



INTERNATIONAL REGISTRY  
OF MOBILE ASSETS



# Aviareto User Survey

November 2018

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RESEARCH  
& INSIGHT



- 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, 2014, 2015, 2016, 2017 and 2018 with a view to assessing the state of play year on year.



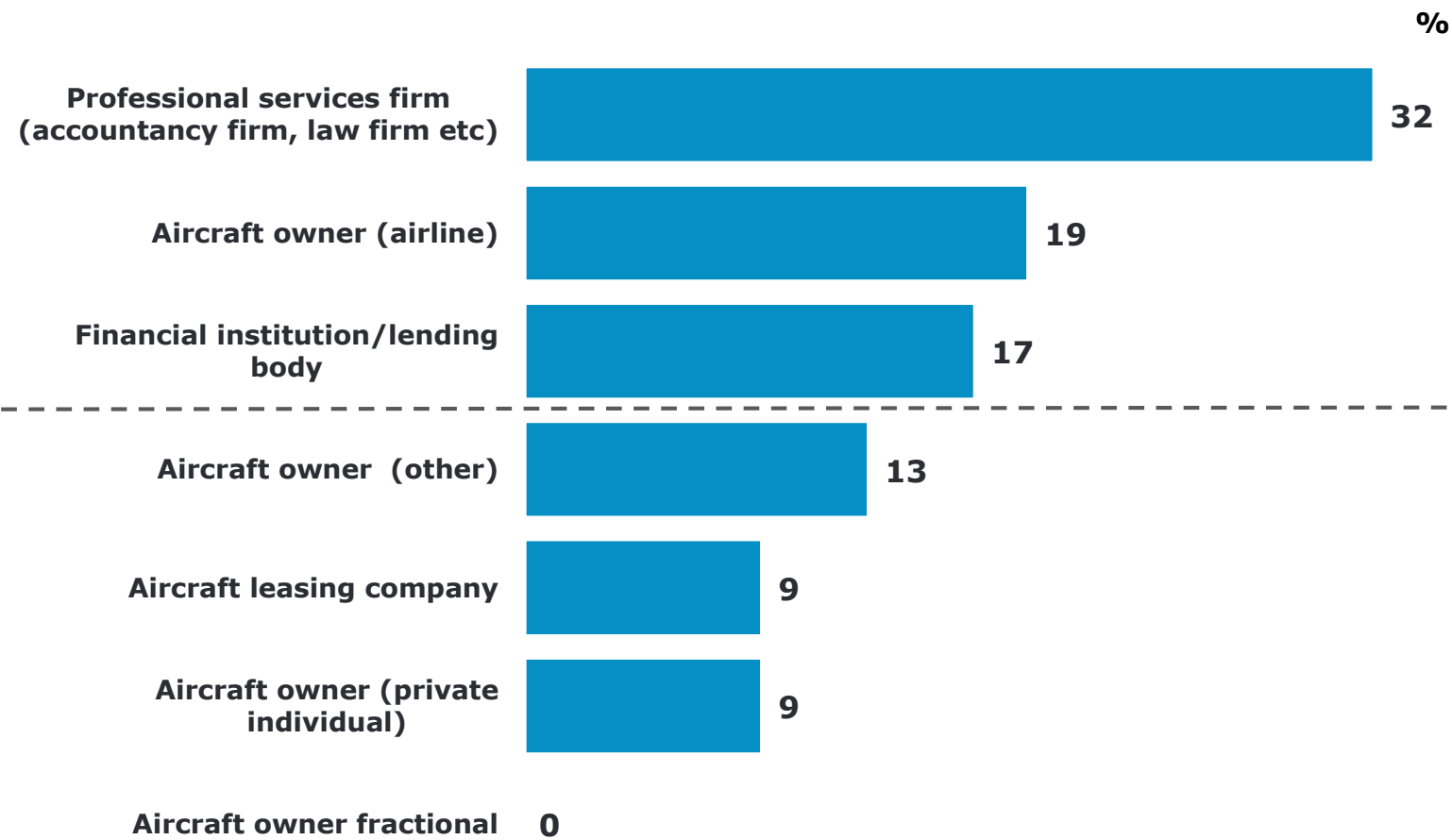
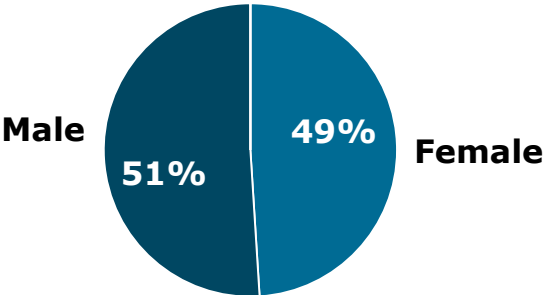
- Online survey of Registry users, by way of structured questionnaire.
- Potential respondents initially contacted by Aviareto, with survey rationale explained.
- Questionnaire mailed to total contact sample of 2731 users.
- Total achieved sample of 285 users (318 users in 2017, 335 users in 2016, 317 users in 2015, 352 users in 2014, 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 10.6% - 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 10<sup>th</sup> September – 2<sup>nd</sup> November, 2018. An incentive offered for the first time in 2009 (3 x draws for \$250 Amazon voucher), and each year since then.



# Sample Profile 2018

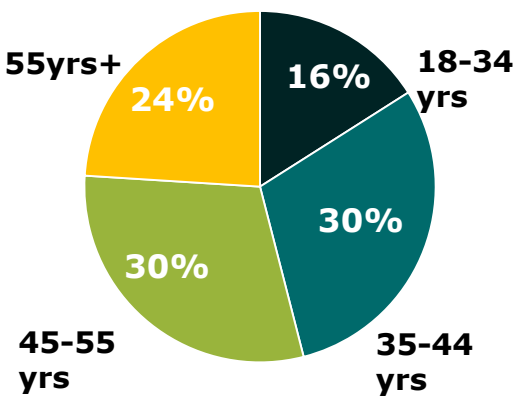


GENDER



\*0 = less than 1%

AGE

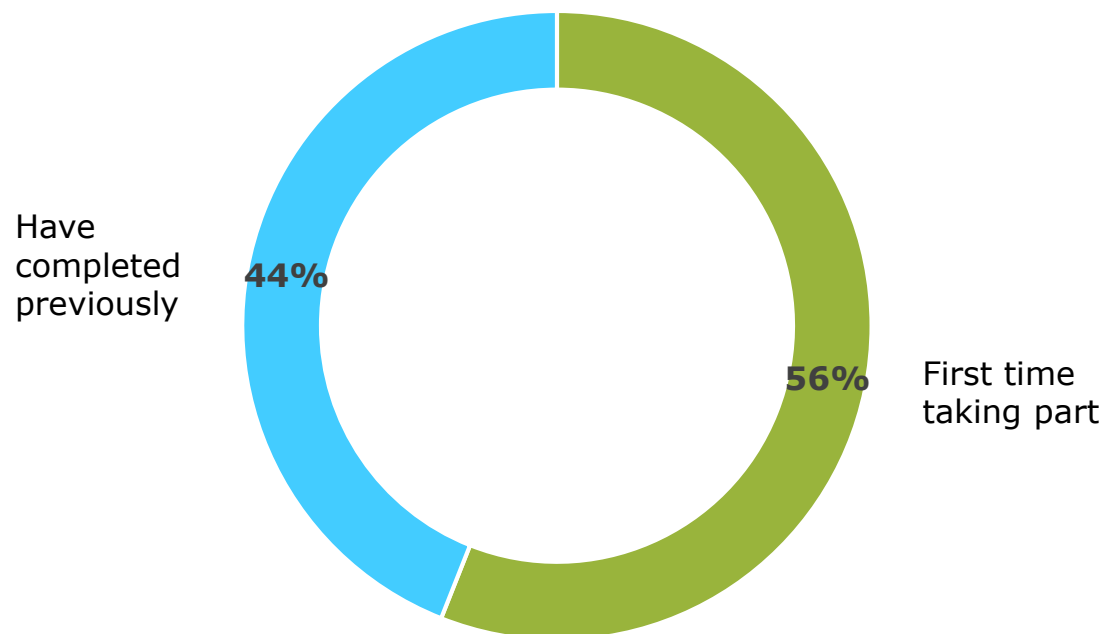


Three in ten of the user sample base is from professional services firms, with 41% aircraft owners of some type.



# Sample Profile 2018

Base: All users: 285



	Gender		Age			Organisation						And in what country are you yourself based?	
	Male	Female	18-44	45-54 yrs	55 yrs +	Airline	Private	Owner	Lease company	Fin inst.	Prof firm	United States (USA)	Others
UNWTD	145	140	131	86	68	55	25	38	27	48	92	107	178
	%	%	%	%	%	%	%	%	%	%	%	%	%
First time taking part	61	51	62	59	40	64	64	66	59	63	40	45	62
Have completed previously	39	49	38	41	60	36	36	34	41	38	60	55	38

**Just over half of respondents were first-time participants in the survey in 2018 – with these “first-timers” more likely to be male, younger (18-44 years) and located outside the U.S.**



**Q.** Is this the first time you have taken part in this survey or have you completed in previous year(s)?

# Sample Profile Comparison



		Previous Waves										
	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007
	%		%	%	%	%	%	%	%	%	%	%
Professional services firm	<b>32</b>	30	32	35	29	30	26	24	27	28	29	17
Aircraft owner (airline)	<b>19</b>	18	18	15	12	15	13	12	8	11	9	7
Financial/lending institution	<b>17</b>	18	14	16	18	17	20	23	21	19	17	17
Other aircraft owner	<b>13</b>	17	17	13	20	17	21	18	19	19	23	32
Aircraft leasing company	<b>9</b>	10	12	13	12	12	11	12	13	8	8	8
Aircraft owner (private individual)	<b>9</b>	7	7	8	9	8	8	10	10	13	14	18
Aircraft owner fractional	<b>0</b>	1	1	1	1	2	1	1	2	2	n/a	n/a

The profile of user type is in line with that of last year's sample.



Q. Analysis of Sample

# Sample Profile 2018

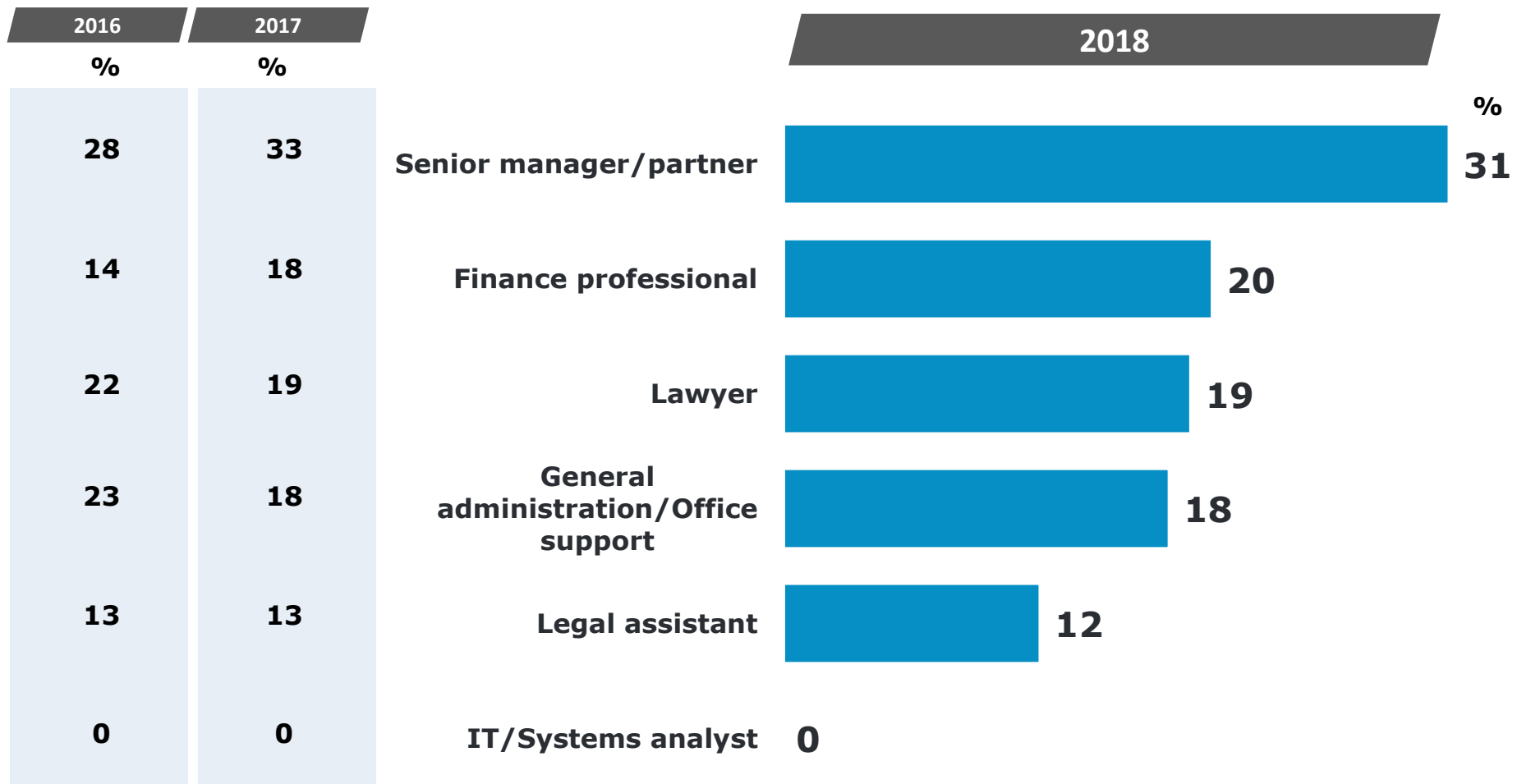


		Previous Waves										
	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007
Gender	%	%	%	%	%	%	%	%	%	%	%	%
Male	51	53	49	47	50	48	50	50	50	47	44	63
Female	49	47	51	53	50	52	50	50	50	53	55	37
Age	%	%	%	%	%	%	%	%	%	%	%	%
18-34	16	20	25	24	23	20	19	20	20	19	17	13
35-44	30	24	27	28	27	30	30	28	28	29	24	22
45-55	30	29	27	26	26	29	29	31	31	32	32	39
55+	24	27	20	22	24	21	22	22	22	21	26	26

**With users fairly evenly split by gender, 60% of the 2018 sample is aged 35-55 years, compared to 53% aged 35-55 years in 2017.**



# Sample Profile 2018



\*0 = less than 1%

The users' role in their organisation is very similar to that registered in 2017.





# Sample Profile 2018

## Social Media Usage



	Total							2018				
								Gender		Age		
	2018	2017	2016	2015	2014	2013	2012	Male	Female	18-44	45-54	55+
<b>Base:</b>	<b>285</b>	<b>318</b>	<b>335</b>	<b>317</b>	<b>352</b>	<b>345</b>	<b>349</b>	<b>145</b>	<b>140</b>	<b>131</b>	<b>86</b>	<b>68</b>
	%	%	%	%	%	%	%	%	%	%	%	%
Facebook	55	56	60	58	54	57	52	50	60	63	55	40
Linkedin	<b>55</b>	<b>57</b>	<b>59</b>	54	53	48	43	54	55	54	58	51
Twitter	<b>17</b>	<b>20</b>	<b>19</b>	16	16	18	16	16	19	18	12	22
Other	10	8	9	5	6	4	4	9	11	11	12	6
None	21	22	20	20	24	27	32	26	15	13	21	35
<b>Any Facebook/Linkedin</b>	<b>76</b>	<b>75</b>	<b>77</b>	<b>79</b>	<b>73</b>	<b>70</b>	<b>66</b>	70	83	82	77	65
<b>Any Facebook/LinkedIn/Twitter</b>	<b>79</b>	<b>78</b>	<b>80</b>	<b>80</b>	<b>76</b>	<b>73</b>	<b>68</b>	74	85	87	79	65

Use of social media has remained relatively flat, albeit high, since 2016.



