

SAVANNAH HILTON HEAD INTERNATIONAL



Airport Update- 2014

*Greg B. Kelly, AAE
Executive Director*



Savannah Airport Commission Structure

- Independent Entity of the City of Savannah
- Five Member Board

Greg B. Kelly, Executive Director

John F. Rauback , Asst. Executive Director

Sylvester Formey, Chairman

Stephen S. Green, Vice Chairman

Sheldon Tenenbaum, Board Member

Shirley B. James, Board Member

Lois Wooten, Board Member

James B. Blackburn, Legal Counsel



Airport Structure

Mini- City:

❖ Police, Fire, Public Works and Administration.



Military Presence at the Airport

- ❖ Combat Readiness Training Center
- ❖ 165th Air National Guard
- ❖ Civil Air Patrol
- ❖ Third Infantry Division
 - ❖ Fort Stewart
 - ❖ Hunter Army Airfield
- ❖ US Customs & Border Patrol
- ❖ United States Marine Corps
- ❖ USO



Why are we an “International” Airport?

Port of Entry



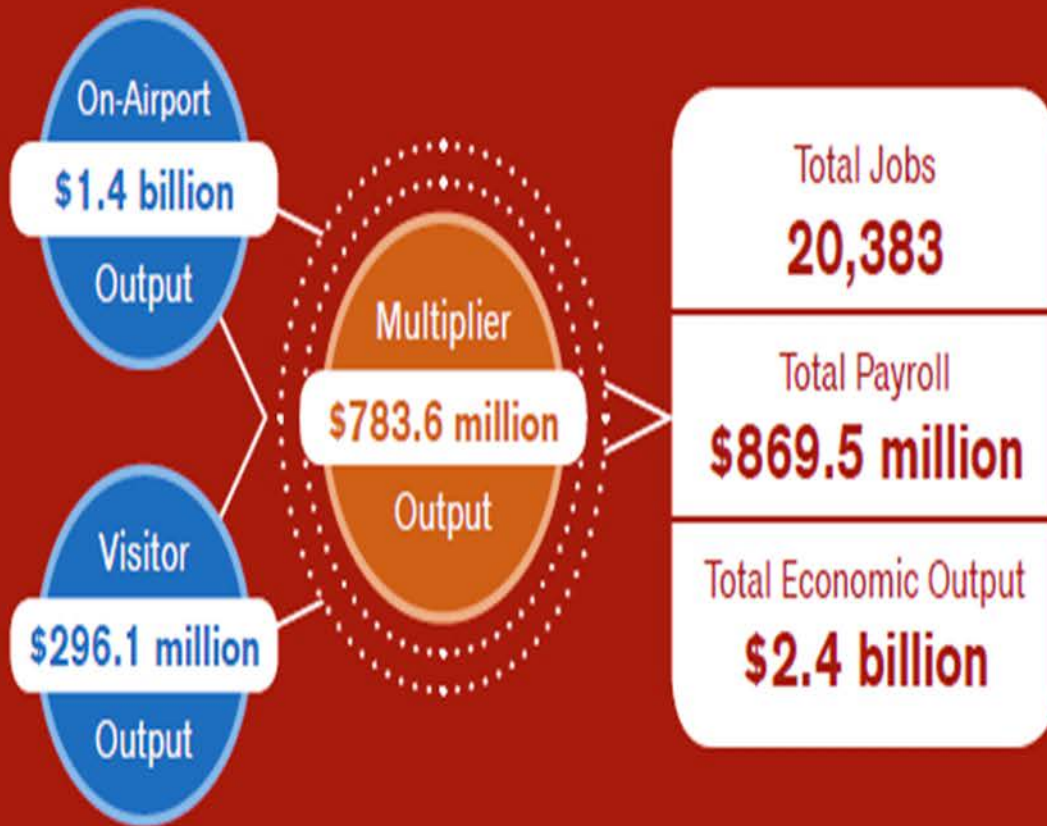
ATLANTA

Landing Rights



SAVANNAH-HILTON HEAD

Economic Impact of Savannah-Hilton Head International Airport



Jobs measures the number of full-time equivalent jobs where a part-time employee counts as half a full-time employee.

Payroll measures the total annual wages and benefits paid to all workers whose salaries are directly attributable to airport activity.

Economic Output measures the value of goods and services related to the airport.

*Economic Impact of Savannah
Hilton- Head International Airport,
Georgia Dept. of Transportation*

Savannah, GA

The Home of Gulfstream Aerospace Corp.



Gulfstream Aerospace Corporation is the largest tenant at the Savannah/Hilton Head International Airport.

