

GO LOCAL STUDY: Evaluation of Transit Connections to John Wayne Airport

Joint City Council Meeting
Newport Beach and Costa Mesa

September 30, 2008

Cities' Goals

Go Local Scope: Evaluate a transit link into JWA.

- Evaluate planned OCTA transit services
 - Metrolink Expansion
 - I Shuttle
 - Bus Rapid Transit
- Review previous rail studies into JWA
- Compare transit connections from Irvine or Tustin Metrolink stations into JWA

Orange County Future Aviation Demand: Critically analyze a regional approach to airport service.

Evaluation Process

- Gather Market Data with Passenger Survey
- Analyze & Understand Market Data
- Evaluate Airport Transit Services
- Market Airport Transit Services to Traveler

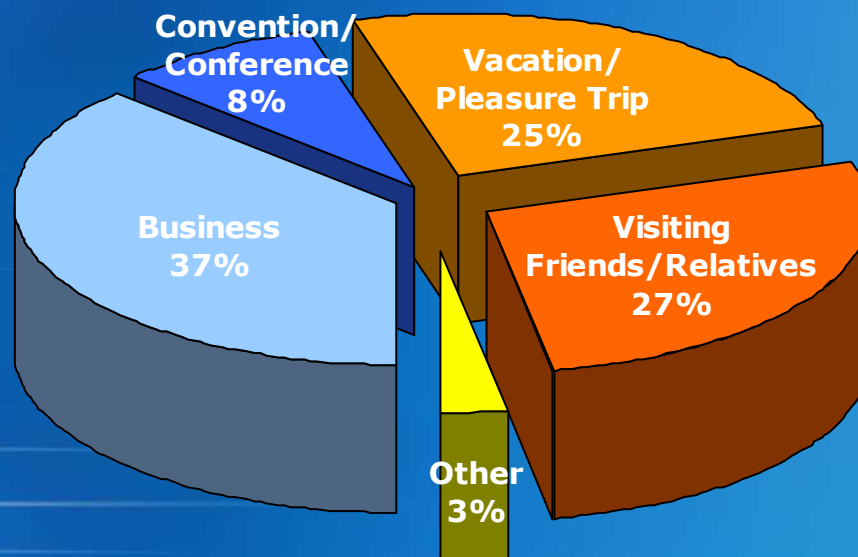
JWA Air Passenger & Employee Market



Primary Trip Purpose

- Dominant Passenger Segment - Leisure Travelers (55%)
 - Over half are visiting friends and family
- 45% are Business Travelers
- High median household income of \$100,000-\$125,000

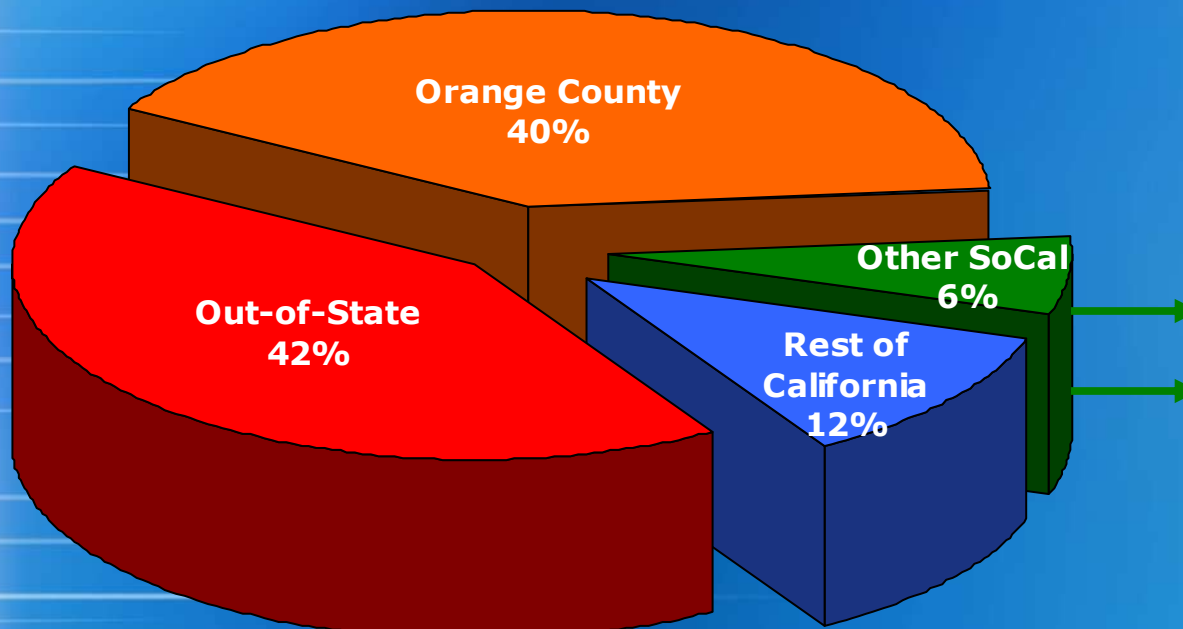
JWA Trip Purpose:



Resident – Visitor Mix

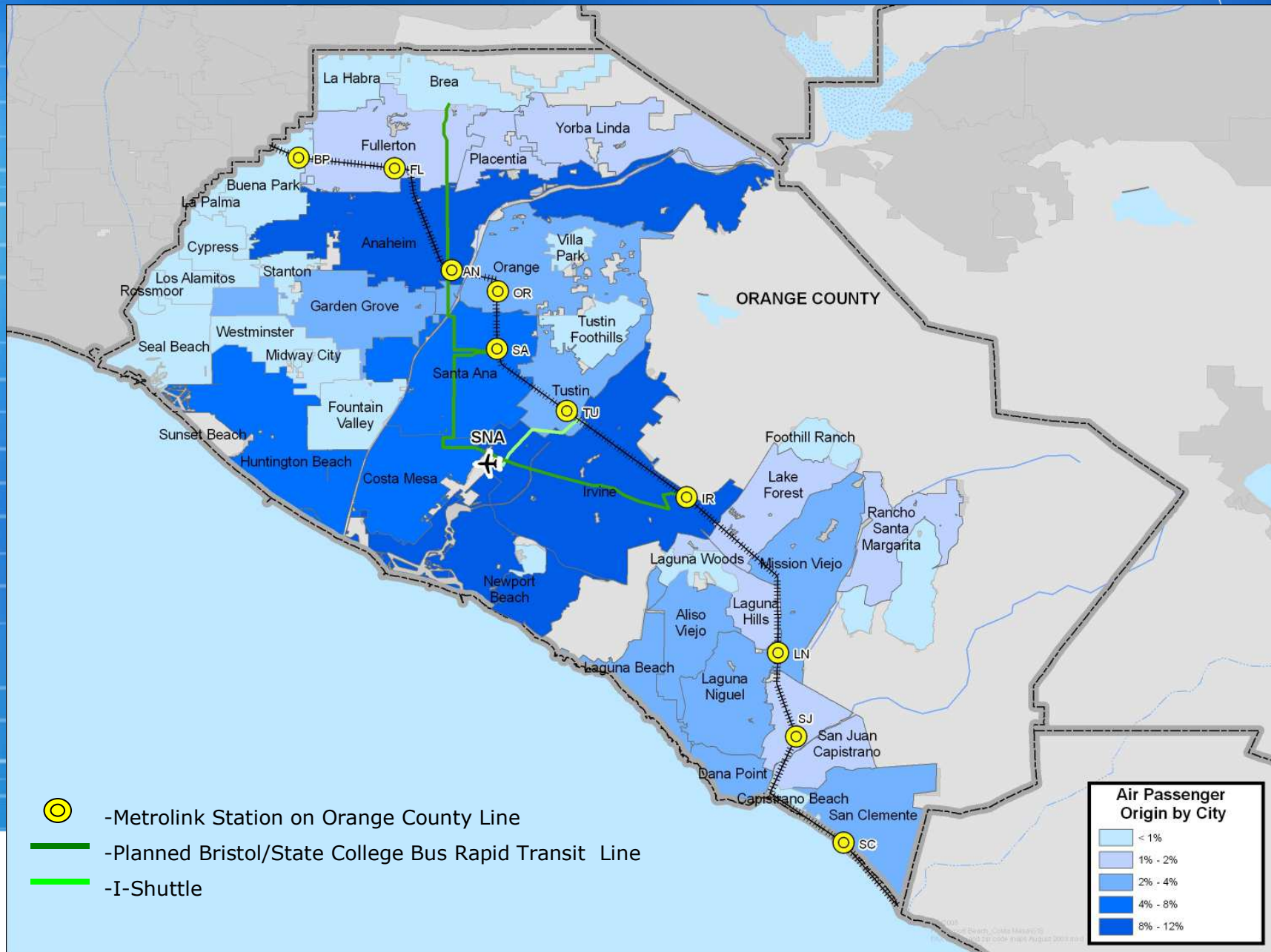
- 40% of JWA passengers are Orange County residents
- 6% are from adjacent counties
- 56% are visitors.

Passengers Primary Residence:

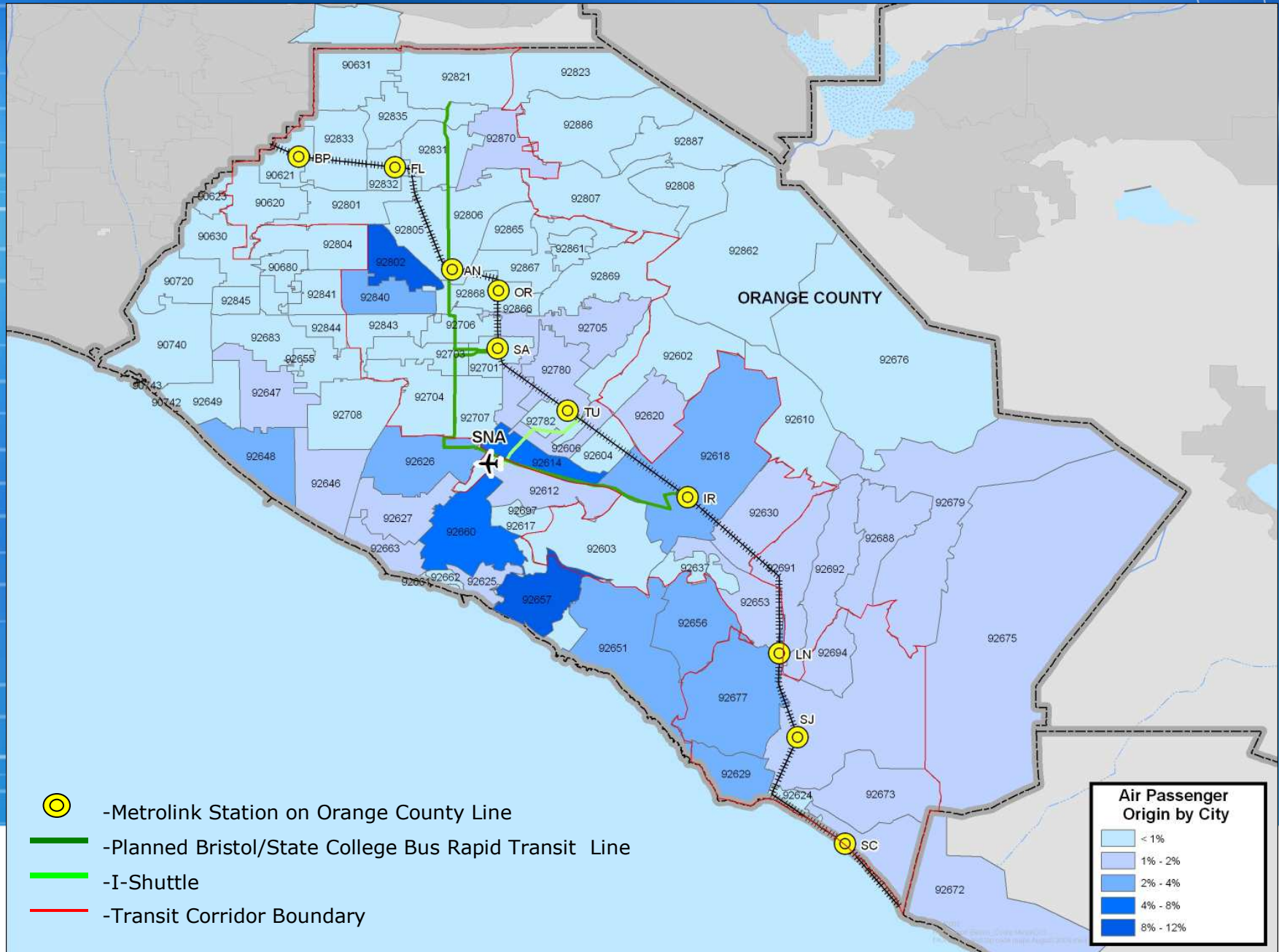


COUNTY City	% Share
LOS ANGELES	3.0%
Long Beach	1.0%
Los Angeles	0.3%
Lakewood	0.2%
RIVERSIDE	1.8%
Corona	0.5%
Murrieta	0.3%
Riverside	0.3%
SAN BERNARDINO	0.7%
SAN DIEGO	0.7%
TOTAL	6.2%

Passenger Trip Origins by City



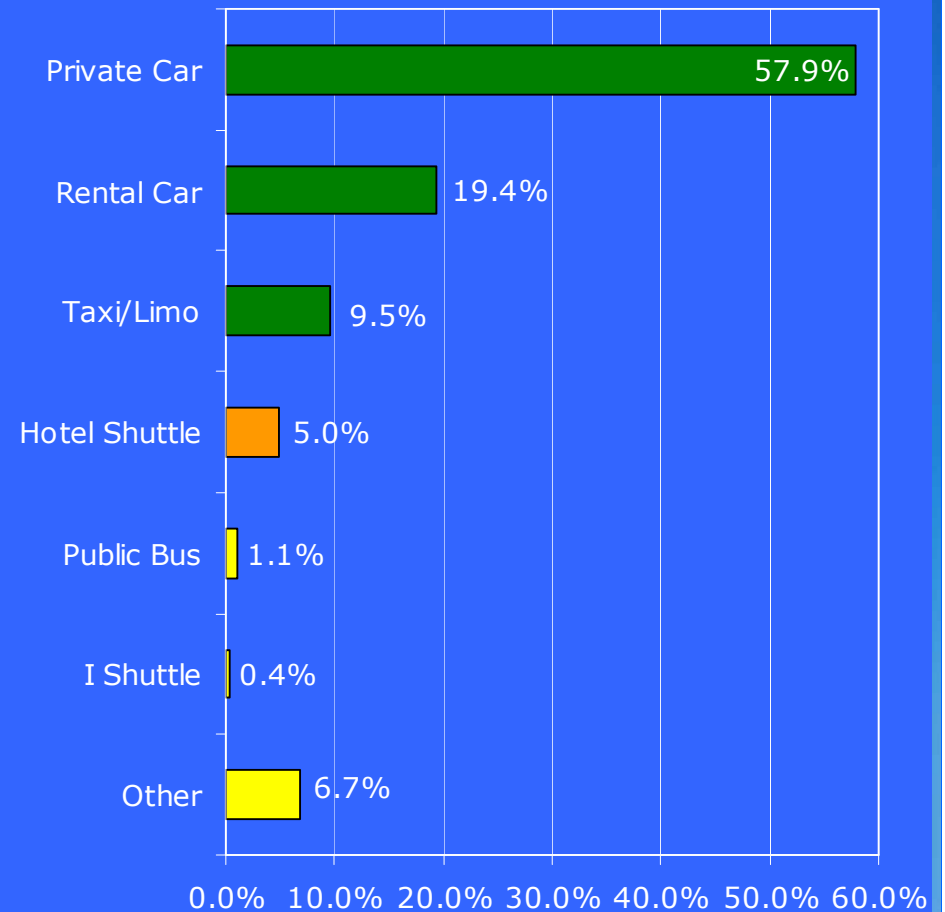
Passenger Trip Origins by Zip Code



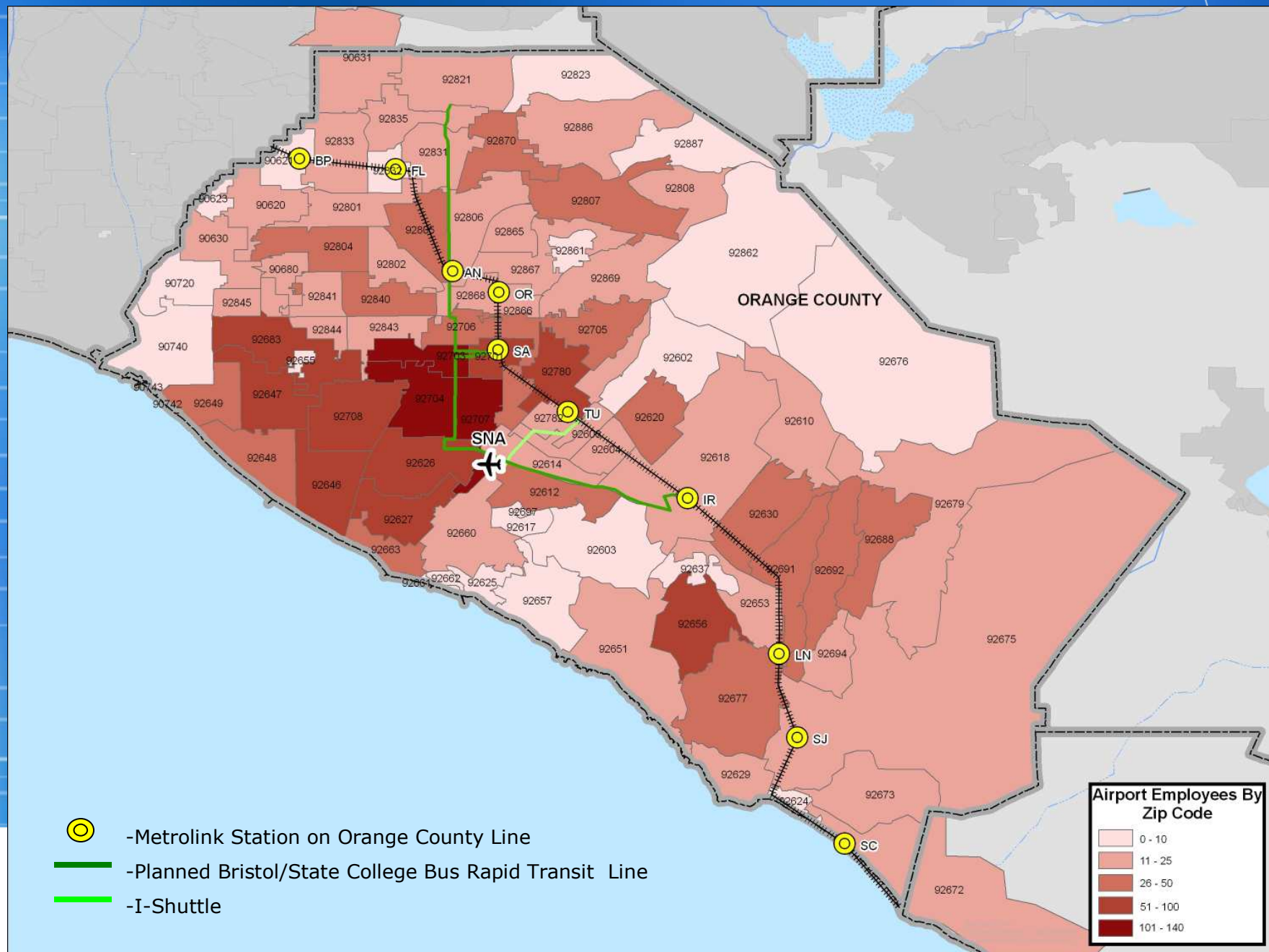
Ground Transportation Mode

- Private car (58%) is the primary access mode:
 - 40% are dropped off, (2x the vehicle trips)
 - 18% "Drive & Park" at JWA
- 85 percent of residents travel to JWA in private cars.
- Visitor business travelers rely primarily on rental cars
- Passengers visiting friends and family are mostly dropped off
- "Drive & Park" tend to be higher income business travelers

Ground Transportation Mode to JWA:



JWA Employees by Zip Code



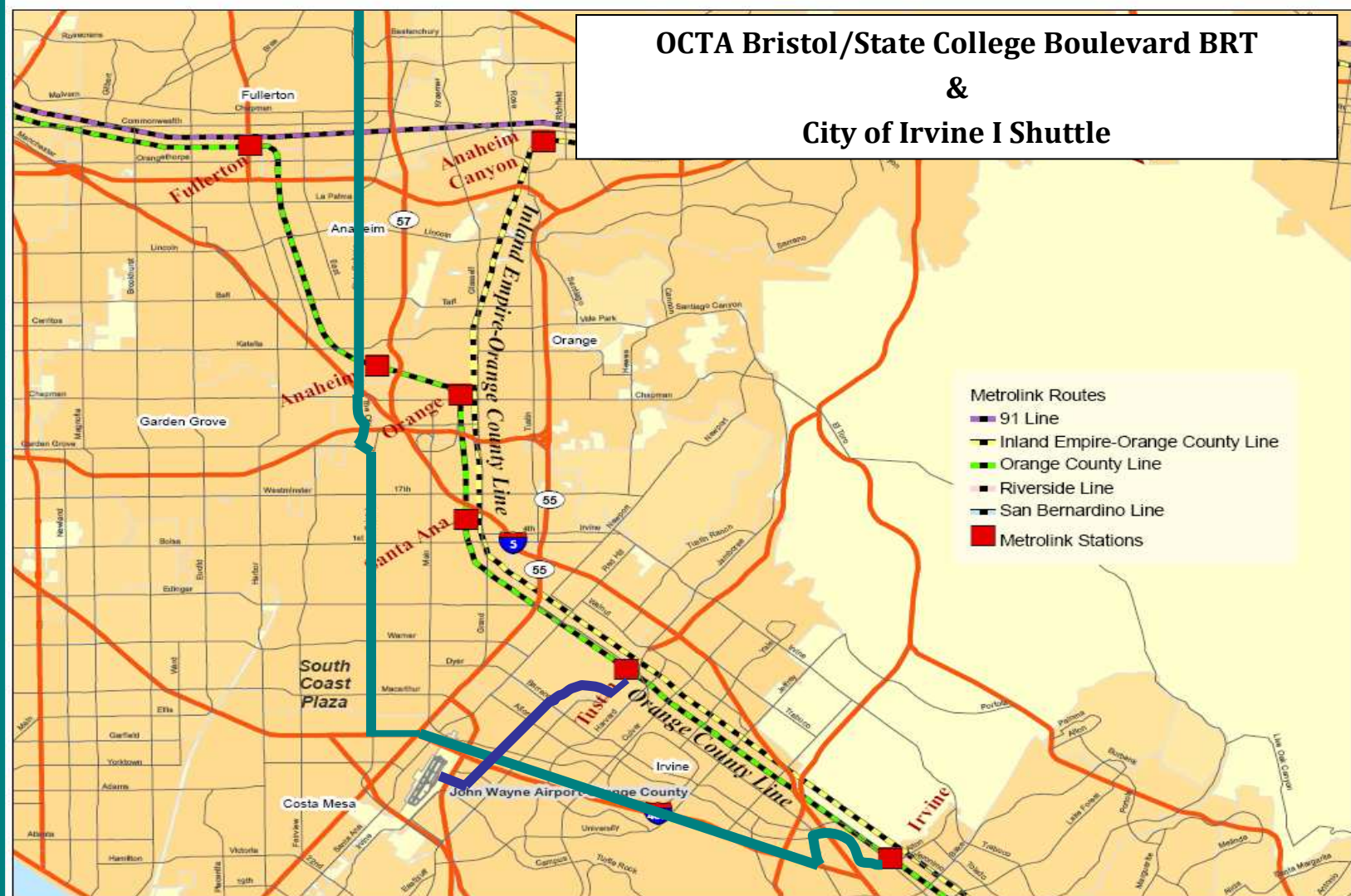
Transit Ridership Potential



Transit Evaluation Framework

- Components:
 - Extension of Metrolink Orange County Line into JWA
 - I Shuttle Extension
 - Rail Extension
 - OCTA Bus Rapid Transit Services (“BRAVO”)
 - Direct services to targeted high density clusters
- Evaluation Criteria:
 - Geographic Eligibility
 - Demographic Segmentation
 - Revealed transit preference

BRT Route Map

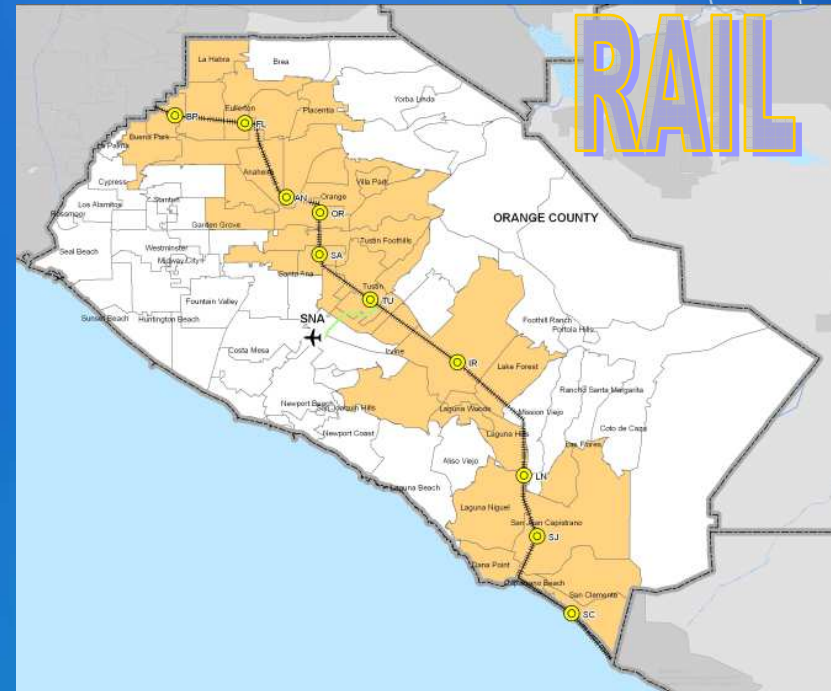
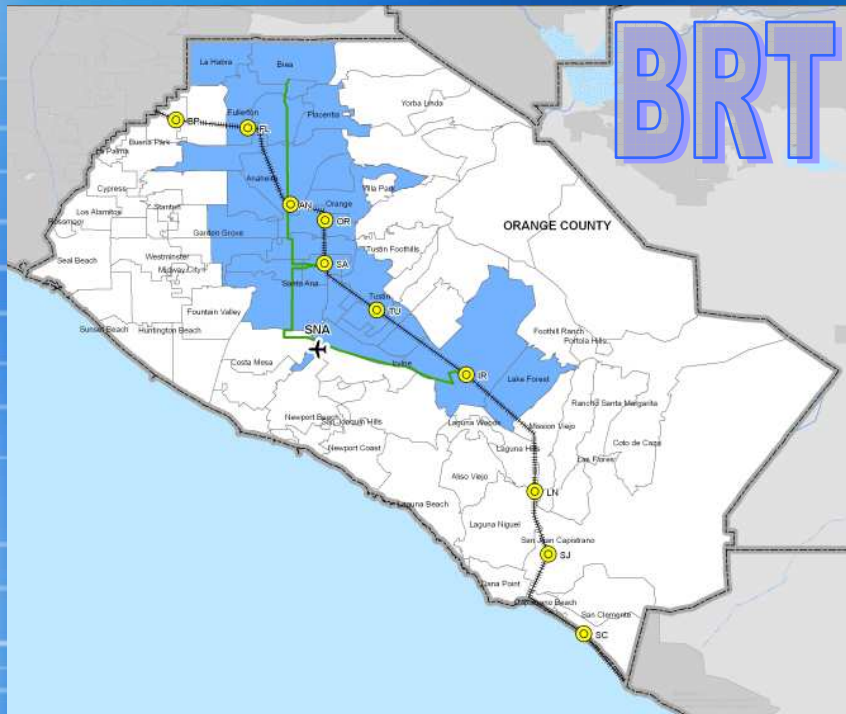


OCTA Bristol/State College Boulevard BRT

City of Irvine I Shuttle

Geographic Market for Transit

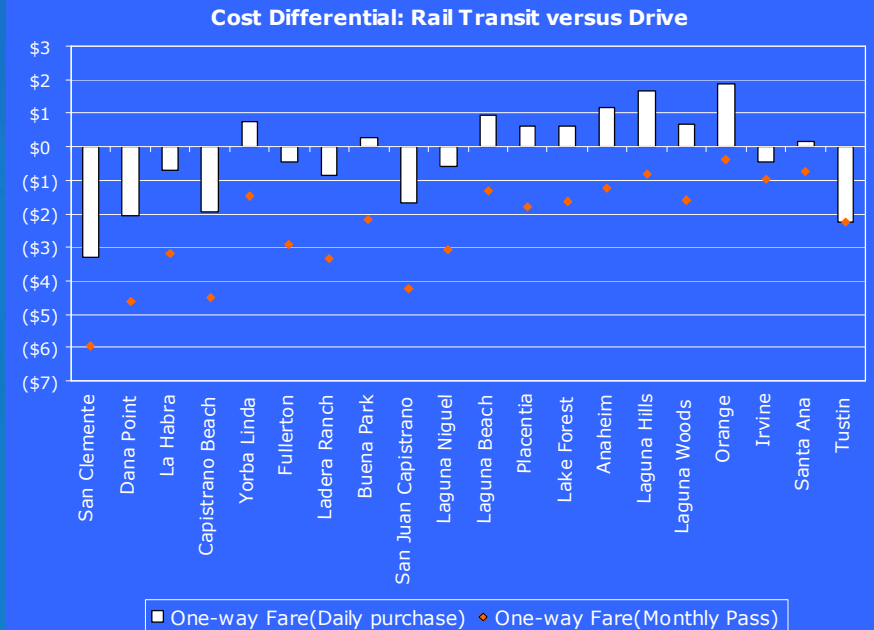
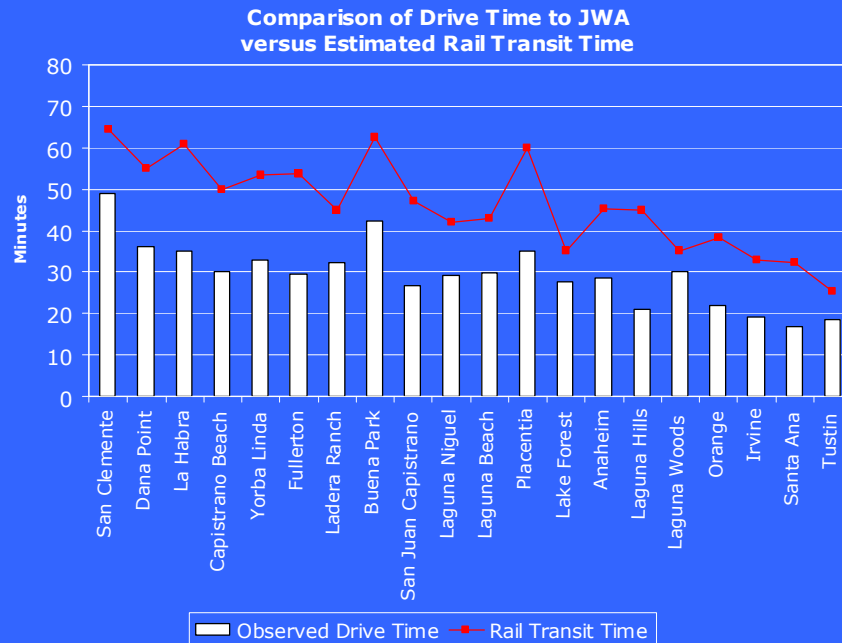
- Metrolink serves 48% of passenger base and 43% of JWA employees
- Provides potential to attract South County air passengers



