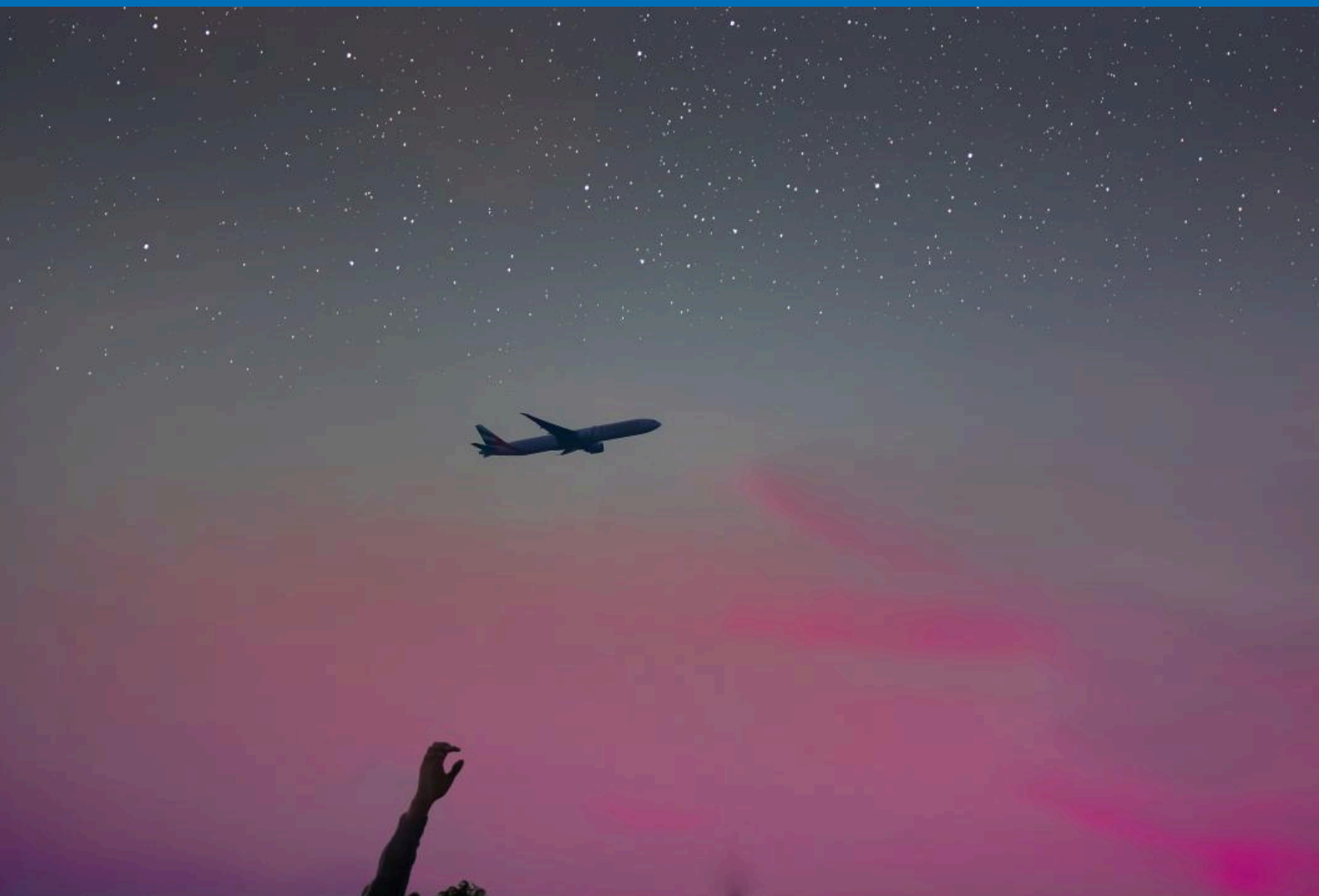




The Future of In-Flight Entertainment - 2021 Edition





The Future of In-Flight Entertainment - 2021

In 2017, Valour Consultancy published "*The Future of In-Flight Entertainment*", which was well received across the industry. This report has built on the previous iteration and provides a vital update on a market which has been heavily impacted by the COVID-19 pandemic.

