

# Findings from the 2013 Washington-Baltimore Air Passenger Survey

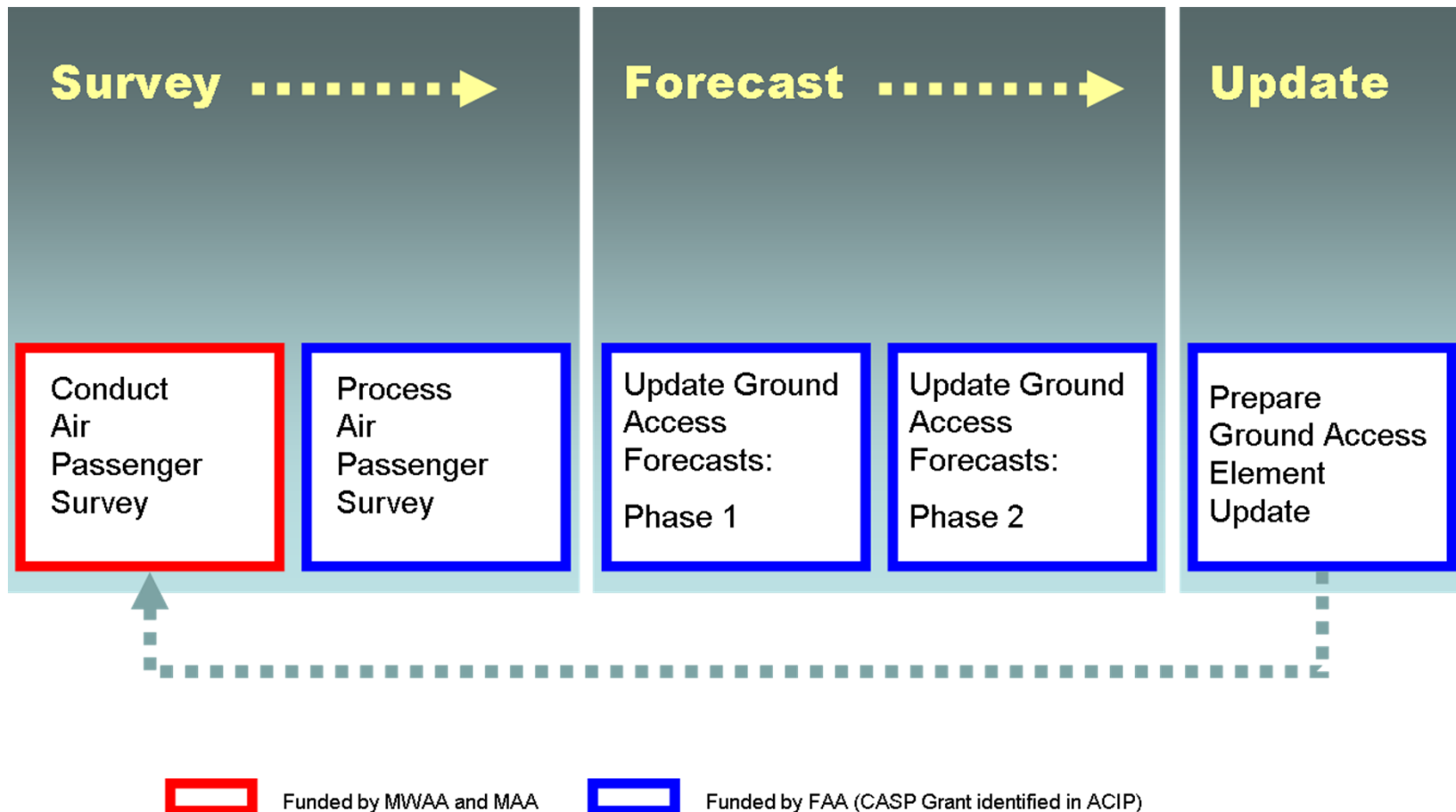
Transportation Planning Board  
October 15, 2014



