



**CORPORATE JET INVESTOR LONDON
2023**

6 - 8 February 2023 | The Landmark London

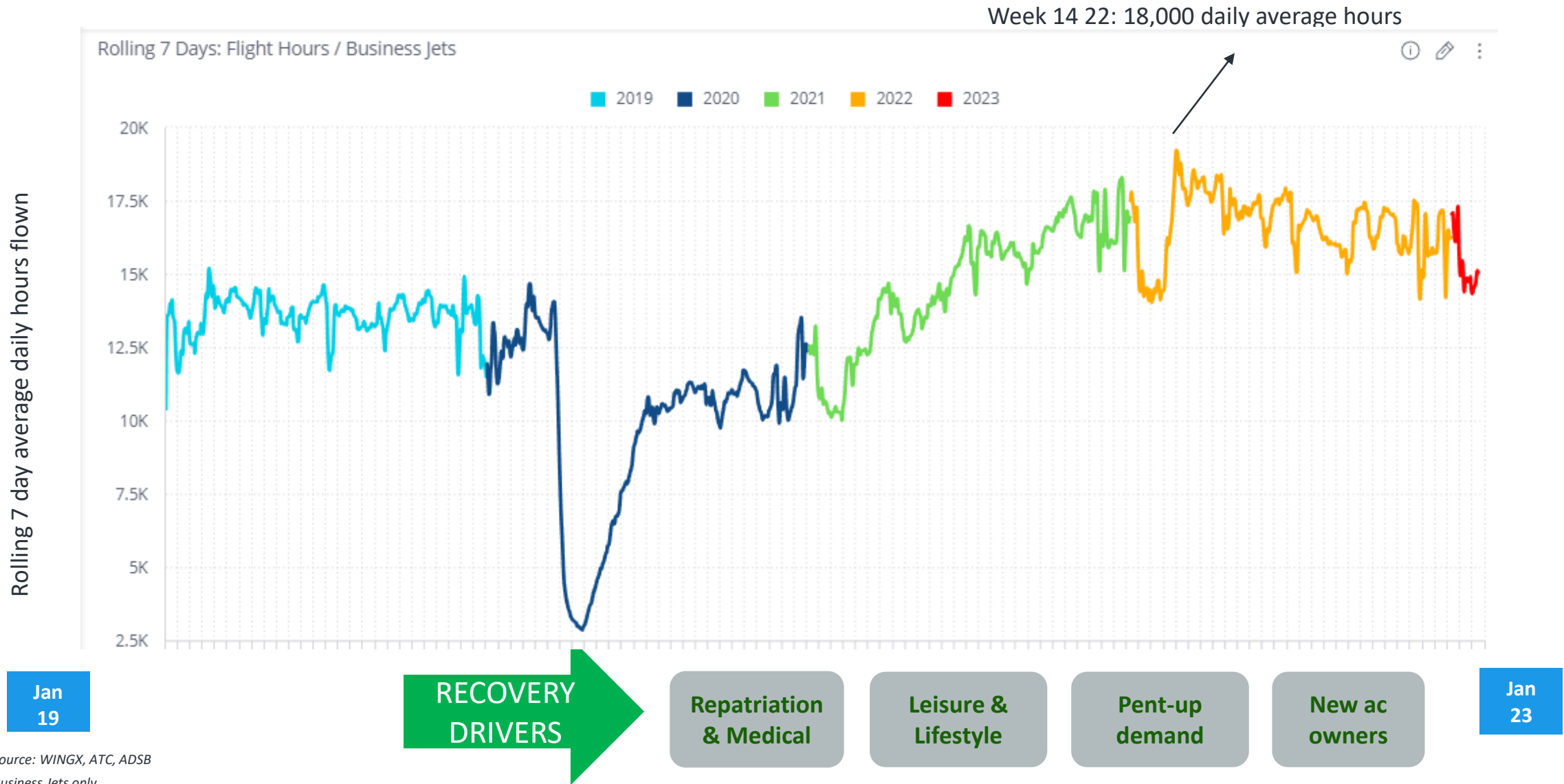
CorporateJetInvestor
LONDON 2023
6 - 8 February
The Landmark London
#CJILONDON

WINGX
*Actionable
Business
Intelligence*

IS THE MARKET TURNING?

Hamburg, Jan 2023

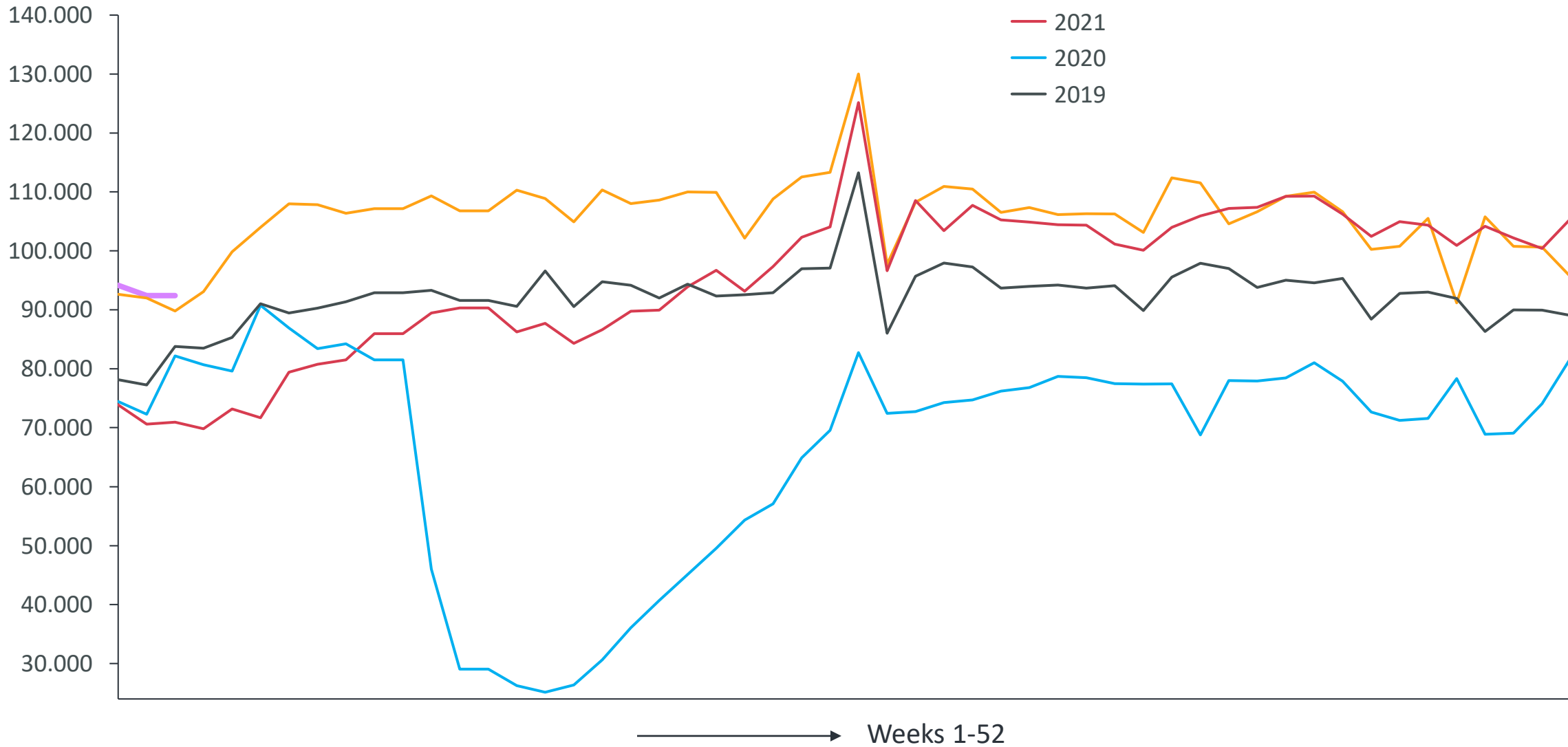
Worst-ever slump; rapid recovery, then record-breaking 2022



