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Truckee Tahoe Airport District Community Survey

August 2017

The Truckee Tahoe Airport District commissioned Godbe Research to conduct a survey of residents and pilots to help validate and refine the strategic vision of the airport and the district. The study was designed with the following research objectives:

- (a) Measure the awareness of the airport in terms of location and operations;
- (b) Measure the community's perception of the airport in terms of positive or negative influence on the quality of life within the community;
- (c) Quantify the community's perception of airport annoyance and test solutions for abatement;
- (d) Assess the needs of the community and pilot population in terms of the airport district and what it can provide; and
- (e) Segment the data by key demographic variables and by geography to uncover differences in subgroups.

Methodology Overview

- Data Collection Telephone (landline and cell phone), email/online, and text/online interviewing
- Universe 23,038 Adult Residents 18+ in the Truckee Tahoe Airport District
216 Pilots provided by the District, plus
28 Pilots from the Resident sample
- Fielding Dates May 26 through June 17, 2017
- Interview Length Residents: 20 minutes
Pilots: 17 minutes
- Sample Size 527 Residents (including 28 residents who self-identified as pilots)
51 Pilots (from District list)
- Margin of Error $\pm 4.34\%$ for the Resident sample



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Executive Summary

Summary

Awareness and Perceptions of the Truckee Tahoe Airport

- In 2017, residents continue to show high awareness of the Truckee Tahoe Airport.
- Use of the airport is significantly higher than in the 2013, 2009 and 2005 surveys, with 75.5 percent of residents visiting the airport for non-aviation reasons.
- Residents' initial favorability rating of the airport is comparable to the 2013 findings and significantly more positive than in 2009 or 2005, although, 16.9 percent of the residents did not have an opinion of the airport.
- The survey suggests that positive opinions of the airport are unsurprisingly high among pilots, with 93.7 percent reporting a favorable opinion of the airport.
- As we have seen in the past, residents and pilots have some different priorities for airport services and capabilities.
 - The residents consider “early forest fire warning”, “patient transport” and “search and rescue” to be top airport services and capabilities.
 - Pilots rated “patient transport”, “pilot recreation use” and “search and rescue” to be the most important services of the airport.

Summary

Awareness and Perceptions of the Truckee Tahoe Airport

- Both residents and pilots agree that “the airport is an important component of the area’s economy” and that “the airport is enabling growth and development in the Truckee-North Lake Tahoe area”.
- At the same time, the residents largely consider regulation of noise and low-flying aircraft to be a role of the airport.
- With respect to the respondents’ vision for the airport, the results are similar to the findings of the 2013, 2009 and 2005 surveys and continue to support the strategic vision of “managed growth.”
 - Overall, 86 percent of the residents, and 79.7 percent of the pilots, agreed that “The airport should manage the growth of operations to be consistent with community needs.”
 - Although managed growth is the most supported strategic vision of the airport across these two groups, the pilots more strongly disagree with the statement that the “airport should reduce the number of flights into and out of the Airport” than the residents. Although, it is important to note that residents disagree with the statement as well, just at a lower level.

Summary

Opinion of Airport Operations and Policies

- A narrow majority of the residents (52.4%) and a clear majority of pilots (58.2%) in the 2017 survey reported that the Truckee Tahoe Airport is doing “about the right amount” to minimize aircraft noise and low-flying aircraft.
- The 2017 results suggest that residents continue to be satisfied with the functions and activities provided by the Truckee Tahoe Airport. For each of the seven functions and activities tested, the satisfied residents significantly outnumbered the dissatisfied residents. Residents were most satisfied with:
 - Provide community events like the Truckee Tahoe Airport Air Show and Family Festival
 - Provide space for community events and meetings at airport facilities
 - Provide high quality community aviation facilities and services to meet local needs
 - Provide a playground on airport grounds
 - Provide residents with information on airport events, operations, and activities

Summary

Opinion of Airport Operations and Policies

- Satisfaction with the functions and activities of the airport was very high among the pilots surveyed. The average pilot was at least somewhat satisfied with 6 of the 8 tested functions and activities of the airport.
 - Satisfaction was substantially lower with hangar facilities and fees, and the pilots most frequently requested more hangar access (17.6%), followed by competitive fuel prices (15.7%) and a permanent tower (15.7%).
- Seventy-six percent of the residents had a favorable impression of the Airport after the operations and policy sections of the survey.

- Similar to previous surveys, three-quarters of the residents were not aware of the purchase of the Tahoe City Golf Course.
- As in 2013, 2009 and 2005, residents and pilots generally have a common opinion and vision of the airport. At the same time, these two groups differ in their attitudes toward airport regulations and limitations, particularly concerning aircraft noise and low-flying aircraft. As such, communications on these issues should carefully consider their divergent perspectives and opinions.



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Key Findings



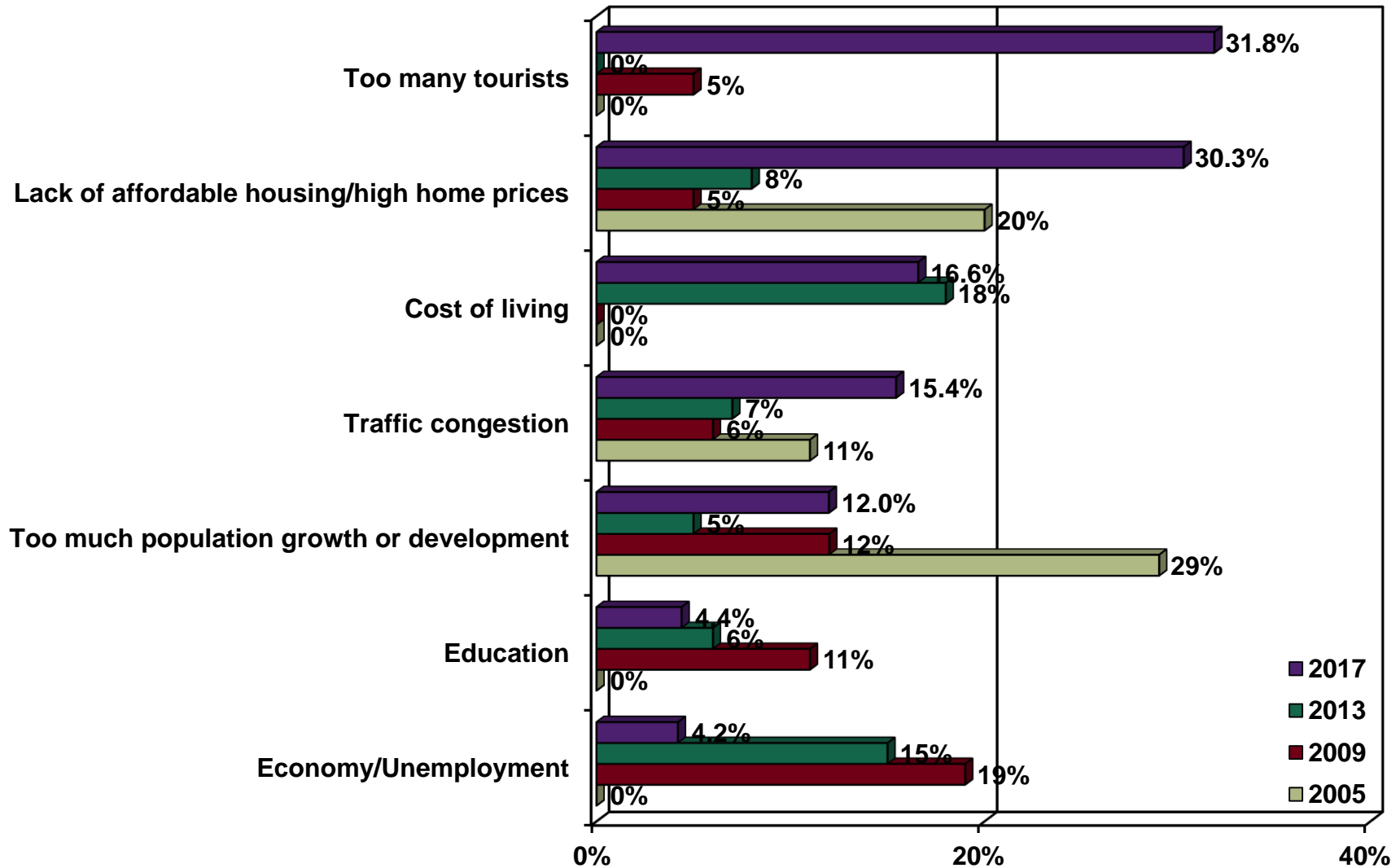
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Perceived Community Issues