Rich Roisman  
Department of Transportation Planning

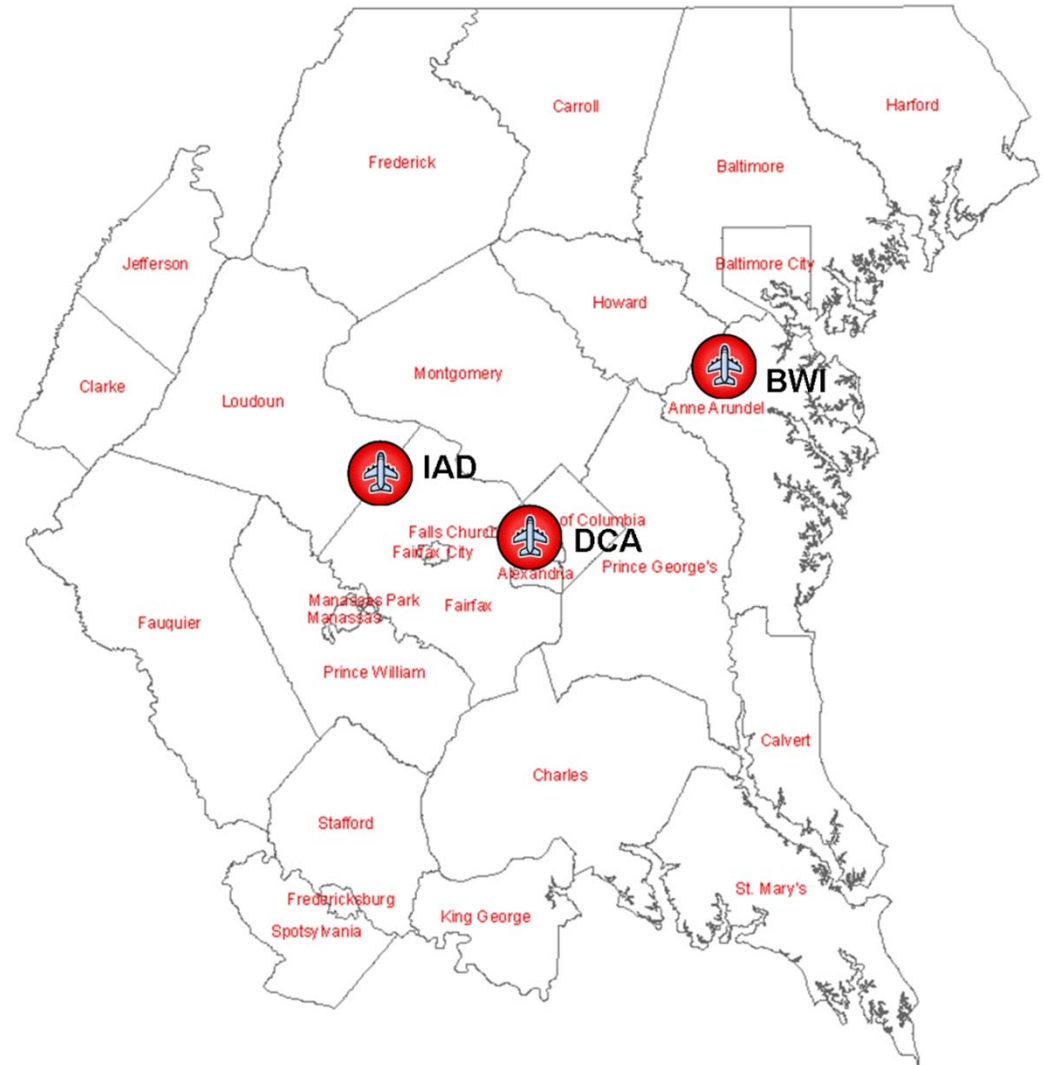
# Current CASP Process and Projects

The CASP cycle has three (3) distinct phases each containing specific projects and milestones.