Source: WINGX, ATC, ADSB
Business Jets only

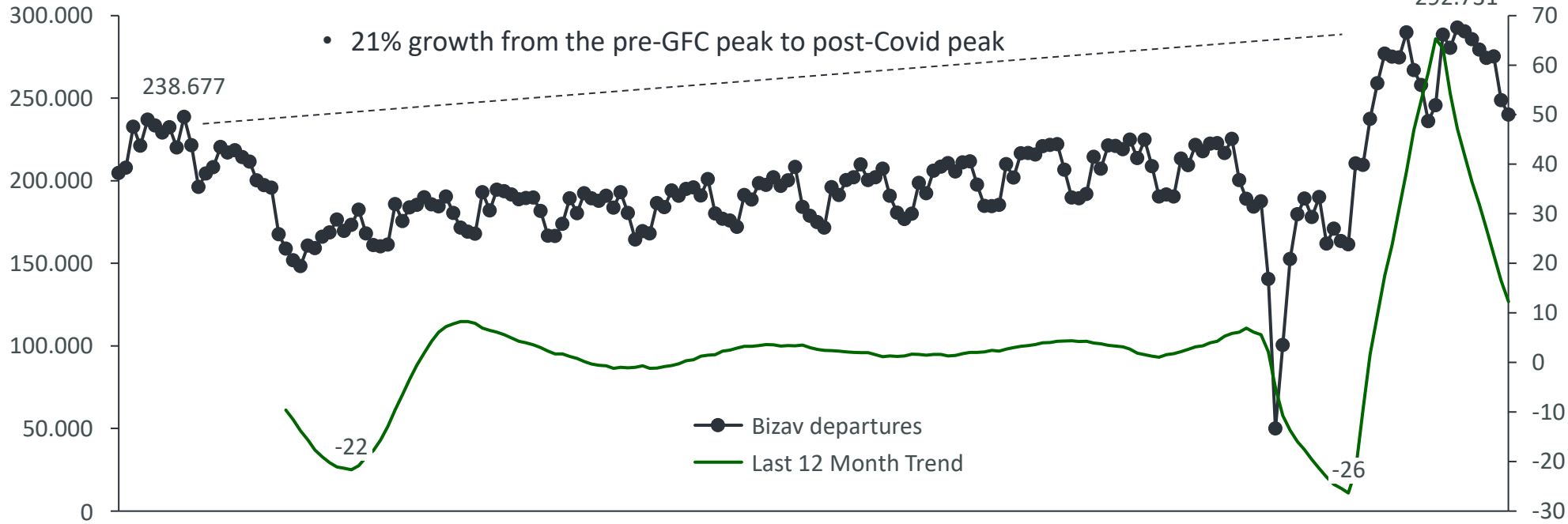
In context of the last few years...

Bizjet sectors flown per week

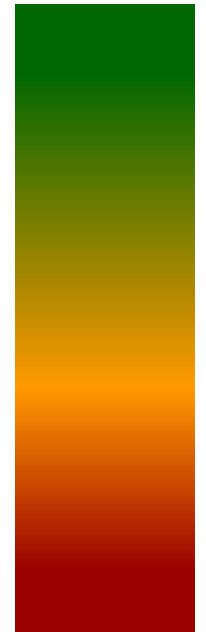


In context of the last 15 years

Bizjet sectors per month, North America and Europe



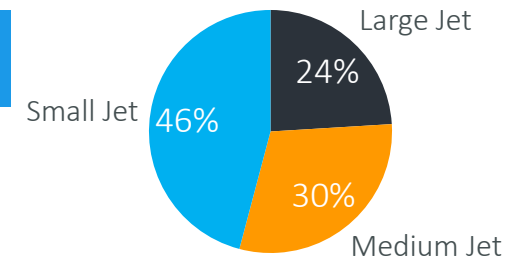
?



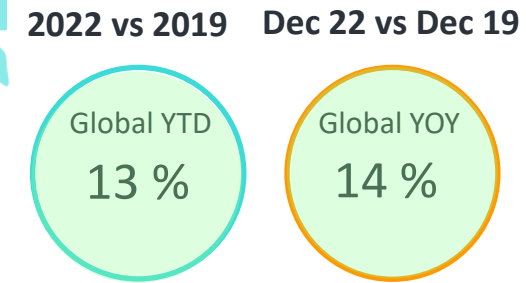
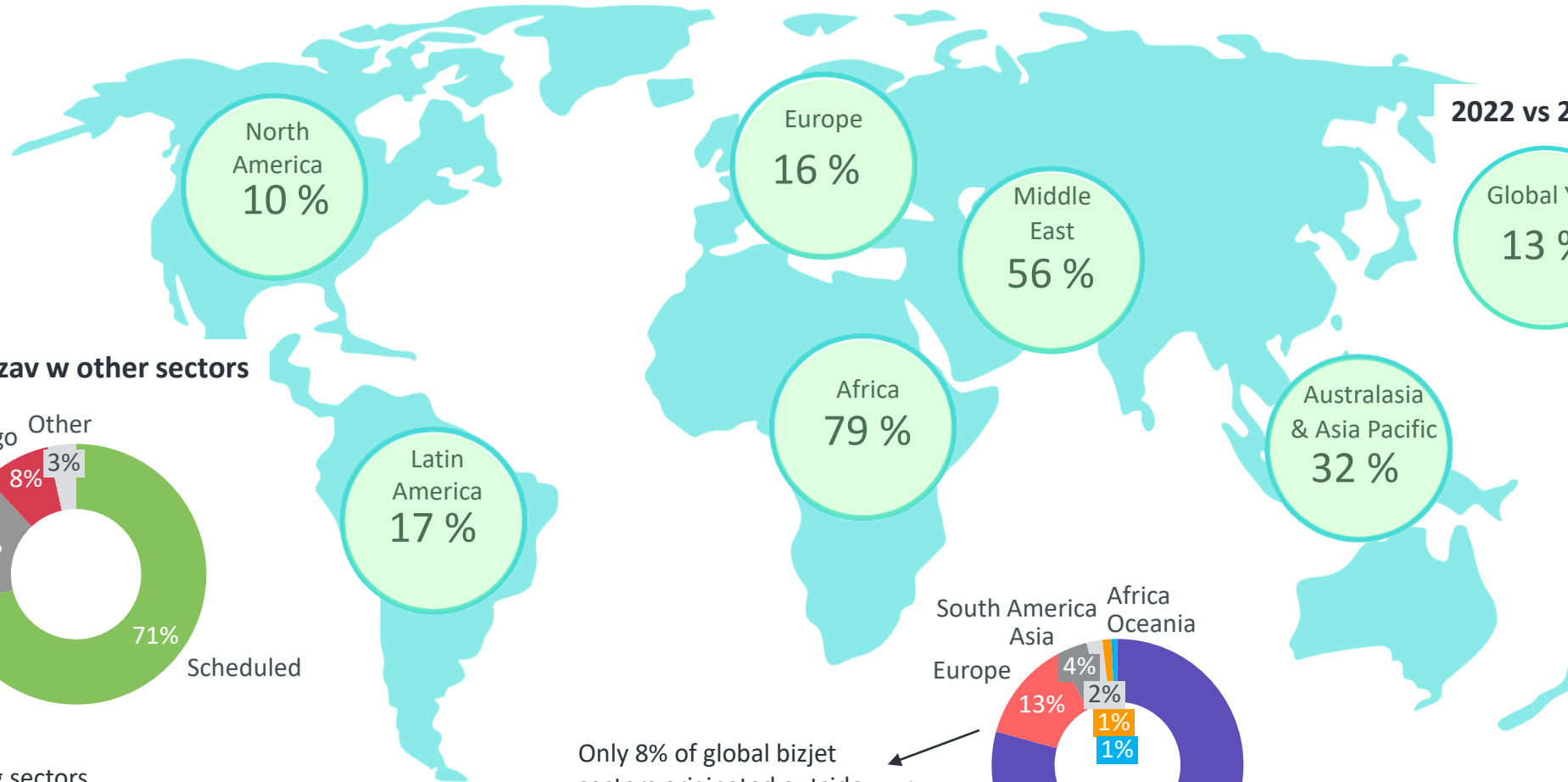
Jan 2007

