

Transportation Planning Board
November 28, 2012
Agenda Item #13

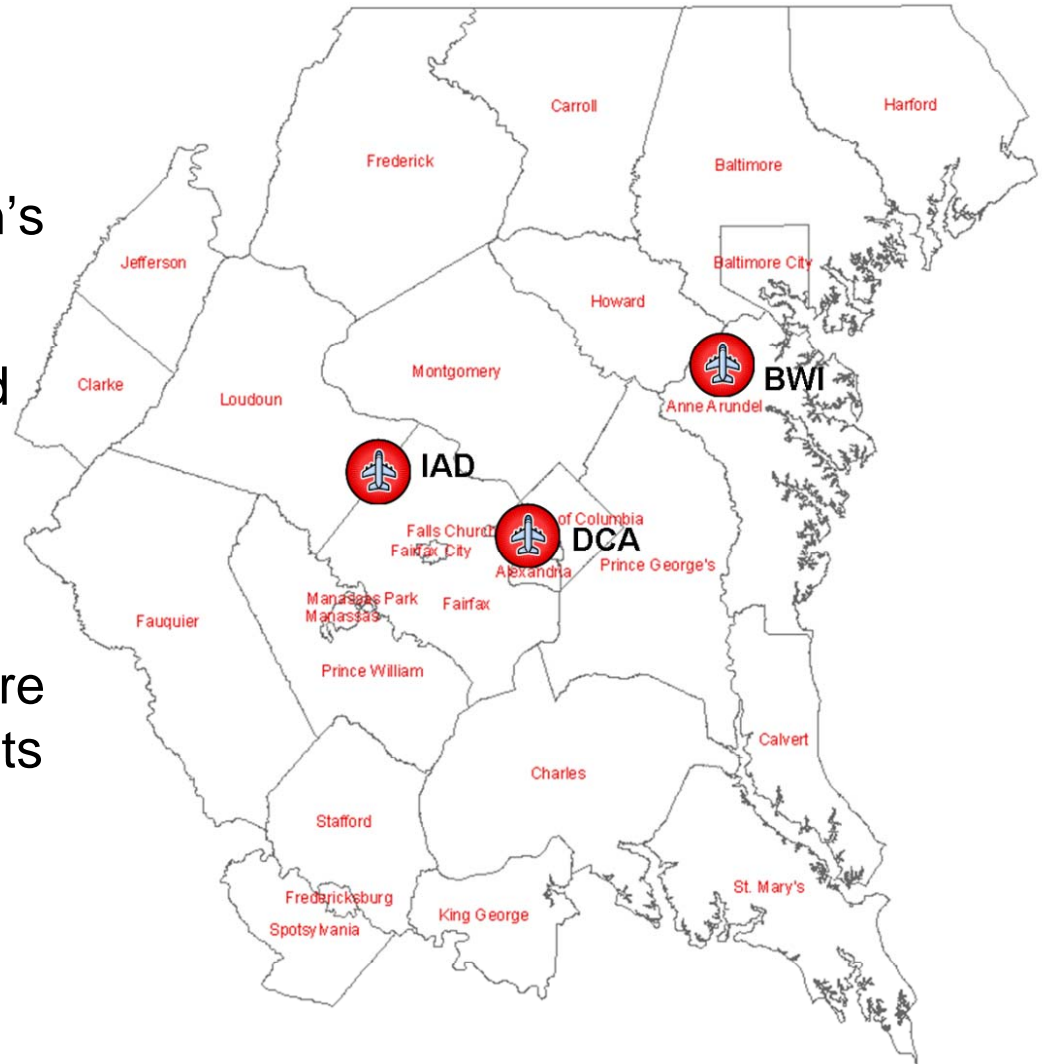
Transportation and Air Traveler Characteristics Findings from the 2011 Washington-Baltimore Regional Air Passenger Survey