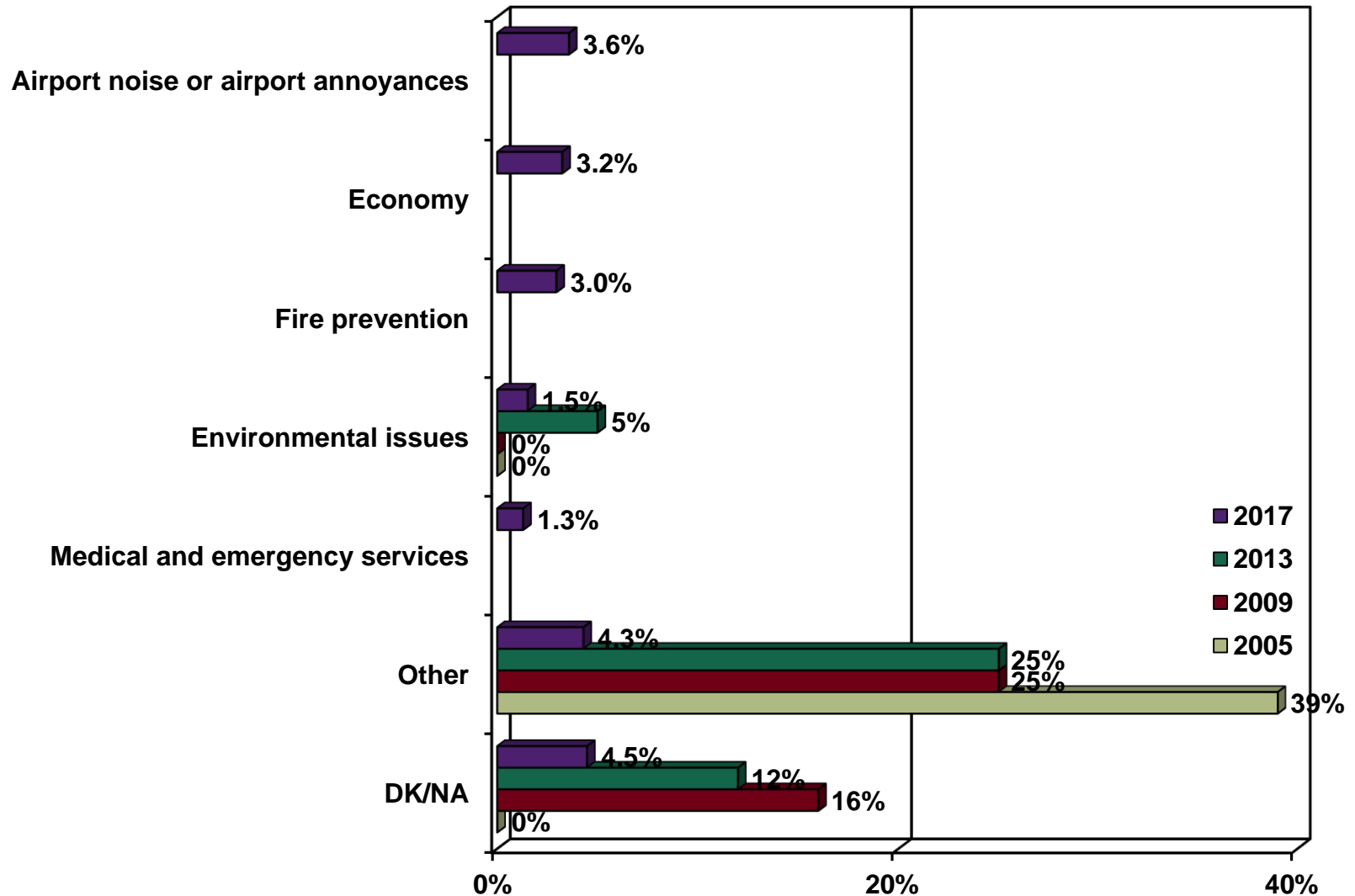
Q1. Perceived Community Issues

Residents



Q1. Perceived Community Issues

Residents





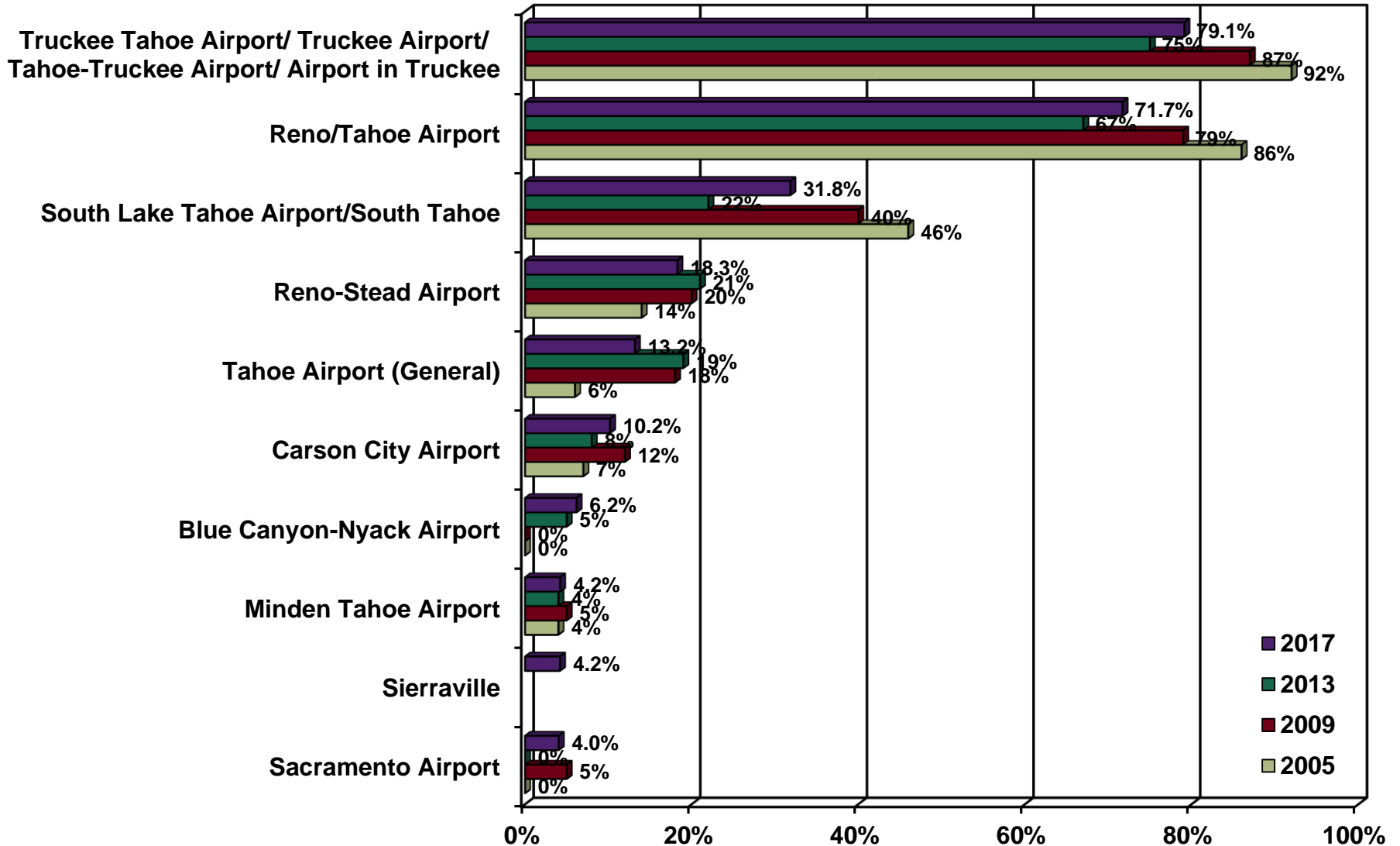
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Awareness and Perceptions of the Airport

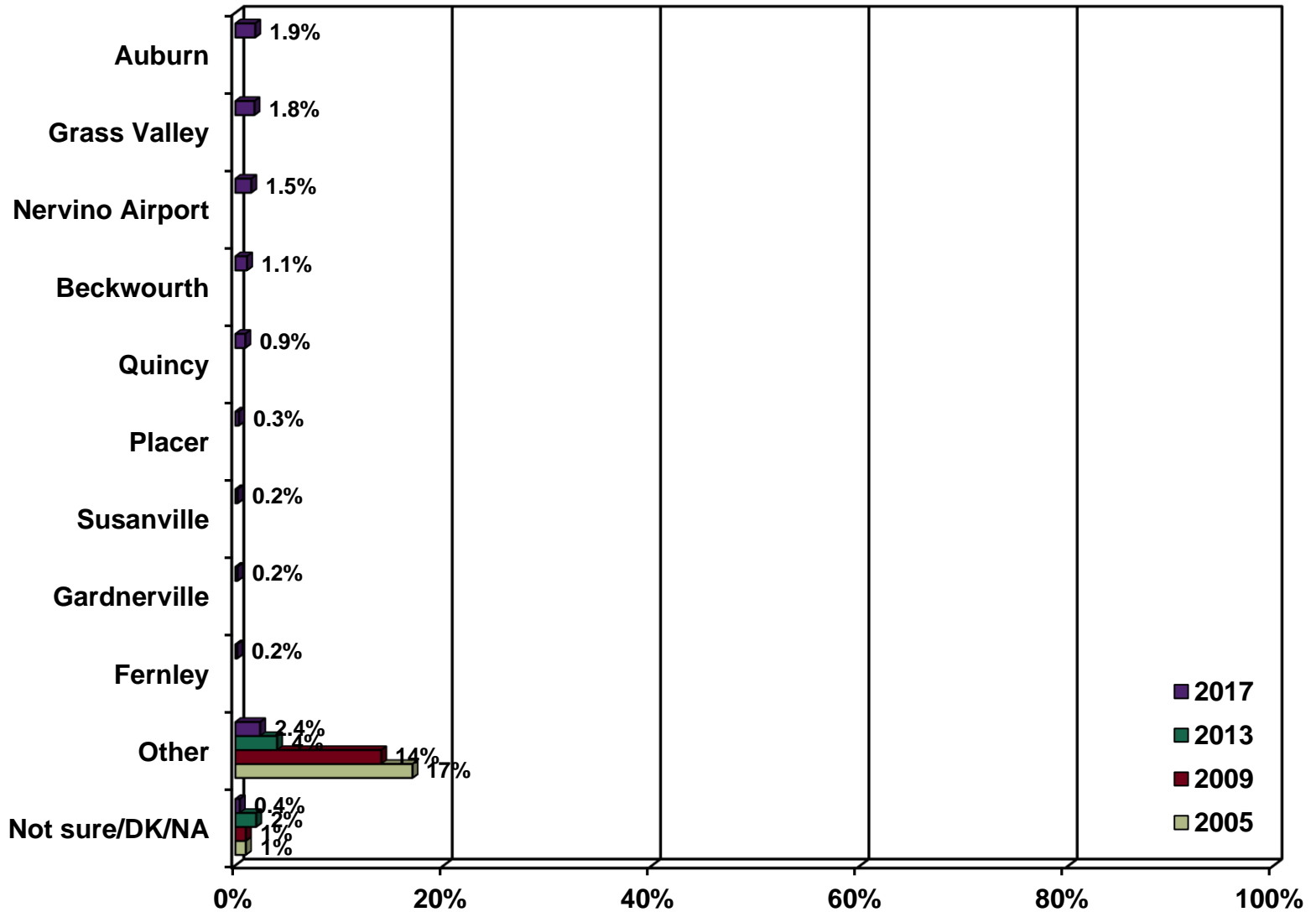
Q2. Unaided Awareness of Local Airports

Residents



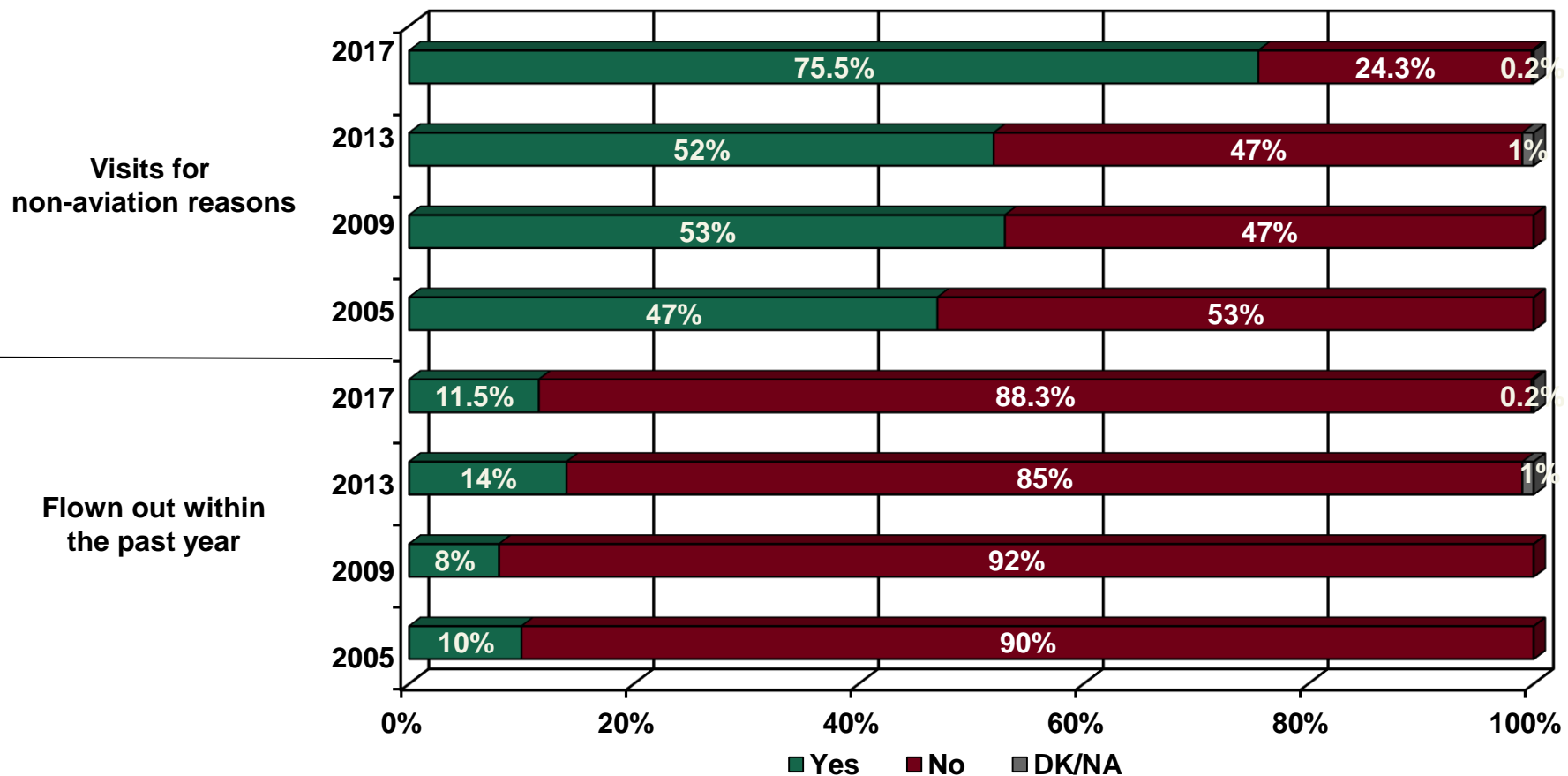
Q2. Unaided Awareness of Local Airports

Residents



Q19 & 20. Use of the Truckee Tahoe Airport Residents

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Q3. Favorability of the Truckee Tahoe Airport

