



Bay Area Airport Survey Report

Presented to the Regional Airport Planning Committee

April 2009



TABLE OF CONTENTS

| | |
|---|-----|
| List of Figures..... | ii |
| List of Tables..... | iii |
| Executive Summary | 1 |
| Introduction to the Study..... | 1 |
| Methodology Overview | 1 |
| Key Findings | 2 |
| Regional Priorities..... | 4 |
| Bay Area Airport Usage: Last 12 Months..... | 6 |
| Profiles: Bay Area Airport Use in Last 12 Months | 9 |
| Primary Trip Purpose..... | 9 |
| Airports Used..... | 12 |
| Trips to Los Angeles Area Airports | 15 |
| Satisfaction with Aspects of Primary Airport..... | 18 |
| Views on Future of Airports in Region..... | 21 |
| Support for Strategies to Deal with Anticipated Demand for Bay Area Flights | 24 |
| Follow-Up Questions..... | 33 |
| Limiting Flights and Using High Speed Rail to get to Central and Southern California | 33 |
| Expanding Runways at San Francisco and Oakland Airports to Accommodate More Flights | 36 |
| Adding Service at Existing Smaller Regional Airports | 39 |
| Limiting Flights and Requiring Airlines to Use Larger Aircraft..... | 42 |
| Highest Priority..... | 45 |
| Methodology..... | 48 |
| Appendix A: Toplines | A-1 |

LIST OF FIGURES

| | |
|---|----|
| Figure 1 Regional Priorities..... | 4 |
| Figure 2 Bay Area Airport Use in Last 12 Months..... | 6 |
| Figure 3 Primary Trip Purpose | 9 |
| Figure 4 Bay Area Airports Used in Last 12 Months | 12 |
| Figure 5 Flown into Los Angeles Area Airports in Last 12 Months | 15 |
| Figure 6 Satisfaction with Aspects of Primary Airport | 18 |
| Figure 7 Views on Future of Airports in Region | 21 |
| Figure 8 Support for Strategies to Deal with Anticipated Demand for Bay Area Flights..... | 24 |
| Figure 9 Supporters: Still Support if Knew Would Cost the Same and Take 2.5 Hours..... | 33 |
| Figure 10 Opposition: Biggest Concerns about Limiting Flights and Using High Speed Rail..... | 35 |
| Figure 11 Supporters: Still Support if Knew | 36 |
| Figure 12 Opposition: Biggest Concerns about Expanding Runways at SFO and OAK | 38 |
| Figure 13 Supporters: Still Support if Knew | 39 |
| Figure 14 Opposition: Biggest Concerns about Adding Service at Smaller Regional Airports | 41 |
| Figure 15 Supporters: Still Support if Knew | 42 |
| Figure 16 Opposition: Biggest Concerns about Limiting Flights and Using Larger Aircraft | 44 |
| Figure 17 Strategy that Should be the Highest Priority | 45 |

LIST OF TABLES

| | |
|---|----|
| Table 1 Bay Area Airport Use in Last 12 Months by Geographic Area | 7 |
| Table 2 Primary Trip Purpose by Geographic Area | 10 |
| Table 3 Primary Airport by Geographic Area | 13 |
| Table 4 Flown into Los Angeles Area Airports in Last 12 Months by Geographic Area.. | 16 |
| Table 5 Satisfaction by Primary Airport..... | 19 |
| Table 6 Satisfaction by Geographic Area..... | 20 |
| Table 7 Views on Future of Airports in Region by Geographic Area..... | 22 |
| Table 8 Support Limiting Flights and Using High Speed Rail by Geographic Area | 25 |
| Table 9 Support Expanding Runways by Geographic Area..... | 26 |
| Table 10 Support Adding Service at Smaller Airports by Geographic Area..... | 27 |
| Table 11 Support Limiting Flights and Using Larger Aircraft by Geographic Area..... | 28 |
| Table 11 Strategy that Should be the Highest Priority by Geographic Area | 46 |
| Table 12 Overview of Project Methodology | 48 |

EXECUTIVE SUMMARY

INTRODUCTION TO THE STUDY

The survey research detailed in this report is part of a larger update to the Regional Airport Planning Committee's Regional Airport Systems Plan Analysis, which is the Bay Area's regional planning document for air travel in the region. The Regional Airport Planning Committee is headed by three member agencies- the Association of Bay Area Governments, the Bay Conservation and Development Commission, and the Metropolitan Transportation Commission.

The purpose of the update to the Regional Airport Systems Plan Analysis is to analyze a variety of alternatives for responding to the region's future air travel demand and the purpose of the survey was to gauge public opinion and knowledge about these alternatives. The alternatives included high speed rail, using pricing and airplane size to reduce congestion at the airports at peak periods, dispersing commercial air service to alternative airports, and increasing capacity at San Francisco International, Oakland International, and San Jose International Airports.

SH&E, an ICF International Company, partnered with BW Research Partnership, Inc. (BW Research) to conduct the survey of Bay Area voters for the Regional Airport Planning Committee. The main research objectives of the study were to:

- 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.

METHODOLOGY OVERVIEW

The survey was administered from February 4 through 17, 2009 via telephone (in English, Spanish, and Cantonese) and via the web (in English) and averaged 15 minutes in length. A stratified and clustered sample of an expanded likely voter universe in the nine-county Bay Area served as the sampling universe for the study and representative sampling was achieved by county.

In total, 1,790 voters completed a telephone survey and 210 completed a web survey (the same questions were utilized in both formats). Overall, a statistically representative sample of 2,000 voters 18 years and older completed a survey, resulting in a maximum margin of error +/- 2.19 percent (at the 95 percent level of confidence) for questions answered by all 2,000 respondents.

KEY FINDINGS

Based on the analysis of the survey data, BW Research is pleased to present the Regional Airport Planning Committee with the following key findings. Please refer to the body of the report for a more comprehensive analysis of findings, including comparisons among sub-groups.

- “Protecting San Francisco Bay” was rated as the most important issue facing Bay Area residents (84% “Extremely” plus “Very important”) followed by “Improving the region’s air quality” (80%).
- Seventy-one percent of Bay Area voters have flown out of the Bay Area at least once in the last 12 months.
- Among those who had flown out of the Bay Area in the past year (1,409 respondents):
 - Sixty-four percent flew primarily for leisure, 15 percent flew primarily for business, and 21 percent cited an even balance between the two.
 - Forty-six percent flew mostly out of San Francisco International Airport (SFO), 31 percent flew mostly out of Oakland International Airport (OAK), and 20 percent flew mostly out of San Jose International Airport (SJC).
 - Fifty-nine percent of respondents who took a commercial flight in the past 12 months flew out of more than one Bay Area airport.
 - Overall, 38 percent of respondents who took a commercial passenger flight out of the Bay Area in the last 12 months flew into a Los Angeles area airport during the past year.
 - When considering their primary airport, respondents were most satisfied with:
 - Availability of flights to where you want to go (86% satisfaction);
 - Closeness to home (84% satisfaction); and
 - On-time performance of airline flights (79% satisfaction).
- All survey respondents were presented with the opinions of two Bay Area residents who disagree about the future of airports in the region.
 - The first resident believes that we should expand airports to allow more flights which will keep air travel convenient and affordable and help our regional economy.
 - The second resident believes that we should not expand airports to allow more flights because it will increase noise, congestion, and pollution and ultimately hurt our quality of life.
- Respondents were evenly split on the opinion closest to their own. Forty-six percent of respondents agreed with the second resident and were against airport expansion and 45 percent agreed with the first resident and were in favor of airport expansion.

- When asked whether they would support or oppose four different strategies being considered to deal with the need for increased capacity for commercial passenger airline flights in the Bay Area anticipated over the next 10 to 20 years:
 - The majority of respondents would support “Limiting flights to cities in California and having passengers use a high speed rail system to get to destinations in Central and Southern California” (56%), 26 percent were not sure, and 17 percent were opposed.
 - Forty-one percent of respondents would support “Expanding runways at San Francisco and Oakland airports to accommodate more flights,” 43 percent were not sure, and 16 percent opposed when initially asked.
 - One in three respondents supported “Adding commercial airline service at existing smaller regional airports in the Bay Area that do not currently have commercial service.”
 - One in four would support “Limiting the number of flights during certain hours of the day and requiring airlines to use larger aircraft at commercial passenger airports.”
- Of the four options presented, 42 percent of respondents felt that limiting flights to cities in California and having passengers use a high speed rail system to get to destinations in Central and Southern California should be the highest priority.

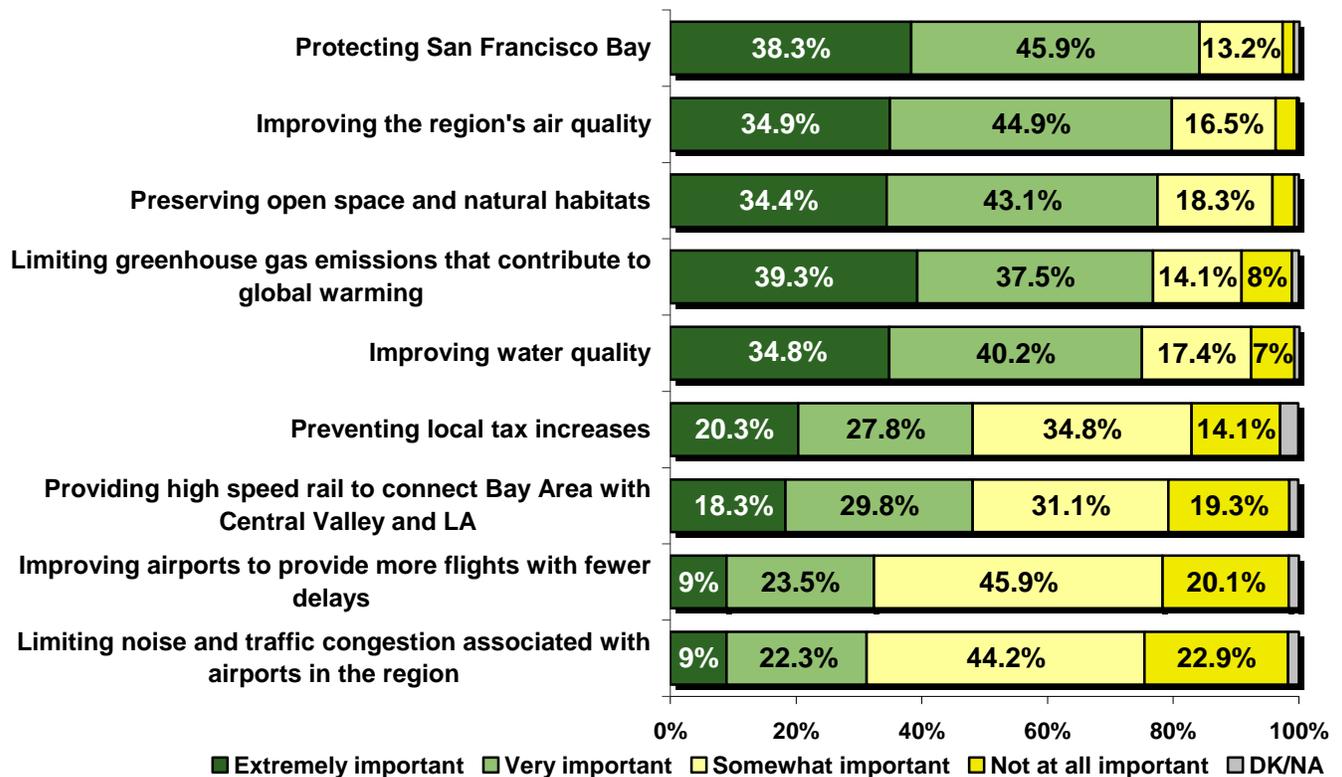
For additional detail on the research findings and a complete assessment of the survey results, please proceed to the body of the report beginning on the next page.

REGIONAL PRIORITIES

The first substantive question of the survey presented respondents with nine issues facing Bay Area residents and asked them to rate the importance of each issue to them personally. “Protecting San Francisco Bay” was rated as the most important (84% “Extremely” plus “Very important”) followed by “Improving the region’s air quality” (80%), “Preserving open space and natural habitats” (78%), “Limiting greenhouse gas emissions that contribute to global warming” (77%), and “Improving water quality” (75%). Each of these issues was rated as “Extremely” or “Very important” by approximately three out of four Bay Area voters.

“Preventing local tax increases” and “Providing high speed rail that connects the Bay Area to Central Valley and Los Angeles” were tied in importance at 48 percent. Each of the remaining two airport-related issues “Improving airports to provide more flights with fewer delays” (32%) and “Limiting the noise and traffic congestion associated with airports in the region” (31%) were viewed as less important than “Preventing local tax increases.”

Figure 1 Regional Priorities



Throughout this report, analyses of respondent sub-groups will be presented in text boxes. To follow is an examination of voters’ priorities by the many demographic and behavioral sub-groups examined in the study.

- Respondents who had flown out of a Bay Area airport during the past year rated “Providing high speed rail that connects the Bay Area to Central Valley and Los Angeles” as higher in importance than those who had not flown in the past year (50% vs. 44%). Further, the importance level placed on providing high speed rail increased as the number of flights out of the Bay Area in the past year increased.
- Respondents who had flown into Los Angeles during the past year placed a much higher level of importance on “Providing high speed rail that connects the Bay Area to Central Valley and Los Angeles” than those who had not flown into Los Angeles in the past year.
- Compared with voters in other counties, a higher percentage of San Francisco County voters rated “Providing high speed rail that connects the Bay Area to Central Valley and Los Angeles” as important.
- Compared with those in other counties, Solana County respondents were the most likely to rate “Preventing local tax increases” as important (67%).
- Santa Clara County residents rated “Protecting San Francisco Bay” lower in importance than residents in other areas (79% vs. 86%).
- Solano, Alameda, and San Mateo county residents rated “Limiting the noise and traffic congestion associated with airports in the region” statistically higher than residents in other counties.
- Those who had not flown out of the Bay Area in the past year rated “Preventing local tax increases,” “Improving water quality,” and “Limiting the noise and traffic congestion associated with airports in the region” higher in importance than those who had flown in the past year.
- Compared with respondents who flew mostly out of Oakland or San Francisco airports, those who flew mostly out of San Jose place a lower level of importance on each of the following:
 - Protecting San Francisco Bay;
 - Preserving open space and natural habitats;
 - Limiting greenhouse gas emissions that contribute to global warming;
 - Improving water quality; and
 - Providing high speed rail that connects the Bay Area to Central Valley and Los Angeles.
- Respondents with a total household income under \$75,000 a year placed a higher importance level on “Preventing local tax increases” than respondents earning \$75,000 or more per year (52% vs. 43%).
- Females placed a higher importance level across the items than men.
- With the exceptions of “Preventing local tax increases” and “Improving the Bay Area’s commercial passenger airports to provide more flights with fewer delays,” Democrats provided higher importance ratings than Republicans.

