AIR TRAVEL TRENDS IN THE WASHINGTON METROPOLITAN AREA

Key Findings from the 2017 Washington-Baltimore Regional Air Passenger Survey

Arianna Koudounas, AICP
Transportation Planner
Metropolitan Washington Council of Governments (COG)
Transportation Planning Board (TPB)

Citizens Advisory Committee
April 11, 2019

National Capital Region
Transportation Planning Board

Presentation Overview

- Continuous Airport System Planning Program (CASP)
  - TPB Policy Elements
  - Aviation Technical Subcommittee

- Washington-Baltimore Air Passenger Survey
  - Survey Instrument and Methodology
  - General Findings Report
  - Geographic Findings Report

- Next Steps

About the Continuous Airport System Planning (CASP) Program

Goal: To provide a process that supports the planning, development, and operation of airport facilities and the transportation facilities that serve the airports in a systematic framework for the Washington-Baltimore region

Origin: Conducted by TPB since 1978

Supported by:
- Federal Aviation Administration (FAA)
- Maryland Aviation Administration (MAA)
- Metropolitan Washington Airports Authority (MWAA)

About the Continuous Airport System Planning (CASP) Program - Continued

Consists of a continuous cycle:

- Regional Air Passenger Survey
- Forecasts of Future Air Passenger Air + Ground Travel
- Revised Regional Air System Plan for Ground Access

Developed, implemented, and monitored with the assistance of the Aviation Technical Subcommittee (ATS) of the TPB's Technical Committee. The subcommittee is responsible for coordinating airport system planning with the regional transportation planning process.

CASP Consistency with TPB Policy Elements

Aspirational Initiatives

The express travel network would provide several benefits for airport ground access connectivity, including reducing congestion and incentivizing travelers to either carpool or travel by transit vehicle. Expanding Metrorail capacity would increase logistical ease and comfort for those traveling by Metrorail to and from airports.

Planning Factors

- Enhance travel and tourism
- Increase accessibility and mobility of people
- Increase accessibility and mobility of freight

Regional Transportation Priorities Plan (RTPP) Goals

- Provide a comprehensive range of transportation options
- Support inter-regional and international travel and commerce

Aviation Technical Subcommittee (ATS)

The ATS consists of representatives from:

- Maryland Aviation Administration (MAA)
- Metropolitan Washington Airports Authority (MWAA)
- District Department of Transportation (DDOT)
- Federal Aviation Administration (FAA)
- Virginia Department of Aviation (DOAV)
- Washington Airports Task Force (WATF)
- Representatives from local airports and jurisdictions

Survey Overview

- Collect information on changing travel patterns and air passenger characteristics (ie: resident status, age, income)

- Help determine airport terminal and groundside needs

- Survey every two years at region's three commercial airports

- Passengers surveyed at departure gates while waiting to board flights

- Random sample of domestic and international flights during two-week period in October

- 22,000 departing passengers surveyed from 657 flights
  - 582 domestic
  - 75 international

Survey Content: Information Gathered

- Primary mode of transportation to airport

- Reason for selecting mode of transportation

- Ground Access Origin

- Ground Access Length of Travel Time

- Airport Origin and Destination

- Reasons for Airport Selection

- Airport Preference

- Trip Purpose

- Curbside drop-off and parking

- Check-in and bag check (curbside, kiosk, ticket agent)

Key Findings

- **Taxis & TNCs Reversed Share of Use:** By 5%, respectively
  Note: TNCs= Transportation Network Companies i.e.: Uber, Lyft, Via

- Main reason for choosing primary means of transportation was Ease of Use (46.6%)

