2015 WASHINGTON-BALTIMORE REGIONAL AIR PASSENGER SURVEY

Geographic Findings

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Transportation Planning Board
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National Capital Region
Transportation Planning Board

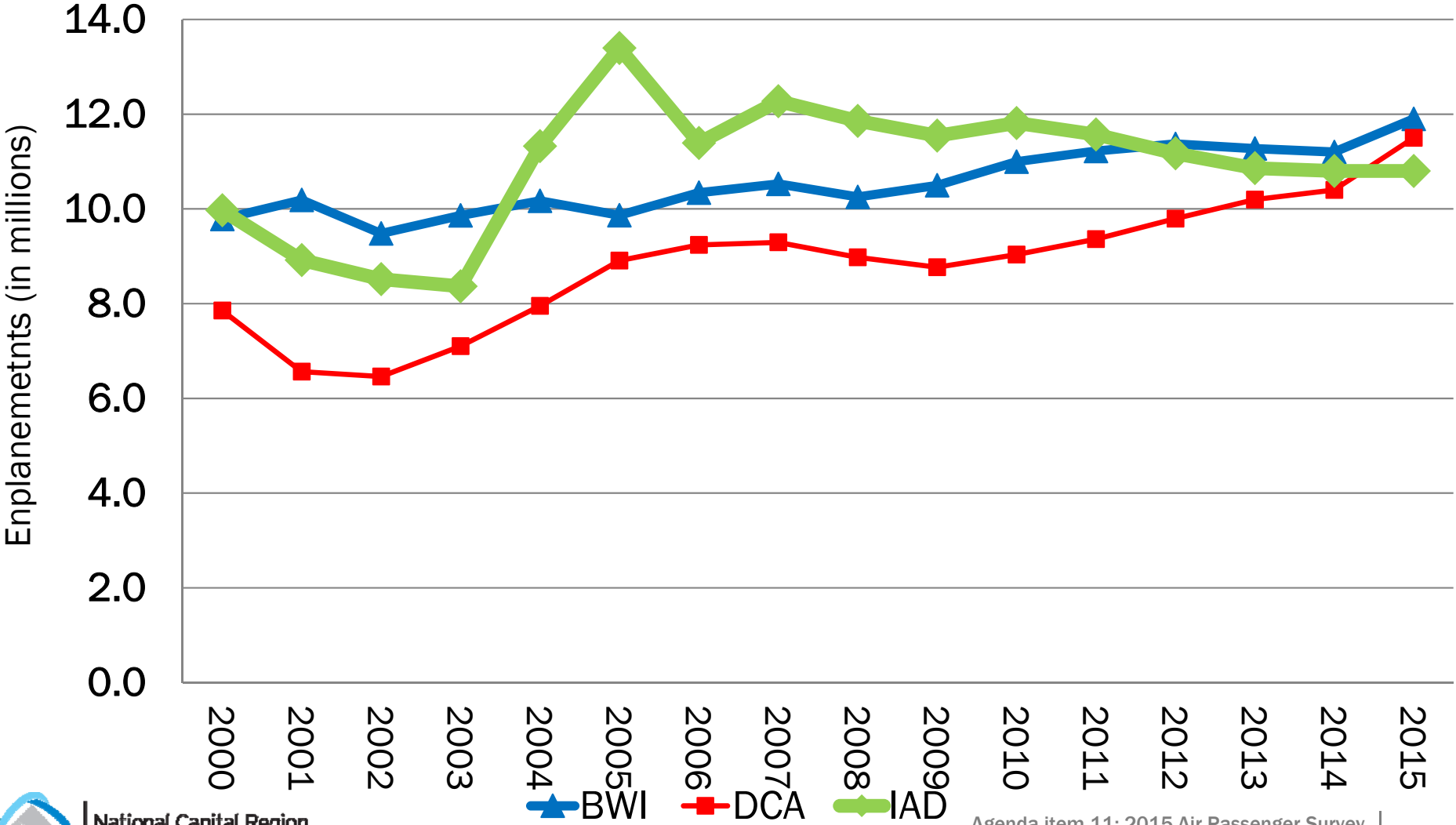# Our Three Commercial Airports are a Key Regional Asset

