INTERNATIONAL REGISTRY OF MOBILE ASSETS

Aviareto User Survey

November 2021

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B&A RESEARCH & INSIGHT

Research Background & 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 every year with a view to assessing the state of play year on year.

Research Methodology

Online survey of Registry users, by way of structured questionnaire.

Potential respondents initially contacted by Aviareto, with survey rationale explained.

The Questionnaire mailed to total contact sample of 5,491 users.

All aspects of the study was conducted in compliance with the technical and ethical standards stipulated by the European Society of Opinion and Market Research (ESOMAR). All data was anonymised in line with Data Protection regulations and B&A ISO 27001 Information Security Management system.

Total achieved sample of **309** users.

300 users in 2020, 254 users in 2019, 285 users in 2018, 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 6.5% - at the upper end of response rates for a survey of this nature.

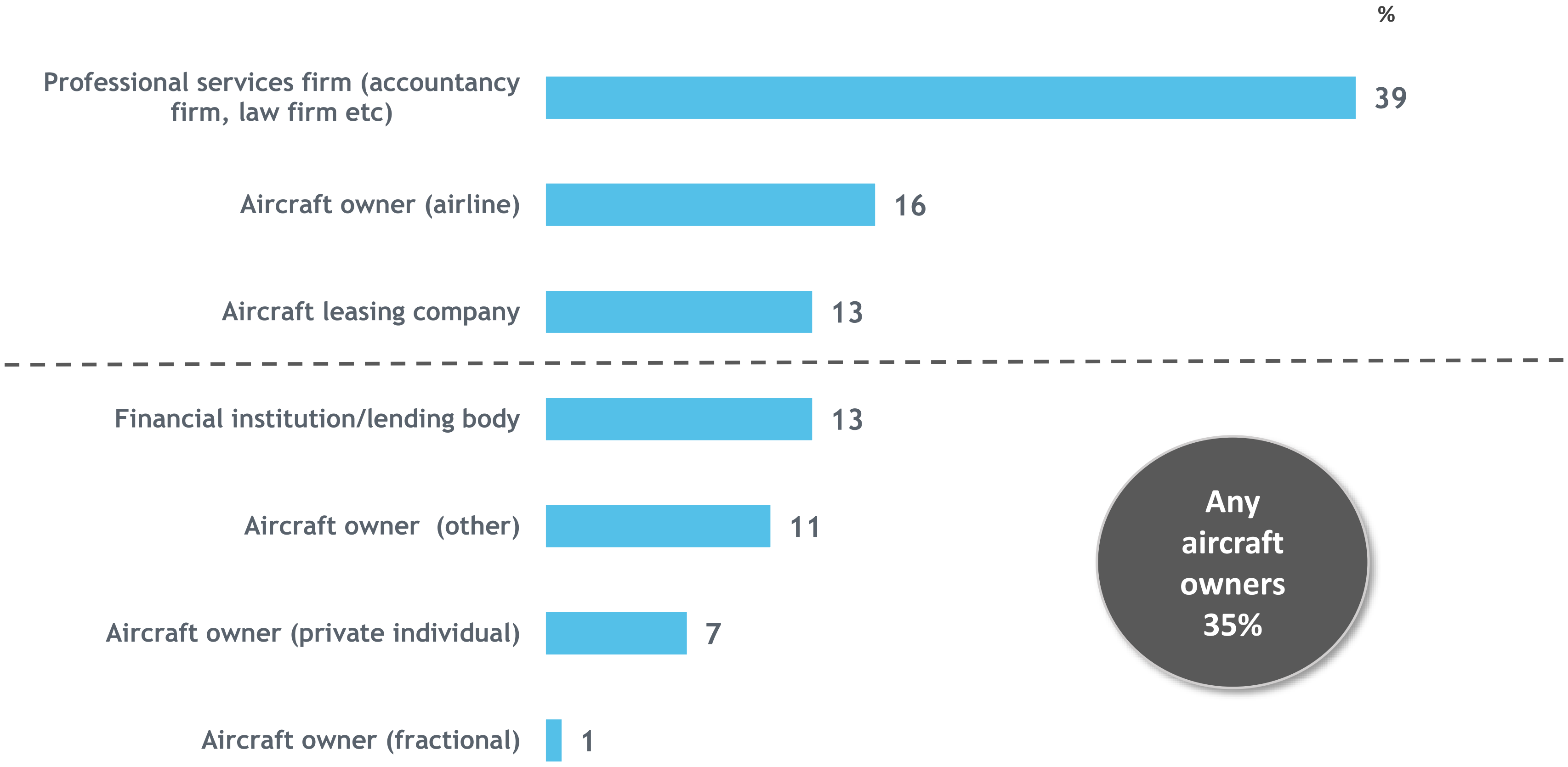
The interviews were completed in English, Spanish and French.

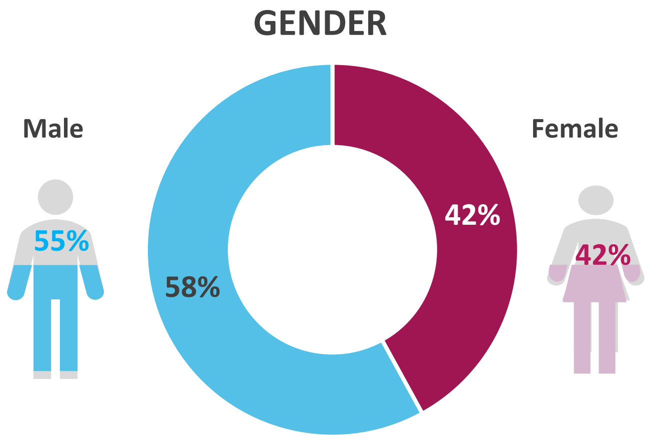
Fieldwork for the project took place between 5th October – 7th November 2021. An incentive offered for the first time in 2009 (3 x draws for $250 Amazon voucher), and each year since then.

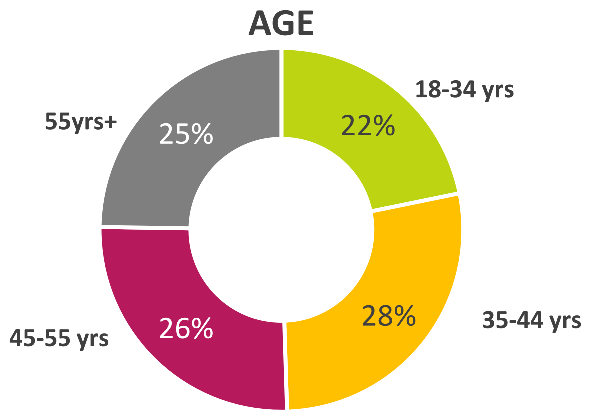
Sample Profile

Sample Profile 2021

Base: All Users N - 309



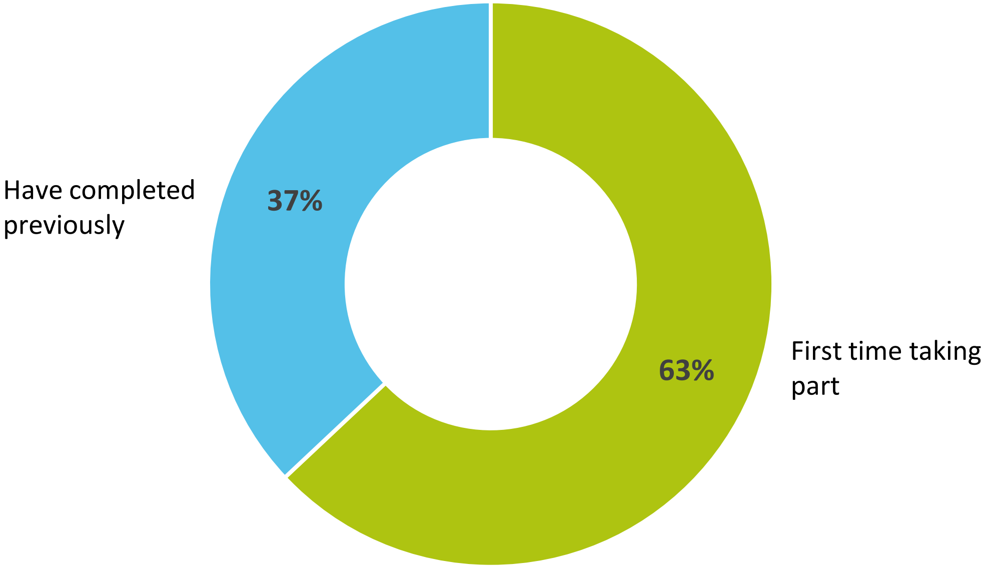




Four in ten (39%) of the user sample base is from Professional Services firms, with 35% aircraft owners of some type.

Sample Profile 2021

Base: All Users N - 309



	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	180	129	153	79	77	50	22	37	39	40	121	104	205
	%	%	%	%	%	%	%	%	%	%	%	%	%
First time taking part	**70**	54	**68**	**66**	52	66	**82**	70	69	60	56	58	**66**
Have completed previously	30	46	32	34	48	34	18	30	31	40	44	42	34

Significantly higher than total
Significantly lower than total

6 in 10 respondents (63%) completed the survey for the first time in 2021. These "first-timers" are more likely to be male, under 55, from private organisations and based in countries outside the US.

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

Sample Profile Comparison

Base: All Users N - 309

			Previous Waves												
	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007
	%		%	%	%	%	%	%	%	%	%	%	%	%	%
Professional services firm	39	40	31	32	30	32	35	29	30	26	24	27	28	29	17
Aircraft owner (airline)	16	14	20	19	18	18	15	12	15	13	12	8	11	9	7
Aircraft leasing company	13	16	14	9	10	12	13	12	12	11	12	13	8	8	8
Financial/lending institution	13	11	14	17	18	14	16	18	17	20	23	21	19	17	17
Other aircraft owner	11	12	11	13	17	17	13	20	17	21	18	19	19	23	32
Aircraft owner (private individual)	7	8	9	9	7	7	8	9	8	8	10	10	13	14	18
Aircraft owner fractional	1	1	1	0	1	1	1	1	2	1	1	2	2	n/a	n/a

The profile of user type is broadly in line with 2020's sample, with Professional Services Firms making up the bulk of the sample again this year.

Q. *Analysis of Sample*

Sample Profile 2021

Base: All Users N - 309

		Previous Waves													
	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007
Gender	%	%	%		%	%	%	%	%	%	%	%	%	%	%
Male	58	55	47	51	53	49	47	50	48	50	50	50	47	44	63
Female	42	45	53	49	47	51	53	50	52	50	50	50	53	55	37
Age	%%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
18-34	22	25	18	16	20	25	24	23	20	19	20	20	19	17	13
35-44	28	28	28	30	24	27	28	27	30	30	28	28	29	24	22
45-55	26	23	27	30	29	27	26	26	29	29	31	31	32	32	39
55+	25	24	26	24	27	20	22	24	21	22	22	22	21	26	26

The sample is slightly skewed towards males again this year. In terms of age, the 18-34 cohort (22%) has decreased slightly this year compared to last year (25%), while the 45-55 cohort has increased slightly (26% vs 23% last year).

Sample Profile 2021

Base: All Users N - 309

	2020	2019	2018	2017	2016
Senior manager/partner	29	32	28	33	31
Lawyer	25	20	22	19	19
Finance professional	13	17	14	18	20
General administration/Office support	17	14	23	18	18
Legal assistant	15	17	13	13	12

3 in 10 users (31%) are senior managers/partners which is similar to last year (29%). Lawyers and finance professionals have both gone up slightly this year, while general admin staff and legal assistants have gone down slightly.

Sample Profile 2021 - Social Media Usage

Base: All Users N - 309

Significantly higher than total
Significantly lower than total

Other mentions down as now Instagram called out

	Total										2021				
											Gender		Age		
	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012	Male	Female	18-44	45-54	55+
Base:	***309***	***300***	***254***	***285***	***318***	***335***	***317***	***352***	***345***	***349***	***180***	***129***	***153***	***79***	***77***
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Facebook	48	49	47	55	56	60	58	54	57	52	41	**58**	**51**	47	44
Linkedin	61	61	53	55	57	59	54	53	48	43	**65**	54	**63**	56	60
Twitter	20	21	17	17	20	19	16	16	18	16	19	**22**	20	**24**	17
Instagram*	39	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	29	**53**	**48**	42	18
Other	6	17	11	10	8	9	5	6	4	4	41	**58**	**51**	47	44
None	18	17	28	21	22	20	20	24	27	32	22	13	15	14	30
Any Facebook/ Linkedin	**74**	**75**	**67**	**76**	**75**	**77**	**79**	**73**	**70**	**66**	**72**	**76**	**76**	**75**	**68**
Any Facebook/ Linkedin/ Twitter/Instagram*	**80***	**83**	**72**	**79**	**78**	**80**	**80**	**76**	**73**	**68**	**77**	**85**	**84**	**84**	**70**

There has been no real change in levels of social media usage compared to last year. Social media usage is higher among females for all of the social media platforms with the exception of LinkedIn and higher among the younger age group (18-44 years) with the exception of Twitter.

Analysis of Sample

**Instagram was only included in the survey this year*

Sample Profile 2021 - Social Media Usage

Base: All Users N - 309

Significantly higher than total
Significantly lower than total

B&A

	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
Base:	*309*	*50*	*22*	*37*	*39*	*40*	*121*	*96*	*123*	*49*	*41*
	%	%	%	%	%	%	%	%	%	%	%
Linkedin	61	52	55	59	64	63	64	**73**	57	61	**41**
Facebook	48	44	55	51	51	50	46	51	42	45	63
Instagram	39	30	36	41	38	33	45	34	42	33	49
Twitter	20	12	23	27	21	13	24	24	19	**8**	32
Other	6	4	5	3	5	8	7	5	2	6	15
None	18	22	18	27	18	15	16	17	20	18	20

Senior managers/partners register significantly higher levels of LinkedIn usage, while finance professionals register significantly low levels of Twitter usage.

Sample Profile 2021

Frequency of International Registry system usage

Base: All Users N - 309

Significantly higher than total
Significantly lower than total

B&A

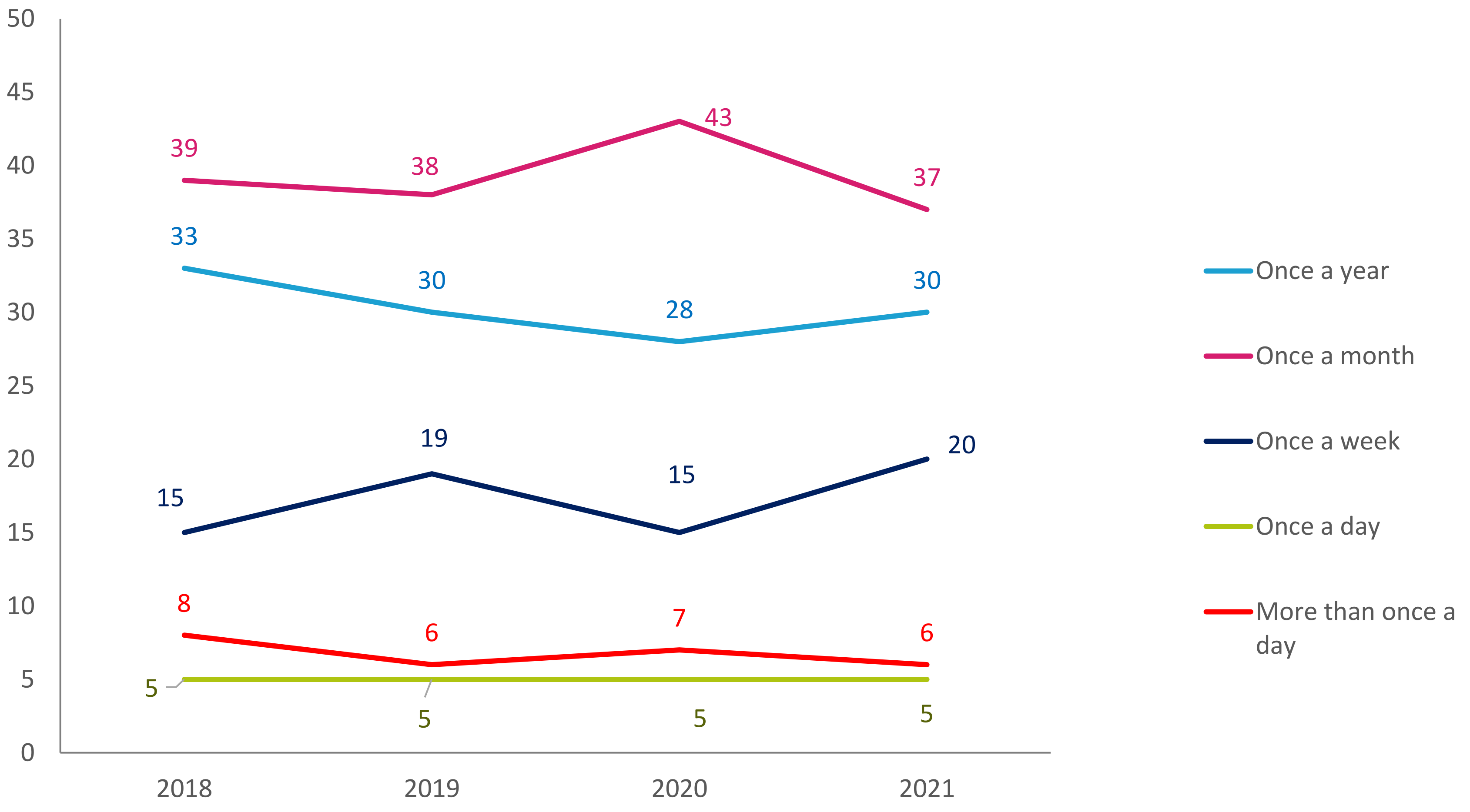
	Total	Gender		Age			Organisation						Role in the organisation			
	2021	Male	Female	18-44	45-54 yrs	55 yrs +	Airline owners	Private owners	Other Owner	Lease company	Fin inst.	Prof firm	Senior manager/ partner	Law	Finance profess ional	General
Base:	***309***	***164***	***136***	***159***	***70***	***71***	***41***	***23***	***37***	***48***	***32***	***119***	***88***	***121***	***38***	***53***
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Never	2	4	-	1	3	4	-	14	-	3	-	2	5	1	-	2
Once a year	30	33	26	25	37	32	30	68	46	15	40	19	39	21	35	29
Once a month	37	39	34	42	29	36	52	9	30	46	30	38	36	42	39	22
Once a week	20	16	25	20	24	14	16	5	19	28	28	19	16	20	24	24
Once a day	5	4	5	5	3	5	-	-	3	3	-	10	2	10	-	-
More than once a day	6	3	11	7	5	8	2	5	3	5	3	12	2	7	2	22

Users typically use the registry once a month (37%), followed by once a year (30%) and then once a week (20%).

