



The Market for IFEC and CMS Systems on VVIP & Business Aircraft - 2022 Edition





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Valour Consultancy's report on the market for in-flight connectivity, in-flight entertainment and cabin management systems on business aircraft is the premier source of information on this quickly growing category. Now in its third edition, the report's scope has been expanded to provide a granular view of forthcoming NGSO solutions and their likely impact in different regions and different segments.

With 193 pages of commentary on key trends and more than 250 data tables containing market estimates and forecasts, it is the only report of its kind, and our most comprehensive analysis to date.

Overview

Business aviation has been one of the first industries to recover from the COVID-19 crisis, benefiting hugely from airline capacity reductions and people looking less favourably on travelling through crowded airports and in cramped commercial aircraft cabins.

Furthermore, the number of ultra-high-net-worth individuals has grown substantially over the course of the last few years with insatiable demand for aircraft causing pre-owned inventory levels to fall to historic lows during 2022.

As such, many fractional providers have seen record enquiries from new customers, traffic in certain parts of the world is exceeding pre-pandemic levels and major OEMs are reporting healthy order backlogs.

So, rather than an ongoing inhibitor, COVID-19 has acted as a catalyst of recovery and by extension, increased use of IFEC on business aircraft. This report, therefore, provides companies interested in the market with an in-depth review of its present status and likely development in the aftermath of the pandemic.

With new LEO solutions from the likes of SpaceX and OneWeb on the horizon, a key focus on this update is the addition of a new split in the data showing how the number of aircraft with satellite-based IFC breaks down between NGSO and GSO constellations.

We've also made forecasts more granular with the reader able to see how adoption of different IFEC technologies will grow in each

aircraft segment for the six regions under analysis.

Data is supported by in-depth commentary on market issues, tech trends and the competitive environment. An overview of the IFEC ecosystem and detailed profiles of key players in the market is additionally provided.

Quantitative and qualitative insight and analysis has been drawn from >40 interviews with key players in the value chain – many of which are established partners who rely on our research on IFEC and cabin technology in the commercial aviation market. This includes aircraft OEMs, aircraft owners/operators, MROs, IFEC vendors, service providers, equipment manufacturers and satellite operators.



Report Scope

The diagram below offers a visual summary of the quantitative analysis included in this report. Ten year forecasts are provided for all segmentations from 2022 until 2031 with historic data from 2021, the base year, also included.

KEY METRICS

Installed Base | Annual Installations | Total Addressable Market | Penetration
| Annual Hardware Revenues | Annual Service Revenues | Average Selling Prices (ASPs) | Average Revenue per Aircraft (ARPA)

These metrics are shown at both a global and regional level then broken down by the segmentations below.

Geographic Region

Africa

Asia-Pacific

Central & South America

Europe

Middle East

North America

Market Segmentations

CONNECTIVITY TYPE

- ATG
- L-band
- Ku-band
- Ka-band
- Hybrid

SATELLITE ORBIT TYPE

- NGSO
- GSO

FITMENT TYPE

- Line Fitment
- Retrofit

MARKET SHARES

- Network Operators
- Service Providers
- IFE/CMS Vendors

FREQUENCY BAND

- Narrowband
- Broadband

AIRCRAFT TYPE

- Bizliner
- Large Cabin Biz Jet
- Super Midsize Biz Jet
- Midsize Biz Jet
- Small Cabin Biz Jet
- Very Light Biz Jet
- Turboprop



