



European General Aviation Survey 2019

FINAL RESULTS

31 JANUARY 2020

GAMA-IAOPA EUROPEAN GA SURVEY 2019



5 Languages:



Final Totals:

Example Questions:



Hours Flown in last year



Operating costs/hour



State of Registration



Equipage



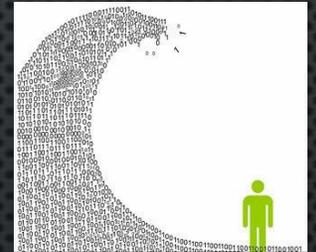
2,688 Individual Respondents



6,085 Aircraft



Registered in 32 countries



Over 130,000 data points
Analysed with the support of:

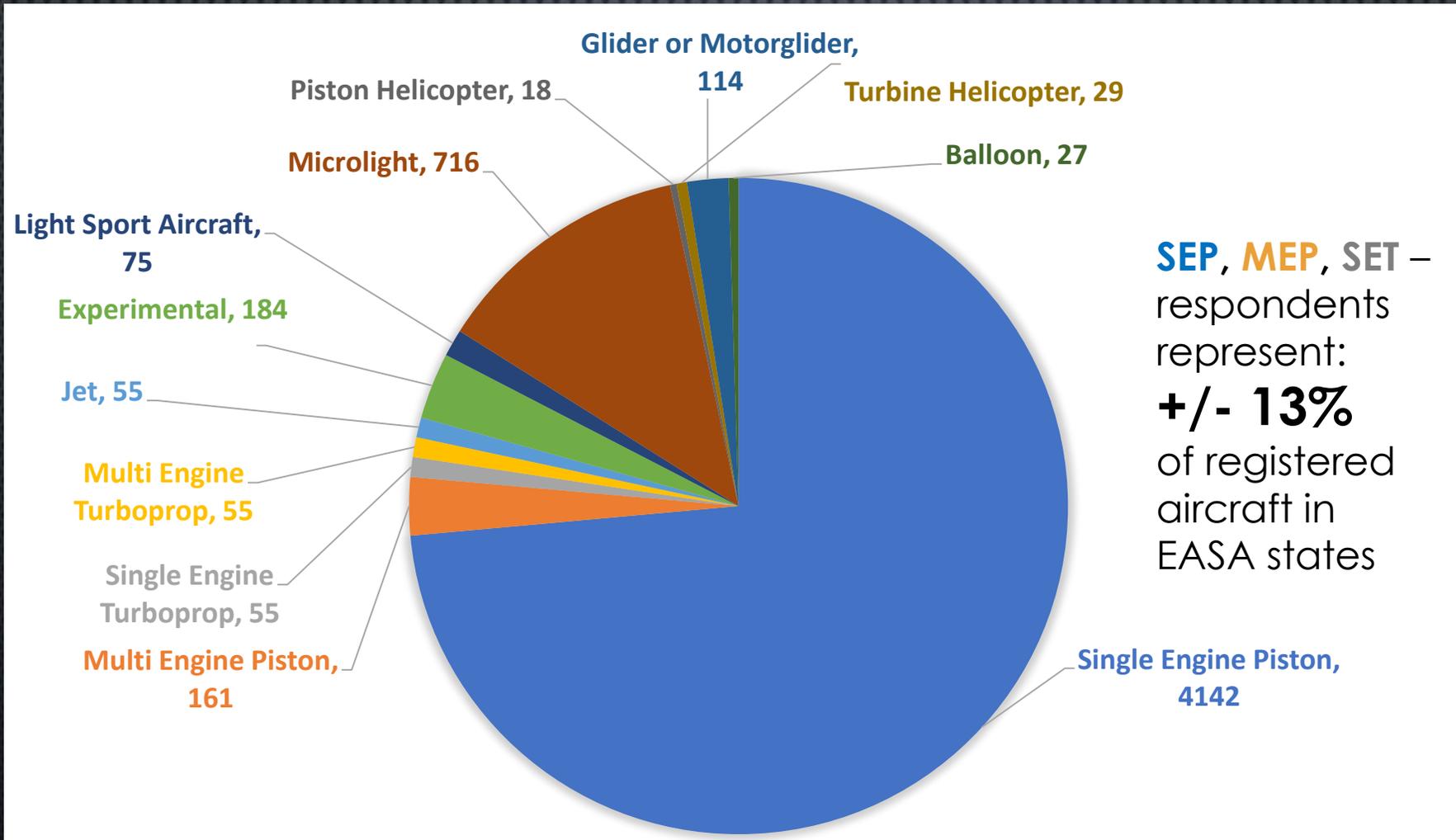


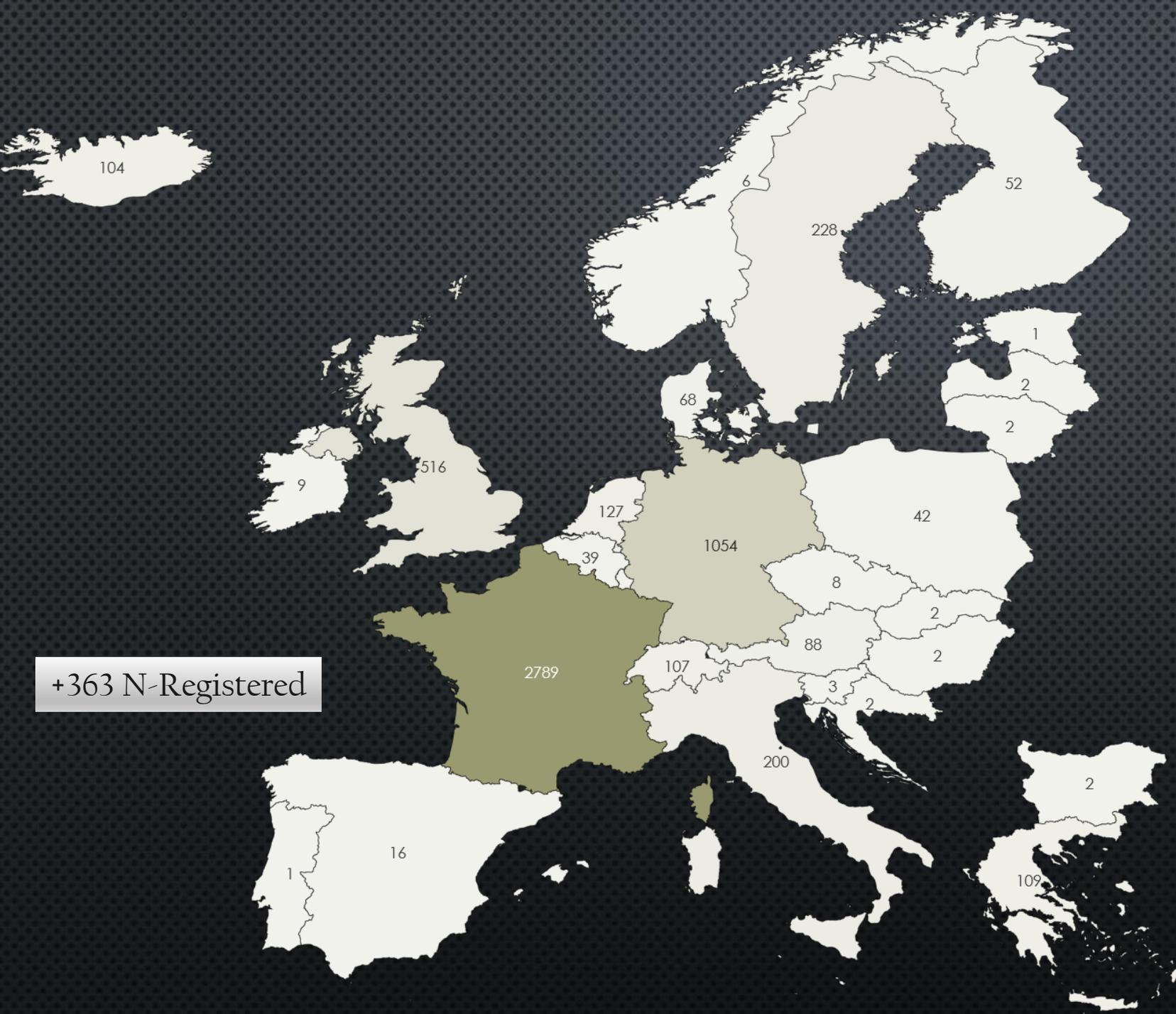
SURVEY METHODOLOGY



- Survey conducted from December 2018 to April 2019 – results based on 2018 calendar year.
- Geographic Scope = 32 EASA Member States.
- Extrapolation calculations made using registered aircraft fleet (assuming 90% active).
- Analysis focused on Single Engine Piston, Multi-Engine Piston and Single Engine Turbine aeroplanes.

