



Reno-Tahoe
International
Airport

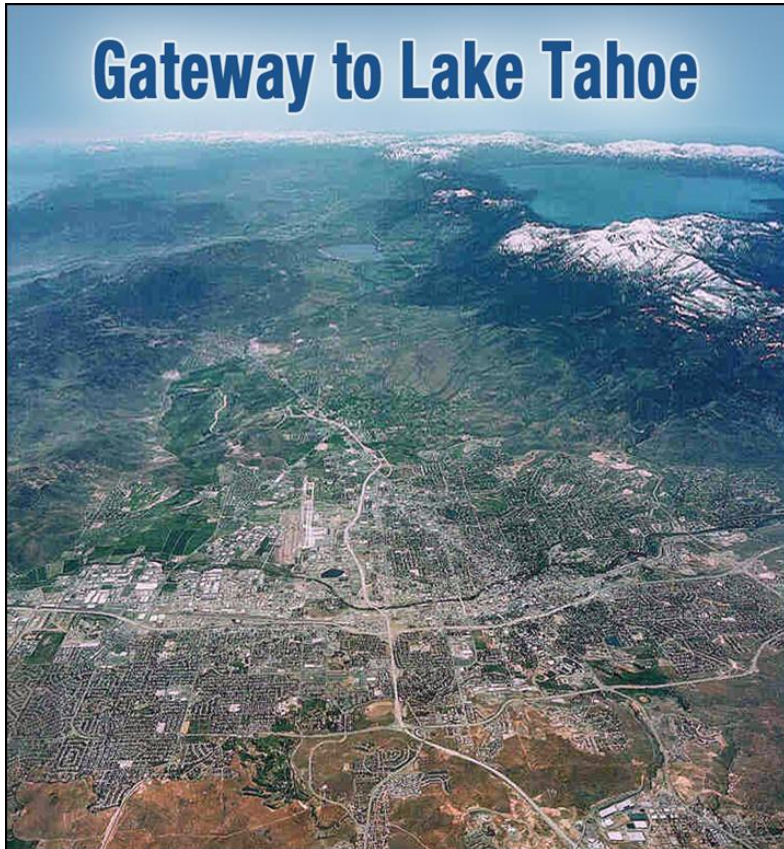
Reno-Tahoe International Airport Update

Truckee Tahoe Airport

August 28, 2019

The RNO Catchment Area

Reno/Sparks MSA, Lake Tahoe and Carson City

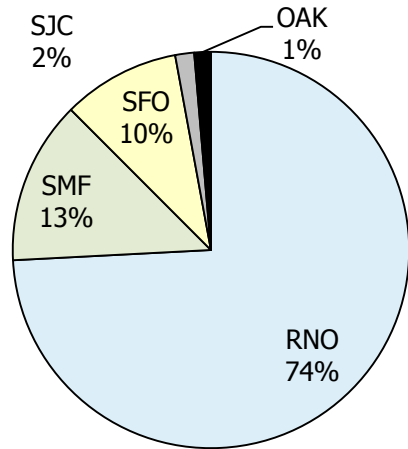


- The RNO primary catchment area has a population of over 752,347
- 1.3M people including secondary catchment area

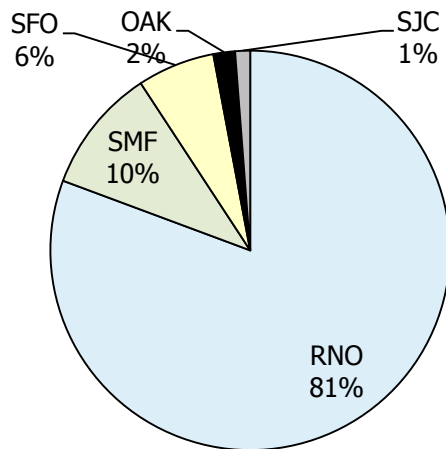
Reno-Sparks MSA	445,930
Northwest Nevada	215,512
<u>Eastern Sierra (California)</u>	<u>90,905</u>
TOTAL	752,347

