



EBA

**Are we headed for a triple
dip recession ?**

2016 Press Conference

✈ DEPARTURES

Time

Destination

13:30	OPENING REMARKS
13:35	ECONOMIC IMPACT
13:45	STATE OF INDUSTRY
14:00	WHAT NEXT?
14:10	QUESTIONS AND ANSWERS
14:30	END

Take Off



*The economic impact of
business aviation in Europe*

About the 2016 Economic Study



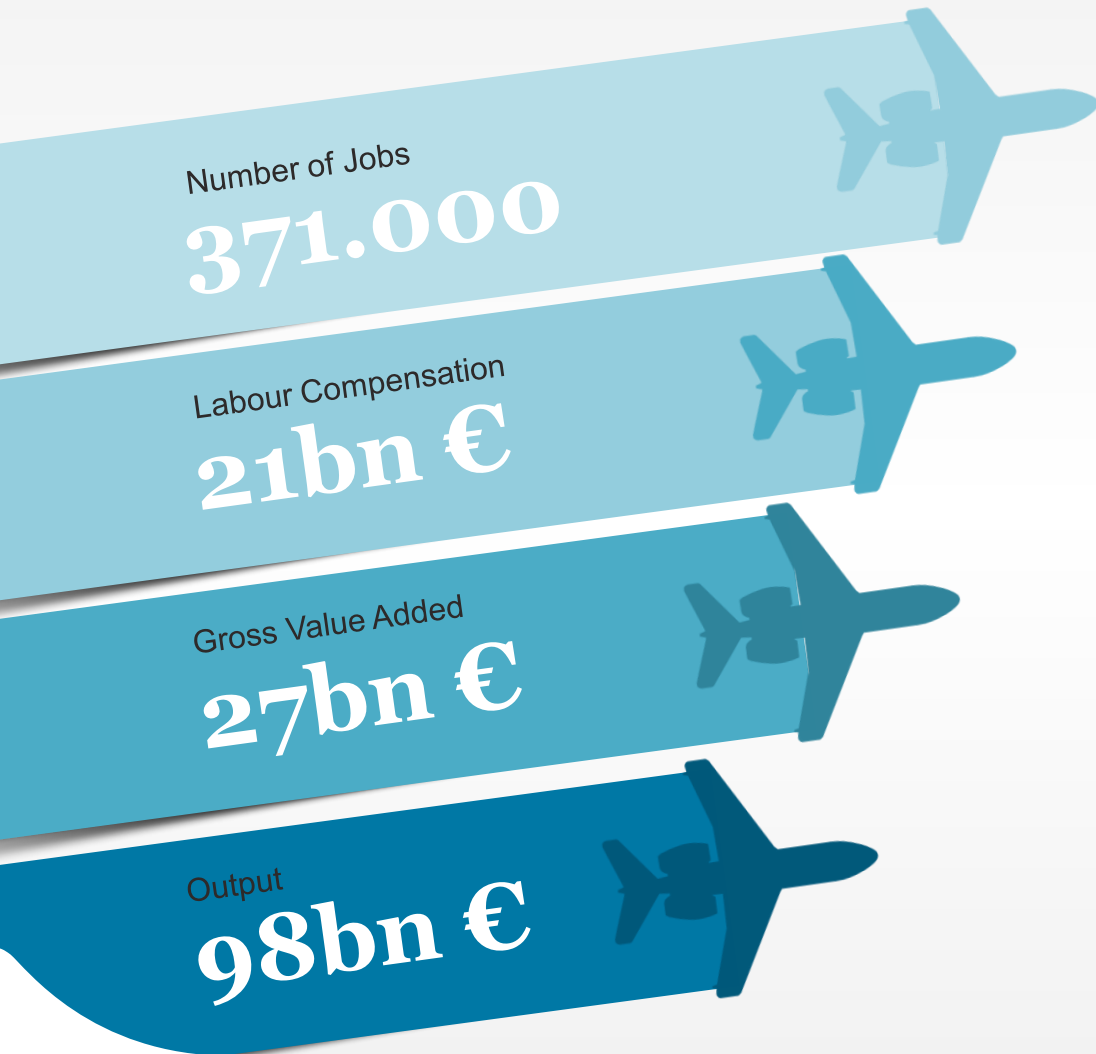
#1 Economic Contribution

#2 Time and Cost Efficiency

#3 Connectivity

#4 Country Case Studies

The sector punches above its weight in many different ways...



■ **Germany, France and UK**
are the main players in the sector
producing 63% of the total GVA of the industry



... It is a time machine that can be quantified...



20%

of Business Aviation flights are more than 5 hours shorter than their best commercial alternatives



127 minutes

The average time saved using a Business Aviation flight rather than the fastest commercial counterpart

... And it boosts the attractiveness of peripheral businesses

+25k

Airport pairs served by Business Aviation not connected by Airlines

200k

Business Aviation flights are not possible via Airlines





En-route



State of the industry

BusAv traffic normally follows GDP – What’s going on?

