

Item 2

**SLO County Regional Airport Update
Mike Manchak, EVC President & CEO
Economic Vitality Corporation**

**Presentation by the
San Luis Obispo Economic Vitality Corporation**



Sixel Consulting Group, Inc.

Business Travel Survey Results

The San Luis Obispo Market

San Luis Obispo County Regional Airport
June 2009





Business Travel Survey

Sixel Consulting Group, Inc.

- Executive Summary
- Top Underserved Destinations
- Select Business Travel Profiles



San Luis Obispo County Regional Airport
Agenda Item #02-Page 2 of 23



Beyond DOT Data: Determining Demand

Sixel Consulting Group, Inc.



- The San Luis Obispo County Regional Airport commissioned a survey of its business community, to delve into the untapped travel patterns of major air service users.
- A total of 2,022 respondents took the survey over the course of an eight week period from the end of April 2009 to the middle of June.
- Survey data helps the Airport determine demand for cities not currently served by airlines in SLO – creating a clearer picture of where future air service development efforts should be focused.

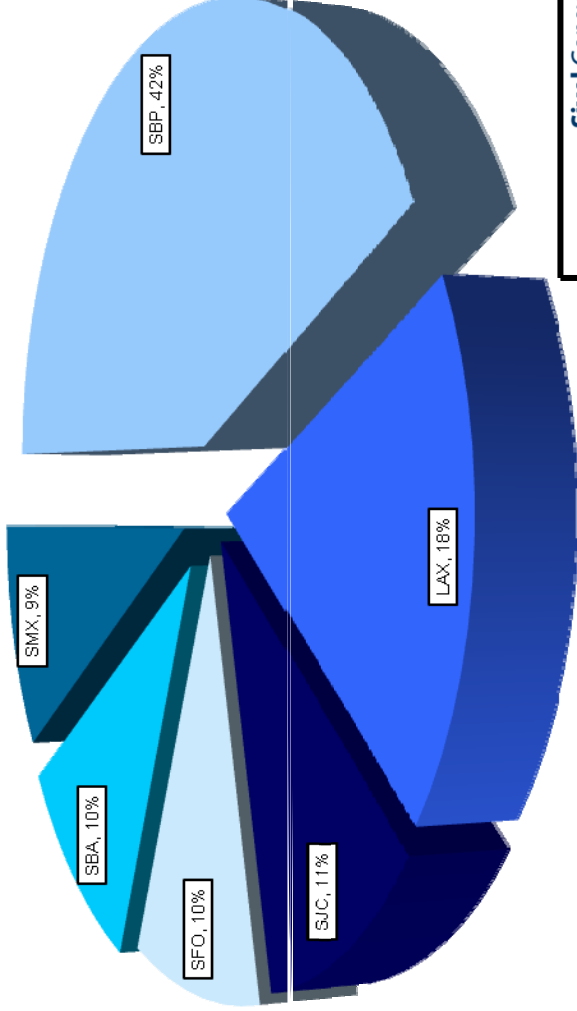




58% of SLO Travelers Use Other Airports

Sixel Consulting Group, Inc.

Which Airport Do You Most Frequently Use?



Sixel Consulting Group, Inc.	Responses	Percentage
San Luis Obispo County Regional Airport (SBP)	978	42%
Los Angeles International (LAX)	424	18%
San Jose International (SJC)	247	11%
San Francisco International (SFO)	224	10%
Santa Barbara Municipal Airport (SBA)	226	10%
Santa Maria Airport (SMX)	214	9%

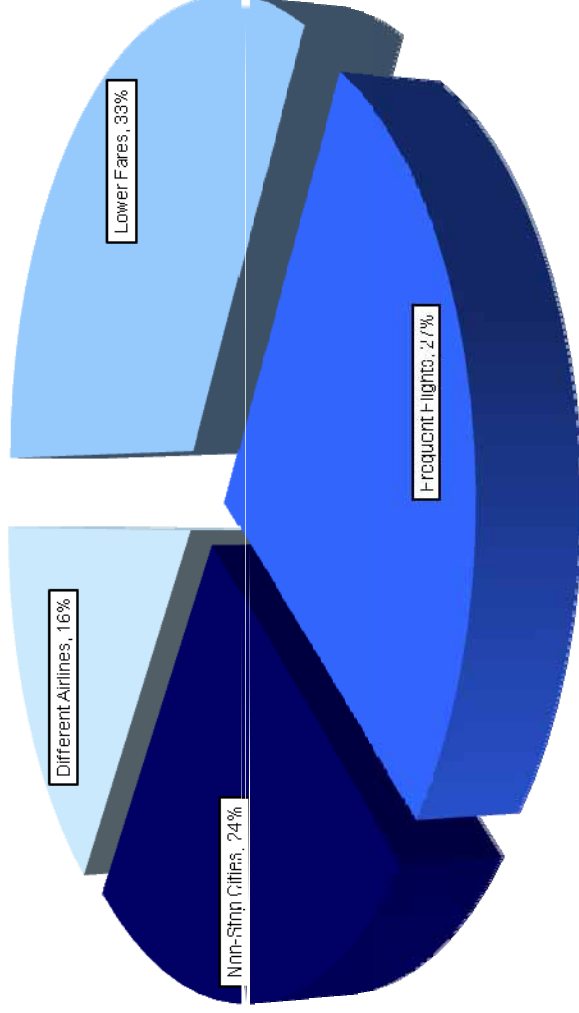




51% Use Other Airports for More Flights to More Cities

Sixel Consulting Group, Inc.

Why Do You Use Other Airports, Besides SBP?



Sixel Consulting Group, Inc.		Responses	Percentage
Lower Fares	699	33%	
More Frequent Flights	578	27%	
More Non-Stop Destinations	500	24%	
Different Airlines	330	16%	

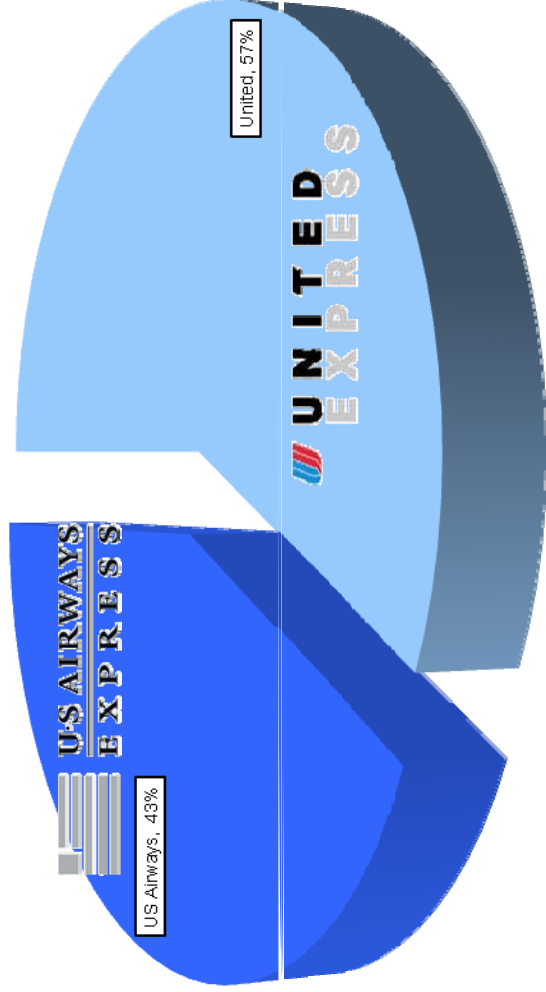




57% of Respondents Use United Express Most

Sixel Consulting Group, Inc.

