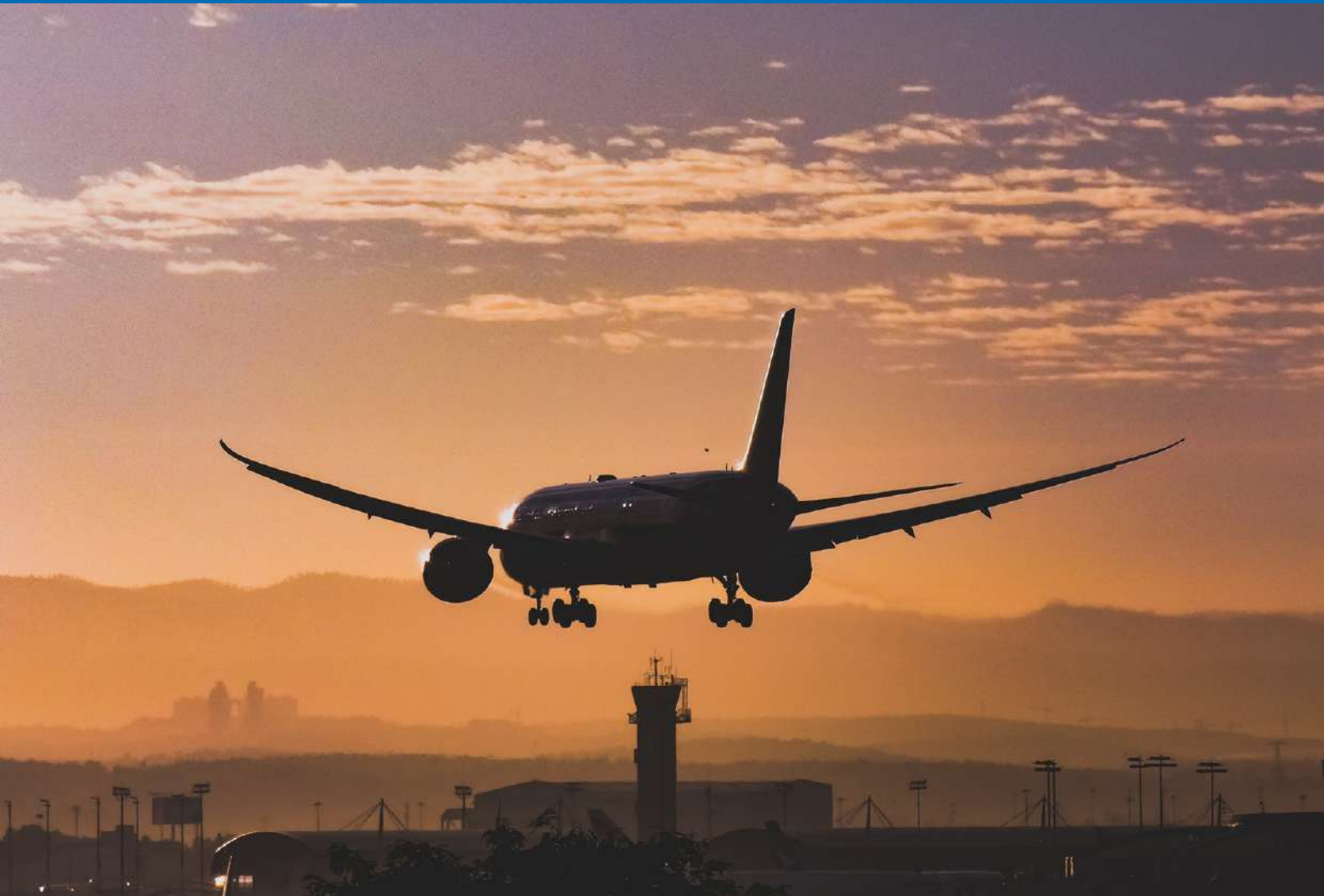




The Future of In-Flight Connectivity - 2020 Edition





Overview

The fourth edition of Valour Consultancy's 'Future of In-Flight Connectivity (IFC)' report represents a timely overview of the market amid a global pandemic that has already had a devastating impact on the aviation industry. At the time of writing, the vast majority of airlines and IFC vendors are downsizing to a state that meets the new normal and seeking financial aid from public and/or private sources in the hope of seeing out the downturn in demand, which is expected to last for years.

With the pandemic rightly being a focal point for anyone with a vested interest in the IFC market, this report will prioritise providing a point of view on all of the key questions linked to COVID-19. Those considered to be most important are shown below and a full scope of this study is illustrated on page 4.

Key Questions

- How will COVID-19 impact the current and future size of the IFC market in terms of installed base and revenue?
- How will IFC vendors, and those within the broader supply chain, react to COVID-19 and the inevitable downturn to come?
- Will COVID-19 accelerate M&A activity in the IFC market? How will the associated consolidation alter the business landscape?
- What and where are the growth opportunities as the industry begins to recover from the impact of COVID-19?
- Will there now be an increased focus around generating ancillary revenue/operational savings via IFC?
- Online habits on the ground have changed significantly as a result of COVID-19. What does this mean for the IFC market?
- When will airline investment into IFC return? Will we ever return to levels pre-pandemic?
- What will the airline industry look like post-COVID-19? Are there specific airline models/groups that will thrive?
- How will COVID-19 evolve the current IFC business model?
- Will new entrants emerge, and if so, what gap(s) in the market will they be looking to exploit?
- What is the current and future size of the market for key in-flight connectivity hardware (in terms of revenues, unit shipments and average selling prices)?
- Who are the leading suppliers of in-flight connectivity hardware? What is their market share?
- What is the market share of connectivity service providers, airlines and satellite operators?
- What are the major technological trends taking place?



