In the retail-led future of airlines, the sky's the limit

accenture

The ability to truly understand customers on an individual level is within reach for airlines, but transitioning to a modern retailing approach is a challenging and complex process.

What's needed:

High-level strategies designed to support sustained growth and meaningful differentiation. Here's how to navigate the path ahead.

Contents

Introduction

The airline industry is on the verge of a transformative shift, with modernized offer, order, settle and deliver (OOSD) systems poised to unlock billions of dollars in trapped value. These systems enable airlines to gain deeper insights into customer behaviors and preferences, allowing brand differentiation and evolved offerings and our analysis shows that using them well could boost annual revenues by 3–6%[1], underscoring their critical role in shaping future competitiveness.

With industry-wide momentum building, the value of this transition is widely recognized. However, overall progress towards adopting these systems remains slow. In part, that's because transitioning from legacy systems to modern retailing platforms is incredibly difficult. Airlines face the dual challenge of upgrading legacy systems while aligning with evolving global distribution systems (GDS) and coordinating efforts across their partner networks. They also have to shift their approach to collaboration, transforming roles and establishing new collaborative norms.

But the bigger barrier is strategic. Most airlines are approaching these changes as incremental improvements, which deliver promising results in the short-term but do not add up to the full-scale transformation that will propel them into a competitive future.

> What's needed instead is a bold vision and strong leadership. Airline executives need to rethink their operational models and customer engagement strategies at a high level, if they are to set a strong new foundation for long-term differentiation and growth.

With that approach in mind, this report explores the industry's pressing challenges and game-changing opportunities through three lenses: **Reality** (understanding the current state of play, and how today's challenges and opportunities call for a strategic response); **Reaction** (identifying paths to progress) and **Resolution** (the strategic actions needed to achieve customer-centric retail transformation). To do so, it draws on findings from our recent global survey[2] of 3,000 travelers and 311 airline C-suite executives (CXOs), including 109 from Full-Service Carriers (FSCs) and 93 from Low-Cost Carriers (LCCs); our industry analyses and our experience.

Reality:
Decoding the disconnect

Despite growing recognition of modern retailing's potential, most airlines remain in the early phases of adopting the technologies that will make it a reality. That speaks to the challenges associated with technology upgrades. However, it also points to a focus on short-term gains over longer-term strategies.

Understanding the current state of airline retail transformation—the quest for short-term gains

Even though New Distribution Capability (NDC) was introduced back in 2012, many airlines are still testing or piloting them. Although adopters have seen incremental benefits, including improved pricing control and revenue increases of up to 1.5–2%[3], hidden infrastructure costs in the form of IT operations and implementation expenses often dilute these gains.

This also impacts other key areas. For example, ancillary sales, such as seat upgrades and onboard purchases, have increased up to tenfold[3], driven by unbundling strategies and enhanced servicing capabilities. And NDC and interline order structures (whereby one airline sells services that are provided by another airline) improve certain aspects of airline retailing. But customers still prefer online travel agencies (OTAs). (See the sidebar: "Why do travelers prefer OTAs?")

Why do travelers prefer OTAs?

Convenience, experience, service, bundling options.

71%	of travelers in our survey said they prefer OTAs for their convenience as a one-stop shop, offering easy access to promotions, discounts and a wide range of options.
70%	Value mobile app notifications for deals, while price comparisons and intuitive search features enhance the experience.
50%	Rate the overall service offered on OTAs as "much better" than alternatives.
36%	Highlight superior bundling options.
32%	Appreciate the broader availability of flight choices.

That's a big reason why, as airlines progress with NDC, they are treating it less as a way to bypass Global Distribution Systems (GDS), which was its original purpose, and more as part of a hybrid solution. That is, airlines increasingly recognize the value of working with content aggregators and plan to distribute NDC content through both GDS and aggregators. (Refer to page 8, "Offer and order management: recent history and current potential", for additional details).

According to our survey, in fact, 95% of airlines intend to provide NDC content via these channels, even as 68% aim to reduce GDS dependency within the next three to five years. Simultaneously, airlines will maintain EDIFACT for traditional fare distribution. (EDIFACT, formally the Electronic Data Interchange for Administration, Commerce and Transport, has been the global standard for electronic data interchange used by airlines since the 1980s). For instance, in April 2024, Delta Airlines[4] announced its NDC adoption strategy, emphasizing a dual approach that retains EDIFACT content while avoiding GDS surcharges.

