



# RESEARCH 2017

## How people view business aviation

The awareness opportunity



THE JET  
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2014 GULFSTREAM G650ER  
SERIAL NUMBER 6087 – REGISTRATION N711SW



2012 GULFSTREAM G650ER  
SERIAL NUMBER 6007 – REGISTRATION N288WR



2014 GULFSTREAM G650  
SERIAL NUMBER 6075 – REGISTRATION G-REFO



2007 GULFSTREAM G500  
SERIAL NUMBER 5148 – REGISTRATION VP-BCC



2007 GULFSTREAM G450  
SERIAL NUMBER 4085 – REGISTRATION N88WR



2004 BOMBARDIER CHALLENGER 300  
SERIAL NUMBER 20014 – REGISTRATION M-OZZA



1996 DASSAULT FALCON 900EX  
SERIAL NUMBER 001 – REGISTRATION N900HG



2012 EMBRAER LEGACY 650  
SERIAL NUMBER 14501155 – REGISTRATION B-3098



2011 EMBRAER LEGACY 650  
SERIAL NUMBER 14501127 – REGISTRATION G-SYNA



2017 EMBRAER LEGACY 500  
SERIAL NUMBER 55000066 – REGISTRATION N510RB



2006 CESSNA CITATION SOVEREIGN  
SERIAL NUMBER 680-0079 – REGISTRATION D-CHEC



## 1.0

# EXECUTIVE SUMMARY

Sometimes quantitative data matches your qualitative life experience.

Unless you spend most of your time in a rarefied world, when you meet a stranger it probably takes a few attempts to explain exactly what you do. Most people do not know much about private aircraft or corporate jets. And it is hard for people to have a view on something that they know little about.

The majority of people working in business aviation believe their industry has a perception problem: that public does not like business jets. In fact, the industry has an awareness opportunity.

It is an opportunity to shape the views of people to support the industry and - in a few cases - create new customers.

Key findings from surveys involving almost than 13,000 individuals include:

- Business aviation does not have a perception problem. It has an awareness problem.
- People inside business aviation feel that the public is negative towards the industry
- But most members of the public actually know very little about business aviation. However, awareness is growing
- In 2015 some 59.53% of Americans could not name a business jet company. In 2017 this had fallen to 47.1%
- There are signs that marketing campaigns from new entrants are educating people about the industry.
- The number of Americans expecting to fly on a private jet has risen from 20.1% in 2016 to 22% in 2017.
- Some 17.35% of Australians believe they will fly on a business aircraft, compared to 14.7% of Germans, 14.5% of British people and 11.6% of people in Japan



## 2.0

# ABOUT THE JET BUSINESS

The world's first corporate aviation showroom.

The Jet Business is the world's first and only street-level corporate aviation showroom for the marketing and acquisition of corporate jet aircraft. We represent our clients throughout the aircraft transaction process, offering the most up to date product information, global market data, extensive industry relationships and unrivalled world-class expertise.

The Jet Business provides global 24 hour access to a network of the most qualified team of staff sourced to suit specific requirements including pilots, lawyers,

flight attendants, interior designers and aircraft management. We have simplified the corporate jet sales experience and set the definitive standard in aviation luxury, hospitality and information technology.

We understand our clients and appreciate how important their time is. Our company is designed to be completely flexible, available across every time zone and meeting at any destination across the globe. We are dedicated to providing the most current and unbiased market advice, a trusted guide to what is available in the market.

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3.0

# THE MAN ON THE CLAPHAM OMNIBUS

For more than 100 years, English judges have relied on “the man on the Clapham omnibus.”

This hypothetical person is used to decide if a party has reacted reasonably and to describe a rational, well-educated person. Other common law jurisdictions have adapted the phrase. In Melbourne, Australia they have “the man on the Bourke Street Tram”. In Hong Kong “the man on the Shauiwan Tram.”

In 2015 we decided to see how “the man on the Clapham omnibus” viewed business aviation.

Rather than hanging around on buses or trams, we used modern Google Surveys internet polling. In total we have asked some 13,000 people what they think about business aviation.

More than 9,000 of these were Americans. With the US the world’s biggest business aviation market.

Most of these surveys were conducted by people prepared to answer a question in

return for accessing premium websites. Sample sizes varied between 500 and 5000 – all of these were statistically significant.

The good news is that “the woman on the Charlotte Greyhound” views business aviation positively. Although she may not know much about the industry. Most Americans believe that businesses are the main users of corporate jets and one in five think they will fly on a business jet in the next 10 years. “The man on the Osaka bullet train” is less optimistic.

Statistically, few of these people are likely to become business aviation customers.

But how the public views business aviation matters. Some of these people could become customers. It is also easier for voters to influence lawmakers now than at any time. Lawmakers listen to voters when they call, write or tweet. No industry is an island.

At the moment, the public is fairly supportive of corporate jets. We all need to try and make sure that men and women on buses and trams keep feeling this way. And help them discover the advantages of business aviation.

## 4.0

# NO ONE LIKES US BUT WE CARE

We all pay far more interest to things that are important to us. So it is natural that people inside an industry remember attacks on it. Few US business aviation professionals have forgotten the questioning of car manufacturers in Washington in 2008 for example.

But people outside the industry are more forgiving.

The consensus inside business aviation is that the general public is negative towards business aviation.

- 52% of attendees at Corporate Jet Investor Miami in October 2016 said that the public consider "business jets to be evil".
- 64% of attendees at Corporate Jet Investor London in February 2017 said that business aviation has an image problem.
- 87% of attendees at Corporate Jet Investor Asia in June 2017 said that business aviation has an image problem.

We asked industry insiders which statement members of the US public would use to describe business jets.

The options were:

- Used by corporate fat cats/the very rich
- A sign of success – I want one
- The best way to travel
- The ultimate business tool
- Amazing machines/technology
- Bad for the environment
- None of the above

Some 75% of respondents believed that the public would go for "Used by corporate fat cats/the very rich", with 25% going for "I want one."

The US public are actually a lot more enthusiastic.

In a poll of 636 Americans in 2015, they said:

- |                                      |       |
|--------------------------------------|-------|
| • Corporate fat cats/the very rich   | 20.8% |
| • None of the above/don't know       | 18%   |
| • <i>A sign of success</i>           | 14.6% |
| • <i>The best way to travel</i>      | 14.2% |
| • <i>The ultimate business tool</i>  | 12.9% |
| • <i>Amazing machines/technology</i> | 11%   |
| • Bad for the environment            | 8.5%  |

*Answers in Italics are positive*

*Note responders had the option to choose multiple answers so the total adds up to more than 100%*

Some 67% of Americans view business aviation positively



5.0

## WHO FLIES ON BUSINESS AIRCRAFT?

We also wanted to see how people reacted to a simple picture of a Dassault Falcon Jet flying.

We showed members of the public the picture above and asked them: **Who do you think is flying on this jet?**

The answers were:

- |                           |       |
|---------------------------|-------|
| • CEO/Chairman            | 30.4% |
| • Billionaire/Millionaire | 28.1% |
| • Entrepreneur            | 15.4% |
| • Large company employee  | 14.2% |
| • Rock star/celebrity     | 11.9% |

More than 65% assumed the aircraft was being used for business use (the survey only used a picture and did not use the terms private jet or business jet.)

65% of Americans assume that businesses are the biggest users of corporate jets

# 6.0

# WHO'S WHO IN BUSINESS AVIATION

Asking someone how much they know about something is difficult, so we asked Americans if they could name a company involved in business aviation.

The clear consensus was that most could not.

