



John Wayne Airport Survey

2019 Report

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Executive Summary



John Wayne Airport has been conducting biannual surveys since 1994 in order to measure passengers' perceptions of the airport including satisfaction, frequency of use, and to compile travel and demographic information. This is the second wave Phoenix Marketing International has been contracted to conduct the surveys on the airport's behalf.

Two surveys were conducted concurrently between September 26 and October 3, 2019, one among airport passengers and one among Orange County residents. The passenger survey was conducted among 613 departing passengers in the gate hold area while they waited to board their flights. The resident survey was conducted among 400 Orange County residents recruited from online panel sample, screened to be OC residents over the age of 18 who have flown out of John Wayne Airport in the past 12 months.

Overall, 93% of passengers surveyed are satisfied (giving a Top 2 Box score – a rating of 4 or 5 on a 5-point scale) with their experience at John Wayne Airport. Two-thirds (64%) of passengers rate JWA as a 5 out of 5, while three in ten (29%) gave a rating of 4. One percent of passengers are very dissatisfied overall. There is no significant difference in passenger satisfaction this year compared to 2017.

Overall, 89% of residents are satisfied with John Wayne Airport (Top 2 Box). About half (47%) of Orange County residents are very satisfied (rating a 5 out of 5). Only 1% of residents are dissatisfied (giving a Bottom 2 Box score – a rating of 1 or 2). There is no significant difference in satisfaction this year compared to 2017.

Executive Summary



Regression analysis was employed to determine key drivers of satisfaction. This ties together the impact of individual service areas of the airport on overall satisfaction. Improving the areas that have the highest impact on satisfaction is advised as they have the highest potential return on investment.

Top 3 Drivers of Overall Satisfaction – Passenger Survey

- The quality of news, gift, and other retail services of JWA #1
- Making you feel safe and secure in the terminals #2
- Cleanliness of airport terminals #3



Overall Airport Satisfaction

Top 3 Drivers of Overall Satisfaction – Resident Survey

- #1 Services provided by Uber, Lyft, or Wingz
- #2 Cleanliness of airport parking structures
- #3 The quality of news, gift, and other retail services of JWA

Methodology



RESIDENT SURVEY

n = 400 Orange County residents

Surveying was conducted between September 26 and October 3, 2019

Previous residential surveys were comprised of phone and online fielding; this year sampling was changed to exclusively online

Online sample was used to reach potential respondents within the Orange County area

400 respondents were recruited through the online survey

Respondents were screened to be Orange County residents who flew out of John Wayne Airport at least once in the last 12 months, and 18 years of age or older

The total Resident sample of n = 400 yields a statistical accuracy of +/- 4.9 percent at the 95% confidence level

No data weighting was applied to the residential sample



PASSENGER SURVEY

n = 613 departing passengers

Interviews were conducted daily from September 26 to October 3, 2019 between 6am and 10pm to ensure a representative sample of departing passengers

Passengers were selected by trained interviewers using random selection procedures in the gate areas

Interviewers asked initial screening questions and if respondents felt comfortable, the surveys were self-administered on electronic tablets (iPads) with the interviewer available to assist

187 respondents are Orange County residents, and 426 are visitors to the area

The total passenger sample of n = 613 yields a statistical accuracy of +/- 3.96 percent at the 95% confidence level

The data was weighted based on hourly passenger volume provided by the airport

ANALYSIS

The Resident and passenger survey questionnaires were kept nearly identical to the previous year's (2017) survey. Both surveys had six questions added about interest in domestic and international destinations.

This year's findings are compared to the previous 2017 findings when data is available and sample sizes are sufficient. Significant differences at the 95% confidence level are indicated by green highlighting of significantly higher values and red highlighting of significantly lower values.

Note: The 2017 wave was conducted between October 17 and November 3, 2017. Since air travel is seasonal, caution should be used when making comparisons.

Significance testing was also conducted between male and female respondents, and among the passenger data, OC residents vs. visitors and business vs. leisure travelers (leisure includes all non-business travelers).

Significant differences are noted where relevant.

Throughout the report, individual percentages may not add to 100% due to rounding.



Passenger Survey Results



Overall, 93% of passengers surveyed are satisfied (giving a Top 2 Box score – a rating of 4 or 5 on a 5-point scale) with their experience at John Wayne Airport. Two-thirds (64%) of passengers rate JWA as a 5 out of 5, while three in ten (29%) gave a rating of 4. One percent of passengers are very dissatisfied overall.

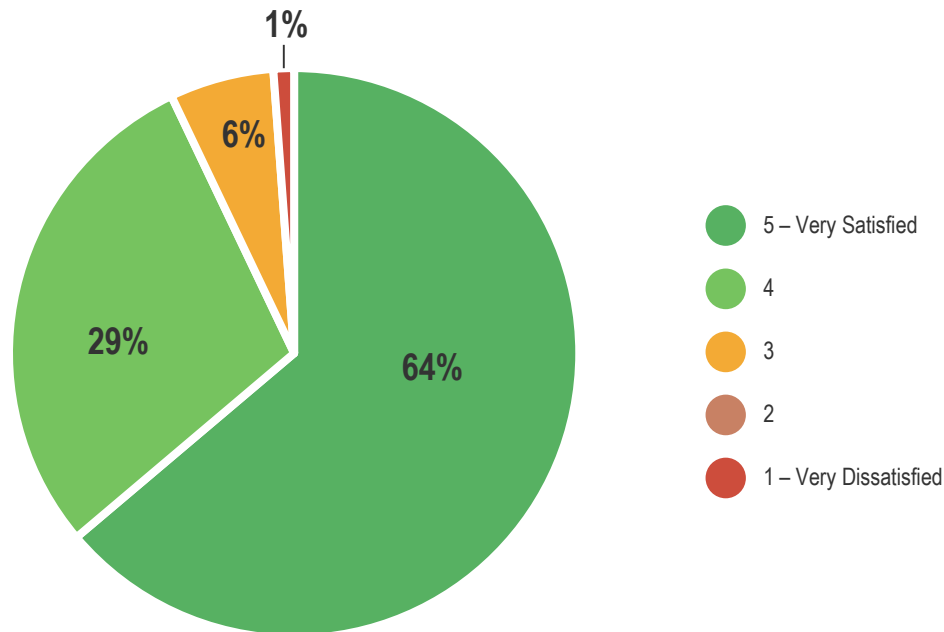
There is no significant difference in passenger satisfaction this year compared to 2017.

Base size: 2019=599 (weighted); 2017=410

Q28b. Please rate your Overall Satisfaction with John Wayne Airport. Please use a 1 to 5 scale where 1 is Very Dissatisfied and 5 is Very Satisfied.



Overall Satisfaction with Airport Among All Passengers



This year's data is compared to data collected in 2017 at the 95% confidence level. Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

Passengers who said they were satisfied with their experience at John Wayne Airport (rating a 4 or 5 on a 5-point scale) were asked to give their reasons for that score (they were allowed to select multiple reasons).

Convenient location remains the top reason for high satisfaction. There was a significant increase in passengers selecting the reasons given for almost every reason, except for *good customer service* and *nice facilities*.

Passengers who are residents of Orange County were significantly more likely than visitors to select nearly all reasons for satisfaction.

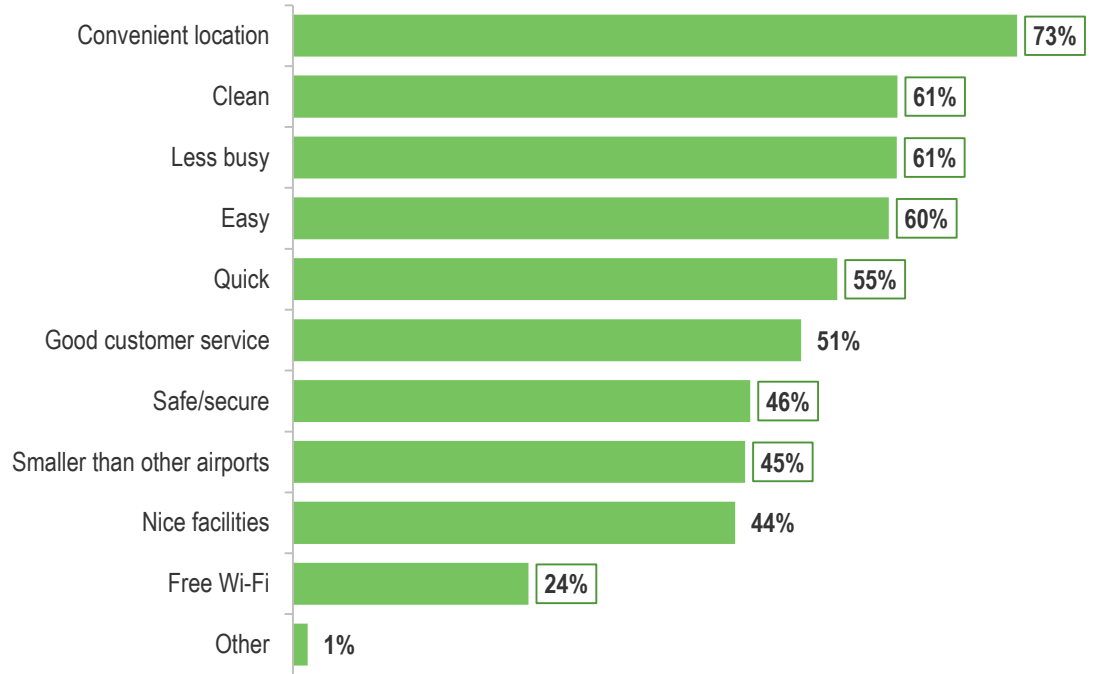
Base size: 2019=554 (weighted), 2017=385

Q29. Why did you give JWA an overall rating of [response from Q28b]? Select all that apply.



Reasons for High Satisfaction Rating

Among Passengers Giving a Positive Rating (4 or 5)



This year's data is compared to data collected in 2017 at the 95% confidence level. Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

Passengers are most satisfied with the *overall customer service provided by everyone working at the airport* and the *airport making them feel safe and secure in the terminals*. Passengers are least satisfied with the *quality of food and beverage services*.

Passengers this year are significant less satisfied compared to 2017 with *signage of airport terminals and roadways, being treated in a courteous and professional manner by TSA security screening staff, information booth service, the variety of air carriers, the quality of news, gift, and other retail services of JWA, and airport art exhibits*. Passengers this year are significantly more satisfied with *valet parking service*, though note that 2017 had a low base size for this item (n=47).

Leisure travelers are significantly more satisfied than business travelers with *feeling safe in the terminals (96% vs 90%), time through security (96% vs 91%), the security screening process (94% vs 88%), and signage of airport terminals and roadways (92% vs 85%)*.

Base sizes vary

Q28. Based on your experience with the Airport today, please rate the following items.
(Based on last experience for items not experienced today)



Satisfaction with Airport Services Among All Passengers

Ranked Highest to Lowest for 2019

	2017 (T2B)	2019 (T2B)
Overall customer service provided by everyone working at the airport	95%	95%
Making you feel safe and secure in the terminals	96%	95%
The amount of time it takes to get through security check points	93%	94%
Cleanliness of airport terminals	95%	93%
Valet parking service	79% *	93%
The security screening process	94%	92%
Cleanliness of airport parking structures	93%	92%
Being treated in a courteous and professional manner by airport police	94%	91%
Signage of airport terminals and roadways	94%	90%
Being treated in a courteous and professional manner by TSA security screening staff	95%	90%
Information booth service	96%	88%
Cleanliness of airport restrooms	90%	88%
Door to door shuttle service from the airport (e.g. Super-Shuttle or Prime-Time, Not hotel shuttle)	88%	84%
Taxi service from the airport	75%	83%
The variety of air carriers	90%	83%
Parking	74%	83%
Rental car service	86%	83%
The quality of news, gift, and other retail services of JWA	86%	76%
Airport art exhibits	84%	73%
The quality of food and beverage services at John Wayne Airport	77%	72%

* Low base size

This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

The majority of passengers have positive attitudes about John Wayne Airport. About half (52%) feel JWA provides *excellent travel service and is an asset to Orange County*, which is an increase from 43% in 2017. Another third (37%) feel JWA facilities are *good and meet their needs*, a decrease from 47% in 2017. Ten percent of passengers don't have any strong feelings about JWA, same as in 2017.

More OC residents than visitors say JWA provides *excellent service* (67% vs 46%), while more visitors than residents say its services are *good* (40% vs 27%) or *do not have strong feelings* (13% vs 3%).

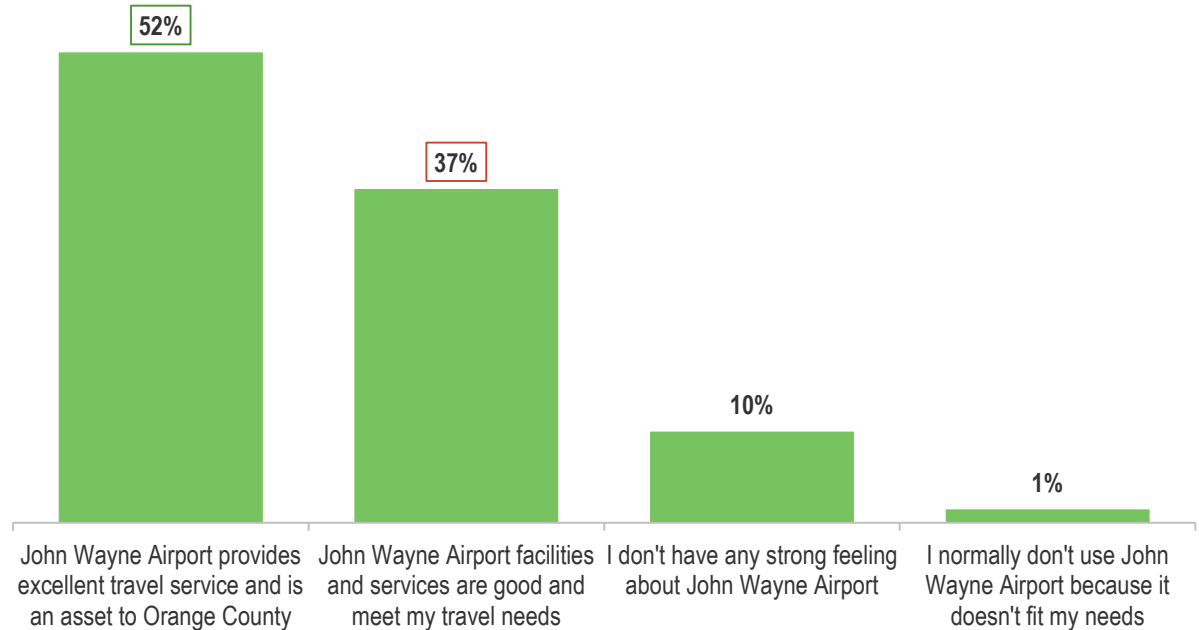
More male passengers than female passengers rate JWA services as *excellent* (57% vs 48%).

Base size: 2019=599 (weighted); 2017=410 Q30. In terms of your views about John Wayne Airport, which one of the following statements would you most agree with?



Attitudes about John Wayne Airport

Among All Passengers



This year's data is compared to data collected in 2017 at the 95% confidence level. Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

Among passengers, John Wayne Airport has a Net Promoter Score of 72, which is considered excellent. This year there are significantly less promoters (76% vs 81%) and more passives (20% vs 15%) compared to 2017.

More passengers who are Orange County residents than visitors are promoters of John Wayne Airport (82% vs 74%).

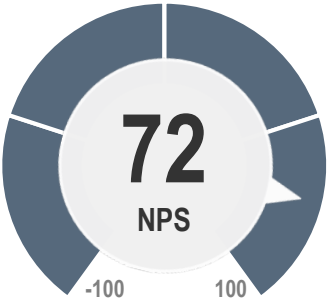
- According to the Net Promoter framework, customers can be categorized into one of three groups: Promoters, Passives, and Detractors.
- Promoters are viewed as valuable assets that drive profitable growth because of their repeat/increased usage, longevity and referrals.
- Detractors are seen as liabilities that destroy profitable growth because of their complaints, reduced usage/defection and negative word-of-mouth.
- Net Promoter Score is obtained by asking one single question (i.e., likelihood to recommend) and subtracting the percent of Detractors from the percent of Promoters.
- Proponents of the Net Promoter approach claim that an organization's relative Net Promoter Score (its score relative to competitors) correlates with revenue growth relative to competitors.

Base size: 2019=599 (weighted); 2017=410

Q41. Based on your overall experience at the airport, how likely would you be to recommend John Wayne Airport to others?



Net Promoter Score Among All Passengers



Promoters (9-10 Rating) – Detractors (0-6 Rating) = Net Promoter Score (NPS)

PROMOTERS	PASSIVES	DETRACTORS
76%	20%	4%

Net Promoter, NPS, and Net Promoter Score are trademarks of Satmetrix Systems, Inc., Bain & Company, and Fred Reichheld

This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

The most-used source of information about John Wayne Airport is *airline/airport websites*, and has significantly increased since 2017 (38% vs 29%).

Since 2017 there has been a decrease in use of *Expedia* (10% vs 17%), *Kayak* (3% vs 8%), *Orbitz* (2% vs 5%), *business associate* (1% vs 5%), *Hotwire* (1% vs 4%), and *Yelp* (<0.5% vs 2%) as sources of information.

Orange County residents are more likely than visitors to use *airline/airport websites* (46% vs 36%), *Kayak* (7% vs 2%), or *local newspaper* (4% vs 0%) while visitors are more likely to rely on a *relative or friend* (10% vs 5%).

Business travelers are more likely than leisure travelers to rely on *corporate travel planners* (8% vs 0%) or *business associates* (3% vs 1%), while leisure passengers are more likely to use *Expedia* (12% vs 5%), *relative/friend* (10% vs 4%), or *Travelocity* (6% vs 1%).

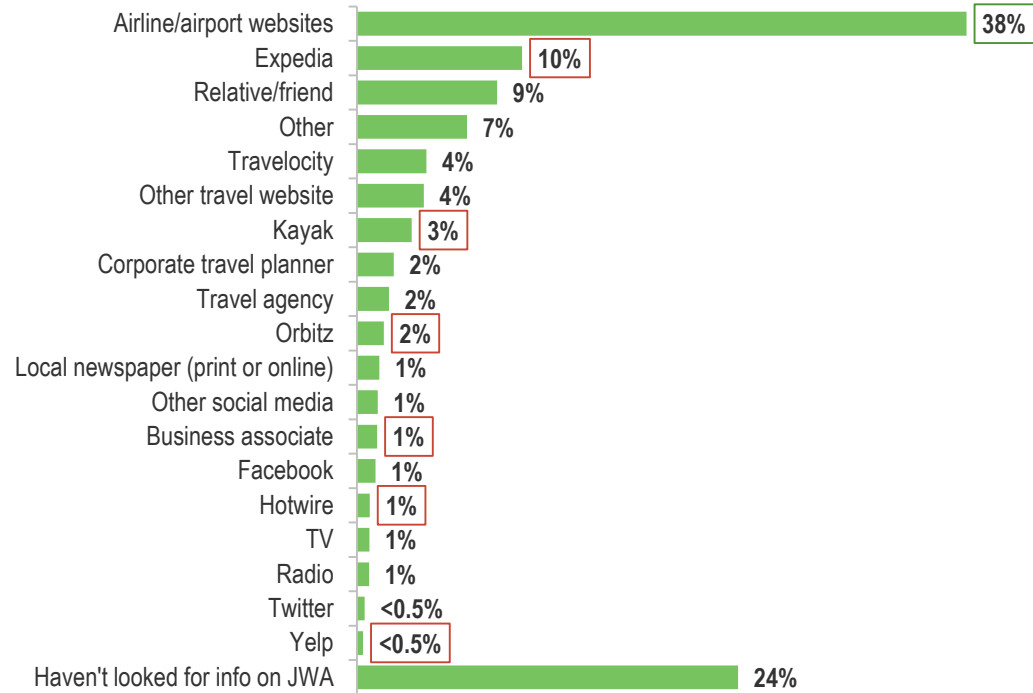
Female passengers are more likely to rely on a *friend/relative* (11% vs 5%) while male passengers are more likely to use a *corporate travel planner* (4% vs 1%).

Base size: 2019=599 (weighted); 2017=410

Q18. What sources of information do you rely upon for information on John Wayne Airport? Select all that apply.