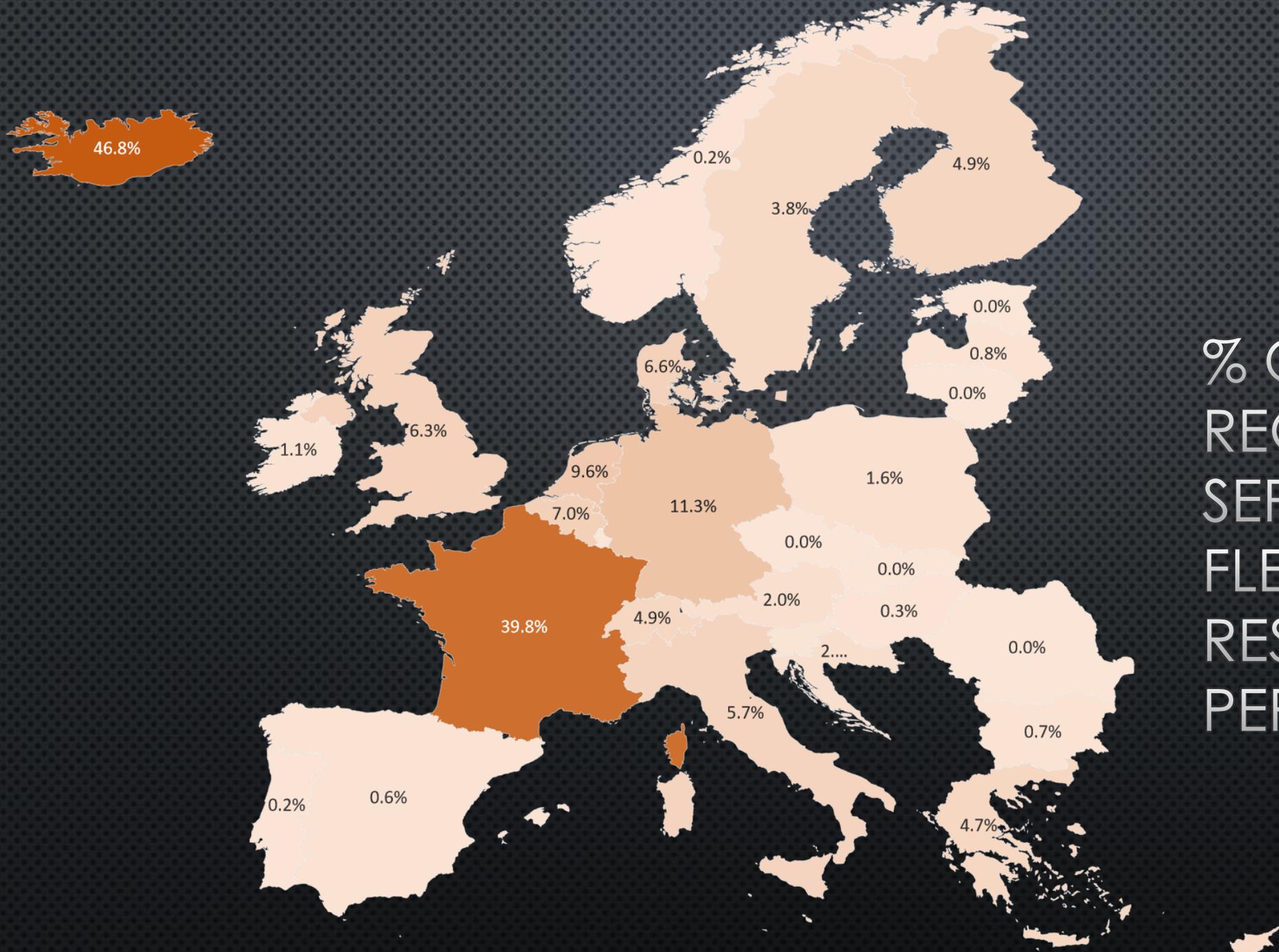
AIRCRAFT TYPE





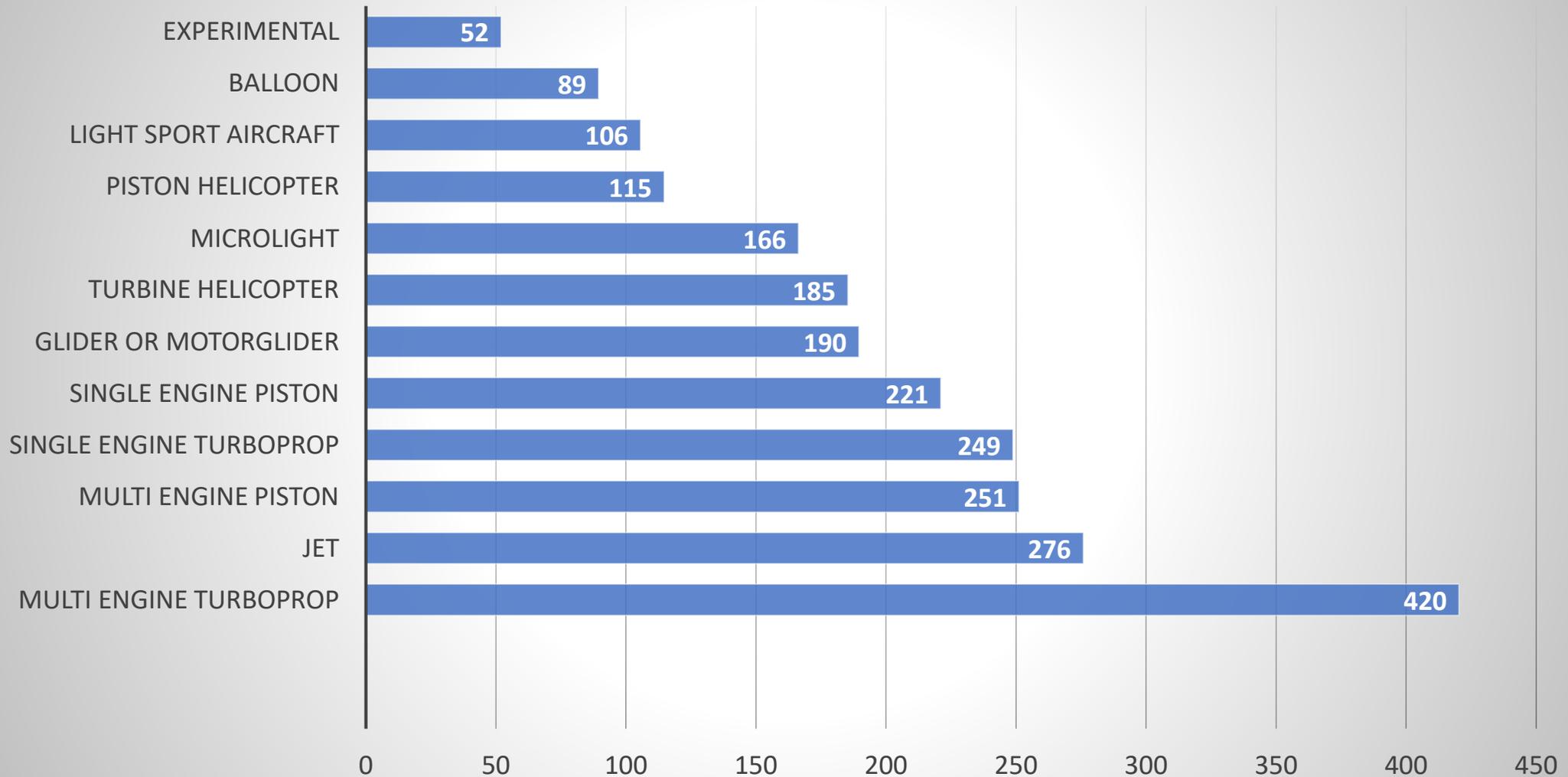
+363 N-Registered

SURVEY RESPONSES BY AIRCRAFT STATE OF REGISTRATION

