

BUILT TO FLY


inmarsat
AVIATION

Passenger Experience Survey 2022



What we expect in ~~PASSENGER EXPERIENCE~~ ~~SURVEY 2022~~ and beyond

Customer experience is important to any business. Right now, recognising and understanding the needs of passengers has a renewed importance; recent years have seen a period of accelerated change. Passengers' lives have changed – so how does that alter what they expect from an airline?

To find that out, we surveyed over 11,000 passengers across the globe.
What did we find? Passenger desires and beliefs have changed.

The unmissable trend is that the confidence to fly has returned (eight times more so than last year). To capitalise on that surge and capture new market share, airlines must deliver a better passenger experience. When surveyed, passengers gave a very clear picture of what that means to them. 77% of them now view inflight Wi-Fi as critical to the experience – a 40% increase compared to before the pandemic. This increase isn't surprising: 30% of passengers now feel more confident using their devices onboard – and 97% now use their own personal devices when flying.

The importance passengers place on inflight Wi-Fi is reflected further by their intention to keep booking with the airlines that keep them connected.

Getting the passenger experience right is crucial for airlines. Appreciating what passengers want brings with it a commercial reward.

30%

of passengers now feel
more confident using
their devices onboard

Passenger confidence has seen uplift

Great to be back onboard!

Coming off the back of such a sustained crisis, the great news is people want to fly, they want to travel – their confidence has returned in a big way.

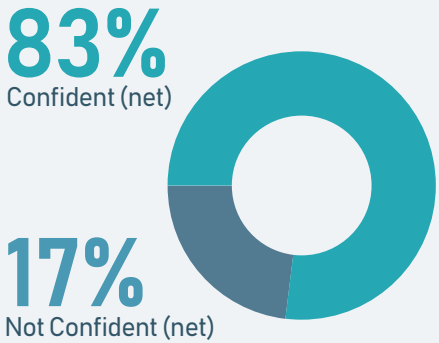
Just one year ago, only 10% of passengers felt confident flying. Now, that figure stands at 83%, with those in Brazil and the Middle East the most confident.

The post-pandemic recovery has seen the emergence of a new type of passenger. As work and leisure are increasingly blurred, a new hybrid passenger can be identified. These passengers are a combination of both business traveller and holidaymaker.

Now I can work from anywhere I'll travel even more.

As our lives become even more digitalised, flyers expect the same connected experience in the air as on the ground. A disconnection is more noticeable than ever, as 57% of people are spending more than five hours per day, looking at their phone.*

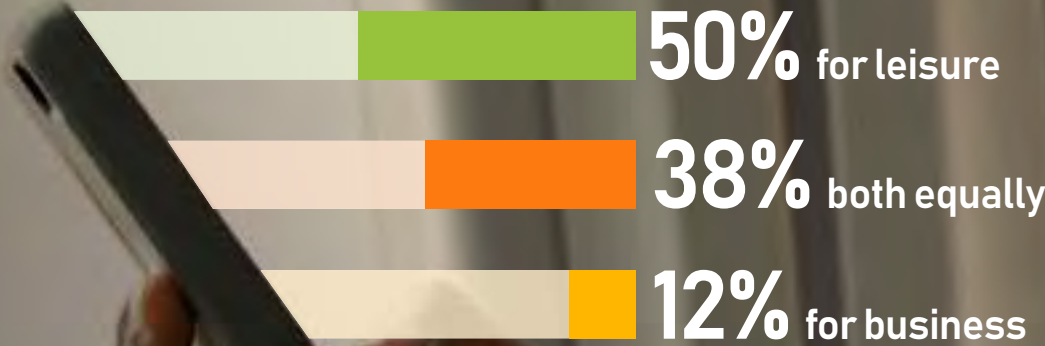
Q: Following the COVID-19 pandemic, how confident are you, if at all, travelling in the air today?



Confidence %	
UAE	91%
Brazil	90%
Saudi Arabia	90%
India	88%
USA	85%
UK	81%
Australia	79%
Singapore	79%
Germany	71%
South Korea	53%

* <https://www.statista.com/statistics/1224510/time-spent-per-day-on-smartphone-us/#:~:text=According%20to%20a%20survey%20conducted,average%20on%20their%20phone%20daily.>

Q: What's your reason for flying?



*We really need Wi-Fi
even when*

40% more people feel Wi-Fi is critical to their experience *we fly*

The release of pent-up passenger demand has seen an incredible recovery, and despite teething issues in the ramp up to summer – passengers' appetite to return to the skies is back in abundance.

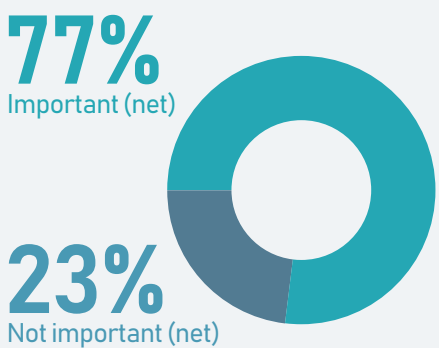
This revival presents an opportunity where airlines can genuinely meet passenger expectations and enhance their experience, allowing airlines to create commercial rewards and an improved reputational standing.

