

WINGX

THE BACA REPORT

WINGX
Customized
Market
Research



**The Worldwide Association
of Air Charter Professionals**

Hamburg, February 4th, 2016

WWW.WINGX-ADVANCE.COM

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Key:

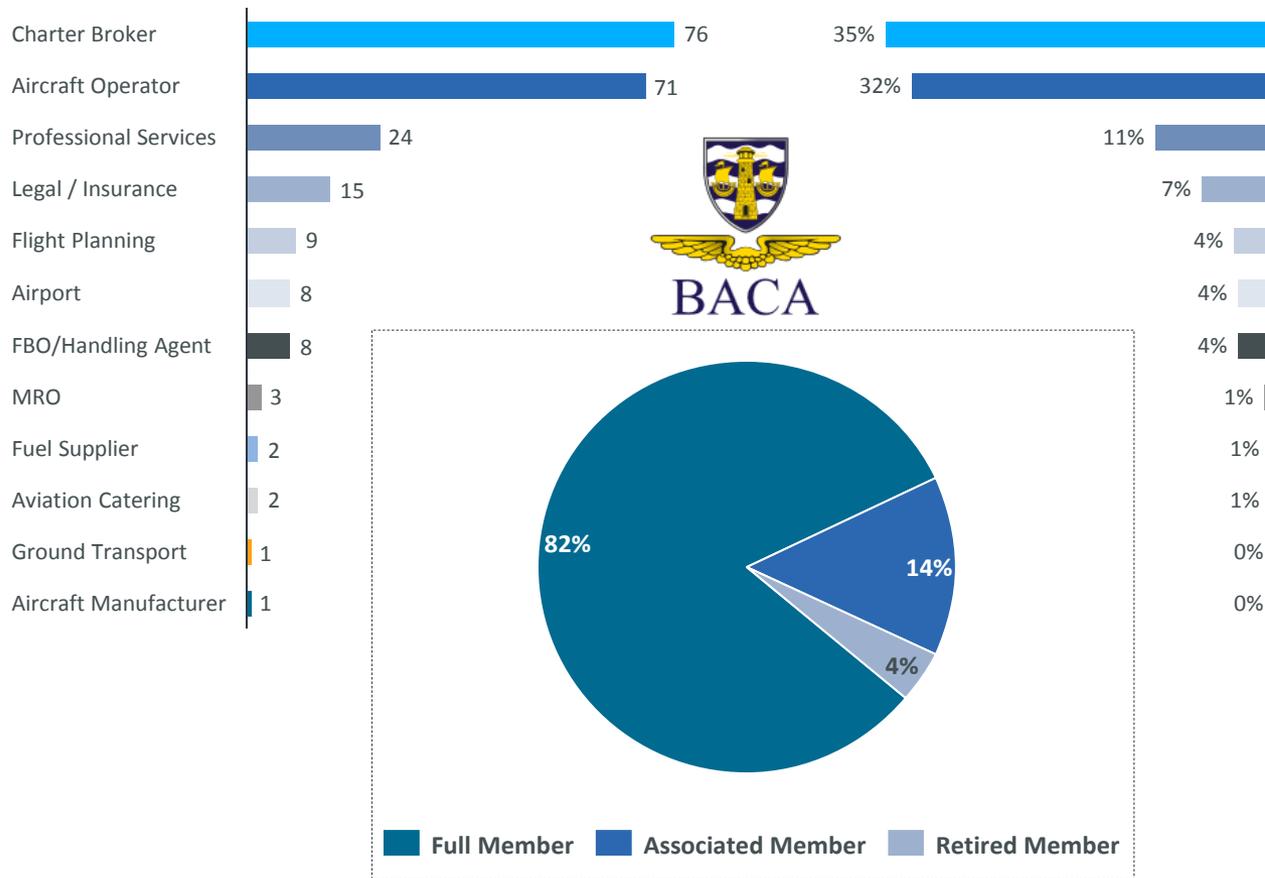
R = WINGX Research, S = WINGX Survey

1. Size and Diversity of BACA Membership

Size and Diversity of BACA Membership [2015]

67% of BACA members are either Charter Brokers or Aircraft Operators. 180 full members.

220 MEMBERS



Professional Services includes: Consulting, Finance, Insurance, Media, Legal

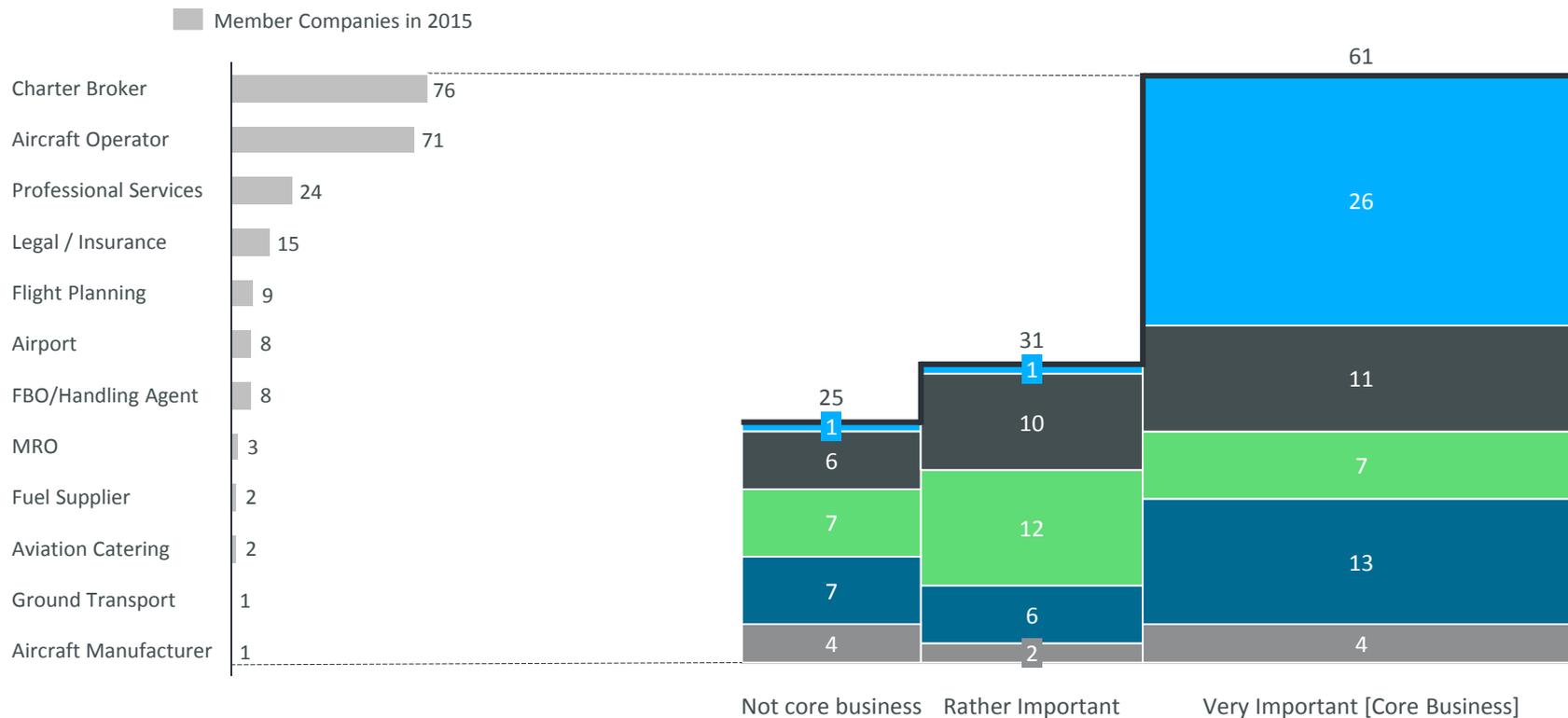
Source: WINGX Research and WINGX BACA Survey, 2015

Services Offered by BACA members*

The Survey indicates that Ad Hoc VIP Charter services are considered the most importance business line. Air Ambulance is considered 'important' as well.

