

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, continuing a downward trend for the past 4 surveys.
 - Decreased 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



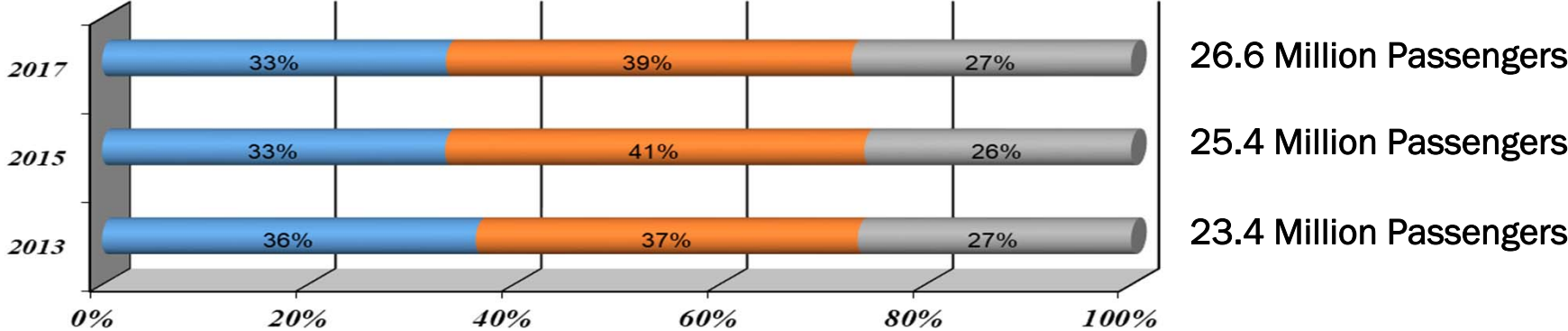
Enplanements

- 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%

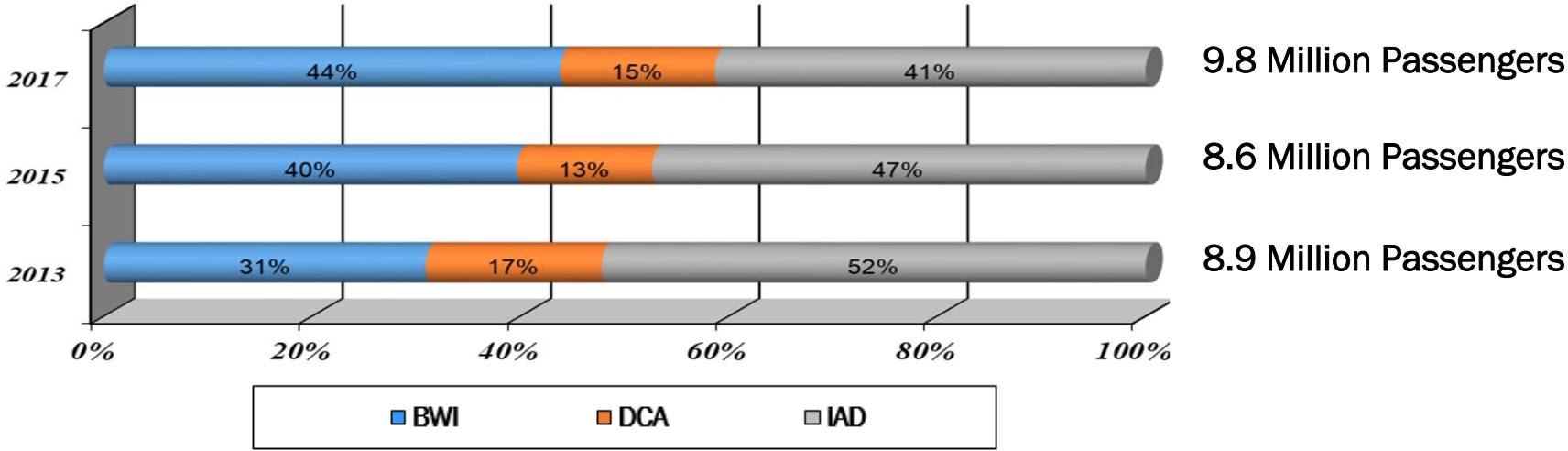


