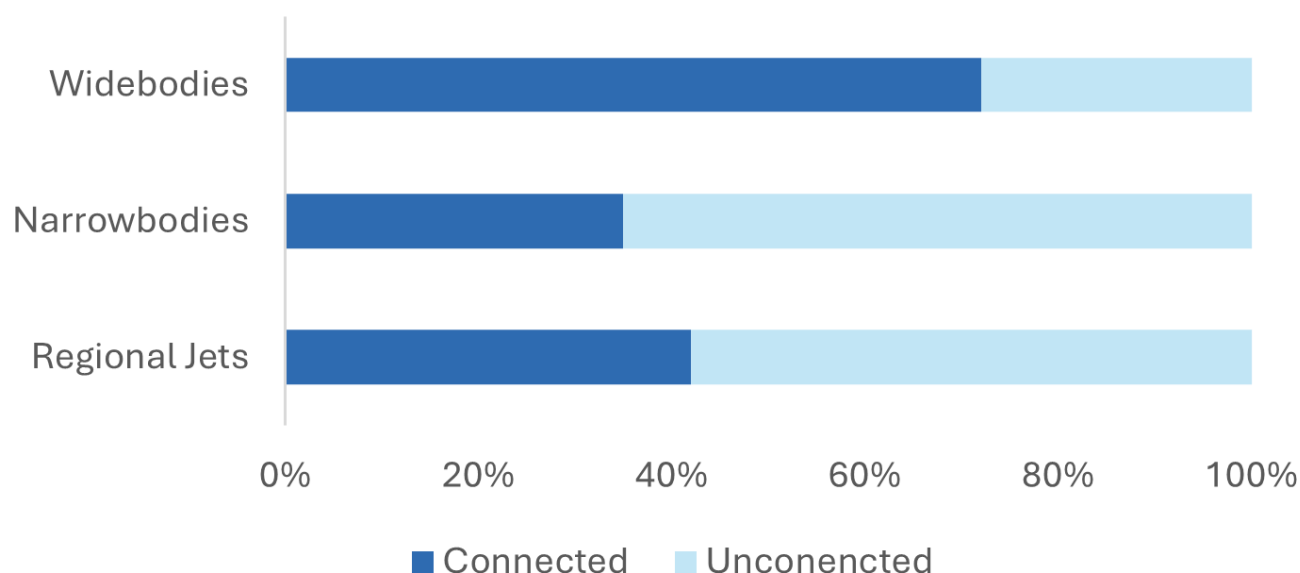


Valour Consultancy finds more than half of commercial fleets not yet offering Wi-Fi onboard



Valour Consultancy finds more than half of commercial fleet not yet connected

Valour Consultancy has released its [Quarterly IFEC Market Tracker](#), with findings indicating "a huge boom in upgrades as airlines transition from GEO-powered connectivity to LEO and multi-orbit services."

The company reported that the global connected fleet has risen relatively slowly over the years and sits just below 12,000 commercial aircraft at present—less than half of the active commercial fleet.

Valour Consultancy said narrowbody aircraft make up a huge slice of the addressable market, with approximately 64 percent of single aisle jets still without IFC, versus just 25 percent of widebodies.

Low cost carriers are also well represented in this segment.

"We know how they typically feel about the economics of IFC. The recent public debate between Ryanair's Michael O'Leary and SpaceX's Elon Musk highlighted the tension clearly – the additional weight of IFC hardware increases fuel consumption and the cost of data is too high, making it hard to generate a positive ROI," Valour Consultancy said.

However, the company encourages optimism about this sentiment changing, noting that passengers now expect connectivity to be available everywhere and the commercial rationale for IFC is steadily improving through declining data costs, maturing commercial models and the availability of lightweight, low-profile, easy-to-install hardware.

Valour Consultancy says these factors are gradually lowering barriers to adoption.

Geographically, the company's findings indicate that the largest fleets of unconnected airlines in the

world are where a significant proportion of addressable market sits.

China accounts for more than 4,400 commercial aircraft, yet only around 10 percent are currently connected. While the market presents regulatory and partnership complexities for Western vendors, recent developments — including China Southern’s selecting SES’s IFC solution for its new A350s and Spacesail’s launch of its “Thousand Sails” LEO network – indicate momentum is building. Beyond China, a staggering 60 percent of aircraft registered to carriers in the Asia Pacific region remain unconnected.