Mead and Hunt Consulting

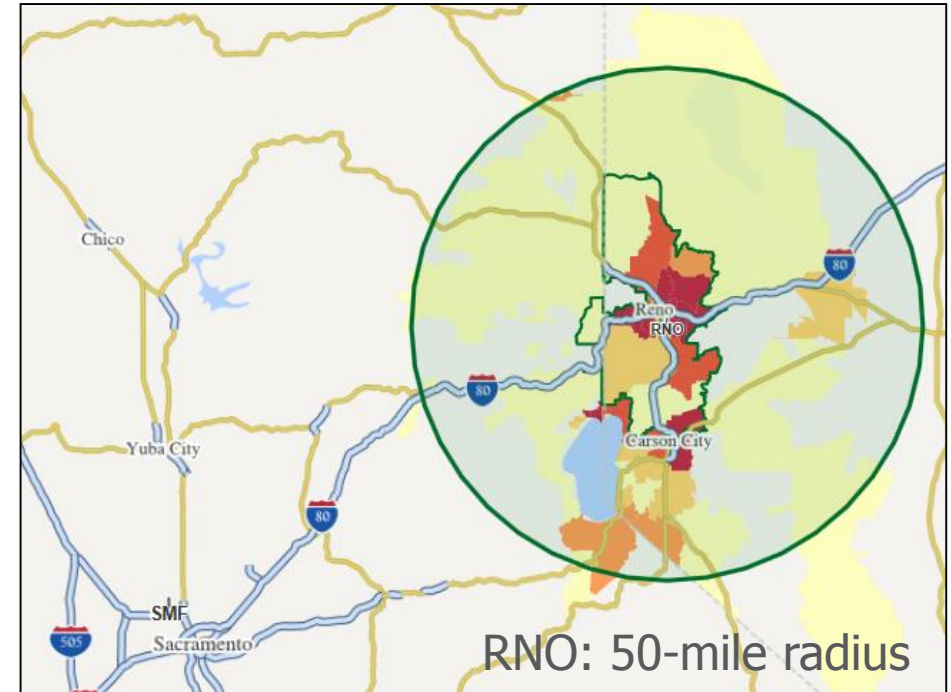
The Reno-Tahoe Catchment Area & Leakage



Destination Analysis
Arriving traffic of passengers who visit within 50-mile radius of RNO



Origination Analysis
Departing traffic of passengers who live within 50-mile radius of RNO



Source: Airline Data Inc., using:

- Internet Search Data, provides higher level of confidence in zip code assignment of the O&D
- Hospitality Data, market size and visitors skew is addressed
- O&D Data, overlay the search and hospitality data on DB1B