These are sound moves. **However, they may also be distracting airline leaders' attention from the larger issue: the strategic overlay that puts all these activities in perspective.**

> NDC is a complex topic. It requires every partner to change their processes. NDC originally was sold like you turn it on; you plug it in, and the world opens to you. It's not like that. It requires changes of processes, and that requires investment. We are continually struggling with how to allocate our scarce resources. That's a challenge for agencies too.
>
> — **Jenni Suomela, Vice President, Global Sales & Channel Management, Finnair[5]**

Offer and order management: recent history and current potential

Global Distribution Systems (GDS) have long served as the primary platform linking airlines with travel agents and other providers, offering a standardized, one-size-fits-all approach to booking and distribution. While effective in achieving broad reach, these systems restrict airlines' ability to differentiate offerings, customize pricing, or deliver personalized products. This legacy approach constrains retail innovation, leaving airlines dependent on traditional processes.

In 2012, NDC's introduction gave airlines greater control over their content, enabling dynamic, personalized product offerings directly to customers while bypassing some of GDS's restrictions. However, NDC adoption has primarily enhanced the front-end retail experience and has not yet fully transformed underlying operational processes such as Passenger Name Records (PNR) and e-ticketing systems, which remain pervasive.

> OOSD systems herald the next leap forward by integrating retail, merchandising and post-booking services seamlessly.

Following the introduction of NDC, ONE Order[a] framework was launched in 2015. The Framework consolidates multiple record-keeping systems into a single order with one reference number, much like an online retailer manages all purchase details (prices, shipping details, and additional services such as gift wrapping) under a single order. This approach will allow customers to manage changes or add-ons conveniently in one place.

> It promises to empower airlines to deliver tailored, end-to-end customer experiences at scale, make real-time adjustments, modernize operations and redefine their customer relationships.

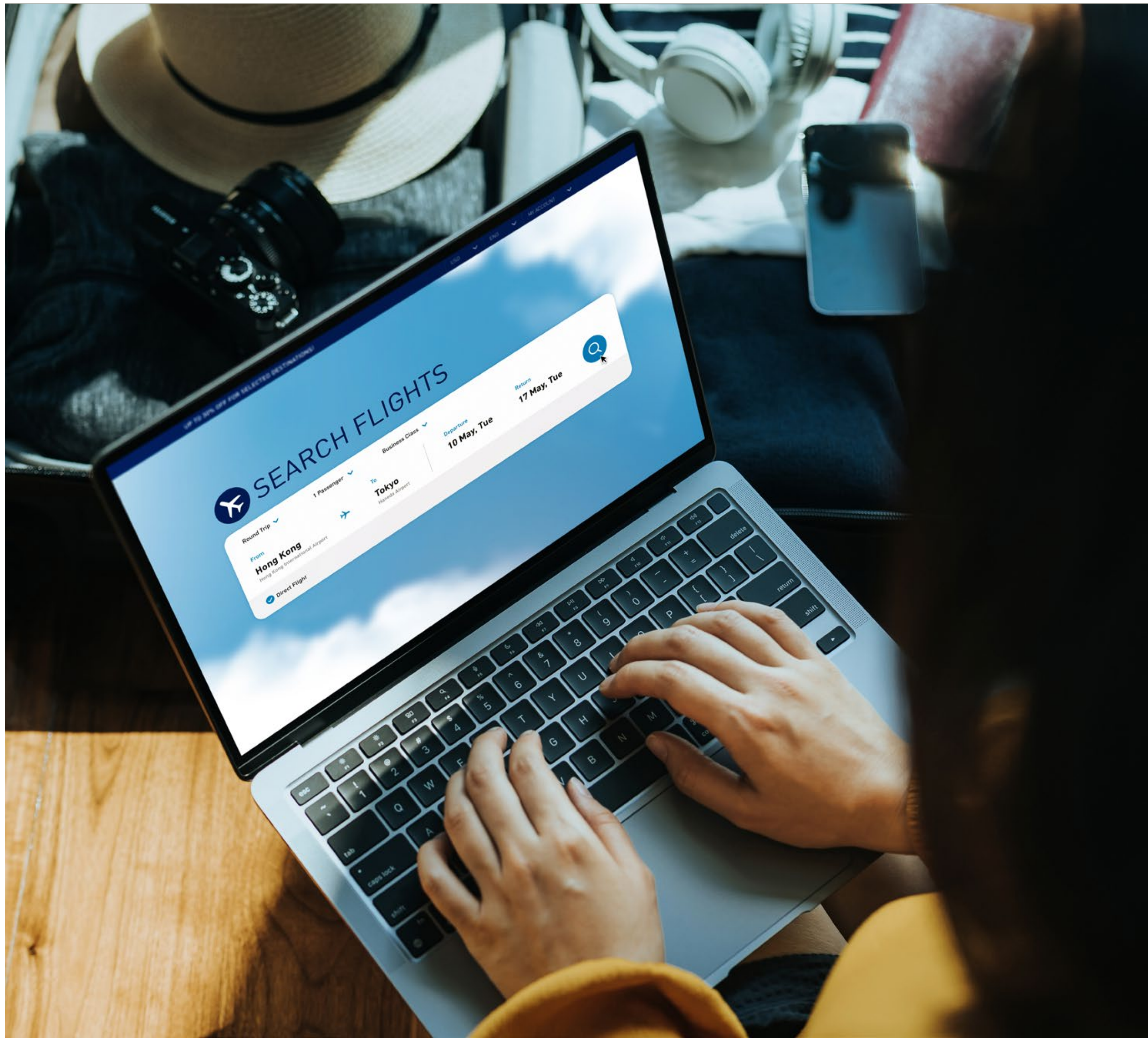
And in doing so, it will allow airlines to differentiate themselves in the market, by creating meaningful, loyal customer relationships that grow stronger over time—**if airlines seize the strategic opportunity before them**.

