



User Survey 2014

November, 2014

Prepared for



Prepared by:

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Confidential



Background And Objectives

- The International Registry of Mobile Assets was launched in March 2006.
- Once established, it was decided to conduct a User Establishment Survey during May 2007, the objectives of which were:
 - ❖ To understand how different features and usability levels were rated, and relative importance of each.
 - ❖ To understand Users' priorities for updating the Registry features.
 - ❖ To understand what the perception was as to the cost of usage versus its worth to their organisation.
 - ❖ To initiate a repeatable annual benchmark survey.
- Having addressed the key issues emerging from the 2007 exercise, it was decided to repeat the survey in 2008 and again in 2009, 2010, 2011, 2012, 2013 and 2014 with a view to assessing the state of play year on year.



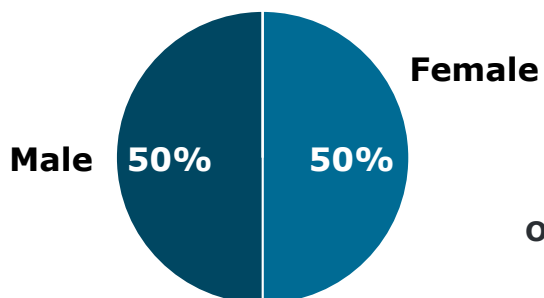
Methodology

- Online survey of Registry users, by way of structured questionnaire.
- Potential respondents initially contacted by Aviareto, with survey rationale explained.
- Questionnaire mailed to total contact sample of 2,470 users.
- Total achieved sample of 352 users (345 users in 2013, 349 users in 2012, 402 users in 2011, 356 users in 2010, 371 in 2009, 308 in 2008; 339 in 2007), representing a response rate of 14.25% - at the upper end of response rates for a survey of this nature.
- The interviews were completed in English, Spanish and French.
- Fieldwork took place between 8th October – 3rd November, 2014. Incentive offered for the first time in 2009 (3 x draws for \$250 Amazon voucher), and each year since then.
- **NB:** Prior to 2012, the Helpdesk was referred to as the Montreal Helpdesk and the Registry Officials were referred to as Registry Officials in Dublin. From 2012, the Montreal Helpdesk was replaced with a Helpdesk in Ireland. For simplicity all related questions now refer to Registry Officials and the Helpdesk, ignoring geography.

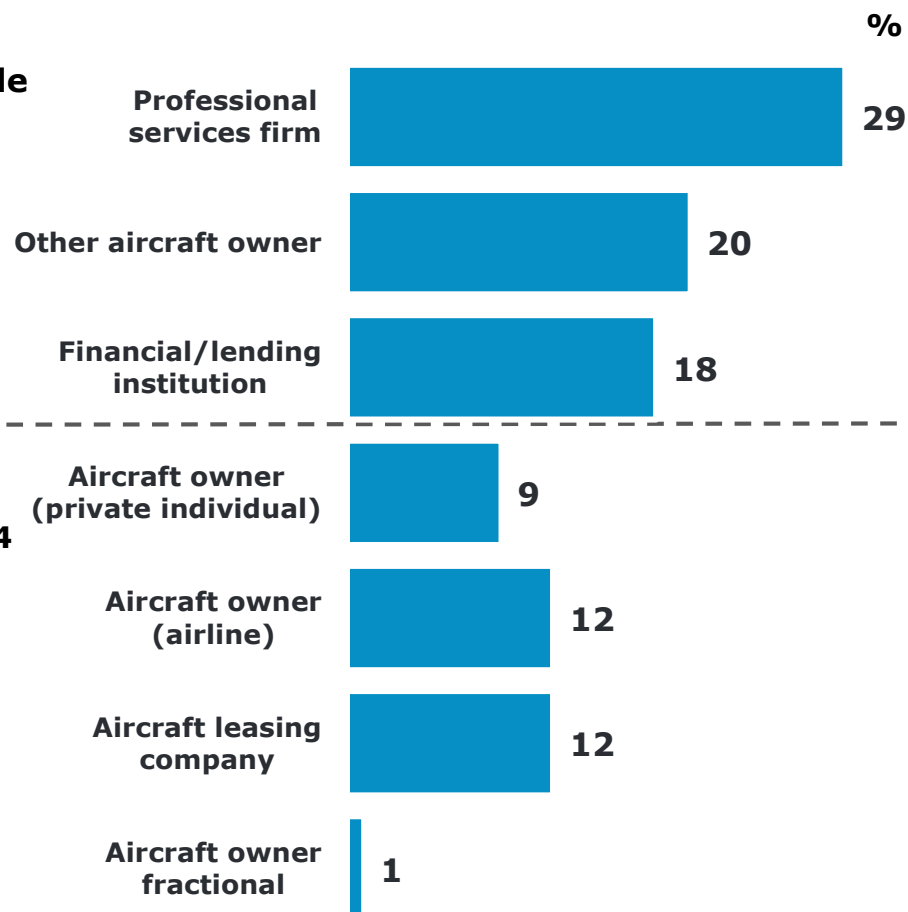
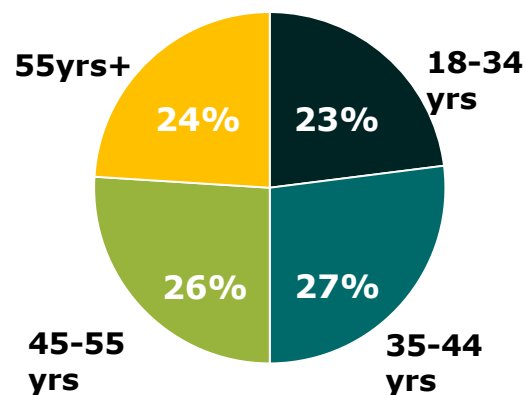


Sample Profile 2014

GENDER



AGE



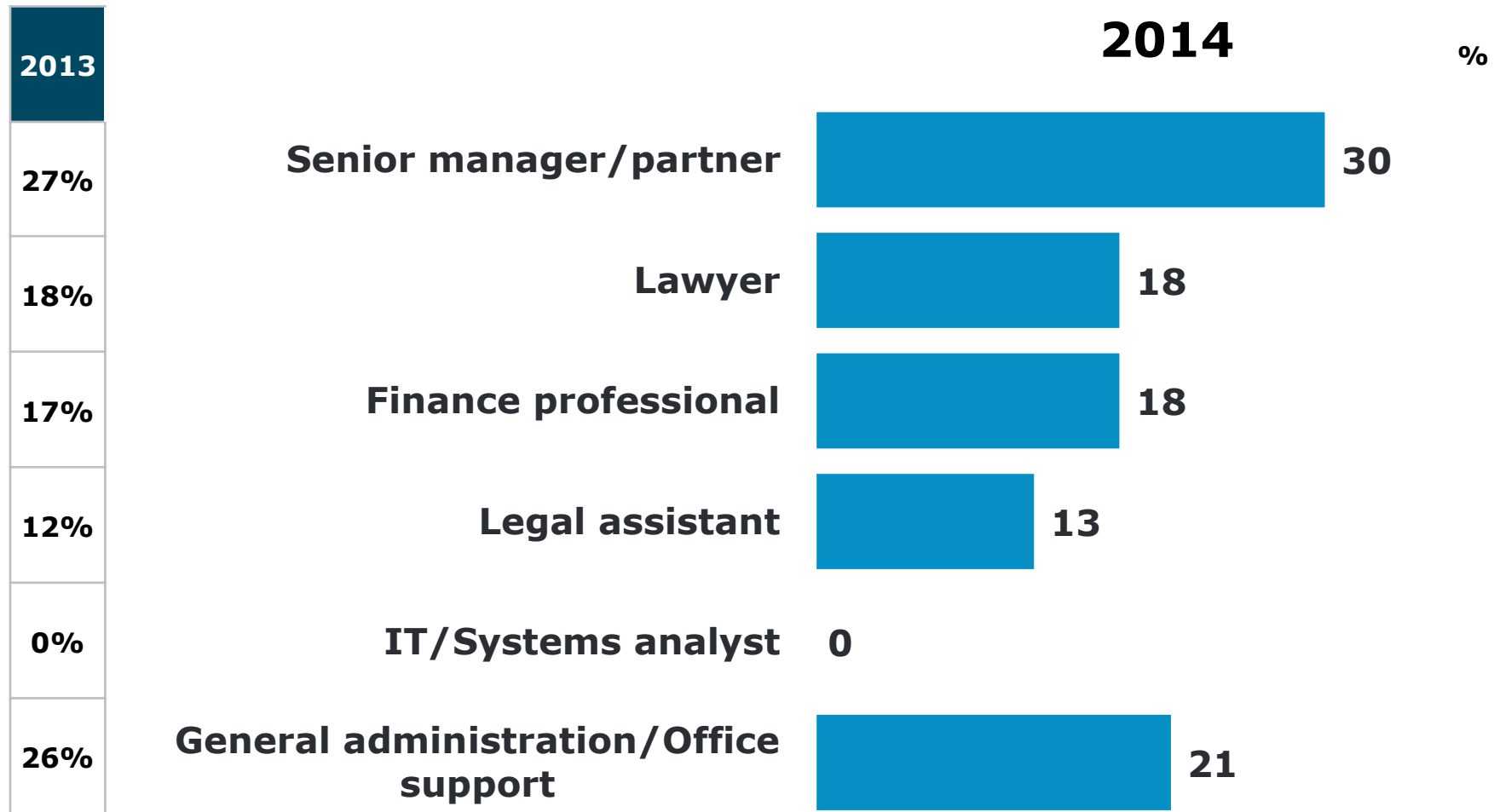
	2013	2012	2011	2010	2009	2008	2007
Professional services firm	30%	26%	24%	27%	28%	29%	17%
Other aircraft owner	17%	21%	18%	19%	19%	23%	32%
Financial/lending institution	17%	20%	23%	21%	19%	17%	17%
Aircraft owner (private individual)	8%	8%	10%	10%	13%	14%	18%
Aircraft owner (airline)	15%	13%	12%	8%	11%	9%	7%
Aircraft leasing company	12%	11%	12%	13%	8%	8%	8%
Aircraft owner fractional	2%	1%	1%	2%	2%	n/a	n/a

