



# NBAA Pilot-Passenger Study 2018

Tuesday, October 16th | 1 – 2 P.M.

Presented by: David Krane, The Harris Poll

## Method

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.

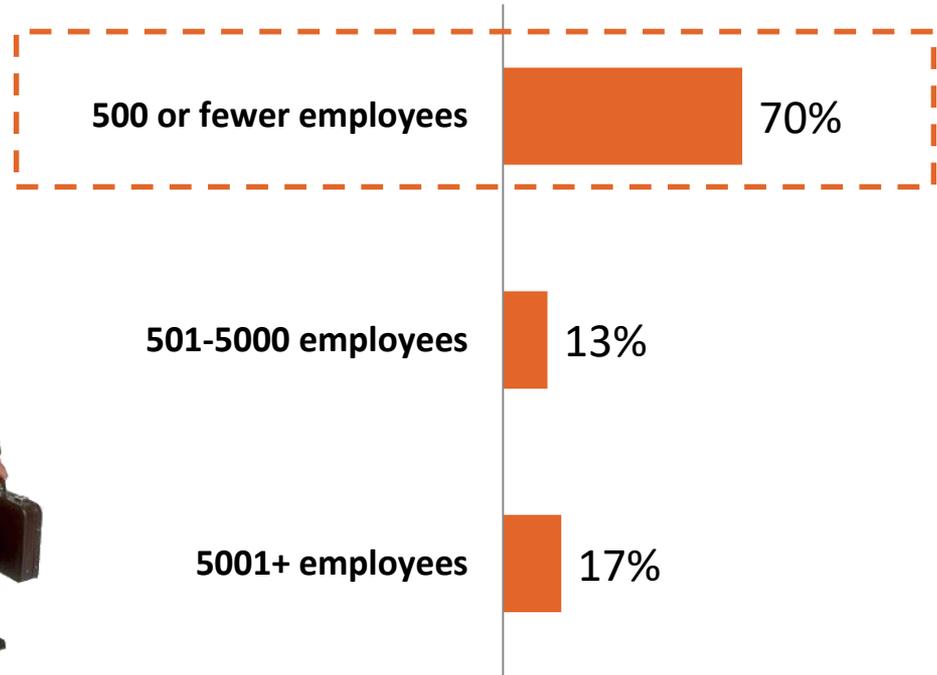
The first phase was conducted online between Aug. 30 and Sept. 21, 2018, among 202 chief pilots, pilots, flight department managers and directors of flight operations or aviation (referred to in this report as “pilots”). Figures for the number of aircraft per company were weighted where necessary to 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. Passenger data were not weighted.