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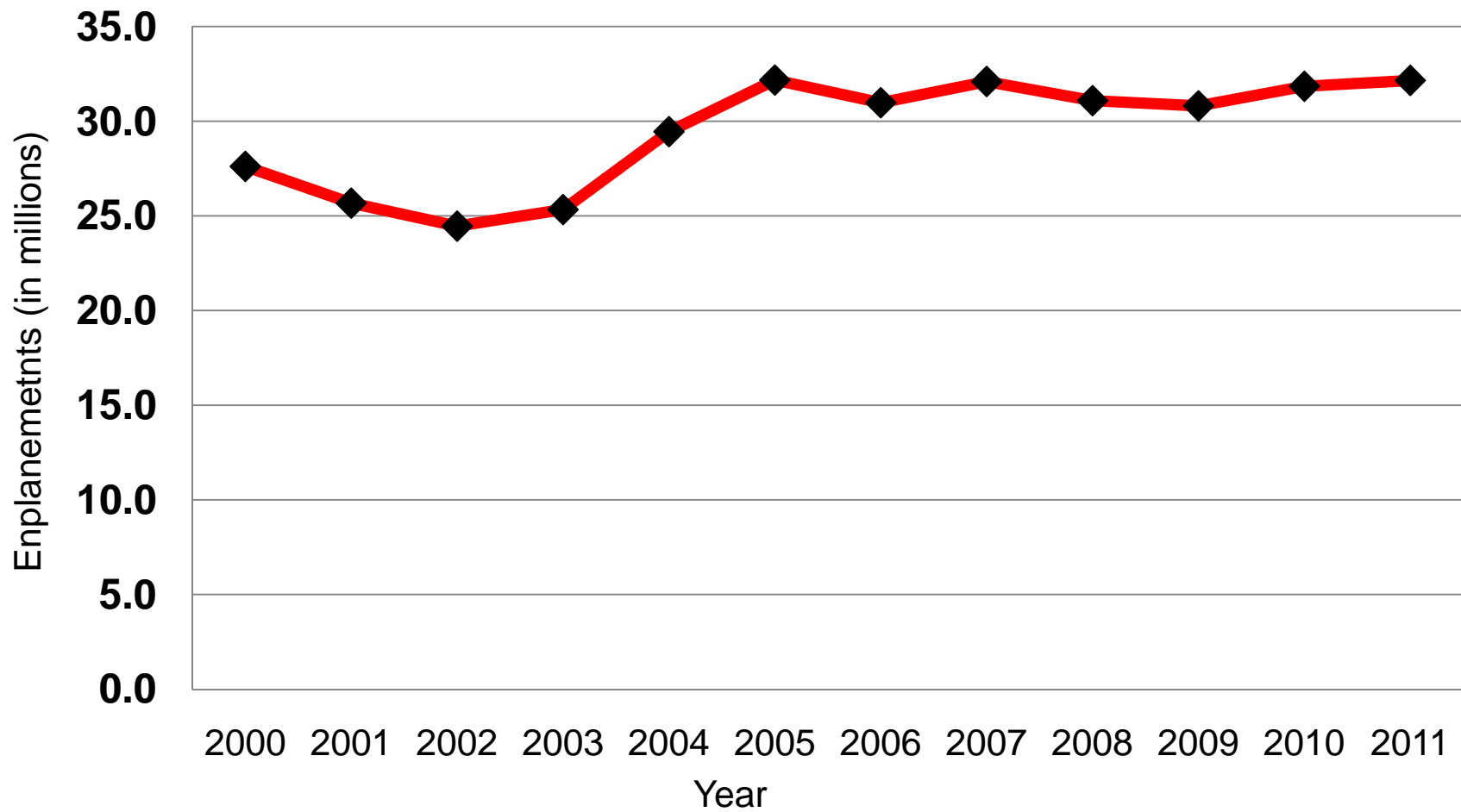
Rich Roisman
DTP Staff

Regional Air Passenger Survey Overview

- ▶ Current data to support planning for airport facilities and services
- ▶ Survey every two years at region's three commercial airports
- ▶ Random sample of domestic and international flights during two-week survey period in late October / early November
- ▶ Passengers surveyed at departure gates while waiting to board flights
- ▶ Approximately 40% of surveyed passengers completed and returned a survey questionnaire

