The Outlook for General Aviation

Jeff Hamiel, Executive Director
Metropolitan Airports Commission
Importance of G.A.

• Contributes more than $150 billion to U.S. economy
• Employs 1.3 million people
• Carries 166 million passengers annually
• Two-thirds of flying done for business purposes
• Connects communities, businesses & clients
• Training ground for commercial pilots
Service to Communities

- Air ambulance and organ transportation
- Aerial firefighting
- Crop dusting
- Law enforcement
- Traffic reporting
- Disaster response
- Recreation
Impacts of Economic Downturn

• After five straight growth years, aircraft shipments down in ’08 & ’09
  – U.S.-made plane shipments declined 48.5% in 2009
  – Piston engine aircraft declined most: 55.1%
  – Business jets declined 46.2%
  – Turboprops down 19.2%

• Fractional ownership down worldwide for first time

• Student pilot numbers down 10.8%
Fewer Pilots, Fewer Planes

- In 1978, 17,811 new G.A. aircraft were shipped. In 2009, only 1,587
- In 2009, U.S. share of business jet deliveries below 50% for first time
- Pilot population has declined 28% since 1980
- Private jet travel became symbol of corporate excess when automakers visited Congress seeking aid
Some Signs of Recovery

• Corporate profits beginning to recover and economy to grow, albeit slowly
• Fewer used aircraft for sale
• Use of existing fleets stabilizing
• Inquiries for new orders growing
• Financing still very tough but beginning to improve
VLJs Held Great Promise...

- Very Light jets once heralded as affordable answer for entry level and air-taxi use
  - Single pilot operation
  - Seat 4-8 people
  - Maximum take-off weight under 10,000 lbs.
  - Lower operating costs than conventional G.A. aircraft
  - Promise of widespread use for point-to-point air-taxi services
...But Failed To Deliver

- Thousands ordered before economic collapse
- Plans derailed by the economy:
  - Eclipse Aviation filed Chapter 11 in ’08 and liquidated in ’09
  - Adam Aircraft folded in ’08
  - Day Jet air taxi ceased in ’08
- Locally, lost JetChoice air charter service at St. Paul Downtown Airport
LSAs: New Growth Potential

- Light-sport aircraft specific to U.S.
- Maximum gross-takeoff weight of 1,320 lbs. (1,430 lbs. for water operations)
- Maximum speed: 120 knots
- 1 or 2 seats
- Single electric motor or reciprocating engine
- Less restrictive maintenance requirements
Great Entry-level Option

- Requires only a Sport Pilot Certificate to operate
- Includes:
  - Powered aircraft and gliders
  - Gyroplanes
  - Powered parachutes
  - Weight-shift control aircraft (trikes)
  - Lighter-than-air craft (balloons and airships)
- Ideal for short trips
Strong Safety Record

- 2009: Fewest accidents in U.S. aviation since WWII
- Fatal accidents declined more than 56% over past three decades due to:
  - Changes in aircraft design and manufacturing
  - Pilot training
  - Regulation
- 1,459 G.A. accidents in 2009, 273 involving fatalities

![Accidents Per 100,000 Miles Flown](chart)

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Security An Ongoing Issue

- New protocols established after 9/11
- Customs requires passenger manifests for all G.A. entering U.S.
- Airport watch programs and individual awareness & responsibility are key
- Must continue to assess risks and act appropriately
- Learning curve for Federal Travel Restrictions (FTRs)
Environmental Progress

- Turbine business aircraft improved fuel efficiency 40% in 40 years
- New LSAs nearly twice as fuel efficient as piston airplanes
- Goal: reduce carbon emissions 50% by 2050
- Leaded avgas will be phased out in coming years, a challenge for piston plane owners and manufacturers
More Pilots Needed

- Rule of 60 eliminated in 2007, allowing commercial pilots to work till 65
- Delayed ability of other pilots to move up and stymied opportunities for new commercial pilots
- As those pilots reach age 65, demand will grow
- With fewer pilots-in-training, could mean shortage in coming years
MAC Reliever System

- MAC owns and operates six reliever airports in 35-mile radius of downtown Minneapolis and St. Paul
- Primary relievers:
  - Anoka County-Blaine
  - Flying Cloud
  - St. Paul Downtown
- Secondary relievers:
  - Airlake
  - Crystal
  - Lake Elmo
Steady Decline in Ops & Aircraft

- Operations have declined from 827,386 in 1999 to 389,843 in 2009
- Aircraft based at MAC reliever airports declined from 1,864 in 1999 to 1,520 in 2009
- Less flight training and the economic downturn are changing use and demand
Airport Improvements

- Recent improvements driven by nature of flight activities and need to protect infrastructure
- Efforts to right-size airports
- Many modern business aircraft need 5,000’ runway to operate efficiently
- Until recently, only St. Paul Downtown had a runway measuring 5,000’ or more
St. Paul Downtown Airport

- Only intermediate airport in MAC system, with longest runway measuring 6,491’
- Recent improvements:
  - Floodwall and sub-drain system to protect against Mississippi River flooding
  - EMAS system at either end of Runway 14-32
- Joint airport zoning process underway
- Reviewing non-aeronautical revenue opportunities
Flying Cloud Airport

- Recent improvements
  - Extended Runway 10L-28R to 3,900 feet in 2008
  - In 2009, extended Runway 10R-28L to 5,000’ x 100’
  - Created new area for hangar development on south side
  - Upgraded and relocated navigational aids
- Joint zoning underway
- Identifying potential non-aeronautical development
Anoka County-Blaine Airport

- Expanded through unique partnership with county
  - Extended Runway 9-27 to 5,000’ x 100’
  - Installed ILS
  - Extended/added taxiways and connectors
  - Developed medium-intensity approach lighting system
  - Created new hangar area on northwest corner anchored by new FBO

- Seeking non-aeronautical development
Crystal Airport

- Recently completed LTCP envisions closing two of airport’s four runways:
  - Would remove turf runway and one paved runway, leaving the original paved and a crosswind runway
  - Reduction would reduce maintenance costs without impacting airfield needs
  - Evaluating process for implementing closures
Airlake Airport

- LTCP calls for:
  - Construction of a south hangar area
  - Extending the only runway to 5,000’ when demand due to nearby industrial/commercial development warrants it
  - Requires relocation of Cedar Avenue
Lake Elmo Airport

- LTCP recommends:
  - Construction of a new hangar area in the near future
  - Reconstructing and extending crosswind runway to 3,200’
  - Installation of an automated weather observation system
  - Relocation and extension of the primary runway in the distant future
Looking Ahead

- Operations at MAC airports might never return to late 1960s peaks, fueled by pilot training through the G.I. Bill
- As the area population grows, demand for G.A. services throughout the metro will remain strong
- Recent infrastructure investments ensure we are ready to accommodate demand
For More Information

www.metroairports.org/relievers
www.youtube.com/user/MetAirCommission