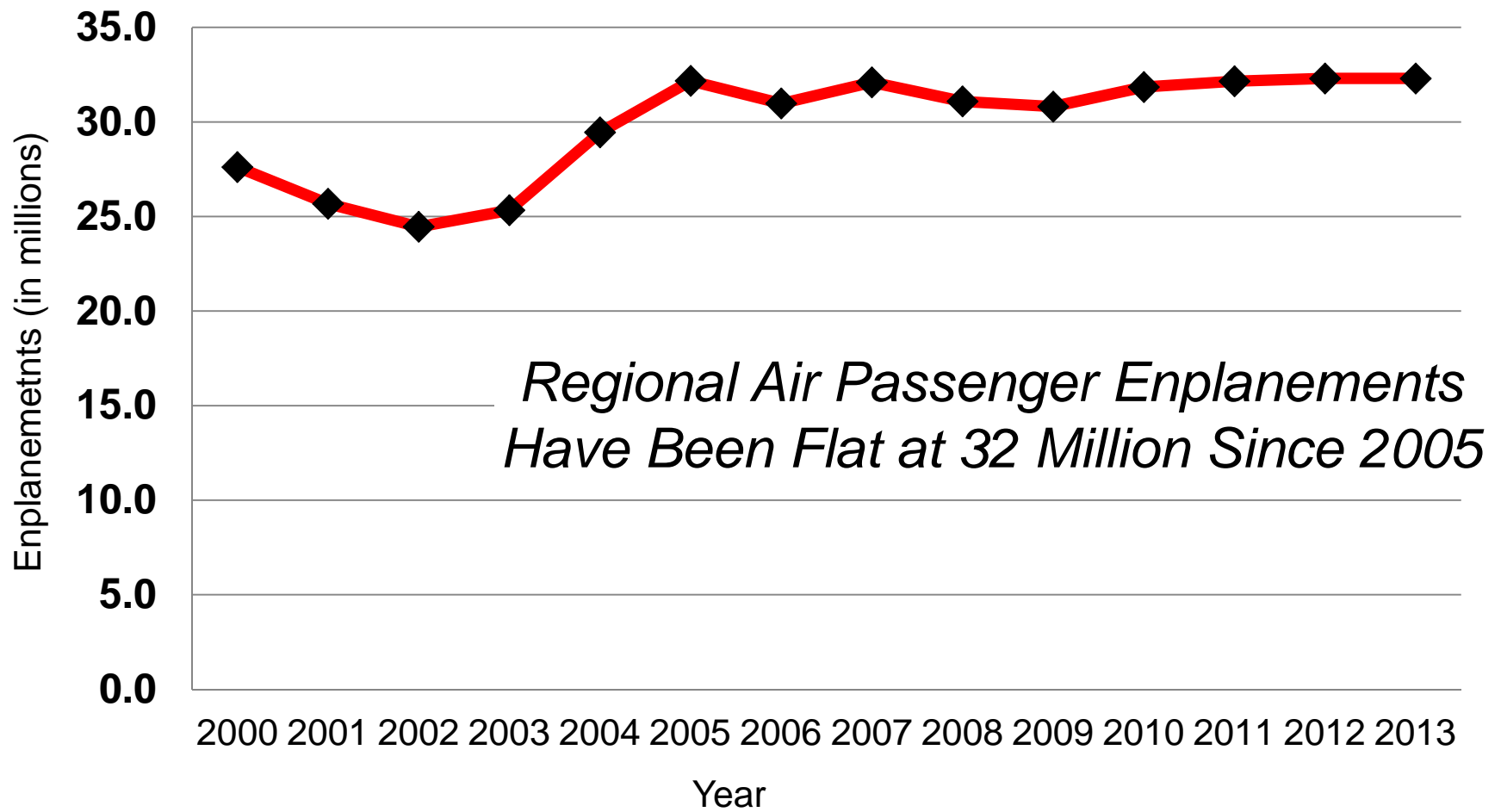


# Having Three Commercial Airports is a Key Regional Asset

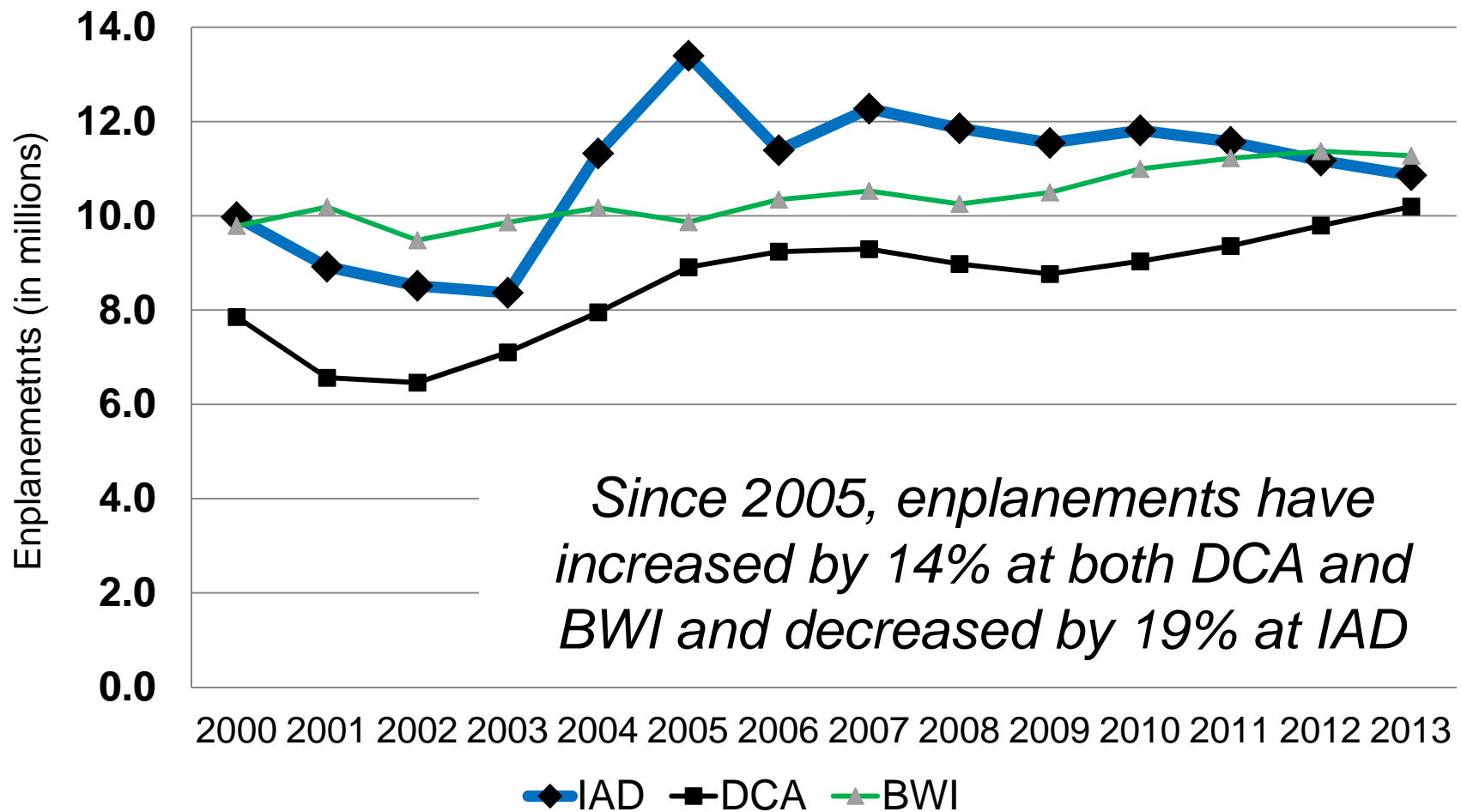
- ▶ Historically, three airports with three distinct markets
- ▶ Serve air passengers and air cargo
- ▶ Multimodal ground access



