



**Land Use & Economic  
Development  
Committee Agenda**  
Mukilteo City Hall - 11930 Cyrus  
Way  
**Tuesday, December 1, 2020**

**4:00 PM-5:30 PM**

**Zoom Virtual Meeting**

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**Join Zoom Meeting**

<https://us02web.zoom.us/j/85386801561?pwd=TGI2cTg1WHd5MGk5Ky9yWGd3bohaQT09&from=msft>

**By Phone:**

+1 253 215 8782 US (Tacoma)  
+1 669 900 9128 US (San Jose)

Meeting ID: 853 8680 1561  
Passcode: 307662

**CALL TO ORDER - 4:00 PM**

**Meeting Objectives:**

1. Paine Field - Commercial Aviation  
County Councilmember Megan Dunn (District 2)  
County Councilmember Stephanie Wright (District 3)
2. Economic Recovery

**ADJOURNMENT - 5:30 PM**

**Next Meeting:** Tuesday, January 5, 2021 from 4:00 PM - 5:30 PM (Virtual/Remote)

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LAND USE & ECONOMIC DEVELOPMENT COMMITTEE AGENDA REPORT	
<b>SUBJECT TITLE:</b> Paine Field/Commercial Aviation - County Councilmembers Dunn and Wright	<b>FOR AGENDA OF:</b> December 1, 2020
<b>Contact Staff:</b> David Osaki, Community Development Director	<b>EXHIBITS:</b> <ol style="list-style-type: none"> <li>1. Commercial Aviation Coordinating Commission (“CACC”) Membership (Voting and Non-Voting members)</li> <li>2. October 21, 2020 CACC Meeting PowerPoint (<i>excerpts</i>)</li> <li>3. PSRC Baseline Aviation Survey Report</li> </ol>
<b>Department Director:</b> David Osaki	

## **SUMMARY**

At its October 6, 2020 meeting, the Land Use & Economic Development Committee (LU&ED) discussed work of the Washington State Department of Transportation (“WSDOT”) Aviation Division’s Commercial Aviation Coordinating Commission (“CACC”).

The CACC is to make a recommendation to the State legislature by January 1, 2022 on a single preferred location for a primary aviation airport that would be completed and functional by 2040 (*however, see discussion further below on CACC timeline*). The January 1, 2022 deadline is preceded by two other deadlines (January 1, 2021 and September 1, 2021) that are intended to narrow the list of potential sites.

During its October 6, 2020 discussion, the LU&ED Committee consensus was that the Mayor reach out to Snohomish County Councilmembers Dunn and Wright on their availability to attend a LU&ED Committee meeting to discuss the future of aviation in Snohomish County.

## **BACKGROUND**

The Commercial Aviation Coordinating Commission (“CACC”) was created by the Washington State Legislature in 2019 (SSB 5370) due to concerns that Sea-Tac International Airport is nearing capacity limits.

The CACC consists of 15 voting members and 12 non-voting members (although the Governor may appoint additional non-voting members) and includes representatives from the aviation industry, airport communities, freight industry, state and local agencies and elected officials (***See Exhibit 1***). Arif Ghouse, Director of Paine Field/Snohomish County Airport, is a CACC voting member. The WSDOT Aviation Division provides the CACC with technical assistance and staff support. Power

Based on the State legislation, the CACC adopted a three-phase methodology as follows:

- **Phase 1** - By January 1, 2021, the CACC is to develop a short list of six (6) potential airport alternatives to present to the legislature.

- **Phase 2** - By September 1, 2021, the CACC will identify the top two (2) airport locations.
- **Phase 3** - By January 1, 2022, the CACC is required to choose, by a 60 percent majority vote, a single preferred location. (The CACC may also make recommendations on improvements to other locations.)

The CACC's most recent meeting was October 21, 2020. Among the preliminary recommendations discussed at that meeting included:

- The CACC will recommend to the 2021 legislature (House and Senate Transportation Committees) an initial "soft" list of six (6) possible sites. The list is subject to change and includes: Arlington, Bremerton, Everett/Paine Field, Shelton/Sanderson Field, Tacoma Narrows, Toledo (Additional input regarding Olympia (currently lacks sponsor support) was mentioned).
- Supporting legislation to adjust the CACC's timeline for a single site recommendation from January 1, 2022 to 2024. This allows more time for public involvement, to gather additional technical information for the CACC's use, and for the CACC to explore adding air cargo capacity at Boeing Field. (Currently, King County is to be excluded from any CACC recommendations.)

**Exhibit 2** is a PowerPoint presentation excerpt from the CACC's October 21, 2020 meeting. The excerpt focuses on CACC recommendations being developed to date, including requesting a time extension.

### **Puget Sound Regional Council - Regional Aviation Baseline Study**

Separate from the CACC's work, the Puget Sound Regional Council ("PSRC") has been leading a Federal Aviation Administration ("FAA") funded "Baseline Study". The scope of this Baseline Study is the four-county region of King, Pierce, Snohomish, and Kitsap counties.

The goal of the Baseline Study is to provide a common understanding of the current status and projected demand for aviation in the region and set the stage for future planning efforts. This Baseline Study will not recommend specific solutions to addressing demand.

In developing this Baseline Study, the PSRC has done public outreach. **Exhibit 3** is a PSRC PowerPoint summarizing results of a recent Aviation Baseline Study survey. Several questions break responses down by the four counties.

### **RECOMMENDED ACTION**

LU&ED Committee discussion of aviation in Snohomish County with County Councilmembers Dunn and Wright.

# EXHIBIT 1

## Commercial Aviation Coordinating Commission

### Voting Members

	Position	Name
1.	Representative of commercial service airports and ports – County with a population of two million or more	<b>Jeffrey Brown</b>
2.	Representative of commercial service airports and ports – Port in eastern WA with a runway of at least 13,500' in length	<b>Stroud Kunkle</b>
3.	Representative of commercial service airports and ports – Commercial service airport in eastern WA located in a county with a population of 400,000 or more	<b>Larry Krauter</b>
4.	Representative of commercial service airports and ports – Association of ports	<b>Jim Kuntz</b>
5.	Representative from the airline industry and private sector	<b>Shane Jones</b>
6.	Representative from the airline industry and private sector	Open
7.	Representative from the airline industry and private sector	<b>Andrea Goodpasture</b>
8.	Citizen representative from eastern Washington	<b>Mark Englizian</b>
9.	Citizen representative from western Washington	<b>Steve Edmiston</b>
10.	Representative from the freight forwarding industry	<b>Spencer Hansen</b>
11.	Representative from the trucking industry	<b>Joseph Braham</b>
12.	Representative from a community organization which understands the impacts of a large commercial aviation facility on a community	<b>Arif Ghouse</b>
13.	Representative from a statewide environmental organization	<b>Bryce Yadon</b>
14.	Representative from the Department of Commerce	<b>Robin Toth</b>
15.	Representative from the Division of Aeronautics (Aviation), Dept. of Transp.	<b>David Fleckenstein</b>

## Commercial Aviation Coordinating Commission

### Non-Voting members

	Position	Name
1.	Representative from the WA state Aviation Alliance (WSAA)	<b>Warren Hendrickson</b>
2.	Representative from the Department of Defense	<b>Robert Rodriguez</b>
3.	Senate member from the two largest caucuses in the Senate, appointed by the President of the Senate	<b>Senator Jim Honeyford</b>
4.	Senate member from the two largest caucuses in the Senate, appointed by the President of the Senate	<b>Senator Karen Keiser</b>
5.	House of Representatives member from the two largest caucuses, appointed by the Speaker of the House	<b>Representative Tom Dent</b>
6.	House of Representatives member from the two largest caucuses, appointed by the Speaker of the House	<b>Representative Tina Orwall</b>
7.	Representative from the Division of Aeronautics of the Dept. of Transportation	<b>Robert Hodgman</b>
8.	Representative from an eastern WA metropolitan planning organization	<b>Sabrina Minshall</b>
9.	Representative from a western WA metropolitan planning organization	<b>Josh Brown</b>
10.	Representative from an eastern WA regional airport	<b>Tony Bean</b>
11.	Representative from a western WA regional airport	<b>Rudy Rudolph</b>
ADDT'L		
12.	Multi-Modal Planning	<b>Kerri Woehler</b>

# Commercial Aviation Coordinating Commission

Online virtual meeting

DAVID FLECKENSTEIN  
Commercial Aviation Coordinating Commission Chair  
October 21, 2020

# Agenda

**Welcome**

**Updates to Staff Work**

**Public Comment Period and Summary of Comments Received**

**Environmental Presentations**

- **FAA Scope and process**
- **What does WSDOT consider at the planning level**
- **WSU Sustainable Aviation Fuel & Noise Mitigation Presentations**

**BREAK**

**Workbook Feedback**

- **Planning Staff's Recommendations**
- **Time Extension Factors**
- **Recommendations to the Legislature in 2021**
- **Feedback on Evaluation Criteria**
- **Feedback on Guiding Principles**

**Commission Member Round Table Discussion**

**Next Steps**

# Updates to Staff Work

- ✓ Informational briefings continued
- ✓ Request for use of on call communicators submitted and approved
- ✓ Workbook #4 provided to commission members
- ✓ Collaboration with engineering firms regarding demand for passenger service, air cargo, and general aviation.
- ✓ Letters from City of Lakewood, City of Tacoma, and Futurewise provided to CACC members
- ✓ List of near-term recommendations
- ✓ Input provided on timeline extension
- ✓ Guest speaker work added to meet member requests for information



# Discussion of Recommendations

Near Term  
Recommendations

Longer Term  
Recommendations

Legislative  
Recommendations

# Planning Staff Near-Term Recommendations

“Recommendations to the legislature on future Washington state long-range commercial aviation facility needs...to meet anticipated commercial aviation, general aviation, and air cargo demands;”

- **Support legislation to adjust the timeline of the CACC from 2022 to 2024.**
  - *Make allowances for the Chair of the CACC to recess the commission while the Aviation System Plan Update gathers additional information for the commission's use.*
  - *Allow the CACC to explore adding air cargo capacity at Boeing Field. (Currently, King County is excluded from any CACC recommendations)*

# Planning Staff Near-Term Recommendations

- Provide the Legislature with a “soft” list of 6 potential sites, that may be subject to change

# Planning Staff Near-Term Recommendations

- Propose phased implementation to meet near-term demand utilizing 2-3 existing airports (most resilient path)

# Planning Staff Near-Term Recommendations

- Support the continuation of the revolving airport loan program and the Community Aviation Revitalization Board

# Planning Staff Long-Term Recommendations

- Recommend furthering the development and use of Sustainable Aviation Fuel

# Planning Staff Long-Term Recommendations

- Continue the efforts of the Electric Aircraft Working Group (EAWG) and WSDOT's overall efforts in emerging aerospace technology

# Planning Staff Near-Term Recommendations (Summary)

- Provide the Legislature with a “soft” list of 6 potential sites, that may be subject to change
- Propose phased implementation to meet **near term** demand utilizing 2-3 existing airports (most resilient path)
- Support legislation to adjust the timeline of the CACC from 2022 to 2024.
  - Make allowances for the Chair of the CACC to recess the commission while the Aviation System Plan Update gathers additional information for the commission’s use.
  - Allow the CACC to explore adding air cargo capacity at Boeing Field. (Currently, King County is excluded from any CACC recommendations)
- Support the continuation of the revolving airport loan program and the Community Aviation Revitalization Board



# Planning Staff Long-Term Recommendations (Summary)

- Recommend furthering the development and use of Sustainable Aviation Fuel
- Continue the efforts of the Electric Aircraft Working Group (EAWG) and WSDOT's overall efforts in emerging aerospace technology

# Time Extension Considerations

- Why?
  - Public engagement is hindered by real constraints as a result of the pandemic
  - Air passenger demand has fallen
  - Air cargo demand has increased
  - Passenger demand is expected to return and surpass 2019 levels
  - Some segments are difficult to predict
  - Additional technical analysis needed to offer informed recommendations

# Technical Analysis Factors

Areas where we have insufficient information and uncertainty may require more in-depth analysis

## Commercial Aviation

- No greenfield site has emerged
- Expansion of **existing** airports to accommodate both passenger and cargo commercial aviation demand likely to require four or more airports
- Passenger and cargo air carriers need to be close to population centers
- Some possible sites unlikely to meet air carrier and passenger/shipper needs

# Technical Analysis Factors

## General Aviation

- GA aircraft storage demand already exceeds supply in several locations
- GA aircraft storage demand projected to increase
- Highest/best use of existing airports has the potential to displace GA in some locations
- Revolving loan fund, a key funding source for hangars, is set to expire

# Technical Analysis Factors

## Environmental Interests

- Jet-A fuel likely to remain for the foreseeable future
- Advancement of Sustainable Aviation Fuel (SAF) requires legislative and industry support
- Noise mitigation strategies need further development and implementation strategy
- Electric and alternate propulsion aviation sector still emerging/evolving

