

A photograph of an airplane on a tarmac, viewed through a window. The airplane is the central focus, with its tail and wings visible. The tarmac is paved and has some ground service equipment nearby. The sky is clear and blue. The window through which the photo is taken has a dark frame.

Transportation and Air Traveler Characteristics Findings from the 2011 Washington-Baltimore Regional Air Passenger Survey

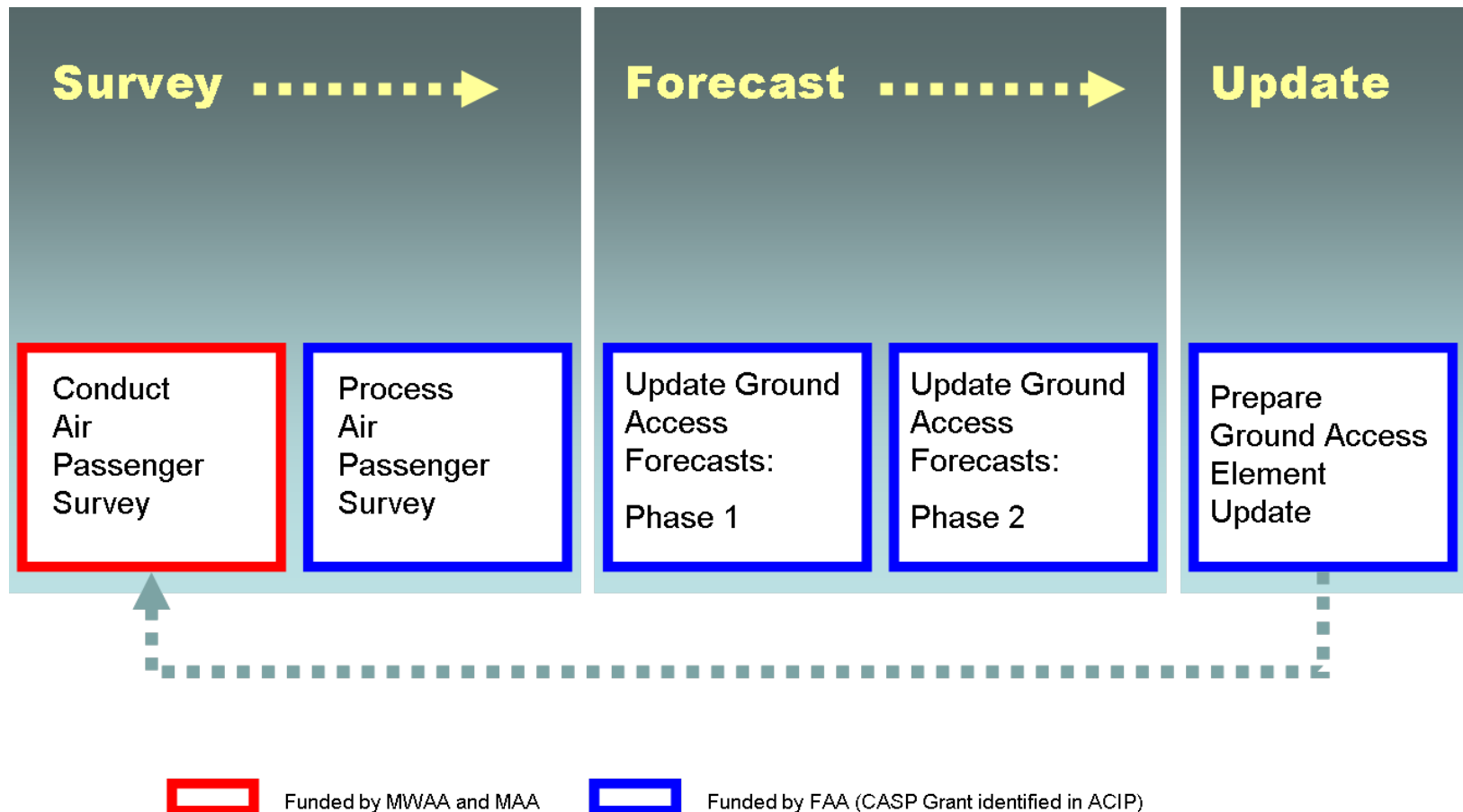
Travel Forecasting Subcommittee
September 21, 2012

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COG/TPB staff

Presentation Overview

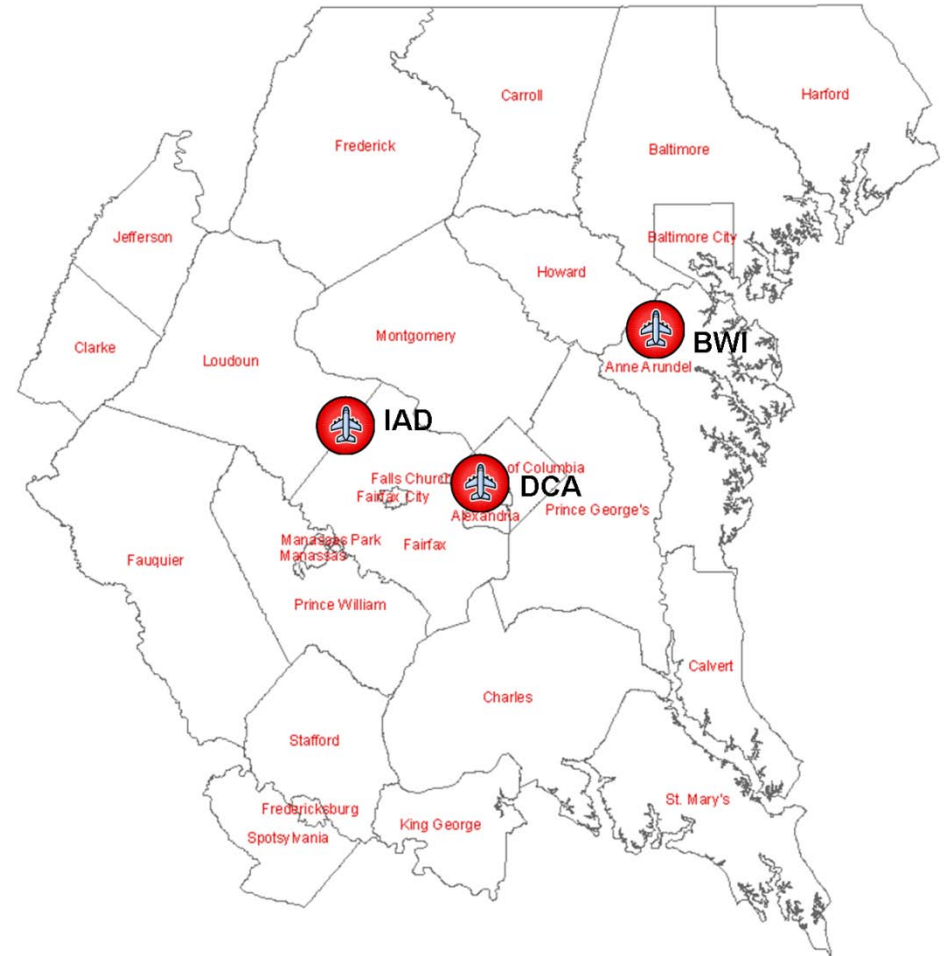
- ▶ Survey Overview and Methodology
- ▶ Transportation Findings
- ▶ Air Traveler Characteristics Findings
- ▶ Conclusions...so far
- ▶ Next steps

The CASP Process occurs in three (3) distinct phases, each containing specific projects and milestones.



Airport System Planning Region includes jurisdictions in Washington region travel demand model, PLUS remainder of the Baltimore Region.

- ▶ Extends north to south from MD/PA border to mid-way between District of Columbia and Richmond, VA
- ▶ Extends east to west from Chesapeake Bay in MD to front range of Appalachians
- ▶ Three major airports: BWI, DCA, and IAD
- ▶ Region includes areas from DC, MD, VA, and WV



Survey Overview and Methodology (1)

- ▶ Survey purpose: provide observed data foundation for CASP program activities and the work of our airport partners (MAA, MWAA)
 - Air passenger demand forecasting
 - Planning for airport access facilities
 - Planning airport landside facilities
 - Trend and market analyses
- ▶ Conducted every two years at the three regional commercial service airports: BWI, DCA, IAD

Survey Overview and Methodology (2)

- ▶ Sample randomly selected from all scheduled departures during two-week survey period, taken from Official Airline Guide
- ▶ Stratification for 2011 survey: by airport, airline, first stop destination
- ▶ Final sample and strata approved by MWAA and MAA
- ▶ Passengers surveyed at airport departure gates while waiting to board flights

Survey Overview and Methodology (3)

Sample Strata

- ▶ BWI – 95 Strata 229 Flight Sample
 - ▶ 216 Domestic and 13 International

 - ▶ DCA – 97 Strata 212 Flight Sample
 - ▶ 204 Domestic and 8 International

 - ▶ IAD – 143 Strata 243 Flight Sample
 - ▶ 185 Domestic and 58 International
-
- 35 Airlines
 - 20 International
 - 18 Domestic
 - 684 Destinations
 - 80 International
 - 604 Domestic

Survey Overview and Methodology (4)

- ▶ 2011 survey conducted for two-week period Wednesday November 2nd through November 15th
- ▶ Resurvey period (flights with insufficient response) November 16th to November 22nd
- ▶ Survey is voluntary; opt-in, self-administered questionnaire
- ▶ Surveyors collect completed questionnaires from respondents; mail-back option for passengers arriving late to gate area

Survey Questionnaire

C. ABOUT YOUR AIRPORT CHOICE

1. Please rank the three most important reasons for choosing Washington Dulles International Airport for your flight today.

