

OAKLAND  
INTERNATIONAL  
AIRPORT

I ✈ OAK

# OAK Today

February 2018

The best way to San Francisco Bay.

VISITA  
PASSEJA  
CURTA A SOPAR  
DEIXA'T ANAR  
VESEN BICICLI  
DESOOBREIX  
DESPLAÇA'T  
VOLACOMELSD'ALLA

OAKLAND  
INTERNATIONAL  
AIRPORT I ✈ OAK

OAKLAND  
INTERNATIONAL  
AIRPORT

I  OAK

SEE  
SWIRL  
SMELL  
SIP

FLY LIKE A LOCAL

SAVOR

DINE

EXPLORE





SVØM  
DYK  
SURF  
PLASK RUNDT  
BLIV GENNEMBLØT  
FLYD RUNDT  
SLIK SOLSKIN

FLYV SOM DELOKALE

OAKLAND  
INTERNATIONAL  
AIRPORT I ✈ OAK

4th

BUSIEST AIRPORT  
IN CALIFORNIA

60+

NON-STOP  
DESTINATIONS

LOWEST

CPE

IN THE BAY AREA

14

INTERNATIONAL  
DESTINATIONS  
(MEXICO & EUROPE)

SF BAY AREA IS THE

3rd

LARGEST U.S.  
O&D MARKET

SURPASSED

13

MILLION  
PASSENGERS  
AND GROWING

I  OAK

The best way to San Francisco Bay.

**Superior  
Aeronautical  
Reliability**

**Great Weather  
No Curfew**

**Room to  
Grow**

**Facility  
Improvements  
Underway**



The best way to San Francisco Bay.



# ESCAPE LOUNGE OPENS AT OAK

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- ✈ Manchester Airport Group (MAG) designed, built and managed in a \$2.3m investment at OAK
- ✈ Terminal One location
- ✈ Open to all passengers
- ✈ Pairs well with premium class products
- ✈ Priority Pass and American Express Platinum cardholders can access



# BART UPDATE

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- ✈ 35% YOY increase vs. bus
- ✈ 1 year = 1 million passengers
- ✈ Major upgrades to mainline BART equipment began in 2016





✈ TOP STATIONS:

SF Embarcadero, SF Montgomery,  
SF Powell, Downtown Berkeley, SF  
Civic Center

✈ Immediate acceptance by  
traveling public



**“Oakland is closer to San Francisco than San Francisco is”**

*-Jerry Brown, Gov. of California*



# OAK

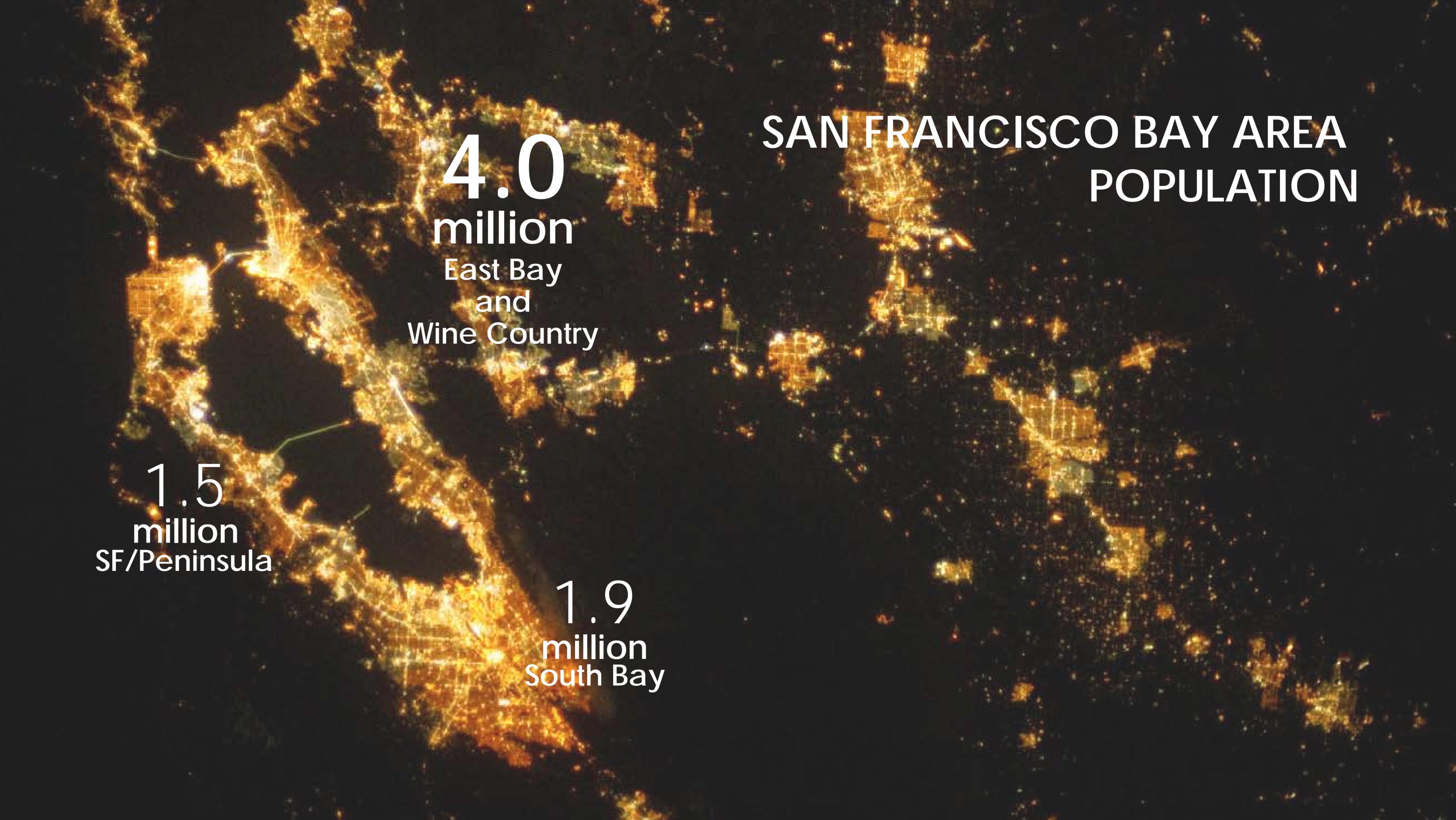
## Fly The East Bay Way



A wide-angle photograph of the Golden Gate Bridge in San Francisco, taken from a high vantage point on a hill. The bridge's iconic red-orange towers and suspension cables are prominent, spanning the blue water of the bay. The background features rolling hills with sparse vegetation and distant city buildings under a soft, hazy sky at sunset or sunrise. The overall tone is warm and scenic.

**7.51**  
**million**

In the SF Bay Area Region



SAN FRANCISCO BAY AREA  
POPULATION

This satellite image shows the San Francisco Bay Area at night, with city lights glowing against the dark landscape. The image is overlaid with semi-transparent colored regions representing different population density areas. The East Bay and Wine Country area is highlighted in a light blue/purple hue, the San Francisco Peninsula in a light green hue, and the South Bay area in a light orange/red hue. The text labels for these areas are placed directly over their respective regions.

4.0  
million  
East Bay  
and  
Wine Country

1.5  
million  
SF/Peninsula

1.9  
million  
South Bay

A wide-angle photograph of the Golden Gate Bridge in San Francisco, California. The bridge's iconic orange-red towers and suspension cables are prominent on the left side of the frame. The bridge spans the Golden Gate Strait, with the city of San Francisco visible in the background on the hills. The water is a deep blue, and the sky is a clear, pale blue. The text is overlaid on the right side of the image, within a semi-transparent grey box.

Affluence in the East Bay  
equates to **double the average**  
Bay Area propensity to travel

From over 200 Bay Area zip codes the Top 20 most affluent (representing 2% of the population) generate over 8% Bay Area originating travel

