

✓ OUR NEW BRAND

✓ WHAT WE'VE LEARNED

- ✓ THE REALITY OF CENTRAL ILLINOIS CONSUMER BEHAVIOR
- ✓ OPERATIONAL PERFORMANCE
- ✓ ECONOMIC IMPACT

✓ SUPPORTING AND DEVELOPING AIR SERVICE

- ✓ CURRENT SERVICE
- ✓ OUR TARGETS
- ✓ COMMUNITY COALITION

✓ OTHER STRATEGIC GOALS

- ✓ TASK FORCE RECOMMENDATIONS

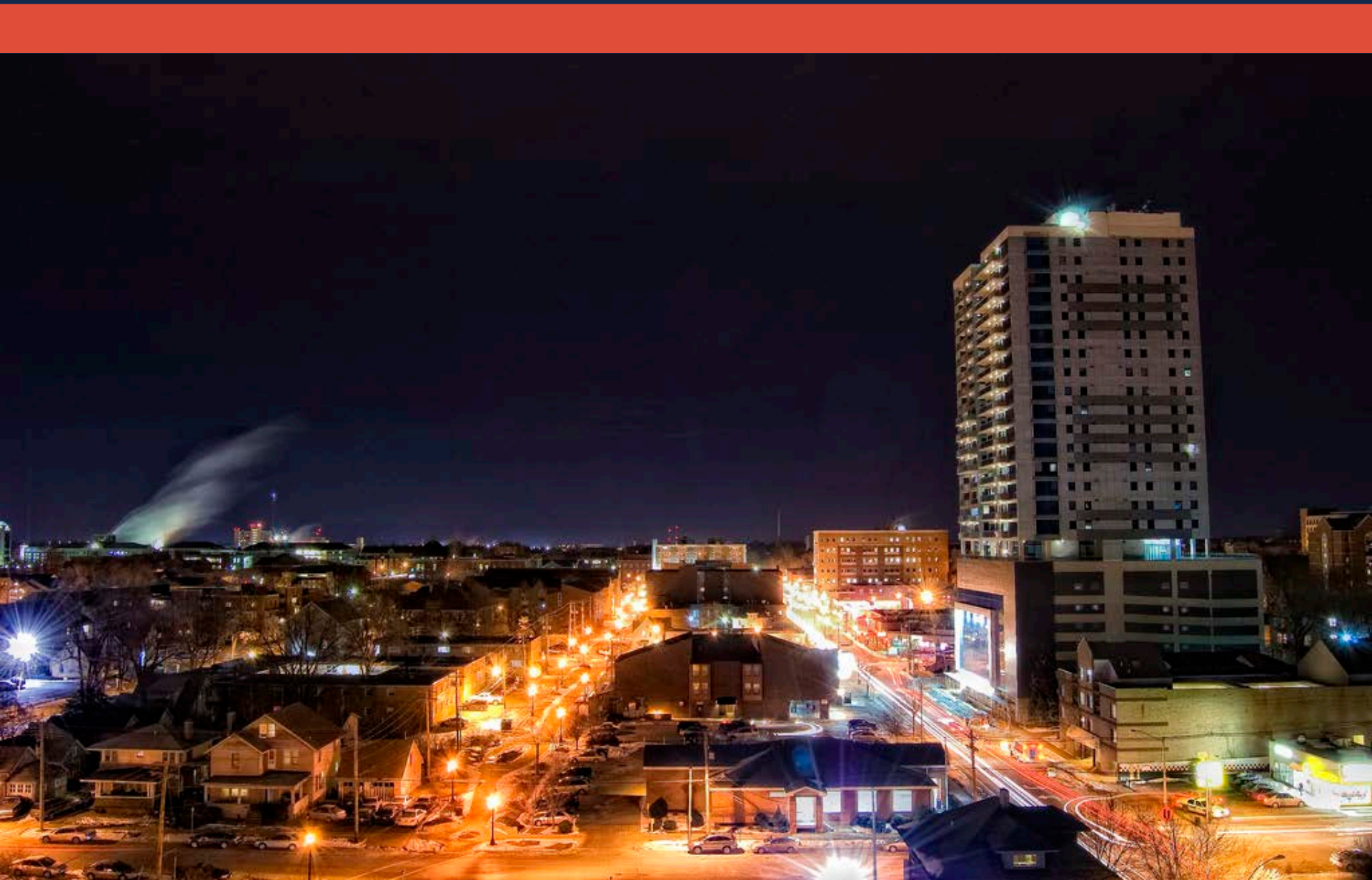
THE NEW "FLY CHAMPAIGN-URBANA" BRAND IS ALIGNED TO THE LOOK AND FEEL OF THE UNIVERSITY, WITH A SLEEK, SIMPLE MESSAGE

