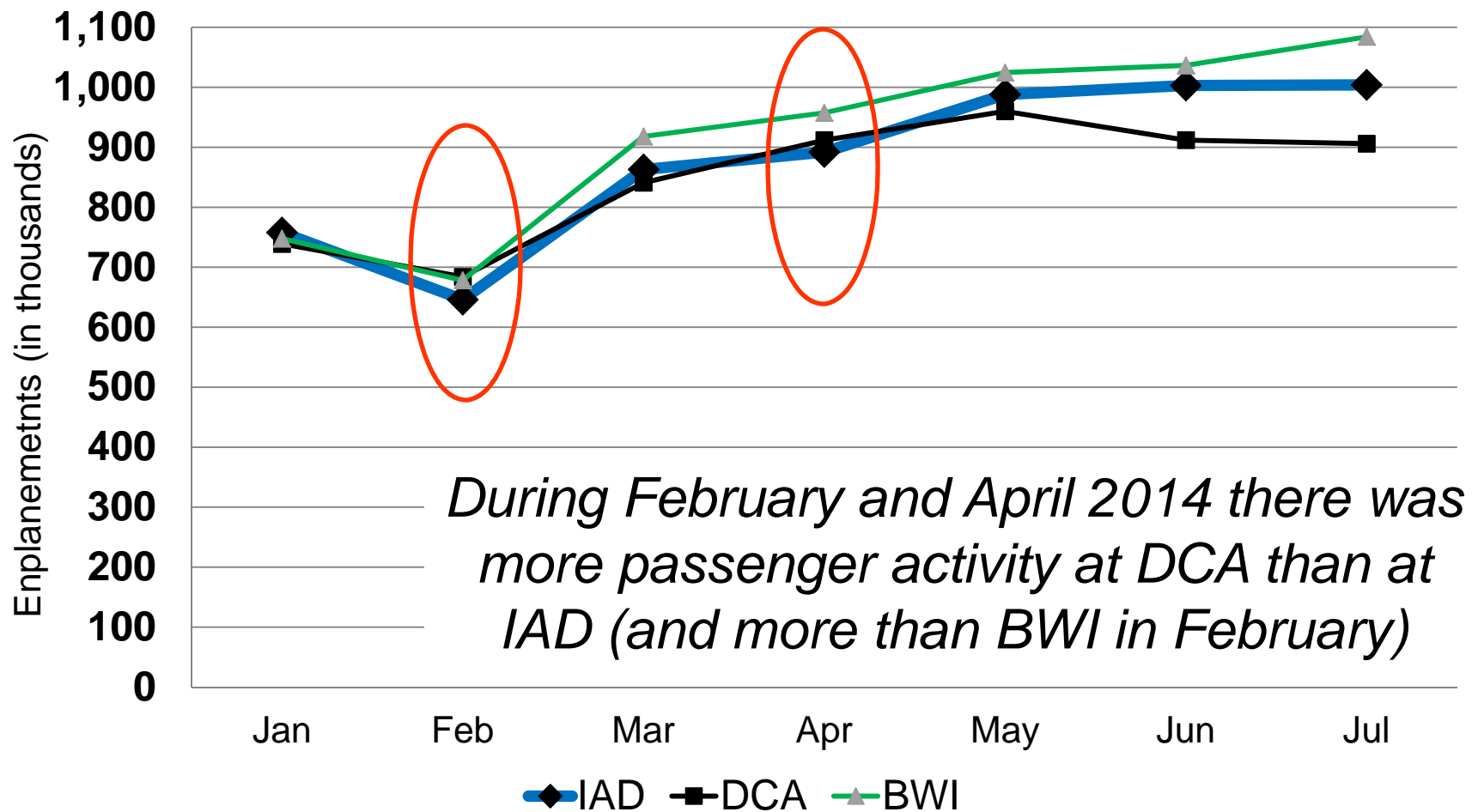
Regional Air Passenger Enplanements Trend (2000 – 2013)



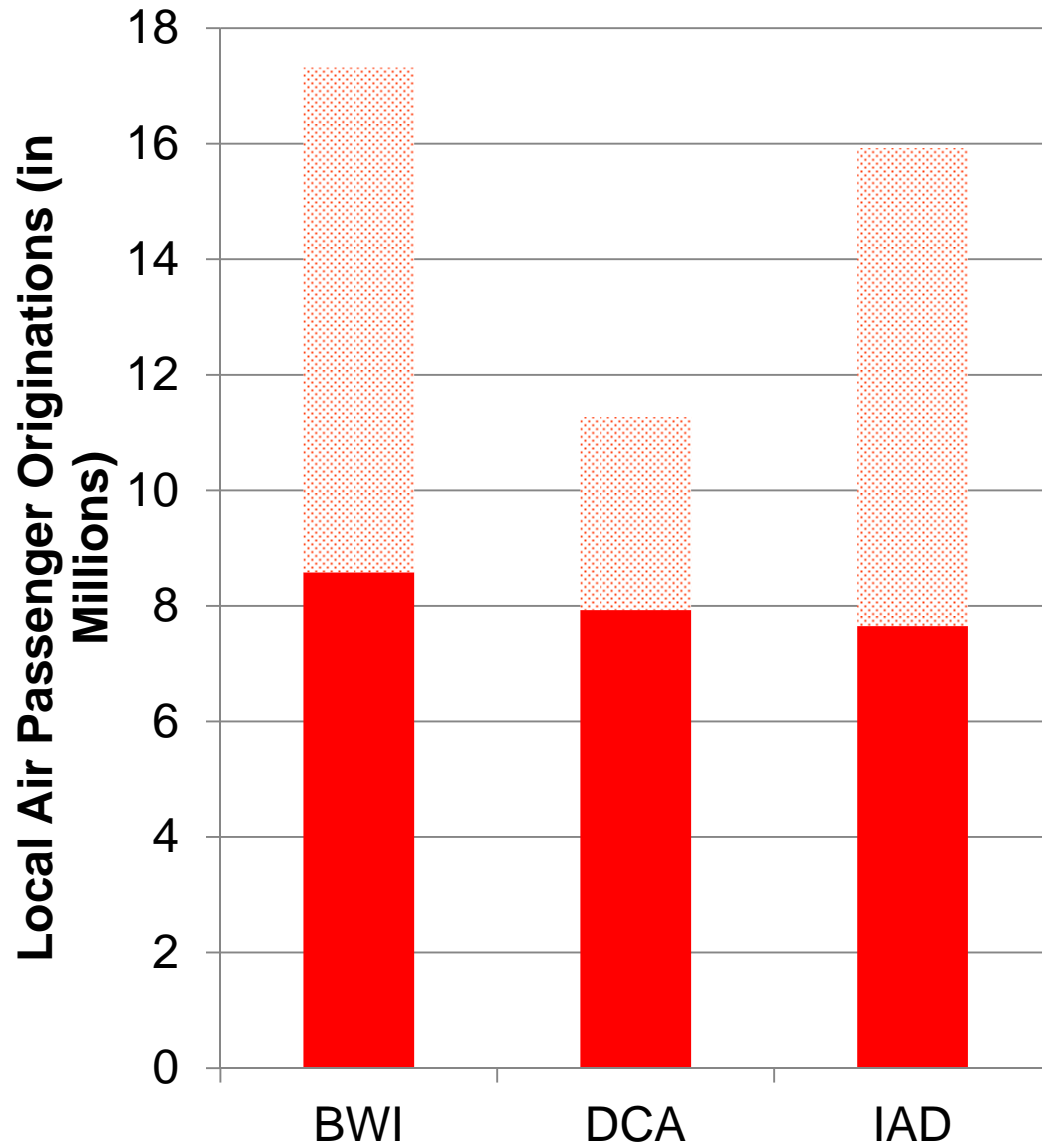
Regional Air Passenger Enplanements Trend (2000 – 2013) by Airport



