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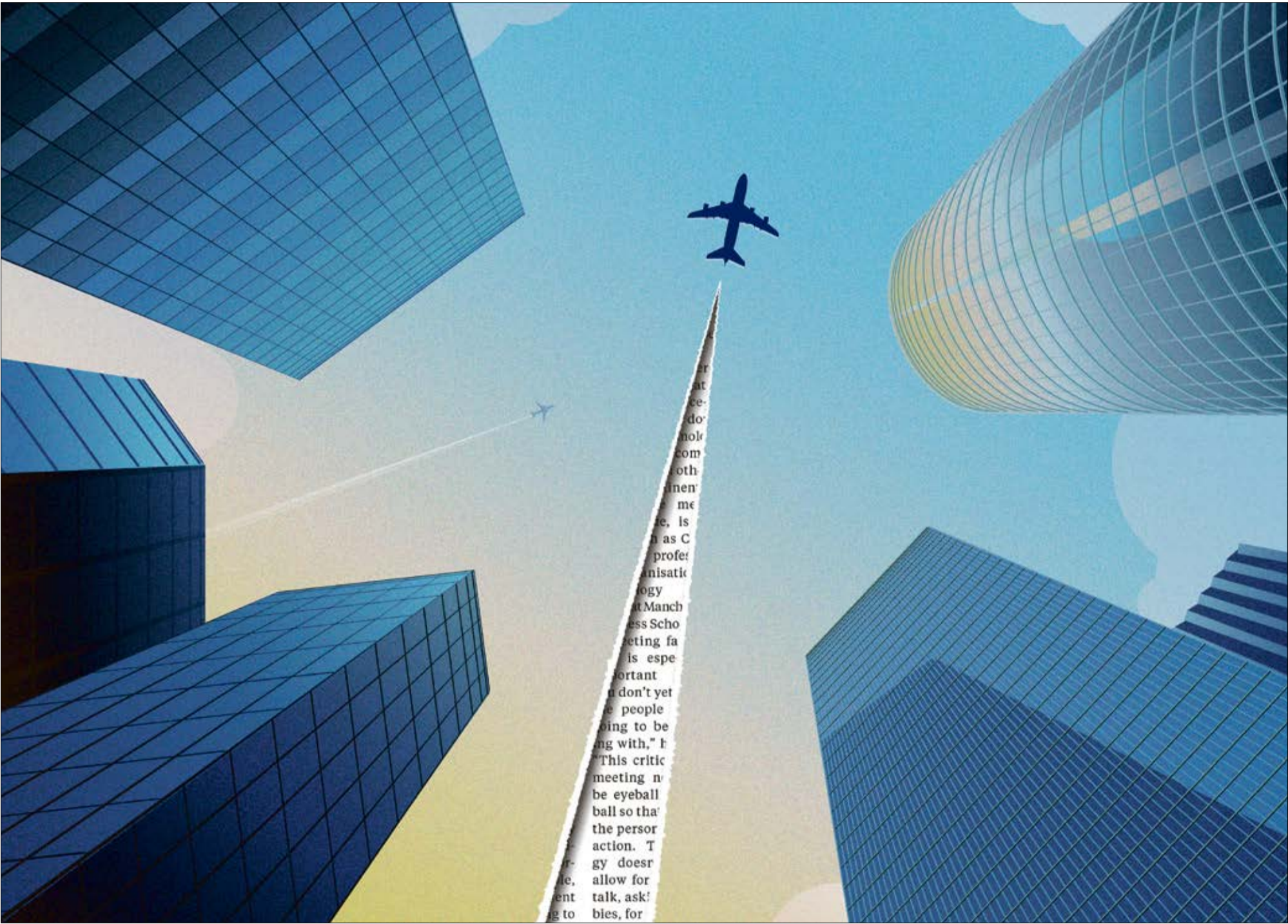
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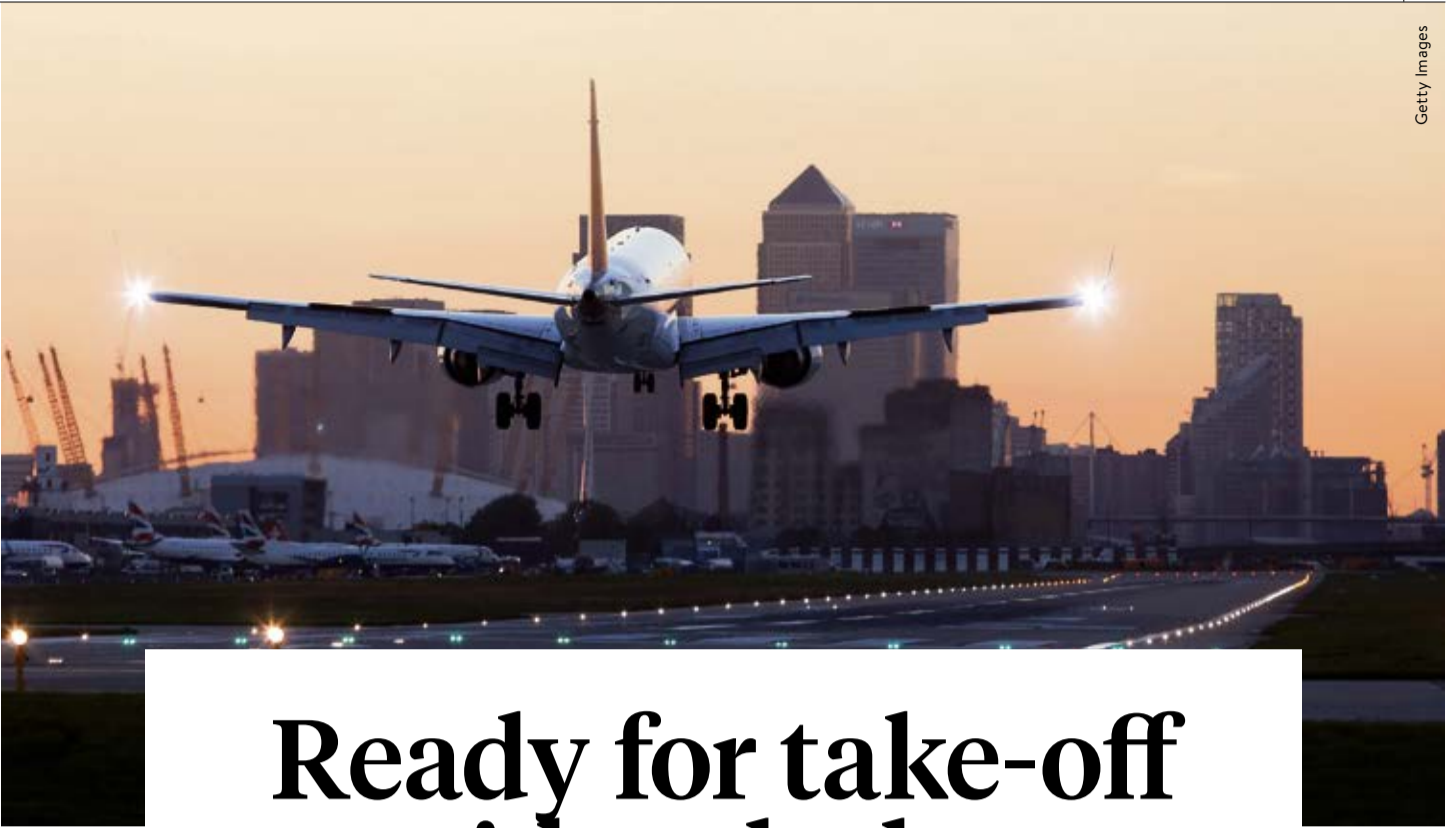
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Getty Images

Ready for take-off amid turbulence

Business air travel is at a key moment in its trajectory – and passengers can benefit from the changes underway

London City Airport handled a record 4.3 million passengers in 2015, up 18 per cent on 2014

OVERVIEW
SIMON BROOKE

What is a crossroads in the world of aviation – an air near miss? Hopefully not, but how ever it's described, business air travel is at a critical juncture.

Falling fuel prices have given it a boost, with the strength of the UK and US economies providing additional stimulus. Recent findings from the *Business Travel* magazine reveal that a third of business travel buyers have more to spend. London City Airport, where business travellers account for more than half of all traffic, saw numbers increase by nearly a fifth to 4.3million between 2014 and 2015.

On the other hand, the slowdown in China, the eurozone's continued stagnation and fears about a rise in US interest rates are still causes for concern, and have prompted many companies to keep a closer eye on their business travel budgets and look for better deals. Research by Collinson Group, which owns business lounge access service Priority Pass, has found, for example, that three-quarters of frequent business travellers are choosing to fly economy.

However, the case for business travel, including air travel, remains strong. According to a report by the US Travel Association, for every dollar invested in business travel, businesses benefit from an average of \$9.50 in increased revenue and \$2.90 in new profits. The most recent Travel Leaders Group research found that millennials are nearly twice as likely to want to travel more for business than

baby-boomers (45 per cent compared with 26 per cent).

Over half (57 per cent) of millennials believe that technology can never replace face-to-face meetings to get business done. The idea that, although technology has made the options for communication with colleagues in other cities, countries or even continents easier than ever, face-to-face meetings still have great value, is supported by experts such as Cary Cooper, professor of organisational psychology and health at Manchester Business School.

"Meeting face to face is especially important when you don't yet know the people you're going to be working with," he says. "This critical first meeting needs to be eyeball to eyeball so that you get the personal interaction. Technology doesn't easily allow for that all important small talk, asking about family and hobbies, for instance."

It's also easier to overcome cultural differences when you sit down in someone's office and see where they live and work. "This is particularly important when you're dealing with different cultures, such as Japan and other far-eastern countries. Once you've established that initial contact and developed the personal chemistry, then it's a lot easier to use Skype and e-mail," says Professor Cooper.



33%

of business travel buyers plan to spend more in the next three years, up from 18 per cent last year

Source: *Business Travel* 2016

Business travellers can now access private aviation quickly and more cheaply than ever before and, at the other end of the price scale, they're being courted by budget airlines with special prices, packages and services.

Another factor that business travellers and senior managers are increasingly taking into account is the amount of work that executives can do while they travel. According to the US Travel Association survey, business travellers will intentionally arrive early at the airport so they can enjoy business lounge facilities, with 42 per cent reporting they see it as an opportunity to get some work done and 81 per cent keen to take advantage of free wi-fi.

Providers are raising their game. As well as improved connectivity, London City Airport is now offering a free shoe shine and a paid-for service called AirPortr, which allows passengers to leave their luggage at the airport, go to their meetings and have it waiting for them in their hotel at the end of the day. On departure, they can have their luggage collected from their hotel or office, visit clients and others, and pick it up at the airport before their flight.

