



Thoughts on Rebooting Aviation

MACE Survey

About **MACE**

malta aviation conference & expo

MACE was founded in 2019 by 3 founders, the Concept Stadium (www.conceptstadium.com), DC Aviation (www.dc-aviation.com.mt) and novargo (www.novargo.com) as an international aviation conference in Malta. The conference aims to create an environment of collaboration and cooperation in which aviation leaders can come together to help each other succeed, profit and thrive. Over its short lifespan MACE has become Malta's largest aviation event of its kind through which delegates are able to network and enjoy educational and keynote speakers who inspire and share their latest thoughts on the most topical areas faced by the industry.

MACE is an annual event attracting people and companies from all over the world. It aims to continue growing as an event able to balance instructive and current content with networking leading to business opportunities.

If you wish to learn more about MACE you can follow the conference on its social media platforms or visit www.mace.aero,

About novargo

Founded in 2011, novargo is an independent boutique consultancy firm. We offer services in advisory, business support and event management. Our work revolves around our core mission which is “to make what is complex simple”. We believe that when this happens everyone can understand and unite to achieve the same objective and to fulfil this we use a diverse set of tools and techniques designed and customised to fit both the client we are working with and the situation we are facing.

All our research is aimed at providing insights into specific topical subjects using a multidisciplinary approach and combine the skill, knowledge and experience of different professionals while employing rigorous data analytical techniques combined with the insights of professionals and business leaders. All our published research does not necessarily reflect the opinion of novargo or any of its associates and it should not be deemed as advice provided by the Company.

If you are interested in what we offer and would like to connect with us you can do so either by visiting the website www.novargo.com or by sending an email on connect@novargo.com.

Thoughts on Rebooting Aviation

MACE Survey

We asked the industry about its future...

