Welcome Address

Stephan Copart
Head Digital Transformation, IATA
Innovation Day 2024

125 Registered Delegates

39 Individual Airlines

63 Airline Delegates

16 Digital Innovation Strategic Partners

9 Accelerate Startups
What are you looking to get out of the Innovation Days?
Geneva, Switzerland
25-26 April 2024

Legal Briefing

Miriam Geiss
Senior Specialist Counsel, IATA
Competition law guidelines

Do not discuss:

• Any element of prices, including fares or service charges
• Commissions
• Allocations of customers or markets
• Marketing plans, commercial terms or any other strategic decision
• Group boycotts
• Your relations with agents, airlines, tech providers, vendors, or any other third parties
• Any other issue aimed at influencing the independent business decisions of competitors
What do Customers Want?

Marion Guerel-Veyrines
Manager Survey Solutions, IATA
Growing satisfaction reaching record levels

% of Satisfied (Very satisfied + Somewhat satisfied)

Source: Global Passenger Survey 2023
“Planning my trip” and “Reaching final destination” touchpoints are key drivers to positive satisfaction.

<table>
<thead>
<tr>
<th>Touchpoint</th>
<th>2022 Satisfied</th>
<th>2022 Dissatisfied</th>
<th>2023 Satisfied</th>
<th>2023 Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Booking</td>
<td>82%</td>
<td>6%</td>
<td>84%</td>
<td>5%</td>
</tr>
<tr>
<td>Search for Travel Opt</td>
<td>5%</td>
<td>6%</td>
<td>9%</td>
<td>11%</td>
</tr>
<tr>
<td>Airport Arrival</td>
<td>5%</td>
<td>6%</td>
<td>83%</td>
<td>9%</td>
</tr>
<tr>
<td>Check-In</td>
<td>6%</td>
<td>6%</td>
<td>82%</td>
<td>9%</td>
</tr>
<tr>
<td>Baggage Drop</td>
<td>73%</td>
<td>9%</td>
<td>75%</td>
<td>9%</td>
</tr>
<tr>
<td>Security</td>
<td>77%</td>
<td>8%</td>
<td>77%</td>
<td>8%</td>
</tr>
<tr>
<td>Boarding</td>
<td>76%</td>
<td>8%</td>
<td>76%</td>
<td>8%</td>
</tr>
<tr>
<td>On-Board</td>
<td>71%</td>
<td>13%</td>
<td>71%</td>
<td>14%</td>
</tr>
<tr>
<td>Transfer</td>
<td>69%</td>
<td>8%</td>
<td>69%</td>
<td>8%</td>
</tr>
<tr>
<td>Border Control / Immigration</td>
<td>68%</td>
<td>4%</td>
<td>68%</td>
<td>4%</td>
</tr>
<tr>
<td>Baggage Collection</td>
<td>83%</td>
<td>5%</td>
<td>83%</td>
<td>4%</td>
</tr>
<tr>
<td>Final Dest Reach</td>
<td></td>
<td></td>
<td>83%</td>
<td></td>
</tr>
</tbody>
</table>

Source: Global Passenger Survey 2023
Base: N (2022)=10'206, N (2023)=8'790
Air travelers’ pain points remains about the airport processes (“Baggage”, “Border Control” and “Security”).

Source: Global Passenger Survey 2023
Base: N (2022)=10'206, N (2023)=8'790
Passengers’ top priorities are:

**CONVENIENCE**

“It would be so easy access all my trip information from one single location”

**SPEED**

“Too much time spent at border control, especially when travelling with kids”
Convenience is the driver for positive Booking...

84% travelers are satisfied with their booking experience

#1 touchpoint with the highest satisfaction levels

Improvement areas:
- Access to information in one single place
- Clarify what is included in the price and what is optional

Interesting Fact:
Leisure Passenger are significantly more satisfied than Business 85% vs 80% Top2Box
... and Payment experiences

3 out 4 travelers are satisfied with the ticket payment experience

73% have preferred paying with credit/debit card

But preferred payment medium vary by region

<table>
<thead>
<tr>
<th>Method of Payment</th>
<th>Global</th>
<th>Africa</th>
<th>Asia Pacific</th>
<th>Europe</th>
<th>LATAM</th>
<th>Middle East</th>
<th>North America</th>
</tr>
</thead>
<tbody>
<tr>
<td>Debit/Credit Card</td>
<td>73%</td>
<td>57%</td>
<td>61%</td>
<td>81%</td>
<td>85%</td>
<td>70%</td>
<td>74%</td>
</tr>
<tr>
<td>Digital Wallet</td>
<td>18%</td>
<td>11%</td>
<td>41%</td>
<td>15%</td>
<td>4%</td>
<td>14%</td>
<td>8%</td>
</tr>
<tr>
<td>Bank Transfer</td>
<td>18%</td>
<td>36%</td>
<td>16%</td>
<td>17%</td>
<td>17%</td>
<td>21%</td>
<td>18%</td>
</tr>
<tr>
<td>Loyalty Points</td>
<td>17%</td>
<td>11%</td>
<td>11%</td>
<td>14%</td>
<td>20%</td>
<td>18%</td>
<td>25%</td>
</tr>
</tbody>
</table>

Ranking of preferred method of payment. Question with multiple choices.
Payment touchpoint is critical to support industry growth

38% of passengers dissatisfied with payment related to a lack of flexibility*

25% passengers did not purchase additional airline product/services because of a payment issue

Improvement areas:
- Make payment easier
- Secure right method payment for key target
- Enable split payment
- Be transparent with fees

*No availability for split payment and preferred payment option
Complex visa requirements deters travelers

36% have been discouraged from traveling due to immigration requirements

49% main deterrent is process complexity
87% are willing to share immigration info before departure to speed up arrival process, up 4% from 2022

2 out 3 prefer online application ahead of travelling for obtaining a visa
Speed is the essence at the Airport

55% passengers would like to be notified about FastTrack options ahead of their trip

2 out 3 believe that queuing times at security checkpoints need to be improved

91% said they would be interested in a trusted travel program to get them through security faster
Increasing usage and confidence in Biometrics

+12pp usage of biometrics at the airport in 2023. It represents 46% of the passengers

75% of passengers want to use biometric data instead of passports and boarding passes

85% score on positive satisfaction for those using biometrics
Data protection is the key enabler for biometrics

40% would reconsider the use of biometrics if they were reassured about its privacy

Top concerns about the use of biometric information
1. Data Breaches
2. Data being shared with other organization
3. Not knowing how long data will be stored
4. Not knowing how data can be deleted
Want to learn more?

Get your copy of

2023 Global Passenger Survey

- PDF Report
- PDF + Excel Combo
- Historical Combo Last 3 years

Table of Contents:

1. Travel satisfaction
2. Booking & Payment
3. Special assistance
4. Facilitating immigration
5. Your baggage
6. Your biometric information
7. At the airport
8. Connection
9. Travel disruption
10. Arrival

www.iata.org/gps

-20% discount with GPS20 promo code
Until May 31st, 2024
Airline Strategies on Customer Expectations

Stephan Copart
Head Digital Transformation, IATA

Kenny Chang
Executive VP CMO, Korean Air

Peter Lienhard
Head of IT, SWISS & Head IT Domain Commercial, LHG

Julio Toro Silva
VP & Chief Information and Technology Officer, Copa Airlines
Modern Airline Retailing – The Tangibles

Yanik Hoyles
Director Distribution, IATA
Modern Airline Retailing

Yanik Hoyles
Director Distribution, IATA
Forces outside the airline industry are shaping customer expectations

Digital and data-native companies

Tech giants

World Class Digital Retailing

One-click shop and order & pay, bundling, one single customer record,
Today, the industry is constrained and limited by the legacy standards, processes & technology in place. But today, our industry is **constrained and limited** by the legacy standards, processes & technology in place.
Modern Airline Retailing

Airlines in control of their Products, Money & Data

Digital Identity | Selling with Offers | Fulfilling with Orders
The “train has left the station”

73 Airlines & 100 Tech providers

Strong acceleration in US & ... and recent announcements in Europe

*Source: the IATA Airline retailing Maturity (ARM) index
And some airlines are already realizing benefits

