

Contents

<i>Chapter</i>	<i>Page</i>
I. Overview O	3
Regulation and Service to Small Communities	4
U.S. Commuter Aircraft Industry Competitiveness	5
Further Issues	6
2. Evolution of the Commuter Airline Industry	11
Government Regulation and Industry Structure	11
Trunk Airlines	11
Local Service Airlines	12
Commuter Airlines	12
Technological Evolution	13
The Jet Era	14
Local Service Subsidies and Route-Strengthening	14
Commuter Airline Growth and Fleet	17
Market Opportunities	17
Commuter Aircraft and Fleet Mix	19
Deregulation and Commuter Evolution	20
Provisions for Small Communities	20
Future Role of Commuters	21
3. Air Service Trends	25
Introduction	25
The Role of Commuter Airlines	25
The Impact of Deregulation on Low-Density Air Service	26
Changes in Air Service Patterns	27
State and Regional Air Service Studies	29
EAS, Commuters, and Market Development	31
The EAS Program	31
Reactions to the EAS Program	32
4. Technological Needs and Opportunities	37
Introduction	37
The Commuter Aircraft Fleet	38
Fleet Mix	38
Why Foreign Aircraft?	39
Future Markets, Aircraft and Competitiveness	40
Market Projections	40
Aircraft Exports and U.S. Competitiveness	41
The Small Transport Aircraft Technology Program	42
Proposed NASA Technology-Readiness Program	44

Contents—continued

LIST OF TABLES

<i>Table No.</i>	<i>Page</i>
1. Points Served by Certificated Carriers: 48 Contiguous States	15
2. Section 406 Subsidy Payments to Carriers, 1954-82	16
3. Changes in Aircraft Departures and Available Seats by Market Size, 1977-80	28
4. Changes in Frequencies by Market Size, 1977-80	28
5. Commuter Aircraft in Joint Passenger/Cargo Operations, 1980	38
6. Turboprop Commuter Aircraft Under Development	42

LIST OF FIGURES

<i>Figure No.</i>	<i>Page</i>
I. Relative Direct Operating Costs From the DC-3 to the DC-10	13
2. Local Service Airlines Aircraft Fleet Mix	16
3. Commuter Passengers, Cargo, and Mail, 1970-80	18
4. Commuter Airline Fleet by Aircraft Size	19
5. Air Service Changes, October 1977 v. October 1979	29
6. Air Service Changes, October 1977 v. October 1980	30
7. STAT Advanced-Technology Commuter Aircraft Configurations	43