

Outlook for Air Travel

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AIR SERVICE



THE LANDSCAPE

Consolidation in the airline industry

Prospects for Industry Growth

Air Service: A Community Issue

CURRENT INDUSTRY OVERVIEW

Local Air Service

Passenger Growth

Seat Growth

Bucking the trend

It's a community thing

Where do we go from here?

NON-STOP FLIGHTS DEPARTING FROM CHARLESTON

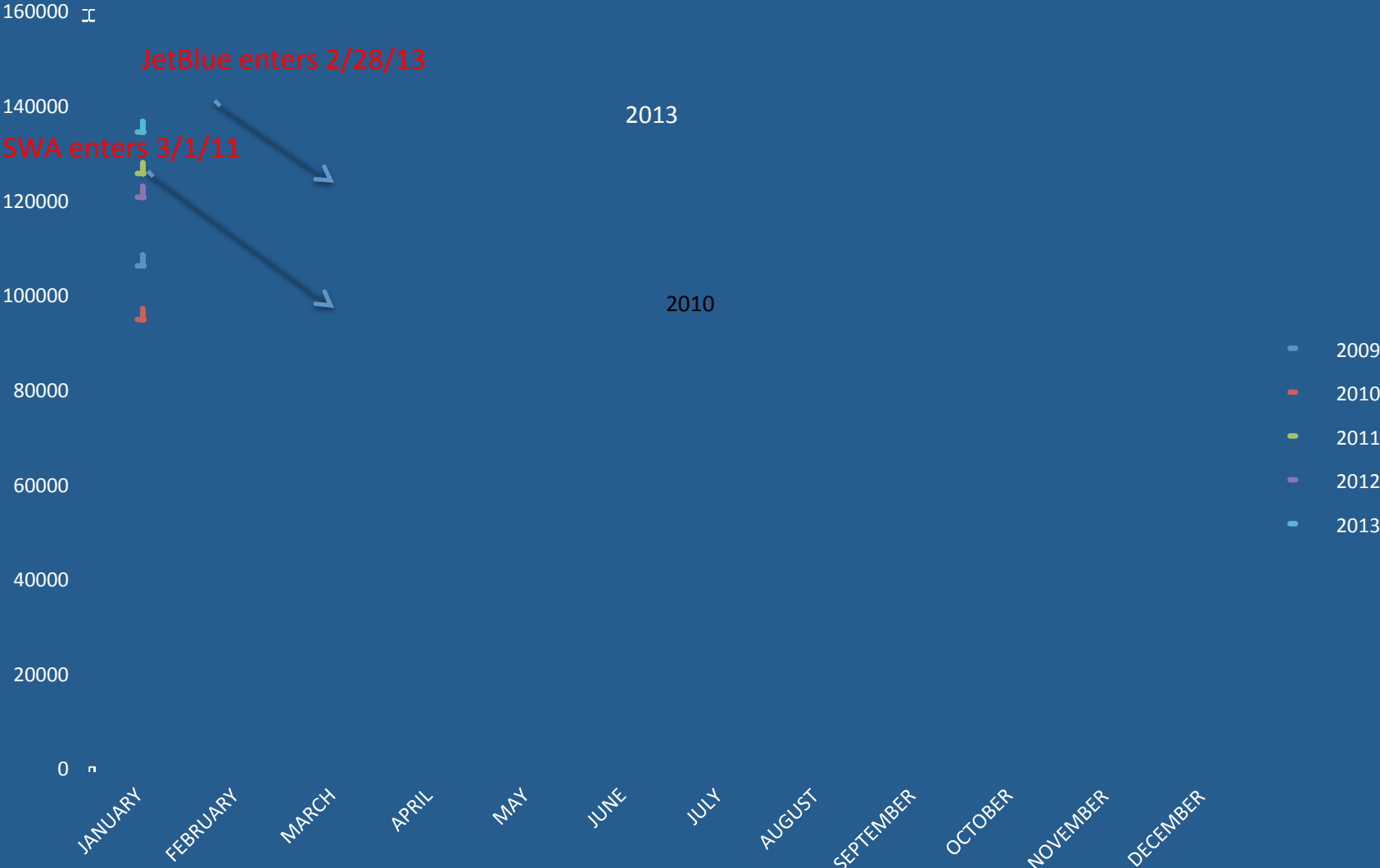
NON-STOP FLIGHTS DEPARTING FROM CHARLESTON

The Charleston area features non-stop
air service to the following cities:

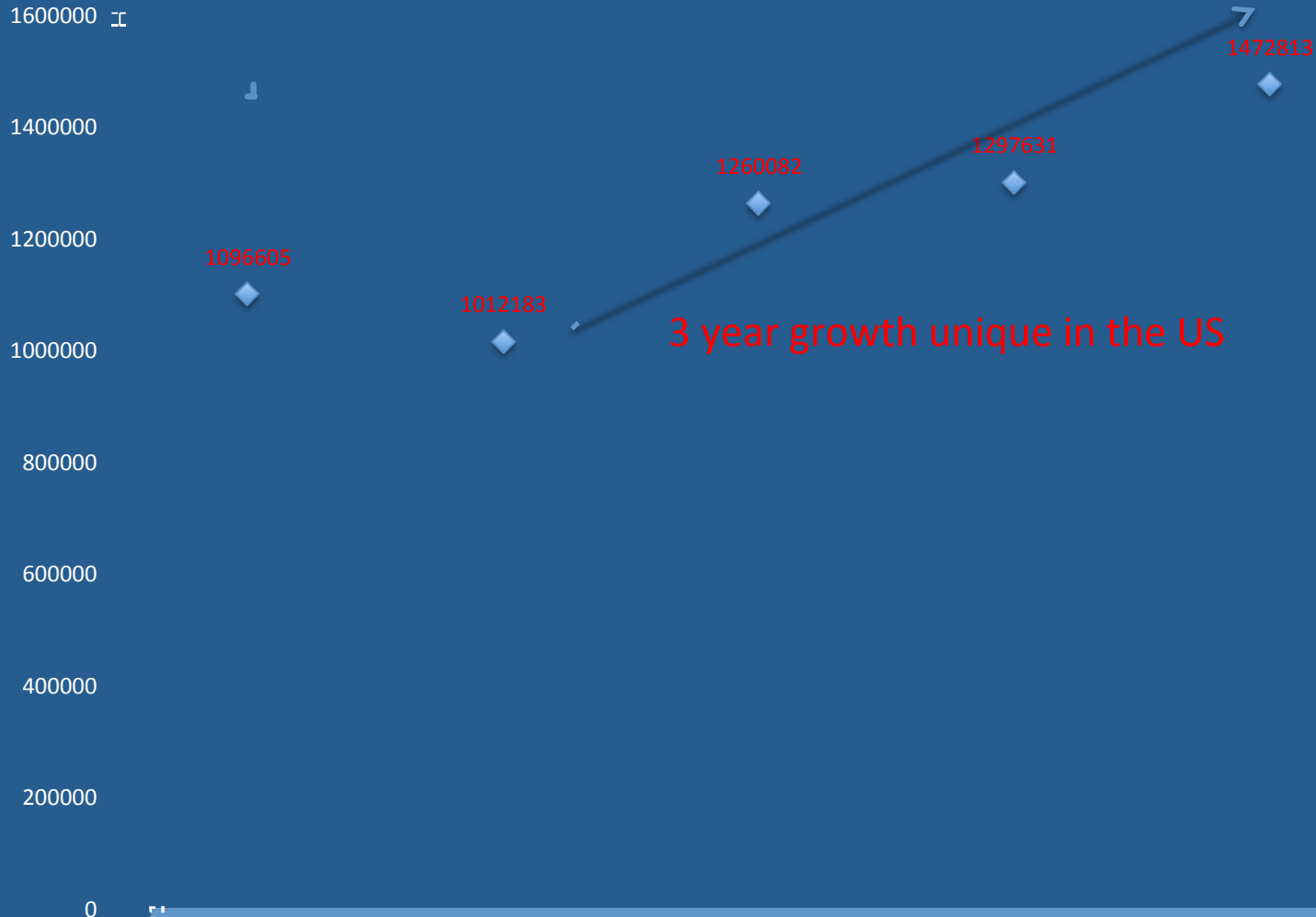
Atlanta, GA | Baltimore, MD | Boston, MA
Charlotte, NC | Chicago, IL
Dallas/Ft. Worth, TX | Detroit, MI
Houston, TX | Miami, FL
Nashville, TN | New York, NY
Newark, NJ | Philadelphia, PA
Washington, D.C.



