

PSRC Aviation Baseline Study Survey Report



Public input

The Regional Aviation Baseline Study team collected input through 4 primary methods:

Survey

- Statistically valid survey of residents in the four-county region
- 1,416 respondents

Interviews with residents of the four-county region

- Replaced focus groups (due to COVID-19)
- 22 interviews

Poll questions and comments through our online open house

- Online open house opened September 21
- Will run through October 31
- 377 participants as of October 19

Poll questions at virtual public meetings

- Three public meetings: September 23, 29, and 30
- 176 participants total



Key themes

- Survey respondents tended to prioritize meeting demand for aviation service and prioritized economic benefits of aviation to the region.
- Interview participants tended to prioritize meeting demand for aviation service and prioritized both economic benefits of aviation to the region and minimizing environmental impacts
- Virtual public meeting participants tended to prioritize noise and environmental impacts, but participants at each meeting said the region should still meet at least some of the projected demand
- Online open house participants were most vocal about environmental impacts and noise from aviation
- **Consistent theme:** For each input method, participants favored dispersing service throughout the region rather than increase capacity at Sea-Tac or build a new airport.
- **Key difference between these groups:** Survey and interview participants were randomly selected to provide a representative sample of the four-county region, while attendees at the virtual open house or participants of the online open houses self selected, likely because of an interest in aviation issues.



Key findings: Survey

- In open-ended answers, respondents noted benefits of the aviation system, reported that increased demand personally impacted them and acknowledged positive and negative impacts of passenger aviation
- Respondents said the aviation system is working well, and think it is important for the region to accommodate growing future demand.
- Respondents said cost of flying, getting through security lines, access to the airport, and on-time performance are the most important features for the regional aviation system.
- Residents perceive that cost of flying, environmental impacts, noise impacts, and parking availability have gotten worse in the last three years – Snohomish County residents had a more favorable view, likely because of new service at Paine Field
- Most survey respondents prioritized:
 - Increasing passenger airline service over no increase to aviation impacts.
 - Accommodate additional passenger service at existing airports over building a new airport in the region or increasing capacity at Sea-Tac.
 - Distribute environmental and noise impacts around several airports in the region over consolidating the impacts.



Key findings: Interviews

- Interview participants prioritized meeting growing aviation demand
- Participants thought economic benefits and environmental impacts were equally important, and thought they were not mutually exclusive
- A number of participants said government should be focused on solving issues impacting the environment; participants also noted that the aviation industry is already taking steps toward mitigating environmental impacts
- Participants thought addressing noise issues was less important than meeting demand, minimizing environmental impacts, and maximizing economic benefits
- Several participants drew a connection between a strong economy and having money to help the environment
- Several participants noted the importance for economic benefits of aviation to help with the COVID-19 recovery
- Most participants preferred expanding service at multiple airports around the region



Key findings: Virtual public meetings

- At all three meetings, participants said minimizing noise and environmental impacts of aviation was most important to them
- At all three meetings, participants said maximizing economic benefits of the aviation industry was least important to them
- At two of the meetings, participants said the region should meet some but not all demand for commercial aviation; at one meeting, there was a tie between meet all and meet some but not all demand
- At all three meetings, participants said new service should be dispersed at multiple airports around the region
- Questions at all three meetings were focused on study and mitigation for specific aviation impacts, such as noise and PM 2.5
- Many participants had specific questions about potential expansion of service at Paine Field

1. In considering the region's plans to manage the growing demand for aviation, what is most important to you?



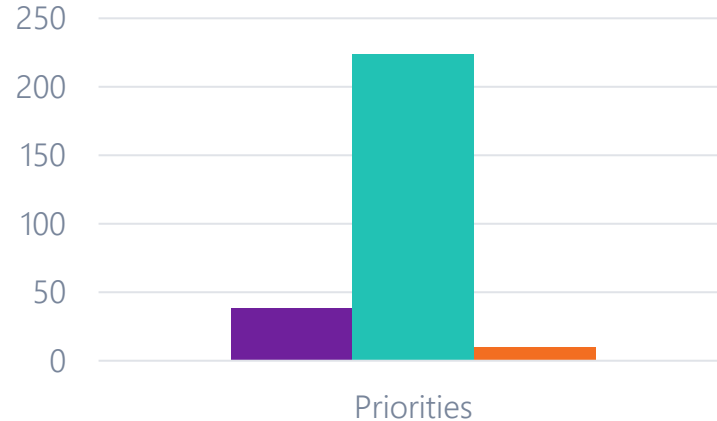
Results from one of the poll questions during the September 23 virtual public meeting.



Key findings: Online open house

- A large majority of respondents thought the region should not expand aviation capacity at all
- Respondents were more or less split on distributing aviation capacity at multiple airports around the region or consolidating capacity at one airport
- Many comments were concerns about aviation's contribution to climate change
- Many comments were concerns or frustration about noise from current flight paths

Top priorities



- On-time, easy access to passenger service
- Minimizing noise and environmental impacts of aviation
- Maximizing economic benefits of the aviation industry



Survey Report



Themes in open-ended responses



Benefits of passenger aviation

Question: If someone new to the area asked you before the current COVID-19 situation what are the top three benefits passenger aviation provides to the central Puget Sound region, what would you have told them?

59% of sampled respondents mentioned **travel benefits**, such as destination options and time savings and affordability from flying.

24% of sampled respondents mentioned **economic benefits**, such as job creation, the tourist industry, participation in global commerce, and business activity and travel.

27% of sampled respondents mentioned **easy access to a variety of airports**.



Impacts from passenger aviation

Question: What if that same person asked you before the current COVID-19 situation what the top three impacts of passenger aviation are to the central Puget Sound region, what would you have told them?

Positive Impacts

27% of sampled respondents mentioned employment/business benefits, such as greater employment opportunities and economic benefits.

13% of sampled respondents mentioned travel options and convenience.

Negative Impacts

49% of sampled respondents mentioned environmental impacts.

45% of sampled respondents mentioned increased traffic accessing the airport and long waits for security, boarding, and luggage pickup.

20% of sampled respondents mentioned quality of experience at the airport/on the airplane, such as flight delays, crowded flights, and difficulty parking or accessing the airport.



Personal impacts

Question: Over the past few years, passenger aviation activity has increased in the central Puget Sound region by 18% (from 42 million to 52 million passengers). How has this impacted you?

40% of sampled respondents report having **difficulty with access to airport**. Main concerns include traffic congestions, longer waits, parking, and lack of mass transit options.

35% of sampled respondents reported concerns related to **crowdedness at the airport/on the airplane**, including fewer seats and increases in ticket prices.

35% of sampled respondents reported concerns related to **environmental impacts**



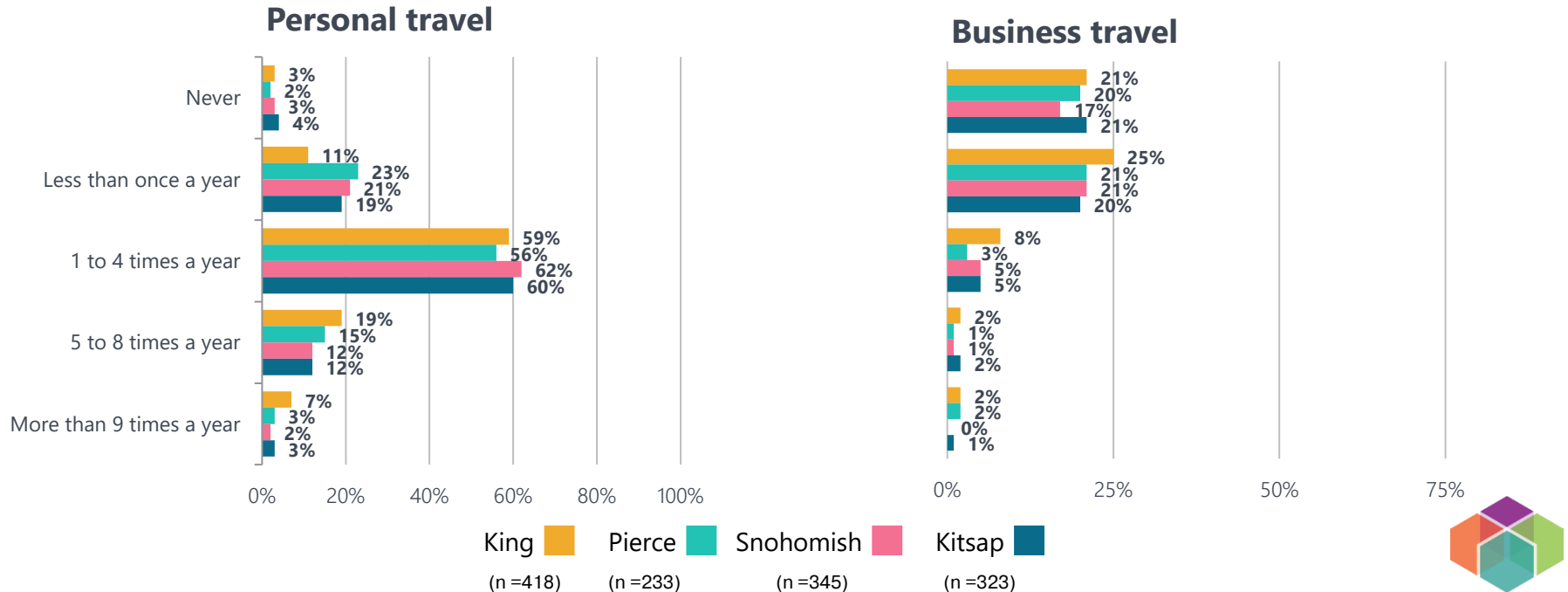
Flying Behavior and Attitudes Toward Aviation Services



Respondents use airports more for personal travel than business

How often do you typically fly each year for...

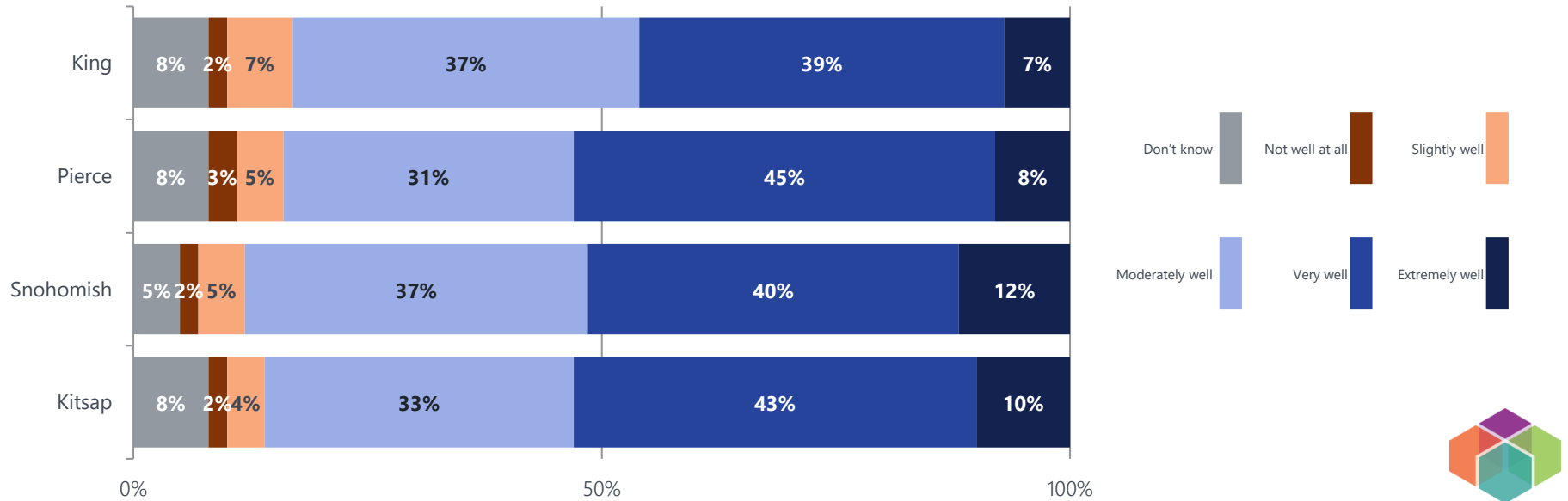
Base: all respondents.



Overall, respondents agreed that the aviation system is working well

Overall, how well do you think the passenger aviation system in the central Puget Sound region was working prior to the COVID-19 situation?