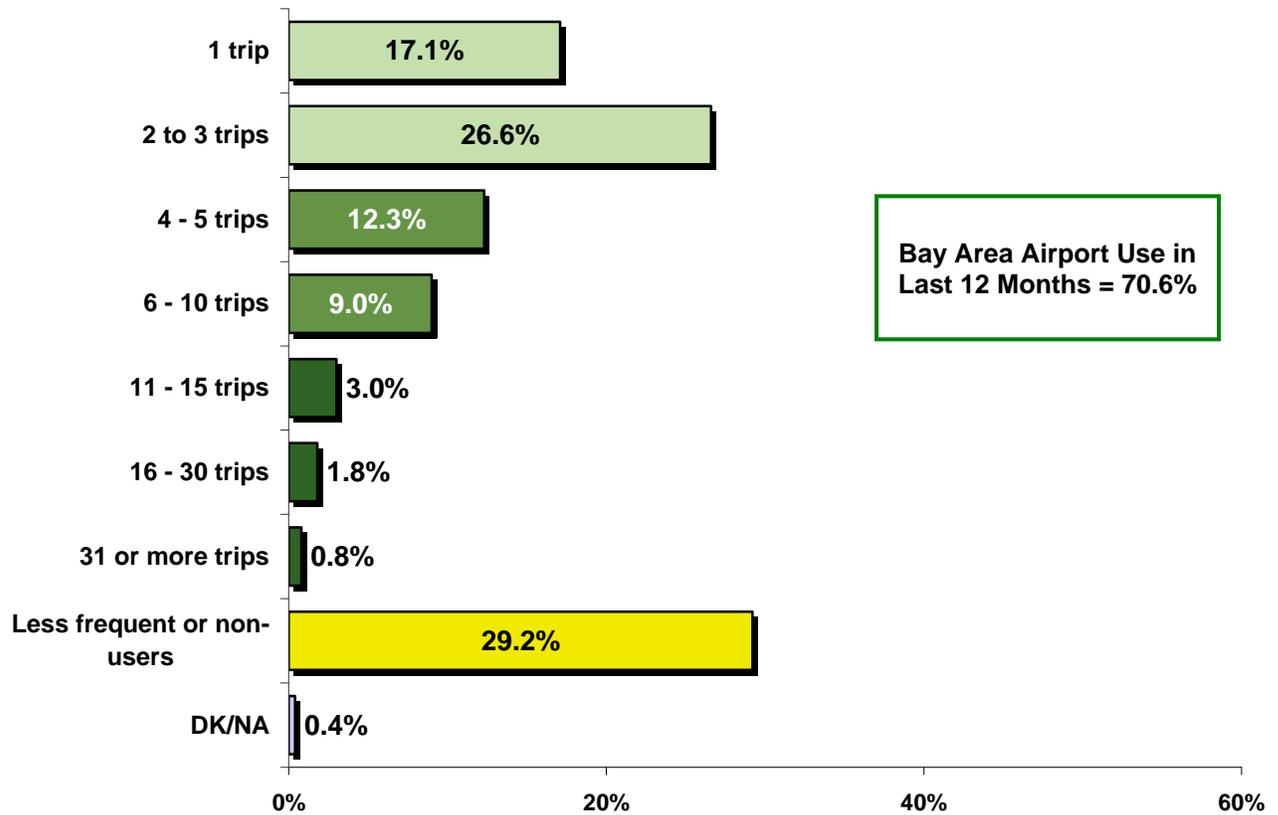
BAY AREA AIRPORT USAGE: LAST 12 MONTHS

Respondents were next asked how many commercial passenger airline trips they had taken in the last 12 months that began in the Bay Area¹.

Overall, 71 percent of Bay Area voters have flown out of the Bay Area at least once in the last 12 months.

Specifically, 44 percent of respondents had taken three trips or less, 21 percent flew out of the Bay Area four to 10 times, and six percent had taken more than 10 trips. Twenty-nine percent of respondents had not taken a trip in the past 12 months and were classified as “Less frequent or non-users.”

Figure 2 Bay Area Airport Use in Last 12 Months



¹ Respondents were instructed to count each round-trip flight as one trip

The table below displays the number of flights taken out of the Bay Area in the past year by geographic area.

Seventy-eight percent of Peninsula voters, 73 percent of South Bay voters, 70 percent of East Bay voters, and 60 percent of North Bay voters had flown out of the Bay Area in the past year.

Peninsula residents were the most likely to have flown out of a Bay Area airport six or more times in the past year (23%) and North Bay residents were the least likely (9%).

Table 1 Bay Area Airport Use in Last 12 Months by Geographic Area²

| | Geographic Area | | | |
|------------------------------------|--------------------------|--------------------------|-------------------------|------------------------|
| | A. North Bay | B. Peninsula | C. East Bay | D. South Bay |
| Base | 368 | 477 | 722 | 433 |
| 1 trip | 20% | 15% | 18% | 15% |
| 2 - 3 trips | 25% | 25% | 26% | 30% |
| 4 - 5 trips | 7% BCD | 15% A | 12% A | 15% A |
| 6 or more trips | 9% BC | 23% ACD | 13% AB | 12% B |
| Flew in past year | 60% BCD | 78% AC | 70% AB | 73% A |
| Have not flown in past year | 40% BCD | 21% AC | 30% AB | 27% A |
| DK/NA | 0% | 1% | 0% | 0% |

² North Bay = Marin, Napa, Solano, and Sonoma counties; Peninsula = San Francisco and San Mateo counties; East Bay = Alameda and Contra Costa counties; South Bay = Santa Clara County.

Statistically significant differences by geographic area are denoted by letters. For example, a “B” in a cell in Column A indicates that the North Bay (“A”) is statistically different than the Peninsula (“B”) with regard to that particular response.

Below are the highlights from the analysis of flying out of a Bay Area airport in the past year by sub-groups.

- A higher proportion of White (73%) and Asian (72%) respondents had flown out of the Bay Area in the last year compared with African American or Black (57%) and Latino(a) or Hispanic (61%) respondents.
- The number of trips taken in the past 12 months was strongly correlated to household income. Forty-three percent of respondents with a household income under \$25,000 a year had flown out of the Bay Area in the past year compared with 89 percent of those earning \$150,000 or more per year.
- Respondents who primarily flew out of San Francisco International Airport were the most likely to have taken six or more flights out of the Bay Area in the past year (SFO: 23%; SJC: 20%; OAK: 18%).
- Respondents living in San Francisco (78%), San Mateo (78%), Marin (74%), Santa Clara (73%), Alameda (71%), and Contra Costa (68%) counties were more likely to have flown out of the Bay Area in the past year than those living in Solano (51%), Napa (56%), and Sonoma (60%) counties.
 - Respondents living in San Francisco County took the most trips overall.
- Respondents 65 and older were much less likely than those 64 and younger to have taken a trip in the past year (57% vs. 74%); and respondents 30 to 49 were the most likely (78%).
- Most likely related to age, respondents who regularly commuted to work or school were more likely to have flown out of the Bay Area in the past year than those who did not commute.
- As one might expect, respondents who flew primarily for business flew more frequently than those who flew primarily for leisure or for both business and leisure.
- No statistically significant differences were found in whether or not respondents had flown in the past year by presence of children in the household, homeownership status, or gender.

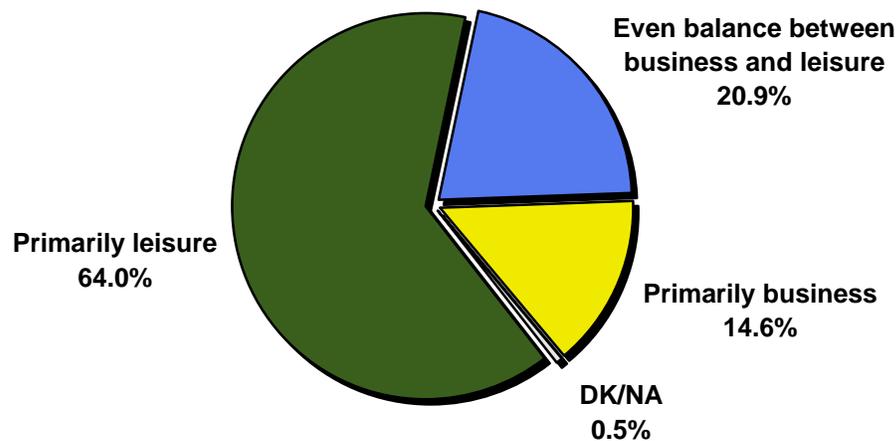
PROFILES: BAY AREA AIRPORT USE IN LAST 12 MONTHS

This section of the report focuses on the 71 percent of Bay Area voters (1,409 respondents) who flew out of a Bay Area airport at least once during the past year.

PRIMARY TRIP PURPOSE

Sixty-four percent of respondents who took a commercial passenger flight in the last 12 months that originated in the Bay Area flew primarily for leisure, 15 percent flew primarily for business, and 21 percent cited an even balance between the two.

Figure 3 Primary Trip Purpose



There were no statistically significant differences in primary trip purpose by respondents' geographic area of residence.

Table 2 Primary Trip Purpose by Geographic Area³

| | Geographic Area | | | |
|--|-----------------|--------------|-------------|--------------|
| | A. North Bay | B. Peninsula | C. East Bay | D. South Bay |
| Base | 221 | 372 | 502 | 314 |
| Primarily leisure | 69% | 62% | 62% | 67% |
| Even balance between business and leisure air traveling | 17% | 22% | 21% | 22% |
| Primarily business | 14% | 15% | 17% | 11% |
| DK/NA | 0% | 0% | 1% | 0% |

³ North Bay = Marin, Napa, Solano, and Sonoma counties; Peninsula = San Francisco and San Mateo counties; East Bay = Alameda and Contra Costa counties; South Bay = Santa Clara County.

Statistically significant differences by geographic area are denoted by letters. For example, a "B" in a cell in Column A indicates that the North Bay ("A") is statistically different than the Peninsula ("B") with regard to that particular response.

Below are the highlights from the analysis of trip purpose by sub-groups.

- Household income was positively correlated with primarily traveling for business, such that the percentage of respondents who traveled for business increased as household income increased.
- Respondents living in Sonoma and Solano counties were the most likely to travel primarily for leisure.
- The number of trips taken was strongly related to traveling primarily for business. Sixty-three percent of respondents who flew out of the Bay Area 11 or more times in the past year flew primarily for business, 25 percent for both business and leisure, and 12 percent primarily for leisure.
- Business travelers were also much more likely to have flown into Los Angeles during the past year than leisure travelers.
- Respondents 40 to 49 years old were more likely than those in other age groups to primarily travel for business.
- A higher percentage of men primarily traveled for business than women (21% vs. 11%).
- Respondents who regularly commuted to work or school and had flown in the past year were more likely to travel primarily for business than those who did not commute (17% vs. 10%).
- A higher percentage of respondents with children traveled primarily for business compared to those without children (19% vs. 12%).
- No statistically significant differences were found for trip purpose by primary airport, ethnicity, or homeownership status.

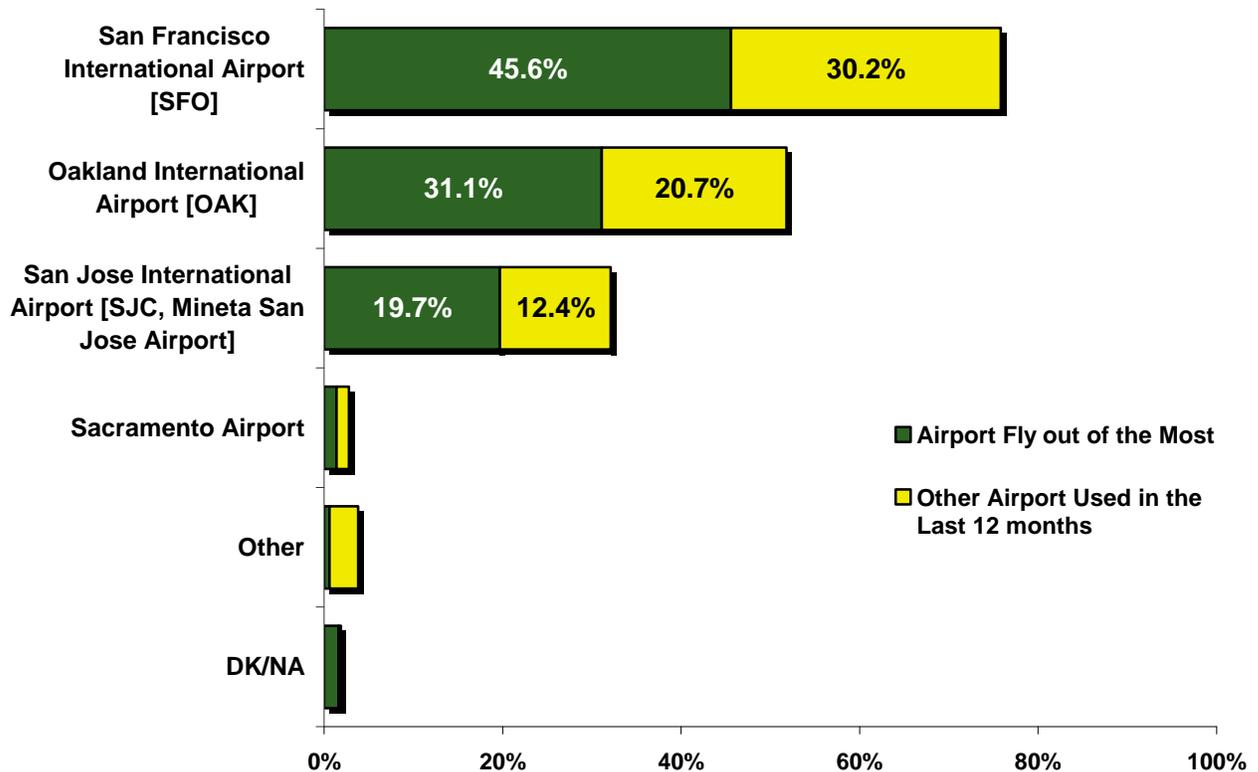
AIRPORTS USED

Forty-six percent of respondents who flew out of the Bay Area in the past year flew mostly out of San Francisco International Airport (SFO), 31 percent flew mostly out of Oakland International Airport (OAK), and 20 percent flew mostly out of San Jose International Airport (SJC).

Overall, 59 percent of respondents who took a commercial flight in the past 12 months flew out of more than one Bay Area airport.

In total, 76 percent of respondents who took a commercial flight in the past 12 months flew out of SFO, 52 percent out of OAK, 32 percent out of SJC, three percent out of Sacramento Airport, and four percent used another airport in the region.

Figure 4 Bay Area Airports Used in Last 12 Months



The table below displays respondents' primary airport by their geographic area of residence.

East Bay residents were the most likely to primarily fly out of Oakland (66%), South Bay respondents were the most likely to primarily fly out of San Jose (73%), and Peninsula residents were the most likely to primarily fly out of San Francisco (89%).

Table 3 Primary Airport by Geographic Area⁴

| | Geographic Area | | | |
|--|--------------------|--------------------|--------------------|--------------------|
| | A. North Bay | B. Peninsula | C. East Bay | D. South Bay |
| Base | 221 | 372 | 502 | 314 |
| Oakland International Airport [OAK] | 38% BCD | 6% ACD | 66% ABD | 1% ABC |
| San Jose International Airport [SJC, Mineta San Jose Airport] | 2% D | 4% D | 5% D | 73% ABC |
| San Francisco International Airport [SFO] | 47% BCD | 89% ACD | 27% AB | 24% AB |
| Sacramento Airport | 9% BCD | - A | 0% A | - A |
| Other | 2% | 0% | 0% | 0% |
| DK/NA | 2% | 1% | 2% | 2% |

⁴ North Bay = Marin, Napa, Solano, and Sonoma counties; Peninsula = San Francisco and San Mateo counties; East Bay = Alameda and Contra Costa counties; South Bay = Santa Clara County. Statistically significant differences by geographic area are denoted by letters. For example, a “B” in a cell in Column A indicates that the North Bay (“A”) is statistically different than the Peninsula (“B”) with regard to that particular response.

