

# WINGX

THE  
BACA REPORT

WINGX  
Customized  
Market  
Research



**The Worldwide Association  
of Air Charter Professionals**

*Hamburg, December 15th, 2015*

[WWW.WINGX-ADVANCE.COM](http://WWW.WINGX-ADVANCE.COM)

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#### Key

R = WINGX Research, S = WINGX Survey

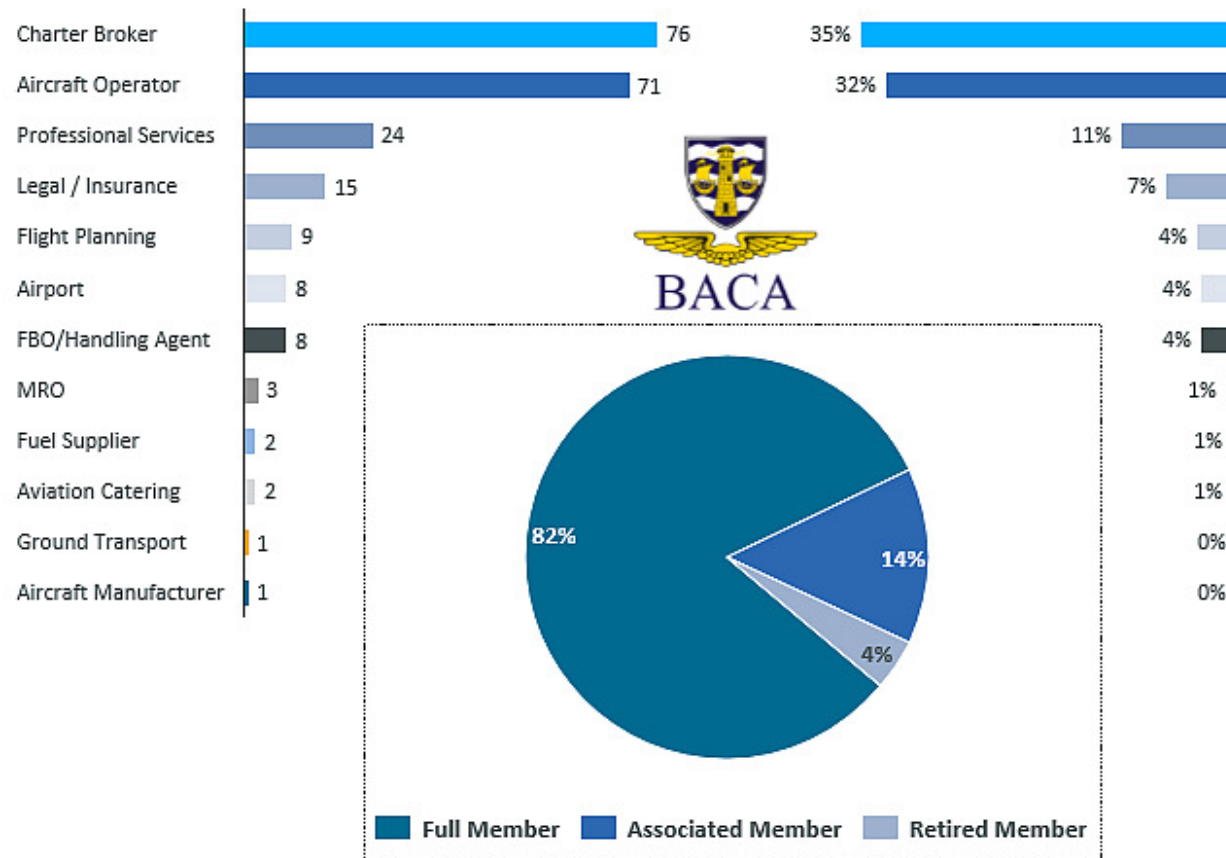
# 1. Size and Diversity of BACA Membership

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## BACA membership by Type [2015]

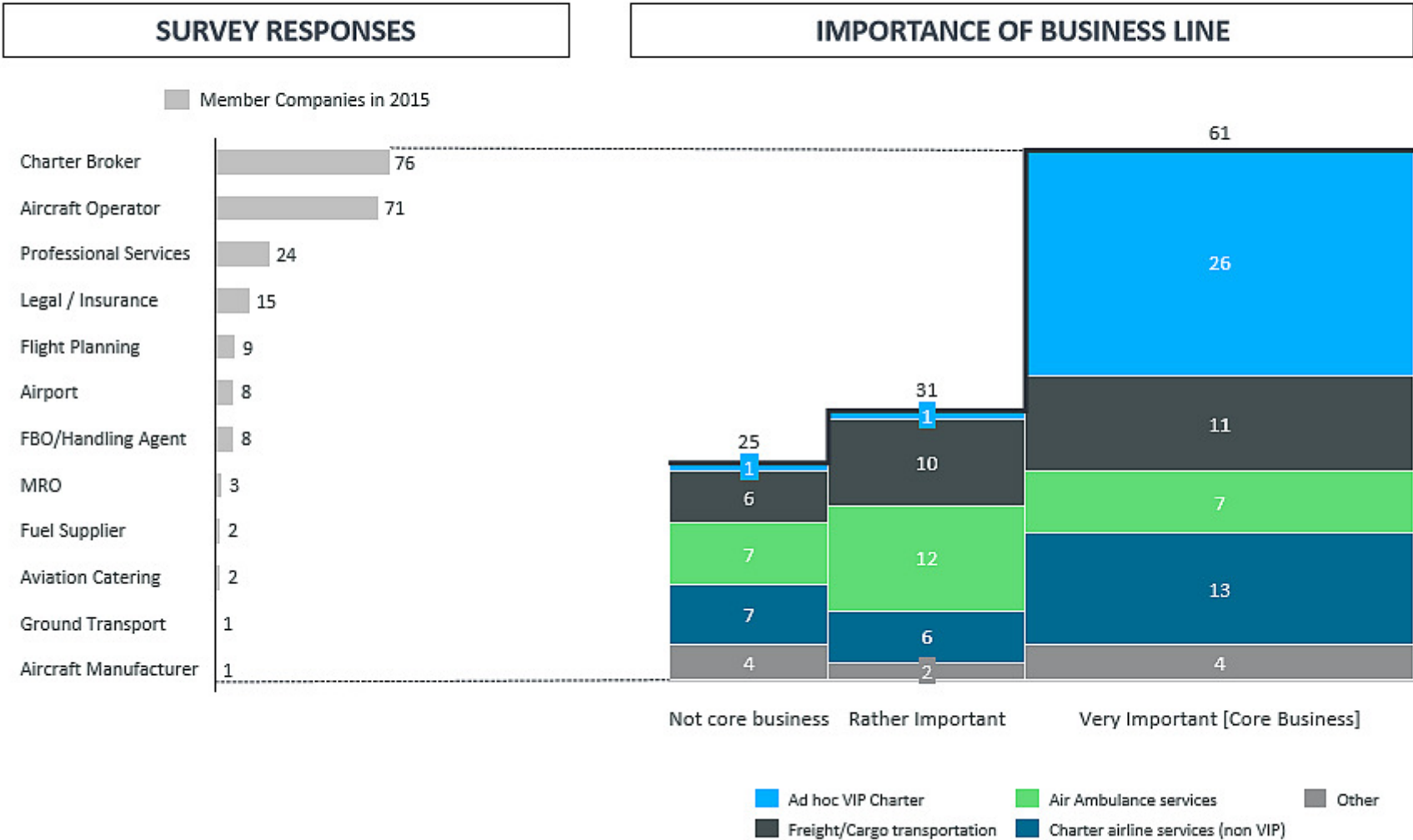
67% of BACA members are either Charter Brokers or Aircraft Operators. 180 full members.

