



Industry analysts say passenger expectations are higher than they have ever been. Image: Cathay Pacific

Palace of varieties

Airlines and their content service providers are sourcing ever more and varied content to keep passengers entertained. Emma Kelly looks at what's currently showing on seatback screens.

When it comes to content on seatback in-flight entertainment (IFE) systems, airline passengers are more demanding and voracious than ever before.

Airlines and their content service providers (CSP) are responding with more content and variety, as well as using all the tools available to meet passengers' expectations.

"Passengers have higher expectations than ever before due to the proliferation of usage of streaming services on the ground," says Maura Chacko, Senior Vice President Content Experience at Spafax.

Higher expectations also bring benefits. "There are so many streaming services that IFE now has the opportunity to become a

platform that consolidates a lot of content people want to watch in one place," Chacko says.

She adds that it also means Spafax can curate content to align with each airline's brand, demographics and overall objectives by expanding its supplier base, providing unique and exclusive content and partnerships and customising marcomms strategies to promote content.

Estibaliz Asiain, Senior Vice President, Media and Content at Anuvu, concurs.

She says: "Since the pandemic, we have seen a shift in passenger expectations in IFE, with demand for a broader range of available content driven by the increased user base of

streaming platforms. We have also noticed an increased demand for short form and native digital content, coinciding with the increased use of these on the ground."

CHANGING TASTES

The popularity of movies continues, but their dominance might not last, suggests Summer Staninski, Market Research Analyst at Valour Consultancy, and author of its recently published deep dive into the topic, *The Future of IFE Content 2024*.

Staninski says: "Movies, particularly Hollywood new releases, are still on top despite the myriad of other options. We expect to see this changing and some streaming platform content and IFC impacting this in the future, but for now it seems passengers mostly want to watch new release movies."

There is growing passenger appetite for independent movies, episodic series and



Regional content has emerged as an important component of the overall IFE content offering. Image: British Airways

international content, according to Anuvu.

“Airlines are increasingly looking for content that resonates with a wide range of different audiences, but also caters to niche passenger tastes,” says Asiain, pointing to regional content as an example.

Regional content has grown beyond local viewership in recent years, says Spafax’s Chacko, highlighting the global popularity of Korean dramas and regional versions of reality shows.

“We know for some airlines, it is just as important to have regional content on board as it is to have the latest hit blockbuster, chart-topping album or hit series,” says Sam Allen, Managing Director, Stellar Entertainment.

Allen points to client Air India and partnership with Indian company Skyscreen, which supplies Bollywood and Indian regional content expertise.

“For Air India, it’s essential to have strong Indian content,” says Allen, with its upgraded IFE including 250 Bollywood and 76 Indian regional movies in eight languages.

Regional content will continue to be important, Staninski believes.

“Geopolitical tensions mean that regions

such as China and Russia aren’t interested in Hollywood content,” she says. “Furthermore, most airlines can get Hollywood content and are realising that passengers want a taste of their destination, so showcasing local content

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Valour Consultancy

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can help them differentiate themselves from other airlines. Like independent content, regional content can also help to fill the gaps in Hollywood content.”

Airlines are forging more direct partnerships with studios, streaming platforms and other content owners to deliver variety, says Staninski.

Meanwhile, Hollywood is producing fewer movies than pre-2020, resulting in CSPs partnering with a variety of content owners.

This can also bring a greater variety of genres such as comedy, drama and documentary, rather than the action, sci-fi and fantasy movies that dominate the box office currently, Staninski adds.

NEW TRENDS

Educational, health and wellbeing content is another trend that airlines are committed to.

Health and wellbeing grew in prominence during the pandemic on the ground and it was inevitable that this would transfer to in-flight.

“It also makes sense that airlines would offer some sort of digital wellness content in the air, especially as flying can be very stressful and it’s important to stretch, eat and stay hydrated,” says Staninski, adding that this kind of content is here to stay.

The latest IFE systems support large volumes of content, providing opportunities for differentiation, says Chacko.

