World Economic Forum
Digital Transformation Initiative
In collaboration with Accenture

AVIATION, TRAVEL AND TOURISM INDUSTRY
EXECUTIVE SUMMARY
JANUARY 2017
The aviation, travel and tourism industry has been a digital trailblazer, but further change is ahead.

There is widespread recognition among industry leaders that the role of digital technology is rapidly shifting, from being a driver of marginal efficiency to an enabler of fundamental innovation and disruption.

Digitalization is the cause of large-scale and sweeping transformations across multiple aspects of business, providing unparalleled opportunities for value creation and capture, while also representing a major source of risk. Business leaders across all sectors are grappling with the strategic implications of these transformations for their organizations, industry ecosystems and society. The economic and societal implications of digitalization are contested and raising serious questions about the wider impact of digital transformation.

Digital technology is transforming most industries, including aviation, travel and tourism, and creating new challenges that need to be understood. These include factors such as the pace of change, cultural transformation, outdated regulation, identifying the skills needed for the future, overcoming shortcomings in legacy systems, and the need to fund both digital and physical infrastructure. These challenges need to be addressed by industry and government leaders to unlock the substantial benefits that digital offers society and industry.

The World Economic Forum is committed to helping leaders understand the implications of digital transformation and supporting them on the journey to shape better opportunities for business and society.
INTRODUCTION TO THE DIGITAL TRANSFORMATION INITIATIVE (DTI)

In a world where game-changing innovation has become the norm, DTI provides a unique insight into the impact of technology on business and society over the next decade.

The past 12 months have brought a series of exciting technological breakthroughs. Self-driving Tesla cars can now be seen on the road; Uber is testing autonomous taxis in Pittsburgh; Google DeepMind’s Alpha Go demonstrated a leap forward in artificial intelligence with a famous victory at the board game Go; and augmented reality hit the mainstream with the success of Pokémon Go. Game-changing innovation has become the norm.

Digital innovation is reshaping industries by disrupting existing business and operating models. But it is also having a profound impact on society, presenting a series of opportunities and challenges for businesses and policy-makers.

The Digital Transformation Initiative (DTI) is a project launched by the World Economic Forum in 2015 to serve as the focal point for new opportunities and themes arising from the latest developments in the digitalization of business and society. Over the past two years, DTI has analysed the impact of digital transformation across 13 industries and five cross-industry themes. We have also developed a unique value-at-stake framework to support a consistent approach to measuring the impact of technology on business and wider society. An overview of this framework is included on the next slide.

Our goal is for this framework to provide an evidence base and common language for public-private collaboration focused on ensuring that the benefits of digital transformation are fairly and widely shared.
Our unique economic framework helps business leaders, regulators and policymakers unlock the $100 trillion of value that we estimate digitalization across all industries could generate over the next decade.

- We have developed a **unique economic framework** that aims to quantify the impact of digital transformation on industry and broader society.
- Our framework is **new and will be iterated further over the next year**, but it can already be applied at all levels of government and business, helping stakeholders make the decisions that deliver the full potential of digital transformation.

- It provides a **consistent evidence base and library of definitions for digital concepts**, supporting a global, multistakeholder dialogue about digitalization and its implications.
- We have achieved **proof of concept** of the framework at an industry level (11 industries) and successfully piloted its application at a national / state level (in Denmark, India, the United Kingdom and the Indian state of Telangana).
The industry has been at the forefront of digital disruption, changing the way we travel in recent years. However, the sector should brace itself for another wave of digital transformation.

The aviation, travel and tourism industry has been an early adopter of digital innovations but our research suggests that the industry should brace itself for further disruption. Industry, customer and technology trends are converging to redefine operating and business models in the travel ecosystem. New entrants – especially digital natives such as online travel aggregators (OTAs), meta-search engines and travel service platforms – are shaking up the value chain. Growing demand for travel, particularly in emerging markets, represents a significant opportunity for these new entrants, as they challenge incumbent businesses to rapidly adapt their own strategies to capture growth. Travel providers are seeking stronger interactions with customers, while drastically changing operations, in pursuit of better insights around customer preferences and operational performance. Connected devices and artificial intelligence (AI) will provide ample opportunities to make those operations more effective, and enable collaboration and asset-sharing between enterprises. Technology will also have an impact on the industry workforce, with employees empowered by real-time information and decision-making support from AI to focus on their core strengths.

In the following slides, we explore some of these themes in more detail.
AVIATION, TRAVEL AND TOURISM: KEY INDUSTRY TRENDS AND INFLUENCERS

Industry trends

Growing demand for travel
Appetite for travel has increased due to demographic developments (e.g. the growing influence of millennials, an expanding middle class in high-growth regions) and more affordable airfares.

Rise of the digital consumer
Companies are capitalizing on technological developments to create digital platforms that disrupt the traditional value chain.

Changes to the security landscape
Geopolitical tensions, terrorist activity and accidents have renewed the focus on security and safety. This is also creating a new demand for frictionless travel coupled with high security standards.

70% Forecast share of global airline travel that emerging markets will account for by 2034

Source: Airbus

Influencers

Regulations
Regulatory regimes can discourage corporations from pursuing new technologies because they cannot be made profitable in the current regulatory environment. Cross-border integration can be difficult due to differing regulations among countries.

Legacy systems
Companies need their ‘old’ legacy systems to continue operating as they develop new ones, reducing an organization’s agility and capacity to transform itself quickly.

Infrastructure
Accelerating change from digitalization will also have an impact on future investments in both physical infrastructure and digital technologies.

Jobs and skills
Digital transformation demands a different skill set from workers in today’s economy and will create new types of jobs. These changes will bring about many challenges such as managing the impact of automation on employment, reskilling the workforce, and creating a safety net for members of a flexible workforce.
AVIATION, TRAVEL AND TOURISM: TECHNOLOGY TRENDS

Rise of intelligent automation

The increased use of robotics, 3D printing, AI and the Internet of Things (IoT) will improve quality of services while creating a lower environmental impact and cost. By weaving together systems, data and people, the traveller experience will be transformed to maximize the likelihood of a rebooking due to the quality of service. From an operational perspective, intelligent automation represents a sizeable opportunity to make enterprises more efficient and effective.

Dominance of digital platforms

Digital platforms are taking shape across the industry. In the digital economy, platform ecosystems are the foundation for new value creation. The chart shows the comparison of market capitalization of OTAs versus traditional industry players. These technology trends are not new, but they are now deliverable at scale. Businesses should exploit these trends fast – or at least prepare for their impact – because of two major developments:

- **Digitalization of everything.** Now that advanced technology is affordable and miniaturized, the barriers that prevented devices, vehicles, people and things from connecting have been torn down.
- **Liquid expectations.** Inspired by consumer-centric experiences in other industries, customers in the travel industry now have high expectations.

---

**Market capitalization comparison of OTAs, airlines and hotels**

September 2016, $ billion

<table>
<thead>
<tr>
<th></th>
<th>OTAs</th>
<th>Airlines</th>
<th>Hotels</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priceline</td>
<td>73</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Airbnb</td>
<td>30</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delta</td>
<td>26</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Iarnród Éireann</td>
<td>26</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Southwest</td>
<td>24</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Qantas</td>
<td>23</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hainan</td>
<td>19</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANA</td>
<td>18</td>
<td></td>
<td></td>
</tr>
<tr>
<td>El Al</td>
<td>17</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Etihad</td>
<td>17</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delta</td>
<td>13</td>
<td></td>
<td></td>
</tr>
<tr>
<td>China Eastern</td>
<td>11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accor</td>
<td>11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lufthansa</td>
<td>15</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TripAdvisor</td>
<td>9</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Singapore Airlines</td>
<td>9</td>
<td></td>
<td></td>
</tr>
<tr>
<td>China Southern</td>
<td>9</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Air France</td>
<td>8</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Vietnam Airlines</td>
<td>7</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cathay Pacific</td>
<td>5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lufthansa</td>
<td>5</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
AVIATION, TRAVEL AND TOURISM: DIGITAL THEMES

We expect four themes to be central to the industry’s digital transformation over the next decade:

1. **Living Travel Experience**
   - Travellers will experience seamless journeys tailored to their habits and preferences. Companies along the travel journey will optimize customer experience by collecting and exchanging data, and continuously generating insights. In time, travel will become frictionless, blending with other everyday activities.

2. **Enabling Travel Ecosystem**
   - Ecosystem roles are blurring as stakeholders throughout the customer journey vie to own the customer relationship. Digital platforms that enable ecosystem alliances will continue to emerge, as asset- and information-sharing become increasingly important from a B2B perspective.

3. **Digital Enterprise**
   - Digital technologies that revolutionize manufacturing, optimize the real-time use of assets and eventually augment the industry workforce will transform operations. Innovations such as 3D printing, AI, IoT, virtual reality (VR) and digital platforms will enable flexible working and changes to core operational processes.

4. **Safety and Security**
   - As identity management becomes increasingly digital, a collaborative effort towards boosting cybersecurity and protecting the privacy of traveller data will be crucial to maintaining customer trust and public safety. Digital technologies will be used to create a ubiquitously secure environment.

**Total value at stake**

- **Industry**
  - $100 billion
  - $105 billion
  - $190 billion
  - $10 billion

- **Society**
  - $165 billion
  - $380 billion
  - $20 billion
  - $140 billion
Digitalization has the potential to create greater value for industry ($705 billion) than wider society ($405 million) over the next 10 years. The themes that create the largest impact for this industry are Living Travel Experiences and Enabling Travel Ecosystem, which together account for 75% of the value at stake.

### Aviation, travel and tourism: value at stake for industry and wider society (by digital theme)

<table>
<thead>
<tr>
<th>Theme</th>
<th>Potential Business Impact ($ billion)</th>
<th>Potential Societal Impact ($ billion)</th>
<th>Total Value at Stake ($ billion)</th>
<th>Emission Reduction (million tonnes CO₂)</th>
<th>Net Impact on Jobs (1000s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Living Travel Experiences</td>
<td>100</td>
<td>165</td>
<td>265</td>
<td>-</td>
<td>270</td>
</tr>
<tr>
<td>Enabling Travel Ecosystem</td>
<td>105</td>
<td>380</td>
<td>485</td>
<td>107</td>
<td>(940)</td>
</tr>
<tr>
<td>Digital Enterprise</td>
<td>190</td>
<td>20</td>
<td>210</td>
<td>143</td>
<td>(100)</td>
</tr>
<tr>
<td>Safety and Security</td>
<td>10</td>
<td>140</td>
<td>150</td>
<td>-</td>
<td>(10)</td>
</tr>
<tr>
<td>Cumulative Total</td>
<td>405</td>
<td>705</td>
<td>1110</td>
<td>250</td>
<td>(780)</td>
</tr>
</tbody>
</table>

Source: World Economic Forum / Accenture analysis
FOCUS ON LIVING TRAVEL EXPERIENCE: DIGITAL INITIATIVES

Putting customers at the centre of travel services, and integrating physical and digital assets to deliver seamless customer journeys, are vital steps towards creating highly personalized, end-to-end travel experiences.

**Traveller Centricity**

In line with rising demand for traveller-centric experiences, companies will provide better, hyper-personalized products and services. By capturing personal data from customers and learning more about their behavioural patterns, companies could optimize services across the customer journey.

**Seamless Customer Journey**

Integrating operations across physical and digital assets will result in a seamless customer journey by making information available continuously, reducing waiting and transfer times, hyper-personalizing services and optimizing rerouting.

**End-to-End Propositions**

End-to-end propositions are starting to overhaul traditional methods of booking elements of a journey (e.g. flights, transfers and hotels) separately. Fully integrated and personalized travel experiences can be booked more quickly and easily.

**Value-at-stake headlines**

We expect the shift to online booking to cause $40 billion of profits to migrate from traditional to online channels. Data-enabled personalization could generate operational benefits for hotels and airlines of $40 billion by allowing them to better understand customers and operate with leaner processes. Customers could benefit from time savings valued at $160 billion, thanks in part to the enhanced transparency of OTAs making booking travel quicker.
FOCUS ON ENABLING TRAVEL ECOSYSTEM: DIGITAL INITIATIVES

The growing power of digital platforms is reshaping the travel ecosystem, making new business models viable and intensifying the battle for customer mindshare.

**Ecosystem Convergence**

Industry players are forging new collaborations and expanding existing ones, both inside and outside the traditional boundaries of the aviation industry. As companies at the edge or outside the travel ecosystem are drawn in, traditional industry roles will blur and become less relevant. This phenomenon – an ecosystem convergence – brings new products and services.

**Battle for Customer Mindshare**

As companies horizontally and vertically integrate, they need to have a strong understanding of what customers want. Two factors will be critical for gaining a competitive advantage: increased interaction with customers, enabling companies to understand them better, and greater collaboration both within and outside the travel ecosystem.

**Diffusion of Ownership**

In the travel ecosystem, there is great potential for sharing models based on company assets, optimizing the utilization of assets and leading to a diffusion of ownership. As systems become more interoperable, it will become easier to share assets. The interoperability of systems and standardization in system architecture, data and definitions will be prerequisites for success.

**Value-at-stake headlines**

The growing popularity of sharing models could cause $55 billion of value to migrate from hotels to short-term rentals. Customers could save $195 billion through booking short-term rentals that are cheaper than staying in a hotel, while homeowners could earn $180 billion from renting out their living space on a short-term basis. However, the move to sharing models could displace around 940,000 jobs, especially in hotels.

Illustrative case studies:
FOCUS ON DIGITAL ENTERPRISE: DIGITAL INITIATIVES

Technologies such as 3D printing and cloud computing offer companies the opportunity to radically reinvent their operations. These changes will boost efficiency but also have a significant impact on the industry’s workforce.

Smart Manufacturing

Using smart manufacturing technologies such as 3D printing in the production process will result in products that are 30% to 55% lighter and cheaper. Joint innovation platforms and flexible production sites will be important factors in realizing efficiency gains throughout the supply chain.

Intelligent Assets

Using operational data effectively can boost the efficiency of company assets. By deploying connected assets, organizations can increase asset utilization and reduce marginal costs across ecosystem players. The applications of intelligent assets include predictive maintenance, smarter air traffic control and route optimization for cargo trucks.

Next-Generation Workforce

It is expected that some process-driven jobs will be taken over by automated systems, but the ability of humans and machines to collaborate effectively will be the defining feature of the next-generation workforce. Technologies such as VR will have an important role in supporting the workforce.

Value-at-stake headlines

These initiatives could generate $190 billion of value for the industry through improved workforce productivity and lower costs. Although increased productivity will reduce dependence on human workers in several segments, potentially displacing 100,000 jobs, this impact will be relatively small, because 650,000 new jobs are expected to be created in the same segments (airlines, aircraft manufacturers, airports and hotels).

Illustrative case studies:
FOCUS ON SAFETY AND SECURITY: DIGITAL INITIATIVES

As safety and security evolve across physical and digital spaces, data sharing, interoperable security systems and law enforcement cooperation on a global scale will become increasingly important.

Data Dilemma

The extent to which customers are prepared to trade their privacy for more security (and other potential benefits) will determine how everyday security will evolve. One solution is a central data opt-in system, in which travellers can decide to whom their information is available and for how long (e.g. with local authorities, a hotel and insurance company but only for the duration of an overseas trip, before it is encrypted again).

Modern Security Environment

Security in restricted areas such as airports is currently managed using strict checkpoints, which can lead to long waiting lines and low customer satisfaction. Screening technology such as biometrics, full-body scanners and multi-view X-rays will improve the efficiency and effectiveness of security checks, while minimizing disruption for travellers.

Ubiquitous Tourist Safety

Video and IoT-linked sensors to gather data, and analytic capabilities to draw insights from that data, will be the core technologies underpinning ubiquitous tourist safety. Video analytics can help security or police officers analyse crowd behaviour and emotions. These technologies create a virtual security fence that isn’t dependent on physical checkpoints.

Value-at-stake headlines

These initiatives could generate $7 billion of value for the industry through improved security-related cost efficiency. Customers could benefit from cost and time savings worth $20 billion thanks to reduced security charges and less queueing at checkpoints. Although difficult to quantify, we estimate that society could also benefit by around $120 billion, based on more effective security preventing a major terrorist attack.
Here are just three of the many case studies that can be found in our white paper on digital transformation in the aviation, travel and tourism industry.

**Marriott:**

**VR in your hotel room**

In-room entertainment options are growing at Marriott Hotels. VRoom Service lets guests order VR experiences that can be enjoyed from the comfort of their own rooms. Users can explore the streets of Beijing, an ice-cream shop in Rwanda or the Chilean Andes. As VR is adopted more widely, it can redefine how content is published and how we experience the world around us. Imagine a mixed reality experience that integrates the physical and digital worlds: you could be perched at the top of a virtual Eiffel Tower, all the while enjoying a real-life French meal with a friend. It could also be applied during the inspiration and booking phases of the trip and, for some, it might even serve as a substitute for actual travel.

**Airbus:**

**Exploring innovative application of 3D printing**

Airbus Group has started using 3D printing for tooling, prototyping, making parts for test flights and aircraft in commercial service. There are also plans to use 3D printing to manufacture missing and nonstandard parts on demand and in low quantities, to minimize disruption in the manufacturing process. More than 1,000 parts of the A350 are now made through 3D printing – more than on any other commercial aircraft. In addition to exploring innovative applications for raw materials, Airbus is also pushing forward on the regulation front, i.e. by working with the European Aviation Safety Agency (EASA) to qualify 3D-printed titanium components.

**Henn-Na Hotel:**

**Operating the first robot-staffed hotel**

Japan’s five-star Henn-Na Hotel is the first hotel to be equipped with intelligent robots as its staff. It aims to be “the most efficient hotel in the world” by reducing manpower and having robots of various shapes and sizes make up 90% of its personnel. Japanese-speaking guests are greeted by humanoid robots at the reception, while English-speaking guests are met by a robotic dinosaur. Functional droids are distributed across the hotel to carry luggage, man luggage lockers and provide housekeeping services. The hotel is also equipped with state-of-the-art technologies such as facial recognition for guest room access, tablets to make in-room service requests and radiation panels that can detect body heat and automatically adjust ambient temperature.
As the digitalization of aviation, travel and tourism accelerates, stakeholders within the industry will need to consider important questions about the future evolution of the travel ecosystem.

**Personal Data**

Customers opting in to share (personal) data will enable companies to deliver a hyper-personalized travel experience.

How can the travel ecosystem incentivize customers to share personal data in exchange for tangible benefits? To what extent can companies gain customers’ trust that their data is indeed being used to improve their experience?

**Collaboration**

In an ecosystem where boundaries are blurring, roles are changing rapidly, and stakeholders are reluctant to collaborate for fear of losing customer mindshare, is there a model for forging international collaboration and facilitating the sharing of information and assets, so as to unleash the full potential of digital transformation?

**Online vs. Offline**

The division between online and offline spaces is blurring: physical assets are becoming digital and the world is becoming smart and connected.

What implications does this have for the operating model of organizations working in this environment? What will be the impact on consumer behaviour? How will customers adapt to cyber-physical experiences?

**Security**

Greater sharing of personal data enables authorities and industry stakeholders to improve security.

To what degree can personal data be securely and ethically captured, and made interoperable across stakeholders responsible for the safety and security of the travelling public?
Conclusion

There are some prerequisites to successful digital transformation. Foremost among them is strong leadership and sponsorship from the top of the organization. Even with that in place, the biggest barrier to digital adoption can be corporate culture, which often resists changes to organizational structure or functions. Clear communication from the company’s leadership on the positive impact of digitalization can combat this inertia and encourage acceptance of digital transformation. Many aviation, travel and tourism companies concentrate on their relationship with customers and direct their digital investments to websites and mobile interfaces. It is crucial, however, not to neglect operations and recognize the vast potential for efficiency and cost savings that technology can bring.

In parts of the industry, a highly regulated environment is stifling innovation in products and services. The pace at which new regulations are drawn up and implemented is too slow. To improve this situation, companies should keep policy-makers and regulators aligned on recent developments, narrowing the gap between innovation and regulation. All stakeholders have an added responsibility to understand the implications of a potentially widening digital divide in society and to take proactive actions to maximize the socio-economic benefits of digital transformation in an inclusive manner.

Key recommendations

- Legacy systems need to transform or connect into agile interoperable platforms, to enable plug-and-play interactions among partners in the ecosystem. This will help with asset-sharing and generate new, seamlessly integrated products and services that make travel a part of people’s lives. This represents a significant investment for incumbents, but a necessary one to compete in the digital era.

