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APAC Passenger Experience Survey 2022

What we expect in

~~APAC PASSENGER EXPERIENCE SURVEY~~ 2022

and beyond

Our latest annual deep dive into global passenger attitudes towards their experience in the air has highlighted a number of trends. Some are new, while others were in motion before the pandemic and have since accelerated.

There is good news coming out of APAC. Passenger confidence is returning for the vast majority of passengers, a trend we're seeing worldwide too, after years of low confidence during the pandemic.

In fact, three-quarters of those surveyed across APAC (over 4,000 flyers) feel confident flying today. This time last year, that number was just 6% in the region – showing enormous growth in the year since.

What's more, inflight Wi-Fi is a catalyst for returning passenger confidence across the region. A further three-quarters of APAC passengers say it's important to be connected during a flight – doubling from just 39% last year. That's no idle claim either, as 78% chose to connect when inflight Wi-Fi was available to them.

It's clear from these findings that connectivity is crucial. 83% of those surveyed said staying connected during a flight enhances the experience so much that they would rebook with that same airline in the future. This number rises to 92% in India and 89% in South Korea – two countries that appear to be at the forefront of the inflight digital experience.

74%

of APAC passengers say it's important to be connected during a flight – last year this figure stood at 39%

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People are confident in air travel again

Great to be back onboard!

Of those surveyed across APAC, 75% are confident about flying again. Last year, this figure stood at just 6%. This is a remarkable turnaround and testament to the resilience of the aviation industry.
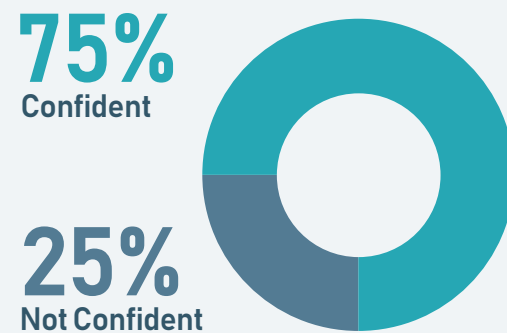
The one outlier is South Korea. South Korean flyers recorded confidence levels of just 53% – while substantially lower than the global outlook, this can probably be explained with some wider context. Negative test requirements only stopped in September* and there is still a requirement to wear masks in public spaces. As such, it's unsurprising that people are generally still concerned about travelling compared to countries where rules have been more significantly relaxed.

The good news, however, is that passenger confidence in Australia, Singapore and India chimes with the wider global outlook, with 3 in 4 passengers feeling confident.

And when you consider how hard the APAC region was hit – and how it has been slower to return to 'normal' post-pandemic than elsewhere – this is encouraging news.

APAC passengers' confidence

75% Confident

25% Not Confident

Passenger confidence by region

88% India
79% Singapore
79% Australia
53% South Korea

75% of those surveyed across APAC are confident about flying again

*https://covidcontrols.co/restrictions/south-korea

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When travelling, APAC passengers want *fully expect* to be connected

The territories within APAC might be diverse, but its flyers are united in one common expectation: they want to be connected when flying.

Demand for inflight Wi-Fi was abundant before the pandemic, as APAC passengers have long been digital early adopters. This is demonstrated by the fact that 95% of passengers were already using their own personal devices last year, and this level of usage has remained steady. The desire to be connected is only growing, and inflight Wi-Fi is now less a want and more a need.

Of those surveyed, 74% of APAC passengers say it's important to be connected during a flight. This time last year this figure stood at 39% – almost doubling in 2022 in a sharp demonstration of how staying connected is growing in importance. What's more, 78% have connected to inflight broadband when it's been available on a flight, showing they are living up to their 'early adopter' status.

95%

of passengers were already using their own personal devices while in the cabin last year

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We've embraced the hybrid passenger

Some of us: business
Others: leisure
Lots of us: both

When in the sky, 96% of APAC passengers use their own personal devices, be that for work, entertainment, or keeping up with their lives on the ground.

58% of APAC flyers prefer to use their own personal devices when they're accessing inflight entertainment.
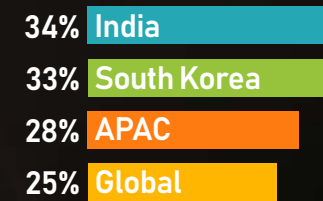
And here's another fascinating takeaway: 45% of Indian passengers would pay extra for exclusive inflight content. Overall, Indian respondents were more likely to make use of Wi-Fi for all tasks.

More than a third of APAC passengers also want to work while in the air – 36% in fact. This climbs to 46% in India and 43% in Singapore – significantly more than the global average of 35%. This makes robust and consistent connectivity a must.

This blurring of work and leisure travel is another global trend that appears particularly pronounced in the region, creating a significant commercial opportunity for airlines.

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

Unlimited downloads

34% India
33% South Korea
28% APAC
25% Global

Unlimited social media usage

33% India
30% Global
29% South Korea
28% APAC

To access exclusive inflight entertainment content

45% India
34% Global
32% APAC
29% South Korea

Early access to customs

34% India
26% APAC
25% Global
21% South Korea

Q: What do APAC passengers use their devices for?