<table>
<thead>
<tr>
<th>100m+</th>
<th>1.5%</th>
<th>600m+</th>
<th>50m+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual savings in Distribution costs</td>
<td>Increase in revenues from Continuous pricing</td>
<td>Revenue increase by 2027</td>
<td>Annual value creation in payment from 2027</td>
</tr>
</tbody>
</table>
But if they want to become truly customer centric, airlines need a legacy-free framework with Offers & Orders only.
And so, a Consortium is helping to accelerate the journey to modern airline retailing

**Consortium Members**

| AIR CANADA | AIR FRANCE KLM GROUP | AIR INDIA | American Airlines | BRITISH AIRWAYS |
| CATHAY | Emirates | FINNAIR | IBERIA | LATAM |
| LUFTHANSA GROUP | QATAR AIRWAYS | SINGAPORE AIRLINES | TURKISH AIRLINES |

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1. **Business Case V1.0**
   - Modern Airline Retailing - A Business Case V1.0: this document focuses on the next phase of the journey to Modern Airline Retailing, which entails a significant transformation of the IT infrastructure and underlying processes, in order to enable airlines to fully retail their products without constraints.
   - A Business Case (Chinese translation)
   - Business Case and Decision Drivers: Lessons from the Leaders - to be released in Q2 - get notified

2. **Business Reference Architecture**
   - The first version of the Business Reference Architecture was developed by the Airline Retailing Consortium, supported by ATAI's industry architects, with the objective to support the move to a world of 100% Offers and Orders.

3. **Airline Transition**
   - IT Provider Readiness and Airline Transition Pathways: the latest output of the Consortium's work presents the findings of extensive research with 15 IT Providers, assessing their commitment and readiness to roll out a new generation of solutions, as well as timeframes to transition to 100% Offers and Orders.
   - IT Provider Readiness and Airline Transition Pathways (Chinese translation)

4. **Industry Transition**
   - Successful Airline Retailing Requires Industry Partnerships: developed by BCG in collaboration with the Airline Retailing Consortium and IATA, the study capitalizes on inputs from over 20 senior executives across the broader travel ecosystem and outlines the most important action points that the ecosystem players should focus on, as they engage in the journey to Offers and Orders.

5. **Procurement Considerations (RFI framework)**
   - MARK - Retailing Platform Procurement Considerations: serves as a guide for airlines in the procurement process of a modern and modular platform for airline retailing, based on 100% Offers and Orders. It outlines key principles, considerations, and business requirements to be taken into account by airlines when evaluating vendors and their solutions.

6. **Delivering with Orders**
   - To be released in the second half of 2024 - get notified

iata.org/Retailing-Consortium
Let’s hear from some of these airlines
In case you want to learn more...

iata.org/Retailing
Industry Sustainability Commitment

Jenniina Ylonen,
Engagement & Operations Manager,
CO2 Data Solutions, IATA
Supporting airlines to ensure CO2 data consistency

Jenniina Ylönen
CO2 Data Solutions, IATA
Governments, corporates, and the wider public have increasing expectations for the air transport sector to act sustainably and be transparent about the environmental impacts. Leads to a proliferation of differing CO2 emissions calculators and methodologies, lowering consumer trust. Governments are growingly interested in regulating how CO2 emissions are displayed in relation to air travel. Airline industry strongly supports the use of IATA RP1726 as the preferred industry-approved methodology.
Vision

Ensuring consistent and accurate CO₂ data is displayed across the travel value chain

Supporting airlines in calculating CO₂ emissions data for passenger travel
Solution

CO2 Connect

• Connecting airlines with an accurate & trusted CO2 solution required by their customers and aligned with industry standards
Solution

Using airline audited data versus a theoretical model
CO2 data reflect airlines’ real performance
Sensitive performance data is secured
Consistent data displayed across travel industry
Protects over proliferation of CO2 data
Promotes industry-developed methodology
Want to join?
Contact us at co2datasolutions@iata.org
Networking Coffee Break
Industry Innovation

Kat Morse
Senior Manager Innovation & Partnerships, IATA
Innovation@IATA
To ignite innovation through collaboration, driving transformative progress in the aviation industry.
How: Innovation Toolbox
Connect airlines, tech providers, and startups who want to test solutions to solve industry problems

Innovation Sprint methodology to test ideas and concepts quickly

Objective: advance the amount of pilots / POCs in pre and post standard testing

Work together to solve industry problems using new technologies

* Evolution of Think Tank (Pre-2023)
Innovation Sprints @ The Lab

Industry Challenges
- Focus on specific use cases

Collaboration
- Bring together relevant industry partners

Testing
- Determine if the partners can solve the use cases

Output
- Vision, POC, MVP, Pilot, etc. to guide the industry
Members of our Digital Innovation Community have access to a variety of Innovation Webinars, PoCs under the Innovation Lab, Roundtables, Sprints, and Innovation Day events.

<table>
<thead>
<tr>
<th><strong>Innovation Day</strong></th>
<th><strong>Sprints</strong></th>
<th><strong>Roundtables</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Brings together the Digital Innovation Community to discuss the current industry priorities and promote IATA initiatives.</td>
<td>Time-bound, collaborative workshops (under the Lab) where participants work together to solve a specific challenge faced by the industry.</td>
<td>Collaborative brainstorming where the community shares insights, discusses cutting-edge ideas, and foster innovation through knowledge exchange.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>PoCs</strong></th>
<th><strong>Webinars</strong></th>
<th><strong>Tech Watch</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Tests whether a concept can be implemented successfully and that it has the potential to deliver value. Identifies any technical or practical challenges that may need to be addressed.</td>
<td>Provides the innovation ecosystem with essential updates, insights and guidance on the latest digital innovation advancements and trends to tackle industry priorities.</td>
<td>Work with industry leaders to research new technologies that may impact the industry.</td>
</tr>
</tbody>
</table>
Innovation @ IATA

Digital Innovation Ecosystem

Governance

Engagement

Accelerate

Think Tanks

Hackathons

The Lab
Thank You!
Our Startup Gems!

Paula Pardo Esteve
Senior Manager Ideation, Strategy & Partnerships, IATA
Our Startup Gems!

Simon Dempsey
Chief Commercial Officer, Plan3 (Batch 6 - 2023)
The number one reason a passenger decides not to fly an airline again, is down to how they were treated during a disruption.
Plan3

How would you like to continue your journey?

Take next available direct flight
Select a flight that suits you
Includes a complimentary meal voucher
Includes a hotel & taxi if you fly tomorrow

Fly to another destination
Choose from a selection of destinations
Includes a complimentary meal voucher
Includes a hotel & taxi if you fly tomorrow

Fly a different set of dates
Select alternative dates that suit you
Includes an additional £50 airline gift card

Keep moving - Fly partner carrier
May include one or more connections
Includes a £50 digital meal voucher
Includes a hotel & taxi if you fly tomorrow

Refund me
Cash or gift card refund
20% bonus added to gift card refund

What would solve this disruption for you?
Everything connected behind the scenes
Flights, hotel supply, meal vouchers, ground transport, refunds...

Keep moving - Fly partner carrier
- May include one or more connections
- Includes a €30 digital meal voucher
- Includes a hotel & taxi if you fly tomorrow

Automated refunds

PSS and third party sources of inventory

Integrations with digital welfare providers

Direct connection to hotel PMS and discounted BAR rates
The Plan3 workflow
Personalised, context-aware solutions for travelers.

Issues inbox
Disruption issues are flagged at the earliest possible moment, graded by severity.

Option creator tool
Disruption teams can build and publish ‘option packages’, tackling thousands of problems within a few minutes.

Customer comms tool
Options are sent to passengers via a template-driven comms tool, baked into the system.

