



INFLIGHT CONNECTIVITY: BRINGING FREEDOM TO THE SKIES

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Inmarsat's annual Inflight Connectivity Survey is the world's largest poll of passenger attitudes. Now in its third year, it has become an industry barometer. Compiled with market research company GfK, more than 9,000 airline passengers were surveyed from 18 countries across Europe, Asia, the Middle East, the U.S. and Latin America.

The findings make three things clear:

- Inflight Wi-Fi is now seen as a necessity, not a luxury
- High quality inflight Wi-Fi drives an airline's ticket sales
- Parents find inflight Wi-Fi a "life-saver" when travelling with children

Passengers want freedom in the skies

In a world more connected and tech-driven than ever before, the aircraft was, not too long ago, one of the only places on earth where we couldn't access the internet.

Some passengers relished the break from always-on connectivity, but in our 2016 Inflight Connectivity Survey, we found that 83% of passengers would prefer to fly with an airline offering inflight connectivity.

Now, with the launch of seamless and reliable inflight broadband brought to passengers through services such as Inmarsat's GX Aviation, technology is finally ready to meet passenger demand.

In 2017, the voice of the passenger has become clear: high-quality inflight connectivity is no longer a luxury, it's a necessity. We expect demand to continue rising as more and more passengers experience air travel transformed by the freedom of inflight connectivity.

For passengers who have experienced quality inflight connectivity before, Wi-Fi has evolved into a clear decision-making factor when choosing an airline, ranked ahead of loyalty programmes and inflight entertainment. Among these users, 40% rank high-quality Wi-Fi among their top three drivers of airline choice, along with price and flight time slots.



Our industry is in the business of freedom. We help people to explore the planet, to do business globally, to bridge cultures with friendships and understanding, and to enjoy better lives through the prosperity that connectivity creates."



Alexandre de Juniac,
Director General and CEO, IATA

Top three drivers of airline choice amongst inflight Wi-Fi users:

- 1 Price (53%)
- 2 Flight slots (44%)
- 3 High-quality Wi-Fi (40%)

Passengers are demanding more



Last year, **83%** agreed: “I would **prefer** to fly with an airline that offers inflight Wi-Fi on board”. In 2017, passengers are unequivocal:

60%

agree that “Inflight Wi-Fi is not a luxury, it is a necessity”, with the figure rising to **71%** amongst inflight connectivity users

So long, seatback screens

Since the nineties, heavy seatback screens have been the traditional form of inflight entertainment. Expensive to install and operate, these systems serve a set menu of movies, TV shows and video games. But as technology evolves and more passengers bring personal electronic devices onboard, inflight connectivity is increasingly in demand. Why? Because passengers can access the same content and services that they have been accustomed to enjoying on the ground – and they love it.

This year’s survey found that the majority (61%) of passengers who have experienced inflight Wi-Fi consider it more important than onboard entertainment when selecting a carrier. Even when we challenged passengers to choose between paid-for online access and free inflight entertainment, nearly half of satisfied inflight connectivity users (45%) said they would rather pay for access to the internet.

61%



of passengers who have experienced good inflight Wi-Fi consider it more important than onboard entertainment when choosing an airline

Wi-Fi is a “life-saver” for families

Inflight connectivity is making life easier for parents: over half (66%) of the parents surveyed said access to the internet was a “life-saver” when it came to keeping children entertained during flights.

Parents travelling with children are also more likely on average to connect multiple devices, 71% connect more than one device when using inflight Wi-Fi to make sure the whole family is entertained and occupied for the duration of the flight. Whether used for browsing for holiday activities, streaming TV shows and movies or booking a last-minute taxi to meet them at their destination, onboard Wi-Fi is transforming family travel.

71%



of inflight connectivity users travelling with children connected more than one device

Flights no longer mean wasted time, especially for business travellers

The flexibility offered by connectivity allows passengers the freedom to multitask onboard, behaving as they would at home or in the office. Over half (55%) of all inflight connectivity users have connected more than one device to inflight Wi-Fi.

Communication and connectivity is even more important for business travellers, for both business and non-business reasons: 42% of inflight connectivity users on business flights use it to browse the internet, 38% visited social networks, 30% use email, 22% transfer files via email and 16% use corporate business tools.

61%



agree that “Wi-Fi would take the anxiety out of flying because I could stay in contact with people on the ground”, rising to 67% for those with children at home

Access to onboard Wi-Fi also gives business travellers flexibility during a flight. Instead of spending time downloading content onto devices in preparation for a flight, they can now conduct those activities while in the air. The survey found that 28% of all inflight connectivity users already stream short clips and 13% download large files like movies, a trend that is expected to increase as demand for Wi-Fi exceeds that of traditional inflight entertainment.

