

December 2013
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**BUSINESS AVIATION
MONITOR**



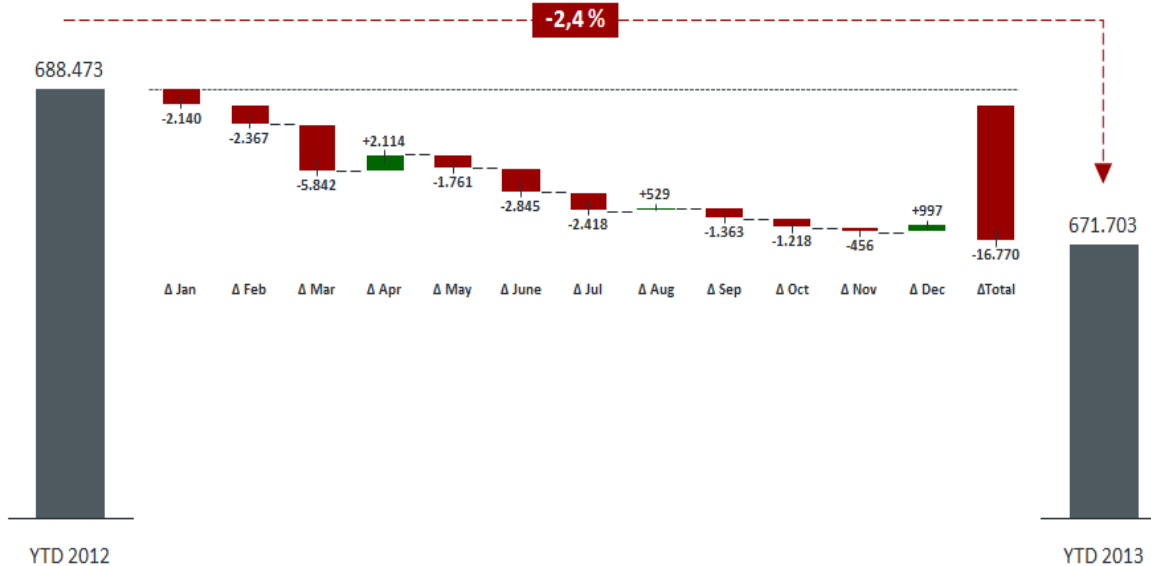
WINGX Advance is a proud member of:



Year to Date analysis of departures

With the slight growth in December, the overall decline in 2013 was 2.4%, equivalent to 16,770 fewer flights than in 2012.

THE BIG PICTURE



Note: Only Charter and Private flights are considered

THE INSIDE STORY

For the European and peripheral Nth Africa and Middle East market:

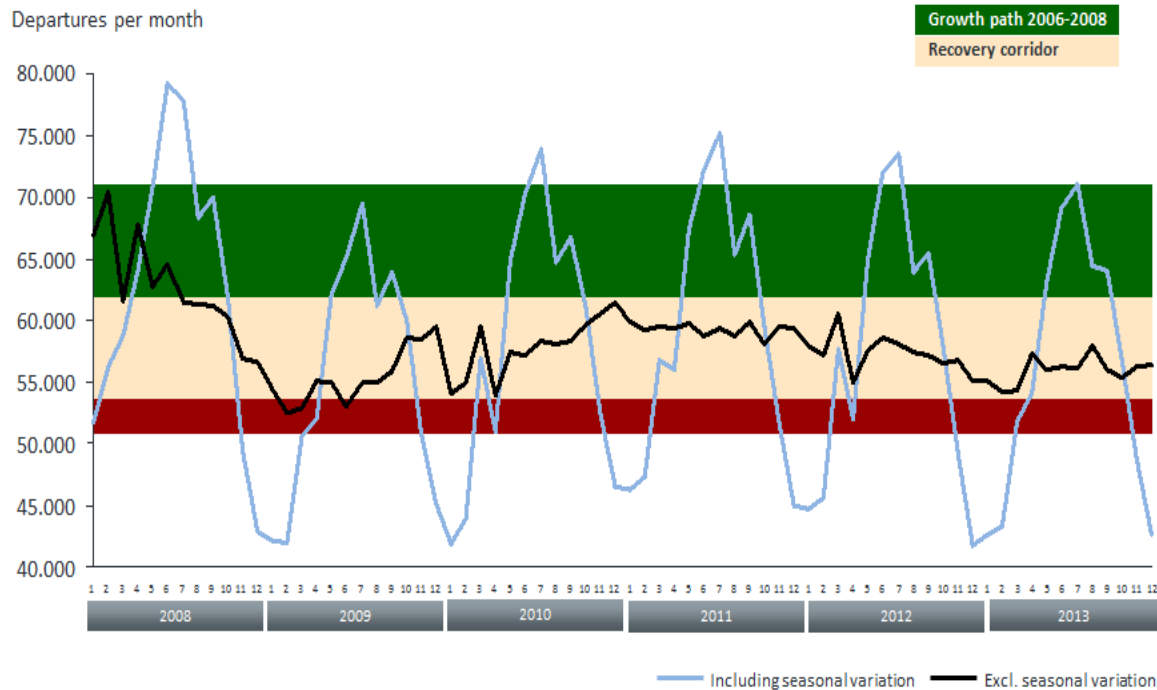
- Analysis of key factors influencing this month
- Monthly YTD analysis departures & hours
- 5 year growth path for private and charter flights
- Analysis by fleet, aircraft segment and aircraft type



Where are we in the industry cycle?