Sources of Information about John Wayne Airport Among All Passengers



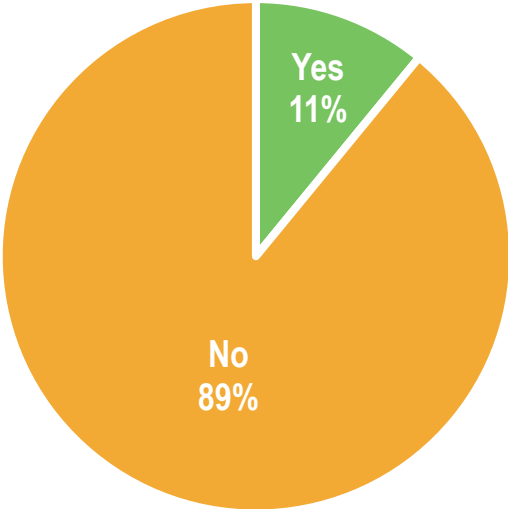
This year's data is compared to data collected in 2017 at the 95% confidence level. Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

About one in ten passengers (11%) surveyed said they visited the John Wayne Airport website for their current trip, which is not significantly different from 2017 (9%).



Website Visits Before Current Trip

Among All Passengers



Base size: 2019=599 (weighted); 2017=410
Q20. Did you visit the website for John Wayne Airport for this trip?

This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

Nine in ten passengers who visited the JWA website report being able to find the information they needed. Two percent did not, and 11% could not recall. There are no significant changes in these results since 2017.

Note that the base size in 2017 was low (n=37).

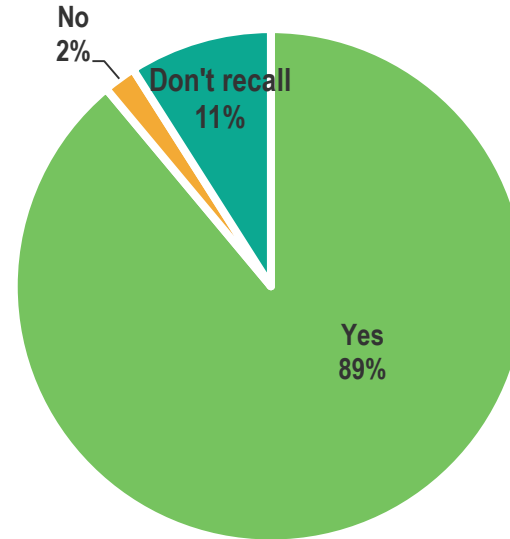
Base size: 2019=66 (weighted), 2017=37

Q21. Did you find the information you needed on the website?



Found Needed Information on Website

Among Passengers Who Visited JWA Website Before Current Trip



This year's data is compared to data collected in 2017 at the 95% confidence level. Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

Passengers who visited the JWA website were asked what additional information they would like to see on the site. Most responses were related to wayfinding (map/floor plan/layout, amenities, restaurants).

Base size: n=66 (weighted)

Q22. What additional information would you like to see on the website?



Additional Information Wanted on Website

Among Passengers Who Visited JWA Website Before Current Trip

Verbatim Responses:

- A food map
- Amenities
- Available amenities
- Easier accessibility to Wi-Fi
- flight info
- Floor plan /map of airport terminal services, gates, restaurants, etc.
- Layout of the airport
- More restaurants
- More TSA info
- Is transportation available from rental return to terminal c - and how long of a walk should be anticipated
- Restaurants and store listing
- Traffic updates
- Weather (x2)
- Where the dispensaries in the area are located

Open-end responses from this year are not compared to responses from 2017.

The top reason passengers give for choosing JWA for their flight is *location/proximity to their home or destination*, cited by 72% of passengers, which is a significant increase from 63% in 2017. Significantly less passengers this year compared to 2017 chose JWA because the *trip was planned by corporate or family planner* (6% vs 14%).

More Orange County residents than visitors chose JWA because of *convenient location* (84% vs 67%), while more visitors chose JWA for *cost/affordability* (7% vs 1%).

More business travelers than leisure travelers picked JWA because the *trip was planned by a corporate or family planner* (13% vs 4%).

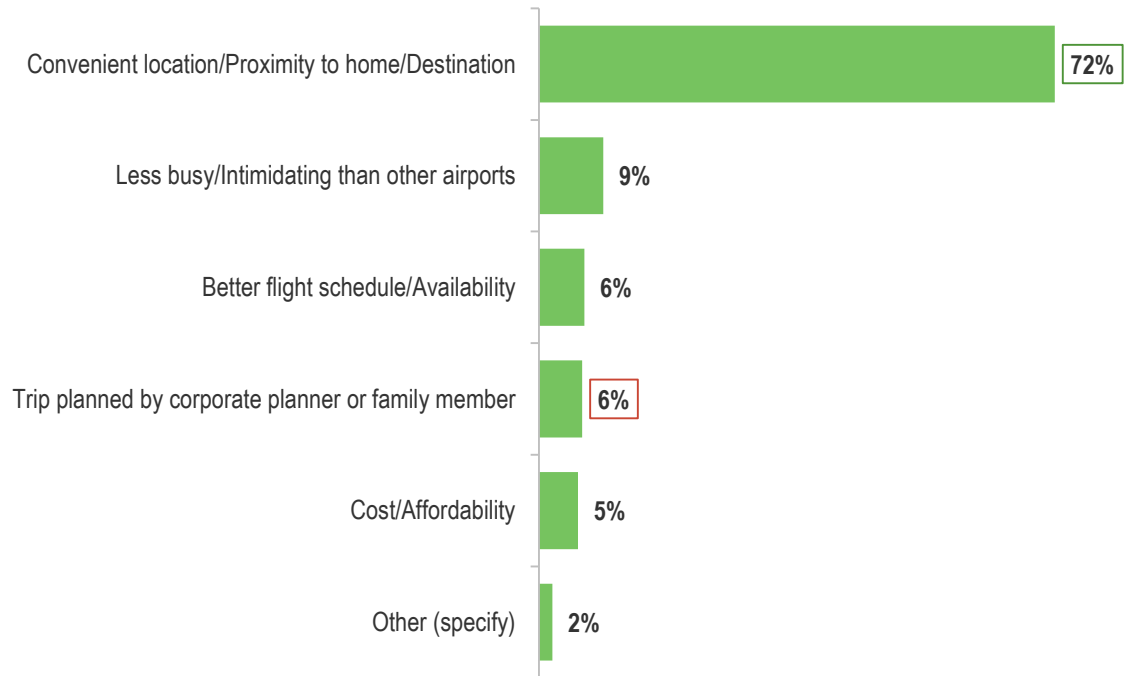
More female passengers chose JWA because of *convenient location* (75% vs 67%) while more male passengers chose JWA because *trip was planned by a corporate or family planner* (8% vs 4%).

Base size: 2019=599 (weighted); 2017=410

Q23. What is the primary reason you chose John Wayne Airport for travel today?



Reason for Choosing John Wayne Airport Among All Passengers



This year's data is compared to data collected in 2017 at the 95% confidence level. Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

The top reason passengers give for choosing airports other than JWA is because of location, cited by one third (34%) of passengers. There was an increase in passengers this year compared to 2017 choosing other airports because of *flight schedule/availability* (21% vs 11%), and because of *variety of international connections* (5% vs 2%). There was a decrease in choosing other airports because *travel was planned by corporate or family planner* (3% vs 9%) and less passengers this year compared to 2017 *had never used another Southern California airports* (8% vs 13%).

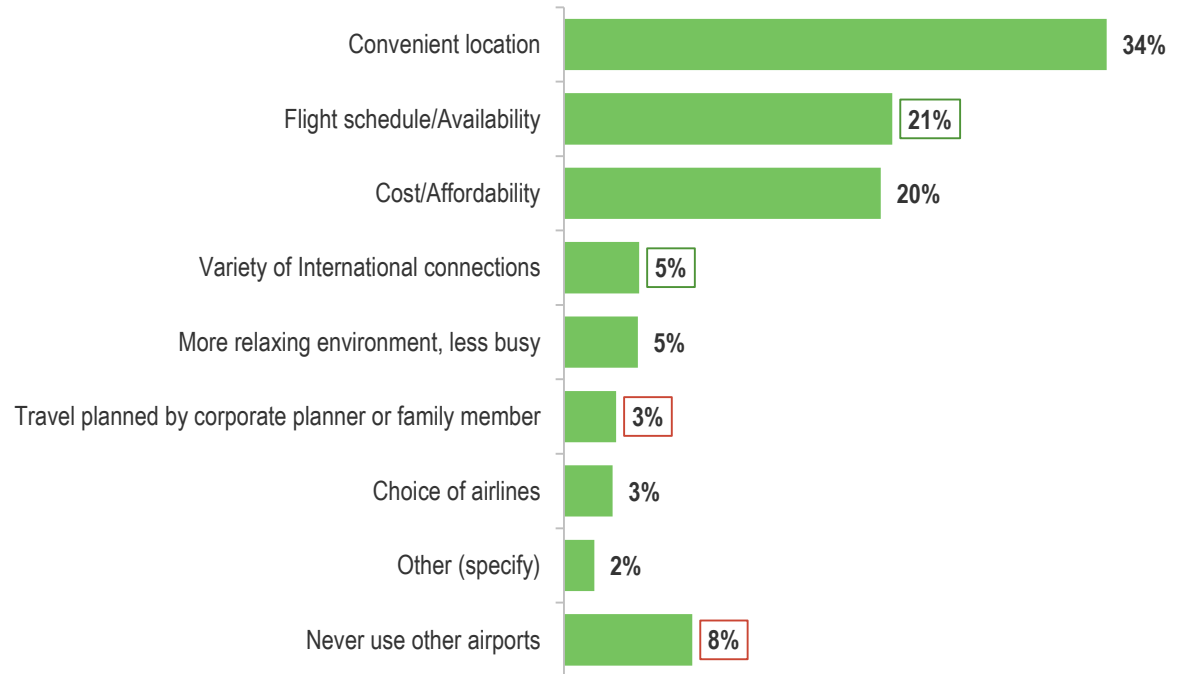
Residents of Orange County were more likely than visitors to choose other airports because of *flight schedule/availability* (32% vs 17%) or *variety of international connections* (14% vs 1%), while visitors were more likely to choose other airports because of *convenient location* (40% vs 17%).

Business travelers were more likely than leisure travelers to choose other airports because *travel was planned by corporate or family planner* (8% vs 2%).

Base size: 2019=599 (weighted); 2017=410
Q24. When you choose to use airports other than John Wayne Airport for Southern California travel, what is your primary reason for doing so?



Reasons for Choosing Other Airports Among All Passengers



This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

Among those who use airports other than JWA, *LAX* is by far the most-used at about two thirds, which is not significantly different from 2017 (69% vs 65%).

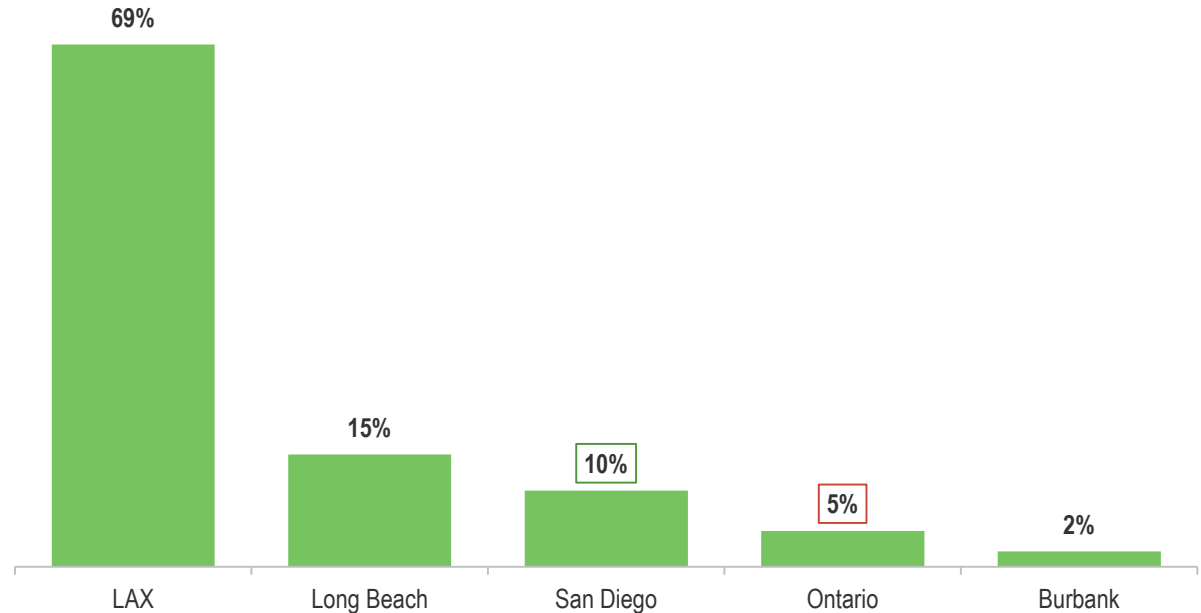
There was a significant increase this year in *San Diego* (10% vs 5%) and a significant decrease in use of *Ontario* (5% vs 9%) compared to 2017.

Residents of Orange County were more likely than visitors to have used *LAX* (77% vs 64%), while visitors were more likely than OC residents to have used *San Diego* (13% vs 4%).

Base size: 2019=441 (weighted), 2017=256
Q25. What other airport do you use most often?



Other Airport Used Most Often Among Passengers that Use Other Airports



This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

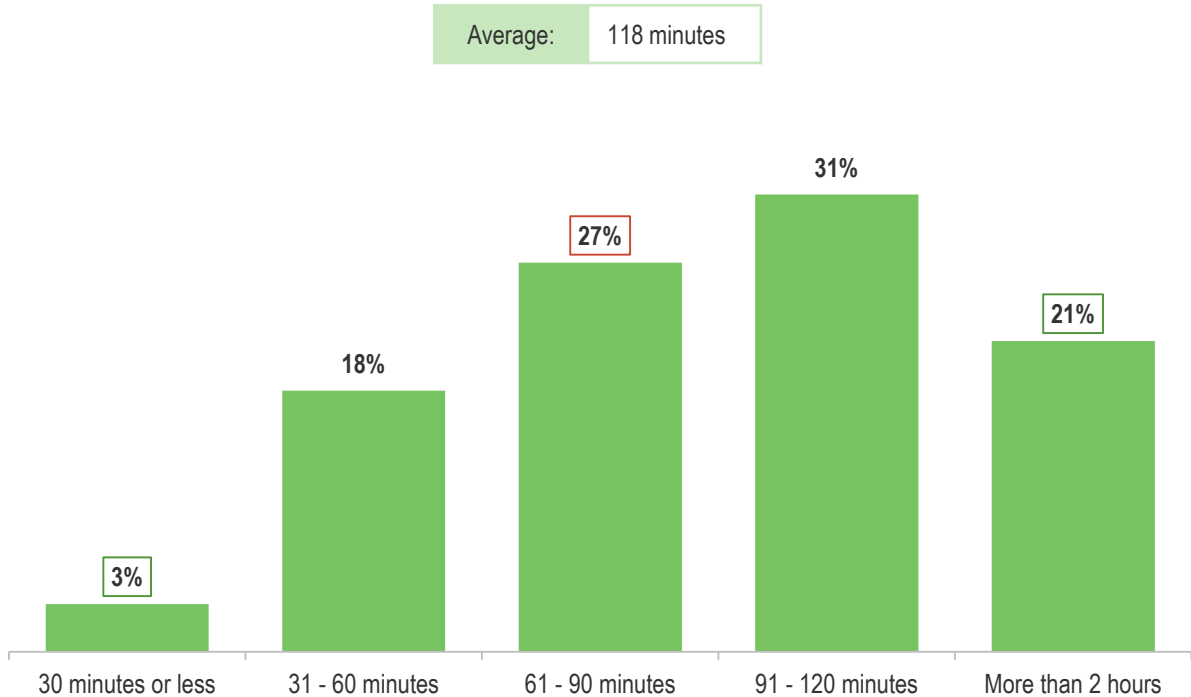
Passengers arrived an average of two hours before the scheduled departure of their flight. There is no significant difference in the average arrival time compared to 2017, but this year there was an increase in passengers arriving 30 minutes or less (3% vs 1%) or more than 2 hours (21% vs 11%) before their flight, and less arrived between 61-90 minutes (27% vs 37%).

Visitors tend to arrive earlier than Orange County residents (128 vs 88 minutes), leisure travelers arrive earlier than business travelers (124 vs 99 minutes), and female passengers are more likely than male passengers to arrive earlier (123 vs 109 minutes).

Base size: 2019=599 (weighted); 2017=410
Q26. How many MINUTES before the scheduled departure of your flight did you arrive at our airport?



Arrival Time Before Flight Departure Among All Passengers



This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by green (significantly higher) or red (significantly lower) highlighting

Passengers were asked to select the method of transportation they used to arrive at JWA on the day of their flight. The majority of passengers were dropped off by *Uber/Lyft/Wingz*, which is an increase compared to 2017 (32% vs 22%), when the majority were *dropped off by private auto* (40% vs 24%). There was also an increase this year in passengers *driving themselves in a private car* (14% vs 9%). Use of public transportation decreased (<0.5% vs 2%).

More OC residents than visitors were *dropped off* (34% vs 21%) or *drove* (28% vs 9%), while more visitors arrived by *rental car* (25% vs 1%) or *door-to-door airport shuttle* (4% vs 0%).

More business travelers arrived by *rental car* (26% vs 17%) or *hotel/motel shuttle* (7% vs 2%), and more leisure travelers were *dropped off* (27% vs 15%).

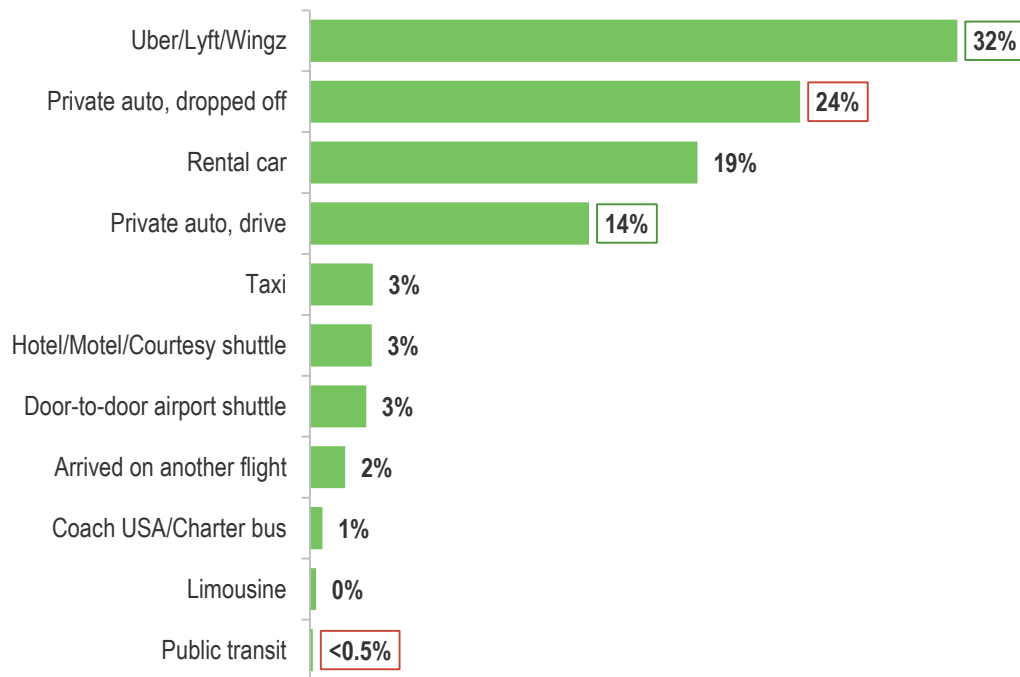
More male passengers *drove* (18% vs 11%) and more female passengers were *dropped off* (27% vs 20%).

Base size: 2019=599 (weighted); 2017=410

Q9. How did you get to the airport today?



Transportation to the Airport Among All Passengers



This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

Passengers who arrived via Uber/Lyft/Wingz were asked to give their reasons for selecting rideshare service.