# 220 MEMBERS



## Services Offered by BACA members\*

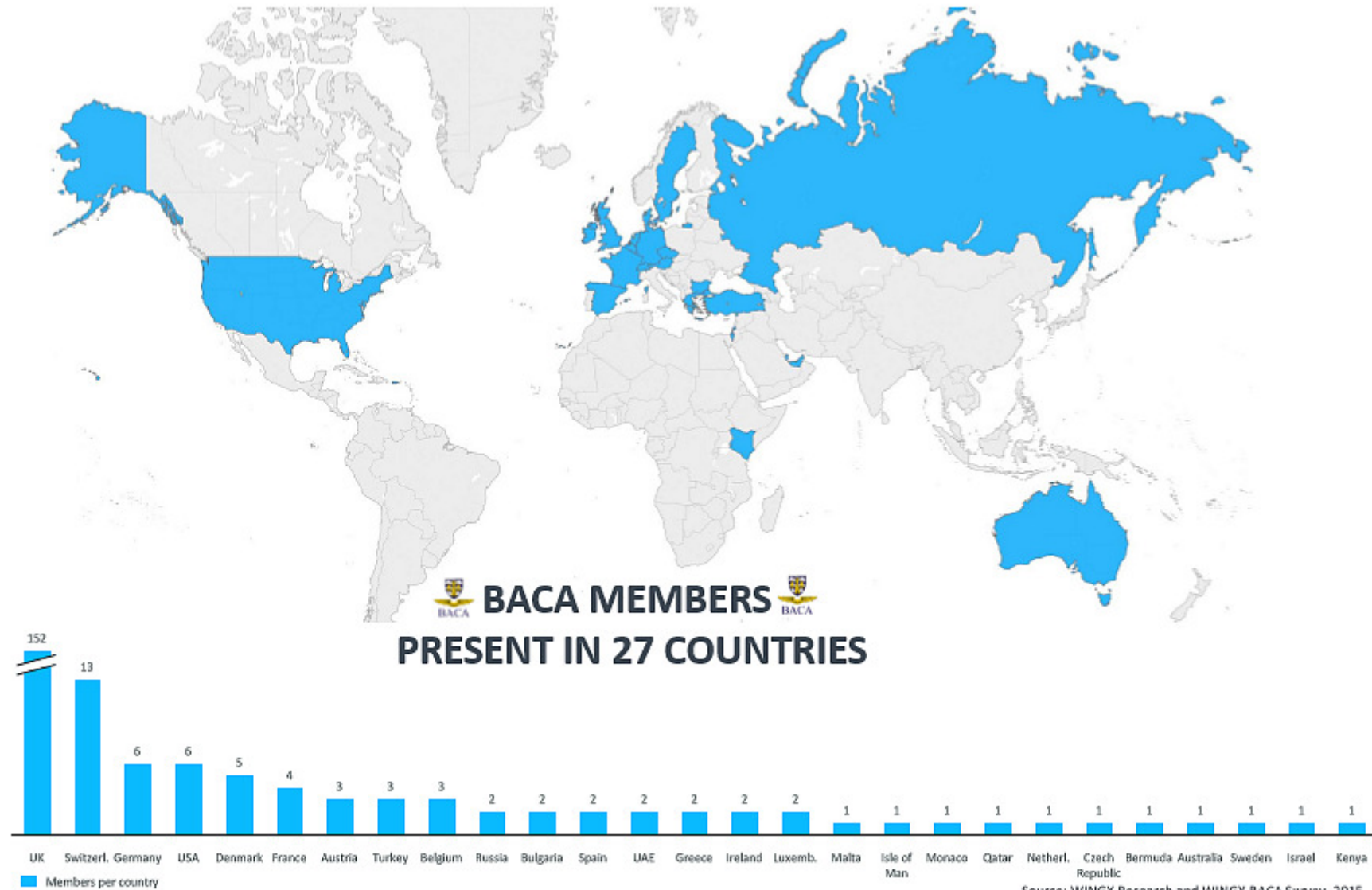
The Survey indicates that Ad Hoc VIP Charter services are considered the most importance business line. Air Ambulance is considered 'important' as well.



\*Research based on responses to Survey  
 • 30 answers received  
 • Other include "Airline ACMI", "Aircraft Remarking / Sales"

## BACA's global footprint - membership by Geography

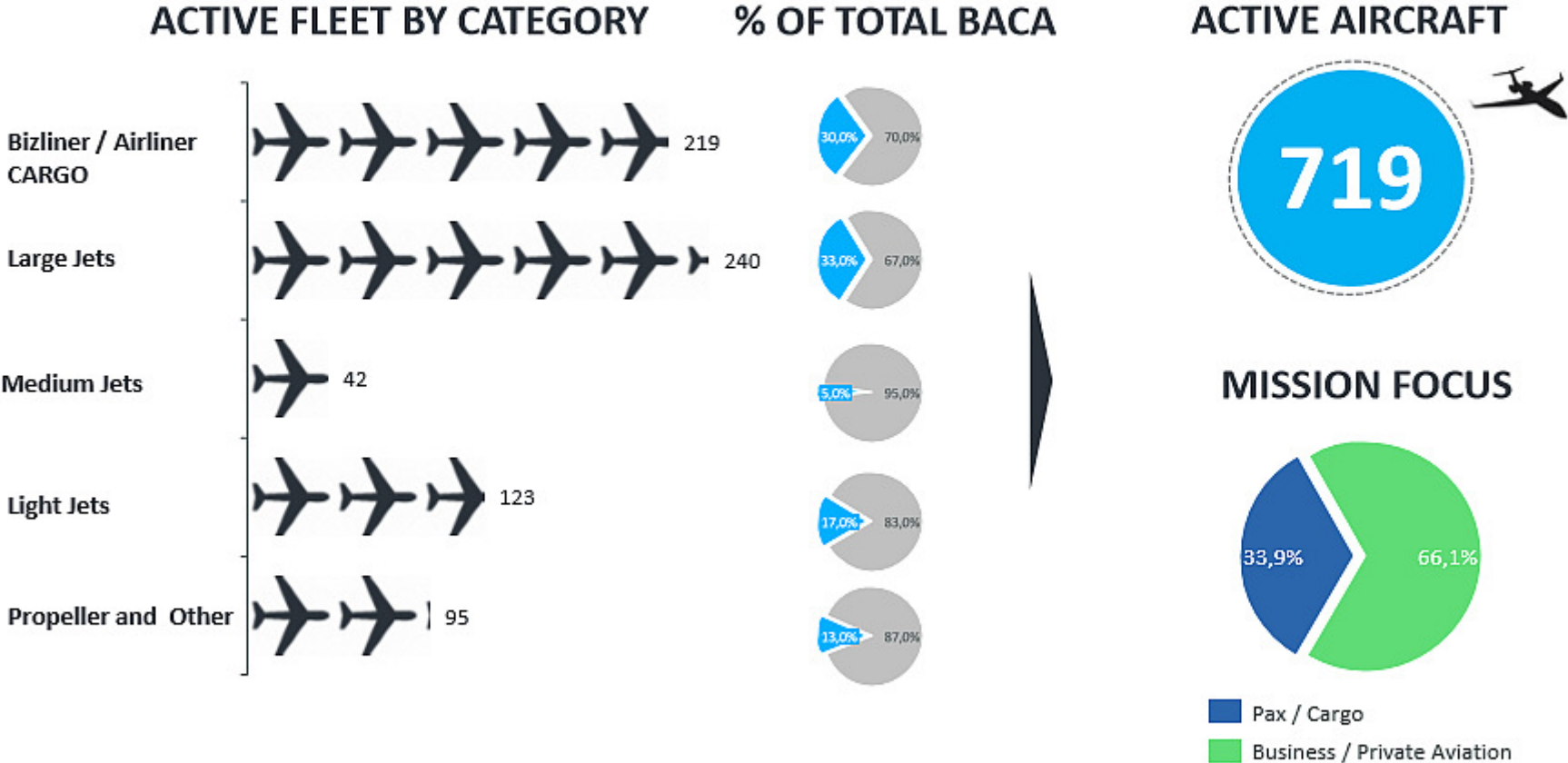
BACA membership is mainly European (and mostly UK and Western Europe), also includes members from North America, Russia, Australia, Turkey, Africa.