**FLY** CHAMPAIGN  
URBANA

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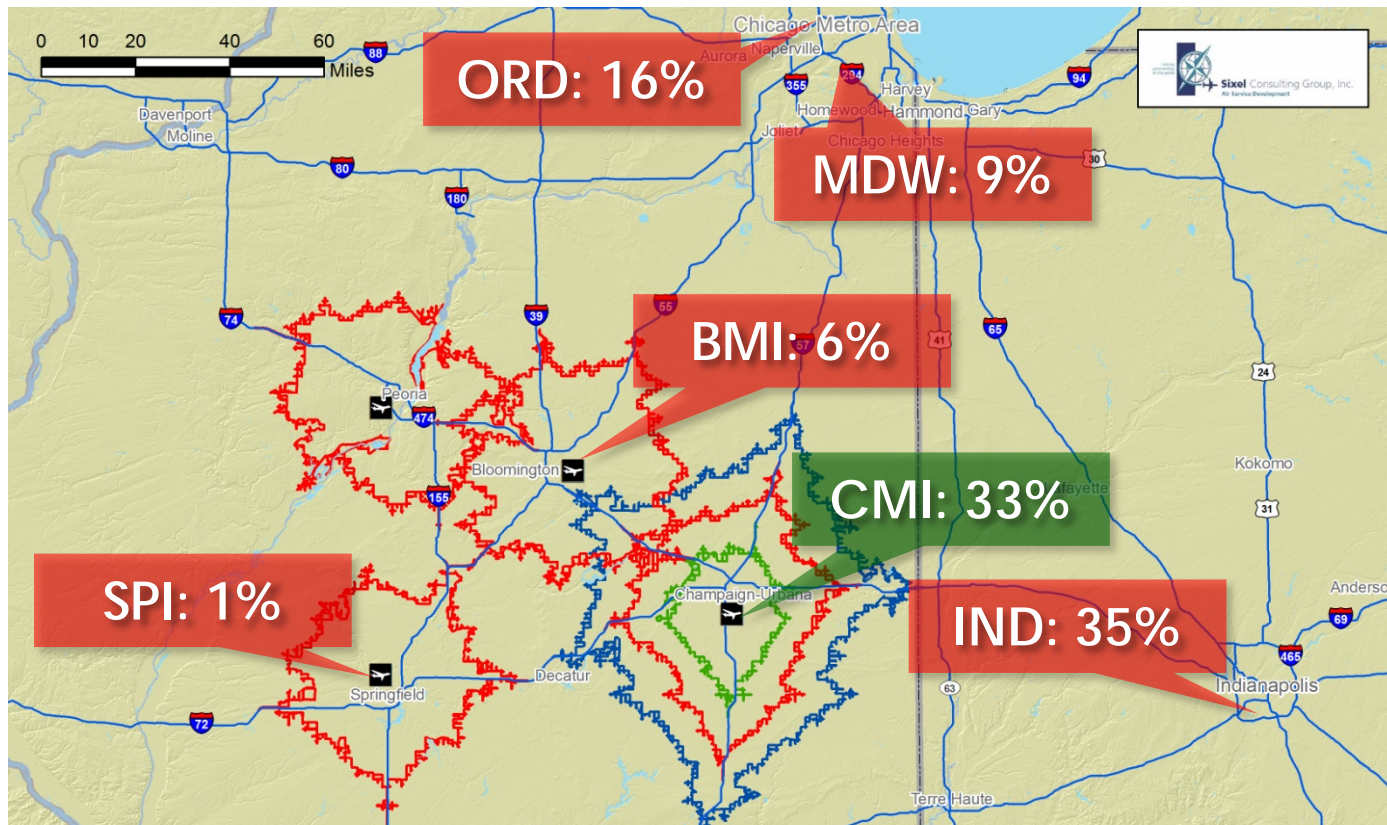
UNIVERSITY OF ILLINOIS - WILLARD AIRPORT

