



PRIVATEFLY

Private Jet Charter Trends

Annual edition: 2018

Private Jet Charter Trends

2018 has been an exceptionally busy year at PrivateFly. We flew more people, to more places, than ever before. And it was a year to celebrate: Firstly our 10th birthday in March, followed by our acquisition by Directional Aviation in September.

Our new, bigger global footprint, combined with the backing of one of the world's leading aviation groups, means we have exciting plans for 2019 - bringing even more innovation, value and efficiency to our customers, suppliers and partners.

This edition of *Private Jet Charter Trends* report uses data from our thousands of searches and booked flights, to take a look back at the whole year.



These are some of the findings from the annual 2018 report:

- Our top destinations were London & Paris, with New York & Las Vegas also making the Top 10, alongside European leisure hotspots.
- We saw spend per flight slightly up on 2017 levels, and a consistent mix of demand across aircraft types.
- The Hawker 800 and Gulfstream GIV were amongst our top 10 most chartered aircraft, alongside a number of Cessna models.
- Lead times were slightly longer, with fewer clients booking to fly within a week (50% versus 54% in 2017). Frequent flyer clients are becoming aware of the need to book ahead at peak times to secure availability.
- 26 May was our busiest day of the year for take-offs, due to the Cannes Film Festival, Champions League Final and public holiday weekends in both the UK & US.
- Our clients' mobile usage for flight search & booking has grown significantly in a year - now at 51% (versus 39% in 2017).

Enjoy the findings and do let us know any feedback.



Adam Twidell
CEO

Where are private jet customers flying?

Our top 10 global destinations



4. Ibiza
5. Palma de Mallorca
6. Malaga
7. New York
8. Geneva
9. Nassau
10. Las Vegas

Major cities feature in our busiest destinations list, with London and Paris in the top two spots, and New York City at #7.

The importance of Europe's leisure market is also clear with sunshine hotspots Nice, Ibiza and Palma flying high.

Popular routes and prices

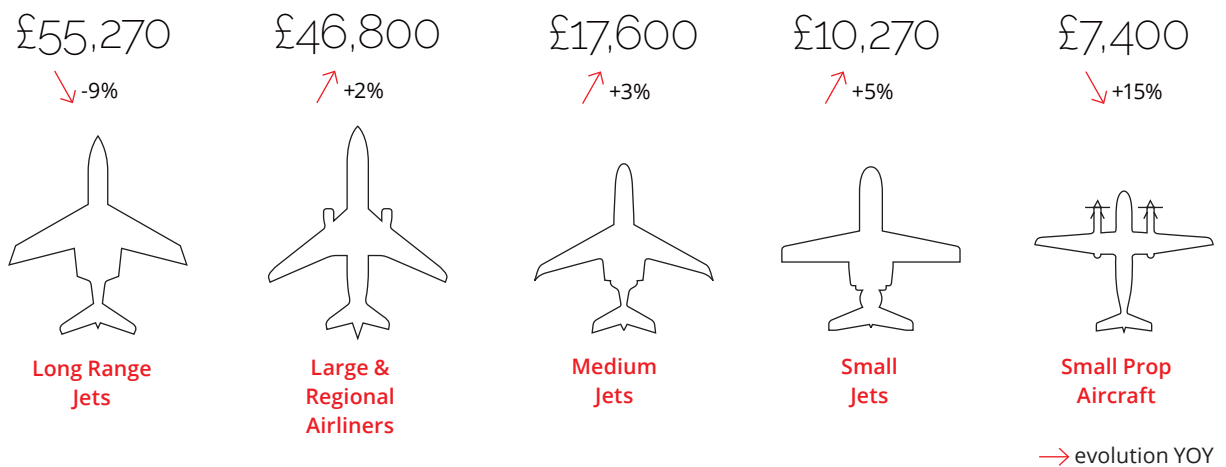
(and how much they cost*)

London - Paris	→	€7,800 on a Citation CJ2 (6 seats)
Los Angeles - Las Vegas	→	\$5,500 on a Phenom 100 (4 seats)
London - Nice	→	€10,150 on a Piaggio Avanti (7 seats)
Paris - Geneva	→	€5,880 on a Citation Mustang (4 seats)
New York City - Miami	→	\$25,800 on a Challenger 300 (8 seats)

* estimate prices for a one way flight

How much do private jet customers spend?

