

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

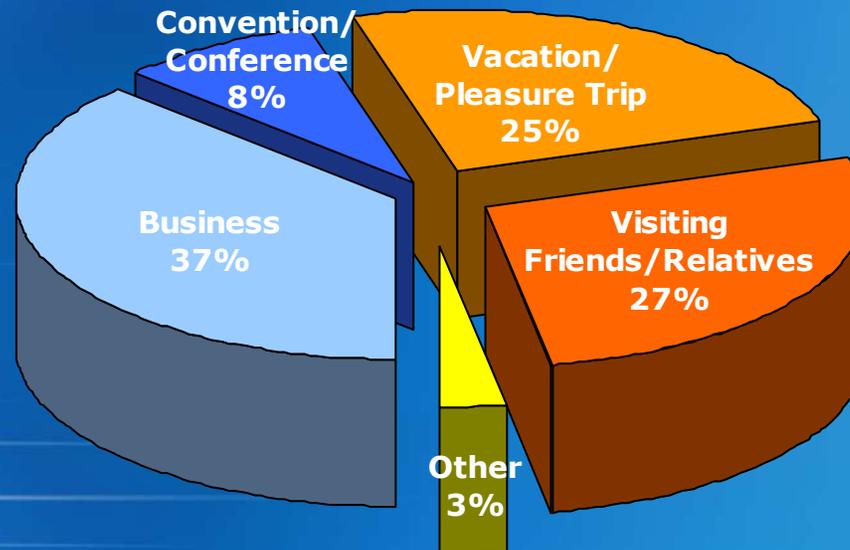
JWA Air Passenger & Employee Market



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

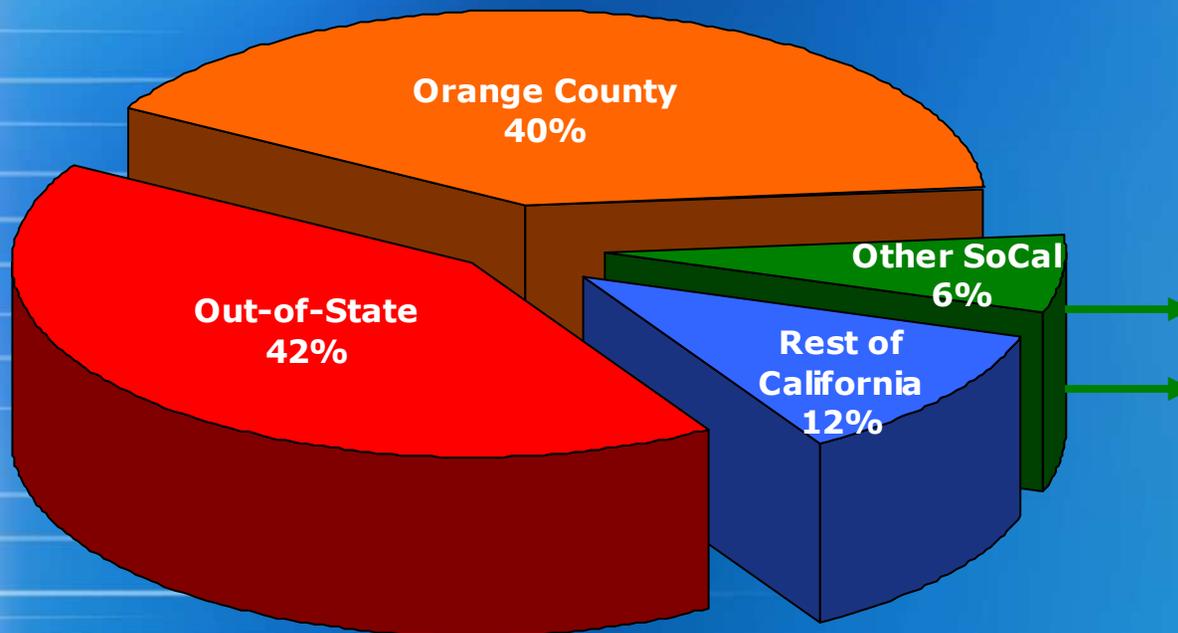
JWA Trip Purpose:



Resident – Visitor Mix

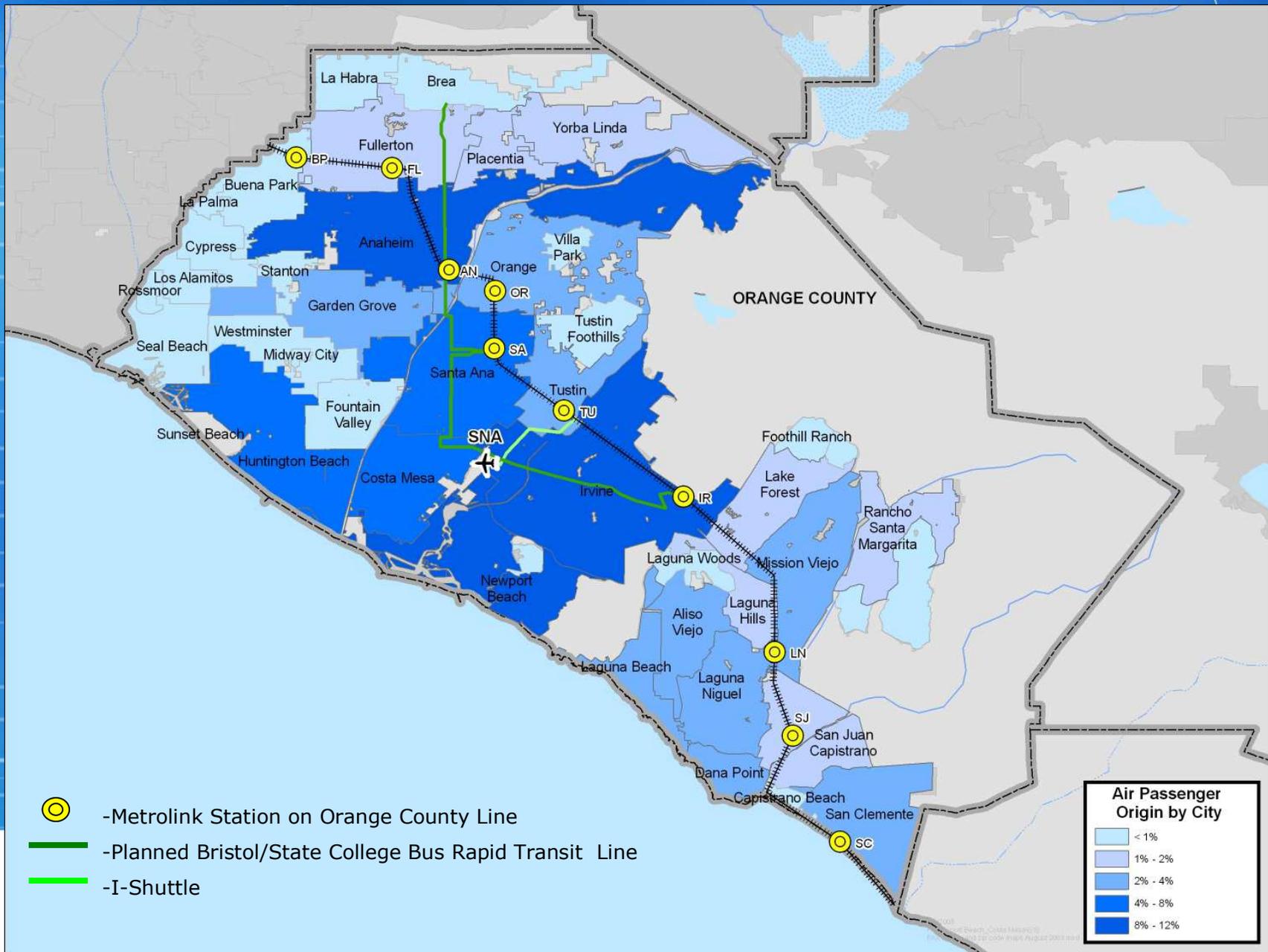
- 40% of JWA passengers are Orange County residents
- 6% are from adjacent counties
- 56% are visitors.

