



SAAA 2022 Airport User Survey Results

MARCH 2, 2023

Savannah Area Aviation Association

Executive Summary

This paper has been authored on behalf of the Savannah Area Aviation Association (SAAA) and is intended to strengthen the collaborative relationship between the Savannah Airport Commission (SAC) and the General Aviation community at the Savannah Hilton-Head International Airport (KSAV).

As a result of changes to the Southeast Quadrant, fueling and storage options have been reduced, and costs have increased significantly as a result. The sublease terminations and facility closures which began last year have already caused some individual and corporate aircraft owners to sell off their aircraft or relocate them to other airports due to cost and inconvenience, which represents a net loss to our community in terms of tax revenue, fuel sales and ancillary services revenues, maintenance and repair revenues, pilot & mechanic employment, and career development opportunities.

This paper presents the results of SAAA's 2022 survey, characterizes some of the storage and access challenges being experienced by the local General Aviation community, explains the community's motivations for continued focus on KSAV, and suggests what may assist the community in continuing to grow and retain sufficient access to the airport to ensure continued viability.

From our survey of approximately 50 local airplane owners and pilots in 2022, KSAV received an overall weighted average of 3.83 on a scale of 0 to 10 (0 being worst and 10 being best) on a variety of factors related to aircraft ownership and storage at KSAV. We know that SAC can improve on this rating by engaging with the General Aviation community, and hope that our efforts can bring about positive change so that the airport's General Aviation facilities can approach the already excellent rating levels of KSAV's Airline Terminal facilities.

We appreciate the Commission & Staff's time and attention in collaborating with us on this matter, and look forward to further work in understanding how conditions can be improved in the years ahead.

Section 1: Background

Introduction

This paper will present results of a user survey that was conducted in December 2022. In order to contextualize these results, we will first present background on the reasons for General Aviation’s continued focus on Savannah Hilton Head International Airport (KSAV). Survey results are contained in Section 2: Survey Results.

KSAV is the only paved, public-use airport in Chatham County. It is also the nearest airport for much of the population of Savannah and its surrounding areas.