## 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.



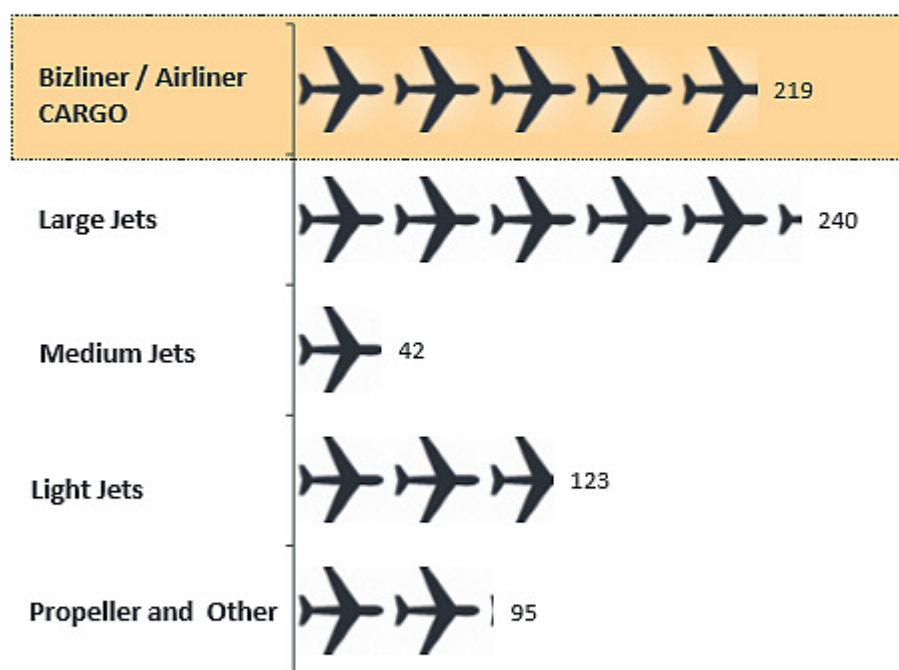
\*Mission Focus is based on operated activity in Oct YTD 2015. WINGX research on fleet data is as of 2015.

Source: WINGX Research and WINGX BACA Survey, 2015

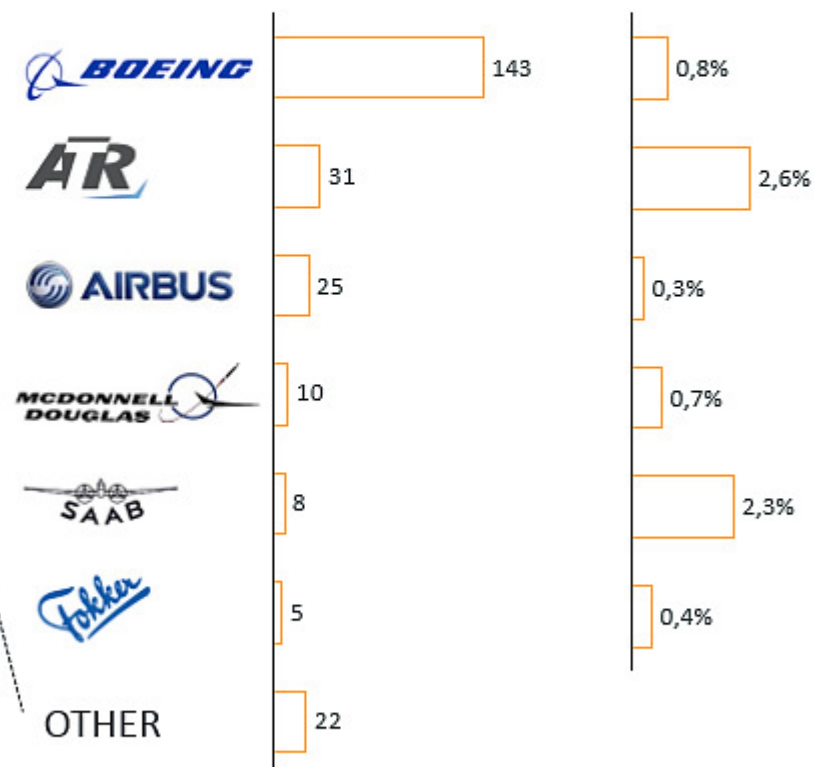
## - Active Fleet, Focus on CARGO / Passenger Aircraft

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



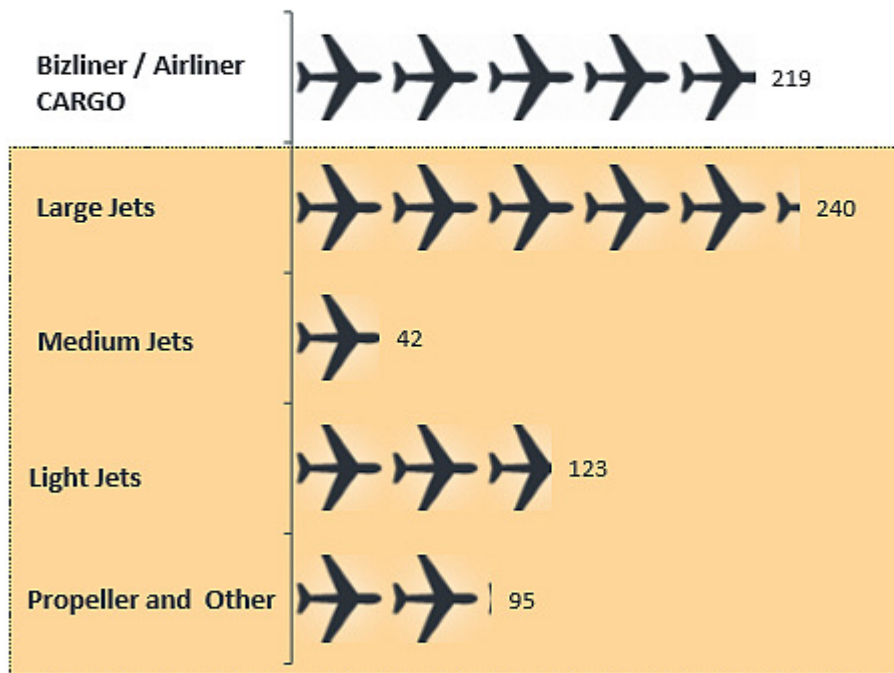
\*Global installed fleet of this OEM type of aircraft

Source: WINGX Research and WINGX BACA Survey, 2015

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

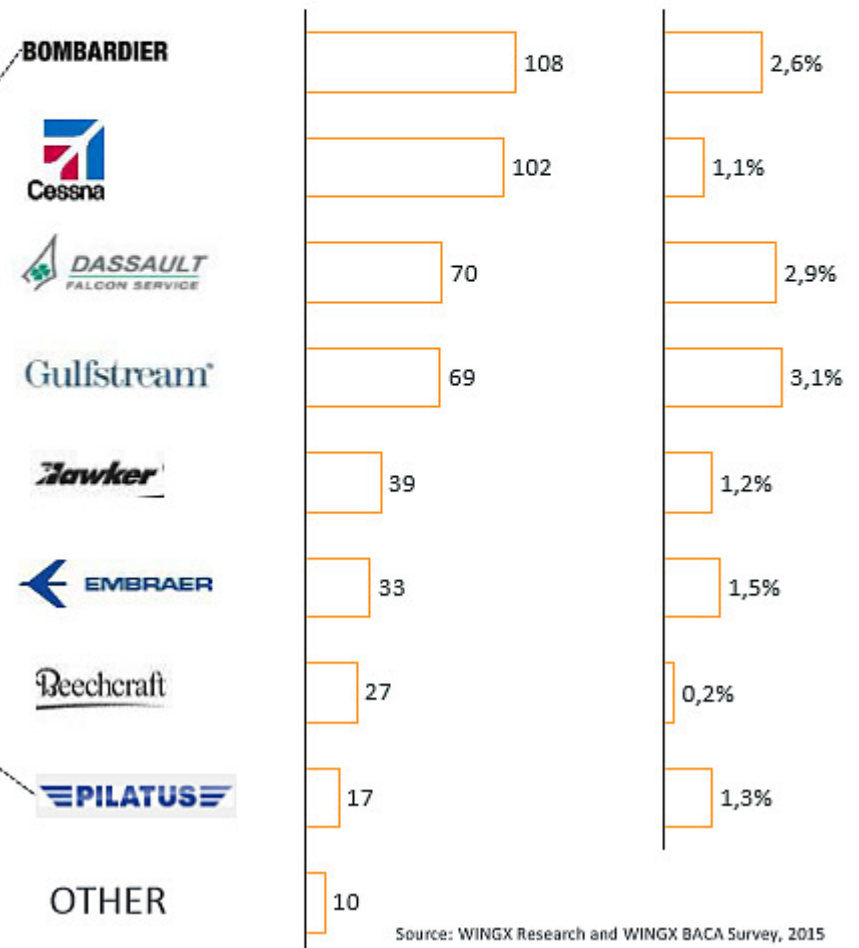
Of the 500 Business Aviation aircraft in the BACA fleet, Bombardier is best represented, numbering 2.6% of the global Bombardier business jet fleet.

