

A woman wearing a wide-brimmed hat and a light-colored jacket is shown in profile, looking down at a map she is holding in her hands. The background is a blurred, blue-tinted image of what appears to be an airport or travel setting. The entire image has a strong blue color cast.

The 2018 Global Traveler Research Study

A look at global air traveler
expectations, preferences,
and behaviors



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Alyssa Hayes
Director
Global Insights



Aaron Bullock
Manager
Global Insights

LIFT NOTE

Throughout the study, you'll find our personal insights on the data and ideas on how to leverage it for your airline.



Dear Airline Professional,

Every day, in every corner of the world, aviation professionals spend countless hours thinking of new ways to carve out market share in an increasingly competitive industry where passengers demonstrate less brand loyalty than ever before.

At Gogo, we're here to help you keep pace with traveler expectations and preferences around inflight internet—a vital and growing consideration in the overall passenger experience offering. Today, a full 30% of air travelers consider internet availability to be important when booking a flight.

The 2018 Gogo Global Traveler Research Study explores the changing behaviors of airline passengers across the world. The study has been significantly expanded since last year and now includes data gathered from more than 9,000 air travelers in 18 countries across the globe.

The study is comprised of three sections. First, we look at air traveler attitudes and aspirations around inflight connectivity, internet availability and device preferences. Next, we dig deeper into the five key passenger generations traveling today. Finally, we take a snapshot of five regions to highlight any nuances that may impact the passenger experience.

The Gogo team knows what it's like to be immersed in the world of the air traveler. Our focus every day is to improve the passenger experience through high-quality inflight internet. Ultimately, our goal with this study is to provide you with both useful data and educated insights that may spark a key learning or a new way to think about your business and your customers—all so you can create an inflight internet experience that meets the rapidly changing expectations of today's tech-savvy travelers.

THE CHALLENGE TODAY

How do airlines bring back passengers?

Creating and sustaining a loyal passenger base has never been a simple endeavor. Today, the data suggests it's more challenging than ever to keep passengers coming back.

Last year, 85% of global travelers reported that they had a preferred airline. One year later, the number has decreased to 81%.

In addition, 53% of today's travelers do not have a frequent flyer membership. That's 9% fewer frequent flyer members than the previous year. More than half (57%) of global travelers give ALL airlines equal consideration when booking a flight, despite the rewards they might earn.

There are many reasons for this erosion in passenger loyalty.

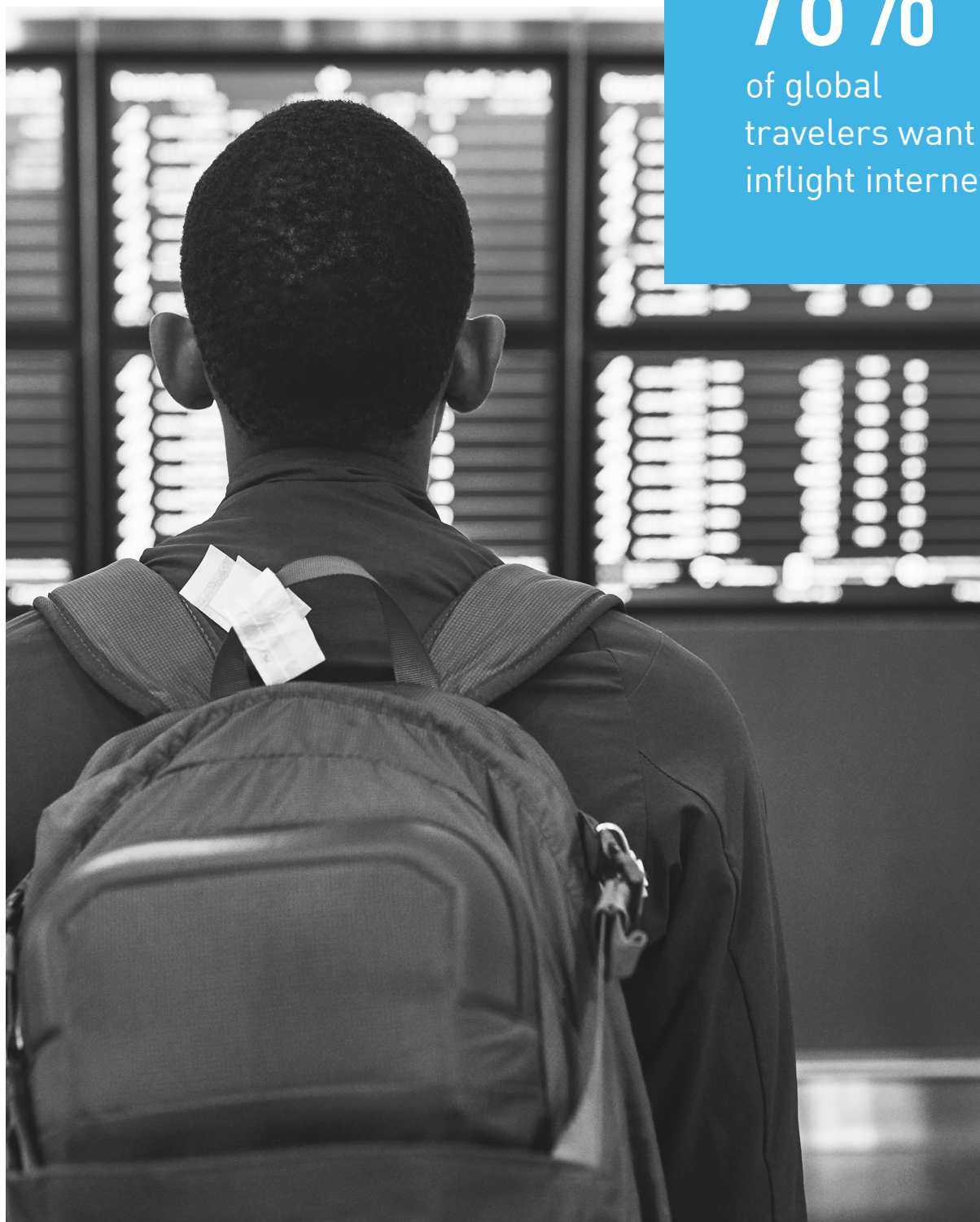
Consider the proliferation of carriers all vying for the same travelers. Or the rising influence of social media, where buying decisions can be influenced on an hourly basis.

Making things more difficult for airlines is the fact that the two most important criteria travelers cite for choosing a flight—price and convenient schedule—are core to the business strategy, and not easily changed without significant bottom-line and operational impact.

Airlines must look at new ways to build loyalty beyond price and schedule. The changing expectations of today's passengers creates new opportunities for airlines to anticipate and deliver new experiences and amenities, including inflight internet.

78%

of global
travelers want
inflight internet.



30% of global travelers look for inflight internet availability when booking their flight.

LIFT NOTE

Adding inflight internet can have an impact even before passengers connect. Of the highest-rated booking considerations, inflight internet is the only one that can be changed without altering an airline's core business strategy.



