SITA

AIRPORTS OF THE FUTURE: BAGGAGE OPERATIONS

Twice as many passengers by 2043.
How will airports cope?

Digital transformation is the answer

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This white paper covers the challenges, key trends and factors that will affect baggage operations at future airports.

A more comprehensive white paper covering airport-wide issues at future airports is also available. We have also published two further white papers covering the specifics of Passenger Processing and Airport Operations at future airports.

SITA: YOUR PARTNER

We are the world leader in digital travel

Ubiquitous

Over

1,000

airports with a SITA presence.

500+

airlines and ground handlers at over...

2,800

airports use SITA's WorldTracer baggage tracing solution.

Industry-leading footprint

We have biometric solutions in service all over the world. Including Tier 1 airports such as Beijing (PEK) and Bangkok (BKK). And more than 600 biometric-enabled systems deployed in the US, serving almost every airline with international operations.

End-to-end biometric expertise

In use at more than 40 airports worldwide. Including around 5,000 biometric touch points.

Unique in the industry

We have already proven delivery of an end-to-end seamless digital journey. From home to hotel.

EXECUTIVE SUMMARY

The air transport industry is going through its most significant period of change since the rapid and widespread adoption of the internet in the early 2000s.

Challenges

Passenger numbers will double over the next twenty years, but airports simply can't expand at that rate. So they will have to do more with what they already have, reducing friction, optimizing operations, and speeding up the passenger journey.

Key Trends

And that's precisely what they're doing. Airports everywhere are adopting and investing in smart technology. Airport-wide, they're leveraging advances in mobile, artificial intelligence, networks and connectivity, cloud computing and APIs, and not forgetting the push towards net zero.

Airport operations are being transformed by developments in robotics and automation and predictive maintenance, and by the gradual move towards total airport management (TAM).

Future airport

All of this will lead over the next decade towards the future airport. A fully interconnected airport, with a 360 degree vision of data, processes and opportunities. Airports will face increased passenger demand but they have a limited ability to build airport infrastructure or increase the number of aircraft. Instead they will turn to measures that make them more efficient and improve the passenger experience.

CHALLENGES

Post-pandemic, passenger numbers have surged back with remarkable vigor. They already exceeded pre-pandemic levels in 2024, and are expected to surpass 5 billion for the first time in history in 2025. Also in 2025, the number of flights globally is forecast to exceed 40 million for the first time[1].