- **Response Rate Decline:** 27.4% in 2017, down from 31% in 2015

- **Dominant Travel Purpose by Airport**

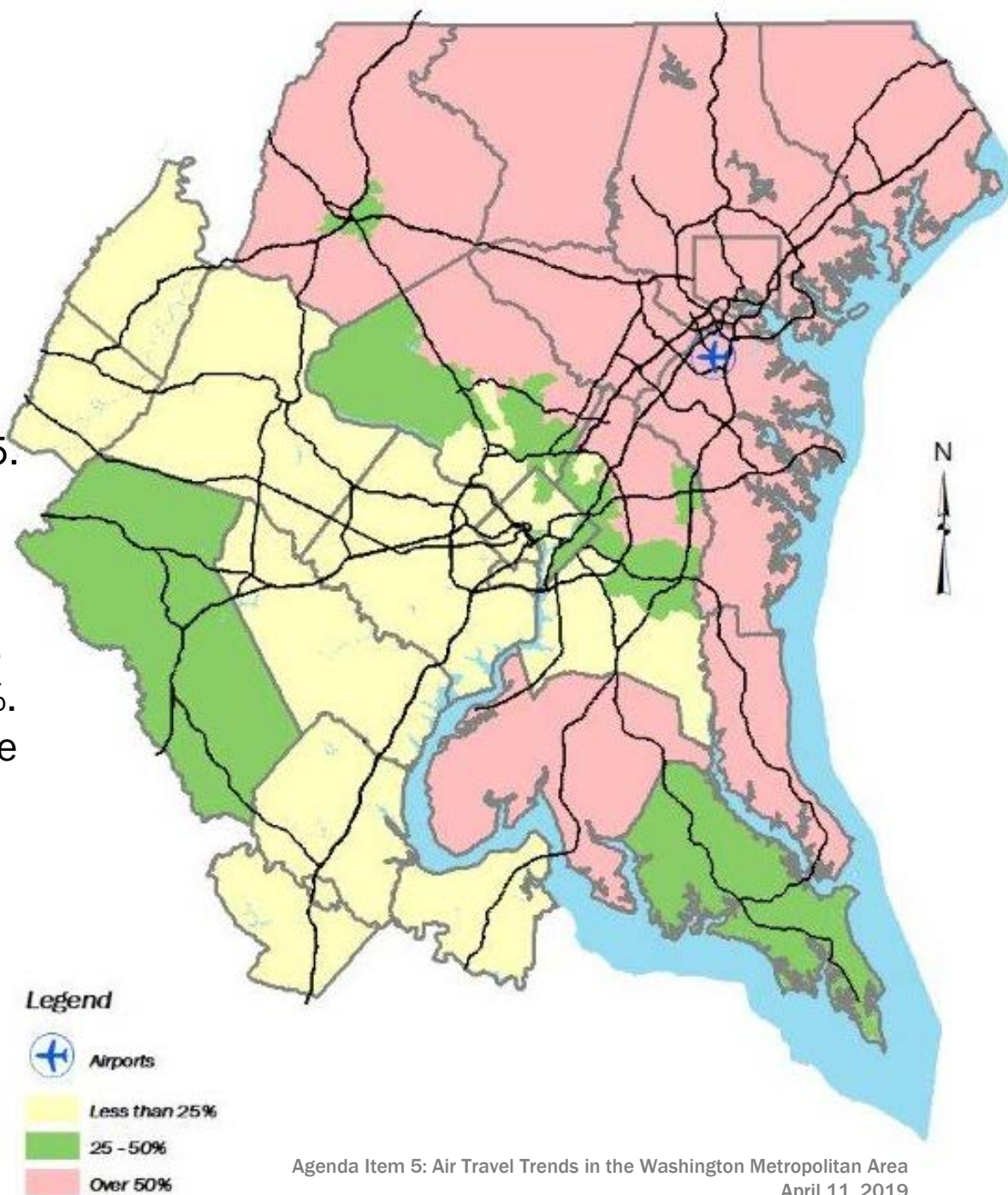 - Business: DCA

  - Families: BWI

  - Vacation: IAD

Key Findings Continued

- 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 :