Of whom

138

participated in the survey

Of whom

85%

Male

15%

Female

Of whom

37%

hold senior management
& board positions

27%

hold middle management
positions

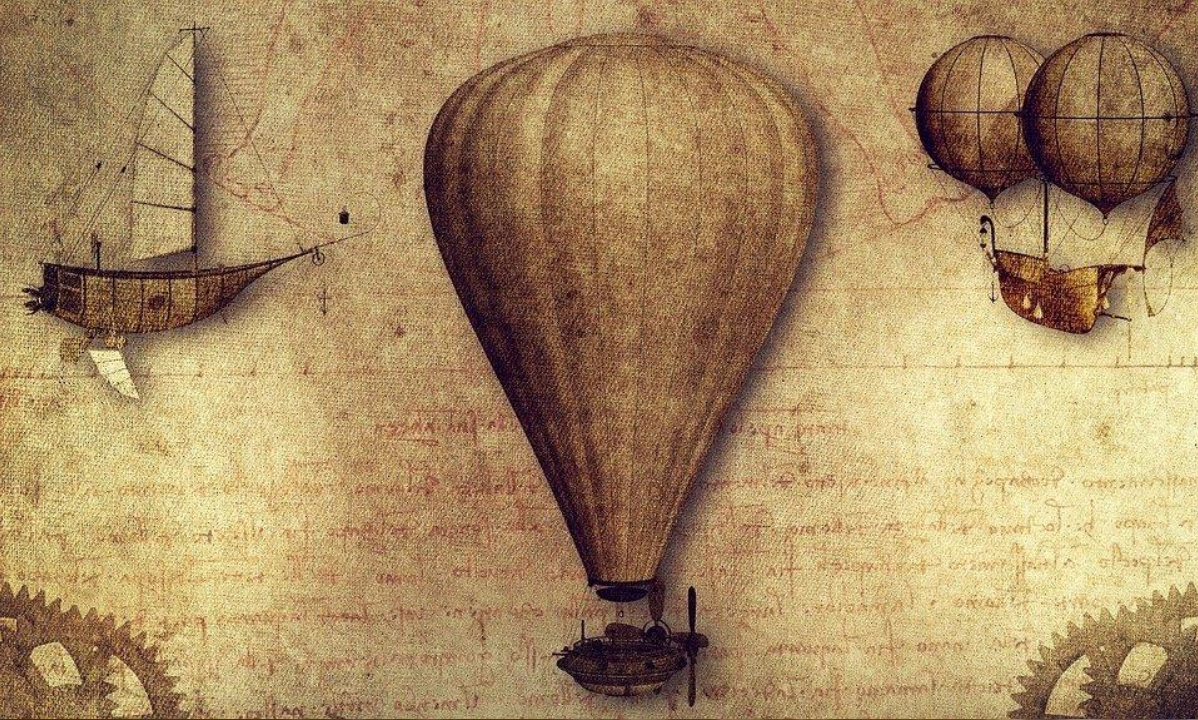
With an average age of

45

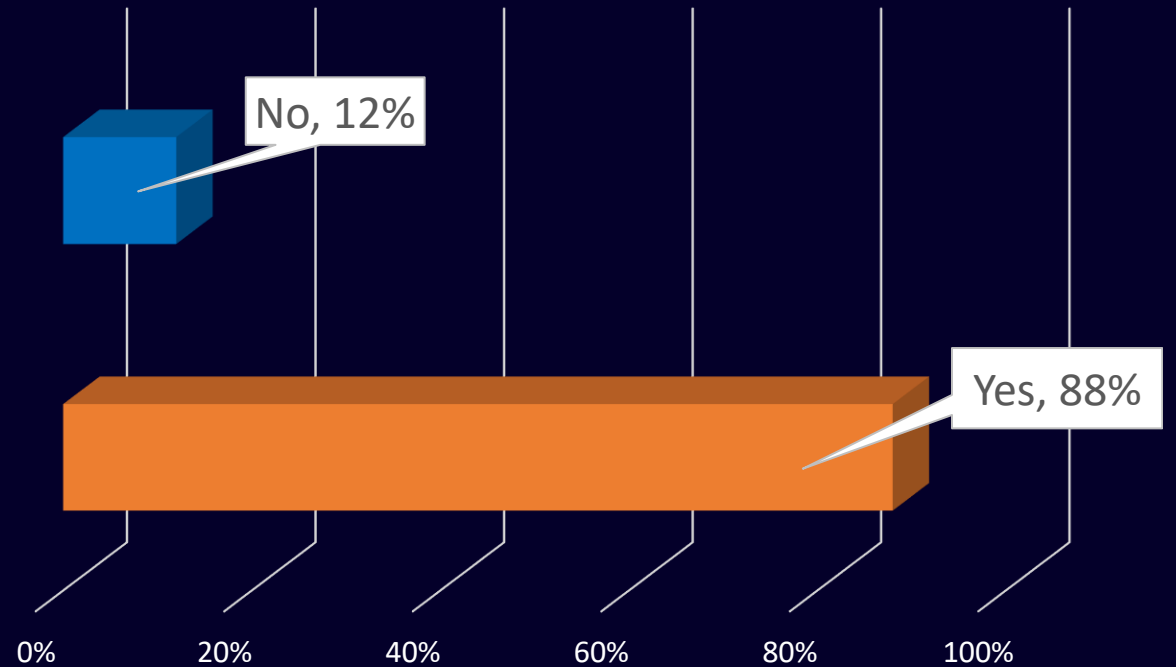
years

Coming from...