- Three airports with three distinct markets

- Serve air passengers and air cargo

- Multimodal ground access

- Regional air passenger survey every two years

- TPB Aviation Technical Subcommittee has oversight of the CASP Work Program
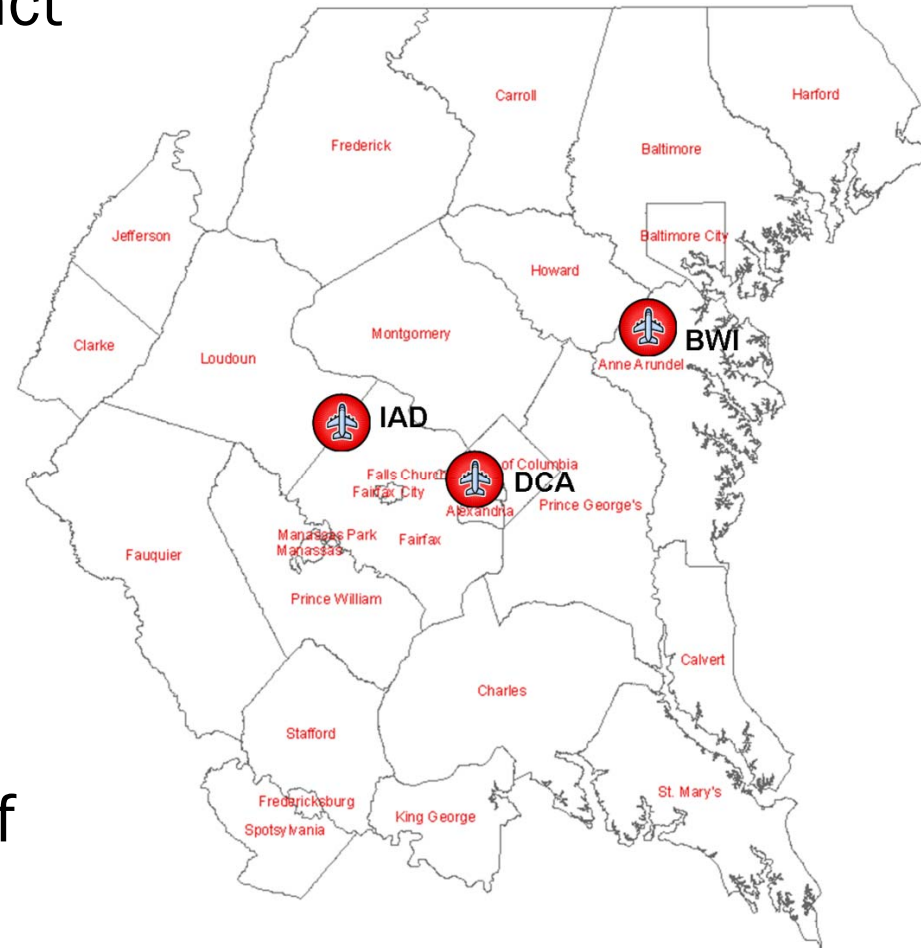
Regional Air Passenger Enplanements Trend (2000-2015)

