



Of the companies using general aviation for business in the U.S., 85 percent are small and mid-size businesses.

BUSINESS AVIATION NATIONAL ASSET – VITAL ISSUES

From creating growth opportunities and global connectivity for America's small towns and rural areas to supporting the nation's productivity, business aviation is an important economic engine, creating jobs and investments, while contributing to the safest and most efficient aviation system in the world. Business aviation is a vital part of the nation's economy and transportation system.

UNDERSTANDING BUSINESS AVIATION

- » The U.S. aviation system is fully integrated, and each segment is critical to the success, strength and growth of the entire infrastructure. The system is made up of three segments:
 - » Scheduled operations, including passenger airlines
 - » Military
 - » General aviation
- » General aviation (GA) contributes more than \$219 billion to the nation's annual economic output, and directly or indirectly employs more than a million people.
- » GA includes diverse operations, with business uses that range from agriculture, law enforcement, fire and medevac services, to varied government, educational, nonprofit and business organizations.
- » The vast majority of these GA operators use small aircraft that seat no more than eight people.
- » Business aviation is the use of a GA aircraft for a business purpose. The business aviation fleet is dominated by pistons and turboprops, with over 80 percent of the 17,000 registered business aircraft in the U.S. having cabins about the size of an SUV, and flying on average less than 1,000 miles.

There are over 5,000 public-use airports in the U.S. – of which approximately 500 have commercial airline service – making GA a critical lifeline for thousands of communities.



A VITAL LIFELINE FOR MAIN STREET

In small towns and rural areas across America, business aviation is an essential tool that enables businesses to thrive, grow and create jobs in their hometowns. That's because in many instances, there are no other transportation options that meet their needs.

- » Many small and mid-size businesses are located in areas without scheduled airline service.
- » Many businesses of all sizes require in-person travel for operations such as sales, technical support and other types of customer service.
- » Such trips may call for multiple stops in a short period of time or travel to remote locations. Often the distances are too long to drive and commercial airline service is not available.
- » Eighty-six percent of business aviation flights carry marketing and sales personnel, technical experts, other company representatives and customers – not top company executives.

A HELPING HAND IN TIMES OF CRISIS

The business aviation community is not only an economic lifeline for thousands of our nation's communities, but in times of crisis, business aviation helps deliver relief to neighbors and communities. For example:

- » In the days and weeks following Hurricane Katrina, hundreds of thousands of pounds of supplies were transported into small airports throughout the Gulf Coast region aboard business aircraft, which also were used to transport victims out of harm's way.
- » In the aftermath of Superstorm Sandy in 2012, business aviation operators donated their aircraft and time to fly food, medical supplies, water and other necessities to the New York and New Jersey communities that were hardest hit.
- » Whether confronting floods, fires or other natural disasters, general aviation helps assess damage, rescue those affected and carry in supplies through a network of small, often remote airports.

- » Business aviation operators are also dedicated to helping provide lifesaving flight operations and contributing their services to the communities in which they live and work.
- » Operations like Corporate Angel Network arrange free air transportation for cancer patients traveling to treatment centers using empty seats aboard business aircraft. The group has arranged more than 45,000 lifesaving flights since its founding in 1981.
- » A recent survey conducted by Harris Poll found that in 2015, 23 percent of business aircraft pilots said they had flown humanitarian missions and typically fly 3.5 humanitarian missions per year.
- » Veterans Airlift Command uses business aircraft and unused hours of fractional aircraft ownership programs to provide free flights for medical and other purposes for wounded service members, veterans and their families.

BUSINESS AVIATION SNAPSHOT: SANDERSON FARMS



A CRITICAL BUSINESS TOOL

Running a company of over 12,000 employees isn't easy – especially when they're spread out over 11 towns from Texas to North Carolina. That's why Sanderson Farms relies on its fleet of six airplanes and 20 pilots to carry employees and customers between the company's 21 chicken plants, hatcheries and feed mills, none of which are located near an airline hub. General aviation makes the company's busy travel schedule – over 3,600 hours each year – as fluid and productive as possible.

The aircraft haven't just enabled Sanderson employees to be more efficient, they've also given the company the ability to be more responsive to customers and maintain its competitive edge as it has grown. "There's no way our people could operate as efficiently as they do without the aircraft," says Robin Robinson, Sanderson's director of organizational development. "The flight department's not an expense; it's an investment that gives a return many times over."

Veterans Airlift finds volunteers in the business aviation community to fly missions on request and contribute the full cost of the aircraft and fuel for the missions flown.

A NATIONAL ASSET

General aviation not only supports vital air transportation services nationwide but also powers an economic engine that generates millions of dollars in investments and jobs for people in thousands of American communities every year.

- » Most of the GA aircraft flying in the world are manufactured in the U.S., contributing to the nation's manufacturing and employment base, and adding significantly to our balance of trade.
- » GA manufacturing provides good, high-wage manufacturing jobs across the U.S.

PRIORITY ISSUES

Modernize the Aviation System

America's aviation system is a significant national asset to our transportation and economic infrastructure, and its modernization is critical to our nation's future. The business aviation community supports proposals to:

- » Build a system that accommodates all users – scheduled, military and GA – efficiently and effectively.
- » Strengthen the system as an economic engine, allowing businesses in America's small towns to utilize aviation to grow and prosper.