# Technical Analysis Factors

## Other Factors

- High-speed rail potential to connect to airports
- Increased airspace congestion possible, requiring concepts and strategies
- Increased road congestion likely with current infrastructure, requiring strategies and budget estimates

# How we will use the extra time

- Additional time will allow better engagement with the public post-pandemic
- The planning team will continue to work to identify a possible greenfield site
- A portion of the Aviation System Plan Update may include a team of consultants with the technical expertise to address these topics:
  - Passenger air service estimates and operations factors
  - Air Cargo operations factors
  - General Aviation storage development parameters
  - Road analysis, conceptual project development and rough cost estimates
  - Airspace capacity analysis and possible routing solutions
  - Airport improvement project concept development and rough costing
  - Sustainable aviation fuel advancement strategies
  - Electric and alternate propulsion airport infrastructure project development

# Time Extension

## Comments from Legislators



# Recommendations to the Legislature in 2021

- **Initial list of six possible sites** — a soft list: subject to change
  - Arlington, Bremerton, Everett/Paine Field, Shelton/Sanderson Field, Tacoma Narrows, Toledo
  - Additional input regarding:
    - ❖ Olympia (currently lacks sponsor support)
- **Propose phased implementation to meet near-term demand utilizing 2-3 existing airports (most resilient path)**
- **Support extension of the CACC timeline from 2022 to NLT 2024**
- **Fund and solidify the airport revolving loan program (CARB)**

# Round Table Discussion

# Evaluation Criteria

## Commission Member Input

- Most evaluation criteria received Commission Member support of 78% and above
- Summary of comments Commission Members provided:
  - “Balance the limitations of mitigation and issues that can't be mitigated properly”
  - “Focus on ‘fatal flaw’ environmental factors and not try to accomplish project-level assessment or mitigation”
  - “Consider available land to add a runway rather than an existing 2<sup>nd</sup> runway”
  - “Consider land acquisition and land use factors”
  - “Consider infrastructure availability and cost”
  - “Consider combining measures that address adding capacity”

# Feedback on Guiding Principles

- Commission members provided input on elements of guiding principles
- Commission Members indicated general support for proposed guiding principle elements
- Some elements of the principles received strong support:
  - Noise, light, water, soil, air, vibration
  - Aircraft/airport noise mitigation possibilities
  - Federal budget parameters
  - State budget parameters
  - Enhanced mobility of people
  - Congestion mitigation
  - Enhanced trade and economic development
  - More efficient energy use

# Guiding Principle Presentations

- The planning team suggested possible informational presentations on guiding principles to provide Commission Members with up-to-date information on the topics
- Commission Members generally supported the proposed list of topics
- Commission Members provided a few recommendations on additional informative presentations.
- The planning team will develop a schedule of topics and speakers for the Commission
- Some presentations could take place as a live and recorded webinar, separate from regular Commission meetings

# Next Steps

- Through a written report, provide the “soft” list of initial six (6) sites to the House and Senate Transportation Committees along with the near-term recommendations for the aviation system
- Begin work with the FAA to develop an agreed upon scope of work for the 2022 Washington Aviation System Plan Update
- Establish a contract through WSDOT’s pre-approved list of on-call communicators to enhance public outreach
- Continue to develop methods and presentations to ensure ample consideration of the guiding principles in making recommendations
- Plan for a February CACC meeting

For additional information regarding the  
Commercial Aviation Coordinating Commission,  
please visit:

[www.wsdot.wa.gov/aviation/commission/home.htm](http://www.wsdot.wa.gov/aviation/commission/home.htm)

## 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?**

On-time, easy-to-access passenger service (11) 35%

Maximizing economic benefits of the aviation industry (4) 13%

Minimizing noise and environmental impacts of aviation (16) 52%

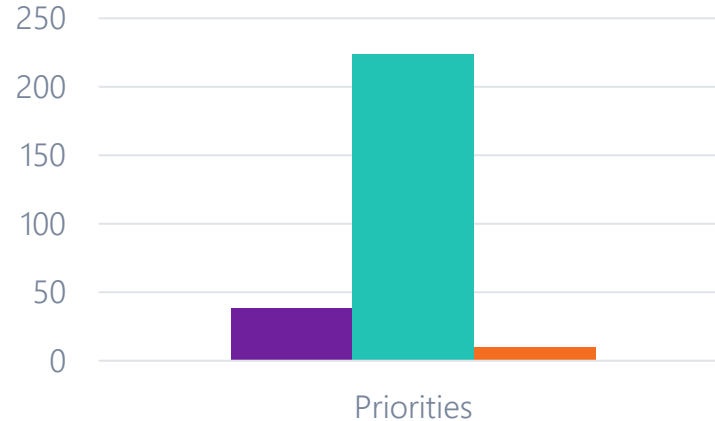
Results from one of the poll questions during the September 23 virtual public meeting.



# 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**

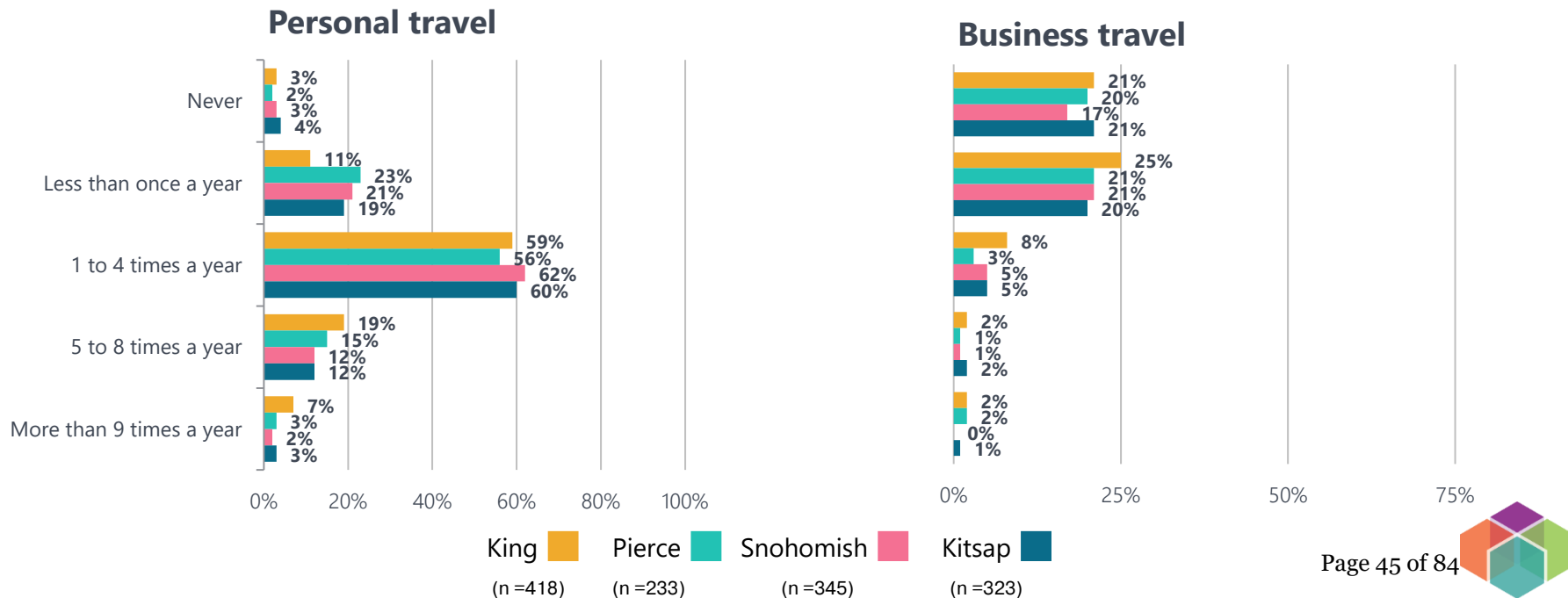
# Flying Behavior and Attitudes Toward Aviation Services



# Respondents use airports more for personal travel than business

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

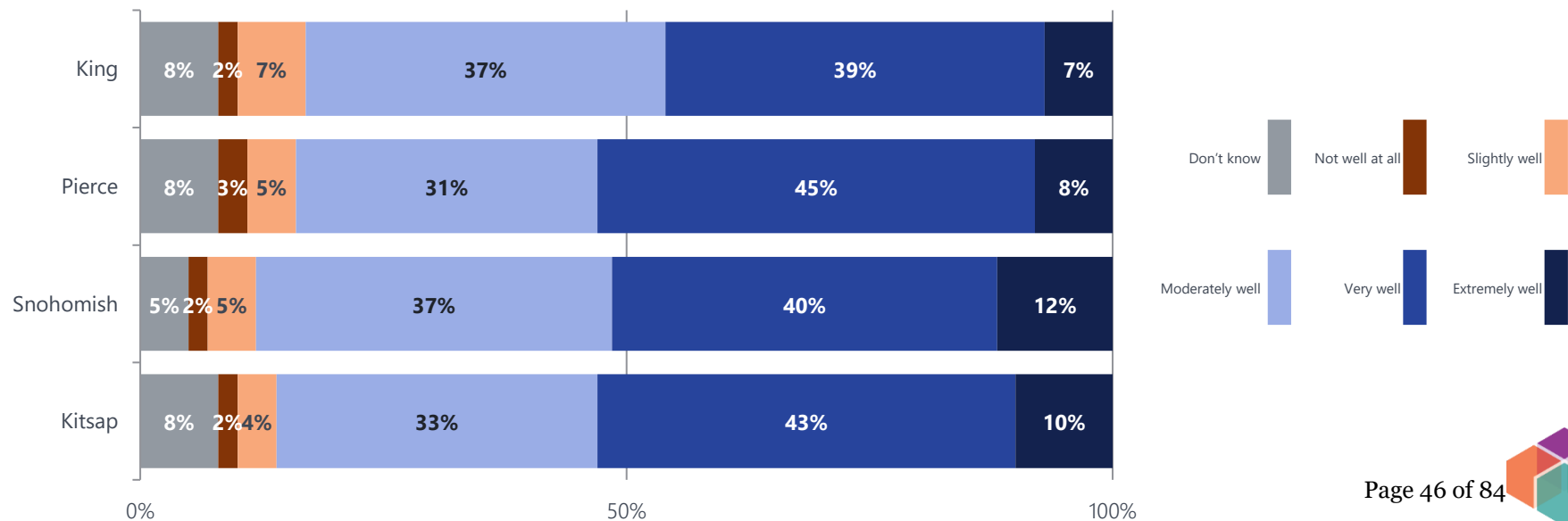
Base: all respondents.



# 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?

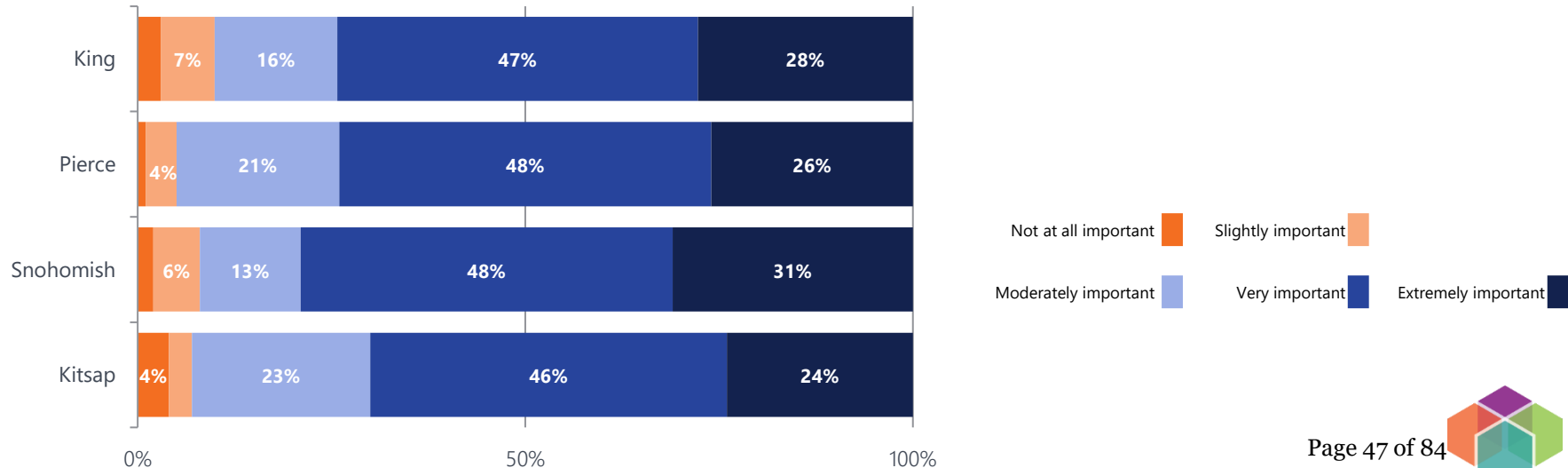
Base: all respondents (n = 1316)



# 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"><li>1. Getting through security lines</li><li>2. On-time performance</li><li>3. Cost of flying</li><li>4. Amount of service to a variety of destinations</li><li>5. Access to airports</li></ol>	<ol style="list-style-type: none"><li>1. Cost of flying</li><li>2. Getting through security lines</li><li>3. Access to airports</li><li>4. Amount of service to a variety of destinations</li><li>5. On-time performance</li></ol>	<ol style="list-style-type: none"><li>1. Cost of flying</li><li>2. Access to airports</li><li>3. Getting through security lines</li><li>4. On-time performance</li><li>5. Economic benefits</li></ol>	<ol style="list-style-type: none"><li>1. Cost of flying</li><li>2. Access to airports</li><li>3. Getting through security lines</li><li>4. On-time performance</li><li>5. Amount of service to a variety of destinations</li></ol>

- 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.

