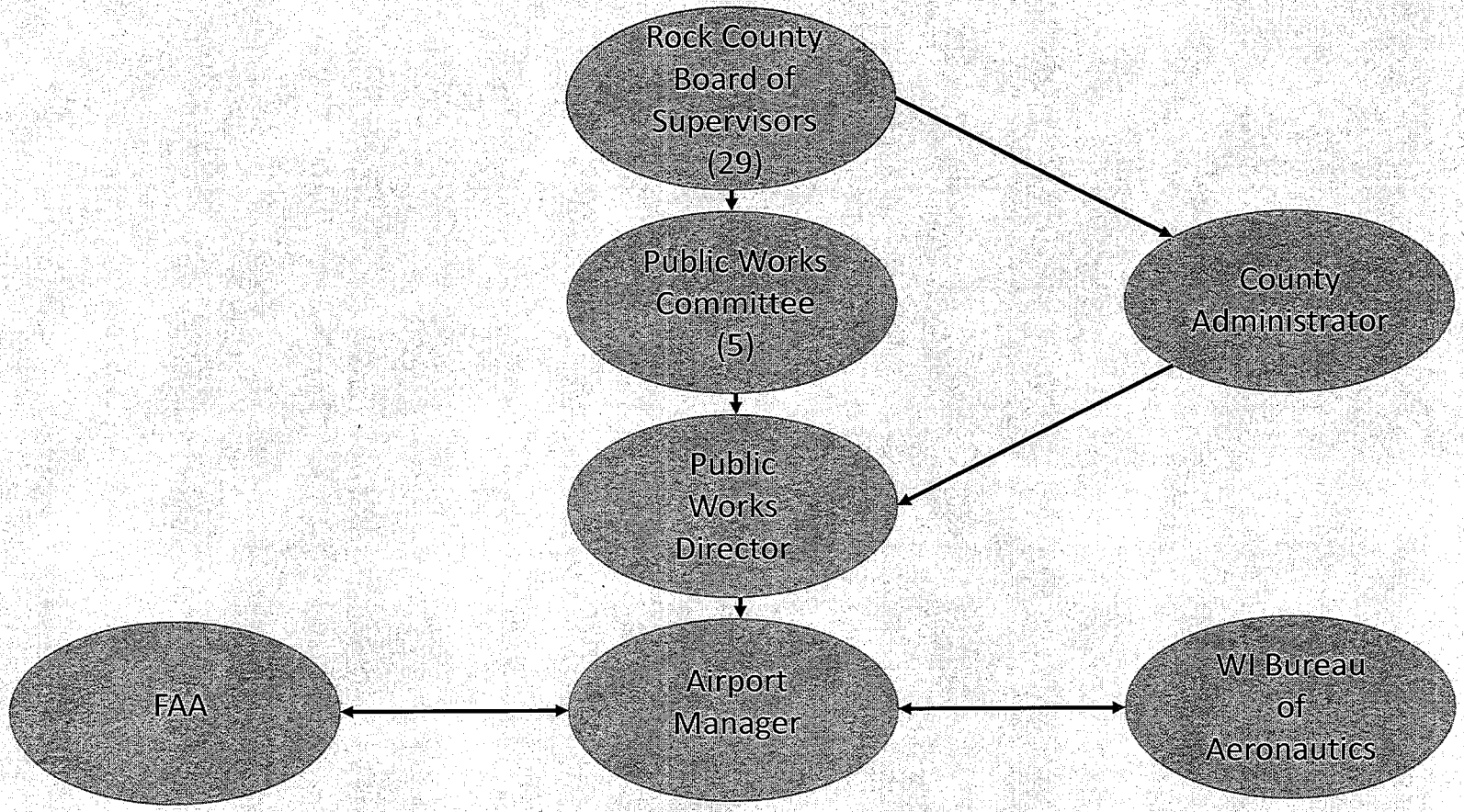
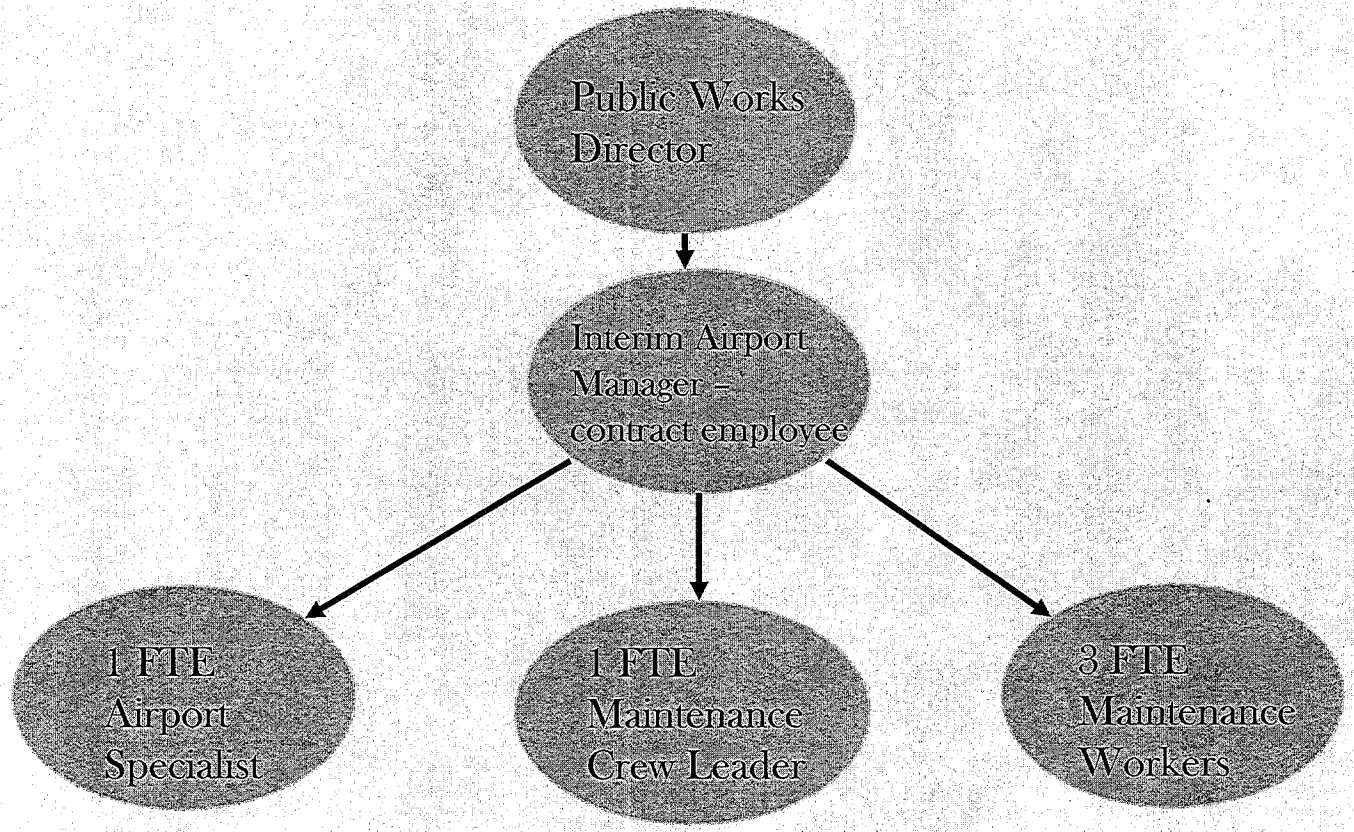
AGENDA
Ad Hoc Committee on Airport Future
Wednesday, June 27, 2018 at 12 noon
Southern Wisconsin Regional Airport – Voyager Room
1716 W. Airport Rd., Janesville, WI 53546