- Support the transition of the workforce by reskilling current employees through training, e.g. massive open online courses (MOOCs), boot camps or rotation programmes. Empower educational institutions to design curricula that prepare the next generation to work collaboratively with intelligent technologies. Offer more freedom and flexibility to workers, enabling people to schedule their own work. Find the balance that protects the workforce and gives room for development, while keeping the industry competitive.

- With data critical to the success of the industry’s digitalization, a multistakeholder approach spanning the private and public sectors and civil society is needed to deliver regulatory frameworks that define the appropriate uses of traveller data. These frameworks will stipulate who owns the data, who can use it and how it will be protected.

Maximizing the value of digitalization in aviation, travel and tourism will require concerted action from industry leaders, regulators and policy-makers. A series of actions have been identified for stakeholders looking to make digitalization a success.
Over the past two years, DTI research has focused on understanding the impact of digital transformation in 13 industries and drawing insights from the cross-industry themes that came out of that analysis.

We have covered five cross-industry themes. Digital Consumption explains how the rapidly changing expectations of digital customers are forcing enterprises to reinvent themselves. Digital Enterprise looks at how companies can respond by rethinking every aspect of their business. Platform Economy focuses on the immense impact of one type of digitally enabled business model – B2B platforms. The adoption of new digital business and operating models is having a profound impact on society, a theme we analyse in Societal Implications. We then introduce our quantitative analysis of the impact of digitalization on business and wider society in our final cross-industry theme, Societal Value and Policy Imperatives.

Our industry deep dives have covered 13 industries: Automotive; Aviation, Travel and Tourism; Chemistry and Advanced Materials; Consumer; Electricity; Logistics; Media; Mining and Metals; Oil and Gas; Professional Services; Retail and Telecommunications.

White papers, SlideShares, articles, an overall executive summary for the DTI project, and a library of video interviews can be found on our website.

Key features

- Mobile-responsive, platform-agnostic site
- 13 industry white papers
- 5 cross-industry white papers
- 13 SlideShare summaries of white papers
- 60+ video snippets and mini documentaries
- Online case study repository
- 4 animations on digital challenges
ACKNOWLEDGEMENTS

The World Economic Forum would like to acknowledge and extend its sincere gratitude to a broad community of contributors across Partner companies, technology start-ups, academics, experts and other organizations.

Participating Organizations

- AccorHotels
- AirAsia
- Airbnb
- Bluesmart
- Business for Social Responsibility
- Carlson Wagonlit
- Deutsche Lufthansa
- Emirates Group
- Gulfstream Aerospace Corporation
- InterContinental Hotels Group
- International Air Transport Association
- International Trade Union Confederation
- International Transport Workers’ Federation
- KLM
- Lockheed Martin Corporation
- LVNL
- Marriott International
- Matternet
- National Aviation Services
- Office of the Assistant Secretary for Aviation and International Affairs, U.S. Department of Transportation
- Song Saa Group
- Travelport
- Trip38
- UPS
- Visa
- Wyndham Hotels

Project Team Contributors

World Economic Forum
- Mark Spelman, Co-Head, System Initiative on Shaping the Future of Digital Economy and Society
- Bruce Weinelt, Head of Digital Transformation
- Juergen Keitel, Community Lead, Head of Aerospace Industry
- Tiffany Misrahi, Community Lead, Head of Aviation, Travel & Tourism Industries
- Reema Siyam, Project Lead, Digital Transformation Initiative

Accenture
- Liselotte de Maar, Accenture Strategy, Global Lead Travel & Tourism
- Brian Goldman, Accenture Strategy, Travel & Tourism
- Harshdeep Jolly, Accenture Strategy, Project Lead and World Economic Forum Secondee
- Anand Shah, Accenture Strategy, Digital Transformation Initiative Engagement Partner
- Rohit Bhat, Accenture Strategy
- Camiel Janssen, Accenture Strategy
- Nerjada Maksutaj, Accenture Strategy and World Economic Forum Secondee
- Roland Schoonbeek, Accenture Strategy
- Shishir Shroff, Accenture Strategy, Value Expert