Proposed Report Content

It is proposed that the report will be structured as follows:

Chapter 1 – Introduction, Scope and Methodology

Contains the report scope and explanations as to what is included and excluded from the research. All definitions used are presented in a clear and concise manner, alongside the exchange rates used in our analysis and the base year and forecast methodologies employed.

Chapter 2 – Technical Overview

Concentrates on the technical aspects of IFC and provides a comprehensive overview of the different types of solutions. This includes satellite coverage maps – for existing and planned satellites, developments in key enabling hardware and relevant standards and regulations.

Chapter 3 – Market Statistics and Trends

Quantifies the number of aircraft equipped with in-flight Wi-Fi and/or cellular connectivity out to 2029, supported by a write-up of the factors likely to influence future take up of these technologies. Data is segmented by geographic region, aircraft size, connectivity technology and type of fitment. Statistics also show the cost of providing IFC, cost savings from various e-Enablement applications and service revenues from offering connectivity to passengers. The market for key IFC hardware components is also quantitatively assessed.

Chapter 4 – Competitive Environment

Looks at the competitive environment of those operating across the entire IFC value chain. Notable mergers and acquisitions are discussed alongside new product developments, key partnerships, business models and strategies as well as a presentation of market shares of equipment manufacturers, service providers, airlines and satellite operators.





Proposed Scope

The diagram below offers a visual summary of the quantitative analysis to be included in this report. 10 year forecasts will be provided for all segmentations from 2020 until 2029.

Connected Aircraft
Active Installed Base, Annual Installations & Penetration Rate
The Global Installed Base is Segmented into Major Geographic Regions:

- Africa
- Asia Pacific (exc China)
- Central & South America
- China
- Europe
- Middle East
- North America



<p>PRODUCT TYPE</p> <ul style="list-style-type: none"> Cellular Only Wi-Fi Only Cellular & Wi-Fi 	<p>CONNECTIVITY TYPE</p> <ul style="list-style-type: none"> Air-To-Ground L-Band Satellite Ku-Band Satellite Ka-Band Satellite Hybrid 	<p>AIRCRAFT SIZE</p> <ul style="list-style-type: none"> Narrow-body Wide-body Regional Jets 	<p>FITMENT TYPE</p> <ul style="list-style-type: none"> Retrofit Linefit <p>NET & Gross Installations</p>	<p>HARDWARE MARKET</p> <ul style="list-style-type: none"> Antennas Pico Cells Server Units Modems Wireless Access Points <p>Revenue, Unit Shipments and Average Selling Prices</p>
--	---	---	---	--

IFC BUSINESS CASE

- Cost of IFC
- Savings Associated With IFC
- Ancillary Revenues

MARKET SHARES (2019)

- Airlines
- Service Providers
- Hardware Vendors
- Satellite Operators





About Valour Consultancy

Valour Consultancy is a UK-based provider of market intelligence services. Founded in 2012, the company has grown rapidly and is renowned for its comprehensive and high-quality research and consultancy services. Having firmly established itself in the aviation space, where many companies rely on its expert insight and analysis, Valour Consultancy has successfully expanded into a number of other markets including, maritime, industrial, drones, police and enterprise body-worn cameras, consumer electronics and more.

The company continues to operate in accordance with the three core values it was founded on – Honesty, Trust and Time. Doing so has enabled Valour Consultancy to deliver detailed and meaningful insight and establish long-lasting relationships in the process. Have a look at our testimonials page to discover what our clients have to say about working with us.

What we offer

- Syndicated research reports
- Custom research and consulting
- Whitepapers
- Survey design and analysis
- Databases and tracker products
- Market briefings
- Public speaking, panel discussions and webinars

Why Choose Valour Consultancy?

- ✓ 40 years combined experience
- ✓ Transparent methodology
- ✓ Ability to influence report content
- ✓ Unrivalled detail and accuracy
- ✓ Constant access to our consultants



Participant Programme

We invite you to enrol in our “participant programme” which ensures targeted, actionable insight by allowing clients to:

- **Modify the report scope** to meet specific market research requirements
- Benefit from having **advanced access** to market estimates and forecast data
- Take advantage of a **15% discount** on the report price (see table below)
- Receive a **presentation of the report findings** by one of our analysts

LICENSE	CURRENCY	PARTICIPANT PRICE (EXC. VAT)		NON-PARTICIPANT PRICE (EXC. VAT)	
Single User (only the licensed individual can use the report)	GBP	£3,300	✓	£3,882	✓
Single-Site (anyone at a specific company location can use the report)	GBP	£3,960	✓	£4,659	✓
Multi-Site (any company employee in any location can use the report)	GBP	£4,554	✓	£5,358	✓

NAME:
POSITION:
COMPANY:
ADDRESS:

TEL:
EMAIL:

PAYMENT TO BE MADE VIA BANK TRANSFER TO:

Valour Consultancy Ltd, Barclays Bank Plc,
 6-17 Tottenham Court Road, London W1T 1BE

IBAN: GB65 BARC 2010 5393 4676 86
 SWIFT CODE: BARCGB22