1. Call to Order – Brent Fox, Chair
2. Approval of Agenda
3. Review & Approve May 30, 2018 Minutes
4. Citizen Participation, Communications, and Announcements
5. Review and Decision on Committee Scope:
   - A. A review of the implications of FAA 139 certification (importance of being authorized to provide public passenger service, effect on businesses operations, need for fire suppression function, and impact on County operational activities)
     1) Benefits outweigh negatives
     2) Compliance expenses not exorbitant
     3) Joint Use Fire Station
   - B. Economic development opportunities;
     1) Economic Impact Study (Pending)
     2) T-Hangar Development potential
     3) Innovation Drive Extension
   - C. Management structure (s)
     1) Governance Options
        a) Existing Structure & Comparable WI Airports
        b) Overview of Governance Options - Rich Greenlee, Corporation Counsel
     2) Management Options
   - D. Operational and facility functions.
     1) Minimum Standards Review Needed
6. Additional Issues identified by Committee
   - A. General Aviation Trends
7. Next Steps
8. Next Meeting Date
9. Adjournment

Southern Wisconsin Regional Airport Governance




Public Works Director
Interim Airport Manager – contract employee
1 FTE Airport Specialist
1 FTE Maintenance Crew Leader
3 FTE Maintenance Workers

Roles & Responsibilities

- County Board of Supervisors – Oversee the operation and execution of Rock County finances and assets, making decisions with the best interest of all taxpayers in mind.
- Public Works Committee – Five County Supervisors that oversee the Highway, Parks, and Airport sections. They ensure County revenue and expenditures are being effectively managed within the resources given to each department and report when necessary to the County Board.
- Public Works Director – Directly manages all facets of the County's road and highway infrastructure while providing oversight and guidance to Parks and Airport Managers. Overseas all budgets within Public Works and administers personnel actions to 90+ employees.
- Airport Manager – Directly responsible for the safe and efficient flow of aircraft operating at Southern Wisconsin Regional Airport. Manages the airport budget and ensures FAA and state regulations are met. Negotiates agreements and manages lease and rental assets. Supervises 5 full-time employees.

How Similar WI Airports Are Governed

Airport Name	Owned By	Part 139	Managed By	Reports To	Governed By
Rhinelander	City & Oneida County	Yes	Airport Director	3-member Commission	Commission
Eau Claire	Eau Claire & Chippewa Counties	Yes	Airport Director	Commission Chair	7-member Commission
Oshkosh	Winnebago County	Yes (only during EAA)	Airport Director	County Executive	5-member Aviation Committee
Waukesha	Waukesha County	No	Airport Manager	Public Works Director	5-member Airport Commission
Sheboygan	Sheboygan County	No	Airport Superintendent	Highway Commissioner	5-member Transportation Committee
Kenosha	City	No	Airport Director	City Administrator	5-member Airport Committee
Wisconsin Rapids	Wood County	No	Airport Manager	Commission Chair	4-member Airport Commission

4

AIR FACTS
the journal for personal air travel—by pilots, for pilots
https://airfactsjournal.com/

/ SEPTEMBER 6, 2017

General Aviation Trends In 12 Charts

by John Zimmerman (https://airfactsjournal.com/author/johnz/)

What's the state of the general aviation industry? That's a question we hear at lot at Air Facts, sometimes by prophets of doom looking for confirmation, sometimes by new pilots trying to get a handle on the community they have just joined, and sometimes by outsiders who genuinely don't know. Unfortunately there's no simple answer, although plenty of pilots are willing to offer one.

