



# SMART INSIGHTS, LASTING IMPACT

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## Capabilities

STRATEGIC INTELLIGENCE      NEW BUSINESS      TRANSFORMATION



# INDICATOR STACK

Decoding the NEXT:  
Agenda-Setting Insights

Our research combines a data-driven approach with unconventional external data sources to uncover unique insights.

By integrating diverse perspectives—from consumer sentiment to funding dynamics—we provide a comprehensive foundation for decision-making.

This external focus enables us to identify trends, measure impact, and connect actionable intelligence to strategic objectives, ensuring decisions are informed by a broad, dynamic understanding of the ecosystem.

## LAGGING INDICATORS

## LEADING INDICATORS

### IMPACT

Making sense of results

### OUTCOME

Making sense of resonance

### OUTPUT

Making sense of action

### INPUT

Making sense of interest

#### CONSUMER SENTIMENT

Reviews  
Social Listening  
NPS & Customer Satisfaction

kimolq

NETBASE  
QUID

#### INDUSTRY NARRATIVE

Media Sentiment  
Earnings Calls  
Trend Reports  
Features & Awards

feedly

NETBASE  
QUID

#### ACTOR DYNAMICS

Founding Dynamics  
Product Launches  
Startup Partnerships  
Personnel Dynamics

feedly

Thinknum

#### FUNDING DYNAMICS

Venture Capital  
CVC  
R&D Expenditure

PitchBook

dealroom.co

#### MARKET DYNAMICS

Stock Performance  
Market Shares  
Sales Data, Growth Rates

statista

#### USER BEHAVIOUR

Search Behaviour  
App DLs & Usage  
Website Visits

Google

data.ai

#### TECHNOLOGY DYNAMICS

Patents  
Wikipedia Edits  
Tech Momentum

PATENTSIGHT

WIKIPEDIA

#### SCIENTIFIC INTEREST

Research Grants & Projects  
Published Papers

feedly

Google Scholar

# LIH's Innovation Theses – The Great Inversion

## ASSETS

### → Transportmittel

#### DIVERSIFIED ASSET COMPETITION

New technologies and asset players diversify supply



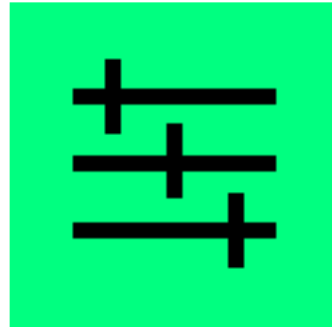
- New modes of air travel are emerging, multi-modal competition is increasing, but travel bans limit supply

## CUSTOMERS

### → Kunden

#### COMMUNITIES DEFINE DEMAND

Travelers have new and unique preferences



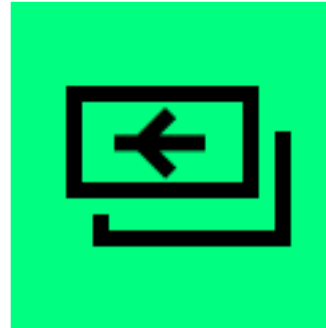
- Fragmented customer groups with unique value-based preferences define the longtail of travel

## CHANNELS

### → Vertriebskanäle

#### EMBEDDED TRAVEL

New channels to sell to and inspire travelers



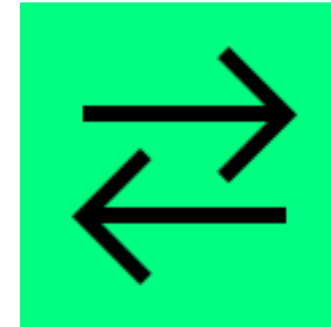
- The creator economy has changed travel inspiration and bookable content enables beginning stages of monetization