In health and wellness, for example, Spafax has an exclusive partnership with Feel Better Live More, while it also offers BBC Maestro educational courses covering everything from writing to cooking to music production.

The documentary genre is also proving popular in the air, having started on ground-based streaming platforms.

“We are also seeing destination content grow to include exploration of points of interest on the moving map,” says Staninski, which is engaging and educational but can also provide airlines with ancillary revenue opportunities.

“There is a drive to be able to offer a streaming service-style experience on board, so educational, health and wellbeing and indie content all play into this, as do other categories, including short form TikTok-style content, podcasts, audiobooks or even slow TV,” says Stellar’s Allen.



In the moment: live sport is an increasingly popular content option. Image: Emirates

A popular category is “award winners”, he says, with Stellar launching the Stellar Awards Hub, powered by its pixL content management platform, to help airlines identify which award-winning content, including streaming originals, are available to licence for IFE.

Interest in audio is stronger than ever, according to Asiain, with Anuvu investing in unique audio experiences, including a podcast featuring interviews with DJ Fatboy Slim that was available on Virgin Atlantic flights before mainstream podcast platforms, as well as partnering with Podo, the world’s largest Arabic podcast platform.

Variety remains key.

“The passenger mindset varies depending on many factors,” says Asiain. “Time of day of the flight, the stress of getting to the airport or delays, if they’re on a business or personal trip.

“With that, some passengers want familiar and comforting content, and others want to discover something new. Sometimes, the same passenger wants one at one stage of the flight and the other at another.

“Familiar content and new types of content offer the airline a chance to engage and connect with their passengers emotionally, which builds satisfaction and loyalty.”

Live television continues to play a role and is

expected to become more important, boosted by major sporting events this year including UEFA Euro 2024 and the Paris Olympics.

GOING LIVE

DirecTV Inflight provides services on more than 1,800 aircraft operating in the US with JetBlue, United Airlines, American Airlines, Delta Air Lines and Southwest.

Vinny Caruolo, Senior Business Development and Sales Manager, Commercial and Private Aviation, says DirecTV is constantly looking to add to its menu.

“In the near to medium term, we anticipate changes in IFE content, particularly regarding the fragmentation of sports programming due to individual leagues, teams and conferences seeking specialised licensing deals,” he says.

“Despite this fragmentation, DirecTV Inflight strives to enhance the entertainment experience for travellers.

“Our commitment lies in securing comprehensive sports broadcasting rights to maintain DirecTV Inflight’s position as the leading provider of in-flight entertainment. We aim to offer an unparalleled selection of live sports to airline passengers.”

Caruolo says the company continually monitors viewing habits and adapts its

services in response. It is “constantly exploring opportunities to expand our offerings”, including internationally.

Live TV content is proving popular on international services that offer it, including Emirates, Qatar and Air New Zealand.

Emirates’ ice IFE, for example, includes Sport 24, BBC World News, CNN and Sky News Arabia.

“Live TV is still relevant for big, live events, particularly sports, but there are also opportunities to leverage connectivity for OTT [over-the-top] streaming services on board for must-see events such as King Charles III’s coronation, for which we partnered with BA and Red Bee Media to stream live on board,” says Spafax’s Chacko, who predicts future growth.

Meanwhile, airlines and CSPs are using the latest technology to curate the best content.

“We use data to drive the content strategy and test new content opportunities and partnerships,” says Chacko.

REGIONAL INSIGHTS

Spafax has its own data analytics platform, Spafax IQ, which provides a comprehensive analysis of content usage and return on investment, as well as on-the-ground data analytics and trend analysis.

“All of this is supported and managed by data scientists and content experts with years of expertise and gut instinct to find new and unique content at festivals and markets ahead of the curve,” Chacko says.

Spafax also has a team of 10 world content experts, each handling a different regional portfolio.

“Providing content on board is no easy task,” says Anuvu’s Asiain, adding that there are three critical elements required for success: creative content, local and regional expertise, and advanced technology.