Gulfstream's \$500m Expansion



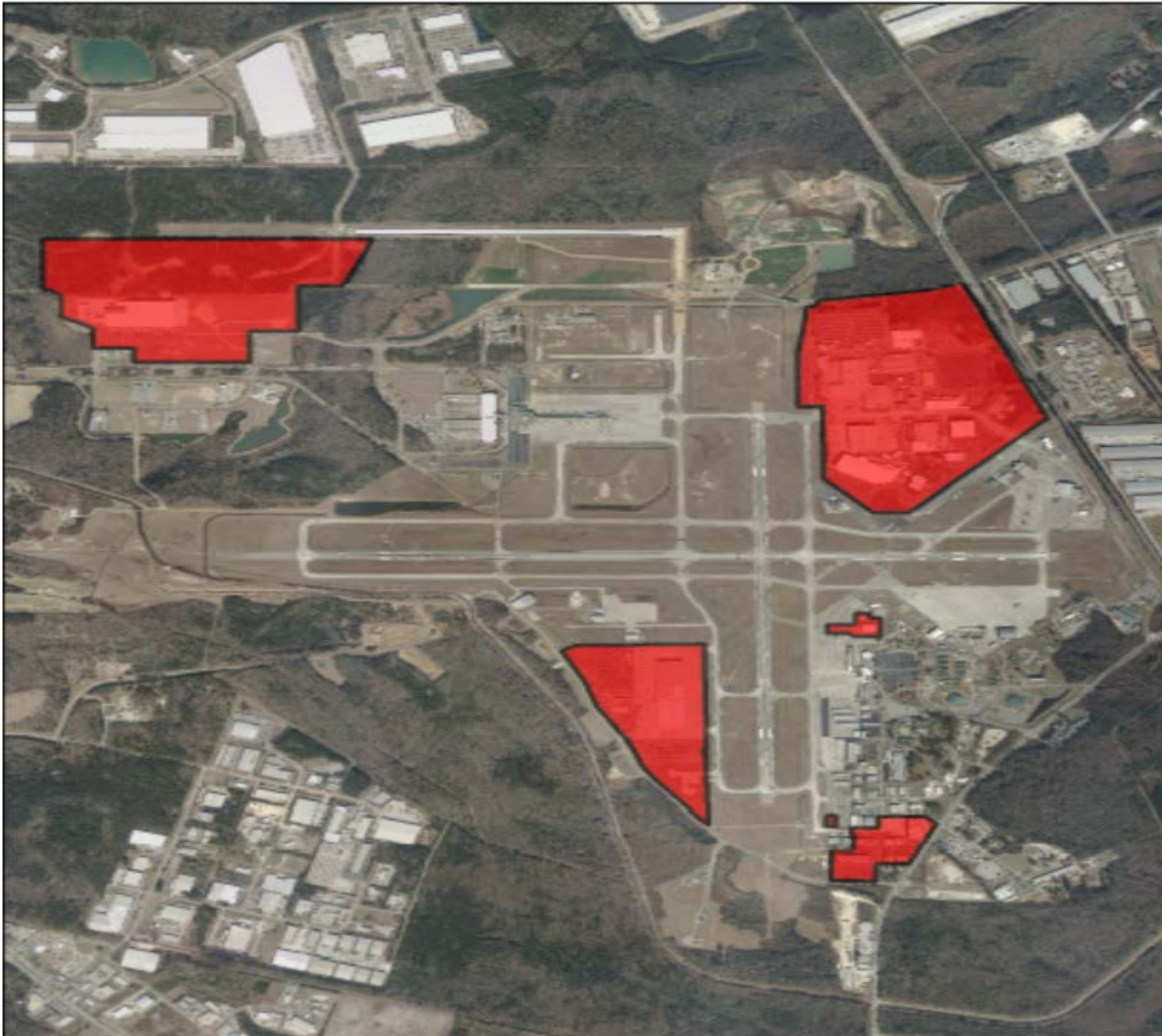
Gulfstream®
A GENERAL DYNAMICS COMPANY

Gulfstream Aerospace Corporation
Gulfstream Facility
Savannah, Georgia
March 20, 2012