9 of the 20  
are in the East Bay

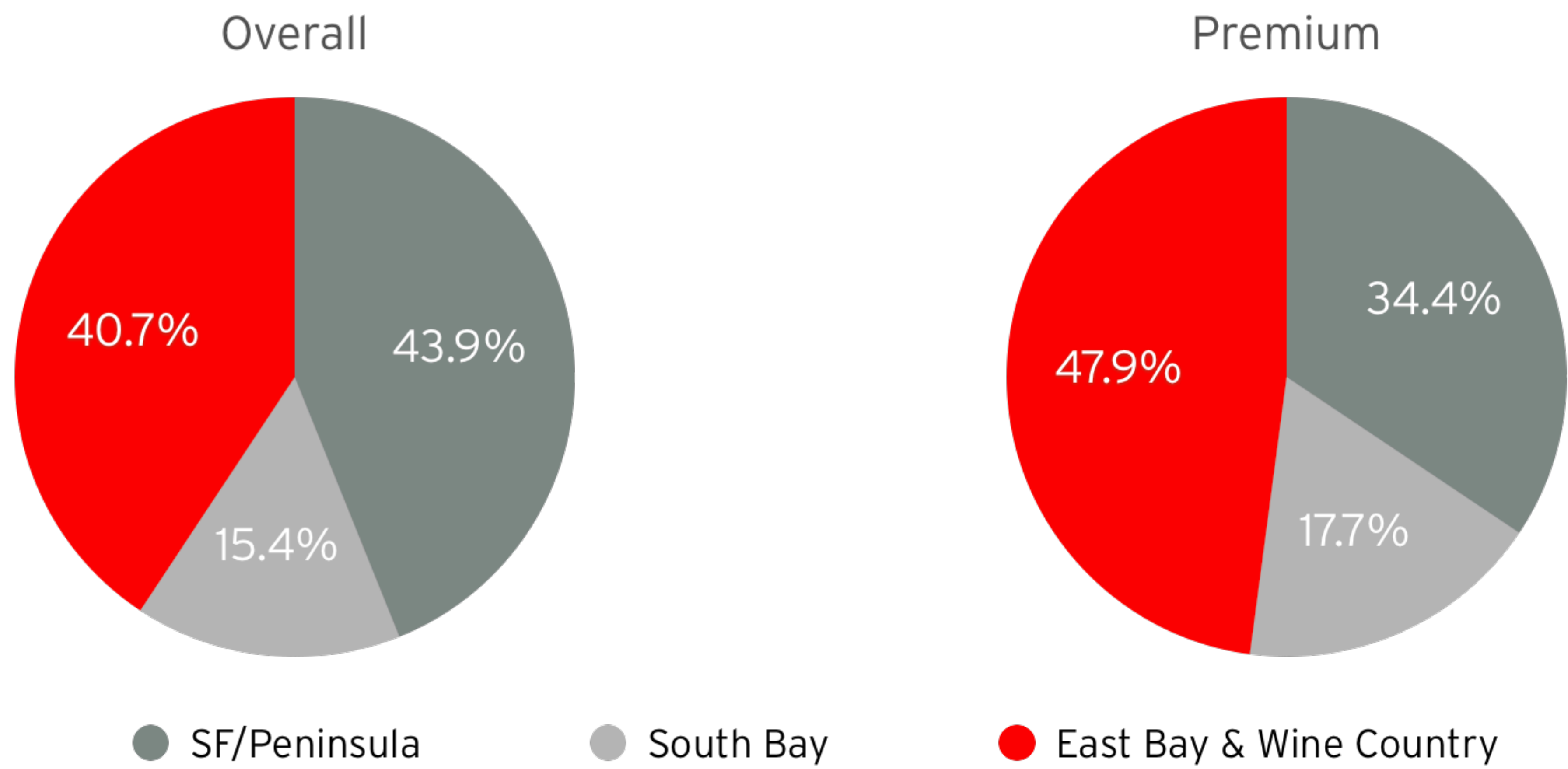
On average the propensity to travel is twice the nationally high Bay Area average

East Bay and Wine Country

Premium Revenue



East Bay originating customers contribute more to premium class cabin traffic than San Francisco and the Peninsula combined



Source: ARC ZIP code data, CR 2015. Premium=all non-discount economy category

# Local Economic Environment 2018



# The San Francisco Bay Area, now globally renown for business and tourism, continues to boom

- ✈ All sectors stable and strong
- ✈ Growing East Bay epicenter emerges
- ✈ Maturity and greater discipline in the venture capital environment means a dampening rather than a severe step down when the boom is over