The key to meeting expectations? Keeping passengers connected. When we started tracking how many people felt inflight Wi-Fi was important in 2018, 55% said that it was.

The number of passengers who think Wi-Fi is important to their experience is **now 77%.**

This is no idle claim, either. When inflight connectivity has been available on a flight in the last 12 months, 79% of passengers connected to Wi-Fi. The demand for connectivity is unequivocal – as is the adoption.

Q: How important, if at all, is being connected to Wi-Fi during a flight to you?



*Our lives depend
on it these days*

Q: In the last 12 months, which of the following is true of you when travelling?

6%

I haven't had the option to connect to Wi-Fi

3%

None of these

12%

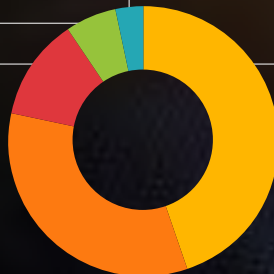
I never connected to the Wi-Fi, but had access

44%

I connected to the Wi-Fi every time

35%

I connected to the Wi-Fi at least once but not every time



~~The data reveals~~ ~~passengers want~~ ~~a connected inflight~~ ~~experience~~

to do the same
in the sky
as we do
on the ground.

Asking passengers what they demand from inflight connectivity does not offer any leftfield responses – but their answers are illuminating nonetheless. In short, they expect their connected lives to remain, well, connected.

This means browsing social media platforms; listening to music, radio, and podcasts; chatting with family and friends via messenger apps; watching movies or TV and streaming films and boxsets. These five activities dominate the to-do list on a flight.

Working is further down the list, yet with over 25% of respondents stating Wi-Fi will enable them to work, it remains a significant factor. Robust and reliable connectivity means passengers no longer have to look at flying as a prolonged period of being unproductive.

And, as previously mentioned, there's a commercial imperative to this too.

Perfect time
to binge-watch
a series.

Q: If available on your flight, what, if anything, would you want to use your digital devices to do?



Connectivity is even more ~~important~~ post-pandemic **ESSENTIAL**

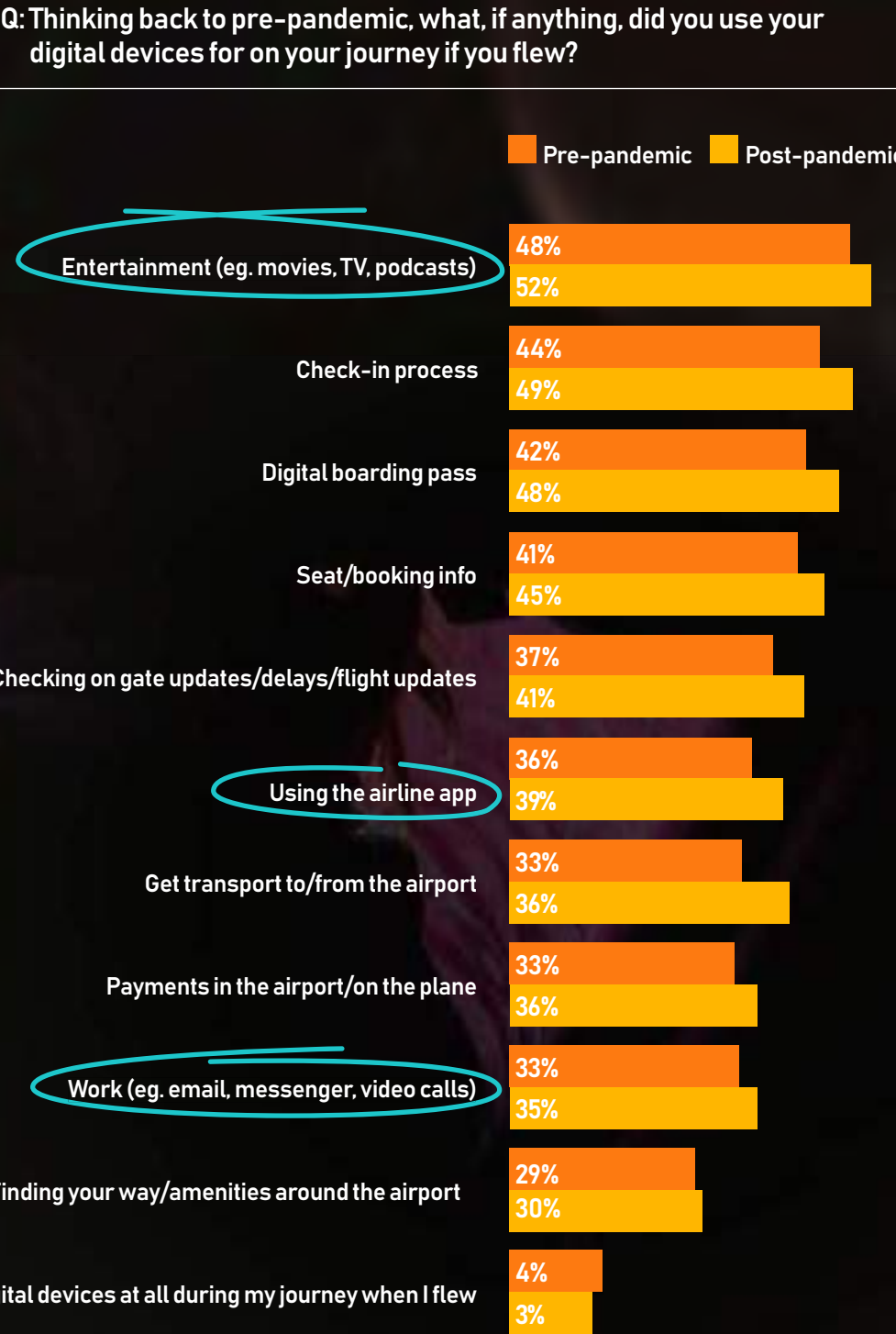
Even before the pandemic, passengers were increasingly using their own digital devices when they flew. But at the height of the pandemic, during our 2020 survey, a third of passengers felt more confident using their own device during their flight. Such a mindset has only accelerated use of passengers' personal devices to the point that today, a massive **97%** of those surveyed use their devices while in the air. It is possible that this shift in passenger behaviour is the driver of the 40% jump in the amount of people who feel inflight Wi-Fi is important.

