



**Federal Aviation
Administration**

Fact Sheet – FAA Forecast Fact Sheet [1]–Fiscal Years 2011-31

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Contact: Henry J. Price

Phone: 202-267-3883

I. 2010 Summary: Economic Activity And Air Travel

- U.S. Gross Domestic Product (GDP) increased 2.2%; world GDP increased 3.6%.
- Domestic mainline yields increased 5.2% while international yields increased 10.0%. In real terms (adjusted for inflation), domestic yields increased 3.4% and international yields increased 8.1%.
- Domestic enplanements on mainline and regional air carriers increased from 630.8M in 2009 to 635.3M (0.7%) in 2010. Domestic mainline carrier enplanements dropped 0.7% while domestic regional carrier enplanements increased 5.0%. International enplanements on mainline and regional air carriers increased from 73.6M in 2009 to 77.4M (5.2%) in 2010. Mainline and regional international enplanements were both up 5.2%, respectively.
- Domestic RPMs by mainline and regional air carriers increased from 548.6B in 2009 to 555.8B (1.3%) in 2010. Domestic mainline carrier RPMs increased 0.5% and domestic regional carrier RPMs increased 6.7%. International RPMs by US carriers increased from 221.3B in 2009 to 230.9B (4.3%) in 2010. Total system RPMs increased from 769.9B in 2009 to 786.7B (2.2%) in 2010. Total mainline carrier RPMs increased by 1.7% while total regional carrier RPMs increased by 6.6%.
- U.S. commercial air carriers (including passenger and cargo) reported an operating profit of \$9.5B in 2010, compared to an operating profit of \$849.8M in 2009. Operating revenues increased 7.0% in 2010, while operating expenses increased 1.6%.
- In 2010 total landings and takeoffs at combined FAA and contract towers were down 3.2% from 2009. Air carrier activity decreased by 1.4% while commuter/air taxi activity decreased by 1.1%. General aviation activity dropped 5.1% while military aircraft activity rose 0.9%.

II. Economic Assumptions For FAA Forecasts

- U.S. Real GDP is forecast to increase from \$13.2T in 2010 to \$23.1T in 2031, an average annual rate of 2.7%. World GDP is forecast to grow at a faster pace of 3.3% over the same 21-year period, from \$51.0T to \$100.7T.

GDP by World Region (Average Annual Percent Growth)

World Region	Fiscal Year				Calendar Year			
	2010	2011	2012	2011-31	2010	2011	2012	2011-31
U.S	2.2	2.3	2.8	2.7	2.8	2.4	2.9	2.7
World	na	na	na	na	3.6	3.0	3.5	3.3
Canada	na	na	na	na	2.9	2.3	2.9	2.3
Europe/Afr/ME	na	na	na	na	2.2	2.1	2.4	2.4
Latin America	na	na	na	na	4.5	4.4	4.5	4.2
Asia/Pacific	na	na	na	na	6.2	4.6	5.0	4.6

- Inflation is projected to increase 1.1% in 2011 and remain moderate over the remaining 20 years of the forecast period, averaging 2.0% annually.

III. Aviation Activity Forecasts

Mainline Air Carrier and Regionals

- Total mainline air carrier and regional RPMs are forecast to increase from 786.7B in 2010 to 1.71T in 2031, an average annual rate of 3.8%. Domestic RPMs are projected to increase 3.5% in 2011 and then grow an average of 3.1% per year during the remaining 20-year forecast period. International RPMs are forecast to increase 8.4% in 2011 and then grow an average of 4.8% per year for the rest of the forecast period.
- Total mainline air carrier and regional enplanements are forecast to increase from 712.6M in 2010 to 1.27B in 2031, an average annual rate of 2.8%. Domestic enplanements are projected to increase 3.0% in 2011 and then grow an average of 2.5% per year during the remaining 20-year forecast period. International enplanements are forecast to increase 7.8% in 2011 and then grow an average of 4.3% per year for the rest of the forecast period. Total system enplanements are expected to reach one billion in 2021.

