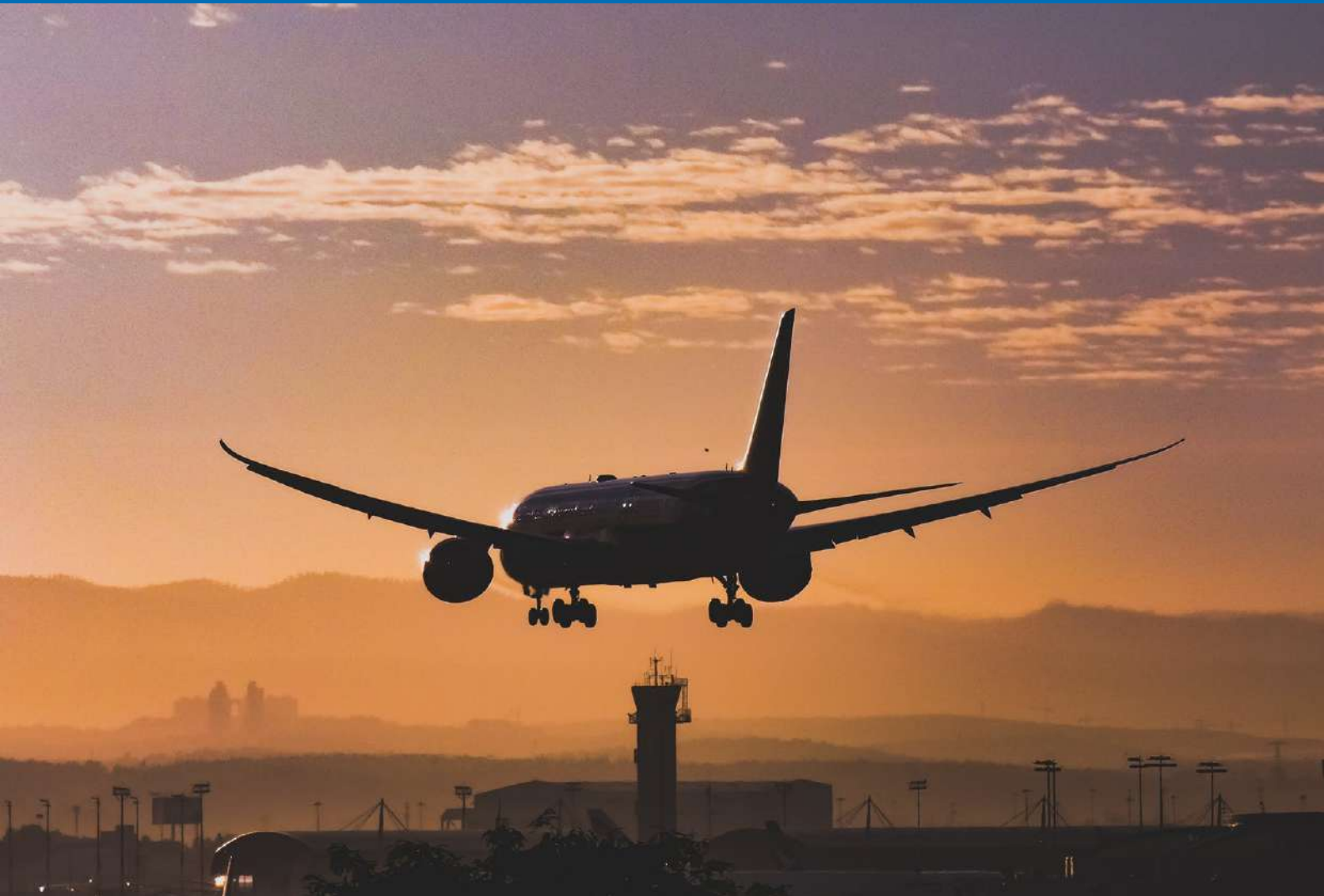




The Future of In-Flight Connectivity - 2020 Edition





The Future of In-Flight Connectivity - 2020 Edition

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. With COVID-19 rightly being a focal point for anyone with a vested interest in the IFC market, this report prioritises providing a point of view on how the competitive environment and business model will evolve and where growth opportunities lie.

Overview

By now, readers will be acutely aware of what COVID-19 is, its origins and how it has wreaked havoc in all corners of the globe.

The aviation sector is projected to be amongst the worst affected by COVID-19, highly exposed by its fundamental dependence on the movement of people, which has ceased through the introduction of various political regulation.

It goes without saying that as a subset of the broader aviation sector, the market for IFC is just as vulnerable to the economic impact of COVID-19.

Following a period of sustained growth, those working within the aviation industry and IFC value chain now face one of the worst

downturns in living memory, which has, unfortunately, already led to the loss of valuable experience in the workforce, aircraft retirements, deferral of new satellite launches and massive airline debt that threatens investment in new technology in the years to come.

If looking for a silver lining, airline decision makers remain mostly unmoved in terms of the positive sentiment shown toward IFC in recognition of the fact connectivity will play a huge role in the recovery phase of this pandemic.

Similarly, COVID-19 looks to have sparked overdue M&A activity and collaboration that will allow what is left of the supply chain to better meet the needs of airlines and passengers going forward.

Valour Consultancy's aim in writing this report is to provide companies interested in the IFC market with an in-depth and timely review of its present status and likely future development in the aftermath of the COVID-19 pandemic.

This report provides an unparalleled insight into current adoption of IFC on commercial aircraft and how it is likely to change as we navigate through the "new normal".