40 MILLION

flights globally forecast in 2025

7.9 BILLION

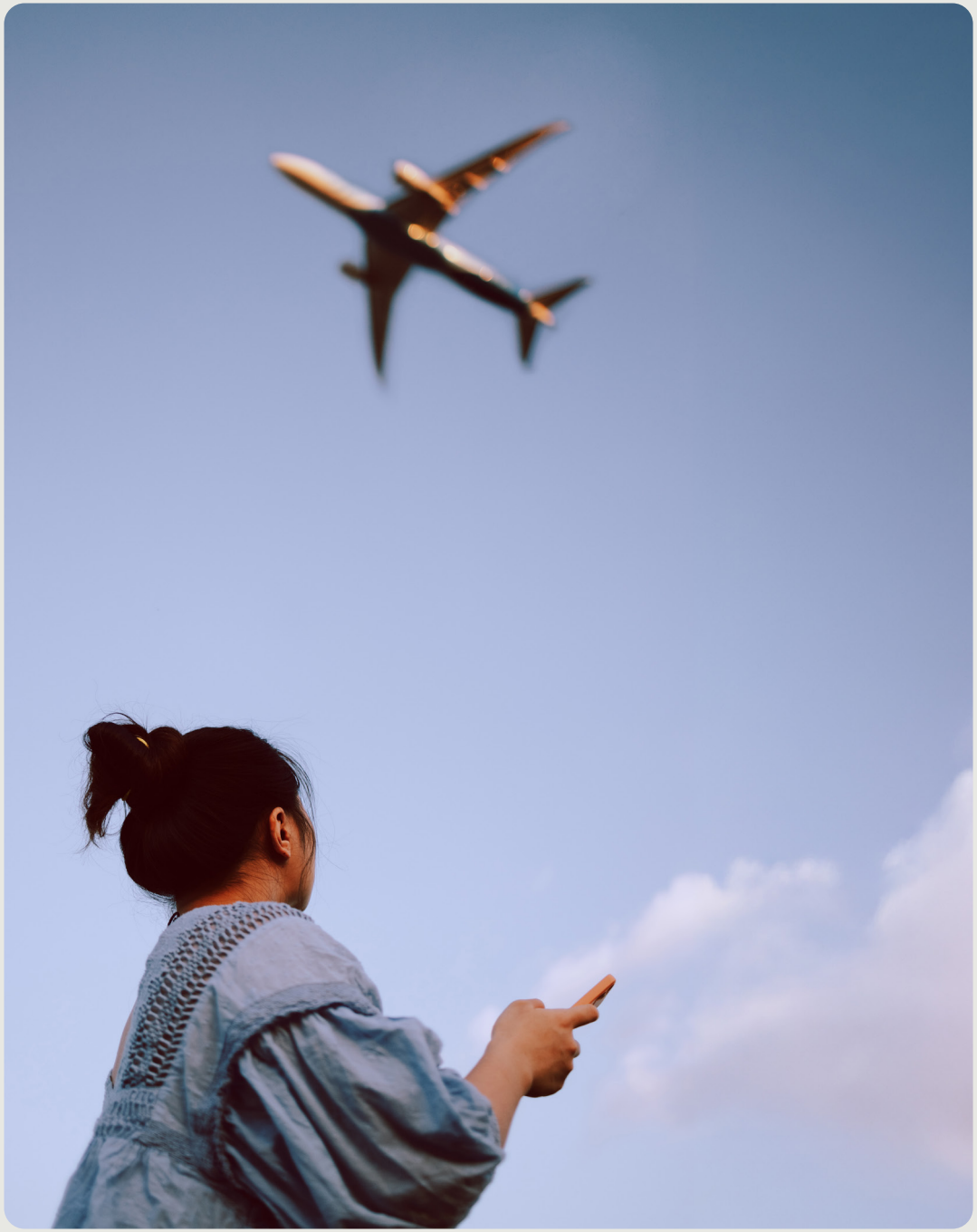
passenger journeys predicted in 2043

In the twenty years between 2023 and 2043, passenger traffic will more than double. With a net addition of over 4.1 billion passenger journeys, IATA predicts a total global number of 7.9 billion in 2043. And that's just the baseline prediction; it could be significantly higher[2].

Even pre-pandemic, airports everywhere were struggling to deal with increasing passenger demand. Issues of aging infrastructure and the need to address climate change don't help.

Post Covid, experienced staff who left the industry during the pandemic never came back. In SITA's 2024 Air Transport IT Insights Survey[3], 'retaining and recruiting IT staff' is cited by a third of airports as being their biggest IT and data challenge.

[1] https://www.iata.org/en/pressroom/2024-releases/2024-12-10-01/
[2] https://www.iata.org/en/publications/economics/reports/global-outlook-december-2024/
[3] https://www.sita.aero/resources/surveys-reports/air-transport-it-insights-2024/



On a broader note, we asked airports to name their biggest specific challenges. They said: “the balancing act between developing and deploying new innovative technologies (such as AI and biometrics), while also trying to maintain and upgrade infrastructure, engage in effective digital transformation, and updating legacy systems”. They will of course also be trying to maximize retail opportunities across the airport.

The biggest physical challenge, or course, is that airports can’t simply double in size, to handle twice the volume of passengers. It’s difficult and expensive. But quite apart from the vast CAPEX costs required, most airports lack the physical space – and the political support – to expand their footprint indefinitely.

Instead, airports will need to find new ways to handle more passengers within the same space. They will need to adopt a whole raft of smart new technologies – including advanced self-service, mobile apps, automation, biometrics, AI, data and systems integration, and secure off-airport solutions. They also need to work to create an ‘agile and flexible work structure’, cited by almost a third of airports surveyed as a challenge. So that existing staff can be freed up to be where airports need them most, driving faster processing for passengers once they arrive at the airport. In so doing, airports will improve their processes, and empower their people.

Over the next decade airport evolution will lead to a complete transformation of the airport experience. Making operations more efficient and enabling a whole new range of new revenue streams to maximize airports’ profitability and sustainability.

KEY TRENDS IN BAGGAGE OPERATIONS

In a perfect world, every piece of baggage would be seamlessly tracked and managed, and bags would never be mishandled. And that is exactly what the world of baggage operations is trying to achieve, through a remarkable journey of technological transformation, turning complex logistics into a sophisticated, intelligent ecosystem.

“Over the past two decades, we’ve seen investments in baggage management systems pay off spectacularly, with a steep drop in the mishandling rate. Back in 2007, 18.9 bags were mishandled per thousand carried; a number that dropped to 6.9 per thousand in 2023.”