Entertainment

52% South Korea
52% India
50% Australia
49% Singapore

Work

46% India
43% Singapore
28% Australia
27% South Korea

Using the airline app

46% India
39% Singapore
33% Australia
24% South Korea

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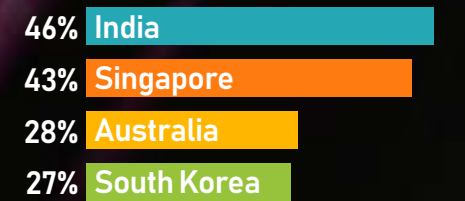
Inflight Wi-Fi = Good
Free inflight Wi-Fi =
Now we're talking

How can passenger experience be enhanced?

essential

APAC passengers have clearly deemed inflight Wi-Fi important. So the fact that 88% of respondents say they have experienced problems when connecting is a real frustration – and another opportunity for forward-thinking airlines.

The number one frustration across the region is slow and unstable connectivity – for 40% of passengers.

However, there are other factors preventing passengers from connecting in the first place. Cost is the primary issue, as 80% of APAC passengers think inflight Wi-Fi should be free during long-haul flights, while half (49%) think it should also be free for short-haul journeys.

Australian and Singaporean passengers are particularly affected by cost – 56% and 52% of flyers respectively won't connect if they believe the price is too high.

Passengers from South Korea and Singapore are more irritated than others by slow connections. Indeed the APAC region finds slow and unstable Wi-Fi connections more exasperating than the global figure – 49% in APAC compared to 45% globally.

So while these frustrations are less than ideal, they do present an opportunity. The airlines that quickly and consistently provide passengers with the services they want stand to make commercial gains.

What would stop you connecting?

It costs too much money to connect

56% Australia

52% Singapore

33% India

26% South Korea

If the connection is too slow

56% South Korea

53% Singapore

45% Australia

44% India

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What we like and what we don't like

~~Securing the future of passenger experience~~

Such is the appetite for inflight Wi-Fi across the region that 85% of APAC passengers are willing to do more – such as trade in drinks, watch adverts or pay higher fares – in order to be connected in the sky.

Over a third say they would watch advertisements (36%) if it means they get a quality and consistent Wi-Fi service. Just under a third (32%) would trade alcoholic drinks to get connected, while 30% are willing to spend loyalty points to ensure access.
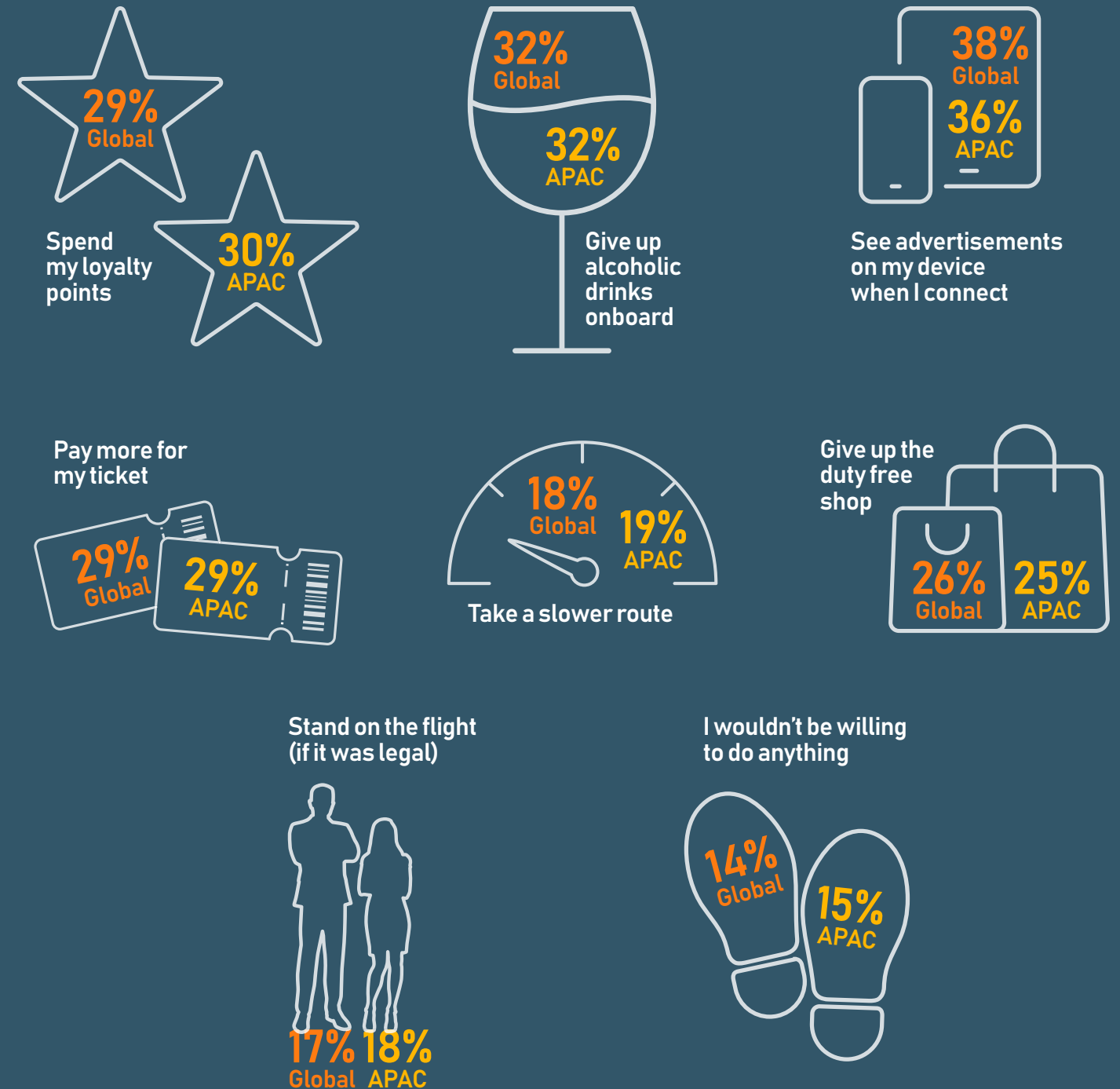
Indian passengers are particularly keen to keep their always-on lives connected whilst in the cabin. Testament to this is the fact that almost one in three (29%) would give up their seats and stand