How often do you use the International Registry system?

Frequency of Usage

Base: All Users N - 309

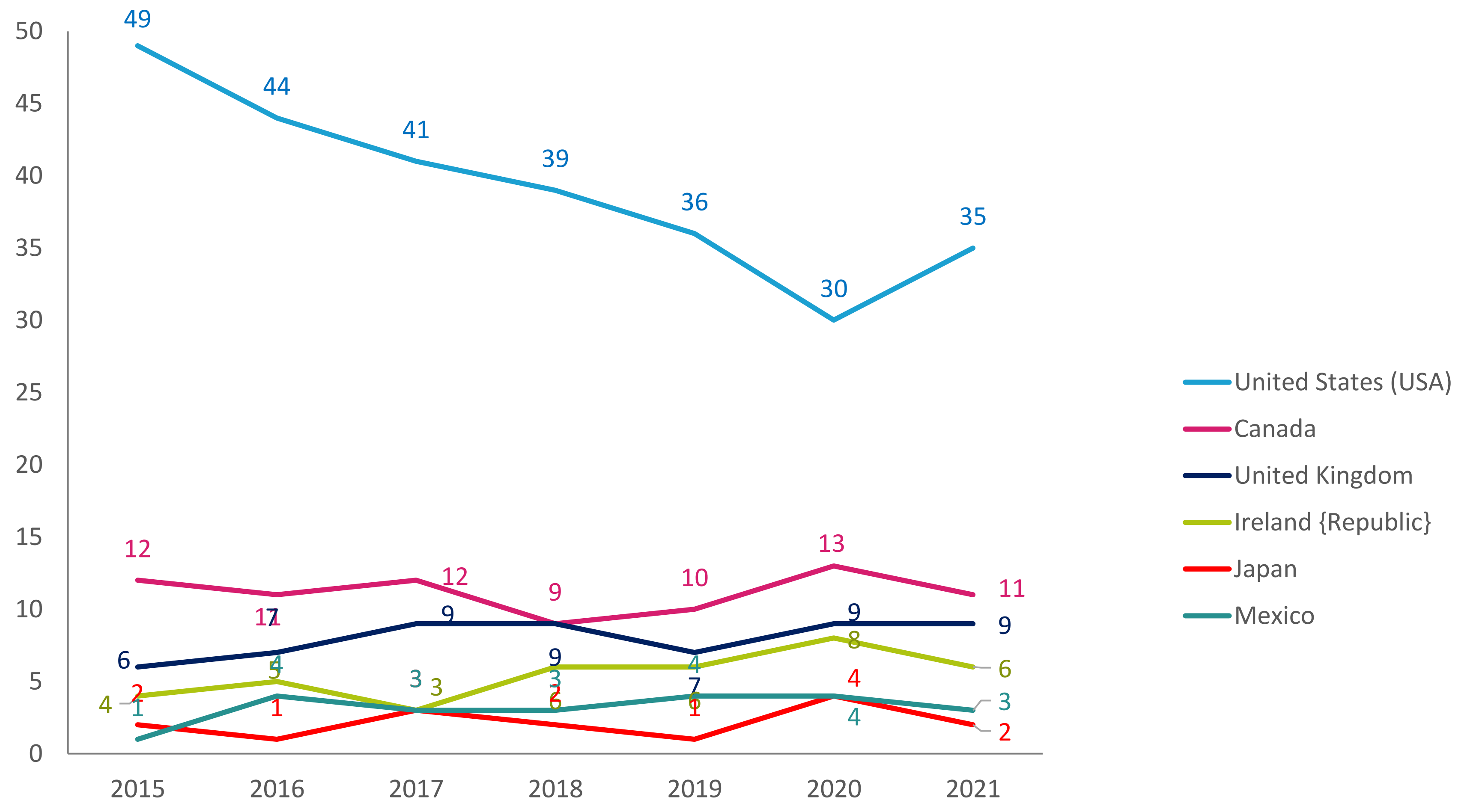


There has been an increase in once a week (20%) when compared to last year (15%) and a decrease in once a month (37%) compared to last year (43%).

How often do you use the International Registry system?

Sample Profile 2021

Base: All Users N - 309

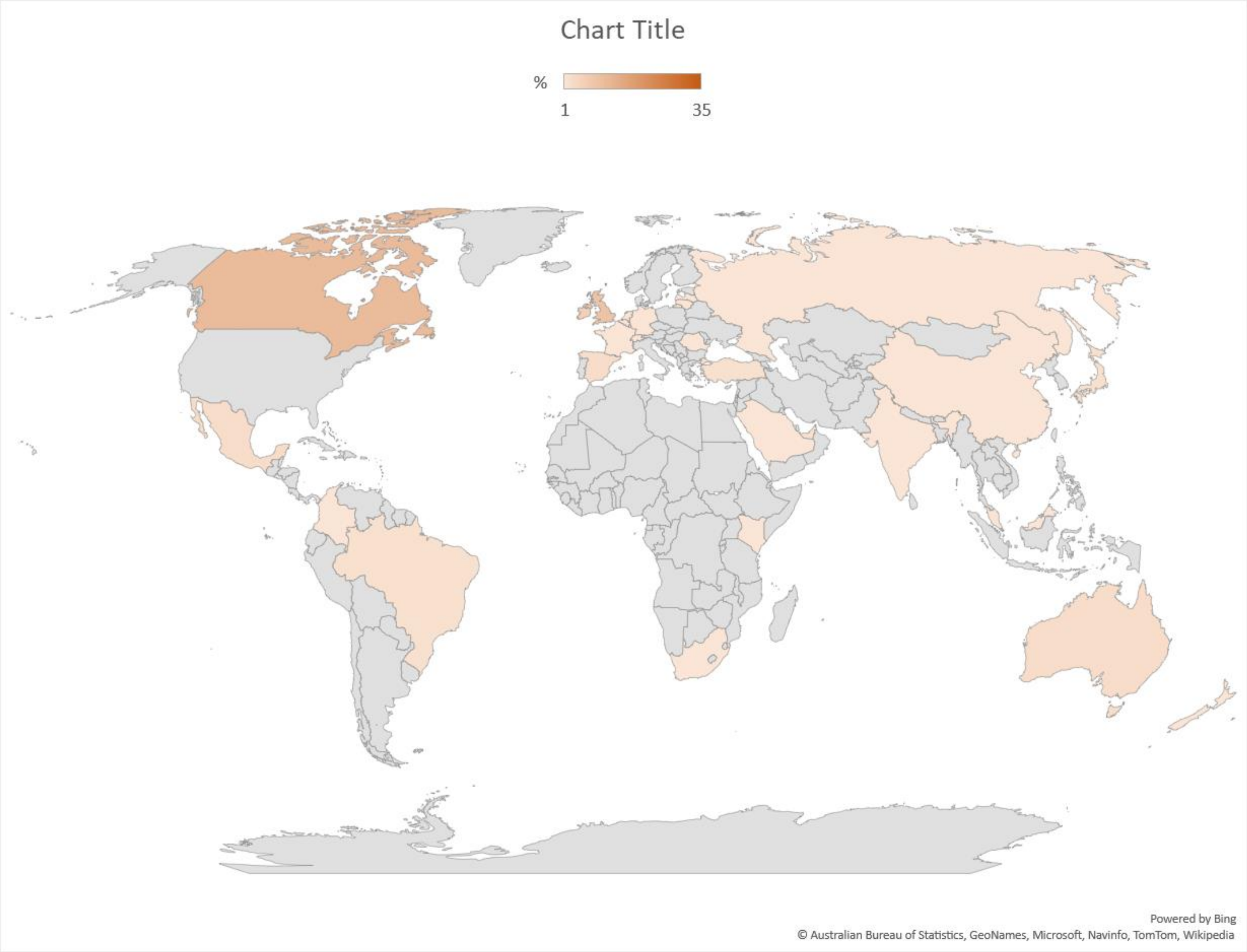


There is an increase in users based in the USA this year after a downward trend the last few years. It is currently back to 2019 levels (35%).

And in what country are you yourself based?

Sample Profile 2021

Base: All Users N - 309



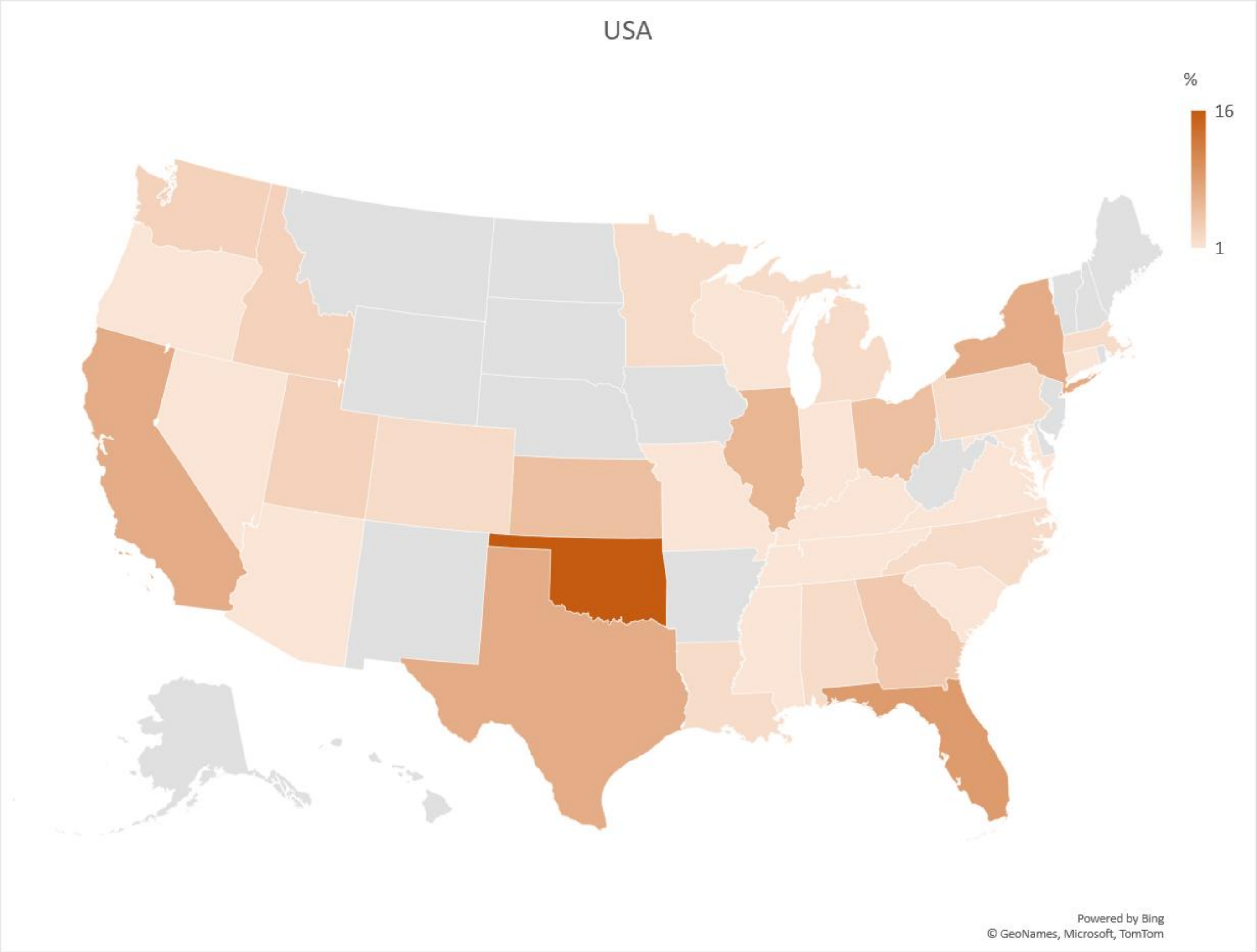
	2021	2020	2019	2018
United States (USA)	35	30	36	39
Canada	11	13	10	9
United Kingdom	9	9	7	9
Ireland {Republic}	6	8	6	6
Australia	3	2	3	2
Mexico	3	4	4	3
Singapore	3	3	1	1
Spain	3	2	3	2
Brazil	2	1	1	1
Japan	2	4	1	2
Turkey	2	1	1	0
United Arab Emirates	2	1	2	3
Belgium	1	1	0	0
China	1	3	4	2
Colombia	1	1	1	0
France	1	1	2	2
Germany	1	1	2	2
India	1	1	0	1
Kenya	1	1	1	1
Latvia	1	0	0	0
Lithuania	1	1	0	0
Luxembourg	1	1	2	2
Malaysia	1	0	1	1
Mauritius	1	0	0	0
Netherlands	1	0	0	0
New Zealand	1	0	0	0
Romania	1	0	1	1
Russian Federation	1	1	2	1
Saudi Arabia	1	0	0	0
South Africa	1	0	0	1
Switzerland	1	0	0	0

Users based in the USA now stand at 35%. (30% in 2020, 36% in 2019, 39% in 2018, 41% in 2017, 44% in 2016 and 49% in 2015).

And in what country are you yourself based?

Sample Profile 2021

Base: All USA Users N - 107



	2021	2020	2019
Oklahoma	16	19	15
Florida	9	11	4
California	7	5	10
New York	7	5	3
Texas	7	11	5
Illinois	6	2	4
Kansas	5	2	3
Ohio	5	1	1
Georgia	4	2	-
Idaho	3	2	1
Utah	3	2	3
Washington	3	5	2
Alabama	2	-	3
Colorado	2	2	-
Louisiana	2	-	1
Massachusetts	2	2	2
Michigan	2	4	1
Minnesota	2	-	2
North Carolina	2	2	3
Pennsylvania	2	2	3
Arizona	1	2	1
Connecticut	1	3	5
Indiana	1	-	1
Kentucky	1	-	-
Maryland	1	-	2
Mississippi	1	-	1
Missouri	1	-	1
Nevada	1	1	-
Oregon	1	-	1
South Carolina	1	2	1
Tennessee	1	1	2
Virginia	1	4	2
Wisconsin	1	1	1

Oklahoma continues to have the highest level of users. The proportion of users based in Texas is closer to 2019 levels this year after an increase last year, while there has been an increase in users based in Illinois and Ohio this year.

In what U.S. state are you yourself based?

