

Passenger Experience Survey 2023

Sky-high expectations
for in-flight connectivity



Welcome to a new era of air travel

The air travel market has changed over the last few years. Passengers are paying more for their tickets and, when they do board the plane, they want to continue working and playing online just as they do on the ground. Their expectations are incredibly high.

At the same time, airlines are having to rethink how they deliver their services — meeting heightened expectations while keeping costs under control.

It is clear that the passenger experience has never been more critical, as failing to meet these expectations could mean losing customers to competitors.

Our latest research has shown that in-flight connectivity is now key to a good passenger experience.

After all, passengers have access to free, always-on connectivity almost everywhere they go on the ground. Why should the hours spent in the air be different?

Of course, this raises a number of important questions:

- Is in-flight connectivity truly essential?
- Will passengers pay more to fly with those airlines that offer it?
- How are expectations changing more broadly?
- What further demands will emerge over the next few years?

This is a crucial moment. Understanding passengers' expectations and desires around in-flight Wi-Fi now could unlock incredible rewards for airlines in this new era. So, read on to hear from the passengers themselves.





"I want to stay connected, even in the air"

81%

A vast majority of passengers surveyed said that being able to connect is important to them, and this pattern is seen all over the world.

86%

of passengers surveyed have connected to in-flight Wi-Fi at least once over the past 12 months, up 7% from last year.

94%

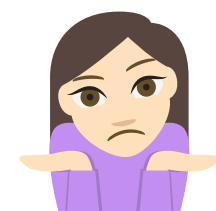
of Brazilian passengers surveyed say that in-flight connectivity is important to them.



“Why should I have to pay for Wi-Fi?” 🙄

It’s perhaps no surprise that almost half of passengers surveyed (47%) would be less likely to connect to in-flight Wi-Fi if it cost them money.

By charging for in-flight connectivity, airlines risk half their passengers feeling unsatisfied, and could also be missing out on key revenue generation opportunities.



"I can deal with ads,
but I can't stand
a slow connection" 🐢



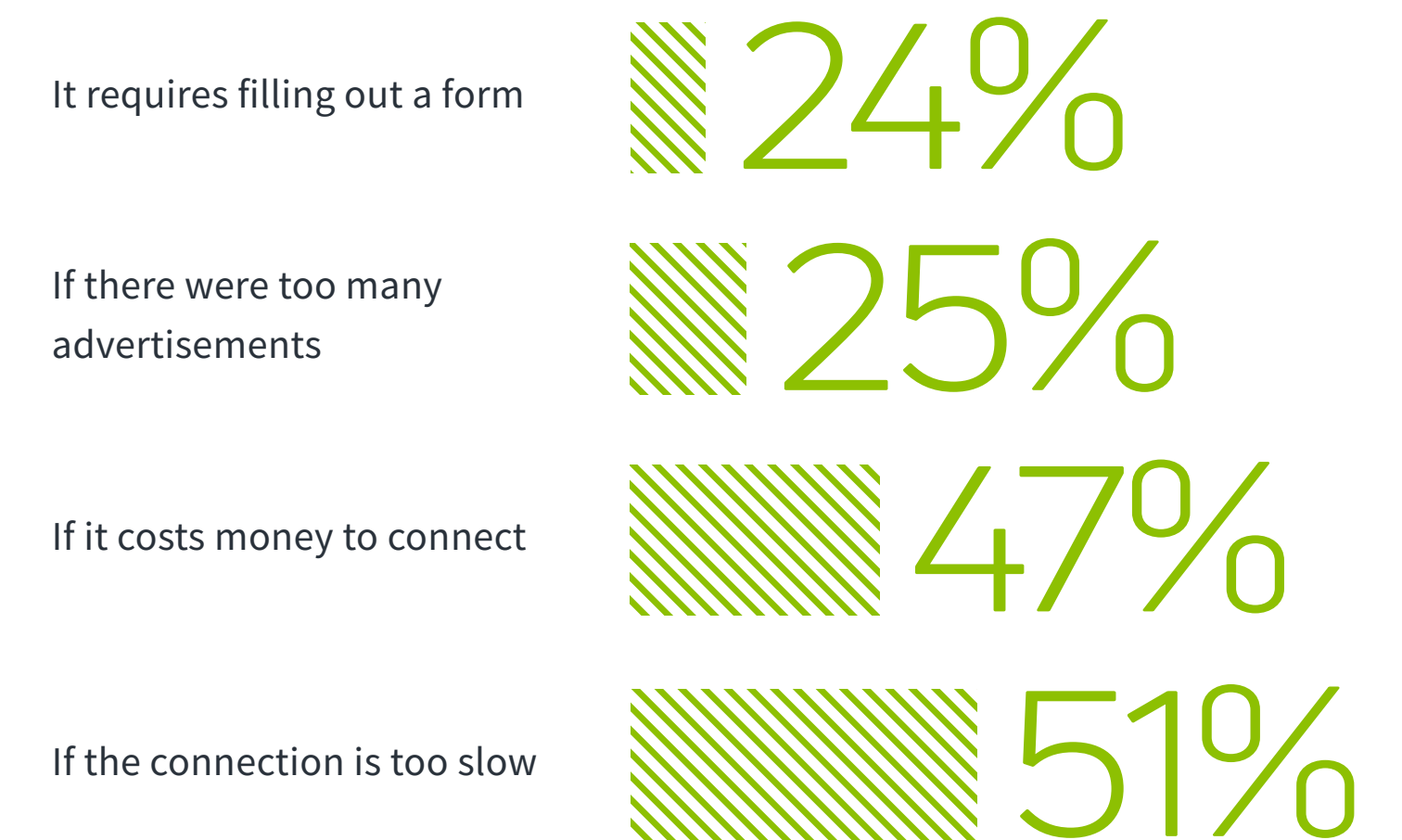
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Passengers may be keen to connect, but they will avoid sign up if the service isn't delivering. 51% of those surveyed say they'd be less likely to join onboard Wi-Fi if the connection was slow.