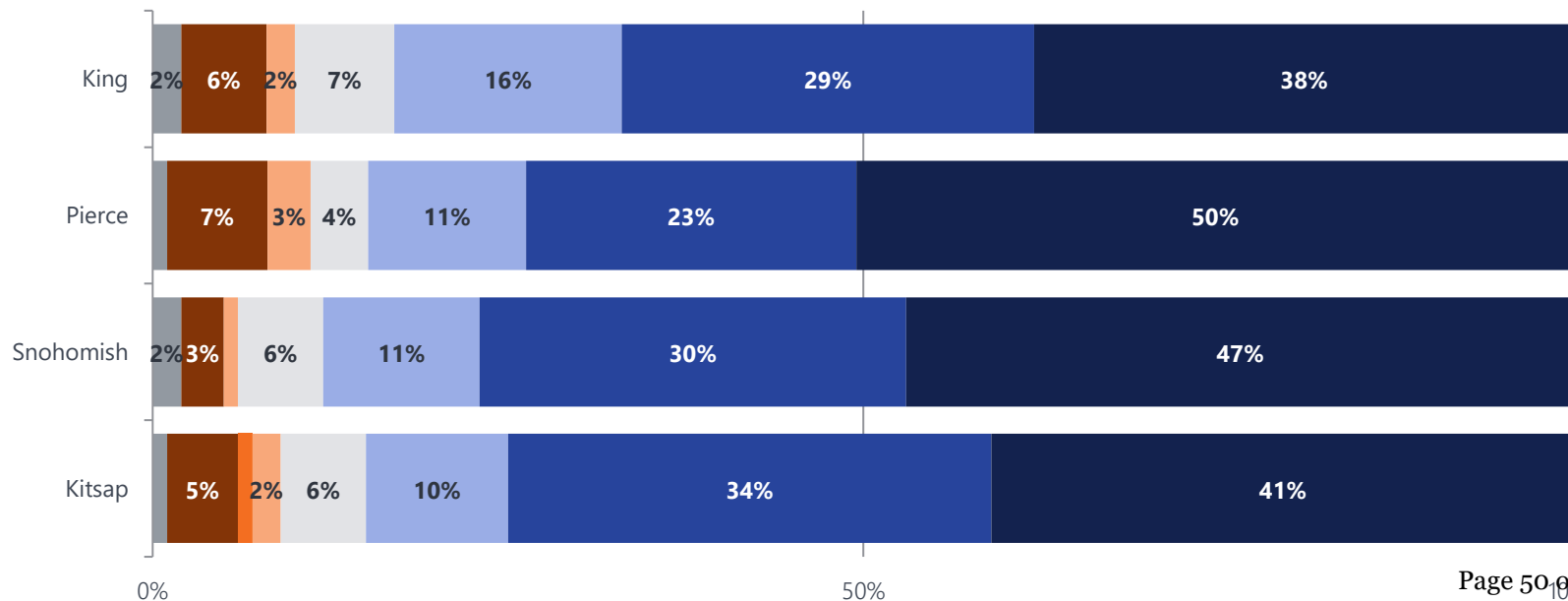


# The **cost of flying** is important to people in all four counties (38-50% said it was very important)

## How important to you is cost of flying?

Base: all respondents. (n = 1286)

Very unimportant Very important Don't know

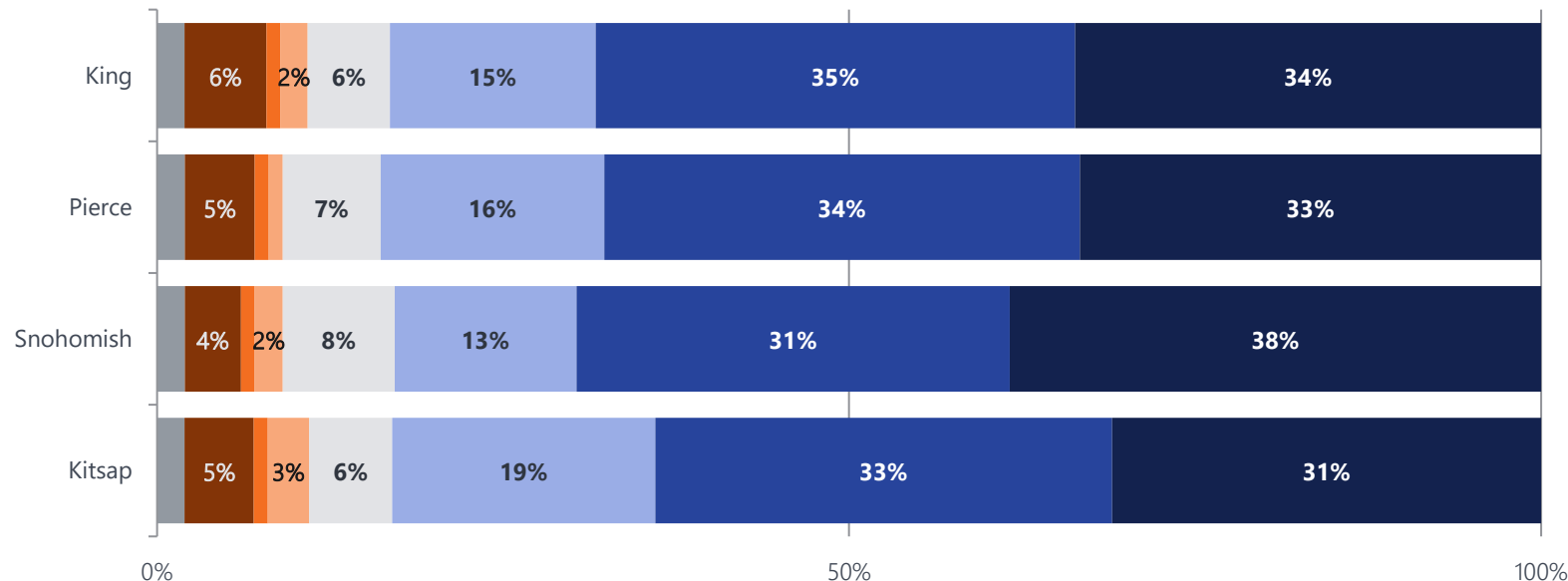


# The amount of service to a variety of destinations is important to people in all four counties (31%-38% said it was very important)

## 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

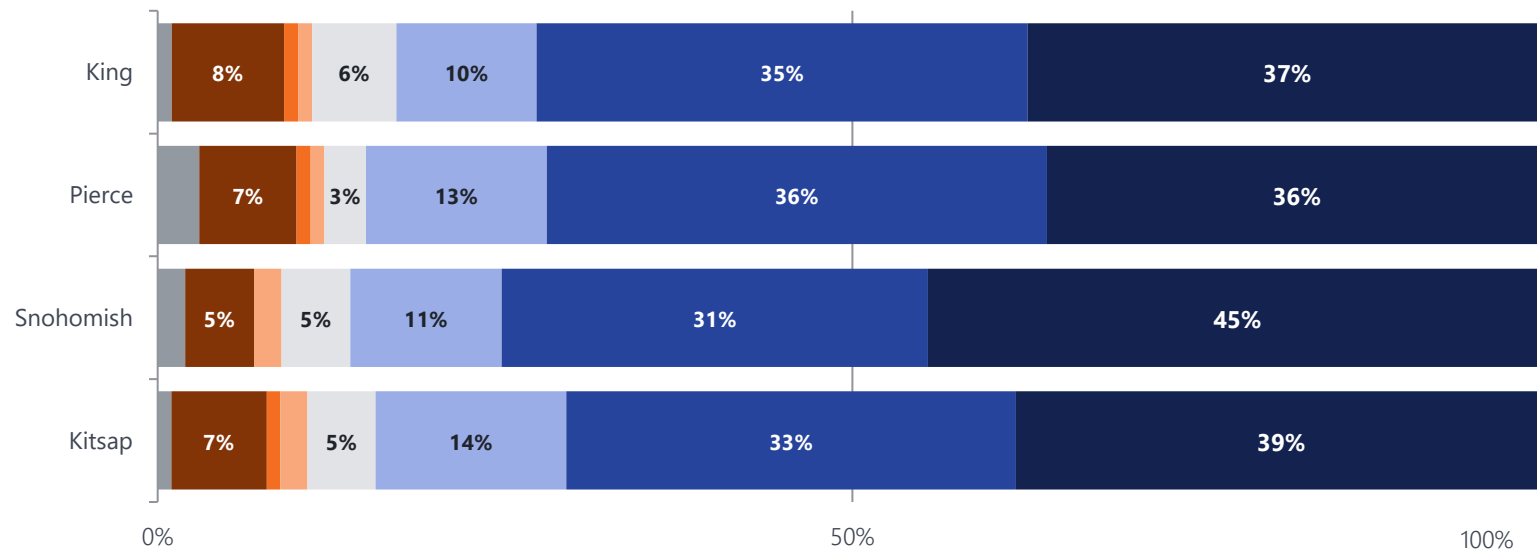


# Access to the airport is important to people in all four counties (36%-45% said it was very important)

## How important to you is access to airports?

Base: all respondents. (n = 1288)

Very unimportant    Very important    Don't know

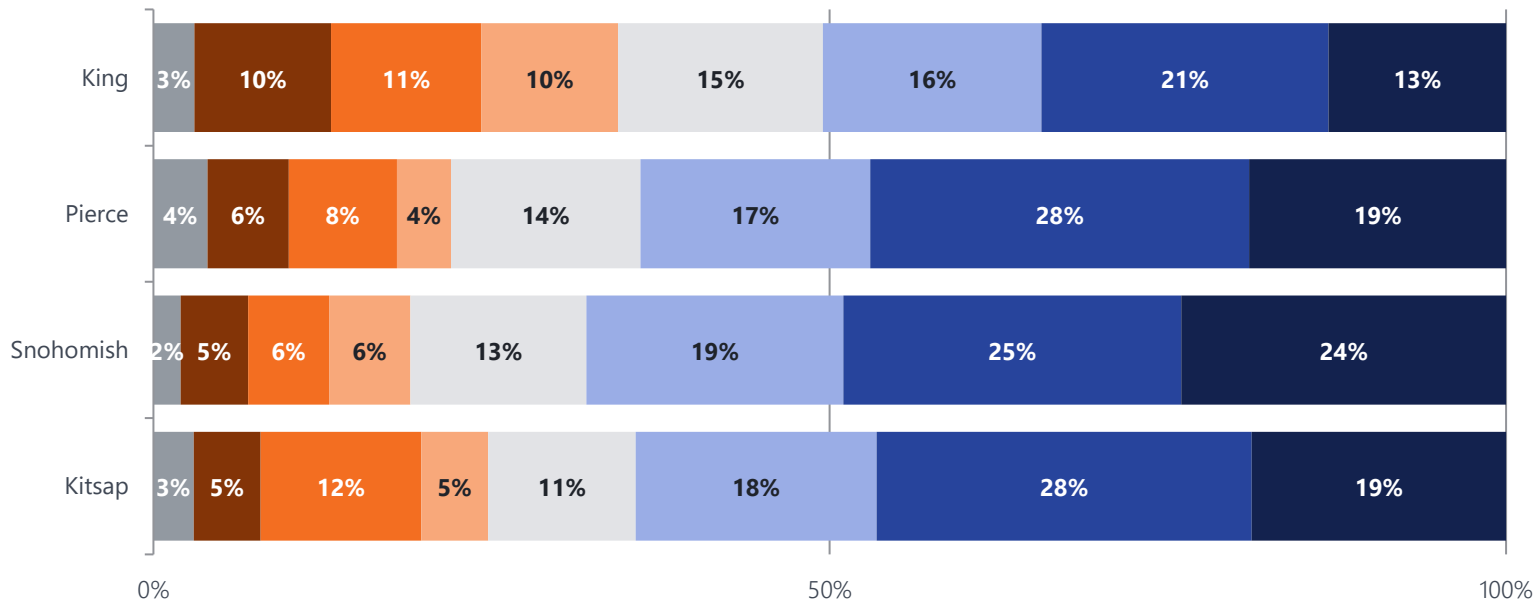


# Parking availability is important to people but less important than the first three features (King County residents perceived as slightly less important)