GDP evolution vs. BusAv departures evolution

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GDP



BusAv Traffic

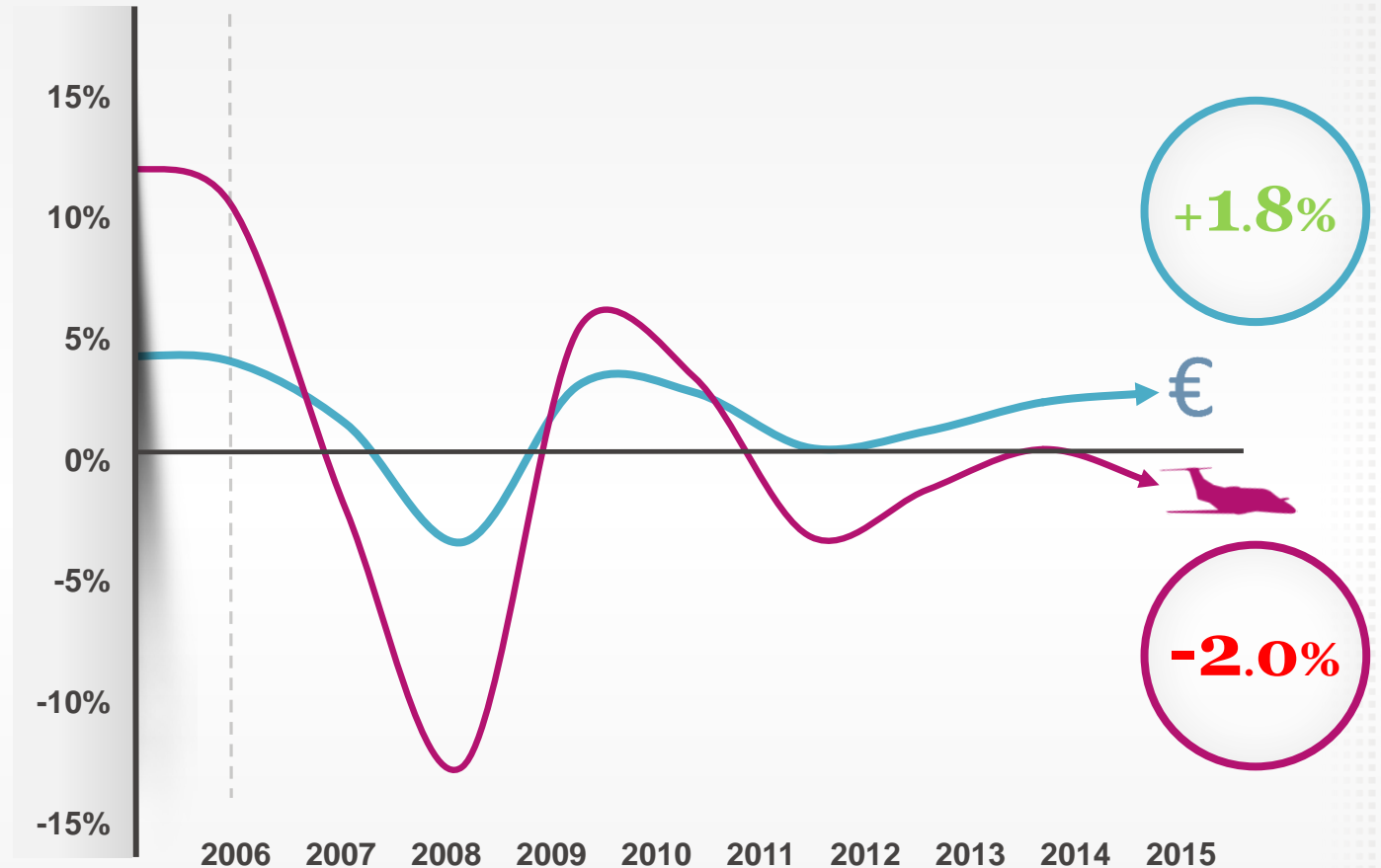


2015



BusAv departures

GDP EU28

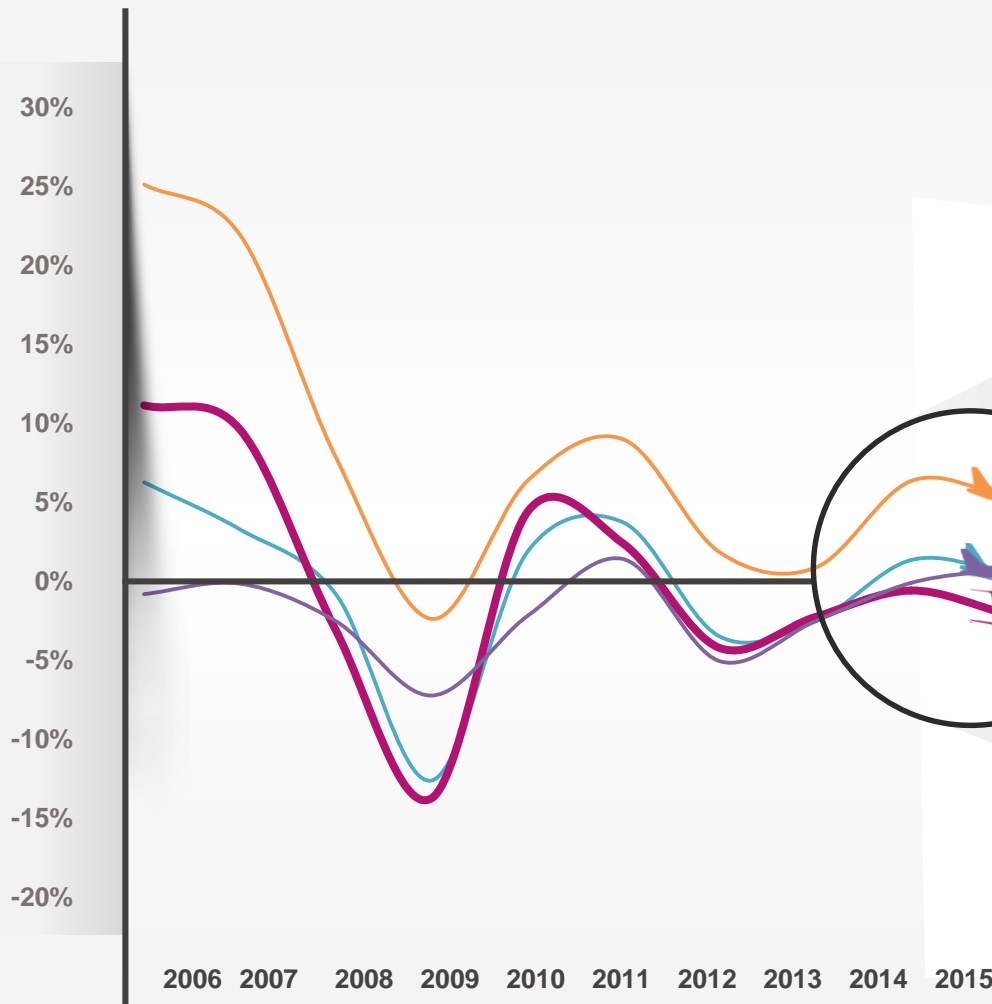


Triple dip recession?