C-U... ON THE BEACH  
C-U... IN DALLAS - WITH DAILY NON-STOPS  
C-U... IN NEW YORK CITY  
C-U... IN EUROPE - WITH DAILY ONE-STOPS





DATA COMPILED SHOWS THAT FREE PARKING DOES NOT IMPACT TRAVELERS, AS ONLY 6% CHOOSE TO FLY FROM BLOOMINGTON



33% OF CHAMPAIGN COUNTY PASSENGERS USE CMI  
60% USE AIRPORTS IN CHICAGO AND INDIANAPOLIS  
PEOPLE PAY MORE FOR PARKING AT THOSE AIRPORTS

Source: Champaign/Urbana True Market Study; Sixel Consulting Group

60 minutes

# OPERATIONAL RELIABILITY IS BETTER THAN PERCEIVED, WITH 75% OF FLIGHTS OPERATING ON-TIME AND A SMALL AVERAGE DELAY

## DEPARTMENT OF TRANSPORTATION ON-TIME STATISTICS

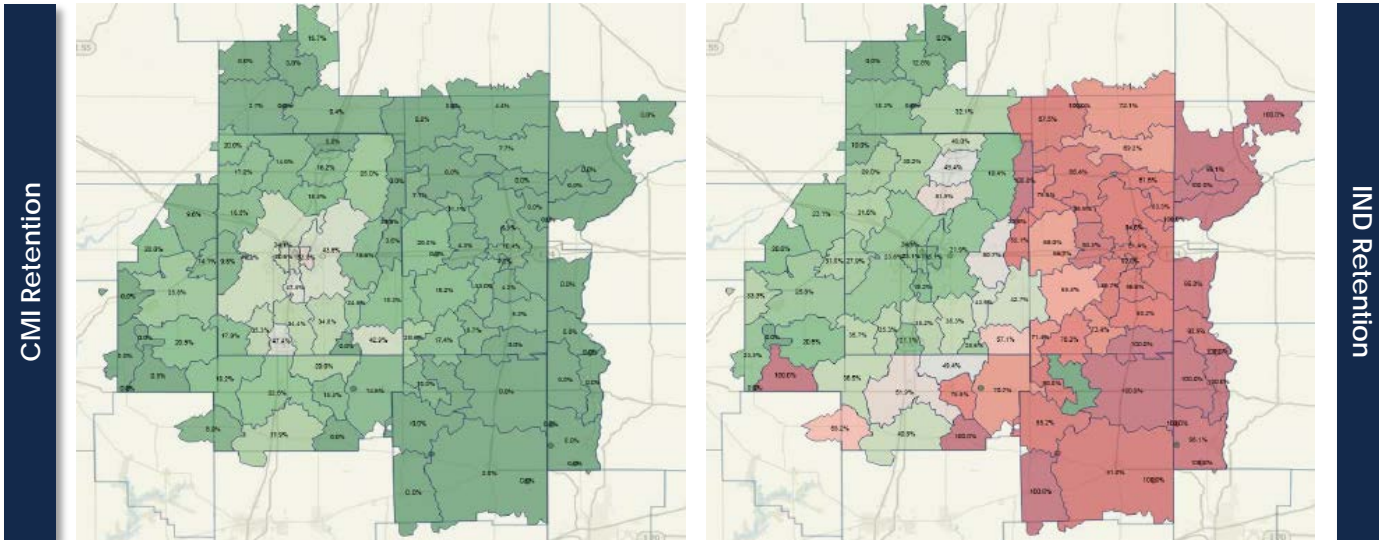
January - NOVEMBER 2014 (LATEST MONTH AVAILABLE)