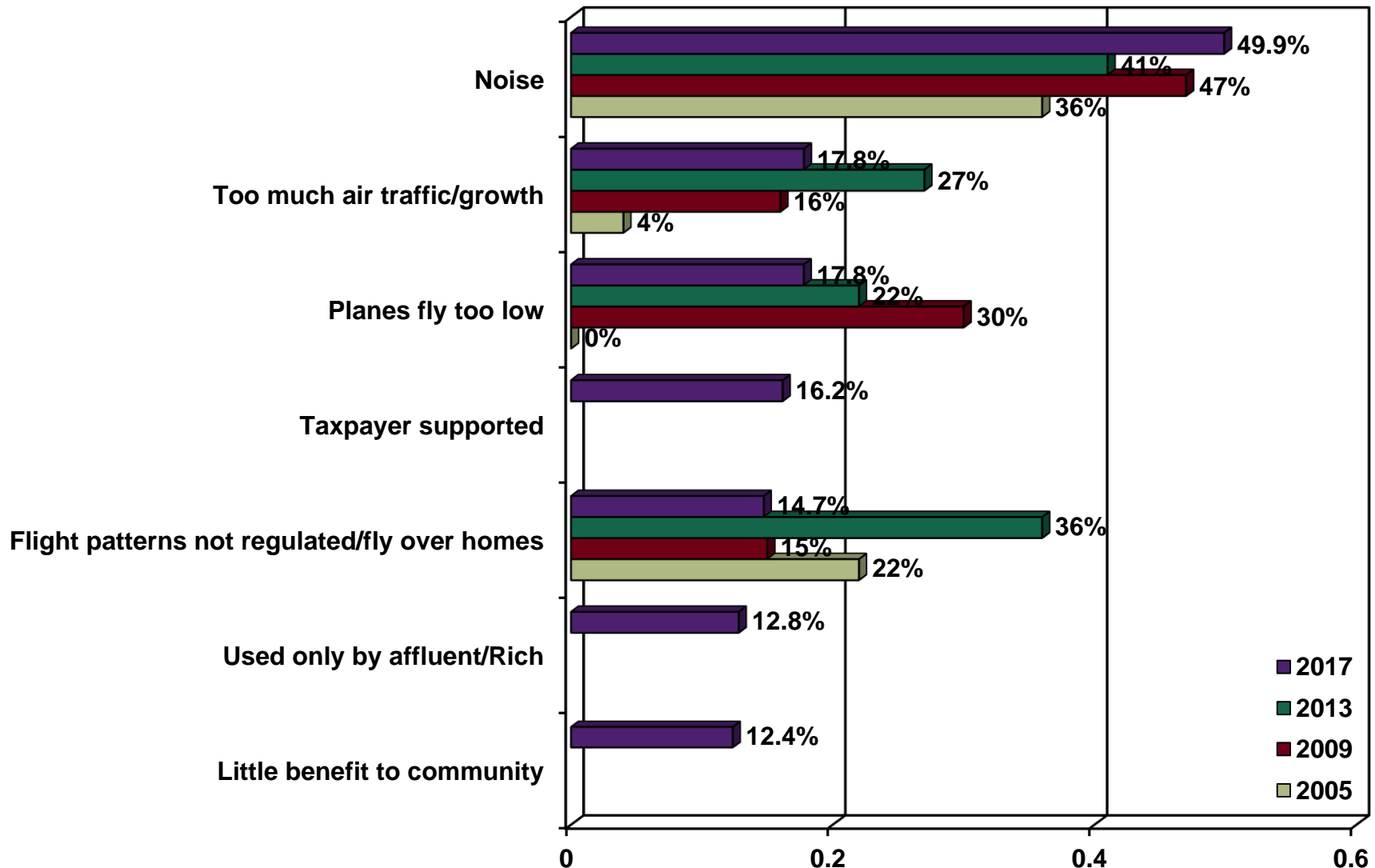
Residents and Pilots

Residents	2017	2013	2009	2005
Strongly favorable	30.3%	37%	24%	21%
Somewhat favorable	35.7%	32%	30%	24%
Somewhat unfavorable	11.4%	4%	5%	13%
Strongly unfavorable	5.7%	3%	3%	9%
No opinion/DK/NA	16.9%	24%	38%	34%

Pilots	2017	2013	2009
Strongly favorable	73.4%	80%	90%
Somewhat favorable	20.3%	14%	6%
Somewhat unfavorable	3.8%	2%	2%
Strongly unfavorable	1.3%	0%	0%
No opinion/DK/NA	1.3%	5%	2%