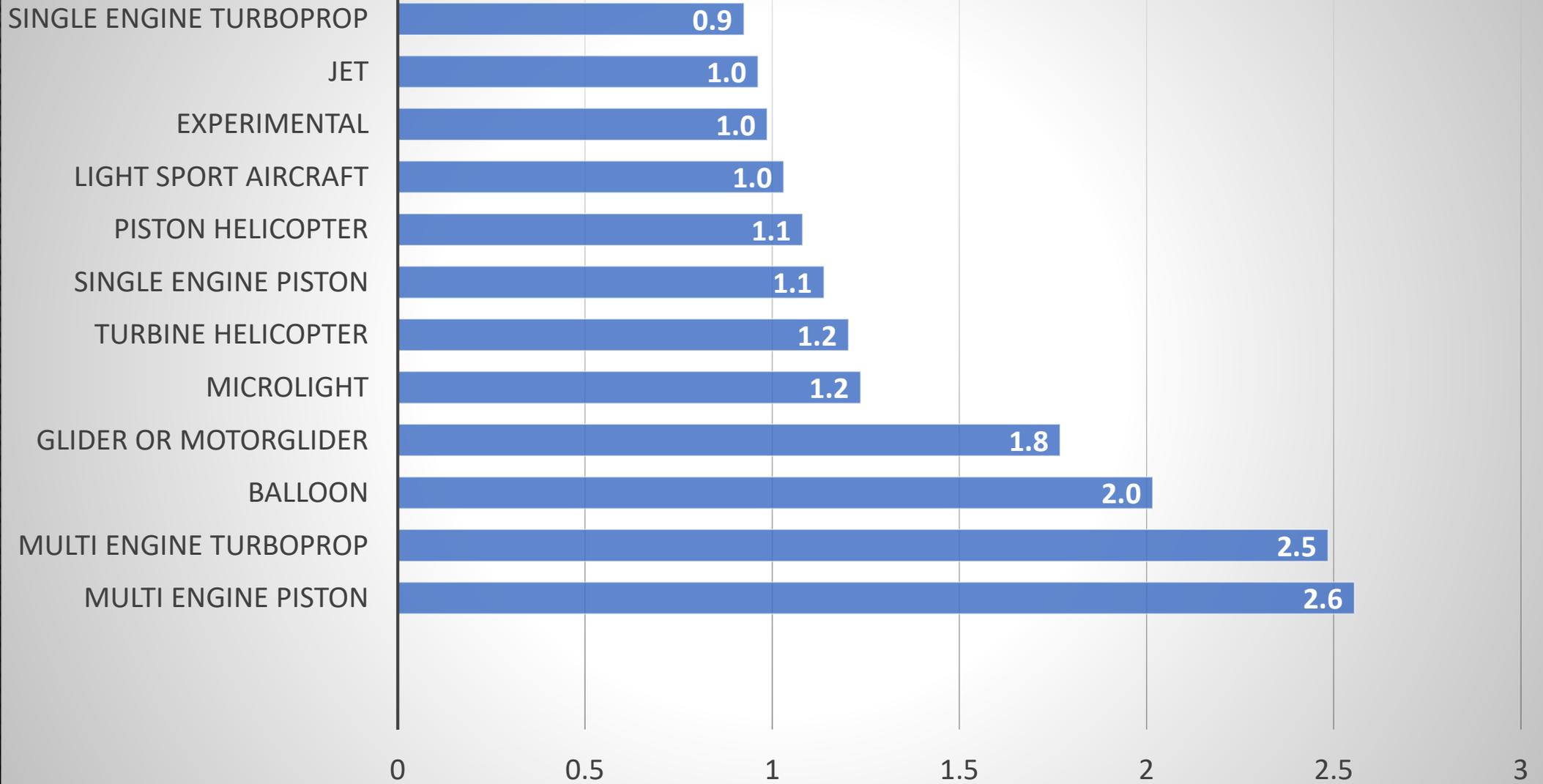


% OF REGISTERED SEP / SET / MEP FLEET RESPONDING PER COUNTRY

Average annual flight hours by aircraft category