Airport Share of Locally Originating and Connecting Passengers

Local Originating Passengers



Connecting Passengers



Primary Reason for Selecting Airport

Ground Access Considerations

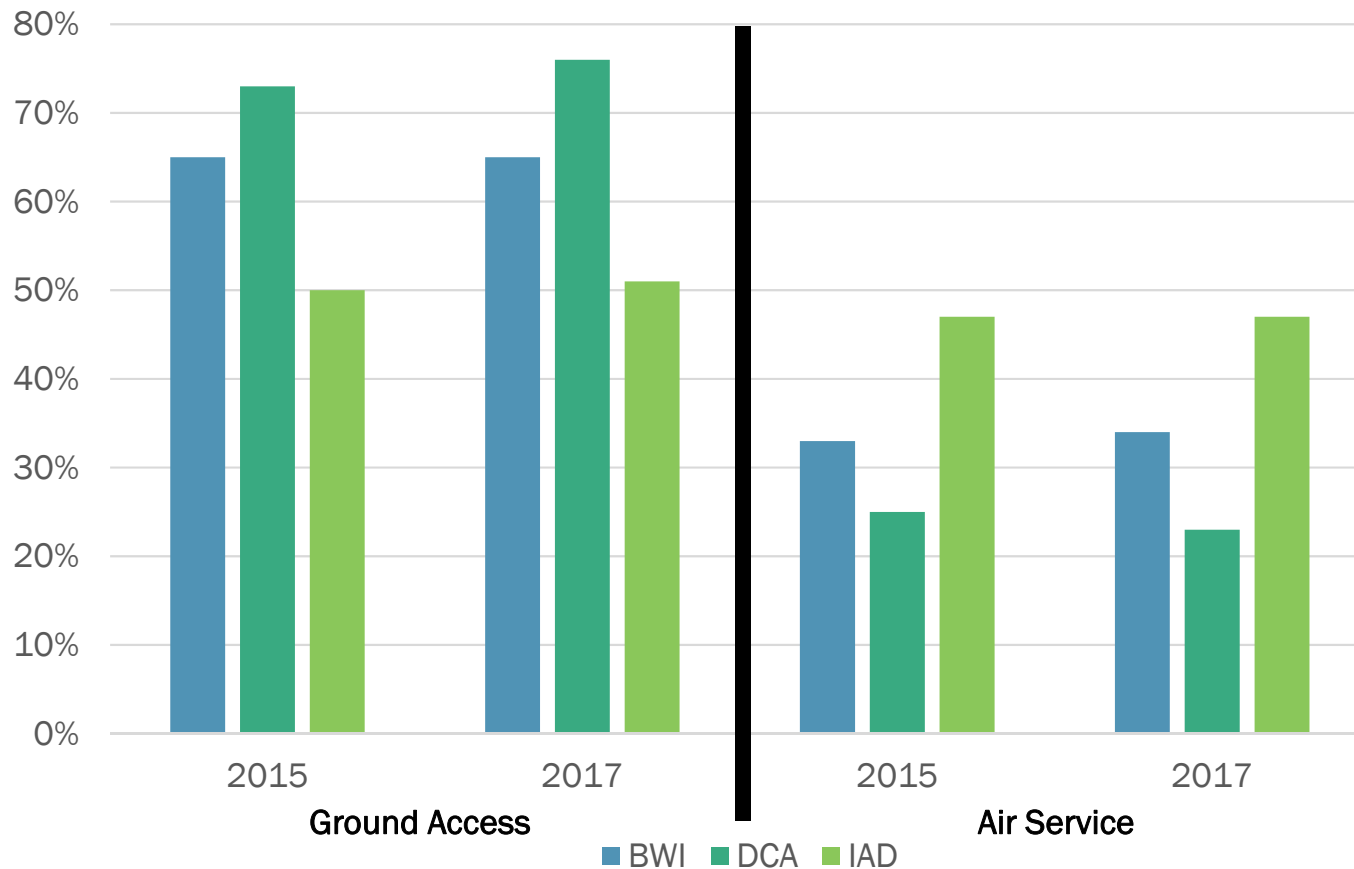
- Closest airport
- Easy Road Access
- Convenient limo, bus, or rail service
- Good parking facilities

