

FRESNO YOSEMITE INTERNATIONAL AIRPORT

"MARKET LEAKAGE ANALYSIS"

DATA FINDINGS REPORT

NOVEMBER 2015



FRESNO YOSEMITE
INTERNATIONAL AIRPORT



ARCHITECTURE | ENGINEERING | CONSULTING

Market Leakage Analysis – Fresno Yosemite International Airport

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MARKET LEAKAGE ANALYSIS OVERVIEW

Business Focus - *The City of Fresno and the Fresno Yosemite International Airport are proceeding with a study to determine the passenger demand makeup and leakage within the Fresno Yosemite International Airport's Catchment Area.*

Market Leakage Analysis Overview

This Market Leakage Analysis has been developed for air service and strategic marketing and planning efforts. This Analysis will identify factors that may be influencing current passenger trends. The Leakage Analysis reviewed current market demand within a 50 mile radius of the Fresno Yosemite International Airport.

The Leakage Analysis analyzed all reported booked city pairs (*city pair - In airline bookings, the departure and arrival cities on an itinerary*) within the 50 mile radius to determine passenger demand on a total daily passenger level (*Total Daily Passenger Level is the amount of total round trip passengers on a daily basis*). The Study also evaluated the city pairs by from commercial airports within the defined service area. City pairs were also classified by Domestic versus International Destinations.

The competing airports in the Study were the 15 California Airports that reported passenger demand from within the Fresno Yosemite International Airport's Total Catchment Area. The airports include: FAT, LAX, SFO, BFL, SJC, SMF, VIS, SAN, OAK, BUR, ONT, LGB and SBA. The band-width of the data included 68 cities and towns within the 50 mile radius of the Fresno Yosemite International Airport. The time period for the data analysis was January 1, 2014 through December 31, 2014.



Market Leakage Analysis Overview

The Core Business Objectives of the study include the following:

- To support of the airport's mission to understand and identify passenger demand opportunities to encourage air service development growth from its existing carriers and potential new airlines at the Fresno Yosemite International Airport (FAT).
- Define the Fresno Yosemite International Regional Airport Service/Catchment Area.
- Establishing a "Ground Game" Marketing Strategy to increase revenues from increased passenger demand at the Fresno Yosemite International Airport.
- To support the development of a Marketing Action Plan to implement recommendations of the Market Leakage Analysis. A Marketing Action Plan will develop the marketing strategy to be used in the recruitment of new and expanded air service options and increased passenger demand at the Fresno Yosemite International Airport.



Market Leakage Analysis Overview

The Core Business Objectives of the study include the following (continued):

- Determination of the impact of competitive airports market share of the passenger demand within the Fresno Yosemite International Airport Service Area.
- Identify via Passenger Demand researched trends, determine competing airport market shares and identify new passenger demand opportunities for Fresno Yosemite International Airport.
- Identify the top final passenger demand destinations within Fresno Yosemite International Airport Service Areas.
- From the Passenger Demand Analysis, RS&H will identify traffic, by O&D markets, that originates in the airport's service area versus that which is destined for that airport.
- Through the Market Leakage Analysis, the re-defining of the Core, Primary and Secondary Catchment Areas for the Fresno Yosemite International Airport (FAT) which will be completed by zip codes and drive times to FAT and competing airports.



Market Leakage Analysis Overview

Market Assessment Tasks

Task 1: Data Collection - In addition to Fresno Yosemite International Airport activity reports and data available from the to Fresno Yosemite International Airport, the RS&H Research team utilized Market Locator Data from the Airline Reporting Corporation (ARC) to define the Airport's service area and gauge the total passenger activity regardless of Airport of use. ARC is the clearing house for most airline tickets purchased with credit cards in the United States and almost all carriers and travel agencies participate in their program.

Credit cards are the most common form of payment for air travel today, so data based on the billing address of credit cards used to purchase airline tickets could be a better source of information on the distribution of air travel demand. ARC Data provides credit card residence by zip code.

The credit card transaction analysis will detail the local originating demand that would most effectively be served by the to Fresno Yosemite International Airport and also enabled RS&H to accurately quantify the demand and the revenue for travel generated in the primary service area. It also enabled RS&H to identify the traffic in the airport service area that is purchasing tickets for travel from alternate competing airports.



Market Leakage Analysis Overview

Market Assessment Tasks

Task 2: Analysis - This task consisted of the compiling of information and analysis of all data described in Task 1.

The analysis determined the Fresno Yosemite International Airport's Service Area based on the resident zip code of credit card transactions within the Fresno service area including 68 cities and towns within a 50 mile radius of the Airport.

Point of sale for leisure and business passenger demand was also analyzed. Based on research and data, strategies can be developed that illustrate the market opportunities from the Fresno Yosemite International Airport's service area that compliments the Airport's Goals and Objectives of increased revenues through increased passenger demand at the Fresno Yosemite International Airport)Market Service Options).



Market Leakage Analysis Overview

Market Assessment Tasks

Task 3: Recommendations - Based upon the analysis completed in Task 2, the following deliverables were included in this Study:

- Through the Demand Analysis, the re-defining of the Core, Primary and Secondary Catchment Areas for the Fresno Yosemite International Airport (FAT) which will be completed by zip codes and drive times to FAT and competing airports.
- Identify all travel patterns by geographic point of residence of initiated passenger demand by zip code and point of sale combined with other travel demand patterns that will identify potential new passenger demand opportunities for the Fresno Yosemite International Airport.
- Determine the traffic and revenue generated from the Fresno Yosemite International Airport Service Area defined by counties or by zip codes to all competing airports within the service area.
- Recommendations for Next Steps in regards to increased Passenger Demand Marketing Strategies.



EXECUTIVE SUMMARY

Executive Summary

Business Focus - *The City of Fresno and the Fresno Yosemite International Airport are proceeding with a study to determine the passenger demand makeup and leakage within the Fresno Yosemite International Airport's Catchment Area.*

Market Leakage Findings

- The band-width of the data included 68 cities and towns within the 50 mile radius of the Fresno Yosemite International Airport where passenger demand originations were identified. The time period for the data analysis was January 1, 2014 through December 31, 2014.
- The Total Fresno Yosemite International Airport Catchment Area generates an estimated 1,239,480 annual one-way (2,478,960 round-trips). Fifteen (15) California Airports capture 945,753 of these one-way trips or 76 %. The remaining 14% of the demand originates at airports outside the State of California.
- The identified competing California airports in the Study that reported passenger demand from within the Fresno Yosemite International Airport's Total Catchment Area. The airports include: FAT, LAX, SFO, BFL, SJC, SMF, VIS, SAN, OAK, BUR, ONT, LGB and SBA.

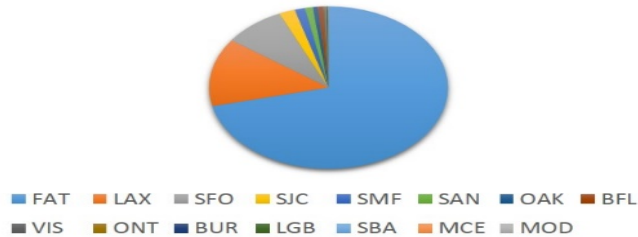


Executive Summary

Market Leakage Findings

- The Fresno Yosemite International Airport is the most preferred Airport of choice within the Total Catchment Area, retaining 71.3% of the demand. LAX ranks a distant 2nd at 13.6%, followed by SFO at 8.3%.

Airport of Origin Market Share



- Overall, the Fresno Yosemite International Airport's increased passenger demand opportunity is in the 28.7% range of the Total Catchment Area leaked demand.
- The top ten cities in the Total Catchment Area generates 86% of the overall total passenger demand (regardless of airport of origin). The top 3 cities of Fresno, Clovis and Visalia generate 65.5% of the total passenger demand.



Executive Summary

Market Leakage Findings

- The top ten cities in the Total Catchment Area generates 86% of the overall total passenger demand (regardless of airport of origin). The top 3 cities of Fresno, Clovis and Visalia generate 65.5% of the total passenger demand.

Catchment Area																			
Rank	Share	Town	FAT	LAX	SFO	SJC	SMF	SAN	OAK	BFL	VIS	ONT	BUR	LGB	SBA	MCE	MOD	Totals	
1	41.1%	FRESNO	73.6%	11.7%	9.2%	2.0%	1.4%	0.9%	0.6%	0.2%	0.1%	0.2%	NA	0.1%	0.1%	0.0%	0.0%	100%	
2	14.3%	CLOVIS	76.2%	9.4%	7.7%	2.5%	1.4%	1.5%	0.7%	0.1%	0.1%	0.3%	0.1%	0.1%	0.1%	NA	0.0%	100%	
3	10.1%	VISALIA	63.7%	22.4%	4.4%	1.9%	1.5%	0.9%	0.5%	2.6%	1.2%	0.3%	0.3%	0.2%	0.1%	NA	NA	100%	
4	4.5%	MADERA	69.2%	9.7%	13.1%	3.2%	2.3%	0.5%	1.6%	0.1%	0.1%	0.0%	0.1%	0.0%	0.0%	NA	NA	100%	
5	4.5%	HANFORD	68.8%	16.4%	7.4%	1.8%	1.2%	1.5%	1.1%	1.0%	0.2%	0.4%	0.0%	0.1%	0.1%	NA	NA	100%	
6	3.4%	LEMOORE	64.4%	16.6%	9.2%	3.2%	1.5%	3.1%	0.7%	0.4%	0.5%	0.1%	NA	0.0%	0.1%	NA	NA	100%	
7	3.0%	TULARE	55.3%	27.0%	3.7%	1.8%	1.1%	1.2%	1.1%	5.1%	1.6%	0.0%	0.7%	1.0%	0.2%	NA	NA	100%	
8	1.9%	REEDELY	70.7%	20.1%	6.5%	0.8%	0.6%	0.3%	0.6%	NA	NA	0.2%	0.2%	0.0%	NA	NA	NA	100%	
9	1.7%	KINGSBURG	67.7%	17.8%	8.5%	2.7%	0.7%	0.7%	0.2%	1.4%	0.0%	0.1%	NA	0.1%	0.0%	NA	NA	100%	
10	1.6%	SANGER	76.4%	13.0%	4.1%	2.1%	1.6%	1.0%	1.6%	NA	NA	0.1%	0.0%	0.0%	NA	NA	NA	100%	
11-68	14.0%	OTHERS	71.0%	13.1%	9.5%	2.3%	1.6%	0.8%	0.7%	0.4%	0.2%	0.2%	0.1%	0.1%	0.0%	0.0%	NA	100%	

- The Fresno Yosemite International Airport is the most preferred Airport of choice within the Total Catchment Area's top ten passenger demand producing communities. 10 out of the 10 communities prefer FAT as their Airport of choice. The Airport is also the preferred Airport among those communities that generate the remaining 14% of the passenger demand in the Total Catchment Area with a 71% utilization rate.



Executive Summary

Market Leakage - Market Demand Findings

- **International Beyond Markets** – The key to successful growth of the air service at the Fresno Yosemite International Airport will be the Airport's ability to identify and aggressively market the untapped beyond international passenger and revenues that are currently leaking to competing airports. In most cases for airports like the Fresno Yosemite International Airport, international beyond passengers may average less than 10% of the airport's total passenger numbers, the related revenues average 35-40% of the revenues. These are the revenues that will attract mainline carriers such as United, American, Delta, Virgin America and Alaska to the Fresno International Airport for expanded service options and new service.
- The Top 50 international markets in the Total Catchment Area generate an estimated 339,000 round trips with an estimated annual total revenues in excess of \$174 million.
- The Market Leakage Analysis identifies which of the top 50 international destinations are key prospects for the Fresno Yosemite International Airport's Passenger Demand Strategy (Reference pages 38,40, and 41 in the Market Leakage Analysis for further illustration).



Executive Summary

Market Leakage - Market Demand Findings

- **Domestic Markets** – Identifying and understanding the domestic passenger demand and related revenues that are being generated within the Total Catchment Area will also play a key role in ensuring successful growth of the air service at the Fresno Yosemite International Airport. Domestic market passenger demand will be important to the Airport's efforts in supporting beyond international passenger and revenues strategy discussions with mainline carriers.
- The Top 50 domestic markets in the Total Catchment Area generate an estimated 1.16 million round trips with an estimated annual total revenues in excess of \$275 million.
- Combining the total domestic and international passenger demand being generated in the Fresno Yosemite International Airport's Total Catchment Area top 50 domestic and international markets equates to an estimated annual round trips in excess of 1.49 million and annual revenues in excess of \$449 million.



Executive Summary

Market Leakage - Market Demand Findings

- **Top 10 International Revenue Producing Markets** – The top beyond international revenue producing markets based on total annual revenues within the Fresno Yosemite International Airport are:
 1. Delhi
 2. Manila
 3. London – Heathrow
 4. Paris - DE Gaul
 5. Los Cabos
 6. Edmonton
 7. Cancun
 8. Guadalajara
 9. Johannesburg
 10. Rome
- The top beyond international revenue producing markets based on average on-way fares within the Fresno Yosemite International Airport are:
 1. Edmonton
 2. Johannesburg
 3. Sydney
 4. Tel Aviv
 5. Auckland



Executive Summary

Market Leakage - Market Demand Findings

- **Top 10 International Revenue Producing Markets** – The top beyond international revenue producing markets based on average on-way fares within the Fresno Yosemite International Airport are:
 1. Edmonton
 2. Johannesburg
 3. Sydney
 4. Tel Aviv
 5. Auckland
 6. Beijing
 7. Hong Kong
 8. Shanghi
 9. Tokyo – Hanedea Airport
 10. Frankfurt
- **Top 10 Domestic Revenue Producing Markets** – The top domestic revenue producing markets based on annual revenues within the Fresno Yosemite International Airport are (in order of largest annual revenues):
 - Phoenix, Denver, Dallas – Ft. Worth, Seattle, Honolulu, Chicago O'Hare, Kahului, Las Vegas, New York – JFK and Orlando.



Executive Summary

Market Leakage - Market Demand Findings

- The Fresno International Airport's Total Catchment Area has an above average propensity for Florida demand markets. Traditional travel trend usually show propensity for leisure destinations west of the Mississippi tend to go to the southwest and west. The following Florida destinations rank in the top 50 markets within the Total Catchment Area:

1. Orlando (MCO)
2. Miami
3. Fort Lauderdale

Market Leakage – Airline Market Share

- American Airlines (30.9%) has the largest market share of passenger demand residing in the Fresno Yosemite International Airport's Total Catchment Area. United (22.2%), Alaska (9.3%), Southwest (6.9%) and Delta (6.6%) follow.