2014

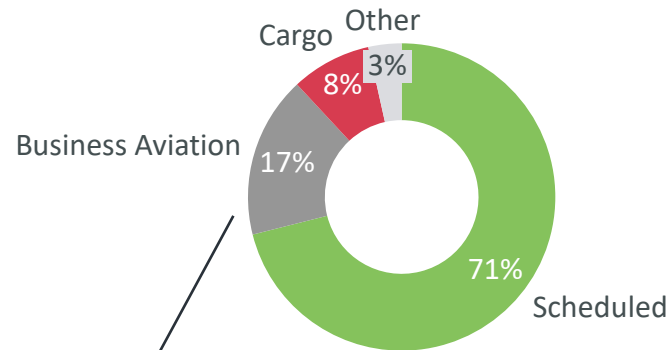
Dec 22



Regional jet & prop distribution and trends (Jan-Dec-22 vs Jan-Dec-19)

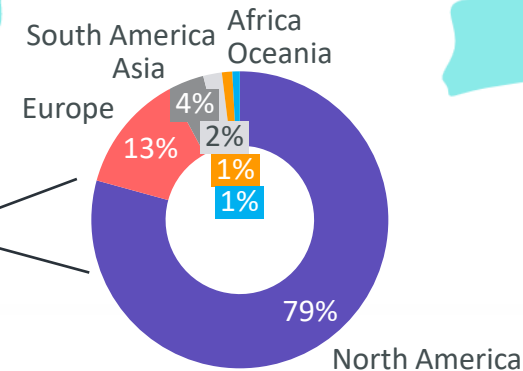


Comparing Bizav w other sectors



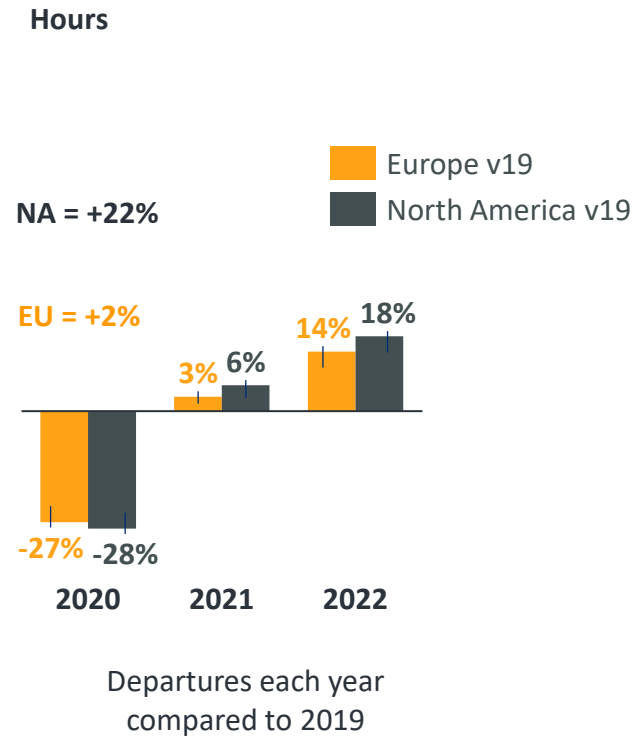
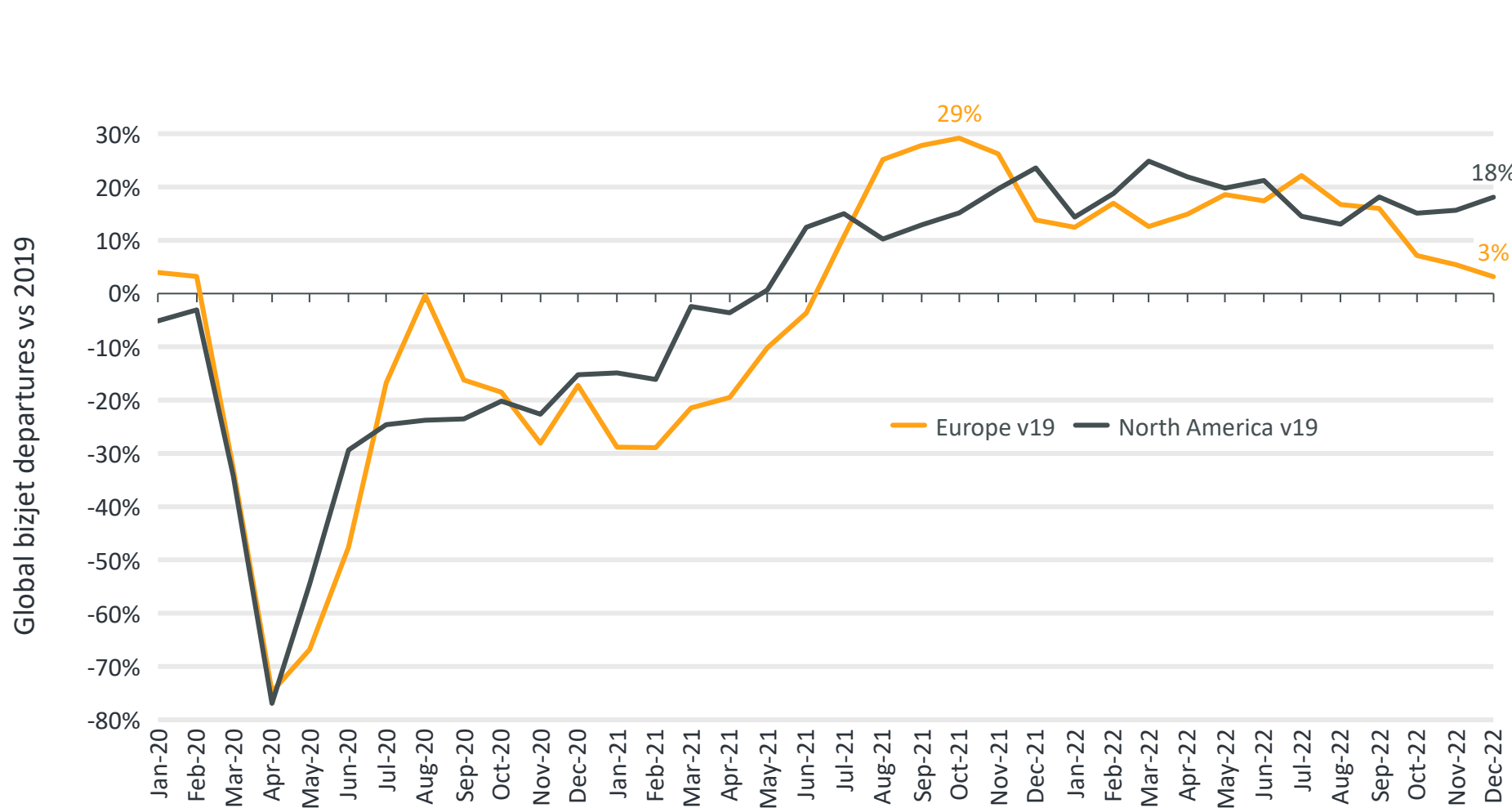
17% of all fixed wing sectors flown in 2022 were bizav
12% pre-pandemic

