

# US & International Inflight Wi-Fi

Air Travel Insights from Routehappy



# Overview: Flyers find more Wi-Fi than ever before

Flyers want to get online, and expect to find Internet on board. Routehappy, the flight search site that helps travelers find the happiest flights for the lowest price, used its unique database “Flightpad” to discover when flyers can count on Wi-Fi.

## Highlights:

- Flyers can count on Wi-Fi on 38% of domestic US flights, covering 44% of flight time.
- Routehappy analysis revealed that flyers will find “Wi-Fi when it’s worth it most” on 56% of Wi-Fi-enabled domestic flights in standard economy.
- Delta, Southwest and US Airways (in that order) have the most flights with Wi-Fi.
- Virgin America and AirTran excel at consistency, with 100% of the fleet Wi-Fi-enabled.
- By route, flights from LAX to SFO and JFK have the most Wi-Fi, with Atlanta-Orlando the third most connected US route.
- Full-flight international Wi-Fi is becoming a reality. 38 daily international flights from the US have full-flight Wi-Fi. A further 241 have a chance of Wi-Fi or cellular roaming.

Routehappy is a new breed of flight search site that differentiates air travel. Our unique Happiness Scores reveal flights with better planes, seats, amenities, and flyer ratings. Routehappy tracks a myriad of Happiness Factors that matter to flyers: over 60+ seat configurations, 25 seat types, 19 kinds of entertainment, 10+ in-seat power types, Wi-Fi, and more. [Routehappy.com](http://Routehappy.com)

Please attribute data to Routehappy, and quotes from this report to John Walton, Director of Data, who is also available for interview and further questions. Contact Kellie Pelletier, Director of PR & Communications, [kpelletier@routehappy.com](mailto:kpelletier@routehappy.com).

For data methodology, see final page.



# US Domestic Wi-Fi



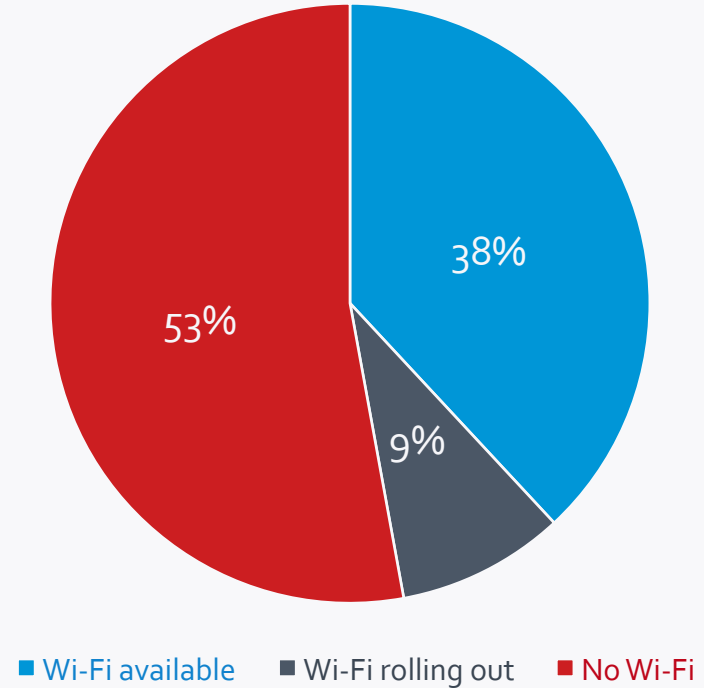
## Flyers can now count on Wi-Fi aboard 38% of US domestic flights.

In addition to the over 8,700 nonstop flights where flyers can count on Wi-Fi, a further 9% of flights (over 2,200) are a “maybe” for Wi-Fi — usually due to a rollout in progress on the aircraft fleet used for the flight. In these cases, flyers may or may not find Wi-Fi on board their particular flight.

Routehappy expects most current rollouts to be complete within 18-24 months. We also expect more rollouts to be announced, and for new planes with factory-fitted Wi-Fi to arrive.

In terms of hours flyers spend on the plane, Wi-Fi is available 44% of the time, indicating deployment of Wi-Fi is smartly weighted to aircraft serving longer flights.

Wi-Fi availability on US domestic flights



## Delta has the most domestic flights with Wi-Fi, with Southwest on its tail.

Delta, Southwest and US Airways offer the most domestic daily flights with Wi-Fi.

Major rollouts under way from American and United will also provide new options for passengers to get online.