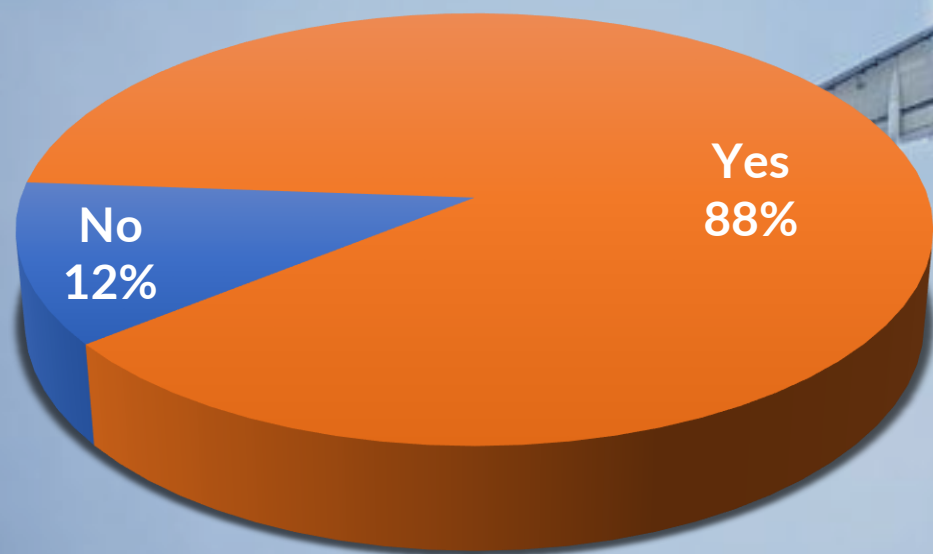




Does the aviation industry need to change the way it works?



Did the pandemic highlight flaws in the industry's business model?