What this means for airlines

The new world of high-quality inflight connectivity brings unlimited customer service possibilities for airlines. Increased passenger satisfaction is an obvious benefit, but connectivity also provides major economic benefits. Airlines now have a unique opportunity to transform the cabin into a real-time content marketplace and capitalise on each passenger's time in the air, evolving the duty-free cart to a new world of onboard e-commerce.

The survey also revealed airlines that do not offer reliable Wi-Fi risk losing passengers, as nearly half (44%) said they would stop using their preferred airline within the next year if it did not offer high-quality connectivity. With airlines in every market racing to install or upgrade their broadband offering, passengers will have a choice to opt for an airline that offers high-quality broadband. The airlines that do not offer a seamless connectivity service will lose out.

Furthermore, inflight Wi-Fi can drive consumer loyalty. 48% of satisfied users agreed that its availability significantly improved their leisure flight experience, and 56% said it had a similar effect on their business flight. The majority of satisfied users (56%) would recommend their experience to a friend.

47% 

of business travellers agree: "I feel like I am wasting my time because I don't have Wi-Fi inflight"

44% 

of passengers would stop using their preferred airline in the next year if it offered poor quality inflight connectivity

77% 

of passengers claim they would pay for inflight connectivity even on short haul leisure flights, compared to 64% in 2016

Summary: High-quality inflight Wi-Fi is revolutionising passenger experience

With the number of passengers due to double from 3.8 billion to 7.2 billion by 2035 and huge demand for onboard Wi-Fi rising every year, bringing inflight connectivity to aircraft is not only a huge opportunity for airlines but a critical business decision.

The evolution of passenger attitudes towards onboard Wi-Fi means that where it was once seen as a novelty or luxury, it is now considered a necessity. And it can't just be any inflight Wi-Fi service. Passengers have shown they will only settle for seamless, reliable Wi-Fi which allows them to stream or browse online uninterrupted.

This year's survey overwhelmingly demonstrates that the availability of inflight connectivity is influencing choice of airline amongst passengers. Regardless of their reason for travel, passengers are demanding the same freedom in the skies as they are used to at home or in the office.

Appendix: Trends by region

This year's survey revealed a wealth of insights about how attitudes and approaches to inflight connectivity differ in different regions. From mature markets like the U.S. to emerging ones like Latin America, passengers around the world are making use of the newly connected aircraft in different ways.

But one thing remains clear – there is confirmed demand for seamless inflight coverage from every corner of the globe.

Asia Pacific

Inflight Wi-Fi is rapidly developing and highly in-demand in Asia Pacific – but with only a few airlines currently offering the service on its fleets, those that do can use this to their advantage. With more than half (52%) of Asia Pacific passengers stating that they would stop using their preferred airline in the next year if it offered poor quality Wi-Fi, reliable connectivity is crucial for future-proofing airlines in Asia Pacific.



Of the passengers surveyed in Asia Pacific:

- 91% are willing to pay for Wi-Fi on long haul leisure flights and 79% on short haul leisure flights, making passengers in Asia Pacific some of the most willing globally to pay for inflight Wi-Fi
- 48% of satisfied inflight connectivity users agreed that its availability significantly improved their leisure flight experience
- 67% agreed that inflight Wi-Fi is not a luxury but a necessity, ranking the highest globally and highlighting Asia Pacific consumer demand and reliance on connectivity
- 74% of long haul flyers agreed that Wi-Fi would take the anxiety out of flying as they could stay in contact with people on the ground

United States

The United States is an established inflight connectivity market, with a host of airlines already offering the service to their passengers, but the quality and speeds of the connectivity services to date has been poor. Now, U.S. passengers are looking for a high-quality, seamless service, and they're willing to pay the price: the vast majority (81%) of U.S. leisure travellers would pay for inflight connectivity on short-haul flights, jumping to 88% for long-haul flights.