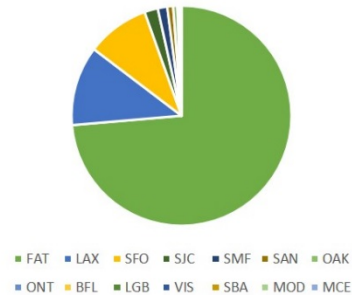
Executive Summary

Market Leakage – Community Profile

- The Fresno Yosemite International Airport's Total Catchment Area Community Profile is very concentrated within the 50 mile radius of FAT. Research identified that ten (10) communities generated 86% of the total passenger demand. The top three (3) Communities; Fresno, Clovis and Visalia generate 65.5% of the demand.

City of Fresno Community Profile

Airport of Origin Market Share



- The remaining 14% of the Total Catchment Area demand is very dispersed among 58 different communities.
- The Community Profiles created as part of the Market Leakage Analysis will serve the Fresno Yosemite International Airport very well in understanding the demographic make-up of its Catchment Area passenger demand. It will also serve the Airport in targeting its marketing and advertising strategies.



Executive Summary

Next Step Recommendations

Research Findings & Data Applications

The results of the Market Leakage Analysis confirms the business objects set forth at the beginning of the Study; to determine the passenger demand makeup and leakage within the Fresno Yosemite International Airport's Catchment Area. The "Next Step" Recommendations are that the Fresno Yosemite International Airport utilize the findings of the Market Leakage to refine its Airport , Air Service and Community Outreach Strategies.

Air Service Marketing – Identify Needs, Opportunities & Establish Priorities

The Fresno International Airport needs to utilize the overall findings to identify and communicate the demographic make-up of the Total Catchment Area along with the pockets of international beyond passenger demand and revenue opportunities and begin to refine its current airline strategies and presentations. The Airport, in conjunction with RS&H begin to outline potential airlines and associated market opportunities to establish air service and passenger demand goals and objectives strongly supported by the findings of the Study.



TOTAL CATCHMENT AREA MARKET LEAKAGE ANALYSIS

Leakage Analysis Sections

1. Total Catchment Area Definition Maps
2. Overall Total Catchment Area Findings
3. Community Profiles

1. Total Catchment Area Definition Maps

Fresno Yosemite International Airport Total Catchment Area

The Fresno Yosemite International Airport Total Catchment Area has been determined as a 50 mile radius of the Fresno Yosemite International Airport.

The band-width of the data included 68 cities and towns within the 50 mile radius that were identified as generators of passenger demand.

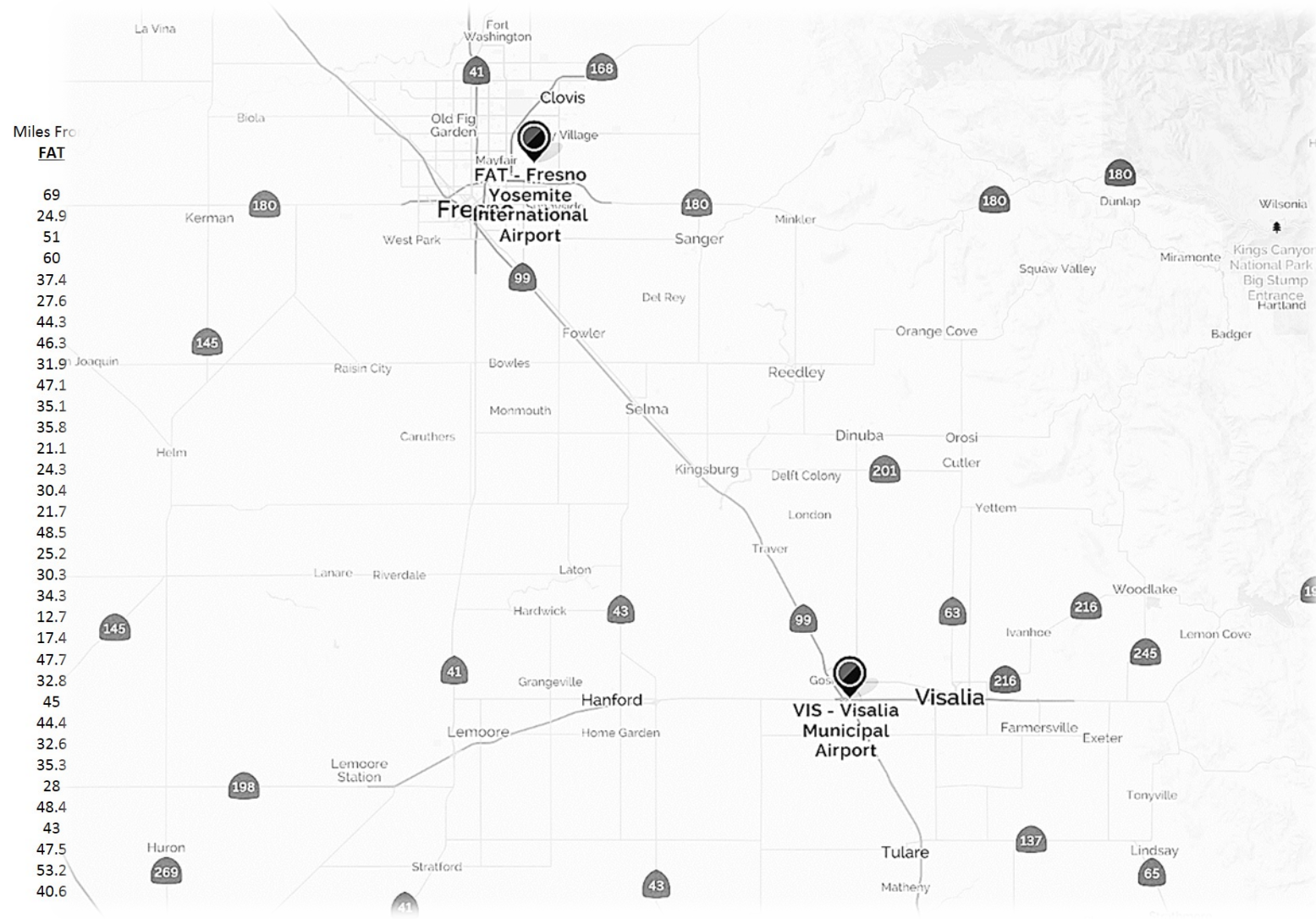
The competing airports in the Study were the 15 California Airports that reported passenger demand from within the Fresno Yosemite International Airport's Catchment Area. The airports include: FAT, LAX, SFO, BFL, SJC, SMF, VIS, SAN, OAK, BUR, ONT, LGB and SBA.



Fresno Yosemite International Airport Total Catchment Area

Catchment Area Drive Times

Town	Miles From FAT	Town	Miles From FAT
AHWANHEE	52.3	LAKESHORE	69
ARMONA	40.8	LATON	24.9
AUBERRY	34	LE GRAND	51
BADGER	52	LEMON COVE	60
BASS LAKE	55	LEMOORE	37.4
BIG CREEK	59	MADERA	27.6
BIOLA	20.6	MIRAMONTE	44.3
CANTUA CREEK	47.6	NORTHFORK	46.3
CARUTHERS	22	O NEALS	31.9
CATHEY'S VALLEY	70.2	OAKHURST	47.1
CHOWCHILLA	44	ORANGE COVE	35.1
CLOVIS	5.5	OROSI	35.8
COARSGOLD	39.3	PARLIER	21.1
CUTLER	37.1	PIEDRA	24.3
DEL REY	14.1	PRATHER	30.4
DINUBA	29.9	RAISIN CITY	21.7
DUNLAP	37.6	RAYMOND	48.5
EXTER	54	REEDLEY	25.2
FAMERSVILLE	50	RIVERDALE	30.3
FIREBAUGH	49.8	SAN JOAQUIN	34.3
FISH CAMP	60	SANGER	12.7
FIVE POINTS	39.6	SELMA	17.4
FOWLER	12	SHAVER LAKE	47.7
FRESNO	6.7	SLUTANA	32.8
FRIANT	16.8	SQUAW VALLEY	45
GOSHEN	36.3	STRATFORD	44.4
HANFORD	33.8	TOLLHOUSE	32.6
HELM	32.5	TRANQUILITY	35.3
HUME	63	TRAVER	28
HURON	57	TULARE	48.4
IVANHOE	49	VISALIA	43
KERMAN	21.5	WISHON	47.5
KINGSBURG	22	WOODLAKE	53.2
KINGS CANYON	43.3	YETTEM	40.6



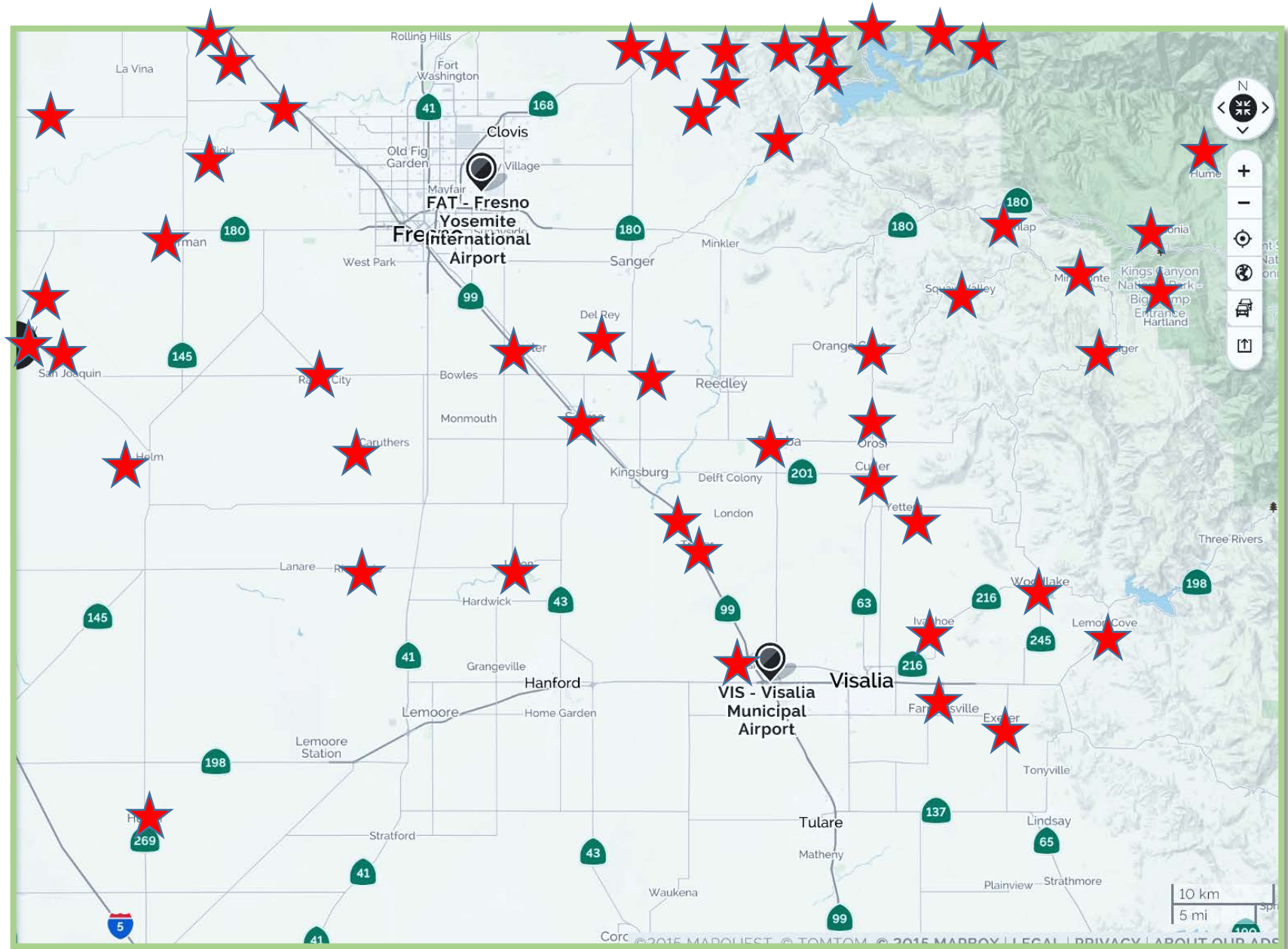
SOURCE:: MapQuest

Fresno	1
Clovis	2
Visalia	3
Madera	4
Hanford	5
Lemoore	6
Tulare	7
Reedley	8
Kingsburg	9
Sanger	10

Fresno Yosemite International Airport Total Catchment Area

**Fresno Yosemite International
Airport Total Catchment Area
14% Demand Share
Communities**

<u>Airport</u>	<u>Market Share</u>	<u>Total 1-Way Passengers</u>
FAT	71.0%	93,431
LAX	13.1%	17,188
SFO	9.5%	12,540
SJC	2.3%	3,039
SMF	1.6%	2,049
SAN	0.8%	1,086
OAK	0.7%	908
BFL	0.4%	591
VIS	0.2%	234
ONT	0.2%	220
LGB	0.1%	165
BUR	0.1%	83
MCE	0.0%	14
SBA	0.0%	0
Totals		131,546



Fresno Yosemite International Airport Total Catchment Area

14% Demand Share Communities

AHWAHNEE	DUNLAP	LAKESHORE	RIVERDALE
ARMONA	EXETER	LATON	SAN JOAQUIN
AUBERRY	FARMERSVILLE	LE GRAND	SELMA
BADGER	FIREBAUGH	LEMON COVE	SHAVER LAKE
BASS LAKE	FISH CAMP	MIRAMONTE	SLUTANA
BIG CREEK	FIVE POINTS	NORTHFORK	SQUAW VALLEY
BIOLA	FOWLER	OAKHURST	STRATFORD
CANTUA CREEK	FRIANT	ONEALS	TOLLHOUSE
CARUTHERS	GOSHEN	ORANGE COVE	TRANQUILITY
CATHEYS VALLEY	HELM	OROSI	TRAVER
CHOWCHILLA	HUME	PARLIER	WISHON
COARSEGOLD	HURON	PIEDRA	WOODLAKE
CUTLER	IVANHOE	PRATHER	YETTEM
DEL REY	KERMAN	RAISIN CITY	
DINUBA	KINGS CANYON	RAYMOND	

This table shows the communities that make up the remaining 14% market share of the Catchment Area passenger demand for calendar year ending Dec 31, 2014.

