

# JOHN WAYNE AIRPORT ORANGE COUNTY

## John Wayne Airport Survey

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### 2022 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 third wave that Phoenix MarketCast has been contracted to conduct the surveys on the airport's behalf.

Two surveys were conducted concurrently between August 19 and August 29, 2022: one among airport passengers and one among Orange County residents. The onsite passenger survey was conducted among 505 departing passengers in the gate hold area while they waited to board their flights. The resident survey was conducted among 517 Orange County residents recruited from online panel sample, screened to be OC residents over the age of 18 who had flown out of John Wayne Airport in the past 12 months.

Overall, 94% of passengers surveyed were 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. Three quarters (73%) of passengers rated JWA as a 5 out of 5, which is a significant increase compared to 2019.

Overall, 89% of Orange County residents were satisfied with John Wayne Airport (giving a Top 2 Box score). About half (51%) of Orange County residents are very satisfied (rating a 5 out of 5). There was no significant difference in resident satisfaction this year compared to 2019.

\*The 2021 wave was delayed to 2022 due to the Covid-19 pandemic and travel disruptions

# 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

- Being treated in a courteous and professional manner by TSA security screening staff #1
- The amount of time it takes to get through security check points #2
- Valet parking service #3



Overall Airport Satisfaction

## Top 3 Drivers of Overall Satisfaction – Resident Survey

- #1 Making you feel safe and secure in the terminals
- #2 Overall customer service provided by everyone working at the airport
- #3 Cleanliness of airport terminals



# Methodology



## ONSITE PASSENGER SURVEY n = 505 departing passengers

Interviews were conducted daily from August 19 to August 25, 2022 in two 8-hour shifts per day (6am-2pm, 2pm-10pm) to ensure a representative sample of departing passengers

Passengers were selected by trained interviewers using random selection procedures in the gate areas; surveys were self-administered on electronic tablets with the interviewer available to assist

It took the average respondent approximately nineteen minutes to complete the intercept survey

160 respondents are Orange County residents, and 345 were visitors to the area

The total Passenger sample of n = 505 yields a statistical accuracy of +/- 4.4 percent at the 95% confidence level



## ONLINE RESIDENT SURVEY n = 517 Orange County residents

Surveying was conducted between August 19 and August 29, 2022

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

517 respondents completed the online survey

It took the average respondent approximately nine minutes to complete 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 = 517 yields a statistical accuracy of +/- 4.3 percent at the 95% confidence level

## ANALYSIS

The Resident and Passenger survey questionnaires were kept nearly identical to the previous year's (2019) survey. The onsite passenger survey had six questions added regarding the digital display screens.

This year's findings are compared to the previous 2019 findings where data is available and sample sizes are sufficient. Significant differences at the 95% confidence level are indicated by teal highlighting of significantly higher values and orange highlighting of significantly lower values.

**The 2019 wave was conducted between September 26 and October 3, 2019. Since air travel is seasonal, caution should be used when making comparisons.**

Among the onsite passenger data, significance testing was also conducted between residents vs. visitors and business vs. leisure travelers (leisure includes all non-business travelers). Significant differences are noted where relevant.

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



## Passenger Onsite Survey Results



Overall, 94% of passengers surveyed onsite were 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. Three quarters (73%) of passengers rated JWA as a 5 out of 5, while two in ten (22%) gave a rating of 4. Two percent of passengers are dissatisfied overall.

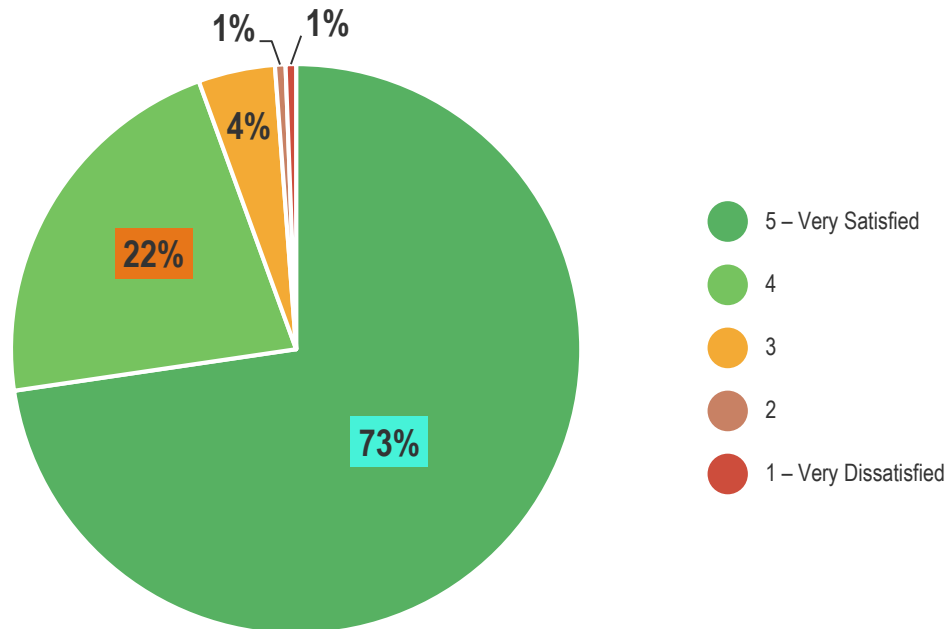
Significantly more passengers this year compared to 2019 were very satisfied with their experience.

Base size: 2022=505; 2019=599 (weighted)

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 2019 at the 95% confidence level. Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

Passengers who said they were satisfied (Top 2 Box) with their experience at John Wayne Airport 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, cited by three quarters (76%) of passengers. There was a significant decrease in passengers selecting *less busy*, *good customer service*, *quick*, and *safe/secure* compared to 2019.

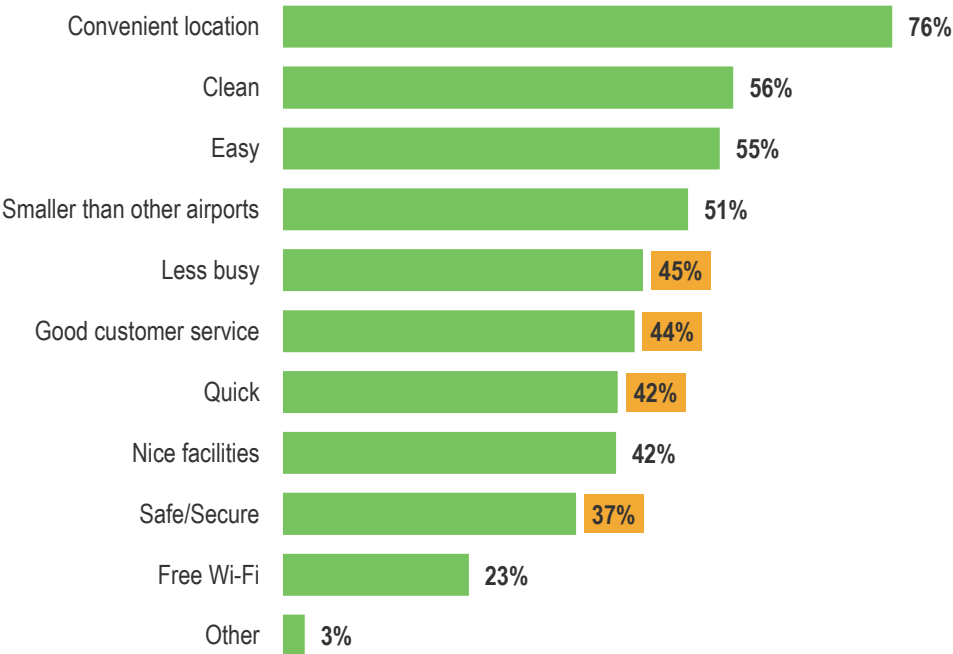
Passengers who are residents of Orange County were significantly more likely than visitors to select *smaller than other airports* and *safe/secure*.

Base size: 2022=477; 2019=554 (weighted)  
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 2019 at the 95% confidence level.  
Significant differences are indicated by teal (significantly higher) or orange (significantly lower) highlighting



Passengers were most satisfied with the *cleanliness of airport terminals* and the airport *making them feel safe and secure in the terminals*. Passengers were least satisfied with *taxi service from the airport* and *valet parking service*.

Passengers this year were significantly more satisfied compared to 2019 with the *cleanliness of airport restrooms*, *variety of air carriers*, *quality of news, gift, and other retail services*, *quality of food and beverage*, *airport art exhibits*, *parking*, and *valet parking service*. Passengers were less satisfied compared to 2019 with the *amount of time it takes to get through security check points* and *services provided by Uber, Lyft, or Wingz*.

Business travelers were significantly more satisfied than leisure travelers with the *cleanliness of airport terminals* and *signage of airport terminals*.

Passengers who are OC residents were significantly more satisfied than visitors with the *cleanliness of airport parking structures*, *parking*, and *signage of airport terminals*, while visitors were more satisfied with *rental car services*.

*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

**Top 2 Box (Rating 4/5)**  
Ranked Highest to Lowest for 2022

	2019	2022
Cleanliness of airport terminals	92%	93%
Making you feel safe and secure in the terminals	92%	92%
Overall customer service provided by everyone working at the airport	92%	90%
Being treated in a courteous and professional manner by TSA security screening staff	88%	88%
Cleanliness of airport restrooms	80%	87%
The security screening process	89%	86%
The amount of time it takes to get through security check points	91%	85%
Signage of airport terminals and roadways	82%	78%
The variety of air carriers	65%	76%
The quality of news, gift, and other retail services of JWA	54%	68%
The quality of food and beverage services at John Wayne Airport	53%	68%
Being treated in a courteous and professional manner by airport police	58%	61%
Cleanliness of airport parking structures	53%	55%
Airport art exhibits	43%	51%
Parking	25%	35%
Services provided by Uber, Lyft, or Wingz	97% **	33%
Information booth service	30%	31%
Rental car service	27%	29%
Courtesy Shuttles / Door-to-Door Shuttles (not hotel shuttles)	16%	20%
Taxi service from the airport	17%	19%
Valet parking service	11%	19%

\*\* Not a direct comparison; question was asked separately in 2019

This year's data is compared to data collected in 2019 at the 95% confidence level.

Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

Just under half (44%) of passengers feel JWA provides *excellent travel service and is an asset to Orange County*, which is a significant decrease from 52% in 2019.

Four in ten (41%) feel JWA facilities are *good and meet their needs*, and 13% *don't have any strong feelings about JWA*.

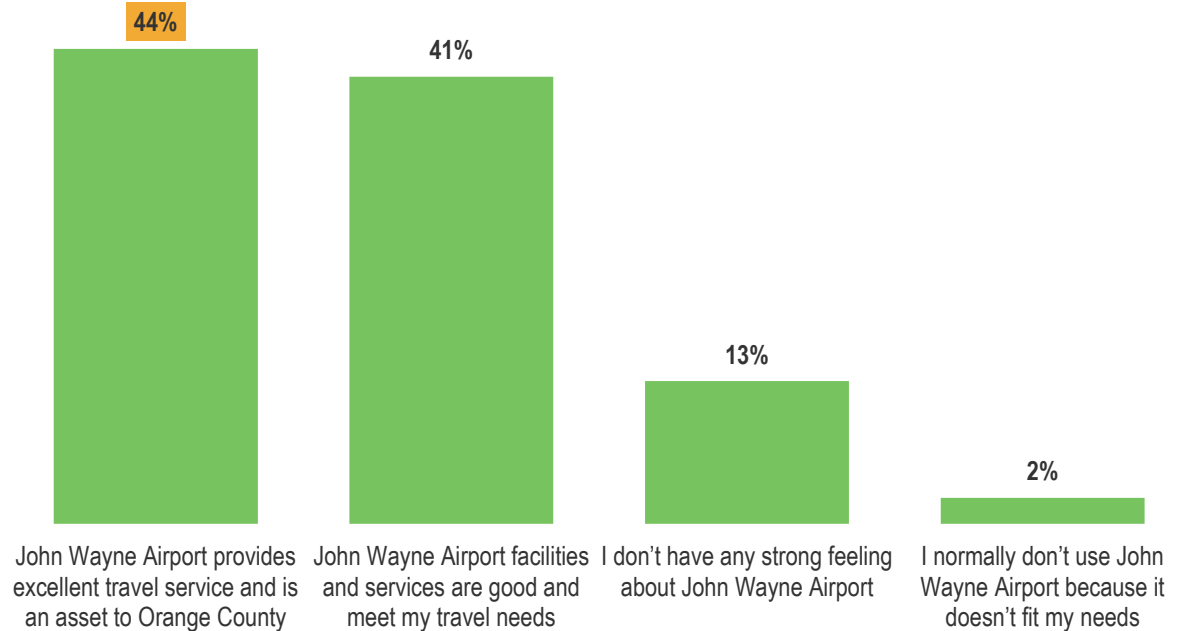
More leisure travelers than business travelers said they *do not have any strong feelings about JWA*.

Passengers who are OC residents were significantly more likely than visitors to say that *John Wayne Airport provides excellent travel service and is an asset to Orange County*.