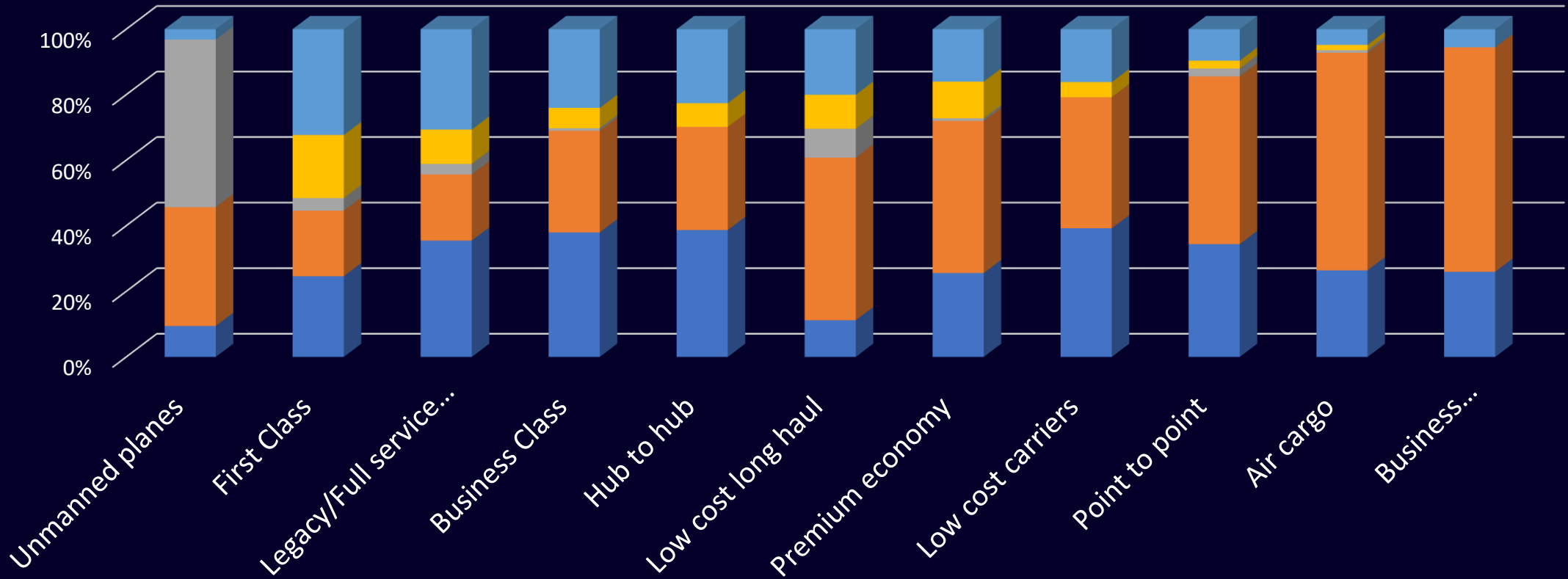


Yes and we were already aware these flaws existed – 50%

Yes but we were not aware these flaws existed – 38%

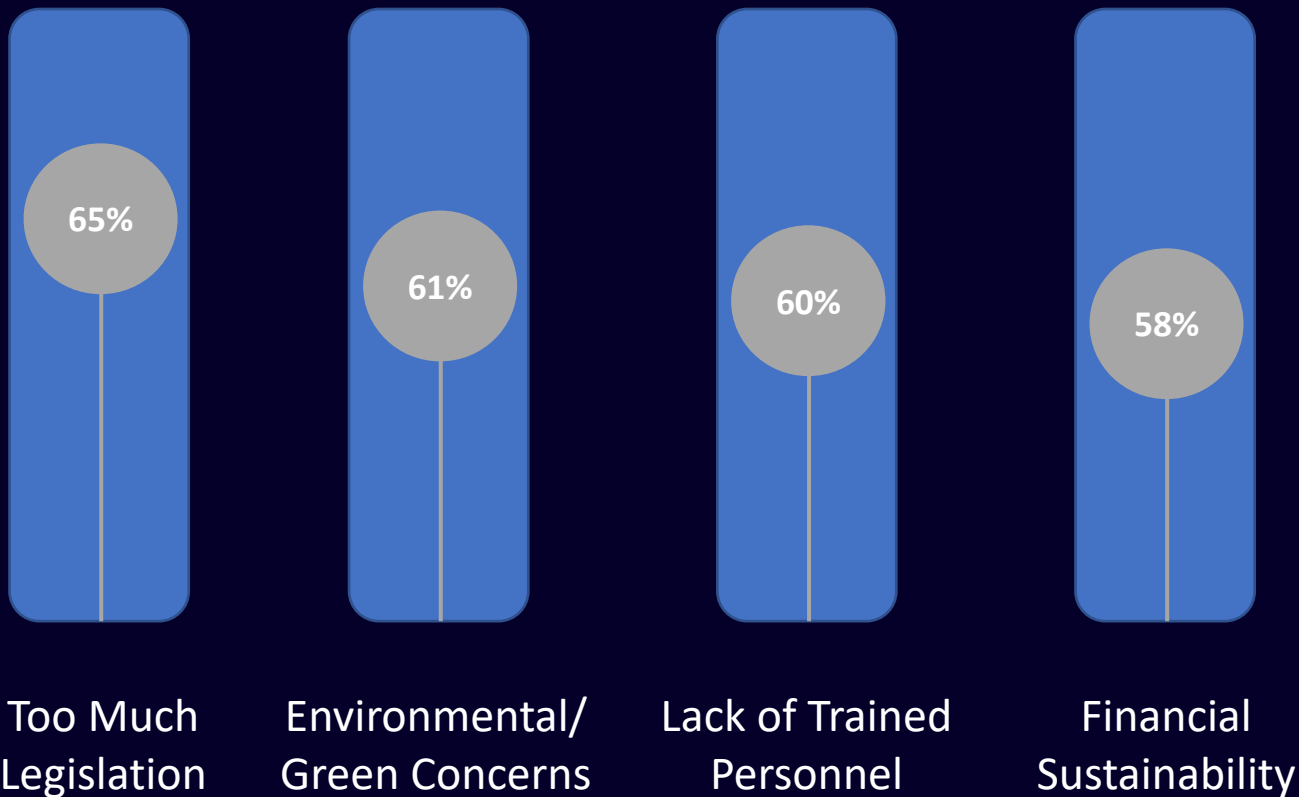
How is the business model shaping up?

