

# European Business Aviation COVID-19 Impact Survey

April 2020



# Foreword

The European Business Aviation Association (EBAA) is actively and closely monitoring developments related to the COVID-19 outbreak. **EBAA invited CEOs of companies involved in the European Business Aviation sector to participate in a brief anonymous survey to evaluate the impact of the COVID-19 on their companies.** This online survey was conducted between 26 March and 2 April 2020.

- **Number of participants:** 125 complete responses – with more than 50% of respondents being operators.
- **Geographical spread of responses:** Austria, Belgium, Bulgaria, Czech Republic, Denmark, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Luxembourg, Malta, Netherlands, Poland, Spain, Sweden, Switzerland and the United Kingdom.

**The COVID-19 pandemic is having a devastating impact on the aviation sector.** Just like our partners in the airlines' industry, the 374,000 people who work in the European Business Aviation sector (and their families) are facing a crisis of unprecedented magnitude and uncertain futures. Our survey reveals that **1/3 of European operators have halted operations altogether**, and **estimated revenue losses for the thousands of SMEs** that make up our sector currently **range from 50-90%**. CEOs surveyed identified **staffing, fixed location costs and taxes as the 3 most pressing financial issues.**

On 2 April 2020, EBAA along with the European Business Aviation community sent an [open letter](#) urging European policy-makers and regulators to protect the continuity and survival of the Business Aviation sector in the face of the COVID-19 pandemic. The measures detailed in our joint letter aim at the same objective; **helping to safeguard as many companies as possible in our sector.** Business Aviation has a [vital role to play](#) in the fight against COVID-19 and the post-crisis European recovery.

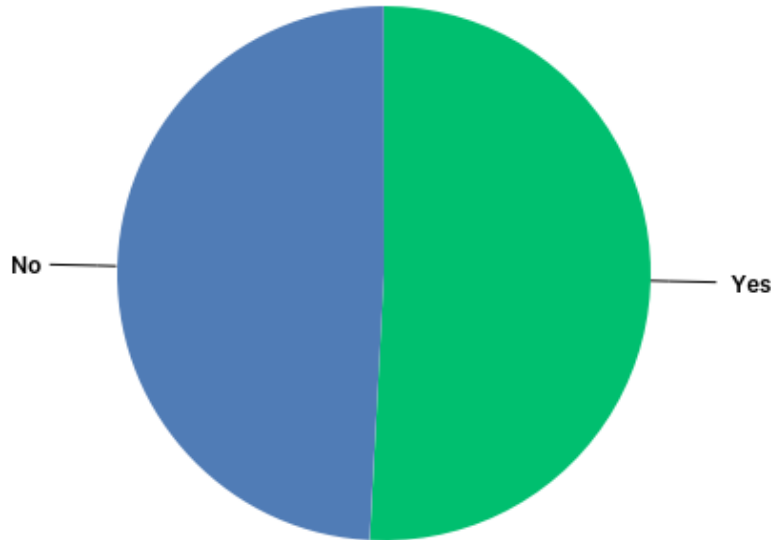
Should you have any questions on this survey, please contact Frederique at [fluca@ebaa.org](mailto:fluca@ebaa.org).

Thank you for your interest.