Key Service Aspects

Key Service Aspects: Relative Contribution Towards Worth Of Registry To Business

(Pearson's Correlations) 2021

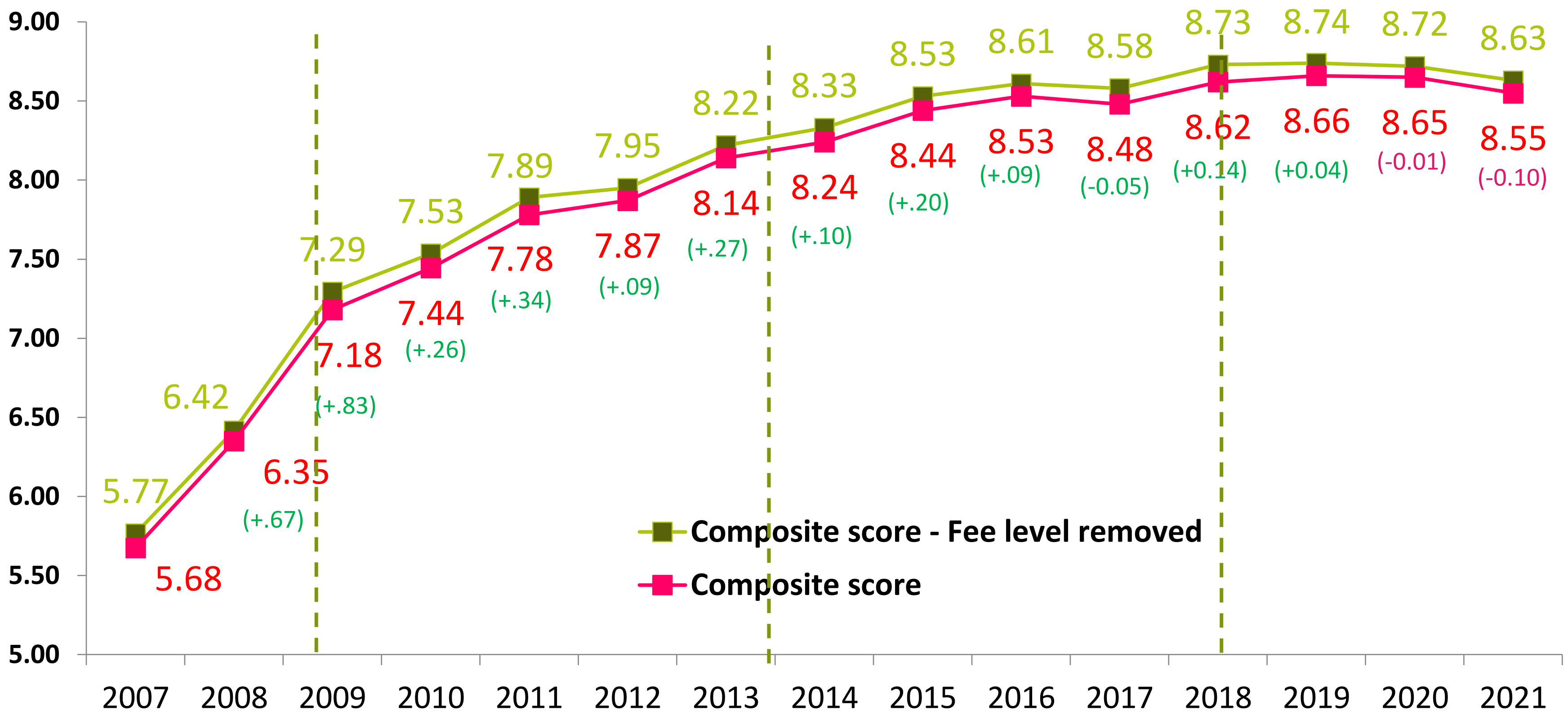
	2021	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011	2010	2009	2008	2007
Fit of Registry and business functionality	0.71	0.73	0.66	0.77	0.79	0.81	.71	0.78	0.75	0.81	0.76	0.78	0.83	0.8	n/a
Overall ease of use of the Registry	0.69	0.7	0.69	0.69	0.68	0.68	.62	0.7	0.64	0.73	0.64	0.73	0.67	0.67	0.71
Reliability of technical aspects of the Registry	0.63	0.61	0.60	0.65	0.47	0.60	.42	0.58	0.56	0.64	0.5	0.64	0.58	0.52	0.59
Level of fee charged	0.60	0.63	0.58	0.60	0.65	0.56	.49	0.62	0.63	0.65	0.6	0.69	0.74	0.7	0.67
Speed of Registry during use.	0.59	0.6	0.56	0.61	0.56	0.45	.41	0.6	0.54	0.62	0.45	0.59	0.56	0.56	0.57
Speed of approval for new Administrators/Users	0.56	0.52	0.50	0.44	0.57	0.41	.40	0.55	0.48	0.64	0.42	0.53	0.45	0.59	0.49
Quality of information sent to you from the Registry Officials	0.53	0.48	0.51	0.62	0.55	0.45	.46	0.51	0.59	0.56	0.55	0.62	0.57	0.52	0.56
Efficiency of resolution of queries by Registry Officials	0.51	0.54	0.49	0.43	0.54	0.56	.44	0.55	0.57	0.56	0.44	0.61	0.49	0.6	0.58
Efficiency of credit card transactions.	0.44	0.47	0.39	0.50	0.50	0.35	.43	0.5	0.5	0.49	0.37	0.45	0.5	0.42	0.37
Registry Officials' language skills	0.42	0.5	0.47	0.50	0.45	0.31	.37	0.42	0.49	0.49	0.42	0.44	0.36	0.35	0.36
Speed of refunds	0.40	0.63	0.60	0.56	0.50	0.56	.43	0.47	0.57	0.66	0.39	0.51	0.56	0.48	0.47
Availability of Registry Officials	0.38	0.46	0.55	0.43	0.58	0.57	.41	0.5	0.6	0.64	0.55	0.51	0.38	0.52	0.55
Technical knowledge of Registry Officials regarding the Registry.	0.35	0.5	0.52	0.49	0.53	0.46	.35	0.52	0.57	.47					

The fit of Registry with business functionality continues to be the most important definer of the perceived worth of the Registry, with ease of use remaining the second most important driver again this year. Speed of refunds has dropped back from third place in 2020 to 11th place this year. Reliability of technical aspects of the Registry, level of fee charged and speed of the registry during use are also very important.

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

Base: All Users N - 309

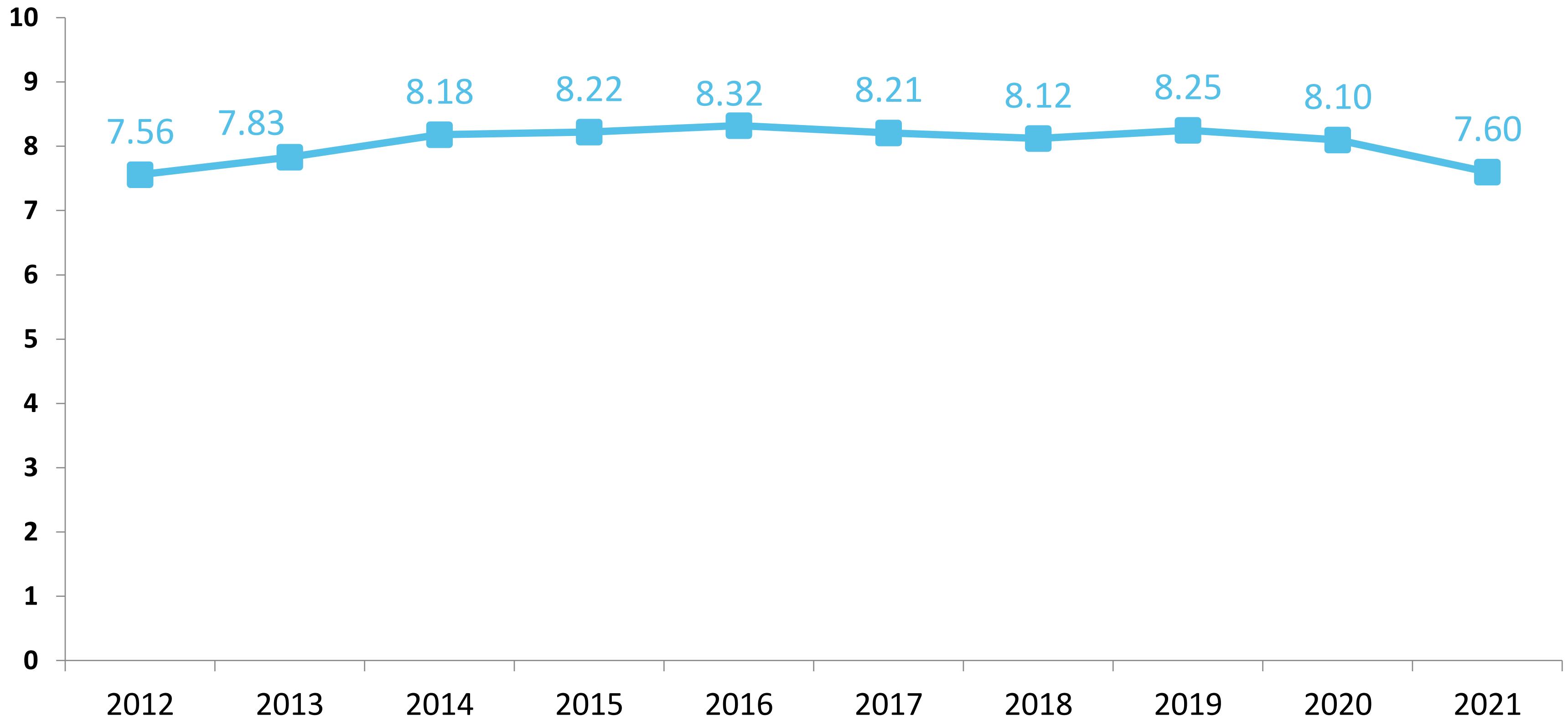


Although the overall weighted Registry experience rating has dipped slightly compared to last year, it is still at a remarkably high level of 8.63 out of a possible 10. As has been noted on previous surveys, this is an extremely high score for any B2B service, most of which struggle to reach the 8.0 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

Base: All Users N - 309

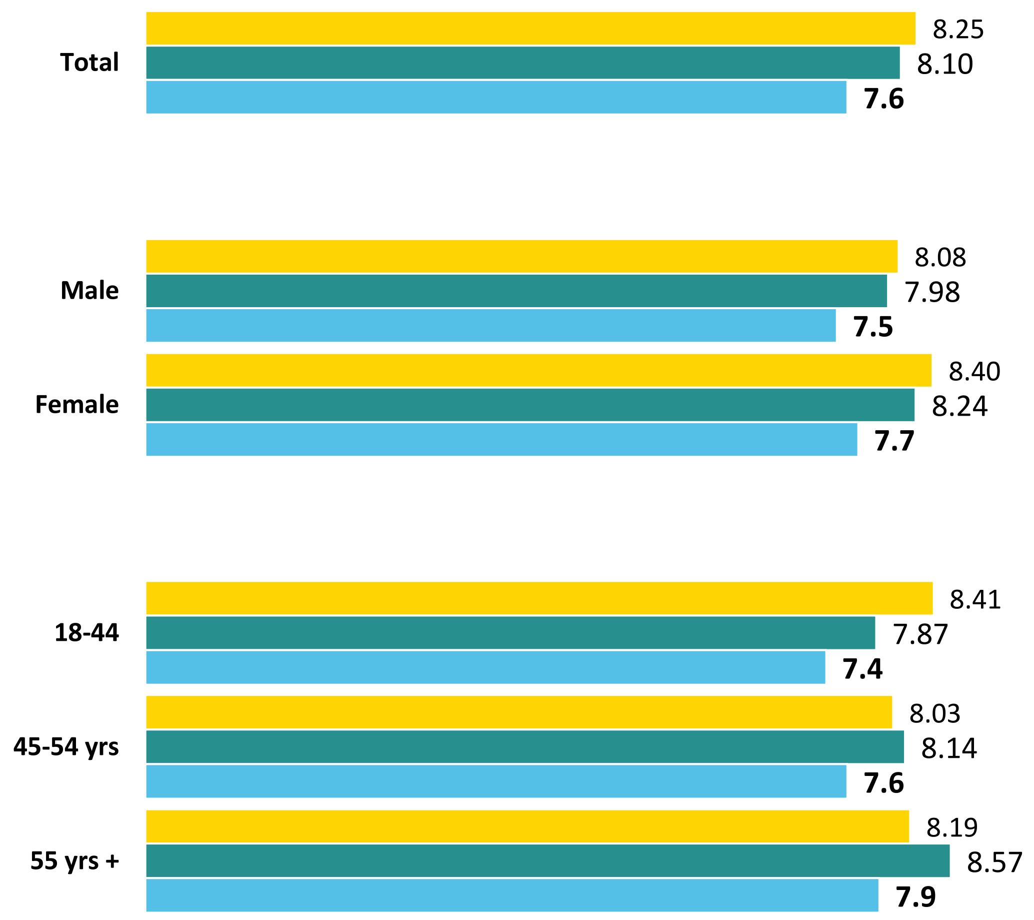


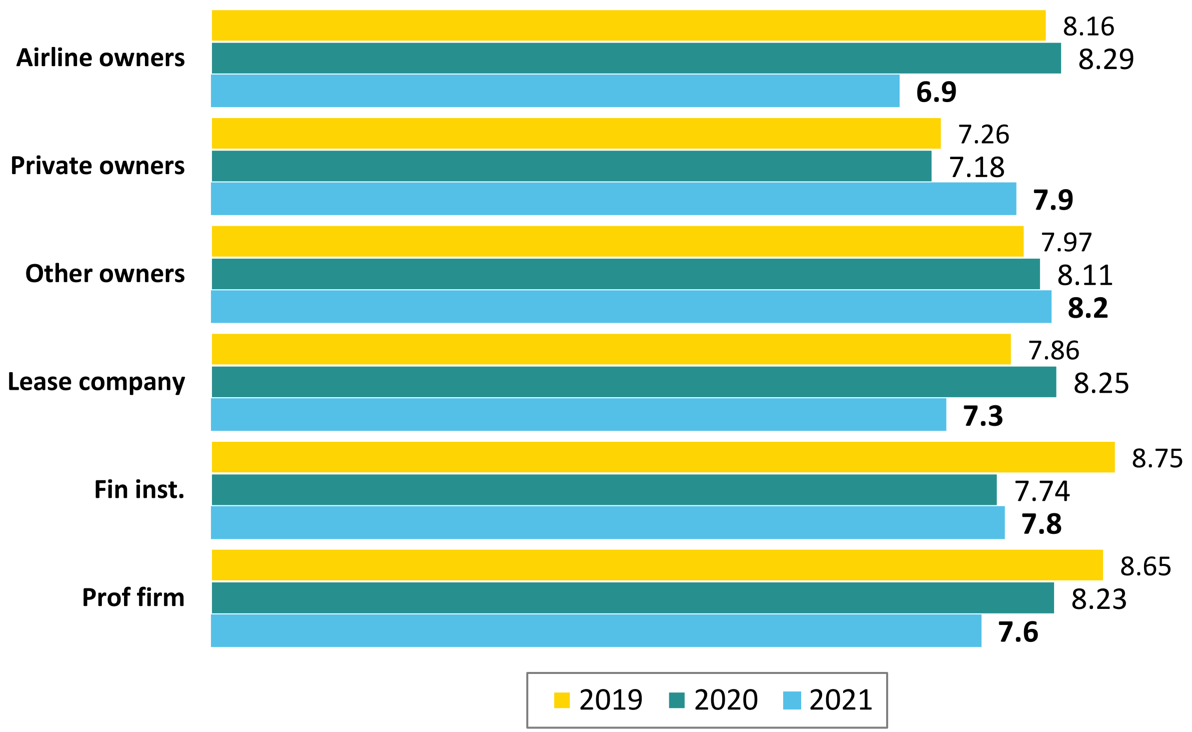
The Registry's overall satisfaction rating is 7.60 out of 10 which is down slightly this year but still strong.

Q.2 And taking everything into account, how would you rate your overall satisfaction with the Registry?

Overall Satisfaction with the Registry x Demographics

Base: All Users N - 309



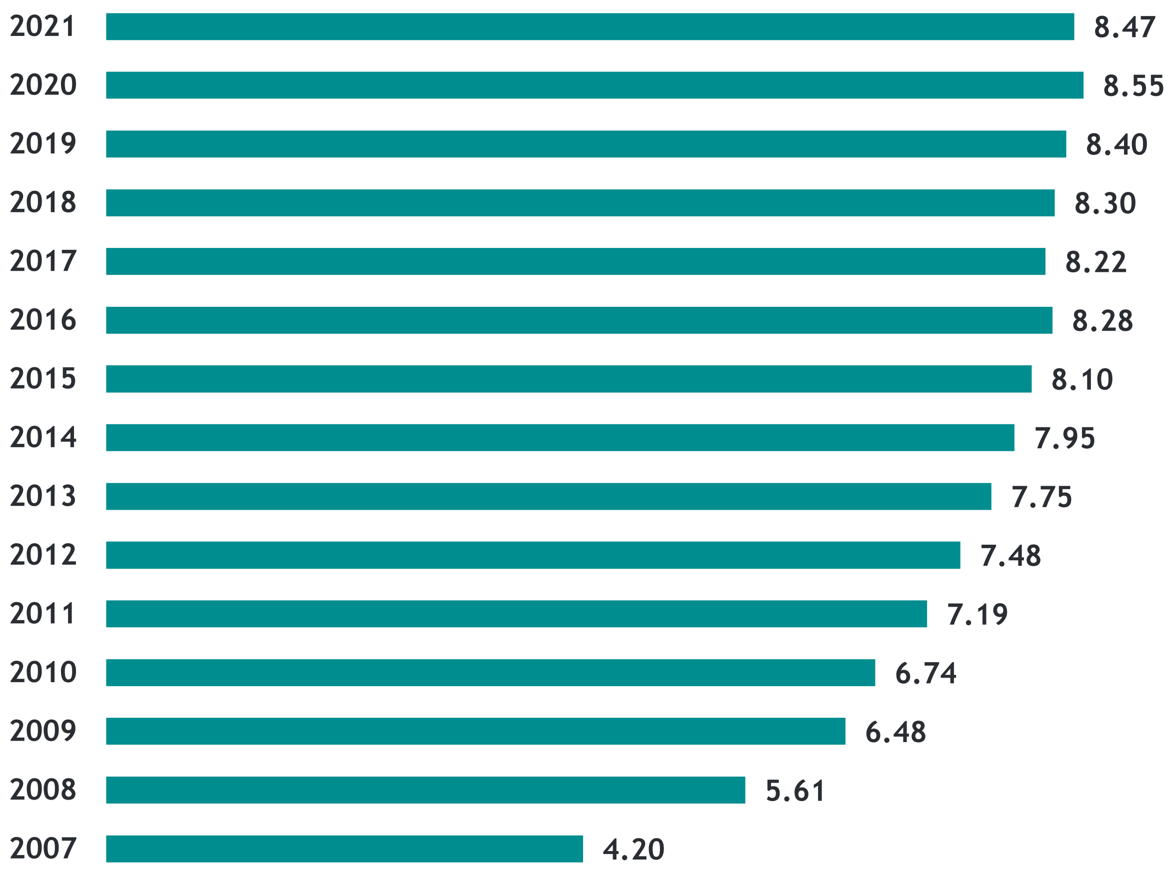


The overall satisfaction rating is highest amongst female users, those aged 55 years plus, private and other owners.