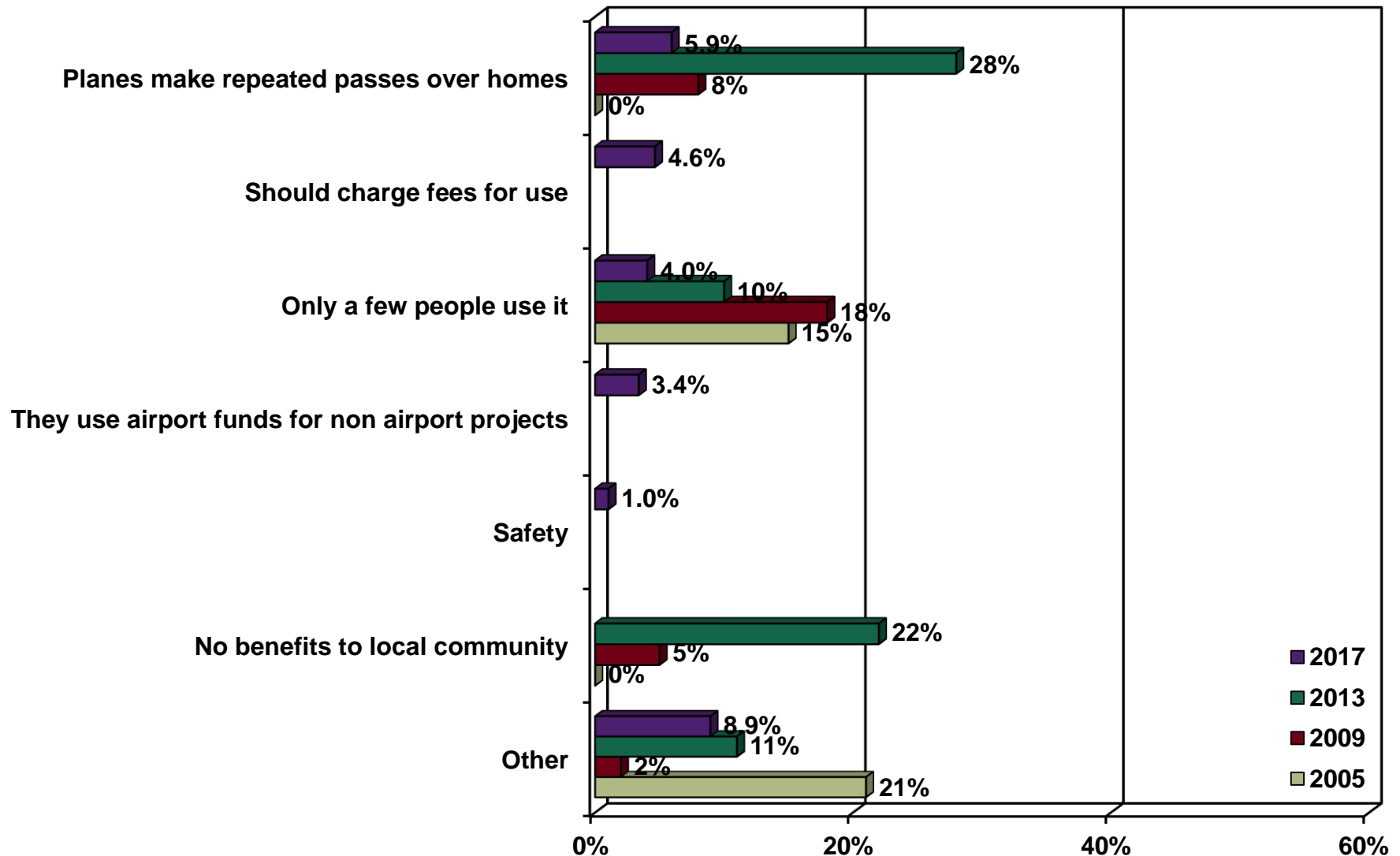
Q4. Reasons for Unfavorable Opinion

Residents



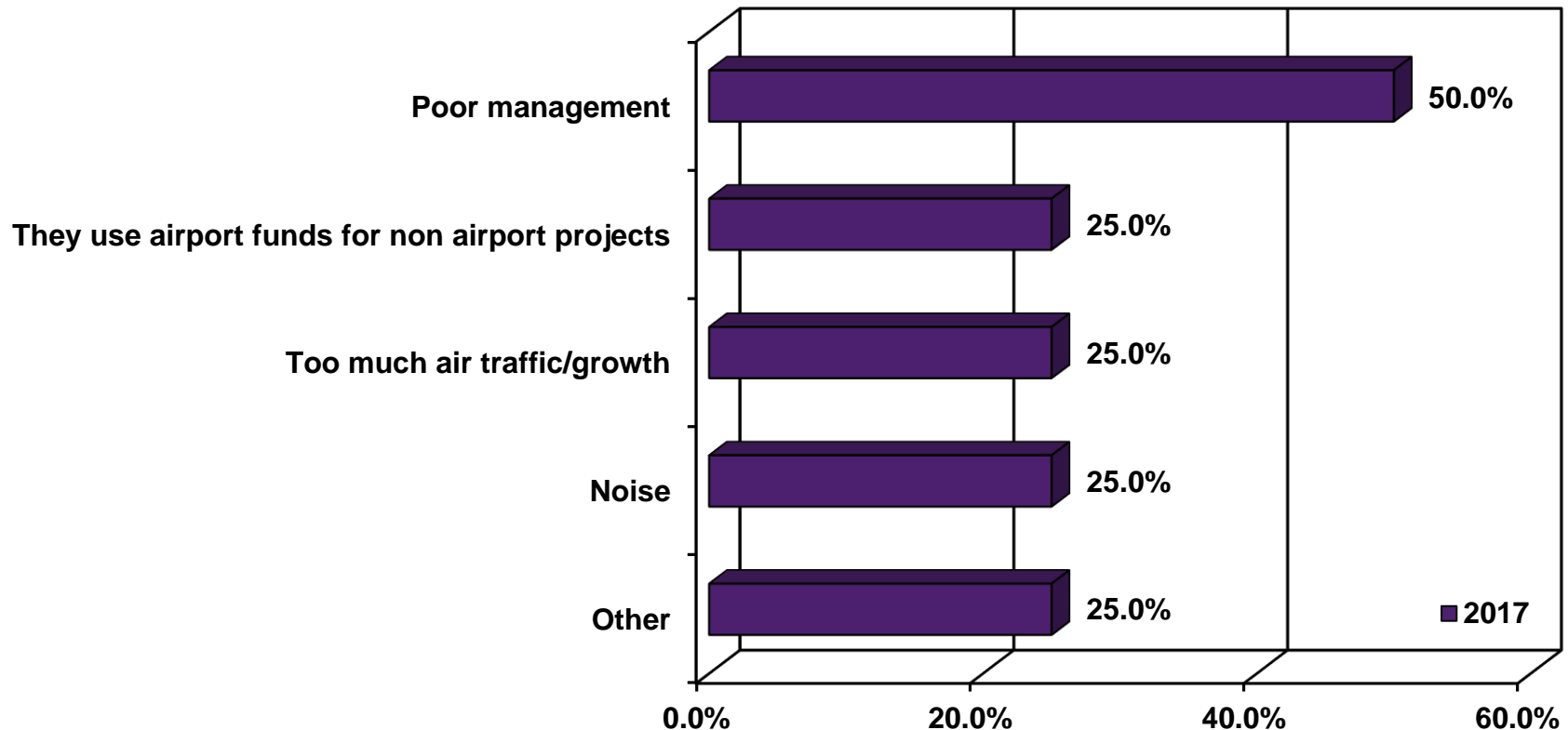
Q4. Reasons for Unfavorable Opinion

Residents



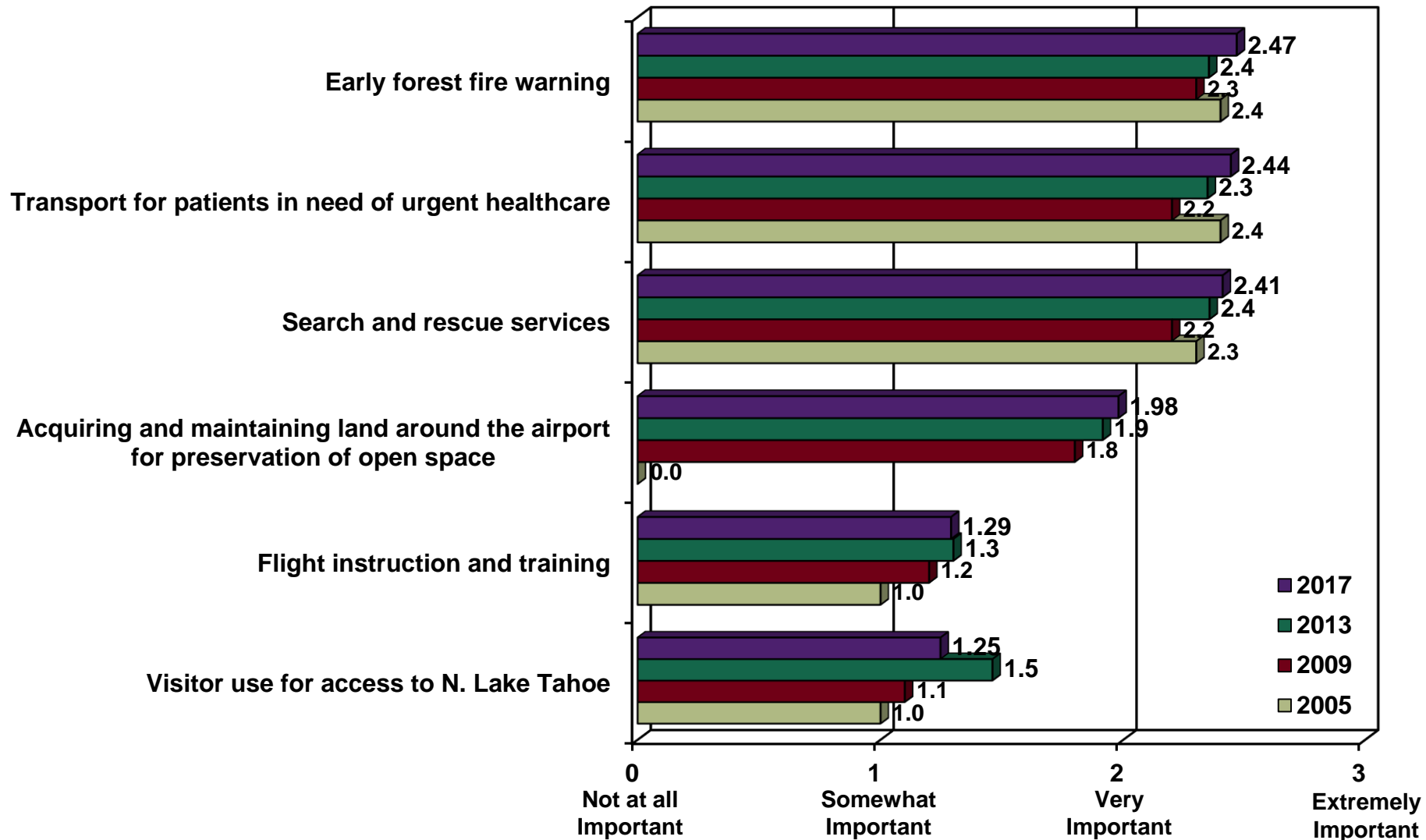
Q4. Reasons for Unfavorable Opinion

Pilots



Q5. Importance of Services and Capabilities

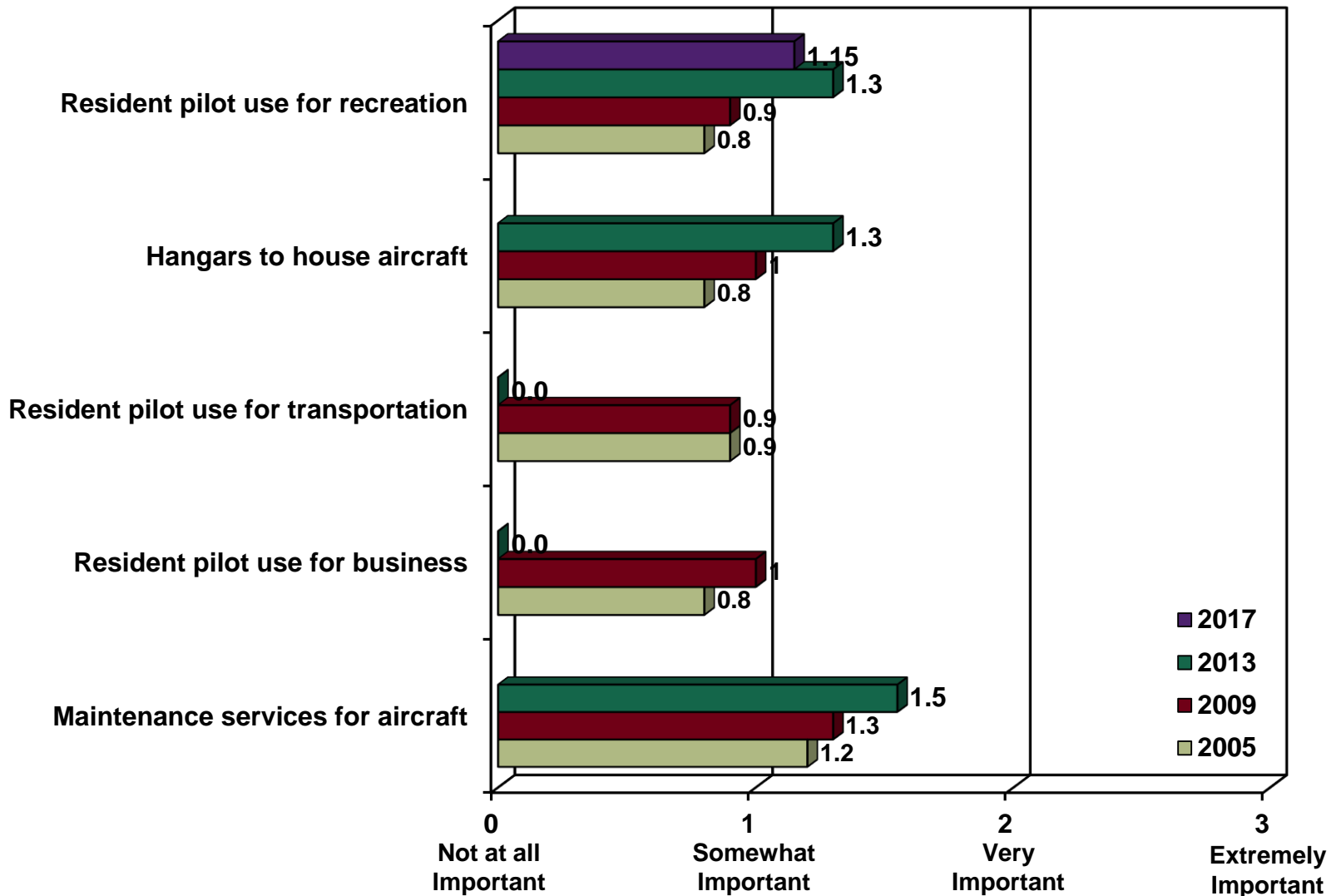
Residents



Note: The above rating questions have been abbreviated for charting purposes; for the exact wording, please see the Topline report. The responses were recoded to calculate mean scores: "Extremely Important" = +3, "Very Important" = +2, "Somewhat Important" = +1, and "Not at all Important" = 0.

Q5. Importance of Services and Capabilities

Residents



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Q5. Importance of Services and Capabilities Pilots

	2017	2013	2009	2005
Transportation for patients in need of urgent healthcare	2.5	2.4	2.3	2.4
Resident pilot use for recreation	2.4	2.4	2.4	2.1
Search and rescue services	2.38	2.3	2.2	2.4
Early forest fire warning	2.21	2.2	2.3	2.5
Visitor use for access to the North Lake Tahoe region	2.15	2.2	2.3	2.5
Acquiring and maintaining land around the airport for preservation of open space	1.92	1.7	1.7	-
Flight instruction and training	1.91	1.8	1.7	1.9
Hangars to house aircraft	-	2.2	2.6	2.6
Maintenance services for aircraft	-	2.2	2.1	2.1
Resident pilot use for transportation	-	-	2.3	2.5
Resident pilot use for business	-	-	2.1	2.1



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Opinion of Airport Operations and Policies

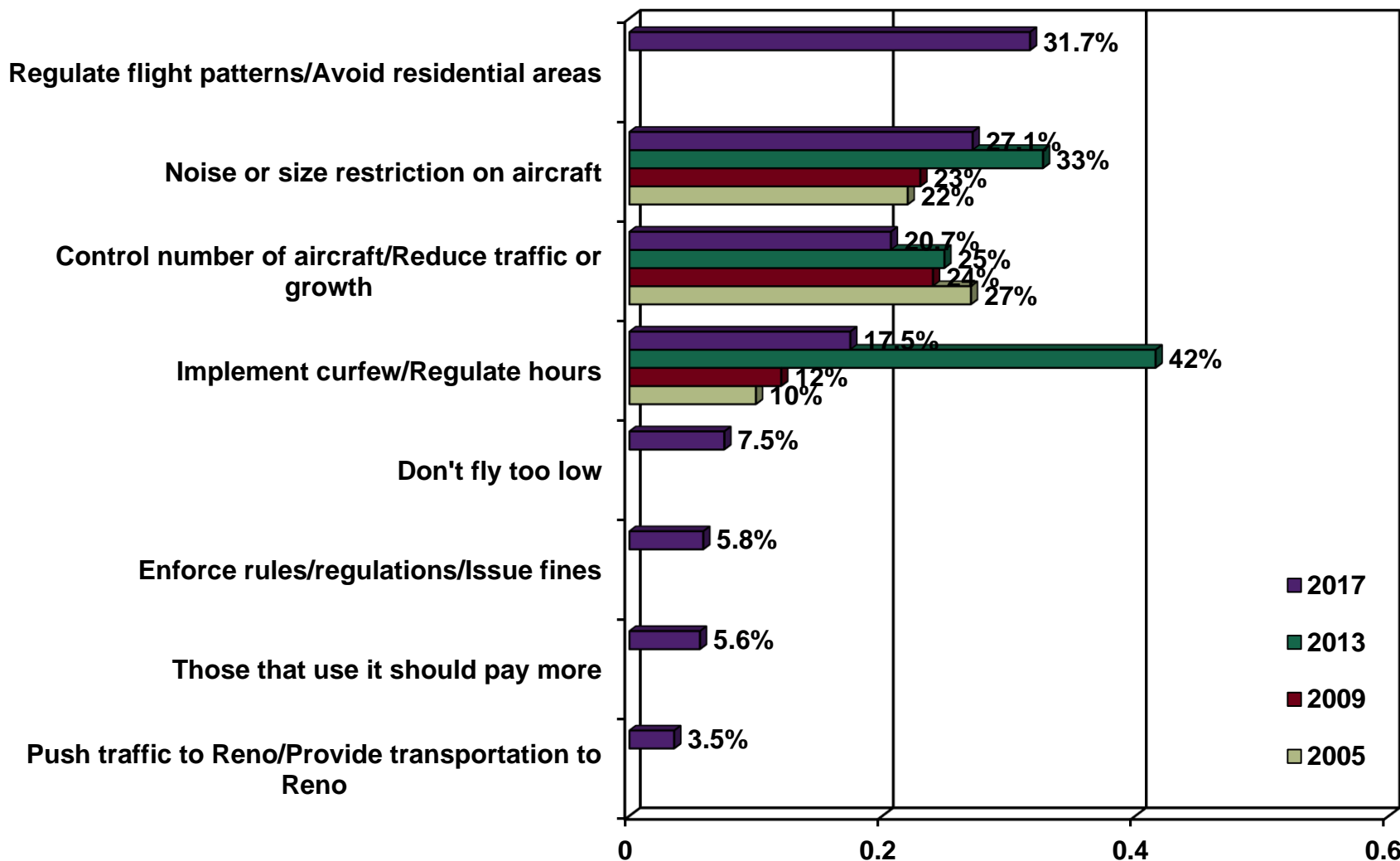
Q6. Perception of Flight Operation Policies to Minimize Noise & Low-Flying Aircraft

Residents	2017	2013	2009	2005
Too much	3.4%	4%	4%	2%
About the right amount	52.4%	60%	59%	43%
Not enough	25.2%	18%	16%	34%
No opinion/DK/NA	18.9%	19%	21%	21%

Pilots	2017	2013	2009	2005
Too much	34.2%	25%	28%	12%
About the right amount	58.2%	71%	70%	88%
Not enough	2.5%	5%	0%	0%
No opinion/DK/NA	5.1%	0%	2%	0%

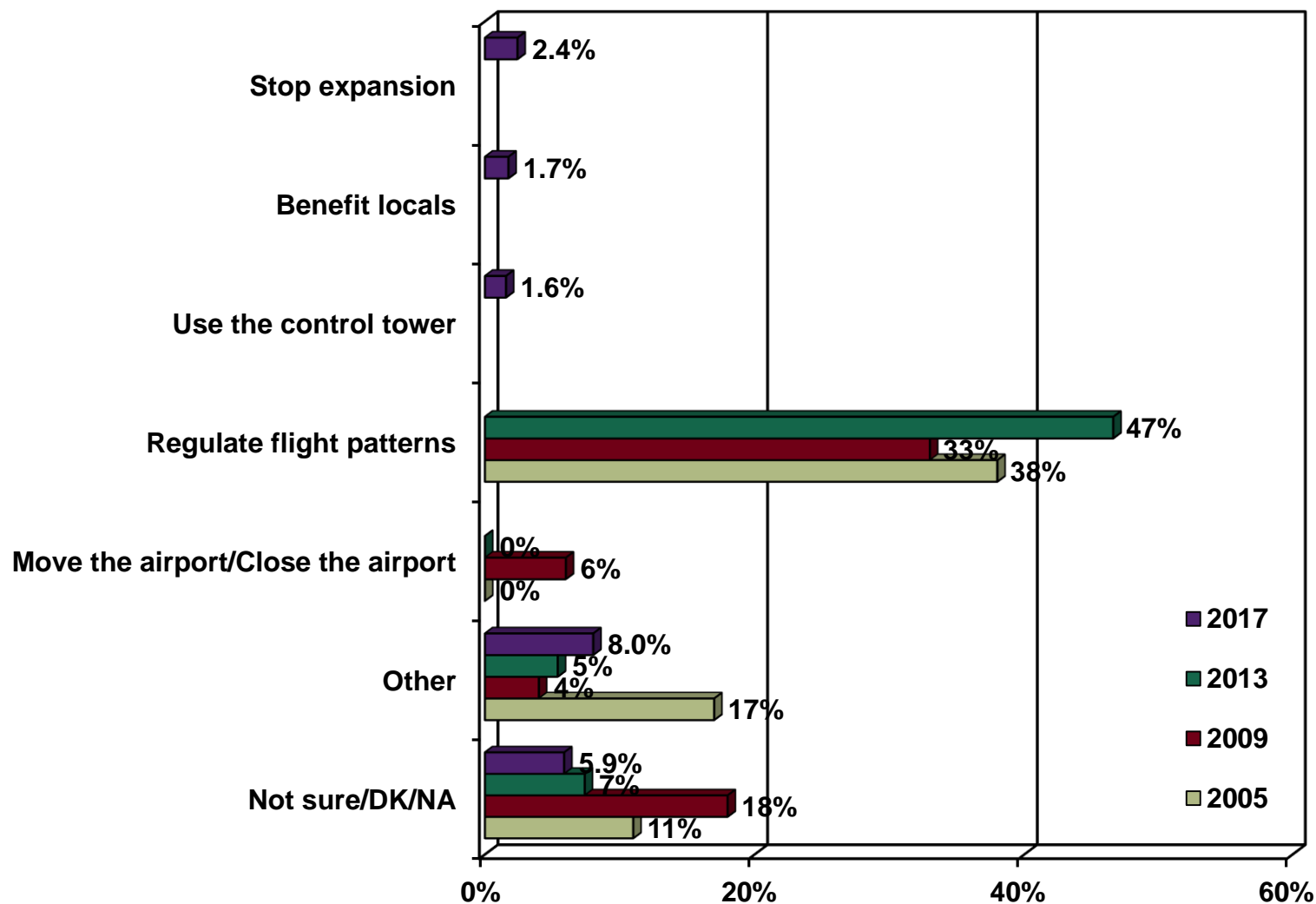
Q7. Suggestions to Minimize Noise and Low-Flying Aircraft

