

MITRE Air Traffic Update: General Aviation

April 2021

The Unique Traffic Profiles of General Aviation Airports, Before and After the Pandemic



The FAA's Operations Network (OPSNET) defines general aviation (GA) as all non-military flights other than air carrier and air taxi operations. In essence, GA consists of personal and corporate flights, along with small aircraft charters. Back in [December](#), we highlighted data showing that GA traffic was recovering faster than commercial traffic. The OPSNET data shown in Figure 1 confirms that this is the case. Here, the blue line, representing itinerant¹ GA traffic, is relatively flat in comparison to the orange line, representing Air Carrier and Air Taxi traffic, which still remain well below pre-COVID levels.

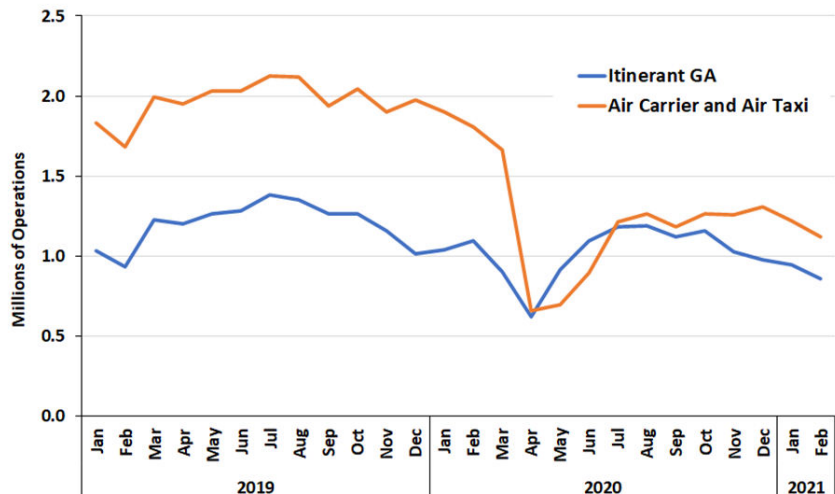


Figure 1. Itinerant GA and Commercial Operations for All OPSNET Airports

We thought it would also be interesting to look at some individual GA airports, as many of them have their own seasonal fluctuations in traffic. Figures 2 and 3 show monthly itinerant GA operations at Naples, Florida (APF) and Aspen, Colorado (ASE). Both show marked seasonality, although not the same pattern.

¹ Itinerant operations are defined as those that either land at an airport arriving from outside the airport area or depart from an airport and leave the airport area.

Traffic to and from Naples roughly doubles from January through March, as many people like to spend their winters in South Florida. Aspen—a popular ski destination—shows similar peaks during the winter months, and somewhat surprisingly, even larger traffic peaks during the summer, as visitors go to walk or bike in the mountains.

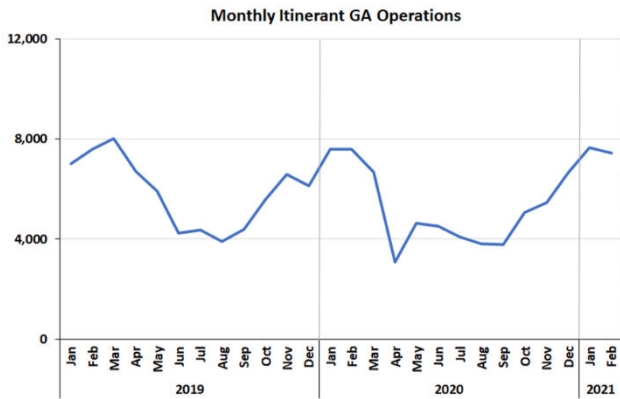


Figure 2. Naples, FL

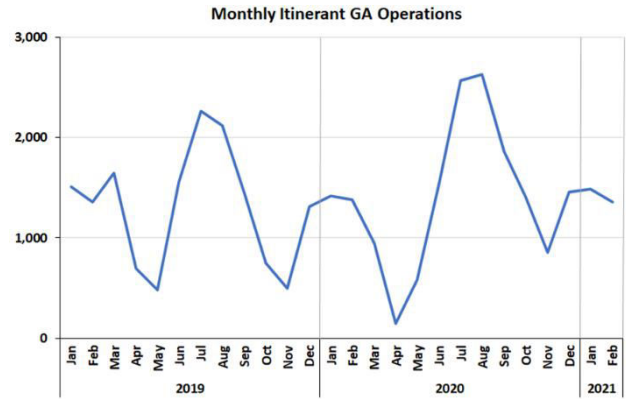


Figure 3. Aspen, CO

After the pandemic’s initial impact on traffic in March and April of last year, GA operations at both airports have since returned to or exceeded their previous historical levels for the season.

While both Naples and Aspen reflect the general trend that GA traffic has weathered the pandemic better than commercial, not all GA airports have such pronounced seasonal patterns, and not all GA airports have seen their traffic return as robustly.

Figure 4 shows itinerant GA operations at Fort Lauderdale Executive Airport, Florida (FXE). Looking at operations in 2019, we see that GA traffic at FXE does not show the same seasonal variation as Naples, its counterpart on the Gulf coast. Because of this, the impact of the pandemic is more clearly visible. Traffic in April 2020 was down over 40% compared to April 2019. However, the chart also shows that the recovery was just as quick, with operations actually above previous levels by June of 2020.

Figure 5, on the other hand, shows itinerant GA operations at Teterboro, New Jersey (TEB), which serves New York City and its surrounding communities. While we can see some seasonality in Teterboro’s historical data, the real story here is that traffic is still about half of what it was last year. We can speculate that this may be due to factors such as local travel restrictions, the evolving demand for business travel, or perhaps that some New York City residents have been residing outside of the area during the pandemic. In any case, the data for Teterboro shows that not all GA airports are back to their previous levels of activity.

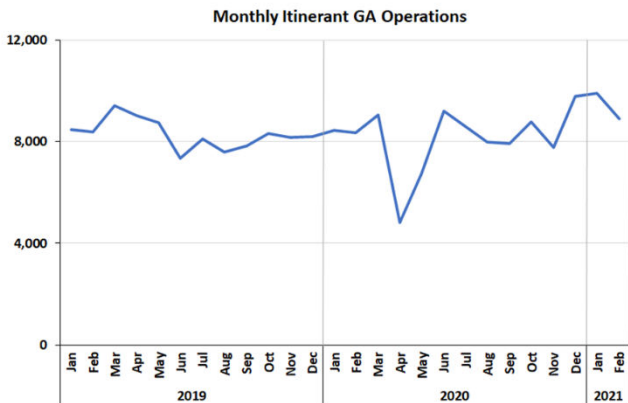


Figure 4. Fort Lauderdale Executive, FL

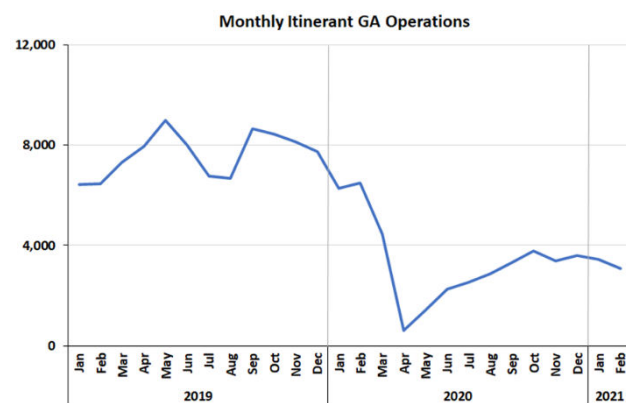


Figure 5. Teterboro, NJ

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