Which Airline Do You Most Frequently Use at SBP?



Sixel Consulting Group, Inc.		
	Responses	Percentage
United Express	708	57%
US Airways Express	532	43%

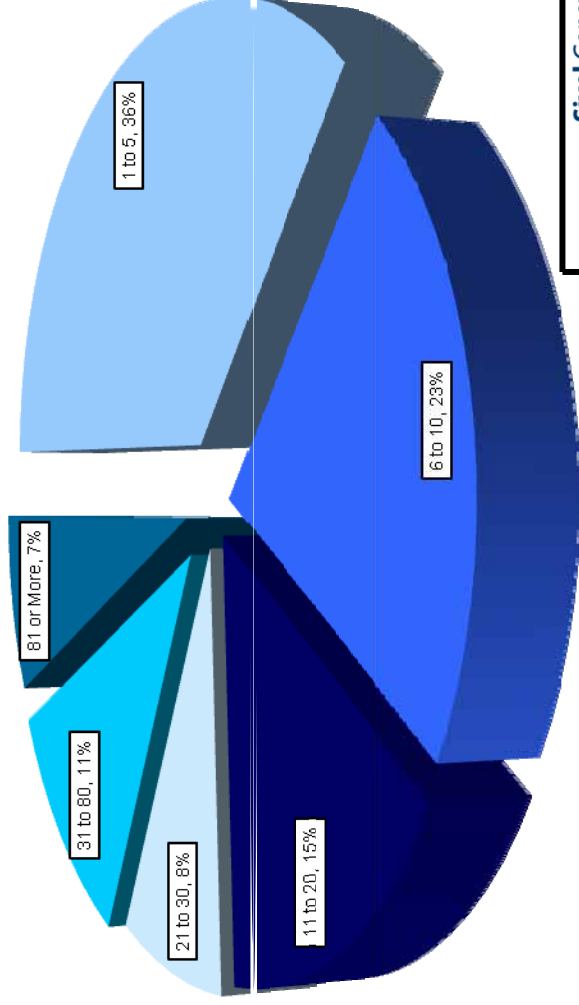




83 Respondents Take 81 or More Trips a Year

Sixel Consulting Group, Inc.

How Many Trips a Year Does Your Company Take from the SLO Office?



Sixel Consulting Group, Inc.	Responses	Percentage
One to Five	412	36%
Six to Ten	262	23%
11 to 20	178	15%
21 to 30	91	8%
31 to 80	123	11%
81 or More	83	7%

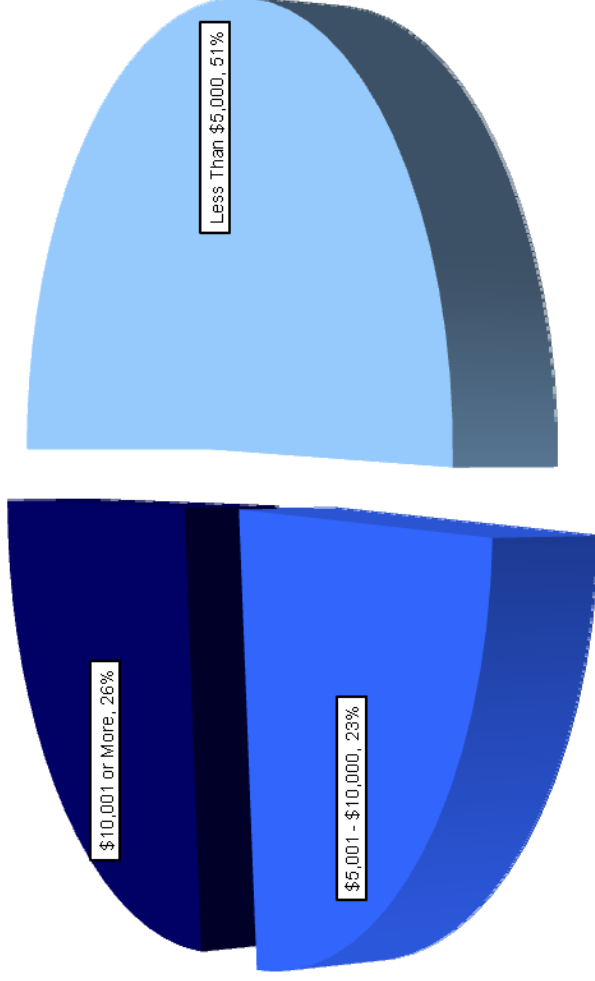




536 SLO Companies Spend \$5,000+ on Travel

Sixel Consulting Group, Inc.

What is Your Company's Annual Air Travel Budget?



Sixel Consulting Group, Inc.		Responses	Percentage
Less Than \$5,000		548	51%
\$5,001 - \$10,000		251	23%
\$10,001 or More		285	26%

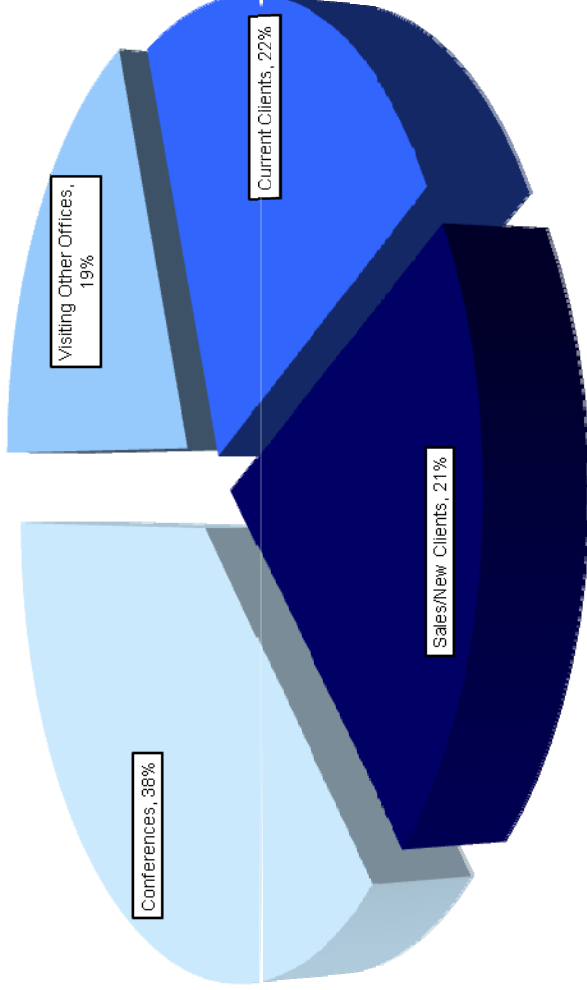




38% of SLO Business Trips Are to Conferences

Sixel Consulting Group, Inc.