- Passenger coverage in BRT market is diminished (30%)
- 40% of employees still served with planned BRT route
- BRT market contains higher share of visitor-business and visitor-leisure base

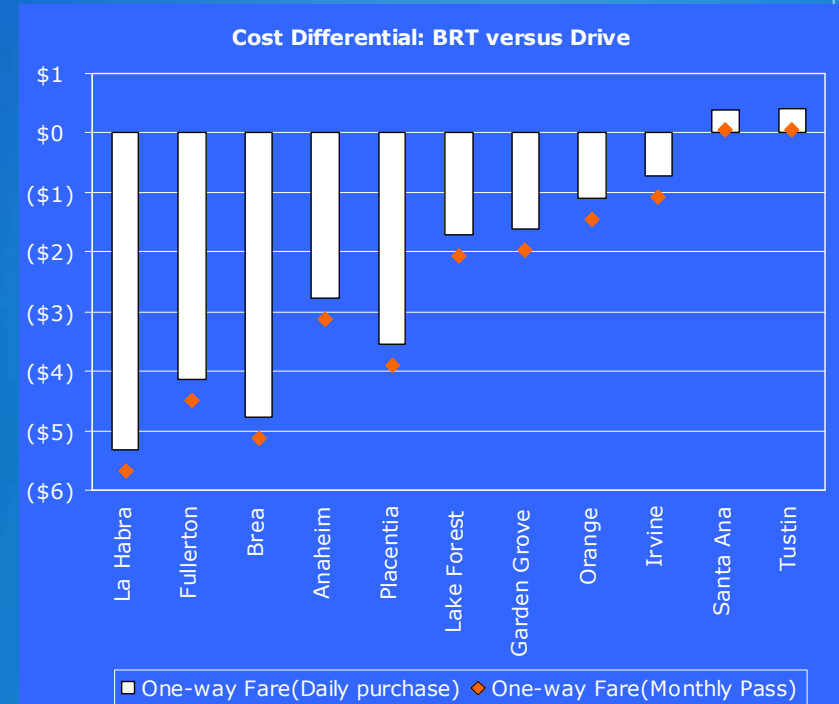
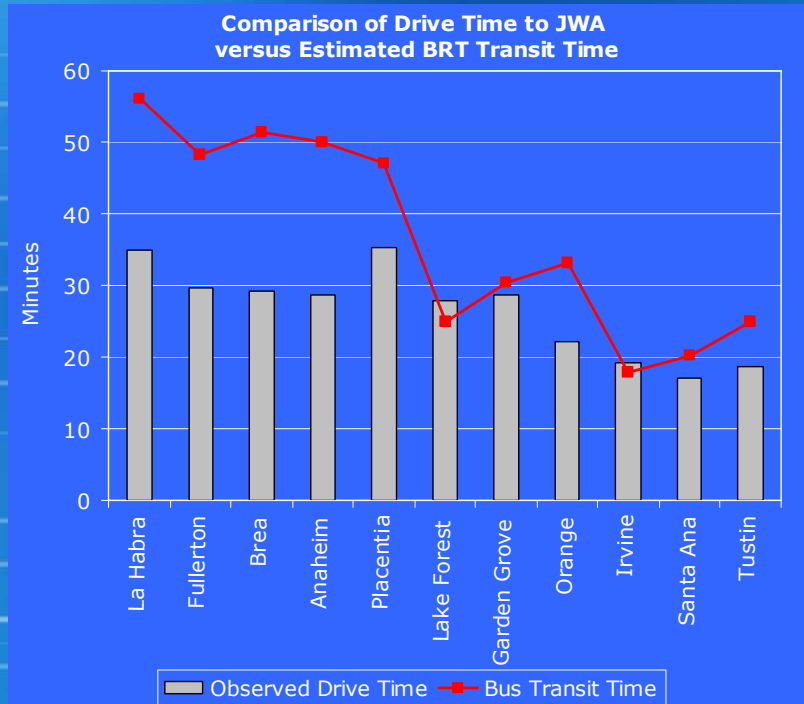
Rail Transit—Time/Cost Evaluation

- Estimated trip time incorporating rail transit is approximately 60% greater than driving.
- Current Metrolink pricing structure provides limited cost savings to air passengers when combined with other trip costs
- Closer in cities provide most reasonable extended transit times but more distant cities provide greatest potential cost saving



BRT—Time/Cost Evaluation

- Estimated trip time using bus transit is approximately 40% greater than driving.
- Current OCTA pricing structure provides greater cost savings to air passengers over rail transit.
- Employees have greater frequency of use and will derive greater financial benefits.



Rail Ridership Potential

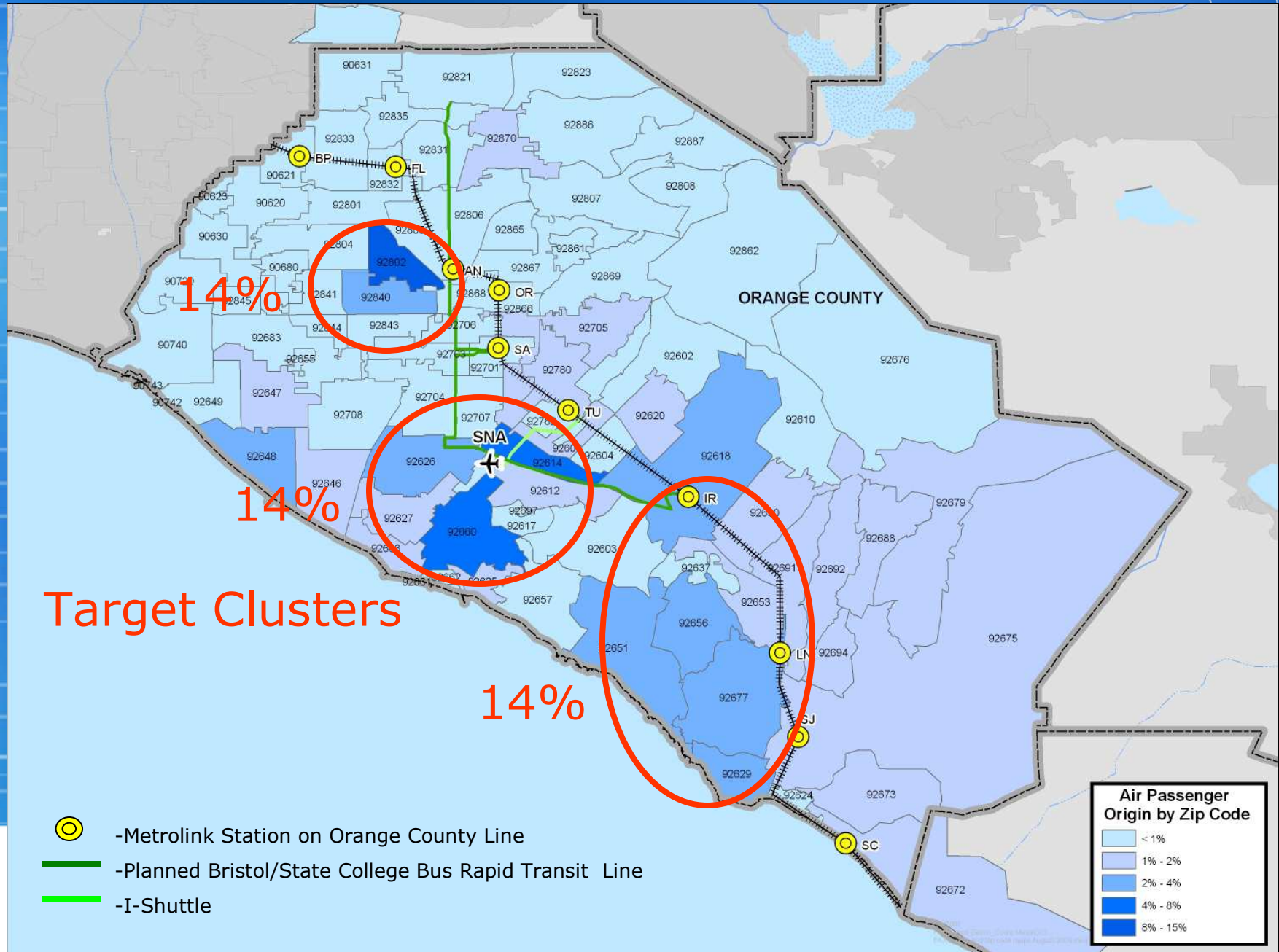
- Passenger pool derived from geographic market area, demographic market, and stated preference for use of transit options.
- Passenger ridership range estimated between 500 and 2,000 passengers per day
- A range of 2-5% growing to as much as 10% was used to generate low and high ridership levels for employees.