2013 avoided the slump in the 2nd half of 2012, but activity is not discernibly trending towards any kind of sustained recovery yet.

THE BIG PICTURE



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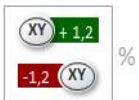
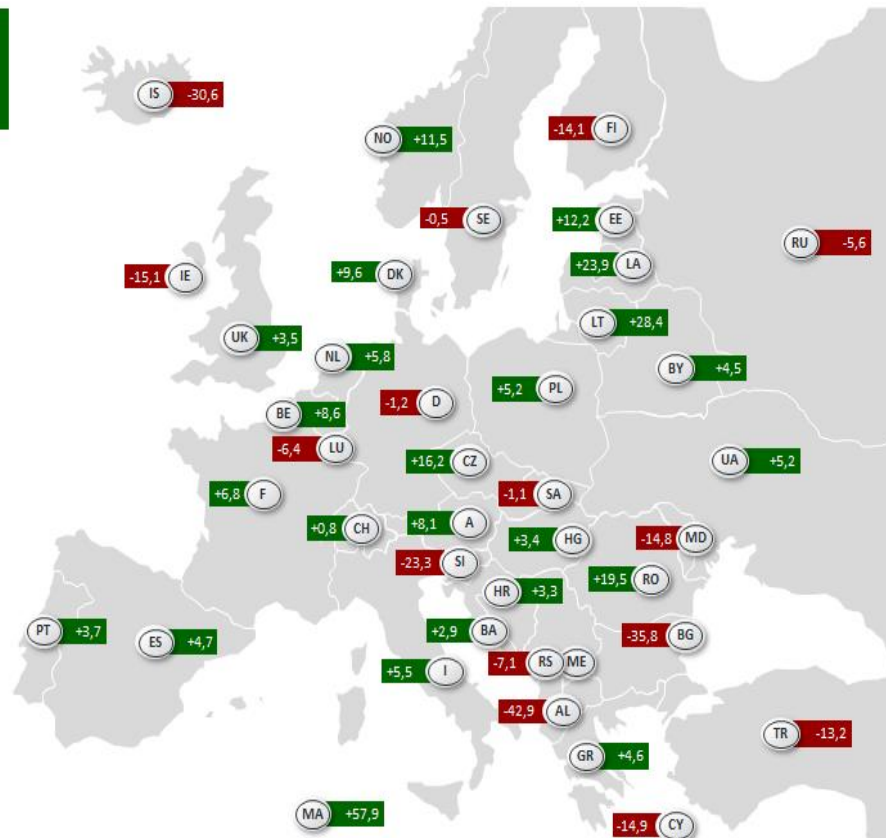


European Business Aviation departure growth in December

More green than red, as the holiday season appeared to prompt increased activity in most major markets, especially France. Notably continued declines in Russia, Germany, Turkey.

THE BIG PICTURE

Total Europe: +2,4%
December 2013 YOY



THE INSIDE STORY

For region by region analysis of business aviation activity:

- Flights gained and lost YOY and YTD
- Country market share and YOY growth of activity
- Pistons versus Jets versus Turboprops in each country
- Charter, Private and Other flights/hrs per country market