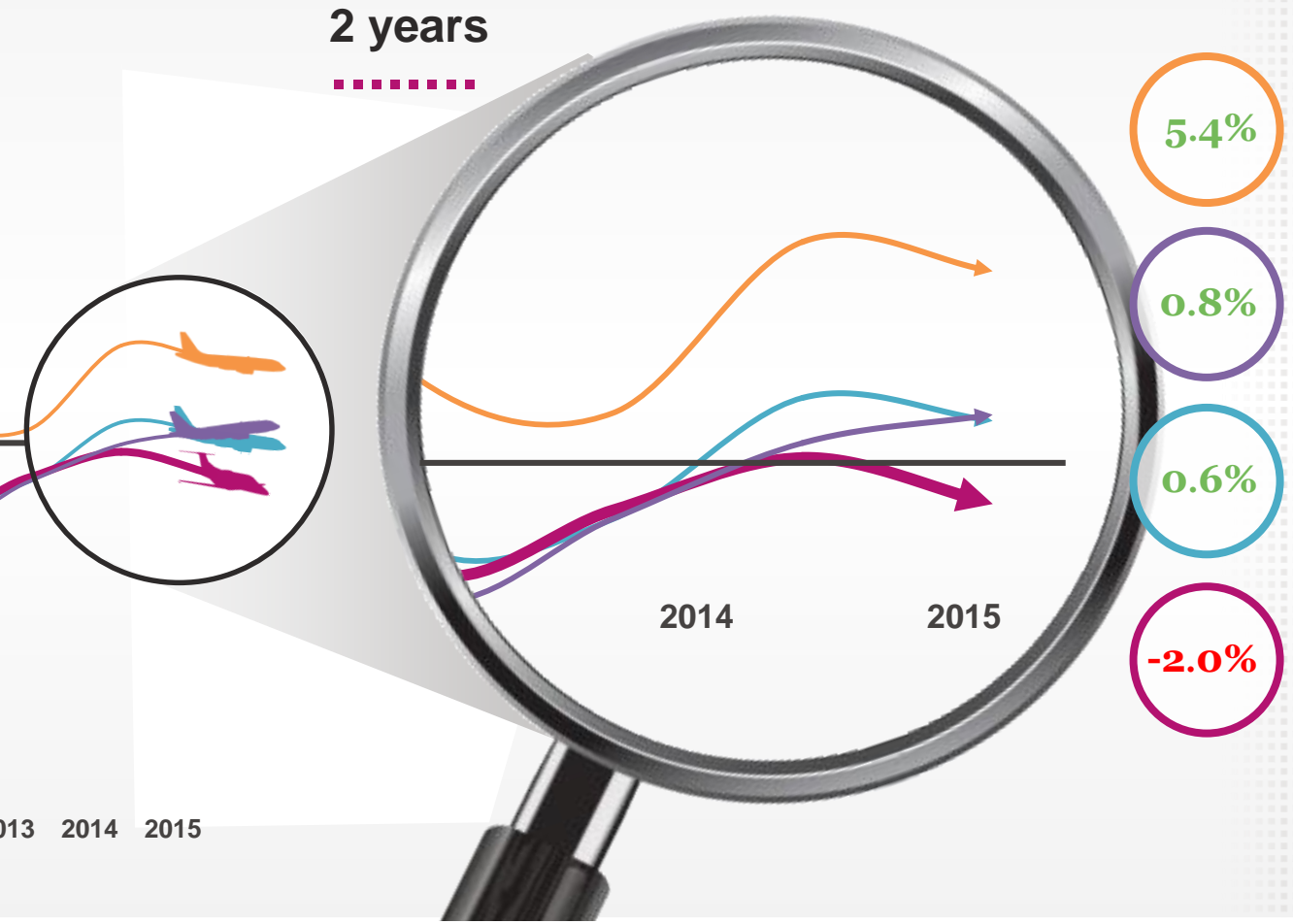
Traffic evolution 10 years



- Low Cost
- Cargo
- Business Aviation
- Legacy Carriers



Traffic evolution 2 years



Decline in activity across most key airports