SOURCE: Bureau of Transportation Statistics T-100 Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014

2. Overall Total Catchment Area Findings

Fresno Yosemite International Airport Total Catchment Area Passenger Demand By City

The top ten cities in the Total Catchment Area generates 86% of the overall total passenger demand (regardless of airport of origin). The top 3 cities of Fresno, Clovis and Visalia generate 65.5% of the total passenger demand.

Rank	Catchment Area Towns	2014		Rank	Catchment Area Towns	2014	
		% Difference Passenger Demand 2013-2014	Catchment Area Share			% Difference Passenger Demand 2013-2014	Catchment Area Share
1	FRESNO	0.7%	41.1%	35	CUTLER	9.4%	0.14%
2	CLOVIS	-0.5%	14.3%	36	SHAVER LAKE	-20.8%	0.14%
3	VISALIA	-5.8%	10.1%	37	ORANGE COVE	-43.3%	0.12%
4	MADERA	3.0%	4.5%	38	FARMERSVILLE	-40.0%	0.10%
5	HANFORD	-2.1%	4.5%	39	IVANHOE	-5.9%	0.09%
6	LEMOORE	-13.7%	3.4%	40	SAN JOAQUIN	19.3%	0.09%
7	TULARE	0.0%	3.0%	41	HUME	45.1%	0.09%
8	REDELY	4.2%	1.9%	42	ONEALS	36.3%	0.09%
9	KINGSBURG	4.5%	1.7%	43	RAYMOND	27.0%	0.08%
10	SANGER	-3.9%	1.6%	44	ARMONA	-61.1%	0.08%
11	DINUBA	5.2%	1.4%	45	CATHEYS VALLEY	-4.4%	0.08%
12	SELMA	12.4%	1.2%	46	LEMON COVE	-21.9%	0.07%
13	EXETER	-21.5%	1.1%	47	DEL REY	12.7%	0.06%
14	COARSEGOLD	-5.5%	1.1%	48	HURON	-76.2%	0.05%
15	OAKHURST	-1.2%	1.0%	49	SLUTANA	10.5%	0.04%
16	CHOWCHILLA	10.5%	0.91%	50	TRANQUILITY	-60.0%	0.03%
17	KERMAN	6.7%	0.89%	51	STRATFORD	-154.2%	0.03%
18	FOWLER	27.7%	0.56%	52	HELM	4.2%	0.03%
19	FIREBAUGH	12.5%	0.35%	53	KINGS CANYON	62.5%	0.03%
20	WOODLAKE	-6.8%	0.35%	54	BIOLA	-19.0%	0.02%
21	SQUAW VALLEY	-4.1%	0.33%	55	TRAVER	0.0%	0.02%
22	RIVERDALE	9.7%	0.32%	56	WISHON	73.7%	0.02%
23	CARUTHERS	2.7%	0.29%	57	CANTUA CREEK	-11.1%	0.02%
24	AUBERRY	-12.5%	0.29%	58	MIRAMONTE	-38.9%	0.02%
25	NORTHFORK	10.5%	0.25%	59	BADGER	-35.3%	0.02%
26	FRIANT	6.6%	0.25%	60	DUNLAP	-70.6%	0.02%
27	LE GRAND	22.6%	0.24%	61	BIG CREEK	-46.7%	0.02%
28	PARLIER	31.7%	0.23%	62	PIEDRA	53.8%	0.01%
29	OROSI	26.7%	0.23%	63	FISH CAMP	-45.5%	0.01%
30	PRATHER	-11.9%	0.20%	64	FIVE POINTS	0.0%	0.01%
31	AHWAHNEE	-17.4%	0.19%	65	GOSHEN	-100.0%	0.01%
32	LATON	11.3%	0.18%	66	LAKE SHORE	83.3%	0.01%
33	TOLLHOUSE	-18.5%	0.17%	67	RAISIN CITY	-25.0%	0.00%
34	BASS LAKE	26.5%	0.17%	68	YETTEM	-700.0%	0.00%

This table ranks the towns in the Total Catchment Area by total demand generated regardless of what airport of origin the travel starts from. It shows 2 percentages. The first being the % gain / loss in passenger demand year over year. The second being the % of the total catchment area demand that was generated in 2014 by town.

*SOURCE: Bureau of Transportation Statistics T-100
Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014*

Fresno Yosemite International Airport Total Catchment Area

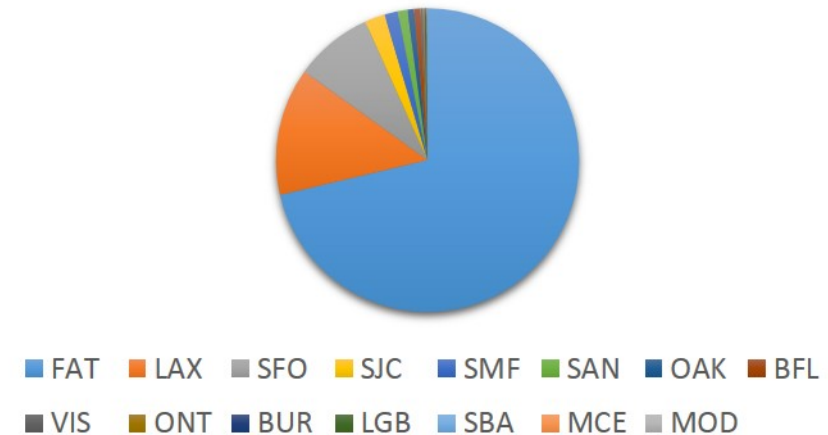
Airport of Origin By California Airports

The 15 California Airports the Airports of origin for 76.3% of the Fresno Yosemite International Airport's Total Catchment Area passenger demand. The remaining 23.7% of the passenger demand origin airports are outside of California.

This table shows the airport of origin in the Total Catchment Area by California Airports for the calendar year ending Dec 31, 2014.

<u>Airport</u>	<u>Market Share</u>	<u>Total 1 - Way Passengers</u>
FAT	71.3%	674,341
LAX	13.6%	128,700
SFO	8.3%	78,939
SJC	2.2%	20,488
SMF	1.4%	13,434
SAN	1.0%	9,804
OAK	0.7%	6,724
BFL	0.6%	6,064
VIS	0.3%	2,448
ONT	0.2%	2,049
BUR	0.1%	1,114
LGB	0.1%	1,114
SBA	0.1%	509
MCE	0.0%	14
MOD	0.0%	14
Report Total		945,753
% of Total Demand		76.3%

Airport of Origin Market Share



FAT is the most preferred Airport of choice within the Total Catchment Area, retaining 71.3% of the demand. LAX ranks a distant 2nd at 13.6%, followed by SFO at 8.3%.

Overall, FAT's increased passenger demand opportunity is in the 28.7% range of the Total Catchment Area leaked demand.

SOURCE: Bureau of Transportation Statistics T-100 Market data & ARC ZIP Code Market Data Finder Data Jan 1, 2014 – December 31, 2014

Fresno Yosemite International Airport Total Catchment Area Airport of Origin By Top 10 Communities

Rank	Cachment Area	Town	FAT	LAX	SFO	SJC	SMF	SAN	OAK	BFL	VIS	ONT	BUR	LGB	SBA	MCE	MOD	Totals
	Share																	
1	41.1%	FRESNO	73.6%	11.7%	9.2%	2.0%	1.4%	0.9%	0.6%	0.2%	0.1%	0.2%	NA	0.1%	0.1%	0.0%	0.0%	100%
2	14.3%	CLOVIS	76.2%	9.4%	7.7%	2.5%	1.4%	1.5%	0.7%	0.1%	0.1%	0.3%	0.1%	0.1%	0.1%	NA	0.0%	100%
3	10.1%	VISALIA	63.7%	22.4%	4.4%	1.9%	1.5%	0.9%	0.5%	2.6%	1.2%	0.3%	0.3%	0.2%	0.1%	NA	NA	100%
4	4.5%	MADERA	69.2%	9.7%	13.1%	3.2%	2.3%	0.5%	1.6%	0.1%	0.1%	0.0%	0.1%	0.0%	0.0%	NA	NA	100%
5	4.5%	HANFORD	68.8%	16.4%	7.4%	1.8%	1.2%	1.5%	1.1%	1.0%	0.2%	0.4%	0.0%	0.1%	0.1%	NA	NA	100%
6	3.4%	LEMOORE	64.4%	16.6%	9.2%	3.2%	1.5%	3.1%	0.7%	0.4%	0.5%	0.1%	NA	0.0%	0.1%	NA	NA	100%
7	3.0%	TULARE	55.3%	27.0%	3.7%	1.8%	1.1%	1.2%	1.1%	5.1%	1.6%	0.0%	0.7%	1.0%	0.2%	NA	NA	100%
8	1.9%	REEDELY	70.7%	20.1%	6.5%	0.8%	0.6%	0.3%	0.6%	NA	NA	0.2%	0.2%	0.0%	NA	NA	NA	100%
9	1.7%	KINGSBURG	67.7%	17.8%	8.5%	2.7%	0.7%	0.7%	0.2%	1.4%	0.0%	0.1%	NA	0.1%	0.0%	NA	NA	100%
10	1.6%	SANGER	76.4%	13.0%	4.1%	2.1%	1.6%	1.0%	1.6%	NA	NA	0.1%	0.0%	0.0%	NA	NA	NA	100%
11-68	14.0%	OTHERS	71.0%	13.1%	9.5%	2.3%	1.6%	0.8%	0.7%	0.4%	0.2%	0.2%	0.1%	0.1%	0.0%	0.0%	NA	100%

This table shows the airport of origin breakout in the Total Catchment Area by the top ten passenger demand generating communities for the calendar year ending Dec 31, 2014.

FAT is the most preferred Airport of choice within the Total Catchment Area's top ten passenger demand producing communities. 10 out of the 10 communities prefer FAT as their Airport of choice.

SOURCE: Bureau of Transportation Statistics T-100 Market data & ARC ZIP Code Market Data Finder Data Jan 1, 2014 – December 31, 2014

Fresno Yosemite International Airport Total Catchment Area

14% Demand Share By Communities

Rank	Catchment Area Towns	% Difference Passenger Demand 2013-2014	2014 Catchment Area Share	Rank	Catchment Area Towns	% Difference Passenger Demand 2013-2014	2014 Catchment Area Share
11	DINUBA	5.2%	1.4%	45	CATHEYS VALLEY	-4.4%	0.08%
12	SELMA	12.4%	1.2%	46	LEMON COVE	-21.9%	0.07%
13	EXETER	-21.5%	1.1%	47	DEL REY	12.7%	0.06%
14	COARSEGOLD	-5.5%	1.1%	48	HURON	-76.2%	0.05%
15	OAKHURST	-1.2%	1.0%	49	SLUTANA	10.5%	0.04%
16	CHOWCHILLA	10.5%	0.91%	50	TRANQUILITY	-60.0%	0.03%
17	KERMAN	6.7%	0.89%	51	STRATFORD	-154.2%	0.03%
18	FOWLER	27.7%	0.56%	52	HELM	4.2%	0.03%
19	FIREBAUGH	12.5%	0.35%	53	KINGS CANYON	62.5%	0.03%
20	WOODLAKE	-6.8%	0.35%	54	BIOLA	-19.0%	0.02%
21	SQUAW VALLEY	-4.1%	0.33%	55	TRAVER	0.0%	0.02%
22	RIVERDALE	9.7%	0.32%	56	WISHON	73.7%	0.02%
23	CARUTHERS	2.7%	0.29%	57	CANTUA CREEK	-11.1%	0.02%
24	AUBERRY	-12.5%	0.29%	58	MIRAMONTE	-38.9%	0.02%
25	NORTHFORK	10.5%	0.25%	59	BADGER	-35.3%	0.02%
26	FRIANT	6.6%	0.25%	60	DUNLAP	-70.6%	0.02%
27	LE GRAND	22.6%	0.24%	61	BIG CREEK	-46.7%	0.02%
28	PARLIER	31.7%	0.23%	62	PIEDRA	53.8%	0.01%
29	OROSI	26.7%	0.23%	63	FISH CAMP	-45.5%	0.01%
30	PRATHER	-11.9%	0.20%	64	FIVE POINTS	0.0%	0.01%
31	AHWAHNEE	-17.4%	0.19%	65	GOSHEN	-100.0%	0.01%
32	LATON	11.3%	0.18%	66	LAKESHORE	83.3%	0.01%
33	TOLLHOUSE	-18.5%	0.17%	67	RAISIN CITY	-25.0%	0.00%
34	BASS LAKE	26.5%	0.17%	68	YETTEM	-700.0%	0.00%
35	CUTLER	9.4%	0.14%				
36	SHAVER LAKE	-20.8%	0.14%				
37	ORANGE COVE	-43.3%	0.12%				
38	FARMERSVILLE	-40.0%	0.10%				
39	IVANHOE	-5.9%	0.09%				
40	SAN JOAQUIN	19.3%	0.09%				
41	HUME	45.1%	0.09%				
42	ONEALS	36.3%	0.09%				
43	RAYMOND	27.0%	0.08%				
44	ARMONA	-61.1%	0.08%				

This table ranks the remaining towns in the Total Catchment Area by total demand generated regardless of what airport of origin the travel starts from. It shows 2 percentages. The first being the % gain / loss in passenger demand year over year. The second being the % of the total catchment area demand that was generated in 2014 by town.

The remaining 14% of the Fresno Catchment Area passenger demand is being generated by 58 different communities.

SOURCE: Bureau of Transportation Statistics T-100
Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014

Fresno Yosemite International Airport Total Catchment Area

Top 50 International Markets

This table ranks the top 50 international markets by round trip passengers, average 1-way fares and total revenues regardless of airport of origin in the Total Catchment Area for the year ending 12/31/2014.