Q. Analysis of Sample

# Sample Profile 2018

## Social Media Usage



	Total	Organisation						Role in the organisation			
		Airline owners	Private owners	Other Owner	Lease company	Fin inst.	Prof firm	Senior manager /partner	Law	Finance professional	General
<b>Base:</b>	<b>285</b>	<b>55</b>	<b>25</b>	<b>38</b>	<b>27</b>	<b>48</b>	<b>92</b>	<b>88</b>	<b>89</b>	<b>56</b>	<b>52</b>
	%	%	%	%	%	%	%	%	%	%	%
Facebook	55	55	52	55	52	63	52	47	52	59	69
Linkedin	55	62	40	42	81	48	55	64	55	59	35
Twitter	17	16	8	21	33	15	15	13	18	20	21
Other	10	9	8	5	15	10	12	8	11	11	12
None	21	22	24	32	7	23	17	23	19	20	21

**Use of LinkedIn is particularly high amongst airline owners, lease companies, senior partners/managers, and finance professionals.**



# Sample Profile 2018

## Frequency of Usage



	Total		Gender		Age			Organisation						Role in the organisation			
	2018	2017	Male	Female	18-44	45-54 yrs	55 yrs +	Airline owners	Private owners	Other Owner	Lease company	Fin inst.	Prof firm	Senior manager/partner	Law	Finance professional	General
<b>Base:</b>	<b>285</b>	<b>318</b>	<b>145</b>	<b>140</b>	<b>131</b>	<b>86</b>	<b>68</b>	<b>55</b>	<b>25</b>	<b>38</b>	<b>27</b>	<b>48</b>	<b>92</b>	<b>88</b>	<b>89</b>	<b>56</b>	<b>52</b>
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Never	-	2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Once a year	33	35	40	26	29	31	43	29	92	55	19	29	16	44	17	32	42
Once a month	39	35	43	34	41	41	32	58	8	34	44	44	34	38	46	46	21
Once a week	15	16	10	19	18	17	6	11	-	8	26	17	20	8	22	14	13
Once a day	5	4	4	6	5	3	9	2	-	3	7	10	7	3	4	5	10
More than once a day	8	8	2	14	8	7	10	-	-	-	4	-	24	7	10	2	13

**13% of all Registry users use the system at least once a day, with 67% accessing it at least once a month. This monthly+ figure is higher than the 63% recorded in last year's sample, and back up to the 2016 monthly plus usage level of 66%.**



Q. Finally, how often do you use the International Registry system?

# Sample Profile 2018



COUNTRY		2017	
		%	%
United States (USA)		39	41
United Kingdom		9	9
Canada		9	12
Ireland {Republic}		6	3
Mexico		3	3
New Zealand		3	3
United Arab Emirates		3	2
Australia		2	3
China		2	3
France		2	1
Germany		2	1
Japan		2	3
Luxembourg		2	2
Spain		2	2
Brazil		1	1
India		1	1
Indonesia		1	0
Italy		1	1
Kenya		1	1
Malaysia		1	1
Romania		1	-
Russian Federation		1	1
Singapore		1	1
South Africa		1	1
Sweden		1	1
(All other mentions less than 1% for total)			

US STATES (USA respondents – 110)			2017
		%	%
Oklahoma	<div><div></div></div> 19		16
California	<div><div></div></div> 12		8
Florida	<div><div></div></div> 7		6
Texas	<div><div></div></div> 7		8
Illinois	<div><div></div></div> 6		4
Kansas	<div><div></div></div> 4		3
New York	<div><div></div></div> 4		5
Washington	<div><div></div></div> 4		2
Minnesota	<div><div></div></div> 3		2
Missouri	<div><div></div></div> 3		3
Oregon	<div><div></div></div> 3		1
Alabama	<div><div></div></div> 2		2
Arizona	<div><div></div></div> 2		2
Connecticut	<div><div></div></div> 2		5
Georgia	<div><div></div></div> 2		2
Indiana	<div><div></div></div> 2		3
Louisiana	<div><div></div></div> 2		1
Massachusetts	<div><div></div></div> 2		2
New Jersey	<div><div></div></div> 2		1
Utah	<div><div></div></div> 2		2
Alaska	<div><div></div></div> 1		1
Arkansas	<div><div></div></div> 1		1
Colorado	<div><div></div></div> 1		2
Delaware	<div><div></div></div> 1		-
Idaho	<div><div></div></div> 1		2
Iowa	<div><div></div></div> 1		1
Montana	<div><div></div></div> 1		1
Nevada	<div><div></div></div> 1		2
Ohio	<div><div></div></div> 1		2
Pennsylvania	<div><div></div></div> 1		3
Tennessee	<div><div></div></div> 1		2
Virginia	<div><div></div></div> 1		1
Wisconsin	<div><div></div></div> 1		-
Wyoming	<div><div></div></div> 1		-

In 2016 there had been a year-on-year drop in the proportion of users based in the USA, compared to the year before (from 49% to 44%) and again from 44% to 41% between 2016 and 2017. This year, that trend continues, with 39% of 2018 respondents based in the USA.

# Key Service Aspects: Relative Contribution Towards Worth Of Registry To Business (Pearson's Correlations) 2018



2017 2016 2015 2014 2013 2012 2011 2010 2009 2008 2007

Fit of Registry and business functionality	0.77	0.79	0.81	0.71	0.78	0.75	0.81	0.76	0.78	0.83	0.8	n/a
Overall ease of use of the Registry	0.69	0.68	0.68	0.62	0.7	0.64	0.73	0.64	0.73	0.67	0.67	0.71
Reliability of technical aspects of the Registry	0.65	0.47	0.60	0.42	0.58	0.56	0.64	0.5	0.64	0.58	0.52	0.59
Quality of information sent to you from the Registry Officials	0.62	0.55	0.45	0.46	0.51	0.59	0.56	0.55	0.62	0.57	0.52	0.56
Speed of Registry during use.	0.61	0.56	0.45	0.41	0.6	0.54	0.62	0.45	0.59	0.56	0.56	0.57
Level of fee charged	0.60	0.65	0.56	0.49	0.62	0.63	0.65	0.6	0.69	0.74	0.7	0.67
Speed of refunds	0.56	0.50	0.56	0.43	0.47	0.57	0.66	0.39	0.51	0.56	0.48	0.47
Registry Officials' language skills	0.50	0.45	0.31	0.37	0.42	0.49	0.49	0.42	0.44	0.36	0.35	0.36
Efficiency of credit card transactions.	0.50	0.50	0.35	0.43	0.5	0.5	0.49	0.37	0.45	0.5	0.42	0.37
Technical knowledge of Registry Officials regarding the Registry.	0.49	0.53	0.46	0.35	0.52	0.57	0.47					
Speed of approval for new Administrators/Users	0.44	0.57	0.41	0.40	0.55	0.48	0.64	0.42	0.53	0.45	0.59	0.49
Availability of Registry Officials	0.43	0.58	0.57	0.41	0.5	0.6	0.64	0.55	0.51	0.38	0.52	0.55
Efficiency of resolution of queries by Registry Officials	0.43	0.54	0.56	0.44	0.55	0.57	0.56	0.44	0.61	0.49	0.6	0.58

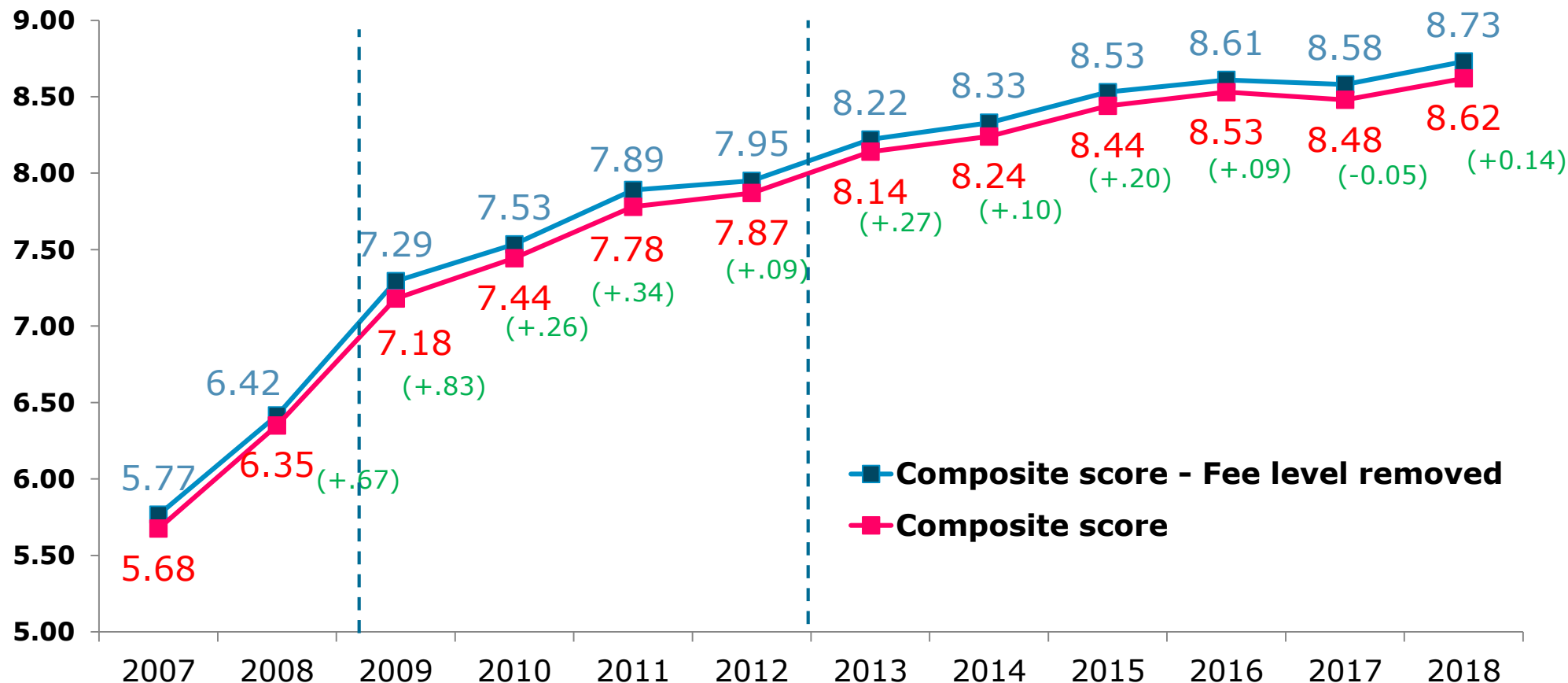
As has been the case since the outset, the fit of Registry with business functionality remains the single most important definer of the perceived worth of the Registry, followed by its ease of use. Reliability of technical aspects of the registry has increased in importance this year.



Q.1

Firstly, please rate the Registry on each of the following features on a scale of one to ten, where ten means you think it is completely satisfactory and one means it is completely unsatisfactory.

# Overall Weighted Registry Experience Rating



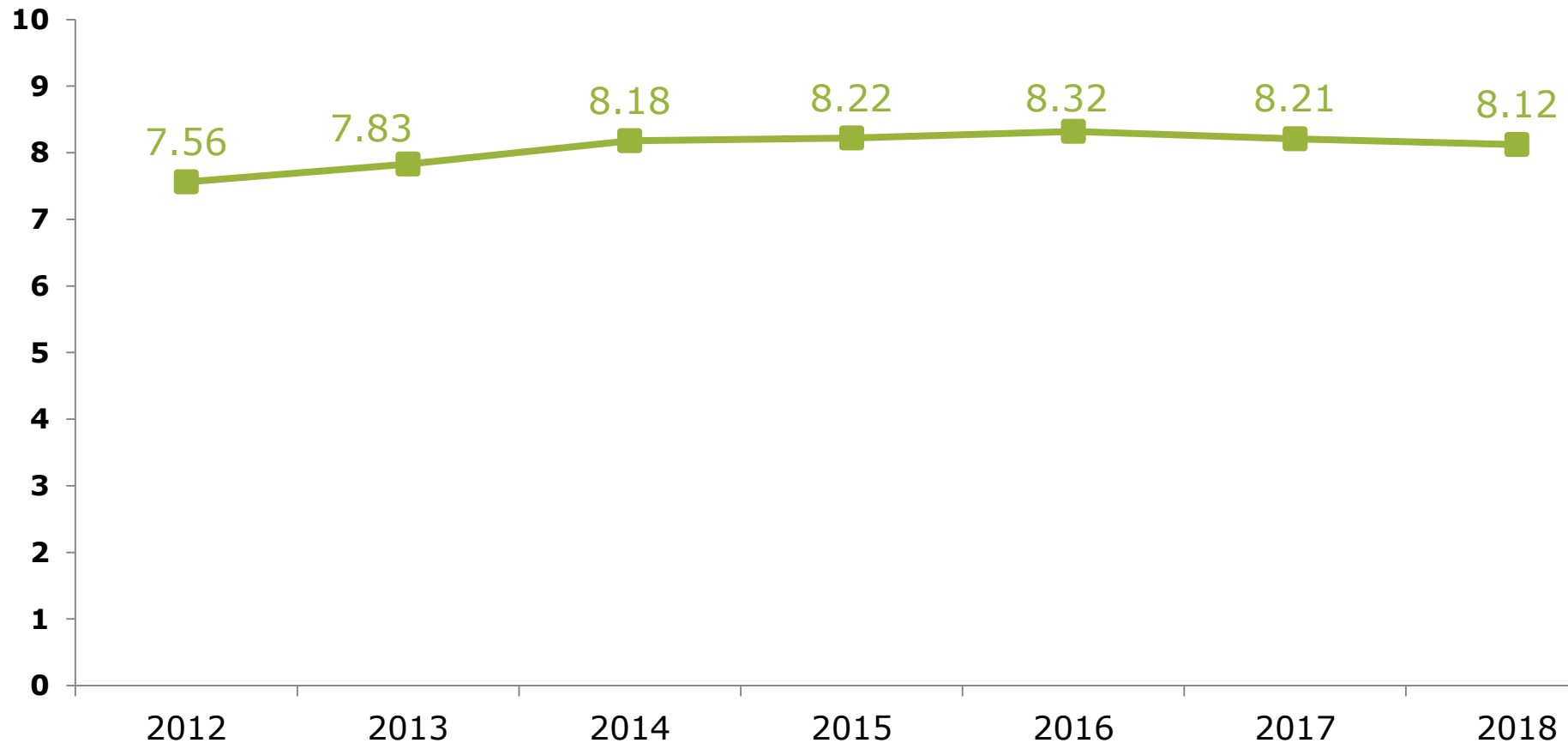
The overall weighted Registry experience rating has inched up this year to a remarkably high score of 8.73 out of a possible 10. As has been noted on previous surveys, this is an extremely high score for any B2B service, most of which struggle to reach the 8.0 mark.



**Q.1**

Firstly, please rate the Registry on each of the following features on a scale of one to ten, where ten means you think it is completely satisfactory and one means it is completely unsatisfactory.

# Overall Satisfaction with the Registry - Summary

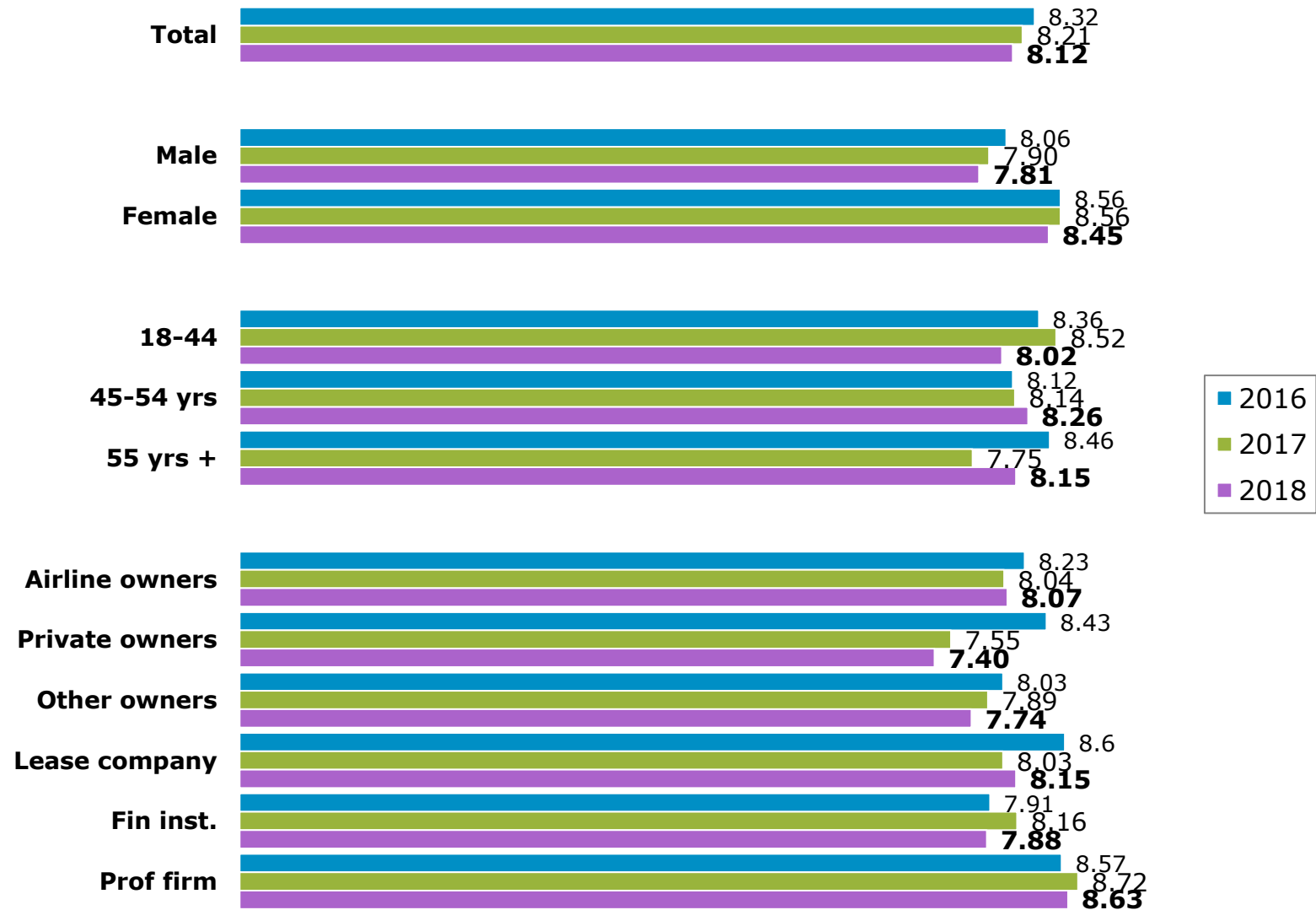


**The Registry's overall satisfaction rating also continues to exceed 8 out of 10.**



Q.3 And taking everything into account, how would you rate your overall satisfaction with the Registry?