# “Tech Monoculture” Replaced By “Tech Equity” in the East Bay

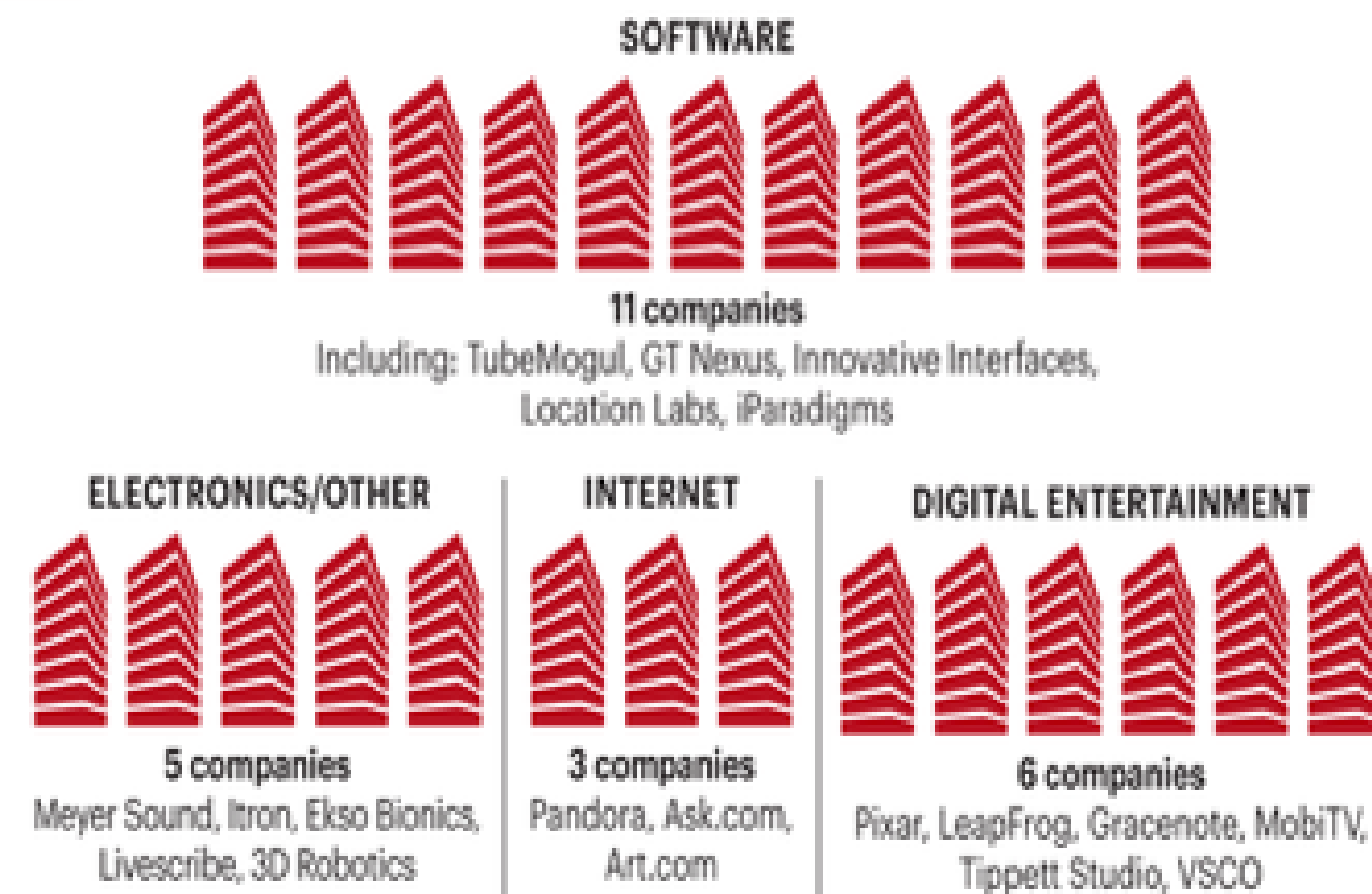


- ✈ **Downtown Oakland booms**
- ✈ More tech companies expected to follow
- ✈ **The Kapor Center** operates at the intersection of technology and racial and social justice. Along with it's sibling organizations, the **Level Playing Field Institute** and **Kapor Capital**, they work from “STEM to Start-up”.



## SOFTWARE RULES THE ROOST

All types of businesses intersect within the East Bay tech ecosystem, from Internet music streaming (Pandora) to loudspeaker manufacturers (Meyer Sound) to drones (3D Robotics), but software companies dominate the List of the 25 biggest employers.



SOURCE: SFBT RESEARCH @SAN FRANCISCO BUSINESS TIMES

- ✈ Tech outgrows the Valley and looks past San Francisco
- ✈ Growth is beyond the traditional strong holds of Sand Hill Road and SF. And it's not just Uber, venture capitalists are looking at the East Bay as a region ripe for tech investment
- ✈ Also expect tech brainpower to spread to cities like San Ramon and Concord
- ✈ Tech is fueled by UC Berkeley



A collage of architectural renderings of modern skyscrapers is overlaid on a map of Oakland, California. The map shows major streets like Market St, Grand Ave, and Jackson St, as well as landmarks like Lake Merritt and Glen Echo Creek. The text "OAKLAND'S WAVE OF 20 NEW TOWERS IS RISING" is prominently displayed in red at the top left. The renderings show various styles of high-rise buildings, some with unique architectural features like cantilevered floors or glass facades. The map also labels areas like "OLD OAKLAND" and "Downtown Oakland".

## West Elm Hotel, 150 rooms join 105 residential units

"We feel right at home in Oakland, a city undergoing tremendous change and growth," said Peter Fowler, vice president of West Elm Hospitality. "Its influences are felt in technology companies, a wonderfully diverse maker culture and art scene, and of course, its pioneering food movement."