Personal info page
Passengers receive an alert with options made available to them, self-serving to a seamless onward journey.
Kicking the tires with Plan3
Lightweight Proof of Concept

- Minimal IT resource - use our API or PSS connections
  ➤ Quickly validate the new customer experience

- Typically no cost to airline
  ➤ 12 week trial period, tight scope

- Success? - The low hanging fruit:
  ➤ Speed of response during IROPS
  ➤ Customer satisfaction levels/NPS
  ➤ Reduction in costs
How Airlines Can Provide a Consistent Passenger Experience During IROPs
From Hub to Outstation

Download from plan3.aero

SIMON DEMPSEY
Chief Commercial Officer
simon@plan3.aero
plan3.aero

IATA INNOVATION DAY
Geneva, Switzerland
25-26 April 2024
Our Startup Gems!

Alex Jara
CEO & Founder, Deal Engine (Batch 6 - 2023)
Our Startup Gems!

Albert Van Veen
CEO, Fast ID (Batch 5 - 2023)
Digital ID in Travel

I travel with my own digital ID!

Albert van Veen IATA 25th of April
The Digital IDentity is coming. And the airlines need to get ready to use it.

A self sovereign digital ID is and identity that owned by the passengers and enables them to get fast biometric access to events, services, and locations.

The **new European legislation** (eIDAS, ESSIF) accelerates a fast introduction of the self sovereign digital ID.

With self-sovereign ID, the passenger is back in control of their biometric journey, without needing to enroll or leave their data with multiple suppliers.
The digital ID is created and managed by the passengers on their mobile-phone.

The digital ID has a wallet to store tickets and boarding cards.

The passengers themselves link their boarding card to digital-ID.

The digital ID is linked to biometric smart gates at the airport.

All the airlines need to do is send their passengers an email.

The digital ID of the passenger is used to create a DTC to travel.
OPEN THE WORLD WITH YOUR SMILE

Create and own ID & Data  Add your ticket  And use your face to open all doors

And keep your data on your mobile phone
Use your face as your boarding pass

1. Link Boarding Card to Digital ID
   - One time Action!

2. Travel as VIP with your biometrics

Check-In and Border Control

Security

Boarding

Travel smoothly with your Face
Currently life
Let’s start a Pilot now

Implementation of a pilot is simple, inexpensive & fast
- Join in @ existing FastID airport.
- Jointly approach a new apport of your preference.
- Biometric quick scan for your airlines.
- Use the ID and biometrics within your own app .
- Biometric Loyalty program

Let’s agree on a pilot application today, sign the pilot contract this week and have it running within the next 4 weeks.
Our Startup Gems!

Paula Pardo Esteve
Senior Manager Ideation, Strategy & Partnerships, IATA
Mastering the Startup Implementation Phase

Tom Barber
Head of Data, Virgin Atlantic

Matthew Biboud-Lubeck
GM Europe & UK, Amperity (Batch 1 - 2022)
How to Build a Best-In-Class Data Stack Around Your Cloud Data Warehouse

Tom Barber (he/him)
Head of Data – Virgin Atlantic

Matthew Biboud-Lubeck (he/him)
GM EMEA, Amperity
Better data to **drive better results**

Amperity

The AI-powered Customer Data Platform for Identity and Activation
Customer data fuels the guest experience

But not if its scattered across systems
Across our travel clients

Misunderstood guests account for **more than half of revenue.**

3 misunderstood records are really 1 person

Cassandra W.
1 yr CLV: $4700

**Why this happens?**

- Data silo’s
- Out-of-date identity
- OTA data
- *Non*-loyalty pax
- End of cookies
- Booker vs. traveler
- No common key
A little about me

Brighton, UK
Crawley, UK
No longer counting

2006 Avionics Engineering Apprenticeship
2009 Production Engineer

2011 Management Information Analytics
2014 Business Intelligence Development (and Cabin Crew once a month)

2016 Revenue Management Analytics
2018 Data Product Management
Today Head of Data
Modernising our Data Platform
The catalyst for change

1. Existing ‘Single Customer View’ limited to deterministic matching of profile records from disparate systems

2. Siloed Customer Data making activation and data management more challenging

3. Low trust in data and slow speed to insights around our customer base

Reduced ability to understand our Customer base to innovate our product offering and personalise their experience
Identifying & Validating a Solution

Chose to pilot using sample data with a potential partner to prove:

- Complex **raw files** could be ingested and processed at **speed**
- **Integration** ability with existing and planned tech stack – Databricks, Azure and Adobe
- **User experience** of the tool – is it easy to ask questions of the data and set up activations?
- Security and **Data Protection** – can methods like Role Based Access Control be used to protect data?

**4 days**  **9 mins**  **3 mins**

- Raw Data to ID Graph
- ID Resolution Run
- Enrich C360 Database
The Before

- Operational Use Cases
- Analytical Use Cases
- ‘Other’ Customer View
- ‘Single’ Customer View
- Relational Databases (Cloud & On-Prem)
- Source A
- Source B
- Source C
- Source N
The After

Unified View of Customer

Amperity

Delta Sharing

Securely sharing only required data with Amperity:
- No replication
- Reduced ETL complexity
- Real Time using ACID
- Governed by provider
- Cloud agnostic

Data Lakehouse

databricks

Source Data
As a result

Leadership, Customer Experience and Marketing Team understand

Within 3 months of implementation, we delivered

5 use cases that were previously either:
- Not possible due to deterministic constraint
- Only possible using a custom, hard to repeat/evolve solution

Customer Facing 2
Analytical 3

Positive impact on NPS, revenue and operational efficiency
What’s next?

**Refine**
Reach even more previously unreachable passengers

**Expand**
Integrate data into more operational tools/teams

**Experiment**
Real time journeys, AI-powered marketing
Thank You
Mastering the Startup Implementation Phase

Marc Corbett
Co-Founder & Director, Thrust Carbon (Restart 7 - 2021)
92% of business travel professionals say that sustainability is a priority for their organisation.

65% of GBTA members (travel buyers) agree quantifying emission reduction opportunities is the most challenging aspect of addressing sustainability.

Source: The State of Climate Action in Business Travel, GBTA 2023
We work with climate pioneers
Thrust Carbon client list is growing 3x per year
3x IATA Hackathon Winners
including for climate action, in Frankfurt, 2019

thrust
The Old Approach

Report
Inaccurate | Expensive | Inaccessible
Reduce
Stop traveling
Remove
Offsets

The Thrust Carbon Approach

Report
Pinpoint accuracy
Live data & click of button reports
Tools for managers & travelers
Reduce
Optimise routes
Specific recommendations
Lowest logical emissions
Remove
Align with “purposeful travel”
Purchase SAF & CCSU
Drive to net zero
The Sustainability Intelligence Platform for Travel
Report; are you climate compliant?

air | hotel | rail | car | taxi | rideshare | meetings & events

Reduce; are your 2030 & 2050 goals deliverable?

reduce emissions per head | sophisticated recommendations | policy implementation

Remove; how do you know what to buy and when?

carbon credits | carbon removal | SAF (sustainable aviation fuel)
Thrust Calculator

The first all in one travel emissions calculator, conceived at IATA Frankfurt Hackathon

Overview for 2024 -

**CARBON EMISSIONS**
7,529 tonnes

**SEGMENTS**
27.4 thousand

<table>
<thead>
<tr>
<th>Equivalencies</th>
<th>Offset my emissions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emission of 1 tonne CO₂e</td>
<td>equals one tree</td>
</tr>
<tr>
<td>Emission of 0.5 tonne CO₂e</td>
<td>equals 24 trees</td>
</tr>
<tr>
<td>Emission of 0.1 tonne CO₂e</td>
<td>equals 240 trees</td>
</tr>
<tr>
<td>Emission of 0.05 tonne CO₂e</td>
<td>equals 2400 trees</td>
</tr>
</tbody>
</table>

**Budget**

- **Available Budget:** 88.2%

**Target**

15% reduction in 2024

If you meet your overall target of 33% reduction by 2030, you will prevent 99 thousand tonnes of CO₂e from entering the atmosphere.
A Platform for 360° Intelligence

There’s more to travel emissions than your managed travel program

- **TMC / OBT Feed**: Bring in data from your TMC / OBT so it can be consolidated and harmonised with the rest of your emissions reporting.
- **Expense**: Capture non-compliant bookings, in addition to travel modes not captured by TMC (e.g. Uber, ferry, coach, etc).
- **Manual Import**: Manually import data from other data sources, such as region specific TMCs (e.g. China).
- **Supplier Feed**: For major suppliers, set up direct feeds to capture their increased granularity of data (e.g. Trainline, preferred car suppliers).

