



# Breaking new ground in passenger experience

The time to act on new emerging trends



In the past two years, everything has changed. The COVID-19 pandemic upended the aviation industry directly, of course, but it has also had far-reaching effects on how people live, work, and communicate with each other — notably by pushing more of everyday life online. The passengers who are returning to travel in 2022 have new behaviours, new priorities, and new expectations for their journeys, and many of these revolve around connectivity.

The time for airlines to respond to these changes is now. After two years of greatly diminished travel, and in the chaos that has accompanied the ramping up of normal operations, old brand loyalties no longer necessarily apply. Airlines face new competition for their formerly devoted flyers, and by the same token have opportunities to attract new customers themselves. Connectivity will be an essential selling point as airlines drive their businesses into the future.

This paper explores the emerging trends and drivers of change in passenger experience that led Inmarsat Aviation to invest in OneFi, its new customer experience platform.

Developed with input from passengers and airlines, OneFi is the passenger portal that has been built with connectivity at its heart, unifying inflight broadband with a range of contextually relevant connected services to maximise conversion. As a complete end-to-end solution from a single trusted partner, OneFi meets expectations for the digital passenger experience while also enabling airlines to maximise the value of inflight connectivity.

We've identified five opportunities for forward-thinking airlines to reinvent their passengers' onboard experience to reflect our new digital reality. Connectivity will play a critical role in this evolution.





# 1. Maximise personal device use

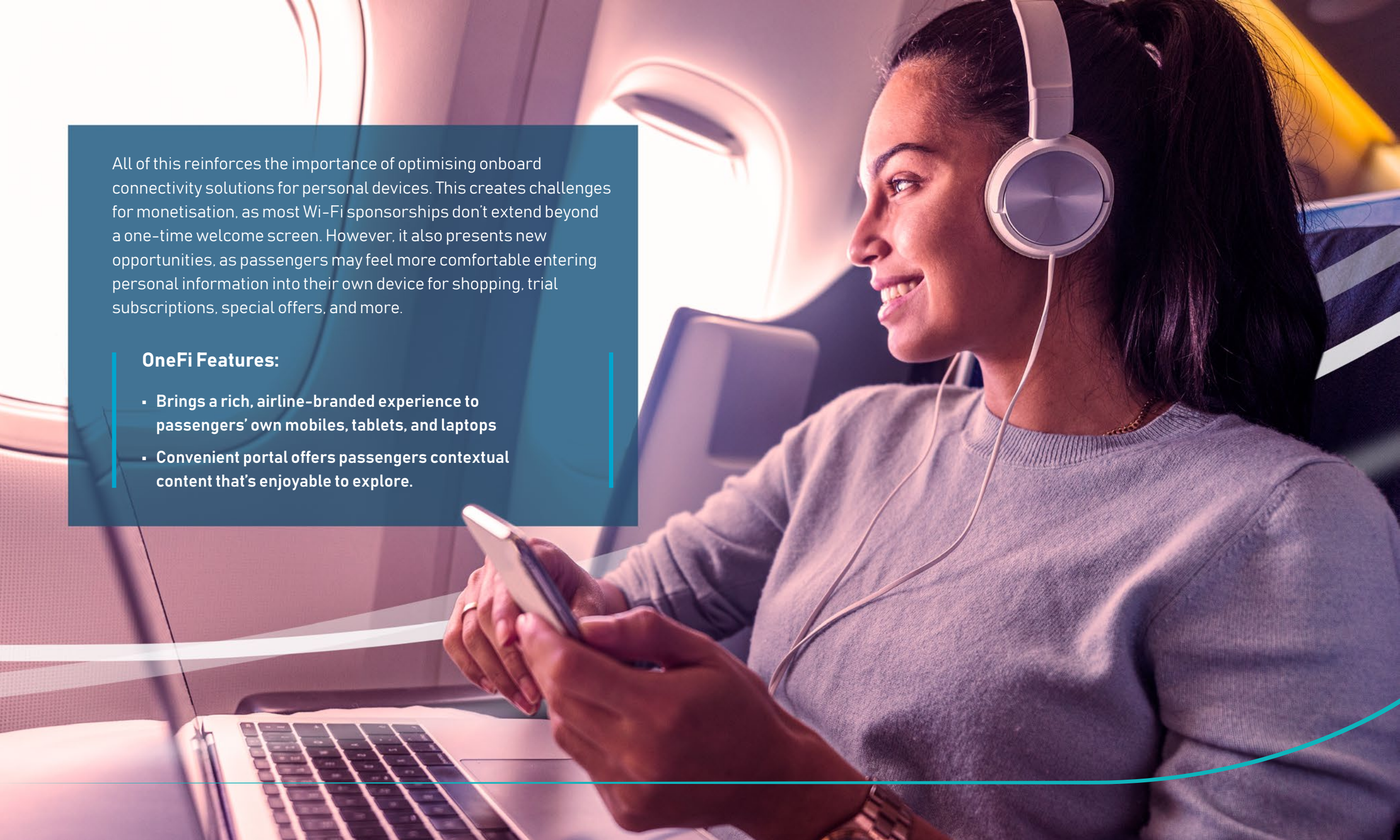
Even before the pandemic, airlines were seeing an increasing trend of passengers bringing their personal digital devices on board, rather than relying exclusively on seat-back entertainment. The pandemic has only accelerated this trend. Hygiene concerns are one reason for this: whatever additional cleaning measures an airline implements, many customers are simply more comfortable using a device that isn't shared with anyone else. [Qatar Airways](#) recognised this last year when it rolled out 100 per cent touch-free technology for its Oryx One inflight entertainment (IFE) system across its Airbus A350 fleet, allowing passengers to pair their personal electronic devices with their seat-back IFE by scanning a QR code displayed on the screen.

However, it's also the case that most of us are relying more on our connected personal devices than ever before — for work, entertainment, and managing the business of our daily lives.

According to the audience targeting company GWI, the pandemic edged online media ahead of offline. There are now more people who can be considered “high” or “heavy” users of online media than there are of offline media, and the gap is widening (The global media landscape: Analyzing how the pandemic has changed media habits, 2021).

Today, GWI reports, 97 per cent of internet users own a smartphone, and time spent on mobile devices continues to rise for all demographics. Notably, even when people were locked down at home, mobiles/tablets continued to climb in popularity for watching subscription services such as Netflix, which GWI says is “a telling sign that convenience is still important in viewing behaviours.” Personal devices with stored passwords and custom settings are simply a more convenient way to access many online services — including social media, chat, and streaming — than are shared devices.



A woman with dark hair tied back, wearing large white headphones and a grey sweater, is smiling and looking out of an airplane window. She is holding a smartphone in her hands. In the foreground, a laptop is open on a table. The background shows the interior of an airplane cabin with overhead lights and window shades.

All of this reinforces the importance of optimising onboard connectivity solutions for personal devices. This creates challenges for monetisation, as most Wi-Fi sponsorships don't extend beyond a one-time welcome screen. However, it also presents new opportunities, as passengers may feel more comfortable entering personal information into their own device for shopping, trial subscriptions, special offers, and more.

#### **OneFi Features:**

- Brings a rich, airline-branded experience to passengers' own mobiles, tablets, and laptops
- Convenient portal offers passengers contextual content that's enjoyable to explore.