SURVEY RESPONSES

IMPORTANCE OF BUSINESS LINE



*Research based on responses to Survey
 ■ 30 answers received
 ■ Other include "Airline ACMI", "Aircraft Remarketing / Sales"

Source: WINGX Research and WINGX BACA Survey, 2015

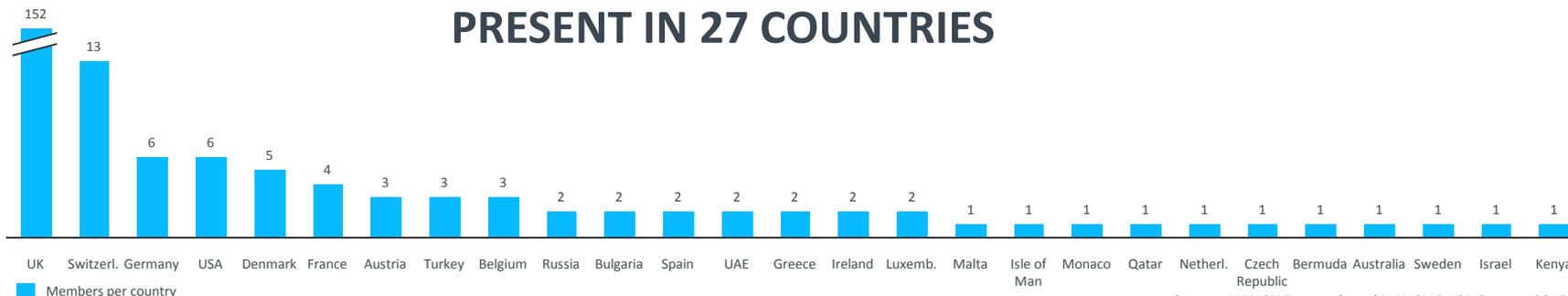
BACA`s global footprint - membership by Geography

BACA membership is mainly European (and mostly UK and Western Europe), also includes members from North America, Russia, Australia, Turkey, Africa.



BACA MEMBERS

PRESENT IN 27 COUNTRIES



Source: WINGX Research and WINGX BACA Survey, 2015

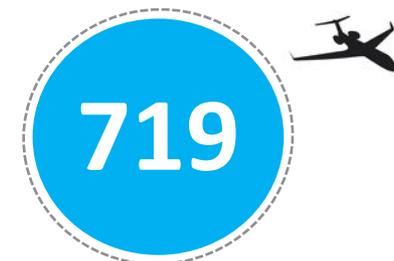
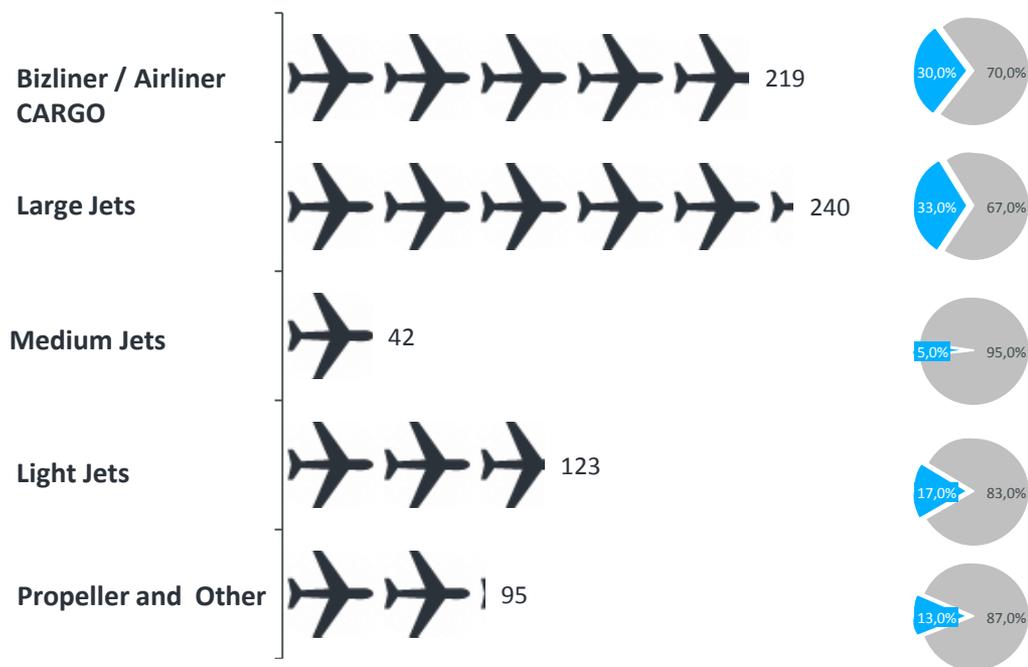
Active Fleet (as of October 2015)

BACA members operate a total of 719 aircraft. 34% of these are used for Passenger and Cargo services. The biggest BACA fleet segment is Large Jets, 240 aircraft.

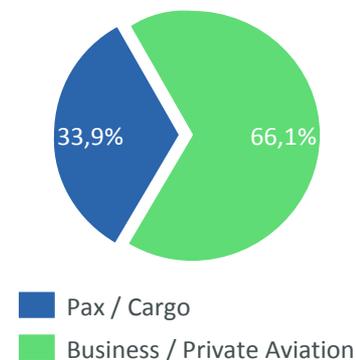
ACTIVE FLEET BY CATEGORY

% OF TOTAL BACA

ACTIVE AIRCRAFT



MISSION FOCUS



*Mission Focus is based on operated activity in Oct YTD 2015. WINGX research on fleet data is as of 2015.