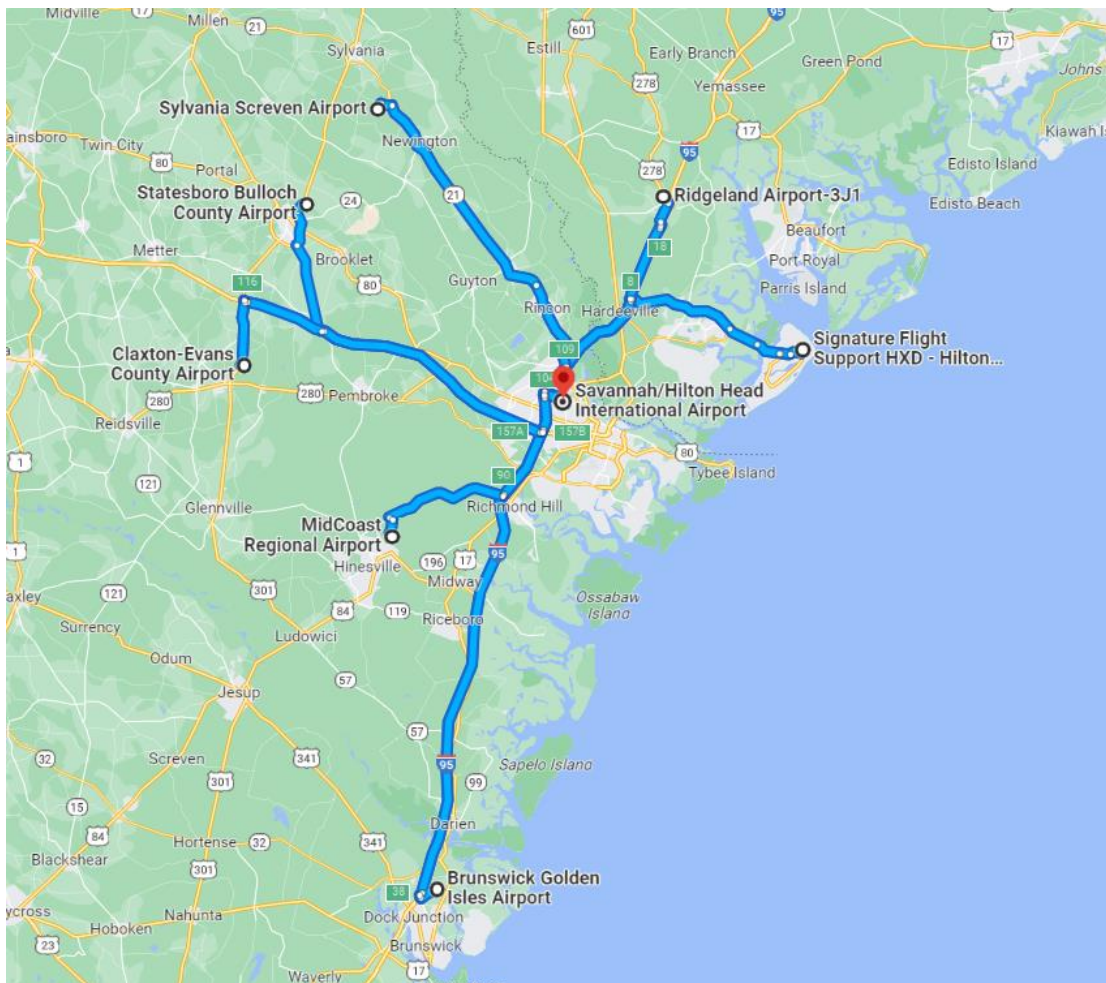


Figure 1: KSAV’s location relative to the next-nearest General Aviation airports (google maps)

Figure 1 shows a map of the 7 next-nearest paved public-use airports to downtown Savannah with the road routes required to travel to those locations from KSAV highlighted. As KSAV is situated to the west (inland) of the major population center of the area, the additional distance required to travel to any of the other nearest airport options for general aviation purposes

exceeds that required to travel to KSAV for many users. The additional driving distance to access these facilities significantly limit their value to general aviation users living and working in the Savannah area. As the primary benefits of aviation are time savings and convenience, an additional 60-140mi of driving round-trip to access that mode of transport is counterproductive and unattractive. Table 1 shows the distance in statute miles of the 8 next-nearest airports from KSAV.

Road distance from KSAV - Next Nearest Airports		
Airport	Identifier	Road distance from KSAV, miles
Downtown Savannah	-	9
Ridgeland-Claude Dean	3J1	34
Wright AAF/Midcoast Rgnl	KLHW	34
Hilton Head	KHXD	39
Claxton-Evans County	KCWV	47
Statesboro-Bulloch County	KTBR	49
Beaufort Exec	KARW	50
Plantation Airpark	KJYL	54
Brunswick Golden Isles	KBQK	71

Table 1: Additional road distance beyond KSAV for the next-nearest airports

Conversely, KSAV is only 9mi from downtown Savannah, and is most convenient for most Savannah residents. Working to provide a conducive environment for additional general aviation facilities at KSAV is essential to allow the general aviation market in Savannah to grow.

General Aviation Priorities – Transient vs Base Tenant

General Aviation users interact with KSAV via Fixed Base Operators (FBOs) and other hangar facilities to access the taxiways and runways in order to fly. As many people traveling in and out of the Savannah Area interact with KSAV via its airline terminal and associated infrastructure in order to fly, we can use this well-understood airline paradigm to examine that there are two distinct sets of travelers, each with their own infrastructure requirements: the inbound traveler and the outbound traveler.

As airline passengers, Savannah residents outbound on airline flights have different infrastructure requirements from inbound Savannah visitors. While the outbound Savannah residents might be interested in a parking garage spot at the airport to park their car after leaving home to catch an airline flight, the inbound visitor is interested in car rental or rideshare facilities in order to get to a hotel or rental home.

A similar difference in needs exists for General Aviation users of KSAV. Base-Tenant General Aviation users who reside in Savannah will keep their aircraft primarily in Savannah, and will access their aircraft to travel to destinations elsewhere. Transient General Aviation users, who are traveling inbound to Savannah from elsewhere, are interested in convenient facilities to park their aircraft temporarily, refuel and receive other services while in at KSAV in order to conveniently access their destination.

As airplanes cannot be stored long-term away from the airport as automobiles can, the entire general aviation market and system relies on each aircraft's ability to be based *somewhere* at a location convenient to the owner/operator. For most Savannah residents with airplanes, that location is KSAV.

Airport land is made available for development via a structure of leases between the airport sponsor (in KSAV's case, the Savannah Airport Commission) and primary leaseholders, which might include FBO's, businesses, and other major tenants of the airport. These primary lessees then have the opportunity to use those areas for their own purposes as allowed, including allowing transient aircraft to land and their crew/passengers access in/out of the airport, or to allow individual aircraft owners or pilots access to facilities via sub-leases.

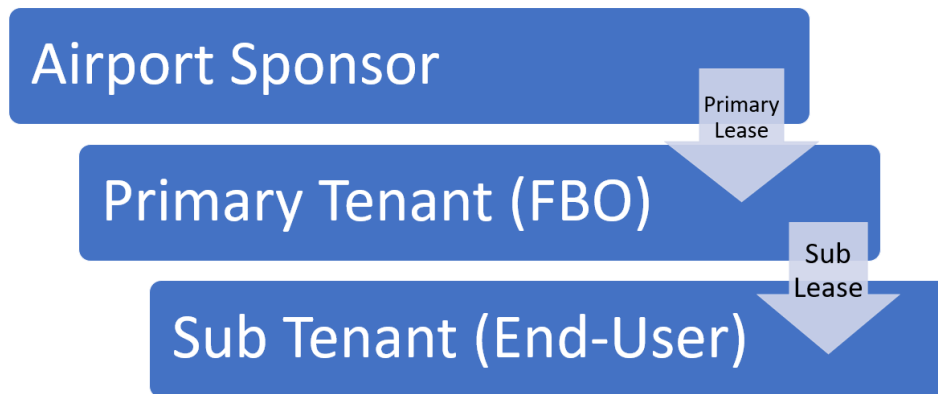


Figure 2: Basic lease structure available to most Base-Tenant end-users

Note that the nature of this lease structure means that for many individual General Aviation end-users, most commercially available aircraft storage is handled via sub-lease agreements with primary leaseholders, and as such, end-users are subject to those primary leaseholder's preferences or motivations. Additional capacity for primary leasehold facilities for local base tenants would aid in deconflicting priorities between transient customers and base tenants.