C-suites prioritize offer management though order management may warrant more attention

For example, consider offer management versus order management. Understandably, C-suite executives tend to prioritize offer management over order management, as offer management can deliver short-term revenue growth. A majority of executives in our survey (60%) identified pricing, promotions and personalization as the most impactful elements in shaping traveler experience. And 63% of executives said they were focusing on offer creation and 48% emphasized the development of new products to drive differentiation within the next two years.

> However, while offer management drives personalization and engagement, effective order management is essential for sustaining profitability by transforming complex offers into seamless operational outcomes.

Order management in the airline industry is often misunderstood as a cost-focused function. In reality, it holds greater strategic value. For example, integrated payment systems and seamless checkout processes boost conversion rates and foster long-term customer relationships. Unlike personalized offers that create one-time engagement, robust order management ensures long-term operational efficiency and customer loyalty.



Order management challenges and potential

Leading airlines, as highlighted at the 2024 International Air Transport Association (IATA) World Financial and Passenger Symposium[6] aim to begin processing orders by 2026, with some targeting 2025. However, Accenture's findings show significant gaps, with 53% of airlines lacking a dedicated order management system (OMS)[b] and hesitating to invest in a full-scale transformation. Among those with OMS solutions, 31% use in-house systems, while 16% rely on commercial off-the-shelf systems. Most airlines have integrated these systems with existing passenger name record (PNR) and Ticket (TKT) architectures, but such hybrid setups are not designed to serve as primary systems for order booking, servicing, delivery and settlement.

Moreover, significant gaps remain in integrating loyalty programs and third-party systems, limiting seamless customer experiences and operational efficiency. These challenges slow progress toward direct distribution and prevent airlines from leveraging order management's (OM's) strategic potential to drive efficiency, competitiveness and revenue growth.

> On a positive note, payment systems show the most progress, with 72% of airlines achieving integration.

However, a $14 billion[7] untapped revenue opportunity highlights the industry's potential to optimize payment processes, enhance integrations and improve overall efficiency.

How integrated is OMS across various systems?

OMS integration remains uneven across key airline systems, limiting operational efficiency and the ability to deliver seamless customer experience (see sidebar “Percentage of airlines reporting integration status” for detail). According to Accenture’s C-suite survey, integration levels vary significantly.

While payment systems lead the way with 72% of airlines achieving full integration, significant gaps remain in other areas such as loyalty programs, sales channels, and third-party ancillary systems. This uneven integration hinders the delivery of seamless, personalized customer experiences and reduces operational efficiency.

Percentage of airlines reporting integration status

System	Fully integrated	Partially integrated	Not integrated
Payment systems	72%	27%	1%
Loyalty programs	38%	56%	6%
CRM	60%	38%	2%
GDS	35%	61%	4%
NDC standards	47%	50%	3%
Sales channels (website, mobile app, travel agent and OTA systems)	43%	52%	5%
Third-party ancillary systems	35%	53%	12%

Under IATA's Modern Airline Retailing[c] (MAR) framework, the shift to "100% offers and orders" makes payment systems a mission-critical aspect of the customer experience[8]. Expanding payment options not only boosts conversion rates, as highlighted by IATA, but also requires seamless collaboration between distribution and finance teams. This synergy is essential to achieving long-term success and unlocking maximum value.

The barriers to progress are varied. One is the persisting reliance on manual servicing. Just 8% of airlines have fully integrated real-time updates into their servicing workflows, while automation with PNR/TKT remains incomplete. For instance, in a fully integrated system, special requests—such as flight changes for a family of four—can be processed online instantly. The system would automatically update the order, notify airport staff and ensure timely service delivery. Yet, most airlines still rely on manually initiated back-end processes, with even online requests often requiring human intervention. This leads to delays, inefficiencies and an increased risk of errors.

To address these inefficiencies, airlines are prioritizing service catalogs, with 95% planning or developing them to enhance order management. However, only 13% have successfully scaled these efforts across operations, revealing a critical gap between intent and execution.