Sample Profile 2014

	2007	2008	2009	2010	2011	2012	2013	2014
Gender	%	%	%	%	%	%	%	%
Male	63	44	47	50	50	50	48	50
Female	37	55	53	50	50	50	52	50
Age	%	%	%	%	%	%	%	%
18-34	13	17	19	20	20	19	20	23
35-44	22	24	29	28	28	30	30	27
45-55	39	32	32	31	31	29	29	26
55+	26	26	21	22	22	22	21	24

With users evenly split by gender, and spread across all age groups from 18-34 yrs to 55 yrs+.

Sample Profile 2014



Marginally more senior managers/partners emerge in the user base this year with fewer general administrative staff.

Sample Profile 2014

Social Media Usage

				2014				
	Total			Gender		Age		
	2014	2013	2012	Male	Female	18-44	45-54	55+
Base:	352	345	349	176	176	177	90	85
	%	%	%	%	%	%	%	%
Facebook	54	57	52	44	64	67	48	33
Linkedin	53	48	43	55	52	57	57	42
Twitter	16	18	16	14	18	21	14	7
Other	6	4	4	3	9	7	4	5
None	24	27	32	29	19	15	24	44
Any Facebook/Linkedin	73	70	66	69	77	82	73	53
Any Facebook/Linkedin/Twitter	76	73	68	71	81	85	76	56

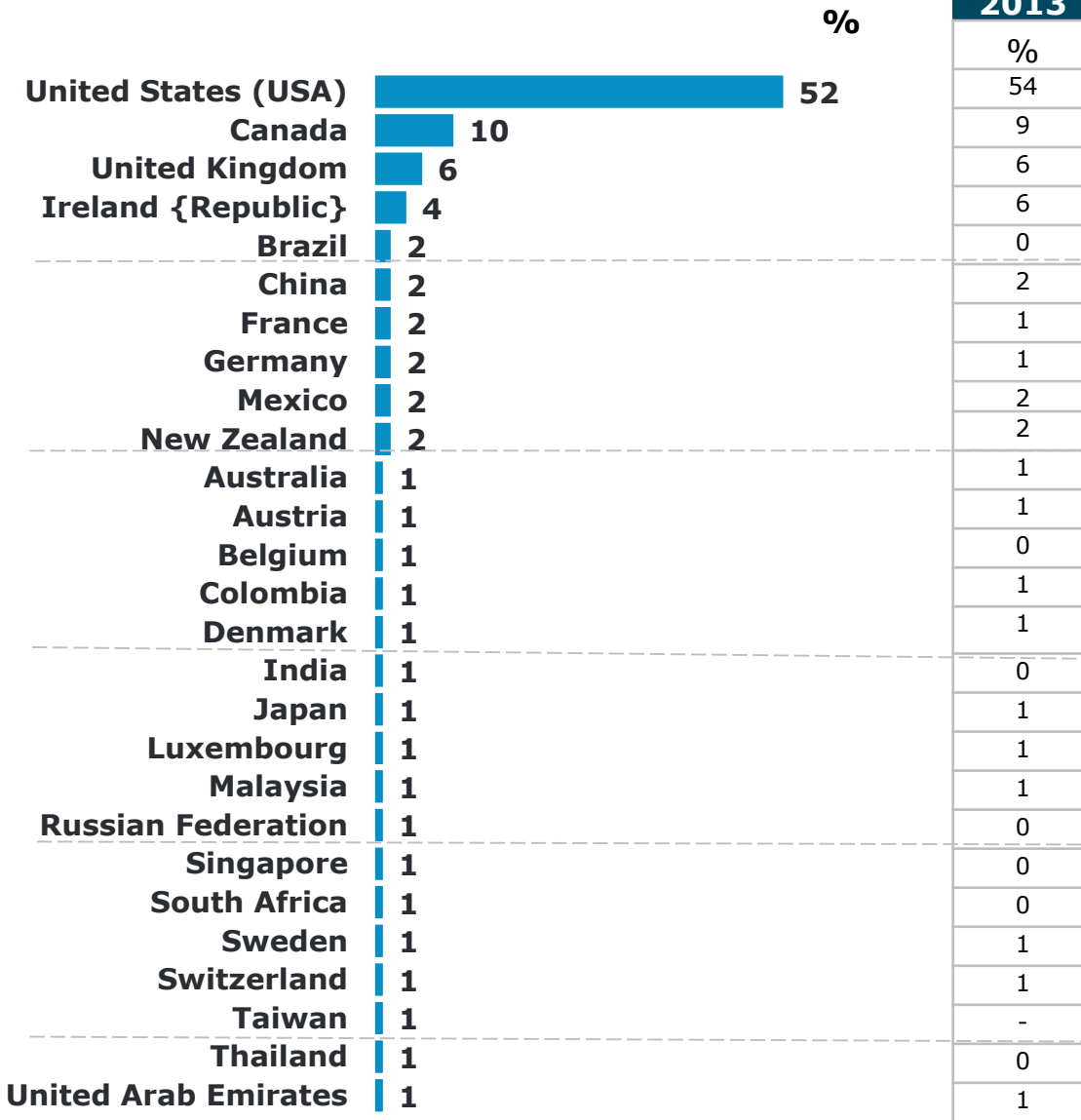
Sample Profile 2014

Social Media Usage

	Total	Organisation						Role in the organisation			
		Airline	Private	Owner	Lease company	Fin inst.	Prof firm	Senior manager /partner	Law	Finance professional	General
Base:	352	43	30	72	41	63	103	104	111	63	74
	%	%	%	%	%	%	%	%	%	%	%
Facebook	54	60	43	51	56	52	56	48	59	46	61
Linkedin	53	53	30	50	71	49	58	61	59	51	36
Twitter	16	23	7	19	15	13	17	14	21	11	16
Other	6	2	7	6	10	5	7	6	8	2	7
None	24	21	37	28	15	29	20	23	17	30	31