Only 8% of global bizjet sectors originated outside Europe and North America



*Business aviation = non-scheduled flights on business jet and turboprop aircraft types, see Definitions for more detail

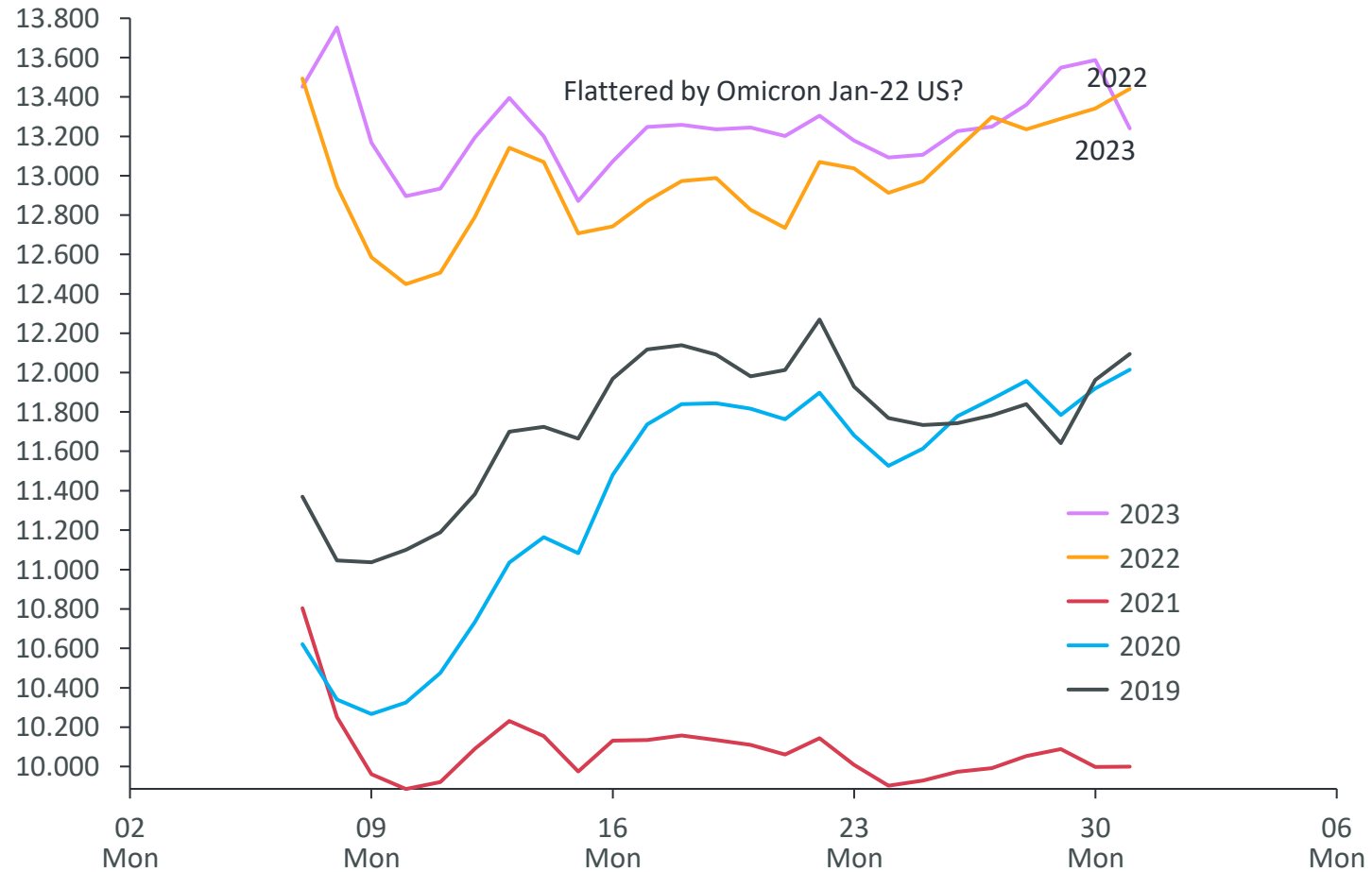
North America has sustained gains, whereas Europe is tapering



Wobbles in the last few months?