Describe the Nature of Your Business Trips.



Sixel Consulting Group, Inc.	Responses	Percentage
Visiting Other Company Offices	366	19%
Calling on Current Clients	419	22%
Sales Calls to New/Potential Clients	397	21%
Conferences	712	38%

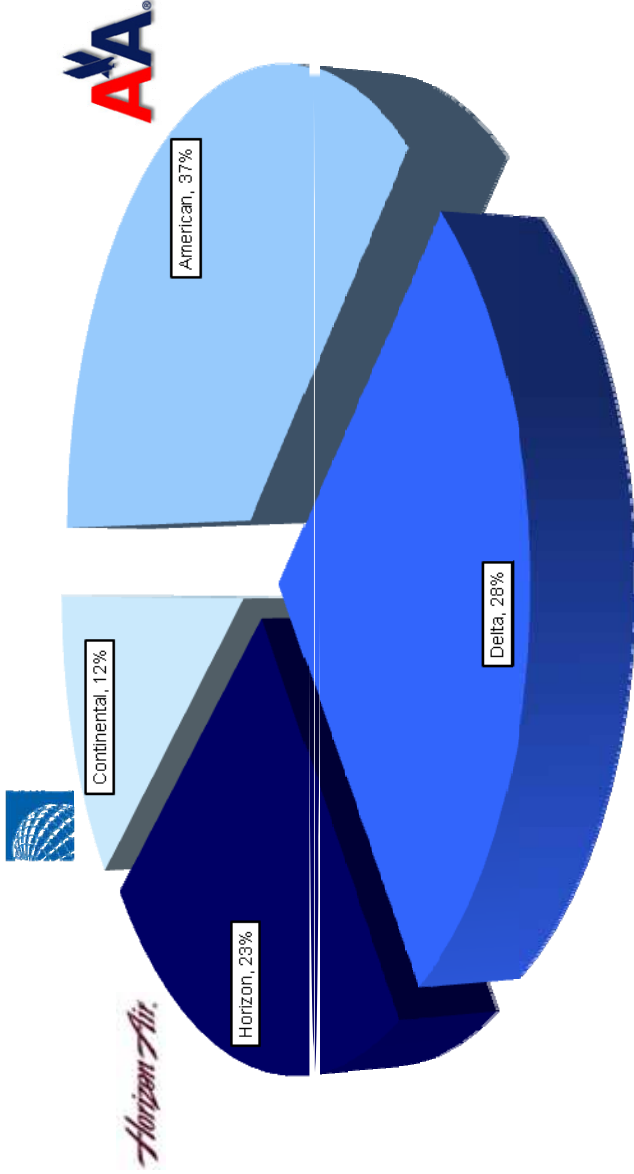




Most Respondents Would Like to See AA or DL Return

Sixel Consulting Group, Inc.

Which New Airline Would You Most Like to See at SBP?



Sixel Consulting Group, Inc.	Responses	Percentage
American Airlines/American Eagle	661	37%
Delta Air Lines/Delta Connection	504	28%
Horizon Air/Alaska Airlines	417	23%
Continental Airlines/Continental Connection	211	12%

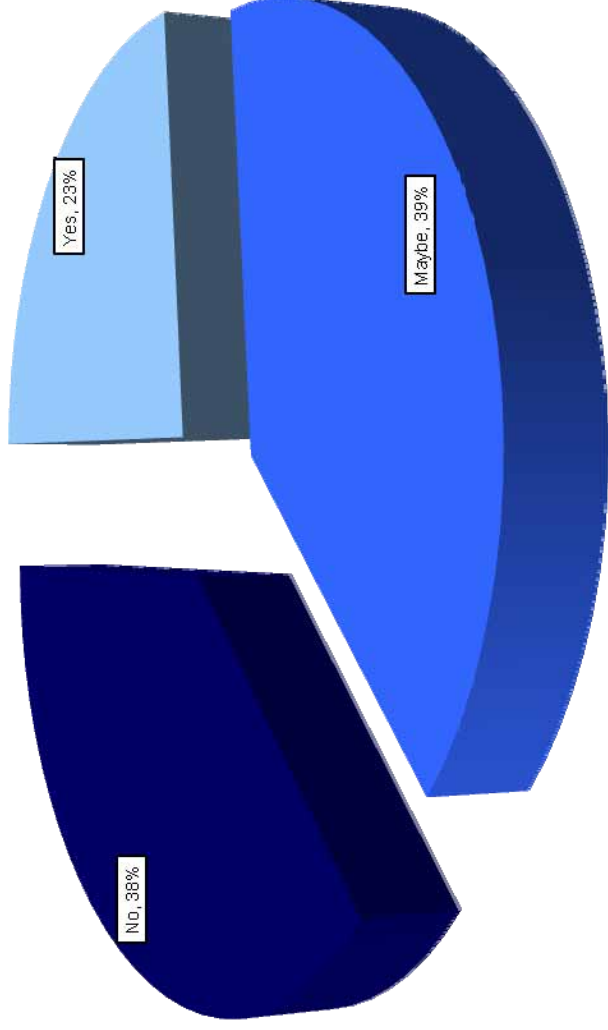




62% of SLO Businesses Will Consider a Pledge

Sixel Consulting Group, Inc.

Would You Be Willing to Pledge Part of Your Travel Budget to New Service?



Sixel Consulting Group, Inc.		
	Responses	Percentage
Yes	235	23%
Maybe	386	39%
No	380	38%





Sixel Consulting Group, Inc.