Residents



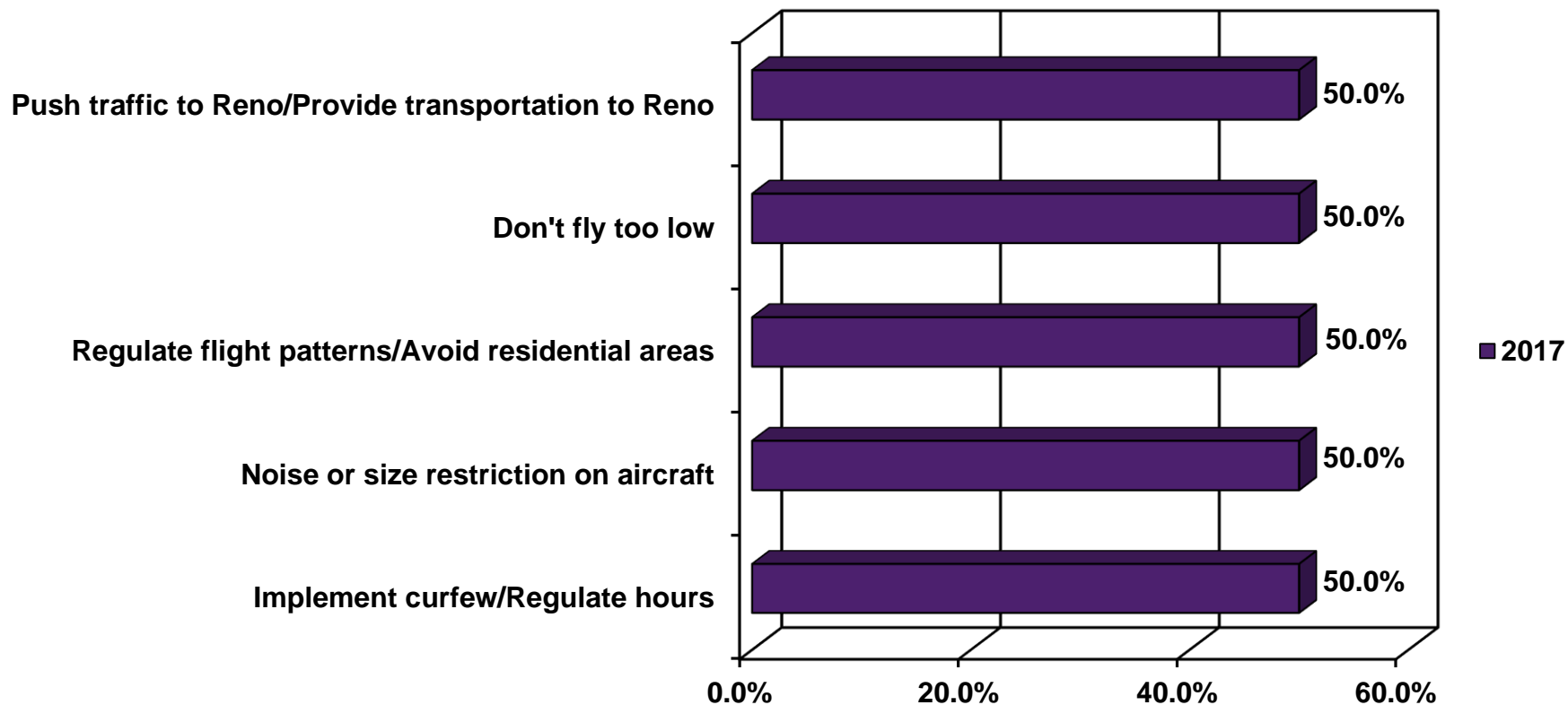
Q7. Suggestions to Minimize Noise and Low-Flying Aircraft

Residents



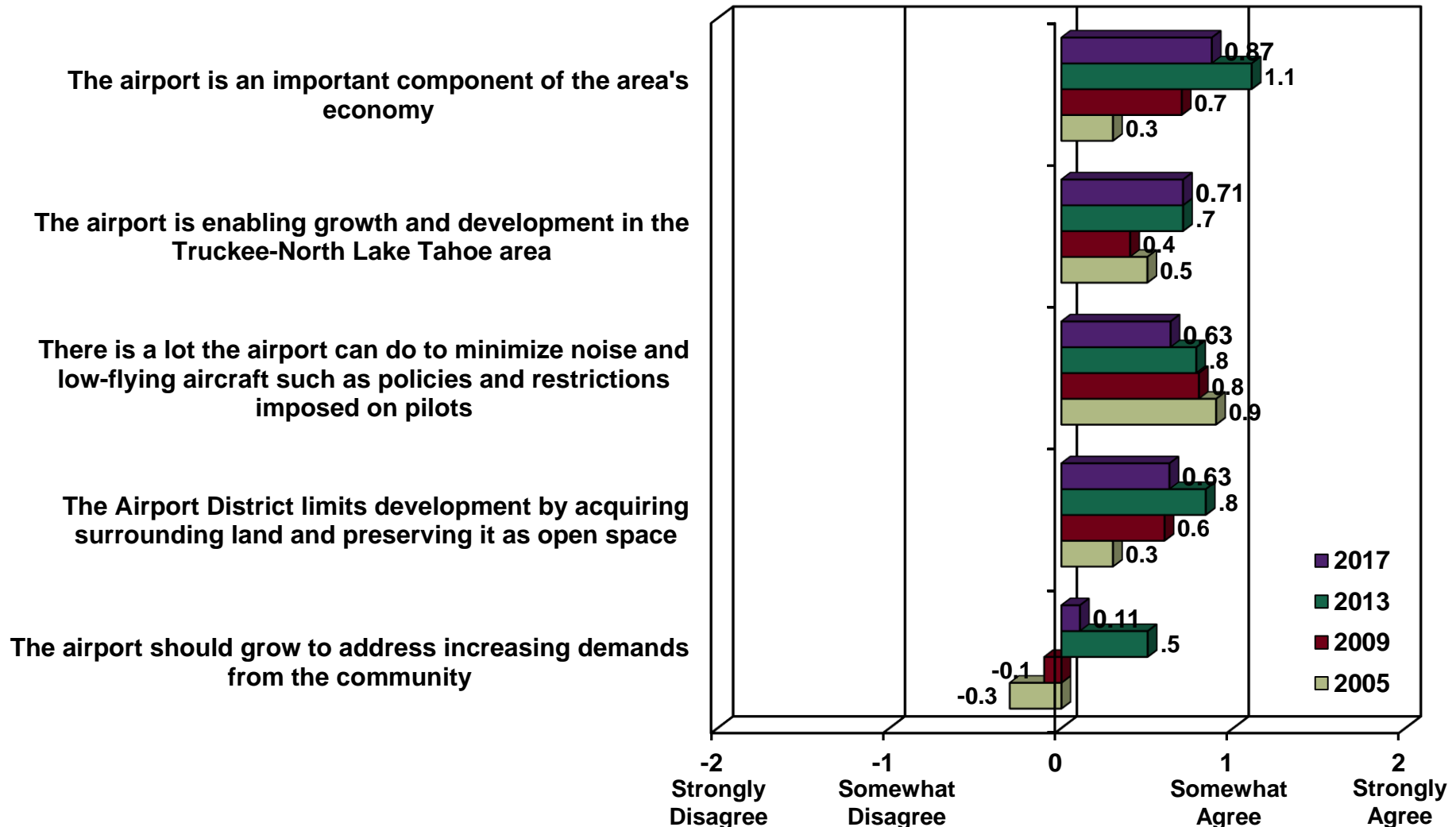
Q7. Suggestions to Minimize Noise and Low-Flying Aircraft