The top reason, given by nearly half of rideshare users, was the ease/convenience. The second most given reason, cited by about one third, was the cost/affordability of the service. Other reasons include speed and not having a ride/not wanting to inconvenience friends/family to drive.

Base size: n=199 (unweighted)

Q10. Why did you choose to use Uber/Lyft/Wingz to get to the airport today?



Reason for Choosing Rideshare

Among Passengers Arriving via Uber/Lyft/Wingz

Verbatim Responses (coded):

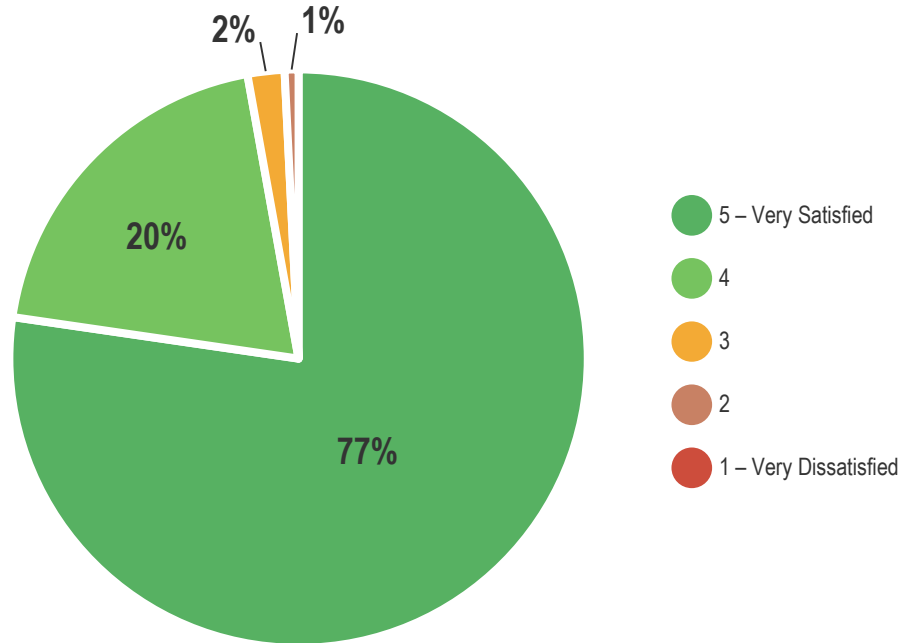
- Easy / Easiest / Convenient (60%)
- Cost / Affordable / Cheapest (21%)
- Fast / Quickest (8%)
- Don't have a car / Didn't want to drive (7%)
- Didn't want to inconvenience friends (4%)
- Always use rideshare (3%)
- Company pays / requires (3%)

Open-end responses from this year are not compared to responses from 2017.

Nearly all rideshare users were satisfied (Top 2 Box) with the service getting them to the airport, which is a significant increase compared to 2017 (97% vs 90%).



Satisfaction with Rideshare Service Among Passengers Arriving via Uber/Lyft/Wingz



Base size: 2019=190 (weighted), 2017=91

Q10a. Using a scale of 1 to 5 where 1 is Very Dissatisfied and 5 is Very Satisfied how would you rate their service getting you to the airport today?

This year's data is compared to data collected in 2017 at the 95% confidence level. Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

Just under half of passengers who drove a private vehicle to the airport reported parking at the airport. This is not significantly different compared to passengers in 2017.

Note that the base size in 2017 was low (n=37).

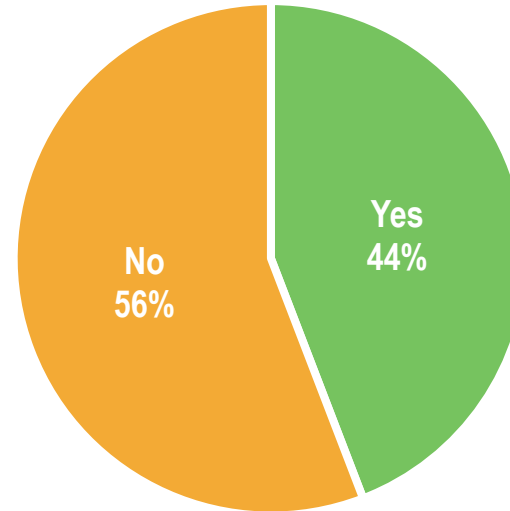
Base size: 2019=82 (weighted), 2017=37

Q11. Did you park your vehicle at the airport today?



Parking at Airport

Among Passengers Arriving via Private Auto, Drive



This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

The base size for this question is extremely low, and caution should be used when drawing conclusions from these results.

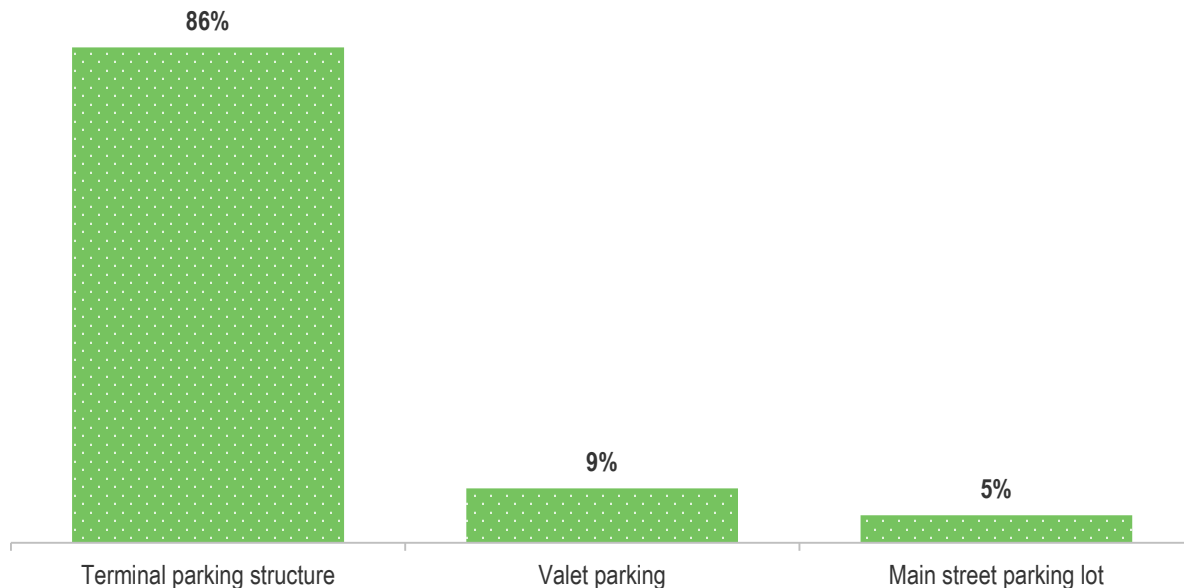
The vast majority of passengers that parked their car at the airport parked in the *terminal parking structure*.

There is no significant difference in parking location this year compared to 2017.



Parking Option Chosen

Among Passengers Arriving by Car & Parked at Airport



This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

* Very low base sizes

Base size: 2019=36 (weighted), 2017=20

Q12. Which parking option did you choose?

The base size for this question is extremely low, and caution should be used when drawing conclusions from these results.

The main reason given by passengers who parked their car at the airport for choosing their parking option was for *convenience*.

There is no significant difference in reason for parking choices this year compared to 2017.

* Very low base sizes

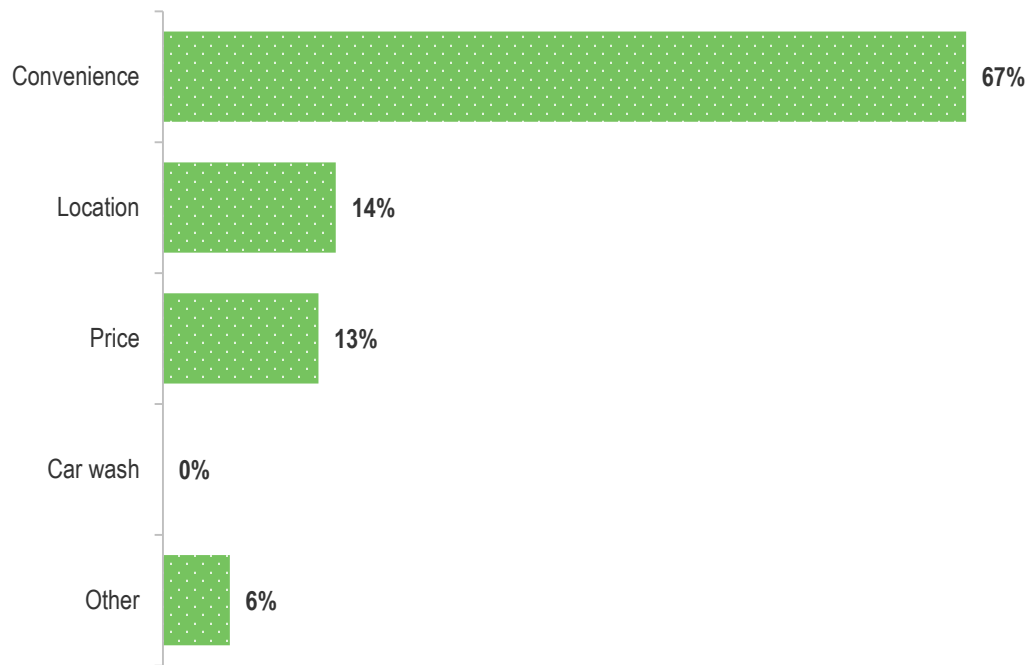
Base size: 2019=36 (weighted), 2017=20

Q13. Why did you choose that parking option?



Reason for Choosing Parking Option

Among Passengers Arriving by Car & Parked at Airport



This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

The majority of passengers obtained their boarding passes on a *mobile phone app*, which is a significant increase from 2017 (40% vs 23%), when the majority used an *automated kiosk* (26% vs 39%).

More Orange County residents than visitors used a *mobile phone app* (47% vs 38%), while visitors were more likely than residents to use an *automated kiosk* (28% vs 19%).

More business travelers than leisure travelers used a *mobile phone app* (54% vs 36%), while leisure travelers are more likely than business travelers to have *printed their boarding pass before arriving* (15% vs 8%).

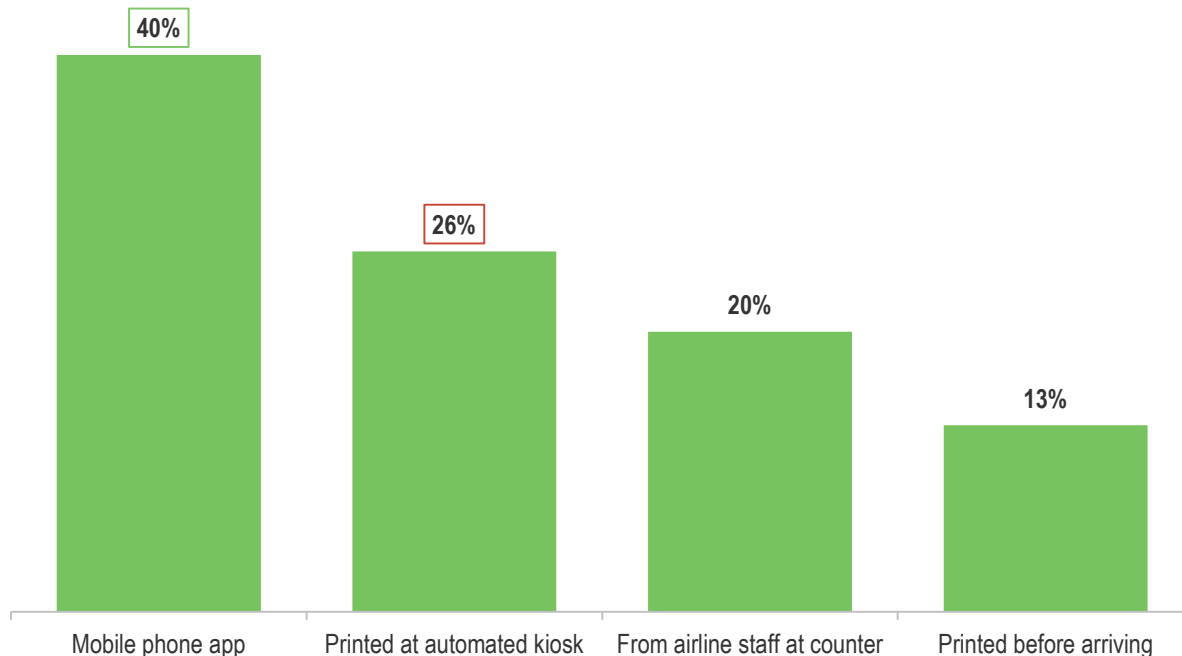
Male passengers were more likely than female passengers to have used a *mobile phone app* (45% vs 37%).

Base size: 2019=599 (weighted); 2017=410

Q16. How did you get your boarding pass today?



Check-In Method Among All Passengers



This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

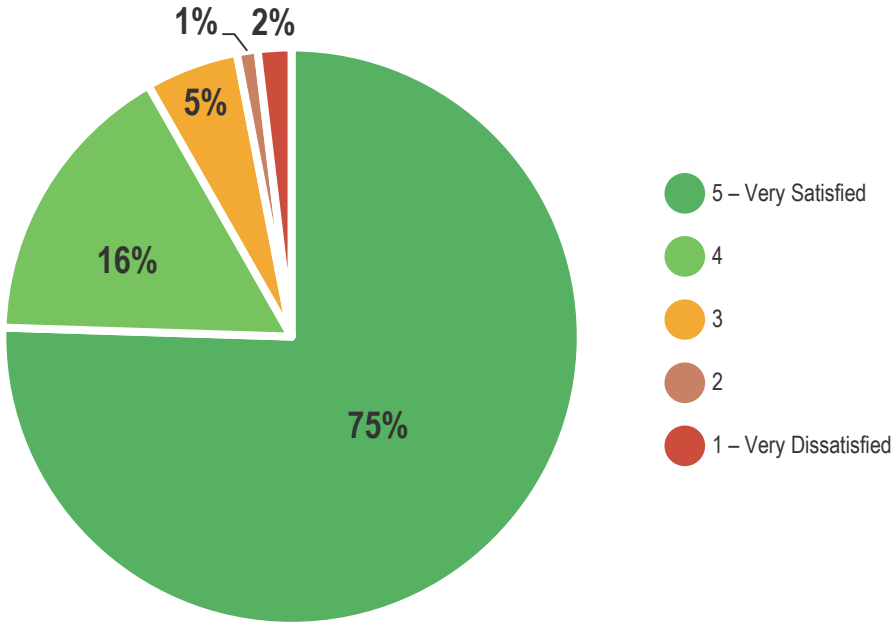
Over nine in ten passengers who checked in at an automated kiosk were satisfied (Top 2 Box) with the ease of use of the kiosk.

There was no change in passenger satisfaction this year compared to 2017.



Satisfaction with Automated Kiosk

Among Passengers Who Checked in at Automated Kiosk



Base size: 2019=156 (weighted), 2017-161
Q17. Using our 5-point scale where 1 is Very Dissatisfied and 5 is Very Satisfied how would you rate the automated kiosk for ease of use?

This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

Three in five passengers surveyed report making a food or beverage purchase while at the airport, which is a significant increase compared to 2017 (59% vs 52%).

Seventeen percent of passengers surveyed report making a purchase of magazines, gifts, or other items while at the airport, which is not significantly different compared to 2017 (17% vs 13%).

More visitors than passengers who are Orange County residents made a food or beverage purchase at the airport (62% vs 52%). Likewise visitors were more likely to make a retail purchase (19% vs 10%).

More female passengers than male passengers made a food or beverage purchase (63% vs 53%). Female passengers were also more likely to make a retail purchase (20% vs 12%).

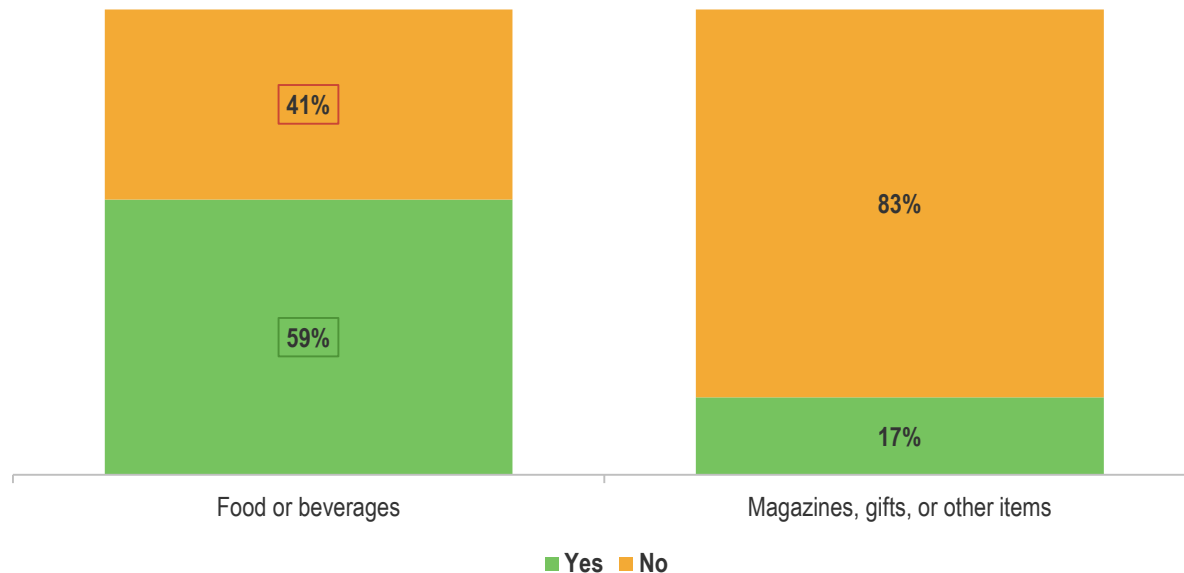
Base size: 2019=599 (weighted); 2017=410

Q31. Have you purchased any food or beverages while at the airport today?

Q32. Have you purchased any magazines, gifts, or other items at any of the stores at John Wayne Airport today?



Purchases Among All Passengers



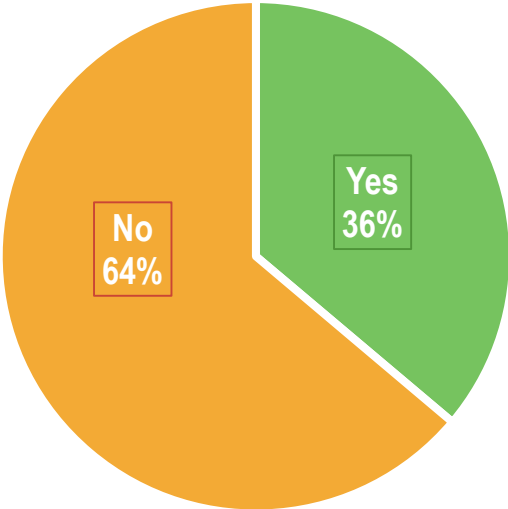
This year's data is compared to data collected in 2017 at the 95% confidence level. Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

Passengers were asked if they had used or tried to use the Wi-Fi while at the airport. One third of passengers said they had used or tried to use the Wi-Fi service, which is a significant increase since 2017 (36% vs 26%).



Use of Wi-Fi

Among All Passengers



Base size: 2019=599 (weighted); 2017=410
Q37. Have you used (or tried to use) the Wi-Fi at John Wayne Airport today?

This year's data is compared to data collected in 2017 at the 95% confidence level. Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

Passengers who had used or tried to use the Wi-Fi were asked how satisfied they were with the service. Four in five were satisfied (giving a rating of 4 or 5 on a 5-point scale), which is a significant increase compared to 2017 (79% vs 65%).

Four percent were dissatisfied (giving a rating of 1 or 2) with the Wi-Fi service, which is significantly less than in 2017 (4% vs 17%).