Carriers	All Flights				Total Number Cancelled	Percent Flights Cancelled	Total Number Diverted	Percent Flights Diverted	Percent Flights Late
	Total Number	Average Departure Delay (minutes)	Average Taxi-Out (minutes)	Average Scheduled Departure to Take-off (minutes)					
ALL*	2,208	11.89	12.66	24.55	125	5.66	7	0.32	18.93
MQ	2,208	11.89	12.66	24.55	125	5.66	7	0.32	18.93

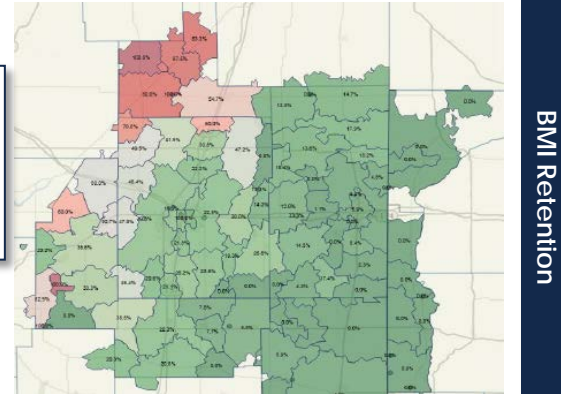
- ✓ JUST 18.9% OF CHAMPAIGN-URBANA FLIGHTS ARE DELAYED
- ✓ OF THOSE FLIGHTS, AVERAGE DELAY = 24.6 MINUTES
- ✓ 75% OF FLIGHTS OPERATE ON-TIME

# HEAT MAPS SHOW WHICH AIRPORTS DO WELL IN OUR PRIMARY MARKET AREA - BMI IS NOT STRONG IN CHAMPAIGN-URBANA

## PASSENGER RETENTION BY AIRPORT SIXEL CONSULTING GROUP CMI TRUE MARKET STUDY



 FEW IN C-U USE BMI  
 CMI RETAINS IN IMMEDIATE AREA  
 IND DRAWS FROM EAST



# CHAMPAIGN-URBANA OFFERS LOW COSTS TO AIRLINES, AND GENERATES MORE REVENUE PER PASSENGER THAN OTHERS

## AIRPORT COST PER ENPLANEMENT AND REVENUE PER ENPLANEMENT

SIXEL CONSULTING GROUP AND FAA FORM 127

### Cost per Enplanement

#### Fiscal Year 2013

Non-Hub Airport Average:	\$8.58
Willard Airport:	\$4.89

### Peer Airports (Ranked by Enplanements)

Peoria, IL (PIA)	\$3.19
Bloomington/Normal, IL (BMI)	\$1.89
Lansing, MI (LAN)	\$15.69
Rochester, MN (RST)	\$4.68
San Luis Obispo, CA (SBP)	\$6.29
State College, PA (SCE)	\$6.31
Springfield, IL (SPI)	\$1.77

Source: FAA Form 127

### Revenue per Enplanement

#### Fiscal Year 2013

Willard Airport:	\$10.28
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### Peer Airports (Ranked by Enplanements)

Peoria, IL (PIA)	\$4.74
Bloomington/Normal, IL (BMI)	\$4.45
Lansing, MI (LAN)	\$11.23
Rochester, MN (RST)	\$4.94
San Luis Obispo, CA (SBP)	\$11.40
State College, PA (SCE)	\$8.17
Springfield, IL (SPI)	\$10.77