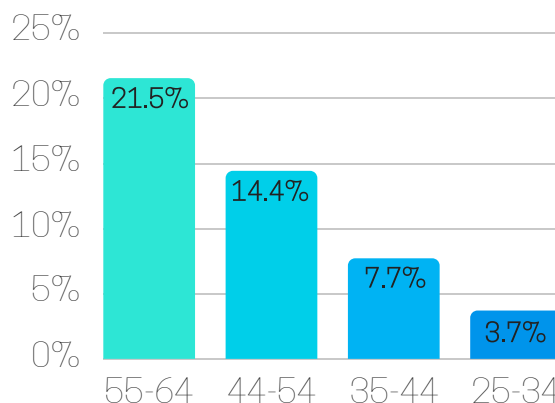
In 2016 some 59% of Americans could not name one company involved in business aviation.

One – predictable – response was that many people chose commercial airlines like Southwest, United and Boeing (we are guessing that they were not referring to Boeing Business Jets).

The top brand was Lear or Learjet. But this was driven by older respondents. More than 22% of people aged between 55 and 65 chose this. Fewer than 5% of 18-34 year olds did.

In 2016 60% of Americans could not name one business aviation brand

AGE OF RESPONDENTS ANSWERING LEAR



Responses from 2016

We repeated the survey in June 2017 – showing how awareness is improving.

## 2016

Brand	%
Invalid answer/ do not know	59.53%
LearJet	16.15%
Boeing	11.86%
Netjets	4.64%
Gulfstream	2.82%
Cessna	2.33%
Donald Trump	0.89%
Bombardier	0.5%
GVI	0.23%
Nike	0.2%
Honda	0.19%
Rolls-Royce	0.13%
Airbus	0.13%
Embraer	0.08%
GV	0.08%

## 2017

Brand	%
Invalid answer/do not know	47.41%
LearJet	18.40%
Boeing	14.83%
Netjets	6.02%
Gulfstream	3.57%
Cessna	3.20%
Trump	1.20%
Bombardier	0.65%
Lockheed	0.60%
G5	0.42%
Falcon	0.37%
Airbus	0.32%
G6	0.32%
Wheels Up	0.32%
GE	0.28%
Hondajet	0.28%
Beechcraft	0.19%
Concorde	0.19%
Duncan Aviation	0.19%
B747	0.14%
Air Force One	0.14%
Cirrus	0.14%
Piper	0.14%
Rolls-Royce	0.14%
Bell	0.09%
Eclipse	0.09%
Aerion	0.05%
Boeing 737	0.05%
Citation	0.05%
Fargo Jet Center	0.05%
Napa Jet Center	0.05%
Royal Jet	0.05%
Surf Air	0.05%
Victor	0.05%

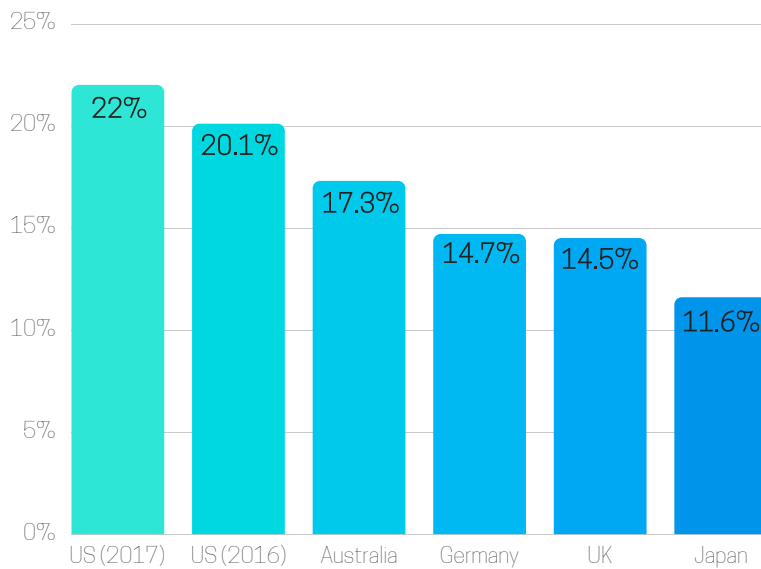
In 2017 more than 47% of Americans are unable to name a business aviation company – although awareness is improving.

This is a significant change. We believe that it has been driven by a combination of new entrants that target customers directly, like Surf Air, Wheels Up and Victor and the election of America's first jet-owning President.

In 2017 more than half of all Americans could name a business aviation company

# 7.0

## DO YOU THINK YOU WILL FLY ON A BUSINESS JET IN THE NEXT 10 YEARS?



One in five of Americans expect to fly on a business aircraft in the next 10 years

# LET'S FLY

There has been a lot of talk about democratising business aviation. And in the US it seems to be working.

In 2016 some 20.1% of Americans thought they would fly on a business jet before 2026. In 2017 it rose to 22%.

This is not actually as high as it may seem. The US Census Bureau suggests that the top 20% of US households would be earning from \$117,000 a year, so a flight in a business aircraft could be achievable within 10 years.

Inhabitants of other countries are less optimistic. Although the survey responses also correlate with each country's business jet fleet.

Country	Population (Million)	People to each business jet
US	321.4	24,000
Australia	23.7	145,000
Germany	81.4	202,500
UK	65.1	325,500
Japan	127	1,270,000

Sources: World Bank, Corporate Jet Investor estimates



## 8.0

# CONCLUSION

Rather than being anti-business aviation, most members of the public do not know anything about the industry. This makes sense. Business aviation is a niche form of transport and most people will never travel in a jet. Many people would struggle to differentiate between a commercial aircraft and a business jet.

Industry professionals vividly remember the auto makers travelling to congress by business jets to ask for bailouts and speeches where President Obama criticised tax breaks for business jet owners – but few outside the industry remember these things.

The good news is that the US public is becoming more aware of the benefits of business aviation. As online brokers and membership organizations market themselves more you can expect this to improve further.

Business aviation marketing is not a zero-sum game. Every company promoting themselves helps sell the advantages.

This is good news for the industry. Other countries are also further behind but should catch up.

The final message is that we as an industry can all do a lot more. The National Business Aviation Association (NBAA)'s No Plane No Gain campaign is a great start but we all need to spread the message. All industries are guilty of talking to each other rather than outsiders.

There are potential customers and potential supporters that do not know enough about this industry.

## 9.0

# APPENDIX

### Methodology

We used our conference polling technology and a survey embedded on [www.corporatejetinvestor.com](http://www.corporatejetinvestor.com) to get industry views.

Our consumer polling used Google Surveys. Google Surveys ask questions across a range of news, reference and entertainment sites. People answer questions in order to gain access to premium content.

The surveys are weighted by age and geographic location.

### List of surveys conducted

In total we polled around 13,000 consumers – with more than 9,000 of these in the US.

