

# ANAHEIM RESORT TRANSPORTATION RESTRUCTURING STUDY

**FINAL REPORT**

Dated: November 2012



*Inside front cover*



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## Section 1—Introduction

### Purpose

In August 2011, the Anaheim Transportation Network (ATN), in conjunction with the City of Anaheim, commissioned Transportation Management and Design, Inc. (TMD) to complete the *Anaheim Resort Transportation Restructuring Study*.

The purpose of the *Anaheim Resort Transportation Restructuring Study* is to strategically develop a financially feasible phased service implementation plan to deliver cohesive, efficient, effective, and sustainable transit services in conjunction with the proposed implementation of the Anaheim Regional Transportation Intermodal Center (ARTIC), which is under construction and will be completed in 2014, the Anaheim Rapid Connection (ARC) fixed guideway system, and future implementation of High Speed Rail (HSR) service. .

This document presents the study's findings, framework and guiding principles, and phased recommendations.

### Background

ATN is a private non-profit transportation management association governed by a Board of Directors including members from The Walt Disney Company®, the City of Anaheim, major local hotels, and the Anaheim/Orange County Visitor & Convention Bureau. ATN was established specifically to serve the transportation needs of The Anaheim Resort® and the Platinum Triangle™, as well as to support *The Anaheim Resort Specific Plan* to reduce traffic congestion and air quality impacts in the area.

ATN administers Anaheim Resort Transportation (ART), which provides service to the Anaheim area. ART serves a unique market driven by several major destinations including The Disneyland® Resort, the Anaheim Convention Center, The Shops at Anaheim GardenWalk, Honda Center, Angel Stadium, and the City National Grove of Anaheim.

The study's analysis focused on the ART network in operation at the time the study was initiated (August 2011). As of August 2011, ART operated 16 routes (see Map 1). During the course of the study (April 2012), ART introduced two new routes as well as restructured three routes (Route 2, 15, and 16). Route 2, which provided service to Embassy Suites on South Harbor, was eliminated because Embassy Suites began operating their own shuttle that directly served The Disneyland® Resort. Route 15 was restructured to provide a direct connection between The Anaheim Resort and the Platinum Triangle via Katella Avenue. The southern portion of Route 15 was re-named Route 16. Route 16, which originally served the Anaheim Resort RV Park and Motel 6, was re-named Route 2.

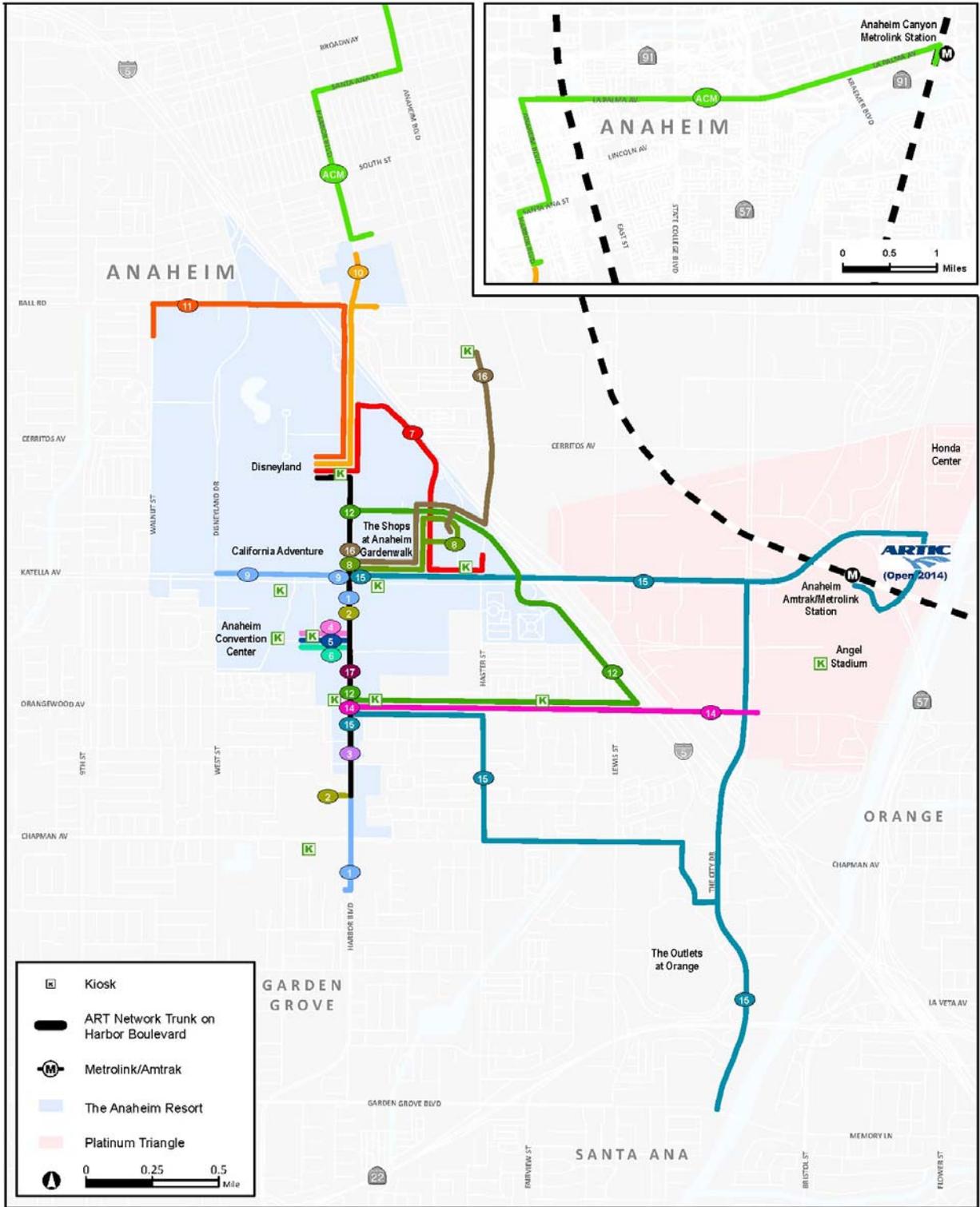


Although the study's analysis focused on the ART network prior to the April 2012 changes, the recommendations build upon the current network (post-April 2012 changes).



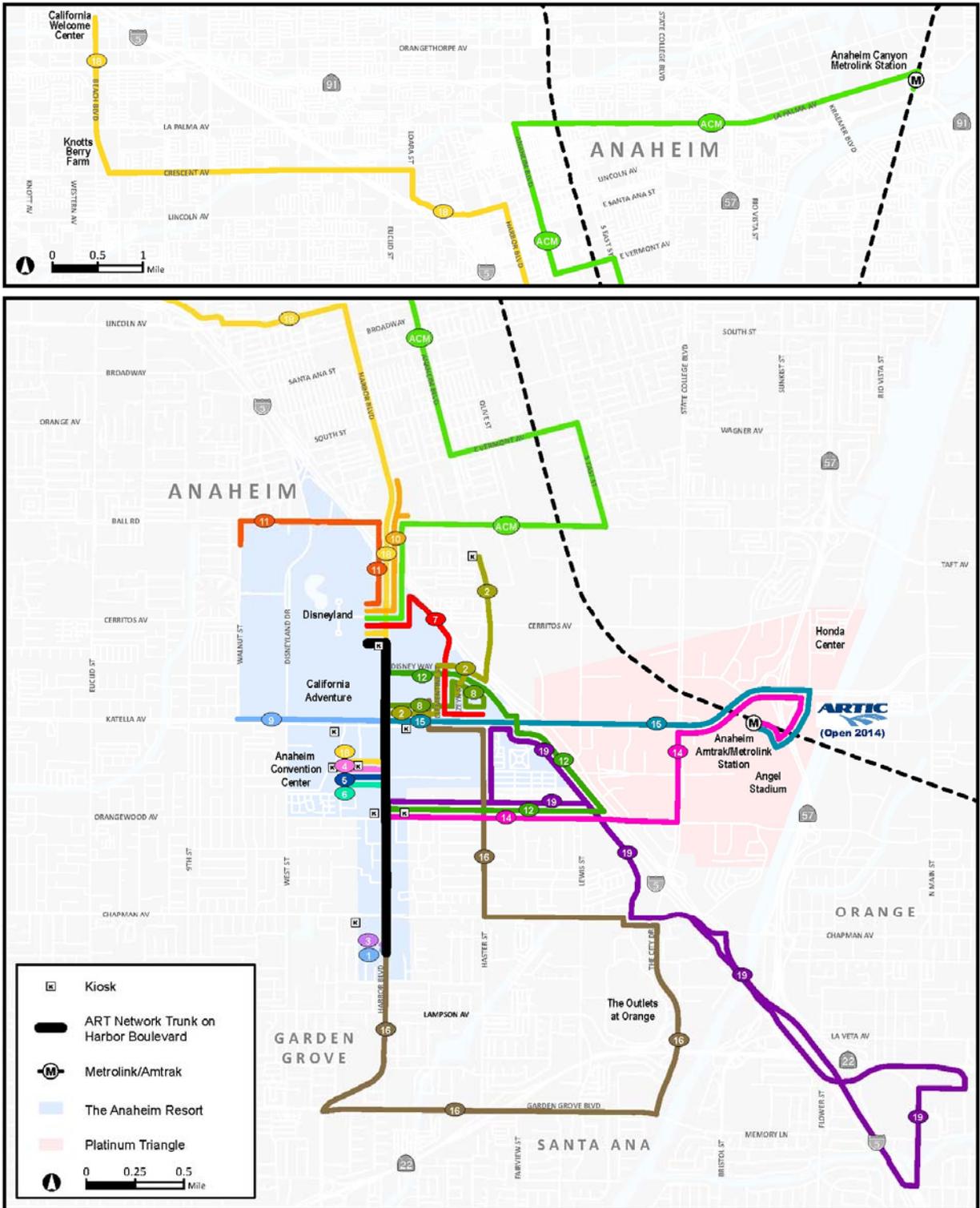
ANAHEIM RESORT TRANSPORTATION RESTRUCTURING

Map 1: ART Service Network (August 2011)





Map 2: ART Service Network (April 2012)





As of April 2012, ART operates 18 fixed-routes, which include:

- Route 1: Serves Disneyland® Resort, Residence Inn Garden Grove, Sheraton Garden Grove/Anaheim South, Travelodge at Anaheim Convention Center, Best Western Raffles, Dolphin's Cove, Anaheim Convention Center, and The Shops at Anaheim GardenWalk via Harbor Boulevard.
- Route 2: Serves Disneyland® Resort, Anaheim Resort RV Park, Motel 6, The Shops at Anaheim GardenWalk, America's Best Value Fantasy Inn, and Ramada Plaza via Anaheim Boulevard, Disney Way, Katella Avenue, and Harbor Boulevard.
- Route 3: Serves Disneyland® Resort, The Shops at Anaheim GardenWalk, Portofino Inn and Suites, Double Tree Guest Suites, Days Inn Maingate, Cortona Inn and Suites, and Ramada Limited Suites via Harbor Boulevard.
- Route 4: Serves Disneyland® Resort, The Shops at Anaheim GardenWalk, Anaheim Convention Center, and Hilton Anaheim via Convention Way and Harbor Boulevard.
- Route 5: Serves Disneyland® Resort, Anaheim Convention Center, Anaheim Marriott, and Courtyard by Marriott via Convention Way and Harbor Boulevard.
- Route 6: Serves Disneyland® Resort, The Shops at Anaheim GardenWalk, Anaheim Convention Center, Sheraton Park Hotel, Clarion Hotel, and Red Lion Hotel via Convention Way and Harbor Boulevard.
- Route 7: Serves Disneyland® Resort, Howard Johnson, Residence Inn Maingate, Peacock Suites, and Greenwood Suites Anaheim Resort via Harbor Boulevard, Manchester Avenue, Clementine and Katella Avenue.
- Route 8: Serves Disneyland® Resort, Islander Inn, La Quinta Inn & Suites, Extended Stay America, Worldmark Anaheim, and The Shops at Anaheim GardenWalk via Harbor Boulevard, Katella Avenue, Clementine, and Zeyn Street.
- Route 9: Serves Disneyland® Resort, The Shops at Anaheim GardenWalk, Anaheim Convention Center, Desert Palm Inn and Suites, Anabella Hotel, Best Western Stovall's Inn, and Best Western Pavilions' via Katella Avenue and Harbor Boulevard.
- Route 10: Serves Disneyland® Resort, Ramada Limited Maingate North, America's Best Inn, Days Inn and Suites, Econolodge, and Harbor RV Park via Harbor Boulevard.
- Route 11: Serves Disneyland® Resort, Hotel M nage, Days Inn Anaheim West, and Holiday Inn Hotel & Suites via Ball Road and Harbor Boulevard.



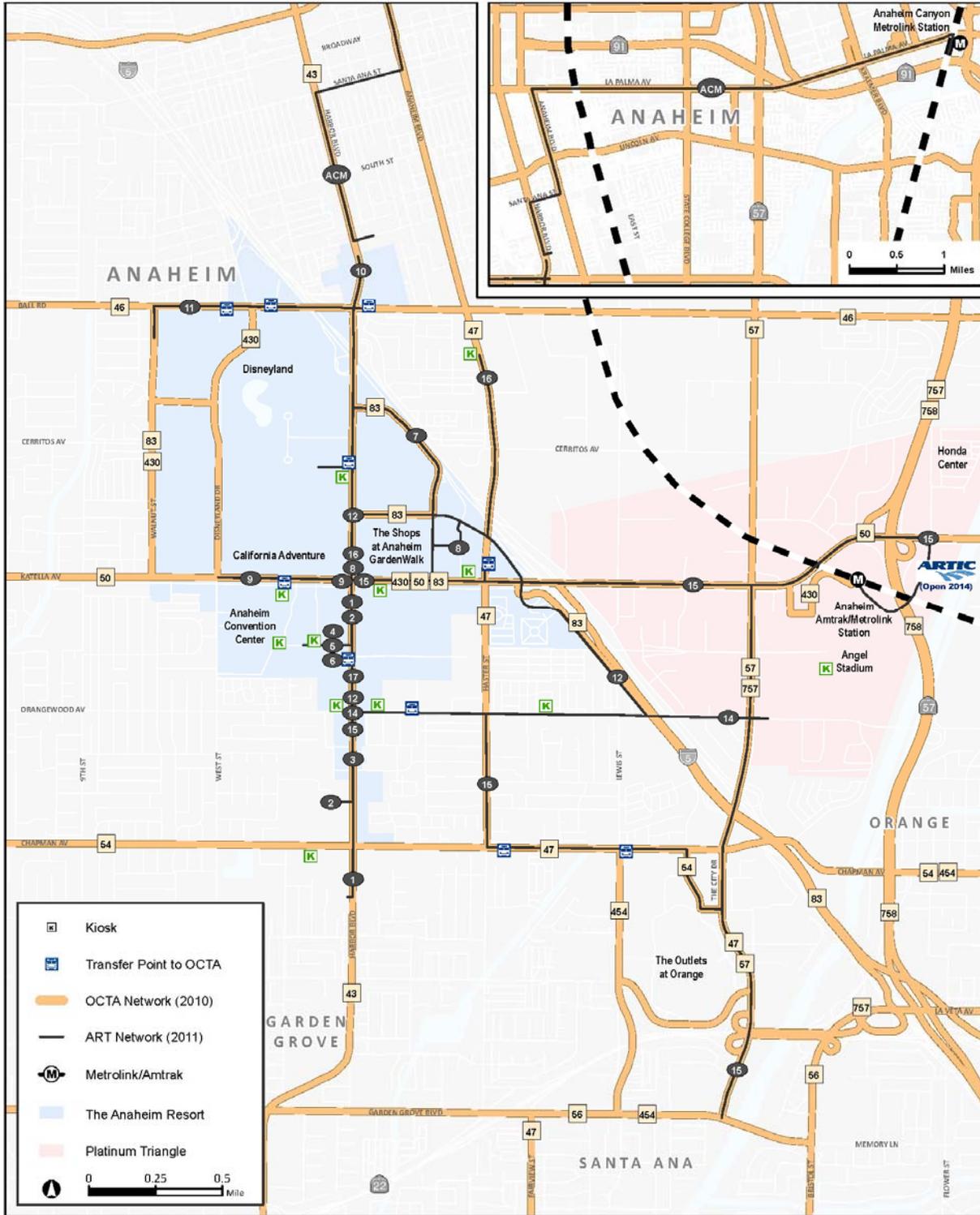
- Route 12: Serves Disneyland® Resort, The Shops at Anaheim GardenWalk, Anaheim Convention Center, Comfort Inn and Suites, Holiday Inn, and Staybridge Inn & Suites via Disney Way, Manchester Avenue, Orangewood Avenue, and Harbor Boulevard.
- Route 14: Serves Disneyland® Resort, The Shops at Anaheim GardenWalk, Anaheim Convention Center, Best Western Raffles, Ayres Hotel, Anaheim Amtrak/Metrolink Station, and Hilton Suites via Harbor Boulevard, Orangewood Avenue, Manchester Avenue, Chapman Avenue, State College Boulevard, and Katella Avenue.
- Route 15: Serves Disneyland® Resort, The Shops at Anaheim GardenWalk, Stadium Lofts, Ayres Hotel, Townplace Suites, and Anaheim Amtrak/Metrolink Station via Katella Avenue and Harbor Boulevard.
- Route 16: Serves Disneyland® Resort, The Shops at Anaheim GardenWalk, Anaheim Convention Center, Crystal Cathedral, The Outlets at Orange, Best Western Meridian Inn & Suites, and Holiday Inn Express via Harbor Boulevard, Garden Grove Boulevard, The City Drive, Chapman Avenue, Haster Street, and Katella Avenue.
- Route 17: Provides connecting service between Disneyland Resort's parking facilities and the Disneyland Resort's main entrance.. This route operates as contracted service between the ATN and Disneyland® Resort. The Disneyland® Resort covers the costs associated with the operation of Route 17; affording the ATN with the ability to provide the service to the public.
- Route 18: Serves Disneyland® Resort, The Shops at Anaheim GardenWalk, Anaheim Convention Center, Wilshire Manor, Anaheim Plaza, Crescent @ North Valley, Dad Miller Golf Course, Knott's Berry Farm, Medieval Times Dinner Theater, Pirate Dinner Adventure, and California Welcome Center.
- Route 19: Serves Disneyland® Resort, The Shops at Anaheim GardenWalk, Anaheim Convention Center, Staybridge Inn & Suites, Holiday Inn, Westfield Main Place, and Discovery Science Center.
- Anaheim Canyon Metrolink (ACM) Rail Feeder Service: Provide peak service connecting the Anaheim Canyon Metrolink Station and Downtown Anaheim. Major stops include Anaheim City Hall, Anaheim Police Department, and City of Anaheim Maintenance Facility on Vermont Street.



Several other transit services operate within The Anaheim Resort and the Platinum Triangle. The Orange County Transportation Authority (OCTA) provides extensive fixed-route bus service throughout the City of Anaheim and Orange County. Map 3 shows the alignment of OCTA routes around the ART service area. The Anaheim Amtrak/MetroLink Station, located in the parking lot of Angel Stadium in the Platinum Triangle, is currently served by the MetroLink Orange County Line and Amtrak services such as the Pacific Surfliner.



Map 3: OCTA Service Network



## Study Approach and Methodology

The ART Restructuring Study is designed to provide a comprehensive understanding of the existing ART system and the market it serves. The findings from the analysis were used to form the restructuring plan, which was developed within the available funding parameters of ART's future budgetary projections.

The following elements were used to create a framework of key issues and guiding principles for the planning and restructuring of the ART system:

1. **Previous Studies and Other Relevant Data:** Studies and other data relevant to the ART transit system were reviewed in order to create baseline information for the restructuring study. To capture the variations in ridership demand, ridership data was collected for calendar year 2010.
2. **Market Assessment and Service Evaluation:** The ART service area was analyzed to determine current transit demand as well as potential for future successful growth. The Market Assessment included: population, employment, land use, demographics, future developments, travel patterns, and a profile of existing ART patrons.

The performance of existing ART services was evaluated in terms of ridership and productivity. Evaluating service performance allows for a financially-sustainable service planning process.

3. **Outreach:** This task involved outreach to stakeholders and community members to share study findings and to receive feedback on the proposed service alternatives. The outreach took place in the form of interviews with stakeholders, the formation of a steering committee, one public meeting in the South District of Anaheim, an online survey for visitors and residents, and regular updates to the ATN Board of Directors.

Stakeholder involvement ensured that ART builds ownership in both the process and the recommendations of the restructuring study.

4. **Governance:** Reviewed the existing and alternative forms of governance the ATN could consider in concert with future need for transportation services, funding needs and other operational scenarios as numerous transportation projects come to fruition.



## Section 2—Data Review

In order to assess and evaluate current market conditions and ART's existing services, a wide variety of data was collected about the City of Anaheim and the ART system. At the time the study was initiated (August 2011), the most up-to-date data available was collected and reviewed. This included ridership data collected from GFI fareboxes (2010 calendar year), Center for Demographic Research Orange County Projections (OCP 2010), Orange County Visitor Intercept Survey (2010), Anaheim Resort Transportation Ridership Survey (Summer 2011), and TransTrack database (2010 calendar year). Additional details and other data sources are outlined throughout this section.

### Previous Studies

Several studies and future projects within Anaheim relevant to ART's current and future service were reviewed:

- **Anaheim Regional Transportation Intermodal Center (ARTIC)** will combine a transportation gateway and mixed-use activity center on a 16-acre site owned by the City of Anaheim. The 67,000 square foot terminal will include multi-modal transit facilities, civic space and retail use. ARTIC is scheduled to open in 2014 and will be served by Metrolink, Amtrak, OCTA bus, ART, shuttles, taxis, and tour and charter buses. ARTIC will also accommodate for future plans for ARC and high-speed trains.

A key component of the ART Restructuring Study was incorporating ARTIC into the service plan based on projected demand for future transportation services. Site plans for the hub were also used to determine potential alignments for ART routes serving ARTIC in the future.

- **Anaheim Rapid Connection (ARC)** fixed-guideway project will connect residents, workers, and visitors, to ARTIC, the Anaheim Convention Center, the Platinum Triangle, and The Anaheim Resort. By serving ARTIC, ARC will provide convenient and efficient transfers to bus, commuter rail, and future high-speed train services. The City of Anaheim has prepared an Alternative Analysis (AA) evaluating Enhanced Bus, Streetcar, and Elevated Fixed-Guideway. On October 23, 2012, the City Council selected the Streetcar Alternative as the Locally Preferred Alternative to evaluate for the environmental documentation.. Final design and construction of the project is scheduled to be completed in 2018.

The Streetcar Alternative was used in the development of service recommendations for this ART Restructuring Study.



- **City of Anaheim Transit Master Plan** outlines how transit in Anaheim will support proposed growth and development in the region, incorporating proposed Go Local concepts and Metrolink expansion plans. A major objective of this study was to define transit feeder routes to improve connectivity to Anaheim's two Metrolink Stations (future ARTIC and Anaheim Canyon Metrolink Station) as well as major employment and activity centers in the City.
- **Anaheim Go Local Step 1 and Step 2** developed a number of concepts to be considered for Project S (Service Connections with Metrolink) and Project V (Community Shuttles) funding strategies.
- **Anaheim Convention Center Grand Plaza Project** is expected to open in January 2013. This project will consist of a pedestrian plaza with up to 100,000 square feet of outdoor programmable space for the Anaheim Convention Center. The plaza will feature landscaping, walkways, water features, street furniture, and lighting to support programs and events.

Several vehicular circulation improvements will be completed as part of the project, modifying the entry and exit areas to the Hilton Anaheim and Anaheim Marriot hotels, which are served by ART. Recommendations will take into account the new circulation improvements.

- **Metrolink Service Expansion Program (MSEP)** allows Metrolink to expand weekday and weekend train service throughout Orange County. Weekday expansion includes six new trains between Fullerton and Laguna Niguel/Mission Viejo on the Orange County Line. Expanded weekend systemwide service includes four additional seasonal round trips on the Orange County Line and one new seasonal trip to the San Clemente Pier on the Inland Empire-Orange County Line. These seasonal trips will run from July 1st through October 9th. The additional service, particularly at the Anaheim Amtrak/Metrolink Station may increase demand for more service connections to The Anaheim Resort. In FY 2011-2012 the Metrolink ridership for Anaheim station was 284,960 and Anaheim Canyon Station was 150,930.
- **California High-Speed Rail Program Revised 2012 Business Plan** (April 2012) provides an update on the ongoing California High Speed Rail Plan after Proposition 1A, the Safe, Reliable High-Speed Rail Bond Act passed in November 2008, transforming the plan into a feasible infrastructure project. Included in this report are updated ridership and revenue projections, a modified operations plan, and potential project cost and payment plans. The report also provided projections for jobs created from the project, and an updated project timeline.

The 2030 forecast of daily boardings at the future ARTIC facility was between 15,800 to 20,300 average daily boardings. Average fares are assumed to be 83 percent of 2009 airfares.



## Other Data Sources

ATN provided numerous data sets for analysis throughout the *Restructuring Study* process. These included:

- **GFI GenFare Transaction Database** (2010 Calendar Year) provides a record for each transaction (boarding) on the ART system. Each record was categorized by date, time of day, fare type, and location. This database was used to create system ridership maps, a fare classification breakdown, time of day ridership analysis, and seasonal ridership analysis for the *Service Evaluation* section of the study.
- TMD assembled a list of current **ART Bus Stops** using the ART website and a set of turn-by-turn route directions provided by ART. By correlating the location of GFI GenFare transactions with the stop locations, boardings were aggregated at a stop level and mapped to show a geographic profile of average daily system boardings for the Service Evaluation.
- **TransTrack Database** provides daily revenue vehicle hours and total vehicle miles for ART bus routes for calendar year 2010. Operating cost allocation and fare revenue information is also included in TransTrack. The data was used to calculate service schedule statistics and performance indicators for each ART fixed route. Service productivity and financial effectiveness were also evaluated at a route level based on time of day and season (peak versus off-peak).
- **Amtrak provided Ridership Forecasts for the Amtrak Surfliner at Anaheim Station.** Ridership was projected for FY2012 through FY2014. These numbers were used when considering future ART service to Anaheim Station. The total Amtrak ridership at Anaheim Station for FY2011 was 354,486 passengers.

*Figure 1: Amtrak Ridership Forecasts*

Fiscal Year	Departures	Arrivals	Totals
FY2012	179,216	183,718	362,934
FY2013	184,592	189,230	373,822
FY2014	190,130	194,907	385,037

- **Orange County Population and Employment Projections** (2010) from the Center for Demographic Research were analyzed and mapped. Areas with higher population and employment densities are more supportive of transit usage.



- **Previous Surveys** including ART Ridership Survey (Summer 2011), Orange County Visitor Intercept Survey (2010), and Metrolink Station Survey (2007) were analyzed and reviewed.
- **Future Development** within Anaheim includes several large-scale transportation, residential, office, and tourist projects. Identifying the intensity and location of these projects helped determine where ART service may be warranted in the future.
- **On-Time Performance** reports provided at a daily system level by MV Transportation, ATN's contracted bus operator, were used to compare system reliability during different periods of time such as holidays, weekends, and peak seasons.
- **OCTA and ATN Fare Structures** were reviewed to identify current fare options for customers and to determine how the fare structures are tailored towards the characteristics of each service.
- **Organizational and Policy Documents** were reviewed to gain a better understanding of ATN's current governance structure. Future governance alternative forms ATN could consider as the organization moves forward were identified.
- **OCTA Bus Network** and its performance were reviewed in order to better understand how passengers are using OCTA services in Anaheim. By understanding OCTA's role within Anaheim, ART service expansions can be planned to compliment OCTA service in the future.



## Section 3— Existing Conditions

The review of existing conditions in Anaheim includes an analysis of existing and future markets, demand patterns, service characteristics, and service performance.

### Market Assessment

#### Purpose

The Market Assessment section of the Existing Conditions task is a key component of the restructuring study. The analysis is intended to identify market characteristics in ART's service area and the areas it surrounds in order to develop service implementation strategies in accordance with ART's governance strategy.

The Market Assessment is intended to answer questions concerning:

- **Key Destinations:** What are the area's key generators of travel (employment, education, retail/commercial, medical, recreation, tourism, et cetera)? How can ART best serve these markets?
- **Visitor Profile:** Who visits Anaheim? Where are visitors coming from? How do they get to Anaheim? What means of transportation do they utilize while in Anaheim?
- **Passenger Profile:** Who rides ART system today and how do the patrons use the system?
- **Community Profile:** What are the population demographics and employment patterns of the ART service area?
- **Travel Patterns:** What are the area's overall travel patterns? Are there new areas where ART might be successful in attracting new demand for services?
- **Future Developments:** Where are future developments expected in-and-around Anaheim, and how can ART potentially serve them?

#### Key Destinations within ART's Service Area

ART serves several key destinations within The Anaheim Resort and the Platinum Triangle such as the Disneyland® Resort, the Anaheim Convention Center, The Shops at Anaheim GardenWalk, Honda Center, Angel Stadium, and the City National Grove of Anaheim. This section of the report provides a brief description of each key destination along with an overview of the Anaheim lodging industry. Approximately twenty million visitors visit the area including and surrounding The Anaheim Resort and the Platinum Triangle each year.



### **The Disneyland® Resort**

The Disneyland® Resort consists of Disneyland® Park, Disney's California Adventure®, and Downtown Disney® District. These destinations are the primary attractions within the ART service area, accounting for the majority of visitors and employees traveling to the area. The Disneyland® Resort employs 23,000 employees, which is approximately 13 percent of the total employment in the City of Anaheim.

Cars Land, a 12-acre addition to Disney's California Adventure® opened on June 15, 2012. This section of the theme park, based on the movies *Cars* and *Cars 2*, includes new attractions along with dining and shopping options. Cars Land is expected to increase attendance, boost hotel occupancy, and therefore ridership on the ART system.

### **The Shops at Anaheim GardenWalk**

The Shops at Anaheim GardenWalk is a major outdoor shopping, dining, and entertainment center located between Katella Avenue and Disney Way, just east of Harbor Boulevard. Popular dining destinations include Bubba Gump Shrimp Co., California Pizza Kitchen, Cheesecake Factory, McCormick & Schmicks Grille, P.F. Chang's China Bistro, and Roy's Hawaiian Fusion Cuisine. Entertainment options include a fitness center, bowling and entertainment center, salon and spa, evening lounge, and movie theater.

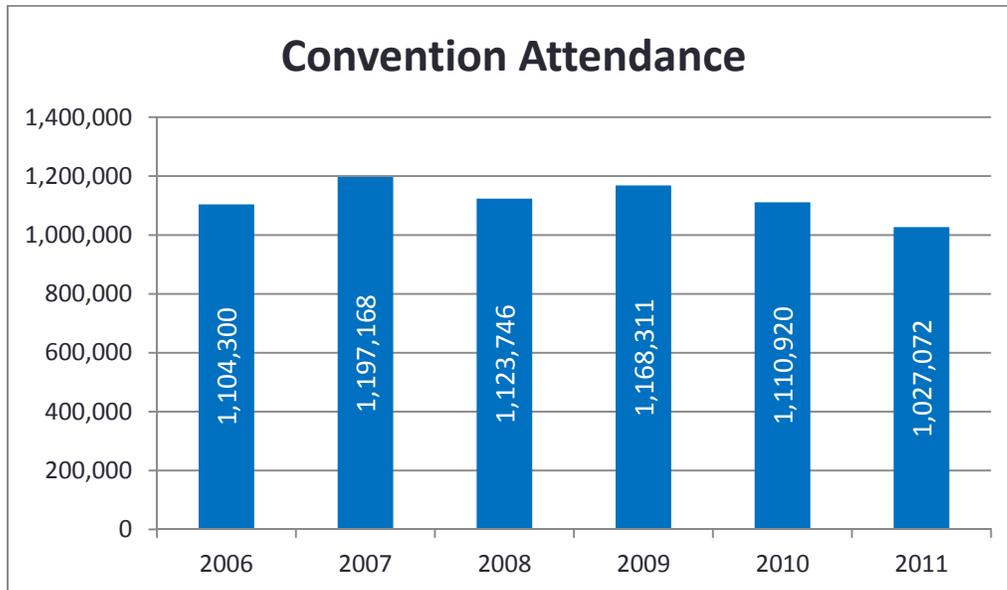


### **Anaheim Convention Center**

The Anaheim Convention Center, located across from the Disneyland® Resort along Katella Avenue, is the largest convention center on the West Coast with over 1.6 million square feet of meeting and exhibit space. From 2006 to 2011, convention attendance has remained steady at about 1.1 million attendees each year (see Figure 2).

***Major conventions generate a significant amount of vehicular traffic, resulting in congestion along Katella Avenue and Harbor Boulevard throughout the duration of these events. Promoting the use of ART for trips within The Anaheim Resort and Platinum Triangle can help alleviate traffic congestion during these major events.***

Figure 2: Convention Attendance



Data Source: Anaheim/ Orange County Visitor & Convention Bureau

### Angel Stadium

Angel Stadium, home to Major League Baseball's Los Angeles Angels of Anaheim, is a 45,000-seat facility that hosts other major sporting events, concerts, and other events. The stadium is located in the Platinum Triangle.

### Honda Center

Honda Center is a 17,174-seat arena primarily used as a hockey arena for the National Hockey League's Anaheim Ducks. Concerts and other events are also held here. The arena is located approximately 3 miles from Disneyland® Resort at the northeast corner of the Platinum Triangle.

*Events at Angel Stadium and Honda Center generate significant congestion along Katella Avenue before and after the events, creating travel delays along the main corridor between The Anaheim Resort and the Platinum Triangle.*

### City National Grove of Anaheim

City National Grove of Anaheim is an indoor venue located next to Angel Stadium and the Anaheim Amtrak/Metrolink Station. The venue holds nearly 1,700 people and hosts live music shows and comedy acts.



## Anaheim Lodging Industry

In 2011, there were a total of 148 hotel properties consisting of nearly 19,610 rooms in the City of Anaheim, which accounted for 35 percent of total rooms in Orange County. The average hotel occupancy rate for Anaheim in 2010 was \$104 per night. The total transient occupancy tax revenue collected by the City of Anaheim in FY2009-10 was \$79.6 million.<sup>1</sup> A majority of these lodging establishments are located within The Anaheim Resort with heavy concentrations along both Harbor Boulevard and Katella Avenue.

*ART should continue to focus on serving the dense concentration of major attractions and key destinations within The Anaheim Resort and the Platinum Triangle.*

## Anaheim Visitor Profile

The Anaheim/Orange County Visitor & Convention Bureau releases an annual profile of visitors to both Anaheim and Orange County based on face-to-face interviews and random telephone surveys. The 2010 study contained data on 3,097 visitor groups with topics covering trip purpose, transportation, accommodations, length of stay, and visitor spending patterns. This section of the study provides a profile of Anaheim visitors based on the 2010 study.

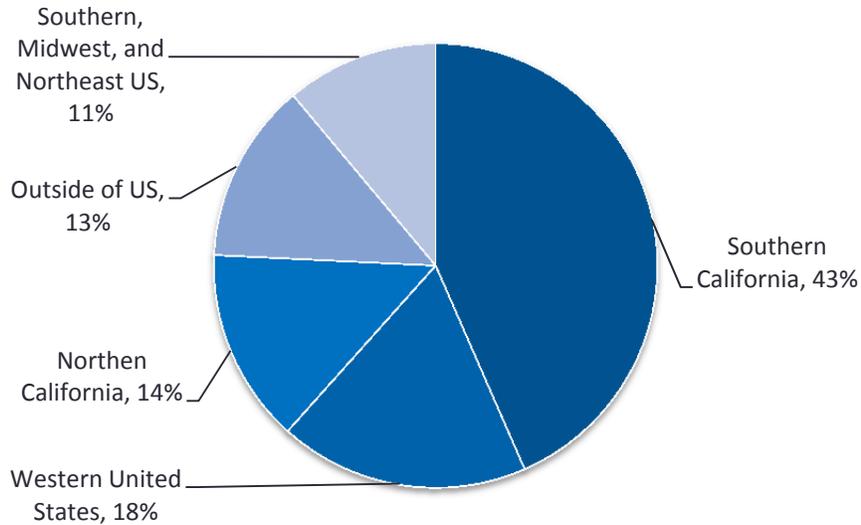
## Anaheim Visitor Origins

According to the Anaheim/Orange County Visitor & Convention Bureau 2010 Annual Visitor Profile, in 2010, there were approximately 15.9 Million visitors to the City of Anaheim. About 43 percent of the visitors originated from Southern California. Additionally, 18 percent were from the Western United States, 14 percent from Northern California, and 13 percent were from outside the United States. Southern, Midwest, and Northeast United States combined for about 11 percent of visitors.

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<sup>1</sup> Source: Anaheim/Orange County Visitor & Convention Bureau (2010 Annual Visitor Profile). At the time of the analysis (Fall 2011 to Spring 2012), the Anaheim/Orange County Visitor & Convention Bureau had not released the 2011 annual visitor profile.

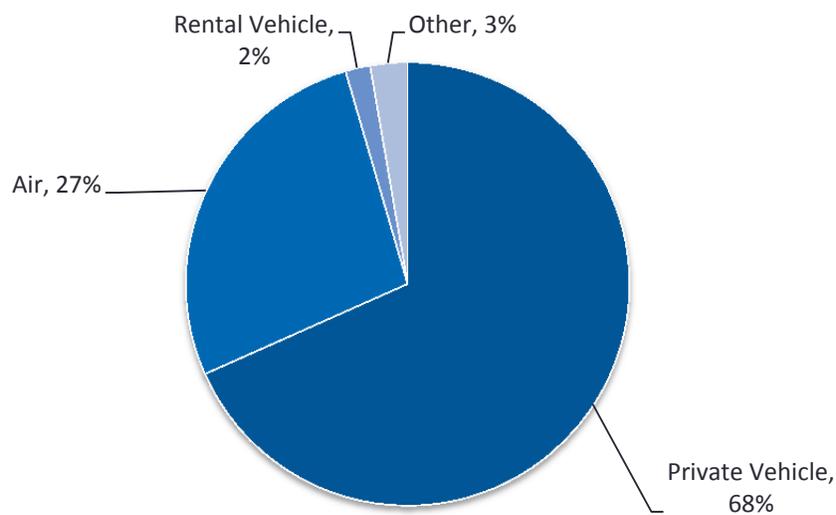
*Figure 3: Anaheim Visitor Origins*



### Mode of Travel

Approximately 68 percent of Anaheim visitors arrived via private vehicle, 27 percent accessed the area through air travel, 1.8 percent using a rental vehicle, while the remaining 2.7 percent arrived using another form of transportation, which included rail and bus.

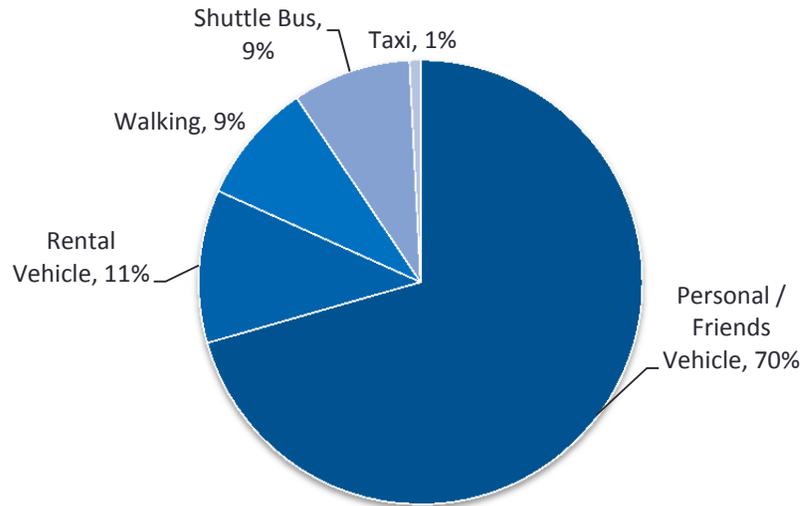
*Figure 4: Mode of Travel to Anaheim*





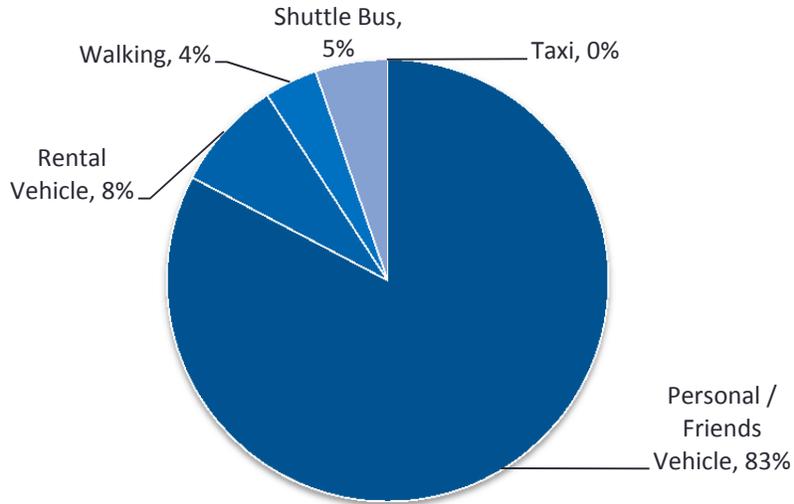
The following shows the overall mode split for Anaheim visitors traveling within the City of Anaheim:

*Figure 5: Mode of Travel within the City of Anaheim*



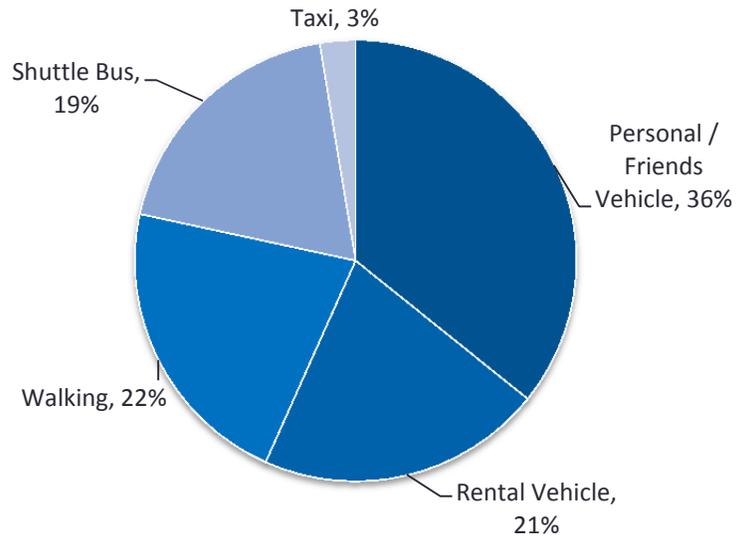
***Overall 9 percent of Anaheim visitors indicated they use Shuttle or Bus service as their primary mode of transportation while in Anaheim, while an additional 9 percent indicated walking as their primary mode of travel.***

**Figure 6: Mode of Travel within the City of Anaheim (Day Visitor Only)**



Overnight hotel guests visiting Anaheim indicated the following as their primary mode of transportation within the City of Anaheim.

**Figure 7: Mode of Travel within the City of Anaheim (Overnight Hotel Guest Only)**





## Visitor Volume and Spending

Approximately 10.6 million of the 15.9 million visitors to Anaheim in 2010 were day visitors (see Figure 8). Although day visitors represented 67 percent of Anaheim visitors, they only accounted for 41 percent of total Anaheim visitor spending. The average day visitor to Anaheim spent approximately \$64 per day.

About 3.8 million (24 percent) Anaheim visitors had hotel/motel accommodations for their stay in 2010. Visitors with hotel/motel accommodations accounted for 51 percent of total Anaheim visitor spending (see Figure 9). Hotel guests spent approximately \$151 per day, and stayed in Anaheim an average of 3.7 nights, spending a total of \$553 per visitor on average.

*Figure 8: Total Visitors to Anaheim by Accommodations*

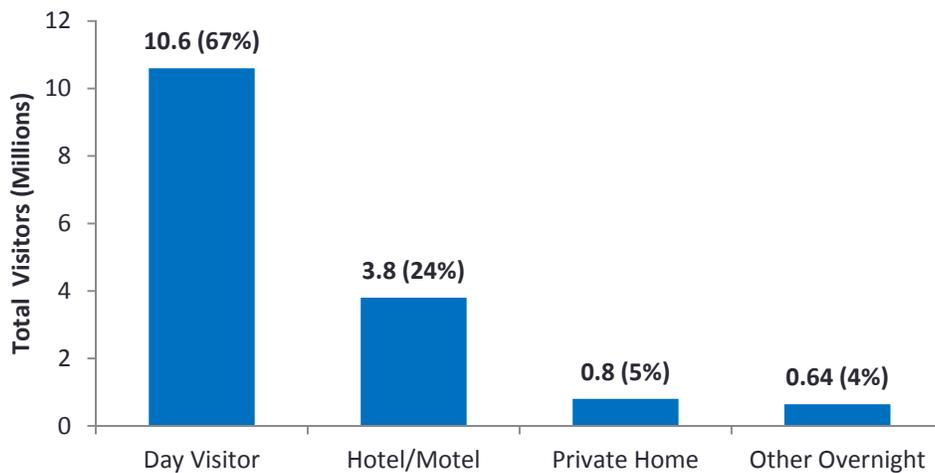
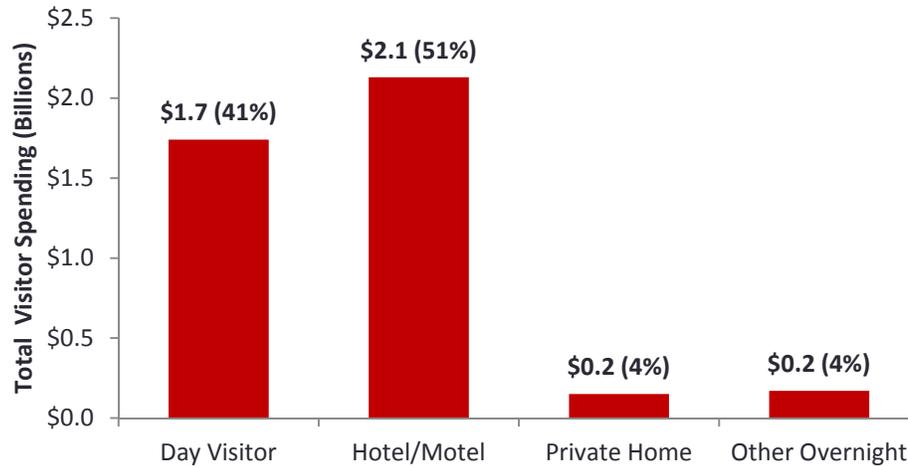


Figure 9: Total Spending by Accommodation



***In general multi-day, overnight visitors spend nearly \$90 more per day than day visitors on a typical trip to Anaheim.***

### Accommodations

Figure 10 shows the Top 5 cities where Anaheim visitors stayed in 2010. Nearly 70 percent of Anaheim visitors had accommodations within the city. Garden Grove, located just south of The Anaheim Resort accounted for approximately 7 percent of visitors. Santa Ana, Buena Park, and Orange rounded out the Top 5 for Anaheim visitors.