Alongside a lengthy discussion of how the industry will change and adapt over the coming years, the report quantifies IFE system shipments, installed base and revenue between 2020 and 2030.

Overview

While virtually every sector has been hit hard by the pandemic, the travel restrictions which were brought in to suppress the spread of the virus have meant the aviation industry has felt the impact particularly hard, with ICAO stating that just 1.8 billion passengers flew in 2020, down from 4.5 billion in 2019. The financial difficulties facing airlines has clearly impacted the IFE market, and will continue to do so for some time to come.

However, as multiple vaccines are rolled out across the globe, the prospect of a return to normal life appears on the horizon in 2021. If the global effort to suppress the virus is successful, masses of people will be excited to get travelling again. As the aviation sector begins to recover, IFE looks set to play a significant part as the

service takes on an increasingly vital role in the aircraft.

IFE has begun expanding far beyond traditional entertainment into a holistic platform that can play a pivotal role in the whole cabin experience. The pandemic has accelerated the need for aircraft digitalisation, as airlines look to adapt the cabin to the challenges of air travel in the post-COVID era. The need for digital platforms on aircraft has never been greater.

The IFE and IFC markets have long been intertwined with each other; sometimes running parallel, and sometimes perfectly in-sync. As IFC becomes more cost effective and connectivity providers are able to offer greatly increased capacity for passengers, the likelihood of offline IFE being selected by airlines

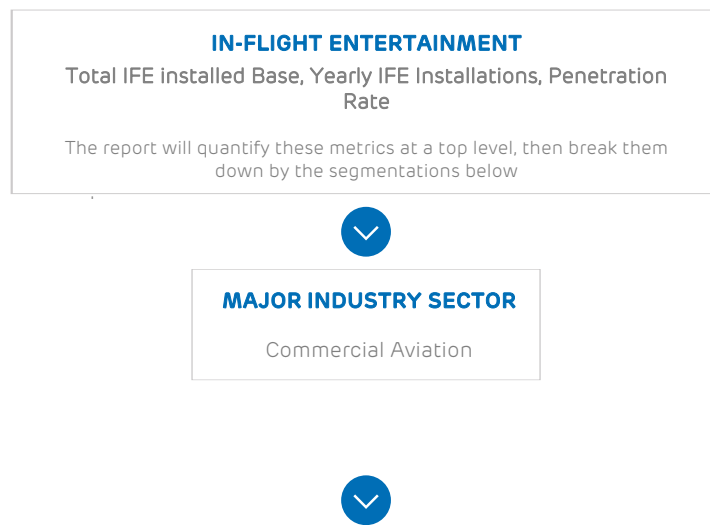
becomes less and less likely. The two markets are converging with one another and by the end of the decade the notion of having one without the other may seem like a thing of the past.

This report provides companies interested in the IFE market with detailed information on its present status and likely future development in the aftermath of COVID-19. Key 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. Data is provided for all segmentations from 2019 until 2030.