# Health Care Management

- ✈ Oakland-based Kaiser Permanente which helped invent managed care and has long been one of the region's most powerful systems now has 10.2 million enrollees
- ✈ They have signed a definitive agreement to acquire the 590,000 enrollee Group Health Cooperative in Seattle
- ✈ Detroit's Henry Ford Health system could be the next target
- ✈ 7,000 Oakland-based employees





- ✈ Blue Shield has signed a 200,000 square-foot lease to occupy a tower in downtown Oakland.
- ✈ The company is relocating 1,200 employees from its current headquarters in San Francisco.
- ✈ One of the biggest office leases in the Oakland city's history.



# Biotech

- ✈ "Breakthrough" is the word you hear. Breakthroughs in Alzheimer's, HIV, and cancer treatment and more
- ✈ Bio tech innovation ripples through the Bay Area
- ✈ The East Bay, already a major player, has the space and the resources for growth
- ✈ The largest in the EB from a growing list

Bio Rad 7,030 employees in Hercules

Bayer 1,500 employees in Berkeley

Novartis 500 employees in Emeryville

# Clif Bar

Founded as an alternative to existing energy food, Clif Bar now boasts over a dozen product lines, including Luna Bar, Clif Kid and Mojo trail mix, and exports to 18 countries across Europe, Asia and Australia. While the privately-held company will not disclose revenue, Clif Bar holds 33 percent of the market share in the health and lifestyle bar category, which is expected to grow to \$6.2 billion by 2018

975 employees in Emeryville.



# Disney Pixar Animation Studios

- ✈ Founded 1979, as a division of LucasFilm. An Apple joint venture owned by Steve Jobs until acquisition by Disney
- ✈ 1,155 staff at the Emeryville studio campus
- ✈ Most recent releases include Inside Out with gross receipts approaching \$1B and The Good Dinosaur released in December 2015 with receipts of \$358M worldwide so far
- ✈ Prefers OAK - talent and staff fly premium.
- ✈ Now playing, Coco



A wide-angle photograph of a modern, multi-story office building with a distinctive stepped, glass-walled facade. The building is flanked by large, mature trees with green and yellowing leaves. In the foreground, a large, circular fountain with multiple tiers of waterfalls is the central focus. The sky is a clear, bright blue. A semi-transparent white circle is overlaid on the center of the image, containing red text.

**OAK**  
is the closest  
and preferred  
airport to  
Bishop Ranch

✈ Located in sunny San Ramon, for more than 30 years, Bishop Ranch has been creating a diverse, dynamic business community that is home to more than 550 companies and growing

**30,000+**

people work  
at the  
campus



The best way to San Francisco Bay.

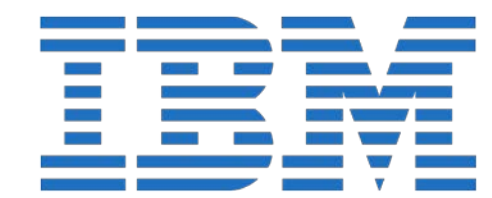


Companies based at Bishop Ranch reflect the scope and diversity in business sectors that balance the East Bay economy

- Fortune 500 companies—such as Chevron, IBM, GE, PG&E, Bank of the West, Toyota, AT&T, Del Monte Food, Robert Half, Ford, and JPMorgan Chase
- Tech and bio-med start-ups—such as Affiliated Computer Services, Aon eSolutions, AGIS Network, Cognizant Technology Solutions; MRT; Systems America, Six Dimensions, and Austral Biologicals



JPMorganChase 



 Robert Half®

A scenic view of Berkeley, California, featuring the prominent Sather Tower (Clock Tower) of the University of California, Berkeley. The tower is a tall, white, Gothic-style structure with a clock face. In the foreground, there are lush green trees and the rooftops of buildings. The background shows a wide view of the city, the San Francisco Bay, and distant hills under a cloudy sky. A semi-transparent white circle is overlaid on the image, containing red text.

**Berkeley**  
is a top  
source of  
traffic for  
**OAK**

# University of California Berkeley

#1

Public University  
in the U.S.