Answering the question is hard because, for a start, "general aviation" includes a huge variety of airplanes, pilots, and operations. A powered parachute soaring at treetop level on a quiet evening is lumped in with a Gulfstream flying from JFK to LAX. So an assessment of the industry's health really depends on which part of the aviation world you inhabit.

Another problem is history, or more precisely, the questioner's perspective. Compared to 1978, general aviation looks utterly shattered by most measures – active pilots, new airplane deliveries, number of airports, etc. On

the other hand, if you learned to fly in 2009, things look a lot better. Which one is a more legitimate comparison?

Finally, there are some changes that can't be measured in statistics. Free ADS-B weather on an iPad is dramatically better than talking to Flight Service over the radio, but there isn't a great way to measure that improvement in FAA data. Likewise, widely available self-serve fuel, less expensive non-certified avionics, and a more flexible FAA enforcement philosophy help pilots, but in less measurable ways.

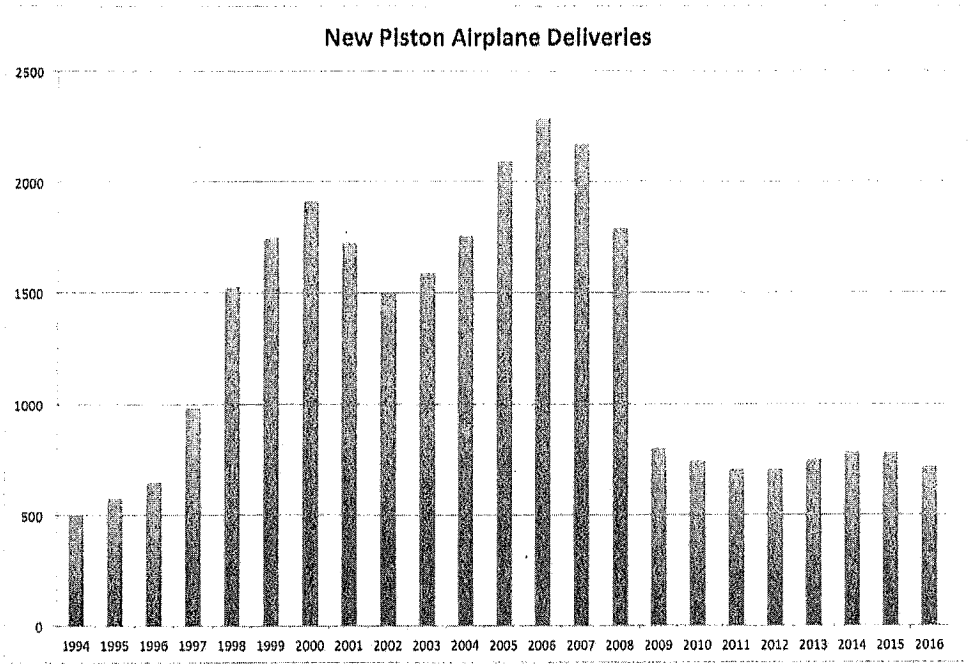
With all those caveats in mind, here's a look at 12 interesting charts that offer a glimpse of general aviation in the 21st century, from airplanes to pilots to safety. Together, they suggest a few trends and raise some questions too. More than anything, these charts shows how general aviation continues to change.

NOTE: click on a chart to see it full size.

Airplanes and Activity

1. New airplane sales still stink.

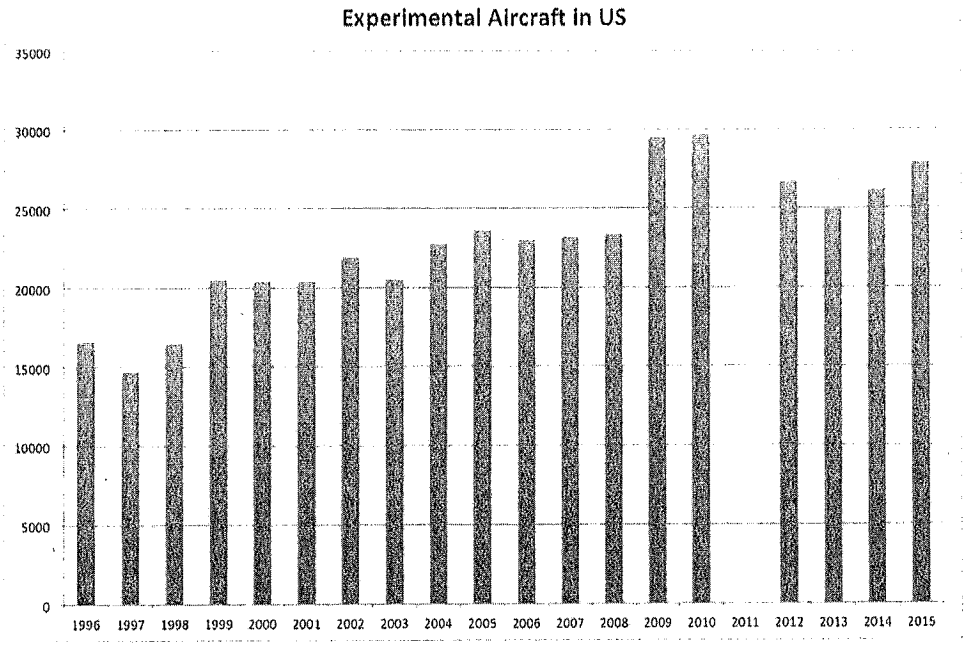
One popular yardstick is the number of new piston airplane sales (published by GAMA(https://gama.aero/facts-and-statistics/statistical-databook-and-industry-outlook/)), and it's quite obvious that these fell off a cliff during the Great Recession and have not recovered. I don't think this chart is necessarily a great way to take the pulse of the industry, but it does highlight how general aviation is much more about restoration and upgrades to old airplanes than it is new airplanes. It's also a reminder that any significant new safety technology has to address the 95% of the fleet that was built before 2000 – OEM isn't enough to move the needle.



