National Capital Region
Transportation Planning Board

MEMORANDUM

TO: TPB Technical Committee

FROM: Rich Roisman, TPB Planning Data Program Manager

SUBJECT: Background for Agenda Item 5 -- 2015 Washington-Baltimore Air Passenger Survey Geographic Findings

DATE: November 22, 2016

At its December 2, 2016 meeting, the Technical Committee will receive a briefing on the results of the 2015 Washington-Baltimore Regional Air Passenger Survey. The survey, performed every two years, provides the data foundation for other activities completed under the Continuous Airport System Planning (CASP) Program. Staff has prepared this memorandum for inclusion in the mail-out packet to provide Committee members with background information on the CASP Program and the 2015 Air Passenger Survey.

THE CASP PROGRAM

CASP has been part of the TPB work program since 1978. Funding for the program comes from the Federal Aviation Administration (FAA). These funds are used for air systems planning in the Washington-Baltimore region, which extends beyond the traditional TPB planning area and includes all three commercial service airports in the combined region: Ronald Reagan Washington National Airport (DCA), Washington Dulles International Airport (IAD), and Baltimore-Washington International Thurgood Marshall Airport (BWI [see shaded area of Figure 1, attached]).

The CASP Program provides a process that supports the planning, development and operation of airport facilities and the ground transportation facilities that serve the region's commercial airports in a systematic framework. This program is developed, implemented and monitored with the assistance of the Aviation Technical Subcommittee. The Subcommittee is composed of representatives from the District of Columbia Department of Transportation, the Metropolitan Washington Airports Authority (the owner and operator of both DCA and IAD), the Maryland Aviation Administration of the Maryland Department of Transportation (MAA, the owner and operator of BWI), as well as a representative from FAA and the Virginia Department of Aviation. While the primary focus of the CASP program is on our three commercial regional airports, smaller airports are represented on the Subcommittee by staff from the City of Frederick and City of Manassas, both of which operate general aviation airports in their respective cities. In addition to program oversight, the subcommittee is responsible for the integration of airport system planning with the regional transportation planning process.

The CASP airport system planning process consists of a continuous cycle that begins with a regional air passenger survey. The survey has been performed periodically since 1981 and since 2005 has been performed every two (2) years. The 2015 survey is the twelfth in the series. The results from the survey are then used with data from the FAA 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 issues identified in the revised airport ground access plan are then integrated into the next update of the TPB's regional Constrained Long Range Plan.

In addition to the continuous planning cycle described above, periodically the CASP program also includes a regional analysis of air cargo and a study of highway travel times from regional activity centers to the three commercial airports. Both of these documents were updated this year. In the current CASP cycle, in addition to beginning preparations for the 2017 Air Passenger Survey, a comprehensive update to the regional air system plan (RASP) will also take place. A full RASP update has not occurred for nearly four decades, and while resource constraints dictate that the update will be broken into three phases, the first phase is beginning now in order to coincide with next year's quadrennial update of the regional (surface transportation) long range plan, both the constrained and unconstrained element.

THE WASHINGTON-BALTIMORE REGIONAL AIR PASSENGER SURVEY

The Regional Air Passenger Survey is conducted simultaneously 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 directly funded by the airport operators: two-thirds by MWAA and one-third by BWI. The remainder of the survey analysis is funded under the annual FAA grant that supports the other aspects of the CASP program.

The survey is an at-gate survey of departing passengers on a random sample of domestic and international flights and is typically conducted during a two-week period in mid-to-late October. All passengers age 16 and older are asked to complete a survey questionnaire. For the 2015 survey, which was conducted from October 7 through October 20, the sample consisted of 683 flights (628 domestic and 55 international) representing approximately 79,000 enplanements (boardings). Approximately 25,000 air passengers participated in the survey, a response rate of 32 percent. The survey results are annualized to observed annual passengers for calendar year 2015.

The survey questionnaire, which only takes a few minutes to complete, contains questions about how the passenger traveled to the airport (means of transportation), 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. In 2013 an on-line survey option was introduced for the first time along with the long-standing option of mailing back a completed survey in a pre-paid envelope, and these options were both continued in the 2015 survey. Finally, for the 2015 survey, transportation network companies (TNCs, e.g., Uber and Lyft) were added as a response option for means of transportation.

The 2015 survey results show annual regional air passenger enplanements (all three airports, combined) have increased from 32.3 million when the last survey was conducted in 2013 to 34.1 million in 2015. The distribution of those enplanements has shifted since 2013, with DCA now seeing a greater proportion of regional enplanements (34%) and IAD seeing a lesser proportion of regional enplanements (31%). BWI continues to see the highest proportion of regional enplanements (35%) and continues to experience has record-high passenger volumes, but their proportion of regional

enplanements has been basically flat between 2013 and 2015. Most of the enplanements (75% regionally) are passengers beginning their trip at one of the three airports rather than connecting from another flight; these passengers, which are called local originations, access the airport using the regional ground transportation network and thus are the focus of the survey analysis. Most of these 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 travel characteristics vary between the three regional airports, and the presentation on December 2 will discuss some of these important differences.

Figure 1: Washington-Baltimore Air Systems Planning Region