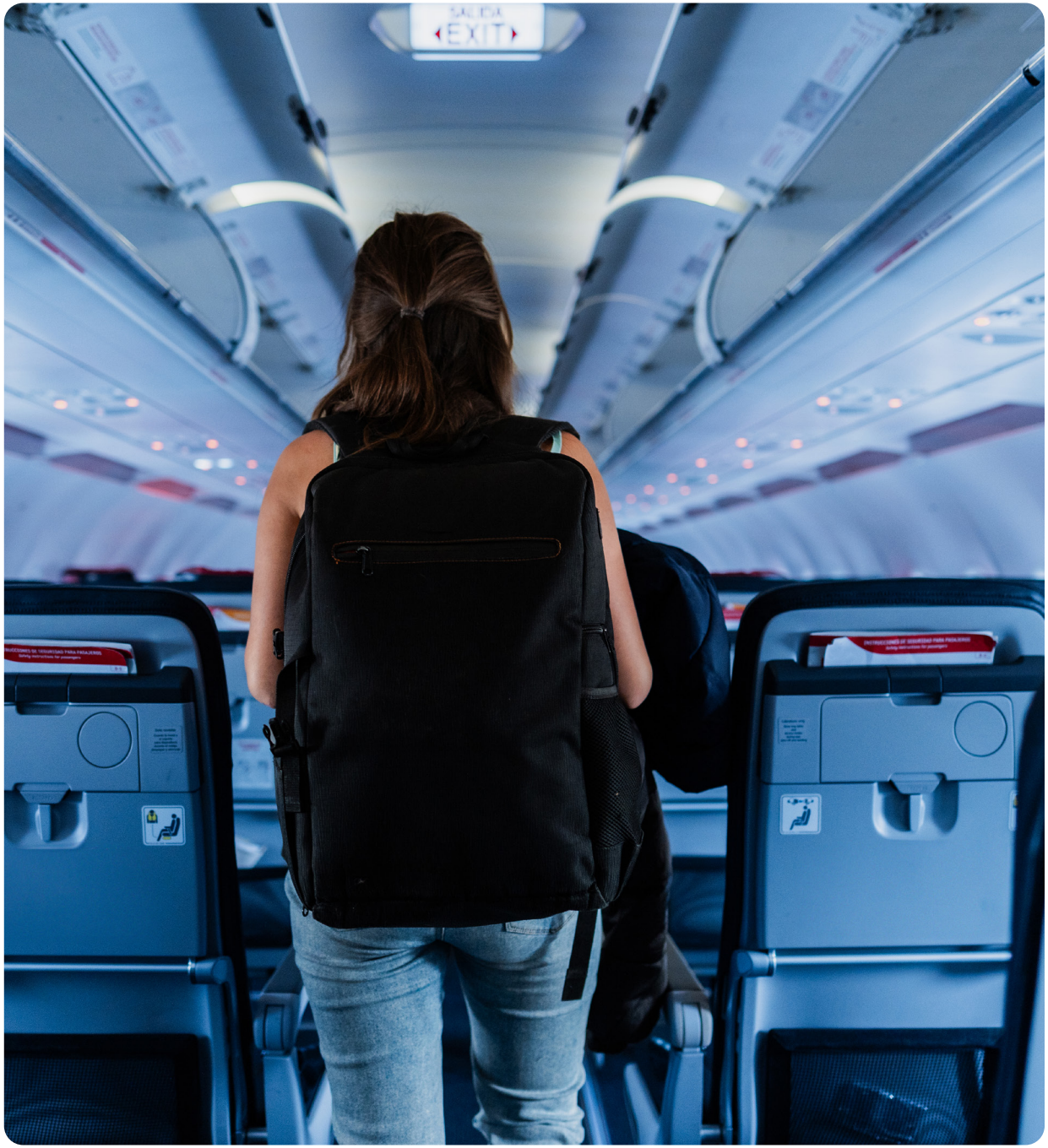
Nicole Hogg
Director, Product Management, Baggage, at SITA.

Recent progress has confirmed the trend, with baggage mishandling rates falling 9.2% year-on-year between 2022 and 2023, despite the resurgence of passenger traffic, which saw a 30% increase year-on-year[4].

That's largely down to the industry doubling down on digitalization, with 49% of airports investing in baggage processing as part of their business initiatives, and 20% now using AI tools or initiatives for baggage management[5].

Baggage automation and visibility is on the increase, and new developments such as AI and computer vision technology will help. But there are still hurdles to overcome. These include needing improvements:

- At check-in handover, to reduce initial mis-routing
- At the aircraft, where loading needs to ensure correct bag placement
- At the transfer area, to make sure bags make it onto the next flight
- At the collection belt, to ensure smooth baggage delivery



[4] https://www.sita.aero/resources/surveys-reports/air-transport-it-insights-2024/
[5] https://www.sita.aero/resources/surveys-reports/air-transport-it-insights-2024/

TRACKING AND TRACING

IATA Resolution 753 mandates comprehensive tracking at key points, and both airports and airlines are now set on giving passengers complete visibility and control over their baggage journey. New investments in baggage management systems will mean more baggage delivered on time; while advanced tracking systems allow real-time monitoring and swift recovery of mishandled bags. So passengers will know where their baggage is – and experience less disruption if it does get mishandled.

Airports and airlines are also actively working on initiatives to collect more data, and they're planning on doing much more by the end of 2026. Data collection and sharing initiatives have been adopted by 93% of airports at bag delivery and 95% of airlines at bag collection[6].

[6]https://www.sita.aero/resources/surveys-reports/sita-baggage-it-insights-2024/

Passenger behaviors

Passengers essentially want as much visibility as they can get, concerning their baggage, all the way from home to their destination. That's why it's so important to build trust and encourage the use of digital tools to offer full visibility and improve passenger communications.

Increasingly, passengers are embracing self-service technologies to gain more control over their travel journey, and baggage is no exception. They see value in services such as baggage tracking on their mobile devices[7]. They welcome technology solutions that increase their confidence in the whereabouts of their bags – especially when delays occur, which account for 77% of mishandling cases[8].

When it goes wrong

Some bags inevitably end up being mishandled (although they are incredibly few, as a proportion of the total, with global figures well under 1%). The problem is primarily addressed by SITA WorldTracer, the de facto industry standard – chosen by over 500 airlines, and in use at around 2,800 airports. WorldTracer operates seamlessly and allows airlines to track baggage for up to 100 days, with 60% of mishandled bags being returned to their owners within 1.6 days.

SITA WorldTracer Auto Notify lets passengers know straight away if their baggage doesn't make it onto their flight, so they're not wasting time at the carousel on arrival.