  - BWI: +5%

  - DCA: +1.3%

  - IAD: +10%

- Connections increased at BWI and DCA, declined at IAD:
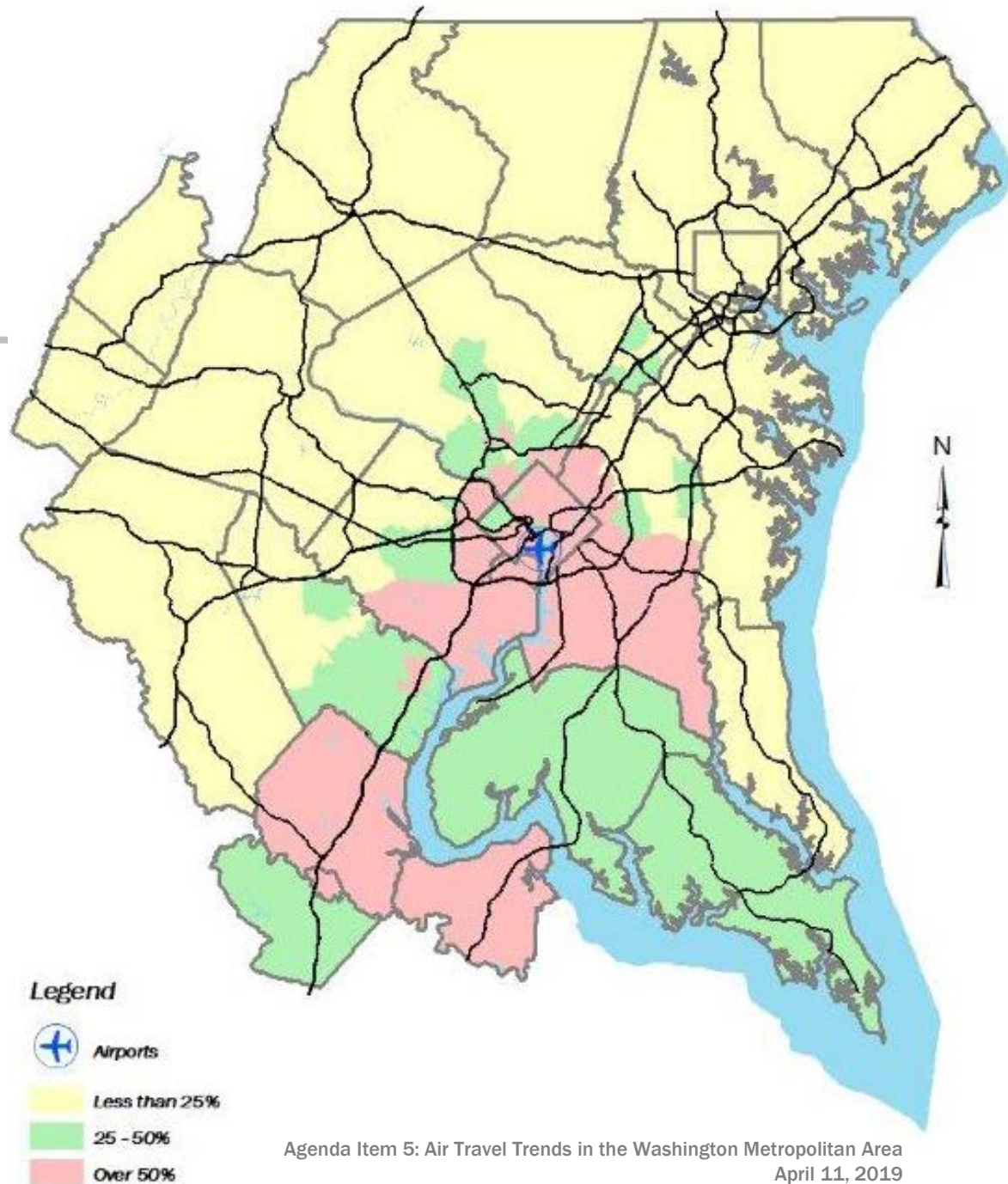
  - BWI: + 25%

  - DCA: + 29%

  - IAD: -1.4%

Percentage of Passengers Using BWI

Local originations at BWI increased by 5% from 2015. Passengers traveling to BWI from the Virginia suburbs increased by 24%, from the Maryland suburbs by 16%, and from DC by 2%. Originations to BWI from the outlying jurisdictions dropped by 5%.

Legend

✈ Airports

🟨 Less than 25%

🟩 25 – 50%

🟥 Over 50%

N

National Capital Region
**Transportation Planning Board**

Percentage of Passengers Using DCA

Local originations at DCA increased by 1% from 2015. 71% of the Washington Core flew out of DCA. Portions of Montgomery, Prince George's, Prince William, and Stafford Counties along the I-95 corridor account for significant numbers of passengers using DCA.

Legend

✈ Airports

Less than 25%

25 – 50%

Over 50%

N

National Capital Region
Transportation Planning Board

Percentage of Passengers Using IAD

Local originations at IAD increased by 10% from 2015. 71% of IAD passengers were from the Virginia Suburbs and DC. Originations from the Maryland suburbs and the Baltimore metropolitan area increased by 59 percent and decreased by 12 percent, respectively.