And that sort of barrier ultimately folds up into the larger issue: a lack of funding. C-suite executives, faced with significant capital commitments such as aircraft procurement, are hesitant to bet on large-scale OOSD transformations. Their financial caution is further compounded by uncertainties surrounding the maturity of current solutions and doubts about their effectiveness in addressing operational challenges.

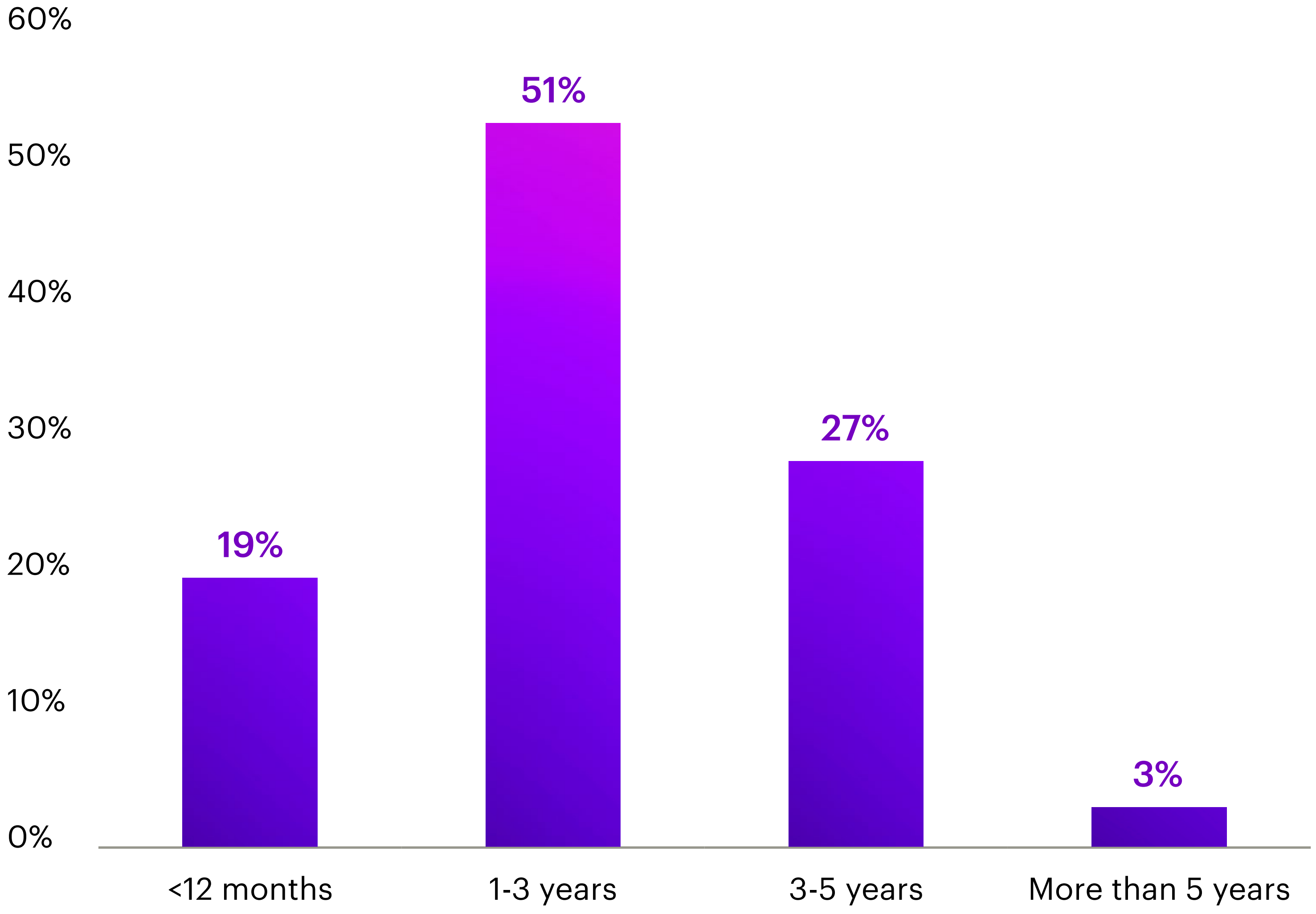
Additionally, many airlines approach OOSD transformation with an IT-first mindset, focusing on vendor selection without considering the business capabilities required or evaluating their current "As-Is" state. This misstep often results in fragmented solutions that fail to meet long-term customer and operational needs.

Reactions: Rising to the challenges

The path to success involves folding tactical wins into transformative goals. Under pressure to transform into retailers, airlines are adopting a dual approach: pursuing immediate tactical gains while laying the groundwork for broader technology transformations.