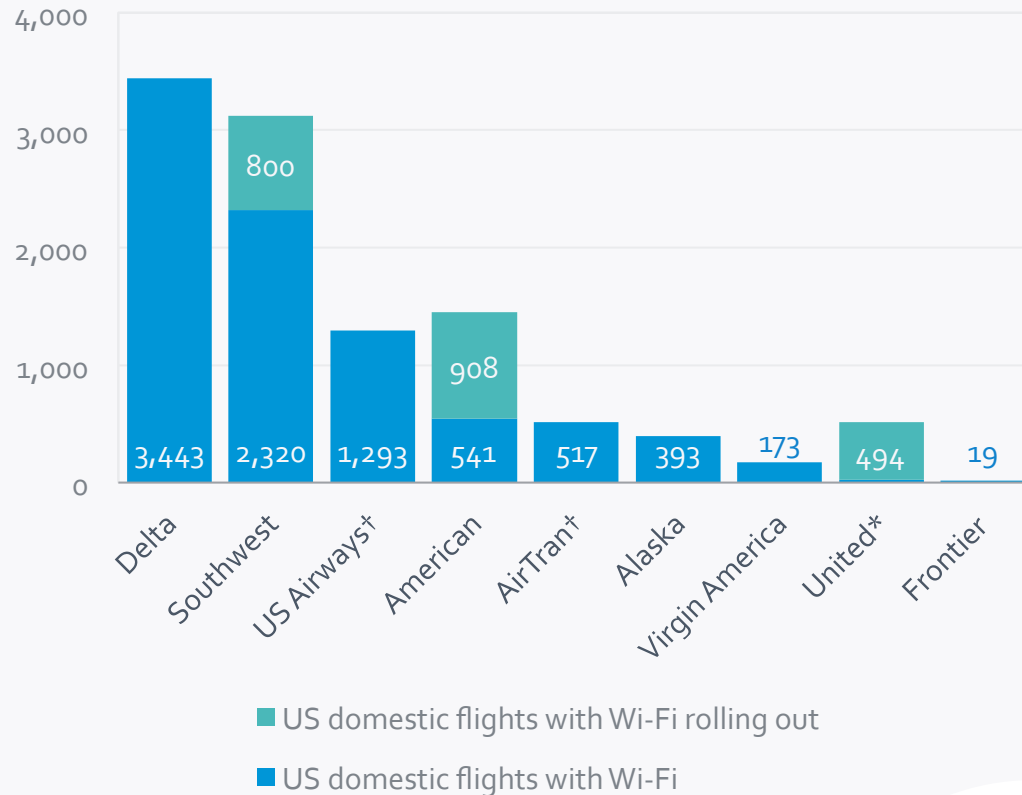
“Rolling out” means that Wi-Fi is currently being installed on the fleet of aircraft used for the flight, but is not yet offered on every plane.

*\*The 24 daily United p.s. transcontinental flights (JFK to LAX and SFO) all offer Wi-Fi, but are not labeled on this scale.*

*†US Airways and AirTran will become American and Southwest, respectively, upon merger completion.*

*New rollouts from United & jetBlue have been particularly affected by the extra FAA checks for satellite Wi-Fi certification.*

### Number of US domestic daily flights with Wi-Fi



## Virgin America and AirTran offer Wi-Fi consistently on every domestic flight.

Virgin America and AirTran lead the pack with 100% of domestic flights equipped with Wi-Fi.

Southwest is catching up, with 74% of planes Wi-Fi-enabled now and the remainder rolling out.