Top Underserved Destinations



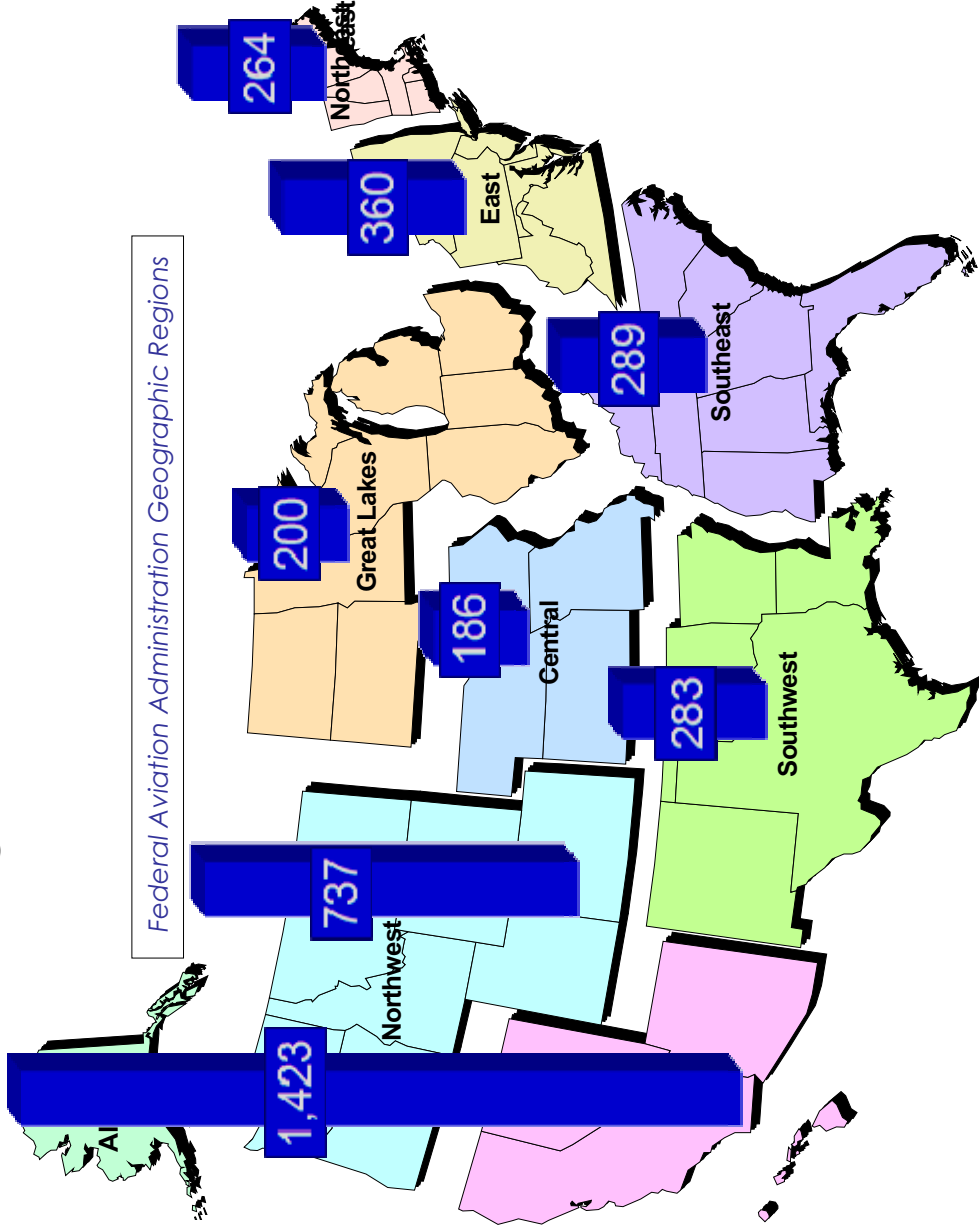
San Luis Obispo County Regional Airport
Agenda Item #02 Page 100 of 23



The Majority of Respondents Travel to CA, NV, & AZ

Sixel Consulting Group, Inc.

To What Regions Do You Most Frequently Travel?

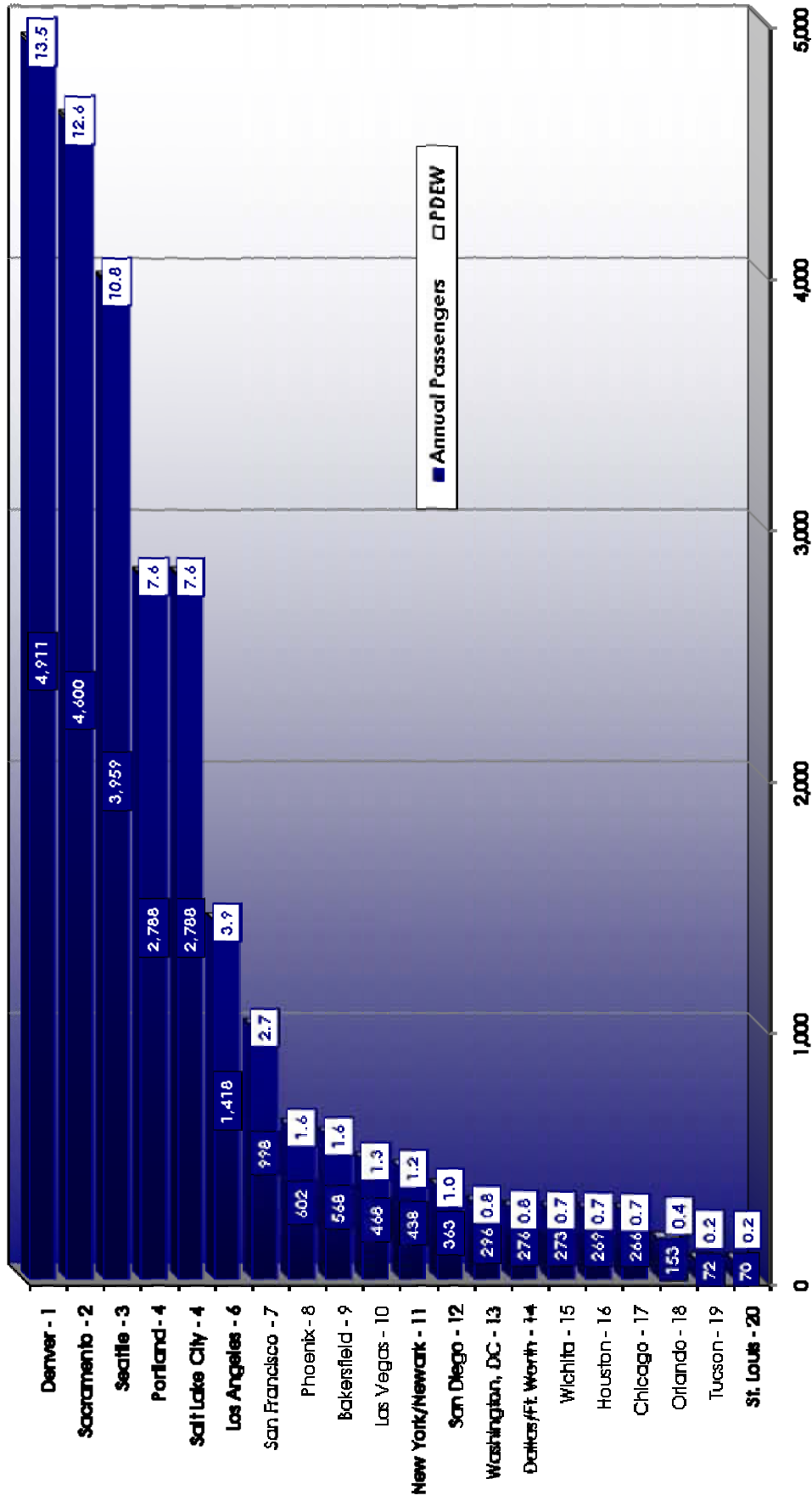




Respondents Rank DEN #1 and SMF #2

Sixel Consulting Group, Inc.