While price and flight schedule remain the most important considerations when booking a flight, the availability of inflight internet is now number seven on the list—up two positions from last year.

Inflight internet is now more important in the decision-making criteria of prospective passengers than traditional amenities like earning frequent flyer miles, availability of preferred seat class,

and availability of movies or TV shows on seatback screens.

Interestingly, while a full 55% of travelers consider inflight internet necessary on all flights, only 33% have used it in the past 12 months. This gap suggests that most air travelers view connectivity as an expectation, rather than a luxury. If passengers want to go online at some point during the flight, many expect internet to be available.

Top 10 considerations when booking a flight

1	Price	78%
2	Convenient schedule	69%
3	Comfortable seats	58%
4	Low or no fees	49%
5	Inflight meals	37%
6	Preferred airline	33%
7	Inflight Wi-Fi	30%
8	Frequent Flyer miles earned	27%
9	Movies or TV shows on seatback	24%
10	Preferred seat class	23%

Travelers want to stay connected to life on the ground.

It's no secret that people are more dependent on the internet than ever. Whether it's communicating with friends, family and business colleagues; watching news or sports; checking email; and, of course, booking a flight, we all conduct a multitude of important activities online every day.

This reliance on the internet in our daily lives means more airline passengers than ever are

unwilling to go without connectivity when they fly. It goes beyond passing time in flight. Travelers seek the ongoing connection to their life on the ground to relieve the tension of flying. Inflight internet keeps them on top of their daily routines, what's happening with their social groups, and in touch with work.

The result? Greater peace of mind and a more enjoyable overall flying experience.

77% of travelers say inflight internet makes them feel less anxious because they can stay in contact with friends and family.

65% of travelers say inflight internet makes them feel less anxious because they can stay in contact with work.



Travelers want to go beyond browsing.

Just as air travelers want to stay connected to life on the ground, most expect to tap into all the internet offers while flying. Rather than simple messaging or general browsing, passengers want a complete internet experience like they would enjoy at home or in the office.

For passengers, inflight internet must offer the full spectrum of online possibilities. For example,

three out of four (74%) consider messaging via a messaging app to be necessary on some flights. But that's just part of the offering since a full 96% of inflight internet users performed other tasks in flight.

Personalization is vital

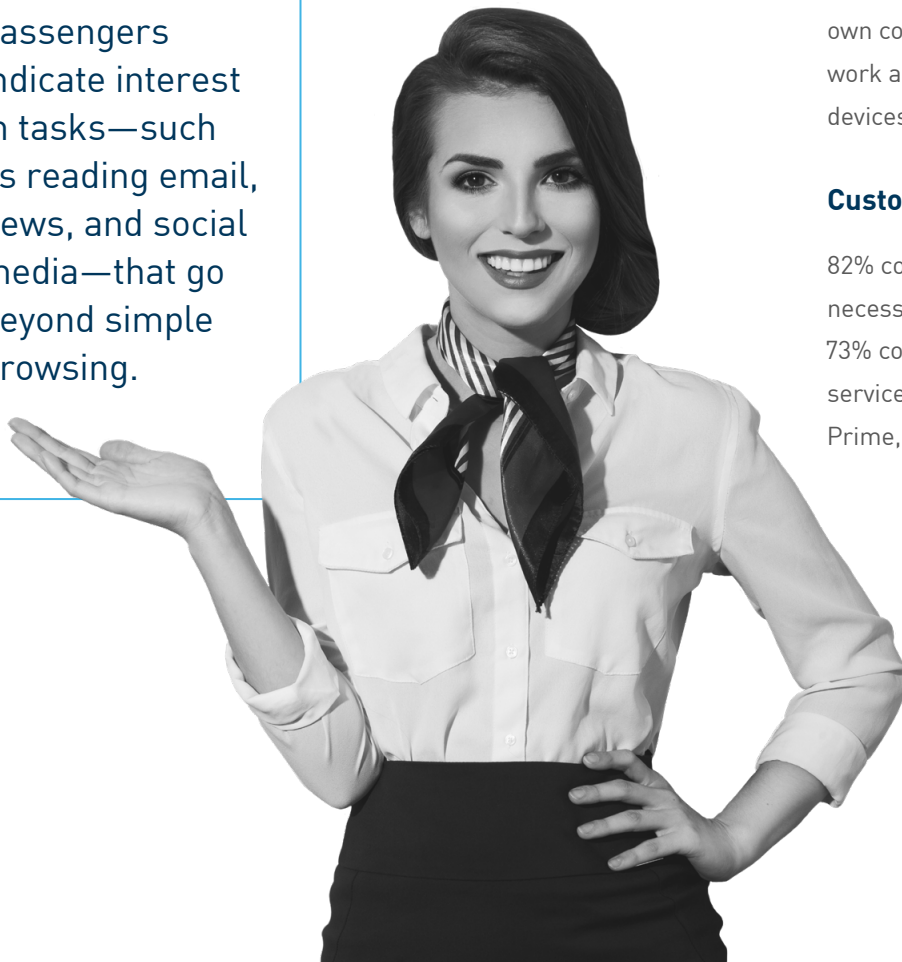
Nine in ten (92%) passengers are interested in personalized amenities in flight (such as ordering food, tracking luggage, or viewing live flight connection information). Passengers also want to view their own content, use their favorite work apps, and use their preferred devices to access the internet.

Customized content soars

82% consider live TV to be necessary on some flights, while 73% consider online streaming services (Netflix, Hulu, Amazon Prime, etc.) to be necessary.

9 IN 10

passengers indicate interest in tasks—such as reading email, news, and social media—that go beyond simple browsing.