# Overall Satisfaction with the Registry x Demographics



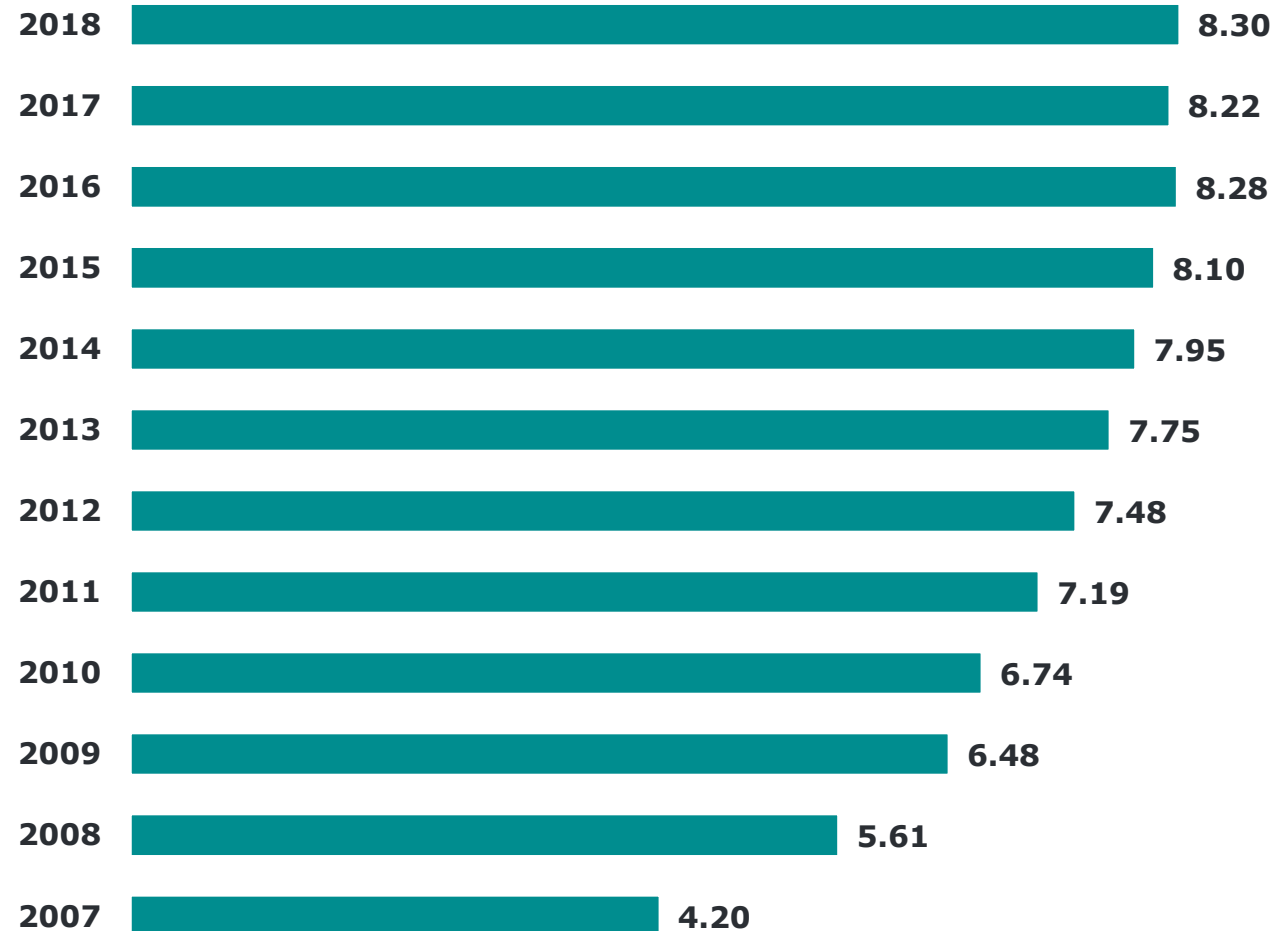
This rating has actually improved somewhat amongst older (45+ years) users, and those working in lease companies.



Q.3 And taking everything into account, how would you rate your overall satisfaction with the Registry?



# Overall worth of registry to business: Ten point Rating Scale



**The perceived worth of the Registry to users business remains extremely high – with limited scope for further significant improvements beyond 8.3 out of 10.**



**Q.1**

Firstly, please rate the Registry on each of the following features on a scale of one to ten, where ten means you think it is completely satisfactory and one means it is completely unsatisfactory.

# Key Service Aspects:

## Overall Performance Rating (10 Point Scale)



Most Important ↓	Mean Performance Rating									
	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009
The degree to which the functionality of the Registry fits with the way your business functions.	8.12	7.94	8.06	7.88	7.75	7.46	7.18	7.12	6.7	6.42
Overall ease of use of the Registry.	7.80	7.73	8.00	7.88	7.43	7.26	6.89	7.01	6.64	6.52
Reliability of technical aspects of the Registry.	8.38	8.23	8.46	8.42	8.28	7.79	7.79	7.89	7.3	7.22
Quality of information sent to you from the Registry Officials	8.99	8.99	8.98	8.84	8.72	8.47	8.29	8.32	8.11	7.93
Speed of Registry during use.	8.26	8.20	8.31	8.23	8.16	7.9	7.59	7.73	7.17	7.1
Level of fee charged.	7.59	7.42	7.65	7.48	7.31	7.15	6.79	6.64	5.51	6.18
Speed of refunds	8.83	8.56	8.52	8.42	8.39	8.17	7.74	8.14	7.01	6.69
Registry Officials' language skills	9.27	9.24	9.27	9.25	9.04	8.95	8.91	8.96	8.76	8.73
Efficiency of credit card transactions.	8.88	9.02	9.06	9.04	8.91	8.77	8.32	8.48	8.22	8.28
Technical knowledge of Registry Officials regarding the Registry	9.01	8.92	8.95	8.91	8.69	8.57	8.38	8.4	8.2	7.86
Speed of approval for new Administrators/Users	8.98	8.93	8.91	8.64	8.42	8.36	8.17	8.27	8.09	7.92
Availability of Registry Officials	8.86	8.95	8.95	8.86	8.57	8.38	8.02	8.08	7.64	7.41
Efficiency of resolution of queries by Registry Officials	9.11	8.95	8.93	8.88	8.63	8.44	8.23	8.06	7.82	7.61

**Performance satisfaction has improved most notably in relation to speed of refunds, registry/business function fit, fees charged, resolution of queries, and reliability of technical aspects.**

- Significant increase: 2018-2017
- Significant decrease: 2017-2016
- Significant increase: 2016-2015

# Key Service Aspects:

## Overall Performance Rating (10 Point Scale)

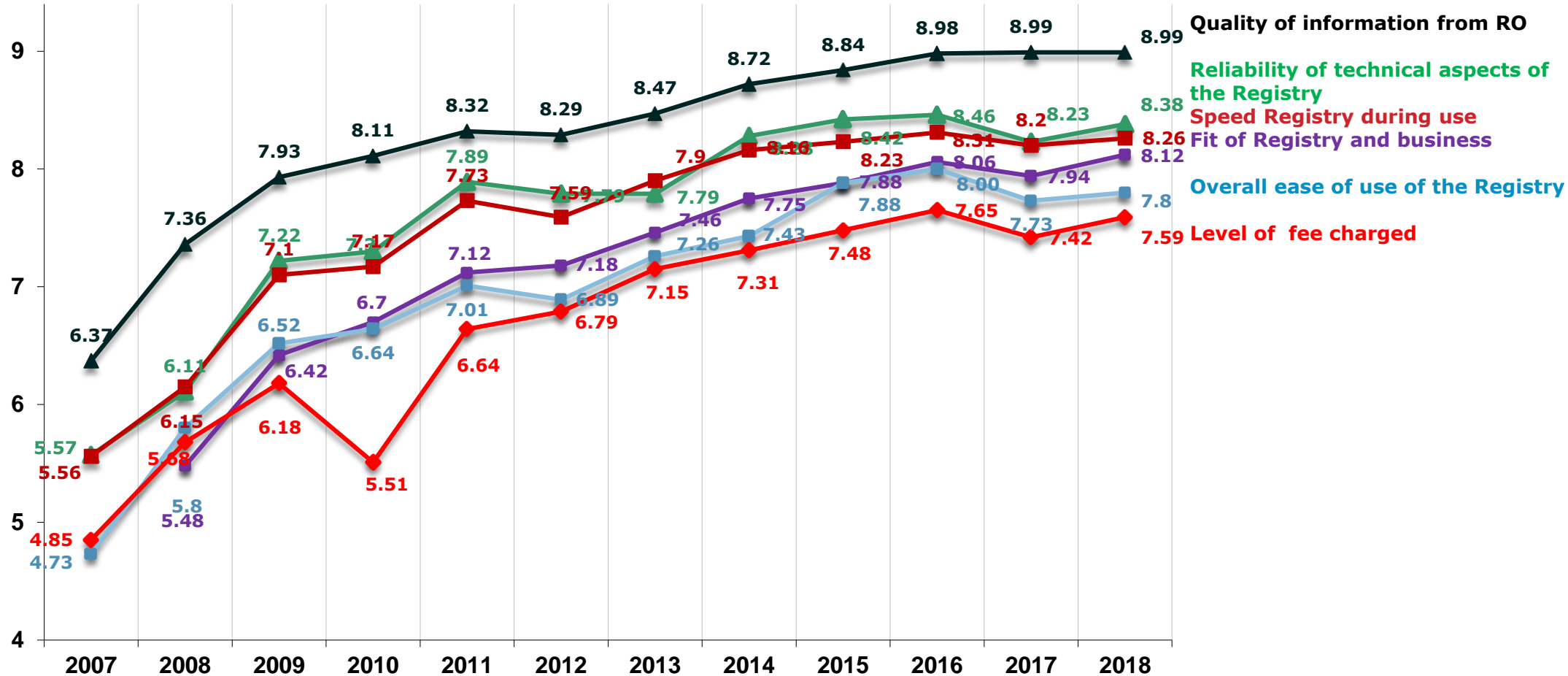


	Mean Performance Rating					% Scoring 1-2					% Scoring 9-10					% of No Opinion					YOY CHANGE 2018 vs 2017
	2018	2017	2016	2015	2014	2018	2017	2016	2015	2014	2018	2017	2016	2015	2014	2018	2017	2016	2015	2014	
<b>MOST IMPORTANT</b>																					
Fit of Registry and business functionality	8.12	7.94	8.06	7.88	7.75	2	6	5	2	3	52	51	49	46	41	2	5	2	5	5	+0.18
Overall ease of use of the Registry	7.80	7.73	8	7.88	7.43	4	6	2	3	5	44	45	47	45	37	-	1	1	1	1	+0.07
Reliability of technical aspects of the Registry	8.38	8.23	8.46	8.42	8.28	2	2	2	1	1	54	48	53	54	45	7	9	9	8	12	+0.15
Quality of information sent to you by the Registry Officials	8.99	8.99	8.98	8.84	8.72	0	1	1	1	1	71	68	71	67	61	2	7	4	3	5	0.00
Speed of registry during use	8.26	8.2	8.31	8.23	8.16	3	3	3	1	2	55	52	53	52	48	0	1	1	2	2	+0.06
Level of fee charged	7.59	7.42	7.65	7.48	7.31	2	4	2	2	5	37	33	36	33	33	6	9	6	7	5	+0.17
Speed of refunds	8.83	8.56	8.52	8.42	8.39	0	0	0	0	1	34	19	20	20	19	49	67	69	65	64	+0.27
Registry Officials language skills	9.27	9.24	9.27	9.25	9.04	0	0	0	0	0	75	70	72	75	66	9	14	14	10	11	+0.03
Efficiency of credit card transactions	8.88	9.02	9.06	9.04	8.91	1	1	0	1	1	67	71	70	69	64	7	9	8	10	9	-0.14
Technical knowledge of Registry Officials regarding the Registry	9.01	8.92	8.95	8.91	8.69	2	0	0	0	1	70	63	63	66	58	6	12	11	6	11	+0.09
Speed of approval for new Administrators/Users	8.98	8.93	8.91	8.64	8.42	0	0	0	1	2	66	59	65	56	50	9	16	10	12	14	+0.05
Availability of Registry Officials	8.86	8.95	8.95	8.86	8.57	2	0	0	0	1	71	65	67	68	58	5	8	7	5	7	-0.09
Efficiency of resolution of queries by Registry Officials	9.11	8.95	8.93	8.88	8.63	1	0	0	0	2	74	68	68	66	59	6	8	6	4	6	+0.16
<b>LEAST IMPORTANT</b>																					

Overall, levels of satisfaction with all aspects remain very high – with the vast majority of them either at, or above 8.0 out of a possible 10.

# Key Service Aspects:

## Overall Performance Rating (Ten Point Scale) – Top 6 Criteria

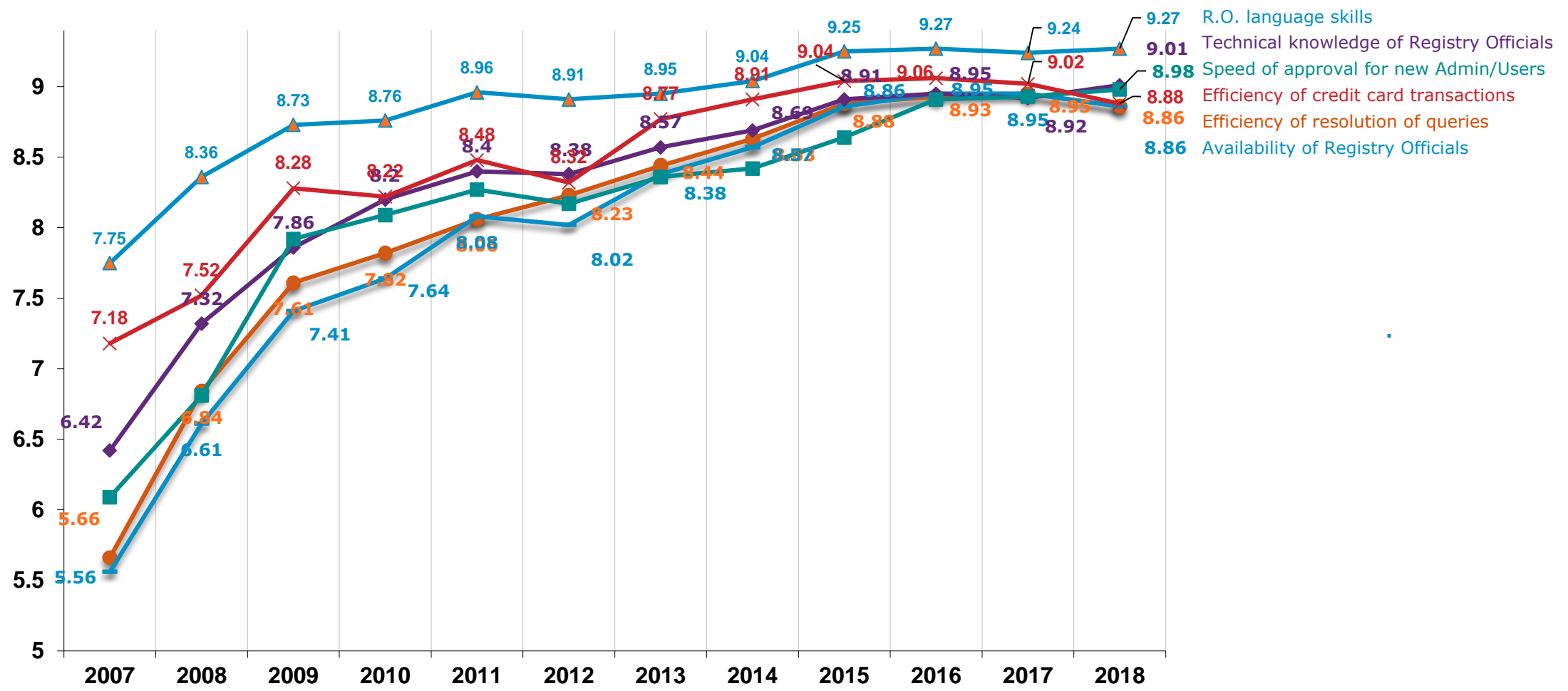


Note the marginal satisfaction increases with 5 of the Top 6 criteria.

# Key Service Aspects:

## Overall Performance Rating (Ten Point Scale) – Remaining Aspects

B&A



Satisfaction with each of the remaining aspects approaches or exceeds 9 out of 10.

