

WASHINGTON-BALTIMORE REGIONAL AIR PASSENGER SURVEY 2017

Draft General Findings

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Map of Air Systems Region



Key Takeaways

- **657 Surveyed Flights:** 582 Domestic, 75 International
- **Response Rate Decline:** 27.4% in 2017, down from 33% in 2015
- **TNC Mode Share Increase:** Taxis & TNCs reversed share of use
- **Dominant Travel Purpose by Airport**
 - Business: DCA
 - Personal or Family: BWI
 - Vacation: IAD



Flight Sample by Strata and Destination

Airport	Domestic		International		Total	
	Strata	Flights	Strata	Flights	Strata	Flights
BWI	96	223	7	13	103	236
DCA	96	222	5	9	101	231
IAD	85	137	42	53	127	190
Total	277	582	54	75	331	657

Strata were developed based on Origin, Airline, and Destination segmentation (ie: frequency)



Survey Responses: By Type & Rates

Survey Response	BWI	DCA	IAD	Total
At Airport Survey Response	8,668 99.5%	6,235 99.2%	7,335 99.6%	22,238 99.4%
Web Response	37 0.4%	51 0.8%	26 0.4%	114 0.5%
Mailback Response	8 0.1%	1 0.0%	3 0.0%	12 0.1%
Total	8,713 100%	6,287 100%	7,364 100%	22,364 100%
Response Rate	29.0%	26.8%	26.5%	27.4% (Average)



Enplanements

- Annual air passenger enplanements in 2017 were 2.4 million higher (36.5 million) than in 2015 (34.1 million)
- Local origin enplanements increased at all airports compared with 2015
 - BWI: +5%
 - DCA: +1.3%
 - IAD: +10%
- Connections increased substantially at BWI and DCA; decreased at IAD.
 - BWI: + 25%
 - DCA: + 29%
 - IAD: -1.4%



Annual Air Passenger Trip Originations

Enplanement Type		BWI	DCA	IAD	REGION
Local originations (came by ground transportation)	<i>Number</i>	8,910	10,499	7,245	26,653
	<i>Percent</i>	67%	88%	64%	73%
Connected from another flight	<i>Number</i>	4,305	1,458	4,062	9,826
	<i>Percent</i>	33%	12%	36%	27%
Total Enplanements	Number	13,215	11,957	11,307	36,479
Percent of Region		100%	100%	100%	100%

Notes:

*Totals may not add due to rounding

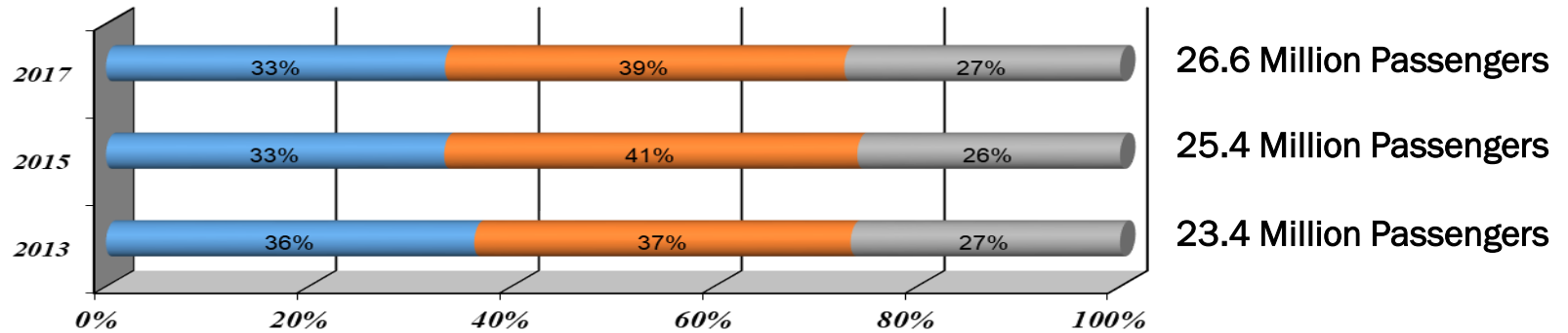
*Numbers are in thousands

*Total Enplanements includes passengers on domestic scheduled, commuter, and international flights