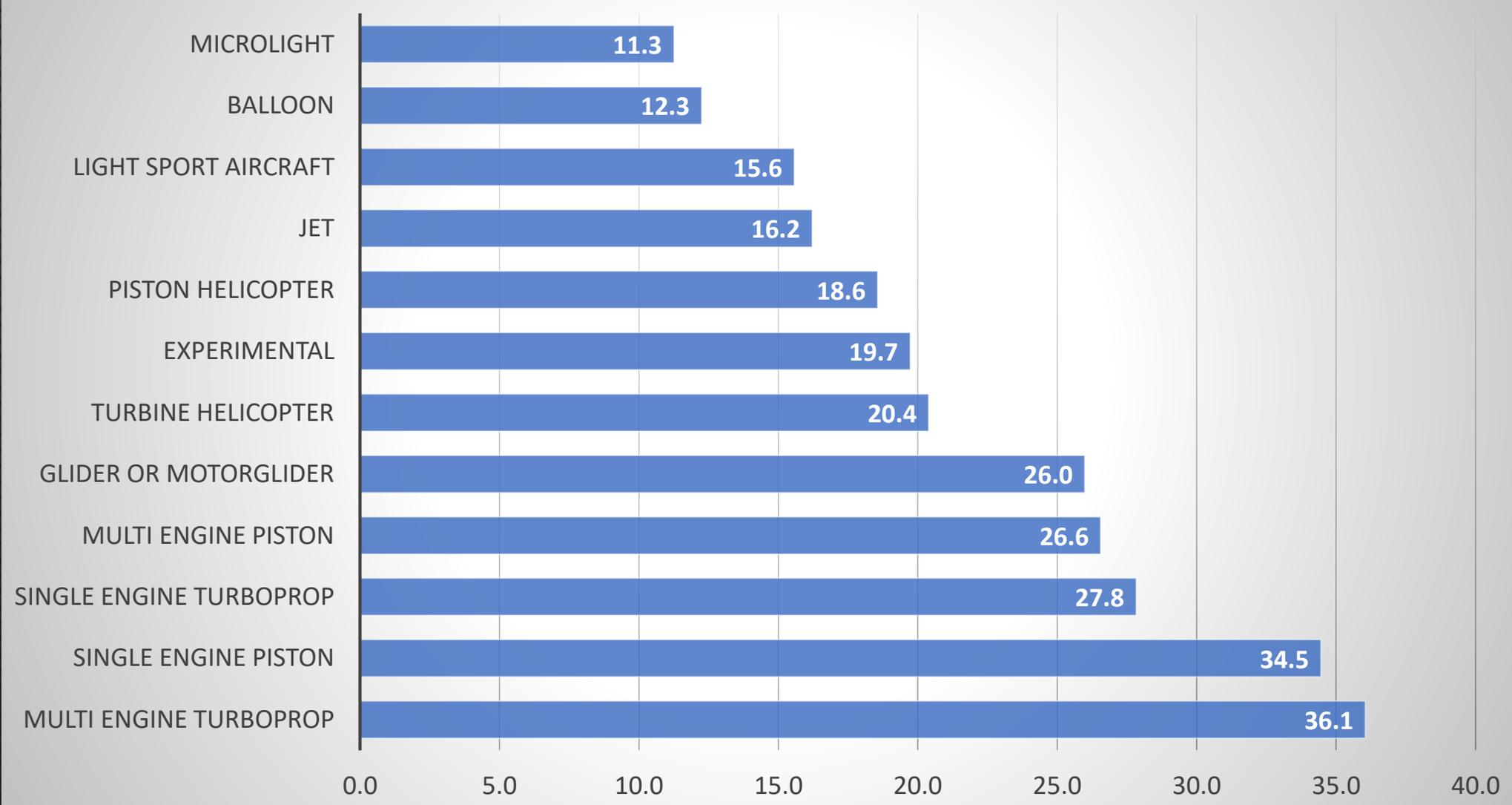


Average flight duration (hours)



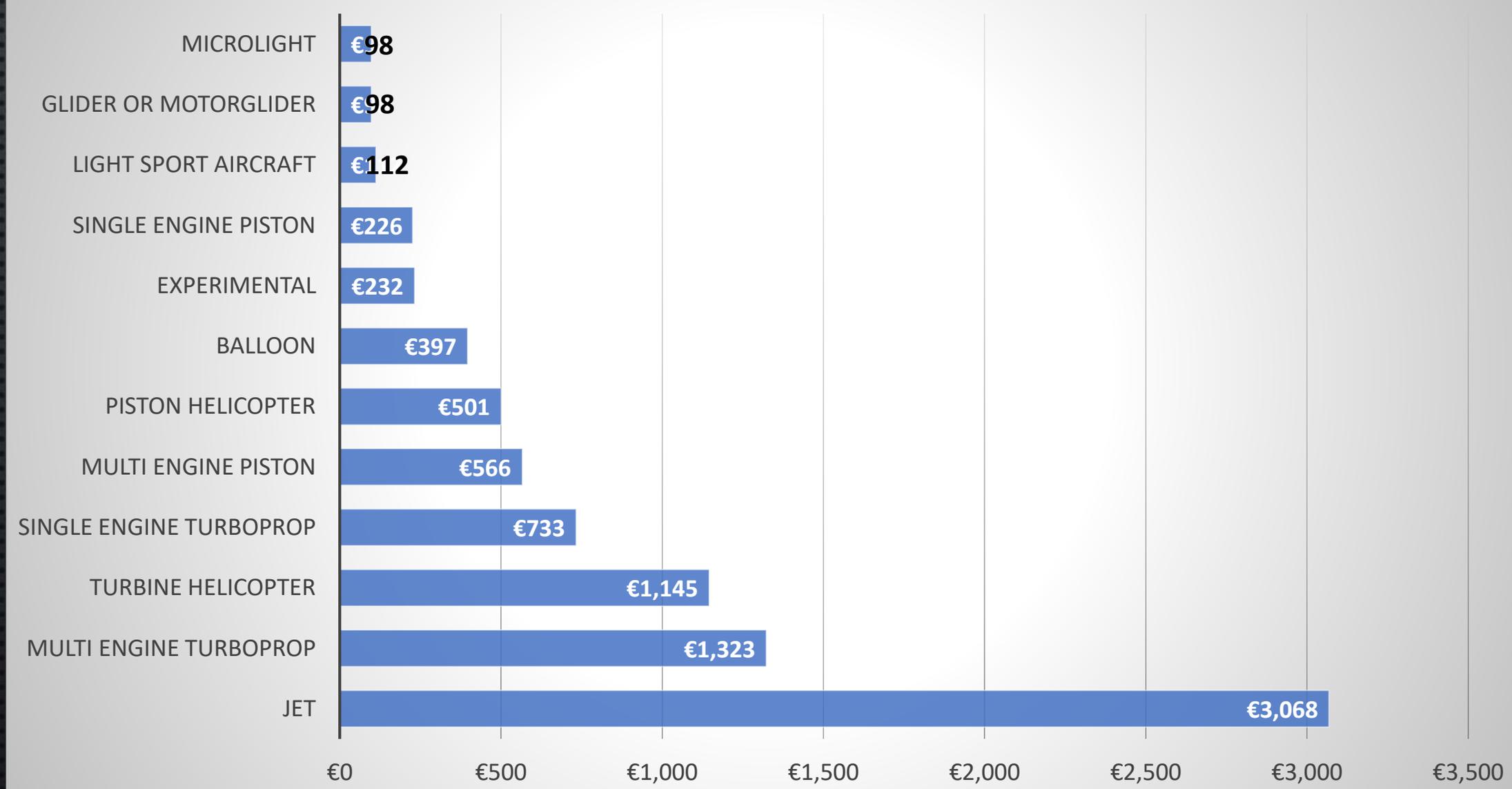


Average age of aircraft (years)