(http://sportysnetwork.com/airfacts/files/2017/08/Screen-Shot-2017-08-29-at-4.39.29-PM.png)

2. But experimental airplanes are more popular than ever.

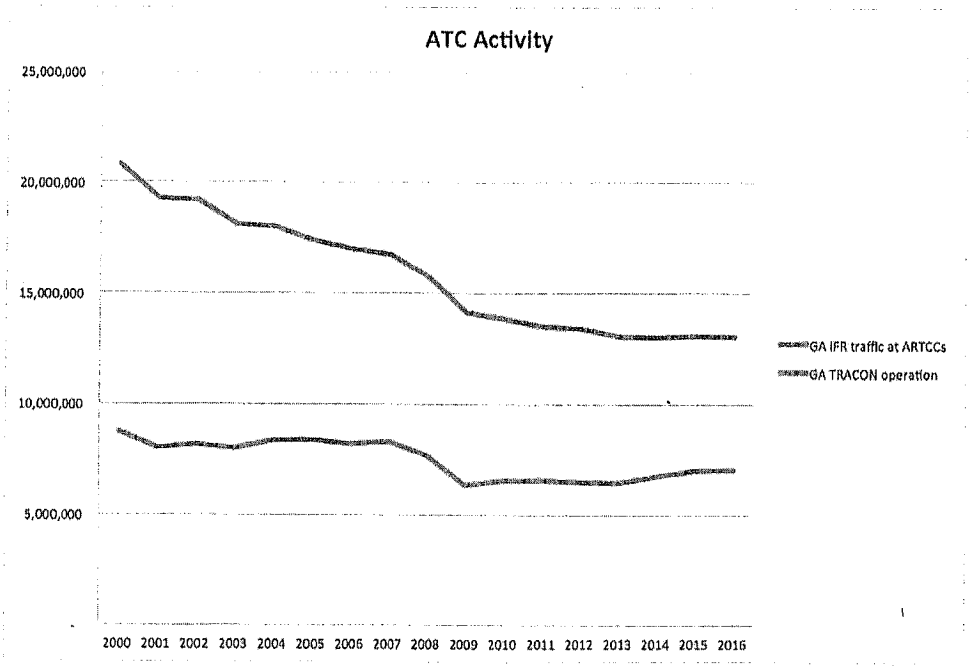
With new piston deliveries so weak, is there a bright spot? Yes – experimental airplanes are growing in popularity and make up an increasingly large part of the GA fleet. They are also increasingly sophisticated and packed with advanced technology that is driving the market in many cases. The Van's RV series isn't quite the 21st century successor to the Cessna 100 series, but the market is slowly moving that way.



(http://sportysnetwork.com/airfacts/files/2017/08/Screen-Shot-2017-08-29-at-4.39.42-PM.png)

3. GA airplanes aren't flying as much as they used to.

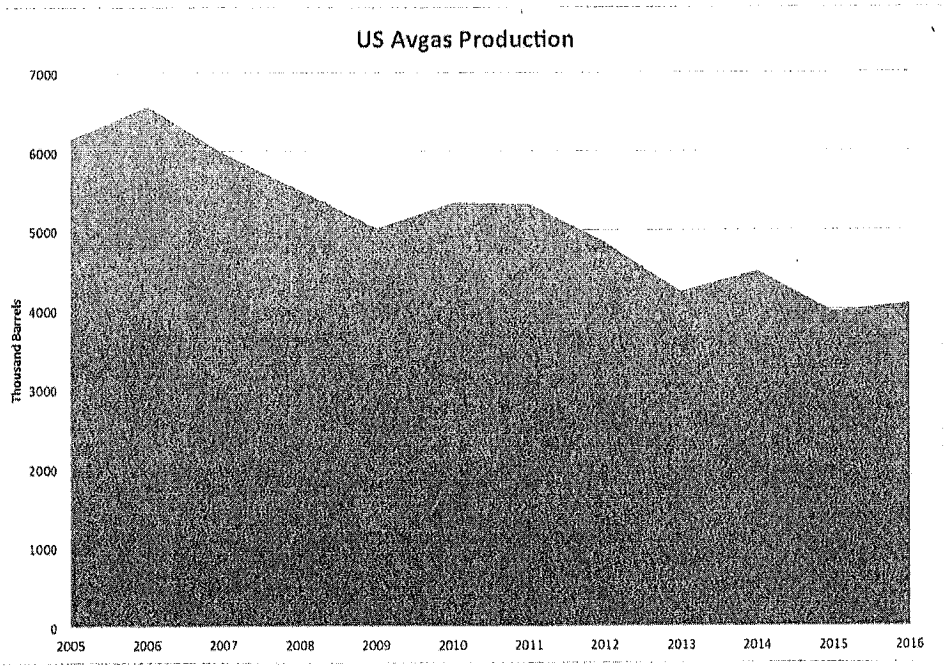
General aviation activity – at least with approach control and centers – has likewise not recovered from the Great Recession, although it has leveled out recently. This could be a result of less flying overall, or simply less use of ATC services.