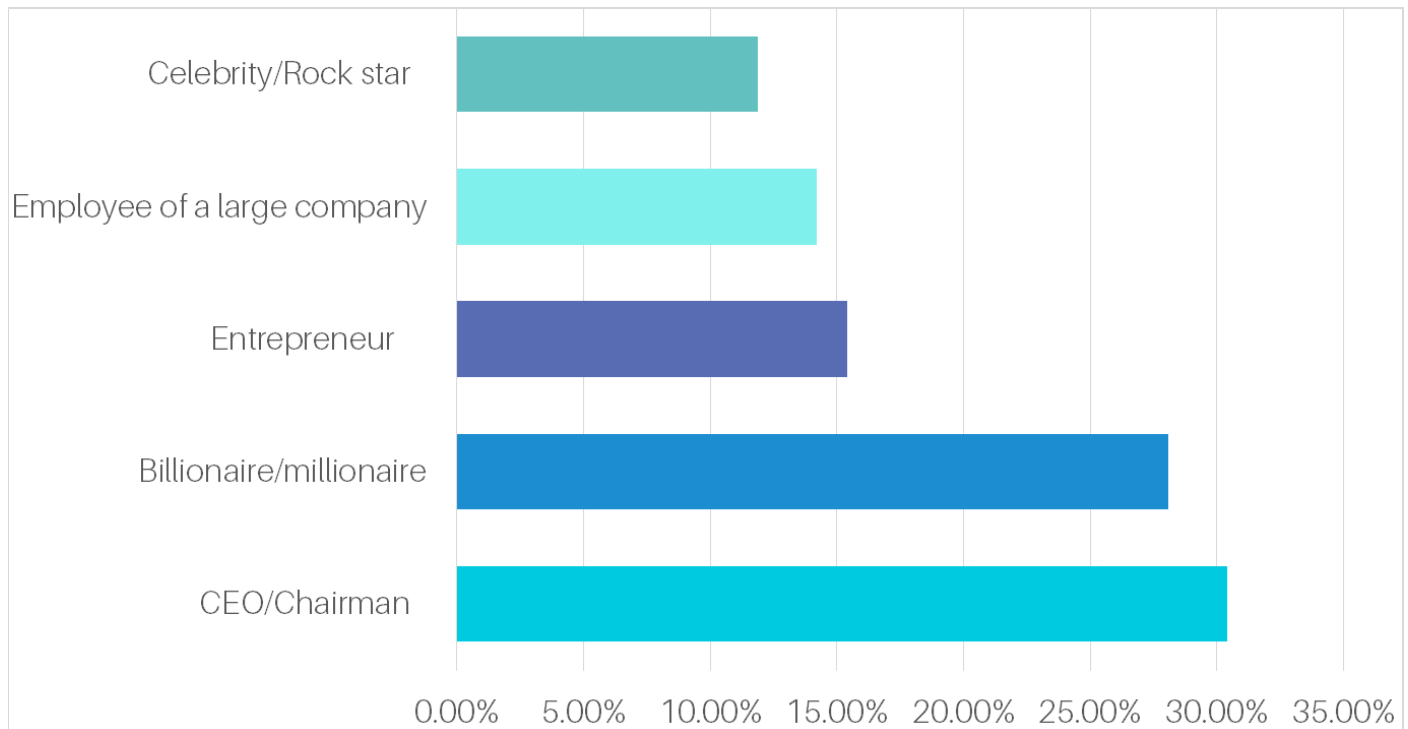
The surveys all used random answers to reduce bias. All of them were considered statistically significant – with more than a 95% confidence in the winning answer.

	Date Ended	Question	Country	Respondents
8.1	Oct 8 2015	Who do you think is flying on this jet? / Which statement do you agree with?	US	636 (500)
8.2	Oct 8 2015	What is the biggest brand in business aviation?	US	5,022 (5000)
8.3	May 9 2016	Do you think you will get the chance to fly on a private jet/business jet in the next 10 years?	US	1,049 (1000)
8.4	June 5 2017	Do you think you will get the chance to fly on a private jet/business jet in the next 10 years?	Japan	754 (1,000)
8.5	June 5 2017	What is the biggest brand in business aviation?	US	2,158 (2,500)
8.6	June 5 2017	Do you think you will get the chance to fly on a private jet/business jet in the next 10 years?	Germany	778 (1,000)
8.7	June 5 2017	Do you think you will get the chance to fly on a private jet/business jet in the next 10 years?	US	830 (1,000)
8.8	June 8 2017	Do you think you will get the chance to fly on a private jet/business jet in the next 10 years?	Australia	754 (1,006)
8.9	June 19 2017	Do you think you will get the chance to fly on a private jet/business jet in the next 10 years?	UK	866 (1,000)
				<b>Total: 12,847</b>

## 9.1.1

## US PERCEPTIONS 500 - 2017

Business jet insight: Who do you think is most likely to be flying on this?  
500 Target | 520 respondent(s) | October 8 2015



## Answer

CEO/Chairman	30.4% +4.1% / -3.8%
Billionaire/millionaire	28.1% +4.0% / -3.7%
Entrepreneur	15.4% +3.4% / -2.8%
Employee of a large company	14.2% +3.3% / -2.7%
Celebrity/Rock star	11.9% +3.1% / -2.5%
Total Respondent count	100.0% 520

## Data

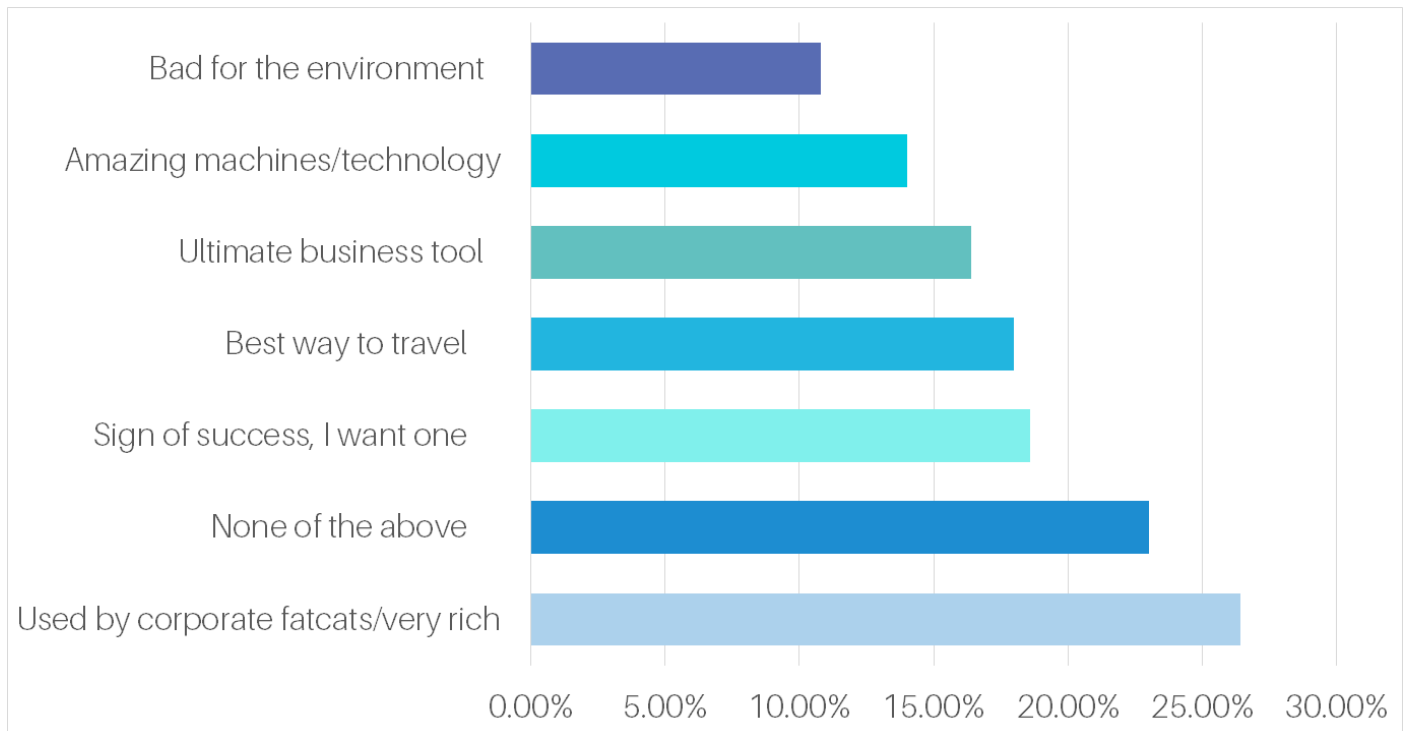
Group	Target Population	Sample	Sample Bias
Male	47.9%	61.5%	13.5%
Female	52.1%	38.5%	-13.5%
18-24	13.9%	21.3%	7.5%
25-34	19.4%	21.9%	2.5%
35-44	17.8%	18.6%	0.8%
45-54	18.3%	13.3%	-5.0%
55-64	16.4%	16.9%	0.5%
65+	14.2%	8.0%	-6.2%
US Midwest	22.0%	26.0%	4.0%
US Northeast	18.0%	19.6%	1.6%
US South	36.4%	28.3%	-8.2%
US West	23.6%	26.2%	2.5%