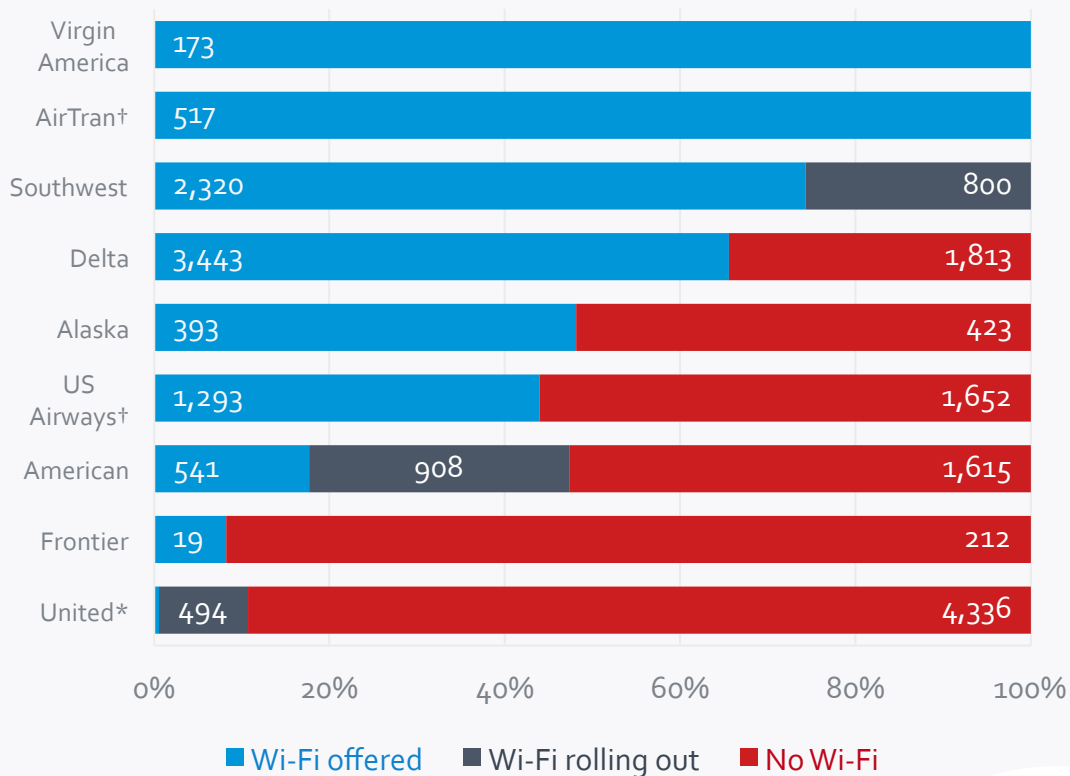
For Delta, most of the flights without Wi-Fi consists of regional jets used on flights under an hour.

Airlines like United and jetBlue with plans to roll out satellite Wi-Fi are awaiting FAA approval before proceeding with installations.

*\*The 24 daily United p.s. transcontinental flights (JFK to LAX and SFO) all offer Wi-Fi, but are not labeled on this scale.*

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### Proportion of US domestic daily flights with Wi-Fi



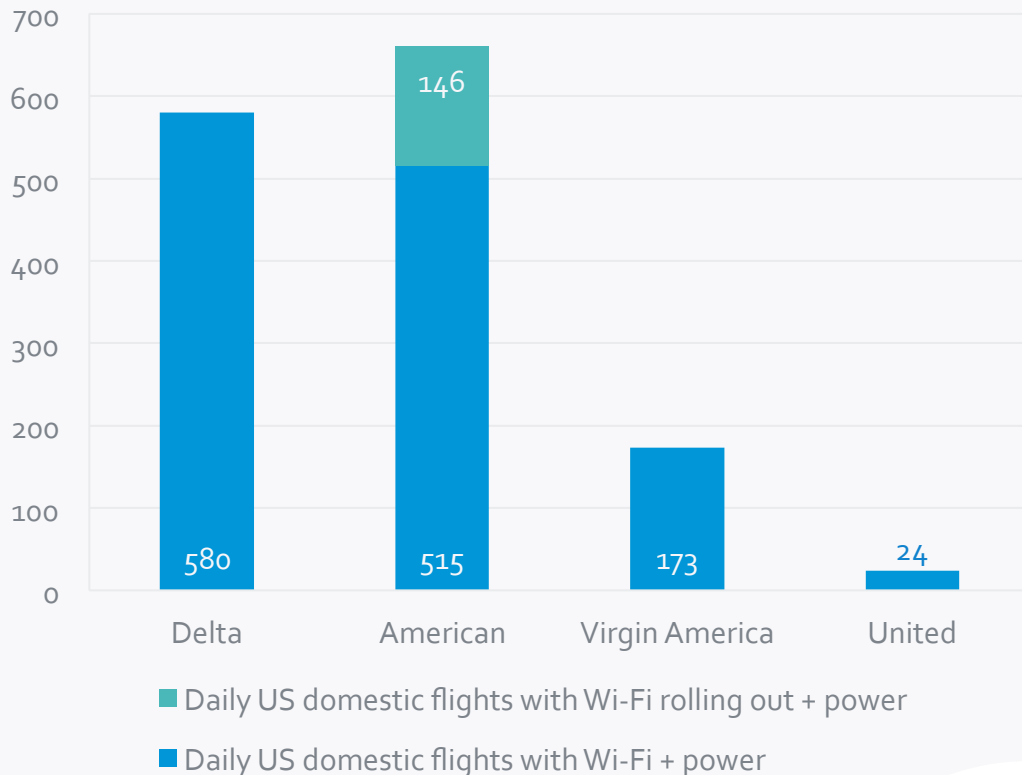
## Just four airlines offer the highest level of inflight productivity: in-seat power along with Wi-Fi.