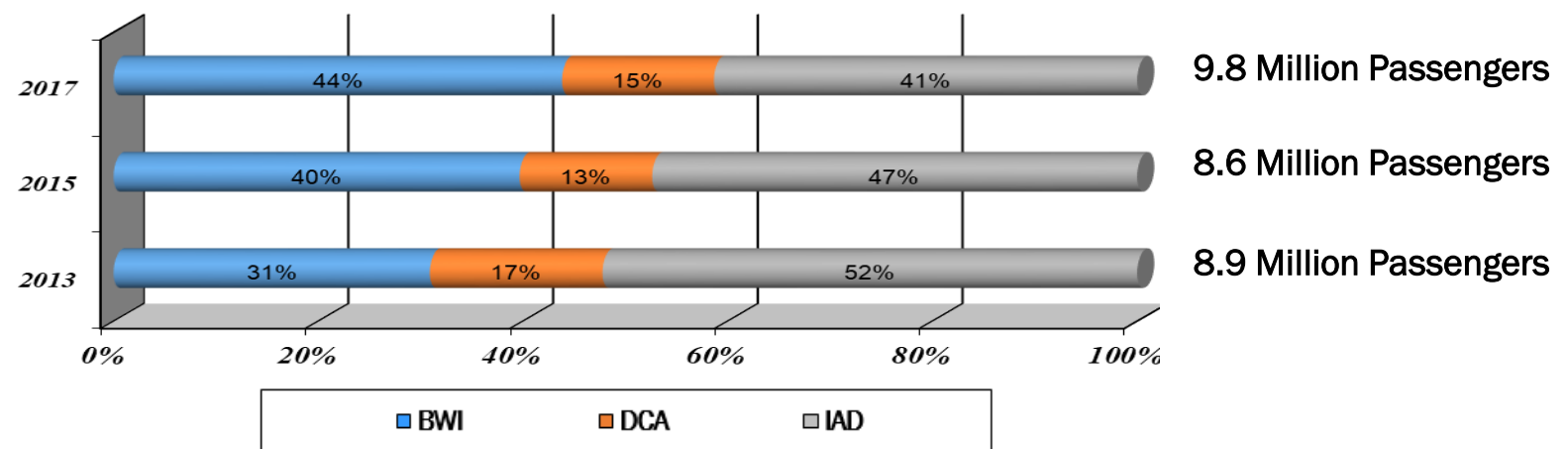


Airport Share of Locally Originating and Connecting Passengers

Local Originating Passengers



Connecting Passengers



Primary Reason for Selecting Airport

Ground Access Considerations

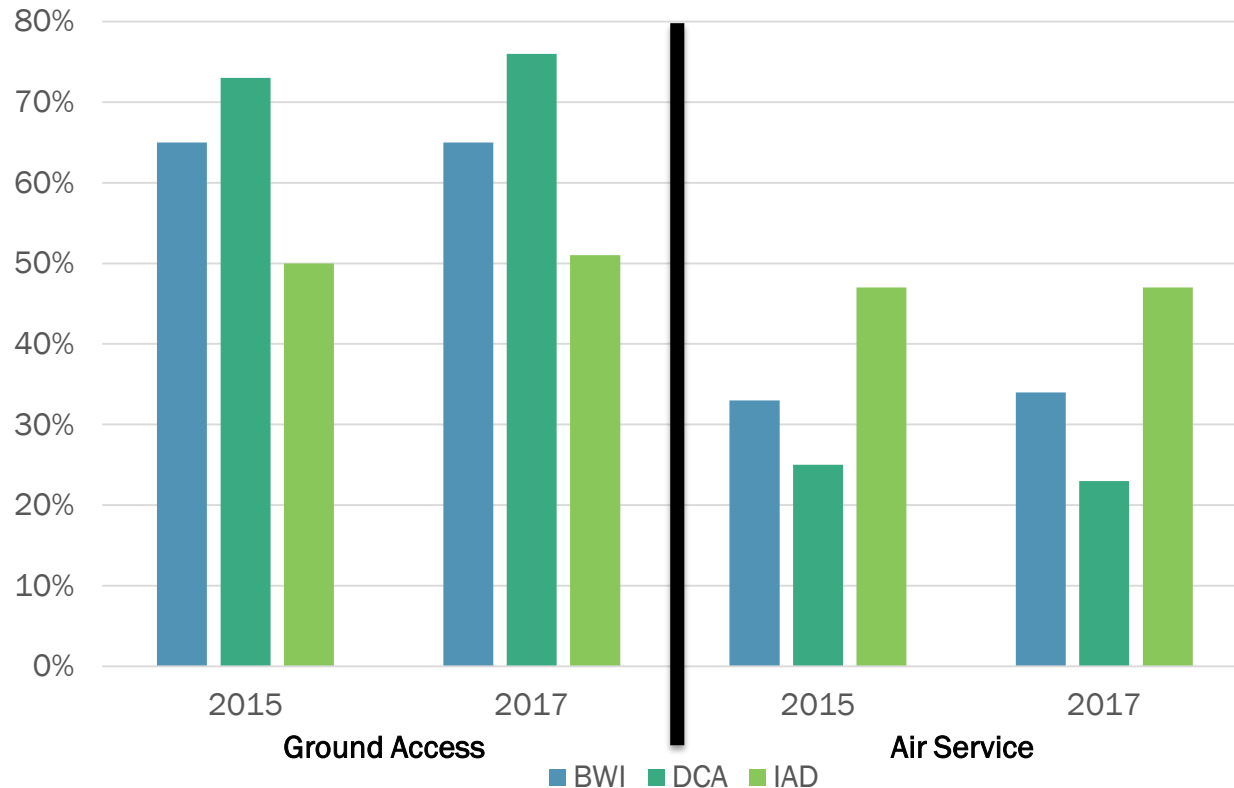
- Closest airport
- Easy Road Access
- Convenient limo, bus, or rail service
- Good parking facilities

Air Service Considerations

- More convenient flight times
- Less expensive airfare
- Only airport with non-stop flights
- Only airport that serves market
- Frequent flyer specific airline



