

November 2013
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BUSINESS AVIATION
MONITOR



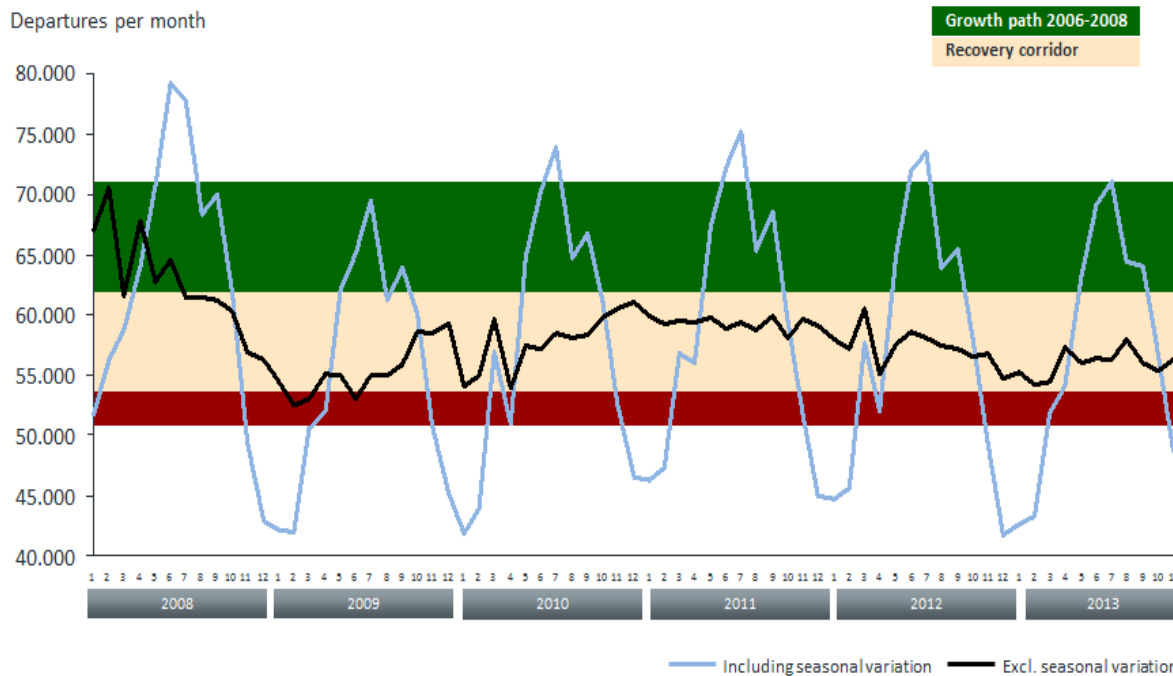
WINGX Advance is a proud member of:



Where are we in the industry cycle?

European business aviation activity is bumping along the bottom without any discernible trend towards the growth path last seen in 2008.

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

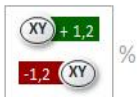
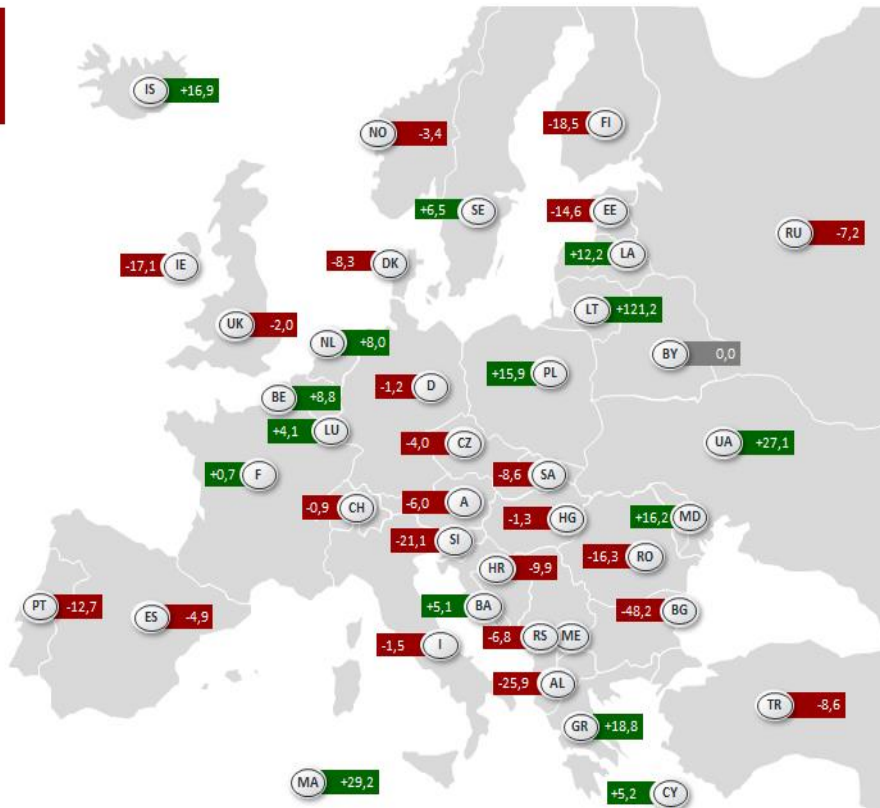


European Business Aviation departure growth in November

Leading markets all lost activity, save France, whereas there was growth in Central Europe, especially in Ukraine, Poland and the Baltics, and in Benelux and in Sweden.