**Thrust Calculator**
Sustainability intelligence for travel managers & business leaders

- **Live Reporting**
- **Emissions Projections**
- **Carbon Budgets**
- **Employee Engagement**
- **Vendor Selection**
- **SAF / Offset Modelling**
- **Compliance Reporting**
Launched March 2022
From scope to launch in just nine weeks
93% of business will fail to achieve their goals if they don't at least double the pace of emissions reduction by 2030. (Source; Accenture)
How can airlines win?
Our $7.7 trillion travel industry must reach Net Zero. It is a question of how quickly, and what your role will be in shaping our planet’s future.

Mark Corbett

mark@thrustcarbon.com
+44 (0)754 596 8605
Mastering the Startup Implementation Phase

David Lee
Founder, Globaleur (Batch 3 - 2022)
GLOBALEUR

AI-powered travel recommendation & personalization engine
Globaleur Overview

**Backed by leading VCs ($10M+):**

- **SoftBank** (Tokyo, Japan)
- **BIG BASIN CAPITAL** (Silicon Valley, USA)
- **PRIMER SAZZE** (Silicon Valley, USA)
- **Seax** (Silicon Valley, USA)
- **KNI INVESTMENT PARTNERS LLC** (Seoul, South Korea)
- **하이투자파트너스** (Seoul, South Korea)

**Global operations:**

- San Francisco
- Dubai
- Seoul
- Singapore
- Paris (2025)
AI Personalization Engine
- Full itinerary recommendations
- End-to-end travel personalizations
- Location-based assistance tools

Global Travel Content
- Personalized recommendations
- Automated travel pattern tracking
- Location-based recommendations

Destination Content
- Copyright free destination content
- 200 cities with 125k destinations
- Created & curated by travel experts

Interactive Analytics
- User behavior & preference tracking
- Cohort analysis
- End-to-end end user insights

Enterprise Solutions
- Enterprise grade customizations
- Available for $1M+ contracts
- FSC Airlines, Hotel Chains, OTAs

Travel requires a FULL STACK approach
Global coverage with streamlined content management operations

- Global coverage of 200+ cities.
- End-to-end content creation and management streamlined through an internally built CMS platform.
- Multi-language supported
- Automated API updates for high-efficiency content management and client ops
- 100% IP-related QA for frictionless usage
A plug-and-play structured content for flexible & dynamic delivery
Customer Use Cases

Trusted by industry leaders, Globaleur is redefining how travel enterprises leverage modern technology to provide personalized services to their customers worldwide.
Lufthansa website screenshot showing flight booking options.
The world’s best trust Globaleur

- Lufthansa (PoC active)
- Thai (Commercial)
- [Commercial imminent]
- [Discussion In Progress]
- [Commercial imminent]
- [Commercial imminent]
- [Commercial imminent]
- [Commercial imminent]
Our Value Proposition

Enhance key business KPIs by leveraging Customer Intelligence data
Leveraging Customer Intelligence for generating business value-adds

New capabilities:
- Personalized itineraries
- Targeted promotions & offers
- Automated & AI-driven operations
- Comprehensive customer profiles
- Scalable & efficient operations
- Derivative products & services

New business value-adds:
- Increase in ancillary revenue
- New customer insights gained
- High ROI from low-cost operations

I’m a repeat customer of the airline. I hope they know a bit about my travel preference and provide personalized offers & services!
Leveraging comprehensive user data for enhancing key business metrics

User Insight & Data Analytics

- Globaleur gather data such as:
  - Page views (POI, Area, City, Blog)…
  - Trip views, trip content, trip dates…
  - Trip created, trip dates, destinations, actions
  - Time Spent…
  - Travel interests…
  - Referrals…
  - Bookings...
  - etc.

For known users, necessary data will be saved to enrich this user’s travel profile

Visitors can be known at one point

AI Decision Engine can analyze the user’s travel intentions, user profiles, evaluate the quality scores, which consider both new data and historical data

For unknown visitors, session data will be stored temporarily and cookies can be dropped

Actionable insights shared to our client

Powerful Business Value-Adds

- Present personalized contents/promotions/suitable products for different visitor or user
- Trigger customized campaigns to different users
- Obtain new lead and sales opportunities
- Store data for lead nurturing and further analytics

Leveraging comprehensive user data for enhancing key business metrics
Our competitive advantages

We have all the elements necessary to convert major customers and beat competitors

Easy & Fast Implementation
Globaleur’s core solutions provide seamless implementation with industry-leading technical agility. Regardless of how big or complex a technical environment may be, our plug-and-play modules provide fast & easy, but highly reliable integration.

Industry-leading SLA Standards
Globaleur guarantees 99.9% SLA levels & under 1 day turnaround for technical support tickets. As a result, we currently boast 100% upsell & contract renewal rate among our customers including Fortune 500 firms.

Low Cost, yet Stunning Value
Globaleur offers stunning value by beating in-house development & maintenance expenses on an annual basis. In tandem to such competitively priced solutions, our customers even generate additional revenue through new ancillary channels.
Today, we are leading the digital transformation for travel companies.

Tomorrow, GLOBALEUR will define how people travel.

Join us in defining the tomorrow of travel.

david@globaleur.com

USA HQ: 4500 Great America Pkwy, Santa Clara, CA 95054
Singapore: 16 Raffles Quay #33-07, Hong Leung Building, Singapore 048581
Dubai: 17 Fl, The H Dubai, 1 Sheikh Zayed Road, Dubai, UAE
Seoul: AMC Tower 4 Fl, Bongeunsa-ro 222, Seoul, South Korea
Improved Customer Experience

Patricio Becher
Vice President UX, Accelya
IATA INNOVATION DAY

Enhancing user experience in the industry

accelya
Hello there!

Patricio Becher
Vice President of UX/UA at Accelya

patricio.becher@accelya.com
The industry has changed
A look at the changing landscape
The industry...
...has changed!
It is time to give full control to the airlines
Accelya is making it happen

Accelya Airlines
UX helps innovation
Designing for the airline industry
UX HELPS INNOVATION

Designing for the airline industry

One of the principal foundations of user experience design in travel is fully mapping out the customer journey. The “customer” in this sense may be an airline business user, an airline analyst, an airline IT member, someone working in the back office or a traveller.
UX HELPS INNOVATION

Designing for the airline industry

In every case, the key is to define the entire journey of their user experience throughout each process and across all channels, using actual feedback from the customer to indicate their reactions at each stage.
UX HELPS INNOVATION

Designing for the airline industry

This journey mapping may include visual cues to illustrate the motivations of a user at each touchpoint, and the nature of their user experience (Happy, Stressed, Confused, etc.). By studying this visual layout, the airline can determine where the gaps exist between negative user experience and customer delight.
UX HELPS INNOVATION

Innovation and UX reduces customer frustration
One journey, one experience

We follow a process

Future
Research & Analyze
Listen
Empathize
Conceptualize
Collaborate & Foster relationships
Understand the market and trends

ONE JOURNEY, ONE EXPERIENCE

How do we do it?
A company committed to innovative products and pioneering ideas.
A company who is placing the customer at the centre
A company who likes to know what you think and your feedback
A company shaping the future, innovating every day with the latest technologies.
And with that understanding we create great products and experiences for the airline industry.
Thank you

THE AIRLINE-FIRST SOFTWARE PLATFORM
Improved Customer Experience

Ursula Silling
CEO, Branchspace

Andrew Webster
Director Airline Offer & Order Consulting, Branchspace
Re-inventing the stopover experience - and more

We want to be the most **forward thinking & trusted** technology partner for airlines and other travel companies.

We **break barriers** of legacy technology & thinking.

Jointly with our customers, we create **the best and most innovative ways to plan, book and experience travel.**
For customers today, stopovers are unfamiliar, bothersome, and full of airline jargon.