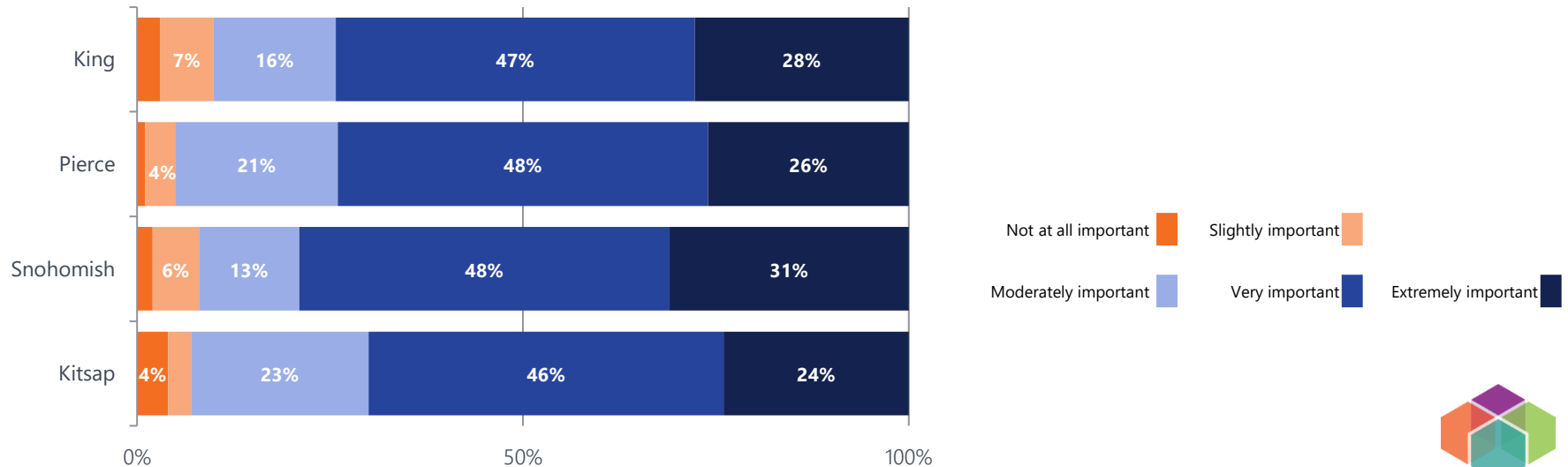
Base: all respondents (n = 1316)



People in all four counties think it is important for the region to accommodate growing future demand for passenger aviation service

How important do you think it is for the central Puget Sound region to be able to accommodate growing future demand for passenger aviation service?

Base: all respondents (n = 1315)



Level of Importance Toward Nine Aviation Features



Residents in the four-county region think **cost of flying, access to airport, getting through security lines, and on-time performance** are the most important features for the aviation system

King	Pierce	Snohomish	Kitsap
<ol style="list-style-type: none">1. Getting through security lines2. On-time performance3. Cost of flying4. Amount of service to a variety of destinations5. Access to airports	<ol style="list-style-type: none">1. Cost of flying2. Getting through security lines3. Access to airports4. Amount of service to a variety of destinations5. On-time performance	<ol style="list-style-type: none">1. Cost of flying2. Access to airports3. Getting through security lines4. On-time performance5. Economic benefits	<ol style="list-style-type: none">1. Cost of flying2. Access to airports3. Getting through security lines4. On-time performance5. Amount of service to a variety of destinations

- Among Pierce, Snohomish, and Kitsap County residents, the top three most important aviation features are cost of flying, access to airports, and getting through security lines.
- Among King County residents, the top three most important aviation features are getting through security lines, on-time performance, and cost of flying.

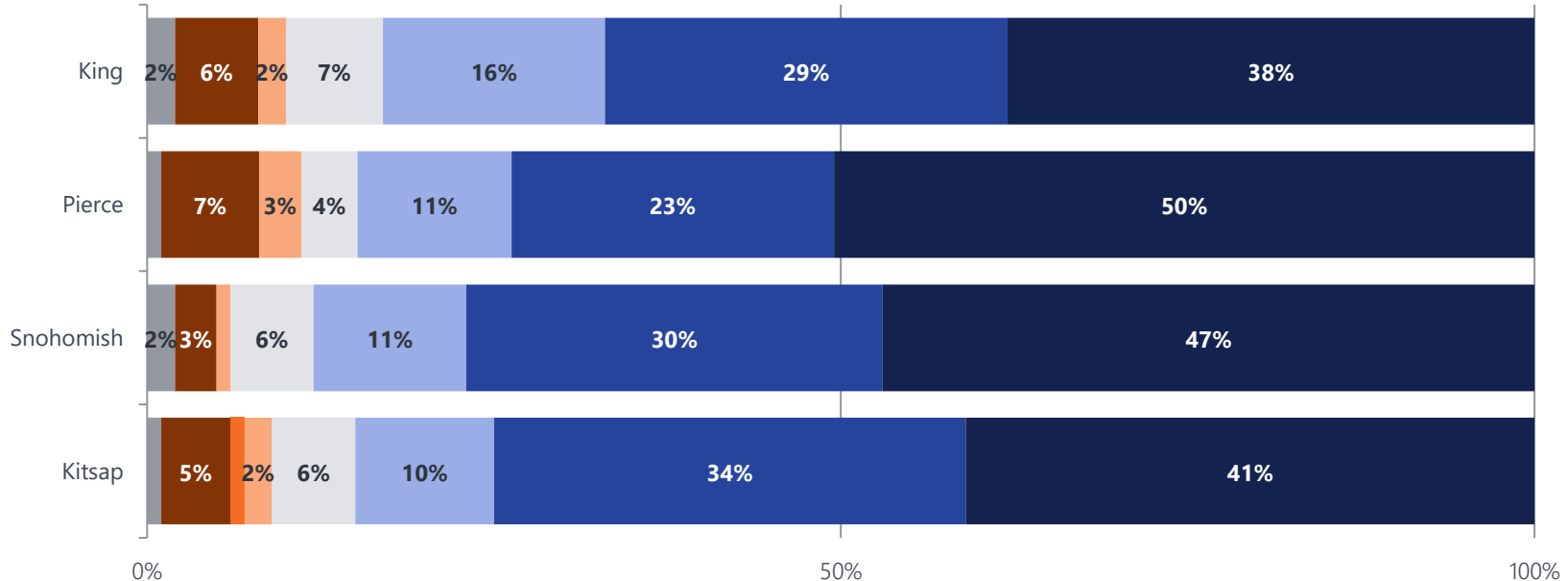


The **cost of flying** is important to people in all four counties (38-50% said it was very important)

How important to you is cost of flying?

Base: all respondents. (n = 1286)

Very unimportant  Very important  Don't know

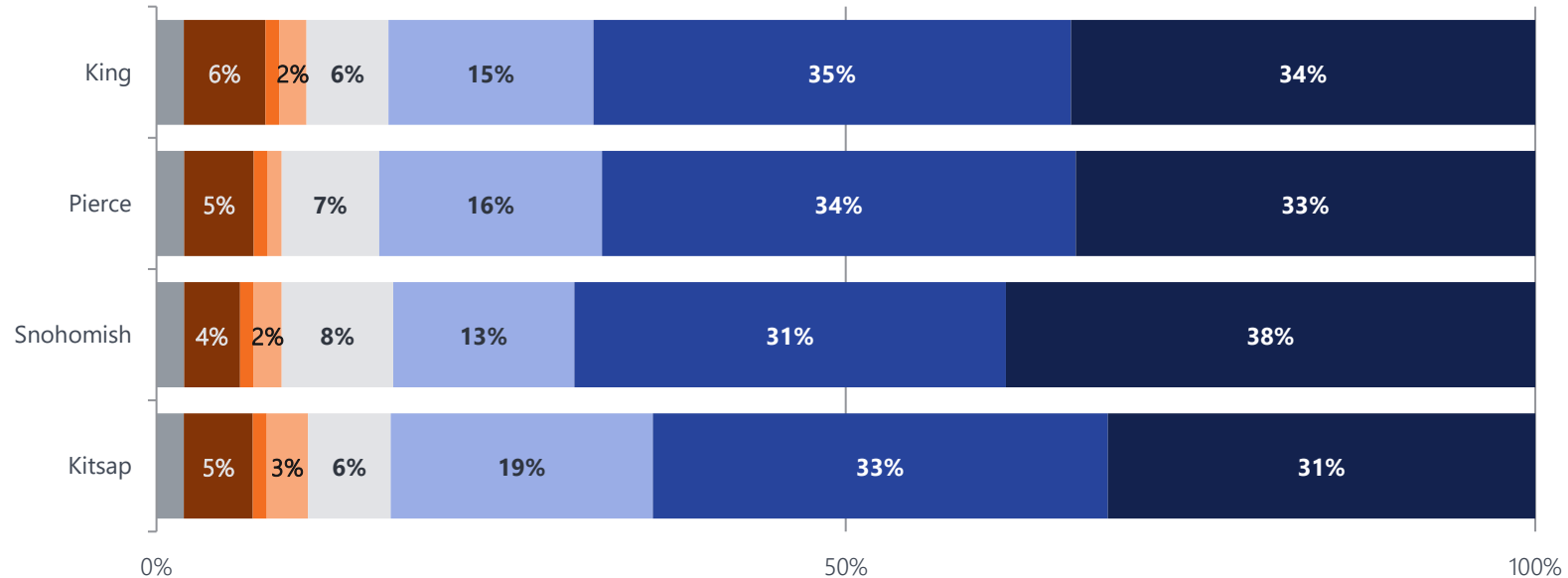


The amount of service to a variety of destinations is important to people in all four counties (31%-38% said it was very important)

How important to you is amount of service to a variety of destinations?

Base: all respondents. (n = 1287)

Very unimportant Very important Don't know

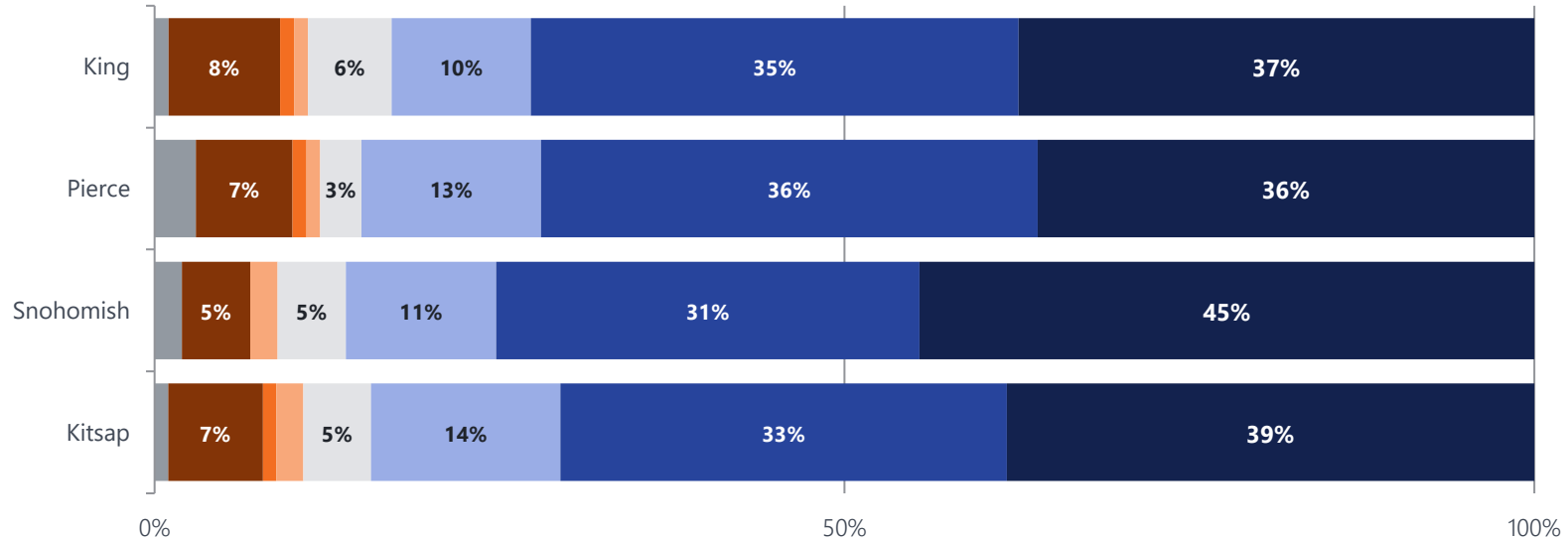


Access to the airport is important to people in all four counties (36%-45% said it was very important)

How important to you is access to airports?