On top of this, a quarter of respondents would be less likely to sign up because of an abundance of advertisements, and 24% would avoid it if they were required to fill out a form.

Interestingly, this suggests passengers are much more likely to embrace ads than a slow connection.

What, if anything, would be the most likely factors to stop you from connecting to onboard Wi-Fi?





“Free in-flight Wi-Fi is more important than comfy seats” 👍



When passengers are choosing an airline, free Wi-Fi is the most influential factor besides ticket price, with 22% of respondents selecting this option.

In fact, it’s so important that 29% of passengers surveyed would pay an increased ticket price. Free Wi-Fi even beats out free food and drink, extra leg room, and lounge access as influencing their choices.

If you had to choose one way to improve your flight, at the cost of an increased ticket price, what difference would you most like to see?

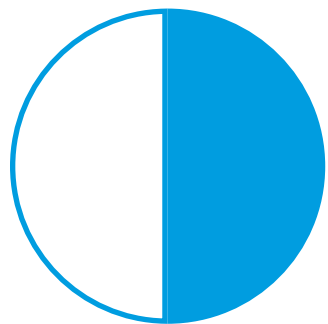
Free in-flight Wi-Fi	29%
More comfortable seating	28%
More choice of food and drink	13%
Better loyalty benefits	12%
More choice of in-flight entertainment	11%
I would never pay more than my ticket	6%



“The Wi-Fi was okay,
but the experience
could be better” 🛍️

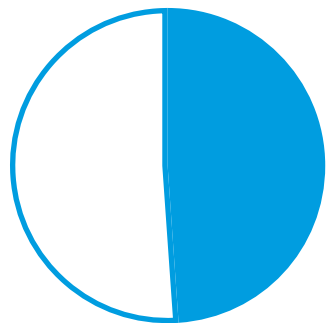
A majority of passengers surveyed (61%) are happy with how easy to use in-flight connectivity is, but there are a number of other factors that are less satisfactory — including their browsing experience.

If passengers continue to use increasingly data-heavy apps and websites, the experience could quickly fall apart. Airlines need to think about expanding capacity today and future-proofing their in-flight experience.