Hidden, Not easy to find
Time restrictions
Destination restrictions
Introducing Triplake Stop&Stay
Transforming Travellers’ Experiences
Let’s meet Ana and Gabriela

Gabriela the Workationer  
Digital nomad

Ana the Grand-tourist  
76 year old traveller
Gabriela the Workationer
Digital nomad

“Remote work allows me to experience new cultures and places. Flexibility in life and work is vital for me”

- 31 years old
- Grew up in Brazil, now lives all around the world
- Travels solo, works remotely in tech industry
- Looks for next destinations on nomadlist.com and social media
- Travels every few months, stays for a few months
- Happy to squeeze in a stop on the way for additional sightseeing on the way - and lower cost
- Likes to experience local culture and immerse herself in it
Ana, the Grand-tourist
Making a long trip to visit grandchildren

“Planning and the trip itself can be daunting”

- 76 years old
- Lives in Brazil
- Goes to Dublin just to see her son and grandchildren
- Limited budget
- Needs a break and tranquility before final arrival because of her health
- Needs support, has not traveled often on her own
Streamlining the planning experience

Research, plan, and explore every option
Meaningful recommendations
Local advice based on user preferences
Immersion into local culture
Not just a travel app, but a guide to local life
An untapped opportunity

- Personalised & interactive customer engagement
- Increase demand & differentiation
- Engage your local stakeholders
- Meeting customers new travel habits & preferences
- More awareness for your destinations
- More direct bookings, more flight & ancillary revenue
Stop&Stay digital engagement ecosystem

Destination Marketplace App
- Inspiration
- Booking entry point
- Planning trip
- Post-booking engagement

Airline Homepage
- Entry point to Stop&Stay flow

Airline booking flow

Engagement Support

Stop&Stay booking flow
- Booking
- Inspiration entry point
- Catching users in other flow points

Informational mini site
- Inspiration
- Booking entry point
- All info about how it works

Social media promotion
A marketplace to help to retail anything, anywhere, anytime, end-to-end

Sell airline own products (current, new ones)

- Time saving
- Porter Service
- Accessibility
- VIP services
- UAMs
- Priority boarding
- Lounge
- Seats
- Bags
- Pre-order catering
- Upgrades
- Automated check in
- Comfort bundles

Pre-order food (to take on aircraft)

Duty Free

Click & Collect

Self-Transfer

Airport eco-system products & services

- Fast Track
- Spa
- Parking
- Airport tours (virtual, real)

Other Travel Products / Services & anything else

- Virtual tours
- Virtual queues
- Spa
- Products from local stores – delivered at airport or home
- Refund protection
- Baggage protection
- e-bag tags
- e-Sim
- e-Visa
- Museum tickets
- Guided tours
- Virtual tours
- Restaurant bookings

Transport & Mobility Services

- Bicycles
- Rent a Car
- Car rental
- Limousine Service
- Multi-modal services
- Uber Airport
- Motorbike Rental
- Car Sharing
- Time saving
- Duty Free
- Accessibility

Other Travel Products / Services & anything else

- Hotels & Other Accommodation
- Refund protection
- Baggage protection
- Museum tickets
- Guided tours
- Virtual tours
- Restaurant bookings
- Food delivery
- Car Sharing
- Multi-modal services
- Accessibility
- Duty Free
- Hospital support
- Porter Service
- Lounge
- Seats
- Bags
- Pre-order catering
- Upgrades
- Automated check in
- Comfort bundles

- Pre-order food (to take on aircraft)
- Click & Collect
- Self-Transfer
Everything can be a product
Airlines and airports need the Product-Offer-Order capabilities to engage effectively with each other and the wider eco-system.
We work tirelessly to make every touchpoint of the journey impactful

Check our Customer Stories here: https://www.branchspace.com/customer-stories
Networking Lunch
The Crucial Role of Industry Standards in Fostering Innovation

Andrei Grintchenko
Head Industry Architecture and Standards, IATA
Industry Standards and Innovation

Andrei Grintchenko, IATA Head Industry Architecture and Standards
Standards can be important for Innovation

• Can create efficiencies and foster innovation
• Can accelerate and enhance technology adoption
• Ensures compatibility and interoperability
• Provide for shared norms and nomenclature
• Supports simplified template contracts and agreements
What are Industry Standards?

• **Resolutions**
  • Developed by owning group, endorsed by Board and adopted by Conference with **unanimous** support from airlines, **binding** on all members.

• **Recommended Practices (RP)**
  • Developed by owning group, endorsed by Board and adopted by Conference with **two-thirds majority** support from airlines, provides **guidance** to members.

• **Aviation Industry Data Model (AIDM)**
  • Developed and maintained by Architecture and Technologies Strategic Board.
  • Provide a structured representation of data relevant to our industry and covers various aspects, including business processes, entities, relationships, and data attributes. Serves as a canonical data model for development of data exchange technical messages.

• **Data exchange formats and Implementation Guides**
  • Developed by owning group, endorsed by owning Board and Architecture and Technology Strategy Board. Adopted by the Conference, or under delegated authority from the Conference.

• **Specific Manuals or Guides adopted under a Resolution or RP**
  • Developed by owning group, endorsed by owning Board and Architecture and Technology Strategy Board. Adopted by the Conference, or under delegated authority from the Conference.
Modern Airline Retailing Vision

Airlines in control of their products, money & data

Digital Identity
- Customer Identity in Retailing
- Customer Identity in Service Delivery
- Digital Identity of Value Chain Partners

Selling with Offers
- Product and Partnership Management
- Offer and Channel Management
- Payment Management

Fulfilling with Orders
- Order Management
- Order Accounting & Financial Management
- Delivery using Orders
<table>
<thead>
<tr>
<th>Digital Identity</th>
<th>Selling with Offers</th>
<th>Fulfilling with Orders</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Commonly known as “One ID”</strong></td>
<td><strong>Commonly known as “New Distribution Capability (NDC)”</strong></td>
<td><strong>Commonly known as “ONE Order”</strong></td>
</tr>
<tr>
<td>Advance information sharing, a contactless process based on biometric recognition</td>
<td>Introduces the concept of “Offer”</td>
<td>Replaces PNRs, tickets, EMDs</td>
</tr>
<tr>
<td>Work started in 2019 with first guidance materials</td>
<td>Work started in 2012 with the passing of PSC Resolution 787</td>
<td>Work started in 2016 with the passing of PSC Resolution 797</td>
</tr>
<tr>
<td><strong>Recommended Practice 1701p</strong> Digitalization of Admissibility passed in 2021</td>
<td>First schemas &amp; guidance published 2015</td>
<td>First schemas &amp; guidance published 2018</td>
</tr>
<tr>
<td><strong>Recommended Practice 1730</strong> (Product Management)</td>
<td><strong>Recommended Practice 1780s</strong> (SRSIA) to facilitate interlining with Orders</td>
<td><strong>Recommended Practice 1786a</strong> (SwO)</td>
</tr>
</tbody>
</table>

**Reference Business Architecture for Passenger Distribution with Offers and Orders**
Created by the Airlines Consortium and passed as PSC Recommended Practice 1786a

- Simplified Distribution
- Simplified Settlement

- Commonly known as “Settlement with Orders (SwO)”
- Simplified settlement of Orders with Sellers and Retailor and Supplier
- Work started in 2018 and is reflected in PSC Resolution 750a passed in 2020
- First schemas & guidance published 2019
- PACConf Resolution 850 updated in 2023
Exploring Passenger Tribes

Charoula Gkioka
Head of Strategic Industry Collaborations, Amadeus
MEET THE TRAVELERS OF 2033

Introducing Amadeus Traveler Tribes 2033
BACKGROUND

01
Why is Amadeus doing this report?

- The study focuses on understanding the human side of travel. It uses a sophisticated and diverse research approach.
- The travel industry is very dynamic. We are passionate about improving the travel experience for everyone, now and in the future.
- The report also highlights the role that technology can play in making business travel more seamless.

By researching travellers' behaviours, attitudes and preferences, and how technology can improve travel, we can deliver better travel experiences more effectively.
INTRODUCING THE FOUR TRAVELER TRIBES
Who are the Traveler Tribes 2033?