(Please write #1, #2 or #3 in the appropriate spaces)

- Closest airport
 Easy road access
 Convenient limo, bus, or rail service
 Good parking facilities
 More convenient flight times
 Less expensive airfare
 Only airport with non-stop flights
 Only airport that serves market
 Frequent flyer specific airline
 Other
 (Specify) _____

2. If you could have arranged the airline schedule for your trip today, which airport would you have PREFERRED to use? (Please circle ONE answer)

- a. BWI Marshall
 b. Washington Dulles International
 c. Ronald Reagan Washington National
 d. No preference

3. Please indicate which other airport(s) you considered using today. (Please circle ALL answers that apply)

- a. BWI Marshall
 b. Ronald Reagan Washington National
 c. Other airport
 (Specify) _____
 d. Did not consider another airport

4. During the last twelve months, how many flights did you make from each of the following airports? (Please write a number in the appropriate spaces. Count today's trip as one flight)

- BWI Marshall
 Washington Dulles International
 Ronald Reagan Washington National

D. ABOUT YOURSELF

1. Please indicate the location of your current residence:

City/County State Zip Code Country

2. How many people live in your household?

_____ People (Enter '1' if you live alone)

3. Please circle your age bracket:

- a. 18 or younger d. 35-49
 b. 19-24 e. 50-64
 c. 25-34 f. 65 or older

4. Please circle the answer that approximates the total household annual income of all persons in your household:

- a. Less than \$15,000 e. \$80,000-119,999
 b. \$15,000-24,999 f. \$120,000-159,999
 c. \$25,000-44,999 g. \$160,000-199,999
 d. \$45,000-79,999 h. \$200,000 or more

If you were visiting the Washington-Baltimore area, please answer questions #5 and #6, then proceed directly to section E.

5. How many nights did you stay in the area?

_____ Nights (Enter '0' if you are leaving the same day you arrived)

6. Approximately how much did you spend PER DAY while you were in the area? (Include expenses which are meals, hotels, rental cars, etc. Do not include airfare. Please circle ONE answer)

- a. Less than \$100 e. \$400-499
 b. \$100-199 f. \$500-749
 c. \$200-299 g. \$750-999
 d. \$300-399 h. \$1,000 or more

If your air travel begins from this airport please answer Questions #7 and #8 below, then proceed to section E.

7. How many nights will you spend away on this trip?

_____ Nights (Enter '0' if you are returning today)

8. How many vehicles are usually available for use at your residence?

_____ Vehicles (Enter '0' if no vehicles are available)

E. PLEASE WRITE ANY COMMENTS YOU MAY WISH TO BRING TO OUR ATTENTION BELOW

Again, Thanks For Your Help!

| -

2011 WASHINGTON-BALTIMORE REGIONAL AIR PASSENGER SURVEY

TO DETERMINE LOCAL AIRPORT NEEDS



IAD

This survey is being conducted by:
 Metropolitan Washington Council of Governments
 Metropolitan Washington Airports Authority
 Maryland Aviation Administration
 in cooperation with the airlines
 serving the region's airports.

This survey concerns your trip today.
 Please complete this form, even if you have
 received a form on other days.

All answers are confidential.
 Personal identification is not required.
 Thank you for your cooperation.

2011 APS Data Collection Summary

Airport	Flights Surveyed	Revenue Passenger Count	Completed Surveys	Response Rate
BWI	229	22,933	8,766	38%
DCA	212	15,251	6,607	43%
IAD	243	21,137	8,057	38%
Total	684	59,321	23,430	39%
Mailback			133	
Grand Total			23,563	

*Survey results annualized

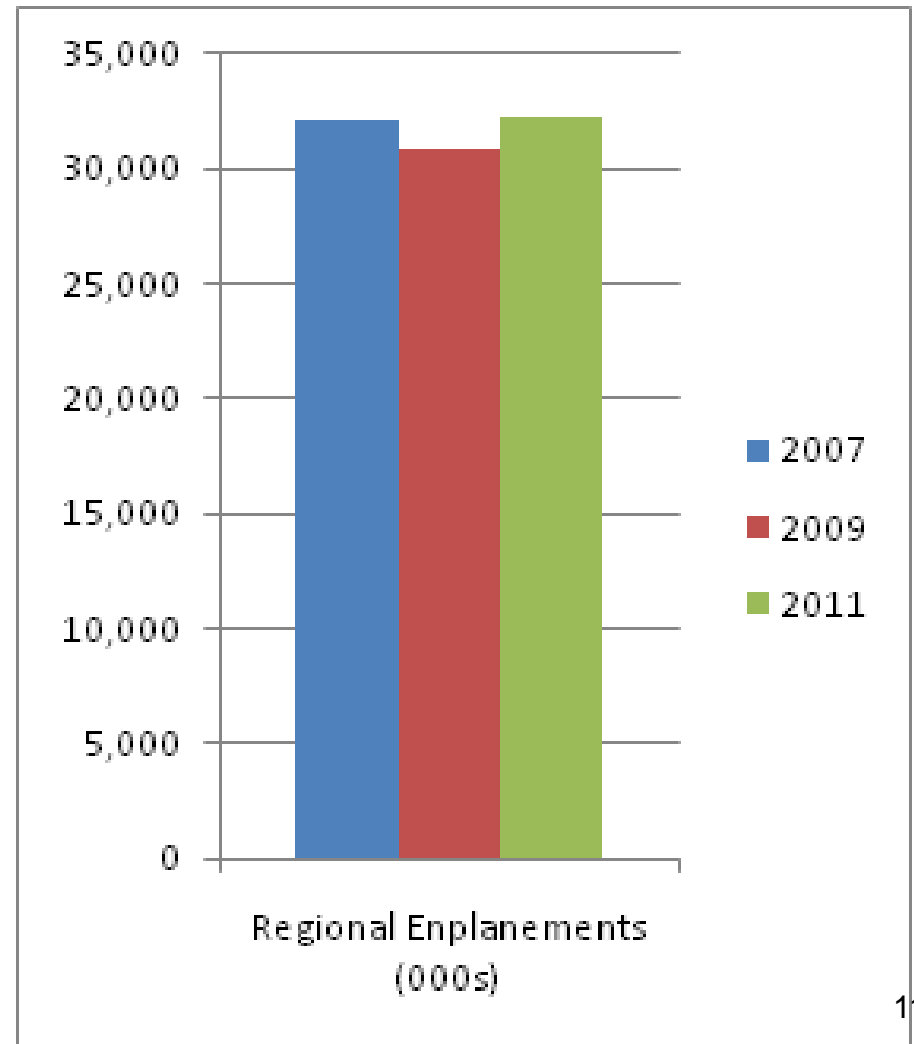
Transportation Findings

- ▶ Airport Use
- ▶ Airport Choice / Preference
- ▶ Trip Purpose
- ▶ Trip Origin
- ▶ Mode of Access

Airport Use - General

- Regional enplanements up slightly over 2009
- Regionally, both local originations and connections increased
- Different local origination / connecting characteristics at each airport