Base size: 2022=505; 2019=599 (weighted)  
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 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

Among passengers, John Wayne Airport has a Net Promoter Score of 73, which is considered excellent. There are no significant changes in NPS compared to 2019.

- 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.

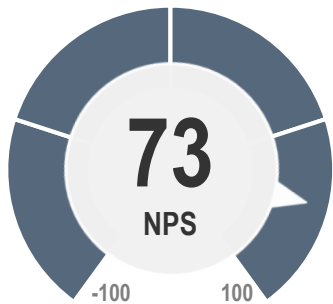
Base size: 2022=505; 2019=599 (weighted)

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
78%	17%	5%

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 2019 at the 95% confidence level.  
Significant differences are indicated by teal (significantly higher) or orange (significantly lower) highlighting

Significantly less passengers this year compared to 2019 looked for information on JWA (53% seeking information vs 24%).

The most-used source of information about John Wayne Airport is *airline/airport website*, with about one quarter (26%) of passengers citing it as a source. This is a significant decrease since 2019. Use of *Expedia*, *travel agency*, *local newspaper*, *radio*, and *TV* are also significantly lower compared to 2019.

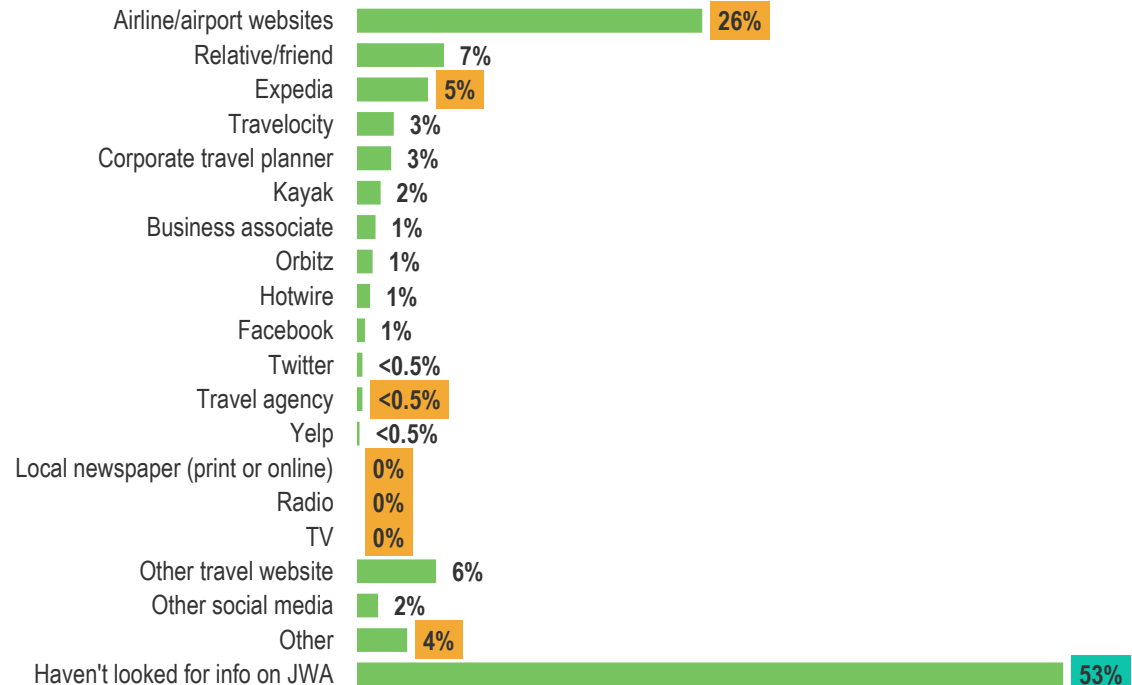
Passengers who are OC residents were more likely to use *Expedia* and *Travelocity*, while visitors were more likely to use a *relative/friend*.

Business travelers were more likely than leisure travelers to use a *business associate* or *corporate travel planner*, while leisure travelers were more likely to use a *relative/friend*.

Base size: 2022=505; 2019=599 (weighted)  
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



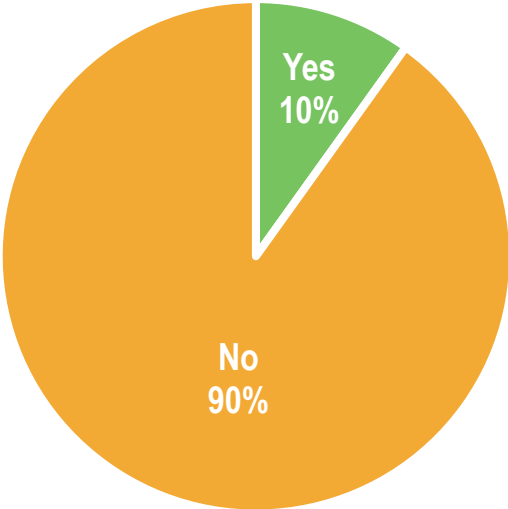
This year's data is compared to data collected in 2019 at the 95% confidence level.  
Significant differences are indicated by teal (significantly higher) or orange (significantly lower) highlighting

One in ten passengers (10%) surveyed said they visited the John Wayne Airport website for their current trip. There was no significant change compared to passengers in 2019.



## Website Visits Before Current Trip

Among All Passengers



Base size: 2022=505; 2019=599 (weighted)  
Q20. Did you visit the website for John Wayne Airport for this trip?

This year's data is compared to data collected in 2019 at the 95% confidence level. Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting



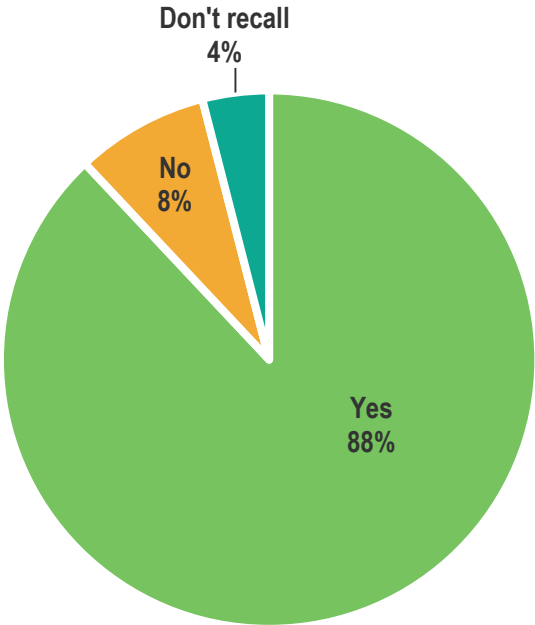
Nearly nine in ten (88%) passengers who visited the JWA website report being able to find the information they needed. Eight percent did not, and 4% could not recall. There are no significant changes in these results compared to 2019.

Base size: 2022=50; 2019=66 (weighted)  
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 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

The top reason passengers give for choosing JWA for their flight is *convenient location/proximity to their home or destination*, cited by 65% of passengers, which is a significant decrease from 72% in 2019.

Significantly more passengers this year compared to 2019 chose JWA because the airport is *less busy/intimidating than other airports* or because the trip was *planned by corporate planner or family member*.

More Orange County residents than visitors chose JWA because of *convenient location/proximity to their home or destination*, while more visitors chose JWA because the trip was *planned by corporate planner or family member*.

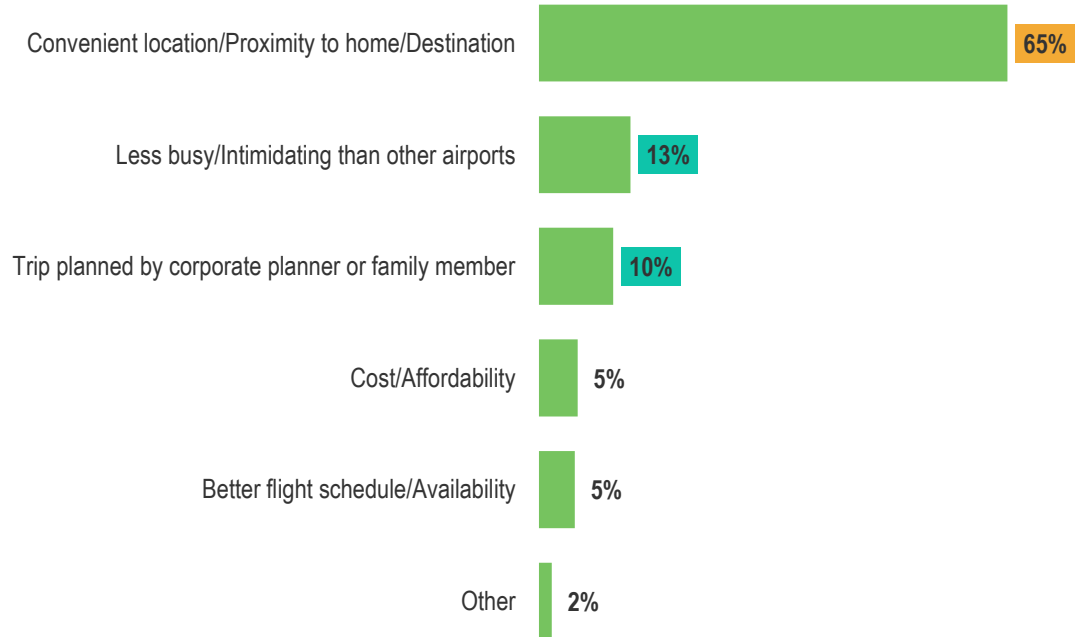
More business travelers than leisure travelers chose JWA because the trip was *planned by corporate planner or family member*.

Base size: 2022=505; 2019=599 (weighted)

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 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

The top reason passengers give for choosing airports other than JWA is because of *convenient location*, cited by one quarter (27%) of passengers. This was a decrease compared to 34% in 2019. Passengers this year were more likely to say they selected other airports because of *travel planned by corporate planner or family member* or *choice of airlines* compared to passengers in 2019.

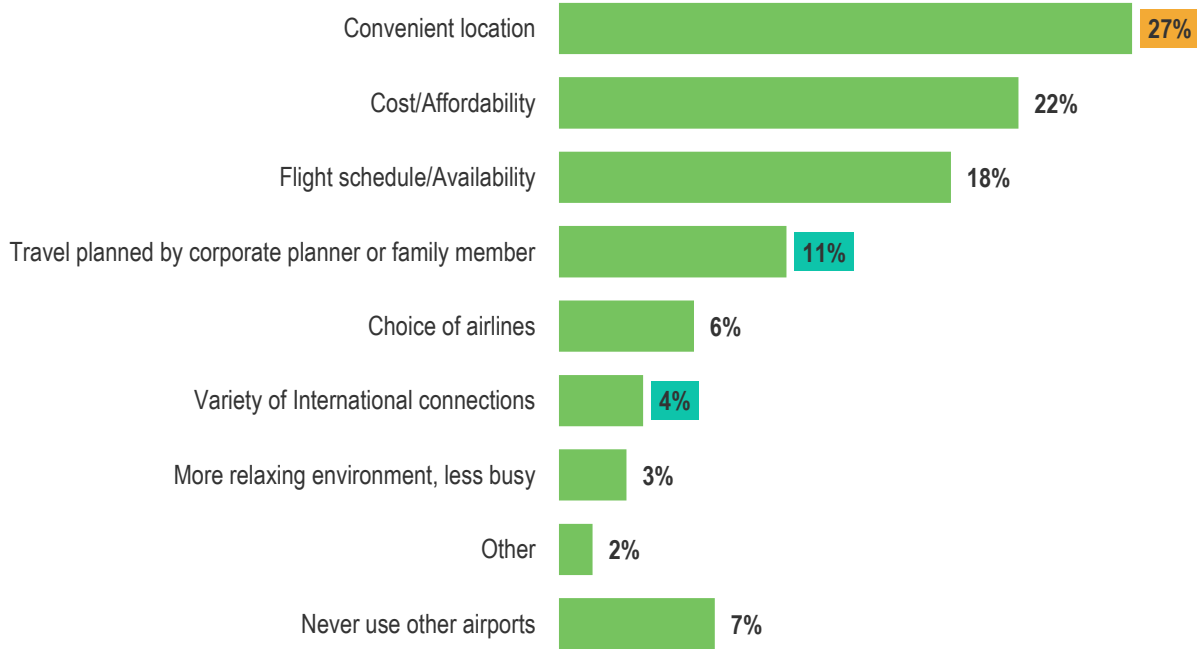
OC residents were more likely to select other airports because of *cost/affordability*, *more relaxing environment/less busy*, and *variety of international connections*, while visitors were more likely to select other airports because of *convenient location* or *travel planned by corporate planner or family member*.

Business travelers were more likely than leisure travelers to say they *never use other airports*.

Base size: 2022=505; 2019=599 (weighted)  
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 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

Among those who use airports other than JWA, *LAX* is by far the most-used at about two thirds (64%), which is not significantly different from 2019 (69%).