■ Here to stay
 ■ Will increase
 ■ Fantasy
 ■ On its way out
 ■ Will decline



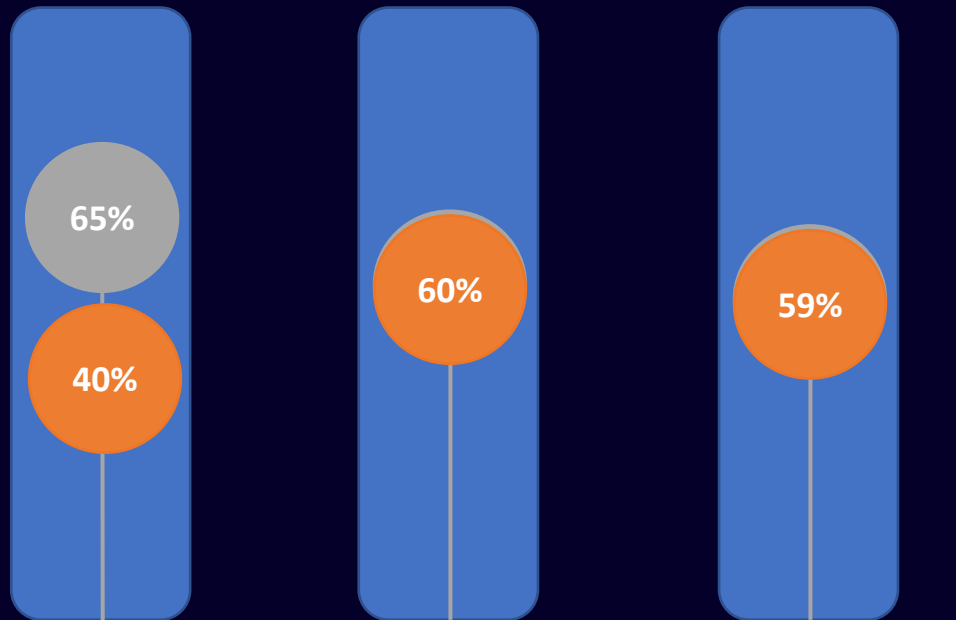
What are the challenges faced by the aviation industry?

Today



What are the challenges faced by the aviation industry?