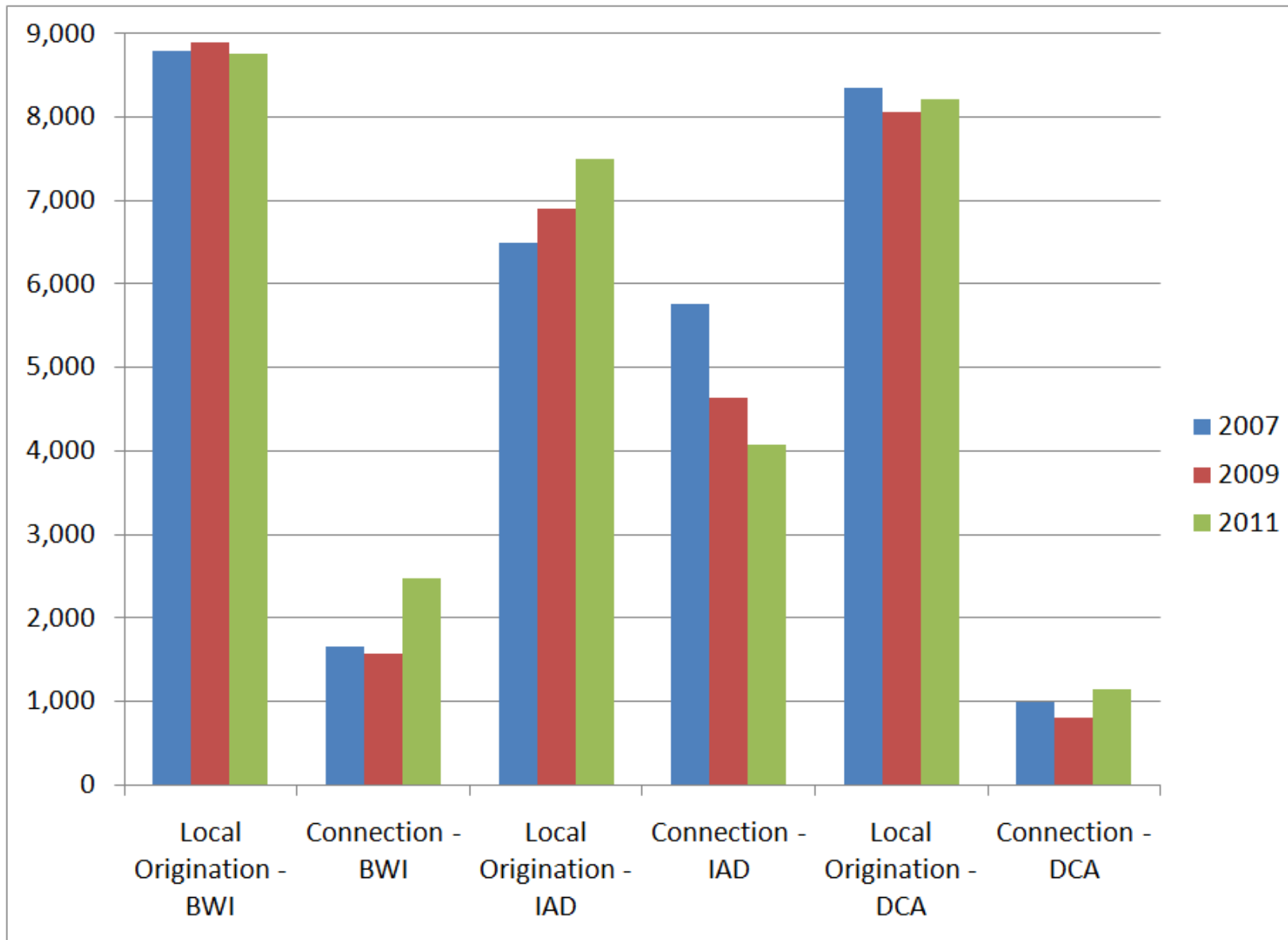
Total Annual Enplanements by Year



Airport Use: Annual Enplanements by Airport by Year (000s)



Annual Local Originations and Connecting Flights by Airport by Year (000s)

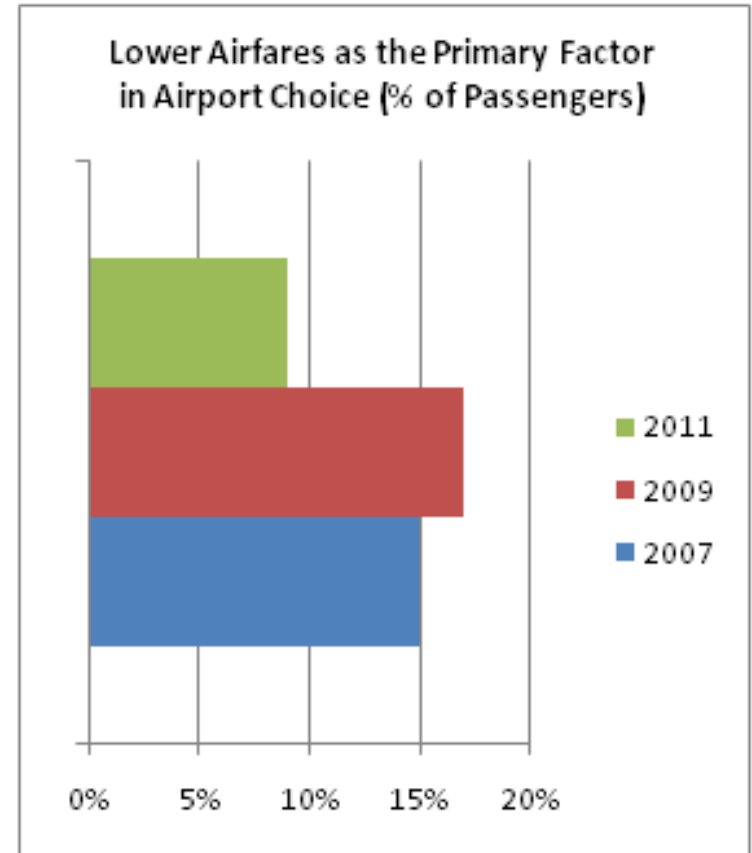


Airport Use – Local Originations vs. Connections

- Regionally, 76% of enplanements were local originations and 24% connecting flights, compared with 77% and 23% for 2009.
- Increase in proportion of connecting passengers at BWI attributed to merger of Southwest and AirTran (May 2011)
- Decrease in connecting passengers at IAD despite merger of United and Continental (October 2010)
- Survey analysis focused on local originations, since they utilize the surface transportation network

Airport Choice – Primary Factor

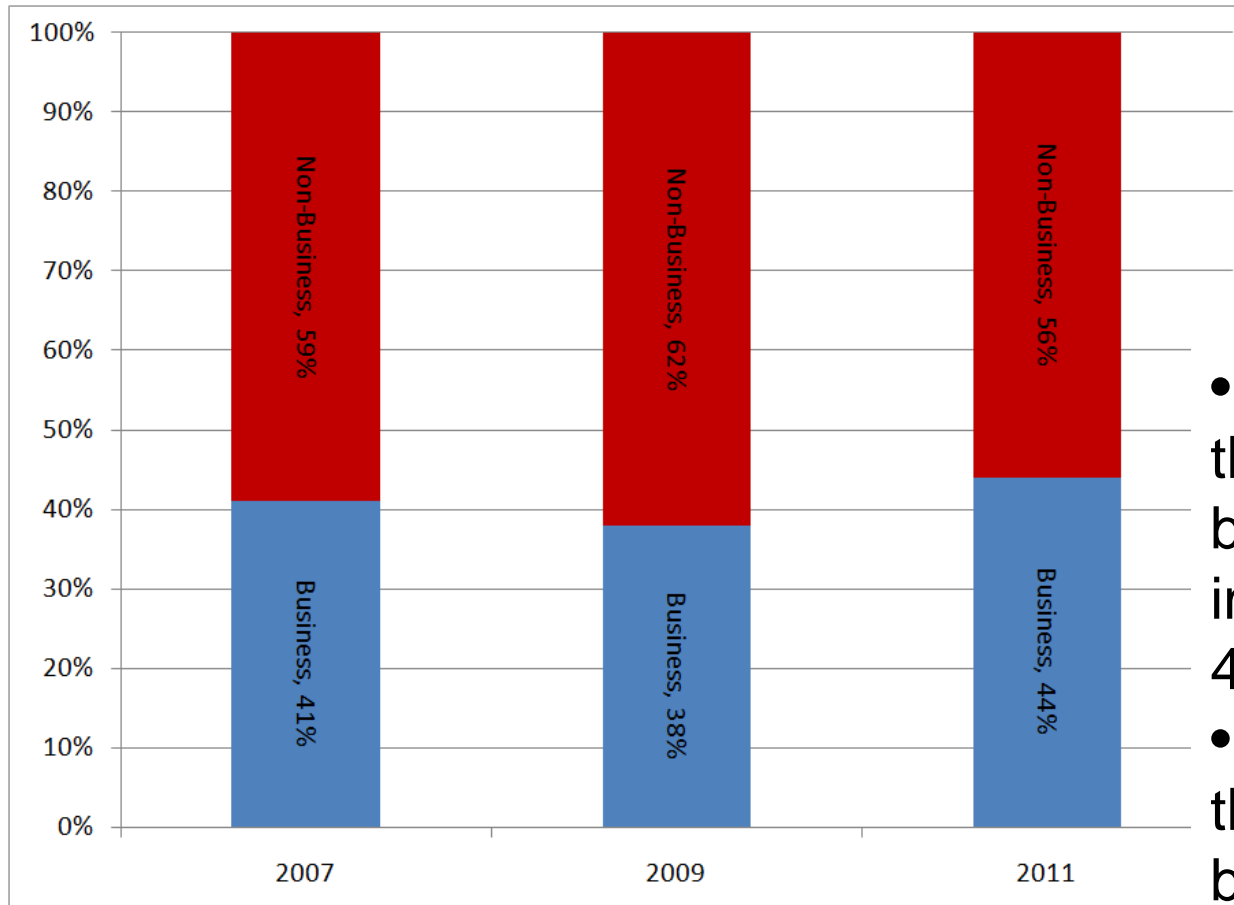
- Cost of airfare less of a factor, down from 2009 levels of 27% and 16% at BWI and IAD to 18% and 8% in 2011, respectively
- Accessibility (closest airport) still the biggest factor, but decreased from 61% in 2009 to 57% in 2011 for all airports
- By airport, accessibility factor unchanged at BWI, decreased from 53% to 42% at IAD, and from 72% to 71% at DCA
- Travelers more sensitive to value of travel time to airport than airfare