CHS Growth by Month and Year



CHS Enplanements by Year



2009	2010	2011	2012	2013
1,096,605	1,012,183	1,260,082	1,296,827	1,472,813p

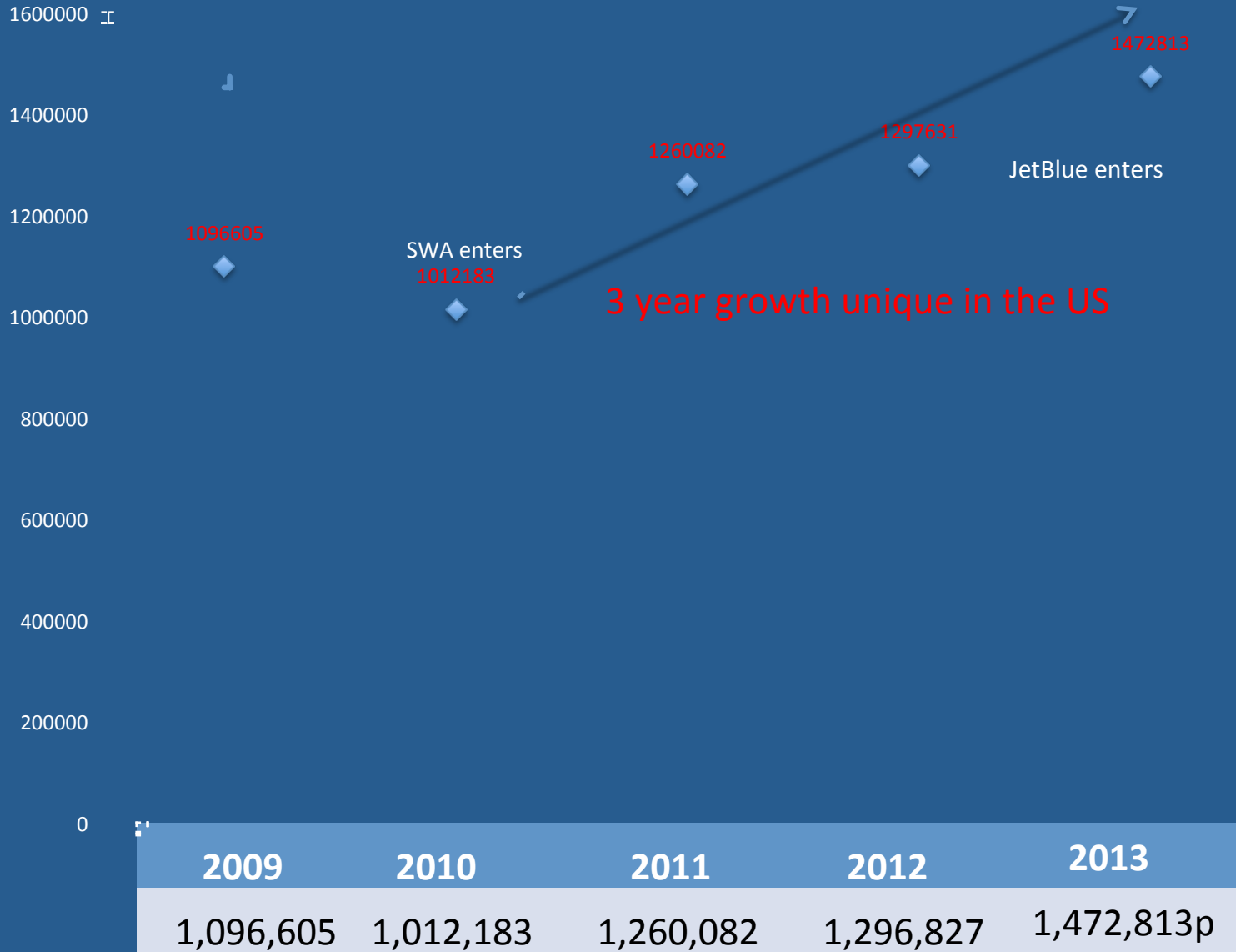
But Net Domestic Capacity Has Been Flat

U.S. Lower 48 Capacity Trends
Billions of Seats per Year



Source: DiiO Mi

But not in Charleston



Daily Seat Total for June 2014

5,770

How does that compare to recent years?