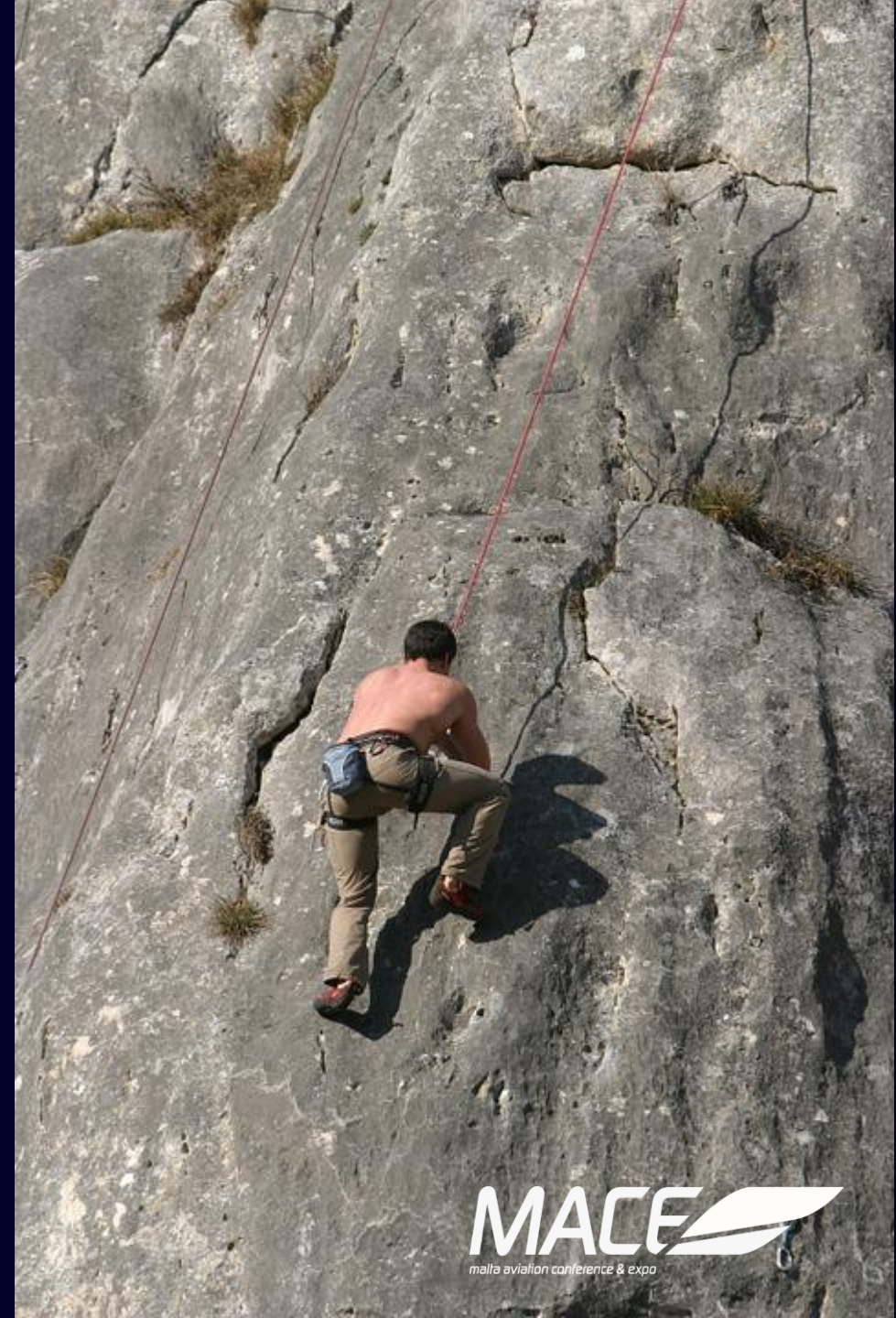
3 to 5 years



Too Much
Legislation

Environmental/
Green Concerns

Lack of Trained
Personnel



How do we reboot the industry?

- 79%** Change the way the industry works and its economics
- 52%** Higher investment in IT & digital
- 50%** Reduce legislative barriers




