

EMERGING TRENDS IN BUSINESS AVIATION

Inmarsat Aviation & CJI Survey 2021

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INMARSAT AND CORPORATE JET INVESTOR (CJI) RECENTLY SURVEYED BUSINESS AVIATION PEERS FOR THEIR INDUSTRY OUTLOOKS AHEAD OF 2022. READ ON TO LEARN MORE ABOUT THE SURVEY'S KEY THEMES BELOW.

Principals remain covid-conscious but confident in the future of business aviation, expecting flight frequency to increase, while the importance of online activities in the air is rising.

Like 2020,

CHARTER FLIGHTS

are expected to **DOMINATE** industry demand in the

NEXT 12 MONTHS

with new entrants expected to be first timers:

CORPORATES
and **HNWIs**

The **RECOVERY** in Business Aviation is expected to result in

MORE FREQUENT FLIGHTS

with most feeling these will be over



DECREASING RANGES

in the next year

ONLINE ACTIVITIES

will massively **DOMINATE** principals' time in the air,

almost evenly split between

BUSINESS & LEISURE

while **HEALTH & SAFETY** will remain a key priority in the future

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8 IN 10

BELIEVE MORE FREQUENT FLIGHTS WILL BE TAKEN IN THE NEXT YEAR, WITH MOST FEELING THESE WILL BE OVER DECREASED RANGES



With regards to business aviation flight paths, which of the following do you think will be most accurate over the next 12 months?

LESS FREQUENT FLIGHTS



MORE FREQUENT FLIGHTS

6%

Over decreased ranges

7%

Over increased ranges

8%

No noticeable change to frequency or range

51%

Over decreased ranges

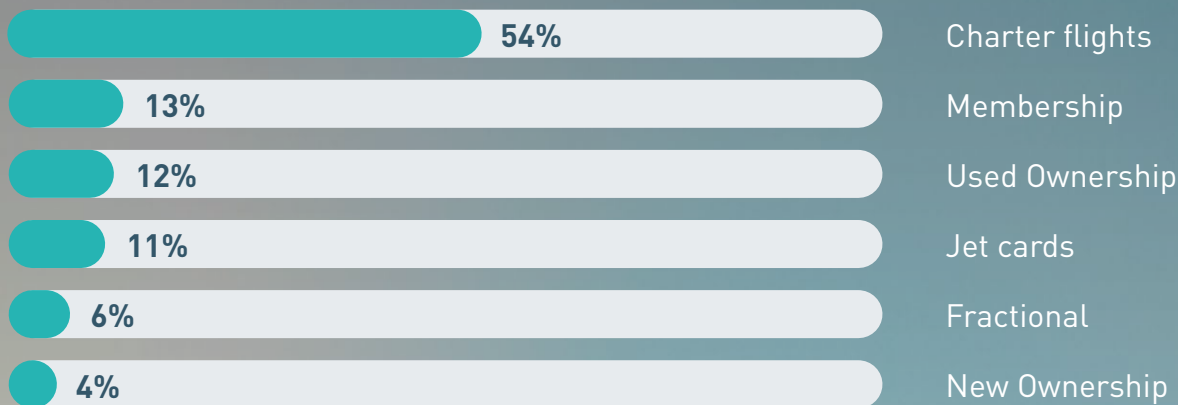
28%

Over increased ranges

OVER 50% OF INDUSTRY PLAYERS THINK CHARTER FLIGHTS WILL LEAD DEMAND IN NEXT 12 MONTHS

FIRST-TIME CORPORATES AND HNWIs WILL CONTRIBUTE MOST TO 'NEW ENTRANTS' FIGURES

Where will we see the biggest demand in the industry over the next 12 months?



Where will we most likely see 'new entrants' in business aviation?



16%

Corporates up-trading to ownership

37%

First-time corporates

17%

UHNWIs up-trading to ownership

30%

First-time UHNWI

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90% BELIEVE ONLINE ACTIVITIES WILL DOMINATE PRINCIPALS' TIME IN THE AIR, ALMOST EVENLY SPLIT BETWEEN BUSINESS & LEISURE

HEALTH & SAFETY, AND THEN SCHEDULE RELIABILITY, WILL BECOME MORE IMPORTANT

What inflight principal behaviours do you believe will increase over the next 12 months?

4%

Offline leisure activities

4%

Offline business activities

51%

Business related online activities

41%

Leisure activities with connected devices

Range 1%

Speed

8%

Comfort

9%

Cost

13%

Schedule reliability

24%

Health & safety

46%

Which factors will most increase in importance for the principal's journey over the next 12 months?

THANK YOU



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