Primary Reason for Selecting Airport Ground Access/Air Service



- **Accessibility reasons remained unchanged with 65% when compared with 2015**

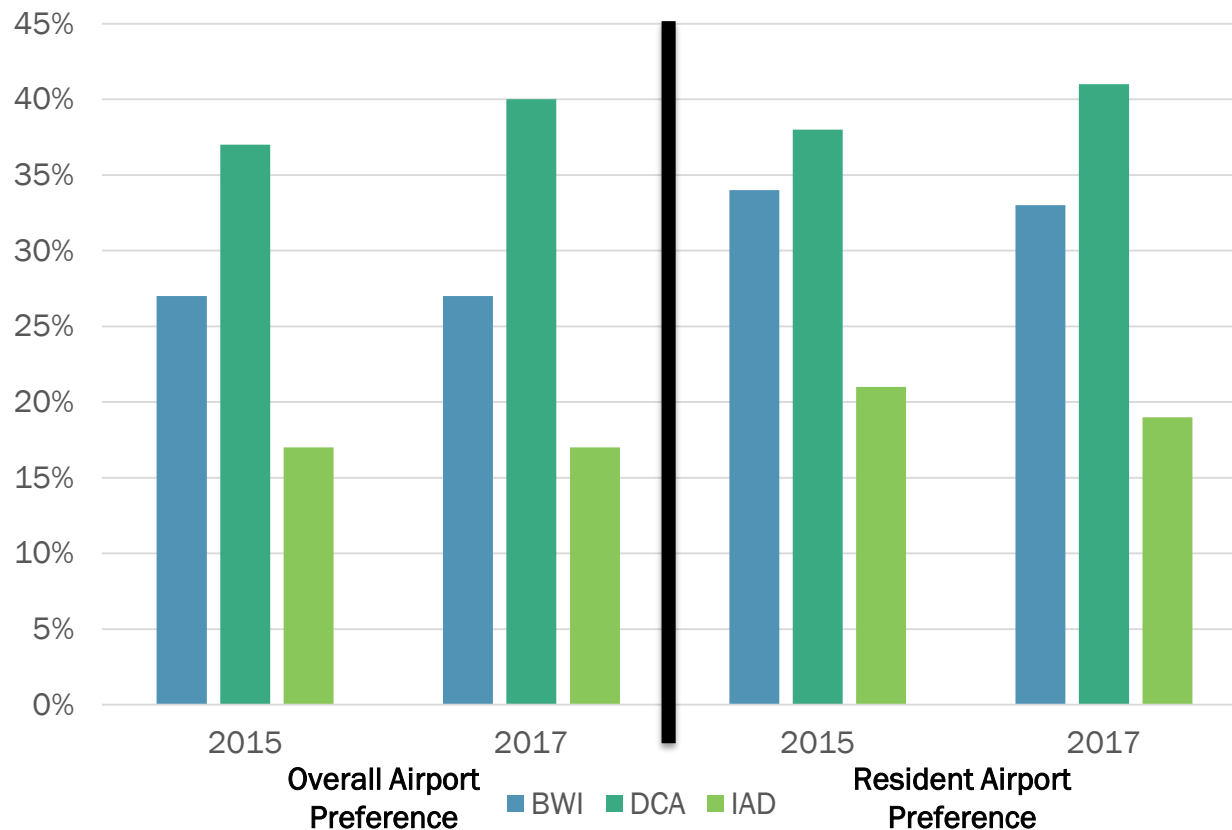


Primary Reason for Selecting Airport

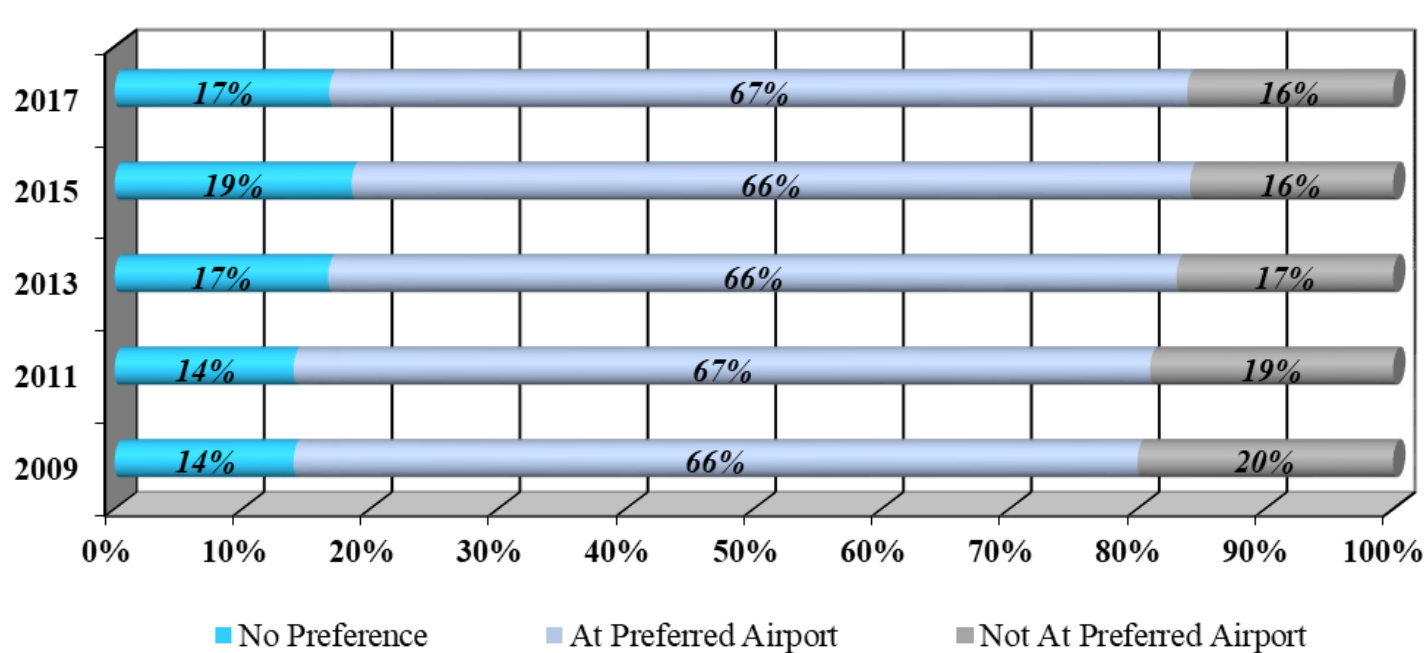
Reason	BWI	DCA	IAD	Region
<i>Accessibility</i>	65%	76%	51%	65%
<i>Quality of Service</i>	15%	15%	31%	19%
<i>Cost of Service</i>	19%	8%	16%	14%
<i>Other</i>	1%	2%	2%	2%
Total	100%	100%	100%	100%



Airport Preference Comparison, Total/Resident



Airport Preference (originating passengers)



Trip Purpose

Business

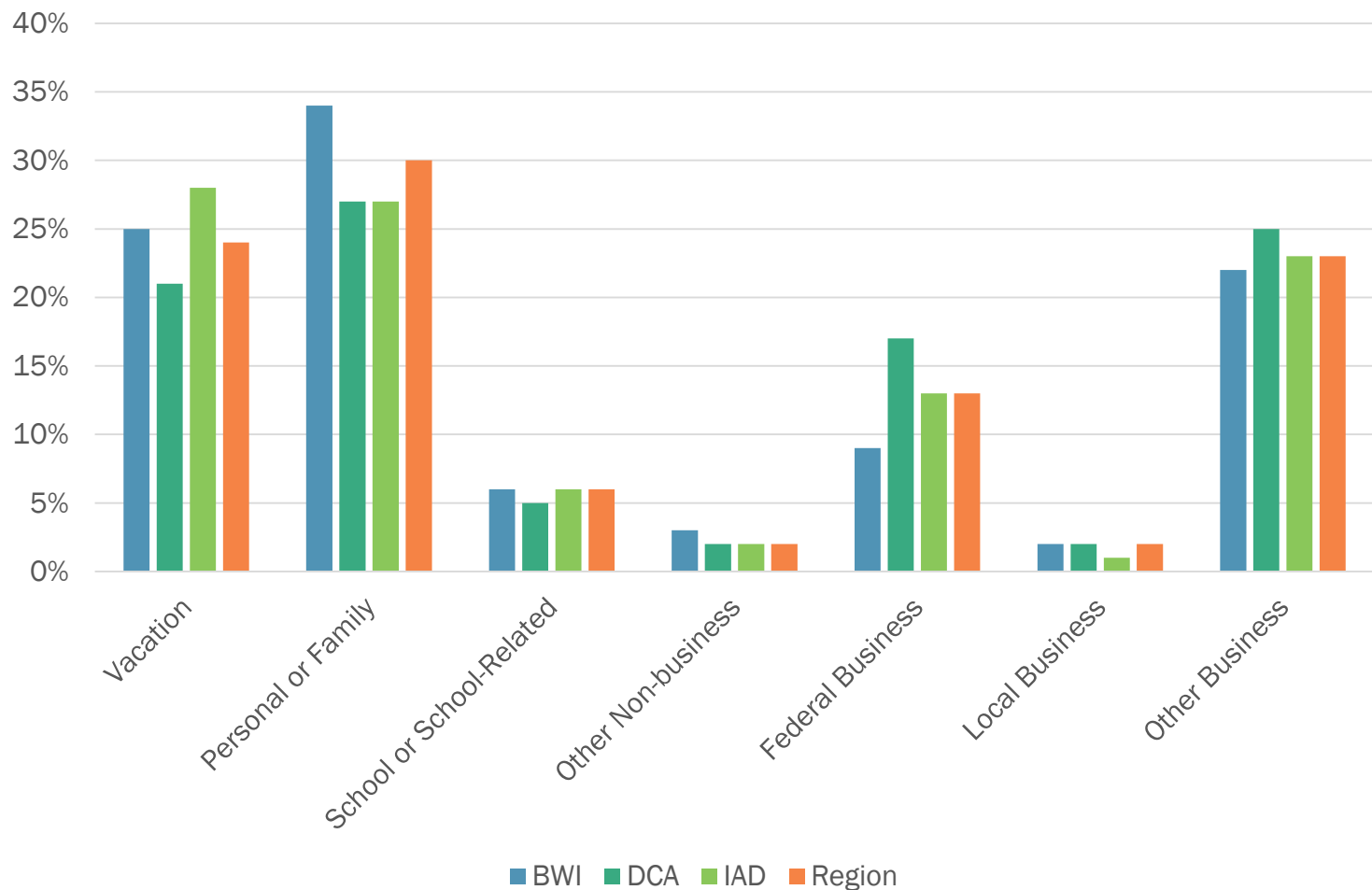
- Related to government (*includes Federal, State and Local*)
- Other non-government related