Table of Contents

Executive Summary

Chapter 1 - Introduction, Scope and Methodology

- 1.1 Introduction
- 1.2 Scope
 - 1.2.1 Fitment Type Definitions
 - 1.2.2 Aircraft Type Definitions
 - 1.2.2.1 Bizliners
 - 1.2.2.2 Large Cabin Jets
 - 1.2.2.3 Super Midsize Business Jets
 - 1.2.2.4 Midsize Business Jets
 - 1.2.2.5 Small Cabin Business Jets
 - 1.2.2.6 Very Light Business Jets
 - 1.2.2.7 Turboprops
 - 1.2.2.8 Aircraft Exclusions
 - 1.2.3 Frequency Band Definitions
 - 1.2.3.1 ATG Communications
 - 1.2.4 Satellite Orbit Definitions
 - 1.2.5 Geographic Region Definitions
 - 1.2.5.1 Areas of Ambiguity
 - 1.2.6 Product Type Definitions
 - 1.2.6.1 In-Flight Connectivity
 - 1.2.6.2 In-Flight Entertainment
 - 1.2.6.3 Cabin Management Systems
 - 1.2.7 Point of Measurement of Statistics
- 1.3 Report Content
- 1.4 Data Collection Methods and Sources
- 1.5 Exchange Rates

Chapter 2 - Technology Review

- 2.1 Introduction
- 2.2 Connectivity Technologies
 - 2.2.1 Air-to-Ground
 - 2.2.1.1 Gogo ATG
 - 2.2.1.2 SmartSky Networks ATG
 - 2.2.1.3 Other ATG Networks
 - 2.2.2 Satellite Communications
 - 2.2.2.1 L-band
 - 2.2.2.2 S-band
 - 2.2.2.3 Ku-band
 - 2.2.2.4 Ka-band
 - 2.2.2.5 Next Generation Satellite Systems
 - 2.2.2.6 Summary of Notable Future Launches
 - 2.2.2.7 ATG and Satellite Coverage Maps
- 2.3 Developments in Enabling Hardware
 - 2.3.1 Antennas
 - 2.3.1.1 Mechanically Steered Antennas
 - 2.3.1.2 Electronically Steered Phased Arrays
 - 2.3.1.3 Fuselage vs Tail Mount Antennas
 - 2.3.2 Modems
 - 2.3.3 Servers
 - 2.3.4 WAPs
 - 2.3.4.1 802.11ac (Wi-Fi 5)
 - 2.3.4.2 802.11ax (Wi-Fi 6 and Wi-Fi 6E)
 - 2.3.4.3 802.11be (Wi-Fi 7)
 - 2.3.4.4 Li-Fi
 - 2.3.5 Displays
 - 2.3.5.1 Ultra-HD Screens
 - 2.3.6 Audio
 - 2.3.6.1 Bluetooth
 - 2.3.7 Cabling
- 2.4 Content Trends
 - 2.4.1 Early Window Content
 - 2.4.2 Moving Map

- 2.5 Cellular Technology
 - 2.5.1 Second Generation (2G)
 - 2.5.1.1 GSM, GPRS, EDGE
 - 2.5.2 Third Generation (3G)
 - 2.5.2.1 W-CDMA, HSDPA, HSUPA, HSPA/+
 - 2.5.2.2 EV-DO
 - 2.5.2.3 2G and 3G Sunset Plans by Country
 - 2.5.3 Fourth Generation (4G)
 - 2.5.3.1 LTE and LTE Advanced
 - 2.5.4 Fifth Generation (5G)
 - 2.5.4.1 5G NR
 - 2.5.4.2 5G-Advanced
- 2.6 In-Seat Power
- 2.6.1 Inductive Charging
- 2.6.2 Design Trends
- 2.7 AI-Driven Personalisation
- 2.8 Control Mechanisms
 - 2.8.1 Voice Control
 - 2.8.2 Gesture Control and Eye Tracking
 - 2.8.3 Holographic Controllers