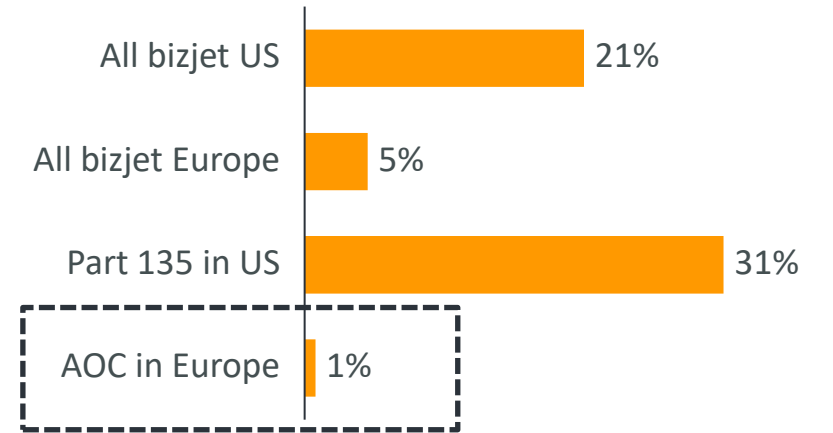
January 1-31, 2023

Global bizjet sectors



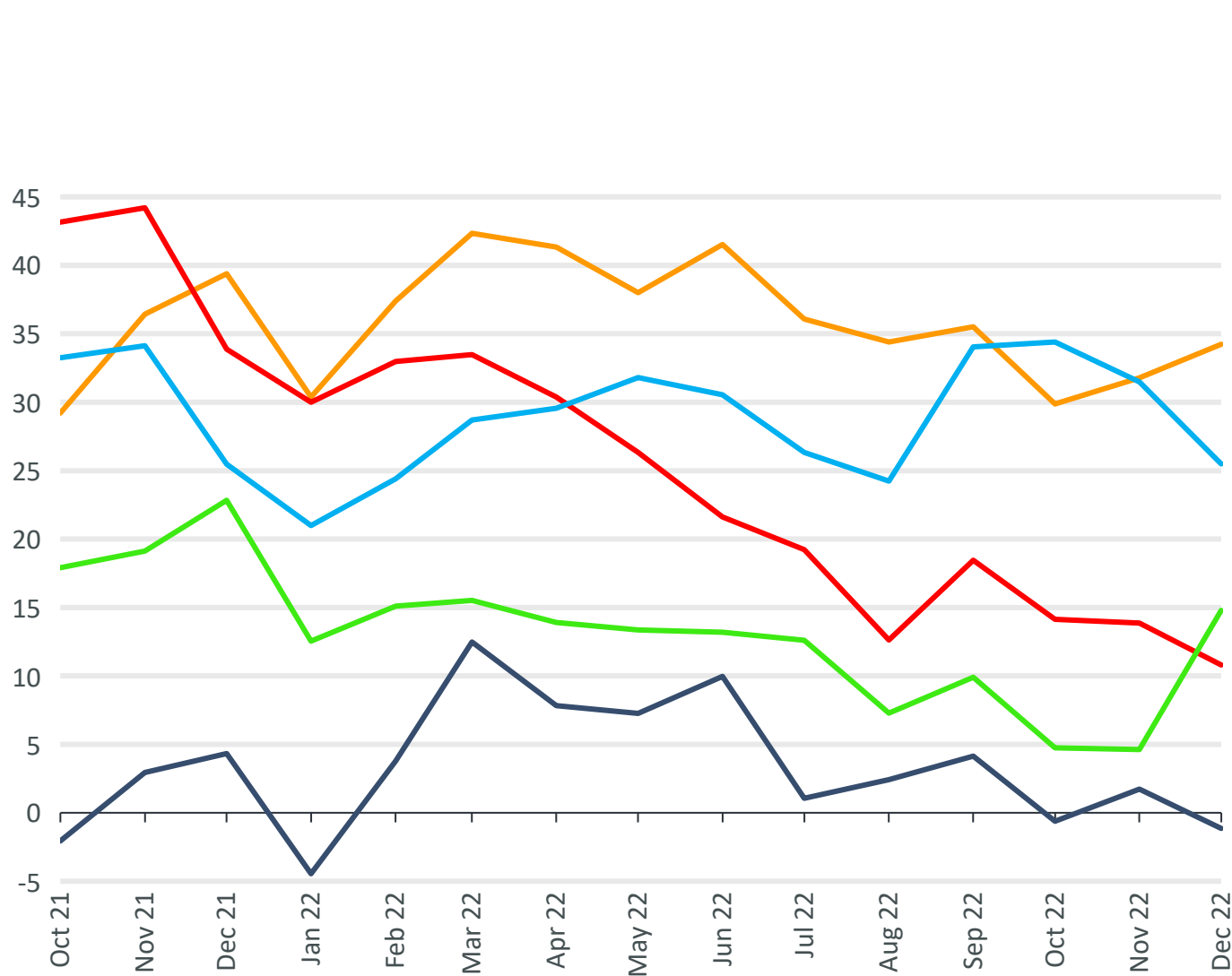
→ Daily flights Jan-Feb 2023

Nov-Feb 22/23 vs Nov-Feb 19/20



Downward trends in bizjet growth rates vs 2019

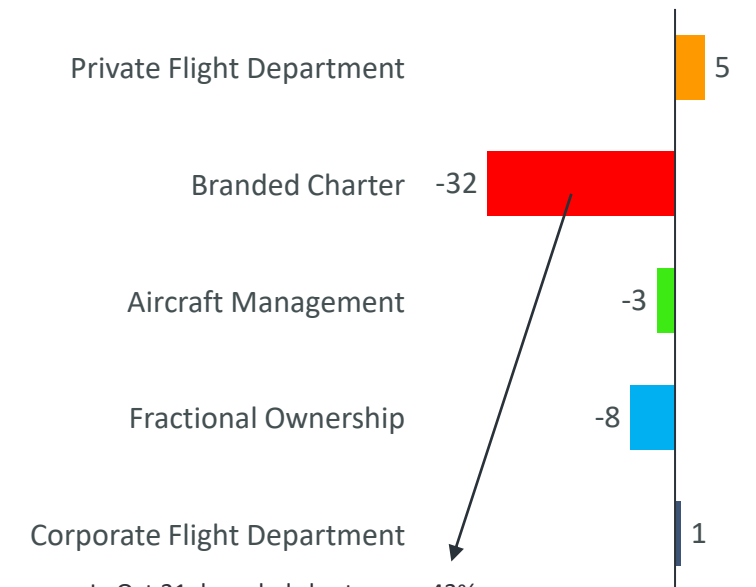
% change compared to same months in 2019



- Private Flight Department
- Branded Charter
- Aircraft Management
- Fractional Ownership
- Corporate Flight Department