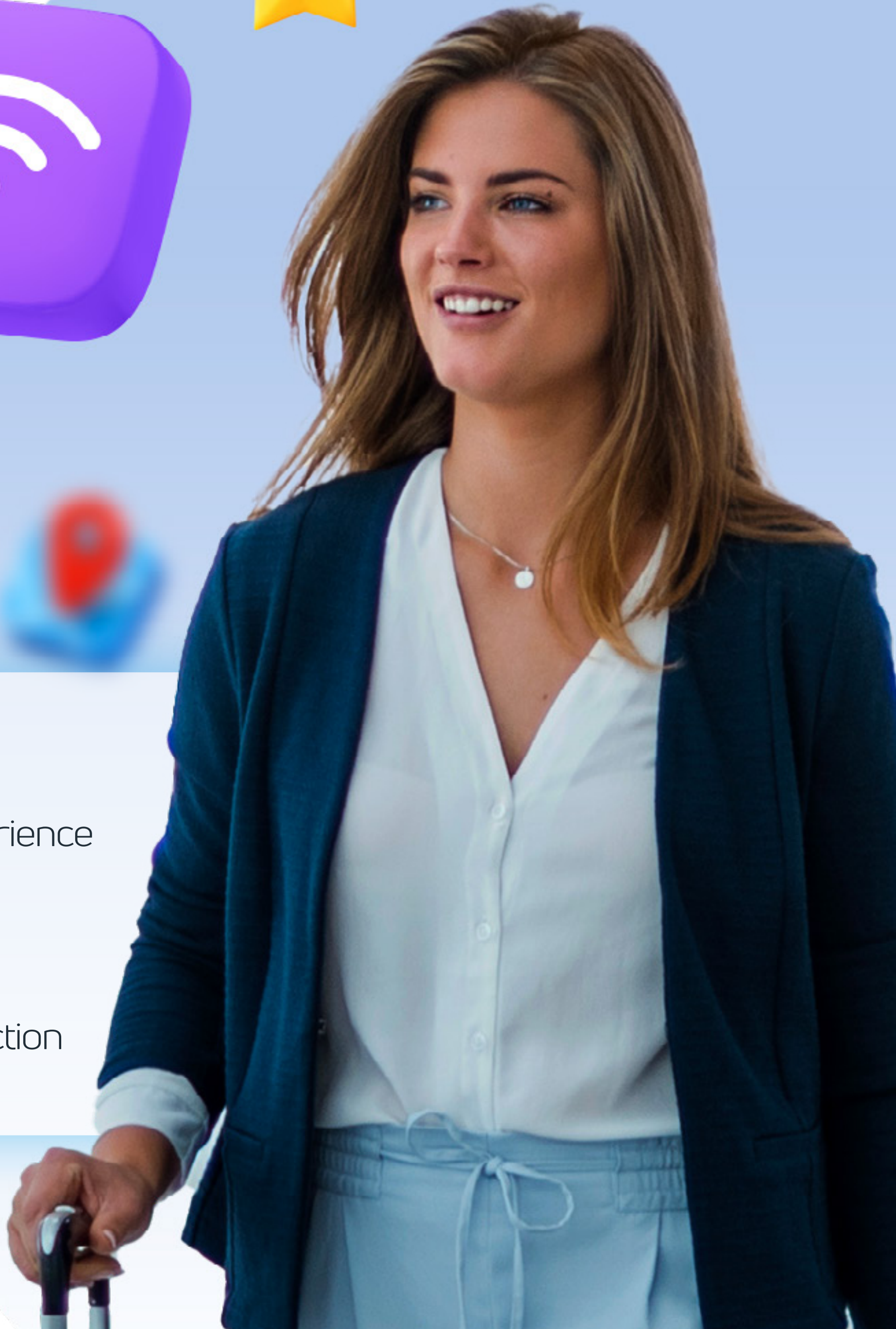
50%

were satisfied with
their browsing experience



49%

were satisfied with
the speed of connection





“Keep me connected and I’ll book with you again”

83% of passengers surveyed would rebook with an airline if they offered a quality Wi-Fi experience.

In the battle for repeat business and customer loyalty, there’s perhaps no better investment that airlines can make than in-flight connectivity.

Half of all passengers surveyed worldwide now expect free Wi-Fi, even on short-haul flights.