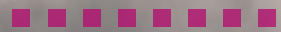
Top 10 BusAv Airport traffic evolution



... as well as across most airport pairs



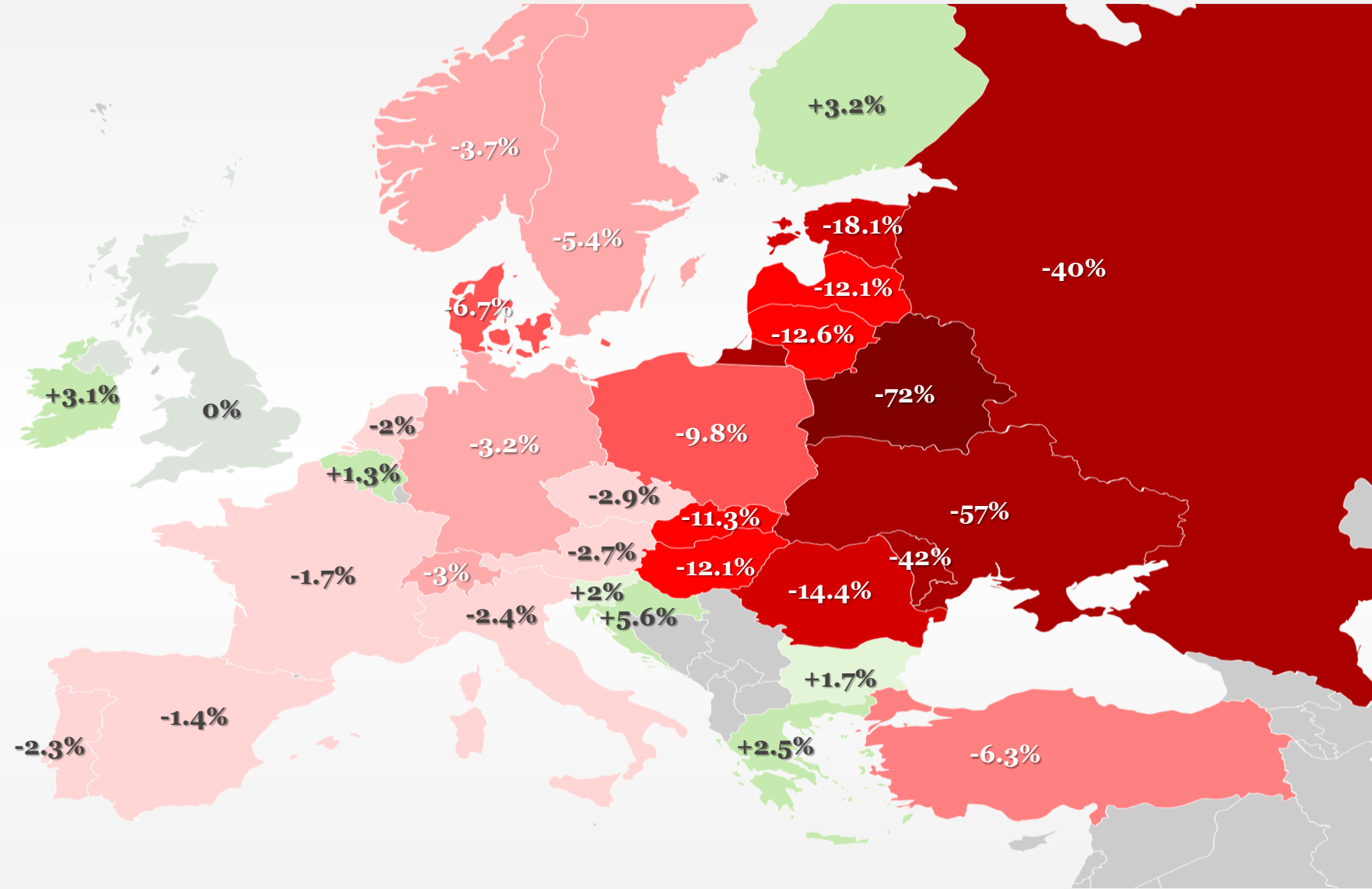
Is this just passing turbulence?