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

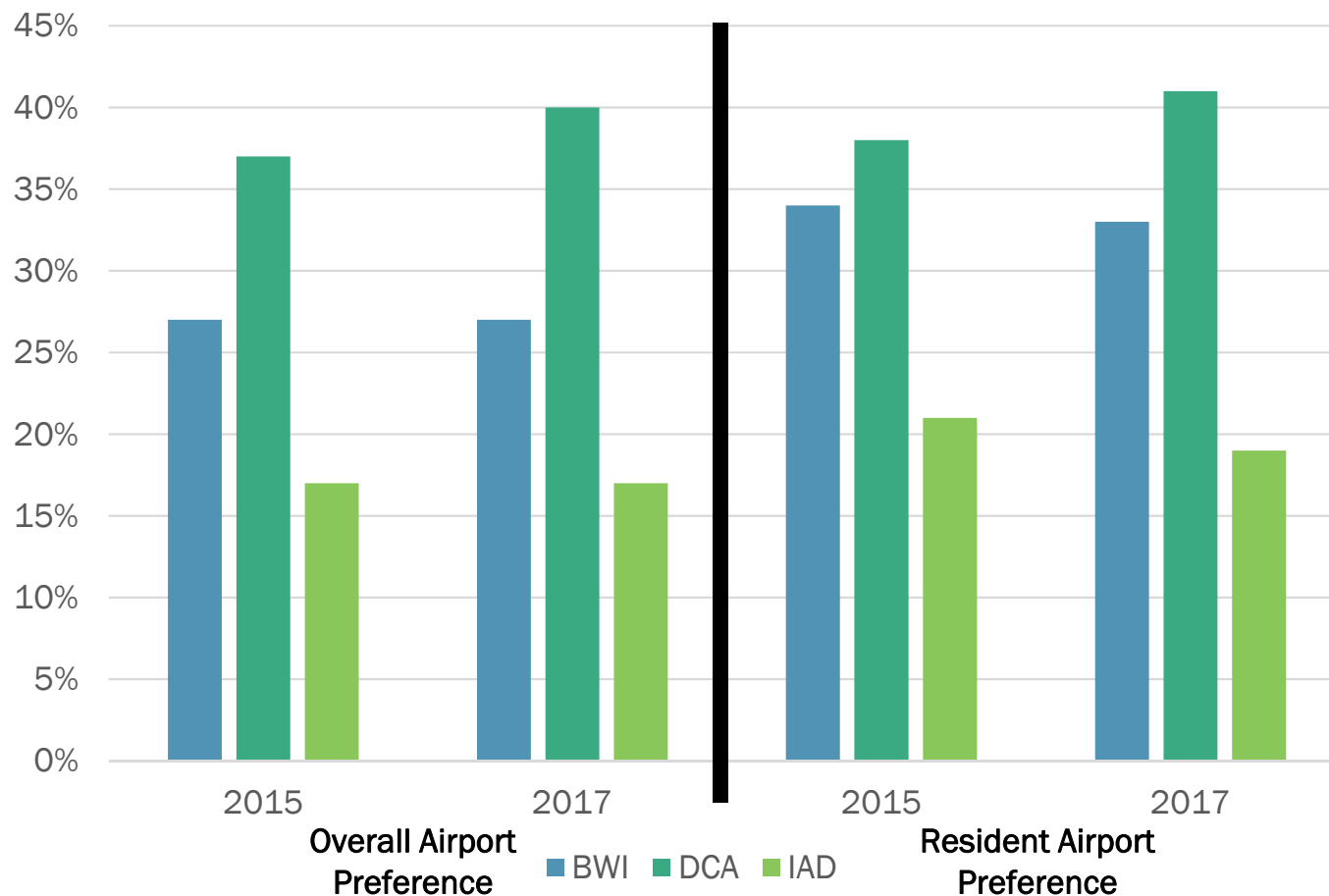


Primary Reason for Selecting Airport

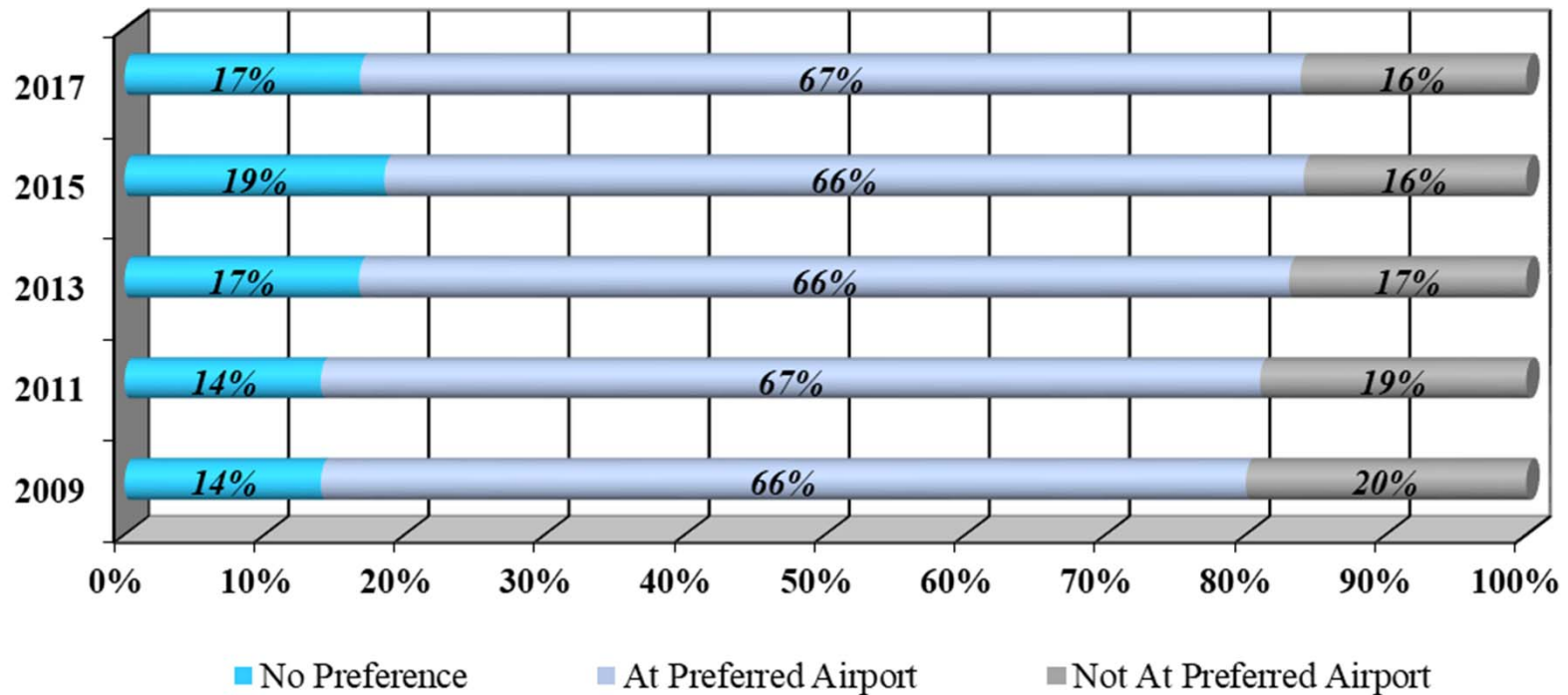
Reason	BWI	DCA	IAD	Region
<i>Accessibility</i>	65%	76%	51%	65%
<i>Quality of Service</i>	15%	15%	31%	19%
<i>Cost of Service</i>	19%	8%	16%	14%
<i>Other</i>	1%	2%	2%	2%
Total	100%	100%	100%	100%



Airport Preference Comparison, Total/Resident



Airport Preference (originating passengers)