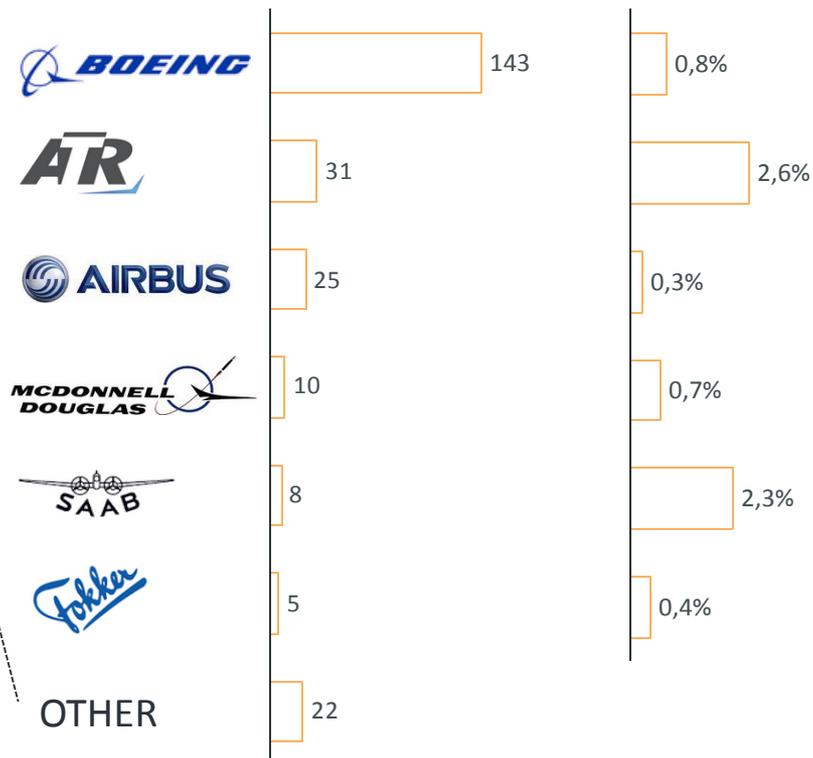
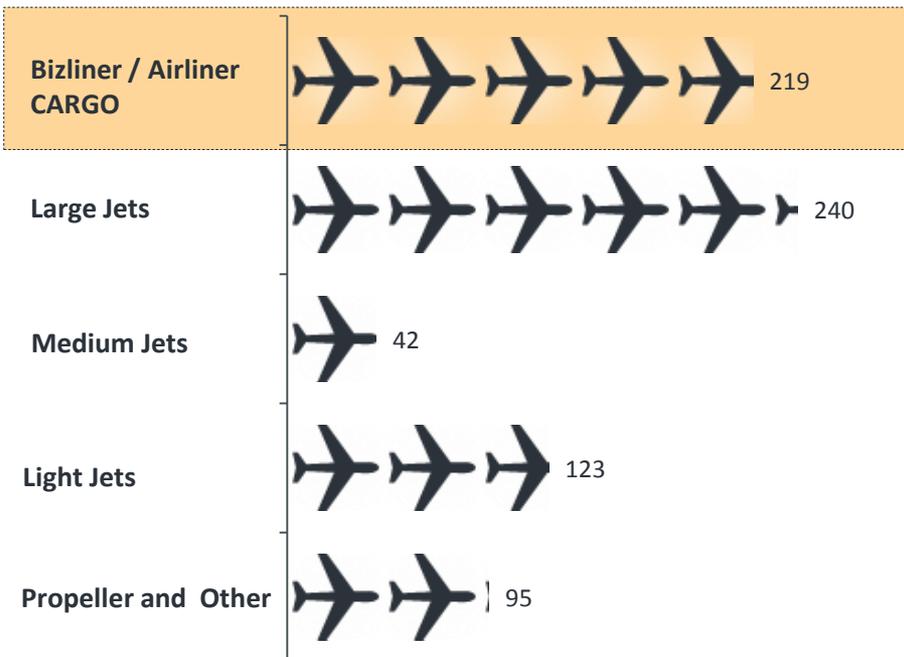
Source: WINGX Research and WINGX BACA Survey, 2015

Active Fleet, Focus on CARGO / Passenger Aircraft

Of the 219 aircraft CARGO / Passenger fleet, most are Boeing. There are also 31 ATR and 25 Airbus aircraft. The BACA fleet represents 2.3% of the global SAAB fleet, for example.

ACTIVE FLEET BY CATEGORY

BACA FLEET BY OEM AND % OF TOTAL* OEM



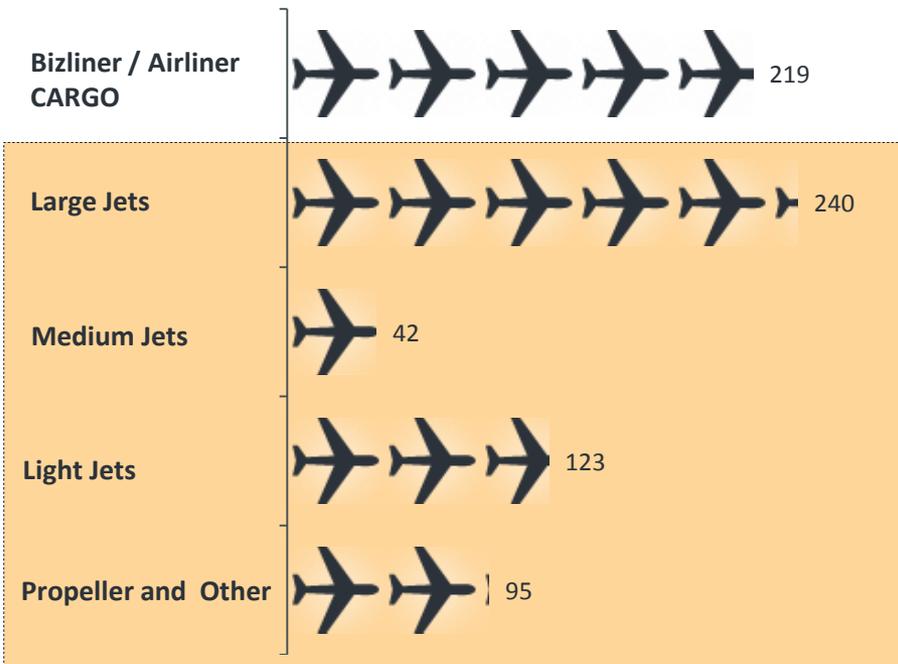
*Global installed fleet of this OEM type of aircraft

Source: WINGX Research and WINGX BACA Survey, 2015

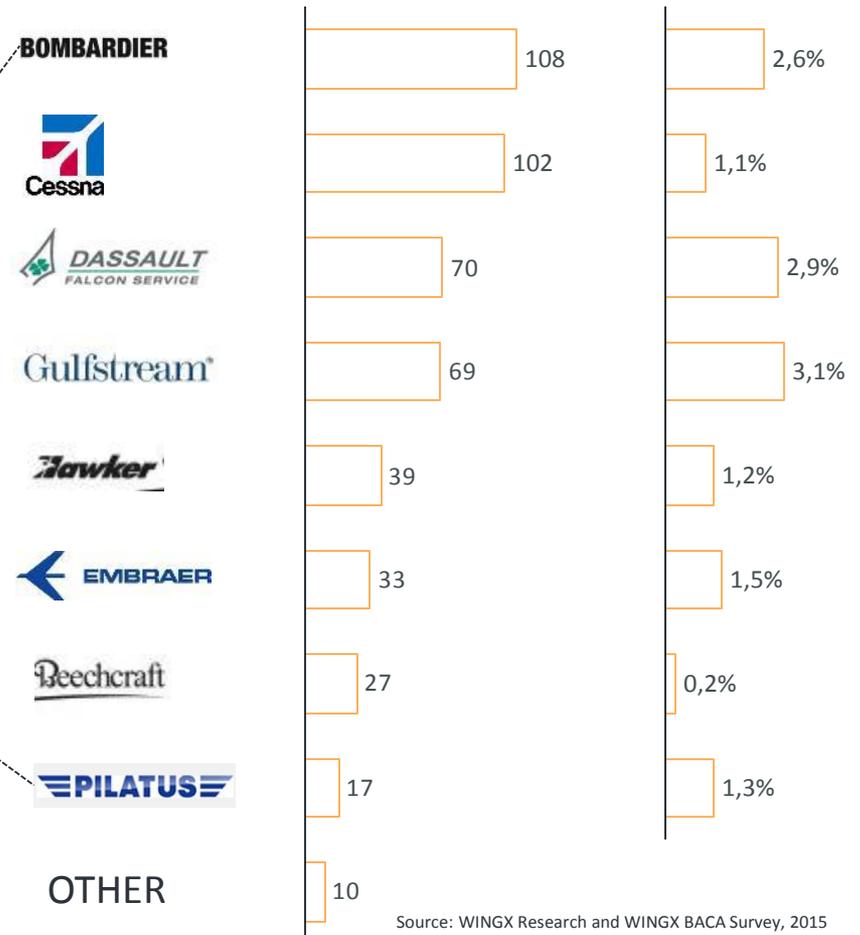
Active Fleet, Focus on Business (incl. Private/General) Aviation

Of the 500 Business Aviation aircraft in the BACA fleet, Bombardier is best represented, numbering 2.6% of the global Bombardier business jet fleet.