Regional Air Passenger Enplanements Trend (2014 YTD) by Airport



Historic and Forecast Growth in Local Air Passenger Originations*



Percent Change

Airport	1980-2010	2010-2040
BWI	399%	102%
DCA	26%	42%
IAD	507%	108%

■ FAA Forecast Growth 2010-2040
■ 2010

*Excludes connecting passengers and ground access trips originating outside the air systems region

Source: FAA TAF (2013)
COG/TPB Ground Access
Forecast Update

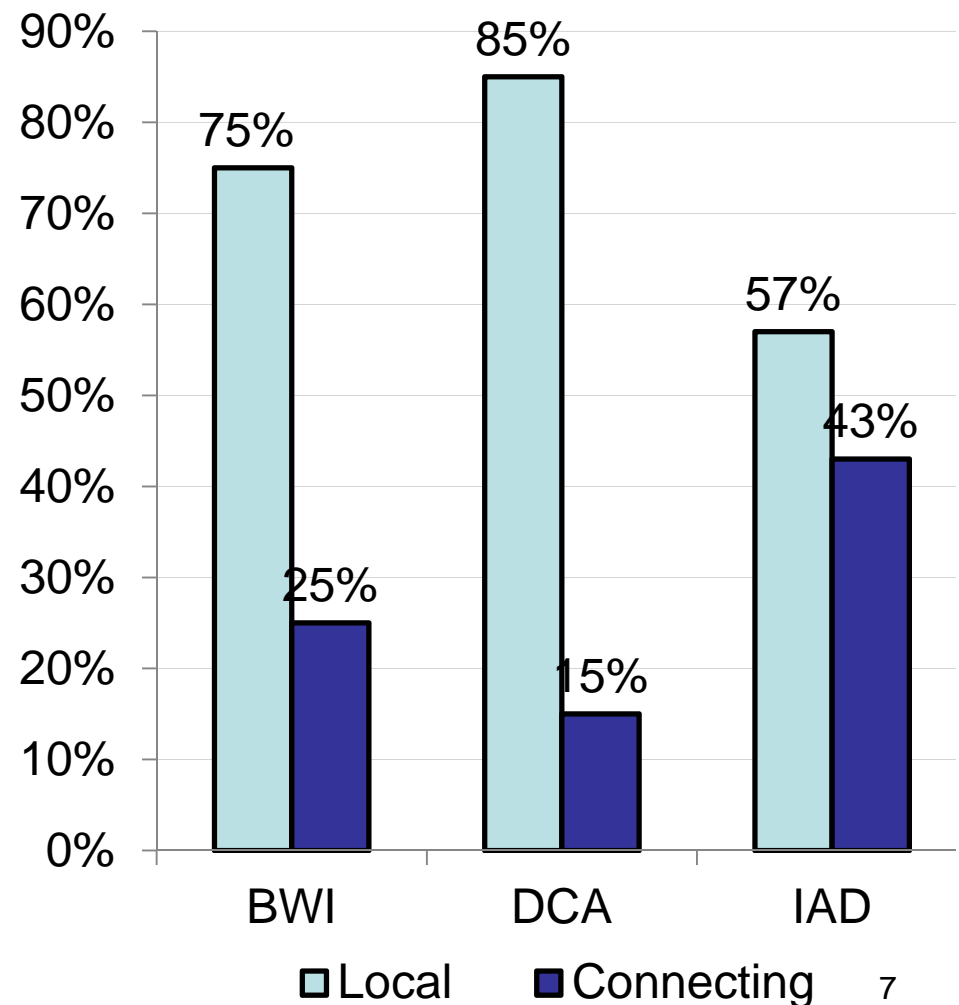
Air Passenger Survey Background

- ▶ A random sample of approximately 673 flights (592 domestic and 81 international)
- ▶ Survey started on Wednesday, October 9th and ended on Tuesday, October 22nd 2013

Airport	Flights Surveyed	Revenue Passenger Count	Completed Surveys	Response Rate
BWI	225	25,101	8,790	35%
DCA	221	17,639	6,639	38%
IAD	227	26,320	9,313	35%
Total	673	69,060	24,742	36%

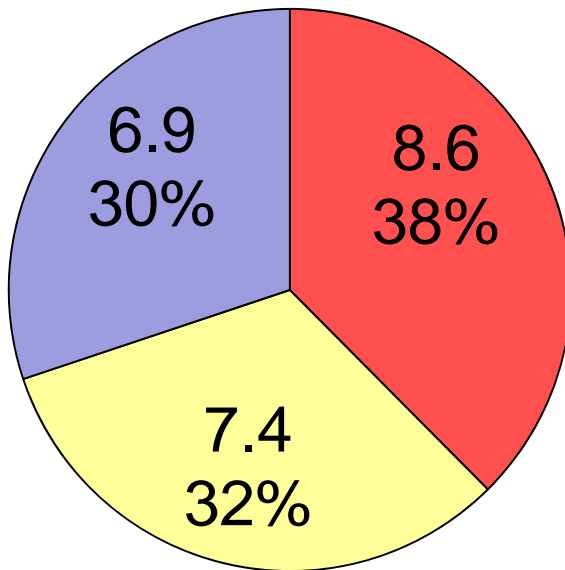
Locally Originating vs. Connecting Passengers (2013)