# Satisfaction With The Registry x Key User Groupings



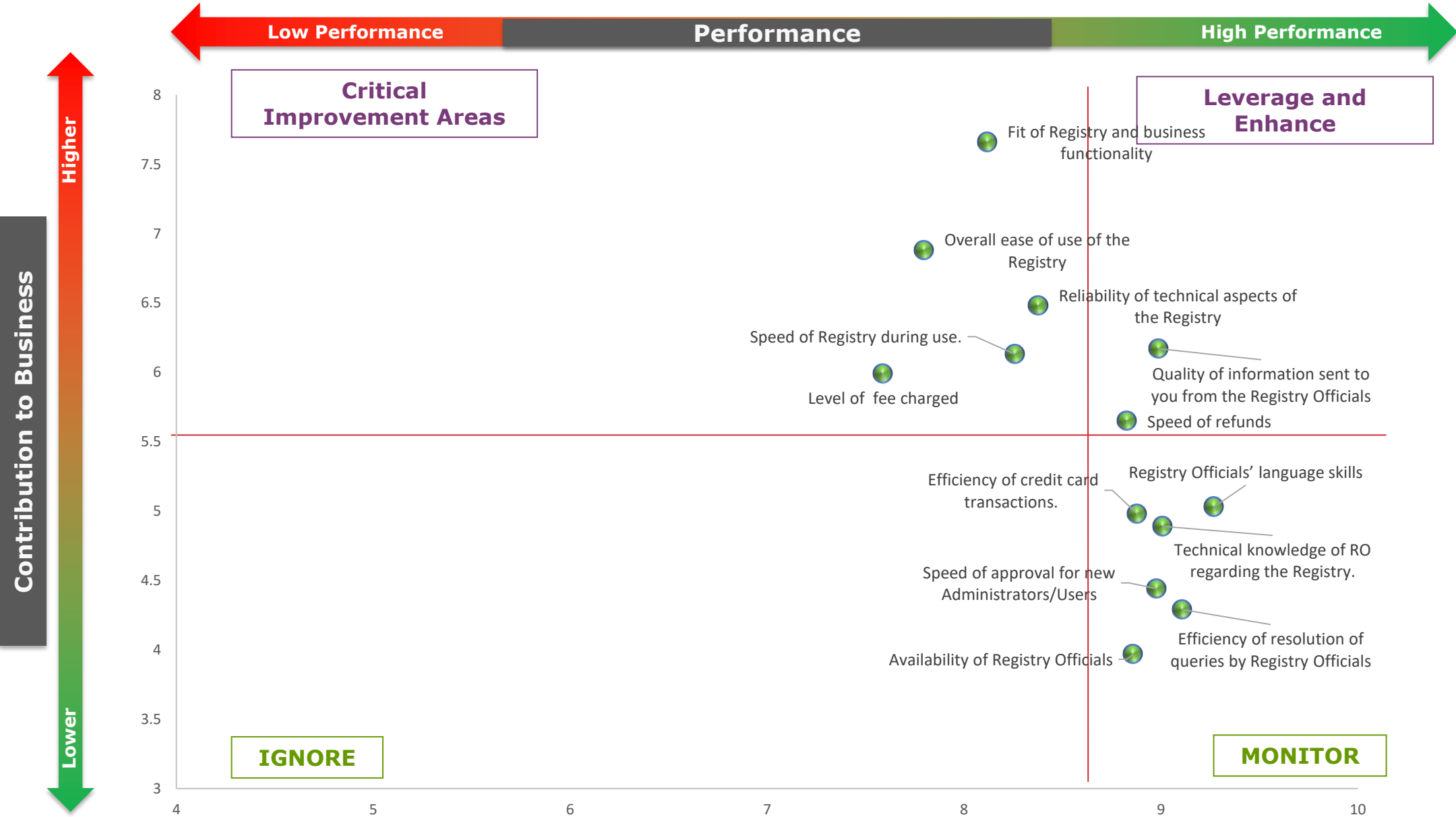
## Ten Point Rating Scale

	Total	Gender		Age			Organisation					
		Male	Female	18-44	45-54 yrs	55 yrs +	Airline owners	Private owners	Other Owner	Lease company	Fin inst.	Prof firm
Fit of Registry and business functionality	8.12	7.78	8.46	8.04	8.29	8.03	8.15	7.61	7.75	8.35	7.77	8.48
Overall ease of use of the Registry	7.80	7.36	8.26	7.77	7.90	7.75	7.84	7.04	7.50	7.56	7.90	8.14
Reliability of technical aspects of the Registry	8.38	8.23	8.54	8.25	8.65	8.33	8.58	8.24	8.12	8.56	8.18	8.46
Quality of information sent to you by the Registry Officials	8.99	8.81	9.17	8.89	9.11	9.05	9.02	8.71	8.97	8.78	8.85	9.20
Speed of registry during use	8.26	8.01	8.51	8.08	8.39	8.44	8.04	7.64	8.26	8.22	8.19	8.60
Level of fee charged	7.59	7.31	7.89	7.44	7.80	7.60	7.17	7.61	7.29	7.04	7.53	8.16
Speed of refunds	8.83	8.58	9.07	8.60	8.91	9.19	8.87	8.45	8.64	9.19	8.48	8.98
Registry Officials language skills	9.27	9.13	9.41	9.06	9.53	9.36	9.00	9.41	9.17	9.13	9.16	9.53
Efficiency of credit card transactions	8.88	8.68	9.09	8.72	9.05	8.97	8.79	8.39	8.71	9.23	8.57	9.19
Technical knowledge of Registry Officials regarding the Registry	9.01	8.83	9.20	8.90	9.06	9.20	9.04	8.67	8.85	8.96	9.02	9.17
Speed of approval for new Administrators/Users	8.98	8.83	9.12	8.70	9.04	9.45	9.08	8.67	8.97	9.04	8.89	9.02
Availability of Registry Officials	8.86	8.67	9.05	8.63	9.14	8.97	9.06	8.48	8.77	8.73	8.80	8.96
Efficiency of resolution of queries by Registry Officials	9.11	8.99	9.23	8.92	9.31	9.25	9.15	9.36	8.83	9.04	8.93	9.25
<b>Overall worth of the Registry to my organisation/business.</b>	<b>8.30</b>	<b>7.88</b>	<b>8.72</b>	<b>8.41</b>	<b>8.43</b>	<b>7.91</b>	<b>8.19</b>	<b>7.16</b>	<b>7.81</b>	<b>8.69</b>	<b>8.40</b>	<b>8.70</b>

**In general, satisfaction is highest amongst females and users aged 45 to 54 years, as well as amongst professional firms, lease companies and airline owners.**

# Aviareto: Strategic Performance Matrix 2018

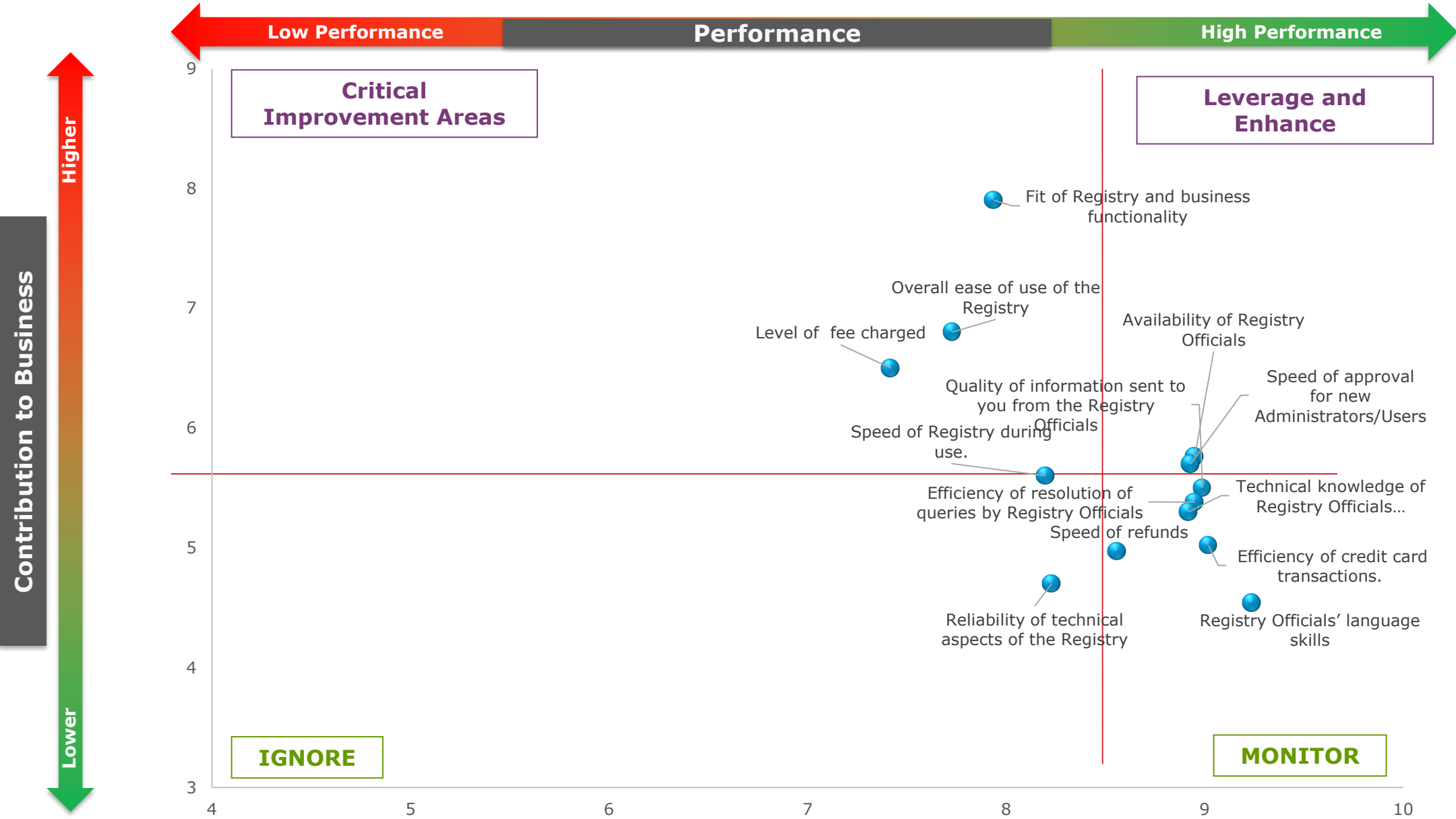
Base: All users



By this stage of the research programme, there are very few aspects of service which require critical or remedial attention.

# Aviareto: Strategic Performance Matrix 2017

Base: All users



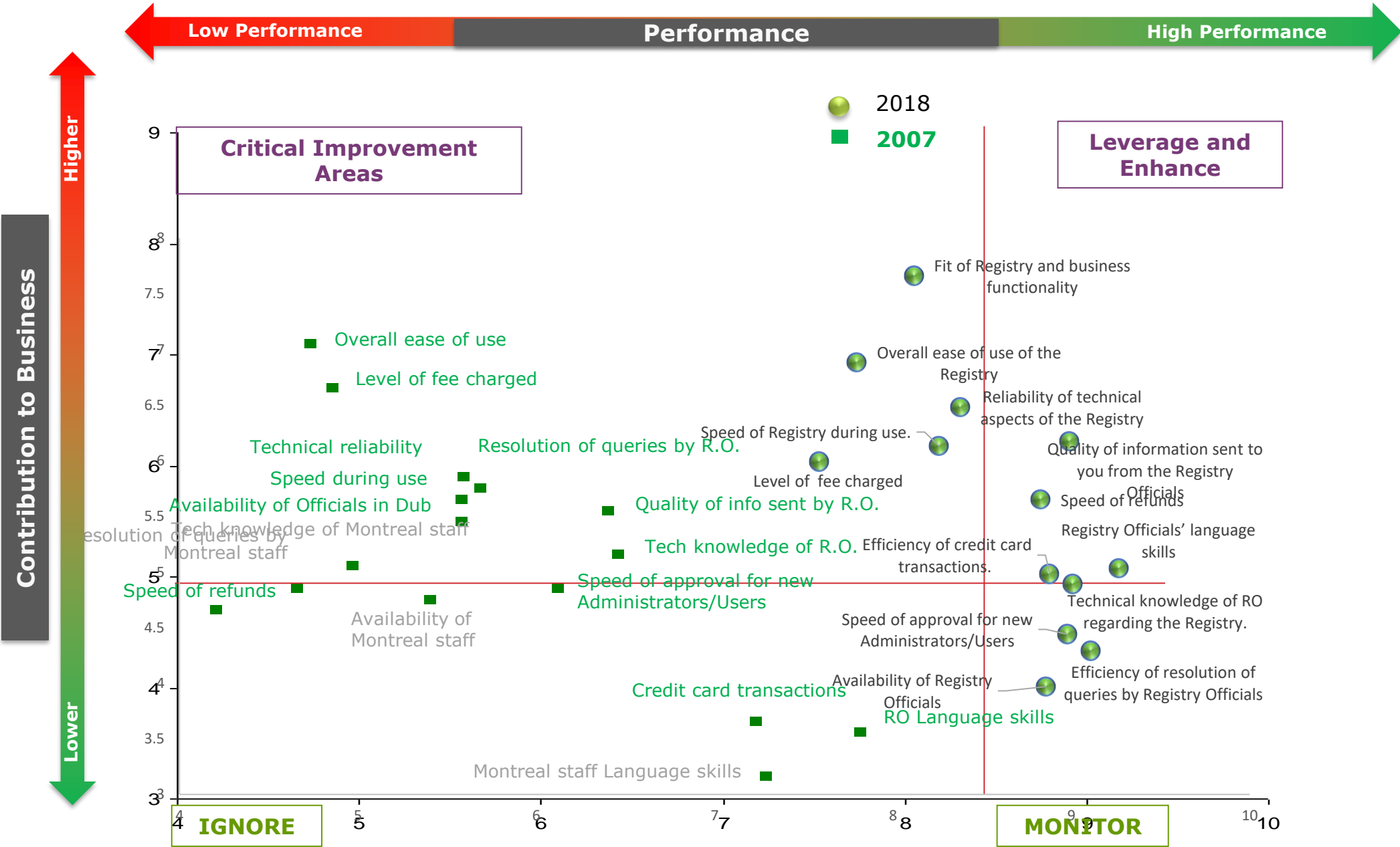
The broad pattern of strategic performance for the Registry is very similar in 2018 to that which prevailed in 2017.





# Aviareto: Strategic Performance Matrix 2018 vs 2007

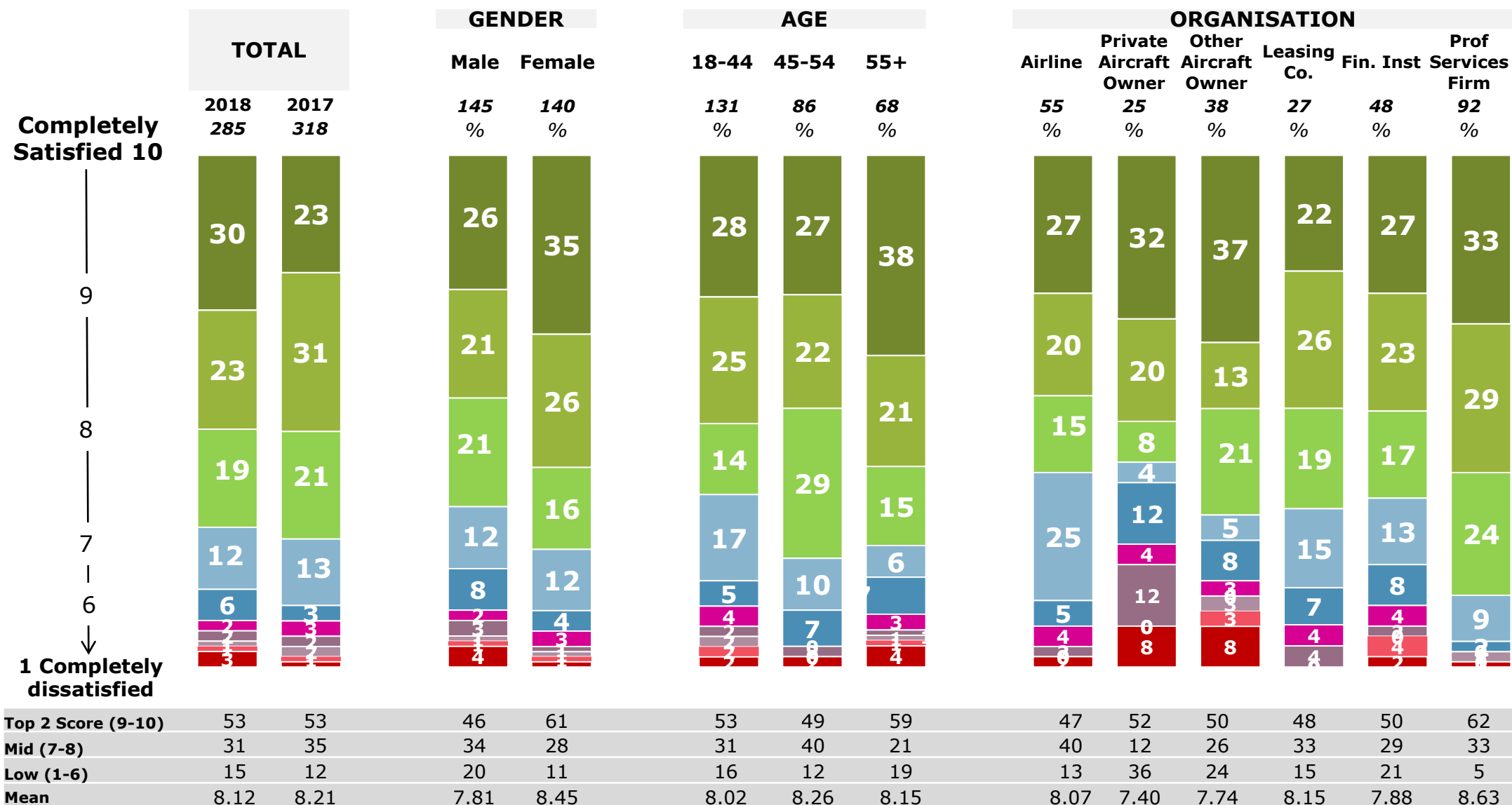
Base: All users



In superimposing the 2018 data on the original 2007 strategic performance map, we can see the extraordinary extent of the user improvements made over the last 12 years.