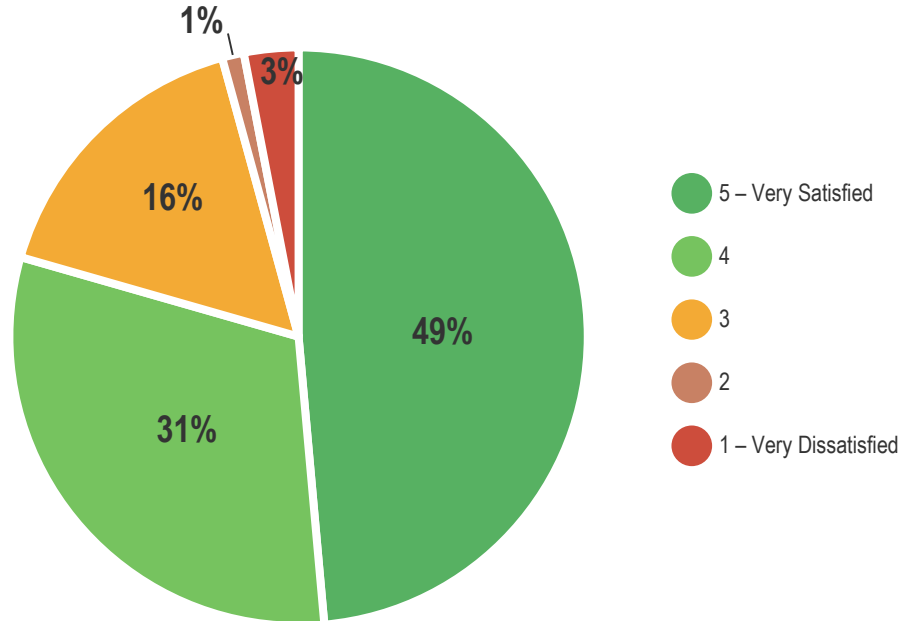
Leisure passengers are significantly more satisfied than business travelers with the Wi-Fi service (83% vs 68%).

Base size: 2019=217 (weighted), 2017=107
Q38 How satisfied are you with the Wi-Fi service? Please use a 1 to 5 scale where 1 is Very Dissatisfied and 5 is Very Satisfied.



Satisfaction with Wi-Fi

Among Passengers Who Used/Tried to Use Wi-Fi



This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

Passengers who gave a positive (Top 2 Box - rating 4 or 5 on a 5-point scale) score were asked what they liked about the Wi-Fi (they were allowed to select multiple responses). Nearly all reasons were selected more this year compared to 2017. The top three reasons were *finding the free Wi-Fi network* (54% vs 30%), *Wi-Fi speed* (48% vs 35%), and *Wi-Fi reliability* (46% vs 17%).

Note: Passengers who have a negative (Bottom 2 Box) rating were asked what they disliked, but base size is too low (n=9) for results to be reported.

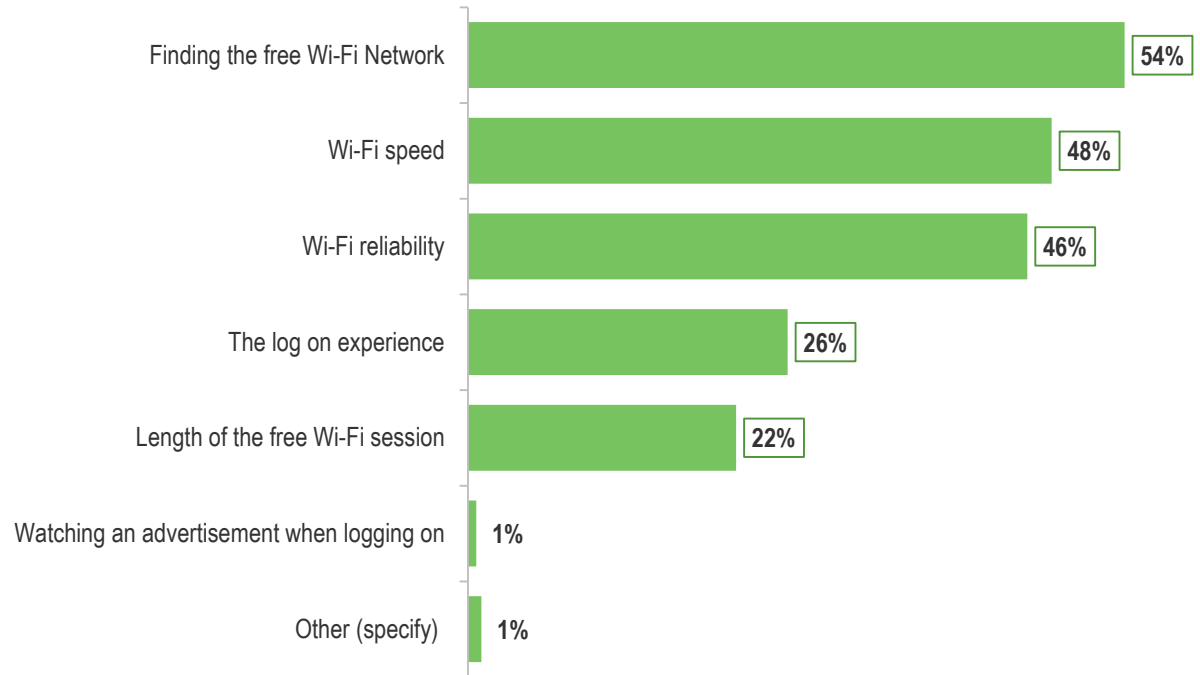
Base size: 2019=172 (weighted), 2017=107

Q39a. What did you like about your Wi-Fi experience? Select all that apply.



Reasons for Satisfaction with Wi-Fi

Among Passengers Giving a Positive Rating (4 or 5)



This year's data is compared to data collected in 2017 at the 95% confidence level. Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

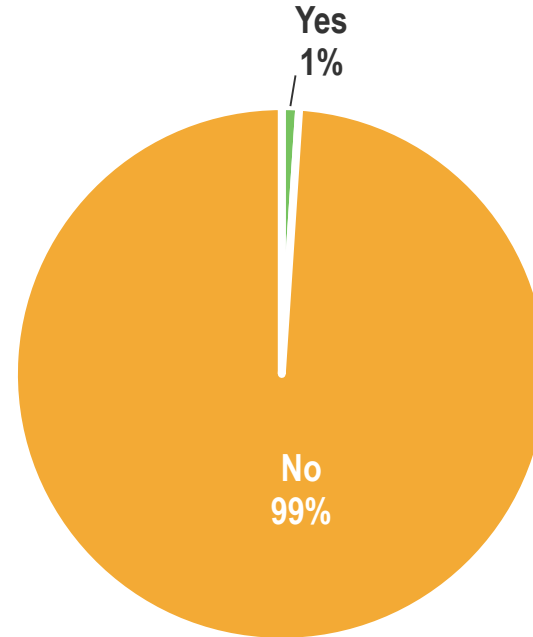
Only 1% of passengers surveyed reported visiting or planning to visit the USO lounge while they were at the airport. There is no significant change in USO Lounge use by passengers this year compared to 2017.

Base size: n=410

Q15. Did you or will you visit the USO lounge at the airport today?



USO Lounge Visit Among All Passengers



This year's data is compared to data collected in 2017 at the 95% confidence level. Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

Passengers were asked if they would use a lounge similar to airline club lounges with amenities like beverages, light snacks and computer workstations for a nominal fee if it was available at the airport.

Two in five passengers said they would use a lounge, which is a significant increase compared to passengers in 2017 (40% vs 29%).

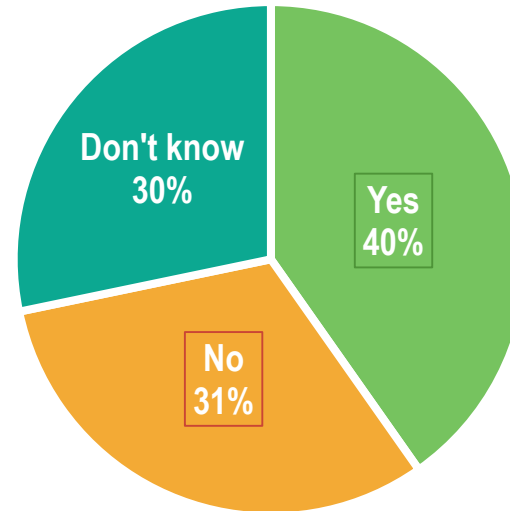
More business travelers than leisure travelers said they would use a lounge (49% vs 37%).

More male than female passengers said they would use a lounge (45% vs 37%).

Base size: 2019=599 (weighted); 2017=410
Q36. If John Wayne Airport offered a post-security lounge similar to airline club lounges with amenities like beverages, light snacks and computer workstations for a nominal fee (e.g., \$10), would you use it?



Interest in Lounge Among All Passengers



This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

Passengers were asked if there were any services or products that they would like to see offered at the airport that are not currently available. One in five passengers said there are services/products they would like to see offered, which is a significant increase compared to 2017 (19% vs 11%).

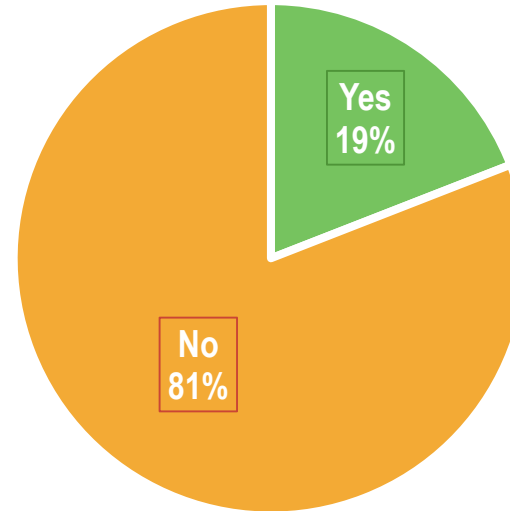
(See next slide for what additional services passengers would like to see)

Base size: 2019=599 (weighted); 2017=410

Q33. Are there any services or products that you would like to see offered at the airport that are not available now?



Desire for Additional Services or Products Among All Passengers



This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

Among passengers who would like to see additional services offered at the airport, the most mentioned item is charging stations/power outlets for electronic devices, followed by more/better/healthier food options.

Base size: n=101 (unweighted)

Q34. What additional services would you like to see?

Q35. Should it be before or after the security checkpoint?



Additional Services

Among Passengers Who Would Like to See Additional Services

Verbatim Responses

After security:

- More charging stations /outlets (x18)
- Lounge (x12)
 - Amex, Delta Sky Club, Centurion, Priority Pass, Admirals, Alaska Airlines
- Smokers lounge (x2)
- Cannabis lounge
- More shopping/retail (x4)
- Nail salon / spa (x4)
- Duty Free shop (x2)
- A proper bookstore with larger selection
- Shoe cleaning
- Sports theme
- Alcohol and cigarettes
- Child play area
- Crafts
- Entertainment exhibits
- Kids souvenirs
- Massage and beer garden
- Free hand wipes (x2)
- More food options (x7)
- Healthier food choices (x4)
- More vegan options (x4)
- More restaurants / variety (x4)
- Better food options (x2)
- Better restaurants (x2)
- Chick-fil-A (x2)
- More bars/restaurants (x2)
- Dunkin Donuts
- Kids restaurant
- More diverse and local food offerings
- Another coffee shop, not Starbucks
- More restaurant options like in n out
- More sit down restaurant choices
- More variety restaurants
- Nicer higher end food and bar
- Able to use airline vouchers in convenience shop. We were told we could but the Hudson News store would not honor them

Before security:

- Shuttle or cart from terminal from terminal; particularly from rental car center to terminal c (to and from)
- Electricity
- More food

Before security/After security:

- More food choices, more affordable choices.

Don't know location/Anywhere:

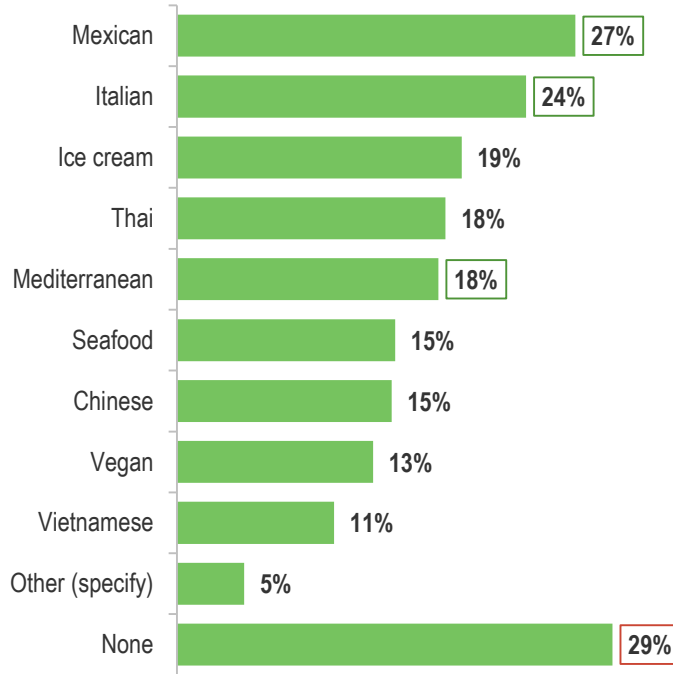
- More local products: California and OC
- UPS

Passengers were asked what types of food venues they would like to see added to John Wayne Airport (they were allowed to select multiple responses). The top desired venues are *Mexican* and *Italian*, both significantly increased from 2017 (27% vs 15% and 24% vs 13%, respectively). The desire for *Mediterranean* also increased significantly since 2017 (18% vs 10%). Three in ten passengers did not want to see any of the food venues listed added, a significant decrease since 2017 (29% vs 40%).

Base size: 2019=599 (weighted); 2017=410
Q42. What type of food venues would you like to see added to JWA? Select all that apply.



Food Venue Additions Desired Among All Passengers



"Other" (verbatim):

- Japanese (x4)
- Filipino (x3)
- Gluten free (x2)
- Healthy options (x2)
- Indian (x2)
- Korean (x2)
- Steakhouse (x2)
- Breakfast
- Burgers
- Coffee
- Coffee, beer
- Keto
- Low carb
- McDonalds
- More easy American
- Polish sausage
- Quality pizza
- Salads
- Sushi
- The impossible burger
- Vegetarian

This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

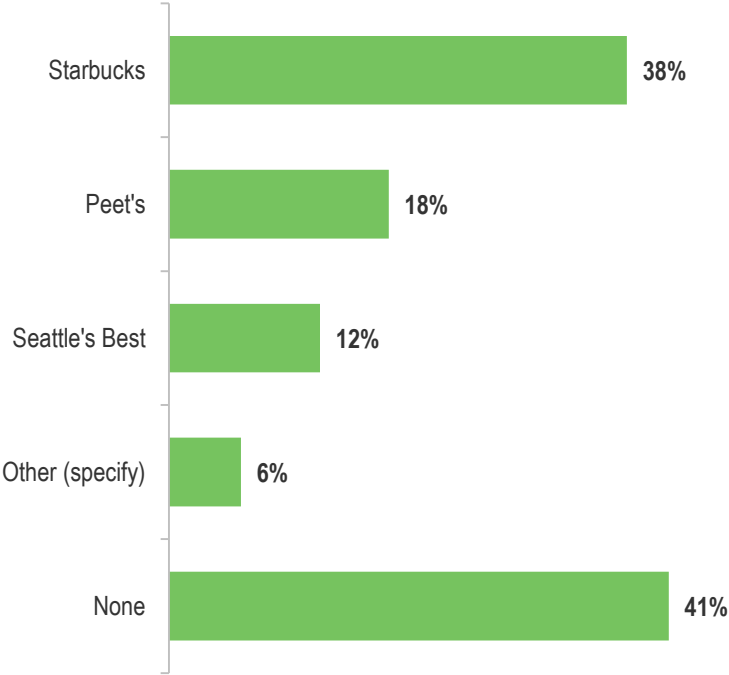
Passengers were asked what brands of coffee they would like to see added to John Wayne Airport (they were allowed to select multiple responses). Over one third want to see *Starbucks*. Two in five did not want to see any of the listed coffee brands added. There is no significant change compared to 2017.

Base size: 2019=599 (weighted); 2017=410
Q43. What brands of coffee would you like to see offered at the airport? Select all that apply.



Coffee Brand Additions Desired

Among All Passengers



- "Other" (verbatim):**
- Dunkin Donuts (x12)
 - Coffee bean (x7)
 - Philz (x5)
 - Caribou (x3)
 - Local brands (x3)
 - Avenue (x2)
 - Khaldi (x2)
 - 7 leaves
 - Bella Rosa
 - Boba tea
 - Café rey
 - Dazbog
 - Dutch Bros
 - Folgers
 - Intelligentsia
 - Tully's

This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

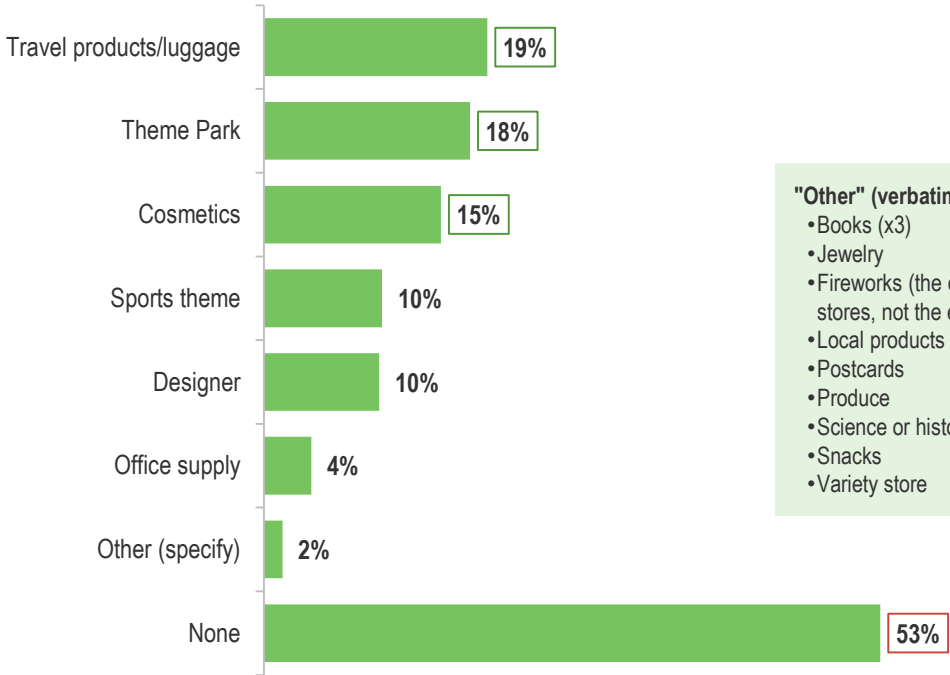
Passengers were asked what types of retail options they would like to see added to John Wayne Airport (they were allowed to select multiple responses). The top three answers are all significant increases since 2017: *Travel products/luggage* (19% vs 10%), *Theme park* (18% vs 11%), and *Cosmetics* (15% vs 8%). About half did not want to see any of the listed retail options added, which is a significant decrease since 2017 (53% vs 62%).

Base size: 2019=599 (weighted); 2017=410
Q44. What types of retail would you like to see added to JWA? Select all that apply.



Retail Additions Desired

Among All Passengers



- "Other" (verbatim):**
- Books (x3)
 - Jewelry
 - Fireworks (the chain of stores, not the explosives)
 - Local products
 - Postcards
 - Produce
 - Science or history
 - Snacks
 - Variety store

This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

Passengers were asked how the rental car experience could be improved (they were allowed to select multiple responses). The top response is the *location of rental cars*, followed by *signage to the rental car location*. There was a significant increase since 2017 in passengers saying *variety of companies/offerings* (5% vs 1%).