Pilots



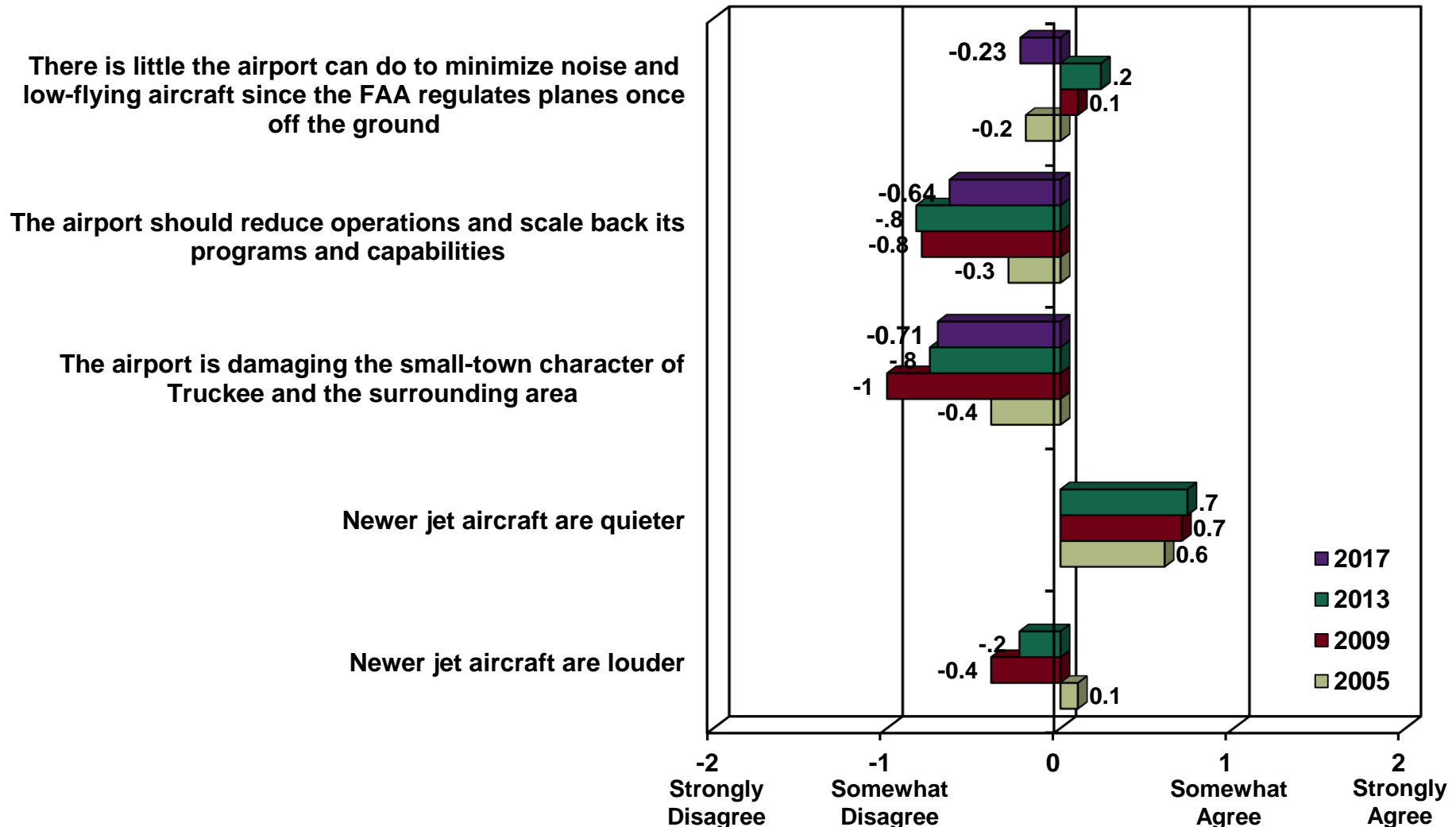
Q8. Airport's Role in the Community

Residents



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Residents



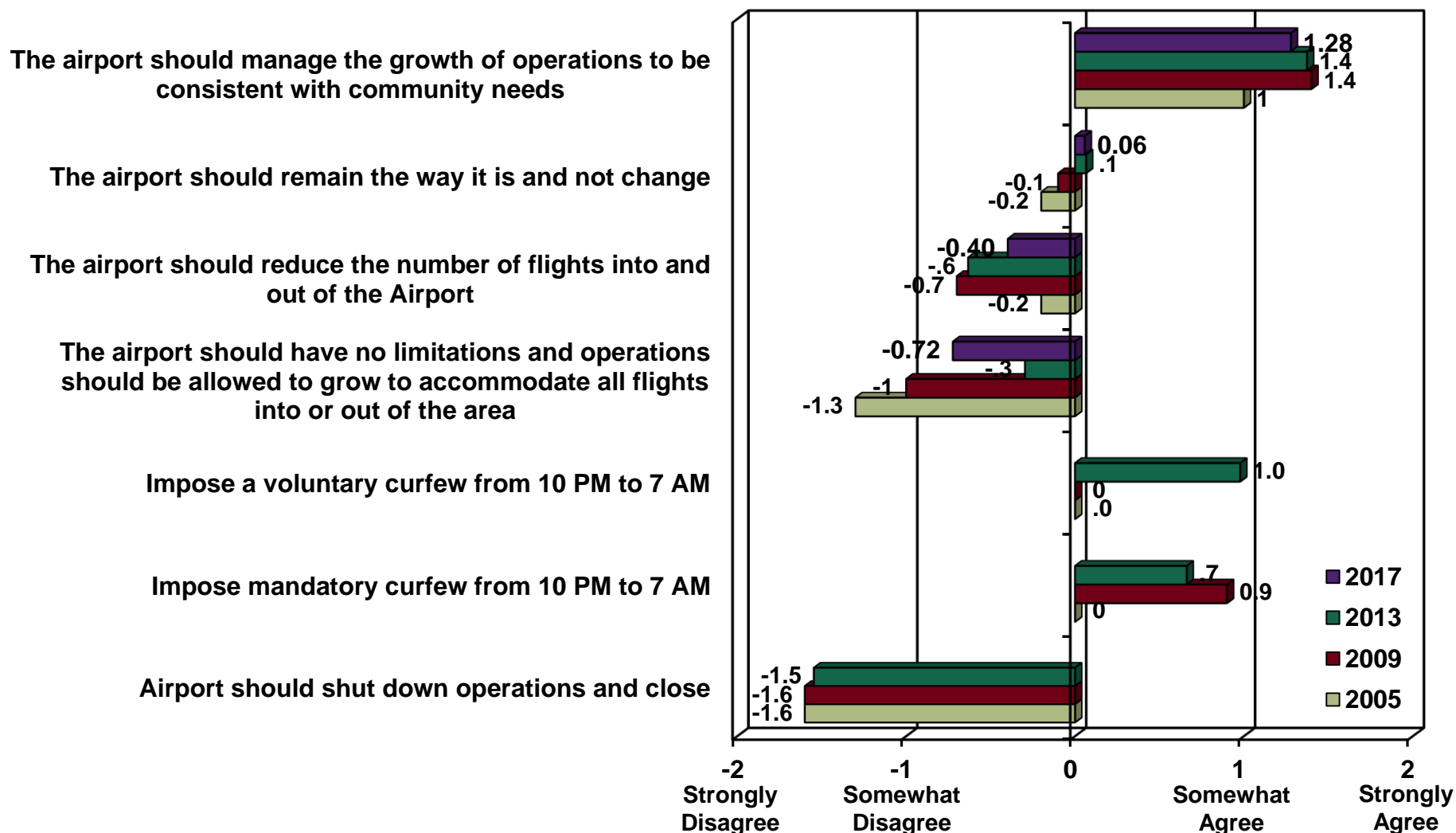
Q8. Airport's Role in the Community

Pilots

	2017	2013	2009	2005
The airport is an important component of the area's economy	1.71	1.7	1.8	1.9
The airport is enabling growth and development in the Truckee-North Lake Tahoe area	1.22	1.2	1.2	1.3
The airport should grow to address increasing demands from the community	0.89	1.2	1.4	1.4
The Airport District limits development by acquiring surrounding land and preserving it as open space	0.63	0.4	1	0.6
There is little the airport can do to minimize noise and low-flying aircraft since the FAA regulates planes once off the ground	0.18	0.2	-0.1	0
There is a lot the airport can do to minimize noise and low-flying aircraft such as policies and restrictions imposed on pilots	-0.05	0.2	-0.2	0.2
The airport is damaging the small-town character of Truckee and the surrounding area	-1.48	-1.8	-1.9	-1.7
The airport should reduce operations and scale back its programs and capabilities	-1.58	-1.7	-1.9	-1.8
Newer jet aircraft are quieter than older jets and some propeller planes	-	1.5	1.5	1.7
Newer jet aircraft are louder and larger than are older aircraft	-	-1.4	-1.7	-1.7

Q9. Vision of the Airport

Residents



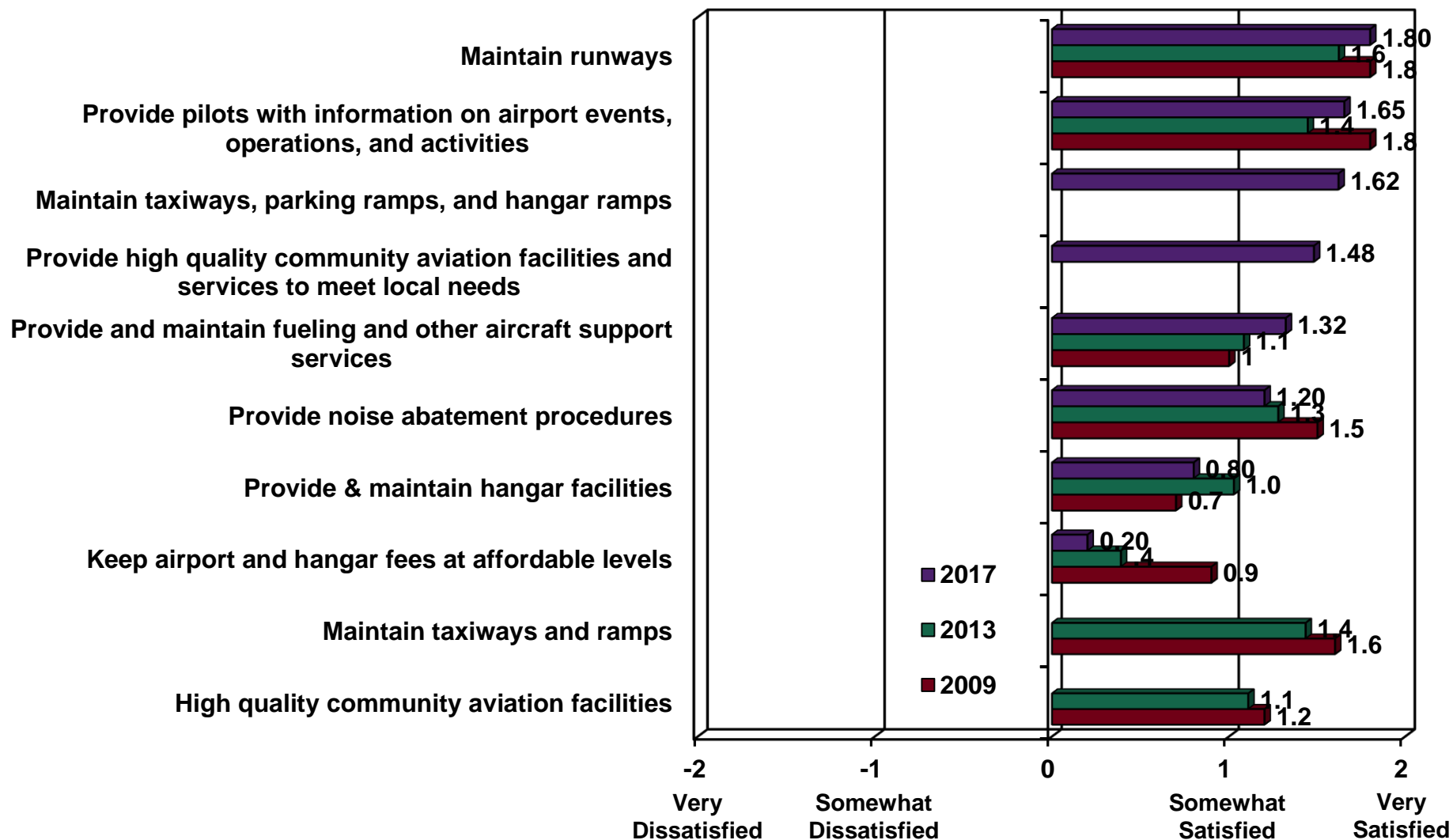
Q9. Vision of the Airport

Pilots

	2017	2013	2009	2005
The airport should manage the growth of operations to be consistent with community needs	0.88	1.3	0.9	0.9
The airport should have no limitations and operations should be allowed to grow to accommodate all flights into or out of the area	0.32	0.7	0.7	0.8
The airport should remain the way it is and not change	-0.01	-0.3	0.1	-0.3
The airport should reduce the number of flights into and out of the Airport	-1.60	-1.7	-1.8	-1.9
The airport should impose a voluntary curfew on take-offs and landings from 10 PM to 7 AM that does not apply to emergencies	-	0.1	NA	NA
The airport should impose a mandatory curfew on take-offs and landings from 10 PM to 7 AM that does not apply to emergencies	-	-0.8	-0.9	NA
The airport should shut down operations and close	-	-1.9	-1.9	-2

Q10. Satisfaction with Airport Activities

Pilots



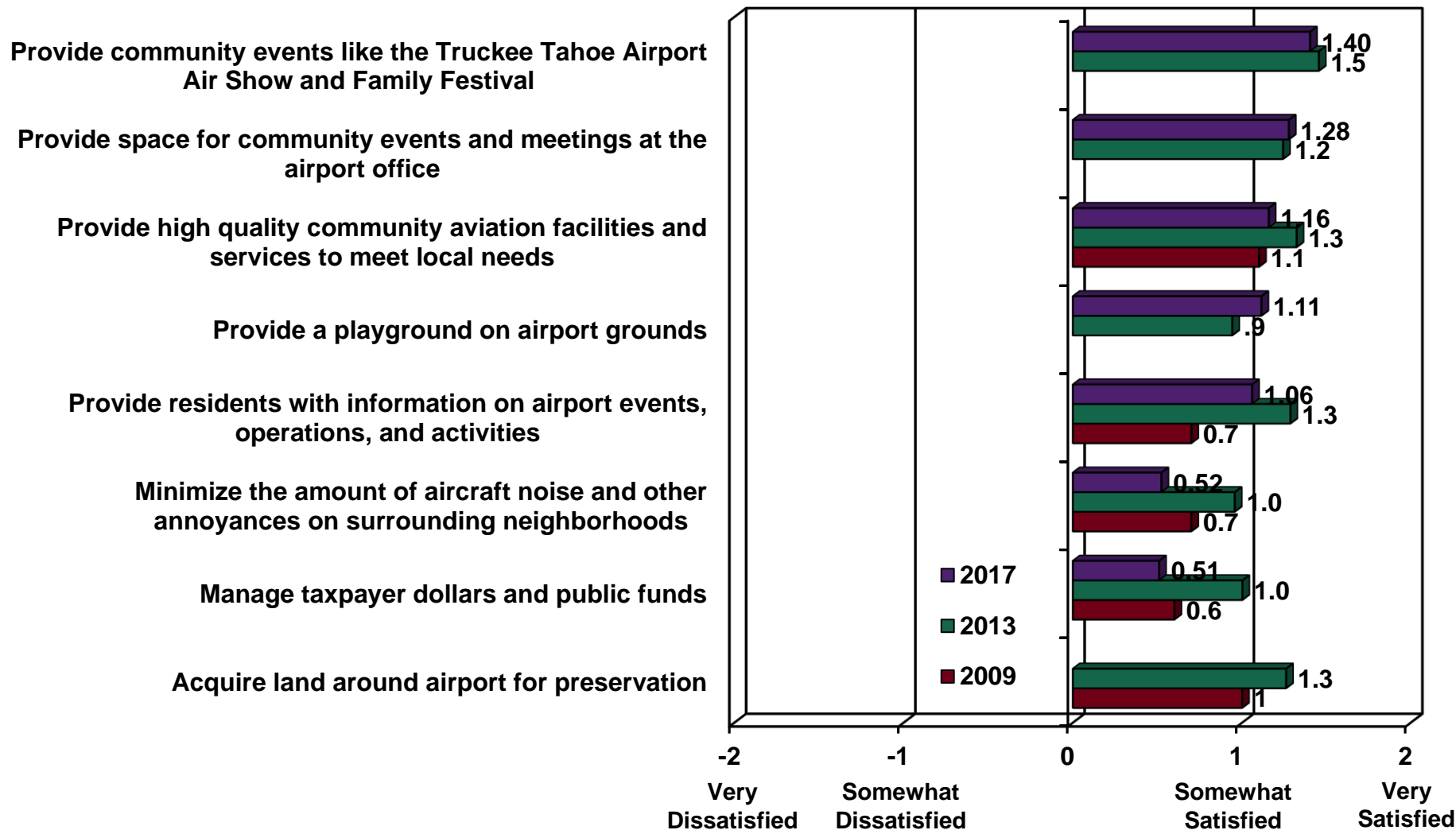
Q11. Most Important Improvement Pilots

	2017	2013
Hangar access/Box hangars	17.6%	-
Competitive fuel prices	15.7%	-
Permanent tower	15.7%	-
Has good leadership/Management/Staff	7.8%	-
Affordable/Hangar fees/Landing fees	7.8%	-
Deicing services	5.9%	14%
Use aviation money for aviation purposes	5.9%	-
Washing facilities	3.9%	-
Heated hangars	3.9%	-
Reduce staff	3.9%	-
More hangars	-	19%
Better fueling capability	-	14%
Less noise abatement	-	8%
Better instruments	-	8%
Asphalt maintenance	-	5%
Less restrictions of operation	-	5%
Light plane friendly	-	5%
Safety for pilot	-	5%
Change of managment	-	5%
Lengthen the runway	-	3%
None/Nothing	5.9%	8%
Other mentions	27.9%	16%
DK/NA	2.0%	11%

Note: Issues that were mentioned by less than 3 percent of the residents have been added to the "Other mentions" category for charting purposes. For the detailed results of this question, please see the Topline report.