## ENGAGEMENT

### → Kundenbindung

#### FROM TRANSACTIONAL TO RELATIONAL

New ways to engage and build loyalty



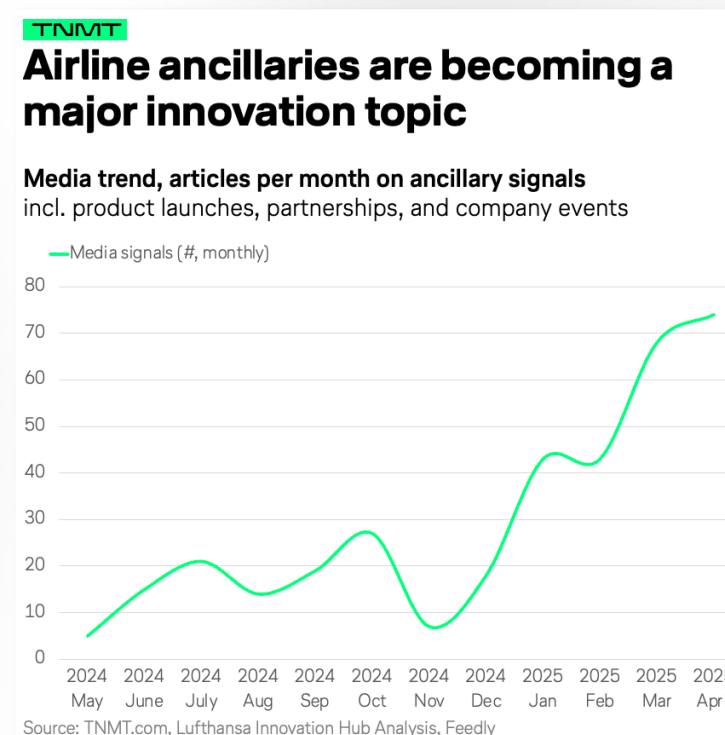
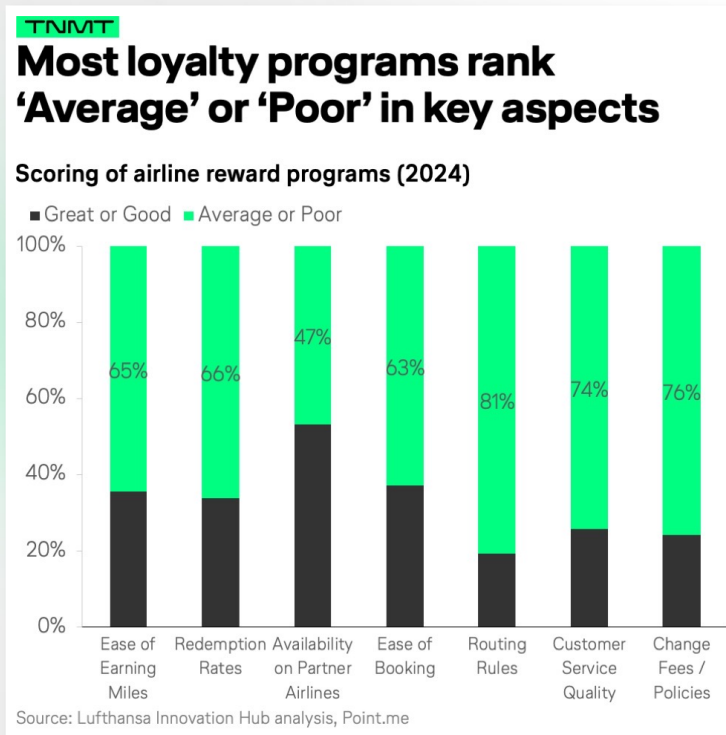
- Fostering long-term and commercially viable customer relationships is becoming more important than ever





## Rethinking Customer Engagement – From Loyalty to Ancillaries

Airlines appear to be struggling to deliver meaningful value through their loyalty offerings, leading to growing frustration among travelers who find these programs falling short of expectations. Social media sentiment analysis confirms this trend, with negative conversations about these programs remaining consistently high. Loyalty programs are major revenue drivers and airlines are now pressured to find new ways of engaging customers in a commercially impactful way. The way forward: **smart ancillary sales.**

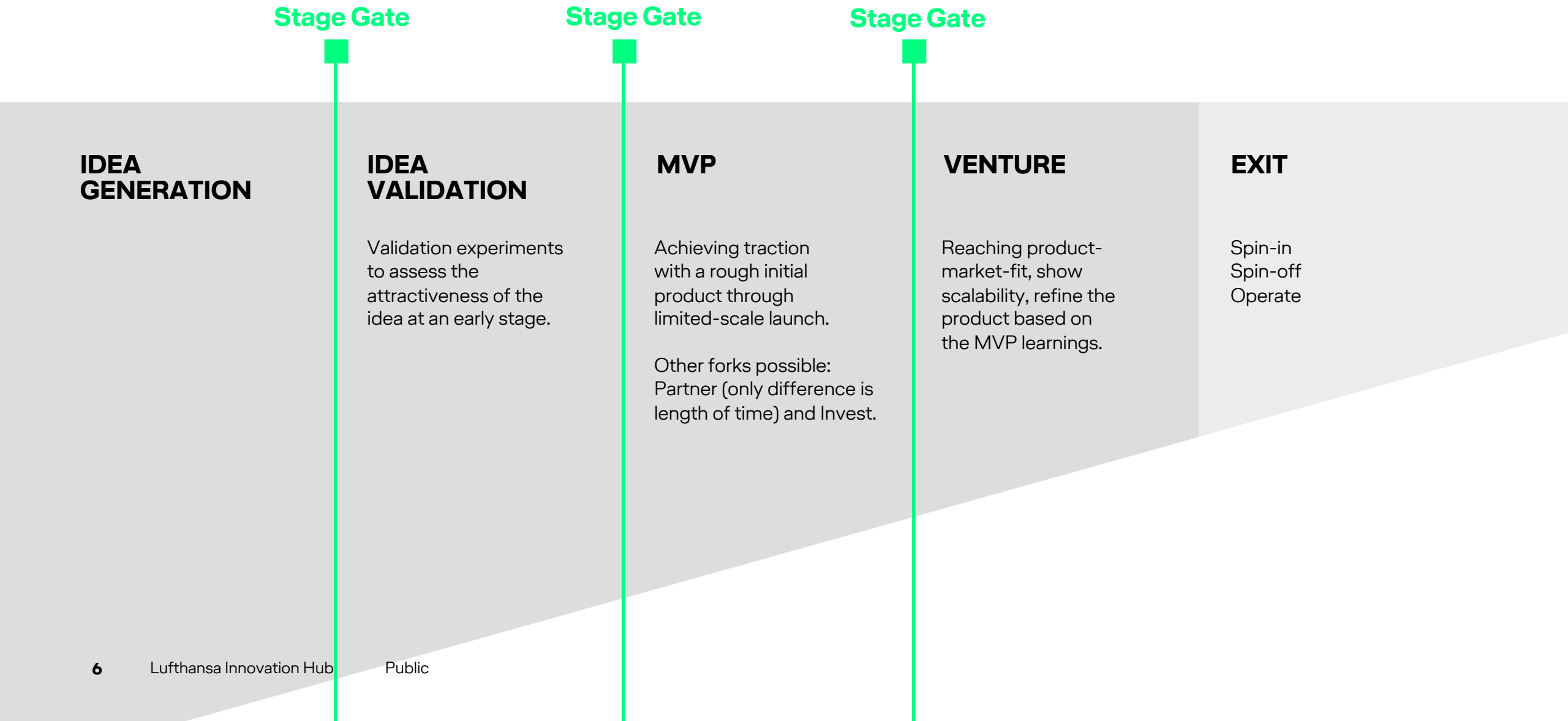


→ **Ancillaries = buchbare Flugnebenleistungen oder Zusatzleistungen wie:**

- Sitzplatz-Upgrades
- Zusätzliches Gepäck
- Extra Mahlzeiten
- WLAN in der Kabine
- Etc.



# Innovation funnel – 5 stage success





# Taking Ancillary Sales To New Destinations

May 2025



# Most indirect customers have no easy way to buy ancillaries

Leading to significant lost revenues for Airlines



*Passengers*

*No easy way to add ancillaries  
between booking and flight  
(partly possible via phone  
hotline)*