	PAX	<u>10.0 MAP</u> Employees	Total	PAX	<u>10.8 MAP</u> Employees	Total
Daily Ridership						
Low Case	450	40	490	490	80	570
Base Case	1,220	100	1,320	1,310	190	1,500
High Case	1,820	240	2,060	1,960	480	2,440
% of Total Base						
Low Case	1.6%	0.8%	1.5%	1.8%	1.6%	1.8%
Base Case	4.5%	2.0%	4.1%	4.8%	4.0%	4.7%
High Case	6.6%	5.0%	6.4%	7.2%	10.0%	7.6%

Targeted High Density Clusters



Passenger Trip Origins by Zip Code



Target Air Passengers

- Target clusters account for 42% of JWA passengers
- Anaheim- Garden Grove Resort
 - Visitors(95%) – Vacation and Convention Travelers(74%)
- John Wayne Airport – South Coast Metro
 - Visitors (67%)
 - Vacation and Convention Travelers(24%)
 - Business Travelers from Local Hotels(37%)
- South Orange County
 - Resident Travelers(48%)
 - Metrolink Users

JWA-South Coast Metro

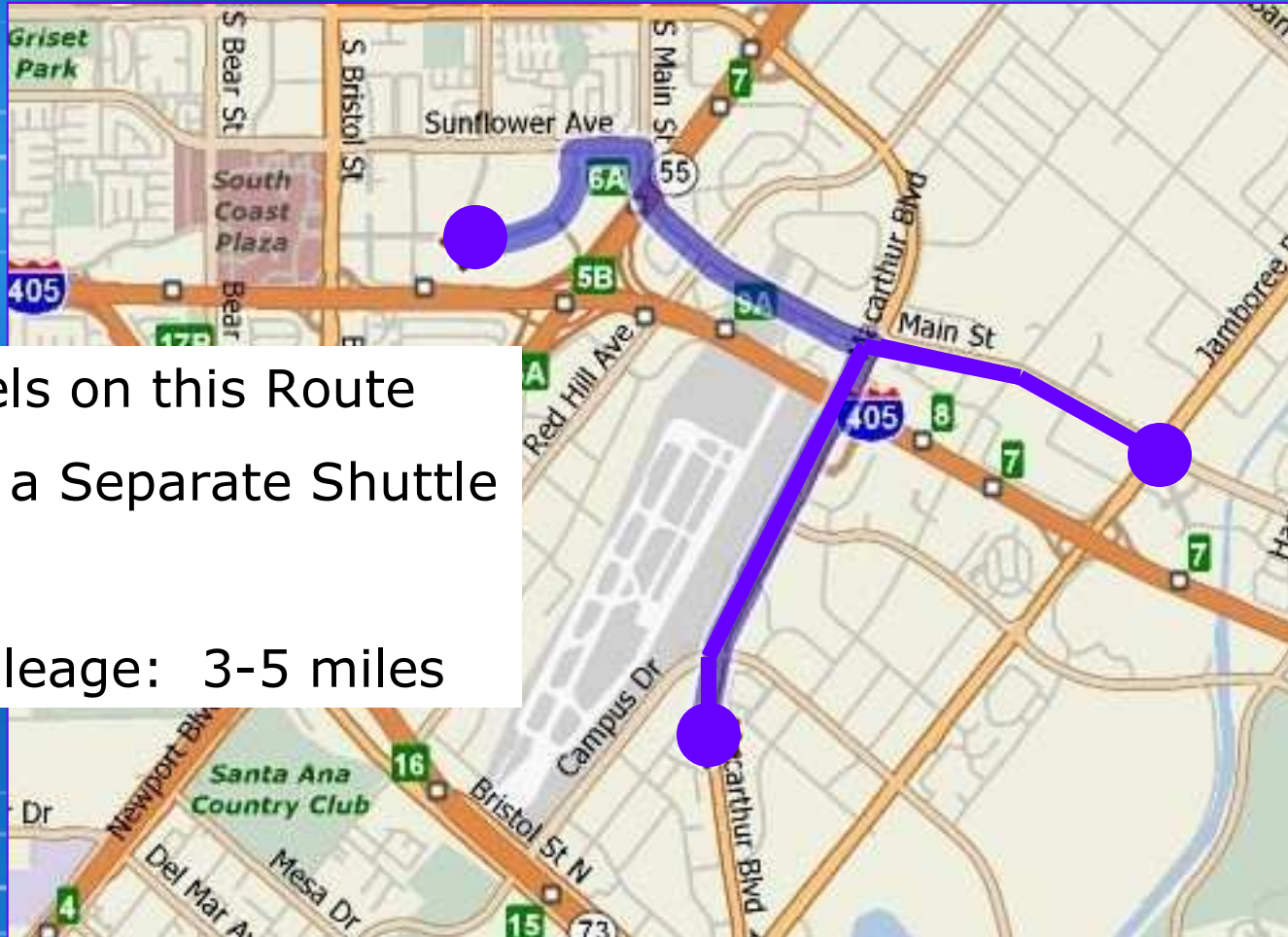
- 14% of JWA passenger traffic.
- Large visitor component
- Strong business base
- Highly dependent on hotels for lodging
- Majority travel in low occupancy vehicles



City	Zip	Visitors	Taxi, Limo, Shared Ride, Bus	Rental Car	Private Cars	Visitor Origin at Hotel
Costa Mesa	92626	66%	31%	29%	40%	61%
Irvine	92614	67%	28%	27%	45%	46%
Newport Beach	92660	68%	32%	24%	44%	71%

(80% are dropped off)

Hotel Shuttle Service



15 Hotels on this Route
Each Runs a Separate Shuttle

Route Mileage: 3-5 miles

South Orange County

- Mix of resident travelers and visiting vacationers
- Heavy reliance on private cars
- Focus on Resident Leisure Travelers
- Initial Marketing Target – Metrolink Users

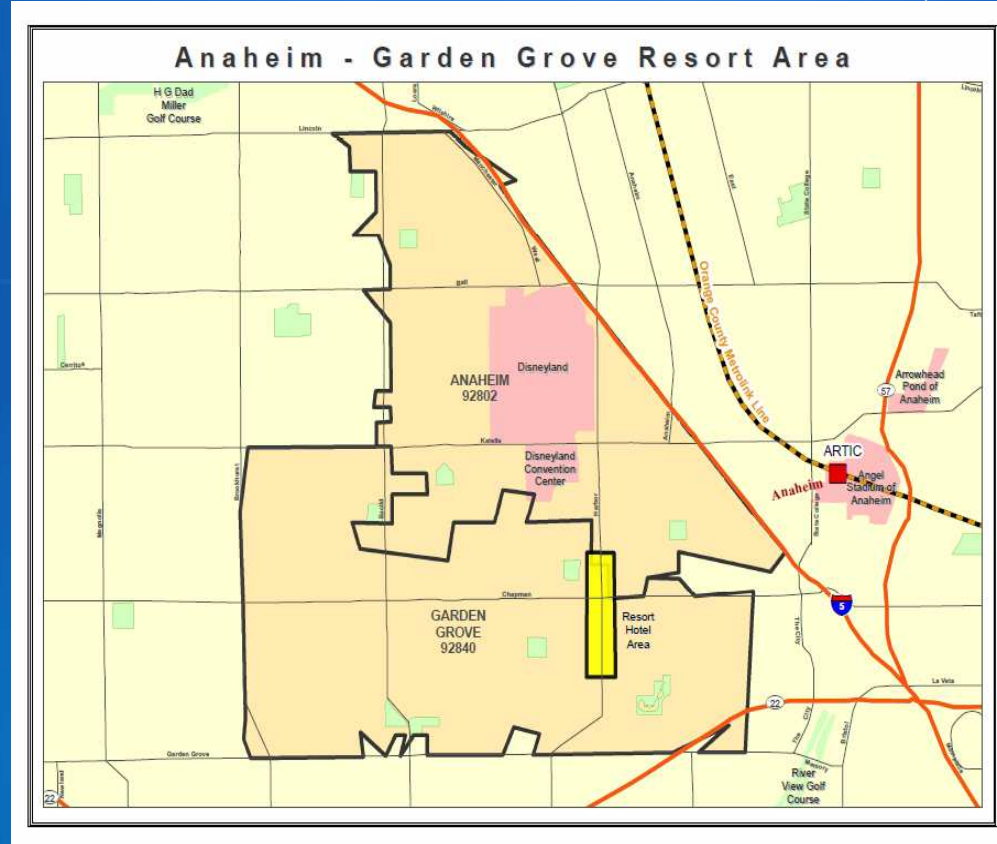


City	Zip	Visitors	Taxi, Limo, Shared Ride, Bus	Rental Car	Private Cars	Visitor Origin at Hotel
Aliso Viejo	92656	24%	11%	4%	85%	0%
Dana Point	92629	58%	18%	22%	60%	62%
Irvine	92618	66%	18%	38%	44%	36%
Laguna Beach	92651	79%	28%	33%	39%	74%
Laguna Niguel	92677	33%	8%	9%	83%	8%
San Juan Capistrano	92675	48%	14%	14%	72%	17%

(64% are dropped off)

Anaheim – Garden Grove Resort Area

- Visitors (95%)
 - Disneyland
 - Convention Center
- Limited use of rental & private cars
- High dependence on resort/hotel services



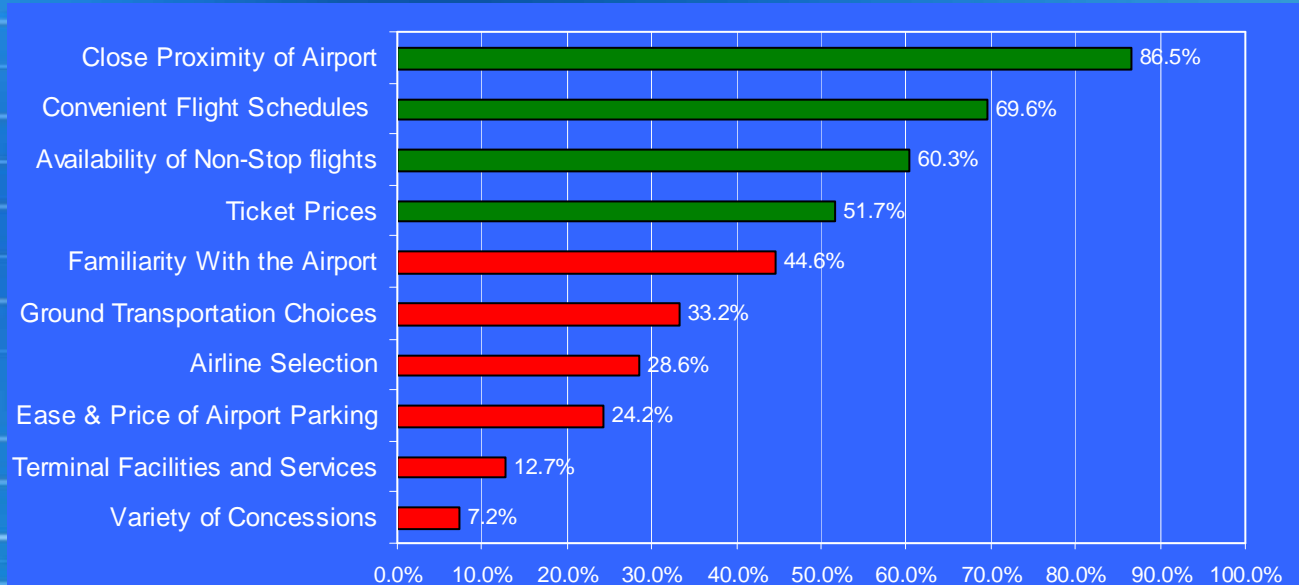
City	Zip	Visitors	Taxi, Limo, Shared Ride, Bus	Rental Car	Private Cars	Visitor Origin at Hotel
Anaheim	92802	97%	74%	22%	4%	94%
Garden Grove	92840	90%	56%	23%	21%	86%