Nearly 40 percent of all Orange County visitors stayed in Anaheim. Buena Park and Newport Beach were the only other cities accounting for over 5 percent of Orange County visitor accommodations.

***Anaheim is the most popular city for accommodations among both Anaheim visitors and Orange County visitors.***



*Figure 10: Top 5 Cities where Anaheim Visitors Stay*

Top 5 Accommodation Cities (2010 Anaheim Visitor)	All Anaheim Visitors
Anaheim	69.3%
Garden Grove	6.6%
Santa Ana	4.0%
Buena Park	3.0%
Orange	3.0%

Figure 11 shows the Top 10 hotels where Anaheim visitors stayed in 2010. The corresponding map, Map 4, displays the location of these hotels with respect to ART's service area. The Top 10 hotels where survey respondents stayed were all located within The Anaheim Resort. The Disneyland® Hotel and Disney's Grand California® Hotel accounted for over 25 percent of visitor accommodations. The Marriot and Hilton located along Convention Way were also popular responses, accounting for nearly 14 percent and 8 percent of the accommodations, respectively.

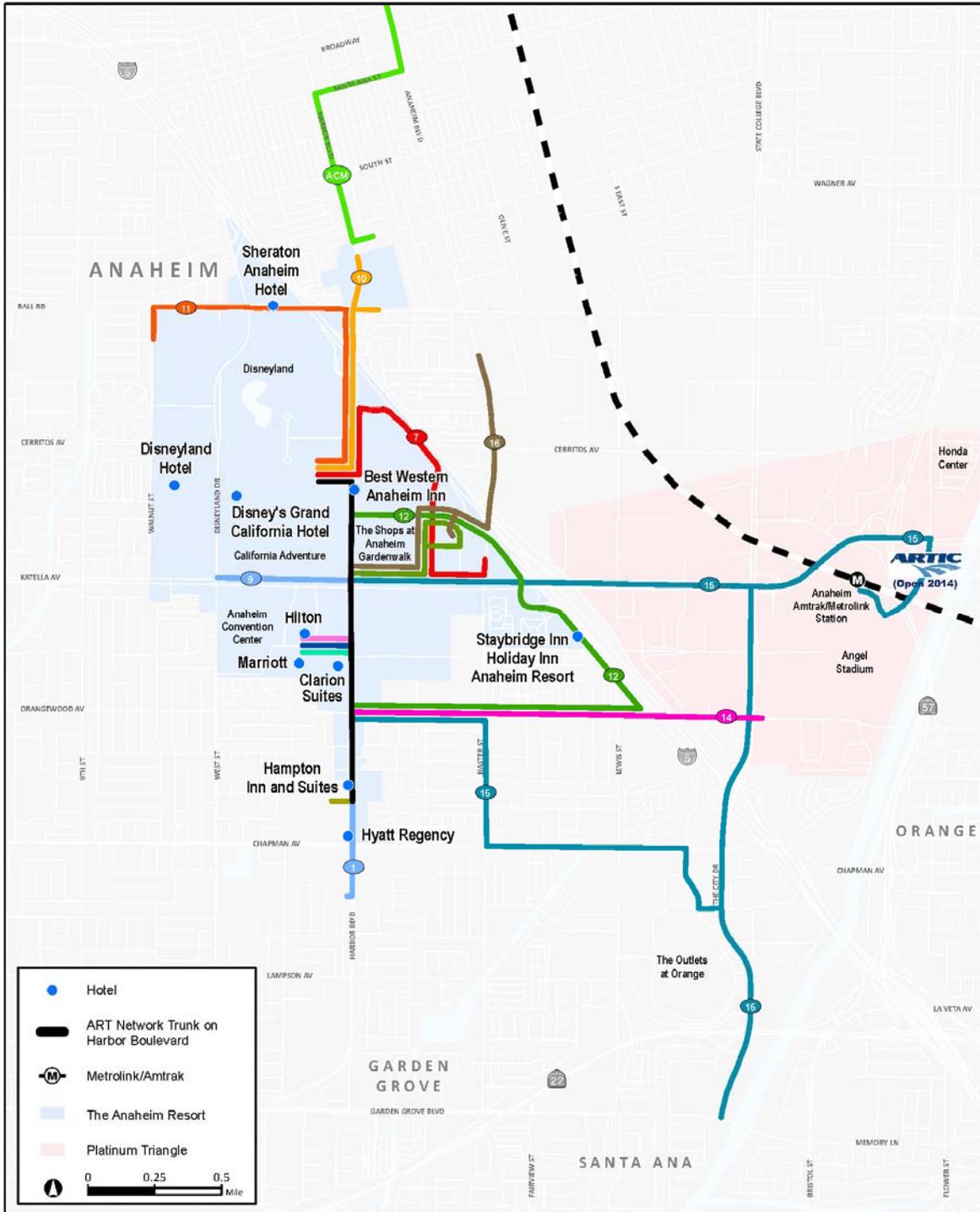
*Figure 11: Top 10 Hotels where Anaheim Visitors Stayed*

Top 10 Hotels (2010 Anaheim Visitor)	All Anaheim Visitors
Disneyland® Hotel	14.3%
Anaheim Marriott	13.5%
Disney's Grand California® Hotel	13.3%
Hilton Anaheim	8.2%
Best Western Anaheim Inn	3.5%
Staybridge & Holiday Inn Anaheim Resort	3.4%
Sheraton Anaheim Hotel	3.3%
Hyatt Regency Orange County	2.9%
Hampton Inn and Suites	2.6%
Clarion Hotel	2.6%

***The most popular hotels among Anaheim visitors in 2010 are located adjacent to Disneyland® (Disneyland® Hotel and Disney's Grand California® Hotel) or adjacent to the Anaheim Convention Center (Anaheim Marriott and Hilton Anaheim). These four hotels accounted for nearly 50 percent of accommodations.***



Map 4: Top 10 Hotels (2010 Anaheim/Orange County Visitor & Convention Bureau Survey)





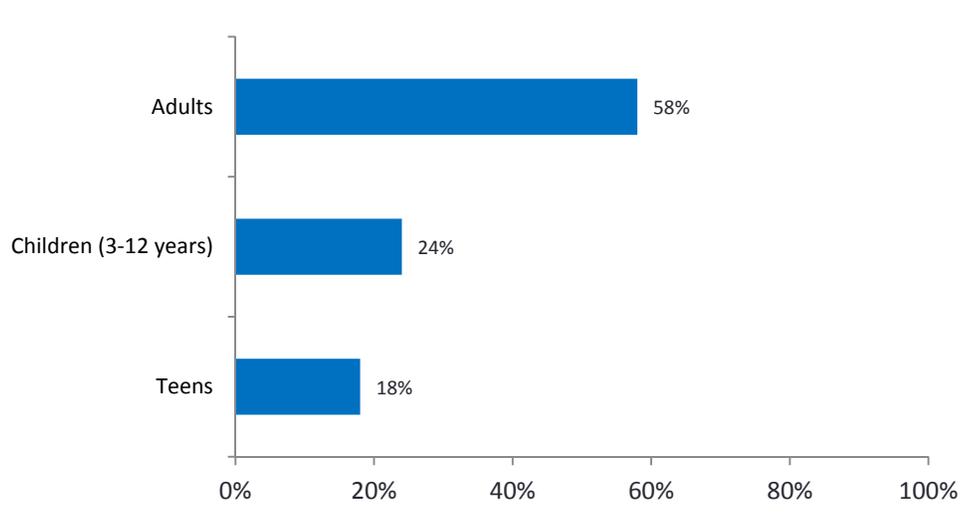
## ART Passenger Profile

ART conducted an on-board survey between July 13 and July 17, 2011. A total of 562 surveys representing 2,838 visitors were completed. This section provides a profile of the current ART rider based on the 2011 on-board survey.

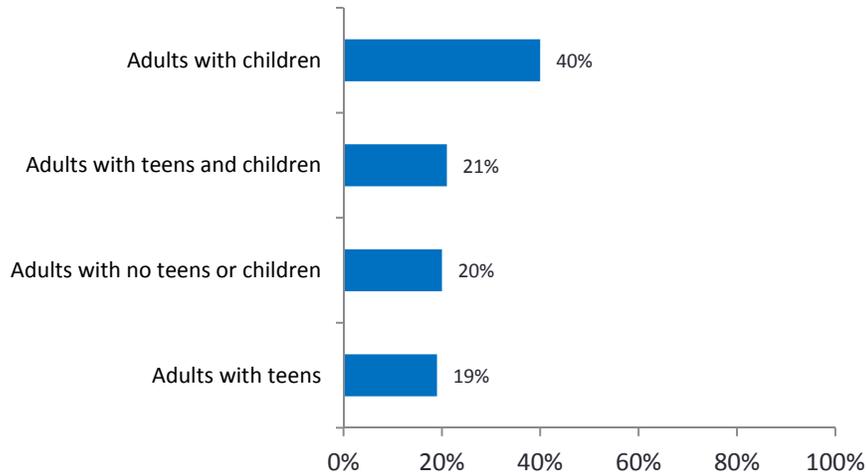
### Passenger Demographics

Approximately 58 percent of ART riders are adults. Additionally, 24 percent are children between the ages of 3-12 and 18 percent are teens (see Figure 12). Figure 13 shows the breakdown of how many adult passengers ride with children, teens, or by themselves.

Figure 12: ART Passenger Type



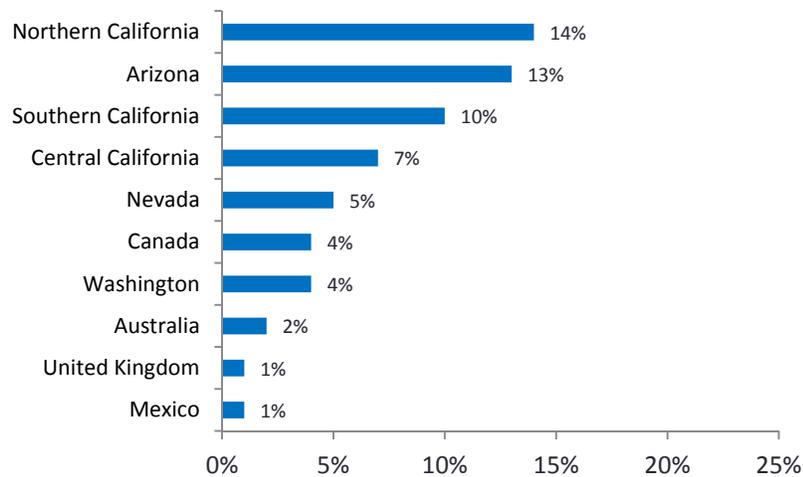
**Figure 13: ART Riders Traveling with Children and/or Teens**



### Rider Origins

Northern California residents represent the highest percentage of ART riders, accounting for approximately 14 percent. Residents from Arizona account for a similar share of ART ridership, with 13 percent. About 10 percent of passengers are residents of Southern California and 7 percent are from Central California (see Figure 14).

**Figure 14: ART Rider Origins**

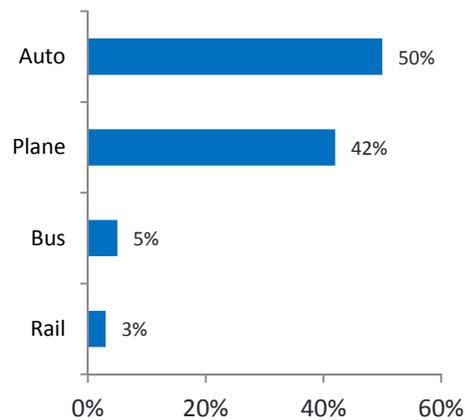




## Mode of Travel

Driving was the most popular mode of travel to The Anaheim Resort for ART riders represented in the survey, accounting for nearly 50 percent (see Figure 15). About 42 percent of visitors accessed Southern California/Orange County via airplane. Only 5 percent of riders traveled by bus, and even fewer traveled using rail (3 percent).

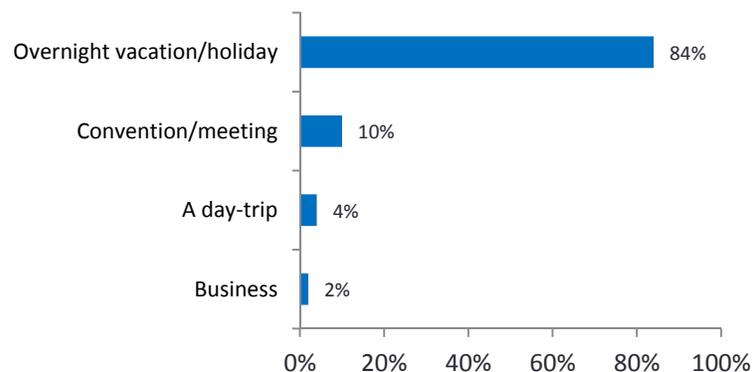
*Figure 15: ART Rider Mode of Travel*



## Length of Stay

The majority of ART riders listed overnight vacation/holiday as their primary reason for visiting The Anaheim Resort (84 percent). About 10 percent listed a convention or meeting as their primary reason for visiting, while 4 percent of riders listed day-trip and 2 percent listed business as their reasons for visiting (see Figure 16).

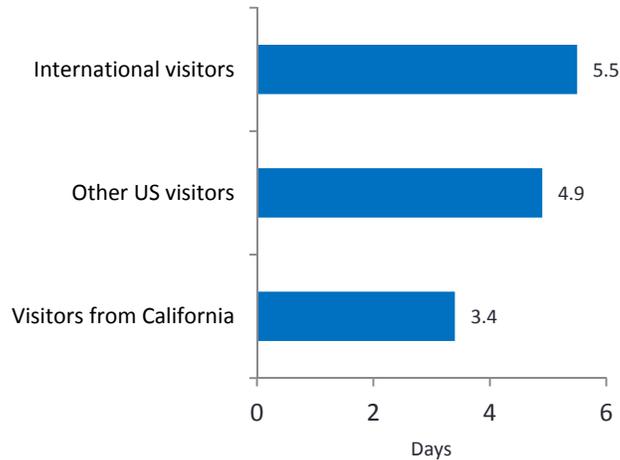
*Figure 16: ART Passenger Trip Purpose*





The average length of stay in The Anaheim Resort based on survey responses was 3.4 days for visitors from California, 4.9 days for other U.S. visitors, and 5.5 days for international visitors (see Figure 17).

*Figure 17: ART Rider Length of Stay*



*Based on survey responses, it appears the typical ART passenger is an adult traveling with children who is in Anaheim for an overnight vacation or holiday.*

*Only 5 percent of passengers traveled to The Anaheim Resort by bus, and even fewer traveled using rail (3 percent).*

*The majority of ART passengers listed overnight vacation/holiday as their primary reason for visiting The Anaheim Resort (84 percent), indicating that most demand on ART routes originates at area hotels/resorts.*



## Community Profile

In general, population and employment densities and growth forecasts are effective indicators of areas that are more likely to produce transit ridership. Data from the 2000 US Census, as well as population and employment projections provided by the Center for Demographic Research Orange County Projections (OCP 2010) and Southern California Association of Government (SCAG) were used to develop a community profile of the ART service area and surrounding areas.

Map 5 shows 2010 population and employment densities for the City of Anaheim and its surrounding areas. Map 6 illustrates the change in population and employment density between 2010 and 2035. Population and employment data corresponding to Maps 5 and 6 are shown in Figure 18. Anaheim is projected to have the largest increase in total population and employment from 2010 to 2035. Fullerton is projected to have the largest percentage increase in both population and employment. Map 5 shows the intense development that is expected to take place near the Fullerton Metrolink Station.

*Figure 18 Population and Employment Densities (2010 and 2035)*

City	Population				Employment			
	2010		2035		2010		2035	
	Total	Density (per acre)						
Anaheim	351,616	10.9	415,021	12.9	175,292	5.4	222,381	6.9
Buena Park	86,697	12.8	89,511	13.2	31,729	4.7	35,442	5.2
Fullerton	139,413	9.8	164,824	11.5	64,328	4.5	94,428	6.6
Garden Grove	176,430	15.4	186,036	16.3	46,158	4.0	47,967	4.2
Orange	140,720	9.2	154,804	10.2	90,178	5.9	107,716	7.1
Santa Ana	358,864	20.5	370,376	21.1	160,511	9.2	164,726	9.4
<b>ORANGE COUNTY TOTAL</b>	<b>3,179,768</b>	<b>6.2</b>	<b>3,573,371</b>	<b>7.0</b>	<b>1,513,042</b>	<b>3.0</b>	<b>1,845,134</b>	<b>3.6</b>

## Population

Typically small pockets of concentrated population densities are present in Anaheim, primarily in Downtown Anaheim, and the area immediately to the north. More moderate population densities characterize West Anaheim and the Hill and Canyon area.

Future growth forecasts indicate significant population growth in Downtown Anaheim and in the Platinum Triangle. Small pockets of dense residential



development are also present just south of Anaheim in Garden Grove, and just north of Anaheim around the Fullerton Metrolink station.

## Employment

Several major destinations are located within ART's service area including The Disneyland® Resort, The Shops at Anaheim GardenWalk, Angel Stadium, and Honda Center. Therefore this area is characterized primarily by high to moderate employment density. Disney® employs nearly 23,000 workers in the City of Anaheim. The Platinum Triangle and Anaheim Canyon areas also display moderate concentrations of employment.

Significant increases in employment densities are projected near Metrolink stations at Anaheim (future ARTIC), Anaheim Canyon, Fullerton, and Orange. The Platinum Triangle projects the most employment growth with over 40,000 employees projected at build-out of the commercial and office uses allowed by The Platinum Triangle Master Land Use Plan.

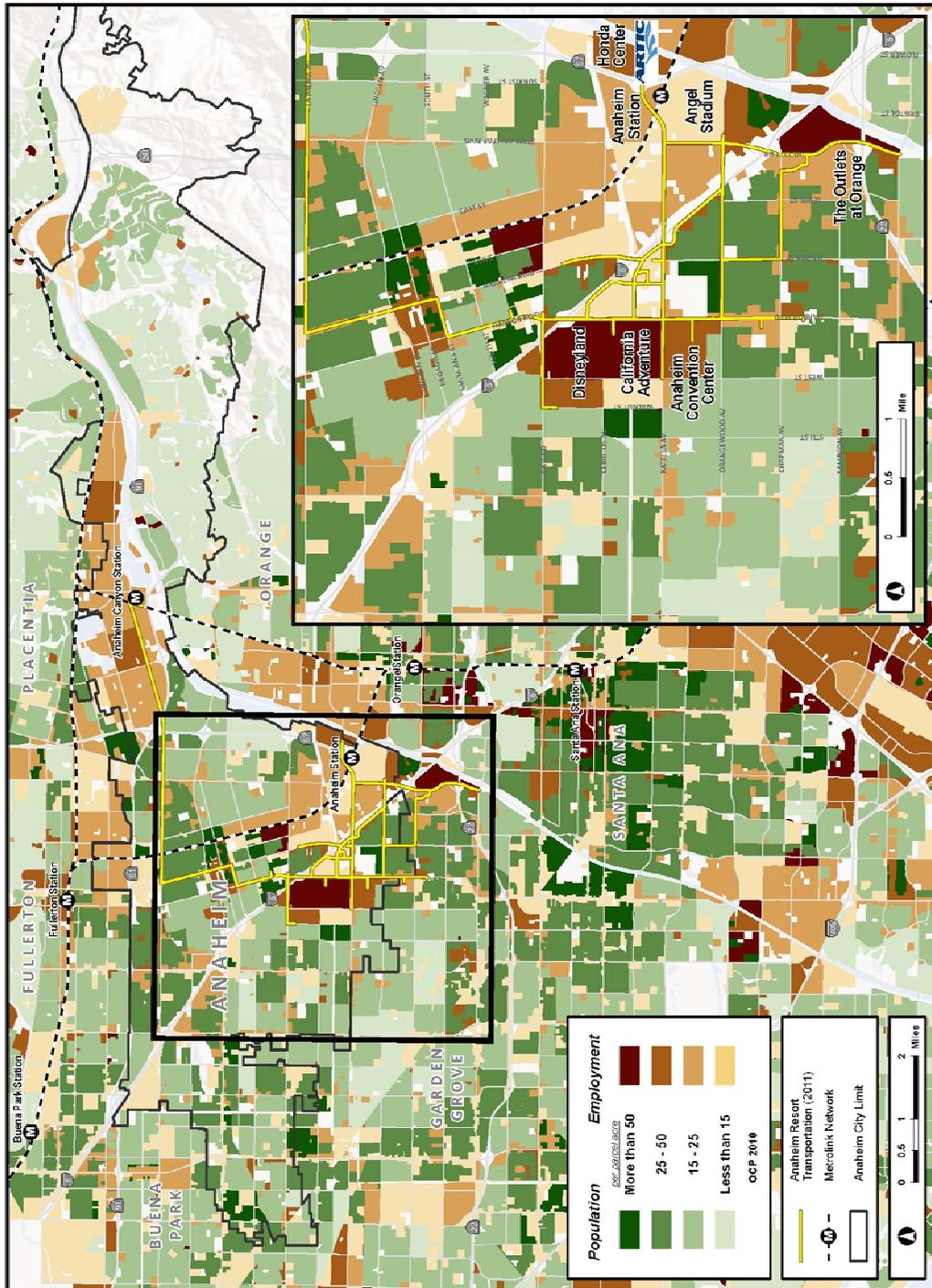
***ART serves the areas of Anaheim with the highest concentrations of employment. Significant employment and population growth is also projected within the ART service area, specifically in the Platinum Triangle.***

***The population and employment demographics highlight areas within Anaheim and the cities surrounding it where a demand for transit is likely to occur in the present and in the future. Some of the areas that show a potential demand for transit may be served more efficiently by OCTA service. There are also plans to enhance bus service along strong corridors throughout Orange County as part of OCTA's Transit System Study (TSS) including Harbor Boulevard, Katella Avenue, and State College Boulevard.***

***ART should continue to focus on serving riders traveling within The Anaheim Resort and the Platinum Triangle.***

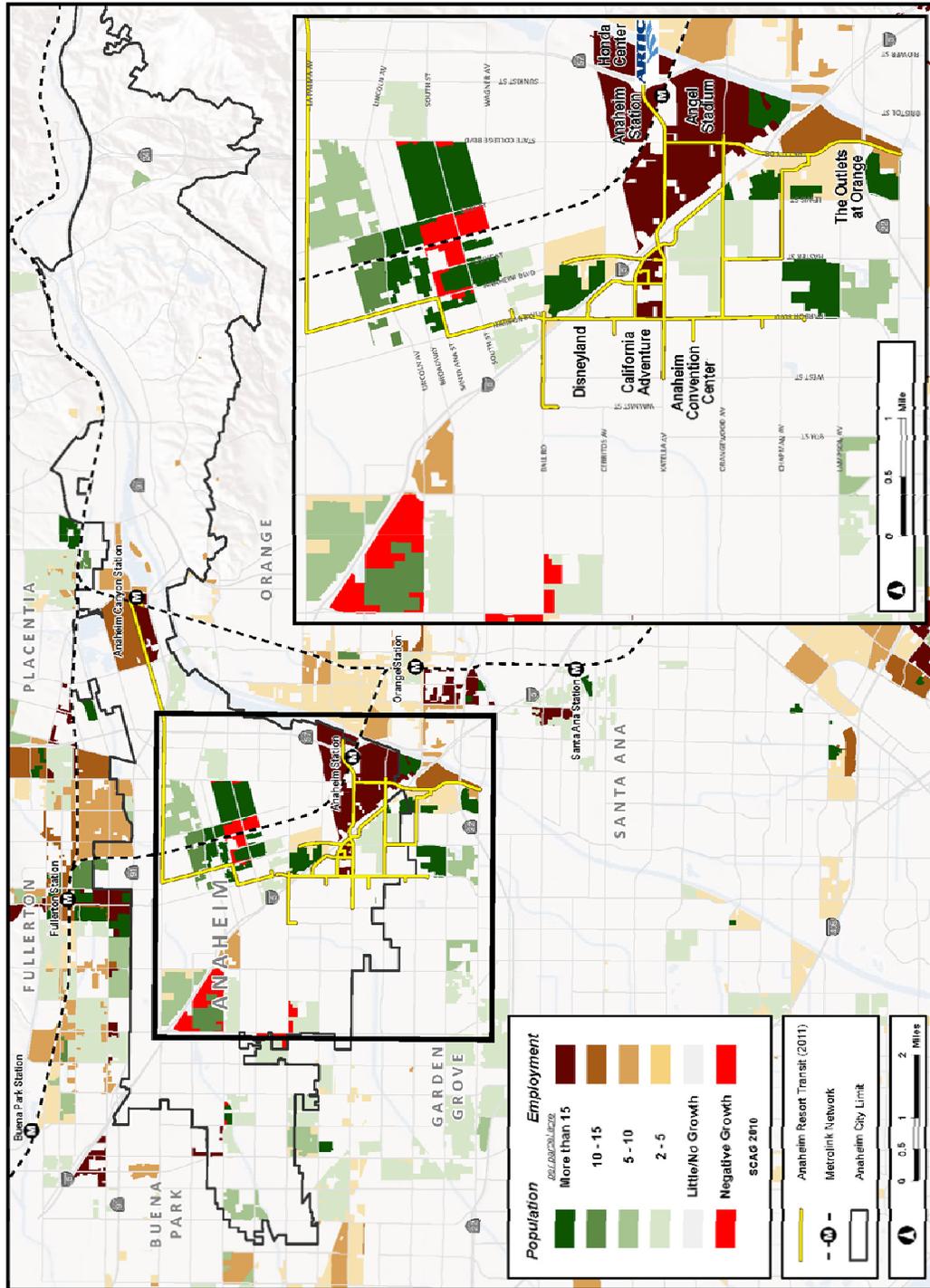


Map 5: Population and Employment Densities (OCP 2010)





Map 6: Population and Employment Change (2010-2035)





## Major Anaheim Employers

Figure 19 shows the top employers in the City of Anaheim according to the California Employment Development Department. The Disneyland® Resort employs about 13 percent of the total Anaheim workforce (with the recent expansion of California Adventure, this number has increased to 23,000). The next largest employer is Kaiser Foundation Hospital, which accounts for close to 3,700 employees, or 2 percent of all Anaheim employees.

Figure 19: Major Employers within Anaheim

Employer	Fiscal year						
	2011			2010		2009	
	Rank	Employees	% of Total City Employment	Rank	Employees	Rank	Employees
Walt Disney® Resort	1	22,710	13.1%	1	22,660	1	20,050
Kaiser Foundation Hospital	2	3,660	2.1%	2	3,660	2	3,660
Northgate Gonzalez Supermarkets	3	1,900	1.1%	3	1,900	4	2,000
Anaheim Memorial Hospital Medical Center	4	1,200	0.7%	4	1,185	5	1,185
Honda Center	5	950	0.6%	6	1,000	7	1,000
Hilton Anaheim	6	905	0.5%	7	920	8	920
Western Medical Center	7	800	0.5%				
Time Warner Cable	8	800	0.5%				
West Anaheim Medical Center	9	796	0.5%	8	774	9	774
Anaheim Marriott Hotel	10	730	0.4%	9	730		
Alstyle Apparel				10	700	10	750
Long Beach Mortgage							
Boeing North America							
Opal Concepts							
Anaheim Sports Incorporated							
Aramark at Angels Stadium of Anaheim							
SBC Communications							
Airport Bus						3	2,000
AT&T				5	1,000	6	1,000

Data Source: California Employment Development Department<sup>2</sup>

<sup>2</sup> Table provided by the City of Anaheim.



## Travel Patterns

Determining when and where people travel helps to reveal major travel movements within and outside of ART's service area. Of particular interest to ART is where employees working within The Anaheim Resort and Platinum Triangle are beginning their daily commute trips.

### **Census Journey to Work: Origins and Destinations**

The US Census Bureau and Labor Department together created a database that compiled payroll records to identify worker origins and destinations. From this database for 2009, approximately 40,500 daily work trips (home to work) were identified for The Anaheim Resort and the Platinum Triangle combined (see Figure 20). Approximately 6,100 (15 percent) of trips to The Anaheim Resort and the Platinum Triangle originated within Anaheim. Los Angeles, Garden Grove, and Santa Ana each represented about 5 percent of trip origins destined for The Anaheim Resort and the Platinum Triangle.

Only about 2,600 work trips originated within The Anaheim Resort and the Platinum Triangle. About 13 percent of these trips were destined to somewhere within Anaheim, and 9 percent to Los Angeles.



*Figure 20: Origins and Destinations for Employees working in The Anaheim Resort or Platinum Triangle*

Where do employees live?			Where do employees work?		
Place/City	Count	Percent	Place/City	Count	Percent
Anaheim	6,107	15.1%	Anaheim	349	13.3%
Los Angeles	2,141	5.3%	Los Angeles	233	8.9%
Garden Grove	2,056	5.1%	Santa Ana	200	7.6%
Santa Ana	1,865	4.6%	Irvine	129	4.9%
Orange	1,565	3.9%	Orange	119	4.5%
Fullerton	1,490	3.7%	Garden Grove	92	3.5%
Long Beach	1,342	3.3%	Costa Mesa	76	2.9%
Huntington Beach	983	2.4%	Long Beach	62	2.4%
Buena Park	844	2.1%	Huntington Beach	53	2.0%
Corona	660	1.6%	Newport Beach	51	1.9%
All Other Locations	21,420	52.9%	All Other Locations	1,254	48.1%
<b>Total All Jobs</b>	<b>40,473</b>	<b>100.0%</b>	<b>Total All Jobs</b>	<b>2,618</b>	<b>100.0%</b>



## Anaheim/Orange County Visitor and Convention Bureau Survey

Based on the Anaheim/Orange Visitor and Convention Bureau survey that was performed as part of the 2010 Annual Visitor Profile, respondents were asked to list their place of residency. Metropolitan Statistical Area (MSA) aggregated the results. Around 20 percent of respondents indicated they originated from the Los Angeles-Long Beach area, while 13 percent were from another country (see Figure 21).

Figure 21: Place of Residency for Anaheim Visitors (2010)

Top MSAs of Residency (2010 Anaheim Visitor)	All Anaheim Visitors
Los Angeles-Long Beach, CA	20.4%
International	12.7%
Riverside-San Bernardino, CA	10.7%
Not in an MSA/Unknown	9.8%
San Diego, CA	6.5%
San Francisco-Oakland-San Jose, CA	5.6%
Sacramento-Yolo, CA	2.9%
Phoenix-Mesa, AZ	2.3%
Seattle-Tacoma-Bremerton, WA	1.9%
Salt Lake City-Ogden, UT	1.9%
Bakersfield, CA	1.5%
Ventura, CA	1.5%
Las Vegas, NV-AZ	1.4%
Total	100.0%

## Future Development

The City of Anaheim has the highest projected development density among the cities within Orange County, and has many large-scale transportation, residential, office, and tourist projects underway.

### Platinum Triangle

The *Platinum Triangle Master Land Use Plan* envisions an exciting future for the area surrounding Angel Stadium of Anaheim, The City National Grove of Anaheim and Honda Center. Amidst millions of square feet of new development opportunities for office, restaurant and residential projects, is an established destination featuring high-rise lofts, two championship sports teams, an array of dining and entertainment, plus immediate access to three freeways and a major transit center.



The *Platinum Triangle Master Land Use Plan* was established in 2004 and subsequently amended in 2010. The Plan allows for up to 18,909 residential units, 4,909,682 commercial square feet, 14,340,522 office square feet and 1,500,000 institutional square feet. This includes development and entitled projects totaling 8,319 residential units, 2.3 million office square feet and 1.1 million commercial square feet.

Completed projects include:

- Stadium Lofts – 390 residential units and 10,659 commercial square feet
- Gateway Apartment Homes – 352 residential units
- Shops at Stadium Towers – 15,605 commercial square feet
- Park Viridian – 320 residential units
- 1818 Platinum Triangle– 265 residential units
- Anavia – 250 residential units
- Vivere – 92 residential units and 1,298 commercial square feet
- Avalon Anaheim Stadium – 251 residential units and 11,807 commercial square feet

Projects entitled for future development include:

- A-Town Metro – 2,681 residential units and 229,800 commercial square feet
- A-Town Stadium – 878 residential units
- Experience at Gene Autry Way – 1,208 residential units, 50,000 commercial square feet and 100,000 office square feet
- Orangewood Condominiums – 341 residential units
- Platinum Vista – 327 residential units and 9,500 commercial square feet
- Platinum Gateway – 320 residential units, 114,571 commercial square feet and 209,419 office square feet

The Anaheim Regional Transportation Intermodal Center (ARTIC) will serve as a hub for Orange County and the region, a landmark where freeways, major arterials, bus routes and Orange County's backbone rail transit system converge. The network of transit choices will continue to grow in the coming years as the number of Metrolink and Amtrak trains serving Anaheim and local and express bus routes increase. On opening day in 2014, ARTIC services will include: Metrolink, Amtrak, OCTA buses, Anaheim Resort Transportation (ART) buses, shuttles, taxis, and tour and charter buses. ARTIC will also accommodate future plans for Anaheim Rapid Connection (ARC) and high-speed trains. ARTIC's mixed-use district location also supports dense development, with up to 4 million square feet of office/commercial/institutional



development and 520 dwelling units. Construction of ARTIC commenced in September 2012 and will conclude late fall 2014.

### The Anaheim Resort

The Anaheim Resort includes Disneyland®, the Anaheim Convention Center, The Shops at Anaheim GardenWalk, and a significant number of lodging establishments. Future developments in the area include:

- ***The Shops at Anaheim GardenWalk*** includes approximately 439,600 square feet of commercial square feet and 1,266 hotel rooms (including up to 400 timeshare rooms). The commercial areas have been developed and the hotels are pending market conditions.
- ***Springhill Suites Marriott*** on South Walnut is a 5.59-acre, 120-unit hotel that will be added to an existing Holiday Inn. Construction schedule is pending market conditions.
- ***The Anaheim Resort Hotel and Spa*** on South Harbor Blvd at Katella Avenue is a 252-room, 9-story luxury hotel with high-end restaurant and retail space. The project has been approved; however, construction is pending market conditions.
- ***The Anaheim Convention Center Grand Plaza Project*** will consist of a pedestrian plaza with up to 100,000 square feet of outdoor programmable space for the Anaheim Convention Center. The plaza will feature landscaping, walkways, water features, street furniture, and lighting to support programs and events. Several vehicular circulation improvements will be completed as part of the project, modifying the entry and exit areas to the Hilton Anaheim and Anaheim Marriot hotels, which are served by ART. Construction of this project has commenced with expected completion by January 2013.

### The Canyon

Major planned developments in the Anaheim Canyon area include:

- ***The Kaiser Permanente Hospital Campus*** at 3400 East La Palma Avenue is a planned hospital campus to be constructed in three phases. Phase 1, which opened in 2009, includes 118,500 square feet of medical office space. Phase 2 consists of a 7-story parking structure, central utility plant, 260-bed hospital, and an 180,000 square foot Professional Office Building occupied in September 2012. Phase 3 consists of two additional medical office buildings, a 100-bed expansion of the hospital, and a 6-story parking structure with completion expected by 2020.
- ***The Crossing*** on East La Palma Avenue is a TOD consisting of 312 condo units and 39 live/work units.



- **Pacificcenter** is located near the Anaheim Metrolink Canyon Station on the corner of Tustin Avenue and East La Palma Avenue. This development is a mixed-use project that includes plans to intensify the existing office/retail center to complement the expansion of the train station.
- **Mountain Park** will be developed in Gypsum Canyon, south of SR-91, east and west of SR-241. The development will result in 2,500 new homes, a fire station, an elementary school, and various community facilities.

### Market Assessment Key Findings

Key findings from The Anaheim Resort Transportation Market Assessment include:

- **The Anaheim Resort is the focal point of the service area.** Defined primarily by tourist destinations along Harbor Avenue and Katella Avenue, The Anaheim Resort is the key market area for ART service. Major destinations such as The Disneyland® Resort, the Anaheim Convention Center, and The Shop at Anaheim GardenWalk are located within The Anaheim Resort. The majority of Anaheim hotels are also located within The Anaheim Resort, accommodating overnight Anaheim and Orange County visitors.
- **Future growth within the existing ART service area will provide significant potential for demand.** Major development is projected for the City of Anaheim in The Anaheim Resort and the Platinum Triangle. Implementation of the ARC will provide a fast and direct connection between The Anaheim Resort and the Platinum Triangle. The future ARTIC will also compliment on-going plans for development within the City of Anaheim, encouraging more transit focused growth.
- **Currently, 9 percent of Anaheim visitors indicated they used bus or shuttle service as their primary mode of transportation while in Anaheim, and an additional 9 percent indicated walking as their primary mode (Anaheim Orange County Visitor & Convention Bureau 2010 Visitor Profile).** There is a potential to increase overall ridership on the ART system by capturing visitors and employees who currently use vehicles to travel within The Anaheim Resort and the Platinum Triangle. Shifting short visitor and employee trips within The Anaheim Resort and the Platinum Triangle from private vehicles to transit will further support the City of Anaheim's economic development and environmental goals.
- **Three percent of ART riders currently access the system via rail (ART On-Board Survey, 2011).** This percentage is expected to increase with future High Speed Rail (HSR) and Metrolink Service Expansion Program (MSEP).
- **The majority of visitors to Anaheim come from Southern California and accessed The Anaheim Resort via private vehicle on a day trip.** Although these visitors have access to a vehicle throughout the day, there is potential



for this market segment to use transit to travel within the service area. For instance, these visitors can use ART to connect from a sporting event to Disneyland. ***Anaheim is the most popular city for accommodations among both Anaheim visitors and Orange County visitors (Anaheim Orange County Visitor & Convention Bureau 2010 Visitor Profile).***

- ***In general multi-day, overnight visitors spend significantly more than day visitors on a typical trip to Anaheim.*** The average day visitor to Anaheim spends approximately \$64 per day while hotel guests ***spend approximately \$151 per day and stay in Anaheim an average of 3.7 nights for a total of \$553 spent per visitor over the length of a stay.***
- ***The Anaheim Resort and the Platinum Triangle generate a significant number of work trips.*** There are nearly 40,000 daily work trips to The Anaheim Resort and the Platinum Triangle. About 15 percent of these trips originate within Anaheim. Disneyland® Resort alone employs nearly 23,000 employees, accounting for 13 percent of the workforce in the City of Anaheim.



## Service Evaluation

### Purpose

The *Service Evaluation* section of the Existing Conditions task is another key component of the *ART Restructuring Study*. The analysis is intended to identify service implementation strategies that will match ridership demand with the appropriate levels of service and resource investment. The analysis focused on the ART Network in operation at the time the study was initiated (August 2011). The Service Evaluation includes key findings in four specific sections:

1. **ART Service Overview** describes the existing ART system including frequency, span of service, fare structure, fleet, existing facility, operating cost, and revenue generation.
2. **ART Ridership** details the current use of the system at the network, route, and stop level.
3. **Service Performance** evaluates productivity and financial effectiveness of the service at the route level.
4. **Customer Experience** reviews how ART manages the overall “guest experience.”

### Anaheim Resort Transportation Service Overview

ART provides service within the City of Anaheim and currently contracts its operations to an external transit provider who operates the 18 fixed-routes and the Anaheim Canyon Metrolink (ACM) Connector.

The following table shows annual boardings, revenue hours, and revenue miles for FY2010 and FY2011. Since Route 17 only operated for a portion of FY2010, reported figures for FY 2010 represent partial ART system metrics compared to the information presented for FY2011. Route 18 and Route 19 were also not operating at the time the data was collected. Route 2, 15, and 16 were also restructured after this analysis was completed.

*Operating Route 17 significantly increased the complexity of ART’s daily operations, requiring additional personnel and capital resources due to the increased ridership.*



Figure 22: ART Service Statistics Summary

	FY 2010	FY 2011	% Change
<b>Ridership</b>			
ART Base Routes 1-16	3,043,680	2,471,306	-19%
Route 17	1,072,969	5,169,884	382%
ACM	14,379	14,198	-1%
<b>Total</b>	<b>4,131,028</b>	<b>7,655,388</b>	<b>85%</b>
<b>Revenue Hours</b>			
ART Base Routes 1-16	83,736	87,754	5%
Route 17	27,065 <sup>3</sup>	83,547	209%
ACM	1,134	1,112	-2%
<b>Total</b>	<b>111,935</b>	<b>172,412</b>	<b>54%</b>
<b>Revenue Miles</b>			
ART Base Routes 1-16	674,096	621,089	-8%
Route 17	158,286	384,724	143%
ACM	12,356	12,653	2%
<b>Total</b>	<b>844,738</b>	<b>1,018,466</b>	<b>21%</b>

Data Source: ART TransTrack Monthly Agency Summarized Database

Harbor Boulevard is the primary corridor of the network containing the Disneyland® Resort Main Transportation Center – East Esplanade, the Convention Center campus, and a significant number of resort focused lodging establishments that accommodate overnight visitors. ART focuses on providing connectivity primarily between resort hotels, parking locations, and transportation centers to key attractions. Therefore, the ART system is structured more as individual routes connecting specific origins and destinations rather than an overall street network of routes. This approach focuses service around the goal of providing riders or “guests” a convenient, cost effective and reliable experience in Anaheim.

### Frequency and Span of Service

The majority of ART routes operate at approximately 20-minute headways, with Routes 15, 16, and the ACM rail feeder service being the exceptions. To maintain 20-minute frequencies and mitigate capacity issues, floater buses or “relief vehicles” are dispatched, when necessary, typically around park opening and closing times.

<sup>3</sup> Route 17 began operations in March 2010



The span of the routes varies daily based on the operating hours of activity centers. Operating hours generally span a longer period during peak seasons and on weekends during the off-peak season. Longer system operating hours also occur during holidays and special events throughout the year.

### Fare Structure

ART customers can purchase passes from the majority of lodging establishments, online, or at Ticket Vending Machines (TVMs) located throughout the service area. ART day passes cannot be purchased on the bus, however one-way cash fares can be purchased for exact change. The passes are valid on all ART routes for the duration of time specified on the pass. Additionally, 15- and 30-day passes were introduced in April 2012 to encourage commuter ridership. Figure 23 lists the ART fares.

*Figure 23: ART Fares*

Fare Type	Adult	Child (3-9 years)	Seniors and Disabled
Cash Fare	\$ 3.00	\$ 1.00	\$ 1.00
1-Day Pass	\$ 4.00	\$ 1.00	\$ 2.00
3-Day Pass	\$ 10.00	\$ 2.00	\$ 5.00
5-day Pass	\$ 16.00	\$ 4.00	\$ 8.00

### ART Fleet

ART currently has 62 vehicles in use. Figure 24 shows the number of each type of vehicle in the ART fleet along with its respective length and capacity. The average fleet age of ART's 62 vehicles is 9.5 years.

Thirty-five NABI LNG 40-foot buses, currently on lease from OCTA, comprise more than half of the ART fleet. Twenty-three of the leased NABI buses are twelve years old and the other twelve are eleven years old. Twenty-five of these vehicles are assigned to the Route 17. The remaining ten NABI buses are used for base ART service.

The fleet also consists of eight 32-foot El Dorado Kodiaks, nine 32-foot Startcraft GM 550s, five 22-foot E-buses, four 22-foot AeroStar New Flyers (retired), and one 40-foot New Flyer (training bus).



Figure 24: ART Fleet

Model	Vehicle Length (ft.)	Seated Capacity	Standing Capacity	Count
El Dorado Kodiak	35	29	15	8
E-Bus	22	19	10	5
New Flyer (training)	40	40	20	1
AeroStar New Flyer (retired)	22	19	10	4
NABI LNG	40	38	25	35
Startcraft GM 550	32	28	14	9

### ART Facility and Maintenance

The current ART administrative office and operating facility is located at 1280 South Anaheim Boulevard. The contracted transit provider operates out of this facility, which has a capacity of approximately 35 vehicles. The remaining vehicles including the OCTA leased buses are stored and maintained at OCTA's Garden Grove Bus Base facility on South Harbor Boulevard.

The existing ART facility is leased from the City of Anaheim and was recently slated for redevelopment; therefore ART will have to relocate its administrative office and operating facility in the near future. ART is evaluating alternatives for temporary and permanent facilities.