Trip Purpose

Business

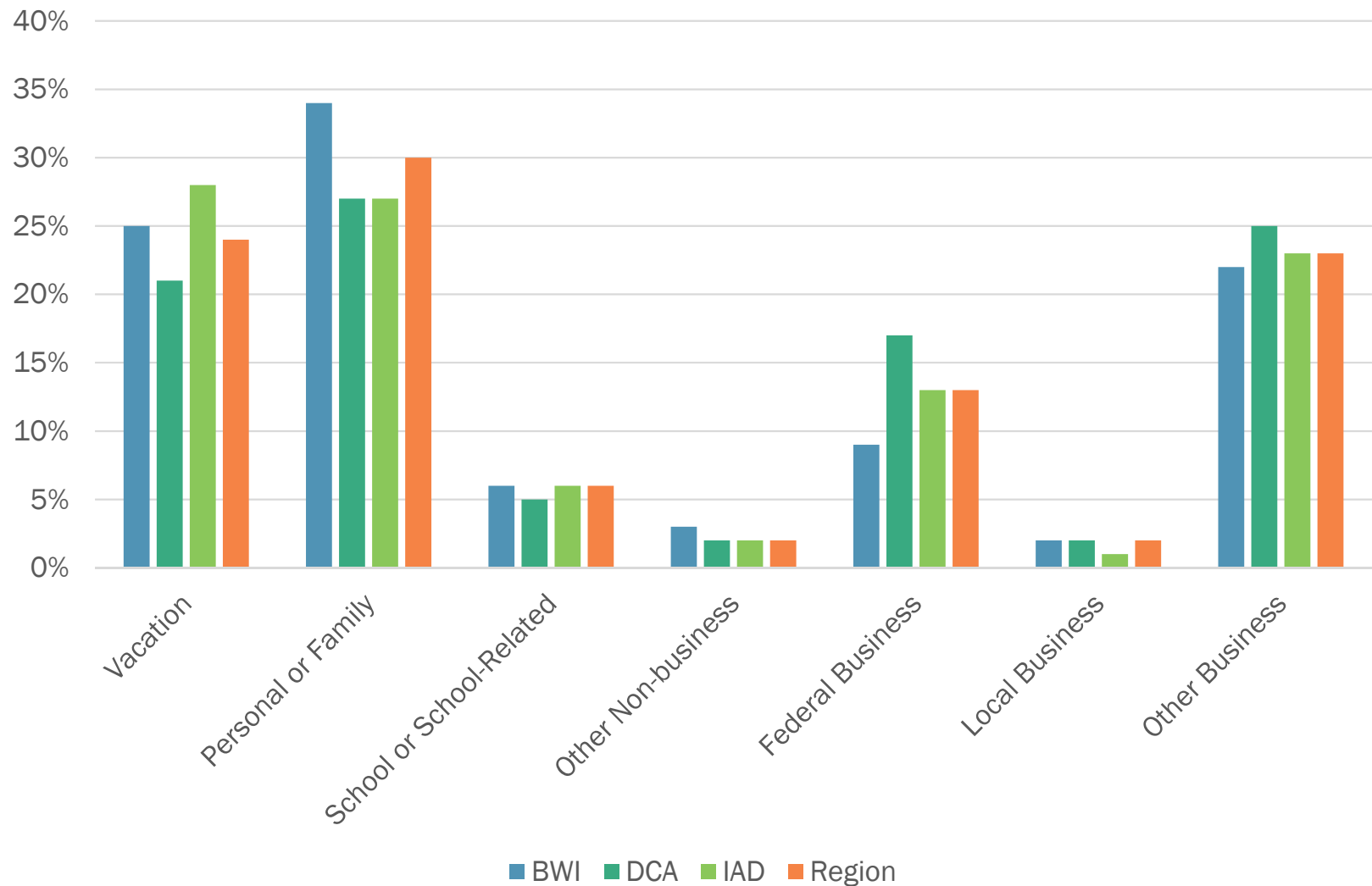
- Related to government (*includes Federal, State and Local*)
- Other non-government related

Non-Business

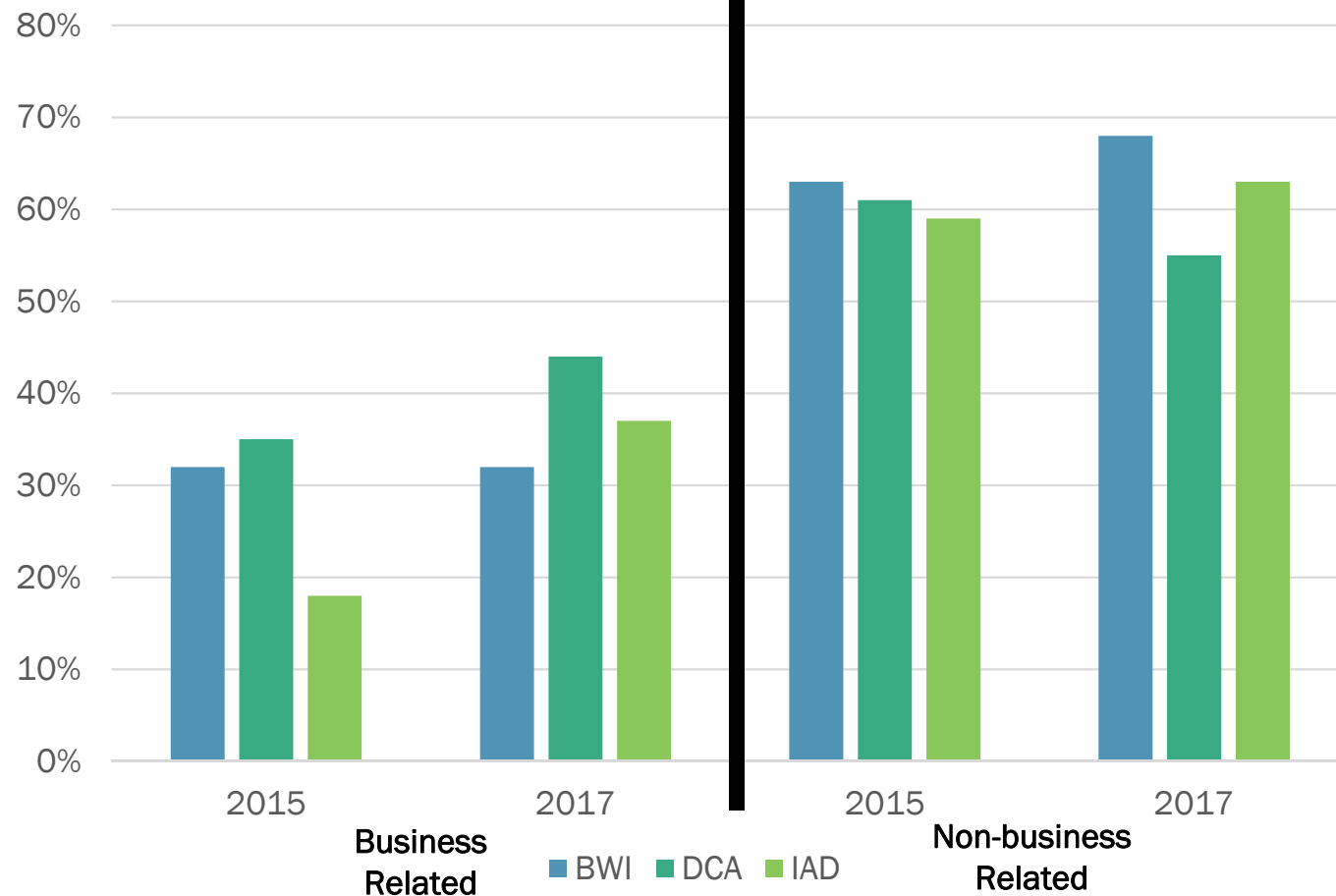
- Vacation
- Personal or family affairs
- Student or school related
- Other