Below are the highlights from the analysis of primary airport by sub-groups.

- The majority of respondents who had taken six or more flights out of the Bay Area during the past year flew primarily out of SFO.
- Respondents who had flown into Los Angeles during the past year were more likely to have flown out of Oakland. There were no statistically significant differences in whether or not respondents had flown to LA among those who primarily flew out of SFO or SJC.
- Alameda and Contra Costa county residents were the most likely to primarily fly out of Oakland. Santa Clara County respondents were the most likely to fly mostly out of San Jose. San Francisco and San Mateo county residents were the most likely to primarily fly out of San Francisco.
- Respondents who normally took public transportation to work or school were more likely to primarily fly out of San Francisco than those who typically drove alone (63% vs. 43%).
- A higher percentage of those who normally drove alone flew out of San Jose as compared with those who took public transportation (23% vs. 10%).
- A higher proportion of renters flew out of SFO than owners (55% vs. 41%). Comparatively, a higher proportion of owners flew out of OAK and SJC as compared with renters.
- The majority of respondents under 40 years of age flew out of SFO.
- No statistically significant differences were found by trip purpose, commute status, household income, or gender.

TRIPS TO LOS ANGELES AREA AIRPORTS

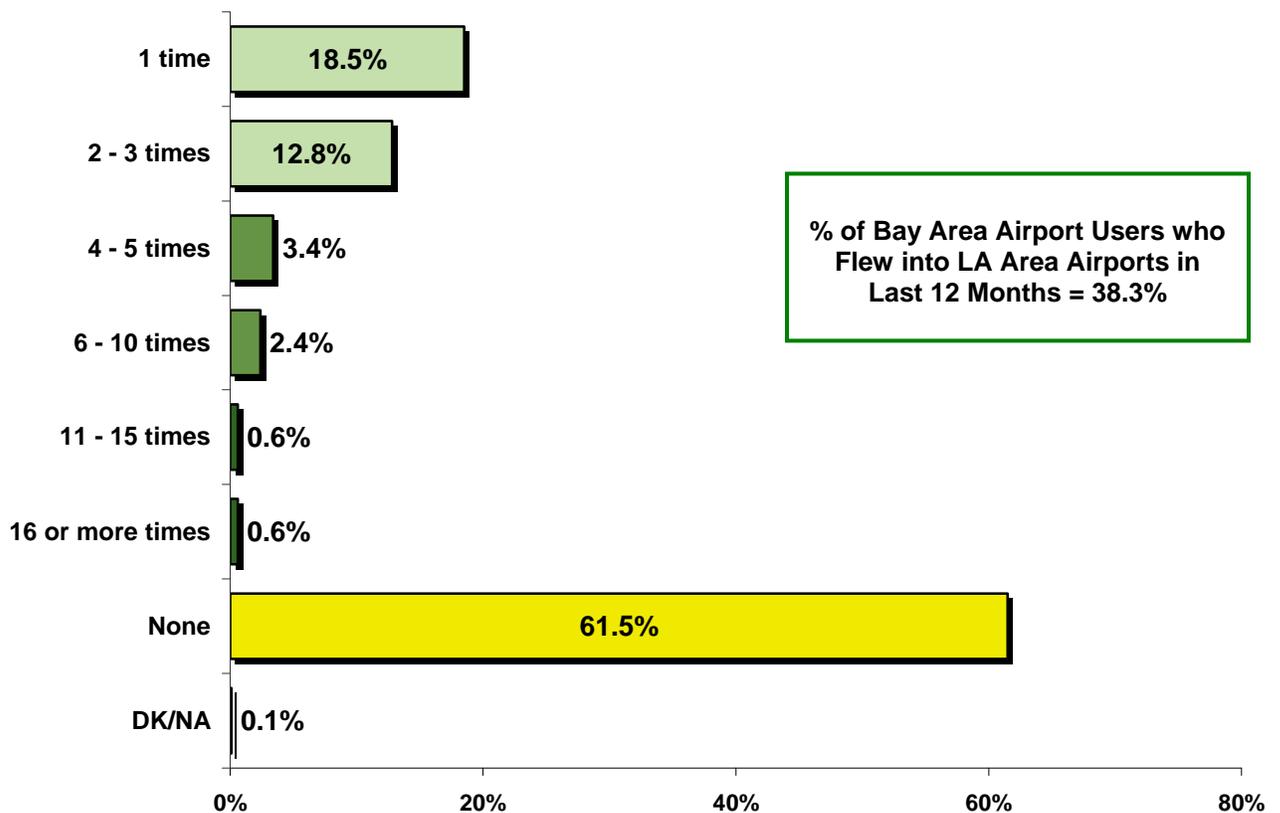
Respondents who took a commercial passenger flight in the last 12 months that originated in the Bay Area were next asked whether they had flown into any of the following Los Angeles area airports during the past year where Southern California was the destination of their trip (not including layovers or connections):

- Los Angeles International/LAX;
- Orange County/John Wayne;
- Ontario;
- Burbank; or
- Long Beach.

Overall, 38 percent of respondents who took a commercial passenger flight out of the Bay Area in the last 12 months flew into a Los Angeles area airport during the past year.

Specifically, 31 percent took three trips or less to Los Angeles, six percent flew into Los Angeles four to 10 times, and one percent had taken more than 10 trips to Los Angeles. Sixty-two percent of the respondents who flew out of the Bay Area in the past year had not taken a trip to Los Angeles.

Figure 5 Flown into Los Angeles Area Airports in Last 12 Months



Peninsula residents were the most likely to have flown into Los Angeles during the past year and North and South Bay residents were the least likely.

Table 4 Flown into Los Angeles Area Airports in Last 12 Months by Geographic Area⁵

| | Geographic Area | | | |
|------------------------|------------------|-------------------|-----------------|------------------|
| | A. North Bay | B. Peninsula | C. East Bay | D. South Bay |
| Base | 221 | 372 | 502 | 314 |
| 1 time | 19% | 22% | 17% | 16% |
| 2 - 3 times | 8% B | 16% A | 12% | 14% |
| 4 - 5 times | 1% | 4% | 4% | 2% |
| 6 or more times | 3% | 4% | 5% D | 1% C |
| Yes | 32% B | 46% AD | 39% | 33% B |
| None | 68% B | 54% AD | 61% | 67% B |
| DK/NA | - | 0% | 0% | - |

⁵ North Bay = Marin, Napa, Solano, and Sonoma counties; Peninsula = San Francisco and San Mateo counties; East Bay = Alameda and Contra Costa counties; South Bay = Santa Clara County. Statistically significant differences by geographic area are denoted by letters. For example, a “B” in a cell in Column A indicates that the North Bay (“A”) is statistically different than the Peninsula (“B”) with regard to that particular response.

Below are the highlights from the analysis of flying into a Los Angeles area airport during the last 12 months (where Southern California was their destination) by sub-groups.

- The number of trips taken out of the Bay Area in the past 12 months was positively correlated with having flown into LA. Seventy-two percent of respondents who flew out of the Bay Area six times or more in the past year had flown into a Los Angeles area airport compared with 30 percent of those who flew out of the Bay Area five times or less.
- Respondents living in San Francisco County were the most likely to have flown into a Los Angeles area airport in the past year (49%), whereas those in Marin County were the least likely (31%).
- Respondents 65 and older were less likely than those 64 and younger to have flown into a Los Angeles area airport in the past year (30% vs. 40%).
- Respondents who regularly commuted to work or school were more likely than those who didn't commute to have flown into a Los Angeles area airport in the past year (42% vs. 31%).
- Respondents with a household income of \$150,000 or more were more likely than respondents at other income levels to have flown into a Los Angeles area airport in the past year (48% vs. 36%).
- In addition, those who primarily flew out of Oakland were more likely to have flown into LA during the past year (43%) than those who mostly flew out of San Jose (38%) or San Francisco (36%) airports.
- The majority of business travelers have flown into a Los Angeles area airport in the past year compared with 29 percent of those who traveled primarily for leisure.
- No statistically significant differences were found in whether or not respondents had flown into a Los Angeles area airport in the past year by presence of children in the household, homeownership status, or gender.

SATISFACTION WITH ASPECTS OF PRIMARY AIRPORT

Respondents who flew out of the Bay Area in past year were next asked to detail their satisfaction with a variety of characteristics of the Bay Area airport they used the most.

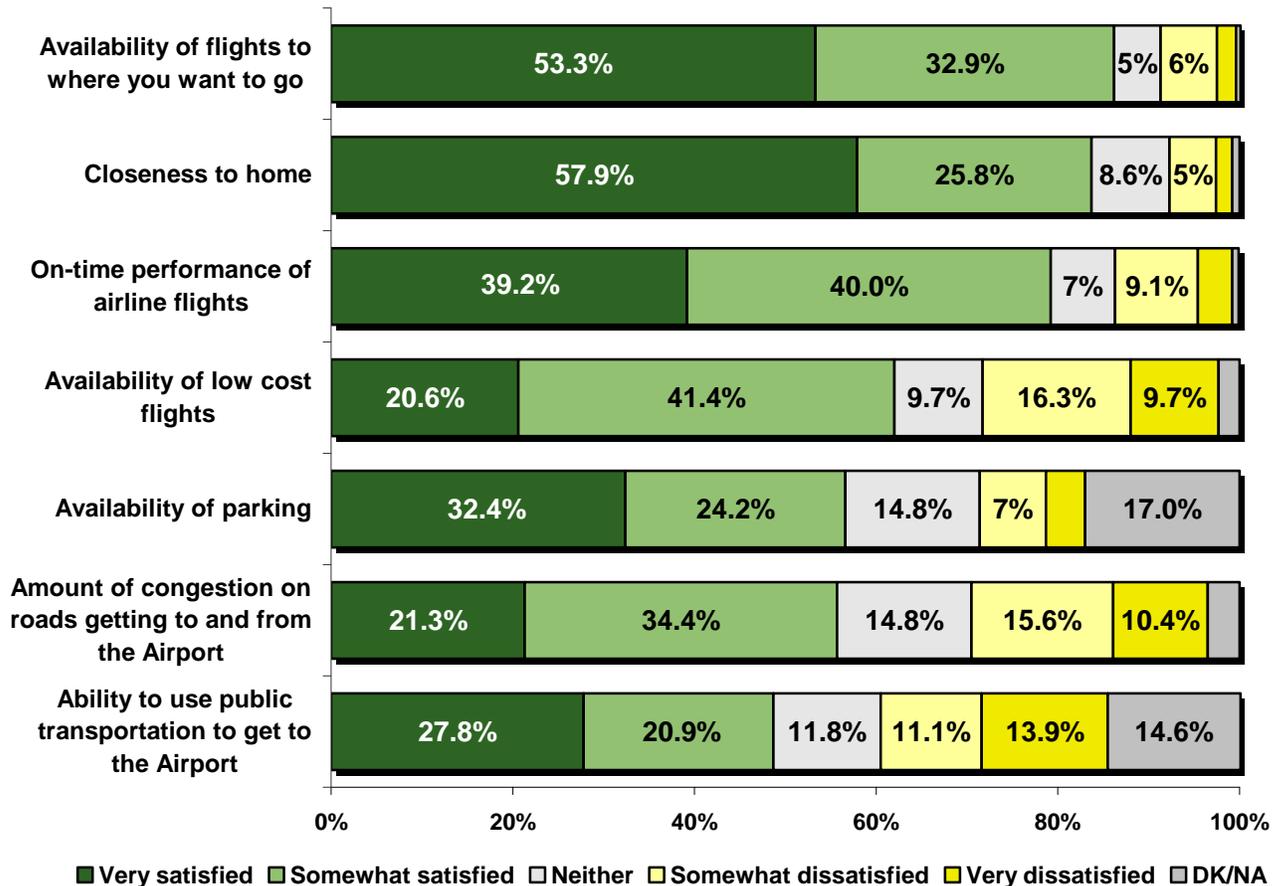
Among the seven airport characteristics tested, respondents were most satisfied with:

- Availability of flights to where you want to go (86% satisfaction);
- Closeness to home (84% satisfaction); and
- On-time performance of airline flights (79% satisfaction).

Nearly a quarter of the respondents who flew out of the Bay Area in the past year were dissatisfied with the:

- Amount of congestion on roads getting to and from the Airport (26% dissatisfaction);
- Availability of low cost flights (26% dissatisfaction); and
- Ability to use public transportation to get to the Airport (25% dissatisfaction).

Figure 6 Satisfaction with Aspects of Primary Airport



The table below shows overall satisfaction (first column) as well as satisfaction by respondents' primary airport (i.e., the airport they flew out of the most).

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
- Amount of 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 San Francisco 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.

Table 5 Satisfaction by Primary Airport

| | Satisfaction Across All Airports | Satisfaction Oakland International Airport | Satisfaction San Jose International Airport | Satisfaction San Francisco International Airport |
|---|----------------------------------|--|---|--|
| Base | 1,409 | 438 | 277 | 642 |
| Availability of flights to where you want to go | 86% | 87% | 87% | 86% |
| Closeness to home | 84% | 85% | 91% | 80% |
| On-time performance of airline flights | 79% | 85% | 83% | 74% |
| Availability of low cost flights | 62% | 68% | 65% | 57% |
| Availability of parking | 57% | 61% | 57% | 53% |
| Amount of congestion on roads getting to and from the Airport | 56% | 55% | 66% | 52% |
| Ability to use public transportation to get to the Airport | 49% | 49% | 33% | 57% |
| Average across items | 67% | 70% | 69% | 65% |

Cells highlighted in green were statistically higher than the others.

To follow is satisfaction with various aspects of respondents’ primary airport by their geographic area of residence.

Compared with those living in the North or East Bay, voters who lived in the Peninsula or South Bay were more satisfied with:

- Closeness to home and
- Amount of congestion on roads getting to and from the Airport.

Peninsula residents were also:

- 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 parking.

Compared with those in other areas, North Bay residents were the most satisfied with the availability of parking at their primary airport.

Table 6 Satisfaction by Geographic Area⁶

| | North Bay | Peninsula | East Bay | South Bay |
|---|------------|------------|-------------|-------------|
| Base | 368 | 477 | 722 | 433 |
| Availability of flights to where you want to go | 85% | 87% | 87% | 85% |
| Closeness to home | 67% | 90% | 84% | 89% |
| On-time performance of airline flights | 78% | 74% | 83%* | 81%* |
| Availability of low cost flights | 59% | 61% | 66% | 60% |
| Availability of parking | 68% | 49% | 56% | 60% |
| Amount of congestion on roads getting to and from the Airport | 45% | 59% | 52% | 64% |
| Ability to use public transportation to get to the Airport | 35% | 62% | 54% | 33% |
| Average across items | 62% | 69% | 69% | 67% |

Cells highlighted in green were statistically higher than the others.

East and South Bay respondents reported statistically higher satisfaction with on-time performance of airline flights than Peninsula residents. However, their satisfaction was not statistically different than North Bay residents.

⁶ North Bay = Marin, Napa, Solano, and Sonoma counties; Peninsula = San Francisco and San Mateo counties; East Bay = Alameda and Contra Costa counties; South Bay = Santa Clara County.

VIEWS ON FUTURE OF AIRPORTS IN REGION

All survey respondents were presented with the opinions of two Bay Area residents who disagree about the future of airports in the region.

