Routehappy 2018 Wi-Fi Report Evaluates Global In-Flight Wi-Fi

82 Airlines Now Offer In-Flight Wi-Fi;
With Wi-Fi Accessible on Nearly Half of All Available Seat Miles Worldwide

NEW YORK – January 30, 2018 – Routehappy, the rich content platform for flight shopping, released today its annual Routehappy 2018 Wi-Fi Report, providing the most comprehensive worldwide overview of in-flight Wi-Fi. In 2017, major airlines from every corner of the globe began their long-awaited Wi-Fi rollouts, while early adopters began system upgrades. From British Airways in the U.K. to Qantas in Australia, Wi-Fi at 32,000 feet is now more ubiquitous than ever before.

Highlights of the Routehappy Wi-Fi Report 2018 include*:*

- 82 airlines worldwide now offer in-flight Wi-Fi
- 12 additional airlines now offer in-flight Wi-Fi, representing a 17% increase from the 2017 report
- Nearly half (43%) of all available seat miles (ASM) worldwide now offer at least a chance of Wi-Fi; up 10% from the 2017 report
- U.S. airlines offer at least a chance of Wi-Fi on 86% of their ASMs, with 85% of ASMs fully rolled out
- Non-U.S. airlines offer at least a chance of Wi-Fi on 32% of their ASMs, up by 14% from the 2017 report
- The top three airlines that offer the most ASMs with Wi-Fi are Delta, American, and Emirates, respectively
- Three carriers now offer Wi-Fi on 100% of their flights: Icelandair, Southwest, and Virgin Atlantic
- 13 airlines globally offer Wi-Fi on 100% of long-haul* flights: Air Europa, Delta, Emirates, Etihad, Eurowings, EVA Air, Iberia, Kuwait, Lufthansa, SAS, Scoot, United, and Virgin Atlantic
- Best Wi-Fi is now available on 16% of ASMs worldwide, representing a staggering 129% increase from the 2017 report
- Basic Wi-Fi continues to lose ground, now representing just 27% of connected ASMs worldwide, a 16% decrease from the 2017 report
- Better Wi-Fi remains the most common type of Wi-Fi, at 57% of ASMs worldwide. While Better Wi-Fi represents a majority of ASMs, it is now losing ground to Best Wi-Fi as airlines upgrade existing systems or start fresh with Best Wi-Fi

Small airlines sign on in 2017
While passengers have come to expect Wi-Fi on large global airlines, many smaller airlines have now begun offering Wi-Fi as well. Air Astana from Kazakhstan, Air Côte d'Ivoire from Ivory Coast, and Air Mauritius from Mauritius are just a few of the numerous smaller airlines that began offering Wi-Fi in 2017. These airlines view Wi-Fi as a necessary amenity to better compete with larger airlines.

The installation and operational cost of Wi-Fi systems has dropped to levels where just about any airline in the world can begin offering the service, something thought to be impossible for smaller airlines just a few years ago. At the same time, many smaller airlines are beginning to renew their fleets, opting to take new aircraft with Wi-Fi directly from the factory. In years past, only the slowest and most expensive Wi-Fi systems were available during aircraft assembly. Today, airlines can simply tick a box and have their new Airbus and Boeing aircraft delivered with state of the art Wi-Fi systems.

Faster. Cheaper. Global.
2017 saw a major expansion of the fastest available Wi-Fi systems. In the United States, Delta Air Lines has upgraded the Wi-Fi system on a majority of its domestic fleet for the second time. Originally flying with a Basic system, later upgraded to a Better system, Delta now operates more than 350 aircraft with Best Wi-Fi from Gogo installed. These aircraft now offer access to streaming services such as Netflix anywhere they fly, even over oceans, and for a cost lower than previous generations of Wi-Fi systems. American Airlines and Alaska Airlines are following suit, also upgrading aircraft for the second time.
In Europe, The Lufthansa Group launched Inmarsat's GX for Aviation services in 2017, providing Best Wi-Fi in Europe for the first time. The service is currently installed on more than 150 aircraft, including all

Austrian narrowbody aircraft, and is now rolling out to all Lufthansa and Eurowings mainline narrowbody aircraft. International Airline Group began its rollout of Best Wi-Fi from Gogo on its long haul aircraft, beginning with British Airways and Iberia.