*Agents*

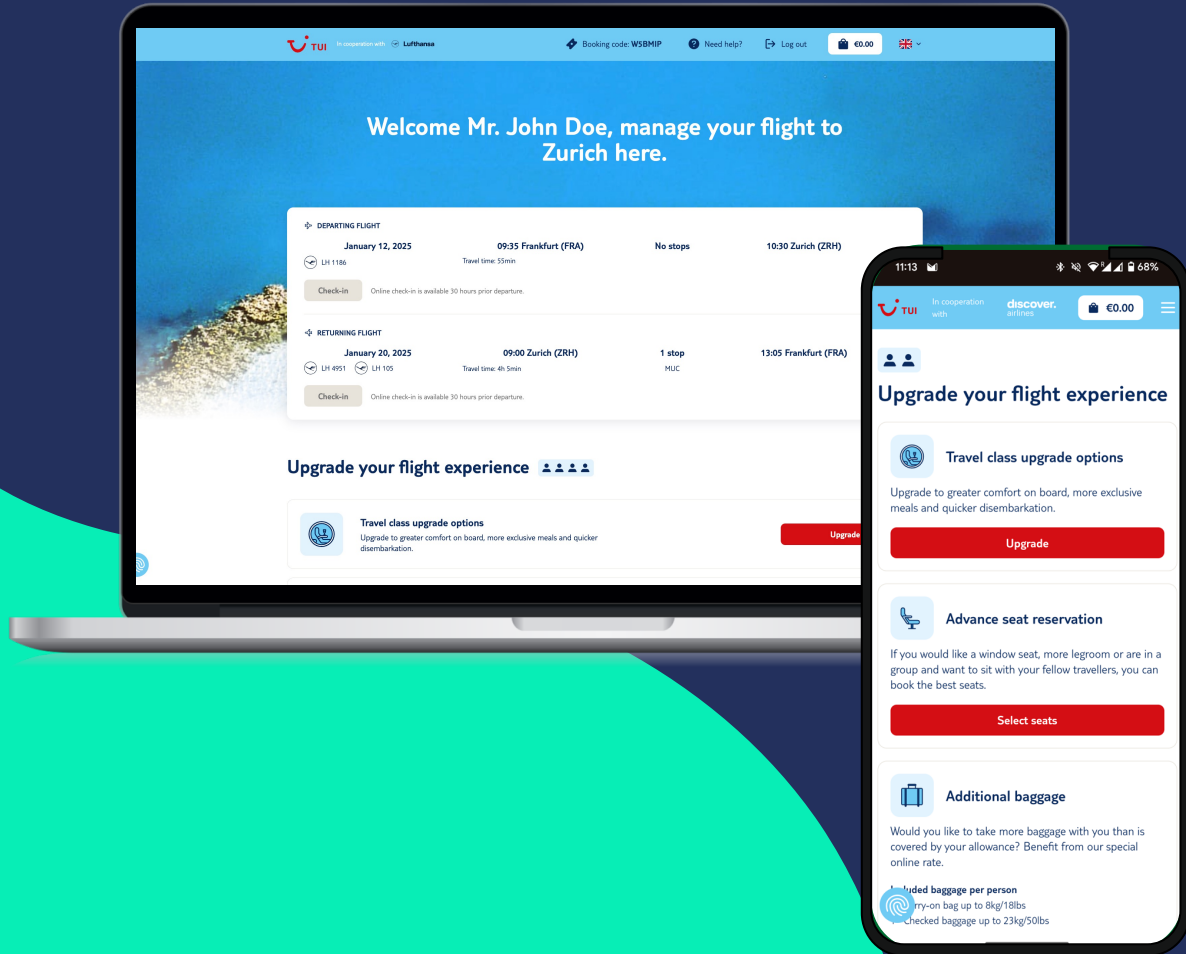
*Most agents do not offer  
ancillaries on their own shelf*



*Airlines*

*Average ancillary take rates via  
indirect channels are  
significantly lower compared to  
direct sales channels*

# Post-booking white label solution



Modifly is a platform that enables travel agency customers to buy ancillary services via self-service and in the agency's branding.



No technical development for Travel Agents needed



Allotments as well as Single seat GDS & NDC bookings



No upfront, marketing, and subsequent maintenance costs for Travel Agents



Direct access to Altea through DCAPI with own office IDs.