Regional Air Passenger Enplanements had been flat at 32 Million Since 2005, but grew to 34.1 Million in 2015
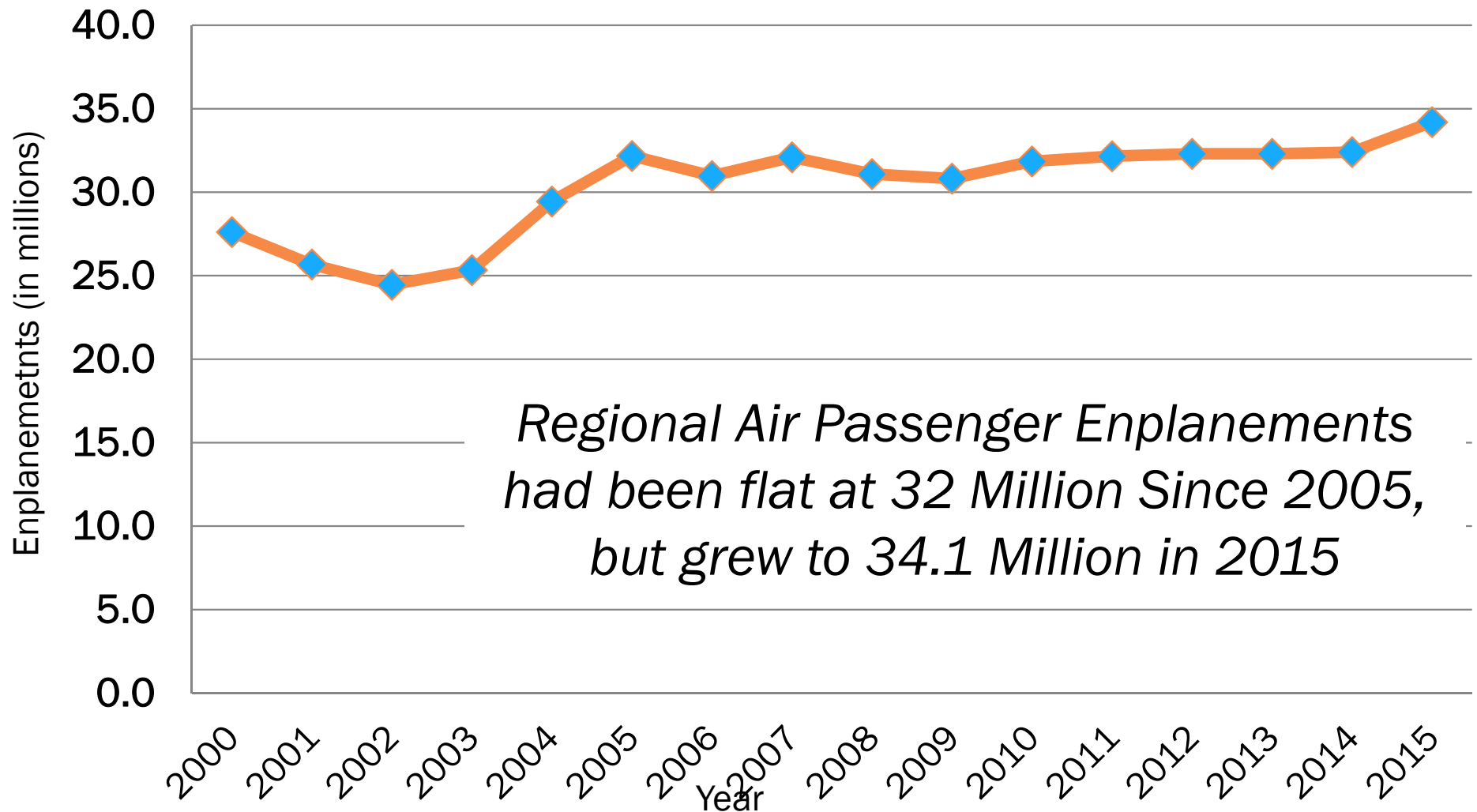
Regional Air Passenger Enplanements Trend (2000-2015) by Airport

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2015 Regional Air Passenger Enplanements by Airport