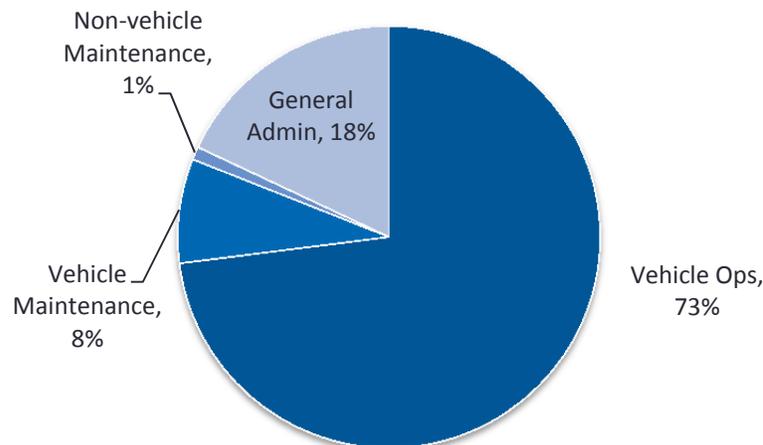
## Operating Cost and Revenue Generation

This section breaks down ART's fully loaded operating cost and generated revenue for FY2011.

The total operating cost in FY2011 was \$10.8 Million with 73 percent allocated to vehicle operations, 8 percent to vehicle maintenance, 1 percent to non-vehicle maintenance, and just 18 percent to general administration (see Figure 25).

Figure 25: ART Operating Cost (FY 2011)

FY2011 Operating Cost	
<b>Total</b>	<b>\$10.8 Million</b>
Vehicle Ops	73%
Vehicle Maintenance	8%
Non-vehicle Maintenance	1%
General Admin	18%

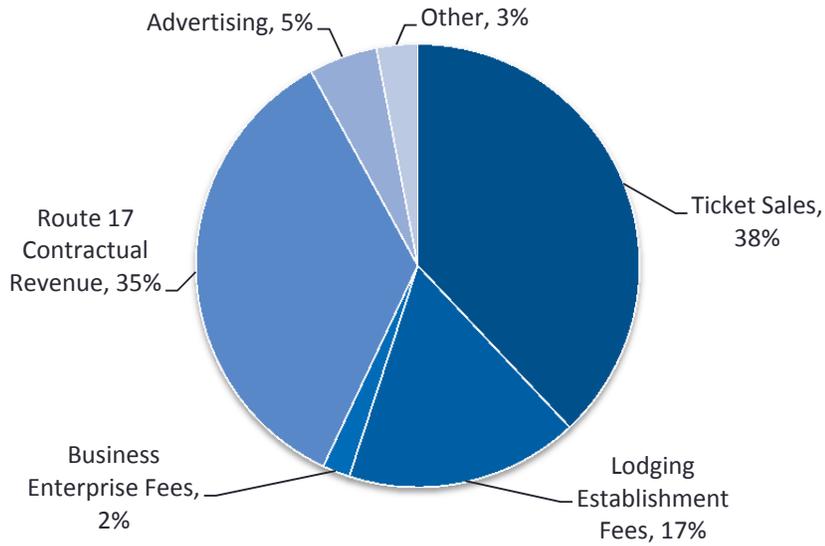


Revenue generated in FY2011 totaled \$11.6 Million. Overall, ticket sales generated 38 percent of total revenue. This percentage is not representative of the system farebox recovery ratio since Route 17 does not generate fare revenues, but is funded through a contractual relationship with Disneyland® Resort, accounting for an additional 35 percent of ART generated revenue. Lodging establishments served by ART contribute approximately \$0.48 per room per service day, accounting for 17 percent of generated revenue. Fees established and approved by the ATN Board of Directors through a contractual relationship with business enterprises located in The Anaheim Resort account for 2 percent, advertising accounts for 5 percent, and other sources generate an additional 3 percent of revenue (see Figure 26).



Figure 26: ART Revenue Generated (FY 2011)

FY2011 Revenue Generated	
<b>Total</b>	<b>\$11.6 Million</b>
Ticket Sales	38%
Lodging Establishment Fees	17%
Business Enterprise Fees	2%
Route 17 Contractual Revenue	35%
Advertising	5%
Other	3%





## Ridership

A key element to understanding how customers presently use the ART system is evaluating the distribution of ridership across the network by route and geography.

Data was collected from GFI GenFare validating farebox system, providing individual records of each transaction that occurred on ART vehicles throughout FY2010 and FY2011. Operators manually collect ridership data for Route 17 and the Anaheim Canyon Metrolink (ACM) rail feeder service.

*ART should focus on collecting and processing data more efficiently through APCs (Automatic Passenger Counters) to allow for a more thorough and detailed analysis of ridership activity in the future. More organized data collection will also allow for more efficient and effective management of route planning and daily operations.*

## System Ridership by Stop

The ART ridership data for FY2011 indicates a total of approximately 5.3 million weekday boardings, 1.2 million Saturday boardings, and 1.1 million Sunday boardings.

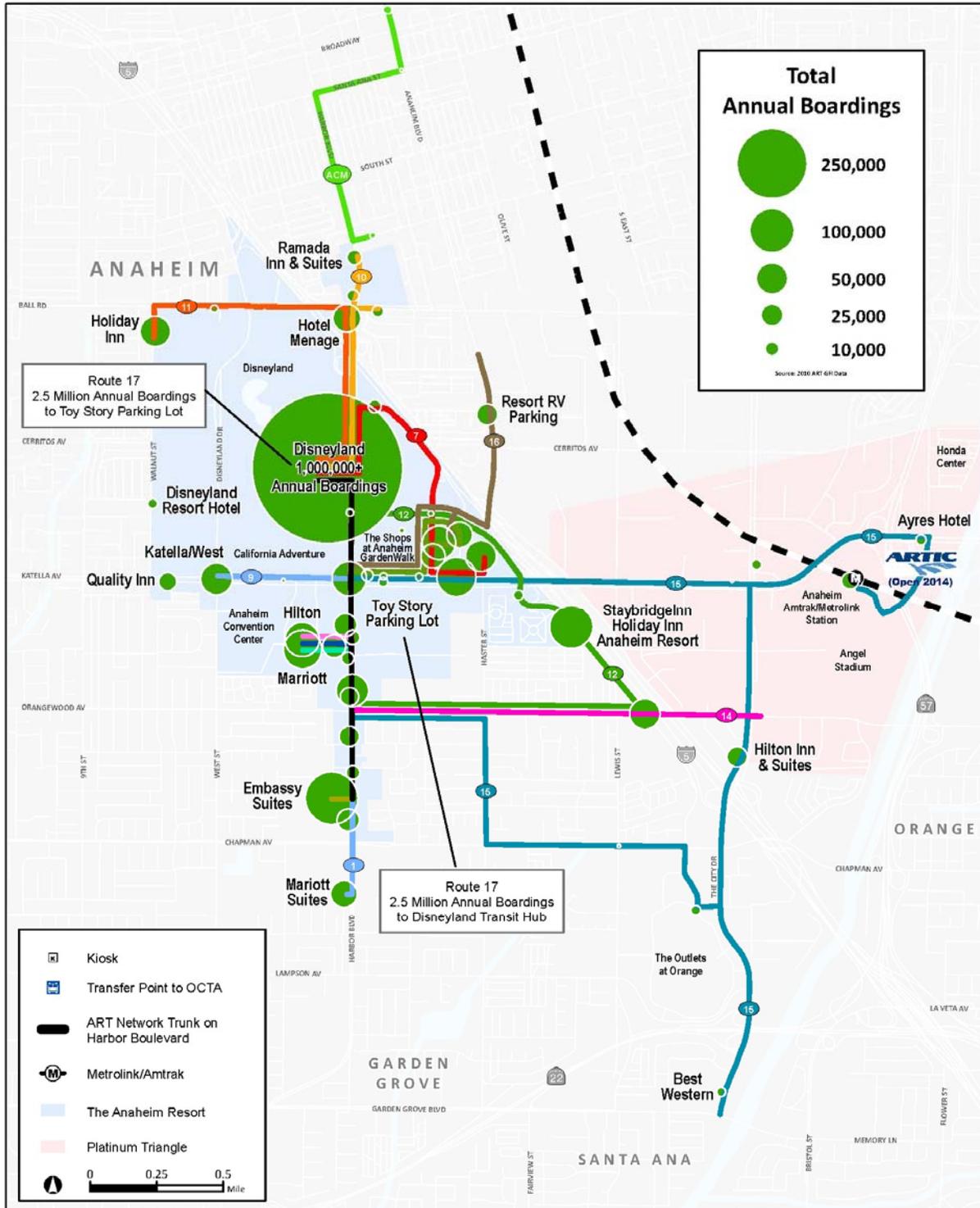
Map 7 depicts annual ART boardings by individual stop. This map provides an overall ridership profile for the ART system. The green dots generally represent overnight visitors with accommodations in-and-around The Anaheim Resort, representing nearly 2.5 million annual boardings. Day visitors are primarily represented by Route 17 ridership since these visitors are most likely to drive, park at a local parking facility, and utilize Route 17 for their final connection. Route 17 accounted for approximately 5 million boardings in FY2011 (2.5 million in each direction).

Map 7 also shows that the Disneyland® Resort is clearly the nucleus of the transportation system. Hotels along Harbor Boulevard and Katella Avenue, collectively, act as major trip generators destined for the Disneyland® Resort's East Esplanade. The local parking facilities are the primary origin for day visitors using the ART system.

Minor ridership is present throughout the Platinum Triangle where Angels Stadium, Honda Center, and the Anaheim Metrolink/Amtrak Station are located. There are also a small number of boardings south of The Anaheim Resort, along the Route 15 alignment in Garden Grove.



Map 7: ART System Boardings





### **Demand Variability**

There is a strong demand for transit on the weekend due to the local market being oriented towards leisure and convention travel, which is not often the case with traditional transit systems. Data also indicates high variability in demand based on the type of day and time of year.

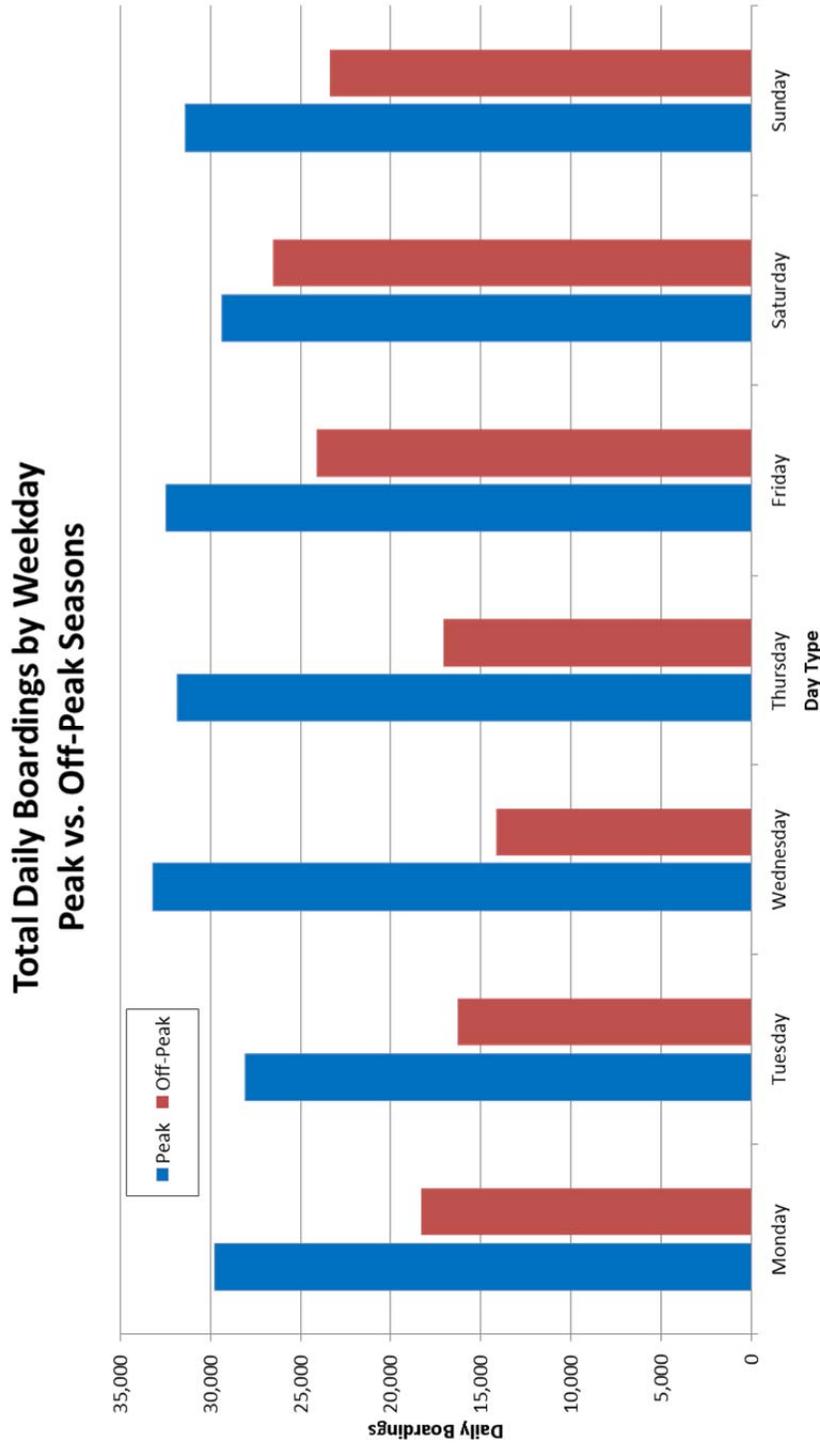
Ridership data from two months during the 2010 peak (July and August) and off-peak (September and October) seasons were analyzed. Figure 27 shows the total daily boardings by day type, comparing the peak and off-peak. During the peak season, there is much less variability between weekday and weekend boardings, showing that demand remains high throughout the week. However, during the off-peak season, it is clear that demand drops from Monday to Thursday and significantly increases on Friday, Saturday, and Sunday.

ART also faces additional fluctuations in demand during special events and holidays. Major holidays will typically extend the weekend peak by one or two days, with increases in the number of both daytime and overnight visitors. Special events such as major conventions, sports events, and concerts also increase demand throughout the ART service area.

***Demand within the ART service area varies widely based on the type of day, time of year, occurrence of special events, and theme park hours. ART should continue to match the service it supplies with anticipated demand.***



Figure 27: Demand Variability Example





## Ridership by Route

Figure 28 shows annual boardings by route for the ART system.

Route 17, a connecting service between local parking facilities and Disneyland® Resort's East Esplanade, accounts for nearly 5.2 million boardings and serves the majority of guests who visit Disneyland® Resort. The remaining routes primarily serve lodging establishments throughout The Anaheim Resort and the Platinum Triangle.

Route 2, which served Embassy Suites, the Anaheim Convention Center, The Shop at Anaheim GardenWalk and Disneyland® Resort, displays the second-most weekday boardings and has an annual total of over 250,000. However, in February 2012, Route 2 stopped serving Embassy Suites because Embassy Suites began operating their own shuttle that directly served The Disneyland® Resort.

Routes 7 and 8 serve the group of hotels just east of The Shops at Anaheim GardenWalk and each have approximately 220,000 annual boardings.

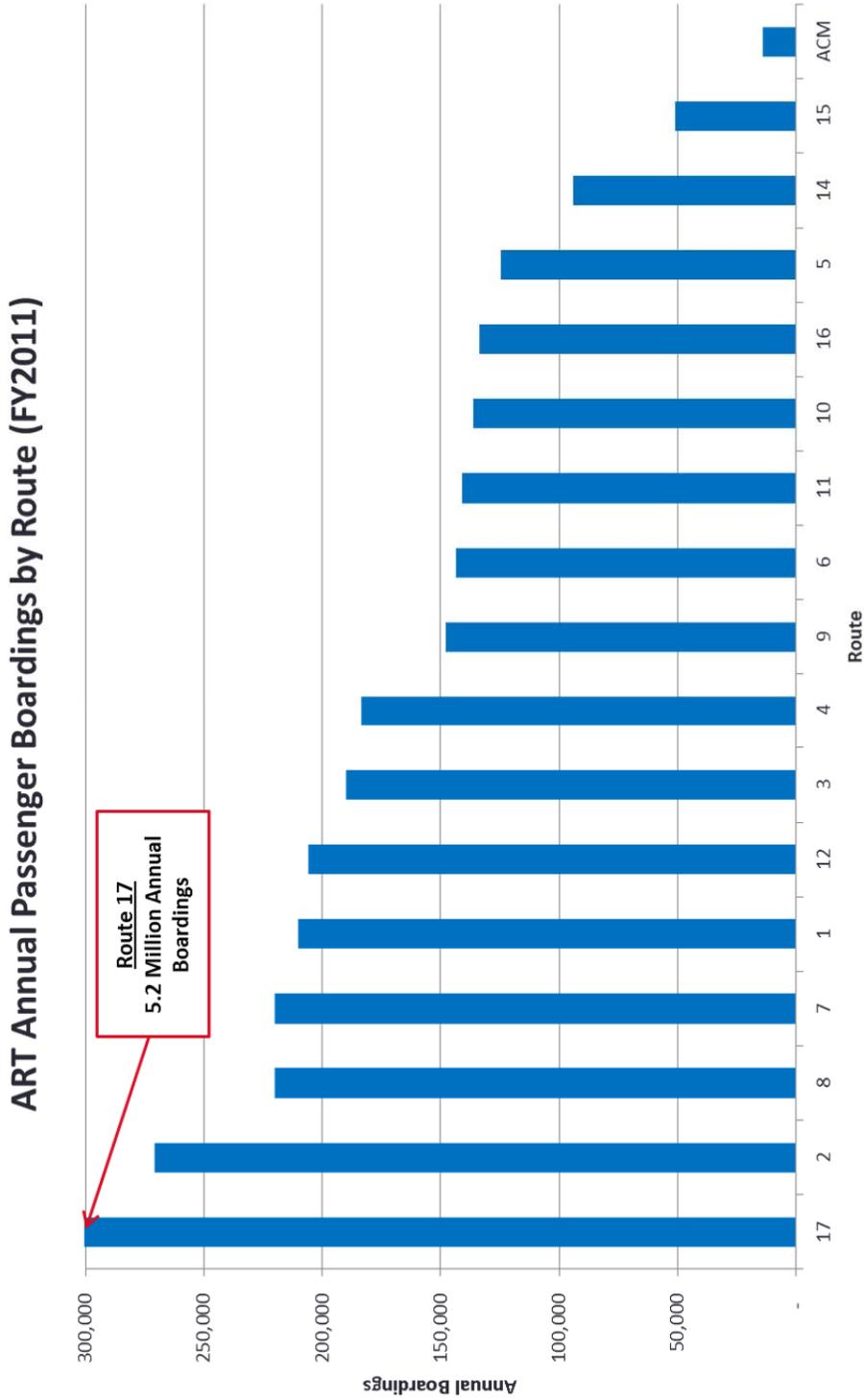
Route 1 provides service to the Marriot Suites in Garden Grove, the Anaheim Convention Center, The Shops at Anaheim GardenWalk, and Disneyland® Resort along Harbor Boulevard. This route accounts for approximately 210,000 annual boardings. Route 12 generates approximately 205,000 annual boardings and serves the Staybridge and Holiday Inn Anaheim Resort on Manchester, the Anaheim Convention Center, The Shops at Anaheim GardenWalk, and Disneyland® Resort.

Route 3 serving South Harbor Boulevard and Route 4 serving Convention Way are the other two routes generating over 150,000 boardings annually.

The remaining routes generally serve more dispersed, lower demand hotels, and have a fewer annual boardings. Route 14, Route 15, and the Anaheim Canyon Metrolink (ACM) rail feeder service have the smallest number of total annual boardings.



Figure 28: ART Annual Passenger Boardings by Route





## Service Performance

Service performance for the ART system is measured by productivity and financial effectiveness.

Productivity measures route level service effectiveness by using the following metric:

- **Passenger boardings per revenue vehicle hour:** The number of unlinked passenger boardings (ridership) generated per revenue hour of service operated.
- **Financial effectiveness** compares passenger farebox revenue (operating revenue) with operating cost using the following metrics:
  - Farebox recovery ratio: Ratio of fare revenue to operating costs. Subsidized services have farebox recovery ratios below 100 percent, while cost-effective services are over 100 percent.
  - Net subsidy per passenger boarding: Measures the average passenger fare less the operating cost per unlinked passenger boarding. This metric indicates the amount of subsidy necessary to support each passenger trip.

### Passenger Boardings per Vehicle Revenue Hour

Figure 29 shows passenger boardings per vehicle revenue hour for each ART route. Route 17 is by far the most productive route that ART operates. High passenger loads, particularly in the peaks, along with the short distance traveled, results in an average productivity of over 60 boardings per revenue hour.

Route 2<sup>4</sup> was the most productive route serving guests with hotel accommodations in the ART service area, averaging 48 boardings per revenue hour.

Seven routes average between 30 and 40 boardings per revenue hour, 5 routes average between 20 and 30 boardings per revenue hour, and only 3 routes average below 20. In general, the less productive ART routes are those serving hotels and destinations that are more dispersed and located further away from the core resort area.

Route 15<sup>5</sup>, the least productive route, generated an average of 9 boardings per revenue hour. The route served the Anaheim Metrolink/Amtrak Station, the Outlets

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<sup>4</sup> In April 2012, Route 2 was eliminated because Embassy Suites began operating their own shuttle that directly served The Disneyland® Resort.



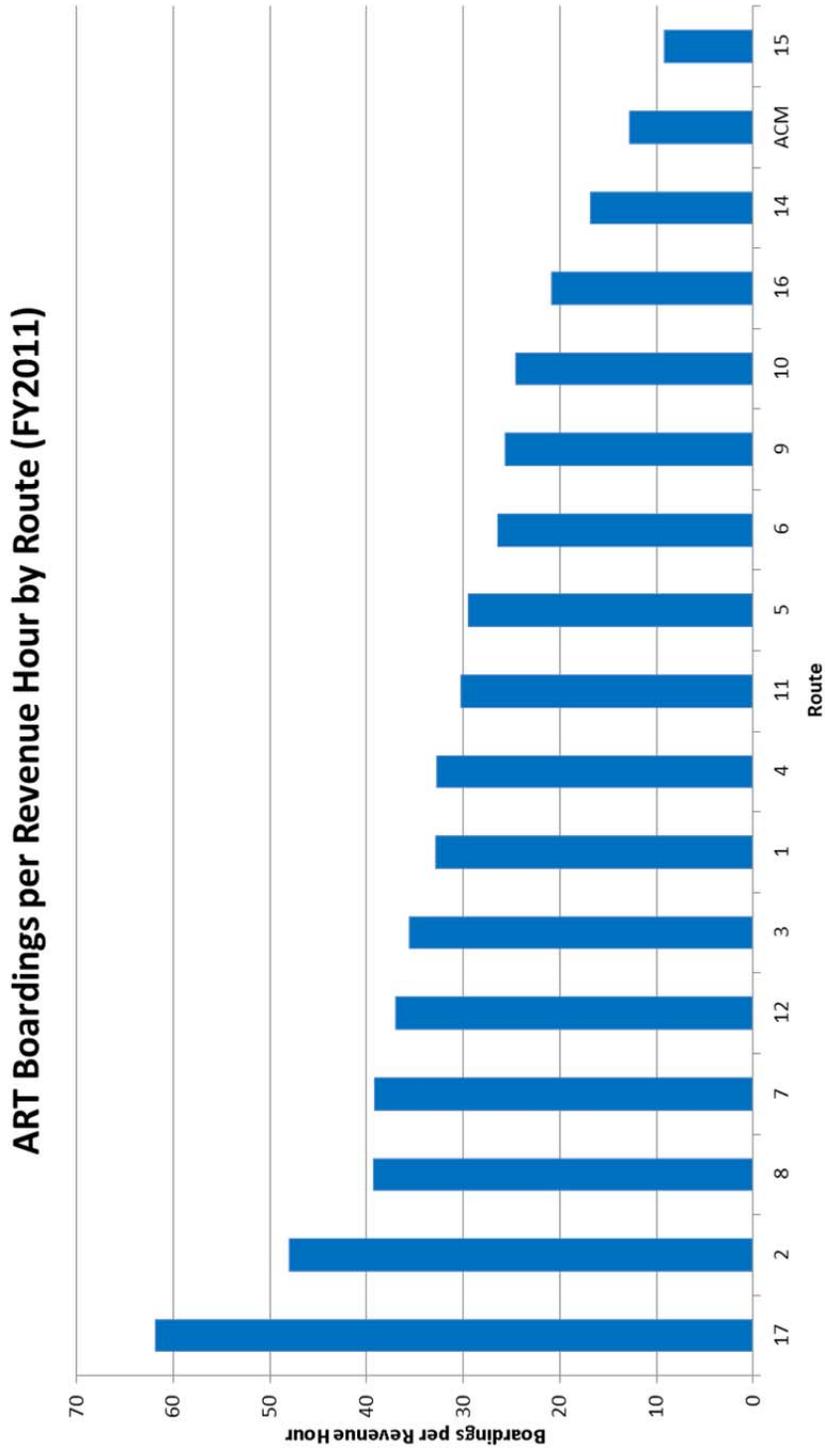
at Orange, the Crystal Cathedral, the Anaheim Convention Center, The Shops at Anaheim GardenWalk, and Disneyland® Resort. Although this route served a number of key destinations, it did not generate many boardings. Route 15's low productivity was a result of operating at a 60-minute frequency and traveling a significant distance between each stop.

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<sup>5</sup> Route 15 was streamlined between The Anaheim Resort and the Platinum Triangle via Katella Avenue in an effort to build service awareness and appeal to the train patrons. The southern portion of Route 15 was re-named Route 16. Route 16, which originally served the Anaheim Resort RV Park and Motel 6, was re-named Route 2.



Figure 29: ART Passenger Boardings per Revenue Hour





## Financial Effectiveness

Productivity measures are usually good indicators of a route's financial effectiveness. Routes with strong productivity tend to have higher farebox recovery ratios while the opposite is true for routes with weak productivity. Services with farebox recovery ratios above 100 percent represent financially sustainable transit services, while those below 100 percent are partially subsidized services (see Figure 30).

Net revenue per passenger boarding is also an effective way to evaluate the financial performance of service. Net revenue per passenger boarding measures the additional costs, beyond fare revenue collected, that ART must contribute to cover operating costs. Low net revenue per passenger boarding generally equates with a low farebox recovery ratio (see Figure 29).

Of the ART routes that collect passenger fares, only three routes had farebox recovery ratios below 100 percent (Routes 14, 15, and 16). Route 16 recovered 85 percent of its operating cost, while Routes 14 and 15 recovered 64 and 34 percent of their operating costs, respectively.

Route 8, Route 2, and Route 7 display farebox recovery ratios over 150 percent. These three routes each collect more than one and a half times as much in fare revenues than their respective operating costs.

Route 17's service is fully funded by an assessment fee.



Figure 30: Farebox Recovery Ratio by Route

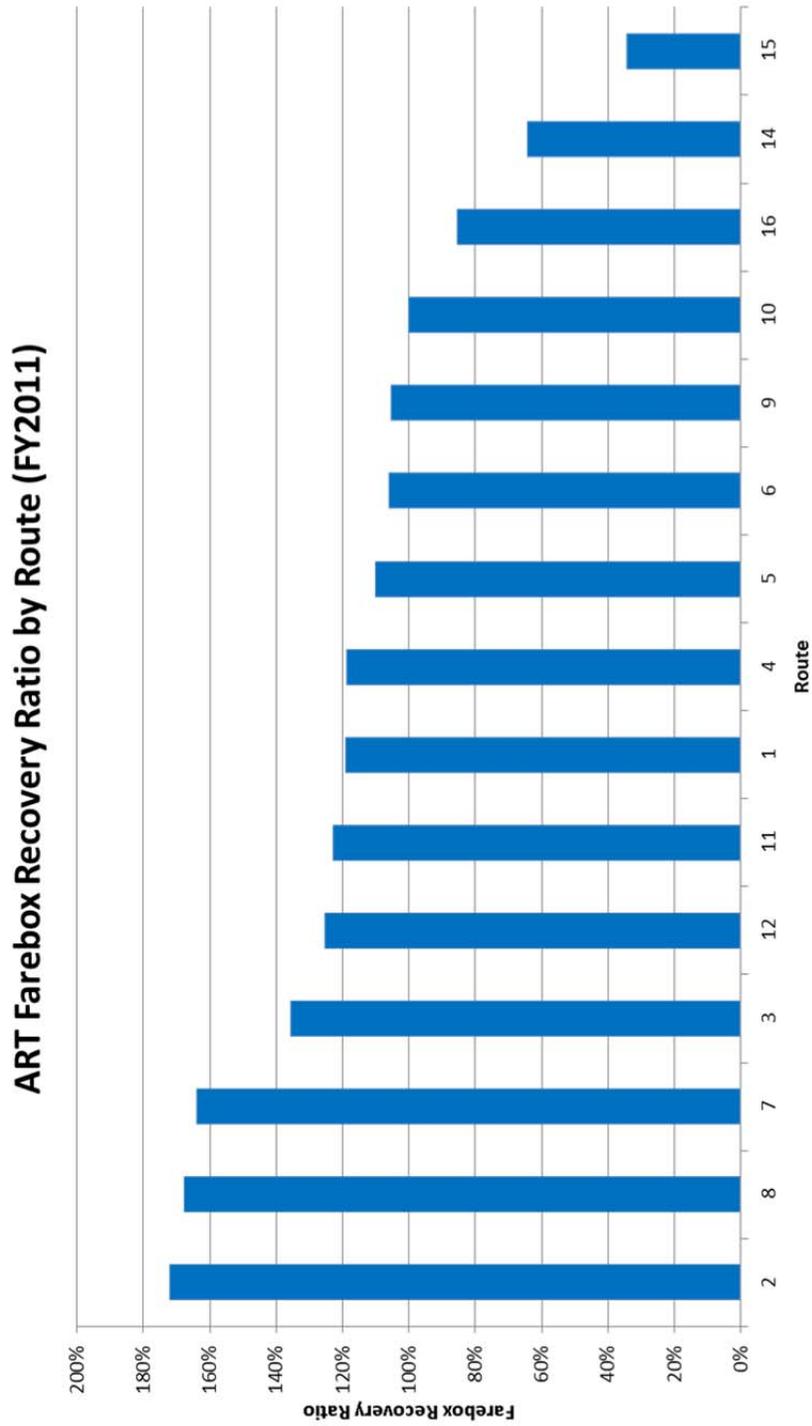
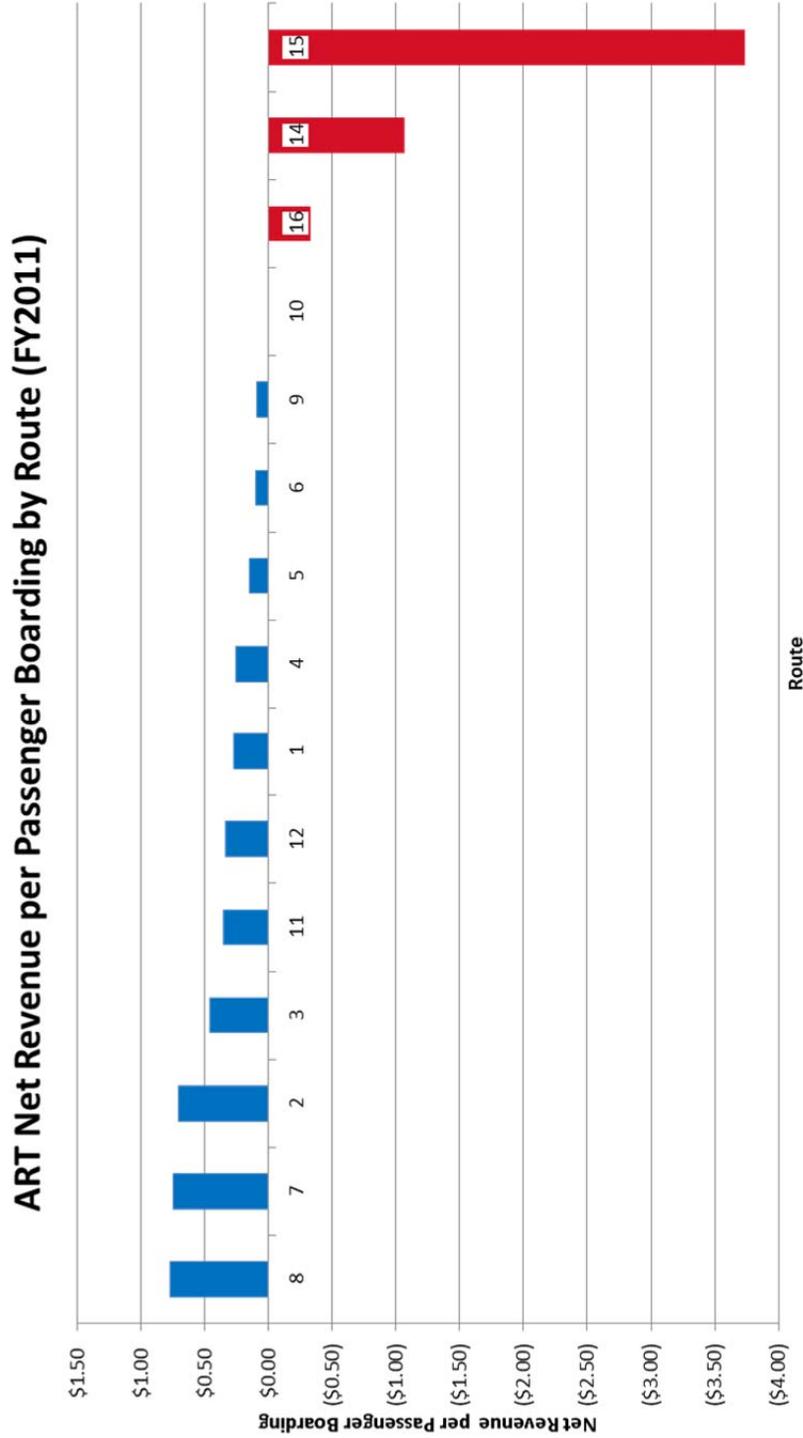




Figure 31: Net Revenue per Passenger Boarding by Route





### **Customer Experience**

ART serves an area driven by tourism and guest-focused attractions and accommodations, making the transit system a part of the overall guest experience for riders utilizing the service as part of their stay in Anaheim. Enhancing this guest experience will not only help retain current ART riders during their future visits to Anaheim, but it will also encourage new riders to begin using the system.

Easy to understand and readily available system information is the beginning to providing a customer with an overall quality experience while using ART. Currently, ART provides adequate information on routes, stop locations, fare pricing, daily service spans, and frequencies both online and at many of the hotels and participating properties throughout the service area.

With the exception of a few routes that operate on a published schedule, ART routes are advertised to arrive approximately every twenty minutes. ART monitors vehicle loads and running times and dispatches relief vehicles to assist with overcrowding and travel times.



### Service Evaluation Key Findings

- **ART currently provides service to and from lodging establishments, parking facilities, and transportation hubs destined for major resort/entertainment activities within the service area.** The majority of ART routes operate on an approximately 20-minute headway frequency throughout the day. Service spans vary daily based on park hours and special events.
- **Ridership is concentrated in The Anaheim Resort.** Disneyland® Resort is the main destination of the network, while Harbor Boulevard and Katella Avenue act as the main corridors where hotels, parking and other attractions are located.
- **The majority of ART routes generate revenues higher than the break even cost point.** Revenue is generated primarily through ticket sales, advertising, and assessment fees from participating properties. Only three routes (14, 15, and 16) generated net revenue per passenger boarding below the break even cost point.
- **Less productive routes are those that travel further away from The Anaheim Resort (i.e. 14, 15, and 16).** These routes serve low demand hotels and attractions, while traveling longer distances to reach these stops, resulting in lower productivity and financial effectiveness. This dynamic is important as ART serves events at the outer lying venues (Angels Stadium, Honda Center). While this Study was being conducted, ART re-aligned two routes (Route 14 & 15) to enhance service delivery to the Platinum Triangle. Post April 2012, Route 15 provides direct connections from the Platinum Triangle and Anaheim Amtrak/Metrolink train station to The Anaheim Resort. ART should continue to gauge demand in the Platinum Triangle. Additional service enhancements to meet all arriving trains at the train station depend on the availability of additional financial resources and future opportunities for service streamlining between the ATN, OCTA and the City.
- **Demand and travel patterns in the ART service area vary daily based on season, day type, park hours, and special events.** Highest demand occurs in the summer time (Memorial Day to Labor Day), winter and spring break, and on weekends.
- **Day visitors generally utilize ART service via Route 17 between parking facilities and Disneyland® Resort, while overnight visitors utilize the remaining routes that travel between hotels and Disneyland®.** The addition of Route 17 has provided another niche market for the ART and one that can be replicated or expanded as development in the area takes place.
- **ART should focus on collecting data more efficiently in order to manage daily operations effectively.** This will become more important as Disney®, The Anaheim Resort, and the Platinum Triangle continue to develop.
- **The system has grown incrementally and has reached a point where issues such as a permanent operating facility, a fleet replacement schedule, and additional investment in technologies should be addressed.**



- *OCTA currently provides daily service throughout Orange County with enhanced service planned along key corridors as part of the OCTA TSS. ART has an opportunity to coordinate its development efforts with OCTA.*
- *ART should continue to focus on ensuring a high quality customer experience: driver courtesy, friendliness, and fast, appropriate responses to customer questions and concerns.*



## Section 4 – Outreach Activities

Public and stakeholder outreach activities were conducted throughout the study based on a public involvement plan prepared for ART by TMD during the early stages of the study. The public involvement plan was a collaborative process that engaged key stakeholders within the Anaheim region. In addition, TMD had two separate work sessions with City staff to coordinate with City efforts on the ARC project.

The public outreach process for the ART Restructuring Study focused on presenting information and collecting input from key stakeholders, visitors, employees, and residents of The Anaheim Resort. The outreach consisted of the following elements:

- Project Steering Committee
- ART Board meetings
- Stakeholder interviews
- Neighborhood meeting
- Online survey

Each of the groups involved in the outreach effort made contributions to the study's outcome. The role and involvement of each group is summarized below.

### Steering Committee

Established at the beginning of the project, the steering committee consisted of ART Board members, City of Anaheim staff, and OCTA. Curt Pringle and Associates also served as an advisor at the meetings.

Two steering committee meetings were held. The committee was briefed and provided feedback on major study components such as the Market and Service Evaluations and the Governance Alternatives. Input from the steering committee was useful and helped inform ART's role in the hierarchy of transportation services for this study.

### ART Board

Four presentations were made to the ART Board at their monthly meetings. The presentations took place at key study junctures, which included the Market and Service findings, Governance Alternatives, Framework and Guiding Principles, and the Network Plan. Insights provided by the Board helped guide the development of the final Network Plan.

## Stakeholder Interviews

Key stakeholders were identified and interviewed to provide insight for the Guiding Principles and the recommendations. Stakeholder interviews were conducted in early 2012. Groups represented during the interview process included:

- Angels Baseball
- Anaheim Chamber of Commerce
- Anaheim/Orange County Visitor & Convention Bureau
- BRE Properties
- City of Anaheim
- City of Anaheim City Manager
- City of Anaheim Convention Center General Manager
- City of Anaheim Mayor
- City National Grove of Anaheim
- Diocese of Orange County
- The Shops at Anaheim GardenWalk
- Honda Center
- LENNAR
- UCI Medical
- Walt Disney® Parks and Resorts

From the stakeholder interviews, four major themes were identified:

- Continue to focus and build on the current market
- Focus on the customer
- Operate a service that is simple, accessible, and easy to use
- Develop reliable long term funding sources

## Neighborhood Meeting

A presentation on the ART Restructuring Study was given to the Anaheim South District Neighborhood Association at their January meeting. TMD, City of Anaheim staff, and ART's Executive Director attended the meeting. The presentation focused on the study's purpose, goals, objectives, and preliminary market and service findings. The few questions and comments that were received generally indicated that the neighborhood was supportive of the service. It was noted that the ART Board was involved and would be holding study presentations at their monthly meetings, which were open to the public.



## Online Survey

An online survey was made available to all key stakeholders, visitors, employees, and residents in and surrounding The Anaheim Resort to collect responses and form a rider profile. The ART Survey was available from October 2011 to January of 2012. In total, approximately 50 respondents participated in the survey and, of those, 33 completed all survey questions. The survey provided insight regarding the travel habits, attitudes towards transit, and demographics of current customers. Survey results are tabulated in the Appendix. In general the survey indicated:

- 90% of the respondents were guests (did not live or work in the City of Anaheim)
- 93% were visiting for area attractions or to visit friends or relatives
- 86% thought ART's service was excellent or good

As future work efforts to finalize ARC operation and institutional structures continue, additional outreach and survey strategies should be employed to allow for synergy and compatibility between all modal transportation services to be available to the traveling public.

## Outreach Summary

The overall outreach process highlighted the need for ART to continue to focus on the customer, operate a service that is accessible and easy to use, and to develop reliable long term funding sources. The outreach process was helpful in shaping the recommendations in the final plan.



## Section 5 – ATN Governance Options

In addition to the market and service elements, the Anaheim Repost Transportation Restructuring Study reviewed the existing and alternative forms of governance Anaheim Transportation Network (ATN) could consider as the organization moves forward. As an organization ATN is seeking to focus its mission in a growing but economically distinct service area. The manner in which the organization is governed in the future can affect future funding, alternative growth scenarios, the shape of its service area and its ability to keep pace with the growth and development in the area.

### Current Structure

ATN is a private non-profit 501c (4) organization that provides transportation services for visitors, workers, and residents and is governed by a Board of Directors and existing Bylaws. Currently, ATN has a franchise with the City of Anaheim and operates within the City of Anaheim and serves The Anaheim Resort, the Platinum Triangle and downtown Anaheim, as well as limited areas of the cities of Garden Grove, Orange, Santa Ana and Buena Park. Under its current franchise agreement, ninety eight percent of its annual vehicle mile miles must be provided within the City of Anaheim.

### Organizational Options

In the course of the study, the TMD team examined two organizational options for the ATN:

- **Option A:** Organizational Changes under the Existing ATN Corporate Structure
- **Option B:** Formation of Related Entity to Work in Conjunction with or to Replace Existing Corporate Structure

Under Option A, a number of changes would take place including revisions to Bylaws, Articles of Incorporation and potential director/membership revisions. ATN would likely require a California Public Utilities Commission (CPUC) certificate to operate. These changes would not likely increase funding opportunities but would enable the organization to expand its service area, if desired.

Under Option B, a public entity would be formed to work in conjunction with the existing corporate structure. This option would entail the formation of a new Joint Powers Authority (JPA) to act as a related entity to ATN. A JPA is a legislatively created special purpose entity and might provide the organization more latitude in accessing additional funding sources and expand its geographic area for service



provision. It would mean broader public agencies' involvement, governance and support. This alternative would require changes to ATN corporate documents and Board of Directors composition.

Consideration for the potential changes to the ATN governance structure should be driven by the opportunities to obtain additional public funding to sustain future financial needs of the ATN. Such discussions and decisions about the need for alternative governance matters should be focused of the ability of the ATN to strengthen its financial resources in an effort to continue to sustain its current and future ability to provide coordinated and enhanced transportation options. Such discussions and future decisions by the ATN Board of Directors should investigate all opportunities to enhance ATN's ability meet its capital and operating needs.

## Status

The TMD team presented an informational item to the ATN Board at its February 2012 Board meeting. The presentation shared with the ATN Board is included in the appendix. As the ATN service area and menu of transportation services continue to develop and other projects and modes (ARTIC and ARC) come to fruition, ATN may revisit the subject of governance pending further legal review of options, Board of Directors desire to consider broader governance responsibilities, as well as further development of future roles and responsibilities to be undertaken by ATN.

## Section 6 – Guiding Principles

Prior to developing specific service recommendations for the restructuring of the ART system, a framework of guiding principles was established. The principles rely on feedback from stakeholders and the public as well as the findings from the market assessment, service evaluation, and organizational review. The framework and guiding principles were presented to the ART board in May 2012.

### Market

#### **What market(s) should ART serve?**

ART should continue to concentrate on serving the participating hotel properties, parking facilities, transportation hubs, resort and entertainment areas within The Anaheim Resort and the Platinum Triangle. The target audiences for this market are the guests, residents, and employees who travel within The Anaheim Resort and Platinum Triangle. When The Anaheim Resort and the Platinum Triangle grow, ART should respond and adjust services accordingly.

### Service

#### **How can ART continue to deliver efficient and effective service to improve the overall customer experience?**

ART should provide a safe, easy-to-use, direct, and accessible service between hotels, parking facilities, transportation hubs and major attractions. The agency should use technology such as Automatic Passenger Counter (APCs), Automatic Vehicle Locator (AVL), and scheduling to increase operational efficiency. Technology can also be used to improve the customer experience by providing customers with real time bus arrival information through the use of Google Transit or smart phone applications. Additionally, customers will benefit from the procurement of low-floor, easily accessible, faster boarding vehicles appropriately sized for the respective route. ART's service should continue to complement current and future OCTA services and serve infrastructure improvements such as ARC and ARTIC in The Anaheim Resort and Platinum Triangle.

### Financial

#### **How can ART maintain and build financial sustainability?**

The agency should continue to generate revenue through ticket sales, advertising, and assessment fees through a highly effective network of routes together with a highly cost efficient service operation. ATN should also secure long-term funding



sources at a level that will support ART's operational and capital requirements. ATN can do this by developing and supporting a governance structure that could consider a wider range of funding sources. ATN current funding opportunities are limited to the locally generated fees and farebox recovery. Public funding that is available to the traditional public funding sources is not available to the ATN, outside of the 5307 formula funds. Therefore, in order to increase its services, as well as maintain existing level of services, ATN needs to investigate and strategically make decisions, under the governance umbrella, to look at other potential funding sources. Funding opportunities under newly authorized MAP-21 and other state funding options could only be available thru a re-structure of the governance structure of the ATN.

ATN must ensure that the ART service remains both productive and cost effective. The development of service standards can identify when ART should invest, expand, or restructure its service.