However, many airlines frame these challenges as IT deficiencies rather than addressing deeper business capability gaps. This misalignment often results in short-term wins that fail to scale or drive meaningful change. For instance, 51% of executives plan to complete offer and order transformations within 1–3 years, while 27% expect it to take 3–5 years, due to complex integrations or phased rollouts. Yet, legacy systems, skill gaps, integration hurdles and the need for substantial investment create bottlenecks, making this optimism unrealistic without a comprehensive strategy.

Chart 1:
Expected timeline for completing offer and order transformation



Coexisting with legacy systems

Despite plans for modernization, 44% of airlines still depend on GDS for 51–75% of bookings, necessitating a balance between legacy systems and NDC. This coexistence—where EDIFACT supports fare distribution, ticketing and inventory—creates operational complexity, with airlines relying on EDIFACT for traditional fare distribution while exploring NDC for dynamic pricing and personalization.

A centralized channel management approach—differentiating channels by strategy and content rather than format (e.g., NDC vs. EDIFACT), could help harmonize legacy and modern systems, enabling advanced retailing capabilities without sacrificing existing operational frameworks.

The vendor dilemma

A significant barrier to progress is reliance on IT vendor platforms, many of which are not yet OOSD-ready at scale. 95% of airlines depend heavily on these platforms, which can create bottlenecks if solutions are misaligned with operational needs. Larger airlines mitigate risks with multi-vendor strategies, while smaller carriers often favor one-stop-shop solutions for simplicity.

Given that most airlines rely heavily on IT vendor platforms, a critical question arises: Are these vendors truly OOSD-ready at an industrial scale? In many cases, they are not.

While IT upgrades are essential, they cannot drive transformation on their own—business capabilities must take the lead.

The challenge lies in the lack of complete, well-defined business capabilities. Without robust frameworks and empowering commercial teams to design and deliver customer-centric products—rather than simply market pre-built offerings—operational constraints will persist. While tactical gains and IT improvements are important, they cannot replace addressing these foundational gaps. Until airlines address this disconnect, the goal of seamless, integrated servicing experiences will remain out of reach.

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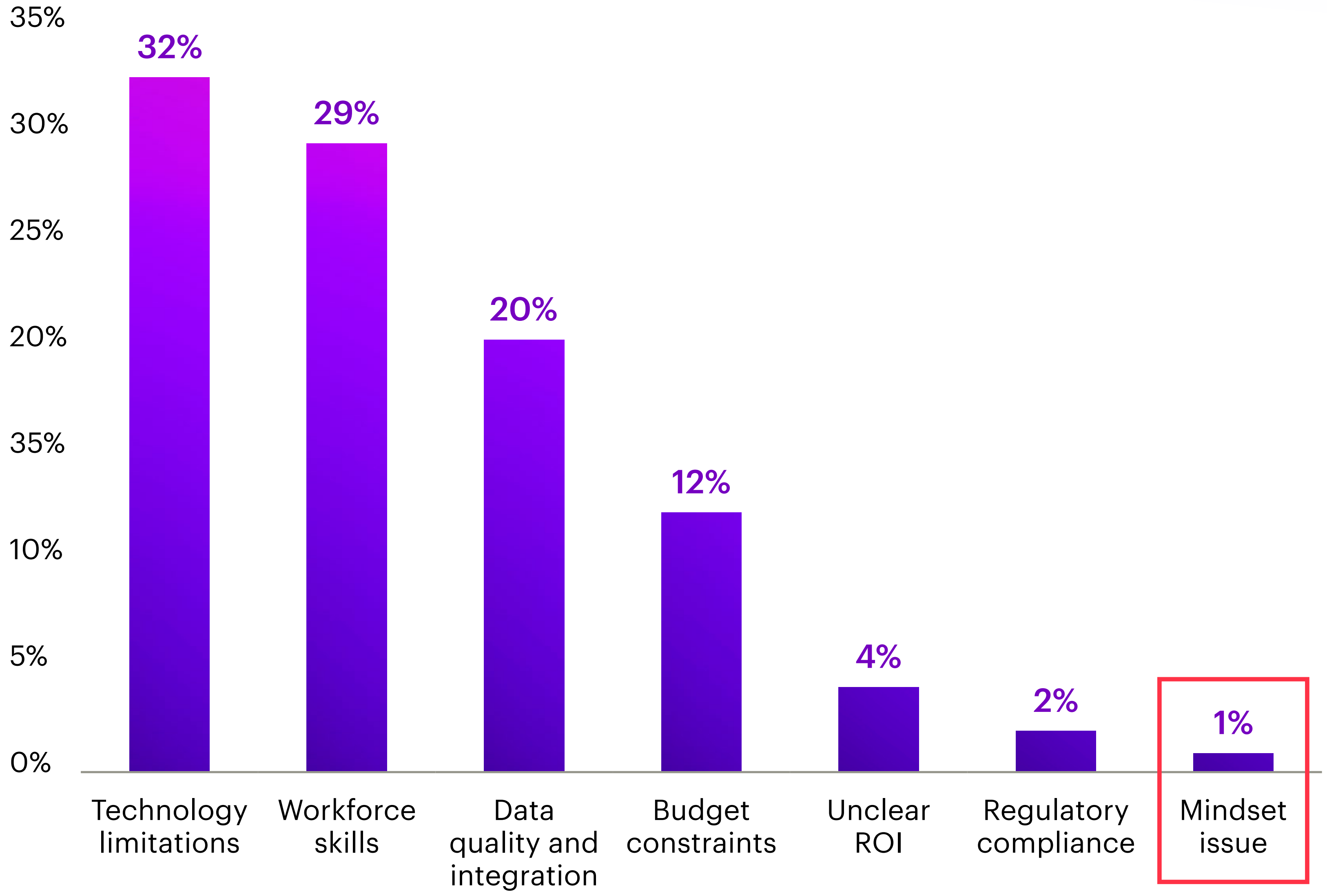
Transformation hurdles: what executives say