10.7
31%

11.9
35%

11.5
34%

- BWI
- DCA
- IAD

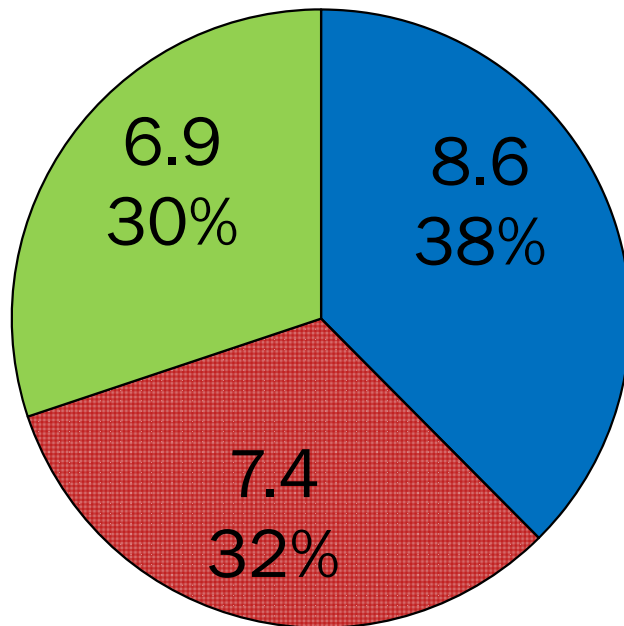34.1 Million
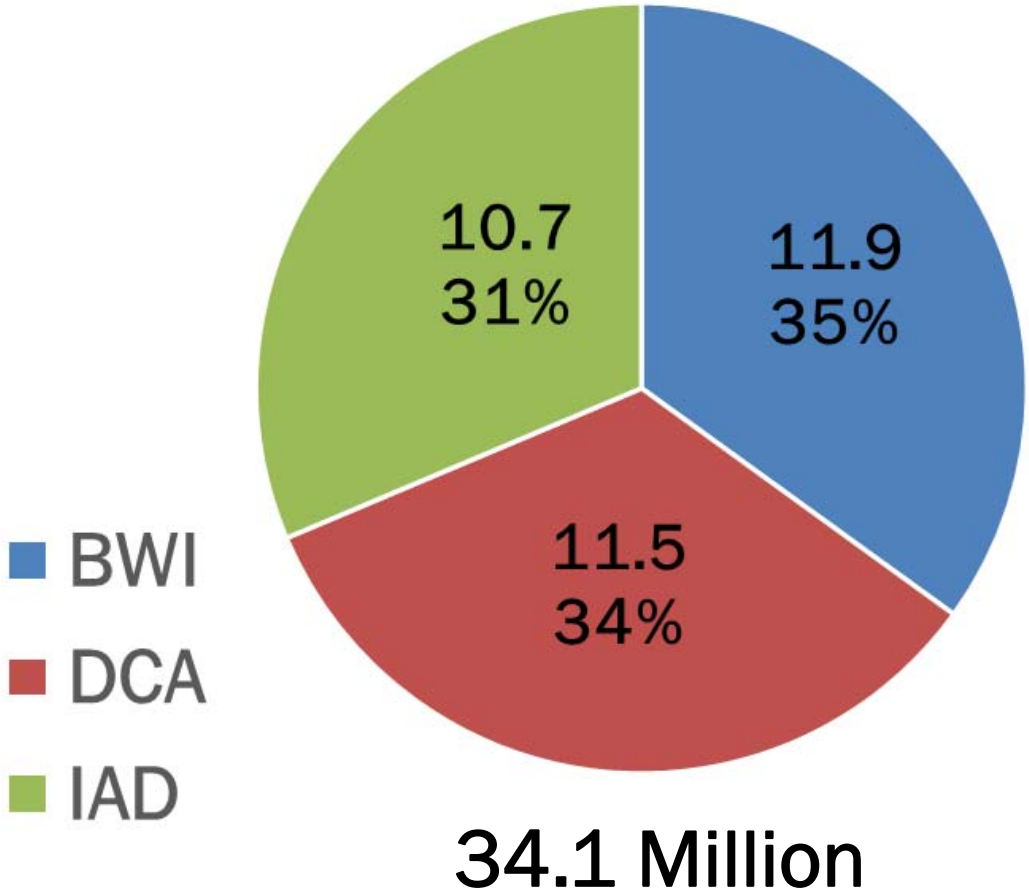
Comparing Locally Originating and Connecting Passengers (2015)

- Locally originating passengers use the regional surface transportation network to access the airport

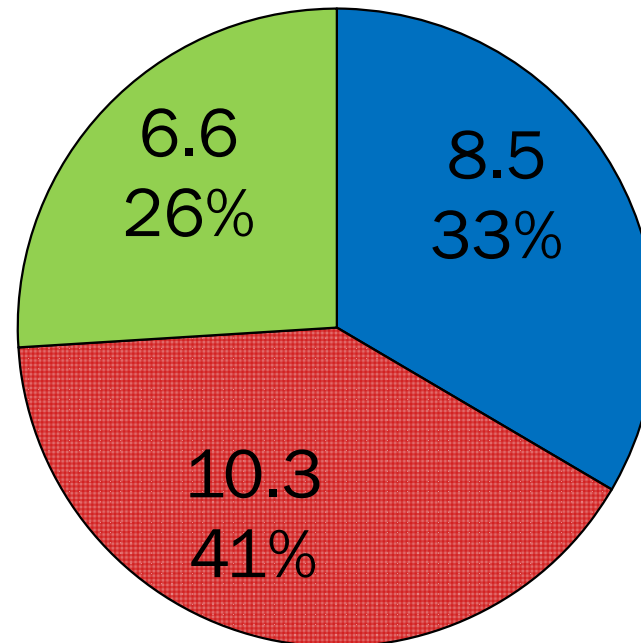- Connecting passengers are often flying an airline for which the airport is a hub or focus city

Bar chart showing Local and Connecting passenger percentages:
- BWI: Local 71%, Connecting 29%
- DCA: Local 90%, Connecting 10%
- IAD: Local 62%, Connecting 38%