Q.2 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

Base: All Users N - 309



The perceived worth of the Registry to users' business is at it's second highest level to date at 8.47 out of 10 after a record high of 8.55 last 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.

Key Service Aspects:

Overall Performance Rating (10 Point Scale)

Significant increase: 2021-2020
Significant decrease: 2021-2020

Ranked on Most Important	Mean Performance Rating												
	2021	2020	2019	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.	8.08	8.28	7.93	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.	7.87	8.04	7.91	7.8	7.73	8	7.88	7.43	7.26	6.89	7.01	6.64	6.52
Reliability of technical aspects of the Registry.	8.62	8.60	8.53	8.38	8.23	8.46	8.42	8.28	7.79	7.79	7.89	7.3	7.22
Level of fee charged.	7.67	7.89	7.78	7.59	7.42	7.65	7.48	7.31	7.15	6.79	6.64	5.51	6.18
Speed of Registry during use.	8.45	8.49	8.46	8.26	8.2	8.31	8.23	8.16	7.9	7.59	7.73	7.17	7.1
Speed of approval for new Administrators/Users	8.88	8.91	9.05	8.98	8.93	8.91	8.64	8.42	8.36	8.17	8.27	8.09	7.92
Quality of information sent to you from the Registry Officials	9.03	9.05	9.19	8.99	8.99	8.98	8.84	8.72	8.47	8.29	8.32	8.11	7.93
Efficiency of resolution of queries by Registry Officials	8.85	8.98	9.13	9.11	8.95	8.93	8.88	8.63	8.44	8.23	8.06	7.82	7.61
Efficiency of credit card transactions.	8.86	9.10	9.1	8.88	9.02	9.06	9.04	8.91	8.77	8.32	8.48	8.22	8.28
Registry Officials' language skills	9.34	9.20	9.35	9.27	9.24	9.27	9.25	9.04	8.95	8.91	8.96	8.76	8.73
Speed of refunds	8.95	8.81	8.95	8.83	8.56	8.52	8.42	8.39	8.17	7.74	8.14	7.01	6.69
Availability of Registry Officials	8.91	8.90	9.17	8.86	8.95	8.95	8.86	8.57	8.38	8.02	8.08	7.64	7.41
Technical knowledge of Registry Officials regarding the Registry	8.98	9.04	9	9.01	8.92	8.95	8.91	8.69	8.57	8.38	8.4	8.2	7.86

Registry official's language skills and speed of refunds have significantly improved this year and are back to 2019 levels, while the fit of the Registry with business functionality and overall ease of use of the Registry have significantly decreased this year after a record high last 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.

Key Service Aspects:

Overall Performance Rating (10 Point Scale)

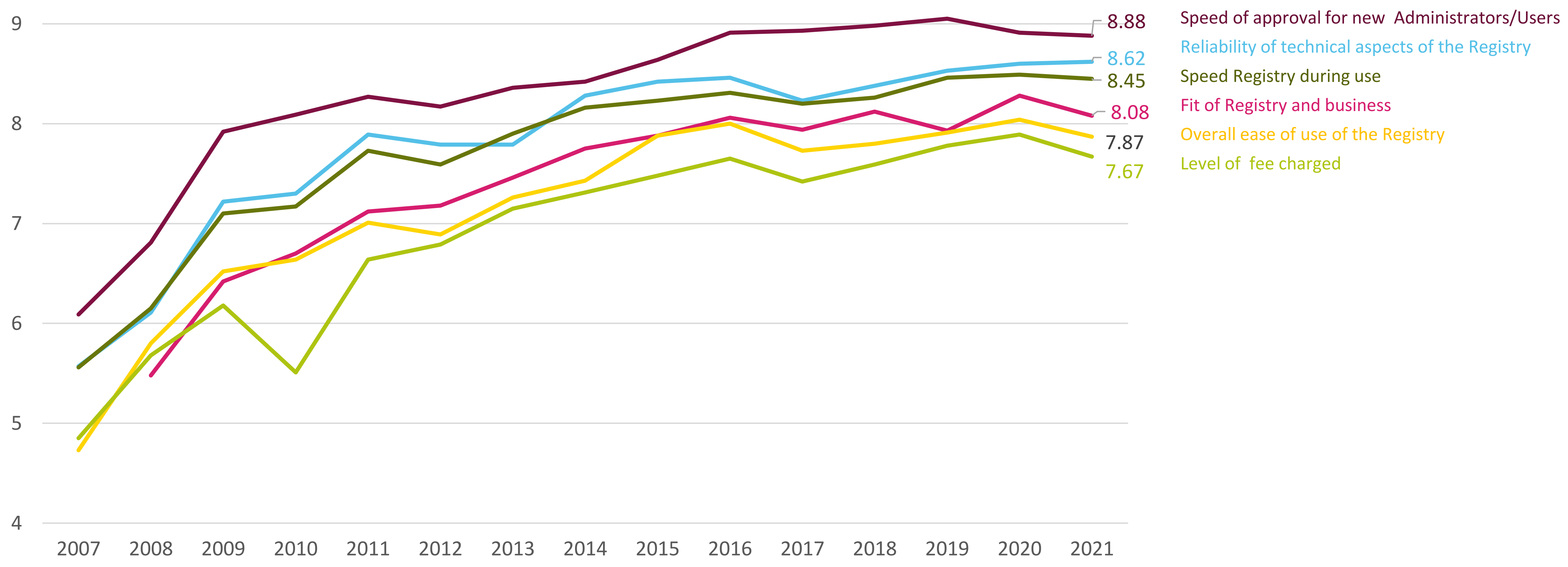
Ranked on Most Important	Mean Performance Rating							% Scoring 1-2							% Scoring 9-10							% of No Opinion							YOY CHANGE 2021 vs 2020
	2021	2020	2019	2018	2017	2016	2015	2021	2020	2019	2018	2017	2016	2015	2021	2020	2019	2018	2017	2016	2015	2021	2020	2019	2018	2017	2016	2015	
MOST IMPORTANT																													
Fit of Registry and business functionality	8.08	8.28	7.93	8.12	7.94	8.06	7.88	3	2	3	2	6	5	2	50	52	47	52	51	49	46	6	5	2	2	5	2	5	-0.20
Overall ease of use of the Registry	7.87	8.04	7.91	7.8	7.73	8	7.88	4	2	4	4	6	2	3	47	47	44	44	45	47	45	2	1	0	-	1	1	1	-0.17
Reliability of technical aspects of the Registry	8.62	8.6	8.53	8.38	8.23	8.46	8.42	1	1	0	2	2	2	1	57	56	54	54	48	53	54	7	7	9	7	9	9	8	+0.02
Level of fee charged	7.67	7.89	7.78	7.59	7.42	7.65	7.48	3	1	1	2	4	2	2	40	40	39	37	33	36	33	10	11	8	6	9	6	7	-0.22
Speed of registry during use	8.45	8.49	8.46	8.26	8.2	8.31	8.23	1	1	2	3	3	3	1	58	58	60	55	52	53	52	3	2	1	0	1	1	2	-0.04
Speed of approval for new Administrators/Users	8.88	8.91	9.05	8.98	8.93	8.91	8.64	0	0	1	0	0	0	1	61	62	68	66	59	65	56	14	12	10	9	16	10	12	-0.03
Quality of information sent to you by the Registry Officials	9.03	9.05	9.19	8.99	8.99	8.98	8.84	0	1	0	0	1	1	1	68	66	73	71	68	71	67	6	7	7	2	7	4	3	-0.02
Efficiency of resolution of queries by Registry Officials	8.85	8.98	9.13	9.11	8.95	8.93	8.88	1	1	1	1	0	0	0	65	69	76	74	68	68	66	10	8	4	6	8	6	4	-0.13
Efficiency of credit card transactions	8.86	9.10	9.10	8.88	9.02	9.06	9.04	2	0	1	1	1	0	1	67	70	70	67	71	70	69	8	10	8	7	9	8	10	-0.24
Registry Officials language skills	9.34	9.2	9.35	9.27	9.24	9.27	9.25	0	2	0	0	0	0	0	70	69	75	75	70	72	75	15	14	8	9	14	14	10	+0.14
Speed of refunds	8.95	8.81	8.95	8.83	8.56	8.52	8.42	0	1	0	0	0	0	0	31	32	36	34	19	20	20	56	56	51	49	67	69	65	+0.14
Availability of Registry Officials	8.91	8.9	9.17	8.86	8.95	8.95	8.86	1	2	0	2	0	0	0	65	62	76	71	65	67	68	9	9	3	5	8	7	5	+0.01
Technical knowledge of Registry Officials regarding the Registry	8.98	9.04	9	9.01	8.92	8.95	8.91	1	1	0	2	0	0	0	64	64	70	70	63	63	66	12	11	5	6	12	11	6	-0.06
LEAST IMPORTANT																													

Levels of satisfaction with all aspects have dipped slightly this year with the exception of reliability of technical aspects of the Registry, speed of refunds and availability of Registry officials. However, it is important to note that despite this dip, satisfaction levels still remain very high.

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 (Ten Point Scale) – Top 6 Criteria

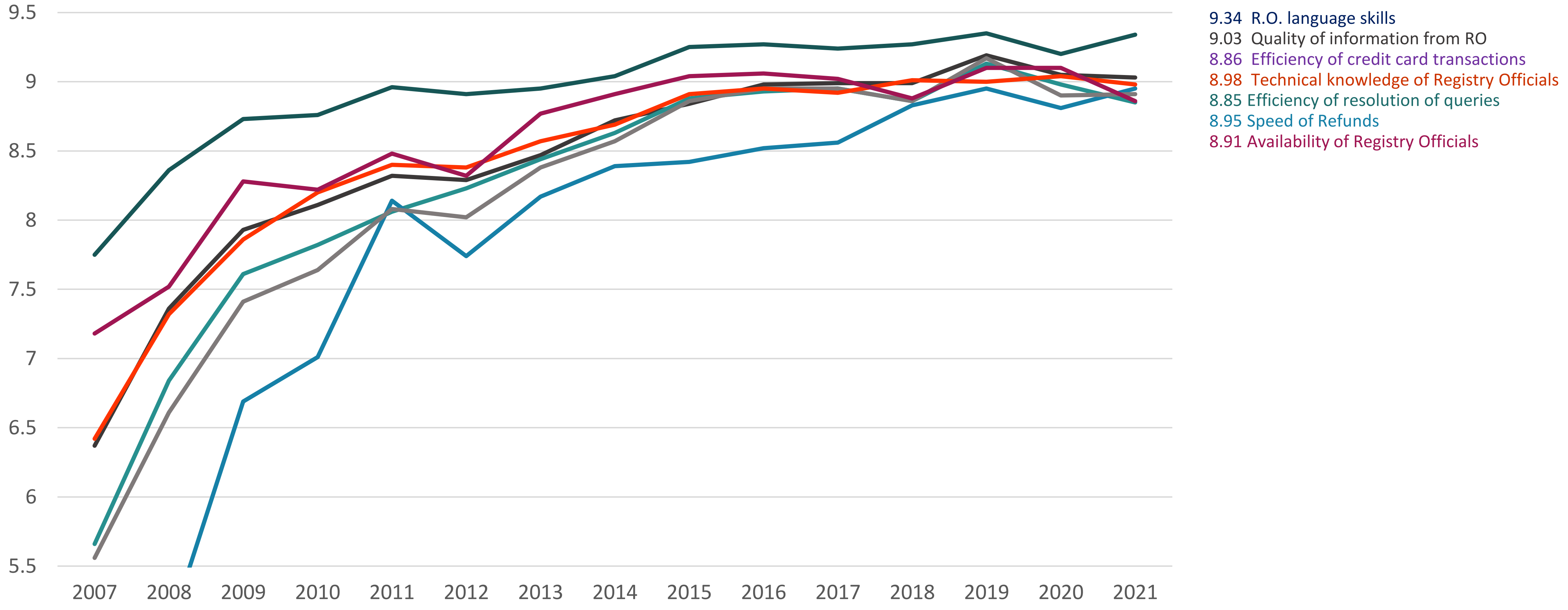


Overall satisfaction with four of the top six criteria remains at 8 or higher on a ten point scale.

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 (Ten Point Scale) – Remaining Aspects



Two out of the remaining seven service aspects exceed a score of 9 out of 10, with the balance not far off achieving 9 out of 10 as well.

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.

Satisfaction With The Registry x Key User Groupings

Ten Point Rating Scale

Base: All Users N - 309

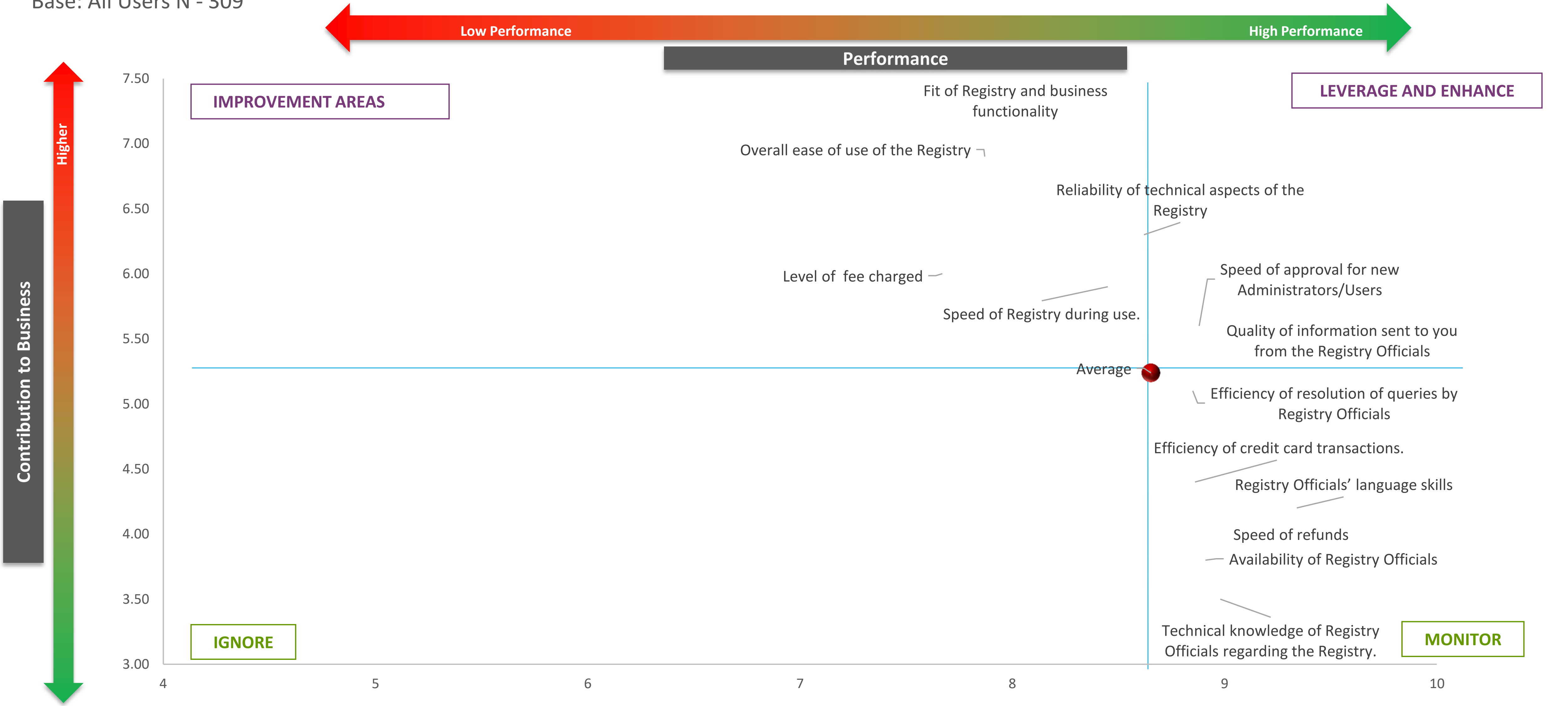
	Total	Gender		Age			Organisation					
		Male	Female	18-44	45-54 yrs	55 yrs +	Airline owners	Private owners	Other Owner	Lease company	Fin inst.	Prof firm
The degree to which the functionality of the Registry fits with the way your business functions.	8.08	7.92	**8.31**	7.89	**8.42**	8.13	7.42	8.15	8.03	8.05	7.76	**8.48**
Overall ease of use of the Registry.	7.87	7.63	**8.20**	7.74	**8.12**	7.89	7.34	7.70	7.73	7.82	7.56	**8.30**
Reliability of technical aspects of the Registry.	8.62	**8.63**	8.61	8.43	8.60	**9.03**	8.55	**8.79**	8.69	8.59	**8.78**	8.56
Level of fee charged.	7.67	7.48	**7.95**	7.37	7.90	**8.06**	6.92	7.67	7.88	7.25	7.91	**8.01**
Speed of Registry during use.	8.45	8.41	**8.51**	8.21	8.54	**8.85**	8.42	8.40	**8.65**	8.37	8.54	8.41
Speed of approval for new Administrators/Users	8.88	8.63	**9.20**	8.78	**8.97**	**8.97**	8.81	8.89	8.85	8.57	**9.03**	8.96
Quality of information sent to you from the Registry Officials	9.03	8.93	**9.17**	8.92	9.11	**9.18**	8.88	**9.15**	9.14	9.08	9.12	9.00
Efficiency of resolution of queries by Registry Officials	8.85	8.79	**8.91**	8.66	8.99	**9.07**	8.47	8.79	**9.00**	8.89	8.91	8.94
Efficiency of credit card transactions.	8.86	8.80	**8.93**	8.75	8.70	**9.21**	8.89	**9.16**	9.12	8.92	8.85	8.69
Registry Officials' language skills	9.34	9.26	**9.45**	9.22	**9.46**	9.44	9.20	**9.78**	9.33	9.56	9.04	9.32
Speed of refunds	8.95	8.74	**9.26**	8.79	8.83	**9.47**	8.77	**9.27**	8.93	9.00	8.69	9.00
Availability of Registry Officials	8.91	**8.94**	8.86	8.82	8.95	**9.04**	8.60	**9.30**	9.29	8.89	9.22	8.76
Technical knowledge of Registry Officials regarding the Registry	8.98	8.94	**9.03**	8.88	**9.17**	8.97	8.57	9.30	**9.39**	8.79	9.15	8.97
Overall worth of the Registry to my organisation/business.	8.47	8.16	**8.91**	8.49	8.34	**8.57**	7.73	7.65	8.11	8.72	8.56	**8.91**

In general, satisfaction is higher among females, those aged 55+, private owners and professional firms.