# Overall Satisfaction Ratings with the Registry



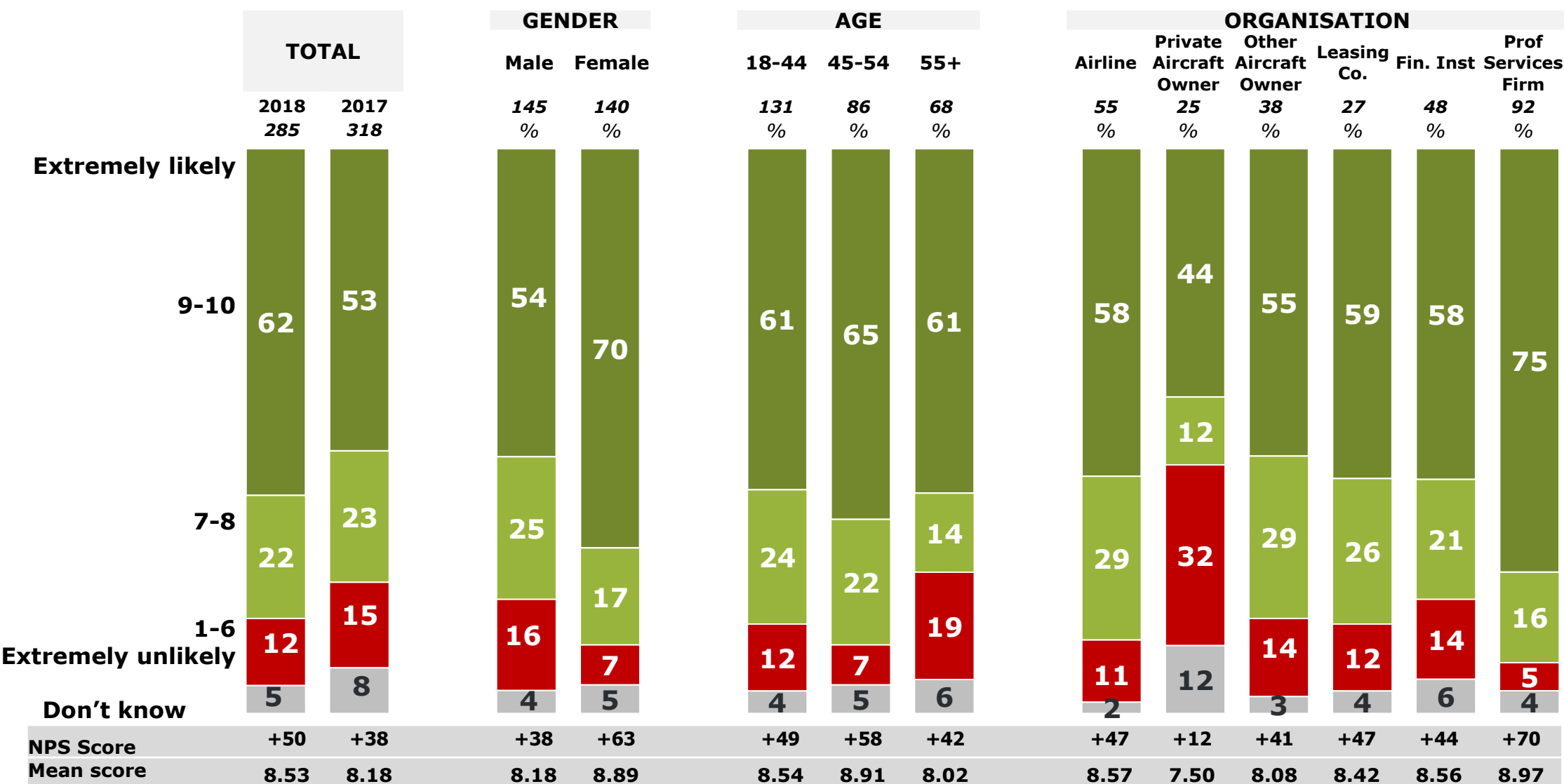
**Overall satisfaction with the Registry, in keeping with general survey results, remains at over 8 out of 10 with greatest satisfaction amongst professional services firms, leasing companies and airlines.**



**Q.2**

Taking everything into account, how would you rate your overall satisfaction with the Registry on a scale of one to ten where 10 means that you think it is completely satisfactory, and 1 means it is completely unsatisfactory.

# Likelihood to Recommend Registry



The Registry Net Promoter Score (NPS) has increased to a very high +50. The NPS score stands at a remarkable +70 amongst professional services firm users - up 10 points since 2017.



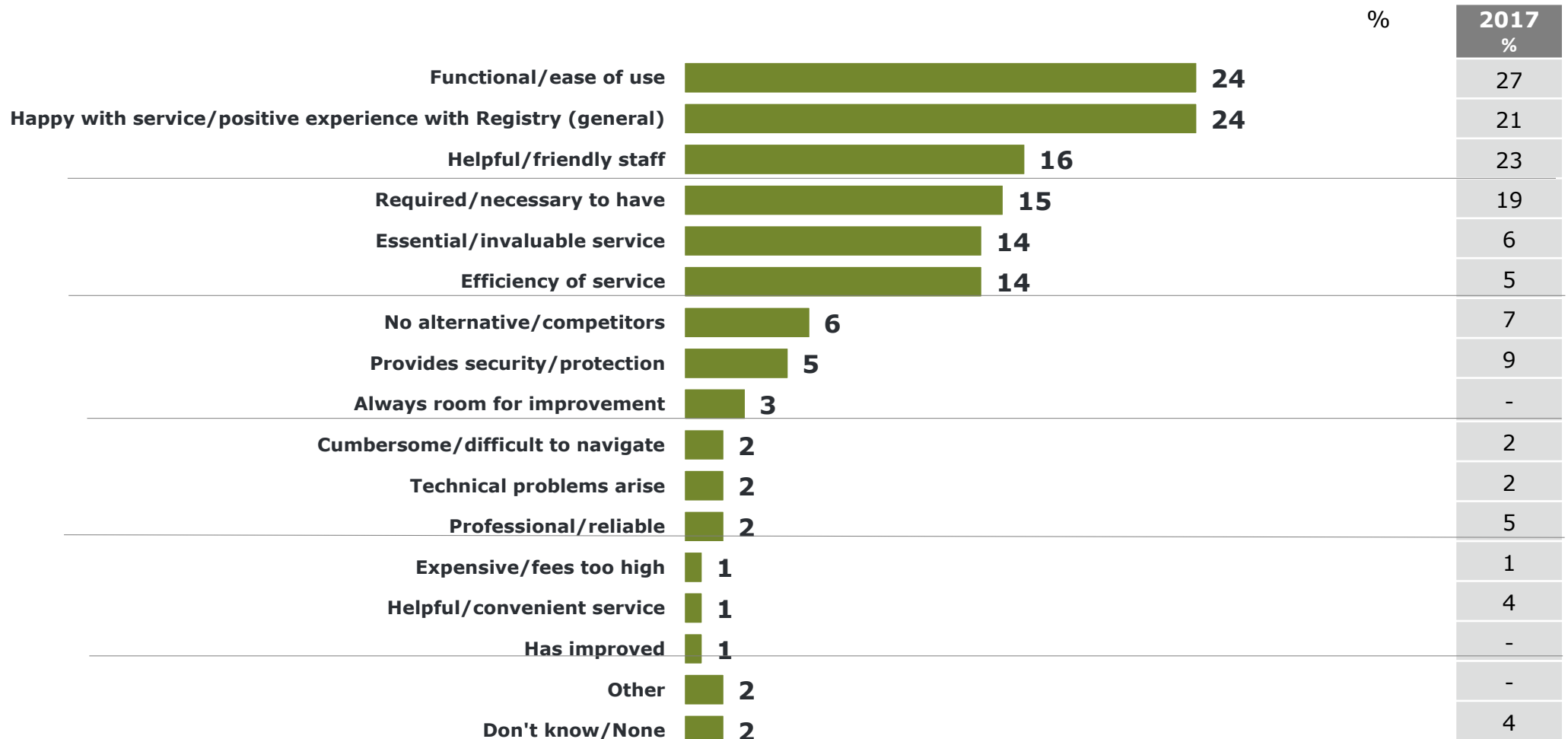
Q.3

And how likely would you be to recommend the Registry to relevant colleagues in the industry on a ten point scale where 10 is extremely likely to recommend, and 1 is extremely unlikely to recommend?

27

# Reasons for Recommend Score

Base: All respondents scoring 9 to 10 n - 177



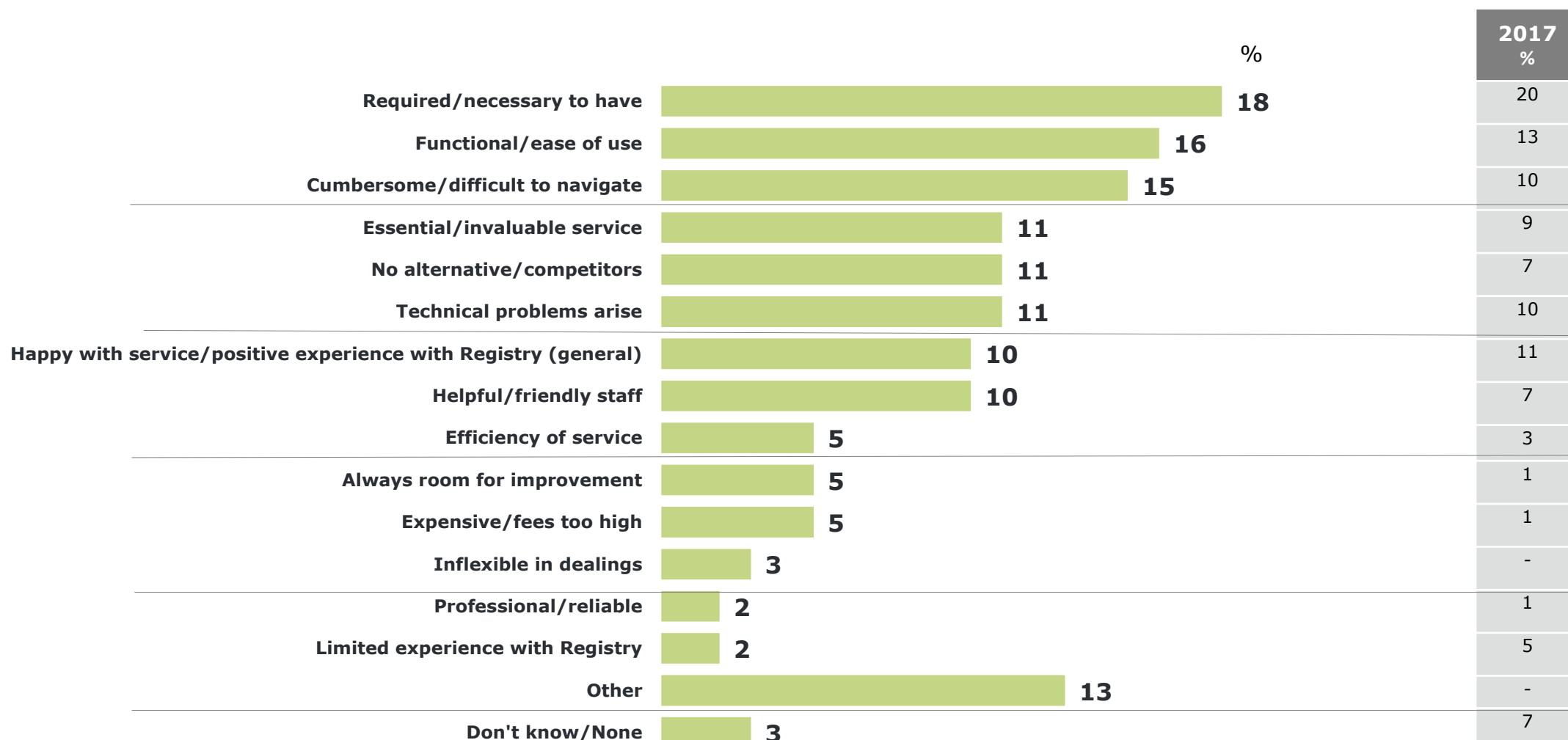
Those particularly happy with the Registry identify its ease of use, general service and helpfulness of staff provided, and the essential nature of the service it provides.



**Q.4** For what specific reasons did you give that score in terms of likelihood to recommend the Registry?

# Reasons for Recommend Score

Base: All respondents scoring 7 to 8 n - 61



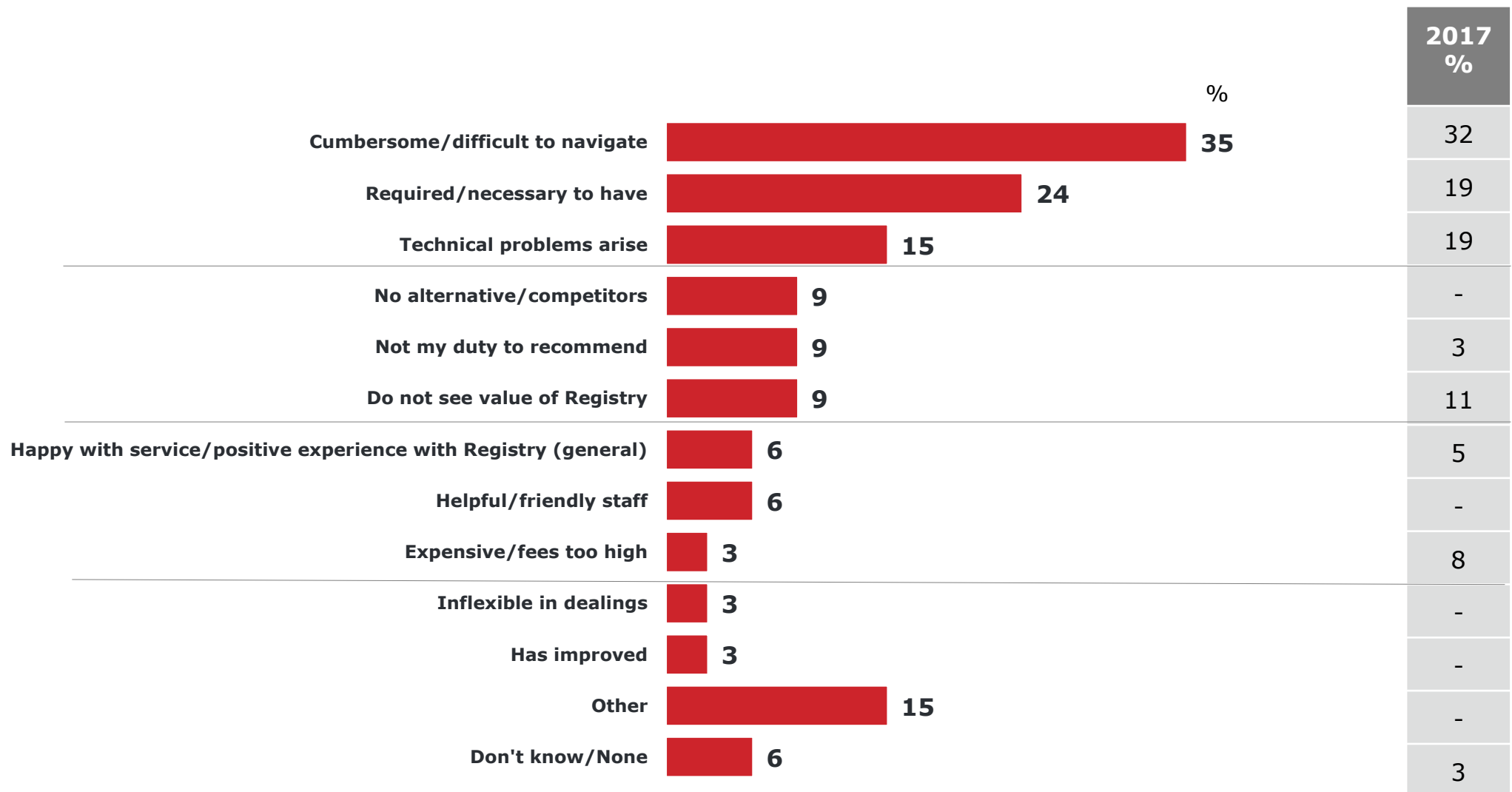
Those scoring the Registry at a more modest 7-8 are generally happy with the service, although 1 in 7 of them report they find it difficult to navigate.



**Q.4** For what specific reasons did you give that score in terms of likelihood to recommend the Registry?

# Reasons for Score

Base: All respondents scoring 1 to 6 n - 34



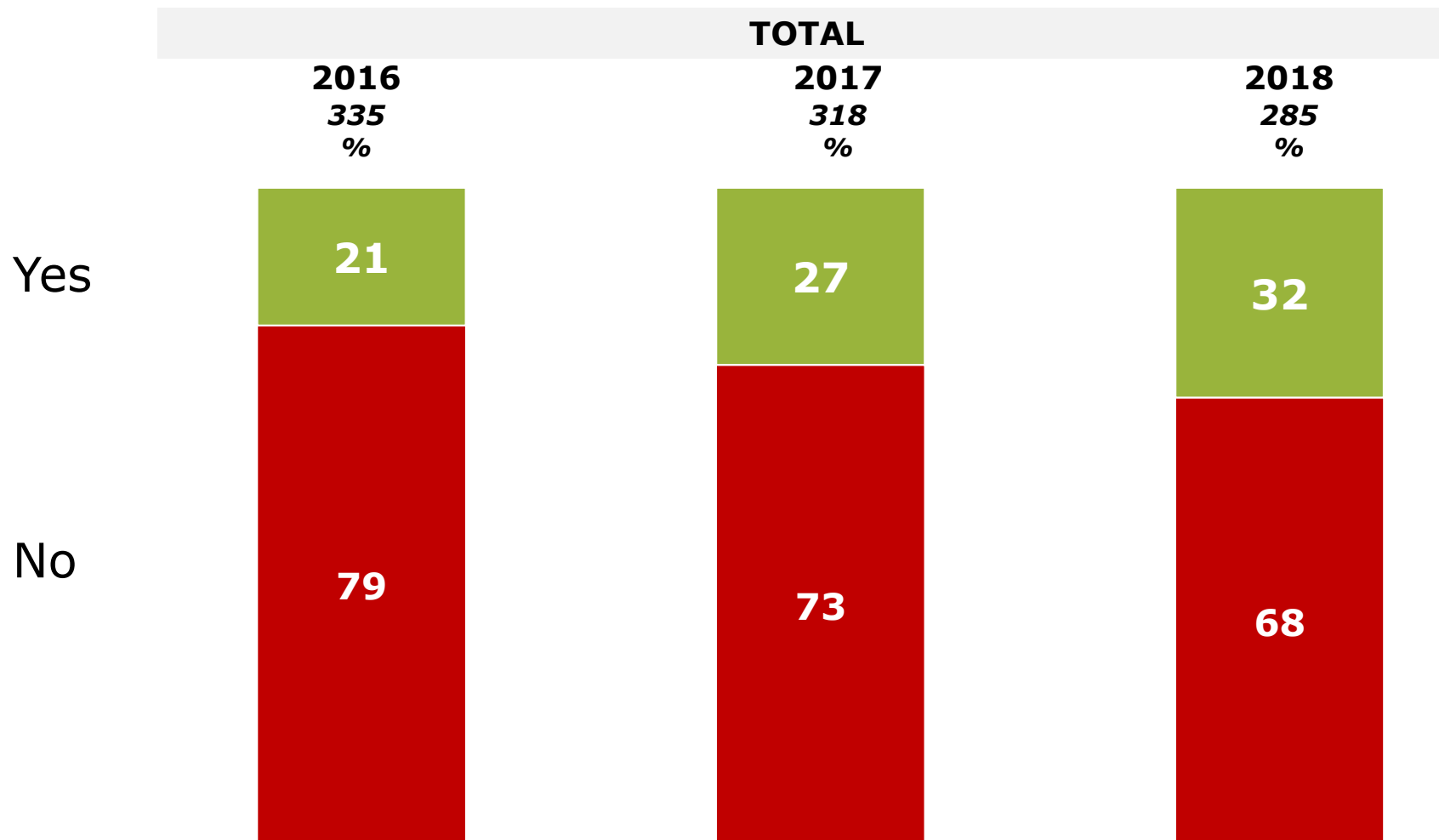
The minority of users who fall into the Detractor segment generally find the Registry cumbersome/difficult to navigate or experience technical difficulties with it.



Q.4 For what specific reasons did you give that score in terms of likelihood to recommend the Registry?

# Use of Closing Room

Base: All respondents



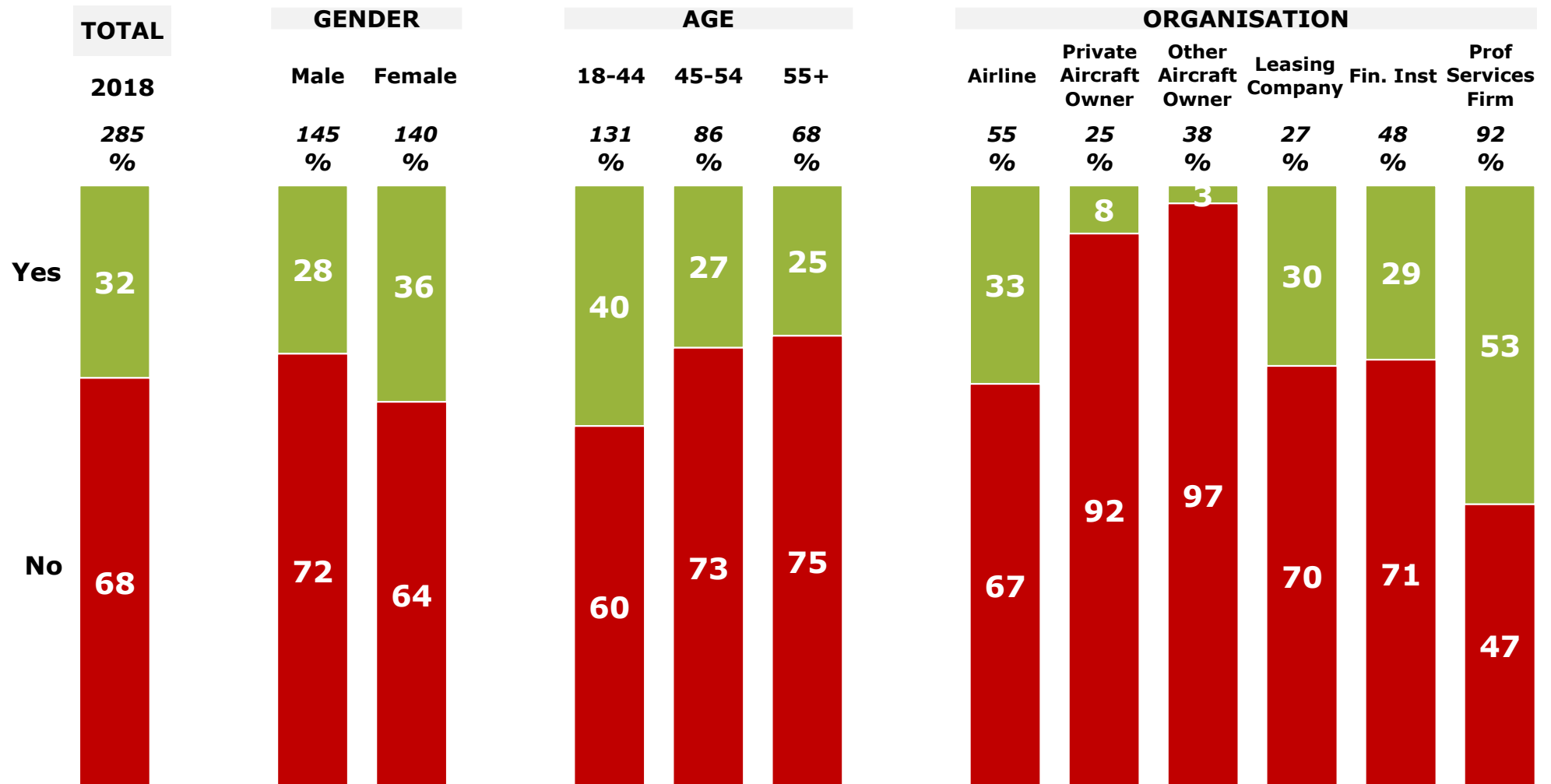
The proportion of respondents using the Closing Room has risen from one in five in 2016 to over a quarter in 2017, to a third in 2018.



**Q.5a** Now thinking specifically about the Closing Room, do you use the Closing Room feature?

# Use of Closing Room

Base: All respondents - 285



Use of the Closing Room is highest amongst the under 55s, as well as airlines, leasing companies and professional services firms, and financial institutions.

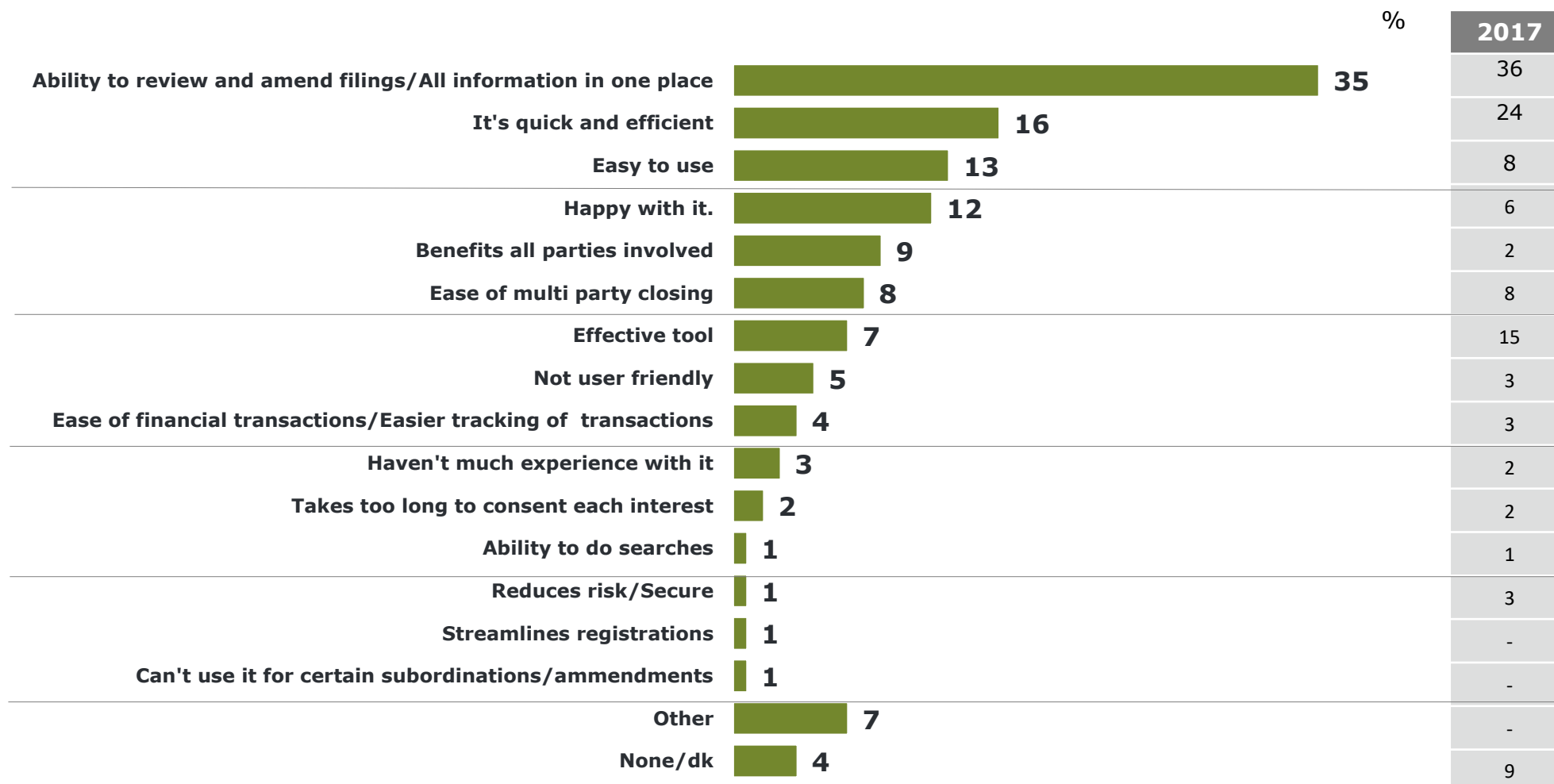


**Q.5a** Now thinking specifically about the Closing Room, do you use the Closing Room feature?



# Benefits of Closing Room

Base: All using the Closing Room - 92



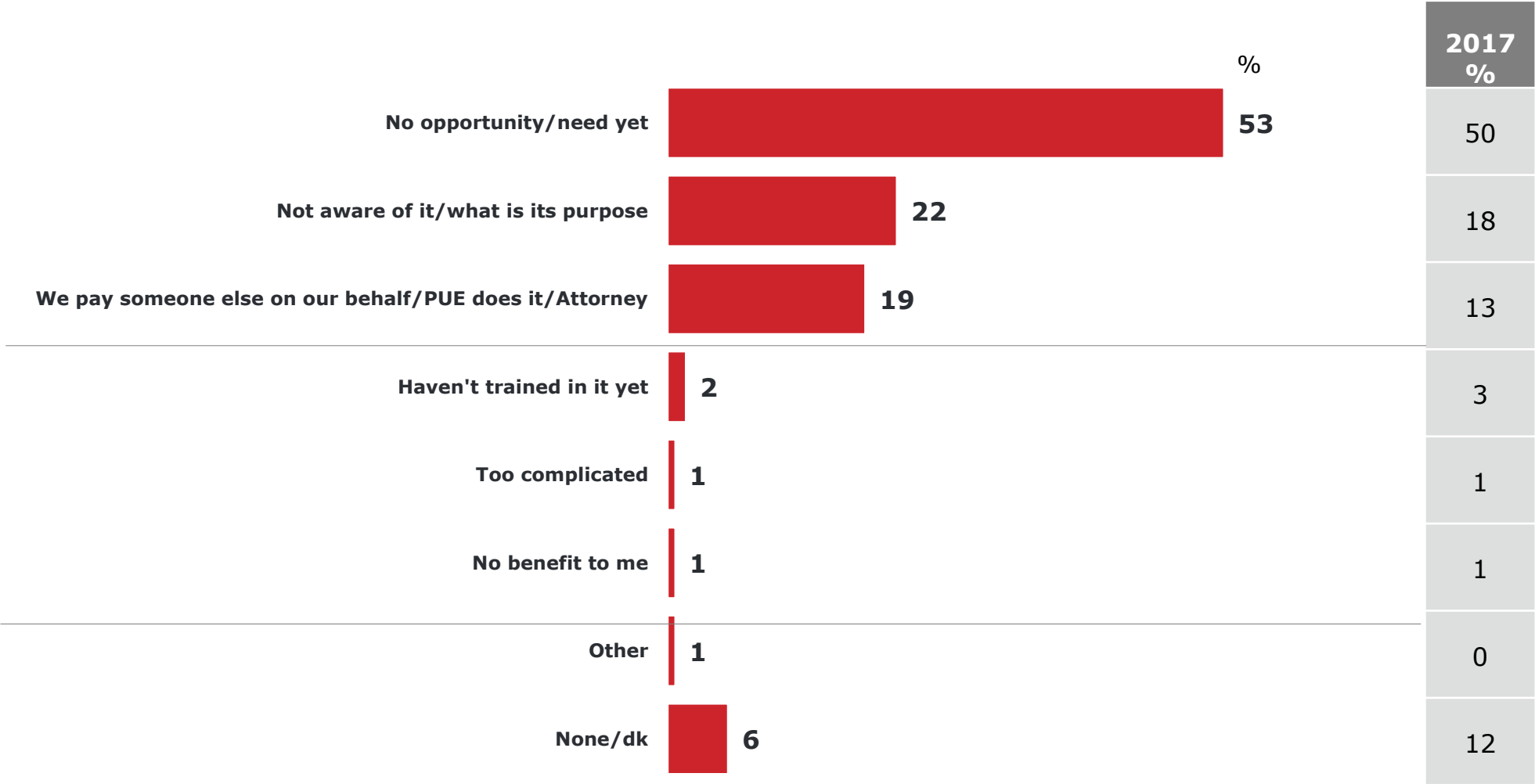
The perceived benefits of the Closing Room remain the ability to review and amend filings in one place, as well as its overall efficiency and effectiveness.