Mainline Air Carriers

- U.S. mainline carrier domestic RPMs are forecast to increase 3.4% in 2011 and grow at an average annual rate of 2.9% for the remaining 20 years of the forecast period. U.S. mainline carrier domestic enplanements are forecast to increase 2.8% in 2011. For the remaining 20 years of the forecast period, enplanements grow at an average annual rate of 2.4%, reaching 785.8M in 2031.
- U.S. mainline carrier international RPMs are forecast to increase 8.4% in 2011 and grow at an average annual rate of 4.9% for the remaining 20 years of the forecast period. U.S. mainline carrier enplanements are forecast to increase 7.9% in 2011, and then grow an average of 4.4% per year thereafter, reaching 190.4M in 2031. The fastest growing region is Asia/Pacific (5.0% per year), followed by Latin America (4.9% per year), and the Atlantic (3.7% per year).

U.S. Mainline Air Carriers: Enplanements by World Region (Average Annual Percent Growth)

World Region	Fiscal Year			
	2010	2011	2012	2011-31
Domestic	(0.7)	2.8	3.2	2.4
International	5.2	7.9	4.6	4.4
Atlantic	(1.0)	8.7	4.5	3.5
Latin America	8.8	7.5	4.7	4.7
Asia/Pacific	7.5	7.9	4.6	4.9
System	0.1	3.5	3.4	2.8

- Total passengers to/from the U.S. (U.S. and foreign flag carriers) are projected to increase 3.1% in 2011 (calendar year). The average annual rate of growth between 2010 and 2031 is 4.5%, with passengers increasing from 149.6M to 373.9M. The fastest growing region is Latin America at 5.1% per year, followed by Asia/Pacific (5.0% per year), Atlantic (3.9% per year) and Canadian Transborder (3.4% per year).

U.S. Mainline & Foreign Flag Air Carriers: Passengers by World Region (Average Annual Percent Growth)

World Region	Calendar Year			
	2010	2011	2012	2011-31
Total U.S./Foreign Flag	1.4	3.1	5.7	4.5
Atlantic	(0.9)	1.3	6.0	4.1
Latin America	2.3	4.5	5.2	5.1

Asia/Pacific	2.9	4.6	7.7	5.0
Canadian Transborder	3.4	2.8	4.0	3.4

- Domestic mainline passenger real yield (adjusted for inflation) is forecast to increase from 12.57 cents in 2010 to 12.82 cents in 2011 (up 2.0%). Thereafter, domestic mainline carrier real yield declines at an average rate of 0.8% dropping to 10.97 cents in 2031. International mainline real yield is forecast to increase from 12.86 cents in 2010 to 13.51 cents in 2011 (up 5.0%). Thereafter, international real yield declines at a rate of 0.9% annually, falling to 11.24 cents by 2031.

U.S. Mainline Air Carriers: Real Yield (Average Annual Percent Growth)

Region	Fiscal Year			
	2010	2011	2012	2011-31
Domestic	3.4	2.0	1.3	(0.8)
International	8.1	5.0	0.6	(0.9)

- U.S. mainline air carrier passenger jet fleet increases from 3,713 aircraft in 2010 to 5,888 aircraft in 2031, an average annual increase of 2.2%. The fleet is projected to shrink by 0.5% in 2011 (19 aircraft), with most of the decrease attributed to the grounding of less fuel-efficient aircraft.

Regional Carriers

- Regional carrier enplanements are forecast to increase 3.4% to 170.0M in 2011, and grow 2.8% a year thereafter, reaching 295.9M in 2031.