<u>Rank</u>	<u>International Airport</u>	<u>Airport Code</u>	<u>Total Round Trip Passengers</u>	<u>Average 1-Way Fare</u>	<u>Total Revenues</u>	<u>Rank</u>	<u>International Airport</u>	<u>Airport Code</u>	<u>Total Round Trip Passengers</u>	<u>Average 1-Way Fare</u>	<u>Total Revenues</u>
1	Delhi	DEL	34,898	\$729	\$25,440,277.50	26	Calgary	YYC	3,328	\$270	\$898,425.00
2	Guadalajara	GDL	34,568	\$145	\$5,012,287.50	27	Amsterdam	AMS	3,218	\$782	\$2,516,085.00
3	Los Cabos Mexico	SJD	28,408	\$224	\$6,363,280.00	28	Mazatlan	MZT	3,190	\$264	\$842,160.00
4	Manila	MNL	19,800	\$593	\$11,741,400.00	29	Shanghi	PVG	3,190	\$933	\$2,976,270.00
5	London - Heathrow	LHR	15,895	\$547	\$8,694,565.00	30	Dublin	DUB	3,053	\$699	\$2,133,697.50
6	Cancun	CUN	15,648	\$330	\$5,163,675.00	31	Montreal	YUL	3,053	\$426	\$1,300,365.00
7	Vancouver	YVR	15,318	\$219	\$3,354,532.50	32	Panama City	PTY	2,998	\$517	\$1,549,707.50
8	Mexico City	MEX	13,778	\$222	\$3,058,605.00	33	Guam	GUA	2,833	\$340	\$963,050.00
9	Puerto Vallarta	PVR	12,320	\$263	\$3,240,160.00	34	Jamacia	MBJ	2,805	\$326	\$914,430.00
10	Paris - De Gaul	CDG	9,130	\$802	\$7,322,260.00	35	Oaxaca, Mexico	OAX	2,778	\$242	\$672,155.00
11	Toronto	YYZ	8,223	\$319	\$2,622,977.50	36	Amman	AMM	2,750	\$641	\$1,762,750.00
12	Rome	FCO	6,875	\$636	\$4,372,500.00	37	Hong Kong	HKG	2,750	\$927	\$2,549,250.00
13	Del Bajio	BJX	6,600	\$248	\$1,636,800.00	38	Sydney	SYD	2,750	\$1,391	\$3,825,250.00
14	Bangkok	BKK	5,775	\$644	\$3,719,100.00	39	Tel Aviv	TLV	2,750	\$1,388	\$3,817,000.00
15	Barcelona	BCN	5,528	\$710	\$3,924,525.00	40	Istanbul	IST	2,723	\$816	\$2,221,560.00
16	San Jose	SJO	5,335	\$419	\$2,235,365.00	41	Armenia	EVN	2,668	\$866	\$2,310,055.00
17	Narita	NRT	4,813	\$792	\$3,811,500.00	42	Beijing	PEK	2,503	\$971	\$2,429,927.50
18	El Salvador	SAL	4,483	\$323	\$1,447,847.50	43	Punta Cana	PUJ	2,503	\$363	\$908,407.50
19	Lima	LIM	3,905	\$750	\$2,928,750.00	44	Tapei	TPE	2,503	\$771	\$1,929,427.50
20	San Juan	SJU	3,878	\$350	\$1,357,125.00	45	Johannesburg	JNB	2,310	\$2,122	\$4,901,820.00
21	Ho Chi-Menh City	SGN	3,548	\$660	\$2,341,350.00	46	Vientiane, Laos	VTE	2,283	\$605	\$1,380,912.50
22	Venice	VCE	3,493	\$768	\$2,682,240.00	47	Auckland	AKL	2,200	\$1,362	\$2,996,400.00
23	Madrid	MAD	3,465	\$547	\$1,895,355.00	48	Monterrey	MTY	2,118	\$240	\$508,200.00
24	Frankfurt	FRA	3,410	\$888	\$3,028,080.00	49	Edmonton	YEG	2,118	\$2,870	\$6,077,225.00
25	Seoul	ICN	3,355	\$861	\$2,888,655.00	50	Tokyo Haneda Airport	HND	2,090	\$890	\$1,860,100.00
Sub Totals			272,443	\$441.50	\$120,283,213				67,458	\$804.13	\$54,244,630
Report Totals			339,900	\$513.47	\$174,527,843						

The Top 50 international markets in the Total Catchment Area generate an estimated 339,000 round trips with an estimated annual total revenues in excess of \$174 million.

SOURCE: Bureau of Transportation Statistics T-100 Market data & ARC ZIP Code Market Data Finder Data Jan 1, 2014 – December 31, 2014

Fresno Yosemite International Airport Total Catchment Area

Top 50 International Market Share By Airport

This table ranks the top 50 international markets by airport of origin market share in the Total Catchment Area for the year ending 12/31/2014.

Rank	Destination	FAT	LAX	SFO	SJC	SMF	SAN	OAK	BFL	VIS	ONT	LGB	BUR	MCE	SBA	MOD	Totals
1	DEL	12.1%	54.4%	32.9%	0.6%	0.0%	NS	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
2	GDL	88.1%	9.0%	0.9%	1.1%	0.1%	0.0%	0.0%	0.4%	0.1%	0.2%	NA	0.1%	NA	NA	NA	100%
3	SJD	65.5%	22.8%	3.8%	4.5%	0.7%	2.5%	NA	NA	NA	0.2%	NA	0.0%	NA	NA	NA	100%
4	MNL	23.1%	31.3%	43.1%	1.7%	0.0%	1.0%	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
5	LHR	44.8%	31.1%	22.7%	0.7%	0.2%	0.5%	NA	NA	NA	NA	NA	NA	NA	0.0%	NA	100%
6	CUN	54.1%	30.6%	10.2%	1.8%	0.4%	0.5%	1.1%	0.7%	NA	0.4%	0.4%	NA	NA	NA	NA	100%
7	YVR	76.5%	10.6%	9.9%	0.4%	2.0%	NA	0.4%	0.2%	NA	0.2%	NA	NA	NA	NA	NA	100%
8	MEX	68.3%	24.4%	2.4%	1.8%	0.8%	0.4%	1.6%	NA	0.0%	0.4%	NA	NA	NA	NA	NA	100%
9	PVR	65.0%	20.3%	13.4%	0.2%	NA	0.7%	NA	NA	NA	0.4%	NA	NA	NA	NA	NA	100%
10	CDG	50.9%	22.7%	23.9%	0.0%	0.6%	1.8%	0.0%	NA	NA	0.0%	NA	NA	NA	NA	NA	100%
11	YYZ	72.2%	12.4%	9.4%	2.3%	3.0%	0.7%	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
12	FCO	54.0%	28.8%	16.0%	NA	1.2%	0.0%	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
13	BJX	37.9%	51.3%	9.6%	0.8%	0.0%	NA	NA	NA	0.4%	NA	NA	NA	NA	NA	NA	100%
14	BKK	41.9%	30.5%	26.7%	0.5%	NA	0.0%	NA	0.5%	NA	NA	NA	NA	NA	NA	NA	100%
15	BCN	49.8%	30.3%	18.4%	NA	NA	1.5%	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
16	SJO	43.8%	42.3%	12.9%	NA	0.0%	0.5%	NA	0.5%	NA	NA	NA	NA	NA	NA	NA	100%
17	NRT	38.3%	48.0%	9.1%	2.3%	1.7%	0.6%	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
18	SAL	35.0%	52.8%	10.4%	0.0%	1.2%	NA	NA	0.6%	NA	NA	NA	NA	NA	NA	NA	100%
19	LIM	23.9%	57.7%	15.5%	0.0%	2.1%	NA	NA	0.7%	NA	NA	NA	NA	NA	NA	NA	100%
20	SJU	46.8%	14.9%	29.1%	5.7%	1.4%	2.1%	NA	0.0%	NA	NA	NA	NA	NA	NA	NA	100%
21	SGN	47.3%	22.5%	30.2%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
22	VCE	55.1%	26.0%	17.3%	NA	NA	1.6%	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
23	MAD	50.0%	10.3%	35.7%	4.0%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
24	FRA	48.4%	27.4%	23.4%	0.8%	0.0%	NA	0.0%	NA	NA	NA	NA	NA	NA	NA	NA	100%
25	ICN	36.9%	23.8%	36.1%	NA	NA	0.0%	3.3%	NA	NA	NA	NA	NA	NA	NA	NA	100%

Fresno Yosemite International Airport Total Catchment Area

Top 50 International Market Share By Airport

This table ranks the top 50 international markets by airport of origin market share in the Total Catchment Area for the year ending 12/31/2014.

<u>Rank</u>	<u>Destination</u>	<u>FAT</u>	<u>LAX</u>	<u>SFO</u>	<u>SJC</u>	<u>SMF</u>	<u>SAN</u>	<u>OAK</u>	<u>BFL</u>	<u>VIS</u>	<u>ONT</u>	<u>LGB</u>	<u>BUR</u>	<u>MCE</u>	<u>SBA</u>	<u>MOD</u>	<u>Totals</u>
26	YYC	72.7%	14.9%	12.4%	NA	NA	0.0%	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
27	AMS	67.5%	7.7%	20.5%	0.9%	1.7%	NA	0.0%	1.7%	NA	NA	NA	NA	NA	0.0%	NA	100%
28	MZT	55.2%	42.2%	0.9%	0.0%	1.7%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
29	PVG	25.9%	25.0%	49.1%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
30	DUB	45.0%	19.8%	32.4%	0.9%	1.8%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
31	YUL	69.4%	9.9%	17.1%	0.0%	3.6%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
32	PTY	65.1%	23.9%	2.8%	NA	8.3%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
33	GUA	27.2%	72.8%	0.0%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
34	MBJ	44.1%	35.3%	13.7%	0.0%	3.9%	2.9%	NA	0.0%	NA	NA	NA	NA	NA	NA	NA	100%
35	OAX	72.3%	20.8%	5.0%	NA	1.0%	NA	1.0%	NA	NA	NA	NA	NA	NA	NA	NA	100%
36	AMM	18.0%	62.0%	18.0%	NA	NA	NA	NA	NA	NA	NA	NA	2.0%	NA	NA	NA	100%
37	HKG	22.0%	16.0%	62.0%	NA	NA	0.0%	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
38	SYD	37.0%	47.0%	15.0%	NA	NA	NA	NA	1.0%	NA	NA	NA	NA	NA	NA	NA	100%
39	TLV	10.0%	74.0%	15.0%	1.0%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
40	IST	18.2%	67.7%	14.1%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
41	EVN	8.2%	87.6%	4.1%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
42	PEK	23.1%	39.6%	37.4%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
43	PUJ	41.8%	39.6%	16.5%	NA	2.2%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
44	TPE	27.5%	30.8%	41.8%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
45	JNB	23.8%	48.8%	27.4%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
46	VTE	83.1%	7.2%	9.6%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
47	AKL	18.8%	55.0%	23.8%	NA	NA	1.3%	NA	1.3%	NA	NA	NA	NA	NA	NA	NA	100%
48	MTY	89.6%	1.3%	3.9%	NA	3.9%	0.0%	NA	NA	1.3%	NA	NA	NA	NA	NA	NA	100%
49	YEG	77.9%	9.1%	5.2%	2.6%	5.2%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%
50	HND	22.4%	57.9%	19.7%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	100%

Fresno Yosemite International Airport Total Catchment Area

Top 50 Domestic Markets

This table ranks the top 50 domestic markets by round trip passengers, average 1-way fares and total revenues regardless of airport of origin in the Total Catchment Area for the year ending 12/31/2014.

Rank	Domestic Airport	Airport Code	Total Round Trip Passengers	Average 1-Way Fare	Total Revenues	Rank	Domestic Airport	Airport Code	Total Round Trip Passengers	Average 1-Way Fare	Total Revenues
1	Phoenix	PHX	84,728	\$165	\$13,980,038	26	Ft. Lauderdale	FLL	15,373	\$294	\$4,519,515
2	Las Vegas	LAS	79,173	\$124	\$9,817,390	27	Austin	AUS	14,905	\$217	\$3,234,385
3	Denver	DEN	66,743	\$185	\$12,347,363	28	Kansas City	MCI	14,850	\$229	\$3,400,650
4	Seattle	SEA	64,213	\$178	\$11,429,825	29	Washington - Dulles	IAD	14,740	\$341	\$5,026,340
5	Dallas - Ft. Worth	DFW	53,570	\$221	\$11,838,970	30	New York - LGA	LGA	14,603	\$289	\$4,220,123
6	San Diego	SAN	52,910	\$104	\$5,502,640	31	Nashville	BNA	14,520	\$237	\$3,441,240
7	Los Angeles	LAX	45,018	\$164	\$7,382,870	32	Philadelphia	PHL	13,668	\$318	\$4,346,265
8	Chicago O'Hare	ORD	38,940	\$268	\$10,435,920	33	Lihue	LIH	13,558	\$382	\$5,178,965
9	Portland	PDX	35,833	\$163	\$5,840,698	34	St. Louis	STL	13,475	\$253	\$3,409,175
10	Orlando	MCO	34,073	\$272	\$9,267,720	35	Indianapolis	IND	11,688	\$259	\$3,027,063
11	Honolulu	HNL	32,863	\$347	\$11,403,288	36	Baltimore - Wash	BWI	11,495	\$309	\$3,551,955
12	New York -JFK	JFK	30,690	\$310	\$9,513,900	37	Oklahoma City	OKC	11,110	\$221	\$2,455,310
13	Minneapolis	MSP	29,123	\$271	\$7,892,198	38	San Francisco	SFO	9,983	\$151	\$1,507,358
14	Boston	BOS	27,968	\$303	\$8,474,153	39	Boise	BOI	9,873	\$211	\$2,083,098
15	Kahaluli	OGG	26,235	\$382	\$10,021,770	40	Detroit	DTW	9,873	\$313	\$3,090,093
16	Salt Lake	SLC	22,578	\$249	\$5,621,798	41	Kona	KOA	9,790	\$541	\$5,296,390
17	Fresno	FAT	21,313	\$166	\$3,537,875	42	Albuquerque	ABQ	9,185	\$228	\$2,094,180
18	Miami	MIA	19,030	\$270	\$5,138,100	43	Omaha	OMA	9,130	\$244	\$2,227,720
19	Atlanta	ATL	18,398	\$343	\$6,310,343	44	Tampa	TPA	9,130	\$290	\$2,647,700
20	Houston Bush	IAH	18,260	\$287	\$5,240,620	45	Milwaukee	MKE	8,718	\$259	\$2,257,833
21	San Antonio	SAT	18,205	\$248	\$4,514,840	46	Tucson	TUS	8,553	\$191	\$1,633,528
22	New York- Newark	EWB	17,793	\$376	\$6,689,980	47	Spokane	GEG	8,223	\$215	\$1,767,838
23	New Orleans	MSY	17,738	\$299	\$5,303,513	48	Anchorage	ANC	7,508	\$409	\$3,070,568
24	Washington - National	DCA	17,078	\$320	\$5,464,800	49	Pittsburgh	PIT	7,013	\$316	\$2,215,950
25	Charlotte	CLT	15,868	\$271	\$4,300,093	50	Raleigh-Durham	RDU	6,820	\$337	\$2,298,340
Sub Totals			888,333	\$222.07	\$197,270,700				277,778	\$280.81	\$78,001,578
Report Totals			1,166,110	\$236.06	\$275,272,278						

The Top 50 domestic markets in the Total Catchment Area generate an estimated 1.16 million round trips with an estimated annual total revenues in excess of \$275 million.