Passengers Primary Residence:

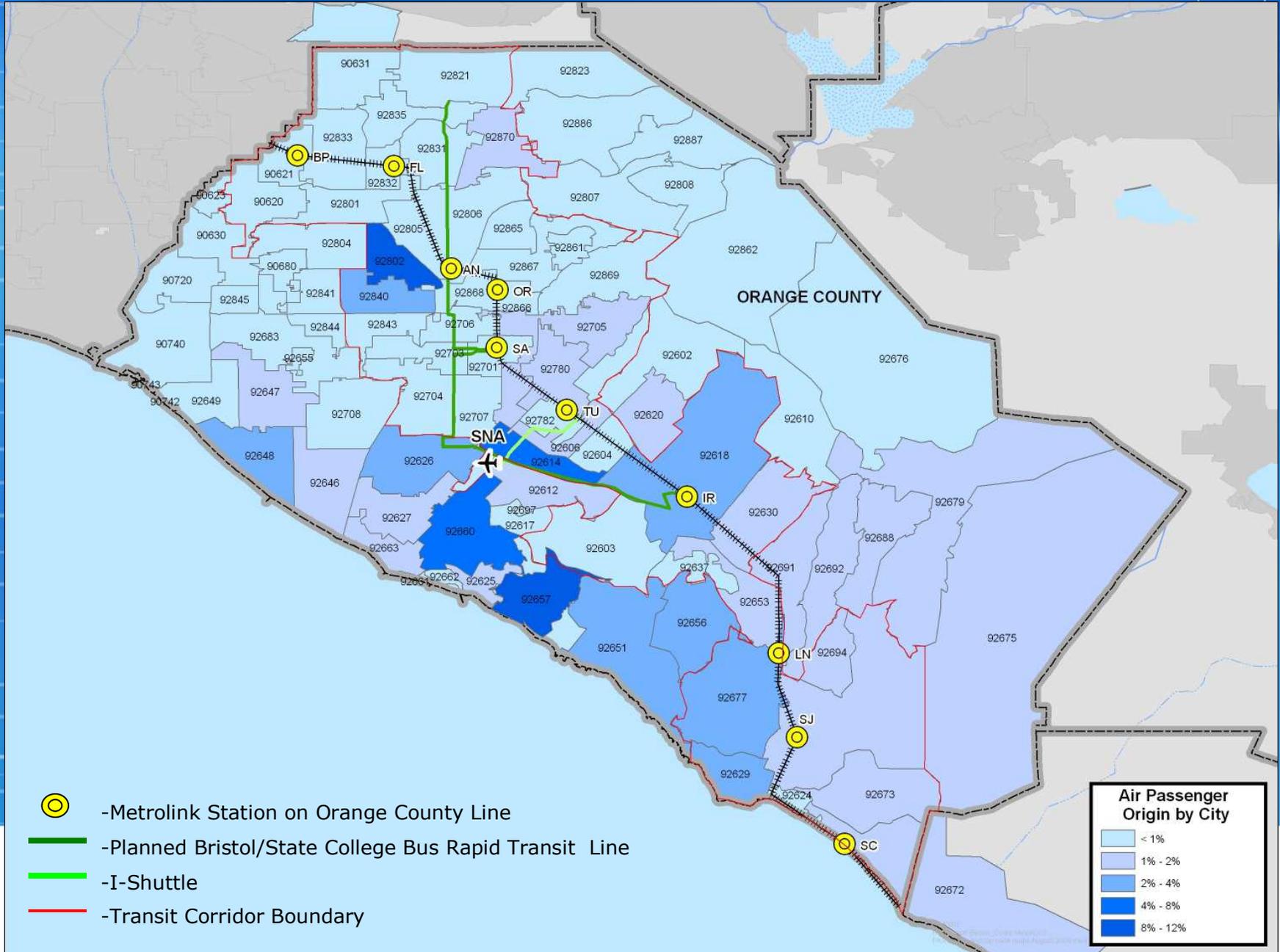


COUNTY	City	% Share
LOS ANGELES	Long Beach	1.0%
	Los Angeles	0.3%
	Lakewood	0.2%
	RIVERSIDE	1.8%
RIVERSIDE	Corona	0.5%
	Murrieta	0.3%
	Riverside	0.3%
SAN BERNARDINO		0.7%
SAN DIEGO		0.7%
TOTAL		6.2%