## Section 7 – Service Strategies and Recommendations

The ART Restructuring Study incorporates the analysis of the existing market conditions and service performance with the stakeholder feedback to develop a 10-year, long-term vision for the transit system. The recommendations are designed to promote efficiency and effectiveness within the ART system given future funding constraints. The plan is broken down into two phases: the system before ARC is implemented and the system after ARC is implemented. As described in the data review, the proposed fixed-guideway project known as ARC is scheduled for completion in 2018.

- **Pre-ARC (2012-2018):** The plan will focus investment on high performance services that will benefit the greatest number of riders while maximizing ART’s return on investment. When the Anaheim Convention Center Grand Plaza Project is completed in January 2013, routes will be consolidated to operate more efficiently. When ARTIC opens in 2014, some routes will be realigned to serve the transit hub.
- **Post-ARC (2018-2022):** The fixed-guideway project will open in 2018 and it will serve The Anaheim Resort including Disneyland® Resort, Anaheim Convention Center, The Shops at Anaheim GardenWalk, and several hotels and restaurants via Harbor Boulevard and Katella Avenue. ART routes will be adjusted to minimize the duplication of service.

Figure 32 summarizes the changes to each route during the different phases. Map 8 illustrates the ART Network Pre-ARC (2012-2018) and Map 9 illustrated the ART Network Post-ARC (2018-2022). Route profiles that detail complete changes to individual routes are in the Appendix.



Figure 32: Route by Route Recommendations

Route	Pre-ARC Recommendations	Post-ARC Recommendations
1	<b>No Change.</b> Route 1 will continue to serve Disneyland® Resort and The Shops at Anaheim GardenWalk as well as hotels along the existing alignment including Residence Inn, Hyatt, Sheraton, and Crown Plaza. In addition, Route 1 will serve the Red Lion Hotel.	<b>Restructure</b> northern terminus of the route on the east side of Harbor Boulevard where the Disneyland® Transportation Center may potentially be relocated to complement ARC service.
2	<b>No Change.</b> Route 2 will continue to serve the Disneyland® Resort, The Shops at Anaheim GardenWalk, Anaheim Resort RV Park, Motel 6, America's Best Value Inn, and Ramada Plaza.	<b>Restructure</b> northern terminus of the route on the east side of Harbor Boulevard where the Disneyland® Transportation Center may potentially be relocated to complement ARC service.
3	<b>No Change.</b> Route 3 will continue to serve Disneyland® Resort and The Shop at Anaheim GardenWalk as well as hotels along the existing alignment including Portofino Inn and Suites, Double Tree Guest Suites, Days Inn Maingate, Cortona Inn and Suites, and Ramada Limited Suites.	<b>Restructure</b> northern terminus of the route on the eastside of Harbor Boulevard where the new Disneyland® Transportation Center may potentially be located to complement ARC service.
4	<b>Restructure.</b> The Anaheim Convention Center Grand Plaza project is expected to be complete by 2013 and will turn part of Convention Way into a pedestrian plaza with programmable convention space, changing access to the Hilton and Marriott. A new ART bus stop will be constructed as part of the project and will allow for a common pick up point for ART service. Routes 4, 5 and 6 will combine into one route (Route 4), operating at a 10-minute frequency. Guests from all hotels previously served by Routes 4, 5, and 6 will now access Disneyland® via Route 4 from the Grand Plaza bus stop.	<b>Discontinue.</b> Route 4 will be discontinued when ARC service begins in 2018. The proposed ARC alignment will travel directly between Convention Way and a Resort Station on Harbor Boulevard.
5	<b>Discontinue.</b> Guests from hotels previously served by Route 5 will be able to access Disneyland® via Route 4 from the Grand Plaza bus stop.	



Route	Pre-ARC Recommendations	Post-ARC Recommendations
6	<p><b>Discontinue.</b> Guests from hotels previously served by Route 6 will be able to access Disneyland® via Route 4 from the Grand Plaza bus stop.</p>	
7	<p><b>No Change.</b> Route 7's alignment will continue to serve the Disneyland® Resort, Howard Johnson, Residence Inn, and Peacock Suites via Harbor Boulevard, Manchester Avenue, Clementine Street, Katella Avenue, and South Anaheim Boulevard.</p>	<p><b>Discontinue.</b> Route 7 will be discontinued when ARC service begins in 2018. Greenwood Suites currently served by Route 7, will be served by Route 8. Howard Johnson will be served by Route 10.</p>
8	<p><b>No Change.</b> Route 8's alignment will continue to serve the Disneyland® Resort, Islander Inn, La Quinta Inn &amp; Suites, and Worldmark via Harbor Boulevard, Katella Avenue, Clementine Street, Disney Way, and Zeyn Street.</p>	<p><b>Restructure.</b> Route 8 will be realigned to serve hotels east of The Shops at Anaheim GardenWalk that are not within walking distance of the ARC stop on Clementine Street adjacent to The Shops at Anaheim GardenWalk. This includes Greenwood Suites, Peacock Suites, and Residence Inn. Guests staying at WorldMark, La Quinta, and Extended Stay America will have direct access to ARC at the corner of Katella Ave and Clementine Street.</p> <p>The northern terminus of the route will also be realigned to the east side of Harbor Boulevard where the Disneyland® Transportation Center may potentially be relocated to complement ARC service.</p>
9	<p><b>No Change.</b> Route 9 will continue to provide coverage to those hotels west on Katella Avenue, including Desert Palm Inn and Suites, Anabella Hotel, Best Western Stovall's Inn, and Best Western Pavilions.</p>	<p><b>Restructure</b> northern terminus of the route on the east side of Harbor Boulevard where the Disneyland® Transportation Center may potentially be relocated to complement ARC service.</p>
10	<p><b>No Change.</b> Route 10 will continue to provide coverage to hotels north on Harbor Boulevard including Ramada Limited Maingate North, Days Inn and Suites, and America's Best Inn.</p>	<p><b>Restructure</b> northern terminus of the route on the east side of Harbor Boulevard where the Disneyland® Transportation Center may potentially be relocated to complement ARC service.</p>



Route	Pre-ARC Recommendations	Post-ARC Recommendations
11	<b>No Change.</b> Route 11 will continue to provide coverage to hotels north on Ball Road and Walnut Street including Ménage, Days Inn Anaheim West, and the Holiday Inn Hotel & Suites.	<b>Restructure</b> northern terminus of the route on the east side of Harbor Boulevard where the Disneyland® Transportation Center may potentially be relocated to complement ARC service.
12	<b>No Change.</b> Route 12 will continue to serve Disneyland® Resort, the Anaheim Convention Center, as well as Comfort Inn and Suites and the Holiday Inn on Manchester Avenue.	<b>Restructure</b> northern terminus of the route on the east side of Harbor Boulevard where the Disneyland® Transportation Center may potentially be relocated to complement ARC service.
14	<b>Restructure Post-ARTIC.</b> Route 14 will continue to provide service to the Anaheim Amtrak/Metrolink Station as well as hotels along Orangewood Avenue and Chapman Avenue including Best Western Raffles, Ayres Hotel, and Hilton Suites. Post-ARTIC, Route 14 will be restructured to connect with ARTIC.	<b>Restructure</b> northern terminus of the route on the east side of Harbor Boulevard where the Disneyland® Transportation Center may potentially be relocated to complement ARC service.  Routes 14 will also pick up guests at the Ayres hotel previously served by Route 15.
15	<b>Restructure Post-ARTIC.</b> Route 15 will continue to provide service to Disneyland® Resort, The Shops at Anaheim GardenWalk, Stadium Lofts, Ayres Hotel, Townplace Suites, and Anaheim Amtrak Station. Post-ARTIC, Route 15 will be restructured to connect with ARTIC.	<b>Discontinue.</b> Route 15 will be discontinued when ARC service begins in 2018 since the proposed ARC alignment will travel directly between the Anaheim Amtrak/Metrolink Station/ARTIC and Disneyland. Route 14 will serve the Ayres Hotel.
16	<b>No Change.</b> Route 16 will continue to serve destinations and hotels south of The Anaheim Resort including Crystal Cathedral, Outlets at Orange, Best Western Meridian Inn & Suites, and Holiday Inn Express.	<b>Restructure</b> northern terminus of the route on the east side of Harbor Boulevard where the Disneyland® Transportation Center may potentially be relocated to complement ARC service.
17	<b>No Change.</b> Route 17 will continue to provide service to the Toy Story Parking Lot, The Shops at Anaheim GardenWalk, and Disneyland® Resort.	<b>Discontinue.</b> Route 17 will be discontinued. This recommendation assumes the Toy Story Parking Lot will be relocated along the ARC alignment. <sup>6</sup>

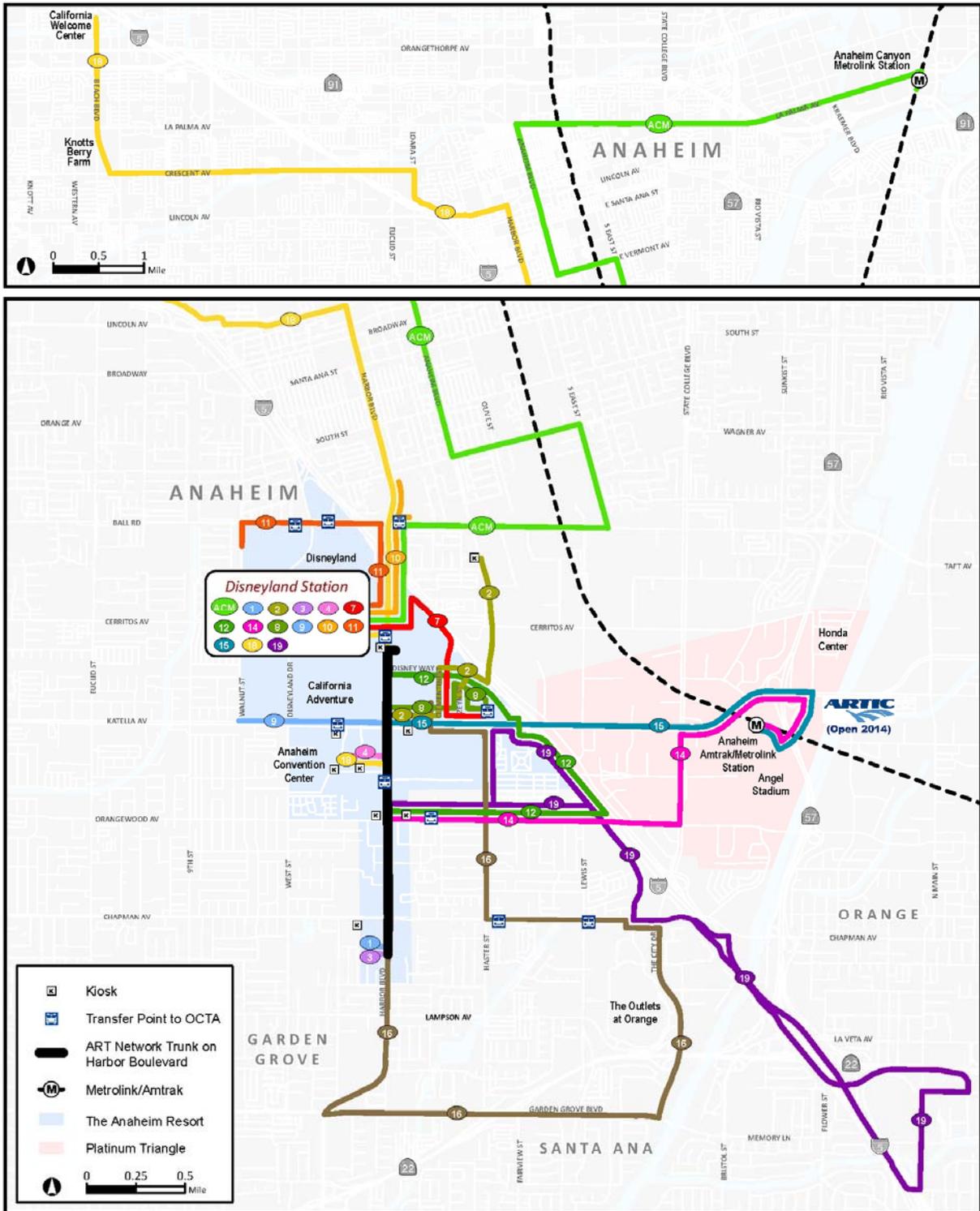
<sup>6</sup> The Conditional Use Permit for the Toy Story Parking lot expires in 2019. Route 17 may operate until 2019 in order to provide an additional year to transition parking to a location along ARC.



Route	Pre-ARC Recommendations	Post-ARC Recommendations
18	<p><b>No Change.</b> Route 18 began serving Knott's Berry Farm in the Spring of 2012. ART is currently monitoring the performance of this service. As demand warrants service, the route will remain operating along the same alignment.</p>	<p><b>Restructure</b> to serve the east side of Harbor Boulevard where the Disneyland® Transportation Center may potentially be relocated to complement ARC Service.</p>
19	<p><b>No Change.</b> Route 19 began serving Westfield Main Place and Discovery Science Center in the Spring of 2012. ART is currently monitoring the performance of this service. As demand warrants the route will remain operating along the same alignment.</p>	<p><b>Restructure</b> northern terminus of the route on the east side of Harbor Boulevard where the Disneyland® Transportation Center may potentially be relocated to complement ARC service.</p>
ACM	<p><b>Restructure.</b> The Anaheim Canyon Metrolink Connector (ACM) will be expanded to provide peak service connecting the Anaheim Canyon Metrolink Station, downtown Anaheim and The Anaheim Resort.</p>	<p><b>Restructure</b> the route to stop at the ARC Resort Station and locations further south on Harbor Boulevard as needed.</p>



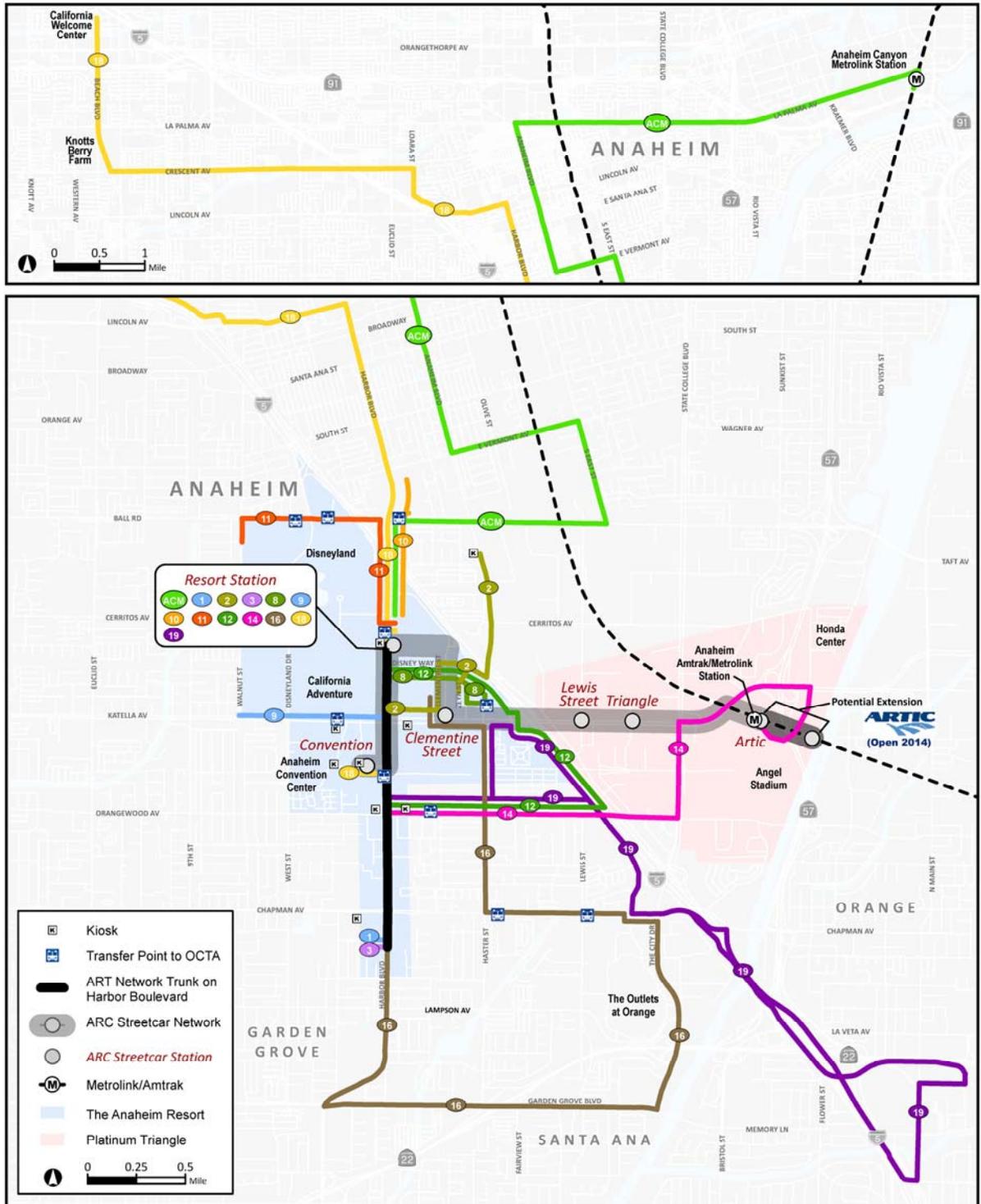
Map 8: ART Network Pre-ARC





ANAHEIM RESORT TRANSPORTATION RESTRUCTURING

Map 9: ART Network Post-ARC





## Proposed Service Levels

With the exception of a handful of routes, ART should continue to provide service approximately every twenty (20) minutes. This frequency is comparable to other resort areas and provides a reasonable balance between customer wait times and operating costs. Between the time ARTIC is complete (2014) and ARC service begins (2018), demand along Route 14 and 15 should be monitored and frequency adjusted as appropriate. Proposed frequencies for each phase are listed in Figure 33.

*Figure 33: Proposed Service Levels by Route*

Route	Existing	Pre-ARC	Post-ARC
<b>1</b>	20	20	20
<b>2</b>	20	20	20
<b>3</b>	20	20	20
<b>4</b>	20	10	Discontinue
<b>5</b>	20	Discontinue	-
<b>6</b>	20	Discontinue	-
<b>7</b>	20	20	Discontinue
<b>8</b>	20	20	20
<b>9</b>	20	20	20
<b>10</b>	20	20	20
<b>11</b>	20	20	20
<b>12</b>	20	20	20
<b>14</b>	30	30	30
<b>15</b>	60	30	Discontinue
<b>16</b>	60	60	60
<b>17</b>	20	20	Discontinue
<b>18</b>	60	60	60
<b>19</b>	60	60	60
<b>ACM</b>	7 peak trips	7 peak trips	7 peak trips



## Fleet

Figure 34 summarizes the total bus fleet projected for each year. The full fleet requirements by route are included in the Appendix. As vehicles need to be replaced, ART should continue to invest in low-floor, easily accessible vehicles appropriately sized for the respective route and property served.

*Figure 34: Fleet Requirements*

Year	Total Fleet
<b>FY12 Budget</b>	57
<b>FY12 Actual</b>	57
<b>Year 1 FY2013 (ACC Grand Plaza Complete)</b>	65
<b>Year 2 FY2014 (ARTIC Opens)</b>	68
<b>Year 3 FY2015</b>	68
<b>Year 4 FY2016</b>	68
<b>Year 5 FY2017</b>	68
<b>Year 6 FY2018 (ARC Service Launches)</b>	29
<b>Year 7 FY2019</b>	29
<b>Year 8 FY2020</b>	29
<b>Year 9 FY2021</b>	29
<b>Year 10 FY2022</b>	29

## Technology Support

ART should begin to invest in Automatic Vehicle Location (AVL), Automatic Passenger Counters (APC), and scheduling technology. Collecting reliable data is important for managing productive, cost effective daily operations, especially given the daily variation of demand within the ART service area. Customer focused technology such as a real time bus arrival system at key locations and smart phone applications are also recommended and build on the availability of AVL data. Prior to ARC service beginning in 2018, ART and ARC should consider opportunities to coordinate the purchasing and use of real time arrival information, scheduling software, and/or APC, AVL technology.



## Section 8 – Financial Projections

Based on the preferred operating scenario and assumed ARC alignment, financial projections were developed for ATN that included operating costs, generated revenues, capital costs, and funding. Actual budget figures were used to develop a baseline for fiscal year 2012. Projections were then carried out annually for ten years until fiscal year 2022. Figure 35 summarizes the financial projections for 2012 – 2022.

### Overview

Financial projections were based on projected service levels. Service levels are projected to be stable from 2013 – 2017 decreasing by nearly 56 percent when ARC service begins and the ART service network is reconfigured.<sup>7</sup> From an operating perspective ART revenues combined with an annual operating reserve are sufficient to fund projected service levels until 2019. The operating deficit can be mitigated if ART were to retain the rebate funds given back to the hotels annually. It should be explored whether some of ART administrative costs could be jointly shared with ARC.<sup>8</sup>

ART's capital program is largely funded through federal grant funds. Although shown on an annualized basis, the capital program can be streamed to coincide with the availability of grant funds and available local match. In addition, as with the operating funding, ART's capital program should be coordinated with and provisions made in conjunction with the development of the ARC.

ART will out run its current funding base unless increases in current funding sources are made and/or additional funding sources are found. It is recommended that **ART's funding requirements should be considered in conjunction with the ARC funding and operation**; since the service areas and markets are similar and the services need to be coordinated and integrated.

### Operating Costs

#### Direct Operating Costs

Line items contributing to direct operating costs include bus leasing, bus maintenance, fuel supplies and transportation expenses. To project direct operating

---

<sup>7</sup> Most of the service reduction is related to the discontinuation of Route 17 serving Toy Story parking facility

<sup>8</sup> ART's current administrative overhead of just 18 percent reflects a highly cost effective organization. However, the planned 56 percent reduction in service and commensurate reduction in operating revenue and fees when ARC opens is challenging to ongoing financial sustainability.



costs annually, revenue hour and revenue mile unit costs along with annual inflation factors, were applied to the change in associated revenue hours and miles from the baseline (or previous year). Therefore increases to contracted operating rates and changes in operating levels can be factored independently.

Primarily key milestones including the completion of the Anaheim Convention Center Grand Plaza, the opening of ARTIC, and the implementation of ARC service drove forecasted operating levels for the preferred service plan.

### Overhead Costs

The remaining costs were included as overhead, which are not directly correlated to changes in operating levels. These costs were built from the baseline figures provided by ART and were forecasted by applying annual growth factors to each line item.

## Generated Operating Revenue

The majority of ART revenues are generated through hotel and retail assessment fees, route assessment fees, ticket sales, and advertising. Again, baseline revenues were provided by ART and projected annually for ten years until fiscal year 2022.

### Hotel and Retail Assessment Fees

Hotel and retail assessment fees are currently set up to remain constant over the next 10 years. This does not appear to be a financially sustainable assessment model as operating costs are continually increasing. ***The assessment fee model should be reevaluated to compensate for increasing costs as ART moves forward.***

### Service Fees

Routes that receive revenue from fees established and approved by the ATN Board of Directors through a contractual relationship include Routes 17, 18, 19, and the Anaheim Canyon Metrolink (ACM) shuttle. The Route 17 fee remains a line item until ARC comes online in 2018 eliminating the need for a parking shuttle service. The direct operating cost and generated fare revenue of Route 18 and 19 are also listed as a line item in the financial model. This replicates the current cost model for these routes where the associated city covers the difference in operating cost after fare revenues are collected. The operating costs for ACM are fully covered under a 5-year grant awarded by OCTA. ART should continue operate this service beyond the 5-year horizon if the operating costs are fully covered.

### Ridership Revenue

To project future ridership, the current ridership figures were used and a 2% growth factor was applied annually to all routes except Route 14 and 15. Different growth



rates were applied to Route 14 and 15 to take into account of a potential increase in service frequency, generating more demand. If warranted, Route 15's frequency was projected to change from a 60-minute frequency to a potential frequency of every 15 minutes. Because of this, a growth factor of 100 percent was applied to the projections for FY2014. The growth factor drops back down to 2 percent the following years.

## Capital Cost

In addition to operating costs and revenues, capital costs were included in the financial projections. Capital costs consisted of vehicle replacement and expansion, associated technology and equipment upgrades, and new operating/maintenance facility costs.

In year 1, fiscal year 2013, ART will purchase 20 new buses along with GFI validating fareboxes and AVL voice annunciation and predictive arrival systems for each bus and select stop locations. After Year 1, buses are replaced according to their average life span and a predetermined fleet replacement schedule that has been included in the plan. Support vehicles have also been incorporated in the capital cost plan following their own replacement schedule. The model applies unit costs to the number of required items each year, along with an annual inflation factor for each item to determine the total capital cost.

The most significant annual cost is seen in Year 1 with the purchase of 20 new vehicles, and then again in Year 9, when 17 of these 20 vehicles are up for replacement (8 year average lifespan).

## Capital Funding

Annual funding figures were provided directly by ART. Year 1 funding includes grants for Clean Fuels Program, and State of Good Repair to cover the purchase of 20 new service vehicles. Other funds acquired each year include Federal 5307 funds and Local MSCR funds. Since buses are not up for replacement during every fiscal year, capital funds are carried over when significant purchases are not required, and then apportioned when vehicles are due for replacement. This allows ART to replace vehicles with low floor buses appropriately over time.



Figure 35: ART Financial Summary

Summary	Baseline		ACC Grand Plaza Complete		ARTC Opens		ARC Service Launches		Year 6 FY2018	Year 7 FY2019	Year 8 FY2020	Year 9 FY2021	Year 10 FY2022
	FY12 Budget	FY12 Actual	Year 1 FY2013	Year 2 FY2014	Year 3 FY2015	Year 4 FY2016	Year 5 FY2017	Year 6 FY2018	Year 7 FY2019	Year 8 FY2020	Year 9 FY2021	Year 10 FY2022	
<b>Operating Revenues</b>													
Ticket Sales	\$ 4,326,700	\$ 4,243,624	\$ 5,296,396	\$ 5,508,792	\$ 5,621,022	\$ 5,735,559	\$ 5,852,450	\$ 4,148,019	\$ 4,226,772	\$ 4,307,169	\$ 4,389,246	\$ 4,473,038	
Hotel Assessment	\$ 1,860,000	\$ 1,819,184	\$ 1,776,000	\$ 1,776,000	\$ 1,826,000	\$ 1,926,000	\$ 1,926,000	\$ 1,926,000	\$ 1,926,000	\$ 1,926,000	\$ 1,926,000	\$ 1,926,000	
Route 17 Assessment	\$ 3,956,945	\$ 4,331,952	\$ 4,530,818	\$ 4,621,434	\$ 4,898,720	\$ 5,241,631	\$ 5,556,129	\$ -	\$ -	\$ -	\$ -	\$ -	
Other	\$ 1,158,631	\$ 1,380,201	\$ 1,930,103	\$ 1,991,790	\$ 2,046,287	\$ 2,102,659	\$ 2,160,973	\$ 2,221,299	\$ 2,283,711	\$ 2,346,283	\$ 2,415,095	\$ 2,484,227	
Total Operating Revenues	\$ 11,302,276	\$ 11,774,961	\$ 13,533,316	\$ 13,898,016	\$ 14,392,030	\$ 15,005,849	\$ 15,495,552	\$ 8,295,318	\$ 8,436,482	\$ 8,581,452	\$ 8,730,341	\$ 8,883,265	
<b>Total Operating Expenses</b>													
Total Operating Expenses	\$ 10,701,208	\$ 11,386,808	\$ 12,781,822	\$ 13,931,325	\$ 14,415,683	\$ 14,930,555	\$ 15,477,368	\$ 8,548,168	\$ 8,934,861	\$ 9,351,559	\$ 9,800,456	\$ 10,284,028	
<b>Operating Expense/Revenue Summary</b>													
Net Operating Revenue	\$ 601,068	\$ 388,153	\$ 751,494	\$ (33,309)	\$ (23,653)	\$ 75,293	\$ 18,184	\$ (252,850)	\$ (498,379)	\$ (770,107)	\$ (1,070,115)	\$ (1,400,763)	
Annual Reserve	\$ 240,000	\$ 240,000	\$ 383,455	\$ -	\$ -	\$ 75,293	\$ 18,184	\$ -	\$ -	\$ -	\$ -	\$ -	
Net Operating Revenue After Reserve	\$ 361,068	\$ 148,153	\$ 368,040	\$ (33,309)	\$ (23,653)	\$ -	\$ -	\$ (252,850)	\$ (498,379)	\$ (770,107)	\$ (1,070,115)	\$ (1,400,763)	
Accumulated Carryover	\$ 601,068	\$ 388,153	\$ 1,139,647	\$ 1,106,338	\$ 1,082,685	\$ 1,157,979	\$ 1,176,163	\$ 923,313	\$ 424,394	\$ (345,173)	\$ (1,415,289)	\$ (2,816,052)	
<b>Capital Expenses</b>													
Total Capital Expenses	\$ -	\$ -	\$ 4,896,917	\$ 1,538,392	\$ 17,505	\$ -	\$ -	\$ 2,493,708	\$ 19,702	\$ 20,293	\$ 7,741,571	\$ -	
<b>Capital Funding</b>													
Transfer from Operating Carryover													
ATM Capital Funding	\$ 678,367	\$ 678,367	\$ 600,000	\$ 600,000	\$ 620,000	\$ 640,000	\$ 660,000	\$ 680,000	\$ 700,000	\$ 720,000	\$ 740,000	\$ 760,000	
State of Good Repair		\$ 1,866,266											
Clean Fuel Grant		\$ 1,700,500											
Local Funding (MSRC)		\$ 625,000											
Capital Carryover		\$ 678,367	\$ (26,784)	\$ (965,176)	\$ (362,681)	\$ (362,681)	\$ 277,319	\$ 937,319	\$ (876,389)	\$ (196,091)	\$ 503,616	\$ (6,497,955)	
Total Capital Funding	\$ -	\$ 678,367	\$ 4,870,133	\$ 573,216	\$ (345,176)	\$ 277,319	\$ 937,319	\$ 1,617,319	\$ (176,389)	\$ 523,909	\$ 1,243,616	\$ (5,737,955)	
<b>Capital Summary</b>													
Overall Capital Net	\$ 601,068	\$ 678,367	\$ (26,784)	\$ (965,176)	\$ (362,681)	\$ 277,319	\$ 937,319	\$ (876,389)	\$ (196,091)	\$ 503,616	\$ (6,497,955)	\$ (5,737,955)	



## Section 9—Sustainable Community Strategies

### Overview

In light of state climate change legislation (AB 32, SB 375), California metropolitan regions are required to set targets for greenhouse gas emissions and outline methods to reach these targets. By linking transit planning with land use planning, ART and the City of Anaheim can help achieve these goals while facilitating the creation of a sustainable region. Coordinating land use development with transit also results in more effective services.

In recent times, transit followed land development. Historically, transit led land development. Establishing a strategy where transit planning is intertwined with the development of communities is critical to the Sustainable Communities Strategy.

### Strategies

A number of land use/ transit development strategies have received significant attention in the past decade. The strategies form central tenets in any Sustainable Communities Strategy.

**Transit Oriented Development (TOD):** Development more conducive to transit often features high density residential and commercial uses near major transportation routes. TOD promotes the use of transit as an alternative means of transportation to major travel destinations, including schools, shopping centers, employment centers, and recreational destinations.

Several transit-oriented developments have taken place in and around The Anaheim Resort® and the Platinum Triangle™. These projects integrated with ARTIC can add to a vibrant community.

**Transit Priority Corridors:** Transit works well where a variety of land uses are present on a single corridor, allowing passengers to access many destinations on a single route. Emphasizing major travel corridors will provide the strong backbone from which the ART system can grow as a robust network.

This principle has been applied to several corridors (Harbor Boulevard, Katella Avenue) in and around The Anaheim Resort and the Platinum Triangle where high density residential neighborhoods are linked with a variety of major travel destinations.



**Parking Disincentives:** An auto-centric environment is exacerbated by virtually unlimited free parking at every destination. In addition, at non-TOD development, street-side parking fields disconnect transit stops from destination buildings.

Economically, excessive parking supply consumes valuable Anaheim land and encourages the use of automobiles as a dominant means of travel. The City of Anaheim is moving in the right direction by reasonably limiting parking supply. This not only encourages the use of sustainable modes, like transit, but also frees up space for potential development projects that can contribute to a stronger economy.

## Summary

The plan proposed by TMD builds on existing demand to promote ART service and over time reconfigures the network and interfaces with the proposed ARTIC and ARC.



## Section 10 – Next Steps

The ART Transit Restructuring Study recommendations respond to the changes and future transportation projects planned for the ART service area from 2012 through 2022. Over the next ten years, ARTIC, ARC and California High Speed Rail will be in the plan, design and build phases. As large and complex as these projects are, changes can be expected as part of the design build processes. For this reason ATN should use the study recommendations as a base which they can build on and use to respond to developments in the ATN service area.

In light of the long term nature of the study recommendations, ATN will want to build on the study findings as it continues to participate in the development of The Anaheim Resort. To this end, the ATN will want to:

- **Adopt and implement the study recommendations.** The Board and staff have worked to develop a plan to guide the development of the ART service over the next 10 years. The study provides the plan and policy foundation for continued focus on the organization’s role in servicing and participating in the development plans for The Anaheim Resort.
- **Continue to actively participate in the technical, policy and advisory committees associated with the ARC Alternatives Analysis project.** The scope/service area, types of services, funding and service pricing of the ARC service will affect ART’s service. Though in its early stages, there is an opportunity to “build in” ART as a seamless integrated service with ARC. Moreover, there may be synergies in terms of capital investment (maintenance, office, administrative facilities) and operating functions that ATN can participate in as the project is developed to its final form(i.e. ATN could explore opportunities to serve as the operating entity for the ARC).
- **Coordinate ART and ARC service levels and spans, service pricing operating schedules and service funding.** This will provide seamless integration for the customers, making transit service within The Anaheim Resort easy-to-use, direct, and accessible.
- **Review governance issue.** The ATN Board of Directors has been briefed on alternative governance options. As transportation plans are developed and implemented for The Anaheim Resort, the governance issue should be revisited to determine the best governance alternative for the ATN.

## Appendix

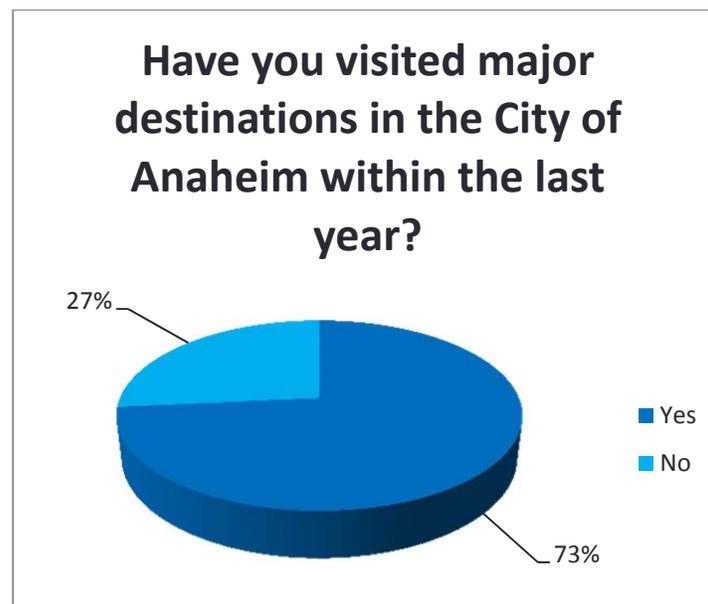
### Appendix A: Online Survey Results

An online survey was made available to all key stakeholders, visitors, employees, and residents in and surrounding The Anaheim Resort to collect responses and form a rider profile. The ART Survey was available from October 2011 to January of 2012. In total, approximately 50 respondents participated in the survey and, of those, 33 completed all survey questions. The survey provided insight regarding the travel habits, attitudes towards transit, and demographics of current customers.

#### Recently Visited the City of Anaheim

Figure 36 displays survey respondents that have or have not visited key destinations within the City of Anaheim in the last year. Key destinations include: theme parks, shopping, restaurants, convention center, and sports or entertainment venues.

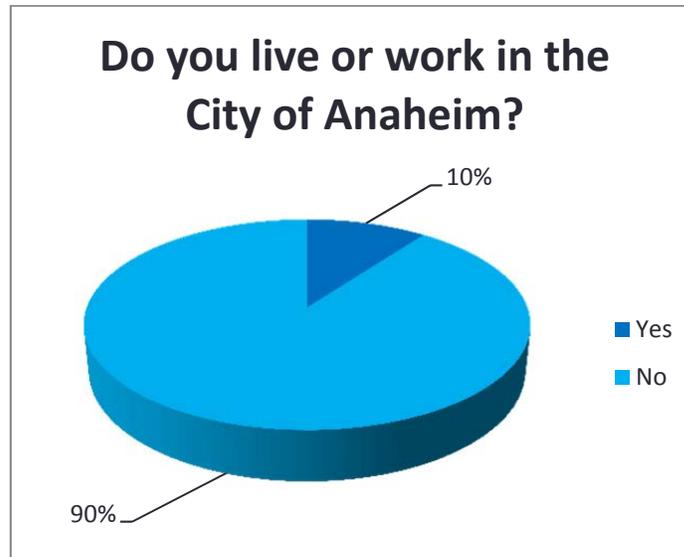
*Figure: 36 Recently Visited the City of Anaheim*



#### Live or Work in the City of Anaheim

Figure 37 displays the percent of survey respondents that indicated whether or not they live or work in the City of Anaheim. The majority of respondents did not live or work in the City of Anaheim.

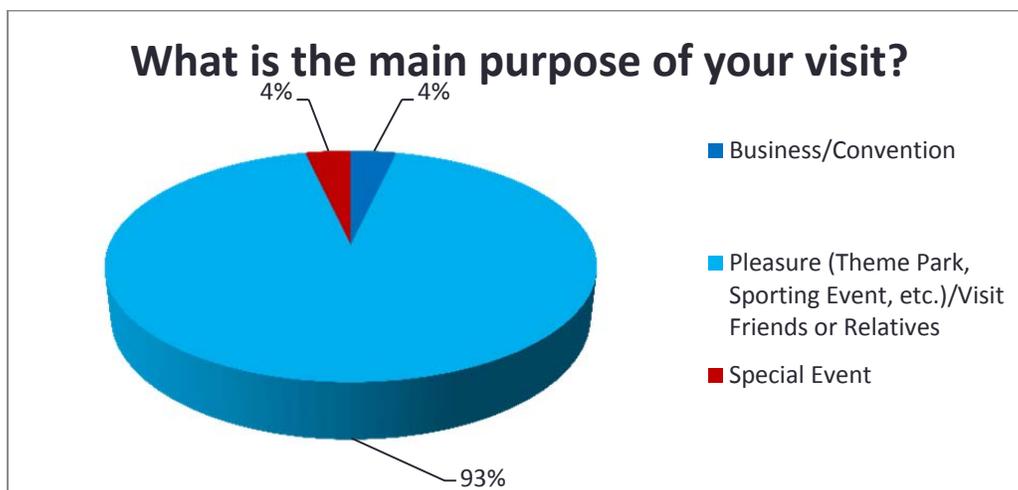
Figure 37: Live or Work in the City of Anaheim



### Main Purpose of Visit

Figure 38 displays the various purposes of a survey respondent's visit to the City of Anaheim. The majority of respondents travel to the City of Anaheim for pleasure. Pleasure visits include: theme park trips, sporting events, and visiting friends or relatives.

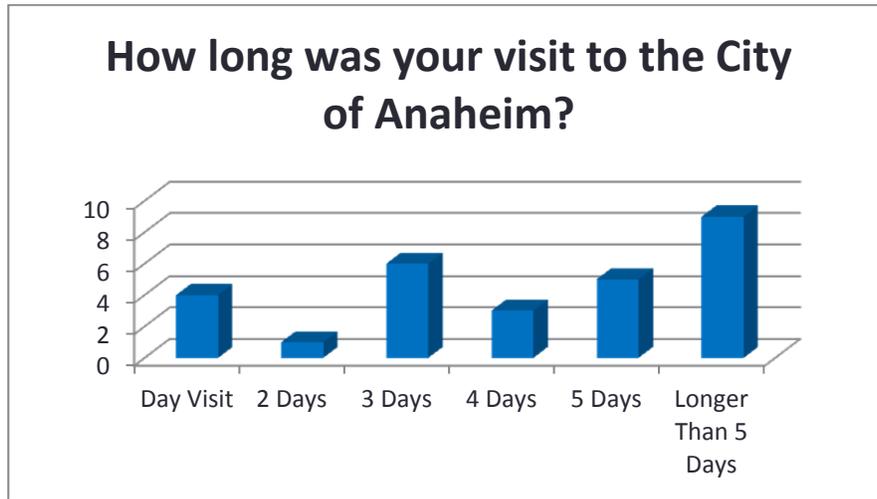
Figure 38: Main Purpose of Visit



**Duration of Stay**

Figure 39 displays the durations of stay in the City of Anaheim for survey respondents.

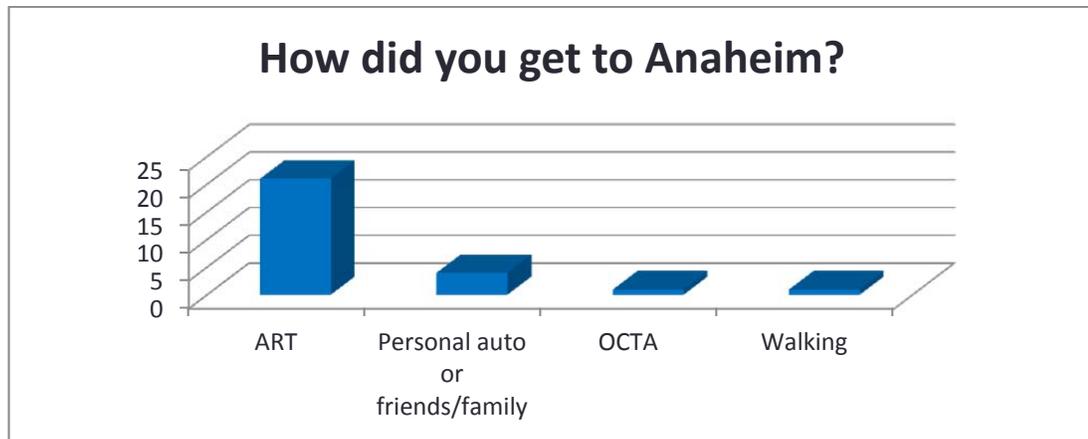
*Figure 39: Duration of Stay*



**Primary Mode of Transportation**

Figure 40 displays the primary mode of transportation for each survey respondent. The majority of respondents use ART.

*Figure 40: Primary Mode of Transportation*

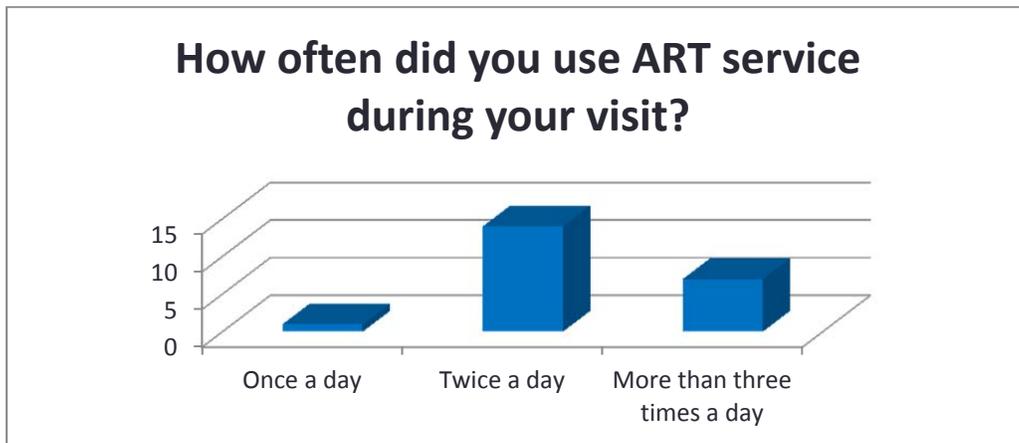




### Frequency of Use

Figure 41 displays how often survey respondents used ART during their visit. The majority of respondents used ART twice a day.

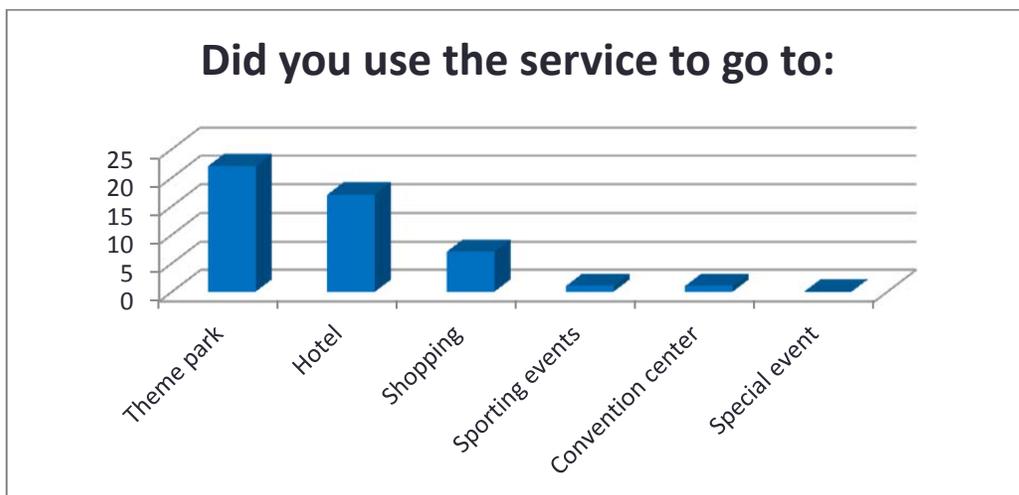
Figure 41: Frequency of Use



### Destination

Figure 42 displays the destinations of those survey respondents that used ART during their visit to the City of Anaheim. The majority of respondents used ART to get to theme parks and hotels.