**The EBAA Team**

## Q2: Are you a business aviation operator?

Answered: 173 Skipped: 0

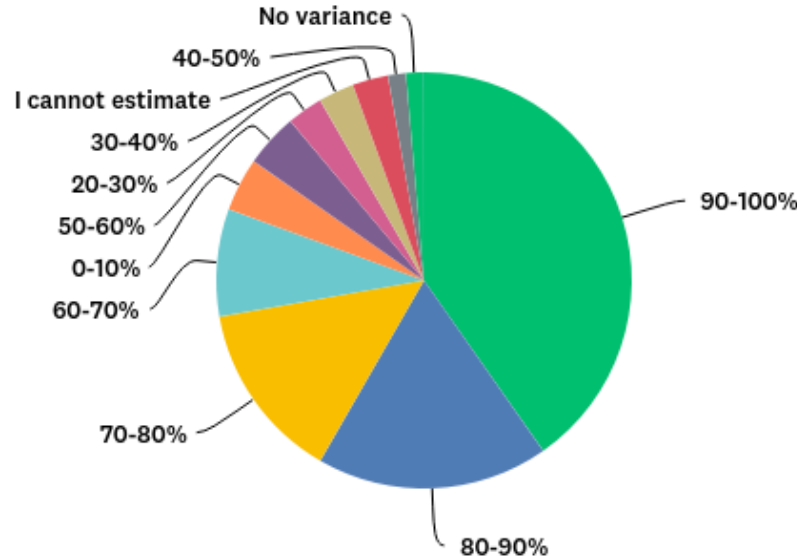


### Insights

- 125 complete responses
- 50% of respondents are **business aviation operators**
- 50% of respondents include **wider business aviation community**, including airports ground handlers, fuel suppliers, maintenance organisations, manufacturers, and other dedicated service providers.

### Q3: Can you estimate your decrease in flight time compared to what you had planned for? (operators only)

Answered: 72 Skipped: 101

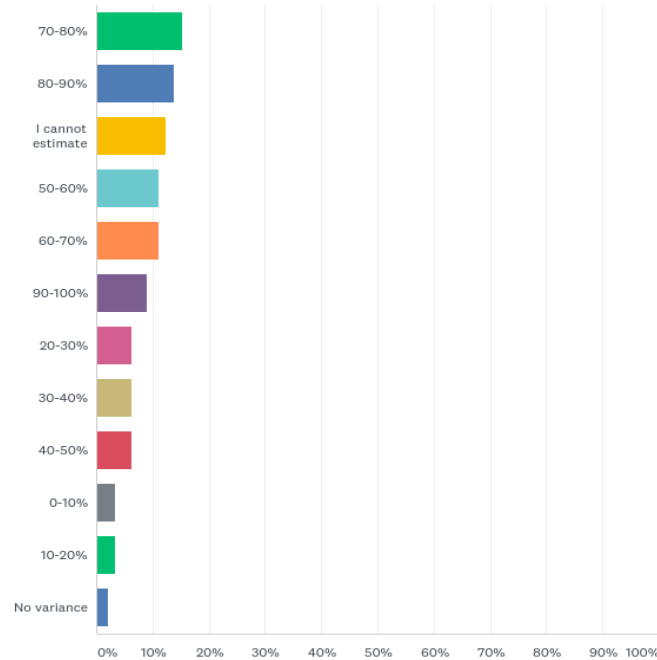


#### Insights

- Decrease in flight time for operators across Europe ranges from 50-100% (with variations per country or region)
- 40% estimate decrease in flight time of 90-100%.