North Aviation Development



GULFSTREAM'S LEASED/OWNED PROPERTIES



Gulfstream Facility Expansion Employment Impact

Employment Totals as of December 2013

Savannah	Direct	8,021
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Savannah	Contract Workers	1,361
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Savannah	Total	9,382
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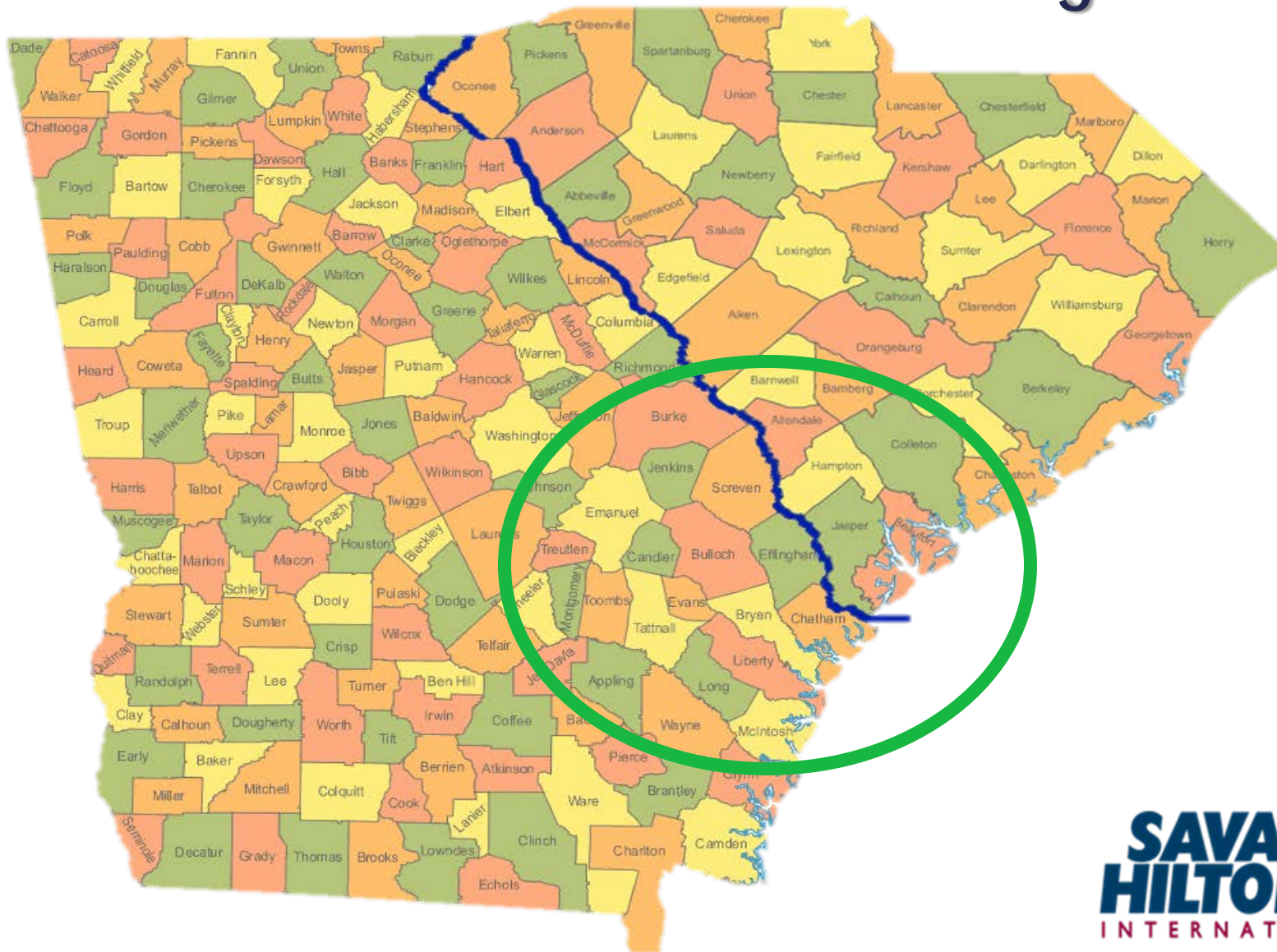
Brunswick	Direct and Contract	199
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Georgia	Total	9,581
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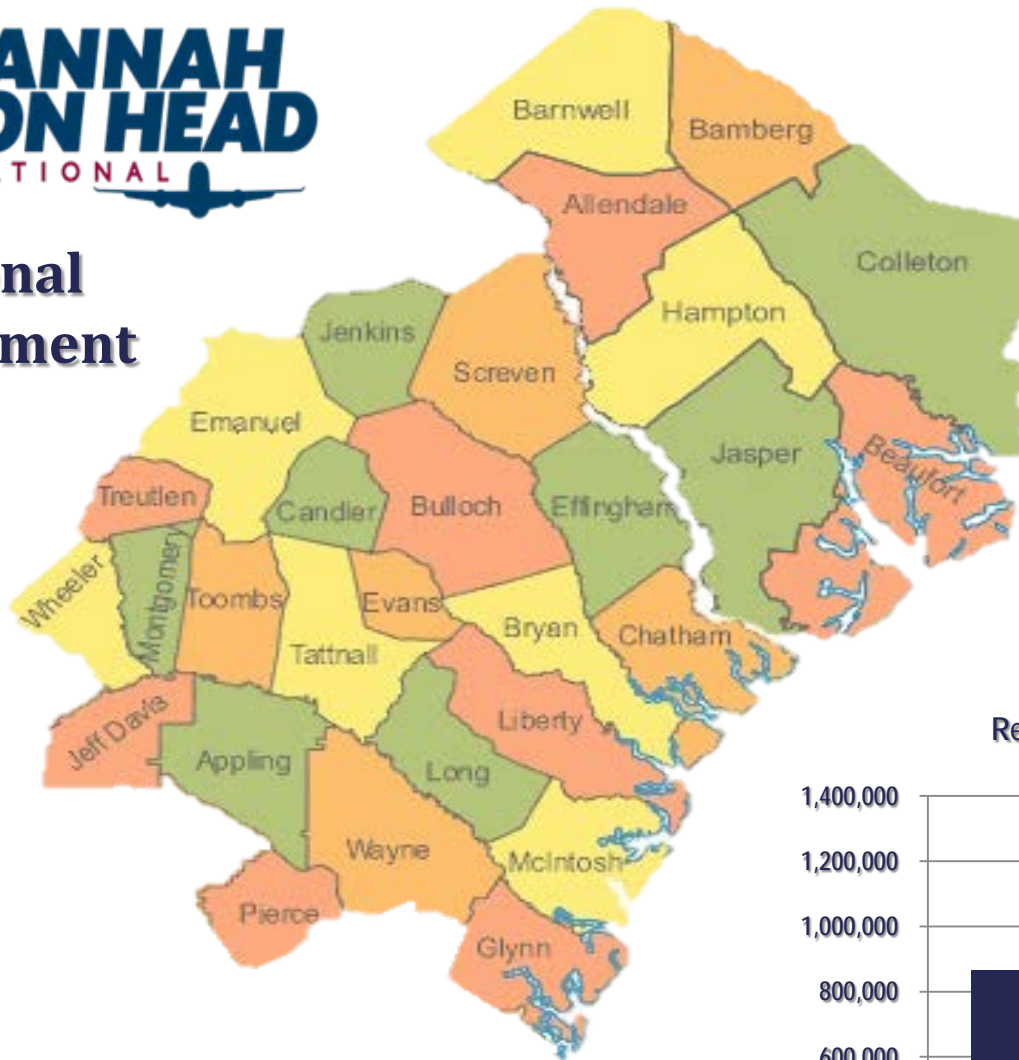
South Carolina (Residents)	Total	423
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Georgia and South Carolina