97%

of those surveyed use their devices while in the air compared to 33% in 2020

While entertainment and work are two popular inflight activities, they're also using airline apps more. Again, this opens up some very interesting commercial opportunities for airlines looking to boost revenue and increase market share – alongside pleasing their passengers of course.

Overall, remaining connected through their own devices in the aviation ecosystem continues to be popular with passengers.



Give us Quality Wi-Fi and we'll keep flying with you. ~~increases likelihood of repeat customers~~

If airlines make good on their promise to deliver high-quality inflight connectivity enabling passengers to do all the things they like doing online, those flyers will use your airline again.

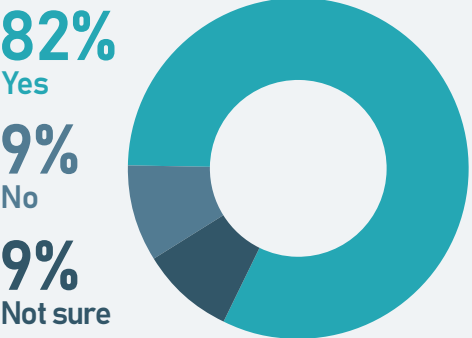
Such is the importance of Wi-Fi to the passenger experience, 82% said they are more likely to travel with an airline again if quality Wi-Fi is available. Over 90% of passengers in Saudi Arabia, the UAE and Brazil agree- while more than 92% of business travellers also agree. This represents a 22% jump

from before the pandemic, when 67% said they would re-book if they were connected inflight.