#3

Globally

**Berkeley**  
UNIVERSITY OF CALIFORNIA

**I**  **OAK**  
The best way to San Francisco Bay.

  **OAK**  
Official Airport of Cal Athletics

Berkeley hosts

**1.65**  
**million**

visitors a year from all over the world  
(Researchers & Alumni)

CO-MANAGES

**3**

U.S. National Laboratories with  
the U.S. Department of Energy



# OAK customers

**5,800**

staff at the Lawrence  
Livermore National Laboratory  
in Livermore

**37,000**

students

**31,091**

full time faculty & staff

**9,700**

staff & students at the  
Los Alamos National  
Laboratory in New  
Mexico that supports  
OAK-ABQ

**4,800**

staff & students at the  
Lawrence Berkeley National  
Laboratory in Berkeley



The best way to San Francisco Bay.

# Berkeley is big business

	BERKELEY	WALNUT CREEK	PALO ALTO
Population	201,152	96,352	146,138
Residents 35+	102,935	61,321	73,466
Residents BA+	89,173	42,698	59,151
Income \$75k+	36,493	23,147	30,047

TOTAL SPENDING POWER	
Berkeley	\$4.04 billion annually
Walnut Creek	\$2.07
Palo Alto	\$2.97



**OAK**  
provides excellent  
access to the  
region's tourism  
venues

# Tourism growing and now outpaces business traffic 2016

San Francisco  
welcomed

**25.2  
million**  
visitors

**2.8%**

increase  
from 2015

# Napa Valley and Sonoma County 2016

## SONOMA COUNTY




Graton Casino & Hotel  
contributing to growth in Sonoma

## NAPA VALLEY



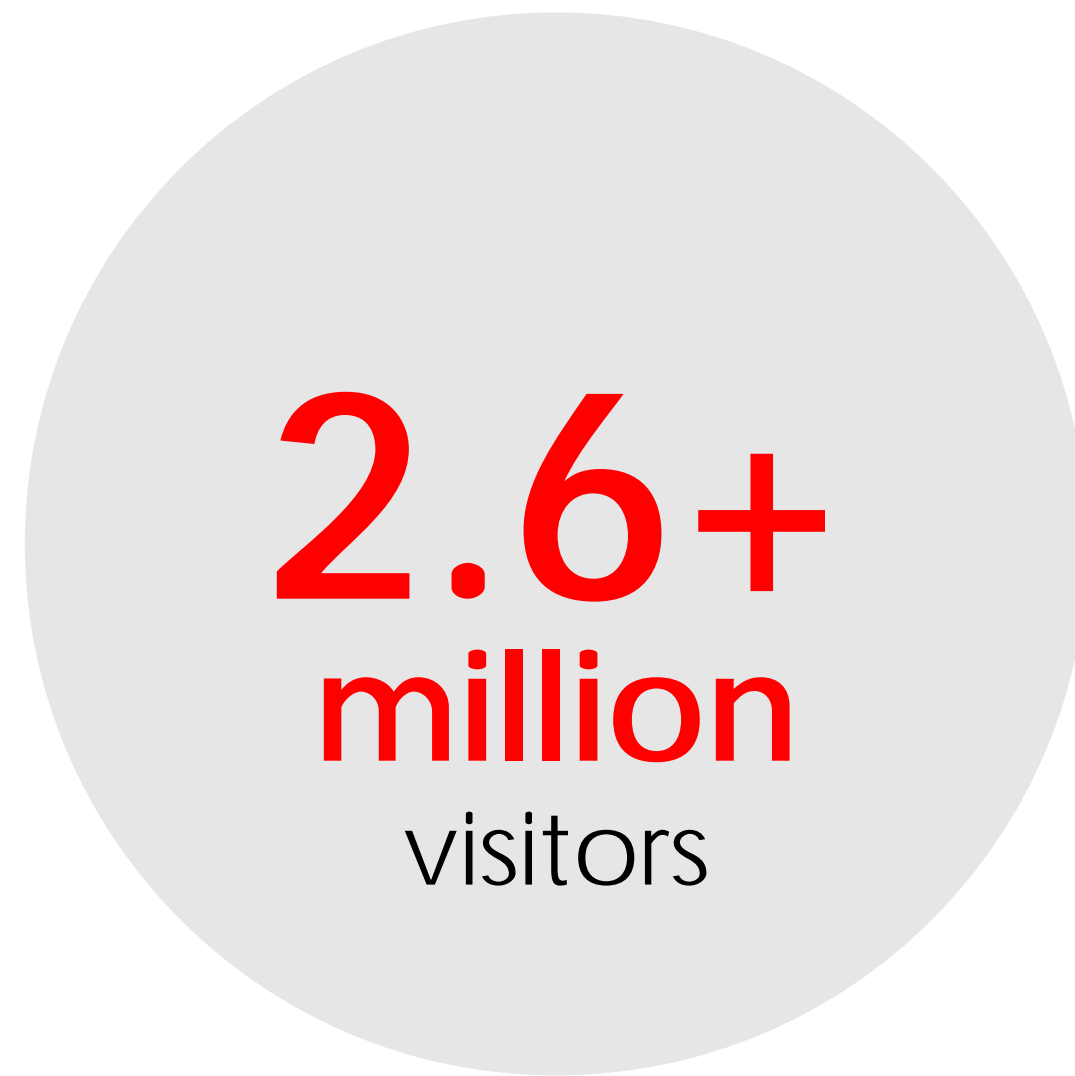
# Wine Country, Open for Business





**OAK**  
is the **closest**  
**major airport**  
to Napa and  
Sonoma  
Counties

# Oakland Tourism Breaks All Records



estimated to have  
increased by 80% in 2015



annual visitor  
spend

“The coolest new kid on  
the block is Oakland,”