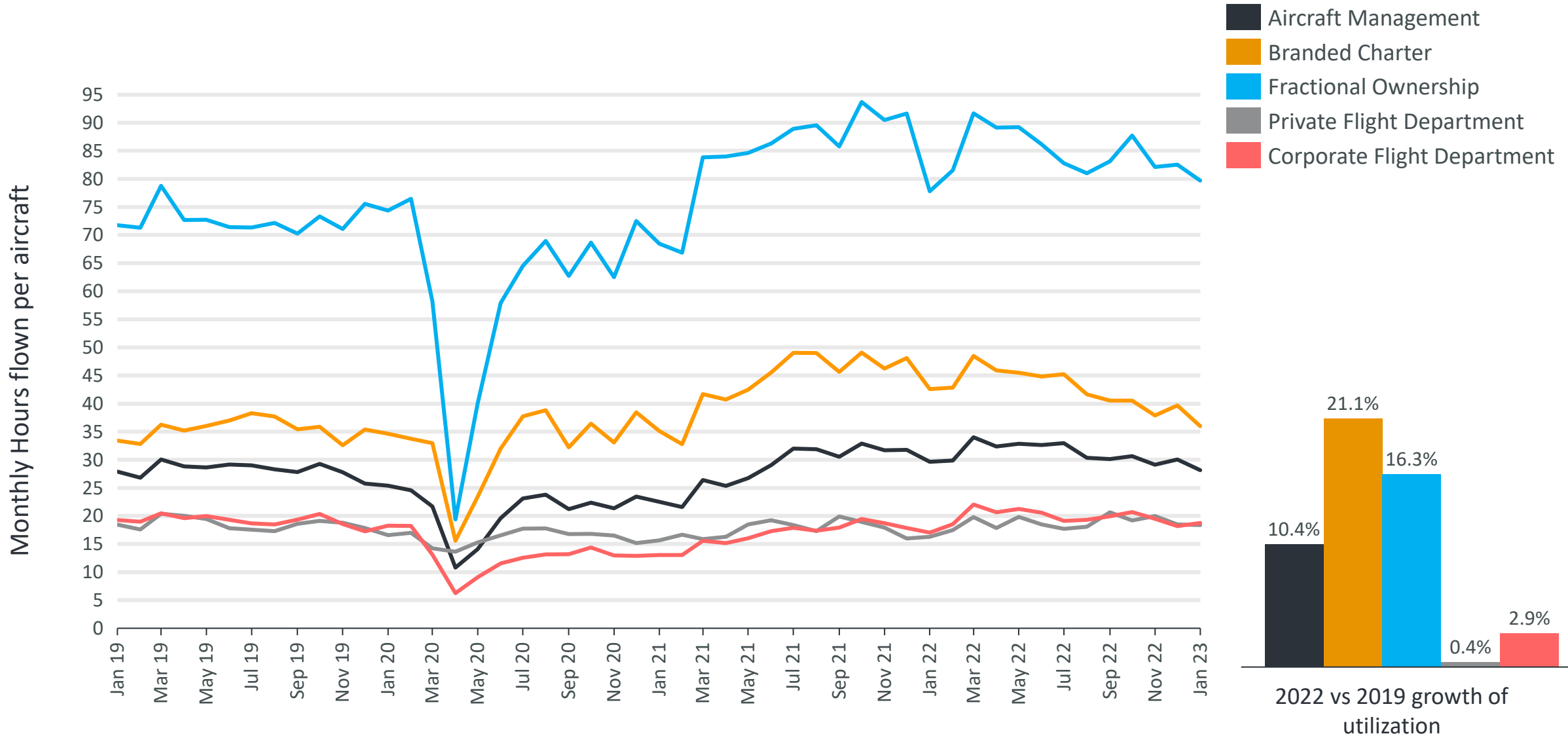
Change in growth rates

Change in growth trend vs 2019, between Oct-21 and Dec-22



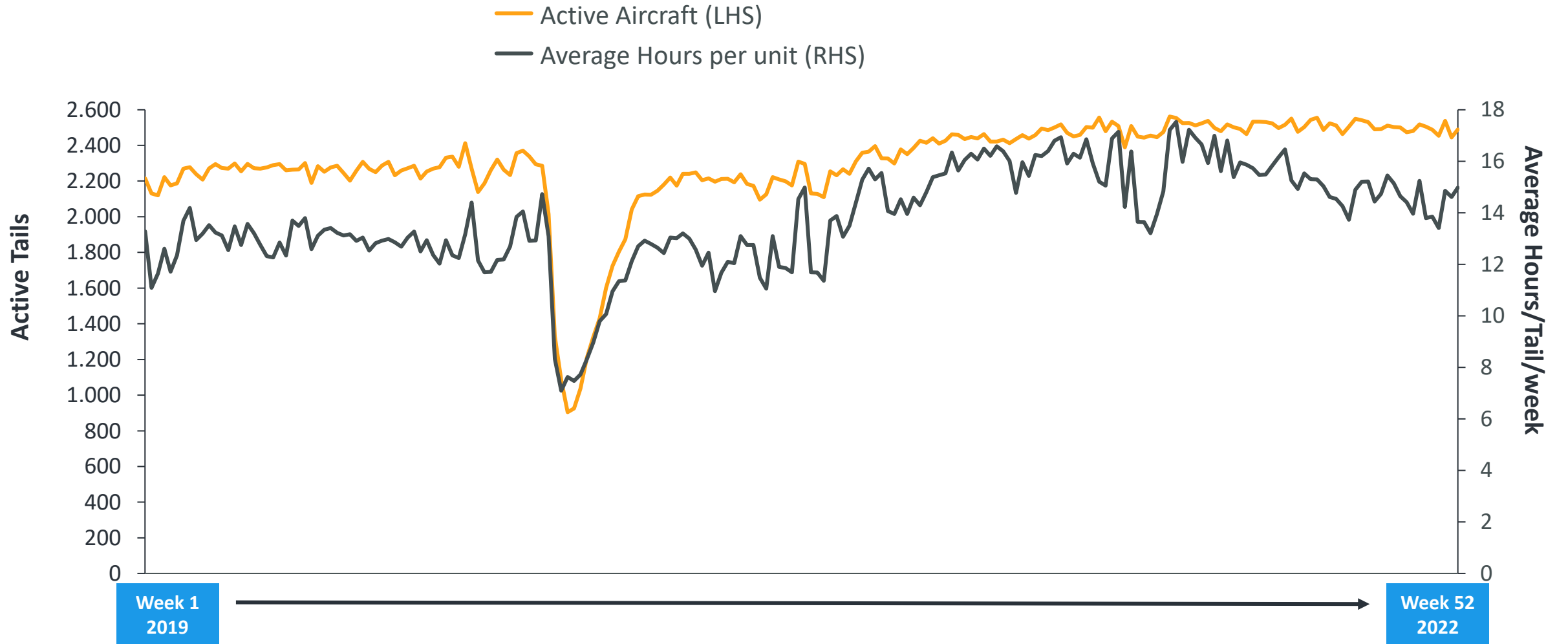
In Oct 21, branded charter was 43% up on same month in 2019; by Dec-22, branded charter was up 11% compared to same month 2019.

Utilisation is more solid in Fractional than Charter (upgrade?)