Operating cost per hour (EUR)



FOCUS OF ANALYSIS



**Single Engine Piston
aeroplanes***



**Single Engine Turbine
aeroplanes**



**Multi-Engine Piston
aeroplanes**

**EASA-Certified only –
not Annex I aircraft*

INTERESTING FIGURES

2018 – SINGLE ENGINE PISTON / MULTI-ENGINE PISTON / SINGLE ENGINE TURBOPROP



6.5 million

Estimated flight hours

5.9 million

Estimated number of flights

€1.7 billion

Economic Impact of GA flights

6.3 billion

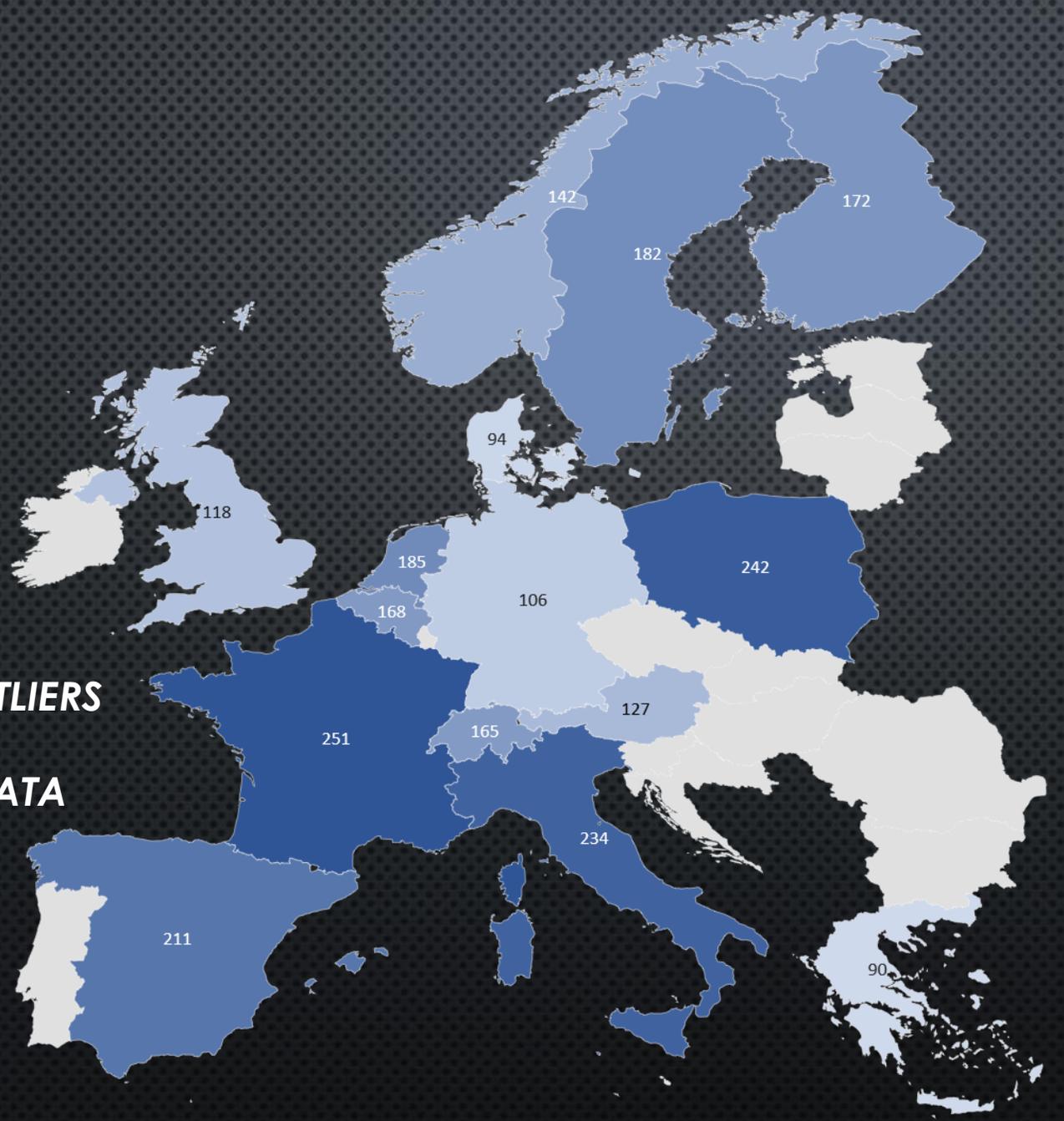
Pilot/passenger kilometres flown



AVERAGE
ANNUAL FLIGHT
HOURS PER
AIRCRAFT BY
STATE OF
REGISTRATION
(SEP, MEP AND
SET)