Anuvu has built extensive teams in regional hubs, including Hong Kong, Singapore and Dubai, to gain regional insights.

“As the CSP for over 50 per cent of airlines in the market, we have more access to audience feedback, onboard viewership and industry data than any other provider, says Asiain.

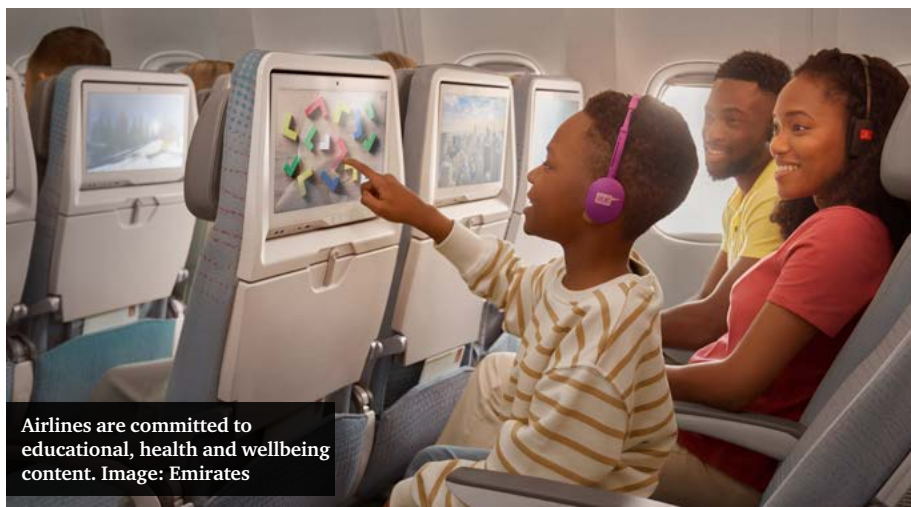
“We combine that information with industry-leading data providers and our proprietary analysis tools to stay ahead of industry trends, measure demand, evaluate performance and, ultimately, curate content that aligns with a diverse global demographic.”

Stellar relies on in-house content expertise, data analytics and monitoring trends on the ground to meet clients’ content needs.

“This will only continue to get more detailed and granular over time, particularly with the introduction of artificial intelligence,” says Allen.

DATA-DRIVEN DECISIONS

This year, Stellar is launching the pixLGPT AI programming tool that Allen says will “aid our team and airline clients in curating thematic programming and pulling data from our in-house database and IMDB”.



Airlines are committed to educational, health and wellbeing content. Image: Emirates

All airlines want to make data-driven decisions, but this can be a lengthy process, says Valour’s Staninski.

“Many of them [in our research] expressed that it takes too long to see the data and this is because it’s captured by the IFE system, then needs to be extracted by the OEM, then provided in raw form to the airline, then analysed into meaningful insights by the CSP,” she says.

Airlines can go through three content selections before they see engagement data. But the process is expected to accelerate.

“We expect to see data captured and processed in real time – especially with more IFC – and we expect that this will inform much of the content selection,” Staninski predicts.

She expects to see the amount of content continue to increase, but its lifespan on board will reduce. Meanwhile, the amount of cached content will decrease as IFC becomes cheaper and more widespread.

Audio and live streaming, including live TV, are expected to grow, with podcasts

and audiobooks in particular likely to take off thanks to their surge in popularity on the ground.

Wellness content is also expected to continue its upward swing, while Staninski also expects to see more partnerships between airlines and streaming platforms, not just for movies and TV but also for Spotify, Audible and PressReader.

“Live streaming will also be available nearer to 2030,” says Staninski. “We are seeing technologies such as edge-caching, where AI predicts popular titles to be stored locally while more niche titles are streamed via IFC. Up to 90 per cent of viewer requests in flight can be fulfilled using a single stream from the onboard server, which saves a lot of bandwidth.”

Anuvu, Spafax and Stellar all anticipate that content will increase.