Battery anxiety is a reality for today's flyer. If their phone, tablet or other device runs out of power, Wi-Fi isn't much use.

In economy, 100% of Virgin America flights and all United p.s. flights with Wi-Fi have power. Most American Airlines flights with Wi-Fi also have power (515 out of 541 Wi-Fi equipped flights).

Routehappy tracks over a dozen kinds of inflight power, and the flights shown on this page have AC power, USB ports or both. (Adapter power is not included.)

Number of US domestic daily flights with Wi-Fi and in-seat power



## LAX-SFO and LAX-JFK are the most connected routes in the US.

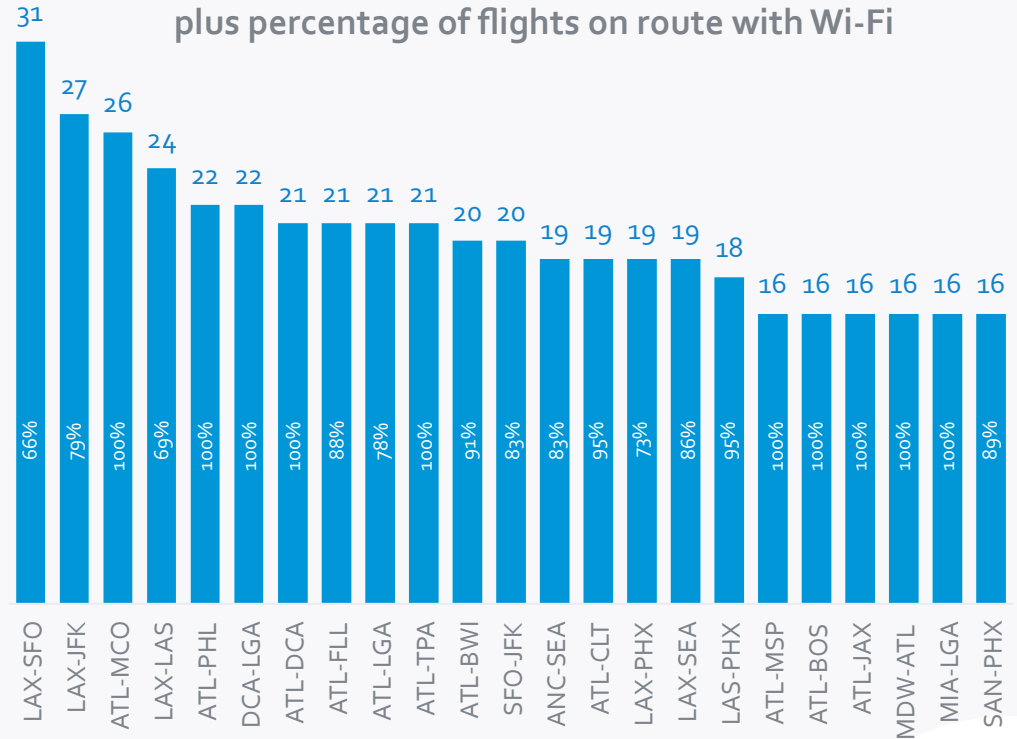
Atlanta flights have the most Wi-Fi, mainly because of Delta's Wi-Fi progress.

Transcontinental flights (California to New York in particular) are also highly connected, with around 80% of flights between JFK and SFO or LAX offering Wi-Fi.

While the LAX to SFO route has the most flights with Wi-Fi, a full third of flights on that route do not.

Similarly, over 20% of LAX-JFK flights do not have Wi-Fi — flyers need to choose carefully if they want Wi-Fi.

Daily US domestic flights with Wi-Fi, by route (more than 15 daily one-way non-stops) plus percentage of flights on route with Wi-Fi





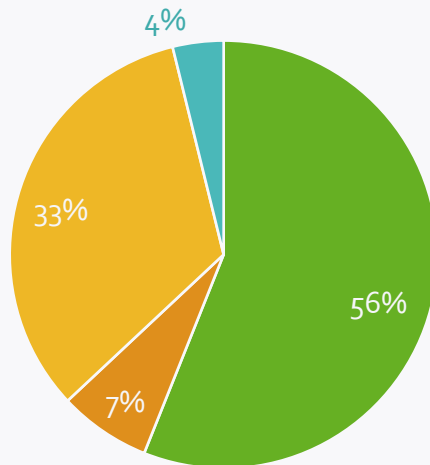
## When is Wi-Fi worth it the most? 56% of the time that it's offered in standard economy.