Chapter 3 - Market Statistics & Trends

- 3.1 Introduction
 - 3.1.1 Market Drivers
 - 3.1.1.1 Growth in Number of UHNWIs
 - 3.1.1.2 Aircraft Production
 - 3.1.1.3 Low Pre-Owned Inventory Levels
 - 3.1.1.4 COVID-19 Outbreak as a Driver
 - 3.1.1.5 Obsolete Hardware and Frustration with Older Systems
 - 3.1.1.6 Growth of the Charter Business Model
 - 3.1.1.7 Proliferation of High-Speed IFC in Commercial Aviation
 - 3.1.1.8 FANS 1/A and ADS-B Mandates
 - 3.1.1.9 Increasing Competition
 - 3.1.1.10 Development of New Business Models
 - 3.1.1.11 Falling Costs
 - 3.1.1.12 Emergence of New Antenna Technology to Expand the Addressable Market
 - 3.1.1.13 Demand for Dual IFC Systems
 - 3.1.1.14 Different Usage Profiles
 - 3.1.1.15 Merging of IFC and IFE
 - 3.1.1.16 Internet of Aircraft Things
 - 3.1.1.17 Expanding Airport Infrastructure
 - 3.1.2 Market Inhibitors
 - 3.1.2.1 2022/2023 Economic Downturn
 - 3.1.2.2 Susceptibility to Geopolitical Issues
 - 3.1.2.3 Environmental Concerns
 - 3.1.2.4 Age of Fleet
 - 3.1.2.5 Cybersecurity Fears
 - 3.1.2.6 Lack of Interoperability
 - 3.1.2.7 Absence of Truly Global High-Speed IFC
 - 3.1.2.8 Difficulty Providing High Speed Connectivity on Smaller Airframes
 - 3.1.2.9 Cost, Complexity and Confusion
 - 3.1.2.10 Delays to Launch of New Networks
 - 3.1.2.11 Problems with Satellites and Lack of Redundancy
 - 3.1.2.12 Decline of Broadcast TV
 - 3.1.2.13 Growth of Urban Air Mobility
 - 3.1.2.14 ADS-B Mandates as an Inhibitor
- 3.2 Market Estimates and Forecasts
 - 3.2.1 In-Flight Connectivity Market
 - 3.2.1.1 Top-Level View
 - 3.2.1.2 Broadband versus Narrowband
 - 3.2.1.3 By Frequency Band
 - 3.2.1.4 GSO versus NGSO
 - 3.2.1.5 By Aircraft Type
 - 3.2.1.6 By Geographic Region
 - 3.2.1.7 Service Revenues
 - 3.2.1.8 Hardware Market
 - 3.2.2 IFE/CMS Systems Market
 - 3.2.2.1 Top-Level
 - 3.2.2.2 By Fitment Type
 - 3.2.2.3 By Aircraft Type
 - 3.2.2.4 By Geographic Region
 - 3.2.3 Selection of Tables and Charts

Chapter 4 - Competitive Environment

- 4.1 Market Shares
 - 4.1.1 In-Flight Connectivity Market
 - 4.1.1.1 Service Providers
 - 4.1.1.2 Network Operators
 - 4.1.2 IFE/CMS Systems Market
- 4.2 Selected Company Profiles
 - 4.2.1 Aircraft OEMs
 - 4.2.1.1 Airbus Group SE
 - 4.2.1.2 AVIC
 - 4.2.1.3 The Boeing Company
 - 4.2.1.4 Bombardier, Inc.
 - 4.2.1.5 Cirrus Aircraft
 - 4.2.1.6 COMAC
 - 4.2.1.7 Dassault Aviation SA
 - 4.2.1.8 Embraer S.A.
 - 4.2.1.9 Gulfstream Aerospace Corporation
 - 4.2.1.10 Honda Aircraft Company
 - 4.2.1.11 Pilatus Aircraft Ltd.
 - 4.2.1.12 Textron Aviation, Inc.
 - 4.2.1.13 Others
 - 4.2.2 IFE/CMS/IFC Vendors
 - 4.2.2.1 ALTO Aviation
 - 4.2.2.2 ArgonFDS
 - 4.2.2.3 Astronics Corporation
 - 4.2.2.4 Collins Aerospace
 - 4.2.2.5 Gogo Business Aviation, LLC.
 - 4.2.2.6 Heads Up Technologies, Inc.
 - 4.2.2.7 Honeywell Aerospace
 - 4.2.2.8 IDAIR GmbH
 - 4.2.2.9 Lufthansa Technik AG
 - 4.2.2.10 Rosen Aviation, LLC
 - 4.2.2.11 Satcom Direct, Inc.
 - 4.2.2.12 Others
 - 4.2.3 Network Operators
 - 4.2.3.1 Inmarsat Group Holdings Ltd.
 - 4.2.3.2 Intelsat S.A.
 - 4.2.3.3 Iridium Communications, Inc.
 - 4.2.3.4 OneWeb Holdings Ltd.
 - 4.2.3.5 SES S.A.
 - 4.2.3.6 SmartSky Networks, LLC
 - 4.2.3.7 SpaceX
 - 4.2.3.8 Telesat Corporation
 - 4.2.3.9 Viasat, Inc.
 - 4.2.4 Others
 - 4.2.5 Notable MROs & Completion Centres
 - 4.2.6 Notable Fleet Operators