Passenger Trip Origins by City



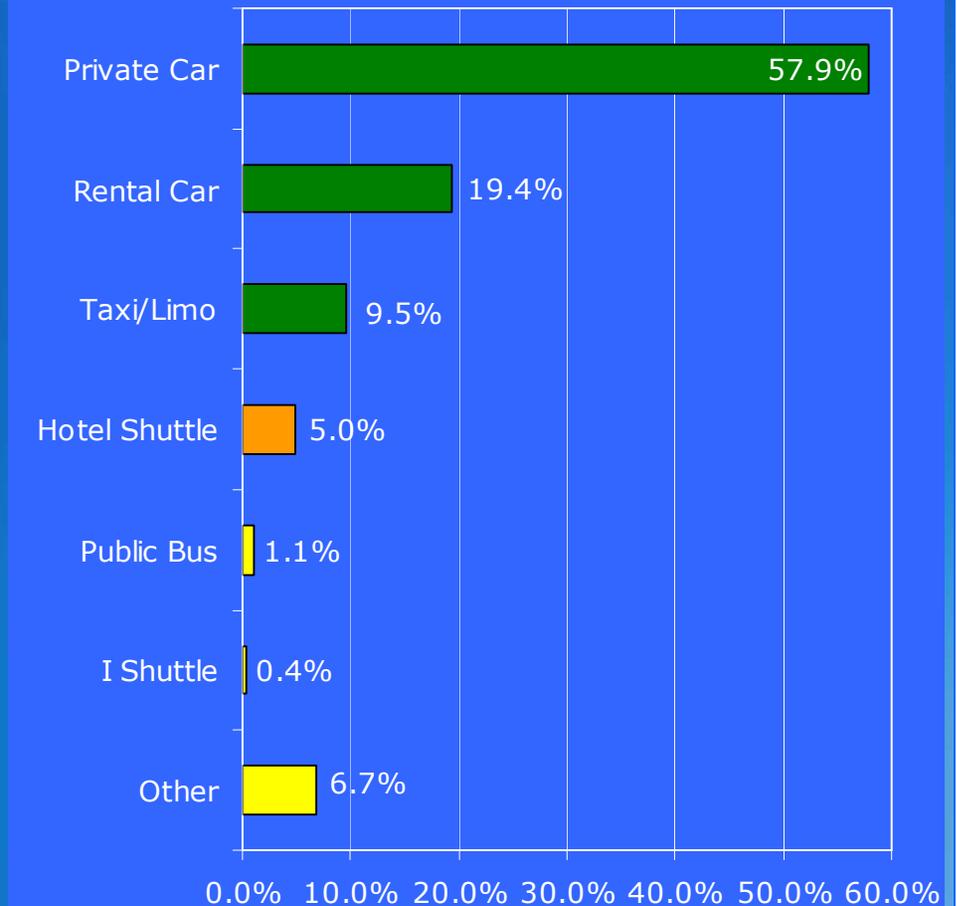
Passenger Trip Origins by Zip Code



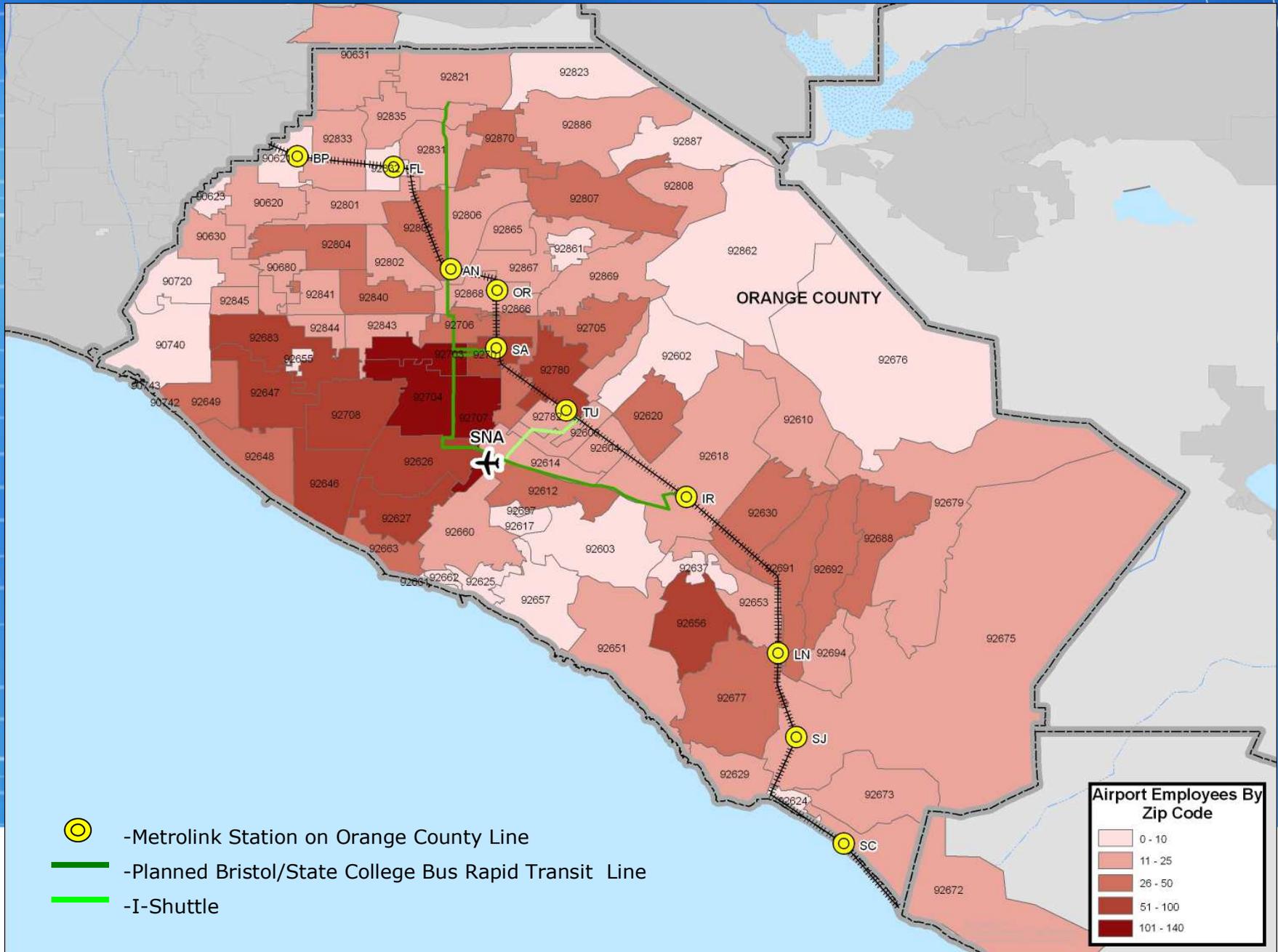
Ground Transportation Mode

- 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

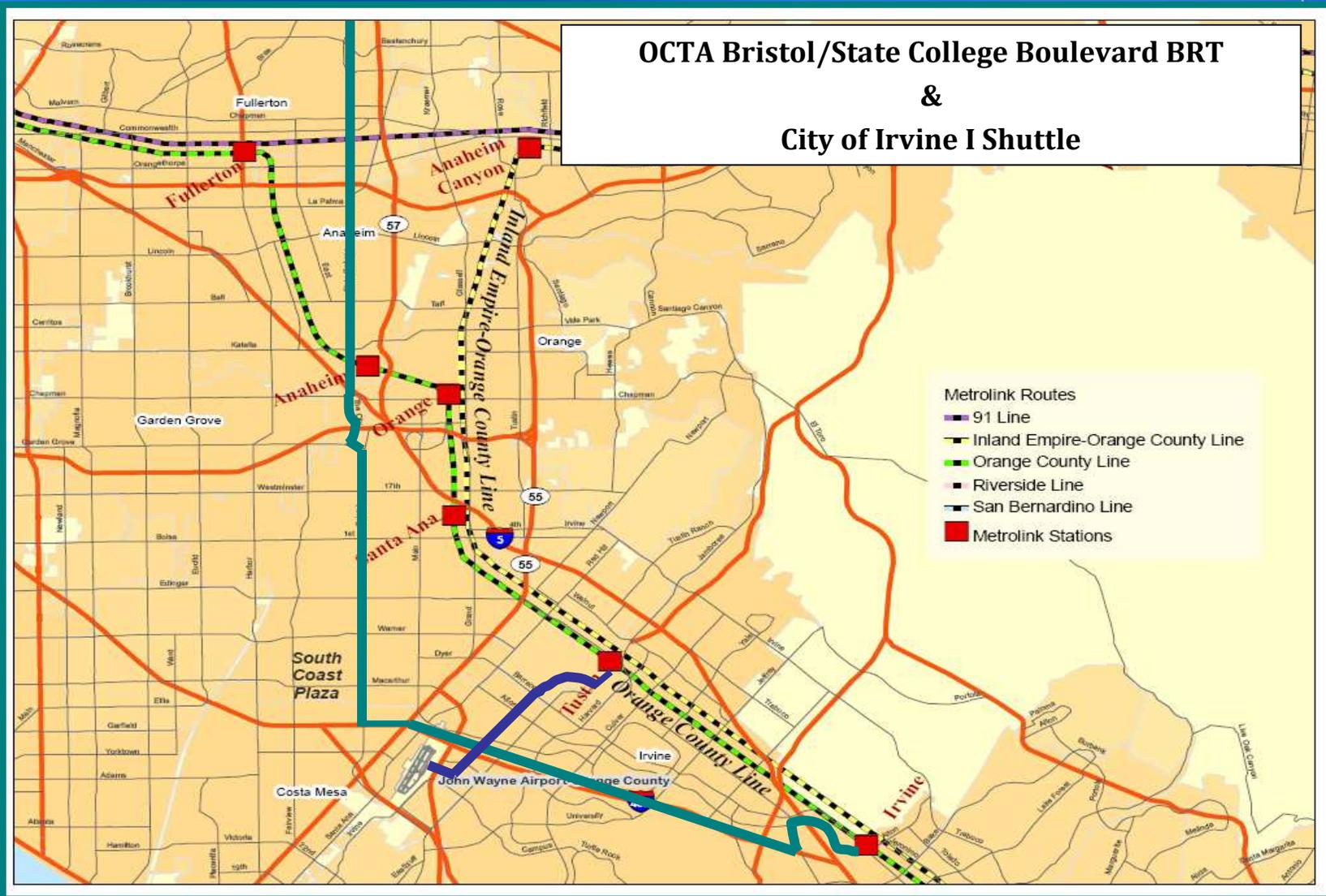


Transit Evaluation Framework

- 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



