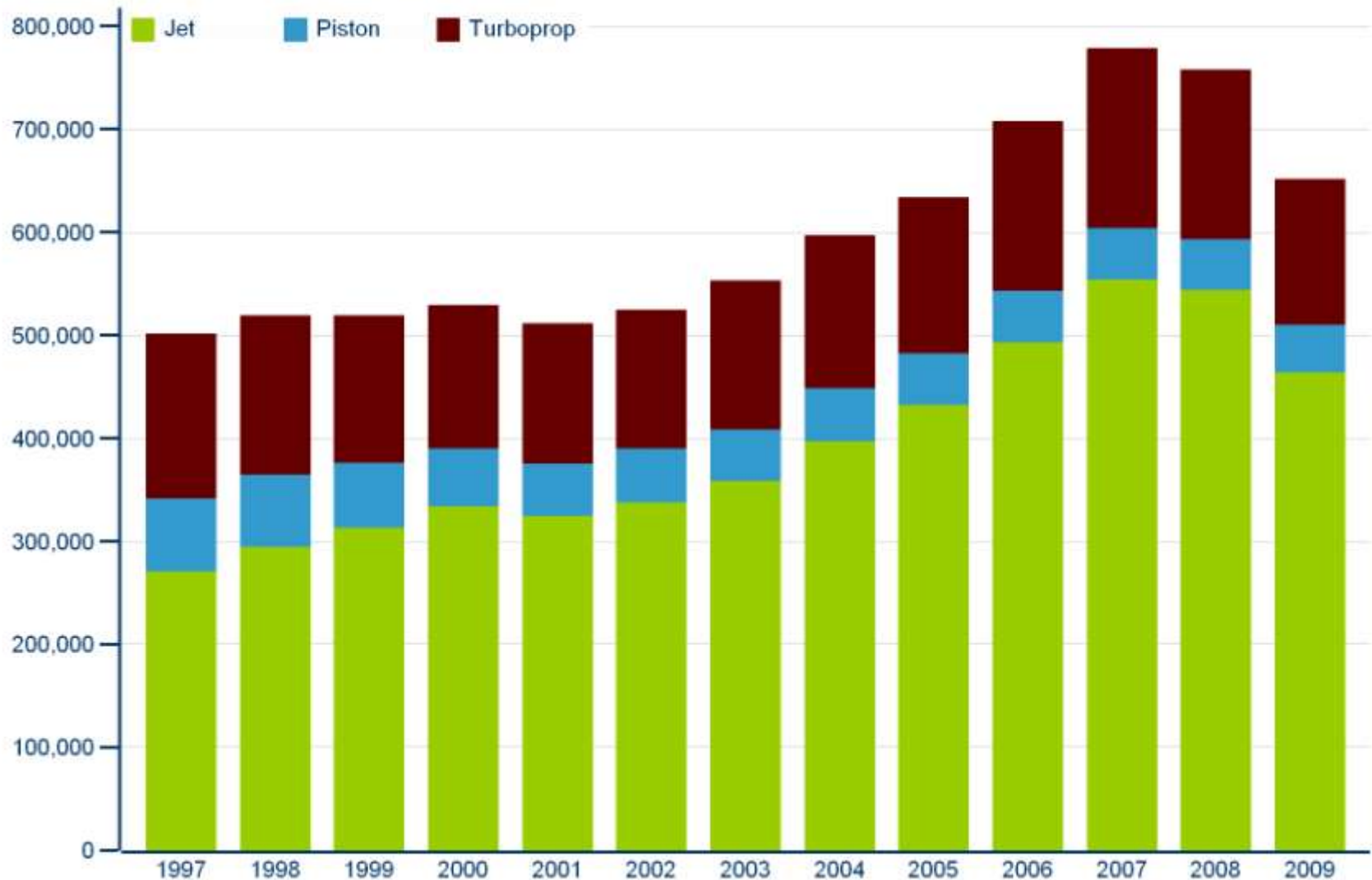


Business Aviation - The Crisis and After

David Marsh