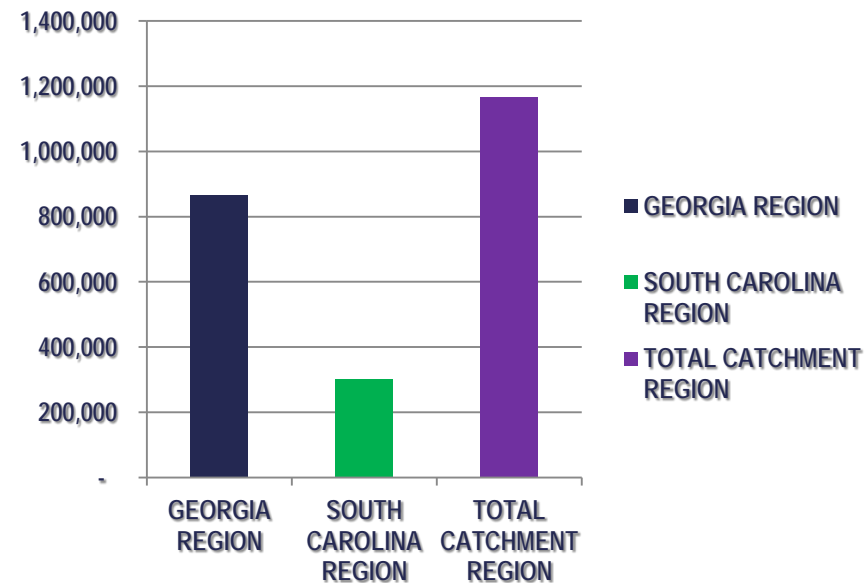
A Closer Look at Our Region



Regional Catchment Area



Regional Catchment Area



The Pursuit of JetBlue



The Incentive Package

Airport Incentive Package:

\$2.1 Million Dollars

External Marketing Incentive Package:

\$500,000 Dollars

SCASD Grant

\$500,000 Dollars

A Team Effort



HILTON HEAD ISLAND-BLUFFTON
CHAMBER OF COMMERCE



The jetBlue[®] Effect

Competitive Airfares

Additional Seats

FROM

Savannah / Hilton Head (SAV)

TO

New York City, NY (JFK)

1 Adults

0 Kids

0 Lap infants

UPDATE

Special assistance 8+ travelers, pets, baggage policy, kids, lap infants, FAQs.

(Under 14)

(Under 2)

1 SELECT DEPART DAY

2 SELECT RETURN DAY



NOV

DECEMBER



JAN



SUNDAY

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

30

1

FROM
\$166
ONE-WAY/PP

2

FROM
\$114
ONE-WAY/PP

3

FROM
\$114
ONE-WAY/PP

4

FROM
\$114
ONE-WAY/PP

5

FROM
\$114
ONE-WAY/PP

6

FROM
\$114
ONE-WAY/PP

7

FROM
\$124
ONE-WAY/PP

8

FROM
\$94
ONE-WAY/PP

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FROM
\$69
ONE-WAY/PP

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ONE-WAY/PP

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ONE-WAY/PP

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FROM
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ONE-WAY/PP

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ONE-WAY/PP

15

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\$94
ONE-WAY/PP

16

FROM
\$67
ONE-WAY/PP

17

FROM
\$69
ONE-WAY/PP

18

FROM
\$69
ONE-WAY/PP

19

FROM
\$144
ONE-WAY/PP

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ONE-WAY/PP

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ONE-WAY/PP

26

FROM
\$94
ONE-WAY/PP

27

FROM
\$166
ONE-WAY/PP

28

FROM
\$166
ONE-WAY/PP

29

FROM
\$144
ONE-WAY/PP

30

FROM
\$166
ONE-WAY/PP

31

FROM
\$112
ONE-WAY/PP

1



3

jetBlue®

FROM

SAV

TO

JFK

EARLIEST TRAVEL DATE

12/01/2014

PASSENGERS

1

FLIGHT

Round Trip

One Way

CALENDAR VIEW

Flexible Days

5 Weeks

SHOW BEST FARES FOR

Economy

First Class

SHOW ONLY

Nonstop

All Flights

UPDATE RESULTS

Advanced Search

More Options

The prices shown are per passenger. Some of the prices listed may be **Basic Economy** fares. Please review restrictions before booking. Please select a date from the calendar to view flight results for the selected duration.

LOWEST

SELECTED DATES

NOV / DEC						
SUN	MON	TUE	WED	THU	FRI	SAT
NOV 23	NOV 24	NOV 25	NOV 26	NOV 27	NOV 28	NOV 29
\$338.10	\$143.10	\$143.10	\$143.10	\$143.10	\$196.60	\$338.10
NOV 30	DEC 1	DEC 2	DEC 3	DEC 4	DEC 5	DEC 6
\$513.10	\$221.60	\$113.10	\$113.10	\$113.10	\$113.10	\$113.10
DEC 7	DEC 8	DEC 9	DEC 10	DEC 11	DEC 12	DEC 13
\$113.10	\$93.10	\$73.10	\$73.10	\$93.10	\$73.10	\$73.10
DEC 14	DEC 15	DEC 16	DEC 17	DEC 18	DEC 19	DEC 20
\$93.10	\$93.10	\$73.10	\$73.10	\$73.10	\$123.10	\$93.10
DEC 21	DEC 22	DEC 23	DEC 24	DEC 25	DEC 26	DEC 27
\$93.10	\$93.10	\$73.10	\$73.10	\$73.10	\$93.10	\$188.10

FROM Savannah / Hilton Head (SAV) TO Boston, MA (BOS) 1 Adults 0 Kids 0 Lap infants UPDATE

Special assistance 8+ travelers, pets, baggage policy, kids, lap infants, FAQs...