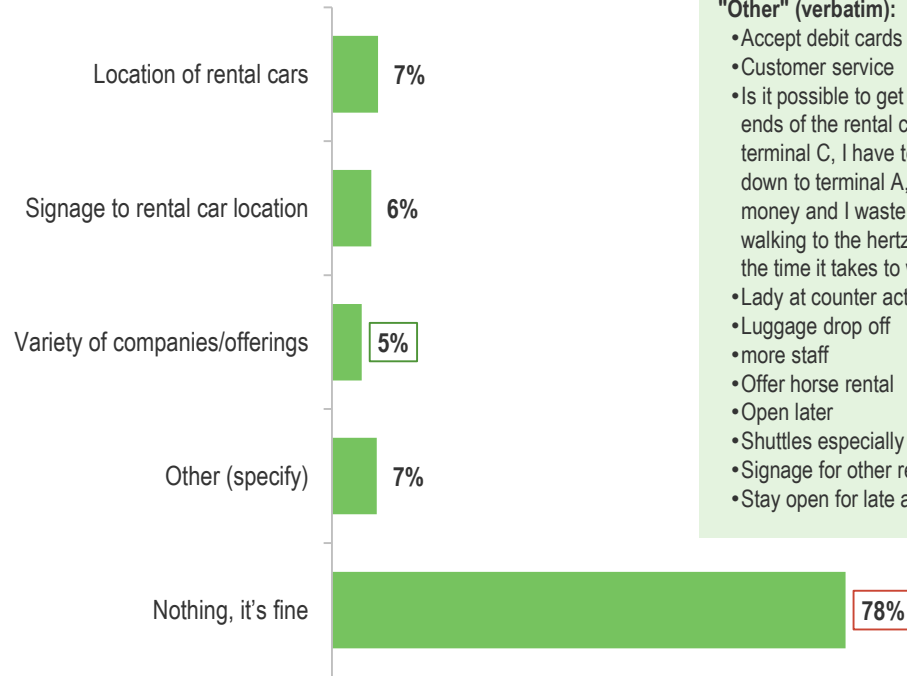
Eight in ten said the rental car experience is fine, and there is nothing that needs to be done to improve, which is a significant decrease since 2017 (78% vs 85%).

Base size: 2019=599 (weighted); 2017=410

Q45. How can we improve your rental car experience? Select all that apply.



Rental Car Experience Improvements Among All Passengers



"Other" (verbatim):

- Accept debit cards
- Customer service
- Is it possible to get rental desks at both ends of the rental car facility's? If I fly into terminal C, I have to walk all the way down to terminal A, to get my car. Time is money and I waste 15 minutes just walking to the hertz desk, not to mention the time it takes to walk to the car itself.
- Lady at counter acted like a bergen
- Luggage drop off
- more staff
- Offer horse rental
- Open later
- Shuttles especially from terminal c
- Signage for other rental car companies
- Stay open for late arriving flights

This year's data is compared to data collected in 2017 at the 95% confidence level. Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

The destination most passengers who are Orange County residents have flown to in the past is *Hawaii*, followed by *Washington DC/Baltimore*. About four in ten indicated they had not flown to any of the listed destinations in the past.

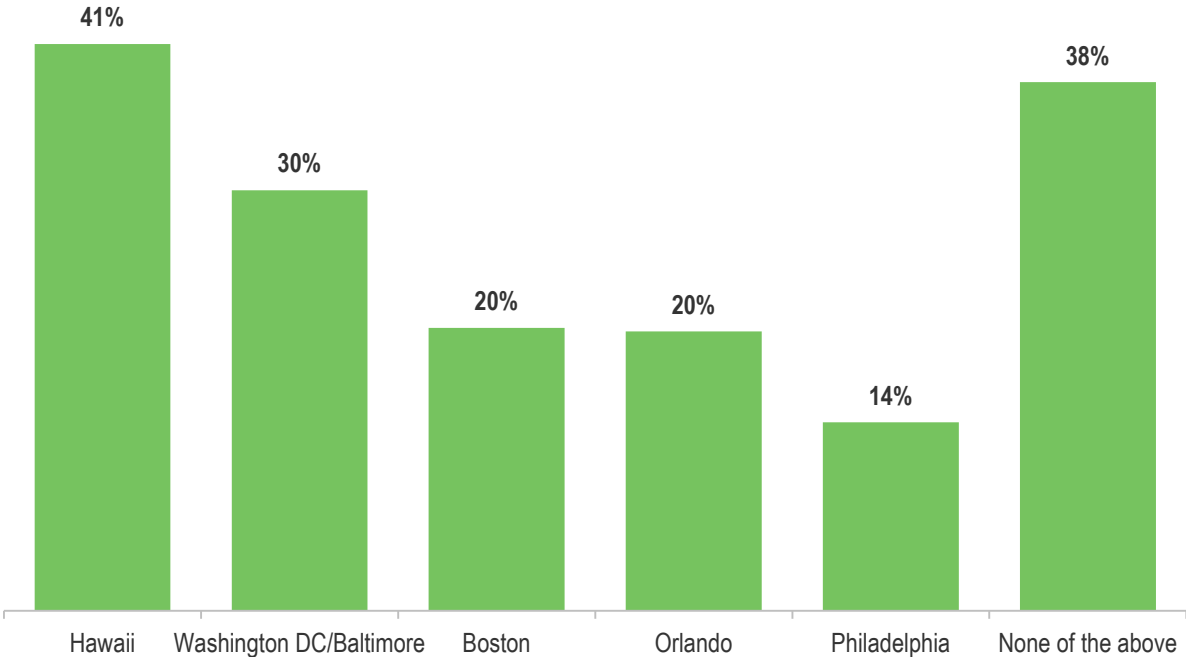
More business travelers than leisure travelers said they had traveled to *Washington DC/Baltimore* (41% vs 24%), *Boston* (30% vs 15%), *Orlando* (30% vs 15%), and *Philadelphia* (27% vs 6%).

Base size: 156 (weighted)
D1. Of the following domestic destinations, please indicate which ones you have flown to in the past.



Domestic Destinations Flown to In The Past

Among Passengers who are Orange County Residents



This question was first asked this year. No comparison can be made to previous years.

Passengers who are Orange County residents are most interested in flying to *Hawaii* out of JWA. About one in five are not interested in any of the listed destinations.

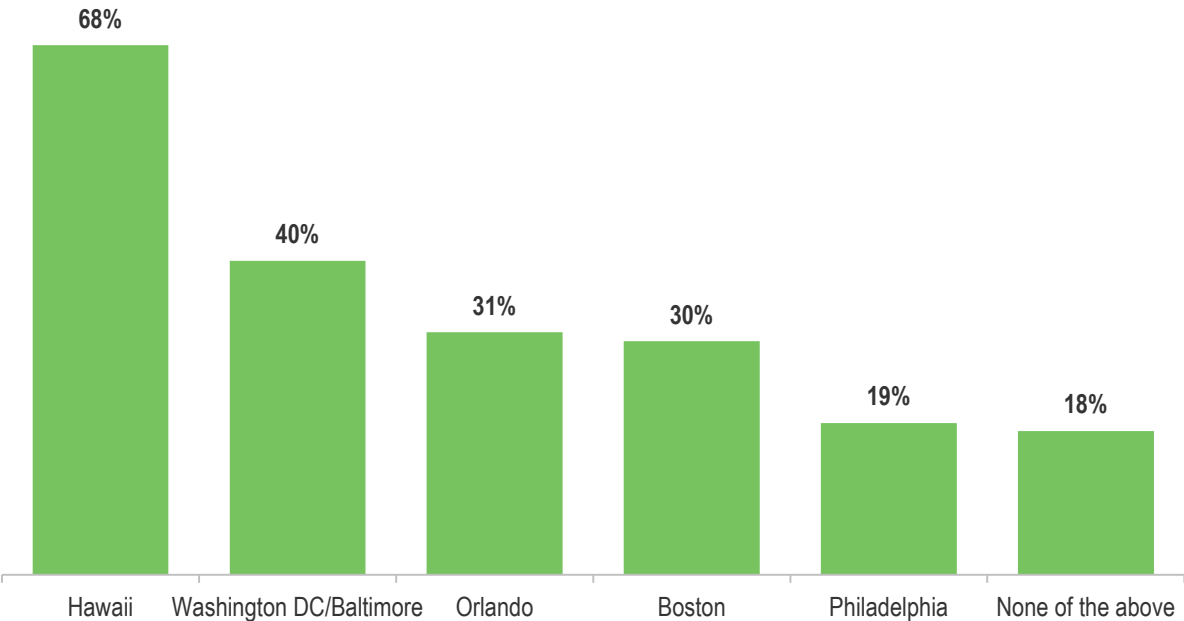
Business travelers are significantly more interested than leisure travelers in *Washington DC/Baltimore, Orlando, and Philadelphia*.

Base size: 156 (weighted)
D2. Please select which destinations you would be interested in flying to out of John Wayne Airport.



Domestic Destinations Interested in Flying To From JWA

Among Passengers who are Orange County Residents



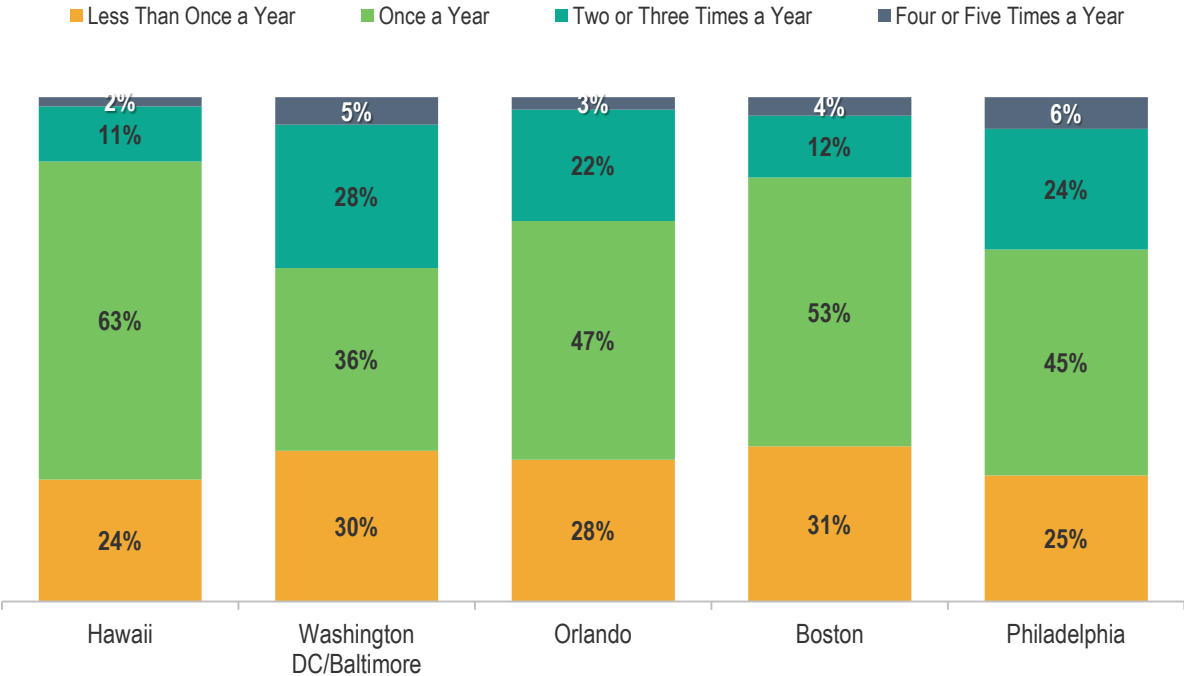
This question was first asked this year. No comparison can be made to previous years.

Among those interested in flying to the listed domestic destinations, most indicated would fly to these destinations once a year or less than once a year. *Washington DC/Baltimore* and *Philadelphia* have the highest potential for multiple flights in a year.



Potential Frequency of Flying to Domestic Destinations of Interest

Among OC Resident Passengers Interested in Flying to Each Destination from JWA



Base sizes vary by destination
D3. How often do you think you would fly out of John Wayne Airport to each of these domestic destinations, if it were a direct non-stop flight?

This question was first asked this year. No comparison can be made to previous years.

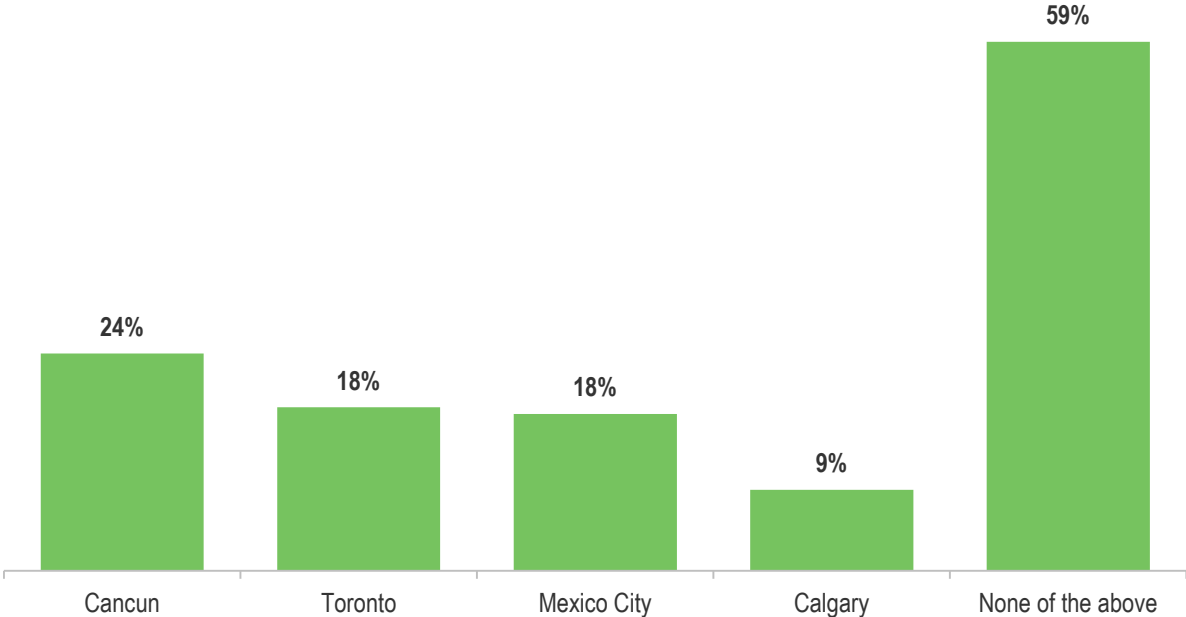
The destination most passengers who are Orange County residents have flown to in the past is *Cancun*, followed by *Toronto* and *Mexico City*. Three in five indicated they had not flown to any of the listed destinations in the past.

More business travelers than leisure travelers said they had flown to *Cancun* (34% vs 18%).



International Destinations Flown to In The Past

Among Passengers who are Orange County Residents



Base size: 156 (weighted)

D4. Of the following international destinations, please indicate which ones you have flown to in the past.

This question was first asked this year. No comparison can be made to previous years.

Passengers who are Orange County residents are most interested in flying to *Cancun* out of JWA. A little over one third are not interested in any of the listed destinations.

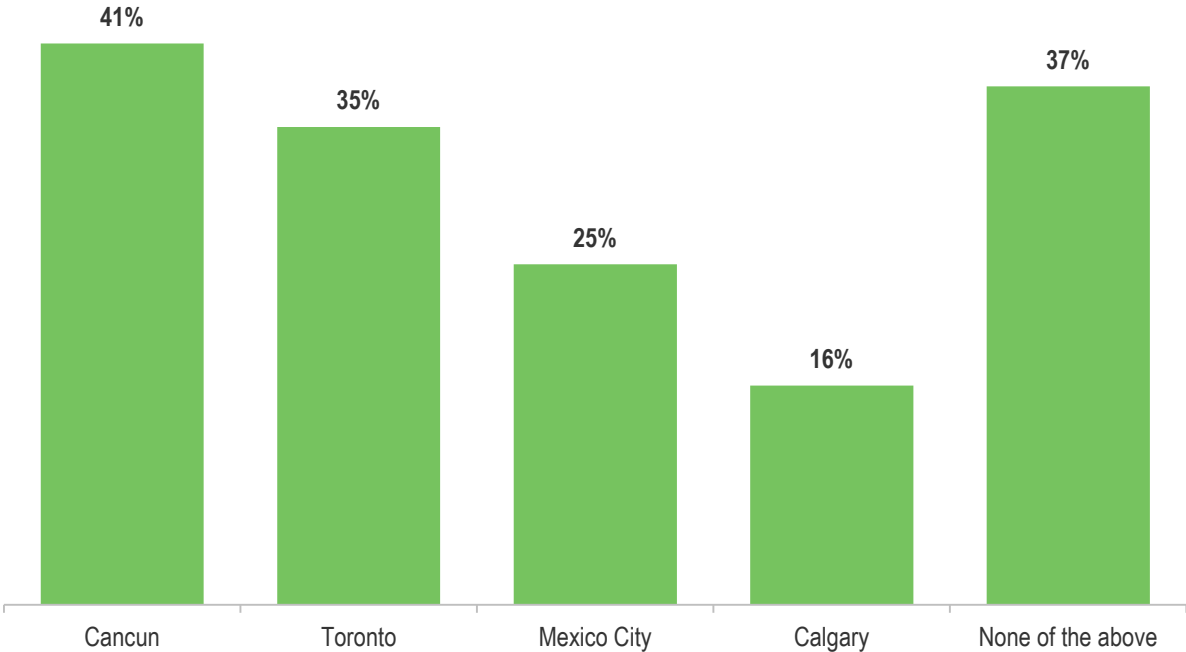
Business travelers are significantly more interested than leisure travelers in *Cancun*.

Base size: 156 (weighted)
D5. Please select which destinations you would be interested in flying to out of John Wayne Airport.



International Destinations Interested in Flying To From JWA

Among Passengers who are Orange County Residents



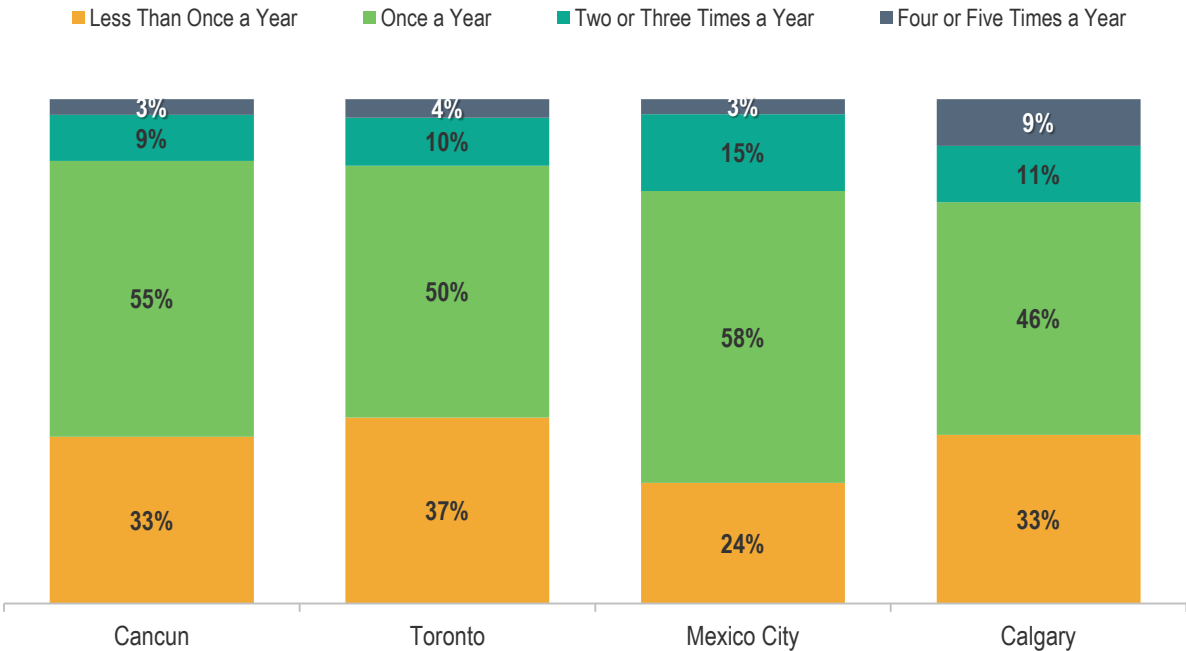
This question was first asked this year. No comparison can be made to previous years.

Among those interested in flying to the listed international destinations, most indicated would fly to these destinations once a year or less than once a year. *Calgary* has the highest potential for multiple flights in a year.



Potential Frequency to International Destinations of Interest

Among OC Resident Passengers Interested in Flying to Each Destination from JWA



Base sizes vary by destination

D6. How often do you think you would fly out of John Wayne Airport to each of these international destinations, if it were a direct non-stop flight?

This question was first asked this year. No comparison can be made to previous years.



Resident Survey Results



Out of 906 online sample panelists contacted, 585 (65%) had flown by air in the past 12 months. Of those, 409 (70%) had flown out of John Wayne Airport in the past 12 months.