# Regional Air Passenger Enplanements Trend (2000 – 2013)



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



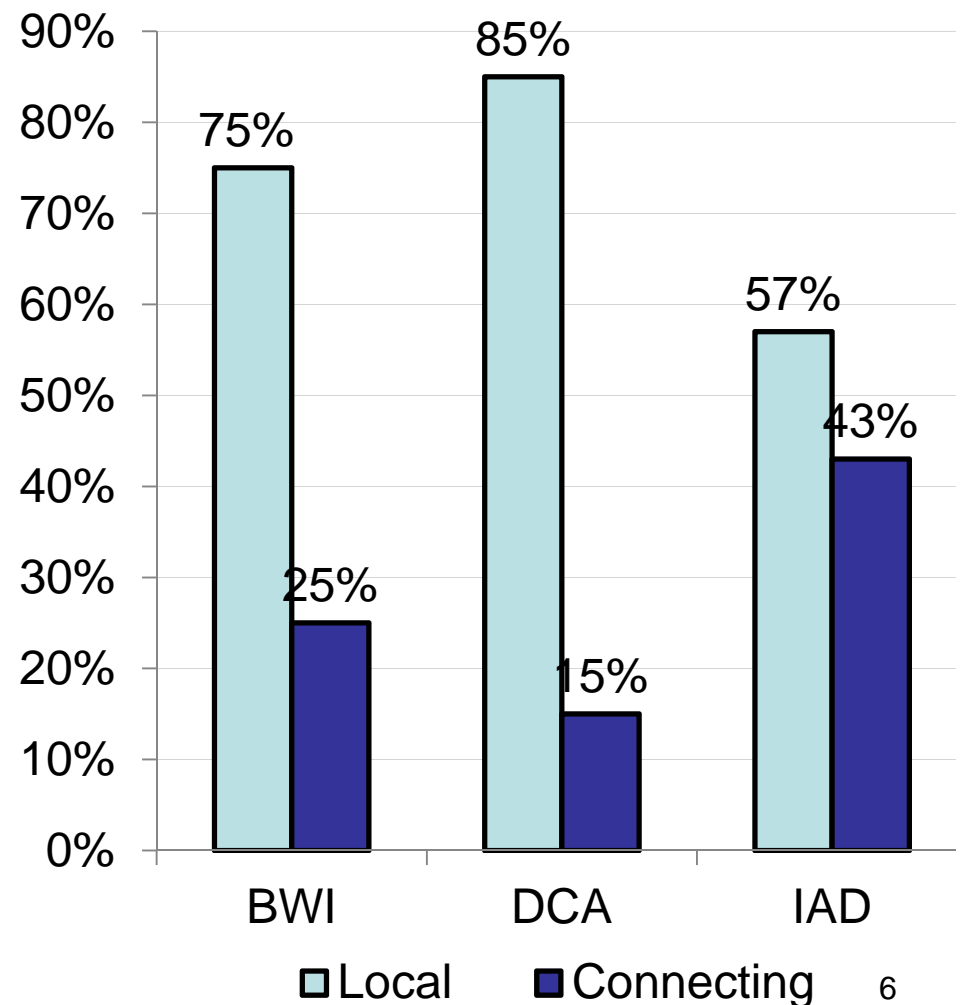
# Air Passenger Survey Background

- ▶ A random sample of approximately 673 flights (592 domestic and 81 international)
- ▶ Survey started on Wednesday, October 9<sup>th</sup> and ended on Tuesday, October 22<sup>nd</sup> 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%
<b>Total</b>	<b>673</b>	<b>69,060</b>	<b>24,742</b>	<b>36%</b>

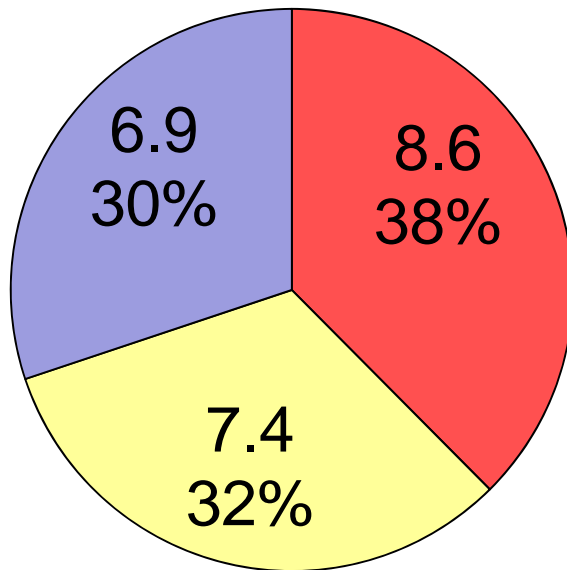
# Locally Originating vs. Connecting Passengers (2013 Survey)

- ▶ 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



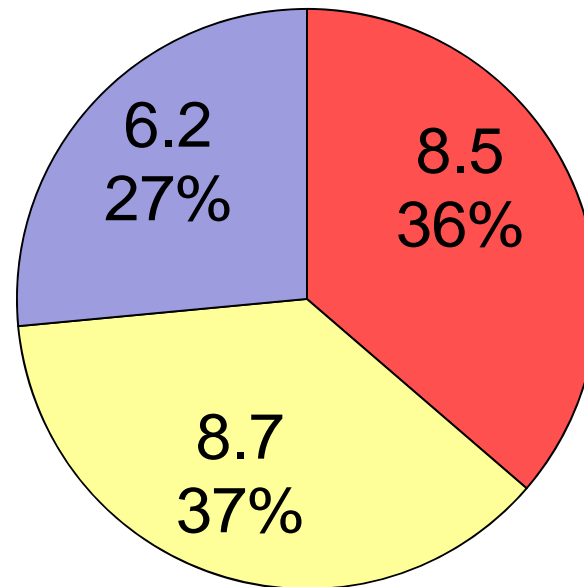
# Change in Locally Originating Passengers by Airport (Survey)

2005

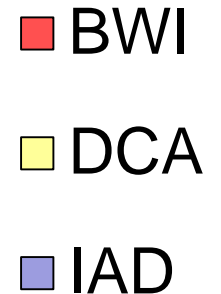


22.9 Million

2013



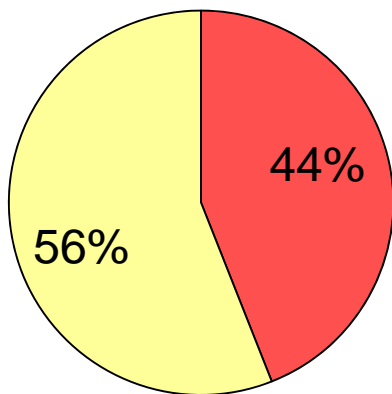
23.4 Million





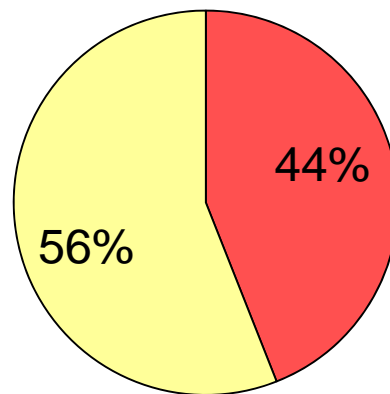
# Change in Trip Purpose for Locally Originating Air Passengers (Survey)

