

TPB Technical Committee
October 5, 2012
Agenda Item #8

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

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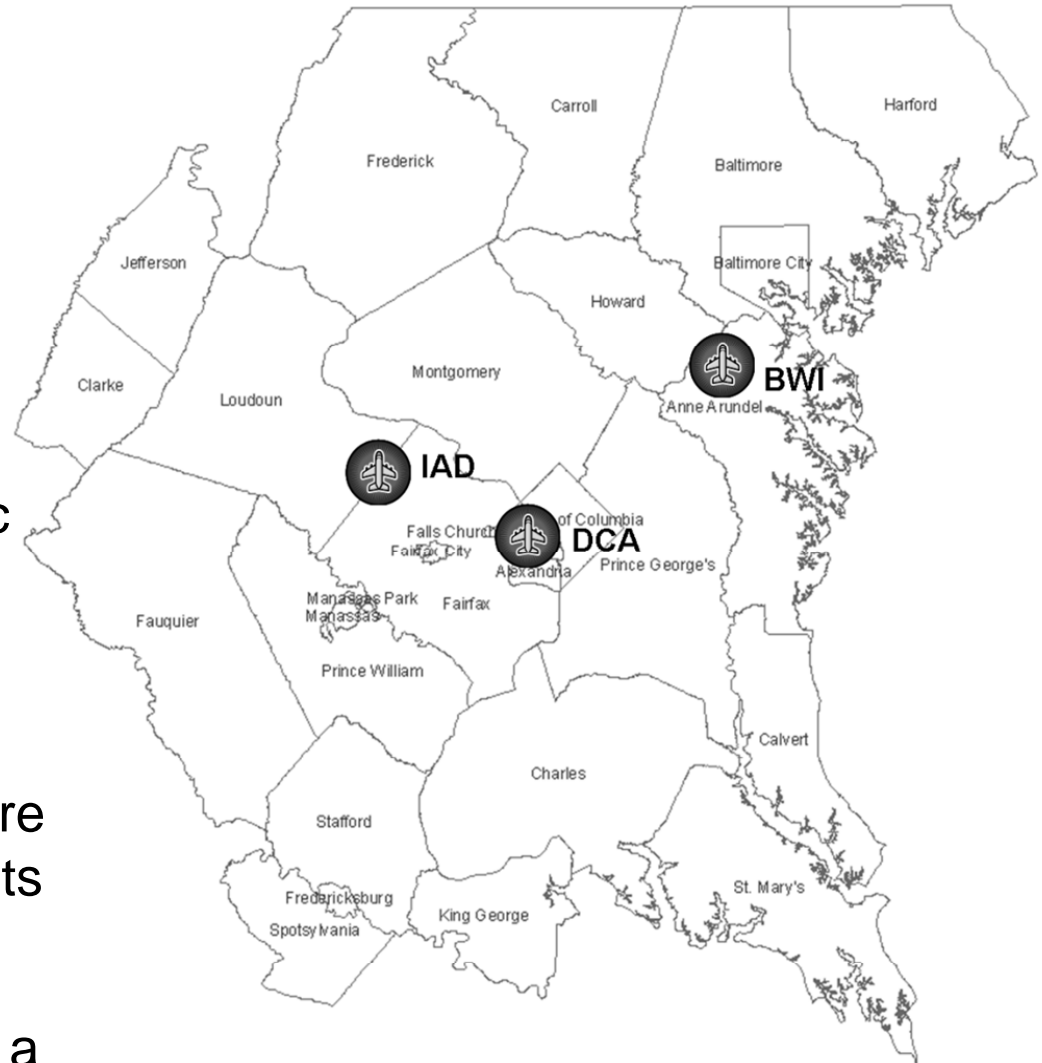
Richard I. Roisman, AICP
Continuous Airport System Planning (CASP) Program Manager

Presentation Overview

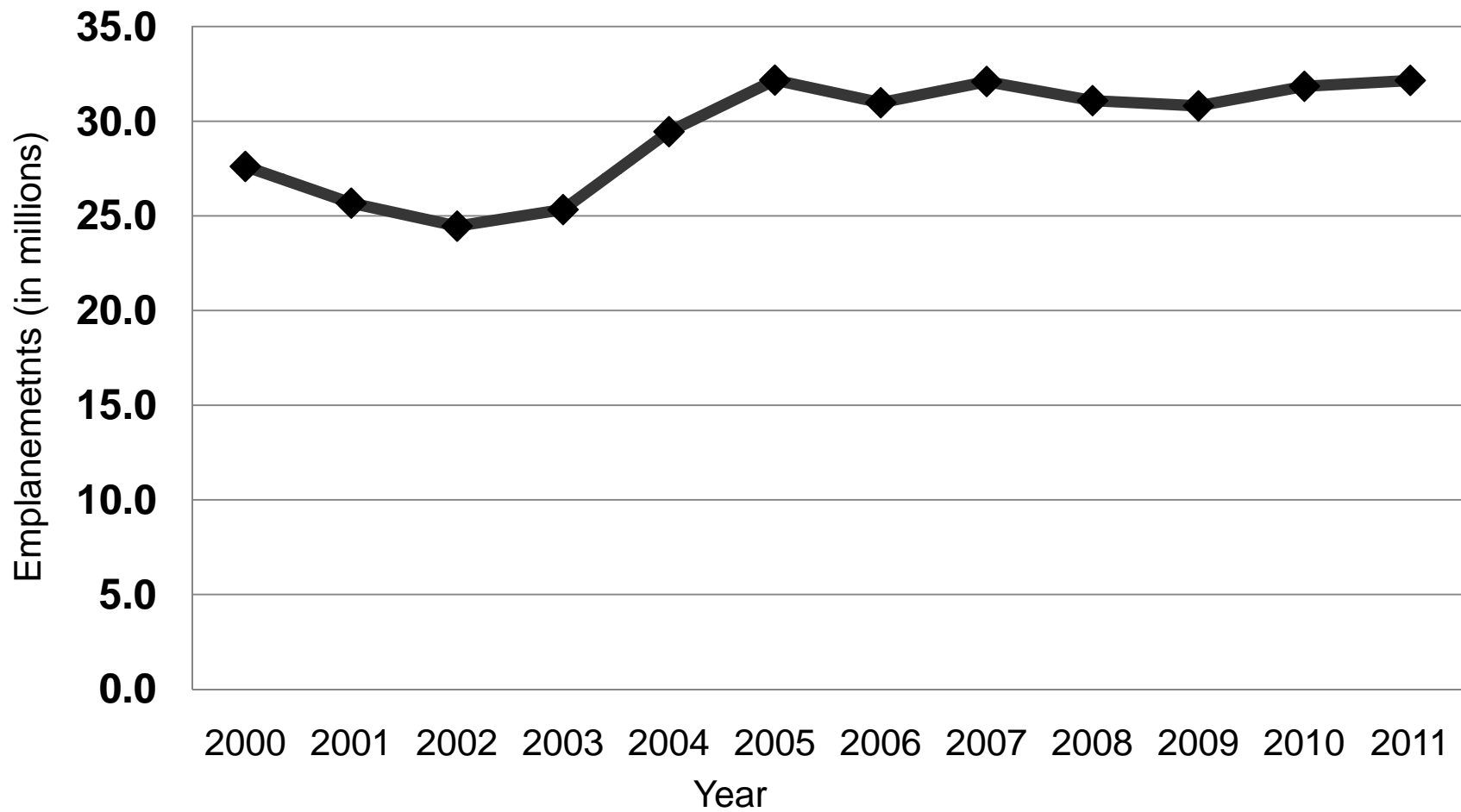
- ▶ Survey Overview
- ▶ Major Findings
- ▶ Issues for the Future

Regional Air Passenger Survey Overview

- ▶ Provides current data to support planning for airport facilities and services
- ▶ Survey is conducted every two years at region's three major commercial airports
- ▶ Random sample of 684 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 complete and return a survey questionnaire

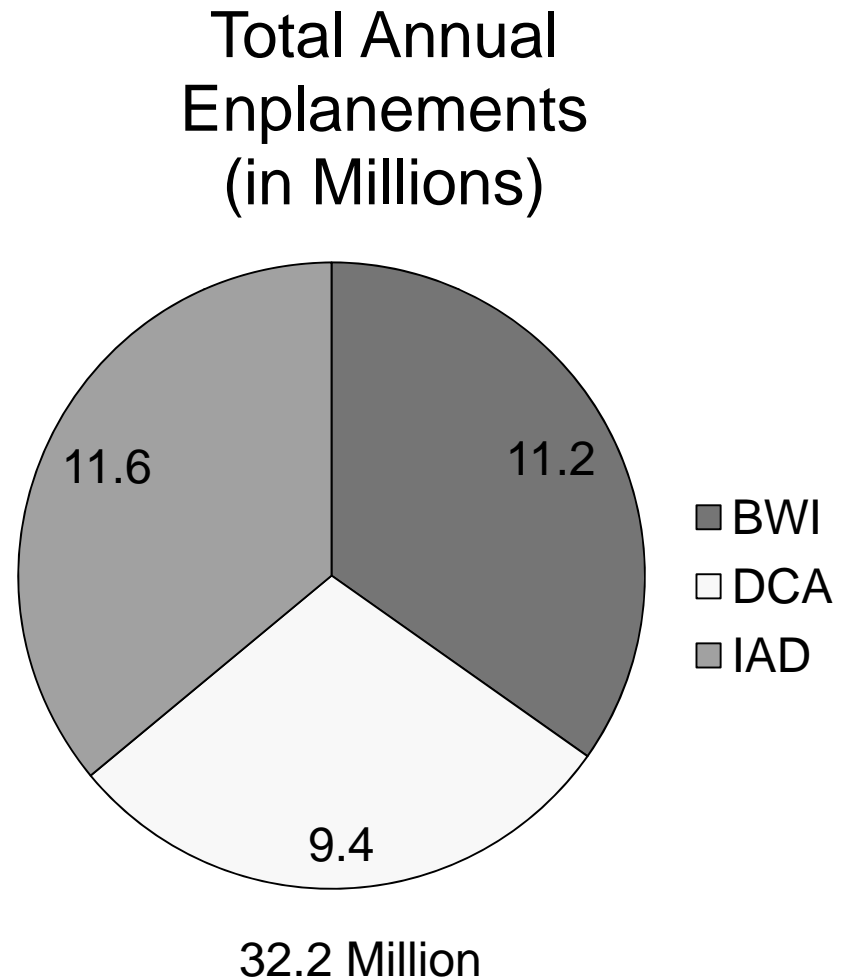


Regional Air Passenger Enplanements Trend (2000 – 2011)



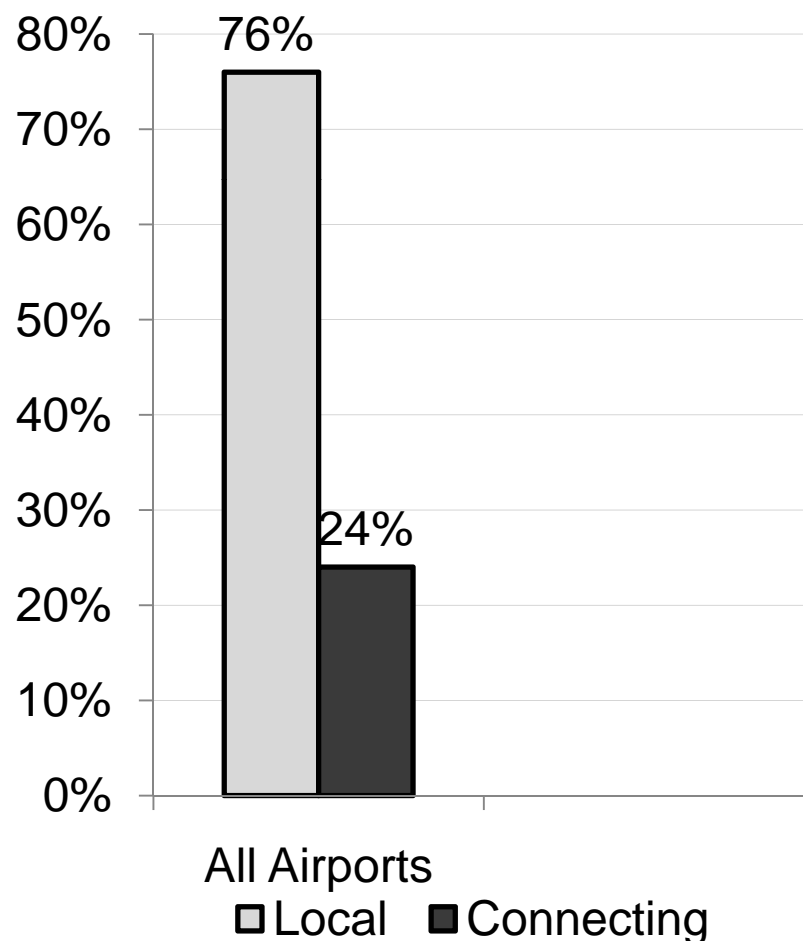
Airport Use in 2011

- ▶ More than 32 million air passengers boarded flights at the region's major commercial airports in 2011
- ▶ 36% boarded a flight at Washington-Dulles International Airport (IAD)
- ▶ 35% boarded a flight at Baltimore-Washington International Thurgood Marshall Airport (BWI)
- ▶ 29% boarded a flight at Ronald Reagan Washington National Airport (DCA)



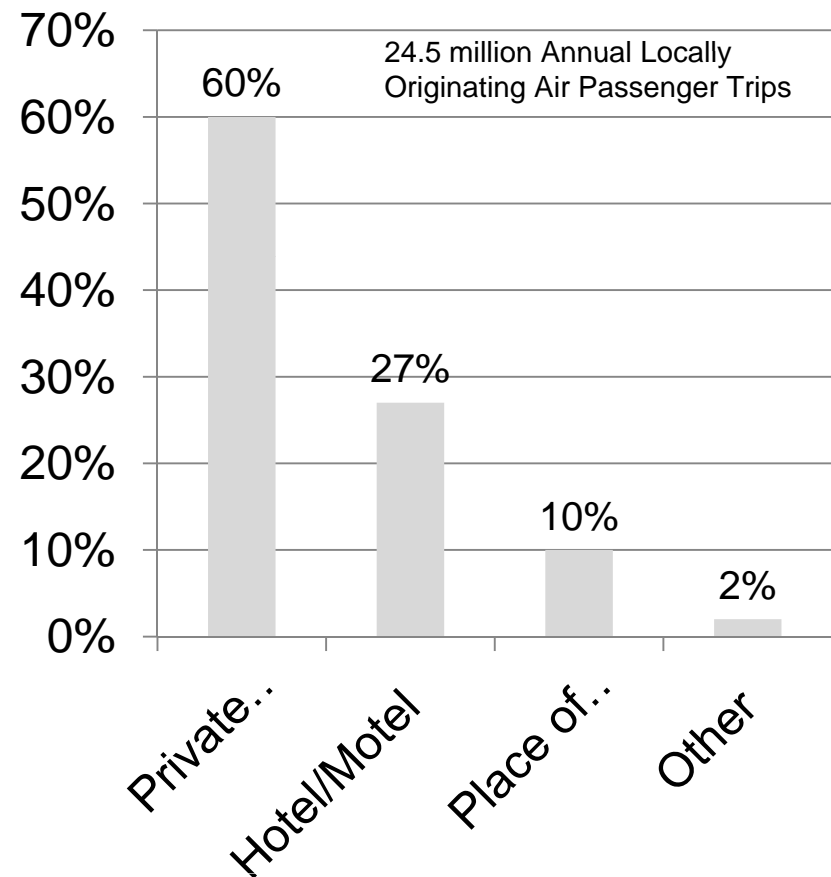
Locally Originating vs. Connecting Passengers

- ▶ More than three-quarters of the enplanements at the region's airports are by locally originating air passengers
- ▶ The other one-quarter of regional enplanements are air passengers connecting to another flight
- ▶ Connecting passengers account for 35% of IAD enplanements
- ▶ Connecting passengers account for 22% of BWI enplanements
- ▶ Connecting passengers account for 12% of DCA enplanements



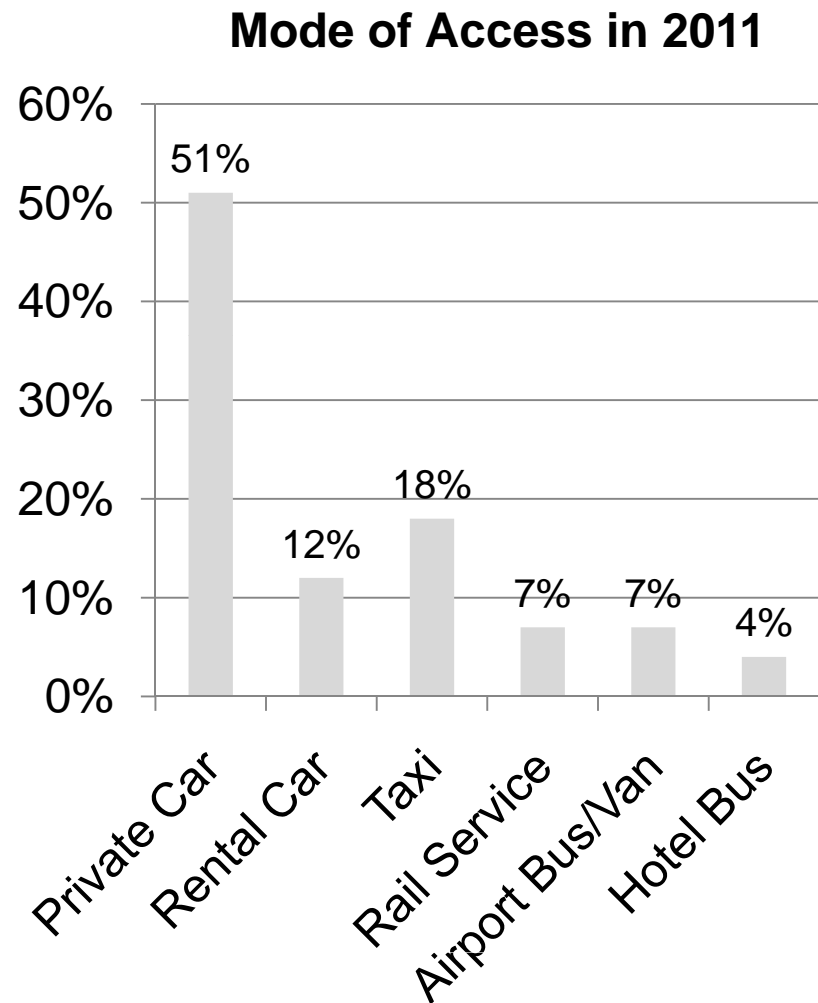
Trip Origins of Locally Originating Air Passengers

- ▶ Regionally, 60% of locally originating trips to the airport begin at a private residence
- ▶ About two-thirds of the locally originating air passenger trips to BWI and IAD begin at a private residence. Only half of the locally originating trips to DCA begin at a private residence
- ▶ 33% of the airport trips to DCA, 26% of the trips to IAD and 21% of the trips to BWI begin at hotel or motel
- ▶ 14% of the airport trips to DCA, 8% of the trips to IAD and 10% of the trips to BWI begin at hotel or motel



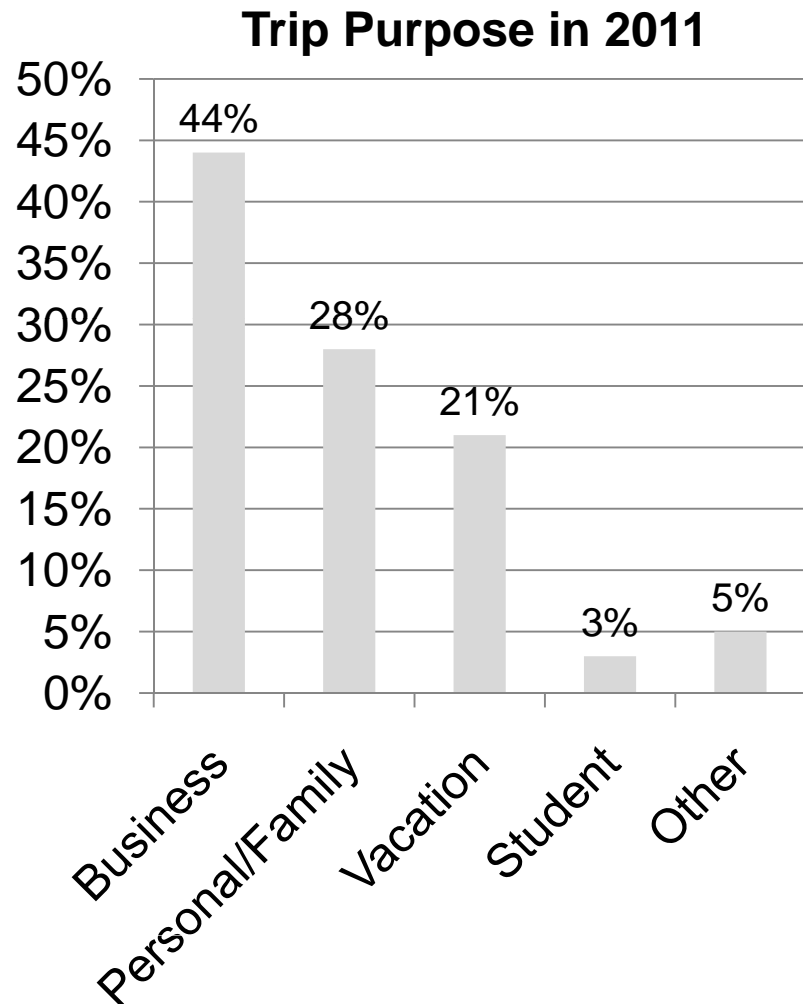
Air Passenger Mode of Travel to Airport

- ▶ Regionally, 61% of air passengers use private or rental cars to get to the airport
- ▶ Usage of private and rental cars is 78% at BWI, 68% at IAD and 43% at DCA
- ▶ Taxis are used by 31% of air passengers at DCA, 17% at IAD and 6% at BWI
- ▶ 16% of DCA air passengers reach the airport by Metrorail (among highest in the nation)
- ▶ 2% of BWI air passengers reach the airport by MARC/AMTRAK service