- ▶ 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



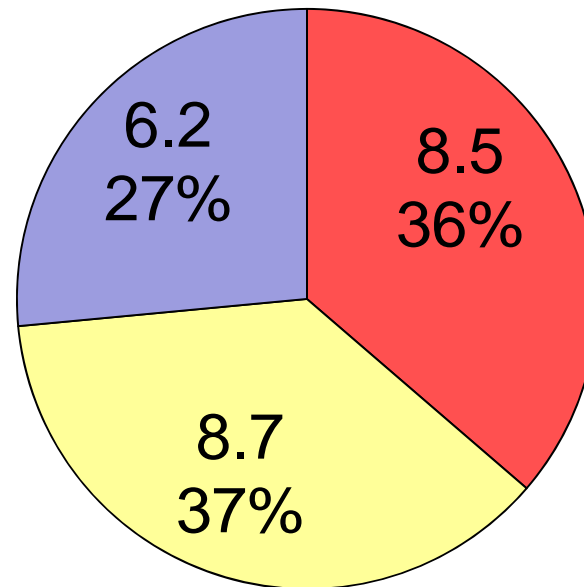
Change in Locally Originating Passengers by Airport

2005

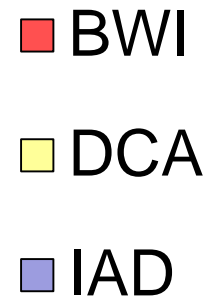


22.9 Million

2013

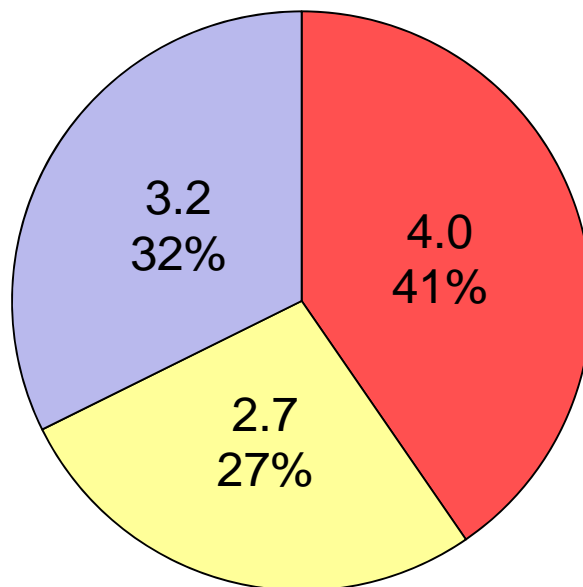


23.4 Million



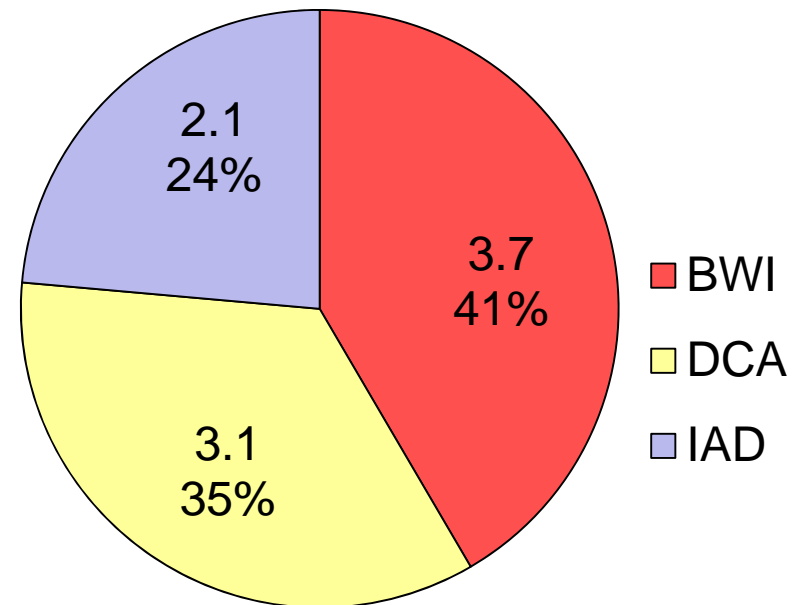
Locally Originating Air Passengers Who Reside in the Washington- Baltimore Region, by Airport

2005



9.9 Million
Enplanements
(50% of total)

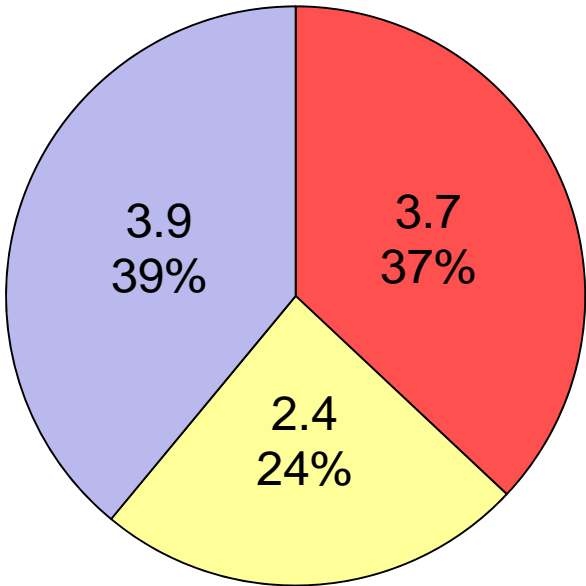
2013



8.9 Million
Enplanements
(42% of total)

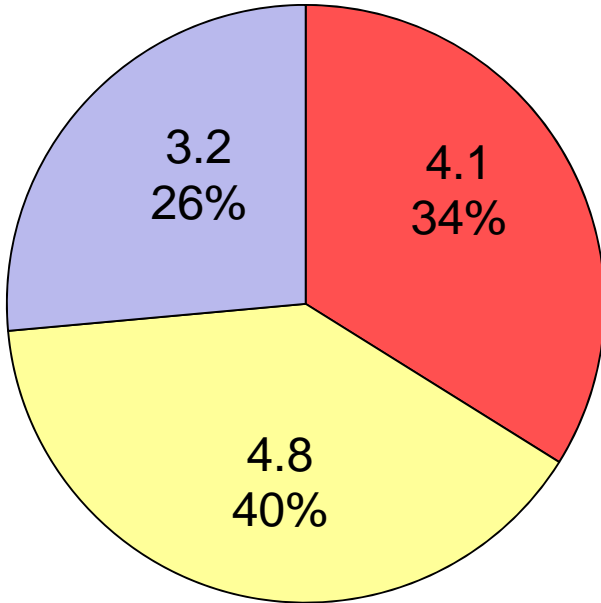
Locally Originating Air Passengers Who Do Not Reside in the Washington-Baltimore Region, by Airport