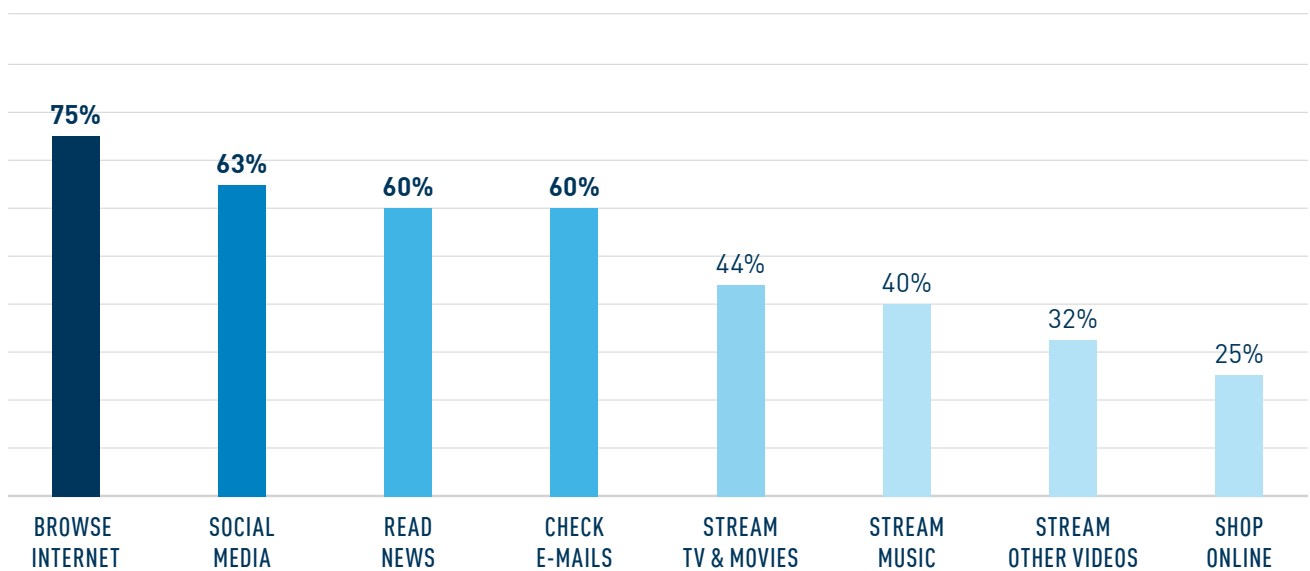
94%

of travelers feel
that inflight internet
would enhance their
travel experience.

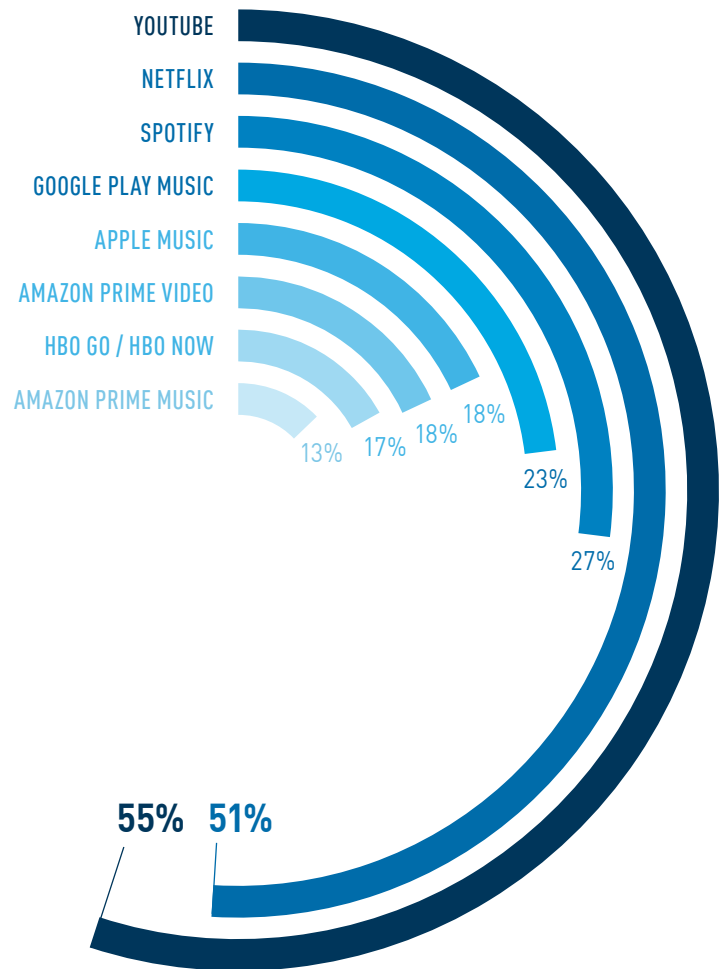
How are travelers using inflight internet?

33% of air travelers have used inflight internet in the past 12 months. Here's a look at the many activities these passengers expect to do while connected in flight.

Expectations for inflight internet



What would passengers want to stream in flight?



Travelers expect to use all kinds of devices...

LIFT NOTE

Considering the number of different devices and the potential to use multiple devices in flight, airlines should strive for a device-agnostic inflight experience.

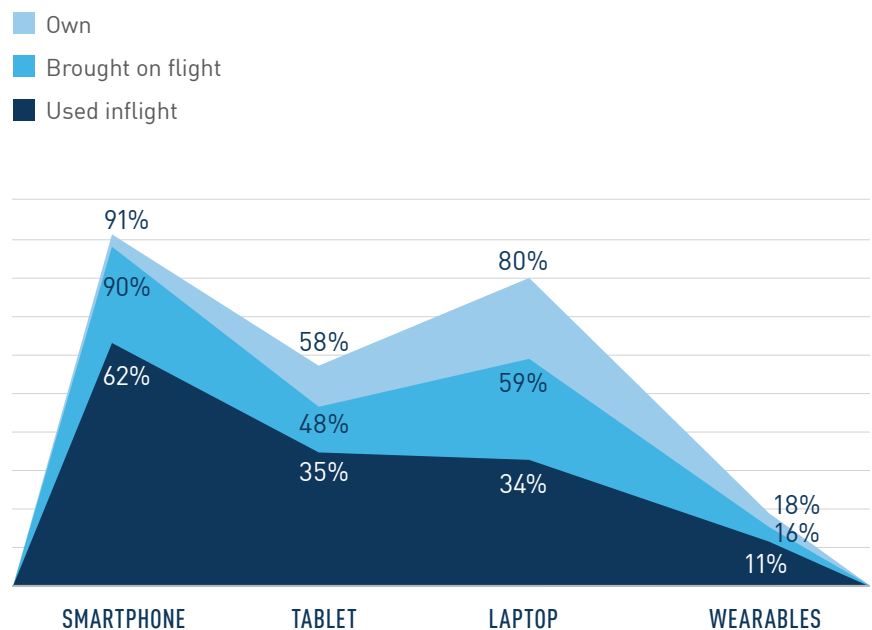


Virtually everyone who steps on board a commercial airplane anywhere in the world brings with them a smartphone. More than half (62%) use their smartphone in flight. This represents the greatest potential share of internet connectivity users on the airplane.

But these passengers have other device options as well.

Laptops, tablets, and wearables are also brought on board and used by passengers across all age groups. On average, global travelers bring 2.8 devices on board the airplane.

Device usage in flight



...But seatbacks aren't going anywhere.

LIFT NOTE

Both seatback and personal devices will remain viable choices for air travelers. The key to increased take rates is ensuring a personalized passenger experience on both seatback and personal devices—as well as providing sufficient bandwidth to accommodate all passenger preferences.



Despite the surging popularity of personal devices—particularly among younger air travelers—the familiar seatback screen remains the most popular way to access inflight entertainment.