Average spend per charter in 2018



Private jet customers spent more in 2018

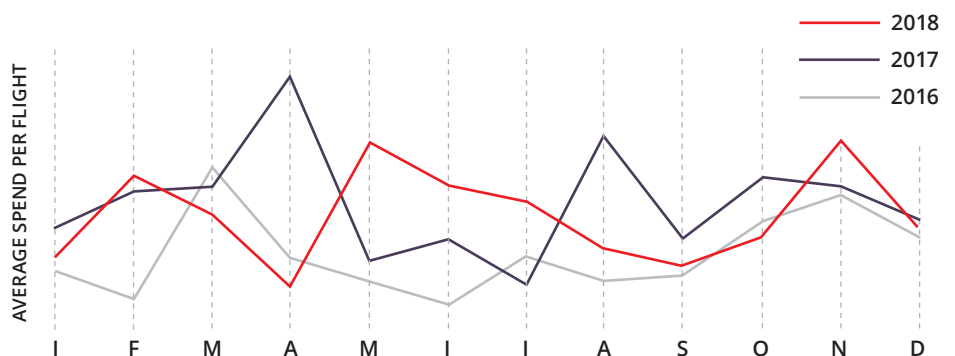
YOY evolution of the average spend
(for all types of aircraft)

+3%



Average spend evolution

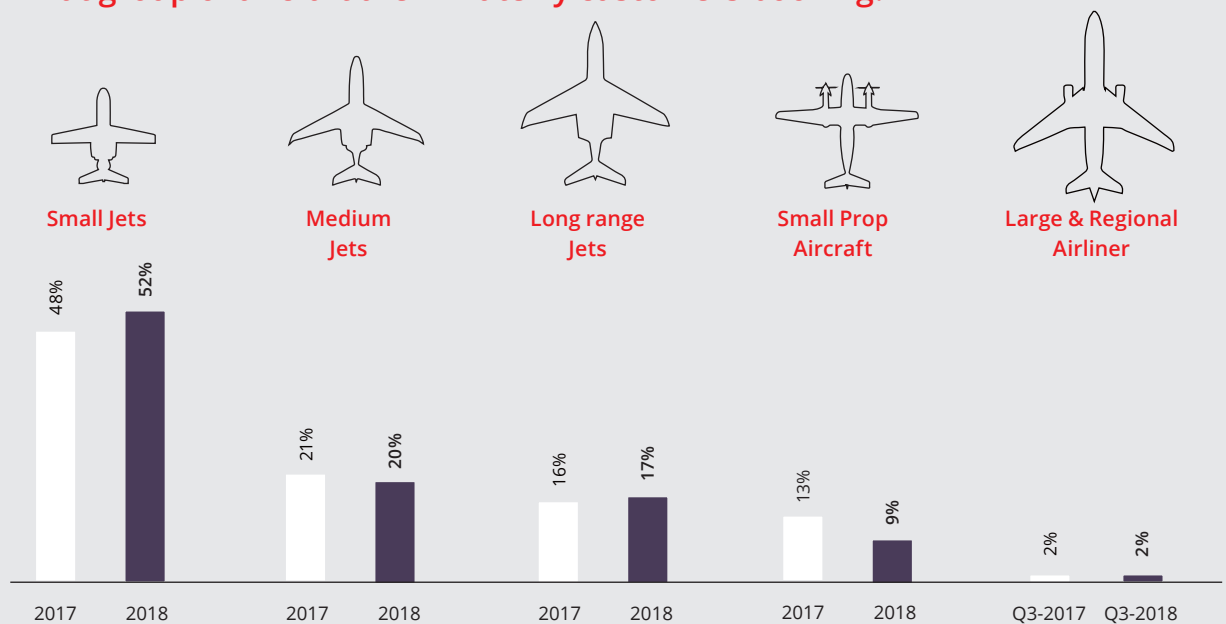
Clients' spend per flight this year has been just slightly over 2017 levels - as an average across all aircraft types. Average spend per flight is dependent on a number of variables, including aircraft choices, mix of routes, and charter rates.



How are private jet customers flying?

Aircraft groups

What group of aircraft are PrivateFly customers booking?



The most popular charter aircraft types



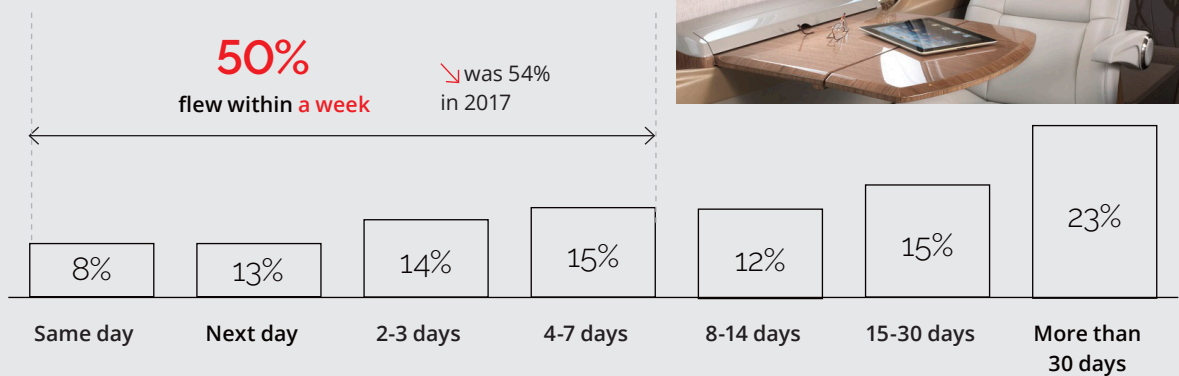
1. Cessna Citation Mustang
2. Cessna Citation CJ2/CJ2+
3. Cessna Citation XLS/XLS+
4. Embraer Phenom 100
5. Cessna Citation Bravo
6. Cessna Citation CJ3
7. Beech Super King Air
8. Hawker 800/800XP
9. Cessna Citation Ultra
10. Gulfstream GIV

With the majority of activity in the on-demand charter market for short flights, Cessna's dominance in the light jet segment is reflected here.

Elsewhere, we've seen the Hawker 800 continue to grow in demand this year and while Gulfstream's G650ER may grab the long range headlines, it's the GIV that's grabbing the volume - providing a more cost-effective step for customers into this segment.

How long does it take to book a flight?

Time between booking and take-off



The proportion of our clients looking to book & fly within a week fell slightly to 50% (from 54% in 2017) and we also saw an increase in clients booking more than 30 days before take-off. With availability of aircraft a challenge at peak times, an increasing number of frequent flyer clients understand the need to sometimes secure preferred options further ahead.

Driveway to runway

Fastest time from enquiry to take-off in 2018



40 mins 15 secs



When clients want to fly fast, our combination of tech and team means we can often have them airborne within the hour, providing they are already close to the airport! Our record this year was just over 40 minutes.

Shortest, longest and average flight time

Flight	From	To	Duration
Shortest flight	Geneva	Grenoble	0 hrs 22 mins
Longest flight	Milan	Male	9 hrs 40 mins
Average flight time	(all routes for 2018)		2 hrs 54 mins

When do private jet customers fly?

26 May 2018 - busiest day

Day with biggest no. of flights flown

This Saturday saw the combination of the Champions League Final, Cannes Film Festival and public holidays in the UK & the US create our biggest day for flights.

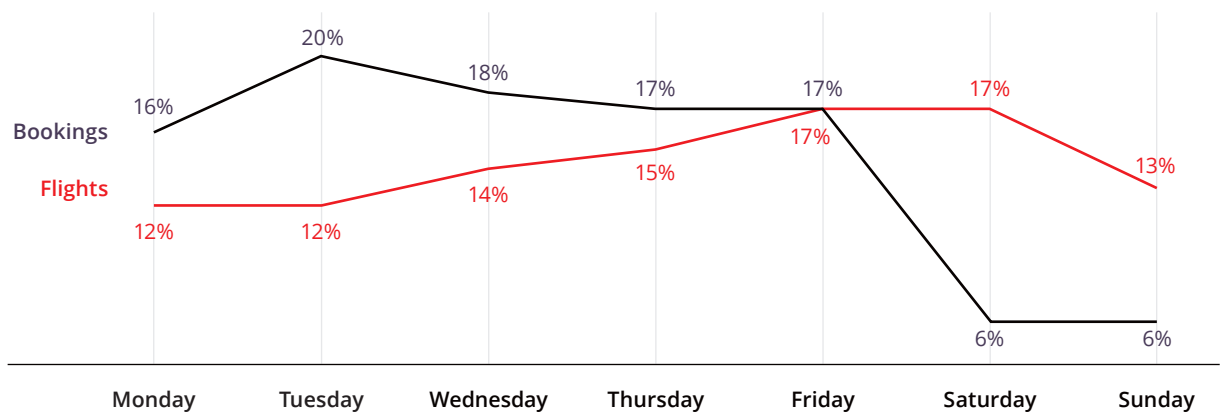
Friday 11am - average peak time

Day and time with most flights flown

Once again Friday at 11am was our most popular take-off slot across the year. Saturdays & Sundays were also busy, demonstrating increased leisure flights.

Days of the week

Which day do our customers book and fly?



Time of the day (local time)

What time do our customers fly?



Who flies by private jet?

The passengers

Who did we fly in 2018?



72% of private jet passengers were male

This was also 72% in 2017



Average of **4.5** passengers per flight

↗ It was 4.4 in 2017



The average age of private jet passengers was **40 years old**

It was also 40 years old in 2017



14% of passengers were children (under 16)

This was also 14% in 2017

The extra mile

In December, we were excited to introduce our first ever fixed pricing route offer: €6000 for charter of a Nextant 400XTi between London and Geneva, regardless of date or time.

This was an on-demand industry first, and something that is already proving popular at this early stage.

Watch this space in 2019 for more PrivateFly fixed price exclusives, bringing extra value to clients on popular global routes.



Device used

How are customers searching for flights?



51%
mobile

↗ 39% used mobile in 2017



42%
desktop

↘ 52% used desktop in 2017



7%
tablet

↘ 9% used tablets in 2017

Pets on jets



3% of flights had pets on board





PRIVATEFLY

About PrivateFly

PrivateFly is a leading booking platform for on-demand private jet charter and part of Directional Aviation's OneSky group of companies.

With over 7000 aircraft integrated worldwide, PrivateFly combines innovative technology with a team of aviation experts, available 24/7 - making it faster and easier to arrange a private jet, wherever and whenever you want to fly.

PrivateFly holds Argus Certified Broker and Wyvern Broker best practice accreditations and is a preferred partner of Virtuoso, the world's leading luxury travel network.

Established in 2008 and with its UK head office in St Albans and a US office in South Florida, the company's fast growth has been recognised by a number of award programs including the Financial Times FT1000, The Sunday Times Tech Track 100 and SME Export Track 100.

privatefly.com
enquiries@privatefly.com
+44 (0)20 7100 6960 (24hrs)

Source: PrivateFly booking, enquiry and flight search data, Dec 2017-Nov 2018
For more information or for a personalised private jet charter quote, visit PrivateFly.com