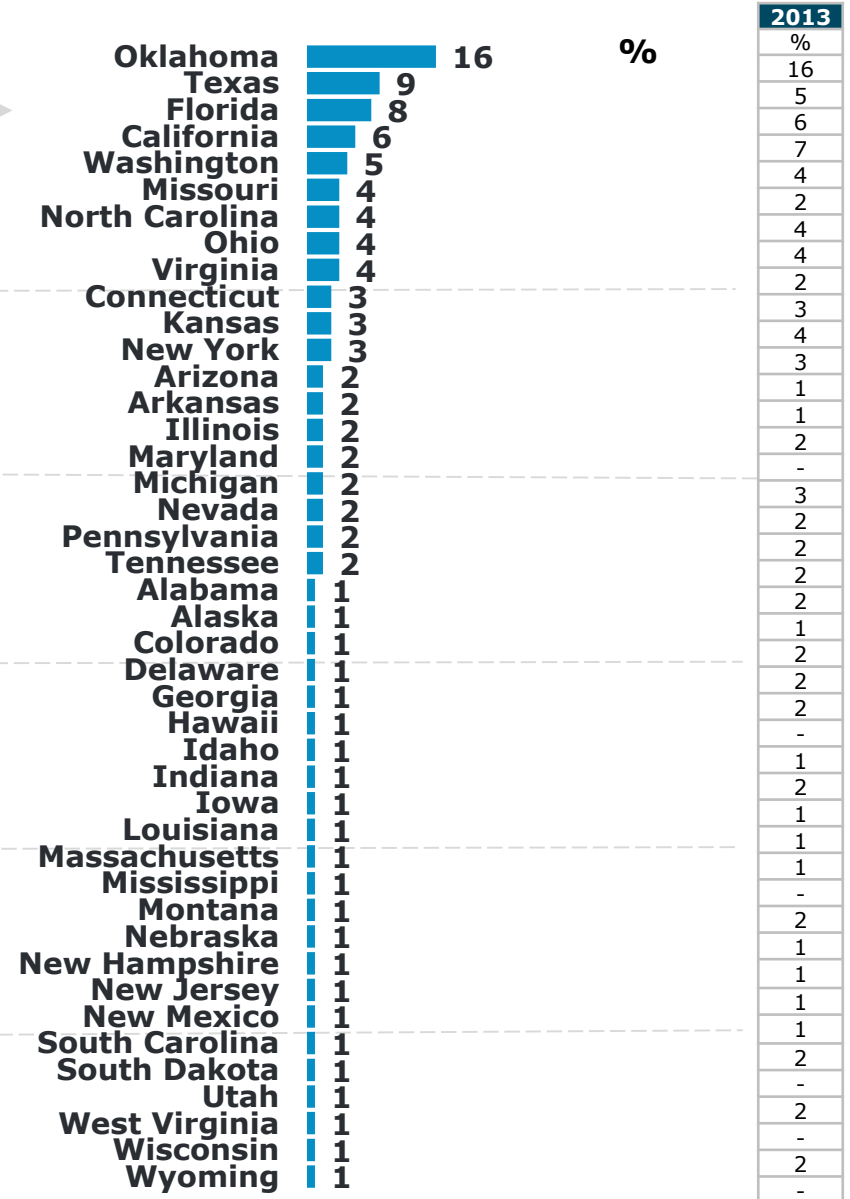
Sample Profile 2014

COUNTRY



US STATES

Base: USA respondents - 182



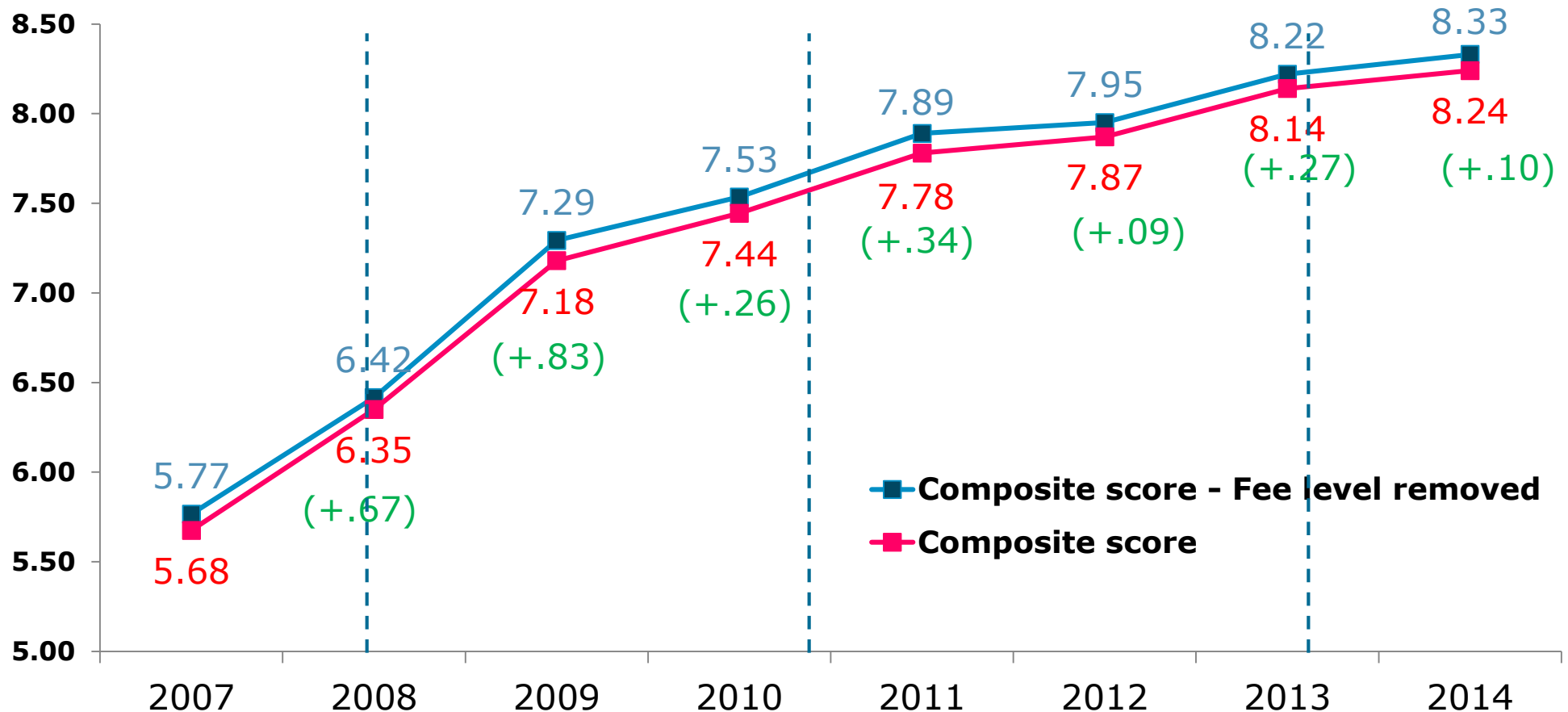
The proportion of users based in the USA is now just over half of the total user base at 52%, with users in Canada rising to 10%.

Key Service Aspects: Relative Contribution Towards Worth Of Registry To Business (Pearson’s Correlations) 2014

		2013	2012	2011	2010	2009	2008	2007
Fit of Registry and business functionality	0.78	0.75	0.81	0.76	0.78	0.83	0.8	n/a
Overall ease of use of the Registry	0.70	0.64	0.73	0.64	0.73	0.67	0.67	0.71
Level of fee charged	0.62	0.63	0.65	0.6	0.69	0.74	0.7	0.67
Speed of Registry during use.	0.60	0.54	0.62	0.45	0.59	0.56	0.56	0.57
Reliability of technical aspects of the Registry	0.58	0.56	0.64	0.5	0.64	0.58	0.52	0.59
Speed of approval for new Administrators/Users	0.55	0.48	0.64	0.42	0.53	0.45	0.59	0.49
Efficiency of resolution of queries by Registry Officials	0.55	0.57	0.56	0.44	0.61	0.49	0.6	0.58
Technical knowledge of Registry Officials regarding the Registry.	0.52	0.57	0.47	0.5	0.64	0.58	0.52	0.59
Quality of information sent to you from the Registry Officials	0.51	0.59	0.56	0.55	0.62	0.57	0.52	0.56
Efficiency of credit card transactions.	0.50	0.5	0.49	0.37	0.45	0.5	0.42	0.37
Availability of Registry Officials	0.50	0.6	0.64	0.55	0.51	0.38	0.52	0.55
Speed of refunds	0.47	0.57	0.66	0.39	0.51	0.56	0.48	0.47
Registry Officials’ language skills	0.42	0.49	0.49	0.42	0.44	0.36	0.35	0.36

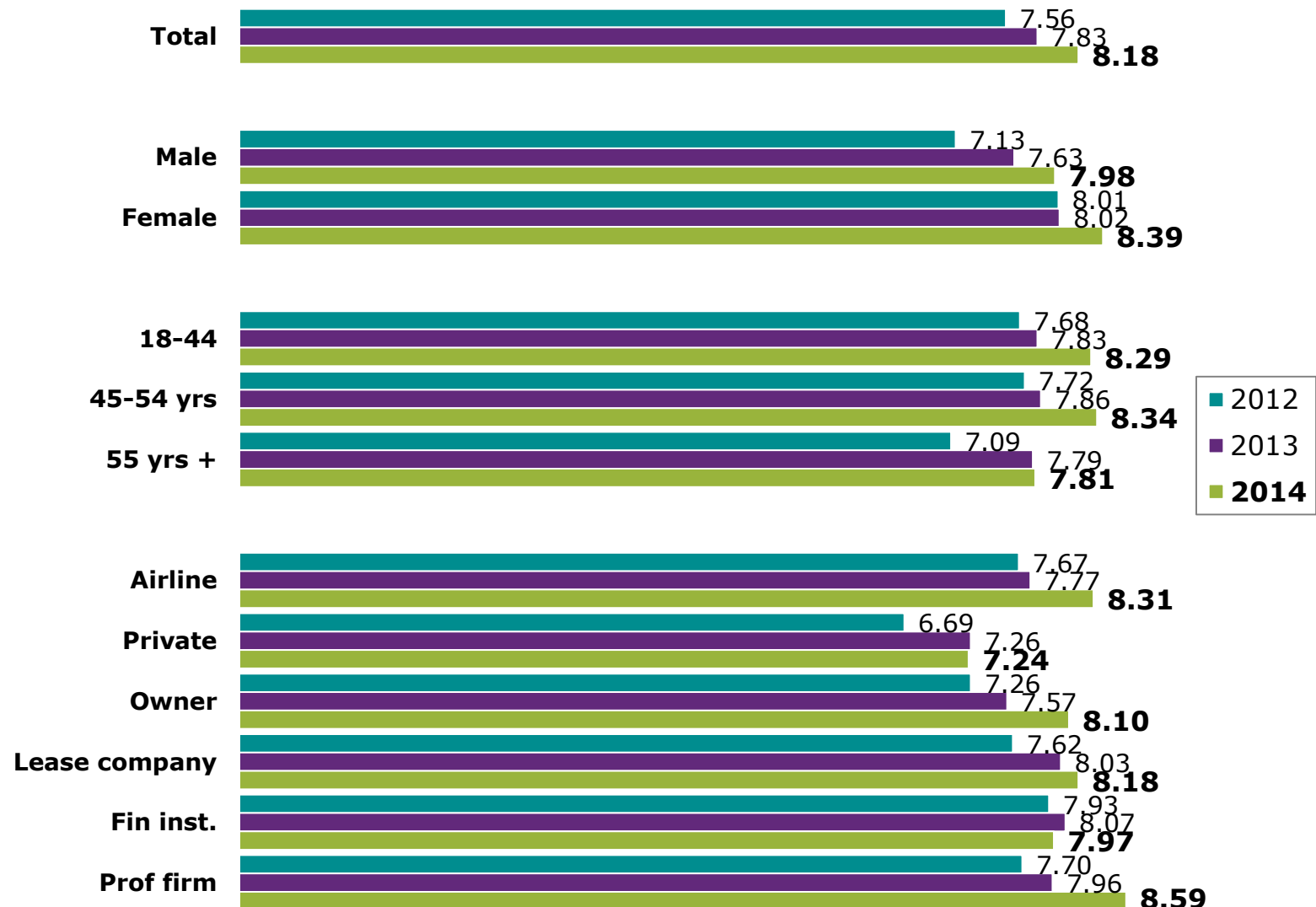
The fit of Registry functionality with business functionality remains the single most important definer of the perceived worth of the Register, followed by its Ease of Use and Fee Charged. The relative importance of all other factors remains reasonably consistent year-on-year.