Airport Preference

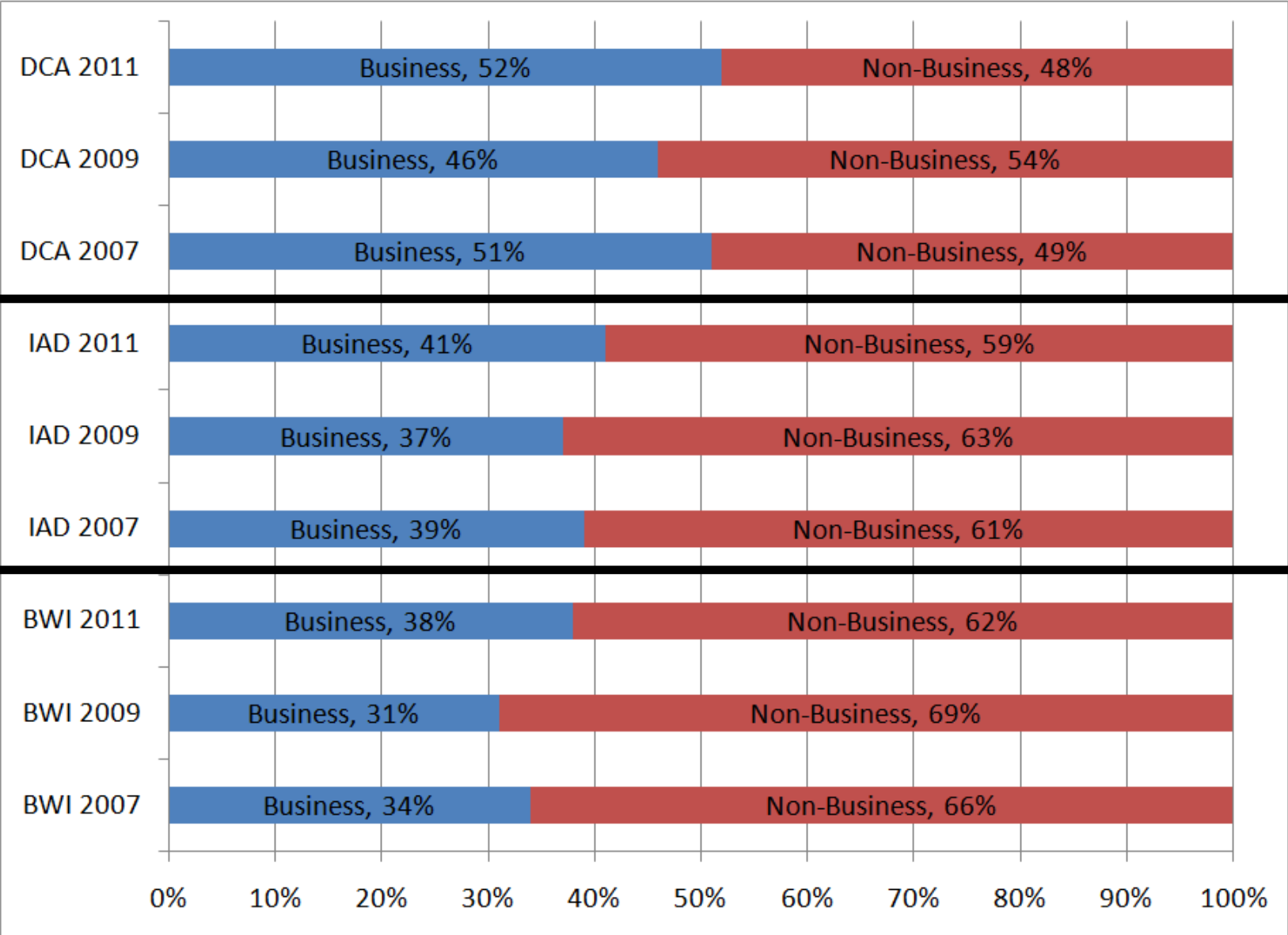
- Regionally, two-thirds of respondents indicated they were travelling from their preferred airport (unchanged from 2009)
- Residents more likely than non-residents to express an airport preference
- DCA is the most-preferred airport by both residents (36%) and non-residents (39%), followed by BWI (31% and 27%), and IAD (23% and 14%)

Trip Purpose – All Airports



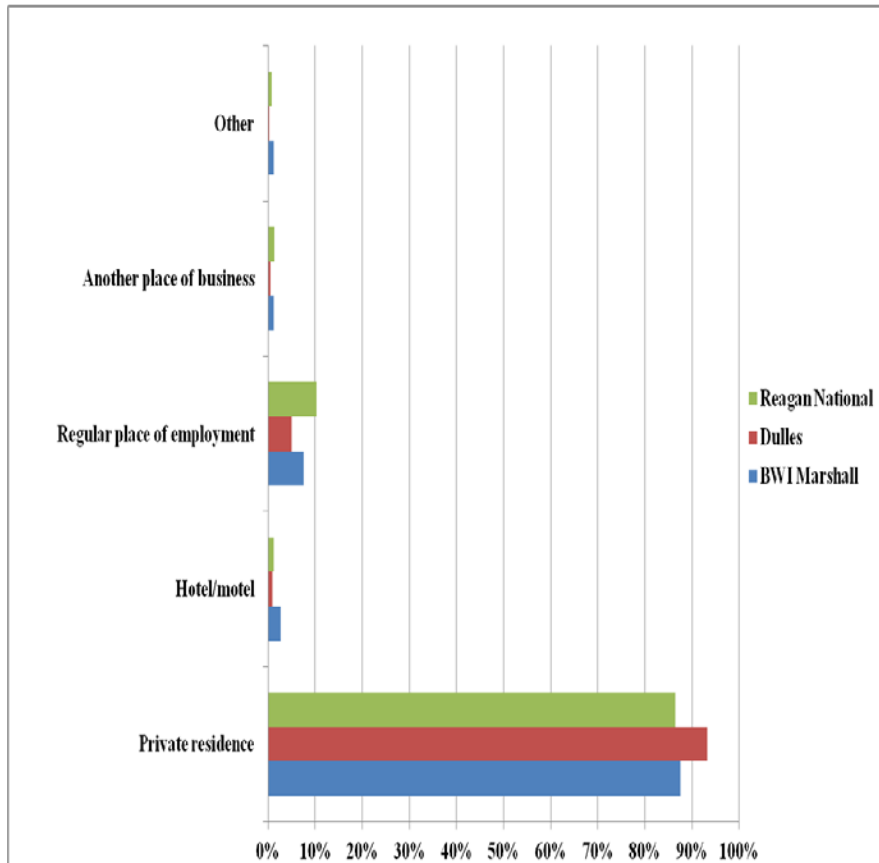
- Compared with 2009, the percentage of business travel has increased from 38% to 44%
- Compared with 2009, the percentage of non-business travel has decreased from 62% to 56% (effects of recession)