Routehappy's "Wi-Fi When It's Worth It" analysis reveals when flyers get the most value from Wi-Fi, on flights:

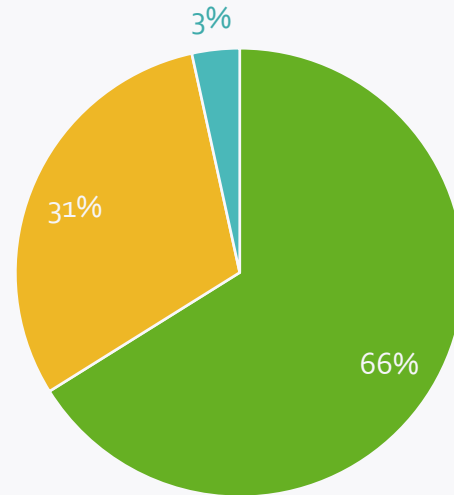
- in economy seats with over 30" of pitch between seats, where opening a laptop starts to be feasible
- over 500 miles, roughly an hour of flying time, since electronics (and Wi-Fi) need to be off for takeoff, descent and landing
- over 2000 miles, roughly four hours of flying time, with in-seat power (AC plug or USB port)

## US domestic daily flights with Wi-Fi When It's Worth It

Standard economy



Business & first class



- Wi-Fi is worth it for most passengers
- Tight seats: only worth it on a tablet or phone, not a laptop
- Short flight: under an hour's flying time
- Long flight, no plugs: worth it if batteries last

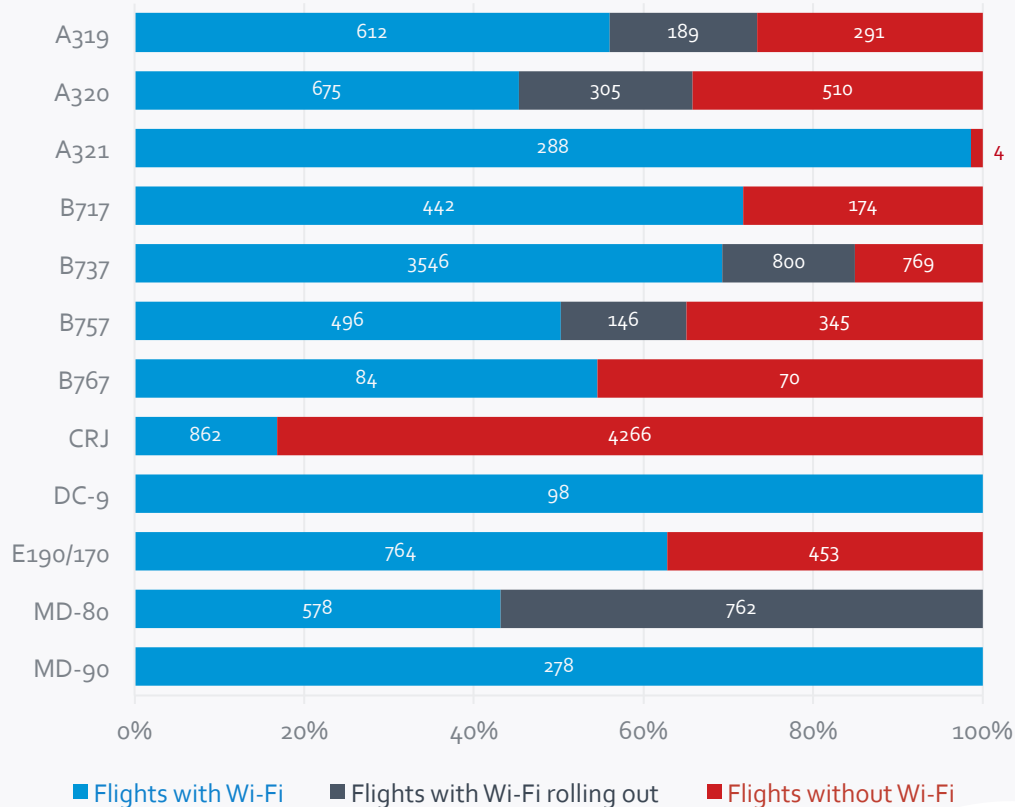
## Flights on Boeing 737 planes have the most Wi-Fi on offer.

It's no surprise that the most commonly flown planes in the country have the most Wi-Fi.

But flyers can be most certain that they'll have Wi-Fi when flying on the MD-90, A321 and even DC-9 planes from the 1970s.

By contrast, CRJ regional jets are the least likely to be equipped with Wi-Fi. By and large, though, these jets are used on shorter flights where Wi-Fi is less likely to be valued for most passengers.