Non-Business

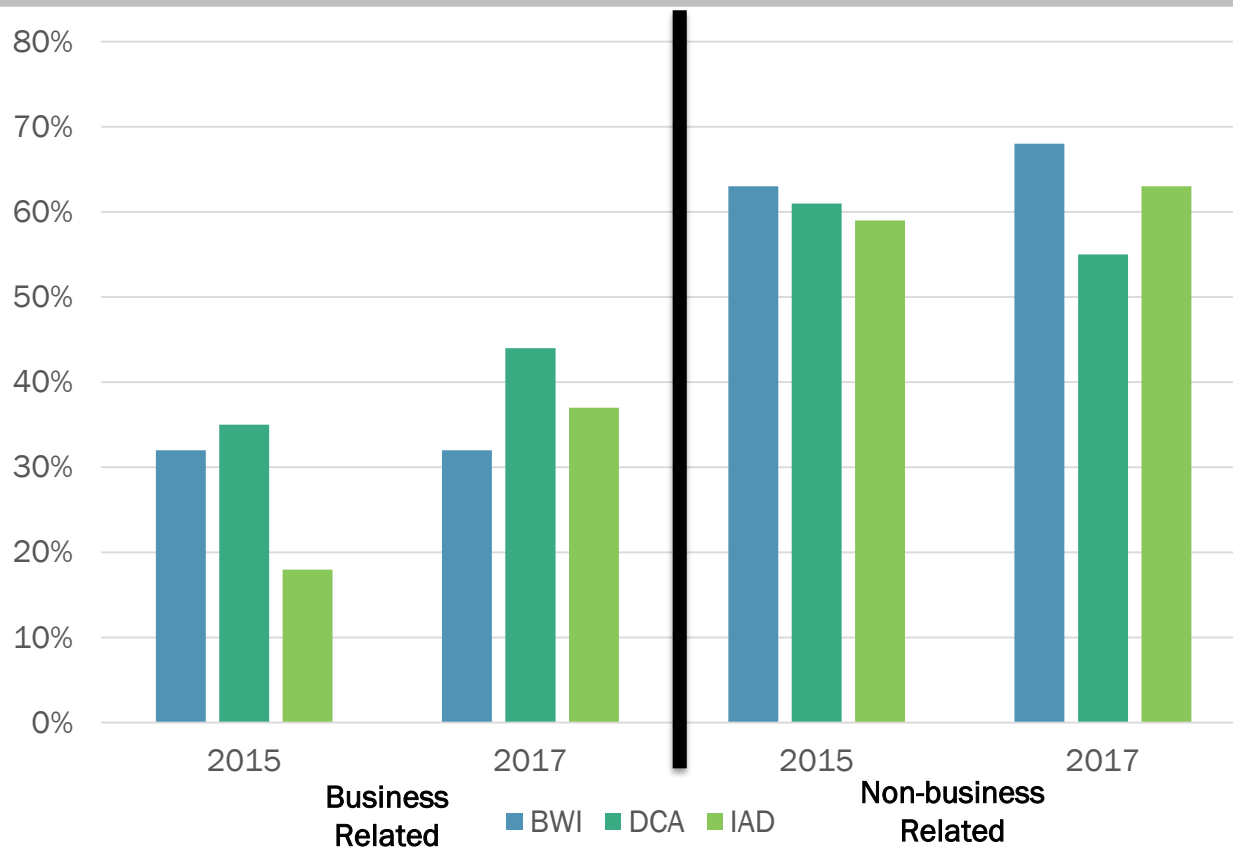
- Vacation
- Personal or family affairs
- Student or school related
- Other



Annual Originating Air Passengers by Trip Purpose (2017)



Trip Purpose Comparison, Business Related/Non-business Related



- Business related trip purpose overall increased by 9% while non-business related trips increased by 1% between 2015 and 2017