Base: all respondents. (n = 1288)

Very unimportant Very important Don't know

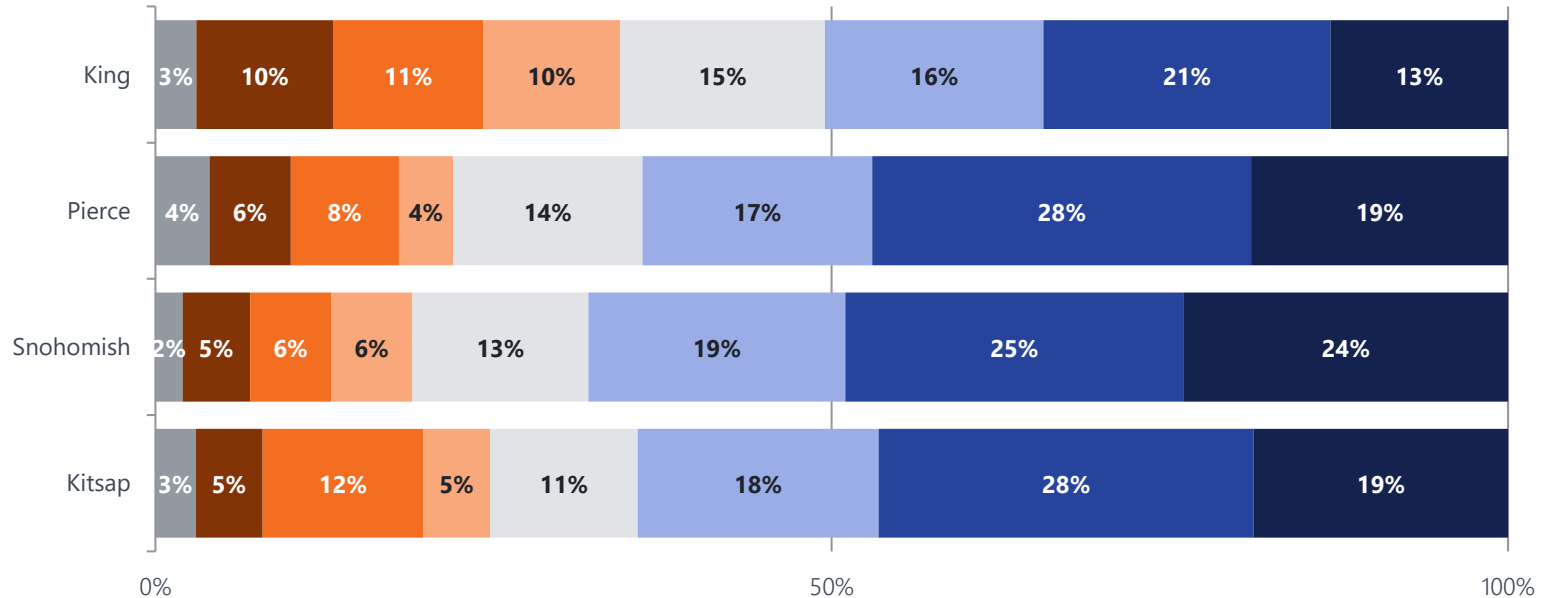


Parking availability is important to people but less important than the first three features (King County residents perceived as slightly less important)

How important to you is parking availability?

Base: all respondents. (n = 1298)

Very unimportant Very important Don't know

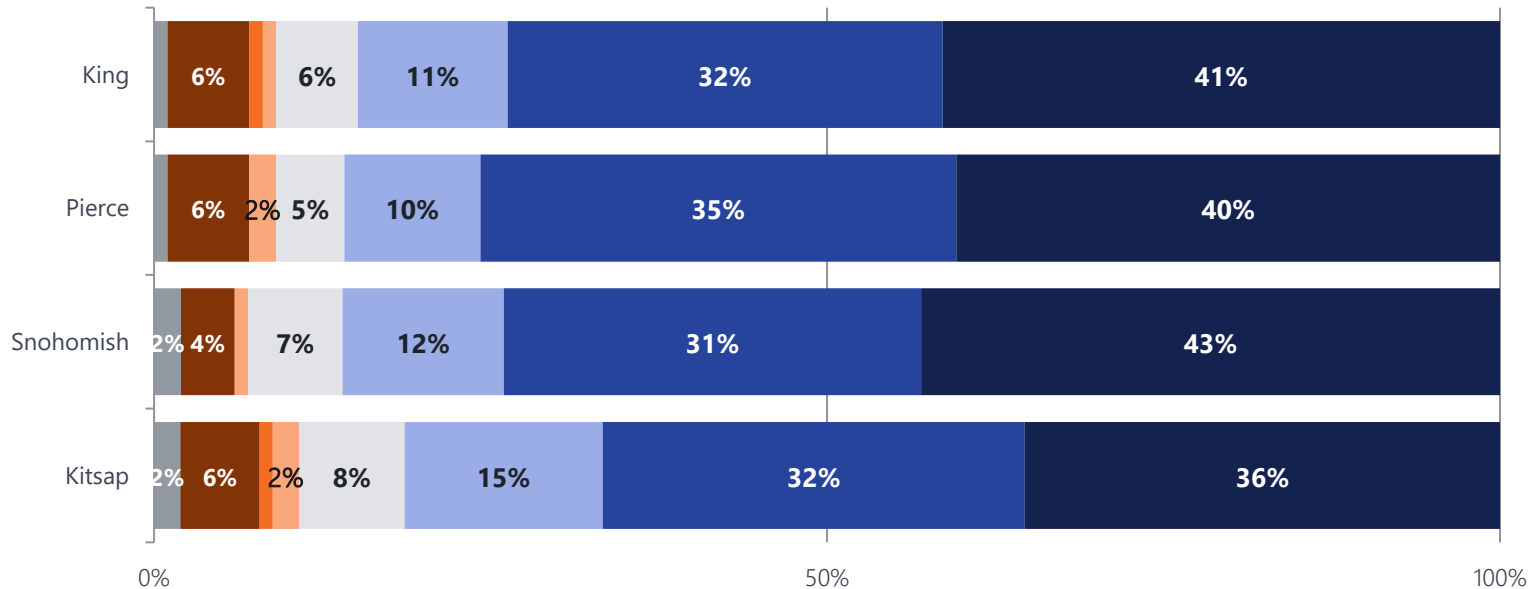


Getting through the security is important to respondents in all four counties (36%-43% said it was very important)

How important to you is getting through security?

Base: all respondents. (n = 1291)

Very unimportant Very important Don't know

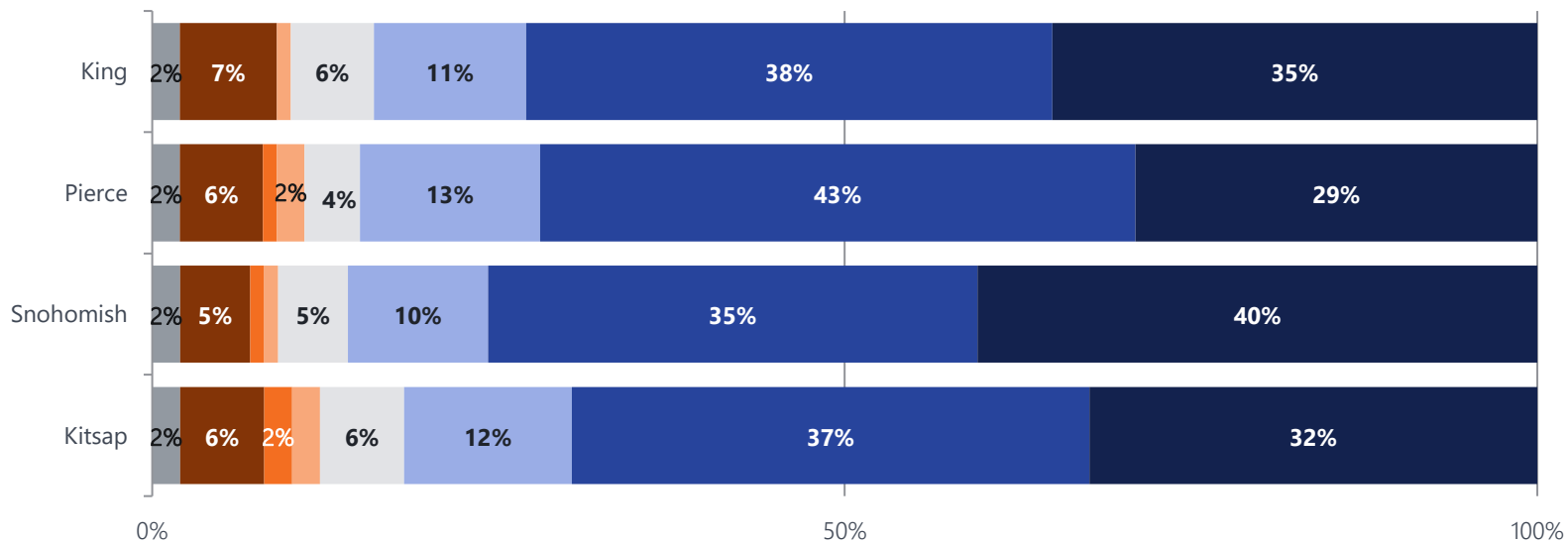


On-time performance is important to people in all four counties (29%-40% said it was very important)

How important to you is on-time performance?

Base: all respondents. (n = 1287)

Very unimportant Very important Don't know

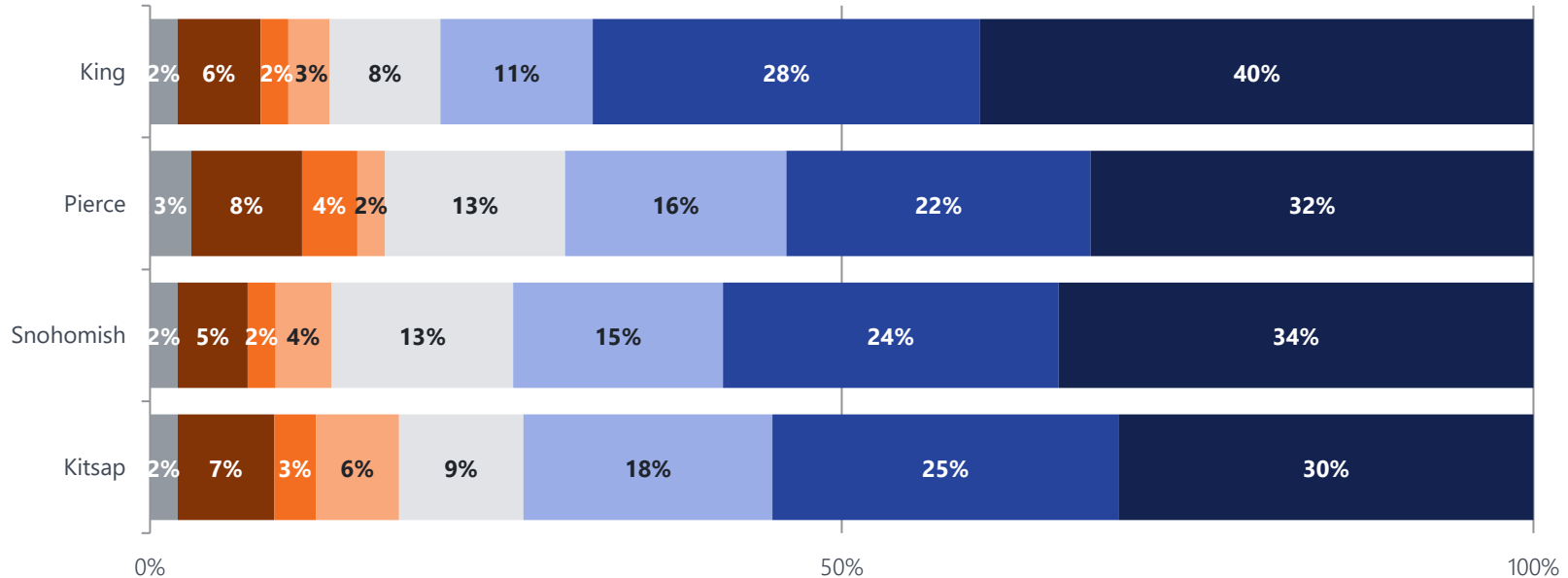


Environment impacts are important to survey respondents (30%-40% said it was very important)

How important to you are environmental impacts?