THE BIG PICTURE

Total Europe: -0,9%
November 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



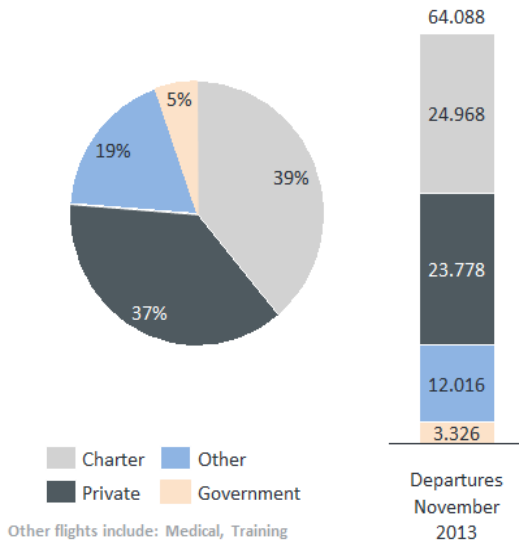
Note: Only Charter and Private flights are considered

Activity by flight filing (mission type), November 2013

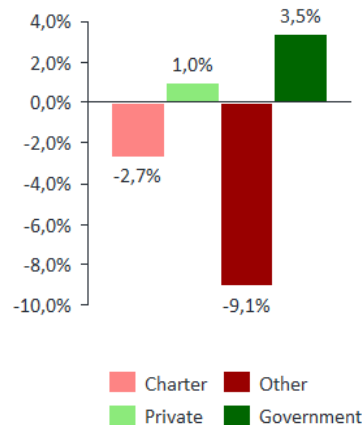
Charter activity, which narrowly exceeds private, slipped 2.7% YOY; government flights increased strongly; private flights inched ahead of 2012 activity.

THE BIG PICTURE

Distribution of departures



YOY growth



THE INSIDE STORY

For region by region:

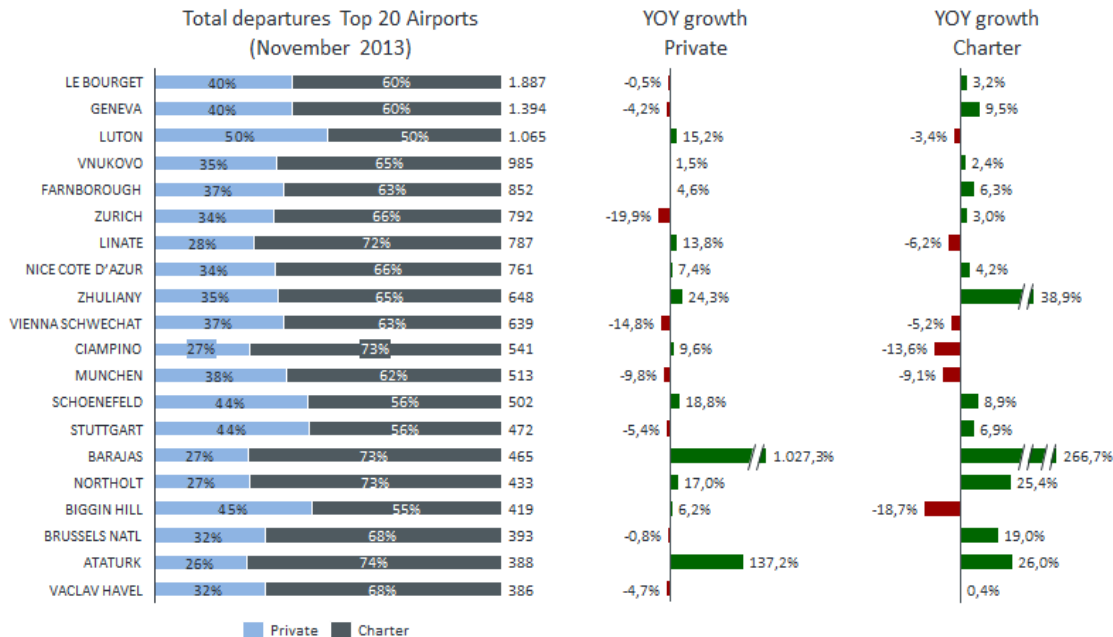
- Each of last 12 months' private and charter activity
- Analysis of sector length and growth by aircraft size segment and seat capacity segment
- Distinction between intra and outbound Euro region activity
- Specific focus by aircraft segment and type



Top 20 Airports activity by mission profile

It was mostly a positive month for charter traffic with gains at Le Bourget, Geneva, Farnborough, and big increases at Northolt, Brussels and Ataturk.

THE BIG PICTURE



Note: Only Charter and Private flights are considered

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).

DISCLAIMER:

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