Was the promise of the East only fleeting?



Average yearly
departures
2015 vs. 2014



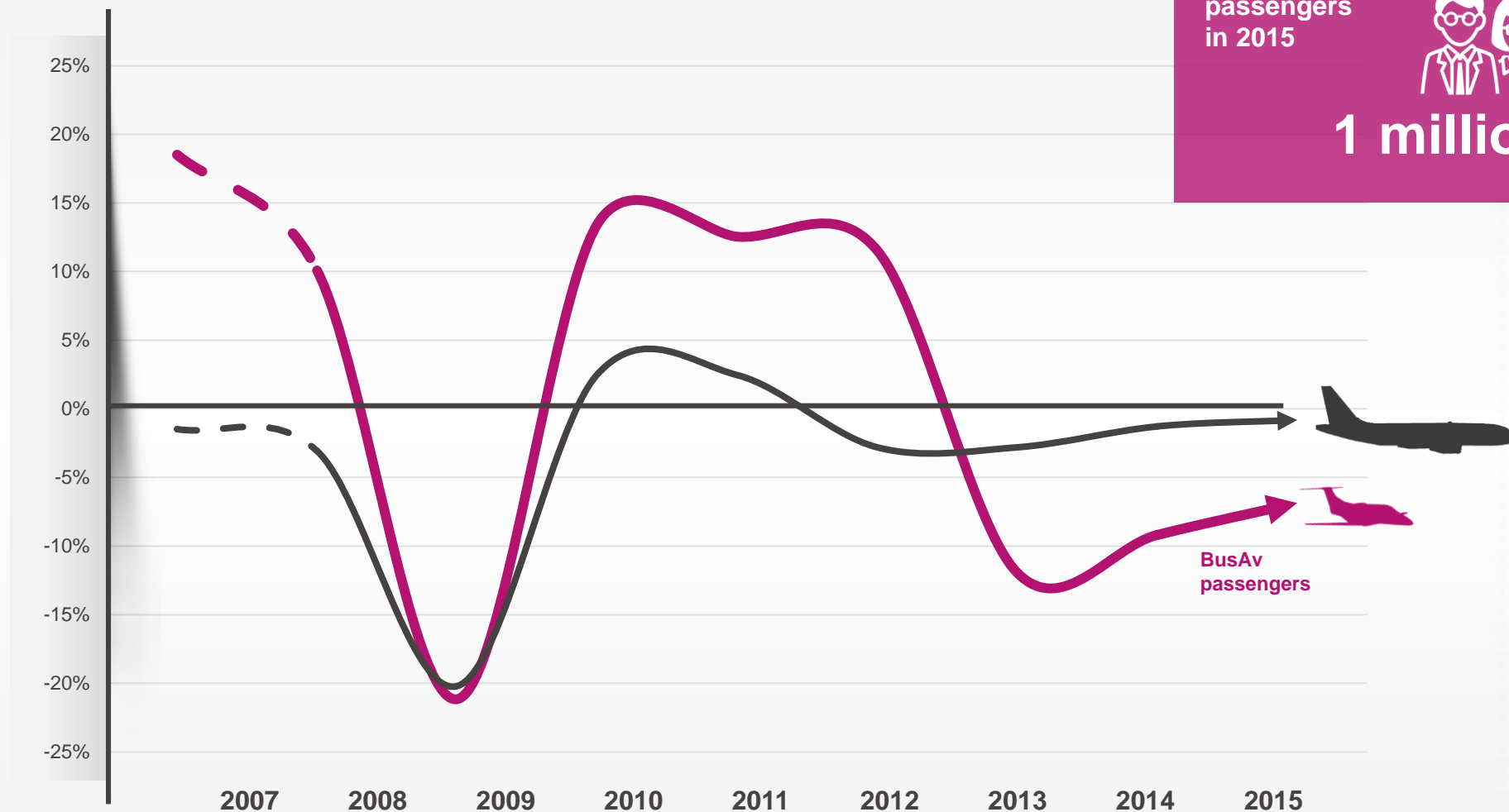
What's happening to the BusAv and premium passengers segment?