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.

Aviareto: Strategic Performance Matrix 2021

Base: All Users N - 309

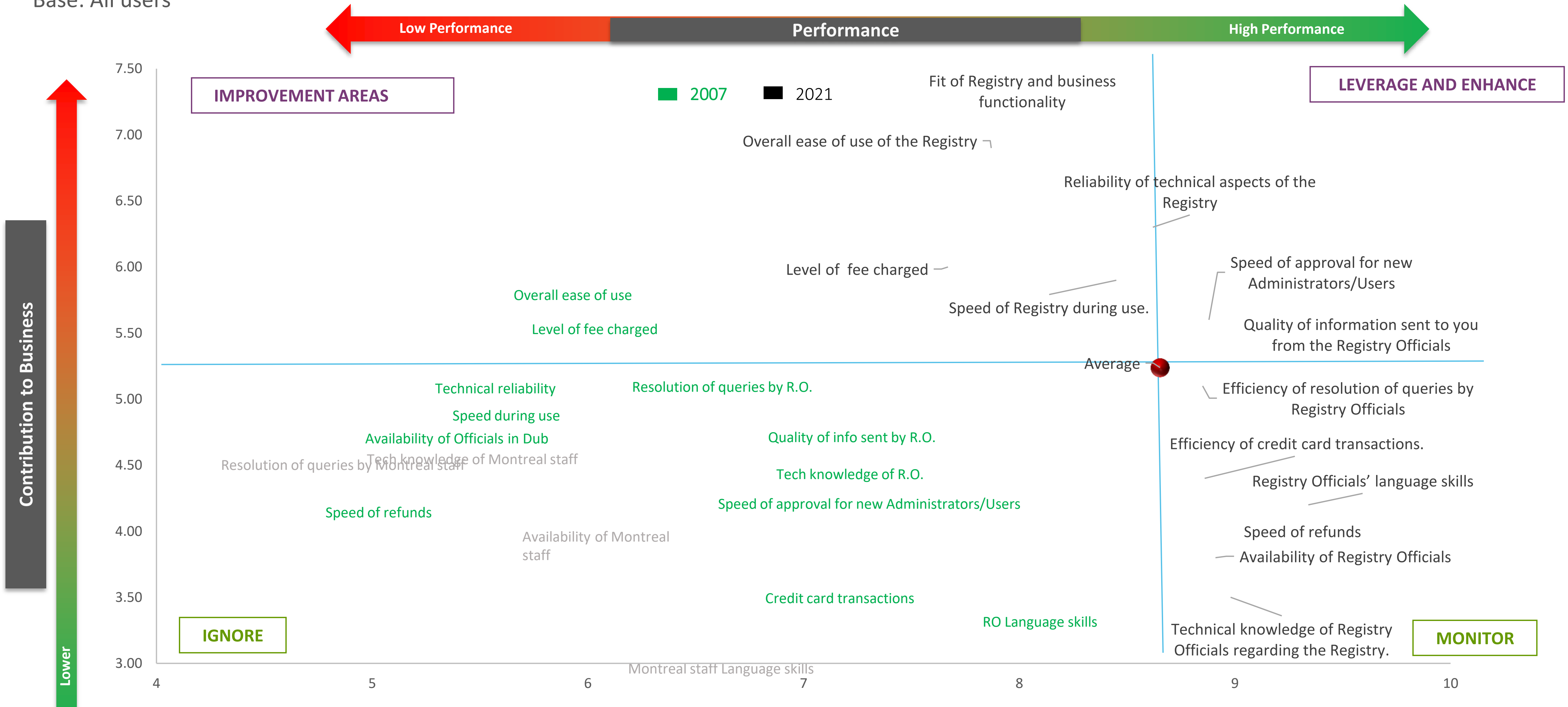


As was the case last year, there are very few aspects of service which require critical or remedial attention .

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.

Aviareto: Strategic Performance Matrix 2021 vs 2007

Base: All users

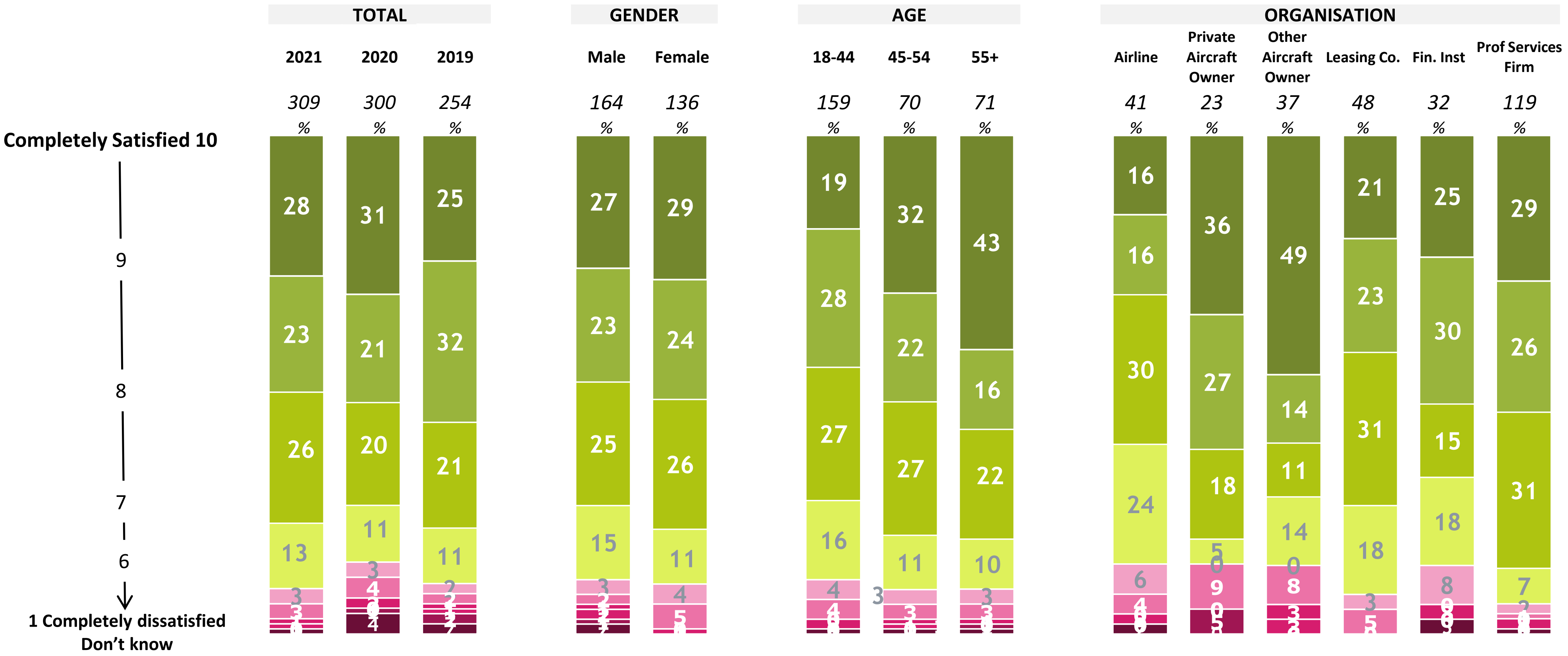


In superimposing the 2021 data on the original 2007 strategic performance map, we can see the extraordinary extent of the user improvements made over the intervening years.

Overall Satisfaction with Registry

Overall Satisfaction Ratings with the Registry

Base: All Users N - 309



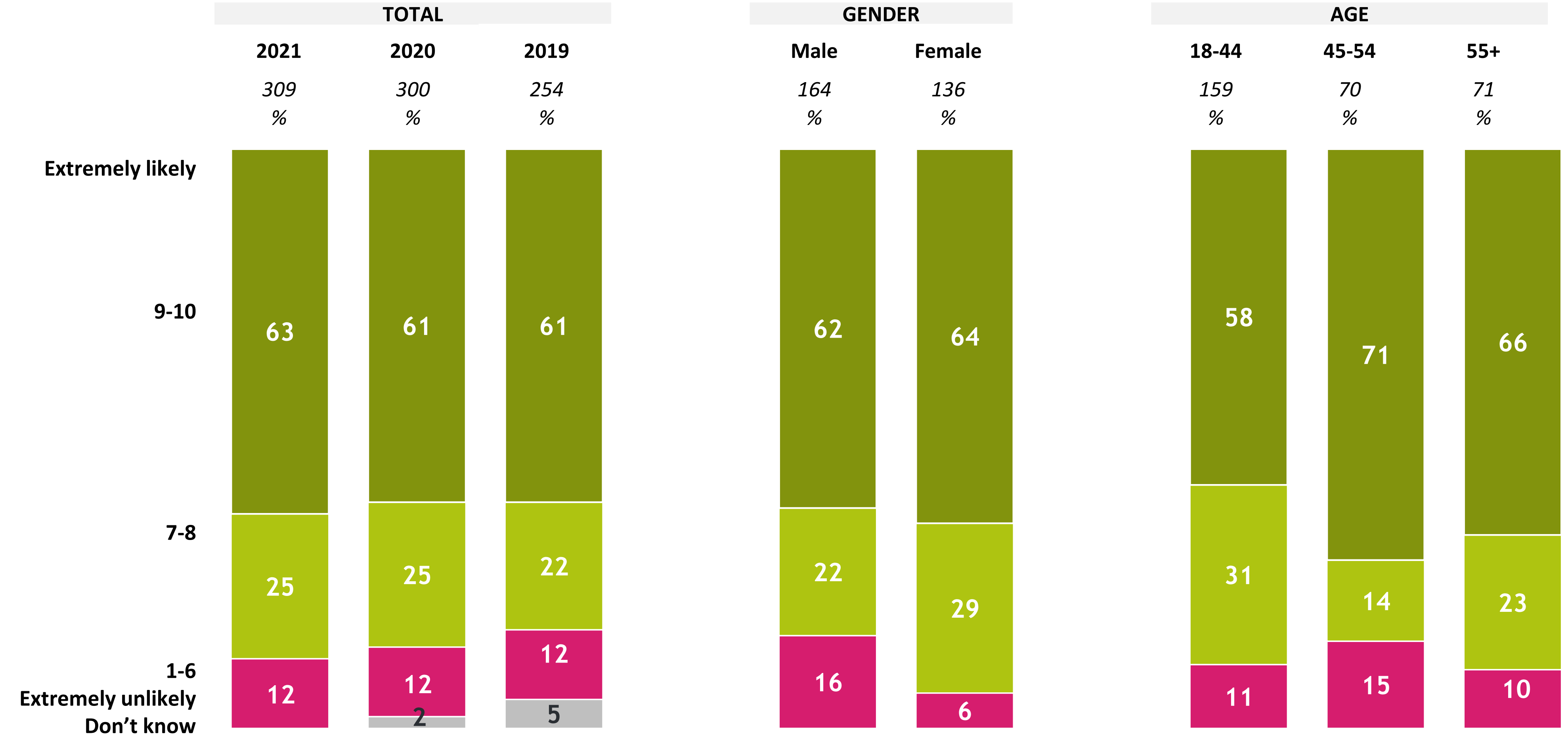
	2021	2020	2019	Male	Female	18-44	45-54	55+	Airline	Private Aircraft Owner	Other Aircraft Owner	Leasing Co.	Fin. Inst	Prof Services Firm
Top 2 Score (9-10)	51	53	57	50	53	47	53	58	32	64	62	44	55	55
Mid (7-8)	39	32	33	40	37	42	38	32	54	23	24	49	33	39
Low (1-6)	10	15	10	10	9	10	9	9	14	14	14	8	13	6
Mean	7.60	8.10	8.25	7.5	7.7	7.4	7.6	7.9	6.9	7.9	8.2	7.3	7.8	7.6

Overall satisfaction with the Registry has dipped slightly this year to 7.60 out of 10 compared with 8.10 last year. Satisfaction is highest among other aircraft owners, private aircraft owners and those aged 55+.

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

Base: All Users N - 309



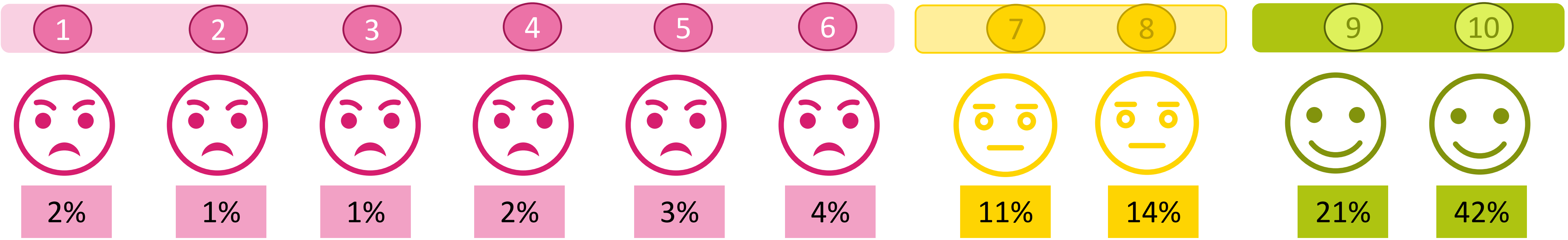
	2021	2020	2019	Male	Female	18-44	45-54	55+
NPS Score	**+51**	**+49**	**+49**	**+46**	**+58**	**+47**	**+56**	**+56**
Mean score	**8.50**	**8.50**	**8.53**	8.3	8.8	8.4	8.5	8.6

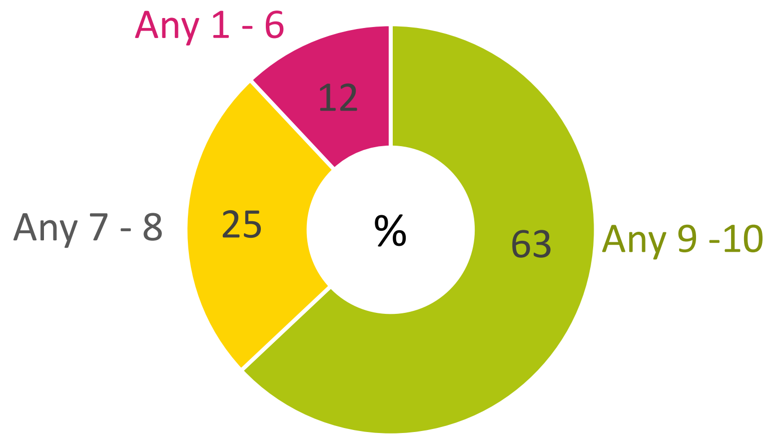
The Registry Net Promoter Score (NPS) remains very high +51. The NPS scores is highest among females and those aged 45+.

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?