2005



10.0 Million
Enplanements
(50% of total)

2013

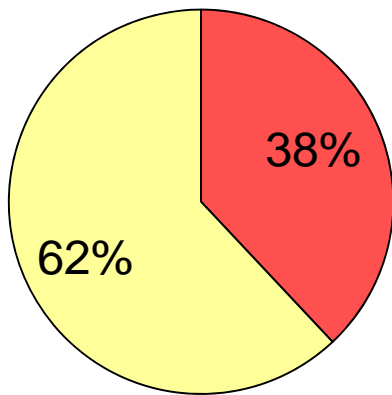


12.1 Million
Enplanements
(58% of total)

- BWI
- DCA
- IAD

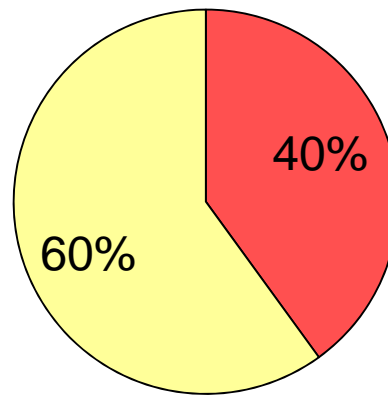
Trip Purpose for Air Passengers Who Reside in the Washington- Baltimore Region

2005



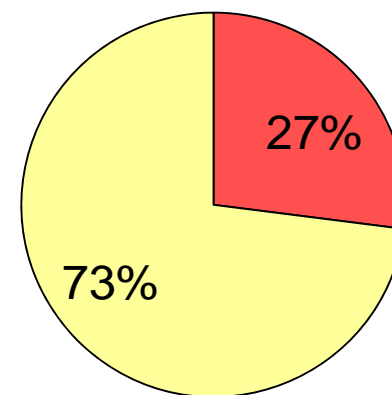
8.2 Million
Passengers

2011



10.1 Million
Passengers

2013



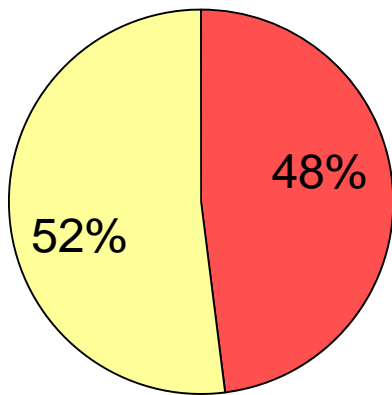
8.6 Million
Passengers

*Federal Sequester
Federal Shutdown*

■ Business
■ Non-Business

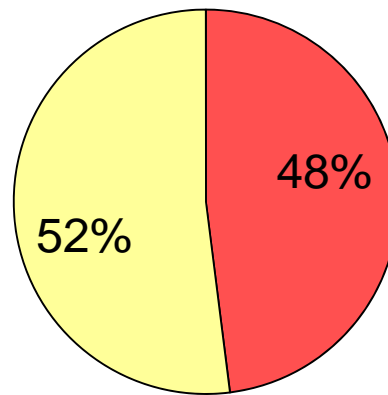
Trip Purpose for Air Passengers Who Do Not Reside in the Washington-Baltimore Region