Of the passengers surveyed in the U.S.:

- Almost half (46%) agree that "Wi-Fi in flight is not a luxury, it is a necessity", rising to 64% among those who have already used inflight connectivity

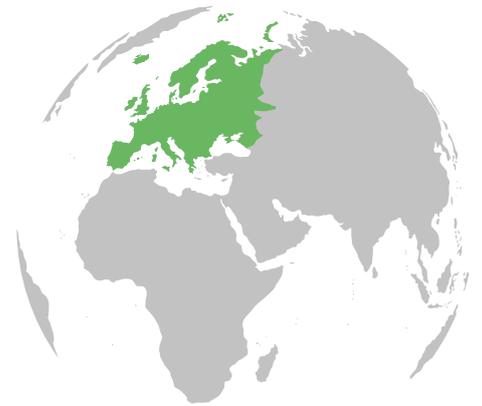
- Almost two-thirds (60%) of inflight connectivity users agreed that inflight Wi-Fi significantly improved their business flight experience, while almost half (44%) said it had a similar effect on their leisure flight
- Once connected, 31% browse the Internet; 32% visit social networks; and 18% stream videos
- 56% of U.S. passengers travel with their tablet, compared to 50% (Asia-Pacific), 48% (Europe), 37% (South America) and 39% (Middle East/Africa) meaning Americans are the most likely flyers worldwide to have a tablet device on board

Europe

For some time, Europe has lagged behind more established inflight broadband markets like the U.S. But with the launch of Inmarsat's GX Aviation on Lufthansa Group aircraft in May 2017, and the upcoming launch of the European Aviation Network, it's set to be a big year for European airspace.

Of the European passengers surveyed:

- Leisure flyers love the freedom to connect a variety of devices as they wish: 49% connect more than one device, and 65% of those travelling with children connect more than one device
- 40% of satisfied inflight connectivity users agreed that its availability significantly improved their leisure flight, rising to 49% on business flights
- 39% of European passengers who have experienced good quality inflight connectivity said they would stop using their preferred airline in the next year if the Wi-Fi quality was poor
- When connected, European inflight connectivity users spend over a third of their flight (36%) using inflight Wi-Fi, compared to the 11% they spend sleeping



Middle East

Middle Eastern carriers are embracing the connected aircraft, investing heavily in new technologies to ensure passengers have access to inflight broadband on their fleets. Two thirds of airlines in the Middle East are expected to operate connected aircraft by 2019, according to a report published ahead of the Connected Aircraft Conference in 2017. These airlines will be making the most of the economic opportunity at hand, with 81% of Middle Eastern passengers willing to pay for inflight connectivity even on short-haul leisure flights, rising to 85% for long-haul business flights.

Of the Middle Eastern passengers surveyed:

- 59% agree that inflight Wi-Fi takes the anxiety out of flying because they can stay in contact with people on the ground



- 36% will stop using their preferred airline within the next year if they only offer poor quality Wi-Fi
- Business flyers use Wi-Fi for both work and non-work reasons: 29% browse the web, 37% use social networks, 43% email and 20% use business tools
- Leisure flyers love the freedom to use their devices in the way they wish. The Middle East has the highest volume of multi-device usage in all regions surveyed, with 66% of inflight connectivity users connecting more than one device

Latin America

Latin America is an emerging market for inflight connectivity – most airlines don't currently offer it. But that is changing as Latin American airlines are beginning to see the possibilities offered by getting passengers online. Colombia's Avianca is the first Latin American airline to sign up, with Inmarsat's GX Aviation service which is expected to roll out later this year – and it is set to reap the rewards. Latin American inflight connectivity users consider onboard connectivity the second most important criteria when selecting an airline, ahead of both flight time and airline brand.



Of the Latin American passengers surveyed:

- Over half (54%) of inflight connectivity users now consider inflight Wi-Fi a necessity, not a luxury
- More than half (54%) of passengers who have experienced good inflight Wi-Fi consider it more important than onboard entertainment when choosing an airline
- The majority (58%) of parents agree that "Wi-Fi inflight would be a life saver when travelling with my children"
- Latin American business flyers use Wi-Fi for both work and non-work purposes: 44% browse the Internet; 42% use email; 40% visit social network sites; 19% transfer files via email; and 13% access corporate business tools

A note about the data: GfK has surveyed more than 9000 airline passengers across the globe. The survey covered all lengths of flight and is the largest known survey of its kind.

In February 2017, GfK conducted an online survey of more than 9000 passengers who had taken a flight in the past year and who had carried with them at least one personal device (smartphone, tablet or laptop) on a flight before. The survey was conducted in 18 markets: Brazil, Colombia, China, India, Indonesia, Malaysia, South Korea, Vietnam, France, Germany, Italy, Netherlands, Norway, Spain, Turkey, UK, Dubai and the USA.

High-quality Wi-Fi is defined as the ability to stream, browse and connect without interruption

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