Legend

✈ Airports

0 - 24

25 - 49

50 - 100

N
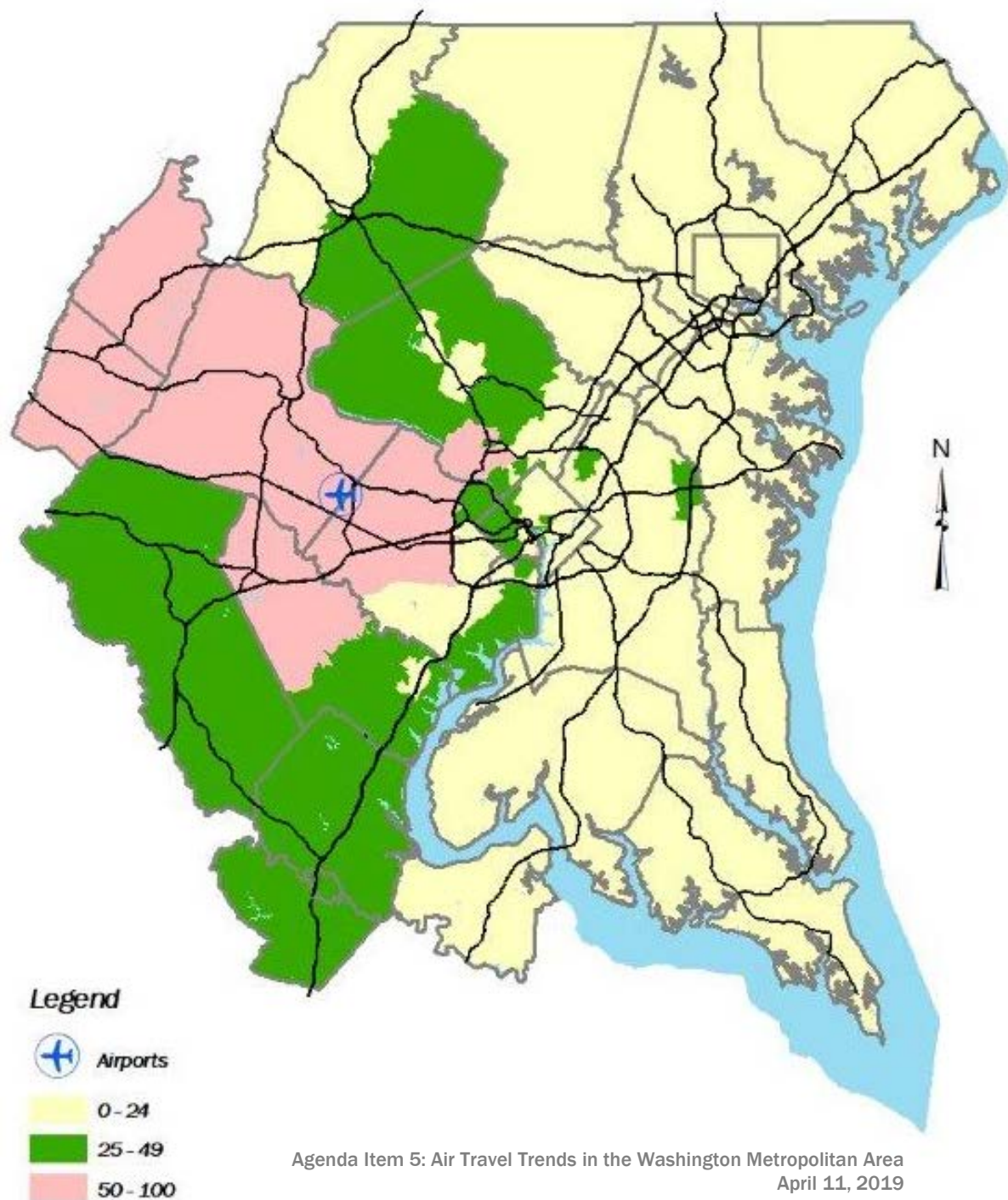
Ground Trip Origin: By Airport
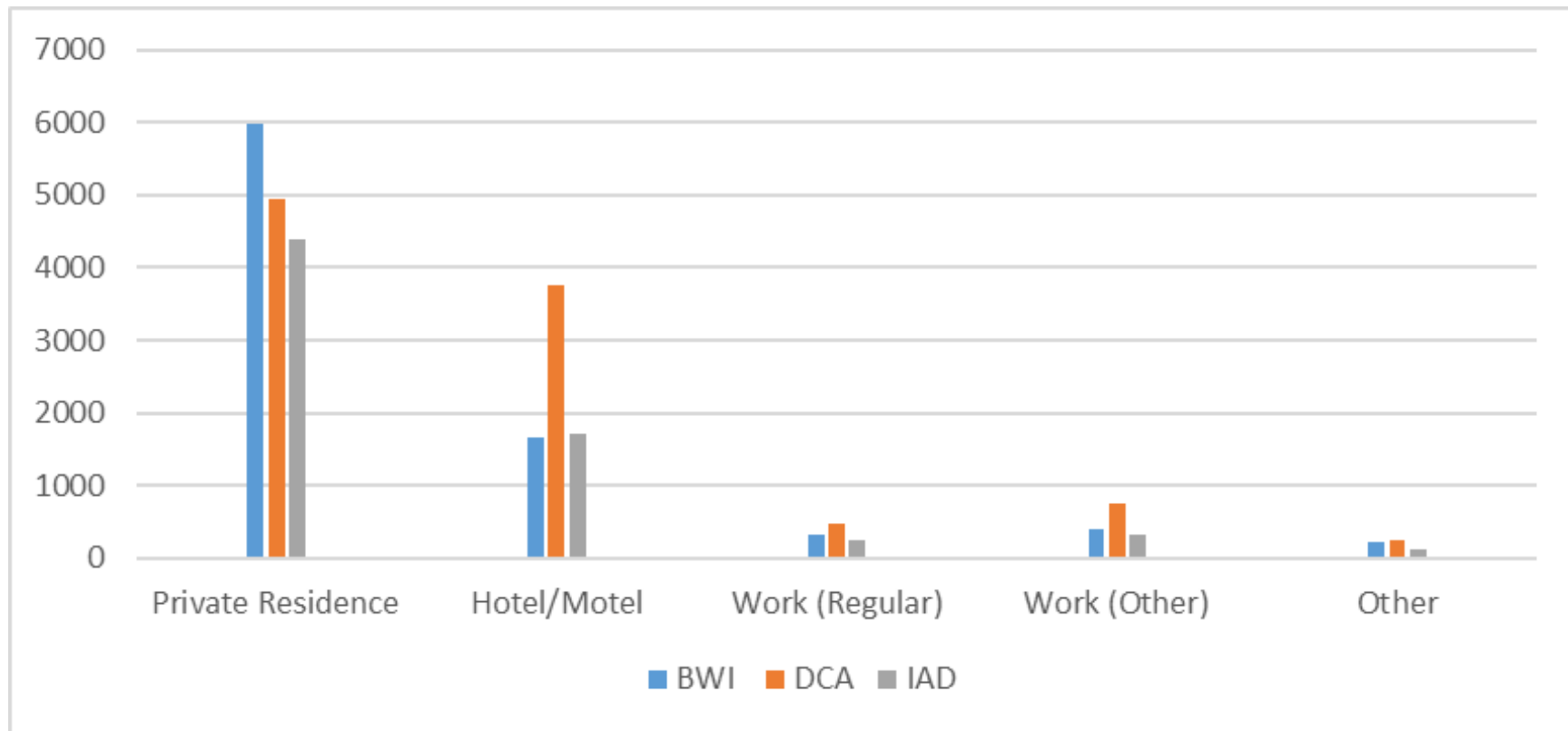