2005



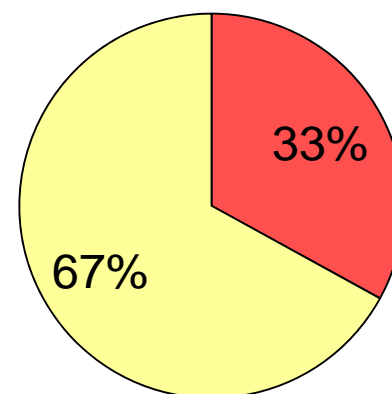
22.9 Million  
Passengers

2011



24.4 Million  
Passengers

2013



23.4 Million  
Passengers

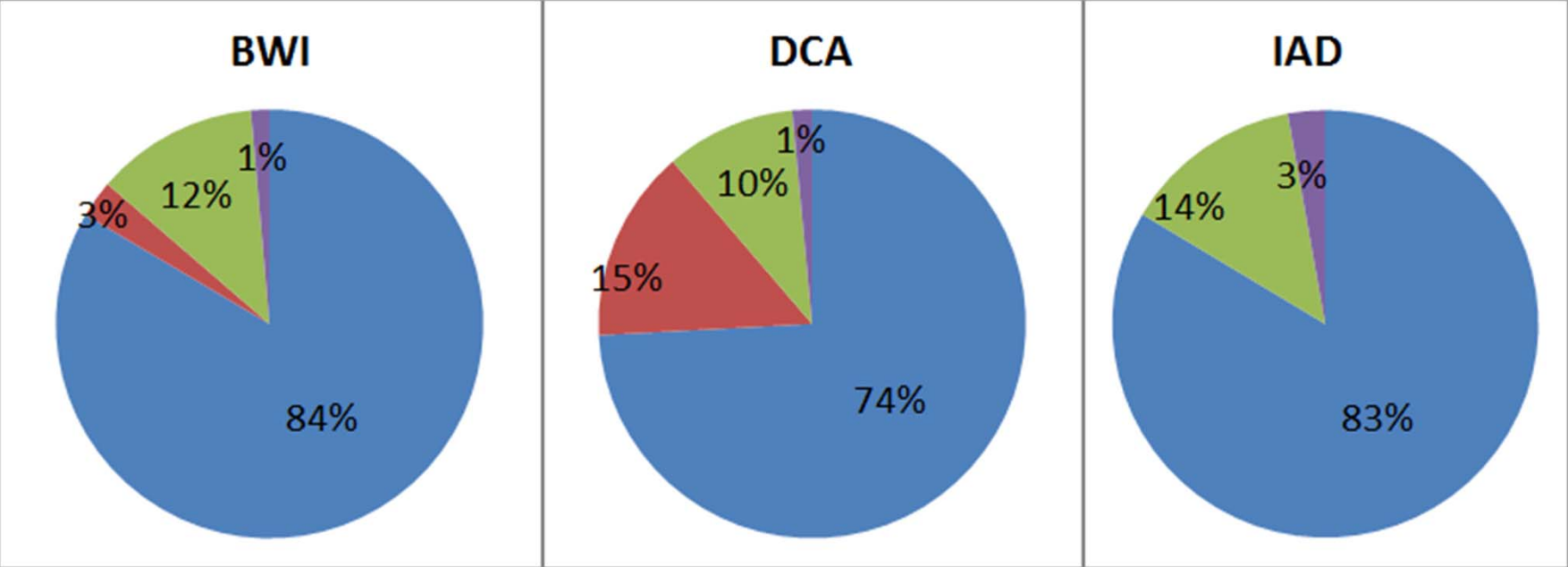
■ Business  
■ Non-Business

*Federal Sequester  
Federal Shutdown*

# Factors Influencing Airport Choice by Trip Purpose (2013 Survey)

	<b>Business</b>	<b>Non-Business</b>	<b>All</b>
Closest airport	59%	53%	55%
Better public ground transportation	2%	3%	3%
Better access roads and parking	3%	3%	3%
More convenient flight times	9%	8%	8%
Only airport with direct flight	7%	6%	6%
Less expensive airfare	10%	19%	16%
Frequent flyer with specific airline	4%	3%	3%
Only airport serving market	3%	2%	2%
Other	3%	3%	3%