A 14% reduction in flights in 2009

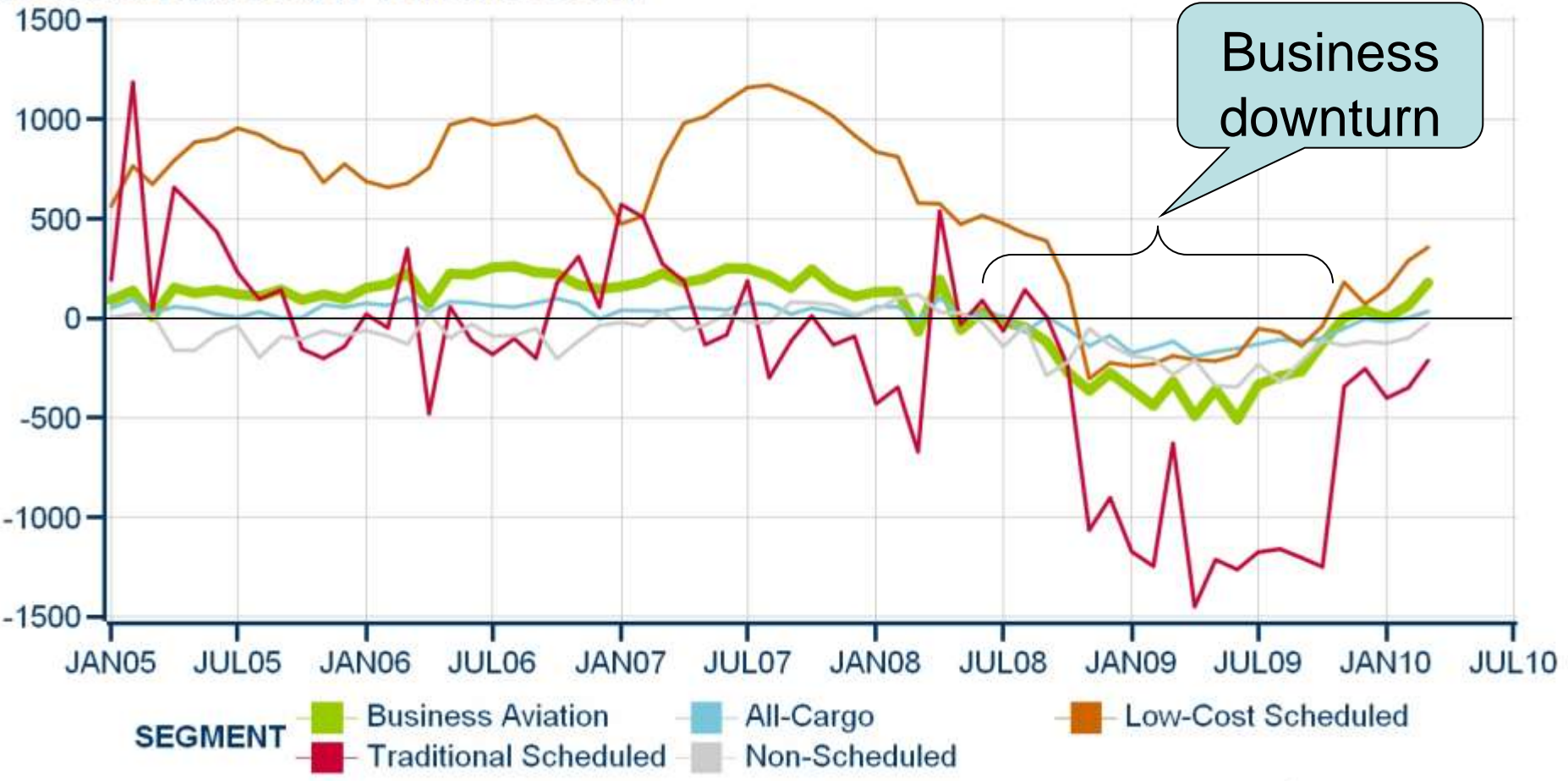
Business Aviation IFR Arrivals & Departures