Below are the opinions of the two residents:

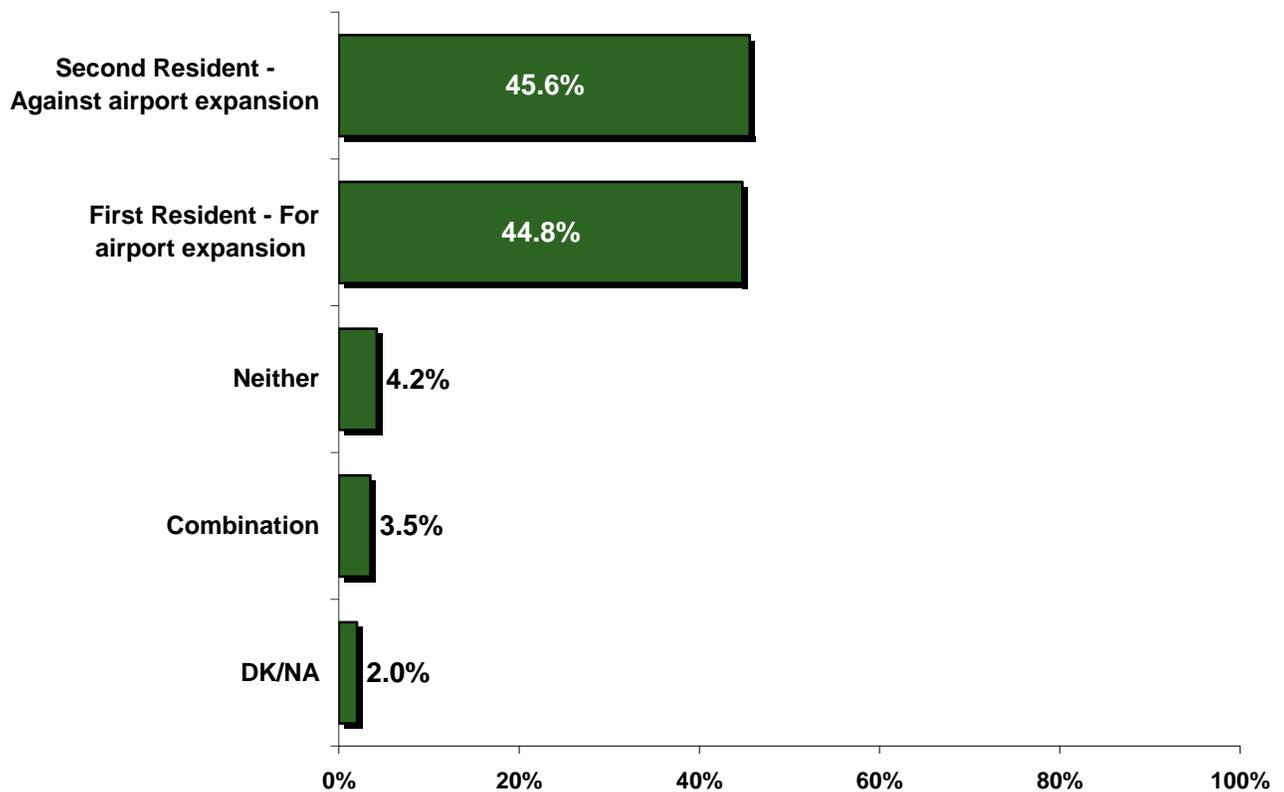
- The first resident believes that we should expand airports to allow more flights which will keep air travel convenient and affordable and help our regional economy.
- The second resident believes that we should not expand airports to allow more flights because it will increase noise, congestion, and pollution and ultimately hurt our quality of life.

After reading each resident's opinion, respondents were asked to select the opinion closest to their own.

Respondents were evenly split on the opinion closest to their own. Forty-six percent of respondents agreed with the second resident and were against airport expansion and 45 percent agreed with the first resident and were in favor of airport expansion.

Four percent did not agree with either resident, four percent agreed with a combination of both, and two percent were not sure which opinion was closer to their own.

Figure 7 Views on Future of Airports in Region



Examining views by geography, Peninsula voters were more likely to indicate that they did not agree with either resident (Neither: 6%) as well as more likely to indicate that they agreed with a combination of both residents (Combination: 5%).

There are no statistically significant differences in support or opposition for airport expansion when “Neither,” “Combination,” or “DK/NA” responses are factored out.

Table 7 Views on Future of Airports in Region by Geographic Area⁷

| | Geographic Area | | | |
|--|-----------------|------------------|-----------------|------------------|
| | A. North Bay | B. Peninsula | C. East Bay | D. South Bay |
| Base | 368 | 477 | 722 | 433 |
| For airport expansion - First Resident | 44% | 41% D | 45% | 49% B |
| Against airport expansion - Second Resident | 46% | 45% | 46% | 45% |
| Neither | 4% | 6% CD | 3% B | 3% B |
| Combination | 3% | 5% D | 4% D | 1% BC |
| DK/NA | 2% | 2% | 2% | 2% |

⁷ North Bay = Marin, Napa, Solano, and Sonoma counties; Peninsula = San Francisco and San Mateo counties; East Bay = Alameda and Contra Costa counties; South Bay = Santa Clara County. Statistically significant differences by geographic area are denoted by letters. For example, a “B” in a cell in Column A indicates that the North Bay (“A”) is statistically different than the Peninsula (“B”) with regard to that particular response.

Below is an assessment of voters' views on the future of airports in the region by sub-groups.

- Respondents who had not 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.
 - Two thirds of respondents who had taken 16 or more trips out of the Bay Area in the past year supported airport expansion.
- Most likely related to their increased rate of traveling, support for airport expansion increased as household income increased.
- Respondents who flew primarily for leisure were more likely to oppose airport expansion whereas the majority of those who flew for business supported airport expansion.
- Respondents who flew mostly out of San Jose were more supportive of expanding (56%) than those who mostly flew out of Oakland (46%) or San Francisco (44%).
- Contra Costa (50%) and Santa Clara (49%) County residents were the most supportive of airport expansion whereas Alameda County residents were the most likely to be opposed (50%) and Marin County residents were the most likely to indicate they did not agree with either position (11%).
- Respondents who owned their home were more supportive of airport expansion than renters (48% vs. 40%).
- The majority of men supported airport expansion, whereas the majority of women opposed it.
- Respondents 65 and older were more supportive of airport expansion than younger residents (65 and older: 52% supported; 40 to 64 years old: 46%; 18 to 39 years old: 39%).
- The majority of Republicans supported airport expansion whereas the majority of Democrats opposed it.
- No differences were found by commute status, presence of children in the household, or ethnicity.

SUPPORT FOR STRATEGIES TO DEAL WITH ANTICIPATED DEMAND FOR BAY AREA FLIGHTS

Respondents were next informed that given the current economy, overall demand for commercial passenger flights has stopped growing for now. However, in the next 10 to 20 years, it is expected that the current airports in the Bay Area will not be able to handle the demand for air travel to and from the Bay Area.

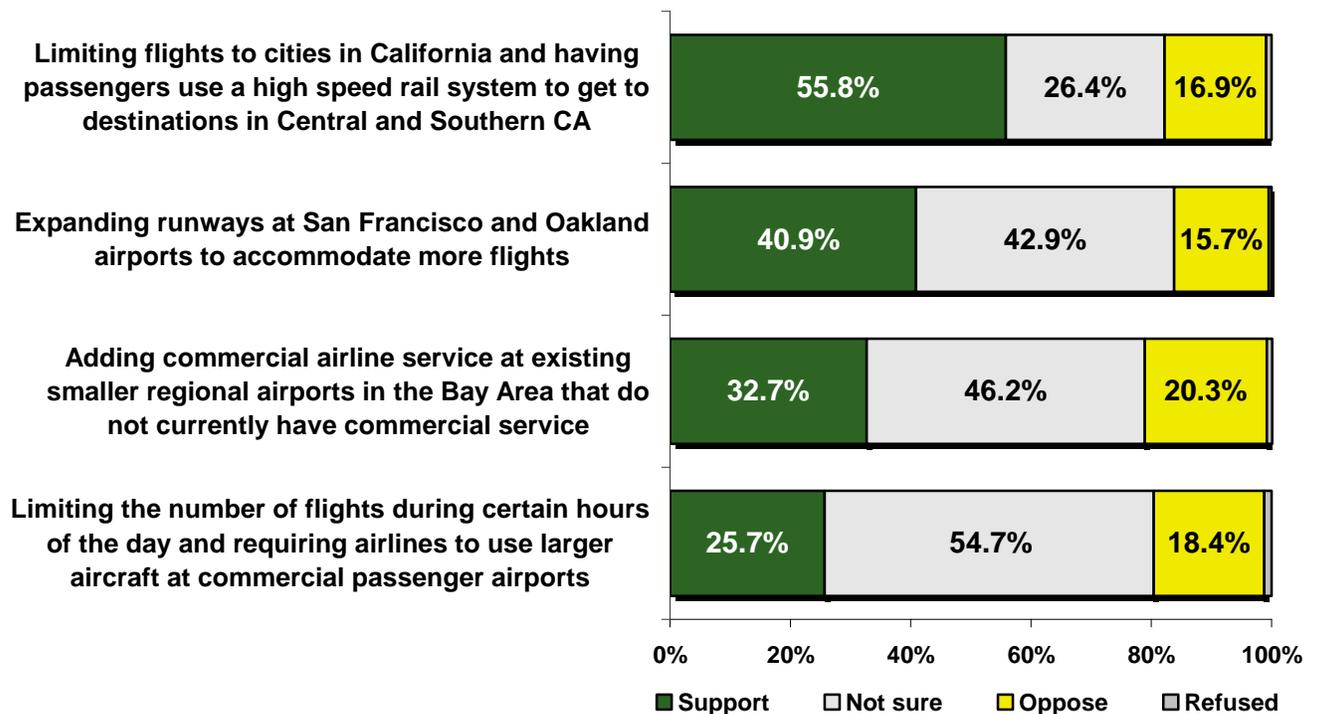
Respondents were then asked whether they would support or oppose four different strategies being considered to deal with the need for increased capacity for commercial passenger airline flights in the Bay Area.

The majority of respondents would support “Limiting flights to cities in California and having passengers use a high speed rail system to get to destinations in Central and Southern California” (56%), 26 percent were not sure, and 17 percent were opposed.

Following high speed rail, the next most supported strategy was “Expanding runways at San Francisco and Oakland airports to accommodate more flights,” with 41 percent indicating support, 43 percent not sure, and 16 percent opposed when initially asked.

One in three respondents supported “Adding commercial airline service at existing smaller regional airports in the Bay Area that do not currently have commercial service” and one in four would support “Limiting the number of flights during certain hours of the day and requiring airlines to use larger aircraft at commercial passenger airports.”

Figure 8 Support for Strategies to Deal with Anticipated Demand for Bay Area Flights



The tables on the following pages display voter support for each of the proposed strategies by geographic area of residence.

There were no statistically significant differences in support for “Limiting flights to cities in California and having passengers use a high speed rail system to get to destinations in Central and Southern California” by geography.

Table 8 Support Limiting Flights and Using High Speed Rail by Geographic Area⁸

| | | Geographic Area | | | |
|---|----------|-----------------|--------------|-------------|--------------|
| | | A. North Bay | B. Peninsula | C. East Bay | D. South Bay |
| Base | | 368 | 477 | 722 | 433 |
| Q9C Limiting flights to cities in California and having passengers use a high speed rail system to get to destinations in Central and Southern CA | Support | 56% | 58% | 55% | 54% |
| | Not sure | 27% | 26% | 25% | 27% |
| | Oppose | 16% | 14% C | 19% B | 18% |
| | Refused | 1% | 1% | 1% | 0% |

⁸ North Bay = Marin, Napa, Solano, and Sonoma counties; Peninsula = San Francisco and San Mateo counties; East Bay = Alameda and Contra Costa counties; South Bay = Santa Clara County. Statistically significant differences by geographic area are denoted by letters. For example, a “B” in a cell in Column A indicates that the North Bay (“A”) is statistically different than the Peninsula (“B”) with regard to that particular response.

Although South Bay residents were more likely than Peninsula residents to indicate that they were unsure, there were no statistically significant differences in support for “Expanding runways at San Francisco and Oakland airports to accommodate more flights” by geography.

Table 9 Support Expanding Runways by Geographic Area⁹

| | | Geographic Area | | | |
|---|----------|-----------------|--------------|-------------|--------------|
| | | A. North Bay | B. Peninsula | C. East Bay | D. South Bay |
| Base | | 368 | 477 | 722 | 433 |
| Q9A Expanding runways at San Francisco and Oakland airports to accommodate more flights | Support | 40% | 42% | 42% | 39% |
| | Not sure | 43% | 39% D | 43% | 47% B |
| | Oppose | 17% | 18% | 15% | 14% |
| | Refused | 1% | 1% | 0% | 1% |

⁹ North Bay = Marin, Napa, Solano, and Sonoma counties; Peninsula = San Francisco and San Mateo counties; East Bay = Alameda and Contra Costa counties; South Bay = Santa Clara County. Statistically significant differences by geographic area are denoted by letters. For example, a “B” in a cell in Column A indicates that the North Bay (“A”) is statistically different than the Peninsula (“B”) with regard to that particular response.

Compared with residents in other areas, North Bay residents were the most supportive of “Adding commercial airline service at existing smaller regional airports in the Bay Area that do not currently have commercial service.”

Table 10 Support Adding Service at Smaller Airports by Geographic Area¹⁰

| | | Geographic Area | | | |
|--|----------|-----------------|--------------|-------------|--------------|
| | | A. North Bay | B. Peninsula | C. East Bay | D. South Bay |
| Base | | 368 | 477 | 722 | 433 |
| Q9B Adding commercial airline service at existing smaller, regional airports in the Bay Area that do not currently have commercial service | Support | 49% BCD | 32% AD | 29% A | 26% AB |
| | Not sure | 36% BCD | 46% A | 48% A | 52% A |
| | Oppose | 14% BCD | 21% A | 22% A | 21% A |
| | Refused | 1% | 1% | 1% | 1% |

¹⁰ North Bay = Marin, Napa, Solano, and Sonoma counties; Peninsula = San Francisco and San Mateo counties; East Bay = Alameda and Contra Costa counties; South Bay = Santa Clara County. Statistically significant differences by geographic area are denoted by letters. For example, a “B” in a cell in Column A indicates that the North Bay (“A”) is statistically different than the Peninsula (“B”) with regard to that particular response.

Compared with East Bay residents, North Bay residents were more likely to be undecided on “Limiting the number of flights during certain hours of the day and requiring airlines to use larger aircraft at commercial passenger airports.”

Table 11 Support Limiting Flights and Using Larger Aircraft by Geographic Area¹¹

| | | Geographic Area | | | |
|---|----------|-----------------|--------------|-------------|--------------|
| | | A. North Bay | B. Peninsula | C. East Bay | D. South Bay |
| Base | | 368 | 477 | 722 | 433 |
| Q9D Limiting the number of flights during certain hours of the day and requiring airlines to use larger aircraft at commercial passenger airports | Support | 21% D | 26% | 26% | 27% A |
| | Not sure | 60% C | 55% | 52% A | 54% |
| | Oppose | 18% | 17% | 20% | 17% |
| | Refused | 1% | 1% | 1% | 1% |

¹¹ North Bay = Marin, Napa, Solano, and Sonoma counties; Peninsula = San Francisco and San Mateo counties; East Bay = Alameda and Contra Costa counties; South Bay = Santa Clara County. Statistically significant differences by geographic area are denoted by letters. For example, a “B” in a cell in Column A indicates that the North Bay (“A”) is statistically different than the Peninsula (“B”) with regard to that particular response.

To follow is an analysis of support for the different strategies by sub-groups.