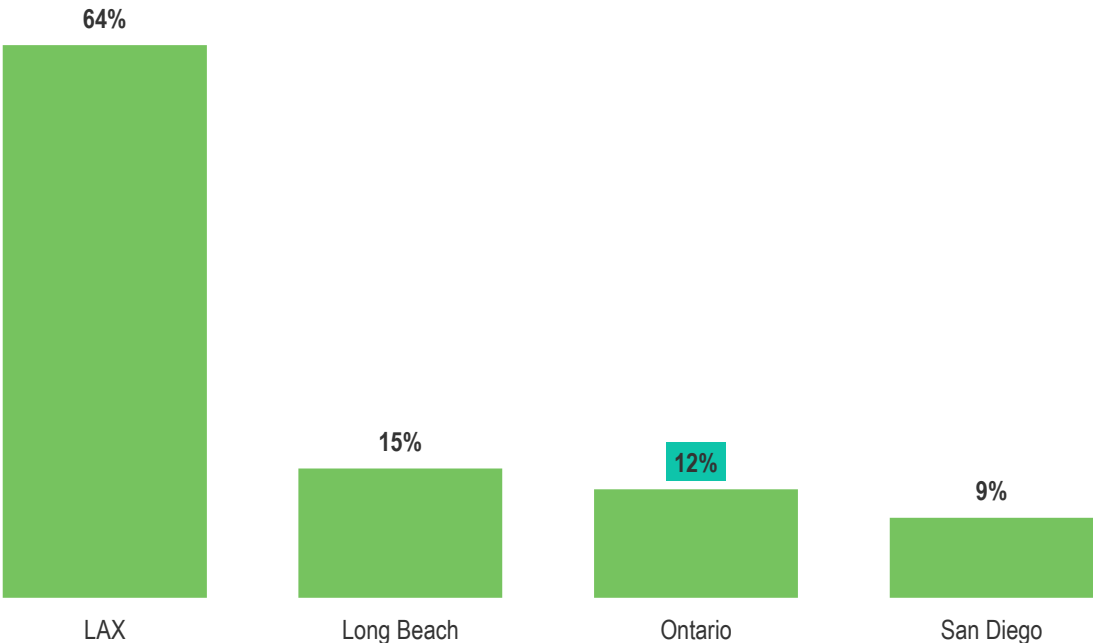
There was a significant increase this year in those using *Ontario* (12% vs 5%) compared to 2019.

Residents of Orange County were more likely than visitors to use *LAX*, while visitors were more likely to use *San Diego*.



## Other Airport Used Most Often

Among Passengers that Use Other Airports



Base size: 2022=337; 2019=441 (weighted)  
Q25. What other airport do you use most often?

This year's data is compared to data collected in 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

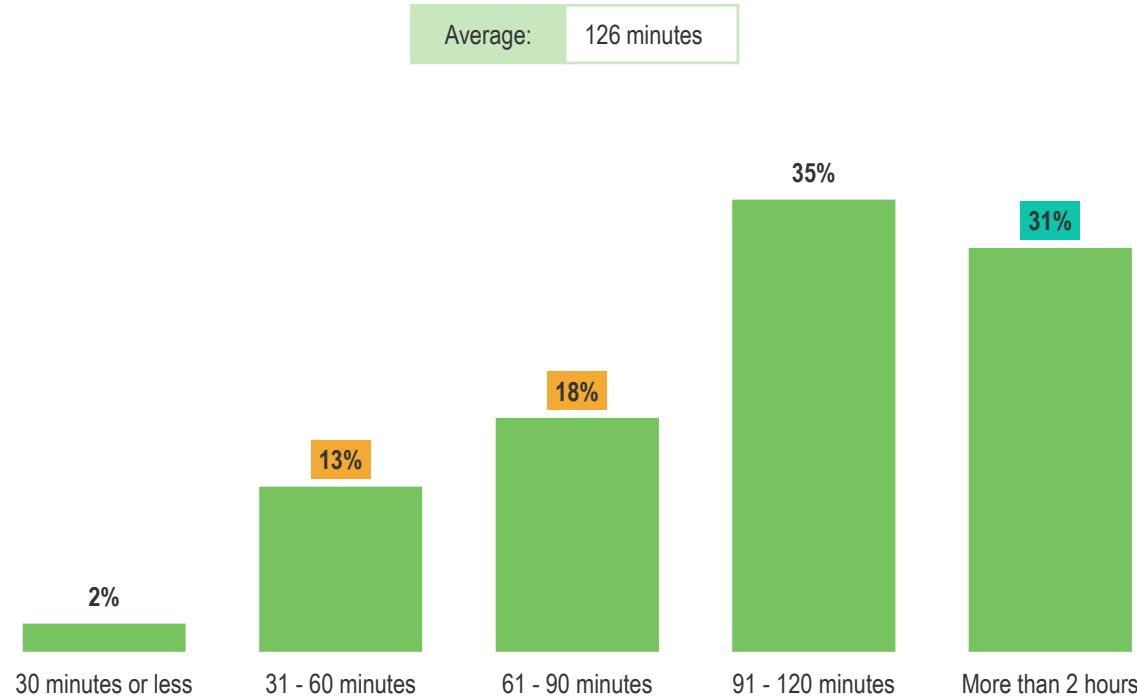
Passengers arrived an average of two hours and six minutes before the scheduled departure of their flight. There is no significant difference in the average arrival time compared to 2019, but this year there was an increase in passengers arriving *more than 2 hours* before their flight, and a decrease in those arriving between half an hour and one and a half hours before their flight. Visitors were more likely than OC residents to arrive earlier before their scheduled departure time.

Base size: 2022=505; 2019=599 (weighted)  
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 2019 at the 95% confidence level. Significant differences are indicated by teal (significantly higher) or orange (significantly lower) highlighting



Passengers were asked to select the method of transportation they used to arrive at JWA on the day of their flight. There was a significant increase this year compared to 2019 in passengers arriving by private auto, either *dropped off* or *drive*. There was a significant decrease in those using *Uber/Lyft/Wingz* or *door-to-door airport shuttle*.

OC residents were more likely to *drive*, while visitors were more likely to arrive by *hotel/motel/courtesy shuttle*, *rental car*, or *taxi*.

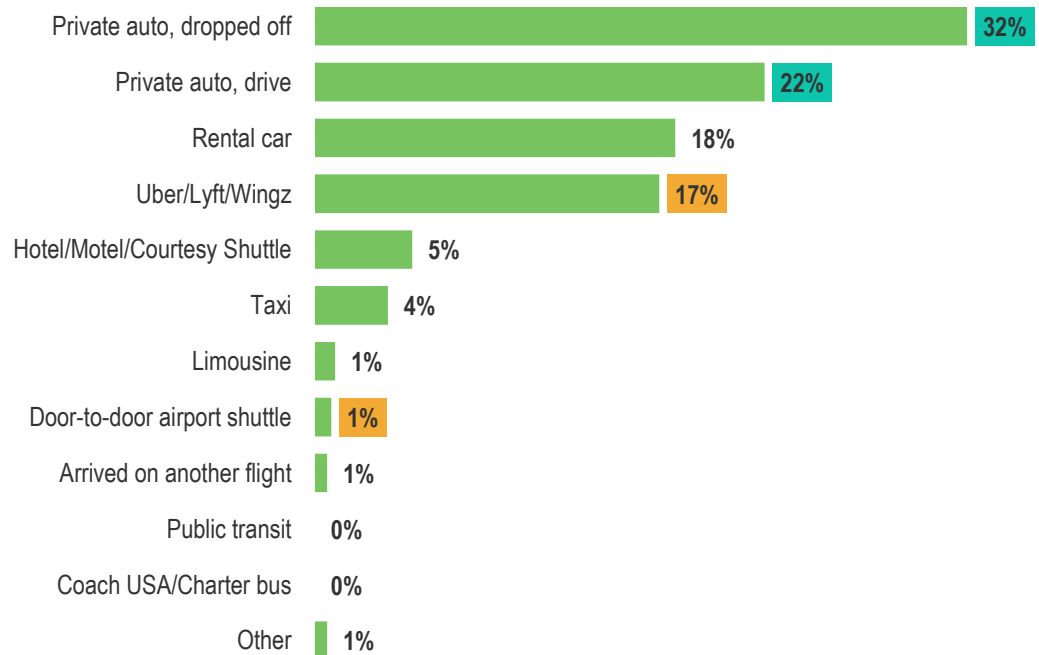
Leisure travelers were more likely than business travelers to arrive via *hotel/motel/courtesy shuttle* or *dropped off in a private automobile*, while business travelers were more likely to arrive via *rental car*.

Base size: 2022=505; 2019=599 (weighted)

Q9. How did you get to the airport today?



## Transportation to the Airport Among All Passengers



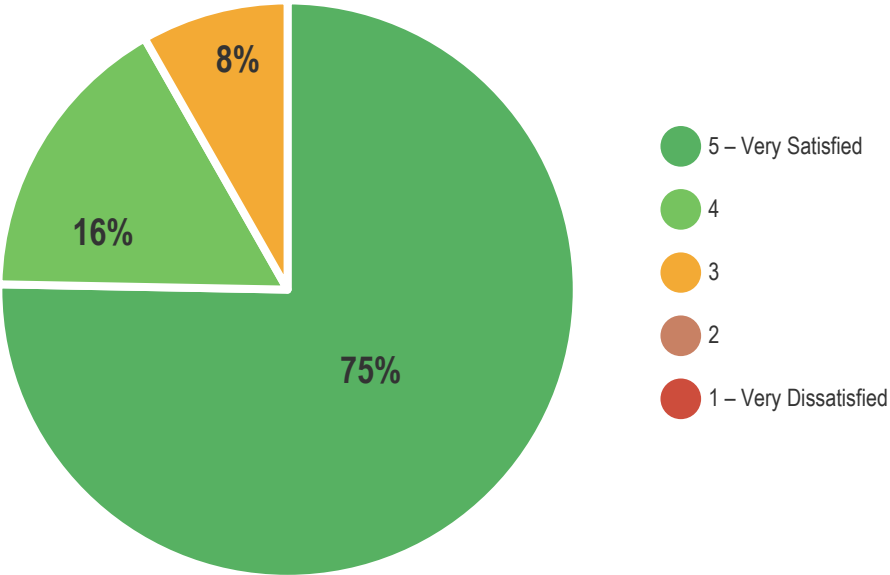
This year's data is compared to data collected in 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

Nearly all passengers (92%) who arrived at the airport via rideshare were satisfied (Top 2 Box) with the service getting them to the airport. There is no significant difference in satisfaction compared to 2019.



## Satisfaction with Rideshare Arrival Service

Among Passengers Arriving via Uber/Lyft/Wingz



Base size: 2022=85; 2019=190 (weighted)  
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 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

About two thirds (64%) of passengers who drove a private vehicle to the airport reported parking at the airport. This is a significant increase compared to 2019.

Significantly more business travelers than leisure travelers parked their vehicle at the airport.

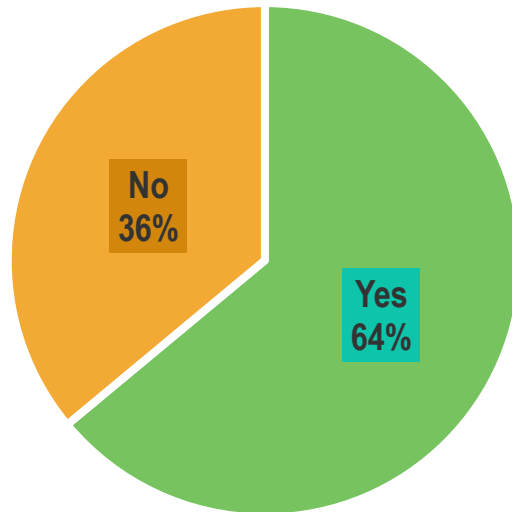
Base size: 2022=111; 2019=82 (weighted)

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 2019 at the 95% confidence level. Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

About seven in ten (69%) of passengers that parked their car at the airport parked in the *terminal parking structure*.

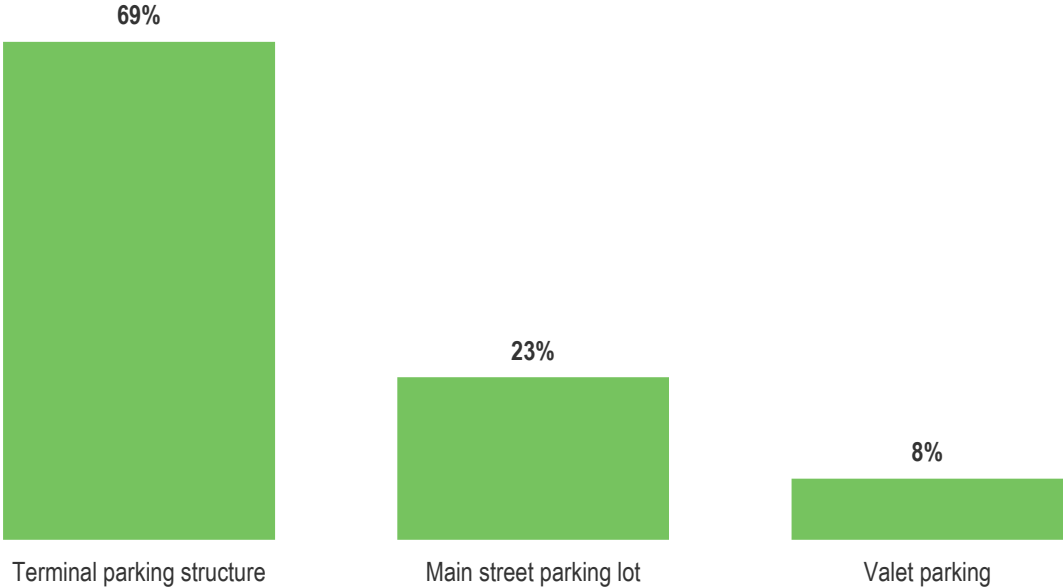
There is no significant difference in parking location this year compared to 2019.