(http://sportysnetwork.com/airfacts/files/2017/08/Screen-Shot-2017-08-29-at-4.44.03-PM.png)

4. Avgas is sliding towards irrelevance.

Avgas volume is another measure of activity, and after seeing the new airplane sales and ATC activity charts the slope of this one won't be a surprise. But this is also a reminder of how small avgas volume is in the context of the global energy market: it's down over 30% compared to 2006, and is less than 1% of jet fuel production. As new powerplants hit the market (unleaded gas engines, diesel, electric), expect this volume to continue dropping.

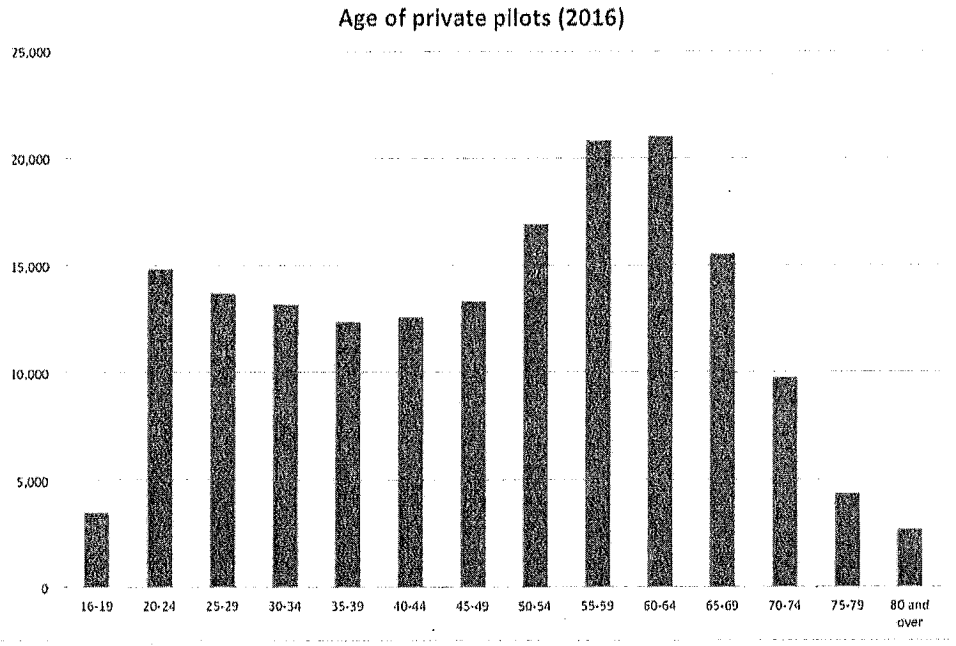


(http://sportysnetwork.com/airfacts/files/2017/09/Screen-Shot-2017-09-05-at-5.09.54-PM.png)

Pilots

5. Private pilots aren't as old as you think.

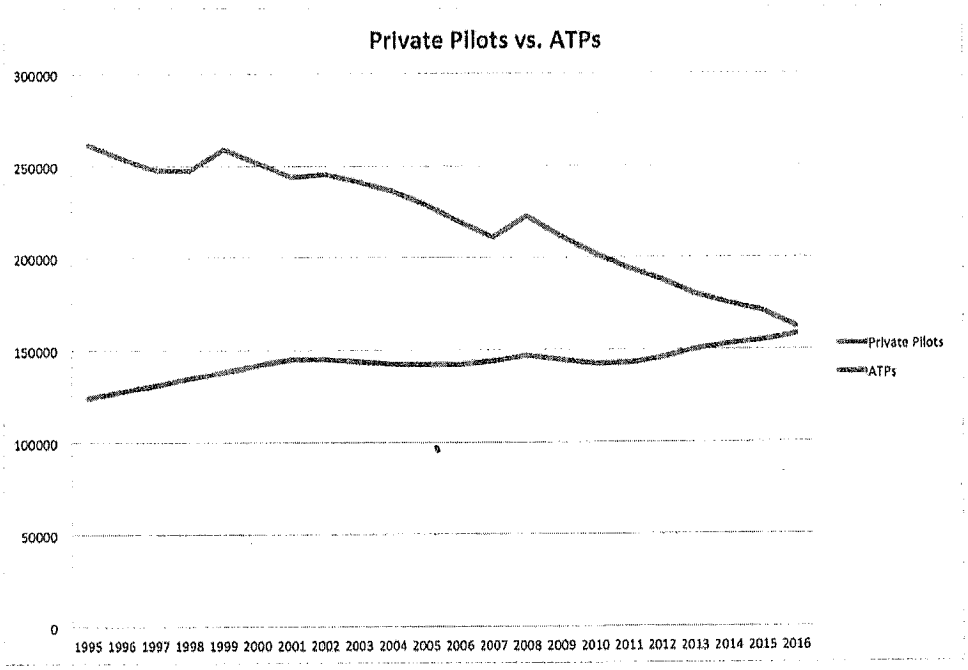
Student pilot starts and active private pilots are frequently cited statistics that measure the health of general aviation, but both are flawed. The former is subject to all kinds of noise (BasicMed, new plastic certificates), while the latter is just a guess (who is really active?). The distribution of age for private pilots is a more interesting chart to consider. It appears to peak at ages under 30, dominated by those pursuing a career in aviation, then fades through the 30s before booming between ages 50-70, when time and money are often more abundant. The average age of a private pilot in 2016 was 48.4, but this is not exceptional: it was 56.4 for sport pilots, 46.0 for commercial pilots, and 50.2 for ATPs.