Overall Weighted Registry Experience Rating

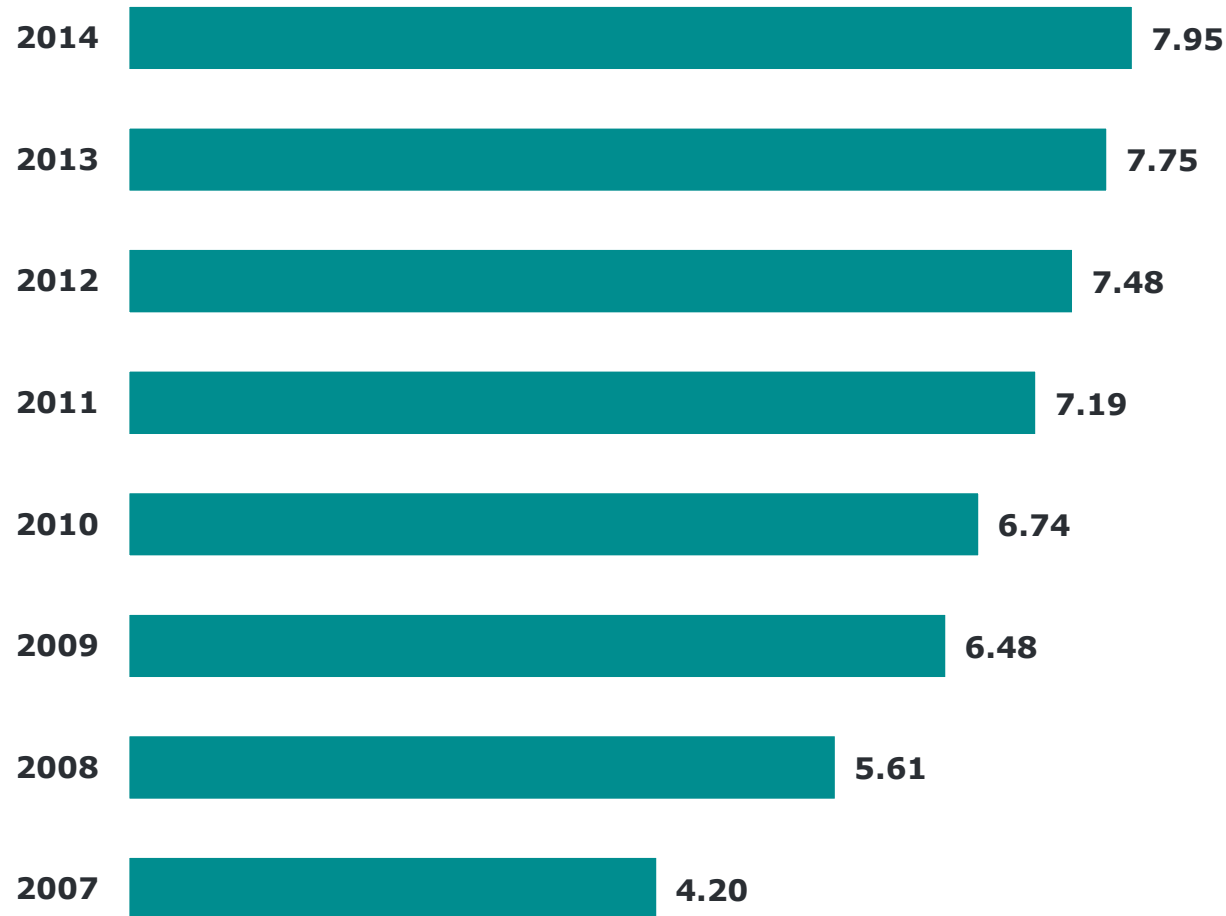


It was noted last year that historical data trends indicated that the overall experience rating had reached, or had all but reached, its peak. This analysis has come to pass, with a modest improvement in overall satisfaction, to a noteworthy high of 8.24

Overall Satisfaction with the Registry - Summary



Overall worth of registry to business: Ten point Rating Scale



Last year it was noted that the perceived worth to business rating is likely to settle in at close to 7.7, and the indications are that there is very limited scope for further significant improvements over and above this year's 7.95 in future years.

Key Service Aspects:

Overall Performance Rating (10 Point Scale)

	Mean Performance Rating					
	2014	2013	2012	2011	2010	2009
The degree to which the functionality of the Registry fits with the way your business functions.	7.75	7.46	7.18	7.12	6.7	6.42
Overall ease of use of the Registry.	7.43	7.26	6.89	7.01	6.64	6.52
Level of fee charged.	7.31	7.15	6.79	6.64	5.51	6.18
Speed of Registry during use.	8.16	7.9	7.59	7.73	7.17	7.1
Reliability of technical aspects of the Registry.	8.28	7.79	7.79	7.89	7.3	7.22
Speed of approval for new Administrators/Users	8.42	8.36	8.17	8.27	8.09	7.92
Efficiency of resolution of queries by Registry Officials	8.63	8.44	8.23	8.06	7.82	7.61
Technical knowledge of Registry Officials regarding the Registry	8.69	8.57	8.38	8.4	8.2	7.86
Quality of information sent to you from the Registry Officials	8.72	8.47	8.29	8.32	8.11	7.93
Efficiency of credit card transactions.	8.91	8.77	8.32	8.48	8.22	8.28
Availability of Registry Officials	8.57	8.38	8.02	8.08	7.64	7.41
Speed of refunds	8.39	8.17	7.74	8.14	7.01	6.69
Registry Officials' language skills	9.04	8.95	8.91	8.96	8.76	8.73
Efficiency of resolution of queries by help desk staff	n/a	8.41	8.04	7.34	7.01	6.23
Technical knowledge of help desk staff regarding the Registry	n/a	8.42	8.10	7.62	7.12	6.27
Availability of help desk staff	n/a	8.41	8.16	7.62	7.46	7.08
Helpdesk language skills	n/a	8.89	8.87	8.54	8.36	7.98

Key Service Aspects:

Overall Performance Rating (10 Point Scale)