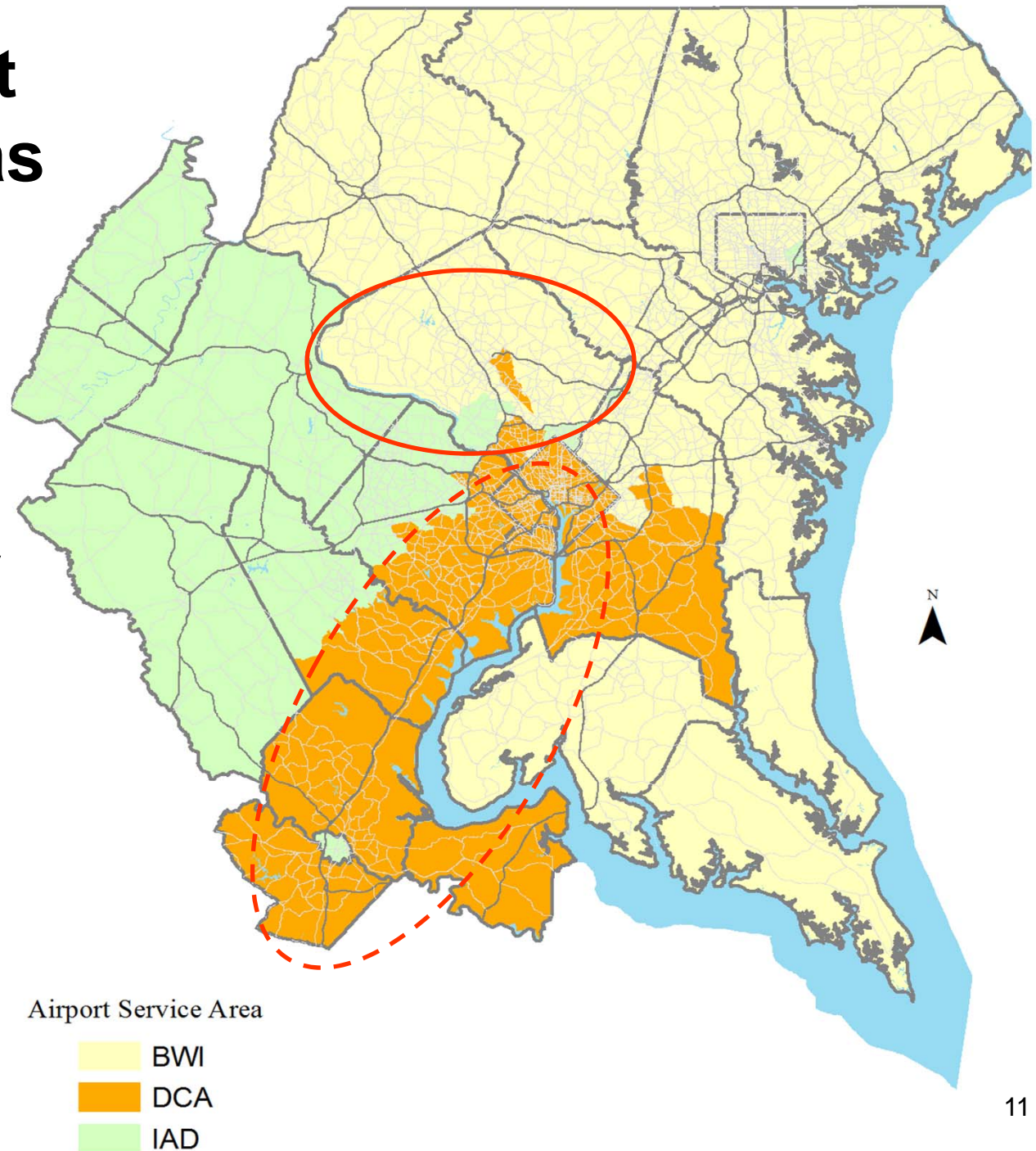
# Locally Originating Airport Trip Mode of Access (2013 Survey)