SOURCE: Bureau of Transportation Statistics T-100 Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014

Fresno Yosemite International Airport Total Catchment Area

Top 50 Domestic Market Share By Airport

This table ranks the top 50 domestic markets by airport of origin market share in the Total Catchment Area for the year ending 12/31/2014.

Rank	Destination	FAT	LAX	SFO	SJC	SMF	SAN	OAK	BFL	VIS	ONT	LGB	BUR	MCE	SBA	MOD	Totals
1	PHX	92.3%	1.2%	0.7%	0.4%	0.6%	0.3%	0.1%	3.6%	NA	0.2%	0.1%	0.4%	NA	0.1%	NA	100%
2	LAS	95.1%	1.4%	2.4%	0.1%	0.4%	0.0%	0.0%	0.0%	0.0%	NA	0.4%	NA	NA	0.0%	NA	100%
3	DEN	89.2%	3.0%	2.3%	0.3%	0.5%	1.0%	0.0%	2.6%	0.5%	0.2%	0.0%	0.2%	NA	0.1%	NA	100%
4	SEA	81.2%	2.1%	4.5%	6.8%	2.0%	0.6%	1.7%	0.0%	0.0%	0.7%	0.0%	0.3%	NA	NA	NA	100%
5	DFW	89.5%	6.2%	1.8%	0.5%	0.8%	0.2%	0.1%	0.6%	NA	0.3%	NA	NA	NA	0.2%	NA	100%
6	SAN	97.7%	0.1%	1.7%	0.1%	0.4%	NA	0.1%	NA	NA	NA	NA	NA	NA	0.0%	NA	100%
7	LAX	84.8%	NA	6.1%	2.3%	2.5%	0.2%	1.3%	0.0%	2.6%	0.0%	NA	0.0%	NA	0.2%	NA	100%
8	ORD	76.3%	7.3%	7.3%	5.3%	1.6%	0.7%	0.0%	0.6%	0.0%	0.4%	0.1%	NA	0.0%	NA	0.0%	100%
9	PDX	80.8%	1.5%	5.8%	4.5%	5.4%	0.2%	1.2%	0.2%	0.0%	0.1%	0.2%	0.2%	NA	NA	NA	100%
10	MCO	78.1%	8.6%	8.0%	0.3%	1.7%	2.0%	NA	NA	0.9%	0.1%	0.2%	NA	0.0%	0.1%	NA	100%
11	HNL	37.2%	16.3%	9.1%	21.7%	3.3%	1.7%	10.9%	NA	NA	NA	NA	NA	NA	NA	NA	100%
12	JFK	64.2%	13.4%	14.6%	2.4%	2.9%	0.4%	0.7%	NA	0.6%	0.1%	0.6%	0.1%	NA	NA	NA	100%
13	MSP	81.5%	7.5%	4.8%	1.7%	2.1%	1.0%	0.0%	0.9%	0.2%	NA	0.1%	NA	NA	0.2%	NA	100%
14	BOS	65.7%	16.6%	9.6%	3.9%	0.4%	1.1%	1.2%	0.1%	1.2%	NA	0.1%	NA	NA	0.1%	NA	100%
15	OGG	52.2%	9.2%	2.4%	21.4%	5.3%	1.0%	8.4%	NA	NA	NA	NA	NA	NA	NA	NA	100%
16	SLC	79.0%	4.0%	4.1%	3.8%	1.6%	1.0%	2.6%	0.9%	0.0%	0.6%	0.6%	1.2%	NA	0.5%	NA	100%
17	FAT	NA	44.4%	9.7%	1.4%	2.6%	39.9%	0.8%	0.3%	NA	0.8%	0.0%	0.1%	NA	0.1%	NA	100%
18	MIA	53.3%	31.9%	9.5%	0.7%	2.9%	1.2%	NA	0.0%	0.4%	NA	NA	NA	0.0%	0.0%	NA	100%
19	ATL	69.1%	14.1%	8.2%	1.8%	4.3%	1.3%	0.1%	0.4%	0.3%	0.3%	0.0%	NA	NA	NA	NA	100%
20	IAH	77.7%	10.2%	3.2%	0.3%	2.3%	0.8%	0.6%	2.0%	1.7%	1.2%	NA	NA	NA	NA	0.2%	100%
21	SAT	92.1%	3.5%	1.1%	1.5%	0.2%	0.3%	NA	1.1%	0.0%	0.2%	0.0%	NA	NA	0.2%	NA	100%
22	EWB	61.8%	17.6%	16.8%	2.6%	0.5%	NA	0.0%	0.5%	0.0%	0.0%	NA	0.0%	NA	0.2%	NA	100%
23	MSY	81.1%	10.5%	5.9%	0.5%	0.5%	0.5%	0.9%	0.0%	0.2%	NA	NA	NA	NA	NA	NA	100%
24	DCA	75.4%	10.8%	9.0%	1.8%	0.3%	0.5%	1.4%	0.6%	0.2%	NA	0.0%	NA	NA	0.0%	NA	100%
25	CLT	81.6%	5.4%	4.5%	1.0%	5.7%	0.2%	NA	0.2%	1.0%	0.3%	NA	0.0%	NA	NA	NA	100%

In the Top 50 domestic markets in the Total Catchment Area, FAT is the Airport of choice in all markets. There is an opportunity for increased passenger demand for FAT in all markets.

Fresno Yosemite International Airport Total Catchment Area

Top 50 Domestic Market Share By Airport

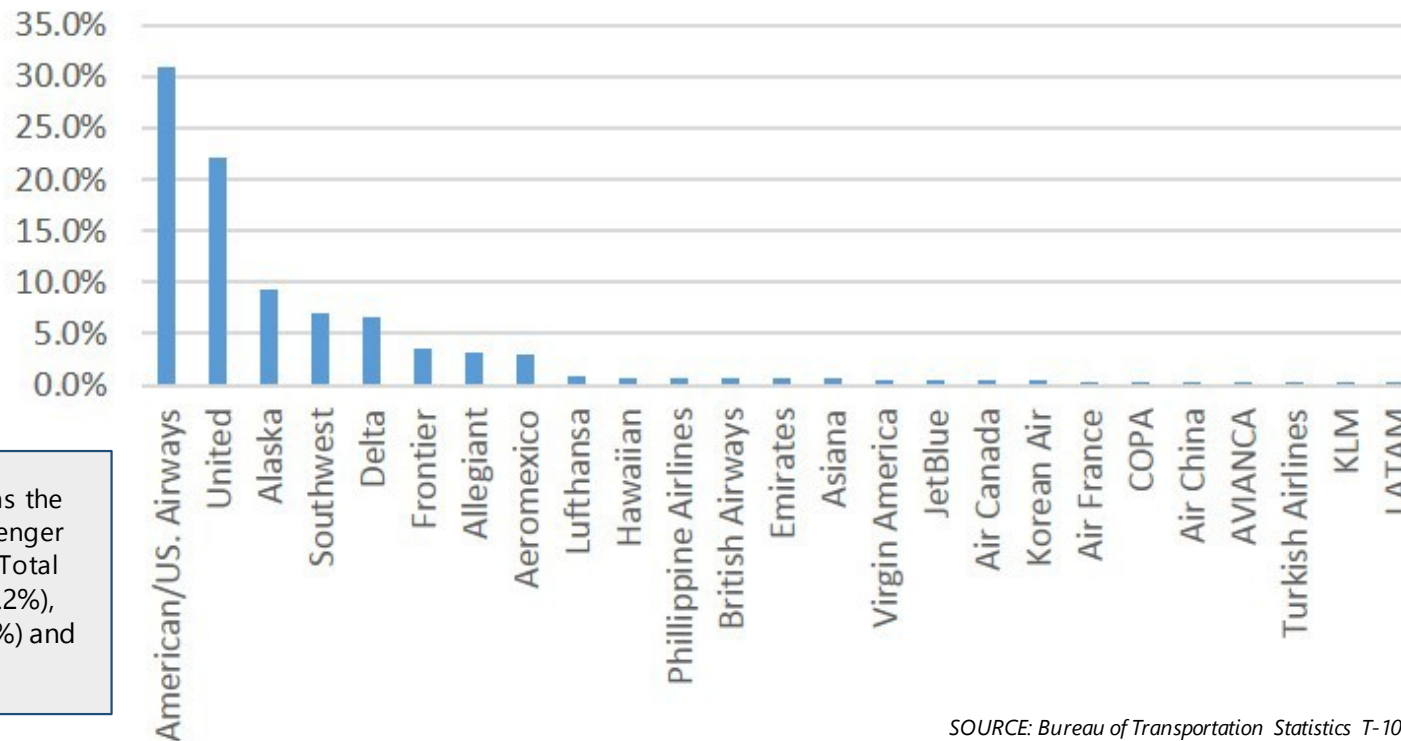
This table ranks the top 50 domestic markets by airport of origin market share in the Total Catchment Area for the year ending 12/31/2014.

Rank	Destination	FAT	LAX	SFO	SJC	SMF	SAN	OAK	BFL	VIS	ONT	LGB	BUR	MCE	SBA	MOD	Totals
26	FLL	61.5%	19.1%	15.6%	1.6%	0.4%	0.7%	NA	0.7%	0.2%	0.2%	NA	NA	NA	NA	NA	100%
27	AUS	84.9%	6.6%	4.8%	2.0%	0.4%	0.6%	0.4%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	NA	NA	100%
28	MCI	90.6%	2.2%	1.3%	0.6%	1.5%	0.4%	1.1%	0.7%	0.9%	0.2%	0.2%	0.4%	NA	0.0%	NA	100%
29	IAD	64.9%	17.4%	11.0%	1.3%	0.6%	1.3%	0.9%	0.0%	1.7%	0.2%	0.7%	0.0%	0.0%	0.0%	NA	100%
30	LGA	80.0%	6.8%	2.6%	5.6%	2.8%	0.4%	NA	1.1%	0.0%	0.2%	NA	0.4%	NA	NA	NA	100%
31	BNA	88.8%	8.5%	1.3%	0.0%	0.8%	0.0%	NA	0.2%	0.2%	0.2%	NA	0.0%	NA	NA	NA	100%
32	PHL	79.1%	9.7%	5.4%	2.8%	1.4%	0.4%	NA	NA	0.4%	0.4%	0.0%	0.4%	NA	NA	NA	100%
33	LIH	62.3%	12.2%	2.0%	15.2%	1.8%	0.8%	5.7%	NA	0.0%	NA	NA	NA	NA	NA	NA	100%
34	STL	87.3%	5.1%	5.1%	1.0%	0.2%	NA	NA	0.2%	0.6%	0.2%	NA	0.2%	NA	0.0%	NA	100%
35	IND	80.0%	8.0%	6.6%	NA	0.2%	0.2%	0.5%	1.2%	1.4%	1.9%	0.0%	NA	NA	0.0%	NA	100%
36	BWI	75.8%	8.6%	11.2%	0.5%	1.0%	0.0%	1.2%	0.2%	0.5%	1.0%	NA	NA	NA	NA	NA	100%
37	OKC	92.8%	1.2%	2.0%	0.5%	1.2%	0.5%	NA	1.5%	0.0%	0.0%	NA	0.2%	NA	NA	NA	100%
38	SFO	64.2%	19.6%	NA	2.5%	0.0%	6.9%	1.7%	1.4%	NA	NA	1.9%	0.0%	NA	NA	0.0%	98%
39	BOI	85.8%	1.7%	1.9%	2.8%	6.7%	0.6%	NA	0.0%	NA	0.6%	0.0%	NA	NA	0.0%	NA	100%
40	DTW	76.0%	12.5%	8.1%	0.3%	1.1%	NA	0.0%	1.4%	0.3%	0.3%	0.0%	NA	NA	NA	NA	100%
41	KOA	37.1%	17.1%	7.0%	25.3%	4.5%	0.8%	8.1%	NA	NA	NA	NA	NA	NA	NA	NA	100%
42	ABQ	90.7%	3.3%	1.5%	0.6%	1.5%	0.3%	0.6%	0.9%	0.0%	0.3%	0.3%	NA	NA	NA	NA	100%
43	OMA	88.3%	5.7%	0.9%	0.3%	1.5%	2.1%	0.0%	0.6%	0.6%	NA	NA	NA	NA	0.0%	NA	100%
44	TPA	82.8%	6.6%	6.6%	0.3%	1.5%	0.6%	NA	0.3%	0.6%	0.6%	NA	NA	NA	NA	NA	100%
45	MKE	78.9%	8.8%	4.4%	0.3%	3.5%	NA	NA	1.6%	0.0%	NA	2.5%	NA	NA	NA	NA	100%
46	TUS	90.7%	4.2%	0.3%	0.3%	0.0%	1.0%	NA	3.2%	NA	NA	0.3%	NA	NA	NA	NA	100%
47	GEG	89.0%	2.7%	3.3%	2.0%	2.7%	0.0%	0.0%	NA	0.3%	NA	NA	NA	NA	NA	NA	100%
48	ANC	78.4%	8.4%	3.7%	0.7%	3.7%	NA	NA	NA	NA	0.0%	5.1%	0.0%	NA	NA	NA	100%
49	PIT	81.2%	8.2%	6.7%	0.4%	0.8%	0.0%	1.6%	0.8%	0.4%	NA	NA	0.0%	NA	NA	NA	100%
50	RDU	74.6%	16.9%	5.2%	1.6%	0.8%	NA	0.0%	0.4%	0.0%	NA	0.0%	0.4%	NA	NA	NA	100%

In the Top 50 domestic markets in the Total Catchment Area, FAT is the Airport of choice in all markets. There is an opportunity for increased passenger demand for FAT in all markets.

Fresno Yosemite International Airport Total Catchment Area

Top 25 Airline Market Share of Total Catchment Area



American Airlines (30.9%) has the largest market share of passenger demand residing in the FAT Total Catchment Area. United (22.2%), Alaska (9.3%), Southwest (6.9%) and Delta (6.6%) follow.

