National Capital Region Transportation Planning Board

Aviation Technical Subcommittee
Highlights of the March 22, 2018 meeting (DRAFT May 16, 2018)

Meeting Attendees:
- Mark Rawlings (DDOT)
- Mike Hewitt (MWAA)
- Simon Mosbah (WSP)
- Tony Storck (BWI)
- Jeff Breeden (FAA)

TPB Staff:
- Tim Canan
- Arianna Koudounas
- Abdurahman Mohammed
- Jon Schermann

The meeting was called to order at 10:30 A.M.

1. WELCOME, INTRODUCTIONS, AND APPROVAL OF HIGHLIGHTS FROM PREVIOUS MEETING (NOVEMBER 16, 2017)

The highlights of the previous meeting were approved. The meeting summary will be posted on the COG website.

2. 2017 WASHINGTON-BALTIMORE REGIONAL AIR PASSENGER SURVEY: DRAFT GENERAL FINDINGS UPDATE

Ms. Koudounas and Mr. Roisman provided an update on the 2017 survey, including a full debriefing on field data collection activities, issues encountered, and lessons learned for the next survey.

Mr. Mohammed and Ms. Koudounas provided an update on the draft general findings of the 2017 Washington-Baltimore Regional Air Passenger Survey, including a full briefing on key takeaways, including response rate decline, transportation network company (TNC) mode share increase, and dominant travel purpose by airport. Discussions were also begun on possible modifications for the 2019 Washington-Baltimore Regional Air Passenger Survey.

Key findings of the 2017 survey were provided, including:

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 a great deal at BWI and DCA, and dropped substantially at IAD, when compared to originating enplanements
    - BWI: +25%
    - DCA: +29%
    - IAD: -1.4

Response Rate
- Survey response rates have declined significantly compared to APS 2015. The overall response rate has declined 3.5 percent, from 31% to 27.5%.
- While each airport's response rate decreased in 2017, the greatest change was seen at IAD – a 6.5 percent change from 2015 (33%) to 2017 (26.5%).

Dominant Travel Purpose by Airport
- BWI: Personal or Family, School or School-Related, and Local Business
- DCA: Federal, Local, and Other Business
- IAD: Vacation, and School or School-Related

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

Mode Share: Influence of Transportation Network Companies (TNC – such as Uber, Lyft)
- Survey response rates have declined significantly compared to APS 2015. The overall response rate has declined 3.5 percent, from 31% to 27.5%.
- While each airport's response rate decreased in 2017, the greatest change was seen at IAD – a 6.5 percent change from 2015 (33%) to 2017 (26.5%).

Trip Origin: Potential Influence of Airbnb and Related Companies
- Survey options for origin currently listed as:
  - Private residence
  - Hotel/Motel
  - Place of employment
  - Another place of business
  - Other
- There were increases in response rates for Private residence and Other when compared with 2015, while there was a decrease in Hotel/Motel. One likely theory for the cause of this trend, at least in part, is the emergence as private residence sharing companies like Airbnb. Subcommittee members discussed adding private residence sharing companies as an Origin response option in the 2019 survey.

Meeting attendees engaged in a rich discussion on possible improvements for the 2019 Air Passenger Survey, including phrasing changes concerning origin information (ie: whether to include an option for companies like Airbnb), and approaches for increasing the survey response rate. There was also discussion regarding the very low response rate for Section C Question 4 (83% non-respondents), and whether or not it should be included in the General Findings Report, as well as how it should be rephrased for the 2019 survey.

Next Steps: COG staff will share the Draft 2017 Washington-Baltimore Air Passenger Survey General Findings Report with subcommittee members prior to the May 24, 2018 subcommittee meeting. The 2017 APS General Findings Report will be finalized in June 2018.

3. CASP PROGRAM UPDATE

Ms. Koudounas updated the subcommittee on recent and future activities of the CASP program, including the next upcoming CASP 33 grant cycle.

4. VISUALIZE 2045 AIRPORT SYSTEMS ELEMENT

Ms. Koudounas provided the subcommittee with an overview of the newly rebranded long-range plan, Visualize 2045, including the 2018 timeline for its completion and release this fall. She also shared the Draft Airport Systems Element for Visualize 2045.

5. 2018 AVIATION TECHNICAL SUBCOMMITTEE CHAIR AND MEETING SCHEDULE

Ms. Koudounas led a brief discussion on subcommittee meeting dates and locations for the remainder of the year. MWAA and MAA representatives offered to host meetings as needed, with COG's upcoming office refresh scheduled for later this year. For now the dates will remain as agreed upon, but locations may be subject to change this fall, depending on COG's office refresh schedule.

6. ROUNDTABLE DISCUSSION

Mr. Storck shared that the BWI updated economic analysis study, *Regional Economic Impact of BWI Marshall Airport, December 2017,* was recently released. It can be viewed [here](#).

7. OTHER BUSINESS

Mr. Mohammed asked whether it would be of value to present the upcoming General Findings report to airline managers or airport planning staff. Mr. Storck agreed that it would be more valuable to share with airport planning staff than with airline managers.

Mr. Mosbah, a consultant with WSP conducting a Transportation Research Board (TRB) study on collaboration between airports and Metropolitan Planning Organizations, provided context for the study, and requested both MWAA and MAA's participation in the survey. Mr. Mosbah also indicated that among the case studies they are drafting, they are looking for a state-owned airport as a case study (which BWI is). As such, Mr. Storck and Mr. Mosbah made plans to coordinate on this effort following the meeting.

8. ADJOURN

The meeting was adjourned at 11:50 P.M. The next subcommittee meeting is Thursday, May 24, 2018, by WebEx.