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

# 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



# A Well-Functioning Airport System Is Vital to Our Region's Economy

## Economic Impact of BWI

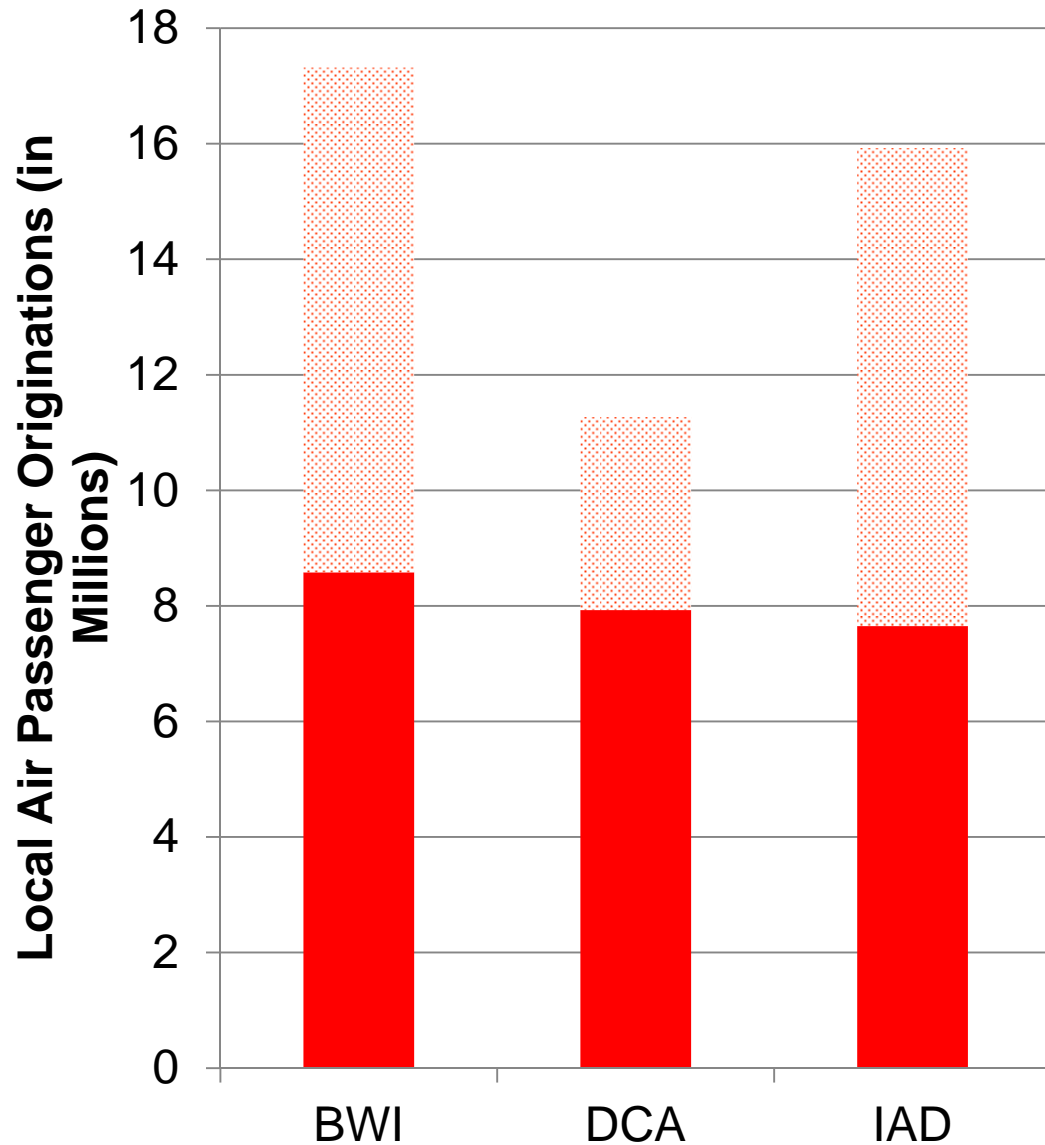
- ▶ \$5.6B in business revenue
- ▶ \$3.6B in personal income
- ▶ \$2.0B in local purchases
- ▶ \$721M in state/local/aviation taxes
- ▶ 93,791 jobs

## 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*

# 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

# Summary

- ▶ Our three commercial airports are a key regional asset vital to the region's economy
- ▶ Regional air passenger enplanements have been flat since 2005, but traffic has been shifting between BWI, DCA, and IAD
- ▶ Our airports have made significant investments to direct and support the majority of future growth in air passengers at BWI and IAD
- ▶ A well-functioning and balanced three airport regional system in the Washington-Baltimore area ensures the safe and efficient movement of air passengers to and from our region