Our survey underscores this disconnect: Technology limitations (30%), workforce skills (29%) and data quality issues (20%) ranked as the biggest hurdles in delivering seamless, integrated servicing experiences. **Surprisingly, only 1% of executives point to a mindset issue, underscoring the need for greater leadership introspection and alignment to address the root causes effectively.**

While airlines have clear transformation ambitions, the primary hurdle lies in achieving a holistic organizational mindset shift. Realizing the efficiency and customer-centricity needed to become modern retailers require more than technological upgrades—it demands reimagining business processes, fostering cultural change and addressing key challenges like financial constraints and workforce upskilling.

Chart 2:
Offer and Order reinvention challenges:
Percentage of executives ranking the challenge first in importance



Addressing immediate pain points is crucial for long-term success

In the short term, airlines are pursuing tactical wins to deliver quick value within budget constraints. These include—optimizing payment processes, using data and AI to enhance customer experiences and refining product bundling. While these initiatives deliver incremental value within budget constraints, they fail to resolve deeper structural challenges or simplify complex operations.

Data readiness – gaps in integration and analytics

A key barrier to transformation is the integration of siloed data systems. Airlines must align legacy systems with modern platforms to achieve a unified view of the customer journey. Many are building offer and order management (OOM) structures alongside existing PNR (Passenger Name Record) and TKT (Ticketing)-based Passenger Service Systems (PSS), adding complexity to already fragmented data flows.

Managing this parallel ecosystem requires extensive data synchronization and transfer, such as extracting data from PSS into a Central Data Platform. Despite these efforts, 37% of airlines surveyed feel neutral or underprepared for this transition, with many lacking a clear roadmap for execution.

> Real-time data processing, security and privacy remain key challenges, with 69% of airlines highlighting these prominently.

Airlines are striving to integrate their data systems with third-party platforms and technology partners to support NDC and OneOrder. However, only 52% report having moderately robust integration capabilities—typically limited to PNR and ticket information, which are easier to access—allowing basic connectivity but with inefficiencies and limitations. In contrast, 27% of airlines report very robust integration, enabling seamless data exchange, real-time updates, personalized offers and optimized OM capabilities.

Key data-related challenges

Data privacy and security concerns	69%
Prioritizing real-time data processing	69%
Struggling with data integration from multiple sources	61%
Data quality and accuracy	60%