MOST IMPORTANT

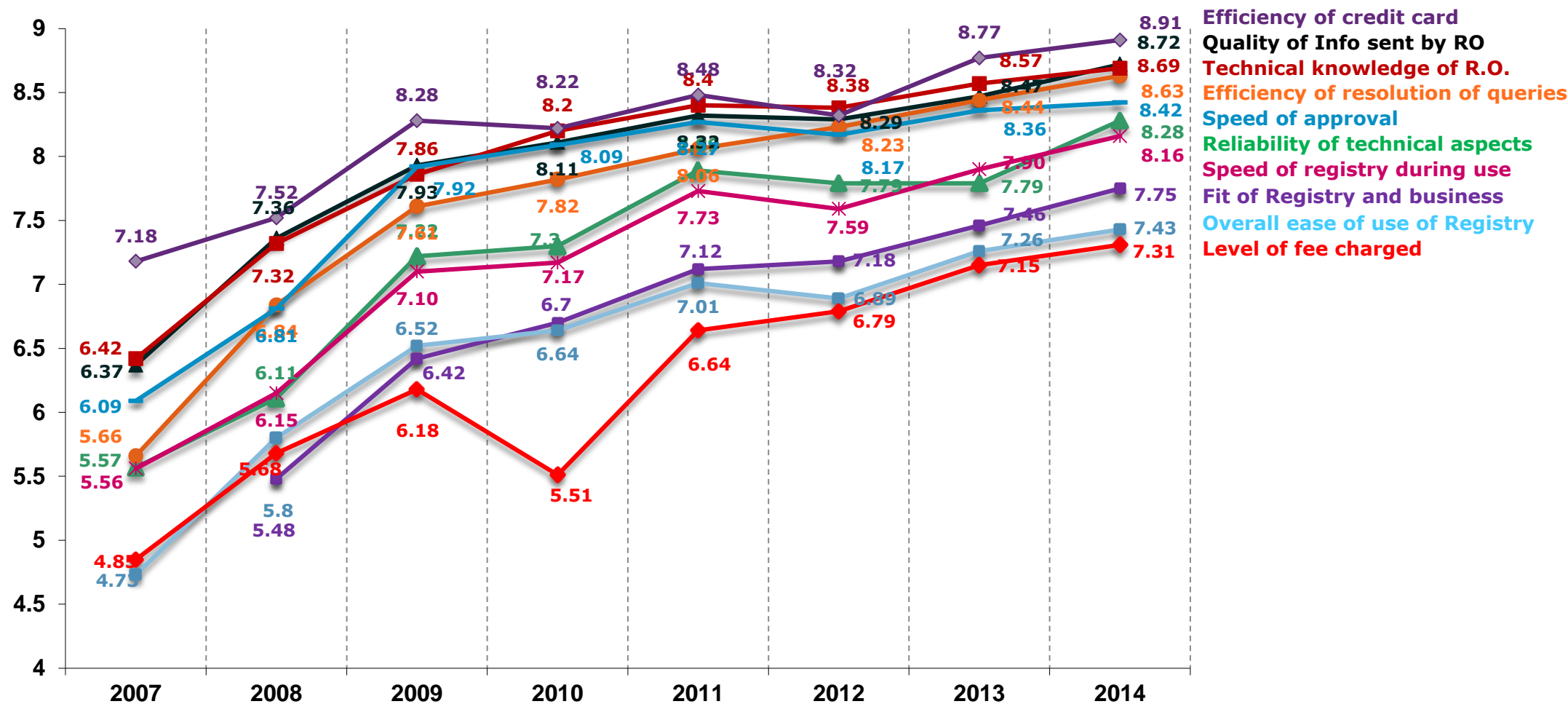
	Mean Performance Rating							% Scoring 1-2							% Scoring 9-10							% of No Opinion							YOY CHANGE 2014 vs 2013
	2014	2013	2012	2011	2010	2009	2008	2014	2013	2012	2011	2010	2009	2008	2014	2013	2012	2011	2010	2009	2008	2014	2013	2012	2011	2010	2009	2008	
Fit of Registry and business functionality	7.75	7.46	7.18	7.12	6.7	6.42	5.48	3	4	7	7	11	13	24	41	38	36	33	29	28	28	5	3	3	2	4	6	6	0.29
Overall ease of use of the Registry	7.43	7.26	6.89	7.01	6.64	6.52	5.8	5	4	9	6	12	12	20	37	37	33	27	27	27	19	1	0	1	1	2	1	4	0.17
Level of fee charged	7.31	7.15	6.79	6.64	5.51	6.18	5.68	5	5	8	8	6	11	19	33	32	25	24	25	20	18	5	6	9	6	7	7	10	0.16
Speed of registry during use	8.16	7.9	7.59	7.73	7.17	7.1	6.15	2	2	5	2	7	7	15	48	49	41	43	34	32	25	2	1	2	2	23	4	4	0.26
Reliability of technical aspects of the Registry	8.28	7.79	7.79	7.89	7.3	7.22	6.11	1	2	5	2	6	5	14	45	43	43	39	33	30	22	12	8	9	7	12	15	16	0.49
Speed of approval for new Administrators/Users	8.42	8.36	8.17	8.27	8.09	7.92	6.81	2	2	3	2	2	4	10	50	49	49	45	46	46	31	14	15	11	11	12	14	12	0.06
Efficiency of resolution of queries by Registry Officials	8.63	8.44	8.23	8.06	7.82	7.61	6.84	2	2	2	3	3	10	10	59	46	47	44	40	15	31	6	20	16	11	17	48	19	0.19
Technical knowledge of Registry Officials regarding the Registry	8.69	8.57	8.38	8.4	8.2	7.86	7.32	1	0	2	1	2	3	7	58	46	45	46	41	37	31	11	24	21	14	24	25	23	0.12
Quality of information sent to you by the Registry Officials	8.72	8.47	8.29	8.32	8.11	7.93	7.36	1	2	2	1	1	3	7	61	54	54	53	50	48	37	5	8	6	5	6	6	9	0.25
Efficiency of credit card transactions	8.91	8.77	8.32	8.48	8.22	8.28	7.52	1	0	3	1	2	1	5	64	59	49	53	50	49	41	9	11	13	10	12	15	15	0.14
Availability of Registry Officials	8.57	8.38	8.02	8.08	7.64	7.41	6.61	1	2	2	2	3	5	10	58	43	38	41	35	32	25	7	24	22	17	23	22	23	0.19
Speed of refunds	8.39	8.17	7.74	8.14	7.01	6.69	5.03	1	1	2	1	3	3	7	19	18	19	21	12	13	4	64	65	60	61	66	67	68	0.22
Registry Officials language skills	9.04	8.95	8.91	8.96	8.76	8.73	8.36	0	0	1	0	1	1	2	66	52	52	62	55	51	46	11	27	26	14	20	21	21	0.09

LEAST IMPORTANT

Just one service aspect has registered a significant year-on-year improvement – reliability of technical aspects.

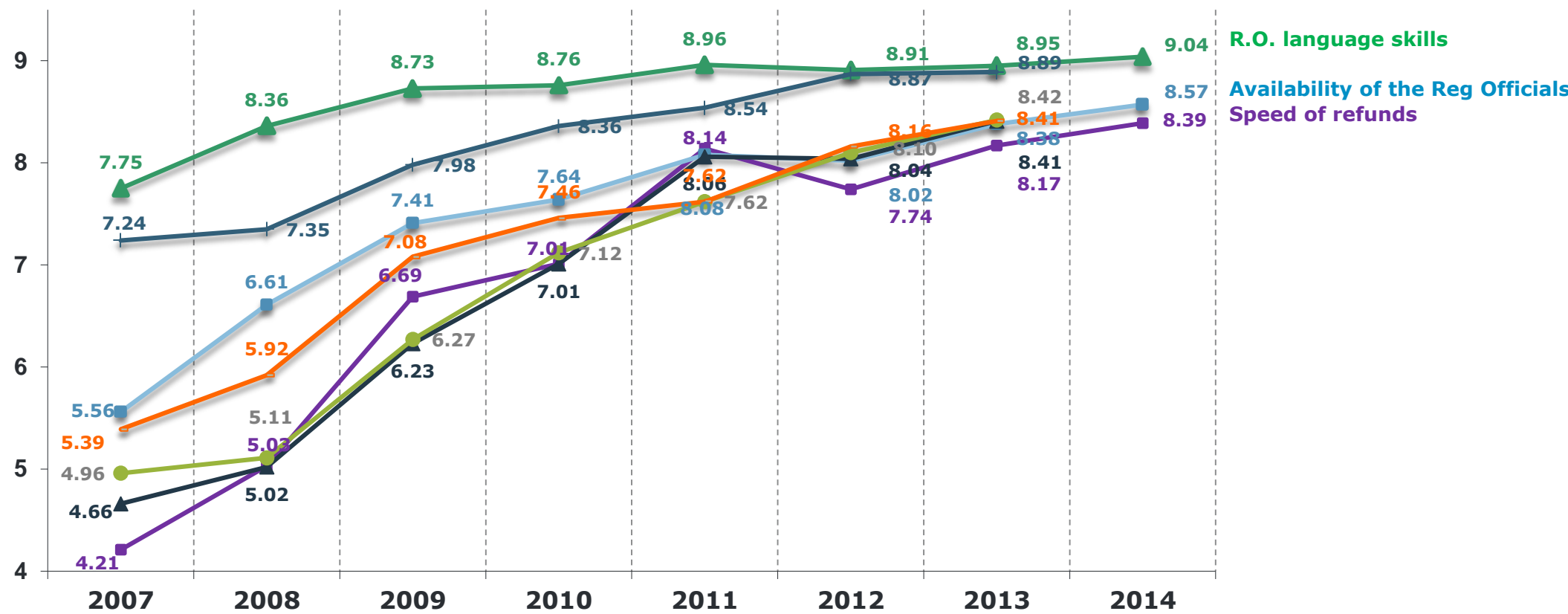
Key Service Aspects:

Overall Performance Rating (Ten Point Scale) – Top 10



Key Service Aspects:

Overall Performance Rating (Ten Point Scale) – Bottom 3



With slight improvements in satisfaction on most 'second tier' aspects also.