Technology Adoption

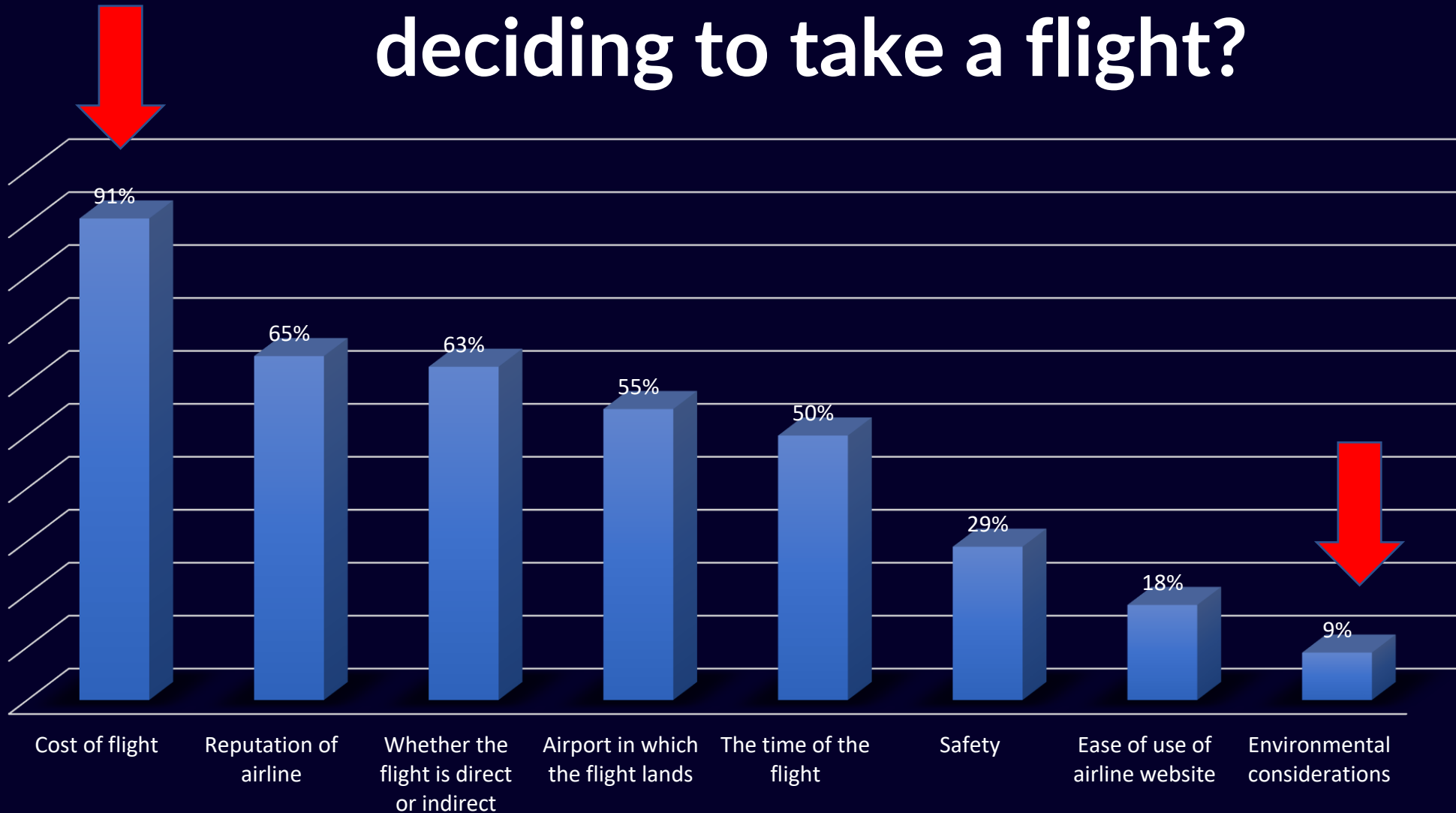
Artificial Intelligence (AI)	48%
Biometrics	38%
Electric propelled aircraft	38%
Composite materials	34%
Big data & analytics	28%
Hydrogen propelled aircraft	26%
Blockchain	25%
Virtual and Augmented Reality (VR/AR)	23%
3D Printing / additive manufacturing	21%
Next generation supersonic	13%
UltraFan engines	12%
Voice technology	10%
Maintenance robotics	7%
Quantum computing	4%

We then asked the industry users for their thoughts...

What are the challenges faced by the aviation industry?

- 
- 59% COVID and COVID related matters
 - 12% Passenger numbers and confidence
 - 9% Staff shortages
 - 7% Costs and pricing
 - 5% Dealing with disruptive passengers

What factors do you consider when deciding to take a flight?