Now firmly back in growth

(before the volcano)

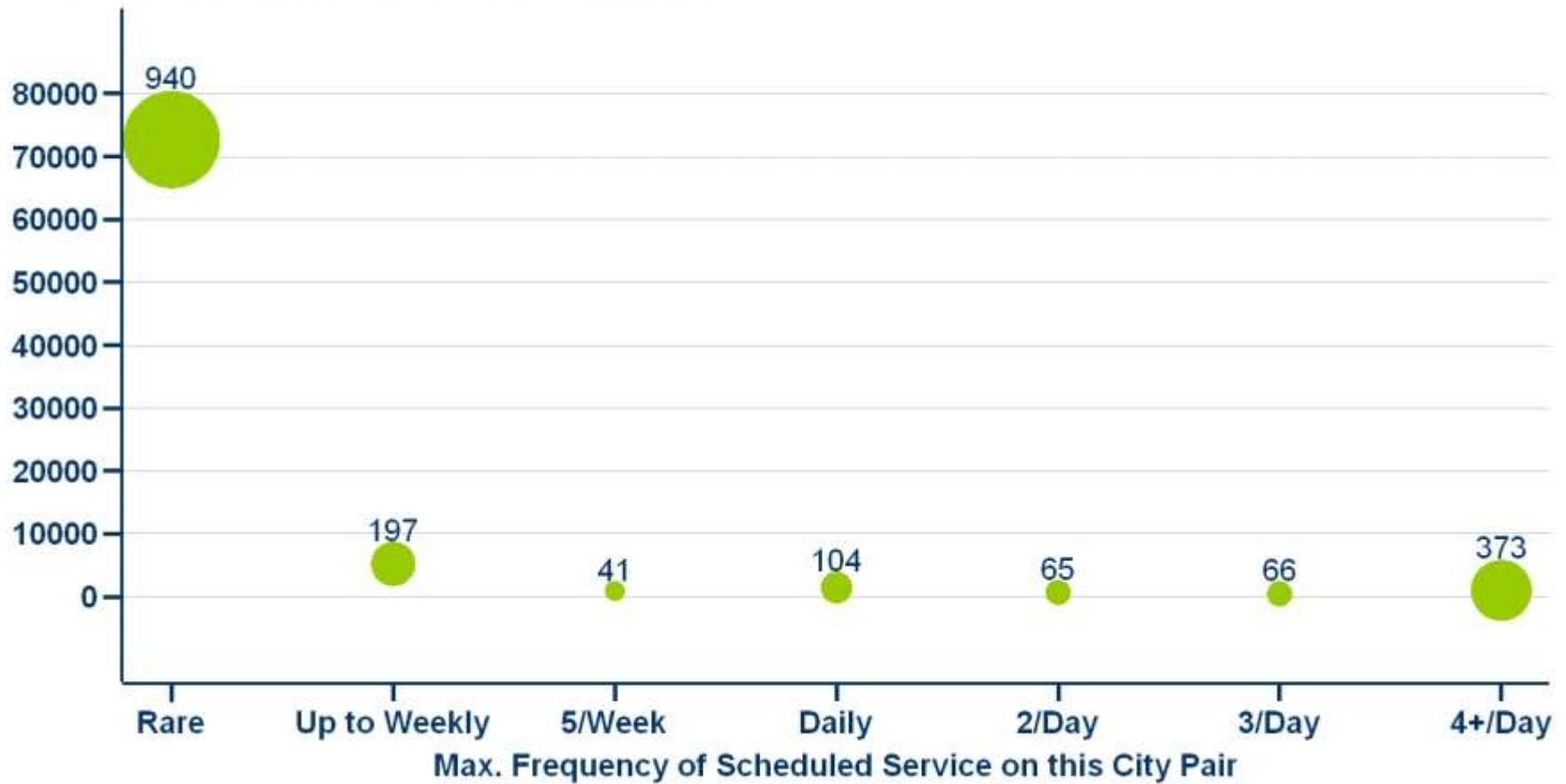
Additional Flights/Day (v 12 months before)