Airlines too are realising that adding value generally is increas-

ingly important. "While price is always one factor, we're seeing that business travellers are increasingly searching for the best-quality seat and wider customer experience," says Jon Harding, senior vice president, north, south and west Europe, at Qatar Airways. "I think seat quality will continue to be a major differentiator." Qatar's new business class seat, flying from December, is intended to feel like a first class seat.

"Business travellers have revealed a strong desire for experiences to enhance their travel experience, such as access to airport lounges, concierge services and upgrades," says Errol McGlothlan, general manager at Priority Pass. "They are also keen to extend the benefits from their business trips to improve the experience of travel with their families, for example using points to ensure they can book plane seats together for their families when on holiday."

The industry does, though, continue to face long-standing criticisms. Delayed flights are still a bugbear for 87 per cent of business travellers, according to the most recent Travel Leaders Group survey, as are fees for changing flights (73 per cent) and seat (62 per cent).

Greater competition and evermore demanding passengers mean business air travel is facing increased challenges. But this is one industry with innovation and agility at its core – and that means business air travellers have more options than ever before.

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High-tech airport is no flight of fancy

The airport of the future will be a low-stress, high-tech terminal – a well-connected place to work, shop and relax as well as catch a plane

FUTURE AIRPORT
ELEANOR ROSS

Damien Fo packs his laptop into his bag each day and boards the 30-minute airport express train from downtown Singapore to Changi Airport.

Voted the world's best airport almost every year by almost every organisation, Changi is successful because it has successfully bridged the gap between catering for locals, business travellers and tourists.

Mr Fo frequently uses the airport as somewhere to work, making use of the comfortable seating areas and fast wi-fi. The future airport hopes it can do the same.

Passengers are demanding more from their airports than ever before. According to the International Air Travel Association, 3.6 billion people are expected to take to the skies in 2016, expanding by an average of 5.3 per cent as China's aviation market grows rapidly.

So how will airports evolve to deal with the need for more efficient operations to deal with more passengers, higher cost of land and a demand for better retail experiences?

As more people fly, a smooth airport experience for passengers is vital and a key concern for the airport of the future. Airport operators are starting to employ external companies to harvest and manipulate data to work out how they can link different services together and provide a more relaxed travel experience.

Richard Wilks, aviation business development manager, Europe, Middle East and Africa, at NEC Display Solutions, explains how it is often the journey to the terminal which causes the most stress. Airports must understand how they can link better with road and rail systems to cut down on passenger stress.

His vision? The gate of the future. At the departure gate, a large screen or digital wall will enable passengers to visualise data provided by multiple stakeholders.

“Whether used to automate end-to-end baggage handling systems or complete menial tasks, robots will be a feature of the future

“There are many systems operating at an airport – catering, baggage handling, security – the key is to standardise this data in order for it to be visualised in one place. Updates such as ‘inbound flight is delayed but arriving in five minutes’ or ‘there are delays through passport control at your destination’ will keep passengers fully informed for a more positive experience,” says Mr Wilks.

Self-service will dominate the airport terminal too. Anyone who trav-

els regularly will have noticed how passengers are now discouraged from using check-in desks unless they need to check in luggage.

At London's Gatwick Airport, a spokesperson explains how the airport is innovating to bring more passengers in through their doors: “We will be opening the world's largest self-service bag drop soon. Convenience is key for our passengers as 60 per cent check in online; the number checking in by mobile is eight times greater than two years ago.”

One of the main reasons for this, says Mr Wilks, is that space in an airport is at a premium. “The less space used for check-in desks, the more is freed up for retail,” he says.

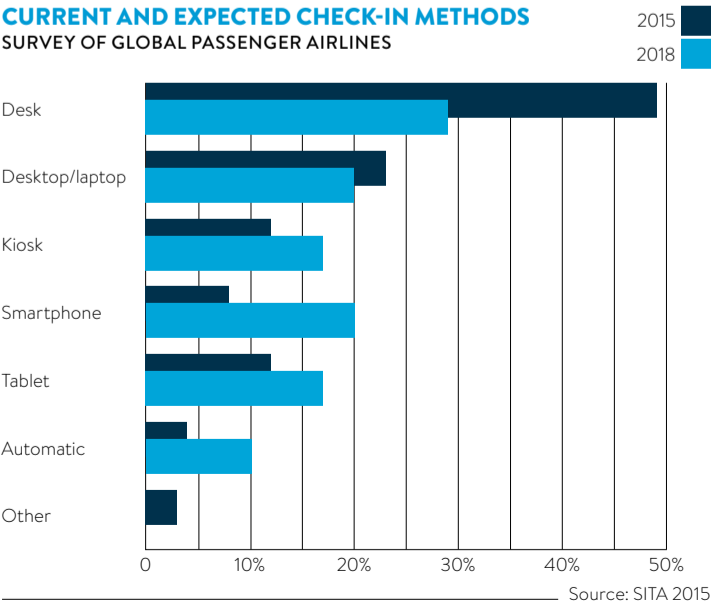
In addition, the airport of the future should see a rise in digitised and personalised services, enabling passengers to change catering options or upgrading their seats before self-boarding.

Alongside retail and passenger efficiency comes the rise of technological innovation at airports. Everything from luggage to security can be automated with the right data. Rohit Gupta, a vice president at global IT company Cognizant, explains how biometric technology will play a large role in the future airport.

“Biometric technology will be one of the most pertinent innovations,” he says. “Currently there are various biometric solutions available, such as fingerprint, retina scanners, voiceprint and facial recognition systems. The same sensors can also provide health data about travellers by scanning their temperature, making it easy to quarantine passengers coming from infected territories.”

The reason why we screen at airports may change as much as the way we screen. Airports could potentially see a move towards risk-

CURRENT AND EXPECTED CHECK-IN METHODS
SURVEY OF GLOBAL PASSENGER AIRLINES



01 Illustration of the Jewel development at Changi Airport to expand leisure and retail facilities at one of Asia's largest transportation hubs

02 Heston Blumenthal's restaurant, The Perfectionists' Café, at Heathrow Terminal 2

03 Self-service passport control with biometric technology at Amsterdam's Schiphol Airport



based screening that assesses the intent to do harm. Susan Baer, global aviation business leader at Arup, says: “We'll require less equipment and infrastructure around the screening point. Monitoring the behaviour of passengers through CCTV cameras and other forms of sophisticated software will be critical to this, with searches or screenings of passengers if they act in an abnormal or hostile way.”

Amsterdam's Schiphol Airport has recently kickstarted its Happy Flow project, where biometrics are used as the key identifier at all airport checkpoints, while Incheon Airport in Seoul is racing towards the top of its class when it comes to airport tech. Incheon has introduced a concept called U-Airport, a facial recognition system that compares the photo stored in the radio-frequency identification chip on an e-passport against the photo captured by the airport machine.

Airports may also find ways to integrate robotics into an airport. Whether used to automate end-to-end baggage handling systems or complete menial tasks, robots will be a feature of the future.

Robotic devices are currently being trialled at Schiphol. As well as having one of the most advanced security checkpoints in the world, trials of the Spencer robot have been underway since November 2015. KLM pumped a lot of money into robotics research because it

acknowledged people were getting lost at Schiphol. Now a robot roams Schiphol terminal with laser range-finding eyes and a map of the airport interior. It's hoped this trial will lead to better understanding of how robotics can be used as part of future airport developments.

Airports will continue to double up as high-end research outlets. The quality of terminals is improving globally and will continue to do so. In India, for example, it wasn't uncommon to see a chai wallah handing out tea at an airport terminal ten years ago. Latest research shows passengers now demand quality and varied shops, a diversity of restaurants, and bars in an attractive environment.

Developers are looking at how to draw locals into the airport too, like at Changi. At Munich Airport, there's even a supermarket that gets around Sunday trading hours. At London's Heathrow, there's a growing trend of people who want to use the airport as more than somewhere to get on a plane. “We see lots of demand for hotels, places where people can relax or unwind, hold business meetings, and of course there's a huge amount of activity linked to cargo and logistics built up around Heathrow,” according to a spokesperson.



COMMERCIAL FEATURE

NOW YOU CAN SEARCH, COMPARE AND BOOK YOUR PRIVATE FLIGHT IN LESS THAN TWO MINUTES

As the world of private aviation evolves, one industry pioneer is grabbing the attention of businesspeople and private jet operators alike with its revolutionary real-time booking system that provides accurate pricing in seconds



Once regarded as the preserve of chief executives and movie stars, private jets are now available to a far wider clientele. Meanwhile, operators are seeing these expensive assets put to greater use as planes spend more time flying passengers and less time sitting on the ground or flying empty.

The private aviation sector has undergone enormous changes over the last few years with new providers and new business models challenging the traditional way of booking flights.

New industry players might have introduced online platforms, but with many of these, customers are still required to wait, sometimes for hours, while quotes are obtained manually from a number of operators to finalise their booking. Even then they can't be sure until well into the booking process of exactly how much they'll be expected to pay.



The world's most sophisticated price comparison site

But now a pioneering player appears to have finally solved these residual problems, bringing the private aviation industry into the 21st century, and in doing so it has grabbed the attention of savvy travellers who want to book quickly and easily, and get the very best deal when they fly by private jet.

Stratajet optimises private jet door to door. Imagine that you need to be in Zurich at 2.30pm for a meeting. In a matter of seconds, the system will find the most convenient flight at the best price and then tell you exactly what time you need to leave your home or office.

Described as "the world's most sophisticated price comparison site", it takes advantage of what are called partial empty legs. Say, for example, you want to fly from Barcelona to Paris. The sophisticated Stratajet technology can identify a plane flying empty from, perhaps, Madrid to London. It will arrange for this plane to take a detour so it can fly you from Barcelona to the French capital, creating efficiencies that save the traveller money and improve the operator's profitability.

Stratajet was founded by Jonny Nicol, an ex-military officer and pilot, who later flew private jets. "I realised that the system was working in the same way that travel agents used to when you'd book a holiday before the introduction of the internet," says Mr Nicol, offering another analogy.

"If aviation was like road travel, then today we'd only have buses and limos. What Stratajet does is to convert some of those limos into taxis. So, just as a group can often travel more cheaply and conveniently by taxi than by bus, we're allowing them to do the same by taking a private jet rather than buying a number of business class seats."

The sophisticated technology behind Stratajet means that it's the world's first real-time online booking platform for customers, with the ability to provide an accurate price



and book a jet within two minutes – a process that used to take hours.

Meanwhile for operators, it provides free sales and customer relationship management software that integrates seamlessly and automatically into their booking systems to help them sell more flights and reduce inefficiencies.

Delivered via an app or its website, the Stratajet offering is completely different from anything else available in what is already a fast-moving and innovative sector. Stratajet allows operators to increase their revenue with its online sales platform, while the removal of the manual element drives down costs.

The company's complex algorithms and search engine technology, which have taken over five years to develop due to the huge number of variables involved, allow customers to simply enter their postcode. The service does all the rest, recommending the best airport for their location.