In Oceania, a region that has been slower than others to adopt in-flight Wi-Fi, a race to begin offering Wi-Fi kicked off in late 2017. Qantas signed on with ViaSat, Virgin Australia with Gogo, and Air New Zealand with Inmarsat. This spread drives home the point that Best Wi-Fi is now a reality, offered globally and from multiple vendors.

Routehappy Wi-Fi Report Released at APEX TECH in Los Angeles
Routehappy provided the official release of its annual Routehappy Wi-Fi report today at APEX TECH in Los Angeles, hosted by the Airline Passenger Experience Association (APEX). The two-day event highlights global airline technological advancements, with the 2018 Routehappy Wi-Fi serving as a centerpiece announcement to the technological advancement of the airline industry.

“2017 was another progressive year for in-flight Wi-Fi, with a large increase in the amount of airlines that provide Wi-Fi access, on top of the growing availability of nearly half the available seat miles worldwide,” said Robert Albert, CEO of Routehappy. “The 129% growth of Best Wi-Fi is extraordinary, it shows the commitment airlines are making to best in class systems and we expect to see this number increase even more in 2018.”

“Routehappy’s exhaustive analysis with Wi-Fi adoption approaching 50% of available seat miles worldwide demonstrates how far airlines and their connectivity providers have gone to serve passengers,” APEX CEO Joe Leader stated. “The depth of data and information that Routehappy tracks about in-flight Wi-Fi is unparalleled in the industry, we can see from this report that In-flight connectivity worldwide has now advanced beyond leading airlines to mainstream acceptance driven by airline passenger demand.”

Routehappy Wi-Fi data covers all airlines offering Wi-Fi with expanded coverage
While airlines are still in the process of rolling Wi-Fi out to their fleets, Routehappy has scoured thousands of data points to determine the exact status of deployment. Routehappy’s Wi-Fi data not only tracks which airlines offer in-flight Wi-Fi, but also its availability to consumers by chance, quality, coverage, and cost, tracked by cabin, subfleet, airline, and flight. Routehappy indicates whether the connection/performance on all flights is Basic, Better, or Best based on the underlying technology deployed. Subfleets that are not fully rolled out are provided as a chance of Wi-Fi. Additionally, Routehappy uses a sophisticated and proprietary algorithm to indicate whether a flight will have only partial or no Wi-Fi coverage on any particular route due to network or regulatory restrictions.

Deep domain expertise combined with unique industry relationships, a sophisticated data platform, and flight matching algorithms ensure that the data compiled by Routehappy is the most complete and accurate ever assembled to match product attributes to flights. Customers of Routehappy's Scores & Amenities API have full access to Wi-Fi data for every flight in the global flight schedule.

About Routehappy
Routehappy powers rich content for flight shopping, helping airlines and distributors differentiate and better monetize their products. Routehappy's Scores & Amenities API provides flight scores and cabin amenity data, including aircraft, seat, layout, entertainment, Wi-Fi, power, fresh food and relative duration. Routehappy Hub is a cloud-based platform that helps airlines create, manage and distribute targeted product and ticket attribute content, in standardized formats UPA (Universal Product Attribute) and UTA (Universal Ticket Attribute) wherever flights are displayed. Routehappy is based in New York, serving airlines and distributors worldwide. For more information, visit www.routehappy.com. To see Routehappy rich content in action, visit www.routehappy.com/use-cases.

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Methodology:
Routehappy's 2018 Wi-Fi Report is based on an analysis of all flights worldwide on a typical weekday travel day (departing 12 February 2018) using Routehappy data as of 12 January 2018.

