



SEVENTH WORLDWIDE AIR TRANSPORT CONFERENCE (ATCONF/7)

Montréal, HQ, 16 to 20 November 2026

Agenda Item 3: Strengthening regulatory and institutional frameworks

3.2: Enhancing air connectivity through progressive economic and regulatory aviation frameworks for international air transport

REGIONAL DATA INSIGHTS ON THE SOCIO-ECONOMIC CONTRIBUTIONS OF BUSINESS AVIATION TO CONNECTIVITY, ECONOMIC DEVELOPMENT, AND SOCIETAL RESILIENCE

(Presented by the International Business Aviation Council – IBAC)

EXECUTIVE SUMMARY

Business aviation encompasses a diverse range of aircraft, operators and missions, serving businesses, communities and organizations worldwide - in urban centres, smaller communities and remote regions. By extending essential air links far beyond commercial airline networks, the sector connects thousands of underserved airfields, facilitates international trade and investment, and provides important support for emergency medical services, disaster relief, and regional economic development. Business aviation is also an integral part of the broader aviation innovation ecosystem, contributing to the development and demonstration of new aircraft technologies, operating concepts, and sustainability solutions. Grounded in recent empirical data from Europe, Canada and the United States, this information paper illustrates these contributions and considers how policy frameworks that foster operational flexibility and technological innovation can unlock substantial socio-economic returns, strengthen communities, and improve aviation connectivity.

1. INTRODUCTION

1.1 Business aviation is a diverse component of the global civil aviation system, encompassing a wide range of aircraft and operations. It provides point-to-point connectivity for businesses, communities and organizations, as well as specialized services such as medical, humanitarian and emergency-response missions. Its scale and operational diversity provide useful context for considering the range of connectivity and mobility needs served by air transport.

1.2 Business aviation operates a highly versatile global fleet of over 80,000 active aircraft.¹ Almost 50,000 fixed-wing aircraft — including nearly 26,000 jet aircraft, roughly 17,000 turboprops, and almost 6,000 piston airplanes — operate alongside a fleet of more than 34,000 helicopters, including turbine and piston rotorcraft. This diverse fleet operates across a wide range of missions and operating

¹ Jetnet Aviation Intelligence Reports - <https://www.jetnet.com>

environments, providing direct air links to destinations often not served by scheduled airlines, including locations where conventional airport or runway infrastructure may be limited.

1.3 Business aviation is an important part of the civil aviation system and generates significant economic and societal benefits. Evidence from Canada, Europe and the United States demonstrates that business aviation's contribution extends well beyond flying aircraft. Specifically, the sector:

- a) connects tens of thousands of airport pairs that have no scheduled commercial service equivalent, and gives smaller and remote communities access to the air transport network;
- b) supports businesses of all sizes and the communities they serve, and facilitates productivity, investment and economic development;
- c) sustains high-value aerospace manufacturing and skilled employment;
- d) provides specialized medical, humanitarian and emergency-response capabilities; and
- e) offers an early-adopter, real-world environment in which new aviation technologies and operating concepts are developed and tested.

1.4 As the International Civil Aviation Organization (ICAO) considers the future of international air transport at the Seventh Worldwide Air Transport Conference (ATConf/7), business aviation is one example of the diversity of air transport and its contribution to connectivity, economic development and societal needs. Recognizing the full spectrum of this diversity can help inform policies that are responsive to the different operating models, users and communities that make up the air transport system.

2. CONTRIBUTION TO ECONOMIC ACTIVITY AND PRODUCTIVITY

2.1 The economic contribution of business aviation extends beyond its direct operational activities. Its ability to operate from a broad network of airports, heliports, and increasingly, emerging forms of aviation infrastructure such as vertiports, enables it to support economic development in smaller communities and remote regions as well as major economic centres. A Canadian study identifies business aviation as contributing to regional economic activity and quality of life, including by supporting healthcare connectivity and the movement of personnel and resources to remote areas.²

2.2 The economic contribution of business aviation can be assessed at three levels. Direct impacts cover flight operations and aircraft manufacturing. Indirect impacts arise through supply chains, and induced impacts arise when employees spend their wages in the wider economy.³

2.3 Canadian data illustrate the scale of these contributions. In 2022, business aviation generated CAD 11.7 billion in direct economic output.⁴ Including indirect and induced effects, total economic output was CAD 17.9 billion, about 1.5 times the direct figure.⁵ The same study estimated that business aviation supported approximately 54,000 jobs in Canada. Comparable studies in Europe⁶ and the

² InterVISTAS & CBAA, *Economic Impact of Business Aviation Operations and Manufacturing in Canada*, 2023, 29.