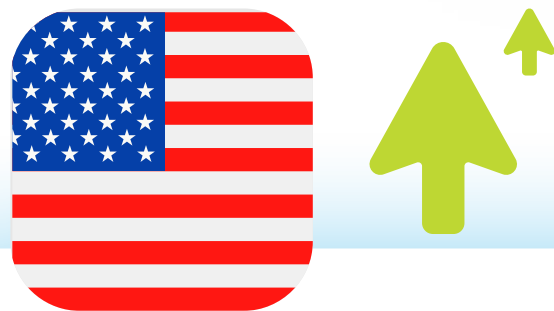
But there were some individual countries that reported big increases in demand.



The increase in demand for free Wi-Fi in Brazil is up 35% from 2022...



in India, demand increased by 42% since 2022...



...but the United States saw an even bigger increase: 50% up from 2022



"Just because it's free, doesn't mean I'll use it"

What use is free Wi-Fi if it isn't fast and reliable? It's clear from the research that connectivity can't be treated like a tick-box exercise. Having it merely 'available' is likely to squander investment.

52% of passengers surveyed said that to make the most of in-flight connectivity, airlines need to guarantee it is fast and reliable. 48% of passengers surveyed want this reassurance before they even step on the plane.

South Korean and American respondents also need this assurance of reliability more than they did last year, with both reporting rises from 47% to 53%.

But that's not all that customers expect.

39%

want to be able to make phone and video calls

54%

want charging ports for their personal devices

33%

want unlimited downloads

39%

want travel information as they fly

“Speed and reliability matter more than ever”

Passengers from almost all countries surveyed want to be confident in the speed and reliability of in-flight Wi-Fi. This desire has also increased in every country (apart from, notably, Germany) since our last survey.



From 47% in 2022
to 53% in 2023



From 45% in 2022
to 53% in 2023



Remained at 41%
since 2022

"The fun shouldn't have to stop after take off" 😁

Passengers want to remain as connected as possible to life on the ground.

That means being able to access social media, work emails and their favourite streaming services. Today, many passengers are also looking to access game streaming services, a relatively recent trend.

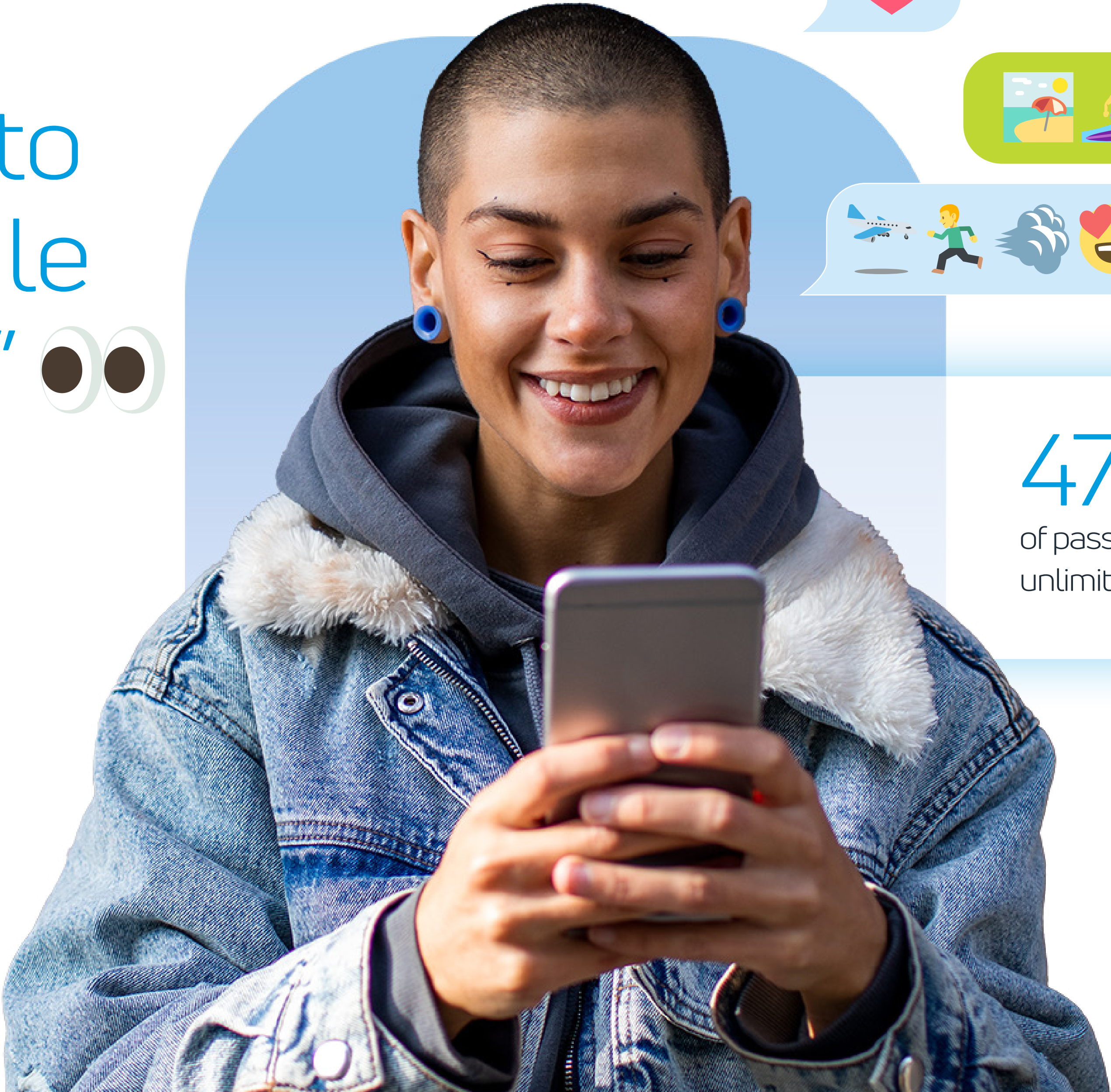
This desire for advanced connectivity hints at a future in which passengers could expect to live full, connected lives while onboard.