SOURCE: Bureau of Transportation Statistics T-100
Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014

3. Community Profiles

The City of Fresno is 6.7 miles from the Fresno Yosemite International Airport.

The local zip codes include: 93650, 93701, 93702, 93703, 93704, 93705, 93706, 93707, 93708, 93709, 93710, 93711, 93712, 93714, 93715, 93716, 93717, 93718, 93720, 93721, 93722, 93723, 93725, 93726, 93727, 93728, 93729, 93730, 93744, 93745, 93747, 93755, 93771, 93772, 93773, 93774, 93775, 93776, 93777, 93778, 93779, 93790, 93791, 93792, 93793, 93794

This table provides a snapshot of the passenger demand profile that is being generated out of the top communities generating passenger demand in the total Catchment Area for the calendar year ending Dec 31, 2014.

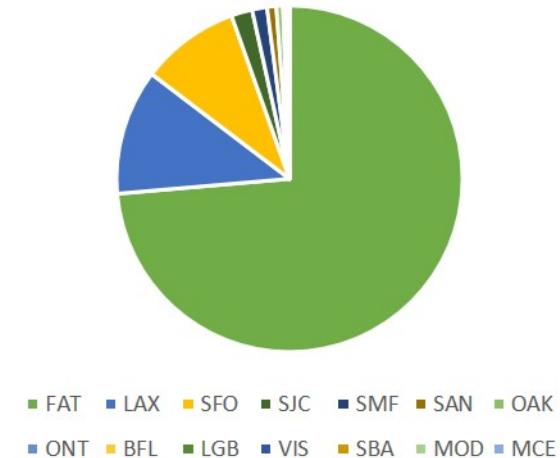


City of Fresno Community Profile

The City of Fresno is the largest generator of passenger demand originating in the FAT Total Catchment Area.

Airport	Airport Market Share	Annual 1-Way Passeng
FAT	73.6%	288,833
LAX	11.7%	45,925
SFO	9.2%	36,176
SJC	2.0%	7,741
SMF	1.4%	5,459
SAN	0.9%	3,383
OAK	0.6%	2,434
ONT	0.2%	825
BFL	0.2%	701
LGB	0.1%	316
VIS	0.1%	275
SBA	0.1%	220
MOD	0.0%	14
MCE	0.0%	0
Total Local Demand		392,301

Airport of Origin Market Share



SOURCE: Bureau of Transportation Statistics T-100
Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014

City of Fresno Community Profile

This table ranks the top 25 international markets by round trip passengers, average 1-way fares and total revenues regardless of airport of origin in the Total Catchment Area for the year ending 12/31/2014 that are being generated by residents of the City of Fresno.

<u>Rank</u>	<u>International Airport</u>	<u>Airport Code</u>	<u>Total Round Trip Passengers</u>	<u>Average 1-Way Fare</u>	<u>Total Revenues</u>
1	Delhi	DEL	21,533	\$729	\$15,697,192.50
2	Guadalajara	GDL	12,678	\$145	\$1,838,237.50
3	Los Cabos Mexico	SJD	10,808	\$224	\$2,420,880.00
4	London - Heathrow	LHR	9,900	\$593	\$5,870,700.00
5	Manila	MNL	7,618	\$547	\$4,167,046.00
6	Vancouver	YVR	7,233	\$219	\$1,584,027.00
7	Mexico City	MEX	6,985	\$222	\$1,550,670.00
8	Cancun	CUN	6,353	\$330	\$2,096,490.00
9	Paris - De Gaul	CDG	5,720	\$802	\$4,587,440.00
10	Bangkok	BKK	4,428	\$644	\$2,851,310.00
11	Toronto	YYZ	4,428	\$319	\$1,412,372.50
12	Puerto Vallarta	PVR	4,208	\$263	\$1,106,572.50
13	Rome	FCO	3,603	\$636	\$2,291,190.00
14	Barcelona	BCN	2,970	\$710	\$2,108,700.00
15	Narita	NRT	2,585	\$792	\$2,047,320.00
16	Armenia	EVN	2,503	\$866	\$2,167,165.00
17	San Juan	SJU	2,503	\$350	\$875,875.00
18	Frankfurt	FRA	2,310	\$888	\$2,051,280.00
19	Vientiane, Laos	VTE	2,283	\$605	\$1,380,912.50
20	Ho Chi-Menh City	SGN	2,200	\$660	\$1,452,000.00
21	Shanghi	PVG	2,173	\$933	\$2,026,942.50
22	Del Bajio	BJX	2,118	\$248	\$525,140.00
23	Dublin	DUB	2,118	\$699	\$1,480,132.50
24	Montreal	YUL	2,118	\$426	\$902,055.00
25	Panama City	PTY	2,063	\$517	\$1,066,312.50
Totals			133,432	\$491.32	\$65,557,963

The City of Fresno Total Catchment Area Top 25 International Markets

*SOURCE: Bureau of Transportation Statistics T-100
Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014*

The Top 25 domestic markets in the Total Catchment Area generated by the City of Fresno is an estimated 133,432 annual round trips with an estimated annual total revenues in excess of \$65.5 million.

City of Fresno Community Profile

This table ranks the top 25 domestic markets by round trip passengers, average 1-way fares and total revenues regardless of airport of origin in the Total Catchment Area for the year ending 12/31/2014 that are being generated by residents of the City of Fresno.

<u>Rank</u>	<u>Domestic Airport</u>	<u>Airport Code</u>	<u>Round Trip Passengers</u>	<u>Average 1-Way Fare</u>	<u>Total Revenues</u>
1	Los Angeles	LAX	39,600	\$164	\$6,494,400
2	Phoenix	PHX	39,215	\$165	\$6,470,475
3	Las Vegas	LAS	37,318	\$124	\$4,627,370
4	Denver	DEN	33,633	\$185	\$6,222,013
5	Seattle	SEA	29,233	\$178	\$5,203,385
6	San Diego	SAN	27,280	\$104	\$2,837,120
7	Dallas Ft. Worth	DFW	25,273	\$221	\$5,585,223
8	Mionneapolis	MSP	17,353	\$271	\$4,702,528
9	New York - JFK	JFK	17,298	\$310	\$5,362,225
10	San Francisco	SFO	17,243	\$151	\$2,603,618
11	Chicago O'Hare	ORD	16,390	\$268	\$4,392,520
12	Portland	PDX	15,208	\$163	\$2,478,823
13	Honolulu	HNL	13,888	\$347	\$4,818,963
14	Orlando	MCO	13,255	\$272	\$3,605,360
15	Boston	BOS	11,990	\$303	\$3,632,970
16	Kahaluli	OGG	11,770	\$382	\$4,496,140
17	Salt Lake	SLC	11,413	\$249	\$2,841,713
18	New York - EWR	EWR	9,598	\$376	\$3,608,660
19	Miami	MIA	8,965	\$270	\$2,420,550
20	Charlotte	CLT	8,800	\$271	\$2,384,800
21	New Orleans	MSY	8,690	\$299	\$2,598,310
22	Atlanta	ATL	8,388	\$343	\$2,876,913
23	New YorlK - LGA	LGA	8,360	\$289	\$2,416,040
24	Washington -National	DCA	7,728	\$320	\$2,472,800
25	Houston - Bush	IAH	7,700	\$287	\$2,209,900
Totals			445,583	\$218.51	\$97,362,815

The City of Fresno Total Catchment Area Top 25 Domestic Markets

*SOURCE: Bureau of Transportation Statistics T-100
Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014*

The Top 25 domestic markets in the Total Catchment Area generated by the City of Fresno is an estimated 445,583 annual round trips with an estimated annual total revenues in excess of \$97 million.

City of Clovis Community Profile

The City of Clovis is the second largest generator of passenger demand originating in the FAT Total Catchment Area.

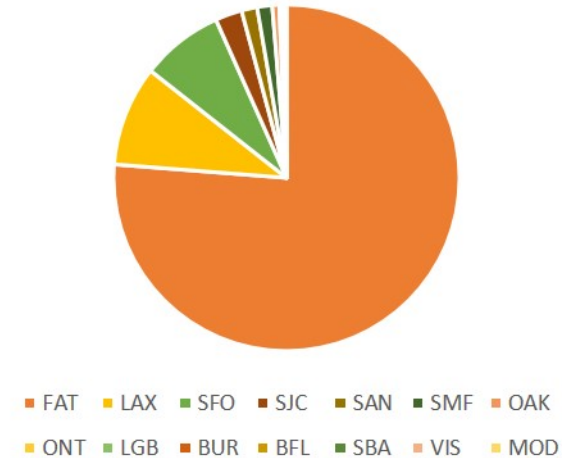
The City of Clovis is 5.5 miles from the Fresno Yosemite International Airport.

The local zip codes include: 93611, 93612, 93613, 93619

This table provides a snapshot of the passenger demand profile that is being generated out of the top communities generating passenger demand in the total Catchment Area for the calendar year ending Dec 31, 2014.

Airport	Market Share	1-Way Passengers
FAT	76.2%	105,160
LAX	9.4%	12,925
SFO	7.7%	10,629
SJC	2.5%	3,451
SAN	1.5%	2,021
SMF	1.4%	1,925
OAK	0.7%	908
ONT	0.3%	413
LGB	0.1%	124
BUR	0.1%	110
BFL	0.1%	96
SBA	0.1%	96
VIS	0.1%	83
MOD	0.0%	0
Total Local Demand		137,940

Airport of Origin Market Share



SOURCE: Bureau of Transportation Statistics T-100
Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014

City of Clovis Community Profile

This table ranks the top 25 international markets by round trip passengers, average 1-way fares and total revenues regardless of airport of origin in the Total Catchment Area for the year ending 12/31/2014 that are being generated by residents of the City of Clovis.

<u>Rank</u>	<u>International Airport</u>	<u>Airport Code</u>	<u>Total Round Trip Passengers</u>	<u>Average 1-Way Fare</u>	<u>Total Revenues</u>
1	Manila	MNL	3,438	\$547	\$1,880,312.50
2	Los Cabos Mexico	SJD	3,218	\$224	\$720,720.00
3	London - Heathrow	LHR	2,833	\$593	\$1,679,672.50
4	Delhi	DEL	2,668	\$729	\$1,944,607.50
5	Puerto Vallarta	PVR	2,365	\$263	\$621,995.00
6	Cancun	CUN	2,255	\$330	\$744,150.00
7	Vancouver	YVR	2,063	\$219	\$451,687.50
8	Paris - De Gaul	CDG	1,815	\$802	\$1,455,630.00
9	Rome	FCO	1,678	\$636	\$1,066,890.00
10	Mexico City	MEX	1,568	\$222	\$347,985.00
11	Toronto	YYZ	1,513	\$319	\$482,487.50
12	Barcelona	BCN	1,073	\$710	\$761,475.00
13	Narita	NRT	1,045	\$792	\$827,640.00
14	San Jose	SJO	770	\$419	\$322,630.00
15	Calgary	YYC	770	\$279	\$214,830.00
16	Guadalajara	GDL	743	\$145	\$107,662.50
17	Lima	LIM	743	\$750	\$556,875.00
18	San Juan	SJU	715	\$350	\$250,250.00
19	Seoul	ICN	688	\$861	\$591,937.50
20	Venice	VCE	688	\$768	\$528,000.00
21	Bangkok	BKK	660	\$644	\$425,040.00
22	Guam	GUA	660	\$340	\$224,400.00
23	Auckland	AKL	633	\$1,362	\$861,465.00
24	Ho Chi-Menh City	SGN	633	\$660	\$417,450.00
25	Guarulhos	GRU	605	\$481	\$291,005.00
Totals			35,833	\$496.11	\$17,776,798

The City of Clovis Total Catchment Area Top 25 International Markets

*SOURCE: Bureau of Transportation Statistics T-100
Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014*

The Top 25 international markets in the Total Catchment Area generated by the City of Clovis is an estimated 35,833 annual round trips with an estimated annual total revenues in excess of 17.5 million.

City of Clovis Community Profile

This table ranks the top 25 domestic markets by round trip passengers, average 1-way fares and total revenues regardless of airport of origin in the Total Catchment Area for the year ending 12/31/2014 that are being generated by residents of the City of Clovis.

<u>Rank</u>	<u>Domestic Airport</u>	<u>Airport Code</u>	<u>Total Round Trip Passengers</u>	<u>Average 1-Way Fare</u>	<u>Total Revenues</u>
1	Phoenix	PHX	16,913	\$165	\$2,790,563
2	Las Vegas	LAS	14,768	\$124	\$1,831,170
3	Los Angeles	LAX	13,530	\$164	\$2,218,920
4	Seattle	SEA	11,220	\$178	\$1,997,160
5	Denver	DEN	10,973	\$185	\$2,029,913
6	San Diego	SAN	10,313	\$104	\$1,072,500
7	Dallas Ft. Worth	DFW	8,498	\$221	\$1,877,948
8	Chicago O'Hare	ORD	7,948	\$268	\$2,129,930
9	Honolulu	HNL	6,710	\$347	\$2,328,370
10	Portland	PDX	6,188	\$163	\$1,008,563
11	San Francisco	SFO	5,445	\$151	\$822,195
12	Portland	MCO	5,418	\$272	\$1,473,560
13	Kahaluli	OGG	5,225	\$382	\$1,995,950
14	Boston	BOS	4,538	\$303	\$1,374,863
15	New York - JFK	JFK	4,510	\$310	\$1,398,100
16	Minneapolis	MSP	4,373	\$271	\$1,184,948
17	Salt Lake	SLC	3,630	\$249	\$903,870
18	Washington - National	DCA	3,053	\$320	\$976,800
19	Washington - Dulles	IAD	2,998	\$341	\$1,022,148
20	Charlotte	ATL	2,943	\$343	\$1,009,278
21	New Orleans	FLL	2,943	\$294	\$865,095
22	Houston - Bush	IAH	2,805	\$287	\$805,035
23	New Orleans	MSY	2,805	\$299	\$838,695
24	Miami	MIA	2,723	\$270	\$735,075
25	Charlotte	CLT	2,668	\$271	\$722,893
Totals			163,130	\$217.09	\$35,413,538

The City of Clovis Total Catchment Area Top 25 Domestic Markets

*SOURCE: Bureau of Transportation Statistics T-100
Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014*

The Top 25 domestic markets in the Total Catchment Area generated by the City of Clovis is an estimated 163,130 annual round trips with an estimated annual total revenues in excess of \$35 million.