(Under 14)

(Under 2)

1 SELECT DEPART DAY

2 SELECT RETURN DAY

← NOV

DECEMBER

JAN →

SUNDAY

MONDAY

TUESDAY

WEDNESDAY

THURSDAY

FRIDAY

SATURDAY

30

1

2

3

4

5

6

FROM
\$306
ONE-WAY/PP

FROM
\$135
ONE-WAY/PP

FROM
\$124
ONE-WAY/PP

FROM
\$134
ONE-WAY/PP

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ONE-WAY/PP

FROM
\$124
ONE-WAY/PP

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FROM
\$154
ONE-WAY/PP

FROM
\$184
ONE-WAY/PP

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ONE-WAY/PP

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ONE-WAY/PP

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ONE-WAY/PP

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ONE-WAY/PP

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\$274
ONE-WAY/PP

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FROM
\$115
ONE-WAY/PP

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\$115
ONE-WAY/PP

FROM
\$145
ONE-WAY/PP

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\$104
ONE-WAY/PP

FROM
\$115
ONE-WAY/PP

FROM
\$274
ONE-WAY/PP

28

29

30

31

1

2

3

FROM
\$181
ONE-WAY/PP

FROM
\$145
ONE-WAY/PP

FROM
\$337
ONE-WAY/PP

FROM
\$111
ONE-WAY/PP



jetBlue®

FLIGHT

CALENDAR VIEW

SHOW BEST FARES FOR

SHOW ONLY

Round Trip

One Way

Flexible Days

5 Weeks

Economy

First Class

Nonstop

All Flights

UPDATE RESULTS

Advanced Search

More Options

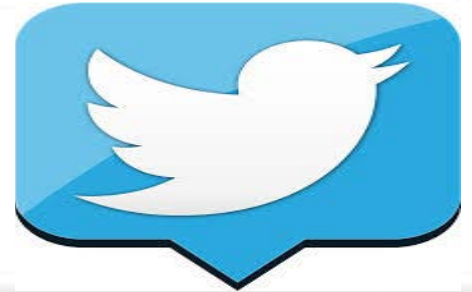
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LOWEST SELECTED DATES

NOV / DEC						
SUN	MON	TUE	WED	THU	FRI	SAT
NOV 23	NOV 24	NOV 25	NOV 26	NOV 27	NOV 28	NOV 29
\$236.60	\$141.60	\$141.60	\$141.60	\$141.60	\$141.60	\$332.60
NOV 30	DEC 1	DEC 2	DEC 3	DEC 4	DEC 5	DEC 6
\$573.40	\$208.75	\$121.60	\$121.60	\$121.60	\$121.60	\$121.60
DEC 7	DEC 8	DEC 9	DEC 10	DEC 11	DEC 12	DEC 13
\$121.60	\$101.60	\$101.60	\$101.60	\$101.60	\$101.60	\$101.60
DEC 14	DEC 15	DEC 16	DEC 17	DEC 18	DEC 19	DEC 20
\$101.60	\$101.60	\$101.60	\$101.60	\$101.60	\$101.60	\$111.60
DEC 21	DEC 22	DEC 23	DEC 24	DEC 25	DEC 26	DEC 27
\$101.60	\$101.60	\$208.75	\$101.60	\$101.60	\$141.60	\$302.35



User @SAVHHairport



SAV/HHI Intl Airport retweeted



Carl V. Lewis @carlvlewis

3h

Just booked my first ever @JetBlue flight to @SAVHHairport for #SavStPats to visit my old haunts. JAX=more expensive than SAV! [#byedelta](#)

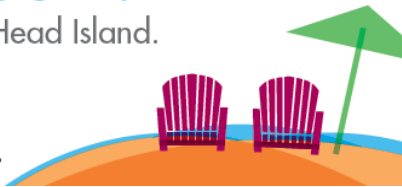
Details



Marketing JetBlue

DIRECT YOURSELF SOUTH.

New nonstops to Savannah/Hilton Head Island.



NEW ROUTES TO OLD CHARM.

Now flying to Savannah/Hilton Head Island.



HILTON HEAD'S IN FULL SWING.

Now flying to Savannah/Hilton Head Island.



COAST DOWN THE COAST.

Now flying to Savannah/Hilton Head Island.



Posted: Thu, 11/06/2014 - 06:47

Updated: Thu, 11/06/2014 - 06:47

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Fares dropping at SAV

 **Share**  **Like**  **Tweet**  **+1**  **Save**  **Share**  **Pint it**



WATCH! • BiS News Video
Video updated throughout the day

By [Mary Carr Mayle](#)

912-652-0324

mary.mayle@savannahnow.com

Just a little more than a year ago, Savannah/Hilton Head International Airport had the dubious distinction of being tied for the fourth highest air fares among the country's top 100 airports.

As recently as the first quarter of this year, the airport's numbers had improved just two places to sixth most expensive.

Then came JetBlue.

The recently released Bureau of Transportation Statistics' numbers for the second quarter of this year — the first full quarter of JetBlue

service — indicate Savannah's fares have dropped 13.7 percent to 25th most expensive.

"This was the largest drop of any of the 100 airports rated," said Lori Lynah, the airport's director of marketing and air service development. "It's a clear indication of the difference having a low-cost carrier makes, especially one as popular as JetBlue."

The ripple effect JetBlue would have on the airport was obvious months before the low-cost carrier actually arrived in February. In anticipation, Delta, United and U.S. Airways added to their Savannah service, giving passengers the weekly option of 45 more flights and 5,000 additional seats.

Once JetBlue started service to Savannah from New York's JFK International and Boston's Logan International, Savannah fares began dropping as other airlines scrambled to compete.

