

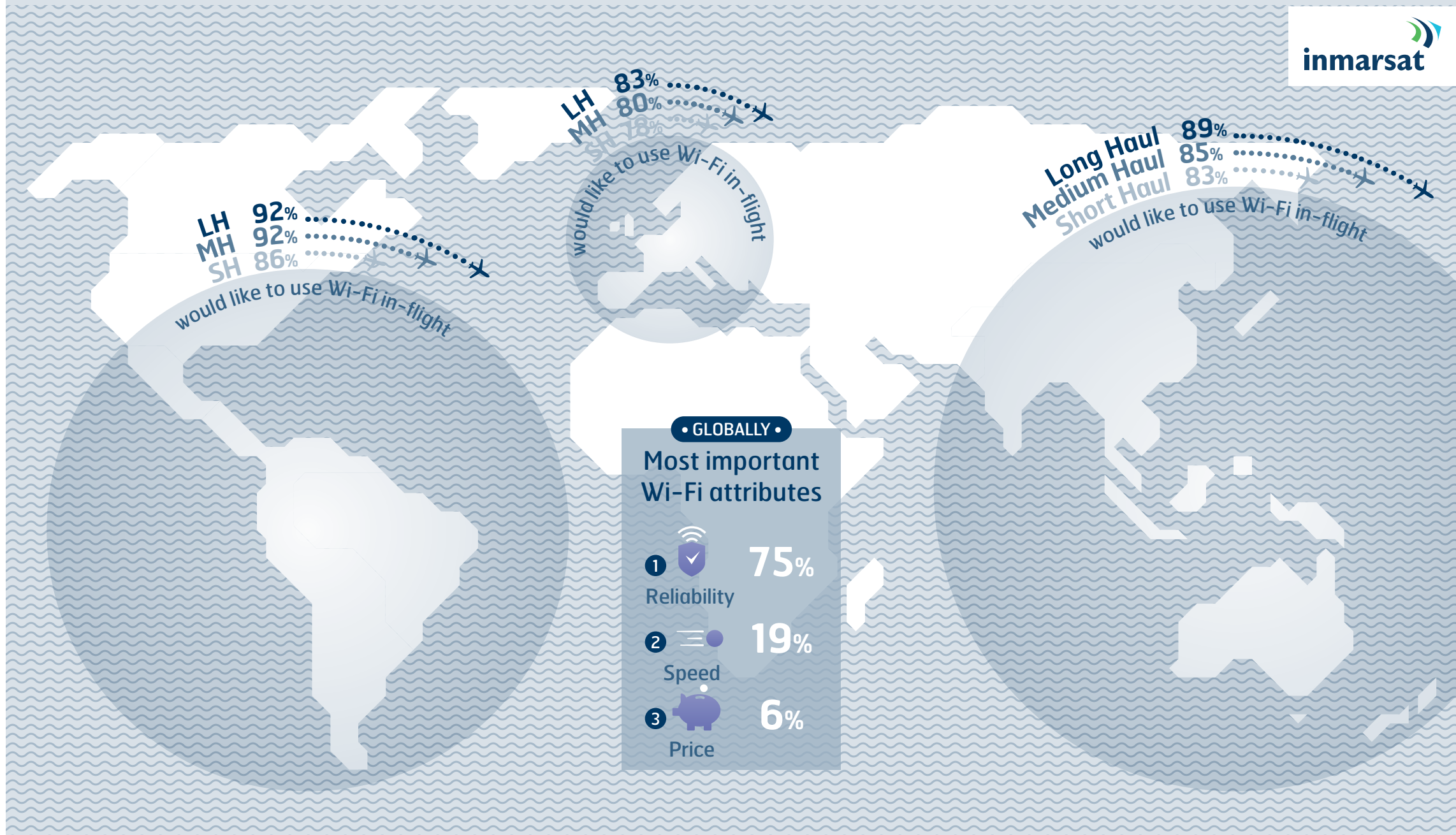
Reliable CONNECTED AVIATION MAKING IT POSSIBLE TODAY



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IN-FLIGHT WI-FI RELIABILITY: BIGGEST INHIBITOR TO PASSENGER ADOPTION, UNTIL TODAY



LATAM

WILLINGNESS TO PAY

64% On any flight length in LATAM

TOP 3 ACTIVITIES on in-flight Wi-Fi

- 1 Streaming video
- 2 Social networks
- 3 Travel apps / sites

EUROPE

WILLINGNESS TO PAY

69% On any flight length in EUROPE

TOP 3 ACTIVITIES on in-flight Wi-Fi

- 1 Web browsing
- 2 Emails
- 3 Social networks

APAC

WILLINGNESS TO PAY

67% On any flight length in APAC

TOP 3 ACTIVITIES on in-flight Wi-Fi

- 1 Travel apps / sites
- 2 Airline's app / site
- 3 Web browsing

From proprietary 2016 Inmarsat/GfK research

Sample of over 9,000 passengers from 27 countries who have flown in the past 12 months, the largest known survey of its kind.

On any flight length, the majority of passengers prefer to have the option of

 **54%** in-flight Wi-Fi

over

16%  IFE

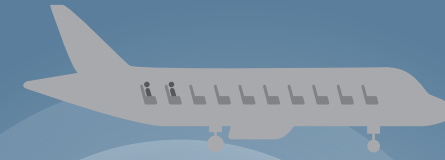
19% meal

7% duty free

34% bring 3 devices on board



and all are willing to pay for in-flight Wi-Fi



83%

of passengers prefer to choose an airline that offers in-flight Wi-Fi



78%

of passengers expect Wi-Fi to replace traditional IFE in the next 5-10 years



57% don't have the option of in-flight Wi-Fi

92% of them would like to use it

PASSENGER PERSONAS



CORE SEGMENTS

Core Communicator



They want to do only **3** activities, mainly focused on communications and web browsing

Family Flyers



79% have flown with kids who have their own smartphones

Corporate Connector



71% will pay for faster Wi-Fi

ADDITIONAL SEGMENTS

LATAM



Entertainment Seeker



78% don't need IFE if they can access entertainment content via Wi-Fi

EUROPE



Connectivity Addict



43% browse the web on their smartphone so often per day they lose track

APAC



Content Curator



75% prefer to consume their own content