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



Ground Access Trip Origin

Home

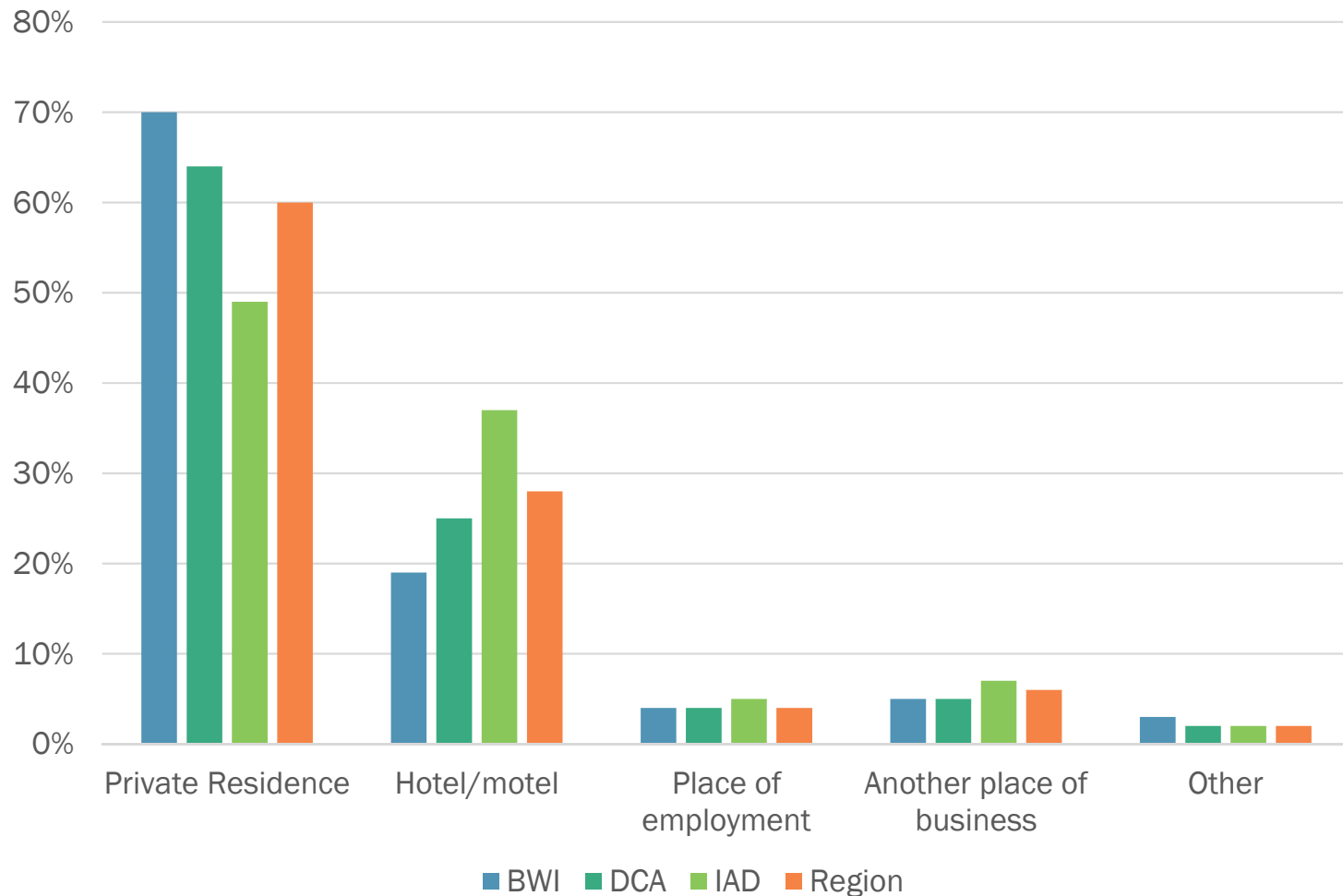
- Private residence

Non-home

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



Annual Originating Air Passengers by Ground Access Trip Origin (2017)