Southeast Quadrant Redevelopment Impacts

Redevelopment efforts on the Southeast Quadrant of the airport have created a reduction in aircraft storage capacity for General Aviation users. While these redevelopments will no doubt bring other benefits for KSAV and the Savannah area, an unfortunate externality of the reduction in capacity is an increase in prices for those general aviation base tenants that remain as a result of these changes.

Hangar space for light GA aircraft	Monthly Rent	% Increase
Signature T-Hangar, 2022 Baseline	\$ 477.00	-
Hangar 1007	\$ 700.00	147%
Sheltair Community Hangar	\$ 1,950.00	409%

Table 2: Hangar costs and increase over baseline: 2022-2023

Table 2 shows hangar cost increases at KSAV since the SE quadrant redevelopment project began. In the past year, several hangar facilities have been taken out of use for General Aviation storage, tightening the market on local hangar availability. Typical commercially available hangar rents for a light single/twin engine aircraft at KSAV prior to the start of SE quadrant redevelopment activities in 2022 were \$450.00-\$500.00 per month per airplane. Any new hangar leases available after the start of the SE quadrant redevelopment range from \$700.00/mo/airplane (hangar 1007) to upwards of \$2,000.00/mo/airplane (Sheltair quote at \$22/sf/yr, area calculated on wingspan x length). Signature Flight Support does not have any available hangar space. As a result of the recent loss of capacity, new hangar lease rates have increased by 40% to 300% at KSAV.

Fuel costs have also increased locally over the last 18-24mo relative to regional averages. The removal of the SAC managed self-serve Avgas pump, which was required to accommodate the relocation of Signature Flight Support's temporary FBO during the ongoing reconfiguration of the SE quadrant, means that the only Avgas fueling options on the field are full-service from either Signature or Sheltair FBO's. As of this writing, the retail cost of Avgas at KSAV remains at least \$1.30/gallon above the regional average. Jet A prices are also on average \$0.79/gallon above the Southern US average at KSAV. These fuels are only available during normal business hours of the FBO's, and sometimes at a significant delay due to service demand.

Fuel Costs per Gallon (Airnav)				
Fuel Type	Signature	Sheltair	Srn. US Avg	Avg Diff
Avgas	\$ 7.60	\$ 7.76	\$ 6.25	\$ 1.43
Jet A	\$ 6.65	\$ 7.22	\$ 6.15	\$ 0.79

Table 3: KSAV Fuel costs relative to Southern US average. Source: Airnav 2/28/23

As SAC and SAAA look toward future planning efforts, prioritizing self-serve Avgas and Jet A availability should be considered. Additionally, unleaded Avgas fuel options are reaching the early stages of commercial availability. A small-batch self-serve format may be advantageous to allow for a lead-free avgas option to be made available at KSAV ahead of the broader market.

Taken in sum, these recent increases in costs and reductions in capacity have driven some owners to relocate their airplanes to other airports, or to sell their aircraft entirely and exit the market. As KSAV is the only paved public-use airport in Chatham County, a relocation away from KSAV represents a loss in tax revenue for the City of Savannah and for Chatham County. A sale of an aircraft and an owner leaving the market entirely represents that same tax revenue loss PLUS the lost economic benefit that would have been generated for the local aviation industry in terms of maintenance, fuel sales, and other associated spending for that aircraft.

The loss in local storage capacity and fueling options has put acute downward pressure on the General Aviation market in Savannah. Further efforts between SAC and SAAA will be required to satisfy the latent local market demand and stabilize price increases to ensure the viability of the area's General Aviation market in years ahead.

Section 2: Survey Results

Survey Respondent Data

In December 2022, SAAA put out a survey of general aviation end-users asking about their experiences at KSAV as aircraft renters, student pilots, aircraft owners, etc.

Our survey had over 50 respondents. Of those, 35 reported their status as employees and described their role as mid-career or higher. 5 reported as VP level and above. 16 reported to own businesses. The 16 business owners reported a total of 207 employees in the Savannah area. 27 of the respondents owned a total of 28 airplanes in whole or in partnerships.