Trip Purpose By Airport by Year

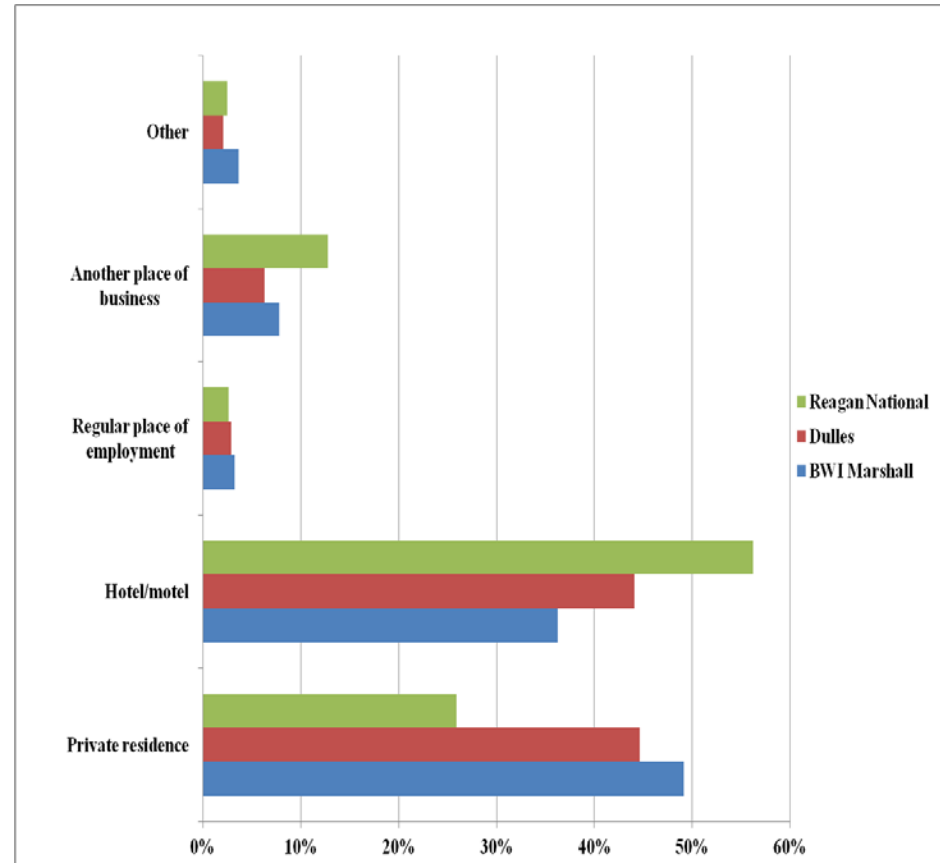


Air Traveler Trip Origin By Trip Purpose

Business

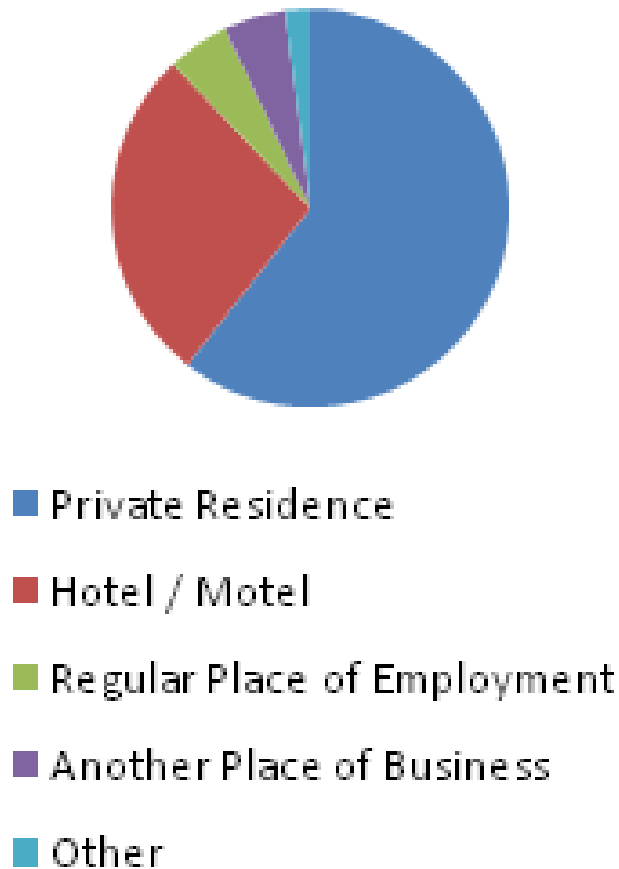


Non-Business



Trip Origin

**Local Air Passenger Trip
Origins - Regional**

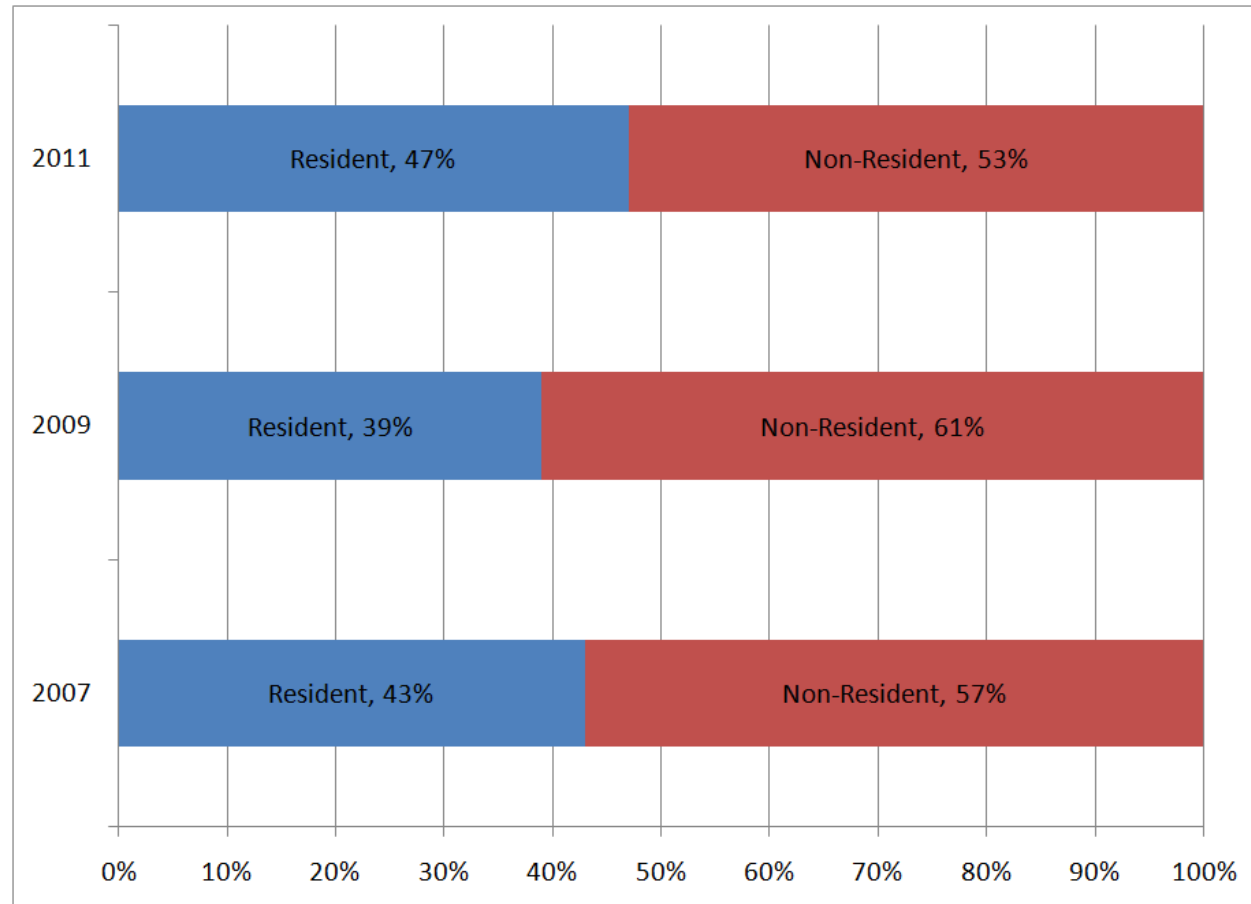


- By airport, about two-thirds of airport passengers' ground trips began at a private residence for both BWI and IAD, but only about half for DCA
- About one-third of airport passengers' ground trips began at a hotel for DCA, but only 21% at BWI and 26% at IAD

Air Traveler Resident Status

- For 2011, DCA highest proportion of non-residents (58%); in 2009 BWI highest proportion of non-residents (62%)
- For 2011, IAD highest proportion of residents (52%) and only airport with majority of resident travelers
- In 2009, IAD still highest proportion of residents (44%) but none of the three airports had a majority of resident travelers