Airport Choice Factors & Regionalization



Airport Choice Factors

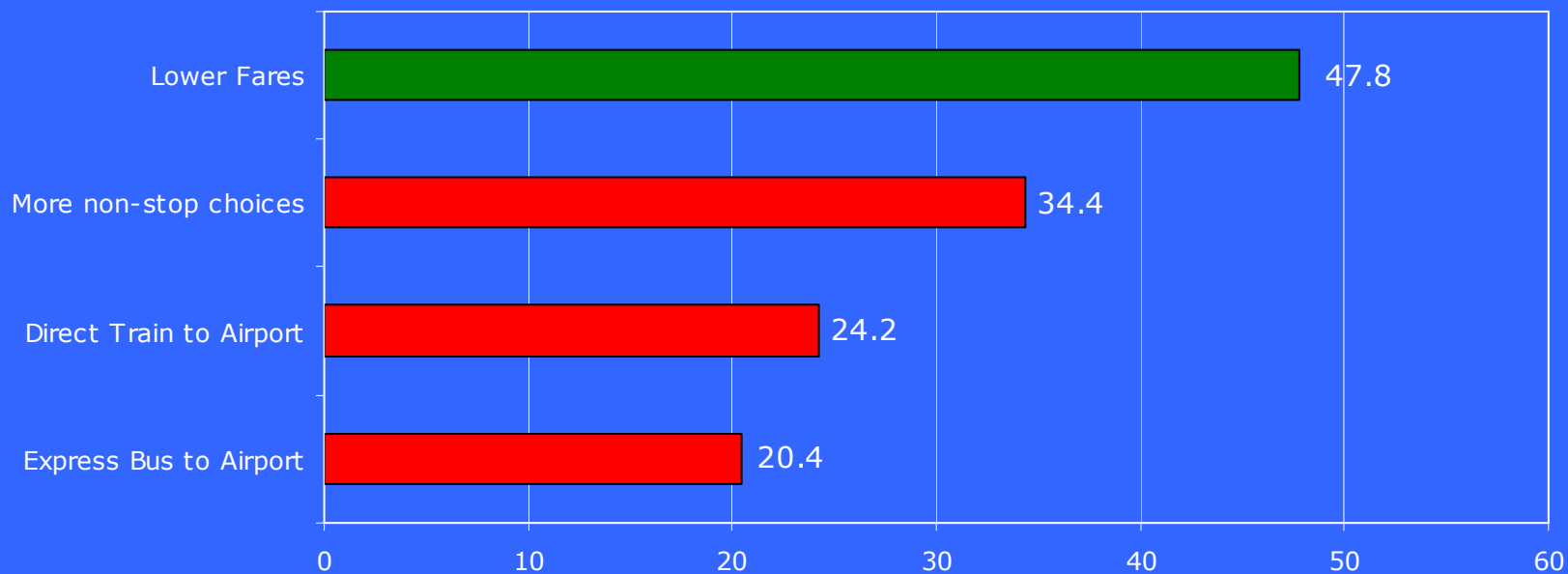
- Passengers primarily choose an airport based its proximity to the local trip origin.
- Frequency of air service in desired travel market and schedule convenience are other major determinants in passengers choice of JWA.
- Air service considerations are more important to JWA passengers choice than are air fares.



Potential Drivers of Regionalization

- Assuming the air service variables of frequency, market, and price are equal; passengers will choose the closest airport (travel time).
- Price will be primary determinant in modifying airport choice.
- Express rail/bus transport has the potential to reduce access travel times to outlying airports to augment constrained capacity at JWA.

What would influence your decision to fly from Ontario or San Bernardino?



Opportunities for Regionalization

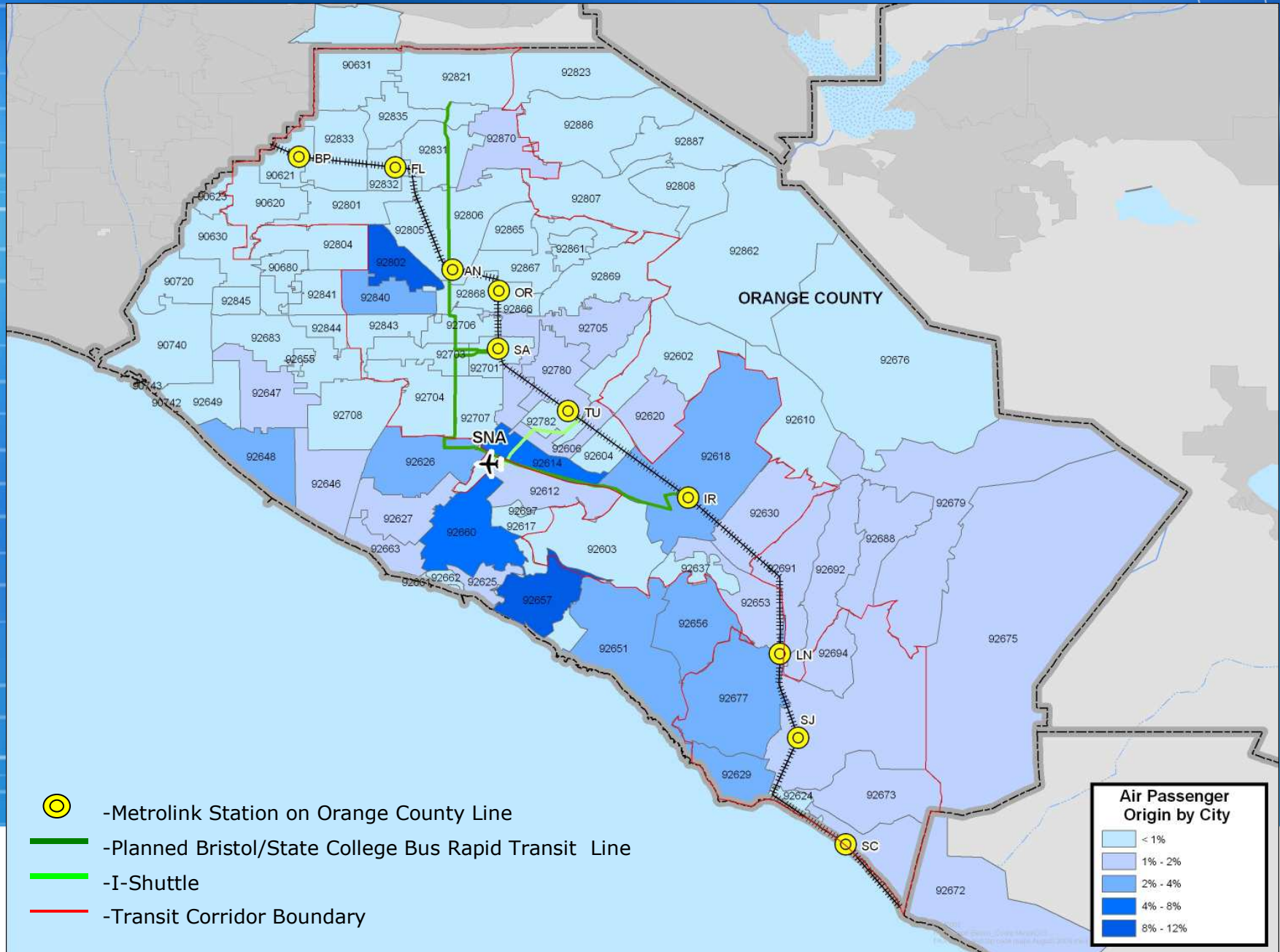
■ Short Term Strategy

- Target Changing Airport Preferences of Sub-Segments of Aviation Market
 - Disney Resort
 - North Orange County Cities

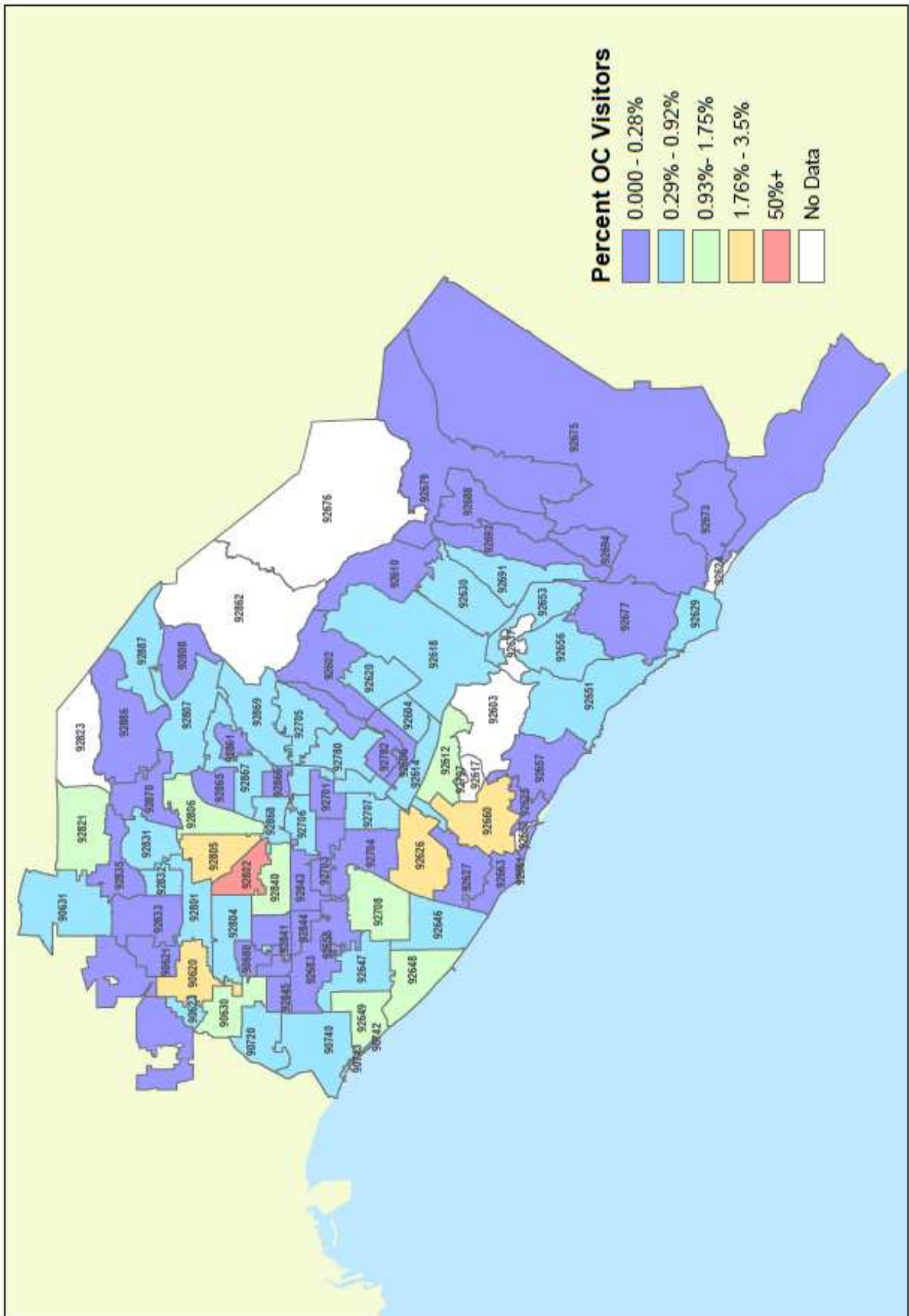
■ Long Term Strategy

- Use Integrated Air-Rail To Alter Airport Access Times
- Transfer Short-Haul Air Demand to Rail