Base: all respondents. (n = 1288)

Very unimportant Very important Don't know

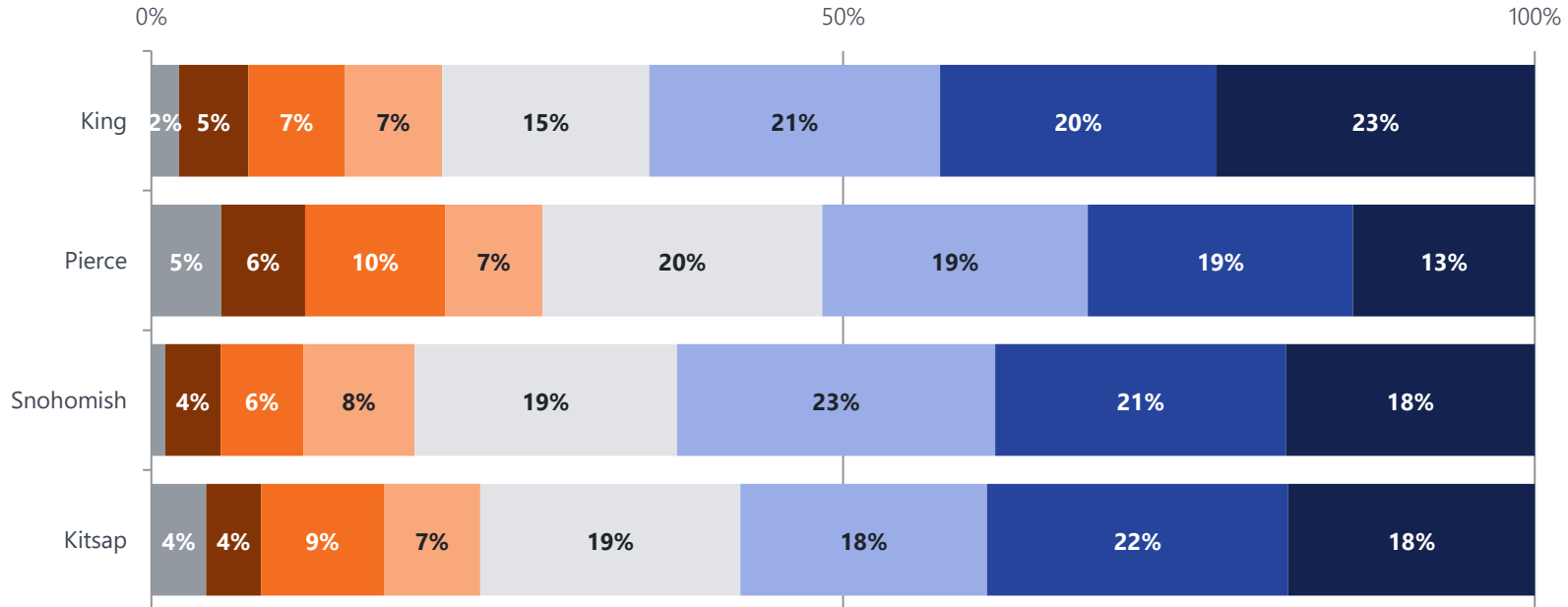


Noise impacts are important to respondents but much less so than other aspects, with Pierce County residents ranking it the least important

How important to you are noise impacts?

Base: all respondents. (n = 1285)

Very unimportant Very important Don't know

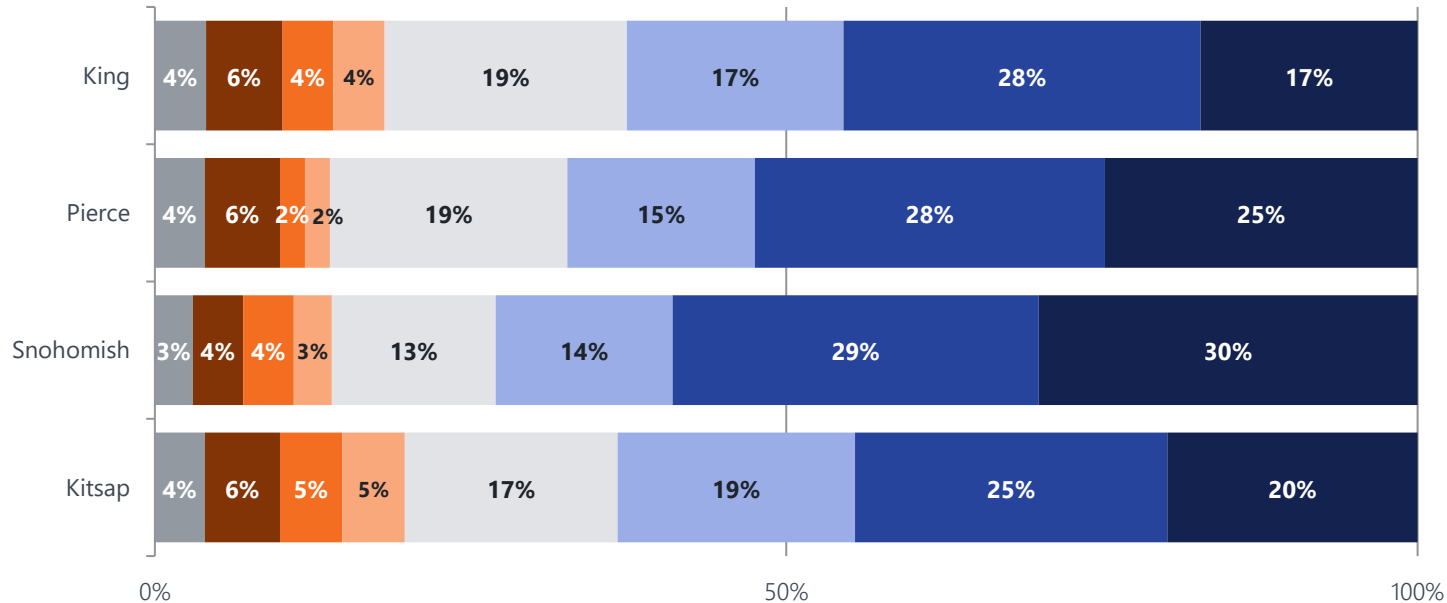


Economic benefits are important but less so than other aspects, with Snohomish County ranking it higher than other counties

How important to you are economic benefits?

Base: all respondents. (n = 1289)

Very unimportant Very important Don't know



Perceptions (Worse/Same/Better) Toward Nine Aviation Features



Residents in the four-county region think **cost of flying, environmental impacts, noise impacts, and parking availability** have gotten worse in the last three years

King

1. Environmental impacts
2. Noise impacts
3. Parking availability

Pierce

1. Cost of flying
2. Access to airports
3. Parking availability

Snohomish

1. Noise impacts
2. Environmental impacts
3. Cost of flying

Kitsap

1. Cost of flying
2. Noise impacts
3. Environmental impacts

- Among King and Snohomish County residents, the top two features perceived to have gotten worse in the last three years are environmental and noise impacts.
- Among Pierce and Kitsap County residents, the top one feature perceived to have gotten worse in the last three years is cost of flying.



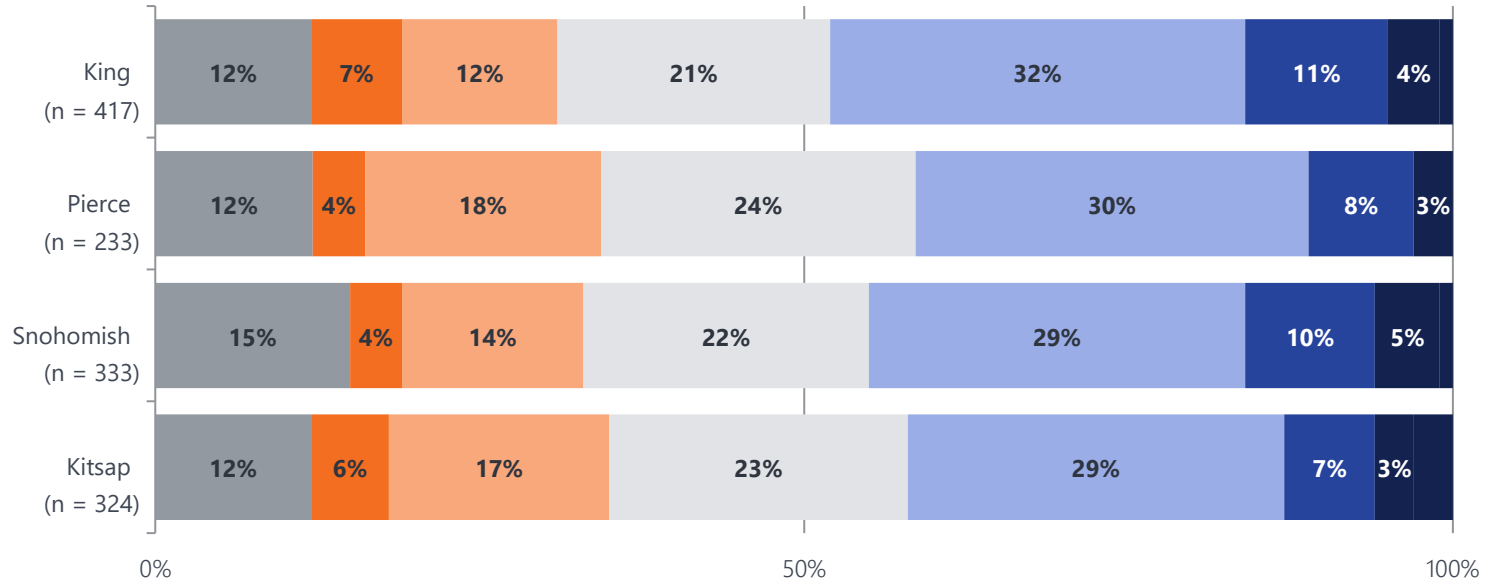
Generally, respondents said the **cost of flying** has improved in the last three years

Has the cost of flying gotten better, stayed the same, or gotten worse in the last 3 years?

Much worse Much better


Don't know

Base: all respondents. (n = 1307)

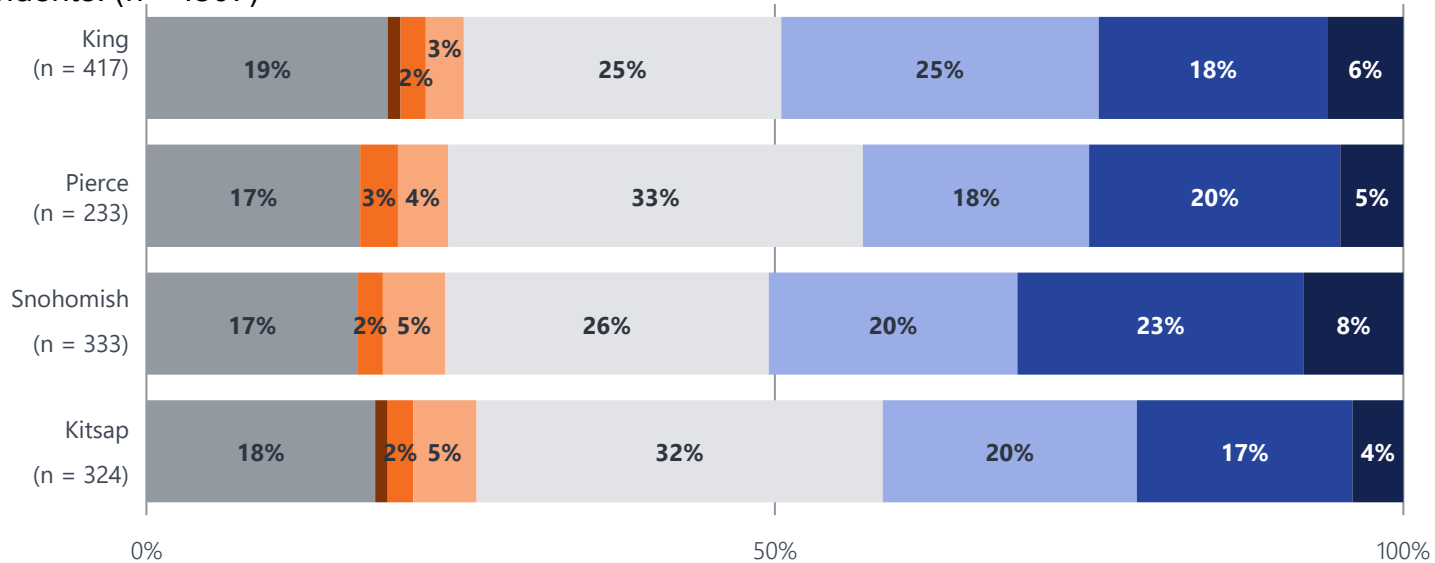


A majority of survey respondents think **the amount of service** destinations has improved, while many think it has stayed the same (25-32%)

Has the amount of service to a variety of destinations gotten better, stayed the same, or gotten worse in the last 3 years?