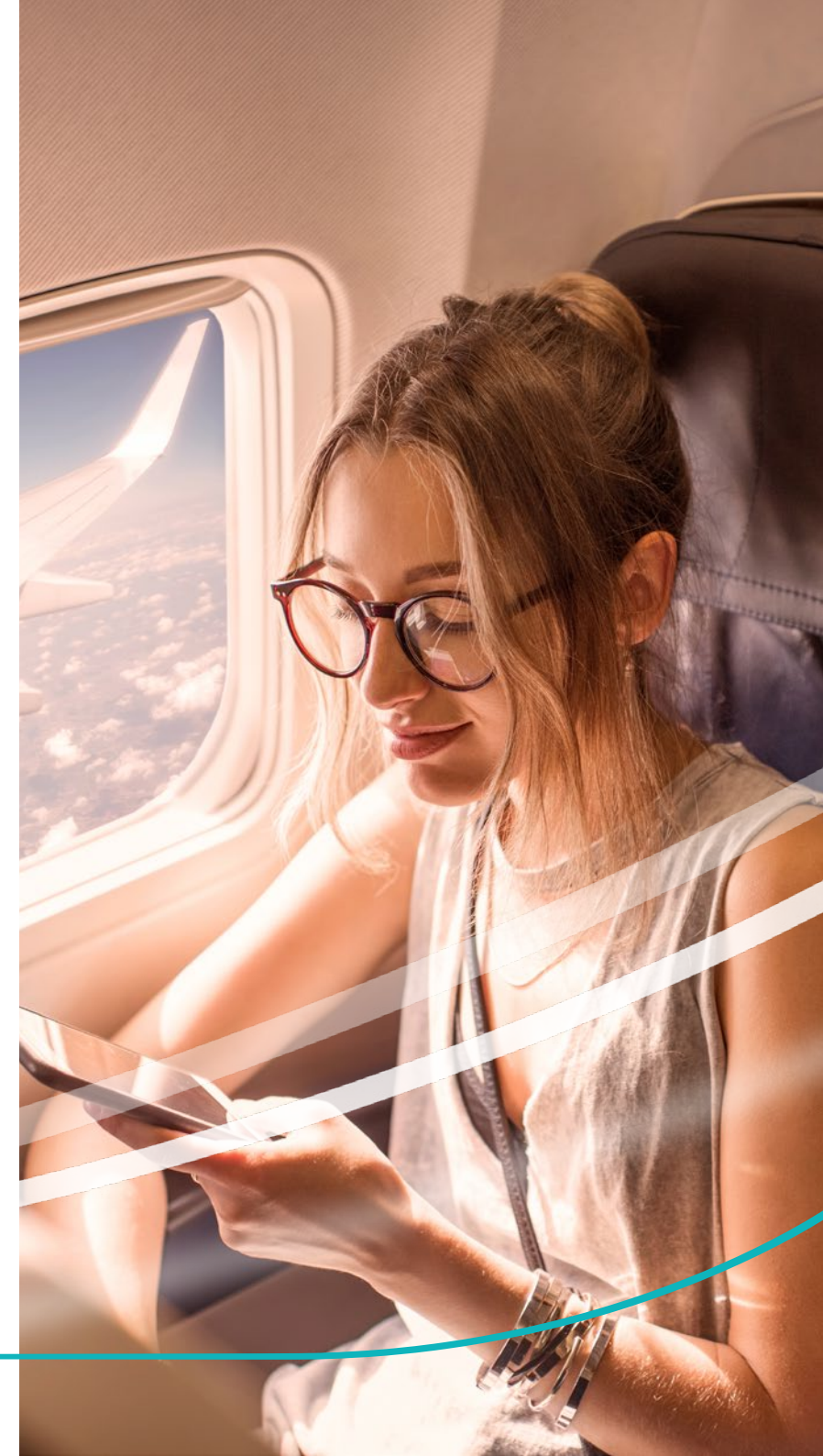
## 2. Put passengers in control

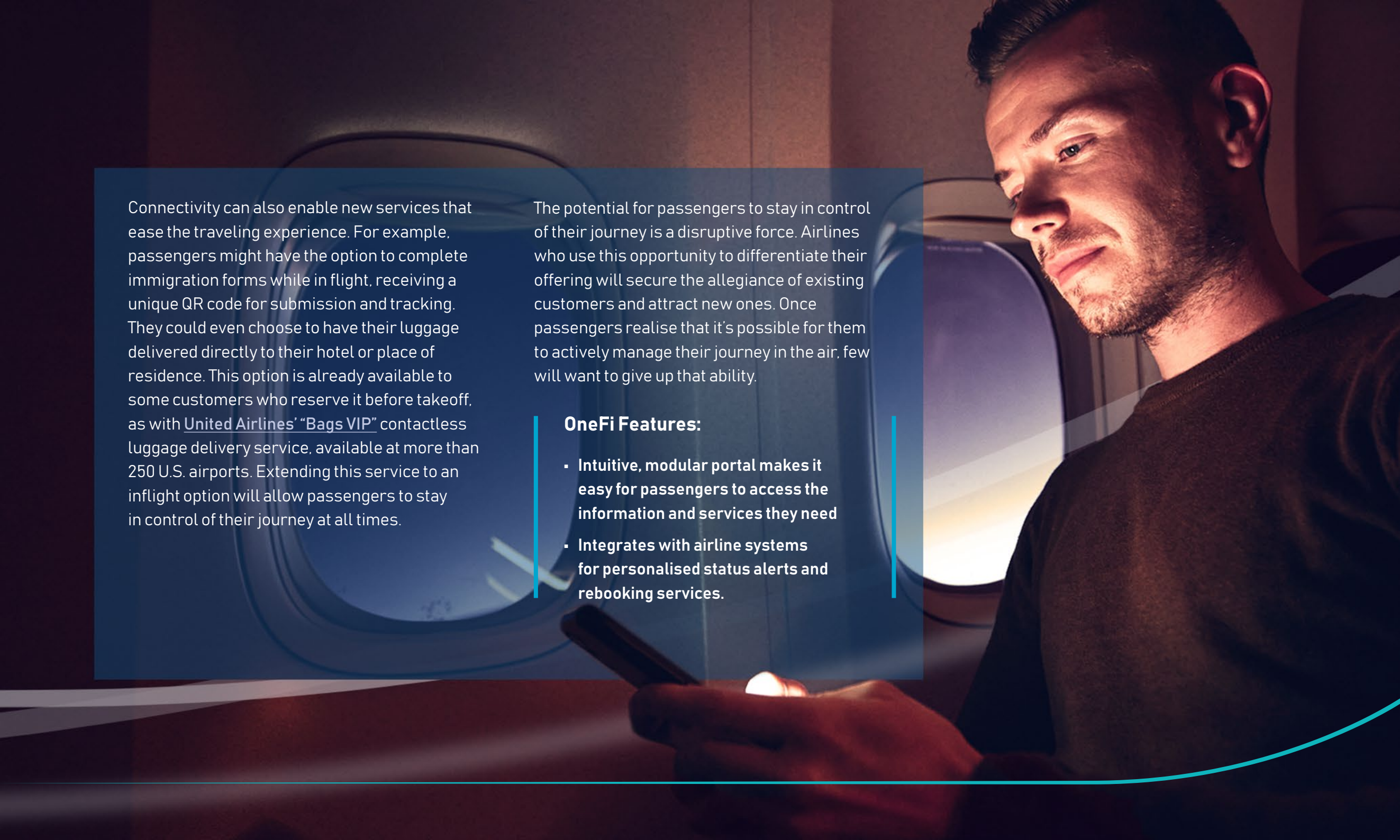
There's no question that the pandemic has made travel more stressful for many people. Rapidly changing travel restrictions and the prospect of quarantine have demolished the predictability that was previously associated with scheduled air travel, while pandemic-related staffing shortages have caused many acute disruptions. After two years of staying at home, many once-savvy travellers are returning to airports with a new sense of anxiety.