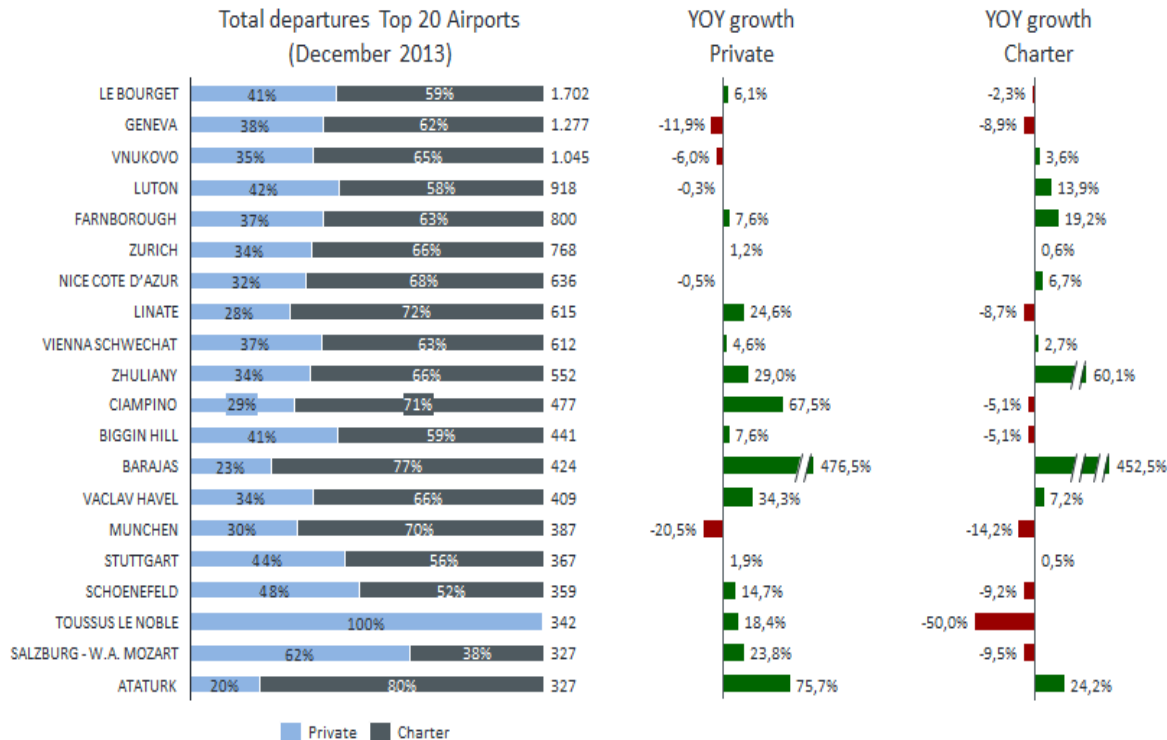


Note: Only Charter and Private flights are considered

Top 20 Airports activity by mission profile

Le Bourget showed strong growth in private flight activity in December, whereas Vnukovo, Luton, Nice gained only charter activity. Also notable gains in private at Vaclav Havel and Toussus.

THE BIG PICTURE



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THE INSIDE STORY

For Airports

- YOY activity growth by charter and private flights at 25 leading airports
- Focus on fastest growing and fastest falling airport activity throughout Europe: YOY growth and # departures
- Specific airport activity analysis: inbound & outbound connections, aircraft types, mission type, fuel, FBO traffic.



How WINGX Advance can help give your business a competitive edge

WINGX Insight Reports

- › Each of the main Key Performance Indicators in this Monitor are analyzed in more detail in our monthly Insight. The Insight is **EUR 95/month** for a quarterly subscription, with significant discounts **for a one year** subscription. Let us know if you would like to have a **free trial**.

WINGX Customized Research

- › We can adapt our aggregate market analysis to address **your specific information needs**. These may concern specific route monitoring, operator fleet analysis, fuel supply potential, FBO passenger throughput, landing fee analysis, or aircraft type performance analysis.

WINGX Survey and Forecasts

- › With our industry-leading database and industry-wide contacts, we can help you challenge assumptions with market survey, and use the feedback to explain **market trends**, anticipate **new opportunities** and build accurate **revenue forecasts**.

WINGX Strategic Consulting

- › Our team have held senior operational and commercial roles in the industry, and we can combine our experience and data sources **to advise your business** on new market opportunities, competitor threats, strategic planning and financial forecasting.



Insight
Reports



Customised
Research



Surveys &
Forecasts



Strategic
Consulting



Definitions

- › The charts illustrated in this analysis source data from national business aviation associations, Eurocontrol, and the FAA, covering 50 European, Middle Eastern and North African national territories.
- › All data analysis is carried out by WINGX Advance through our proprietary activity tracking methodology.
- › Illustrated flight activity analysis pertains to all IFR registered flights within Eurocontrol territories and between Eurocontrol territories and the rest of the world.
- › Flights within Eurocontrol territories are referred to as “EU domestic”, flights between these territories and the rest of the world are defined as “long haul”.
- › The analysis covers all single and multi engine business aviation aircraft categories: Jets, Turboprops and Pistons, equating to 281 aircraft types.
- › Coverage of business jet types used by commercial airlines is not comprehensive, but does capture, for example, Embraer Legacy (ERJ135) Bombardier 850 (CRJ200), A318 Elite, Airbus 319 and BBJ3 business aviation flights.
- › Jet aircraft activity is segmented by cabin/range capability: Airline Jet (Bizliner), Ultra Long Range, Heavy Jet, Super Mid Size Jet, Mid Size Jet, Super Light Jet, Light Jet, Entry Level Jet, Very Light Jet.
- › Utilisation of all aircraft is also categorised by Airframe OEMs. The analysis, as indicated, covers all types of private and commercial (charter) departures. We also indicate the additional activity components corresponding to “other” flights (Government, Training, Military, Medical).
- › Aircraft utilisation is measured by number of flight departures and the related number of flight hours. Our analysis does not include Overflights. We do include arrival flights from all global ICAO regions into Europe.
- › The analysis is shown for the preceding calendar month; it is compared to the previous year same month (YOY or Year on Year), and to the current total activity for the year (YTD or Year to Date).

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