Stratajet's databases contain detailed geographical information, including aircraft locations, repositioning costs, drive times, landing fees, airfield charges and opening hours, so it can identify the most cost-effective airfields for a client's trip and present them with the most convenient options.

The company's software factors in a staggering number of calculations in order to provide a quote. "For example, it has to consider 15 different elements when producing a price for a customer and just one of



these – the landing fee – involves 247 different variables," says Mr Nicol.

But the mind-boggling amounts of data that are crunched from airports around the world by its complex algorithms are then translated into a very simple and intuitive interface for the client through Stratajet.com or the Stratajet app.

All prices shown are 100 per cent accurate all of the time, so there is no need for customers to seek quotes. And Stratajet is so confident



If a customer finds a better price for the same aircraft from another provider, Stratajet will match it

in the reliability of its software that if a customer finds a better price for the same aircraft from another provider, the company will match it.

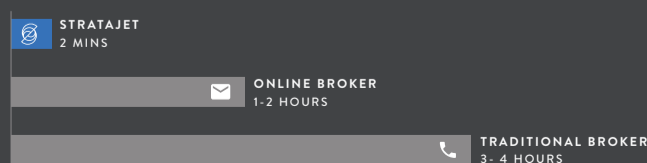
Stratajet also believes the human touch is essential alongside sophisticated algorithms and its user-friendly app, and so its customer service team is on hand 24 hours a day, seven days a week to ensure the trip is safe, easy and smooth running.

"This is a watershed moment in the history of private aviation," says Mr Nicol. "From now on people will divide it into 'pre-Stratajet' and 'post-Stratajet'. For business travellers and jet operators alike, this is really a game-changer."

www.stratajet.com

BOOKING ON STRATAJET

HOW LONG DOES IT TAKE TO BOOK YOUR PRIVATE JET?



Giving business international lift-off

Flying to an international business meeting by private jet may sound pricey, but there are ways and means, involving a number of different options, which could be worthwhile

PRIVATE JETS

PAUL SILLERS

Breakfasting with angel investors in Zurich, followed by a lunchtime tour around your factory in Turin, then a hop down to Cannes to attend a red carpet gala that evening – it's all comfortably doable when you have your own private jet. Even arranging the logistics can be a doddle if you understand the options and know how to access them.

But to the business jet newbie, there's a perplexing array of choices: outright ownership, charter, fractional ownership, plane-sharing schemes, empty-leg flights – the list seems daunting.

Some of these options are established business models, some are upstarts taking inspiration from the sharing-economy paradigms pioneered by Uber and Airbnb. The thing is, there isn't a best option, only the option that's best for you, depending on a complex equation of factors, such as how soon you need to fly, where you're going, how frequently you need to travel, whether you're flying solo or travelling with an entourage and the level of inflight service you require. Plus there's the not inconsiderable matter of your budget.

On top of that, there are seasonal spikes in demand. For example, when it's the week of the Monaco Grand Prix, private charter flights to the Riviera get snapped up faster than you can say "Lewis Hamilton".

Bringing new clarity and transparency to the sometimes inscrutable world of private aviation are two driving forces – disruption and technology.

Branded a disruptor when it introduced the fractional jet business model to Europe in 1996, Berkshire Hathaway-backed NetJets Europe is now a prevailing and mainstream force in the market, with a business-centric client demographic.

"Seventy per cent of our customers – we prefer to call them owners – are chairmen and CEOs of their own private companies," says Marine Eugène, NetJets Europe head of sales. "These tend to be businesspeople who make extensive use of their share, meeting clients during the week, but then flying down to their chalet in the South of France for the weekend. Fifteen per cent of NetJets' clientele comprise publically listed multinationals whose board mem-

bers fly intensively through the week; the remaining 15 per cent are celebrities."

But then, these days, most celebs are business savvy or at least have business advisers operating in the background. It's all a far cry from the lingering fallacy that private aviation's customer base is dominated by rock stars and royalty.

It may no longer be the new kid on the block, but NetJets is still very much a change-instigating presence in the executive aviation market as it pioneers new technologies.

Inside the cabin, for example, it offers Gogo Text & Talk giving pas-

sengers mobile phone connectivity. NetJets has also developed an app which provides access to on-board wi-fi plus a vast selection of entertainment and news content which is uploaded to on-board servers just before take-off.

"Your iPad automatically connects with the aircraft system," says Ms Eugène. "Suddenly you have hundreds of movies, and the app even controls cabin temperature and lighting. We're implementing it in Europe, but it's already live in the US."

However, will technology supersede the concierge-like personal experience that executive jet users have become accustomed to? "Of course we have an app to book; everybody has an app to book. We see it as a bolt-on, it's not a replacement for human interaction," says Ms. Eugène.

"If you're a NetJets owner, we have a 24/7 multilingual team that speaks your language, they know you personally – on average our customers have been with us eight to ten years.

Our team knows your family, your assistant and we find our clientele demand a personalisation of service. Human contact remains very prevalent and we do not want to replace that with an app, though it's popular with some of our tech-savvy owners."

But what if you're not in the NetJets league? Say you want to peruse a range of private flying options underpinned with the type of online price-comparison technologies and transparency we already use for food shopping, buying pet insurance or booking cinema tickets?

That's part of the mission ex-RAF and ex-NetJets pilot Adam Twidell had in mind when he set up PrivateFly, a global booking service for private jet charter which uses a unique online platform and apps to source "a live global network of over 7,000 accredited aircraft, to pinpoint the best available private aircraft at the most competitive, transparent market price".

Mr Twidell realised at the inception that his company, based in St

Business jets are like time machines, accelerating personal productivity by facilitating multiple face-to-face meetings across geographic borders within the working day

NetJets Europe, a subsidiary of NetJets Inc, says 85 per cent of its customers are businesspeople



NetJets

BUSINESS AVIATION EUROPEAN FACTFILE

There are 2,500 private aircraft available for charter from around 700 charter operators

Private aircraft range from 2 to 250 seats

Pets can travel by private jet with their owners in the cabin, rather than in a cage in the hold

You can land at 10 times more airports on a private jet – 3,000 versus 300 for airlines

The most popular route is Paris to Geneva, which costs £3,700 for a same-day return for a four-seater small jet

15 minutes is the average check-in time before take-off. London City, however, offers a 90-second arrival-to-boarding pledge

Europe's busiest airport for private jets is Paris Le Bourget, with 51,186 flights in 2015

Europe's private jet demand peak is experienced in May, for travel to the Cannes Film Festival and Monaco Grand Prix



52.4%

of the flights taken by private aircraft passengers help them keep business schedules that can't be met efficiently using scheduled airlines

Source: NBAA 2015

Source: PrivateFly.com

Albans, had to be available on all channels to its customers. "We're not just a website, we're not just an app, we employ flight advisers who have loved aviation since the age of five and they've just got such a deep knowledge," he says. "They'll be able to tell customers if a fuel stop will be required or if six sets of golf clubs can fit in a Citation Excel."

PrivateFly's service advantage is to combine the booking technology and transparent choices with a human voice. "Often our customers will book online, but then they might give us a call just before the flight to discuss the finer details of the catering," says Mr Twidell.

Another innovative and technology-driven initiative was PrivateFly's decision to open its service to the scrutiny of the broader public through its inclusion on online customer review site trustpilot.com, where prospective users of PrivateFly can surf through reviews from customers who have used the service.

Mashing up business models, another player in the sector is New York-based Wheels Up, which some commentators have dubbed the Uber of the executive aviation world. Operating a fleet of King Air 350i and Citation Excel and XLS aircraft, the service uses a membership club model, offer-

ing “two ways to buy” and “two ways to fly”.

Individual/family membership costs a one-time \$17,500 initiation fee with annual dues of \$8,500; corporate membership costs \$29,500 initiation plus \$14,500 annually. Members choose from “pay as you fly” fixed hourly rates for occupied hours or there’s a “pre-purchase programme” where, by putting your money down in advance, you can access additional guarantees and benefits. Celebrity customer endorsements come from the likes of tennis icon Serena Williams and golfer Rickie Fowler.

Closer to home, and ruffling more than a few feathers in the process, Ryanair has mooted the notion of introducing a 60-seater Boeing 737-700 corporate jet service. A publicity stunt to counter easyJet’s success among business travellers or is it really a viable and imminent proposition? It would certainly align with

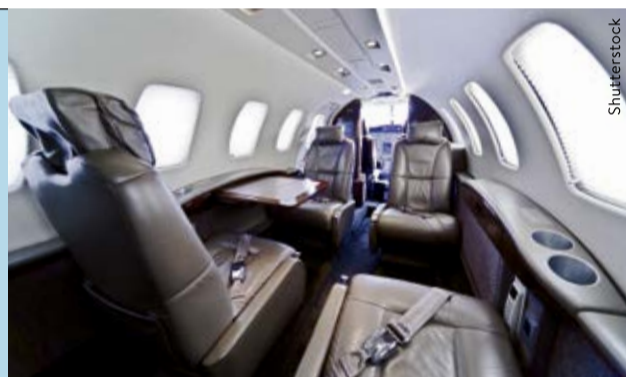
Ryanair’s new-found commitment to up its game in the customer service stakes.

“If they went for it, I think they would do very well in the market,” says PrivateFly’s Mr Twidell, “because there’s a gap in that market for that size of aircraft for football teams, for conferences – and obviously, with their buying power for aircraft and fuel discounts, Ryanair could run it very leanly.”

Business jets are like time machines, accelerating personal productivity by facilitating multiple face-to-face meetings across geographic borders within the working day. With new business models popping up, increased transparency and evermore providers entering this complex but fascinating sector, the prospective customer is spoilt for choice.



CHOOSING THE BEST OPTION FOR YOU



CHARTERED FLIGHTS

These offer the freedom to select the appropriate aircraft for the number of passengers, the range of the flight and the level of service you require. Some small private airports can’t accommodate larger aircraft and some smaller jets might not have the range you need, but charter providers can solve that equation for you. After touchdown, you walk away from it all – no sleepless nights worrying about volatile fuel prices, the latest maintenance requirements, insurance costs or aircraft parking fees at the airport.

FRACTIONAL OWNERSHIP

This is a compelling option if you require private flight on a regular and intensive basis. Typically, owners own a sixteenth of an aircraft within a fleet comprising a range of different aircraft types, so you have access to other planes, not just the plane you partly own. There’s flexibility to even change your destination mid-flight, which would be a costlier option on a chartered flight.

OUTRIGHT OWNERSHIP

This suits uncompromising high-net-worth individuals with the passion to fly in an aircraft that’s configured to their precise specification. Want to redecorate the cabin with crocodile-skin covered

seats or install a gold-plated Jacuzzi? No problem – it’s your jet. You can hire or employ your own personal pilots, flight attendants and on-board chef. Downside is new jets depreciate at 20 per cent in the first year and by 10 per cent annually thereafter. When the plane goes into the hangar for maintenance, you’ll have to charter a jet to get airborne.