MARCH 2012

4,455

JUNE 2011

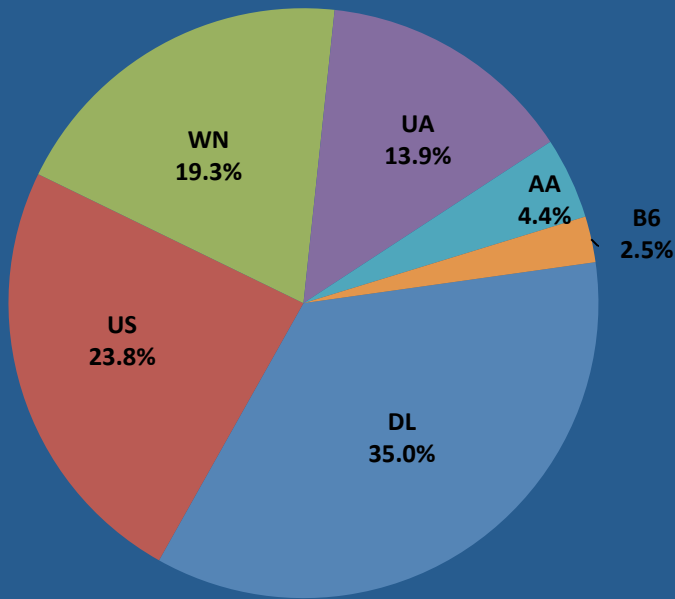
5,056

JUNE 2010

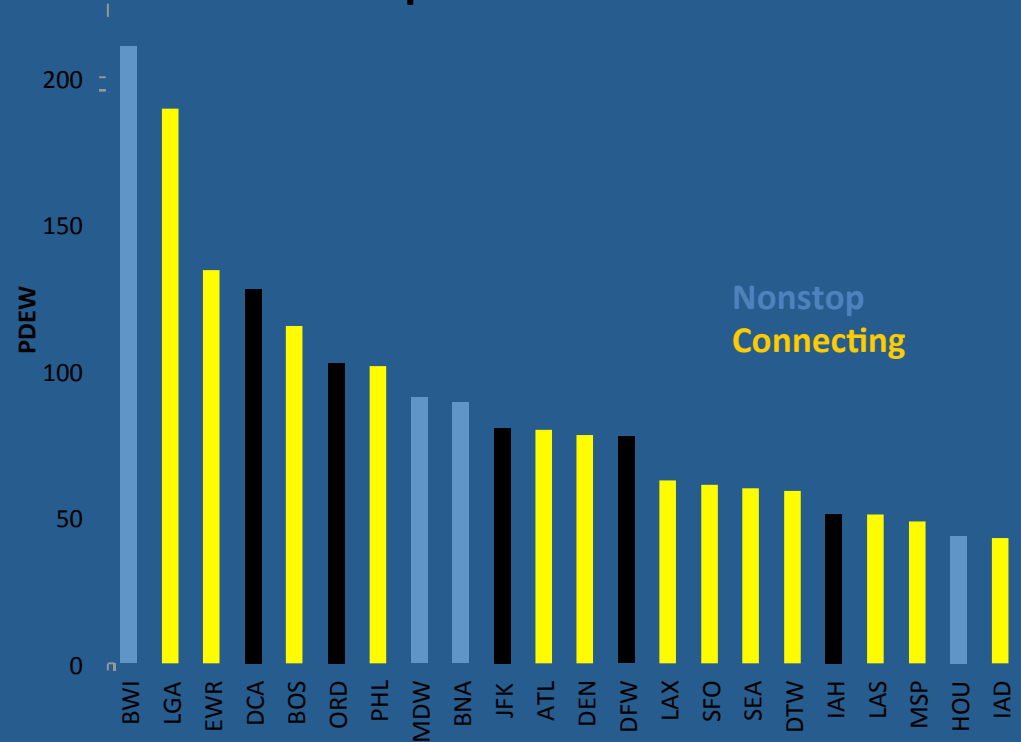
3,958

CHS Market Share

CHS Market Share (YE2Q13)