– if it were legal – to obtain that all-important connection (compared to the APAC average of 18%). While not advised, this serves to emphasise just how much they value connectivity.

Almost half of Indian flyers (44%) would pay more for their ticket if it guaranteed an internet connection – again, well above the APAC average of 29%. Half of Indian passengers also want destination information while they fly (compared to the APAC average of 35%).

All of this presents a clear opportunity for airlines to delight customers in their seats, at 30,000 feet – and reap the commercial rewards of doing so.

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

29% Global
30% APAC
Spend my loyalty points

32% Global
32% APAC
Give up alcoholic drinks onboard

38% Global
36% APAC
See advertisements on my device when I connect

Pay more for my ticket
29% Global
29% APAC

18% Global
19% APAC
Take a slower route

Give up the duty free shop
26% Global
25% APAC

Stand on the flight (if it was legal)
17% Global **18% APAC**

I wouldn't be willing to do anything
14% Global
15% APAC

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

If further proof was needed to demonstrate the enthusiasm for and importance of inflight Wi-Fi among APAC passengers, consider this: 83% of those surveyed said that they are more likely to rebook with an airline that provides quality inflight Wi-Fi.

Connectivity is fast-becoming a deal breaker – especially in India and South Korea where 92% and 89% respectively say they'll book with the same airline if they enjoy quality Wi-Fi access.

Q: Would you rebook with an airline if quality Wi-Fi was available?

83%
Yes

8%
No

9%
Not sure
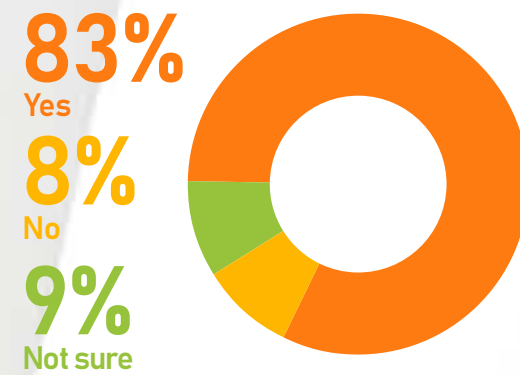
83%
of passengers said they are more likely to rebook with an airline that provides quality inflight Wi-Fi

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"It's been great to see so many passengers across APAC returning to the skies this year. Airlines have done a fantastic job in reassuring passengers that air travel is safe again – and this has been reflected in soaring passenger confidence.

Much like the global trends, the role of inflight Wi-Fi here is key in passengers' experience in the skies. Connectivity offers the opportunity to be entertained, catch up on work, or keep in touch with loved ones on the ground – so it's no wonder it's become more than a nice to have this year.

Almost three quarters of APAC passengers say being connected during a flight is important to them – while more than 4 in 5 say they'd rebook with an airline that offered good Wi-Fi. I'm not surprised by this, as the APAC region has long been a digitally-advanced hotspot. Clearly, this shows no sign of slowing down anytime soon – in fact, I think this demand for connectivity will only grow.

All of this presents airlines with an opportunity to use connectivity to enhance the passenger experience beyond the ordinary. Not only will this boost retention and loyalty among their passengers – but it can also unlock a whole host of commercial opportunities to support their ongoing recovery, and future-proof the business."

David Coiley,
Asia Pacific Regional Vice President – Inmarsat Aviation

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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

1001
respondents
in Singapore

2261
respondents
in USA

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