Source: FAA Form 127



# CMI GENERATES MORE THAN \$102 MILLION IN ANNUAL ECONOMIC IMPACT FOR THE CHAMPAIGN-URBANA METRO AREA

ECONOMIC IMPACT OF UNIVERSITY OF ILLINOIS - WILLARD AIRPORT  
STATE OF ILLINOIS DIVISION OF AVIATION, CALENDAR YEAR 2012

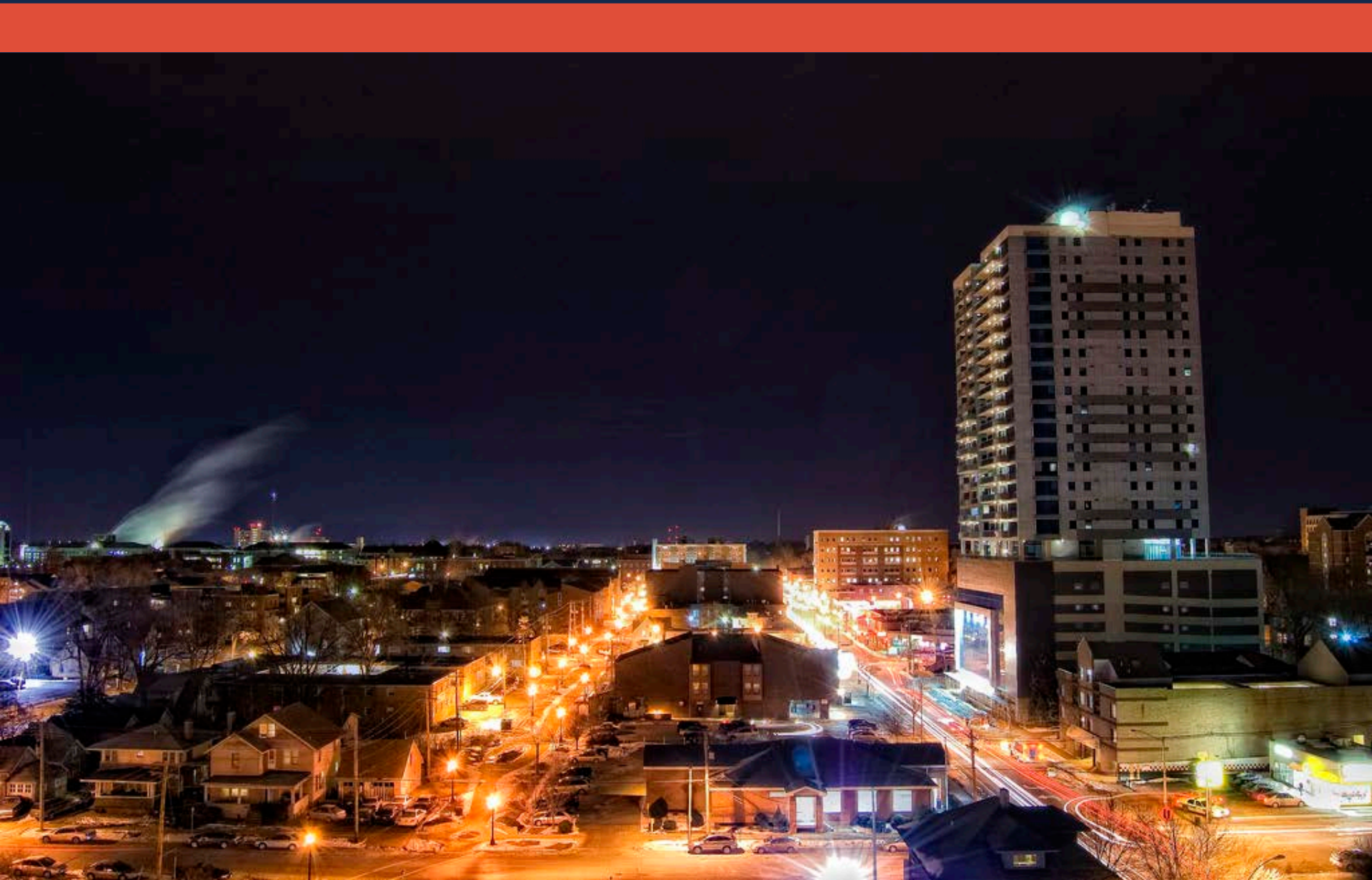