“Storage capacity is getting bigger, encoding and delivery of content is getting faster and more cost-effective, and licence deals can be negotiated to cater to volume,” says Stellar’s Allen – but personalisation and navigation will be vital.

The key with large volumes is a comprehensive marcomms strategy to guide passengers to the content they want or want to discover, notes Chacko.

“Even with large volumes, promotions and signposting can engage passengers so that they feel the content was selected and recommended just for them,” she says.

“A cohesive content strategy includes marcomms and signposting, as well as customised promo videos and productions that will guide passengers and allow them to

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Estibaliz Asiain, Senior Vice President, Media and Content, Anuvu



Popcorn time: Hollywood new release films remain the most popular option.
Image: Emirates

engage with curated content that caters to their needs and wants.

“The more we can differentiate the IFE for each airline partner, the more we can build brand loyalty through the emotional connection that content provides.”

INCREASED PERSONALISATION

“Thoughtful content curation” is required to ensure passengers enjoy the experience, suggests Anuvu’s Asiain, predicting more intricate customisation in content delivery, tailored to the needs of individual passengers, thanks to technology and data. This could also be accompanied by personalised advertising and promotion.

“Based on the trends we saw in 2023, we responded by signing over 150 partnerships for a more diverse range of content offerings, including select entertainment from all major studios, award-winning independent studios and popular streaming brands,” Asiain says.

In-flight it’s important to guide passengers and avoid the paradox of choice experienced with streaming on the ground, agrees Staninski.

“IFE systems are not great at doing this,”

she says, but personalisation will grow with technology, including connectivity.

Staninski points, for example, to Delta’s personalised experience for its Sky Miles members, whereby you can watch a movie from where you left it during a previous flight by logging into your account.

Leveraging smart metadata and combining it with frequent flyer information and passenger manifests on a connected fleet will enable personalisation, as well as targeted advertising, says Stellar’s Allen.

Stellar’s pixL enterprise resource management application has API functionality and connects to IMDB for movie and TV metadata, box office information and IMDB scores.

“There is also the possibility of creating tailored ‘smart’ metadata that aligns with airline KPIs,” Allen adds. “By leveraging AI, it’s possible to manipulate metadata to reflect an airline’s brand and key messaging, utilising AI to analyse their content set and consistently include their brand keywords in their metadata set to subtly promote their messaging.”

CSPs will continue to reduce the time

between selection of content and delivery on board, Asiain says.

“Faster end-to-end supply chains like our proprietary platform and connectivity capabilities will enable the dream of changing certain content within 24 hours to the aircraft,” she adds.

Migration to the cloud will allow this, with Staninski predicting this to be one of the biggest changes ahead.

CHANGING THE CYCLE

Cloud-based content processing labs can shrink the content cycle from 90 days to less than 10 days – from selection to onboarding – thanks to automating technical services, standardisation through centralised databases and delivering content over the air.

“As the content delivery pipeline migrates to the cloud, we can expect content to be refreshed quickly and remotely so that it takes merely a week from content selection to onboarding,” says Staninski. “As a result, an airline can offer more titles for a shorter period of time.”

Technology could even allow episodic content to be released as it comes out on a weekly basis, delivering parity with the ground.

But CSPs will need to adapt accordingly.

“Airlines haven’t been happy with the current content cycle for many years,” says Staninski. “However, there has never been an alternative.

“Now that cloud technology has entered the market, airlines can choose a faster and cheaper option. This will become the future of content licensing and anyone that doesn’t embrace the change is at risk of being left behind.

“We expect that larger airlines will be able to acquire Hollywood content on their own and that CSPs will become experts in independent and local content that is more heavily tailored to the passenger, while content from the Big Five studios is pre-emptively processed and integrated into the IFE systems ready to be licensed quickly by an airline so that it can be onboarded.

“If more data can be provided to the airline as well, then they can experiment with content and quickly remove and replace titles that aren’t popular with passengers, as well as keep the most engaged on board for longer.” ■