(http://sportysnetwork.com/airfacts/files/2017/08/Screen-Shot-2017-08-28-at-6.09.04-PM.png)

6. ATPs will soon overtake private pilots.

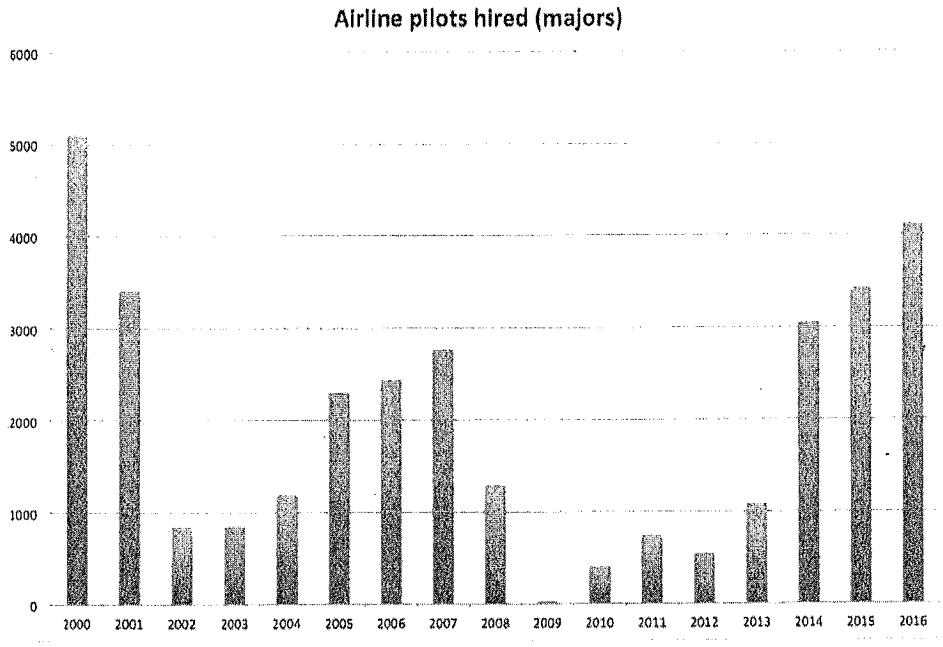
Here is that chart of active private pilots, but instead of just looking at the trend line, consider it in comparison to ATPs and you'll see a major trend. The pilot population is increasingly professional, not recreational: active private pilots are declining, but active ATPs are increasing.



(http://sportysnetwork.com/airfacts/files/2017/09/Screen-Shot-2017-09-05-at-5.13.44-PM.png)

7. Airline hiring is booming.

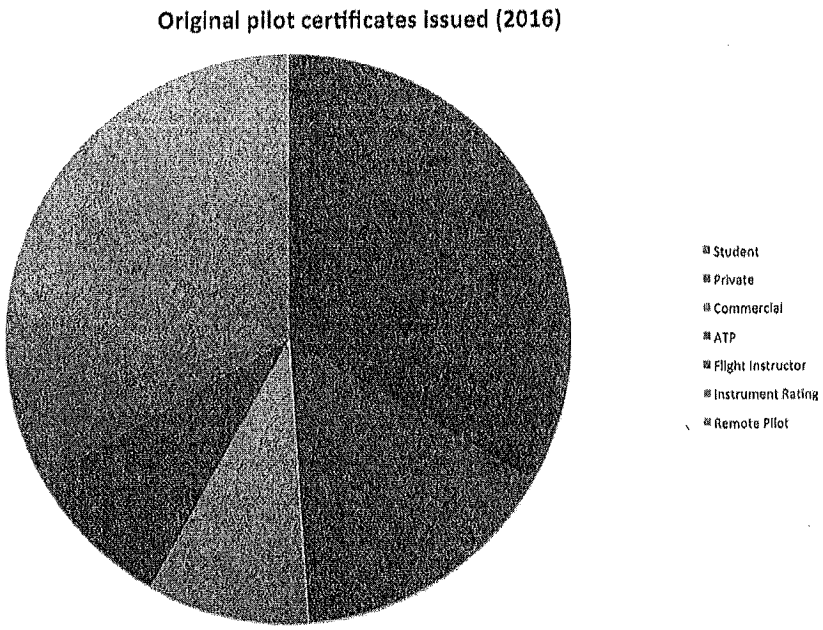
Airline hiring trends (via FAPA(http://fapa.aero)) back this up, with regionals, legacy, and majors all hiring in numbers not seen since the pre-9/11 era. This is also an under-appreciated driver of overall aviation industry strength right now – primary flight training has picked up as new pilots chase a career with the airlines.