**263** ON-AIRPORT JOBS

**\$35.2M** ON-AIRPORT ECONOMIC OUTPUT

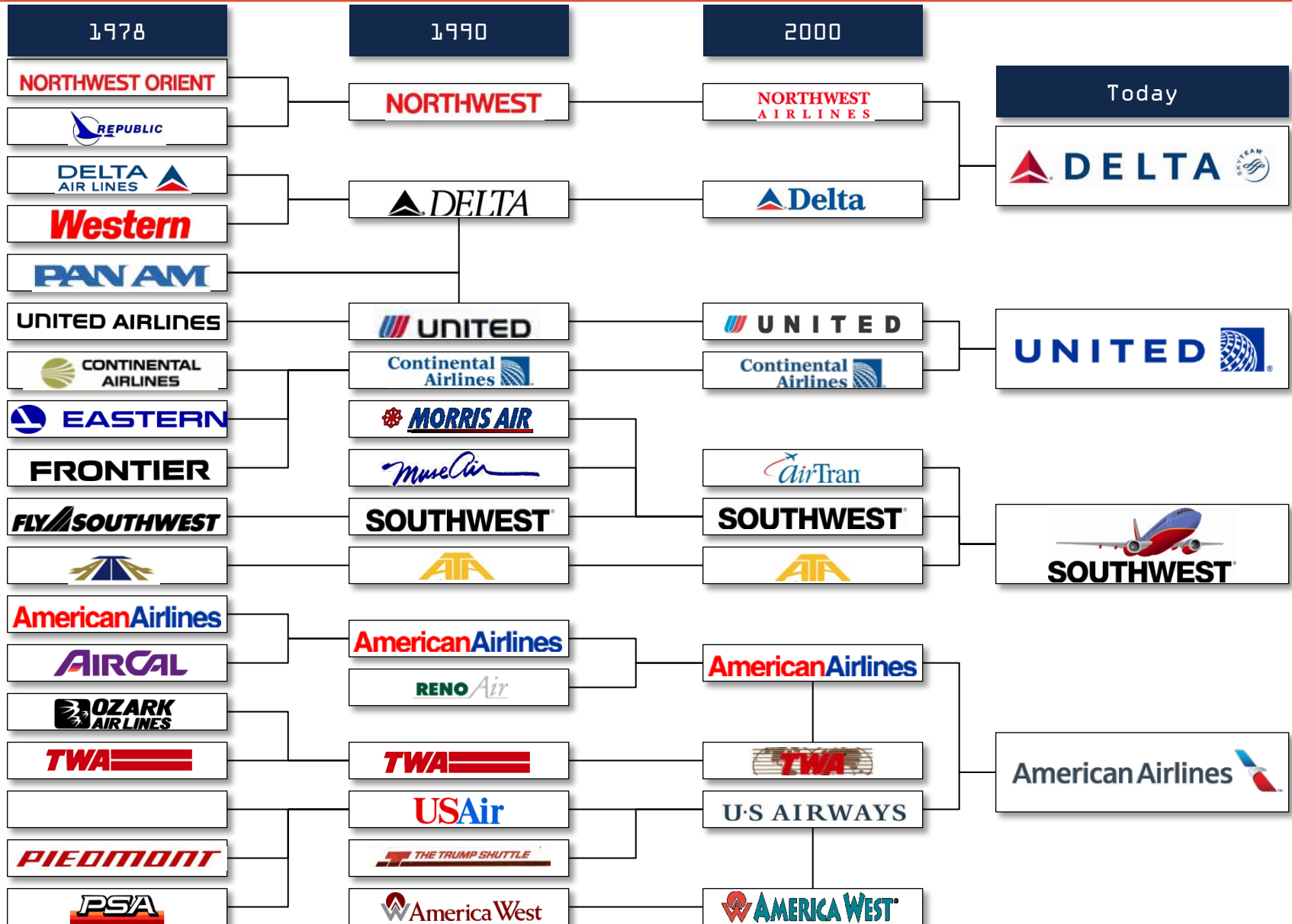
**\$32.5M** ANNUAL PAYROLL

**949** TOTAL JOBS CREATED

**\$102.8M** TOTAL ECONOMIC IMPACT



# MERGERS HAVE WHITTLED-DOWN THE POTENTIAL AIRLINE TARGETS FOR REGIONAL AIRPORTS, WITH THE "FINAL FOUR" REMAINING



# THERE IS