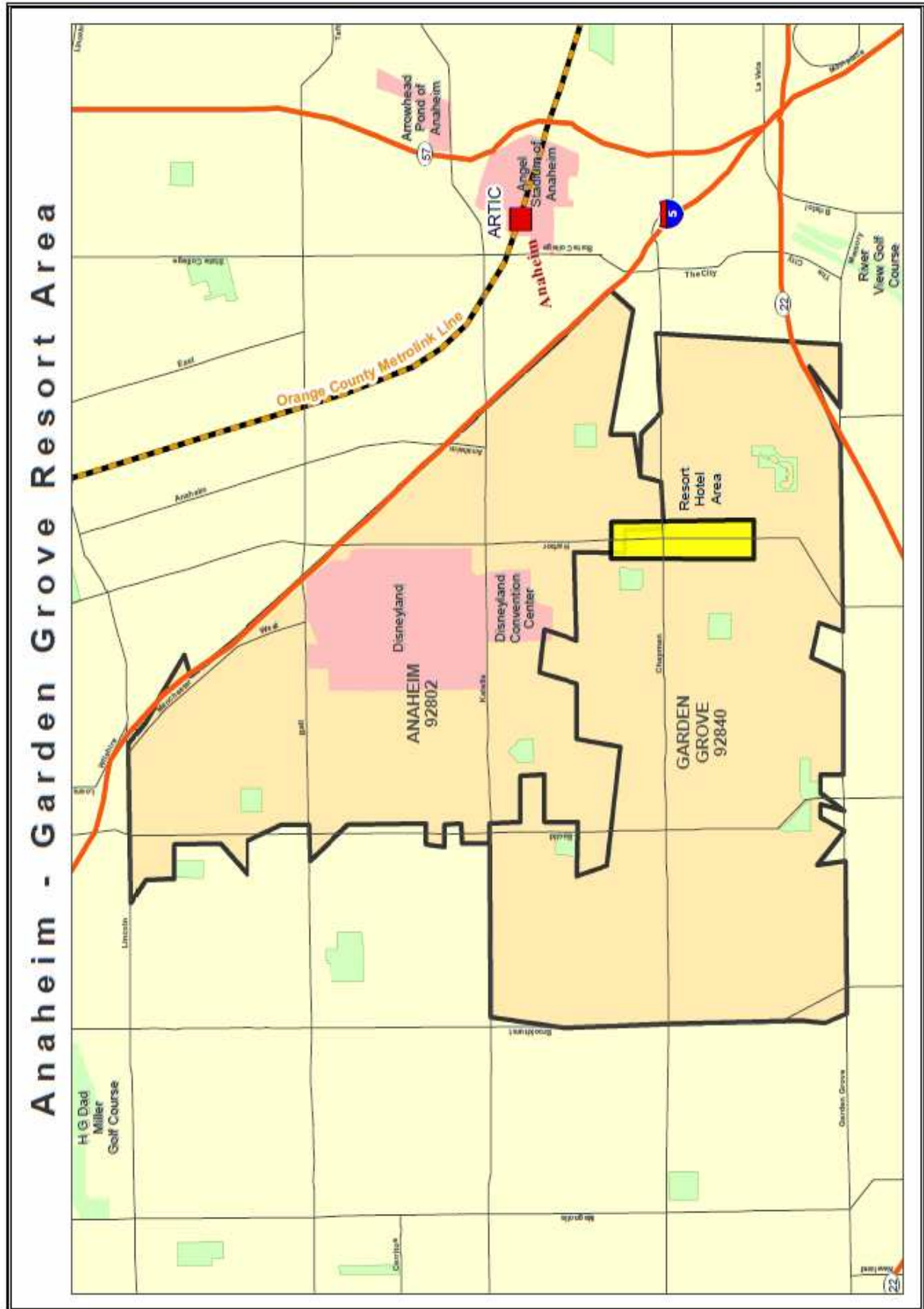
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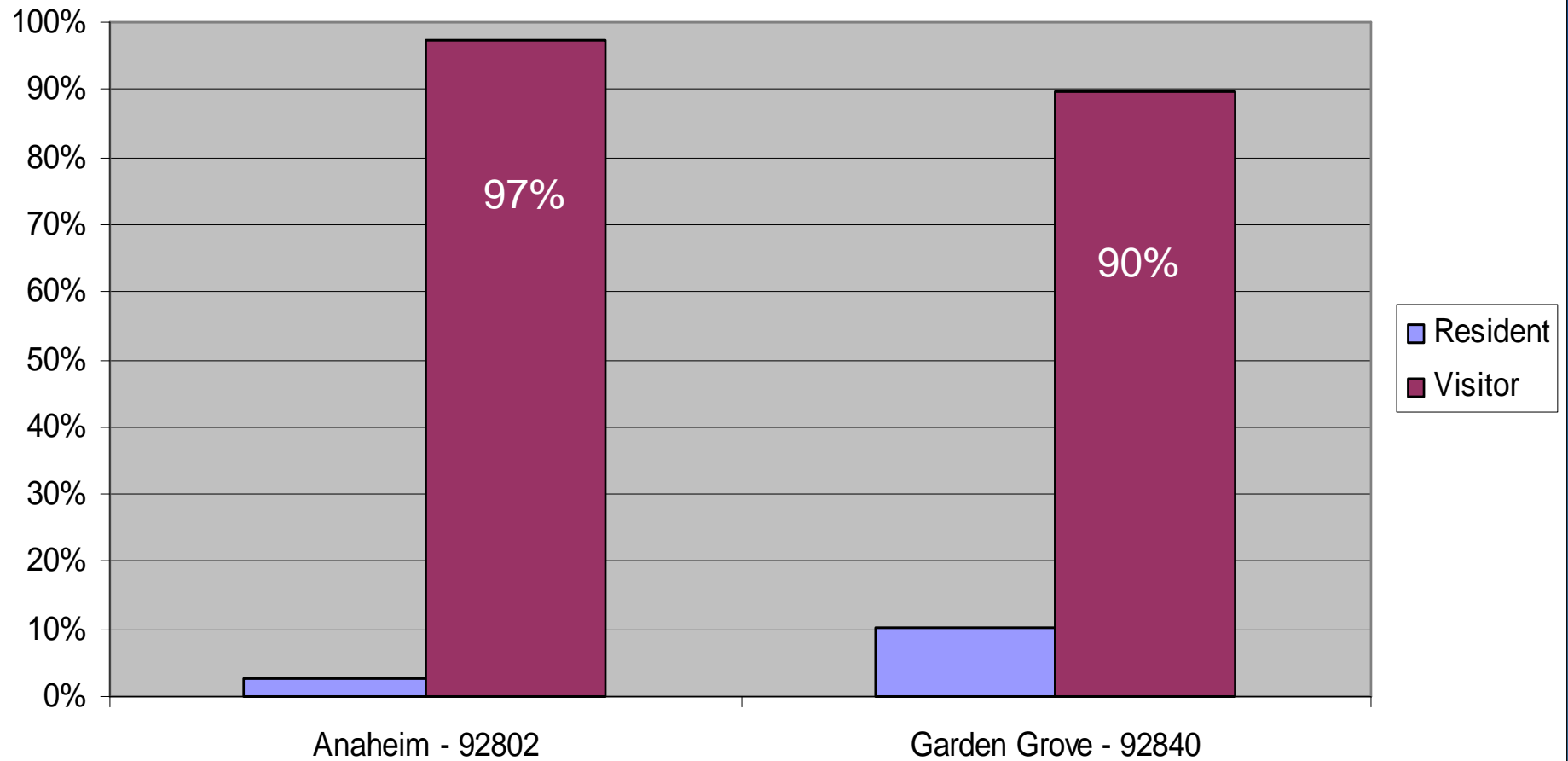
Orange County Visitors Using LAX