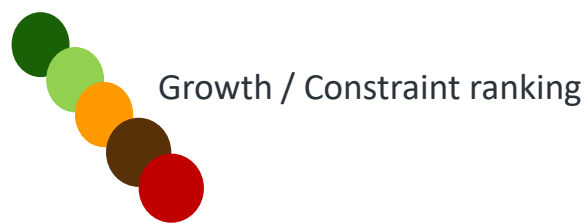


Source: WINGX, ATC, ADSB Business Jets only

Unit Utilization evidently falling: Branded Charter & Fractional

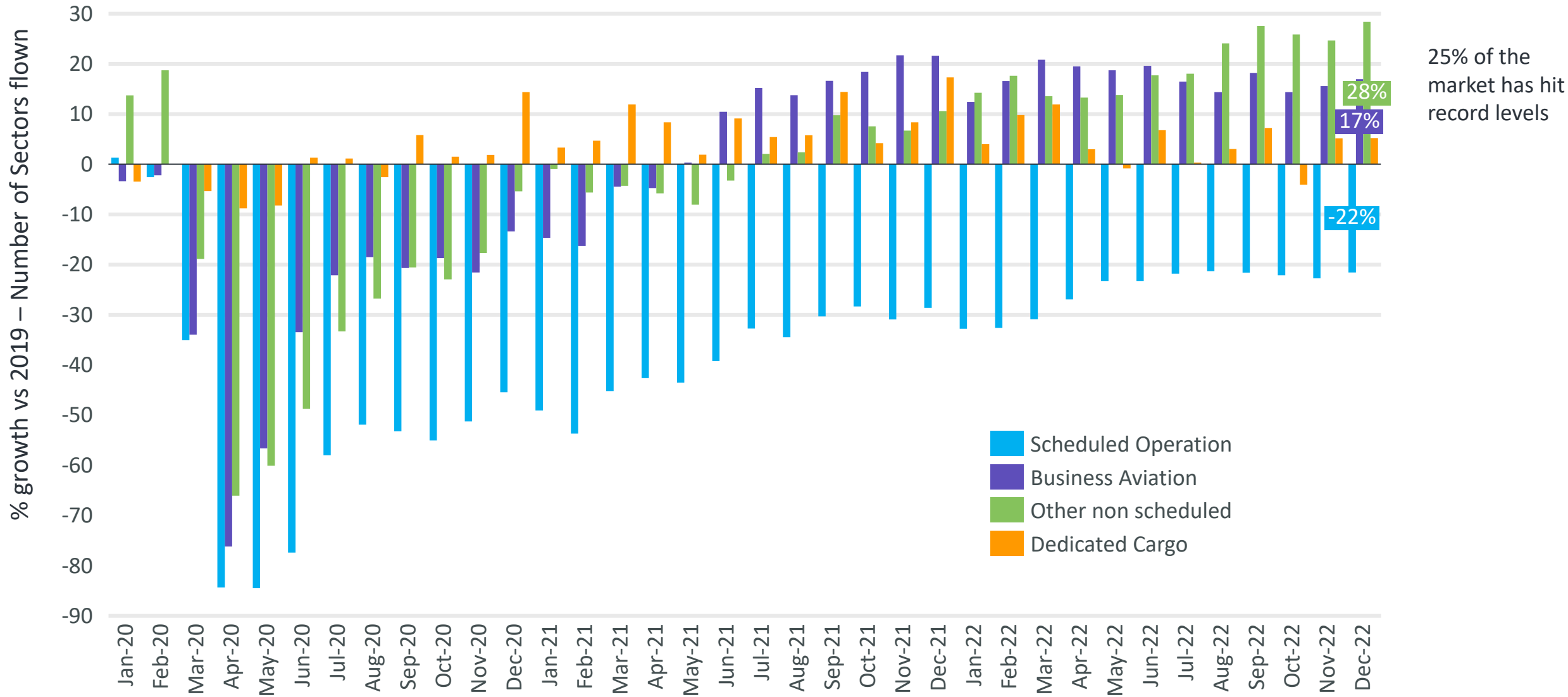


Outlook for 2023: Select Factors



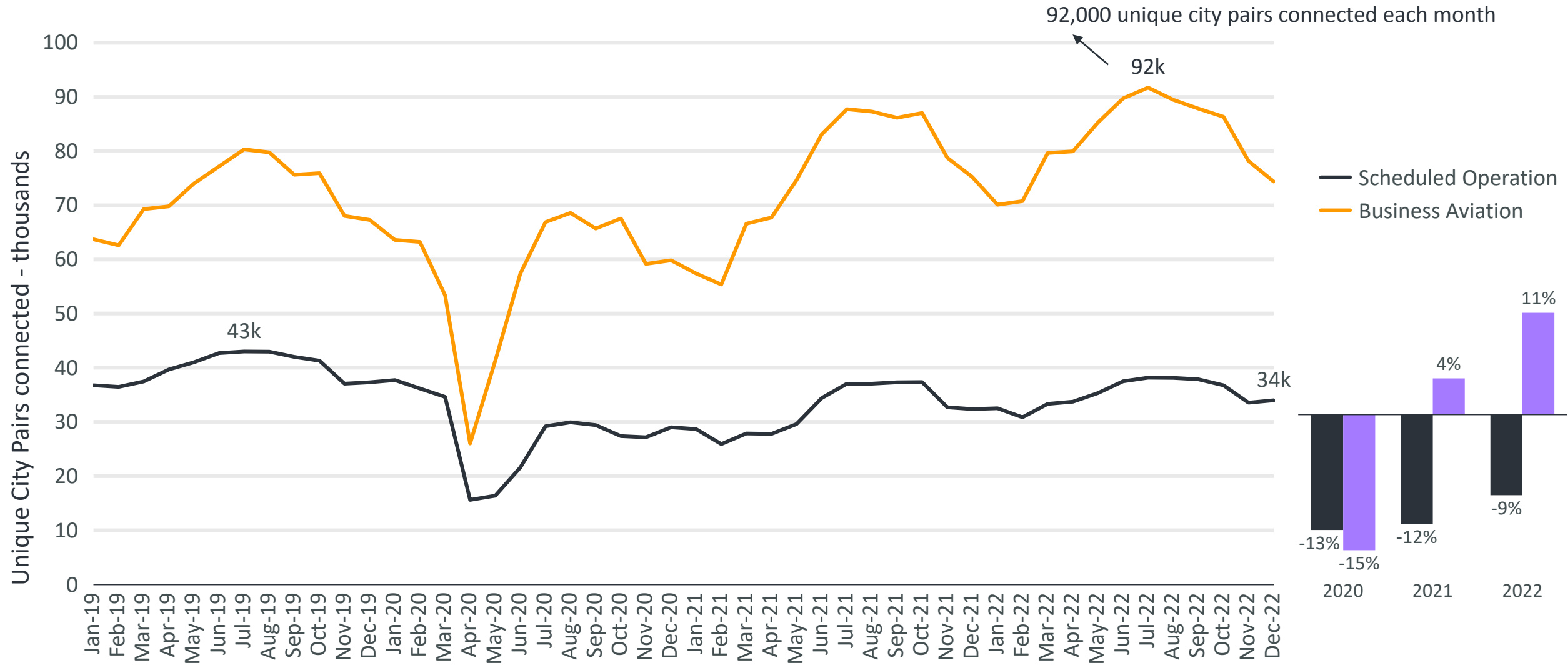
KEY FACTORS	Evidence & Insights?	2023 outlook	Impact on business aviation traffic
Health hazard shared spaces	Fundamental rethink on health safety, possible pandemic recurrence	Fading but still present	
Macroeconomic instability	Inflation, market volatility and rising energy prices probably = recession	Not going away but may be a soft landing	
Eroded scheduled connectivity	Scheduled airline network and connectivity not close to recovery	Remains, especially Regional	
Ultra wealth creation	Macro indicators less positive but UHNWI cycle still upwards	Moderating but important	
Aviation usage optics	Not yet GFC-toxic but green agenda & unemployment imminent	Likely to get more severe	

Business jet activity in wider context; unscheduled up, scheduled still down



Source: WINGX, ATC, ADSB Business Jets only

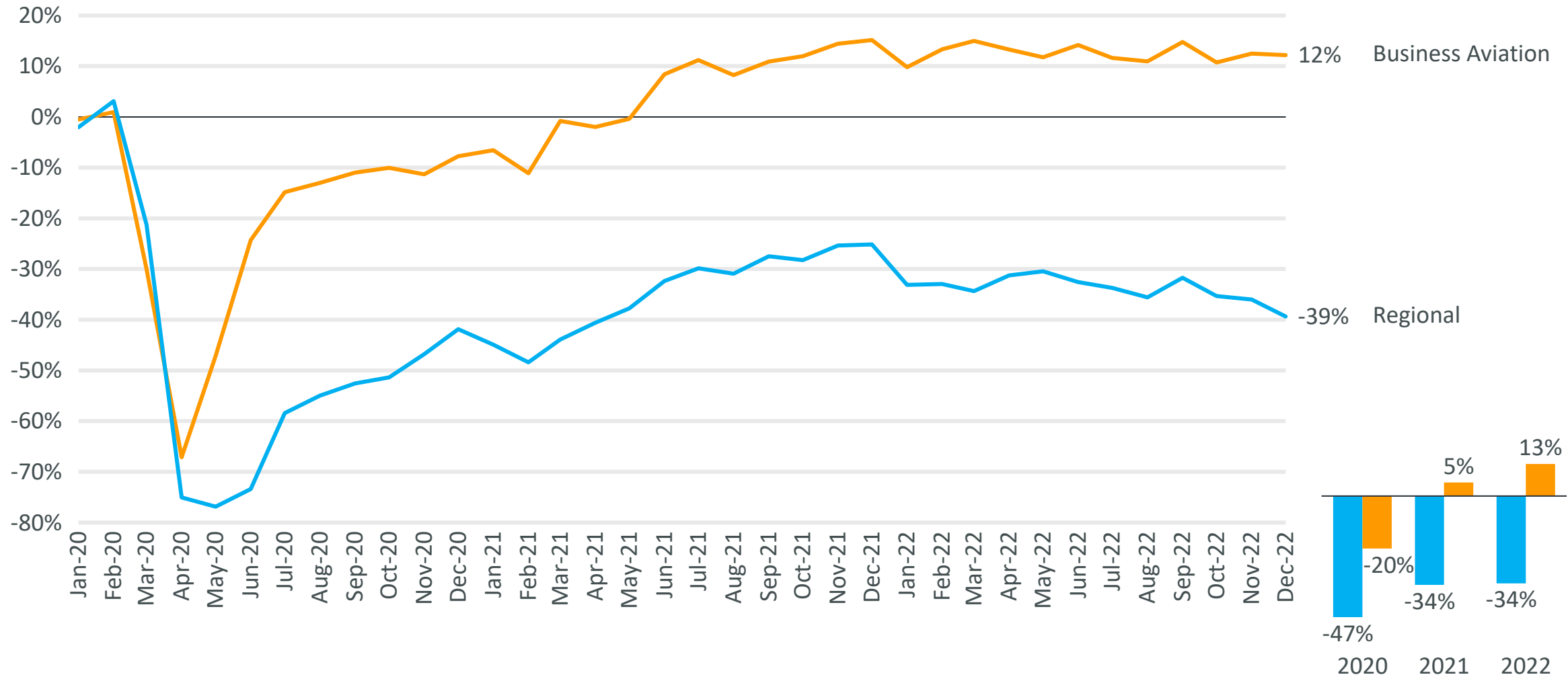
Business aviation in wider context; bizav connectivity advantage has increased