2005



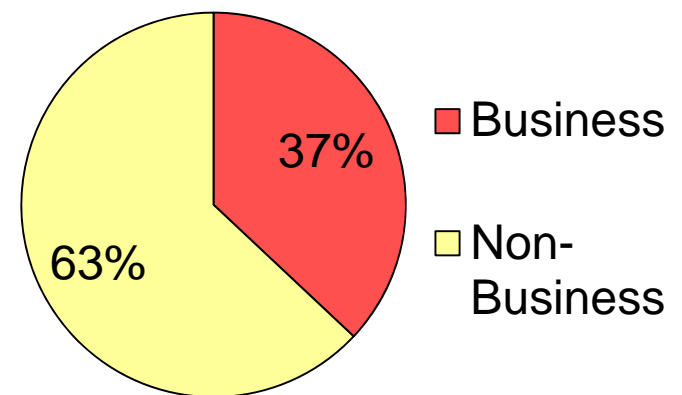
11.1 Million
Passengers

2011



11.5 Million
Passengers

2013



12.0 Million
Passengers

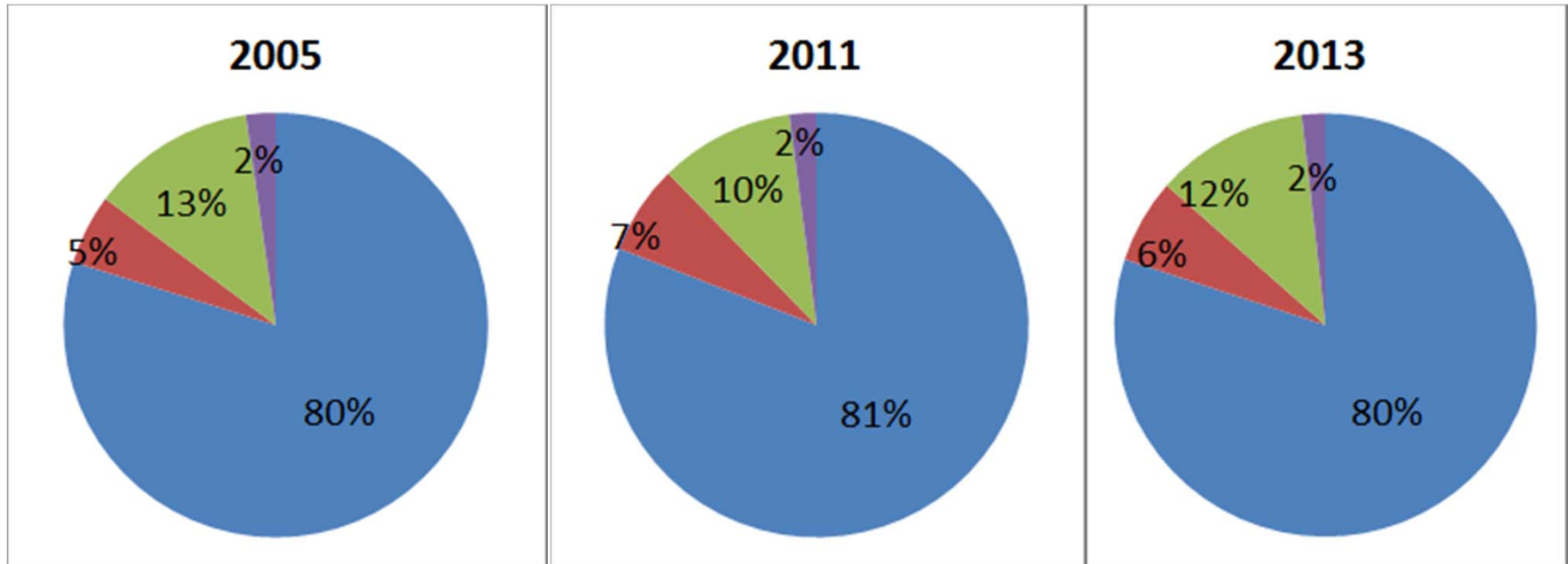
Factors Influencing Airport Choice for Business Travelers – by Airport (2013)

	BWI	DCA	IAD	All
Closest airport	58%	70%	45%	59%
Better public ground transportation	1%	4%	1%	2%
Better access roads and parking	4%	2%	5%	3%
More convenient flight times	8%	8%	13%	9%
Only airport with direct flight	5%	4%	14%	7%
Less expensive airfare	15%	5%	10%	10%
Frequent flyer with specific airline	4%	3%	5%	4%
Only airport serving market	2%	2%	5%	3%
Other	4%	4%	3%	3%

Factors Influencing Airport Choice for Non-Business Travelers – by Airport (2013)

	BWI	DCA	IAD	All
Closest airport	55%	58%	42%	53%
Better public ground transportation	1%	6%	1%	3%
Better access roads and parking	3%	2%	5%	3%
More convenient flight times	6%	8%	12%	8%
Only airport with direct flight	4%	4%	12%	6%
Less expensive airfare	24%	15%	18%	16%
Frequent flyer with specific airline	3%	2%	4%	3%
Only airport serving market	2%	1%	5%	2%
Other	2%	4%	3%	3%

Airport Trip Mode of Access (Regional)



Metrorail Share at DCA
13%

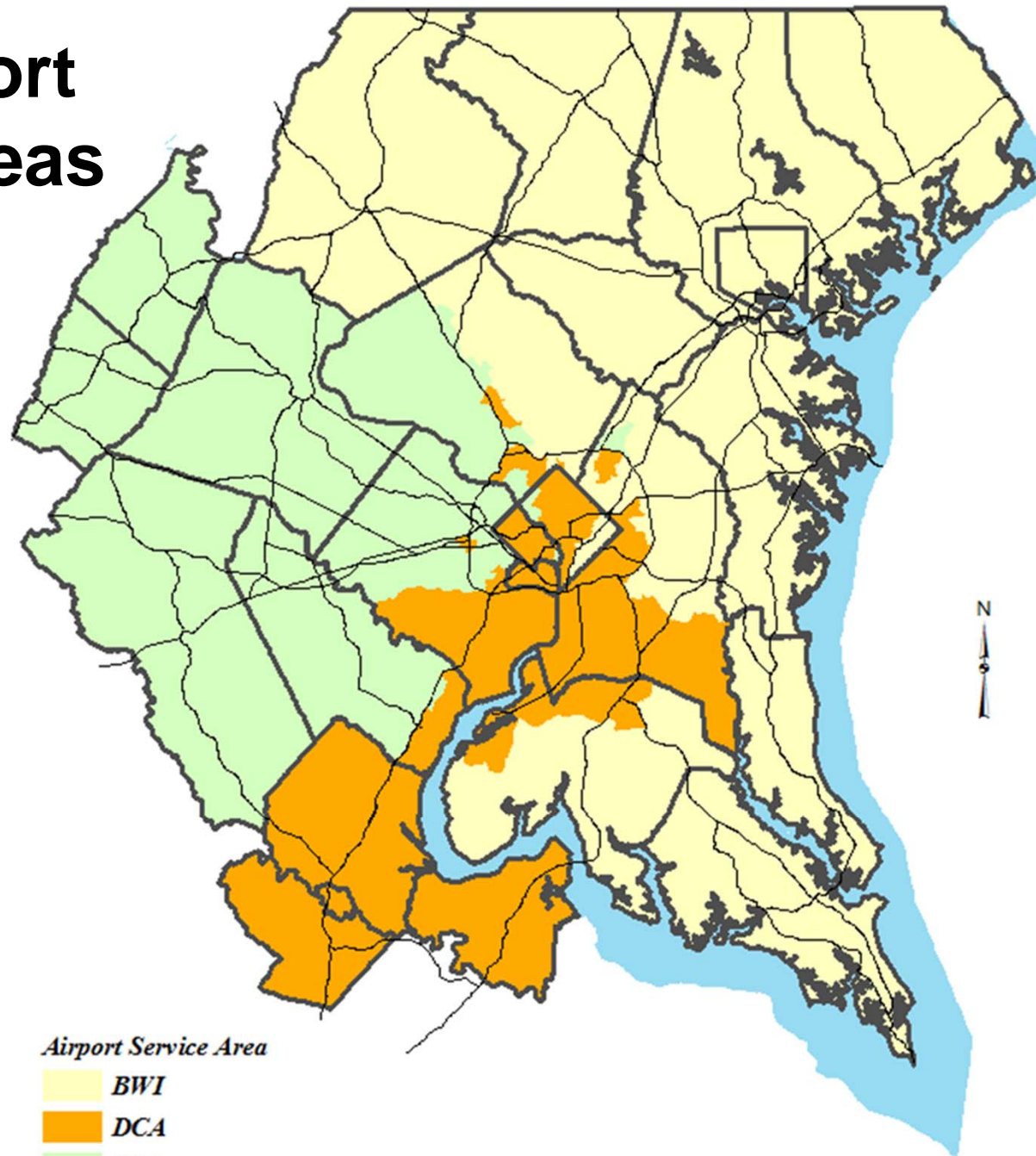
Metrorail Share at DCA
16%

Metrorail Share at DCA
15%


DCA's transit usage is among the highest in the country for airports

- Private Car / Rental Car / Taxi
- Metrorail / Light Rail / Amtrak
- Airport Bus / Van / Limo + Hotel / Motel Bus
- Metrobus / MTA Bus / Other