### ACTIVE FLEET BY CATEGORY



Note: Bombardier includes Learjet

### BACA FLEET BY OEM AND % OF TOTAL OEM

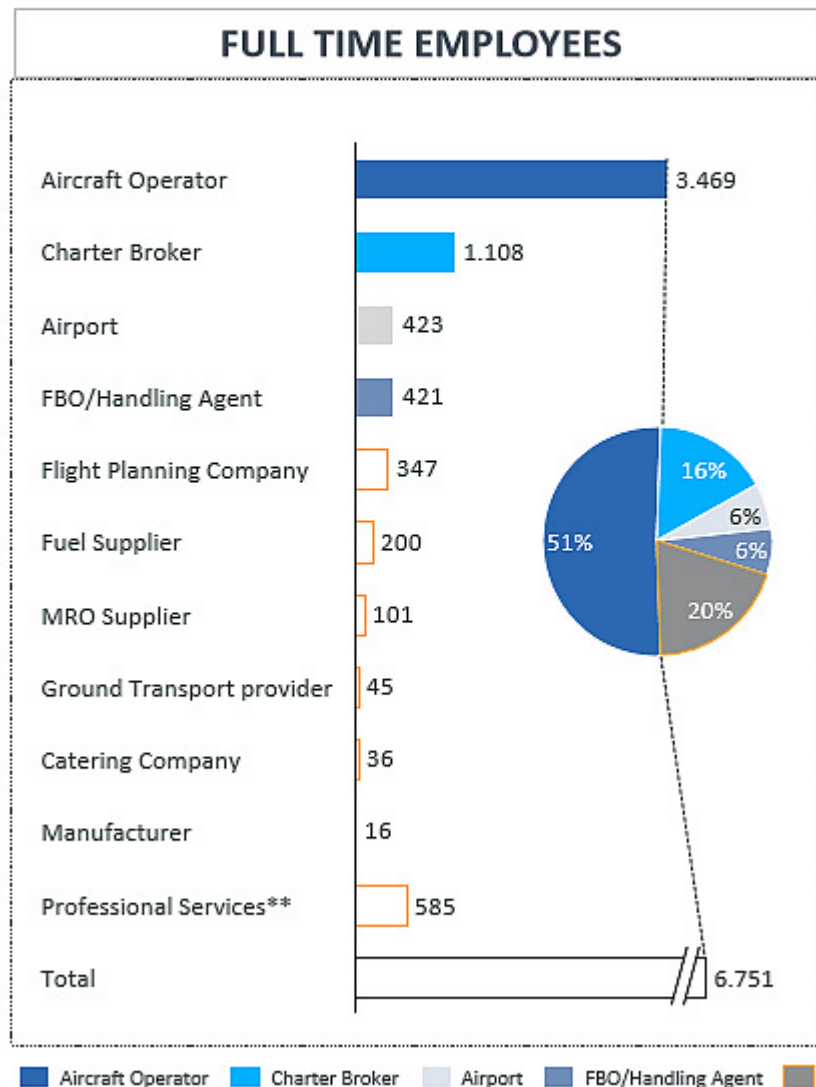


Source: WINGX Research and WINGX BACA Survey, 2015

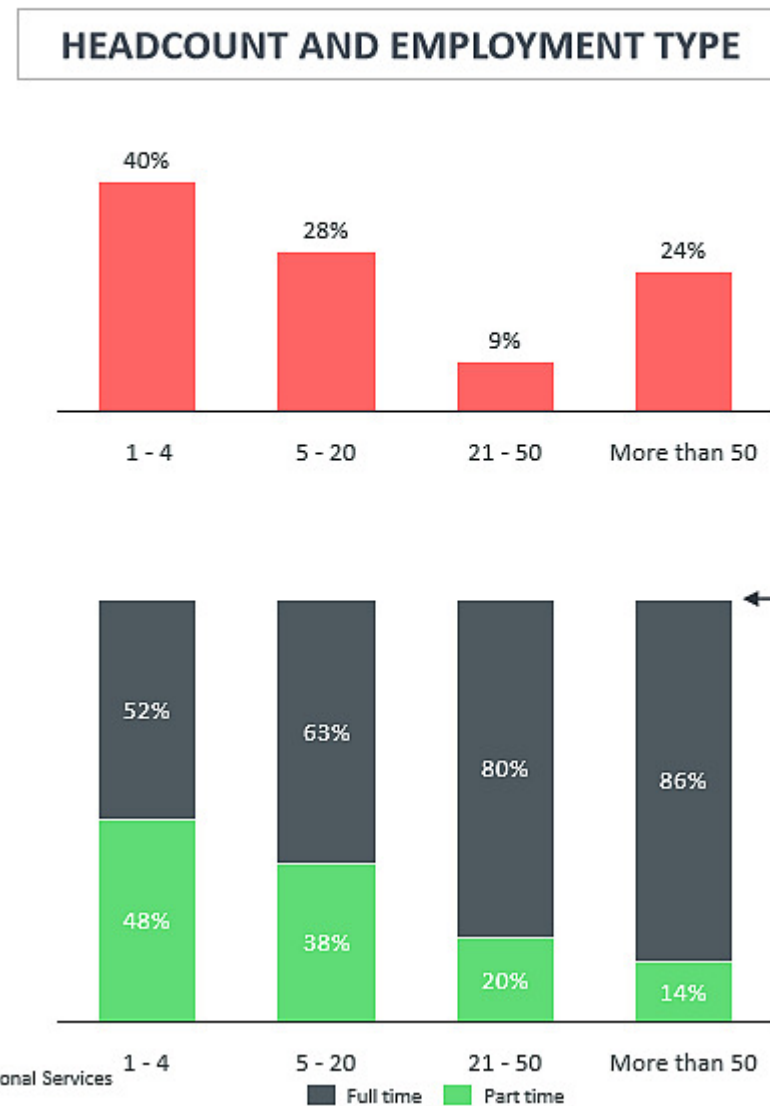


## BACA membership by # Employees\*

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.



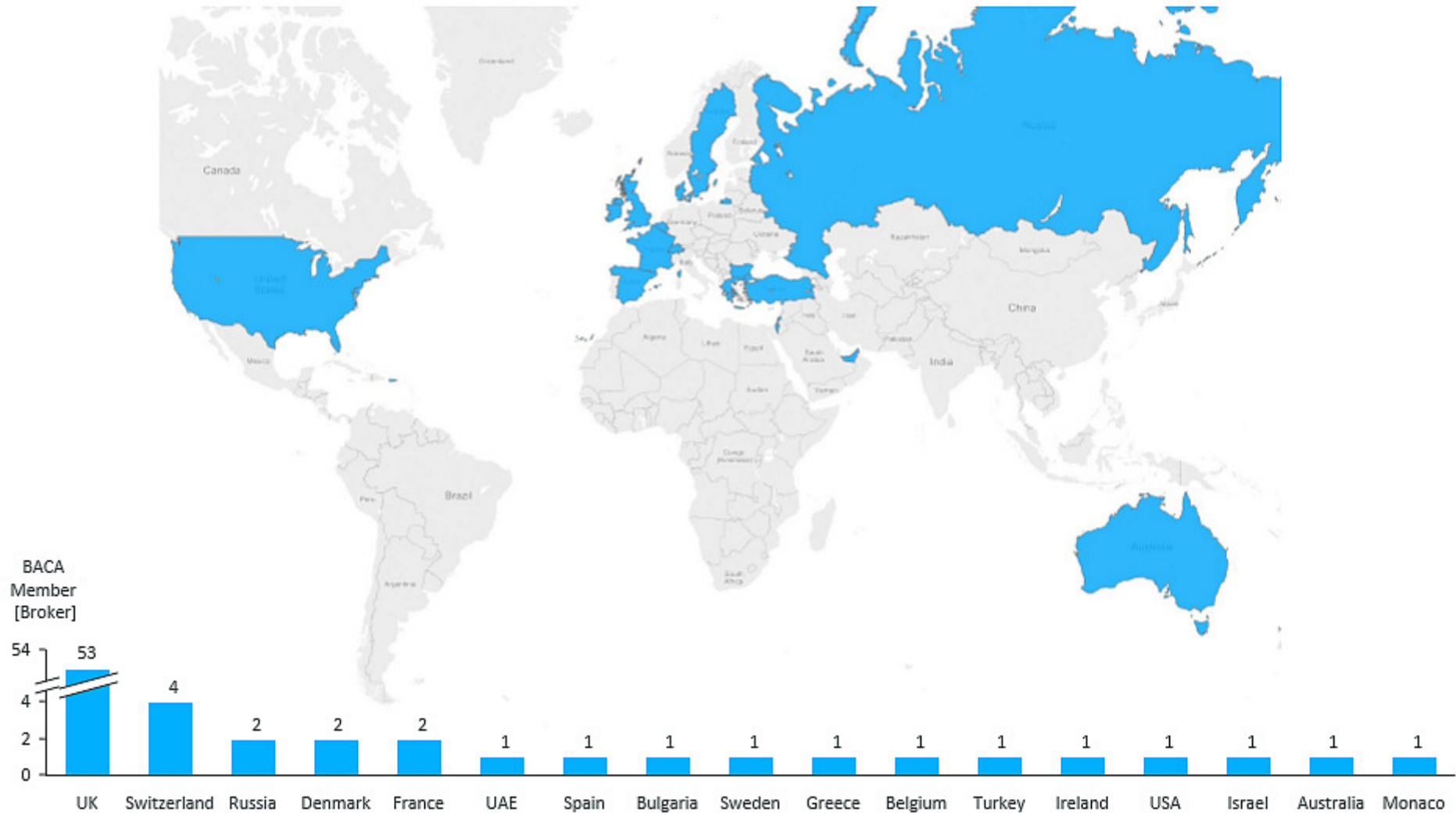
\*Research based on full year 2014 records as well as responses to Survey  
 For largest companies (ARINC, Kennedys, Willis) WINGX researched/estimated size of aviation division



