Aviation Gives Us a Lift!
Iowa Department of Transportation
Office of Aviation
Michelle McEnany, Director
Presented to CTRE
April 28, 2006
Aviation is Important to Iowa

- 111 Public Use Airports
- 6,800 Active Pilots
- 3,800 Registered Aircraft
- 1.4M Annual Aircraft Operations  
  - (88% General Aviation)
- 3M Air Service Passengers
- 250M Pounds of Cargo
- $834M Economic Impact
- 10,000 Jobs
Office of Aviation

- Promote air transportation
- Airport development
- Aviation safety
- Partnerships
Iowa Aviation System Goals

- Development that meets current and future needs
- Economic support that sustains and enhances Iowa’s economy
- Safety & security
- Accessibility from the ground and the air
- Education, career opportunities, and outreach to promote benefits of Iowa’s air transportation system
More than 250 million pounds of air cargo is handled annually in Iowa due to its central location in the United States. Air cargo provides an economic boost to the state.
Aviation plays an important role in medical emergencies and providing health care to rural areas.

4000 operations annually!
Businesses use aviation to enhance employee productivity and efficiency.
Aircraft have a wide range of uses including photography, surveying, news reporting, and search and rescue.

This Hughes helicopter/tree trimmer was used in the summer of 2004 to trim branches away from power lines. Photo submitted by Leigh Ann Gibbs.
There are more than 50 Iowa-based aerial applicators licensed to apply crop protection products in Iowa.
The sky over Iowa is not the limit. Aviation creates career opportunities for Iowans.
General aviation aircraft make up 96 percent of the U.S. civilian aircraft fleet and 75 percent of all U.S. flights.
Balloon and skydiving are popular recreational activities in Iowa.
Fly-ins and air shows are popular aviation activities.
Homebuilt aircraft are the largest source of newly registered single-engine aircraft.
Development and sales of aircraft supplies and technology provide an economic boost to the Iowa economy.

Companies like Alcoa’s Davenport Works and Iowa-based Rockwell Collins are major suppliers to aircraft manufacturers and the military. Photo submitted by John Halbrook.
Iowa’s eight commercial service airports handle more than 3 million passengers per year, providing a significant economic impact that fuels our state through employment, spending, and supporting businesses.
Passenger Air Service

- Quality of life
- Connectivity to the world
- Economic development
# Passengers Through Iowa Commercial Airports 2004

<table>
<thead>
<tr>
<th>Airport</th>
<th>Passengers</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Des Moines</td>
<td>1,990,000</td>
<td>62</td>
</tr>
<tr>
<td>Cedar Rapids</td>
<td>940,000</td>
<td>29</td>
</tr>
<tr>
<td>Sioux City</td>
<td>82,000</td>
<td>2.5</td>
</tr>
<tr>
<td>Waterloo</td>
<td>82,000</td>
<td>2.5</td>
</tr>
<tr>
<td>Dubuque</td>
<td>76,000</td>
<td>2.4</td>
</tr>
<tr>
<td>Mason City</td>
<td>31,000</td>
<td>1</td>
</tr>
<tr>
<td>Fort Dodge</td>
<td>17,000</td>
<td>&lt;1</td>
</tr>
<tr>
<td>Burlington</td>
<td>15,000</td>
<td>&lt;1</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>3.2M</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>
# Flights from Iowa Airports
*(Spring 2005)*

<table>
<thead>
<tr>
<th>Airport</th>
<th>Airlines</th>
<th>Direct Destinations</th>
<th>Daily Flights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Des Moines</td>
<td>6</td>
<td>15</td>
<td>45</td>
</tr>
<tr>
<td>Cedar Rapids</td>
<td>5</td>
<td>8</td>
<td>41</td>
</tr>
<tr>
<td>Sioux City</td>
<td>1</td>
<td>1</td>
<td>7</td>
</tr>
<tr>
<td>Waterloo</td>
<td>1</td>
<td>1</td>
<td>8</td>
</tr>
<tr>
<td>Dubuque</td>
<td>1</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>Mason City</td>
<td>1</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Fort Dodge</td>
<td>1</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Burlington</td>
<td>1</td>
<td>1</td>
<td>3</td>
</tr>
</tbody>
</table>
Non-Stop Flights from Iowa Airports
Issues facing air service in Iowa

• Direct flights
• Lack of route competition
  – (6/8 airports have one carrier)
• Passenger screening (wait times)
• Congestion at connecting airports
• Airline health
• Leakage???
How Does Iowa Attract and Retain Quality Air Service?

• Fly from Iowa airports
  Airlines will not take chances. We must show them the numbers!

• Incentives are a part of the game!

• Airlines will not set up in a community if they are going to steal business from themselves. (Southwest and Omaha example)
ANNUAL AIR SERVICE SEATS FROM IOWA AIRPORTS
TOTAL SEATS BY AIR CARRIER
Prepared by Iowa DOT - Office of Aviation
2,302,144 Seats Available - Jan 2005

Airlines Serving Iowa

Northwest: 34%
American: 26%
United: 22%
Delta Connection: 9%
Allegiant Air: 3%
America West Express: 3%
Continental Express: 2%
Skyway: 1%
Passenger Air Service Trends

• Network carriers are in trouble
  – Global route system
  – Pressure from fuel and low cost carriers

• Low-cost Airlines
  – Point to point
  – Lower cost (simple route structure, one type of plane, newer work force, fewer perks)
    • Putting pressure on network carriers
    • Allegiant Airlines service to Las Vegas and Orlando
General Aviation

- Small grass fields to enhanced regional airports
- Benefits of GA
  - 5,400 public use airports nationwide- point to point access- Time savings
  - Business and personal travel
  - Charter
  - Other uses (Your Local Airport brochure)
Demand

• Aviation forecast for the U.S. and Iowa shows positive growth for the next 20 years.
  – Estimates of 1-5% annual growth
  – But, there are some dynamics that could change that:
Future Market Drivers

- Time management
- Sport Pilot Rule
- New generation aircraft
  - Very Light Jets (VLJ) a.k.a. MicroJets
  - Lower acquisition/operating expenses
New Aircraft Shipments

- Piston aircraft hit 20 year high in 2004

<table>
<thead>
<tr>
<th>Aircraft Shipments</th>
<th>2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pistons</td>
<td>2465</td>
</tr>
<tr>
<td>Turboprops</td>
<td>365</td>
</tr>
<tr>
<td>Business Jets</td>
<td>750</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>3,580</strong></td>
</tr>
</tbody>
</table>
Ponder this…….

- According to FAA/NASA report, if 2% of airline passengers convert to using general aviation, this alone would double air traffic in the U.S.
- FAA forecast passenger air service to increase from 688 million in 2004 to more than 1 billion by 2015.
Effect of Growing Aviation Market

• Economic Impact
• Jobs
  – Pilots
  – Mechanics
  – Travel agents
  – Support personnel
  – Education
  – Suppliers
Summary

• Aviation will continue to create jobs
• Aviation is strong and shows signs of growth
  – General aviation is poised for growth
  – Commercial aviation faces challenges, but is still forecasted to see significant growth.
For more information on aviation, go to the Office of Aviation web site at iawings.com