EMPTY-LEG FLIGHTS

These are flights that become available when a chartered flight has dropped its passengers off and is heading back to its home base or the airport for its next chartered trip. These flights go ahead regardless of whether passengers are on board, so they’re made available at very competitive rates via specialised online booking engines. Sharp-eyed clientele have been known to travel in style for less than a flight on a low-cost carrier, but you have to be quick off the mark to bag a deal as more and more people are becoming aware of this option.

SHARED FLIGHTS

These are the new upstarts, courtesy of the sharing economy. The idea is that empty seats on chartered flights or flights on planes that are owned outright are made available via social networks. But do you really want to share your executive jet flight with a total stranger?

Just because you’re flying at 30,000ft in a private jet it doesn’t mean you should have to put up with broadband dropouts

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Business routes are opening up

Affordable international airline routes can be the lifeblood of UK regional businesses eager to export and forge

GOING GLOBAL

PAUL SILLERS

“It wasn’t for the low-cost airline route networks, our business would be limited to operating provincially,” says Ted McMullen, managing director of McMullen Facades, part of Lakesmere Group.

His company designs, manufactures and installs cladding for some of the UK’s next generation of high-profile architectural landmarks, including the Canary Wharf Crossrail Development and Manchester’s National Graphene Institute.

“Our relationship with easyJet streamlines our team’s journey through the airport,” says Mr McMullen, referring to fast-track security arrangements and dedicated bag-drop desks the airline offers via its Plus Card.

But bypassing the choke-points and hubbub of a busy terminal is just one reason the airline features prominently in Mr McMullen’s logistics strategy. The main incentives are easyJet’s route network and price point, enabling the building specialist’s project leadership teams from its headquarters in Northern Ireland to commute to construction sites on the UK mainland.

The routes are also indispensable conduits for the skilled workforce that flies in from Poland, and for accessing supply chains in Spain and Germany. It’s a matrix of route connectivity that underpins the business’s viability.

On the flip-side of that business-airline interface, Anthony Drury, director and head of business at easyJet, says that over a fifth of easyJet passengers are travelling for business purposes – that’s more than 12 million people and over 95 per cent of them are repeat customers.

“We’ve actively been targeting business travellers for many years now; this is not new to us. We first went on to the global distribution systems used by business travel agents in 2007 and have successfully grown our share of the managed corporate travel sector,” says Mr Drury, referencing the reach of the carrier’s route network. “We fly to more primary airports on the top 100 European routes than any other carrier and our on-time performance is one of the best in the industry.”

This symbiosis between businesses and the airline networks they rely upon to access customers and extend geographic footprint is prevalent not

just in countless UK businesses, but also across the UK’s numerous clusters of local business communities and associations that help amplify their members’ voices at a more global level.

Located in the heart of southern England with Gatwick Airport at its centre, one such body is Gatwick Diamond, so called due to the shape of its geographic borders. It encompasses more than 500 international businesses, including the UK headquarters of Unilever, Canon, Nestlé, Thales and Novartis, fostering inter-trading opportunities for its members, encouraging inward investment and promoting links throughout the UK, Europe and beyond.

“One of my mantras is that an airport brings economic diversity,” says

Gatwick Diamond’s chief executive Jeremy Taylor. “While Gatwick is known as a leisure airport, 20 per cent of its traffic is business travel. And just because a destination has a good climate, it doesn’t mean there isn’t a good business opportunity there.” Companies within Gatwick Diamond’s ambit may favour the proximity of

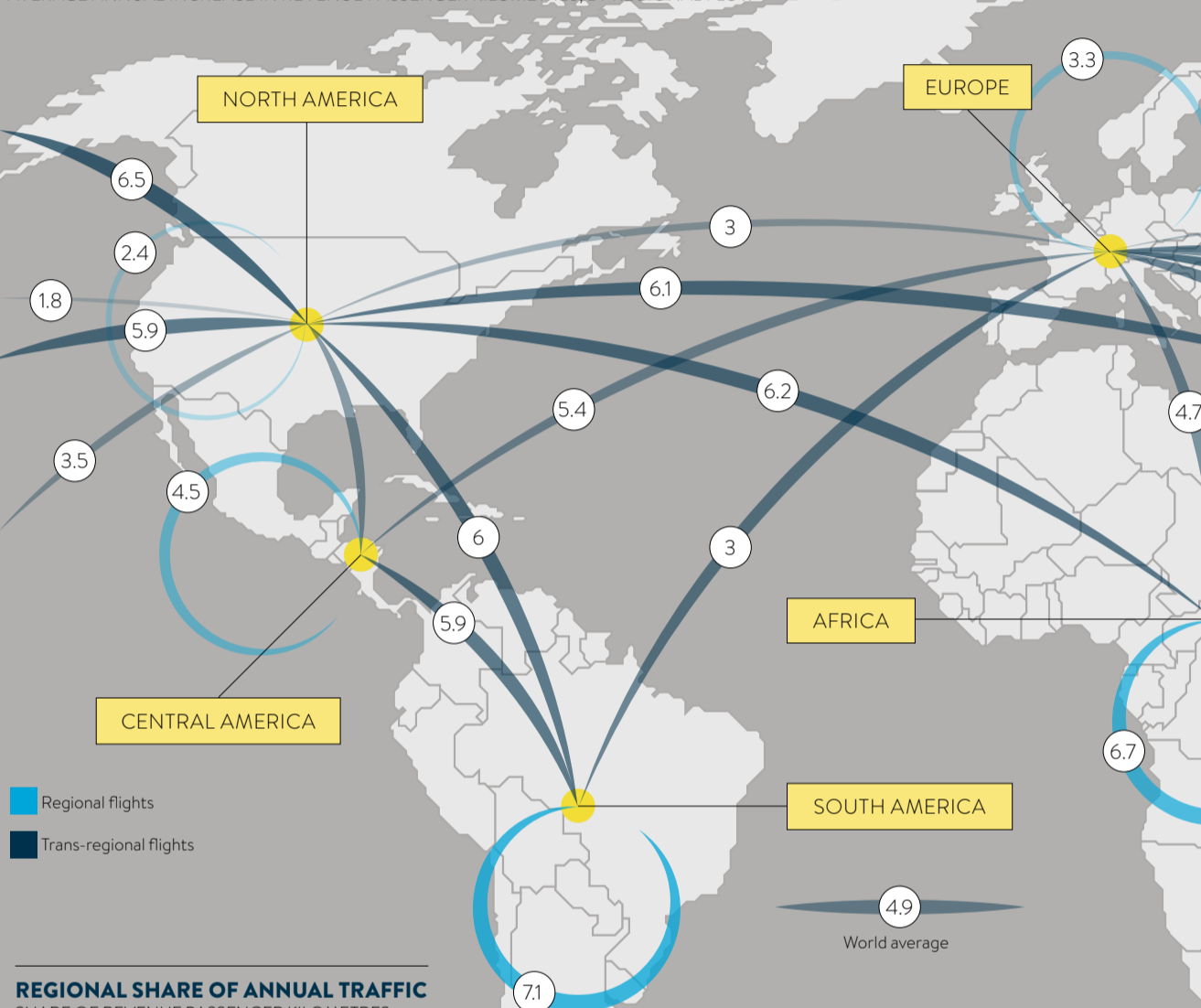
their local airport and seek its continuing expansion. However, as Mr Taylor points out: “We have Gatwick Airport on our doorstep, but when the traffic’s right we also have Heathrow on our doorstep and by having several airports with capacity, you get more resilience in the connectivity network.”

One of the firms operating within the Gatwick Diamond community is Time 24, a manufacturer of electromechanical assemblies, control panels and wiring harnesses for rail carriages, aircraft simulators and radiotherapy machines, based in Burgess Hill, West Sussex. Time 24’s logistics matrix relies on skilled manufacturing capabilities in the Czech Republic, accessed via the route network of Ryanair which, in addition to catering for the leisure traveller, flies to some of Europe’s lower-cost industrial zones, remote from the more conventionally attractive tourist hubs.

This has been a game-changer for Time 24. “Ryanair is providing competitive links into the heartland of Czech industry,” enthuses the firm’s managing director David Shore. “We are achieving excellent business growth with a model that combines our UK site providing value-added manufactured systems, supported by our Czech facility providing quality assembly work at a third of the labour costs of the UK. Being able to fly there and back to industrial cen-

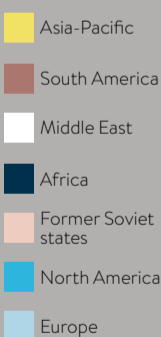
AIRLINE PASSENGER TRAFFIC GROWTH FORECAST 2014-2034 (%)