And it gets better, too. WorldTracer Auto Reflight combines robotics, AI, and sensors so that bags that cannot be transported on the originally intended flight are swiftly and automatically redirected without human intervention. Auto Reflight proactively notifies passengers and collects customer data, also without needing human intervention.

Moving forwards

Emerging technologies such as computer vision and AirTag-like devices are set to further improve baggage tracking. Devices like Apple's AirTag use Bluetooth technology to provide real-time location updates for passengers' bags, enhancing transparency and peace of mind. Airports are also investing in potential RFID-capable bag tag tracking systems, with 56% saying they will do so by 2027[9].

Identification and tracking of baggage will be further improved by leveraging computer vision, with AI-powered cameras creating digital bag inventories. This will enable precise identification and routing of baggage all the way through the airport, from bag drop to loading – and unloading and delivery on arrival.

[7]https://www.sita.aero/resources/surveys-reports/2024-sita-passenger-it-insights/
[8]https://www.sita.aero/resources/surveys-reports/sita-baggage-it-insights-2024/
[9]https://www.sita.aero/resources/surveys-reports/air-transport-it-insights-2024/

AUTOMATION

Automation is increasing in baggage handling in three areas – self-service solutions, automated tracking and tracing (described in the previous section), and automated systems to remove some of the manual work from baggage sorting, routing and distribution.

Airports expect that by 2027...

Self-bag drop will be

Self-service solutions cut down wait times and improve flow. They include touchless, biometrically enabled, single token and other self-service technologies.

Self-bag drop solutions have transformed the baggage handling process. Passengers can tag and drop off their luggage at designated points, minimizing wait times. With biometrics, this also greatly enhances security by linking the passenger's identity to their checked luggage.

The implementation of self-bag-drop increased from 12% to 19% of airports surveyed between 2023 and 2024. Airports expect that by 2027, self-bag drop will be 65% biometrically enabled, and 56% touchless[10].

Singapore's Changi Airport and Kuala Lumpur Airport have successfully deployed SITA's automated bag drops, cutting bag drop times by up to 40%. SITA's latest IPS Self Bag Drop system sets the gold standard for the industry; it can cut baggage processing costs by up to 90% and save 50% in terms of space needed.

In terms of automated baggage handling, automation and robotics will increasingly be used in airports. This will reduce the need for manual processes and also reduce human error, minimizing mishandling further. This will be particularly important during transfers, which represent the single biggest cause of baggage mishandling, accounting for 46% of incidents[11].

[10] https://www.sita.aero/resources/surveys-reports/air-transport-it-insights-2024/
[11] https://www.sita.aero/resources/surveys-reports/sita-baggage-it-insights-2024/

OFF-AIRPORT AND INTERMODAL

Passengers are keen to see new services such as off-airport baggage collection and drop-off services, and airports are investing in technologies that can help make this happen. Simple, connected ways to check-in baggage from train stations, hotels or malls save passengers time, smooth their journey, and help reduce terminal congestion.

28%

Off-airport baggage handling is quickly enabled by SITA's FlexBox, a small footprint piece of technology that's easy to deploy, giving you a simple, connected way to check-in baggage wherever you want.

There are also possible future use cases for baggage decoupling, where baggage travels separately from the passenger. There are however practical and legal issues (over who bears responsibility, for example) which need to be addressed first.

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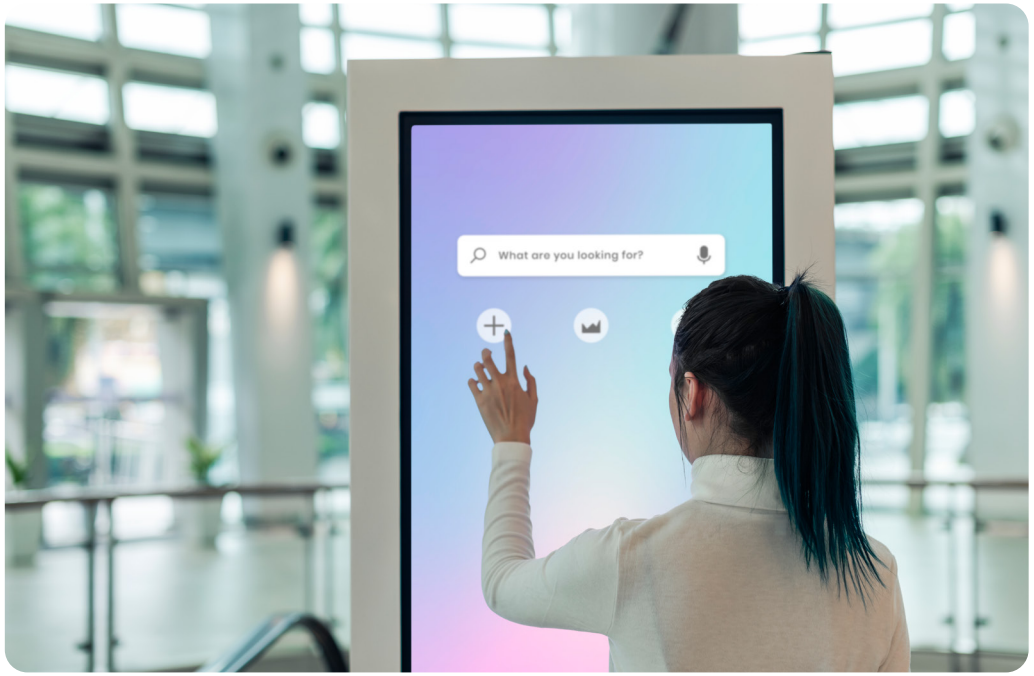
Passenger baggage is still a key issue when it comes to intermodal travel, where air transport is combined with rail or maritime travel, for example. 28% of intermodal travelers say 'being able to drop your baggage at your journey start point and have it arrive at your end destination' would be the most useful 'smart' solution to them[12].