*Long-haul is defined as flights longer than 2,800 miles (approximately six hours or longer)

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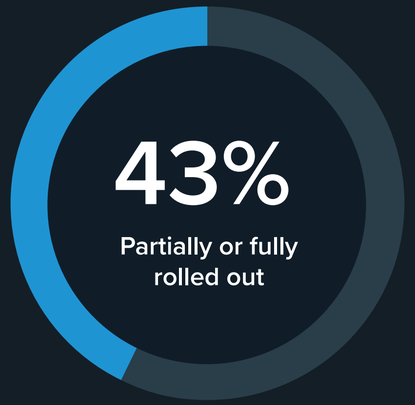
Key Terms:
Available seat miles (ASM): A standard industry measure of an airline's passenger carrying capacity; it is the number of seats for sale multiplied by the number of miles flown. Example: A 200-seat aircraft operating a 2,500-mile flight offers 500,000 ASMs.
Best Wi-Fi: Fastest Wi-Fi systems currently available, capable of advanced media streaming (whether allowed by airline or not); comparable to a home connection.
Better Wi-Fi: Wi-Fi systems capable of full web browsing and limited media streaming.
***Basic Wi-Fi*:** Wi-Fi systems providing basic web browsing and no media streaming capabilities.
Long-haul: Flights longer than 2,800 miles, approximately five hours or longer (minimum requirement for comparison of seven Wi-Fi equipped aircraft operating a total minimum of seven long-haul flights each day)
Full chance: 100% of a scheduled subfleet has Wi-Fi installed.
Very good chance: More than ⅔ of a scheduled subfleet has Wi-Fi installed.
Good chance: ⅓ to ⅔ of a scheduled subfleet has Wi-Fi installed.
Some chance: Up to ⅓ of a scheduled subfleet has Wi-Fi installed.
No chance: Either a scheduled subfleet has no Wi-Fi installed or operates outside of the installed technology's coverage area. Flights with partial coverage are counted as having Wi-Fi.

In-Flight Wi-Fi Worldwide

Chance of Wi-Fi by Percentage of ASMs

Routehappy 2018 Wi-Fi Report



Wi-Fi Quality by Percentage of ASMs

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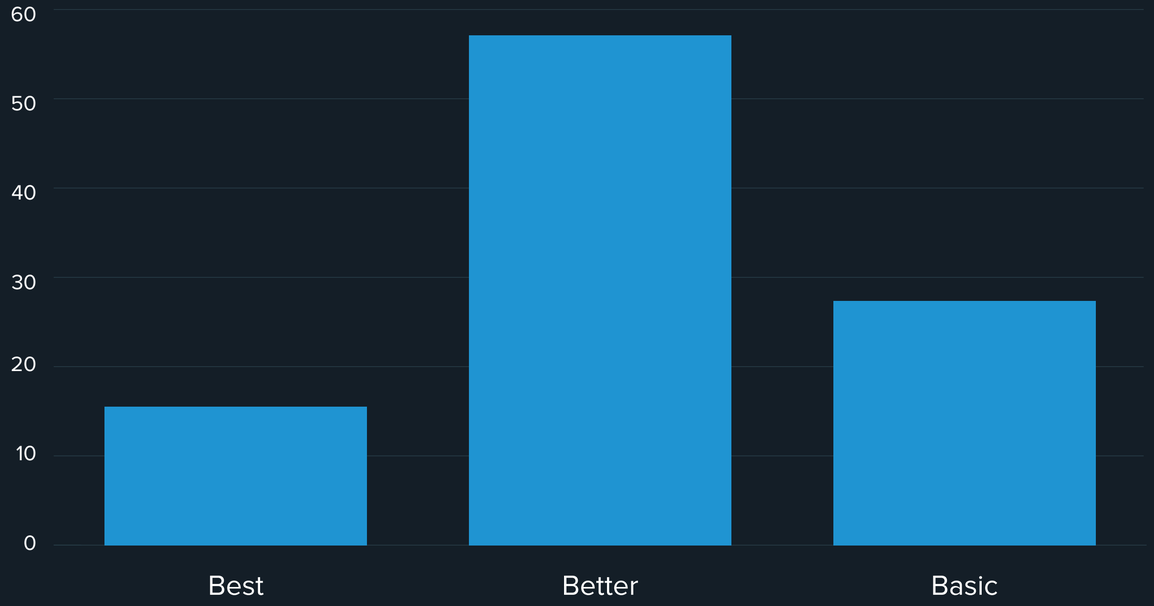