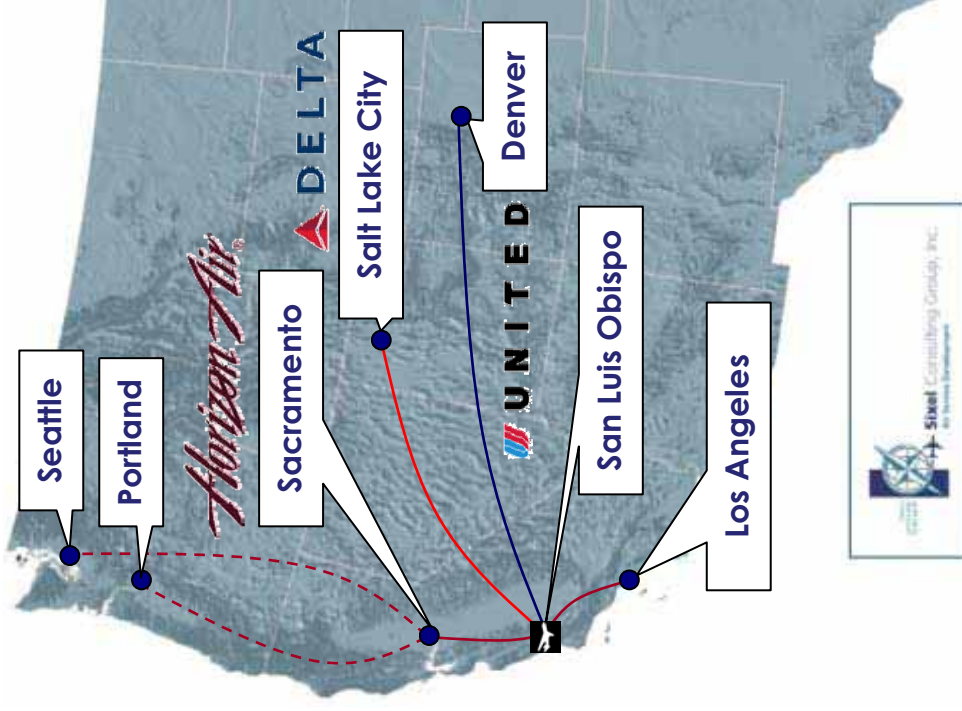
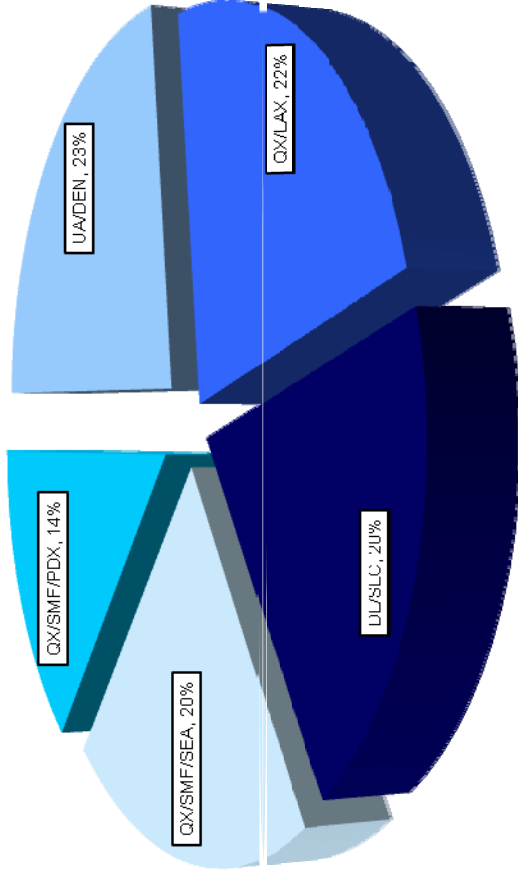
Top 20 O&D Passengers Markets from San Luis Obispo as Indicated By Survey Respondents





Top New Airline/Route Combinations

Sixel Consulting Group, Inc.



Sixel Consulting Group, Inc.			
	Responses	Percentage	
United Express to Denver	456	23%	
Horizon Air to Los Angeles	436	22%	
Delta Connection to Salt Lake City	400	20%	
Horizon Air to Sacramento and Seattle	397	20%	
Horizon Air to Sacramento and Portland	280	14%	

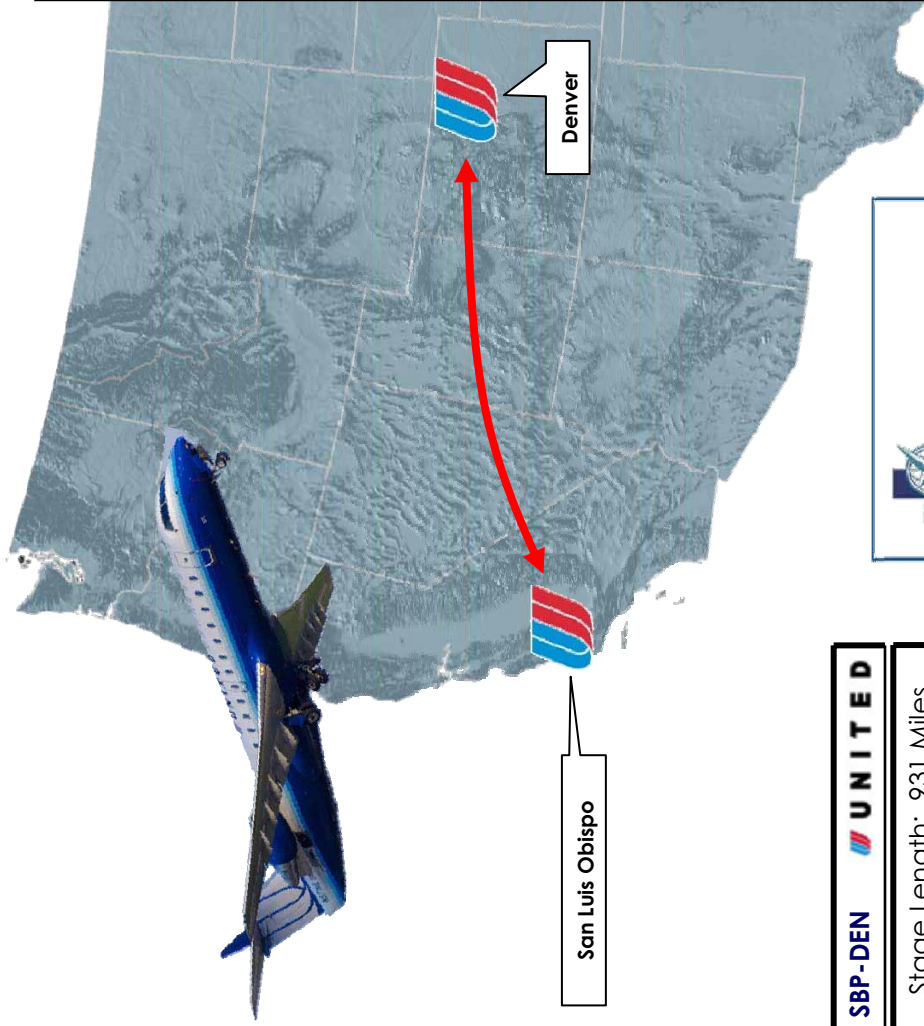


San Luis Obispo County Regional Airport
June 2009



San Luis Obispo – Denver Demand

Sixel Consulting Group, Inc.



