Bay Area Airport Survey Results

Presented to:
Regional Airport Planning Committee
March 27, 2009

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Primary Research Objectives

- Assess regional priorities related to general planning issues as well as those related specifically to airports;
- Evaluate airport usage over the past 12 months and satisfaction with characteristics of users' primary airport;
- Determine views regarding airport expansion;
- Assess support for a variety of strategies to deal with anticipated future demand for Bay Area flights; and
- Identify residents most preferred strategy.

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Methodology

- Telephone & Internet Survey Methodology
  - Stratified and Clustered Sample of an Expanded Likely Voter Universe in the Nine-County Bay Area (3.6 million)
  - Representative Sampling by County
  - 2,000 Likely Voters Completed a Survey (1,800 Phone; 200 Internet)
  - Offered in English, Spanish and Cantonese
  - Survey Length: 15 minutes
  - Field Dates: February 4 through 17, 2009
  - Margin of Error: +/- 2.2% (95% level of confidence)

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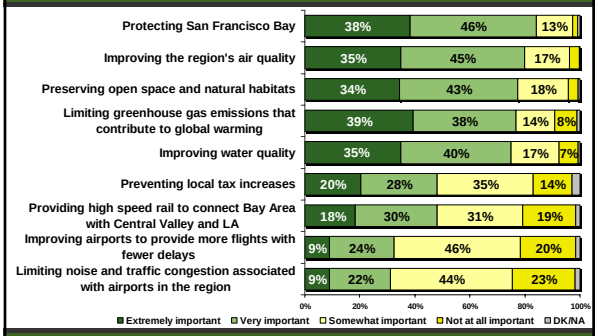
Regional Priorities



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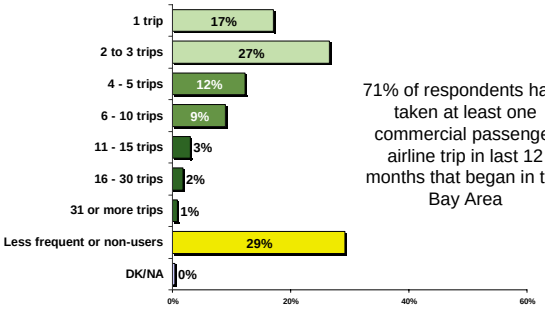
Bay Area Airport Usage: Last 12 Months



71% of respondents have taken at least one commercial passenger airline trip in last 12 months that began in the Bay Area

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Airport User Profiles (Flown in Last 12 Months)

- Among the 71% who have taken a commercial flight in the last 12 months that began in the Bay Area:
  - 64% flew primarily for leisure, 15% primarily for business, and 21% an even balance between the two
  - 46% flew out of SFO, 31% OAK, and 20% SJC
  - 60% flew out of more than one Bay Area airport during the past year
  - 38% flew into a Los Angeles area airport during the last 12 months.

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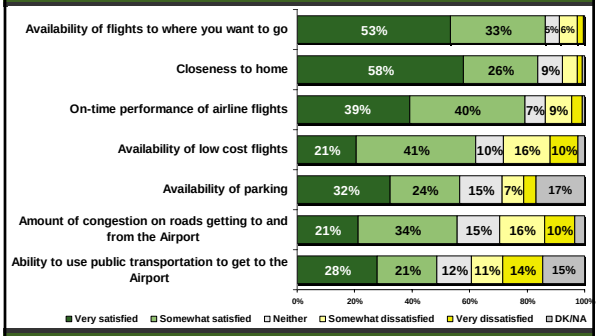
Satisfaction with Aspects of Primary Airport



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Satisfaction by Primary Airport

- Compared with those who mostly flew out of Oakland or San Francisco, those who mostly flew out of **San Jose** were more satisfied with:
  - Closeness to home and
  - Congestion on roads getting to and from the Airport.
- Compared with those who mostly flew out of Oakland or San Jose, those who mostly flew out of **SFO** were:
  - More satisfied with their ability to use public transportation to get to the Airport, but
  - Less satisfied with on-time performance of airline flights and the availability of low costs flights.

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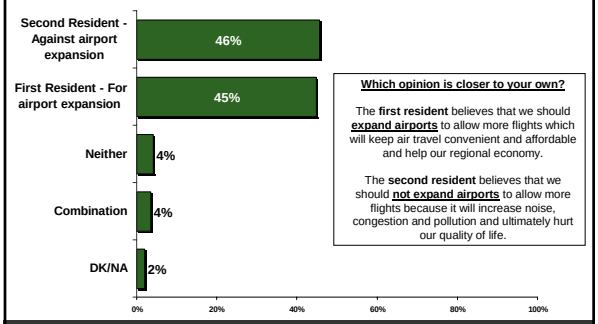
Views on Future of Airports in Region



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Views on Future of Airports in Region by Sub Groups

- Respondents who hadn't flown out of a Bay Area airport in the past year or who had only flown once were more likely to oppose airport expansion - those who had flown twice or more were more likely to support expansion.
- Respondents who mostly flew out of San Jose were more supportive (56%) than those who mostly flew out of Oakland (46%) or San Francisco (44%).
- The majority of men supported airport expansion, whereas the majority of women opposed it.
- As household income increased, so did support for airport expansion.