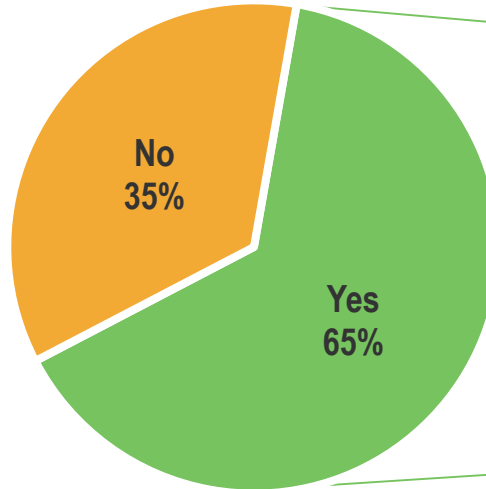
This yields an incidence rate of 45% residents having flown through JWA in the past 12 months among all contacted households in Orange County.



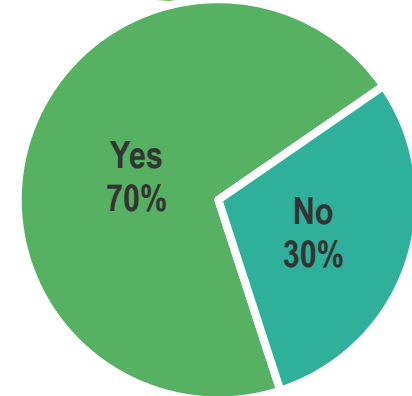
Travel Frequency

Among All Residents

Traveled by Air
Past 12 Months



Flew out of JWA
Past 12 Months



Q3. In the last 12 months, how many round trips have you taken that involved flying?

Q6. How many times have you flown out of John Wayne Airport within the past 12 months?

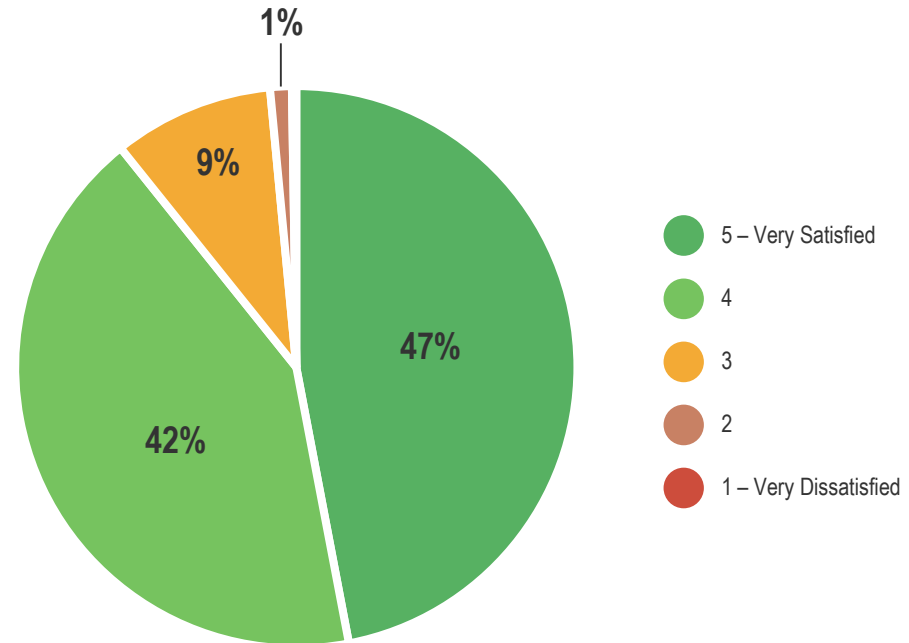
Overall, 89% of residents are satisfied with John Wayne Airport (giving a Top 2 Box score – a rating of 4 or 5 on a 5-point scale). About half (47%) of Orange County residents are very satisfied (rating a 5 out of 5). Only 1% of residents are dissatisfied (giving a Bottom 2 Box score – a rating of 1 or 2). There is no significant difference in satisfaction this year compared to 2017.

Base size: 2019=400, 2017=404

Q21. Now we would like to know how satisfied you are with specific features of John Wayne Airport. Please rate the following items on a 5-point scale where 1 is Very Dissatisfied and 5 is Very Satisfied.



Overall Satisfaction with Airport Among All Residents



This year's data is compared to data collected in 2017 at the 95% confidence level. Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

Residents who said they were satisfied with their experience at John Wayne Airport (rating a 4 or 5 on a 5-point scale) were asked to give their reasons for that score (they were allowed to select multiple reasons).

Convenient location was the most selected reason, followed by *easy* and *clean*.

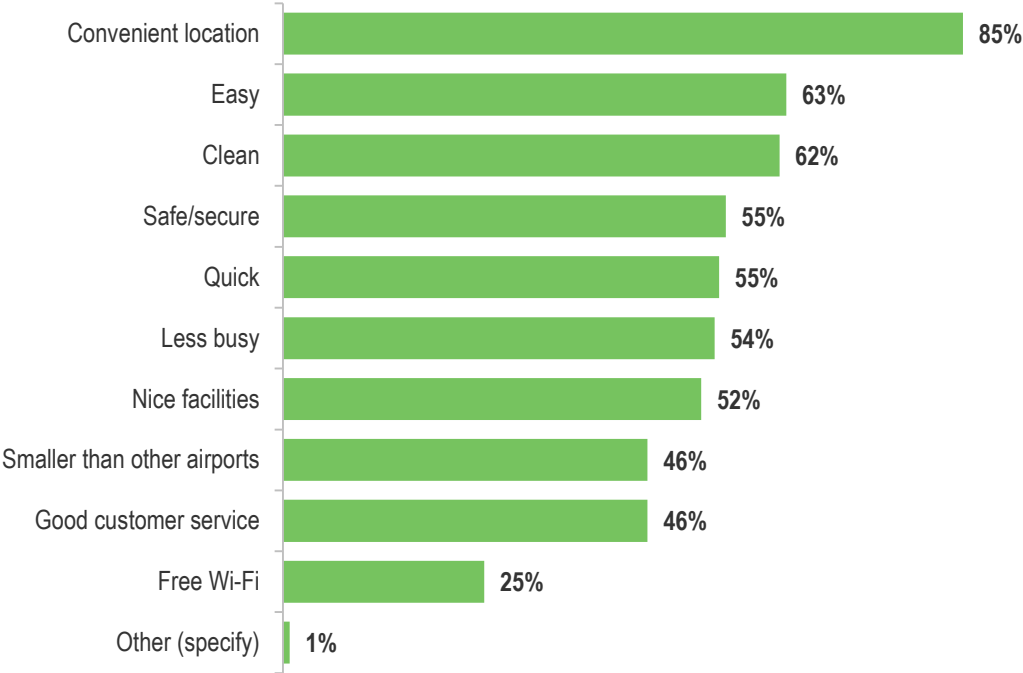
Base size: n=357

Q29. Why did you give JWA an overall rating of [response from Q21]? Select all that apply.



Reasons for High Satisfaction Rating

Among Residents Giving a Positive Rating (4 or 5)



Changed from open-end to multiple choice this year. No comparison can be made to previous years.

Residents are most satisfied with the *cleanliness of airport terminals* and the airport's ability to *make them feel safe and secure in the terminals*. Residents are least satisfied with *parking*.

Residents this year are significantly less satisfied compared to 2017 with the *cleanliness of airport terminals*, *cleanliness of airport parking structures*, and *parking*.

Female residents are significantly more satisfied than male residents with the *security screening process* (80% vs 70%). Male residents are significantly more satisfied than female residents with *airport art exhibits* (72% vs 61%).

Base sizes vary

Q21. Now we would like to know how satisfied you are with specific features of John Wayne Airport. Please rate the following items on a 5-point scale where 1 is Very Dissatisfied and 5 is Very Satisfied.



Satisfaction with Airport Services Among All Residents

Ranked Highest to Lowest for 2019

	2017 (T2B)	2019 (T2B)
Cleanliness of airport terminals	93%	88%
Making you feel safe and secure in the terminals	90%	88%
Overall customer service provided by everyone working at the airport	88%	85%
Cleanliness of airport restrooms	87%	85%
Signage of airport terminals and roadways	85%	81%
Cleanliness of airport parking structures	87%	81%
Being treated in a courteous and professional manner by airport police	82%	79%
Information booth service	79%	79%
Services provided by Uber, Lyft, or Wingz	81%	77%
The security screening process	77%	75%
The amount of time it takes to get through security checkpoints	79%	75%
Being treated in a courteous and professional manner by TSA security screening staff	79%	74%
Rental car service	71%	74%
Door to door shuttle service from the airport (e.g. Super-Shuttle or Prime-Time, Not hotel shuttle)	73%	71%
Taxi service from the airport	73%	70%
The variety of air carriers	71%	69%
The quality of food and beverage services at John Wayne Airport	68%	68%
The quality of news, gift, and other retail services of JWA	68%	67%
Valet parking service	73%	67%
Airport art exhibits	68%	66%
Parking	73%	65%

This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

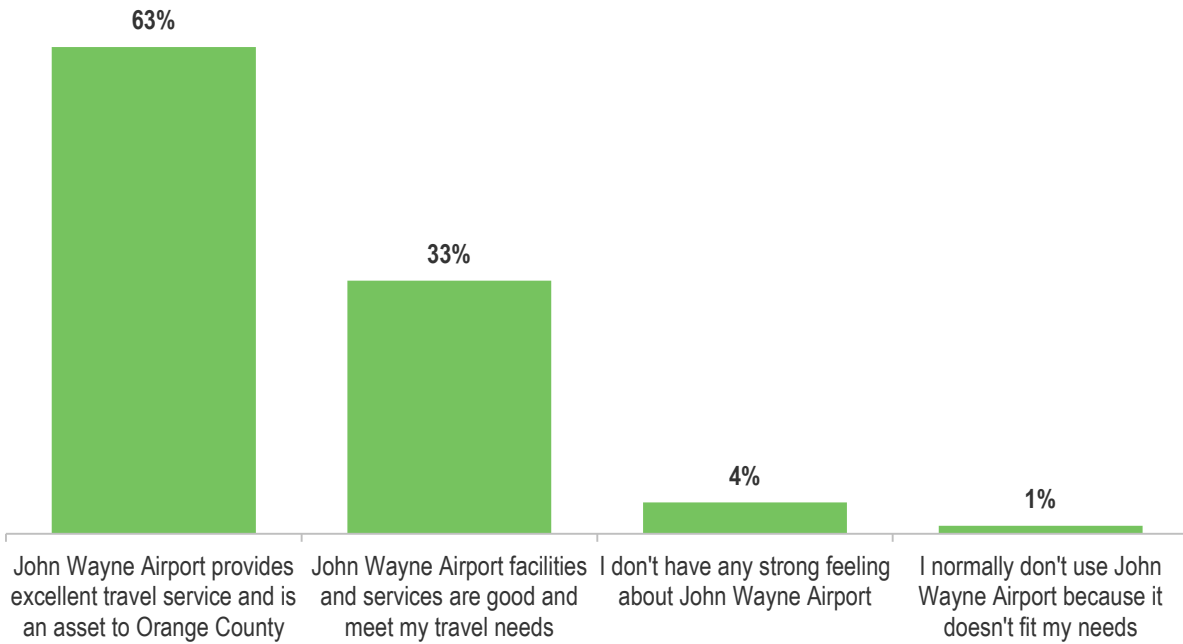
The majority of residents have positive attitudes about John Wayne Airport. Six in ten residents feel that JWA provides *excellent travel service and is an asset to Orange County*, and another third feel that *JWA facilities and services are good and meet my travel needs*. There is no significant change between the responses of residents in 2017 compared to this year.

Base size: 2019=400, 2017=404
Q23. In terms of your views about John Wayne Airport, which one of the following statements would you most agree with?



Attitudes about John Wayne Airport

Among All Residents



This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

Among residents, John Wayne Airport has a Net Promoter Score of 55, which is considered very good.

There are significantly less promoters of the airport among residents this year compared to 2017 (64% vs 71%).

- According to the Net Promoter framework, customers can be categorized into one of three groups: Promoters, Passives, and Detractors.
- Promoters are viewed as valuable assets that drive profitable growth because of their repeat/increased usage, longevity and referrals.
- Detractors are seen as liabilities that destroy profitable growth because of their complaints, reduced usage/defection and negative word-of-mouth.
- Net Promoter Score is obtained by asking one single question (i.e., likelihood to recommend) and subtracting the percent of Detractors from the percent of Promoters.
- Proponents of the Net Promoter approach claim that an organization's relative Net Promoter Score (its score relative to competitors) correlates with revenue growth relative to competitors.

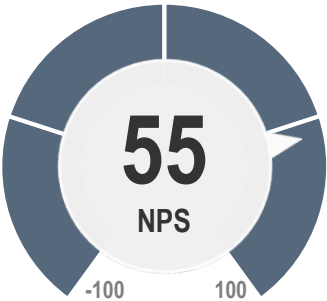
Base size: 2019=400, 2017=404

Q28. Based on your overall experience at the airport, how likely would you be to recommend John Wayne Airport to others?



Net Promoter Score

Among All Residents



Promoters (9-10 Rating) – Detractors (0-6 Rating) = Net Promoter Score (NPS)

PROMOTERS	PASSIVES	DETRACTORS
64%	27%	9%

Net Promoter, NPS, and Net Promoter Score are trademarks of Satmetrix Systems, Inc., Bain & Company, and Fred Reichheld

This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

The most-used source of information about John Wayne Airport is still *airline/airport websites*, and has increased significantly since 2017 (53% vs 41%). There were also significant increases in the use of *Expedia* (40% vs 30%), *Travelocity* (22% vs 17%), *relative/friend* (21% vs 15%), and *corporate travel planner* (6% vs 2%).

Significantly less residents this year compared to 2017 said they had not looked for information on JWA (8% vs 22%).

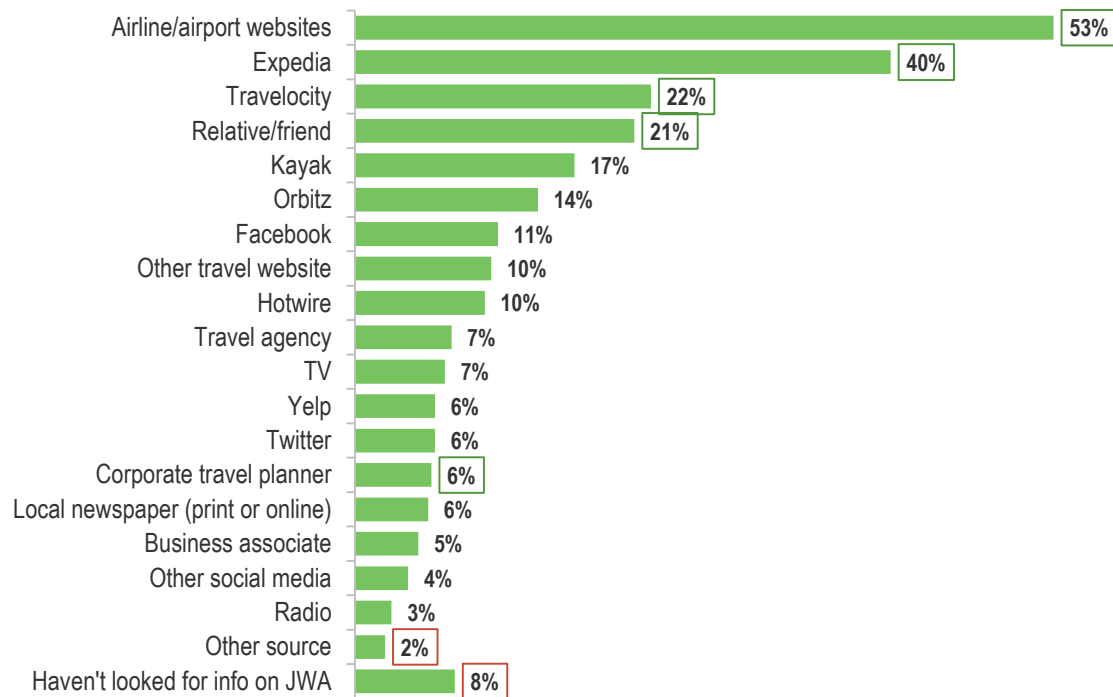
Significantly more female residents than male residents said they rely on *airline/airport websites* (60% vs 43%) for information.

Base size: 2019=400, 2017=404

Q12. What sources of information do you use for information about John Wayne Airport?
Select all that apply.



Sources of Information about John Wayne Airport Among All Residents



This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

The base size for this question is extremely low, and caution should be used when drawing conclusions from these results.

The most commonly read local newspaper among residents who use newspapers for information on JWA is the *Orange County Register* and *Los Angeles Times*.

* very low base sizes

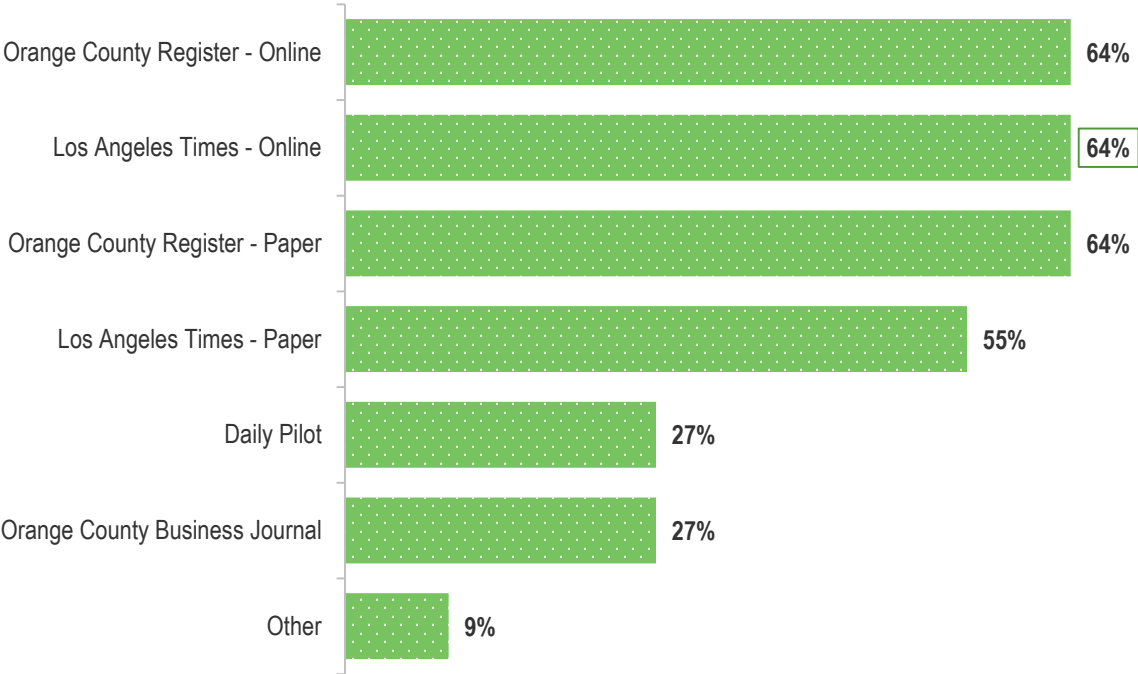
Base size: 2019=22, 2017=24

Q13. Please tell me which local newspapers you read. Select all that apply.



Newspaper for Information about JWA

Among Residents Who Use Local Newspaper for Information on JWA



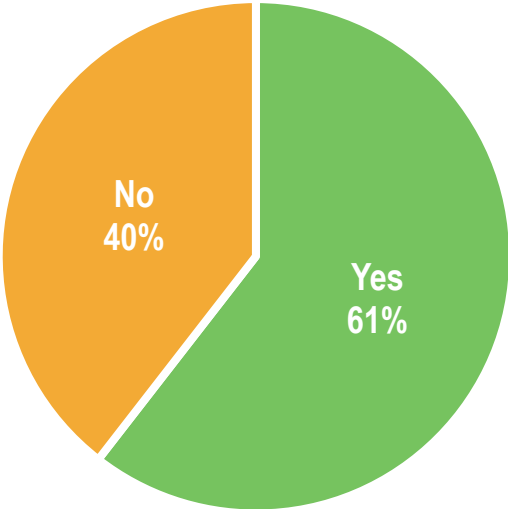
This year's data is compared to data collected in 2017 at the 95% confidence level. Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

Over half (61%) of Orange County residents have visited the John Wayne Airport website. There is no significant change in website visits among residents compared to 2017.