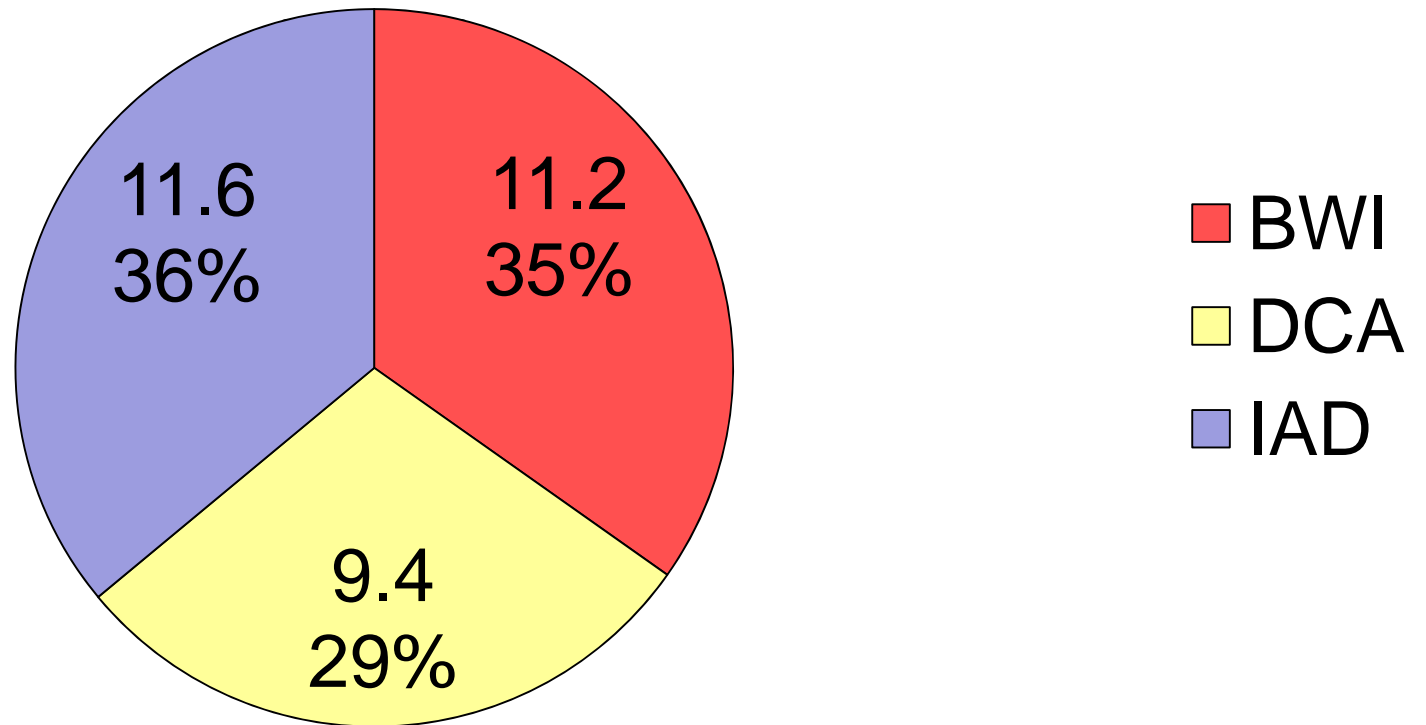


Regional Air Passenger Enplanements Trend (2000 – 2011)



More than 32 million air passengers boarded flights at the region's commercial airports in 2011

Total Annual Enplanements
(in Millions)