AVERAGE ANNUAL INCREASE IN REVENUE PASSENGER KILOMETRES, BY REGIONAL FLOW



REGIONAL SHARE OF ANNUAL TRAFFIC

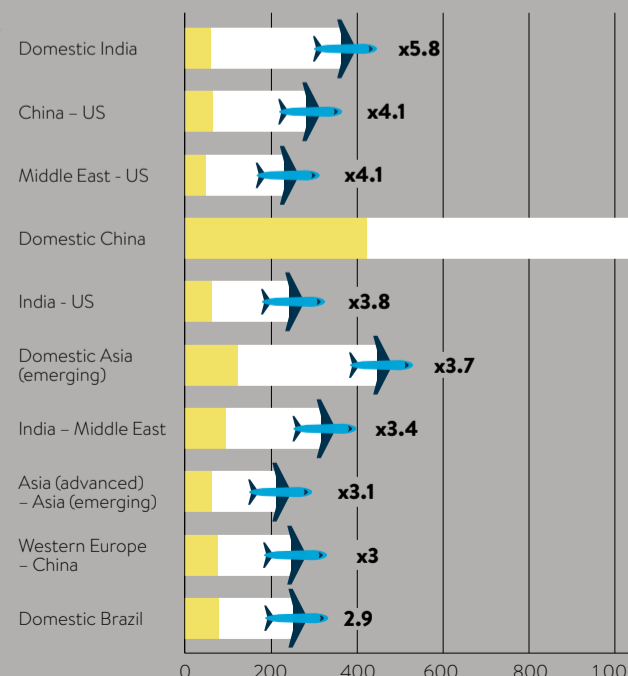
SHARE OF REVENUE PASSENGER KILOMETRES



Source: Sabre/Airbus

TOP 10 FASTEST-GROWING ROUTES 2014-2034

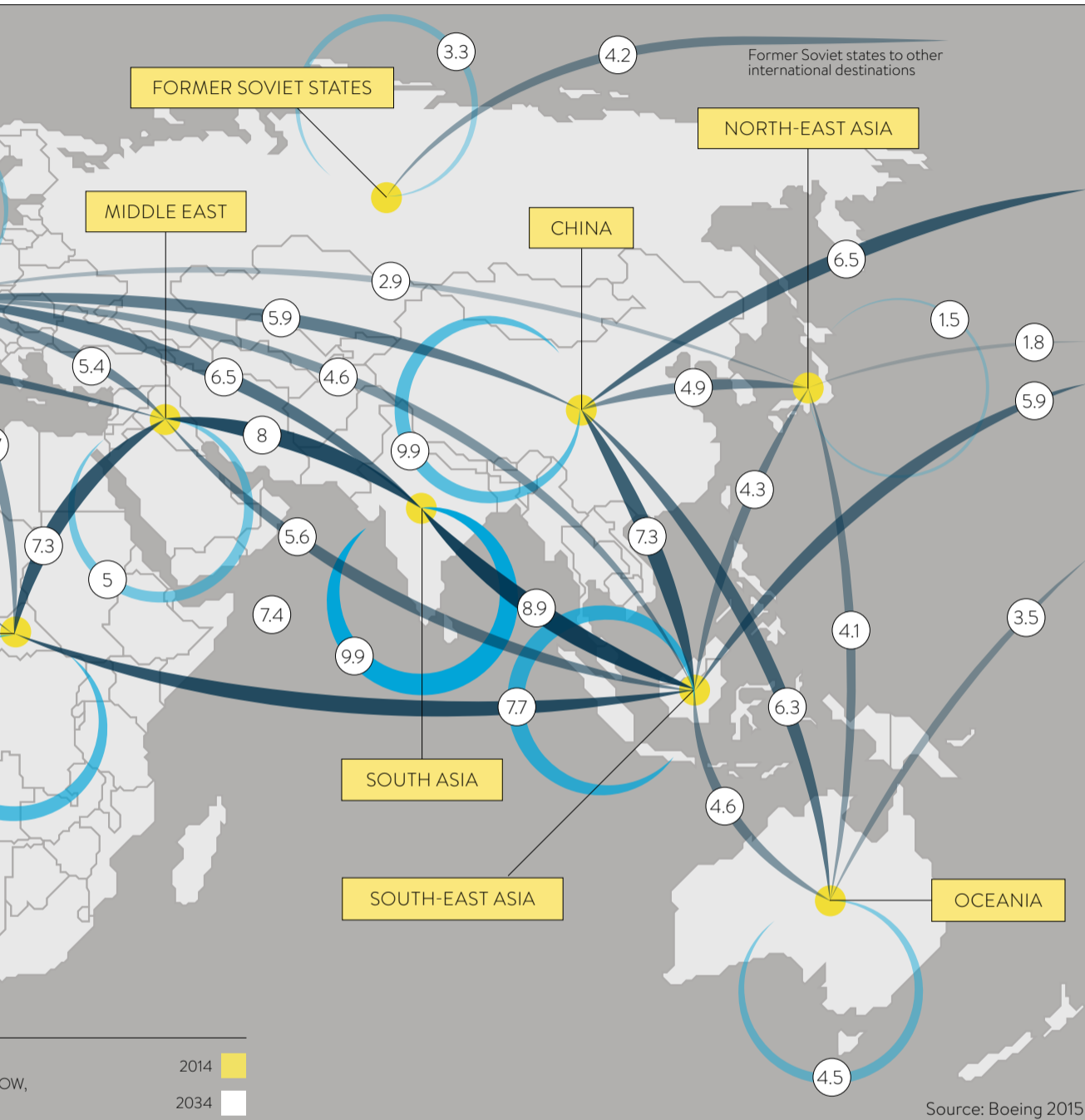
CALCULATED IN ANNUAL ORIGIN AND DESTINATION TRAFFIC PER FLIGHT IN REVENUE PASSENGER KILOMETRES



Source: Airbus 2015

Open new markets for UK exports

overseas links in their supply chain



tres such as Brno and Ostrava for less than £80 is invaluable.”

Established companies benefitting from the ubiquitous route networks of low-cost carriers is a compelling business model, but what happens when a legacy carrier considers testing an entirely new route and what kind of opportunities does that present to smaller, less entrenched businesses?

Last year, United Airlines decided to inaugurate service from Newcastle International to New York’s Newark Airport, initially running a spring-autumn season from May until September.

To reach international markets, the North East relies heavily upon air travel for connectivity. As David Laws, chief executive at Newcastle International Airport, explains: “The United States is a major market for North-East exports and imports, so we have been seeking a US route for a number of years. The route started last year and there was good demand from businesses in the region, and we were delighted by their response to this service.”

Mr Laws hopes that United’s testing of the waters will emulate the success of a previous initiative that Emirates took when it launched a Newcastle-Dubai service a few years back. “The Emirates route has been hugely successful in opening up business opportunities to the East via the Dubai hub and we expect United’s New York route to be a similar catalyst to the West,” he says. “When Emirates first arrived in the region in 2007, flown exports from the airport stood at around £20 million. Since then, the value of exports flown from the airport is £310 million, mostly generated via the Emirates service, which highlights the transformational effect a single long-haul scheduled service can have.”

For one particular startup in the region, the Newcastle-New York route presented a unique opportunity. A group of University of Glasgow and Strathclyde University graduates formed a company called MindMate, which defines itself as “the fastest-growing platform in the \$818-billion Alzheimer’s industry”. With funding from Ignite Incubator, the UK’s startup accelerator network, MindMate was part of a mission comprising nine UK startups that were flown by Ignite on a trip using United Airlines’ new route. The objective of the trip was to prepare MindMate and other startup companies for US market entry. While there, MindMate also participated in mentoring sessions and demonstrated their family of apps to Microsoft and Foursquare.

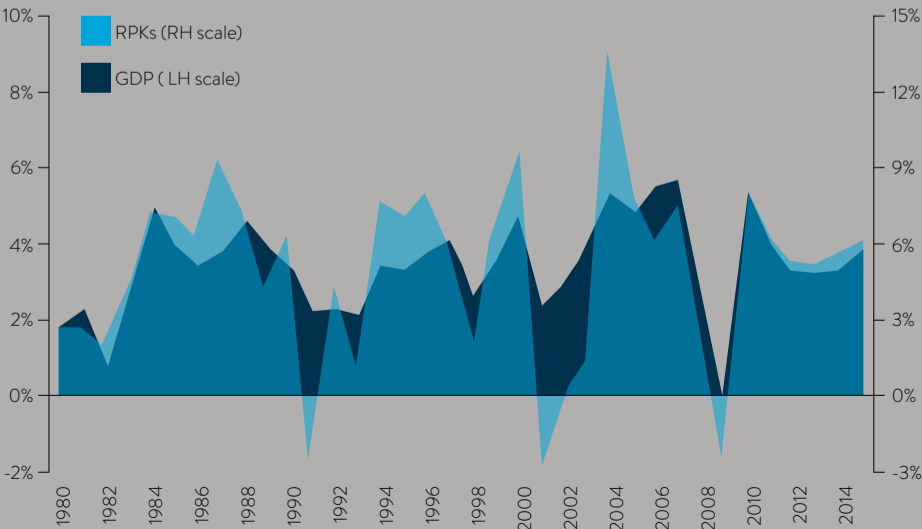
MindMate co-founder and managing director Patrick Renner recalls: “During the mentoring session with Microsoft, we met one of our business advisers who is currently helping us with our expansion strategy in the US. We’re going to travel to New York again very soon and this becomes a lot easier when you have the opportunity to get a direct flight from Newcastle.”

That’s a sentiment endorsed by Newcastle International Airport’s Mr Laws, who says: “The United Airlines service to New York was a route we were determined to deliver for the North East. We have been very pleased with the way in which the operation has performed, and with the response of the individuals and businesses who have taken advantage of the service. In the past few weeks, many people have been asking us whether the service will return in 2016, so I am delighted to be able to confirm that it will be back.” United’s Newcastle to New York Newark service will run a second season this year, six times weekly, starting in late-May.

Source: Boeing 2015

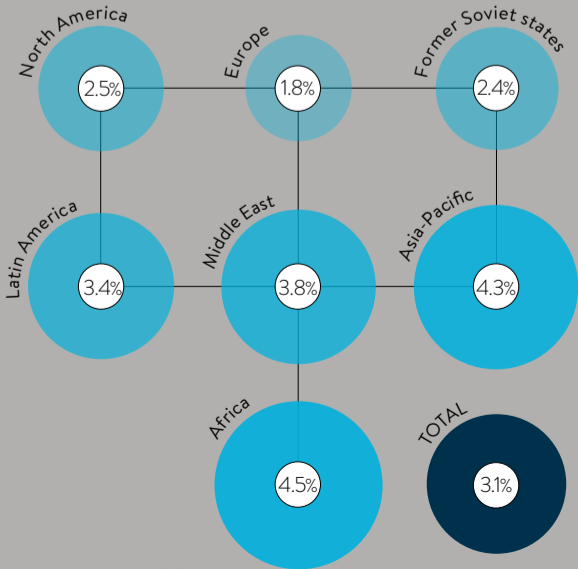
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CORRELATION BETWEEN GDP AND AIR TRAVEL GROWTH
ANNUAL CHANGE IN GLOBAL GDP AND AIR TRAFFIC IN REVENUE PASSENGER KILOMETRES (RPKS)



Source: IMF/ICAO/IATA 2014

ANNUAL GDP GROWTH 2014-2034 (%)



Source: IHS Economics 2015

Can supersonic 'thump' back in

A second-wave of aviation could be quieter supersonic jets or slower and cramped airliners where virtual reality heads

SECOND WAVE

TRISTAN McALLISTER

In 1976 few things seemed more likely than a future with supersonic airliners. That's the year Concorde first flew commercially. The jet could cruise at more than two times the speed of sound and was said to be the beginning of aviation's second wave, fundamentally changing how travellers would move around the planet. Just six years earlier American manufacturer Boeing rolled out its venerable 747, a subsonic jet that was also hailed by many as the future of air travel.

The two aeroplanes, birthed just years from one and other, represented very different bets on the future of flight. One was a wager on speed – the inside of Concorde was surprisingly cramped – and the other, extreme passenger comfort and size – think piano lounges, wide seats and plenty of space to stretch out for the long haul. In the end the subsonic bet paid off and today's jets, while markedly more advanced, are still iterations of those like the 747 built nearly half a century ago.

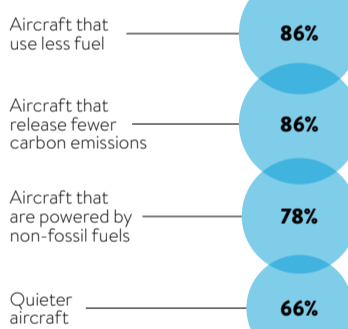
Simply put, Concorde couldn't beat the noise generated while harnessing its renowned speed. At supersonic speeds the jet produced a loud and eardrum-threatening sonic boom. Such booms over land were banned by many governments in the 1970s, which meant Concorde could only be fully utilised over open water.