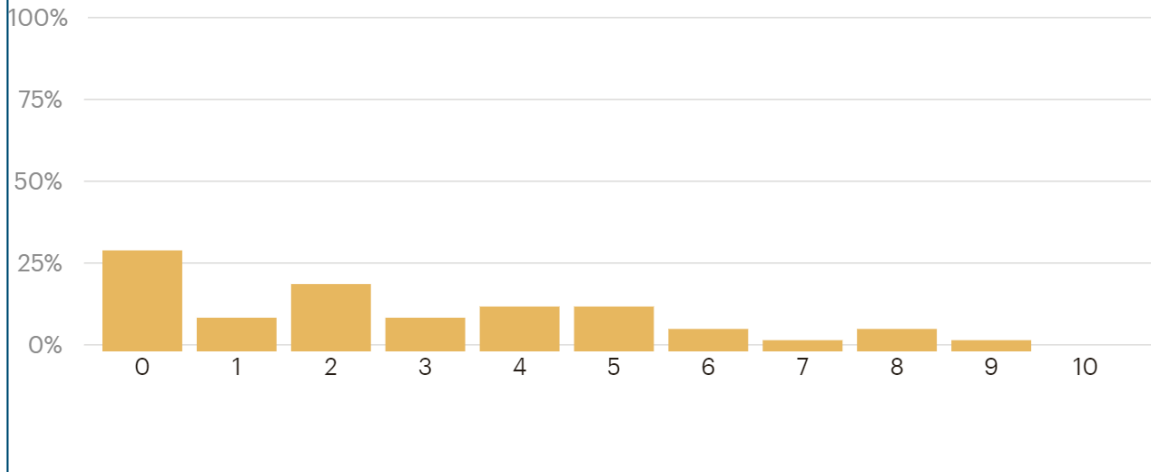
Note that not all respondents answered all questions, so the number of responses per question varies somewhat.

Survey Question Results

Questions 1-8 asked respondents to give demographic information for the purposes of characterizing the response group as detailed above.

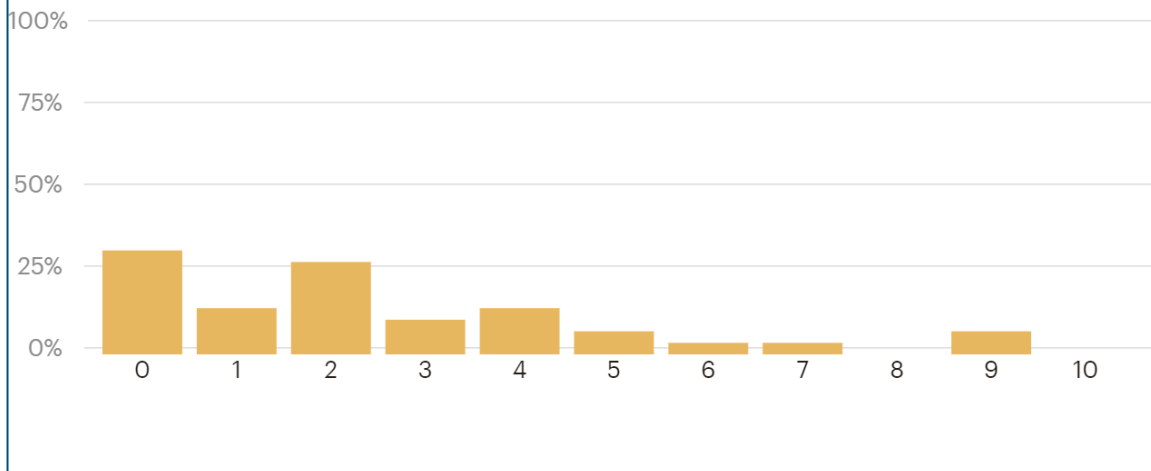
Question 9 has 35 answers (Range) Avg rating: 3.0

“If you own an aircraft, how satisfied are you with the cost and availability of fuel at KSAV? Skip if this doesn’t apply.”



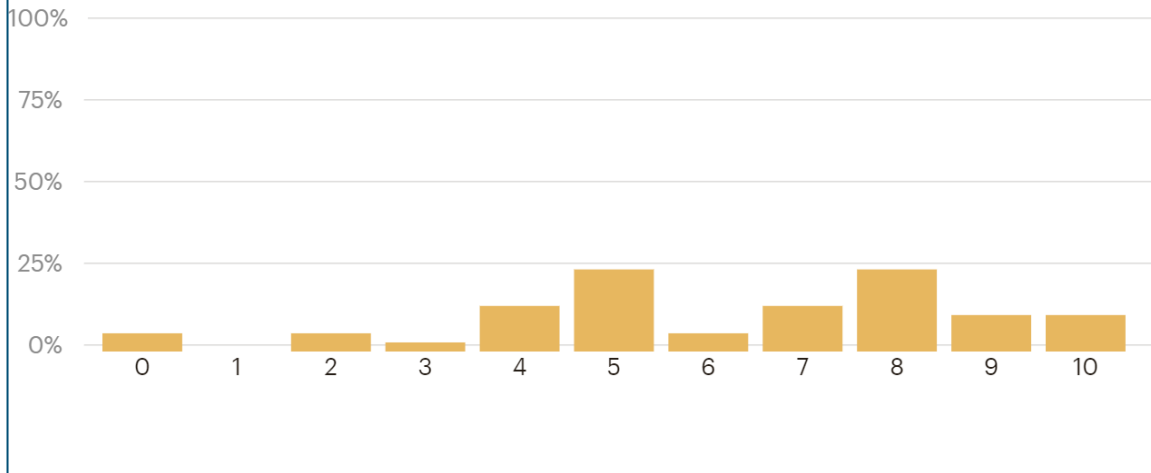
Question 10 has 34 answers (Range) Avg rating: 2.5