(http://sportysnetwork.com/airfacts/files/2017/08/Screen-Shot-2017-08-31-at-10.52.46-AM.png)

8. And so are remote pilots.

Also worth noting is that more Remote Pilot certificates were issued last year than Private Pilot certificates. Certainly it's a lot easier to become a drone pilot than a Cessna pilot, but it's another an indicator of how the makeup of the pilot population is changing.

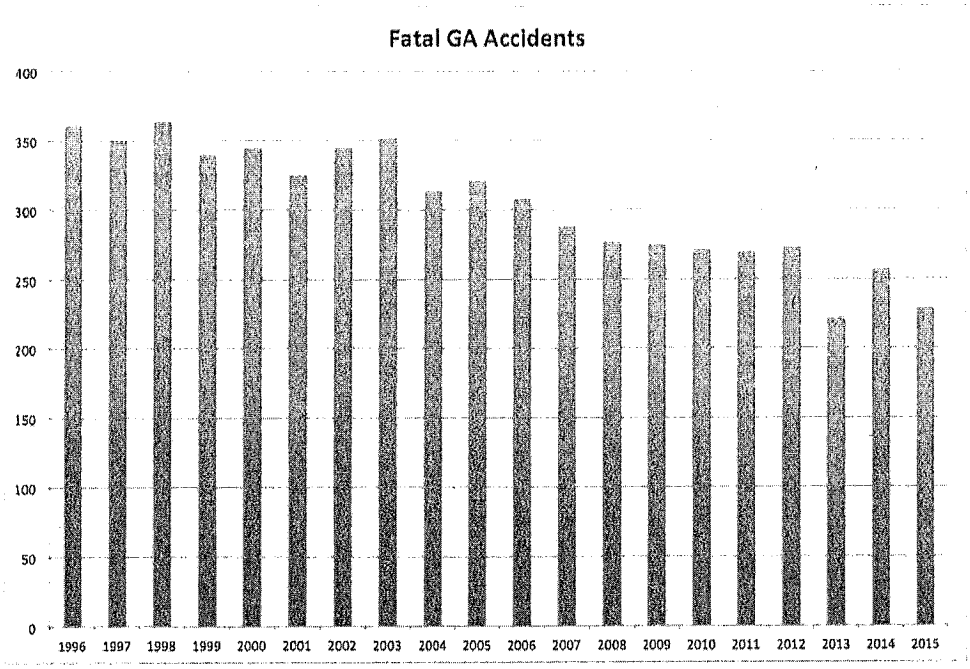


(http://sportysnetwork.com/airfacts/files/2017/08/Screen-Shot-2017-08-31-at-10.31.38-AM.png)

Safety

9. Fatal accidents are declining.

Besides the number of pilots and airplanes, one important measure of industry health is safety, and fatal accidents are the place to start. The headline number is declining, albeit slowly. Obviously this could be due to either safer flying or lower levels of activity. The FAA attempts to measure an accident rate (fatal accidents per 100,000 hours flown), but this is, at best, a rough guess. Even using that measure, the same trend holds: a steady but slow decline.

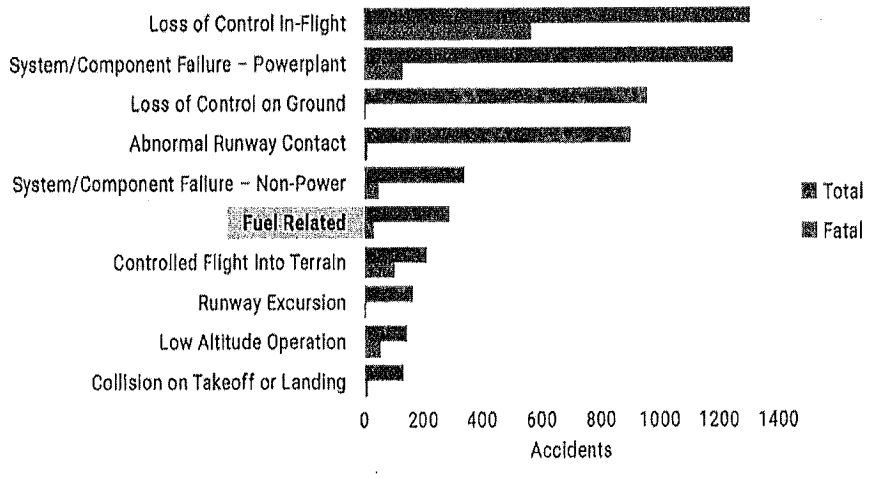


(http://sportysnetwork.com/airfacts/files/2017/08/Screen-Shot-2017-08-31-at-10.12.01-AM.png)

10. The causes are not new.

Beyond the total, it's worth exploring why pilots crash airplanes. The story is depressingly familiar, with loss of control leading the list. This has received massive amounts of attention in recent years, but note how many accidents are caused by powerplant failures and runway accidents.