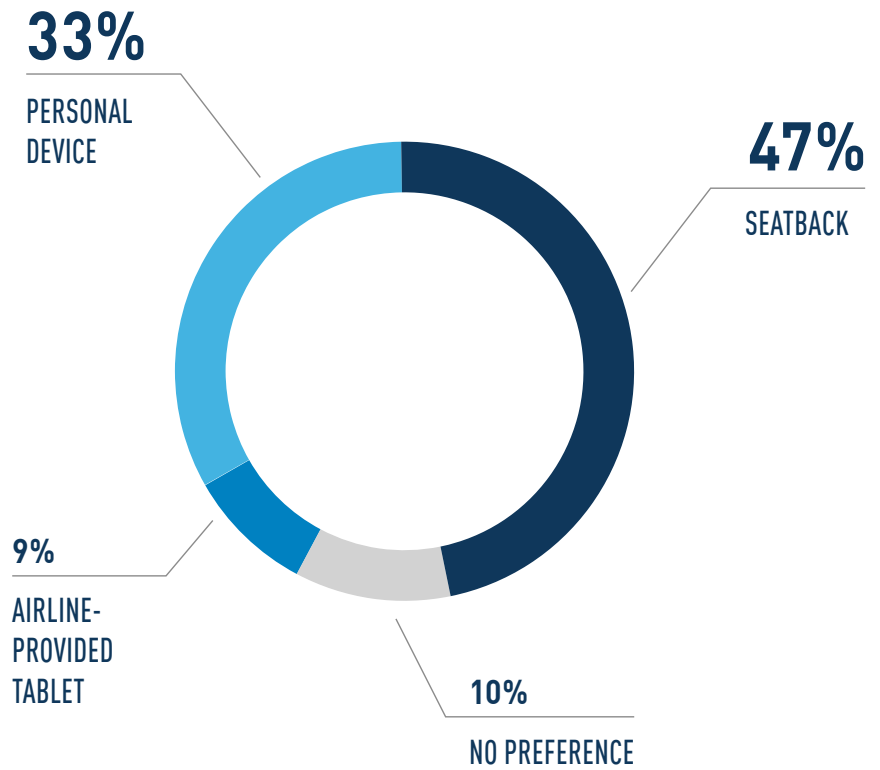
Half (47%) of air travelers prefer seatback screens in flight versus 33% who prefer their own personal devices including smartphones, laptops, or tablets.

To air travelers worldwide, both personal devices and seatback screens offer benefits.

In addition, when looking at the personal device versus seatback question, it is interesting to note the differences between regions and age groups on the following pages.



Passenger device preferences



Top reasons passengers prefer Personal Devices

It's more private	65%
Can access preferred shows	52%
Can use preferred language	43%
Fewer technical issues	35%

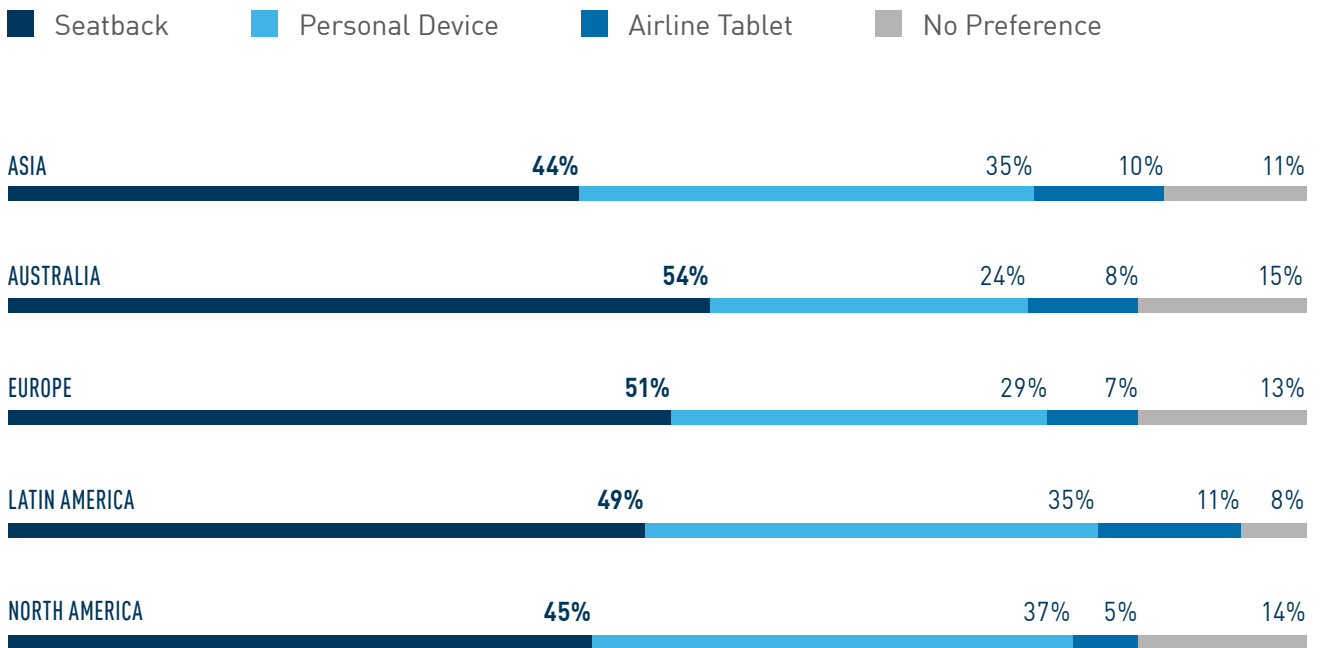
Top reasons passengers prefer Seatback

Don't have to charge my device	59%
Don't have to remember to download movies or TV	50%
Don't have to download an airline app	47%
Able to use my personal device at the same time	41%

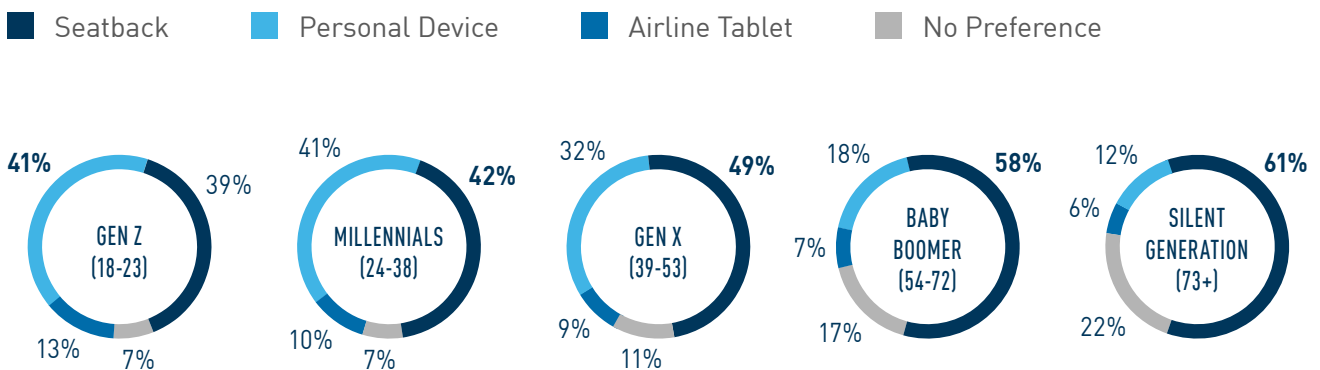
Seatback is preferred in Europe and Australia, and by older travelers; while Gen Z and Millennials—the two youngest demographic groups—would rather use their own devices.