City of Visalia Community Profile

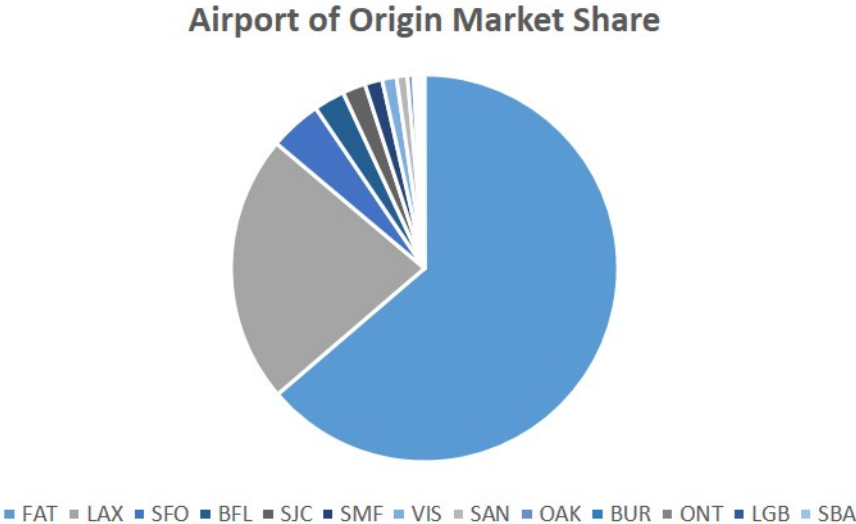
The City of Visalia is the third largest generator of passenger demand originating in the FAT Total Catchment Area.

The City of Visalia is 43 miles from the Fresno Yosemite International Airport.

The local zip codes include: 93277, 93278, 93279, 93290, 93291, 93292

This table provides a snapshot of the passenger demand profile that is being generated out of the top communities generating passenger demand in the total Catchment Area for the calendar year ending Dec 31, 2014.

Airport	Market Share	Total 1-Way Passengers
FAT	63.7%	59,565
LAX	22.4%	20,955
SFO	4.4%	4,070
BFL	2.6%	2,420
SJC	1.9%	1,801
SMF	1.5%	1,361
VIS	1.2%	1,128
SAN	0.9%	853
OAK	0.5%	468
BUR	0.3%	316
ONT	0.3%	316
LGB	0.2%	151
SBA	0.1%	69
Totals		93,473



SOURCE: Bureau of Transportation Statistics T-100
Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014

City of Clovis Community Profile

This table ranks the top 25 international markets by round trip passengers, average 1-way fares and total revenues regardless of airport of origin in the Total Catchment Area for the year ending 12/31/2014 that are being generated by residents of the City of Visalia.

<u>Rank</u>	<u>International Airport</u>	<u>Airport Code</u>	<u>Total Round Trip Passengers</u>	<u>Average 1-Way Fare</u>	<u>Total Revenues</u>
1	Los Cabos Mexico	SJD	3,740	\$224	\$837,760.00
2	Guadalajara	GDL	2,805	\$145	\$406,725.00
3	London - Heathrow	LHR	2,338	\$547	\$1,278,612.50
4	Vancouver	YVR	1,953	\$219	\$427,597.50
5	Manila	MNL	1,623	\$593	\$962,142.50
6	Puerto Vallarta	PVR	1,623	\$263	\$426,717.50
7	Cancun	CUN	1,485	\$330	\$490,050.00
8	Mexico City	MEX	1,430	\$222	\$317,460.00
9	Paris - DeGaul	CDG	1,265	\$802	\$1,014,530.00
10	Delhi	DEL	1,100	\$729	\$801,900.00
11	Rome	FCO	990	\$636	\$629,640.00
12	Hermosillo	HMO	990	\$324	\$320,760.00
13	Lima	LIM	825	\$750	\$618,750.00
14	San Jose	SJO	798	\$419	\$334,152.50
15	El Salvador	SAL	688	\$323	\$222,062.50
16	Toronto	YYZ	660	\$319	\$210,540.00
17	Johannesburg	JNB	633	\$2,122	\$1,342,165.00
18	Bangkok	BKK	605	\$644	\$389,620.00
19	Barcelona	BCN	578	\$710	\$410,025.00
20	Amsterdam	AMS	523	\$782	\$408,595.00
21	Dublin	DUB	495	\$699	\$346,005.00
22	Guam	GUA	495	\$340	\$168,300.00
23	Bombay	BOM	468	\$1,056	\$493,680.00
24	Punta Cana	PUJ	468	\$363	\$169,702.50
25	Calgary	YYC	440	\$270	\$118,800.00
Totals			29,013	\$453.13	\$13,146,293

The City of Visalia Total Catchment Area Top 25 International Markets

*SOURCE: Bureau of Transportation Statistics T-100
Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014*

The Top 25 international markets in the Total Catchment Area generated by the City of Visalia is an estimated 29,013 annual round trips with an estimated annual total revenues in excess of 13 million.

City of Visalia Community Profile

This table ranks the top 25 domestic markets by round trip passengers, average 1-way fares and total revenues regardless of airport of origin in the Total Catchment Area for the year ending 12/31/2014 that are being generated by residents of the City of Visalia.

<u>Rank</u>	<u>Domestic Airport</u>	<u>Airport Code</u>	<u>Total Round Trip Passengers</u>	<u>Average 1-Way Fare</u>	<u>Total Revenues</u>
1	Los Angeles	LAX	10,010	\$164	\$1,641,640
2	Phoenix	PHX	9,955	\$165	\$1,642,575
3	Denver	DEN	8,525	\$185	\$1,577,125
4	Seattle	SEA	8,195	\$178	\$1,458,710
5	Las Vegas	LAS	8,030	\$124	\$995,720
6	Dallas Ft. Worth	DFW	6,435	\$221	\$1,422,135
7	Chicago O'Hare	ORD	4,675	\$268	\$1,252,900
8	Portland	PDX	4,483	\$163	\$730,648
9	Honolulu	HNL	3,823	\$347	\$1,326,408
10	New York - JFK	JFK	3,740	\$310	\$1,159,400
11	San Diego	SAN	3,658	\$104	\$380,380
12	Orlando	MCO	3,438	\$272	\$935,000
13	Salt Lake	SLC	3,080	\$249	\$766,920
14	Kahaluli	OGG	3,053	\$382	\$1,166,055
15	San Francisco	SFO	3,053	\$151	\$460,928
16	Boston	BOS	2,338	\$303	\$708,263
17	Minneapolis	MSP	2,228	\$271	\$603,653
18	Lihue	LIH	2,200	\$382	\$840,400
19	Atlanta	ATL	1,980	\$343	\$679,140
20	Miami	MIA	1,953	\$270	\$527,175
21	New York - EWR	EWR	1,898	\$376	\$713,460
22	St. Louis	STL	1,898	\$253	\$480,068
23	Houston - Bush	IAH	1,870	\$287	\$536,690
24	San Antonio	SAT	1,815	\$248	\$450,120
25	Boise	BOI	1,815	\$211	\$382,965
Totals			104,143	\$219.30	\$22,838,475

The City of Visalia Total Catchment Area Top 25 Domestic Markets

*SOURCE: Bureau of Transportation Statistics T-100
Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014*

The Top 25 domestic markets in the Total Catchment Area generated by the City of Visalia is an estimated 104,143 annual round trips with an estimated annual total revenues in excess of \$22.8 million.

City of Madera Community Profile

The City of Madera is the fourth largest generator of passenger demand originating in the FAT Total Catchment Area.

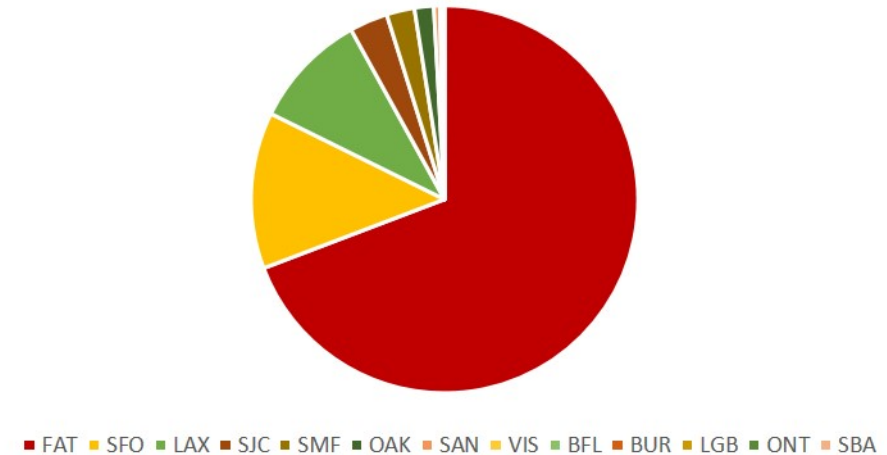
The City of Madera is 27.6 miles from the Fresno Yosemite International Airport.

The local zip codes include: 93636, 93637, 93638, 93639

This table provides a snapshot of the passenger demand profile that is being generated out of the top communities generating passenger demand in the total Catchment Area for the calendar year ending Dec 31, 2014.

Airport	Market Share	Total 1-Way Passengers
FAT	69.2%	30,140
SFO	13.1%	5,693
LAX	9.7%	4,221
SJC	3.2%	1,389
SMF	2.3%	1,018
OAK	1.6%	701
SAN	0.5%	220
VIS	0.1%	55
BFL	0.1%	41
BUR	0.1%	41
LGB	0.0%	14
ONT	0.0%	14
SBA	0.0%	0
Totals		43,546

Airport of Origin Market Share



SOURCE: Bureau of Transportation Statistics T-100
Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014

City of Madera Community Profile

This table ranks the top 25 international markets by round trip passengers, average 1-way fares and total revenues regardless of airport of origin in the Total Catchment Area for the year ending 12/31/2014 that are being generated by residents of the City of Madera.

<u>Rank</u>	<u>International Airport</u>	<u>Airport Code</u>	<u>Total Round Trip Passengers</u>	<u>Average 1-Way Fare</u>	<u>Total Revenues</u>
1	Guadalajara	GDL	3,053	\$145	\$442,612.50
2	Mexico City	MEX	1,733	\$222	\$384,615.00
3	Los Cabos Mexico	SJD	1,348	\$224	\$301,840.00
4	Puerto Vallarta	PVR	1,100	\$263	\$289,300.00
5	Delhi	DEL	1,073	\$729	\$781,852.50
6	Amman	AMM	990	\$641	\$634,590.00
7	Vancouver	YVR	853	\$219	\$186,697.50
8	Cancun	CUN	743	\$330	\$245,025.00
9	Terceira	TER	633	\$756	\$478,170.00
10	Guam	GUA	578	\$340	\$196,350.00
11	London - Heathrow	LHR	523	\$547	\$285,807.50
12	Toronto	YYZ	523	\$319	\$166,677.50
13	Rome	FCO	468	\$636	\$297,330.00
14	Panama City	PTY	385	\$517	\$199,045.00
15	Tijuana	TIJ	385	\$182	\$70,070.00
16	Manila	MNL	358	\$593	\$211,997.50
17	El Salvador	SAL	358	\$323	\$115,472.50
18	Paris - DeGaul	CDG	330	\$802	\$264,660.00
19	Hong Kong	HKG	330	\$927	\$305,910.00
20	Madrid	MAD	303	\$547	\$165,467.50
21	Amsterdam	AMS	275	\$782	\$215,050.00
22	San Jose	SJO	275	\$419	\$115,225.00
23	Fortaleza	FOR	248	\$851	\$210,622.50
24	Lima	LIM	248	\$750	\$185,625.00
25	Beijing	PEK	248	\$971	\$240,322.50
Totals			17,353	\$402.84	\$6,990,335

The City of Madera Total Catchment Area Top 25 International Markets

*SOURCE: Bureau of Transportation Statistics T-100
Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014*

The Top 25 international markets in the Total Catchment Area generated by the City of Madera is an estimated 17,353 annual round trips with an estimated annual total revenues in excess of 6.9 million.

City of Madera Community Profile

This table ranks the top 25 domestic markets by round trip passengers, average 1-way fares and total revenues regardless of airport of origin in the Total Catchment Area for the year ending 12/31/2014 that are being generated by residents of the City of Madera.

<u>Rank</u>	<u>Domestic Airport</u>	<u>Airport Code</u>	<u>Total Round Trip Passengers</u>	<u>Average 1-Way Fare</u>	<u>Total Revenues</u>
1	Phoenix	PHX	4,373	\$165	\$721,463
2	Las Vegas	LAS	3,795	\$124	\$470,580
3	Denver	DEN	3,163	\$185	\$585,063
4	Seattle	SEA	2,640	\$178	\$469,920
5	Los Angeles	LAX	2,475	\$164	\$405,900
6	Dallas Ft. Worth	DFW	2,365	\$221	\$522,665
7	San Diego	SAN	2,255	\$104	\$234,520
8	Orlando	MCO	2,173	\$272	\$590,920
9	San Francisco	SFO	2,118	\$151	\$319,743
10	Houston - Bush	IAH	1,788	\$287	\$513,013
11	Chicago O'Hare	ORD	3,575	\$268	\$958,100
12	Portland	PDX	3,465	\$163	\$564,795
13	New York - JFK	JFK	3,300	\$310	\$1,023,000
14	Honolulu	HNL	3,245	\$347	\$1,126,015
15	Miami	MIA	3,080	\$270	\$831,600
16	Washington - National	DCA	3,025	\$320	\$968,000
17	Ft. Lauderdale	FLL	2,915	\$294	\$857,010
18	Atlanta	ATL	1,210	\$343	\$415,030
19	Boston	BOS	1,210	\$303	\$366,630
20	Kahaluli	OGG	1,183	\$382	\$451,715
21	Oklahoma City	OKC	1,183	\$221	\$261,333
22	Kona	KOA	1,045	\$541	\$565,345
23	New Orleans	MSY	935	\$299	\$279,565
24	Washington - Dulles	IAD	880	\$341	\$300,080
25	San Antonio	SAT	853	\$248	\$211,420
Totals			58,245	\$240.59	\$14,013,423

The City of Madera Total Catchment Area Top 25 Domestic Markets

*SOURCE: Bureau of Transportation Statistics T-100
Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014*

The Top 25 domestic markets in the Total Catchment Area generated by the City of Madera is an estimated 58,245 annual round trips with an estimated annual total revenues in excess of \$14 million.

City of Hanford Community Profile

The City of Hanford is the fifth largest generator of passenger demand originating in the FAT Total Catchment Area.