Legend: ■ Local ■ Connecting
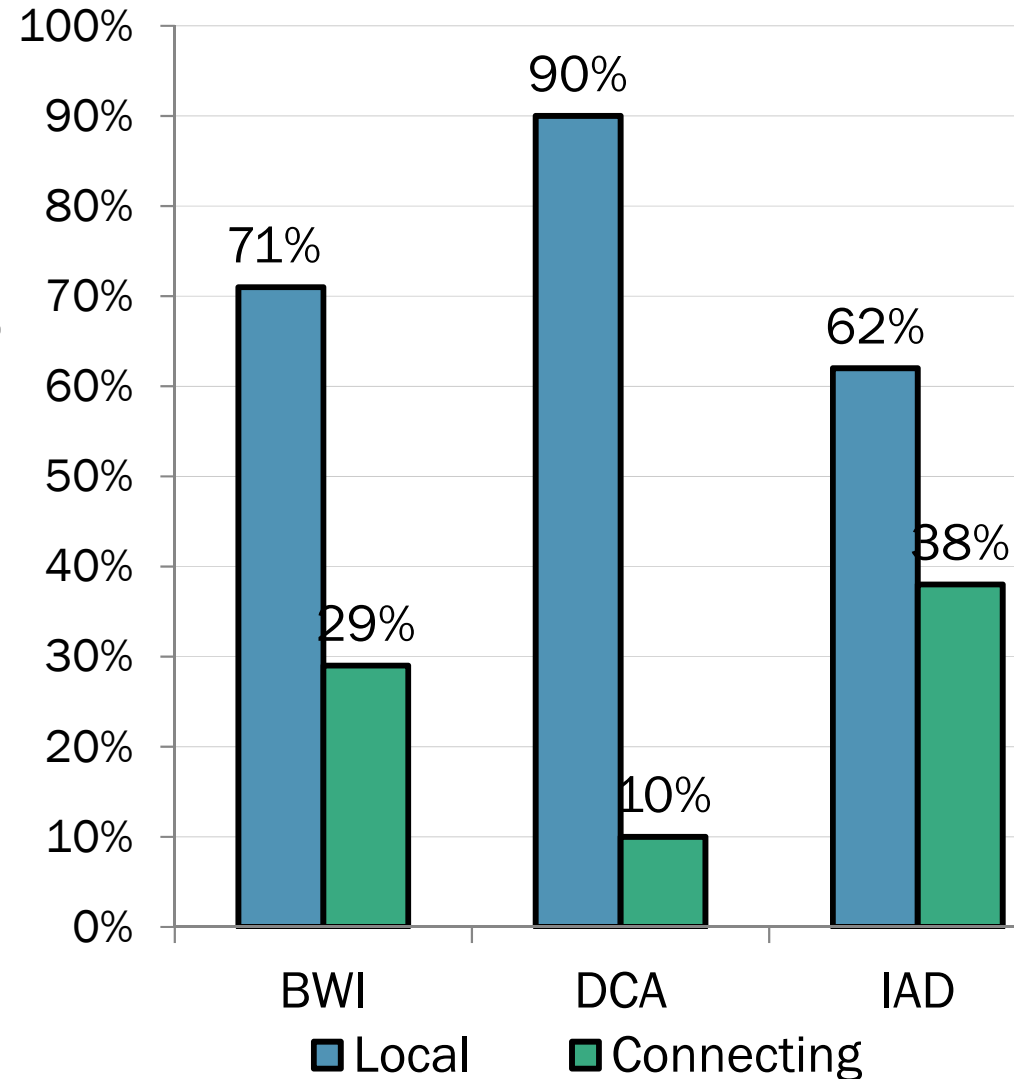
Change in Local Originations by Airport