Business downturn

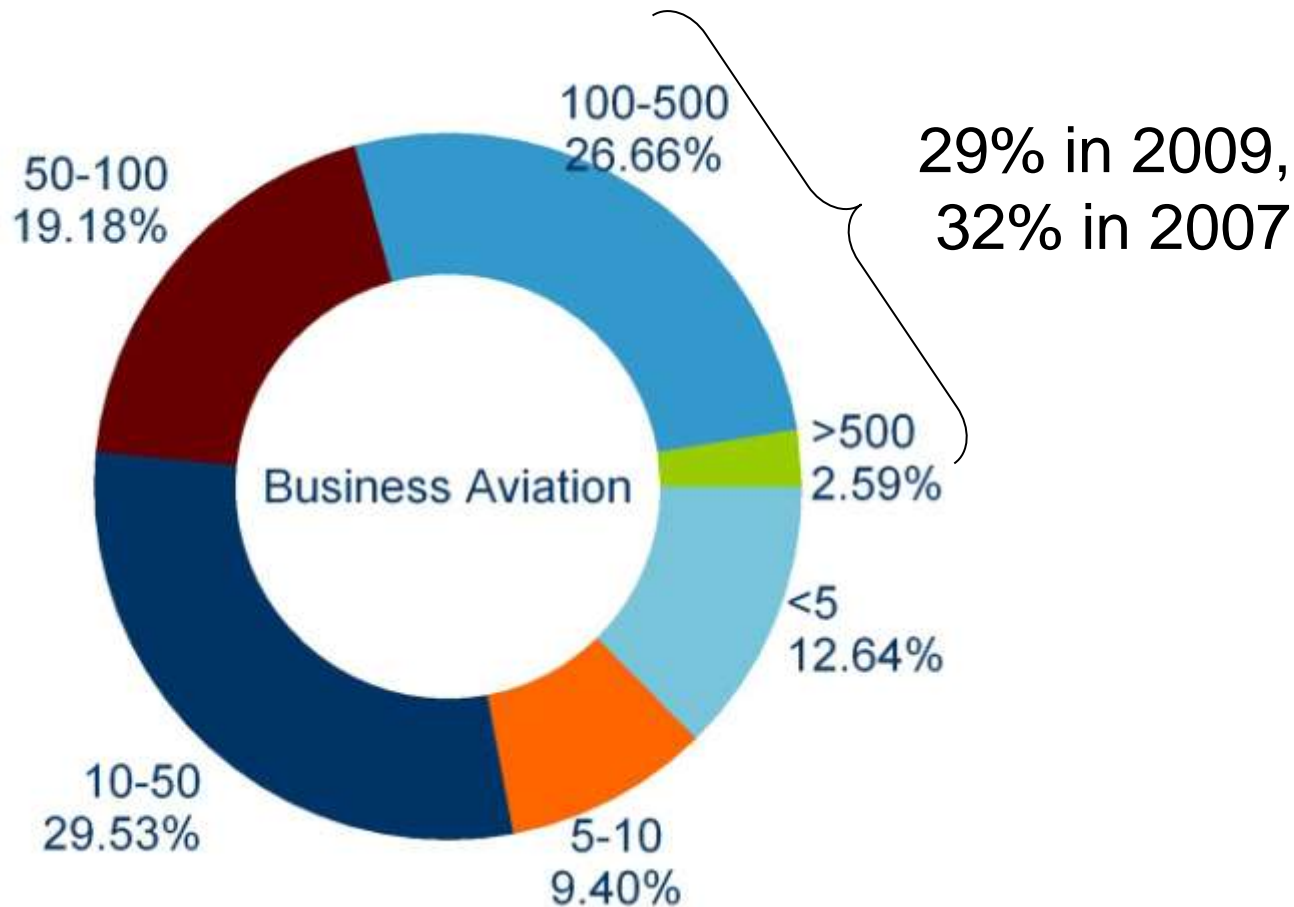
Renewed focus on the business niche

Number of City Pairs (Bubble size in flights/day)