## How important to you is parking availability?

Base: all respondents. (n = 1298)

Very unimportant    Very important    Don't know

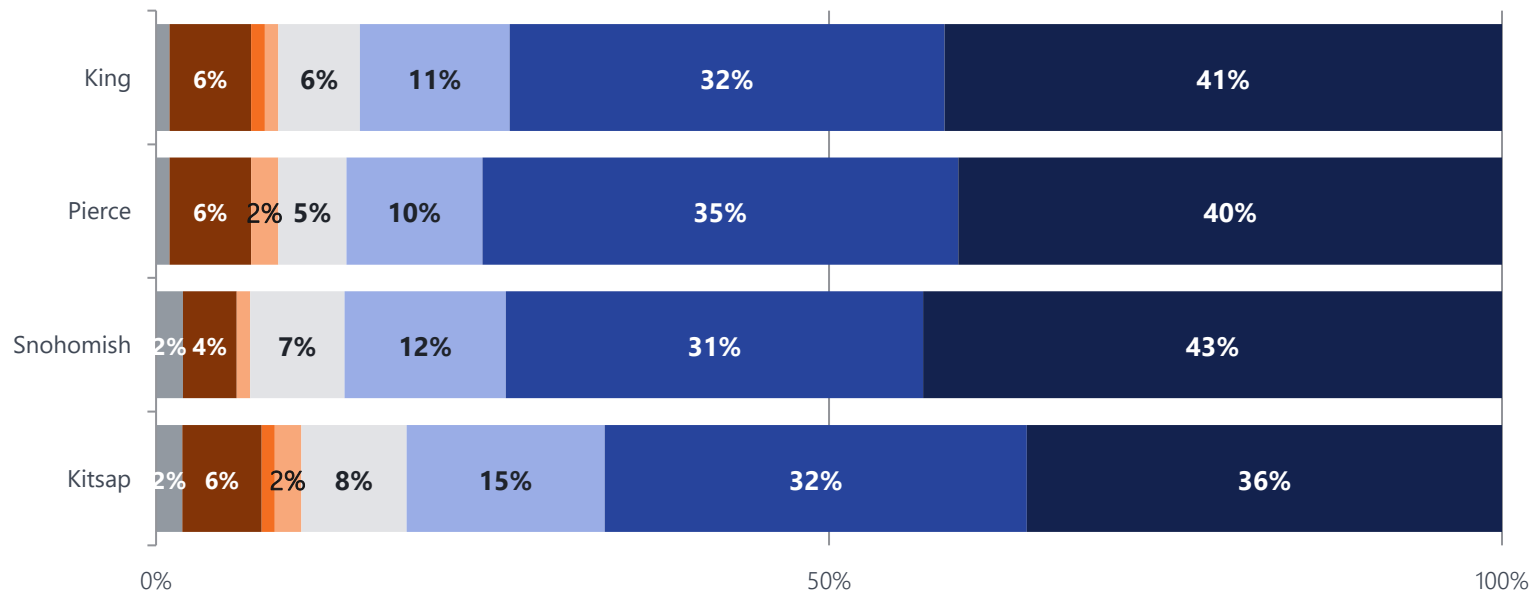


# Getting through the security is important to respondents in all four counties (36%-43% said it was very important)

How important to you is getting through security?

Base: all respondents. (n = 1291)

Very unimportant Very important Don't know

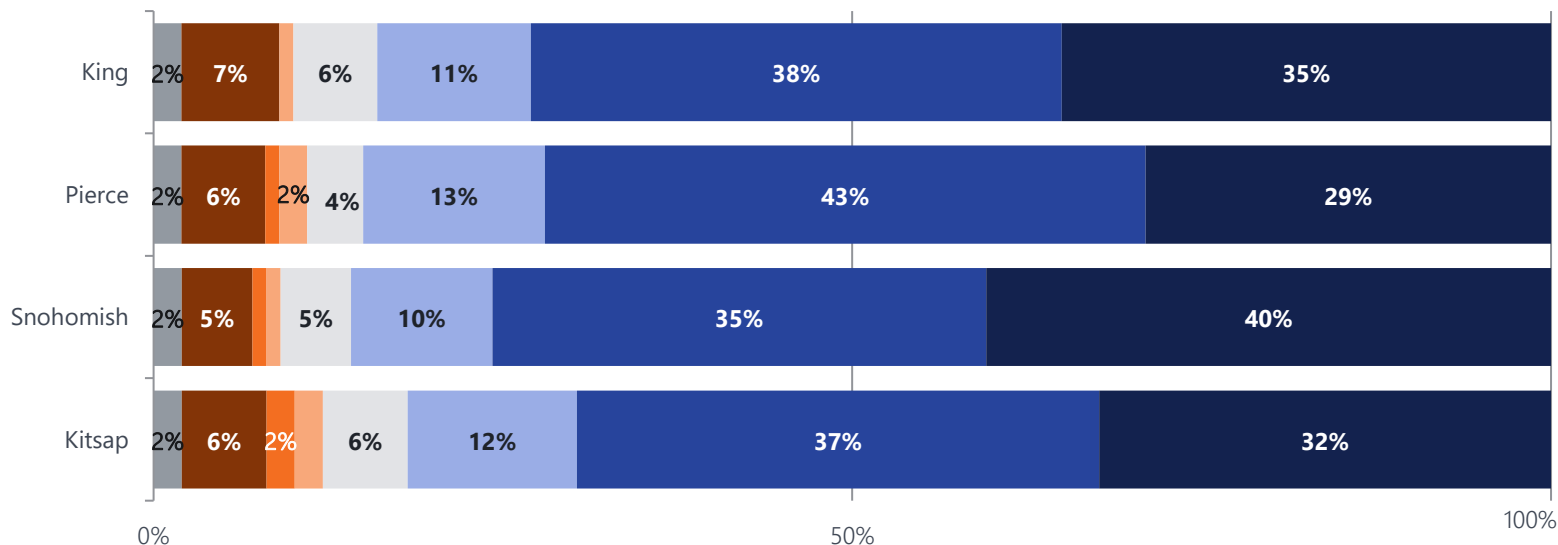


# On-time performance is important to people in all four counties (29%-40% said it was very important)

## How important to you is on-time performance?

Base: all respondents. (n = 1287)

Very unimportant    Very important    Don't know

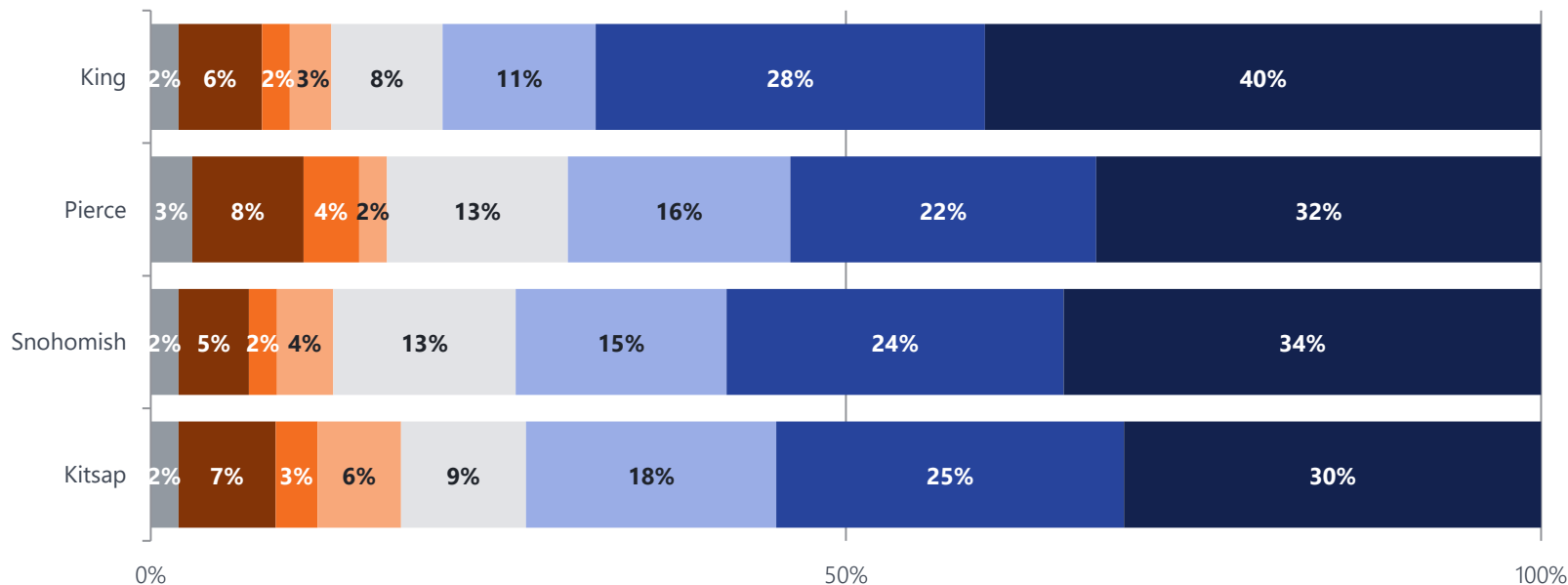


# Environment impacts are important to survey respondents (30%-40% said it was very important)

How important to you are environmental impacts?

Base: all respondents. (n = 1288)

Very unimportant Very important Don't know



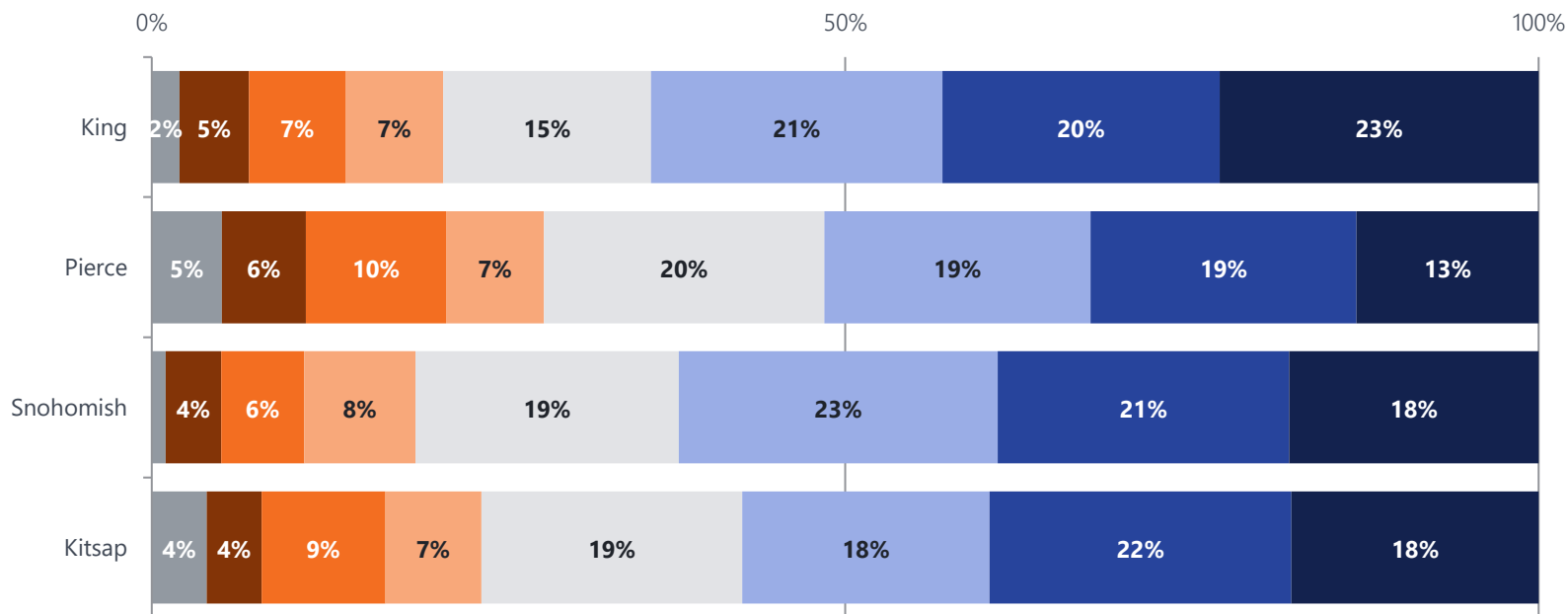


# Noise impacts are important to respondents but much less so than other aspects, with Pierce County residents ranking it the least important

## How important to you are noise impacts?

Base: all respondents. (n = 1285)