2011 Airport Service Areas by AAZ




Airport Service Area

 *BWI*

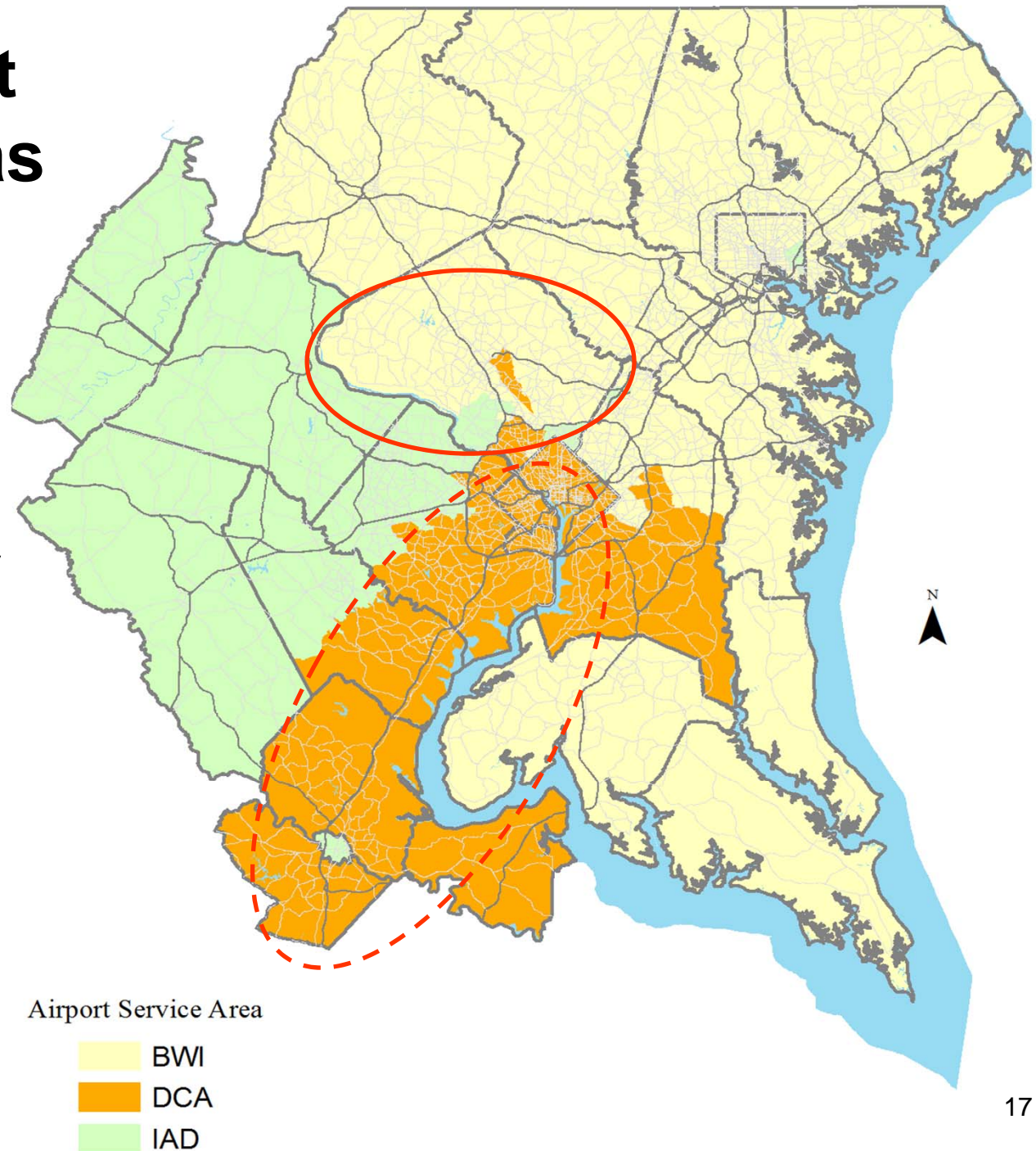
 *DCA*

 *LAD*

 *Jurisdiction*

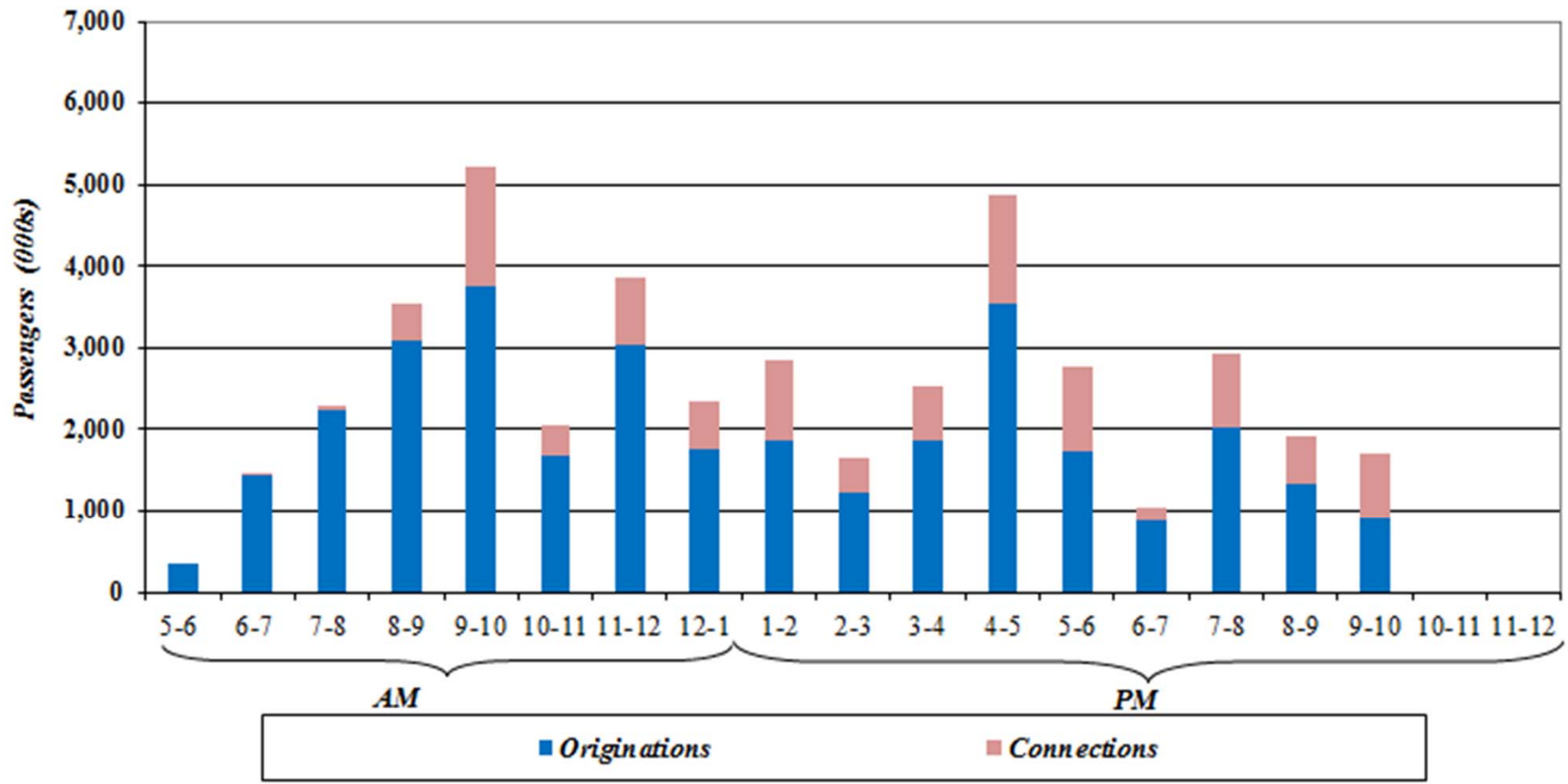
2013 Airport Service Areas by AAZ