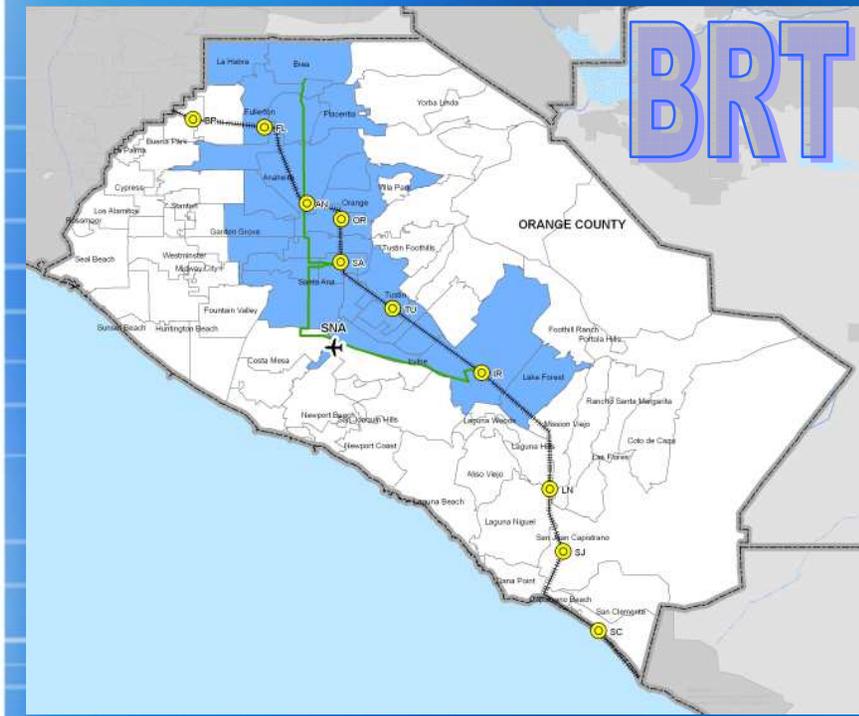
OCTA Bristol/State College Boulevard BRT ———

City of Irvine I Shuttle ———



Geographic Market for Transit

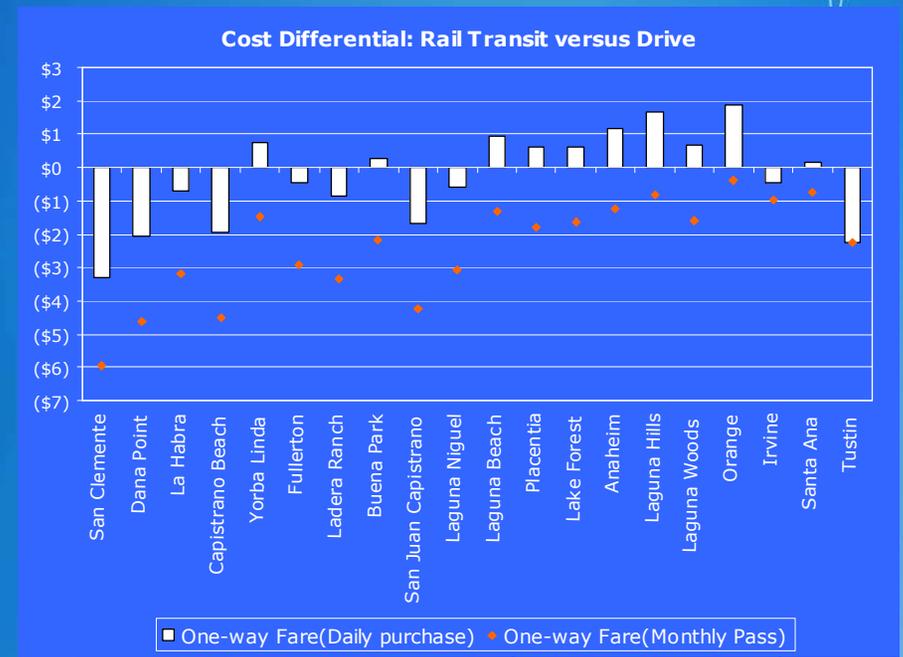
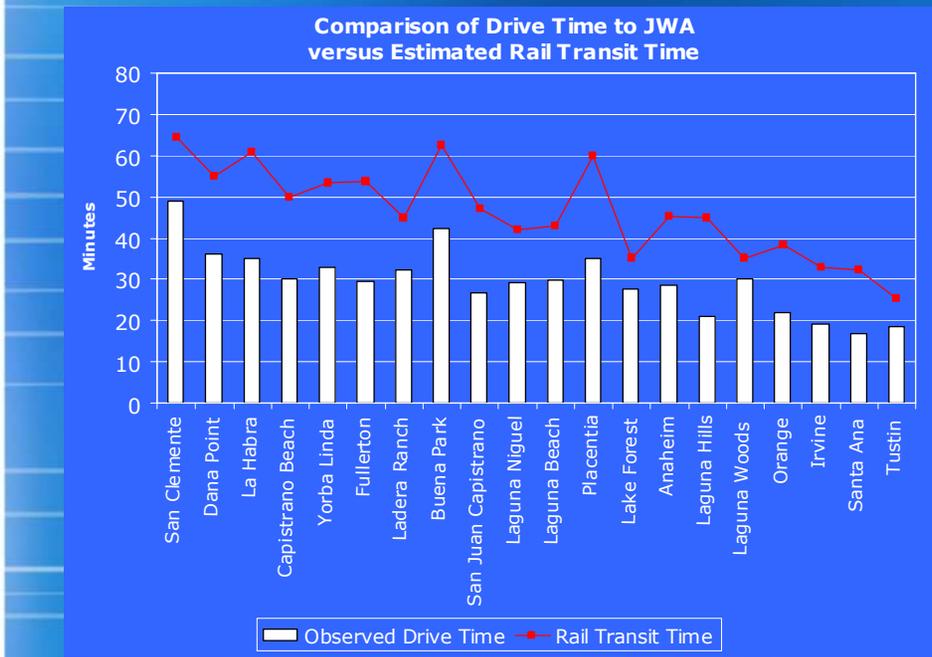
- Metrolink serves 48% of passenger base and 43% of JWA employees
- Provides potential to attract South County air passengers