Source: WINGX Research and WINGX BACA Survey, 2015

## BACA Charter Brokers, by country of representation

BACA broker population is concentrated in the UK (53 members). Switzerland is well represented. Only 1 US broker.

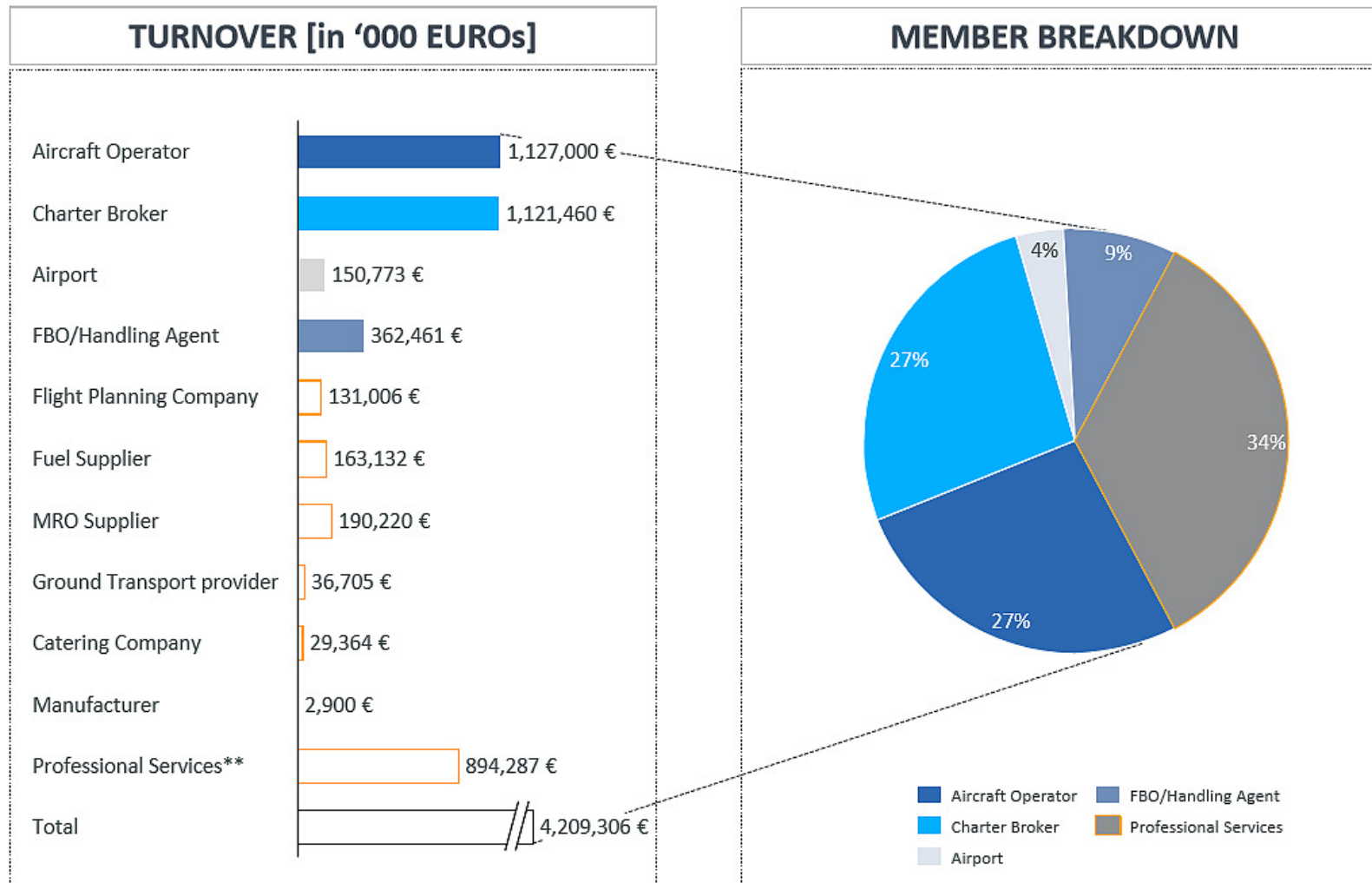


## 2.

## 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.

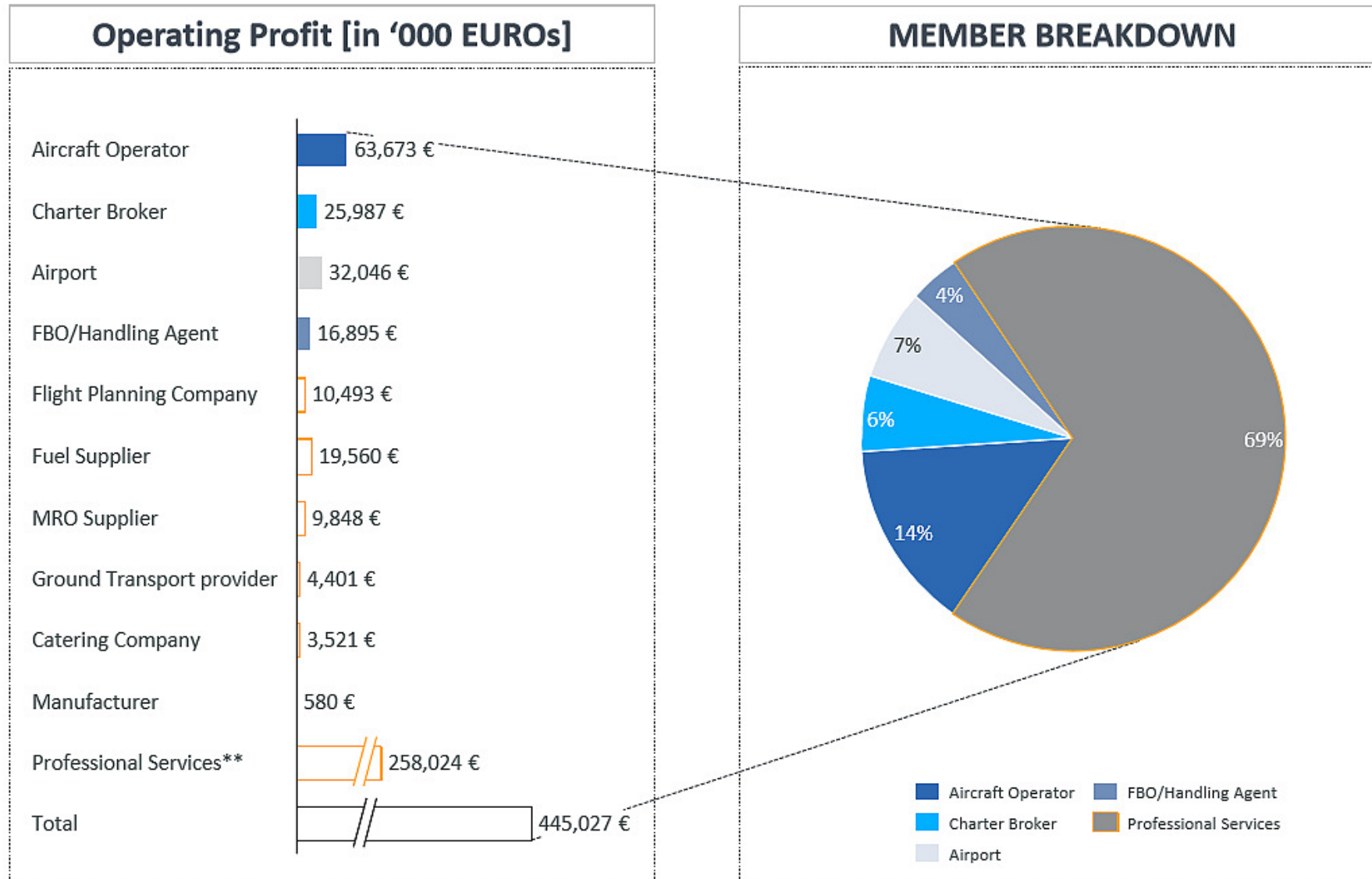


\*Research based on full year 2014 records (mainly 'duedil') as well as responses to Survey

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

## BACA membership by Pre-tax Profit\*

Available data indicates that Operator and particularly Charter Broker margins are very thin, compared to much larger pre-tax profits for Professional Service Companies.