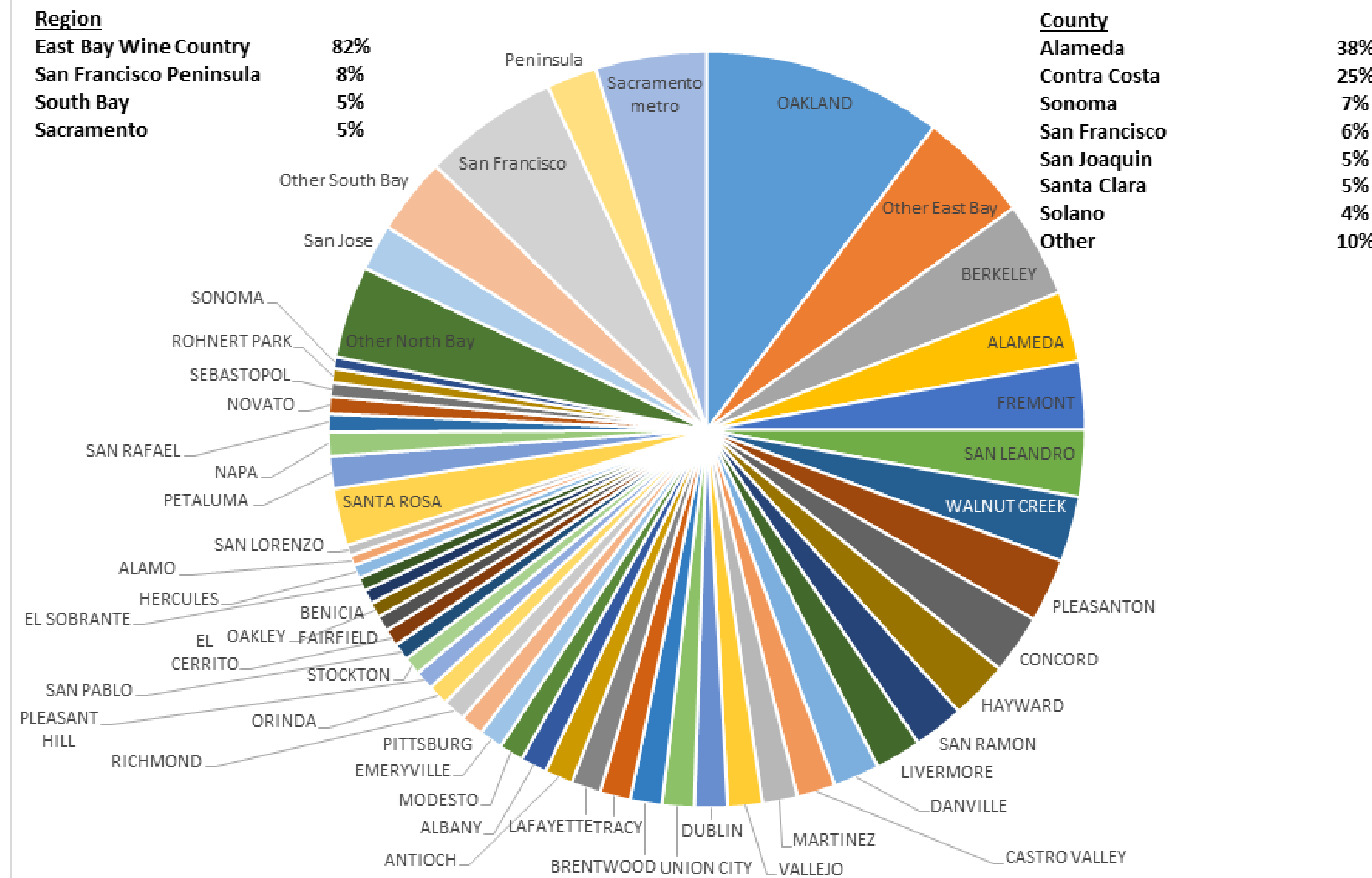
-Huffington Post



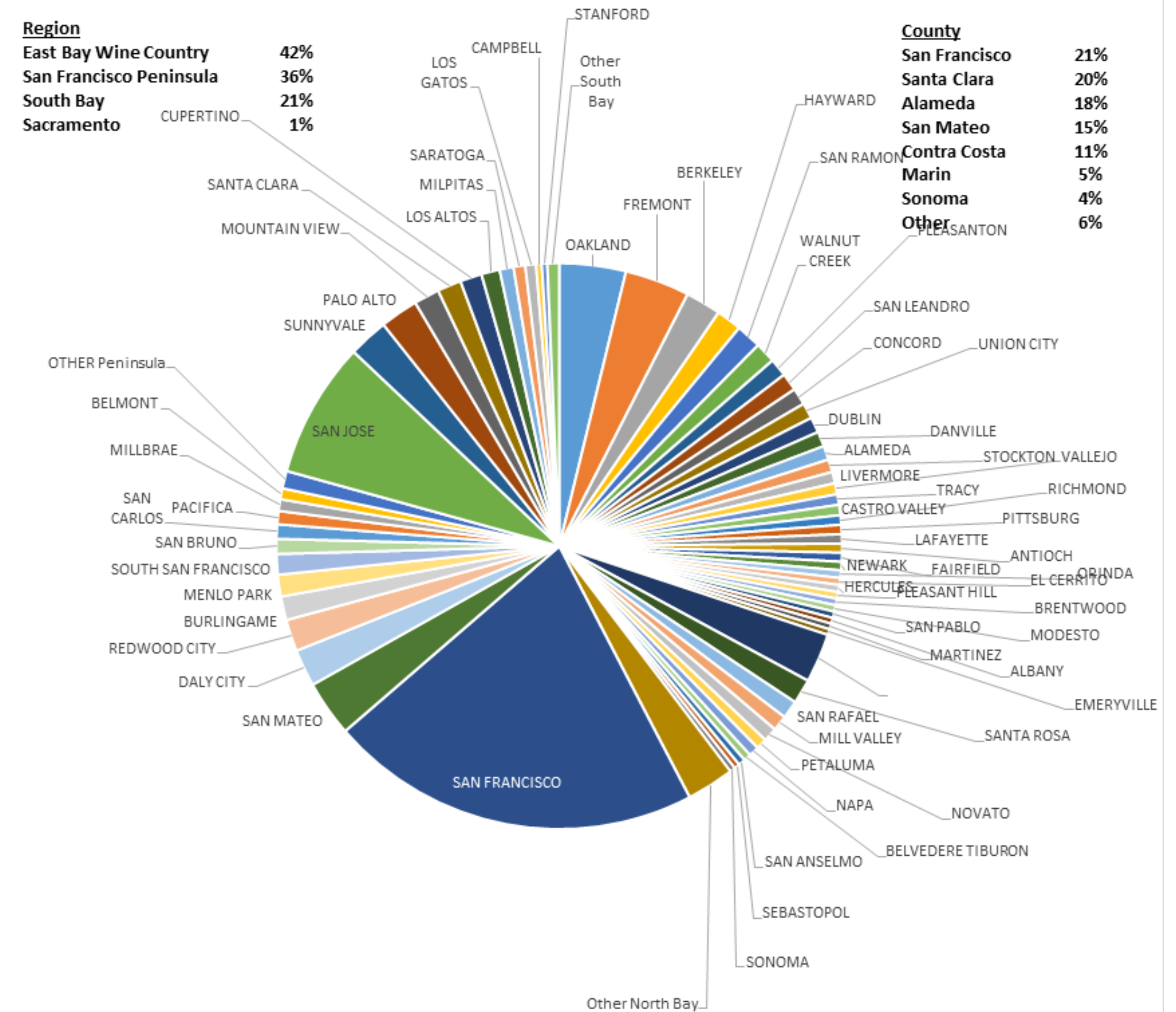
# OAK Originating Traffic Composition Study

## Zip Code Level

OAK Point of Sale, Mar-Apr 2017 (ARC data)



SFO Point of Sale, Mar-Apr 2017 (ARC Data)



THANK YOU

*Going away and coming home*  
**Oakland International Airport**  
*Fly The East Bay Way*

OAKLAND  
INTERNATIONAL  
AIRPORT **I** ✈ **OAK**