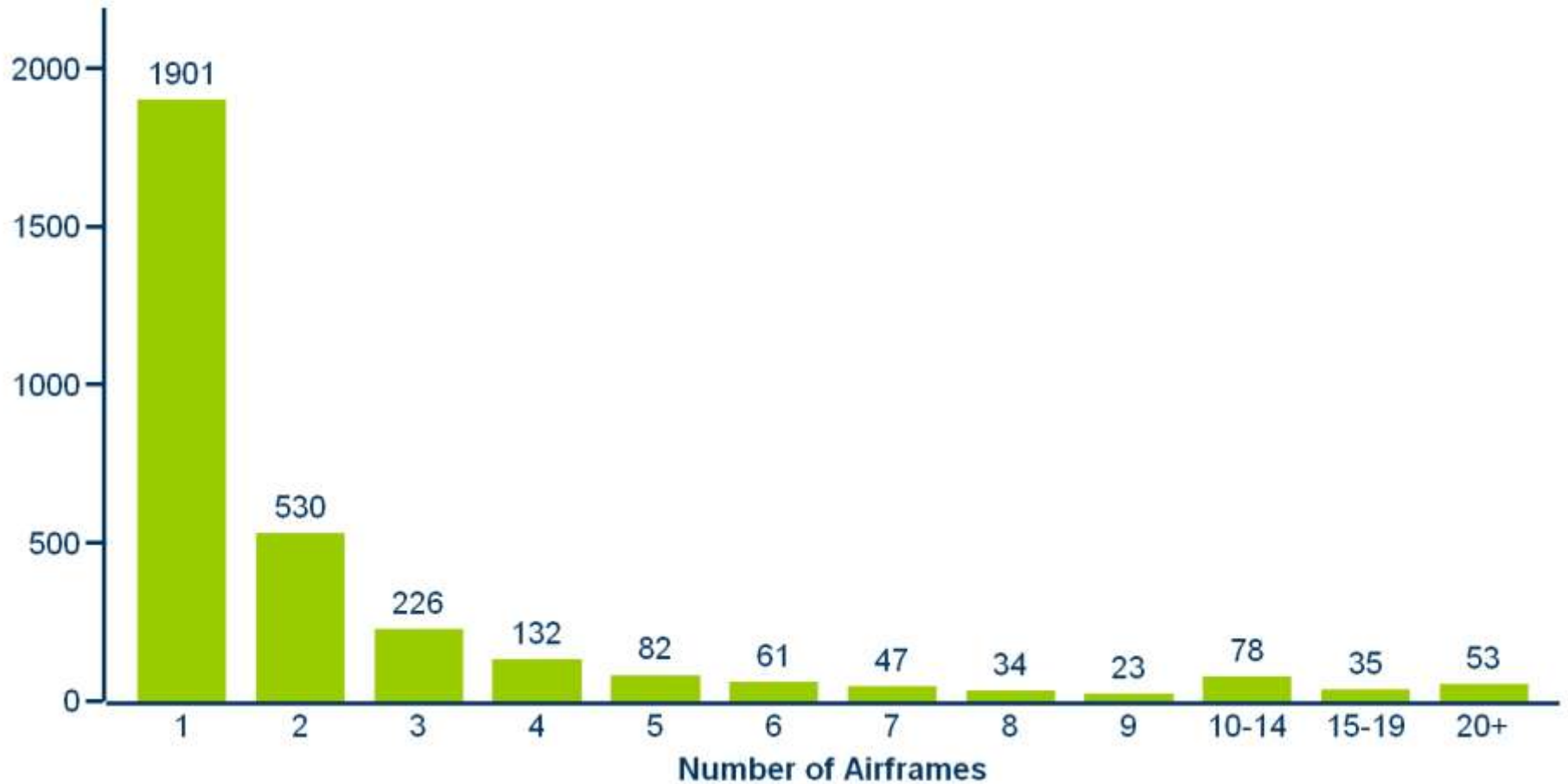
66% in 2009, only 62% in 2007

Back to smaller airports



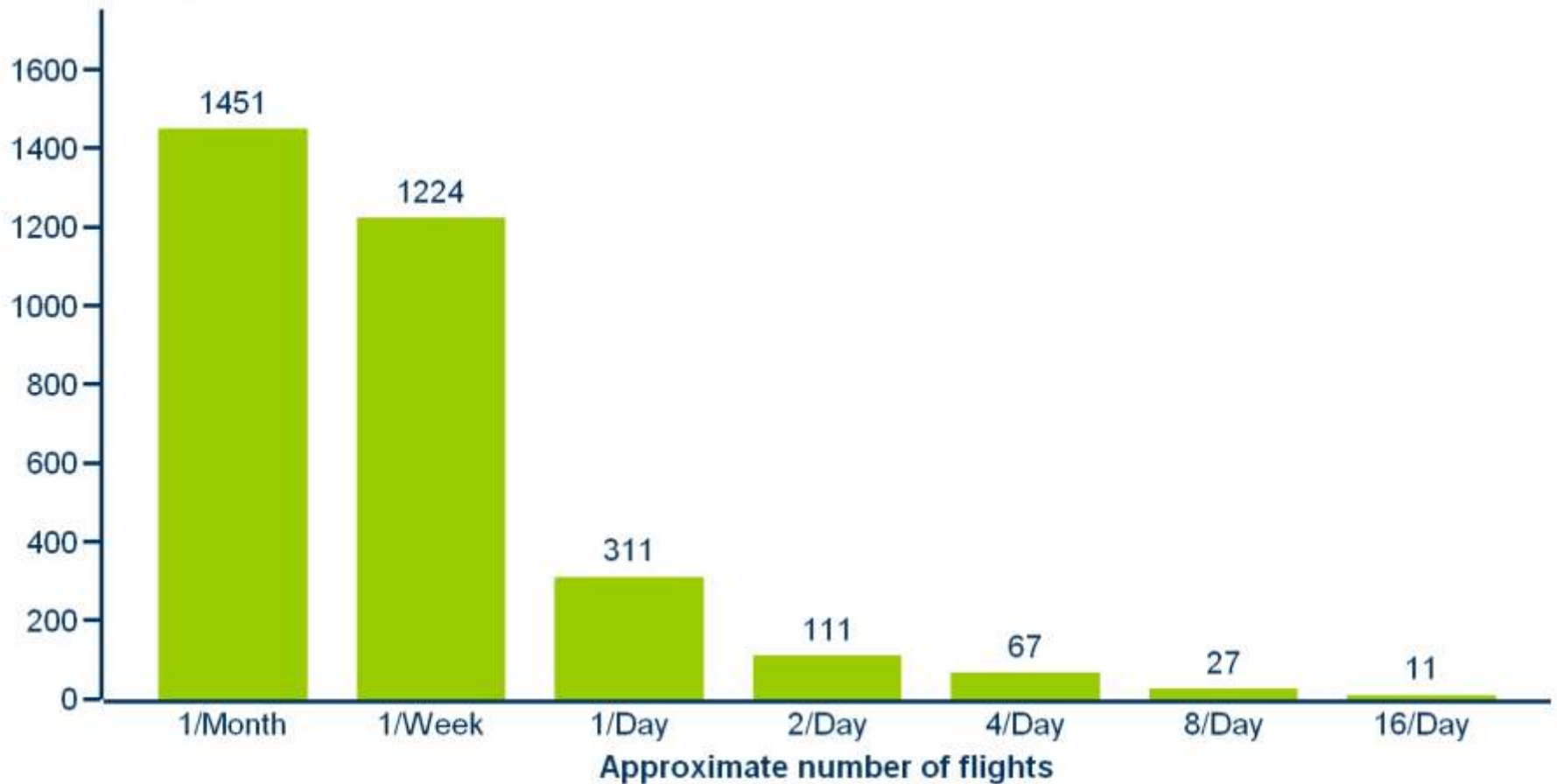