Base size: 2022=71; 2019=36 (weighted)  
Q12. Which parking option did you choose?



## Parking Option Chosen

Among Passengers Arriving by Car & Parked at Airport



This year's data is compared to data collected in 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

The main reason given by passengers who parked their car at the airport for choosing their parking option was for *convenience*. This is a significant decrease compared to 2019 (45% vs 67%).

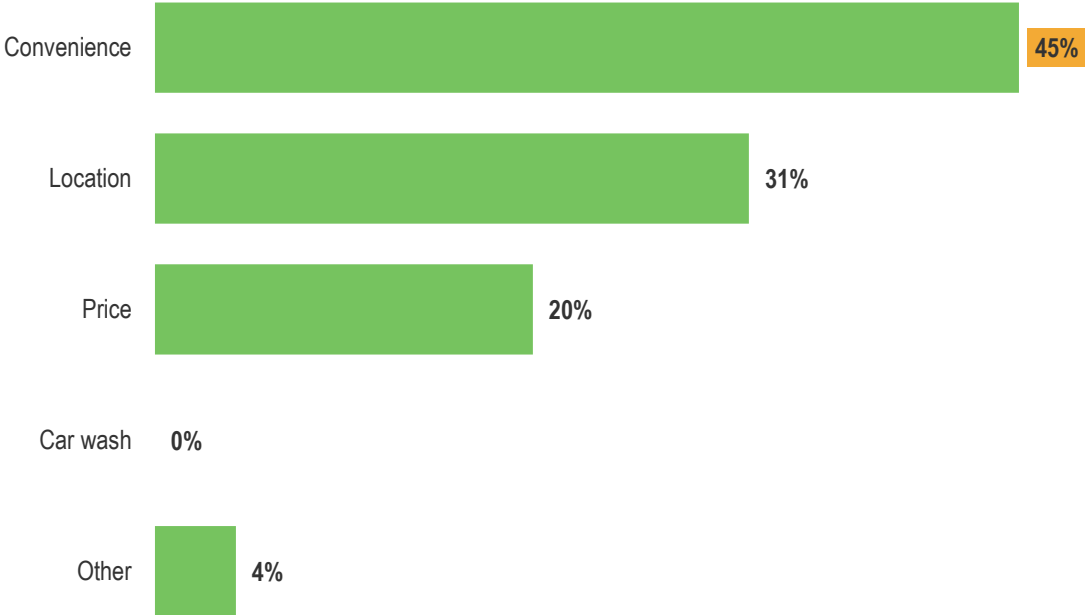
Leisure travelers were more likely than business travelers to cite *convenience* as a reason for selecting their parking option.

Base size: 2022=71; 2019=36 (weighted)  
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 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting



Over half (55%) of passengers obtained their boarding passes on a *mobile phone app*. This is a significant increase from to 2019 (55% vs 40%).

Significantly less passengers this year compared to 2019 got their boarding passes from *airline staff at the counter* or *printed before arriving*.

Visitors were more likely than OC residents to print their boarding pass at an automated kiosk.

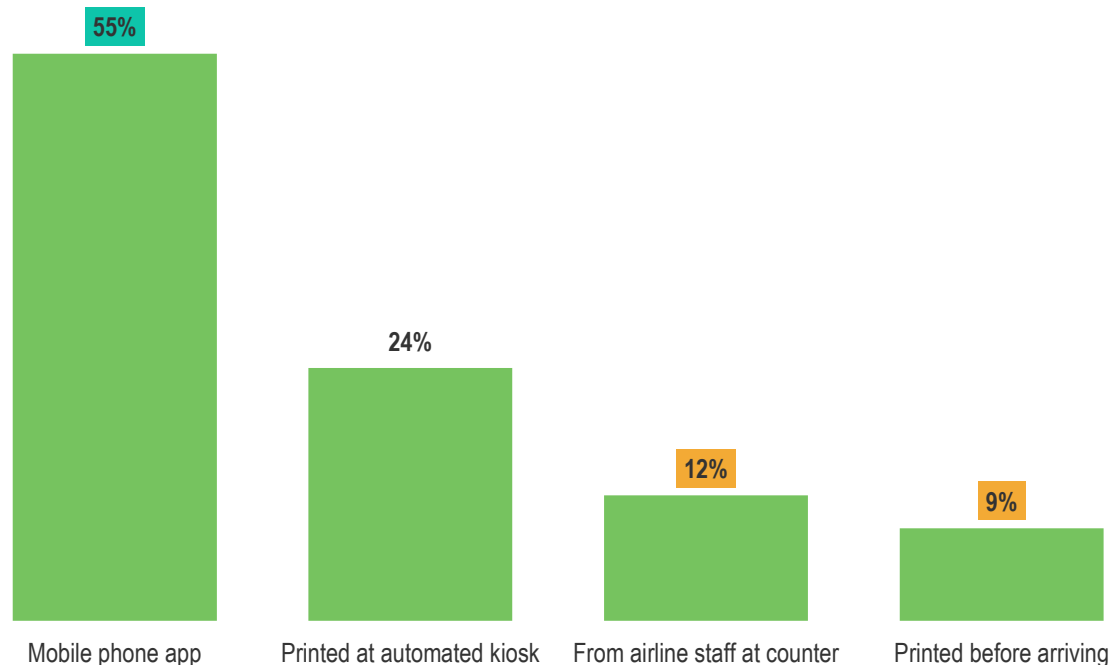
Leisure travelers were more likely to get their boarding passes from *airline staff at counter* or *print before arriving*, while business travelers were more likely to use a *mobile phone app*.

Base size: 2022=505; 2019=599 (weighted)

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 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

Over nine in ten (93%) 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 2019.

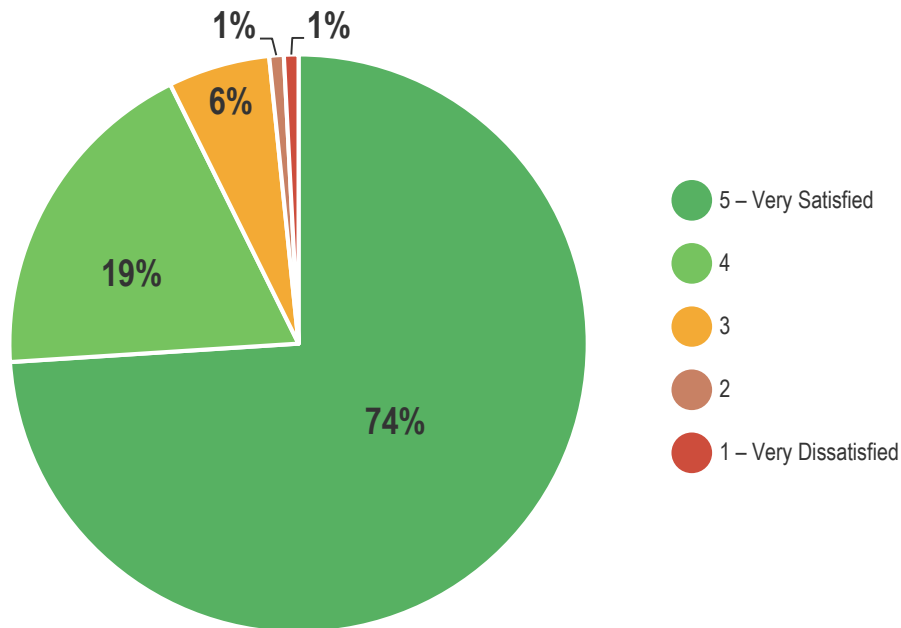
Visitors were significantly more satisfied than passengers who are OC residents with the ease of use of the automated kiosks.

Base size: 2022=123; 2019=156 (weighted)  
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?



## Satisfaction with Automated Kiosk

Among Passengers Who Checked in at Automated Kiosk



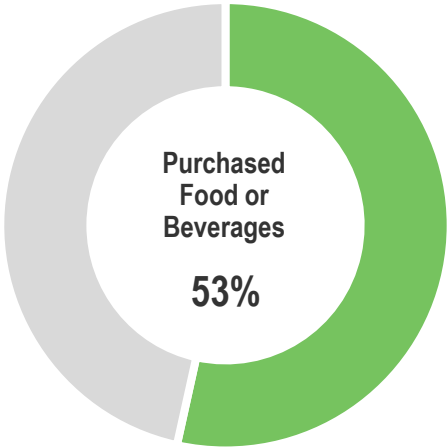
This year's data is compared to data collected in 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

About half (53%) of passengers surveyed report making a food or beverage purchase while at the airport. Two in ten (22%) report making a retail purchase. There was no significant difference in purchases this year compared to 2019.



## Purchases

Among All Passengers



Base size: 2022=505; 2019=599 (weighted)

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?

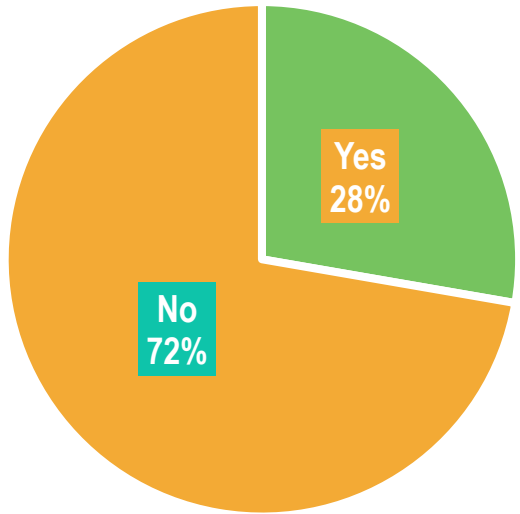
This year's data is compared to data collected in 2019 at the 95% confidence level. Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

Passengers were asked if they had used or tried to use the Wi-Fi while at the airport. About three in ten passengers said they had used or tried to use the Wi-Fi service, which is a significant decrease compared to 2019 (28% vs 36%).



# Use of Wi-Fi

## Among All Passengers



Base size: 2022=505; 2019=599 (weighted)  
Q37. Have you used (or tried to use) the Wi-Fi at John Wayne Airport today?

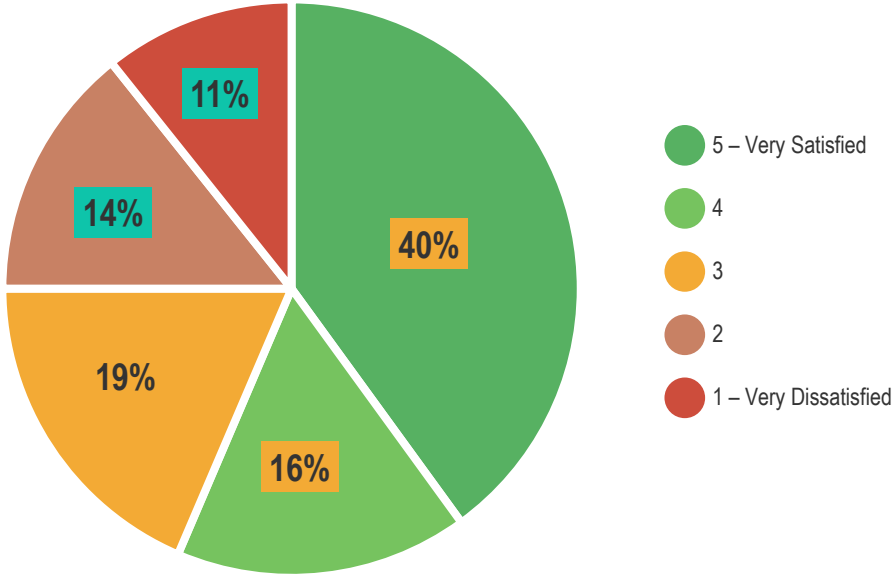
This year's data is compared to data collected in 2019 at the 95% confidence level. Significant differences are indicated by teal (significantly higher) or orange (significantly lower) highlighting

Passengers who had used or tried to use the Wi-Fi were asked how satisfied they were with the service. Just over half were satisfied (Top 2 Box), which is a significant decrease compared to 2019 (56% vs 79%).



# Satisfaction with Wi-Fi

Among Passengers Who Used/Tried to Use Wi-Fi



Base size: 2022=140; 2019=217 (weighted)  
Q38. Were you satisfied with the Wi-Fi service?

This year's data is compared to data collected in 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting



Passengers who said they were satisfied (Top 2 Box) were asked what they liked about the Wi-Fi.