“If you own an aircraft, how satisfied are you with the options available for aircraft storage at KSAV? ”



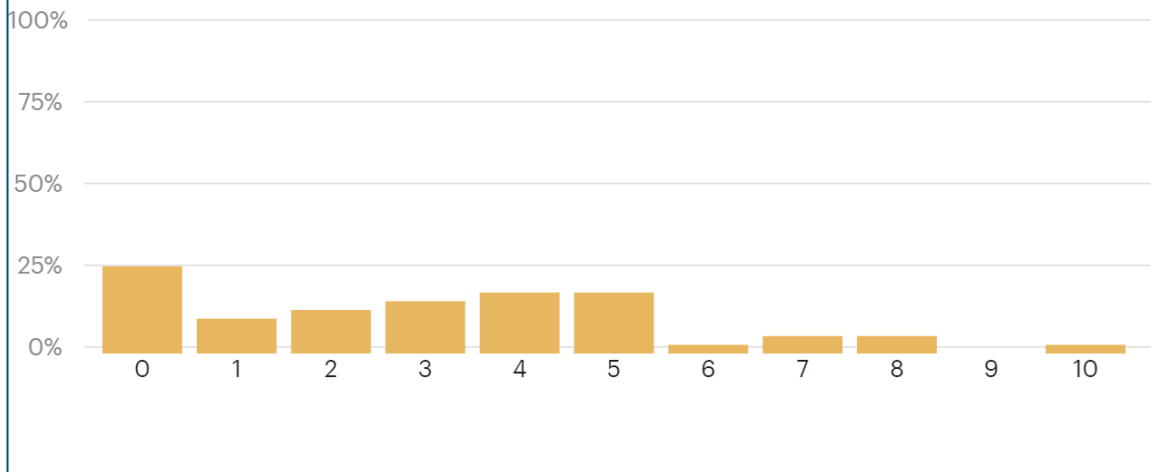
Question 11 has 43 answers (Range) Avg rating: 6.2

“If you own or fly an airplane at KSAV, how would you describe the ease of ownership, access, and facilities at the airport as it compares to other class C airports?”



Question 12 has 45 answers (Range) Avg rating: 3.1

“If you own or fly an airplane at KSAV, what level of effort do you feel is being made to attract, develop, and retain long-term general aviation facilities and activity here?”



Question 13 has 48 answers (Radio Buttons)

“Which group of Savannah airport users do you feel has more ease of use at the airport?”

People who visit Savannah and stay for a short time



People who live here and base an airplane here



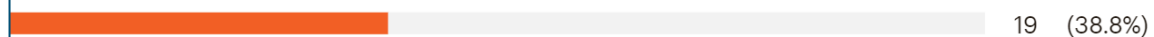
Question 14 has 49 answers (Radio Buttons)

“How do you fly? Select all that apply.”

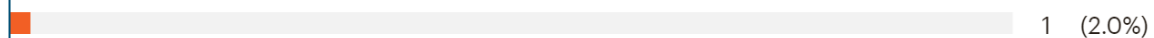
I own an airplane



I rent an airplane

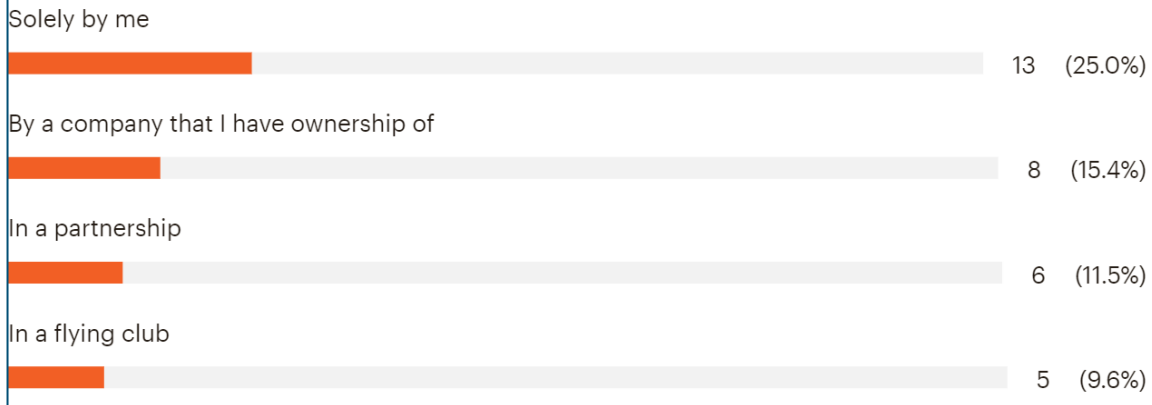


I do not fly (we won't hold it against you)