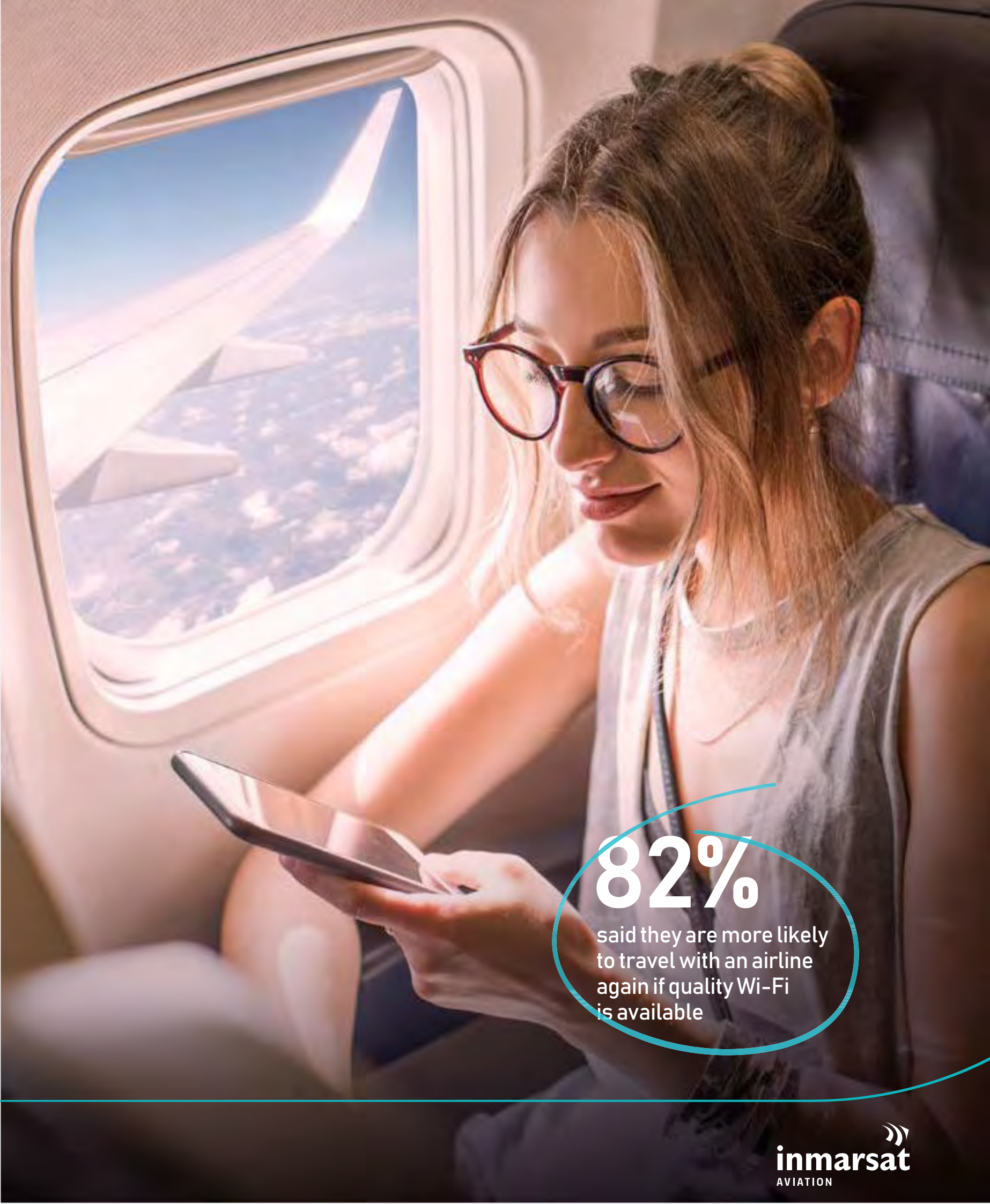
This shows the growing impact that a reliable, consistent and seamless Wi-Fi service has on passengers' onboard experience.

In today's increasingly brand-agnostic times, this should be music to the airlines' ears.

Q: Would you be more likely to rebook with an airline if quality inflight Wi-Fi was available?



Hard to say
goodbye to Wi-Fi



82%
said they are more likely to travel with an airline again if quality Wi-Fi is available

~~A significant cross section~~ of passengers are driving change

Pretty much
all of us

Slice the passenger profile however you like, and one thing is abundantly clear – flyers of every demographic are fuelling this trend.

There are some interesting cohorts to take note of though:

Hybrid passengers:

The people who mix leisure travel with business travel. They're the epitome of the always-on and connected generation. Whether it's fitting in some work around their vacation plans – which 26% of those travelling for leisure do – or vice versa, staying connected is paramount no matter where they are travelling. They simply won't accept anything less.

Families:

Travelling can be a stressful experience – for families with children, especially so. Subsequently, enabling a flight to pass without a hitch by providing the kids with entertainment, either downloaded or streamed onto a personal device, is invaluable. That's why 90% of parents with kids under 18 would rebook with an airline that provided quality inflight Wi-Fi.

Time travellers:

Using their time productively while in the air – watching a film, chatting to friends via a messenger app or listening to music – helps them avoid the feeling of wasted time. With 24/7 productivity increasingly the norm, time to spend doing something worthwhile is vital for these passengers – hence why 77% of passengers say Wi-Fi is important to them.

Vacationer:

Their personal device is their gateway to a pleasant flight and an enjoyable vacation. It acts as their destination guidebook, activity planner, bank account and so much more. With 97% using personal devices during their journey, this multi-dimensional use starts once passengers board the plane – especially for those jumping on last-minute getaways.

Must clear the inbox
before booking
a spa treatment

PAW Patrol on a flight
★ LIFESAVER ★

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Passengers no longer consider inflight connectivity in its own category

Why can't inflight Wi-Fi be like broadband at home?

More passengers than ever want an inflight connection, and with that there are emerging expectations which need to be met. It's key to remember too, a passenger is comparing inflight Wi-Fi to the connection they experience on the ground.

Over a quarter of respondents cited difficulty signing up, saying they found the process ~~too complex~~, which doesn't offer the greatest experience.

exhausting!

For those that got connected, over a third said the connection was inconsistent. In this day and age, almost everyone takes speedy internet for granted on the ground, prompting feelings of frustration when the same can't be achieved in the air.

In some cases the connection works sporadically: 36% found their connection didn't work for the entire flight, causing frustration and clouding their connectivity experience.

Not only will irritated passengers be less likely to rebook, they may also take to social media to air this frustration.

Expect some angry Tweets when we land

Q: When connecting to inflight Wi-Fi, did you experience any of the following?

- 36% The connection was slow or kept dropping out
- 36% I was able to connect but it didn't work the whole flight
- 26% It was complex to sign up and connect
- 25% I reached a limit time/data used
- 22% I paid for more time/data
- 12% None of these

speed
and reliability

The importance of quality for inflight connectivity

Passengers' basic expectations about inflight Wi-Fi have unquestionably risen.