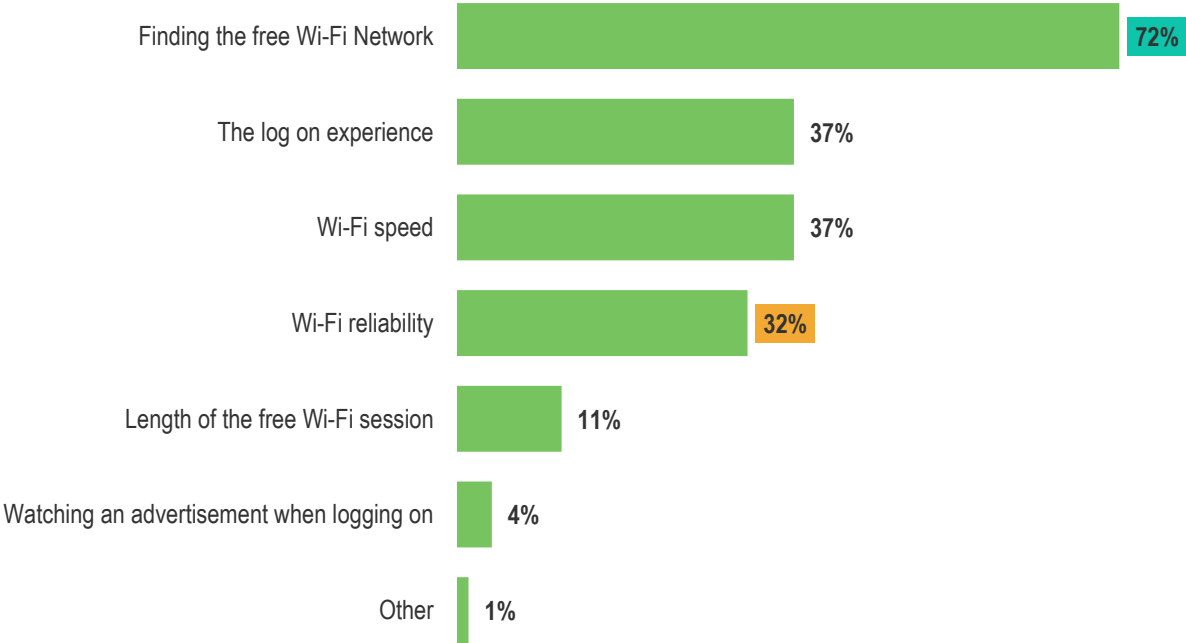
Significantly more passengers this year compared to 2019 cited liking *finding the free Wi-Fi network*, while significantly less selected *Wi-Fi reliability*.

Base size: 2022=79; 2019=172 (weighted)  
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 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

Passengers who said they were dissatisfied (Bottom 2 Box) were asked what they disliked about the Wi-Fi.

The top reason was *Wi-Fi speed*, cited by over three quarters (77%) of dissatisfied passengers. *Wi-Fi reliability* and *the log on experience* were also reasons for dissatisfaction.

Note: Base size was too low in 2019 (n=10) for comparison.

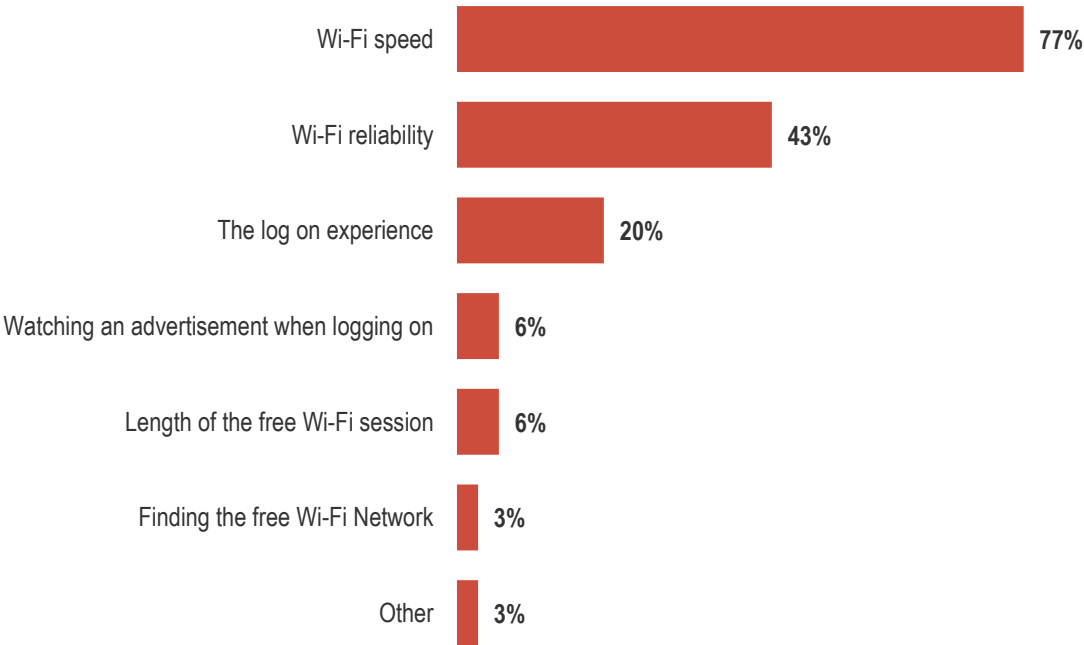
Base size: 2022=35\* low base size

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



## Reasons for Dissatisfaction with Wi-Fi

Among Passengers Giving a Negative Rating (1 or 2)



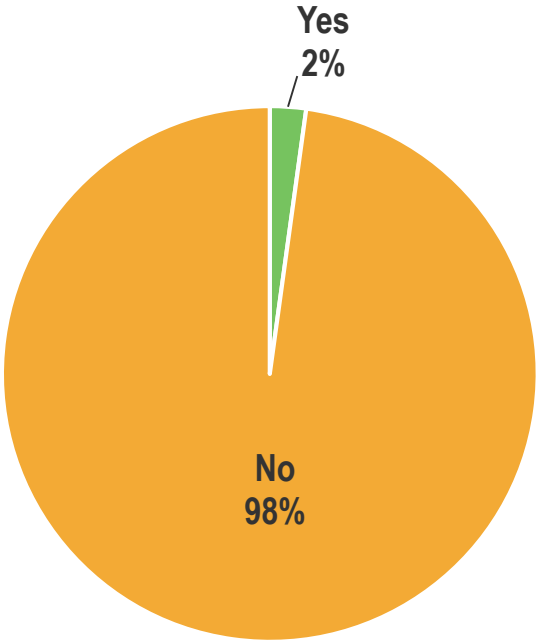
This year's data is compared to data collected in 2019 at the 95% confidence level. Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

Only 2% of passengers surveyed reported visiting or planning to visit the USO lounge while they were at the airport. There was no significant change in USO Lounge use by passengers this year compared to 2019.

Base size: 2022=505; 2019=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 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (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 (42%) passengers said they would use such a lounge. There is no significant change in interest this year compared to 2019.

More business travelers than leisure travelers said they would use a lounge.

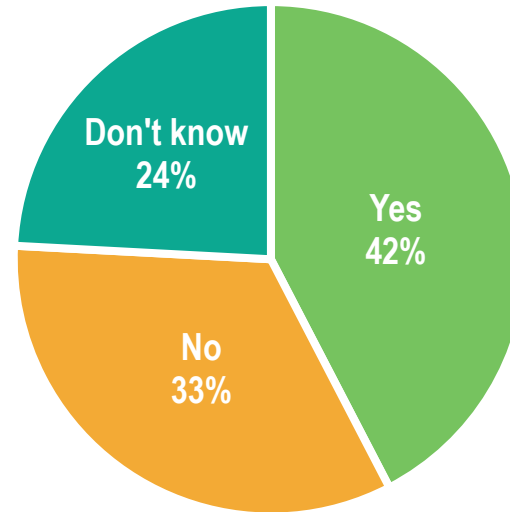
More passengers who are OC residents than visitors said they would use a lounge like the one described.

Base size: 2022=505; 2019=599 (weighted)

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 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (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. Less than one in ten said there are services/products they would like to see offered, which is a significant decrease compared to 2019 (8% vs 19%).

Significantly more OC residents than visitors said there were products/services they would like to see offered.

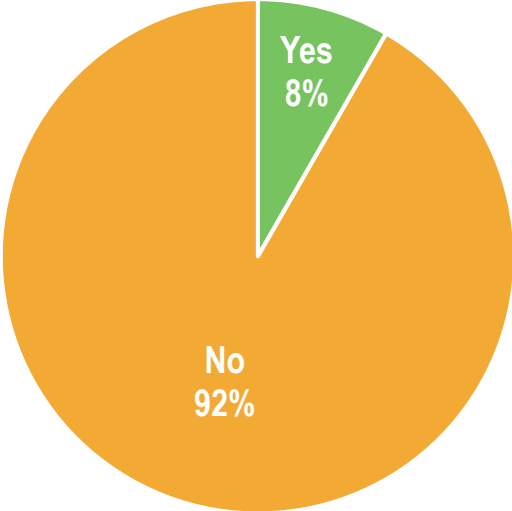
Base size: 2022=505; 2019=599 (weighted)

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 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

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).

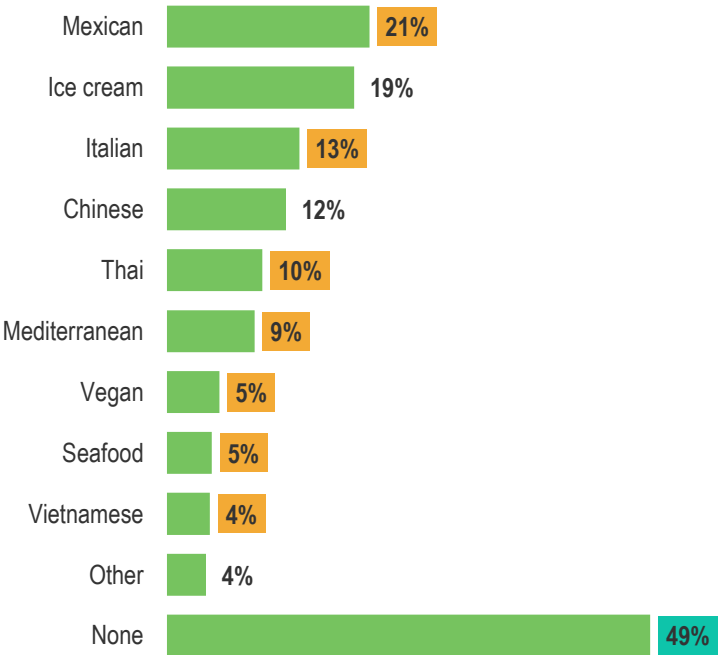
About half of passengers did not want any of the listed food venues. This is a significant increase compared to 2019 (49% vs 29%). Of those that did want food venues added, the top desires were *Mexican* and *ice cream*.

Base size: 2022=505; 2019=599 (weighted)  
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



This year's data is compared to data collected in 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (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 half of passengers did not want to see any of the listed brands of coffee offered. This is a significant increase compared to 2019 (59% vs 41%). Among those that did want coffee offered, *Starbucks* was the most desired.

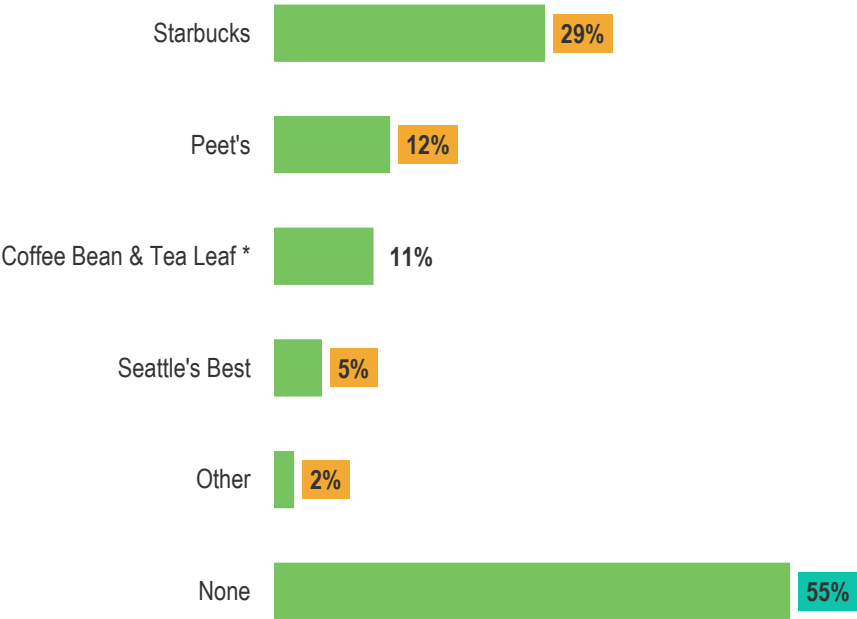
Significantly more OC residents than visitors wanted to see *Coffee Bean & Tea Leaf* offered.