Very unimportant Very important Don't know

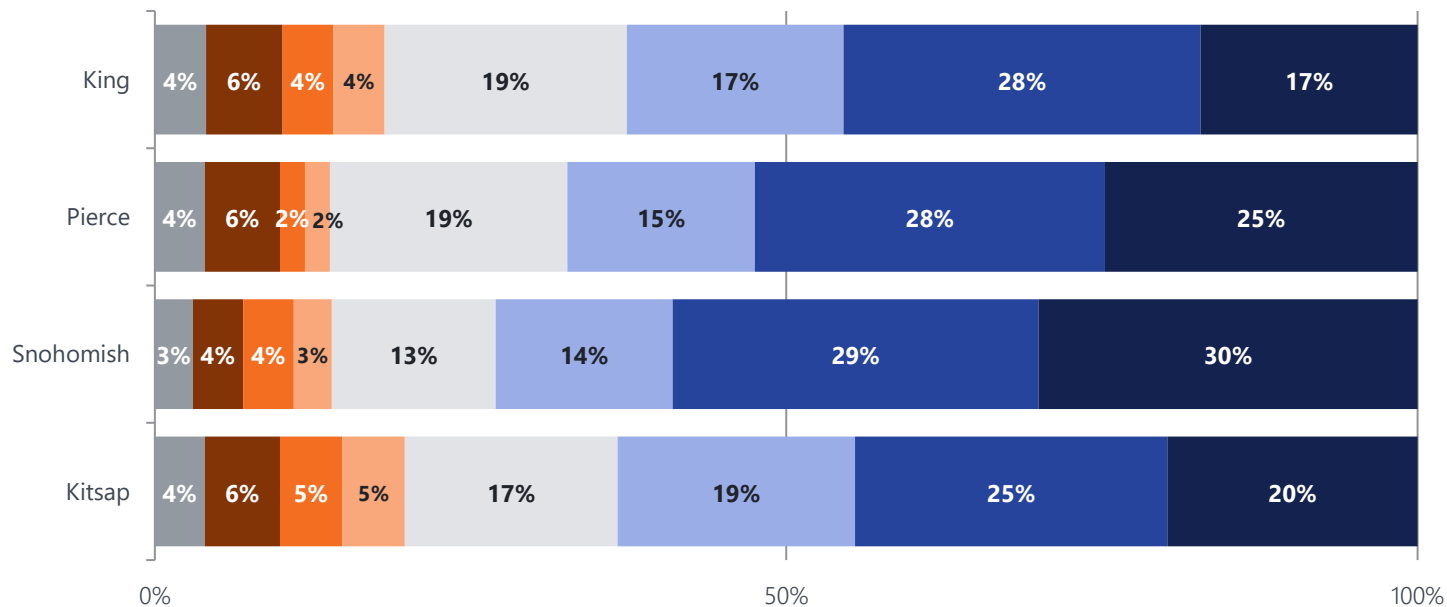


# Economic benefits are important but less so than other aspects, with Snohomish County ranking it higher than other counties

## 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

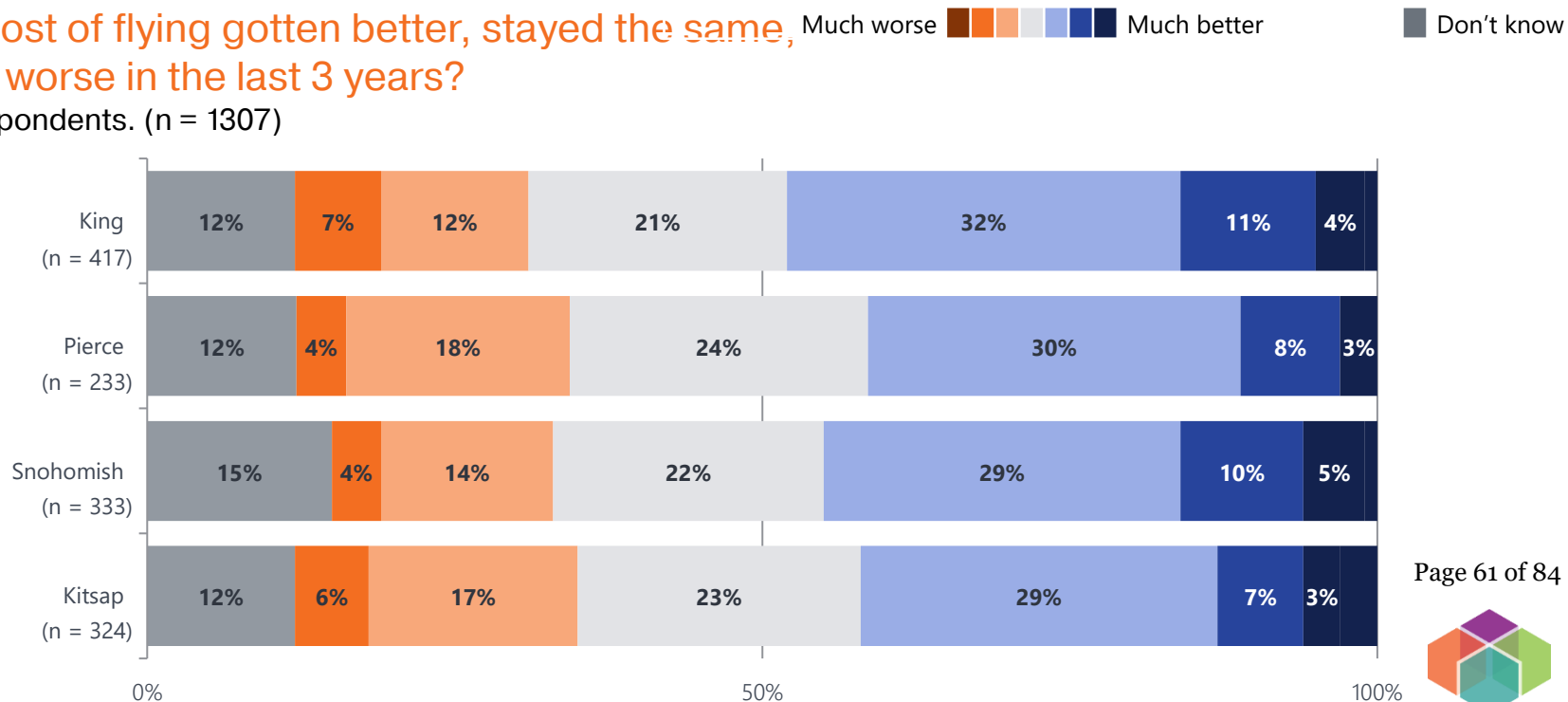
King	Pierce	Snohomish	Kitsap
1. Environmental impacts 2. Noise impacts 3. Parking availability	1. Cost of flying 2. Access to airports 3. Parking availability	1. Noise impacts 2. Environmental impacts 3. Cost of flying	1. Cost of flying 2. Noise impacts 3. Environmental impacts

- 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?

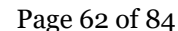
Base: all respondents. (n = 1307)



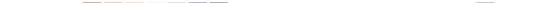

Has the amount of service to a variety of destinations gotten better, stayed the same, or gotten worse in the last 3 years?

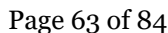
Much worse  Much better

☐ Don't know



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

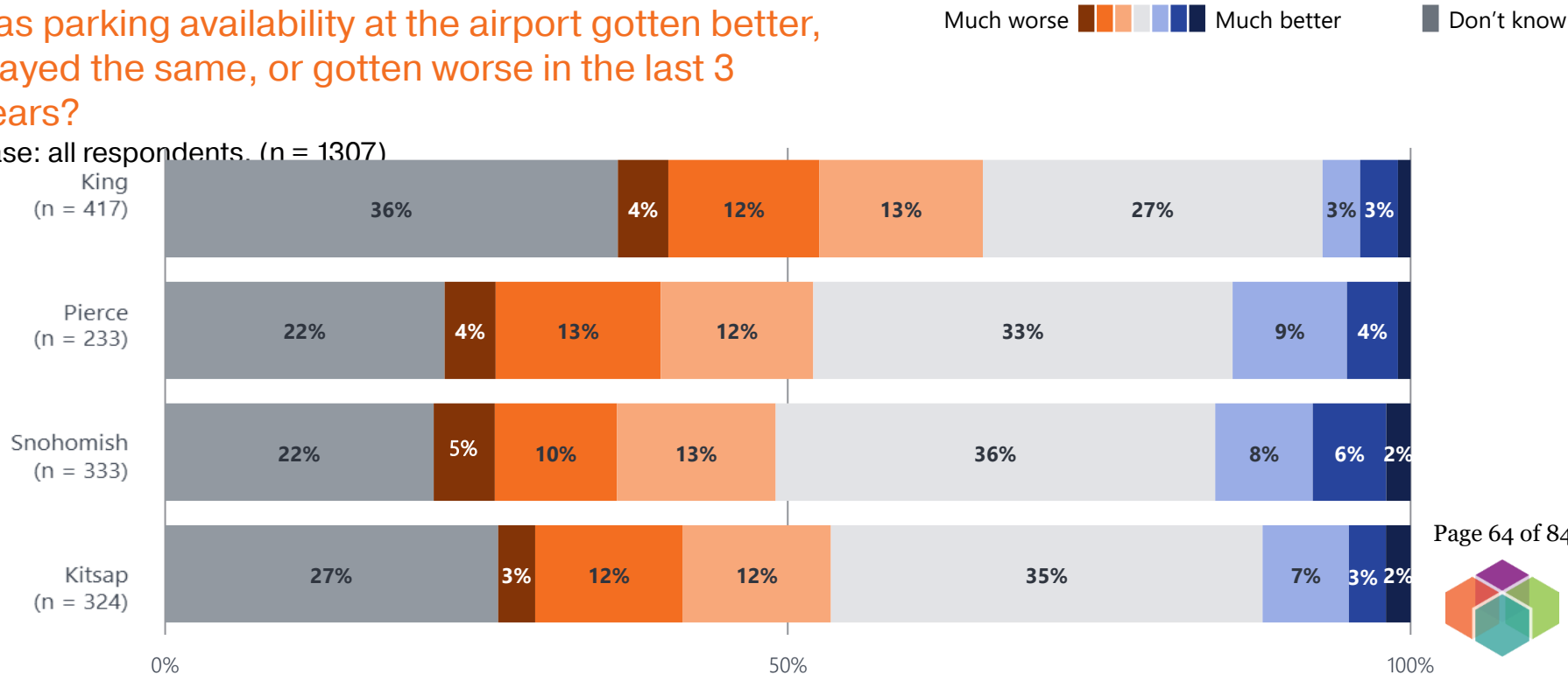
Much worse  Much better  Don't know



# 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?

Base: all respondents. (n = 1307)