Wi-Fi Rollout Status

U.S. Airlines by Percentage of ASMs

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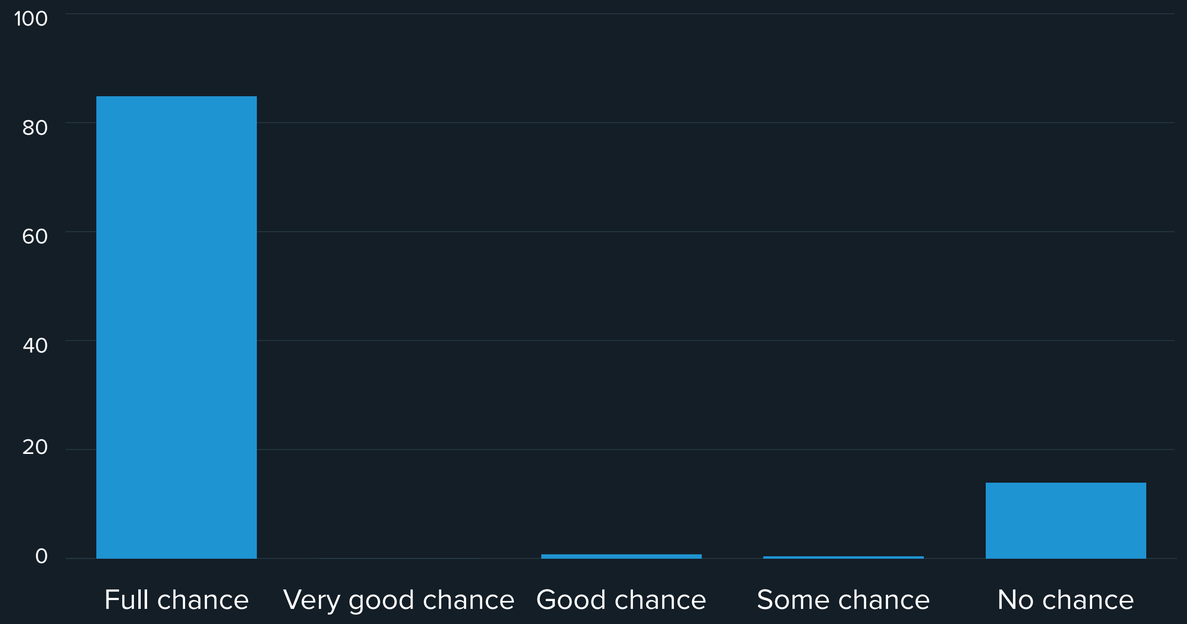