Flights to/from Reno-Tahoe International Airport

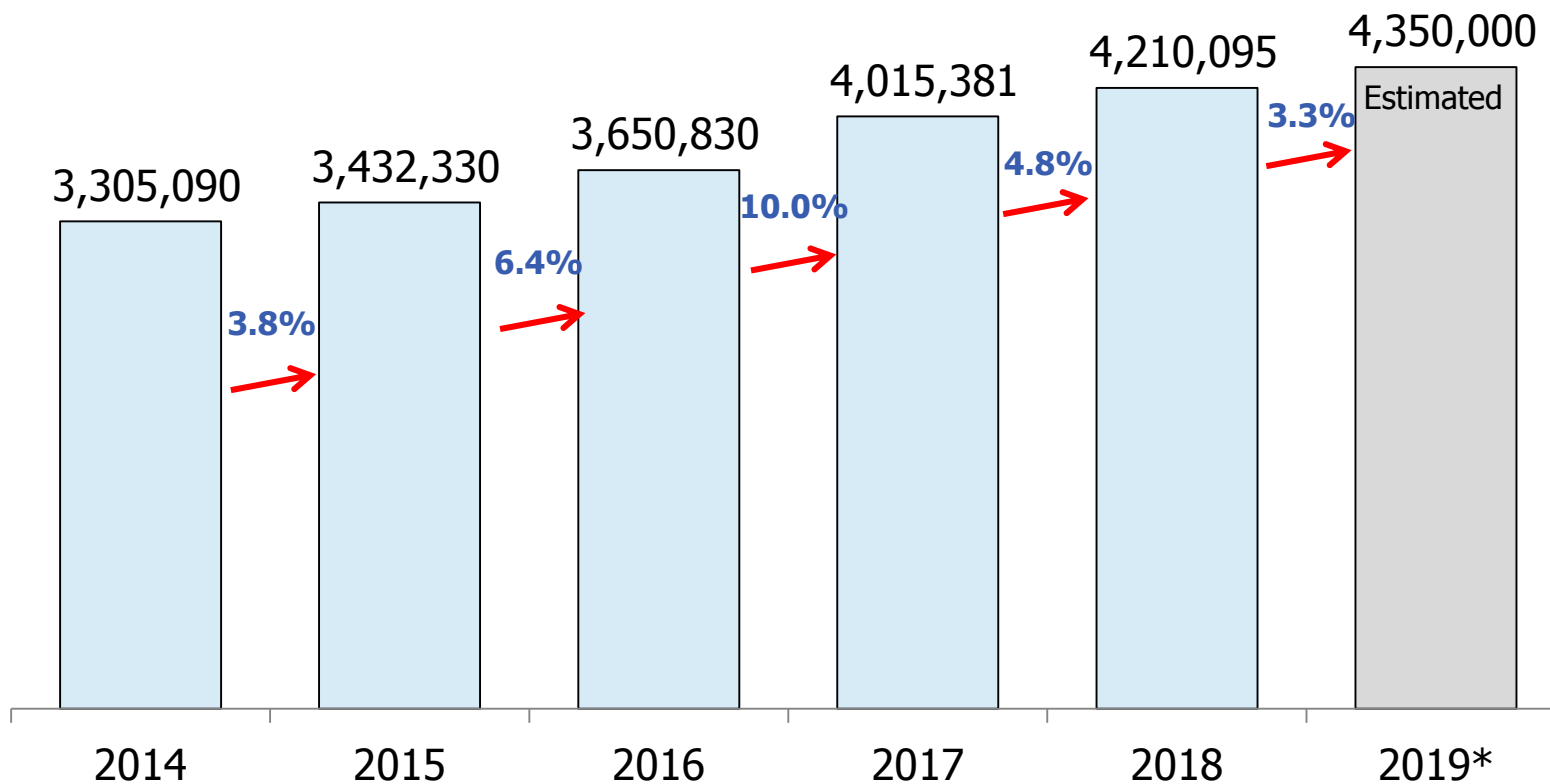


STAR ALLIANCE

- Non-Stop Destinations
 - - -● Seasonal Non-Stop Destinations
 - Virtually anywhere in the US with one-stop.*
- * Blue dots on the United States map represent only a portion of the commercial airports accessible via one-stop air service to/from the Reno-Tahoe International Airport.



RNO Annual Passengers



June 2019 represents 49th consecutive month in terms of year-over-year monthly passenger growth

Note: Calendar Year data is shown in the graph

January-June 2019 is actual data. July-December 2019 data is a 2.7% year over year monthly increase estimate (rounded down)

Source: Reno-Tahoe International Airport Airline Activity Reports, December 2018

Air Service Comparison 2014 vs. 2019

Year 2014		Year 2019
Seven*	Airlines	Nine***
51	Avg. Daily Flights (one-way)	65
5,676	Avg. Daily Seats (one-way)	7,780
16**	Destinations	22***

Note: Annual Average is used for 2014 and 2019

* American Airlines and US Airways is considered one airline due to the merger

** Bellingham is not included. Allegiant operated only six flights in 2014

*** California Pacific Airlines and Carlsbad are not included.

Source: FlightGlobal formerly INNOVATA, Schedules via Diio. March 2019. the year 2019 Schedule is subject to change