- 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

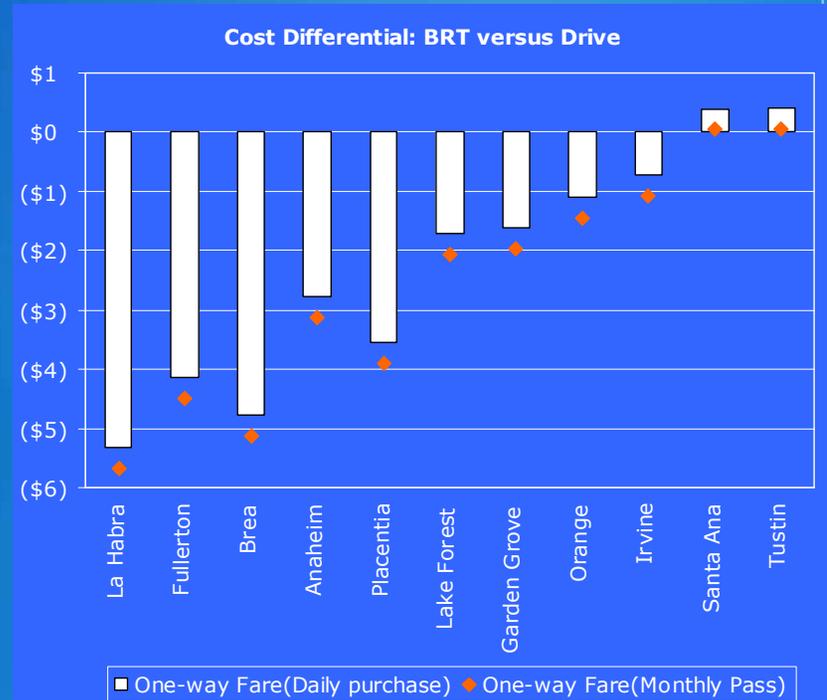
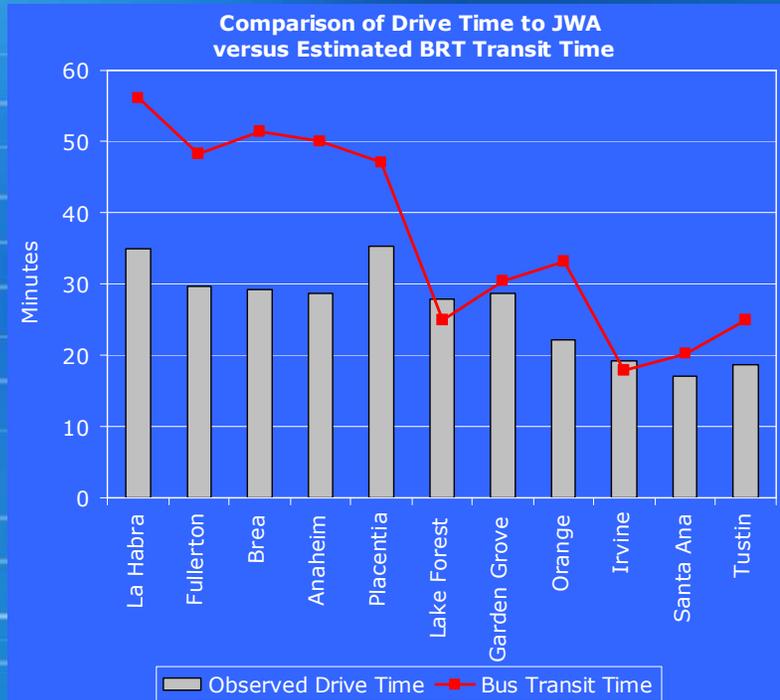
Rail Transit—Time/Cost Evaluation

- 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

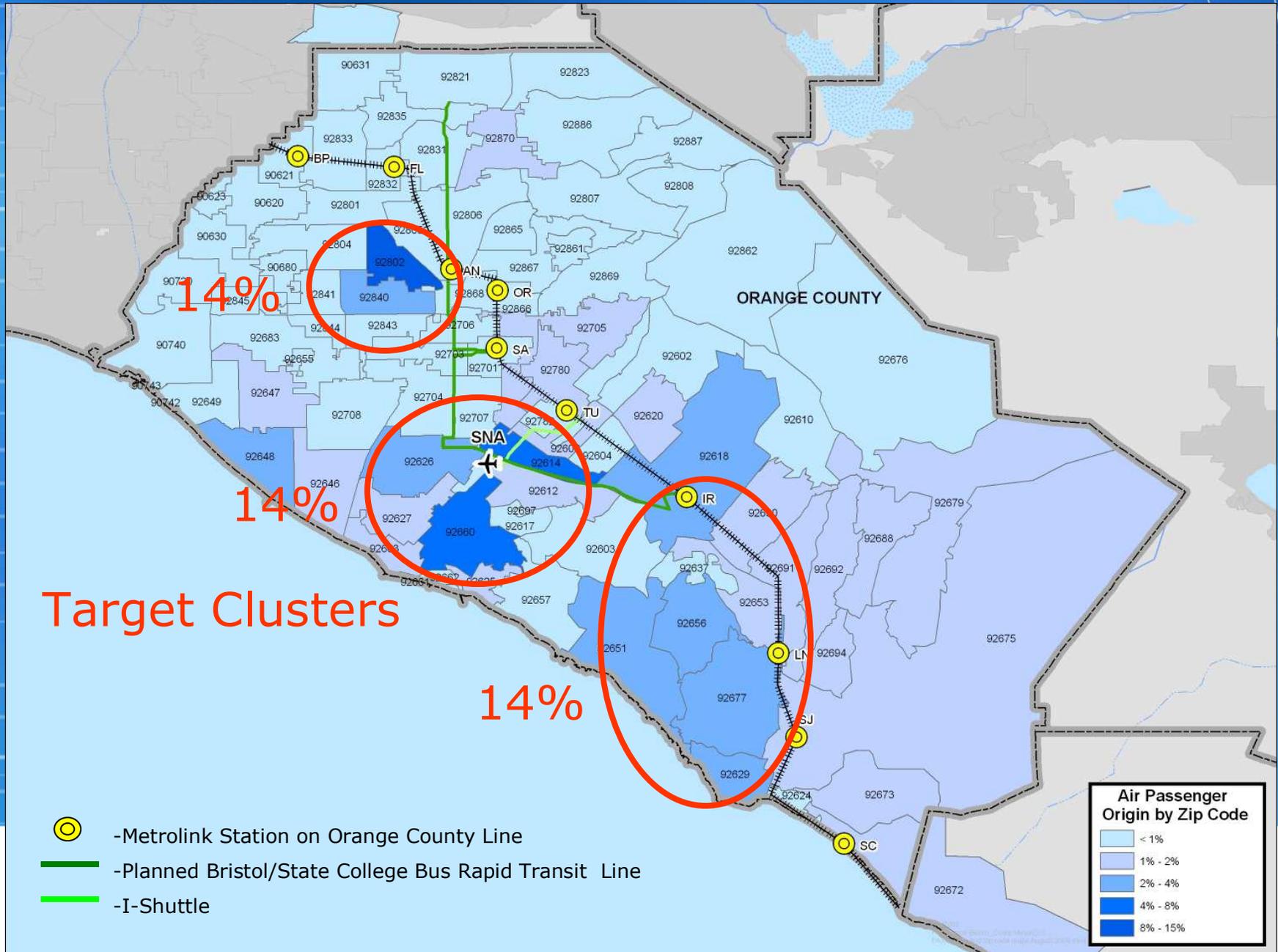
- Passenger pool derived from geographic market area, demographic market, and stated preference for use of transit options.
- Passenger ridership range estimated between 500 and 2,000 passengers per day
- A range of 2-5% growing to as much as 10% was used to generate low and high ridership levels for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