2005

6.9
30%

8.6
38%

7.4
32%

22.9 Million

2015

6.6
26%

8.5
33%

10.3
41%

25.4 Million

■ BWI

■ DCA

■ IAD

Change in Trip Purpose – All Airports

2011

44%

56%
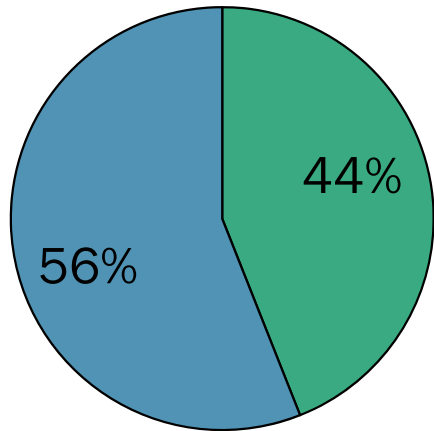
24.4 Million Passengers

2013

33%

67%
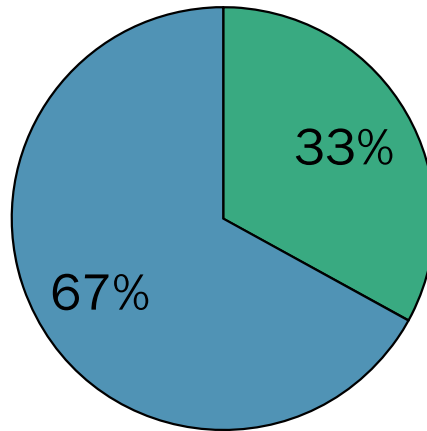
Federal Sequester
Federal Shutdown

23.4 Million Passengers

2015

37%

63%

■ Business
■ Non-Business
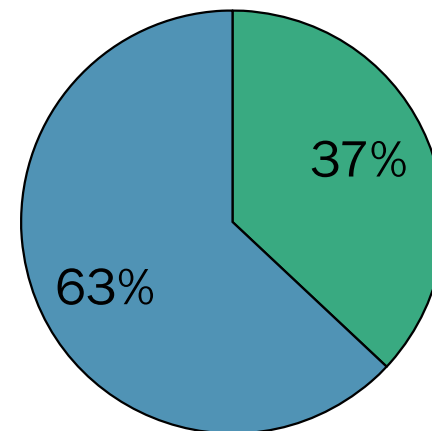
25.1 Million Passengers

Factors Influencing Airport Choice for Travelers (All Purposes) by Airport (2015)

	BWI	DCA	IAD	All
Closest airport	28%	33%	25%	29%
Better public ground transportation	3%	10%	2%	6%
Better access roads and parking	18%	12%	14%	15%
More convenient flight times	17%	18%	19%	18%
Only airport with direct flight	7%	7%	12%	8%
Less expensive airfare	17%	12%	14%	14%
Frequent flyer with specific airline	5%	5%	7%	6%
Only airport serving market	7%	2%	5%	3%
Other	3%	2%	1%	2%

Airport Mode of Access – All Airports

2013

- Bus Transit 1%
- Other 1%
- Private Bus / Van / Limo 12%
- Rail Transit 6%
- Taxi 18%
- Private Car / Rental Car 62%