The Traveler Tribes & percentage of travelers within each tribe*

- 25% EXCITED EXPERIENTIALISTS
- 15% TRAVEL TECH-FLUENCERS
- 17% MEMORY MAKERS
- 43% PIONEERING PATHFINDERS

* All data are consolidated global figures
Pioneering Pathfinders
TODAY
Progressive in 2023 but becoming more sensitive

2033: Informed risk taskers in search of sustainable discovery and personal growth

*82% of this Traveler Tribe are between the ages of 23 and 41, and 68% live with their partners and children.*

*Their above-average income lets them live a fast-paced life, always looking for their next big adventure.*

*50% own a VR headset, NFT, or smart speaker (much higher ownership compared to others).*

*They’re open to calculated risk. 43% have invested in stocks and shares with 65% owning cryptocurrency.*

*Pioneering Pathfinders have an emerging sensitive side. They care about the planet. Already in 2023, 42% own an electric car. And they’re more likely than others to volunteer in their local community.*

*Sustainability is 20% more likely to dictate their decisions compared to others.*

*I feel that technology would play a big, positive role. I don’t exactly have the picture of how it will, but I’m positive that it would erase health risk, human error, and make things better for travelers.*

Pioneering Pathfinder

*All comparisons are compared to other Traveler Tribes*
Memory Makers
TODAY

Habitual and happy in 2023

2033: Curating memories of people and places and seeing value in VR

“ I’m not really into technology and gadgets. But I have the essentials, what I need for myself.”

Memory Maker

- 44% of Memory Makers are aged 42 or older.
- They’re less likely to have changed jobs or sought out new vocational skills in the past year* and have low to medium income levels.
- Memory Makers put people first and place less emphasis on the planet and technology. 57% of them say that sustainability doesn’t dictate the decisions they make.
- 40% of Memory Makers are most excited by the prospect of being able to remember trips more vividly in 2033.
- 58% have no positive emotions toward travel in 2033, 56% are concerned about the changes that may happen.
- Despite skepticism about technology, Memory Makers are excited about VR and AR preview tours. 57% of them will use VR tours before purchasing a trip – seeing it as a way to ensure value for money.

*All comparisons are compared to other Traveler Tribes
Excited Experientialists
TODAY

Carefree & experience heavy in 2023

2033: Open minded and exploratory but avid anti-planners

- Excited Experientialists have a “try it and see” approach to life.
- They prefer experiences over materialism – having traveled 38% more than others in the past year.
- Travel provides a release from monotony. They’re instinctive thrill seekers who balk at routine.
- 44% don’t live with children. The absence of commitment allows them to explore the world.
- 45% have a mid- to high-income with jobs that often provide flexible working options.
- Living in the moment is part of who they are. That’s why they’re more likely than other travelers to act on instinct rather than do research before deciding.
- Excited Experientialists don’t have a favored way for travel to develop in 2033. But they are very unlikely to be open to a highly controlled, scheduled and managed experience they must reserve far in advance.

“I know it sounds really cliché, but we’re here once in this life.”

YOLO. Excited Experientialist

*All comparisons are compared to other Traveler Tribes
Travel Tech-fluencers
TODAY
From business travelers in 2023 to the future mindful balancers

2033: New and novel beats tried and tested but torn about tech

- Travel Tech-fluencers are today’s young business travelers. They prefer new things versus the tried and tested.
- 48% are under the age of 32, and three quarters travel for business. They’ve a moderate income but are confident it will increase.
- As avid planners, they crave control. And they aren’t as willing to relinquish that control to technology.
- They’re most likely to use a high street travel agency in 2033 and 68% of them will still use social media reviews.
- Travel Tech-fluencers are prepared to pay more for biofueled flights. However, often this won’t be at a cost to themselves given the higher probability that they’ll be traveling for business.
- Travel Tech-fluencers are excited that AI will make planning travel in 2033 faster and reduce problems.
- But more than any other travelers – they fear the risk of cyber-attacks and are concerned about data security.

“We see a total overhaul of travel in 2033. And technology will aid this.”

Travel Tech-fluencer

*All comparisons are compared to other Traveler Tribes
03

HOW TRAVELERS THINK ABOUT TRAVEL IN THE FUTURE
What excites the Traveler Tribes about travel in the future?

5 things that excite travelers most about trips in 2033*

- **44%** That traveling to trip destinations will be quicker
- **36%** To be able to remember trips in more vivid ways
- **35%** The chance to travel in more environmentally friendly ways
- **34%** That technology could reduce problems during trips
- **34%** Different ways of paying for trips will make trips more affordable

*Percentage listing as one of the top three things which excite them most about trips in 2033, from a list of 9

The technologies which will most interest travelers in 2033

1. Being able to pay for trips by cryptocurrency, in a virtual reality or via facial recognition
2. Using data to create relevant trips
3. Biometric data - to allow you quick access through passport control
4. Apps which have everything I need to plan my travel
5. Virtual reality preview tours
What concerns do the Traveler Tribes have about travel in the future?

5 things that concern travelers most about trips in 2033*

- **44%** Cybersecurity attacks will be more frequent in 2033
- **41%** How safe the data people share will be
- **36%** Travel in 2033 will be unaffordable
- **36%** Political instability will mean it’s not possible to travel to some destinations
- **34%** That my travel trips will be more expensive if I want to be more environmentally conscious

*Percentage listing as one of the top three things which excite them most about trips in 2033, from a list of 9*
A Pathway to Inclusive Design

Linda Ristagno
Assistant Director External Affairs, IATA
Focus on Accessibility
Why it matters…
...to allow everyone to participate fully in society and the economy

- Persons with disabilities find inaccessible and unaffordable transportation 15 times more difficult than for those without disabilities.

- An estimated 1.3 billion people (16% of the world’s population) experience significant disability. This represents 1 in 6 of us.

- This number is expected to increase over time with a growing – and ageing – global population.

Source: World Health Organization
Aging population: More “old” than “young” for the first time in history: Increasing need for assistance

More than one-quarter of Japan’s population is over the age of 65. This will grow to **40%** by mid-century.

In the U.S., the 65+ represents **15%** of the population – a 33% increase over 10 years, vs. a 5% increase in the under-65 population.

By 2050, more than one-quarter of Europeans will be aged 65 and over, with the older population in all but two European countries representing at least **20%** of the total population.

Travel improves my general mood/outlook toward life

- 80%

It doesn't matter whether I'm going to the next town or across the country - I love taking a trip

- 76%

**Sources:** An Aging World, U.S. Census Bureau, 2015; A Profile of Older Americans, 2017, Administration for Community Living, Administration on Aging, U.S. Department of Health and Human Services; Journey to Healthy Aging: Planning for Travel in Retirement December 2013, Transamerica Center for Retirement Studies and Global Coalition on Aging
Disability is an evolving concept and results from the interaction between persons with impairments and attitudinal and environmental barriers that hinders their full and effective participation in society on a equal basis with others.
UN Convention on the Rights of Persons with Disabilities (CRPD)

**Barriers vs example of changes/regulations**

1. Constructional: accessible lavatories / seating allocation
2. Transportation: Onboard wheelchair/ safe transport of mobility aids/ emergency procedures/ boarding and disembarking rules
3. Communication: verbal/ etiquette/ assistance
4. Attitudinal & human interaction: Crew member behavioral training/ security screening/ one-person-one-fare regulation
5. Technological: Online booking platform/ automated border control/ wayfinding solutions/ waiting time/ signage at airport

**Common denominator:** lack of common approach across markets creates confusion to passengers
Inclusive Developments

- Attitudinal Changes
- Technological Developments
- Inclusion and design
Attitudinal Changes
Technological Developments

- WhatsApp
- Twitter
- Facebook
- Instagram
Inclusion and design
Passengers needs ...

- Can we use booking systems?
- Can we see and hear communication screens and announcements?
- Can we use the airport services?
- Can we safely walk up aircraft boarding stairs?
- Can we understand and read safety briefings?
- Do all staff in aviation understand customer service to a person with a disability

The list goes on and on!!
Is the future in universal design?

What is universal design?

• Universal design” means the design of products, environments, programmes and services to be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design.

What it means in terms of compliance to regulation?

