

Europe Inflight Entertainment and Connectivity - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Europe Inflight Entertainment and Connectivity Market size is estimated at USD 199.17 million in 2024, and is expected to reach USD 227.22 million by 2029, growing at a CAGR of 2.67% during the forecast period (2024-2029).

The COVID-19 pandemic had a major effect on Europe's Inflight Entertainment and Connectivity Market. The onset of the pandemic led to various countries within the European region closing their borders, imposing travel restrictions, and suspending flights in an effort to contain the virus. The border and travel restrictions led to a decline in the number of air traffic passengers. Moreover, the demand for purchasing of new aircraft witnessed a decline and this led to an overall decline in the demand for advanced inflight entertainment systems leading to various manufacturers of inflight entertainment systems witnessing huge losses. On the other hand, with the decline in the COVID-19 pandemic, various windows of opportunities have once again opened up in the market. With various countries in the European Union lifting travel bans and restrictions, there has been an increase in the number of air passenger traffic in the European region in the few years. The increase in air passenger traffic has also propelled growth in the production of newer aircraft to accommodate the air passenger traffic. This had led to various countries in the European region planning out programs in order to equip their aircraft with the latest inflight entertainment systems thus providing opportunity to inflight entertainment system manufacturers to develop advanced systems and increase their profit margin. Thus, such developments will lead to the market witnessing significant growth during the forecast period.

Increasing passenger traffic in the region is demanding the procurement of new-generation aircraft, which, in turn, is generating demand for inflight entertainment and connectivity systems. Installation of new and high-speed connectivity solutions, along with the increasing digitization on board (e-magazines, online streaming of movies and TV shows, etc.), and the use of personal electronic gadgets for streaming (Bring Your Own Device concept) are expected to act as the major drivers for the growth of the market during the forecast period.

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Europe Inflight Entertainment & Connectivity Market Trends

By Product Type, The Connectivity Segment Is Expected To Witness Significant Growth During The Forecast Period

By product type, the connectivity segment is expected to witness significant growth during the forecast period. The demand for connectivity has witnessed significant growth during recent years which has led to various passengers prioritizing connectivity over other amenities which are provided to them in-flight. To cater to this demand, the airlines in the European region have collaborated with various inflight connectivity providers such as Gogo LLC, Inmarsat, and Global Eagle amongst others to integrate their existing systems with LTE technology and satellite communication technology. For instance, as of February 2022, AGEAN airlines announced that their onboard will accelerate further with the introduction of high-speed inflight broadband which has been powered by the European Aviation Network or EAN. The service, which is known as EAN is a hybrid network built by Deutsche Telekom and Inmarsat in cooperation with their technological partner Nokia. EAN offers high-speed internet with low latency, with significantly less downtime and reduced operating costs thus propelling the increasing adoption of this technology by various airlines such as British Airways, Aer Lingus (IAG), Iberia, Vueling, and Lufthansa.

In the present scenario, airlines have been finding various ways in order to help provide better connectivity services to their passengers. In the past years, making use of mobile phone networks within airlines had been strictly prohibited with passengers needing to enable airplane mode on their mobile phones in-flight. On the other hand, new norms which is being enabled by the European Commission will soon lead to passengers receiving 5G technology on board the flight. According to statements released by the European Commission in November 2022, passengers aboard flights in the European Union will be able to use their mobile phones to the maximum capacity and features similar to how the passengers made use of their mobile phones when on the ground. Moreover, according to the European Commission, making use of 5G will lead to airlines innovating services and growth opportunities for European companies. Thus, developments such as the ones mentioned above will lead to the market witnessing significant growth during the forecast period.

Germany is Expected to Witness Significant Growth During the Forecast Period

The country of Germany is expected to witness significant growth during the forecast period. The growth in the air passenger traffic demand in the German region coupled with fleet modernization programs, equipping aircraft with new in-flight connectivity solutions will be the main factor for the growth of in-flight connectivity in Germany during the forecast period. According to the Federal Statistical Office of Germany (Destatis), the German aviation industry witnessed a significant increase in the number of air passenger traffic with passenger numbers tripling by 215.1% during the month of June 2022 as compared to June 2021. According to the data released by Destatis, approximately 16.3 million air passengers arrived at or departed from commercial airports in Germany in June 2022.

The German country is witnessing substantial growth in inflight entertainment and connectivity. Flag carriers of Germany such as Lufthansa as well as other airlines in the country are now focusing on providing advanced inflight entertainment to their passengers in order to increase the level of customer satisfaction on board the flight. The inflight entertainment system of Lufthansa comprises multi-level entertainment systems to keep flyers engaged during long-haul flights. The airline empowers passengers with the freedom to decide on the channel, the type of music to listen to as well as which programs to see. This has been made possible through the huge selection of entertainment options aboard the flight. Moreover, the availability of inflight entertainment in various languages such as English, German, Spanish, French, Italian, Korean, Chinese, Portuguese, Korean, and Japanese has led to the airlines ensuring that the passengers have a hassle-free experience on board their flights. Thus, such developments will lead to the market witnessing growth during the forecast period.

Europe Inflight Entertainment & Connectivity Industry Overview

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Some of the few prominent players in the European inflight entertainment and connectivity market are Global Eagle Entertainment Inc., Thales SA, Panasonic Corporation, Viasat Inc., and Inmarsat Global Limited amongst others.

Companies are now collaborating to offer better entertainment and connectivity options to the airlines in the region. For instance, in 2022, Deutsche Telekom and Inmarsat, together with their technology partner Nokia, developed European Aviation Network (EAN), which provides high-capacity satellite coverage with a complementary 4G LTE ground network to provide high-speed network coverage. Such collaborations are increasing the concentration in the market, thereby, increasing the competition among players. Companies are also working toward the developments of advanced IFE hardware that helps enhance the passenger experience.

Additional Benefits:

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

Table of Contents:

1 Introduction

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 Research Methodology

3 Executive Summary

4 Market Dynamics

- 4.1 Market Overview
- 4.2 Market Drivers
- 4.3 Market Restraints
- 4.4 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.4.1 Threat of New Entrants
 - 4.4.2 Bargaining Power of Buyers/Consumers
 - 4.4.3 Bargaining Power of Suppliers
 - 4.4.4 Threat of Substitute Products
 - 4.4.5 Intensity of Competitive Rivalry

5 Market Segmentation

- 5.1 Product Type
 - 5.1.1 Hardware
 - 5.1.2 Content
 - 5.1.3 Connectivity
- 5.2 Fit
 - 5.2.1 Linefit
 - 5.2.2 Retrofit
- 5.3 Class
 - 5.3.1 First Class
 - 5.3.2 Business Class

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- 5.3.3 Economy Class
- 5.4 Country
 - 5.4.1 United Kingdom
 - 5.4.2 Germany
 - 5.4.3 France
 - 5.4.4 Rest of Europe

6 Competitive Landscape

6.1 Vendor Market Share

6.2 Company Profile

6.2.1 Thales SA

6.2.2 Lufthansa Systems

6.2.3 Inmarsat Global Limited

6.2.4 Panasonic Corporation

6.2.5 Immfly

6.2.6 Burrana

6.2.7 ViaSat Inc.

6.2.8 Raytheon Technologies Corporations

6.2.9 Safran

6.2.10 Global Eagle Entertainment Inc.

6.2.11 Honeywell International Inc.

6.2.12 Gogo LLC

7 Market Opportunities and Future Trends

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