

**NO PLANE NO GAIN**

# The Real World of Business Aviation: 2015 Survey of Companies Using General Aviation Aircraft



Executive Summary From a Survey Conducted by Harris Poll

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



## The Real World of Business Aviation: A 2015 Survey of Companies Using General Aviation Aircraft

### NBAA Study Executive Summary

#### INTRODUCTION

For five decades, studies conducted by Harris Poll, a leading global market research firm, have reflected respondents' opinions on a wide range of topics, from sports to health, to politics and business.

This new study, *The Real World of Business Aviation: A 2015 Survey of Companies Using General Aviation Aircraft*, was conducted by Harris Poll on behalf of the National Business Aviation Association (NBAA) and the General Aviation Manufacturers Association (GAMA) from Oct. 26 through Nov. 6, 2015.

Its goal was to compare current business aircraft use to the findings of two previous, similar studies, conducted in 1997 and 2009, respectively. Like its predecessors, the 2015 study was designed to determine the specific ways turbine-powered business aircraft are being utilized in support of companies' business objectives. Specifically, this survey sought to answer a host of questions, including:

- What types of companies are operating business aircraft?
- What types of business aircraft are being flown?
- Who flies on business aircraft?
- How do passengers spend their time aboard the aircraft?
- What destinations are business aircraft being flown to?
- What types of non-business flying (i.e., humanitarian missions) are being conducted using business aircraft?

After an exhaustive survey of two groups of people – business aircraft pilots and business aircraft passengers – it is clear that the key elements of business aircraft use remain essentially unchanged from the findings of the two previous surveys.

#### FINDINGS

Here are 10 key findings from the 2015 study. The findings represent a statistically valid representation of the use of business aircraft by NBAA's 10,516 member companies today.

- **Most companies using business aviation are small companies** – In the survey, 55 percent of pilots say their companies using business aviation employed 500 or fewer workers.
- **Most companies using business aviation have only one airplane** – In the survey, 74 percent of pilots say these companies operate just one turbine-powered aircraft.
- **More than half of the turbine-powered business airplanes flying today are turboprops or smaller jets** – These two aircraft types account for the majority of the business aviation fleet, with turboprops making up 34.9 percent of aircraft, and smaller jets making up 41.2 percent of 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 41.5 percent of their destinations are airports with infrequent or no scheduled airline service. These pilots also noted that, on average, 34 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 52.4 percent of the business aircraft flights they take enable them to keep business schedules that could not be met efficiently using the scheduled airlines.



- **Business aviation missions often involve multiple destinations** – Pilots say, on average, that 38.6 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, 53.4 percent of their flights are on business aircraft, while 36 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 less than half the time** – The passengers surveyed said that high-ranking executives (e.g., CEO, COO, CFO, Board Directors) are traveling with them only 48 percent of the time.
- **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 (65 percent) aloft engaged in work, including 40 percent of the time meeting with colleagues or customers. When they fly commercially, these same passengers, on average, work only 43.5 percent of the time. Two-thirds (67 percent) of these passengers say they are as productive, or even more productive, on business aircraft flights than when they are in the office, while nearly 87 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, 23 percent of pilots say they have flown humanitarian missions. The pilots reported flying an average of 3.5 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 21 percent of pilots and 20 percent of passengers say their percentage of overseas flights aboard business aircraft has increased during the past five years.

## 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 in two phases. The first phase was conducted online between Oct. 26 and Nov. 5, 2015, among 323 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 and size of aircraft were weighted where necessary to bring them into line with their actual proportions in the business aircraft population.

The second phase consisted of 132 interviews among passengers on business aircraft (referred to in report as “passengers”) conducted between Oct. 26 and Nov. 6, 2015. The passenger completed the survey online. Passenger data were not weighted.

### About Harris Poll

With comprehensive experience and precise technique in public opinion polling, along with a proven track record of uncovering consumers’ motivations and behaviors, Harris Poll has gained strong brand recognition around the world. Contact [ConsumerInsightsNAInfo@nielsen.com](mailto:ConsumerInsightsNAInfo@nielsen.com) for more information.

### 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](http://www.nbaa.org).

### About GAMA

The General Aviation Manufacturers Association (GAMA) is an international trade association representing over 80 of the world’s leading manufacturers of general aviation airplanes and rotorcraft, engines, avionics, components and related services. GAMA’s members also operate repair stations, fixed based operations, pilot and maintenance training facilities and they manage fleets of aircraft. Learn more at [www.gama.aero](http://www.gama.aero).