Many operators, few aircraft

Number of Operators or Agents



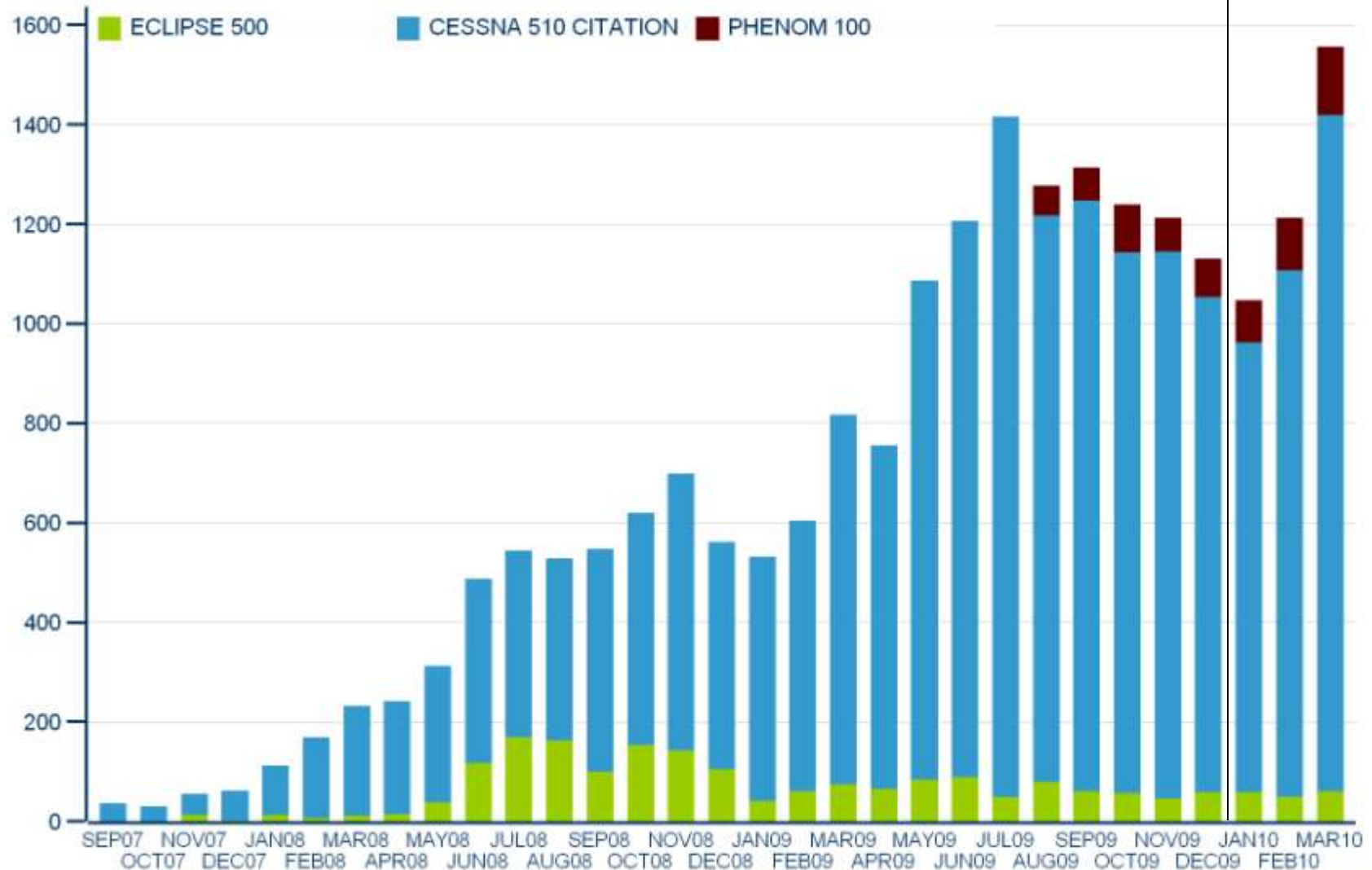
...and few flights

