Capturing the Power of the East Bay

Routes Americas 2022 – San Antonio
Bay Area traffic recovery favors OAK

Monthly Change in Passengers vs. 2019

Source: 1/ Oakland International Airport; 2/ San Francisco International Airport; 3/ San Jose International; April 2019 – October 2021
San Francisco Bay Area population at a glance

Note: This illustration includes 7 counties (also including San Joaquin county) to derive 5 million inhabitants vs. 4.2 million of 6 counties (ref. previous slide)
Source: Woods & Poole, 2020 population (est.)
OAK's catchment has the largest share of Bay Area international demand

**Bay Area: International Demand Adjusted to Catchment Area**

- **OAK**: 6,673,777
- **SFO**: 3,877,724
- **SJC**: 4,783,806

**Bay Area: International Demand Share Adjusted to Catchment Area**

- **OAK**: 43.5%
- **SJC**: 31.2%
- **SFO**: 25.3%

Source: InterVISTAS Consulting Analysis using (1) MIDT Global Demand Data (GDD) via Sabre, CY 2019 (Final) and (2) ARC, CY 2019
OAK's catchment has the largest share of Bay Area domestic demand

Bay Area: Domestic Demand
Adjusted to Catchment Area

OAK: 25,604,614
SFO: 22,693,285
SJC: 15,585,541

Bay Area Domestic Demand Share
Adjusted to Catchment Area

OAK 36.9%
SFO 34.3%
SJC 28.8%

Source: InterVISTAS Consulting Analysis using [1] MIDT Global Demand Data (GDD) via Sabre, CY 2019 (Final) and [2] ARC, CY 2019
5 out of 10 of the largest Bay Area employers are located in the East Bay

1. Kaiser
2. Sutter Health
3. Facebook
4. Safeway
5. Tesla
6. Wells Fargo & Co,
7. Genentech
8. Salesforce
9. Allied Universal
10. PG&E

Source: https://www.bizjournals.com/sanfrancisco/subscriber-only/2021/07/16/largest-bay-area-employers.html?print
**TECH**
- Twitter: more than 550
- Zendesk: 3,570
- Workday: 4,565
- Pixar: 1,165

**FINTECH**
- Square: 547
- Lendup: 250
- Marqeta: 563
- Mosaic: 171
- Intuit - Credit Karma: 1,300

**BIOTECH**
- Biorad: 7,030
- Bayer: 1,500
- Novartis/ Grifols: 500

**HEALTHCARE (Non-Hospital)**
- Kaiser Permanente: 7,000
- Blue Shield: 1,200

Not only is most of the population in the East Bay; so are most of the wealthy households

<table>
<thead>
<tr>
<th>Bay Area Wealth</th>
<th>Household Income USD150K+</th>
<th>Household Income USD200k+</th>
</tr>
</thead>
<tbody>
<tr>
<td>East Bay &amp; Wine Country</td>
<td>312,528</td>
<td>162,860</td>
</tr>
<tr>
<td>San Francisco</td>
<td>162,492</td>
<td>98,148</td>
</tr>
<tr>
<td>San Jose</td>
<td>135,461</td>
<td>119,536</td>
</tr>
</tbody>
</table>

Note: East Bay encompasses ‘East Bay & Wine Country’, using 7 counties
Source: Woods & Poole, 2020 population and income (est.)
Business drives OAK demand
A wave of migration from San Francisco has made Oakland one of the hottest local economies in the country.

Downtown Oakland Jobs Current: 80,000 + 20,000 by 2022 = 100,000
New Alameda County residential units online in 2022 = 50,000

"The skyline’s going to be totally reimagined, The perception of Oakland has changed."

- The San Francisco Chronicle
TRI-VALLEY IS RISING

200 new companies have moved into the Tri Valley since the pandemic began

BISHOP RANCH

- OAK is the closest and preferred airport to Bishop Ranch
- Bishop Ranch is home to over 550 companies and 30K employees work there.

California’s largest corporation, Chevron
Visitors learn quickly what those living here know: OAK is the, “home airport” and, under comparable circumstances, will always choose to fly OAK first.