

Moment global study finds 70 percent of airlines now offer IFC

The Inflight Connectivity Benchmark

A data-driven analysis of global connectivity deployment, pricing models, and satellite providers across the world's airlines



Moment releases Inflight Connectivity Benchmark 2025 report

[Moment](#) has released the [Inflight Connectivity Benchmark 2025](#), a comprehensive data-driven analysis of connectivity deployment, pricing structures and satellite provider dynamics. The report analyzes 106 airlines worldwide, covering connectivity deployment, pricing models, and technology suppliers across Europe, the Americas, Asia-Pacific and the Middle East & Africa.

Traditional airlines eager to be at the forefront

In a world where 80 percent of passengers consider inflight Wi-Fi essential to their travel experience ([Viasat survey 2024](#)), despite models that vary, airlines are shifting from asking whether to provide connectivity to determining how to strategically deliver it. Moment's report reveals a sector at an inflection point. Connectivity is no longer an optional add-on but a core service defining the passenger journey. The industry has entered an era where connectivity must align with brand identity, fleet realities, and commercial ambitions.

According to the report, seven out of 10 airlines now provide inflight connectivity, with adoption strongly driven by legacy carriers. Depending on the airlines' business model, the approach to service tends to differ as 89 percent of legacy airlines are equipped with onboard Wi-Fi while 57 percent of

budget airlines are not. This disparity underscores the evolution of IFC from a premium differentiator to a baseline operational expectation.

Freemium models dominate the global landscape

The report highlights that freemium access has become the leading model, adopted by 58 percent of connected airlines globally. This approach blends free basic services, typically messaging, with paid access for browsing or streaming, enabling airlines to balance passenger satisfaction with ancillary revenue.

Fully free Wi-Fi remains rare globally (13 percent) but is growing rapidly as new LEO satellite providers accelerate affordability and performance. Loyalty-gated free access is emerging as a powerful acquisition tool, with several carriers offering complimentary Wi-Fi in exchange for frequent flyer free membership.

The pricing strategy highlights a fragmented landscape, but clear trends. Analysis of pricing models shows that airlines increasingly mix several strategies based on duration-based pricing (55 percent), usage-based pricing (54 percent), with data-based and route-based models gaining traction and subscription-based models expanding, especially in the Americas. Entry-level access, such as messaging, remains affordable at US\$3.73, while full-flight internet averages US\$19.70, allowing carriers to cater to both casual and high-value users. The presence of monthly and annual passes signals a shift toward subscription-style connectivity, reflecting the growing expectation of continuous digital access across journeys.

Regional dynamics reflect market maturity

The global IFC landscape shows significant regional disparities, with the Americas and Asia-Pacific leading in maturity and adoption. The Americas stand out for their uniquely inclusive approach, as budget carriers are the only ones worldwide to offer free Wi-Fi, while Asia-Pacific is rapidly advancing, with 19 percent of airlines providing fully free access.

Europe maintains near-universal coverage among legacy carriers and is poised for further acceleration through emerging technologies. In contrast, the Middle East & Africa remain in an early development phase, where limited deployment and wide gaps between carrier types highlight substantial room for growth.

“This evolving landscape signals a new era for aviation where inflight connectivity is becoming the backbone of a more intelligent, adaptable, and passenger-centric aviation ecosystem,” said Tanguy Morel, Co-Founder and CEO, Moment. “The industry has entered an era where connectivity must align with brand identity, fleet realities, and commercial ambitions. Airlines are no longer asking whether to offer Wi-Fi, they are defining what role connectivity plays in their service promise and revenue strategy.”