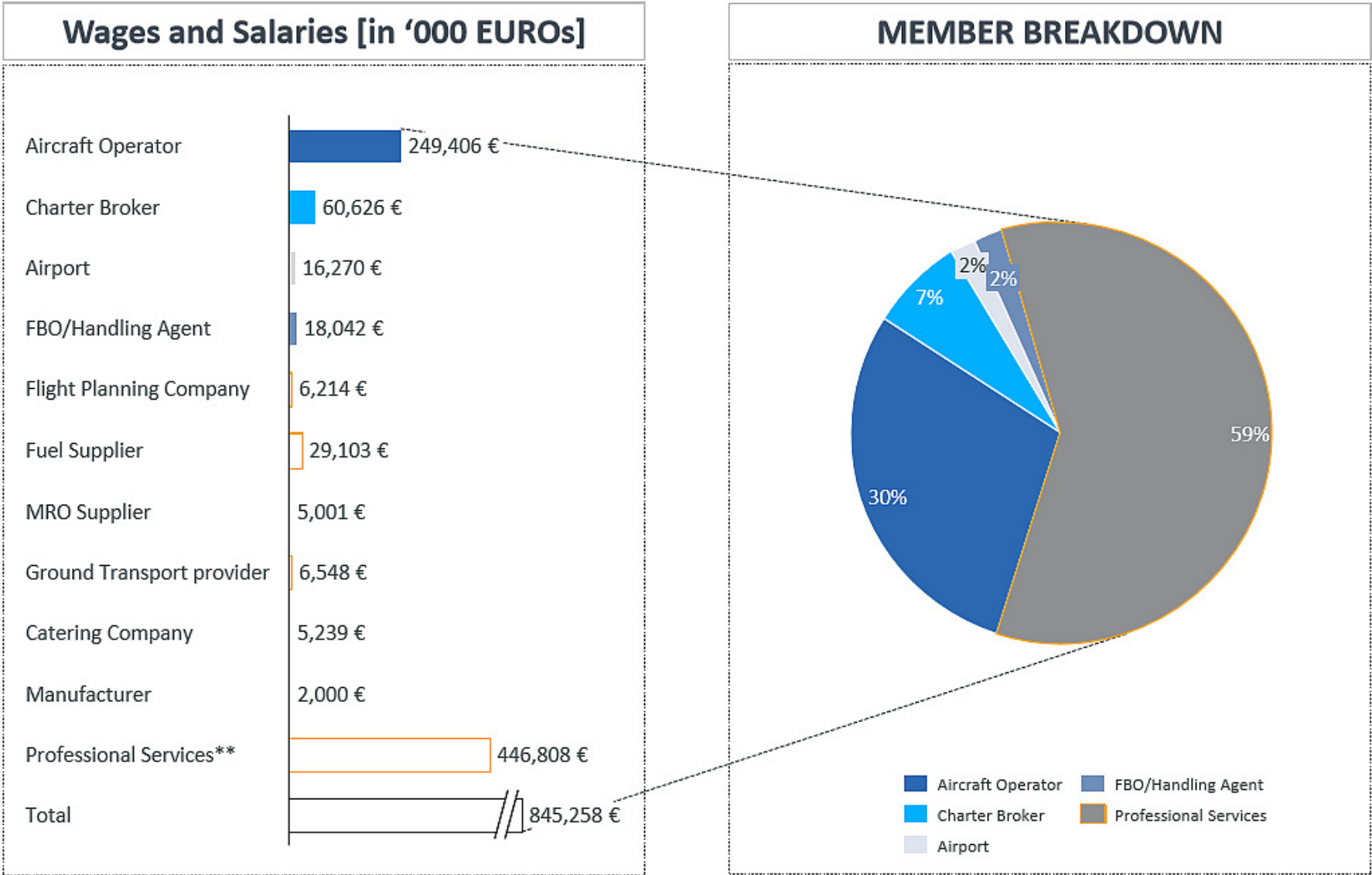


\*Research based on full year 2014 records as well as responses to Survey

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

## BACA membership by Wages and Salaries\*

Estimated that BACA members had an aggregate wage bill of €845M in 2014.



\*Research based on full year 2014 records as well as responses to Survey  
 \*\*Professional Services includes: Finance, Legal, Insurance, Corporate, Consulting



### 3. Flight Activity Footprint

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#### Operator Members: 2015 activity footprint, globally

As of October 2015, BACA members have operated 126,000 flights, using 1152 airports, connecting 146 countries and over 25,000 city pairs around the world.