"If you can't get past the boom, then the rest doesn't matter when it comes to commercial transport flying supersonic over land," says Rich Wahls, senior technical adviser for Nasa's Advanced Air Vehicles Programme. Add to that the high cost of operations, as well as a deadly crash, and there wasn't an airline willing to keep the jet in the sky.

Teams at Nasa have spent decades trying to get supersonic technology past the boom, the rocket-worthy fuel costs and the CO₂ emissions. In late-February the agency announced the Quiet Supersonic Tech-



MOST APPEALING AIRCRAFT INNOVATIONS TO PASSENGERS



Source: Airbus

nology programme in partnership with Lockheed Martin that would build a demonstration aircraft incorporating Mr Wahls' research on reducing the sonic boom.

"This demonstrator is very specifically targeted at producing a low boom and showing that we have the tools to make a design that will be quiet," says Mr Wahls. Some of his colleagues are even keen to see the less menacing term "thump" replace "boom" when the jet is slated to begin test flight in 2020.



If the noise tests are successful – and the boom is in fact a thump – we are likely to see an all-new, sound-legal supersonic passenger jet in the near term. Add to this multiple privately and publicly funded supersonic projects studying the potential for alternative propulsion systems such as hybrid or electric engines, and supersonic transport as a second-wave aviation proposition starts to have real potential.

As for getting airlines interested, Frantz Yvelin, founder and chief

01 Nasa announced in June 2015 that it would invest \$2.3 million in research for commercial supersonic flight

02 Qantas in January 2015 became the first airline to trial virtual reality entertainment, through a partnership with Samsung

executive of boutique transatlantic airline La Compagnie, has a few thoughts. "If we could imagine a plane capable of carrying at least 100 passengers, in a full business class configuration, having at least a 4,000 to 4,500 nautical mile range, burning no more than three-and-a-half tons of fuel per hour, while being able to reach and keep a speed one-and-a-half-times the speed of sound, solving the issue of the sonic boom, and keeping maintenance costs similar to a Boeing 737 or an Airbus A320, there will undoubtedly be a strong interest," he says.

In the aviation world, that's a sky-high, but expected, order. La Compagnie's disruptive, all-business class product from New York to Paris and London would surely benefit from a quiet, cost-effective supersonic option for its fleet.

But how these aircrafts actually move themselves cleanly, quietly and swiftly through the sky is just one part of the equation. Inside

aeroplanes you've undoubtedly noticed that things have become a bit more cramped and that a true luxury might actually be getting to your destination as fast as possible. Unless, of course, you're sitting in a premium cabin where showers, private suites, on-board chefs and full cocktail lounges are finding their way aloft.

For those left to fight over the scraps in the aft, there is a long line at the loo or a screaming, sleep-averse toddler at the bulkhead. Fortunately Boeing just announced a lavatory that cleans itself with UV light. Still, there doesn't seem to be an easy remedy for those cranky toddlers.

The point is, as more of us get packed into these spaces, it only gets increasingly uncomfortable. And airlines don't seem too concerned about the disappearance of leg-room. After all, less leg-room means more seats to sell. This presents some interesting challenges for innovation when it comes to the interiors of passenger planes and it will surely be central to conversations at April's Aircraft Interiors Expo in Hamburg.

At last year's expo many of the cabin enhancements on display went beyond the physical. Piggybacking on the three-year European Commission-funded virtual reality in aviation project, VR-HYPERSPACE, many discussions at the 2015 event focused on how you might distract a passenger close to his or her limit in terms of tolerating space or a lack thereof.

According to some of the leading in-flight entertainment companies, a cramped flier could slip on a virtual reality headset and suddenly be "sitting" in first class. Or be transported to a digital beach, replete with sand, sun and the soothing sound of waves, all but forgetting about being jammed

“
A cramped flier could slip on a virtual reality headset and suddenly be 'sitting' in first class
”

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n the skies?

sets distract passengers from their discomfort

TAKE-OFF FOR VERTICAL LANDINGS?



Tesla Motors and SpaceX chief executive Elon Musk (pictured) is yet again provoking the aerospace industry. In February he told an audience at Texas A&M University about his thoughts on a vertical take-off and landing (VTOL) electric jet concept. While he was mum on specifics, he said: “I’m quite tempted to do something about it.” This certainly turned the heads of people who wonder when we might see a passenger aircraft that has little need for runways.

A VTOL has been in the sights of a few aerospace firms for some time. Makers such as Boeing and Bell Helicopter have teamed up to build military aircraft like the V-22 Osprey. The vehicle can take off and land vertically, and fly like a conventional aeroplane. Still, while performing well

now for the military, they had a tough introduction a decade ago with many reliability issues and some fatal crashes. Many industry watchers think it will be some time before any such technology is applied to the commercial aviation sector, especially if the propulsion is to be electric.

If the technology were to take flight it would herald a new age in commercial aviation. Eliminating the need for costly and space-hogging runways will render many airports obsolete or simply allow passengers to hop on a flight at places akin to a heliport. And quieter, electric propulsion would mean getting around noise restrictions at major global cities. Needless to say, Mr Musk is not likely to be investing in airports anytime soon.

like cattle in the back of a wide-body jet. But many wonder if this is true innovation. After all, there was a time when sitting in your seat and taking in what was actually around you was inspiring, if not downright magical.

If virtual reality indeed becomes an acceptable way to distract the flier, that might leave aircraft interiors to become highly efficient, lightweight and less than human. This is certainly a possibility if the value engineering trends associated with lighter seats, tighter cabins and fire-retardant materials continue.

Some industry thought leaders, such as aircraft interiors specialist Paul Wylde, take a more civilised approach when it comes to finding new ways to make the on-board experience more efficient and humane.

“The key may well be in profoundly important developments in the ‘micro’ and unlocking the power of bespoke, intimate and localised experiences,” says Mr Wylde, founder of paulwylde, an aircraft interiors consultancy that has worked with Air Canada, Hawaiian Airlines and British Airways. “These can be activated through enhanced connec-

tivity, intelligent devices, sensors, the capturing and meaningful application of relevant data, and using new technologies to improve person-to-person customer service. The sum total being to individually customise personal spaces in a way not yet seen.”

Mr Wylde argues that interior enhancements like these will become even more critical as demographics shift and more elderly fliers take to the skies. “Airlines should build the needs of all passengers – you and older – into their values, mission and R&D strategies,” he says.

Some might say it’s sad if slower jets with shrinking cabin space are the winners in the commercial aviation race. But it also seems a valuable lesson. Patience with the speed of your flight or simply the elderly person holding up the aisle may be the only way forward. Regardless, all bets are on the promise that a second wave of aviation will one day get us there faster and more efficiently, distracted or not.

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COMMERCIAL FEATURE



COMBINING ONLINE WITH PERSONAL SERVICE

Why blending expert advice with online pricing is the winning formula for the private jet charter industry

Over the past five years or so, more than \$100 million has been invested in online charter broker platforms with the idea being that you can book a private jet charter in the same way you are able to book a regular, scheduled flight on Expedia.

Most of these companies have gone bust. One particularly high profile example, backed by an internationally renowned airline, reportedly lost more than \$30 million in the venture and the rest have made little impact compared with the investment ploughed into them.

So why have these companies not made more of a dent in the overall charter market?

Established private aircraft hire business, Air Charter Service (ACS), believes the success of its strategy, combining online pricing systems and award-winning personal service, may be the answer.

This new breed of online aircraft chartering startups say they offer simplicity and convenience, with dozens claiming to be the “Uber of the skies”. But hiring a plane is not

We are offering customers the best of both worlds – top-level technology on the website that tells them what is on the market, complemented by personal advice from our staff

like booking a taxi or a conventional air ticket – there are many factors to take into account. With up to 50,000 charter planes to choose from, which one suits your needs? Is the carrier reliable? Who do you call if something goes wrong? Will your skis fit in the hold? What about owner release, airport slots, parking, and so on?

James Leach, marketing director at ACS, explains: “There are so many variables when booking a private jet to fly on your own schedule and most of the required information is not yet digitised. Not only that, but in order to guarantee their prices online, aircraft operators need to build in pricing contingencies.

“This means that while it is possible to book online, you’re actually more likely to get a better price by speaking to an adviser who will go directly to the best operators and negotiate an actual price.”

ACS has already invested in expanding the number of specialist advisers throughout its global network of offices and at the start of 2015 pledged to invest £10 million over the next five years in its charter technology to continue its expansion.

The first step in ensuring their continued success was relaunching their websites. They have achieved a 15 per cent increase in new customers since then, adding up to some 1,800 new customers last year, which in the charter industry is a significant number. The sites now feature a state-of-the-art pricing system and attract 100,000 unique visitors every month.

ACS also has an extensive six-month specialist training programme during which their customer advisers study the legal, administrative and safety requirements of air travel,



James Leach, marketing director, ACS

and become acquainted with the hundreds of models of planes that are available for charter. Mr Leach believes such in-depth expertise is the key to the gains in market share the company has experienced.

“We are offering customers the best of both worlds – top-level technology on the website that tells them what is on the market, complemented by personal advice from our staff,” he says. “We have found the ‘look online, buy after to speaking to us’ combination is particularly popular with first-time bookers, personal assistants and travel professionals, who want to be reassured that their every question can be answered.

“People love online shopping, but as is the case with cars, houses and high-value items, they like to talk to someone in the know before parting with a large amount of money – and this is exactly what we offer.”

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Connect to a hi-tech office in the sky...

Turning a once unproductive journey into valuable office time is becoming a reality as more aircraft are equipped with reliable internet access

FLYING OFFICE
ELIZABETH MOSCROP

I hate to do this to you in March, but remember the horrors of Christmas shopping? The congested malls? Packed escalators, side by side, carrying hordes of people from floor to floor? Picturing that? Bingo – you have captured what's happening when several packets of data are trying to reach your iPad at peak time. To add to the fun now have your shoppers jostle through a tiny tunnel at the end of their journey. Bounce them around and hurl them through the air at 500mph.

So can you imagine the added complexity of getting these packets of data to a tiny moving target bouncing around at mach 0.65? The science of turning your aircraft cabin into an extension of your office is nothing short of a modern miracle.

Unsurprisingly what is happening in the air reflects what's happening on the ground and service providers report that the most common internet usage is for e-mail, web browsing, news and social media, in particular Facebook, Twitter and LinkedIn.

Rockwell Collins offers a range of integrated hardware and service solutions to get internet on to an aircraft. James Hardie, Europe, Middle East and Africa director for information management services, explains: "It really becomes just like any other office on the corporate network, or home office or even hotel wi-fi.

"It increases the flexibility of available work environments. This effectively increases the value of the aircraft, as it is no longer an unconnected environment. The options to work collaboratively with people on the ground, conduct conference

calls or just answer and get replies to important e-mails are all the basics that we expect of any office."