# 9.1.2

## WHAT DO YOU THINK OF BUSINESS JETS?

Business jet insight: What do you think of business jets? Multiple answer question. Please check all that apply

500 Target | 636 answer(s) | October 8 2015



**Answer**

**Data**

Used by corporate fat cats/very rich	26.4% +4.0% / -3.7%
None of the above	23.0% +3.9% / -3.5%
Sign of success - I want one	18.6% +3.6% / -3.2%
Best way to travel	18.0% +3.6% / -3.1%
Ultimate business tool	16.4% +3.5% / -3.0%
Amazing machines/technology	14.0% +3.3% / -2.8%
Bad for the environment	10.8% +3.0% / -2.4%
Total answers Respondent count	127.2% 500

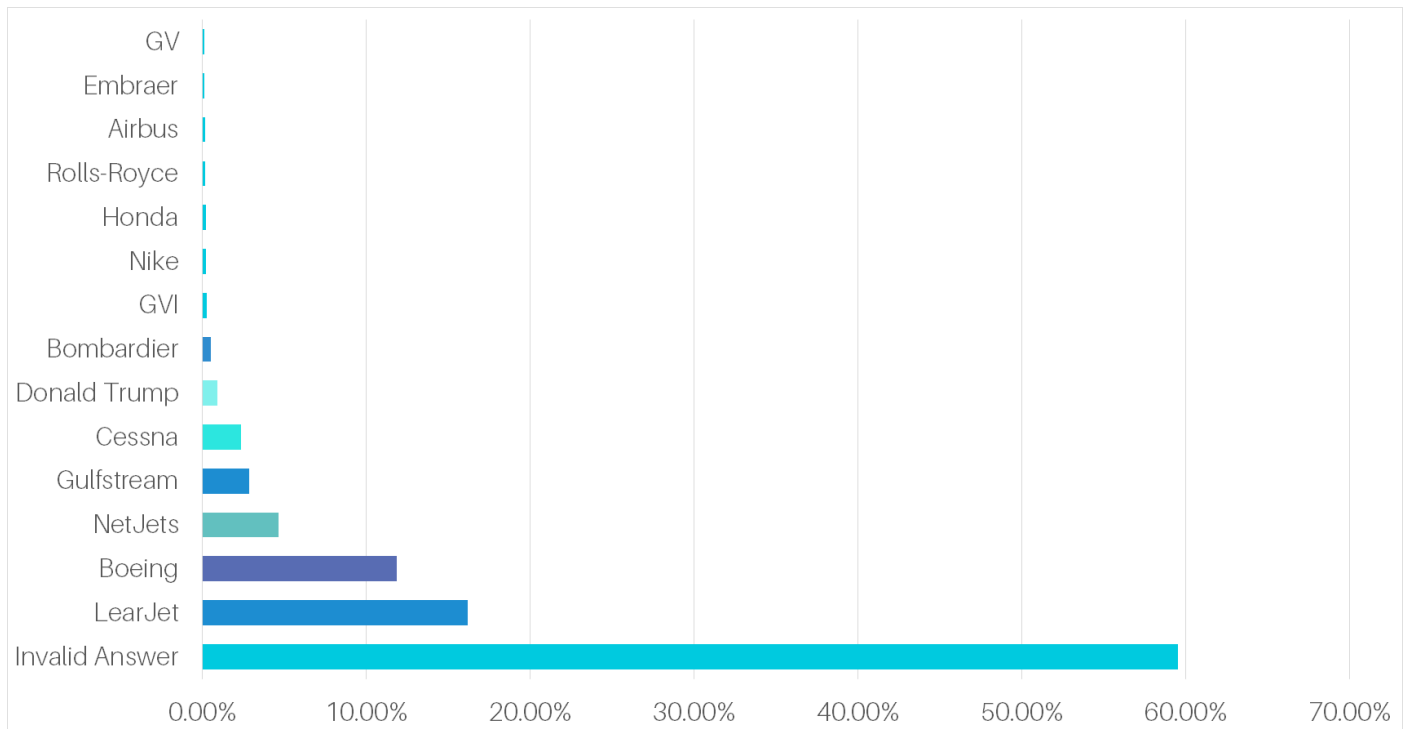
Group	Target Population	Sample	Sample Bias
Male	47.9%	61.7%	13.7%
Female	52.1%	38.3%	-13.7%
18-24	13.9%	21.2%	7.3%
25-34	19.4%	21.5%	2.1%
35-44	17.8%	19.2%	1.4%
45-54	18.3%	13.2%	-5.1%
55-64	16.4%	17.2%	0.8%
65+	14.2%	7.7%	-6.5%
US Midwest	22.0%	26.6%	4.6%
US Northeast	18.0%	19.8%	1.8%
US South	36.4%	27.2%	-9.2%
US West	23.6%	26.4%	2.8%