FLIGHTS

125.887



FLIGHT HOURS

207.530



AIRPORTS USED

1.152



CITY PAIRS FLOWN

24.659



COUNTRIES SERVED

146



PAX TRANSPORTED

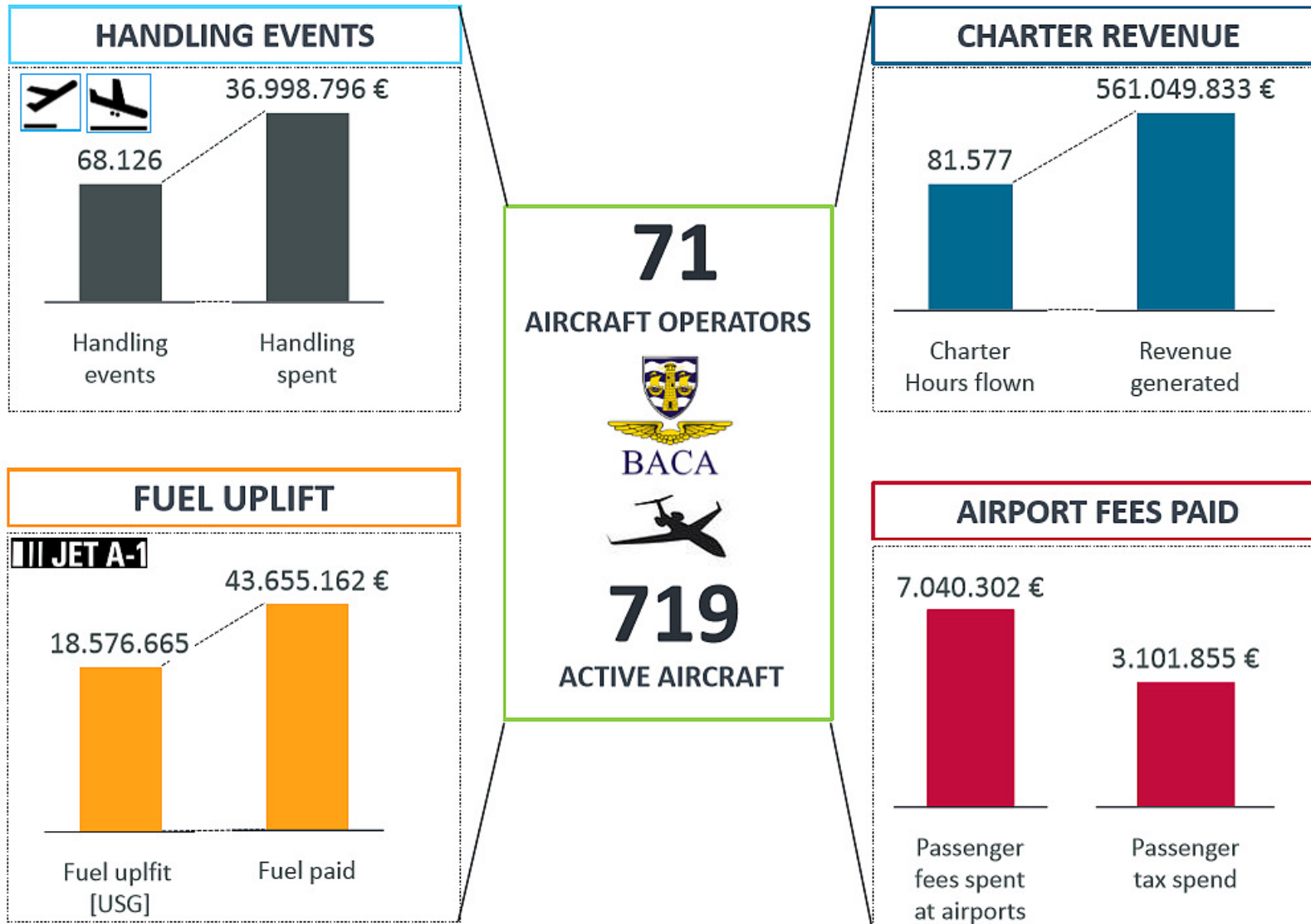
185.053

Note: Shows all aircraft activity of BACA member operators. In all flight activity charts, WINGX research is October 2015 YTD.

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.



Note: Calculations based on WINGX activity tracking and associated market unit pricing, as researched by WINGX. Business Aviation and Pax only (ex Cargo)  
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Source: WINGX Research and WINGX BACA Survey, 2015 12/15/2015 |