If you're looking to add connectivity to your business jet or to charter an aircraft with the capability on board, it may be helpful to understand that there are different levels of satellite service offered via the L-band and Ku and Ka bandwidths. The bands refer to the radio frequencies used to deliver data to and from the satellite. L band uses the lowest frequency. Inmarsat offers its 432kbps SwiftBroadband on the L-band service, as well as a lighter version 200kbps SB200 service for business aircraft.

Today's chart topper is Ku-band, which is offered through a world-

wide patchwork of multiple service providers, including television and other media. This hotchpotch of providers is the main reason why travellers sometimes experience slow and inconsistent access mid-air. Panasonic, Gogo, Global Eagle and ViaSat Yonder all offer Ku, which has connection speeds of around 1-2 Mbps.

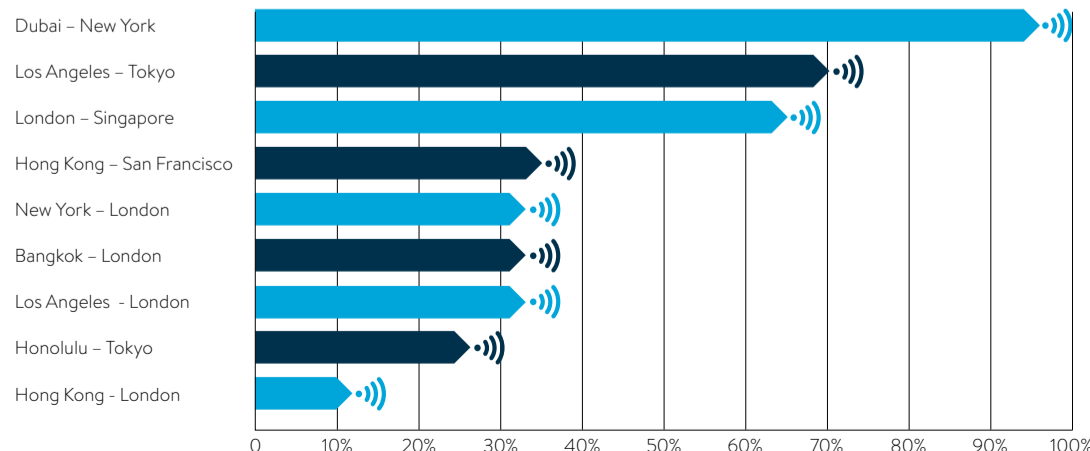
“Business aircraft passengers now have an expectation of on-board internet as it proliferates in carriers in the US, Middle East and Asia in particular

The new kid on the block coming online this year is satellite provider Inmarsat's Global Xpress Ka-band service. In terms of speed and bandwidth, this is internet today after it's trained for a marathon. However, it requires a special antenna to reach the finish line. That's coming, too, courtesy of Honeywell Aerospace. If you're thinking of ordering one,

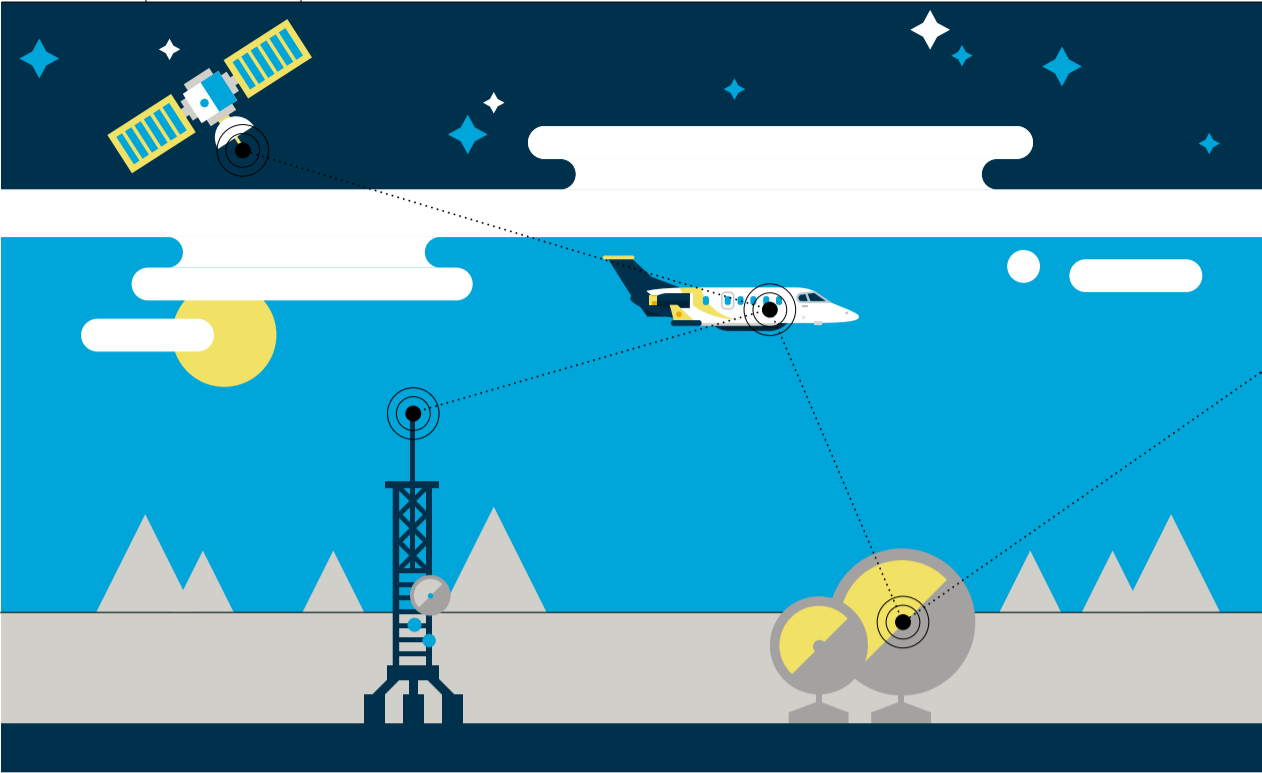


Interior of the Dassault Falcon 7X business jet

CHANCE OF IN-FLIGHT WI-FI ON BUSIEST LONG-HAUL ROUTES



Source: Routehappy 2016



bear in mind any extra equipment added to an aircraft requires a Supplemental Type Certificate (STC) to ensure it meets strict safety requirements. In January the US Federal Aviation Administration certified the manufacturer's JetWave system to fly on the Boeing 757.

This certification paves the way for its installation on several other aircraft types which, according to Honeywell Aerospace's vice president of safety and connectivity Jack Jacobs, should mostly happen by the end of this year. Business jets coming online include the Bombardier Global 5000, which has already been fitted and the Dassault Falcon 900, since this is Honeywell's own in-house jet. Mr Jacobs says Ka will "provide passengers with high-speed, wireless connectivity comparable to their earthbound experience".

Mr Hardie agrees. "Ka is important. It will support more devices in simultaneous use at acceptable connection speeds for many common functions. This availability brings an equipped aircraft a step closer to the ground-based capabilities that we are all used to and makes this capacity available to more people on board," he says.

Business aircraft passengers now have an expectation of on-board internet as it proliferates in carriers in the US, Middle East and Asia in particular. According to data provider Routehappy, some 36 per cent of available seat miles are now offered with connectivity. So the service has struggled to keep up.

Leo Mondale, president of Inmarsat

Aviation, says: "Airlines have previously struggled to meet the expectations of modern-day passengers for reliable, efficient, high-speed connectivity on board flights, due to the lack of available technology. The entry into service of GX Aviation this year will mark an important turning point."

Derek Donahue, regional director Eastern Europe, Middle East and Africa for Satcom Direct, points out that

although reception is vital to passengers, it goes unnoticed in most scenarios, just as it does on the ground. "It just needs to work" tends to be the mantra from business aviation passengers," he says.

All three bandwidths can be beautifully integrated into business aircraft cabins. Companies such as Lufthansa Technik, Rockwell Collins and Honeywell collaborate with interior designers to create state-of-

the-art cabin management systems that seamlessly fuse the connection to the outside world, with speakers added seamlessly into headliners, large bulkhead monitors and discreetly hidden tiny routers.

The major aircraft manufacturers are all well up to speed, too. Gulfstream's flagship G650 comes with a broadband multilink high-speed

data system, and a wireless local network that provides on-board printing, additional internet access and phone service. The manufacturer recently added Satcom Direct's router to its G550 and G450 aircraft.

Dassault, meanwhile, offers OnAir's inflight connectivity as a feature on its business jets, which enables passengers and crew to make and receive calls, text messages and e-mails, via their mobile phones. Embraer and Bombardier provide connectivity as standard options on their new aircraft. Most also offer packages to retrofit their older types.

On-board internet can still be a reasonably pricey proposition, depending on usage. Mr Donahue anticipates that as more aircraft transition to the newer technologies over the next 12 to 24 months, the cost will come down substantially. He cautions: "This does not always lead to lower operating costs, however, as passengers will soon have access to much larger bandwidth, and therefore a much wider range of activities and applications such as TV in flight."

That is a point worth noting, says Mr Hardie: "It's well worth getting the IT department involved from the get-go. Not just in terms of specifying hardware and determining what the aircraft will be used for, but also once it's in use, to work with passengers on how they can get the best out of it."

Mr Donahue adds: "It comes down to cabin bandwidth management and training clients on exactly how their wi-fi devices operate in regards to auto-updates, background applications and so on. In one scenario we've seen an aircraft with one passenger with three devices complaining about internet speeds coming to a crawl. We discovered his iPad had been downloading the latest iOS and had been consuming all of the available bandwidth for the majority of the flight. Conversely we see customer flights with ten-plus passengers where everyone is able to maintain an outstanding experience."

He stresses that if you're planning on chartering a private jet you should ask whether there is internet available and, if so, what type of technology it uses, plus the hugely important question, what is the charge? "This helps set expectations as far as speed and cost of use," he says.

There is a lot to take on board working through the maze of service options on offer. Look on the bright side, though. If all goes to plan and you fly connected this Christmas, you can swerve the malls altogether and do your shopping from the comfort of your aircraft seat.

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CASE STUDY: VITAL FOR BUSINESS



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Alan Peaford is a London-based communications consultant with a large team worldwide, who manages communications strategies, and develops content for clients in Europe, the United States, Africa, the Middle East and Asia. He spends more than 40 hours a month in the air and staying connected is vital for his business. He also

owns a small aircraft and sometimes flies himself to appointments.

"I find it important to be able to stay in touch all the time with the huge amount of e-mails that come into the business. It's so useful to be able to spend eight hours catching up and being able to respond in real time," he says. The ability to get online while airborne has

become such a necessary factor in his working life that wherever possible he chooses a carrier he knows provides a good internet connection. "I get incredibly frustrated when it doesn't work," he says.

Connectivity has helped him in his working life on many occasions. He explains: "I've had incidences where plans have changed while I'm

in the air, and I've been able to make other arrangements and get people to be where they're supposed to be, and saved lots of frustration at the other end."