2015

- Bus Transit 1%
- Other 2%
- Rail Transit 6%
- Private Bus / Van / Limo 10%
- TNCs 9%
- Taxi 15%
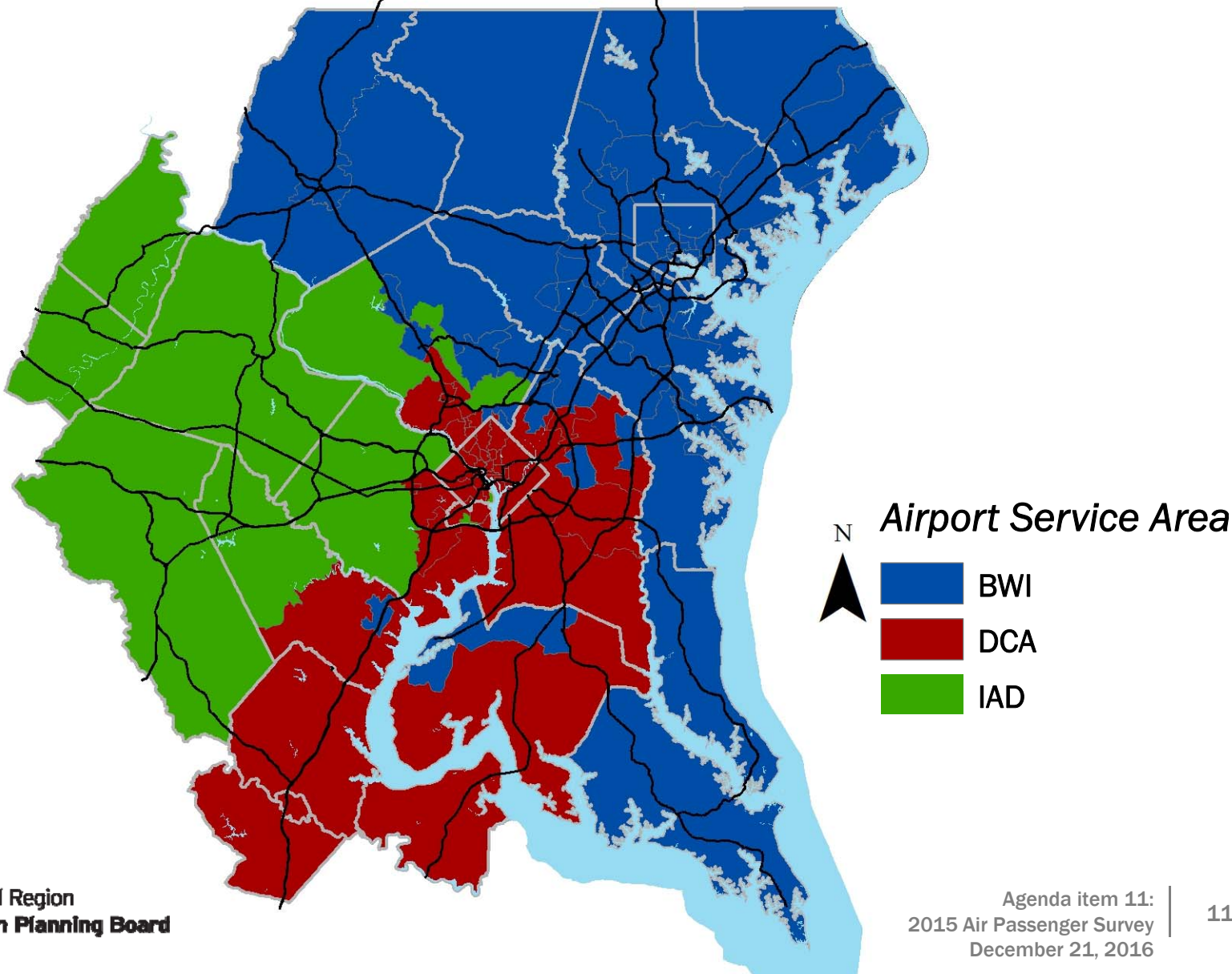- Private Car / Rental Car 57%
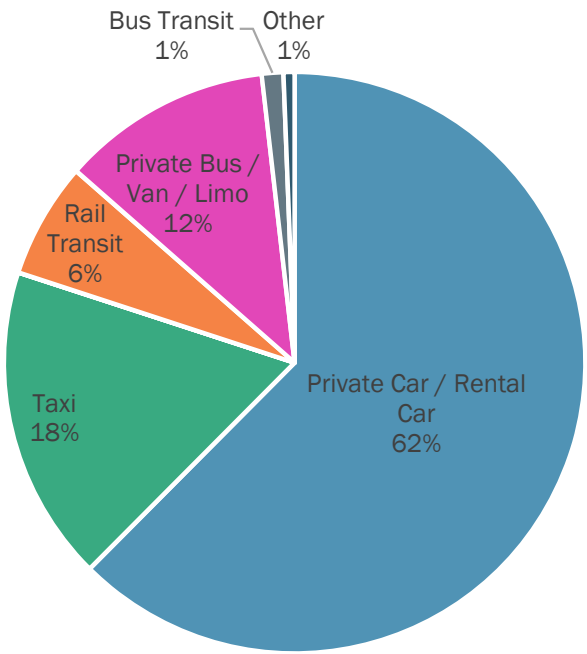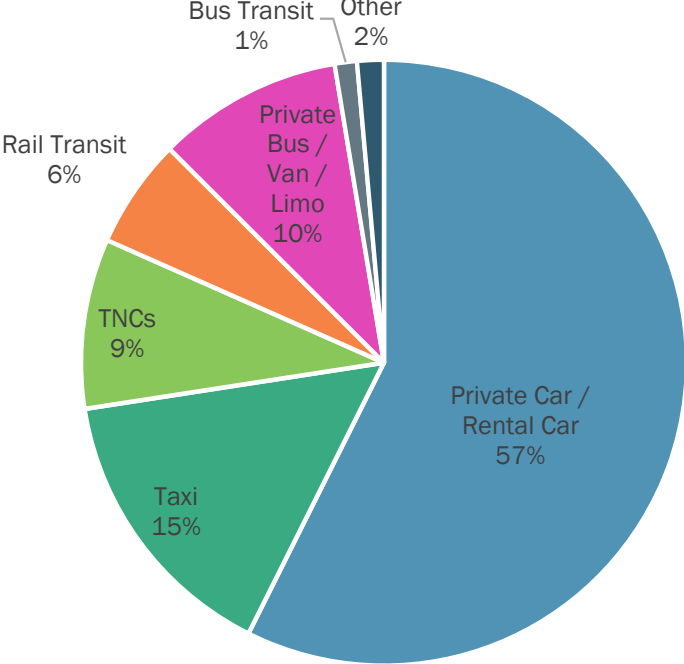
Legend:
- Private Car / Rental Car
- Taxi
- TNCs
- Rail Transit
- Private Bus / Van / Limo
- Bus Transit
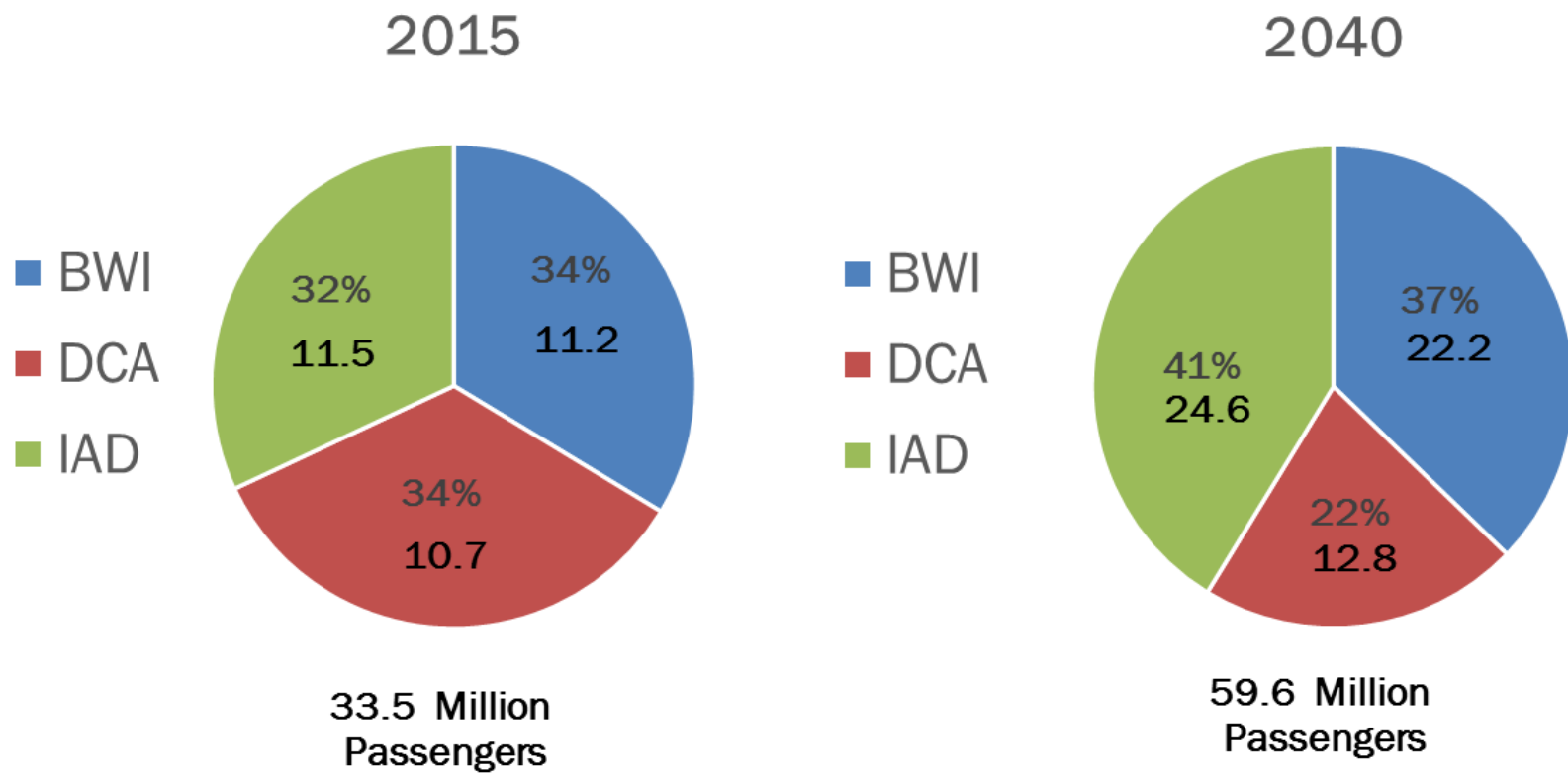
Metrorail Share at DCA
15%

Metrorail Share at DCA
12%

DCA's transit usage is among the highest in the country for airports, but has decreased between 2013 and 2015

2015 Airport Service Areas by Aviation Analysis Zone

Airport Service Area

- ■ BWI
- ■ DCA
- ■ IAD

FAA Forecast in Regional Air Passengers

2015

- BWI
- DCA
- IAD

32%
11.5

34%
11.2

34%
10.7

33.5 Million
Passengers

2040

- BWI
- DCA
- IAD

41%
24.6

37%
22.2

22%
12.8

59.6 Million
Passengers

Source: FAA Terminal Area Forecasts (2014)

Next Steps

- Receive comments on draft report from Aviation Technical Subcommittee

- Finalize report and survey data file

- Transmit data file to airports

- Begin preparations for 2017 Washington-Baltimore Regional Air Passenger Survey

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