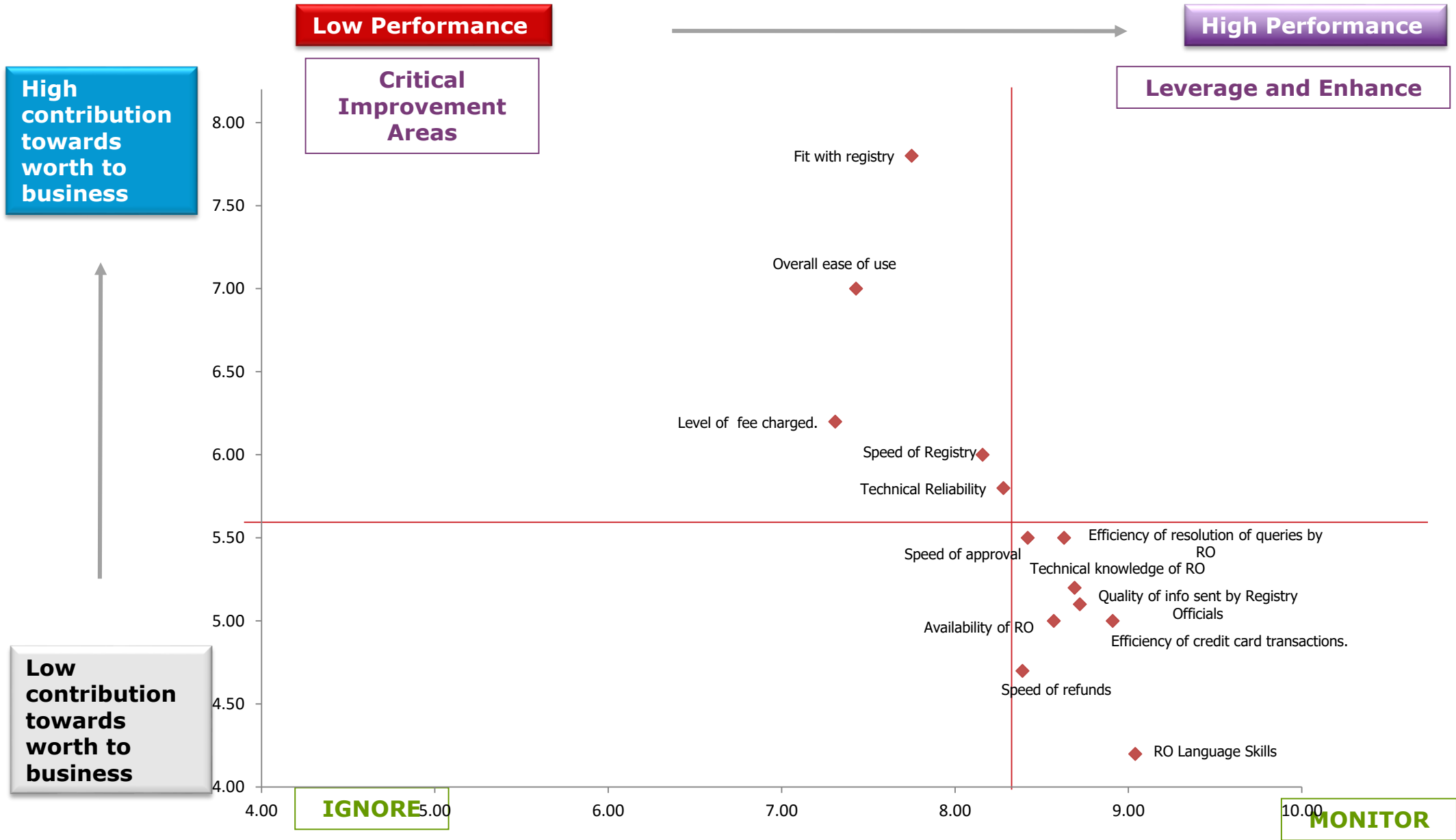
Satisfaction With The Registry x Key User

Groupings: Ten Point Rating Scale

	Total	Gender		Age			Organisation					
		Male	Female	18-44	45-54 yrs	55 yrs +	Airline	Private	Owner	Lease company	Fin inst.	Prof firm
Overall worth of the Registry to my organisation/business.	7.95	7.39	8.51	8.23	7.93	7.36	7.95	5.86	7.47	8.42	7.76	8.81
The degree to which the functionality of the Registry fits with the way your business functions.	7.75	7.48	8.01	7.88	7.89	7.31	7.76	6.67	7.57	7.92	7.44	8.25
Overall ease of use of the Registry.	7.43	7.07	7.78	7.6	7.56	6.92	7.3	5.93	7.06	7.51	7.39	8.15
Level of fee charged.	7.31	7.13	7.49	7.35	7.44	7.1	7.1	7.24	7.61	7.44	6.64	7.55
Speed of Registry during use.	8.16	7.96	8.35	8.19	8.36	7.86	8.05	7.5	8.01	8.24	8.11	8.48
Reliability of technical aspects of the Registry.	8.28	8.16	8.4	8.26	8.39	8.2	8.49	8	7.83	8.59	8.14	8.55
Speed of approval for new Administrators/Users	8.42	8.09	8.77	8.52	8.51	8.1	8.35	8.08	8.02	8.4	8.27	8.92
Efficiency of resolution of queries by Registry Officials	8.63	8.37	8.88	8.81	8.44	8.44	8.73	8.15	8.57	8.59	8.15	9.07
Technical knowledge of Registry Officials regarding the Registry	8.69	8.56	8.82	8.69	8.6	8.8	8.56	8.04	8.66	8.76	8.42	9.05
Quality of information sent to you by the Registry Officials	8.72	8.45	8.98	8.75	8.8	8.57	8.93	8.55	8.56	8.58	8.43	9.02
Efficiency of credit card transactions.	8.91	8.73	9.09	8.95	9	8.7	8.37	8.88	8.87	8.94	8.71	9.26
Availability of the Registry Officials	8.57	8.4	8.73	8.74	8.45	8.33	8.65	8.46	8.21	8.66	8.2	8.99
Speed of refunds	8.39	8.08	8.68	8.41	8.55	8.12	8.75	9.33	8.23	7.93	7.43	8.86
Registry Officials' language skills	9.04	8.97	9.11	9	9.12	9.04	8.66	9.36	9.08	9.14	8.82	9.19

Aviareto: Strategic Performance Matrix 2014

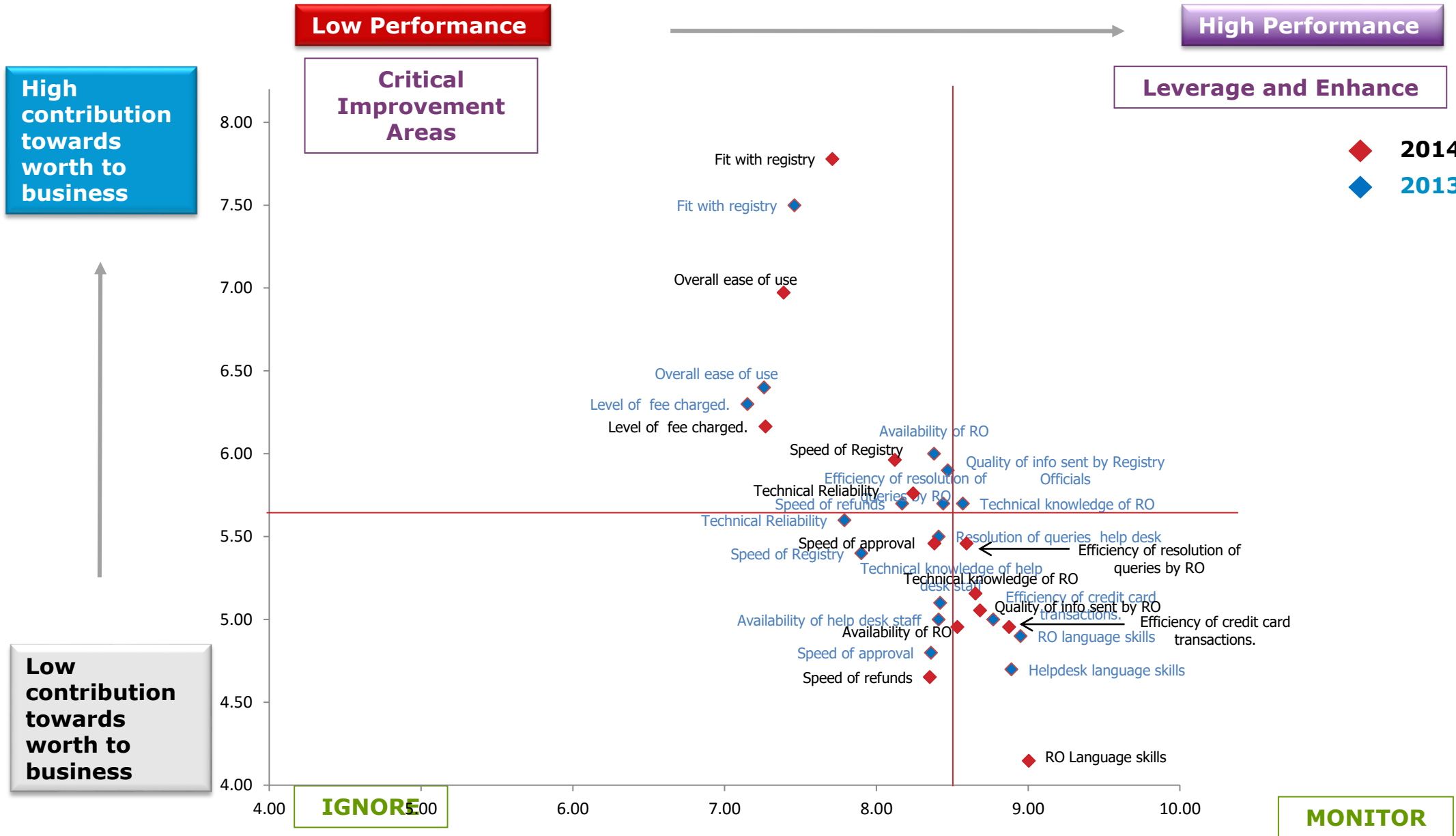
Base: All users



There is still some latitude for marginal improvements in terms of fees charged and ease of use of Registry.