Because uncertainty is a key driver of stress, airlines have a new opportunity to win the loyalty of passengers by empowering them with information. Inmarsat's 2021 Passenger Confidence Tracker — completed by more than 10,000 respondents worldwide — found that digital technology enabled by connectivity can play a significant role in building passenger confidence. When it comes to the inflight experience, nearly a third of passengers said

real-time luggage tracking would significantly improve their confidence in travelling, while almost 40 per cent expressed a desire for destination status alerts and pre-landing immigration clearance.

Onboard connectivity presents multiple opportunities for giving passengers a sense of control. Moving maps give passengers more visibility into how their journey is progressing, while a connected portal can convey timely updates on what to expect when they arrive at the airport: things like which gate they'll be arriving at, how long they'll be standing in line at immigration, or where to find their connecting gate or baggage carousel. In the event of disruptions, they can use their airline's self-serve rebooking tools to confirm their new flights while still in the air, rather than anxiously waiting to do so back on the ground.





Connectivity can also enable new services that ease the traveling experience. For example, passengers might have the option to complete immigration forms while in flight, receiving a unique QR code for submission and tracking. They could even choose to have their luggage delivered directly to their hotel or place of residence. This option is already available to some customers who reserve it before takeoff, as with [United Airlines' "Bags VIP"](#) contactless luggage delivery service, available at more than 250 U.S. airports. Extending this service to an inflight option will allow passengers to stay in control of their journey at all times.

The potential for passengers to stay in control of their journey is a disruptive force. Airlines who use this opportunity to differentiate their offering will secure the allegiance of existing customers and attract new ones. Once passengers realise that it's possible for them to actively manage their journey in the air, few will want to give up that ability.

#### **OneFi Features:**

- **Intuitive, modular portal makes it easy for passengers to access the information and services they need**
- **Integrates with airline systems for personalised status alerts and rebooking services.**





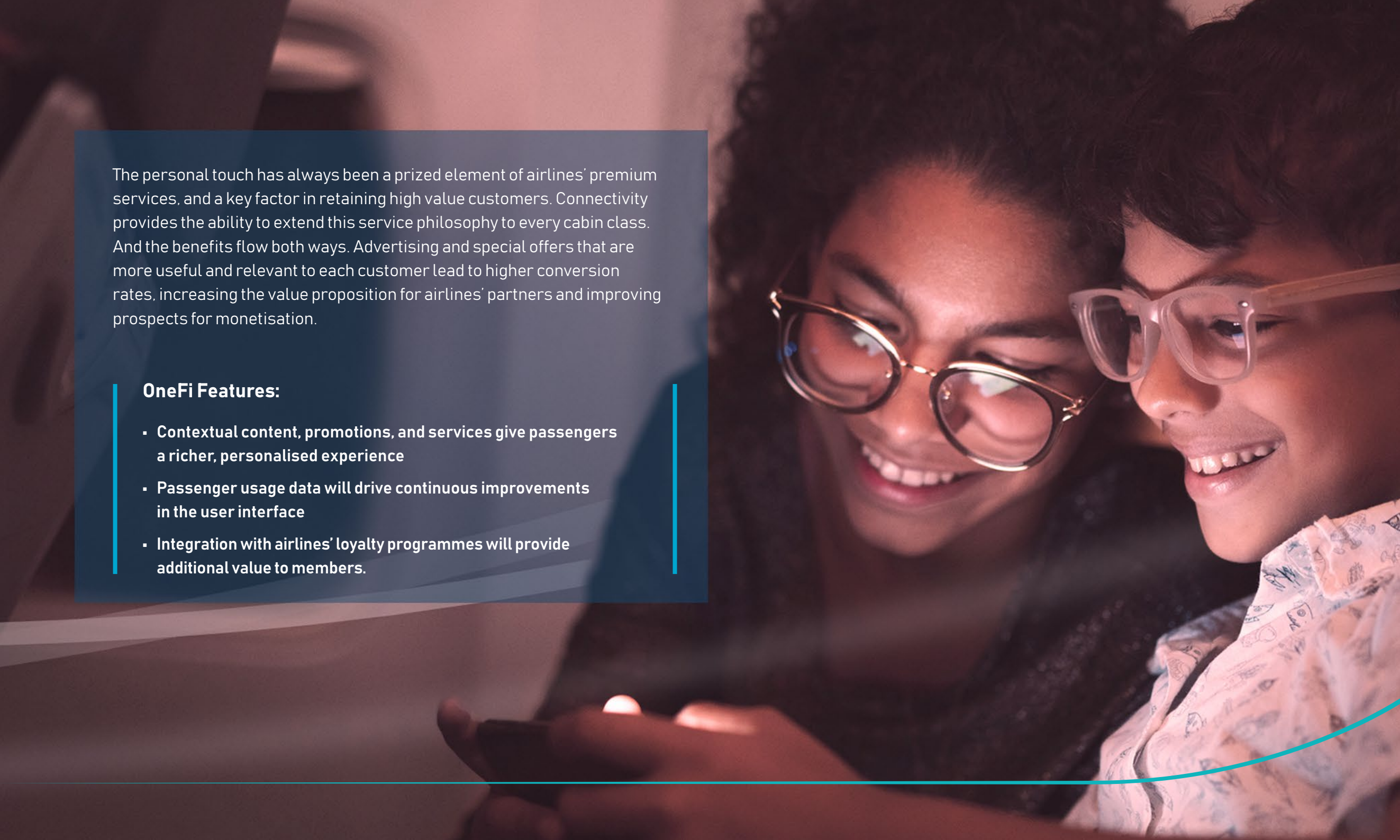
# 3. Personalise the inflight experience

Air travel is often an enabler for the most significant and memorable experiences of our lives, whether we're boarding a flight to embark on our honeymoon, interview for our dream job, or see our loved ones after years of separation due to COVID-19 travel restrictions. Taking time to acknowledge how special each of these journeys is can make a profound and lasting impression, while at the same time, giving passengers some extra personal attention can turn even a routine flight into the highlight of their year. Airlines have long recognised the power of personalisation to transform the passenger experience, yet the sheer volume of passengers makes it challenging for airlines to give each of their customers the personalised attention they deserve.

Onboard connectivity offers new opportunities to let customers know that they are seen beyond a seat number. Data submitted by passengers about their choices and behaviour can be integrated with the passenger manifest and

loyalty programme databases to provide each customer with a highly personalised experience. That could range from unique connectivity service offers and pricing, to suggesting entertainment and retail recommendations based on their destination, group characteristics, or previous inflight choices.