If end-to-end baggage handling solutions existed, 48% of passengers said they would want it collected from the first terminal, while 46% would like it collected from their home or hotel. Only 6% of passengers said they wouldn't be interested in such a solution at all.

[12] https://www.sita.aero/resources/surveys-reports/2024-sita-passenger-it-insights/

SITA AND THE AIRPORT OF THE FUTURE

With strong and sustained passenger growth continuing, airports are well aware of the need to invest in new technology – and the long-term costs of not doing so.

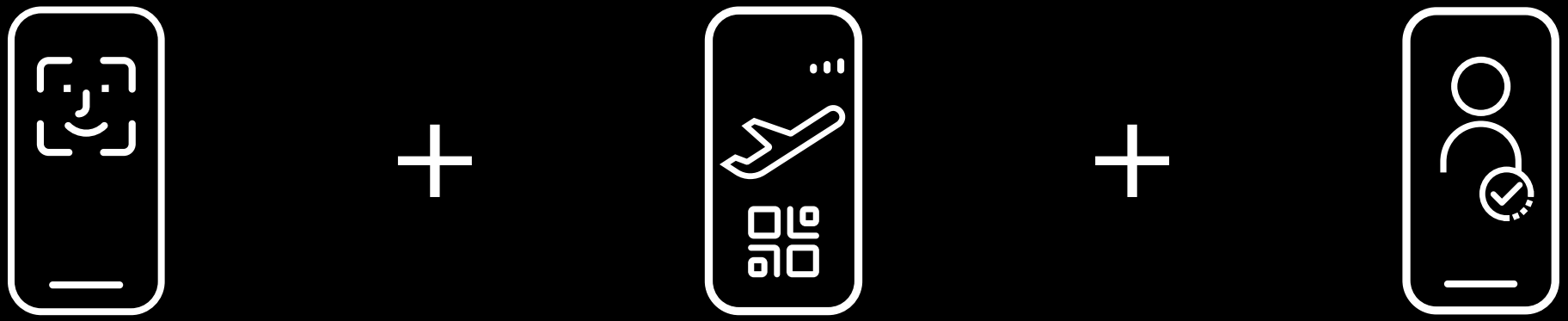


6%

In recognition of this, research shows that they are consistently spending around 6% of global annual revenues on IT investment[14].

The trends and technologies identified in the previous section are already having a positive impact on airports worldwide, but for the most part they are being deployed separately rather than combined. Over the coming decade, however, it's all going to come together, for a fully connected airport.

[14]https://www.sita.aero/resources/surveys-reports/air-transport-it-insights-2024/



APPS

Mobile phones and other hand-held devices are now near-ubiquitous in airports, both in the hands of passengers and staff. Airports will take advantage of this by using apps to carry out more and more complex tasks. Processes that take place on the move will become an everyday occurrence.

The vast majority of passengers carry at least one mobile device, and many of them would happily use them for baggage notifications and baggage tracing.

DATA

Data is the starting point for unlocking airports' potential. With good secure data and detailed insight into customers and operations, airports can harness the power of new technologies such as AI, machine learning, and digital identities to create seamless, secure and safe airports.

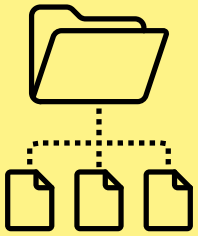
Airports, airlines and their partners are awash with data. Yet it's not always understood, used or shared to its full potential. Especially in airports, who engage with passengers much later than airlines. Passengers want to be connected seamlessly, painlessly to their plane, and helped on to their destination, connections or journey home. But when exactly will they turn up, and with how much luggage? For most airports today, it's guesswork.

ARTIFICIAL INTELLIGENCE (AI) / MACHINE LEARNING (ML)

Airports are already beginning to use AI with some 45% integrating data and a further 13% exploring ways to organize data to support AI initiatives. Almost one in ten airports is already actively training AI with their collected data, but just 2% have so far implemented a Large Language Model (LLM) that feeds into their AI systems[14].