Limiting Flights and Using High Speed Rail to Get to Central and Southern California

When compared to their sub-group counterparts, initial support was higher among:

- Residents who mostly flew out of San Francisco (SFO);
- Voters who were against airport expansion (sided with the second resident in Question 8);
- Those who typically took public transportation to commute to work or school;
- Democrats;
- Renters.

When compared to their sub-group counterparts, initial opposition was higher among:

- Primarily business travelers;
- Voters who supported airport expansion (sided with first resident in Question 8);
- Those who flew out of the Bay Area 16 or more times during past year;
- Those who made \$100k or more;
- Republicans;
- Men;
- Napa County residents.

When compared to their sub-group counterparts, indecisiveness was higher among:

- Those who had not flown out of the Bay Area in the past year;
- Primarily leisure travelers or an even balance of business and leisure;
- Those who did not regularly commute to work or school;
- Women;
- Respondents with a household income under \$25,000 a year.

Expanding Runways at SFO and OAK Airports to Accommodate More Flights

When compared to their sub-group counterparts, initial support was higher among:

- Voters who supported airport expansion (sided with first resident in Question 8);
- 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;
- Republicans;
- Male respondents.

When compared to their sub-group counterparts, indecisiveness was higher among:

- Voters who were against airport expansion (sided with the second resident in Question 8);
- Those who had not flown out of the Bay Area in the past year;
- Respondents who flew primarily for leisure;
- Those who had not flown into a Los Angeles area airport in the past year;
- Women;
- Democrats;
- Those with a household income under \$75,000.

There were no differences in support for this strategy by primary airport.

Adding Service at Existing Smaller Regional Airports

When compared to their sub-group counterparts, initial support was higher among:

- Voters who supported airport expansion (sided with first resident in Question 8);
- Residents who mostly flew out of Oakland or San Francisco airports;
- Residents of Sonoma, Solano, and Marin counties.

When compared to their sub-group counterparts, initial opposition was higher among:

- Voters who opposed airport expansion (sided with the second resident in Question 8);
- Residents who mostly flew out of San Jose;
- White respondents;
- Homeowners;
- Democrats;
- Respondents 40 to 64 years of age;
- Households that made \$75,000 or more a year.

When compared to their sub-group counterparts, indecisiveness was higher among:

- Those who had only flown out of the Bay Area one time during the past year;
- Non-white respondents;
- Renters;
- Respondents under 40 years of age;
- Households that made less than \$75,000 a year.

Limiting Flights and Requiring Airlines to Use Larger Aircraft

When compared to their sub-group counterparts, initial support was higher among:

- Renters;
- Those who traveled primarily for leisure or an even balance between business and leisure;
- Respondents who regularly commuted to work or school;
- Men;
- Democrats;
- Residents under 50 years of age.

When compared to their sub-group counterparts, initial opposition was higher among:

- Voters who supported airport expansion (sided with first resident in Question 8);
- Those who took six or more Bay Area flights in the past year;
- Those who flew into Los Angeles six or more times during the past year;
- Respondents with a household income of \$150,000 or more;
- Homeowners;
- Those who flew primarily for business;
- Residents 50 years of age or older;
- Republicans;
- Contra Costa and Marin county residents;
- Male respondents.

When compared to their sub-group counterparts, indecisiveness was higher among:

- Voters who opposed airport expansion (sided with the second resident in Question 8);
- Those who had not flown out of the Bay Area in the past year or who had only flown once;
- Women;
- Respondents with a household income less than \$150,000;

There were no differences in support for this strategy by primary airport.

FOLLOW-UP QUESTIONS

Immediately after indicating whether they would support each strategy to deal with anticipated demand for Bay Area flights, respondents were asked a follow-up question based on whether they initially supported or opposed each strategy. Once they answered the appropriate follow-up question, they were asked about the next strategy and then another follow-up question until the series was completed. Respondents who were not sure or declined to state whether they would support a particular strategy were not asked a follow-up question.

This section details the results of the follow-up questions association with each of the four strategies presented to respondents.

LIMITING FLIGHTS AND USING HIGH SPEED RAIL TO GET TO CENTRAL AND SOUTHERN CALIFORNIA

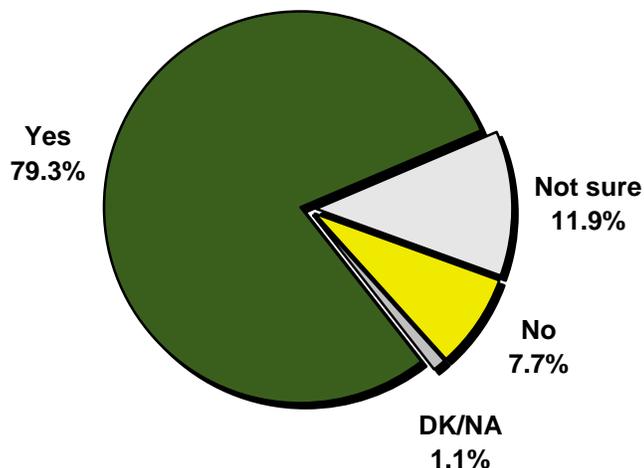
Support Limiting Flights and Using High Speed Rail

The 56 percent of voters (1,115 respondents) who indicated they would support limiting flights to cities in California and having passengers use a high speed rail system to get to destinations in Central and Southern California were next asked:

Would you still support limiting flights to cities in California and have passengers use high speed rail, if you knew that high speed rail would cost about the same as air travel but would take two and a half hours to get to Southern California?

Seventy-nine percent of supporters retained their original position, 12 percent shifted to not sure, eight percent became opposed, and one percent declined to state.

Figure 9 Supporters: Still Support if Knew Would Cost the Same and Take 2.5 Hours



Results of the follow-up question bring overall support from 56 percent to 44 percent, not sure from 26 percent to 33 percent, opposition from 17 percent to 21 percent, and declined to state from one percent to two percent.

To follow is an analysis of respondents who initially supported limiting flights and using high speed rail, but changed their response to either not sure or opposition after learning it would cost the same but take two and a half hours to get to Southern California.

- No statistically significant differences were found by whether or not they had flown out of the Bay Area in the past year, whether or not they had flown into LA in the past year, trip purpose, primary airport, commute status, presence of children in the household, homeownership status, gender, or county of residence.

Below is a summary of the differences that were found.

- Respondents who normally drove alone to work or school were more likely to have been influenced by the question than those who normally took public transportation.
- Non-White respondents were more likely to change their mind after hearing the additional information as compared with White respondents.
- Respondents with a household income under \$25,000 were more likely to be influenced by the follow-up question than respondents with higher incomes.
- Respondents 18 to 29 years of age were more likely to change their mind after hearing the additional information than older respondents.

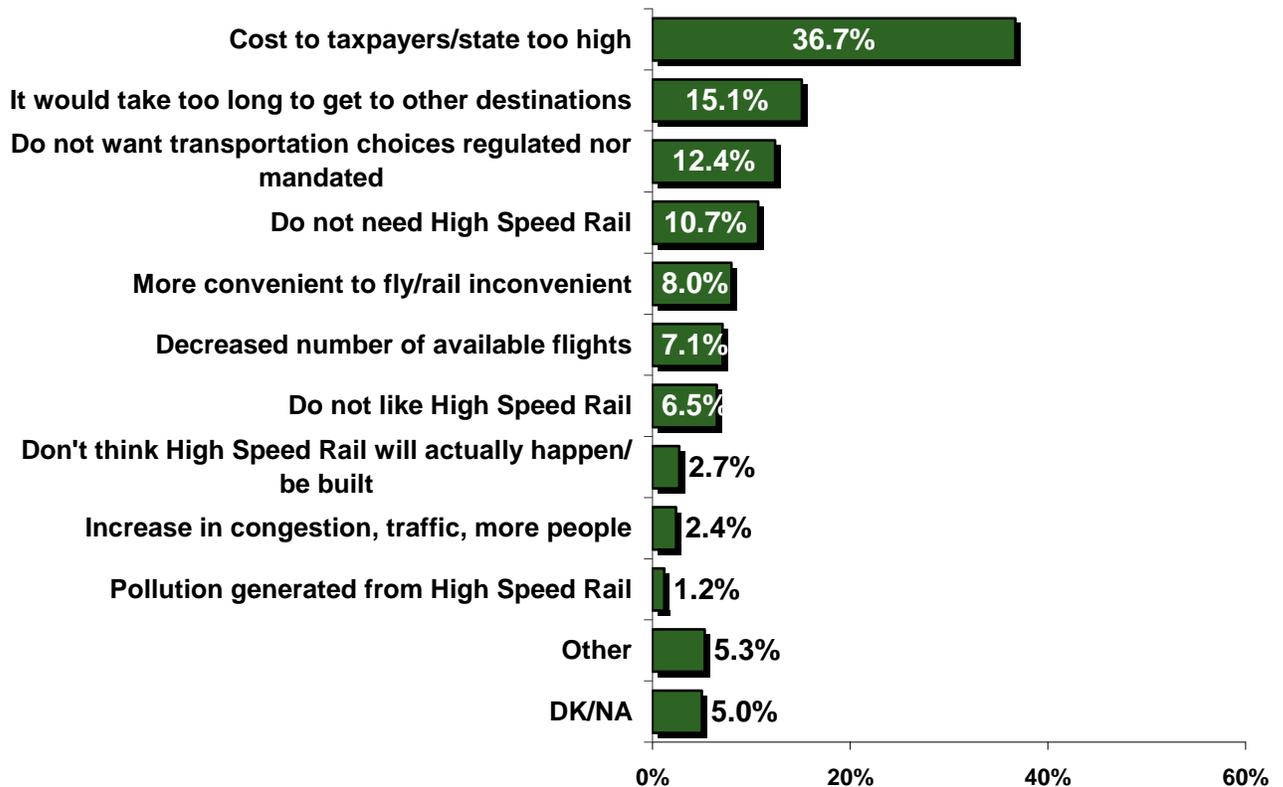
Oppose Limiting Flights and Using High Speed Rail

The 17 percent of voters (338 respondents) who indicated they would oppose limiting flights to cities in California and having passengers use a high speed rail system to get to destinations in Central and Southern California were next asked:

What is your biggest concern about limiting flights to cities in California and having passengers use a high speed rail system to get to destinations in Central and Southern California?

Thirty-seven percent of respondents who opposed limiting flights and using high speed rail cited the cost to taxpayers and the state as their biggest concern. The next closest response was that it would take too long to get to other destinations, which was cited by 15 percent of those opposed.

Figure 10 Opposition: Biggest Concerns about Limiting Flights and Using High Speed Rail¹²



¹² Responses cited by less than two percent of respondents were combined into “Other.” Please refer to the topline results in Appendix A for greater detail.

For this question, respondents were free to mention multiple responses; therefore, the percentages in the figure total more than 100 percent.

EXPANDING RUNWAYS AT SAN FRANCISCO AND OAKLAND AIRPORTS TO ACCOMMODATE MORE FLIGHTS

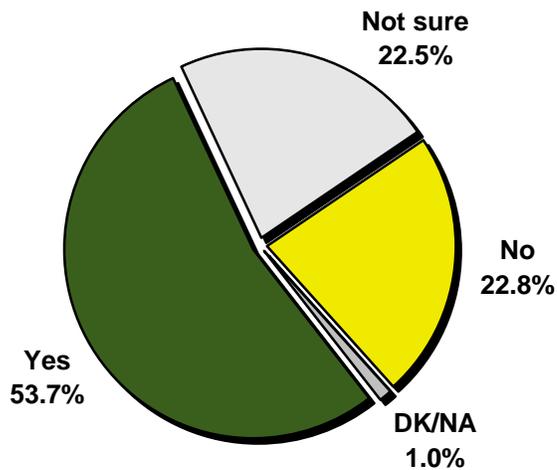
Support Expanding Runways and SFO and OAK

The 41 percent of voters (819 respondents) who indicated they would support expanding runways at San Francisco and Oakland airports to accommodate more flights were next asked:

Would you still support expanding runways if you knew it would require filling in parts of the Bay?

Fifty-four percent of supporters retained their original position, 23 percent shifted to not sure, 23 percent became opposed, and one percent declined to state.

Figure 11 Supporters: Still Support if Knew



Results of the follow-up question shift overall support from 41 percent to 22 percent, not sure from 43 percent to 52 percent, opposition from 16 percent to 25 percent, and declined to state remained at one percent.

To follow is an analysis of respondents who initially supported expanding runways at OAK and SFO, but changed their response to either not sure or opposition after learning it would require filling in parts of the Bay.

- Respondents who had not flown out of the Bay Area in the past year were more likely than those who had flown to change their mind after learning the additional information. In addition, those who had flown 11 times or more were the most likely to maintain support.
- Respondents who primarily traveled for leisure or an even balance between leisure and business were more likely to change their opinion than those who primarily traveled for business.
- Renters were more likely to change their opinion, whereas owners were more likely to maintain support.
- Democrats were more likely to have been influenced by the question than Republicans.
- Women were more likely to change their opinion, whereas men were more likely to maintain support.
- Respondents 18 to 29 years of age were more likely to change their mind after hearing the additional information than older respondents.
- No statistically significant differences were found by whether or not they had flown into LA in the past year, primary airport, commute status, presence of children in the household, or county of residence.

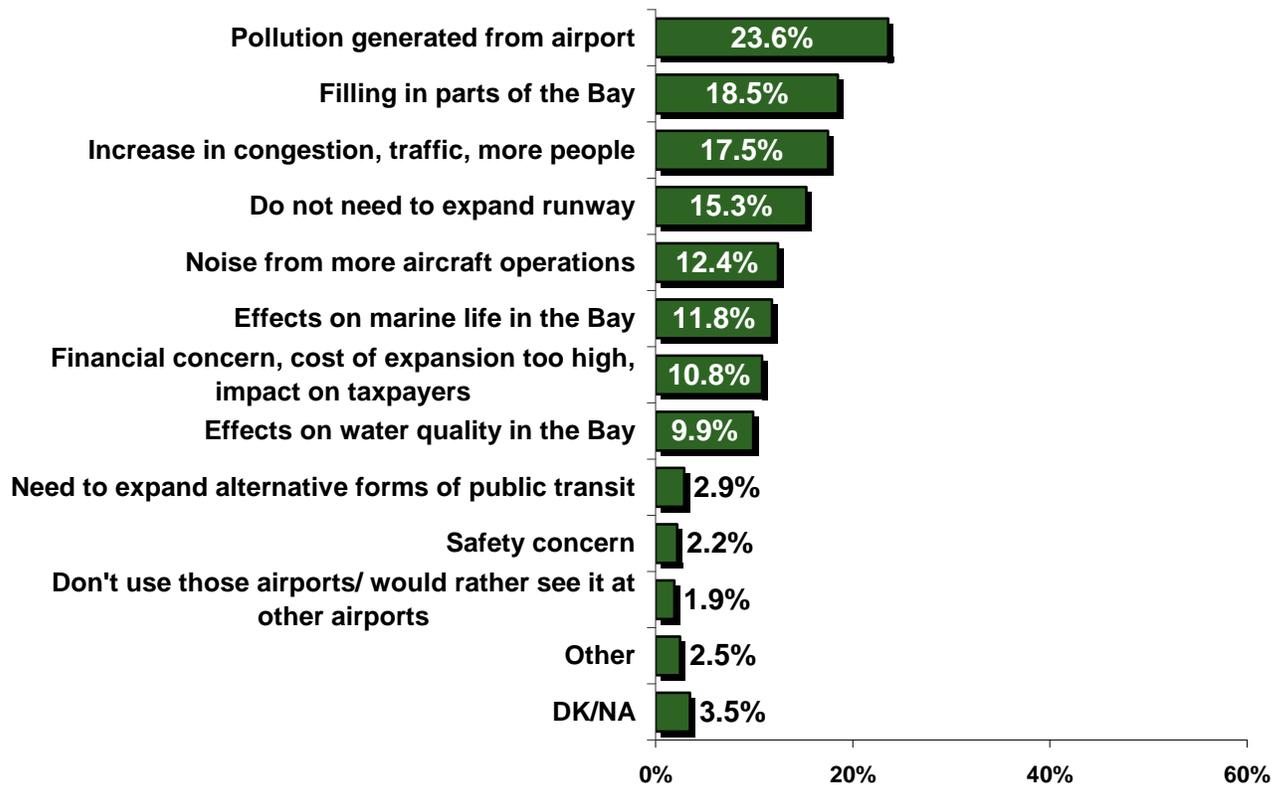
Oppose Expanding Runways and SFO and OAK

The 16 percent of voters (314 respondents) who indicated they would oppose expanding runways at San Francisco and Oakland airports to accommodate more flights were next asked:

What is your biggest concern about expanding runways at San Francisco and Oakland airports to accommodate more flights?