# Most companies using business aviation are small companies

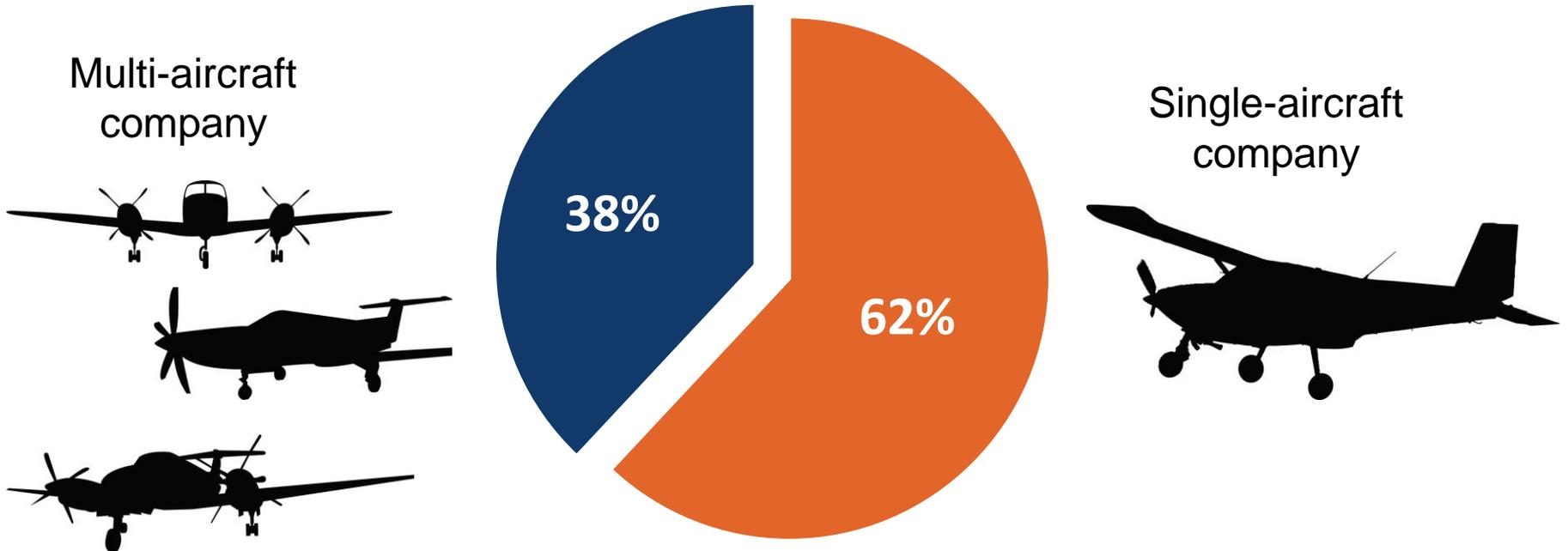


Number of employees



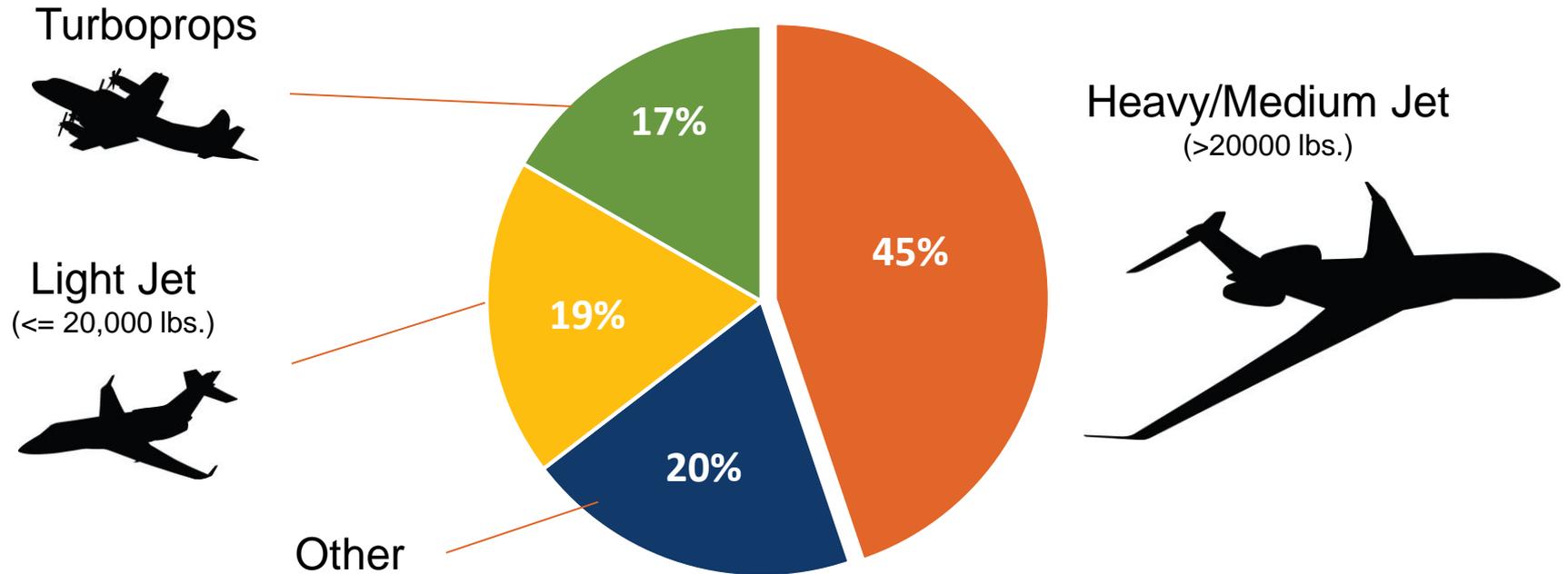
# The majority of companies using business aviation have only one aircraft

Number of Aircraft Own/Operated



# More than half of the turbine-powered business airplanes flying today are smaller jets, turboprops, or small aircraft

Type of Aircraft Owned/Operated

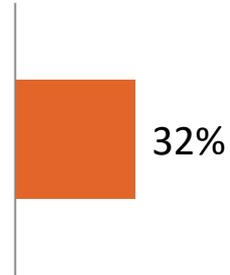


# Many business aircraft are largely flown to towns with little or no airline service



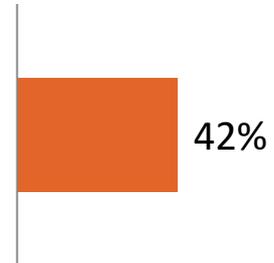
**In past 6 months, flown to an airport that ...**