Bureau of Transportation Statistics

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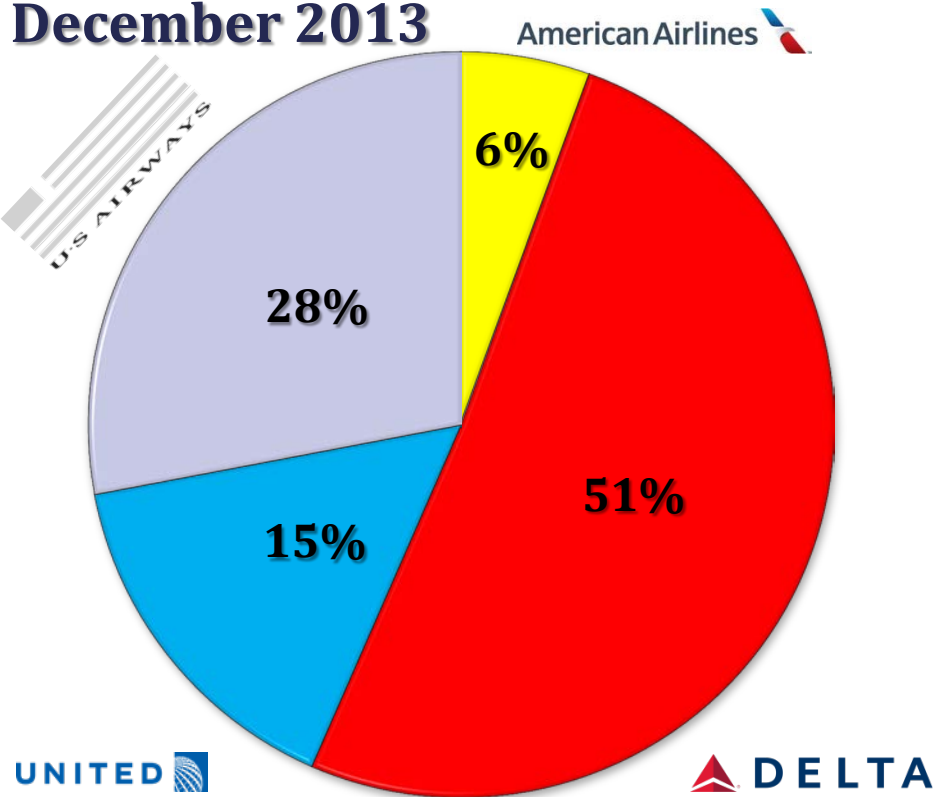
the aircraft. Averages do not include frequent-flyer or "zero fares" or a few abnormally high reported fares.

Top 100 airports* (based on 2013 U.S. originating domestic passengers) ranked by average domestic itinerary fare in 2Q 2014 (2014\$)

Rank	Airport	Inflation-Adjusted Average Domestic Itinerary Fares (2014\$)					Pct. Change	
		2Q 2000	2Q 2011	2Q 2012	2Q 2013	2Q 2014	2000-2014	2013-2014
1	Cincinnati, OH	625.53	502.68	555.64	528.83	523.33	-16.3	-1.0
2	Madison, WI	581.51	464.46	491.16	476.94	511.96	-12.0	7.3
3	Houston Bush, TX	570.23	499.19	537.46	502.49	506.86	-11.1	0.9
4	Washington Dulles	600.77	501.47	523.70	489.75	495.63	-17.5	1.2
5	Jackson/Vicksburg, MS	454.07	445.35	468.55	444.14	491.90	8.3	10.8
6	Newark, NJ	621.82	495.56	498.82	484.47	491.42	-21.0	1.4
7	Pensacola, FL	564.23	430.92	464.17	451.62	475.90	-15.7	5.4
8	Memphis, TN	503.85	502.85	531.71	486.24	466.05	-7.5	-4.2
9	Cleveland, OH	471.36	452.21	472.46	455.75	465.09	-1.3	2.0
10	Knoxville, TN	545.04	468.70	483.21	474.39	464.85	-14.7	-2.0
11	Harrisburg, PA	626.00	475.10	486.56	452.71	462.28	-26.2	2.1
12	Greensboro/High Point, NC	514.49	412.22	446.93	455.36	454.90	-11.6	-0.1
13	Colorado Springs, CO	572.86	437.55	414.18	453.89	451.87	-21.1	-0.4
14	Birmingham, AL	435.50	420.58	420.13	416.87	449.59	3.2	7.9
15	Albany, NY	480.01	446.33	448.25	430.72	448.38	-6.6	4.1
16	Norfolk, VA	528.05	423.46	445.16	415.35	445.49	-15.6	7.3
17	Grand Rapids, MI	583.63	430.11	463.39	444.06	444.48	-23.8	0.1
18	San Francisco, CA	624.61	439.14	442.07	438.28	440.60	-29.5	0.5
19	Tulsa, OK	420.37	437.64	459.12	446.40	438.40	4.3	-1.8
20	Minneapolis, MN	547.58	428.66	466.18	445.93	437.66	-20.1	-1.9
21	Detroit, MI	454.82	406.63	430.56	422.48	436.69	-4.0	3.4
22	Charlotte, NC	671.81	416.22	423.91	413.98	436.45	-35.0	5.4
23	Atlanta, GA	452.41	396.81	380.70	390.98	435.34	-3.8	11.3
24	Philadelphia, PA	583.06	410.46	428.36	414.06	434.63	-25.5	5.0
25	Savannah/Hilton Head	448.66	490.08	519.01	503.36	434.32	-3.2	-13.7
26	Dallas-Fort Worth, TX	606.19	437.92	467.13	425.46	434.12	-28.4	2.0
27	Los Angeles, CA	491.87	421.48	434.10	417.11	430.67	-12.4	3.3
28	Louisville, KY	401.09	412.38	432.09	412.24	425.79	6.2	3.3
29	Richmond, VA	663.22	428.25	440.24	426.61	425.57	-35.8	-0.2
30	Fresno, CA	553.08	443.96	440.56	435.74	422.74	-23.6	-3.0
31	Oklahoma City, OK	429.11	425.39	443.52	416.05	422.55	-1.5	1.6
32	Chicago O'Hare, IL	562.31	403.50	407.37	396.97	420.10	-25.3	5.8
33	Little Rock, AR	417.89	428.30	406.64	402.39	417.57	-0.1	3.8