Presumably it's because these groups consist mainly of digital natives who have grown up using devices for everything from entertainment to school to work.

Passenger device preferences by region



Passenger device preferences by generation



Multi-tasking is an expectation in flight.

LIFT NOTE

Multitasking behaviors will continue to evolve as connectivity becomes more common. Passengers will want to mirror their ground experience – using one screen to watch a video and another to surf the web and do work tasks. Creating a digital ecosystem that can support these behaviors will be important.

For many passengers, inflight entertainment can be a highlight of the flight. 81% of air travelers say they enjoy using the inflight entertainment systems on airplanes. Another 20% of flyers report that they use their time onboard to get work done.

In reality, these groups overlap. Multitasking in flight is the

expectation, just as it is at home or at work. People are comfortable watching a movie on the seatback while texting colleagues on their smartphone. Or enjoying their favorite TV show on a laptop while helping their child play an online game on a personal tablet.

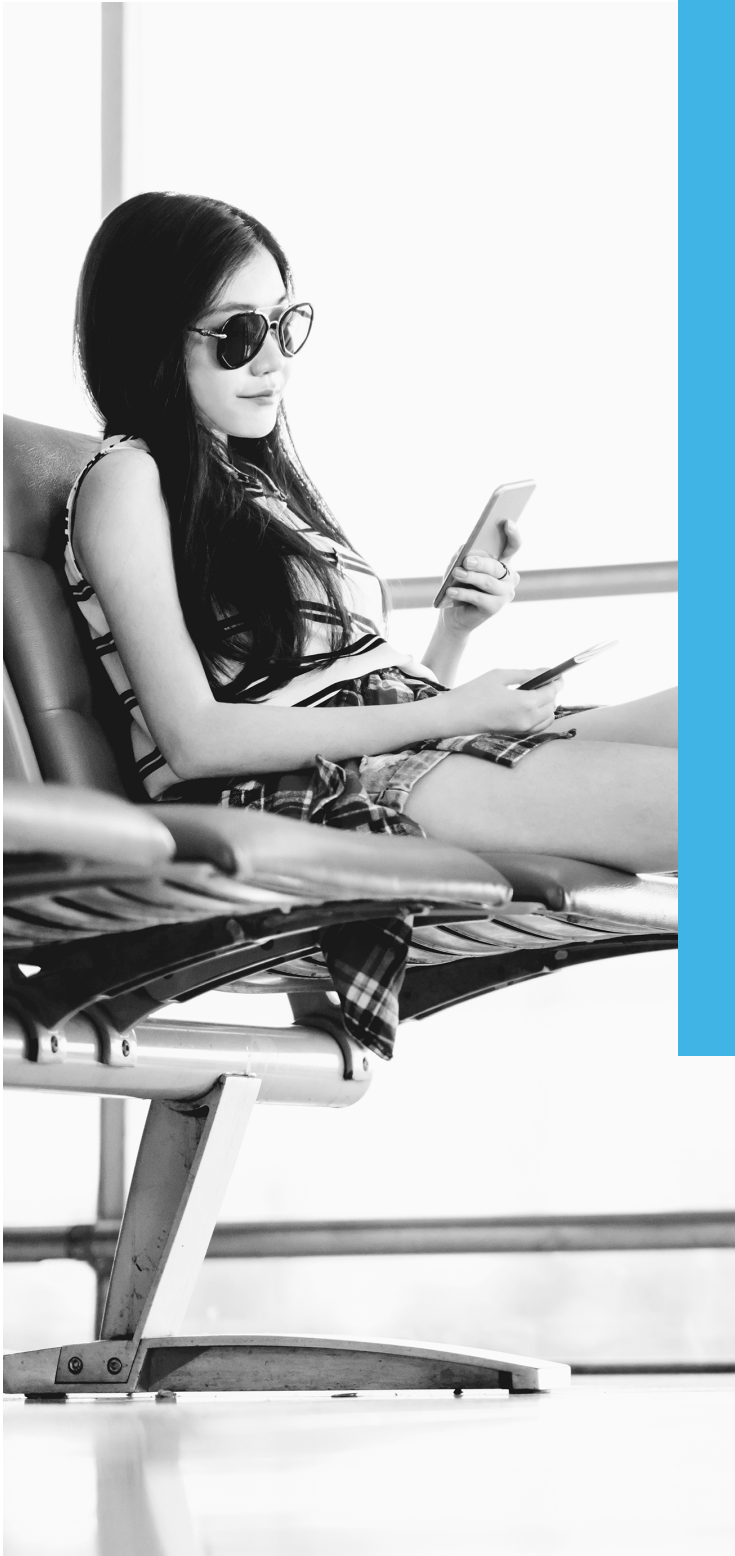




Who is traveling today?

In this section, we break down today's global air travelers into five age-based groups. These include the youngest travelers, Gen Z; the Millennials who are now flying in earnest; Gen X; Baby Boomers; and the Silent Generation of older passengers.

Each group has distinct requirements and expectations when booking a seat, including how they consume inflight internet. Understanding these nuances is critical for airlines when it comes to crafting and controlling the optimal passenger experience.



Gen Z

Ages 18 to 23

Gen Z is comprised of the world's youngest and least experienced flyers. However, when it comes to inflight internet, this group already has assumptions about entertainment, personal device usage, and streaming at 30,000 feet.

- › Less likely than other age groups to consider flight schedule to be most important
- › Less likely than other age groups to have a frequent flyer membership
- › Less likely than other age groups to "prefer to entertain myself with whatever entertainment is offered inflight"
- › More likely to use smartphone inflight
- › More likely to prefer personal devices over seatback
- › More likely to expect to be able to stream
- › More likely not to feel anxious if connected

LIFT NOTE

This generation has never known a world without cell phones and constant connection to the internet. As such, their take on air travel and staying connected is unique. To win this group, airlines should focus on solutions that allow these passengers to thrive within their native environment, their mobile devices, and using their apps. This group would likely find wireless content streaming and streaming over Wi-Fi (YouTube, Netflix, and Hulu) appealing.





Millennials

Ages 24 to 38

This generation is all grown up. They fly more often, and frequently for business. Interestingly, while this group is living adult lives—complete with families, homes and careers—they retain their youthful consumption of video content.

- › Millennials go on more flights than other groups
- › Fly more for business
- › Less likely than other age groups to have a preferred airline
- › More likely to have wearable devices
- › More likely to subscribe to any streaming video or music source
- › More likely to expect inflight internet to allow streaming video
- › More likely to look forward to inflight entertainment on the airplane
- › More likely to be loyal and recommend an airline that offers high-quality inflight internet

LIFT NOTE

Putting more Millennials in seats means having a solid connectivity strategy. Inflight internet will have the greatest impact on this generation, but they also have the highest expectations for the service. Other technology innovations—such as alerts on wearables or a seamless, connected travel experience—would likely resonate well with this group given their heavy adoption of the technology.