Take the speed of service for example. Passengers expect the connection to be fast enough to handle online basics like streaming, messaging and using social media. For many this is non-negotiable. Almost half (45%) said a slow connection would stop them using inflight connectivity.

Airlines need to consider this when choosing their IFC partner. Will your partner deliver a service that is robust, reliable and seamless?

Once that minimum speed and bandwidth has been achieved, passengers expect a consistent service. Fast speeds mean nothing if the service keeps dropping out – this is a major point of concern for flyers.

frustration

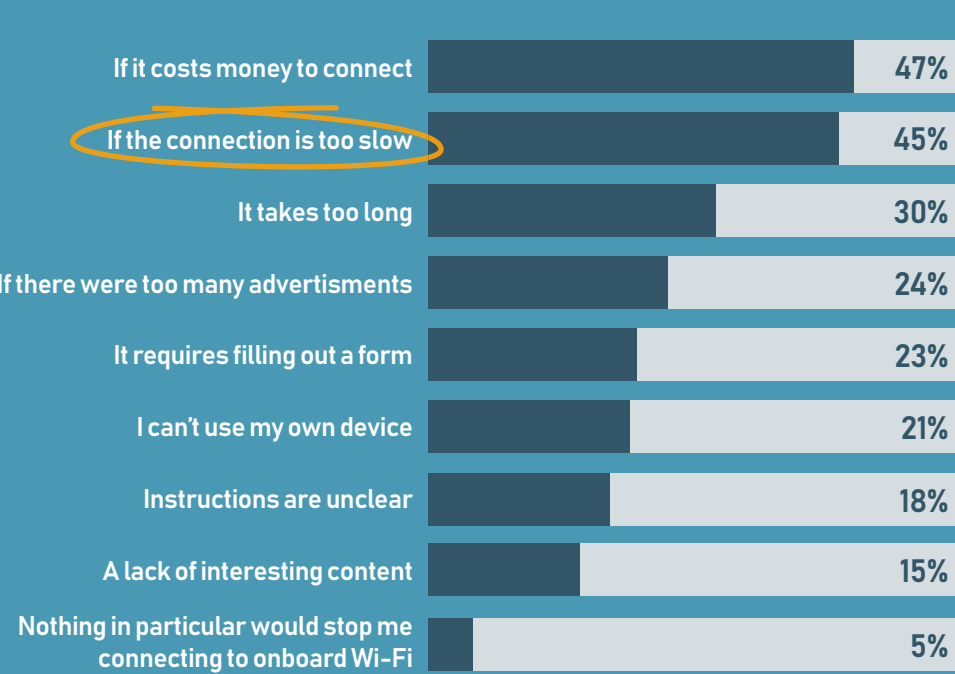
As such, providing assurances about the service, speed and quality that passengers can expect from their inflight Wi-Fi will go down well with them. In fact, almost half of those surveyed (47%) said such assurances would make them confident about connecting.

Interestingly, providing free extras is looked upon fondly. Over 30% said unlimited downloads would serve as an incentive to connect.

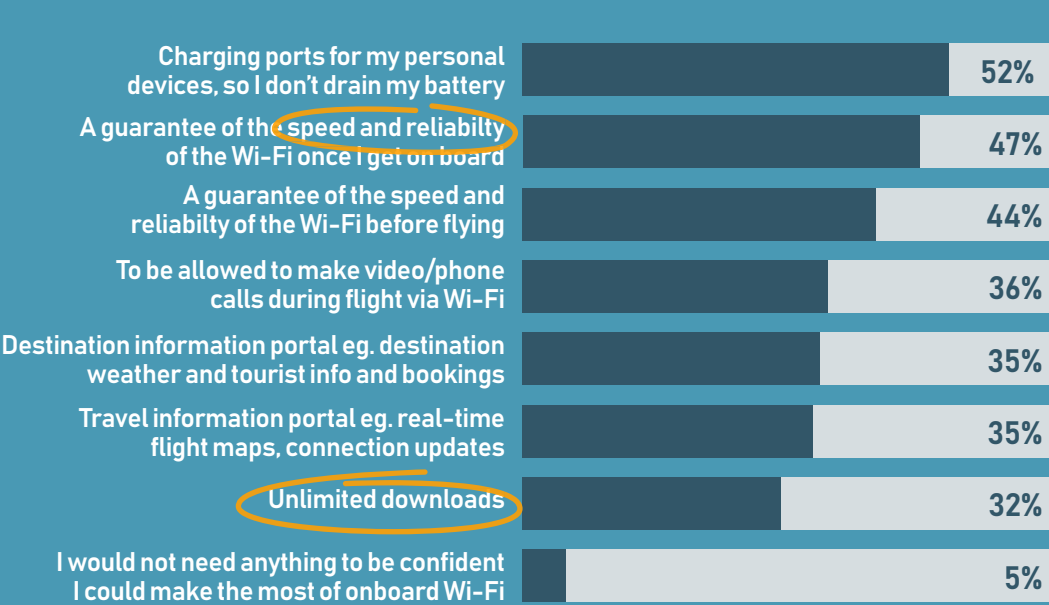
And of course, charging more money for an inflight connection is seen as a significant barrier too.