“I don’t want to miss out while I’m in the air” 🗨️

Most of us will have experienced the ‘fear of missing out’, or FOMO, at one point or another. And being in the air for several hours could exacerbate this unpleasant feeling.

While social media helps passengers stay plugged into conversations, it doesn’t give them everything. Airlines need to look beyond the bare minimum of connectivity.



47%

of passengers surveyed want unlimited social media access



"I want a real edge-of-my-seat experience"

The type of content that airlines offer can make a real difference to passengers.

Many people fear missing out on live sports, for example. They want to follow their team's exploits, even across states and countries – why wouldn't this also extend to those hours when they're 30,000 feet in the air?



25%

would pay to watch the NBA

45%

of respondents would pay for the FIFA World Cup



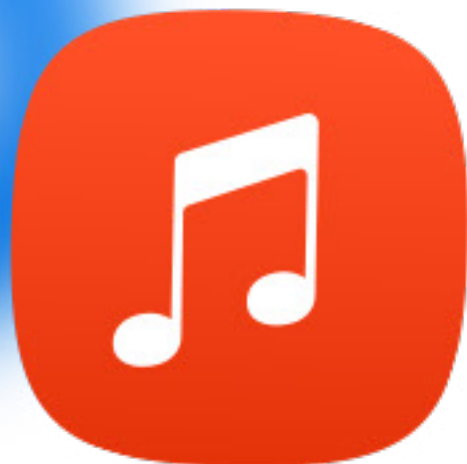
28%

would pay to watch the Olympics live



81%

of passengers surveyed would pay for access to live sports in flight



"I'll watch ads in exchange for Wi-Fi" 🙌

Passengers have come to expect advertisements in exchange for in-flight connectivity.

42%

of passengers surveyed are willing to see advertisements

A further
38%

expect to see advertisements

46%

of Indian passengers surveyed would be willing to see advertisements on their devices



36%

of South Korean passengers surveyed would be willing to see advertisements

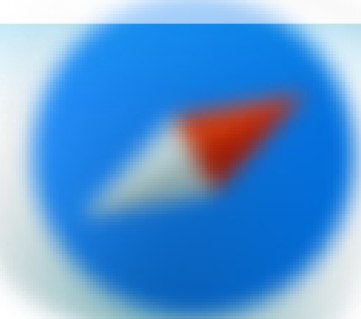
“I know airlines still need to make money” 

Though passengers prefer not to see ads, they are not unrealistic. They accept that airlines will need to recoup spend somehow.

Of course, with an innovative in-flight connectivity partner like Viasat, it's possible to balance revenue generation and the quality of what's delivered to passengers.