**Q.5b** And could you describe in your own words the benefits you find in using the Closing Room.

# Reasons for not using the Closing Room

Base: All who do not use the Closing Room - 193



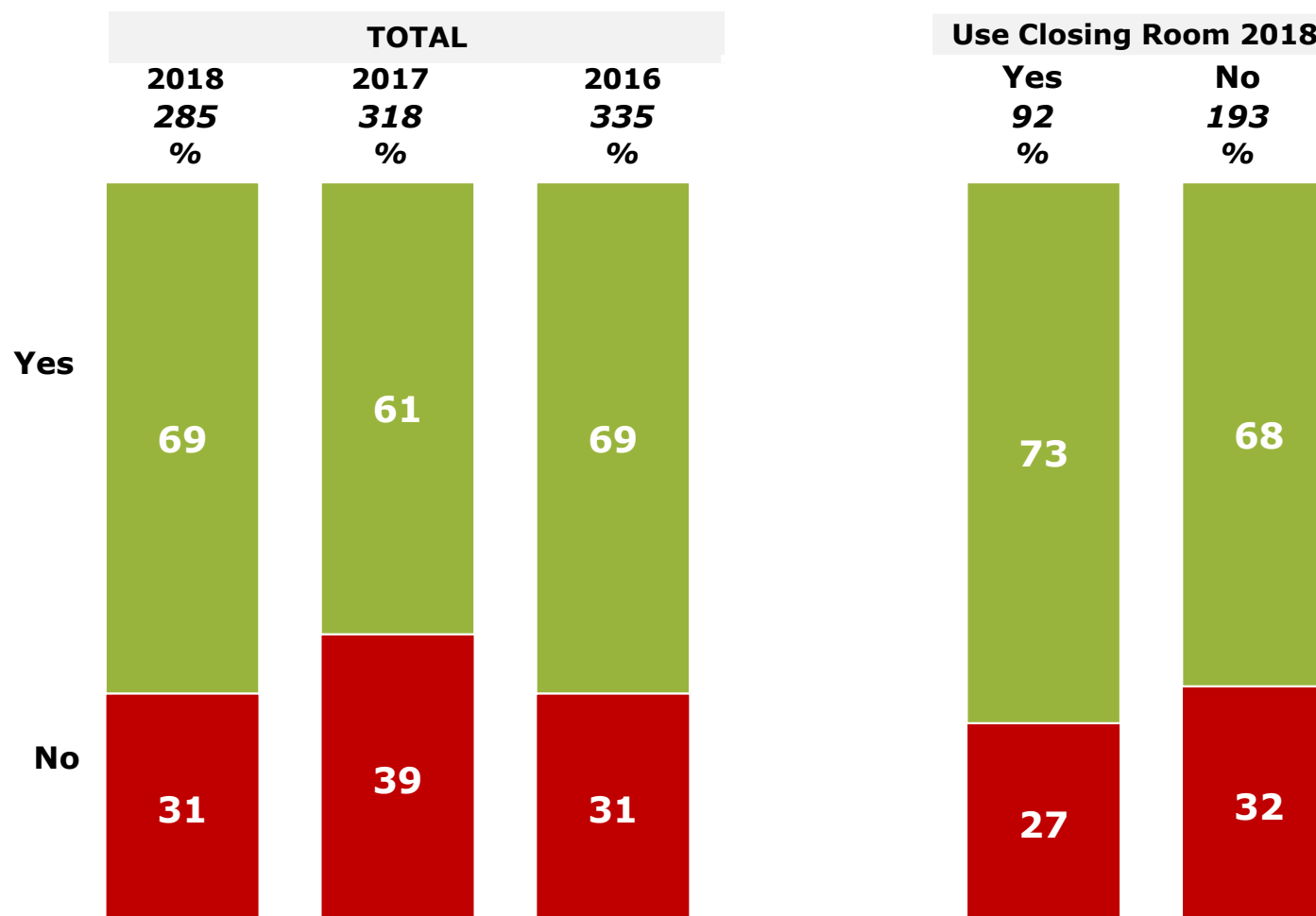
\*0 = less than 1%

There are no specific barriers to future use of the Closing Room, other than a perceived lack of a need for it, suggesting its benefits may be further communicated to users over the coming year.



# Beneficial to have training

Base: All respondents



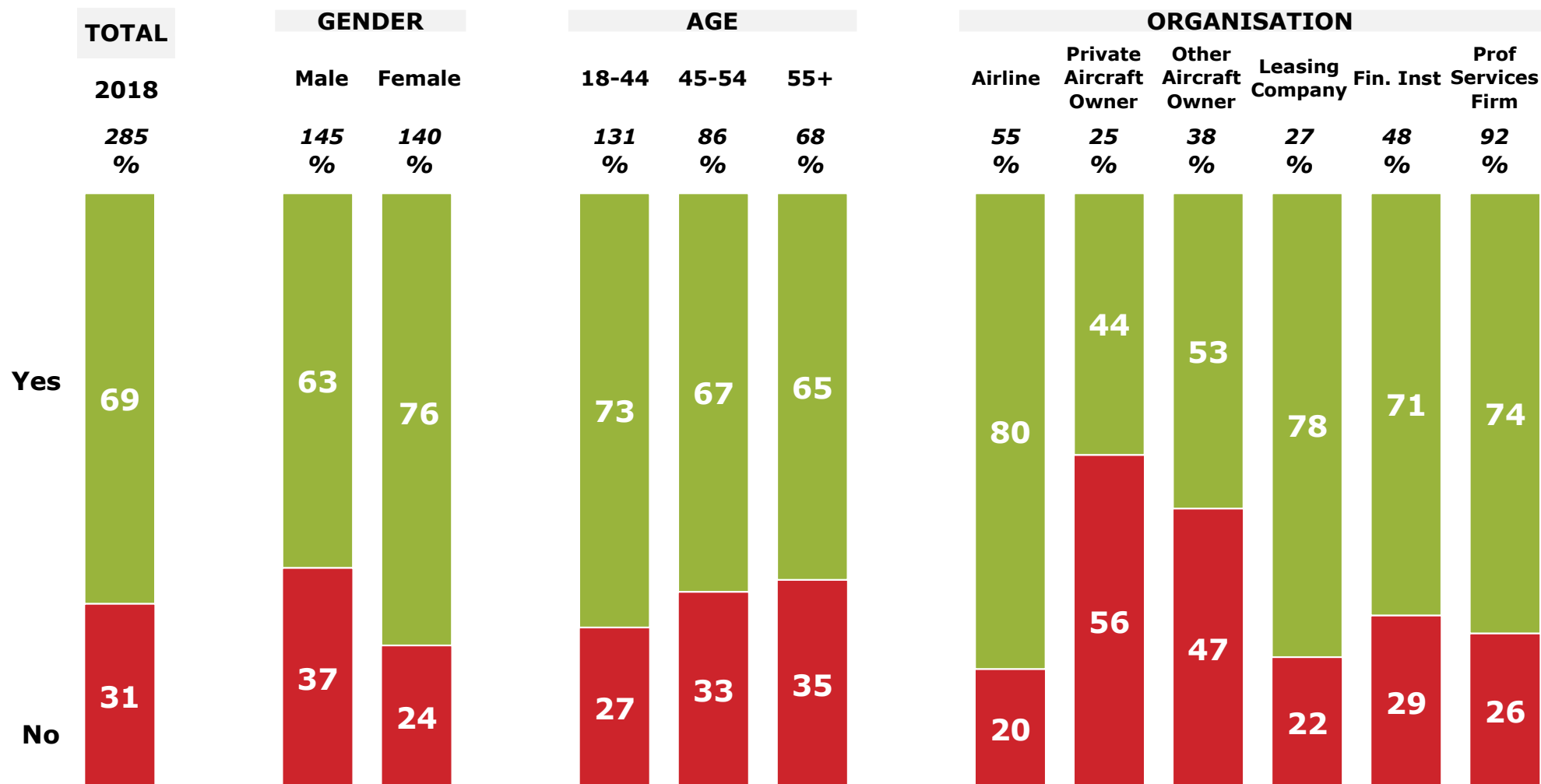
Seven in ten believe it would be helpful to receive training on the Closing Room – including 68% of those who have yet to use the service.



Q.5d Do you feel it would be helpful to have training on the Closing Room?

# Beneficial to have training

Base: All respondents - 285



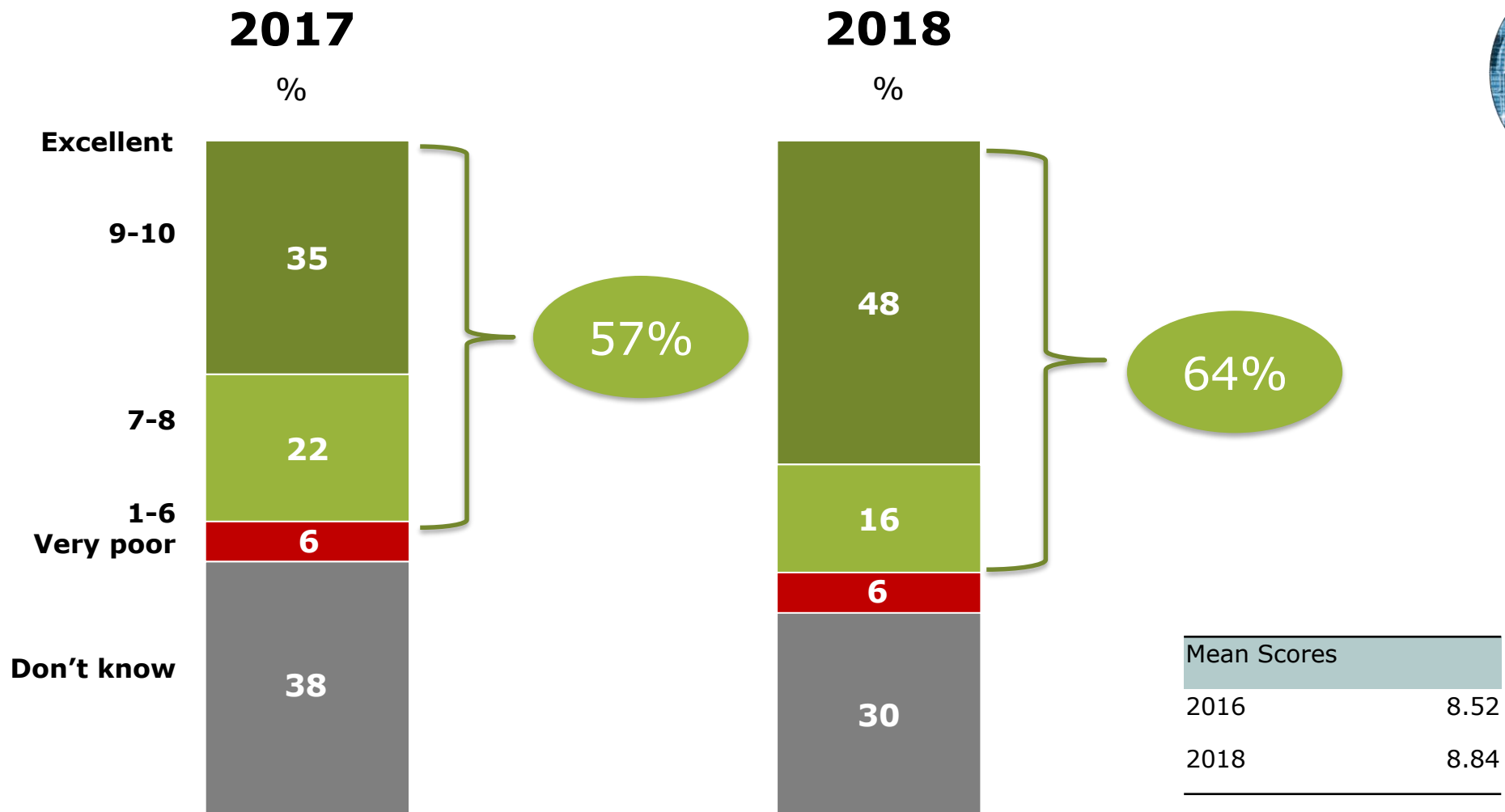
An appetite for Closing Room training is high across most Registry user types.



**Q.5d** Do you feel it would be helpful to have training on the Closing Room?

# Rating on Cybersecurity

Base: All respondents



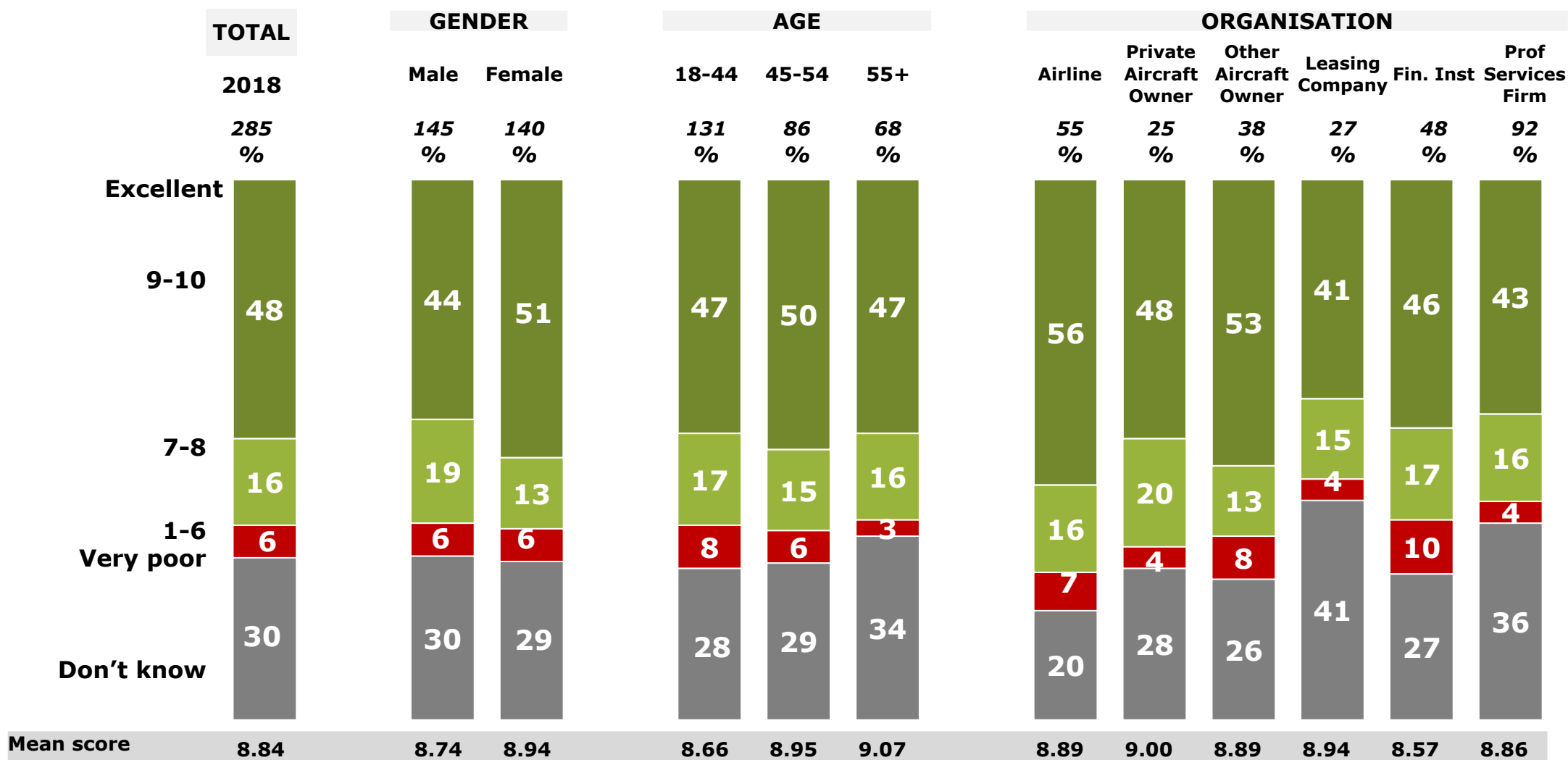
**The Registry is rated extremely positively with regard to information security – scoring 8.84 out of a maximum possible 10 – an increase from 8.52 in 2017.**



**Q.6a** Now we would like to focus on Cybersecurity and how you would rate the Registry in terms of information security. On a scale of 1-10 how would you rate the Registry website on information security where 10 is excellent and 1 is very poor.

# Rating on Cybersecurity

Base: All respondents - 285



Note, almost three in ten of all Registry users do not feel qualified to rate the Registry in terms of information security – undoubtedly a function of the varying levels of technical sophistication amongst the user base.

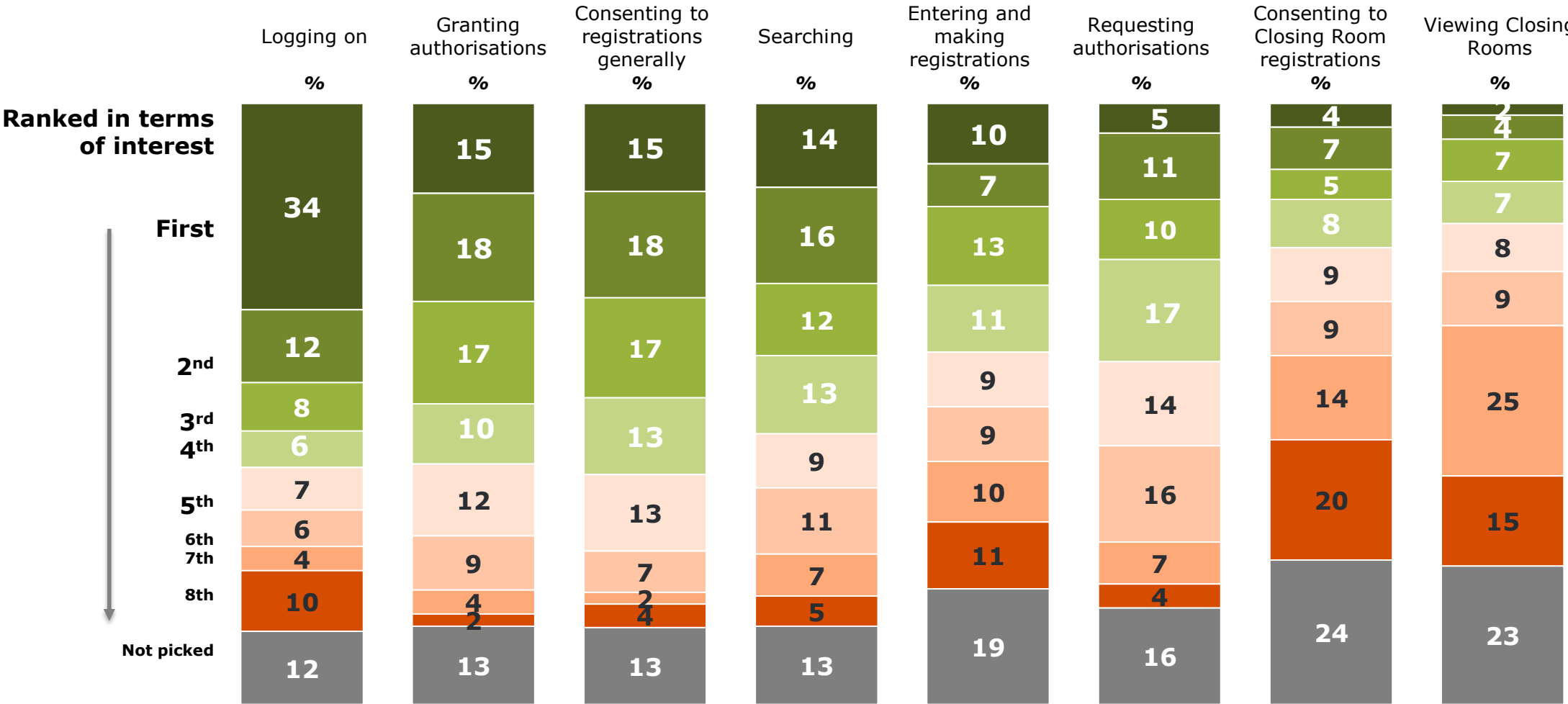


**Q.6a** Now we would like to focus on Cybersecurity and how you would rate the Registry in terms of information security. On a scale of 1-10 how would you rate the Registry website on information security where 10 is excellent and 1 is very poor.