Note: Numbers provided are in thousands

Mode of Access

- The most common mode of access to airport continued to be the automobile, accounting for 84% of total trips to all airport

- Metrorail usage at DCA increased to 13% from 12% in 2015

- 14% of the region's air passengers accessed the airport by TNC

  - 21% to DCA - almost double IAD and triple BWI

  - TNC users to DCA accounted for 60% of the regional total

  - The decline in taxicab and rental car trips to DCA could be attributed to TNCs

Mode of Access: 2013, 2015, 2017
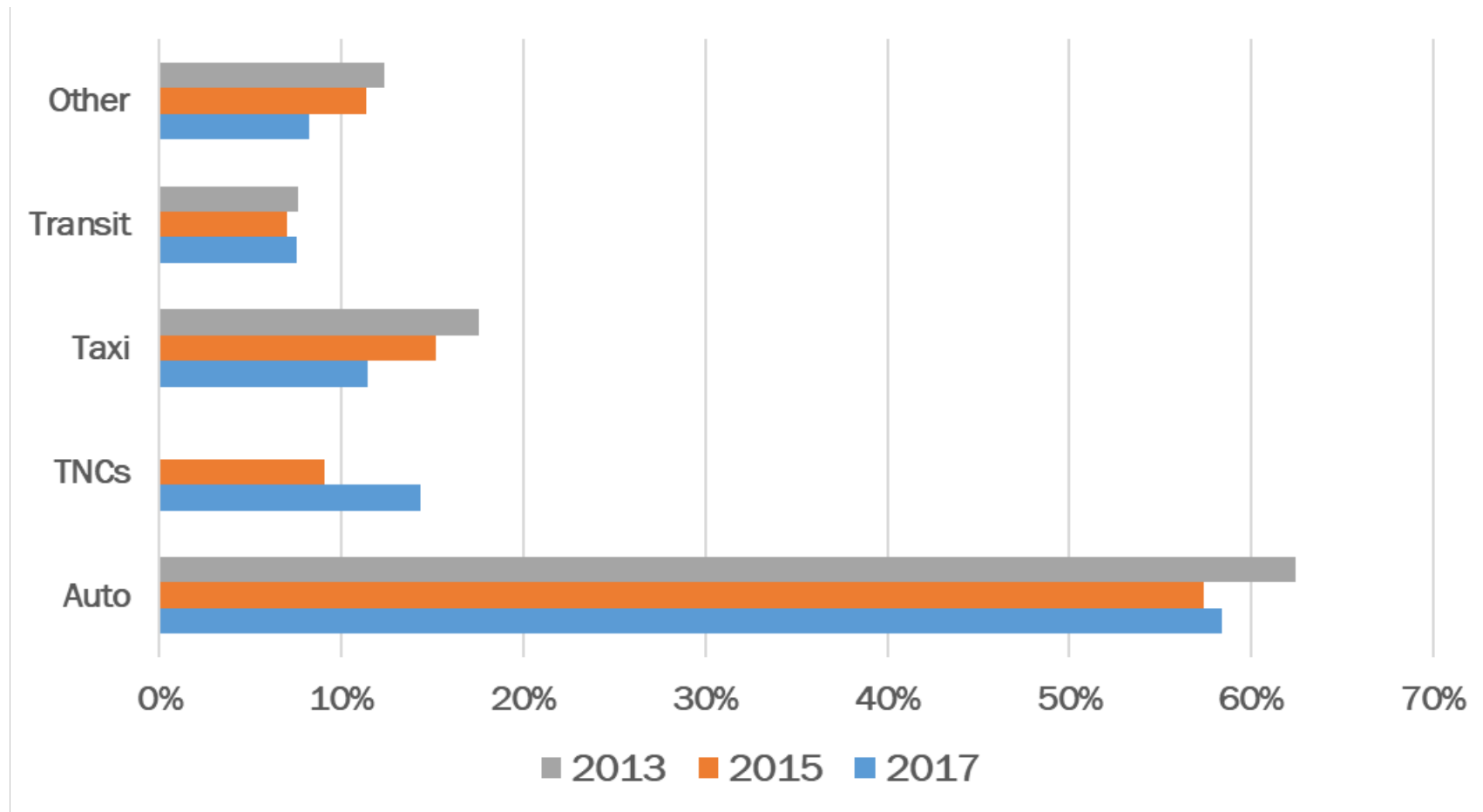
Percentage of Passengers Using Taxicabs