Passenger Share By Airline

December 2013

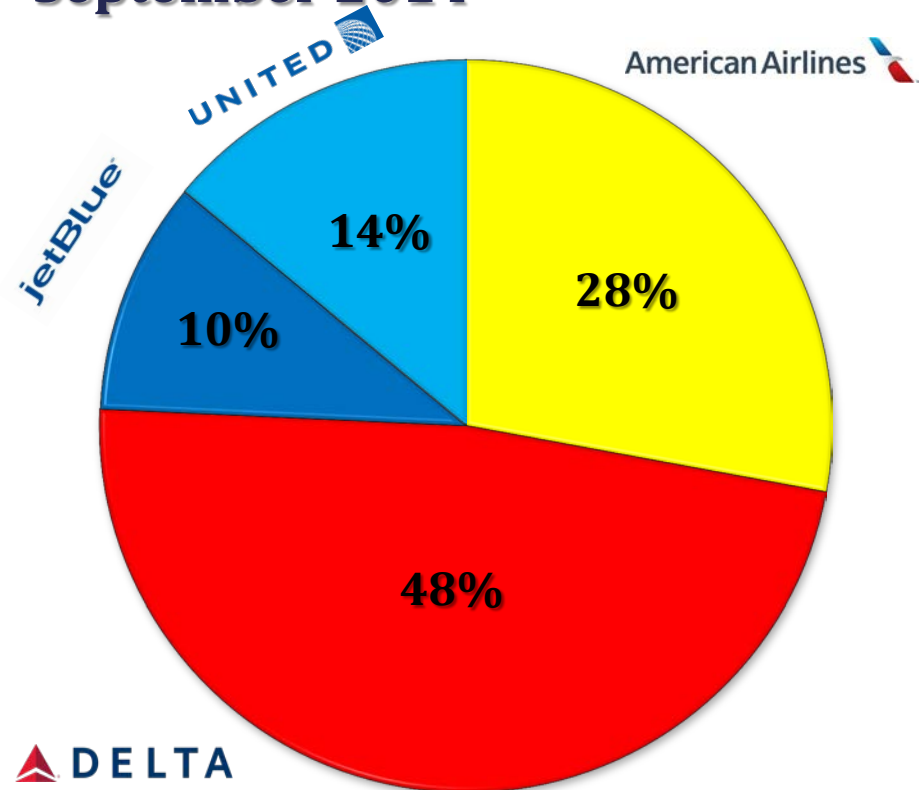


2013 Enplanements: 62,506
2012 Enplanements: 60,373

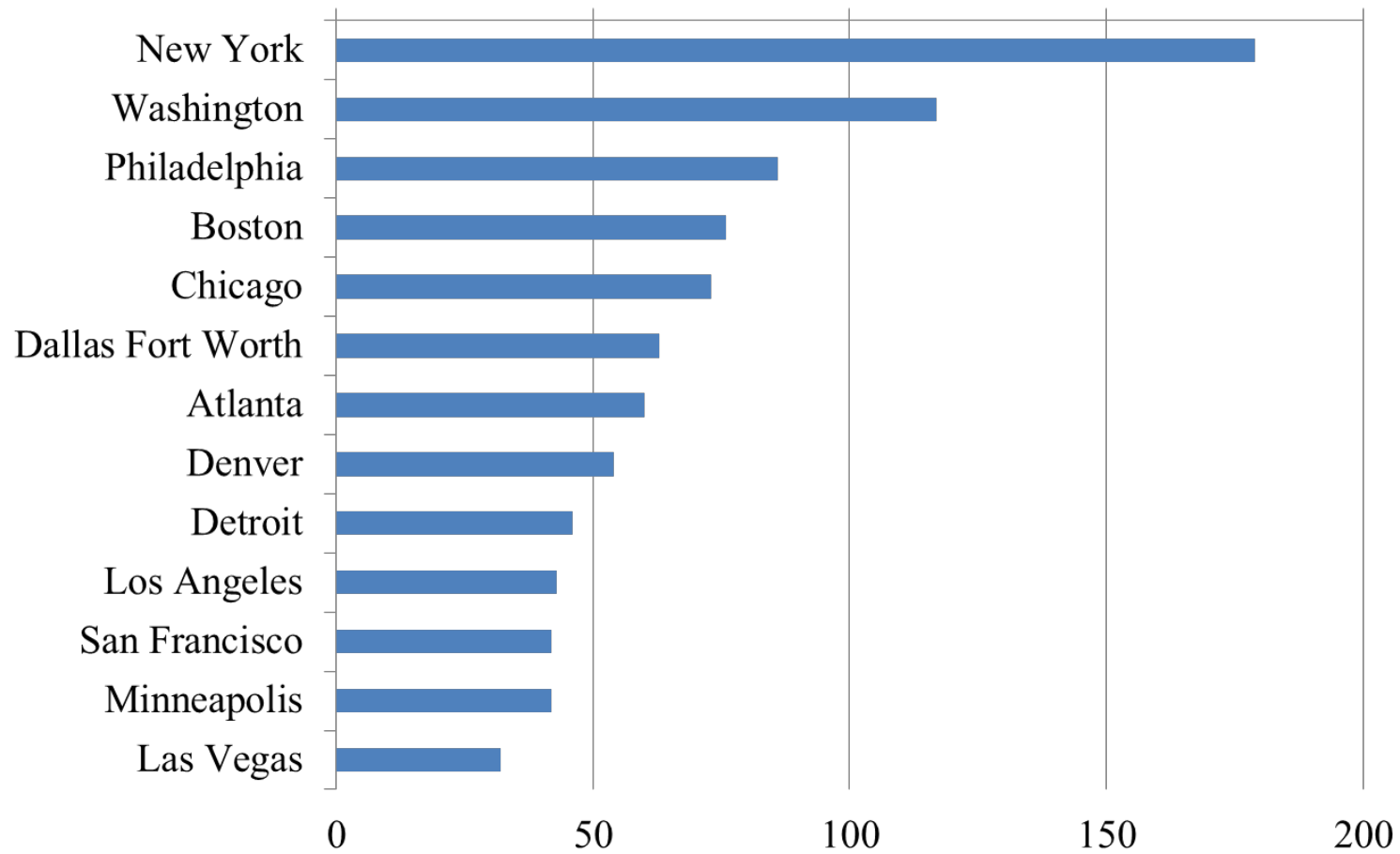
**SAVANNAH
HILTON HEAD**
INTERNATIONAL

2014 Enplanements: 81,209
2013 Enplanements: 68,891

September 2014



Top Markets in Passengers Per Day



Opportunities for Savannah/Hilton Head



**SAVANNAH
HILTON HEAD**
INTERNATIONAL

Savannah Hilton Head International Airport partnered with Ailevon Air Service Consulting. Ailevon will prepare carrier specific presentations and assist SAV in discussions with airline representatives focusing on the following objectives:

- 1. Miami/Ft. Lauderdale Service**
- 2. Canadian Market**
- 3. Monitor and interject as needed throughout the AA/US merger**
- 4. Augmentation of Existing Routes-
Washington/Chicago/Dallas**



Other Airlines

Remaining carriers can be considered niche players.



jet



JetBlue in Savannah/Hilton Head