Much worse       Much better  Don't know








Base: all respondents. (n = 1307)

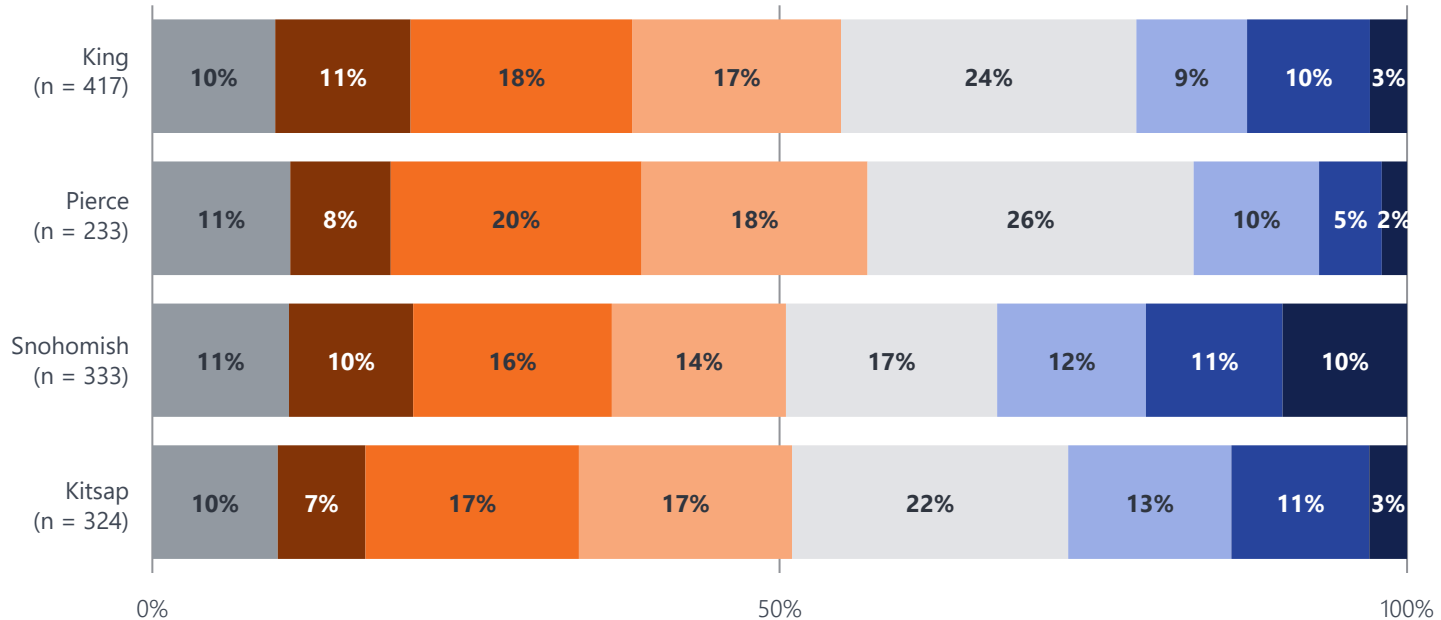


In all counties, respondents think **accessing the airport** has worsened in the past three years

Has access to airports gotten better, stayed the same, or gotten worse in the last 3 years?

Base: all respondents. (n = 1307)

Much worse       Much better  Don't know

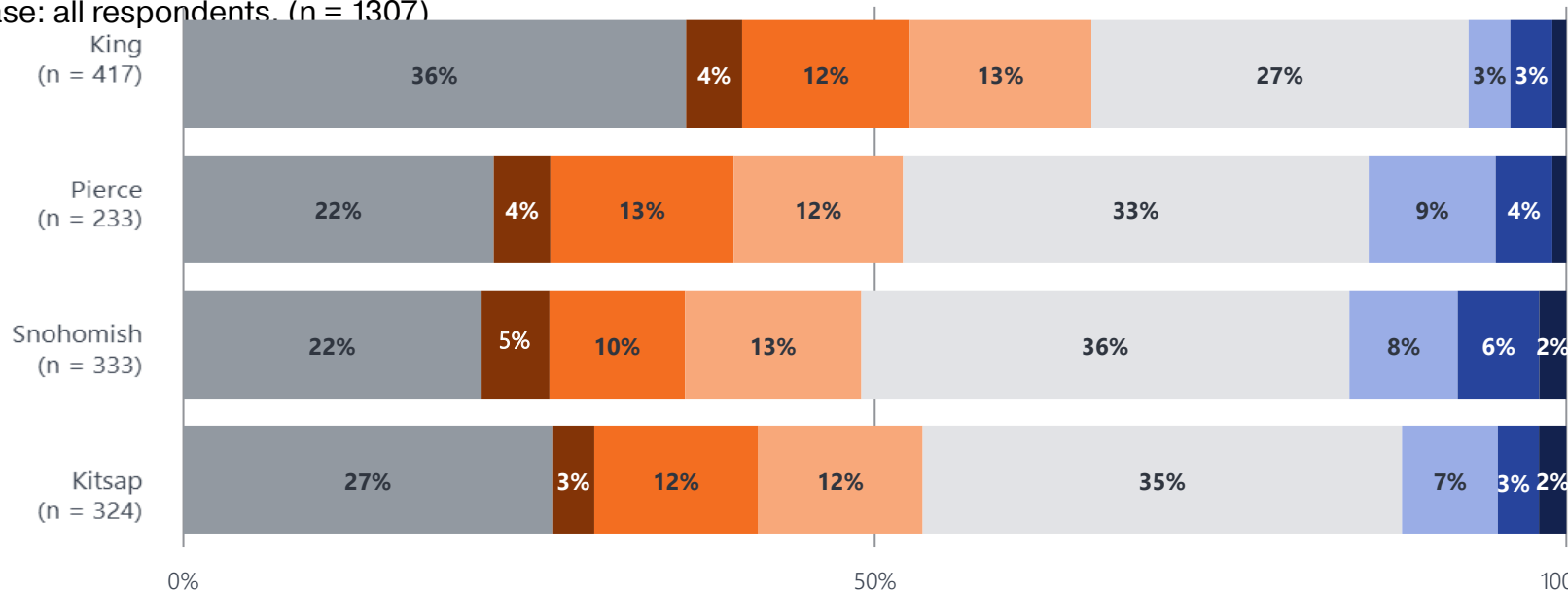


Respondents think **parking availability** has stayed the same (27-36%) or don't know of the changes (22-36%) in the past three years

Has parking availability at the airport gotten better, stayed the same, or gotten worse in the last 3 years?

Much worse Much better Don't know

Base: all respondents. (n = 1307)

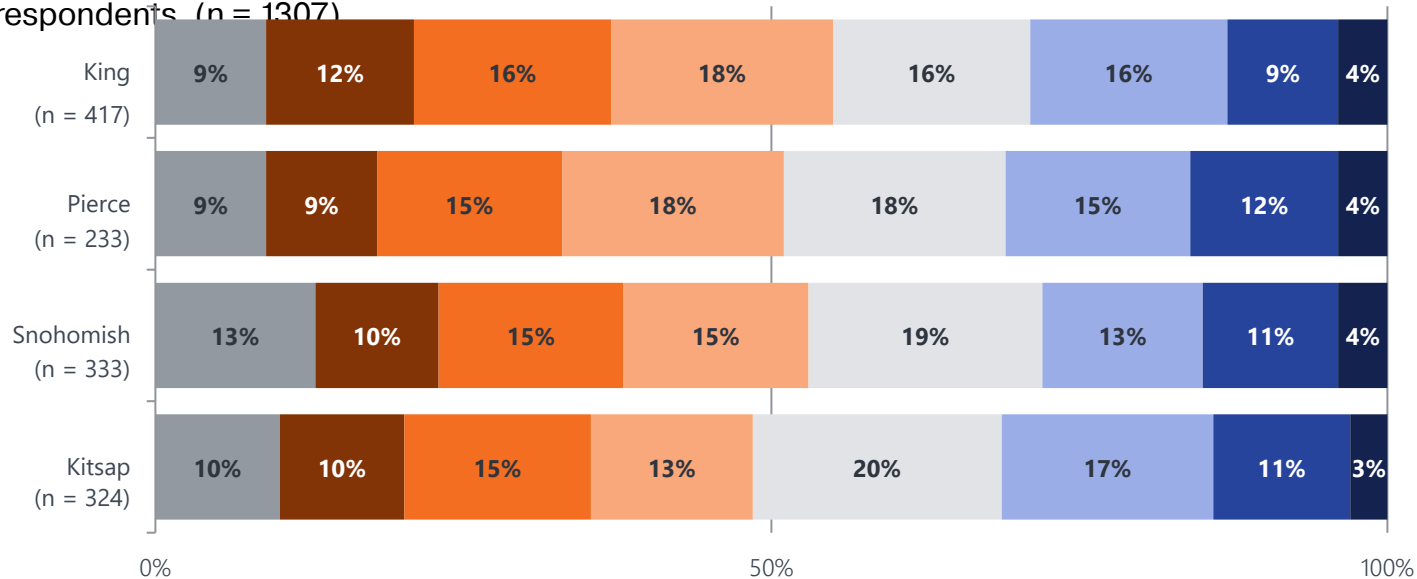


In all counties, respondents think **getting through security lines** has gotten worse in the last 3 years

Has getting through security gotten better, stayed the same, or gotten worse in the last 3 years?

Much worse Much better Don't know

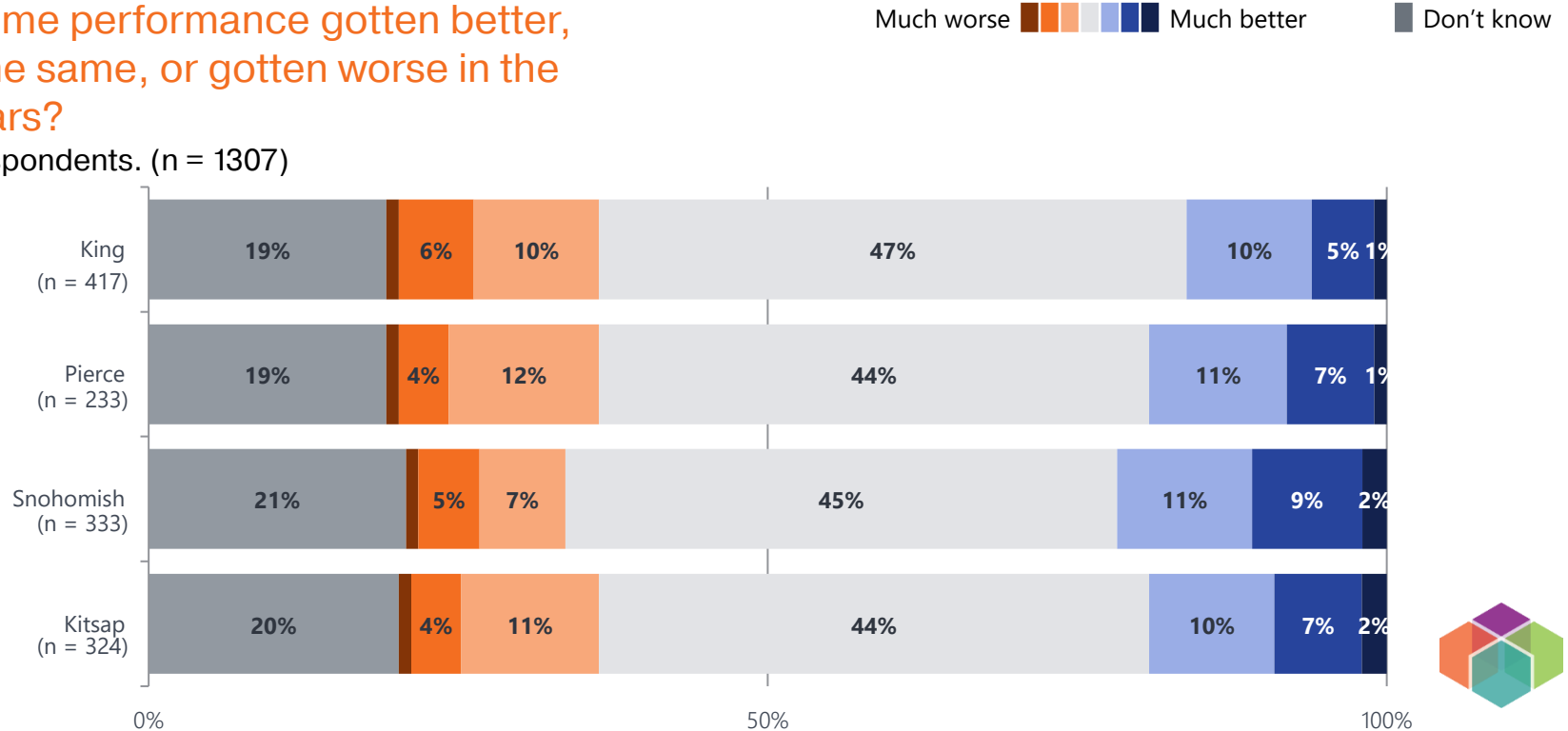
Base: all respondents (n = 1307)



In all counties, respondents think **on-time performance** has stayed the same (44-47%) in the past three years

Has on-time performance gotten better, stayed the same, or gotten worse in the last 3 years?