Likelihood to Recommend Registry

Base: All Users N - 309





	9 -10	7 - 8	1 - 6	NPS	Mean
Airline	44%	32%	24%	+20%	7.7
Private	68%	18%	14%	+54%	8.2
Owner	68%	14%	19%	+49%	8.4
Lease Company	64%	28%	8%	+56%	8.7
Financial Inst.	57%	35%	8%	+49%	8.4
Professional Firm	70%	22%	7%	+63%	8.9

Overall Mean Score

(Scale of 1 to 10)

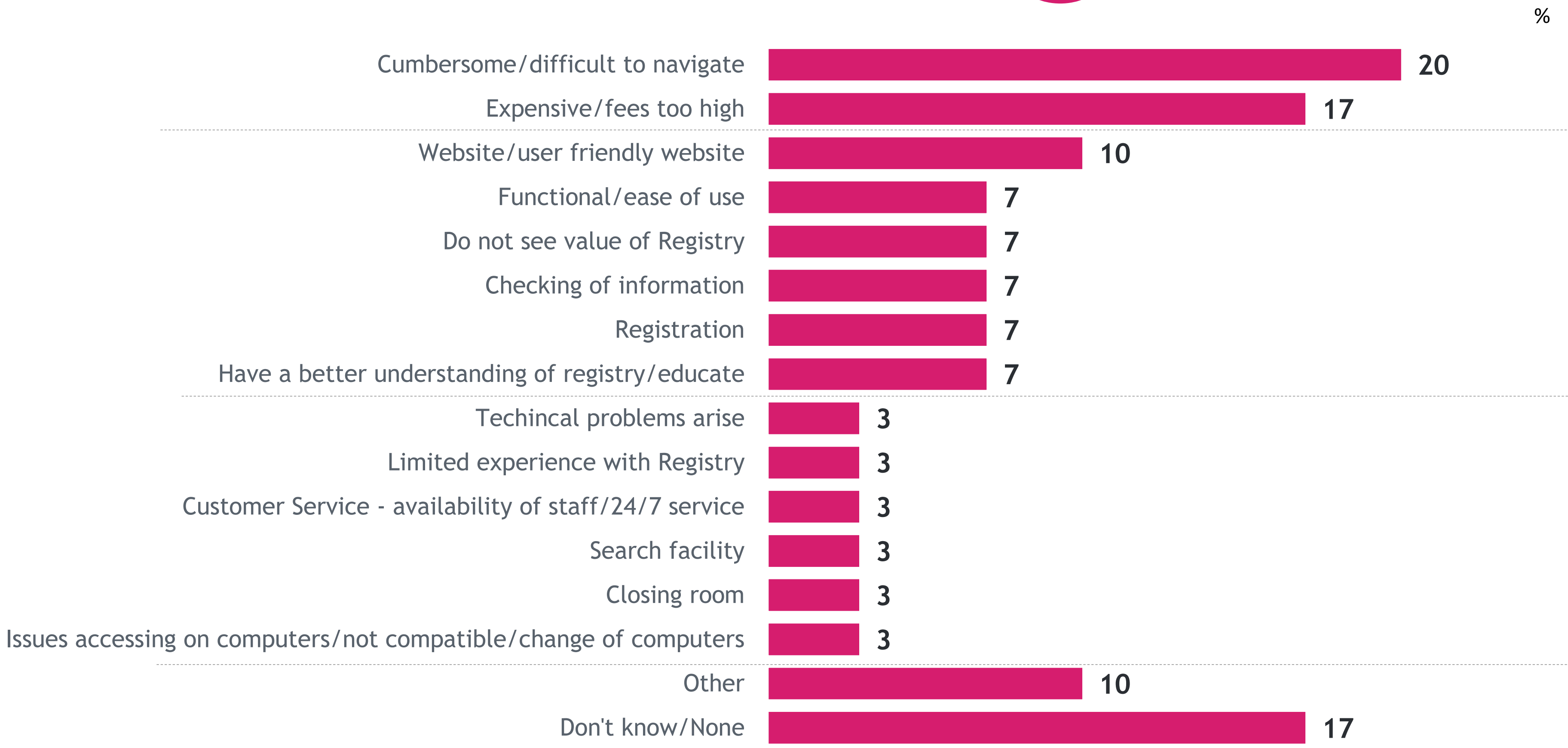
8.5

The Registry NPS mean score remains the same as last year at a high of 8.5. When we look at NPS by organisation, it's higher among professional firms, private and other aircraft owners.

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?

Reasons for Score 1-6

Base: All respondents scoring 1 to 6 N – 30*



Caution low base size

The minority of users who fall into the Detractor segment continue to find the Registry cumbersome/difficult to navigate or feel the fees are too high.

Q.4a What specific aspects of the Registry do you feel need to be enhanced or improved upon?

Reasons for Score 7-10

Base: All respondents scoring 7 to 10 N – 279

**Caution low base size*

Those that are particularly happy with the Registry identify the search facility, the service with the Registry in general and availability of staff/44/7 service as the aspects that work particular well.

Q.4b What specific aspects of the Registry do you feel work particularly well?

Impact of Covid 19 on Satisfaction Levels

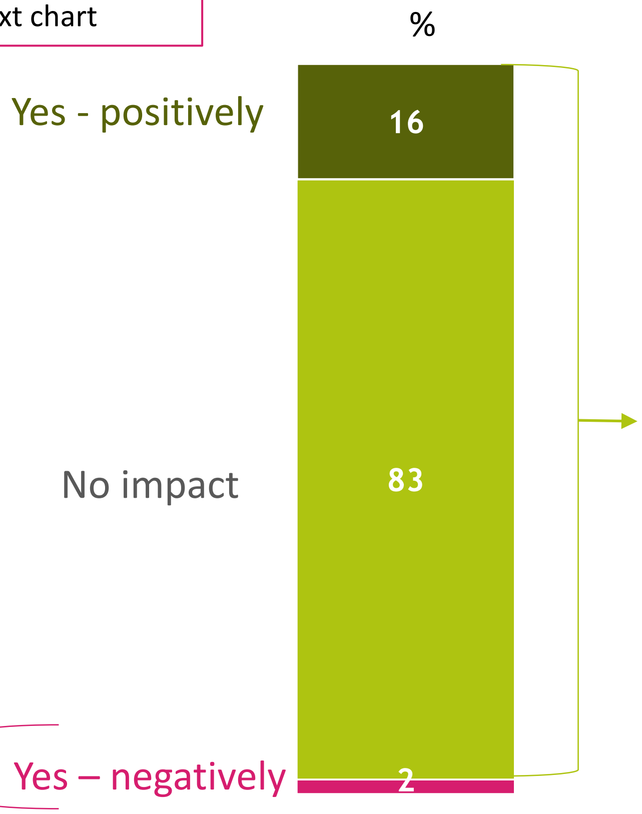
Base: All Users N - 309

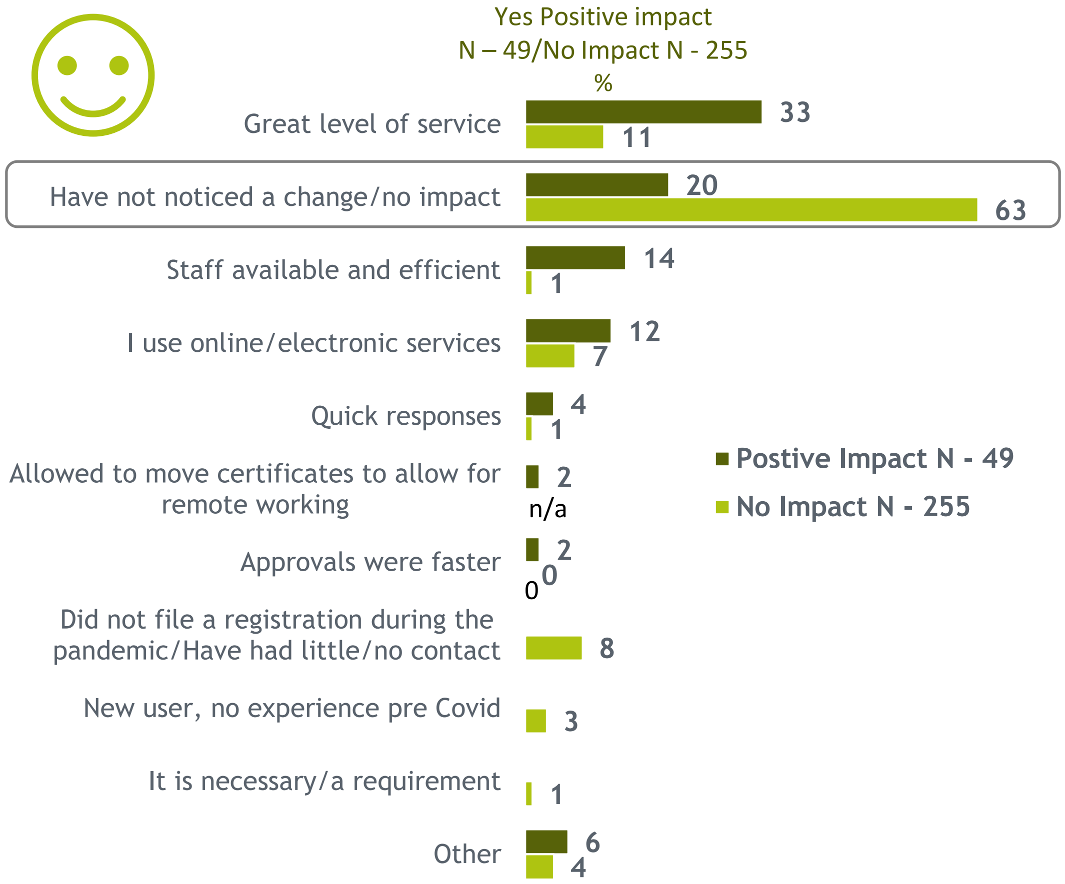
Often respondents who said they had been negatively impacted actually gave positive verbatim commentary see next chart

Yes Negative impact
N – 5*

Yes – negative impact (2%)	Total
	5*
UNWTD	No.
Great level of service	1
Staff available and efficient	1
Quick responses	1
Allowed to move certificates to allow for remote working	1
IR move to cloud but didn't happen due to covid	1
Approvals took a little longer	1

*Caution extremely low base; data shown as raw numbers





The vast majority (83%) of Registry users report that there has been no impact on their satisfaction with and/or likelihood to recommend the Registry due to the Registry's performance during the pandemic, while 16% report that their satisfaction/likelihood to recommend has been positively impacted. Only 2% report that their satisfaction/likelihood to recommend has been negatively impacted. Those positively disposed praised a great level of service.

Q.3b Has your satisfaction with and/or likelihood to recommend the registry been impacted by their performance during the Covid-19 pandemic?
Q.3c Why do you say that?

Impact of Covid 19 on Satisfaction Levels - verbatim

Base: All Users N - 309

Yes Positive impact
N – 49

"

Contrasting with the national registries that have been shut down or otherwise not readily available, your registry has been almost always available and very responsive. Thanks.

The staff is always ready to help and answer questions. No problem with delays or waiting.

Migration of accounts handled well during pandemic.

The registry worked perfectly fine throughout the pandemic, which helped my business.

System has consistently shown to be reliable.

They are always available and always cheerful, even in the wee small hours (I am in Australia - terrible time zone difference).

Use of remote support and control by computer link is a benefit when travel restrictions are present.

No Impact N - 255
%

We aren't aware of any difference in Registry's service during the COVID-19 pandemic.

Mostly I'm using the registry searches. They are completely automatic. No differences there because of the pandemic. Haven't noticed any impacts either.

No change pre or post covid. Usage is the same.

The provisions of the Cape Town Convention apply regardless of COVID

The registry has continued to operate as necessary for our business purposes.

Since the registry has always been virtual, I have seen no effect.

No impact as the IR has continued to meet expectations during COVID19.

For us it's business as usual with or without Covid

Yes Negative impact
N – 5*

Approvals took a little longer to be processed.

My access is to a certificate tied to the desktop in my office which, during remote working, I have been only periodically able to access so I have had to rely on colleagues to assist. However, I understand this will soon no longer be an issue once the registry changes to the cloud system?

We were looking forward to IR's move to cloud during 2020 so that it can be operated remotely but it did not happen.

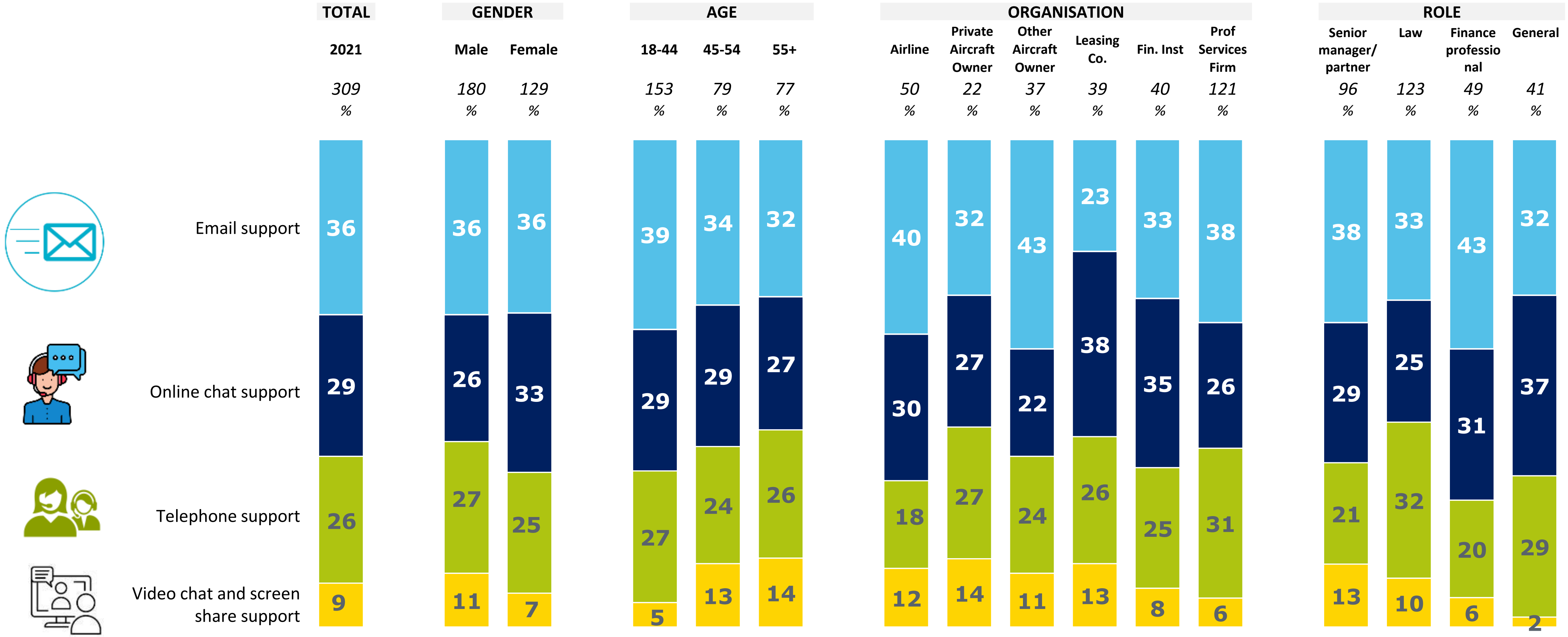
The registry has done a great job of remaining available and responsive through the pandemic.

Good response

Q.3b Has your satisfaction with and/or likelihood to recommend the registry been impacted by their performance during the Covid-19 pandemic?
Q.3c Why do you say that?

Preferred Support Channel x Demographics

Base: All Users N - 309

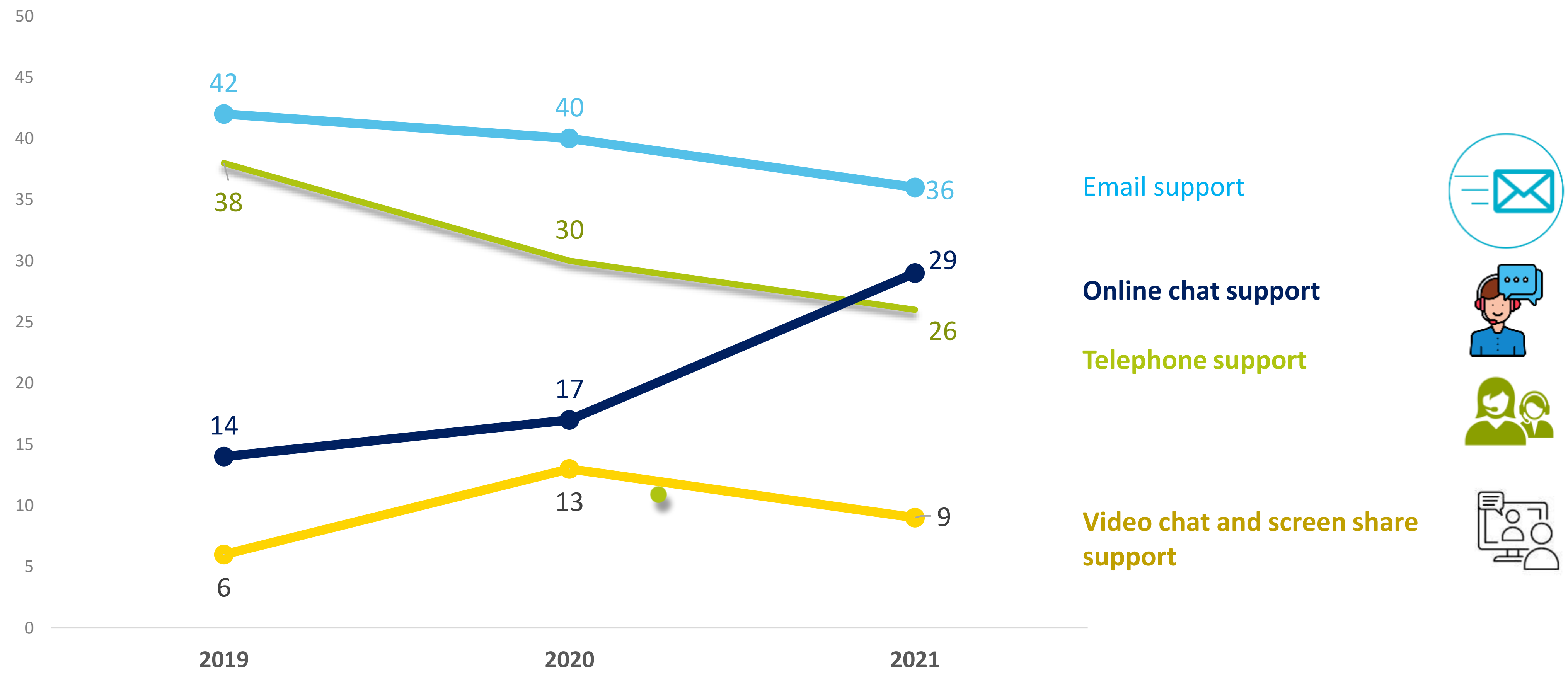


Most prefer email support as the channel used for Registry customer support, followed by online chat support, telephone support and lastly video chat/screen share support.