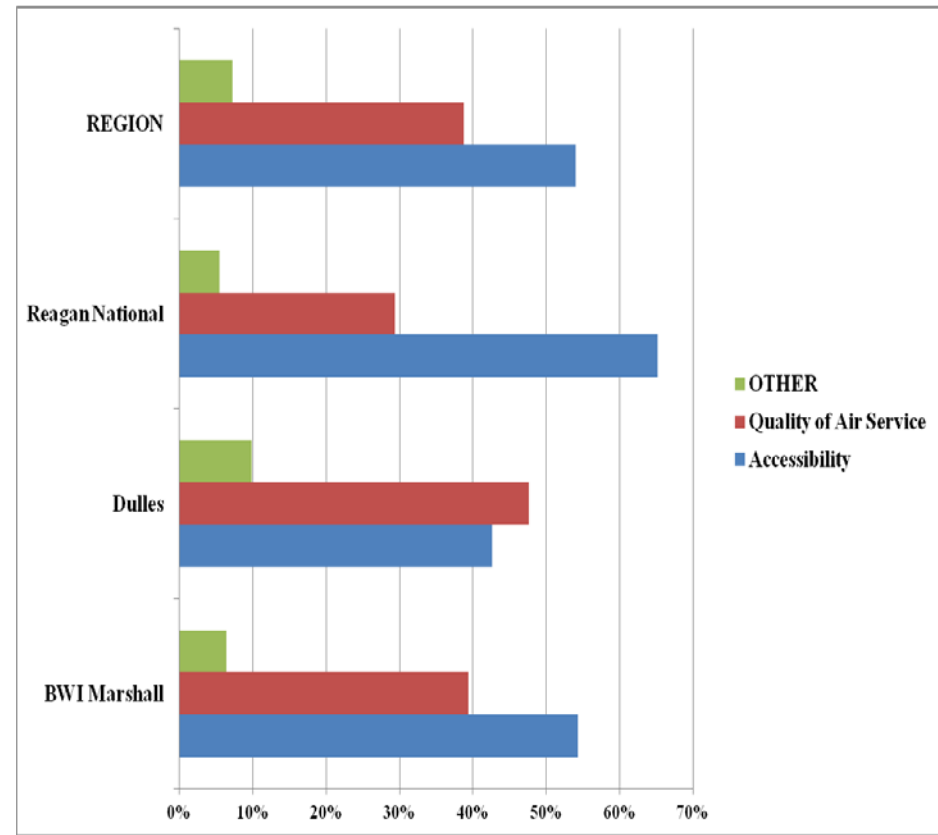
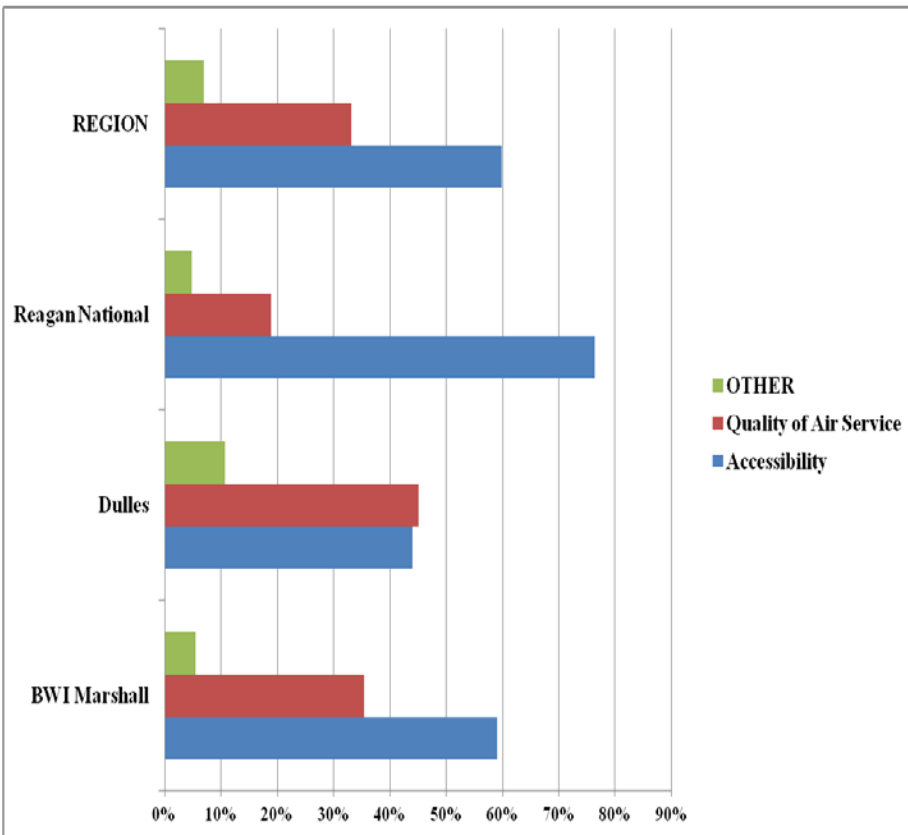
All Airports