ACTIVE FLEET BY CATEGORY



BACA FLEET BY OEM AND % OF TOTAL OEM

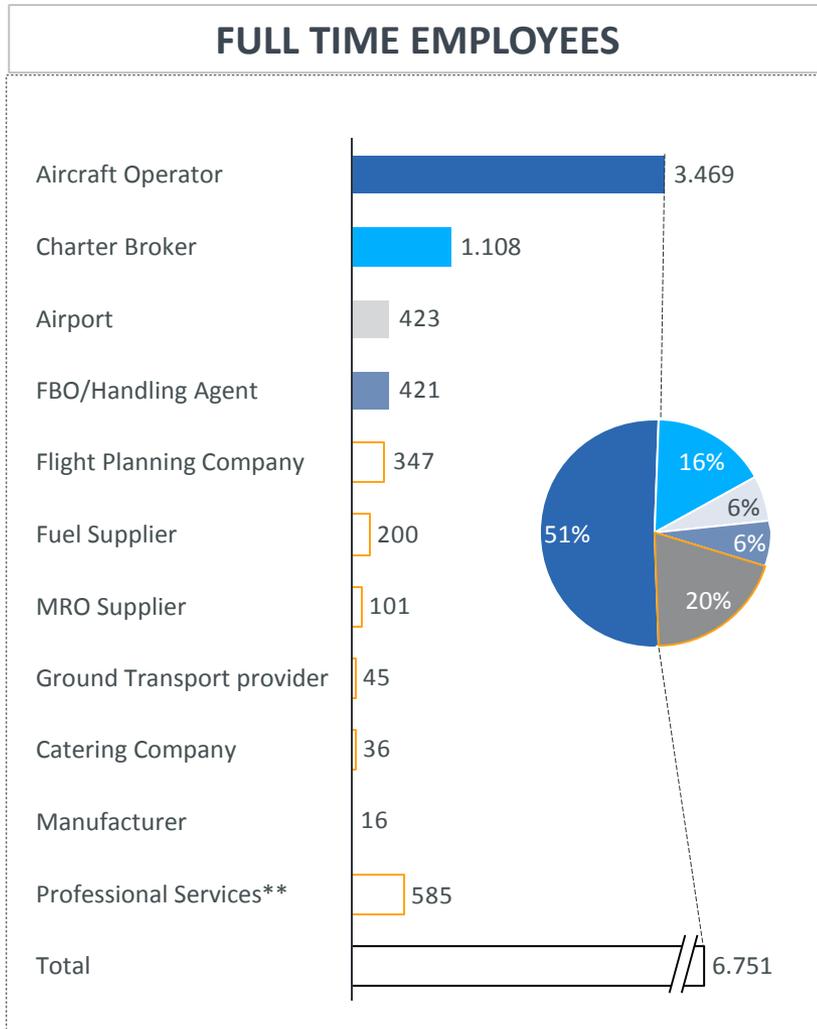


Note: Bombardier includes Learjet

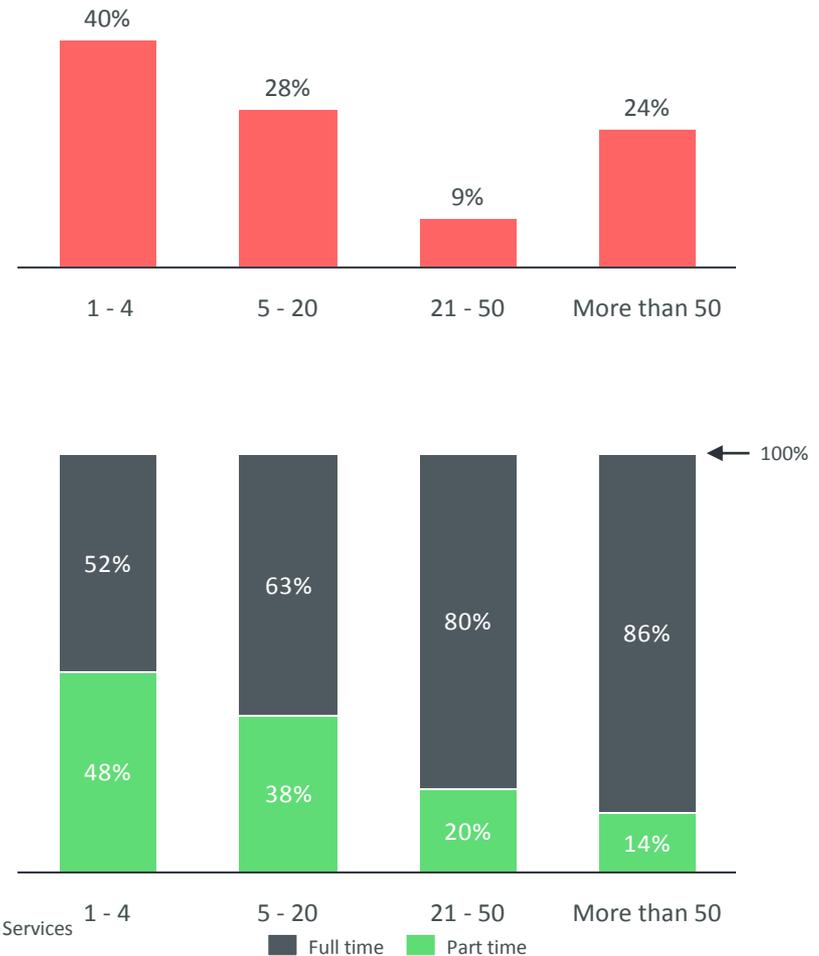
Source: WINGX Research and WINGX BACA Survey, 2015

BACA membership by # Employees*

There are 6751 employees in the BACA membership companies, mainly from Operators. The largest proportion of member companies are small; these have relatively more part-time employees.