Mode Choice for Airport Ground Access

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

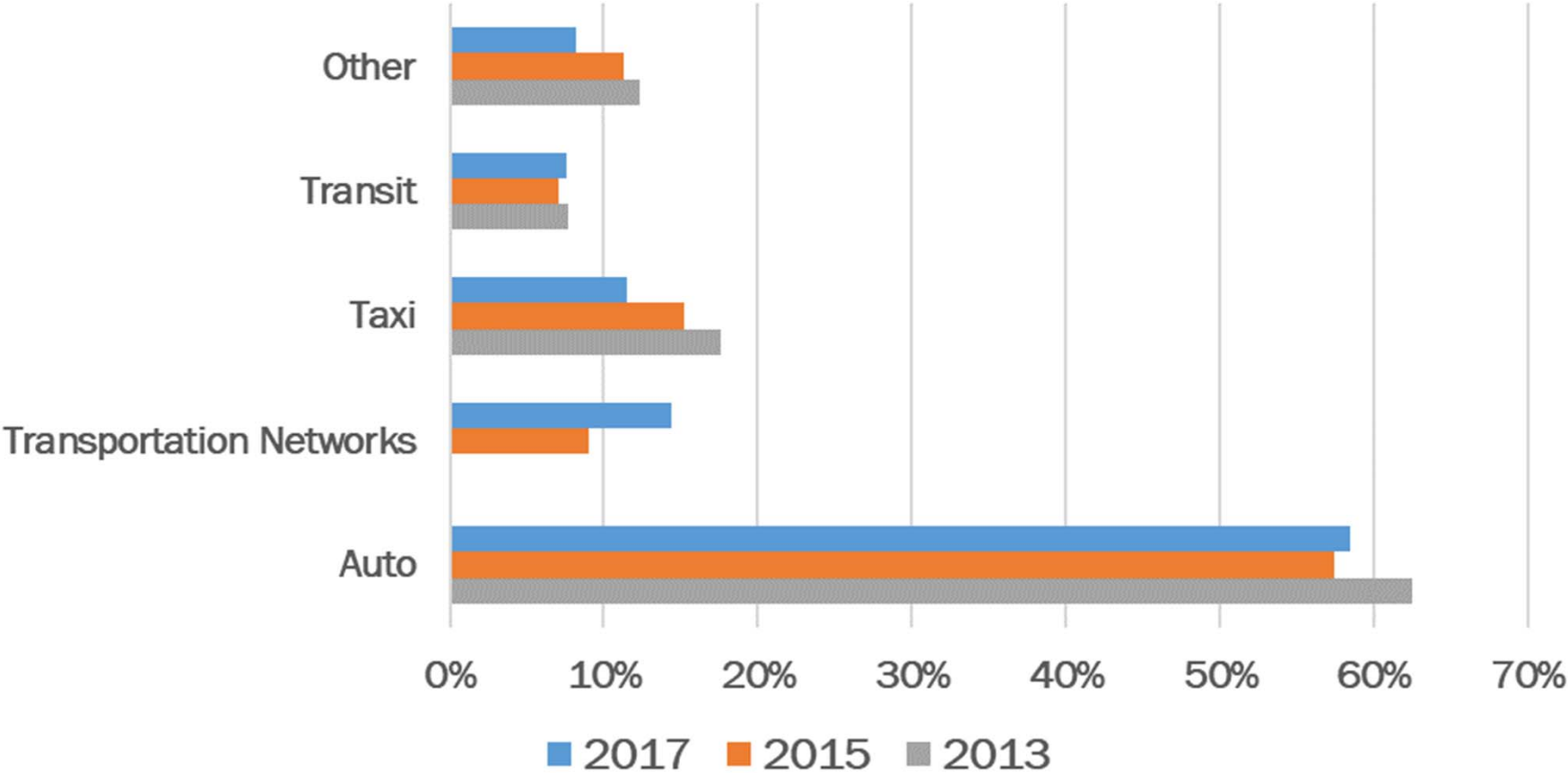


Mode Choice for Airport Ground Access

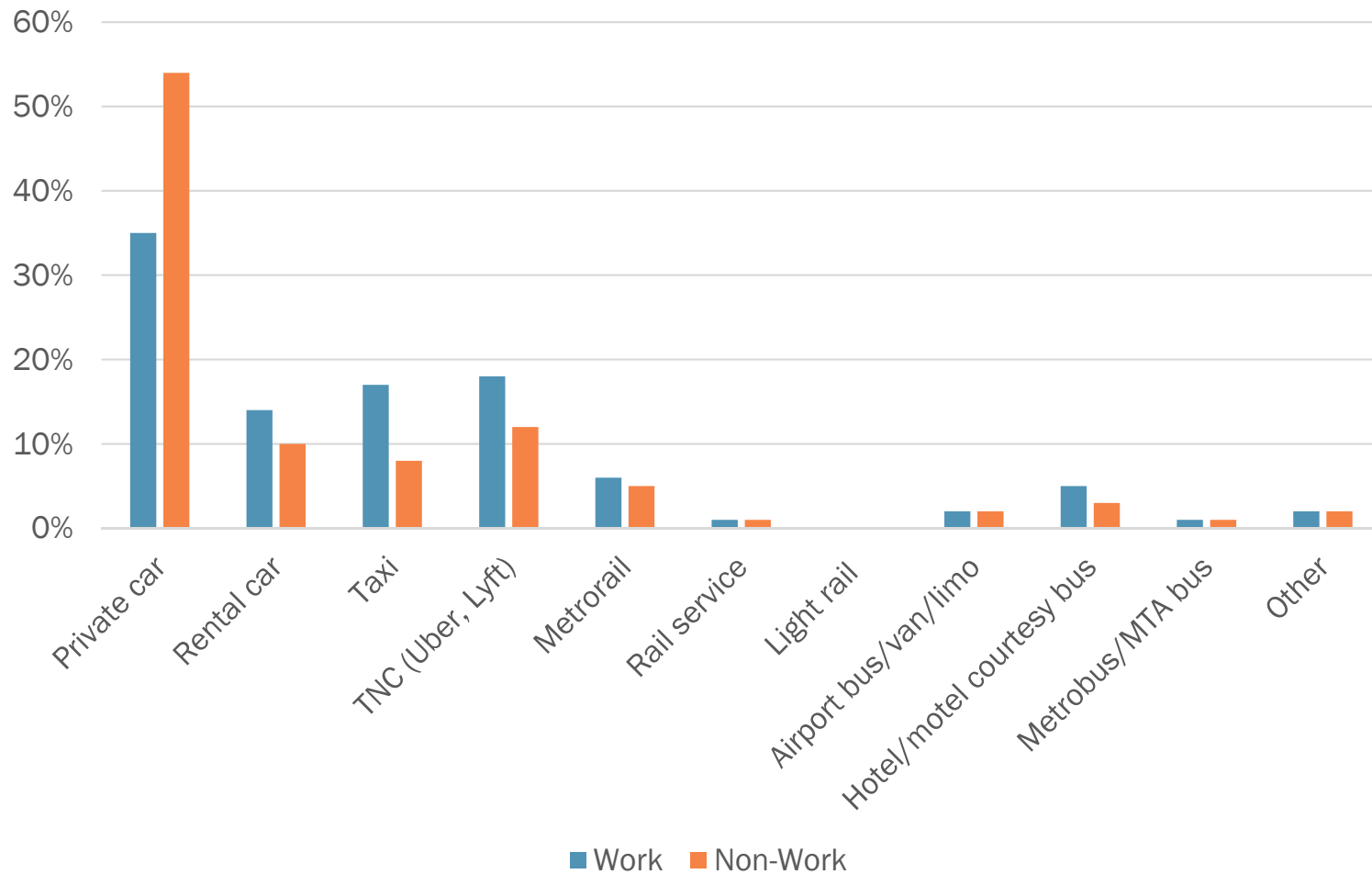
- The most common mode of access to airport continued to be the automobile (private car, rental car, Taxi, transportation networks) accounting for 84% of total trips to all airport.
- Metrorail usage at Reagan National increased to 13% from 12% in 2015
- Air passengers accessing the airport by Transportation 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 Ground Access