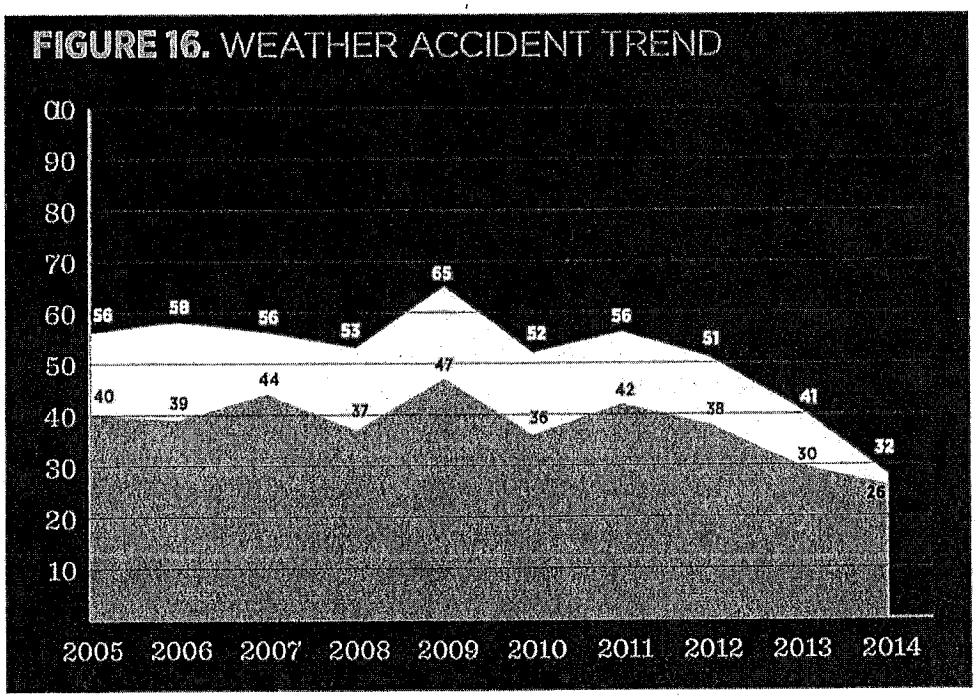
Figure 1. Top Ten General Aviation Accident Occurrence Categories, 2011–2015



(http://sportysnetwork.com/airfacts/files/2017/08/Screen-Shot-2017-08-30-at-1.48.48-PM.png)

11. Weather accidents are getting rarer – is it technology?

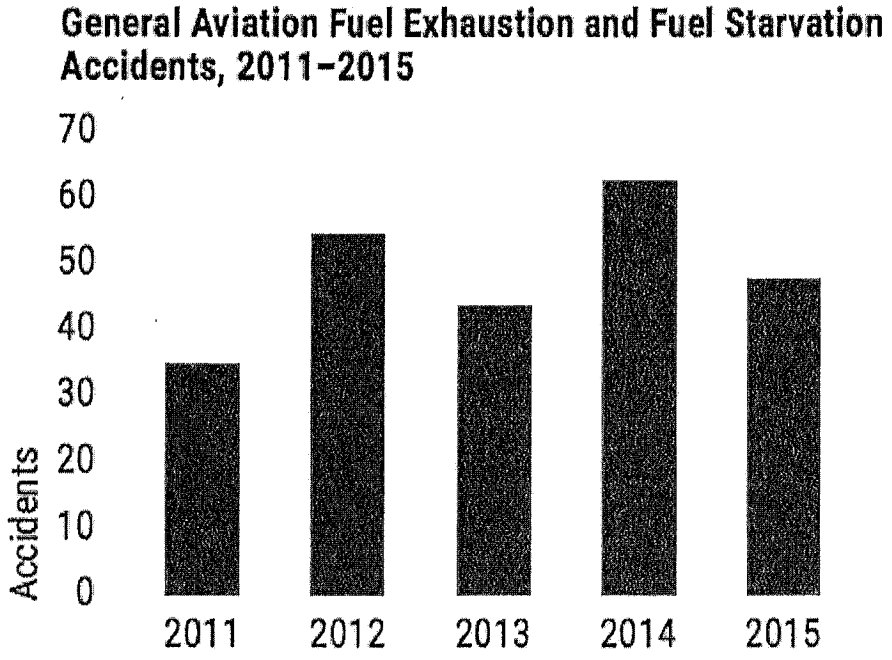
On the positive side, weather-related accidents seem to be declining, according to the AOPA Nall report(https://www.aopa.org/-/media/files/aopa/home/training-and-safety/nall-report/26thnallreport2017.pdf). The most common cause of a weather accident is continued VFR into IMC conditions (69% in 2014), so perhaps technology is helping pilots avoid these traps. Alternatively, perhaps there's less cross-country flying going on.



(http://sportysnetwork.com/airfacts/files/2017/08/Screen-Shot-2017-08-31-at-10.20.42-AM.png)

12. But we still haven't solved fuel exhaustion and starvation.

Another familiar accident cause – fuel exhaustion or starvation – has not gone away. As an NTSB alert(https://www.ntsb.gov/safety/safety-alerts/Documents/SA-067.pdf) recently highlighted, roughly 50 airplanes crash every year because there was either no fuel on board the airplane or no fuel getting to the engine. This most preventable accident has not been solved by technology, at least not yet. The answer may be in the left seat.



(http://sportysnetwork.com/airfacts/files/2017/08/Screen-Shot-2017-08-30-at-1.49.15-PM.png)

Conclusions?

None of these charts tells a complete story, but when combined it is fairly easy to determine the state of the industry. The 2008-2009 financial crisis clearly dealt a heavy blow to general aviation activity, and there has not been a major recovery from it yet (although there is some reason to think 2017 data may be slightly more encouraging). The word "pilot" increasingly means professionals and drone operators, not just recreational flyers. And while the safety record may be improving slightly, airplanes still crash because a pilot lost control or ran out of gas.

The more things change, the more they stay the same.