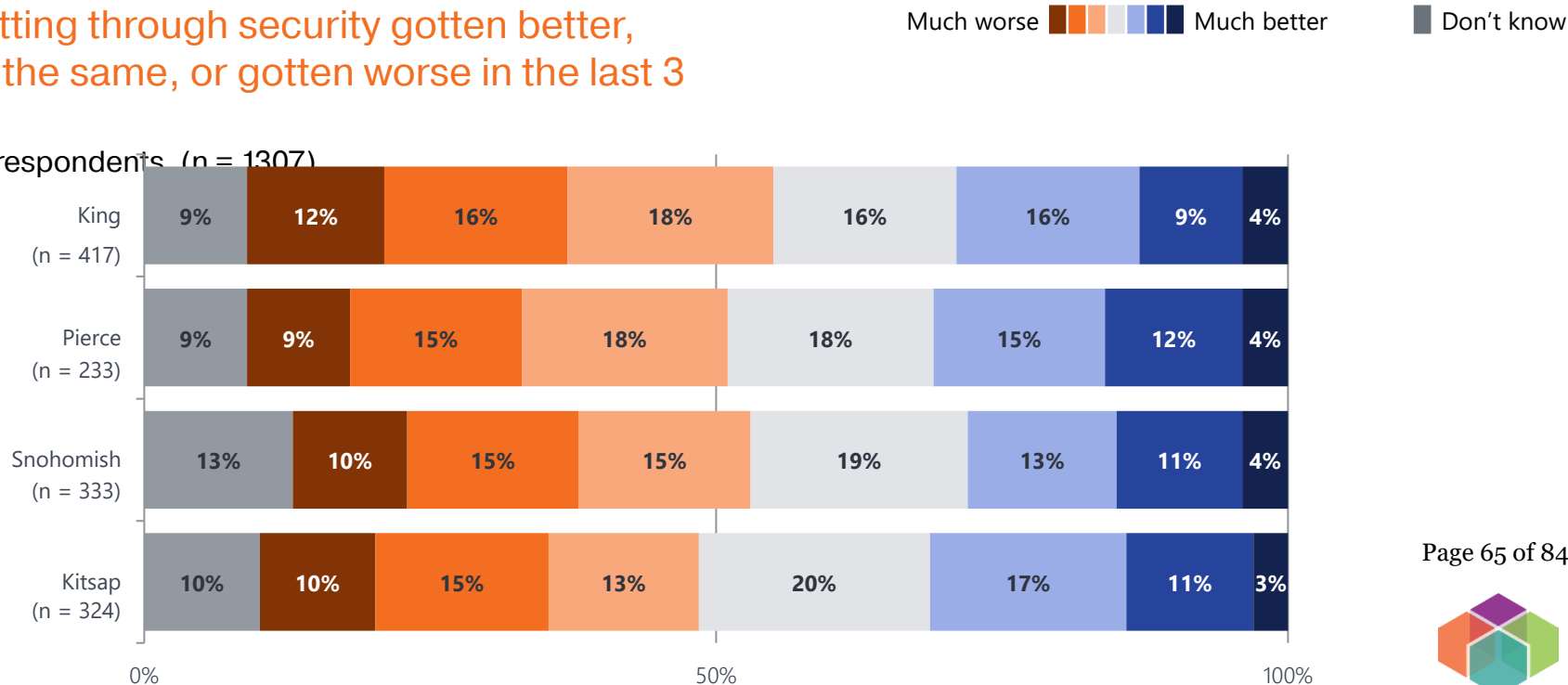




# In all counties, respondents think **getting through security lines** has gotten worse in the last 3 years

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

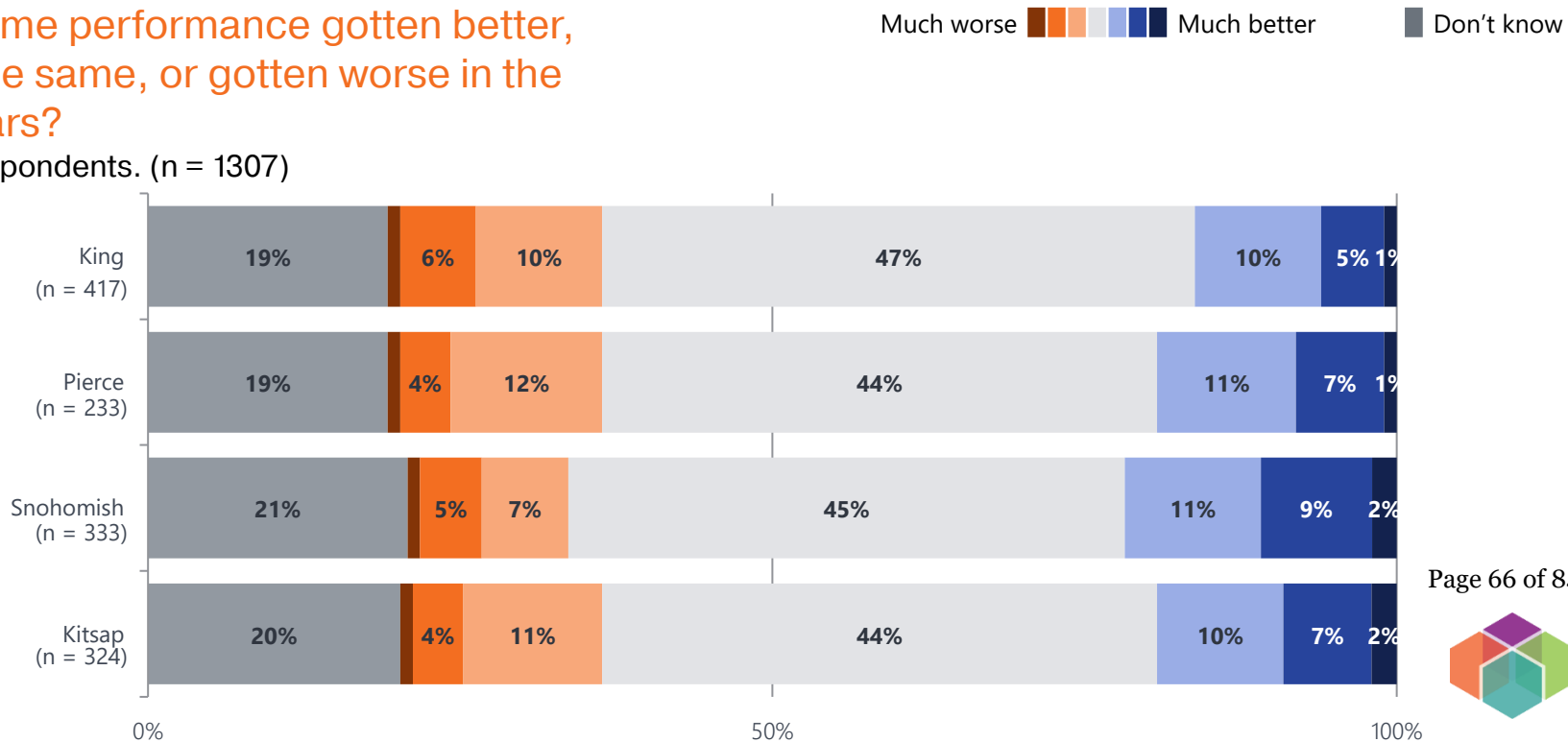
Base: all respondents (n = 1307)



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?

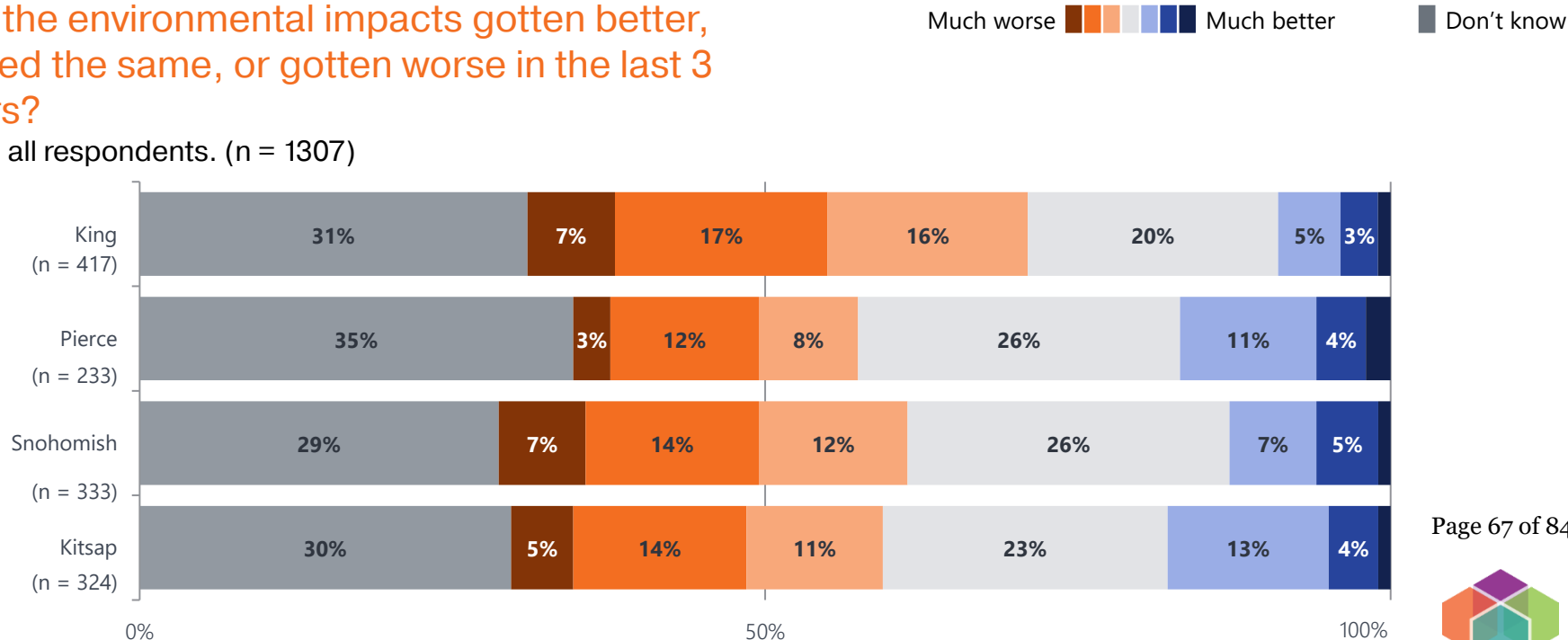
Base: all respondents. (n = 1307)



# 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?

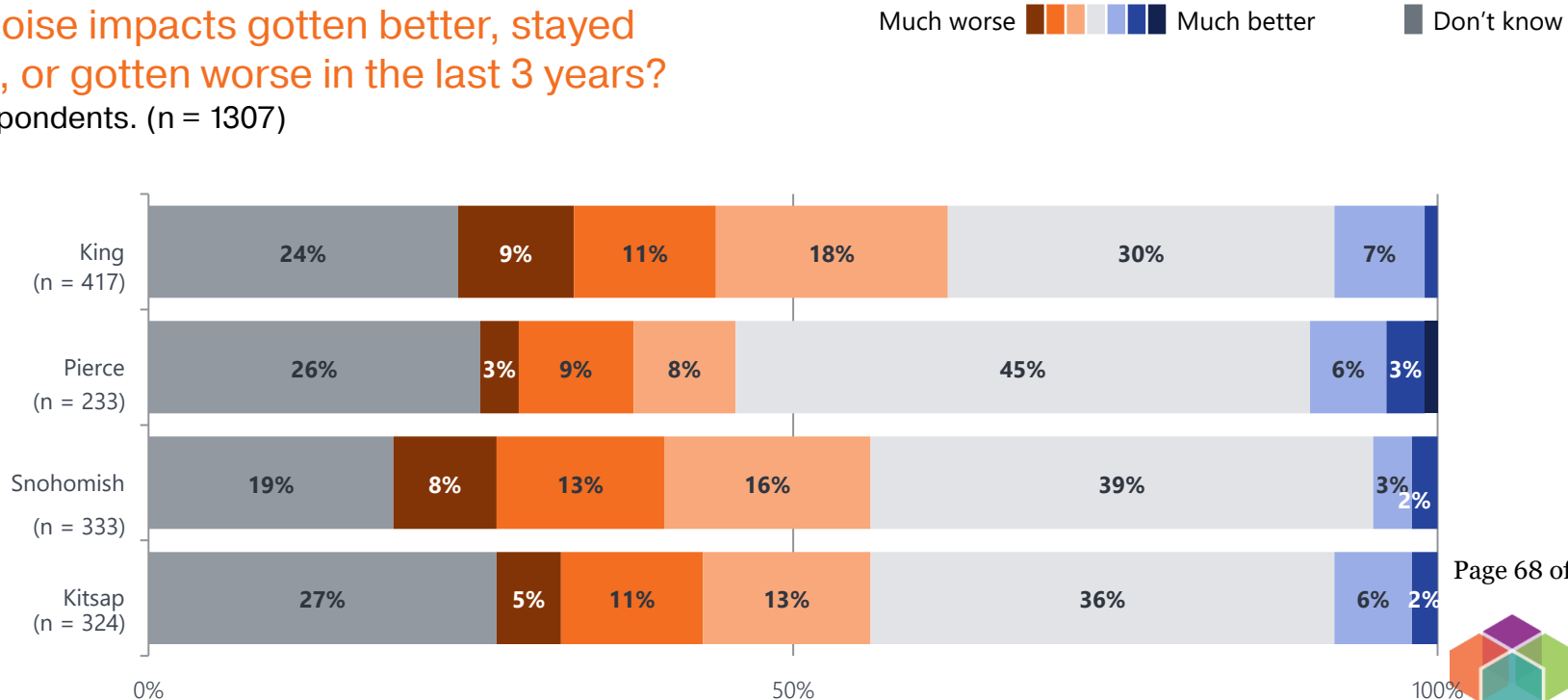
Base: all respondents. (n = 1307)



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?