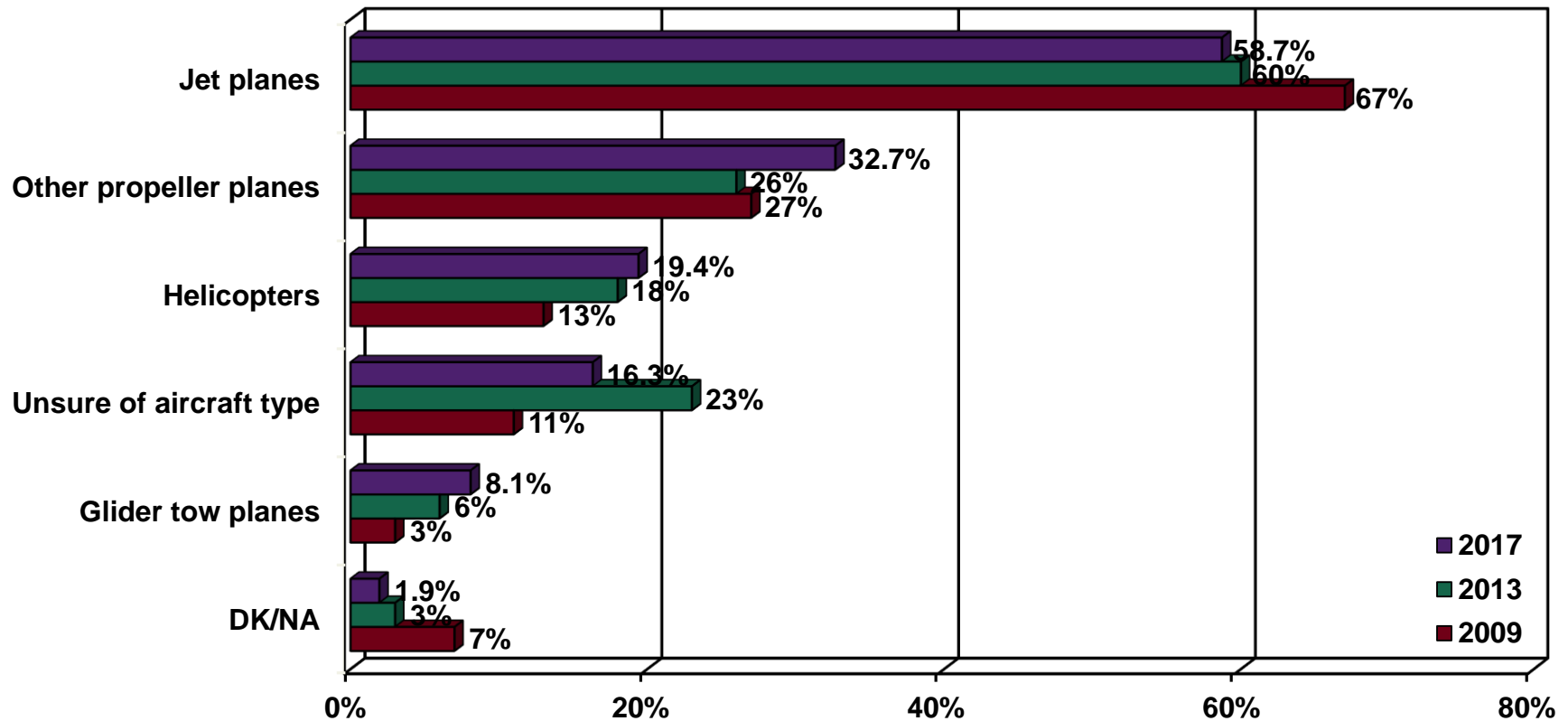
Q12. Satisfaction with Airport Activities

Residents



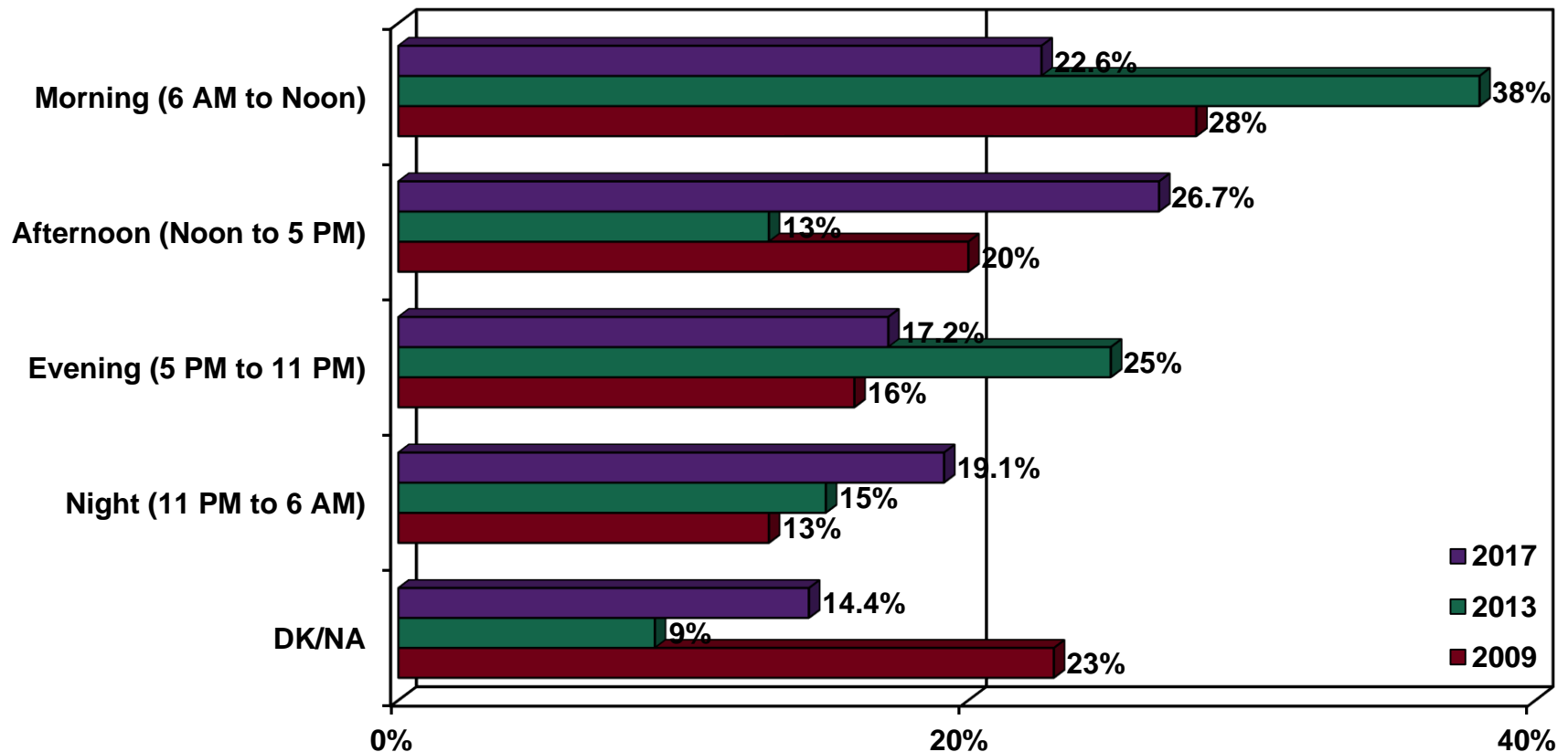
Q13. Aircraft Responsible for Dissatisfaction

Residents



Q14. Time of Day when Dissatisfied

Residents





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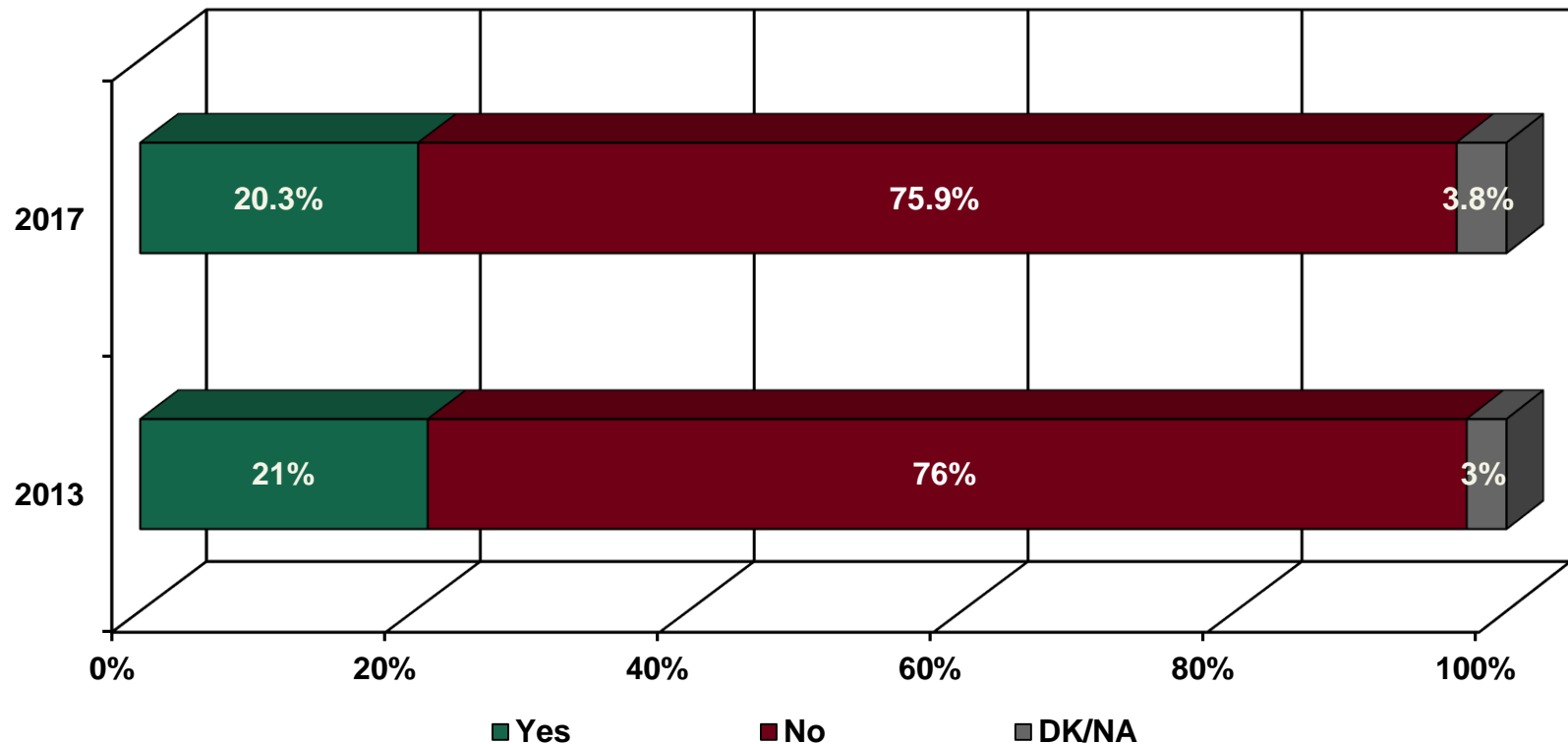