Allison Miguel | General Manager, SAV





jetBlue





SAV NPS scores are well above fellow JetBlue airports across the system.

SAV is the third highest NPS scoring airport within JetBlue.

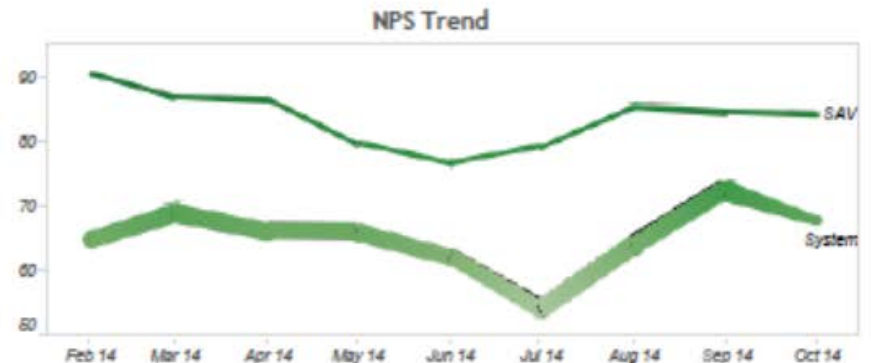
SAV	SYSTEM
82.9	64.9

JetBlue: Savannah (SAV)

Overall, SAV NPS scores well above it's fellow JetBlue airports across the system. SAV is the third highest NPS scoring airport within JetBlue since operations began in February of 2014.

NPS YTD

SAV	System
82.9	64.9



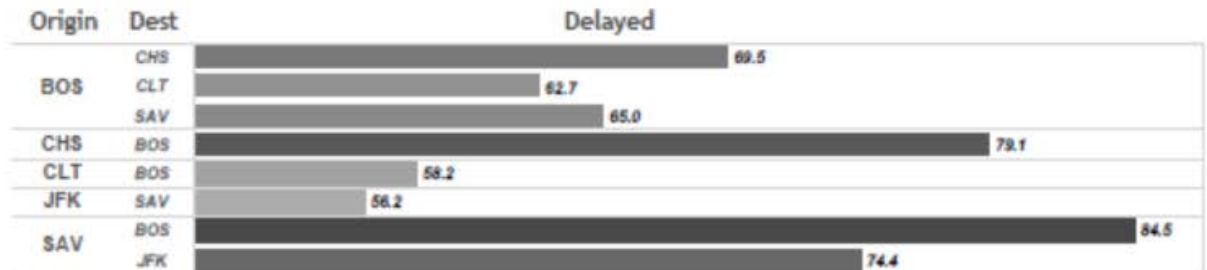
Note: Size of lines reflects survey response count

Comparing Similar Flight Routes

In comparing similar routes, flights are taken from the east region with a medium haul length (700 - 1399 miles). Below are the routes in comparison:

BOS-CLT BOS-CHS
BOS-SAV CLT-BOS
CHS-BOS JFK-SAV
SAV-BOS SAV-JFK

Origin	YTD
BOS	78.9
CHS	81.7
CLT	79.6
JFK	71.4
SAV	82.9



What do you think of JetBlue?





Savannah & Hilton Head.