- ICC (MD 200) improves access to BWI for Montgomery County west of I-270
- Expansion of DCA service area along I-95 corridor



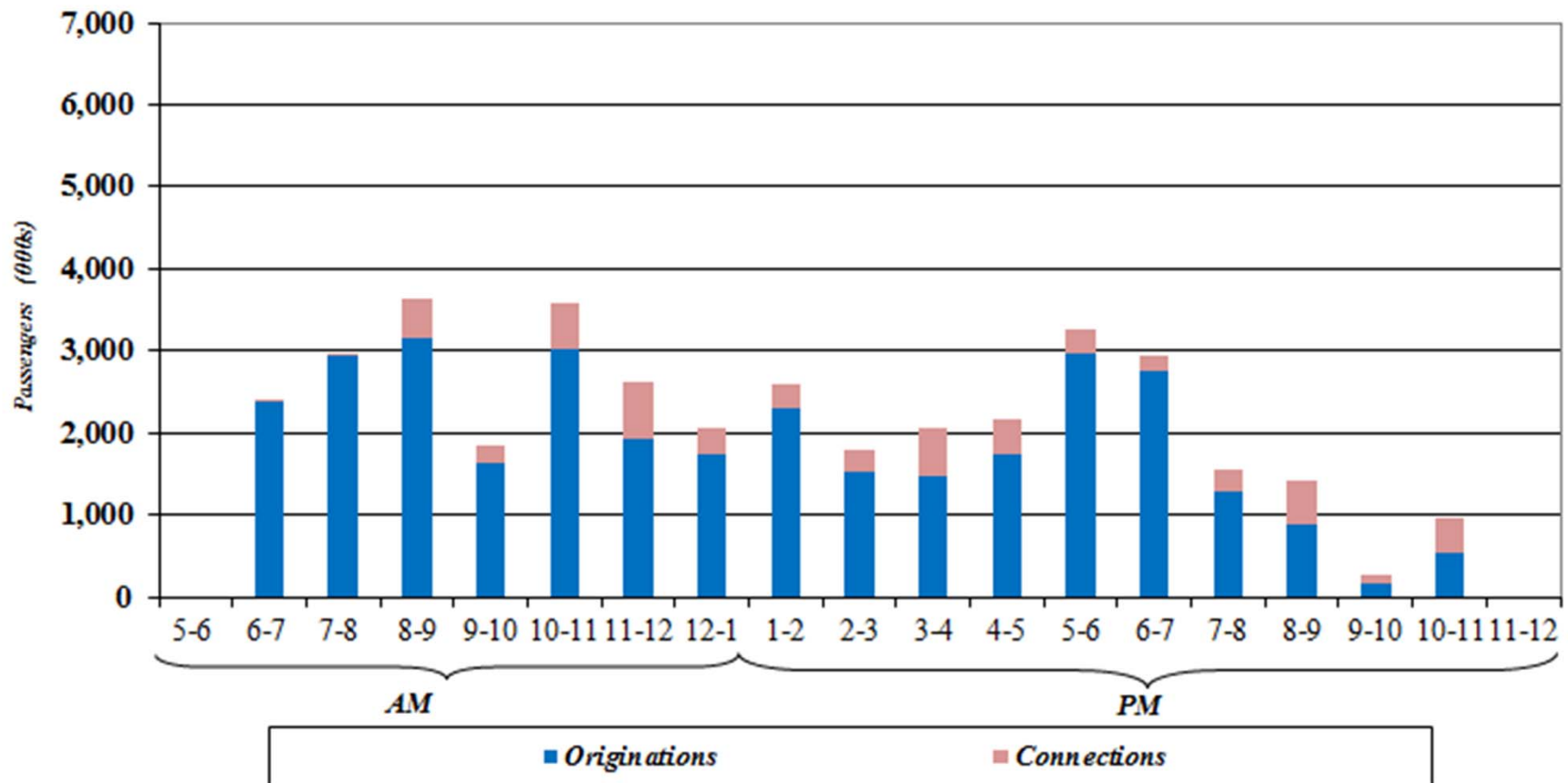
Diurnal Distributions of Air Passenger Activity by Airport