Aviareto: Strategic Performance Matrix 2014 vs 2013

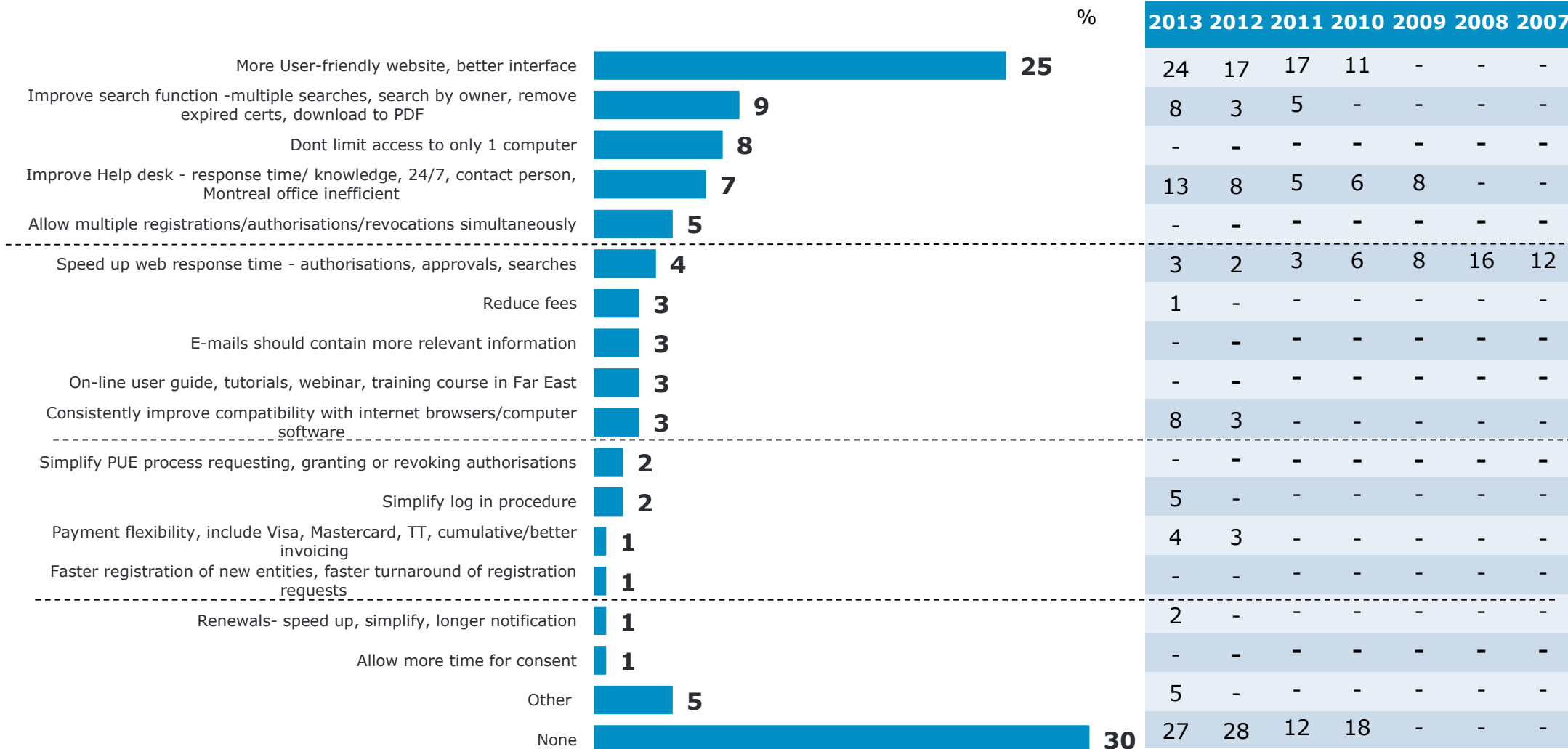
Base: All users



Notwithstanding the general improvements across the board.

Changes Or Improvements Should Be Made To The Functionality, Service or Support Of The Registry To Make It Easier To Use 2014

Base: All respondents

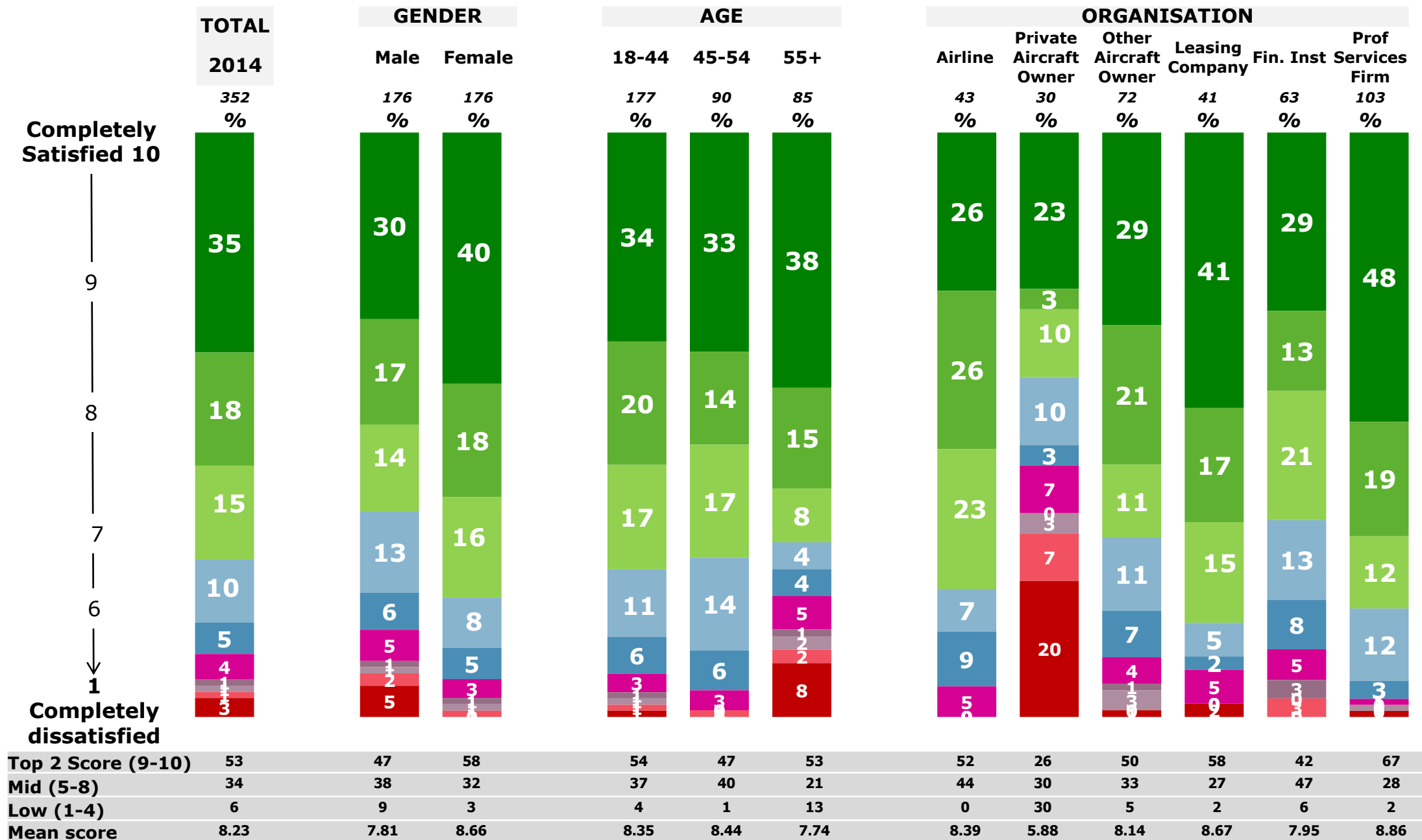


Changes Or Improvements Should Be Made To The Functionality, Service or Support Of The Registry To Make It Easier To Use 2014

Base: All users

	Total	Gender		Age			Organisation					
		Male	Female	18-44	45-54 yrs	55 yrs +	Airline	Private	Owner	Lease company	Fin inst.	Prof firm
Base:	352	176	176	177	90	85	43	30	72	41	63	103
	%	%	%	%	%	%	%	%	%	%	%	%
More user-friendly website, better interface	25	28	23	23	23	32	26	37	26	29	21	22
Improve search function -multiple searches, search by owner, remove expired certs, download to PDF	9	7	11	12	4	7	5	7	4	10	5	17
Don't limit access to only 1 computer	8	8	7	10	3	7	12	3	8	-	13	7
Improve help desk - response time/ knowledge, 24/7, contact person, Montreal office inefficient	7	7	8	7	7	8	2	7	10	12	3	9
Allow multiple registrations/authorisations/revocations simultaneously	5	2	7	5	7	1	9	-	6	2	8	2
Speed up web response time - authorisations, approvals, searches	4	5	3	5	2	4	-	3	4	-	8	5
Reduce fees	3	5	2	2	1	8	-	7	3	12	-	3
E-mails should contain more relevant information	3	3	2	3	1	4	5	-	3	2	2	4
On-line user guide, tutorials, webinar, training course in far east	3	2	3	3	3	1	-	-	4	5	3	2
Consistently improve compatibility with internet browsers/computer software	3	3	2	3	2	1	-	3	7	-	2	2
Simplify PUE process requesting, granting or revoking authorisations	2	1	3	2	3	-	2	-	-	-	3	3
Simplify log in procedure	2	3	1	2	2	1	-	3	4	-	3	-
Payment flexibility, include visa, Mastercard, TT, cumulative/better invoicing	1	2	1	3	-	-	-	-	-	5	2	2
Faster registration of new entities, faster turnaround of registration requests	1	1	1	2	-	1	-	-	1	-	2	2
Renewals- speed up, simplify, longer notification	1	2	1	2	1	-	-	-	3	2	-	1
Allow more time for consent	1	1	1	2	-	-	2	-	-	-	-	2
Other	5	5	5	5	7	4	7	-	4	5	5	7
None, no comment, n/a,	30	28	31	23	40	33	35	33	32	34	29	24