When capacity becomes constrained, general aviation is usually the first segment to be squeezed out, so the business aviation community strongly advocates modernizing the system to one based on satellite technology rather than today's ground-based navigation system and expanding capacity.

- » General aviation operations at the nation's 10 busiest airports account for only 4 percent of total activity.
- » If additional resources are needed from GA for modernization, this effort can most effectively be funded through the proven mechanism of fuel taxes. The government and the aviation community must continue to work together to build a stronger aviation system, so that it remains the world's safest, largest and most efficient system.

Continue Enhancing Security

In the years since the terrorist attacks of Sept. 11, 2001, business aviation and the rest of the general aviation community have led the way in working with federal government officials to harden the industry from terrorist threats. As security policies and procedures are considered in the years to come, business aviation will continue to be committed to playing a central role in the protection of our system. The

following are industry's guiding principles on the development of security policies:

- » As the TSA reviews security proposals, it is critical that those mandates recognize the significant differences between commercial aviation and general aviation, and not simply try to impose commercial regulations onto general aviation.
- » Any new mandates must maintain the vital balance between enhancing aviation security and preserving the mobility and flexibility that are necessary for American workers and our economy.

General aviation operations at the nation's 10 busiest airports account for only 4 percent of total activity.

Ensure the Industry's Economic Viability

As the economic downturn has affected American communities in every corner of the nation, business aviation has been impacted across the board. The impact has been felt in every corner of the industry – from layoffs at business airplane manufacturing companies, to lost flights and revenues at

BUSINESS AVIATION SNAPSHOT: PREMIER BONE AND JOINT



A PRODUCTIVITY AND EFFICIENCY TOOL

With distances of more than 250 miles between its 11 orthopedic clinics, Premier Bone & Joint Centers relies on its fleet of four King Airs to treat patients across Wyoming. "I don't see how we could operate 11 clinics without airplanes," says Dr. Lawrence Jenkins.

Wyoming's rural nature and often brutal winter conditions make business aviation an essential part of why Premier is able to treat nearly 75 percent of the state's residents. Four full-time pilots fly doctors from Premier's headquarters in Laramie, WY, to satellite clinics across the state. A typical day can see doctors flying from Laramie to Casper to Gillette and back – a schedule only possible through general aviation. "We couldn't do this without the airplanes," says Dr. Mark McKenna. "They're vital to the business."

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"Business aviation has long led the way in promoting advances aimed at reducing the industry's environmental footprint"

— ED BOLEN
NBAA President and CEO

regional airports, to reduced business at fixed base operators (FBOs), to decreased demand for charter services, to companies having to delay doing business due to high costs.

During the worst part of the recession, from late 2008 through mid-2010, business aviation flight activity dropped by as much as 35 to 40 percent in some locations. During the same period, sales of every type of new aircraft fell off precipitously, leading manufacturers to shed thousands of workers. While signs of a budding recovery for business aviation are in view, the industry is far from a full rebound. For example, shipments of new general aviation airplanes were relatively flat last year. Year-on-year transaction activity for used business aircraft has remained largely unchanged, and average asking prices in many parts of the market continue to face downward pressure. And, although flight hours have largely stabilized, they have not returned to pre-recession levels.

In confronting the volatility of the economy, business aviation will work with the rest of the aviation community and the government to find long-term solutions.

Build on Environmental Successes

Although the industry represents a tiny fraction of transportation emissions, business aviation is focused on promoting mobility while minimizing the industry's environmental footprint. For decades, the general aviation community has led in reducing emissions through airframe and engine advances and through the development of operational efficiencies:

- » The industry continues to reduce emissions through new technologies, which means that today's aircraft engines are 50 percent cleaner, quieter and more fuel efficient than when they were introduced.
- » Twenty years ago, the industry developed winglets for general aviation aircraft, which optimize aircraft performance and flight range, and contribute to a more efficient fuel burn, thereby reducing emissions. This equipment is now in place on an increasing number of general aviation and commercial aircraft.

» Operational improvements supported by general aviation have resulted in system efficiencies that help the environment. Within the past decade, NBAA members began equipping aircraft with cockpit technology allowing for reduced vertical separation minimums, or RVSM, which effectively doubled the system's airspace capacity.

» General aviation was at the forefront of the development of automatic dependent surveillance-broadcast (ADS-B), the cornerstone for aviation system modernization and capacity expansion, which allows for optimal efficiencies in routing, approaches and other uses of the aviation system, which reduces fuel burn and emissions.

» NBAA Members supported the development of precision approach procedures, which likewise produce efficiencies by enabling operators to custom-tailor flight paths, minimizing fuel burn and noise, while preserving operational safety.

The business aviation community also believes that an effective way to reduce emissions is to continue the work already done to implement a more efficient Next Generation aviation system, or "NextGen," based on satellite technology. The Government Accountability Office has cited FAA data showing that "the full implementation of NextGen could reduce greenhouse gas emissions from aircraft by up to 12 percent by 2025."

To meet both our nation's economic needs and emergency requirements, the U.S. needs a diversity of aviation operators, operations and a wide range of airports in all 50 states. NBAA members across the country stand ready to work in partnership with the government to strengthen this critical national asset – driving economic growth, jobs and investments throughout the United States, all while expanding and modernizing the safest and most efficient aviation system in the world.