Figure 42: Destination

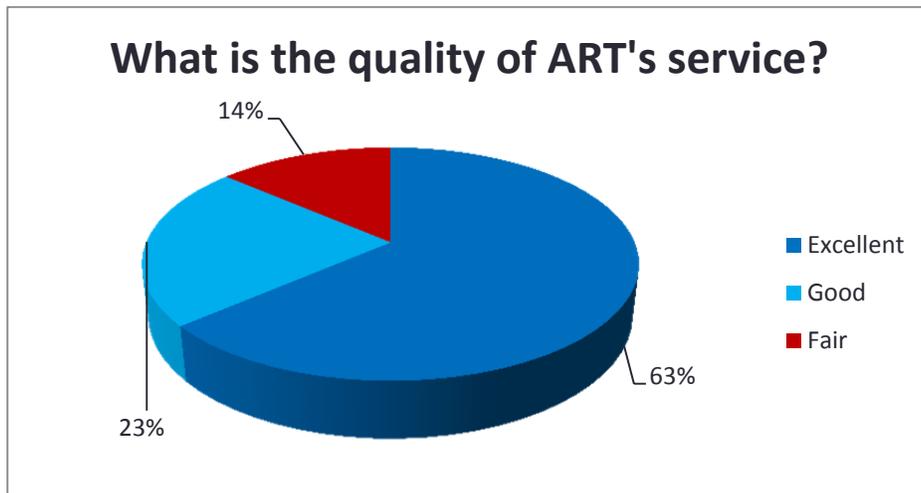




### Quality of Service

Figure 43 displays how survey respondents rated ART's quality of service. The majority of respondents found ART's service to be excellent.

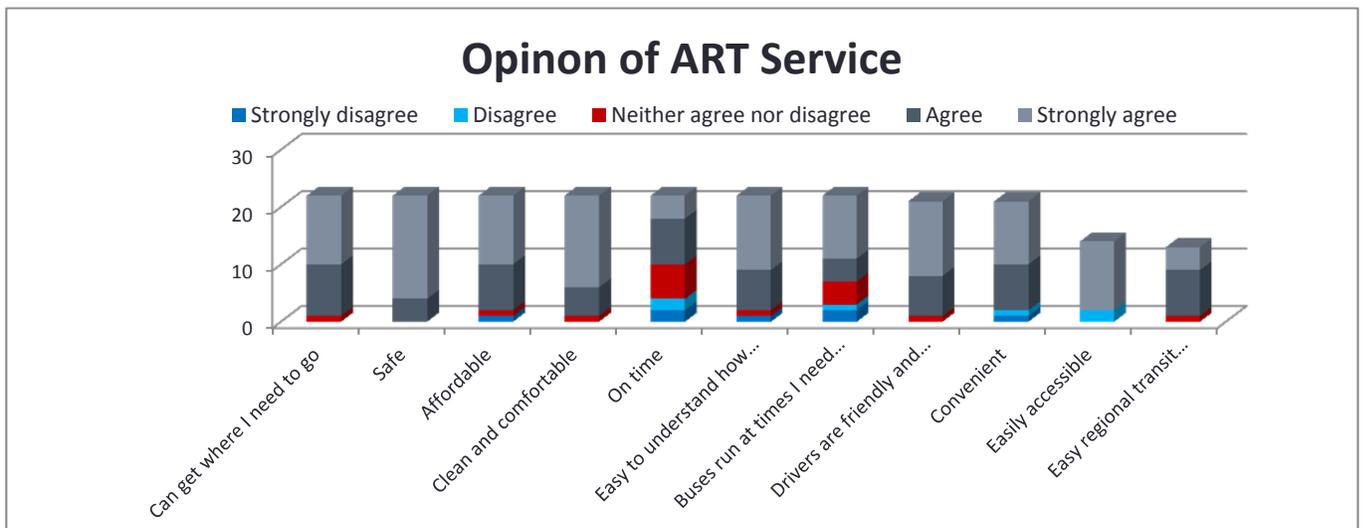
Figure 43: Quality of Service



### Opinion of ART Service

Figure 44 displays survey respondents' opinion of ART service. Opinions included whether service is safe, affordable, comfortable, etc.

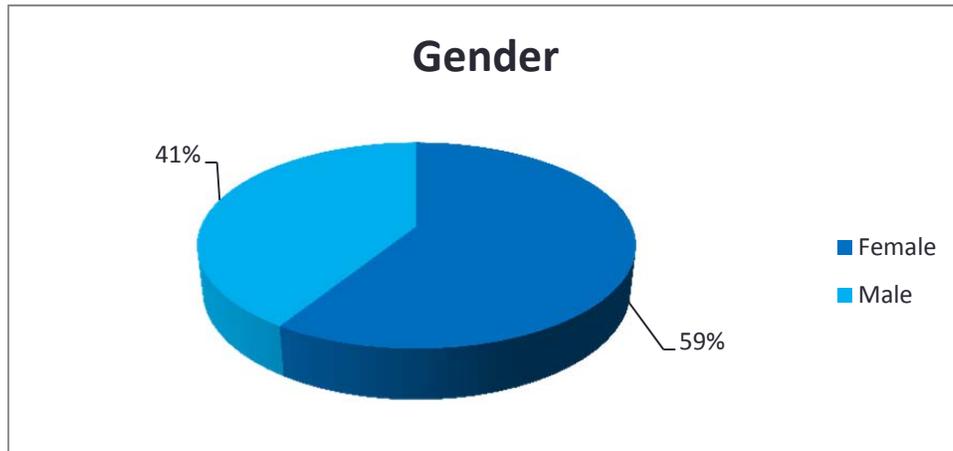
Figure 44: Opinion of ART Service



### Gender

Figure 45 below displays the gender of survey respondents.

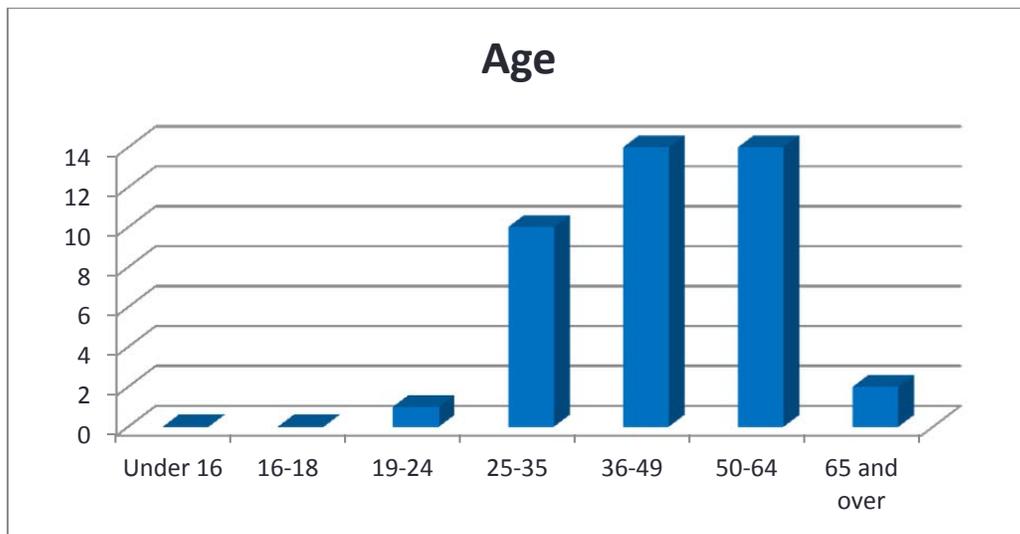
Figure 45: Gender



### Age

Figure 46 below displays the age range of survey respondents.

Figure 46: Age

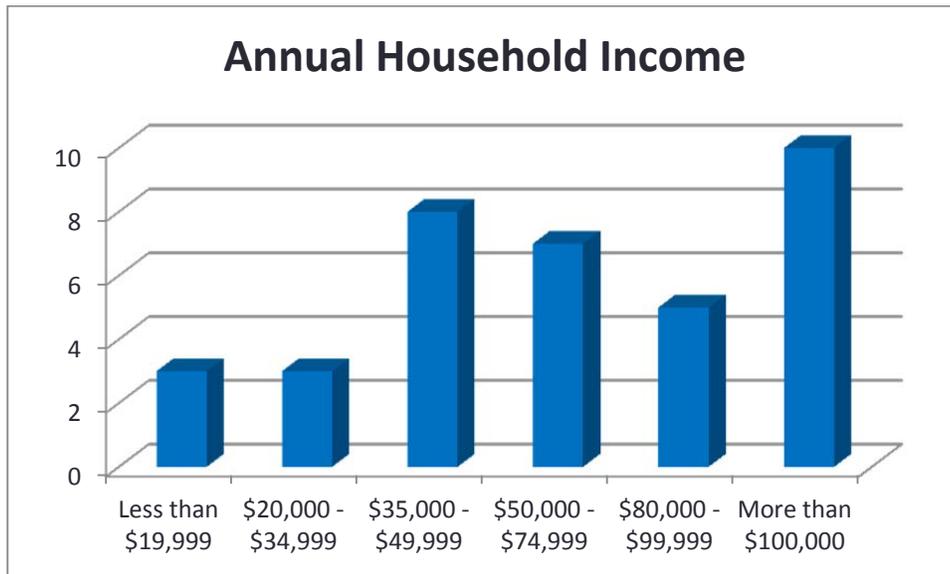




### Annual Household Income

Figure 47 below displays the annual household income range of survey respondents.

*Figure 47: Annual Household Income*





## Appendix B: ATN Governance Options, February 2012 Board Presentation



# ANAHEIM RESORT TRANSIT RESTRUCTURING STUDY

## Project Update

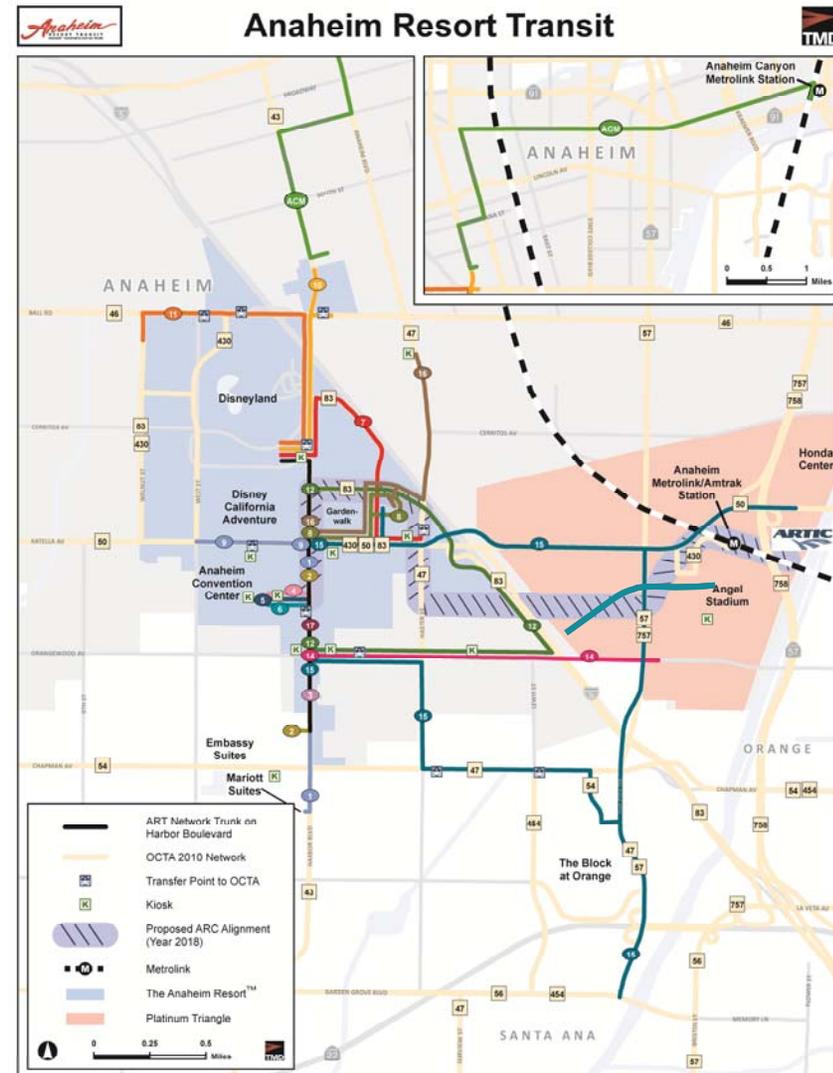
February 2012

# Outline

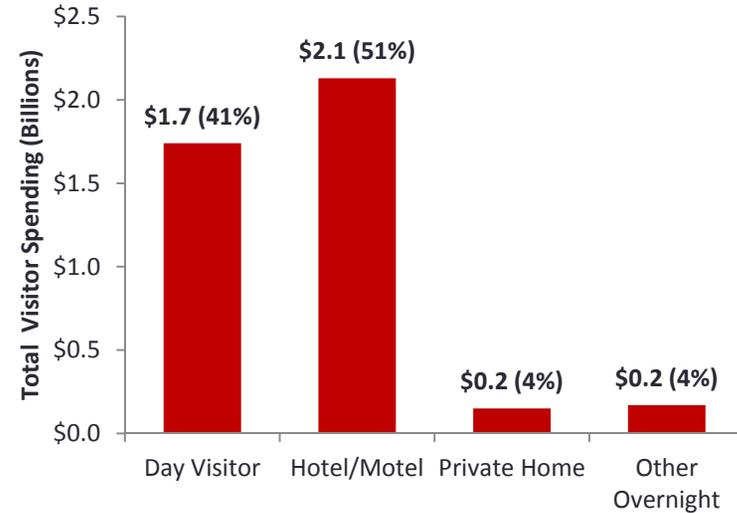
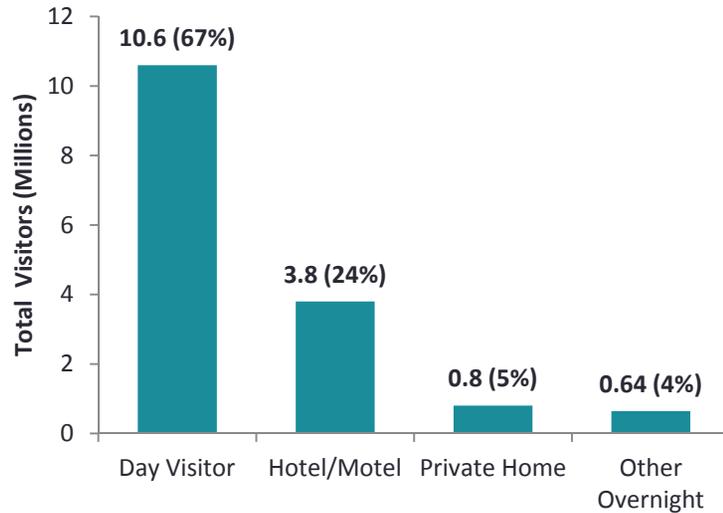
- ART Overview
  - Market Conditions
  - Service Evaluation
  - Future Financial Growth & Sustainability Considerations
  - Stakeholder Outreach
- Governance
  - Why Consider Governance Options?
  - Current Structure Issues
  - Future Options

# Anaheim Market Overview

- ART serves a unique market which includes numerous resorts and attractions:
  - The Anaheim Resort™, Disneyland Resort, Convention Center, Sports Stadiums, Major Shopping



# Anaheim Visitor

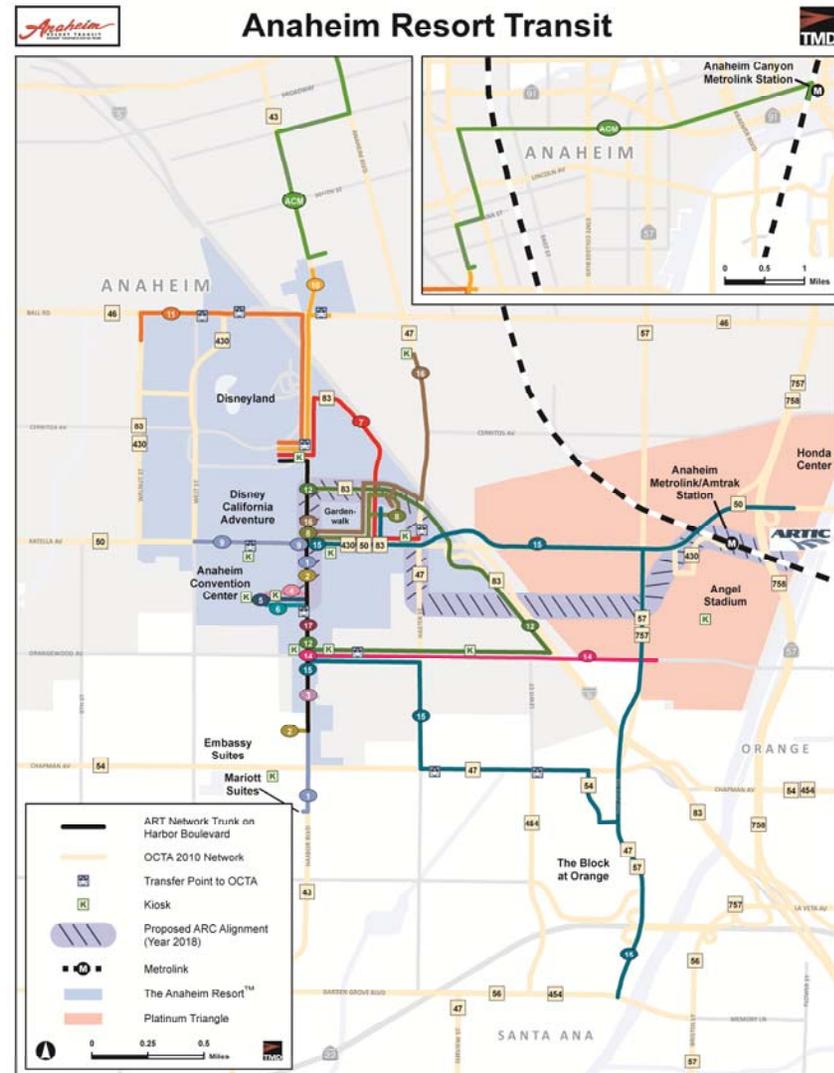


- Day visitors account for 67% of total visitor to Anaheim, but only 41% of total Anaheim visitor spending
- Hotel/motel guests account for 24% of total visitors to Anaheim, but 51% of total Anaheim visitor spending

Data Source: Anaheim/Orange County Visitor & Convention Bureau (2010)

# ART Service Characteristics

- 15 fixed bus routes, plus ACM shuttle and Route 17
- 42 peak buses, 65 total buses
- Operate a minimum 20 minute frequency
- Service spans based on day-type and park hours
- Service tailored to peak and off-peak season (varying resort occupancy and park attendance)



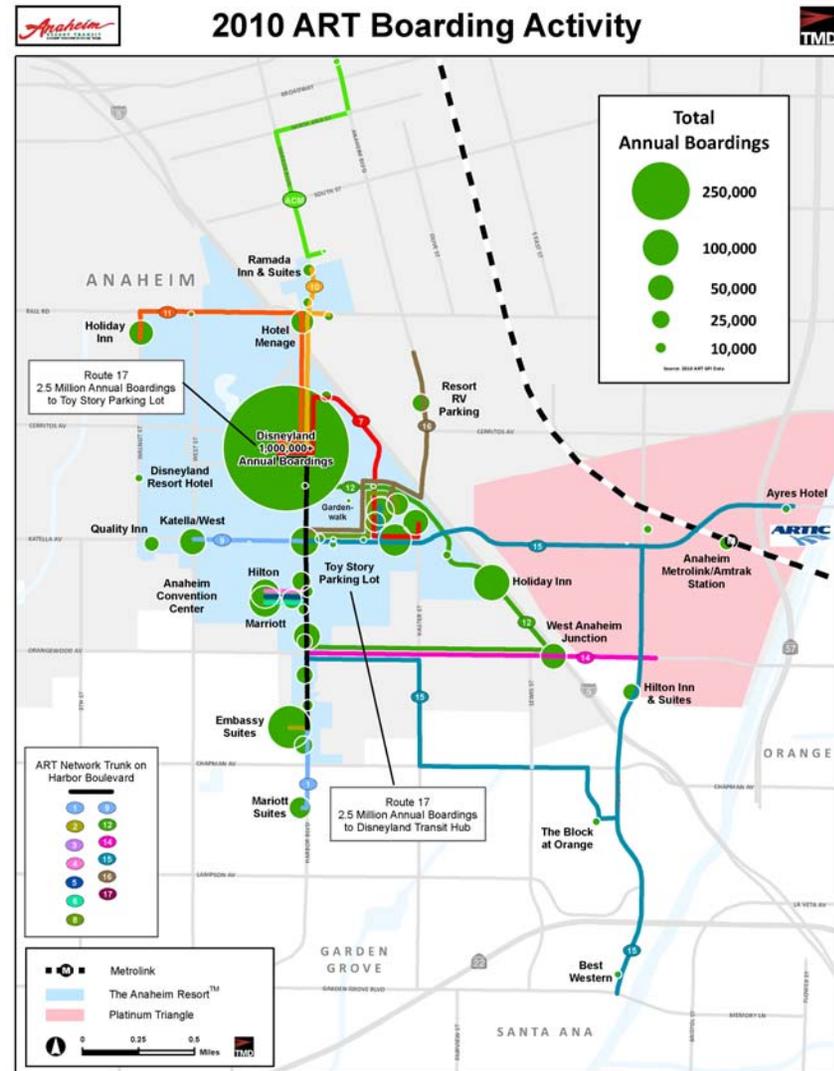
# ART Ridership

	FY 2010	FY 2011	% Change
<b>Ridership</b>			
<b>Total</b>	<b>4,131,028</b>	<b>7,655,388</b>	<b>85%</b>
<b>Revenue Miles</b>			
<b>Total</b>	<b>844,738</b>	<b>1,018,466</b>	<b>21%</b>

Route 17 accounted for a significant increase in annual ridership from FY 2010 to FY 2011

Route 17 began operating in March 2010

Data Source: ART TransTrack Monthly Agency Summarized Database



Source: GFI Transaction Data (2010)

# Comparable Systems

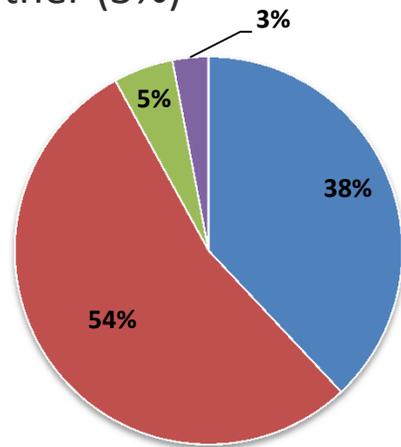
System	Ridership	Revenue Miles	Operating Expenses	Fleet Size
ART (FY11 TransTrack)	7.7M	1.0M	10.8M	65
ART (FY10 NTD)	4.1M	0.8M	7.4M	70
Laguna Beach Transit	0.6M	0.2M	1.9M	23
Monterey-Salinas	4.2M	3.8M	23.5M	83
SolTrans	1.5M	2.0M	9.9M	60
SunLine	3.6M	2.5M	17.4M	68

Data Source: 2010 NTD Database and ART FY11 (TransTrack Database)

# Financial - Operating

- FY 2011 Revenue (\$11.6 M)

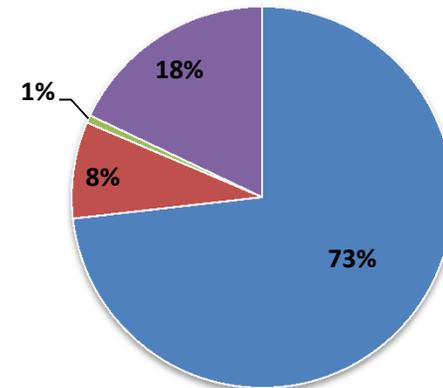
- Ticket Sales (38%)
- Assessment Fees (54%)
  - Hotels (17%)
  - Retail (2%)
  - Route 17 (35%)
- Advertising (5%)
- Other (3%)



■ Ticket Sales ■ Assessment Fees ■ Advertising ■ Other

- FY 2011 Expenses (\$10.8M)

- Vehicle Ops: (73%)
- Vehicle Maintenance: (8%)
- Non-Vehicle Maintenance: (1%)
- General Admin: (18%)



■ Vehicle Ops ■ Vehicle Maintenance  
■ Non-Vehicle Maintenance ■ General Admin

# Financial – Capital

- Fleet
  - Recent expansion to 65 buses using borrowed buses from OCTA
  - New buses on order based on a one time grant
    - 10 replacement buses
    - 10 expansion buses
- Facilities
  - Current facility leased; facility status change requires move or purchase
  - Part of fleet maintained at OCTA facility
- Technology
  - Limited ability to invest in needed technology

# Stakeholder Interviews

- City of Anaheim
- Los Angeles Angels of Anaheim
- Honda Center
- UCI Medical
- Orange County Diocese
- Chamber of Commerce
- City National Grove
- Real Estate/ Developers
- Visitor and Convention Bureau
- Disney
- Garden Walk

*In addition, a presentation was given to the Anaheim South District Neighborhood Association at their January meeting.*

# Why Consider Governance Options?

- Affects growth alternatives and determines areas served
- Keep pace with area and economic development
- Relates to funding
- Responds to stakeholder input

# Growth & Areas Served

- Governance affects ART's flexibility to expand service both internally within the area and outside
  - Frequency improvements
  - New service within the area
  - New service outside the area

# Keep Pace with Development

- Major private investments geared to enhanced land-use and economic growth vs. parking
- Major capital investments programs for ARTIC and ARC
- Position and respond to future economic development and ability to meet transportation needs of the Anaheim Resort and Platinum Triangle

# Funding

- Ability to improve and maintain ART as a transportation service of choice
- Current ART funding limitations:
  - Operating funds currently available for existing operation, but not expansion and/or capital investment
  - Limited access to capital funds, both local match and federal/state:
    - Fleet replacement
    - Facility enhancement and/or expansion
    - Technology improvements and upgrades

# Stakeholder Input

- Four major themes identified:
  - Continue to focus and build market
  - Focus on the customer
  - Operate a service that is simple, accessible, and easy to use
  - Develop reliable long term funding sources

# Current Governance Structure

- 501(C4) non-profit organized for the purpose of providing visitor-oriented transportation services in the City of Anaheim
- Governed by Board of Directors, Articles of Incorporation and Bylaws
- Currently operates almost exclusively in the City of Anaheim
- Under PUC, 98% of the ATN's annual vehicle mile trips must be provided within the City of Anaheim

# Question

- What organizational structure options exist to support the growth and development of ATN to facilitate future access to public funding sources?

# Governance Options

1. Maintain existing ATN corporate structure with potential organizational changes
2. Formation of related public entity to work in conjunction with existing corporate structure, which would result in the ability to access additional funding sources

# Governance Options

1. Maintain existing ATN corporate structure with potential organizational changes to facilitate service expansion
  - Changes would include revisions to Bylaws, Articles of Incorporation and potential director/membership revisions
  - Would likely require CPUC certificate to operate if new service was provided outside the City of Anaheim
  - Changes would likely not increase funding opportunities but would facilitate service expansion

# Governance Options

2. Formation of related public entity to work in conjunction with existing corporate structure.
  - Formation of new joint powers authority (JPA) to act as a related entity to the ATN
  - Legislatively created special purpose entity
  - May result in access additional funding sources
  - Broader public agency involvement and support
  - Would require changes to ATN corporate documents and CPUC certificate if service outside the City of Anaheim was provided

# Next Steps

- Develop recommended governance option consistent with planned economic development, infrastructure investments, and identified service needs

# QUESTIONS OR COMMENTS?

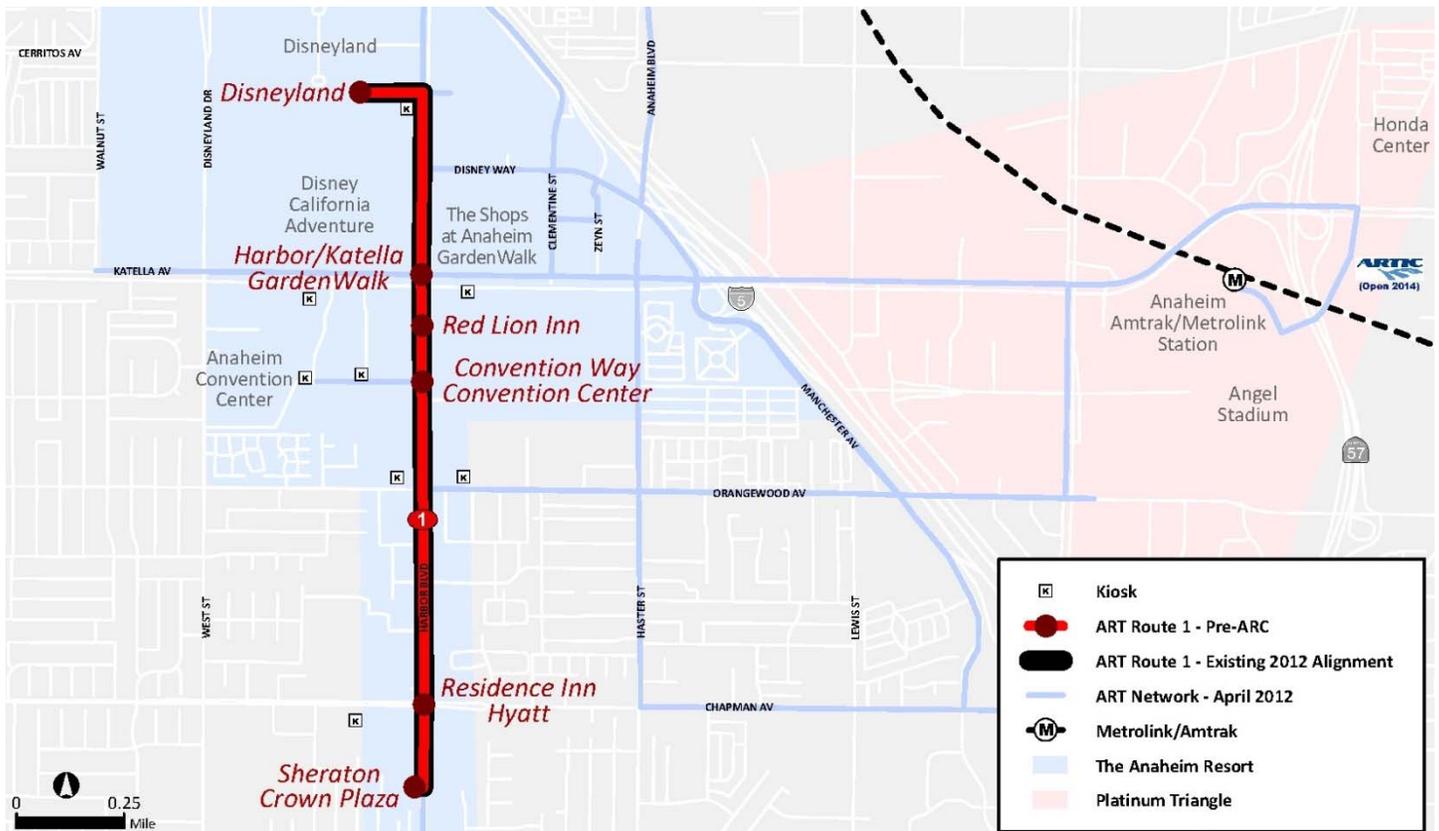






## Appendix D: Pre-ARC Route Profiles

# Route 1 (Pre-ARC)



## Frequency and Span of Service

	Existing	Pre-ARC
Frequency (minutes)	20	20
Span	Varies with park hours and special events	

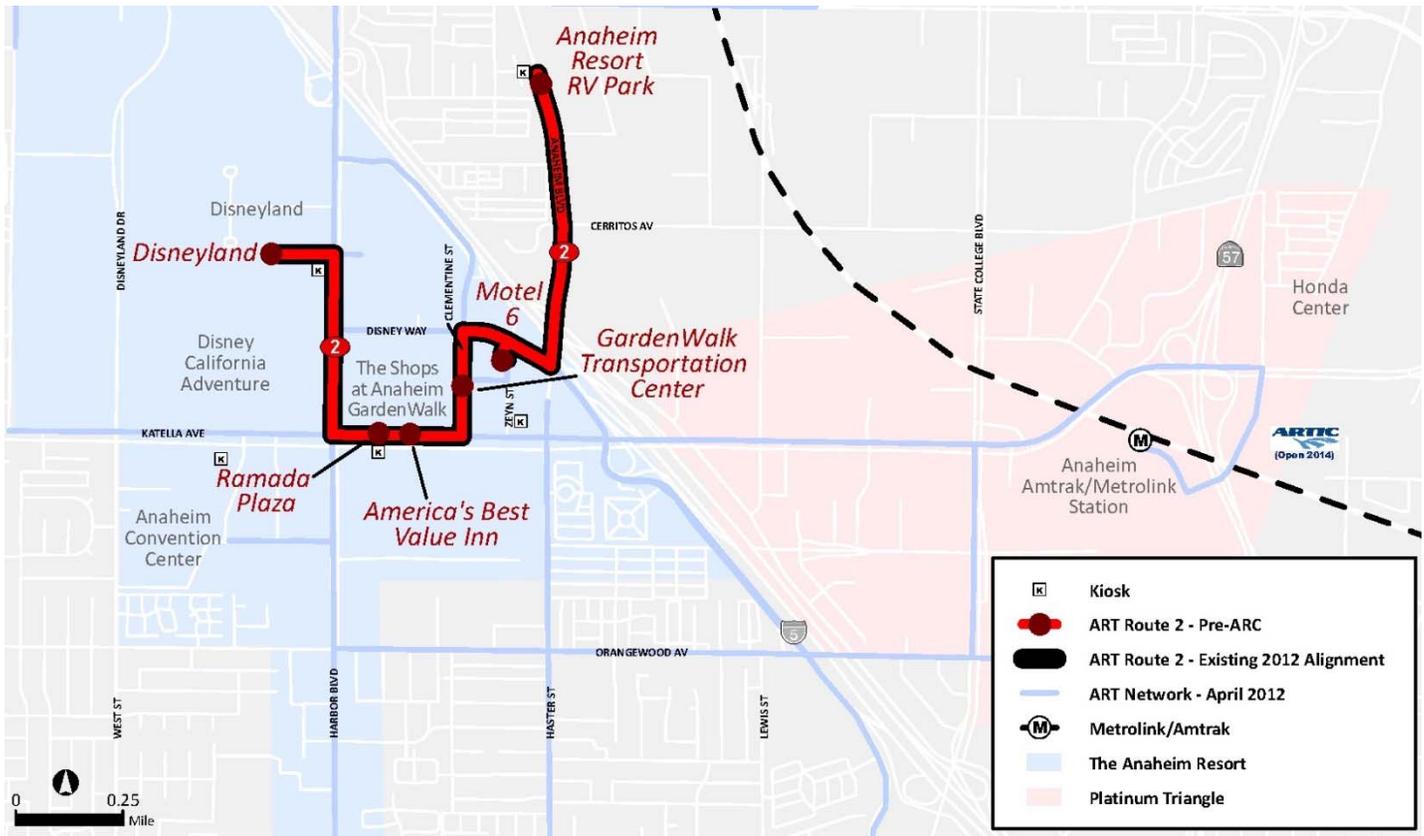
## Destinations Served

Disneyland® Resort, The Shops at GardenWalk, Red Lion Hotel, Anaheim Convention Center, Residence Inn, Hyatt, Sheraton, Crown Plaza

## Pre-ARC Service Description

As of February 2012 Route 1 no longer serves Marriot Suites on South Harbor Boulevard in Garden Grove. When the Anaheim Convention Center Grand Plaza project is complete in 2013, Route 6 will be eliminated. The Red Lion Hotel will be served by Route 1. Route 1 will also continue to serve other hotels along the existing alignment including Residence Inn, Hyatt, Sheraton, and Crown Plaza.

# Route 2 (Pre-ARC)



## Frequency and Span of Service

	Existing	Pre-ARC
Frequency (minutes)	20	20
Span	Varies with park hours and special events	

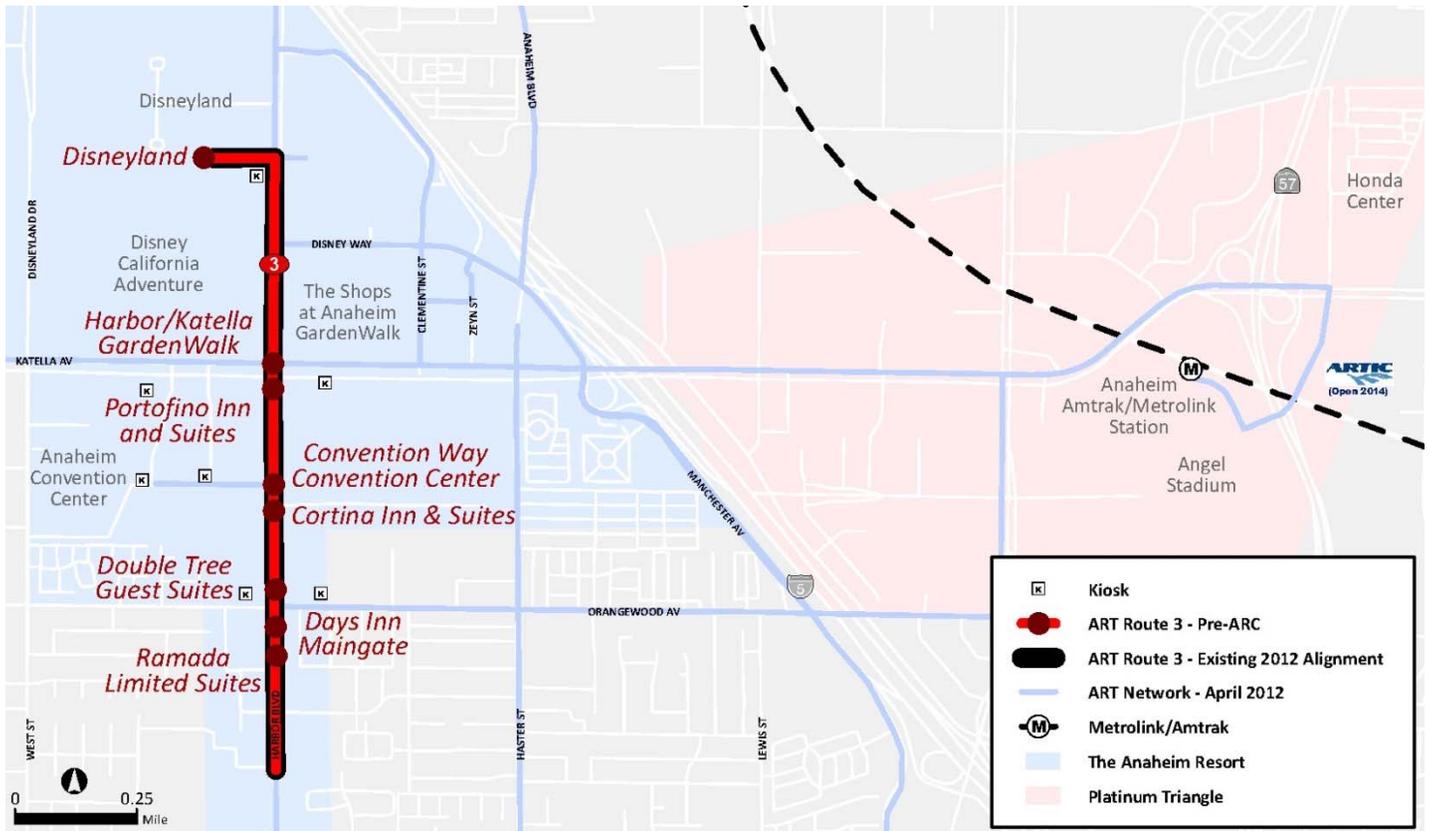
## Destinations Served

Disneyland® Resort, The Shops at GardenWalk, Anaheim Resort RV Park, Motel 6, America's Best Value Inn, Ramada Plaza

## Pre-ARC Service Description

Route 2 currently operates the alignment previously assigned to Route 16. The Pre-ARC alignment will remain unchanged and will continue to serve the Anaheim Resort RV Park along with several other lower ridership hotels along Clementine Street and Katella Avenue.

# Route 3 (Pre-ARC)



- Kiosk
- ART Route 3 - Pre-ARC
- ART Route 3 - Existing 2012 Alignment
- ART Network - April 2012
- Metrolink/Amtrak
- The Anaheim Resort
- Platinum Triangle

## Frequency and Span of Service

	Existing	Pre-ARC
Frequency (minutes)	20	20
Span	Varies with park hours and special events	

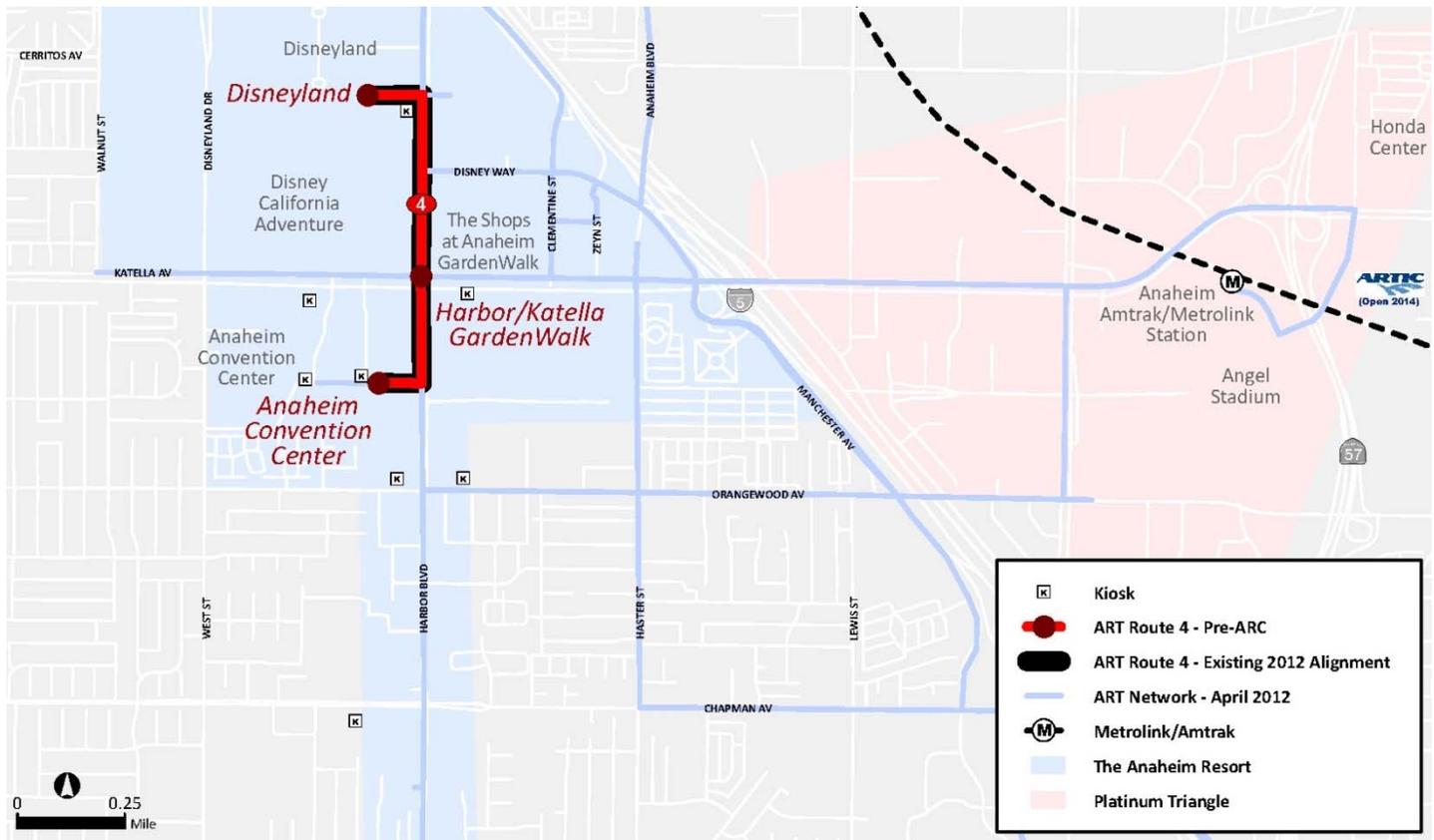
## Destinations Served

Disneyland® Resort, The Shops at GardenWalk, Portofino Inn and Suites, DoubleTree Guest Suites, Days Inn Maingate, Cortona Inn and Suites, Ramada Limited Suites

## Pre-ARC Service Description

Route 3 will continue to serve hotels along the existing alignment including Portofino Inn and Suites, DoubleTree Guest Suites, Days Inn Maingate, Cortona Inn and Suites, and Ramada Limited Suites.