Non-U.S. Airlines by Percentage of ASMs

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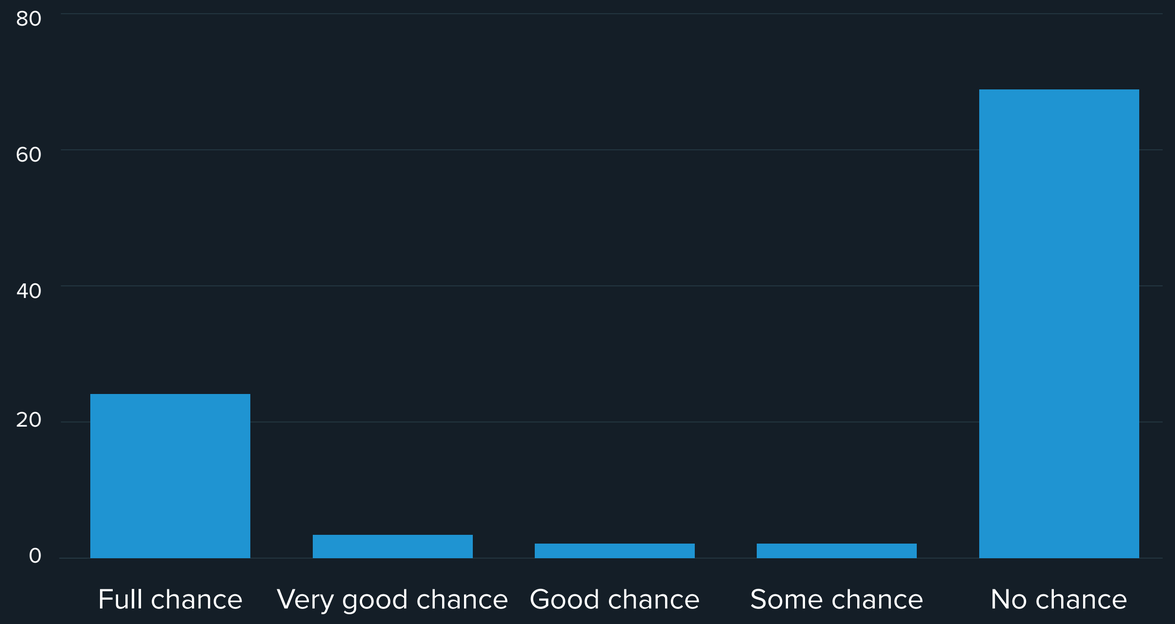

Top Airlines Worldwide

By Total ASMs

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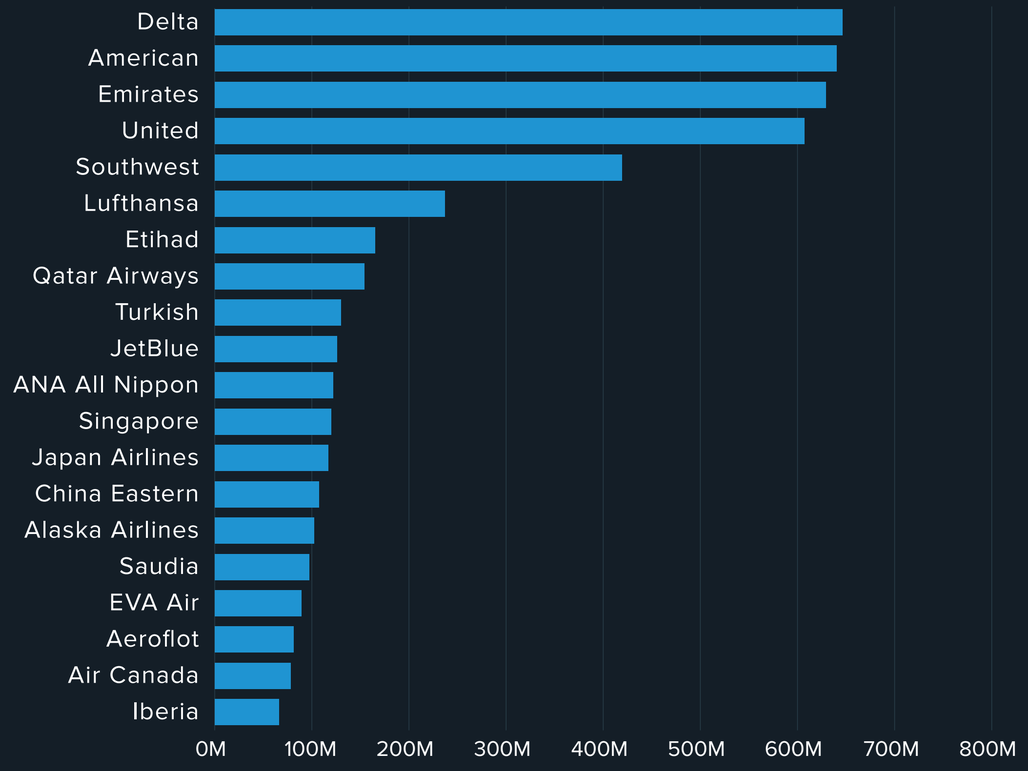