[Delta Airlines](#) is already moving in this direction, announcing last year that it plans to integrate Delta SkyMiles profile information, Delta studio content, and customer flight information "for a seamless, fully personalised experience." [Breeze Airways](#) founder and CEO David Neeleman has also shared a vision for inflight connectivity that "extends way beyond just delivering high-quality streaming and internet speeds." Offering a fully integrated experience through the Breeze app, he said, will give guests "unparalleled access to a wide array of personalised services and options."

A close-up photograph of a woman and a young boy, both wearing glasses, looking at a smartphone together. The woman is on the left, and the boy is on the right. They are both smiling and appear to be engaged with the device. The background is softly blurred, suggesting an indoor setting with warm lighting.

The personal touch has always been a prized element of airlines' premium services, and a key factor in retaining high value customers. Connectivity provides the ability to extend this service philosophy to every cabin class. And the benefits flow both ways. Advertising and special offers that are more useful and relevant to each customer lead to higher conversion rates, increasing the value proposition for airlines' partners and improving prospects for monetisation.

#### **OneFi Features:**

- Contextual content, promotions, and services give passengers a richer, personalised experience
- Passenger usage data will drive continuous improvements in the user interface
- Integration with airlines' loyalty programmes will provide additional value to members.



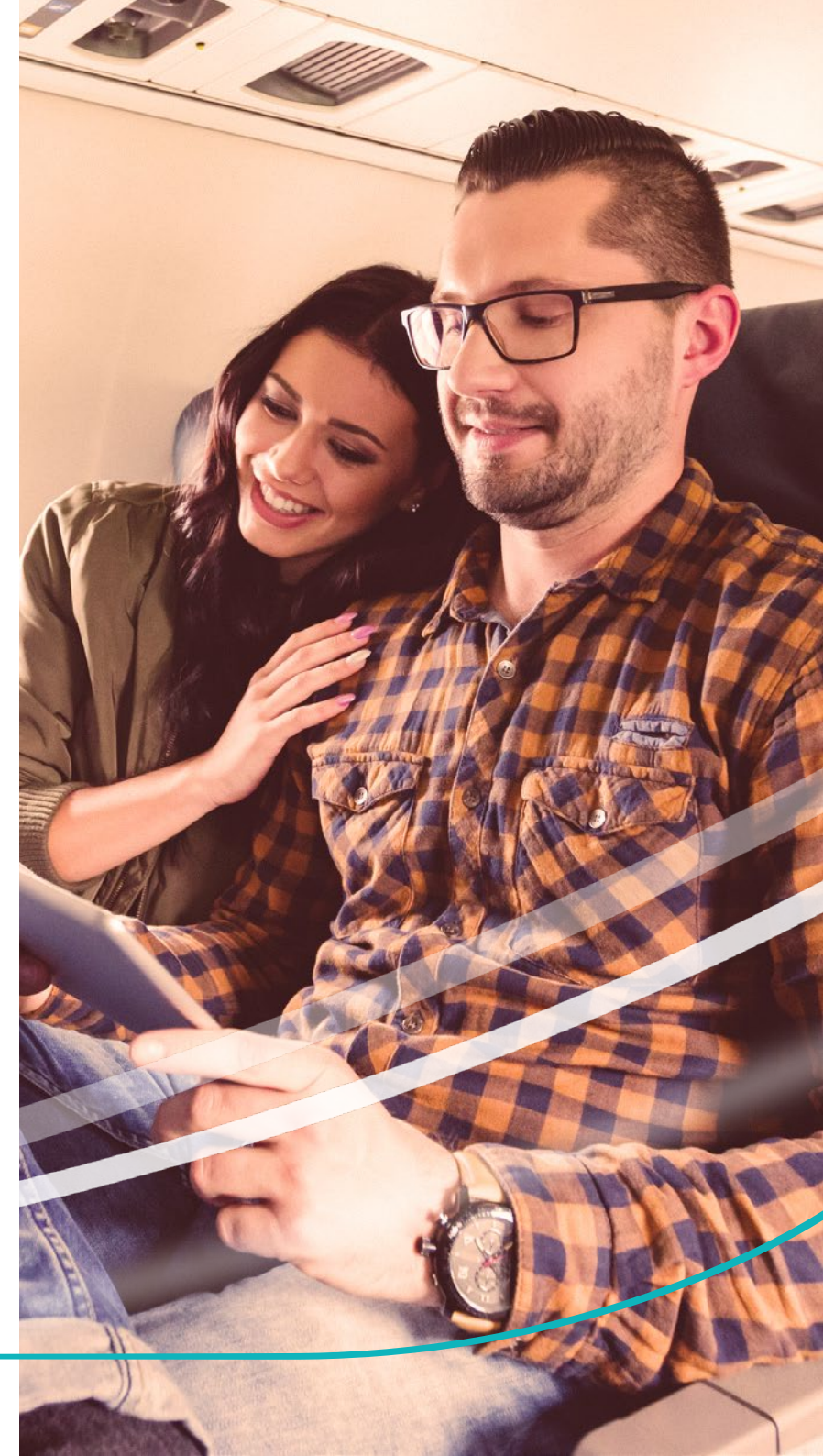
# 4. Enable e-services on board

E-commerce has been on the rise for years, but the arrival of COVID-19 pushed it to new heights. According to the International Trade Association, the pandemic resulted in roughly 20 per cent additional annual growth in online sales, above and beyond the previously forecast sales growth rates (Impact of COVID Pandemic on eCommerce, 2021). The U.S. Census Bureau's Annual Retail Trade Survey, released in April 2022, showed that e-commerce sales in the U.S. increased by \$244.2 billion or 43 per cent in the first year of the pandemic.