JWA Website Visits

Among All Residents



Base size: 2019=400, 2017=404
Q14. Have you ever visited the website for John Wayne Airport?

This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

Nine in ten (90%) residents who visited the JWA website report being able to find the information they needed. Three percent did not, and 11% could not recall. There are no significant changes in these results compared to 2017.

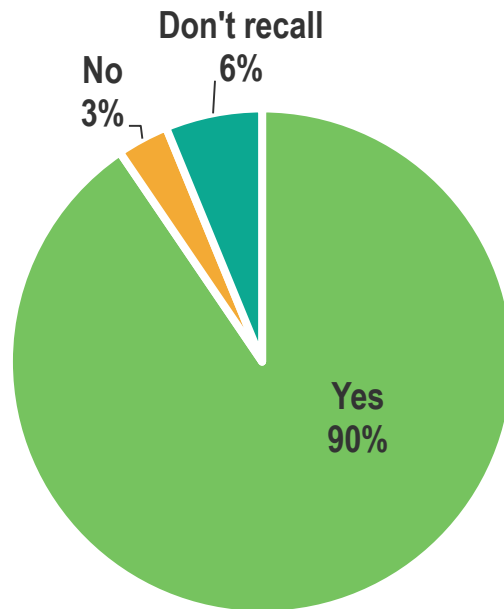
Base size: 2019=242, 2017=231

Q15. Did you find the information you needed on the website?



Found Needed Information on Website

Among Residents Who Have Visited JWA Website



This year's data is compared to data collected in 2017 at the 95% confidence level. Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

Residents who visited the JWA website were asked what additional information they would like to see on the site.

Responses included business hours, flight tracking, flight fares, traffic and parking information, security wait times, and construction updates.

Base size: n=44

Q16. What additional information would you like to see on the website?



Additional Information Wanted on Website Among Residents Who Have Visited JWA Website

- Flight delays (x8)
- Flight details / information (x5)
- Arrivals and departures updates (x3)
- Text message flight delays (x2)
- Flight tracking (x2)
- Clearer info on exactly the flight info needed
- flights beyond just a few weeks
- more updates information on plane size and gate changes
- In case a flight arrives at a different terminal, to get an updated list on when flights arrive what terminal they are in for people who pick up passengers
- Specific flight times per day and specific locations of different flights.
- Cheaper parking options (x2)
- More perks / offers / discounts / coupons (x11)
- Real time traffic / road status to the airport (x7)
- Real time TSA / security wait times (x6)
- Uber and Lyft times
- How crowded the airport is and how crowded the parking lot is
- Search bar / ability to search (x2)
- Easier navigation / ease of use (x2)
- A chat session (x2)
- More interactive
- cleaner design would be nice
- I would like them to revamp/redesign the website... looks a little old fashioned and unattractive.
- Easier to find the arrivals / arriving flights (x4)
- I would like it to be more iPhone friendly
- Food options and times of operations (x2)
- Restaurant menus (x2)
- Nearby restaurants (x2)
- More information on food and shopping and location on map
- Online ordering of food like they have in other major airports
- Closest parking to the terminal I was scheduled to depart from.
- Information regarding bus transportation
- Maybe more on car rentals
- More details in all pertinent areas, especially terminal layouts and parking and nearby car rentals.
- More on parking in the vicinity
- Parking information
- Parking Information and Uber Information
- parking maps
- Better / more detailed airport map (x3)
- location of terminal numbers
- Videos of getting around the airport
- Airlines serviced and destinations (x4)
- Links to airlines/travel sites. Price compare feature
- More destination information
- new flights
- Updates / more details on construction and expansion (x2)
- An app
- Available resorts in destinations
- different time zones time
- Luggage policy
- more information on how to be ecofriendly
- More support information
- more travel tips or suggestions
- Pictures
- Prices more clear
- student art shows.
- Tips on how to making flying faster
- Tours
- Update points on flights when you forget to do it when you purchase the ticket
- Weather updates

Open End responses from this year are not compared to responses from 2017.

Residents were asked to give their primary reason for choosing John Wayne Airport. The top reason is *location/proximity to their home or destination*. There was a significant increase in residents choosing JWA because it is *less busy/intimidating than other airports* (10% vs 6%).

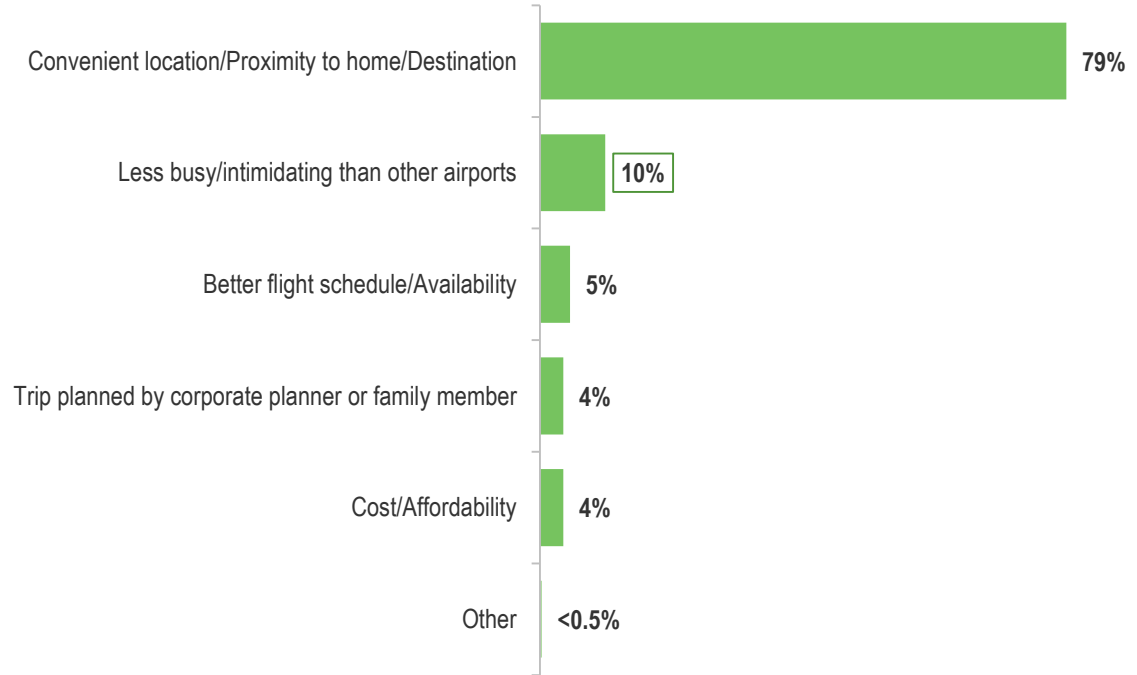
Significantly more female residents than male residents said they choose JWA because of *convenient location* (83% vs 73%), and significantly more male residents than female residents say they choose JWA because of *better flight schedules/availability* (7% vs 2%).

Base size: 2019=400, 2017=404

Q17. What is your primary reason for choosing John Wayne Airport?



Reason for Choosing John Wayne Airport Among All Residents



This year's data is compared to data collected in 2017 at the 95% confidence level. Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

The top reason residents give for choosing airports other than JWA is because of *cost/affordability*, followed by *flight schedule/availability*.

There was a significant increase in residents choosing other airports because of *more relaxing environments/less busy* (8% vs 2%) and because *travel was planned by corporate or family* (5% vs 2%).

Significantly more male residents than female residents choose other airports because *travel is planned by corporate or family* (7% vs 3%) and because of *choice of airlines* (7% vs 2%).

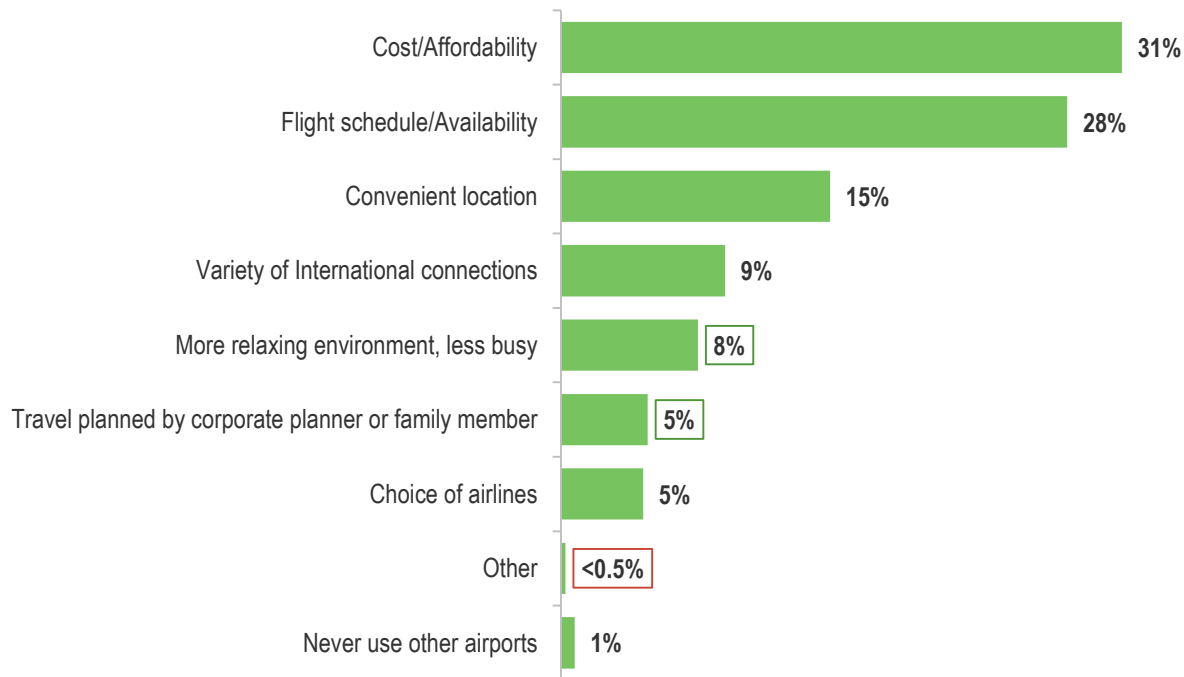
Base size: 2019=400, 2017=404

Q18. When you choose to fly out of airports other than John Wayne, what is your primary reason for doing so?



Reasons for Choosing Other Airports

Among All Residents



This year's data is compared to data collected in 2017 at the 95% confidence level. Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

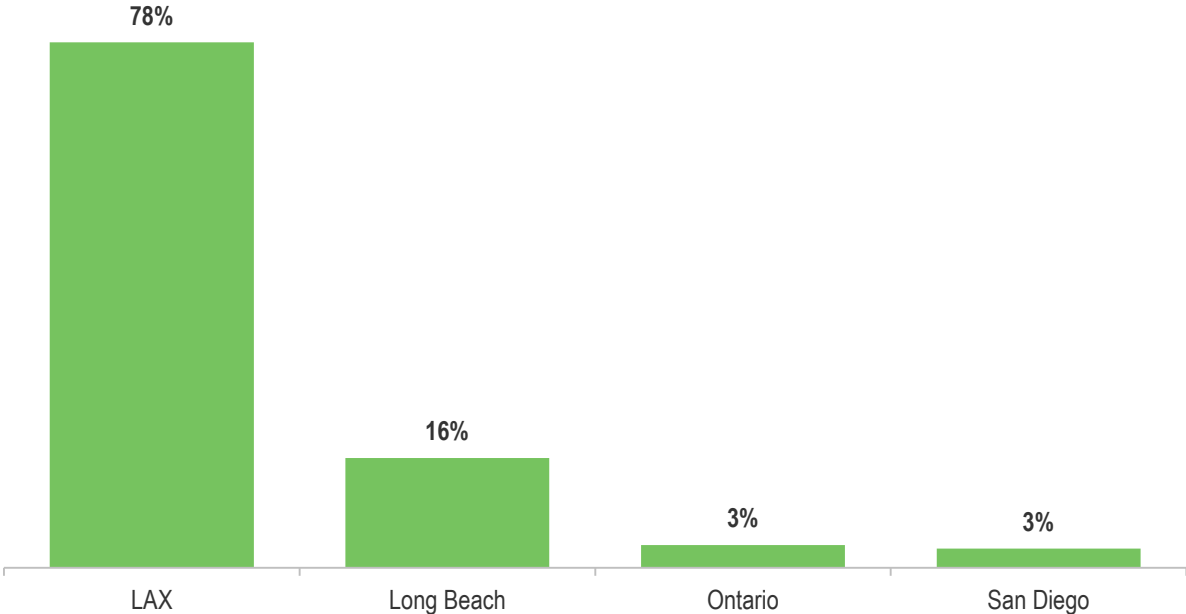
Among those who use airports other than JWA, LAX is by far the most-used among OC residents.

There is no significant change in alternative airports used by residents this year compared to 2017.



Other Airport Used Most Often

Among Residents that Use Other Airports



Base size: 2019=389, 2017=382

Q19. What other airport do you use most often?

This year's data is compared to data collected in 2017 at the 95% confidence level.
Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

About eight in ten Orange County residents surveyed report having made a food or beverage purchase at the airport. This is a significant decrease compared to 2017 (78% vs 82%).

Nearly half of residents report having made a purchase of magazines, gifts, or other items at the airport. There is no significant change compared to 2017.

Base size: 2019=400, 2017=404

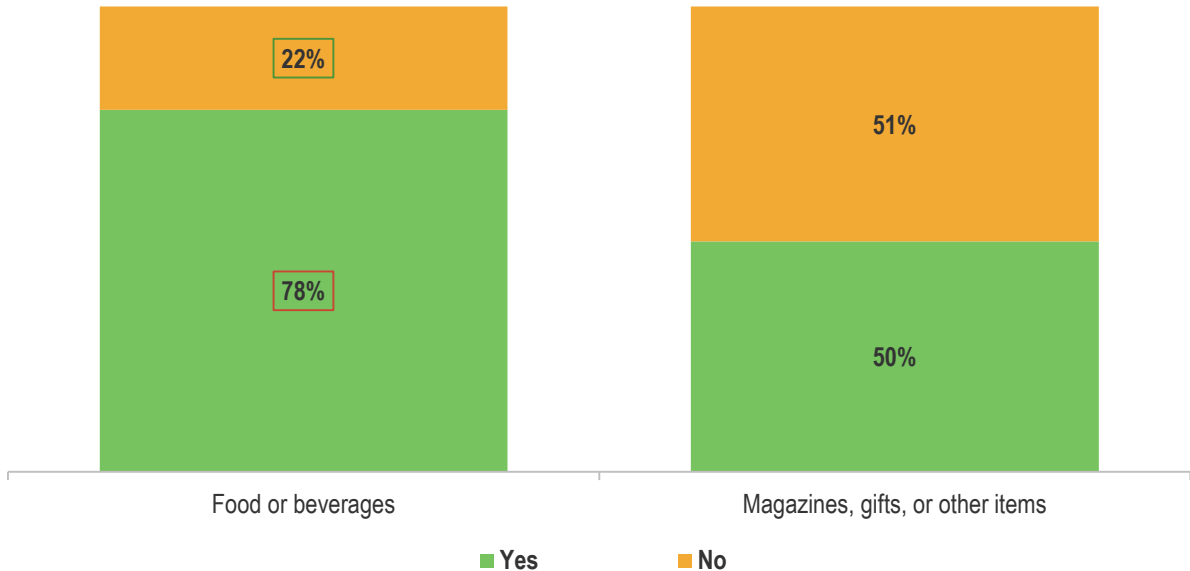
Q25. Have you purchased any food or beverages at John Wayne Airport in the last year?

Q26. Have you purchased magazines, gifts, or other items at any of the stores at John Wayne Airport in the last year?



Purchases

Among All Residents



This year's data is compared to data collected in 2017 at the 95% confidence level. Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

A total of fifty-eight percent of Orange County residents were aware that John Wayne Airport provides non-stop international service to either Canada, Mexico, or both.

There was a significant increase in residents that were aware of *Mexico*, but not *Canada* (16% vs 10%).

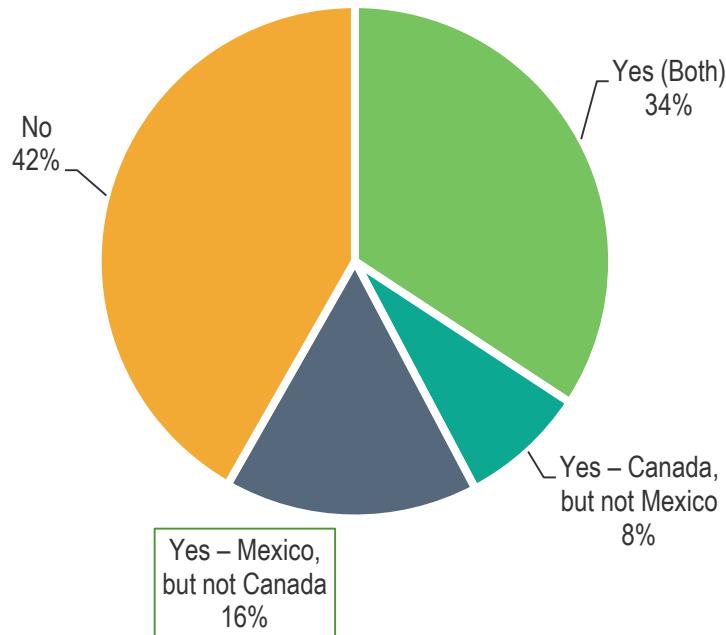
Significantly more male residents than female residents were aware of *both destinations* (41% vs 29%).

Base size: 2019=400, 2017=404

Q20. Prior to this survey, were you aware that JWA provides non-stop service to Mexico and Canada?



Awareness of Mexico & Canada Service Among All Residents



This year's data is compared to data collected in 2017 at the 95% confidence level. Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

The destination most passengers have flown to in the past is *Hawaii*, with nearly half of residents surveyed having flown there in the past. Three in ten residents indicated they had never flown to any of the listed destinations in the past.

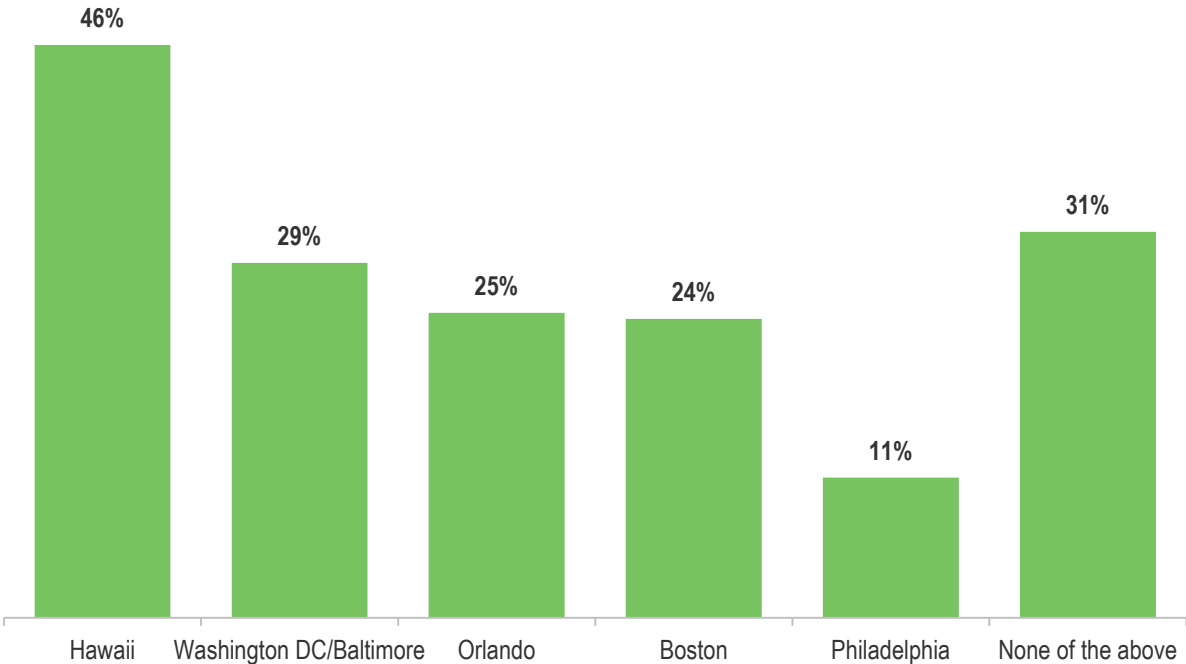
Base size: n=400

D1. Of the following domestic destinations, please indicate which ones you have flown to in the past.