## Q4: Can you estimate your company's loss of revenue due to the crisis compared to its budgeted forecast?

Answered: 145 Skipped: 28

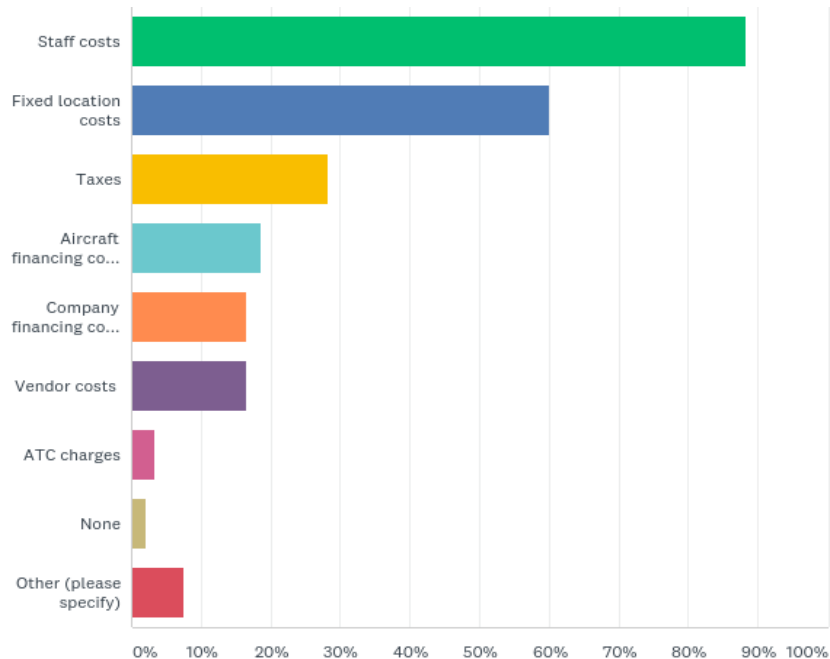


### Insights

- Estimated financial losses range from 50-90%.
- A 1/3 of CEOs surveyed estimate financial losses at around 80%.

## Q5: Please indicate the current cost issues most relevant to your company (select all that apply).

Answered: 145 Skipped: 28



### Insights

- Top 3 most pressing financial issues include **staffing, fixed location costs and taxes.**

#### ANSWER CHOICES

Staff costs

Fixed location costs

Taxes

Aircraft financing costs

Company financing costs

Vendor costs

ATC charges

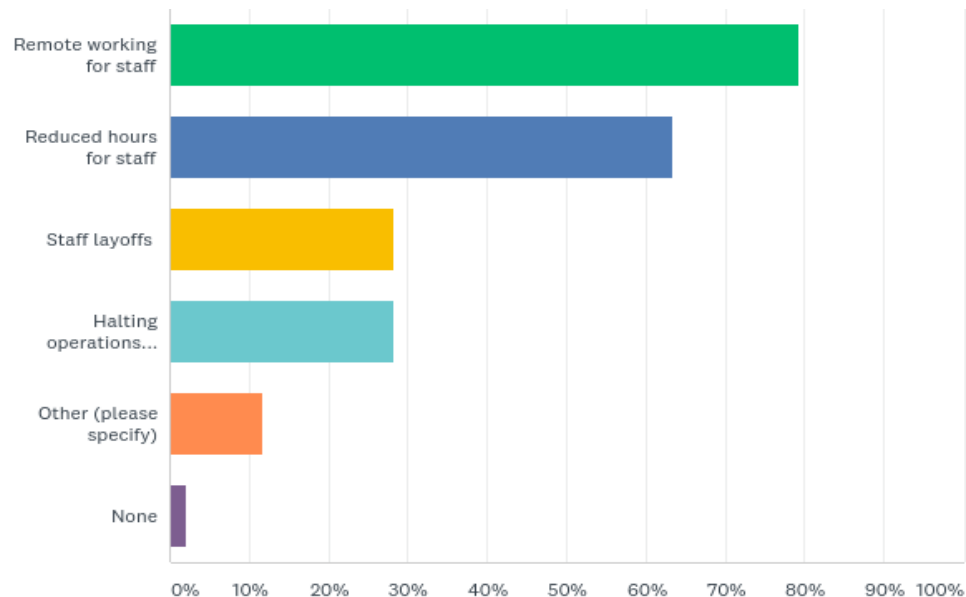
None

Other (please specify)

Total Respondents: 145

## Q6: Please indicate the measures you have implemented within your organisation to limit the impact of the COVID-19 crisis (select all that apply).

Answered: 145 Skipped: 28



### Insights

- Nearly a 1/3 of CEOs have halted operations altogether.
- Nearly a 1/3 have had to lay off employees.
- +60% have had to reduce hours for their staff.

#### ANSWER CHOICES

Remote working for staff

Reduced hours for staff

Staff layoffs

Halting operations temporarily

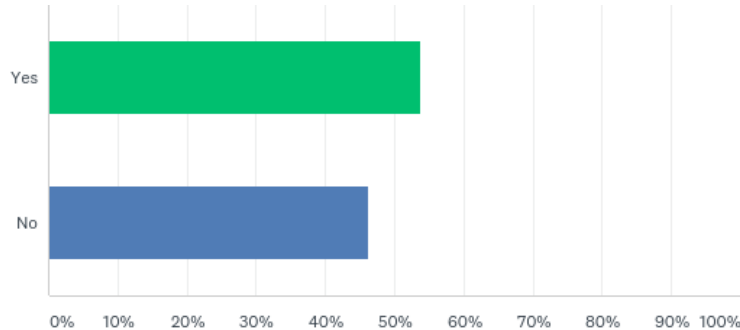
Other (please specify)