Air Traveler Airport Choice By Resident Status

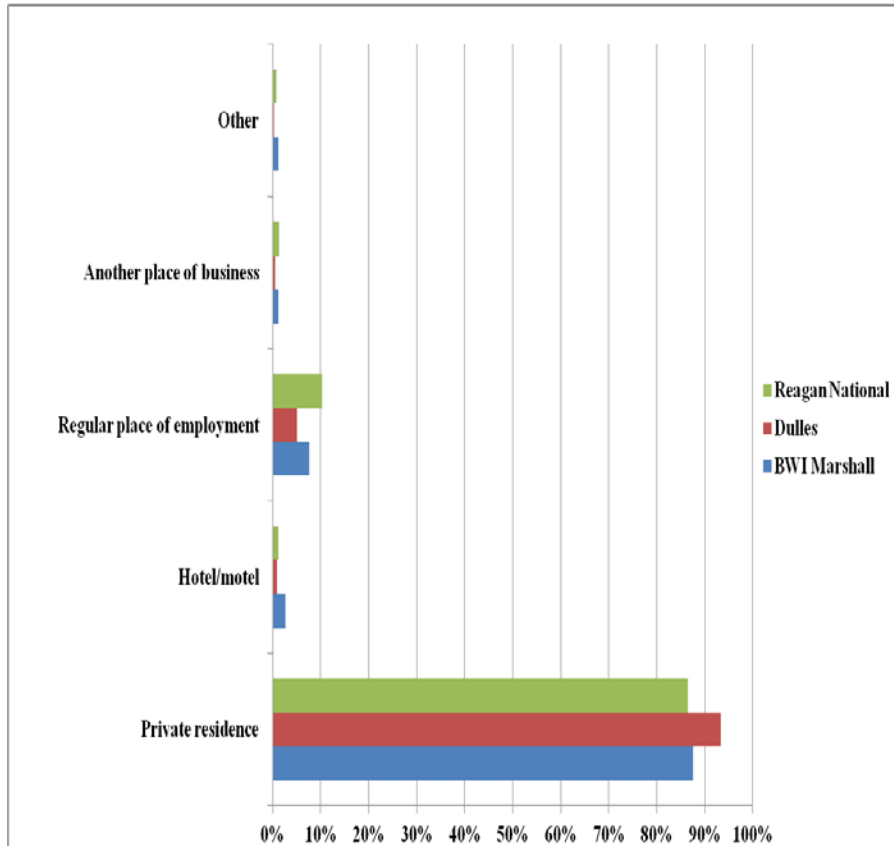
Resident

Non-Resident

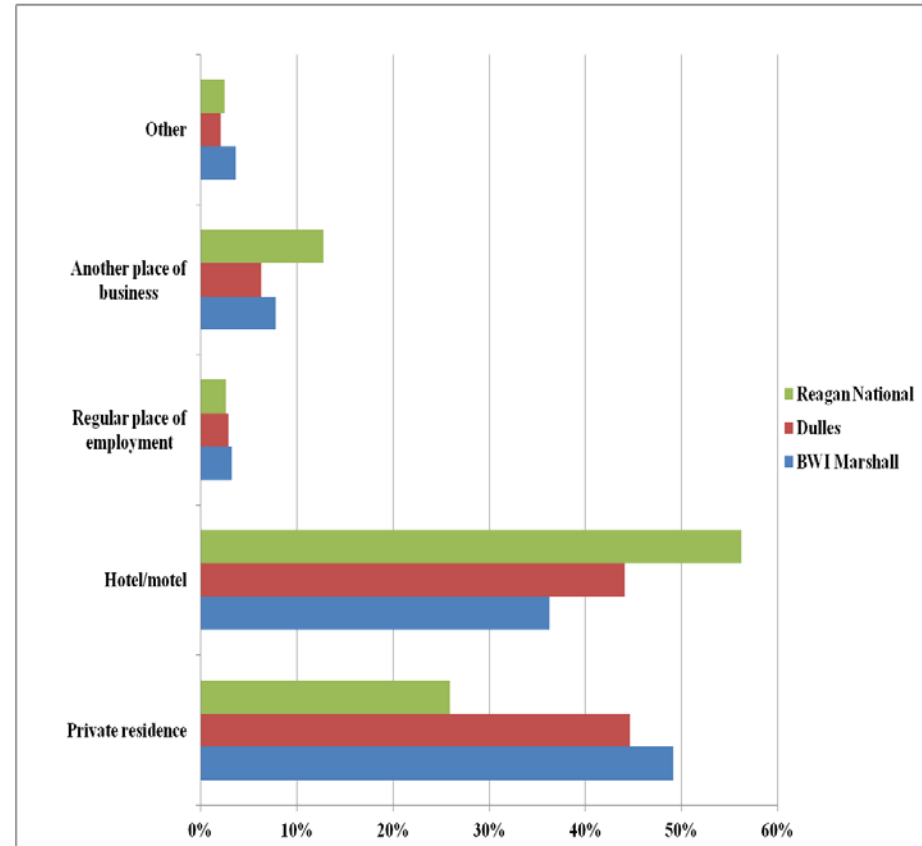


Air Traveler Trip Origin By Resident Status

Resident

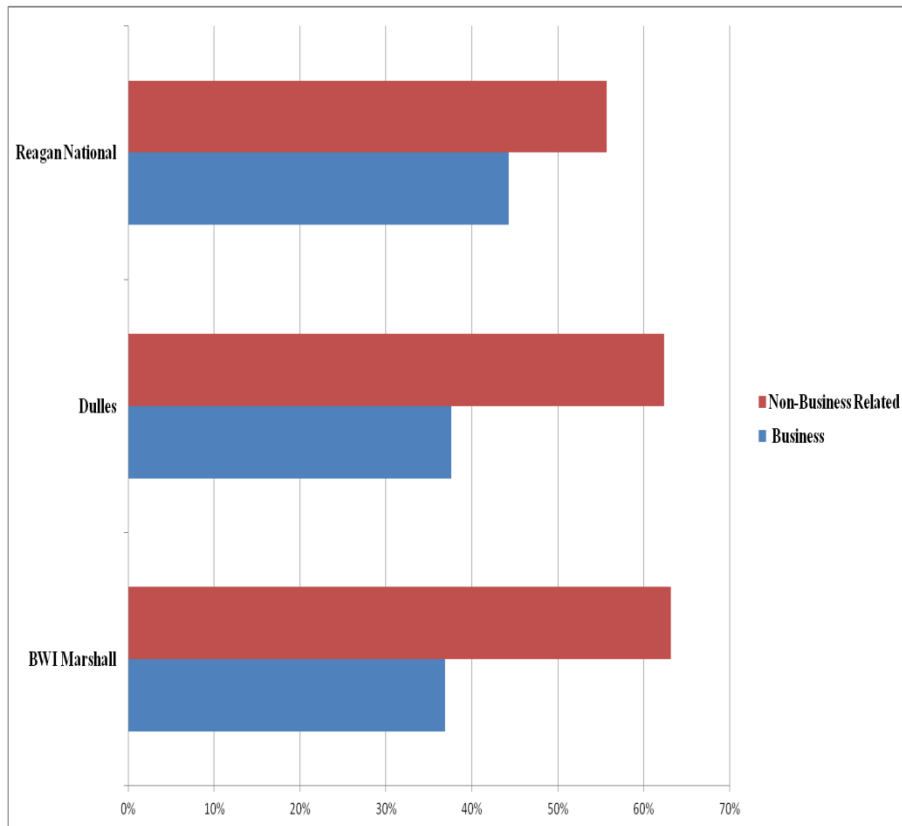


Non-Resident

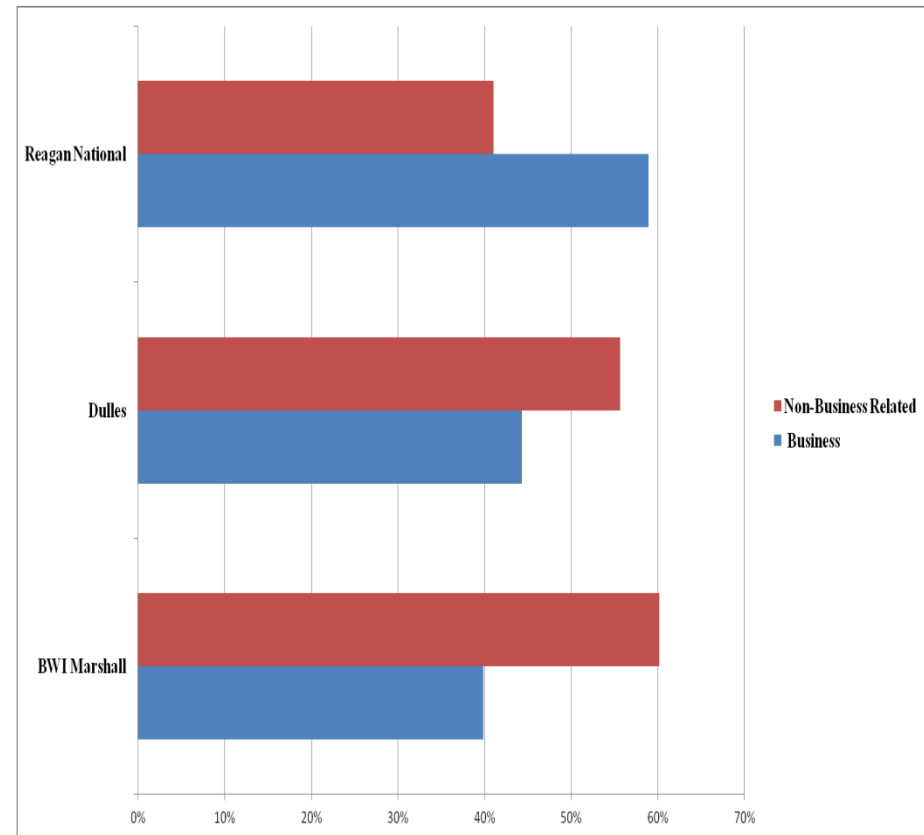


Air Traveler Trip Purpose By Resident Status

Resident

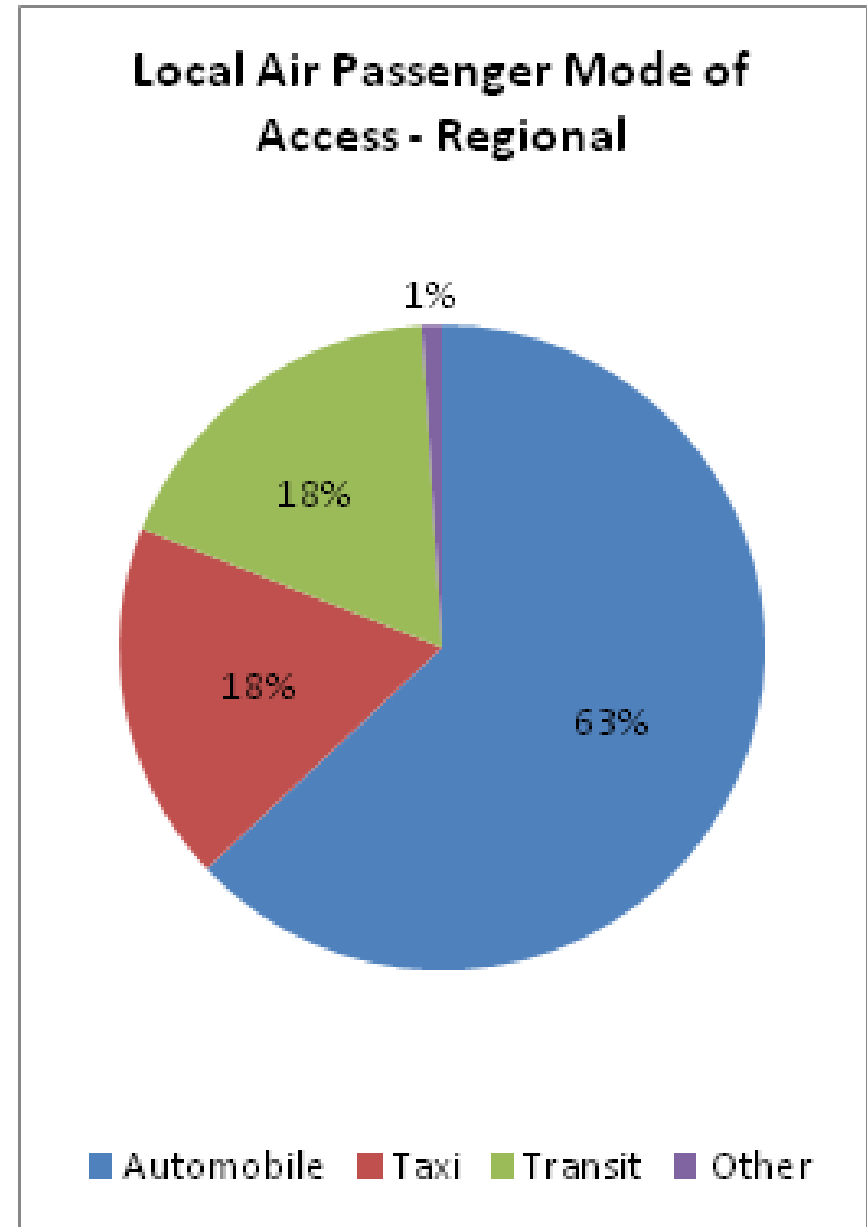


Non-Resident



Mode of Access

- The most common mode of access to the airports in 2011 continued to be the automobile (private and rental), accounting for 63% of all local originations
- Metrorail usage by passengers traveling to DCA continues to be among the highest proportions of any airport in the United States at 16%