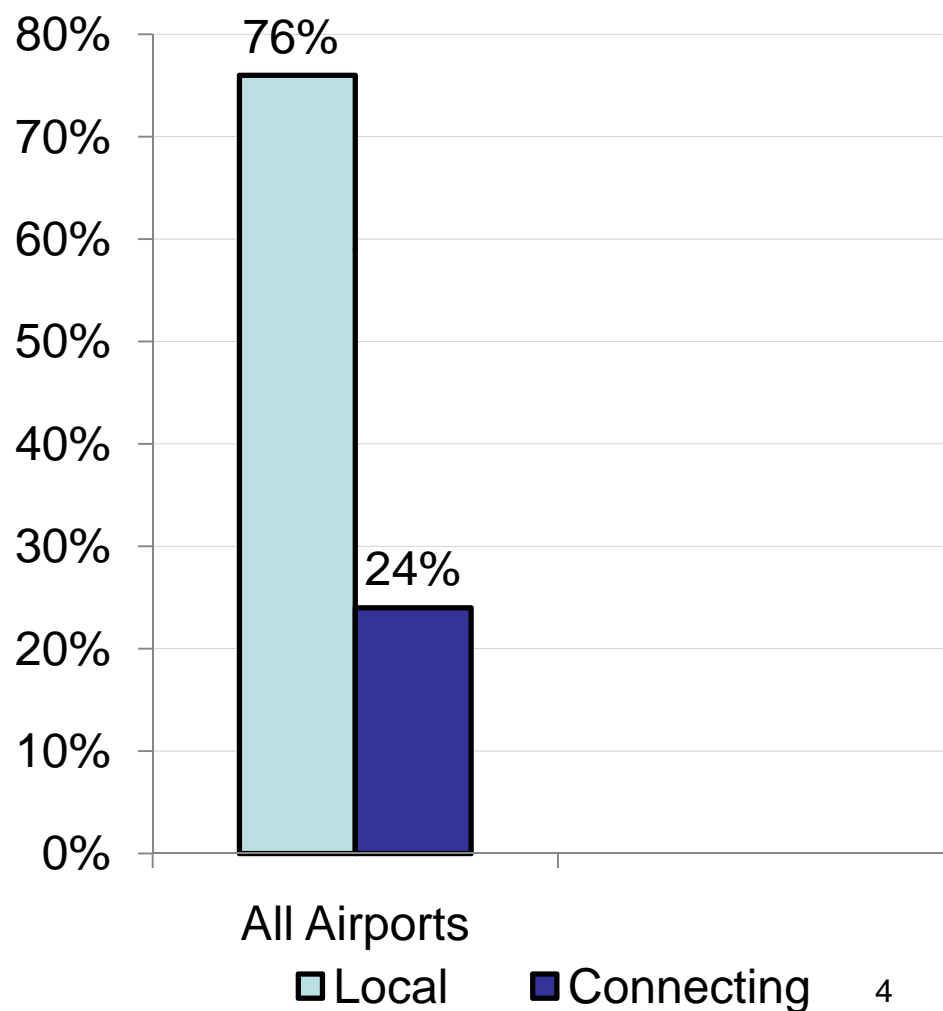


32.2 Million

Locally Originating vs. Connecting Passengers

Connecting passengers
account for:

- ▶ 35% of IAD enplanements
- ▶ 22% of BWI enplanements
- ▶ 12% of DCA enplanements



Trip Origins of Locally Originating Air Passengers

Originating at a private residence:

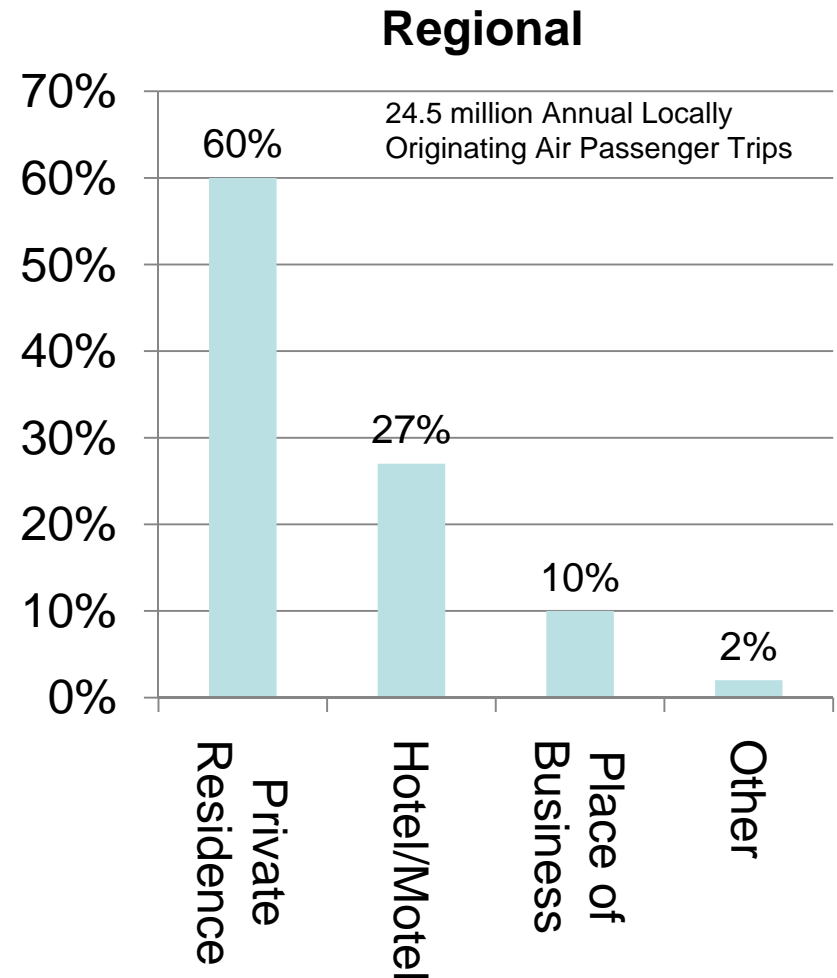
- ▶ 67% for BWI and IAD
- ▶ 50% for DCA

Originating at a hotel or motel:

- ▶ 21% for BWI
- ▶ 26% for IAD
- ▶ 33% for DCA

Originating at a place of business:

- ▶ 10% at BWI
- ▶ 8% at IAD
- ▶ 14% at DCA



Air Passenger Mode of Travel to Airport

Usage of private and rental cars:

- ▶ 78% at BWI
- ▶ 68% at IAD
- ▶ 43% at DCA

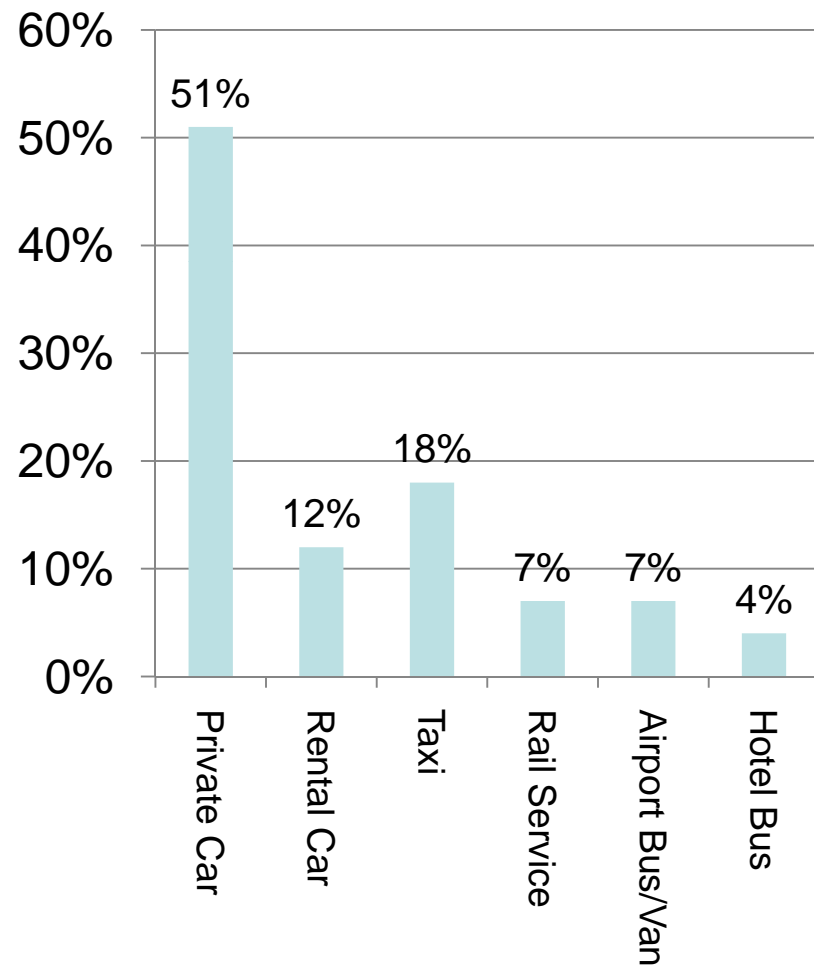
Use of taxis:

- ▶ 6% at BWI
- ▶ 17% at IAD
- ▶ 31% at DCA

Use of rail service:

- ▶ 16% at DCA by Metrorail (among highest in the nation)
- ▶ 2% at BWI by MARC/AMTRAK service

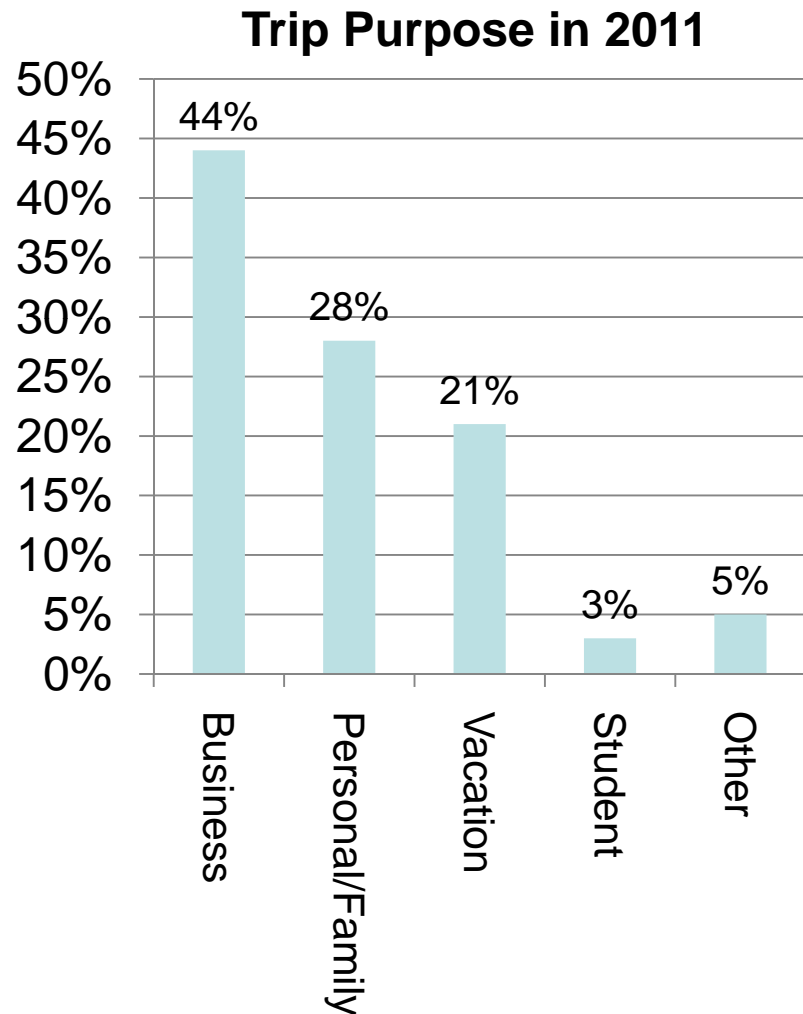
Mode of Access in 2011



Air Passenger Trip Purposes

Compared to 2009:

- ▶ Business travel up to 44% from 38%
- ▶ Government-related business up from 18% to 20%
- ▶ Non-government related business up from 20% to 24%
- ▶ Vacation trips down from 24% to 21%
- ▶ School trips down from 5% to 3%



Factors Influencing Airport Choice by Trip Purpose

	Business	Non-Business	All
Closest airport	62%	55%	58%
Better public ground transportation	2%	2%	2%
Better access roads and parking	2%	3%	2%
More convenient flight times	7%	6%	7%
Only airport with direct flight	7%	6%	7%
Less expensive airfare	9%	19%	14%
Frequent flyer with specific airline	3%	3%	3%
Only airport serving market	2%	2%	2%
Other	5%	4%	4%