Never had scheduled airline service  
(mean %)



**Type of airport flown to...**

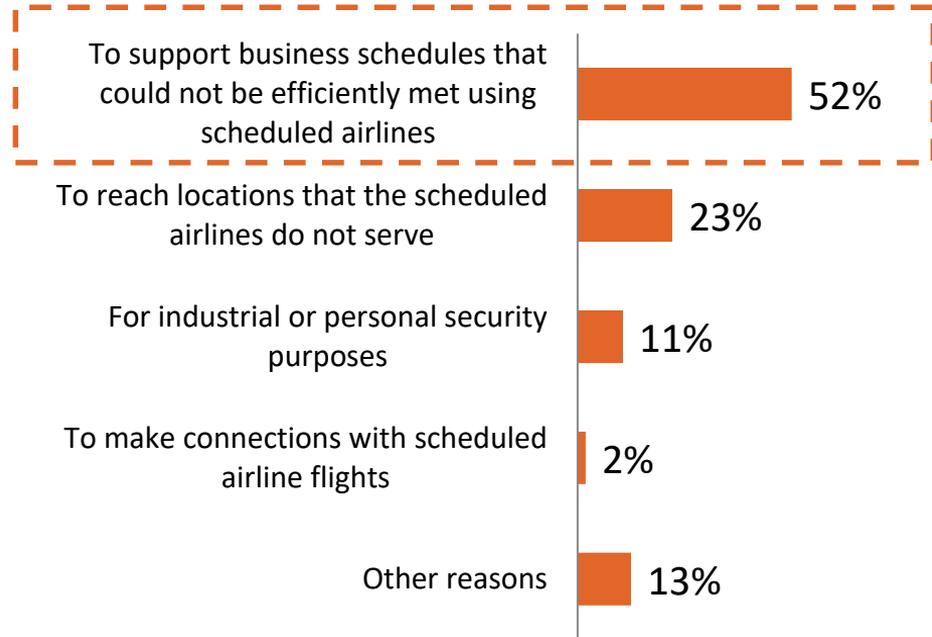
An airport with infrequent or no scheduled airline service (i.e., no more than a total of 8 flights per day, including all outgoing and incoming airline or commuter flights)