What would passengers be willing to do in order to access reliable connectivity?

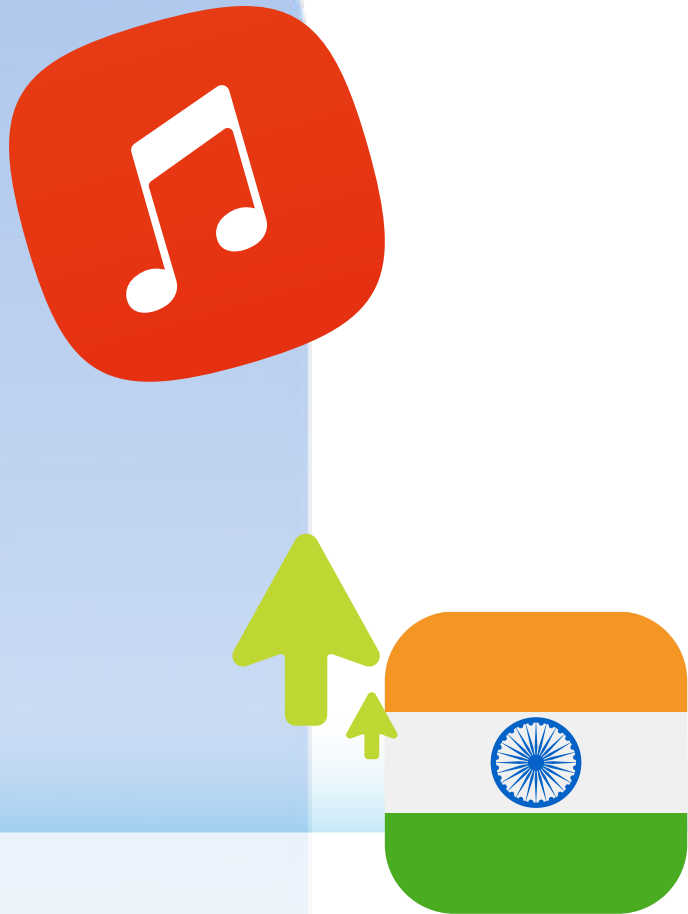




"I can accept a few restrictions if it means Wi-Fi is free"

88% of passengers surveyed expect restrictions when accessing free in-flight Wi-Fi. For example, 28% expect there to be capped data limits.

But there are major disparities here between countries with 95% of Indian passengers surveyed expecting some form of restricted service compared to 83% of British respondents.



95% of Indian passengers surveyed expect restricted service



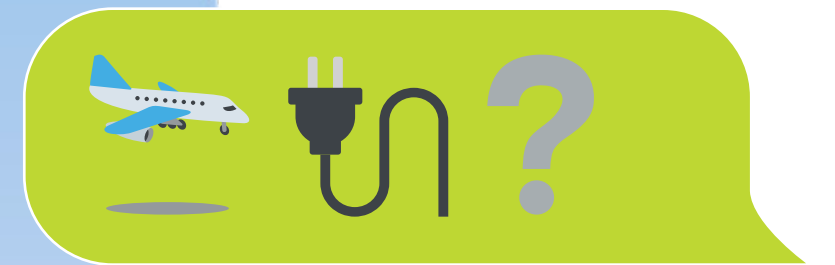
83% of UK passengers surveyed expect restricted service