In short, frustrations should be seen for what they are – opportunities.

Q: What, if anything, would be the most likely factors to stop you from connecting to onboard Wi-Fi?



Q: What, if anything, would you need to be confident you could make the most of onboard Wi-Fi?



They do say:
'Convenience
is king.'

The effect of ancillary benefits on passenger perceptions

Our research reveals that airlines pre-empting potential disruptions stand to make impressive gains.

For instance, providing charging points so passengers don't drain the batteries of their personal devices is a major positive – a crucial point when you consider 97% are using their mobile devices for checking in and while in the sky. In fact, 51% of those surveyed said this would make them confident they could make the most of onboard Wi-Fi.

Ensuring passengers are kept up to date with all relevant travel information (such as travel maps and connection updates) is another plus, according to 35% of respondents. Passengers like staying in control – these enhancements deliver that control.

By making sure the experience is trouble free, airlines stand to make an impression on the 95% of passengers who currently don't feel they get the most out of inflight connectivity.

Dead battery
on arrival
= nightmare



Q: What, if anything, would you need to be confident you could make the most of onboard Wi-Fi?

Charging ports for my personal devices, so I don't drain my battery 52%

A guarantee of the speed and reliability of the Wi-Fi once I get on board 47%

A guarantee of the speed and reliability of the Wi-Fi before flying 44%

To be allowed to make video/phone calls during flight via Wi-Fi 36%

Destination information portal eg. destination weather and tourist info and bookings 35%

Travel information portal eg. real-time flight maps, connection updates 35%

Unlimited downloads 32%

I would not need anything to be confident I could make the most of onboard Wi-Fi 5%

~~The path to improved passenger experience~~

There's a growing expectation that Wi-Fi should simply be free at the point of access.

This is particularly the case when it comes to long-haul flights. Asked when inflight connectivity should be free, 83% of travellers pointed to long-haul travel.

Another interesting takeout is the fact that it's not just younger passengers that expect Wi-Fi to be free. Of those aged 55 and over, 86% simply expect Wi-Fi to be free onboard.

This is compared to 78% of those in Generation Z (those born between approx. late 90s and 2010) cohort – who we largely consider to be our most digitally native generation.

Nearly half (47%) of flyers believe Wi-Fi should be free on short-haul flights too.

*Inflight Wi-Fi - Good
Free inflight Wi-Fi
- Now we're talking! ✓✓*

Q. On what kind of flights, if any, should inflight Wi-Fi be free?



40% of us don't mind seeing adverts

Pricing considerations for inflight connectivity

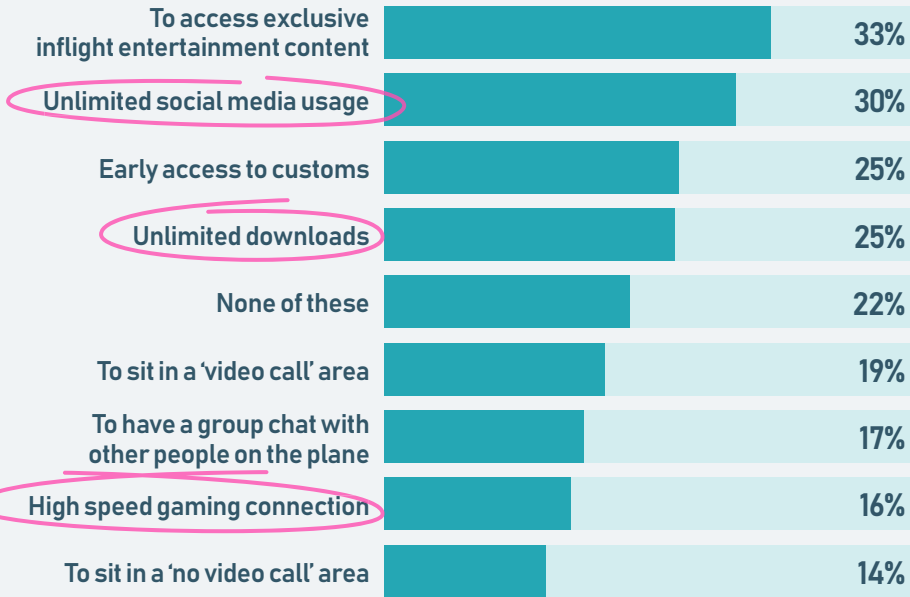
Just as long as the connection is good!

Passengers clearly know what they want and what they expect from an inflight Wi-Fi experience. But some are prepared to make concessions to get the service they demand.