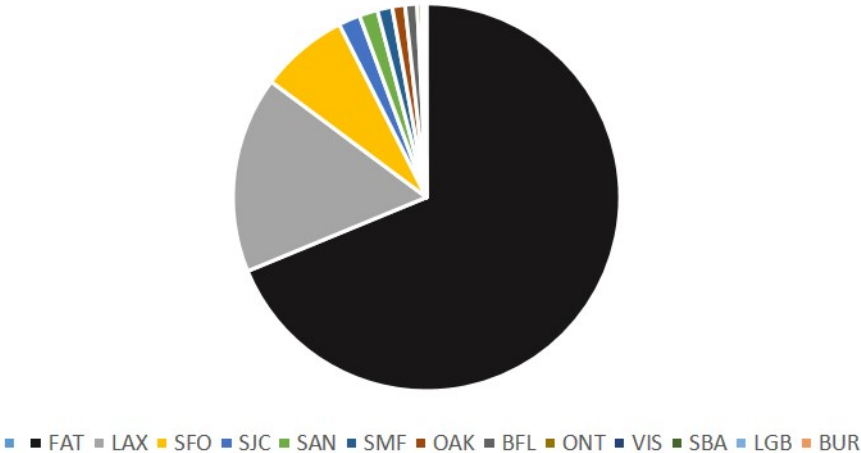
The City of Hanford is 33.8 miles from the Fresno Yosemite International Airport.

The local zip codes include: 93230, 93232

This table provides a snapshot of the passenger demand profile that is being generated out of the top communities generating passenger demand in the total Catchment Area for the calendar year ending Dec 31, 2014.

Airport	Market Share	Total 1-Way Passengers
FAT	68.8%	28,201
LAX	16.4%	6,724
SFO	7.4%	3,025
SJC	1.8%	743
SAN	1.5%	633
SMF	1.2%	509
OAK	1.1%	440
BFL	1.0%	413
ONT	0.4%	151
VIS	0.2%	83
SBA	0.1%	41
LGB	0.1%	28
BUR	0.0%	14
Totals		41,003

Airport of Origin Market Share



SOURCE: Bureau of Transportation Statistics T-100
Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014

City of Hanford Community Profile

This table ranks the top 25 international markets by round trip passengers, average 1-way fares and total revenues regardless of airport of origin in the Total Catchment Area for the year ending 12/31/2014 that are being generated by residents of the City of Hanford.

<u>Rank</u>	<u>International Airport</u>	<u>Airport Code</u>	<u>Total Round Trip Passengers</u>	<u>Average 1-Way Fare</u>	<u>Total Revenues</u>
1	Manila	MNL	2,778	\$593	\$1,647,057.50
2	Cancun	CUN	990	\$330	\$326,700.00
3	Los Cabos Mexico	SJD	963	\$224	\$215,600.00
4	Vancouver	YVR	633	\$219	\$138,517.50
5	Toronto	YYZ	550	\$319	\$175,450.00
6	Rome	FCO	468	\$636	\$297,330.00
7	London - Heathrow	LHR	468	\$547	\$255,722.50
8	Narita	NRT	413	\$792	\$326,700.00
9	Delhi	DEL	385	\$729	\$280,665.00
10	Rio De Janeiro	GIG	358	\$829	\$296,367.50
11	Munich	MUC	358	\$751	\$268,482.50
12	Barcelona	BCN	330	\$710	\$234,300.00
13	Del Bajío	BJX	330	\$248	\$81,840.00
14	Jamacia	MBJ	330	\$326	\$107,580.00
15	Mexico City	MEX	330	\$222	\$73,260.00
16	Puerto Vallarta	PVR	330	\$263	\$86,790.00
17	Paris - De Gaul	CDG	303	\$802	\$242,605.00
18	Sao Paulo	GRU	303	\$758	\$229,295.00
19	San Juan	SJU	275	\$350	\$96,250.00
20	Sydney	SYD	275	\$1,391	\$382,525.00
21	Brussels	BRU	248	\$703	\$173,992.50
22	Tijuana	TIJ	248	\$182	\$45,045.00
23	Bangkok	BKK	220	\$644	\$141,680.00
24	Cebu	CEB	220	\$681	\$149,820.00
25	Lisbon	LIS	220	\$599	\$131,780.00
Totals			12,320	\$519.92	\$6,405,355

The City of Hanford Total Catchment Area Top 25 International Markets

*SOURCE: Bureau of Transportation Statistics T-100
Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014*

The Top 25 international markets in the Total Catchment Area generated by the City of Hanford is an estimated 12,320 annual round trips with an estimated annual total revenues in excess of 6.4 million.

City of Hanford Community Profile

This table ranks the top 25 domestic markets by round trip passengers, average 1-way fares and total revenues regardless of airport of origin in the Total Catchment Area for the year ending 12/31/2014 that are being generated by residents of the City of Hanford.

<u>Rank</u>	<u>Domestic Airport</u>	<u>Airport Code</u>	<u>Total Round Trip Passengers</u>	<u>Average 1-Way Fare</u>	<u>Total Revenues</u>
1	Las Vegas	LAS	4,263	\$124	\$528,550
2	Phoenix	PHX	4,153	\$165	\$685,163
3	Los Angeles	LAX	3,328	\$164	\$545,710
4	Dallas Ft. Worth	DFW	3,080	\$221	\$680,680
5	Seattle	SEA	2,970	\$178	\$528,660
6	Denver	DEN	2,860	\$185	\$529,100
7	San Diego	SAN	2,255	\$104	\$234,520
8	Chicago O'Hare	ORD	2,090	\$268	\$560,120
9	San Francisco	SFO	2,090	\$151	\$315,590
10	Boston	BOS	1,898	\$303	\$574,943
11	Orlando	MCO	1,760	\$272	\$478,720
12	Portland	PDX	1,678	\$163	\$273,433
13	Honolulu	HNL	1,650	\$347	\$572,550
14	Charlotte	CLT	1,403	\$271	\$380,078
15	San Antonio	SAT	1,375	\$248	\$341,000
16	Atlanta	ATL	1,183	\$343	\$405,598
17	St.Louis	STL	1,183	\$253	\$299,173
18	New York - JFK	JFK	1,128	\$310	\$349,525
19	Kahaluli	OGG	1,073	\$382	\$409,695
20	Austin	AUS	1,018	\$217	\$220,798
21	Houston - Bush	IAH	990	\$287	\$284,130
22	Miami	MIA	963	\$270	\$259,875
23	Baltimore -Wash	BWI	935	\$309	\$288,915
24	Oklahoma City	OKC	935	\$221	\$206,635
25	Kona	KOA	825	\$542	\$447,150
Totals			47,080	\$220.91	\$10,400,308

The City of Hanford Total Catchment Area Top 25 Domestic Markets

*SOURCE: Bureau of Transportation Statistics T-100
Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014*

The Top 25 domestic markets in the Total Catchment Area generated by the City of Hanford is an estimated 47,080 annual round trips with an estimated annual total revenues in excess of \$10.4 million.

City of Lemoore Community Profile

The City of Lemoore is the sixth largest generator of passenger demand originating in the FAT Total Catchment Area.

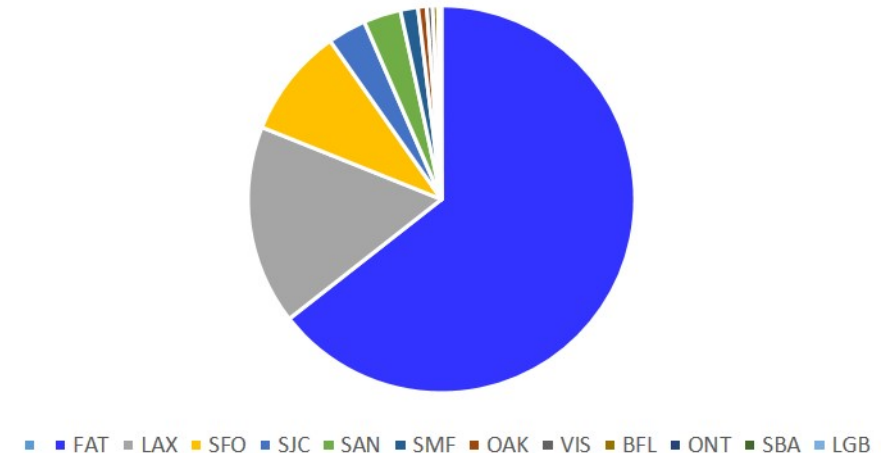
The City of Lemoore is 37.4 miles from the Fresno Yosemite International Airport.

The local zip codes include: 93244, 93245, 93246

This table provides a snapshot of the passenger demand profile that is being generated out of the top communities generating passenger demand in the total Catchment Area for the calendar year ending Dec 31, 2014.

Airport	Market Share	Total 1-Way Passengers
FAT	64.4%	18,150
LAX	16.6%	4,689
SFO	9.2%	2,585
SJC	3.2%	908
SAN	3.1%	880
SMF	1.5%	413
OAK	0.7%	206
VIS	0.5%	138
BFL	0.4%	124
ONT	0.1%	41
SBA	0.1%	28
LGB	0.0%	14
Totals		28,174

Airport of Origin Market Share



SOURCE: Bureau of Transportation Statistics T-100
Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014

City of Lemoore Community Profile

This table ranks the top 25 international markets by round trip passengers, average 1-way fares and total revenues regardless of airport of origin in the Total Catchment Area for the year ending 12/31/2014 that are being generated by residents of the City of Lemoore.

<u>Rank</u>	<u>International Airport</u>	<u>Airport Code</u>	<u>Total Round Trip Passengers</u>	<u>Average 1-Way Fare</u>	<u>Total Revenues</u>
1	Manila	MNL	3,438	\$593	\$2,038,437.50
2	Los Cabos Mexico	SJD	633	\$224	\$141,680.00
3	Cancun	CUN	550	\$330	\$181,500.00
4	Narita	NRT	468	\$792	\$370,260.00
5	Auckland	AKL	330	\$1,362	\$449,460.00
6	Guadalajara	GDL	330	\$145	\$47,850.00
7	San Juan	SJU	248	\$350	\$86,625.00
8	Luzon Island	CRK	220	\$674	\$148,280.00
9	Tokyo Haneda Airport	HND	220	\$890	\$195,800.00
10	Vancouver	YVR	193	\$219	\$42,157.50
11	Paris - DeGaul	CDG	165	\$802	\$132,330.00
12	Cebu	CEB	165	\$681	\$112,365.00
13	Dubai	DXB	165	\$1,137	\$187,605.00
14	Hong Kong	HKG	165	\$927	\$152,955.00
15	Toronto	YYZ	165	\$319	\$52,635.00
16	Guam	GUM	138	\$1,111	\$152,762.50
17	Seoul	ICN	138	\$861	\$118,387.50
18	London - Heathrow	LHR	138	\$547	\$75,212.50
19	Puerto Vallarta	PVR	138	\$263	\$36,162.50
20	El Salvador	SAL	138	\$323	\$44,412.50
21	Bangkok	BKK	110	\$644	\$70,840.00
22	Amsterdam	AMS	110	\$782	\$86,020.00
23	Barcelona	BCN	110	\$710	\$78,100.00
24	Del Bajío	BJX	110	\$248	\$27,280.00
25	Johannesburg	JNB	110	\$2,122	\$233,420.00
Totals			8,690	\$605.59	\$5,262,538

The City of Lemoore Total Catchment Area Top 25 International Markets

*SOURCE: Bureau of Transportation Statistics T-100
Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014*

The Top 25 international markets in the Total Catchment Area generated by the City of Lemoore is an estimated 8,690 annual round trips with an estimated annual total revenues in excess of 5.2 million.

City of Lemoore Community Profile

This table ranks the top 25 domestic markets by round trip passengers, average 1-way fares and total revenues regardless of airport of origin in the Total Catchment Area for the year ending 12/31/2014 that are being generated by residents of the City of Lemoore.

<u>Rank</u>	<u>Domestic Airport</u>	<u>Airport Code</u>	<u>Total Round Trip Passengers</u>	<u>Average 1-Way Fare</u>	<u>Total Revenues</u>
1	Phoenix	PHX	2,943	\$165	\$485,513
2	Denver	DEN	2,833	\$185	\$524,013
3	Las Vegas	LAS	2,640	\$124	\$327,360
4	Los Angeles	LAX	2,613	\$164	\$428,450
5	Seattle	SEA	2,255	\$178	\$401,390
6	San Diego	SAN	2,145	\$104	\$223,080
7	Chicago O'Hare	ORD	1,925	\$268	\$515,900
8	Orlando	MCO	1,760	\$272	\$478,720
9	Dallas Ft. Worth	DFW	1,705	\$221	\$376,805
10	San Francisco	SFO	1,705	\$151	\$257,455
11	Honolulu	HNL	1,678	\$347	\$582,093
12	Portland	PDX	1,348	\$163	\$219,643
13	Kahaluli	OGG	1,265	\$382	\$483,230
14	Boston	BOS	1,238	\$303	\$374,963
15	Norfolk	ORF	1,128	\$320	\$360,800
16	Charlotte	CLT	990	\$271	\$268,290
17	New York - JFK	JFK	963	\$310	\$298,375
	Washington -				
18	Dulles	IAD	935	\$287	\$268,345
19	Atlanta	ATL	908	\$343	\$311,273
20	San Antonio	SAT	880	\$853	\$750,640
21	Pensacola	PNS	880	\$288	\$253,440
22	Detroit	DTW	853	\$313	\$266,833
23	Austin	AUS	825	\$217	\$179,025
24	Baltimore - Wash	BWI	715	\$309	\$220,935
25	Philadelphia	PHL	715	\$318	\$227,370
Totals			37,840	\$240.06	\$9,083,938

The City of Lemoore Total Catchment Area Top 25 Domestic Markets

*SOURCE: Bureau of Transportation Statistics T-100
Market data & ARC ZIP Code Market Data Finder
Data Jan 1, 2014 – December 31, 2014*

The Top 25 domestic markets in the Total Catchment Area generated by the City of Lemoore is an estimated 37,840 annual round trips with an estimated annual total revenues in excess of \$9 million.

CONTACT INFORMATION

Contact Information



Bruce E. Tarletsky
Senior Business Consultant
300 West Adams Street
Suite 400
Chicago, IL 60606
Phone: 630.841.2257
Bruce.Tarletsky@rsandh.com



Susan J. Kittle
Planner
300 West Adams Street
Suite 400
Chicago, IL 60606
Phone: 610.216.5849
Susan.kittle@rsandh.com