2019 Schedule Increase

Alaska Airlines

- Seattle, Portland



Southwest Airlines

- San Diego, San Jose, Las Vegas



United Airlines

- Chicago, Houston, Los Angeles



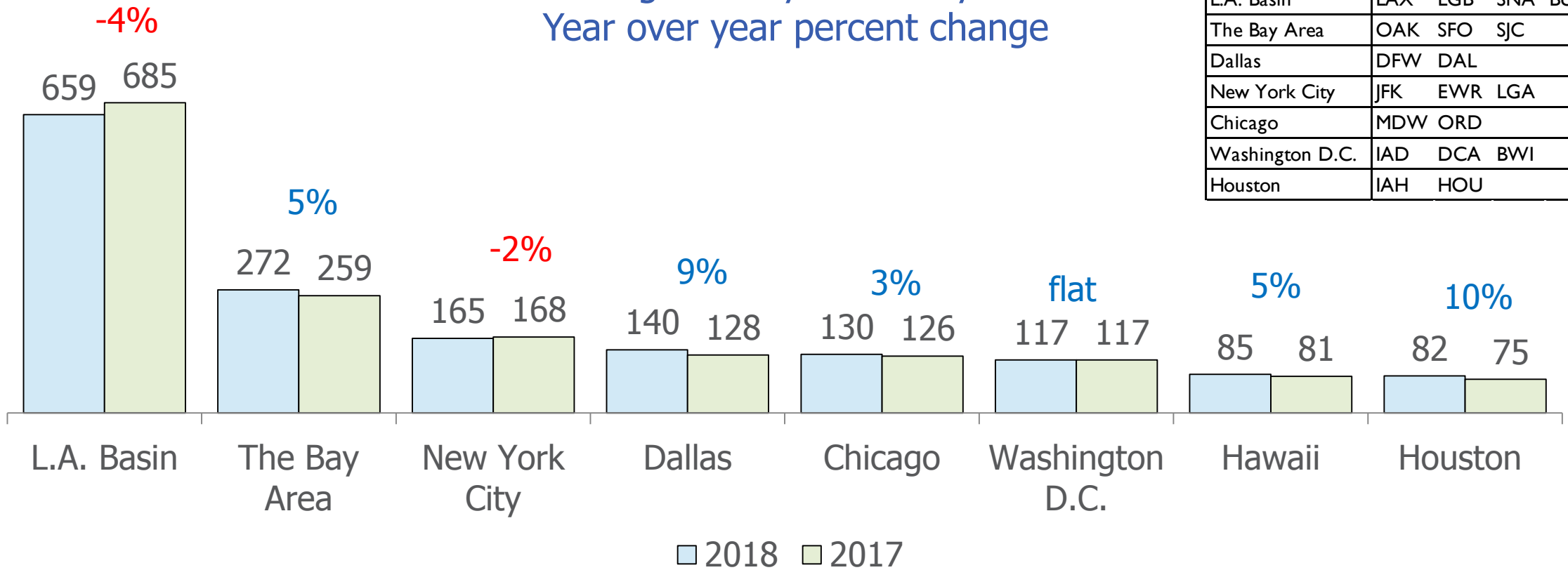
American Airlines

- Chicago, Dallas



RNO – O&D Passengers Metro Area

Passengers Daily Each Way 2018
Year over year percent change



L.A. Basin	LAX	LGB	SNA	BUR	ONT
The Bay Area	OAK	SFO	SJC		
Dallas	DFW	DAL			
New York City	JFK	EWR	LGA		
Chicago	MDW	ORD			
Washington D.C.	IAD	DCA	BWI		
Houston	IAH	HOU			

Source: U.S. DOT O&D Passenger Survey, Year 2018

What is Air Service Development?