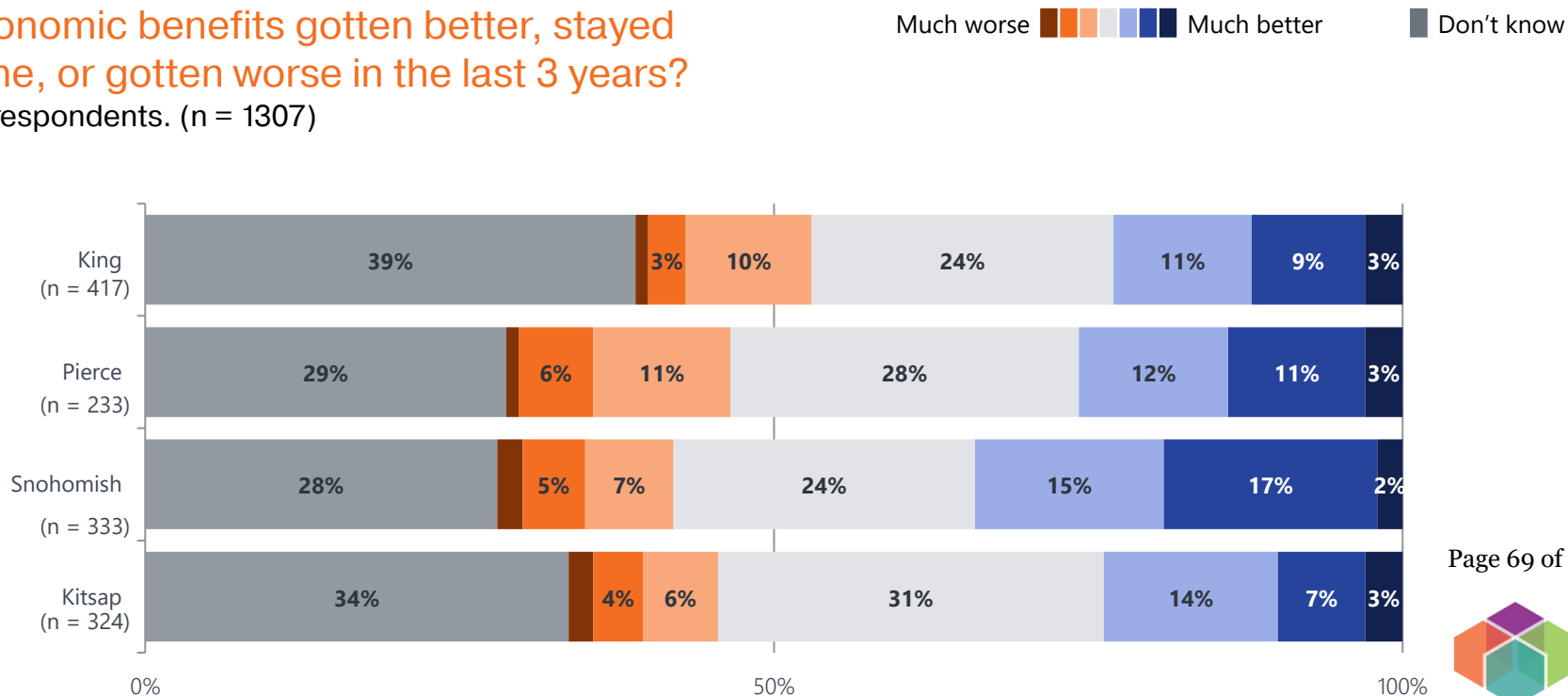
Base: all respondents. (n = 1307)



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)



# 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	Pierce	Snohomish	Kitsap
<ol style="list-style-type: none"><li>1. Environmental impacts</li><li>2. Getting through security lines</li><li>3. Access to airports &amp; Cost of flying (tied between the two features)</li></ol>	<ol style="list-style-type: none"><li>1. Cost of flying</li><li>2. Access to airports</li><li>3. Getting through security lines</li></ol>	<ol style="list-style-type: none"><li>1. Cost of flying</li><li>2. Getting through security lines</li><li>3. Access to airports</li></ol>	<ol style="list-style-type: none"><li>1. Cost of flying</li><li>2. Access to airports</li><li>3. Getting through security lines</li></ol>

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





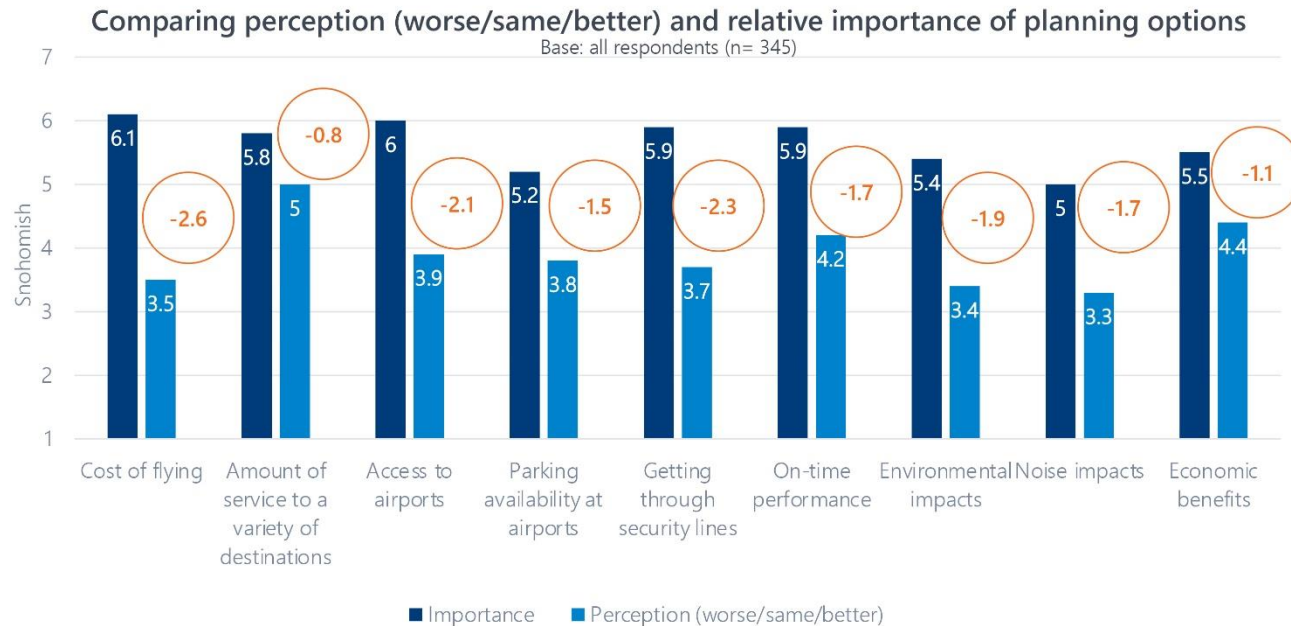
# Among Pierce County residents, the greatest differences between importance and perceived performance are related to **cost of flying** and **access to airports**



The reported differences between perception and importance are statistically significant



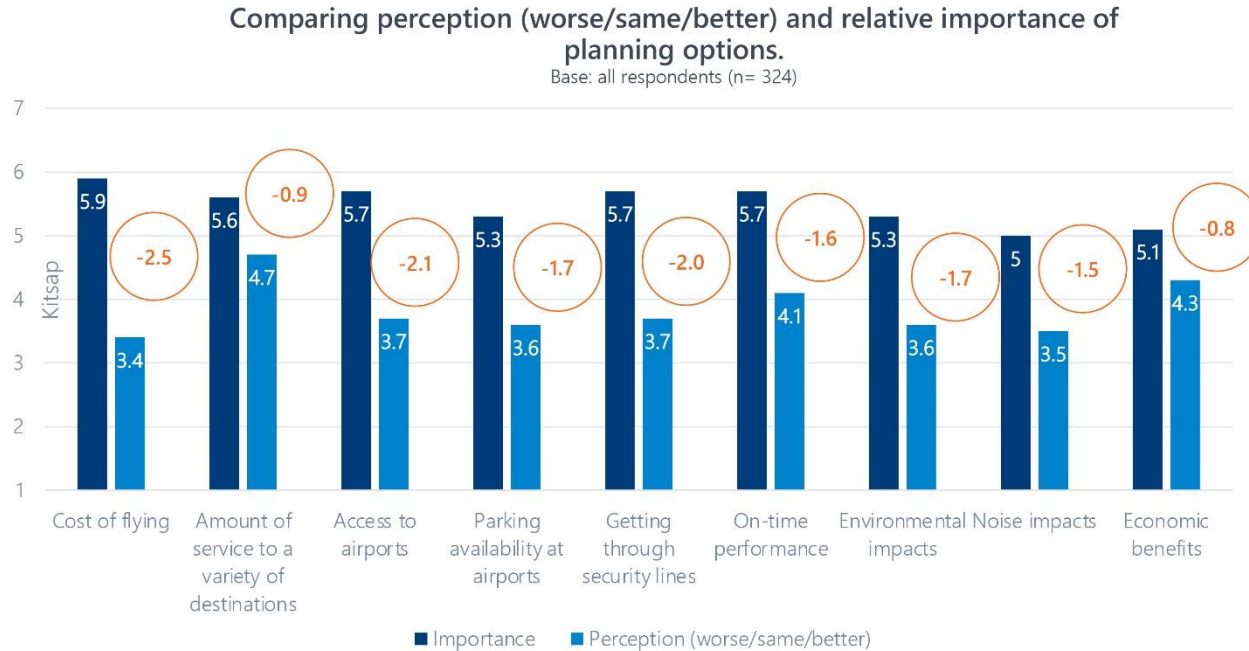
# Among Snohomish County residents, the greatest differences between importance and perceived performance are related to **cost of flying** and **getting through security lines**



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**



*The reported differences between perception and importance are statistically significant*



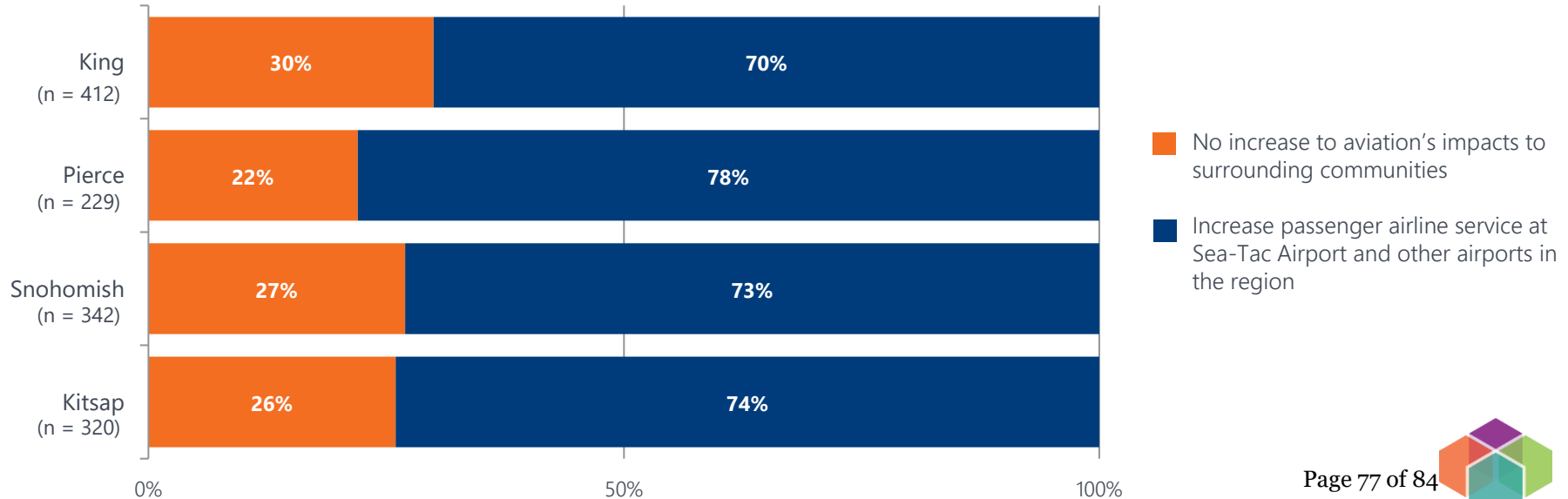
# Trade-Off Aviation Questions



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

## Which is more important to you?

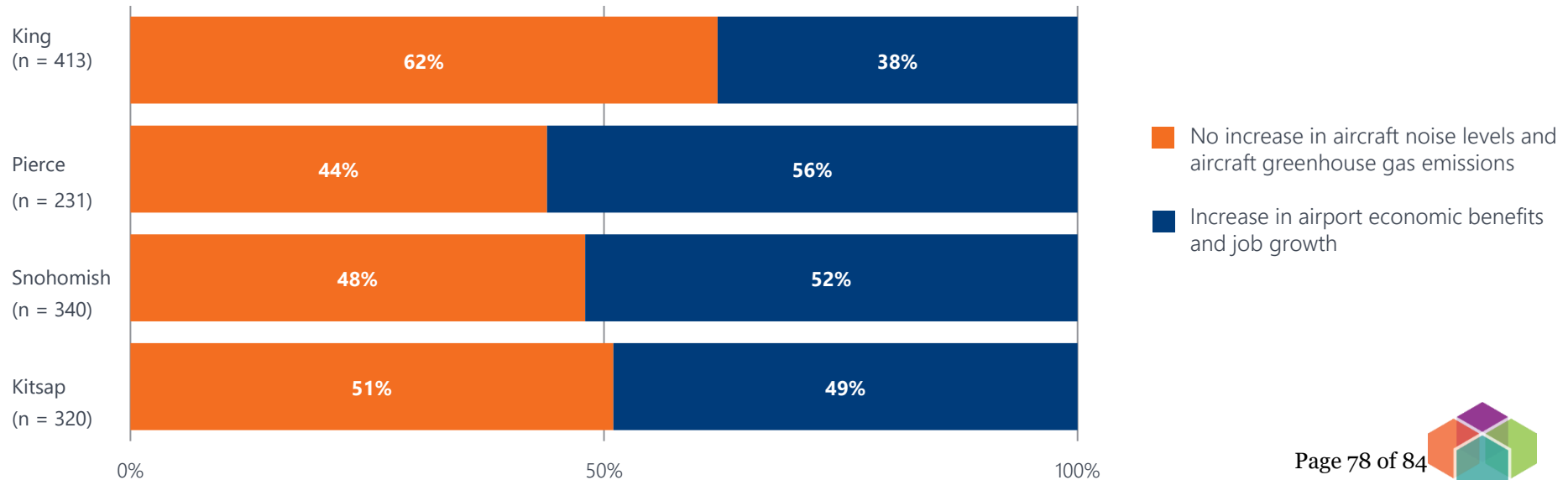
Base: all respondents. (n = 1303)