Trip Origin

Home

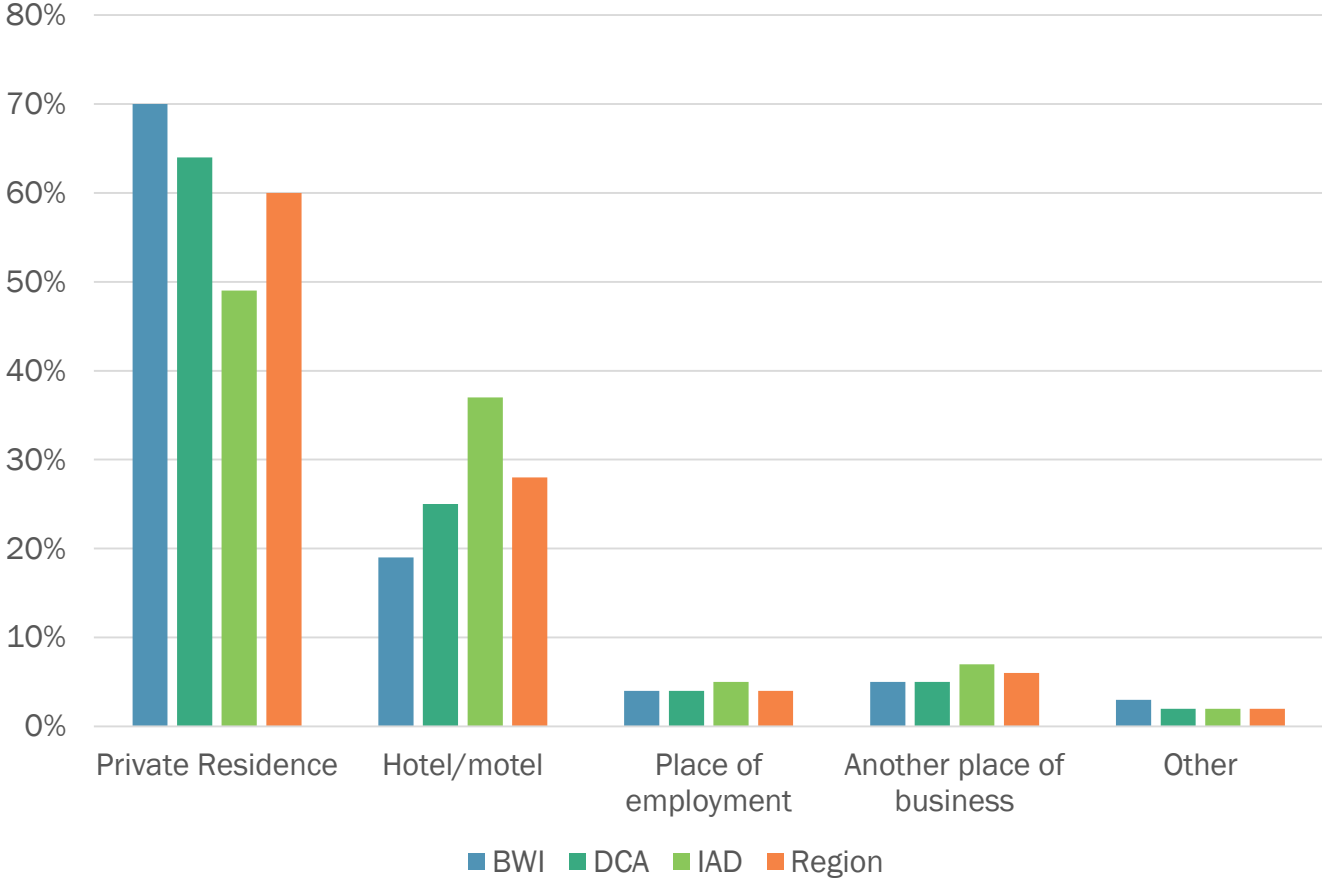
- Private residence

Non-home

- Hotel/Motel
- Place of employment (work)
- Another place of business
- Other



Annual Originating Air Passengers by Ground Trip Origin (2017)



Washington-Baltimore Regional Air Passenger Survey: Findings

Mode of Travel to Airport

- Private car
- Rental Car
- Taxi
- [Transportation Network \(Uber, Lyft, \)](#)
- Metrorail (DCA)
- Rail Service (MARC, VRE)
- Light Rail (BWI)
- Airport Bus/Van/Limo
- Hotel/Motel Courtesy Bus
- Metro Bus/MTA Bus
- Other

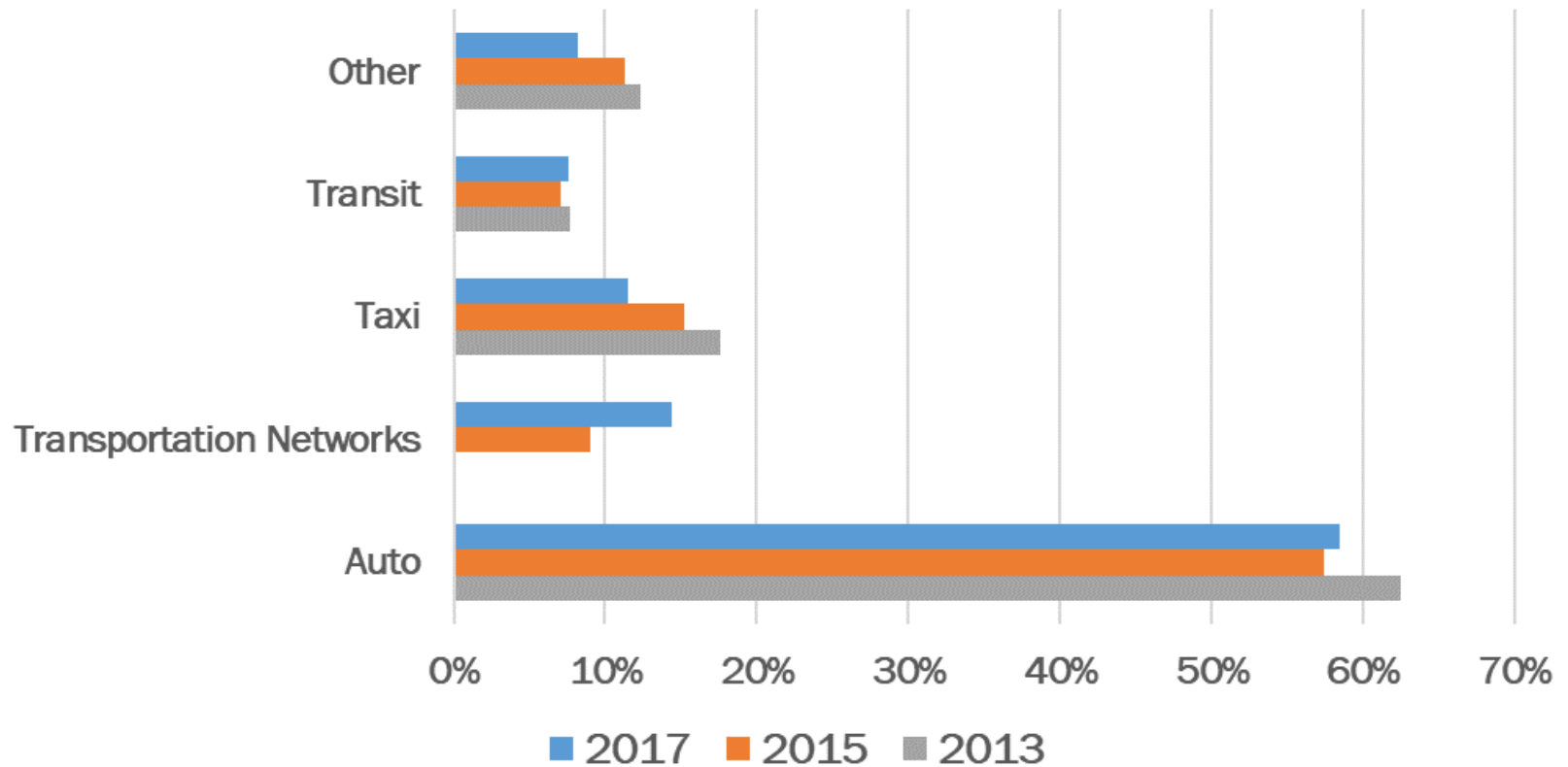


Washington-Baltimore Regional Air Passenger Survey: Findings

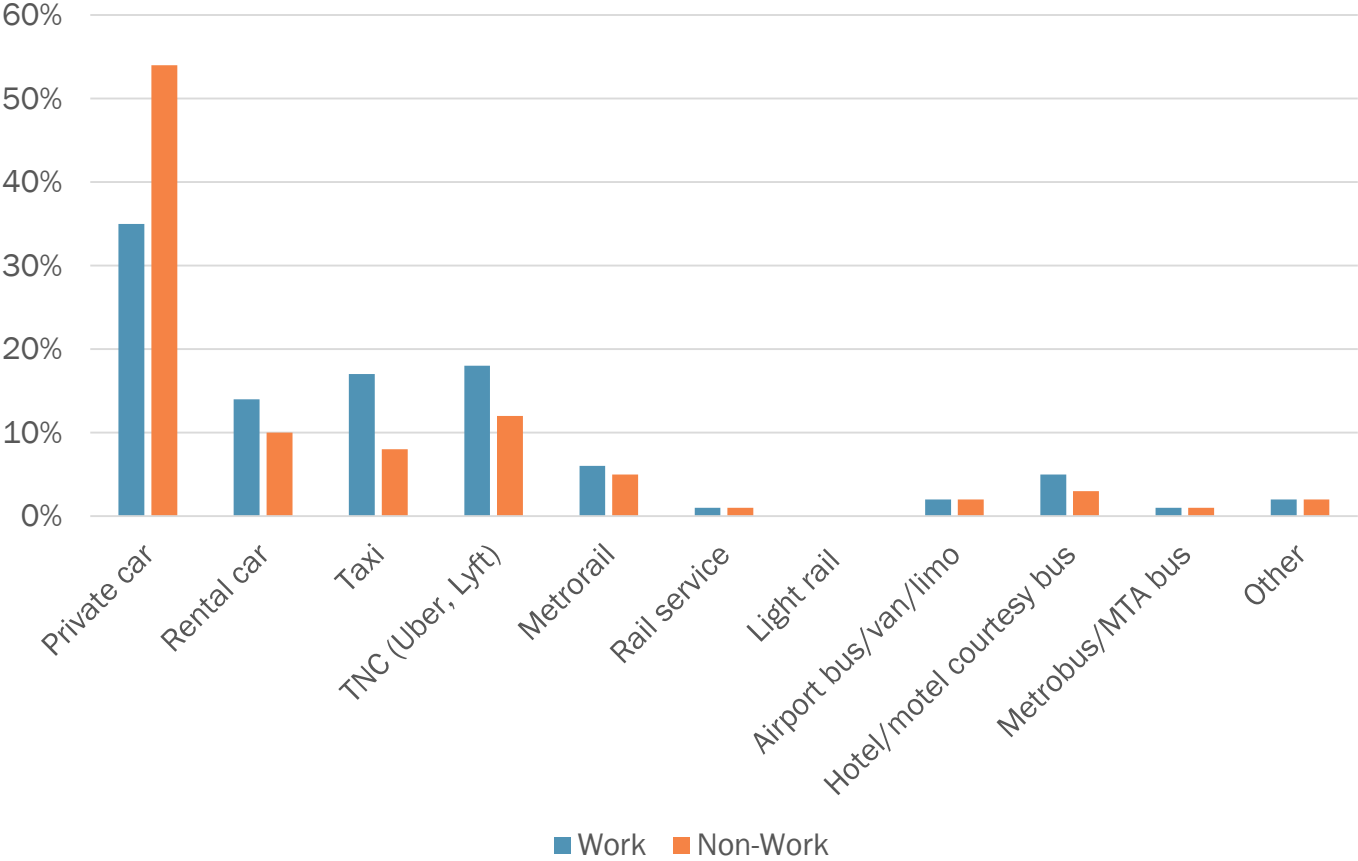
- The most common mode of access to airport continued to be the automobile (private car, rental car, Taxi, transportation networks) accounting for 84% of total trips to all airport.
- Metrorail usage at Reagan National increased to 13% from 12% in 2015
- Air passengers accessing the airport by Transportation Networks accounted for 14% of the total
 - At DCA 21% almost twice than at IAD and 3 times than at BWI
 - Transportation Networks users at DCA accounted for 60% of total
 - The drop of Taxi and rental car trips at DCA could be attributed to Transportation Networks



Originating Passengers by Mode of Access



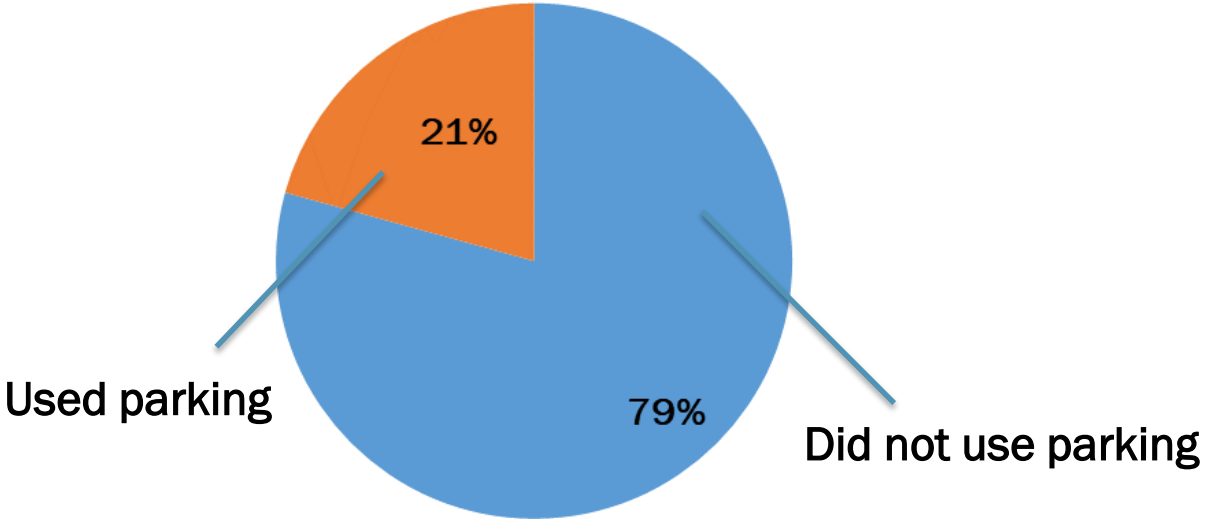
Annual Originating Air Passengers by Mode of Access and Trip Purpose (2017)