HEADCOUNT AND EMPLOYMENT TYPE



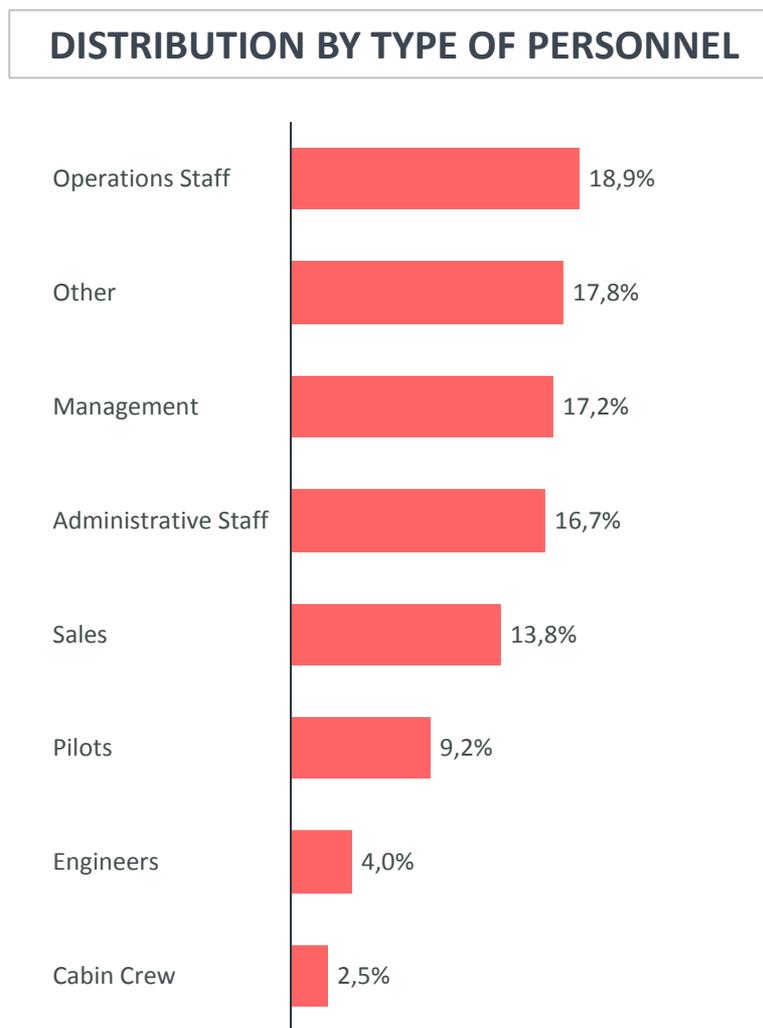
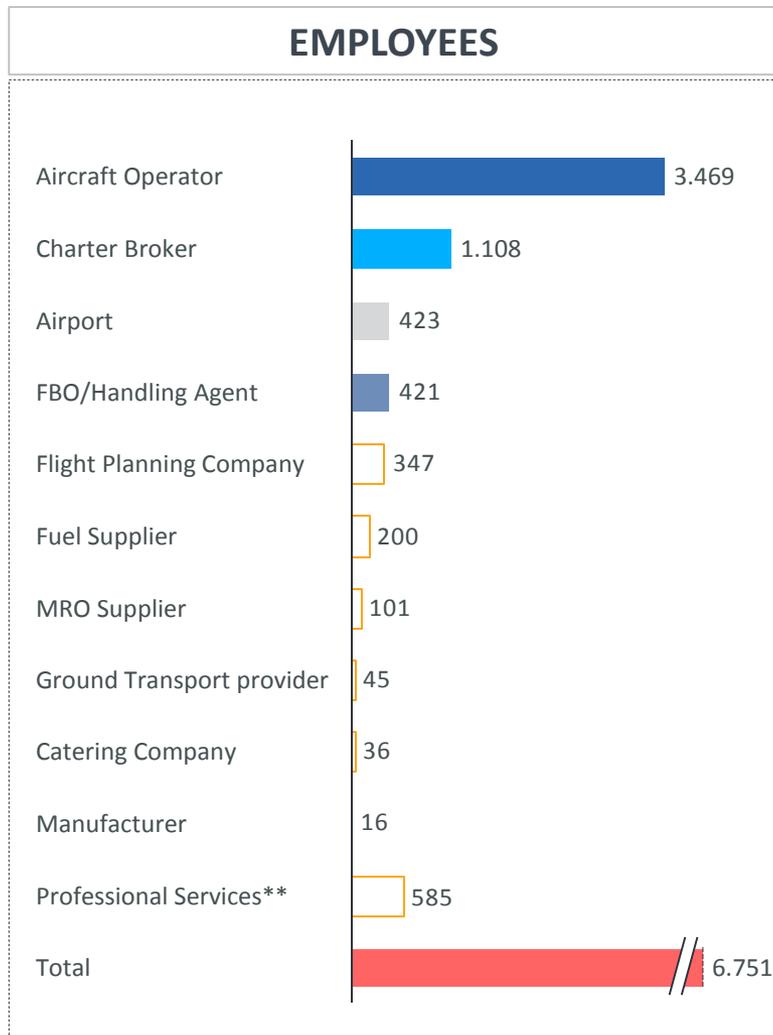
*Research based on full year 2014 records as well as responses to Survey

For largest companies (ARINC, Kennedys, Willis) WINGX researched/estimated size of aviation division

Source: WINGX Research and WINGX BACA Survey, 2015

BACA membership by employee type*

The largest proportion of employees are Operations Staff. Administration comprises about 20%, Pilots and Crew** about 12%.



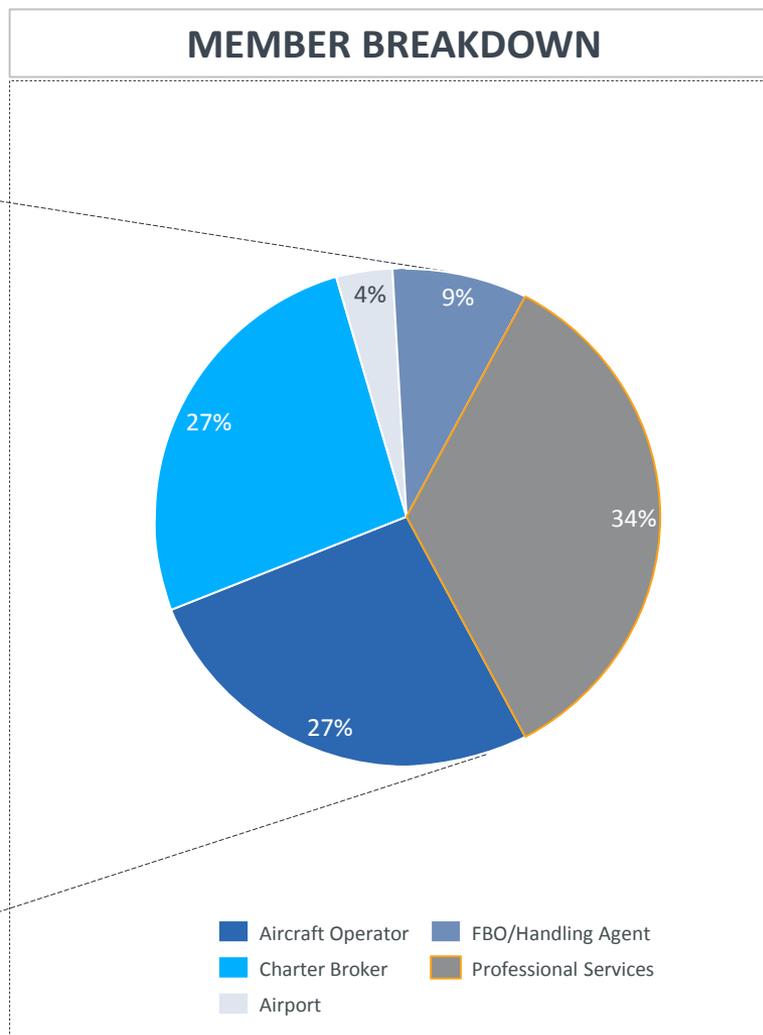
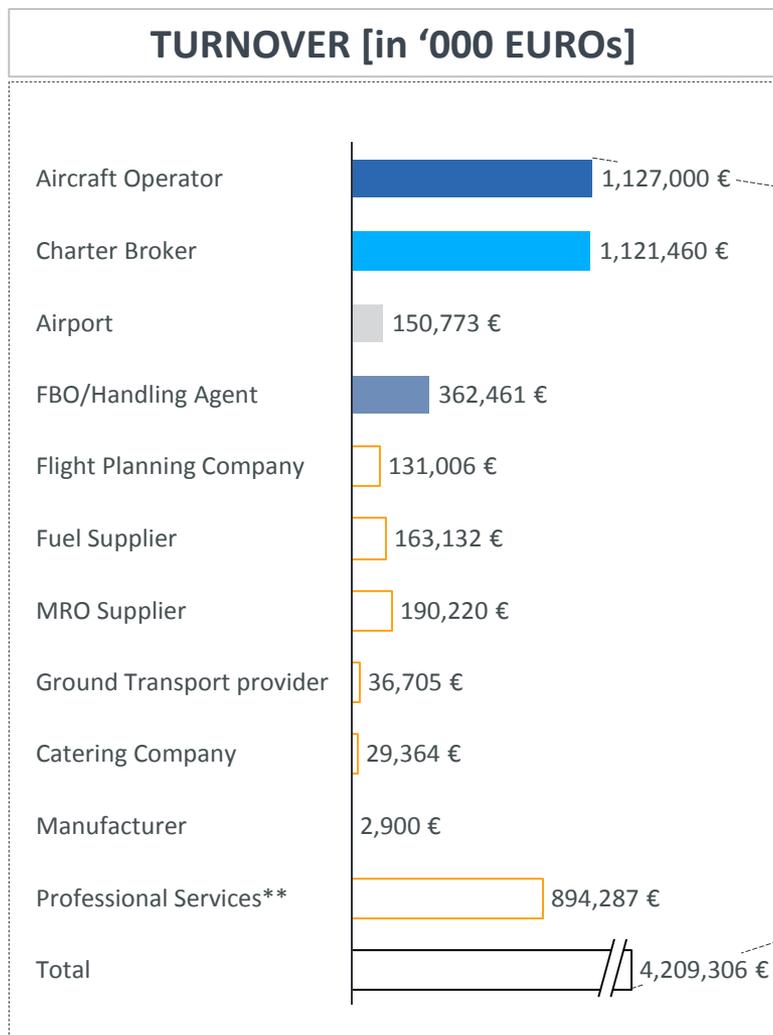
*Research based on full year 2014 records as well as responses to Survey