Base: all respondents. (n = 1307)

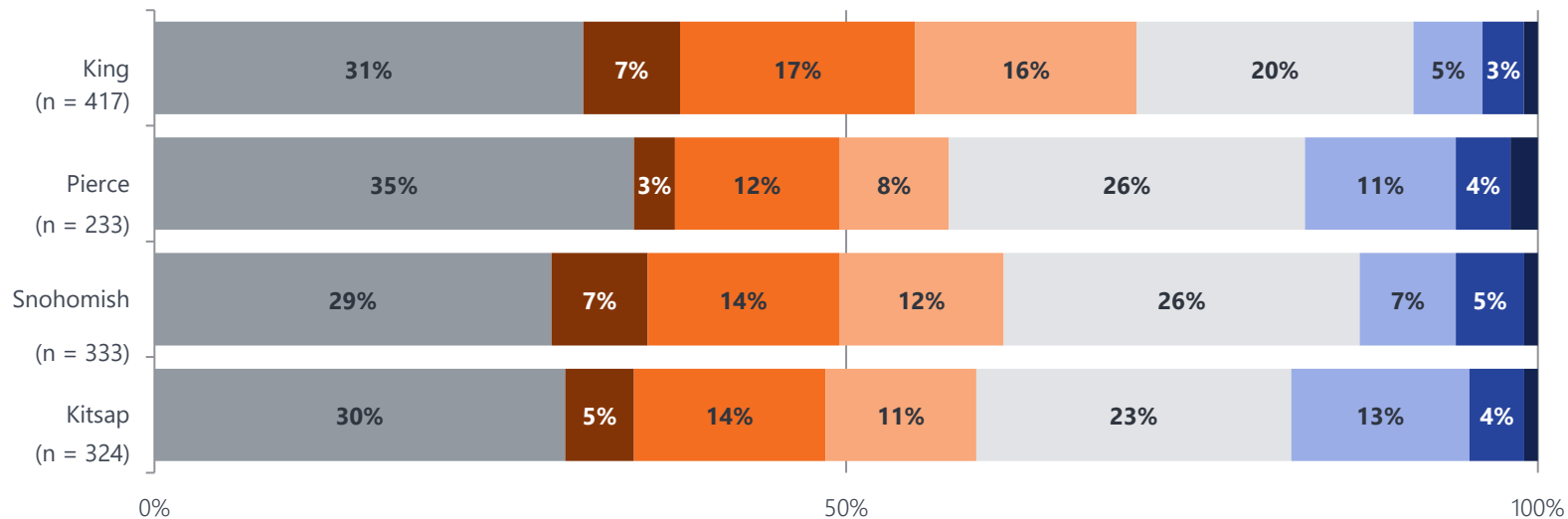


One third of the respondents don't know if **environmental impacts** have gotten worse or better in the past three years

Has the environmental impacts gotten better, stayed the same, or gotten worse in the last 3 years?

Much worse Much better Don't know







Base: all respondents. (n = 1307)

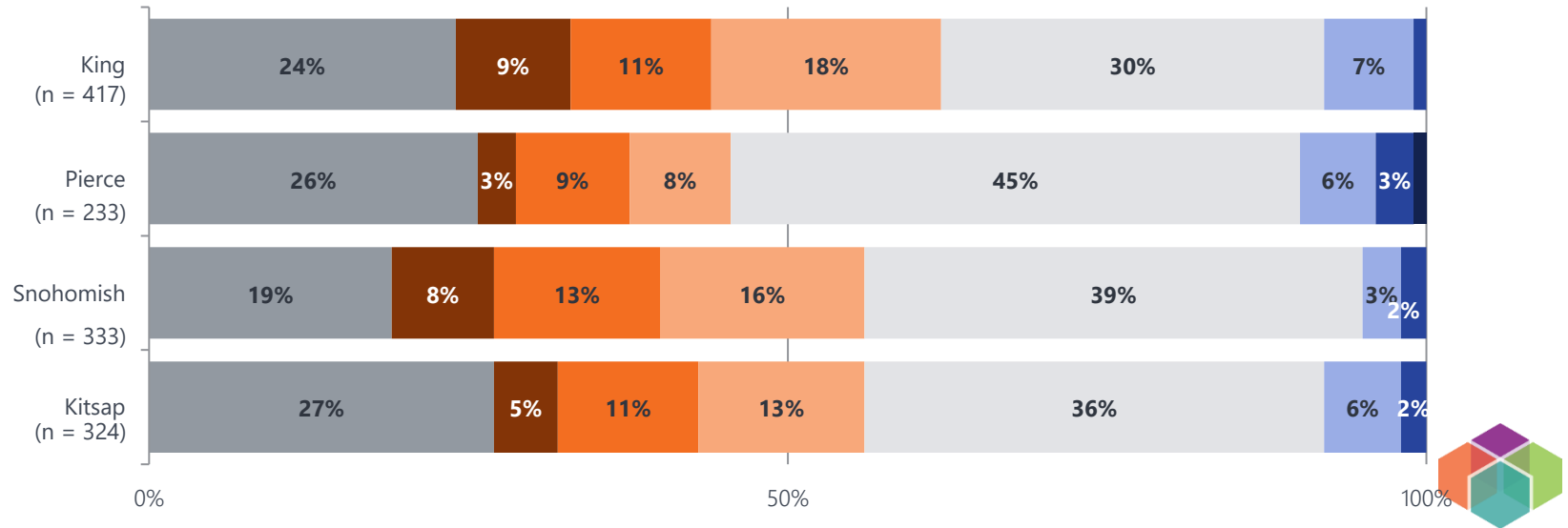


A plurality of respondents think **noise impacts** have stayed the same

Has the noise impacts gotten better, stayed the same, or gotten worse in the last 3 years?

Base: all respondents. (n = 1307)

Much worse      Much better  Don't know

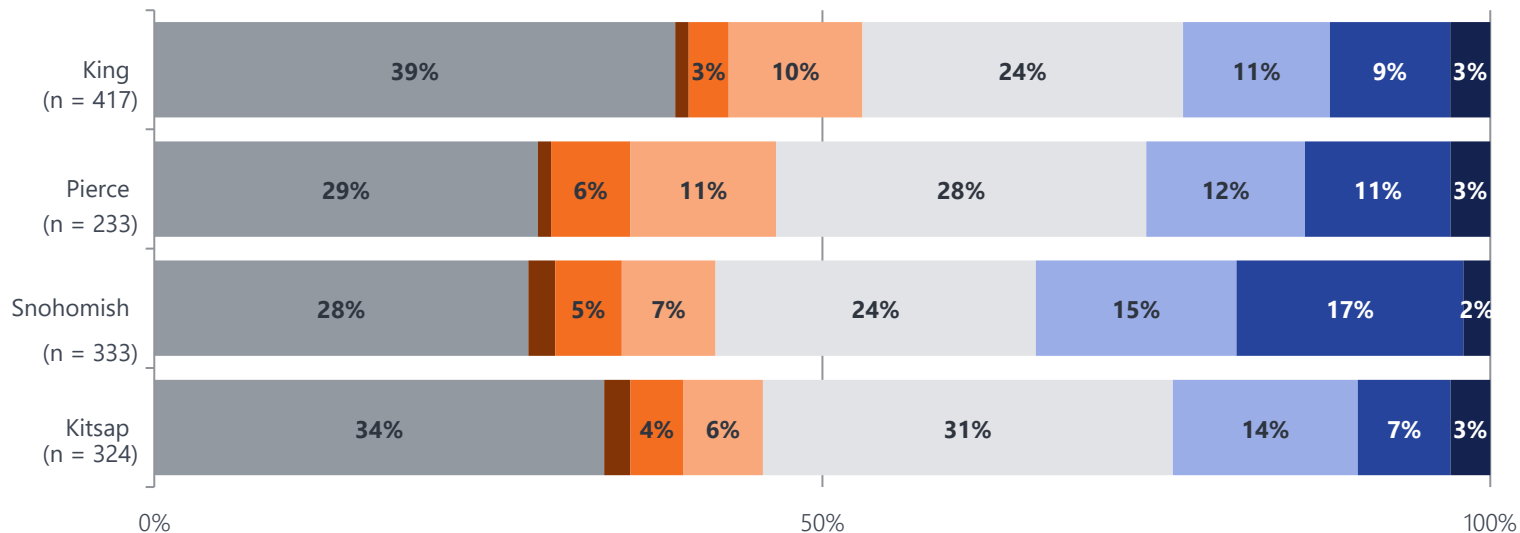


Respondents think **economic benefits** have stayed the same (24-31%), or don't know of the changes (28-39%)

Has economic benefits gotten better, stayed the same, or gotten worse in the last 3 years?

Base: all respondents. (n = 1307)

Much worse ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ Much better ■ Don't know ■



Differences Between Perceived Importance and Perceptions of Worse/Same/Better



Across the four-county region, the issues where the public most sees importance as high but performance as low are **cost of flying, getting through security lines, and access to airports**

King

1. Environmental impacts
2. Getting through security lines
3. Access to airports & Cost of flying (tied between the two features)

Pierce

1. Cost of flying
2. Access to airports
3. Getting through security lines

Snohomish

1. Cost of flying
2. Getting through security lines
3. Access to airports

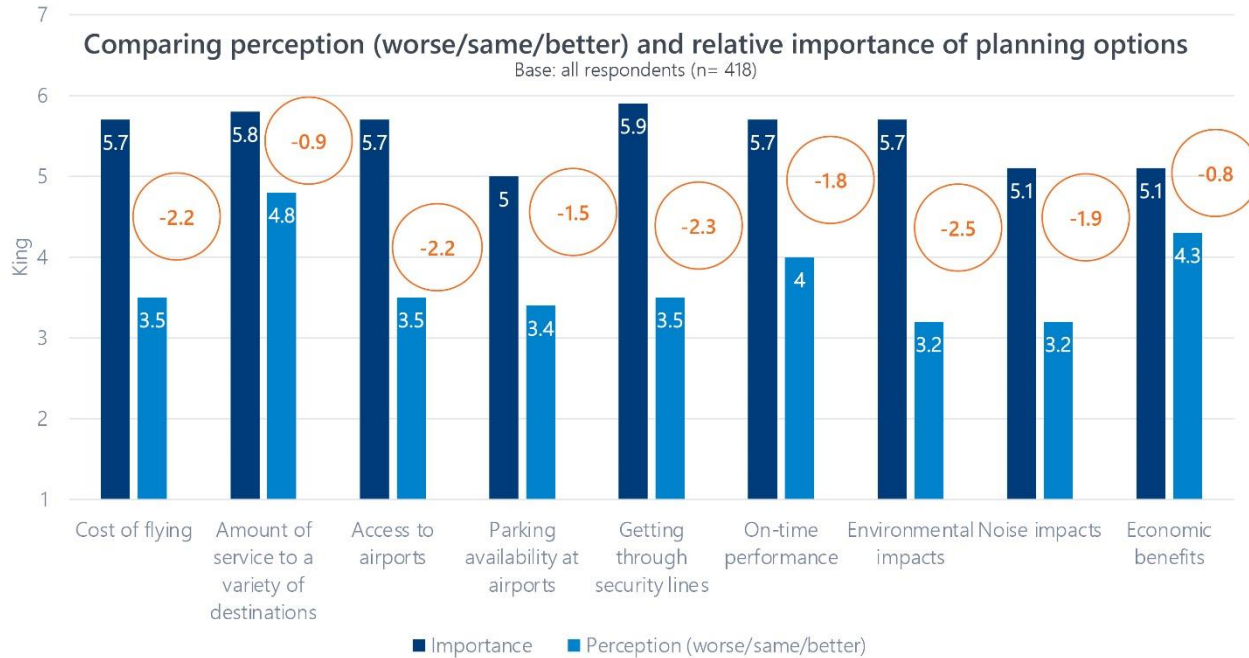
Kitsap

1. Cost of flying
2. Access to airports
3. Getting through security lines

We selected the top-ranking features based the difference between perceived importance and perception (worse/same/better). The differences within the top-ranking features are small (between 0.1-0.5).