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

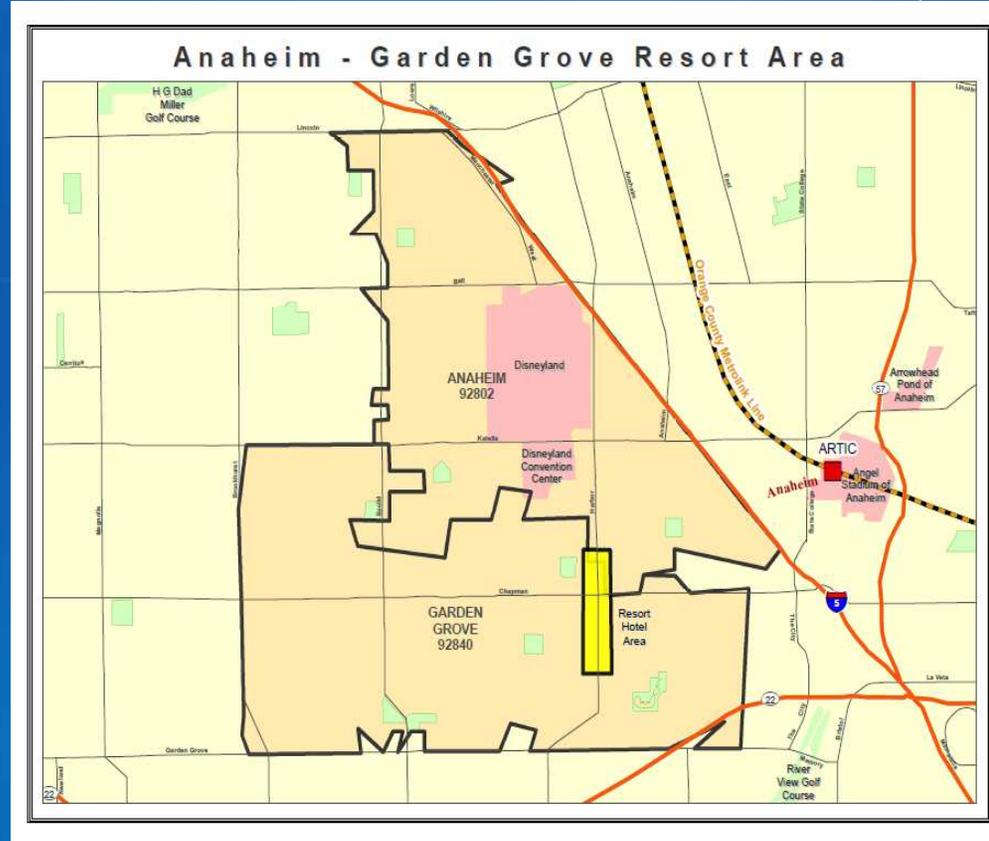


City	Zip	Visitors	Taxi, Limo, Shared Ride, Bus	Rental Car	Private Cars	Visitor Origin at Hotel
Aliso Viejo	92656	24%	11%	4%	85%	0%
Dana Point	92629	58%	18%	22%	60%	62%
Irvine	92618	66%	18%	38%	44%	36%
Laguna Beach	92651	79%	28%	33%	39%	74%
Laguna Niguel	92677	33%	8%	9%	83%	8%
San Juan Capistrano	92675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

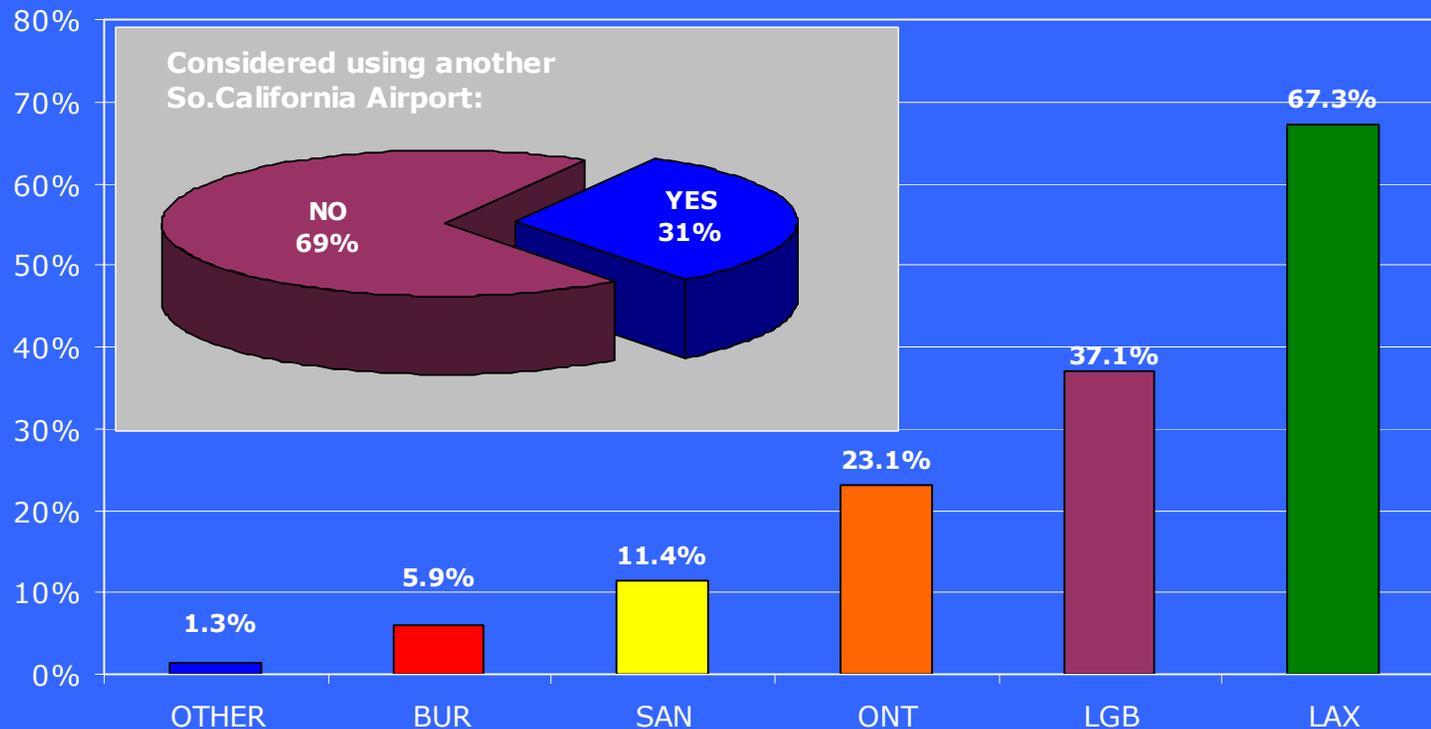
Airport Choice Factors & Regionalization