Gen X

Ages 39 to 53

Gen X consists of air travelers who strive to achieve a work-life balance. However, its members fly more for business than for personal reasons. This group is focused on price and expect a good value for their inflight expenditures.

- › More likely to use a tablet
- › More likely to use Android
- › More likely to give all airlines equal consideration when booking
- › Preferred airline plays a bigger role when booking a flight
- › Fly the least for personal reasons

LIFT NOTE

This generation is more cautious around spending money and more concerned where their money is going than previous generations. They are loyal to airlines who provide them with the most value. Offering amenities that add value to the passenger experience without impacting the bottom line, or continuing to offer unique perks for loyalty and ticket tiers should be considered to maintain and strengthen the loyalty of this generation.





Baby Boomers

Ages 54 to 72

Unlike Gen Z or Millennials, the Baby Boomer generation has not fully embraced technology—and likely never will. Their expectations for inflight entertainment are straightforward.

- › More likely than other age groups to have a preferred airline
- › Lower device usage on planes
- › Preference for seatback
- › Fly more for personal reasons rather than business

LIFT NOTE

To win this group, airlines should provide entertainment solutions that offer simple, familiar access. This group would likely engage better with seatback screens. Additionally, a wider selection of movie and TV shows targeting this generation would likely be more appealing for this group than adding streaming or live TV.





Silent Generation

Ages 73 and over

The most senior group of air travelers is the Silent Generation. These passengers travel almost exclusively for leisure, whether it's as a tourist or to visit family and friends.

- › More concerned with convenience (flight schedule and seats) than other groups
- › More likely to look at one or two airlines when booking
- › More likely to use a mobile phone that's not a smartphone
- › Less interested in all types of inflight entertainment, but would prefer seatback over a personal device

LIFT NOTE

This group is set in their ways. They have their preferences and stick to them. Airline choice is no exception. Their attitudes about flying are likely shaped by past experiences when today's inflight options were not yet available. As such, they typically look for more traditional comfort amenities like snacks and drinks.

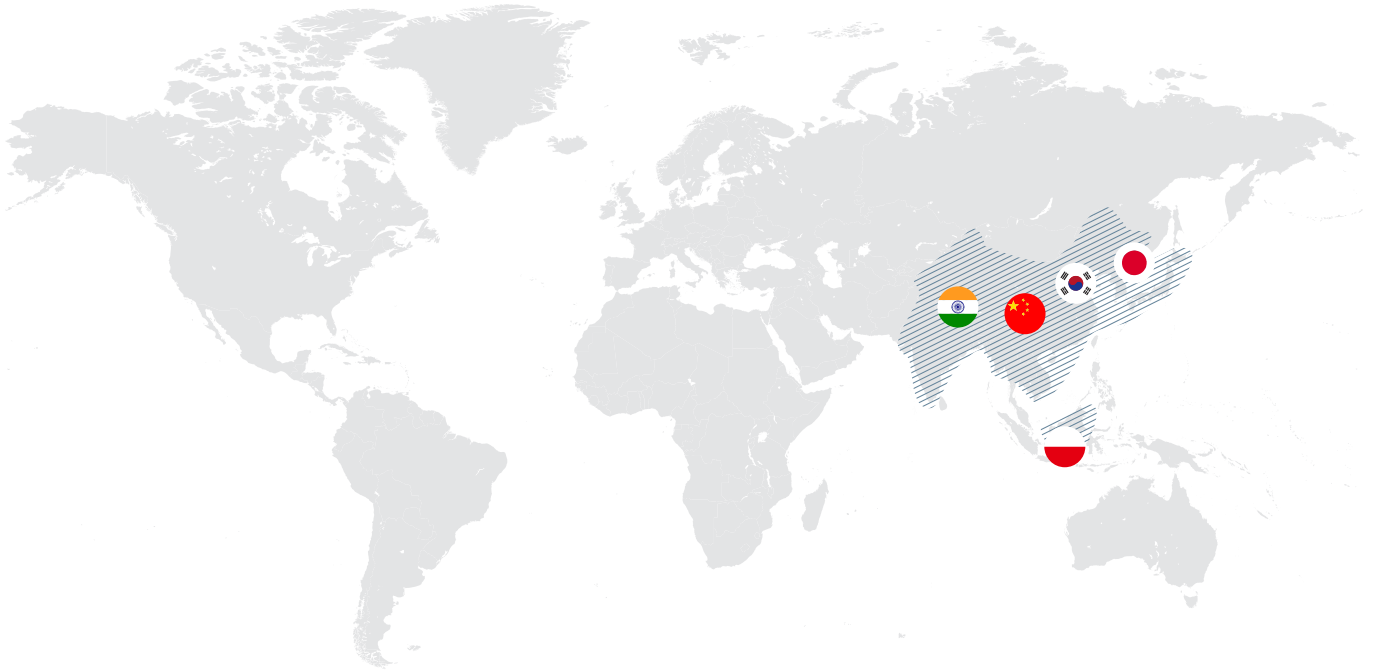






A global snapshot

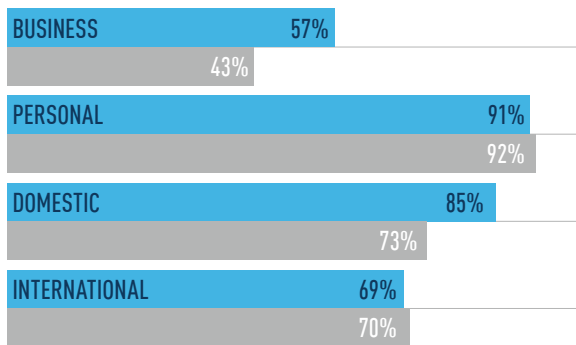
In building a more loyal customer base, airlines must not only account for who their passengers are, but where these passengers are from. The destinations, average number of flights per year, and reasons for flying all vary significantly from one region to another.

In this section, we look at how geography impacts passenger flying habits and preferences, including responses from air travelers in Asia, Australia, Europe, Latin America, and North America.



Types of flights

Asia 
Global 



AVERAGE NUMBER OF FLIGHTS



LIFT NOTE

To engage with travelers in this region, airlines should focus marketing efforts of any inflight internet solution on how it can keep them connected to family, friends, and work. Travelers here are considerably more concerned with staying connected than travelers of other regions and look to be productive when traveling. Additionally, travelers in this region have the highest expectations for inflight internet so a high quality inflight internet system is particularly important.