Domestic Destinations Flown to In The Past

Among All Residents



This question was first asked this year. No comparison can be made to previous years.

By far, residents are most interested in flying to *Hawaii* out of JWA. Only 4% of residents were not interested in any destination listed.

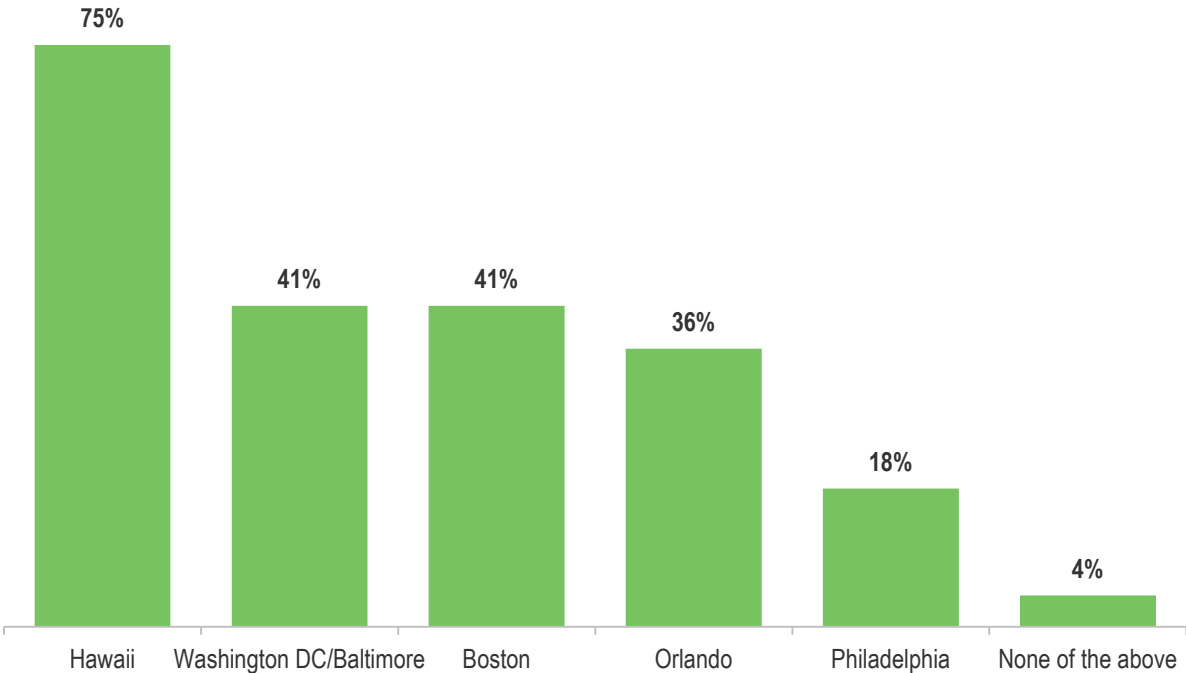
Significantly more female residents than male residents are interested in flying to *Hawaii* (79% vs 70%) and *Orlando* (42% vs 28%).

Base size: n=400
D2. Please select which destinations you would be interested in flying to out of John Wayne Airport.



Domestic Destinations Interested in Flying To From JWA

Among All Residents



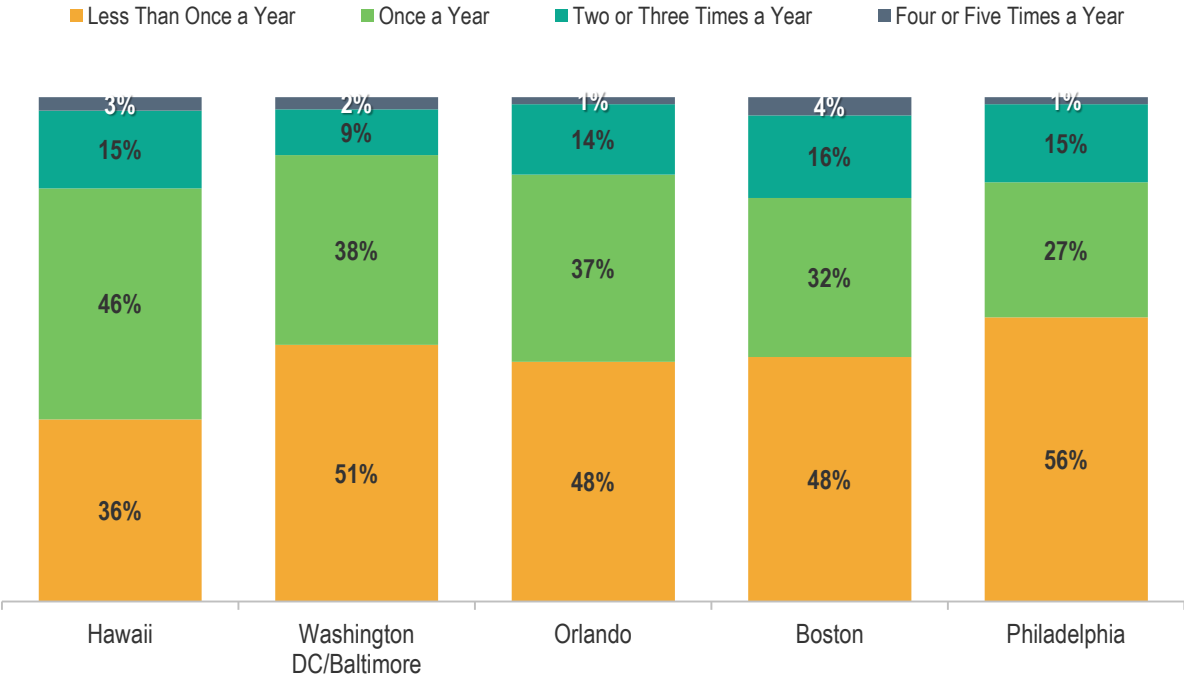
This question was first asked this year. No comparison can be made to previous years.

Among passengers interested in flying to the listed domestic destinations, most indicated they would fly to these destinations once a year or less than once a year. *Boston* has the highest potential for multiple flights in a year.



Potential Frequency of Flying to Domestic Destinations of Interest

Among Residents Interested in Flying to Each Destination from JWA



Base sizes vary by destination
D3. How often do you think you would fly out of John Wayne Airport to each of these domestic destinations, if it were a direct non-stop flight?

This question was first asked this year. No comparison can be made to previous years.

The international destination most residents have flown to in the past is *Cancun*, followed by *Toronto*. About half of residents indicated they had never flown to any of the listed destinations in the past.

More male residents than female residents said they had flown to *Toronto* (26% vs 18%) and *Mexico City* (22% vs 14%). More female residents than male residents have never flown to any of these destinations (56% vs 44%).

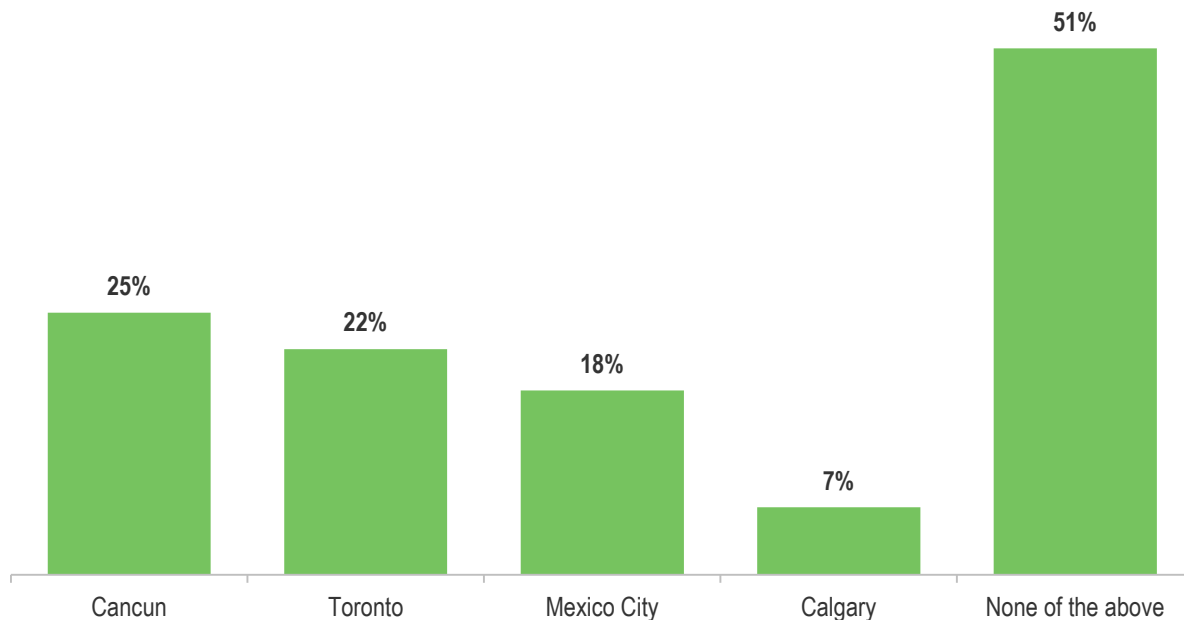
Base size: n=400

D4. Of the following international destinations, please indicate which ones you have flown to in the past.



International Destinations Flown to In The Past

Among All Residents



This question was first asked this year. No comparison can be made to previous years.

Residents are most interested in flying to *Toronto* and *Cancun* out of JWA. Fifteen percent are not interested in any of these international destinations.

Female residents are significantly more interested than male residents in flying to *Calgary* (28% vs 19%).

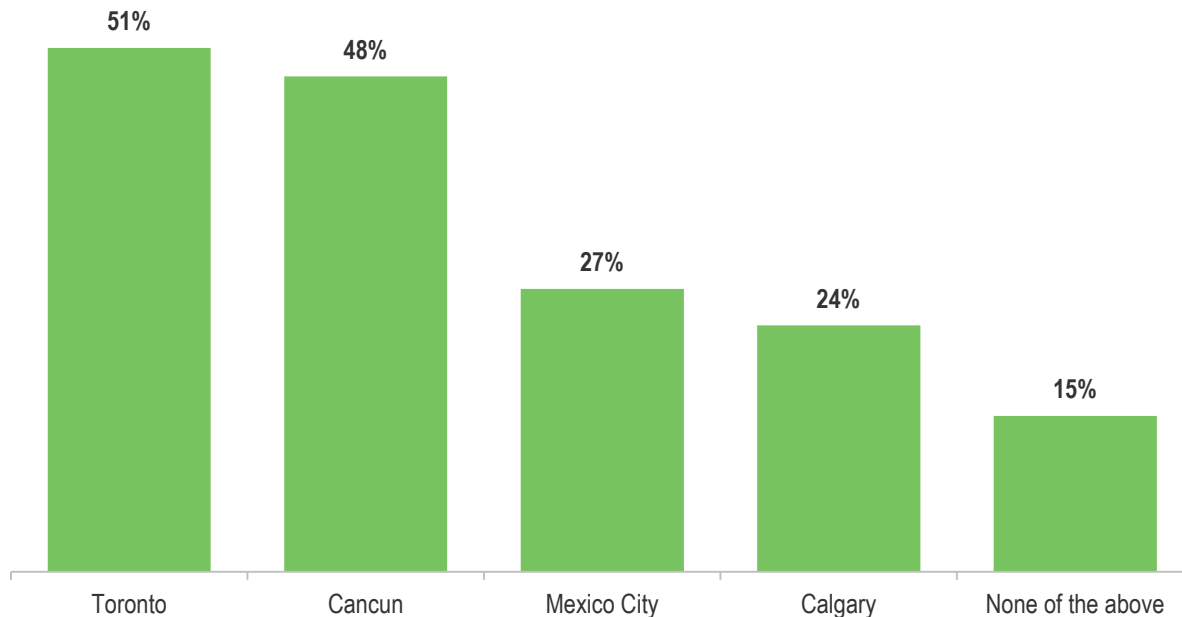
Base size: n=400

D5. Please select which destinations you would be interested in flying to out of John Wayne Airport.



International Destinations Interested in Flying To From JWA

Among All Residents



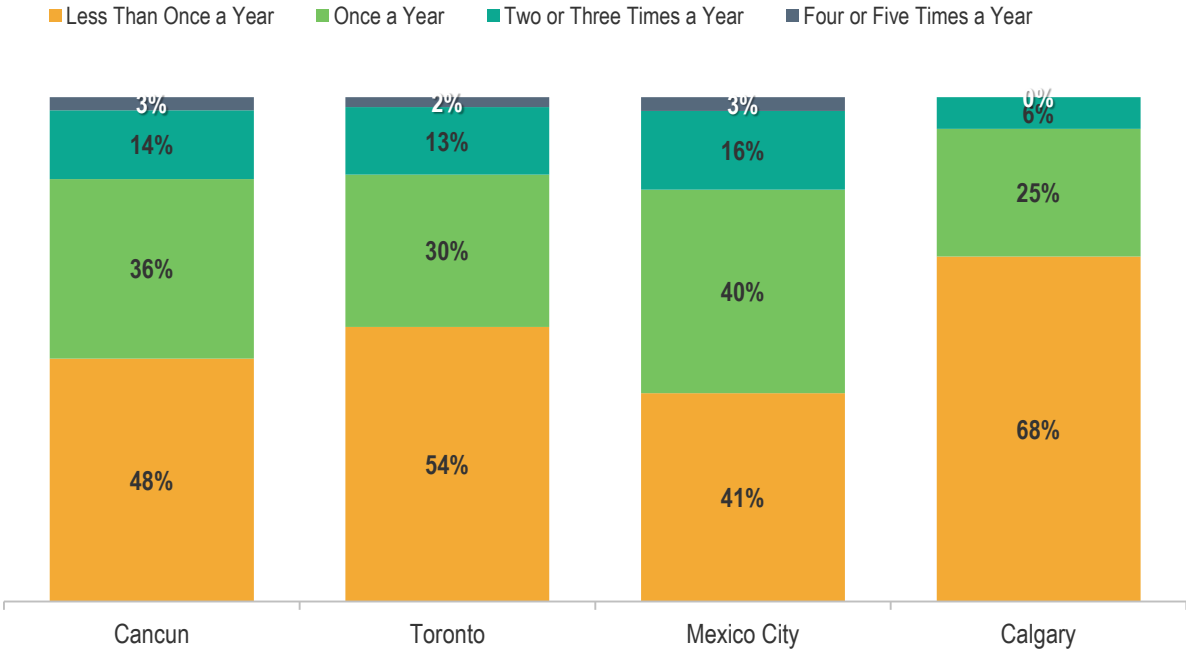
This question was first asked this year. No comparison can be made to previous years.

Among residents interested in flying to the listed international destinations, most indicated they would fly to these destinations once a year or less than once a year. *Mexico City* has the highest potential for multiple flights in a year.



Potential Frequency to International Destinations of Interest

Among Residents Interested in Flying to Each Destination from JWA



Base sizes vary by destination
D6. How often do you think you would fly out of John Wayne Airport to each of these international destinations, if it were a direct non-stop flight?

This question was first asked this year. No comparison can be made to previous years.



Demographic Profiles



Demographics – Passenger Survey

	2017	2019
Sample Size	410	599

Q50: Gender

Male	51%	41%
Female	49%	59%

Q46: Age

Average (Mean)	41.6	46.5
18 – 24	10%	8%
25 – 34	28%	21%
35 – 44	23%	17%
45 – 54	17%	18%
55 – 64	13%	20%
65 and older	10%	15%

Q49: Household Income

Average (Mean)	\$99.3k	\$117.5k
Under \$50,000	20%	15%
\$50 - \$99,999	38%	31%
\$100 - \$149,999	22%	24%
\$150 - \$199,999	13%	15%
\$200,000 +	6%	16%

Q6: Resident of Orange County

Resident	41%	26%
Visitor	59%	74%

	2017	2019
Sample Size	410	599

Q14: Primary Purpose of Trip

Business	22%	26%
Pleasure/Leisure	52%	53%
School/Education	1%	1%
Military	0%	0%
Personal	21%	17%
Other	3%	3%

Q27: Flown out of JWA Past 12 Months (incl. today)

Average (Mean)	2.9	3.0
1	44%	51%
2	24%	18%
3	10%	10%
4	6%	4%
5	4%	2%
6	3%	4%
7	2%	2%
8	2%	1%
9	0%	1%
10 - 15	2%	4%
16 - 20	0%	1%
Over 20	1%	1%

	2017	2019
Sample Size	410	599

Q47: Primarily English Household?

Yes	91%	93%
No	9%	7%

Q48: Primary Language Spoken in Home

Sample Size	37	43
Spanish	43%	37%
Chinese (Cantonese)	8%	18%
Vietnamese	8%	12%
Chinese (Mandarin)	16%	9%
Korean	5%	0%
Other (specify)	19%	25%

Arabic
Armenian (x2)
Dari
Filipino/ cebuano
Marathi
Portuguese
Russian
Sirean
Tagalog

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Significant differences are indicated by **green** (significantly higher) or **red** (significantly lower) highlighting

Demographics – Passenger Survey

	2017	2019
Q8: Home City (among OC residents)		
<i>Sample Size</i>	167	156
Aliso Viejo	2%	0%
Anaheim	9%	7%
Brea	2%	0%
Buena Park	4%	1%
Capistrano Beach	0%	0%
Corona Del Mar	0%	1%
Costa Mesa	7%	9%
Coto de Caza	0%	0%
Cypress	3%	2%
Dana Point	1%	3%
Foothill Ranch	1%	1%
Fountain Valley	4%	2%
Fullerton	6%	4%
Garden Grove	8%	2%
Huntington Beach	4%	4%
Irvine	7%	13%
La Habra	2%	1%
La Palma	2%	0%
Ladera Ranch	0%	3%
Laguna Beach	1%	1%
Laguna Hills	2%	1%
Laguna Niguel	4%	3%

	2017	2019
Q8: Home City (among OC residents) <i>continued</i>		
<i>Sample Size</i>	167	156
Laguna Woods	0%	3%
Lake Forest	3%	3%
Los Alamitos	1%	2%
Midway City	0%	1%
Mission Viejo	2%	4%
Newport Beach	1%	5%
Orange	4%	6%
Placentia	0%	0%
Portola Hills	0%	0%
Rancho Santa Margarita	1%	2%
San Clemente	2%	1%
San Juan Capistrano	0%	4%
Santa Ana	5%	2%
Seal Beach	2%	0%
Stanton	0%	0%
Trabuco Canyon	0%	0%
Tustin	4%	3%
Villa Park	0%	1%
Westminster	3%	1%
Yorba Linda	1%	1%
Other	2%	5%

Demographics – Resident Survey

	2017	2019
Sample Size	404	400

Q33: Gender

Male	51%	46%
Female	49%	54%

Q29: Age

Average (Mean)	43.8	41.4
18 – 24	10%	17%
25 – 34	22%	25%
35 – 44	18%	17%
45 – 54	22%	18%
55 – 64	12%	14%
65 and older	11%	10%
Refused	5%	0%

Q32: Household Income

Average (Mean)	\$114.8k	\$105.6k
Under \$50,000	15%	19%
\$50 - \$99,999	31%	35%
\$100 - \$149,999	15%	25%
\$150 - \$199,999	13%	12%
\$200,000 +	15%	11%
Refused	11%	0%

	2017	2019
Sample Size	404	400

Q6: Flown out of JWA Past 12 Months (incl. today)

Average (Mean)	2.7	2.4
1	45%	48%
2	25%	28%
3	12%	10%
4	7%	7%
5	3%	1%
6	2%	1%
7	1%	2%
8	1%	1%
9	1%	0%
10 - 15	2%	2%
16 – 20	0%	0%
Over 20	1%	1%

	2017	2019
Sample Size	404	400

Q30: Primarily English Household?

Yes	93%	97%
No	7%	4%

Q31: Primary Language Spoken in Home

Sample Size	29	14
Spanish	31%	50%
Vietnamese	24%	14%
Chinese (Mandarin)	14%	7%
Korean	3%	0%
Chinese (Cantonese)	0%	0%
Other (specify)	28%	29%

Dutch
Farsi
Tamil

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Thank you!

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