SBP-DEN	UNITED
Stage Length: 931 Miles	
Estimated Flight Time: 1:56	



San Luis Obispo's Business Travel Survey has found **many common linkages between SLO and Denver**, including:

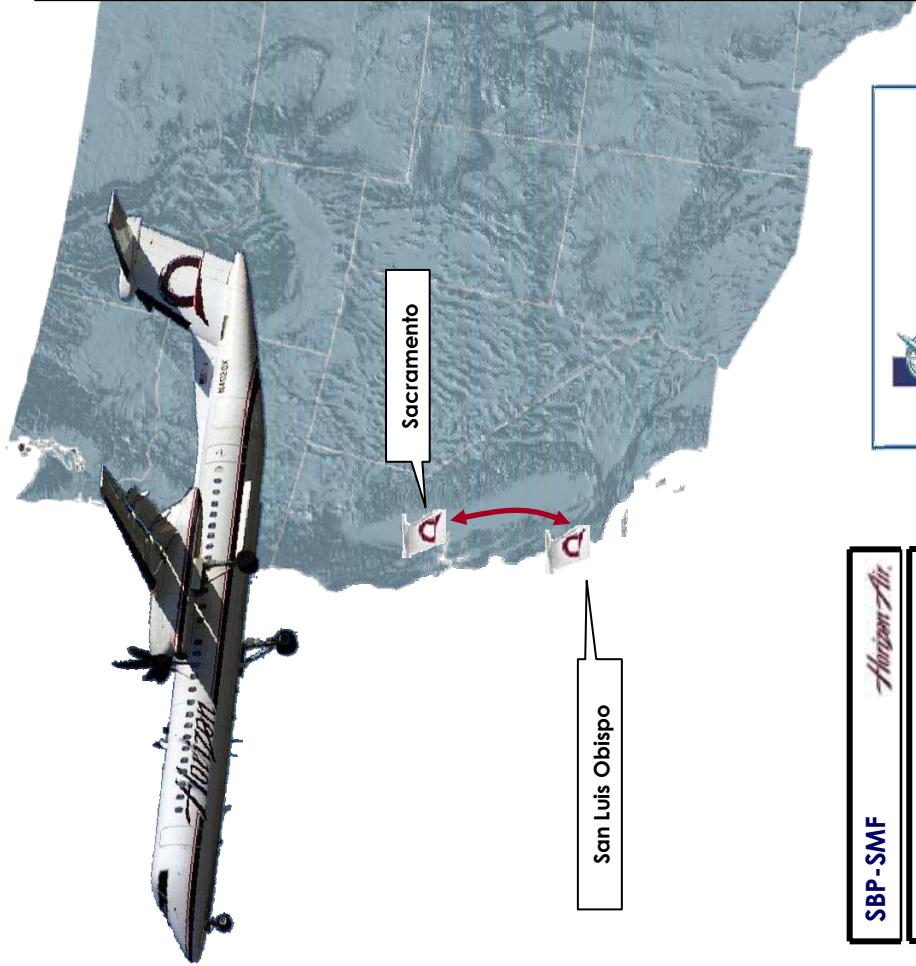
- **33 Businesses co-located**, with offices in both SLO and Denver, including:
 - Lockheed Martin
 - ConocoPhillips Company
 - Mountain West Conference
 - TW Telecom
 - Xcelle, Inc.
 - GJ Gardner Homes
 - Onings
 - Cannon
 - Andre, Morris, & Buttery
 - Sunset Foods, LLC
 - Spader
 - AD Alternatives
 - American General Media
 - Rapid ID
 - Doculynx
 - The Golf Agency Marketing
 - Adelaida Cellars
 - Vina Robles
 - The Parable Group
 - Cohen & Company
 - Lacey Livestock
 - Perceptual Alignment
 - KHJ Designs
 - Newark Electronics
 - Molnycke Healthcare
 - Affinity Partners, LLC
- **4,911 Annual origin and destination roundtrips** taken by respondents between SLO and Denver
- **13.5 O&D PDEW** between SLO and Denver





San Luis Obispo – Sacramento Demand

Sixel Consulting Group, Inc.



SBP-SMF	<i>Horizon Air</i>
Stage Length:	244 Miles
Estimated Flight Time:	0:36



San Luis Obispo's Business Travel Survey has found **many common linkages between SLO and Sacramento**, including:

- 62 Businesses co-located**, with offices in both SLO and Sacramento, including:
 - Meridian Pacific
 - Vanir Construction Management
 - California School Boards Association
 - Downey Brand, LLC
 - State of California
 - Regional Water Board
 - California Integrated Waste Management
 - California Highway Patrol
 - Caltrans
 - Concessio
 - Spader
 - Mission Community Services Corporation
 - Diringer and Associates
 - Cal Poly
 - Ram Enterprises
 - Great Outdoors Construction
 - NEST Environmental Services
 - AT&T
 - Pearce Services
 - Paso Robles Wine Country Alliance
 - Roxo Port Cellars
 - Intel
 - EPI-USE Labs
 - California Men's Colony
 - California Space Authority
 - PG & E
- 4,600 Annual origin and destination roundtrips** taken by respondents between SLO and Sacramento
- 12.6 O&D PDEW** between SLO and Sacramento

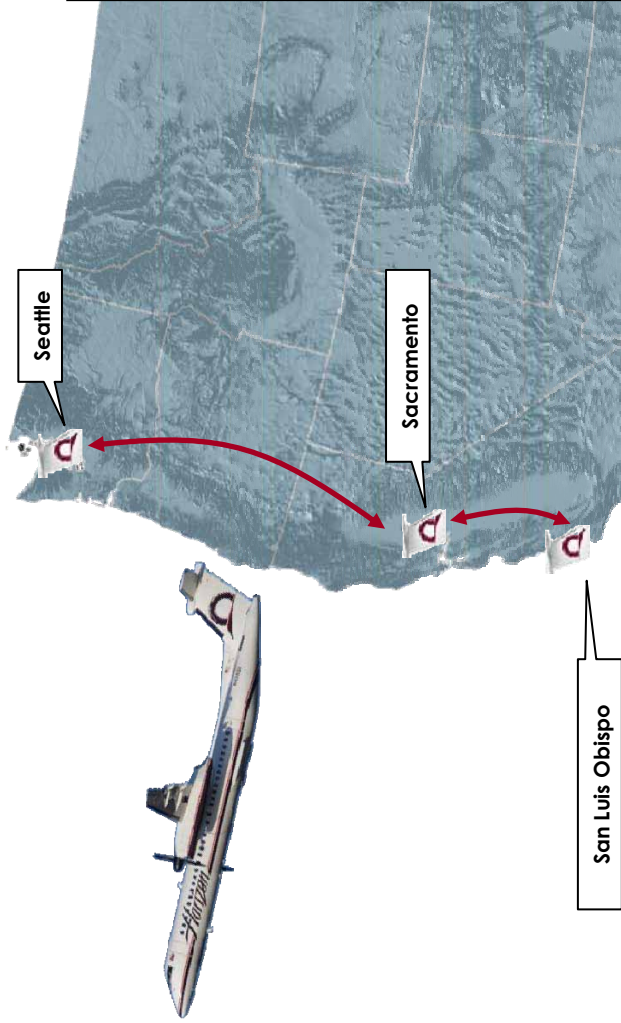


San Luis Obispo County Regional Airport
June 2009



San Luis Obispo – Seattle Demand

Sixel Consulting Group, Inc.



