

Inflight Entertainment and Connectivity Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The inflight entertainment and connectivity market was valued at USD 3.64 Billion in 2021, and it is expected to register a CAGR of 7.77% during the forecast period (2022-2027).

The COVID-19 pandemic resulted in a full-scale crisis, with the imposition of travel restrictions and suspension of flights in a global effort to contain the spread of the virus. The aviation industry was in survival mode, crippled by traffic loss and revenues in 2020. This subsequently affected the aircraft deliveries and revenues of tier-1 suppliers of aircraft programs. However, the aviation industry gradually recovered from the pandemic in 2021, resulting in increased aircraft deliveries. This recovery in the aviation industry and aircraft deliveries is propelling the investments of airlines and aircraft operators in line- and retrofit new cabin entertainment systems to enhance passengers' experience.

The increasing demand for streaming services led to passengers expecting both high-definition content and uninterrupted connectivity at their fingertips. Additionally, the widespread use of electronic devices, such as smartphones, tablets, and laptops, led to a new trend of inflight connectivity, and airlines offering Wi-Fi connectivity to passengers to access inflight and other entertainment content on their devices.

Inflight Entertainment & Connectivity Market Trends

The Content Segment Held The Largest Market Share in 2021

Inflight entertainment has been a major value addition to airlines' services on domestic and international flights across various geographies. More specifically, flights traveling on long routes internationally have a much higher requirement for in-flight

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entertainment to be offered to the passengers. The aviation industry witnessed a significant high in terms of global revenue from passengers, with a peak of USD 607 Billion as of 2019, dropping steeply from 2020 due to the pandemic. Owing to such a high number of passengers, many airlines have invested in either offering new entertainment packages or updating existing in-flight entertainment packages across their aircraft along multiple routes. For instance,

Emirates offers more than 2,500 channels of movies, TV shows, music, and games, all on demand in multiple languages. Similarly, Qatar airlines' Oryx One inflight entertainment system offers travelers more than 3,000 viewing and listening options. There is a large variance of movies offered in different languages and the usual Hollywood offerings. Content additions to the entertainment systems have increased in these large airlines. For instance,

Emirates, in June 2022, brought in the premium content from MBC Group's Shahid (Arab streaming platform) exclusively in their flights, starting from July 2022 on the airlines' Ice platform. Carriers with major operations in domestic regions have also been adding in-flight entertainment systems. India's major passenger carriers, SpiceJet and Air India, have also increased their in-flight entertainment offerings via increased content and partnerships with content providers. For instance,

In the wake of the pandemic, to drive passengers to opt for air travel with increased precautions, India's national carrier, in December 2020, announced a partnership with Aeroplay Entertainment - a boutique content service provider, to offer complete in-flight entertainment content to the passengers. Aeroplay experience in creating tailor-made in-flight entertainment content is expected to redefine the onboard experience of the passengers. Multiple such content additions, airline partnerships with content providers, and a projected increase in passenger traffic between the years 2023 and 2024 are expected to drive the demand for this segment during the forecast period.

Europe will witness the Highest Growth During the Forecast Period

Europe's commercial aviation sector made great strides in the past five years (before the outbreak of COVID-19), and further improvements are expected during the forecast period as the domestic passenger traffic has been steadily recovering from the impact of the COVID-19 pandemic since early 2021. With the projected increase in passenger traffic by 2023-2024, several airlines have invested in upgrading or replacing their existing inflight entertainment systems. With Europe home to some of the large global airlines, the region is expected to benefit the most with the highest growth rate during the forecast period.

Major airlines across Europe have been partnering with IFEC providers to match the needs of the passengers choosing their airlines. For instance, in May 2022, Air France presented its new long-haul business class seat, designed and assembled by Safran Seats, which is expected to be fitted on its fleet of twelve Boeing 777-300s starting in September 2022. This 180-million-euro investment is part of the airline's strategy to move upmarket. These more comfortable seats feature new Safran 4K screens, which are wider, anti-glare, and have a better image resolution, guaranteeing an optimal IFE experience. In October 2021, Air France would install Intelsat's 2Ku high-speed satellite In-Flight Connectivity (IFC) service on 60 new A220-300 aircraft. Furthermore, in May 2022, Panasonic Avionics Corporation (PAC) was selected by Lufthansa to provide its NEXT in-flight entertainment (IFE) system and connectivity solutions for the carrier's Boeing 747-8 fleet. The NEXT systems are expected to be retrofitted on Lufthansa's 19 Boeing 747-8s, with the first roll out in summer 2024.

Owing to several such partnerships across the region and the large number of major airlines operating, the demand for IFEC systems is expected to grow significantly in Europe during the forecast period.

Inflight Entertainment & Connectivity Market Competitor Analysis

The major players in the commercial aircraft inflight entertainment and connectivity market are Panasonic Corporation, Anuvu (previously Global Eagle Entertainment Inc.), ViaSat Inc., Inmarsat Global Limited, and Thales Group. The revenues of the market

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players are also cyclic, as they depend on aircraft sales and airline retrofit programs. The IFEC system manufacturers invest in developing advanced associated systems integrated into modern aircraft to complement or enhance their characteristics, including safety and aesthetics. Such investments result in the companies being exposed to certain risks associated with design responsibility, new production tool development, increased capital and funding commitments, delivery schedules, and unique contractual requirements. Moreover, new aircraft programs may be prone to cost-overrun, delays, or termination, depending on the market conditions, which may affect the market prospects of the players during the forecast period.

In addition to the connectivity and entertainment systems providers, the content providers are gradually increasing their share in the market through partnerships with various airlines. In this regard, in January 2022, Asiana Airlines Inc. selected Anuvu as its Content Service Provider (CSP). Under the agreement, the company is expected to provide global films and diverse TV options onboard the flights of Asiana Airlines. Such developments are anticipated to strengthen the geographic presence of various companies in the future.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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