Southern California Airports Considered

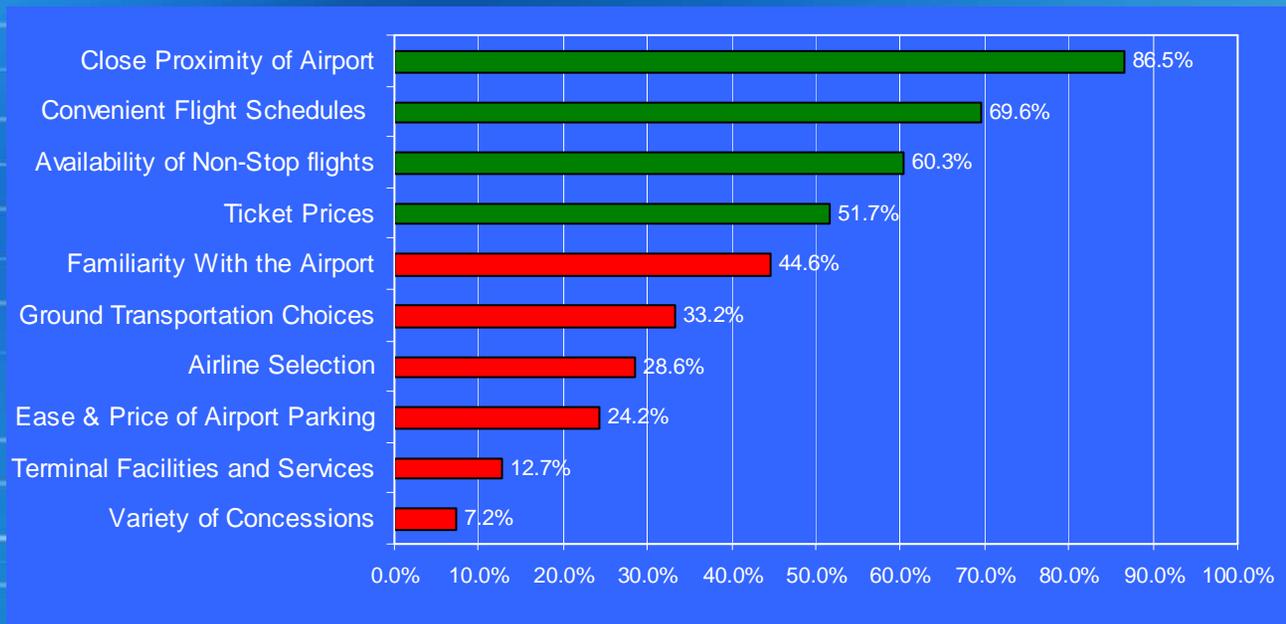
- 31% of JWA passengers considered other airports.
- LAX is primary alternative to JWA.
- 50% of passengers took one or more trip from other So Cal airports in the past year.

Alternate Airport Considered:



Airport Choice Factors

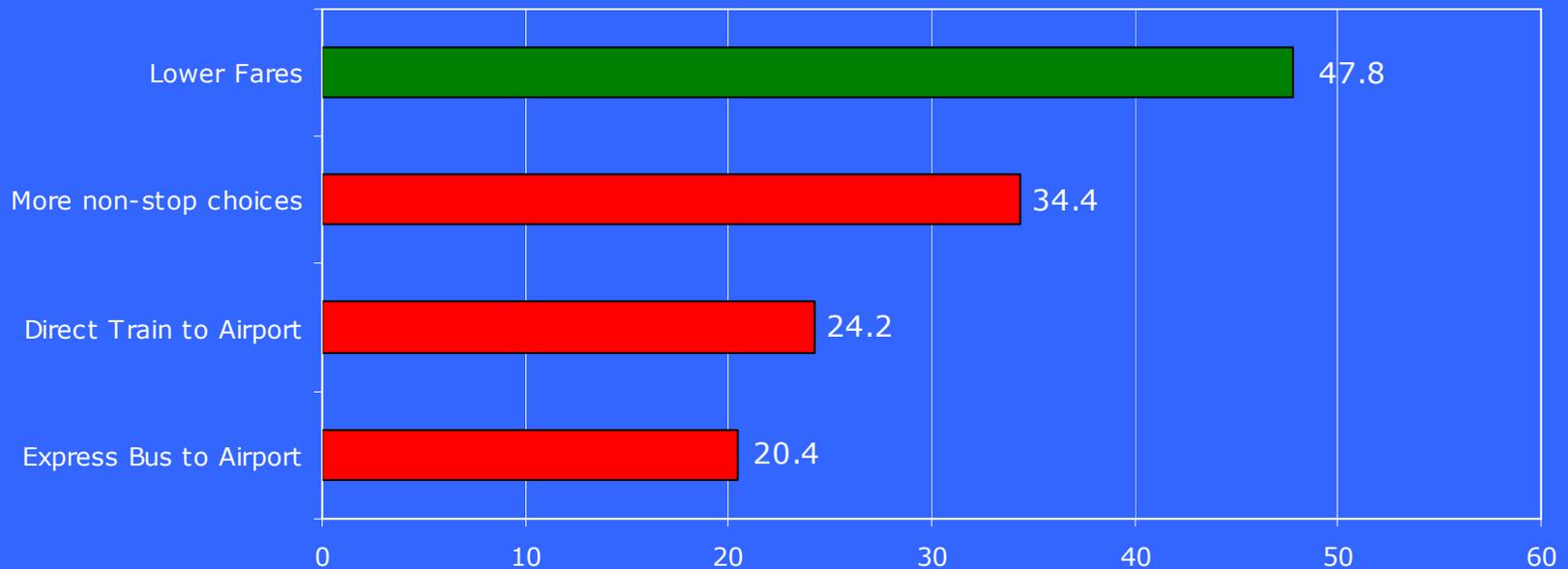
- Passengers primarily choose an airport based its proximity to the local trip origin.
- Frequency of air service in desired travel market and schedule convenience are other major determinants in passengers choice of JWA.
- Air service considerations are more important to JWA passengers choice than are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

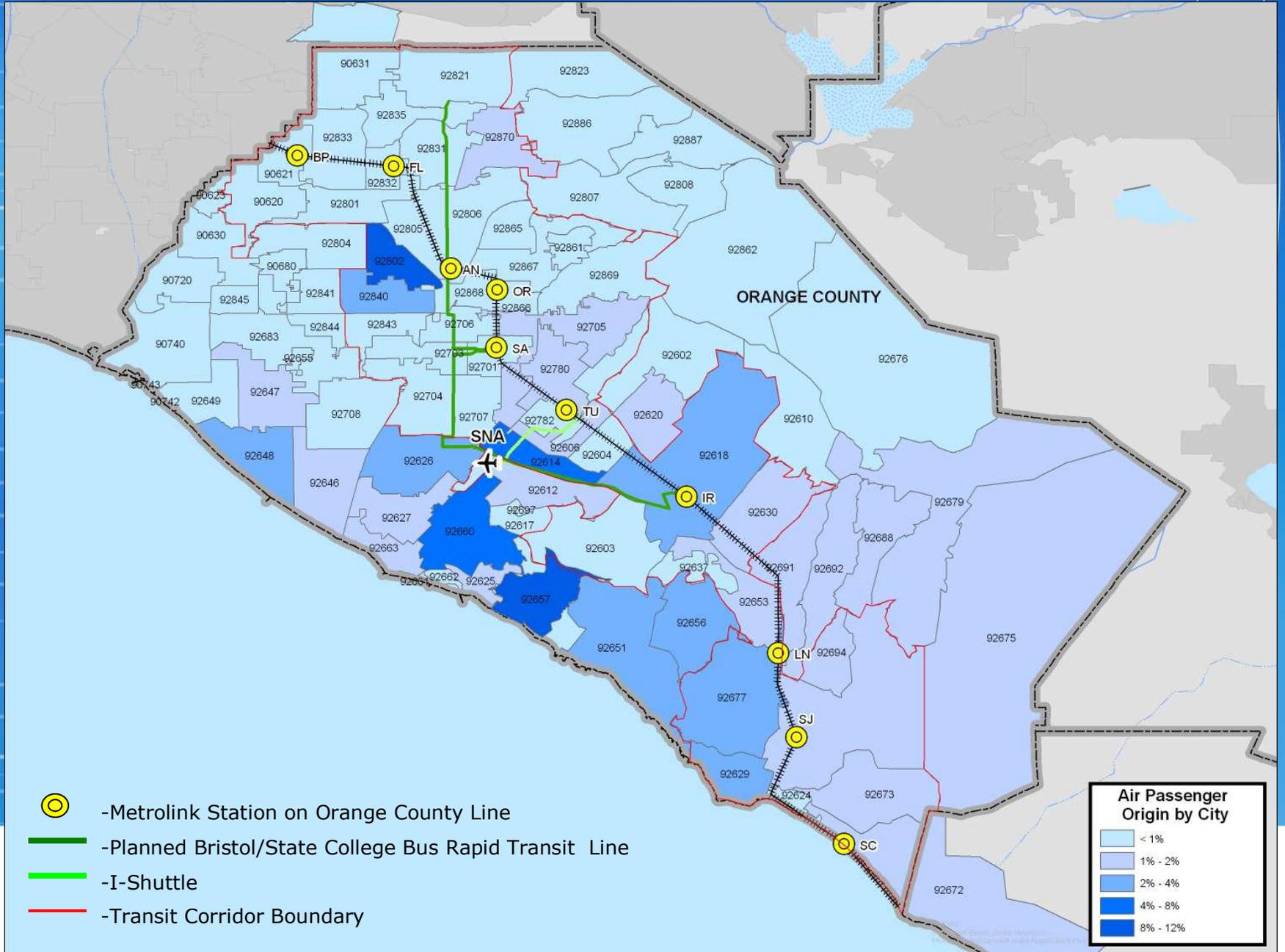
■ Short Term Strategy

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

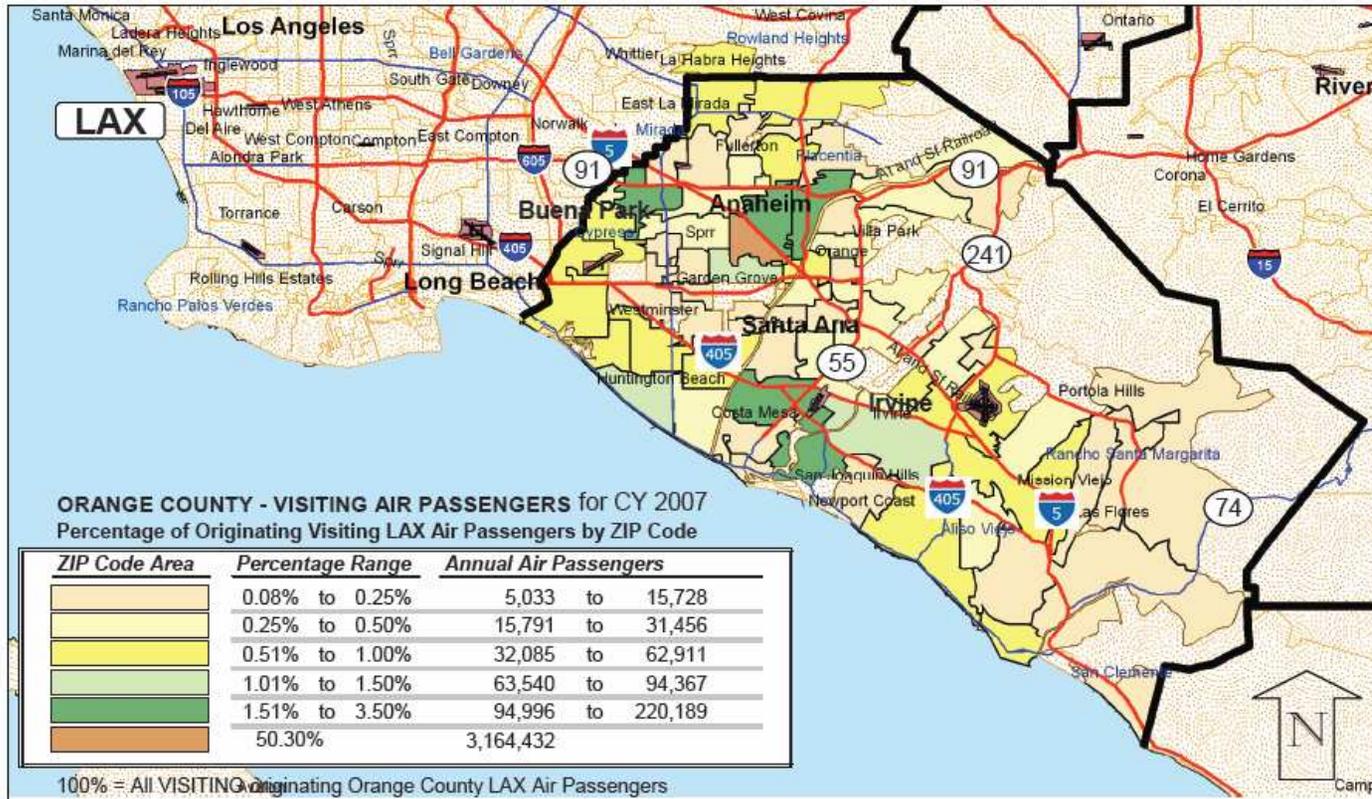
■ Long Term Strategy

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

JWA Passenger Trip Origins Are Concentrated



OC Passenger Trips To/From LAX Reflect Similar Pattern



Orange County, California
LAX Visiting Passenger Origins
 (Percent = Percent of total visiting passengers in Orange County)

Total 2007 Originating LAX Air Passengers	40,851,410
Total 2007 Originating LAX Visitors	17,974,620
Total 2007 Originating Orange County Visitors	6,291,117

Prepared by Los Angeles World Airports, Airports and Facilities Planning Division, May 20, 2008
 DATA SOURCE: 2006 LAX Air Passenger Survey Report – December 2007



Future Opportunities to Shift Short Haul Air Demand