# A main reason for business aircraft use is scheduling flexibility

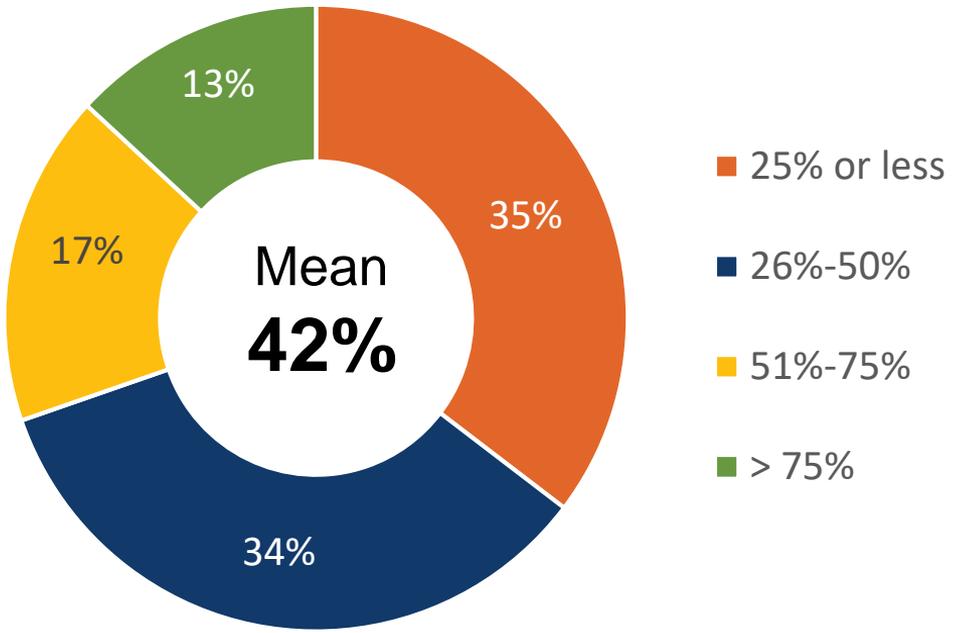


## Reasons for Using Business Aircraft



# Business aviation missions often involve multiple destinations

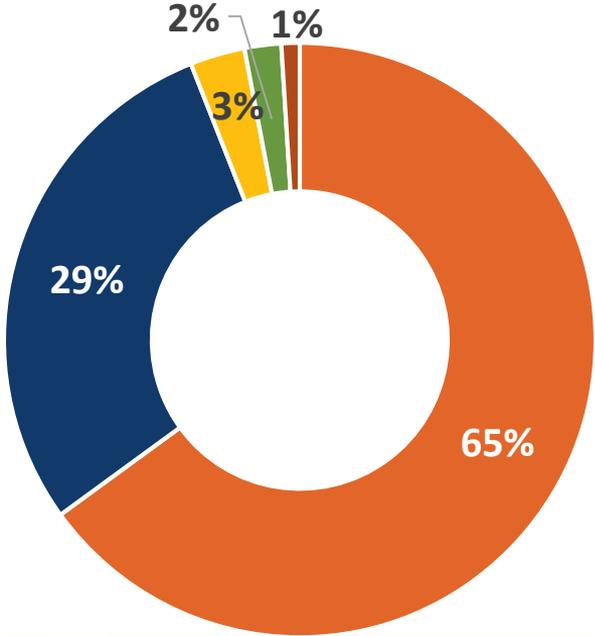
Percent of Multi-Leg Flights



# Companies use both business aircraft and the airlines as appropriate



Type of Aircraft Used



- Company-operated aircraft
- Commercial airlines
- Company-chartered aircraft
- Fractional share/Jet card aircraft
- A combination of these

# Employees use their time on company aircraft to be highly effective and productive

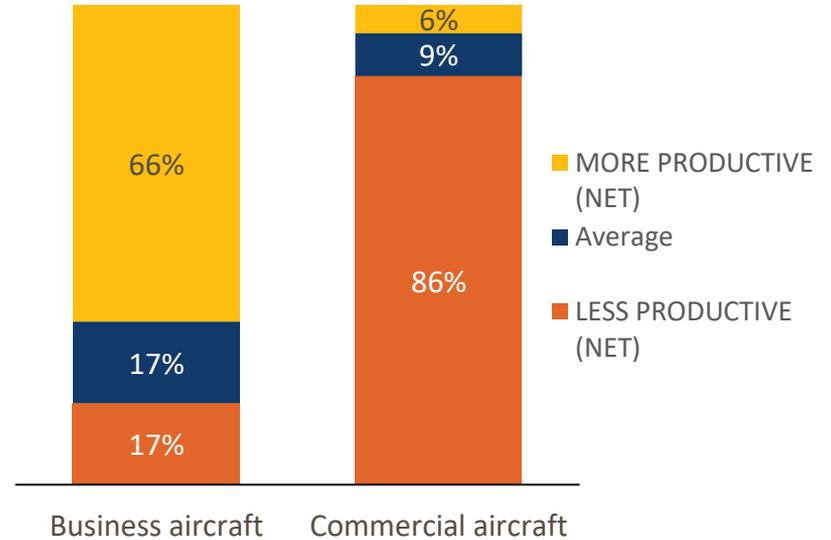
**Business Aircraft Activities**  
**Work-related (Net)**  
**63%**