Passenger Activity at BWI is High Through Most of the Day



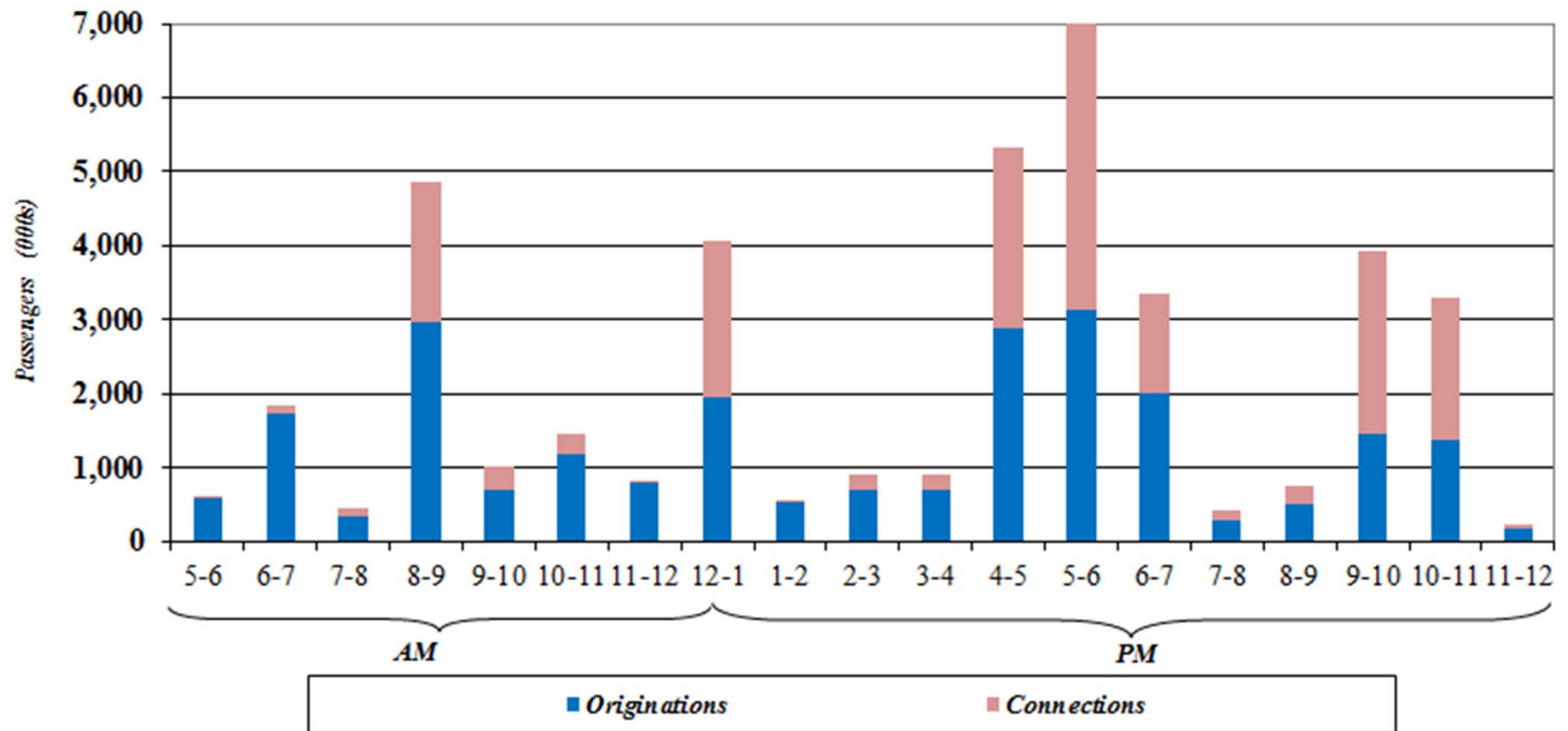
Source: 2013 Washington-Baltimore Regional Air Passenger Survey

Passenger Activity at DCA is Less Peaked Than BWI and IAD



Source: 2013 Washington-Baltimore Regional Air Passenger Survey

Passenger Activity at IAD is Representative of a Long-Haul Airport



Source: 2013 Washington-Baltimore Regional Air Passenger Survey

Our Region's Airports: Challenges and Opportunities

1. Impact of Federal government reductions
2. Capacity limits at DCA
3. New service from Low Cost Carriers into DCA and IAD
4. ICC (MD 200) improves access for BWI
5. Weekend MARC service improves access for BWI
6. Silver Line improves access for IAD
7. IAD Western Access
8. Maintaining balance in regional three airport system

Our Airports' Importance to Our Region's Economy

Economic Impact of BWI

- ▶ \$5.6B in business revenue
- ▶ \$3.6B in personal income
- ▶ \$2.0B in local purchases
- ▶ \$721M in state/local/aviation taxes
- ▶ 93,791 jobs

Economic Impact of DCA+IAD

- ▶ \$19.8B in business revenue
- ▶ \$14.6B labor income
- ▶ \$3.1B in state/local/aviation taxes
- ▶ 371,000 total jobs

Sources: The Regional and Local Economic Impacts of the Baltimore/Washington Thurgood Marshall Airport, July 2011; MWAA 2012 Economic Impact Study, May 2014

Summary

- ▶ Regional air passenger enplanements have been flat since 2005, but traffic has been shifting between BWI, DCA, and IAD
- ▶ Forecasts indicate future regional growth in air passengers
- ▶ Maintaining and improving our airports and ground access connections to our airports is crucial to the region's future economic growth and prosperity
- ▶ The impact of future reductions in the Federal workforce is the biggest challenge to air passenger growth
- ▶ The regional three airport system is out of balance

Next Steps

- ▶ Publish final survey report and survey data files
- ▶ Preparation of Ground Access Forecasts based on 2013 survey data and FAA Terminal Area Forecast data
- ▶ Transmit forecasts to Models Development Team for preparation of airport trip tables model input
- ▶ Presentation on regional airports infrastructure to COG Board on October 8th
- ▶ Presentation of survey findings to TPB on October 15th

**Thank you for your interest
and time**