By Percentage of ASMs

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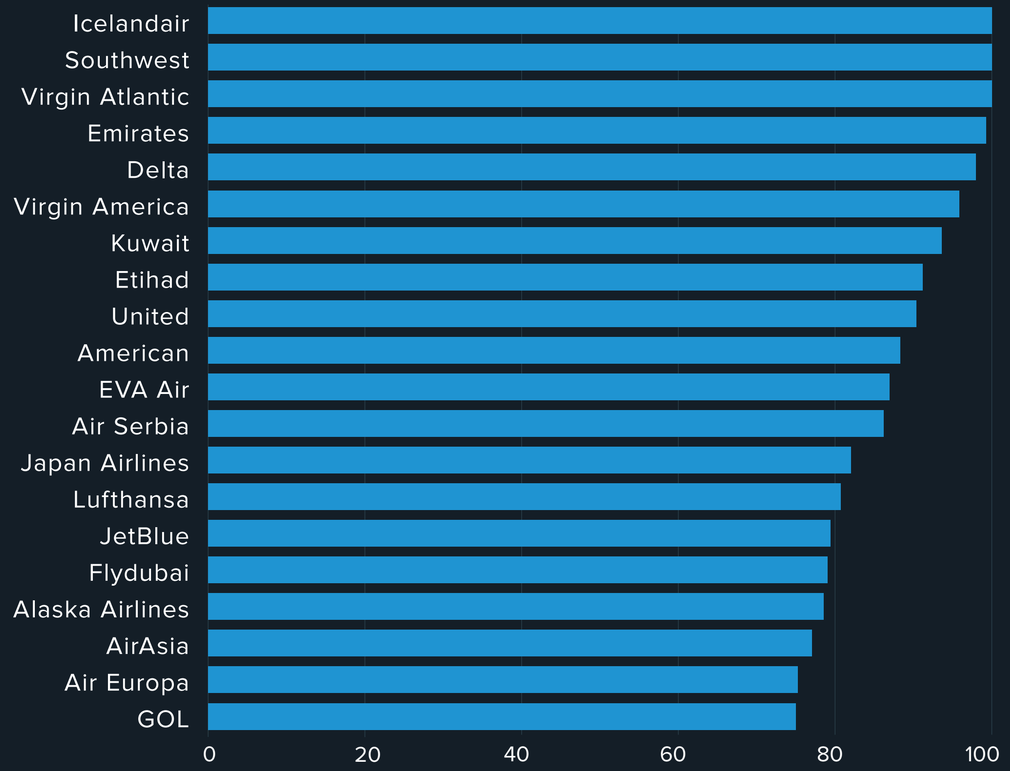