## 9.2

## WHAT IS THE BIGGEST BRAND IN BUSINESS AVIATION 2016?

-US

5000 Target | | 5022 respondent(s) | October 8 2015



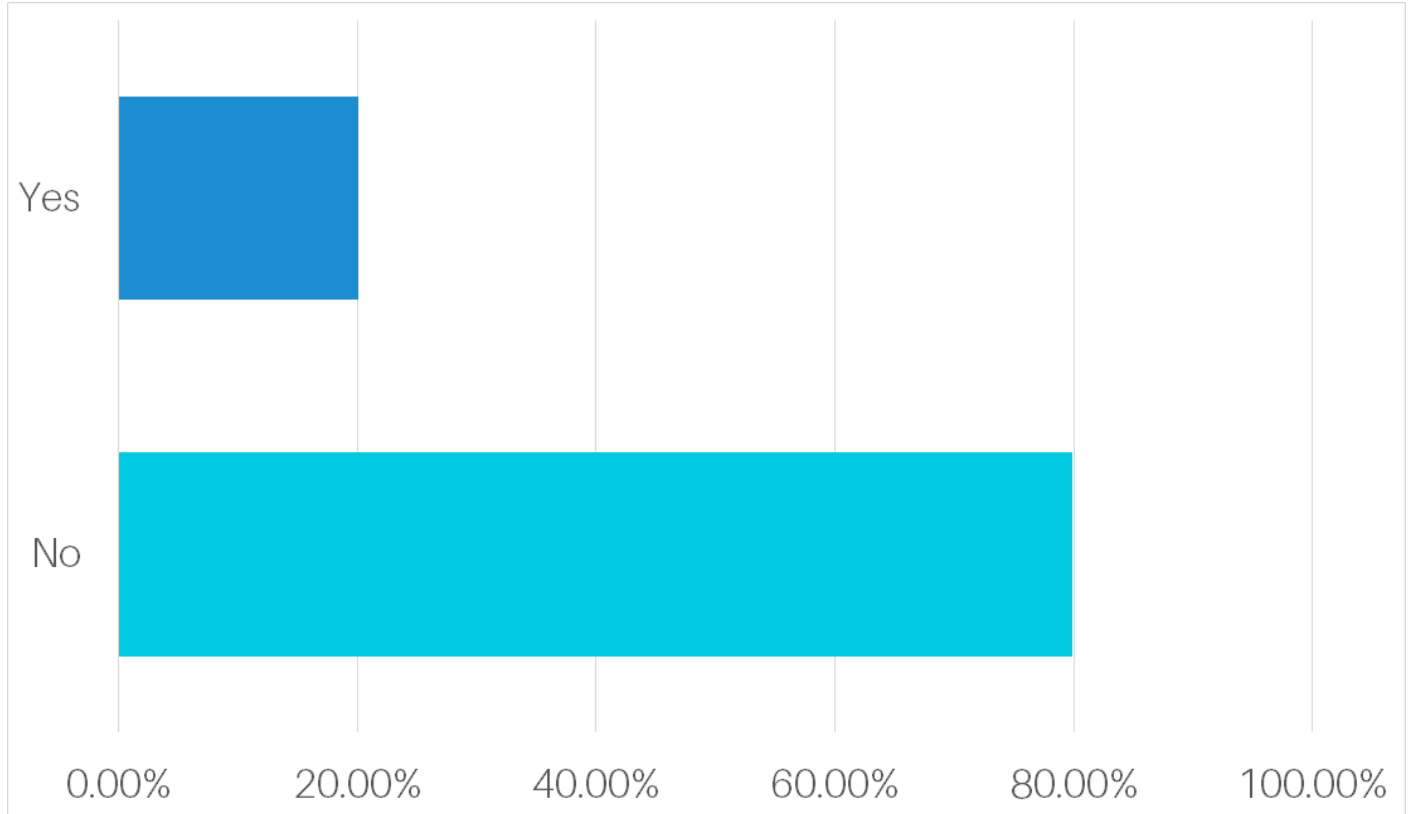
Answer	Data
Invalid answer	59.53
LearJet	16.15
Boeing	11.86
Netjets	4.64
Gulfstream	2.82
Cessna	2.33
Donald Trump	0.89
Bombardier	0.5
GVI	0.23
Nike	0.2
Honda	0.19
Rolls-Royce	0.13
Airbus	0.13
Embraer	0.08
GV	0.08

# 9.3

## DO YOU THINK YOU WILL GET THE CHANCE TO FLY ON A PRIVATE JET? - US 2016

Do you think you will get the chance to fly on a private jet/business jet in the next 10 years?

1000 Target | 1,049 respondent(s) | May 09 2016



Answer	Data
No	79.9% +2.3% / -2.5%
Yes	20.1% +2.5% / -2.3%
Total Respondent count	100.0% 1,049

Group	Target Population	Sample	Sample Bias
Male	47.9%	52.8%	4.9%
Female	52.1%	47.2%	-4.9%
18-24	13.9%	13.5%	-0.4%
25-34	19.4%	20.2%	0.8%
35-44	17.8%	18.1%	0.3%
45-54	18.3%	20.0%	1.6%
55-64	16.4%	15.1%	-1.3%
65+	14.2%	13.2%	-1.0%
US Midwest	22.0%	26.0%	4.1%
US Northeast	18.0%	15.0%	-3.0%
US South	36.4%	34.6%	-1.8%
US West	23.6%	24.4%	0.8%

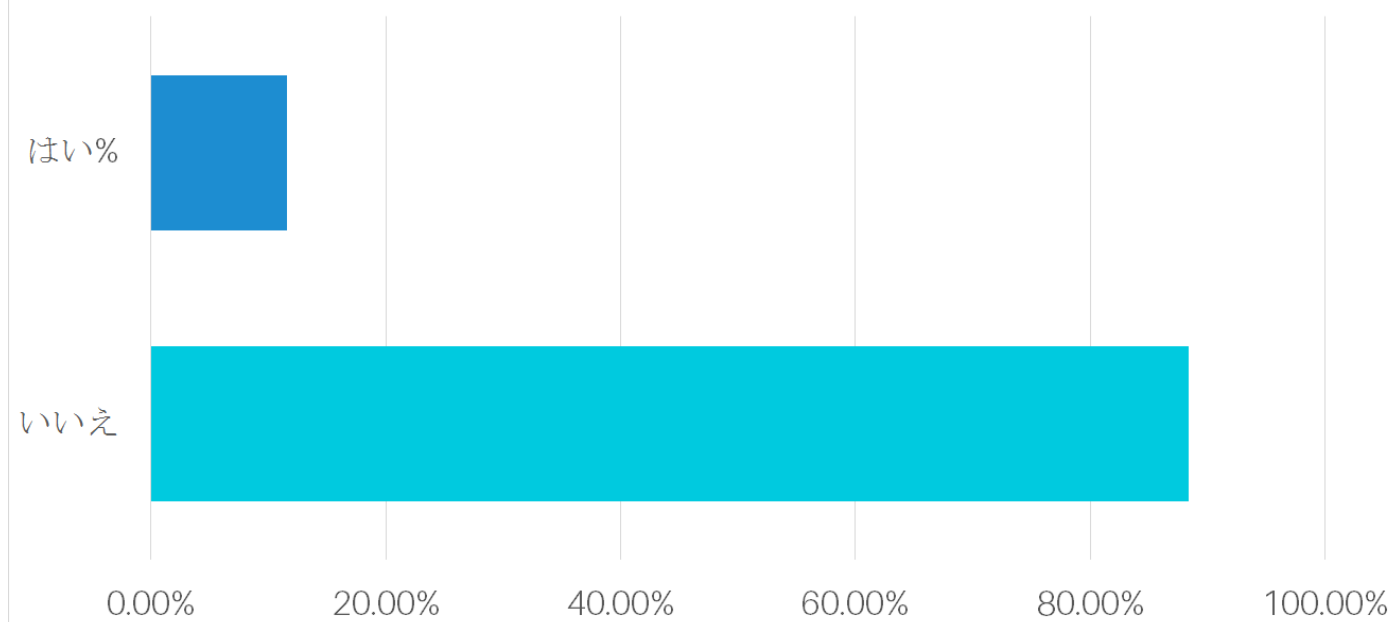
## 9.4

## DO YOU THINK YOU WILL GET THE CHANCE TO FLY ON A PRIVATE JET? - JAPAN

Do you think you will get the chance to fly on a private jet/business jet in the next 10 years?