11% of the region's passengers traveled by taxicab –down from 16% in 2015. The The areas with the highest concentrations of taxicab usage are located within the Washington Core (20%) and the Baltimore Core (9%).

Legend

✈ Airports

Less than 25%
25 - 50%
Over 50%

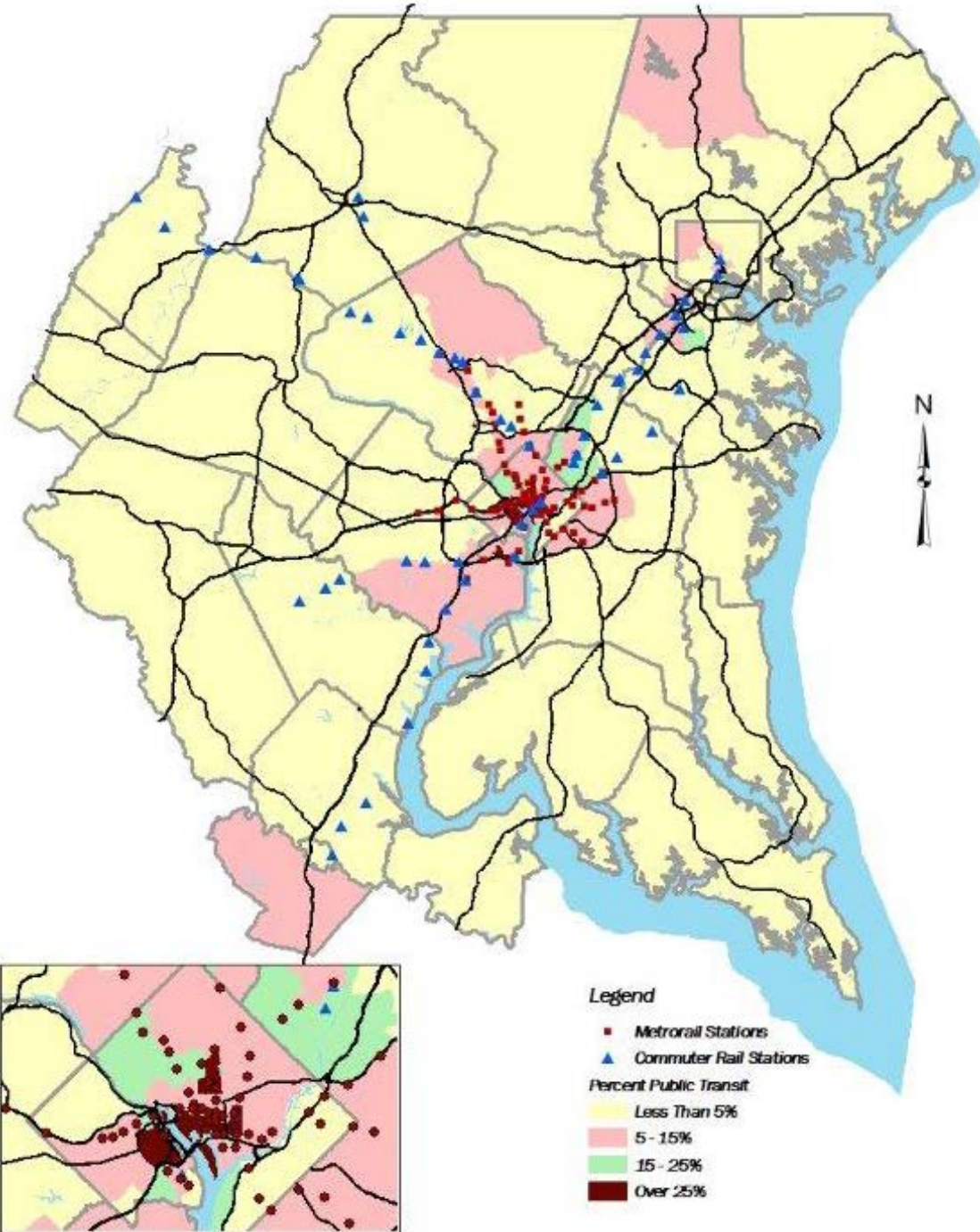National Capital Region
Transportation Planning Board

Percentage of Passengers Using TNCs

14% of the region's passengers traveled by TNC – up from 9% in 2015. 19% of the Baltimore Core and 22% Washington Core travel by TNC, respectively.