**Cabin crew appears to be underestimated, but may also have been included by respondents under 'Other'

Source: WINGX Research and WINGX BACA Survey, 2015

Estimated Financial Performance: BACA membership by Turnover*

BACA member companies generated* €4.2BN in 2014. The largest share is from Aircraft Operators, Charter Brokers, and then Professional Services.



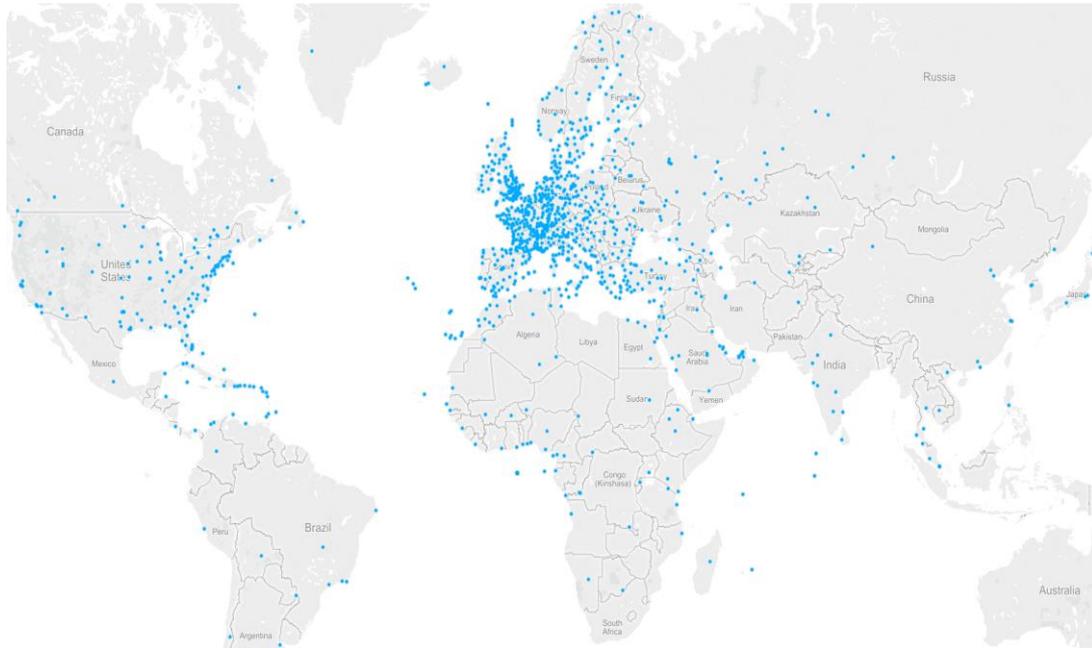
*Research based on full year 2014 records (mainly 'duedil') as well as responses to Survey

**Professional Services includes: Finance, Legal, Insurance, Corporate, Consulting

Source: WINGX Research and WINGX BACA Survey, 2015

3. Flight Activity Footprint: Operator Members: 2015 activity footprint, globally

In 2015, BACA members have operated 147,000 flights, using 1259 airports, connecting 146 countries and over 25,000 city pairs around the world.