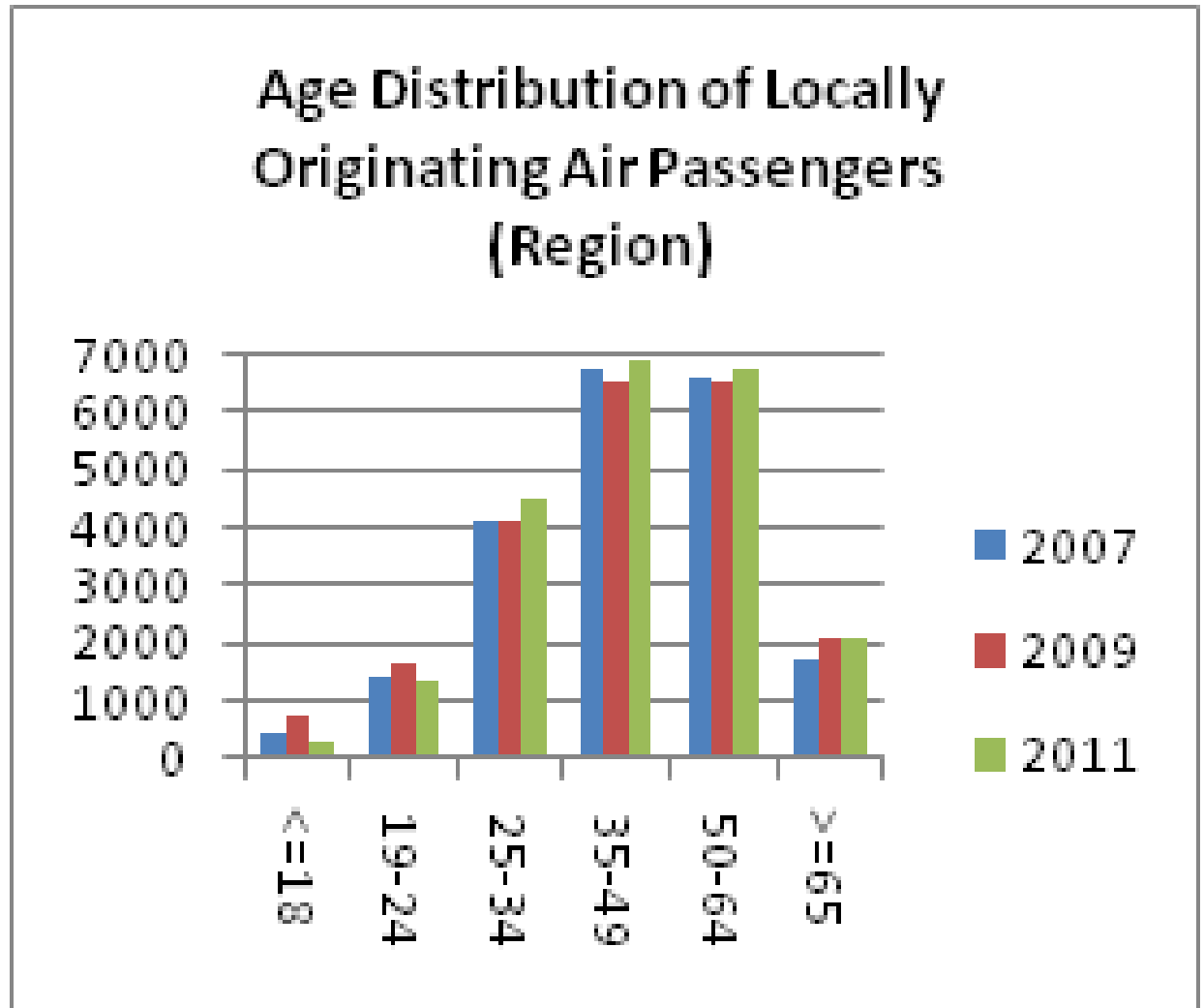


Air Travel Characteristics Findings

- ▶ Age
- ▶ Income

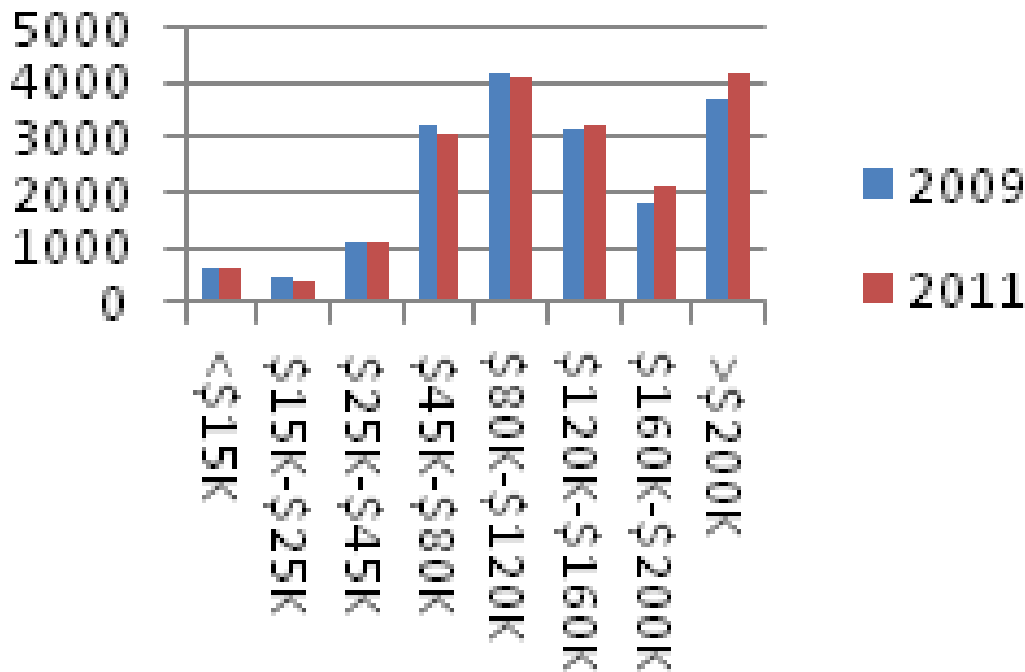
Air Traveler Age

- Slight increase in 25-34, 35-49, and 50-64 age groups over 2009
- Regional age distribution virtually identical to all three individual airports



Air Traveler Income

Income Distribution of Locally Originating Air Passengers (Region)



- A little over half of regional locally originating air passengers had annual household incomes of at least \$120,000, an increase over 2009 and 2007
- More than half of resident local originations have annual household incomes of more than \$120,000
- Affluence explains lack of price (airfare) sensitivity in airport choice

Air Traveler

Boarding Pass & Bag Check Stop

- ▶ The content of air passenger survey changed in 2009 to include a question where and if passengers had made a stop for boarding pass and/or bag check at the following:
 - A. Curbside agent for boarding pass
 - B. Curbside agent for bag check
 - C. E-ticket kiosk for boarding pass
 - D. E-ticket kiosk for bag check
 - E. Ticket agent in terminal for boarding pass
 - F. Ticket agent in terminal for bag check
 - G. None of the above

Conclusions...so far (1)

- ▶ Airport passenger traffic has grown over 2009
- ▶ Proportion of business travel has grown over 2009 at all airports
- ▶ Proportion of travel by area residents has grown over 2009 at all airports
- ▶ Each airport's regional share of passengers generally constant since 2007

Conclusions...so far (2)

- ▶ **Airport Choice**
 - DCA – Accessibility
 - BWI – Quality of Service (less expensive airfare)
 - IAD – Quality of Service (only airport that serves market)
- ▶ **Proportion of local originations (using airport ground access network) generally constant but travel base growing**
- ▶ **Private auto dominant mode of access except at DCA**
- ▶ **Most locally originating travelers affluent and value time highly**

Next Steps (2)

- ▶ Geocode survey file and conduct further analysis
- ▶ 2011 Air Passenger Survey Geographic Findings Report (to Aviation Technical Subcommittee and TPB Technical Committee, Spring 2013)
- ▶ Spring 2013: begin preparations for Fall 2013 Air Passenger Survey