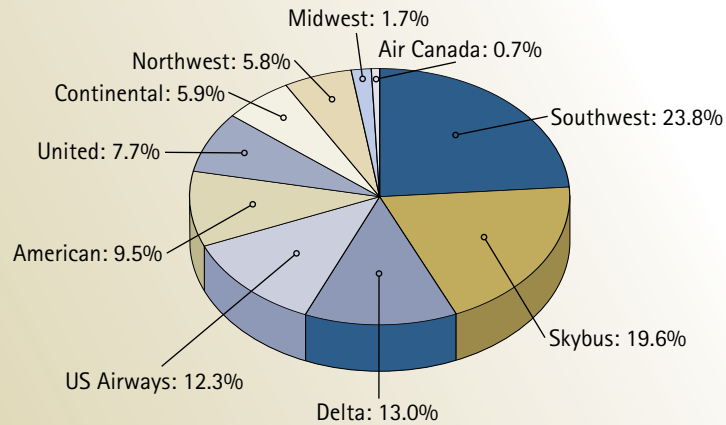


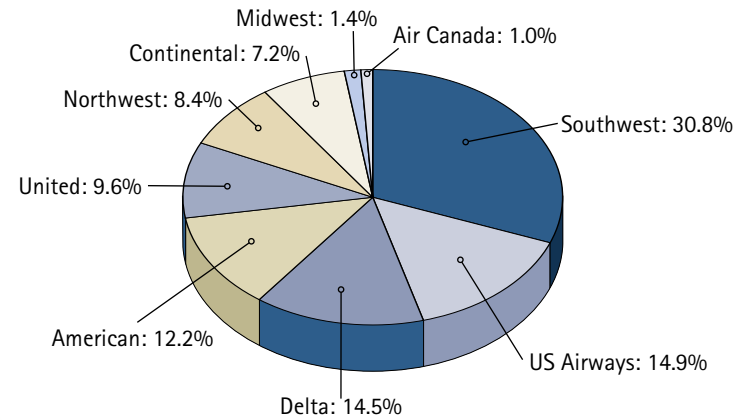
# CMH Airline Market Share

Airline market share percentages will shuffle following Skybus' departure. Pending approval of the Delta/Northwest merger and the potential of other mergers, the market share wheel may reconfigure itself again. For now, we expect Southwest, US Airways and Delta to be second quarter leaders.

## 1st Quarter 2008 Seats



## 2nd Quarter 2008 Seats



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# CMH AIRSPACE

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## Industry Trends Strike Home

### Low Cost Commitment Continues

On the heels of record passenger growth at Port Columbus, ominous aviation trends hit home with Skybus' surprise April 4th announcement. Citing high fuel costs and a weakening national economy, the Columbus-based airline ceased operation after emerging as the second largest carrier in the first quarter 2008. Skybus had grown to employ 350 people locally and operate 24 daily departures over 10 months, serving a total of 973,790 passengers from May 2007 through March 2008.

Prolonged high jet fuel prices have risen 66 percent in the first quarter and nearly 217 percent since 2000. In response, airlines nationwide have been shrinking capacity, cutting jobs, parking and selling planes, imposing fees, raising fares, reducing aircraft weight, considering mergers and filing bankruptcy.

"Now more than ever Port Columbus remains committed to help ease the financial burdens for our carriers," said David Whitaker, Vice President of Business Development & Communications. "After 9/11 and America West's exit in 2004, the Airport Authority shouldered the cost burden rather than distribute it among CMH airlines. It is our hope to repeat that course of action for our airline partners in the current situation."

Port Columbus has prudently managed operating costs to minimize airline fees. The chart below demonstrates our commitment, showing that the 2008 budgeted cost per enplaned passenger is 10 percent lower than 2003.

"Even in the midst of difficult economic conditions over the last several years, Port Columbus has managed to keep our costs and fees low," Whitaker affirmed. "As long as feasibly possible, we'll operate at or near these rates in order to facilitate the strength and growth of our carriers."