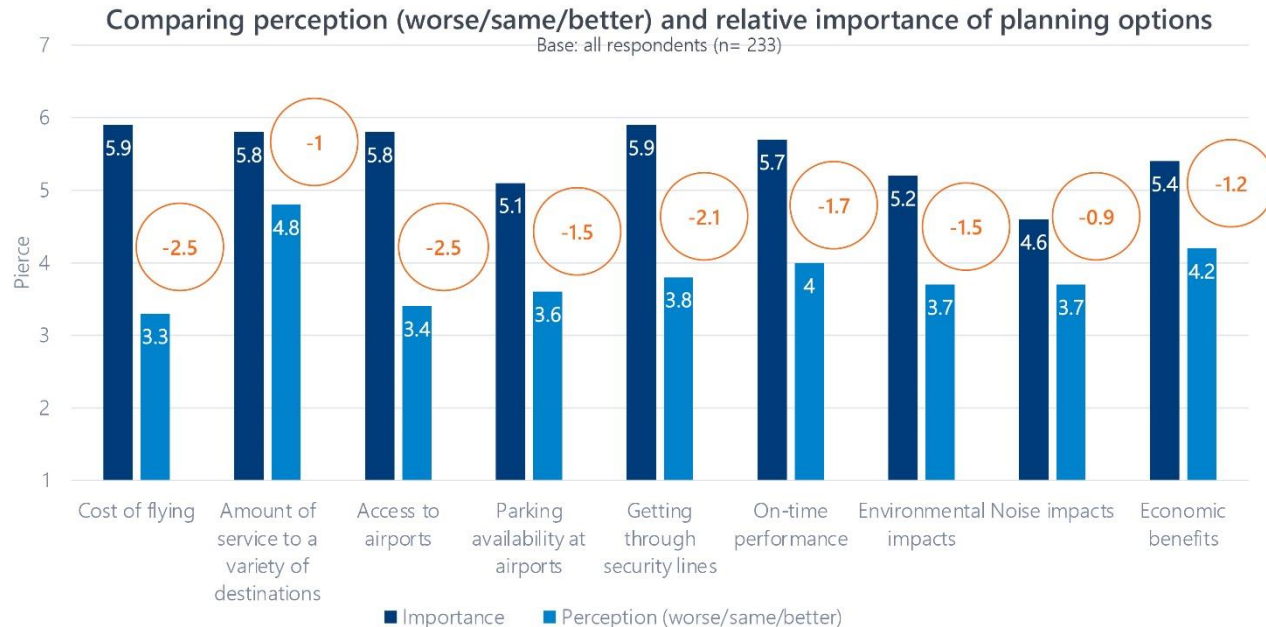
Among King County residents, the greatest differences between importance and perceived performance are related to **environmental impacts** and **getting through security lines**



The reported differences between perception and importance are statistically significant



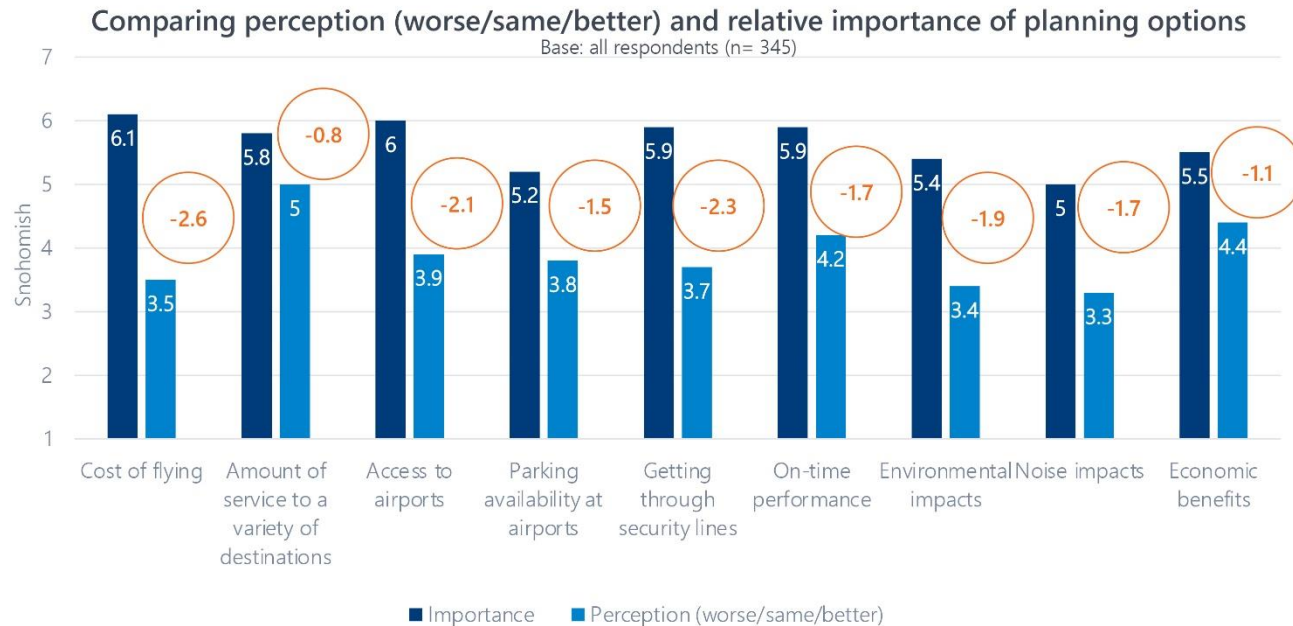
Among Pierce County residents, the greatest differences between importance and perceived performance are related to **cost of flying** and **access to airports**



The reported differences between perception and importance are statistically significant



Among Snohomish County residents, the greatest differences between importance and perceived performance are related to **cost of flying** and **getting through security lines**



The reported differences between perception and importance are statistically significant



Among Kitsap County residents, the greatest differences between importance and perceived performance are related to **cost of flying** and **access to airports**

Comparing perception (worse/same/better) and relative importance of planning options.

Base: all respondents (n= 324)



The reported differences between perception and importance are statistically significant



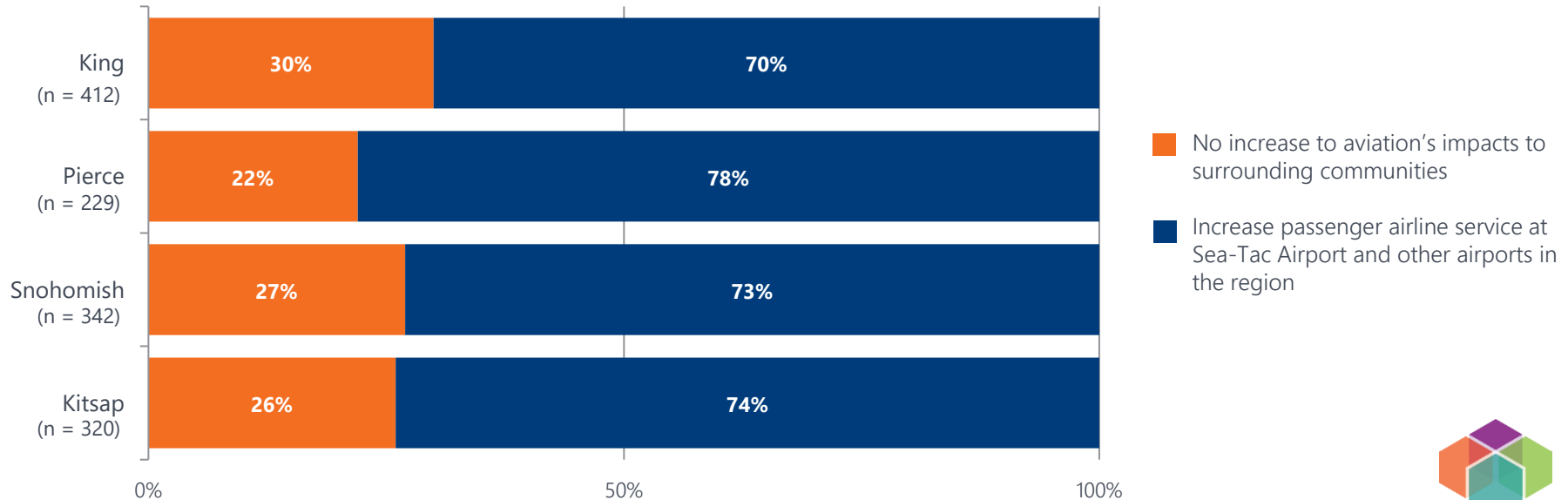
Trade-Off Aviation Questions



Increasing passenger airline service is more important to people than no increase to aviation impacts

Which is more important to you?

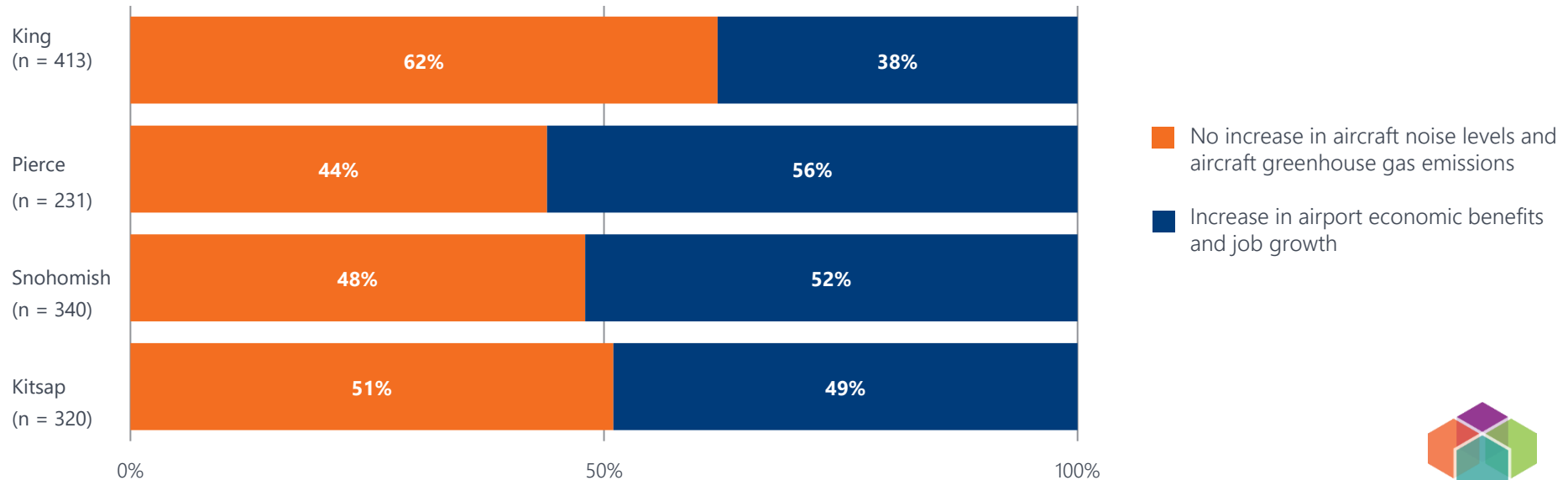
Base: all respondents. (n = 1303)



The region is split between aircraft noise/greenhouse gas emissions and increasing economic benefits—except in King County

Which is more important to you?