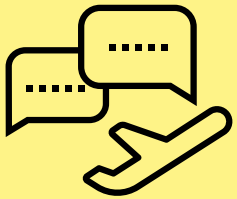
45%

of airports are integrating data



13%

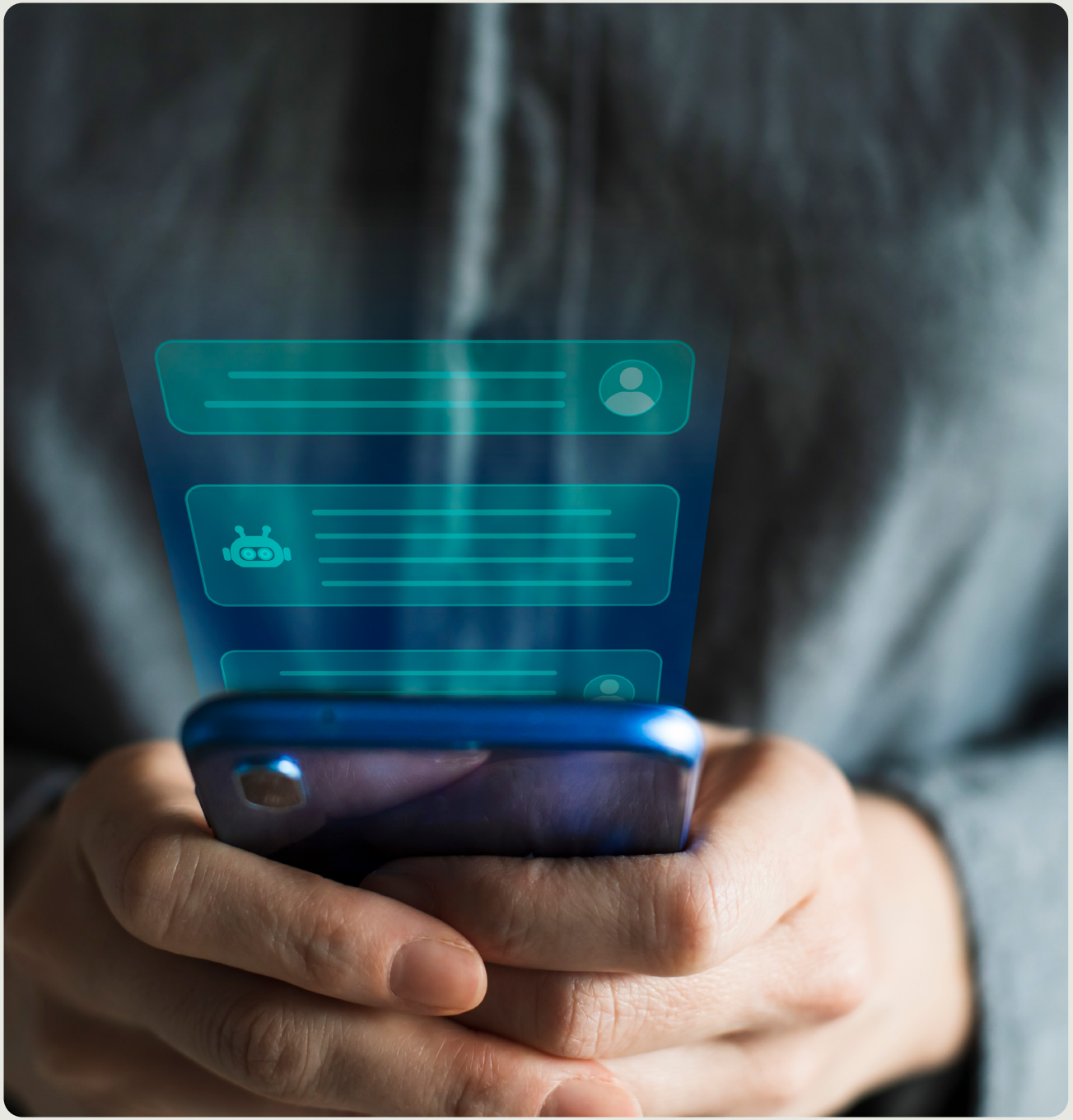
exploring ways to organize data to support AI initiatives



30%

of airports are employing AI tools

[14] https://www.sita.aero/resources/surveys-reports/air-transport-it-insights-2024/



This will all change dramatically in the coming decade, as airports start to use a mixture of generative, assistive, and agentive AI. Generative AI will be used in areas such as flight schedule optimization, terminal design and personalized communications to passengers. Assistive AI will be used for operations center support, predictive maintenance and multilingual assistance, among other areas. Agentive AI for its part will be used in many areas such as improving autonomous baggage handling, and reducing fuel consumption in self-driving vehicles. It will also be used by airports and governments to improve security screening and increase threat detection accuracy.

So it's no surprise to find that AI is an investment priority, with a third of airports surveyed saying AI is a key IT resource focus for 2025, and one in six saying it's their number one priority[15]. One respondent went as far as saying "AI is emerging as an initiative that might impact almost all of the processes in the airport".

At the same time, it's important to note that one in four airports surveyed are still not using AI at all. This highlights significant potential for continued innovation within the sector.

[15] https://www.sita.aero/resources/surveys-reports/air-transport-it-insights-2024/

GROWTH OPPORTUNITIES

There are many areas where billions of dollars of new value can be generated in airports over the next decade, either from increased revenue, reduced costs, or both.