Market Segmentations

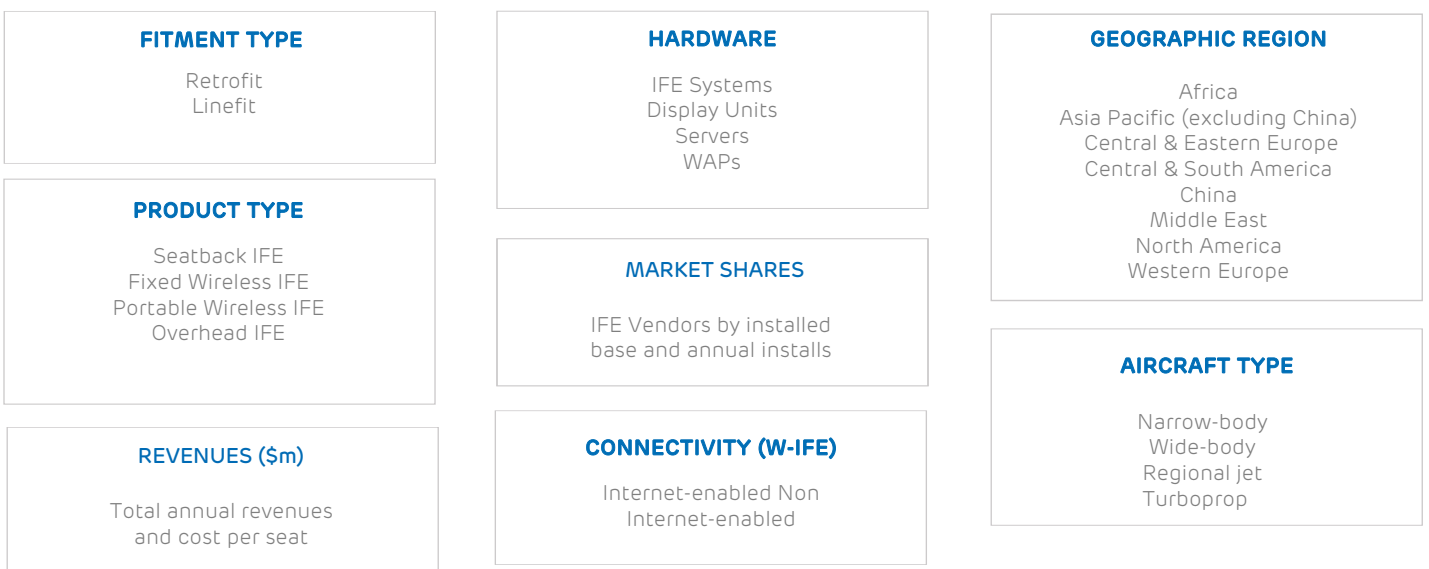




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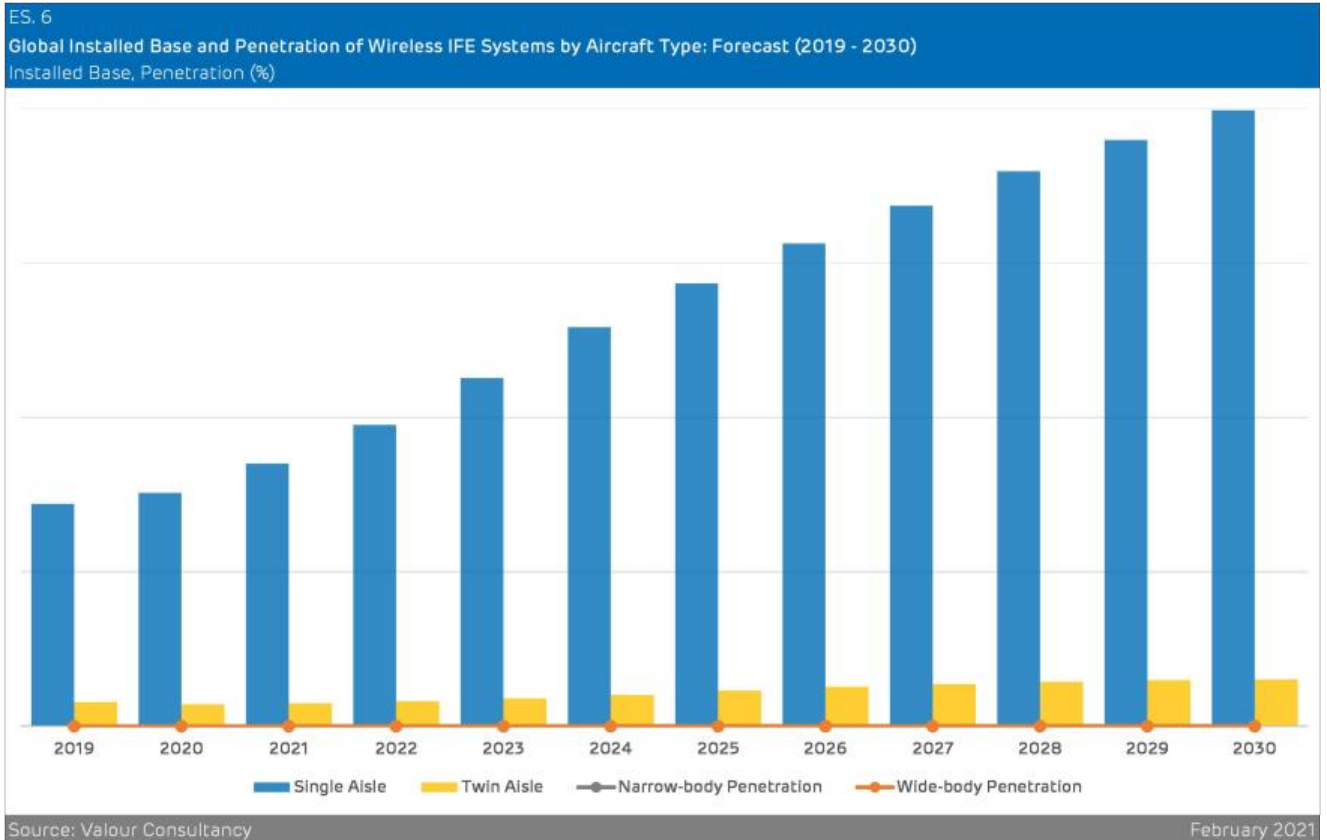
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 Installed Base at Year End, Penetration (%)