Twenty-four percent of respondents who opposed expanding runways at SFO and OAK were concerned about the pollution generated from the airports, 19 percent were concerned about filling in parts of the Bay, and 18 percent were concerned about the increased congestion (including both traffic and people).

Figure 12 Opposition: Biggest Concerns about Expanding Runways at SFO and OAK¹³



¹³ Responses cited by less than two percent of respondents were combined into “Other.” Please refer to the topline results in Appendix A for greater detail. For this question, respondents were free to mention multiple responses; therefore, the percentages in the figure total more than 100 percent.

ADDING SERVICE AT EXISTING SMALLER REGIONAL AIRPORTS

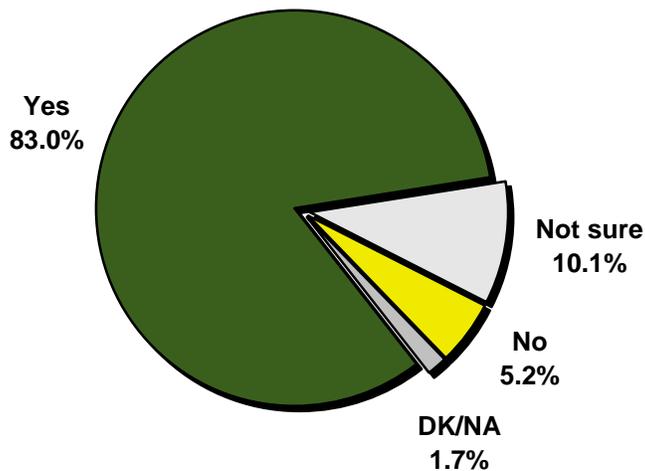
Support Adding Service at Existing Smaller Regional Airports

The 33 percent of voters (654 respondents) who indicated they would support adding airline service at existing, smaller regional airports in the Bay Area that do not currently have commercial passenger air service were next asked:

Would you still support adding airline service if you knew the service would be added to airports such as Santa Rosa, Napa, Concord, Livermore, Travis Air Force Base in Fairfield or Moffett Federal Airfield in Mountain View?

Eighty-three percent of supporters retained their original position, 10 percent shifted to not sure, five percent became opposed, and two percent declined to state.

Figure 13 Supporters: Still Support if Knew



Results of the follow-up question bring overall support from 33 percent to 27 percent, not sure from 46 percent to 50 percent, opposition from 20 percent to 22 percent, and declined to state remained at one percent.

To follow is an analysis of respondents who initially supported adding airline service at smaller existing airports, but changed their response to either not sure or opposition after learning service would be added to airports such as Santa Rosa, Napa, Concord, Livermore, Travis Air Force Base in Fairfield or Moffett Federal Airfield in Mountain View.

- Respondents who primarily flew out of SFO were more likely to change their mind after learning the additional information, whereas those who primarily flew out of OAK and SJC were more likely to maintain support.
- Respondents in San Francisco County were the most likely to change their mind after hearing the additional information, whereas those in Sonoma, Marin, and Napa counties were the most likely to maintain support.
- Renters were more likely to change their opinion, whereas owners were more likely to maintain support.
- Women were more likely to change their opinion, whereas men were more likely to maintain support.
- No statistically significant differences were found by whether or not they had flown out of the Bay Area in the past year, whether or not they had flown into LA in the past year, trip purpose, commute status, presence of children in the household, or household income.

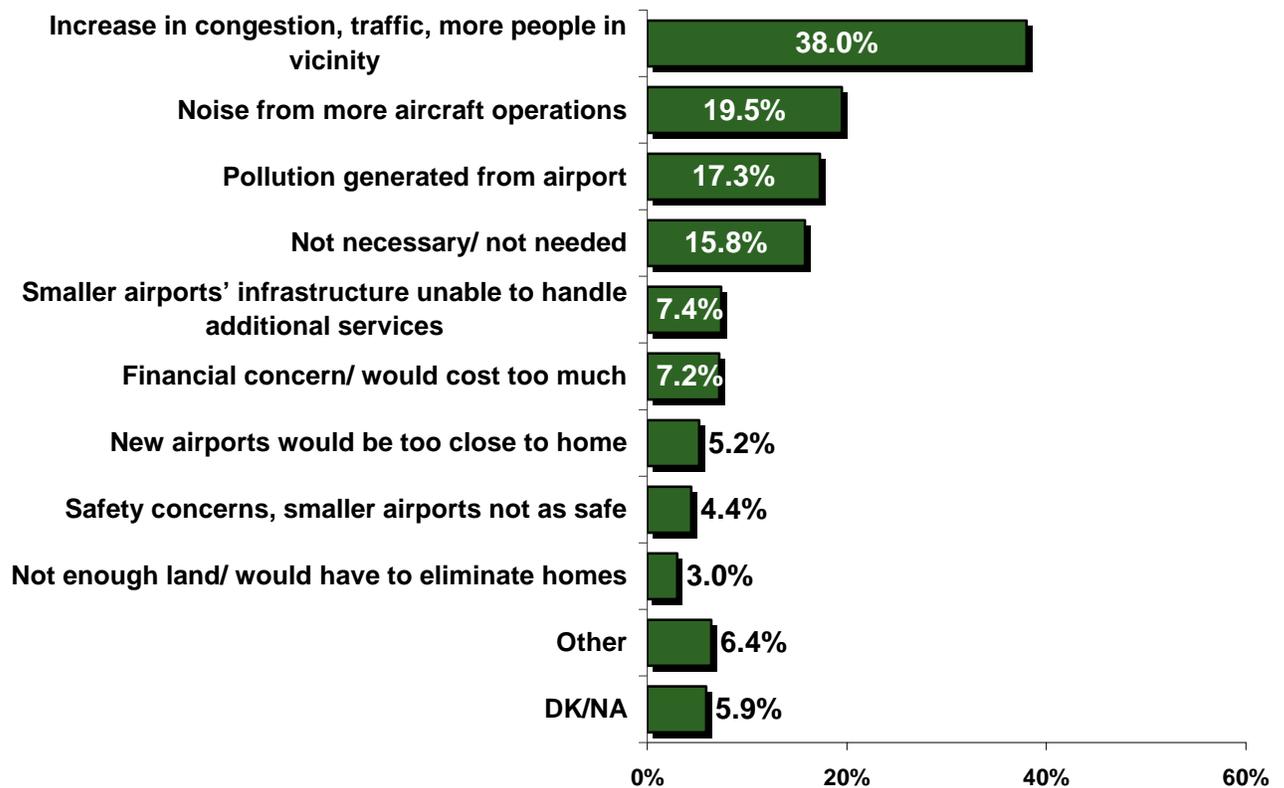
Oppose Adding Service at Existing Smaller Regional Airports

The 20 percent of voters (405 respondents) who indicated they would oppose adding airline service at existing, smaller regional airports in the Bay Area that do not currently have commercial passenger air service were next asked:

What is your biggest concern about adding airline service at existing, smaller regional airports in the Bay Area that do not currently have commercial passenger air service?

Thirty-eight percent of respondents who opposed adding service at smaller regional airports cited the increase in congestion, traffic, and people in the area as their biggest concern. The next closest response was the noise associated with the increased service, cited by 20 percent of those opposed.

Figure 14 Opposition: Biggest Concerns about Adding Service at Smaller Regional Airports¹⁴



¹⁴ Responses cited by less than two percent of respondents were combined into "Other." Please refer to the topline results in Appendix A for greater detail. For this question, respondents were free to mention multiple responses; therefore, the percentages in the figure total more than 100 percent.

LIMITING FLIGHTS AND REQUIRING AIRLINES TO USE LARGER AIRCRAFT

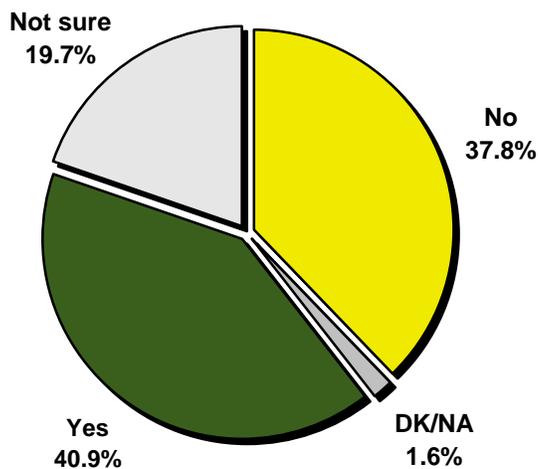
Support Limiting Flights and Requiring Airlines to Use Larger Aircraft

The 26 percent of voters (513 respondents) who indicated they would support limiting flights during certain hours of the day and requiring airlines to use larger aircraft at the commercial passenger airports were next asked:

Would you 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?

Forty-one percent of supporters retained their original position, 20 percent shifted to not sure, 38 percent became opposed, and two percent declined to state.

Figure 15 Supporters: Still Support if Knew



Results of the follow-up question bring overall support from 26 percent to 11 percent, not sure from 55 percent to 60 percent, opposition from 18 percent to 28 percent, and declined to state from one percent to two percent.

To follow is an analysis of respondents who initially supported limiting flights and requiring airlines to use larger aircraft, but changed their response to either not sure or opposition after learning it would be harder to find flights at the times they wanted and increased the cost of flying.

- Respondents who primarily flew out of OAK were more likely to change their mind after learning the additional information, whereas those who primarily flew out of SFO and SJC were more likely to maintain support.
- Respondents who had not flown into LA in the past year were more likely than those who had to change their mind after learning the additional information.
- Respondents with a household income under \$50,000 were more likely to be influenced by the follow-up question than respondents with higher incomes.
- No statistically significant differences were found by whether or not they had flown out of the Bay Area in the past year, trip purpose, commute status, presence of children in the household, or gender.

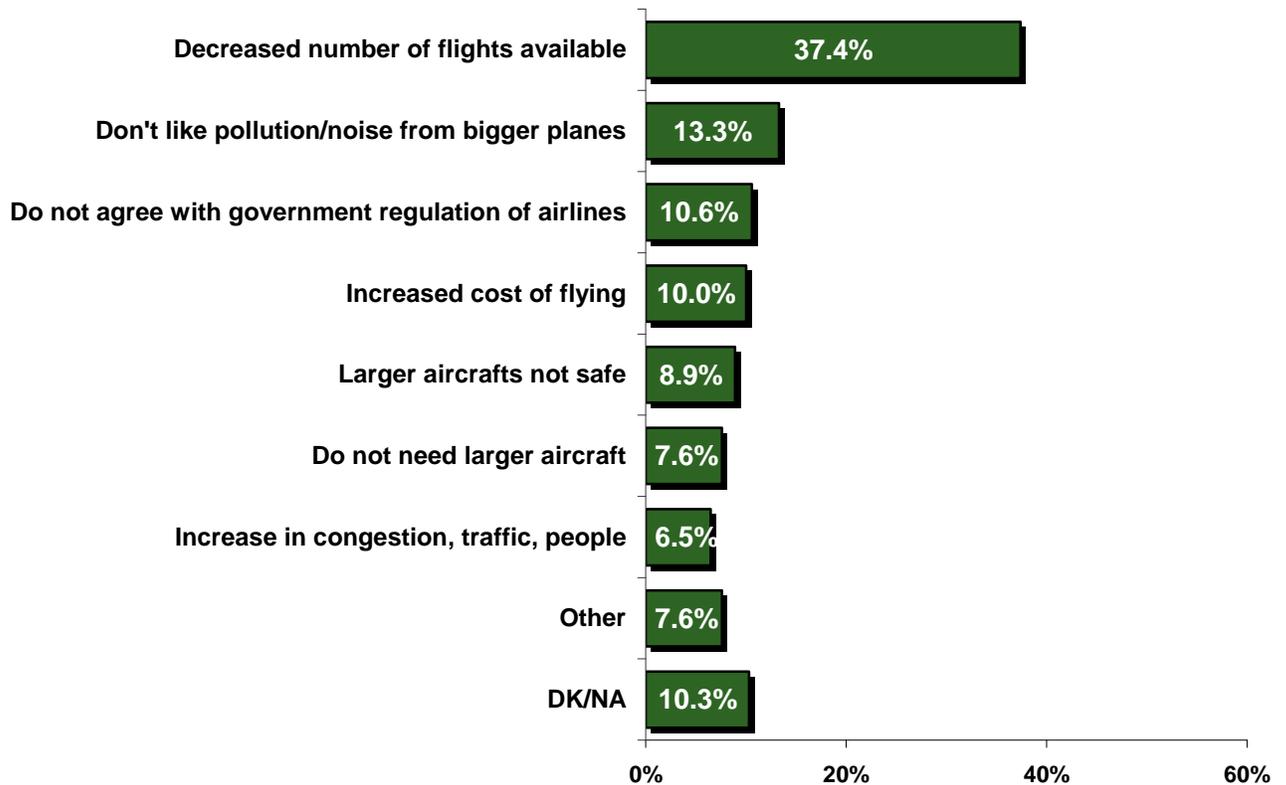
Oppose Limiting Flights and Requiring Airlines to Use Larger Aircraft

The 18 percent of voters (369 respondents) who indicated they would oppose limiting the number of flights during certain hours of the day and requiring airlines to use larger aircraft at the commercial passenger airports were next asked:

What is your biggest concern about limiting the number of flights during certain hours of the day and requiring airlines to use larger aircraft at the commercial passenger airports?

Thirty-seven percent of respondents who opposed limiting flights and requiring airlines to use larger aircraft cited the decreased number of flights available as their biggest concern. The next closest response was the pollution and noise associated with larger aircraft, cited by 13 percent of those opposed.

Figure 16 Opposition: Biggest Concerns about Limiting Flights and Using Larger Aircraft¹⁵



¹⁵ Responses cited by less than two percent of respondents were combined into “Other.” Please refer to the topline results in Appendix A for greater detail. For this question, respondents were free to mention multiple responses; therefore, the percentages in the figure total more than 100 percent.

