



#ExpandingHorizons



HOW MILLENNIALS SEE THE FUTURE OF BUSINESS AVIATION

A Focus on Sustainable Personal Air Transport



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In cooperation with
ThinkYoung
What millennials think

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ThinkYoung
What millennials think



“ I would be thrilled to pursue a career in Business Aviation. We have the opportunity to be a part of the next age of aviation.

Student, Switzerland (ZHAW, Winterthur)

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ABOUT THIS REPORT

Innovative technologies like hybrid engines, smart materials and other megatrends are changing mobility. Social attitudes are also shifting when it comes to sustainability requirements, sharing opportunities and automated transportation. Business Aviation is part of this technological development, constantly adapting to society's needs with pioneering solutions. In this report we look at the main views of Millennials on the future of Business Aviation. We listen to their opinions on the new ecosystem of mobility and the future of sustainable personal air transport. And we share insights from thought leaders in the Business Aviation industry, regulators and related industries who shape mobility trends of today and tomorrow. EBAA would like to extend its gratitude to all contributors of this survey including the BBGA (British and General Aviation Association), EBAA France, SBAA (Swiss Business Aviation Association), and GBAA (German Business Aviation Association).



A PIONEERING INDUSTRY MEETS A DIGITAL GENERATION

Welcome to EBAA's survey in cooperation with ThinkYoung on how Millennials see the future of sustainable personal air transport and megatrends in the pioneering Business Aviation industry.

What do young people think of travel, flying, Business Aviation, and future transport? Our survey sought answers to all these questions. The results shed light on the next generation's views on sustainable personal air transport. The survey also provides a unique platform for the Business Aviation sector to connect with young people in an ever-changing environment.

This is the first report of its kind for EBAA. We are proud of our collaboration with ThinkYoung, the first think tank to focus on youth, in this survey of over 2,000 young people in Germany, France, the United Kingdom and Switzerland. We

also conducted four focus groups to explore in greater depth the views of Millennials.

BUSINESS AVIATION AND SUSTAINABLE PERSONAL AIR TRANSPORT

Business Aviation is a significant player in the European economy. Over 374,000 European jobs are either directly or indirectly linked to the European Business Aviation industry, putting us at the forefront of an evolving mobility sector.

Integrating the perspectives of today's youths into our industry is paramount for the sector to master

the transition into the next age of aviation. This report shows how this can be done and is just a starting point for many more encounters to follow. The Next Generation has a good understanding of Business Aviation in general, but don't necessarily appreciate all that it encompasses: only a few realise that helicopters, medical flights and disaster relief flights all fall within the Business Aviation sector.

We are committed to listening and engaging with Millennials to expand our horizons together!

Spotting the trends of tomorrow has always been part of the identity

of Business Aviation and we believe that sustainable personal air transport is a key trend which reflects the principles of our industry: a non-scheduled, point-to-point form of flying, tailored to the needs of individuals.

MILLENNIALS BELIEVE IN IT

One of the most important findings is that sustainable personal air transport will be a game changer. Our survey shows that young people believe that sustainable personal air transport will drastically change society as we know it.

Millennials have an inherent commitment to our planet, technological advancement and equal opportunities. Young people also have a vision of mobility and Business Aviation is part of it. They see future mobility as an efficient, environmentally-friendly whole. They have a range of vehicles at their disposal, more than any previous generation, and Business Aviation is one of them. For Millennials, the main benefit of Business Aviation is that it offers freedom and

The history of flight is about inspiration, perseverance and mastering the elements. The chronicle of Business Aviation begins in the 1920s and is one of passion and commitment to harness the power of this new technology. Its long and rich history has always been about #ExpandingHorizons.

Today, Millennials see the value of Business Aviation as part of a range of modern, environmental, mobility options. They also recognise its

“ Our survey shows that 59% of Millennials believe that new forms of air transport will drastically change our lives.

potential for driving technological change in the entire aviation sector. They can see its increasing accessibility and democratization. And they can see its appeal as a career choice for young talent interested in technology, digitalisation and innovation.

For them Business Aviation is:

- **Pioneering:** transforming flight with innovative and sustainable technologies.
- **Accessible:** open, modern and engaging.
- **Desirable:** taking people where they want, when they want.
- **Indispensable:** connecting regions and people, providing jobs, and offering vital services.

We hope this report serves as a platform for Millennials and the Business Aviation industry to engage directly to form stronger relationships across Europe and the globe. And we hope that you enjoy reading our report as much as we enjoyed researching and writing it.

For more information, please visit <https://expandinghorizons.com/>

Juergen Wiese
EBAA Chairman

WHY THIS SURVEY?

This the first ever survey to collect data on how Millennials see the future of sustainable personal air transport and trends for Business Aviation. It provides insight into the needs, hopes and dreams of Millennials on future mobility trends.

The goal is to match Millennial aims and ambitions with the pioneering drive of the Business Aviation industry to:

LISTEN

to the views of Millennials on innovative and exciting trends for sustainable personal air transport.

INFORM

industry, policy makers, research institutions and entrepreneurs about the views of Millennials on the future of sustainable personal air transport.

ENGAGE

with Millennials to start a dialogue and help the Business Aviation industry stay ahead of the game as it connects with young leaders.

COMMIT

to Millennials by providing pioneering and innovative career opportunities in the Business Aviation industry.

7 TOP FINDINGS

WHAT MILLENNIALS SAY ABOUT BUSINESS AVIATION & SUSTAINABLE PERSONAL AIR TRANSPORT

The survey at a glance: Our survey shows that megatrends drastically shape the future of mobility and that Millennials value the environment much more than previous generations. This has a direct effect on their views of Business Aviation and the future of sustainable personal air transport. Here are some of the highlights of what Millennials think:

CLIMATE CHANGE, DIGITISATION AND AI ARE THE DRIVERS



40% believe that **CLIMATE CHANGE** is the megatrend that will have the **BIGGEST IMPACT** on the development of **SUSTAINABLE PERSONAL AIR TRANSPORT** (digitisation and AI are next)

IT'S ABOUT FREEDOM



62% believe that the main benefit of **BUSINESS AVIATION** is its **ABILITY TO TAKE PEOPLE**

- ↳ where they need
- ↳ when they need
- ↳ on demand

01

IT WILL BE A GAME CHANGER



59% of Millennials believe that **NEW FORMS OF AIR TRANSPORT** will drastically **CHANGE OUR LIVES**

02

03

TRUST & SAFETY ARE THE MAIN BARRIERS



Potentially game-changing technologies like automation need to earn **TRUST** and address **SAFETY** (19%)

04

BEYOND LIMITS

05

THEY WANT TO USE PILOTED RIDE-SHARING FLIGHTS



62% of **MEN** and **58%** of **WOMEN** are willing to use a piloted **RIDE-SHARING FLIGHT**

06

JOBS OF THE FUTURE



Millennials expect that the largest job growth within Business Aviation will be in **RESEARCH & INNOVATION AND ENGINEERING**

07

THE NEXT GENERATION WANTS TO LEARN MORE



More than **50%** of Millennials surveyed are keen to **LEARN MORE** about Business Aviation

WHY DOES THIS ALL MATTER?

Because every form of mobility is transforming itself with new technologies and under the influence of global megatrends. Young people have specific values and expectations. If our sector wants to engage with them, we should do this as equal partners who have a shared interest in the next generation of personal air transport.



MEGATRENDS THAT DRIVE THE NEXT GENERATION OF AVIATION

Megatrends are broadly understood as the major global, political, economic and social forces impacting our lives. These megatrends are powerful enough to significantly influence Business Aviation.

In this report, we identified five mobility-related megatrends: accelerating urbanisation, climate change, digitisation, sharing economies and the rapid advancement of artificial intelligence. We looked at their possible impacts on the Business Aviation industry at a time when sustainable personal air transport evolves and becomes reality.

ACCELERATING URBANISATION

Urbanisation refers to the population shift from rural to urban areas, and it has historically been linked to significant economic and social transformations. The United Nations predicts that by 2050, two-thirds of the world's population will live in cities and just one-third will be based in rural areas. By 2030, the number of mega cities with more than 10 million inhabitants will have grown from 28 to 41. For the fastest growing



cities, urbanisation means that the core expands to take over the suburbs, resulting in new city limits. This has massive impact on the future of mobility, working life and societies. It also has an impact on Business Aviation: new forms of sustainable personal air transport can contribute to increasing mobility needs in mega cities and can help to ensure connectivity between urban and more remote areas.

CLIMATE CHANGE

Climate change, also known as global warming, refers to the rising average surface temperatures on Earth. An overwhelming scientific consensus maintains that climate change is due primarily to the human use of fossil fuels. As of 1 January 2018, 194 states and the European Union had signed the Paris Agreement with the United Nations Framework Convention on Climate Change with

“ We could see widespread autonomous driving in 10 years, so autonomous flying in 15 years is feasible.

Student,
Germany (LMU, Munich)

the purpose to acknowledge the implications of climate change and to ensure that the global average temperature would be held well below 2°C above pre-industrial levels. The Business Aviation sector already committed in November 2009 to address climate change in all aspects of its work, mainly through reducing its CO2 emissions and carbon offsetting, as well as through operations like flight optimization and ground handling. Pioneering sustainable technology is also allowing the Business Aviation sector to embrace the next generation of aviation through electrification and alternative fuel sources.

DIGITISATION

Digitisation is the process of turning information into digital form. Digital technology is disrupting all areas of business, and is driven by the convergence of social, mobile, cloud, big data and a growing demand for rapid access to information. The evolution of digitisation also offers enormous opportunities for stakeholders in the Business Aviation sector to enter new markets, transform existing products, be more efficient and introduce new delivery models. Digitisation is already transforming our industry and the impact on accessibility, instant availability and flight performance will only continue to grow.



SHARING ECONOMIES

Sharing economies are systems in which assets or services are shared between private individuals, either free or for a fee, typically over the internet. Over the past decade, the concept of a sharing economy has grown in popularity, especially among young people, and is emerging as a global megatrend that is affecting a variety of businesses. Ride-sharing is already being promoted for charter flights, particularly for the younger generation. There are currently a number of Business Aviation options for on-demand chartering, including Blade, Jetsmarter, PrivateFly, Victor and Wingly.

ARTIFICIAL INTELLIGENCE

Artificial intelligence (AI) is linked with the digitisation megatrend, which is accelerating the advancement of the technology. AI is essentially machine learning: as technology advances, so does the ease with which computer systems can perform tasks and make decisions that would normally require human intelligence. AI is slowly integrating

into mechanisms of everyday life through machine learning algorithms that allow computers to see, read, listen, speak and gauge our emotions. The aviation industry began looking at uses of AI for safety purposes at the turn of the millennium. In addition to pilot support and integration within aircraft, AI is also being used to improve the passenger experience. AI is ultimately challenging the status quo of our societies and questions about adequate regulation for automated transport and future jobs immediately come to mind.



By Pete Harrison
Programme Director, Transport
European Climate Foundation

TOWARDS SUSTAINABLE PERSONAL AIR TRANSPORT

Climate change is among the greatest challenges for this generation. However, recognising this risk is only the first step towards tackling it. The second step is to start treating climate change like the unavoidable megatrend that it is.



It is common these days for business leaders to think daily about the implications of other megatrends. No business leader can ignore the shift in economic power towards emerging markets. Digitisation promises to lift billions of people into the modern era, but also threatens to eliminate those companies that fail to keep pace. Demographics tells us that in most developed countries the population is aging. And fourthly, the global trading system is evolving into a sprawling, interconnected web - globalisation.

No business leader can afford to ignore these four megatrends, but how often do they consider climate change in the same light? It deserves to be. Many cities are exposed to the massive costs of adapting to sea-level rise. The nutrition of billions of people will be put at risk by ocean acidification. Today's migration challenges will look insignificant when compared to the exodus that might be triggered by desertification. And yet too many business leaders postpone the choices posed by climate change. Can they afford to?

As you will read in this report, 40% of the millennials surveyed rank climate change as the megatrend with the biggest impact on the future of air transport. If businesses start working with the fundamental assumption that carbon emissions will need to reach net-zero by 2050, they will start observing a myriad of implications for how they make investment decisions today. I will highlight just two.

The first implication is how we think about disruptive innovation, especially where it can be harnessed to meet societal goals such as mitigating climate change. This means business leaders need to start thinking more about the services that their customers will need in a future low-carbon economy and less about continuing the status quo. Should we be investing in transporting people, or connecting people?

The second implication I will highlight is the need to fully consider investment cycles towards meeting the net-zero goal in 2050. In few other sectors is this challenge greater than in aviation. The really big improvements will need to come from engines, airframes and fuels. New engines and airframes take time to develop, at least 10 years from drawing board to commercialisation. That gives around 2 product cycles between here and the mid-century goal of a net-zero-carbon economy. With aviation, as compared to many other sectors, we also need to factor in a lengthy process of safety certification. The Business Aviation sector has a key role to play in deploying new technologies and leading this change.

The 30-year challenge of creating a zero-carbon economy might appear daunting, but it is less so when compared to the amazing things that the aviation industry has achieved over the last 30 years. The world's airlines have more than tripled the number of passengers they carry each year to around 3.7 billion. The sector has also quadrupled freight movements. Clearly, this industry has many talented people, and it is capable of incredible achievements. I look forward to seeing those talented people getting to work on the next great challenge of our generation.

For more information:
www.europeanclimate.org



HOW DIGITISATION DEMOCRATISES BUSINESS AVIATION

AN ENTREPRENEURIAL PERSPECTIVE



By Paul Malicki, Founder
and CEO of Flapper

It's never been more important for the Business Aviation industry to listen to technology companies. The traditional Business Aviation ownership model has evolved into all-you-can-fly membership plans, private airlines, on-demand real-time charters and crowdsourcing solutions. These new models are aimed at the upper-middle class, not just the 1% of high-net-worth individuals.

A NEW ECOSYSTEM

It's only now that the market has the means to accommodate more disrupting models, such as pay-per-seat short-haul flights or boutique airlines. They won't necessarily push the big guys aside, but they complement the existing ecosystem.

The reasons behind the evolution of Business Aviation are not limited to technology. Consumer preferences have changed too as they shift from owning to renting. Another driving force is the rise of social media: it is easier than ever to reach the masses through unified marketing channels, while intuitive applications and engaging content allow for an unprecedented scale of marketing.

CONNECTIVITY IS KEY

My company, Flapper, is part of the new generation of private aviation marketplaces. We provide on-demand flying services to airports that are inaccessible to commercial aviation. Our launch market, Brazil, has 2,460 airports, only 121 of which have a connection with commercial flights. The country boasts the world's second largest private aviation fleet, but it is underused and in the hands of the wealthy clientele.

Flapper solves some of the typical pain points of airlines, like security checks and cancellations. It also addresses two key challenges of Business Aviation: a costly service and no automation. Neither of those can be solved without technology: a combination of a sharing economy and a robust marketplace, powered by machine learning, makes Business Aviation more efficient and accessible to end users.