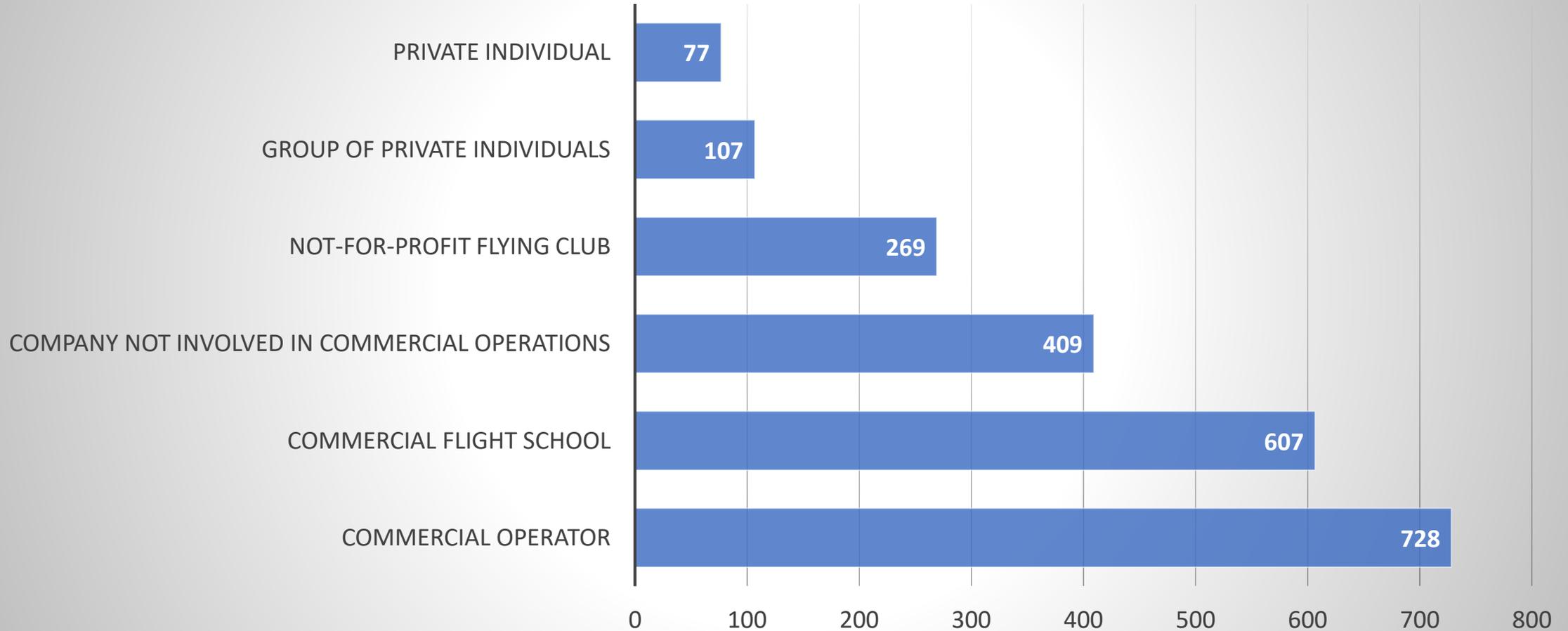


**REMOVING OUTLIERS
& STATES WITH
INSUFFICIENT DATA**

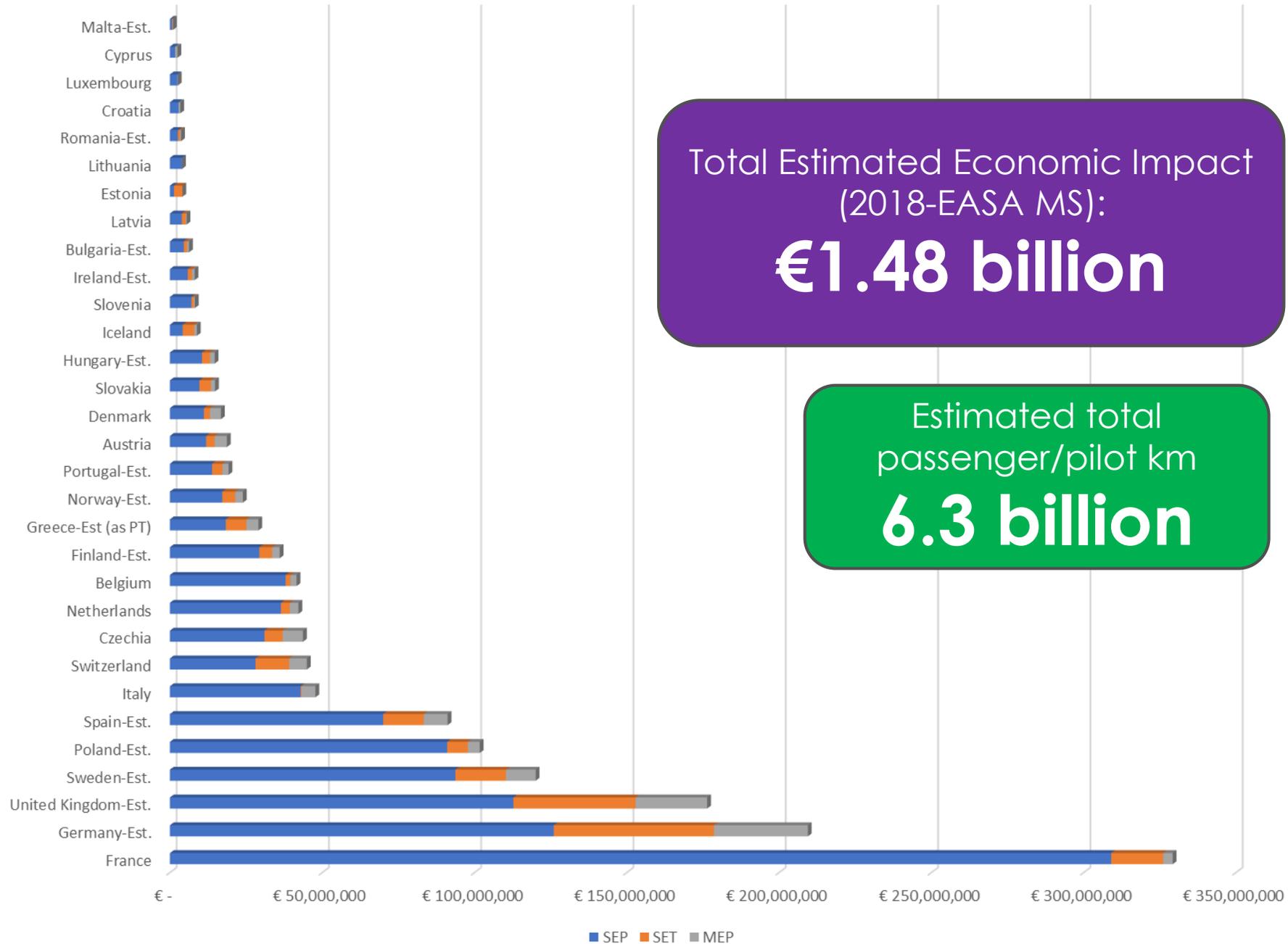


AVERAGE
ANNUAL FLIGHT
HOURS PER
AIRCRAFT BY
STATE OF
REGISTRATION
(SEP, MEP AND
SET)

Average annual flight hours per aircraft by operation type (SEP, MEP and SET)



Estimated Economic Contribution of Non-Commercial GA per Member State (SEP+SET+MEP)



SELECTED OPINION RESPONSES



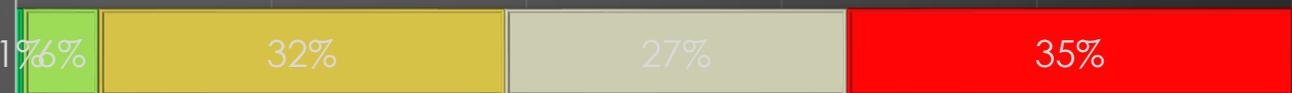
Are you aware of the EASA General Aviation Roadmap:



How much has EASA contributed to a positive development of General Aviation?



How did EASA regulations influence the development of your aircraft's cost so far?



How much has your National Aviation Authority contributed to a positive development of General Aviation?