Long-haul Routes

By Total ASMs

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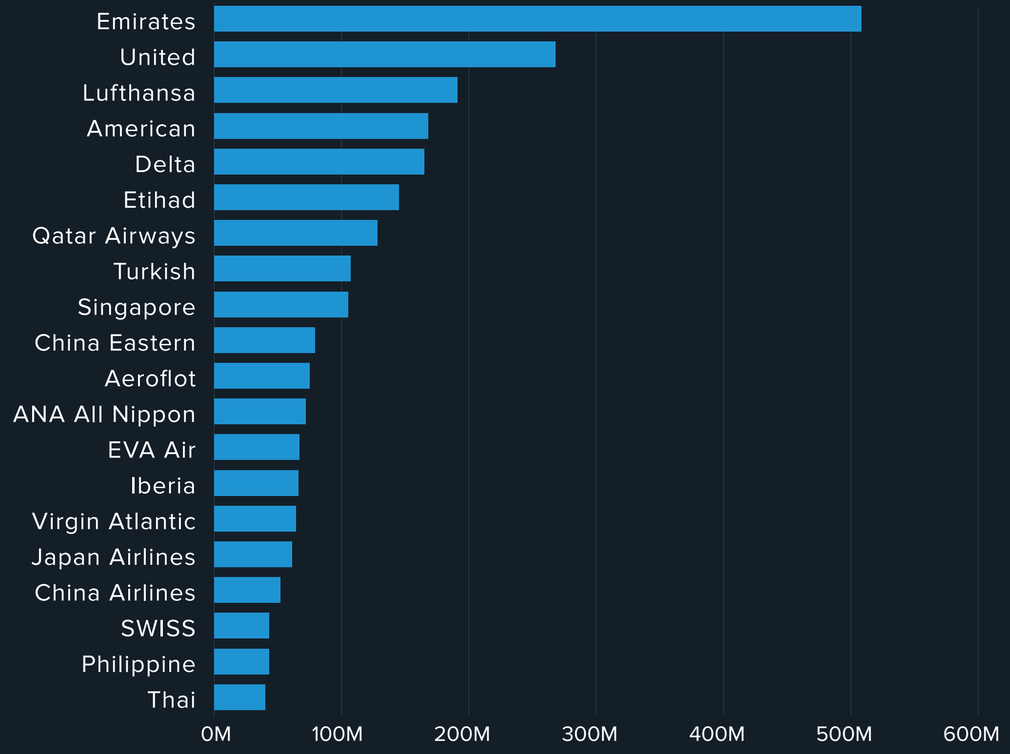
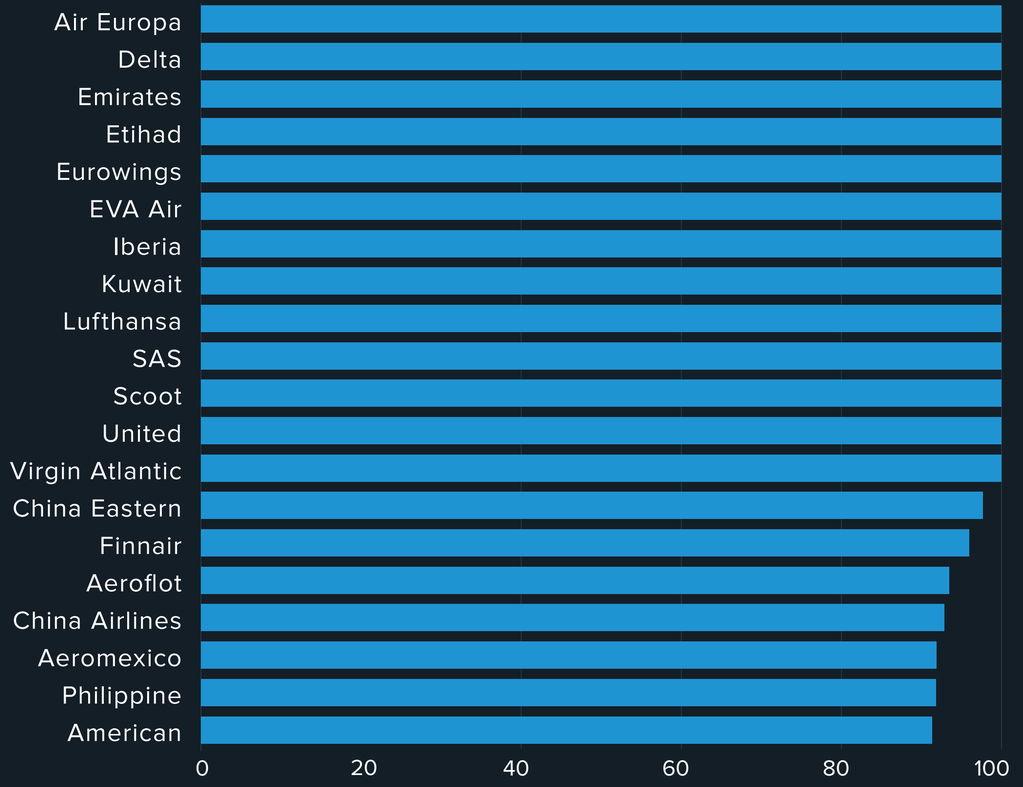


By Percentage of ASMs

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