Legend

⊕ Airports

Less than 10%

10 - 25%

25 - 50%

Over 50%
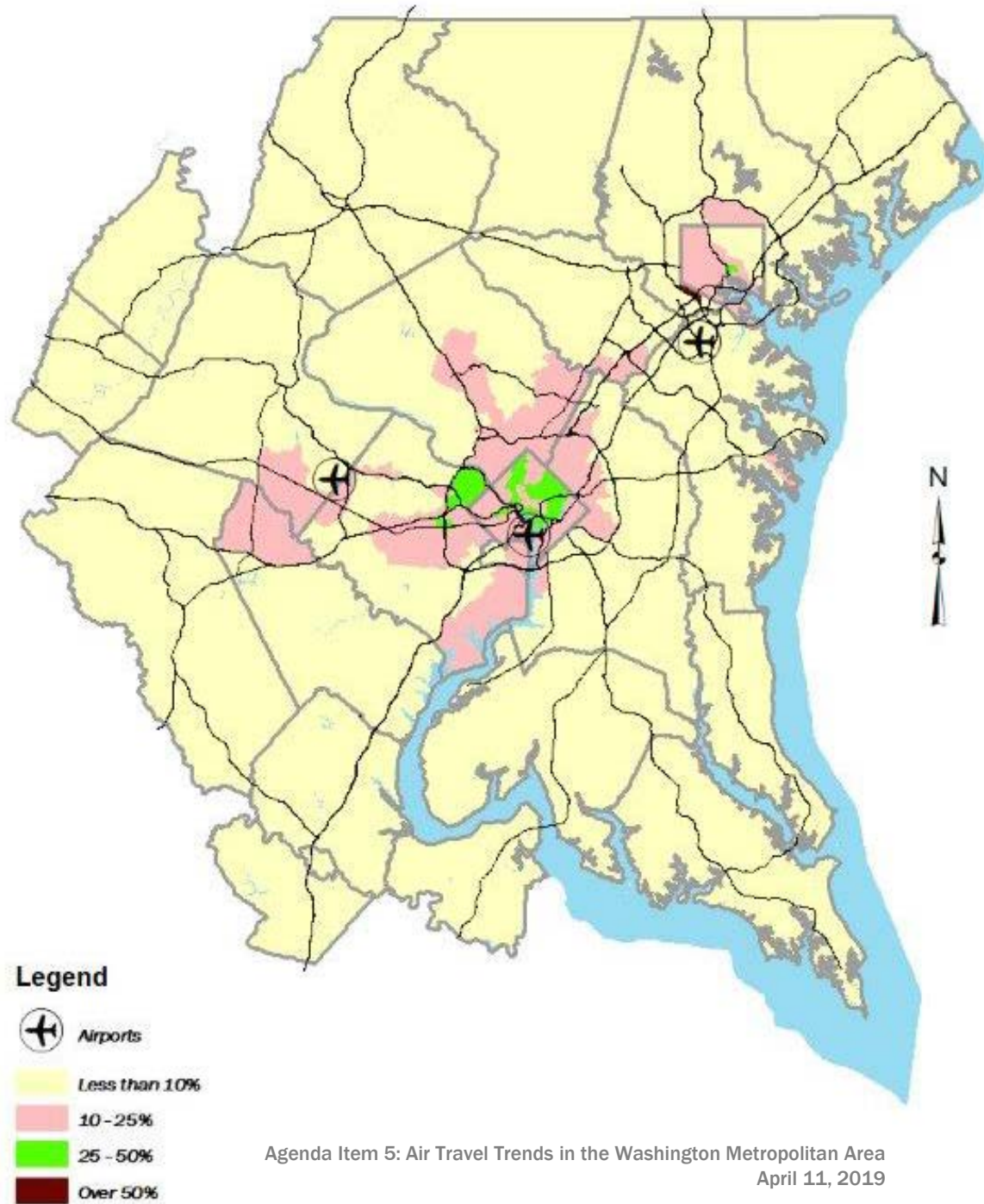
Percentage of Passengers Using Metrorail, Commuter Rail, Metrobus, and/or Local Bus

Public transportation carried 9% of the region's passengers. Usage of public transportation within the Washington Core was double the regional average and triple that of the Baltimore Core.