SIGNIFICANT COMPETITION FOR AIRCRAFT AMONG CENTRAL ILLINOIS AIRPORT - THE BEST OFFER WILL LIKELY WIN SERVICE



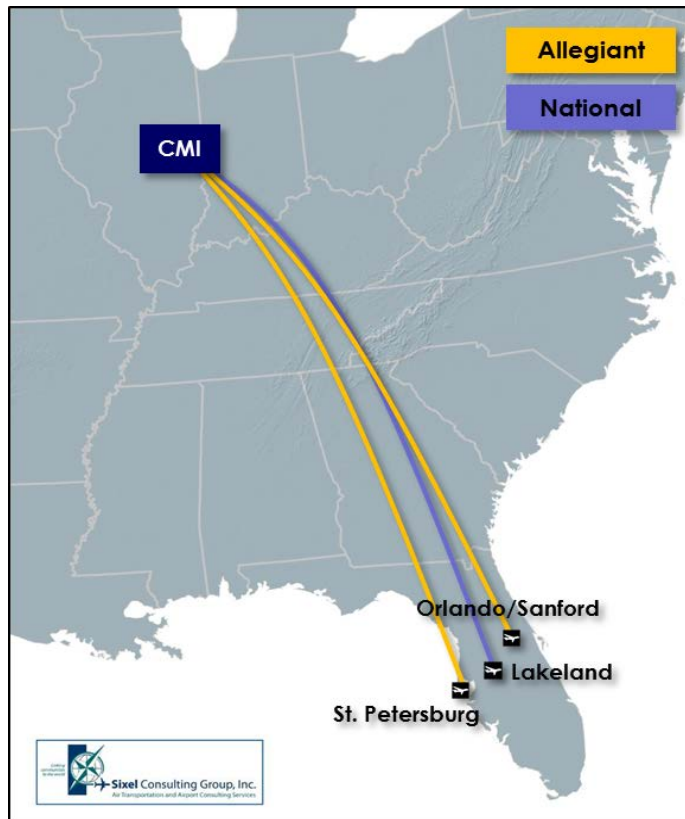


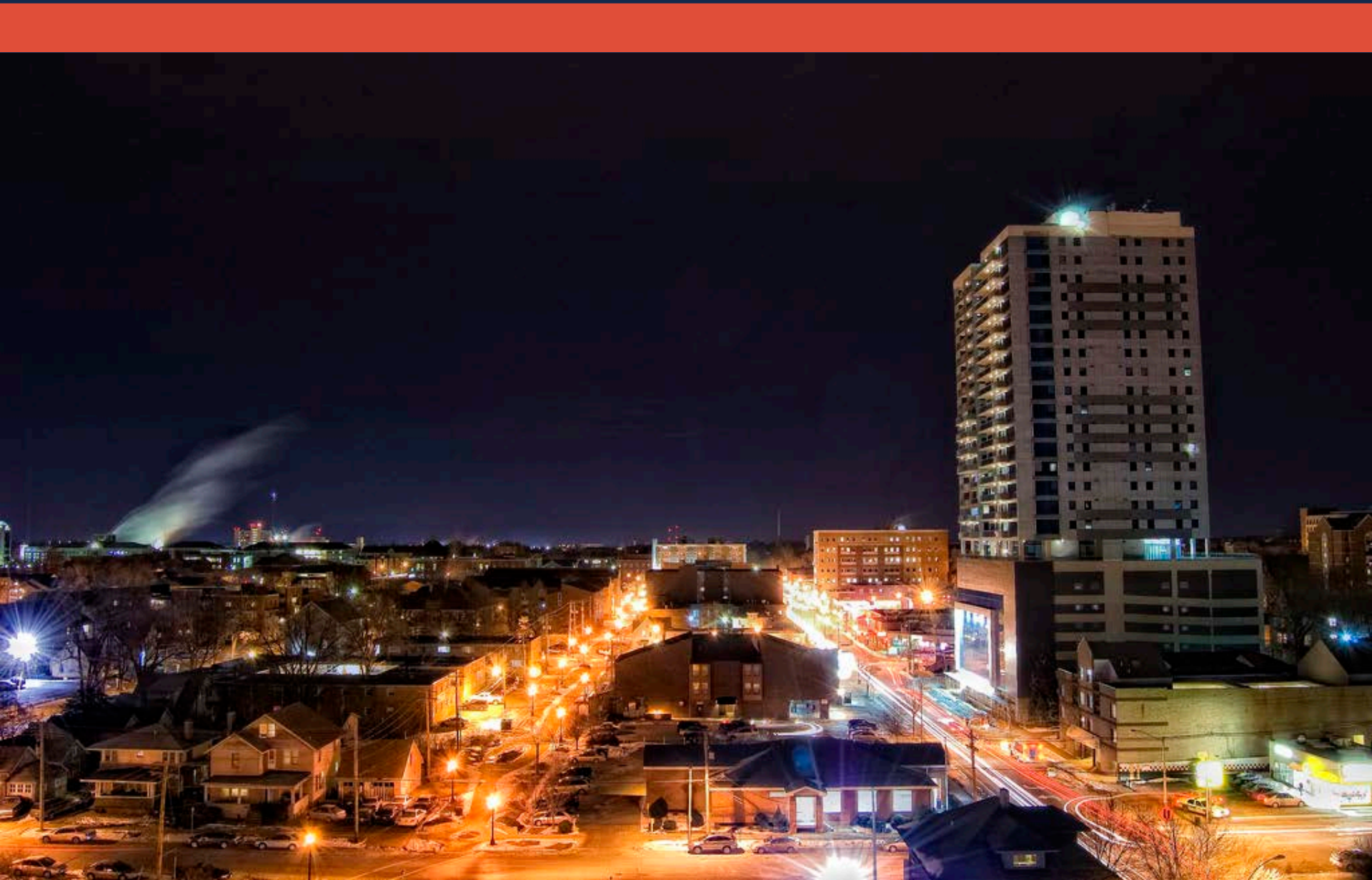
# OUR TARGETS WILL REQUIRE A COMMUNITY-BASED RISK MITIGATION PLAN - THE UI CAN'T GO IT ALONE IN AIR SERVICE RECRUITMENT