Top CHS Markets



- SWA owns 19% of the CHS market, while serving 17 of the top CHS markets, 4 of which on are on a nonstop basis

The DMO Role

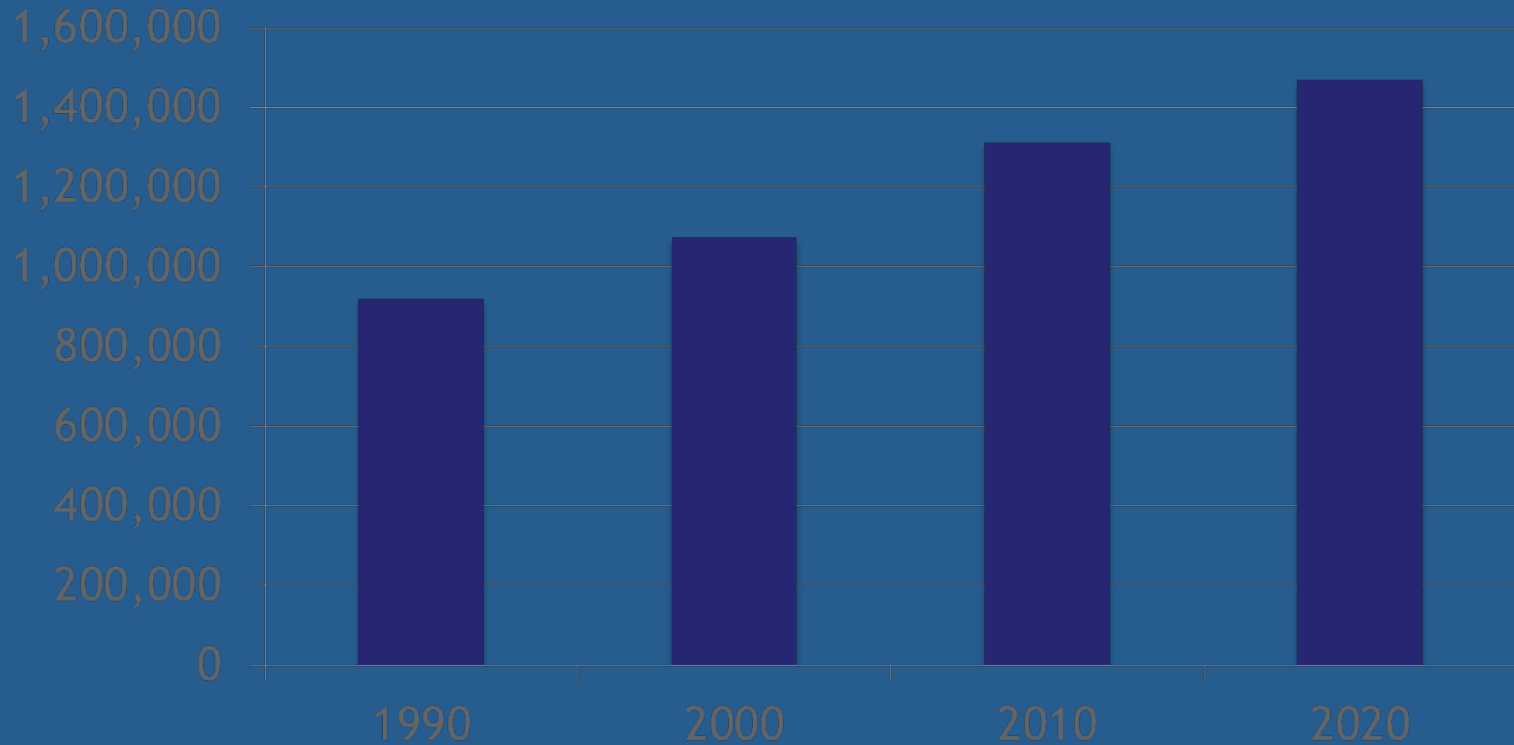
It's more than an airport thing

We Tell The Story

We go beyond their numbers

And tell the airline what their
numbers don't convey

Population Projections: SC Coast

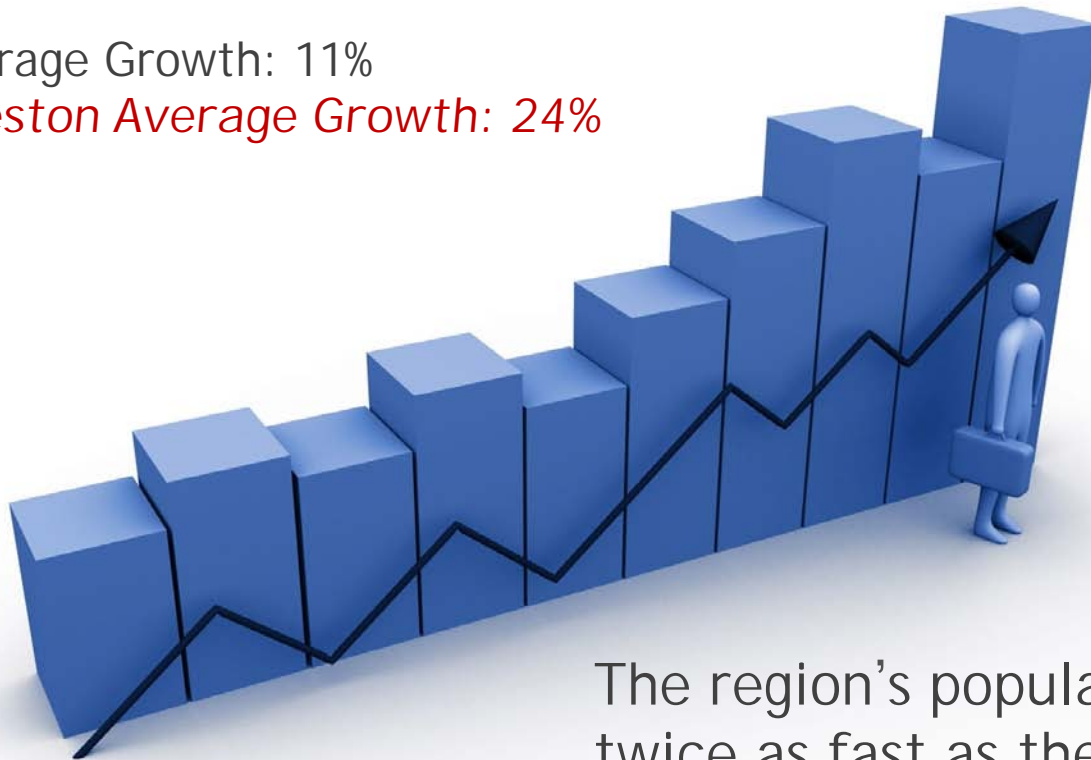


Source: US Census, SC Budget and Control Board

Double-Digit Population Growth

US Average Growth: 11%

Charleston Average Growth: 24%



The region's population grew twice as fast as the U.S. from 2000 to 2011

Significant Developments

- Boeing's 2nd 787 Dreamliner assembly line
- Boeing 787-10 exclusively CHS
- Wind Turbine Drive Train Testing Facility
- Fast growing Knowledge Based Industry



Strong Economic Outlook

- Fast-growing population
- Diverse, sustainable global economy
- Year-round presence of international & leisure travelers
- Brand Charleston is recognizable
- *Livability index creates talent recruitment positives*

Key Economic Drivers

- Port of Charleston
- Medical
- Military
- Higher Learning
- Information Technology
- Aerospace Cluster
- Visitor Industry