None

Total Respondents: 145

## Q7: Have you had to put staff on leave (paid or unpaid)?

Answered: 145 Skipped: 28



ANSWER CHOICES	RESPONSES	
Yes	53.79%	78
No	46.21%	67
TOTAL		145

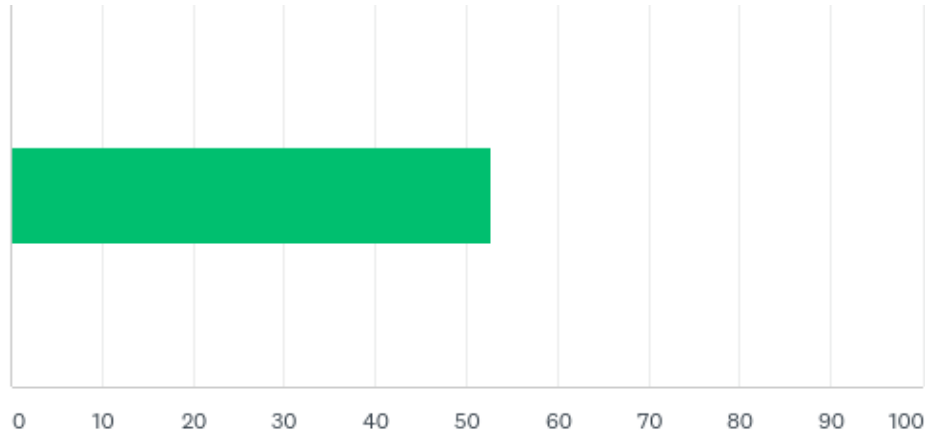
### Insights

- Over 50% of companies in the Business Aviation sector have had to put their employees on leave.