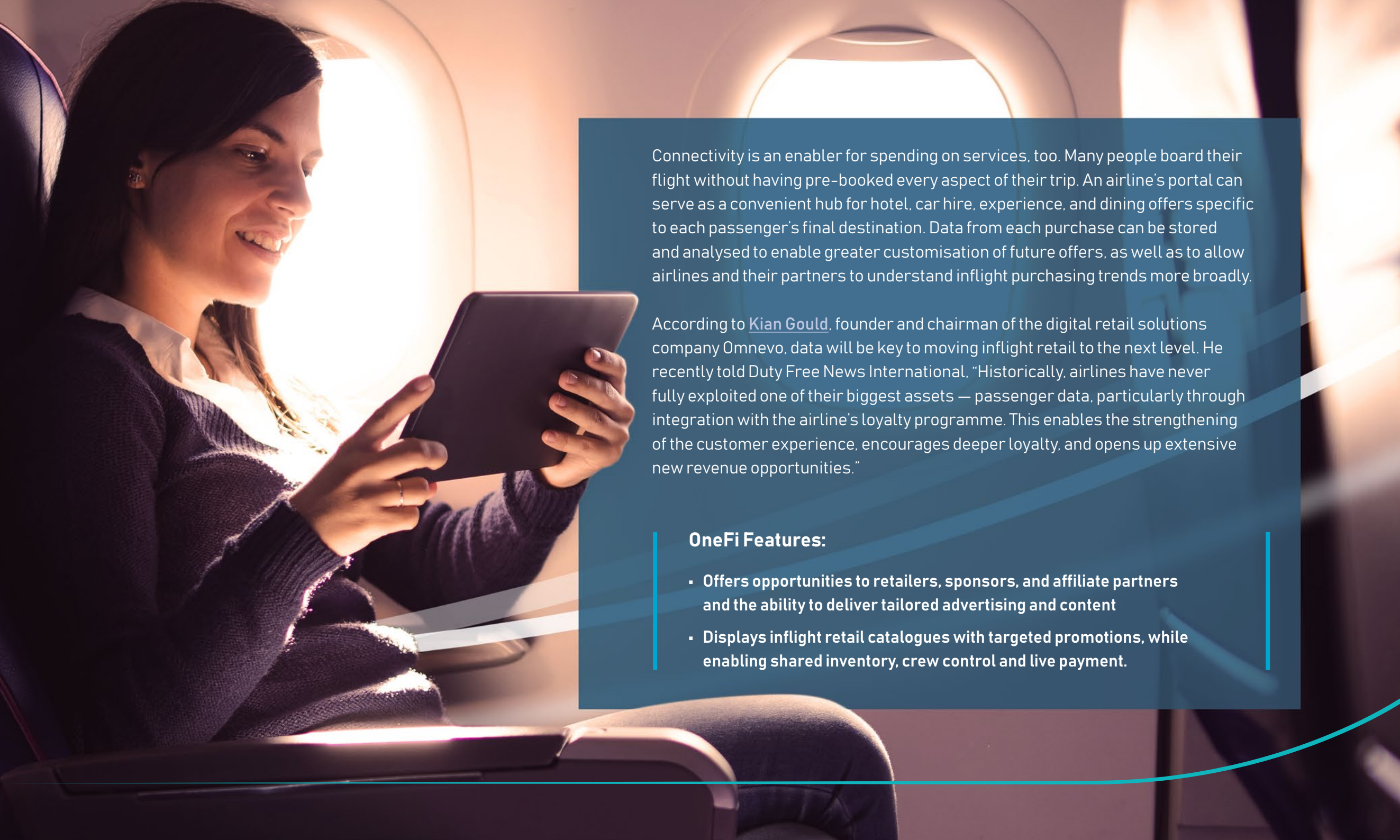
Today, many of us rely on online retailers for everything from household staples to luxury goods, not just the occasional specialty item. This new level of enthusiasm for e-commerce provides a compelling motivation to reimagine inflight retail for the post-pandemic traveller. Airlines and their retail partners have long recognised that customers are more likely to

make impulse buys at 30,000 feet, which is why inflight retail has become an important source of ancillary revenue.

By adding connectivity to the mix, airlines can both enhance their traditional duty-free offerings and embrace new retail opportunities. The ability to transmit duty-free orders to the ground while in flight allows airlines to add bulkier, heavier, and more expensive products to their catalogues without needing to carry that stock onboard, reducing their fuel burn and freeing up highly valuable cabin space. Airlines can also partner with retailers to make a wide variety of merchandise available for home delivery while providing additional value to members of their frequent flyer programmes. For example, JetBlue's partnership with Amazon allows members of its TrueBlue loyalty programme to earn TrueBlue points for every Amazon purchase they make in flight.







Connectivity is an enabler for spending on services, too. Many people board their flight without having pre-booked every aspect of their trip. An airline's portal can serve as a convenient hub for hotel, car hire, experience, and dining offers specific to each passenger's final destination. Data from each purchase can be stored and analysed to enable greater customisation of future offers, as well as to allow airlines and their partners to understand inflight purchasing trends more broadly.

According to [Kian Gould](#), founder and chairman of the digital retail solutions company Omnevo, data will be key to moving inflight retail to the next level. He recently told Duty Free News International, "Historically, airlines have never fully exploited one of their biggest assets — passenger data, particularly through integration with the airline's loyalty programme. This enables the strengthening of the customer experience, encourages deeper loyalty, and opens up extensive new revenue opportunities."

#### **OneFi Features:**

- **Offers opportunities to retailers, sponsors, and affiliate partners and the ability to deliver tailored advertising and content**
- **Displays inflight retail catalogues with targeted promotions, while enabling shared inventory, crew control and live payment.**





# 5. Keep passengers connected

With more of our lives online than ever before, passengers are increasingly coming to expect near-constant connectivity. During the pandemic, social media and chat took on new importance as tools for staying connected with friends and loved ones. Remote work has given millions of employees the flexibility to work from anywhere, but at the expense of being always “on”. Dropping offline for hours at a time is, for many of us, just not practical.

As cheap cellular data and free Wi-Fi have become ubiquitous on the ground, pricey inflight Wi-Fi packages are falling out of favour. An Inmarsat survey found that the use of free-of-charge inflight connectivity has accelerated steeply in recent years, with much of that occurring on smartphones (Disrupting the Airline Market: Free Passenger Wi-Fi, 2020).

Even before COVID-19, Euroconsult forecast that over 23,000 commercial aircraft will offer connectivity to their passengers by 2027, up from 7,400 aircraft in 2017 (Prospects for Inflight Entertainment & Connectivity, 2018).

With inflight connectivity no longer a differentiator in and of itself, airlines will come under increasing competitive pressure to offer Wi-Fi free of charge. Many airlines are already offering free inflight messaging, with explicit commitments to expand this service in the future. That’s true of [Delta](#), whose managing director of brand experience for DeltaStudio and Wi-Fi, Ekrem Dimbiloglu, said last year: “While free Wi-Fi won’t happen overnight, our mission to deliver an unparalleled experience for customers has not changed.”



While this trend is a positive one for passengers, airlines will be challenged to find new ways to monetise connectivity, beyond simply charging for the service. That will require new, creative approaches to partnerships and sponsorships and the platforms required to enable them.

#### **OneFi Features:**

- Provides airlines with multiple models for monetisation
- A flexible, complete backend integrates reporting, billing, payments, CMS, CRM, ad servers, exchanges, and advanced analytics.



BRINGING IT ALL TOGETHER:

# The fully connected journey

What will a connected journey enabled by OneFi look like?  
Let's consider some hypothetical examples.