Communications

Q15. Awareness of Purchase of Tahoe City Golf Course

Residents

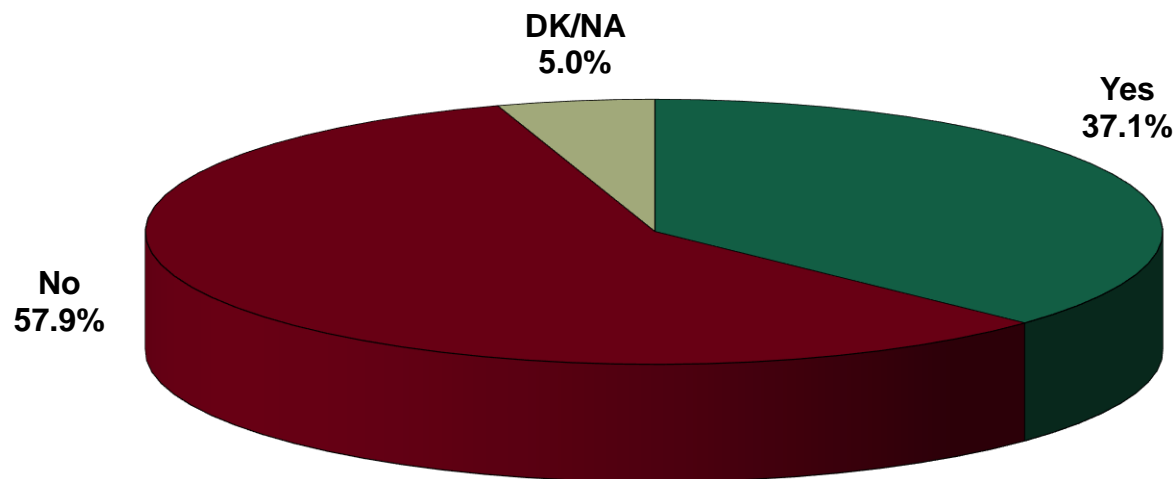
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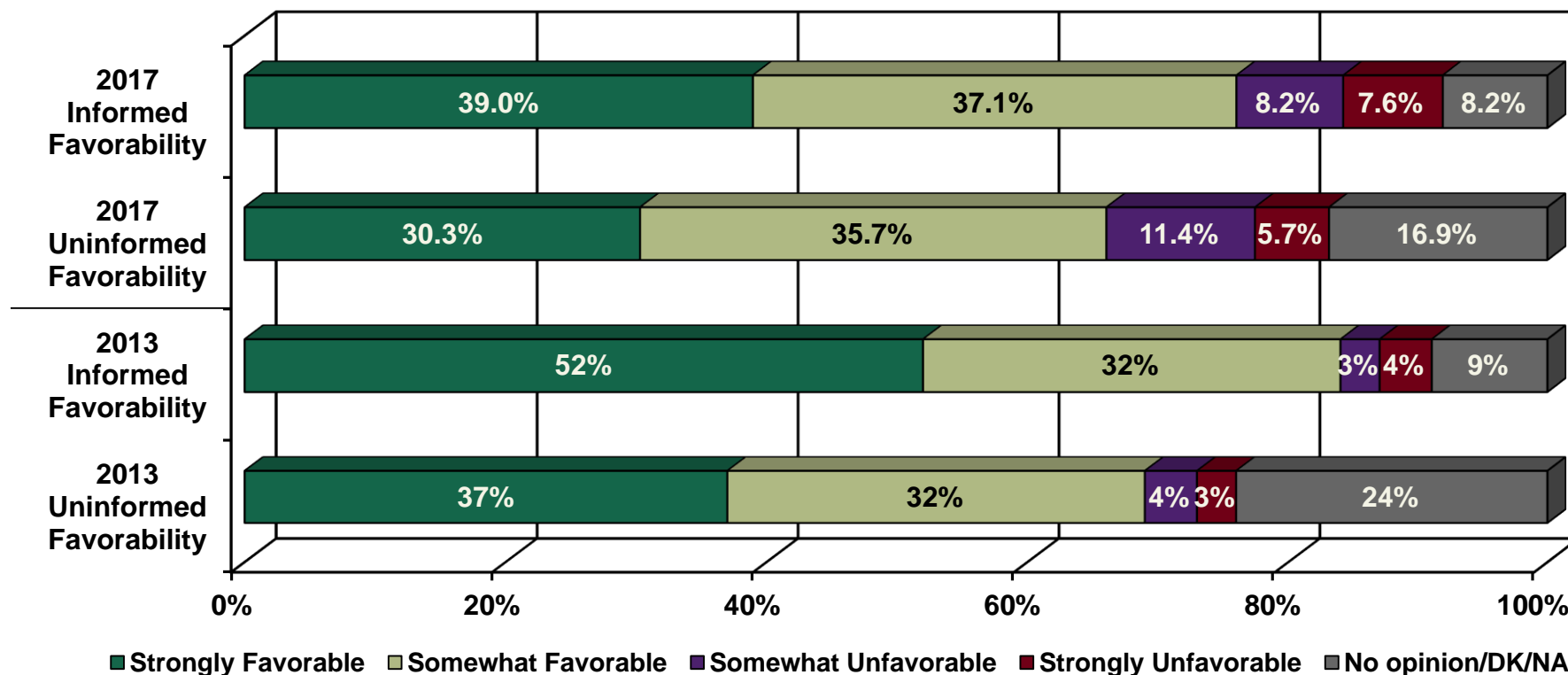
Q16. Awareness of Pilot Voluntary Curfew Incentives Before Survey

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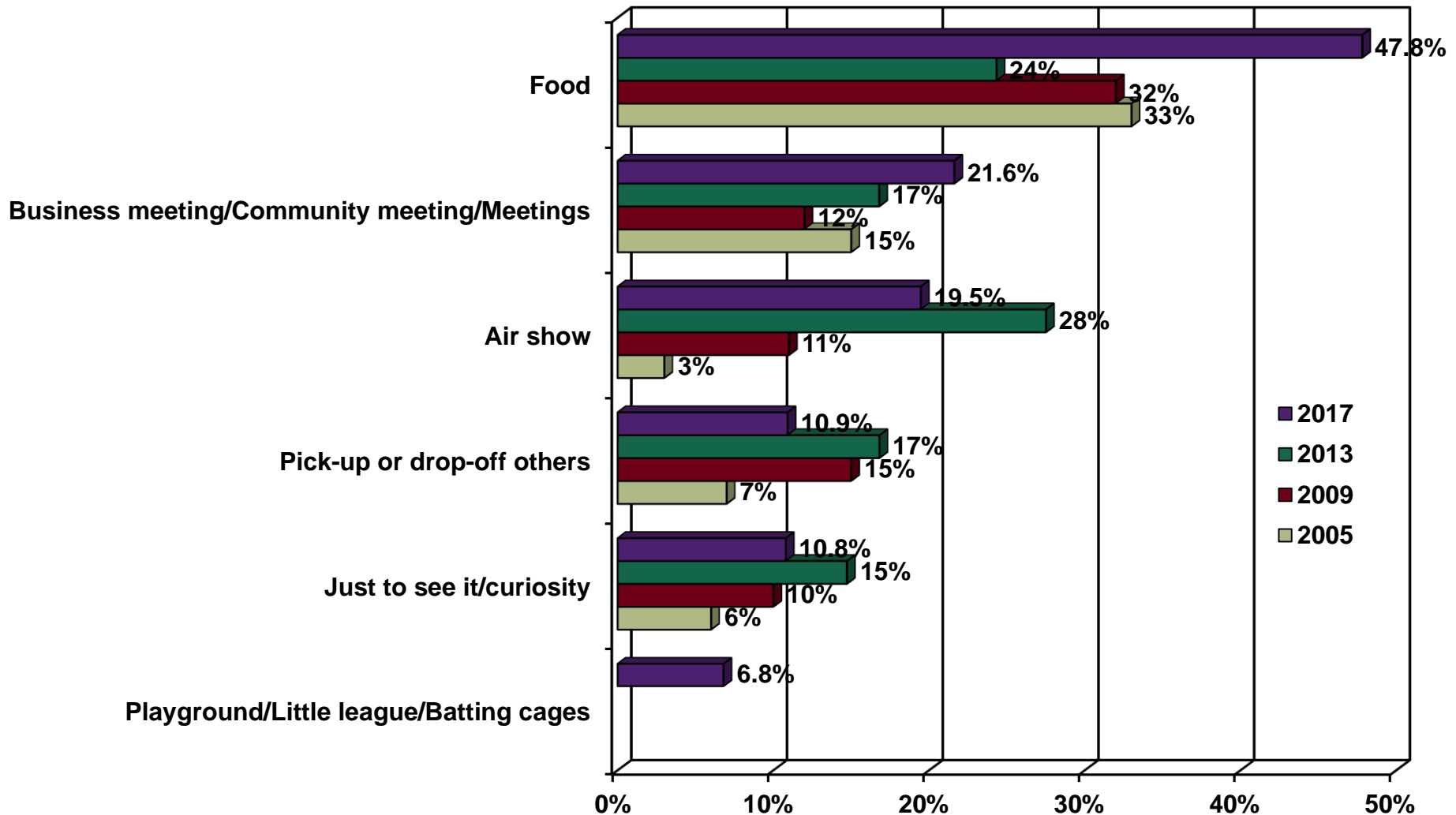
Q17. Informed Favorability of the Airport Residents



Q21. Reasons for Non-Aviation Visits

Residents

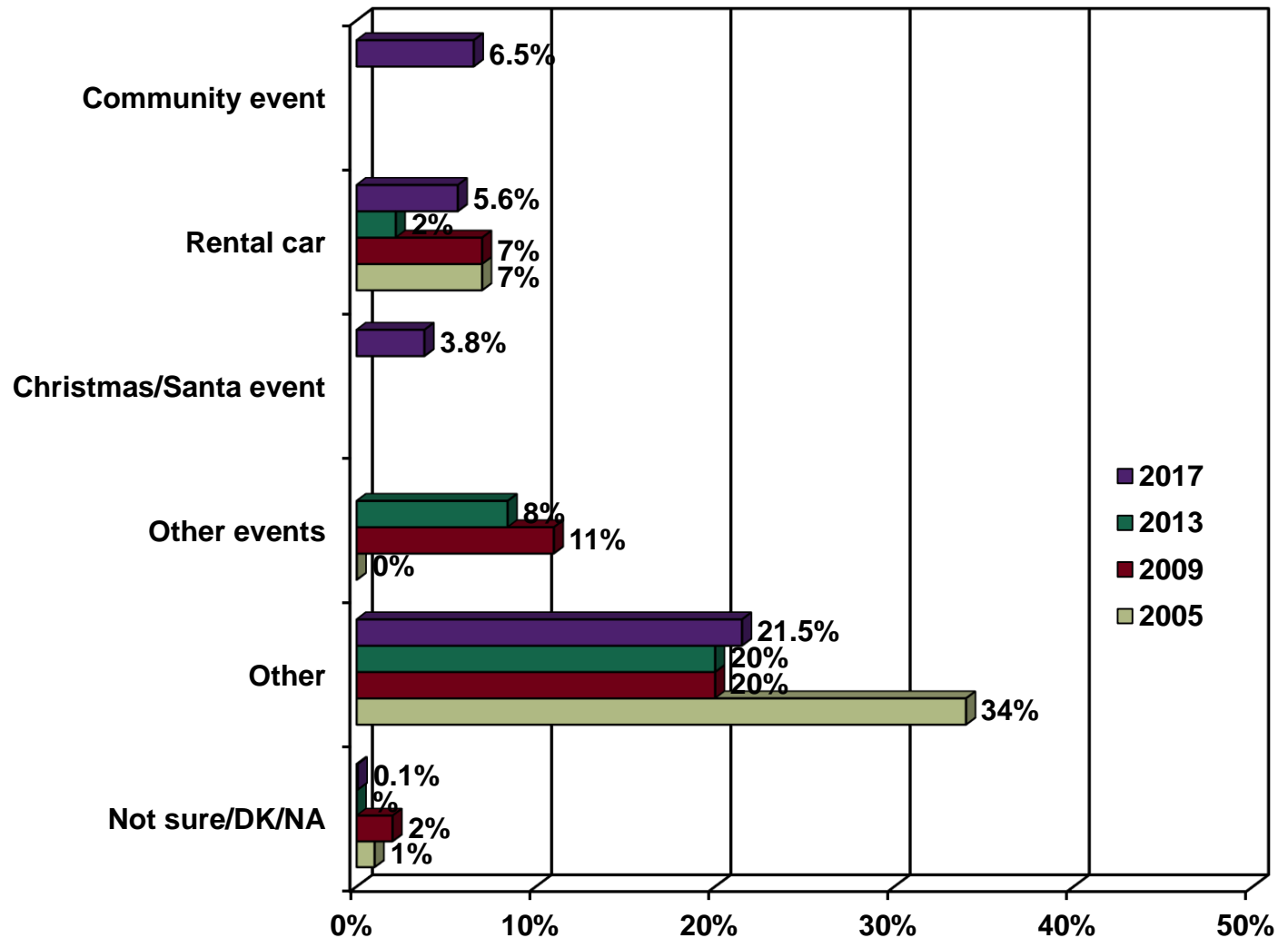
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Q21. Reasons for Non-Aviation Visits

Residents

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