# Route 4 (Pre-ARC)



## Frequency and Span of Service

	Existing	Pre-ARC
Frequency (minutes)	20	10
Span	Varies with park hours and special events	

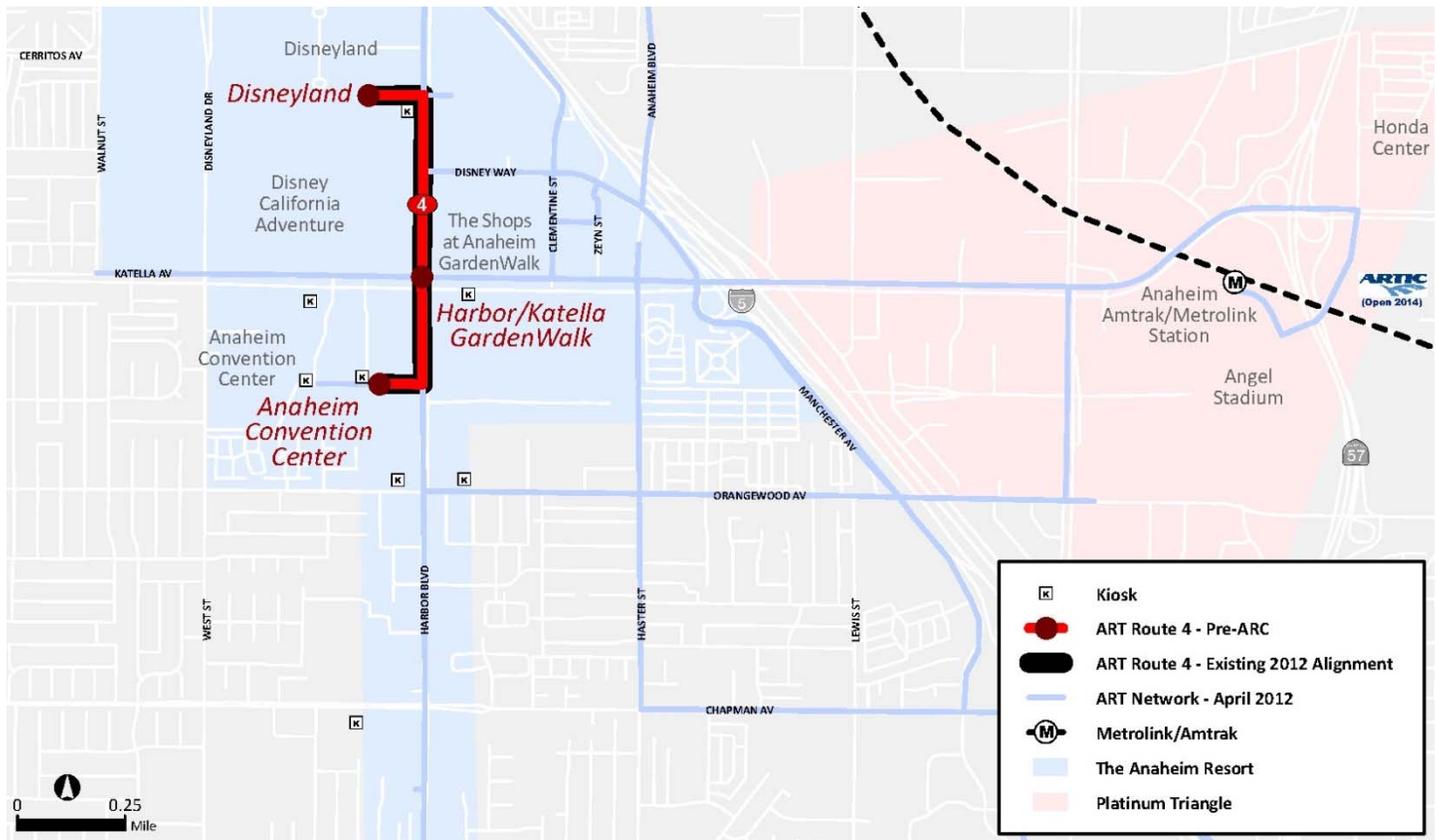
## Destinations Served

Disneyland® Resort, The Shops at GardenWalk, Anaheim Convention Center, Hilton, Marriott, Courtyard Anaheim, Sheraton Park, Clarion Hotel

## Post-ARC Service Description

Routes 4, 5, and 6 currently all provide service between the Disneyland Main Transportation Center and Convention Way every 20 minutes. The Anaheim Convention Center Grand Plaza project is expected to be complete by 2013. The project will turn part of Convention Way into a pedestrian plaza, changing access to Hilton and Marriott. A new Grand Plaza bus stop will be constructed as part of the project. This will allow for a common pick up point for ART to serve its customers. Therefore the proposed plan is to combine Routes 4, 5 and 6 into one route, Route 4, operating at a 10 minute frequency. Guests from all hotels previously served by Routes 4, 5, and 6 will now access Disneyland via Route 4 from the Grand Plaza bus stop.

# Route 5 & 6 (Pre-ARC)



## Frequency and Span of Service

	Existing	Pre-ARC
Frequency (minutes)	20	Eliminate
Span	Varies with park hours and special events	

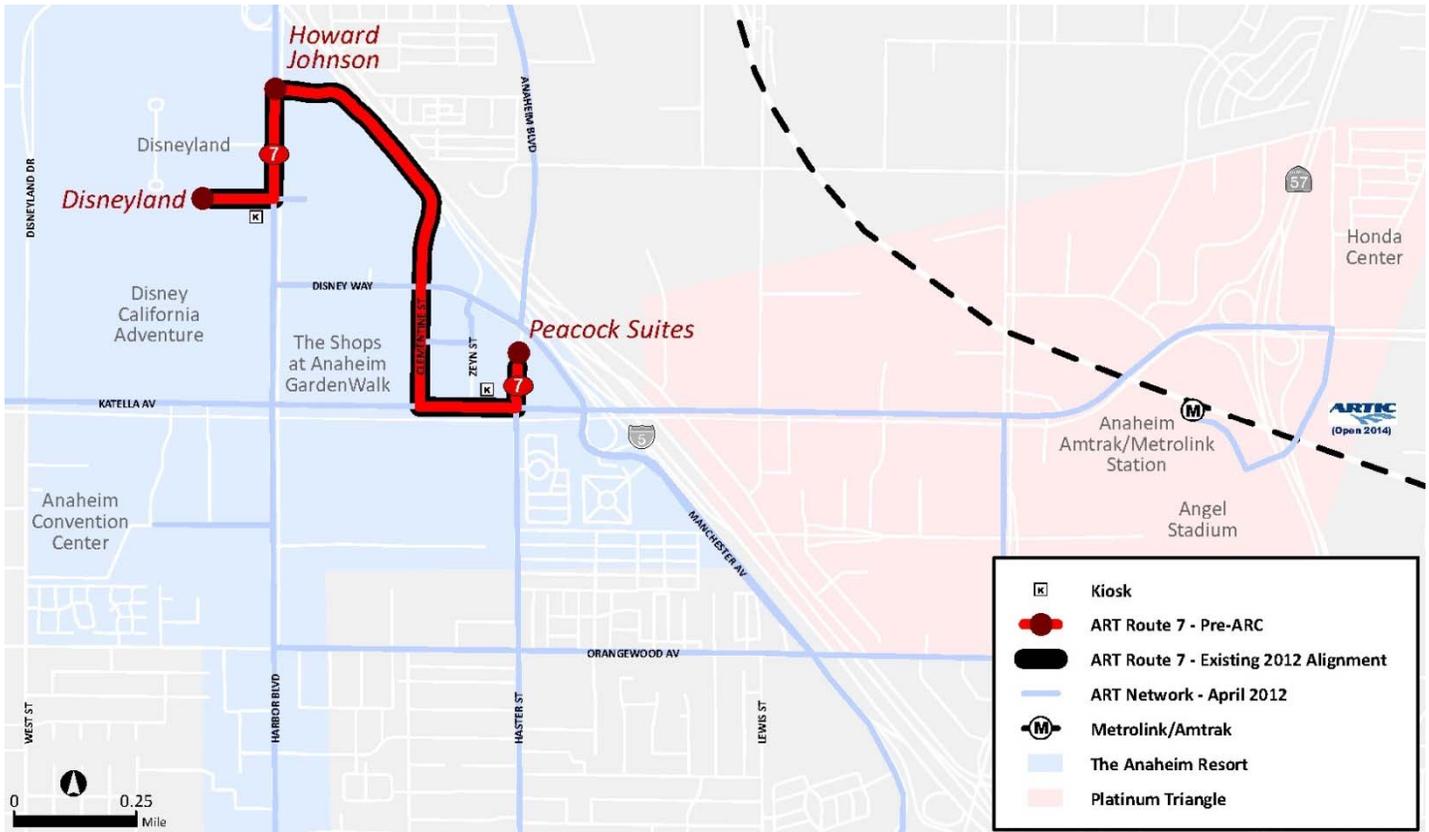
## Destinations Served

Service eliminated; Route 4 will provide service to Disneyland® Resort, The Shops at GardenWalk, Anaheim Convention Center, Hilton, Marriott, Courtyard Anaheim, Sheraton Park, Clarion Hotel

## Post-ARC Service Description

Routes 4, 5, and 6 currently all provide service between the Disneyland Main Transportation Center and Convention Way every 20 minutes. The Anaheim Convention Center Grand Plaza project is expected to be complete by 2013. The project will turn part of Convention Way into a pedestrian plaza, changing access to Hilton and Marriott. A new Grand Plaza bus stop will be constructed as part of the project. This will allow for a common pick up point for ART to serve its customers. Therefore the proposed plan is to combine Routes 4, 5 and 6 into one route, Route 4, operating at a 10 minute frequency. Guests from all hotels previously served by Routes 4, 5, and 6 will now access Disneyland via Route 4 from the Grand Plaza bus stop.

# Route 7 (Pre-ARC)



## Frequency and Span of Service

	<u>Existing</u>	<u>Pre-ARC</u>
Frequency (minutes)	20	20
Span	Varies with park hours and special events	

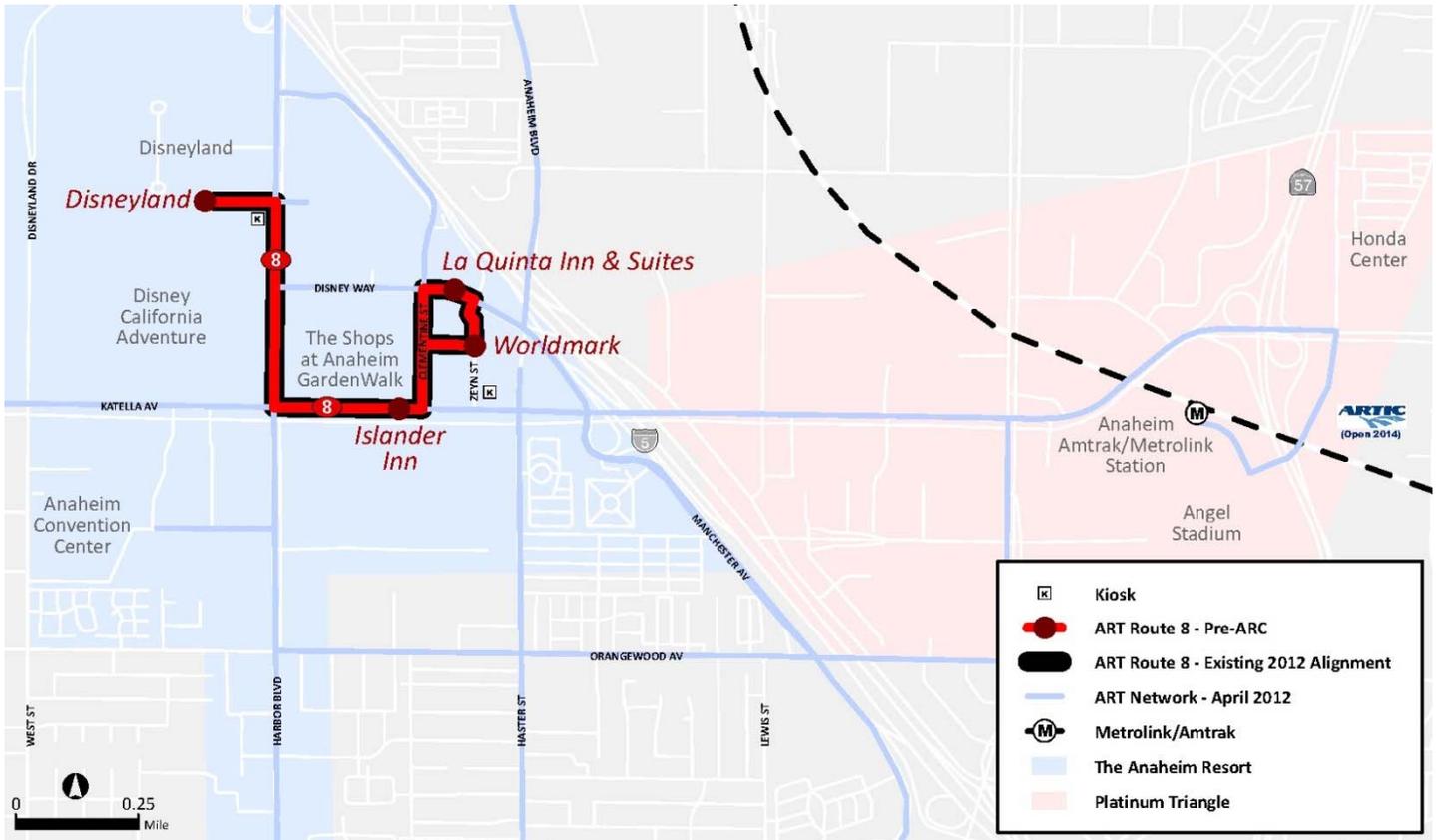
## Destinations Served

Disneyland® Resort, Howard Johnson, Residence Inn, Peacock Suites, Greenwood Suites Anaheim Resort

## Pre-ARC Service Description

Route 7's alignment will remain unchanged and will continue to serve to Disneyland Resort, Howard Johnson, Residence Inn, and Peacock Suites via Harbor Boulevard, Manchester Avenue, Clementine Street, Katella Avenue, and South Anaheim Boulevard.

# Route 8 (Pre-ARC)



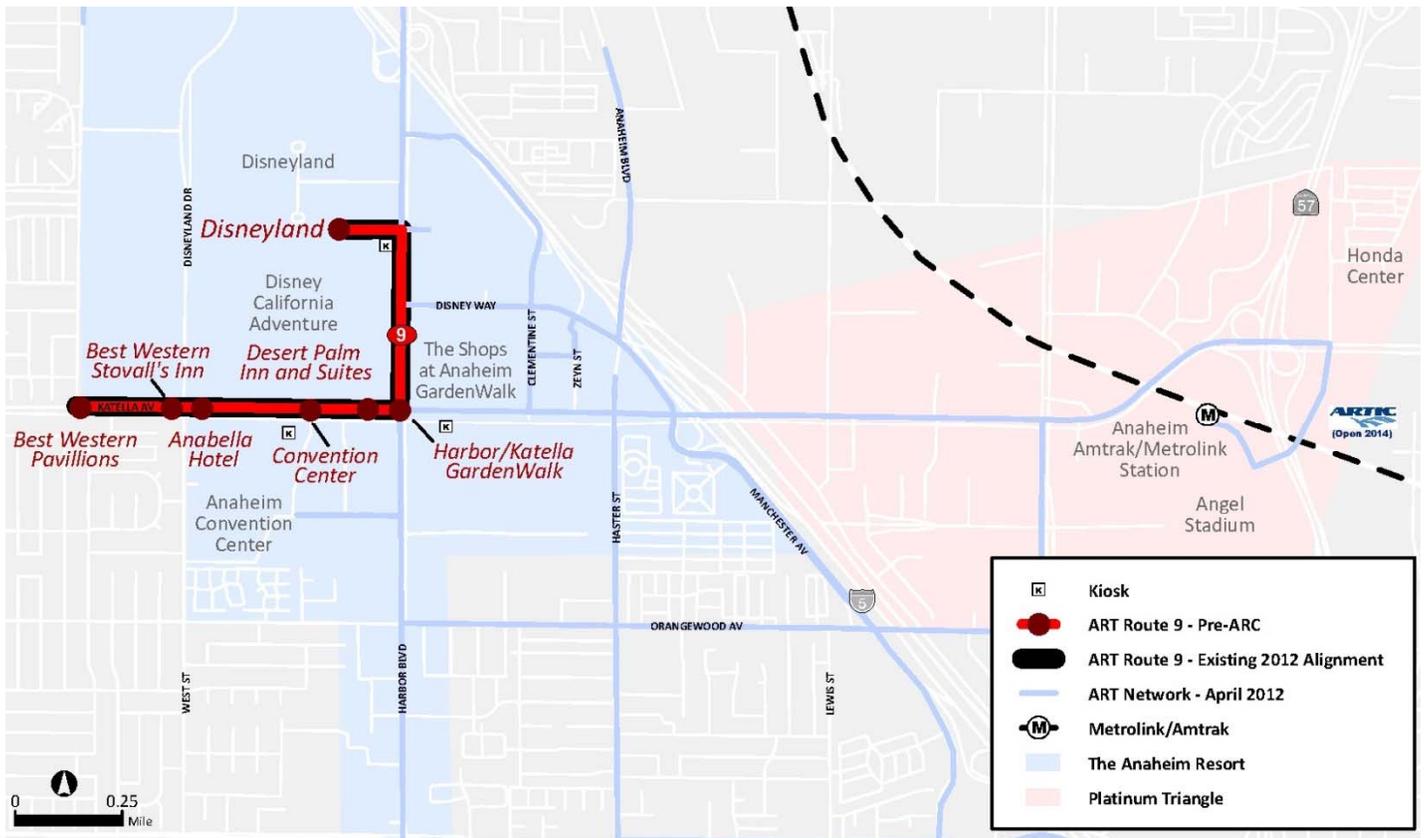
Frequency and Span of Service		
	Existing	Pre-ARC
Frequency (minutes)	20	20
Span	Varies with park hours and special events	

**Destinations Served**  
 Disneyland® Resort, Islander Inn, La Quinta Inn & Suites, Extended Stay America , Worldmark, Garden Walk

**Pre-ARC Service Description**

Route 8’s alignment will remain unchanged and will continue to serve to Disneyland Resort, Islander Inn, La Quinta Inn & Suites, and Worldmark via Harbor Boulevard, Katella Avenue, Clementine Street, Disney Way, and Zeyn Street.

# Route 9 (Pre-ARC)



## Frequency and Span of Service

	Existing	Pre-ARC
Frequency (minutes)	20	20
Span	Varies with park hours and special events	

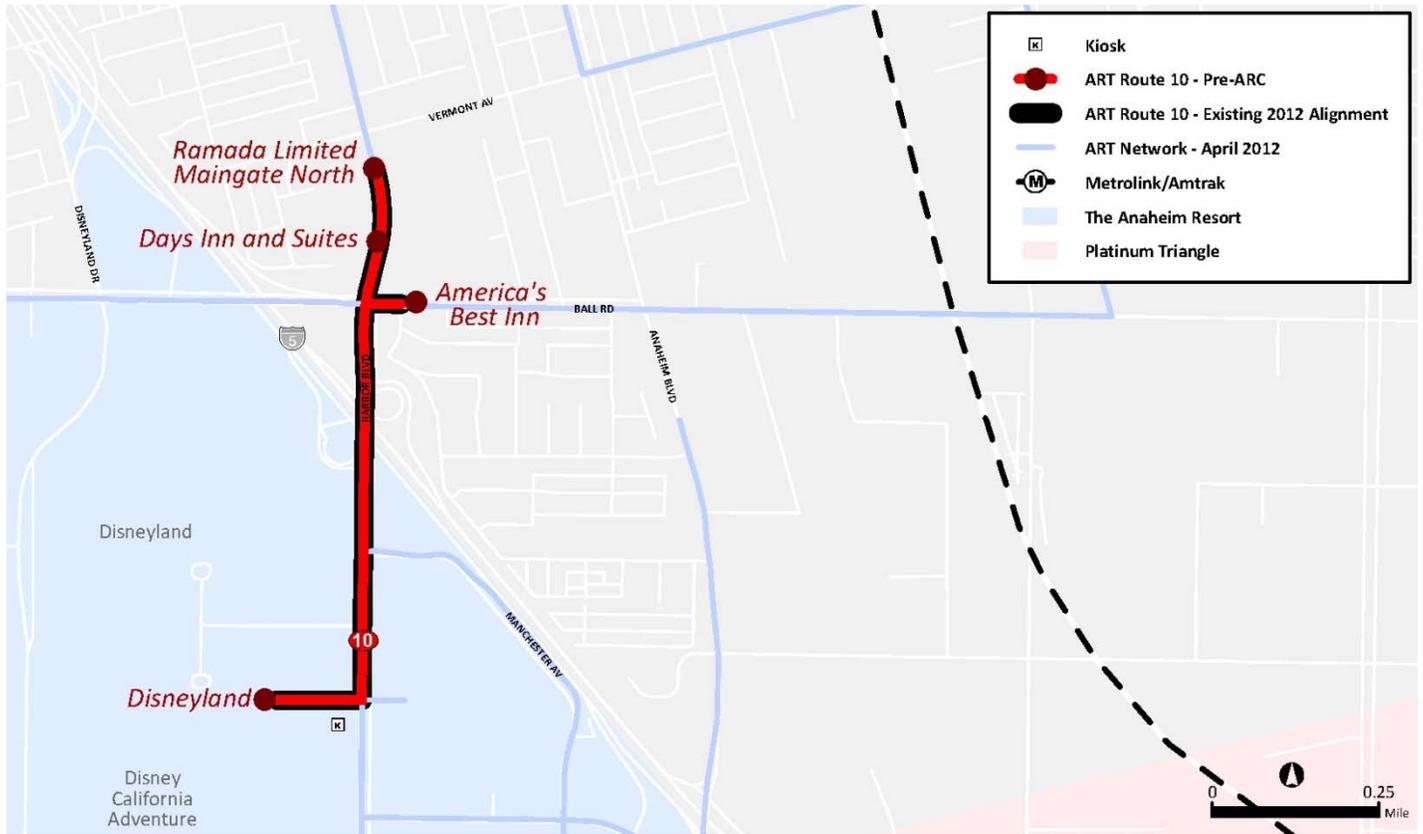
## Destinations Served

Disneyland® Resort, The Shops at GardenWalk, Anaheim Convention Center, Desert Palm Inn and Suites, Anabella Hotel, Best Western Stovall's Inn, Best Western Pavillions

## Pre-ARC Service Description

Route 9 will continue to provide coverage to those hotels west on Katella Avenue, including Desert Palm Inn and Suites, Anabella Hotel, Best Western Stovall's Inn, and Best Western Pavillions.

# Route 10 (Pre-ARC)



## Frequency and Span of Service

	<u>Existing</u>	<u>Pre-ARC</u>
Frequency (minutes)	20	20
Span	Varies with park hours and special events	

## Destinations Served

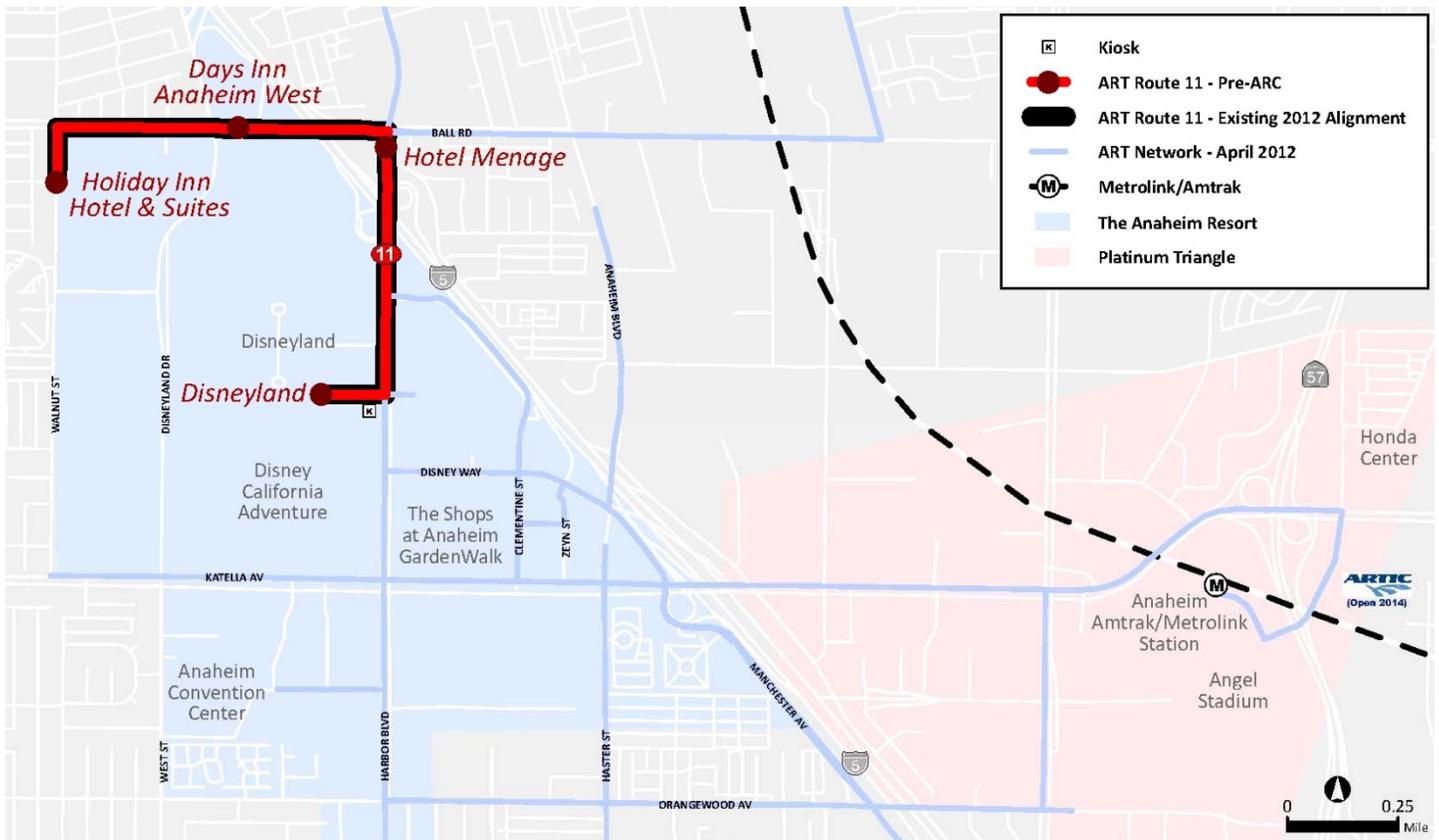
Disneyland® Resort, Ramada Limited Maingate North, Days Inn and Suites, America's Best Inn, Econolodge, and Harbor RV Park

## Pre-ARC Service Description

Route 10 will continue to provide coverage to hotels north on Harbor Boulevard including Ramada Limited Maingate North, Days Inn and Suites, and America's Best Inn.



# Route 11 (Pre-ARC)



## Frequency and Span of Service

	Existing	Pre-ARC
Frequency (minutes)	20	20
Span	Varies with park hours and special events	

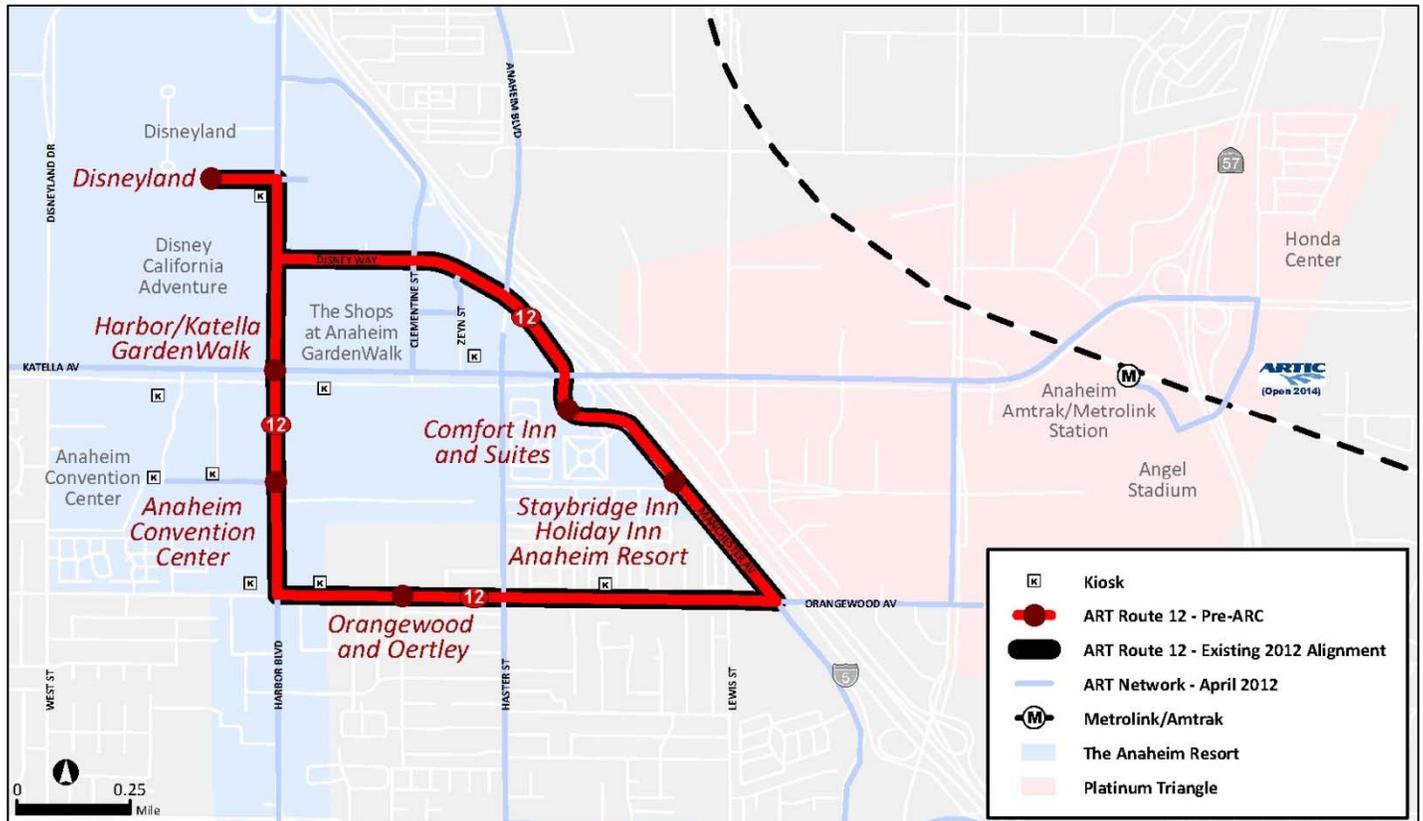
## Destinations Served

Disneyland® Resort, Hotel Menage, Days Inn Anaheim West, Holiday Inn Hotel & Suites

## Pre-ARC Service Description

Route 11 will continue to provide coverage to hotels north on Ball Road and Walnut Street including Menage, Days Inn Anaheim West, and the Holiday Inn Hotel & Suites.

# Route 12 (Pre-ARC)



## Frequency and Span of Service

	Existing	Pre-ARC
Frequency (minutes)	20	20
Span	Varies with park hours and special events	

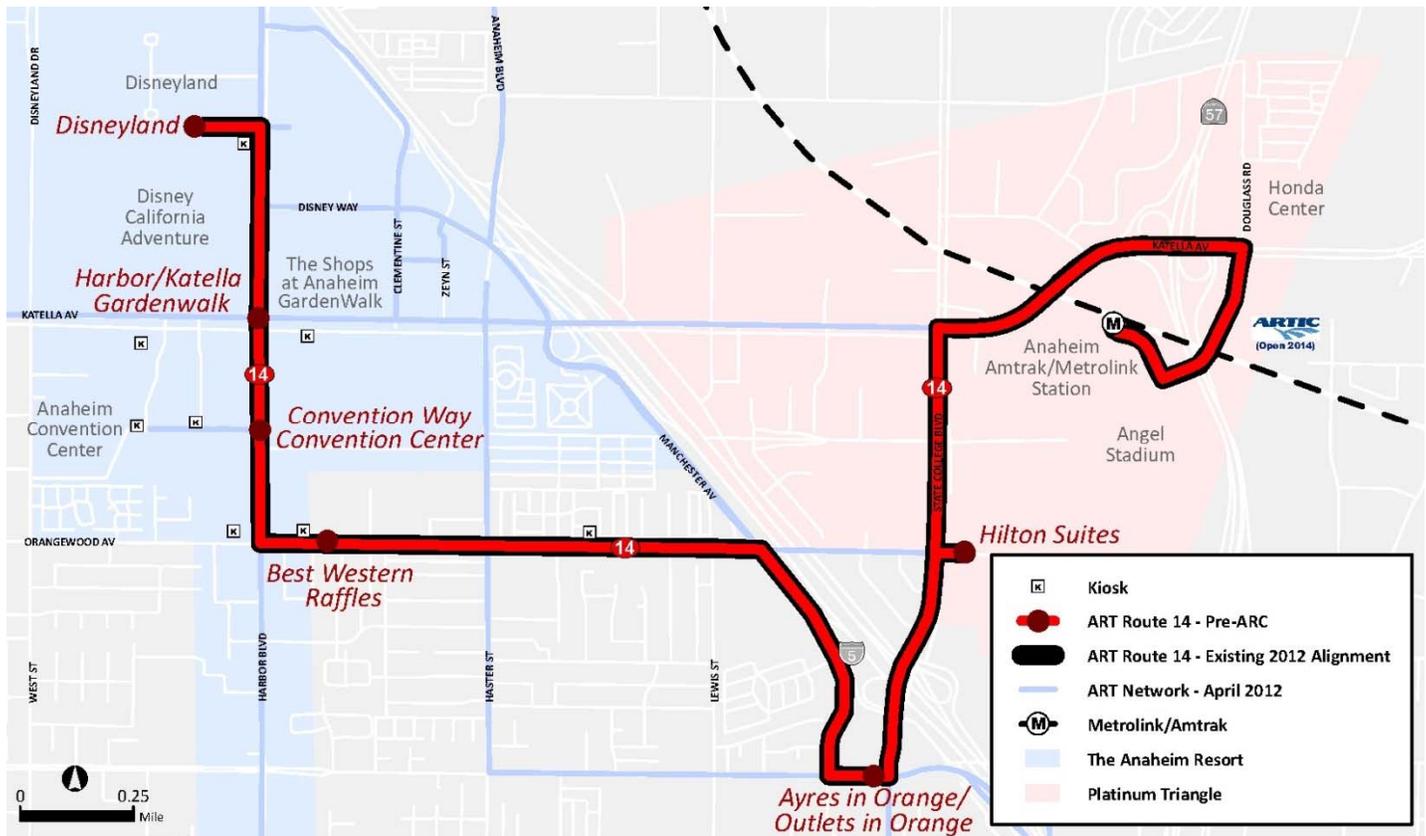
## Destinations Served

Disneyland® Resort, The Shops at GardenWalk, Anaheim Convention Center, Comfort Inn and Suites, Holiday Inn, Staybridge Inn & Suites

## Pre-ARC Service Description

Route 12 will continue to serve Disneyland® Resort, the Anaheim Convention Center, as well as Comfort Inn and Suites and the Holiday Inn on Manchester Avenue.

# Route 14 (Pre-ARC)



## Frequency and Span of Service

	Existing	Pre-ARC
Frequency (minutes)	30	30*
Span	Varies with park hours and special events	

## Destinations Served

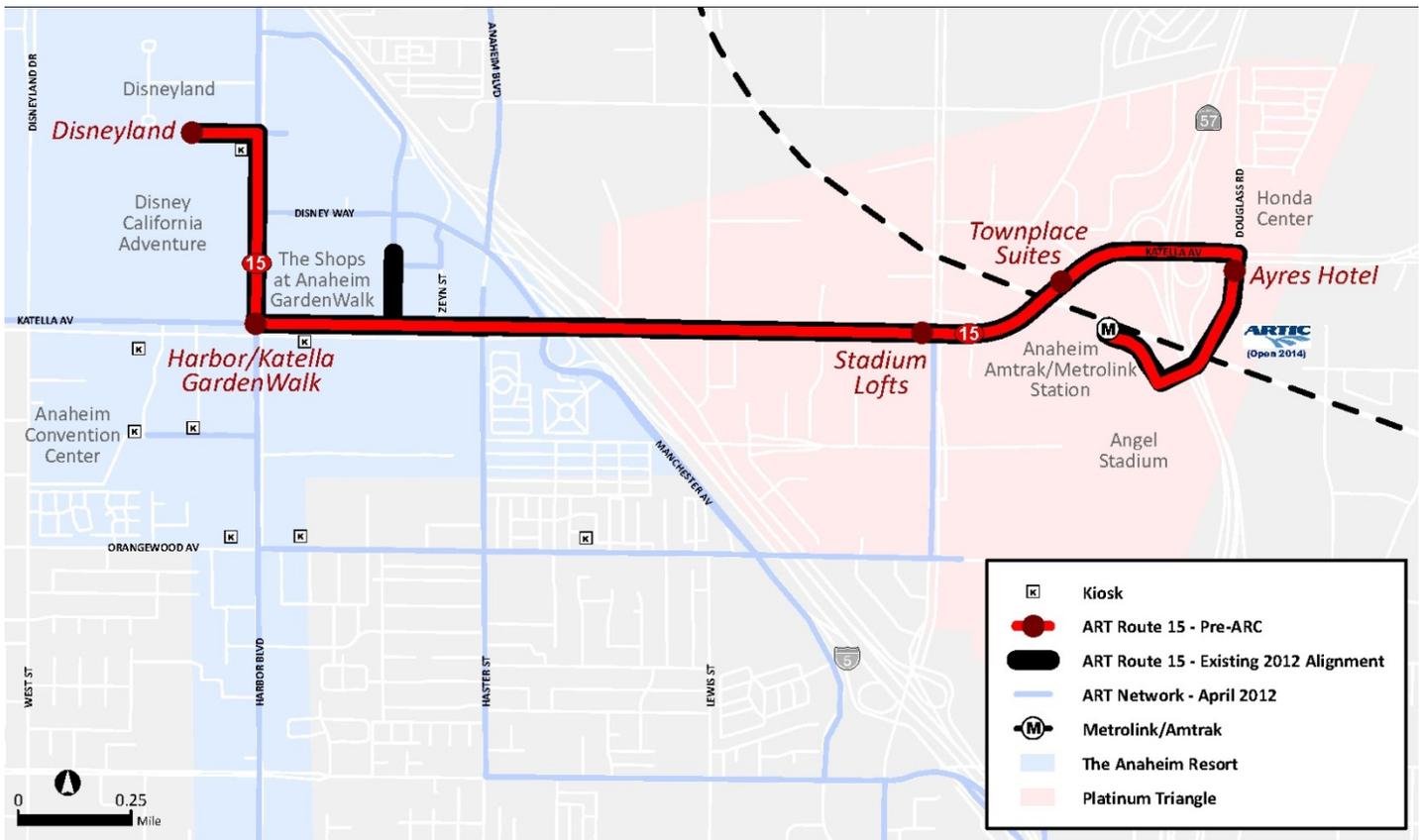
Disneyland® Resort, The Shops at GardenWalk, Anaheim Convention Center, Best Western Raffles, Ayres Hotel, Hilton Suites, Anaheim Amtrak/MetroLink Station ARTIC (future)

## Pre-ARC Service Description

Route 14 was recently extended to the Anaheim Metrolink/Amtrak Station to provide additional ART service for customers accessing The Anaheim Resort by train. This alignment change also coincides with a Disney annual park pass incentive for using the train as a mode of transportation. The route will continue to provide service to the Anaheim Amtrak Station/ARTIC (future) as well as hotels along Orangewood Avenue and Chapman Avenue including Best Western Raffles, Ayres Hotel, and Hilton Suites.

\*Demand at ARTIC should be monitored and frequency adjusted as appropriate between the time ARTIC is complete (2014) and ARC service begins (2018).

# Route 15 (Pre-ARC)



## Frequency and Span of Service

	Existing	Pre-ARC
Frequency (minutes)	60	30*
Span	Varies with park hours and special	

## Destinations Served

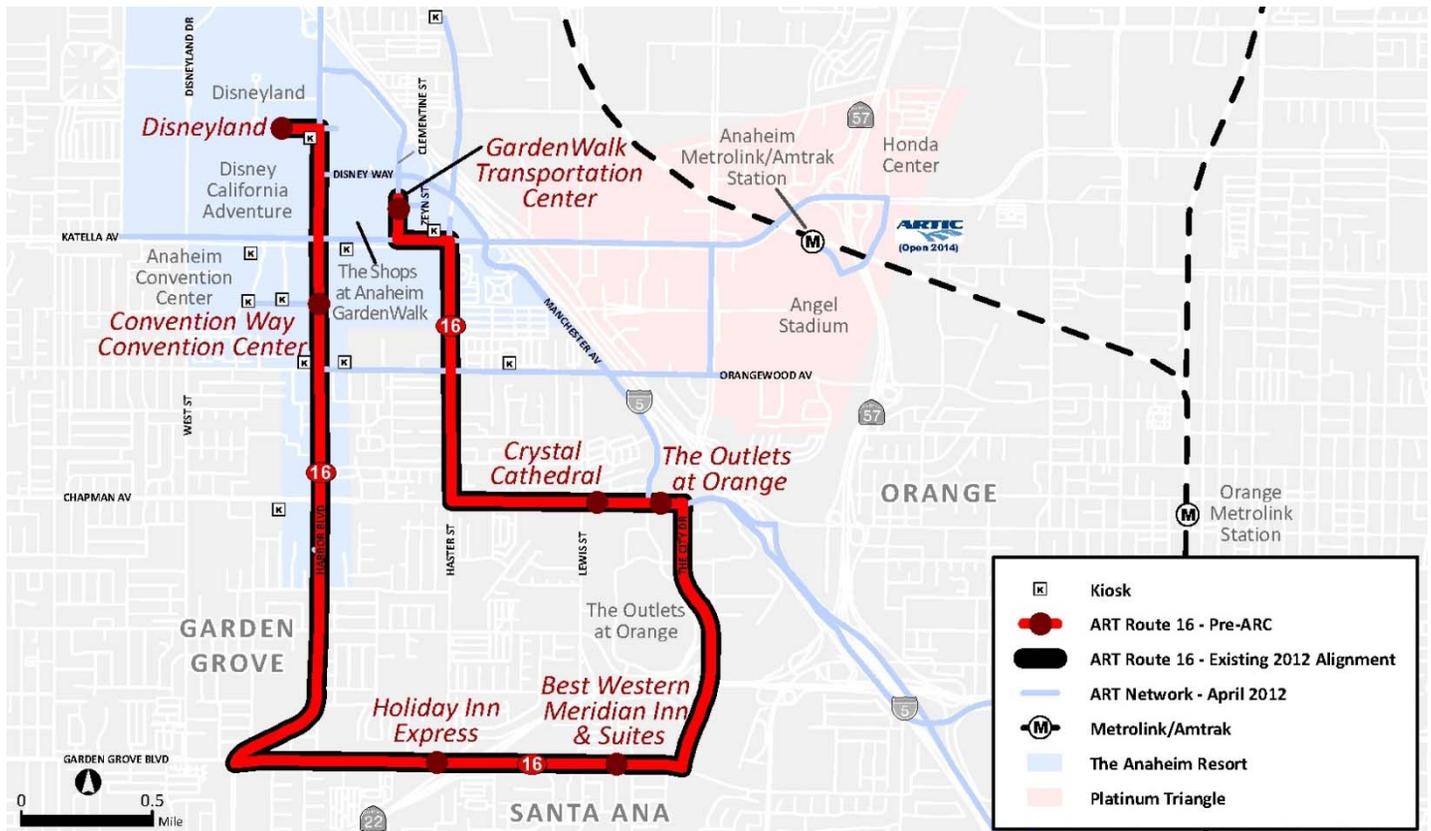
Disneyland® Resort, The Shops at GardenWalk, Stadium Lofts, Ayres Hotel, Townplace Suites, and Anaheim Amtrak/MetroLink Station/ARTIC (future)

## Pre-ARC Service Description

Route 15 was recently restructured to provide direct service from The Anaheim Resort Area to the Anaheim Amtrak Station. This alignment change also coincides with a Disney annual park pass incentive for using the train as a mode of transportation. This route will continue to provide service to Disneyland Resort, The Shops at GardenWalk, Stadium Lofts, Ayres Hotel, Townplace Suites, and Anaheim Amtrak/MetroLink Station/ARTIC (future).

\*Demand at ARTIC should be monitored and frequency adjusted as appropriate between the time ARTIC is complete (2014) and ARC service begins (2018).