Q.6 Which one of the following channels would you most prefer for Registry customer support?

Preferred Support Channel

Base: All Users N - 309

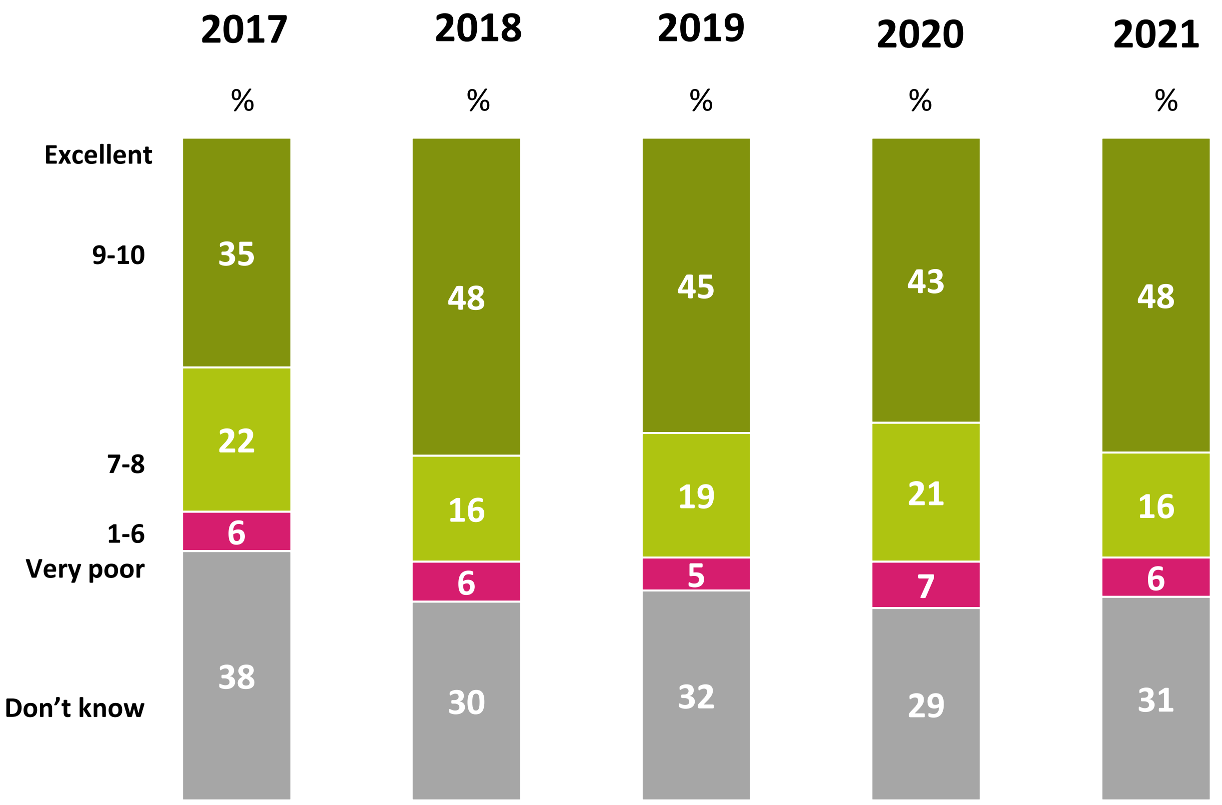


Preference for telephone and email customer support has gone down slightly this year, although it's important to note that large proportions still indicate a preference for these channels. Video chat and screen share support has also dipped slightly this year. Interestingly, online chat has increased significantly from 17% last year to 29% this year.

Q.6 Which one of the following channels would you most prefer for Registry customer support?

Rating on Cybersecurity

All Users



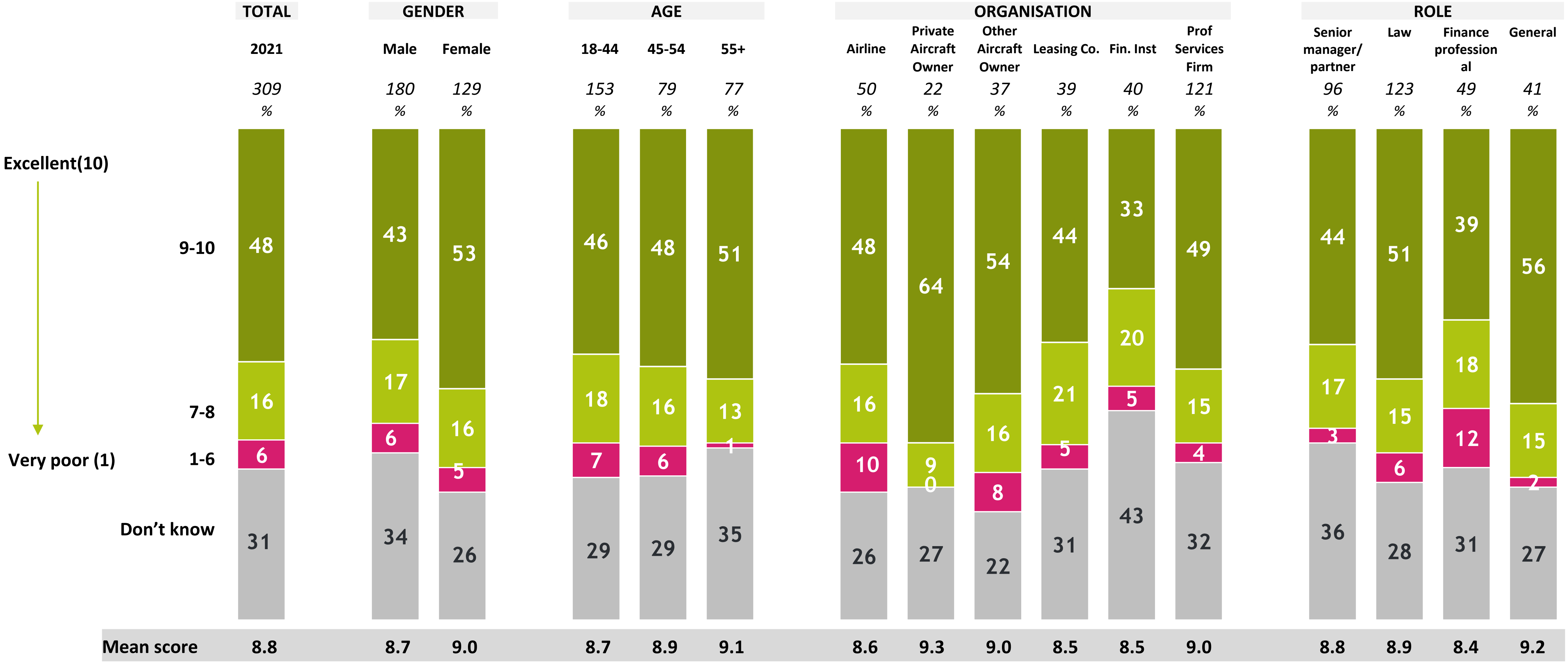
Mean Score	*8.52*	*8.84*	*8.77*	*8.59*	*8.8*

The Registry is rated very positively with regard to information security – scoring 8.8 out of a maximum possible 10 – this is the second highest level to date after 2018.

Q.7a 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 Users N - 309



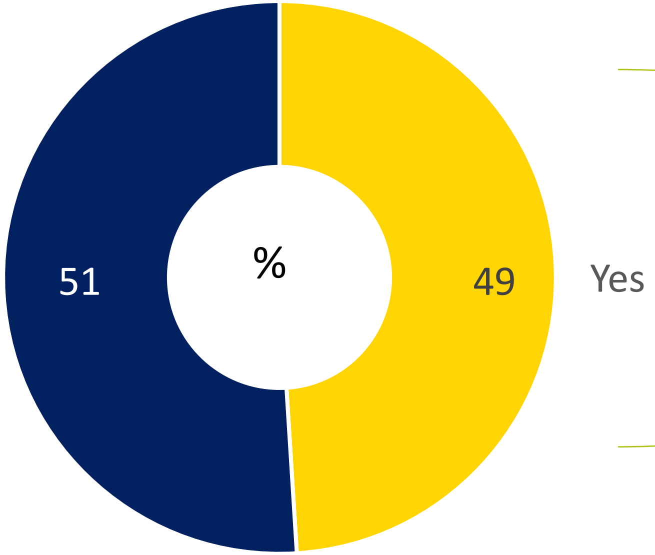
Satisfaction with Registry cybersecurity is high across all user types.

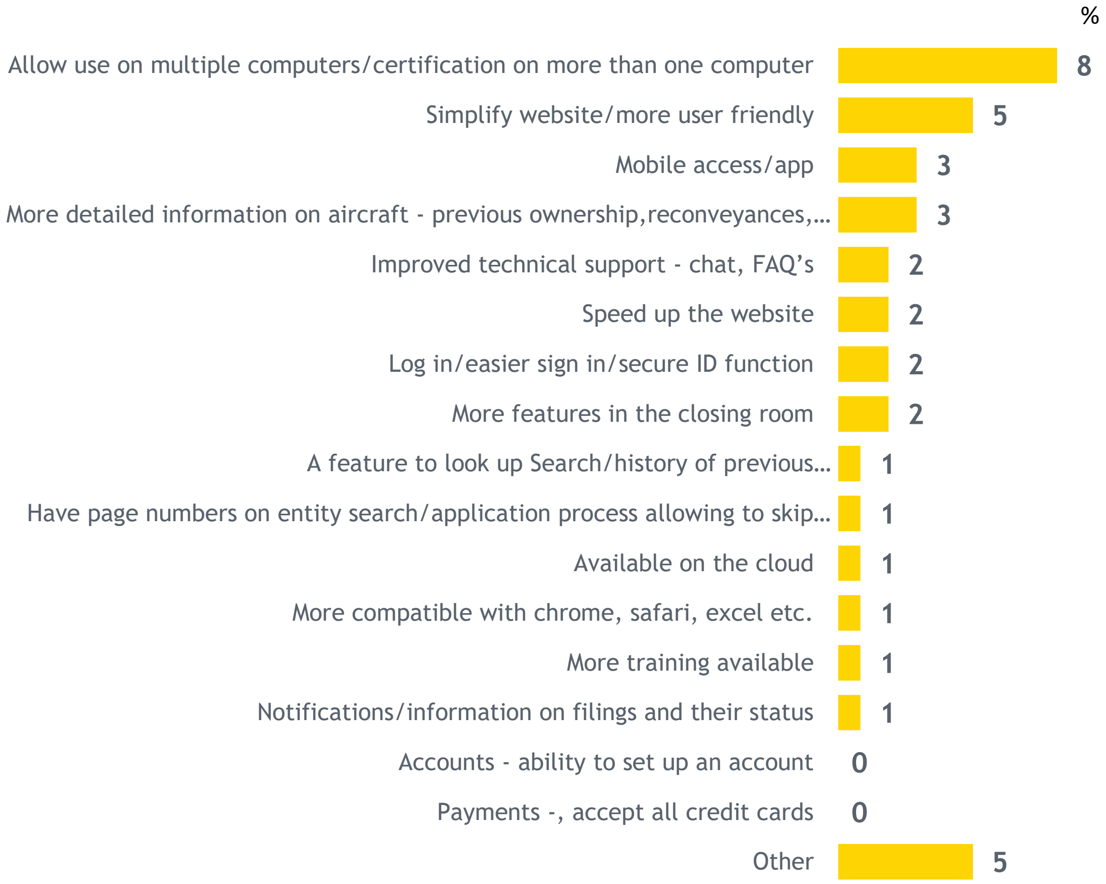
Now we would like to focus on Cybersecurity and how you would rate the Registry in terms of information security. On a scale of 1-10 how would you rate the Registry website on information security where 10 is excellent and 1 is very poor.

Interest in Registry Features

Digital Features, tools or enhancement would like to see from the Registry

Base: All Users N - 309

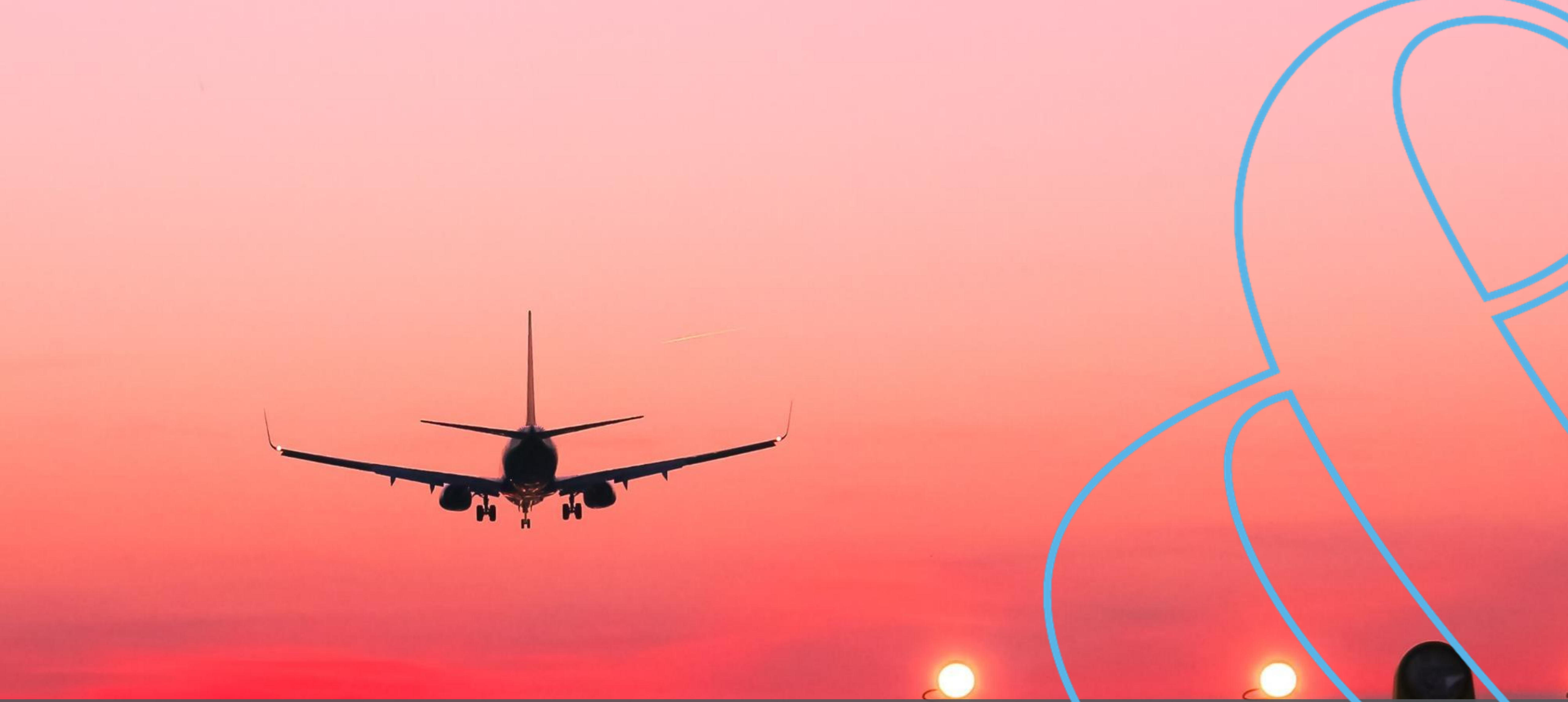




**Caution low base size*

Out of those that answered that they would like to see the Registry offer other digital features, tools or enhancements, the most popular answer is to allow use/certification on multiple computers, followed by simplify/make the website more user friendly.

Q.7b Are there any other digital features / tools or enhancements you would like the registry to offer?

