Some of the key questions answered by this report include:

- Which airlines in China, India and Russia currently provide in-flight Wi-Fi?
- How quickly will the number of connected aircraft grow over the next ten years? To what extent? (best-case/worst-case forecast scenarios and risk factors provided)
- What does the competitive landscape look like today in these markets? How will this change? Who are the key local service providers and how will these providers disrupt the in-flight connectivity value chain?
- How do cumulative connections and annual installations break down by communications technology? (ATG, L-band, Ku-band, Ka-band or Hybrid)
- How will airlines in these three markets overcome the costs of installing in-flight connectivity? Will a new business model emerge? If so, which will succeed?
- What are the barriers to entry and other considerations for international companies attempting to enter the Chinese, Indian or Russian markets?
- How will strict government legislation affect the adoption rate and operational costs of in-flight connectivity?
- What is the current and future size of the market for key in-flight connectivity hardware (in terms of revenues, unit shipments and average selling prices)?
- What are the major technological trends taking place?
- What are the key drivers and inhibitors of market growth?
OVERVIEW

The “In-Flight Connectivity in China, India and Russia” is a new deep dive study from Valour Consultancy that sits within the firm’s highly-regarded aviation portfolio of research. Based on a period of eight months’ research and developed with input from more than 40 companies from across the value chain, this study provides an unprecedented view of the market for in-flight connectivity in three of the most challenging countries in the world – at least for global vendors.

Alongside a lengthy discussion of key drivers and inhibitors of market growth, this report quantifies annual in-flight connectivity installations, total installed base and service revenues in 2018 and provides a ten-year forecast out to 2028. Data is segmented by product type, fitment type, aircraft type, connectivity type and route type, with a full qualitative discussion of the key trends at play in support of this. In-depth company profiles of major players, both global and locally-based, are also included, along with their respective revenue market shares.

MARKET BREAKDOWN

- GEOGRAPHIC REGION
  - China
    - Mainland China
    - Hong Kong, Macau & Taiwan
  - India
  - Russia

- FITMENT TYPE
  - Retrofit
  - Line fitment

- AIRCRAFT TYPE
  - Narrow-body
  - Wide-body
  - Regional aircraft

- CONNECTIVITY TYPE
  - Air-to-Ground (ATG)
  - L-band satellite
  - Ku-band satellite
  - Ka-band satellite
  - Hybrid systems

- PRODUCT TYPE
  - Standalone Wi-Fi
  - Cellular AND Wi-Fi
  - Penetration rate

- ROUTE TYPE
  - Domestic
  - International

- HARDWARE MARKET*
  - Antennas
  - Pico cells
  - Server units
  - Modems
  - Wireless access points

*Revenues, unit shipments and average selling prices

MARKET SHARES

- Airlines
- Service providers
- Hardware vendors

WHAT YOU RECEIVE – KEY POINTS

- 250 pages of quantitative and qualitative analysis giving rich insight
- A dedicated write-up of the complex regulatory environment in all three markets
- Connected aircraft forecasts out to 2028, alongside robust justifications
- Full overview of the competitive environment and market trends
- 41 in-depth profiles of key companies involved in the provision of IFC in all three markets
- Dedicated analyst time from the author to answer questions you have on the study
- PDF report and Excel tables, plus an invite to an exclusive summary webinar
EXAMPLE TABLES AND CHARTS

Example Table 1
Market for Connected Aircraft in Mainland China by Frequency Band: Forecast (2018 - 2028)
Installed Base at Year End

<table>
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<tr>
<td>L-band Satellite</td>
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<td>6%</td>
<td>7%</td>
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<td>Ku-band Satellite</td>
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<td>4%</td>
<td>7%</td>
<td>8%</td>
<td>9%</td>
<td>10%</td>
<td>11%</td>
<td>12%</td>
<td>13%</td>
<td>14%</td>
<td>15%</td>
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<tr>
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<td>13%</td>
<td>14%</td>
<td>15%</td>
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Total: 14 20 25 30 35 40 45 50 55 60 65 5%
Annual Growth: 1% 2% 3% 4% 5% 6% 7% 8% 9% 10%

Source: Valour Consultancy
June 2019

Example Table 2
Market for Connected Aircraft in China by Route Type: Forecast (2018 - 2028)
Installed Base at Year End

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<tr>
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<td>2%</td>
<td>3%</td>
<td>4%</td>
<td>5%</td>
<td>6%</td>
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<td>Operating Within India and Abroad</td>
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<td>11%</td>
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<td>13%</td>
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</tbody>
</table>

Total: 2 5 7 9 11 13 15 17 19 21 23 52%
Annual Growth: 1% 2% 3% 4% 5% 6% 7% 9% 9%

Source: Valour Consultancy
June 2019

Example Chart 1
Total Connected Aircraft in China (Inc. Taiwan and Hong Kong) by Aircraft Type
Connected Aircraft - 2018 to 2028

Source: Valour Consultancy
June 2019
ABOUT VALOUR CONSULTANCY

Valour Consultancy is a UK-based provider of market intelligence services. Founded in 2012, the company has grown rapidly and is renowned for the extremely high-quality of its research and consultancy. Having firmly established itself in the aviation space, where many of the leading players rely on its expert insight and analysis, Valour Consultancy has successfully expanded into a number of other markets including, maritime, industrial, drones and body-worn cameras.

The company’s aim is to deliver solutions that deliver real value and it continues to operate with the three core values it was founded on – Honesty, Trust and Time. As a result, Valour Consultancy continues to build long-lasting relationships.

What we offer:

• Syndicated research reports
• Custom research and consulting
• Whitepapers
• Survey design and analysis
• Databases and tracker products
• Public speaking, panel discussions and webinars

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<th>License</th>
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Position: __________________________
Company: __________________________
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Email: ____________________________
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