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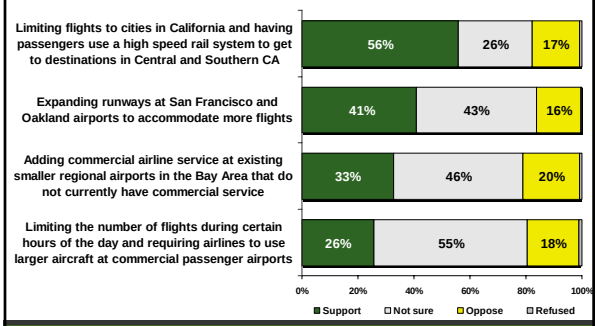
Support for Strategies to Deal with Anticipated Demand for Bay Area Flights



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Supporters: Limiting Flights and Using High Speed Rail to get to Central and Southern California

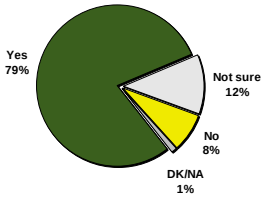
Initial Support was Highest Among the following Sub-Groups:

- Residents who mostly flew out of San Francisco (SFO);
- Renters.

Initial Opposition was Highest Among the following Sub-Groups:

- Primarily business travelers;
- Those who flew out of Bay Area 16 or more times during past year;
- Those who made $100k or more;
- Men;
- Napa county residents.

Still support limiting flights to cities in California if knew high speed rail would cost about the same as air but would take two and a half hours to get to Southern California?



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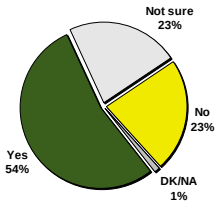
Supporters: Expanding Runways at SFO & OAK

Initial Support was Highest Among the following Sub-Groups:

- Residents who flew out of the Bay Area six or more times during the past year;
- Those who flew primarily for business;
- Those who flew into a Los Angeles area airport in the past year;
- Residents with a household income of $150,000 or more;
- Male respondents.

Still support expanding runways if knew it would require filling in parts of the Bay?



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Supporters: Adding Service at Existing Smaller Regional Airports

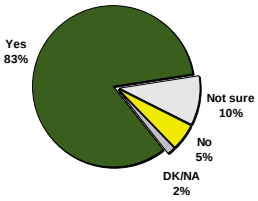
Initial Support was Highest Among the following Sub-Groups:

- Residents who mostly flew out of Oakland or San Francisco airports;
- Residents of Sonoma, Solano, and Marin counties.

Initial Opposition was Highest Among the following Sub-Groups:

- Residents who mostly flew out of San Jose;
- Homeowners;
- Households that made $75,000 or more a year.

Still support adding service if knew it would be added to airports such as Santa Rosa, Napa, Concord, Livermore, Travis Air Force Base, or Moffett Federal Airfield?



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Supporters: Limiting Flights and Requiring Airlines to Use Larger Aircraft

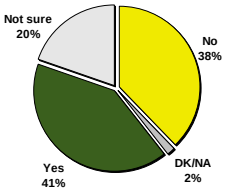
Initial Support was Highest Among the following Sub-Groups:

- Renters;
- Those who traveled primarily for leisure or an even balance between business and leisure;
- Residents under 50 years of age.

Initial Opposition was Highest Among the following Sub-Groups:

- Those who took six or more Bay Area flights in the past year;
- Income of $150k or more;
- Male respondents.

Still support limiting flights at certain hours of the day if you knew it would be harder to find flights at the times you wanted and increased the cost of flying?



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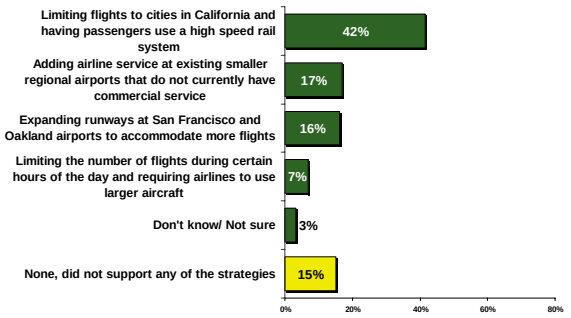
Strategy that Should be Highest Priority



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Conclusions

- Among voters in the Bay Area, issues related to airport access and capacity had a relatively low level of importance and awareness compared to more general planning priorities.
- Those voters that have flown in the last 12 months were relatively satisfied with their primary airports availability of flights, closeness to home and on-time performance while less satisfied with congestion around the airports and availability of public transit to the airport.
- Voters were evenly mixed between expanding airports vs. stopping the expansion of airports. These views were connected to airport usage, income and gender.

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Conclusions II

- Voters were most supportive of high speed rail initially as an option to improve airport capacity and after hearing more information remained the most popular strategy of the scenarios that were evaluated.
- Voters were initially least supportive of limiting flight times and requiring larger aircraft of the four scenarios that were tested. This scenario is the least understood by voters and is reflected in the relatively low support.

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