Cost Per Enplaned Passenger at CMH					
2008*	2007	2006	2005	2004	
\$5.98	\$5.94	\$5.62	\$4.99	\$5.67	
2003	2002	2001	2000	1999	1998
\$6.64	\$5.46	\$5.18	\$5.58	\$5.03	\$5.11

\*Budgeted

## STAYING CONNECTED

The aviation industry is never without challenges and opportunities. While the Skybus departure creates a setback and merger mania will have some impact on CMH, our airport has an impressive track record of rebounding from dramatic change. We're reminded of TWA's once powerful CMH presence, the effects of 9/11, America West reducing service from nearly 50 flights per day to four, and now the Skybus exit.

Decade after decade the Columbus market has proven itself resilient because of the strength of our local economy. We'll continue to rebuild CMH's air service on this economic strong point. As we proceed to focus attention on existing domestic and international growth opportunities, our optimism is propelled by others who share positive perspectives for Columbus. See what we mean by reading "This Just In" on page three, which points out economic growth factors that help support our air service initiatives.

Additionally, vital partnerships with our airlines, travel retailers and major corporations involved in our Air Service Development Committee have also made crucial differences for Port Columbus. In the past several years these partnerships helped CMH rise above air service challenges impacting our community.

Partnership support, the local economy and CMH's successful track record lead to cautious optimism for the short-term and a confident long-term outlook. Ten airlines currently offer 167 daily and one weekly departure to 35 non-stop destinations. This provides a strong foundation of high-quality air service from which we can successfully grow CMH's future.

Best regards,

*David Whitaker*  
David Whitaker  
Vice President  
Business Development  
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(614) 239-5028

*John Malabad*  
John Malabad  
Manager  
Business Development  
(614) 238-7812



# CMH Air Service Update

Port Columbus offers 167 daily and 1 weekly departure to 35 airports by 10 airlines.

		Air Canada	American	Continental	Delta	Midwest	Northwest	Southwest	United	US Airways	Apple Vacations*	Totals
Atlanta, GA	ATL				8							8
Baltimore, MD	BWI							5				5
Boston, MA	BOS		2	3								5
Cancun (weekly)	CUN										1	1
Charlotte, NC	CLT									7		7
Chicago, IL (Midway)	MDW							8				8
Chicago, IL (O'Hare)	ORD		9						7			16
Cincinnati, OH	CVG				7							7
Cleveland OH	CLE			4								4
Dallas/Ft. Worth, TX	DFW		5									5
Denver, CO	DEN								3			3
Detroit, MI	DTW						6					6
Fort Myers, FL	RSW				1							1
Hartford, CT	BDL				2							2
Houston, TX	IAH			5								5
Las Vegas, NV	LAS							2		2		4
Los Angeles, CA (LAX)**	LAX				0							0
Memphis, TN	MEM						3					3
Miami, FL	MIA		1									1
Milwaukee, WI	MKE					4						4
Minneapolis, MN	MSP						3					3
Nashville, TN	BNA							2				2
New York, NY (Kennedy)	JFK				3							3
New York, NY (LaGuardia)	LGA		5	4						5		14
New York, NY (Newark)	EWL			6								6
Orlando, FL	MCO				2			3				5
Philadelphia, PA	PHL							3		6		9
Phoenix, AZ	PHX							1		2		3
Raleigh/Durham, NC	RDU		2									2
Salt Lake City, UT	SLC				1							1
St. Louis, MO	STL		4					2				6
Tampa/St. Petersburg, FL	TPA				1			3				4
Toronto, ONT, Canada	YYZ	3										3
Washington, DC (Dulles)	IAD								5			5
Washington, DC (National)	DCA				2					5		7
<b>Total</b>		<b>3</b>	<b>28</b>	<b>15</b>	<b>34</b>	<b>4</b>	<b>12</b>	<b>29</b>	<b>15</b>	<b>27</b>	<b>1</b>	<b>168</b>

\* Operated by Aeromexico \*\* Service resumes in June

April 2008

# Target Market Opportunities

Although CMH passenger growth will be affected by Skybus' exit, expanded catchment boundaries and choice target (large or unserved) markets present possibilities for other airlines to capitalize on when the time is right for them. Available incentives include cash for marketing plus waived landing fees. For more details about these marketing incentives, contact John Malabad (614) 238-7812.