## 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

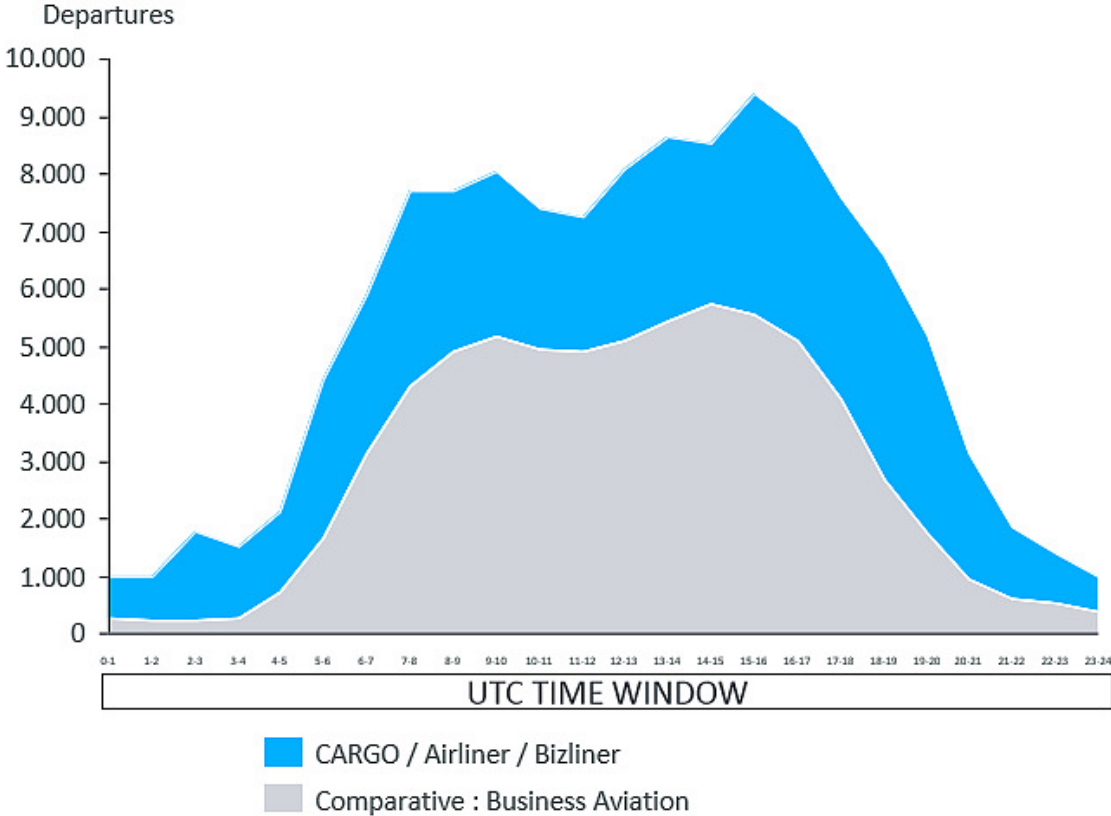


**CITY PAIRS FLOWN** 3.949



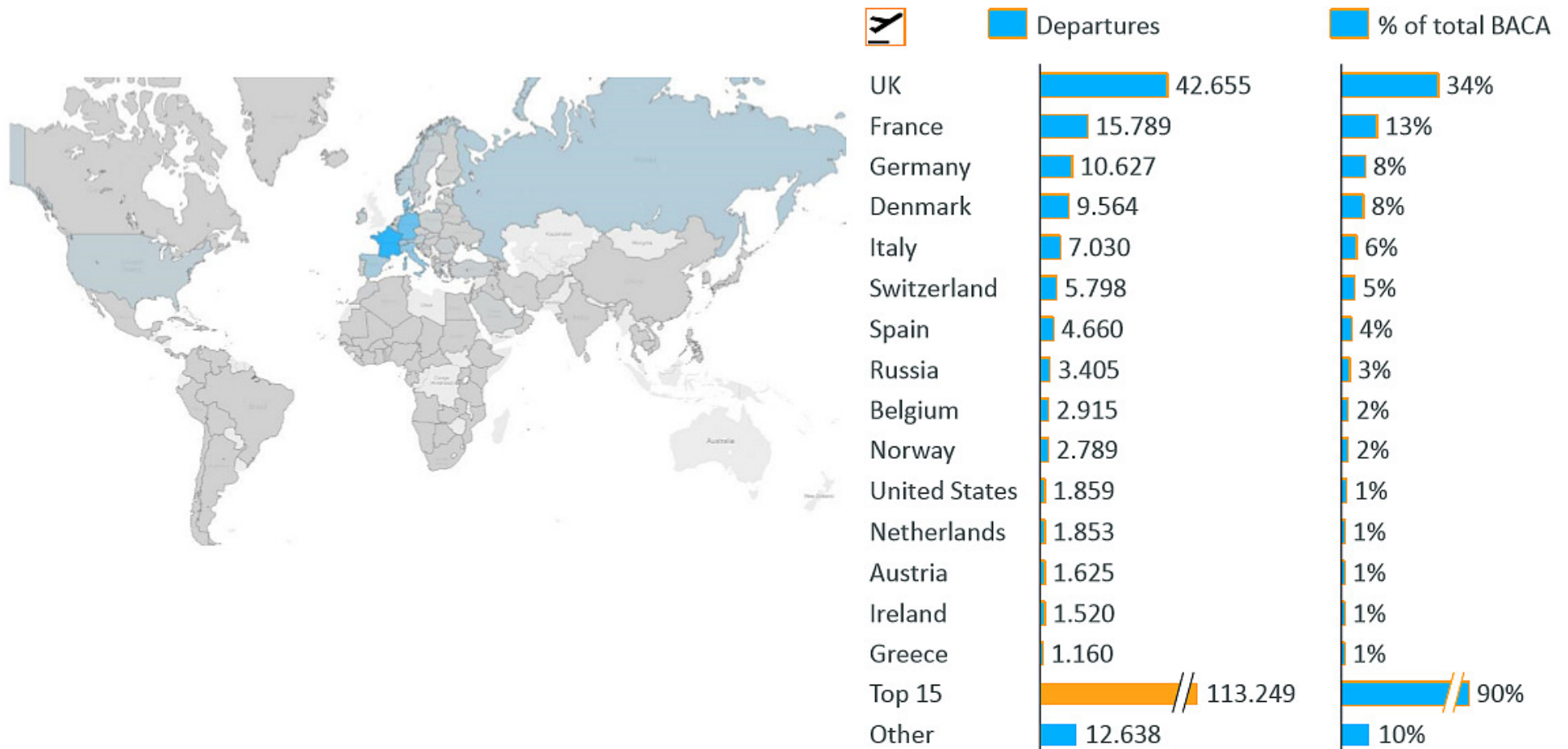
**COUNTRIES SERVED** 107

### 24H OPERATION



## 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 YTD 2015. Next busiest countries are France and Germany.



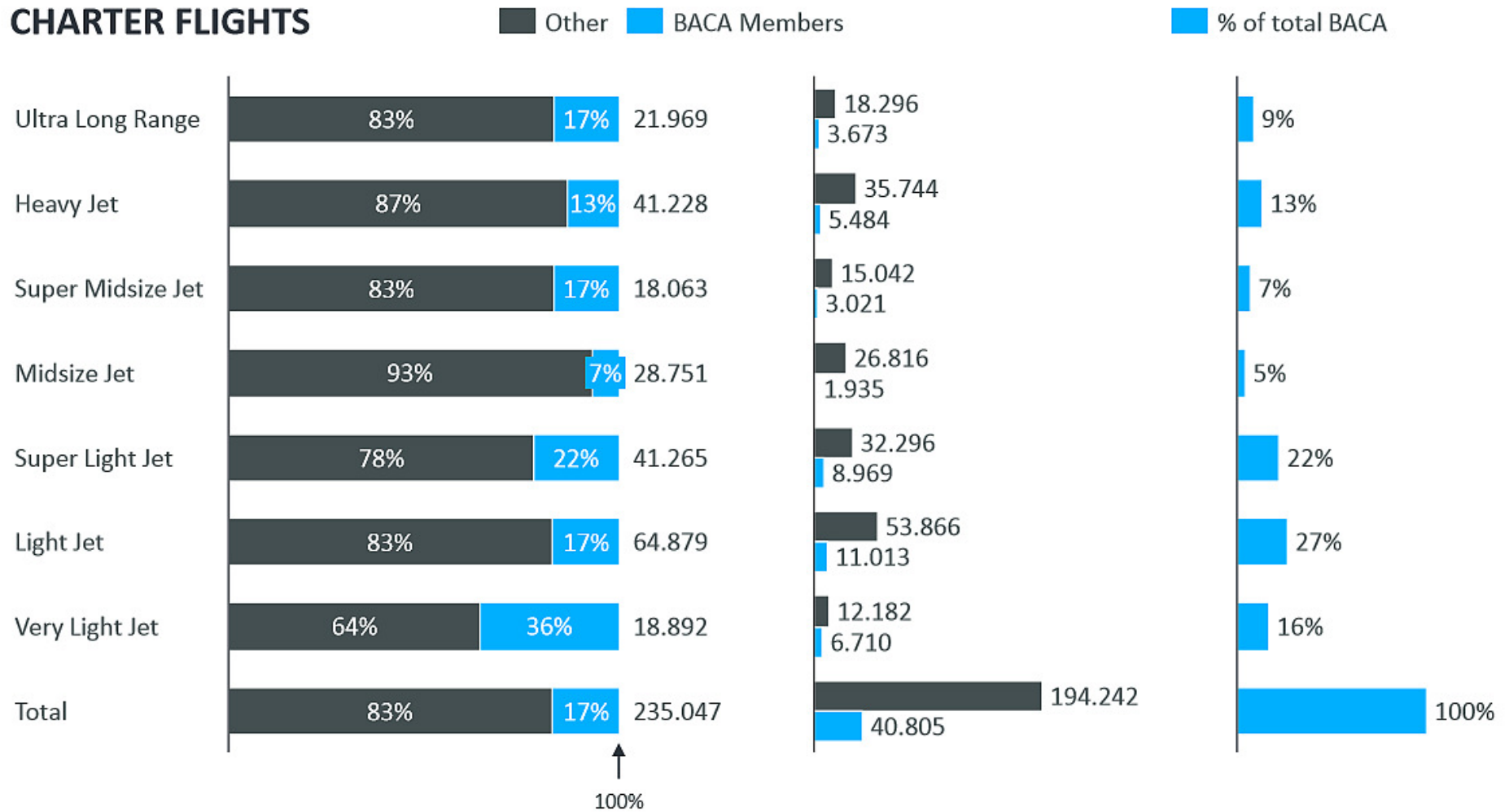
Note: All flights, all mission types, all aircraft operated by BACA member operators

Source: WINGX Research and WINGX BACA Survey, 2015

## Flight activity footprint, based on Charter departures, from Europe\*

In 2015 BACA operators have flown 41K business jet charter sectors, 17% of all business jet departures in Europe. BACA operators have a relatively larger share of light jet flights.

### CHARTER FLIGHTS



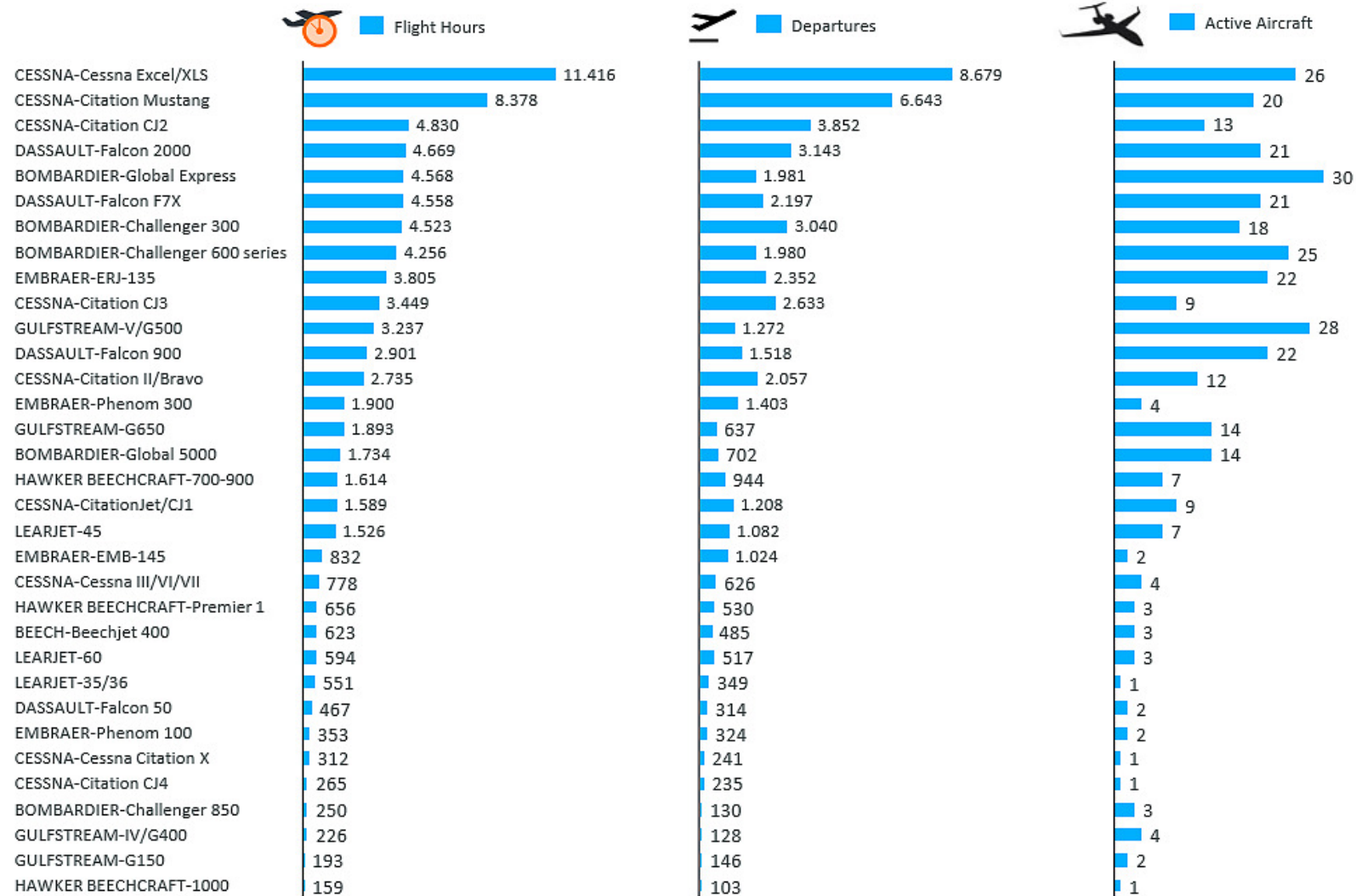
Note: Business Jet flights, Charter flights only, BACA member operators

Source: WINGX Research and WINGX BACA Survey, 2015



## 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 8679 sectors. The busiest large cabin type is the Falcon 2000.



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

Source: WINGX Research and WINGX BACA Survey, 2015

# WINGX

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