# Route 16 (Pre-ARC)



## Frequency and Span of Service

	Existing	Pre-ARC
Frequency (minutes)	60	60
Span	Varies with park hours and special	

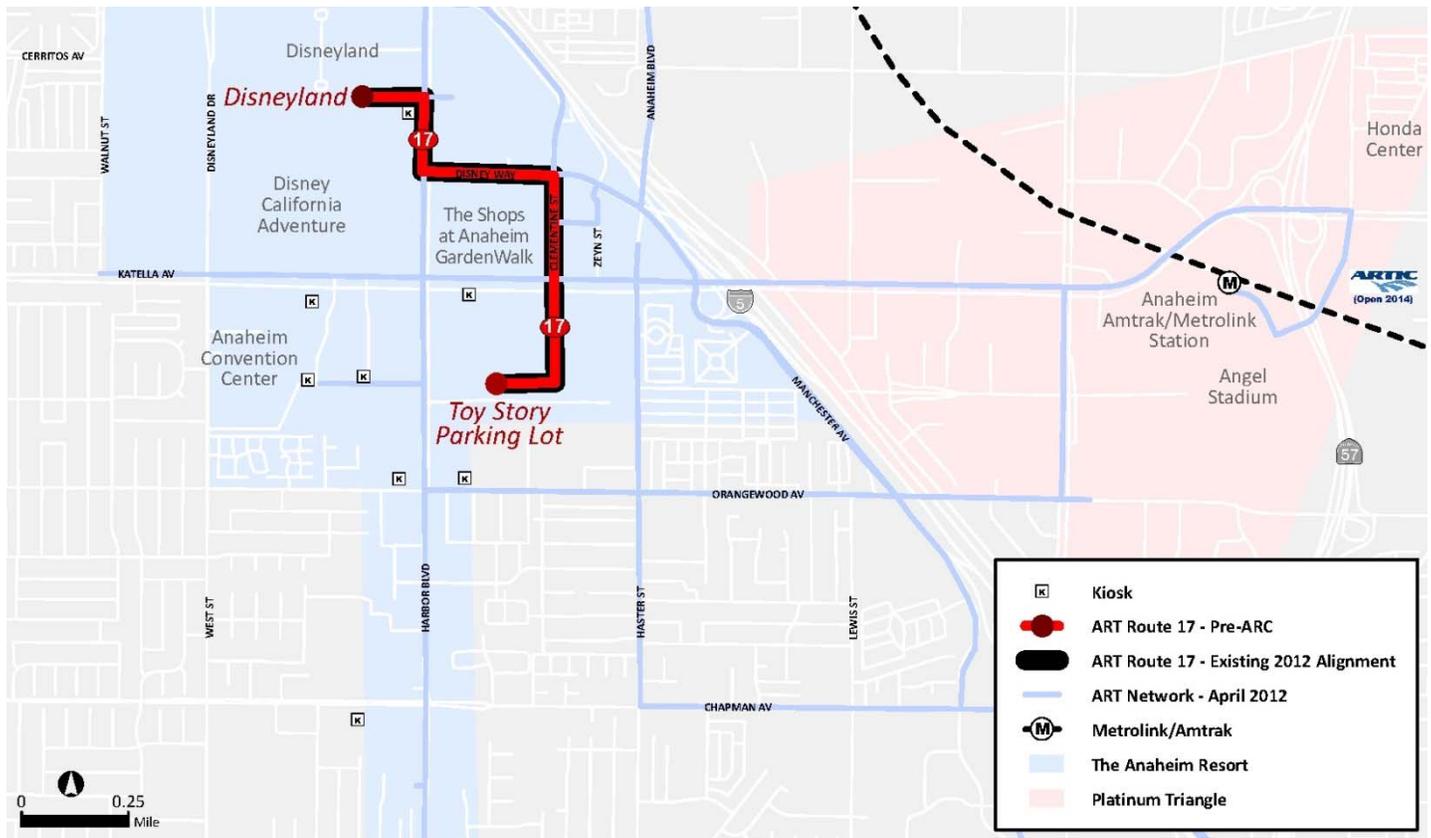
## Destinations Served

Disneyland Resort, The Shops at GardenWalk, Anaheim Convention Center, Crystal Cathedral, The Outlets at Orange, Best Western Meridian Inn & Suites, Holiday Inn Express

## Pre-ARC Service Description

Route 16 recently began operating the southern portion of the old Route 15 every 60 minutes. The route will continue to serve destinations and hotels south of The Anaheim Resort including Crystal Cathedral, The Outlets at Orange, Best Western Meridian Inn & Suites, and Holiday Inn Express.

# Route 17 (Pre-ARC)



## Frequency and Span of Service

	Existing	Pre-ARC
Frequency (minutes)	20	20
Span	Varies with park hours and special	

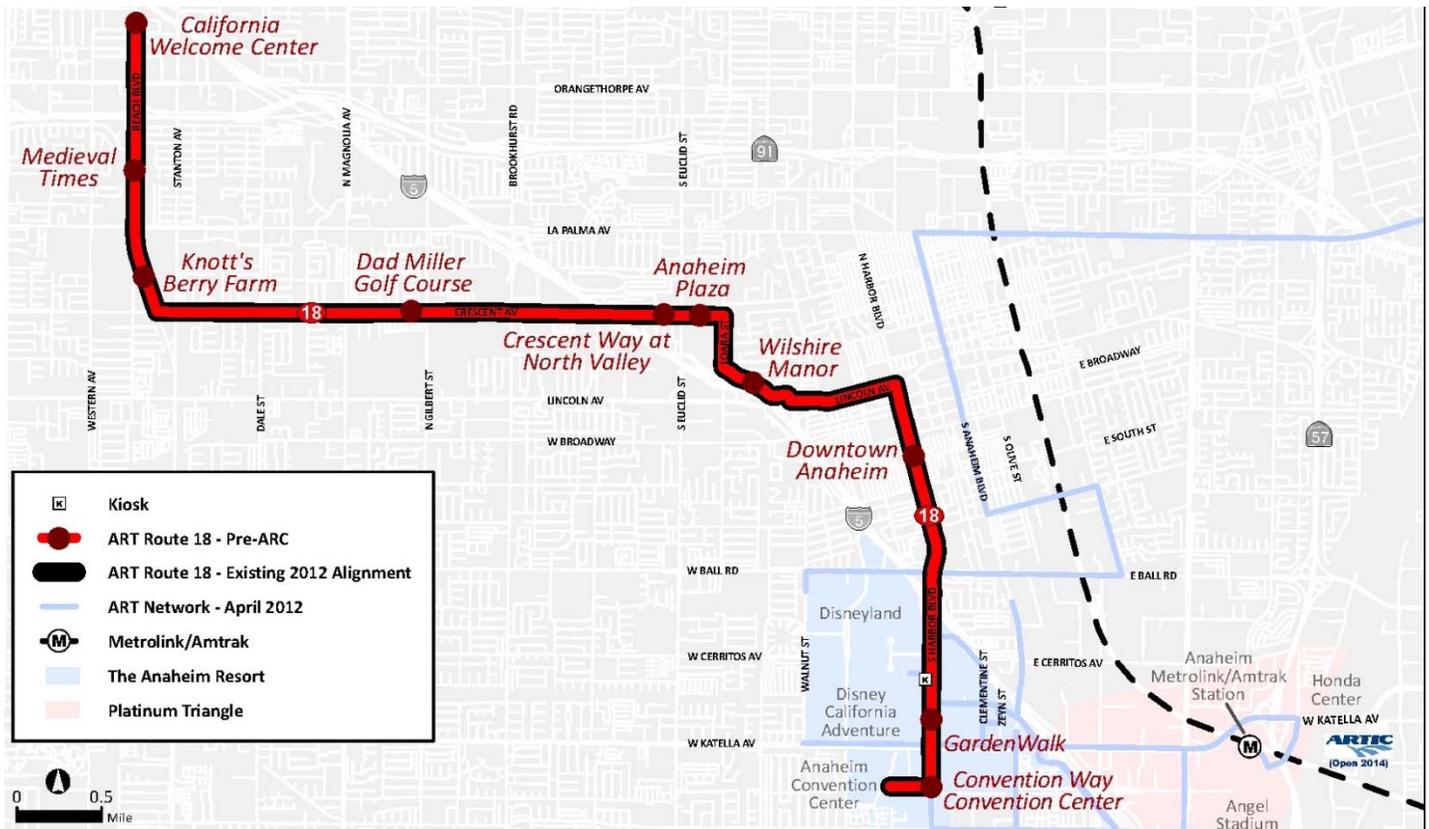
## Destinations Served

Disneyland® Resort, The Shops at GardenWalk, Toy Story Parking Lot

## Pre-ARC Service Description

Route 17 will continue to provide service to the Toy Story Parking Lot, The Shops at GardenWalk, and Disneyland Resort.

# Route 18 (Pre-ARC)



## Frequency and Span of Service

	Existing	Pre-ARC
Frequency (minutes)	60	60
Span	Varies with park hours and special	

## Destinations Served

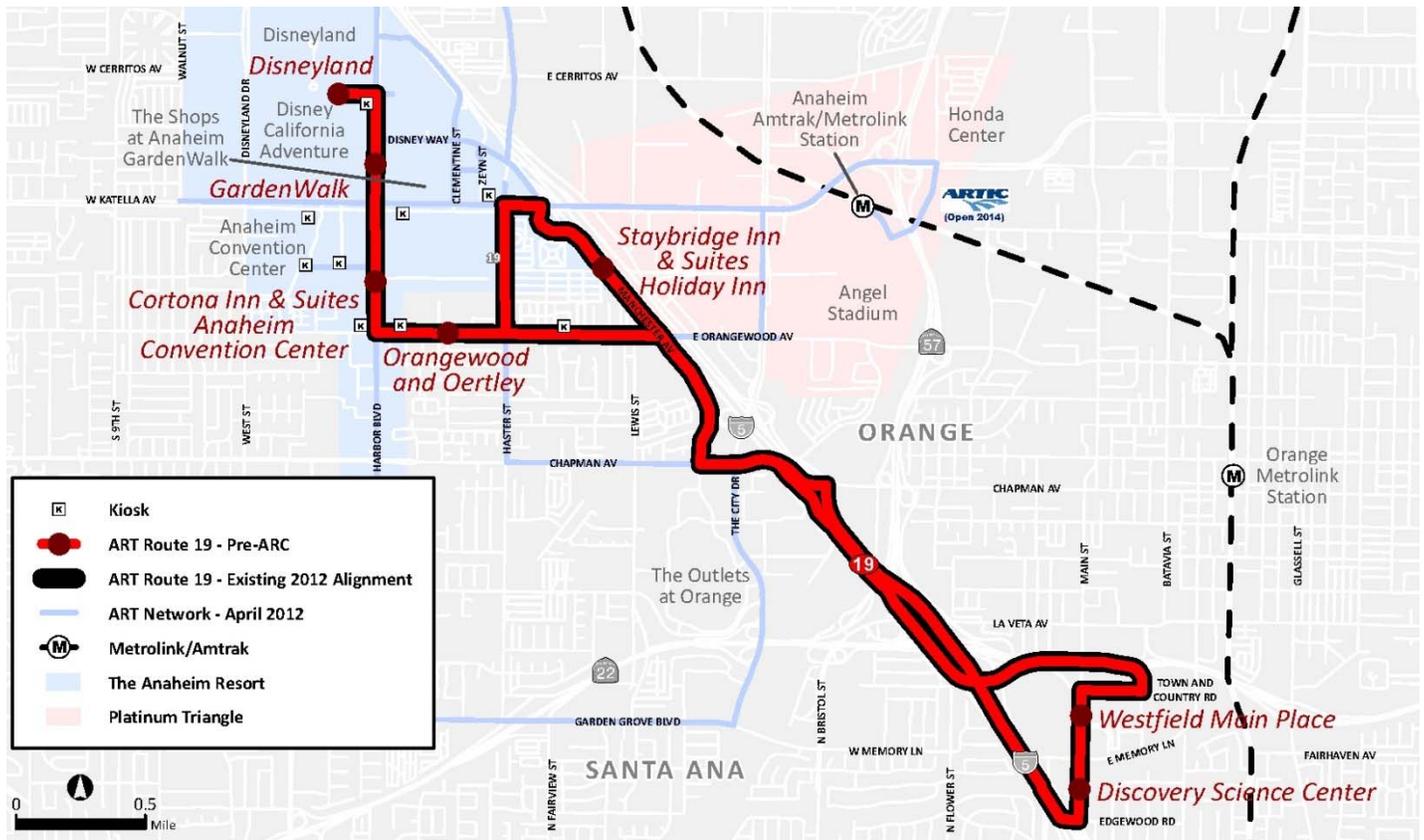
Disneyland® Resort, The Shops at GardenWalk, Anaheim Convention Center, Wilshire Manor, Anaheim Plaza, Crescent at North Valley, Dad Miller Golf Course, Knott's Berry Farm, Medieval Times, CA Welcome Center

## Pre-ARC Service Description

Route 18 began serving Knott's Berry Farm in the Spring of 2012. ART is currently monitoring the performance of this service. As demand warrants service, the route will remain operating along the same alignment.



# Route 19 (Pre-ARC)



## Frequency and Span of Service

	Existing	Pre-ARC
Frequency (minutes)	60	60
Span	Varies with park hours and special	

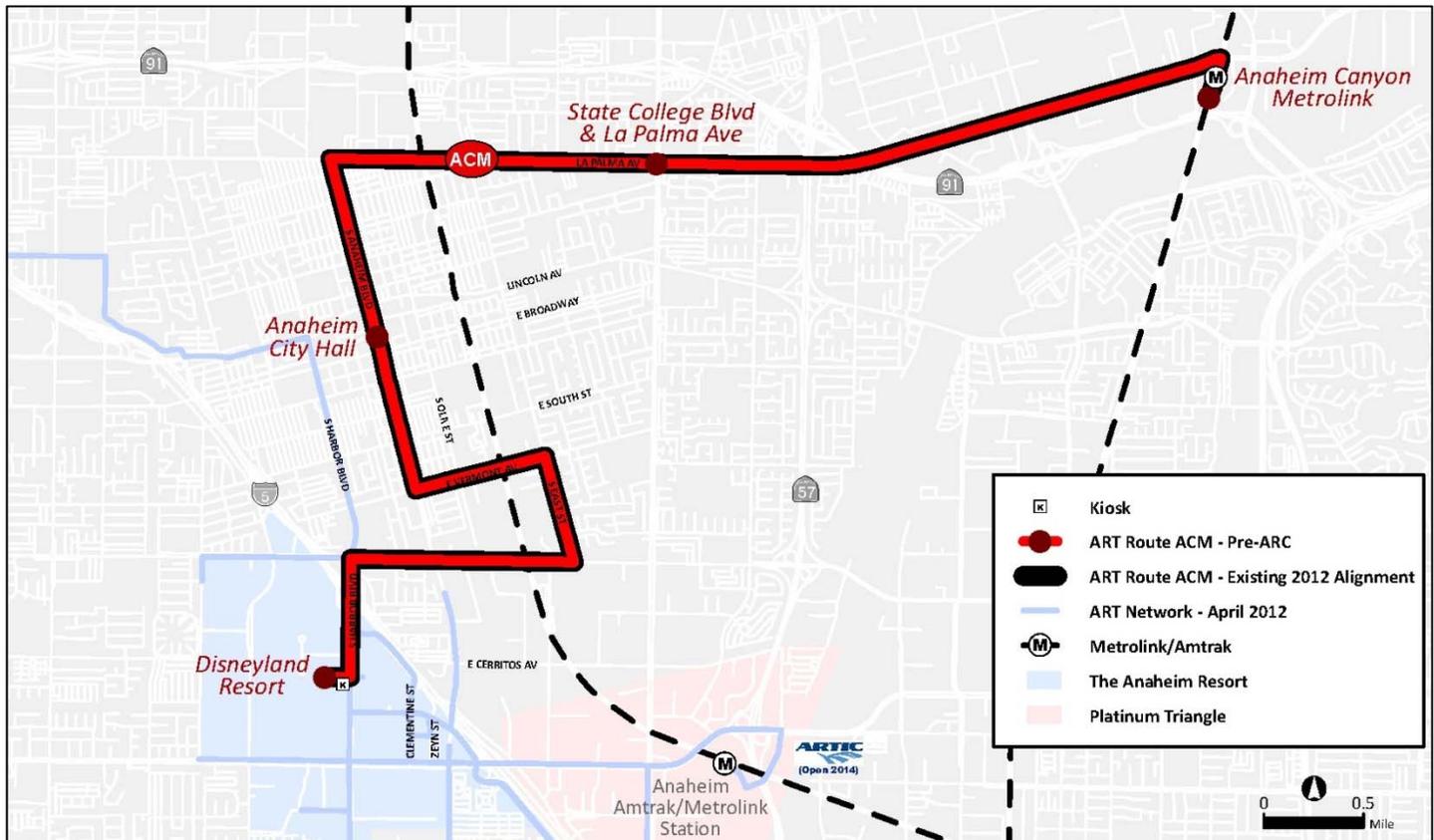
## Destinations Served

Disneyland® Resort, The Shops at GardenWalk, Anaheim Convention Center, Orangewood/Oertley, Staybridge Inn & Suites, Holiday Inn, Westfield Main Place, Discovery Science Center

## Pre-ARC Service Description

Route 19 began serving Westfield Main Place and Discovery Science Center in the Spring of 2012. ART is currently monitoring the performance of this service. As demand warrants the route will remain operating along the same alignment.

# Route ACM (Pre-ARC)



## Frequency of Service

	AM Peak	PM Peak
Existing	4 Trips	3 Trips
Pre-ARC	4 Trips	3 Trips

## Destinations Served

Anaheim Convention Center, Disneyland® Resort, Downtown Anaheim, Anaheim City Hall, Anaheim Canyon Metrolink

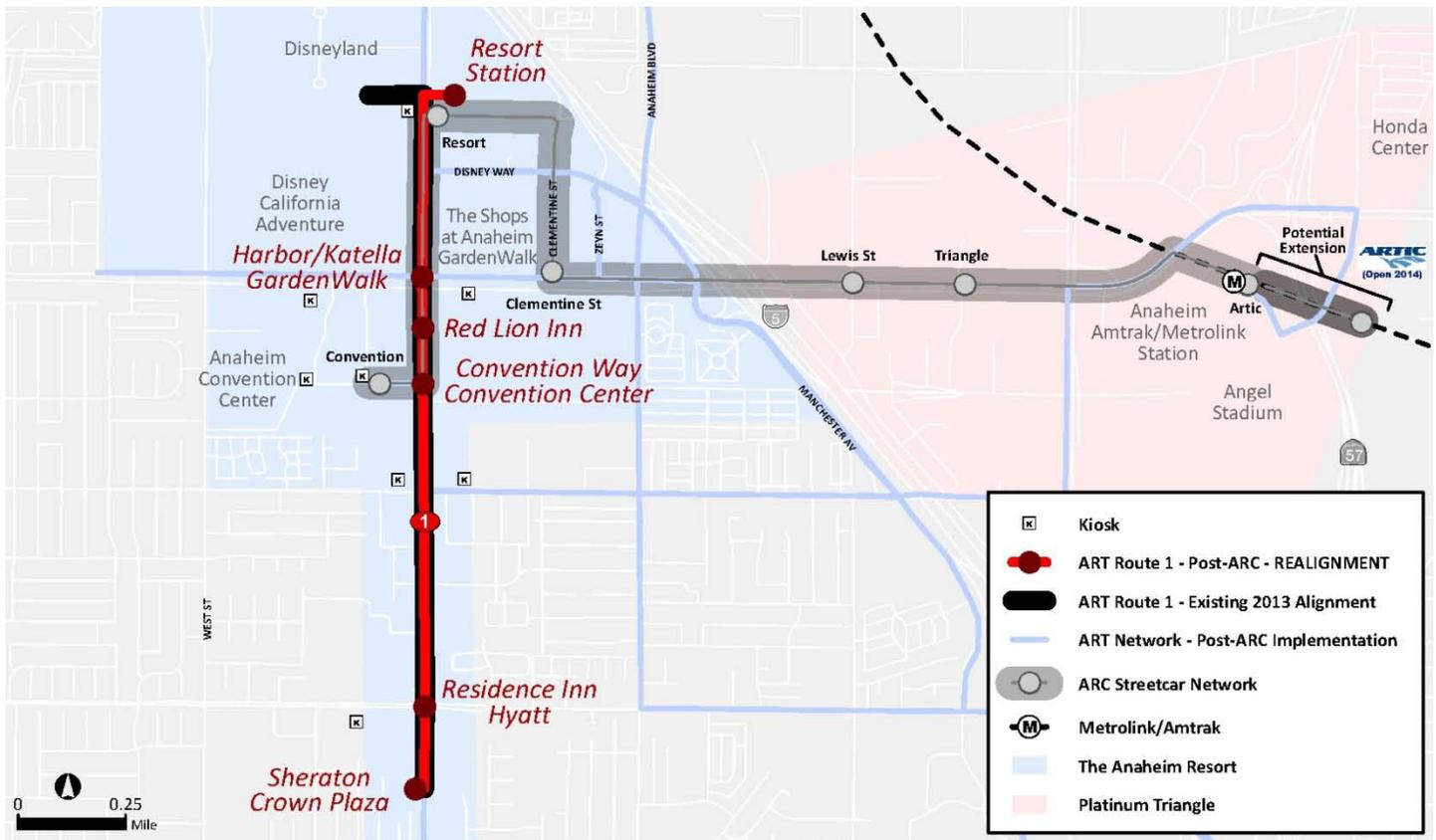
## Pre-ARC Service Description

Starting in January 2013, the Anaheim Canyon Metrolink Connector (ACM) will be expanded to The Anaheim Resort. ACM will provide peak service connecting the Anaheim Canyon Metrolink Station and The Anaheim Resort. Major stops include State College Boulevard & La Palma Avenue, Anaheim City Hall, Vermont Street, Disneyland® Resort, and the Anaheim Convention Center. This will be funded in part by a five-year grant from the Orange County Transportation Authority (OCTA).



## Appendix E: Post-ARC Route Profiles

# Route 1 (Post-ARC)



## Frequency and Span of Service

	<u>Existing</u>	<u>Post-ARC</u>
Frequency (minutes)	20	20
Span	Varies with park hours and special events	

## Destinations Served

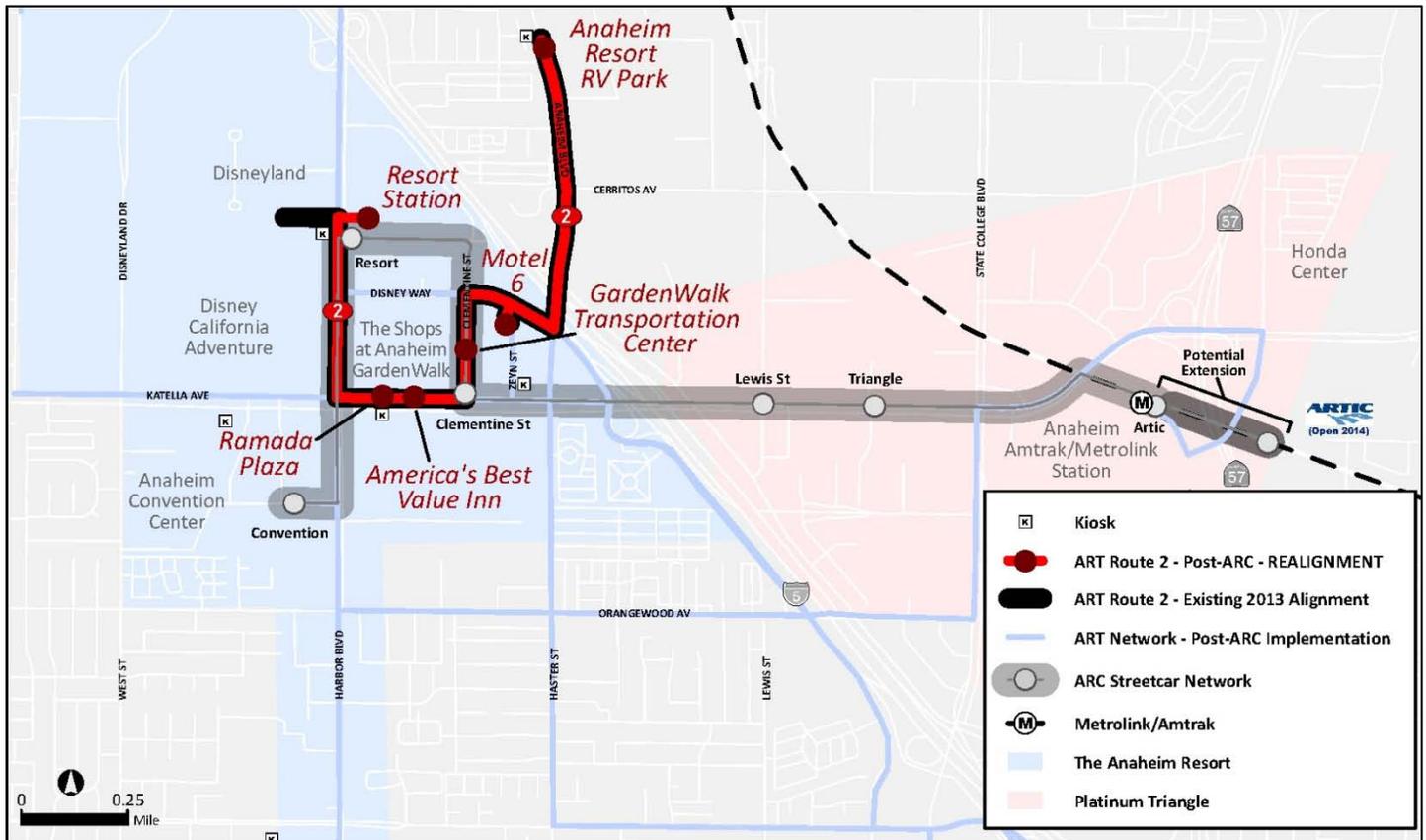
Disneyland® Resort, The Shops at GardenWalk, Red Lion Hotel, Anaheim Convention Center, Residence Inn, Hyatt, Sheraton, Crown Plaza, ARC

## Post-ARC Service Description

When ARC service begins in 2018 Route 1 will continue to provide coverage to those hotels on South Harbor Boulevard that will not have direct access to ARC. Customers riding Route 1 will have a choice of transferring to ARC at Convention Way or riding through on the one-seat ride to the Disneyland Resort.

The Post-ARC alignment shows the northern terminus of the route on the east side of Harbor Boulevard where the Disneyland® Transportation Center may potentially be relocated to complement ARC service.

# Route 2 (Post-ARC)



## Frequency and Span of Service

	Existing	Post-ARC
Frequency (minutes)	20	20
Span	Varies with park hours and special events	

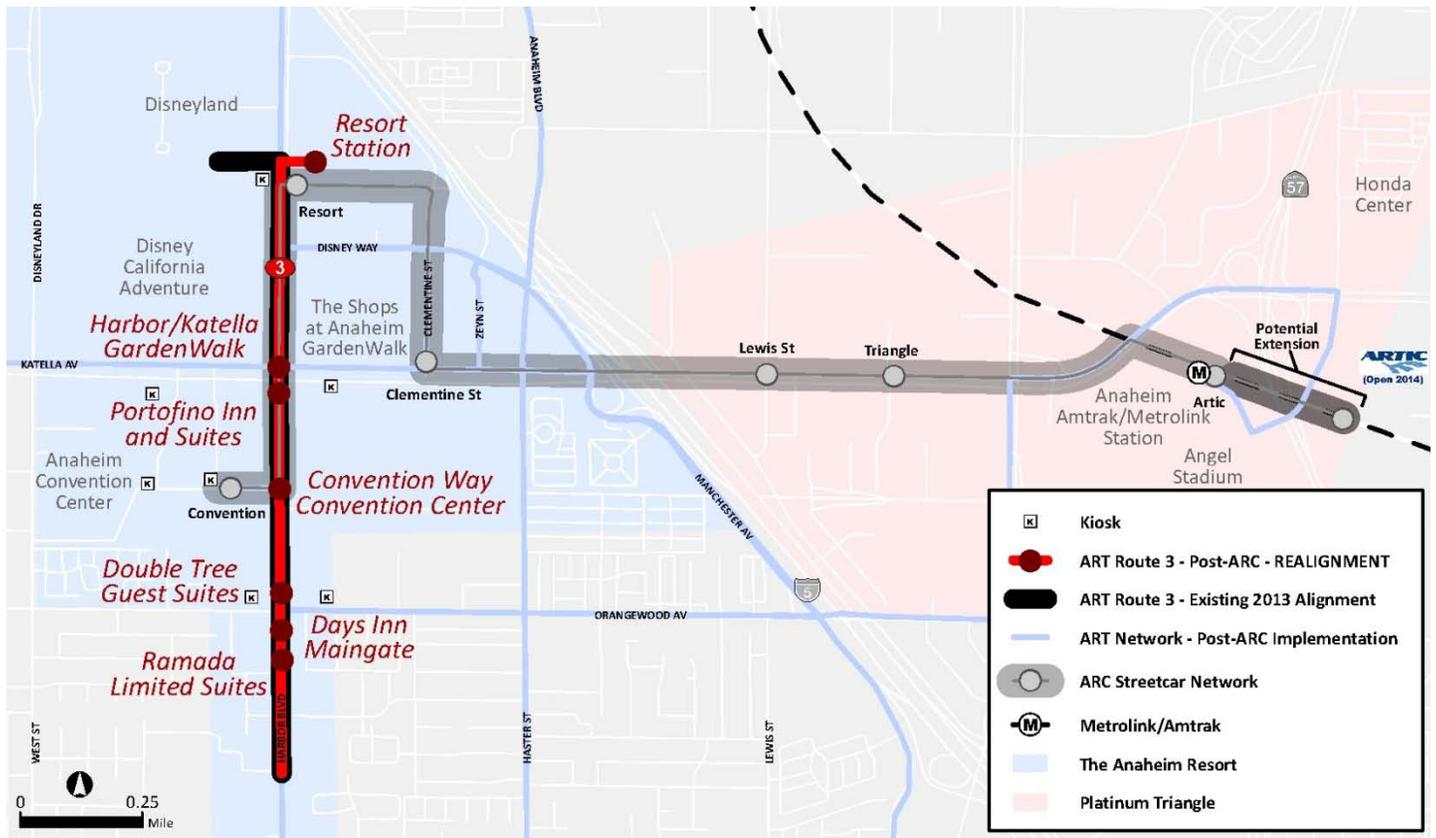
## Destinations Served

Disneyland® Resort, The Shops at GardenWalk, Anaheim Resort RV Park, Motel 6, America’s Best Value Inn, Ramada Plaza, ARC

## Post-ARC Service Description

The Post-ARC alignment will remain unchanged with the exception of the Disneyland® terminus where the Disneyland® Transportation Center may potentially be relocated to complement ARC service. No alignment changes are proposed since this route serves hotels outside of the walkshed (¼mile) to any proposed ARC stop.

# Route 3 (Post-ARC)



## Frequency and Span of Service

	Existing	Post-ARC
Frequency (minutes)	20	20
Span	Varies with park hours and special events	

## Destinations Served

Disneyland® Resort, The Shops at GardenWalk, Portofino Inn and Suites, DoubleTree Guest Suites, Days Inn Maingate, Ramada Limited Suites, ARC

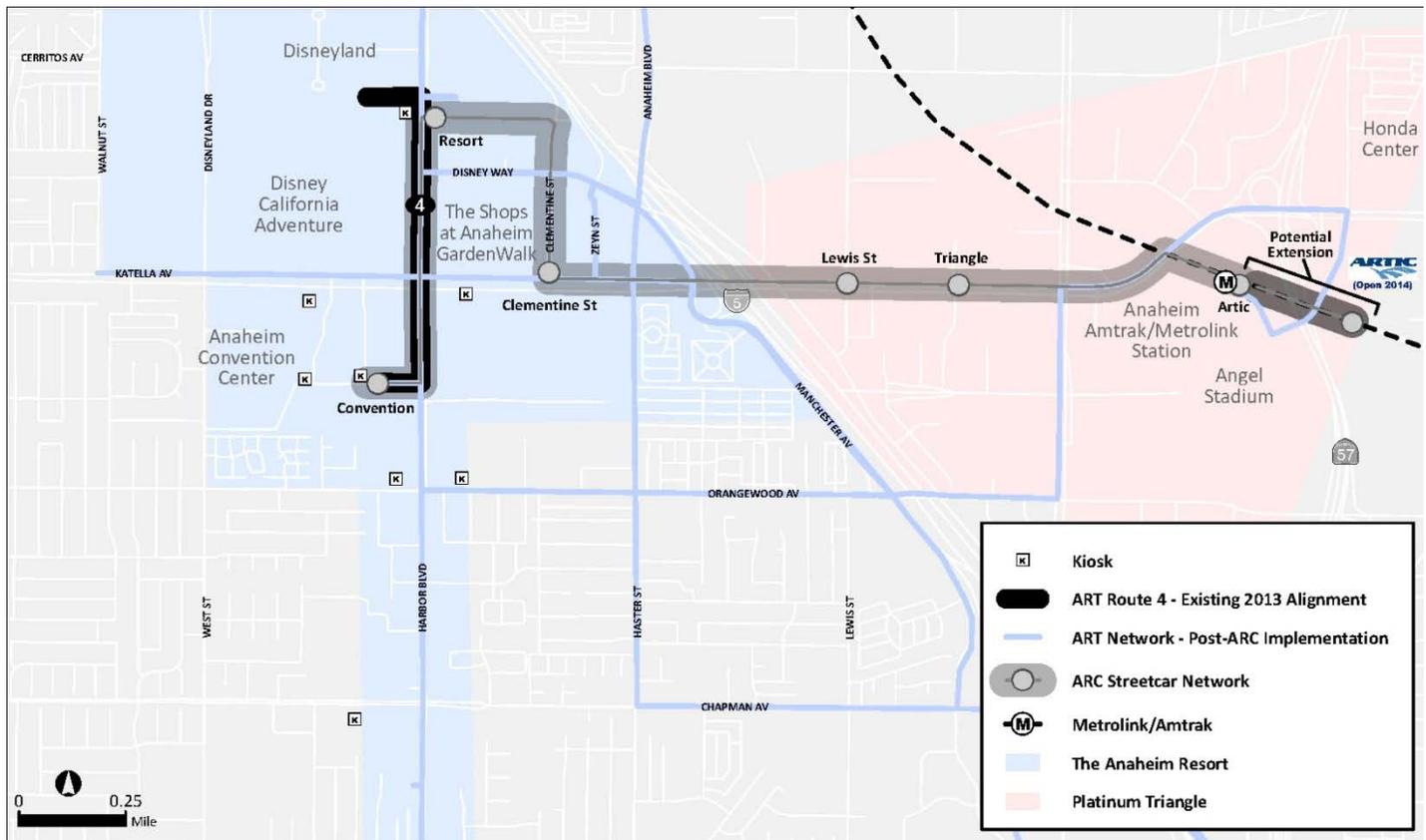
## Post-ARC Service Description

Route 3 will continue to serve hotels along the existing alignment including Portofino Inn and Suites, DoubleTree Guest Suites, Days Inn Maingate, and Ramada Limited Suites since these hotels do not have direct access to ARC. Cortona Inn and Suites located just south of Convention Way will be served by ARC since the proposed Convention Center stop is well within walking distance.

The Post-ARC alignment shows the northern terminus of the route on the east side of Harbor Boulevard where the Disneyland® Transportation Center may potentially be relocated to complement ARC service.



# Route 4 (Post-ARC)



## Frequency and Span of Service

	Existing	Post-ARC
Frequency (minutes)	20	Eliminate
Span	Varies with park hours and special events	

## Destinations Served

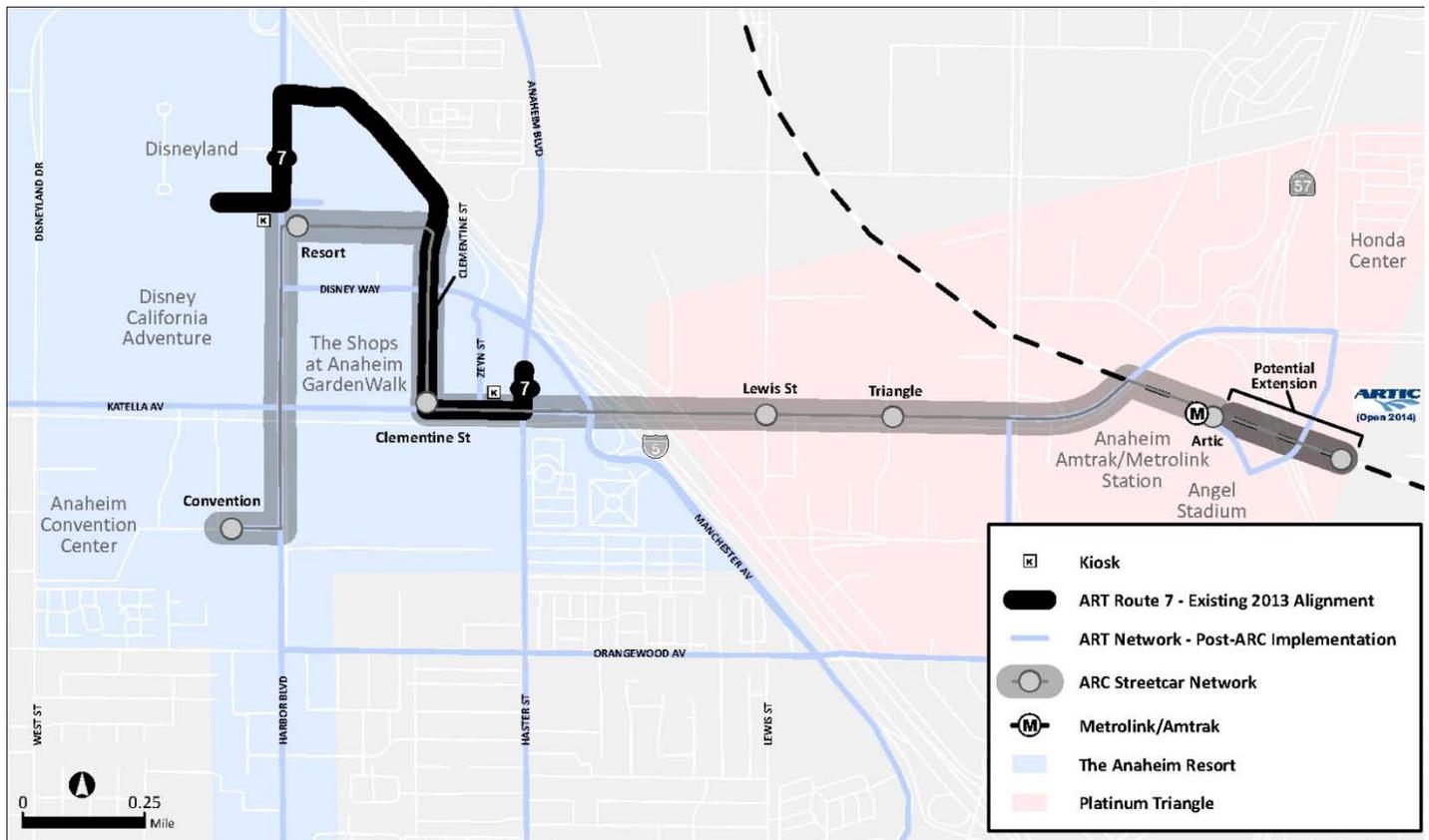
Service eliminated; ARC will provide connections to Disneyland® Resort, The Shops at GardenWalk, Anaheim Convention Center, Hilton, Marriott, Courtyard Anaheim, Sheraton Park, and the Clarion Hotel

## Post-ARC Service Description

Route 4 will be discontinued when ARC service begins in 2018 since the proposed ARC alignment will travel directly between Convention Way and Disneyland®.



# Route 7 (Post-ARC)



## Frequency and Span of Service

	Existing	Post-ARC
Frequency (minutes)	20	Eliminate
Span		Varies with park hours and special events

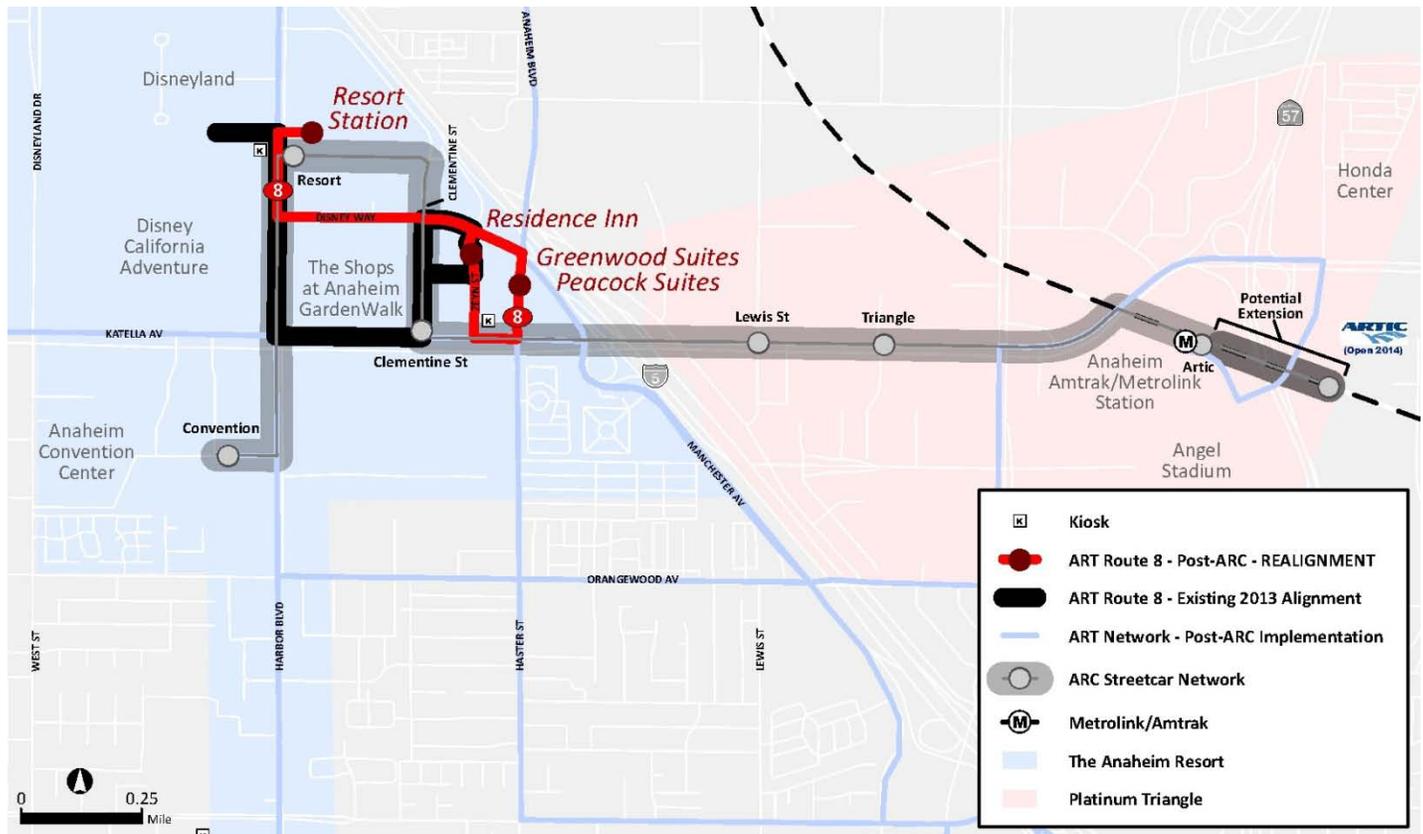
## Destinations Served

Service eliminated; Route 8 will provide service to Disneyland® Resort, Greenwood Suites, Peacock Suites, and Residence Inn. Route 10 will provide service to Howard Johnson

## Post-ARC Service Description

When ARC service begins in 2018, Route 7 will be eliminated. Route 8 will be restructured to serve Greenwood Suites, Peacock Suites, and Residence Inn. Route 10 will also be restructured to serve Howard Johnson.

# Route 8 (Post-ARC)



## Frequency and Span of Service

	Existing	Post-ARC
Frequency (minutes)	20	20
Span	Varies with park hours and special events	

## Destinations Served

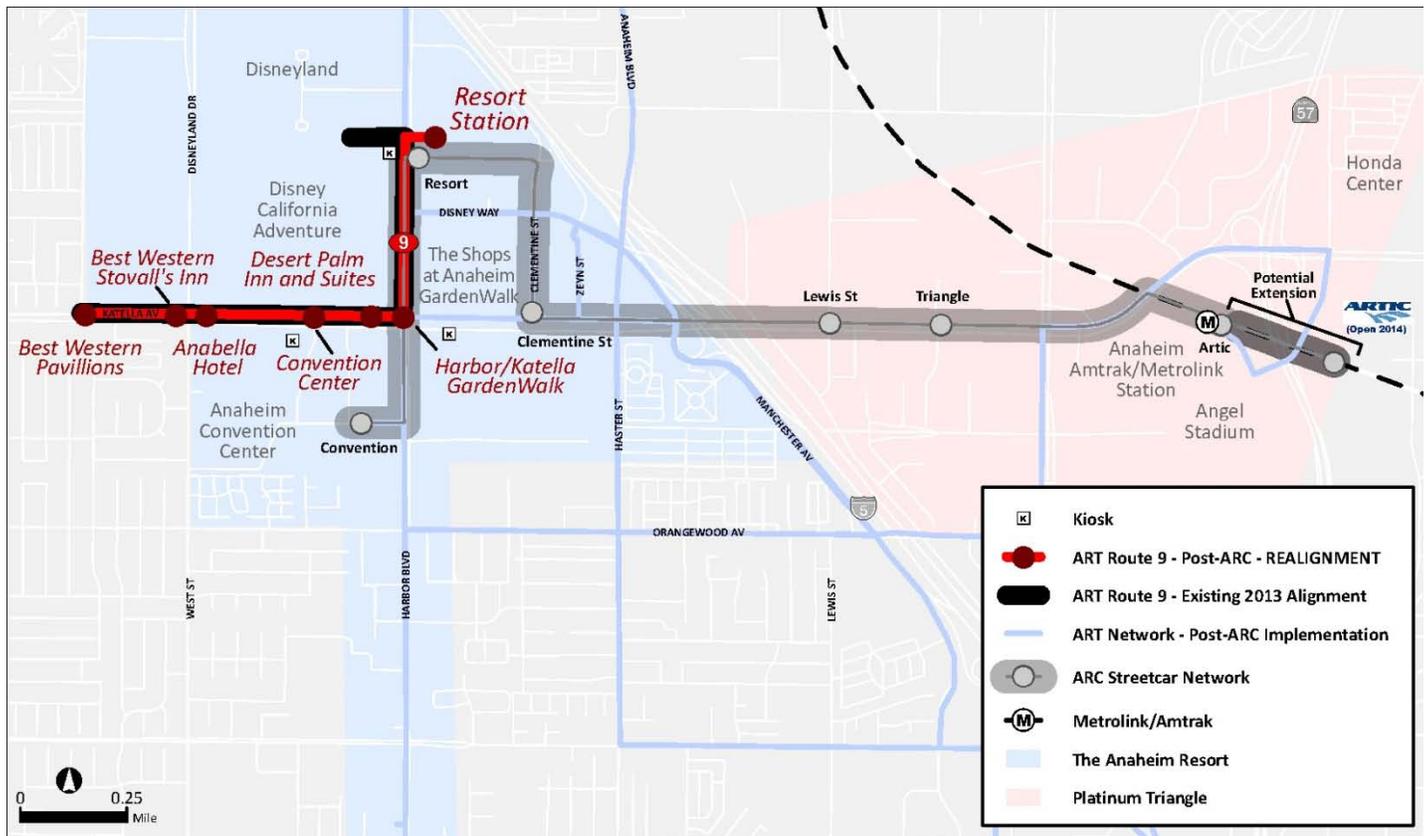
Disneyland® Resort, Greenwood Suites, Peacock Suites, Residence Inn, ARC

## Post-ARC Service Description

When ARC service begins in 2018 Route 8 will be realigned to serve hotels east of The Shops at GardenWalk that are not within walking distance to the Gardenwalk ARC stop. This includes Greenwood Suites, Peacock Suites, and Residence Inn. Guests staying at WorldMark, La Quinta, and Extended Stay America will have direct access to ARC at the corner of Katella Ave and Clementine Street.