### US domestic daily flights: Wi-Fi status, by aircraft type



## SkyTeam has the most US flights with Wi-Fi, but oneworld will catch up soon.

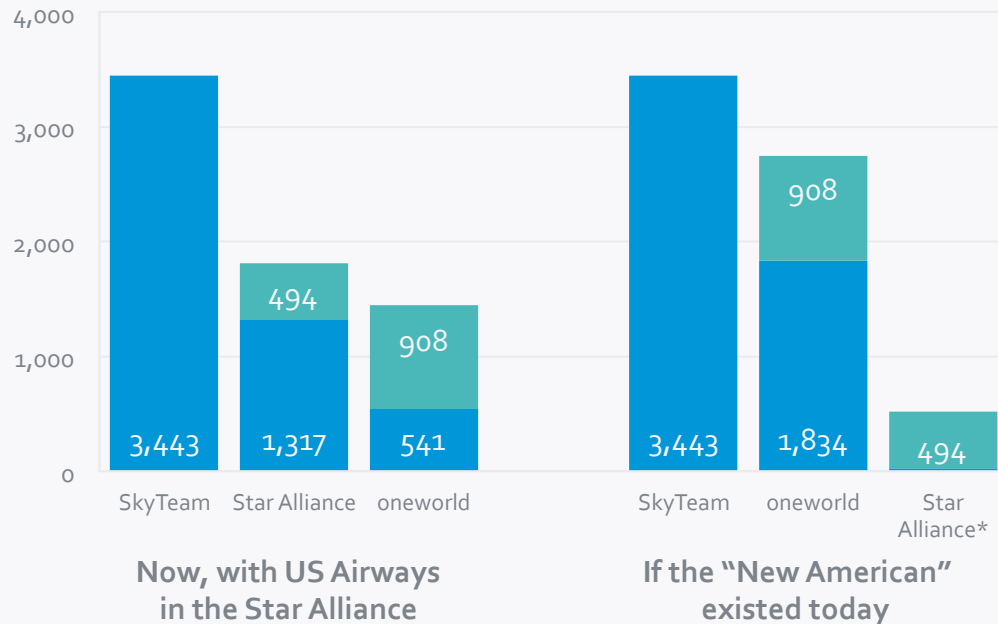
Frequent flyers, road warriors and miles junkies want to stay connected.

Within the US, SkyTeam is the alliance that lets them do that, with more US domestic flights certain to offer Wi-Fi than the other alliances put together.

The merger of American and US Airways into the new American will boost oneworld's Wi-Fi offerings.

*\*The 24 daily United p.s. transcontinental flights (JFK to LAX and SFO) all offer Wi-Fi, but are not labeled on this scale.*

### US domestic daily flights with Wi-Fi, by airline alliance





# International Wi-Fi from the US



# Overview: international Wi-Fi is becoming a reality

International Wi-Fi in 2013 is a complex situation, with many more shades of grey and different technical restrictions than domestic US connectivity.

This report includes flights that have full-flight connectivity, and excludes flights with only partial coverage for technical reasons (e.g., flights from the US to other North American destinations where coverage is limited to within 100-200 miles of the lower 48 states).

Even during full-flight connectivity, satellite Wi-Fi coverage may not be worldwide, and specific coverage may not be available for various reasons: national airspace restrictions, satellite coverage gaps, and other geographic limitations.

FAA certification for the antenna installations required for satellite Wi-Fi is currently pending for aircraft belonging to numerous airlines, and particularly affects international rollout plans.

For data methodology, see final page.