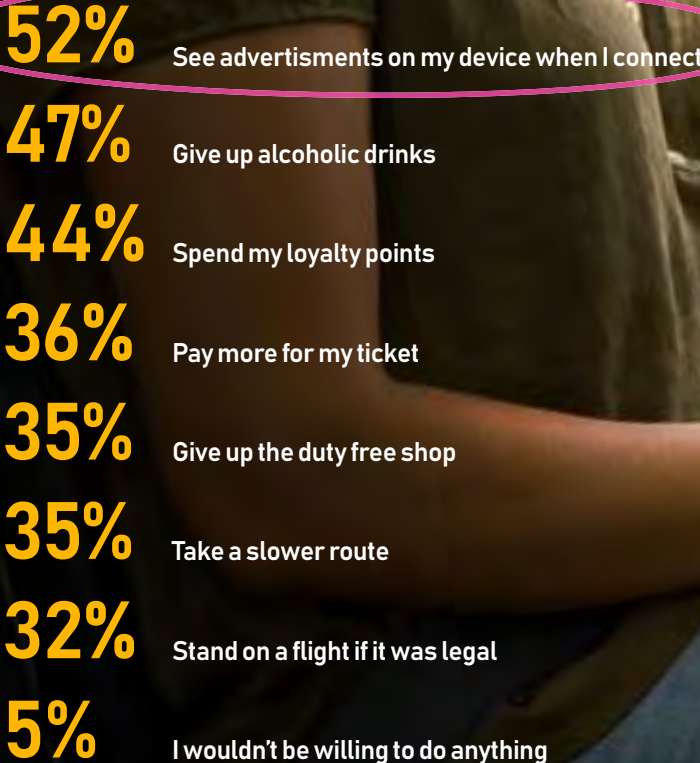
A quarter of passengers state they would pay to get unlimited downloads. And 30% would pay more to receive unlimited social media usage.

Here's where things get really interesting though: almost 40% say they would be happy to see adverts on their device when they're online in exchange for receiving a reliable Wi-Fi connection onboard. This, crucially, opens up a world of commercial opportunities for airlines – and could help fund the investment in quality connectivity in the first place.

Q: Would you pay extra for any of the following?



Q: To get access to reliable Wi-Fi connectivity on a flight, what, if anything, would you be willing to do?



The case for fast and reliable inflight Wi-Fi *IS IRREFUTABLE!*

Three-quarters of those surveyed now want inflight Wi-Fi. A similar number of passengers have tried it when it's been available.

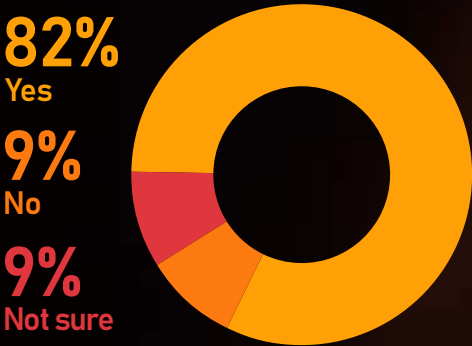
Demand is there. A fact that is undeniable as 82% say they are more likely to rebook with an airline if quality inflight Wi-Fi is available.

In some regions, it's even higher than that, particularly in the UAE, Saudi Arabia and Brazil, where the rate is over 90%.

SIM, É VERDADE!

This average figure rises to 92% when it's business travellers who are being asked the question – compared to 73% of leisure travellers. And 86% of millennials will rebook thanks to quality Wi-Fi – an important benchmark for the expectations of the future biggest spenders.

Q: Would you be more likely to rebook with an airline if quality inflight Wi-Fi was available?



Saudi Arabia	95%
UAE	94%
India	92%
Brazil	91%
South Korea	89%
USA	86%
Singapore	82%
Germany	72%
UK	71%
Australia	68%

■ ■ Watching so many passengers returning to the skies this year has been fantastic to see. The hard work airlines have undertaken to rebuild the sector has been reflected in soaring passenger confidence.

Central to this returning passenger confidence – as our latest Passenger Experience Survey ably demonstrates – has been the role of inflight connectivity. It's a trend we've been following for some years and its importance to passengers keeps growing year on year.

Reliable, no-added cost Wi-Fi is a key cornerstone of passenger expectations when they fly, with the quality of the connection and fair pricing being key. Providing such a service opens up a world of commercial opportunities and possibilities for airlines.

The crucial takeaway then is this: Wi-Fi is the gift that keeps giving for passengers and for airlines' bottom lines. ■ ■

Niels Steenstrup,
President, Inmarsat Aviation

Thank goodness, The future of inflight connectivity is [↑]here finally

The challenge for airlines is balancing the demands of the passenger with oftentimes complex commercial realities. What's required is a flexible solution that can both enhance passenger experience and monetise inflight Wi-Fi for airlines.

Inmarsat's OneFi – delivered through GX Aviation, our reliable, high-speed global inflight broadband solution that has already connected millions of passengers in recent years – does just that. A connected customer experience platform, OneFi brings together a suite of inflight services within a single interface.