- Appendix A - 2G/3G Sunset Plans
- Appendix B – List of Tables and Charts
- Appendix C - Abbreviations & Acronyms

Sample Tables

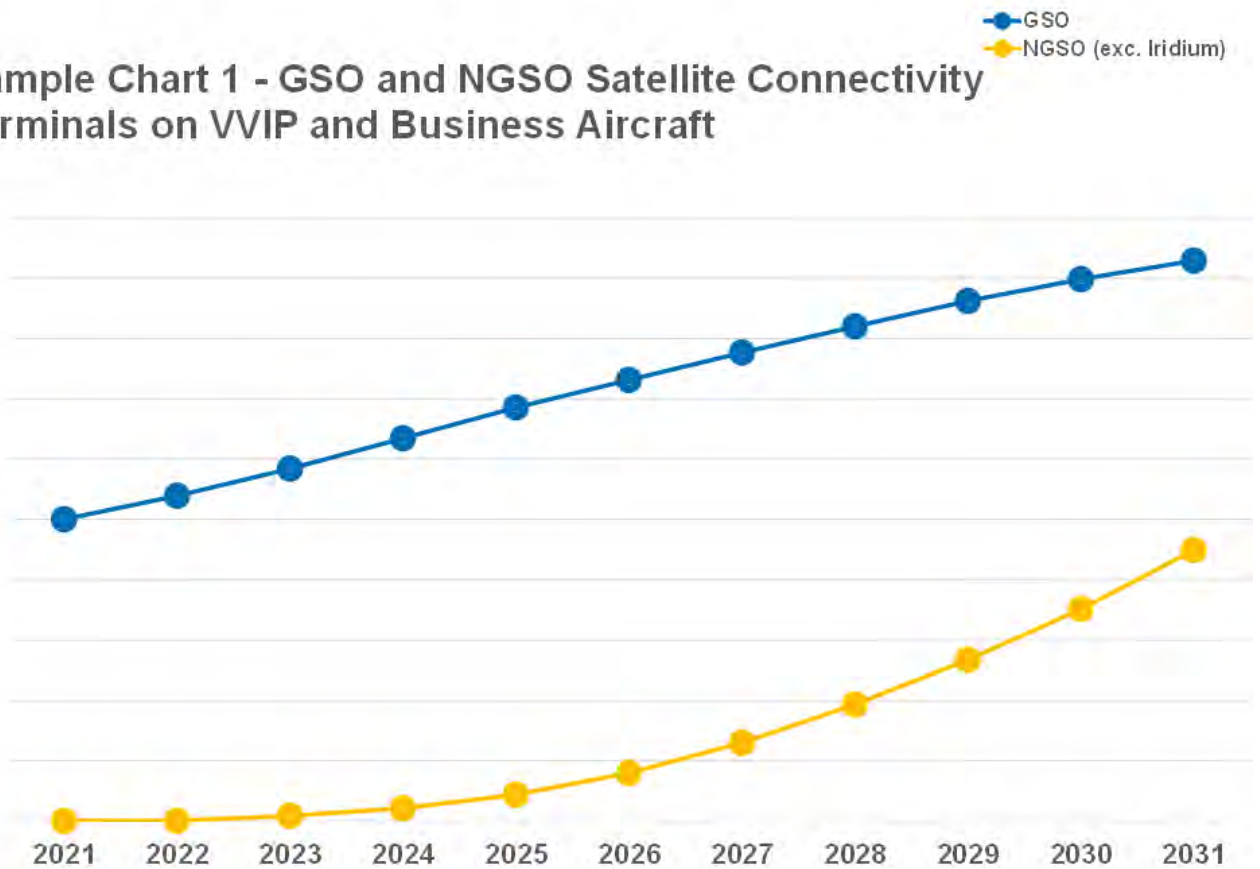
Sample Table 1
Global Active In-Flight Connectivity Terminals on Business Aircraft by Frequency Band (2021 - 2031)