0% 20% 40% 60% 80% 100%

■ strong positive ■ neutral ■ strong negative

The development and market availability of modern, energy-efficient and environmental-friendly engines and fuels is:



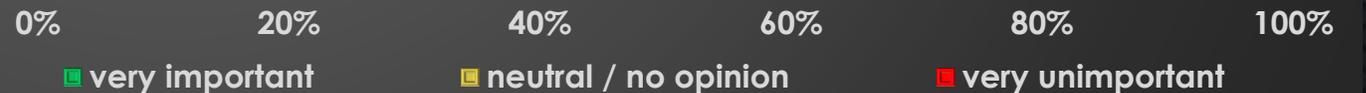
The development and market entry of modern airframes and avionics is:



Mutual acceptance of in Europe/the USA already certified aircraft or components and pilot licenses/ratings without additional and lengthy examinations is:



A more dense network of airfields with runway lengths between 1200m and 1500m is:



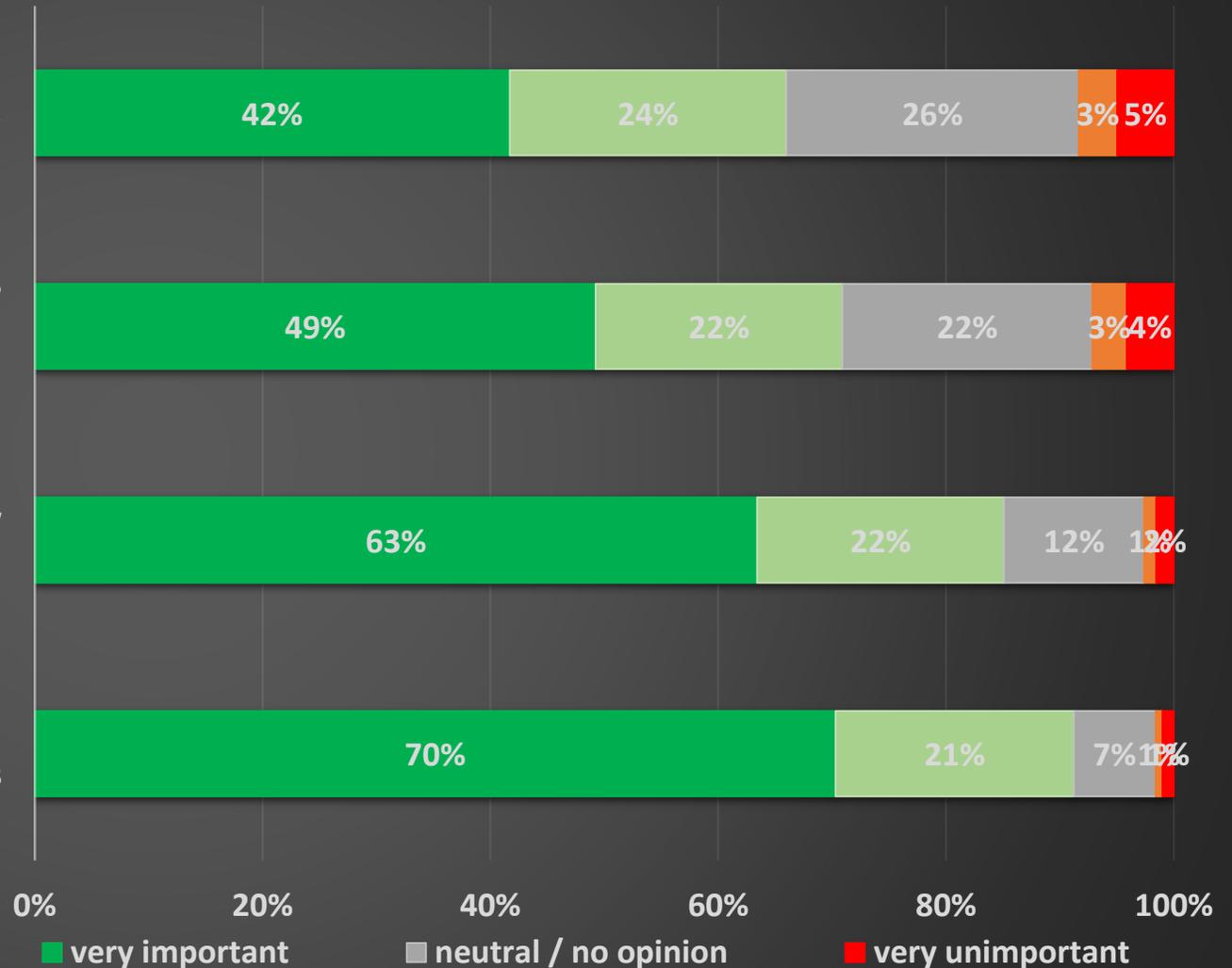


You consider an improved accessibility of many metropolitan regions via dedicated GA airfields, which can be used under IFR, as:

You consider the area-wide implementation of IFR approach procedures also for smaller airfields based on GPS, with vertical guidance (LPV) like in the USA in order to safely and reliably conduct flights also in bad weather, as:

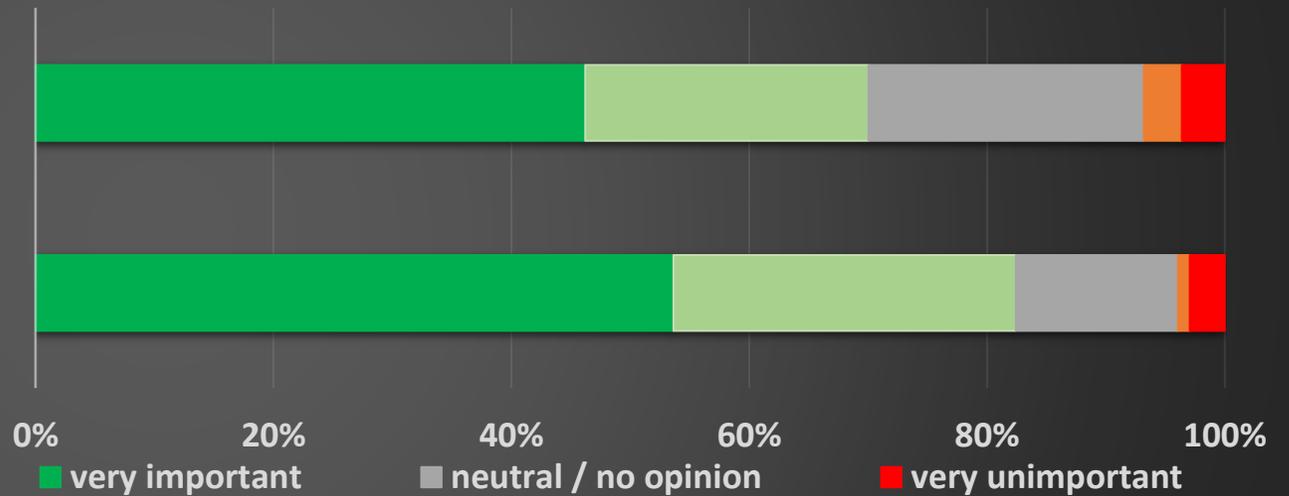
The integration of GA's specific interests in new European Air Traffic Management Concepts is:

For improving flight safety, the free provision of weather, traffic and NOTAM information during flight, as provided in the USA via low-cost receivers (ADS-B) and without a mandate for equipage, is:

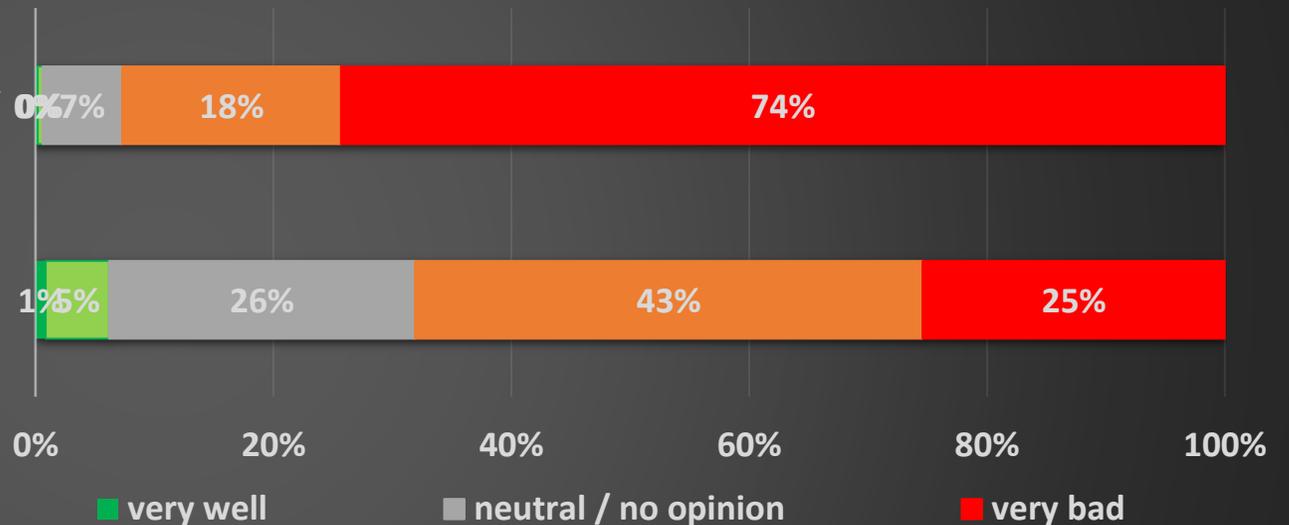


At smaller airfields less personnel should be in service in order to reduce cost ("unmanned towers" during hours of low traffic):

The general possibility to use smaller airfields also early in the morning or late in the evening is considered as:



Compared to other means of transportation GA is treated by politicians:



OVERALL FLIGHTS HOURS ESTIMATE & TRENDS



TOTAL 2018 SEP +
MEP + SET flight hours
estimate:

6,471,666

of which SEP

5,970,969

92%

MEP

179,472

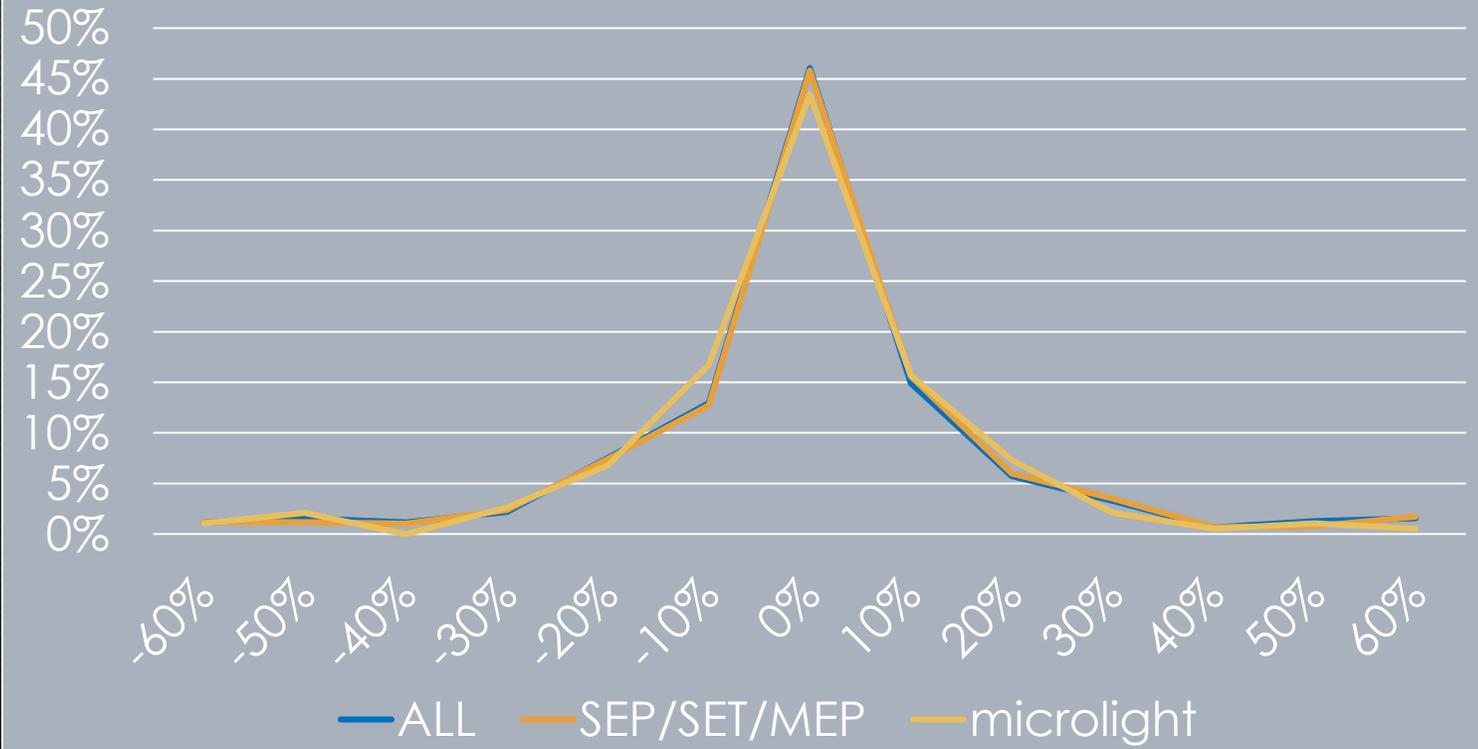
3%

SET

321,226

5%

Estimated Change in Flight Hours vs 2017



Change vs. 2017:	+0.6%	+0.3%	-0.8%
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FOR MORE INFORMATION ABOUT THIS SURVEY:



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