Significantly more business travelers than leisure travelers did not want to see any coffee brands offered.

Base size: 2022=505; 2019=599 (weighted)  
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



\* Added this year

This year's data is compared to data collected in 2019 at the 95% confidence level.  
Significant differences are indicated by teal (significantly higher) or orange (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).

Seven in ten passengers did not want to see any of the listed retail offerings added to JWA. This is a significant increase compared to 2019 (70% vs 53%). Of those that did want to see retail added, *travel products/luggage* and *theme park* were most desired.

Residents were more likely than visitors to want *designer* retail offerings.

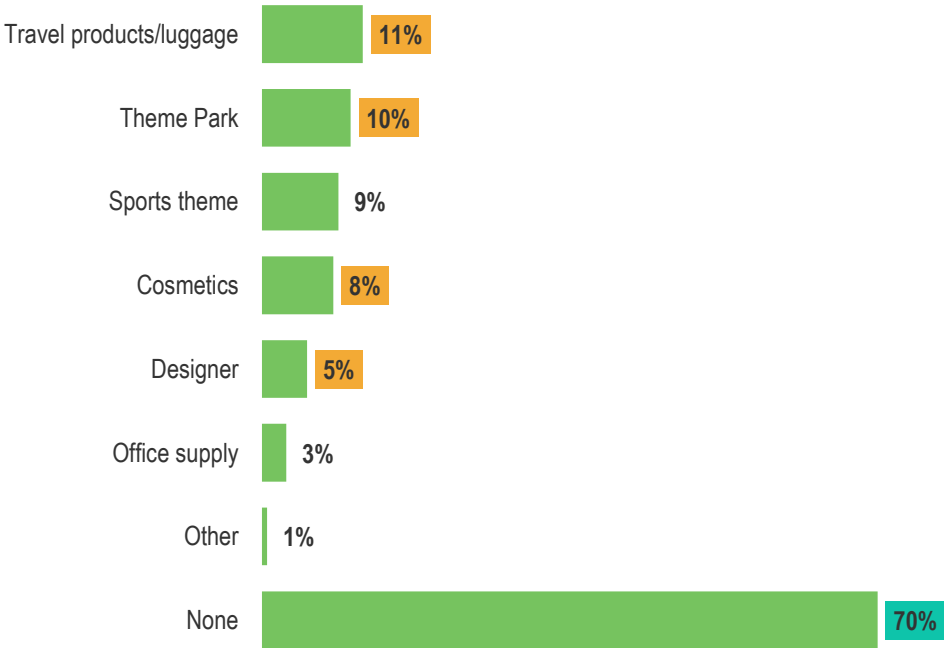
Significantly more business travelers than leisure travelers did not want any of the listed retail offerings added.

Base size: 2022=505; 2019=599 (weighted)  
Q44. What types of retail would you like to see added to JWA? Select all that apply.



## Retail Additions Desired

Among All Passengers



This year's data is compared to data collected in 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting



Passengers were asked how the rental car experience could be improved (they were allowed to select multiple responses).

About eight in ten (79%) passengers said the rental car experience is fine and nothing needs to be improved.

Among those who felt there could be improvements, *location* and *signage to location* were the top improvements.

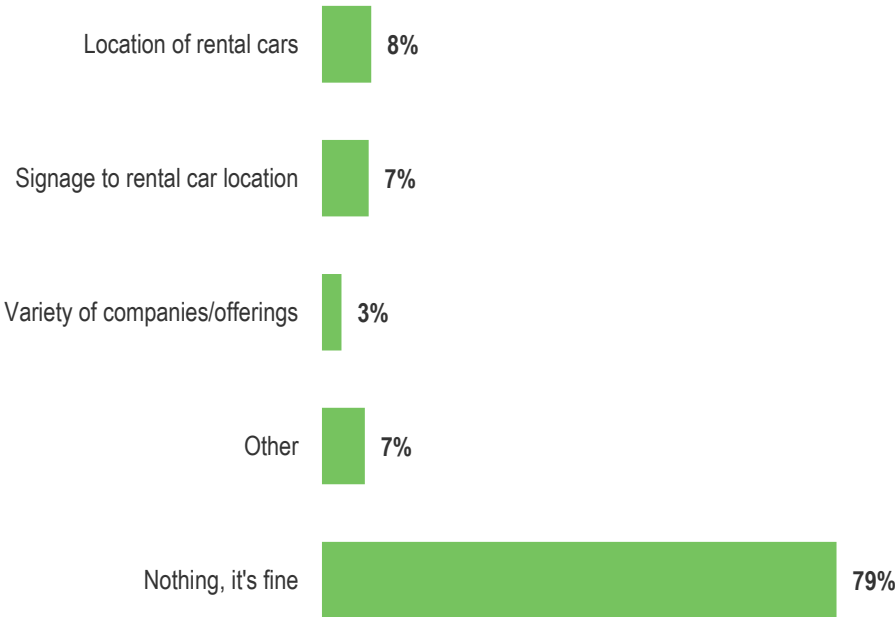
There were no significant differences this year compared to 2019.

Significantly more residents than visitors said that the experience could be improved by offering a *variety of companies/offerings*.

Base size: 2022=505; 2019=599 (weighted)  
Q45. How can we improve your rental car experience? Select all that apply.



## Rental Car Experience Improvements Among All Passengers



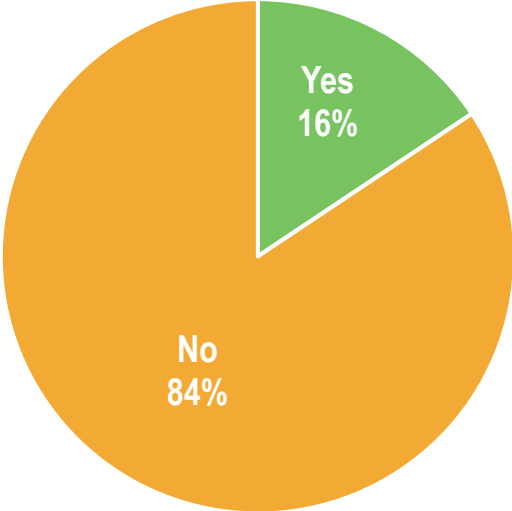
This year's data is compared to data collected in 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

Among passengers at JWA this year, 16% reported using the digital screen after TSA security to locate food, retail or services in the Terminal.



## Use of Digital Screen

Among All Passengers



Base size: n=505

Q51. Did you use the digital screen after TSA security to locate food, retail or services in the Terminal?

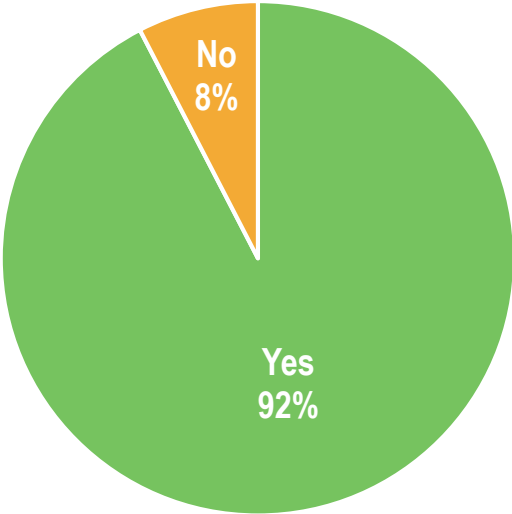
This question was added in 2022; no previous year comparisons can be made

Among passengers who used the digital display, nine in ten (92%) found it helpful.



## Helpfulness of Digital Screens

Among Passengers who Used the Digital Screens



Base size: n=79  
Q53. Did you find the digital display screens helpful?

This question was added in 2022; no previous year comparisons can be made



## Resident Online Survey Results



Out of 1,120 online sample panelists contacted, 652 (58%) had flown by air in the past 12 months. Of those, 517 (79%) had flown out of John Wayne Airport in the past 12 months.

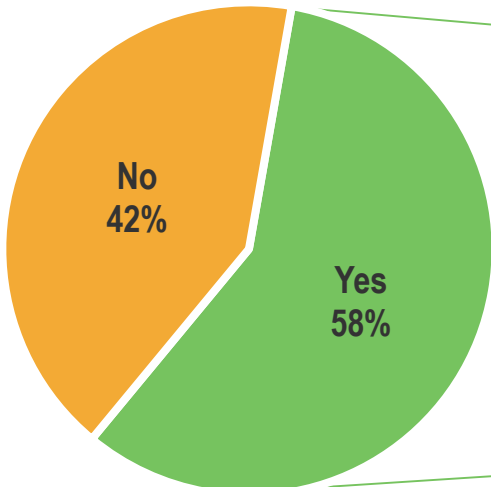
This yields an incidence rate of 46% of residents having flown through JWA in the past 12 months among all contacted panelists (18+) in Orange County.



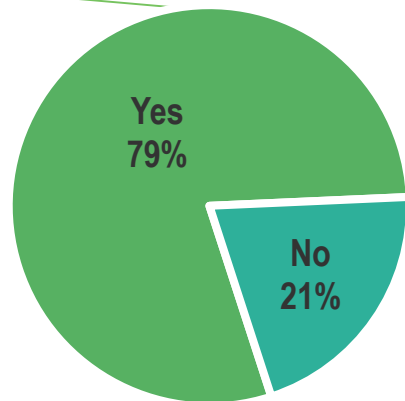
# Travel Frequency

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?

Q4. 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). Half (51%) of Orange County residents are very satisfied (rating a 5 out of 5).

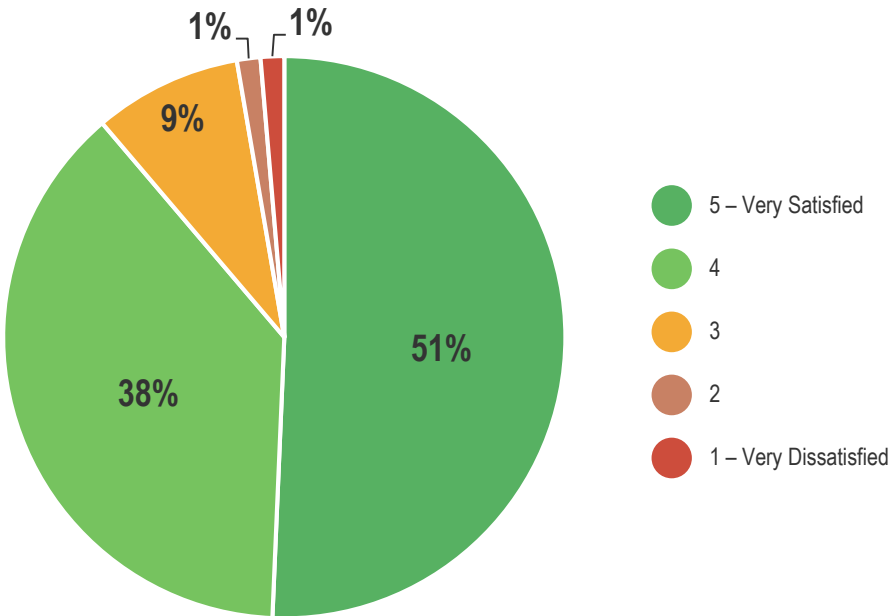
There is no significant difference in satisfaction this year compared to 2019.