Drivers and inhibitors of market growth are explored in great detail, alongside commentary on technology trends and the competitive environment. Market estimates and forecasts are also provided in Excel format for internal analysis.



Report 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>
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IFC BUSINESS CASE

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

MARKET SHARES (2019)

- Airlines
- Service Providers
- Hardware Vendors
- Satellite Operators





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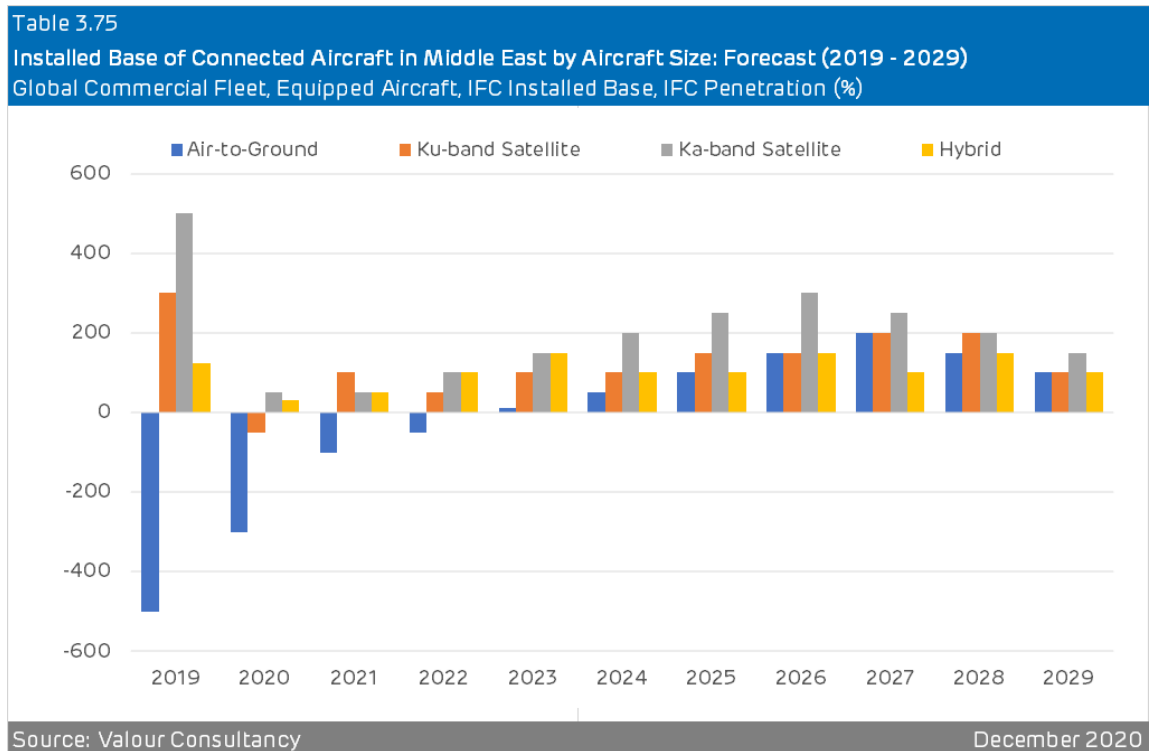
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Sample Tables

Table 3.1
Global Installed Base of Connected Aircraft by Aircraft Size: Forecast (2019 - 2029)
Global Commercial Fleet, IFC Installed Base, IFC Penetration (%), Flying

	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	CAGR (19 - 29)
World Commercial Fleet												
Commercial Aircraft With IFC												
IFC Penetration												
Commercial Aircraft With IFC and Flying												
World Commercial Narrowbody Fleet												
Commercial Narrowbody Aircraft With IFC												
IFC Penetration												
Commercial Narrowbody Aircraft With IFC and Flying												
World Commercial Widebody Fleet												
Commercial Widebody Aircraft With IFC												
IFC Penetration												
Commercial Widebody Aircraft With IFC and Flying												
World Commercial Regional Jet Fleet												
Commercial Regional Jets With IFC												
IFC Penetration												
Commercial Regional Jets With IFC and Flying												

Source: Valour Consultancy December 2020





Overview

Valour Consultancy conducted more than **30 interviews** with a variety of companies involved in the commercial aviation market. This includes:

- Aircraft OEMs
- Connectivity service providers
- IFEC equipment manufacturers
- Satellite operators
- Fleet operators

Coverage

Accurate data on the current market size for IFC

Forecasts out to 2029 with robust justifications including the impact of the COVID-19 pandemic

Focus on annual installations, installed aircraft and associated revenues (hardware and services)

Thorough explanation of key drivers and inhibitors of market growth

Discussion of transformative technology trends at play, including the emergence of flat panel antennas and NGSO satellites

Market shares and detailed profiles of 24 companies active in the market

Analysis of different business models and positioning strategies



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About Valour Consultancy

Valour Consultancy is an award-winning provider of market intelligence services. Headquartered in the UK and with offices in Melbourne, Australia, the company has grown rapidly since its founding in 2012. Valour is renowned for its comprehensive and high-quality research and consultancy services and many of the world's best known companies rely on its expert insight and analysis. Coverage areas span commercial and business aviation, airports, maritime, the Internet of Things, 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 the testimonials area of our website to discover what our clients have to say about working with us.

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- Whitepapers
- Survey design and analysis
- Databases and tracker products
- Market briefings
- Public speaking, panel discussions and webinars

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