BusAv passengers vs. Legacy Carriers premium passengers

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- BusAv passengers
- Legacy Carriers premium passengers



BusAv passengers in 2015



1 million



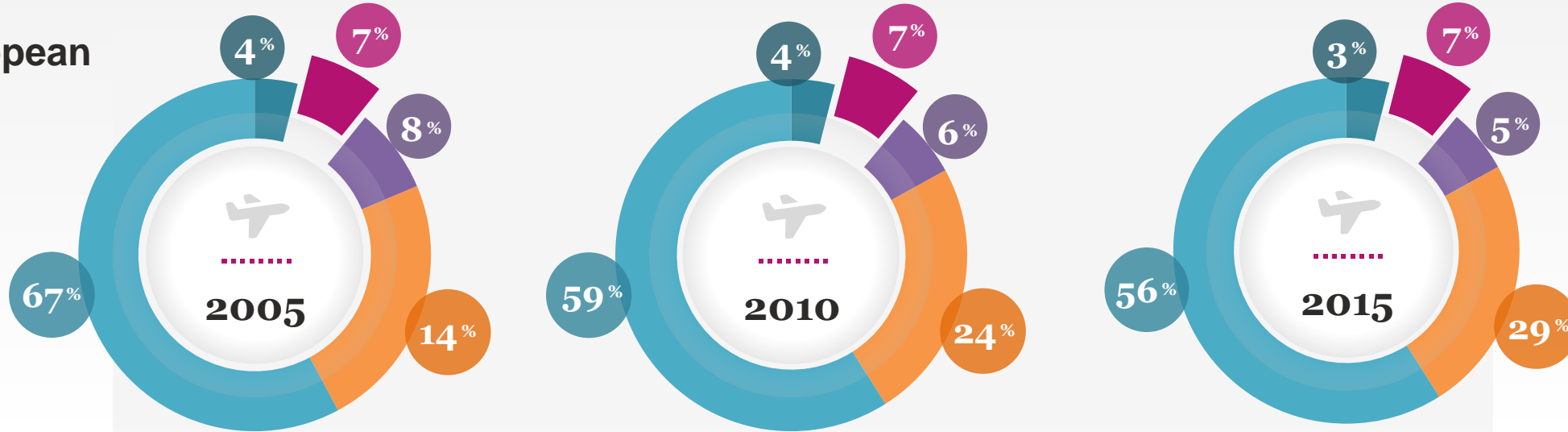
BusAv passengers

On the bright side

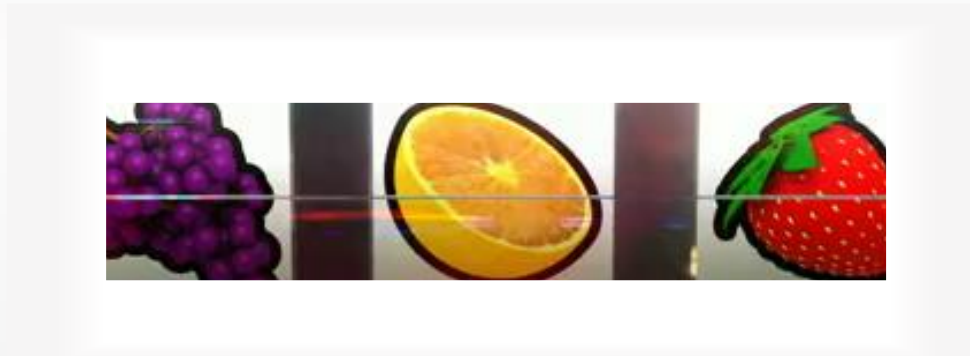


Seven is our lucky number

% of European flights

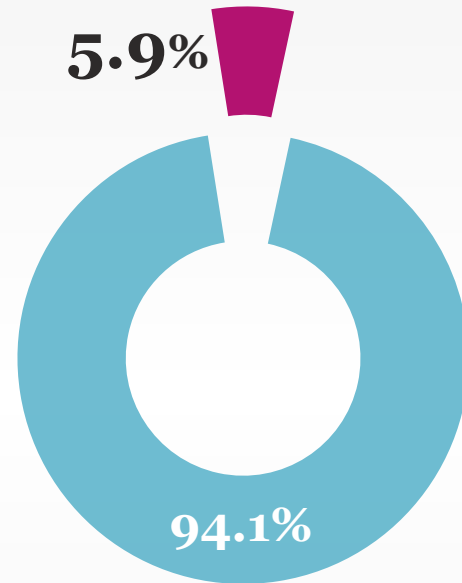


- All Cargo
- Business Aviation
- Charter
- Low Cost
- Legacy Carriers

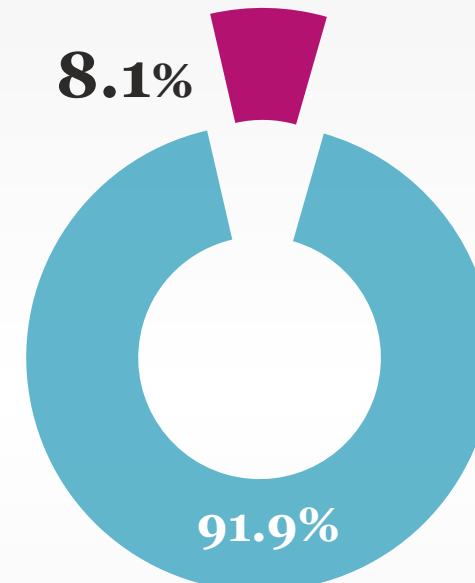