Base size: 2022=517; 2019=400

Q14. 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 Residents



This year's data is compared to data collected in 2019 at the 95% confidence level. Significant differences are indicated by teal (significantly higher) or orange (significantly lower) highlighting

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

Residents this year were significantly more satisfied compared to 2019 with many airport services:

- Security screening process
- Cleanliness of airport parking structures
- Variety of air carriers
- Parking
- Quality of news, gift, and other retail services
- Information booth service
- Airport art exhibits
- Courtesy Shuttles / Door-to-Door Shuttles
- Rental car service
- Taxi service from the airport
- Valet parking service

*Base sizes vary*

Q14. 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

**Top 2 Box (Rating 4/5)**  
*Ranked Highest to Lowest for 2022*

	2019	2022
Cleanliness of airport terminals	88%	87%
Making you feel safe and secure in the terminals	87%	86%
Cleanliness of airport restrooms	84%	85%
Overall customer service provided by everyone working at the airport	84%	84%
Signage of airport terminals and roadways	81%	83%
The security screening process	75%	81%
Cleanliness of airport parking structures	74%	80%
The amount of time it takes to get through security checkpoints	75%	79%
Being treated in a courteous and professional manner by TSA security screening staff	74%	78%
The variety of air carriers	68%	76%
Being treated in a courteous and professional manner by airport police	69%	74%
Parking	56%	70%
The quality of news, gift, and other retail services of John Wayne Airport	59%	68%
The quality of food and beverage services at John Wayne Airport	64%	68%
Information booth service	55%	64%
Services provided by Uber, Lyft, or Wingz	59%	63%
Airport art exhibits	54%	61%
Courtesy Shuttles / Door-to-Door Shuttles (Not hotel shuttles)	45%	52%
Rental car service	42%	51%
Taxi service from the airport	43%	51%
Valet parking service	34%	49%

This year's data is compared to data collected in 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

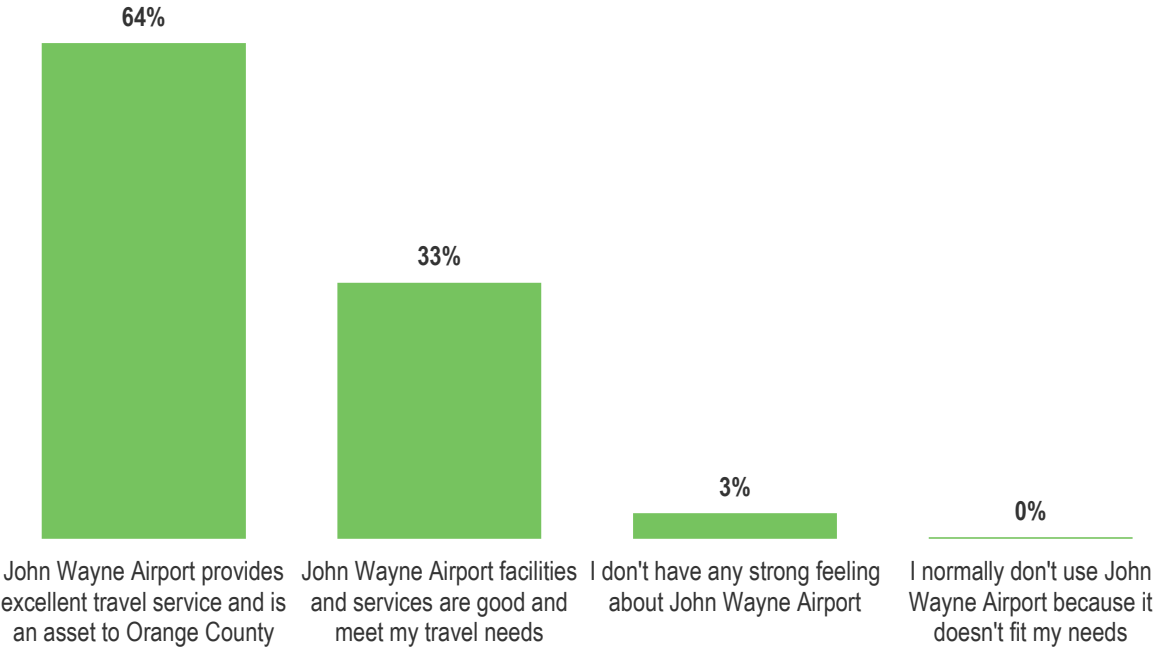
About two thirds (64%) of residents feel that JWA provides *excellent travel service and is an asset to Orange County*, and another third (33%) feel that *JWA facilities and services are good and meet my travel needs*.  
There is no significant difference between this year and 2019.

Base size: 2022=517; 2019=400  
Q16. 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 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting



Among residents, John Wayne Airport has a Net Promoter Score of 53, which is considered very good.

There are no significant differences between this year and 2019.

- 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: 2022=517; 2019=400

Q21. 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
63%	27%	10%

*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 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

The most-used source of information about John Wayne Airport is still *airline/airport websites*, followed by *Expedia*.

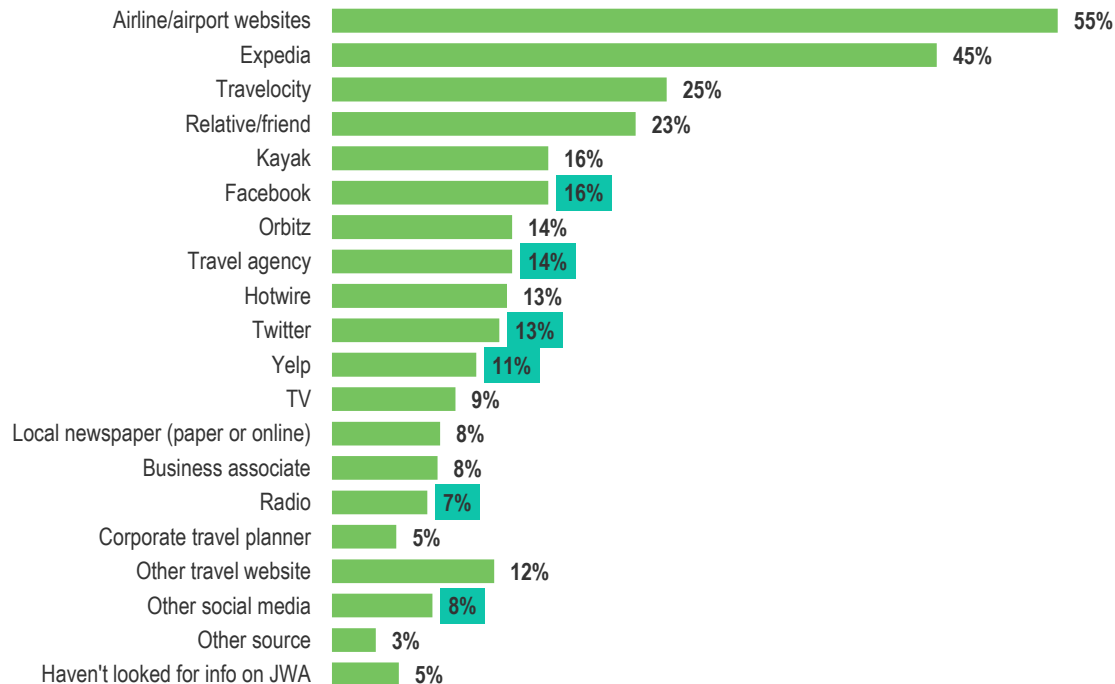
Significantly more residents this year compared to 2019 report getting information about JWA from *Facebook*, *travel agency*, *Twitter*, *Yelp*, *radio*, and *other social media*.

Base size: 2022=517; 2019=400

Q5. 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 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

The base size for this question is 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*.

Note: Base size was too low in 2019 (n=22) for comparison.

\* low base sizes

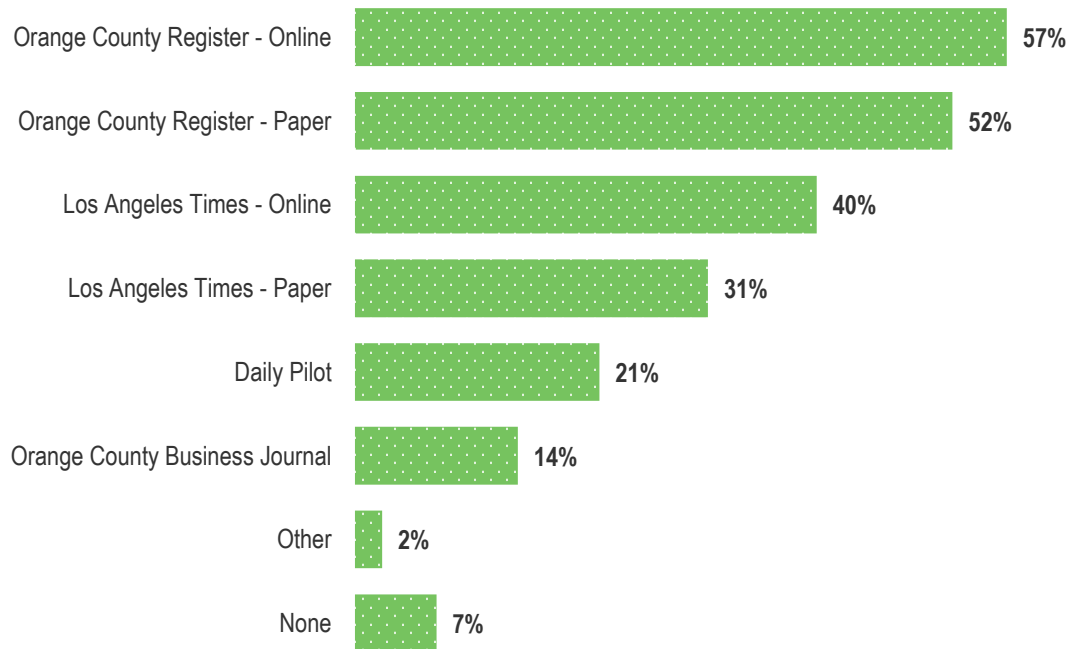
Base size: 2022=42\*; 2019=22\*

Q6. 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



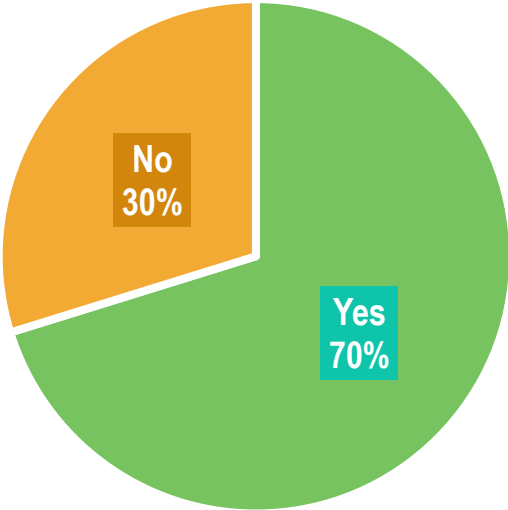
This year's data is compared to data collected in 2019 at the 95% confidence level. Significant differences are indicated by teal (significantly higher) or orange (significantly lower) highlighting

Seven in ten (70%) Orange County residents who flew out of SNA in the past 12 months have visited the John Wayne Airport website. This is a significant increase compared to 2019.



## JWA Website Visits

Among All Residents



Base size: 2022=517; 2019=400

Q7. Have you ever visited the website for John Wayne Airport?

This year's data is compared to data collected in 2019 at the 95% confidence level. Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

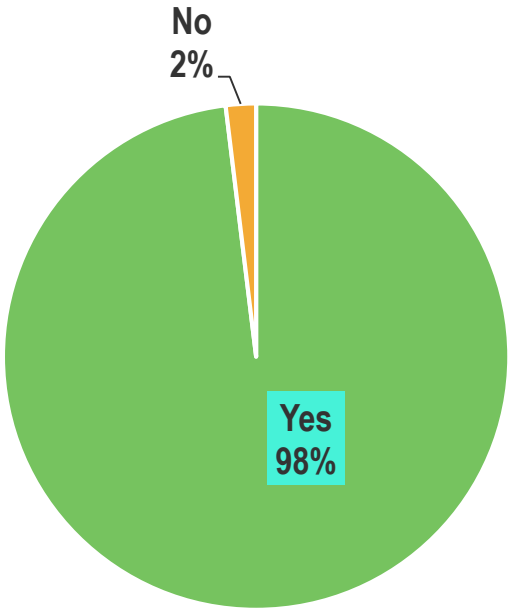
Nearly all (98%) residents who visited the JWA website report being able to find the information they needed. This is a significant increase compared to 2019.

Base size: 2022=517; 2019=242  
Q8. 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 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

Residents were asked to give their primary reason for choosing John Wayne Airport.

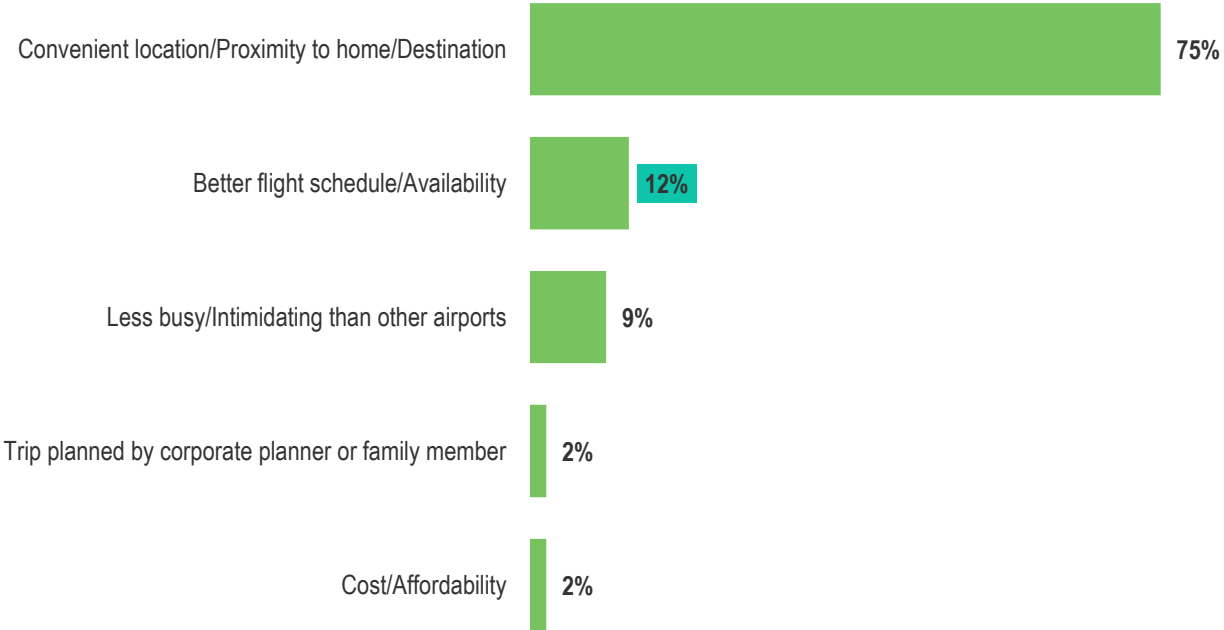
The top reason is still *convenient location/proximity to their home or destination* (75% vs 79% in 2019).