Passenger and Cargo

- Maintenance of Existing
- Growth
 - New Routes
 - Additional Capacity

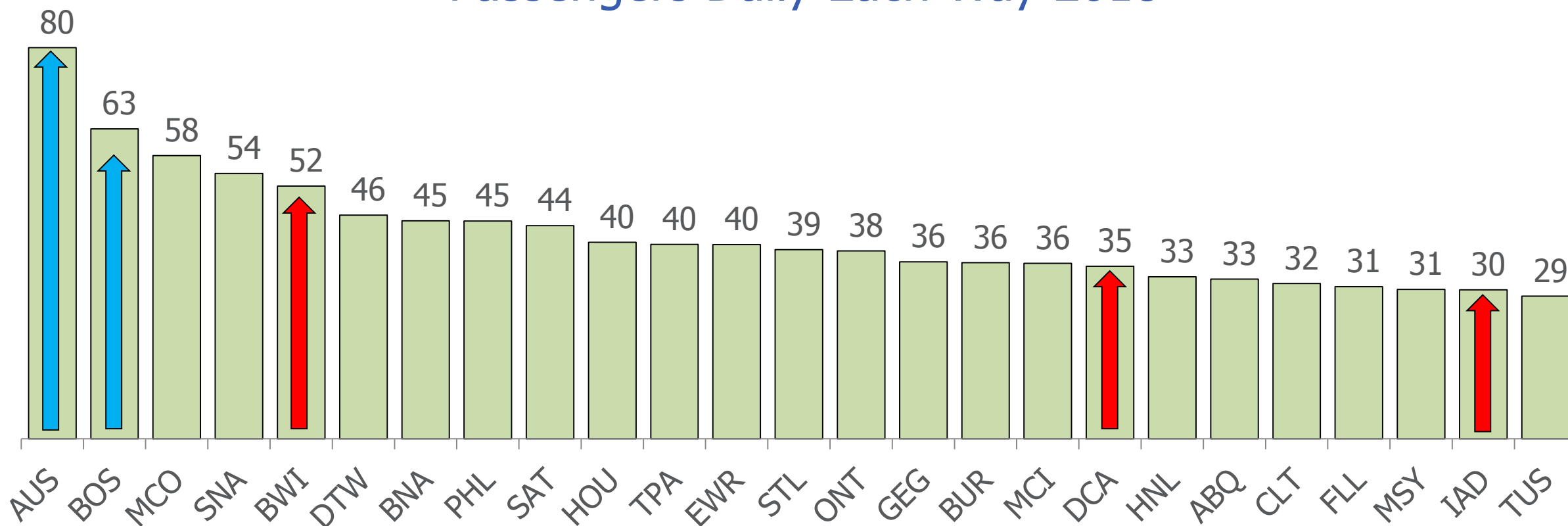
Airline Relationships

Community Engagement



Unserved Markets

Passengers Daily Each Way 2018



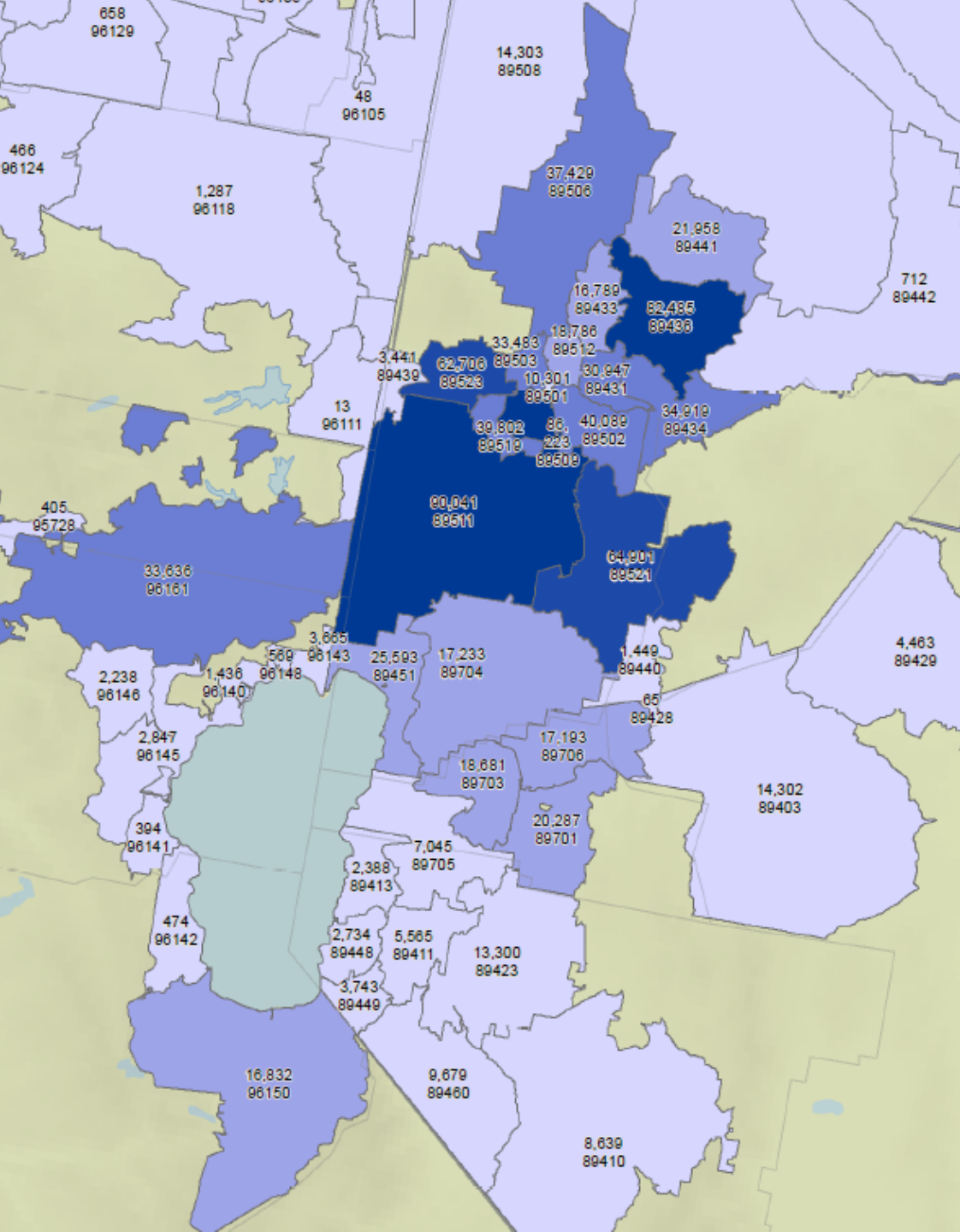
Source: U.S. DOT O&D Passenger Survey via Diio mi