The Post-ARC alignment shows the northern terminus of the route on the east side of Harbor Boulevard where the Disneyland® Transportation Center may potentially be relocated to complement ARC service.

# Route 9 (Post-ARC)



## Frequency and Span of Service

	Existing	Post-ARC
Frequency (minutes)	20	20
Span	Varies with park hours and special events	

## Destinations Served

Disneyland® Resort, The Shops at GardenWalk, Anaheim Convention Center, Desert Palm Inn and Suites, Anabella Hotel, Best Western Stovall's Inn, Best Western Pavillions, ARC

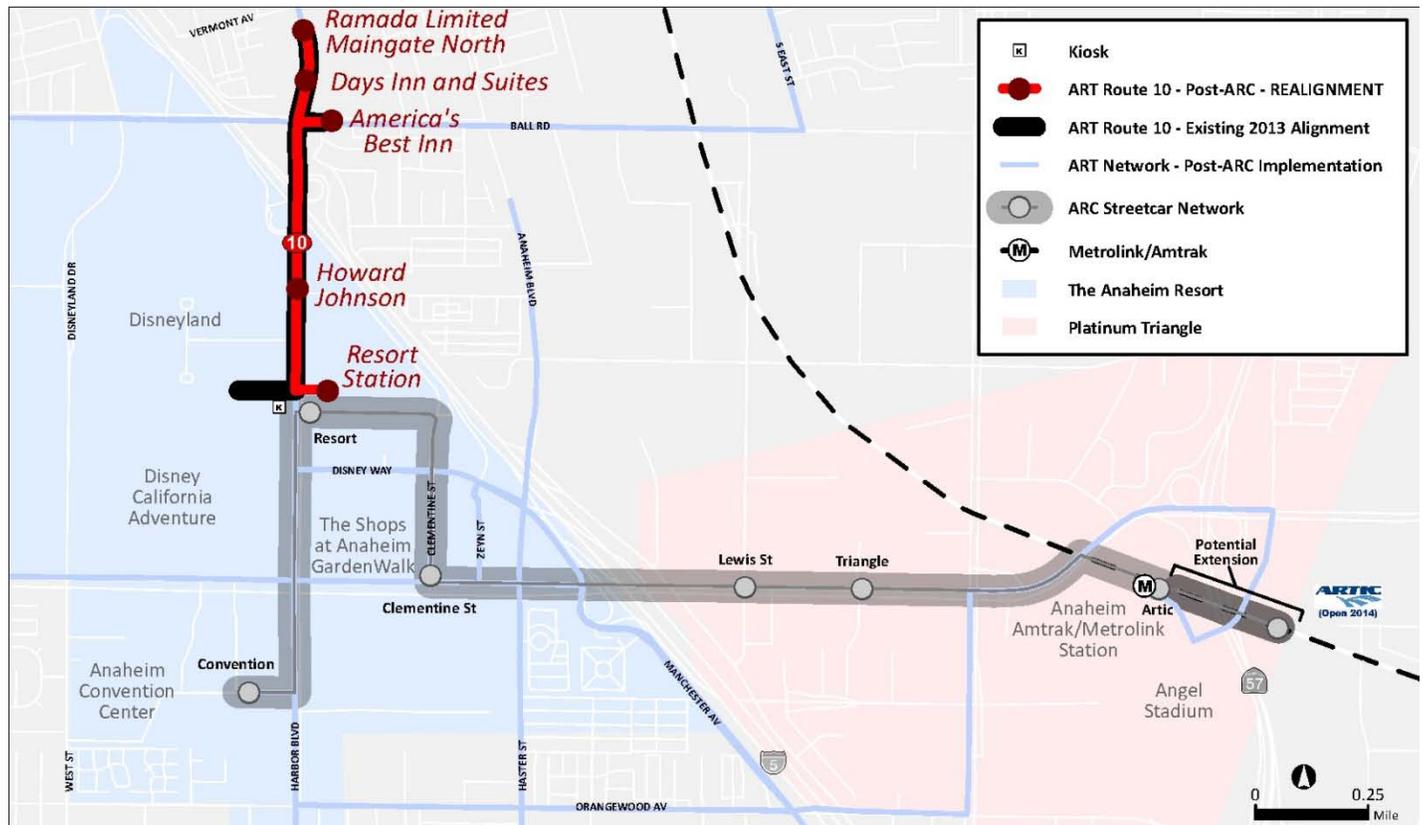
## Post-ARC Service Description

Route 9 will continue to provide coverage to those hotels west of Katella Avenue that will not have direct access to ARC when service begins in 2018. Customers riding Route 9 will still have a one-seat ride to the Disneyland® Resort.

The Post-ARC alignment shows the northern terminus of the route on the east side of Harbor Boulevard where the Disneyland® Transportation Center may potentially be relocated to complement ARC service.



# Route 10 (Post-ARC)



## Frequency and Span of Service

	Existing	Post-ARC
Frequency (minutes)	20	20
Span	Varies with park hours and special events	

## Destinations Served

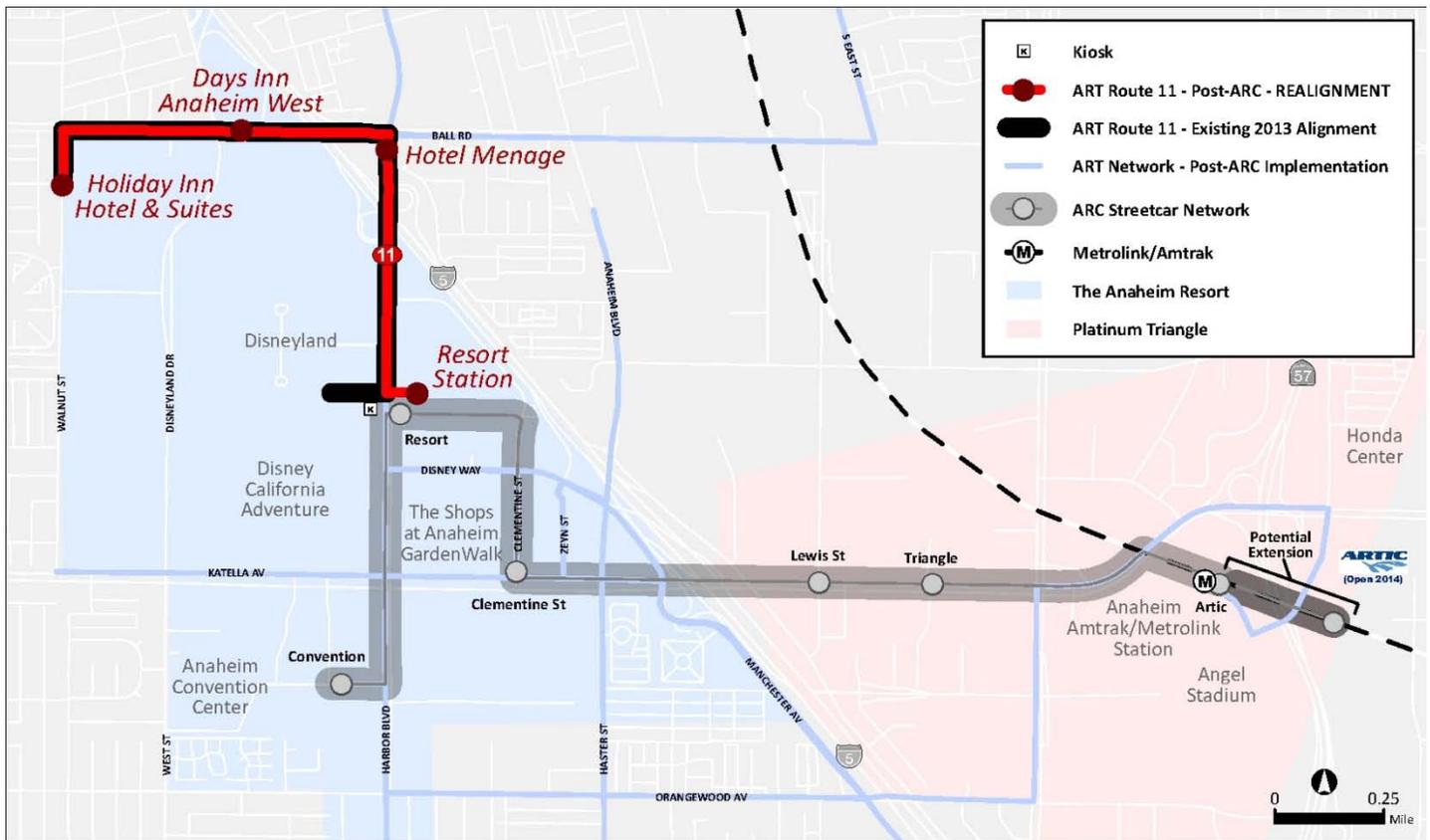
Disneyland® Resort, Ramada Limited Maingate North, Days Inn and Suites, America's Best Inn, Howard Johnson hotel, ARC

## Post-ARC Service Description

Route 10 will continue to provide coverage to hotels north on Harbor Boulevard including Ramada Limited Maingate North, Days Inn and Suites, and America's Best Inn that will not have direct access to ARC when service begins in 2018. Routes 10 will also pickup guests at the Howard Johnson hotel that was previously served by Route 7.

The Post-ARC alignment shows the southern terminus of the route on the east side of Harbor Boulevard where the Disneyland® Transportation Center may potentially be relocated to complement ARC service.

# Route 11 (Post-ARC)



## Frequency and Span of Service

	Existing	Post-ARC
Frequency (minutes)	20	20
Span	Varies with park hours and special events	

## Destinations Served

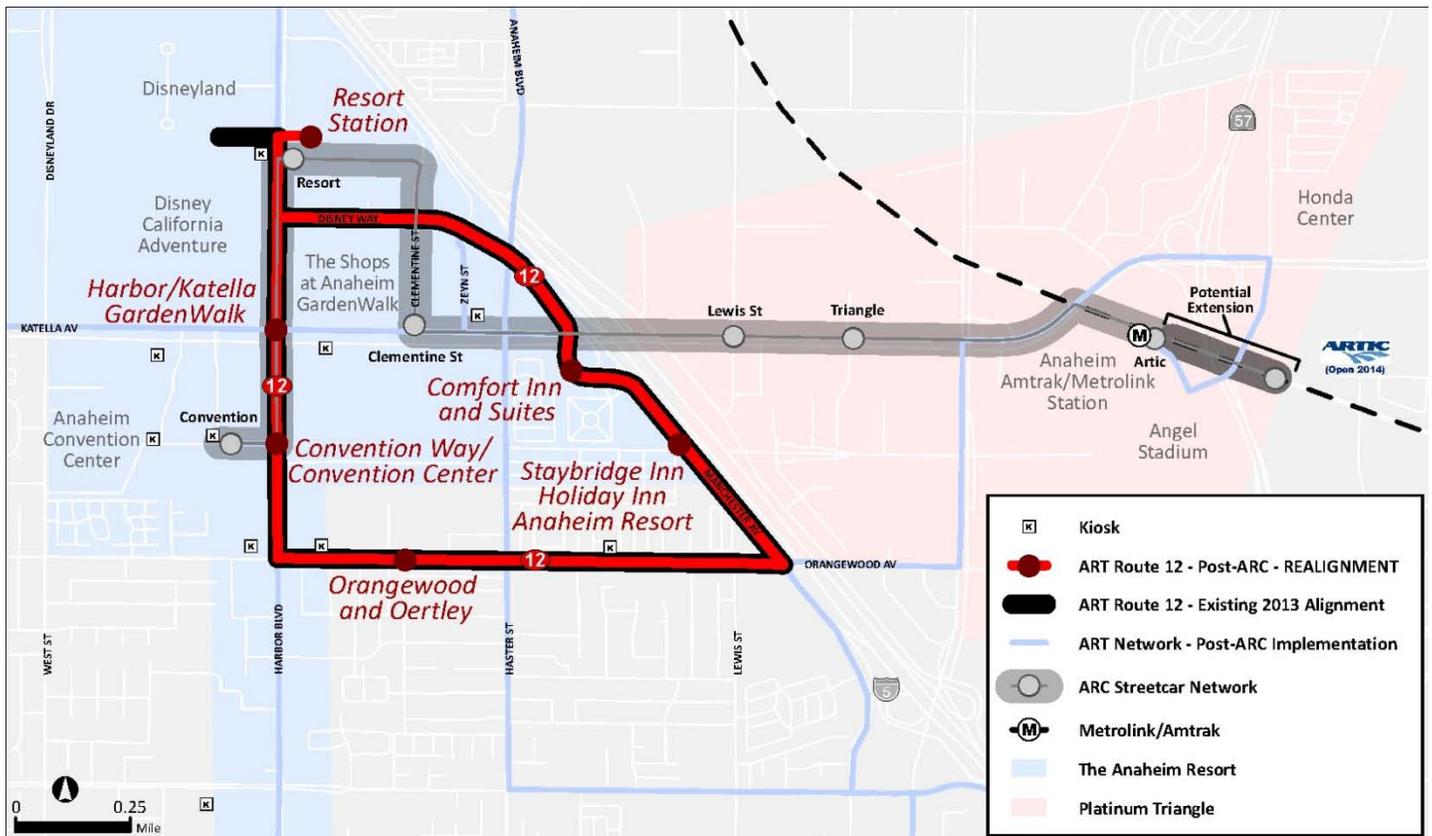
Disneyland® Resort, Hotel Menage, Days Inn Anaheim West, Holiday Inn Hotel & Suites ARC

## Post-ARC Service Description

Route 11 will continue to provide coverage to hotels on Ball Road and Walnut Street that will not have direct access to ARC when service begins in 2018. Customers riding Route 11 will still have a one-seat ride to the Disneyland® Resort.

The Post-ARC alignment shows the southern terminus of the route on the east side of Harbor Boulevard where the Disneyland® Transportation Center may potentially be relocated to complement ARC service.

# Route 12 (Post-ARC)



## Frequency and Span of Service

	Existing	Post-ARC
Frequency (minutes)	20	20
Span	Varies with park hours and special events	

## Destinations Served

Disneyland® Resort, The Shops at GardenWalk, Anaheim Convention Center, Comfort Inn and Suites, Holiday Inn, ARC

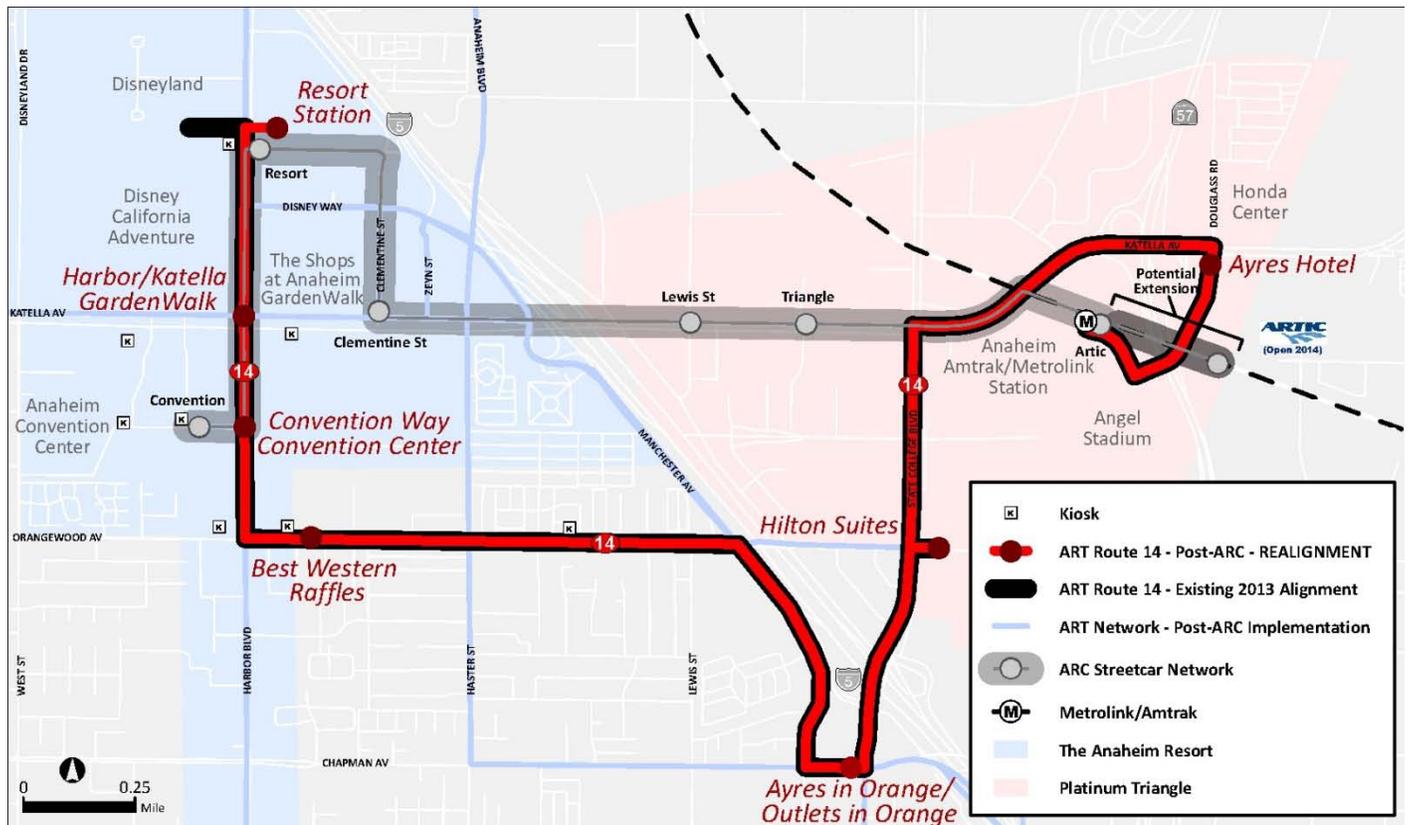
## Post-ARC Service Description

Route 12 will continue to provide coverage to Comfort Inn and Suites and Holiday Inn on Manchester Avenue that will not have direct access to ARC when service begins in 2018. Customers riding Route 12 will still have a one-seat ride to the Disneyland Resort, and also have the choice to transfer to ARC at Convention Station.

The Post-ARC alignment shows the northern terminus of the route on the east side of Harbor Boulevard where the Disneyland® Transportation Center may potentially be relocated to complement ARC service.



# Route 14 (Post-ARC)



## Frequency and Span of Service

	Existing	Post-ARC
Frequency (minutes)	30	30*
Span	Varies with park hours and special events	

## Destinations Served

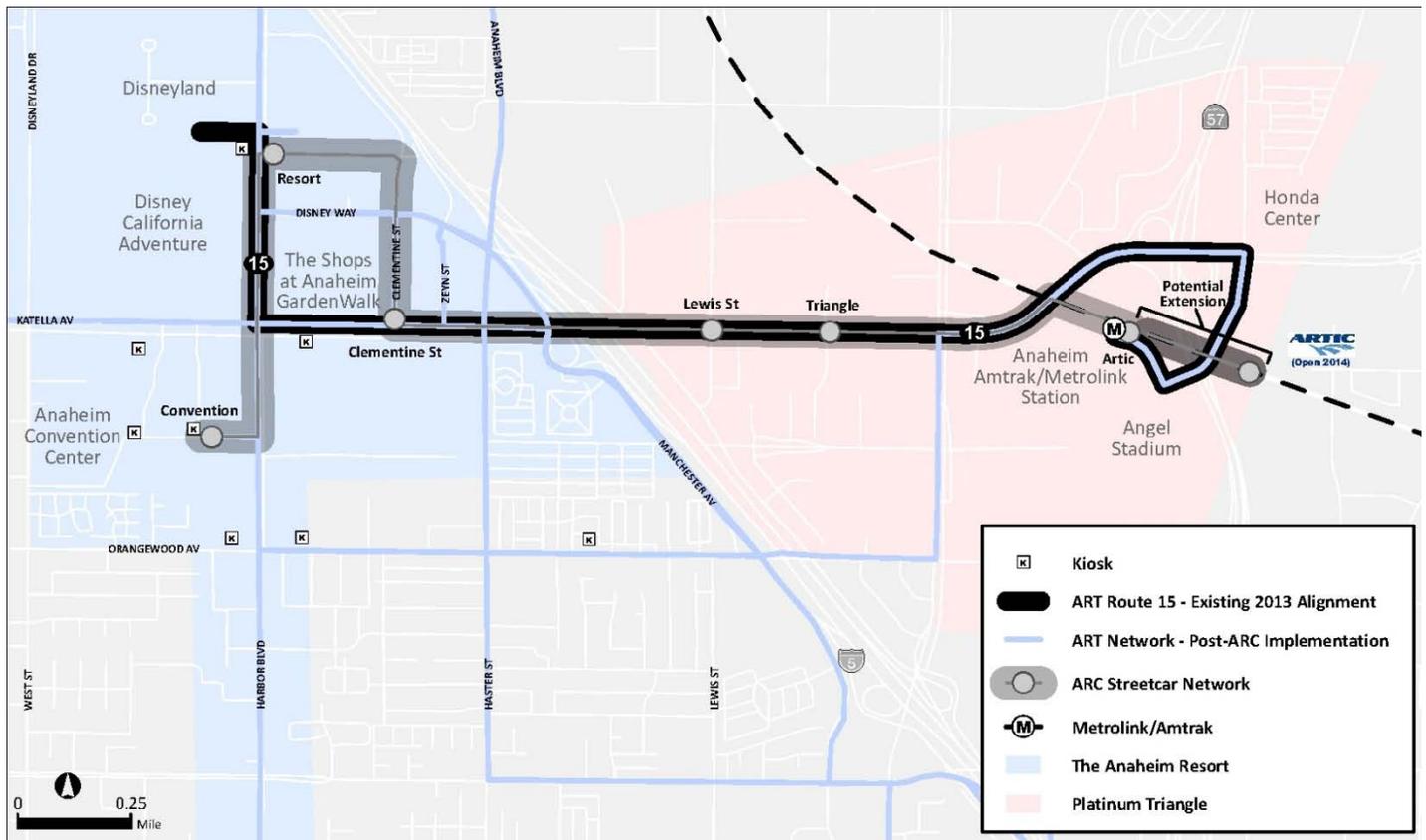
Disneyland® Resort, The Shops at GardenWalk, Anaheim Convention Center, Best Western Raffles, Hilton Suites, Ayres Hotel, ARTIC, ARC

## Post-ARC Service Description

After ARC service begins in 2018, the route will continue to serve hotels along Orangewood Avenue including Best Western Raffles and Hilton Suites. Routes 14 will also pickup guests at the Ayres hotel that was previously served by Route 15.

The Post-ARC alignment shows the northern terminus of the route on the east side of Harbor Boulevard where the Disneyland® Transportation Center may potentially be relocated to complement ARC service.

# Route 15 (Post-ARC)



## Frequency and Span of Service

	Existing	Post-ARC
Frequency (minutes)	60	Eliminate
Span	Varies with park hours	and special events

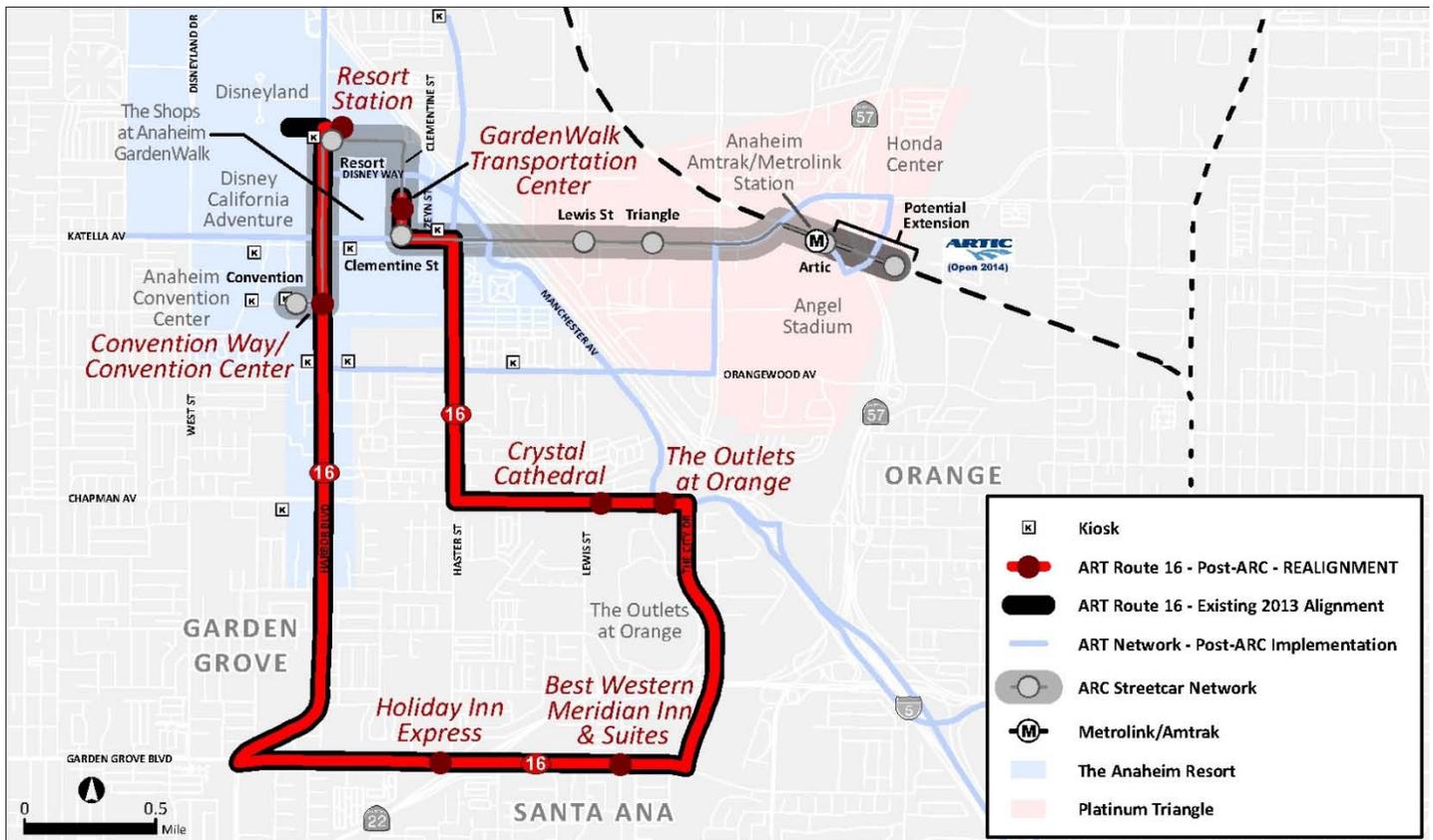
## Destinations Served

Service eliminated. Disneyland® Resort, The Shops at GardenWalk, Stadium Lofts, Townplace Suites, and Anaheim Amtrak/Metrolink Station/ARTIC will be served by ARC; Ayres Hotel will be served by Route 14

## Post-ARC Service Description

Route 15 will be discontinued when ARC service begins in 2018 since the proposed ARC alignment will travel directly between the Anaheim Amtrak Station/ARTIC and Disneyland®. The Ayres Hotel will be served by Route 14.

# Route 16 (Post-ARC)



## Frequency and Span of Service

	Existing	Post-ARC
Frequency (minutes)	60	60
Span	Varies with park hours and special events	

## Destinations Served

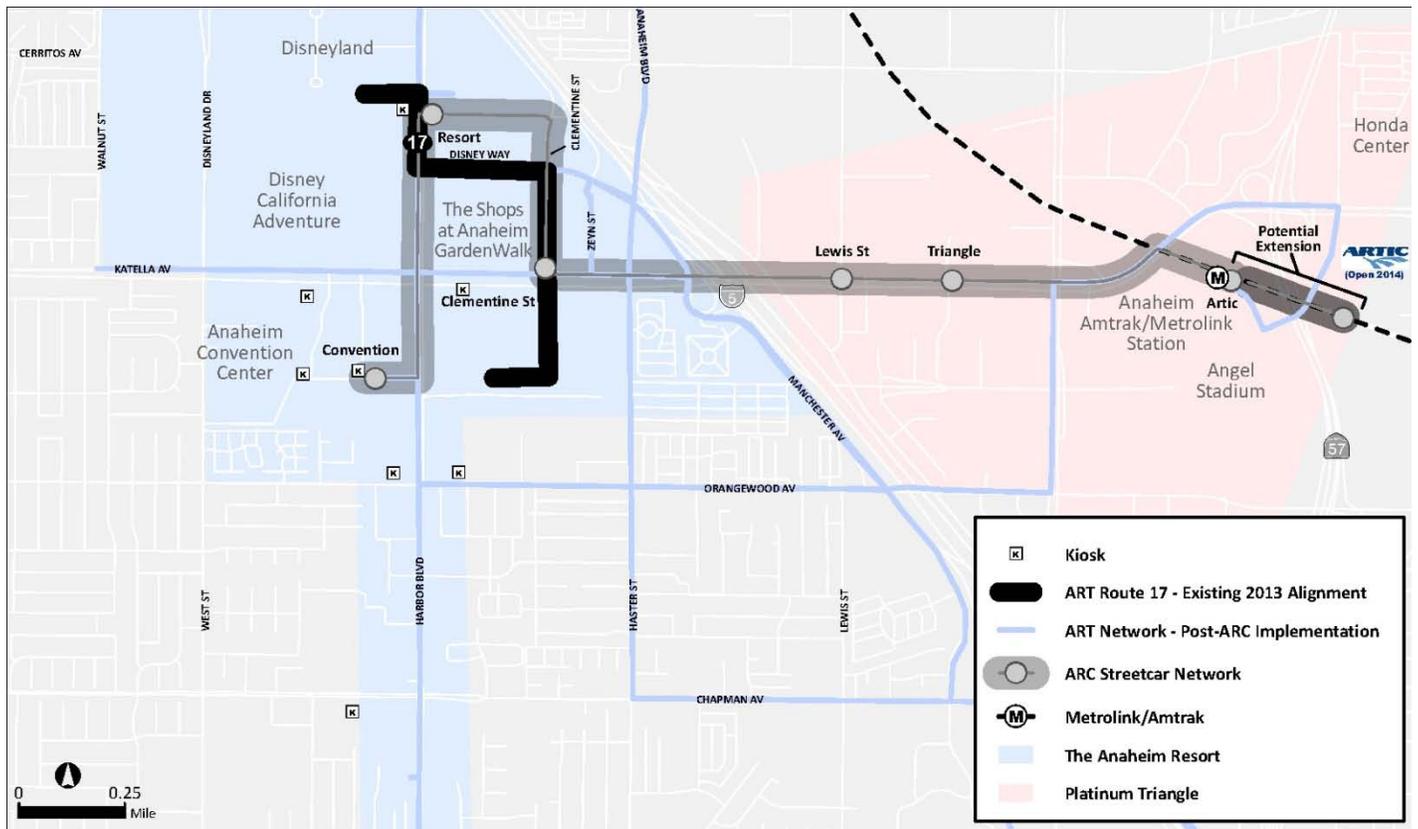
Disneyland® Resort, The Shops at GardenWalk, Anaheim Convention Center, Crystal Cathedral, The Outlets at Orange, Best Western Meridian Inn & Suites, Holiday Inn Express, ARC

## Post-ARC Service Description

After ARC service begins in 2018, the route will continue to serve destinations and hotels south of The Anaheim Resort including Crystal Cathedral, The Outlets at Orange, Best Western Meridian Inn & Suites, and Holiday Inn Express.

The Post-ARC alignment shows the northern terminus of the route on the east side of Harbor Boulevard where the Disneyland® Transportation Center may potentially be relocated to complement ARC service.

# Route 17 (Post-ARC)



## Frequency and Span of Service

	Existing	Post-ARC
Frequency (minutes)	20	Eliminate
Span	Varies with park hours and special events	

## Destinations Served

Service eliminated; alternative parking option is assumed to be provided along ARC alignment

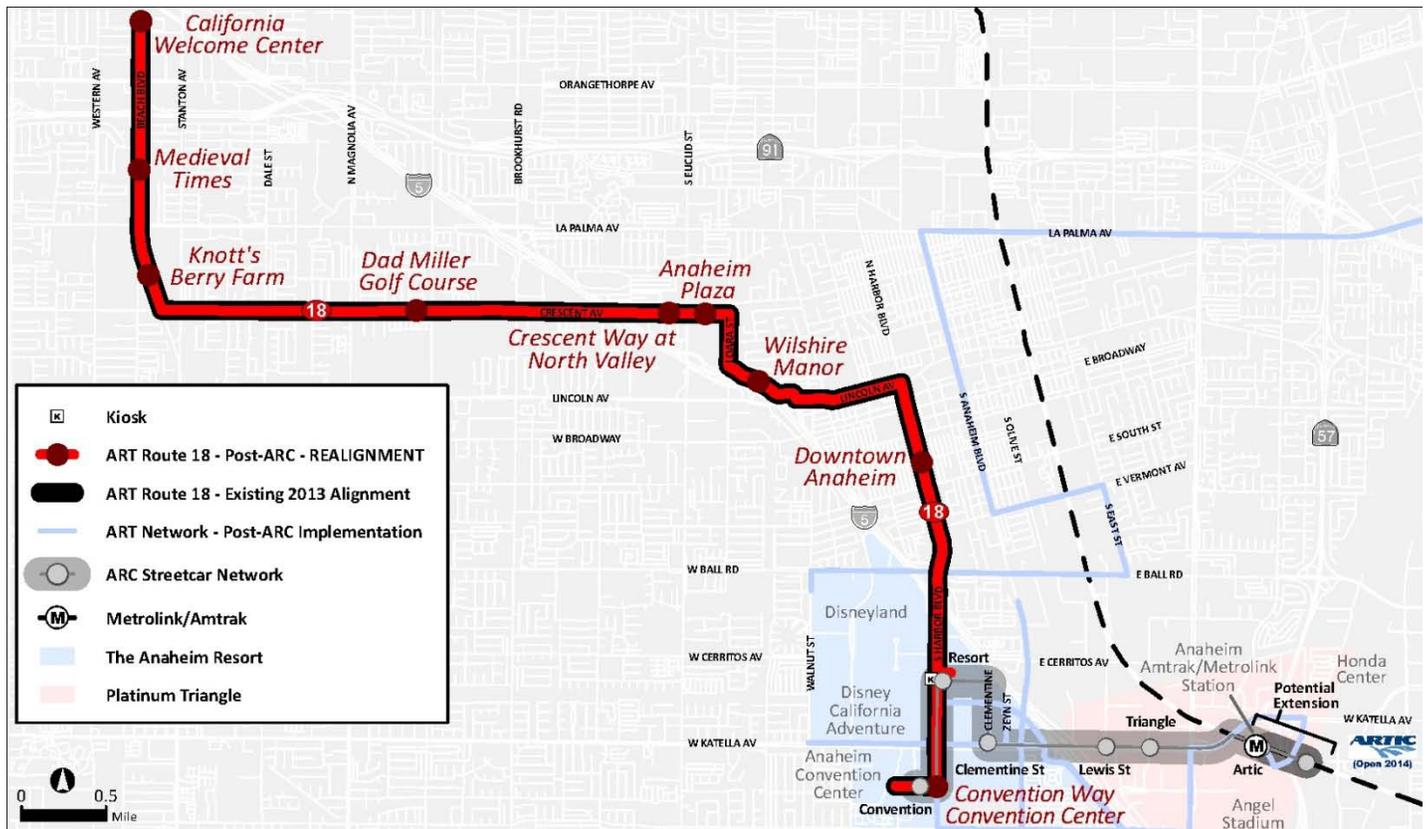
## Post-ARC Service Description

Route 17 will be discontinued when ARC service begins in 2018 based on the assumption that the Toy Story Parking Lot will be relocated along the ARC alignment<sup>1</sup>.

<sup>1</sup> The Conditional Use Permit for the Toy Story Parking lot expires in 2019. Route 17 may operate until 2019 in order to provide an additional year to transition parking to a location along ARC.



# Route 18 (Post-ARC)



## Frequency and Span of Service

	Existing	Post-ARC
Frequency (minutes)	60	60
Span	Varies with park hours and special events	

## Destinations Served

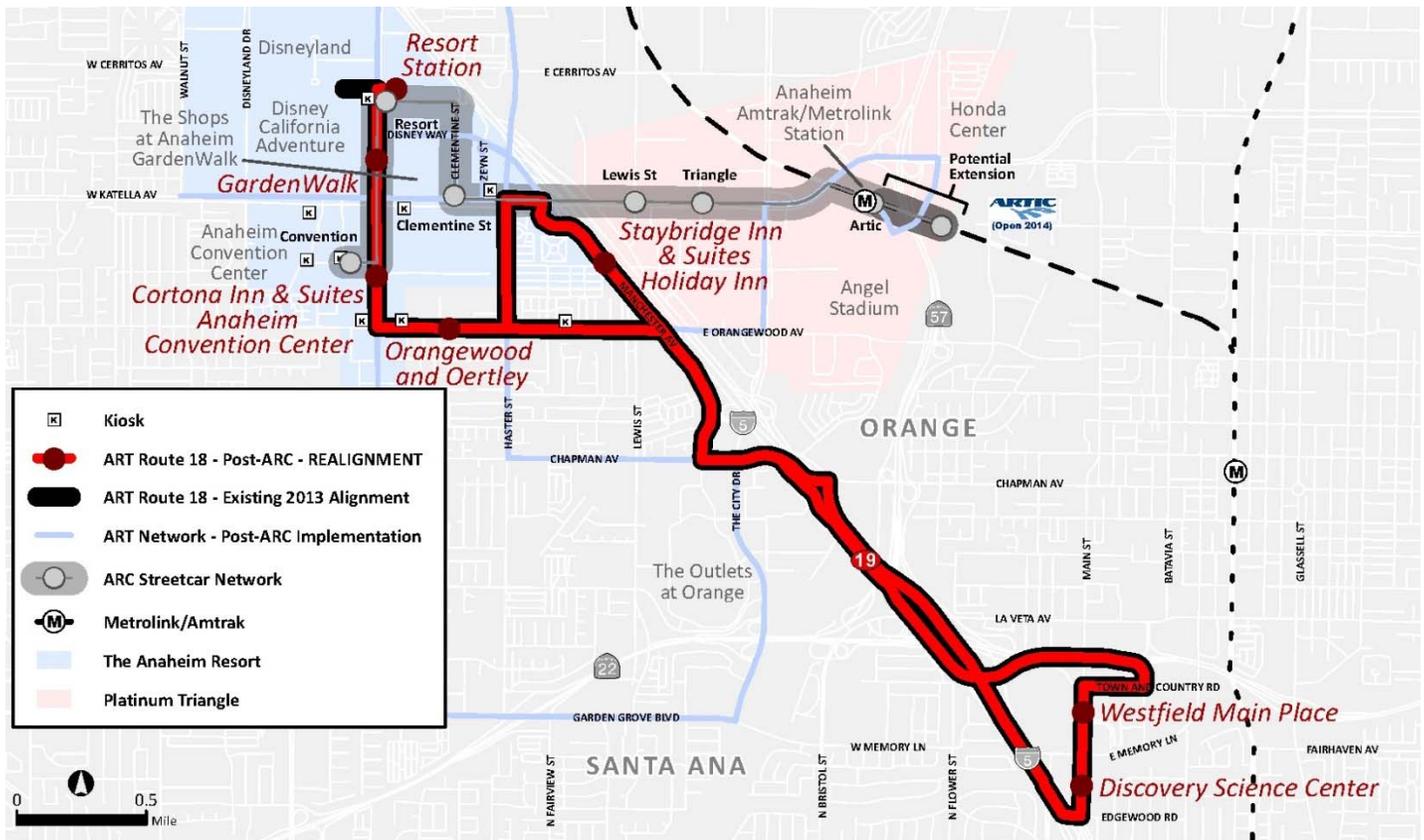
Disneyland® Resort, The Shops at GardenWalk, Anaheim Convention Center, Downtown Anaheim, Knott's Berry Farm, ARC

## Post-ARC Service Description

Route 18 began operating service to Knott's Berry Farm in 2012. ART is currently monitoring the performance of this service. As demand warrants service, the route will remain operating along the same alignment after ARC comes online in 2018.



# Route 19 (Post-ARC)



## Frequency and Span of Service

	Existing	Post-ARC
Frequency (minutes)	60	60
Span	Varies with park hours and special events	

## Destinations Served

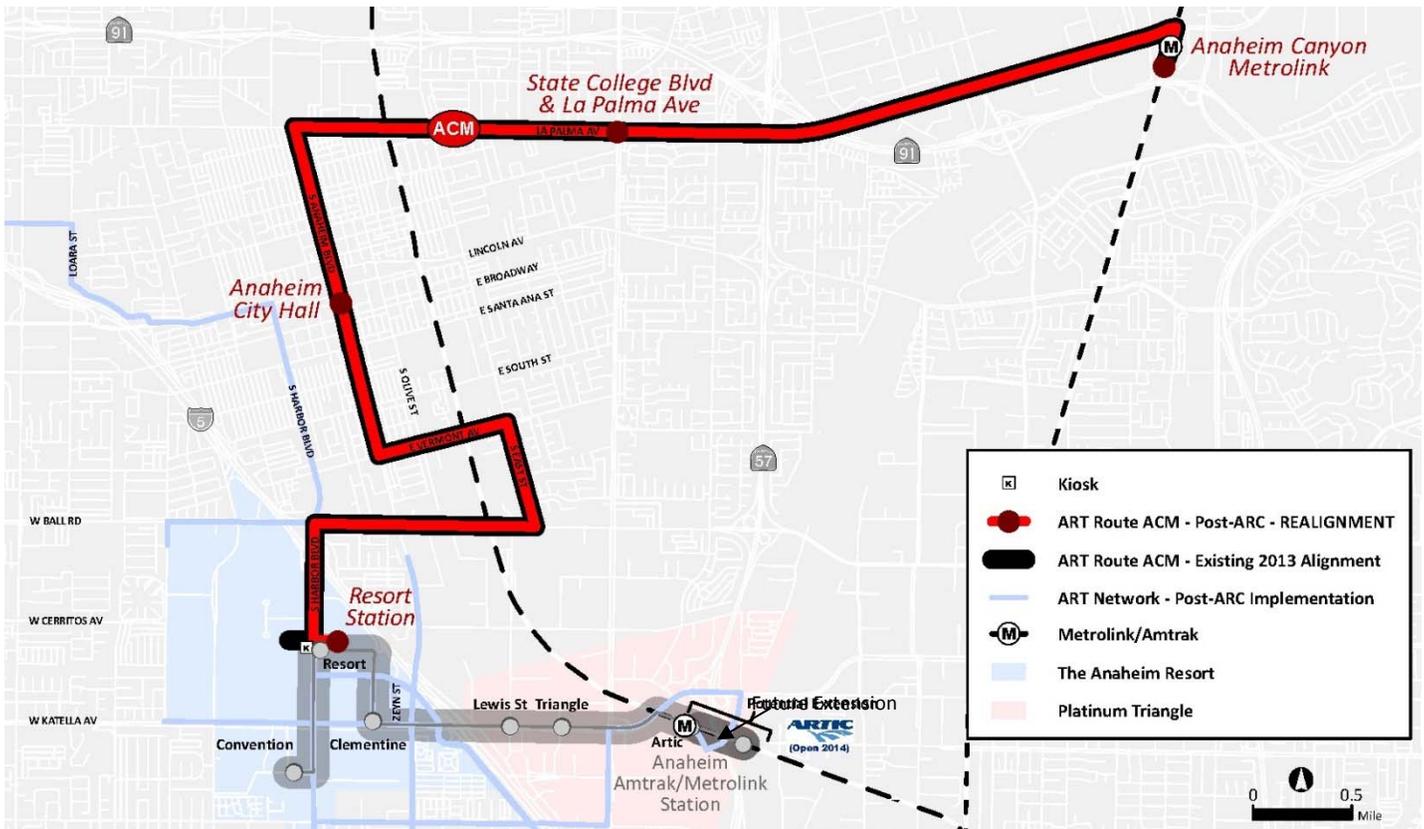
Disneyland® Resort, The Shops at GardenWalk, Anaheim Convention Center, Staybridge Inn & Suites, Holiday Inn, Westfield Main Place, Discovery Science Center

## Post-ARC Service Description

Route 19 began operating service to Westfield Main Place and Discovery Science Center in 2012. ART is currently monitoring the performance of this service. As demand warrants service, the route will remain operating along the same alignment after ARC comes online in 2018.

The Post-ARC alignment shows the northern terminus of the route on the east side of Harbor Boulevard where the Disneyland® Transportation Center may potentially be relocated to complement ARC service.

# Route ACM (Post-ARC)



## Frequency and Span of Service

	AM Peak	PM Peak
Existing	4 Trips	3 Trips
Pre-ARC	4 Trips	3 Trips

## Destinations Served

Anaheim Convention Center, Disneyland® Resort, Downtown Anaheim, Anaheim City Hall, Anaheim Canyon Metrolink

## Post-ARC Service Description

Starting in January 2013, the Anaheim Canyon Metrolink Connector (ACM) will be expanded to The Anaheim Resort. ACM will provide peak service connecting the Anaheim Canyon Metrolink Station and The Anaheim Resort. Major stops include State College Boulevard & La Palma Avenue, Anaheim City Hall, Vermont Street, Disneyland® Resort, and the Anaheim Convention Center. This will be funded in part by a five-year grant from the Orange County Transportation Authority (OCTA).

Post-ARC, ACM will connect with ARC at the Disneyland® Resort Station.