³ InterVISTAS Consulting & CBAA, *Economic Impact*, iii

⁴ InterVISTAS Consulting & CBAA, *Economic Impact*, ii

⁵ InterVISTAS Consulting & CBAA, *Economic Impact*, iv-v

⁶ Oxford Economics, EBAA & GAMA, *The Economic Impact of Business Aviation in Europe*, 2025

United States indicate that these economic and employment effects extend across a much broader geographic area, including through aerospace manufacturing, aviation services and related supply chains.

2.4 Business aviation also supports organizations of different sizes and across a range of economic sectors. National Business Aviation Association (NBAA) reports that 57 per cent of companies using business aviation have 500 or fewer employees, while 62 per cent operate only one turbine-powered aircraft.⁷ This data illustrates that business aviation is used not only by large corporations, but also by smaller and medium-sized enterprises and other organizations whose connectivity needs may not be met through scheduled air services alone.

2.5 Looking ahead, an industry forecast projects deliveries of approximately 8,750 new business jets worldwide between 2025 and 2034, with a cumulative market value of USD 335 billion.⁸ This indicates the expected scale of aircraft production and the associated global supply chain.

3. REGIONAL CONNECTIVITY, RESILIENCE, AND COMMUNITY LIFELINES

3.1 Business aviation provides connectivity between a large number of airport pairs that are not served by scheduled commercial air transport. It links communities and businesses outside commercial airline networks, helping to address the "connectivity gap" that often limits regional growth.⁹

3.2 In Europe, approximately 80,000 unique airport pairs were served by business aviation in 2023. Over 900 airports used by business aviation had no non-stop commercial connection. Overall, approximately 91 per cent of business aviation routes, accounting for about three quarters of business aviation flights, had no direct commercial alternative.¹⁰ The United States provides a further illustration of this connectivity. Business aviation provides access to approximately 5,000 airports, compared with approximately 500 airports served by commercial airlines. Additionally, approximately 80 per cent of business aircraft flights are to airports in small towns and communities.¹¹

3.3 Business aviation can also provide a different form of connectivity from scheduled services. For example, NBAA reports that almost 40 per cent of business aviation missions involve multiple destinations.¹² This capability can enable personnel to connect with customers, suppliers, facilities and worksites across several locations within a single trip.

3.4 These figures illustrate that business aviation connectivity is not simply a substitute for scheduled airline services. It can provide point-to-point access where scheduled services are unavailable or do not meet the operational requirements of users. Locations that would otherwise require indirect or considerably longer journeys can be reached directly. This connectivity is particularly relevant to smaller airports, remote communities and regions outside major commercial aviation centres.

3.5 Business aviation in Europe operated approximately 70,000 medical flights in 2023, equivalent to more than 190 flights per day.¹³ In the United States, the NBAA Business Aviation Fact Book estimates that business aircraft are used for approximately 15,000 humanitarian flights each year, providing another illustration of the sector's role in humanitarian and emergency response.¹⁴ The Canadian study also

⁷ NBAA, Business Aviation Fact Book, 2025, 1, 3, & 15

⁸ Rolland Vincent Associates. [Back to the Future](#). RVA Report. 2025, 4, 19, 21, 22, & 31-32

⁹ InterVISTAS Consulting & CBAA, *Economic Impact*, 15

¹⁰ Oxford Economics, EBAA & GAMA, Business Aviation in Europe, 10-11

¹¹ NBAA, Business Aviation Fact Book, 2025, 14

¹² NBAA, Business Aviation Fact Book, 2025, 4, 10, 11, & 32

¹³ Oxford Economics, EBAA & GAMA, Business Aviation in Europe, 17-18

¹⁴ NBAA, Business Aviation Fact Book, 2025. 1, & 18-21

identifies business aviation as an important capability for responding rapidly to natural disasters and other crises.¹⁵ Aircraft can be deployed to transport medical personnel, supplies or other resources to airports that may not be served by scheduled commercial operations, including in circumstances where time and access are critical.