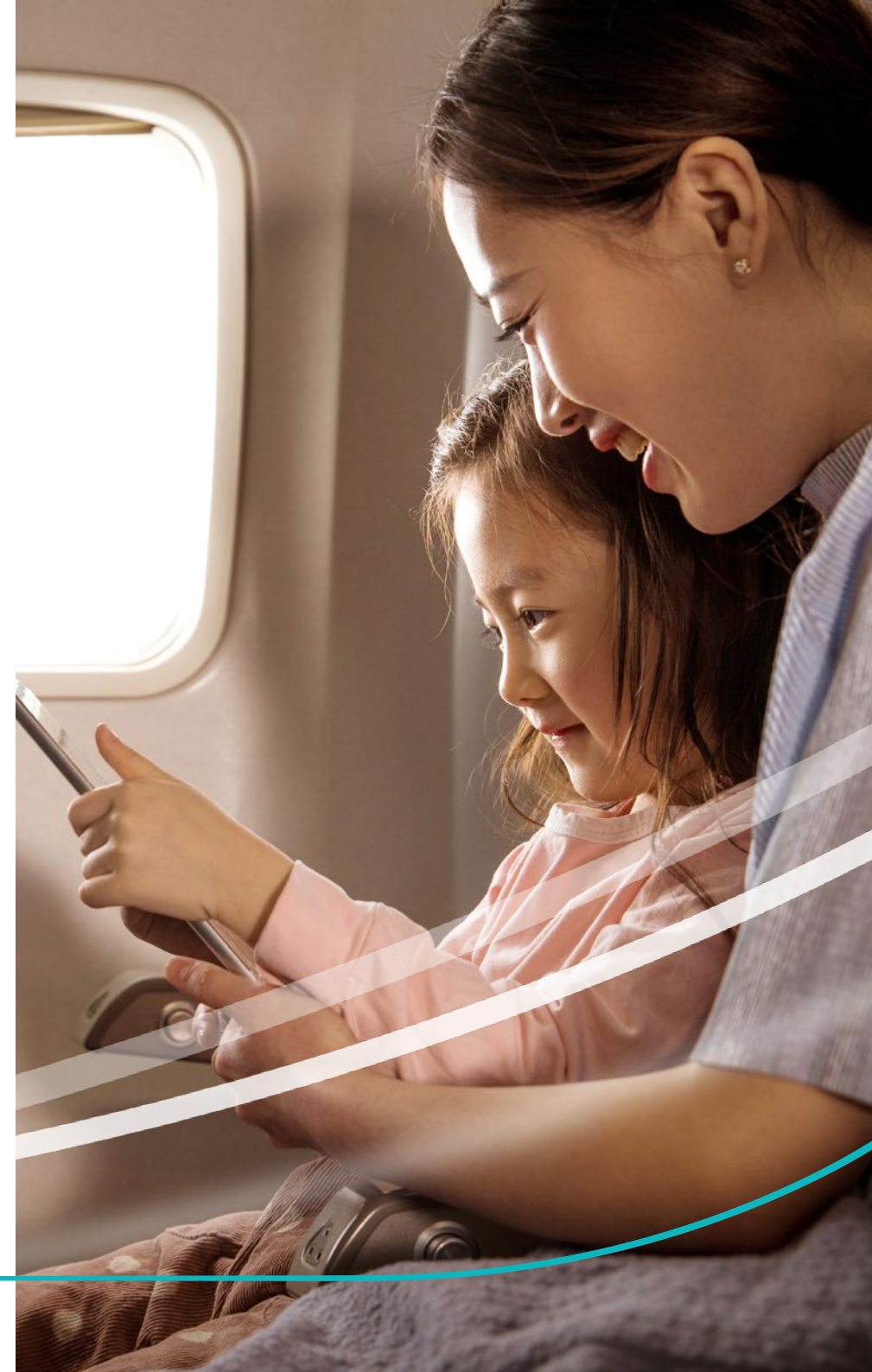
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**J**uliane Liu is a businesswoman who has been living and working overseas for the past decade. Before the pandemic, she travelled home regularly to see her family, in addition to flying frequently for work. When COVID-19 struck, however, her employer made her position remote and suspended all business travel, and lockdowns made international travel impractical. Now, she and her five-year-old daughter Elis are finally returning home for her cousin's wedding, the first time she will have seen many of her family in three years.

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After being warmly greeted by the cabin crew by name, Juliane and her daughter settle into their seats for the long flight ahead. Each of them has a tablet, and Juliane first connects Elis to their preferred subscription streaming service so that she can watch the latest episodes of her favourite programmes. With her daughter happily engaged, Juliane has time to catch up on Teams messages from her colleagues and respond to a few urgent client requests via WhatsApp.

Juliane hasn't bought a wedding gift yet — she was counting on doing that once she arrived. Browsing through the duty-free catalogue on the OneFi portal, however, she finds the perfect crystal vase and places an order. While she's at it, she adds a bottle of premium Champagne, because she wants to celebrate her first meal home with family.





After the meal service, Elis nods off to sleep. While she was connecting via OneFi, Juliane noticed a free trial subscription offer from the streaming service with the buzzy new show her best friend can't stop talking about. Juliane has been too busy recently to justify signing up for yet another subscription service, but in the air, the offer makes sense. She enters her personal details and is soon ready to binge.

When Elis wakes up a few hours later, Juliane uses the OneFi portal to order a glass of apple juice and a warm cookie without having to flag down the cabin crew. A few minutes later, they're delivered directly to her daughter's seat along with a complimentary colouring book and crayons.

As they approach their destination, Juliane spends more time looking at the moving map, eagerly tracking their progress. She's a little worried about what to expect at the airport, but a review of the destination guide on the OneFi portal assures her that there have been no major changes since her last visit. She messages her father to let him know that she's still on track for an on-time arrival.

As the city where she grew up comes into view through the window, Juliane is thrilled when a flight attendant leans over to tell her, "Welcome home." Before her flight, she had been hesitant about travelling again. Now, she's happy to be back in the air. Her flight has been everything she had hoped it would be — and so much more.



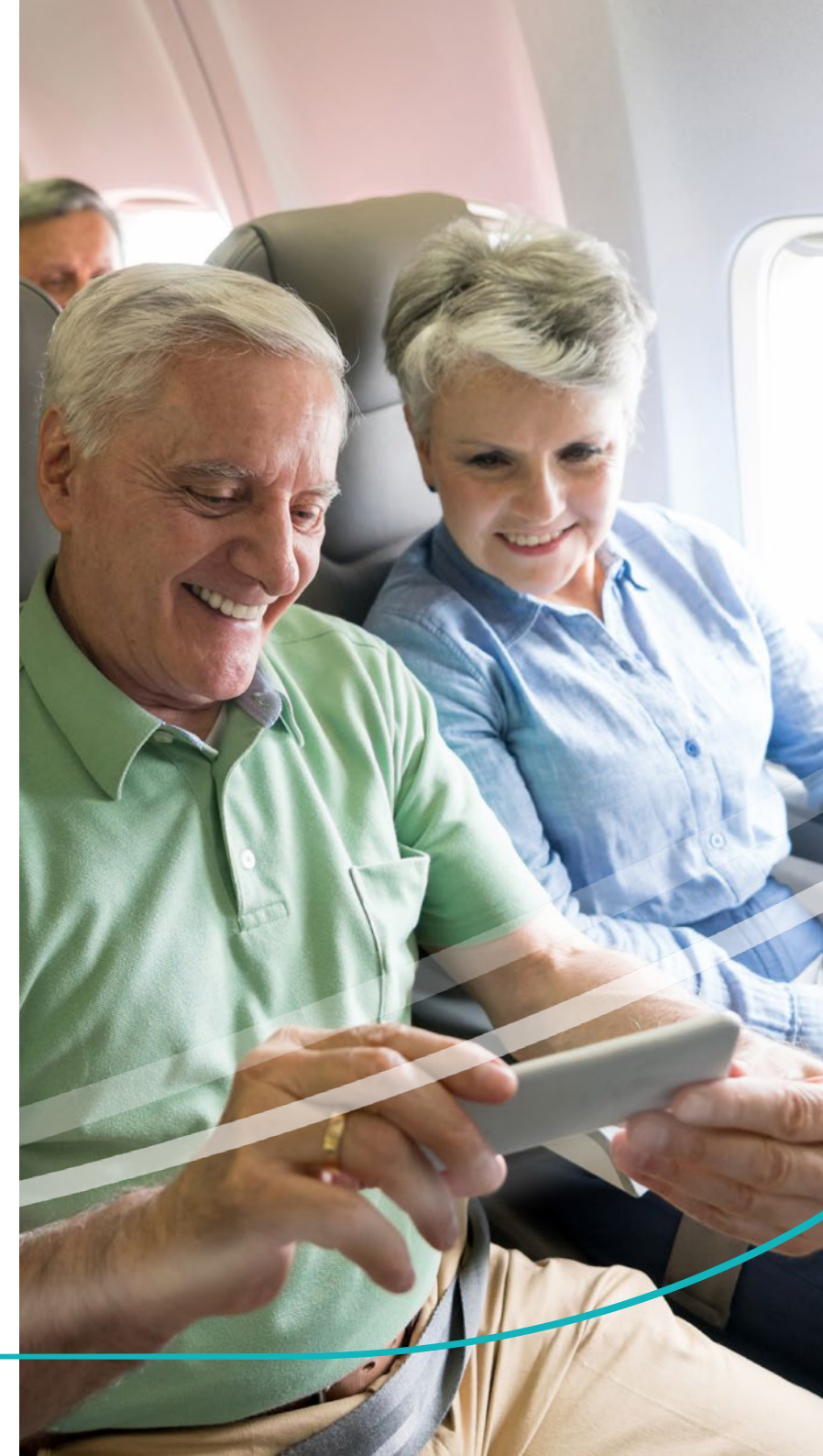
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**M**eanwhile, things aren't proceeding quite as smoothly for Nancy and Bill Martin, who are travelling to meet their fourth grandchild for the first time. Due to a weather delay at their departing airport, their flight was late getting off the ground, which means they'll miss their tight connection. The situation is especially stressful for them because neither has been on a plane for four years, and Bill needs wheelchair assistance getting through the airport.