Overall Satisfaction Ratings with the Registry



Reasons for Score

Base: All respondents scoring 9 to 10 n - 184



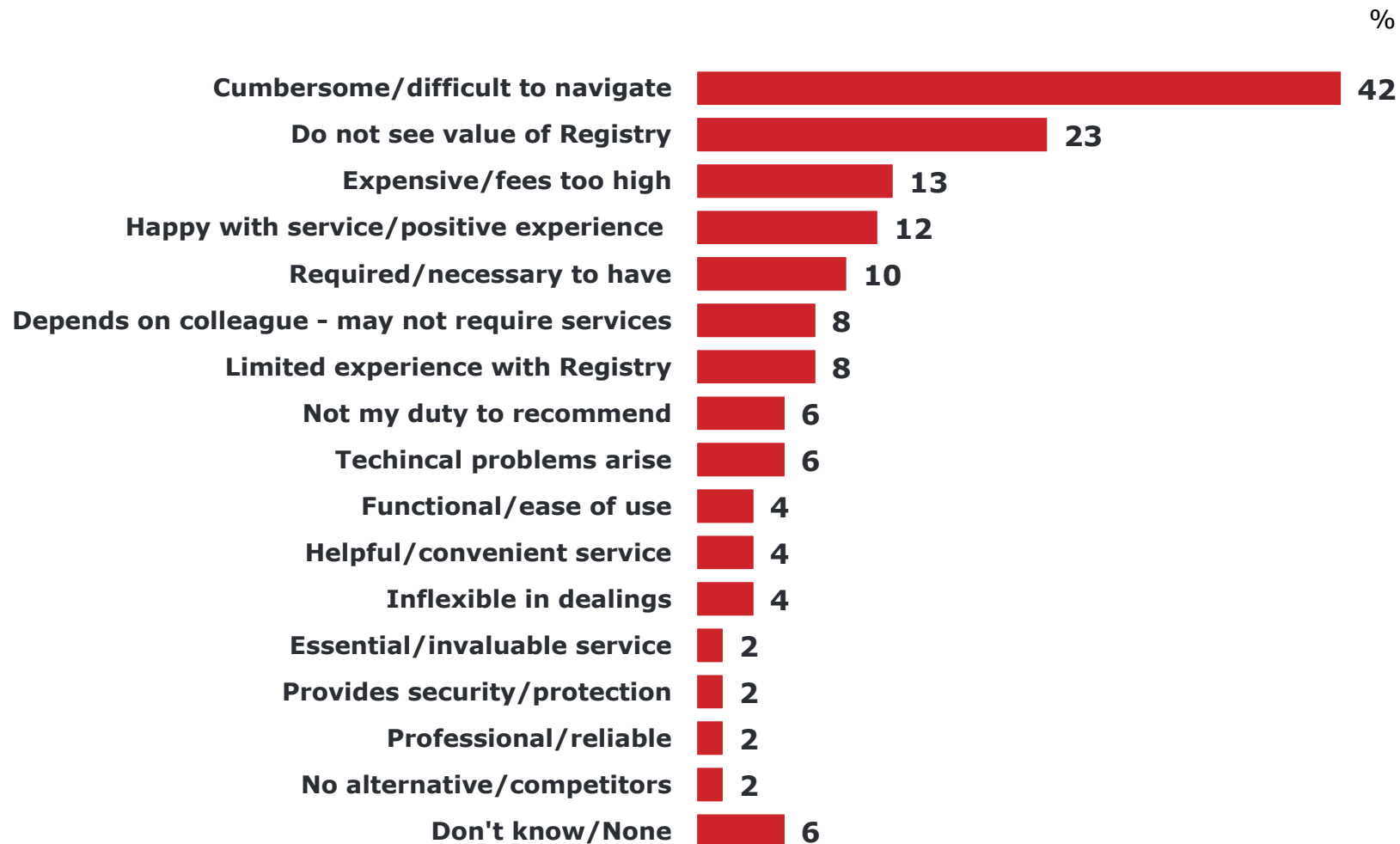
Reasons for Score

Base: All respondents scoring 7 to 8 n - 88



Reasons for Score

Base: All respondents scoring 1 to 6 n - 52



USA Versus Other Regions: Comparative Analysis

	2009		2010		2011		2012		2013		2014	
	USA	Other	USA	Other	USA	Other	USA	Other	USA	Other	USA	Other
The degree to which the functionality of the register fits with the way your business functions	6.2	7.07	6.62	6.91	7.07	7.21	7.29	6.99	7.46	7.45	7.59	7.89
Overall ease of use of the Registry	6.5	6.62	6.56	6.86	6.84	7.28	7	6.69	7.22	7.32	7.28	7.56
Level of fee charged	6.1	6.53	6.46	6.64	6.7	6.54	7.11	6.23	7.37	6.89	7.48	7.15
Speed of registry during use	7.1	7.16	7.1	7.34	7.79	7.63	7.8	7.22	7.91	7.89	8.18	8.13
Reliability of technical aspects of the Registry	7.2	7.19	7.19	7.58	7.93	7.83	8.05	7.33	7.9	7.67	8.24	8.33
Speed of approval for new administrators/users	7.8	8.15	8	8.31	8.37	8.12	8.31	7.95	8.44	8.27	8.33	8.50
Efficiency of resolution queries by Registry officials	7.5	7.89	7.82	7.8	8.1	7.99	8.37	8	8.44	8.44	8.54	8.71
Technical knowledge of registry staff regarding the Registry	7.9	7.87	8.25	8.05	8.55	8.16	8.54	8.11	8.55	8.61	8.77	8.61
Quality of information sent to you by the Registry Officials	7.9	8.09	8.1	8.15	8.38	8.22	8.46	8.01	8.56	8.36	8.78	8.66
Efficiency of credit card transactions	8.2	8.49	8.3	8.02	8.59	8.3	8.56	7.93	8.82	8.71	9.00	8.83
Availability of Registry Officials	7.2	7.86	7.44	8.11	8.17	7.95	8.09	7.91	8.35	8.43	8.54	8.59
Speed of refunds	6.7	6.72	7.01	7	8.13	8.15	7.99	7.3	8.22	8.09	8.37	8.40
Registry official's language skills	8.6	8.99	8.8	8.65	9.01	8.88	9	8.76	9.11	8.77	9.10	8.97
Efficiency of resolution queries by help desk staff	6	6.98	6.78	7.65	7.24	7.52	8.1	7.96	8.37	8.45	n/a	n/a
Technical knowledge of helpdesk staff regarding the Registry	6	7.18	6.86	7.81	7.65	7.55	8.17	7.98	8.43	8.41	n/a	n/a
Availability of helpdesk staff	7.1	7.17	7.21	8.12	7.6	7.66	8.2	8.1	8.32	8.5	n/a	n/a
Helpdesk staff language skills	7.9	8.17	8.27	8.6	8.53	8.56	8.93	8.77	9.01	8.76	n/a	n/a
Overall worth of the registry to my organisation/business	6.2	7.29	6.52	7.31	6.94	7.58	7.44	7.56	7.65	7.86	7.71	8.17



Summary



Summary

- The demographic and organisation type profile of the Registry user in 2014 is closely in line with that prevailing in previous years.
- With users evenly split by gender, and spread across all age groups from 18-34 yrs to 55 yrs+.
- Marginally more senior managers/partners emerge in the user base this year with fewer general administrative staff.
- The growth of the use of Facebook and Twitter has plateaued this year, with use of LinkedIn growing to a majority (53%) of users.
- Use of LinkedIn is particularly high in lease companies and amongst senior partner and legal users.
- The proportion of users based in the USA is now just over half of the total user base at 52%, with users in Canada rising to 10%.
- The fit of Registry functionality with business functionality remains the single most important definer of the perceived worth of the Register, followed by its Ease of Use and Fee Charged. The relative importance of all other factors remains reasonably consistent year-on-year.

Summary

- It was noted last year that historical data trends indicated that the overall experience rating had reached, or had all but reached, its peak. This analysis has come to pass, with a modest improvement in overall satisfaction, to a noteworthy high of 8.24.
- With an overall satisfaction rating of 8.0 extremely difficult to reach on any such survey.
- Last year it was noted that the perceived worth to business rating is likely to settle in at close to 7.7, and the indications are that there is very limited scope for further significant improvements over and above this year's 7.95 in future years.
- Just one service aspect has registered a significant year-on-year improvement – reliability of technical aspects.
- Satisfaction with all ten most important aspects has in fact improved to at least some degree since last year.
- With slight improvements in satisfaction on most 'second tier' aspects also.
- There is still some latitude for marginal improvements in terms of fees charged and ease of use of Registry.
- Notwithstanding the general improvements across the board.

Summary

- Users continue to request a more user-friendly/intuitive website, and improvements to the search function.
- Those particularly enamoured with the Registry cite its ease and efficiency of use, and its helpful/friendly staff as key drivers of satisfaction.
- Those scoring the Registry at a more modest 7-8 identify difficulties with use/navigation as a negative (23%), and also refer to the fact that they are obliged to use it as a reason for their muted response to it.
- Those rating the Registry at just 1-6 fail to recognise its value for the fee charged, and can also describe it as cumbersome to use.

Thank You



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