URBANISATION DEMANDS NEW MOBILITY SOLUTIONS

It's worth highlighting that America and Europe have both been at the forefront of shared services, while LATAM still operates under the old scheme, despite huge potential behind the sector. Brazil and Mexico are both continental in size and boast huge fleets. The opportunity also comes with the rise of

the VTOL (vertical take-off and landing) sector. More than 30% of São Paulo's infrastructure is covered in roads. The thriving middle class combined with poor urban planning have resulted in excessive traffic congestion. This traffic costs the Brazilian economy at least \$31 billion a year, almost 4x the value of the entire private transportation market. We are currently in the process of signing a partnership for the operation of VTOL passenger drones, to be officially launched in 2022.

OPENING A NEW MARKET

Are we air pioneers? None of the four co-founders of the company had previously chartered a plane. But after taking 117 commercial flights in a single year, I started questioning whether there was an alternative. I couldn't believe there was so little information about the pricing and fleet availability, or that the industry's leading commercial model had not changed over the last 20 years.

With Flapper, we have successfully challenged the status quo by thinking differently about distribution, technology, and branding. We are bringing a new group of users to the market, and in a post-crisis economy, that matters a lot.

For more information:
www.flyflapper.com



THE SURVEY

HOW MILLENNIALS SEE THE FUTURE OF BUSINESS AVIATION

ThinkYoung carried out this survey on behalf of the European Business Aviation Association to gather the views of Millennials, aged between 18-25, regarding the future of sustainable personal air transport.

The survey consisted of 15 questions spread amongst four core areas: Business Aviation, innovative mobility solutions and smart air transport, empowering people through pioneering technology, and building sustainable communities. The questions mainly consisted of close-ended, multiple choice options. The survey was conducted online between the 23rd of February and the 1st of March 2018. In total, 2,000 responses were gathered, split evenly among residents of France, Germany, Switzerland and the United Kingdom.

DEMOGRAPHICS: WHO DID WE SURVEY?

Our survey of Millennials views on Business Aviation covered four key markets

We surveyed Millennials from France, Switzerland, Germany and the United Kingdom, countries that collectively account for 76% of the total gross value added (GVA) to the European Business Aviation industry.

GERMANY:

- based fleet: 726
- total direct and indirect jobs: 35,731
- departures: 98,482

UK:

- based fleet: 498
- total direct and indirect jobs: 24,858
- departures: 98,311

FRANCE:

- based fleet: 439
- total direct and indirect jobs: 12,411
- departures: 127,923

SWITZERLAND:

- based fleet 265
- total direct and indirect jobs: 18,557
- departures: 45,943

QUANTITATIVE SURVEY

The young people who responded to the survey were all aged between 18-25 (21.7 ± 2.2 years) and were evenly divided between men (49%) and women (51%). Most were either employed (34%) or undergraduate students (33%), while the remaining third were spread between graduate students (15%), high school students (6%), unemployed individuals (6%), self-employed (3%) and an undefined other (3%). More than half of the respondents grew up in a town or village with less than 50,000 people (58%), with only 8% having grown up in a large city of over 2 million.

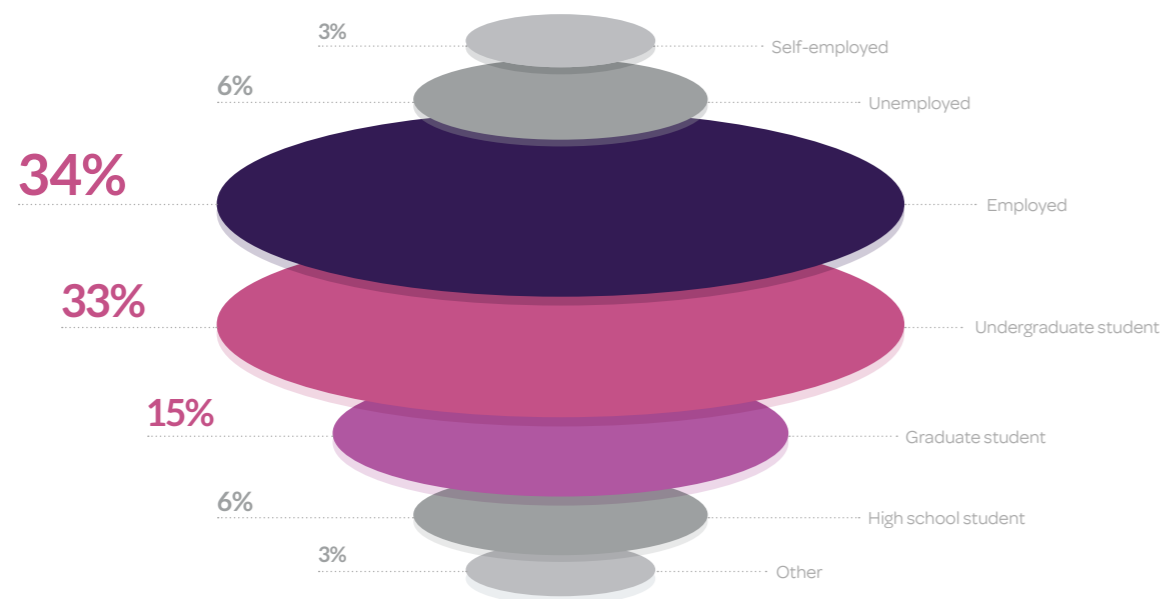
An analysis of the mobility of respondents shows that almost 71% of respondents had taken at least one flight in 2017. However, Millennials did not exhibit excessive travel patterns, with only 13% having taken more than five flights. French residents were found to be the least mobile demographic of the study, with 7% having taken more than five flights, whereas Swiss residents were the most



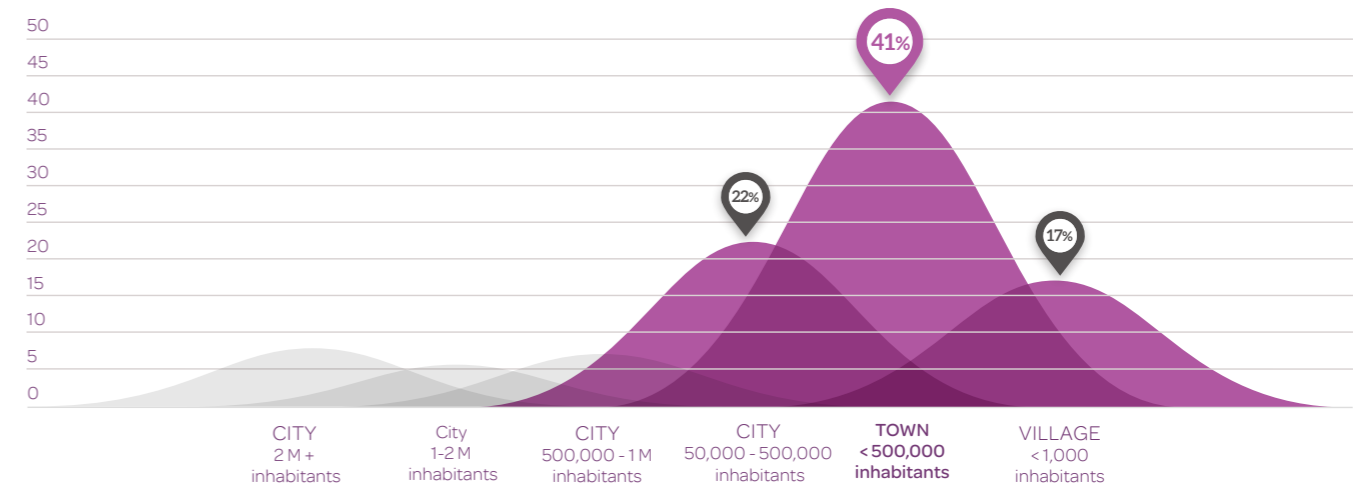
mobile with the respective proportion rising to 18%.

Finally, when comparing the employment status of respondents against mobility rates, unemployed respondents were the least likely demographic to have taken a flight (63%), with graduate students and employed Millennials most likely to have taken more than five flights (17% and 14% respectively).

EMPLOYMENT STATUS



CITY SIZE THAT RESPONDENTS GREW UP IN



FOCUS GROUPS

ThinkYoung subsequently carried out four focus groups to gather more in-depth views of Millennials, regarding the future of sustainable personal air transport. The Millennials that took part were recruited due to their aerospace engineering and STEM backgrounds. The focus groups each lasted up to 90 minutes and focused on four areas: perception of the Business Aviation industry, perception of sustainable personal air transport, future jobs in the industry, and the attractiveness of Business Aviation as a career opportunity. The four focus groups took place in:

- **FRANCE**
Institut supérieur de l'aéronautique et de l'espace, ISAE-SUPAERO, Toulouse
- **SWITZERLAND**
Zurich University of Applied Sciences, ZHAW, Winterthur
- **GERMANY**
Ludwig Maximilian University, Munich
- **UNITED KINGDOM**
Cranfield University, Cranfield

ABOUT MILLENNIALS

Millennials can be known as Generation Y and even Generation Z, but they are not precisely defined. They are usually dated as being born between the late '80s to early 2000s, with our study surveying Generation Z, young people aged between 18 and 25.

How are Millennials different to previous generations? They have some clear character traits, which studies and surveys seem to confirm. However, they are also the subject of some stereotypes that are unfair and unjustified. For example, they are often seen as a high-maintenance generation – even if the evidence often suggests otherwise.

Millennials often have different value systems to older generations: they are more open and inclusive, and whilst the notion of a job-for-life may be over, their career goals prioritize happiness and self-fulfilment over office space and job titles.

Furthermore, Millennials are often associated with several evolving economic and social trends. Whilst they may not be homeowners, Millennials are adaptable to change, with more and more young Europeans taking the decision to study and pursue careers abroad. As a generation, Millennials may be accustomed to more instant gratification than older generations, with social media creating a false sense of connection. However, they are very socially conscious: they seek meaningful tasks, creative outlets and are increasingly critical and aware of the bigger picture of society in which they live in. They want to do more than just gain a salary, they want to make a difference.

Millennials are more educated than ever before, but they could be the rare generation that doesn't benefit from the same levels of prosperity and well-being as their parents.



HOW MILLENNIALS
SEE THE FUTURE OF
BUSINESS AVIATION

SECTION

01

WHAT MILLENNIALS THINK ABOUT BUSINESS AVIATION

WHAT IS BUSINESS AVIATION?

Business Aviation is non-scheduled, professionally operated air transportation. It is tailored to the specific needs of individuals and organisations. Business Aviation is sometimes referred to as private aviation, private jet, or private air taxi. In all cases, it provides customised, efficient, productive and secure travel. It accommodates the schedules of its users, is technology neutral and reaches destinations without the limitations of commercial airlines.

WHAT MILLENNIALS THINK ABOUT BUSINESS AVIATION

Flying is easy to understand. Airplanes, helicopters, even hang gliding and drones. But what is Business Aviation?

It may sound obvious, particularly for those who deal with Business Aviation on a regular basis. Yet it is not always so clear for Millennials, most of whom have no experience with this sort of flying. Our survey asked young people what they understood by the term Business Aviation, and what its advantages might be. The results were revealing, showing a partial understanding of the concept of Business Aviation. They also showed that young people value the time and efficiency of Business Aviation over other factors.

THEY UNDERSTAND THE CORE OF THE BUSINESS AVIATION INDUSTRY

The first part of the survey looked at perceptions of the Business Aviation industry in relation to the services provided and associated benefits. Almost three-quarters of Millennials recognised that it covers business travel on a privately-owned or wholly chartered plane; three-fifths knew that it includes government flights on a government-owned or wholly chartered plane; and more than half correctly acknowledged that personal travel on a privately-owned or wholly chartered plane falls under the umbrella of Business Aviation. This shows that they understand the basics of Business Aviation: unscheduled, non-military flights.

BUSINESS AVIATION IS MUCH MORE THAN THAT

By contrast, Millennials were largely unaware of Business Aviation's role in other areas. Less than a third (32.95%) knew that the industry provides flights for the medical sector. Two-fifths (41.85%) understood business aircraft are used for cargo, postal or spare part shipments, which was just above the figure (38.4%) who knew that the industry includes charter helicopters. And less than one-fifth (18.7%) recognised Business Aviation's pivotal role in disaster relief. Finally, as the era of drone travel emerges, only 12.4% of Millennials classify it as Business Aviation. There were no noticeable differences in responses when broken down by gender or place of residence.



“Sebastian, you know the poverty in the streets of Paris, so how can you rent business jets to rich people?”

HOW BUSINESS AVIATION CAN HELP THE DISADVANTAGED



By Sébastien Dequenne, CEO of Jet Solidaire

Young people joining the jobs market today have different expectations to previous generations.

They are looking for work that make sense for them, and for employers with real values. Big salaries are not enough for Millennials. Values matter. While technology will drive our economies in the future, I believe that solidarity will be equally important.



other things to help former homeless people. It is the first social business agency in Business Aviation in Europe offering private jet charters combined with projects to help poor people. It also recommends the use of cleaner airplanes and the offset of carbon emissions.

I have worked in Business Aviation for ten years and I love it. I have simultaneously been involved in several solidarity projects, many of which help homeless people. Some see these two activities as almost incompatible. They ask me, “Sebastian, you know the poverty in the streets of Paris, so how can you rent business jets to rich people?” This suggests a misunderstanding about our work because Business Aviation is really useful. The time savings are tremendous. In addition, Business Aviation can also be used to help the disadvantaged.