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A flight attendant notices their distressed expressions and asks if he can help. After they explain their dilemma, he tells them about the services they can access through OneFi on Nancy's smartphone. They pull up the portal and obtain the latest alerts about their trip from the airline. Although it is confirmed that they'll miss their connection, they learn that they've already been rebooked on the next available flight — a huge relief. Nancy uses OneFi's free ad-supported messaging to let their son know about the change in plans.

Nancy and Bill are used to going to bed early, and they know they'll be tired at the end of their long travel day. So, when they see an option on the OneFi portal to have their luggage delivered directly to their son's house, they eagerly select it. With their travel arrangements sorted, they have time to relax and do a bit of shopping, visiting one of the airline's retail partner sites to find a lovely gift for their new grandson.





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**F**or best friends Alex, Ife, Colin, and Padma, the timing of COVID-19 couldn't have been worse. They were at university when the pandemic struck in 2020, and lockdowns forced them to complete their studies remotely, with none of the socialisation they were looking forward to. Their graduation ceremony was cancelled, as was the celebratory island holiday they had been hoping for, and their first jobs have all been remote positions, lacking the camaraderie of an office. Now they've finally arranged their schedules to take that island trip together, and their mood is jubilant.

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They haven't planned much beyond booking a hotel, as simply being together again has been more than enough to look forward to. Plus, with so much uncertainty around travel generally, they've been reluctant to commit too much money to their holiday in advance. But as they hear the chime of the seat belt sign going off, it hits them: This is really happening. We're on our way.

Padma is the first of them to connect to OneFi, and notices a destination guide. "Check it out!" she tells her friends, and they each pull it up on their smartphones. Colin, the foodie, heads straight for the dining guide and quickly discovers the perfect restaurant for their arrival meal. Ife finds a discounted snorkelling tour and books it for the following day. Alex learns about a concert scheduled for later in the week and reserves four tickets before they sell out.

Padma tells them to look up from their phones and snaps a group selfie, which she immediately posts to her social accounts using the onboard Wi-Fi. It's the first digital souvenir of a trip they'll remember for the rest of their lives.



## Summing up

While air travel is starting to rebound, passengers have different expectations and priorities today than they did before COVID-19. The pandemic was a catalyst for contactless interactions, accelerating the pre-existing trend of using personal electronic devices on board. Passengers are wary of disruptions and want more control over their end-to-end travel experience. Above all else, they expect to be connected at every part of their journey, as so many aspects of our work and personal lives have moved online. Airlines should act now to capitalise on these trends before their competitors. OneFi is an opportunity to do that in ways that create new streams of revenue while delivering real value for passengers. The tools for managing the onboard connected experience are evolving. As ever, early adopters will reap the rewards.







# One platform, a world of possibility

“ We wanted to make it easy and fun for passengers to find relevant services. We think passengers want the same sort of portal experience, the same sort of web experience that they get on the ground. Inmarsat’s OneFi is a step change for airlines looking to construct and curate their passengers’ inflight experience, monetise their Wi-Fi services and ensure they keep pace with evolving passenger needs. ”