Factors Influencing Airport Choice for Business Travelers – by Airport

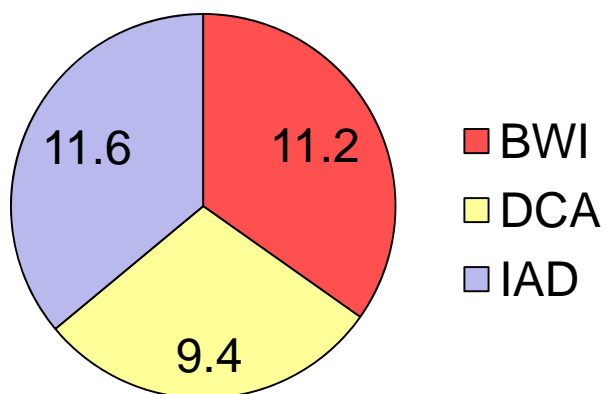
	BWI	DCA	IAD	All
Closest airport	60%	74%	47%	62%
Better public ground transportation	0%	5%	0%	2%
Better access roads and parking	3%	1%	2%	2%
More convenient flight times	6%	7%	9%	7%
Only airport with direct flight	4%	3%	15%	7%
Less expensive airfare	18%	3%	8%	9%
Frequent flyer with specific airline	3%	2%	6%	3%
Only airport serving market	2%	1%	5%	2%
Other	4%	4%	7%	5%

Factors Influencing Airport Choice for Non-Business Travelers – by Airport

	BWI	DCA	IAD	All
Closest airport	57%	63%	47%	55%
Better public ground transportation	1%	5%	0%	2%
Better access roads and parking	3%	2%	3%	3%
More convenient flight times	5%	6%	7%	6%
Only airport with direct flight	4%	4%	12%	6%
Less expensive airfare	24%	14%	16%	19%
Frequent flyer with specific airline	2%	2%	5%	3%
Only airport serving market	2%	1%	4%	2%
Other	3%	3%	6%	4%

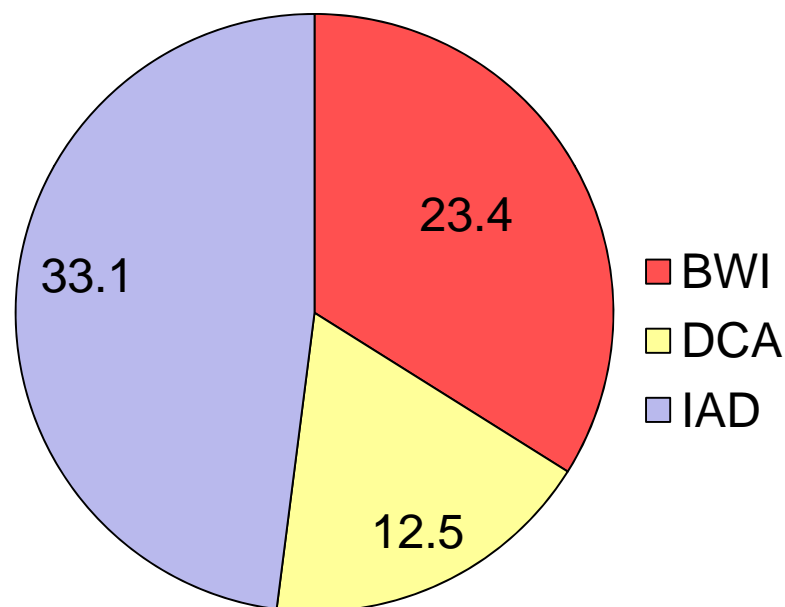
FAA Forecast Increase in Regional Air Passengers

2011



32.2 Million
Air Passengers

2040



69.0 Million
Air Passengers

Issues for the Future

- ▶ By 2040, air passenger travel at the region's three major airports is forecast to more than double, with most of the growth projected to occur at BWI and IAD
- ▶ Significant air cargo growth forecast at BWI and IAD by USDOT
- ▶ Continued growth in domestic and international air travel, especially business travel, and air cargo, is vitally important to the region's economy
- ▶ Improving ground access connections to BWI and IAD will be very important to the region's future economic growth and prosperity