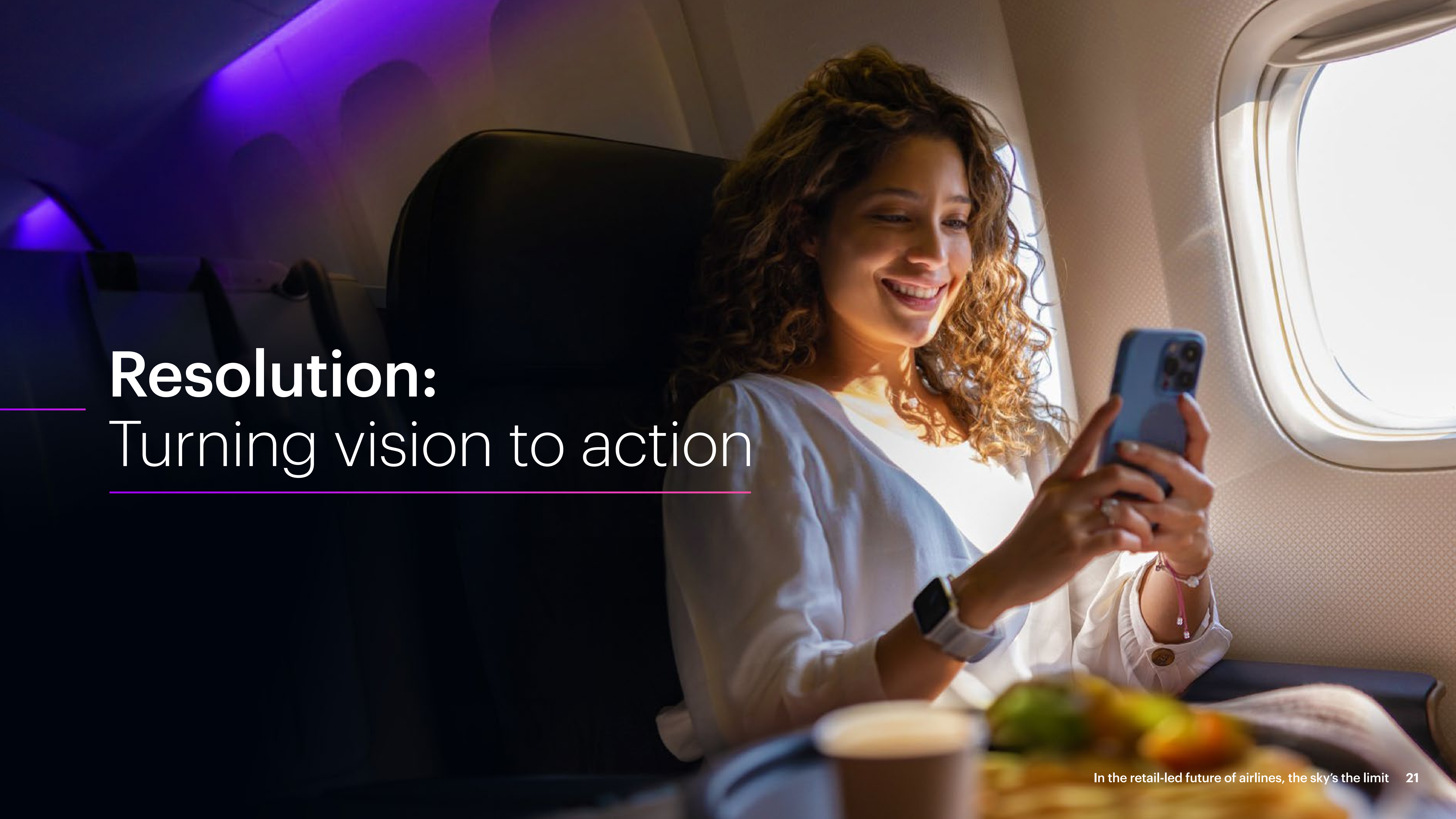
Only 6% of airlines fully utilize analytics, with fragmented data hindering optimization of the Offer, Order, Settle, Deliver (OOSD) process. Achieving lasting change requires bold transformations, including a unified offer engine with decoupled pricing, a primary order booking structure and the modernization of systems like PSS and GDS.

> While these efforts are complex and costly, they are critical for aligning business and IT priorities to drive growth, boost loyalty and create future-ready operations.

IATA reports[9] strong momentum in airline transitions, with three major groups set to process their first orders within two years. However, many airlines remain uncertain about the path forward. Achieving this vision requires clarity, decisive action and a roadmap that addresses immediate challenges while driving long-term transformation. Read on to learn how to navigate these challenges and chart a course for success.

Airline executives' top objectives for offer and order management over the next two years as per our survey

48%	Launch new products, enhance product and service differentiation
19%	Enhance customer personalization, revenue uplift
16%	Develop and strengthen ecosystem partnerships (i.e., travel agencies)
11%	Reduce operational costs (distribution, IT, etc.)
5%	Better control over inventory and offer management



Resolution:
Turning vision to action

To capture the full value at stake, airlines must embrace transformation as a continuous journey rather than a one-time overhaul.

By balancing rapid innovation with a phased approach, airlines can deliver immediate value while maintaining momentum for long-term success. Prioritizing the traveler experience is key to ensuring every phase of the transformation drives competitive advantage and operational efficiency.

Key steps for achieving this include:

1

Commit to a retail mindset

Foster a culture of innovation that aligns with evolving customer expectations, enabling frequent and agile updates to processes and offerings.

2

Leverage industry standards

Use frameworks like OneOrder and NDC as foundational tools while developing unique strategies to differentiate in the marketplace.

3

Define core objectives

Align organizational priorities with clear goals, identifying the capabilities and resources needed at each stage of transformation.

4

Design a multi-phase journey

Develop a realistic roadmap with incremental milestones, where each phase delivers tangible value and strengthens organizational momentum.

This strategic pathway allows airlines to approach transformation as an achievable, continuous journey—progressing steadily toward a modern, customer-centric retail model that drives growth and competitive advantage.

Defining the roadmap for a successful transformation

Is it worth it?