FLIGHTS

146.963



FLIGHT HOURS

220.530



AIRPORTS USED

1.259



CITY PAIRS FLOWN

25.859



COUNTRIES SERVED

146



PAX TRANSPORTED

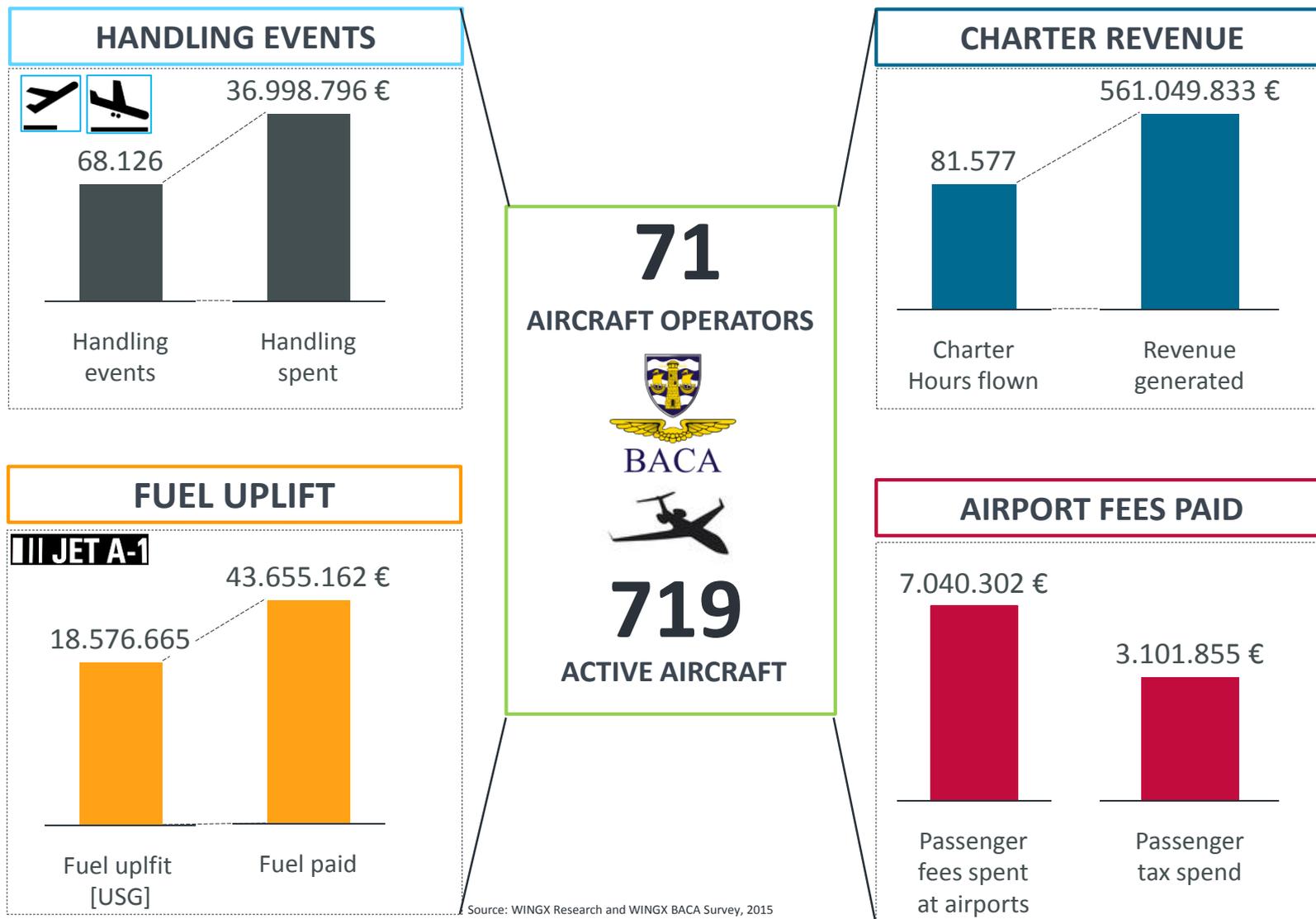
197.053

Note: Shows all aircraft activity of BACA member operators. In all flight activity charts.

Source: WINGX Research and WINGX BACA Survey, 2015

Operator Members: 2015 activity footprint, by activity*

71 Operator Members have conducted 68K handling movements, airport fees of €7M, uplift of 18M USG Jet A1, generating an estimated €561M in Charter revenues.



Source: WINGX Research and WINGX BACA Survey, 2015

Note: Calculations based on WINGX activity tracking and associated market unit pricing, as researched by WINGX. Business Aviation and Pax only (ex Cargo)

BACA Operators, Cargo/Airliner highlights, and Daily Seasonality

BACA member operators have flown 57,282 sectors in Cargo/Airliner aircraft in 2015, 3949 city pairs. The daily seasonality shadows business aviation, more active during the night.

