



EMERGING TRENDS IN BUSINESS AVIATION

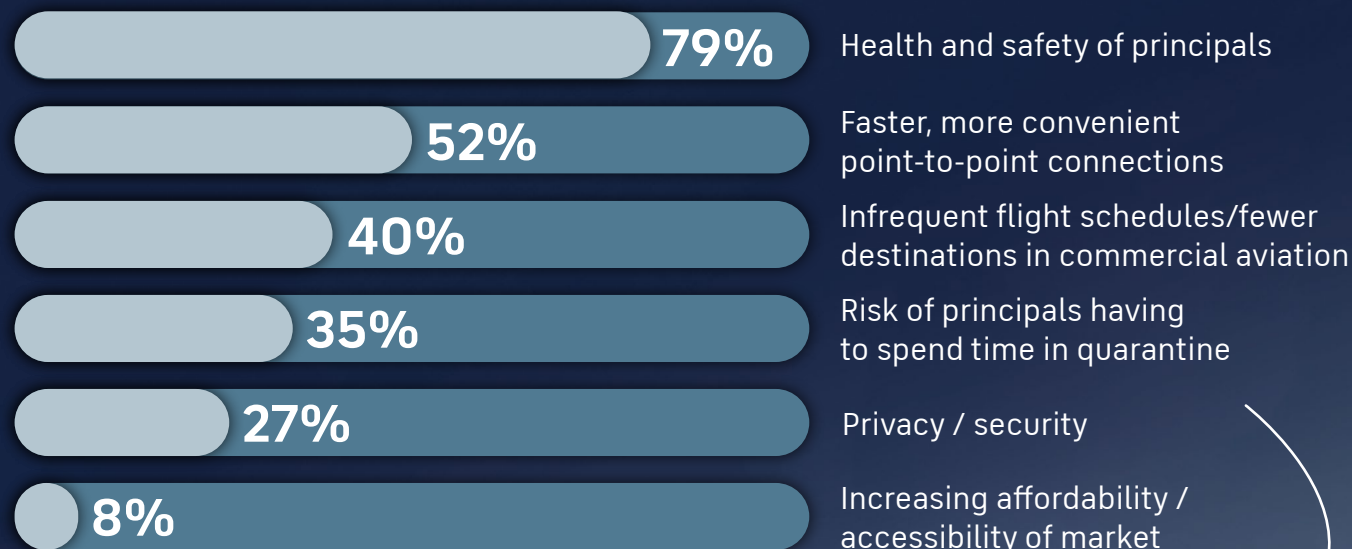
Inmarsat Aviation & CJI Survey 2020

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PRINCIPALS' HEALTH AND SAFETY CONCERNS ARE DRIVING GROWTH IN DEMAND

What do you believe are the key reasons for an uptick in business aviation?



What will be key areas of focus in a post-pandemic world (to retain customer growth)?



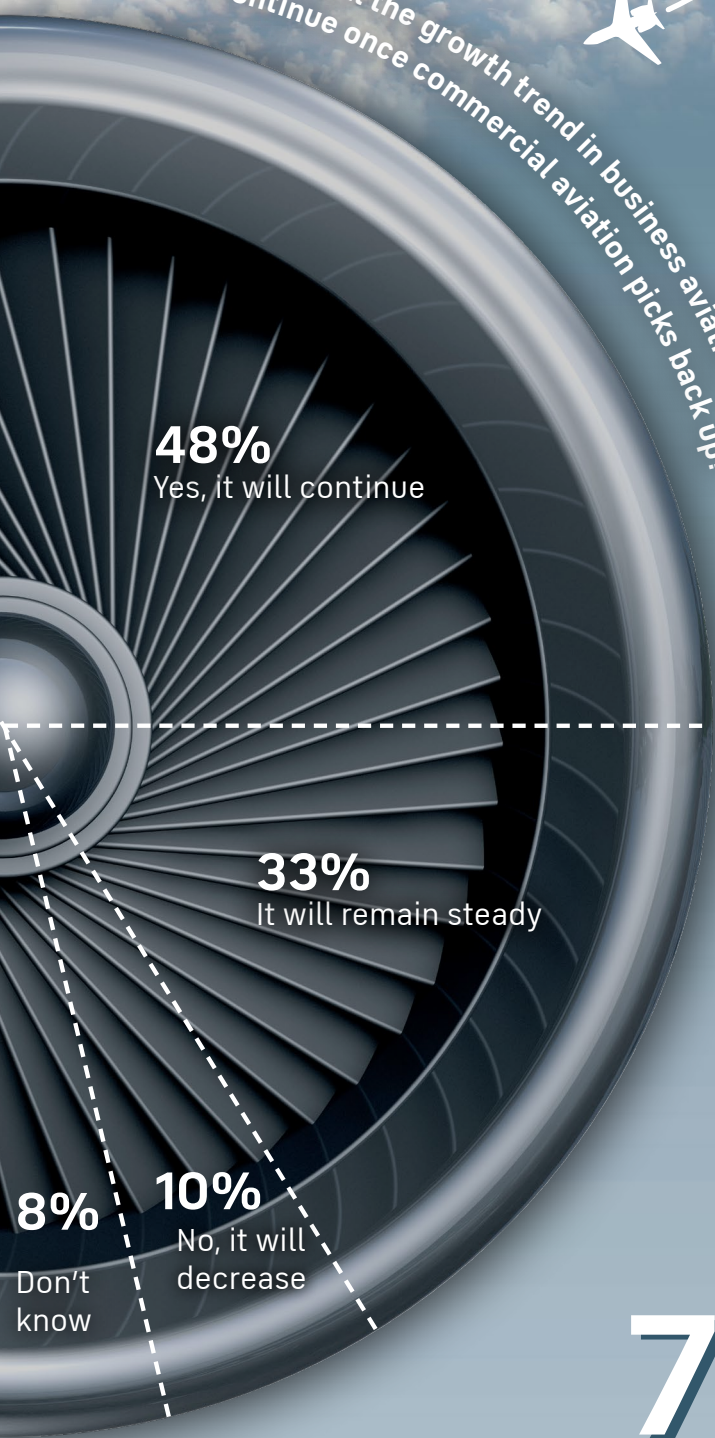
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Will the growth trend in business aviation continue once commercial aviation picks back up?

8 IN 10

BELIEVE BUSINESS AVIATION GROWTH TRENDS WILL CONTINUE, DRIVEN BY CHARTER DEMAND



Where will we see the biggest demand as the industry recovers?

77%

Charter

40%

Fractional

29%

Pre-owned aircraft buyers

10%

New aircraft buyers

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NEW CHARTER COMPANIES ARE EXPECTED, BUT THEY MIGHT NOT CREATE DEMAND FOR NEW AIRCRAFT



Is increased charter demand key to new aircraft deliveries?



44%
Yes, it will increase new aircraft deliveries.

56%
No change.



What type of 'new entrants' are we most likely to see in business aviation?



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