• European Disability Act as an example
Industry Standards & Guidance Material
- Better definitions
- Improved messaging Standards & Pre-notification Systems
- Obtaining advanced info from pax with disabilities on the type of service required
- Reviewed guidelines on Service Handling Process
- Accessible seating on aircraft
- In flight facilities available to passengers

Airport Infrastructure & Facilities
- Wayfinding - Disability assistive routes
- Ramp equipment and procedures
- Dedicated areas / lounges
- Airport assistance service
- Accessible elevators/lifts

Training & Awareness
- Training all staff on accessibility
- Disability awareness
- Competency Based Training
- Specialized Training
- Call centre staff training
- Soft skills training for front-line staff

Industry stakeholders want assistance in translating regulatory requirements into implementable frameworks*.

* IATA marketing Assessment 2020
IATA strategy for an accessibility path

- Policy & Regulations
- Standards & Operations
- Outreach to the community
- Make it a part of the brand: we work together
IATA Accessibility Network

Regional Delivery Focal Points

- AsPac
- Americas
- Europe
- MENA
- WAS
- BRU

Global Development

- Accessibility Lead

Global SME Support

- ECON
- Legal
- Comms
- FSDS
- OSS
- Medical Adviser

- Intelligence gathering
- Regional coordination
- Priorities’ delivery
- Policy development
- Global delivery & regional support
- Advocacy coordination
- ACCWG secretariat
Wheelchair Assistance
Higher Satisfaction for Special Assistance Services in 2023, More passengers Seeking Special Assistance

More passengers asked for assistance for themselves or others

80% said that their service expectations were met up 4% since 2022
GPS : Service Assistance Requests
Requesting special assistance likely to be wheelchair assistance

3 in 10 passengers requested a service either for themselves or someone else. The largest increases were recorded in North America (+17pp) and Europe (+12pp).

QUESTION:

IN THE PAST 12 MONTHS, DID YOU REQUEST ANY SERVICE ASSISTANCE FOR YOURSELF OR SOMEONE ELSE AT ANY POINT OF YOUR JOURNEY?

BASE: N (2022)=10,206  N (2023)=8,790
SINGLE ANSWER

THE 2023 RESULTS ARE 3 OR MORE PERCENTAGE POINTS HIGHER/LOWER THAN THE 2022 RESULTS

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187  7 May 2024
Best practices
Safe Transport of Mobility Aids

In coordination with disability community and range of aviation stakeholders.

Examine and develop solutions in these areas:

- Rethink passenger and its mobility aid journey
- Support passengers with information along the travel chain
- Outlines for mobility devices handling training
- Job aids examples at booking, preparation, loading/unloading and securing
Clear identified areas for improvement

Top improvement areas:

- 20% Improve website accessibility for booking and reservations
- 19% Communication on info and services available
One click away

- Joined up approach regulators/industry/community
- Best practice on accessible websites
- Facilitate communication with passengers
- Lists the type of services offered and why it is important to act as soon as the booking process starts.
Any questions?
Innovation Round Table by Branchspace
Networking Coffee Break

See you back at 16:10
Scenarios for Metaverse in Action

Anna Schneider
Senior Research and Intelligence Analyst,
Lufthansa Innovation Hub
SCENARIOS FOR METAVERSE IN AVIATION

Anna Schneider
Senior Research and Intelligence Analyst

2024-04-25
A joint collaboration between aviation experts

The hype around the term “metaverse” may be over but the underlying technologies continue to advance.

Metaverse is the blurring of lines between the physical and virtual realities using:

- Immersive Technology
- Blockchain, Web3, and NFTs

Throughout a series of workshops in 2023, we aimed to understand how metaverse can impact aviation in the next decade (until approx. 2030).

We used a compact scenario approach to frame our thinking.
A quick intro: our methodology

Step 1: Collection of factors
- Regulation
- Consumer adoption
- Funding
- Business relevance
- Metaverse consolidation
- Substitution potential

Step 2: Prioritization
- Consumer adoption
- Metaverse consolidation

Step 3: Framework creation

The Metaverse Scenario Matrix
Two key factors anchor the scenario approach – Consumer Adoption and Metaverse Consolidation

Source: Airbus, Bauhaus Luftfahrt, Lufthansa Innovation Hub, TNMT.com
Scenario 1: Luxury consumer needs dominate metaverse development in aviation

Luxury consumers are the main target group for highly specialized and fragmented metaverse applications.

Key Use Cases

- **SALES**
  - Premium sales experiences

- **IN-FLIGHT**
  - Premium in-flight virtual experiences

- **CONCIERGE**
  - Immersive travel companion

- **LOYALTY**
  - Tokenized premium collectibles and rewards
Scenario 2: Industrial use cases incentivize joint development across the aviation value chain

An industrial alliance between OEMs, suppliers, and airlines creates a shared metaverse infrastructure for the development of industrial use cases.

Key Use Cases

- **Collaborative Engineering**
  - Development using digital twins, virtual models, and generative design

- **Cabin Configuration**
  - Virtual models for cabin design, line-fit, and retrofit

- **Training**
  - Virtual and augmented training scenarios across the aviation value chain

- **B2B Servicing and Ops Management**
  - Workflow modeling and oversight, supply chain traceability using blockchain
Scenario 3: Metaverse access is becoming a mass commodity but platforms remain fragmented

A patchwork of consumer-facing metaverse platforms give rise to an evolving use case landscape relevant to airlines.

**Key Use Cases**

- **Pre-Flight**
  - Travel planning, inspiration and booking supported by virtual experiences

- **In-Flight**
  - Virtual experiences for retail and entertainment, potentially: BYOD

- **Post-Flight**
  - Immersive customer support

- **Loyalty**
  - Tokenized collectibles and rewards
A true metaverse unfolds

The “ideal” outcome is realized by the emergence of a unified metaverse infrastructure accessed by the masses.

Scenario

Key Use Cases

B2C
- Travel planning, inspiration, booking, customer support...

B2B
- Virtual meetings, content assets, experience design...

INDUSTRIAL
- Engineering, design, cabin interior...

OPERATIONS
- Trainings, workflow augmentation, airline and airport ops...

The Metaverse Scenario Matrix

Two key factors anchor the scenario approach – Consumer Adoption and Metaverse Consolidation

Lufthansa Innovation Hub
Nobody knows what the future will look like … BUT…

1. Monitoring progress of metaverse is essential as the uncertainty surrounding it remains high.

2. All scenarios are rooted in reality: they are supported by current events that indicate its development.

3. Metaverse has potential to support a range of use cases, allowing airlines to develop related strategies:
   - PAX: differentiation, target premium travelers, enable a better booking experience
   - Operations: trainings experiences, customer support ops, augmented airport and ground ops
   - Industrial: aircraft engineering and cabin design, collaborative engineering on virtual models and digital twins
Geneva, Switzerland
25-26 April 2024

Open API Ecosystem

Peter Sun
Senior Manager Open Data Ecosystem, IATA
Open API Ecosystem

Peter Sun
Senior Manager Open Data Ecosystem, IATA

Gayathri Sasidhar
Integration Domain Architect, Air France-KLM

Michalis Vitalis
Founder / Mg Director, Most Valuable Paws Ltd

Alex Walling
Chief Strategy Officer, Rapid
End of Day 1
See you tomorrow at 09:00!
The Role of an Airline Alliance

Kat Morse
Senior Manager Innovation & Partnerships, IATA

Andy Lui
Head of Innovation, SkyTeam
Gabriel Marquie
Senior Manager Digital Identity, IATA
An identity framework is based on 3 concepts

**Holders** present a proof of what they claim

**We rely on credentials** to prove what we claim

**Verifiers** request information and a proof
We need to have the same level of trust in digital as we do in the physical world.

There is no physical interaction between the holder (customer) and the verifier (airline staff).
Two tools are necessary for this to work

**Verifiable Credentials**

A form of electronic certificates or attestation that contains cryptographically verifiable claims about a subject.
Can support selective disclosure, i.e. only sharing your name from your passport.

*e.g. digital passport, mobile driving license*

**Digital Identity Wallet**

A software solution enabling a user to manage and control the presentation of the Verifiable Credential they hold.
Can be accessed through a mobile application or a web interface.

*e.g. Microsoft authenticator application, Apple/Google wallet*
Adoption will ramp up quickly

By 2026, over 500 million people will regularly make verifiable claims using a digital identity wallet.

– Gartner

EU Member States will have to provide Digital Identity Wallets to their citizens and resident by the end of 2026.

63% of EU citizens want a secure single digital ID for all online services

- Eurobarometer survey

5 millions Americans have a mobile driving license

- Govtech
European digital identity wallet framework is progressing

- **Regulation approved** by the parliament 29 Feb 2024.

- **Implementing Acts** to be adopted 6 to 12 month after the Regulation.

- Member states will have to provide wallets to their citizens and residents 24 month after the adoption of the Implementing Acts.

- Technical specifications and **open-source implementation** were released in March 2024.

- 4 large scale pilot including 360 entities from 26 member states are testing a range of use cases and the technical specifications till the end of 2025. Including travel and payment.
One ID has matured two use cases
Digital Identity can support many use cases

**Retailing**
- Preferences and travel history during shopping
- Prove a discount entitlement
- Provide an offer tailored for the customer preferences
- Offer any / alternative payment solution
- Manage my order with any partner
- Verify and prove my eligibility to travel ahead of time
- Prove my eligibility to receive a service
- Travel without the need to show any document (contactless travel)

**Delivery**
- Handle disruption and refund
From scanned paper to digitalization
Digital Identity is structured as one pillar of Modern Airline Retailing.

Airlines in control of their products, money & data

Digital Identity
- Customer Identity in Retailing
- Customer Identity in Service Delivery
- Digital Identity of Value Chain Partners

Selling with Offers
- Product and Partnership Management
- Offer and Channel Management
- Payment Management

Fulfilling with Orders
- Order Management
- Order Accounting & Financial Management
- Delivery using Orders

Industry Activities
- Standards Development
- Transition / Acceleration
- Industry Products & Utilities
- Communication & Advocacy
Get first mover advantage on a business framework that will be widely adopted

**Pilot and roll out mature concepts**
- Digital Identity in distribution (B2B)
- OneID
- Contactless Travel
- Digitalization of admissibility to travel

**PoC for emerging concepts**
- End to End digital ID PoC covering
  - Retailing
  - Service delivery
  - Value chain partner

**Standard setting**
- Business standards
  - Distribution
- Customer experience
- Technical standards
  - Credential exchange
  - Credential verification
Digital Identity to Enable Customer Centricity

William Warbington
Director Innovation Strategy Planning, SkyTeam

Ursula Silling
CEO, Branchspace

Vikas Bhola
Co-Founder & CEO, NeoKe

Vladimir Vujovic
Senior Digital Innovation Manager, SICPA

Kat Morse
Senior Manager Innovation & Partnerships, IATA

Louise Cole
Head Customer Experience and Facilitation, IATA
A Path to Seamless Travel for the Industry

Alan Murray Hayden
Director Airlines, Airports and Security, IATA
Automating Passenger Travel Experience
Growing Pains
Passenger numbers 2x within 10 years

World pax demand by scenario, mns

Source: Oxford Economics/IATA - Air Passenger Forecasts
The challenge

How to double the volume of passengers passing through existing airport infrastructure while delivering a superior passenger experience

Airport Bottlenecks - Physical Touch Points
1. Identification check
2. Doc Check: Immigration airline & border control
3. Airport/Airline access touch points, eg boarding
Solution

1. Move passenger identification and immigration verification checks off airport by incorporating them into the pre-travel experience.

2. Process passengers at airport touch points using biometric enabled Contactless Travel solutions.
What does this look like for passengers?

1. Create Digital Passport/ID
   - 1. Take a selfie
   - 2. Scan your passport/ID
   - or
   - 1. Take a selfie
   - 2. Scan your passport/ID
   - 3. Send to phone
   - or
   - Government Digital ID

2. Ready to Fly/OK to Travel
   - 1. Book a flight
   - 2. You meet regulations
   - ✓ OK to Travel
   - or
   - Visa or Residence Permit, DTA required
   - Take a photo
   - ✓ OK to Travel

3. Contactless Travel
   Enjoy Contactless Travel at XXX by sharing:
   - Boarding Pass/
   - Journey details
   - Passport Details
   - Name
   - Biometric Photo
   - Etc
   - Share
   - No Thanks

Confidential 2023 IATA
IATA and Industry Solutions

Proposed IATA API Solutions

1. Digital ID Creation
   - Passport/ID Scan
   - Digital ID

2. Timatic AutoCheck
   - Itinerary & ID Data
   - OK/Not to Travel

3. Document Scanning
   - Visa / Permit / DTA
   - Visa/Residence Document Picture
   - Visa/Residence Document Verification & Data

4. Contactless Travel Registry
   - Itinerary
   - Contactless Travel Partner Identification & Details

5. Airport & Border Control Data Exchange

6. Airport & Border Control Contactless Travel

Industry Contactless Travel Solutions
Contactless Travel Registry – One ID Standards

Data Sharing Business Logic

No PII Data

Inputs
- Itinerary
- Nationality
- Age
- Document held
- Document – Security level

Outputs
- Identify CT on passenger’s itinerary
- Data required by CT provider
- Timing – when data is to be shared
- Decentralized Comm Address
- CT Provider Data Use Policy link
- Instructions for passenger

Passenger Driven Data Sharing

Airlines
- Passenger Details
- Timatic - OK to Travel
- Biometric Photo

Airports
- Passport Details
- Itinerary Details
- Biometric Photo

Borders
- Passport Details
- Boarding Pass
- Biometric Photo
Contactless Travel

Challenge:
Develop Solutions for Airlines

Alan Murray Hayden
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Digital Identity Implementation

Mike Santos Luparelli Mathieu
Product Innovation Director, Facephi
IATA Innovation day

Miguel Santos Luparelli Mathieu
Product Innovation Director

2024
Secure
Fast
Seamless

Full digital identity solutions driven by AI and ML based on multibiometric platform
Facephi in numbers

We are the company with the most financial institutions in the world

- +300M End-users
- +300 Tech team
- +300 Customers
- +12 Years of R&D
- 99% Proprietary tech
- +230 Dedicated FTEs

Innovation day 2024
Towards the comprehensive management of digital identity

Innovation day 2024

Authentication
- Fingerprint
- Facial
- Voice
- Behaviour

Wallet
- Interoperable
- Hybrid
- User-centered
- Wallet functionality

Reusable Digital Identity
IDV Digital Identity
- Passive liveness
- Blacklist validation
- Governmental Databases
- Video onboarding

OCR Scanning
- Document validation
- Video recording
- NFC Verification

Operations
- Security
- Anti-fraud

AI
Design Studio
- Behaviour
- User-centered
- Wallet functionality

Identity Fabric
UX | UI

Innovation day 2024
We are the leading company with **the most financial institutions worldwide**

while expanding into **new sectors**

Innovation day 2024
Redefining the airport passenger experience

Case study: Aena

The driving forces

- **Streamlining operations**
  Reduces waiting times at security checkpoints and enhancing efficiency through the boarding processes

- **Airport and passengers’ security**
  Contactless travel experience. Mitigating potential security breaches

- **Passenger experience**
  Increasing overall satisfaction and convenience

- **Compliance**
  Ensures regulatory compliance (GDPR) adhering to regulations and standards

Innovation day 2024
Redefining the airport passenger experience

Case study: Aena

Solutions

Onboarding

Step 1
Automatically capturing the traveller’s ID document

Step 2
Selfie for facial verification

Step 3
Biometric comparison with the image on the ID card

Authentication

Step 1
Biometric capture with passive liveness

Step 2
Comparison selfie against onboarding selfie (1:1) or against database (1:N)

Innovation day 2024
Enhancing the digital identity experience

Roadmap to Interoperability

- IDV Digital Identity
- Reusable Digital Identity
- Wallet functionality
- Identity Platform [Fabric]
Networking Coffee Break
See you back at 11:30
Embracing Innovation – How is the industry doing?

Paula Pardo Esteve
Senior Manager Ideation, Strategy and Partnerships, IATA
End of Day 2

Thank you for joining us.