U.S. Regional Air Carrier Enplanements (Average Annual Percent Growth)

Region	Fiscal Year			
	2010	2011	2012	2011-2031
Domestic	5.0	3.4	3.2	2.8
International	5.2	3.4	3.2	2.8

- Regional carrier RPMs are forecast to increase 4.3% in 2011 and grow at an average annual rate of 4.1% for the remaining 20 years of the forecast period.
- The regional carrier passenger aircraft fleet increases from 2,577 aircraft in 2010 to 3,384 aircraft in 2031, an average annual increase of 1.3%. The fleet is projected to grow by 1.2% in 2011 (31 aircraft).
 - Regional jets increase from 1,771 aircraft in 2010 to 2,764 aircraft in 2031, an annual increase of 2.1%. All of the increase is attributed to jet aircraft in the 70-90-seat category.

Cargo

- Total air cargo RTMs (freight/express and mail) increase from 35.9B in 2010 to 93.2B in 2031—up an average of 4.7% a year; domestic RTMs increase 2.8% a year; international RTMs increase 5.5% a year.

U.S. Commercial Air Carriers: Air Cargo Revenue Ton Miles (Average Annual Percent)

Region	Fiscal Year			
	2010	2011	2012	2011-2031
Domestic	8.0	4.2	6.1	2.7
International	20.6	6.4	8.1	5.4
Total	15.7	5.6	7.4	4.6

- The cargo fleet increases from 806 aircraft in 2010 to 1,251 aircraft in 2031, an average increase of 2.1% a year.

General Aviation

- The general aviation fleet increases from 224,172 aircraft in 2010 to 270,920 in 2031, growing an average of 0.9% a year.
 - Fixed-wing turbine aircraft grow at a rate of 3.1% per year, fixed-wing piston aircraft grow at a rate of 0.2% per year, and rotorcraft grow at a rate of 2.6% per year.
- General aviation hours flown are forecast to increase from 24.1M in 2010 to 37.8M in 2031, an average annual growth rate of 2.2% a year.
 - Fixed-wing turbine aircraft hours flown grow at a rate of 4.0% per year, fixed-wing piston aircraft hours flown grow at a rate of 0.7% per year, and rotorcraft hours flown grow at a rate of 3.0% per year.

IV. FAA Workload Forecasts

Operations at Airports with FAA Traffic Control and Contract Tower Service

- Total operations are forecast to decrease 0.6% to 50.9M in 2011, and then grow at an average annual rate of 1.6% for the remainder of the forecast period, reaching 69.4M in 2031. The average annual growth rate for the entire 21-year forecast period is 1.5%.
 - Commercial operations increase 2.3% in 2011, and grow at a rate of 2.1% thereafter, reaching 33.9M in 2031.
 - General aviation operations decrease 3.1% in 2011, and grow at a rate of 1.2% thereafter, totaling 32.9M in 2031.

Terminal Radar Approach Control (TRACON) Operations

- TRACON operations are forecast to increase 0.1% to 39.0M in 2011, and then grow at an average annual rate of 1.8% for the remainder of the forecast period, reaching 55.3M in 2031. The average annual growth rate for the entire 21-year forecast period is 1.7%.
 - Commercial TRACON operations increase 2.1% in 2011, and grow at a rate of 2.1% thereafter, reaching 35.0M in 2031.
 - General aviation TRACON operations decrease 3.3% in 2011, and grow at a rate of 1.5% thereafter, totaling 17.9M in 2031.

Aircraft Handled at Air Route Traffic Control Centers

- IFR aircraft handled at FAA air route traffic control centers are forecast to increase to 41.5M (2.4%) in 2011 and then grow 2.3% a year over the remaining 20 years of the forecast period, reaching 65.4M in 2031.
 - Commercial IFR aircraft handled increase from 31.0M in 2010 to 31.8M in 2011 (2.7%). Thereafter commercial IFR aircraft handled grow at an average annual rate of 2.6%, reaching 53.5M in 2031.
 - General aviation IFR aircraft handled increase 2.1% during 2011. Thereafter, general aviation IFR aircraft handled grow at an average annual rate of 1.4%, reaching 8.9M in 2031.

[1] All specified years are fiscal years (October 1 through September 30).

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