Environmental considerations by aviation users

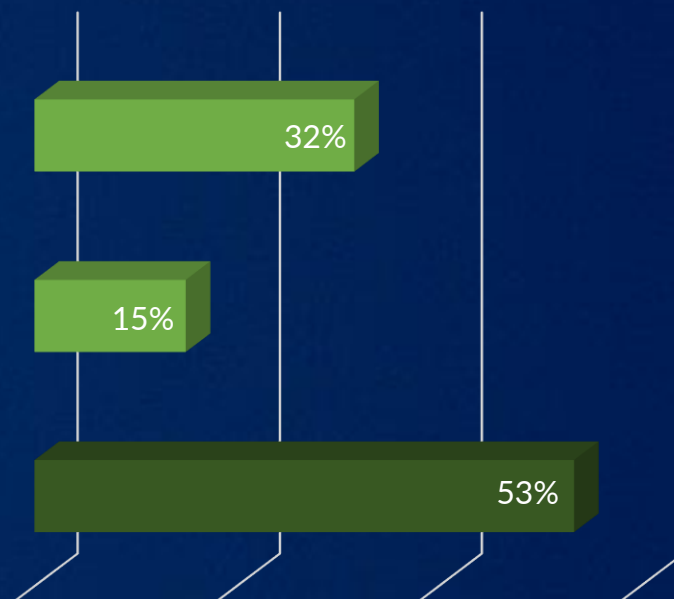
Do you think about the environmental
impact of air travel when flying?



No, flying is not more harmful than
other modes of transport


Yes, sometimes

Yes, often



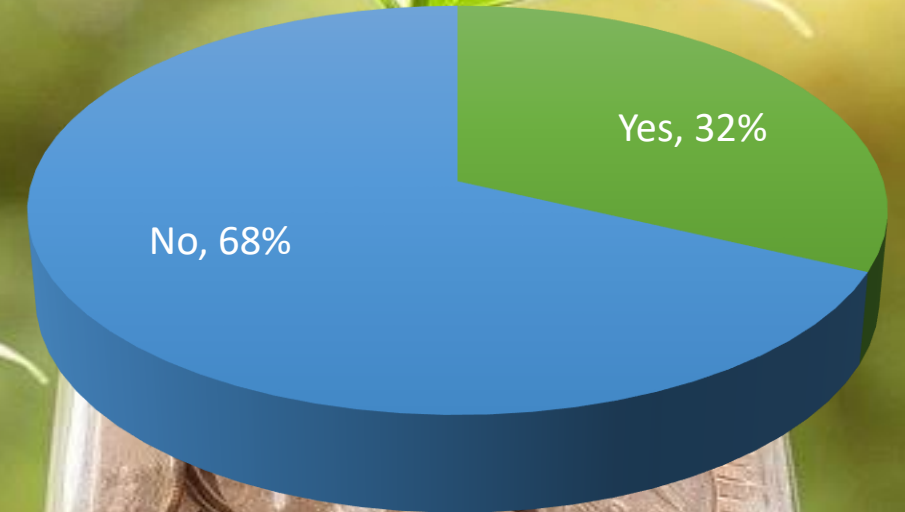
The Environment – what is the first thing that come to mind?

Co2 emissions	25%	Fuel	8%
Carbon footprint	16%	Environmental Damage	5%
Noise pollution	13%	Air quality	5%
Air pollution	12%	Animals and wildlife	3%
Climate change	8%	Greenhouse gases	3%



Cost considerations vs the environment

Are you ready to pay more for your flight to reduce the environmental impact of flying?

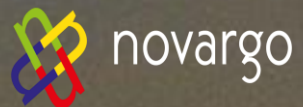


12 Key take-aways

- The way the industry works and its business model need to change
- Low cost is bound to continue evolving
- Unmanned passenger planes considered a fantasy
- Point to point and hub to hub flying will increase
- Legacy / Full service carriers future still uncertain
- Business class will increase and first class will decline
- Business aviation and air cargo are on a clear growth path

12 Key take-aways

- Artificial Intelligence is the most likely technology to be adopted by the airline industry in the next 2 to 4 years
- The challenges faced today will remain for the next 3 to 5 years
- Cost of travel is the main consideration for consumers with majority not ready to pay more to reduce the impact on the environment
- Environmental considerations are low on the priority list of users
- Half our respondents do not consider flying as more harmful than other transport modes



Thank you

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