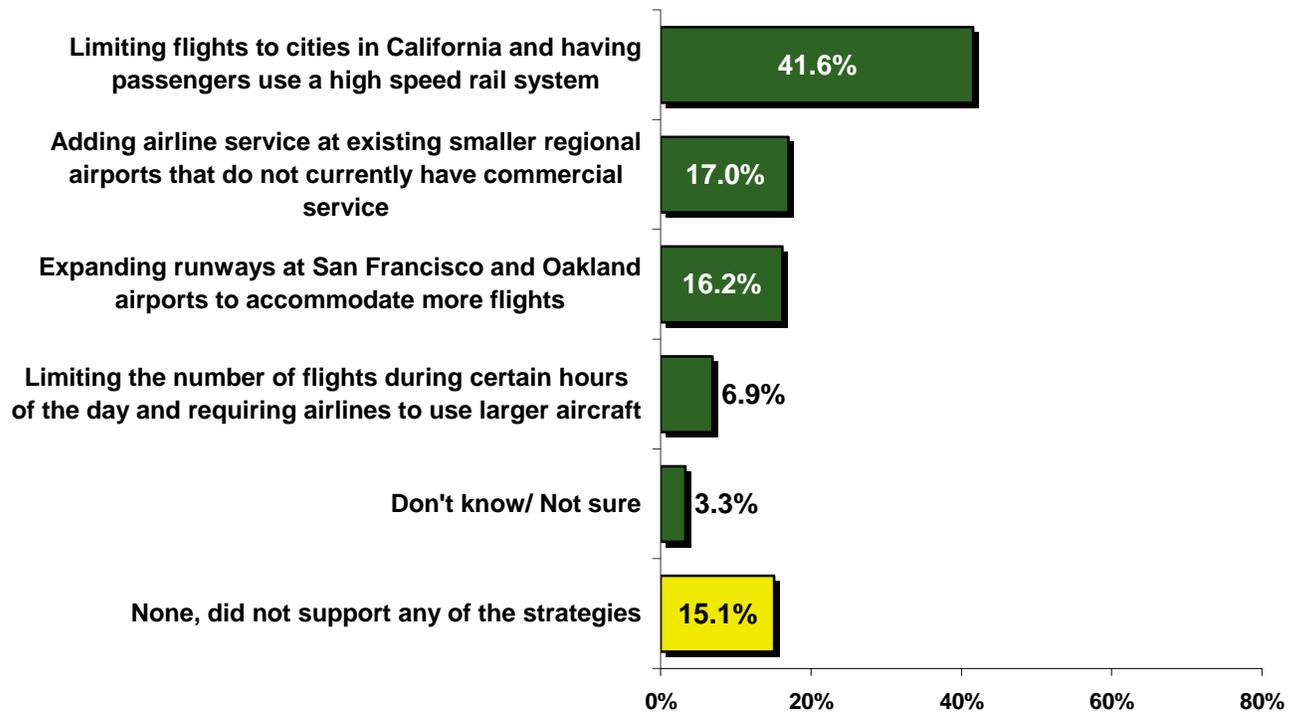
HIGHEST PRIORITY

The last substantive question of the survey asked respondents to select the strategy (of the ones they supported) that should be the highest priority.

Forty-two percent of respondents felt that limiting flights to cities in California and having passengers use a high speed rail system to get to destinations in Central and Southern California should be the highest priority.

The next closest was adding service at existing smaller regional airports, cited by 17 percent of respondents, which was followed closely by expanding runways and SFO and OAK, with 16 percent.

Figure 17 Strategy that Should be the Highest Priority



The table below shows respondents’ most preferred strategy by their geographic area of residence. Limiting flights and using high speed rail was the most preferred strategy among residents in each area. However, adding service at existing smaller regional airports was rated statistically higher among North Bay residents (second most preferred strategy of North Bay residents).

Comparatively, expanding runways and SFO and OAK was rated as the second most preferred strategy among Peninsula, East Bay, and South Bay respondents.

Table 12 Strategy that Should be the Highest Priority by Geographic Area¹⁶

| | Geographic Area | | | |
|--|-----------------|--------------|-------------|--------------|
| | A. North Bay | B. Peninsula | C. East Bay | D. South Bay |
| Base | 368 | 477 | 722 | 433 |
| Limiting flights and using high speed rail | 39% | 43% | 41% | 43% |
| Adding service at existing smaller regional airports | 29% BCD | 14% A | 15% A | 13% A |
| Expanding runways at SFO and OAK | 11% BC | 18% A | 18% A | 16% |
| Limiting flights and using larger aircraft | 5% D | 6% | 7% | 9% A |
| DK/NA | 4% | 3% | 3% | 3% |
| None, did not support any of the strategies | 12% D | 16% | 15% | 17% A |

¹⁶ North Bay = Marin, Napa, Solano, and Sonoma counties; Peninsula = San Francisco and San Mateo counties; East Bay = Alameda and Contra Costa counties; South Bay = Santa Clara County. Statistically significant differences by geographic area are denoted by letters. For example, a “B” in a cell in Column A indicates that the North Bay (“A”) is statistically different than the Peninsula (“B”) with regard to that particular response.

To follow is an analysis of prioritization of the different strategies by sub-groups.

- As one might expect, respondents who had not taken a flight out of a Bay Area airport in the past year were more likely to *not* support any of the strategies proposed than those who had flown in the past year.
- Although there were no differences by whether or not respondents had flown into Los Angeles in the past year, differences were found by the number of times respondents had flown into LA.
 - Among respondents who had flown into a Los Angeles area airport in the past year, those who had flown into LA six or more times were much less likely to choose “Limiting flights to cities in California and having passengers use a high speed rail system” as their preferred strategy (26% vs. 43%).
- Respondents who flew mostly out of Oakland over the past year placed a higher prioritization on adding service at existing smaller regional airports than those who flew mostly out of San Jose or San Francisco.
- A higher percentage of respondents living in Solano and Sonoma counties selected adding service at existing smaller regional airports than those living in other counties.
- Respondents who agreed with the second resident and opposed airport expansion were more likely to *not* support any of the strategies proposed as compared with those who supported expansion (first resident).
- Although there were no differences by whether or not respondents regularly commuted to work or school, differences were found based on commute mode.
 - Among respondents who commuted, those who took public transportation were much more likely than those who typically drove alone to choose “Limiting flights to cities in California and having passengers use a high speed rail system” as their highest priority (51% vs. 39%).
 - Comparatively, those who typically drove alone rated adding service at existing smaller regional airports higher than those who normally used public transportation (18% vs. 12%).
- No statistically significant differences in respondents’ preferred strategy were found by trip purpose or presence of children in the household.

METHODOLOGY

The table below provides an overview of the methodology utilized for the project.

Table 13 Overview of Project Methodology

| | |
|------------------------------|---|
| Method | Telephone Survey in English, Spanish and Cantonese Web Survey in English |
| Universe | 3,646,819 Likely November 2008 Voters (i.e., an Expanded Likely Voter Universe) within the Nine-County Bay Area |
| Number of Respondents | 2,000 Likely Voters Completed a Survey (1,790 Phone; 210 Internet) |
| Average Length | 15 minutes |
| Field Dates | February 4 – 17, 2009 |
| Margin of Error | The <i>maximum</i> margin of error for questions answered by all 2,000 respondents was +/-2.19% at the 95% level of confidence. |

RESEARCH OBJECTIVES

Prior to beginning the project, BW Research met with SH&E and the Regional Airport Planning Committee to determine the research objectives for the study. The main research objectives of the study were to:

- 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.

QUESTIONNAIRE DESIGN

Through an iterative process, BW Research worked closely with SH&E and the Regional Airport Planning Committee to develop a survey instrument that met all the research objectives of the study. In developing the instrument, BW Research utilized techniques to overcome known biases in survey research and minimize potential sources of measurement error within the survey.

SAMPLING METHOD

A mixed-method approach was utilized to interview a representative sample of likely voters (18 years and older) in the nine-county Bay Area. A stratified and clustered sample of likely voters was used as the basis for both the telephone and web survey portions of the project. Both the telephone and web versions of the survey contained the same survey content.

The sample of voters was stratified based on voter and demographic characteristics, including county, city, household party type, age, and gender. Individuals were then grouped into clusters with others sharing their same voter and demographic profile and then randomly selected to complete a survey from within their cluster. If a particular voter refused to participate in the survey, they were replaced with another randomly selected voter from that cluster who shared their same demographic profile. As such, the resulting sample of voters surveyed is representative of the larger universe of all likely voters with regard to demographic characteristics (both overall and by county).

DATA COLLECTION

Prior to beginning data collection, BW Research conducted interviewer training and also pre-tested the survey instrument to ensure that all the words and questions were easily understood by respondents.

BW Research invited a sub-sample of respondents in clusters where at least one-third of the voters had an e-mail address to take the Internet version of the survey. During the same time period, clusters that did not meet the criteria to be invited to take the Internet version of the survey (i.e., clusters where less than one-third of its members had an email address) were called to complete a telephone interview in English, Spanish, or Cantonese over the phone. After approximately one and a half weeks, the telephone methodology was used to complete interviews in clusters that were invited to participate in the web survey but did not.

Telephone interviews were generally conducted from 6:00 pm to 9:00 pm Monday through Thursday and 10:00 am to 2:00 pm on Saturday and Sunday to ensure that residents who commuted or were not at home during the week had an opportunity to participate.

DATA PROCESSING

Prior to analysis, BW Research examined the voter and demographic characteristics of the 2,000 respondents who completed a survey to the known universe of likely voters 18 years and older furnished by our sample provider at both the overall and county levels. By implementing the clustering protocol (one completed survey per cluster), weighting the data was not necessary.

During this phase, BW Research also coded all the verbatim, open-ended data responses into categories to facilitate the analysis.

A NOTE ABOUT MARGIN OF ERROR AND ANALYSIS OF SUB-GROUPS

The overall margin of error for the study, at the 95% level of confidence, is between +/-1.31 percent and +/- 2.19 percent (depending on the distribution of each question) for questions answered by all 2,000 respondents. However, it is important to note that questions asked of smaller groups of respondents (such as questions that were only asked of respondents who had flown out of a Bay Area airport in the past year) or analysis of sub-groups (such as examining differences by county or gender) will have a margin of error greater than +/-2.19 percent, with the exact margin of error dependant on the number of respondents in each sub-group.

BW Research has utilized statistical testing to account for the margin of error within sub-groups and highlight statistically significant sub-group differences throughout this report.

APPENDIX A: TOPLINES



MTC / SH & E – Regional Airport Survey
Voter Survey (n=2,000)
Toplines
February 2009

.....
Introduction:

Hello, may I speak with _____? Hi, my name is _____ and I'm calling on behalf of BW Research, a public opinion research firm. We're conducting a survey concerning issues in your community and we would like to get your opinions. This should just take a few minutes of your time.

(If needed): This is a study about issues of importance in your community and developing planning priorities for the region – the results of the study will be used to help inform local and regional planners - it is a survey only and we are not selling anything.

(If needed): This survey should take approximately 10 minutes of your time.

(IF THE PERSON ASKS WHY YOU ONLY WANT TO TALK TO THE INDIVIDUAL LISTED ON THE SAMPLE, OR ASKS IF THEY ARE ABLE TO PARTICIPATE INSTEAD OF THE INDIVIDUAL, THEN SAY: I'm sorry, but for statistical purposes this survey must only be completed by this particular individual.)

(If the individual mentions the national do not call list, respond according to American Marketing Association guidelines): "Most types of opinion and marketing research studies are exempt under the law that congress recently passed. That law was passed to regulate the activities of the telemarketing industry. This is a legitimate research call. Your opinions count!"

.....
**PLEASE NOTE TRADITIONAL ROUNDING RULES APPLIED
NOT ALL PERCENTAGES WILL EQUAL EXACTLY 100%**

SECTION 1 – Priorities and Comparisons for Regional Airports

1. To begin, I'd like to ask about a number of issues facing residents of the Bay Area. For each issue, please tell me if it is extremely important, very important, somewhat important, or not at all important to you personally.

[IF NEEDED REMIND RESPONDENT OF IMPORTANCE SCALE]

| RANDOMIZE | | Extremely <u>Important</u> | Very <u>Important</u> | Somewhat <u>Important</u> | Not at all <u>Important</u> | [Don't Read] <u>No Opinion</u> |
|-----------|--|-------------------------------|--------------------------|------------------------------|--------------------------------|---------------------------------------|
| A. | Preserving open space and natural habitats..... | 34% | 43% | 18% | 4% | 1% |
| B. | Improving the Bay Area's commercial passenger airports to provide more flights with fewer delays | 9% | 24% | 46% | 20% | 2% |
| C. | Limiting the noise and traffic congestion associated with airports in the region | 9% | 22% | 44% | 23% | 2% |
| D. | Limiting greenhouse gas emissions that contribute to global warming | 39% | 38% | 14% | 8% | 1% |
| E. | Protecting San Francisco Bay | 38% | 46% | 13% | 2% | 1% |
| F. | Improving the region's air quality | 35% | 45% | 17% | 3% | 0% |
| G. | Preventing local tax increases | 20% | 28% | 35% | 14% | 3% |
| H. | Providing high speed rail that connects the Bay Area to Central Valley and Los Angeles..... | 18% | 30% | 31% | 19% | 1% |
| I. | Improving water quality | 35% | 40% | 17% | 7% | 1% |

SECTION 2 – Airport Usage Profile

Next, I would like to ask you about your use of commercial passenger airports in the Bay Area. (IF NEEDED, The Bay Area includes the counties of Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma)

2. In the last 12 months, how many commercial passenger airline trips have you taken that began in the Bay Area? Please count each round-trip flight as one trip (IF NEEDED: This is regardless of the number of segments to the flight). [DO NOT READ RESPONSES]

| | |
|-----|--|
| 17% | 1 trip |
| 27% | 2 to 3 trips |
| 12% | 4 to 5 trips |
| 9% | 6 to 10 trips |
| 3% | 11 to 15 trips |
| 2% | 16 to 30 trips |
| 1% | 31 or more trips |
| 29% | None, haven't taken commercial flight (SKIP TO Q8) |
| 0% | DK/NA (SKIP TO Q8) |

Questions 3 through 8 Only Asked of Those who Have Taken a Commercial Flight in the Last 12 Months (n=1,409)

3. Were the commercial passenger flights you took in the last 12 months primarily for business or for leisure, or was it an even balance between the two?

n=1,409

| | |
|-----|---|
| 15% | Primarily business |
| 64% | Primarily leisure |
| 21% | Even balance between business and leisure air traveling |
| 1% | (Don't Read) DK/NA |

4. When you take a commercial passenger flight, which airport do you fly out of the most?

n=1,409

| | |
|-----|---|
| 31% | Oakland International Airport [OAK] |
| 20% | San Jose International Airport [SJC, Mineta San Jose Airport] |
| 46% | San Francisco International Airport [SFO] |
| 1% | Sacramento Airport |
| 1% | Other (please specify _____) |
| 2% | (Don't Read) DK/NA |

5. Which airports, other than [TAKE RESPONSE FROM Q4], have you used in the past 12 months? [ALLOW MULTIPLE RESPONSES]

n=1,409

| | |
|-----|---|
| 21% | Oakland International Airport [OAK] |
| 12% | San Jose International Airport [SJC, Mineta San Jose Airport] |
| 30% | San Francisco International Airport [SFO] |
| 1% | Sacramento Airport |
| 1% | Santa Rosa Airport |
| 3% | Other (please specify_____) |
| 41% | (Don't Read) None, no others |
| 0% | (Don't Read) DK/NA |

6. In the last 12 months, have you flown into any of the following Los Angeles area airports where Southern California was the destination of your trip? This would not include a "layover" or connection:

Los Angeles International/LAX;
Orange County/John Wayne;
Ontario;
Burbank; or
Long Beach?

n=1,409

| | |
|-----|---|
| 19% | Yes, 1 time |
| 13% | Yes, 2 to 3 times |
| 3% | Yes, 4 to 5 times |
| 2% | Yes, 6 to 10 times |
| 1% | Yes, 11 to 15 times |
| 1% | Yes, 16 to 30 times |
| 62% | None, haven't flown into the Los Angeles area airports listed |
| 0% | (Don't Read) DK/NA |

7. Next I would like to know how satisfied or dissatisfied you are with the following characteristics of the Bay Area airport that you use the most. [READ SCALE AS NEEDED]

n=1,409

| RANDOMIZE | | Very Satisfied | Somewhat Satisfied | Neither Sat. or Diss. | Somewhat Dissat. | Very Dissatisfied | (DON'T READ) DK/NA |
|-----------|---|----------------|--------------------|-----------------------|------------------|-------------------|--------------------|
| A. | Closeness to home..... | 58% | 26% | 9% | 5% | 2% | 1% |
| B. | Availability of parking..... | 32% | 24% | 15% | 7% | 4% | 17% |
| C. | Amount of congestion on roads getting to and from the Airport. | 21% | 34% | 15% | 16% | 10% | 4% |
| D. | Ability to use public transportation to get to the Airport..... | 28% | 21% | 12% | 11% | 14% | 15% |
| E. | Availability of flights to where you want to go..... | 53% | 33% | 5% | 6% | 2% | 1% |
| F. | Availability of low cost flights..... | 21% | 41% | 10% | 16% | 10% | 2% |
| G. | On-time performance of airline flights..... | 39% | 40% | 7% | 9% | 4% | 1% |

SECTION 3 – Perception of Airports and Airport Solution

Questions 8 and 9 Asked of All Respondents (n=2,000)

Now I would like to get your opinion on what should be the regional priority for airports in the Bay Area.