SBP-SMF-SEA	<i>Horizon Air</i>
Stage Length:	244 Miles
Estimated Flight Time:	0:36
Stage Length:	605 Miles
Estimated Flight Time:	1:30



San Luis Obispo's Business Travel Survey has found **many common linkages between SLO and Seattle**, including:

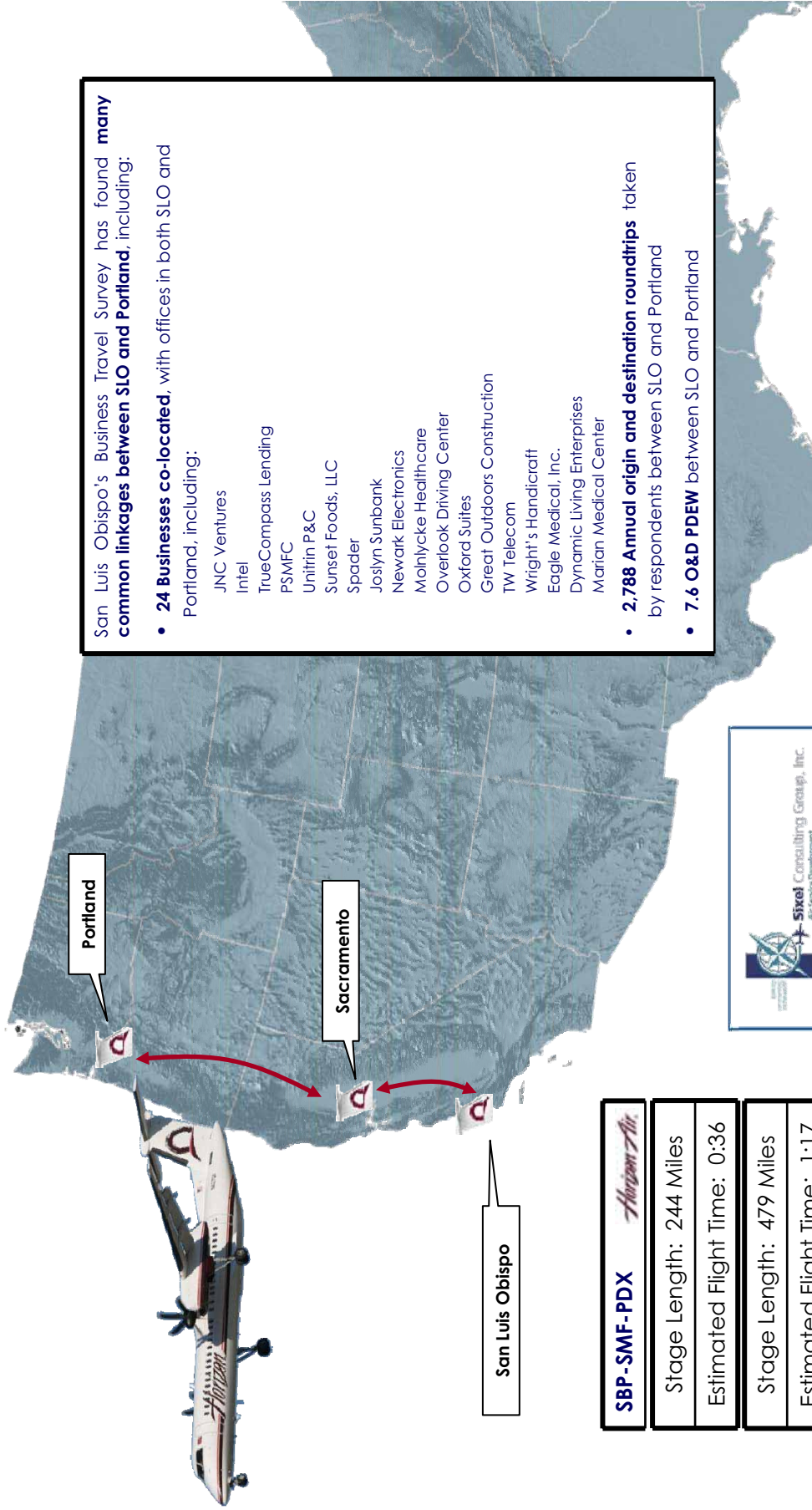
- 25 Businesses co-located**, with offices in both SLO and Seattle, including:
 - Pacific Stevedoring, Inc.
 - Anderson & Middleton Company
 - Reisner McEwen & Associates
 - Brown's General Office, Inc.
 - Concessio
 - Sunset Foods, LLC
 - Spader
 - Joslyn Sunbank
 - Empirical Systems Aerospace
 - Great Outdoors Construction
 - Vanir Construction Management
 - ConocoPhillips Company
 - JAR, LLC
 - Thatcher Winery
 - MINDBODY, Inc.
 - Meridian Pacific
 - Equity Corporate Housing
 - TW Telecom
 - Xcelle, Inc.
 - Reisner, McEwen, and Associates
 - AeroMech Engineering
 - Clayhouse Wines
- 3,959 Annual origin and destination roundtrips** taken by respondents between SLO and Seattle
- 10.8 O&D PDEW** between SLO and Seattle





San Luis Obispo – Portland Demand

Sixel Consulting Group, Inc.



San Luis Obispo's Business Travel Survey has found **many common linkages between SLO and Portland**, including:

- **24 Businesses co-located**, with offices in both SLO and Portland, including:

- JNC Ventures
- Intel
- TrueCompass Lending
- PSMFC
- Unitrin P&C
- Sunset Foods, LLC
- Spader
- Joslyn Sunbank
- Newark Electronics
- Mohlycke Healthcare
- Overlook Driving Center
- Oxford Suites
- Great Outdoors Construction
- TW Telecom
- Wright's Handicraft
- Eagle Medical, Inc.
- Dynamic Living Enterprises
- Marian Medical Center

- **2,788 Annual origin and destination roundtrips** taken by respondents between SLO and Portland