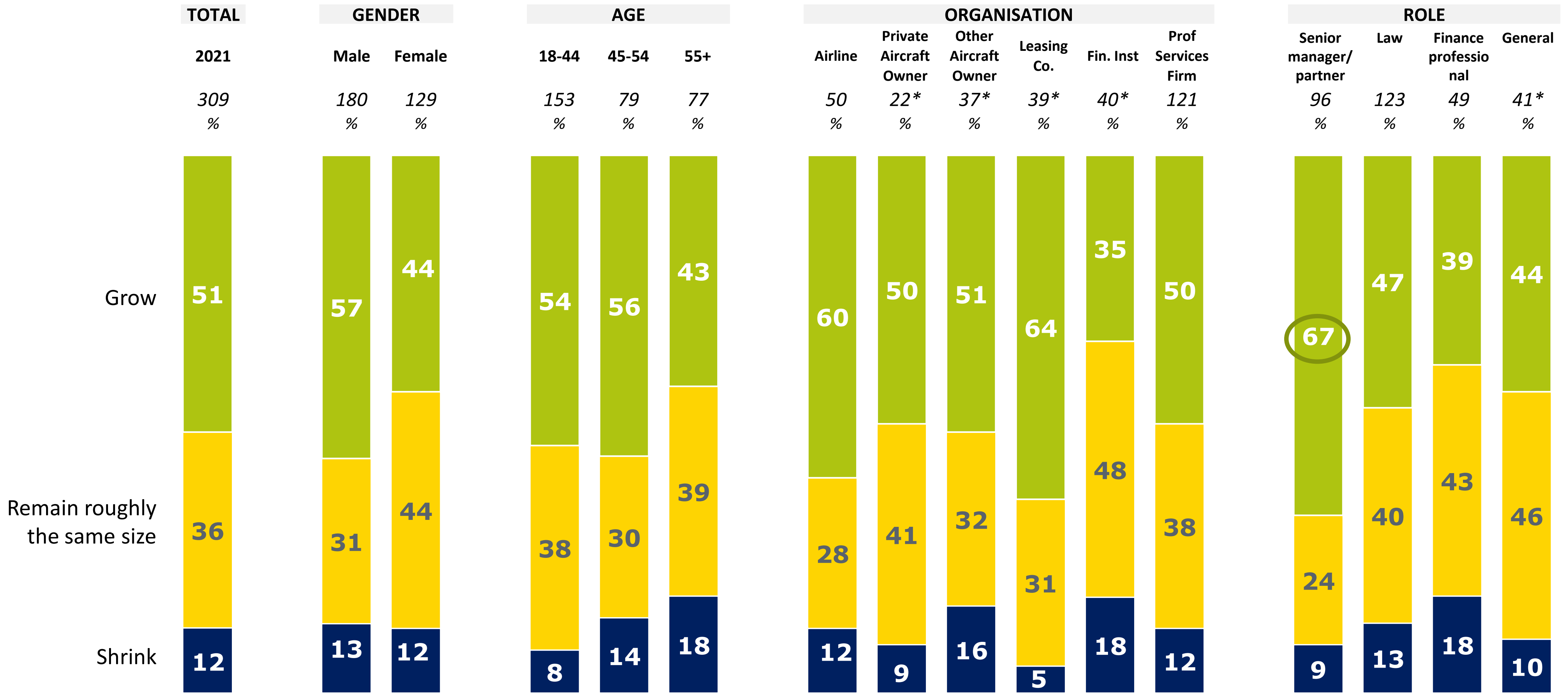


Confidence levels in the Airline Aviation Industry over next 5 years

Confidence levels in the Commercial Airline Aviation Industry over next 5 years vs 2019

Base: All Users N - 309

Significantly higher than total



Half of respondents believe the commercial airline aviation industry based in their country will grow over the next 5 years compared to 2019, while just over a third believe it will remain the same size. Only 1 in 10 believe it will shrink. Interestingly, senior managers/partners are significantly more likely to believe it ill grow.

**Caution low base size*

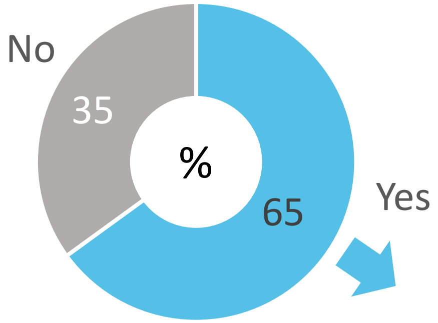
Q8a Do you believe the commercial airline aviation industry based in your country will grow, remain roughly the same size or shrink in the next 5 years compared to 2019?

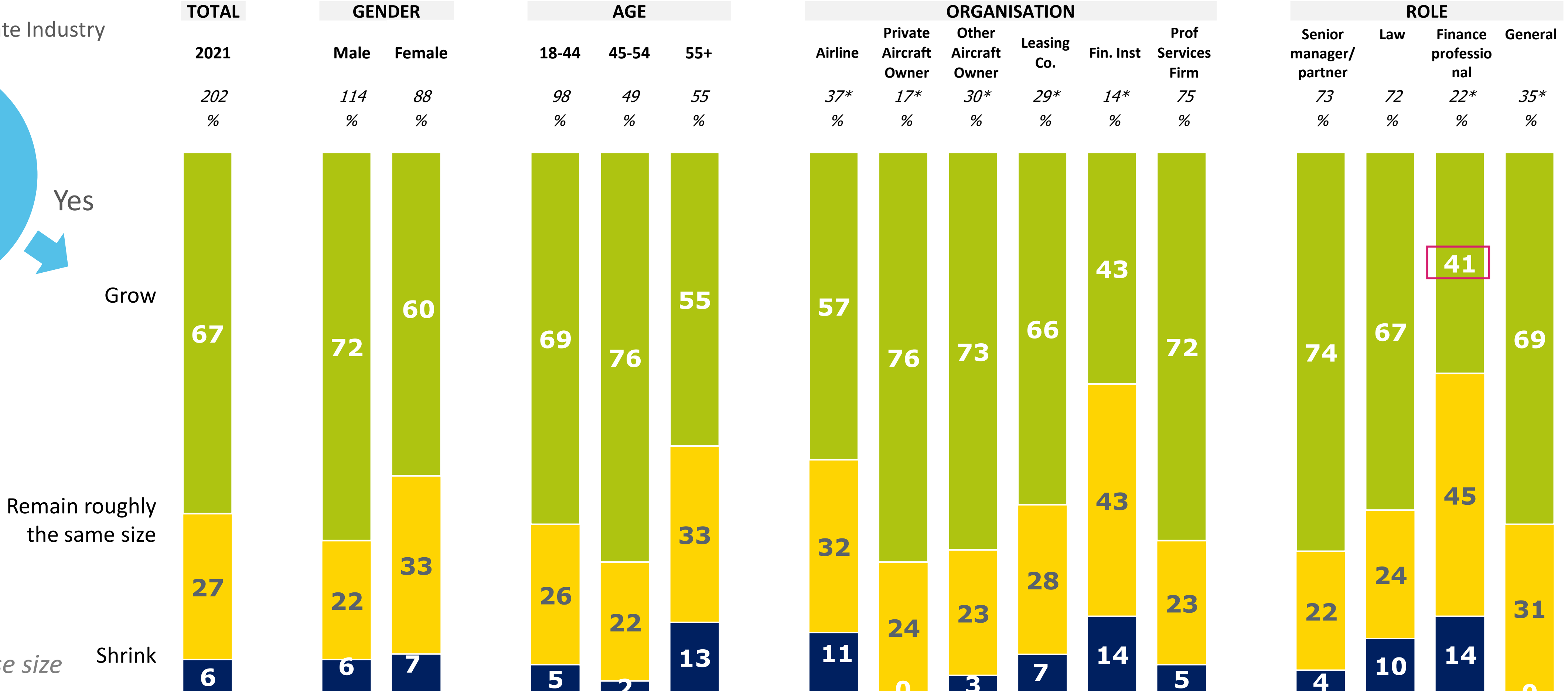
Confidence levels in the Private & Corporate Aviation Industry over next 5 years vs 2019

Base: All Users who work in private/corporate aviation industry – (65%) N - 202

Significantly higher than total
Significantly lower than total

Work in Private/Corporate Industry





*Caution low base size

Out of those who work in the private or corporate aviation industry (65% of the total base), two thirds believe that the private and corporate aviation industry based in their country will grow in the next 5 years compared to 2019. 3 in 10 believe it will remain roughly the same size while only 6% think it will shrink. Finance professionals are significantly less likely to believe it will grow.

Q.8b.Do you work in the private or corporate aviation industry?
Q.8c Do you believe the private and corporate aviation industry based in your country will grow, remain roughly the same size or shrink in the next 5 years compared to 2019?

Likely impact of factors on the future success of the commercial, private and corporate aviation industry

Base: All Users N - 309

Mean	2.55	3.40	4.29	4.04	4.34	4.75	4.83
Net Score (top 3)	75	57	40	43	36	27	20

Bounce back from the pandemic and an increased enthusiasm for travel stands out the most for their anticipated impact on the future success of the commercial, private and corporate aviation industry. This is followed by global economic growth/increased prosperity in the developing world and the pandemic leading to a fear of travel by air (exposure during flight).

Q.8d. Please rank the factors below as to their likely impact on the future success of commercial, private and corporate aviation industry.

Likely impact of factors on the future success of the commercial, private and corporate aviation industry

Base: All Users N - 309

Mean score by demographics	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
Bounce back from the COVID-19 pandemic and an increased enthusiasm for travel	2.55	2.58	**2.50**	**2.46**	2.57	2.70	**1.94**	3.45	2.35	2.49	2.65	2.69
Global economic growth and increased prosperity in the developing world	3.40	**3.32**	3.53	3.47	3.66	**3.01**	3.70	3.41	**2.97**	3.10	3.68	3.42
COVID-19 pandemic leading to reduced enthusiasm for travel for vacations and business	4.04	4.10	**3.95**	4.13	**3.86**	4.04	4.21	4.55	3.73	4.26	**3.50**	4.08
COVID-19 pandemic leading to a fear of travel by air (fear of exposure during the flight)	4.29	4.33	**4.23**	4.37	**4.20**	4.22	4.32	4.09	4.08	4.34	**4.03**	4.45
New technologies leading to reduced environmental concerns	4.34	**4.22**	4.50	**4.22**	4.35	4.55	4.16	**3.95**	4.86	4.21	4.63	4.26
Environmental concerns of travellers	4.75	4.87	**4.60**	**4.63**	4.67	5.08	4.86	4.95	4.92	5.15	4.60	**4.55**
Environmental concerns of businesses	4.83	**4.81**	4.88	**4.82**	**4.81**	4.88	5.02	**3.95**	5.08	5.05	5.00	4.72

Females, 18-44 and airline owners are more likely to rank Bounce back from the pandemic and an increased enthusiasm for travel highest as strong influences.

(The lower the mean score = higher importance)

Q.8d. Please rank the factors below as to their likely impact on the future success of commercial, private and corporate aviation industry.

Summary

Summary of Key Findings

Sample Profile

- Four in ten (39%) of the user sample base is from Professional Services firms, with 35% aircraft owners of some type.
- The profile of users is broadly in line with 2020's sample. Professional Services Firms make up the bulk of the sample again this year.
- The sample is slightly skewed towards males again this year. In terms of age, the 18-34 cohort (22%) has decreased slightly this year compared to last year (25%), while the 45-55 cohort has increased slightly (26% vs 23% last year).
- When it comes to user's role within their organisation, 3 in 10 users (31%) are senior managers/partners which is similar to last year (29%). Lawyers and finance professionals have both gone up slightly this year, while general admin staff and legal assistants have gone down slightly.
- There has been no real change in levels of social media usage compared to last year. Social media usage is higher among females for all of the social media platforms with the exception of LinkedIn and higher among the younger age group (18-44 years) with the exception of Twitter.
- Senior managers/partners register significantly higher levels of LinkedIn usage, while finance professionals register significantly low levels of Twitter usage.
- Users typically use the registry once a month (37%), followed by once a year (30%) and then once a week (20%).
- There has been an increase in more than once a week (20%) when compared to last year (15%) and a decrease in once a month (37%) compared to last year (43%).
- There is an increase in users based in the USA this year after a downward trend the last few years. It is currently back to 2019 levels (35%). Users based in the USA now stands at 35%. (30% in 2020, 36% in 2019, 39% in 2018, 41% in 2017, 44% in 2016 and 49% in 2015). Oklahoma continues to have the highest level of users. The proportion of users based in Texas is closer to 2019 levels this year after an increase last year, while there has been an increase in users based in Illinois and Ohio this year.
- 6 in 10 respondents (63%) completed the survey for the first time in 2021. These "first-timers" are more likely to be male, under 55 years, from private organisations and based in countries outside the US.

Summary of Key Findings

Key Service Aspects

- The fit of Registry with business functionality continues to be the most important definer of the perceived worth of the Registry, with ease of use remaining the second most important driver again this year. Speed of refunds has dropped back from third place in 2020 to 11th place this year. Reliability of technical aspects of the Registry, level of fee charged and speed of the registry during use are also very important.
- Although the overall weighted Registry experience rating has dipped slightly compared to last year, it is still at a remarkably high level of 8.63 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 is 7.60 out of 10 which is down slightly this year but still strong.
- The overall satisfaction rating is highest amongst female users, those aged 55 years plus, private and other owners.
- The perceived worth of the Registry to users' business is at it's second highest level to date at 8.47 out of 10 after a record high of 8.55 last year.
- Satisfaction with registry's official's language skills and speed of refunds have significantly improved this year and are back to 2019 levels, while the fit of the Registry with business functionality and overall ease of use of the Registry have significantly decreased this year after a record high last year.
- Levels of satisfaction with all performance aspects have dipped slightly this year with the exception of reliability of technical aspects of the Registry, speed of refunds and availability of Registry officials. However, it is important to note that despite this dip, satisfaction levels still remain very high.
- Overall satisfaction with four of the top six criteria remains at 8 or higher on a ten point scale. Two out of the remaining seven service aspects exceed a score of 9 out of 10, with the balance not far off achieving 9 out of 10 as well.
- In general, satisfaction is higher among females, those aged 55+, private owners and professional firms.
- As was the case last year, there are very few aspects of service which require critical or remedial attention .
- In superimposing the 2020 data on the original 2007 strategic performance map, we can see the extraordinary extent of the user improvements made over the intervening years

Summary of Key Findings

Overall Satisfaction with the Registry

- Overall satisfaction with the Registry has dipped slightly this year to 7.60 out of 10 compared with 8.10 last year. Satisfaction is highest among other aircraft owners, private aircraft owners and those aged 55+.
- The Registry Net Promoter Score (NPS) are improved to a high of +51. The NPS scores is highest among females and those aged 45+.
- The Registry NPS mean score remains the same as last year at a high of 8.5. When we look at NPS by organisation, it's higher among professional firms, private and other aircraft owners.
- The minority of users who fall into the Detractor segment continue to find the Registry cumbersome/difficult to navigate or feel the fees are too high. Those that are particularly happy with the Registry identify the search facility, the service with the Registry in general and availability of staff/24/7 service as the aspects that work particular well.
- The vast majority (83%) of Registry users report that there has been no impact on their satisfaction with and/or likelihood to recommend the Registry due to the Registry's performance during the pandemic, while 16% report that their satisfaction/likelihood to recommend has been positively impacted. Only 2% report that their satisfaction/likelihood to recommend has been negatively impacted. For those who say their satisfaction has been positively impacted they praise the great level of service provided.
- Most prefer email support as the channel used for Registry customer support, followed by online chat support, telephone support and lastly video chat/screen share support.
- Preference for telephone and email customer support has gone down slightly this year, although it's important to note that large proportions still indicate a preference for these channels. Video chat and screen share support has also dipped slightly this year. Interestingly, preference for online chat has increased significantly from 17% last year to 29% this year.
- The Registry is rated very positively with regard to information security – scoring 8.8 out of a maximum possible 10 – this is the second highest level to date after 2018.
- Satisfaction with Registry cybersecurity is high across all user types.
- Out of those that answered that they would like to see the Registry offer other digital features, tools or enhancements, the most popular answer is to allow use/certification on multiple computers, followed by simplify/make the website more user friendly.

Summary of Key Findings

Confidence levels in the Airline Aviation Industry over next 5 years

- Half of respondents believe the commercial airline aviation industry based in their country will grow over the next 5 years compared to 2019, while just over a third believe it will remain the same size. Only 1 in 10 believe it will shrink. Interestingly, senior managers/partners are significantly more likely to believe it will grow.

- Out of those who work in the private or corporate aviation industry (65% of the total base), two thirds believe that the private and corporate aviation industry based in their country will grow in the next 5 years compared to 2019. 3 in 10 believe it will remain roughly the same size while only 6% think it will shrink. Finance professionals are significantly less likely to believe it will grow.

- Bounce back from the pandemic and an increased enthusiasm for travel stands out the most for its anticipated impact on the future success of the commercial, private and corporate aviation industry. This is followed by global economic growth/increased prosperity in the developing world and the pandemic leading to a fear of travel by air (exposure during flight).

- Bounce back from the pandemic and an increased enthusiasm for travel is highest among females, those aged 18-44 and airline owners.

Thank you.

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Delve Deeper