Asia

*COUNTRIES INCLUDE
CHINA, INDIA, INDONESIA,
JAPAN, SOUTH KOREA*

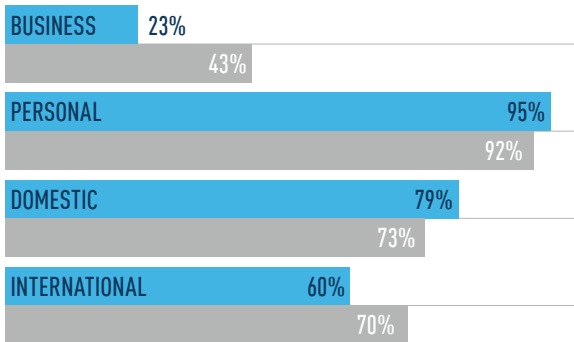
Notes on Asian air travelers

- > Asian travelers take more flights per year than any other regional travelers
- > They fly more for business
- > More likely to travel domestically since their countries are large and may have geographic barriers such as oceans
- > Less likely to consider flight price important when booking; these travelers are more concerned with schedules and seats
- > They have higher expectations for inflight internet
- > Enjoy how inflight internet helps them stay in contact with family
- > More likely to be energized by traveling



Types of flights

Australia 
Global 



AVERAGE NUMBER OF FLIGHTS



LIFT NOTE

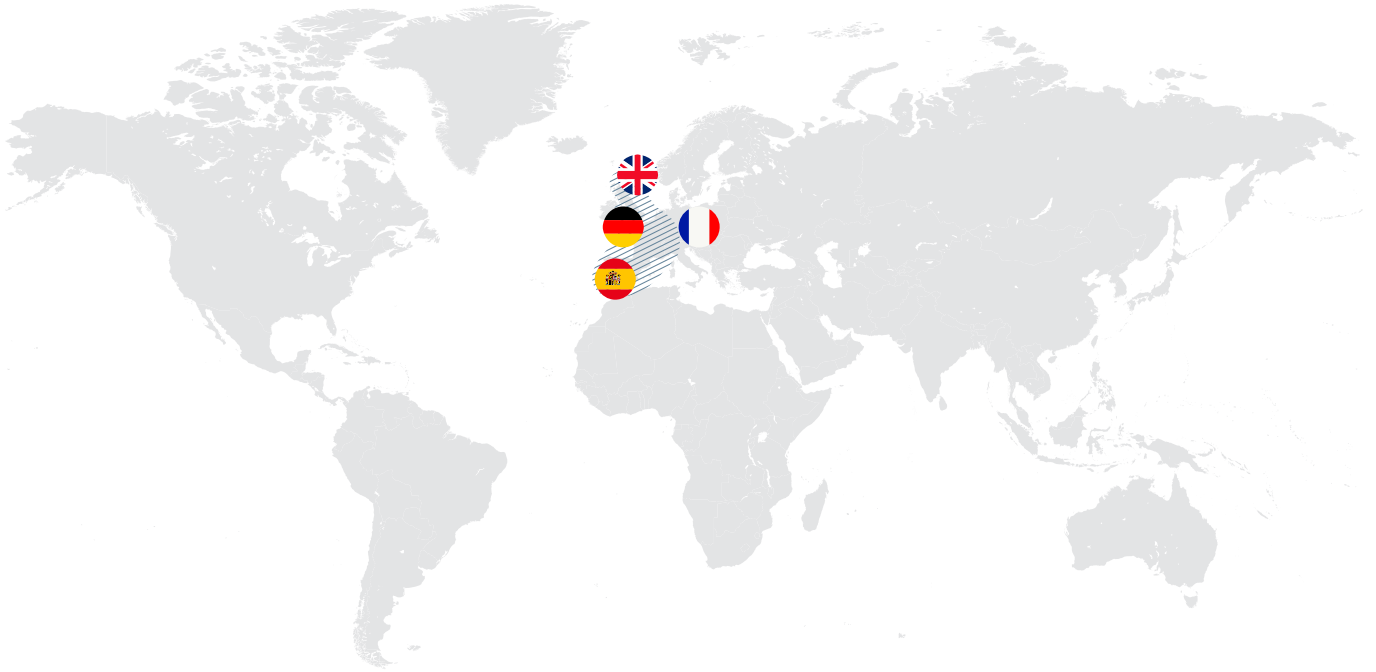
Australian air travelers tend to travel more often for leisure and use their time on the plane to relax. As such, flyers in this region are less likely to use an electronic device on the plane. To win them, airlines should focus on engaging passengers with exciting seatback offerings. We know that this group already boasts the highest rate of seatback screen usage globally, adding innovative features like live TV or streaming services (Netflix Australia, Stan, Foxtel Now, etc.) could be particularly appealing.



Australia

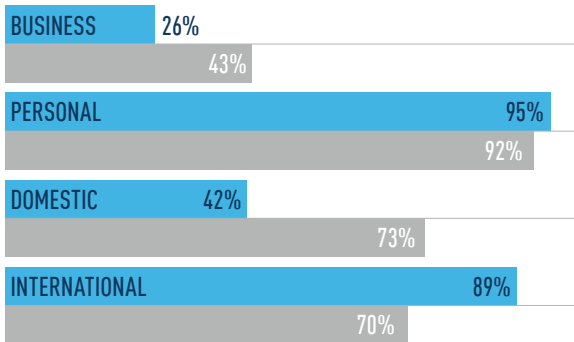
Notes on Australian air travelers

- > Australian travelers tend to fly much more for personal trips
- > They are more likely to be frequent flyer members
- > They are less likely to bring a device on board
- > They prefer to use Apple iOS
- > They are not as concerned with airline amenities
- > They have higher rates of seatback usage and are more interested in their seatback screen



Types of flights

Europe 
Global 



AVERAGE NUMBER OF FLIGHTS



LIFT NOTE

Preferences of flyers in Europe are quite different from those of any other region in the world. This might be a result of smaller geographical borders, well maintained transportation infrastructure, and the general standard of living in Europe. Travelers from this region are more likely to consider themselves to be travel experts but less likely to be loyal to an airline. To win this group, airlines should strive for a seamless, ground-like internet experience to capitalize on the shorter flights and maximize connectivity.



Europe

*COUNTRIES INCLUDE
FRANCE, GERMANY, SPAIN,
UNITED KINGDOM*

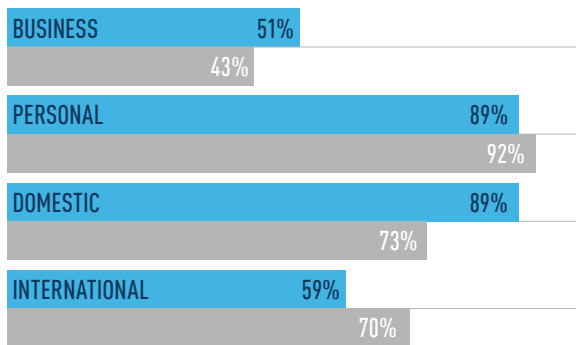
Notes on European air travelers

- > Europeans are less likely to have a frequent flyer membership
- > Less likely to have a preferred airline
- > More likely to consider themselves an expert traveler
- > Less likely to look at only one or two airlines when booking
- > More likely to fly between countries
- > Less likely to feel that movies, TV, and entertainment are necessary in flight
- > More travelers are interested in inflight internet rather than inflight entertainment



Types of flights

Latin America 
Global 



AVERAGE NUMBER OF FLIGHTS



LIFT NOTE

Latin American travelers want it all. They express a high level of interest in all forms of communication and entertainment in flight. They travel for a mix of business and leisure purposes, and staying connected to friends and family is important to them. Offering and supporting services that are device- and operating system-agnostic will be appealing for travelers in this region as they tend toward high device usage when in the air.