**vs.**

**Commercial Aircraft Activities**  
**Work-related (Net)**  
**42%**



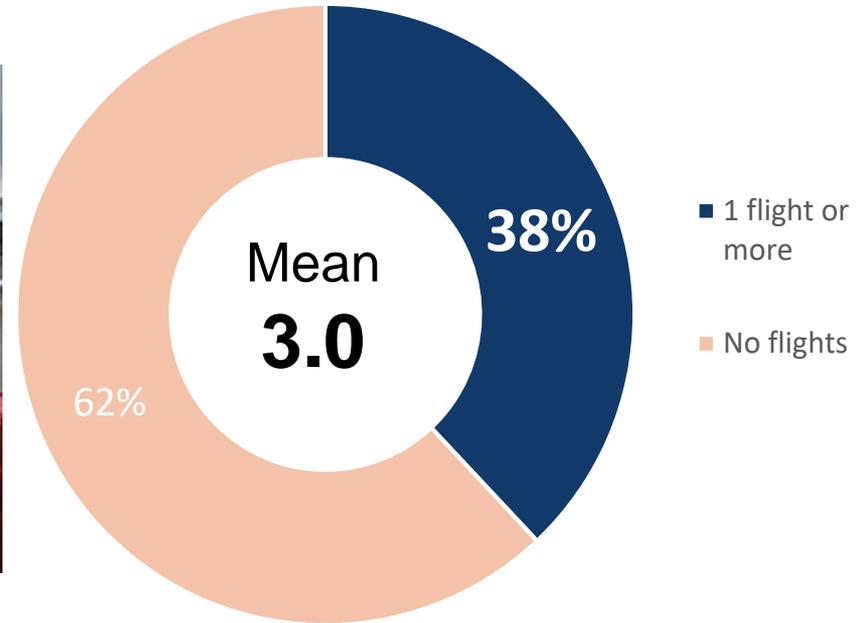
## Productivity on Aircraft vs. Office



# Many business airplanes are used to fly humanitarian missions

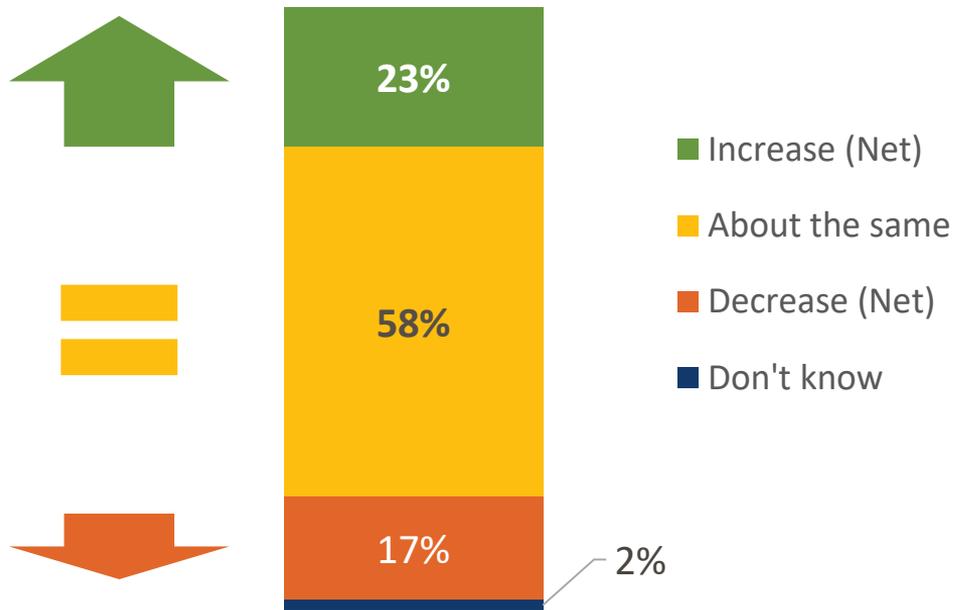


Number of Times Flown  
Humanitarian Missions

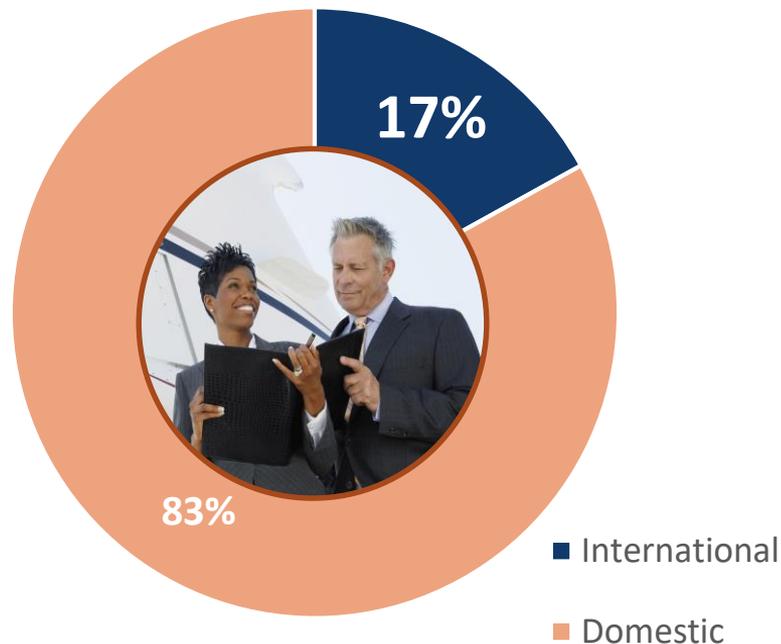


# Business aircraft are now operating in a global marketplace, flying more internationally

### Change in International Flights in Past 5 years



### Current % of International Flights (mean)





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