Target Markets Domestic and International

- Boston
- L.A. Basin
- Washington D.C.
- Austin
- Orlando
- Elko
 - Nevada Air Service Development Bill 2019, AB 242
 - Small Community Air Service Development Program
- Hawaii
- Seasonal Markets
- International
 - Mexico
 - Canada
 - Europe
- Other
 - Discussion Markets
 - Regional Short Haul



Originating Traffic 2018



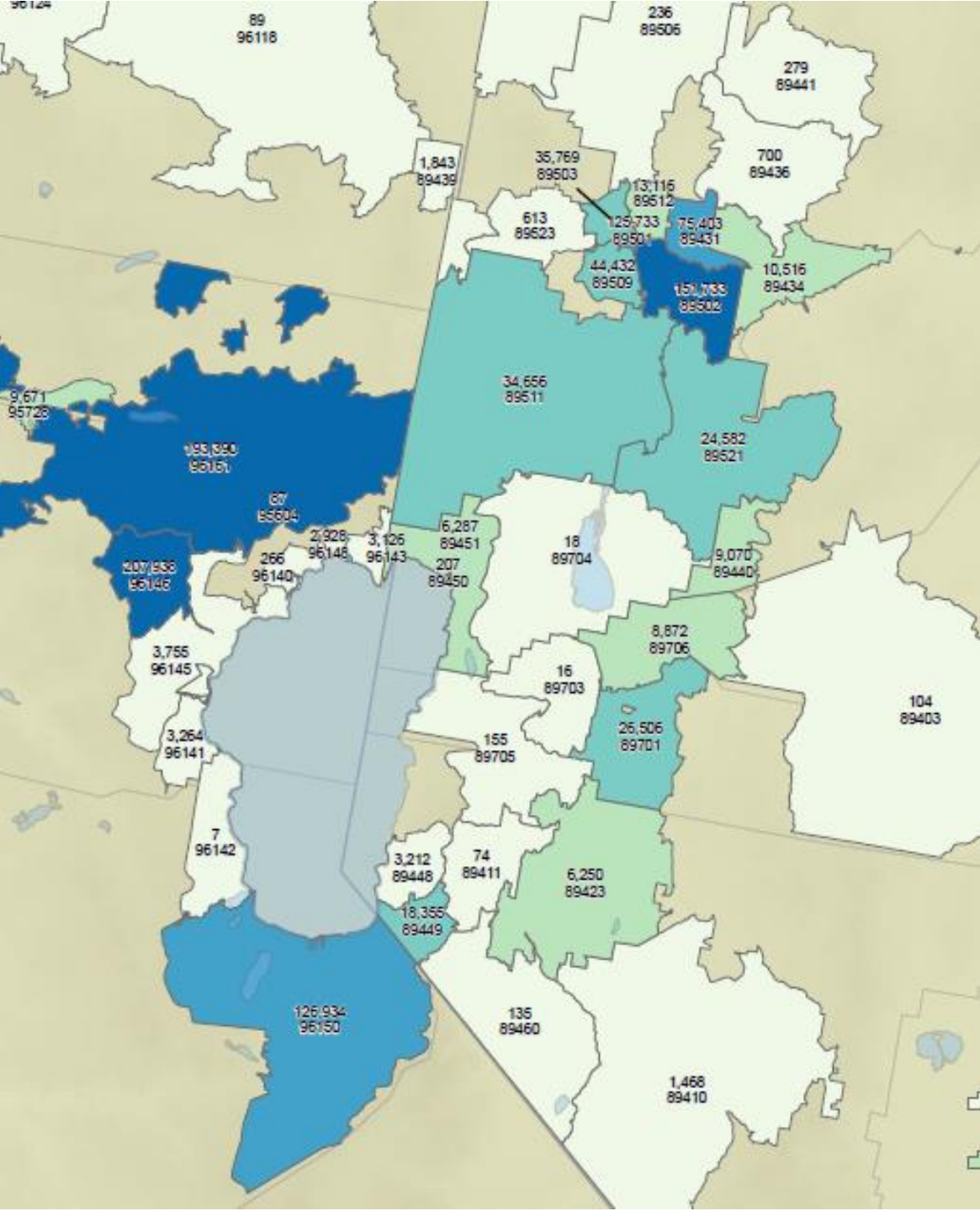
City	Originators
RENO	501,107
SPARKS	170,309
CARSON CITY	63,205
TRUCKEE	33,636
INCLINE VILLAGE	25,879
GARDNERVILLE	18,319
WASHOE VALLEY	17,233
SOUTH LAKE TAHOE	16,832
SUN VALLEY	16,789
FERNLEY	15,945
DAYTON	14,302
MINDEN	13,300
GENOA	5,565
SILVER SPRINGS	4,463
STATELINE	3,743
KINGS BEACH	3,665
VERDI	3,441
TAHOE CITY	2,847
ZEPHYR COVE	2,734
GLENBROOK	2,388
OLYMPIC VALLEY	2,238
PORTOLA	1,840
Other	10,298