Question 15 has 29 answers (Checkboxes)

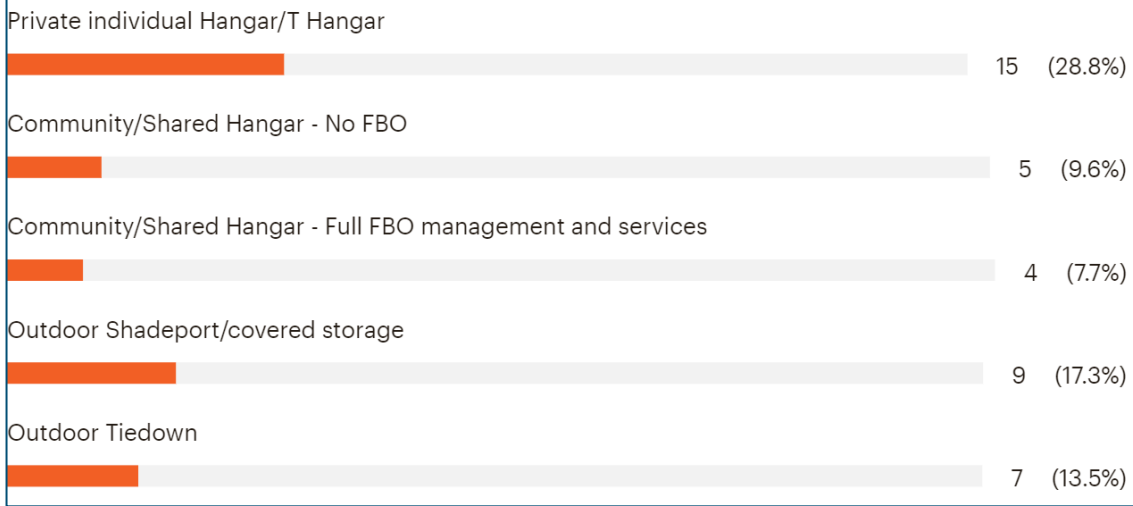
“If you own an airplane, how is it owned? Select all that apply.”



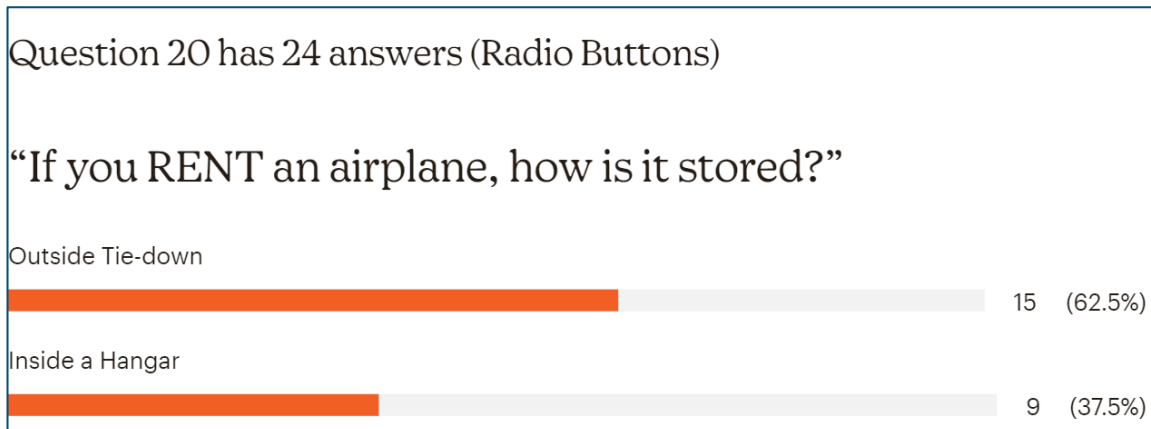
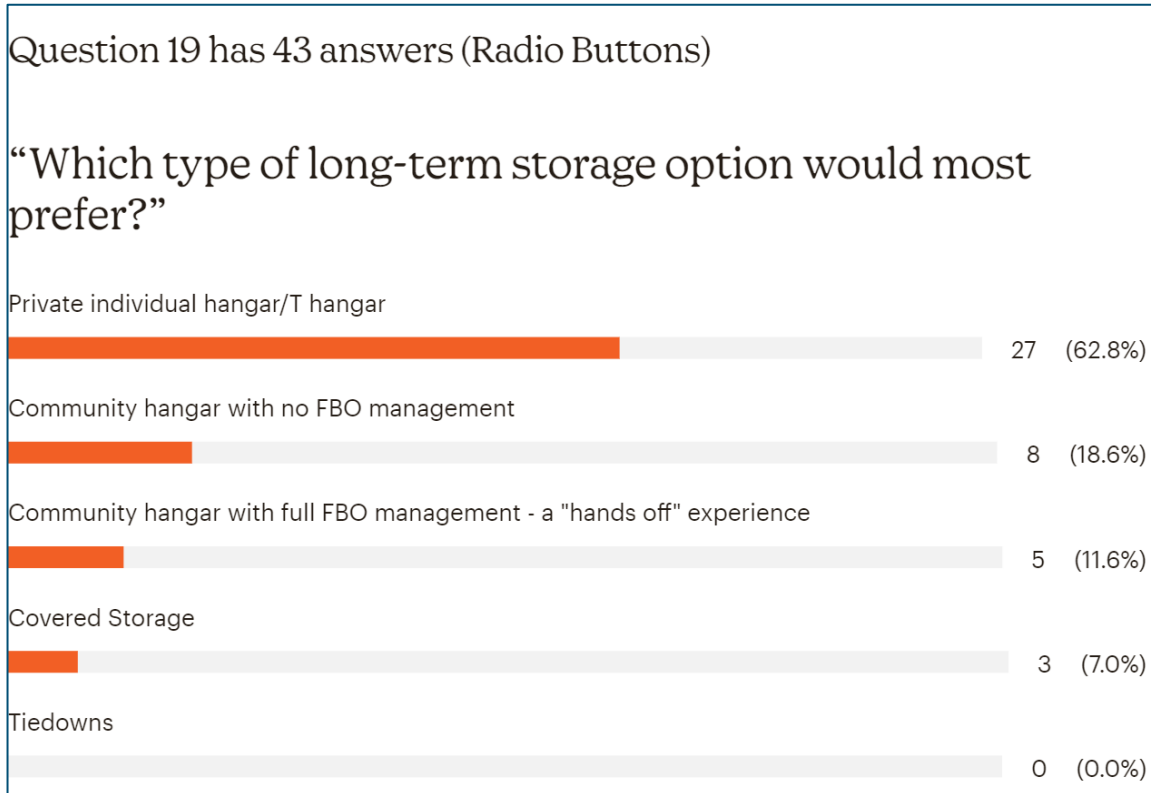
Question 16 asked users to respond with the make and model of any aircraft that they owned. Results are kept private for confidentiality of the respondents.