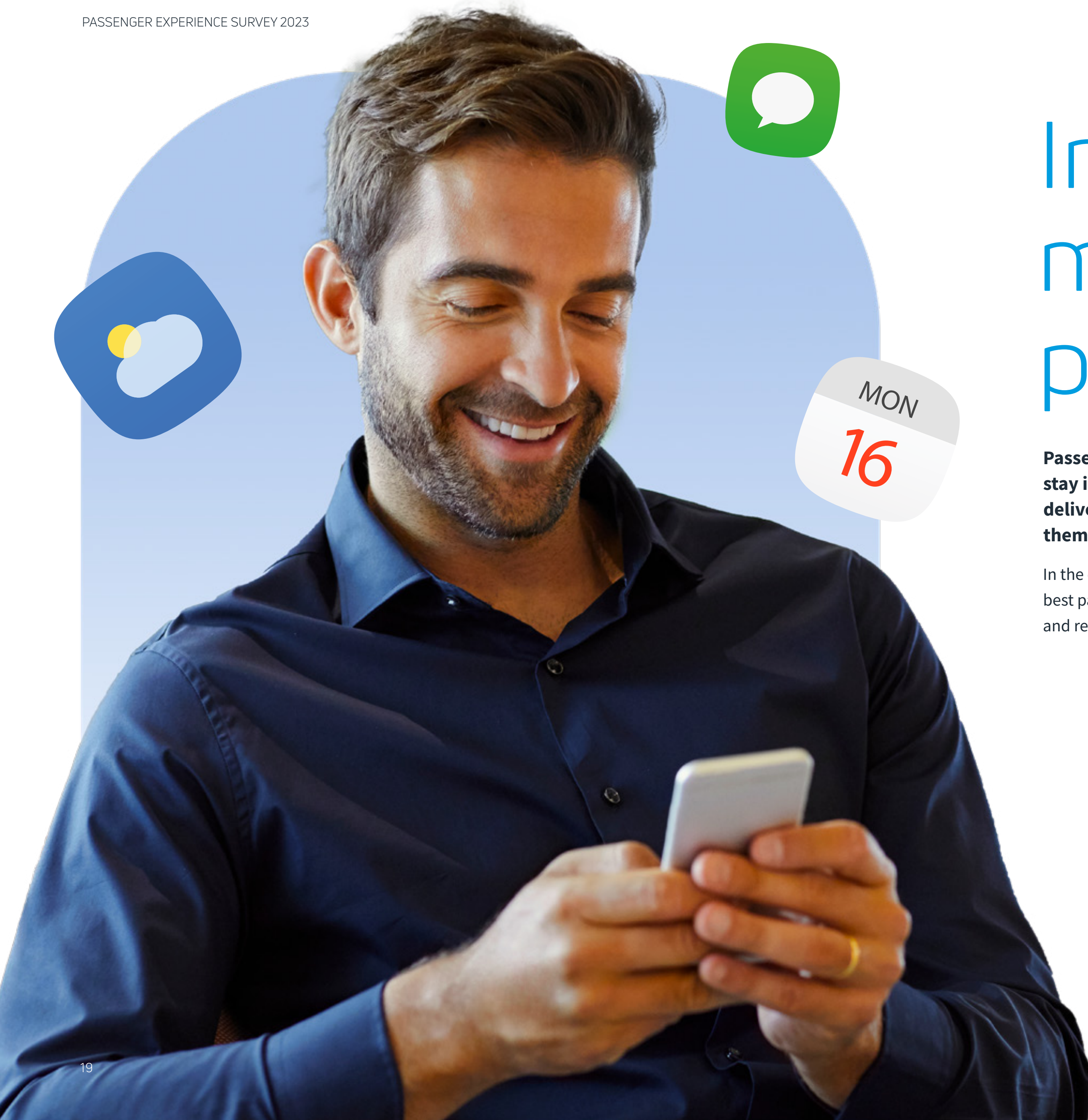
Expectations are high, but so are revenue opportunities

So, it's clear that passengers want Wi-Fi to be free and unrestricted at the point of use, but that doesn't have to mean turning connectivity into a cost centre, nor must it place a burden on passengers.

Airlines can leverage advertising, sponsorships, and loyalty programs as needed, as long as this elevates the overall passenger experience, rather than detracting from it. Returning investment to airlines, giving free access to passengers, and creating valuable opportunities for third party partners.



Gone are the days in which in-flight Wi-Fi was simply a 'nice to have'. Today, reliable connectivity is an essential to many passengers. Fast and free in-flight Wi-Fi is quickly becoming the same.



In-flight Wi-Fi can make or break the passenger experience

Passengers don't want to have to jump through hoops just to stay in touch with their lives on the ground. Any airline that can deliver on passengers' expectations for ease-of-use will likely find themselves ahead of the competition.

In the end, delivering the best in-flight connectivity could mean delivering the best passenger experience. And that could mean winning the battle for loyalty and repeat business.



Methodology

Research for this report was conducted by
Census wide on behalf of Viasat in July 2023.

The researchers surveyed a statistically representative
sample of 11,053 respondents, all of whom had flown
within the last year. This was made up of:

