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Bangkok, Thailand
30 – 31 October 2024

**Can Airlines Accelerate the
Shift to Modern Retailing?**

#IATAWPS #IATAWFS #IATAWFSWPS



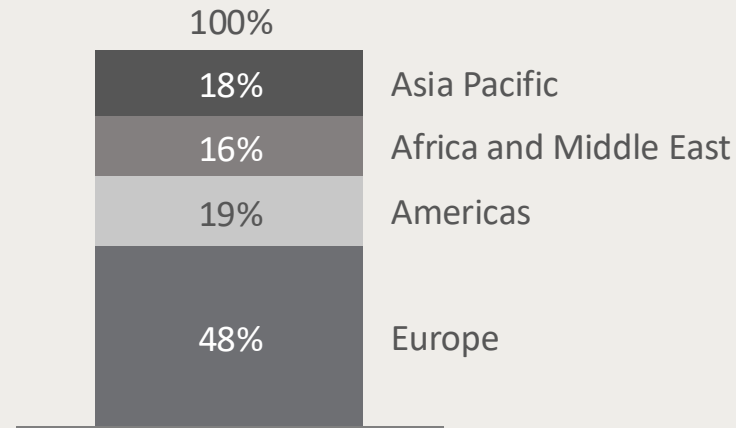
2024 Airline Survey Parameters

150+

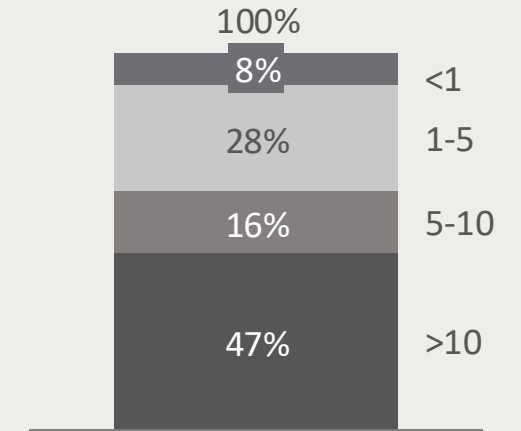
respondents with
hands on experience in
the modern retailing
transformation



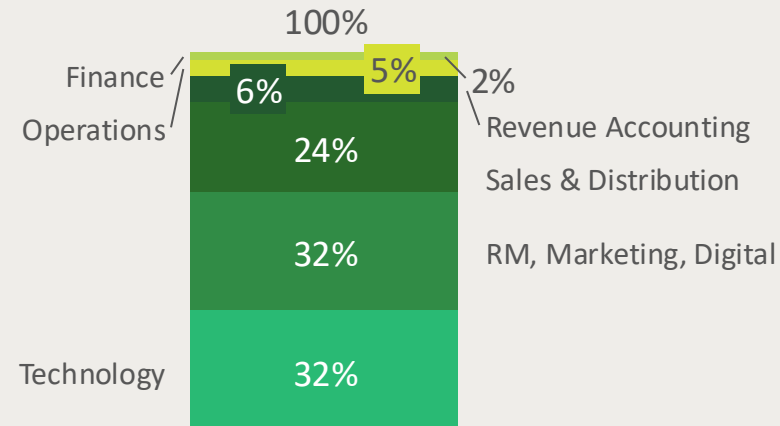
Geography



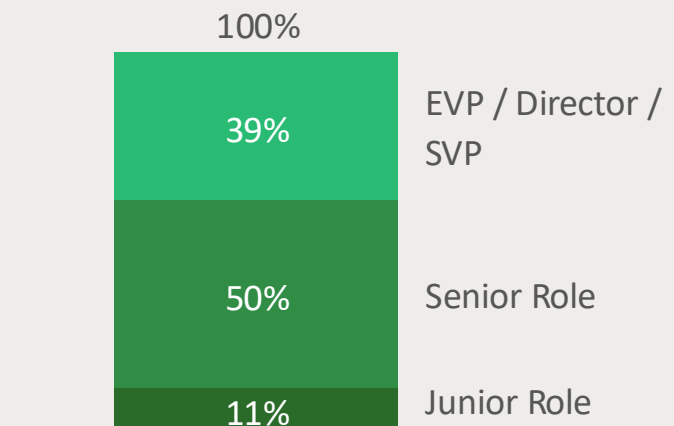
Airline revenue (USD billions)



Department



Role



Significant Progress in NDC Implementation.

Current focus on Orders and Interlining

NDC

>80%

Of the respondents state that their airline's **NDC channel is live**

Orders

40%

Of the respondents state that their airline **has already defined a strategy or business case for Orders**

Interlining

<10%

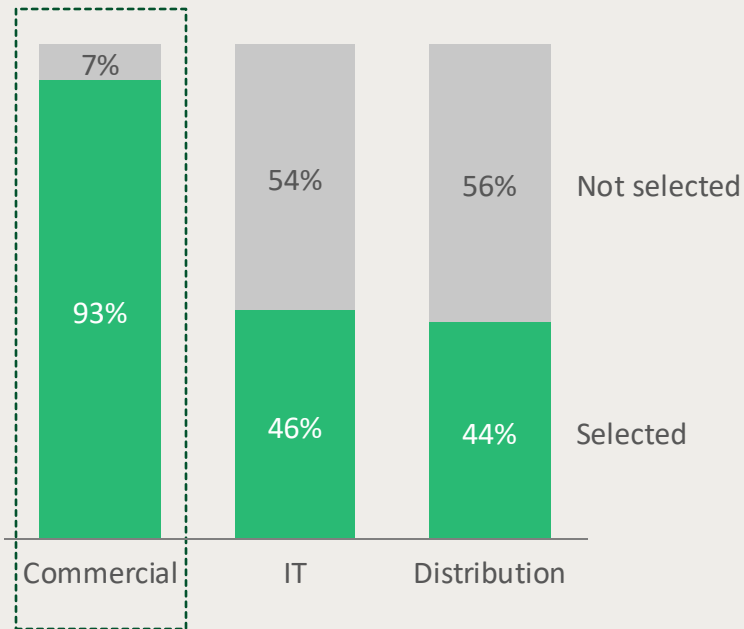
Of the respondents state that their airline **currently is testing Interlining under Offers and Orders with a few partners**

Siloed departments and biased mindset within airline organizations remain a hurdle

In your airline, which departments are the most SUPPORTIVE of the transition to 100% Legacy-Free Offers and Orders (choose all that apply)?

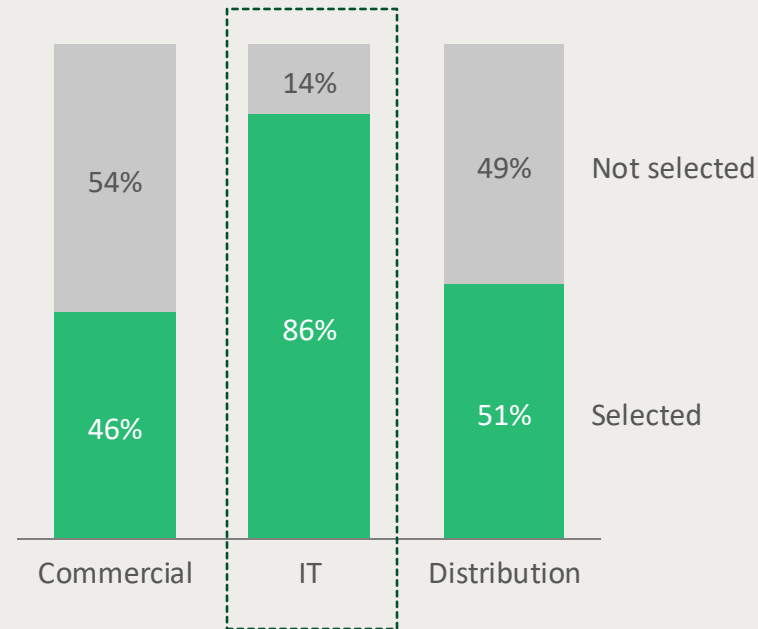
Respondents from Commercial functions

% of answers for each department



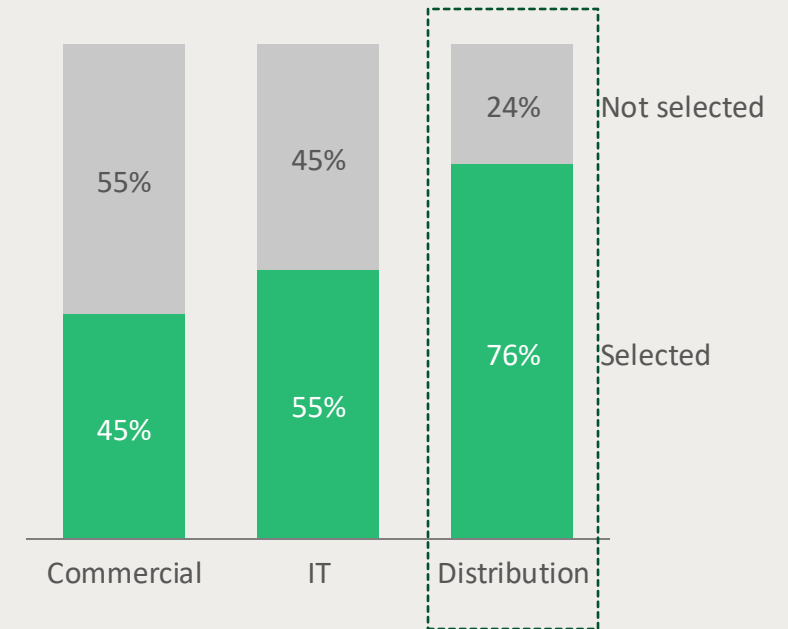
Respondents from IT functions

% of answers for each department



Respondents from Distribution functions

% of answers for each department



View about own department

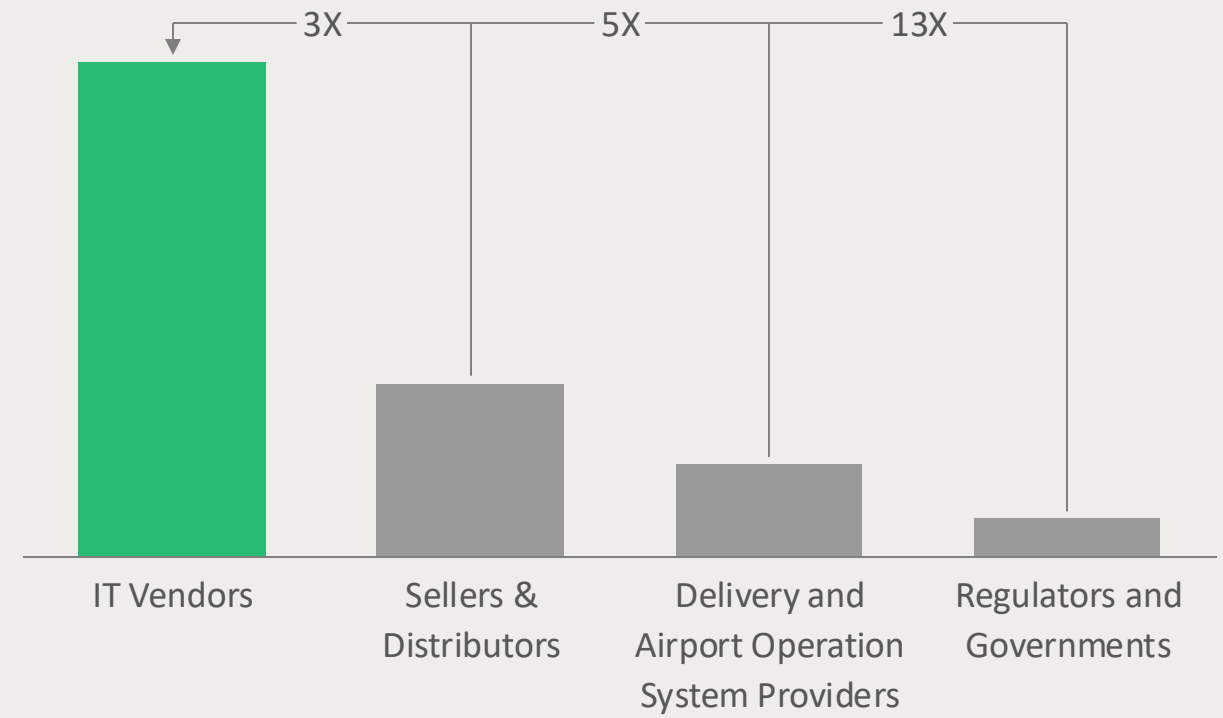
Airlines Are Optimistic About Technology and IT Vendor Readiness to Support Offers & Orders

87%

Of the respondents believe that **IT vendors** are either **already investing sufficiently** or **will do so in the near future**



Regarding **key airline partner and stakeholders**, how **confident** are you that **they will be ready** to support 100% Legacy-Free Offers and Orders?
% of answers stating "High Levels of Confidence"