# Modifly fills the gap for currently unserved customers

Example of customer journey for TUI

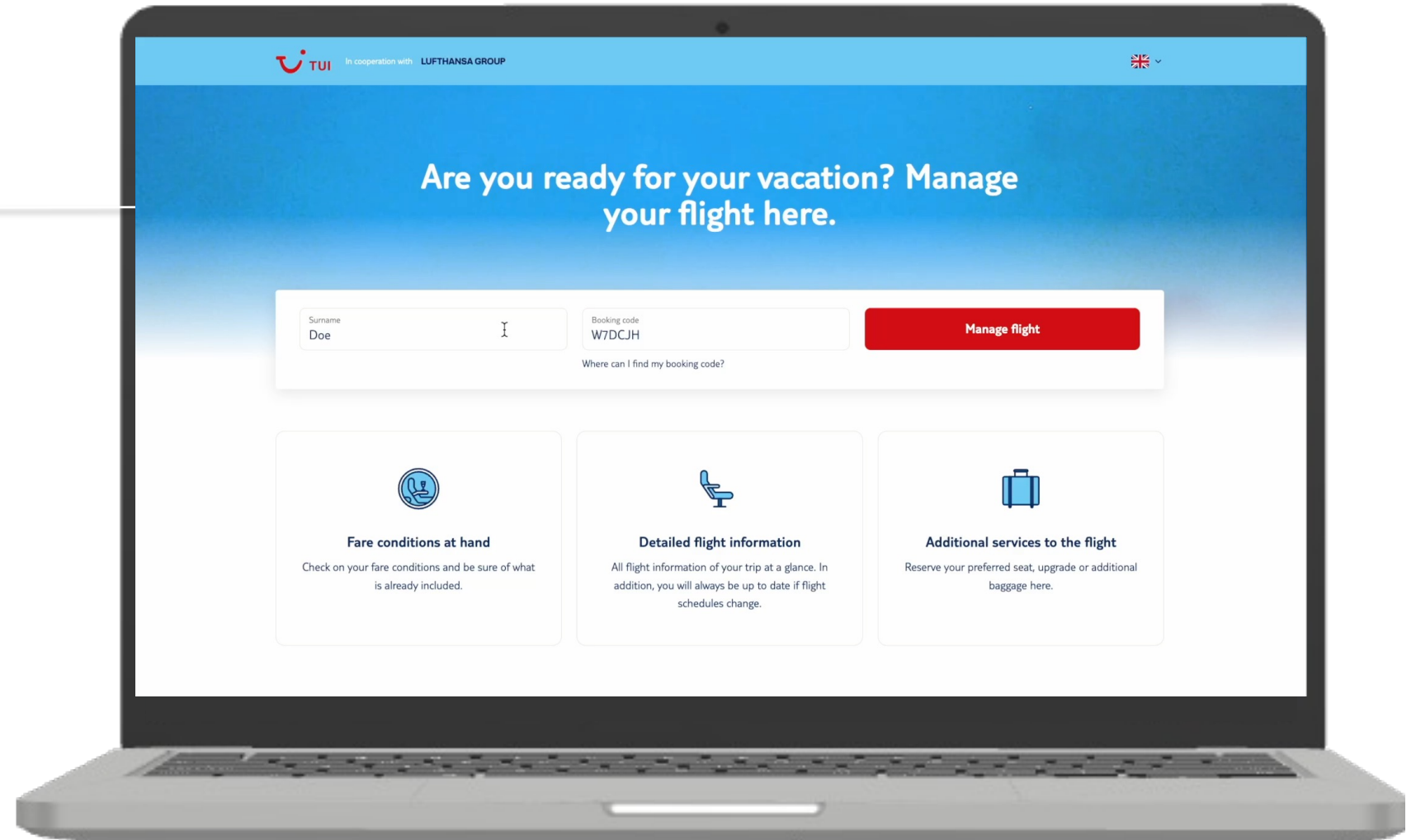


1

Traveler books a travel package via TUI

2

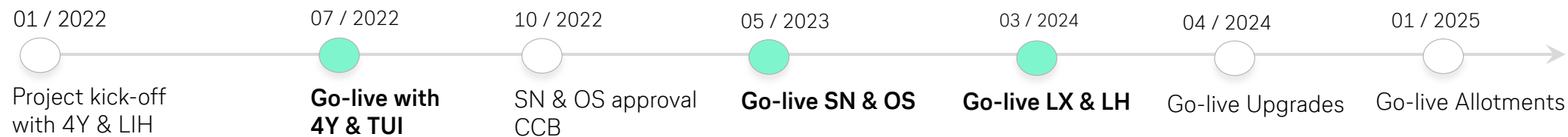
TUI provides deeplink to Modifly post booking



The video can be found [here](#)

# The Growth Journey of Modifly

From a Pilot with 4Y & TUI -> €20M Business by 2025





# The Smartest Way to Sell Ancillaires in 2025

Proven with agents. Now ready for other airlines – at scale, worldwide.



## Agency Partners

## Airlines

## Products Available



accounting for 80% of airline ancillary revenues



Advanced Seat  
reservation



CO2  
compensation



Additional  
Baggage



Check-in



Fixed price  
Upgrade



Lounge  
access



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Lufthansa Innovation Hub  
28. Mai, 2025



-> Anna



-> Clemens