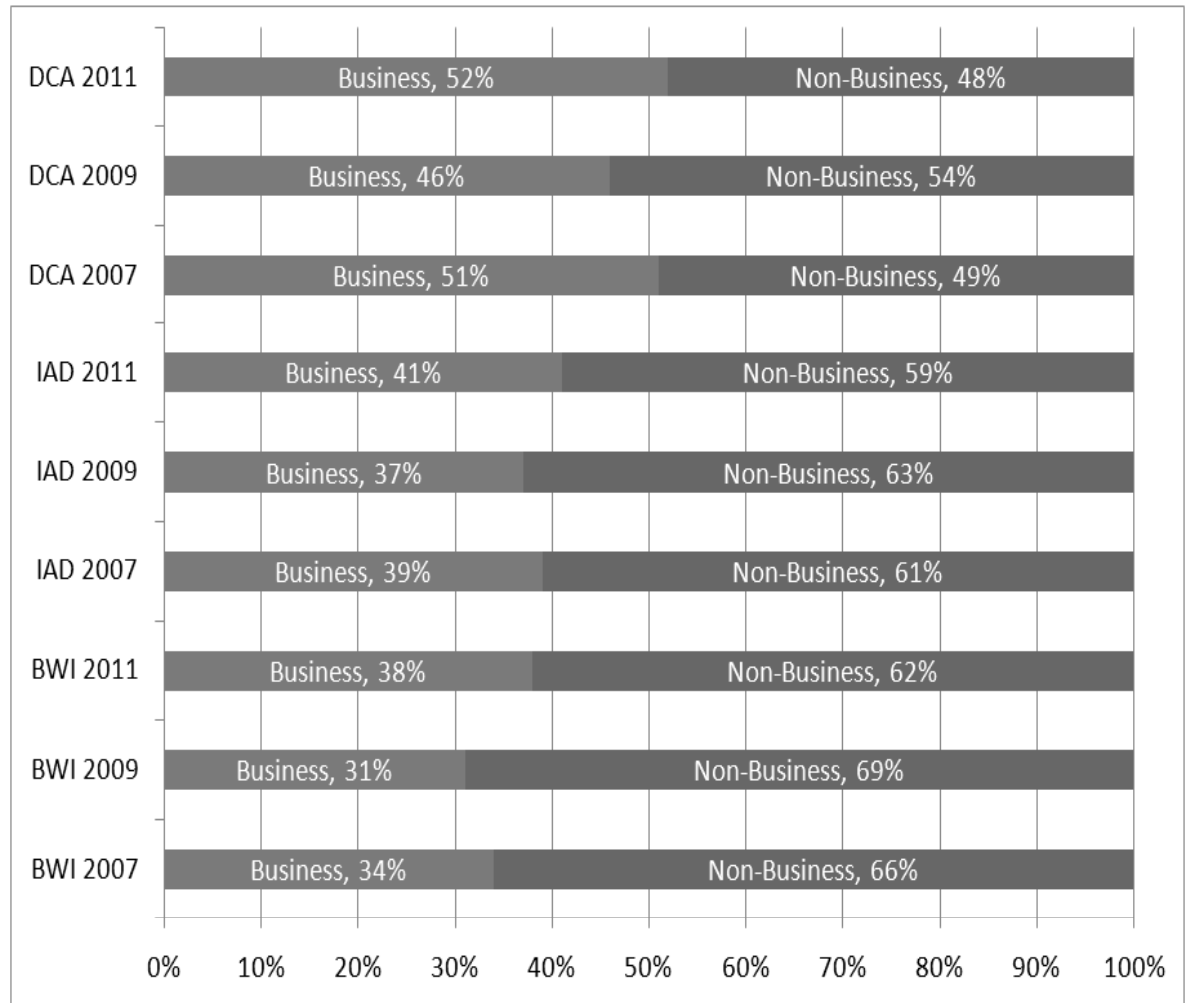
Air Passenger Trip Purposes

- ▶ In 2011, 44% of the air passengers were traveling for business purposes. This is up significantly from 2009, when only 38% of the air passengers' trips were for business purposes
- ▶ Government-related business trips increased from 18% to 20%
- ▶ Non-government related business trips increased from 20% to 24%
- ▶ Vacation trips decreased from 24% to 21% and school-related student trips decreased from 5% to 3%



Trip Purpose By Airport by Year

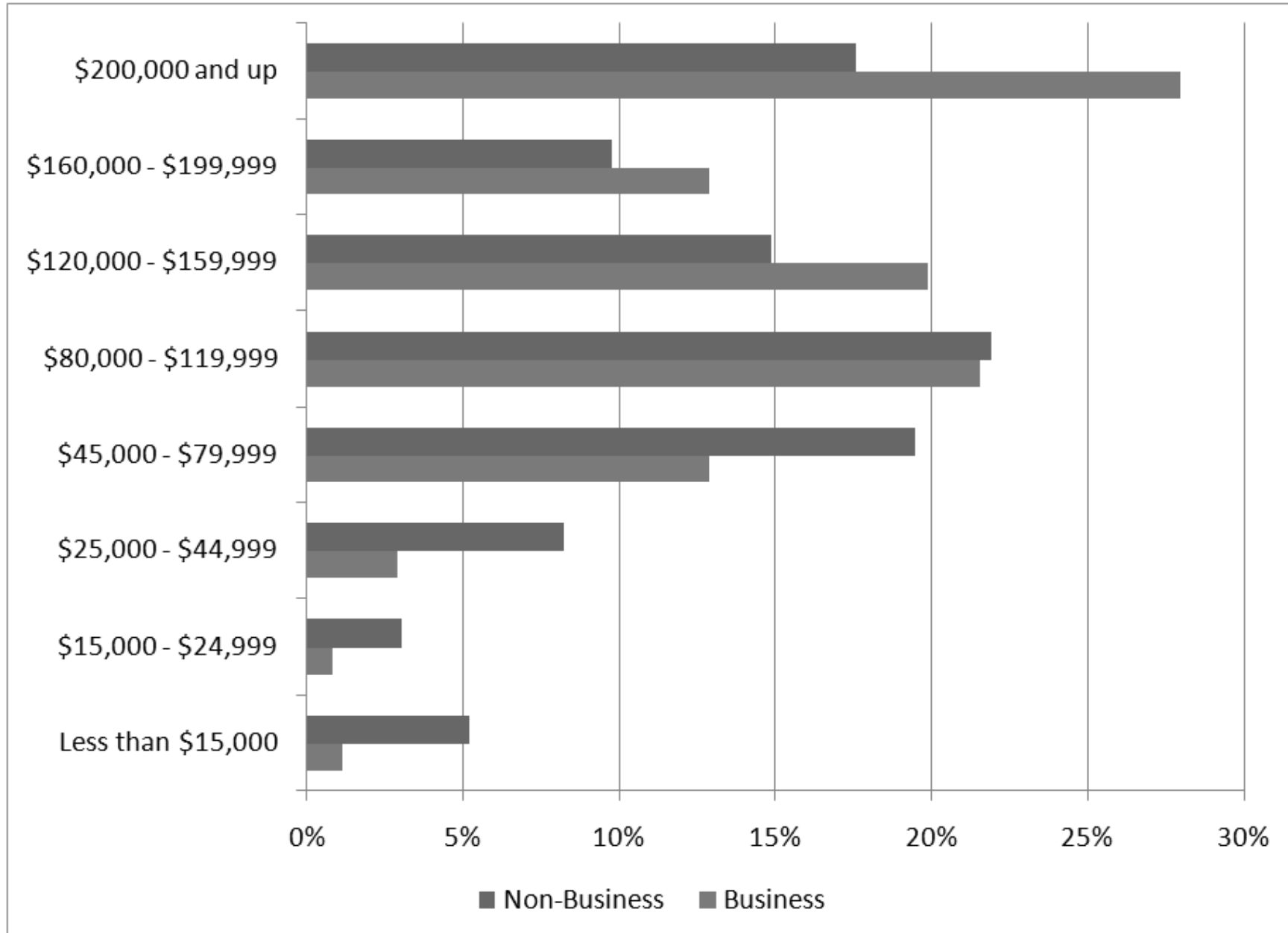
- ▶ Air passenger trips for business purposes increased significantly at all three airports between 2009 and 2011
- ▶ Over half the air passenger trips at DCA were for business purposes, 41% of the trips at IAD and 38% of the trips at BWI were for business purposes