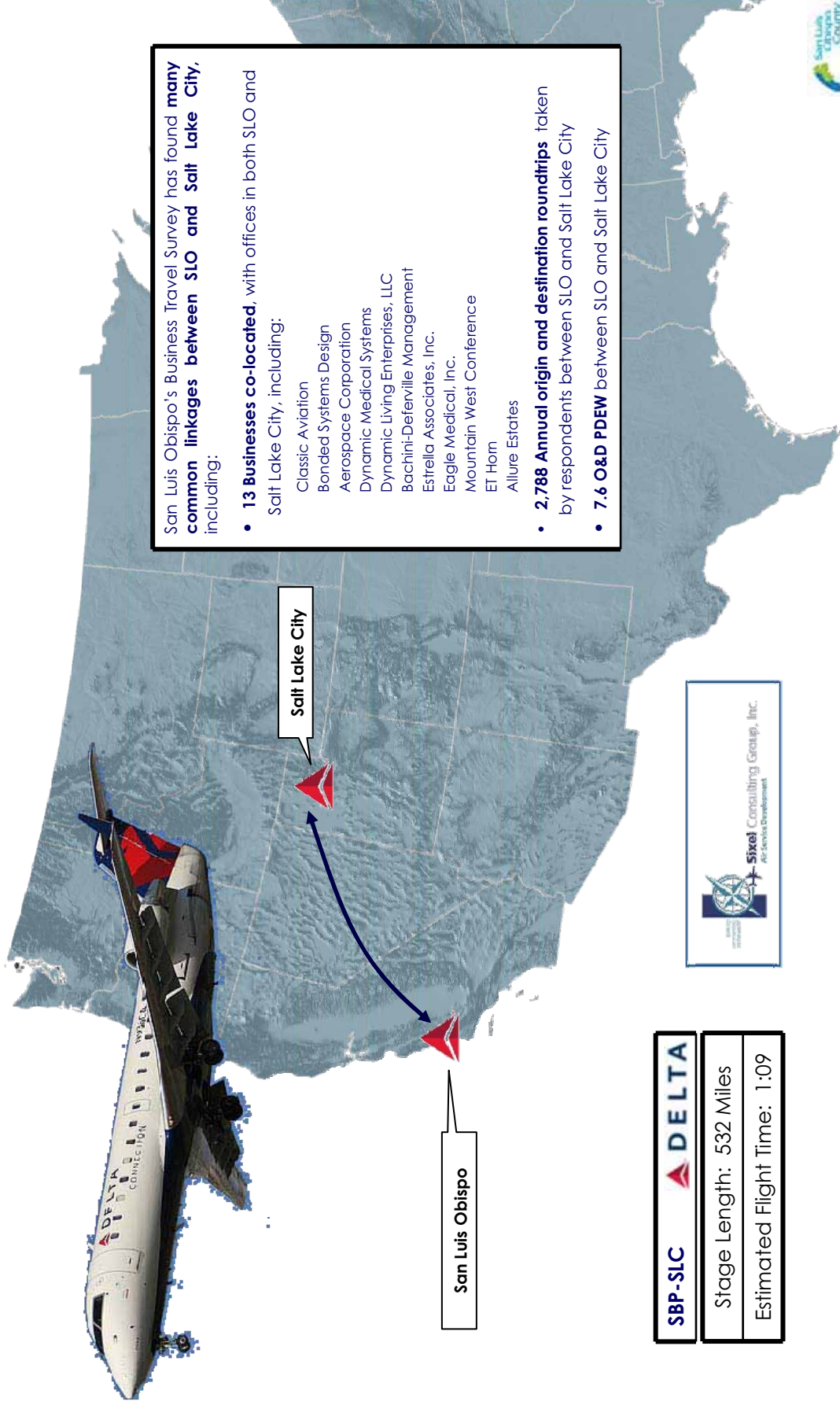
- **7.6 O&D PDEW** between SLO and Portland





San Luis Obispo – Salt Lake City Demand

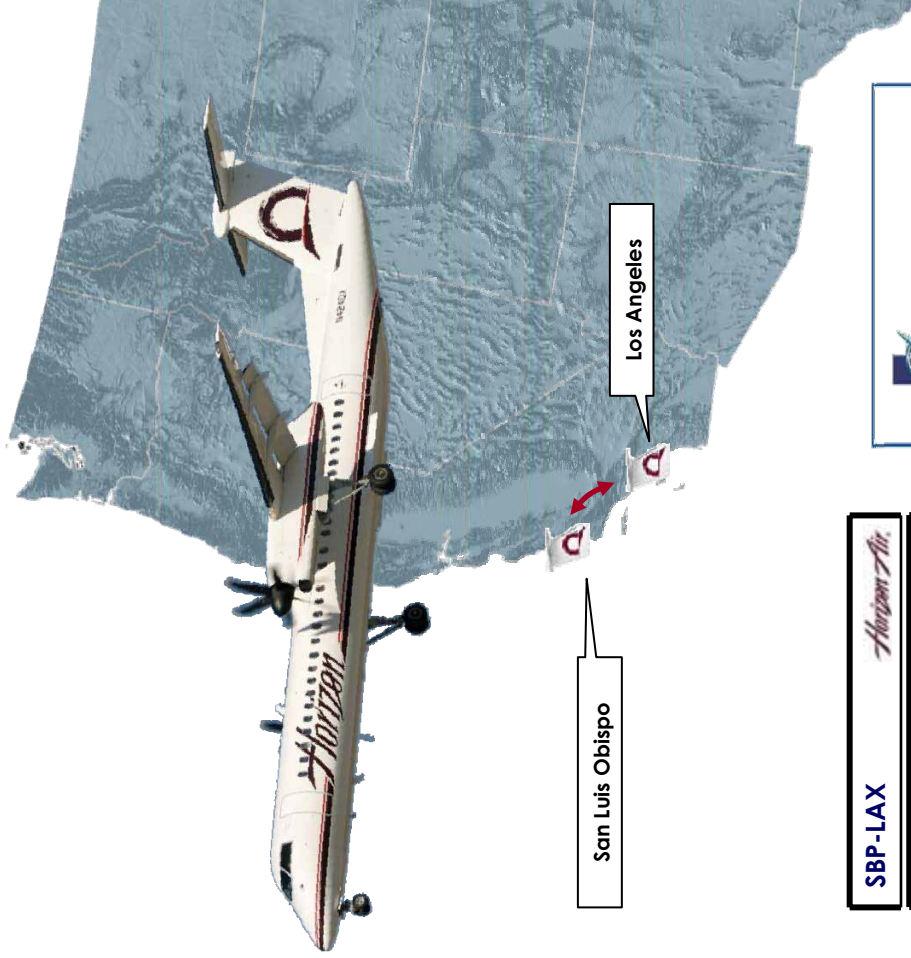
Sixel Consulting Group, Inc.





San Luis Obispo – Los Angeles Demand

Sixel Consulting Group, Inc.



San Luis Obispo

Los Angeles

SBP-LAX	<i>Horizon Air</i>
Stage Length:	156 Miles
Estimated Flight Time:	0:27



San Luis Obispo's Business Travel Survey has found **many common linkages between SLO and Los Angeles**, including:

- 42 Businesses co-located**, with offices in both SLO and Los Angeles, including:
 - Quinn Company
 - Southern California Gas Company
 - Alltown
 - Embassy Suites Hotels
 - Goldman, Magdalin, & Krikes
 - Sunset Mortgage and Investment
 - Concessio
 - Cannon
 - The Golf Agency Marketing
 - Mission Community Services Corporation
 - IAI Presentations, Inc.
 - American General Media
 - Whitecap Construction Supply
 - Cal Poly
 - Dahlen Associates
 - Central Coast of California Hospitals
 - Gunn Broadcast Advertising
 - Herman Properties
 - Chandler Interiors
 - Paso Robles Wine Country Alliance
 - Specialty Silicone Fabricators
 - Sylvester Vineyards and Winery
 - California Integrated Waste Management
 - The Wine Wrangler
 - Charter Communications
 - State Compensation Insurance Fund
- 1,418 Annual origin and destination roundtrips** taken by respondents between SLO and Los Angeles
- 3.9 O&D PDEW** between SLO and Los Angeles



San Luis Obispo County Regional Airport
June 2009



Sixel Consulting Group, Inc.

Jack Penning

Director of Market Analysis
Sixel Consulting Group

jack@sixelconsulting.com

(503) 515-3972

sixelconsulting.com

