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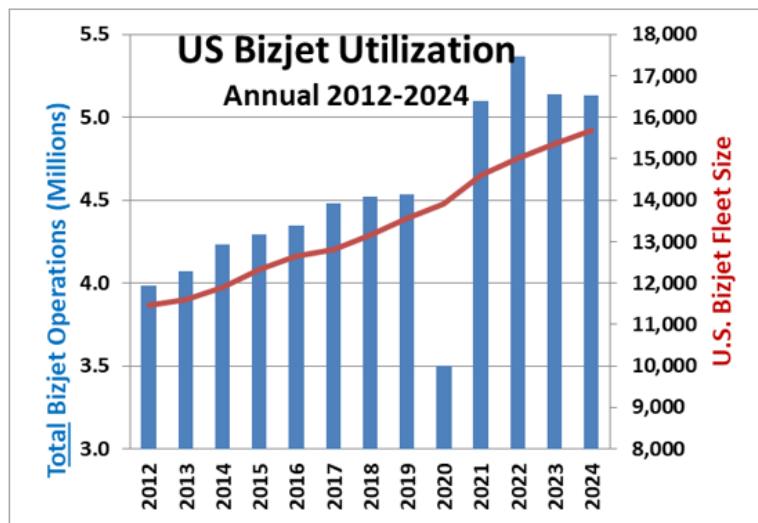
Business Jet Utilization: How Dependable An Industry Health Indicator?

The key metric used to measure business jet flight activity may not be the bellwether of industry health that the business aviation community has come to believe.

In the current business aviation trade press, repetitive headlines trumpet 2025 as the busiest year ever for global business aviation. This claim relies heavily on the metric known as business jet utilization, which is the number of monthly takeoffs and landings in the U.S., the epicenter of private jet usage.

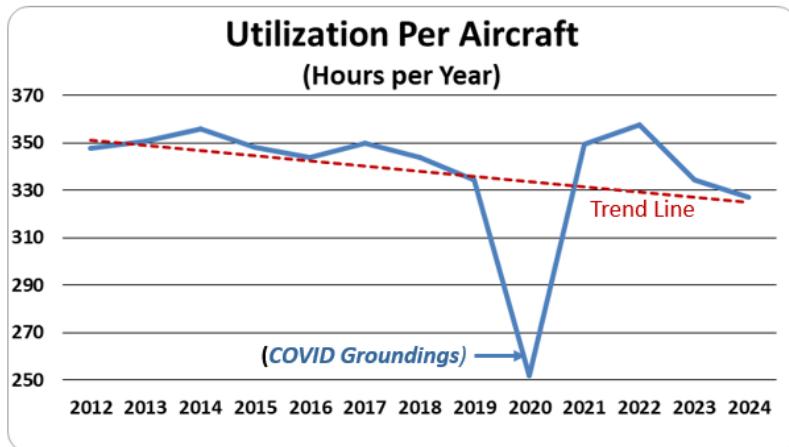
For decades, this barometer has been publicized monthly, with the notion that increased business jet utilization portends a positive outlook for the industry. The reasoning goes that higher business jet usage is indicative of a strong economy and optimistic jet users. With aircraft being used more (the theory goes), there will subsequently be more interest in buying private jets and services which propels the industry forward.

Some 700 to 800 new business jets have been delivered each year over the past 15 years, which has continuously increased the worldwide fleet size. Thus, business jet utilization has continuously trended upwards regardless of industry health since there are simply more jets taking off and landing each year. 15 years ago, there were 18,000 business jets in operation worldwide, and in 2025 nearly 25,000. Thus, it would seem rather obvious that 2025 business jet operations would be higher with 7000 more business jets being used day-to-day.



Granted, there can be short-term spikes or dips attributable in part due to the economy. An activity spike in the 2007 timeframe is attributable to hedonistic spending on private air travel as stock markets and personal portfolios soared and emerging markets prospered. However, this proved to be short-lived due to the 2008 Financial Crisis when private flying, a discretionary spend with airline alternatives, sharply decreased. Similarly, COVID temporarily tempered business jet utilization as borders were closed and business travel put on hold.

Hence, records are indeed being set for business jet usage, though it should hardly come as a surprise given that each year also sets a new record for the size of the worldwide business jet fleet. What may instead come as a surprise is that each individual business jet in this fleet is flown fewer hours each year. In 2015 the typical business aircraft was flown around 350 hours per year. In 2024 (the latest full year for which figures are available), that number decreased to just 330 hours per year. The hours flown per aircraft have now been on a steady downward trend for well over a decade, perhaps driven in part by a surge in Ultra High Net Worth Individual (UHNWI) owners who tend to use their aircraft infrequently, driving the overall usage per aircraft down.



Despite all these disparities, the monthly fleet utilization metric can still provide value. When broken down into its various constituents, one can monitor the general usage trends of aircraft owned by corporations and individuals, as well as those in charter and fractional service. This breakout has provided useful insights showing the decline of traditional flight departments as private fliers migrate to simpler and more anonymous charter and factional programs.

Business aviation utilization increasing as the fleet grows is akin to the Federal Highway Administration reporting record vehicle miles traveled each year as the total number of vehicles on the road increases. Despite this, the long-time, unquestioned embracement of the metric as an industry health barometer will be difficult to shed. As Mark Twain once said, “The less there is to justify a traditional custom, the harder it is to get rid of it.”

About Brian Foley Associates (BRiFO)

Since 2006 Brian Foley Associates (BRiFO) has helped aerospace firms and investors with strategic research, guidance and expert witness (www.BRiFO.com). Its sister company AvStrategies helps match aviation investors with great companies www.AvStrategies.com