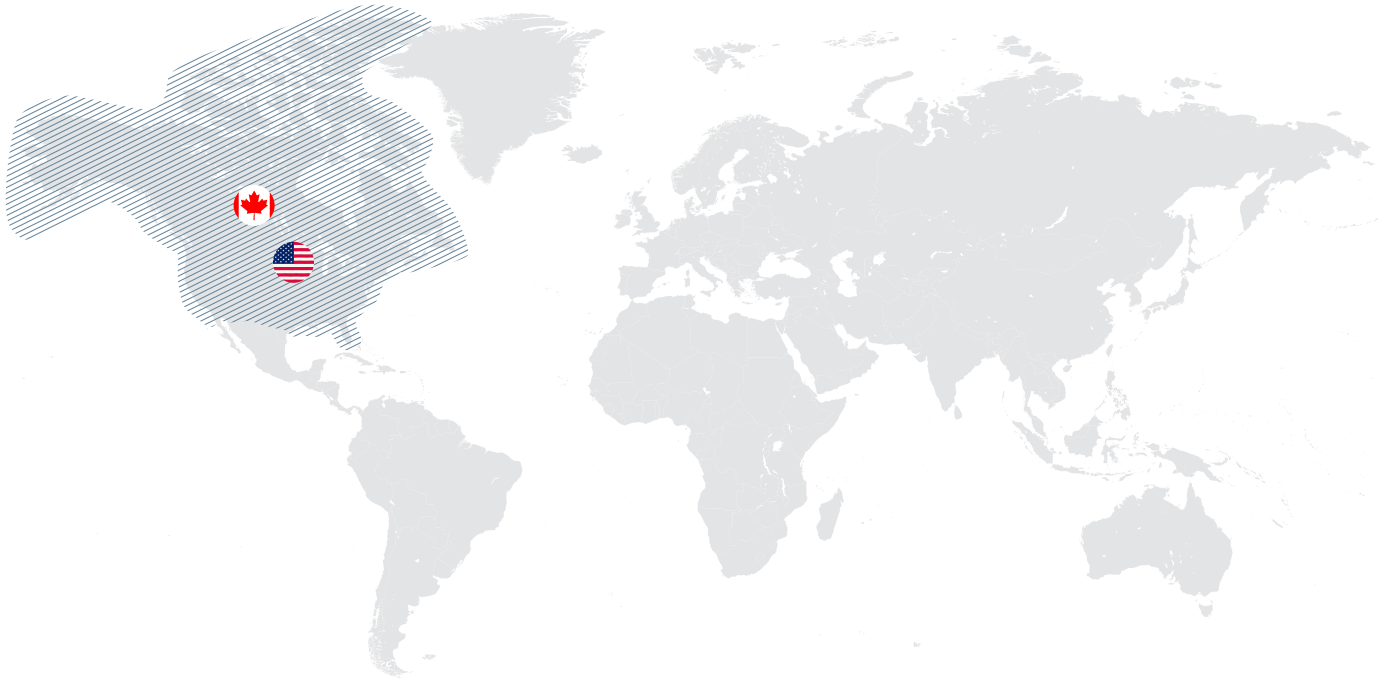


Latin America



*COUNTRIES INCLUDE
BRAZIL, CHILE,
COLOMBIA, MEXICO*

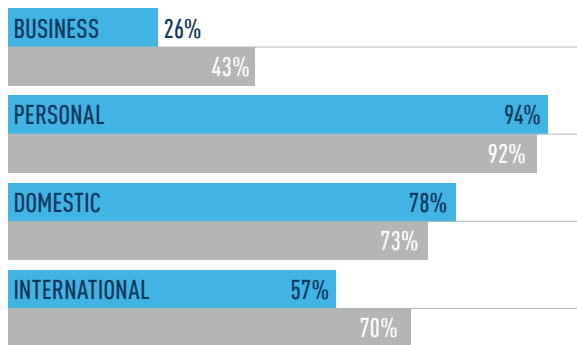
Notes on Latin American air travelers

- > They have greater interest in inflight internet
- > They have greater interest in staying connected (for example, texting, calling, and messaging)
- > They have greater interest in streaming Netflix and using in-seat power
- > Latin American travelers are less likely to use Apple iOS



Types of flights

North America 
Global 



AVERAGE NUMBER OF FLIGHTS



LIFT NOTE

Travelers in North America have concern over airline fees. Implementing an inflight solution with an innovative payment method (such as partnerships, advertising, etc.) could prove to be successful as travelers here demonstrate a clear interest in connectivity. Furthermore, this region's travelers look forward to entertainment on planes, but aren't necessarily satisfied with traditional inflight entertainment options and seatback screens. Streaming TV shows and videos (including from a subscription service) or live TV available on personal devices would be attractive.



North America

*COUNTRIES INCLUDE
CANADA AND
THE UNITED STATES*

Notes on North American air travelers

- > North Americans take the least amount of international trips
- > Care more about low or no fees
- > They have lower interest in any entertainment on the seatback screen
- > Less likely to say they look forward to inflight entertainment



Research methodology

Who

- › Travelers who have taken at least one flight in the past 12 months
- › Age 18 and above

How Many

- › Conducted in 18 countries around the world; including: Australia, Brazil, Canada, Chile, China, Colombia, France, Germany, India, Indonesia, Japan, Mexico, Spain, South Korea, Turkey, United Arab Emirates, United Kingdom, and the United States
- › 9,000 total respondents (approximately 500 per country)

What

- › 15-minute online survey

When

- › Data collection occurred during Q4 2017

All data was collected by Lieberman Research Worldwide, a full-service custom market research consultancy that conducts research in over 80 countries.

About Gogo

Gogo is the inflight internet company. We are the leading global provider of broadband connectivity products and services for aviation. We design and source innovative network solutions that connect aircraft to the internet, and develop software and platforms that enable customizable solutions for and by our aviation partners. Once connected, we provide industry-leading reliability around the world.

Our mission is to help aviation go farther by making planes fly smarter, airlines perform better, and passengers travel happier.

Gogo is headquartered in Chicago, Illinois, USA, with additional offices across the globe.

Learn more

Access more reports in the
Global Traveler Research Series at
gogoair.com/globaltraveler