Number of Operators or Agents



Continuing growth of the very-light jets

VLJ Flights per month in Europe



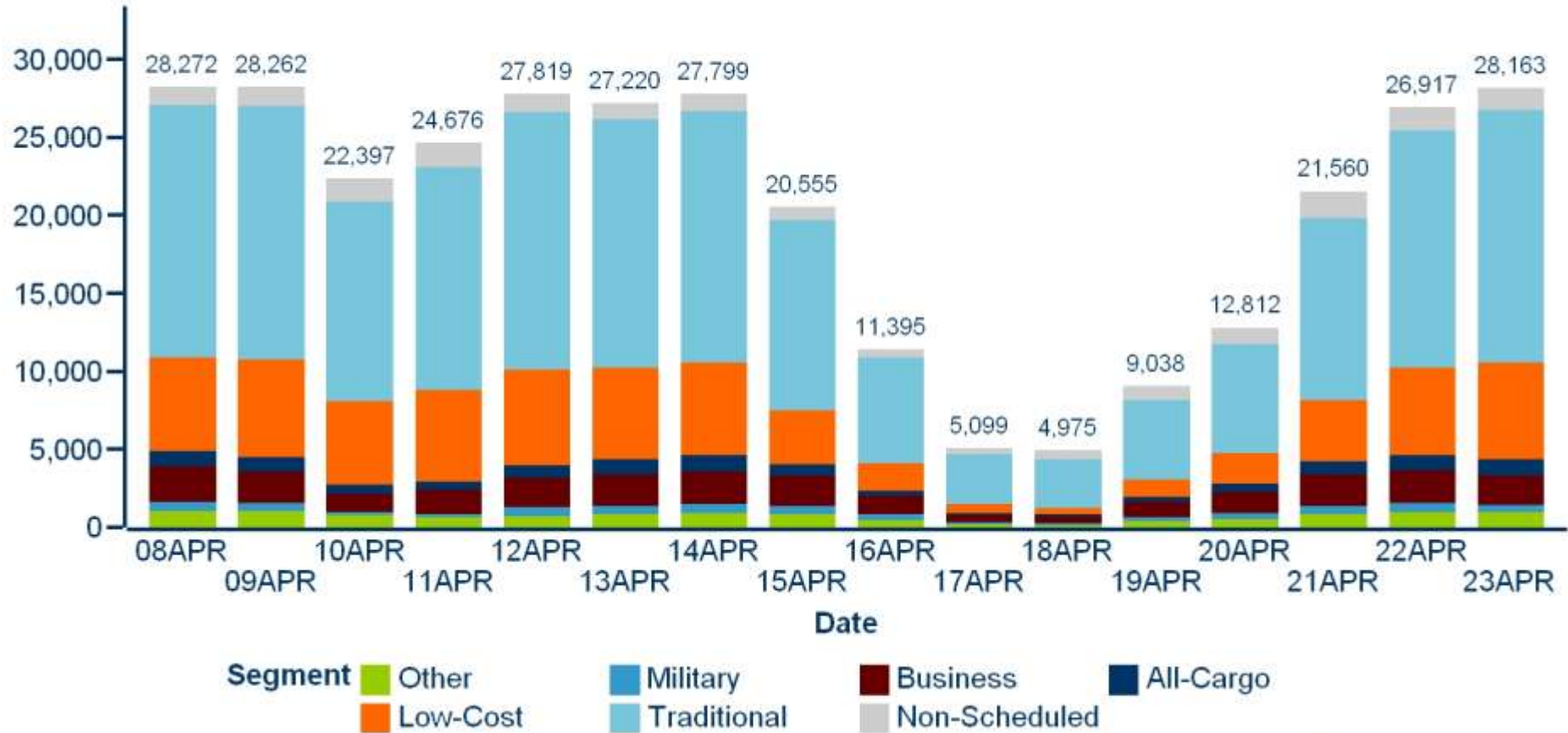
Future Growth

Growth in departures



Eyjafjallajökull

Flights in Europe



Further Information