1000 target | 754 respondent(s) | June 5 2017

未来の10年中に、自家用ジェット機とビジネス用ジェット機に乗るチャンスがある？



## Answer

## Data

No 88.4% +1.9% / -2.2%

Yes 11.6% +2.1% / -1.8%

Total Respondent count 100.0% 754

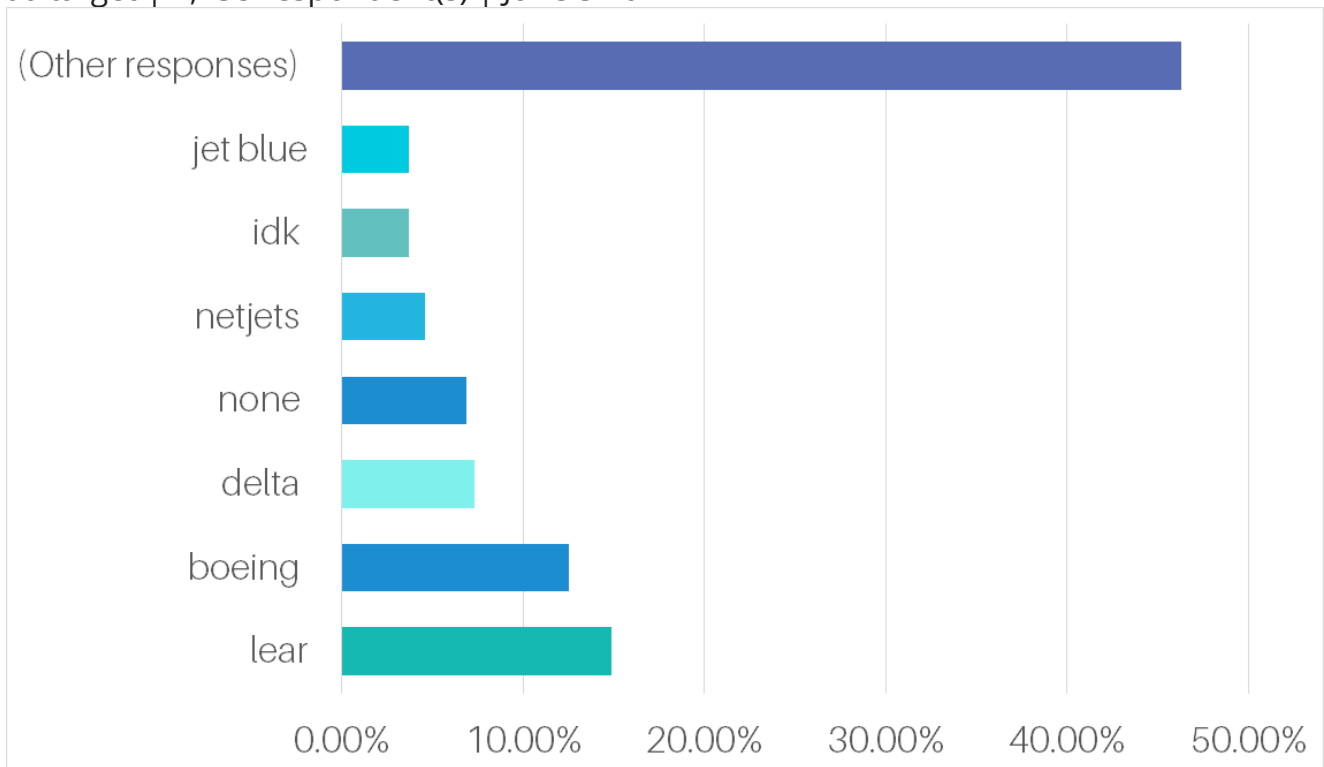
Group	Target Population	Sample	Sample Bias
Male	49%	51.5%	2.5%
Female	51.0%	48.5%	-2.5%
18-24	9.0%	10.1%	1.1%
25-34	15.1%	21.0%	5.9%
35-44	17.2%	26.4%	9.2%
45-54	16.3%	21.4%	5.1%
55-64	17.0%	12.9%	-4.1%
65+	25.4%	8.4%	-17.1%
JP Hokkaido	4.3%	6.2%	1.8%
JP Tohoku	7.0%	7.5%	0.6%
JP Kanto	34.1%	29.2%	-4.9%
JP Chubu	16.8%	15.4%	-1.5%
JP Kansai	17.9%	18.2%	0.2%
JP Chugoku	5.8%	7.2%	1.4%
JP Shikoku	3.0%	3.7%	0.7%
JP Kyushu	11.0%	12.7%	1.7%

# 9.5

## WHAT IS THE BIGGEST BRAND IN BUSINESS AVIATION 2017? -US

What is the first company or brand that you associate with business jets or private jets?

2500 target | 2,158 respondent(s) | June 5 2017



**Answer**

Brand	Data
lear	14.9% +1.5% / -1.4%
boeing	12.5% +1.3% / -1.2%
delta	7.3% +1.1% / -1.0%
none	6.9% +1.1% / -0.9%
netjets	4.6% +0.8% / -0.7%
idk	3.7% +0.8% / -0.7%
jet blue	3.7% +0.8% / -0.7%
(Other responses)	46.3% +2.0% / -1.9%
Total Respondent count	100.0% 2,158

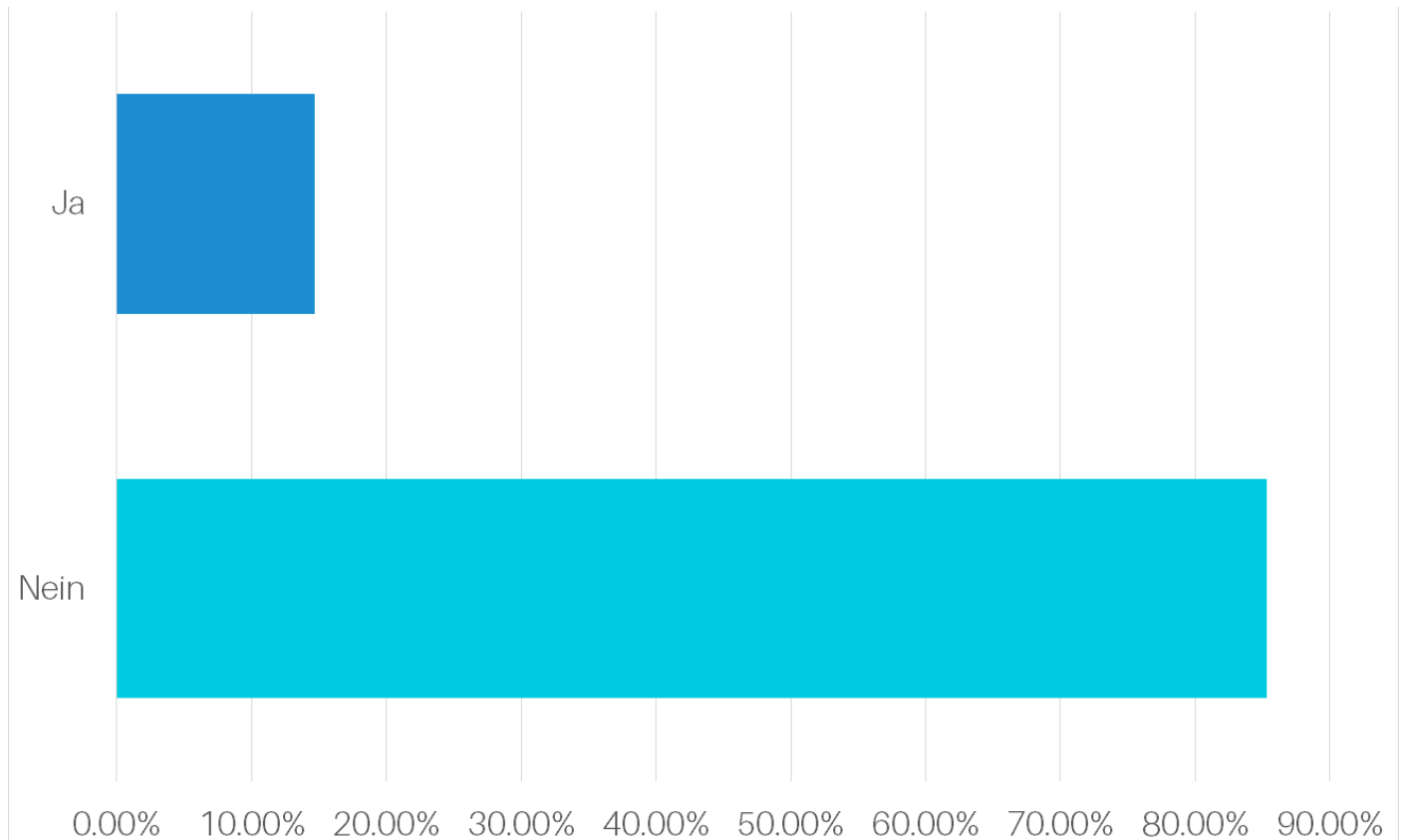
Group	Target Population	Sample	Sample Bias
Male	47.9%	56.9%	9.0%
Female	52.1%	43.1%	-9.0%
18-24	13.9%	14.6%	0.7%
25-34	19.4%	19.9%	0.5%
35-44	17.8%	19.9%	2.1%
45-54	18.3%	18.7%	0.4%
55-64	16.4%	16.9%	0.5%
65+	14.2%	10.1%	-4.2%
US Midwest	22.0%	28.5%	6.6%
US Northeast	18.0%	18.0%	0.0%
US South	36.4%	31.4%	-5.1%
US West	23.6%	22.1%	-1.6%

## 9.6

## DO YOU THINK YOU WILL GET THE CHANCE TO FLY ON A PRIVATE JET? - GERMANY

Glaubst du, du wirst jemals in einem Business Jet / Corporate Jet fliegen?