NATHAN CLAPTON,  
VP of Inflight Media at Inmarsat Aviation

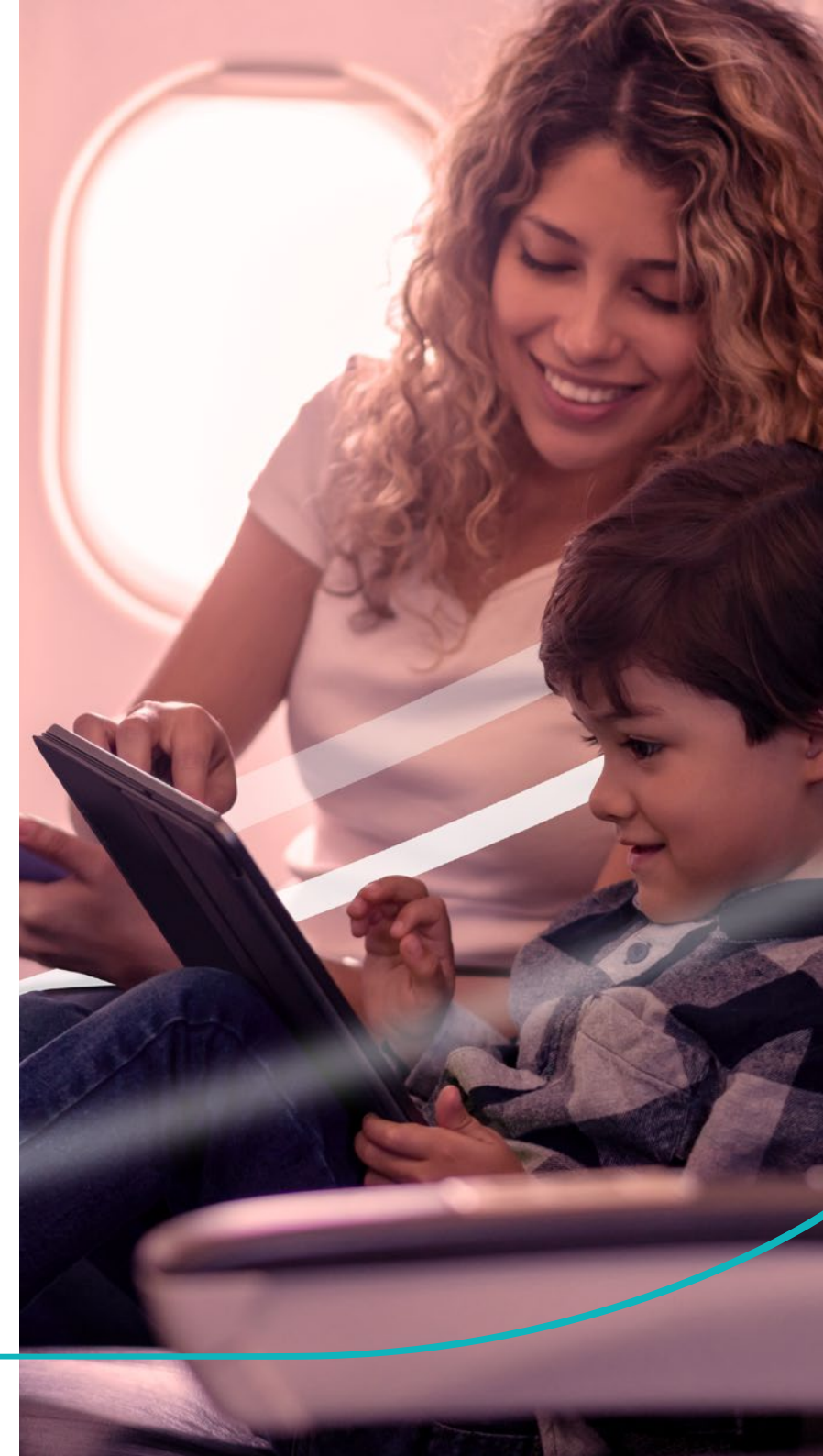


OneFi is a state-of-the-art platform that helps airlines reimagine the passenger experience, making Wi-Fi on board more useful, relevant, and personalised. The capabilities of the platform and the technical functionality is enormously flexible to support airlines' ambitions of enhancing passenger experience. It enables passengers to do a variety of things including ordering food and beverages, purchasing seat upgrades, receiving the latest flight and destination information, and signing up for frequent flyer programmes, all in real-time, from their seat. Passengers can browse the internet, stream videos and audio, shop online and enjoy other e-commerce offerings, using high-speed inflight broadband that airlines could choose to offer free of charge as a benefit of being a part of their loyalty scheme or funded through OneFi's sponsorship and advertising features.

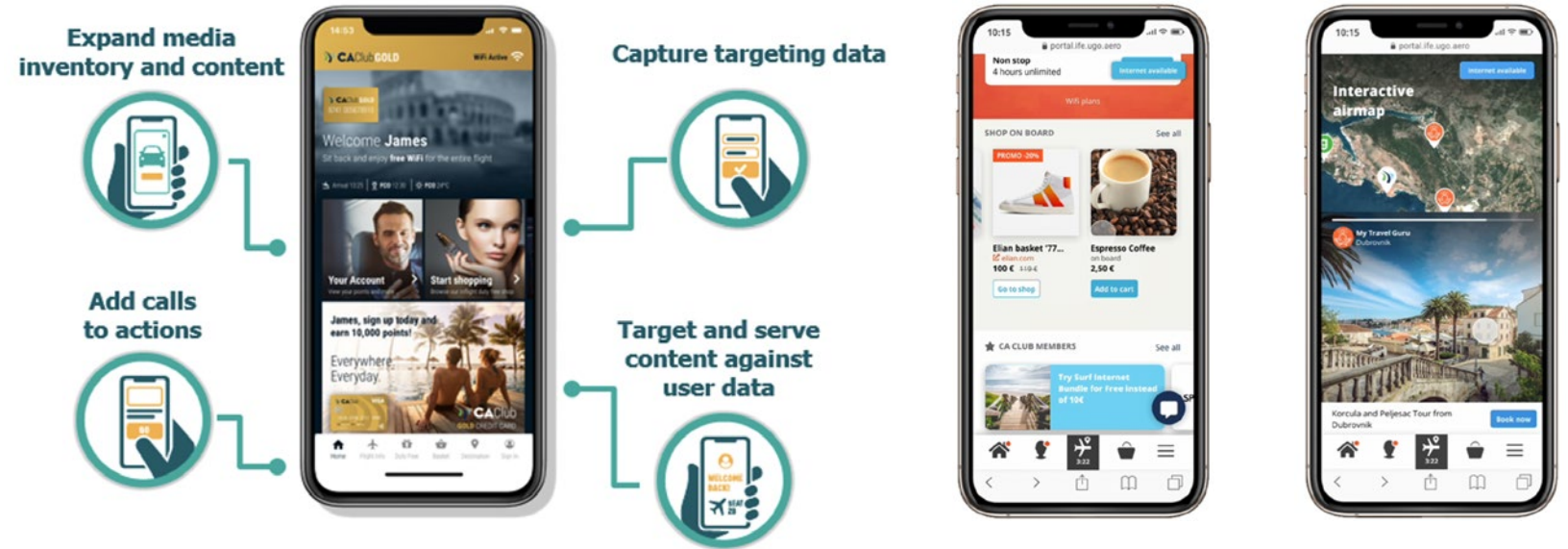
Because it is built with connectivity at its heart, OneFi is uniquely designed to drive monetisation through targeted content, digital commerce, advertising and sales-lead generation. This functionality built into the portal will engage passengers and maximise conversion across a range of contextual services. Advanced analytics are integrated into the platform to support continuous optimisation. This is a real opportunity for airline brands to attract new brand partners outside traditional aviation services, offering content partnerships and an innovative new advertising channel.

**“ OneFi is going to revolutionise the passenger experience. It's not just putting Wi-Fi onboard; it's actually making the internet useful for passengers by making it more relevant, more personalized and their travel experience better. ”**

**SHANE MAYER,**  
Head of Partnerships at GET YOUR GUIDE



# How OneFi can deliver the fully connected experience



- Frictionless connection to inflight Wi-Fi service
- Captures data preferences that can be actioned in the portal
- Integrates with airline loyalty programme. Passengers can spend points on services and offers through the portal
- Connect and integrate with workplace collaboration tools including Teams, Slack and business emails
- Contact cabin crew in order to deliver enhanced passenger services
- Secure ordering and purchase with stock management for cabin crew
- Chat with friends and family and share photos and videos
- Connect to leading social media channels
- Affiliated partner network including credit card providers, car rentals, tour operators etc.
- Wallet integration
- Access games to play during the flight
- Offer Freemium subscription activations
- View latest TV shows/ movies on their personal device
- Provide information on the flight destination
- Connect to the moving map, flight information





# 5 things

that make OneFi  
different



## MONETISATION:

The platform is designed to generate ancillary revenues from multiple contextual services. It incorporates the tools to use data to maximise conversions.



## CONNECTIVITY:

Goes far beyond paid Wi-Fi, augmenting monetisation and reducing cost across a range of retail, content, and destination services.



## FLEXIBILITY:

A modular portal, customisable UI, off-the-shelf features, and standardised APIs make for quicker easier set-up. Different packages available to suit airlines' needs as defined by the OneFi bundles.



## PASSENGER EXPERIENCE:

Engaging design and contextual content attract passengers to and through the portal.



## PARTNER NETWORK:

Growing portfolio of aviation-focused vetted service providers across retail, advertising and commerce can be seamlessly integrated into UI.



## CONTACT

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