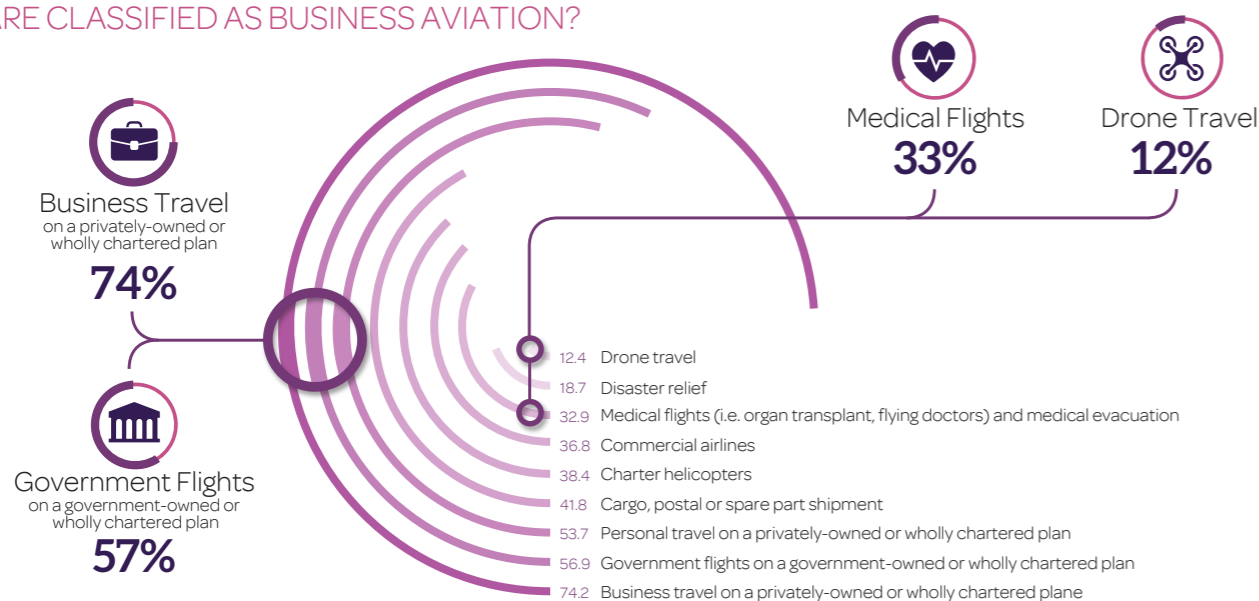
In addition, Jet Solidaire is committed to giving 25% of its profits to charitable works. Our official solidarity partners are Fondation Caritas France, Fondation GoodPlanet, Fondation Les Avions du Bonheur and Aviation Sans Frontières (Aviation Without Borders). We are fully recognised as a social business by MakeSense and ‘Entrepreneurs d’Avenir’. On the environmental front, Jet Solidaire has been awarded ‘Entrepreneurs d’Avenir’ for its commitments.

At Jet Solidaire, it is impossible to charter a business aircraft without speaking about solidarity. It is our mission. We believe that Business Aviation is not only compatible with good causes, but it is a powerful enabler of humanitarian actions.

I created Jet Solidaire (Jet Solidarity) in March 2015 to use Business Aviation in a different way, among

For more information: www.jetsolidaire.com

WHICH OF THE FOLLOWING DO YOU BELIEVE ARE CLASSIFIED AS BUSINESS AVIATION?



While Millennials are able to grasp the main concept of Business Aviation, they overlook much of what the sector does. Most don't see corporate helicopters as a form of Business Aviation. They underestimate the industry's role in providing flights for the medical sector. They tend to ignore how it helps in disaster relief. And they don't consider drones as part of it. This could be a question of mere language and semantics: while Business Aviation is a term that is immediately understood in the industry, it is not necessarily used much in the wider public. Whatever the reason, there is even a lack of understanding amongst STEM students with aviation backgrounds of what Business Aviation is, and the range of services that it offers.



NOT A TOY FOR THE WEALTHY

'Prestige and status' came low down on the list, even though this is often assumed as a hallmark of Business Aviation (or at least private jets). This seems to reflect a general Millennial mentality: they seek experiences rather than possessions – or at least, more so than previous generations. And they are less amazed by the glamour of flying, which would have been a novel and exciting activity in previous generations.

THE OPPORTUNITY TO BUILD BUSINESS WITH A DIGITAL-MINDED GENERATION

Also low down on the list of benefits was 'business value (cost-benefit)' and the 'opportunity to build business'. While these might be important reasons for many current users of Business Aviation, it does not appear to register with Millennials. In times of Skype, Facetime and instant digital connectivity, this viewpoint is unsurprising. The responses varied according to the demographic: high school students were the least likely to rate the 'business value (cost-benefit)' and the 'opportunity to build business' (24% for each) as important, whereas unemployed respondents were the most likely to rate them (41% and 36% respectively).

“Personal air transport will open up many more possibilities in life. It won't just be about the mode of transport, but what we do with the time saved.

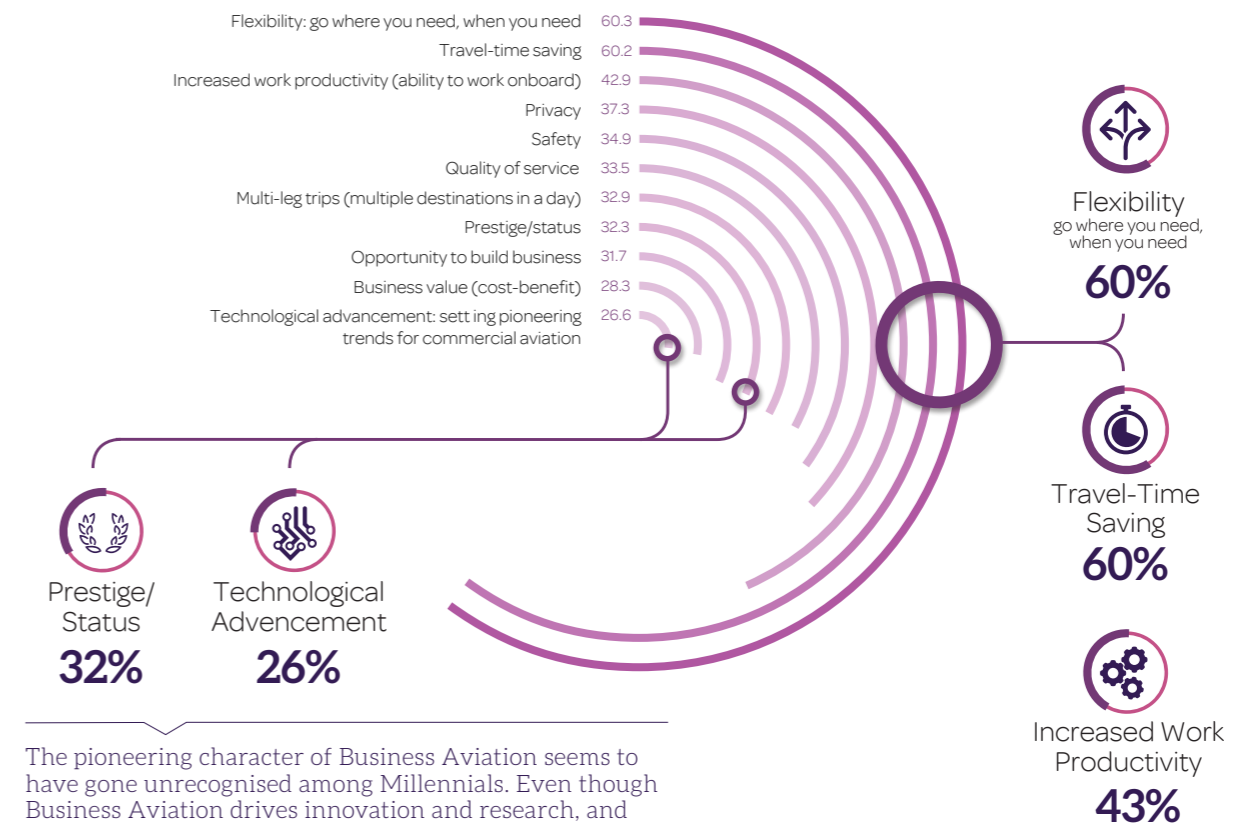
Student, Germany, LMU, Munich

THEY SEE A FAST AND FLEXIBLE SERVICE

When asked about the perceived benefits of Business Aviation, Millennials gave as their top three choices on-demand accessibility, the ability to save time and improved work productivity (table 1.2). When it comes to the perceived benefits of Business Aviation, the survey shows that Millennials value practical qualities. The top two reasons they gave were 'travel time saving', and 'flexibility: go where you need, when you need'. In third place was, 'work productivity'.



WHICH OF THE FOLLOWING FACTORS DO YOU THINK ARE THE MOST IMPORTANT BENEFITS OF BUSINESS AVIATION?



The pioneering character of Business Aviation seems to have gone unrecognised among Millennials. Even though Business Aviation drives innovation and research, and has a strong pioneering character, similar to Formula One in the automotive industry, Millennials seem unaware of it. There are many areas where Business Aviation has led the way in new technologies and techniques. These include use of winglets, new and hybrid materials that can strengthen the aircraft while reducing weight, and avionics. However, Millennials are unaware of these industry-leading innovations.



THE NEXT AVIATION REVOLUTION



By Remo Gerber,
Lilium Chief Commercial Officer

Lilium is ready to change aviation. We will bring high-speed, short-range air travel to Europe and beyond.

Our flights will have zero emissions and, in time, offer a price comparable to today's ground taxis.

There are three key challenges posed by conventional aviation:

- Horizontal flight is cheap, but requires expensive airports and infrastructure
- Helicopters are agile and require no large infrastructure, but are noisy and very expensive to operate
- Environmental concerns (entirely justified) demand a reduction in emissions

The Lilium Jet solves these challenges. It is a five-seater aircraft that will fly up to 300km per hour, using 100% electric power, with a range of up to 300km on a single charge. Lilium's impact over ultra-short distances will be significant – 70km in 15 minutes – with journeys from city centres to out-of-town airports slashed to just a few minutes.

HOW WILL WE DO THIS?

It's fully electric, so it generates zero-emissions when it flies. By embedding 36 jet engines into the wings – and allowing those wing flaps to swivel – we can transition the jet mid-flight. So we can switch from the advantages of a helicopter to all the advantages of a fixed-wing jet



aircraft in just a few seconds. The 36 engines are quiet and highly efficient, hence the extraordinary range as well as the speed.

Lilium combines both the economies of horizontal flight and the agility of a helicopter to land and take off vertically. This is called VTOL – vertical take-off and landing. But with Lilium, you will then fly forwards as if in a conventional aeroplane.

Our prototype has already flown in the skies above Munich, Germany. Take a look at the video on YouTube – you'll see a fixed-wing aircraft that needs no runway and a vertical take-off.

Indeed, it needs little more infrastructure than a helipad: you could

operate it from a building, field, or a carpark. At scale, the Lilium service could cost about the same per passenger as a ground taxi.

Take a look at a map wherever you are right now and draw a 100 km radius. Imagine being able to get anywhere within that radius in around 20 minutes, with virtually no ground infrastructure. This isn't just a transport revolution, it's social change.

Who in Europe can grasp this opportunity and begin planning immediately? Lilium's technology is coming soon. We're ready. Are you?

For more information:
<https://lilium.com>

PERSONAL AIR TRANSPORT WILL DRASTICALLY CHANGE OUR LIVES

It may be some years before we have flying cars and other personal air/aerial vehicles (PAVs) to lift us skywards out of our European cities, but personal air transport is emerging as the next aviation market. What effect will it have on our lives? Some 59% of Millennials say that personal air transport will drastically change society as we know it.

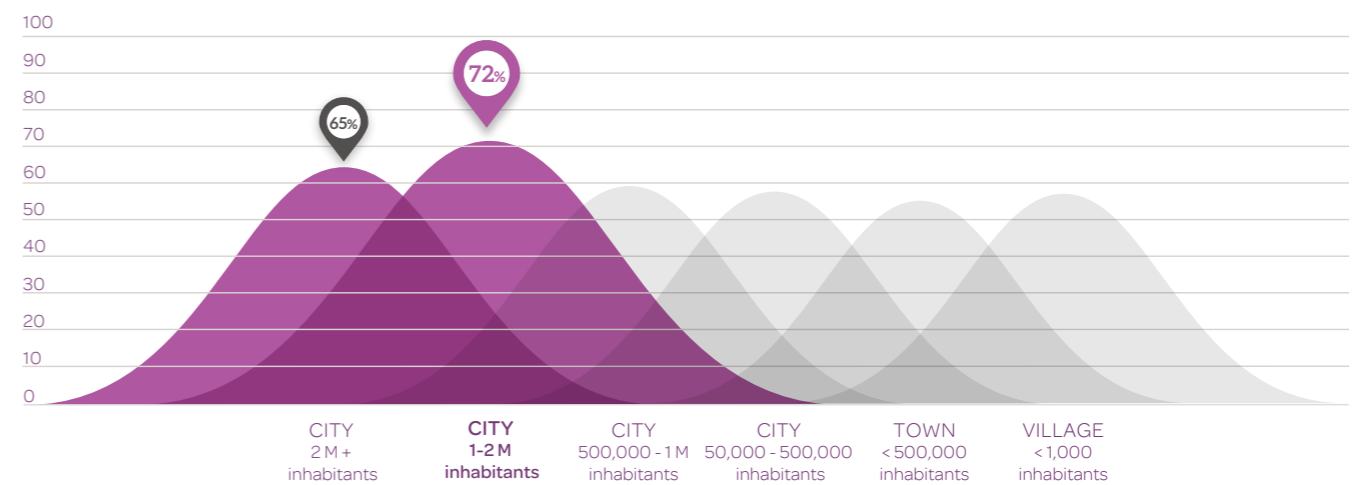
There were interesting variations amongst the different respondents. Those who grew up in larger cities were more confident of a drastic impact: the figure was 72% for Millennials from cities of 1-2 million residents, compared to 55% for Millennials from towns of under 50,000 residents. A full 79% of Millennials who took more than 20 flights in 2017 were confident in a drastic change, compared to only 52% of those that did not take a single flight.

“Would I step into an autonomous plane today? No. Would I step into an autonomous plane in 15 years? Probably yes.”

Student,
Germany, LMU, Munich

DO YOU BELIEVE THE FUTURE OF PERSONAL AIR TRANSPORT WILL DRASTICALLY CHANGE SOCIETY AS WE KNOW IT?

CITY SIZE THAT RESPONDENTS GREW UP IN (in % agreement)



HOW BUSINESS AVIATION HELPS THE ECONOMY

Business Aviation is the part of the aviation sector that is unscheduled and not part of the military. How big is it in Europe? Here are some figures from EBAA's Economic Value and Business Benefits Report published in March 2018:

- Some 374,000 European jobs are either directly or indirectly dependent on the Business Aviation industry, which is more than the total number of jobs in Cyprus.
- The industry has an output of €87 billion and makes €32 billion in gross value added (GVA), which equals the total GVA of Latvia. It spends €25 billion on salaries.
- France, Switzerland, Germany and the UK are the main players in the sector, producing 76% of the total GVA of the industry.
- 192,000 of the sector's jobs stem from the operation of business aircraft, i.e. jobs with aircraft operators, maintenance firms (MROs) and ground handlers/fixed-base operators (FBOs).
- Business Aviation flights save an average of 127 minutes across all European point-to-point flight routes, when compared with the fastest commercial transportation alternative.
- Around one fifth of Business Aviation flights result in more than five hours of time saved than their best commercial alternative due to delays avoided and time saved in airport procedures.



HOW MILLENNIALS
SEE THE FUTURE OF
BUSINESS AVIATION

SECTION

02

INNOVATIVE MOBILITY SOLUTIONS AND SMART AIR TRANSPORT

WHAT IS SUSTAINABLE PERSONAL AIR TRANSPORT?

Sustainable personal air transport is a non-scheduled form of flying, tailored to the specific needs of individuals. Based on the principles of Business Aviation, it is both technology neutral and an open platform for new technologies. The technologies behind sustainable personal air transport support the long-term ecological balance and raise the average quality of life without harming the environment or depleting natural resources.

MEGATRENDS THAT DRIVE SUSTAINABLE PERSONAL AIR TRANSPORT

The big changes that reshape the world we live in are known as megatrends. What are the megatrends that will change travel and transport over the next few years?

We asked Millennials what they rank as the major influences on the development of sustainable personal air transport. We also asked them to rank the key areas the Business Aviation industry should focus on, and to name the fuel source they would like air transport to use. And we asked them to look not just years but decades ahead, to imagine when personal air transport would become available for everyday use.



The results reveal a generation that feels strongly about climate change and digitisation, and that wants businesses to focus on sustainable technologies and renewable fuel sources. Throughout the research, all five megatrends were seen to shape the future that Millennials see for sustainable personal air transport, with climate change emerging as the most influential.

CLIMATE CHANGE AND DIGITISATION WILL SHAPE FUTURE TRANSPORT

Millennials rank climate change as the megatrend with the biggest impact on the future of sustainable personal air transport: 40% of respondents put it at the top. This fits in with other surveys that show how climate change is seen amongst the wider population, a defining threat that needs to be addressed imperatively. Digitisation was the next most important, with 63% ranking it as either the first or second largest

megatrend. This reflects the growth of information technologies, especially smartphones, the internet and social media – websites that can find flights in just a few clicks are already making bookings much, much easier. Artificial intelligence was ranked third: while machine learning is widely recognised as an important technology, there is, perhaps, an uncertainty about how it can affect our lives. Urbanisation came fourth: this might be because it happens over the long term, so people do not easily notice the change; it might also be because the big surges in urbanisation over the past century have occurred in Asia and Africa rather than Europe; and it might be because the respondents did not see how it will affect air transport. The sharing economy was ranked as least likely to impact the development of personal air transport, which could be due to it being a phenomenon that does not seem to translate easily to transport (even if ride-sharing services like Uber are already looking into this area).

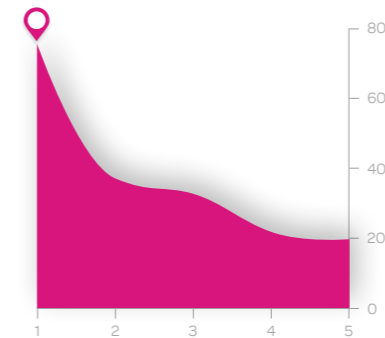
INNOVATIVE MOBILITY SOLUTIONS

REALISTICALLY, WHICH "MEGATREND" DO YOU BELIEVE WILL HAVE THE BIGGEST IMPACT ON THE FUTURE OF SUSTAINABLE PERSONAL AIR TRANSPORT?

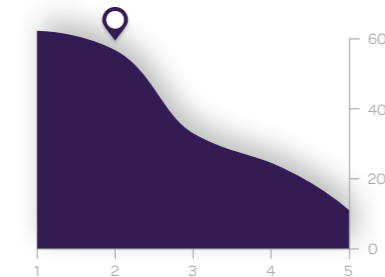
1. CLIMATE CHANGE
2. DIGITISATION
3. ARTIFICIAL INTELLIGENCE
4. URBANISATION
5. THE SHARING ECONOMY



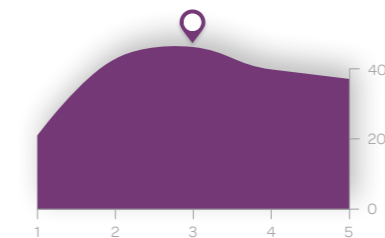
40% of respondents believe it will be CLIMATE CHANGE



30% of respondents believe it will be DIGITISATION



25% of respondents believe it will be ARTIFICIAL INTELLIGENCE



BUSINESS AVIATION SHOULD FOCUS ON SUSTAINABLE TECH

Asked to rank the key area that the Business Aviation sector should focus on for the future, the top choice for Millennials was sustainable technology, an area that covers biofuels, solar energy and electric air travel. This environmental option echoes their prioritisation of climate change as the most important megatrend. Millennials seem to see climate change and technology as linked: industrialisation caused temperatures to rise, but innovation can bring them down again, and it is our responsibility to use our expertise to address the issue.

It was likewise reflected in their second choice: progressive engineering - in other words, production methods and new materials that have a low environmental impact - which is linked to climate change.

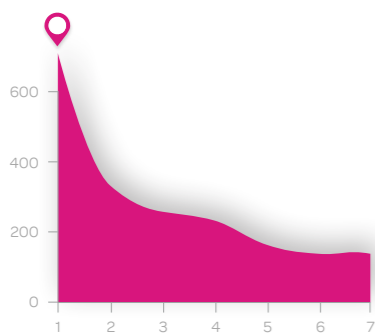


Digitisation, including booking apps and websites, as well as avionics, was their third choice. Accessible technology (e.g. personal air transportation such as flying cars, autonomous flying), supersonic flight, ground-based infrastructure and big data ranked amongst the lowest

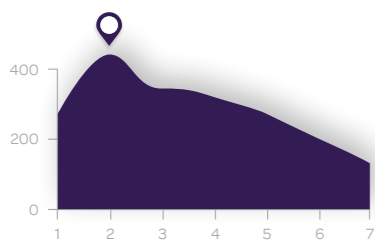
priorities. In addition to the pre-defined key areas, Millennials also mentioned safety, flight prices and the ability to fully fill flights as further areas on which Business Aviation could focus.

INNOVATIVE MOBILITY SOLUTIONS

WHICH OF THE FOLLOWING KEY AREAS DO YOU THINK THE BUSINESS AVIATION INDUSTRY SHOULD FOCUS ON FOR THE FUTURE?



36% of respondents thinks the Business Aviation industry should focus on **SUSTAINABLE TECH**

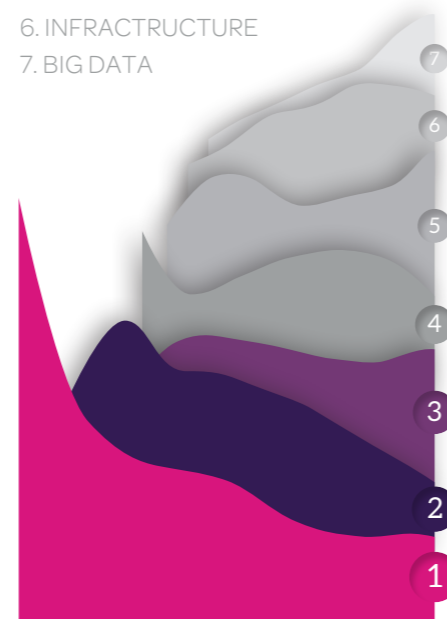


22% of respondents thinks the Business Aviation industry should focus on **ENGINEERING**



13% of respondents thinks the Business Aviation industry should focus on **DIGITALISATION**

1. SUSTAINABLE TECH
2. ENGINEERING
3. DIGITALISATION
4. ACCESSIBLE TECH
5. SUPERSONIC FLIGHT
6. INFRASTRUCTURE
7. BIG DATA



PIONEERS A NEW ERA OF SUPERSONIC FLIGHT



By Brian Barents,
Executive Chairman and CEO,
Aerion Supersonic

With the exception of Concorde, which retired from service in 2003, civil aircraft have been flying at roughly the same subsonic speed since the dawn of the jet transport era 60 years ago.

With new technology, we have an opportunity to introduce more efficient supersonic aircraft that will find wider markets, first for business jets, and ultimately for airliners. At Aerion, we are starting with a business jet, the AS2, because business aircraft users place a high premium on their time. They buy business jets because they don't want to be stuck waiting in airports. If they can save hours on every trip with a supersonic jet, they will embrace the opportunity. We calculated for one company a savings of nearly four work weeks per year with an AS2. That is a major productivity gain.

Aerion, working with NASA, has tested and proven more efficient

aerodynamic designs, especially wing designs. By reducing aerodynamic drag, we are able to reduce fuel consumption and extend range out to 10,000 kilometres—a new level of performance for supersonic aircraft.

New materials such as carbon fibre composites allow us to build structures that were not possible in the past. Modern computing power allows us to run through many more design iterations to find the most efficient shapes, which is exactly what we have done with the sleek AS2.

The AS2 will fly at Mach 1.4, in other words 1.4 times the speed of sound, making it about 60 percent faster than today's fastest commercial jets. In an AS2, it will be reasonable to fly round-trip between New York and London in a day. Supersonic speed opens up new business possibilities.

But the AS2 is only a beginning in a new supersonic era. Initially, we will adapt a popular, current-production subsonic engine to meet our performance requirements. As we demonstrate a robust supersonic

market with this aircraft, we expect to see more R&D dollars (our own and possibly those of competitors) devoted to supersonic technologies, including new engines capable of higher speeds. Over time, we will approach the Concorde's Mach 2 performance, but with a far-quieter, more efficient, and more practical aircraft.

Our plan is to have the AS2 in service by 2025, making faster flight times a reality. To accomplish this, we've teamed with major industrial partners - GE Aviation for the engine and Lockheed Martin for engineering and production. Both have long experience in supersonic designs for the military - experience that will be invaluable in the design of a civil jet.

The most exciting part of this is that we will draw the world closer together, making far-flung locations easier to reach. That, of course, has been the dream of aviation pioneers since the beginning.

For more information:
www.aerionsupersonic.com



OUR COMMITMENTS TO THE ENVIRONMENT



By Bruce Parry,
EBAA Senior Environment Manager

HOW BUSINESS AVIATION IS DEVELOPING A HOLISTIC APPROACH TO SUSTAINABILITY

We take environmental issues very seriously in the industry. Climate change, emissions and sustainable practices are priorities for us. Like other transport modes, we have been examining prospects for alternatives to fossil fuels. Progress may be slow in this area, but it is coming.

The Business Aviation sector committed in November 2009 to address climate change in all aspects of our work. That includes technology operations like infrastructure (air traffic control, ground handling). Of course, it includes reducing the impact of our use of jet fuel. Our commitments are to cut carbon dioxide emissions by 2% by 2020; to have carbon neutral growth by 2020; to reduce our carbon output by 50%.

We recognise that Business Aviation has not been as active as commercial aviation in this area. This is partly down to economics: the price of jet fuel has

dropped sharply, and this has slowed down the process. There are also lots of stakeholders involved, like operators, airports, supplies, and ground handling. But EBAA, together with the General Aviation Manufacturers Association (GAMA), the US-based National Business Aviation Association (NBAA), and Bombardier will be taking steps at the 2018 European Business Aviation Convention & Exhibition (EBACE) in Geneva, Switzerland, to deal with this.

We are preparing a sustainable jet fuel guide for Business Aviation operators. We have introduced new technologies like winglets, the wingtip devices intended to improve flight efficiency, and ever-more sophisticated avionics. We are, of course, a point-to-point transport mode rather than hub-and-spoke. We will be rolling out market-based measures over the next two years like taxes and other financial mechanisms to drive offsets in emissions through the cap and trade system. And the International Civil Aviation Organisation's

(ICAO) Carbon Offsetting and Reduction Scheme for International Aviation (CORSIA) sets the global framework for emissions reductions.

A lot of hope has been placed on solar energy. Airplanes fly above the clouds, so they can be exposed to direct sunlight – at least during the day – and panels can be pasted to the wings. The Solar Impulse aircraft showed how solar power can work, even if it had just one pilot on board. Yet we must be cautious and realistic about solar energy. It may be best suited for secondary systems like in-flight entertainment. Our view is that the next big thing in aviation sustainability will instead be electrification. Overall, the incremental changes in technology, and the new rules and guidelines will all make the sector more environmentally friendly.

For more information:
www.ebaa.org

“Short distances will be electric by 2040/2050.”

Student,
United Kingdom
(Cranfield)

GREENER, SMARTER FUELS

Environmental considerations were also priority considerations for Millennials when it comes to fuels for future personal air transport. Although almost all forms of flying currently run on fossil fuels, Millennials shunned them when asked what fuel source

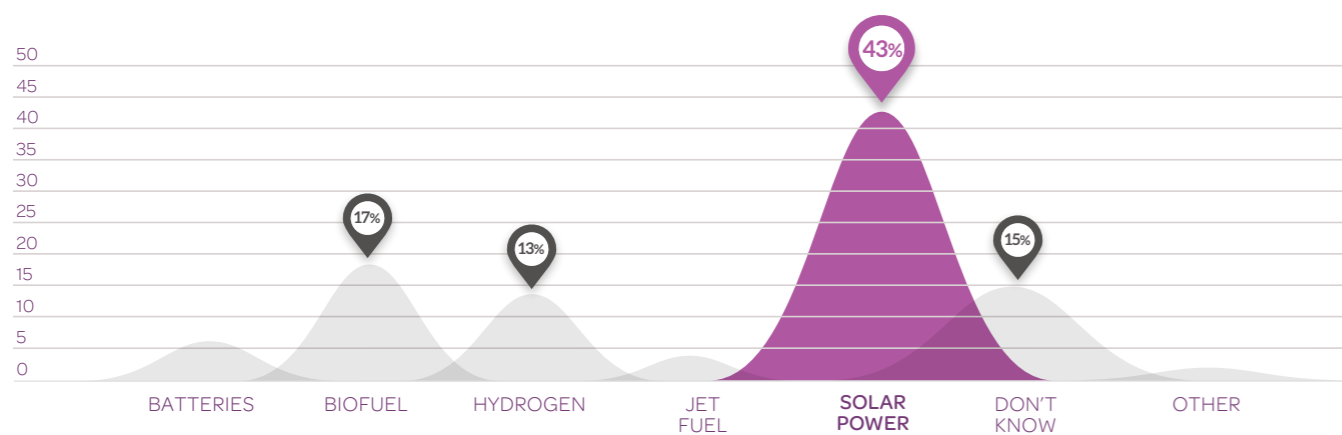
they wanted to see used. The top choice by far was solar power, with 44% saying they would like to use it (see above for the EBAA insight into sustainable flying). Biofuel was the second most popular option, with 17% choosing it, hydrogen came third with 13%, and batteries fourth with 6%. Jet fuel trailed in at 5%.

LONG-TERM VIEW

Asked to predict when personal air transport could become available for everyday use, only 4% of Millennials saw 2020 as a realistic date. The remainder were evenly divided about their mainstream use between 2030,

2040 and 2050, with an average approval of 24% ± 0.5%. When cross-compared with the city size that respondents grew up in, those from the largest cities were more likely to be optimistic, opting for 2030 rather than 2050.

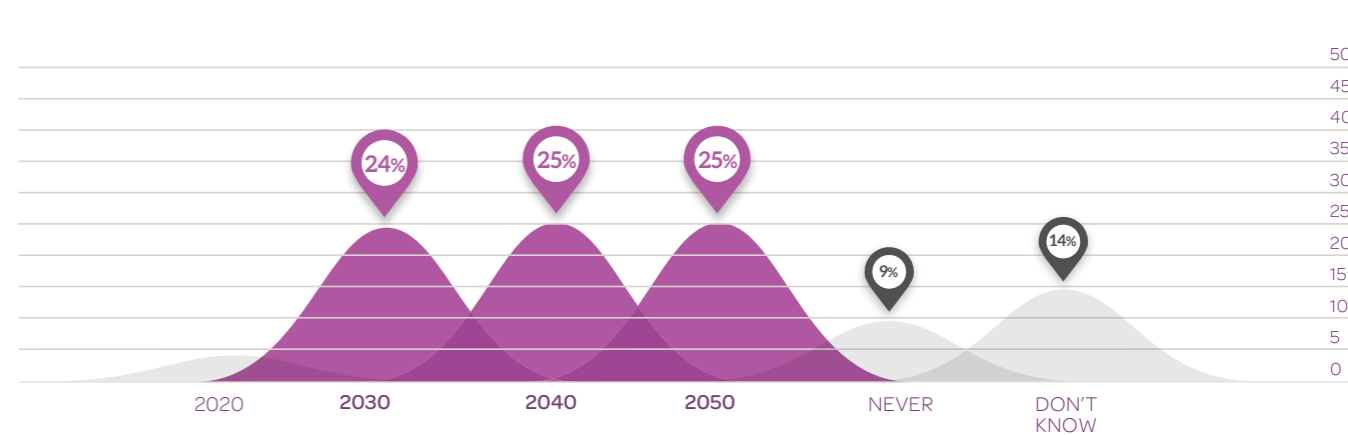
WHAT WOULD YOU LIKE TO SEE AS THE MAIN FUEL SOURCE OF FUTURE PERSONAL AIR TRANSPORT?



The survey answers on mobility issues reflect many of the assumptions about Millennials: they believe in causes, and see climate change as the biggest social, political and economic challenge facing the world today.

Asked about megatrends, climate change stood out as the biggest one of them all. While climate change is widely recognised by all ages as a threat, Millennials tend to rank it far higher as a priority than older generations. Similarly, they want Business Aviation to focus on sustainable technology, reflecting their concern about consumption and our impact on the environment. They believe that digitisation and AI have much to offer on the journey towards a more sustainable aviation sector.

WHEN DO YOU BELIEVE PERSONAL AIR TRANSPORT COULD BECOME AVAILABLE FOR EVERYDAY USE?



The final question, on predicting when personal air transport could become available for everyday use, offered an interesting insight into the understanding Millennials have of the sector: they have low expectations that it will be flying them to work any time soon. And yet, personal air transport is already here. This is one of the most exciting times for Business Aviation as innovators and entrepreneurs make the most of new technologies, materials and more flexible rules to develop personal air transport. Flying cars may not be dotting the roads and skies yet, but prototypes are being developed, and they will be here much, much sooner than Millennials think. If the Business Aviation sector were to do more to showcase these brilliant, emerging projects, it might show young people how it is a sector of cutting-edge design and innovation.



HOW MILLENNIALS
SEE THE FUTURE OF
BUSINESS AVIATION

SECTION

03

EMPOWERING PEOPLE THROUGH PIONEERING TECHNOLOGY

PIONEERING TECHNOLOGIES

Human flight has always been a dream of mankind, and it needed aeons of innovation to make it happen. More than a century on from the first flight, and innovation is still driving the dream, making it safer, more environmentally friendly and affordable. Business Aviation is at the forefront of these advances.

HOW TRANSPORT INNOVATION CAN CHANGE OUR LIVES

The potential impact of sustainable personal air transport

From the earliest times, we have dreamed of going faster, further and higher. It changed our lives whenever we did, but not always in the way we thought. Now that we are on the cusp of new transport revolutions, how do we expect our lives to change?

Younger generations tend to be the most idealistic and hopeful. Less bound by rules and experiences, they can let their imaginations wander as they concoct solutions to intractable problems.

Our survey asked Millennials how they saw future transport. Their answers revealed a generation that takes travel for granted: they see new forms as merely a faster, more flexible iteration of what is already there. They cherish the freedom that sustainable personal air transport could offer, but they are not yet comfortable with automation.

FREEDOM AND FLEXIBILITY

How could sustainable personal air transport empower people? Millennials gave as their top two responses 'freedom of travel' (56%) and 'increased flexibility' (56%). In third place came 'accessibility'. Less than a quarter of respondents (24%) named 'easing urban transport' as a tool of future empowerment. This suggests that Millennials have the same impulse to travel when and where they want like other generations: they seem to see sustainable personal air transport as a more efficient tool for their travel plans.

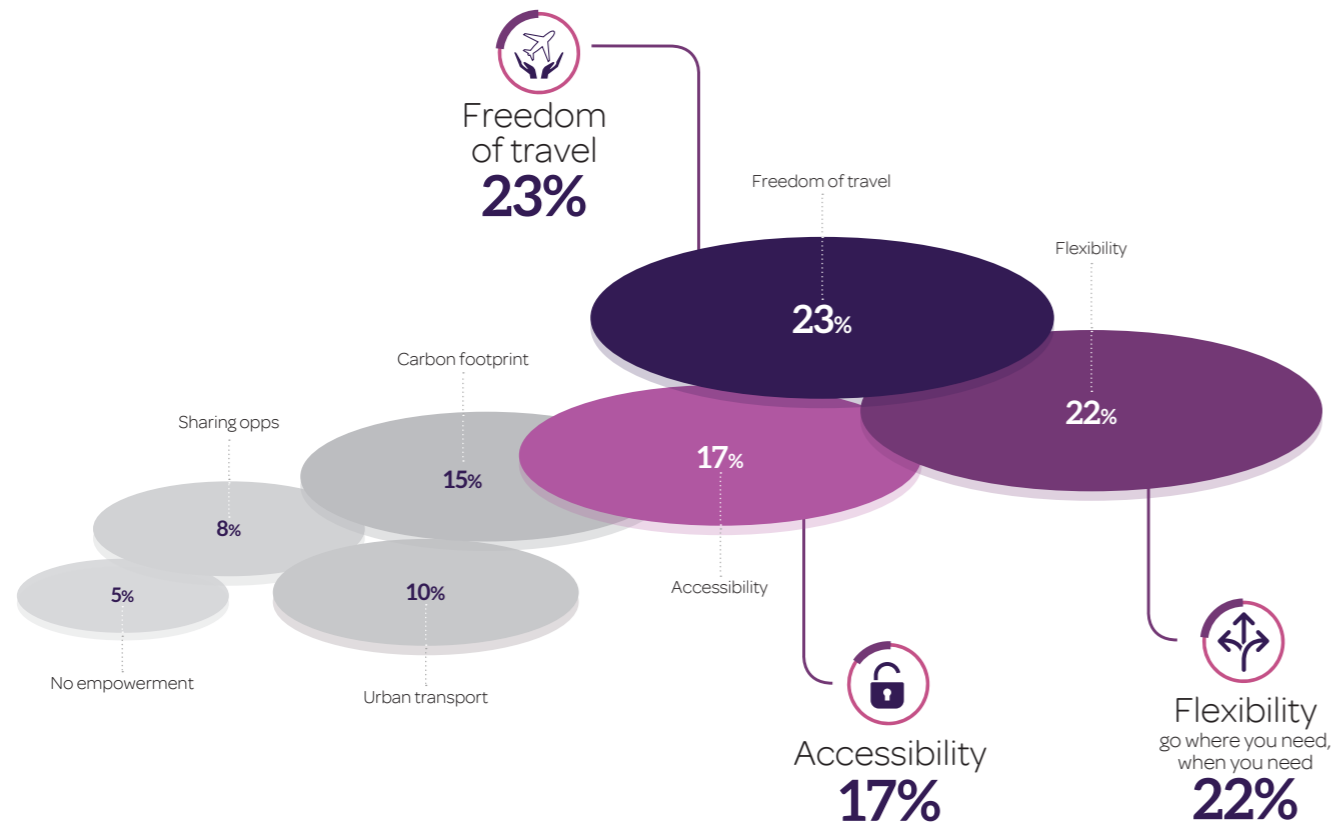
COST AND SAFETY ARE BARRIERS

Asked about the biggest obstacle to personal air transport becoming an everyday option, the top three responses were cost (50%), safety (36%) and carbon footprint implications (35%). Only 16% of Millennials see the slow pace

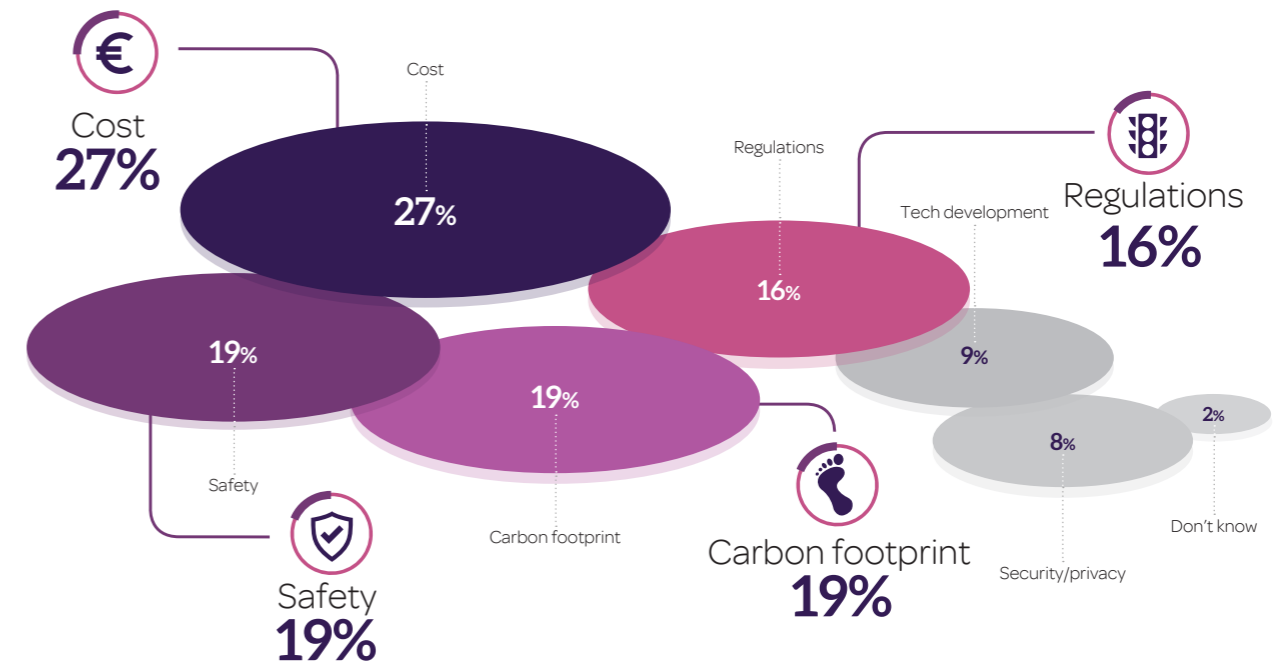
of technological developments as a barrier. Respondents also mentioned inadequate ground-based infrastructure and light pollution from congested skies as further barriers, with both being outside the given list of options.

PIONEERING TECHNOLOGY

IN WHICH WAYS COULD SUSTAINABLE PERSONAL AIR TRANSPORT EMPOWER PEOPLE?



WHAT DO YOU SEE AS THE BIGGEST CHALLENGE FACING PERSONAL AIR TRANSPORT AS AN OPTION FOR EVERYDAY USE ?



There are many arguments for pursuing sustainable personal air transport, including the prospect of a lower carbon footprint, and easing urban congestion. However, for Millennials the promise is something much more individual: freedom and flexibility. This tells us that young people are less concerned about the secondary factors related to their use of sustainable personal air transport (in the case of the carbon footprint, this could be an assumption on their part that such problems would be resolved anyway). The prioritising of freedom and flexibility suggests that Millennials want to act on the same instincts as anyone who has their own vehicle, from a bicycle to a car to a private plane: the freedom to go when and where you want. It is less about the bells and whistles of the vehicle but about its capacity to take you to places.

“In the next 5-10 years, regulation and public perception will not have changed enough to allow for fully-autonomous planes.

Student,
United Kingdom, Cranfield

**PILOTLESS FLYING?
TRUST IS AN ISSUE**

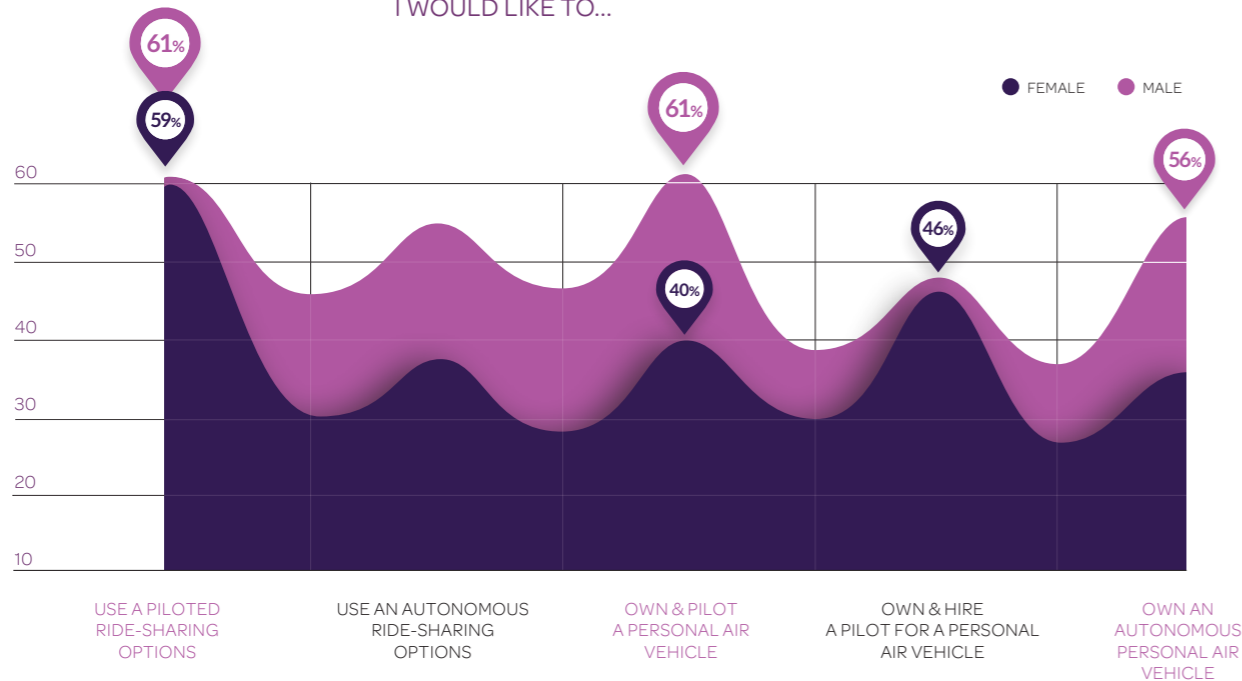
There are different models of personal air transport, from ride-sharing to ownership, but which ones are Millennials ready to use? Ride-sharing air services did well in the survey, with 60% stating they would use it. However, that number dropped to 46% if the ride-sharing service was automated, thus without a pilot. A similar trend emerged when asked about the possibility of owning a personal transport option, with 50% saying they would like to have one and pilot it themselves. Likewise, the figure dropped to 46% when asked if they would like to own

an unpiloted option. Revealingly, those respondents who hadn't taken a flight in 2017 were most likely to strongly disagree with the notion of owning a personal air transport option, regardless of its level of autonomy. There was also an interesting gender differential: men consistently reported higher rates of agreements to the five statements. The largest difference was seen in terms of owning and piloting personal air transport themselves, with 61% of males agreeing and 49% of females agreeing.



**THE FUTURE OF SUSTAINABLE
PERSONAL AIR TRANSPORT**

I WOULD LIKE TO...



There are many arguments for pursuing sustainable personal air transport, including the prospect of a lower carbon footprint, and easing urban congestion. However, for Millennials the promise is something much more individual: freedom and flexibility. This tells us that young people are less concerned about the secondary factors related to their use of sustainable personal air transport (in the case of the carbon footprint, this could be an assumption on their part that such problems would be resolved anyway). The prioritising of freedom and flexibility suggests that Millennials want to act on the same instincts as anyone who has their own vehicle, from a bicycle to a car to a private plane: the freedom to go when and where you want. It is less about the bells and whistles of the vehicle but about its capacity to take you to places.

ABS JETS

By Martin Kulich,
Senior Flight Consultant at ABS Jets

**A PERSPECTIVE ON THE NEXT
GENERATION OF AVIATION**

How can we make our aircraft more environmentally friendly? A good start would be hybrid and battery-powered aircraft, which have a smaller environmental impact than conventional aircraft. The most challenging task for hybrid and battery-powered aircraft is to build a safe and lightweight chemical battery. Even the best-case scenarios suggest that it will take at least a decade, maybe two, before electric powered commercial aircraft are put into service.

However, a hybrid commercial aircraft with an engine powered by battery could be reality in only a few years. The ideal solution for transportation over short distances is, of course, vertical take-off and landing (VTOL) technology with battery power. If they succeed, they might compete with cars - or even better, cars might evolve to include another direction, vertically into the air.

There are already a few small start-ups developing passenger drones with a seating capacity of one to two people. The next stage in this drone development is autonomous control. However, we can already anticipate problems with self-driving cars and their autonomous systems: none of them are 100% reliable or safe.

Another type of personal air vehicle providing door-to-door transportation is the flying car. Some companies have made prototypes, and they may be ready to sell their products within one or two years. However, this technology needs a paved runway or road for take-off and landing: no civil aviation authority currently allows such operation from a public road. For obvious safety reasons, it is not expected to change. Flying cars with VTOL

technology seem a better combination for personalised travel.

ADS-B technology is great step forward in air traffic navigation. ABS Jets recently installed this technology into its Embraer aircraft fleet. It will certainly ease the workload for air traffic controllers, and ADS-B may someday replace most of the surface surveillance radars for routine air traffic control functions. Improvements to systems and technology must continue so autonomous flight in the future will be possible and safe.

The future for personal flight might be in combining car and drone technology. It could be the solution for short journeys (30-60 minutes) and help solve traffic congestion. Another advantage of drones is that they don't need airport structures. The big question, though, remains air safety. It will still be one of the biggest challenges for safe air travel for all users, whether on personal journeys or typical commercial flights, for years to come.

For more information about ABS Jets:
www.absjets.com



HOW MILLENNIALS
SEE THE FUTURE OF
BUSINESS AVIATION

SECTION

04

BUILDING SUSTAINABLE COMMUNITIES

BUSINESS AVIATION AND LOCAL COMMUNITIES

Business Aviation connects people to destinations, including far-flung locations that might not otherwise be served by commercial airlines. In Europe alone, some 250 city or area pairs are served through Business Aviation, which are not connected by non-stop commercial flights - nearly one connection in three is not offered by any direct commercial flight. Business Aviation also accounts for hundreds of thousands of manufacturing and service jobs, providing an economic lifeline for thousands of communities.

HOW BUSINESS AVIATION CAN DRIVE JOBS AND GROWTH

Growing the value and impact of Business Aviation at local level

The final section explored the wider economic impact of Business Aviation. Jobs and growth will follow when a business sets up to make, operate or maintain planes. That can have a huge effect on the local community. Airports are a further indirect economic benefit. Our survey looked at how Millennials see the impact. Our survey also probed the career appeal of Business Aviation, to see if Millennials have particular demands or expectations from potential employers in the sector.

“A question that we have to face is how unspecialised job seekers, those with less education, will fit in to the Business Aviation industry in the future?”

Student, Switzerland, ZHAW, Winterthur

THE JOBS WILL CLINCH IT

Business Aviation can create jobs and investment for areas that build aircraft, and for the airports that serve these flights. Asked how local communities can benefit from Business Aviation, 60% of Millennials recognised the potential for job creation.

The public image of Business Aviation is often dominated by the machines themselves, which can be slick and glamorous. But there is more to the story behind the planes. The employment opportunities in developing, building, and operating the planes is substantial. Not to mention the indirect employment in, say, airports. Millennials recognise that the main benefit for local opportunities are emphatically jobs: they put employment at the top of their list.

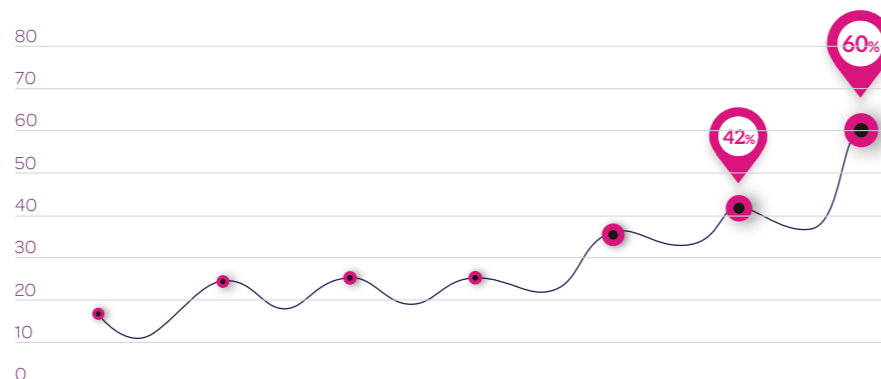
CONNECTIVITY SCORES HIGH TOO

This was way ahead of the second choice: 42% said these airports could improve the connectivity between major urban centres and remote areas, helping link areas that are not well served by commercial airlines, or indeed, any transport modes.

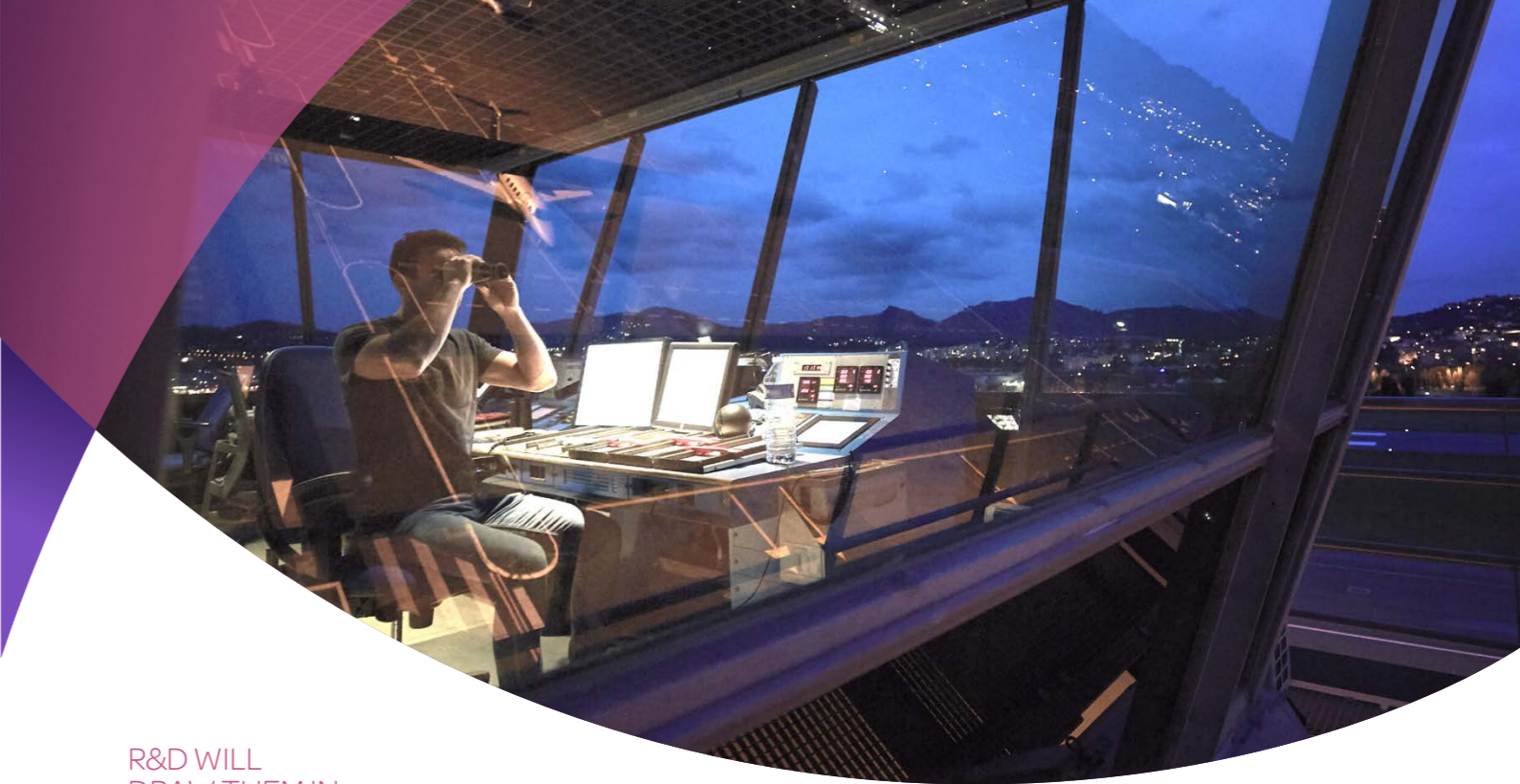
The next benefits listed were skills development (36%) followed by access to airport facilities (26%). In second place for local communities is connecting places across the world. This seems to chime with the other pragmatic choices that Millennials made in other questions: they see Business Aviation in more functional terms, as a tool for jobs and mobility.

SUSTAINABLE COMMUNITIES

HOW CAN LOCAL AIRPORT COMMUNITIES BENEFIT FROM BUSINESS AVIATION?



1. JOB CREATION
2. URBAN-REMOTE CONNECTIVITY
3. SKILLS DEVELOPMENT AND TRAINING FOR YOUNG PEOPLE
4. ACCESS TO AIRPORT FACILITIES FOR LOCAL CITIZENS
5. ACCESS TO PERSONAL AIR TRANSPORT
6. SUSTAINABLE INITIATIVES AND TECH
7. BETTER COMMUNICATION AND INFORMATION TOWARDS THE COMMUNITIES



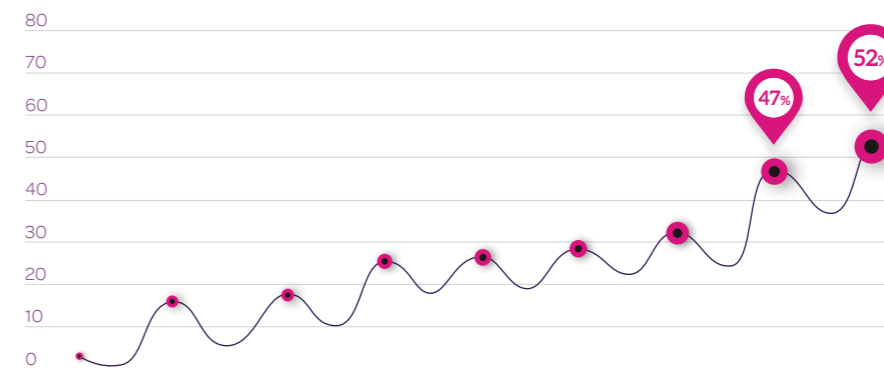
R&D WILL DRAW THEM IN

Where can Business Aviation expect the biggest jobs growth? The three main areas that Millennials listed are 'research and innovation' (52%), 'engineering' (47%) and 'aircraft management' (32%). This is a positive sign as it seems to show that they recognise the innovative and industrial aspects of the sector. Indeed, naming research as the biggest jobs growth area shows that they see that Business Aviation could become one of the more pioneering sectors of the economy.

“You have the possibility to take part in pioneering work such as testing out forward looking infrared (FLIR) cameras, by seeing how humans interact with new systems and discovering their capabilities.”

Student, Switzerland, ZHAW, Winterthur

IN WHICH AREAS WILL BUSINESS AVIATION SEE THE LARGEST JOB CREATION DUE TO TECHNOLOGICAL ADVANCEMENTS?



1. RESEARCH & INNOVATION
2. ENGINEERING
3. AIRCRAFT MANAGEMENT
4. PILOTING
5. GROUND CREW
6. DATA ANALYTICS
7. CUSTOMER RELATIONS MANAGEMENT
8. CONNECTIVITY & INFLIGHT ENTERTAINMENT
9. OTHER

THE JOBS OF THE FUTURE



By Bernhard Fragner,
CEO and Founder of GlobeAir

WHAT BUSINESS AVIATION HAS TO OFFER TO THE NEXT GENERATION

The business behind Business Aviation is mostly in three areas: aircraft operations, the maintenance and the handling sectors. However, alternative job perspectives are now opening up in the industry.

Technological disruptions are forcing Business Aviation companies to innovate. For example, there are more and more job opportunities in IT, software development and digital marketing.

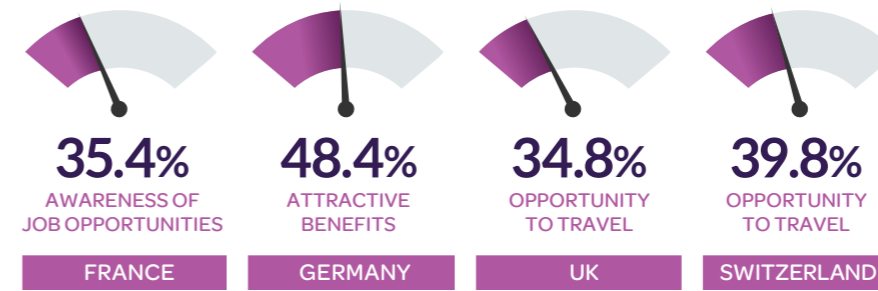
Today, the key for private jet operators to provide seamless experiences for the whole customer journey is through mobile-friendly online processes and multiple points of contacts. The Business Aviation clientele is changing and becoming much younger. It expects Business Aviation companies to be reachable at any point in time, and available on multiple platforms.

One of the perks of Business Aviation is business efficiency. The industry helps employees and employers cut travelling times – and that allows clients to have

same-day multiple trips. The economy benefits from point-to-point connections between locations that commercial airlines cannot connect to, and so generates growth.

All this shows how Business Aviation helps grow the economy. It builds businesses and delivers investment and jobs. And thanks to new technologies, Business Aviation can grow even faster.

For more information:
www.globeair.com



The question about what could make a Business Aviation career attractive revealed that in many ways, Millennials see the sector in the same way that they see other jobs. The top two options listed were classic ones that they might want with most other careers: opportunities for career progression and an attractive benefits package. The third choice, the opportunity to travel, may at first glance seem to reflect the specificities of Business Aviation, but nowadays that is a quality that many other careers might offer. In other words, the Business Aviation sector, like other sectors, must continue to focus on traditional ways to best attract talent: offer good pay, conditions, and career opportunities.

OPEN UP AVIATION

When asked what might attract a more diverse Business Aviation workforce, Millennials ranked promotion of equal opportunities (64%), family-related benefits (58%) and flexible work schedules (52%) as their top three choices. While men and women both give the same top three factors, equal opportunities are more important

for women (71% vs 57%), along with family-related benefits (64% vs 51%). One respondent specifically recommended that the Business Aviation industry should work more on its image: 'it should be more approachable, and less like a niche enterprise'. Finally, most said they would be interested in learning more about Business Aviation, with 60% of men and 50% of women saying yes.

"I barely see job opportunities on job websites. I would consider jobs in the industry, but there's little visibility on the main online channels. There's no clear path to enter.

Student,
United Kingdom,
Cranfield

CAREER, BENEFITS AND TRAVEL

What could make a Business Aviation career attractive? The top three qualities that Millennials list are: opportunities for career progression

(37%), an attractive benefits package (36%) and the opportunity to travel (35%). Men were slightly more likely to prioritise benefits packages (40%), while women prioritised opportunity to travel (39%). Some 35% of French residents said they would

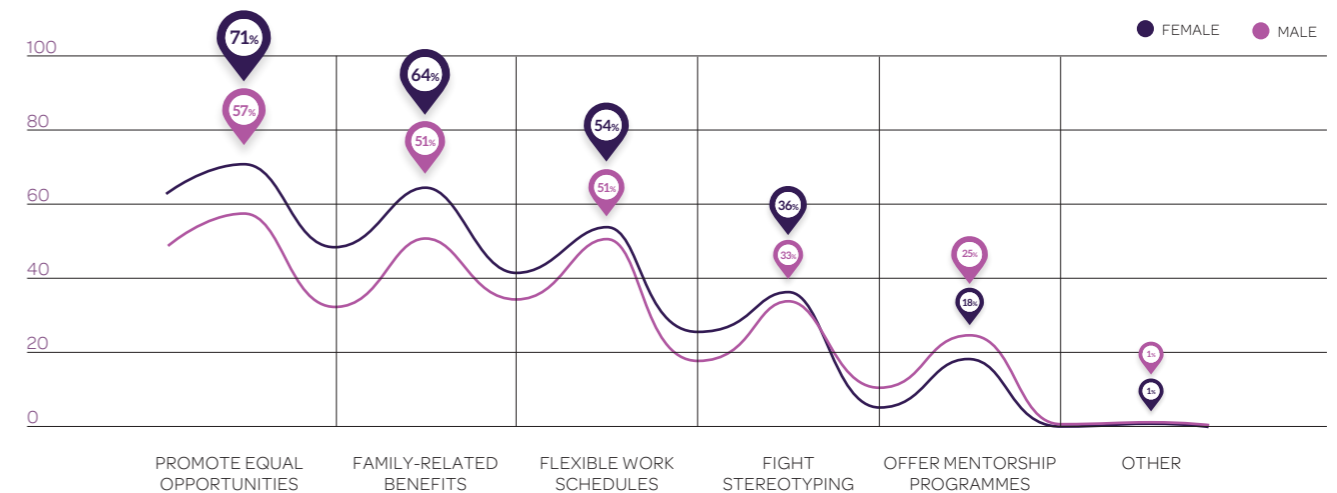
be attracted by job opportunities, compared to only 13% of British residents. Unemployed Millennials are most likely to be attracted by on-the-job training opportunities (27%), while job opportunities appeal to most graduate students (25%).

WHAT WOULD MAKE A CAREER IN BUSINESS AVIATION ATTRACTIVE TO YOU?

	FRANCE	GERMANY	UK	SWITZERLAND
ON-THE-JOB TRAINING	20.6	12.2	25.8	17.0
ATTRACTIVE BENEFITS	31.6	48.4	43.0	22.8
AWARENESS OF JOB OPPORTUNITIES	35.4	15.2	12.6	21.0
CARRER PROGRESSION	33.2	42.4	35.0	36.6
FLEXIBLE WORKING CONDITIONS	27.4	36.4	32.2	35.6
DIVERSITY AND GENDER BALANCE	14.6	15.6	12.4	18.2
CLEAR PURPOSE/RELEVANCE FOR SOCIETY	11.0	13.8	12.0	13.6
SPACE TO INNOVATE	18	18.4	14.2	17.4
OPPORTUNITY TO TRAVEL	34.8	29.6	34.8	39.6
OTHER	0.6	0.2	0.2	0.8
NO INTEREST	12.2	17.2	12.2	13.0

SUSTAINABLE COMMUNITIES

HOW DO YOU THINK BUSINESS AVIATION COULD ATTRACT A MORE DIVERSE WORKFORCE ?



The question about how to attract a more diverse workforce revealed how Millennials have high expectations of their employers, including flexible and tailored conditions. They expect a strong commitment to equal opportunities, family-related benefits and flexible work schedules. In other words, the workplace represents more than a career. It is an environment and an eco-system that has to reflect employer needs and values. This means that if the Business Aviation sector wants to attract young talent, it must shift its image from its current one as a niche brand, and ensure it is seen as an open, modern and accessible sector.

THERE ARE NO LIMITS TO WHAT YOU CAN BECOME

THE REMARKABLE STORY OF THE FIRST SWISS WOMAN TO CREATE HER OWN BUSINESS AIRCRAFT FLEET

I remember the moment I decided to become a pilot. It was in 1980, and I was taking a flight over the Grand Canyon. As the plane swooped through the monumental valleys and glided, bird-like, past the orange rocks, I made up my mind. After that, I began taking flying lessons. By 1987, I had my pilot's license. It looked like my dream would be fulfilled.



THE HARD REALITY

Then reality struck. Despite my qualifications, no-one in my native Switzerland was ready to offer me a position. Pilot jobs were just rarely available to women. It looked grim.

But I refused to stay grounded. I figured that if no-one would let me fly their planes, I would fly my own. So I set up my own airline, CAT Aviation. It is still going strong today.

I started with a Cessna C421, and flew it from Detroit to Zurich. Many rivals and male pilots would laugh at me, but they just made me more determined. Three years later I bought my first jet, a Cessna Citation C550. Six years after that, I bought my first medium-distance plane, a Hawker-Siddeley HS125-800A.



By Helene Niedhart,
CEO CAT Aviation

CAT AVIATION TODAY

Today, CAT Aviation employs 70 people, runs seven business jets and has an annual turnover of \$57 million. It is still based in Zurich and specializes in charter flights. I am still the CEO, president and majority shareholder. And I am still the only woman owner of an airline in Switzerland.

Switzerland in the 1980s was obviously not open to aspiring women pilots. But I'm happy to say that things have changed: there are more and more women in aviation. Women are finally accepted. I am now vice-president of the Swiss Business Aviation Association and I am on the EBAA Board. Over the years, I have flown more than 11,000 hours – and I continue to do so. I have the best job in the world.

For more information:
www.cat-aviation.com



BUILDING A DIVERSE AND ACCESSIBLE INDUSTRY



STRATAJET

By Cecilie Oyas, Head of Supply
and Charter, Stratajet

WHY EQUAL OPPORTUNITIES AND ACCESS MATTER

Private aviation has developed a reputation over the years of being inaccessible, not just to its potential customers but also for those looking to break into the industry. Yet technology is paving the way for the industry to be reinvigorated by young talent as it enjoys its first surge since the recession.

Aviation has traditionally been a male-dominated industry. There exists a perception that women simply aren't pilots – or pilots aren't women – and that's something I find very hard to accept given how at home I feel when flying.

Admittedly I owe this passion to a male figure in my life; my father is a pilot. In fact I'm one of three daughters but Dad didn't shy away from including us in his work life, taking us on trips where we would fly with him, stay in hotels, eat ice cream for breakfast and generally do things that our mother wouldn't approve of!

That experience of flight from a young age stayed with me, and I gravitated towards aviation years later. When I was 24, I attended a talk by a motivational speaker, who lit a fire



within me, and I realised my calling. I went home and told my parents that I was giving up university studies in accountancy to train to be a pilot. They were immensely supportive and helped solidify my mind-set.

But few girls and young people are given that kind of exposure, nor the necessary support, to break into the industry. I think this can be attributed to a number of factors, a lack of technology amongst them, particularly in private aviation. This has resulted in a cyclical problem for the industry in attracting both a

younger audience and also a younger workforce. In a world of increasing equality in areas like medicine and law, aviation has to increase its diversity to attract the right talent.

For many years, there has been a stigma for the industry in terms of its inaccessibility and therefore inability to attract new customers. The introduction of booking platforms like Stratajet has started shifting the audience towards younger passengers and this can help change the trend of those employed in the industry.

But the industry as a whole could benefit from increased awareness of the careers that are available to youngsters, some of which don't require a university degree, rather specialist training. Bringing young and diverse talent into aviation can only be a positive thing. It will bring a fresh perspective to what has recently been a stagnant market.

If the industry can move past that associated stigma, it can look forward to good times. With the help of young, bright, energetic and creative talent, Business Aviation can fly even higher.

For more information:
www.stratajet.com

An aerial view from an airplane window showing the wing and the city of London below, including the Tower Bridge and the River Thames. The image is overlaid with a purple geometric shape on the right side.

HOW MILLENNIALS SEE THE FUTURE OF BUSINESS AVIATION

SECTION

05

COUNTRY DATA

THE BIG FOUR BUSINESS AVIATION COUNTRIES

Our survey gathered 2,000 responses from Millennials based in France, Germany, Switzerland and the United Kingdom. These are the four largest Business Aviation countries - by fleet and operations - in Europe. Germany has by far the biggest based fleet (726) and the most jobs (35,731), the UK comes second in both jobs and fleet, France has the largest number of departures (127,923), while Switzerland has an exceptionally high per capita rate in all three criteria. The following section provides key country data for all four countries.

FRANCE



56% OF FRENCH MILLENNIALS BELIEVE THAT SUSTAINABLE PERSONAL AIR TRANSPORT WILL DRASTICALLY CHANGE SOCIETY

BELIEVE THAT SUSTAINABLE PERSONAL AIR TRANSPORT WILL DRASTICALLY CHANGE SOCIETY

01

TOP THREE MEGATRENDS THAT WILL IMPACT PERSONAL AIR TRANSPORT

- 1. Climate change → 36.6%
- 2. Digitisation → 30.2%
- 3. Artificial intelligence → 15.2%

02

THREE MOST IMPORTANT BENEFITS OF BUSINESS AVIATION

- 1. The flexibility to go where you need, when you need → 62%
- 2. Travel-time saving → 62%
- 3. Prestige/status → 50%

03

ATTITUDES ON AUTONOMOUS AIR TRANSPORT

- 49.4% of French Millennials would like to use **AUTOMATED RIDE-SHARING** in the future
- 46.8% of French Millennials would like to own an **AUTONOMOUS PERSONAL AIR TRANSPORT** option in the future

04

BIGGEST PERCEIVED BARRIER TO SUSTAINABLE PERSONAL AIR TRANSPORT

- 1. Cost → 49%
- 2. Safety → 36.6%
- 3. Aviation and airspace regulation → 36%

05

TOP THREE AREAS THEY SEE JOB CREATION IN BUSINESS AVIATION

- 1. Research & innovation → 53%
- 2. Engineering → 45%
- 3. Piloting → 31%

06

TOP THREE FACTORS MAKING A CAREER IN BUSINESS AVIATION ATTRACTIVE

- 1. Awareness of job opportunities → 35%
- 2. The opportunity to travel → 35%
- 3. The opportunity for career progression → 33%

46% OF FRENCH MILLENNIALS ARE CURIOUS TO LEARN MORE ABOUT INNOVATIVE TRENDS IN BUSINESS AVIATION

GERMANY



55% OF GERMAN MILLENNIALS BELIEVE THAT SUSTAINABLE PERSONAL AIR TRANSPORT WILL DRASTICALLY CHANGE SOCIETY

BELIEVE THAT SUSTAINABLE PERSONAL AIR TRANSPORT WILL DRASTICALLY CHANGE SOCIETY

01

TOP THREE MEGATRENDS THAT WILL IMPACT PERSONAL AIR TRANSPORT

- 1. Climate change → 43%
- 2. Digitisation → 37%
- 3. Urbanisation → 9.4%

02

THREE MOST IMPORTANT BENEFITS OF BUSINESS AVIATION

- 1. Travel-time saving → 66%
- 2. The flexibility to go where you need, when you need → 63%
- 3. Increased work productivity (ability to work onboard) → 43%

03

ATTITUDES ON AUTONOMOUS AIR TRANSPORT

- 42% of German Millennials would like to use **AUTOMATED RIDE-SHARING** in the future
- 45% of German Millennials would like to own an **AUTONOMOUS PERSONAL AIR TRANSPORT** option in the future

04

BIGGEST PERCEIVED BARRIER TO SUSTAINABLE PERSONAL AIR TRANSPORT

- 1. Cost → 53%
- 2. Carbon footprint → 36%
- 3. Safety → 35%

05

TOP THREE AREAS THEY SEE JOB CREATION IN BUSINESS AVIATION

- 1. Research & innovation → 61%
- 2. Engineering → 45%
- 3. Aircraft management → 43%

06

TOP THREE FACTORS MAKING A CAREER IN BUSINESS AVIATION ATTRACTIVE

- 1. Attractive benefits → 48%
- 2. The opportunity for career progression → 42%
- 3. Flexible working conditions → 36%

63% OF GERMAN MILLENNIALS ARE CURIOUS TO LEARN MORE ABOUT INNOVATIVE TRENDS IN BUSINESS AVIATION

SWITZERLAND



59% OF SWISS MILLENNIALS

BELIEVE THAT SUSTAINABLE PERSONAL AIR TRANSPORT WILL DRASTICALLY CHANGE SOCIETY

01

TOP THREE MEGATRENDS THAT WILL IMPACT PERSONAL AIR TRANSPORT



1. Climate change → **43%**
2. Digitisation → **30%**
3. Urbanisation → **12%**

02

THREE MOST IMPORTANT BENEFITS OF BUSINESS AVIATION



1. The flexibility to go where you need, when you need → **61%**
2. Travel-time saving → **61%**
3. Increased work productivity (ability to work onboard) → **37%**

03

ATTITUDES ON AUTONOMOUS AIR TRANSPORT



- 44% of Swiss Millennials would like to use **AUTOMATED RIDE SHARING** in the future
- 42% of Swiss Millennials would like to own an **AUTONOMOUS PERSONAL AIR TRANSPORT** option in the future

04

BIGGEST PERCEIVED BARRIER TO SUSTAINABLE PERSONAL AIR TRANSPORT



1. Cost → **49%**
2. Carbon footprint → **40%**
3. Safety → **33%**

05

TOP THREE AREAS THEY SEE JOB CREATION IN BUSINESS AVIATION



1. Research & innovation → **52%**
2. Engineering → **40%**
3. Piloting → **31%**

06

TOP THREE FACTORS MAKING A CAREER IN BUSINESS AVIATION ATTRACTIVE



1. Awareness of job opportunities → **35%**
2. The opportunity to travel → **35%**
3. Aircraft management → **32%**



59% OF SWISS MILLENNIALS ARE CURIOUS TO LEARN MORE ABOUT INNOVATIVE TRENDS IN BUSINESS AVIATION

UNITED KINGDOM



65% OF BRITISH MILLENNIALS

BELIEVE THAT SUSTAINABLE PERSONAL AIR TRANSPORT WILL DRASTICALLY CHANGE SOCIETY

01

TOP THREE MEGATRENDS THAT WILL IMPACT PERSONAL AIR TRANSPORT



1. Climate change → **39%**
2. Digitisation → **35%**
3. Artificial intelligence → **11%**

02

THREE MOST IMPORTANT BENEFITS OF BUSINESS AVIATION



1. The flexibility to go where you need, when you need → **55%**
2. Travel-time saving → **52%**
3. Increased work productivity (ability to work onboard) → **45%**

03

ATTITUDES ON AUTONOMOUS AIR TRANSPORT



- 48% of British Millennials would like to use **AUTOMATED RIDE SHARING** in the future
- 48% of British Millennials would like to own an **AUTONOMOUS PERSONAL AIR TRANSPORT** option in the future

04

BIGGEST PERCEIVED BARRIER TO SUSTAINABLE PERSONAL AIR TRANSPORT



1. Cost → **49%**
2. Carbon footprint → **40%**
3. Safety → **33%**

05

TOP THREE AREAS THEY SEE JOB CREATION IN BUSINESS AVIATION



1. Engineering → **58%**
2. Research & innovation → **44%**
3. Piloting → **32%**

06

TOP THREE FACTORS MAKING A CAREER IN BUSINESS AVIATION ATTRACTIVE



1. Attractive benefits → **43%**
2. The opportunity for career progression → **35%**
3. The opportunity to travel → **35%**



52% OF BRITISH MILLENNIALS ARE CURIOUS TO LEARN MORE ABOUT INNOVATIVE TRENDS IN BUSINESS AVIATION



THE ABILITY TO GO WHERE YOU NEED, WHEN YOU NEED IS A SIGNIFICANT MOBILITY FACTOR FOR YOUNG PEOPLE. THE HISTORY OF FLYING AND BUSINESS AVIATION IS A JOURNEY WRITTEN BY PIONEERING INDIVIDUALS AND DRIVEN BY THE DESIRE FOR PERSONAL FREEDOM: THIS PRINCIPLE CONNECTS PAST AND FUTURE GENERATIONS.

THE FREEDOM OF FLIGHT

1783

Montgolfier brothers use a hot air balloon to travel over nine km in 25 minutes

1909

Louis Blériot makes the first flight across the English Channel

1919

John Alcock and Arthur Brown make the first transatlantic flight, taking less than 16 hours

1931

German airship company DELAG begins offering first scheduled passenger journeys between Europe and the US

1953

New York Airways operates 20 repurposed military helicopters for short-distance transfers between helipads in New York

1969

First man on the Moon

1974

First unmanned solar flight

1981

MacCready Solar Challenger makes the first international solar flight, flying across the English Channel

2000^s

European Commission and European Parliament officially recognise the value of Business Aviation

2017

In the wake of Hurricane Harvey, as state and federal relief efforts mobilise, Business Aviation acts as a first responder, delivering over 100 tonnes of supplies

Autonomous air taxi service has its first test flight in Dubai

2018

European Business Aviation provides over 374,000 direct & indirect jobs and serves over 103,000 city connections, 96% of which offer no commercially scheduled flights

2006

European business aircraft fleet grows to 2,900

1903

Wright brothers make the first controlled, sustained flight of a powered, heavier-than-air aircraft

1920^s

Business Aviation era begins as operators and airplane manufacturers commit to foster safety, recognition, proportionate regulation and access to vital airports

1947

First supersonic flight successfully breaks the sound barrier

1957

First satellite in space

1977

International Business Aviation Association, the precursor to EBAA, is founded in Eindhoven

METHODOLOGY

The survey was carried out by ThinkYoung on behalf of the European Business Aviation Association (EBAA) to gather the views of Millennials, aged between 18-25, on the future of sustainable personal air transport.

The survey consisted of 15 questions in four core areas: Business Aviation, innovative mobility solutions and smart air transport, empowering people through pioneering technology, and building sustainable communities.

The questions were mainly close-ended, multiple choice options. They were conducted online between February 23 and March 1. In total, 2,000 responses were gathered, split evenly among residents of France, Germany, Switzerland and the United Kingdom.

ABOUT EBAA

The European Business Aviation Association or EBAA, is a non-profit association based in Belgium that has existed since 1977. Its 715 member companies span all aspects of the Business Aviation sector in Europe and elsewhere.

The EBAA's aim is to promote excellence and professionalism amongst its members and to ensure that Business Aviation is properly recognised as a vital sector of the European economy. EBAA represents corporate operators, commercial operators, manufacturers, airports, fixed-base operators, and Business Aviation service providers.

EBAA deals with challenging issues such as the EU's Single European Sky initiative, environmental issues like emissions trading, relations with the European Aviation Safety Agency (EASA), and rulemaking processes like fees, security and access to both airports and airspace. It is the leading advocate and communications platform for the European Business Aviation sector.

EBAA is a founding member of the International Business Aviation Council (IBAC), through which member interests are represented at the International Civil Aviation Organization (ICAO).

Among the national associations that are full members of EBAA are:

BBGA (British and General Aviation Association), EBAA France, SBAA (Swiss Business Aviation Association), GBAA (German Business Aviation Association), IBAA (Italian Business Aviation Association), MBAA (Malta Business Aviation Association) and RUBAA (Russian United Business Aviation Association).

Please contact us at communications@ebaa.org.

ABOUT THINKYOUNG

ThinkYoung is the first think tank to focus on young people. It was founded in Brussels in 2007 and now has offices in Geneva, Madrid and Hong Kong.

It is a not-for-profit organisation, with the aim of making the world better for young people by engaging with them, while providing decision-makers with high quality research on key issues affecting young people.

ThinkYoung conducts studies and surveys, makes documentary movies, writes policy proposals and develops education programmes. ThinkYoung projects have reached over 600,000 young people to date.

This research has been carried out by ThinkYoung, Brussels.

Project Team:

Matthew Clemo, Delila Kidanu, Andrea Gerosa.

Acknowledgments:

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Special thanks to the dedicated team at Burson-Marsteller for their continued support of the project.

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#ExpandingHorizons



RECOMMENDATIONS & COMMITMENT

A MESSAGE FROM BUSINESS AVIATION TO THE NEXT GENERATION

If the past few years have taught us anything, it is that traditions are easily overturned. The trends that we see changing the world suggest that Business Aviation is becoming more accessible than ever. We have listened to you, and we are grateful for your insights. You see us and the world with fresh eyes, and that has in turn given us a new perspective.

We believe you have a lot to tell us. Our survey of Millennial opinions has been very revealing. It has shown what you really think about us, about transport and travel, and about the megatrends shaping the world.

You have different attitudes about travel compared with previous generations: your views are much more functional and flexible. You see climate change as the biggest challenge for the planet, and you want aviation to offer pioneering solutions. You strongly believe that sustainable personal air transport can change our societies as we know them.

We hope that this is a starting point for many more activities to come and we will continue our work towards the goals and values that you share. We thank you again for taking the time to help us understand your views. We hope to see each other again soon.

In the mean time you can learn more about Business Aviation by visiting <https://expandinghorizons.com>

All the best

Robert Baltus,
Chief Operating Officer, EBAA

WE WANT TO TELL YOU HOW WE ARE TAKING YOUR MESSAGE ON BOARD. THESE ARE OUR COMMITMENTS TO YOU

1 SUSTAINABLE TECHNOLOGIES

Firstly, on climate change, we share your concerns about the damage that air transport can have on the environment. We recognise that we are not only part of the problem but can play a vital role in the solution. We have committed to reducing our emissions (50% reduction in CO2 emissions by 2050). Our first priority is to reduce the use of fossil fuels. We are part of the International Civil Aviation Organization (ICAO), a specialized United Nations agency, which has set up the Carbon Offsetting and Reduction Scheme for International Aviation (CORSI/A). This commitment does not just apply to our energy use, but our manufacturing, our infrastructure and our operations.

2 CREATING THE JOBS OF THE FUTURE

Secondly, we will continue to invest in research and technology to ensure we are a pioneering industry which has the ambition to shape the future of sustainable personal air transport. We want people to travel fast, quietly, safely and with minimal impact on the environment. Our innovations are helping achieve that, with technologies like winglets and new avionics systems to improve flight efficiency, and new composite materials to build stronger and lighter aircraft. We are also using other technologies, for example, computer designs of new prototypes and online booking systems.

3 BECOMING OPEN AND ACCESSIBLE

Thirdly, we are becoming more open and accessible than ever before. We see your point about how Business Aviation is often seen as an exclusive realm, one characterised by closed doors and exclusivity. But chartering a plane has never been easier. For people thinking of a career in Business Aviation, there are more diverse job opportunities than ever before due to the megatrends that you have identified. We feel our sector is exciting and desirable, but many of our companies are small and medium-sized enterprises which are not as well known in the aviation industry as some of the big commercial airlines. However, we are committed to becoming more open and accessible to anyone who wants to pursue a career in our industry.

RECOMMENDATIONS FROM MILLENNIALS

WHAT CAN MILLENNIALS TELL US ABOUT THE FUTURE OF BUSINESS AVIATION? SOME KEY MESSAGES EMERGE FROM OUR SURVEY. HERE ARE A FEW RECOMMENDATIONS FOR THE BUSINESS AVIATION SECTOR.

1 TELL YOUR STORY

While Millennials can grasp the main concept of Business Aviation, they miss much of what the sector does. They do not see helicopters, the medical sector or disaster relief as part of Business Aviation. Nor do they regard drones, one of the most exciting new areas of aviation, as part of the industry. All this proves that the Business Aviation sector has to do more to show what it does. Millennials want to know more about the diverse range of tasks that our industry covers, and we should share our achievements. This is more than just talk. It is a dialogue. Business Aviation has a commitment to the Next Generation by reaching out to them directly. Engaging in joint innovation initiatives with young people will help all of us to invent the future together.

2 DRIVE SUSTAINABLE TECHNOLOGY

For Millennials, the biggest challenge of their generation is climate change. This megatrend dominates their global outlook, and their views on Business Aviation are seen through this prism. And yet, the industry is doing much more than many people think. The sector is pioneering sustainability projects and developing carbon neutral technologies. These initiatives include an industry-wide commitment that technological, infrastructure, and operational efficiency measures which will be part of the Carbon Offsetting and Reduction Scheme for International Aviation (CORSI/A) after 2020. Business Aviation is often at the forefront of innovation in the development of alternatives such as electrification. The sector has launched initiatives to conserve resources, institute recycling and promote green practices, including Optimized Descent Profiles (a glide at idle power-down to the runway threshold). Emphasising our environmental commitments and pioneering spirit goes hand in hand with finding opportunities for Millennials to share their ideas with the industry to turn visionary thinking into reality.

3 FLYING IS FREEDOM

Sustainable personal air transport is an emerging concept, and for some, it is still a long way in the future. However, Millennials see it just like any new vehicle, from a bicycle to a car to a private plane: a tool to go where you want, when you want. It may seem like a basic mobility instinct, and it is the one that resonates most strongly with young people. This desire for personal freedom is what we can offer when engaging with the younger generation. It serves as a reminder to us all that mobility motivations are about freedom and efficiency.

Millennials might not often be exposed to the world of Business Aviation, but they certainly have views about the industry. In time, many will work in the industry and some will even become customers. Their views will help shape the sector over the coming decades, so it's essential to listen to understand their views, interests and values. Millennials can also show Business Aviation where to look for new ideas, markets and opportunities.

4 THE FUTURE IS NEAR

The question on sustainable personal air transport revealed that Millennials have mixed expectations about flying cars happening any time soon. This is despite the fact that they are nearly here: prototypes are being developed, tested and even used. They will be here much, much sooner than most Millennials think. As we are part of the innovation mix, we also need to be part of the conversation when it comes to novel technologies and sustainable personal air transport. We need to speak louder about our brilliant, emerging projects, as they show young people how it is a sector of cutting edge design and innovation.

5 NOT SO FAST

New technologies and concepts face all sorts of obstacles, not least public confidence. While Millennials are positive about ride-sharing personal air transport, their enthusiasm drops - although much more sharply with women than with men - when they are offered an automated, pilotless version. Since automated cars are already controversial, it should not come as a surprise that automated planes are too. Younger generations tend to be the early adopters of technology. We need to ensure for the Next Generation that safety, trust and adequate regulation accompany the journey into the future.

6 BE OPEN AND APPROACHABLE

Business Aviation offers many exciting careers, but Millennials see their career prospects in the sector as they might any other job: they are looking for opportunities for career progression, purpose, and an attractive benefits package. Like most younger generations, they are more open and liberal than their elders, so diversity and adaptability matter a lot for them. They have high expectations of their employers, including flexible and tailored conditions, and a strong commitment to equal opportunities. At the same time, the job profile in Business Aviation is changing too: there are many positions emerging in areas like artificial intelligence and digital design that Millennials are much more adept at. We need to attract talent with pioneering and desirable conditions - and an open door to anyone.