| Active Terminals | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | CAGR (21 - 31) |
|----------------------------|------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|----------------|
| ATG | 100 | 200 | 300 | 400 | 500 | 600 | 700 | 800 | 900 | 1,000 | 1,100 | 27.1% |
| L-band | 100 | 200 | 300 | 400 | 500 | 600 | 700 | 800 | 900 | 1,000 | 1,100 | 27.1% |
| Ku-band | 100 | 200 | 300 | 400 | 500 | 600 | 700 | 800 | 900 | 1,000 | 1,100 | 27.1% |
| Ka-band | 100 | 200 | 300 | 400 | 500 | 600 | 700 | 800 | 900 | 1,000 | 1,100 | 27.1% |
| Hybrid | 100 | 200 | 300 | 400 | 500 | 600 | 700 | 800 | 900 | 1,000 | 1,100 | 27.1% |
| TOTAL | 500 | 1,000 | 1,500 | 2,000 | 2,500 | 3,000 | 3,500 | 4,000 | 4,500 | 5,000 | 5,500 | 27.1% |
| <i>Broadband</i> | 100 | 200 | 300 | 400 | 500 | 600 | 700 | 800 | 900 | 1,000 | 1,100 | 27.1% |
| <i>Narrowband</i> | 100 | 200 | 300 | 400 | 500 | 600 | 700 | 800 | 900 | 1,000 | 1,100 | 27.1% |
| <i>GSO</i> | 100 | 200 | 300 | 400 | 500 | 600 | 700 | 800 | 900 | 1,000 | 1,100 | 27.1% |
| <i>NGSO (inc. Iridium)</i> | 100 | 200 | 300 | 400 | 500 | 600 | 700 | 800 | 900 | 1,000 | 1,100 | 27.1% |
| <i>NGSO (exc. Iridium)</i> | 100 | 200 | 300 | 400 | 500 | 600 | 700 | 800 | 900 | 1,000 | 1,100 | 27.1% |

Source: Valour Consultancy

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Sample Chart 1 - GSO and NGSO Satellite Connectivity Terminals on VVIP and Business Aircraft





Overview

Valour Consultancy conducted more than **40 interviews** with a variety of companies involved in the cockpit and cabin applications market. This includes:

- Aircraft OEMs
- MROs and Completion Centres
- Connectivity Service Providers
- IFEC/CMS Equipment Manufacturers
- Satellite Operators
- Fleet Operators
- Corporate Flight Departments

Coverage includes...

Accurate data on the current market size for IFC, IFE and CMS systems

Forecasts out to 2031 with robust justifications including the ongoing impact of the COVID-19 pandemic

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

Thorough explanation of key drivers and inhibitors of market growth

Discussion of the technology trends that will shape solutions in the coming years

Market shares and detailed profiles of established companies and notable new entrants active in the market




Analysis of different business models and positioning strategies



Report Access

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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. This growth was officially recognised in 2020 when we were honoured with the prestigious Queen's Award for Enterprise in the category of International Trade.

Since inception, our analysis has primarily centred on the mobility market and several major names in the aviation, maritime and land mobility markets continually rely on our expert insight and analysis. In 2021, we were joined by John Devlin, founder of P.A.ID Strategies, and subsequently expanded our coverage to encompass payments, authentication, identity and the security and connectivity of people, devices, objects and transactions.



Our Values

Valour Consultancy continues to operate in accordance with the three core values it was founded upon – **Honesty, Trust** and **Time**. Doing so has enabled us to deliver detailed and meaningful insight and establish long-lasting relationships in the process.

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