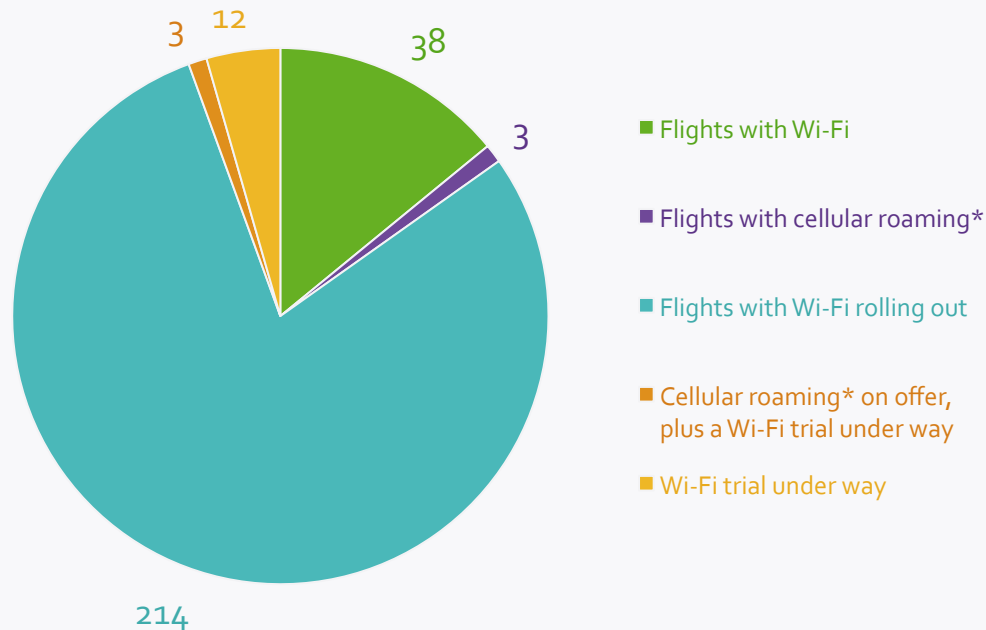
## 279 international flights from the US (6.5%) now have full-flight connectivity.

Passengers can now count on finding full-flight Wi-Fi on 38 flights from the US.

On a further 214 flights, Wi-Fi is rolling out to the fleet of aircraft used for the flight, but is not yet offered on every plane in that fleet.

*\*6 flights on British Airways and Virgin Atlantic have cellular roaming: the type of connectivity where passengers can use global roaming on their cellular device to connect with an onboard mini-cell tower, but non-cellular devices like laptops cannot connect. Of those, 3 (on Virgin Atlantic) are on planes that also have a Wi-Fi trial under way.*

### Daily international flights from the US with full-flight connectivity



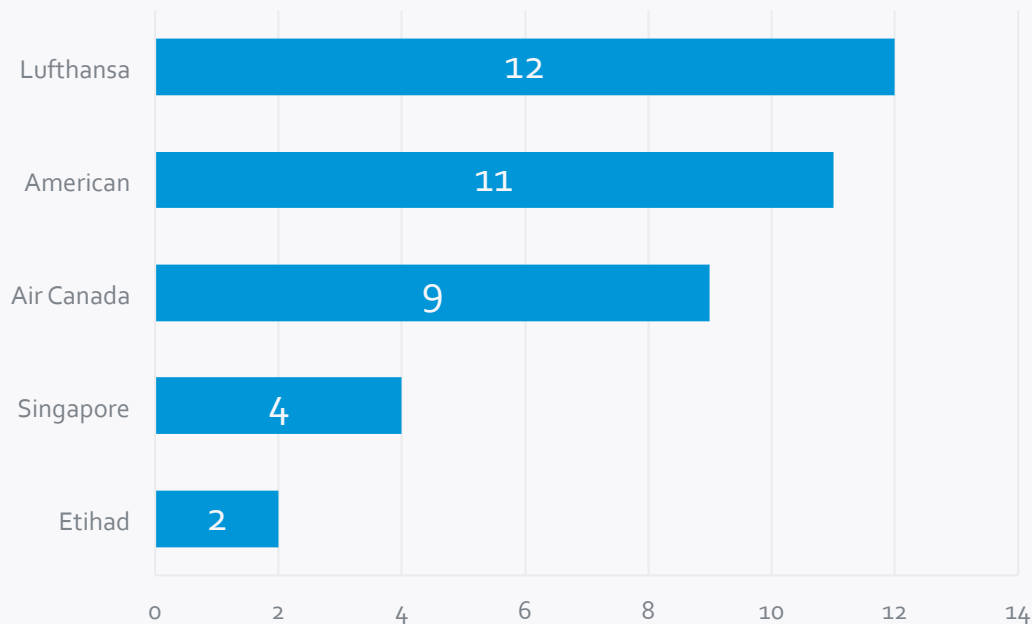
## You can now count on Wi-Fi on board 38 international flights from the United States.

Lufthansa provides the most certainty of finding international Wi-Fi from the US, with American following closely behind.

American's coverage will increase when more Boeing 777-300ER jets are delivered and FAA certification is received for refits of other aircraft. Delta and other airlines are also awaiting FAA certification for their Wi-Fi plans.

Etihad has dedicated its Wi-Fi-equipped Boeing 777-300ER planes to the JFK-Abu Dhabi route, while Air Canada offers nine flights with Wi-Fi on routes from the US.

Daily international flights from the US where full-flight Wi-Fi is offered



## While international full-flight Wi-Fi is still limited, it's becoming possible to find it.

Lufthansa flights to its Munich and Frankfurt hubs make up 30% of international Wi-Fi departing the US.