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

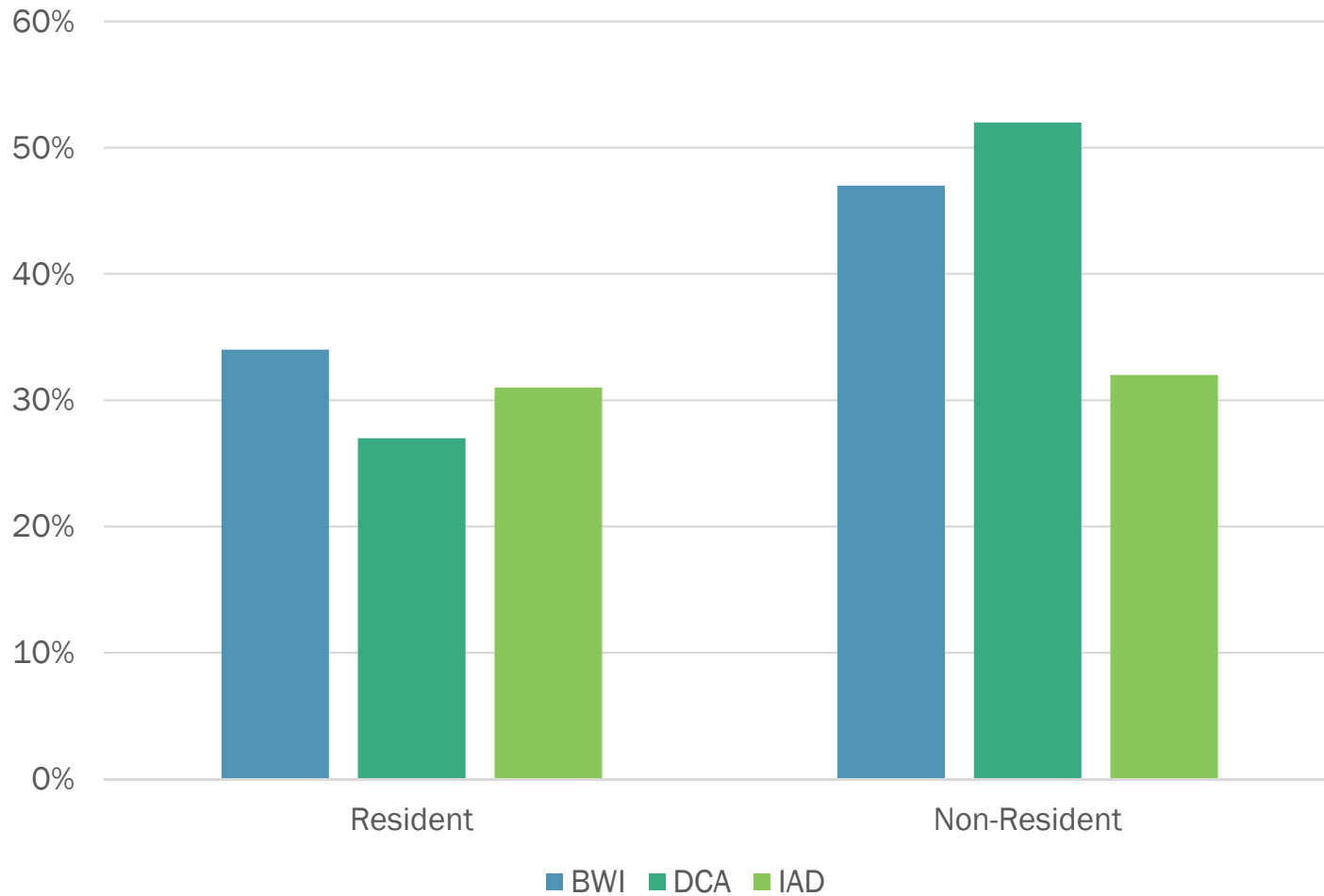


Air Traveler Characteristics

- In 2017, most 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.



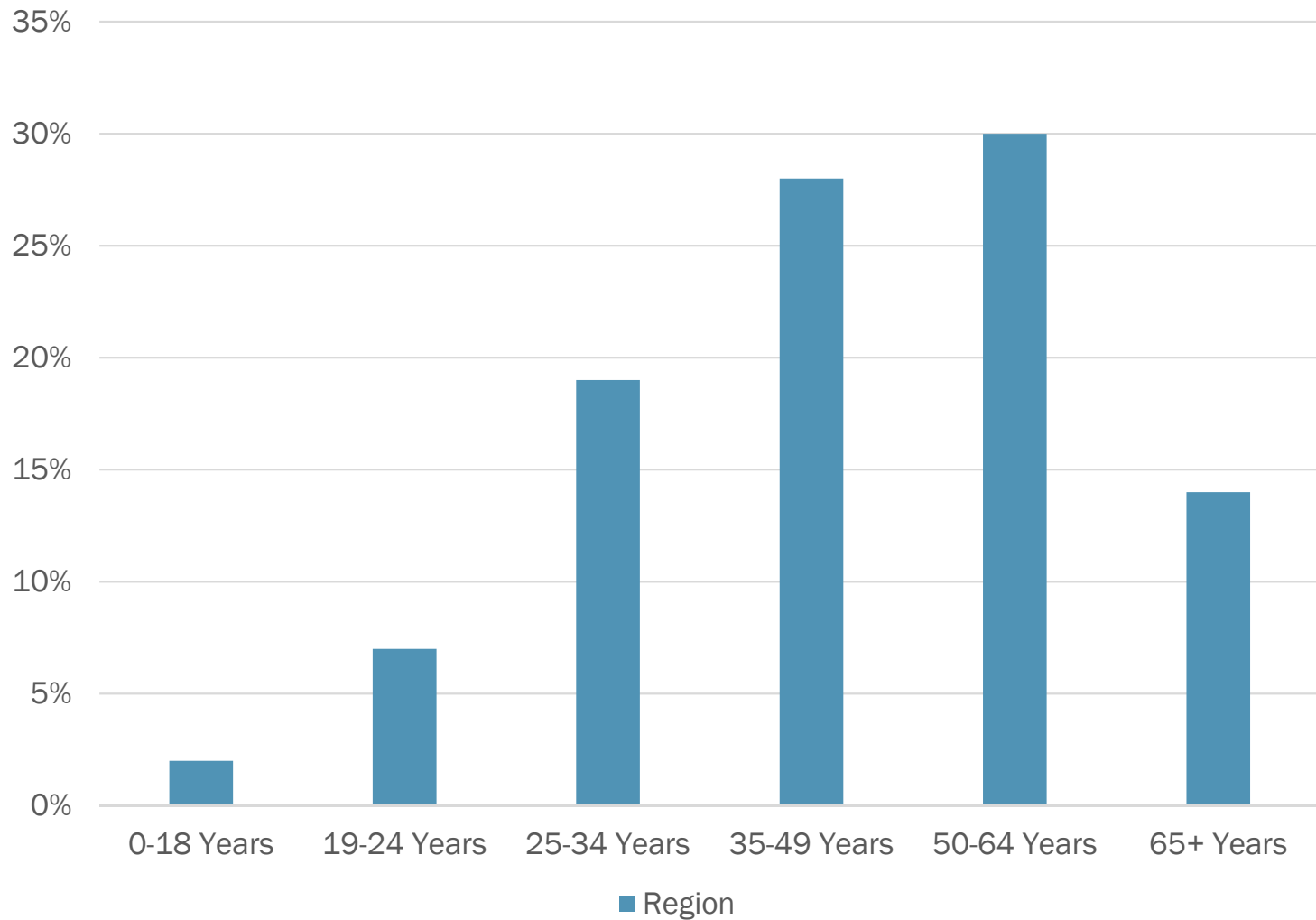
Annual Originating Air Passengers by Resident Status