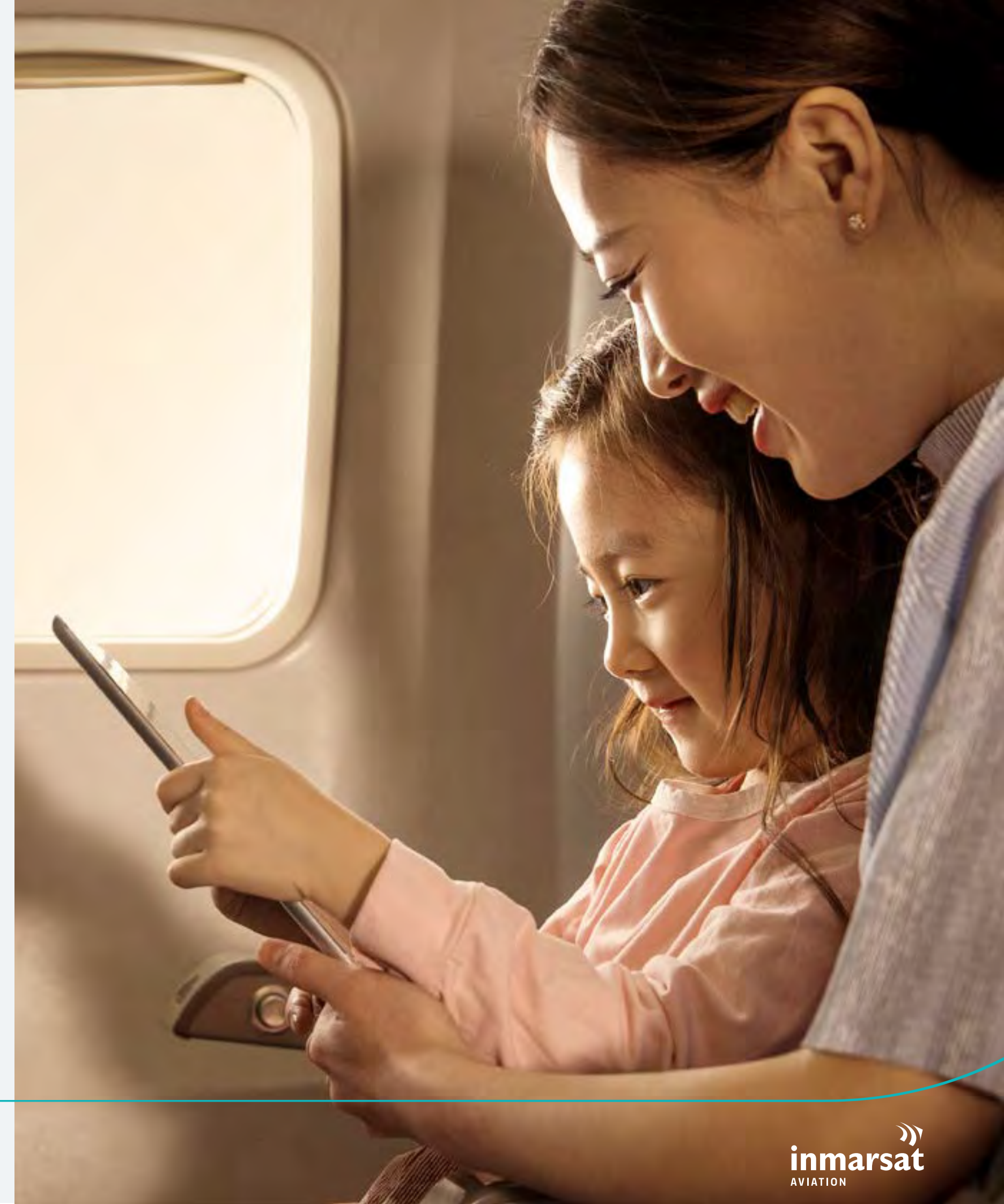
OneFi is a new connected platform which delivers a raft of benefits for airlines, that can be tailored to their unique needs. At its core, it enhances passengers' digital experience and offers the chance to unlock the commercial potential of inflight connectivity through sponsorships, advertising, retail and content.

Dividing OneFi's wealth of features into themed bundles adds the flexibility and personalisation that airlines need to build a customised digital onboard experience for passengers.

Passenger expectations will continue to evolve and staying on top of these changing needs will require diligence. One thing that airlines can bank on, though, is that passengers' reliance upon Wi-Fi – and everything these connections deliver – will only increase.

Failing to supply this is not an option. Passenger satisfaction – and your bottom line – depends upon it.

That's putting
it mildly.



Methodology

Research was conducted by Censuswide on behalf of Inmarsat in August – September 2022.

The research surveyed a statistically significant sample of 11,231 respondents – who said they had travelled by air in the past year – in 10 countries worldwide.

This was made up of:

1507 respondents in the UK	673 respondents in Brazil	1259 respondents in Germany	507 respondents in UAE	1004 respondents in Saudi Arabia
505 respondents in South Korea	1511 respondents in India	1002 respondents in Australia	2261 respondents in USA	1001 respondents in Singapore

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