1000 target | 778 respondent(s) | June 5 2017



Answer	Data
No	85.3% +2.2% / -2.5%
Yes	14.7% +2.2% / -2.0%
Total Respondent count	100.0% 778

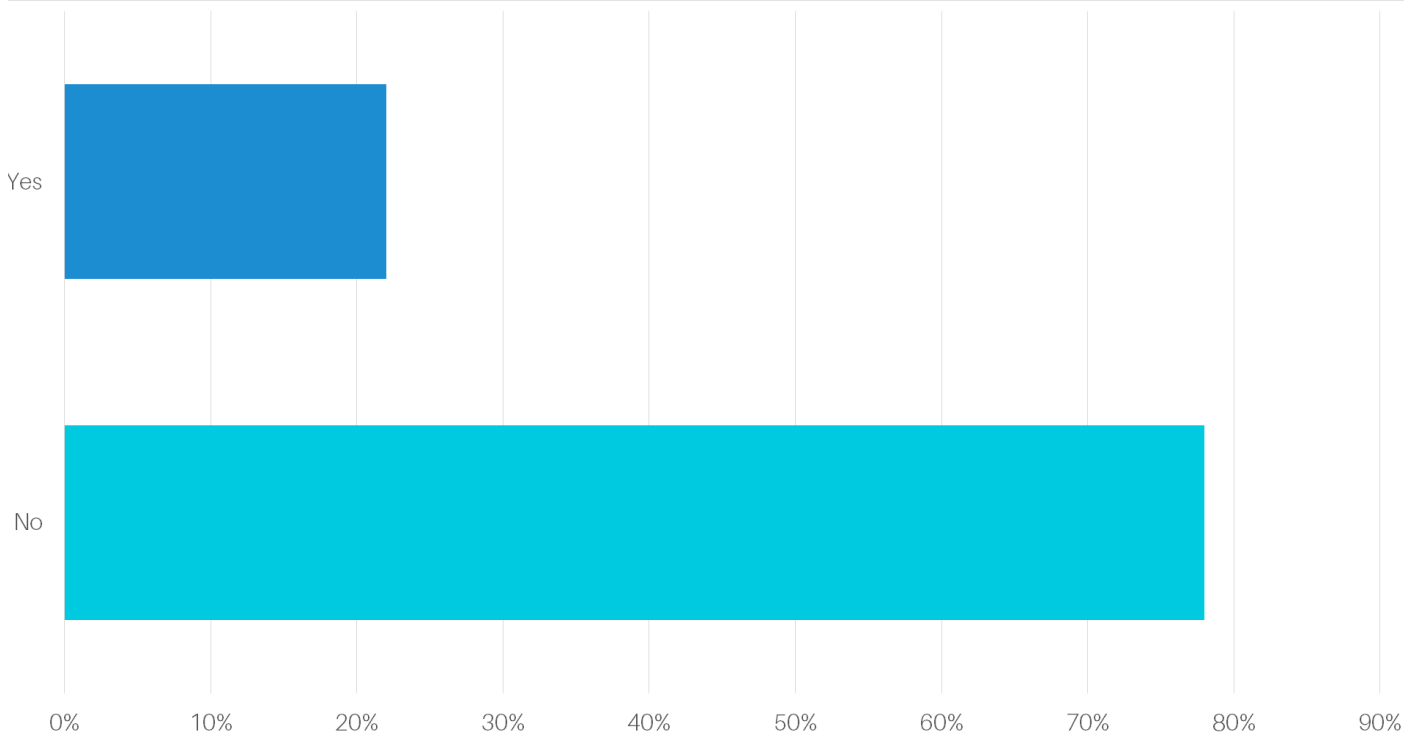
Group	Target Population	Sample	Sample Bias
Male	51.8%	55.1%	3.2%
Female	48.2%	44.9%	-3.2%
18-24	12.5%	15.0%	2.6%
25-34	18.4%	19.7%	1.4%
35-44	20.5%	21.7%	1.2%
45-54	20.9%	17.1%	-3.9%
55-64	15.0%	16.3%	1.3%
65+	12.7%	10.2%	-2.6%
DE	100.0%	100.0%	0.0%

# 9.7

## DO YOU THINK YOU WILL GET THE CHANCE TO FLY ON A PRIVATE JET? - US 2017

Do you think you will get the chance to fly on a private jet/business jet in the next 10 years?

1000 Target | 830 respondent(s) | June 5 2017



Answer	Data
No	78.0% +2.5% / -2.7%
Yes	22.0% +2.6% / -2.4%
Total Respondent count	100.0% 830

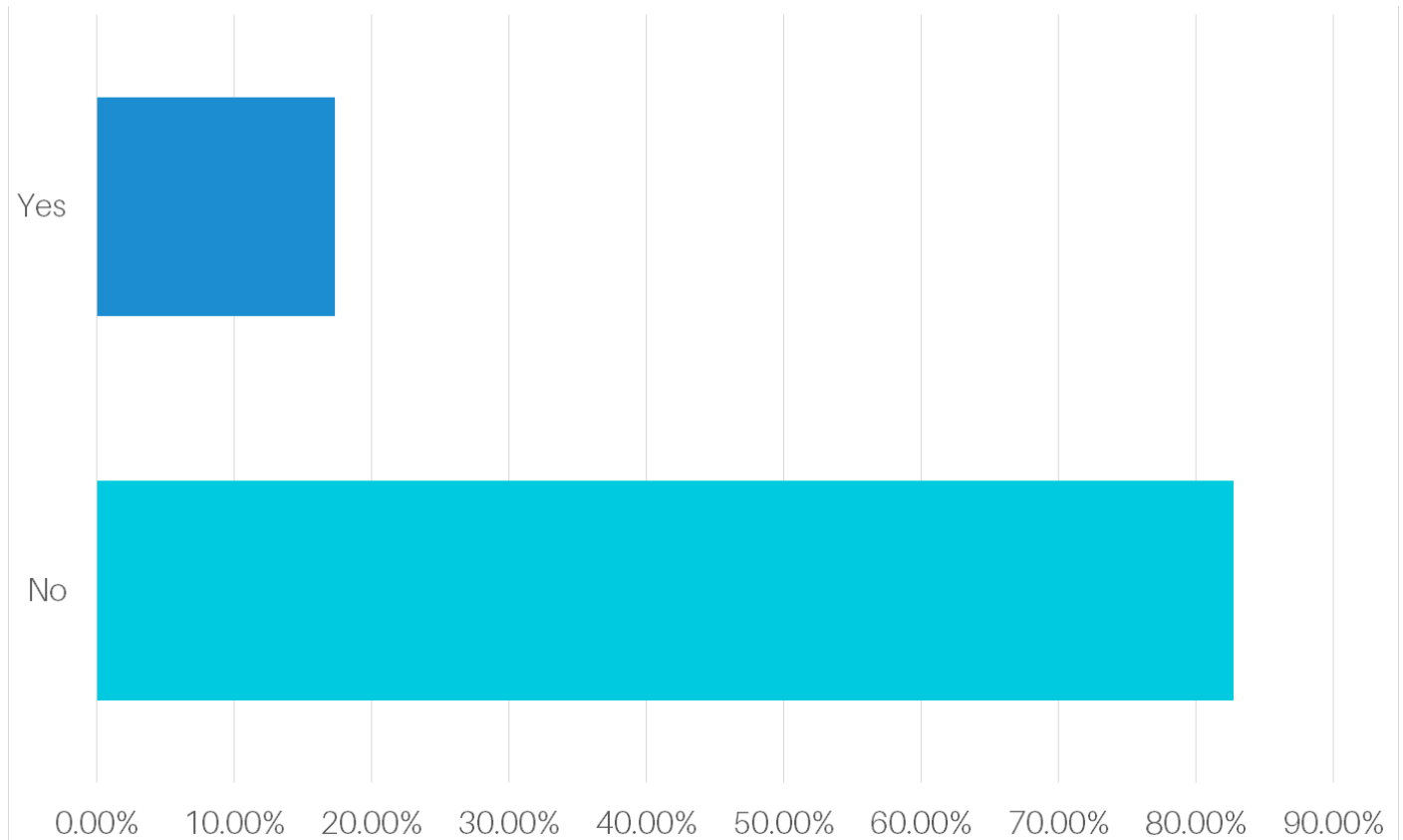
Group	Target Population	Sample	Sample Bias
Male	47.9%	56.5%	8.5%
Female	52.1%	43.5%	-8.5%
18-24	13.9%	14.6%	0.8%
25-34	19.4%	19.7%	0.3%
35-44	17.8%	17.4%	-0.4%
45-54	18.3%	19.0%	0.7%
55-64	16.4%	16.0%	-0.4%
65+	14.2%	13.3%	-0.9%
US Midwest	22.0%	29.8%	7.8%
US Northeast	18.0%	18.3%	0.3%
US South	36.4%	30.2%	-6.3%
US West	23.6%	21.8%	-1.8%

