



# The Market for Connected Digital Applications - 2021 Edition





## Overview

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The cockpit and cabin applications market is arguably still in its infancy, but has been quickly evolving alongside IFC. This growth has been amplified by COVID-19, with airlines now tasked with delivering a touchless cabin and pressured to generate ancillary revenues.

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

## Key Questions

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- Has COVID-19 accelerated the need for real-time connected applications? And if so, how?
- What are the most popular connected applications today and are there any major updates planned in the near future?
- What type of connected applications represent the low hanging fruit, in terms of return on investment, for airlines and why?
- Who are the leading developers of connected cockpit and cabin applications?
- Which connectivity service providers and airlines are these developers working with?
- What new applications, if any, are most likely to emerge in the coming years?
- How will app stores develop and how will the role of service providers evolve?
- How many users are currently subscribed to connected digital applications, and how will this change over the next 10 years?
- Will COVID-19 accelerate M&A activity in the this market? How will the associated consolidation alter the business landscape?
- How will LEO constellations impact the connected digital applications market?
- How will the consumer market impact the connected digital applications market?
- How will the pandemic impact airline investment into the connected digital applications market over the coming years?
- What does the connected digital applications value chain look like?
- How much is the connected cockpit and cabin applications market worth and what are the market shares of those active?
- What are the different business models in use?
- What are the key drivers and inhibitors of market growth?



# 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 2021 until 2030 with historic data from 2020 also included.

**CONNECTED DIGITAL APPLICATIONS**  
 Total Connected Digital Application Subscribers, Annual New Subscribers, Revenues, Average Selling Price (ASP)  
 The report will quantify these metrics at a top level, then break them down by the segmentations below



# Market Segmentations

**APPLICATION TYPE**

- Cabin Reporting
- Document Folder
- Electronic Flight Folder
- Maintenance
- Performance Optimisation
- Point-of-Sale
- Safety
- Telemedicine
- Weather & Navigation

**CONNECTIVITY TYPE**

- Surface Data Communications
- HF/VHF radio
- Legacy Inmarsat Services
- Legacy Iridium Services
- SwiftBroadband Safety
- Iridium Certus
- Passenger In-Flight Connectivity

**GEOGRAPHIC REGION**

- Africa
- Asia Pacific
- Central & South America
- Europe
- Middle East
- North America

**MARKET SHARES**

- App Developers
- Connectivity Service Providers

**DEVICE TYPE**

- Smartphone
- Tablet
- (broken out by iOS, Android, Windows and other)

**AIRLINE TYPE**

- Full Service
- LCC
- Regional



# Proposed Report Content

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It is proposed that the report will be organised into the following chapters:

## 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 connected cabin and cockpit applications and provides a comprehensive overview of the different types of solutions and their different use cases.

## Chapter 3 – Market Statistics and Trends

Quantifies the number of digital application subscribers and associated revenue out to 2030, supported by a write-up of key factors likely to influence future adoption. Data is segmented by Application Type, Device Type, Geographic Region, Airline Type, and Connectivity Type.

## Chapter 4 – Competitive Environment

A detailed write-up of the competitive environment, with informative company profiles on key stakeholders in the market. Notable mergers and acquisitions are discussed alongside new product developments, key partnerships, business models and strategies.

## Appendix

Indexes app developers and integrators globally.





## 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

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