Local Rank	Reference City	PPDEW*
13	Fort Lauderdale, FL	233
19	San Diego, CA	150
22	Burbank, CA	146
24	Fort Myers, FL	122
25	Portsmouth, NH	121
26	Kansas City, MO	119
27	Oakland, CA	112
28	Seattle/Tacoma, WA	111
31	Richmond, VA	92
33	San Francisco, CA	79
34	Greensboro, NC	79
36	Portland, OR	74
37	San Antonio, TX	68
38	Austin, TX	68
39	Hartford, CT	68
41	West Palm Beach, FL	66
42	Bellingham, WA	65
43	Jacksonville, FL	64
44	Santa Ana, CA	63
47	Sacramento, CA	60
48	New Orleans, LA	57
49	St. Augustine, FL	55

\*Passengers Per Day Each Way  
Source: DOT data, 12-Month ending, 4Q 2007 per Official Airline Guide

# THIS JUST IN!

## NetJets chooses Columbus as major expansion site

Strategic partnerships were key to NetJets and Flight Safety's decision to stay in Columbus and build a world-class campus adjacent to Port Columbus. NetJets, a worldwide leader in private aviation, seeks to develop an aeronautical cluster that will attract the best and brightest talent. Sister company Flight Safety International, the world's largest provider of aviation training, will double in size. Combined job creation will approximate 810 new high-wage positions.



## Columbus 2007 population shows 8.8% growth

The Columbus Metropolitan Statistical Area (MSA) population totals 1,754,337 compared to the U.S. Census Bureau 2000 figure of 1,612,694, which represents an 8.8 percent increase.

## Columbus MSA gains nearly 12,000 jobs

U.S. Bureau of Labor Statistics shows that employment in Columbus' 8-county MSA grew by 1.3 percent to 943,600 jobs – the highest rate of growth since 2000 – exceeding national growth. The transportation and distribution sector increased by 2,900 jobs or 9.2 percent – more than double the increase in 2006.



## Port Columbus development district tops funding wish list

An April 2 *Columbus Dispatch* story reported that a new, \$5 million general aviation business cluster at Port Columbus tops a 12-project, \$24.25 million state capital construction budget wish list. Port Columbus is viewed as the next big job generator in the Columbus community according to Robert H. Milbourne, chief executive officer of the Columbus Partnership which helped prioritize Franklin County's wish list.

## Columbus #1 up-and-coming tech city

Columbus topped the list of tech hubs published recently by *Forbes.com*. Cities earned their ranking based on a potent recipe mixing hearty helpings of money, leadership, commitment and vision. Columbus-based Battelle, an international science and technology enterprise, was recognized as a force in almost every area of emerging technology, especially life sciences and energy research.

## Rickenbacker Intermodal Terminal opened in March

More than 20,000 new jobs and \$15.1 billion in economic impact are expected over the next 30 years as a result of Norfolk Southern's new Rickenbacker Intermodal Terminal, which facilitates the movement of cargo between trains and trucks.

## Ohio ranked tops for corporate expansion

For the second consecutive year, *Site Selection* magazine awarded Ohio its Governor's Cup for having 399 new and expanded corporate facilities recorded in 2007. Corporate real estate analysts regard the magazine's yearly analyses as the industry scoreboard. Lining up behind Ohio in the annual ranking were Illinois (362), Tennessee (293), North Carolina (291) and Texas (281).