National Capital Region
Transportation Planning Board

Legend
- ■ Metrorail Stations
- ▲ Commuter Rail Stations

Percent Public Transit
- Less Than 5%
- 5 - 15%
- 15 - 25%
- Over 25%

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 local originating air passengers accounted for 60%

- The share of resident departing passengers increased to 40% in 2017 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

Trip Purpose
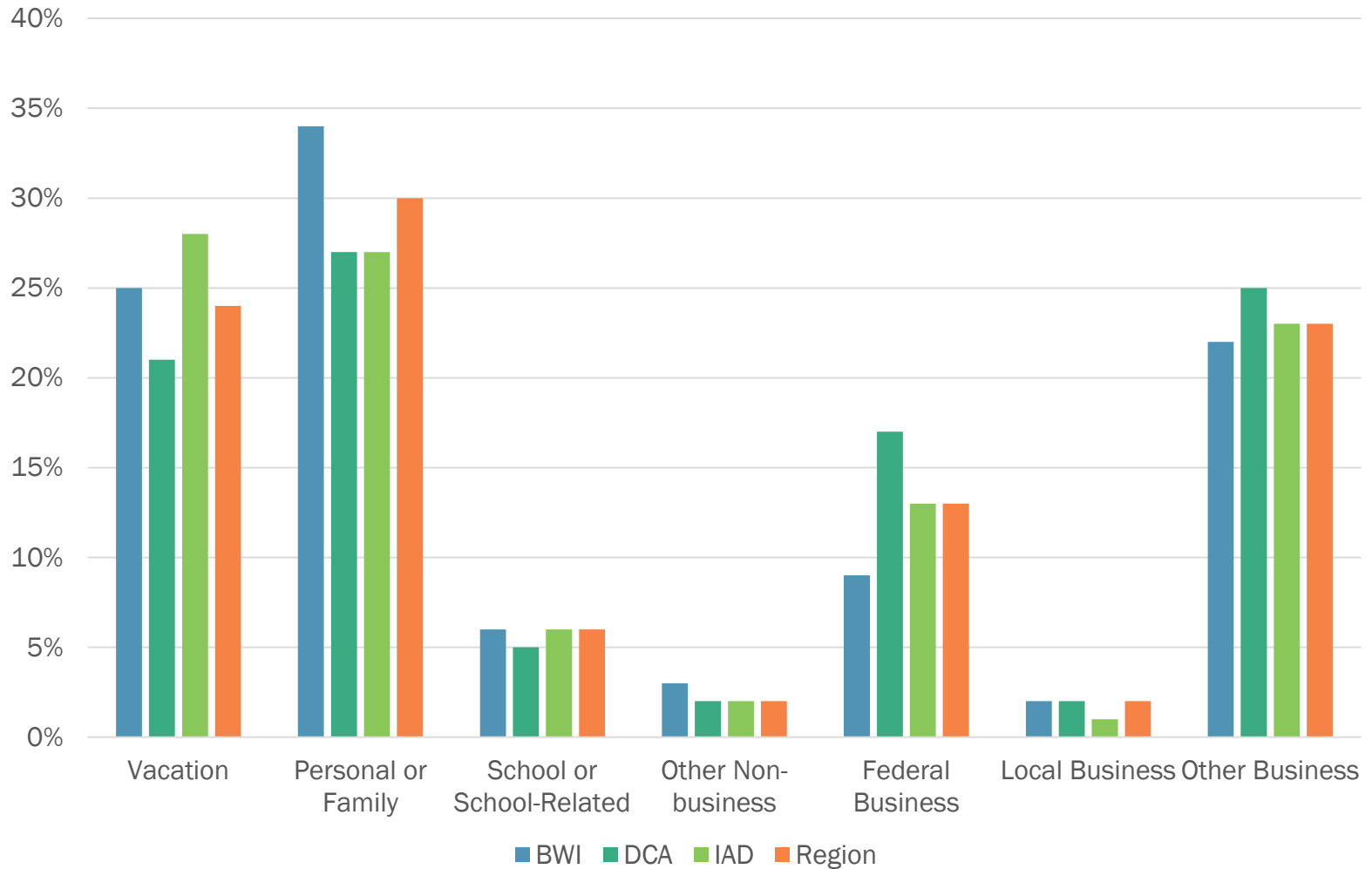
Arianna Koudounas, AICP

Transportation Planner

Department of Transportation Planning

(202) 962-3312

akoudounas@mwcog.org

Timothy Canan, AICP

Planning Data and Research Program Director

(202) 962-3280

tcanan@mwcog.org

Abdurahman Mohammed

Senior Transportation Engineer

(202) 962-3370

Abdul@mwcog.org

https://www.mwcog.org/
transportation/planning-areas/airports/casp/

Metropolitan Washington Council of Governments

777 North Capitol Street NE, Suite 300

Washington, DC 20002