

NO PLANE NO GAIN

The Real World of Business Aviation: 2018 Survey of Companies Using General Aviation Aircraft



Executive Summary From a Survey Conducted by the Harris Poll

Commissioned by:
The National Business Aviation Association and
The General Aviation Manufacturers Association



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FINDINGS

Here are key findings from the 2018 study. The findings represent a statistically valid representation of the use of business aircraft by NBAA's 11,000-plus member companies today.

- **Most companies using business aviation are small companies** – In the survey, 57 percent of pilots say their companies using business aviation employed 500 or fewer workers.
- **The majority of companies using business aviation have only one airplane** – In the survey, 62 percent of pilots say their companies operate just one turbine-powered aircraft.
- **Many business aircraft are largely flown to towns with little or no airline service** – In the survey, pilots say, on average, that more than 42.5 percent of their destinations are airports with infrequent or no scheduled airline service. These pilots also noted that, on average, 31.5 percent of the flights they conducted in the last year were to destinations that have never had commercial air service.
- **A primary driver of business aircraft use is scheduling flexibility** – The passengers surveyed say, on average, that 51.6 percent of the business aircraft flights they take enable them to keep business schedules that could not be met efficiently using the scheduled airlines, or other modes of transportation.
- **Business aviation missions often involve multiple destinations** – Pilots say, on average, that 42.2 percent of their trips involve stopping at more than one location.
- **Companies use both business aircraft and the airlines as appropriate** – According to the passengers surveyed, on average, 65.3 percent of their flights are on business aircraft, while 29.1 percent of their trips are on airliners. The decision on which business tool to use – business aircraft or airliner – appears to be made on a mission-by-mission basis.
- **Top management is on board business aircraft just over half the time** – The passengers surveyed said that high-ranking executives (e.g., CEO, COO, CFO, Board Directors) are traveling with them only 56 percent of the time. A significant portion of business aircraft passengers include technical specialists, middle managers and customers.
- **Employees use their time on company aircraft to be highly effective and productive** – Passengers on business aircraft spend, on average, nearly two-thirds of their time (63 percent) aloft engaged in work, including 38 percent of the time meeting with colleagues or customers. When they fly commercially, these same passengers, on average, work only 42 percent of the time. Two-thirds (66 percent) of these passengers say they are more productive, on business aircraft flights than when they are in the office, while nearly 86 percent say they are less productive on commercial flights, compared to when working in their offices.
- **Many business airplanes are used to fly humanitarian missions** – During the past year, 38 percent of pilots say they have flown humanitarian missions. The pilots reported flying an average of 3 humanitarian missions per year.
- **It is increasingly clear that companies are now operating in a global marketplace, as more companies using business aircraft are flying internationally** – About 23 percent of pilots and 24 percent of passengers say their percentage of overseas flights aboard business aircraft has increased during the past five years.
- **More than half of the turbine-powered business airplanes flying today are small jets, turboprops or other small aircraft** – These smaller aircraft make up 55.2% of the fleets owned and operated by NBAA members, including 16.7% small jets and 18.7% turboprops.



SUMMARY

In summary, business aviation continues to provide the same benefits that have traditionally been associated with its use, including – but not limited to – greater efficiency and flexibility in travel scheduling; heightened employee productivity while en route; access from secondary cities to larger metropolitan areas for exploring business opportunities; and a means of business transport to augment airline travel, as needed.

METHODOLOGY

The findings of the survey are based on interviews with both business aircraft pilots and passengers. These interviews were conducted online by The Harris Poll in two phases. The first phase was conducted online between Aug. 30 and Sept. 21, 2018, among 202 chief pilots, pilots, flight department managers and directors of flight operations or aviation (referred to in this report as “pilots”). Figures for the number of aircraft per company were weighted where necessary to bring them into line with their actual proportions in the business aircraft population.

The second phase consisted of 276 interviews among passengers on business aircraft (referred to in report as “passengers”) conducted between Aug. 30 and Sept. 21, 2018. The passenger completed the survey online. Passenger data were not weighted.

About The Harris Poll

With comprehensive experience and precise technique in public opinion polling, along with a proven track record of uncovering consumers’ motivations and behaviors, The Harris Poll has gained strong brand recognition around the world. Visit: theharrispoll.com

About NBAA

Founded in 1947 and based in Washington, DC, the National Business Aviation Association (NBAA) is the leading organization for companies that rely on general aviation aircraft to help make their businesses more efficient, productive and successful. The association represents more than 10,000 companies and provides more than 100 products and services to the business aviation community, including the NBAA Business Aviation Convention & Exhibition, the world’s largest civil aviation trade show. Learn more about NBAA at www.nbaa.org.

About GAMA

The General Aviation Manufacturers Association (GAMA) exists to foster and advance the general welfare, safety, interests and activities of the global business and general aviation industry. This includes promoting a better understanding of general aviation manufacturing, maintenance, repair, and overhaul and the important role these industry segments play in economic growth and opportunity, and in serving the critical transportation needs of communities, companies and individuals worldwide. GAMA currently represents over 125 companies spanning 15 countries and five continents. Learn more at gama.aero.



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