3.6 These capabilities illustrate that business aviation connectivity has value beyond passenger volumes. The ability to reach a destination quickly, directly and flexibly can provide economic and societal benefits that are not fully captured by measures focused on scheduled passenger traffic alone.

4. INNOVATION, SUSTAINABILITY, AND THE BROADER AVIATION ECOSYSTEM

4.1 Business and general aviation also form part of the broader aviation innovation ecosystem. The Oxford Economics study notes that European aviation authorities and organizations identify general and business aviation as an environment for innovation and technology development. Examples include the development and application of winglet technology and the testing of emerging propulsion technologies.¹⁶ The NBAA Business Aviation Fact Book similarly highlights the role of business and general aviation in the development and early adoption of innovative technologies such as lightweight materials, drag-reduction technologies, and satellite-based communications and navigation.¹⁷

4.2 Business aviation's climate commitments are set out in the Business Aviation Commitment on Climate Change (BACCC), announced by General Aviation Manufacturers Association (GAMA) and International Business Aviation Council (IBAC) in 2009 and renewed in 2021. The updated commitment targets net-zero carbon emissions by 2050, an average fuel-efficiency improvement of 2 per cent per year from 2020 to 2030, and carbon-neutral growth from 2020 onwards.¹⁸ The BACCC reports an average fuel-efficiency improvement of 1.9 per cent per year since 2010 and estimates that business aviation accounts for about 0.04 per cent of CO₂ emissions from human activity. Forecasts indicate that the net-zero goal could be reached through a combination of technology, sustainable aviation fuels, operational and infrastructure improvements and, for any residual, global market-based measures.

4.3 The industry notes that achieving these goals depends on government support, including policies that accelerate the uptake of Sustainable Aviation Fuel (SAF), investment in research and deployment, and certification and regulatory processes that keep pace with technological progress. For example, business aviation operates at many smaller and regional airports where the availability of SAF and related infrastructure can differ from that at major hubs, and having a harmonized SAF accounting framework such as Book & Claim would enable wider SAF adoption globally.

4.4 Business aviation also contributes to the aviation industrial base through aircraft manufacturing, maintenance, repair and overhaul, airport services and associated supply chains. These activities support specialized skills, technology development and employment in multiple regions. Business and general aviation can therefore provide an environment in which new technologies, operating concepts and sustainability solutions are developed, demonstrated and brought into wider aviation use.

¹⁵ InterVISTAS Consulting & CBAA, *Economic Impact*. 29

¹⁶ Oxford Economics, EBAA & GAMA, *Business Aviation in Europe*, 15-16

¹⁷ NBAA, *Business Aviation Fact Book*, 2025, 26, 30

¹⁸ GAMA & IBAC, *Business Aviation Commitment on Climate Change: Destination Net-Zero Carbon Emissions*, 2023

5. RELEVANCE TO THE FUTURE AIR TRANSPORT SYSTEM

5.1 The international air transport system comprises a diverse range of complementary operations. Scheduled commercial airlines are a central component, with business aviation also contributing to global air connectivity, particularly where scheduled services are not available. The evidence presented in this information paper, which draws on industry-commissioned studies and industry data, illustrates that business aviation fulfills distinct operational functions: linking thousands of regional and secondary airfields not served by commercial networks, supporting local economic development, and providing rapid-response medical and humanitarian capabilities.

5.2 This evidence suggests three considerations for future air transport planning:

- a) **Expanded Connectivity Metrics:** National and global air connectivity indicators could be strengthened by recognizing non-scheduled routes and direct point-to-point connections that serve communities without commercial airline service.
- b) **Innovation Environment:** Business aviation provides operating environments in which new technologies and operating concepts are developed, tested and demonstrated, as described above.
- c) **Proportional Policy Frameworks:** The evidence illustrates that different forms of air transport have distinct operating characteristics, connectivity functions and societal contributions that may be relevant to States considering regulatory and infrastructure frameworks which aim to support equitable access and increased connectivity.

5.3 Taken together, the evidence illustrates the range of economic, connectivity, societal and innovation-related functions associated with business aviation. These characteristics provide context for considering business aviation alongside other forms of air transport as the international aviation system evolves.

5.4 Recognizing the complementary nature of business aviation can contribute to a more comprehensive and resilient global air transport system. Embedding these considerations into future policy and investment priorities can help Member States foster regional economic development and safeguard community lifelines across the international civil aviation system.

— END —