Question 17 has 38 answers (Checkboxes)

“What type of storage arrangement is your airplane currently kept in?”



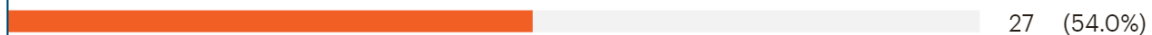
Question 18 asked where, specifically, on the field these aircraft were kept. Results are kept private for confidentiality of the respondents.



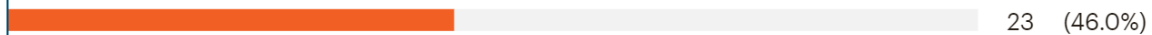
Question 21 has 50 answers (Radio Buttons)

“Have the options available to you at the Savannah airport negatively influenced your decision to pursue further flight training, purchase an aircraft, or move up to a larger or more capable aircraft?”

Yes, it's limiting my options



No, no effect



Survey Written Responses

Question 22 asked respondents to comment with any additional thoughts that they had on these matters. For reasons of respondent confidentiality, any specific information relating to people, companies, aircraft, or locations on the airport are replaced with [] brackets.

"With the lack of facilities to store an aircraft at KSAV it is difficult to purchase a new aircraft as the options of where to store it are extremely limited. As it's making us think about even moving home to be closer to another airport that has open facilities "

"I wish there would be more affordable options for aircraft owners on the airport. This pertains to hangars, covered storage and fuel. I feel SAC focuses too much on commercial options for GA and almost ignores the needs of cost conscious pilots. There needs to be a better balance between commercial services and less costly options."

"The airport needs more t hangars for GA. Small business depends on it. "

"I have no problem with [other primary tenants] expanding, they are good for Savannah. I would like to see more options as far as self-service fuel, more hangars and shade ports. I would love to have an individual hangar but they are so very expensive. Wish there were more options without having to move a plane out of town to find an affordable hangar and fuel prices."