8. I will read you the opinion of two residents who live in the Bay Area. These Bay Area residents disagree about the future of airports in the region. As I read their opinions, please tell me which one is closer to your own opinion.

RANDOMIZE ORDER

The first resident believes that we should expand airports to allow more flights which will keep air travel convenient and affordable and help our regional economy.

The second resident believes that we should **not** expand airports to allow more flights because it will increase noise, congestion and pollution and ultimately hurt our quality of life.

Whose opinion is closer to your own? [REREAD DESCRIPTIONS OF EACH PERSON IF RESPONDENT HESITATES OR IS NOT CLEAR ON THEIR CHOICES]

- 45% First resident [For airport expansion]
- 46% Second resident [Against airport expansion]
- 4% (DON'T READ) Neither
- 4% (DON'T READ) Combination
- 2% (DON'T READ) DK/NA

Given the current economy, overall demand for commercial passenger flights has stopped growing for now, but in the next 10 to 20 years, it is expected that the current airports in the Bay Area will not be able to handle the demand for air travel to and from the Bay Area.

9. Now I would like to ask you about different programs, strategies or facilities that are being considered to deal with the need for increased capacity for commercial passenger airline flights in the Bay Area.

Here's the (first/next) one: _____. (READ ITEM AND ASK:) Would you support or oppose this plan, or are you not sure at this point?

| RANDOMIZE | <u>Support</u> | <u>Not Sure</u> | <u>Oppose</u> | <u>(DON'T READ) Refused</u> |
|--|----------------|---------------------|---------------|-------------------------------------|
| A. Expanding runways at San Francisco and Oakland airports to accommodate more flights----- | 41% | 43% | 16% | 1% |
| [IF Q9A=1 THEN ASK Q10 / IF Q9A=3 THEN ASK Q11 OTHERWISE GO TO NEXT ITEM] | | | | |
| B. Adding commercial airline service at existing, smaller regional airports in the Bay Area that do not currently have commercial passenger air service ----- | 33% | 46% | 20% | 1% |
| [IF Q9B=1 THEN ASK Q12 / IF Q9B=3 THEN ASK Q13 OTHERWISE GO TO NEXT ITEM] | | | | |
| C. Limiting flights to cities in California and having passengers use a high speed rail system to get to destinations in Central and Southern California ----- | 56% | 26% | 17% | 1% |
| [IF Q9C=1 THEN ASK Q14 / IF Q9C=3 THEN ASK Q15 OTHERWISE GO TO NEXT ITEM] | | | | |
| D. Limiting the number of flights during certain hours of the day and requiring airlines to use larger aircraft at the commercial passenger airports ----- | 26% | 55% | 18% | 1% |
| [IF Q9D=1 THEN ASK Q16 / IF Q9D=3 THEN ASK Q17 OTHERWISE GO TO NEXT ITEM] | | | | |

Expanding runways at San Francisco and Oakland airports to accommodate more flights

Q10 Only Asked of those who Supported Expanding Runways in Q9a (n=819)

10. Would you still support expanding runways if you knew it would require filling in parts of the Bay?

- 54% Yes, I would still support expanding runways
- 23% Not Sure
- 23% No, I would not still support expanding runways if it required filling in parts of the Bay
- 1% (Don't Read) DK/NA

Q11 Only Asked of those who Opposed Expanding Runways in Q9a (n=314)

11. What is your biggest concern about expanding runways at San Francisco and Oakland airports to accommodate more flights? [DO NOT READ RESPONSES, NOTE FIRST TWO RESPONSES – THIS IS AN OPEN ENDED QUESTION]

- 24% Pollution generated from airport
- 19% Filling in parts of the Bay
- 18% Increase in congestion, traffic, more people
- 15% Do not need to expand runway
- 12% Noise from more aircraft operations
- 12% Effects on marine life in the Bay
- 11% Financial concern, cost of expansion too high, impact on taxpayers
- 10% Effects on water quality in the Bay
- 3% Need to expand alternative forms of public transit
- 2% Safety concern
- 2% I don't use those airports/ would rather see it at other airports
- 1% Would take away land for housing
- 2% Other (please specify_____)
- 4% DK/NA

Adding airline service at existing, smaller regional airports in the Bay Area that do not currently have commercial passenger air service

Q12 Only Asked of those who Supported Adding Service at Regional Airports at Q9b (n=654)

12. Would you still support adding airline service if you knew the service would be added to airports such as Santa Rosa, Napa, Concord, Livermore, Travis Air Force Base in Fairfield or Moffett Federal Airfield in Mountain View?

- 83% Yes, I would still support adding airline service
- 10% Not Sure
- 5% No, I would not still support adding airline service knowing the airports that could have commercial service added
- 2% (Don't Read) DK/NA

Q13 Only Asked of those who Opposed Adding Service at Regional Airports at Q9b (n=405)

13. What is your biggest concern about adding airline service at existing, smaller regional airports in the Bay Area that do not currently have commercial passenger air service? [DO NOT READ RESPONSES, NOTE FIRST TWO RESPONSES – THIS IS AN OPEN ENDED QUESTION]

- 38% Increase in congestion, traffic, more people in vicinity
- 20% Noise from more aircraft operations
- 17% Pollution generated from airport
- 16% Not necessary/ not needed
- 7% Smaller airports' infrastructure unable to handle additional services
- 7% Financial concern/ would cost too much
- 5% New airports would be too close to home
- 4% Safety concerns, smaller airports not as safe
- 3% Not enough land/ would have to eliminate homes
- 2% Flight delays/ fewer flights
- 1% Would rather put money toward other priorities/ invest in high speed rail
- 1% New airports would not be close enough
- 1% Expand the main airports
- 1% Would eliminate open space/ views of skyline
- 1% Would be inconvenient
- 2% Other (please specify _____)
- 6% DK/NA

Limiting flights to cities in California and having passengers use a high speed rail system to get to destinations in Central and Southern California

Q14 Only Asked of those who Supported Limiting Flights and Using High Speed Rail at Q9c (n=1,115)

14. Would you still support limiting flights to cities in California and have passengers use High Speed Rail, if you knew that High Speed Rail would cost about the same as air travel but would take 2 and a half hours to get to Southern California?

- 79% Yes, I would still support limiting flights in California and having passengers use High Speed Rail
- 12% Not Sure
- 8% No, I would not still support limiting flights in California and having passenger use High Speed rail if it took 2 and half hours to get to Southern California and cost the same as air travel
- 1% (Don't Read) DK/NA

Q15 Only Asked of those who Opposed Limiting Flights and Using High Speed Rail at Q9c (n=338)

15. What is your biggest concern about limiting flights to cities in California and having passengers use a high speed rail system to get to destinations in Central and Southern California? [DO NOT READ RESPONSES, NOTE FIRST TWO RESPONSES – THIS IS AN OPEN ENDED QUESTION]

- 37% Cost to taxpayers/state too high
- 15% It would take too long to get to other destinations
- 12% Do not want transportation choices regulated nor mandated
- 11% Do not need High Speed Rail
- 8% More convenient to fly/rail inconvenient
- 7% Decreased number of available flights
- 7% Do not like High Speed Rail
- 3% Don't think High Speed Rail will actually happen/ be built
- 2% Increase in congestion, traffic, more people
- 1% Pollution generated from High Speed Rail
- 1% Should have both flights and High Speed Rail
- 1% Should fix freeways first
- 1% Safety concern
- 3% Other (please specify_____)
- 5% DK/NA

Limiting the number of flights during certain hours of the day and requiring airlines to use larger aircraft at the commercial passenger airports

Q16 Only Asked of those who Supported Limiting Flights and Requiring Airlines to Use Larger Aircraft at Q9d (n=513)

16. Would you 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?

- 41% Yes, I would still support limiting flights at certain hours of the day
- 20% Not Sure
- 38% No, I would not still support limiting flights at certain hours of the day if it limited my ability to find the flights I needed and increased the cost of flying
- 2% (Don't Read) DK/NA

Q17 Only Asked of those who Opposed Limiting Flights and Requiring Airlines to Use Larger Aircraft at Q9d (n=369)

17. What is your biggest concern about limiting the number of flights during certain hours of the day and requiring airlines to use larger aircraft at the commercial passenger airports? [DO NOT READ RESPONSES, NOTE FIRST TWO RESPONSES – THIS IS AN OPEN ENDED QUESTION]

- 37% Decreased number of flights available
- 13% Don't like pollution/noise from bigger planes
- 11% Do not agree with government regulation of airlines
- 10% Increased cost of flying
- 9% Larger aircrafts not safe
- 8% Do not need larger aircraft
- 7% Increase in congestion, traffic, people
- 2% Do not like larger aircrafts
- 1% Airlines are already struggling/ this would reduce profitability
- 1% More fuel would be needed for larger aircraft
- 1% Airlines may stop offering service in Bay Area if larger aircraft required
- 1% Don't think it will work
- 2% Other (please specify_____)
- 10% DK/NA

Q18 Percentages Based on all 2,000 Respondents

18. Which of the strategies (FROM Q10, Q12, Q14, Q16 – SEE PROGRAMMING BELOW) should be the highest priority?

INSERT Q9A IF Q10=1, Q9B IF Q12=1, Q9C IF Q14=1, Q9D IF Q16=1. IF ONLY ONE SUPPORTED FROM Q10, Q12, Q14, OR Q16, DO NOT ASK AND INSTEAD AUTO CODE.

IF NO SUPPORT IN Q10, Q12, Q14, OR Q16 (NONE EQUAL 1), THEN PIPE IN Q9A IF Q9A=1, Q9B IF Q9B=1, Q9C IF Q9C=1, Q9D IF Q9D=1. IF ONLY ONE SUPPORTED FROM Q9A-D, DO NOT ASK AND INSTEAD AUTO CODE.

- 16% Expanding runways at San Francisco and Oakland airports to accommodate more flights (Q9a)
- 17% Adding airline service at existing, smaller regional airports that do not currently have commercial service (Q9b)
- 42% Limiting flights to cities in California and having passengers use a high speed rail system (Q9c)
- 7% Limiting the number of flights during certain hours of the day and requiring airline to use larger aircraft (Q9d)
- 3% (Don't Read) DK/NA
- 15% None, did not support any of the strategies in Q9a-d

SECTION 4 – Demographics

Now I have just a few final questions for statistical purposes only.

A. Do you regularly commute to work or school?

- 64% Yes (GO TO QB)
- 35% No (SKIP TO QC)
- 1% (Don't Read) DK/NA (SKIP TO QC)

Demographic B Only Asked of those who Regularly Commute (n=1,287)

B. How do you normally get to work or school? (IF HESITATE, READ – MULTIPLE RESPONSES OK):

- 71% Drive alone
- 16% Carpool/vanpool
- 13% BART
- 12% Bus
- 7% Bike
- 6% Walk
- 3% Cal Train
- 2% Train/ Light rail (VTA, MUNI, ACE)
- 1% Motorcycle
- 1% Ferry
- 1% Shuttle (employer, BART station)
- 1% Other (Specify_____)
- 0% (Don't Read) DK/NA

C. How many children under the age of 18 live in your household?

- 15% One
- 14% Two
- 5% Three or more
- 66% None
- 1% (Don't Read) Refused

D. What ethnic group do you consider yourself a part of or feel closest to?

- 9% Latino(a) or Hispanic
- 14% Asian
- 5% African American or Black
- 1% Pacific Islander
- 63% White
- 4% Other (Specify_____)
- 5% (Don't Read) Refused

E. Do you currently rent or own your home?

| | |
|-----|--------------------|
| 31% | Rent |
| 65% | Own |
| 4% | (Don't Read) DK/NA |

F. Lastly, I am going to read some income categories. Please stop me when I reach the category that best describes your total household income before taxes.

| | |
|-----|------------------------|
| 9% | Under \$25,000 |
| 14% | \$25,000 to \$49,999 |
| 15% | \$50,000 to \$74,999 |
| 14% | \$75,000 to \$99,999 |
| 16% | \$100,000 to \$149,999 |
| 17% | \$150,000 or more |
| 16% | (Don't Read) DK/NA |

**Those are all of the questions I have for you.
Thank you very much for participating!**

G. Gender (Recorded from voice, not asked):

| | |
|-----|--------|
| 45% | Male |
| 55% | Female |

H. Interview Language:

| | |
|-----|-----------|
| 98% | English |
| 1% | Spanish |
| 2% | Cantonese |

INFORMATION FROM VOTER SAMPLE (NOT ASKED)

I. Age

| | |
|-----|--------------------|
| 17% | 18 to 29 years old |
| 17% | 30 to 39 years old |
| 19% | 40 to 49 years old |
| 28% | 50 to 64 years old |
| 18% | 65 years or older |
| 1% | Not coded |

J. Individual Party Type

| | |
|-----|------------|
| 53% | Democrat |
| 19% | Republican |
| 4% | Other |
| 24% | DTS |

K. Household Party Type

| | |
|-----|-----------------|
| 29% | Democrat (1) |
| 15% | Democrat (2+) |
| 7% | Republican (1) |
| 7% | Republican (2+) |
| 16% | Other (1) |
| 5% | Other (2+) |
| 20% | Mixed |

L. Voter Propensity

| | |
|-----|--------|
| 34% | High |
| 21% | Medium |
| 45% | Low |

M. Likely Vote by Mail (Absentee)

| | |
|-----|-----|
| 55% | Yes |
| 45% | No |

N. County

| | |
|-----|---------------|
| 22% | Alameda |
| 14% | Contra Costa |
| 4% | Marin |
| 2% | Napa |
| 13% | San Francisco |
| 11% | San Mateo |
| 22% | Santa Clara |
| 5% | Solano |
| 7% | Sonoma |

O. Survey Type

| | |
|-----|-------|
| 90% | Phone |
| 11% | Web |