Source: WINGX, ATC, ADSB Business Jets only

Eroded regional airline connections offer bizav strong competitive advantage

% Growth vs 2019 on Regional Network's Flights

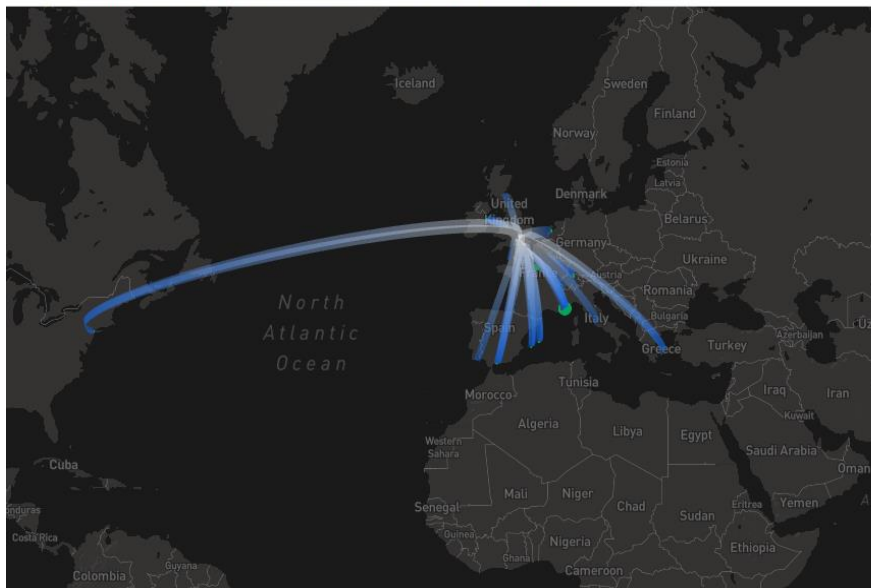


Business Jets only Regional Network includes a selection of 14k City pairs worldwide

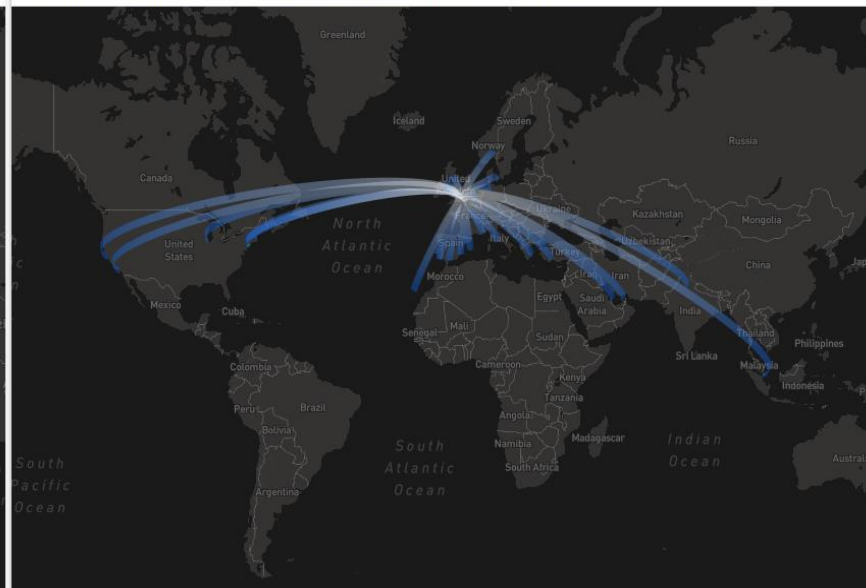
Outbound London in 2022 vs 2019: bizjet deps +20%, airlines -25%

City Flow (from / to metro area)	Business Aviation						Scheduled Operation					
	Flights	Flights: Growth vs 3 yrs ago	Avg. Flights per Week	Operated Airport Pairs	Operated Seats	Seats: Growth vs 3 yrs ago	Flights	Flights: Growth vs 3 yrs ago	Avg. Flights per Week	Operated Airport Pairs	Operated Seats	Seats: Growth vs 3 yrs ago
London (GB) - Paris (FR)	2,955	21%	16	12	47,866	22%	6,181	-28%	117	9	117,070	-22%
London (GB) - Nice	1,545	27%	18	11	37,949	9%	4,129	-29%	78	5	82,630	-27%
London (GB) - Geneva (CH)	1,867	20%	15	11	23,714	6%	7,728	-27%	140	5	303,163	-23%
London (GB) - Milan (IT)	1,149	52%	22	28	13,193	21%	7,966	-38%	150	10	1,254,425	-38%
London (GB) - Zurich	1,147	42%	22	14	13,060	1%	5,808	-31%	111	5	61,220	-33%
London (GB) - New York	1,070	4%	20	33	21,108	-3%	9,000	-11%	170	5	3,263,282	-21%
London (GB) - Dublin (IE)	1,000	49%	19	14	10,510	16%	14,596	-25%	275	5	2,443,945	-25%
London (GB) - Amsterdam (NL)	975	37%	18	16	10,196	25%	12,103	-37%	228	5	1,099,415	-42%
London (GB) - Mallorca	775	64%	15	11	7,760	68%	5,274	-7%	100	6	67,911	-12%

Business Aviation: Top X Airport Pairs (growth trends vs previous year's period)



Scheduled Aviation: Top X Airport Pairs (growth trends vs previous year's period)



London-Milan
+52% bizjet
-38% airline



WINGX ADVANCE GMBH

Lilienstrasse | 11 | 20095 Hamburg | Germany

Phone =49-40-32-84-69-78

E-mail: office@wingx-advance.com

Follow us on twitter: [@wingxbizav](https://twitter.com/wingxbizav)

[www.wingx-advance.com /](http://www.wingx-advance.com/)

MAKING AEROSPACE INFORMATION INTELLIGENT