Business Aviation used increasingly for long haul

Extra Europe
BusAv departures
vs. Intra Europe
BusAv departures



2005



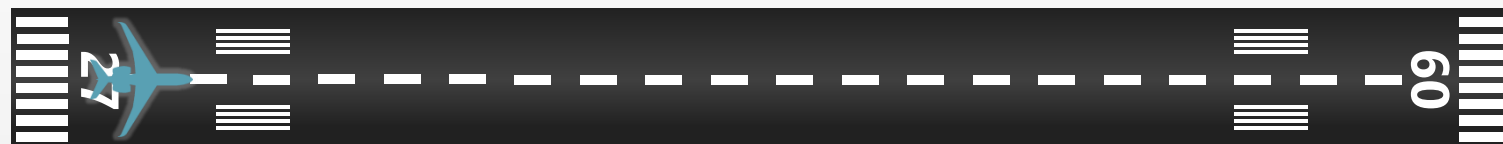
2015

Extra Europe depart 2015:
+40% compared with 2005

Intra Europe depart 2015:
-2.7% compared with 2005



- International departures
- Domestic departures





What next?



EBAA is taking actions

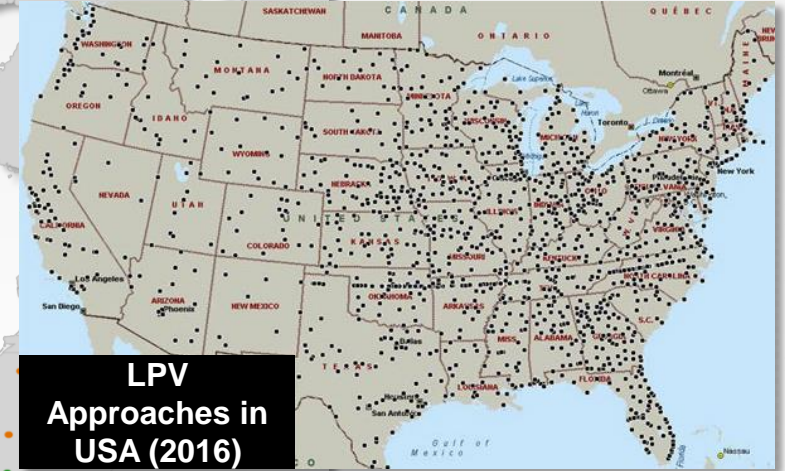
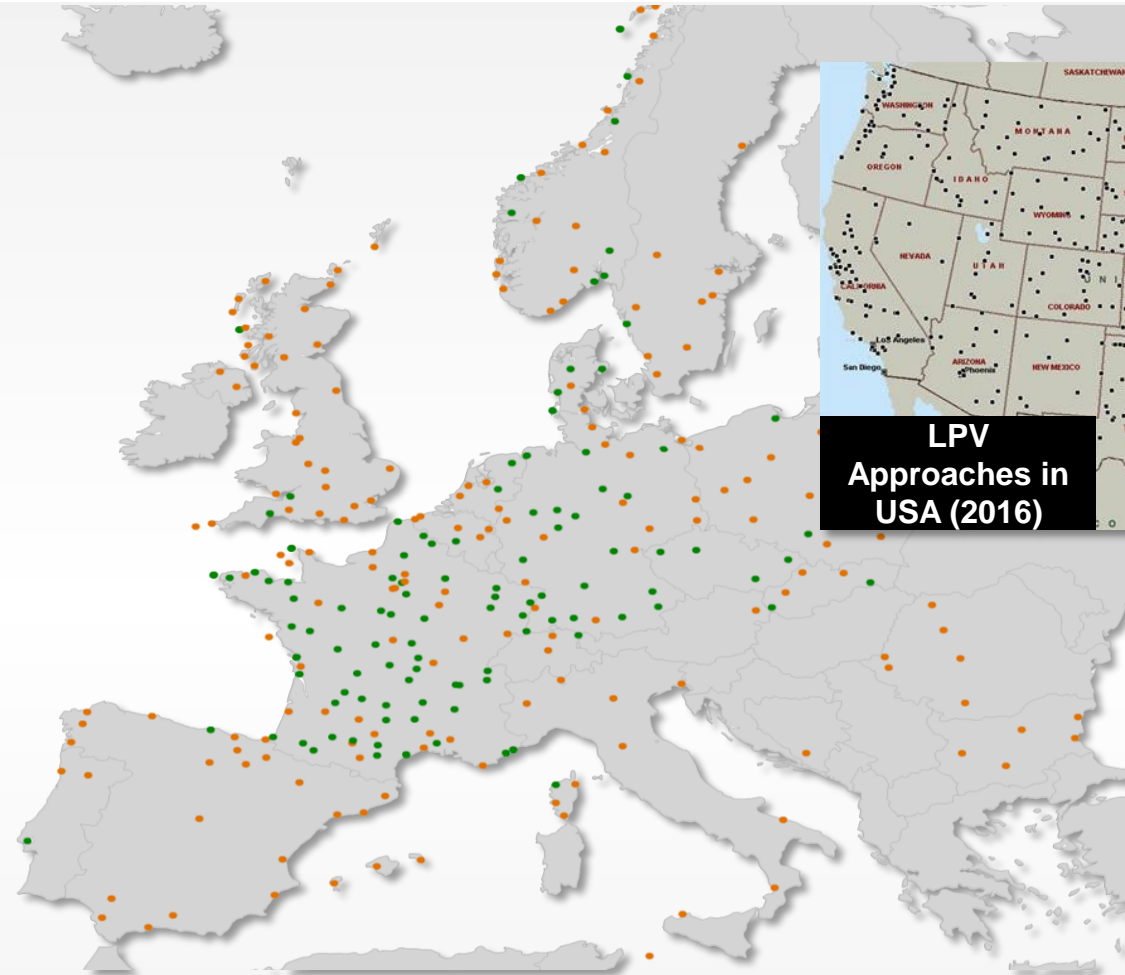
Increasing the number of satellite-based precision approaches