# Interest in Registry Features Available on Mobile App



Base: All respondents - 285



Registry features that users would be most interested in availing of through a mobile device app include logging on, searching, granting authorisations, and consenting to registrations generally.



**Q.6b** Next we would like you to consider the idea of having the Registry available through a mobile device App. Below is a list of the specific Registry features that could be made available through such a mobile device app. Please rank the various features from 1 to 8, where 1 is the feature you would be most interested in using through a mobile app, 2 would be of second most interest to you, right through to 8, which would be the feature you would be least interested in using through an app.

# Interest in Registry Features Available on Mobile App 2018 vs 2017 YoY Comparison

Base: All respondents



Ranked in terms of interest	Logging on		Searching		Granting authorisations		Consenting to registrations generally		Entering and making registrations		Requesting authorisations		Consenting to Closing Room registrations		Viewing Closing Rooms	
	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018	2017	2018
1	38	34	17	14	15	15	11	15	7	10	6	5	4	4	1	2
2	12	12	20	16	16	18	14	18	10	7	10	11	7	7	2	4
3	7	8	12	12	17	17	15	17	11	13	12	10	7	5	5	7
4	6	6	8	13	11	10	15	13	10	11	13	17	8	8	9	7
5	6	7	11	9	10	12	11	13	12	9	10	14	8	9	9	8
6	5	6	10	11	8	9	13	7	10	9	14	16	7	9	6	9
7	3	4	4	7	5	4	4	2	7	10	10	7	14	14	21	25
8	7	10	4	5	4	2	1	4	9	11	4	4	19	20	16	15
Not picked	16	12	14	13	14	13	16	13	24	19	21	16	26	24	31	23

**The same mobile app features were deemed of interest in 2018 as in 2017, with increased interest in 2018 in consenting to registrations generally.**



**Q.6b** Next we would like you to consider the idea of having the Registry available through a mobile device App. Below is a list of the specific Registry features that could be made available through such a mobile device app. Please rank the various features from 1 to 8, where 1 is the feature you would be most interested in using through a mobile app, 2 would be of second most interest to you, right through to 8, which would be the feature you would be least interested in using through an app.



# Interest in Registry Features Available on Mobile App

Mean scores inverted

Base: All respondents - 285



	Total	Gender		Age			Organisation					
		Male	Female	18-44	45-54 yrs	55 yrs +	Airline owners	Private owners	Other Owner	Lease company	Fin inst.	Prof firm
Logging on	5.15	5.11	5.19	4.85	5.57	5.19	5.58	4.60	5.89	4.41	5.71	4.66
Consenting to registrations generally	4.98	5.09	4.86	4.73	5.22	5.16	5.40	4.80	5.11	5.78	4.94	4.51
Granting authorisations	4.94	4.92	4.96	4.97	4.95	4.87	5.35	4.04	4.63	5.33	5.13	4.86
Searching	4.63	4.65	4.61	4.76	4.70	4.28	4.04	3.36	5.18	4.33	4.65	5.17
Requesting authorisations	3.99	3.98	4.00	4.29	3.66	3.82	3.62	3.96	3.58	3.85	3.71	4.58
Entering and making registrations	3.81	3.75	3.86	4.00	3.93	3.28	3.42	4.68	3.39	4.37	3.60	3.91
Consenting to Closing Room registrations	2.87	2.83	2.91	2.83	2.95	2.84	3.29	2.32	2.55	3.04	2.27	3.16
Viewing Closing Rooms	2.69	2.72	2.66	2.61	2.86	2.63	2.53	2.16	2.34	2.52	2.88	3.03

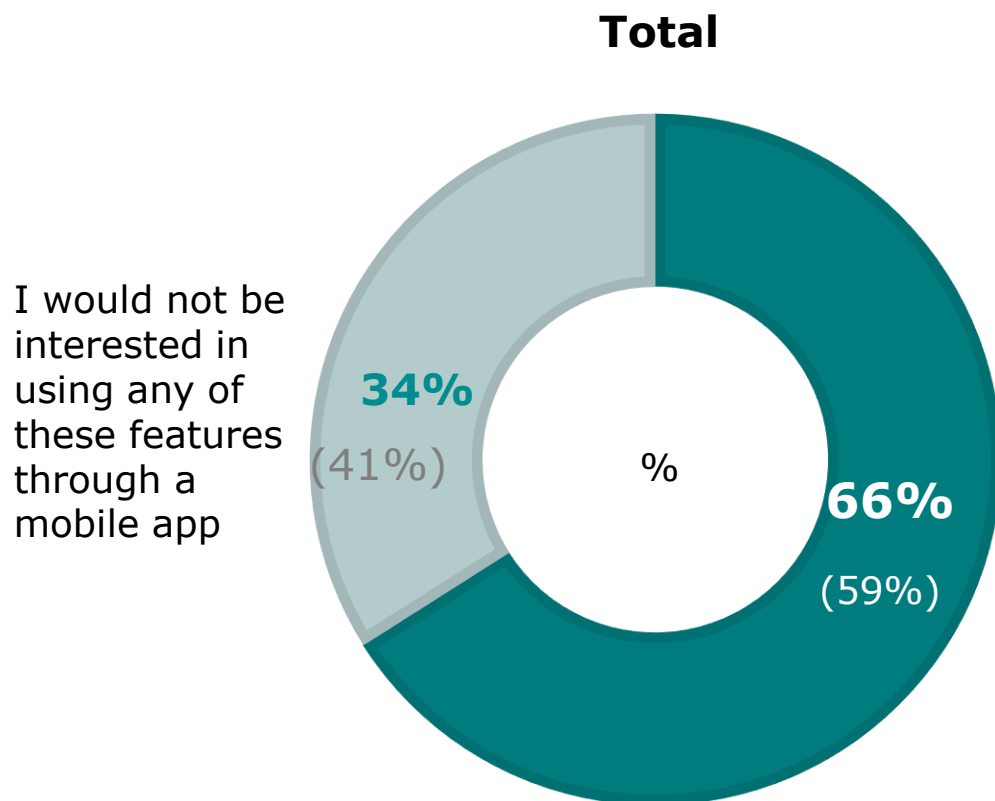
**Interest in consenting to registrations generally on a mobile app are particularly high amongst lease companies, and airline owners.**



**Q.6b** Next we would like you to consider the idea of having the Registry available through a mobile device App. Below is a list of the specific Registry features that could be made available through such a mobile device app. Please rank the various features from 1 to 8, where 1 is the feature you would be most interested in using through a mobile app, 2 would be of second most interest to you, right through to 8, which would be the feature you would be least interested in using through an app.

# Overall interest in using features on mobile device app

Base: All respondents - 285



I would not be interested in using any of these features through a mobile app

I would be interested in using all of these features through a mobile device app.

( ) Figs in brackets = 2017

**Two-thirds of all Registry users would be interested in using all of the proposed features through a mobile device app.**



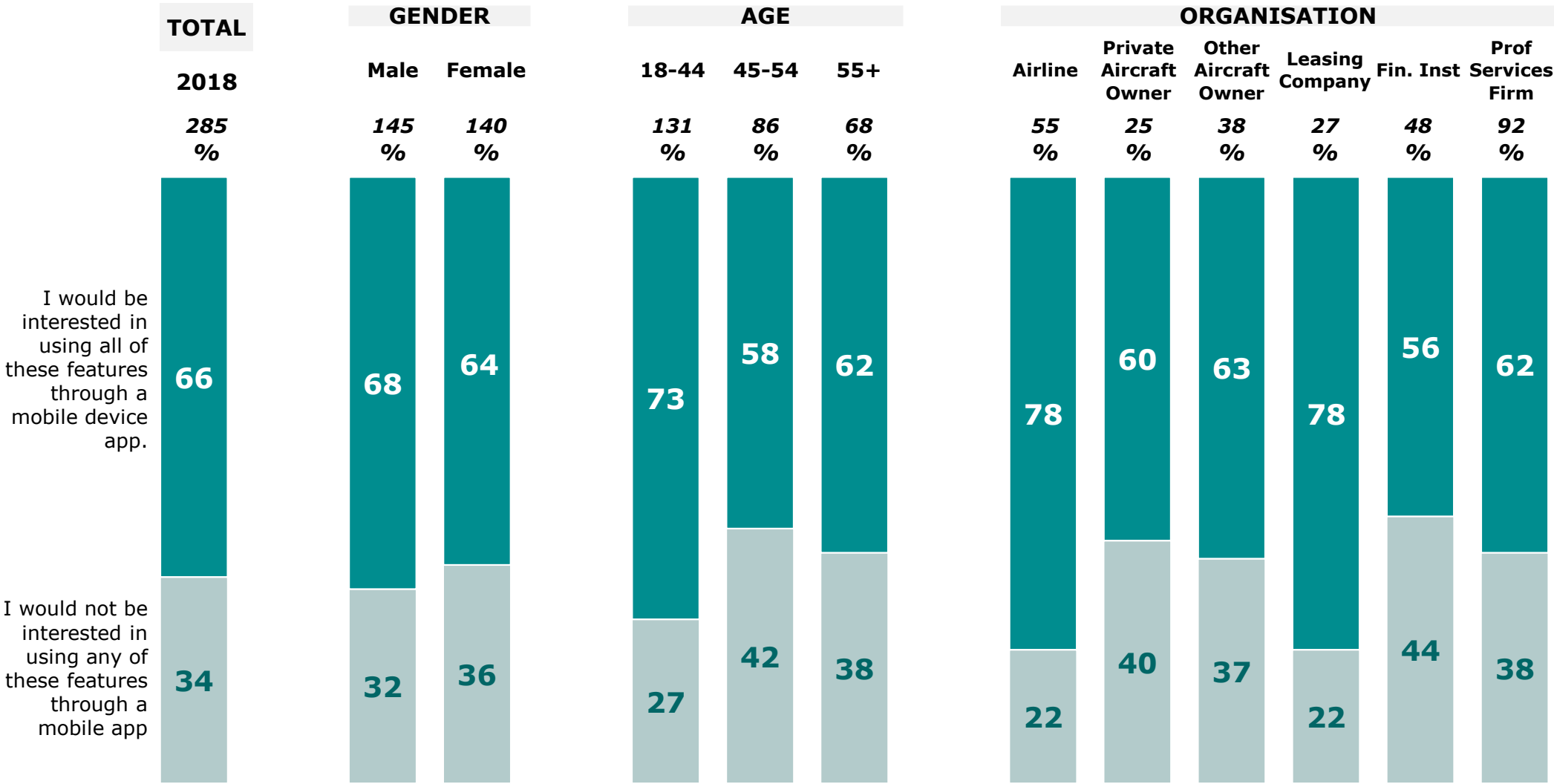
**Q.6c** And which of the following statements best describes your overall view on such a mobile device app?



# Overall interest in using features on mobile device app



Base: All respondents - 285



As might be expected, interest in the use of the system via mobile app increases the younger the user is, and is also highest amongst airline and leasing companies.



**Q.6c** And which of the following statements best describes your overall view of such a mobile device app?



# Summary



## Sample Profile

- Three in ten of the user sample base is from professional services firms, with 41% aircraft owners of some type.
- Just over half of respondents were first-time participants in the survey in 2018 – with these “first-timers” more likely to be male, younger (18-44 years) and located outside the U.S.
- The profile of user type is in line with that of last year’s sample.
- With users fairly evenly split by gender, 60% of the 2018 sample is aged 35-55 years, compared to 53% aged 35-55 years in 2017.
- The users’ role in their organisation is very similar to that registered in 2017.
- Use of social media has remained relatively flat, albeit high, since 2016.
- Use of LinkedIn is particularly high amongst airline owners, lease companies, senior partners/managers, and finance professionals.
- 13% of all Registry users use the system at least once a day, with 67% accessing it at least once a month. This monthly+ figure is higher than the 63% recorded in last year’s sample, and back up to the 2016 monthly plus usage level of 66%.
- In 2016 there had been a year-on-year drop in the proportion of users based in the USA, compared to the year before (from 49% to 44%) and again from 44% to 41% between 2016 and 2017. This year, that trend continues, with 39% of 2018 respondents based in the USA.

## Key Service Aspects

- As has been the case since the outset, the fit of Registry with business functionality remains the single most important definer of the perceived worth of the Registry, followed by its ease of use. Reliability of technical aspects of the registry has increased in importance this year.
- The overall weighted Registry experience rating has inched up this year to a remarkably high score of 8.73 out of a possible 10. As has been noted on previous surveys, this is an extremely high score for any B2B service, most of which struggle to reach the 8.0 mark.
- The Registry's overall satisfaction rating also continues to exceed 8 out of 10.
- This rating has actually improved somewhat amongst older (45+ years) users, and those working in lease companies.
- The perceived worth of the Registry to users business remains extremely high – with limited scope for further significant improvements beyond 8.3 out of 10.
- Performance satisfaction has improved most notably in relation to speed of refunds, registry/business function fit, fees charged, resolution of queries, and reliability of technical aspects.

## **Overall Satisfaction & Likelihood to Recommend Registry**

- Overall satisfaction with the Registry, in keeping with general survey results, remains at over 8 out of 10 with greatest satisfaction amongst professional services firms, leasing companies and airlines.
- The Registry Net Promoter Score (NPS) has increased to a very high +50. The NPS score stands at a remarkable +70 amongst professional services firm users - up 10 points since 2017.
- Those particularly happy with the Registry identify its ease of use, general service and helpfulness of staff provided, and the essential nature of the service it provides.
- Those scoring the Registry at a more modest 7-8 are generally happy with the service, although 1 in 7 of them report they find it difficult to navigate.
- The minority of users who fall into the Detractor segment generally find the Registry cumbersome/difficult to navigate or experience technical difficulties with it.
- The proportion of respondents using the Closing Room has risen from one in five in 2016 to over a quarter in 2017, to a third in 2018.

- Overall, levels of satisfaction with all aspects remain very high – with the vast majority of them either at, or above 8.0 out of a possible 10.
- Note the marginal satisfaction increases with 5 of the Top 6 criteria.
- Satisfaction with each of the remaining aspects approaches or exceeds 9 out of 10.
- In general, satisfaction is highest amongst females and users aged 45 to 54 years, as well as amongst professional firms, lease companies and airline owners.

## **Strategic Performance Analysis**

- By this stage of the research programme, there are very few aspects of service which require critical or remedial attention.
- The broad pattern of strategic performance for the Registry is very similar in 2018 to that which prevailed in 2017.
- In superimposing the 2018 data on the original 2007 strategic performance map, we can see the extraordinary extent of the user improvements made over the last 12 years.



## The Closing Room

- Use of the Closing Room is highest amongst the under 55s, as well as airlines, leasing companies and professional services firms, and financial institutions.
- The perceived benefits of the Closing Room remain the ability to review and amend filings in one place, as well as its overall efficiency and effectiveness.
- There are no specific barriers to future use of the Closing Room, other than a perceived lack of a need for it, suggesting its benefits may be further communicated to users over the coming year.
- Seven in ten believe it would be helpful to receive training on the Closing Room – including 68% of those who have yet to use the service.
- An appetite for Closing Room training is high across most Registry user types.

## **Cybersecurity and Potential Interest in Mobile App Device**

- The Registry is rated extremely positively with regard to information security – scoring 8.84 out of a maximum possible 10 – an increase from 8.52 in 2017.
- Note, almost three in ten of all Registry users do not feel qualified to rate the Registry in terms of information security – undoubtedly a function of the varying levels of technical sophistication amongst the user base.
- Registry features that users would be most interested in availing of through a mobile device app include logging on, searching, granting authorisations, and consenting to registrations generally.
- The same mobile app features were deemed of interest in 2018 as in 2017, with increased interest in 2018 in consenting to registrations generally.
- Interest in consenting to registrations generally on a mobile app are particularly high amongst lease companies, and airline owners.
- Two-thirds of all Registry users would be interested in using all of the proposed features through a mobile device app.
- As might be expected, interest in the use of the system via mobile app increases the younger the user is, and is also highest amongst airline and leasing companies.

# Thank You



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