Low-friction walk-through airports

The goal for all airports is to increase capacity without increasing physical space. This can be achieved when passenger-on-the-move biometrics replace all static gates – including security, lounges, boarding and borders, delivering:

- An increase in overall capacity in the same terminal space
- Improved on-time performance through faster passenger flow and boarding
- Reduced resource costs across all passenger journey activities
- Increased retail space and dwell-time, enhancing non-aeronautical revenue

Increased resilience and up time

Future airports will use robotics to increase resource availability and operational flexibility. This will:

- Enable productivity 24/7
- Support operational resilience
- Improve workplace security and safety
- Reduce down time
- Enable autonomous AI ground services

Shifting boundaries

Airports are already thinking about ways of moving some processes off-airport, and this trend will increase over time. With airport processing distributed over a wide geographical area, airports will reduce the time spent and the friction created by passengers landside. Passengers will then be able to spend more time relaxing airside and taking advantage of shopping and dining opportunities. Airports will benefit from:

- Growth in non-aeronautical revenues
- Increased throughput and capacity
- Early flow information
- Enhanced support for multimodal travel
- Reduced congestion
- Resource and cost savings
- Repatriated airport real-estate

YOUR PARTNER: SITA

We've been working in the air travel business since

1949

AS A TRUSTED VOICE, WE SET THE STANDARD.

- We are the market leader by a very long way
- We understand your world and how to meet your challenges
- We offer unique interoperability and global standards support
- We are the only player working end-to-end, collaborating across all stakeholders
- We offer unrivaled, unbeatable support

We have the market leading solution for integrated airport management. We offer biometric expertise that's scalable to your airport and interoperable with your existing systems, and across borders. And we have biometrics working in some of the world's busiest airports.

We developed the global standard for baggage management and tracking. And we created our first electronic identity system back in 1996 for the 2000 Sydney Olympics.

Combining our solutions and expertise, we're driving towards a future where airports have a comprehensive view across their domain, from whatever perspective they need. A future where passengers have full control of their journeys.

Together, we can transform airports from simple transit hubs into digital, personalized experiences for travelers across the world.

We've done a lot of thinking and what we've discovered is that ideas are easy. It's implementing them in a risk-free way in the live, no-fail, secure airport environment that's incredibly hard.

That's where SITA's experience and industry know-how makes all the difference

We find answers that work.

CUSTOMER REFERENCES / CASE STUDIES

AIRPORTS AUTHORITY OF INDIA (AAI)

In India, SITA is working in collaboration with the Airports Authority of India (AAI) to cloud-enable 44 airports across the country. This is the largest airport cloud-enabled platform in the world, and more than 3,500 self-service touchpoints will be enabled.

The project is a great example of uplifting smaller airports, giving them access to the same capabilities as larger airports. It represents an ambitious shift to adopt smart new technologies, introduce scalable infrastructure, and usher in an intelligent, sustainable tech footprint.

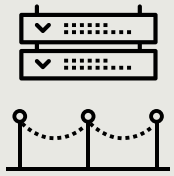
We continue with programs to biometrically enable AAI and other Indian airports, supporting the country's Digi Yatra digital journey program. DigiYatra uses biometrics to enable passengers to verify their identity at various touchpoints, without the need for physical documents. It enhances passenger convenience, reduces waiting times, and improves overall efficiency.

COPENHAGEN

Copenhagen Airport (CPH) is the largest airport in Scandinavia, serving 30 million passengers in 2024. SITA partnered with Copenhagen Airport, Scandinavian Airlines, and Scandinavian Baggage Service to demonstrate revolutionary off-airport passenger processing.

It's based on the SITA FlexBox, a small, simple and versatile touchpoint that opens new opportunities for airports and airlines to process passengers in almost any location. The SITA FlexBox can easily be moved to new, previously difficult locations to reduce congestion and better manage passenger flows.

The SITA FlexBox with Print&Go allows agents and passengers to print boarding passes and baggage tags, and weigh and pay for luggage, if needed, from locations such as hotels or buses to the airport. With a 100% success rate in passenger processing in Copenhagen, SITA FlexBox boosted efficiency and convenience, while also relieving the pressures of day-to-day operations at the airport.



JFK

John F. Kennedy International Airport (JFK) serves over 60 million passengers annually. SITA has been awarded projects at JFK for both the New Terminal One (NTO), as the role of Master Systems Integrator, and Terminal 6, as a passenger processing and terminal operations systems provider. SITA plays a critical role in mitigating risks, ensuring project excellence, and fostering collaboration among multiple stakeholders.

The upcoming New Terminal One is set to become JFK's largest terminal, replacing the existing Terminal 1-3. Once completed, it will set a new standard, delivering over 15 innovative solutions, and offering a world-class experience that enhances connectivity for both visitors and residents of the New York region.

At JFK Terminal 6, the focus is on enhancing passenger processing and operational efficiency through the integration of SITA's Common Use technology and IPS's Self-Bag Drop (SBD) solutions, one of the first sites to feature both solutions. These advancements will streamline check-in and baggage handling, ensuring a seamless and more efficient travel experience.

EASYJET BAG DROP

SITA worked with easyJet and Geneva Airport to let passengers quickly drop sports-related bags, using SITA self-service and ready bag drops. Uniquely, passengers can use self-service to weigh skis, golf bags and surf boards at bag drops. They can use automated P2PE certified payment, too, for any extra baggage. The solution is easily portable to other airports and major sporting events.