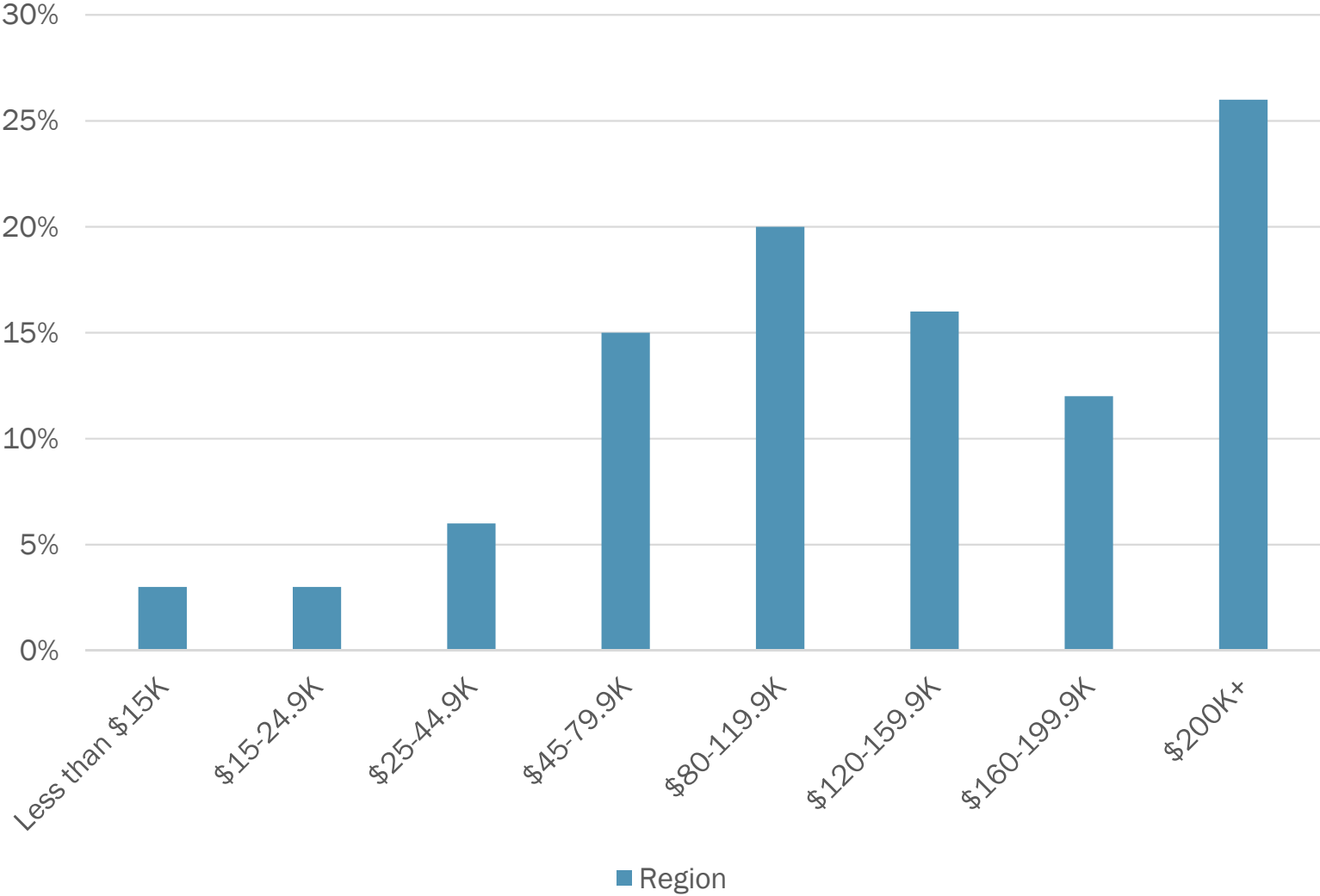
Note 1: "Unknown" not included



Annual Originating Air Passengers by Age



Annual Originating Air Passengers by Income



Next Steps

- Prepare FINAL General Findings Report: June 2018
- Geo-Coding survey file
- Prepare Geographic Findings Report



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