## Network Service



## Low Cost Service





# THE UNIVERSITY WILL WORK TOWARD A NEW AIRPORT MANAGEMENT STRUCTURE, WITH AN RFP FOR A PRIVATE FIRM

- ✓ Develop and release An RFP for management firm
- ✓ Develop a job description for an airport CEO
- ✓ New authority for an airport executive director
- ✓ director as an integral part of the community



# THE UNIVERSITY WILL ESTABLISH AN AIRPORT ADVISORY BOARD TO ENSURE THE REGION HAS A SAY IN AIRPORT AFFAIRS

- ✓ 12-member committee of community leaders
  - ✓ Willard Airport Leadership/Management
  - ✓ Tenant Representative
  - ✓ Airline Representative
  - ✓ Pilot Representative
  - ✓ University of Illinois Representative
  - ✓ City of Champaign Representative
  - ✓ City of Urbana Representative
  - ✓ City of Savoy Representative
  - ✓ Champaign County Representative
  - ✓ Champaign Co. Economic Development Corp. Rep.
  - ✓ Champaign County Chamber of Commerce
  - ✓ Large Business Representative
  - ✓ Small Business Representative
  - ✓ Visit Champaign County Representative



# SEVERAL CHANGES TO GROUND TRANSPORTATION WILL LEAD TO MORE STABLE AIRPORT FUNDING AND BETTER SERVICE

- ✓ Automate parking
- ✓ Work with CITIES for new taxi licensing requirements
  - ✓ More stringent appearance standards;
  - ✓ driver training in customer service;
  - ✓ acceptance of credit cards.
- ✓ permanent rental car service facility
  - ✓ Cost \$600,000 to \$1 MILLION
  - ✓ Paid through rental car fees

# A NUMBER OF ADDITIONAL ACTION ITEMS MUST BE ACCOMPLISHED TO ENSURE THE LONG TERM FUTURE OF THE AIRPORT

- ✓ Work with Savoy, the County and other jurisdictions to adopt land use controls to protect the airport
- ✓ Prioritize land acquisition based on runway protection and development
- ✓ Improve wayfinding and beautification;
- ✓ acquire strategic parcels for development
- ✓ WORK TO SECURE FAA FUNDING FOR \$10 million TOWER
  - ✓ FAA design COMPLETE
  - ✓ NO AIRPORT MONEY INVOLVED

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