

TABLET CHOICES: WHICH WAY IS YOUR AIRLINE HEADING?



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THE ANSWER IS FAR FROM STRAIGHTFORWARD. JUST AS THE CONSUMER MARKET HAS EVOLVED OVER THE LAST FEW YEARS, THE ENTERPRISE MARKET IS SHIFTING QUICKLY.

TABLETS IN AIR TRANSPORT: APPLE, GOOGLE, MICROSOFT?

In a rapidly moving tablet market, airlines are facing tough strategic decisions. The vast majority are introducing – or plan to introduce – mobile devices for their crews, either in the cabin or in the cockpit, according to SITA surveys.

This industry-wide rollout raises a number of questions about mobile strategies, a significant one being: 'Which platform should airlines opt for?'

The answer is far from straightforward. Just as the consumer market has evolved over the last few years, the enterprise market is shifting quickly.

CONSUMER DRIVEN?

Is the consumer market an indication of things to come? Strong competition to Apple's dominance has come from a host of lower-cost Android based devices over the last two years.

IDC report that Apple's market share has fallen to 32% for Q2 2013, from 60% for the same period a year before. Price pressure is set to continue with retailers in Europe launching their own range of devices into this crowded market.

Apple's continuing iPad innovations seem unlikely to stem the rise of low cost alternatives.

TABLETS IN THE CABIN

Just like the consumer market, Apple dominates the cabin, and has done so for several years with the iPad being the device of choice in almost every major mobility project.

Since British Airways announced the roll out of Apple devices to their crews some three years ago, several airlines have followed suite making the iPad the device of choice at the back of the plane.

Usability has clearly been a driving factor with Apple's market-leading interface gaining strong traction with users. A number of airlines cite strong user pressure to adopt the sleek design and ease-of-use the iPad offers. Their extensive iTunes App Store is also a big draw for many cabin crew.

This strong user affinity with Apple has been highlighted recently with one major airline's pilots reported to have fought hard against a decision to move away from the iPad.

CHALLENGES

But for how long will the iPad dominate? Despite strong user acceptance, the iPad does present a number of challenges.

The first is price. Rolling out devices across a fleet is a big investment, with the premium-priced iPad up to twice the cost of cheaper rivals.

This need to source lower-cost, more flexible devices has led a number of airlines to look very seriously at Google's Android platform.

Many of the major airlines SITA has worked with have considered Android devices but issues such as the fragmented number of versions available have held the platform back in the enterprise.

Although success for Android has been limited over the last few years, there have been notable exceptions - the largest of which was American Airline's decision to rollout 17,000 Galaxy Note devices.

CHALLENGERS

The second major challenge most airlines report with Apple devices could also be one of their rival's biggest opportunities.

Like most industries, airline IT systems have been dominated by Microsoft over the last 20 years. With so much time, effort and skills invested in the Windows platform there has been a real resistance from IT departments to port systems to a new, Apple-based, operating platform.

Although Microsoft's refocus on the tablet market and its release of Windows 8 hasn't been trouble-free, it's beginning to win major customers.

These include Delta Airlines who announced plans in September 2013 to equip 11,000 thousand of their crews with Windows devices. Operating system updates and newer Surface devices could help this trend.

INDUSTRY'S FUTURE

The market direction is far from clear. Apple will fight to hold its leadership in an increasingly fragmented and competitive market.

Microsoft shows good signs of being able to build on its existing strong position in the enterprise, but more work's needed to overcome their Windows' challenges.

And Android, though starting from a weak base, is building strongly in the consumer market and may yet make the jump into the cabin.

Whatever happens, tablets in the cabin are reality today and will rapidly become standard across the world's airlines. The industry will probably settle on a mixture of all three platforms but the fight for market share in the enterprise will be an interesting one to watch.

REMEMBER: STRATEGY FIRST

"Choosing the tablet platform to mobilize staff in the aircraft certainly raises key questions," says Arnaud Brolly, SITA's Mobility Portfolio Manager.

"But it's vital to remember that the tablet choice alone is not at the heart of the challenge. As you connect your aircraft, it's part and parcel of putting into place a sound and sustainable mobile strategy," he adds.

"SITA's experience with CrewTablet for cabin crew extends to production and trials with multiple airlines as part of coherent mobile strategy for connecting aircraft, which in some cases also includes the provision of in-flight GSM and Wi-Fi connectivity, working with our subsidiary OnAir."

"What's important is that the strategy is able to embrace connectivity for pilots and ground staff as much as it does crew members, as is the case with a growing number of our customers today." ■

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ARNAUD BROLLY
SITA'S MOBILITY PORTFOLIO MANAGER.



SITA AT A GLANCE

The air transport industry is the most dynamic and exciting community on earth – and SITA is its heart.

- Our vision is to be the chosen technology partner of the industry, a position we will attain through flawless customer service and a unique portfolio of IT and communications solutions that covers the industry's every need 24/7.
- We are the innovators of the industry. Our experts and developers keep it fuelled with a constant stream of ground-breaking products and solutions. We are the ones who see the potential in the latest technology and put it to work.
- Our customers include airlines, airports, GDSs and governments. We work with around 450 air transport industry members and 2,800 customers in over 200 countries and territories.
- We are open, energetic and committed. We work in collaboration with our partners and customers to ensure we are always delivering the most effective, most efficient solutions.
- We own and operate the world's most extensive communications network. It's the vital asset that keeps the global air transport industry connected.
- We are 100% owned by the air transport industry – a unique status that enables us to understand and respond to its needs better than anyone.
- Our annual IT surveys for airlines, airports and passenger self-service are industry-renowned and the only ones of their kind.
- We sponsor .aero, the top-level internet domain reserved exclusively for aviation.
- In 2013, we had consolidated revenues of US\$1.63 billion.

For further information, please visit www.sita.aero



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