## 9.8

## DO YOU THINK YOU WILL GET THE CHANCE TO FLY ON A PRIVATE JET? - AUSTRALIA 2017

Do you think you will get the chance to fly on a private jet/business jet in the next 10 years?

1000 Target | 754 respondent(s) | June 8 2017



Answer	Data
No	82.7% (+2.3% / -2.6%)
Yes	17.3% (+2.4% / -2.1%)
Total (Respondent count)	100.0% (754)

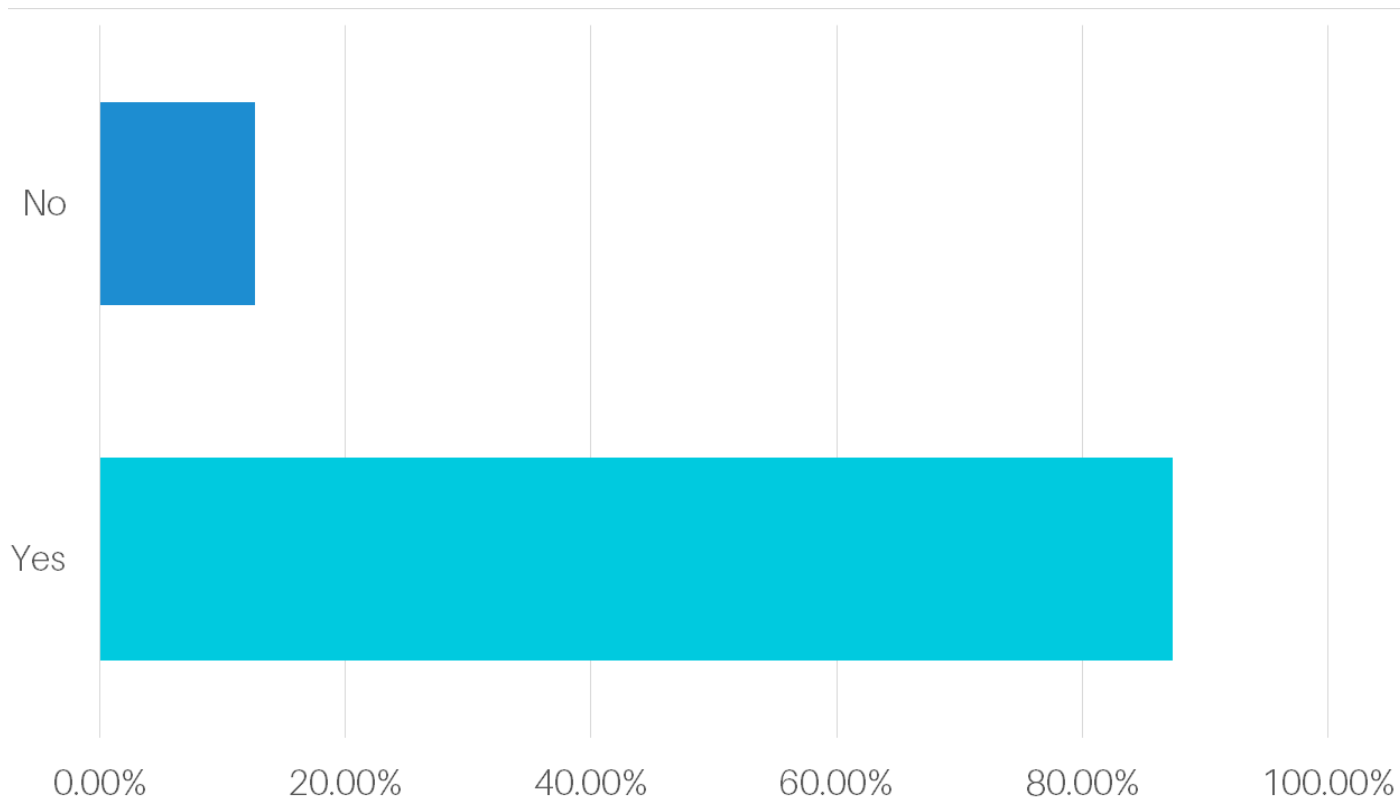
Group	Target Population	Sample	Sample Bias
Male	50.9%	57.1%	6.1%
Female	49.1%	42.9%	-6.1%
18-24	20.3%	20.0%	-0.3%
25-34	19.7%	19.9%	0.2%
35-44	19.1%	18.4%	-0.6%
45-54	18.0%	17.6%	-0.4%
55-64	15.0%	14.2%	-0.9%
65+	7.8%	9.8%	2.0%
AU	100.0%	100.0%	0.0%

# 9.9

## DO YOU THINK YOU WILL GET THE CHANCE TO FLY ON A PRIVATE JET? - UK 2017

Do you think you will get the chance to fly on a private jet/business jet in the next 10 years?

1000 target | 866 respondent(s) | June 19 2017



Answer	Data
No	87.4% (+1.9% / -2.2% )
Yes	12.6% (+2.2% / -1.9%)
Total (Respondent count) 100.0% (866)	

Group	Target Population	Sample	Sample Bias
Male	50.1%	52.1%	2.0%
Female	49.9%	47.9%	-2.0%
18-24	16.3%	16.2%	-0.1%
25-34	19.7%	19.7%	-0.0%
35-44	18.4%	17.7%	-0.7%
45-54	19.0%	18.4%	-0.6%
55-64	14.0%	14.5%	0.5%
65+	12.6%	13.5%	0.8%
UK England	84.4%	77.3%	-7.2%
UK Scotland	8.4%	12.5%	4.1%
UK Wales	4.7%	7.1%	2.4%
UK Northern Ireland	2.6%	3.2%	0.6%



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