

IMDC Inflight Technologies

Market Outlook 2012



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1.0	Airline Market Background and Consumer Technology	01
2.0	Inflight Entertainment Hardware Market Overview and Forecast	14
3.0	Content Market, Structure and Practices	31
4.0	Passenger Connectivity Developments and Forecast	46
5.0	The Future for Inflight Technologies	68

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1.0 Airline Market Background and Consumer Technology

It is the airline industry that ultimately dictates the fortunes of inflight technologies, and as such the fortunes of the airline industry are hugely important. The unique constraints and dynamics of the airline industry ultimately govern the evolution of IFEC. The macroeconomic dynamic of the airline industry has changed following the economic collapse triggered by the banking crisis. The ripple effects are determining the shape and size of today's IFEC market, hence, we examine this.

2.0 Inflight Entertainment Hardware Market Overview and Forecast

The relatively high cost and infrequent retrofits traditionally make investing in IFE Hardware a decision to be made with great care. Close analysis of the current suppliers and would-be suppliers in the IFE Hardware space suggests that too much emphasis is being put on the technologies employed to deliver IFE. Ultimately, IFE has a choice of: architecture, which can be seat or server centric; network, which can be wired or wireless (each with different technologies); and the display and interface, which can include passenger own devices. IMDC evaluate the suitability of each of these three aspects relative to an individual airline when evaluating any particular supplier.

3.0 Content Market, Structure and Practices

The entertainment, content and media industries today are in a state of change. It is not just the technologies but the business models that are changing, and the implications for non-theatrical public performance markets including inflight are significant. Changes from both the suppliers and consumers of inflight content make managing the process challenging and complex. The challenge is magnified by pressures on the airline industry as a whole and by the technical capabilities of inflight technologies installed on the airline's fleet. It is in airline's interests' to be creative in their content selection process.

4.0 Passenger Connectivity Developments and Forecast

Passenger connectivity is a relative new service that is yet to provide airlines with a straightforward choice despite hundreds of aircraft being equipped with either cellular or WiFi based connectivity for passenger use over recent years. This is a confusing area for airlines where true passenger demand and benefit are not yet quantified. New technologies are on the horizon and airlines are struggling to decide whether to wait for these, fit the best available now, or choose an interim solution.

5.0 The Future for Inflight Technologies

Recent and future technologies are changing the way we have to look and inflight entertainment and connectivity. The boundaries between hardware, content, and connectivity are blurring as each becomes interrelated. In addition to the changes within inflight technology, the sector is influenced more than ever with consumer technology, the connected lifestyle, and changes in content consumption and production. Inflight technologies are now relevant to an even greater part of the airline service and to consumer trends on the ground.



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