Departing traffic of passengers who live within 50-mile radius of RNO (ONE WAY)

Source: Airline Data Inc., using:

- Internet Search Data, provides higher level of confidence in zip code assignment of the O&D
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Visiting Traffic 2018



City	Visitors
RENO	430,985
OLYMPIC VALLEY	207,938
TRUCKEE	193,390
SOUTH LAKE TAHOE	126,934
SPARKS	86,899
CARSON CITY	35,549
STATELINE	18,355
SODA SPRINGS	9,671
VIRGINIA CITY	9,070
INCLINE VILLAGE	6,495
MINDEN	6,250
TAHOE CITY	3,755
HOMEWOOD	3,264
ZEPHYR COVE	3,212
KINGS BEACH	3,126
TAHOE VISTA	2,928
VERDI	1,843
PORTOLA	1,627
GARDNERVILLE	1,602
Other	1,389

Arriving traffic of passengers who visit within 50-mile radius of RNO (ONE WAY)

Source: Airline Data Inc., using:

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Community Engagement

Continue community education Continued outreach through grass-roots efforts

- Presentations to community groups - Air Service 101s
- Participation in chambers and business organizations
- Weekly fare-sale communication - RNO Explorer
- Local special events booths



Regional Air Service Corporation (RASC)

Private/public marketing consortium to support Air Service Development

- Signatory for airline contracts
- Marketing support for new and current routes



Mission: Grow and sustain business and leisure air service for the Reno-Tahoe region.

Partners:

- Reno-Tahoe Airport Authority
- Nevada Commission on Tourism
- Truckee-Tahoe Airport
- Reno-Tahoe Territory
- Ski Lake Tahoe (Heavenly, Northstar, Mt. Rose, Kirkwood, Sierra at Tahoe, Alpine/Squaw)
- The City of Reno
- The City of Sparks
- 8 Hotel Resorts
 - Atlantis
 - Circus Circus
 - Eldorado
 - Harrah's
 - Grand Sierra
 - Peppermill
 - Silver Legacy
 - The Nugget
- 6 Convention and Visitor Bureaus
 - Reno-Sparks Convention and Visitors Authority
 - Incline Village/Crystal Bay Visitors Bureau
 - Lake Tahoe
 - Tahoe-Douglas Visitors Authority
 - North Lake Tahoe Resort Association
 - Visit Truckee
- Truckee North Tahoe Transportation Mgmt.
- Squaw / Alpine
- Economic Development Authority of Western Nevada
- NV Energy
- The Reno-Sparks Chamber of Commerce
- Switch



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Questions