"There's decent support for transient aircraft with two FBOs, but SAV is not a great experience for based pilots. Very limited hangar space and fuel options. Would prefer not having to work with [FBO's] at all on parking / fuel. "

"The cost to rent at Savannah is significantly higher than in many other areas. Attracting a broad range of business to rent/instruct is important to minimize these costs. By reducing facility costs (aircraft storage, fuel, maintenance, etc) the costs to students and renters could also be minimized. "

"Fuel costs are VERY high and now no self-serve options are available. Storage costs are VERY high and limited at Savannah. Only one mechanic shop available [on the airport]. "

"I certainly appreciate the experience at the Savannah Airport but now, with the growth of the general aviation community, the limitations at the airport have started stifling the growth of our small venture. We only wish to see more owners and pilots. "

"I sold my PA-28 and although current as CFII. will hang up the headset very soon after 63 years in aviation. I want to recognize the airport administration and all entities on the field for superb support, cooperation, and coordination that make a very successful airport that satisfies user needs. Air traffic services are responsive and never denied a reasonable request even when it added to the controller's workload. Thanks also to you SAAA for taking this lead in supporting GA interests at KSAV "

"I live in Pooler and work [near the airport]. KSAV is very attractive for basing my airplane if there were more private t-hangars and the monthly rent was considerably less than what I understand it is right now. Fuel is also about \$1 per gallon higher than KJYL. General Aviation is a very important part of the aviation community and, while I certainly understand and love the level of activity at KSAV with commercial, business, and military aircraft, GA is where a lot of pilots and mechanics start. Building up and keeping a General Aviation community is vital to the growth of an airport like KSAV, especially with no other federally funded public airports within a 60-mile range. "

"Bring back self service fuel. GA pilots should not be forced to pay extra for fuel from [an FBO's] truck."

"The present situation works for my situation, but my aircraft's part-time status is unusual."

"Thanks SAAA for giving GA community a larger, collected voice for planning at KSAV! I am currently renting, but would love to join local flying clubs which I understand are not able to accept additional members due to needing more aircraft but no storage for those aircraft. Hoping KSAV will find a larger home/plan for us. KSAV touts being the #1 airport in the US (from an airline passenger perspective) but we have a long way to go to make it the #1 airport in the US for aviators of all products. "

"Conventional taxiway designs among hangars allow for the taxiway to be blocked when pulling out or pushing in, or with owners who expect the FBO to discover the airplane and handle it. Sometimes [the FBO] is slow or forgets."

"I've sold my airplane but still fly weekly out of SAV as a contract pilot. The cost of operating out of SAV is not welcoming to the GA community. Fuel cost and hangar/storage locations are some of the most expensive in the South East. Just my \$.02. "

"Hopeful that we can bring the ownership and access level for local pilots up to a higher standard than has been present for the past decade or so."

"It's a real shame that Savannah doesn't have more accommodations for GA aircraft. A beautiful, large property and modern terminal, yet not GA friendly at all, forcing smaller planes to go elsewhere. And when they do, it's primarily out of state. "

"The current outlook for general aviation facilities at KSAV has me considering what options, if any, are available to me to store any future airplane at a smaller airport away from town (TBR, etc). I would really like to purchase my own airplane soon and it would be fantastic if I had the opportunity to keep it where I live. I also believe that KSAV has created a supply-and-demand fuel issue in the favor of FBOs by removing the self-fueling Depot well before anything has begun to be demolished in that part of the airport. I would love to see facilities such as self-serve fuel back on the field as an additional step towards boosting the general aviation presence."

"I had a great experience flying a rental aircraft from my home base HXD to SAV. I took my IFR written at [the testing center] and was back en route home to HXD shortly after. 42mins total travel time sure beat 2+ hours driving! It was a seamless experience!"

"Thanks for opening GA 4!! Glad to have it back!"

"AvGas price \$2.00/g more than surrounding airports is obscene. There should be some consideration to building more private hangars before [Other primary lessees] build out the remaining real estate."

"Lack of self service fuel is currently my only complaint. Otherwise I'm very happy with the service at KSAV. ATC especially are doing a wonderful job keeping us safe up there. Thanks for everything!"

"I plan on buying an airplane within the next 12 months and will need access to private hangar. "

"I did my training at [KSAV]. I also am continuing my training there. Just wish I could still buy gas there but I do understand the price got too much to maintain. "

"Our company had our own fuel tank, which was right next to the avgas self-serve tank. Both of which were removed well ahead of the need for removal. The communication for removal was dismal at best. We knew the tanks would be removed, but nothing was communicated about when, and definitely not in regards to the construction timeline. One day we had a tank, and the next a crane was there to take it out. The fuel reel/pump box was removed without notification and we didn't have time to clear out our items that were in the box. As hangars on the [FBO areas] are removed for construction, tenants will likely need to move to [other FBO's whose] hangar rates are exorbitant. In speaking with the GM, their rates are determined above the local level. "

Section 3: Recommendations

Based on the data and responses contained above, SAAA makes 3 recommendations to both Savannah Airport Commission.

To the Savannah Airport Commission (SAC):

1. Allow SAAA to brief SAC on this matter at an upcoming SAC business meeting (ideally April) in order to help the commission understand the difference in needs between transient GA users and base tenant GA users.
2. Review the General Aviation portion of the results presented to you in the study received from an outside consultant in fall 2022, and enlist the help of SAAA to help characterize those data as they relate specifically to KSAV.
3. Assist the base-tenant GA community by identifying taxiway-accessible areas of the airport suitable for hangar development, and other ways to grow opportunities.

Additional References

[AOPA Aircraft Hangar Development Guide](#)

[Pond Company Study Evaluating the state of Georgia's Hangar Needs](#)