For Mr Peaford being able to get online also enables his team, which comprises specialists operating remotely all over the world, to work with him in real time. It has also helped him to deliver the news on time. "The Canadian radio station CBC actually got hold of me on an Emirates flight desperate for a comment," he says. "The phone rang on the aircraft. Unfortunately there was not a strong enough signal to do a radio piece, but I did it when we landed. They wouldn't have waited if they couldn't have got hold of me in the first place."

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COMMERCIAL FEATURE

THE PERSONAL TOUCH WITH A CUSTOM FINISH

Akira Mitsumasu, Japan Airlines vice president of marketing and strategy in Asia and the Oceania region, discusses emerging trends in air travel – and the personal touch



JAPAN AIRLINES

With increasingly sophisticated use of analytics to personalise travel experience, it is reasonable to imagine that airlines will focus on expanding their repertoire of product and service offerings to customise value propositions, and make them more relevant and compelling.

After all, it makes little sense knowing what a customer wants, but not having the capability to serve that need. This, however, poses a challenge to airlines as they attempt to unbundle and rebundle their capabilities, often by utilising external resources that suppliers and partners provide.

New and innovative value offerings by airlines could stretch beyond conventional air travel products to include non-air-related ancillary goods and services.

With more options to choose from, consumers too face a new challenge of finding the right product, and making value comparisons across a wide array of different brands, products and channels.

A proliferation of alternatives and options could prompt information

aggregators to reduce customer-search cost by using data to identify the right product for the right customer based on his or her search criteria and preference profile. This in turn could drive travellers into becoming more and more airline brand agnostic in their purchasing process.

Although airlines will continue to personalise and customise products and services, the time and cost needed to produce different variations to suit different needs may become prohibitively expensive and unaffordable.

As product life cycles become shorter, many novel ideas and products quickly become imitable by other airlines too. Yet, at least for full-service airlines, it seems there is little choice but to invest to stay ahead. This challenge brings me to think of the less imitable side of airline competencies and in particular human service.

It is important for airlines to understand customer needs not just in terms of air transport from point A to point B, but to zoom out



If I am to name just one thing that is quintessentially Japan Airlines, that would be the just-for-you *omotenashi*, Japanese-style hospitality service

of the air travel experience and endeavour to understand the wider value in context.

To a business traveller, for example, air travel is just a part of his or her value creation activity, which could be something like closing a multi-billion-dollar contract with an investment partner abroad. How an airline fits into the business traveller's value creation activity depends on that person's needs and it often goes beyond just the trip.

Although this may sound very straightforward, people often fail to see that all value propositions are perceived and integrated differently by each unique individual. To a traveller, the value of the air transport service provided by his or her airline of choice is hence uniquely experienced and determined.

Perhaps all the unique context of all individuals can be summed up with the word "tomorrow" and it is precisely this every person's tomorrow that Japan Airlines strives to be a part of.

However, this elicits the question of how realistic is the idea of personalising service on a one-to-one basis to all customers on a



flight? There is no definite answer to this question as different airlines have different approaches.

In Japan Airlines, we deliver a truly top-class in-flight experience through a combination of competencies from luxurious cabin interior to exquisite cuisine, hospitable cabin attendants, best on-time performance and high safety standards.

But, if I am to name just one thing that is quintessentially Japan Airlines, that would be the just-for-you *omotenashi*, Japanese-style hospitality service.

Just as no contracts can ever be complete, manuals too cannot prescribe all contingencies. This is why in Japan Airlines cabin crew training,

in addition to our regular curriculum for developing skillsets and service mindsets, a heavy emphasis is placed on developing empathetic intelligence, in other words the capability to detect customer needs and to engage accordingly.

It is through this awareness that our cabin crew are able to identify opportunities to be more responsive to individual needs and to deliver the Japan Airlines experience effectively. Earlier, I used the word "quintessentially" because this is indeed the premium *omotenashi* that can be experienced in all Japan Airlines flights regardless of whether you are flying in first class, business class or economy class.

PERSONAL SERVICE AND KINDNESS



When a Japan Airlines domestic flight from Tokyo to Yamagata was cancelled, Hanako – I'm using a pseudonym for her – an off-duty cabin crew member, who originally planned to board the flight,

noticed an elderly lady near the check-in counter who appeared to be troubled. Hanako approached the lady and inquired whether she could help. The elderly lady replied that she wanted to go to Yamagata by *shinkansen* express bullet train, but did not know the way to Tokyo station. Hanako said to the lady that she was on her way to Yamagata too and suggested they go together. Hanako then went with the lady to Tokyo station and together they boarded a *shinkansen* to Yamagata. Later, the elderly lady's family wrote to Japan Airlines to thank Hanako for her kindness. This episode illustrates the just-for-you *omotenashi* spirit in Japan Airlines. It is more than just noticing a need – it is about responding actively.

Sky is the limit with such classy luxury

In a highly competitive market, the big airlines strive to be the best in first and business class luxury, innovating with imaginative design concepts

CABIN DESIGN

JOHN WALTON

Business and first class cabins have always been at the forefront of airline industrial design, aiming to please customers' eyes as much as their bodies. During a period of immense investment by airlines worldwide, new concepts and design inspiration create more space as if by magic from the finite confines of the airliner interior.

Premium services, dating back to the days of Concorde, which flew in a two-two configuration using seats that would now be substandard in long-haul premium economy, have rarely been innovative in their passenger experience because convenience is all the attraction they needed.

This trend continues with some business class transatlantic offerings such as La Compagnie and British Airways' Airbus A318 London City-New York JFK services by no means class-leading in either inflight cabin or seating.

Almost ten years after the introduction of the first class suite, on Singapore Airlines' and the world's first Airbus A380, much business and first class innovation today comes from the large network carriers, most recently and notably Etihad's Airbus A380 and Boeing 787-9 cabins.

First class is starting to move beyond the seat-in-a-suite concept and the Abu Dhabi-based airline's "above first class" three-room The Residence is, Etihad promises, not just a halo product. The Residence is positioned ahead of the innovative and spacious first class apartments, which contain both a plush leather

recliner and a sofa that converts into a bed. The apartment beds are perpendicular to the cabin's single aisle, creating a space wider than it is long. Local rival Emirates has promised to outdo Etihad's products, but as yet has not shown its hand.

Etihad's 787-9 cabins, however, are perhaps even more innovative in their use of space, with a pair of curved aisles and forwards-backwards layout that enable extra shoulder room through the use of smart design. A forwards-backwards layout optimises space in Etihad's business class too, with a staggered effect offering direct aisle access for every passenger.

In the 16 years since British Airways pioneered the fully flat bed in business class, many airlines

have either tried to trump its density or market themselves as more luxurious and spacious. The latter has been more successful than the former, with BA's lack of direct aisle access for every passenger, increasingly the standard for airlines that want to attract the most valuable customer, now feeling long in the tooth.

Direct aisle access is achieved in a number of space-efficient ways. Initially, Virgin Atlantic achieved its direct aisle access goal by angling seats in a herringbone fashion, facing towards the aisle. Later, seatmaker Zodiac Aerospace created the Cirrus seat, facing away from the aisle. US Airways, now American Airlines, launched Cirrus, but the seat was popularised by the Cathay Pacific/JPA Design customisation that American Airlines itself uses on its Boeing 777-300ER aircraft.

One potential option for an airline not convinced it needs a separate

01, 02 New lie-flat seating concept by Formation Design, with elevated staggered beds to make the most of the cabin space

03 Living room of The Residence by Etihad Airways

04 Bar area for business class passengers of Qatar Airways



first class cabin is a new concept from US-based Formation Design that literally raises the best seats above the rest, making the most of the three-dimensional space in the cabin that only Stelia's Equinox 3D seats, as seen on Philippine Airlines, have done in the past. Building on the concept "throne" seats in alternating rows that come from the staggered Vantage seats

designed by Thompson Aero, Formation would quite literally put the best seats on a pedestal.

In addition to aiming to become luxury lifestyle brands themselves, airlines are increasing the number of other marques with which they affiliate themselves. Designer labels such as Ferragamo and Bulgari or upmarket luggage-makers like Rimowa and Tumi, have long collaborated with airlines to produce airline amenity kits. Numerous airlines now work with car companies to transport first, and occasionally business, class passengers around airports, with Lufthansa's First Class Terminal in Frankfurt perhaps the best known example.

The use of luxury furnishing brands such as Poltrona Frau on carriers including Singapore Airlines and Etihad, luxury foods like Ladurée patisserie on Etihad or Balik salmon on Cathay Pacific and Singapore Airlines, and even liquors in Absolut-branded bars on Korean Air's Airbus A380 are all part of this trend.

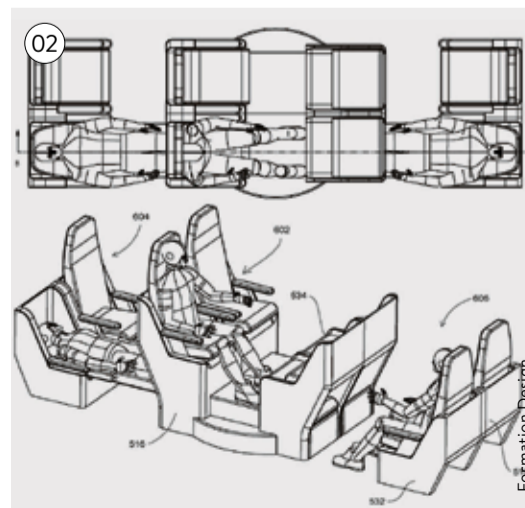
Champagne and wine, of course, have long been an opportunity for

a carrier to demonstrate its dedication to the palates of its first and business class customers, with airlines among the largest consumers of the French fizz worldwide. Dom Pérignon and Krug are *de rigueur* in top-ranked first classes, while more boutique options such as Salon on Japan Airlines and the Perrier-Jouët Belle Époque Blanc de Blancs on some Korean Air routes push the boat out.

New materials, too, enable real-wood flooring, as well as sweeping curves of plastic surfaces that draw from the Eames legacy of modernism and mid-century design. With the likes of Sekisui SPI creating revolutionary thermoplastics that look almost like they change colours in increasingly mood-lit cabins, airlines can use both light and shade to set the scene for luxury, chic or glamorous flying.

Mood lighting also enables changes in the intensity and blue-yellow spectrum of light, which means lights that resemble the warm glow of a tungsten lightbulb during the evening, leading to more restful sleep and a softer, less jarring wake-up call in the morning.

Pulling all these innovations together are the new breed of design house collaborations. All Etihad's latest seats were created by the Etihad Design Consortium, a group incorporating Acumen, Factorydesign and Honour Branding, for example. It's rare these days to find a new business or first class seat being released without a design partner to help combine all the modern materials, airline economics and cutting-edge manufacturing into new and exciting options.





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