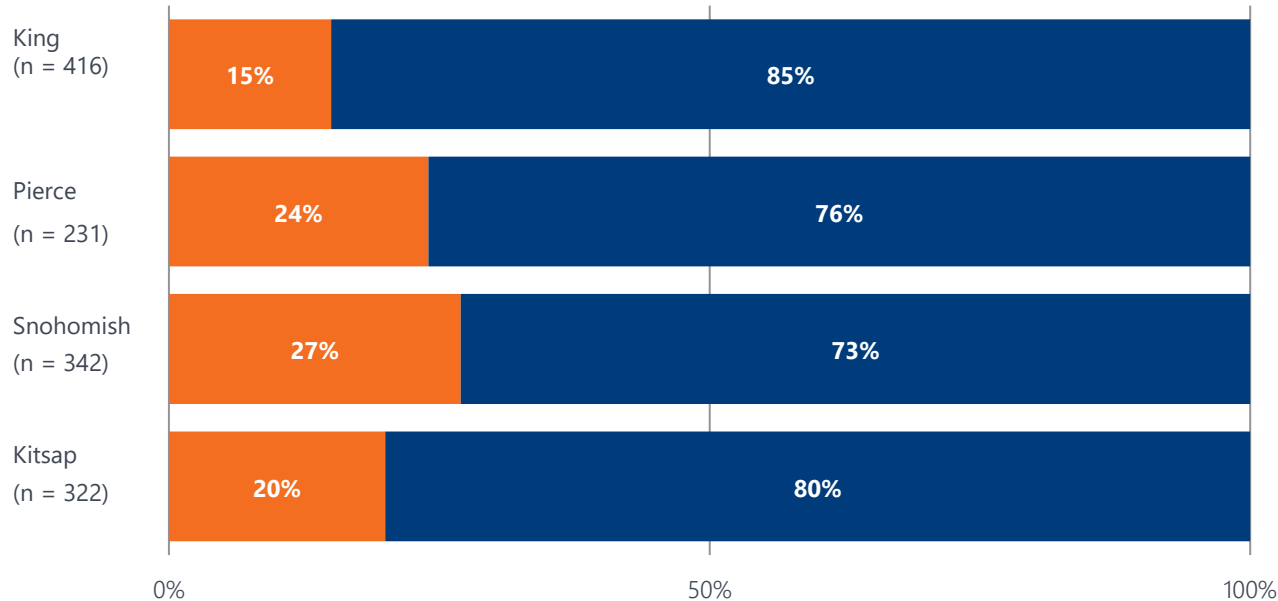
Base: all respondents. (n = 1304)



73-85% of respondents think it is more important to **improve transportation options** to airports than **increase parking capacity**

Which is more important to you?

Base: all respondents. (n = 1311)



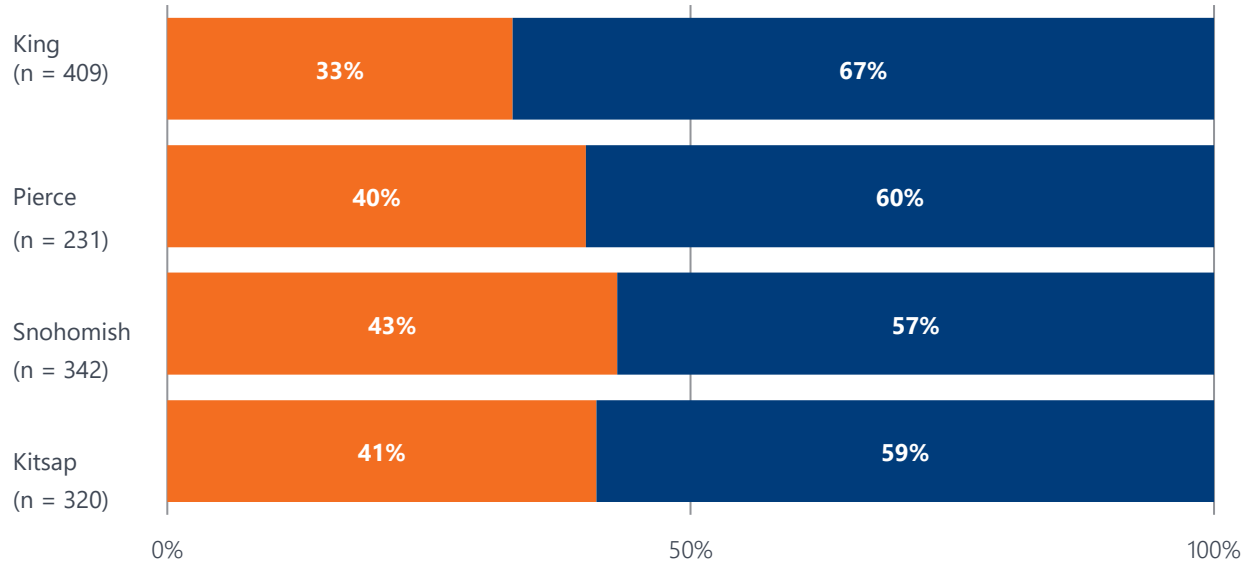
- Increase parking capacity at airports
- Improve transportation options to airports



57%–67% of respondents think it is more important to accommodate passenger service at **existing airports** than at a **brand-new airport**

Which is more important to you?

Base: all respondents. (n = 1302)



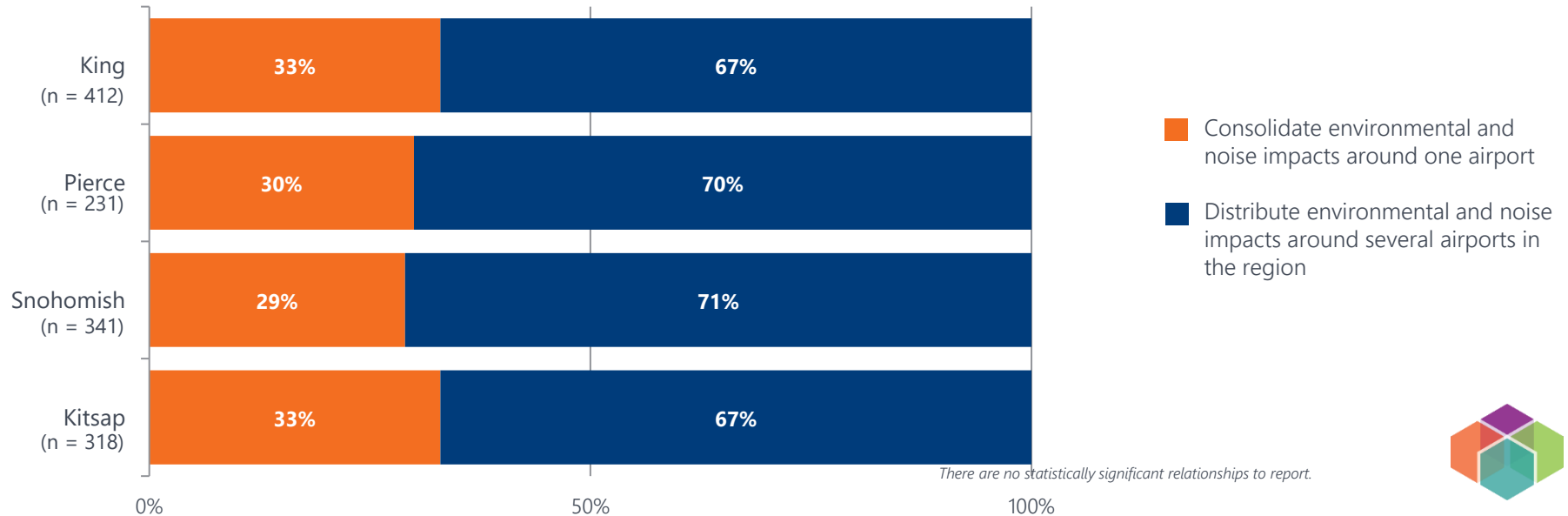
- Accommodate additional passenger service at a brand-new airport in the region
- Accommodate additional passenger service at existing airports in the region



In all four counties, **distributing environmental and noise impacts** around several airports is more important than **consolidating impacts** around one airport

Which is more important to you?

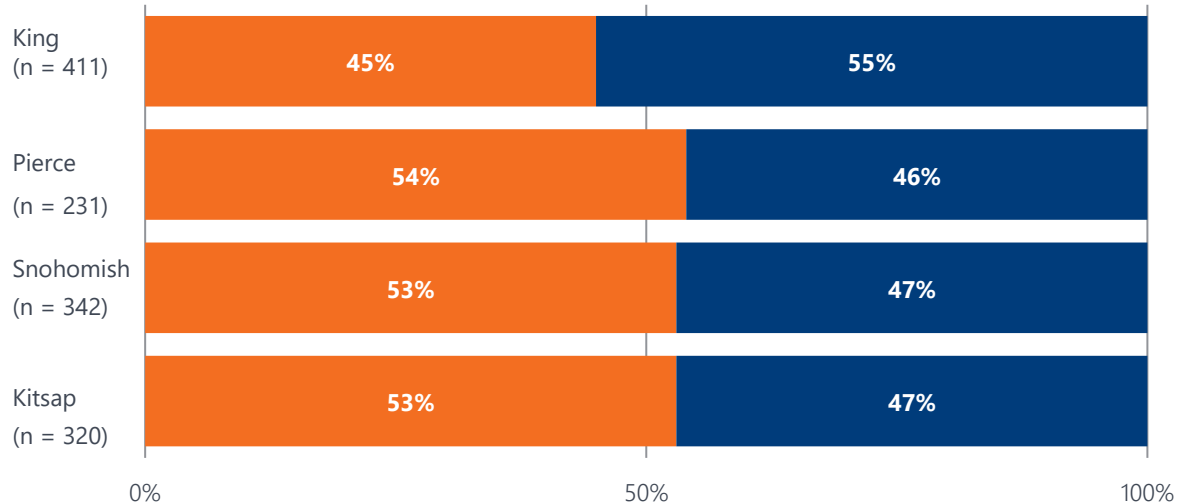
Base: all respondents. (n = 1302)





Respondents are divided on expanding passenger service capacity in the aviation system or investing in a high-speed rail as an alternative to flying

Which is more important to you?

Base: all respondents. (n = 1304)



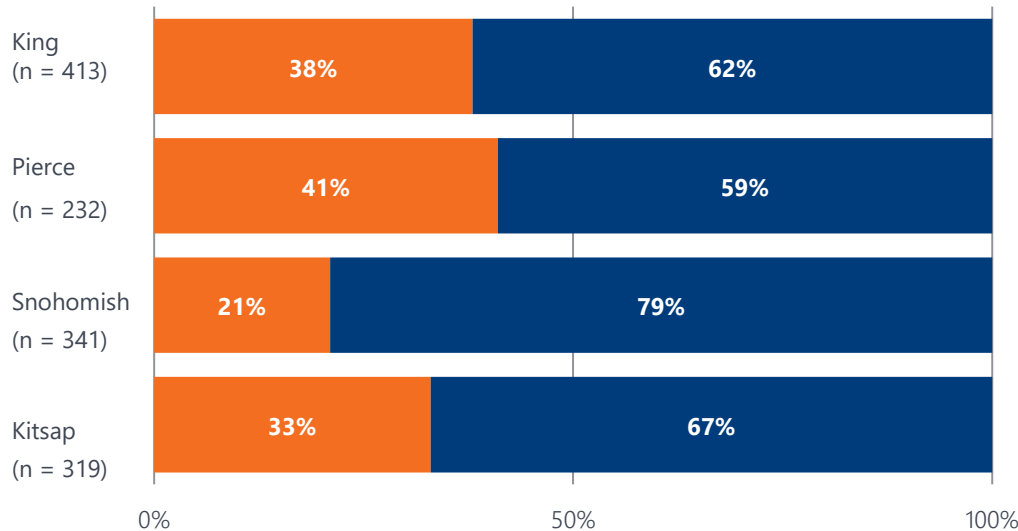
-  Increase passenger service capacity Sea-Tac airport and other airports in the region
-  Invest in high speed rail to provide an alternative to flying



Increasing passenger service capacity at **other regional airports** is more important to people than increasing capacity at **Sea-Tac** – Snohomish respondents are most enthusiastic about increasing capacity at regional airports.

Which is more important to you?

Base: all respondents. (n = 1305)



- Increase passenger service capacity at Sea-Tac
- Increase passenger service capacity at other regional airports



Thank you.