Shorter flights to Montreal (YUL) and Toronto (YYZ) are another full quarter of the full-flight international Wi-Fi picture from the US.

American's new Boeing 777-300ER makes up a further quarter, with Singapore Airlines (from Newark and LAX) and Etihad rounding out the longhaul pack.

*Airlines that have not yet completed full rollout of Wi-Fi across an aircraft fleet are not included on this page; see page 17.*

## Daily international flights from the US where full-flight Wi-Fi is offered, plus as a percentage of total daily flights on route





## United leads the way with full-flight Wi-Fi rollouts on 100 international flights.

214 flights from the US to international destinations are on planes where an airline is in the process of rolling out Wi-Fi — but not every flight is on an aircraft where Wi-Fi has been installed.

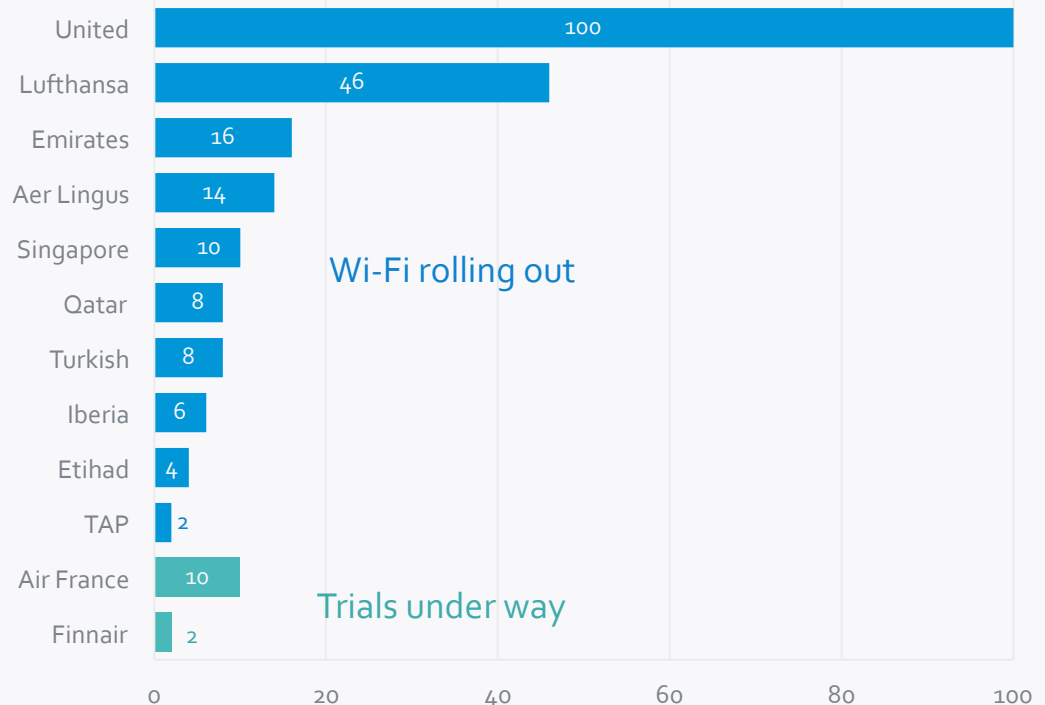
United received satellite certification and is installing international Wi-Fi connectivity on its Boeing 747 and Airbus A320/A319 fleets.

Flyers may be pleasantly surprised by Wi-Fi on longhaul flights from United's San Francisco 747 hub in particular.

Meanwhile, American, Delta, United and other airlines are awaiting regulatory approval from the FAA to offer Wi-Fi on further aircraft.

Further afield, Lufthansa's Airbus A380 and Boeing 747-8I are due to get Wi-Fi in late 2013.

### Daily international flights from the US with full-flight Wi-Fi rolling out



# More information, data sources and media requests

Analysis was based on US domestic and international flight schedules and Routehappy data for Sunday, July 7, 2013.

The Routehappy Flight Genius team is pleased to discuss its methodologies and data with media, airlines, and other interested parties. We can also provide further and deeper analysis, expert commentary, horizon-scanning, trend information, travel tips and much more for media and analysts. Wi-Fi availability is also displayed on every flight search at [Routehappy.com](http://Routehappy.com).

For more information, to schedule interviews, or to request specific data for your market/segment, contact Kellie Pelletier, Director of PR & Communications, [kpelletier@routehappy.com](mailto:kpelletier@routehappy.com), 917-514-5851.