Significantly more residents this year compared to 2019 say they chose JWA because of *better flight schedule/availability*.



## Reason for Choosing John Wayne Airport

Among All Residents



Base size: 2022=517; 2019=400

Q10. What is your primary reason for choosing John Wayne Airport?

This year's data is compared to data collected in 2019 at the 95% confidence level. Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

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

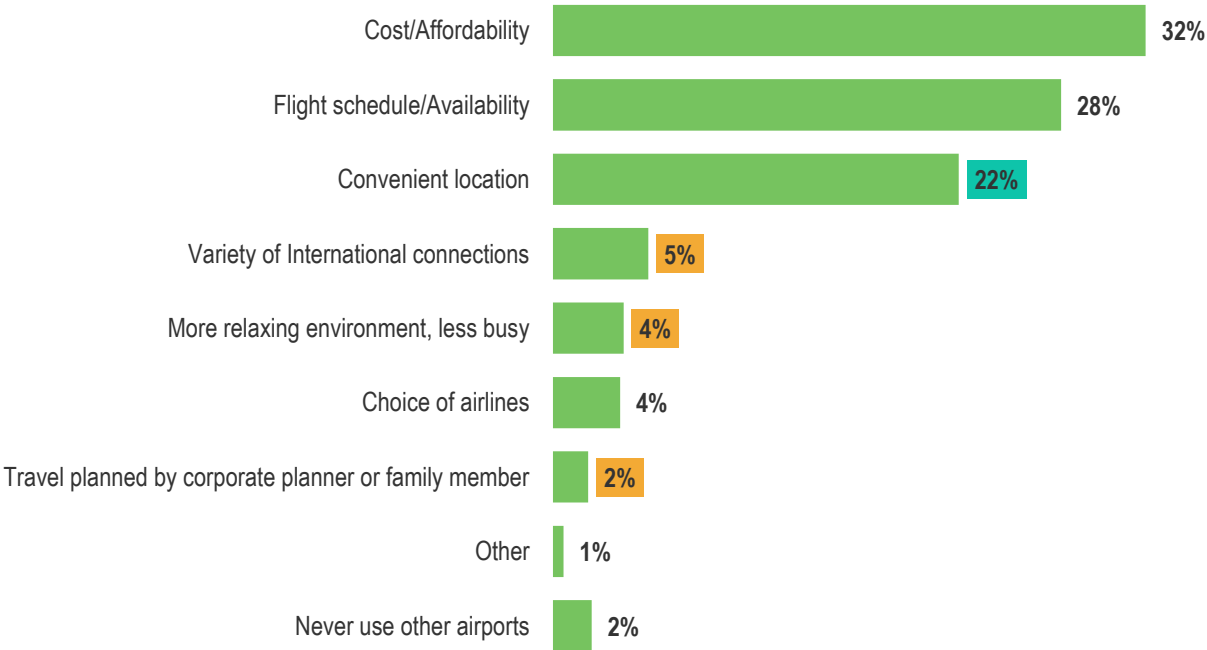
There was a significant increase in residents choosing other airports because of *convenient location*, and a significant decrease in residents selecting other airports because of *variety of International connections*, *more relaxing environment/less busy*, and *travel planned by corporate planner or family member*.

Base size: 2022=517; 2019=400  
Q11. 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 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

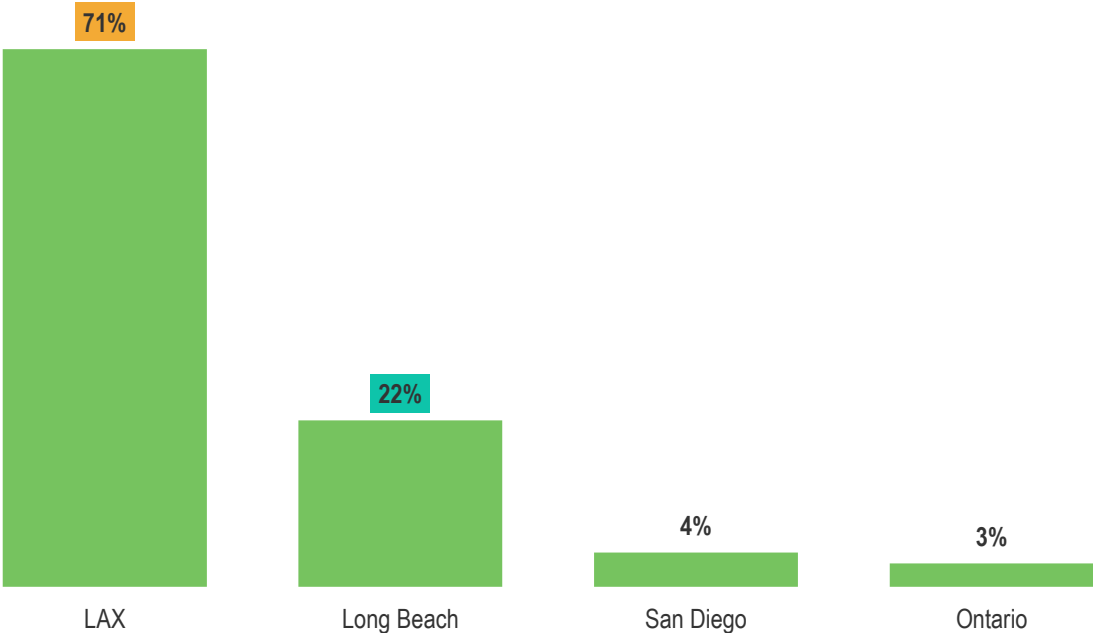
Among those who use airports other than JWA, *LAX* is by far the most-used among OC residents.

Those saying they use *LAX* most often decreased significantly compared to 2019, and those using *Long Beach* increased.



## Other Airport Used Most Often

Among Residents that Use Other Airports



Base size: 2022=490; 2019=389  
Q12. What other airport do you use most often?

This year's data is compared to data collected in 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting



About eight in ten (81%) Orange County residents surveyed report having made a food or beverage purchase at the airport in the last year.

Just over half of residents (52%) report having made a purchase of magazines, gifts, or other items at the airport in the last year.

There is no significant difference between this year and 2019.

Base size: 2022=517; 2019=400

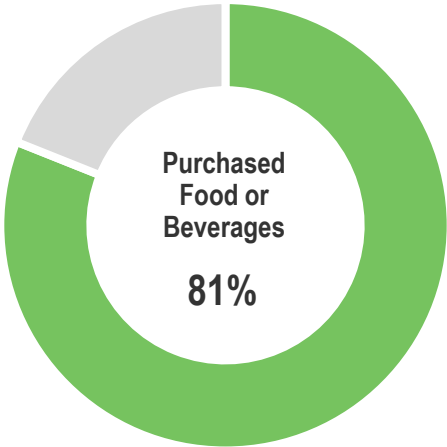
Q19. Have you purchased any food or beverages at John Wayne Airport in the last year?

Q18. 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 2019 at the 95% confidence level.  
Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting

Two thirds (66%) of Orange County residents were aware that John Wayne Airport provides non-stop international service. Four in ten (42%) were aware of both Canada and Mexico, which is a significant increase compared to 2019.

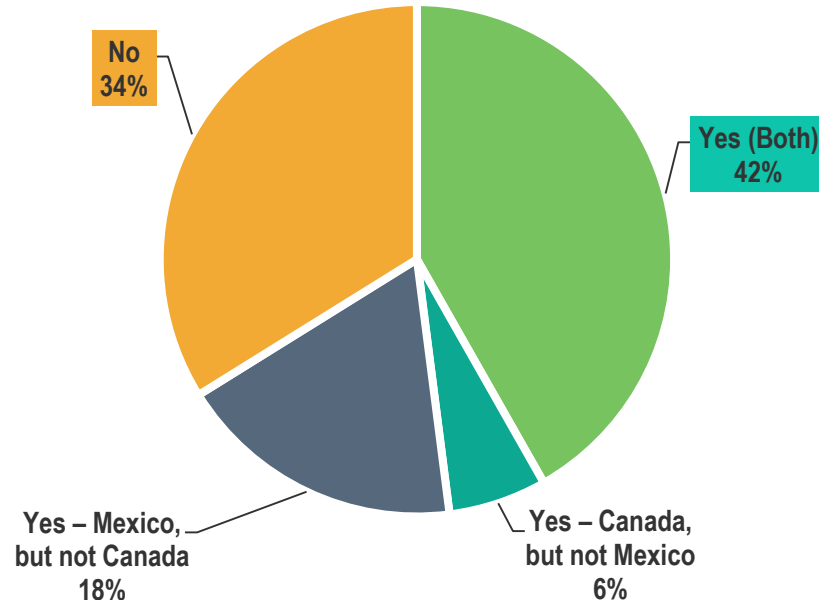
One third were not aware of international non-stop service, which is a significant decrease compared to 2019.

Base size: 2022=517; 2019=400

Q13. 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 2019 at the 95% confidence level. Significant differences are indicated by **teal** (significantly higher) or **orange** (significantly lower) highlighting



## Demographic Profiles



# Demographics – Passenger Onsite Survey

	2019	2022
Sample Size	599	505
<b>Q50: Gender</b>		
Male	41%	53%
Female	59%	46%
Other	-	1%
<b>Q46: Age</b>		
Average (Mean)	46.5	44.7
18 – 24	8%	9%
25 – 34	21%	19%
35 – 44	17%	20%
45 – 54	18%	23%
55 – 64	20%	21%
65 and older	15%	8%
<b>Q49: Household Income</b>		
Average (Mean)	\$117.5k	\$135.6k
Under \$50,000	15%	9%
\$50 - \$99,999	31%	21%
\$100 - \$149,999	24%	28%
\$150 - \$199,999	15%	24%
\$200,000 +	16%	18%
<b>Q6: Resident of Orange County</b>		
Resident	26%	32%
Visitor	74%	68%

	2019	2022
Sample Size	599	505
<b>Q14: Primary Purpose of Trip</b>		
Business	26%	31%
Pleasure/Leisure	53%	55%
School/Education	1%	4%
Military	0%	0%
Personal	17%	7%
Other	3%	3%
<b>Q27: Flown out of JWA Past 12 Months (incl. today)</b>		
Average (Mean)	3.0	4.6
1	51%	35%
2	18%	18%
3	10%	13%
4	4%	7%
5	2%	4%
6	4%	4%
7	2%	3%
8	1%	1%
9	1%	1%
10 - 15	4%	5%
16 - 20	1%	3%
Over 20	1%	5%

	2019	2022
Sample Size	599	505
<b>Q47: Primarily English Household?</b>		
Yes	93%	92%
No	7%	8%
<b>Q48: Primary Language Spoken in Home</b>		
Sample Size	44	40
Spanish	37%	58%
Chinese (Mandarin)	9%	18%
Korean	0%	5%
Vietnamese	12%	5%
Chinese (Cantonese)	18%	3%
Other	25%	13%

This year’s data is compared to data collected in 2019 at the 95% confidence level.  
Significant differences are indicated by teal (significantly higher) or orange (significantly lower) highlighting

# Demographics – Resident Online Survey

	2019	2022
Sample Size	400	517

### Q33: Gender

Male	46%	50%
Female	54%	50%
Other	-	1%

### Q29: Age

Average (Mean)	41.4	41.2
18 – 24	17%	16%
25 – 34	25%	26%
35 – 44	17%	23%
45 – 54	18%	12%
55 – 64	14%	13%
65 and older	10%	11%

### Q32: Household Income

Average (Mean)	\$105.6k	\$102.0k
Under \$50,000	19%	19%
\$50 - \$99,999	35%	38%
\$100 - \$149,999	25%	23%
\$150 - \$199,999	12%	11%
\$200,000 +	11%	9%

	2019	2022
Sample Size	400	517

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

Average (Mean)	2.4	2.3
1	48%	50%
2	28%	25%
3	10%	9%
4	7%	6%
5	1%	3%
6	1%	1%
7	2%	1%
8	1%	1%
9	0%	0%
10 - 15	2%	2%
16 – 20	0%	0%
Over 20	1%	0%

	2019	2022
Sample Size	400	517

### Q30: Primarily English Household?

Yes	97%	95%
No	4%	5%

### Q31: Primary Language Spoken in Home

Sample Size	14	27
Spanish	50%	48%
Vietnamese	7%	11%
Chinese (Mandarin)	14%	11%
Korean	0%	7%
Chinese (Cantonese)	0%	4%
Other	29%	19%

This year's data is compared to data collected in 2019 at the 95% confidence level.  
Significant differences are indicated by teal (significantly higher) or orange (significantly lower) highlighting

*Thank you!*

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Sports, Auto, Travel and Brands Group

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