Anaheim – Garden Grove Resort Area

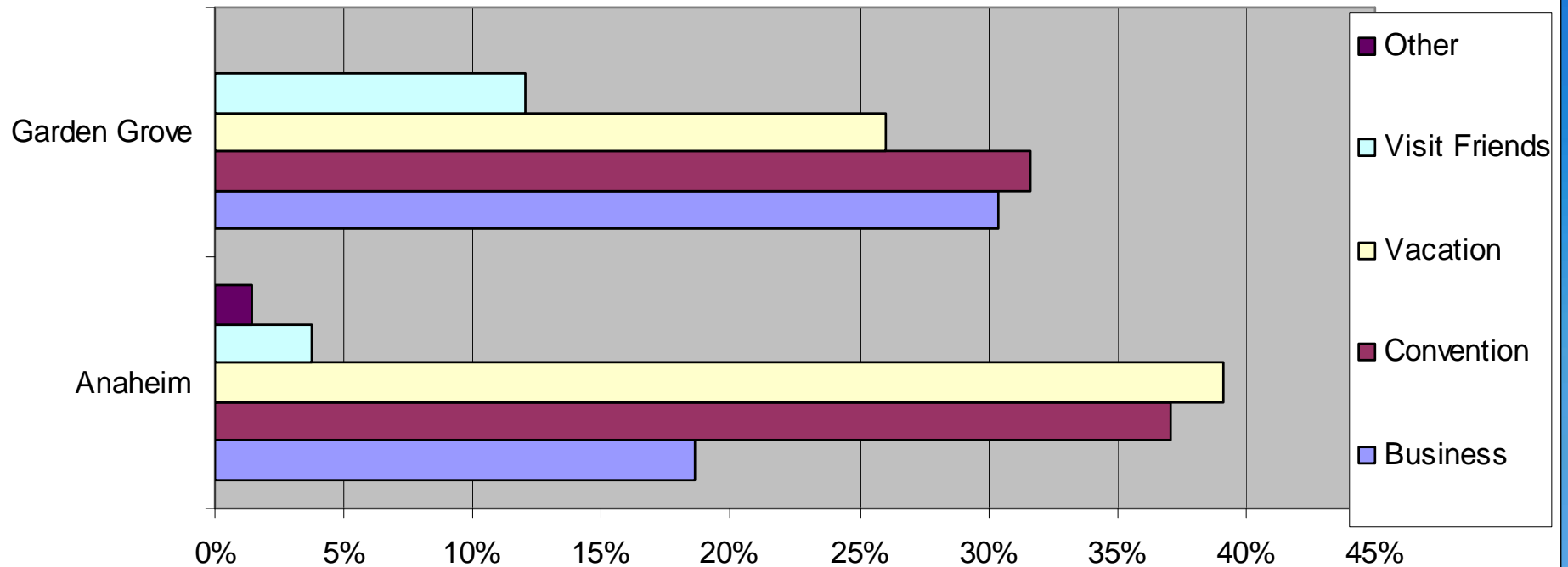


JWA PAX – Residents/Visitors

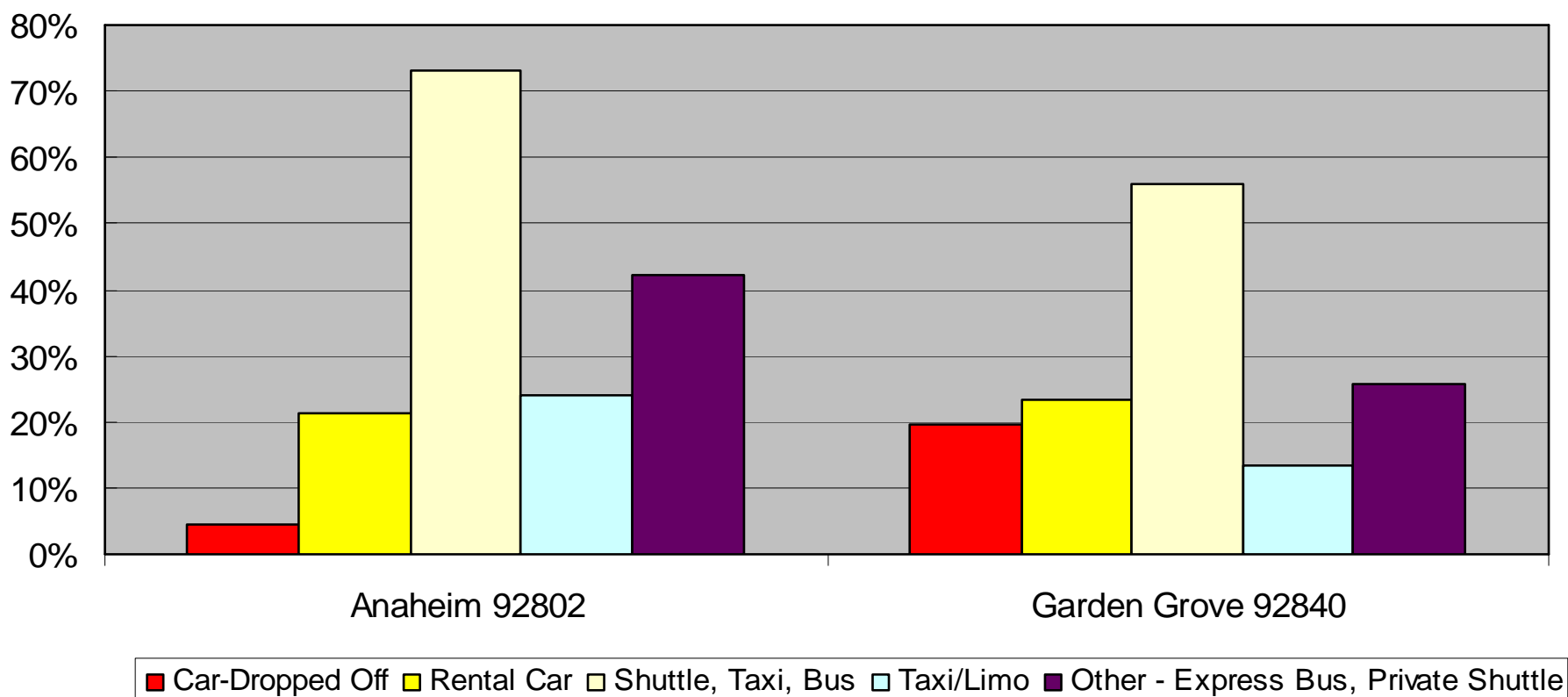


JWA PAX – Trip Purpose

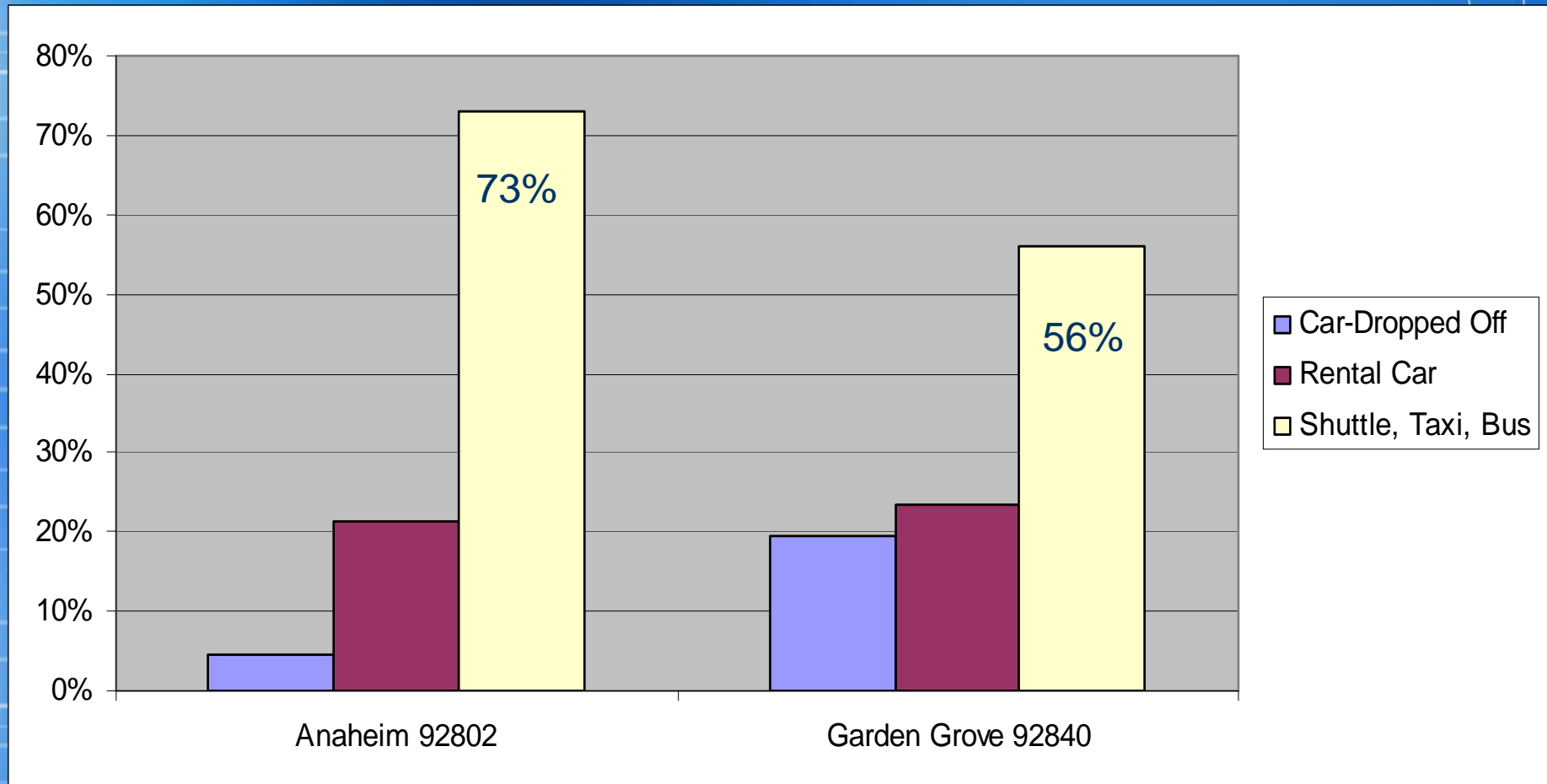
**Purpose of Trip by Zip Code
Anaheim Resort Area**



JWA PAX – Airport Transit Mode



JWA PAX – Airport Transit Mode



Travel Times to Disney Resort

Airport	Mileage	Travel Time (minutes)
John Wayne Airport	12.69	16 - 30
LAX	34.07	38 - 85
Ontario International Airport	34.73	41 - 60
Long Beach Airport	19.35	24 - 35

Ground Transit Cost from Airport to Disney Resort

For Two Adults

Round Trip Transport Costs	Private Vehicle	Private Shuttle Service	Disney Express Bus
Disney Resort to JWA	47.52	\$20.00	\$30.00
Disney Resort to LAX	11.88	\$32.00	\$40.00
Disney Resort to Ontario	\$46.44	\$52.00	N/A

Ground Transit Cost from Airport to Disney Resort

For family of two adults & two children

Round Trip Transport Costs	Private Vehicle	Private Shuttle Service	Express Bus
Disney Resort to JWA	47.52	\$40.00	\$56.00
Disney Resort to LAX	11.88	\$64.00	\$57.00
Disney Resort to Ontario	\$46.44	\$70.00	N/A

Air Passenger Incentives

UP TO \$500 CASH BACK REBATE
When you travel to the BAHAMAS! Now - Feb 28th, 2009

3 Night Packages w/ Air From
\$224
BOOK NOW

Examples:
Paradise Island Harbour Resort (Paradise Island) - 3 Nights w/ Air From \$304
Viva Wyndham Fortuna Beach (Grand Bahama Island) - 3 Nights w/ Air From \$374



Air Passenger Incentives

Chicago Airport Alternative:

Chicago Rockford International Airport (RFD)

Sign up today for
MilesAhead and
receive e-mail savings
and a **\$25** Travel
Certificate good to any
destination from RFD!

Sign Up For
"MILESAHEAD"
RFD's Regionally-Sponsored Customer Rewards Program

Apple Vacations now
offers seasonal non-
stop jet service to
Cancun, Mexico
December 27, 2008 -
April 18, 2009.

**Departing Flights
from RFD:**

Saturdays & Sundays
**Inbound Flights from
Cancun:**
Fridays & Saturdays

Air Passenger Incentives

Disney Incentives

Price Break on Tickets:

One Day Disney Ticket - \$59-69

Two Day Park Hopper Ticket - \$123 – 143

Early Entrance into Disney Park

Disney Dollars to use in the Park

Opportunities to Shift Short Haul Air Demand