240
runway ends
operational



500
LPV runway ends
planned



More than 3500
LPV approaches



Planned ■

Operational ■

Quantifying the time savings and turning it into \$

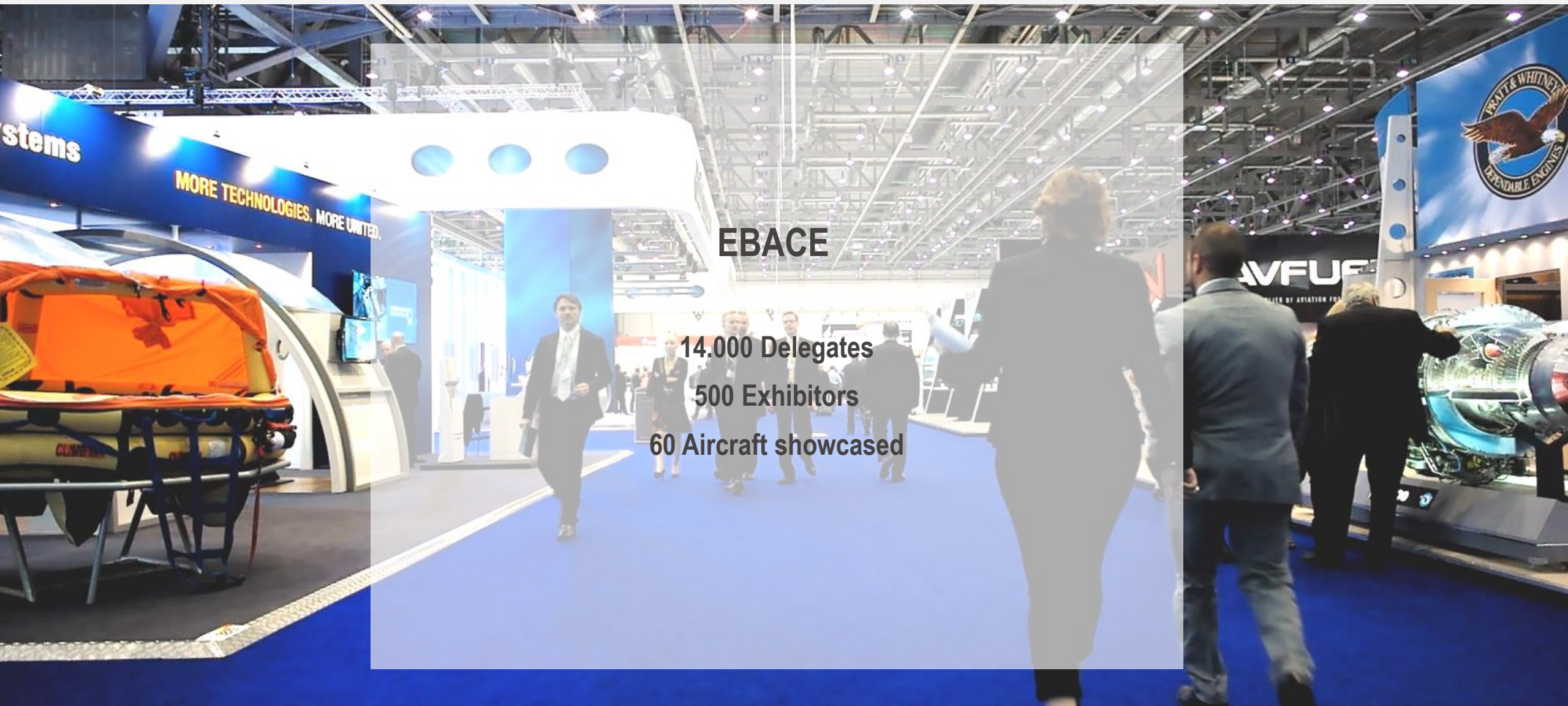


Disseminating Just Culture through sharing of occurrences in a no-blame environment



EBAA Safety Occurrence Reporting System

Offering the right platform for the industry dialogue



EBACE

14.000 Delegates
500 Exhibitors
60 Aircraft showcased



Final Approach



Questions ?

EBAA Full Members