Factors Influencing Airport Choice by Trip Purpose

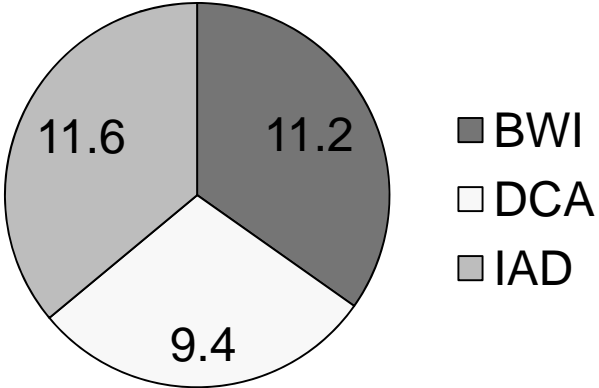
	Business	Non-Business	All
Accessibility			
Closest airport	62%	55%	58%
Better public ground transportation	2%	2%	2%
Better access roads and parking	2%	3%	2%
Accessibility Subtotal:	66%	60%	62%
Airline Service Attributes			
More convenient flight times	7%	6%	7%
Only airport with direct flight	7%	6%	7%
Less expensive airfare	9%	19%	14%
Frequent flyer with specific airline	3%	3%	3%
Only airport serving market	2%	2%	2%
Airline Service Subtotal:	28%	36%	33%
Other	5%	4%	4%

Air Traveler Income by Trip Purpose



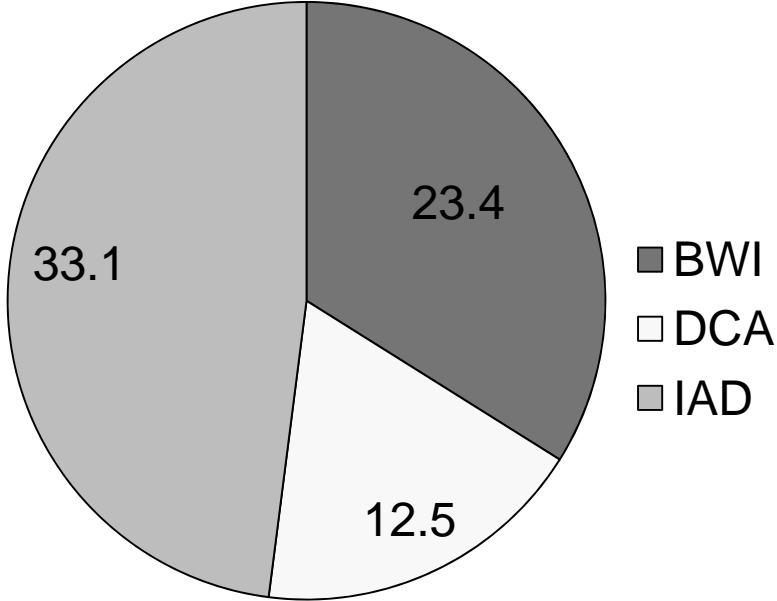
Forecast Increase in Air Passengers

2011



32.2 Million
Air Passengers

2040



69.0 Million
Air Passengers

Issues for the Future

- ▶ Continued growth in domestic and international air travel, especially business travel, is vitally important to the region's economy
- ▶ Business travelers assign very high priority to convenient and quick, reliable ground access between the airport and their local destination in the region
- ▶ Currently, DCA is the airport most preferred by business travelers because of its convenient access to most of the region's commercial centers
- ▶ 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
- ▶ Improving ground access connections between BWI and IAD and the region's major regional activity centers will be very important to the region's future economic growth and prosperity

Regional Air Passenger Survey: Next Steps

- ▶ 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