Offers and Orders is Gaining Momentum, but the Finish Line is Still Years Away

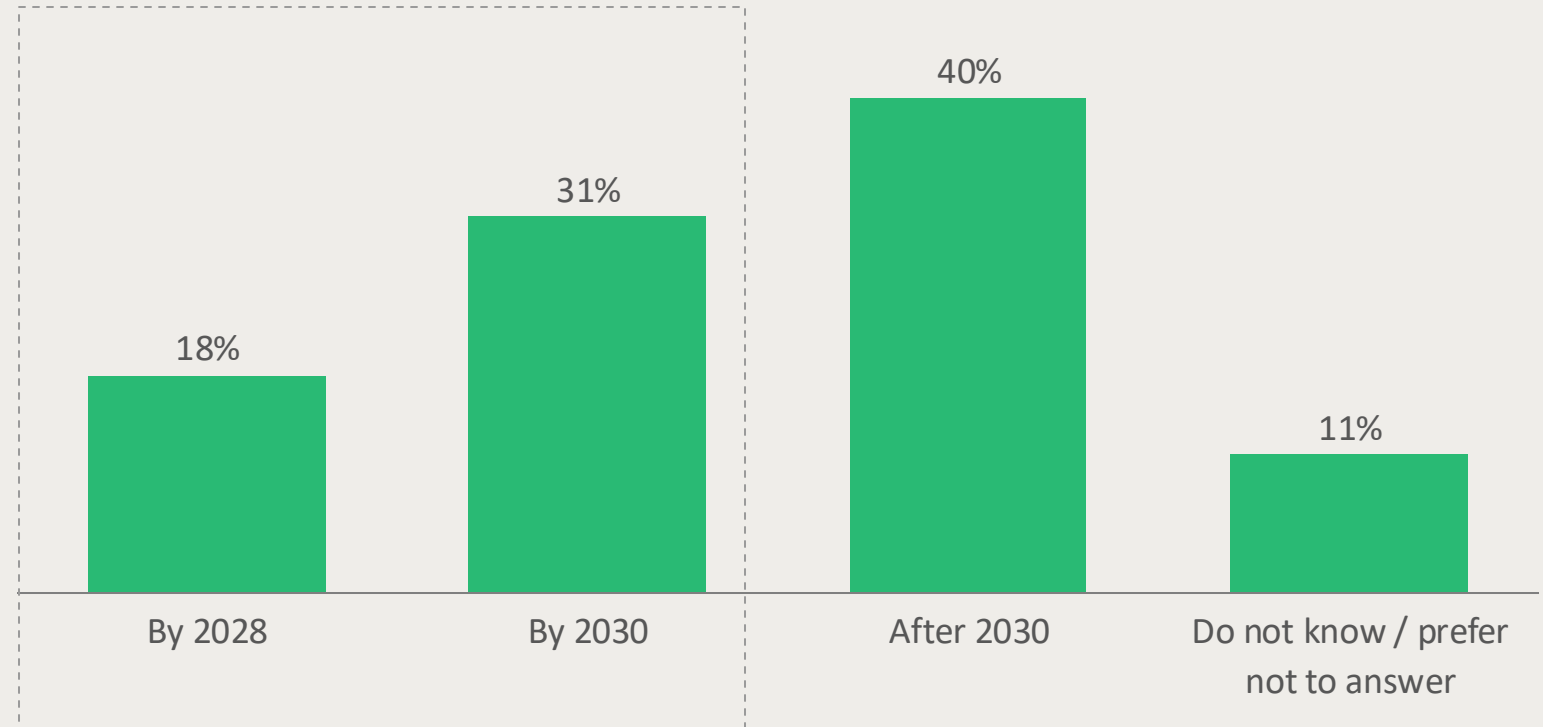
49%

Of the respondents **believe** that achieving the 100% legacy-free Offers and Orders milestone will happen by 2030, vs 63% from the IATA x BCG 2022 Survey



When do you believe **your airline will have implemented 100% Legacy-Free Offers and Orders** systems and processes?

% of answers



Critical Next Steps for Airlines

1

Make a strategic choice of your **airline's role as a retailer**

2

Identify the **key use cases to deliver customer value**

3

Determine the **strategic alliances and carefully select your partners**

4

Setup the **organizational context for modern retailing to succeed**

5

Define how to **exploit new disruptive technologies going forward**

Thank you.

For further readings, use the QR code below
and for additional details on the survey results,
get in touch with **Guerrini.Alberto@bcg.com**



“Can Airlines Accelerate
the Shift to Modern
Retailing?”