LUFTHANSA GROUP

Lufthansa Group and SITA now automate baggage reflighting to manage mishandled bags. Losing a bag during a flight connection can be a frustrating experience for travelers, significantly impacting the overall passenger journey. It's also a costly issue for airlines. Mishandled baggage costs the aviation industry billions annually, with over 36 million bags mishandled in 2024, resulting in losses exceeding US$ 2 billion.

To address these challenges, Lufthansa Group and SITA have joined forces, bringing in digital automation to not only reduce baggage mishandling costs but also enhance the overall travel experience for passengers.

SITA's innovative Auto Reflight solution, an add-on to WorldTracer, automatically reflights left-behind baggage onto new flights without the need for human intervention. Since its implementation at major hubs such as Munich and Zurich airports, the solution has achieved an 80% automation rate.

Beyond optimizing baggage handling efficiency, the solution delivers substantial environmental benefits by eliminating the need to print bag tags for these mishandled bags, resulting in a significant reduction in both CO2 emissions and paper waste.

Automating reflight operations is projected to save the industry up to US$ 30 million annually. Additionally, airlines can optimize resource allocation, improve decision-making, and scale operations flexibly based on demand, even during peak travel periods.

This transformative approach marks a pivotal step towards smarter, more sustainable, and passenger-centric baggage management, setting a new standard for operational excellence in the aviation industry.

LOOKING FURTHER AHEAD

Many other technologies and trends are already on the horizon, and will doubtless have an important impact on airports. Innovations to consider include faster and more powerful networks, robotics, autonomous vehicles, quantum computing and urban air mobility (UAM).

Airports also need to plan for ever-increasing numbers of electric vehicles, both airside and in airport car parks, and will need to consider upgrades to electric charging infrastructure. Looking even further ahead, as aircraft design changes, and when hydrogen becomes a feasible zero-emissions fuel, airports will need to plan for the management of ammonia on a large scale.

6G networks and beyond

Further advances in mobile – and fixed – networking technology will deliver ultra-high-speed, low-latency networks, enabling seamless integration of the physical and digital realms. With sufficient bandwidth, we can envisage holographic telepresence, enabling remote expert assistance and a fully-immersive passenger experience.

Autonomous vehicles

In the first instance, autonomous vehicles will likely be used for airside airport operations to improve efficiency, safety and sustainability. Autonomous airside vehicles could include self-driving tugs, fuel trucks, and even autonomous aircraft pushback systems.

Future applications could include self-driving vehicles being used for baggage handling, passenger transport and even aircraft servicing. This would be likely to depend on AI-driven traffic management systems to optimize vehicle routes and operations.

Robotics

Relatively speaking, robotics are still in their infancy, but it is possible to imagine future robotic applications. This would however presuppose an intelligent, data-driven, living map of the entire airport and its operations. Applications could include:

- Swarm robotics for baggage handling – coordinated robot teams could autonomously manage baggage, all the way from check-in to aircraft loading, as well as unloading and baggage distribution.
- AI-powered customer service robots – humanoid robots with advanced natural language processing could provide personalized assistance throughout the airport.
- Nanorobotics for maintenance – microscopic robots could perform predictive maintenance on aircraft and airport infrastructure, right down to the molecular level.

FINAL THOUGHTS

DIGITAL TRANSFORMATION ISN'T JUST A CATCHPHRASE; IT'S A BUSINESS IMPERATIVE.

To meet rapidly growing passenger demand, and ensure long-term financial stability, airports need to make better use of their existing physical spaces. They can do this by adopting and integrating new technologies, optimizing processes landside, airside, and off-airport, and empowering their staff.

Technology alone isn't enough. Staff training and effective change management are crucial for success. Well-trained personnel can guide passengers, manage exceptions, and help maintain a positive experience. While automation and robotics can help take over many of the more mundane non-customer-facing activities.

Advanced connectivity already enables everything from mobile check-in to self-bag drop to biometric boarding – and it can all be improved by harnessing the power of artificial intelligence.

What's needed next is better collaboration among all the stakeholders—airports, airlines, ground handlers, technology providers, regulatory bodies and more.

And that's why we're here. Across the globe, SITA is making innovation happen. We're exploring future-proof solutions that can be deployed today, and providing a pathway for what's to come.

So come and talk to us.

SITA AT A GLANCE

SITA: YOUR WORLD LEADING PARTNER

Smoother air travel every step of the way.

- We provide services over the world's most extensive communications network. It's the vital asset that keeps the global air transport industry connected.
- Our customers include airlines, airports, ground handlers and governments.
- We work with around 400 air transport industry members and 2,800 customers in over 200 countries and territories. Almost every airline and airport in the world does business with SITA.
- Through information and communications technology, SITA helps to make end-to-end journeys easier for passengers – from pre-travel, check-in and baggage processing, to boarding, border control and inflight connectivity.
- With a customer service team of over 2,000 people around the world, we invest significantly in achieving best-in-class customer service, providing 24/7 integrated local and global support for our services.
- Created and owned 100% by the industry, SITA is the community's dedicated partner for IT and communications, uniquely able to respond to community needs and issues.
- Our annual Air Transport and Passenger IT Insights reports for airlines, airports and passengers are industry-renowned, as is our Baggage IT Insights report.

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