	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029	2030	CAGR (20 - 30)
Africa	10	20	30	40	50	60	70	80	90	100	110	120	10.0%
% of Total Aircraft in Region	10.0%	15.0%	20.0%	25.0%	30.0%	35.0%	40.0%	45.0%	50.0%	55.0%	60.0%	65.0%	
Central & Eastern Europe	10	20	30	40	50	60	70	80	90	100	110	120	10.0%
% of Total Aircraft in Region	10.0%	15.0%	20.0%	25.0%	30.0%	35.0%	40.0%	45.0%	50.0%	55.0%	60.0%	65.0%	
Western Europe	10	20	30	40	50	60	70	80	90	100	110	120	10.0%
% of Total Aircraft in Region	10.0%	15.0%	20.0%	25.0%	30.0%	35.0%	40.0%	45.0%	50.0%	55.0%	60.0%	65.0%	
Middle East	10	20	30	40	50	60	70	80	90	100	110	120	10.0%
% of Total Aircraft in Region	10.0%	15.0%	20.0%	25.0%	30.0%	35.0%	40.0%	45.0%	50.0%	55.0%	60.0%	65.0%	
Central & South America	10	20	30	40	50	60	70	80	90	100	110	120	10.0%
% of Total Aircraft in Region	10.0%	15.0%	20.0%	25.0%	30.0%	35.0%	40.0%	45.0%	50.0%	55.0%	60.0%	65.0%	
North America	10	20	30	40	50	60	70	80	90	100	110	120	10.0%
% of Total Aircraft in Region	10.0%	15.0%	20.0%	25.0%	30.0%	35.0%	40.0%	45.0%	50.0%	55.0%	60.0%	65.0%	
Asia-Pacific (exc. China)	10	20	30	40	50	60	70	80	90	100	110	120	10.0%
% of Total Aircraft in Region	10.0%	15.0%	20.0%	25.0%	30.0%	35.0%	40.0%	45.0%	50.0%	55.0%	60.0%	65.0%	
China	10	20	30	40	50	60	70	80	90	100	110	120	10.0%
% of Total Aircraft in Region	10.0%	15.0%	20.0%	25.0%	30.0%	35.0%	40.0%	45.0%	50.0%	55.0%	60.0%	65.0%	
Total	1,000	1,100	1,200	1,300	1,400	1,500	1,600	1,700	1,800	1,900	2,000	2,100	10.0%
% of Global Addressable Fleet	10.0%	15.0%	20.0%	25.0%	30.0%	35.0%	40.0%	45.0%	50.0%	55.0%	60.0%	65.0%	

Source: Valour Consultancy February 2021





Overview

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

- IFE system vendors
- Hardware manufacturers
- Content service providers
- IFC providers
- W-IFE service providers
- Aircraft OEMs
- Airlines
- MROs

Coverage

Accurate data on the current market size for IFE systems

Forecasts out to 2030 with robust justifications including the impact of the COVID-19 pandemic

Focus on annual installations, installed aircraft, market penetration and associated revenues

Thorough explanation of key drivers and inhibitors of market growth

Discussion of the technology trends which will shape IFE products in the coming years

Market shares and detailed profiles of companies active in the market



Order Form

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Valour Consultancy is an award-winning provider of market intelligence services. Headquartered in the UK and with an office 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.

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