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

## Which is more important to you?

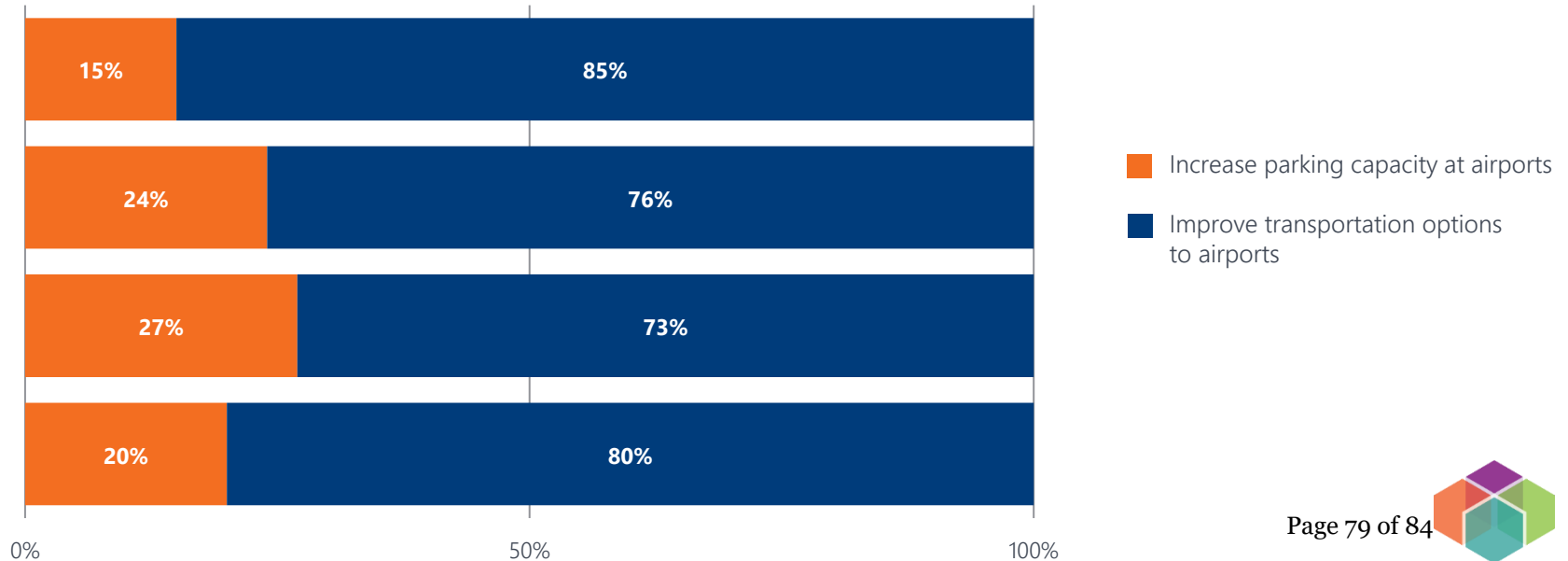
Base: all respondents. (n = 1304)



# 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?

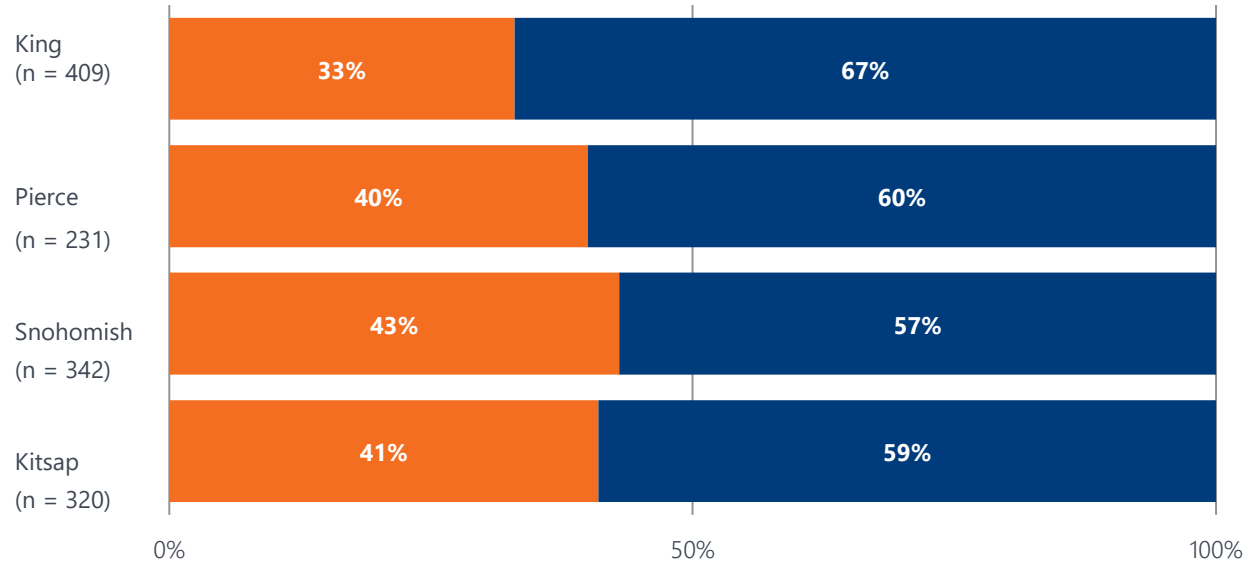
Base: all respondents. (n = 1311)



# 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

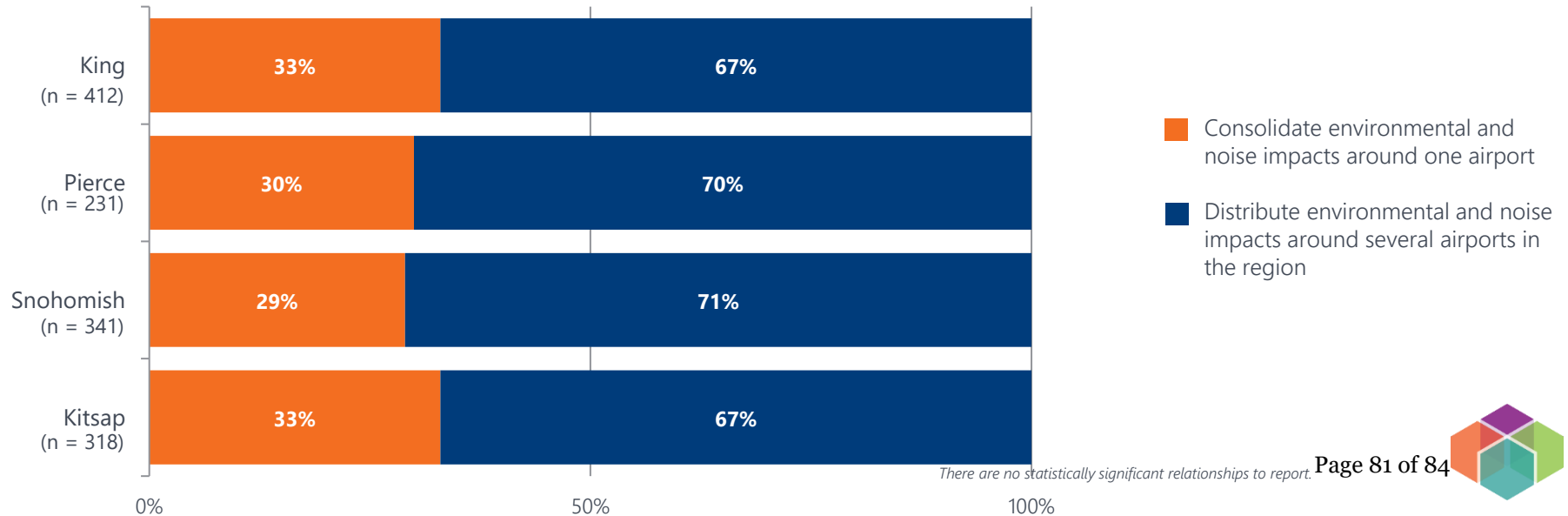




# In all four counties, **distributing environmental and noise impacts** around several airports is more important than **consolidating impacts** around one airport

## Which is more important to you?

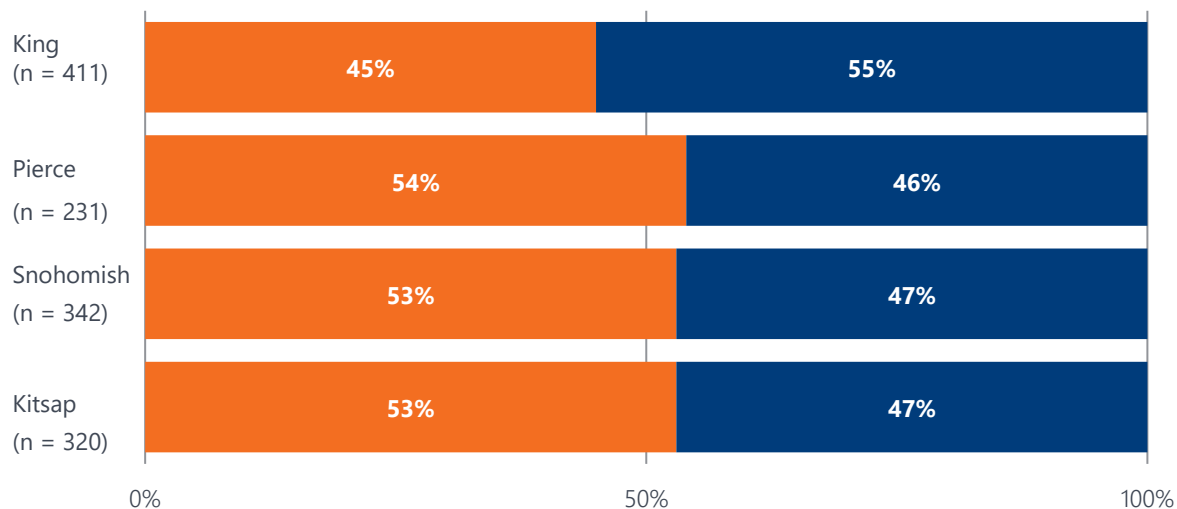
Base: all respondents. (n = 1302)



# 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)



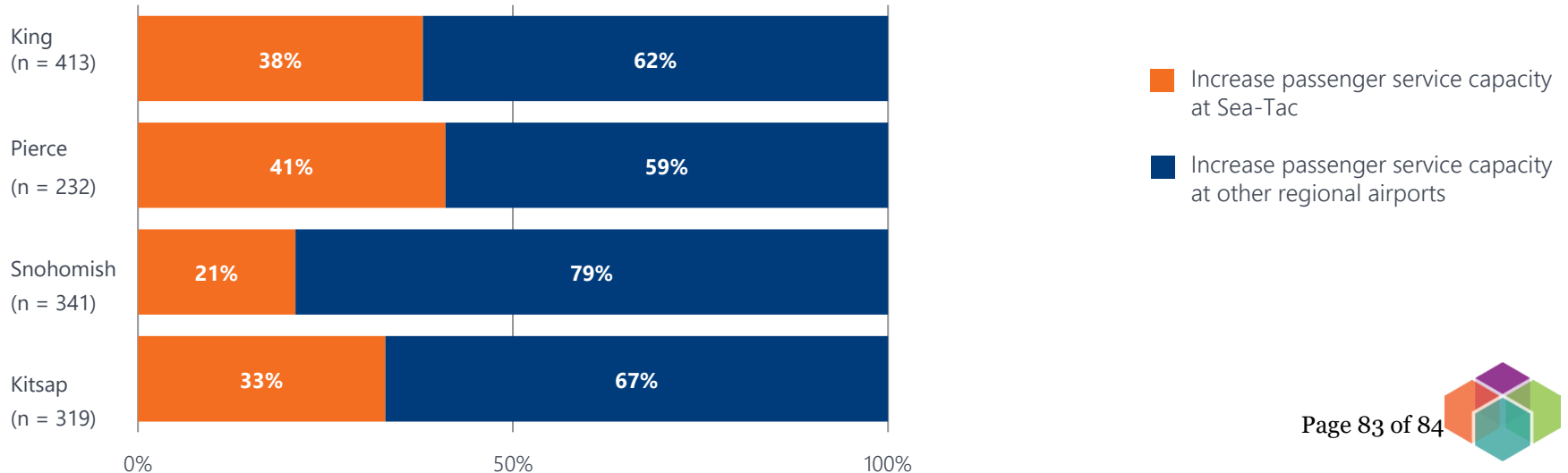
- Increase passenger service capacity Sea-Tac airport and other airports in the region
- Invest in high speed rail to provide an alternative to flying



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)



# Thank you.