KEY HIGHLIGHTS



FLIGHTS 57.282



FLIGHT HOURS 99.596



AIRPORTS USED 599

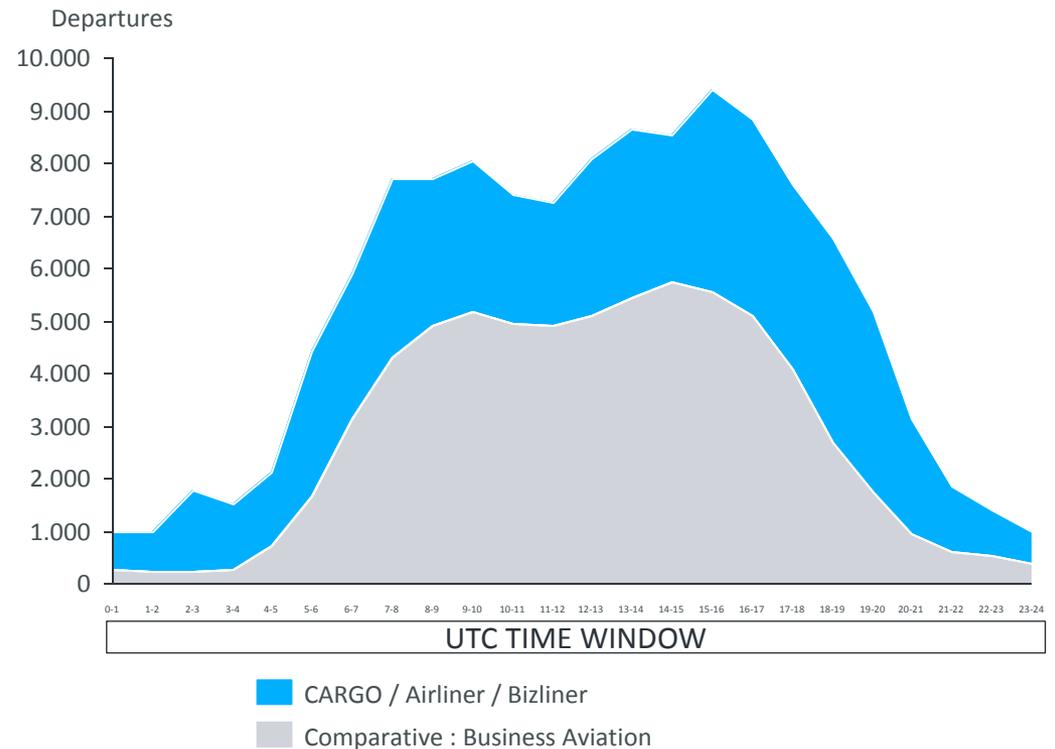


CITY PAIRS FLOWN 3.949



COUNTRIES SERVED 107

24H OPERATION

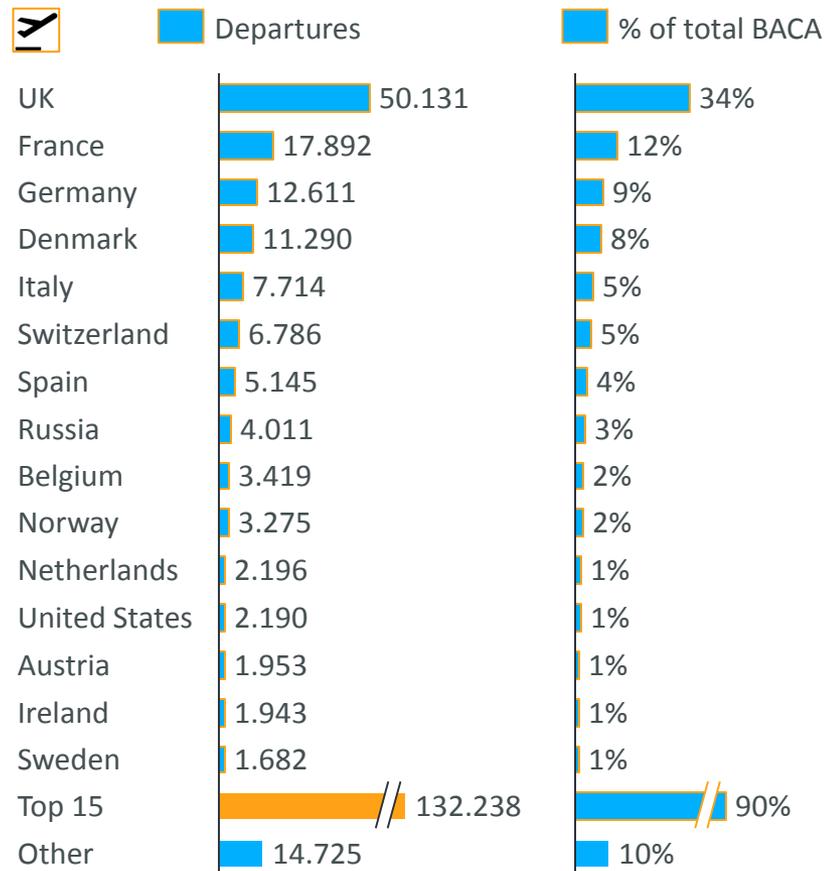
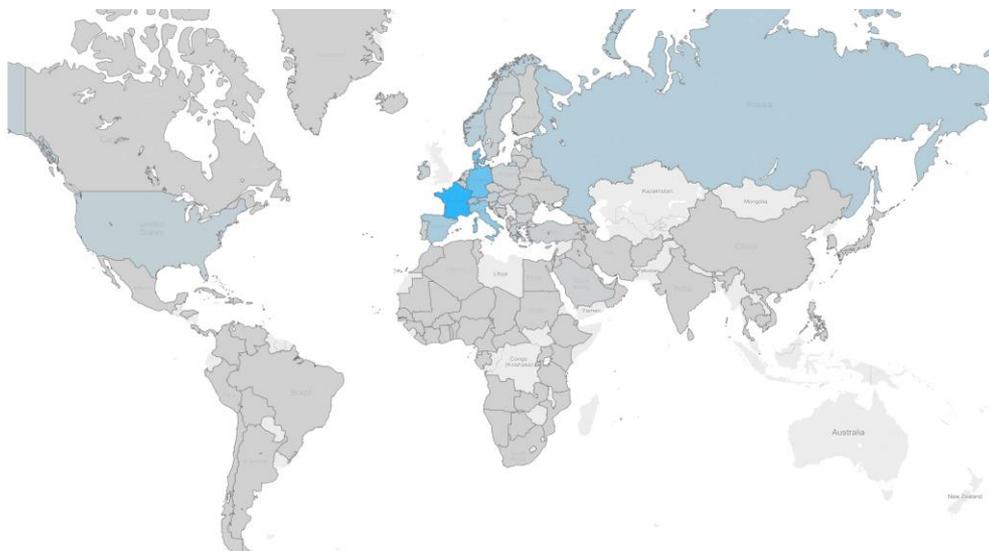


Source: WINGX Research and WINGX BACA Survey, 2015

Note: All flights, all mission types, all aircraft operated by BACA member operators

Flight activity* footprint – Top Origin Countries

The UK is the operational hub for the largest share of BACA member activity, 34% of all BACA flights 2015. Next busiest countries are France and Germany.

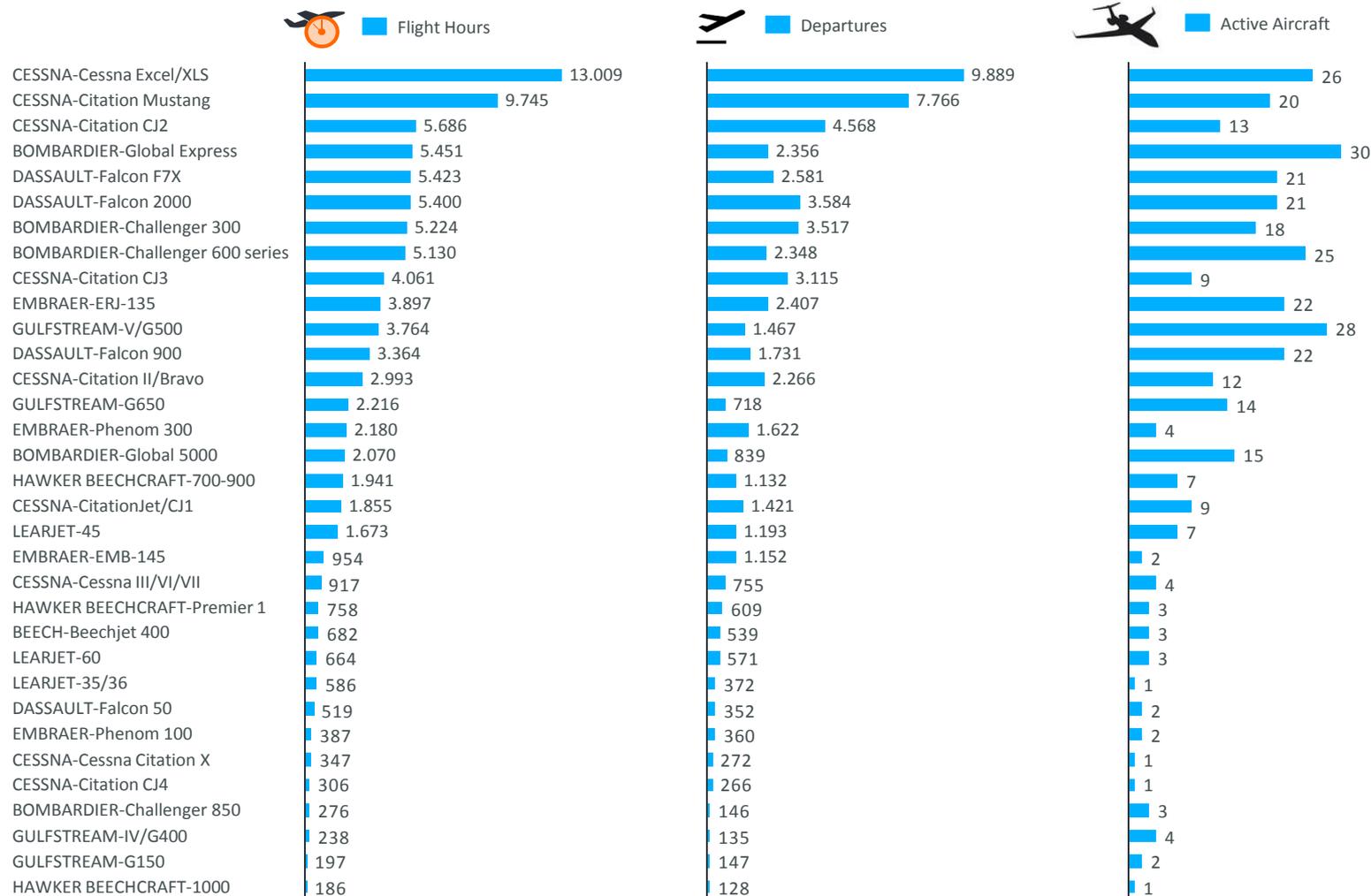


Source: WINGX Research and WINGX BACA Survey, 2015

Note: All flights, all mission types, all aircraft operated by BACA member operators

Top Aircraft, BACA operator, business jets only, from Europe

Busiest BACA member operator business jet is the Excel/XLS; 26 active aircraft in 2015, flying 13K sectors. The busiest large cabin type is the Bombardier Global Express.



Note: Business Jet flights, all mission types, BACA member operators

Source: WINGX Research and WINGX BACA Survey, 2015

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