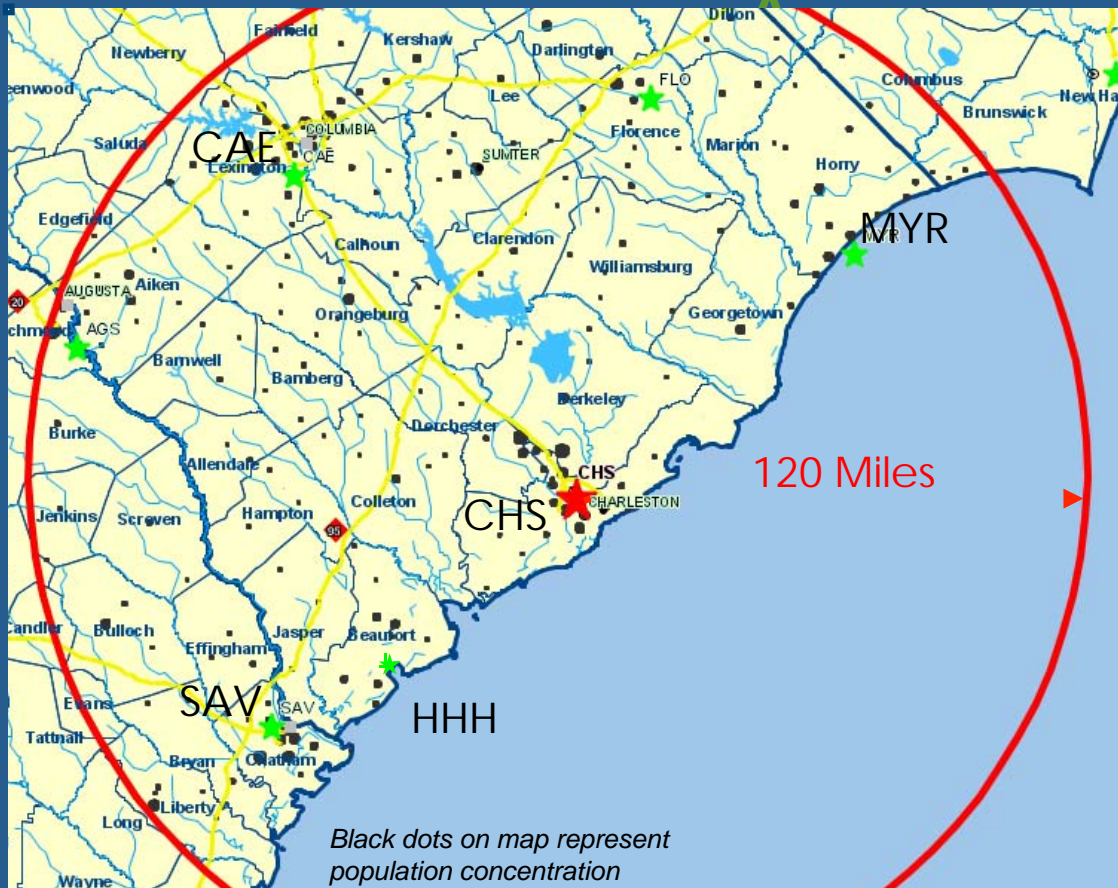


Aerospace Cluster

- 8000 employees
- \$6.0 billion annual economic impact
- 1 of 3 places in the world building wide-body commercial aircraft Airport Complex

We talk about
our neighbors

Further Defining the Catchment



Population:
app 2,000,000

Tourism:
23,000,000

Areas are connected
with 4 lane highways

Less than 2 hour drive
to CHS

We define our
industry's value

Partnership is a
contact sport

We share the airline message

Everything you've heard is true.

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We mention by name

Three in a row



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And sometimes we are not discreet

#CharlestonRestaurantWeek
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JANUARY
8^{thru} 19

SouthwestToCharleston.com

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FIND A HOTEL

Sweet dreams are made of historic inns, beachside resorts and every type of accommodation in between. All perfectly situated to help you explore the wonderful sights and attraction on your must see list.



PLAN YOUR ITINERARY

Famous golf courses, top-rated tennis courts, pristine beaches, monumental battleships and beautifully preserved architecture barely scratches the surface of attractions in Charleston. You can be as adventurous or as tame as you like.



BOOK A TICKET

Plorum ipsum del nores sordu and annato del formossa plorum ipsum mores sor and then some. Del gatto mores ipsum sordu annato more filpimor dep gatto dore sldkfd wlreower asdlker.

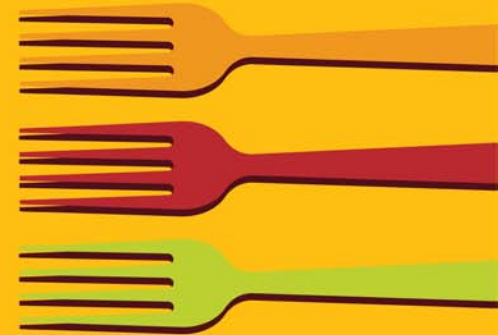
DIRECT FLIGHT TO DELICIOUS

on SOUTHWEST AIRLINES

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WEEK

JANUARY 8th - 19

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Where do we go from here?

Challenges & Opportunities