Our analysis of multiple airlines show a total value opportunity of 3-6% annual revenue

Offer optimization	New business models	Customer experience	Simplification
~30%	~20%	~30%	~20%

1.5-3x force multipliers ← Human-centered design — Data and AI/Gen AI →

Accenture Proprietary research

To capture the full value at stake, airlines must undertake significant structural changes that redefine how they operate and interact with customers. Key reinvention elements form the backbone of this roadmap, each driving specific outcomes essential to success:

	Transformation drivers	Outcome: Building the airline of the future
Reinvention elements	New product launches	Accelerating product launches through effective inventory management
	Enterprise-wide process simplification	Streamlined processes enhance efficiency and foster organizational agility
Levers to change	OOSD architecture	A robust offer, order settle deliver (OOSD) to enable seamless integration and scalability
	Data accessibility	A unified data system that empowers informed, data-driven decision-making across the airline
	AI-driven processes	AI to improve customer experiences and to boost operational efficiency

To achieve transformative goals, the C-suite must own a strategic mandate focused on high-impact priorities. Success starts with a clear vision that identifies value within the airline and outlines a roadmap to realize it. Leaders should consider seven key questions to define their vision and strategy:

1. **Is the scope and impact of transformation clearly defined for your brand?**
2. **How will your technologies—current or new—drive value, and are you ready to select the right vendors, even as you transition from legacy systems?**
3. **Do you have a phased transition plan that starts small to mitigate risks while maintaining agility?**
4. **Does your operating model align with value-driven objectives and overarching transformation goals?**
5. **Are you embedding reengineering into your transformation plan to ensure lasting impact?**
6. **Have you addressed the skills and training needed for successful execution?**
7. **Do you have the capability to maneuver in a multi-year engagement with changing internal and external environments**

Saudia transforms with Nevio[10]: A next-gen travel revolution

Saudia is transforming into a fully integrated, traveler-centric retailer by partnering with Amadeus and leveraging the Nevio platform for end-to-end retailing, servicing, and delivery.

> Through integration with partner services—such as hotels, airport facilities, and destination activities—Saudia aims to offer seamless, personalized travel experiences.

Nevio's dynamic pricing capabilities allow the airline to create tailored packages, providing travelers with flexibility and competitive options.

This transformation also modernizes Saudia's digital touchpoints, contact centers, and airport service points, enhancing self-service options. For instance, travelers can conveniently add or adjust ancillary services via the airline's mobile app. Beyond adopting new technology, Saudia is redefining customer engagement by delivering a seamless, personalized, and innovative travel experience that sets a new industry standard.

Qantas[11] takes flight with a hybrid distribution model

Qantas is taking a pragmatic approach to modernizing airline retailing, addressing operational hurdles and legacy constraints. Scheduled to launch in mid-2025, its new distribution model merges traditional systems with NDC, delivering greater flexibility and personalization for travel agents and bookers.

The model offers four booking channels: EDIFACT via legacy systems, standard NDC via GDS, standard NDC through technology partners and the Qantas Distribution Platform, and an exclusive premium NDC option for select agencies. With surcharges of $13 per segment for EDIFACT and $3 for NDC via GDS, the airline incentivizes a shift toward more efficient channels while recovering indirect distribution costs.

> Qantas merges traditional and modern retailing to support partners and enable long-term innovation - this hybrid approach balances operational efficiency, customer personalization, and cost optimization.

How Accenture can help?

Accenture's capabilities in offer and order management are built on a foundation of deep industry expertise, trusted vendor relationships and proven success in large-scale transformations. With a strong focus on navigating complex environments and building robust foundations, we are able to prioritize, create and unlock new impact for customers. Our strategy, initiative design and delivery planning have already driven some of the ongoing full Offer and Order Management System (OOSD) implementations, showcasing our ability to turn your vision into reality.

Our holistic approach ensures that airlines are not only equipped with the best technology but are also positioned for long-term success through a new, agile and data-driven operating model. With the right set of considerations, airlines can unlock billions in potential value, transition seamlessly into a future-proof ecosystem and emerge as industry leaders in a rapidly evolving market.

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a) As per IATA's definition, ONE Order is an XML-based standard that combines these multiple records into a single retail and customer-focused Order. Its aim is to remove inefficiencies inherited from paper-based processes and facilitate communication between airlines' Order Management, Revenue Accounting and delivery providers.

b) OMS includes PNR, TKT, Super PNR, and Order logic.

c) Modern Airline Retailing

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We sincerely thank the following subject matter experts for their invaluable insights and contributions: **Philippe Gallois, Bas Nieman, Dan Giles, Jamie Yates, Natalie Nehme, Ray Stetter, Aaron Yu Qi, Zach Donaldson, Chuck Maahs, Tyson J. Wipperling.**

We also extend our gratitude to the following team members for their valuable contributions: **Sandra Najem, Gerry Farkova, Bridget Connelly.**

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