Annual Origination Air Passengers by Respondent Use of Parking Facilities

Parking Facility Use		BWI	DCA	IAD	REGION
Used Parking Facility	<i>Number</i>	2,854	961	1,335	5,150
	<i>Percent</i>	35%	10%	21%	21%
Not Parked	<i>Number</i>	5,417	8,858	5,133	19,408
	<i>Percent</i>	65%	90%	79%	79%
TOTAL		8,271	9,819	6,468	24,558

Note 1: Totals do not included non-respondents-- **Note 2:** Numbers are in thousands

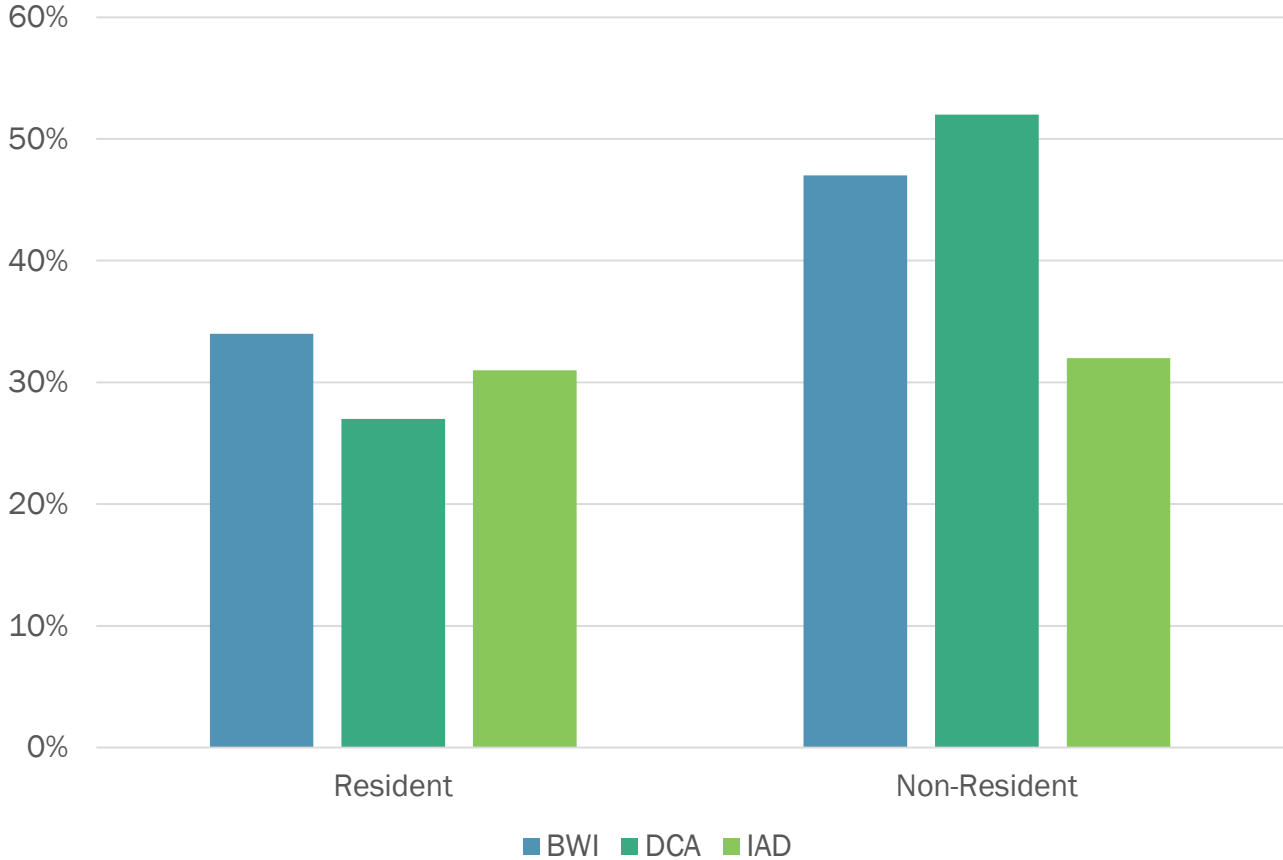


Air Traveler Characteristics

- In 2017, the majority of departing air travelers at the region's three major airports were middle-aged, affluent and non-resident.
- Non-resident departing passengers accounted for 60% of total passengers.
- The share of resident departing passengers increased to 40% in 2017, up from 35% in 2015.
- The share of departing passengers under the age of 25 years and over the age of 65 years remained unchanged at 23% when compared with 2015 findings.