## Q8: About what percentage of your staff was put on leave (paid or unpaid)?

Answered: 78 Skipped: 95



**ANSWER CHOICES**

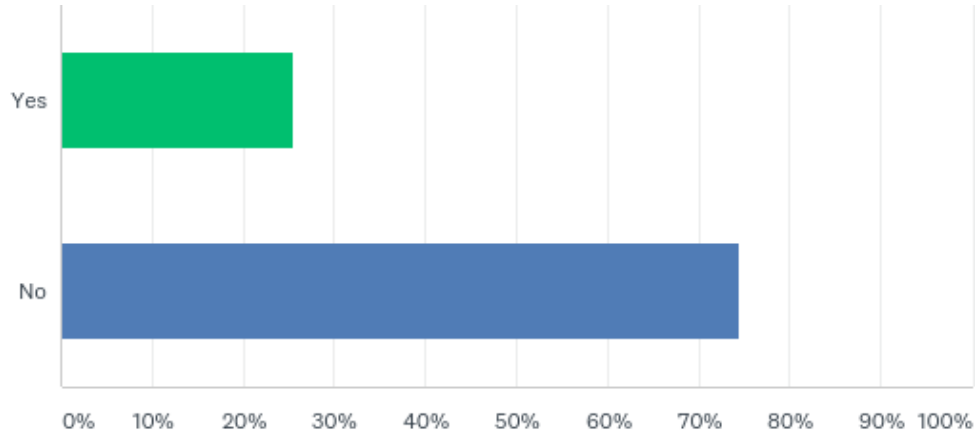
**AVERAGE NUMBER**

53

Total Respondents: 78

## Q9: Have you had to lay off staff?

Answered: 145 Skipped: 28



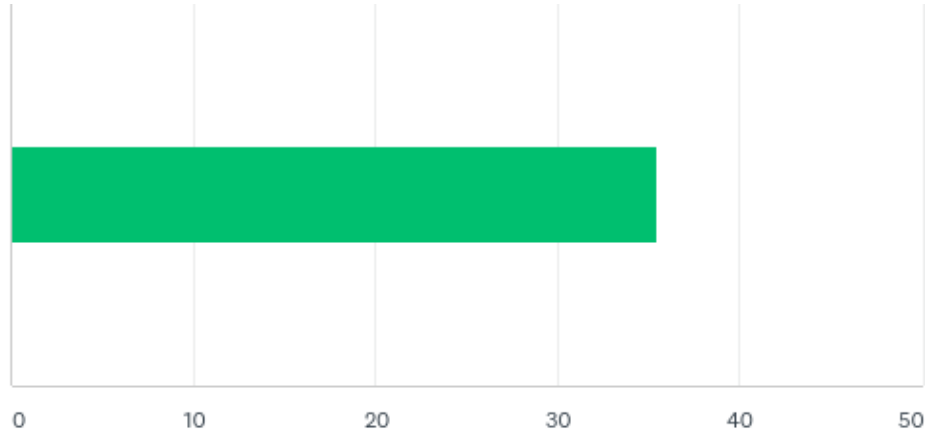
### Insights

- More than 25% of CEOs surveyed have had to lay off staff due to the crisis.

ANSWER CHOICES	RESPONSES	
Yes	25.52%	37
No	74.48%	108
TOTAL		145

## Q10: About what percentage of your staff have you had to lay off?

Answered: 34 Skipped: 139



**ANSWER CHOICES**

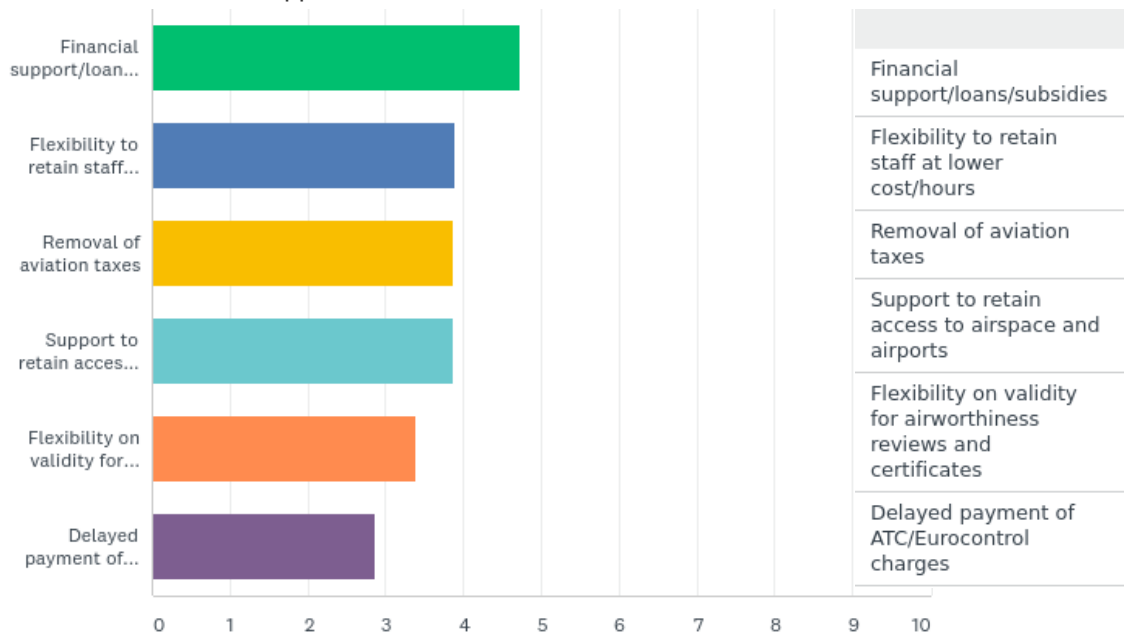
**AVERAGE NUMBER**

35

Total Respondents: 34

Q11: There are a number of support and recovery measures to consider for the business aviation sector. Please rank the following potential measures in terms of urgency and relevance to your organisation.

Answered: 125 Skipped: 48



**Insights**

- Top relief measures for the business aviation sector include **financial support, retaining access to airports, help to retain staff and suspension of aviation taxes.**

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