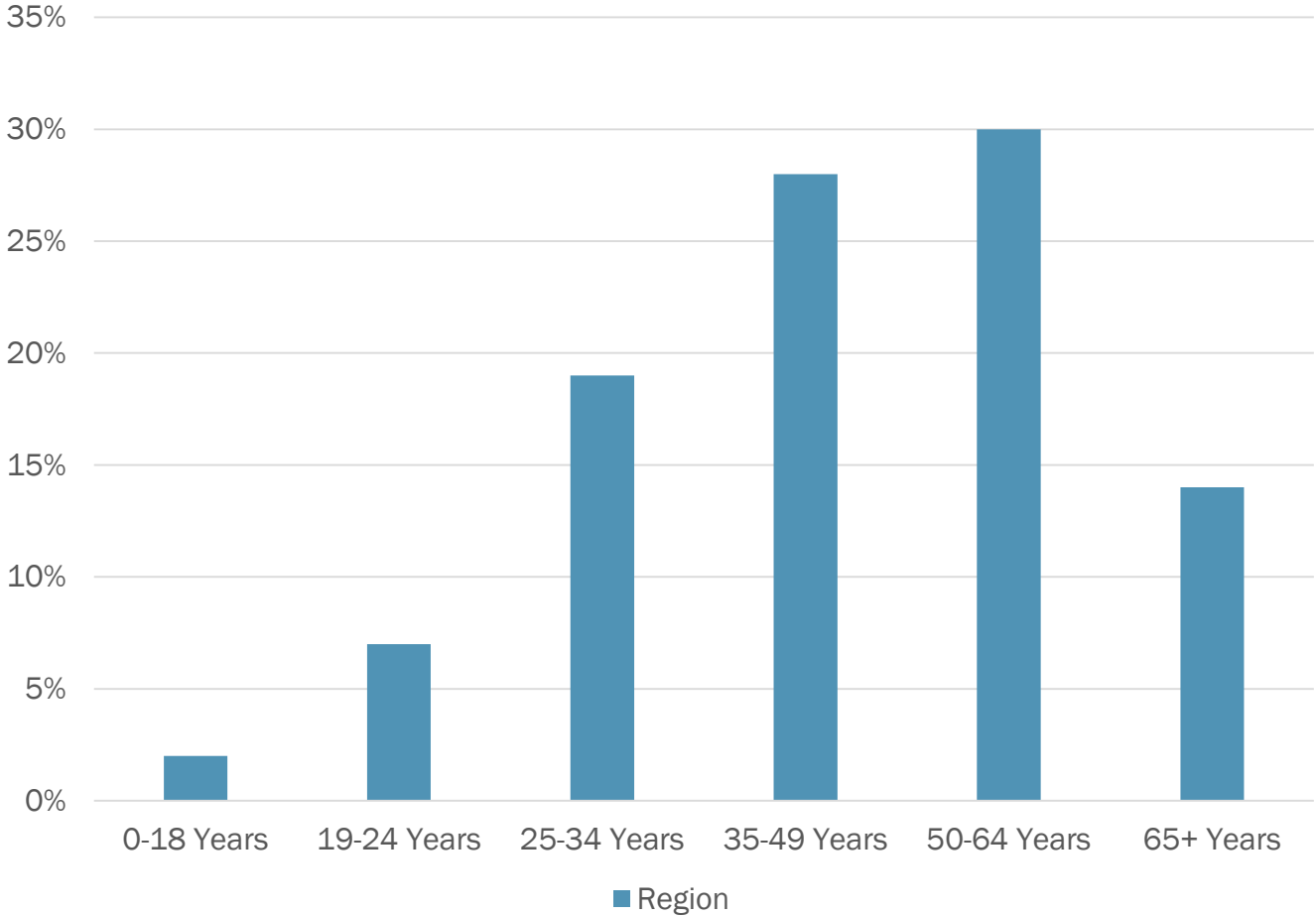
Annual Originating Air Passengers by Resident Status



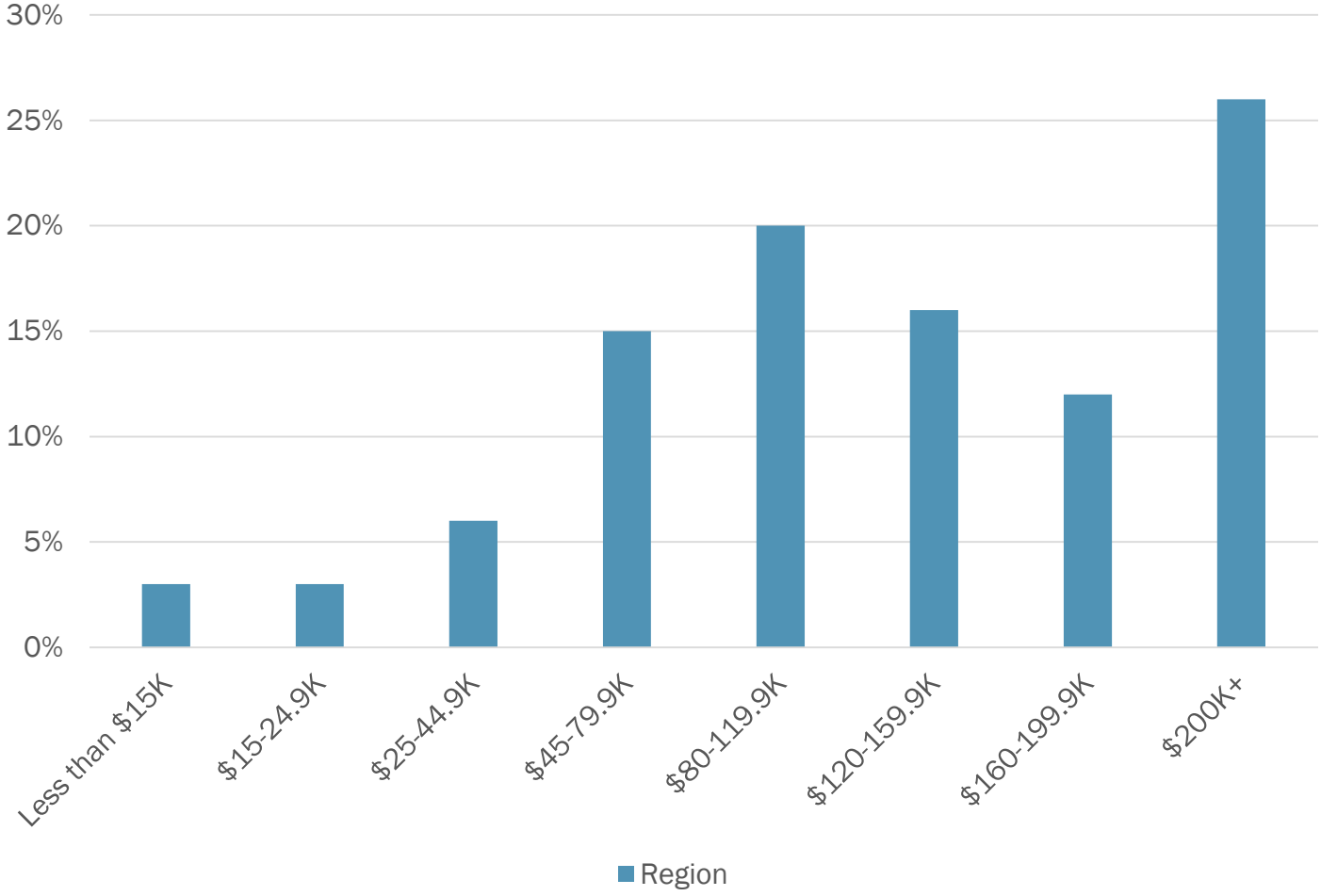
Note 1: “Unknown” not included



Annual Originating Air Passengers by Age



Annual Originating Air Passengers by Income



Next Steps

- Complete logic check
- Compare findings with earlier survey results
- Draft General Findings **Report**: mid-April 2018
- Present General Findings **Report** to Aviation Technical Subcommittee: May 2018
- Final General Findings **Report**: June 2018
- Geo-Coding survey file
- Prepare Geographic Findings Report



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