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Transforming Airline Retail

IATA

A New Era of Airline Retail Post-COVID in China

后疫情时期航空公司的数字营销新起点

Datalex & IATA Webinar



Digital Merchandising Trends and The Future of the Digital Airline
数字化营销趋势和航空公司数字化的未来

Trend Description 趋势描述

Digital Servicing & Shift to 'Digical'
数字化服务

- Digital customer service interactions will increase by 40%
- 客户通过数字化服务互动将增加40%
- A Future of Unattended Touchless Travel
- 无人值守的非接触式旅行的未来

Digital Bothism
数字化双重主义

- Sustainability AND performance
- 可持续性和绩效 Data Dichotomy
- 数据二分法
- Appeal of global brand AND '*personal touch*' of local brand
- 全球品牌的吸引力和和本土品牌的"个人风格"

Beyond the Seat & the Long Tail of Travel
超越客座收入和长航线旅行

- New Digital Touchpoints across the 'Long Tail' of Travel for vast opportunity beyond 'traditional' ancillaries
- 超越"长航线"旅行的新数字化接触点，提供超越"传统"辅营收入的巨大机会

Dual Dynamic Strategy
双重动态策略

- Dynamic Pricing applied across the travel lifecycle
- 动态定价应用于整个旅行周期
- Limitless pricing scenarios informed by Data
- 基于数据的无限定价场景
- AI / Machine Learning

Data-Driven Experience Economy
数据驱动的体验式经济效益

- 85% of travellers are willing to pay more for a better experience
- 85% 的旅客愿意为更好的体验支付更多费用
- 72% of consumers expect companies to understand their unique needs
- 72% 的消费者希望航司了解他们的独特需求

The Digital Airline

Airline Opportunity 航司新机会

- Merchandising opportunities **during Order Servicing flow**
- **订单服务流程中的营销机会**
- **Dual Self-Service** – for the Airline and Traveller
- 双向自助服务，适用于航司和旅客
- **Digital Servicing at every touchpoint** – IoT
- 每个接触点的数字化服务 - 物联网

- Use Merchandising to **'sell' green credentials**
- 使用商品营销"销售"绿色凭证
- **Smarter AI Driven** interactions
- AI驱动的更智能的互动 **Embrace Gen Z** Expectations
- 拥抱新一代旅客的期待

- Prolonged Merchandising **Window of Opportunity**
- **延长的营销机会窗口**
- **Subscription Economy** accentuates ancillary opportunity
- 订阅经济强调辅营机会

- Apply real-time and data-driven **Dynamic Pricing beyond initial booking** to the full merchandising flow
- 把实时的，数据驱动的动态定价从最初预定阶段扩展到营销整个过程
- **Dynamic Discounting**
- **动态折扣**

- Shift to **'Experience Provider'** mentality to meet 'Liquid Expectations'
- 向"经验提供者"转变满足"流动的期望"
- **AI/ML** driven personalisation to increase conversion
- AI/ML驱动的个性化以增加转化率
- Social Commerce社交服务

Reassurance Retailing Merchandising what Matters

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Targeted ancillary products that can win back customer confidence

具有针对性的辅营产品可以赢回客户信心

Focus on safety and reassurance Free middle seat, Duo Seats, Priority Boarding, Integration of Digital Health Passport

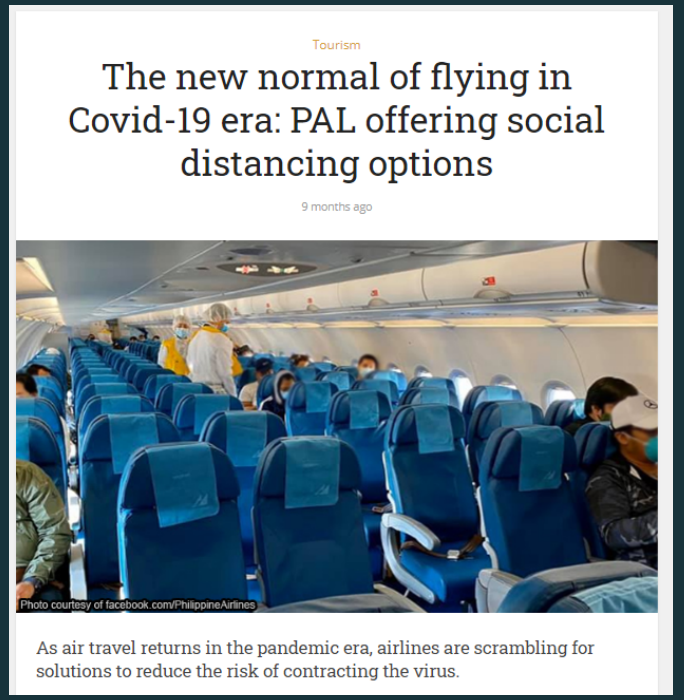
专注安全和放心的旅程，比如：提供免费的中间座位，双人座位，优先等级和整合数字健康护照

Empower customers with a touchless experience

为客户提供非接触式体验

Added-Value Ancillaries versus Volume

增值辅营产品与数量



4 in 5 travellers say that technology will increase their confidence to travel in the next 12 months
五分之四的旅客表示，新科技将增加他们在未来 12 个月内旅行的信心
Source: Censusiwde 2020

Unlock Revenue Beyond the Seat
解锁航空客座以外的收入

Shift to a prolonged window of merchandising opportunity 转向更长的营销机会



CONNECT ENGAGE MONETISE

Effective Merchandising Requires Real-Time Retail Control
有效的营销需要实时的零售控制

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To Excel in Digital Merchandising
在数字营销中脱颖而出

- ✓ Real-time Retail Control for Real-Time Customer Engagement 实时与旅客互动的实时控制
- ✓ Agility and Flexibility 敏捷性和灵活性
- ✓ Great Offer Control to make Smart Digital Decisions 出色的报价控制以做出明智的数字决策
- ✓ Greater Self-Service Capabilities across all channels and touchpoints 跨所有渠道和接触点的更强大的自助服务能力
- ✓ Experiment with Fast time to Market, Try out new products, placement and pricing quickly 尝试产品快速推向市场，并进行布局和定价

84% of airlines say their digital platforms are either not flexible or that it takes time and effort to implement new products and processes.

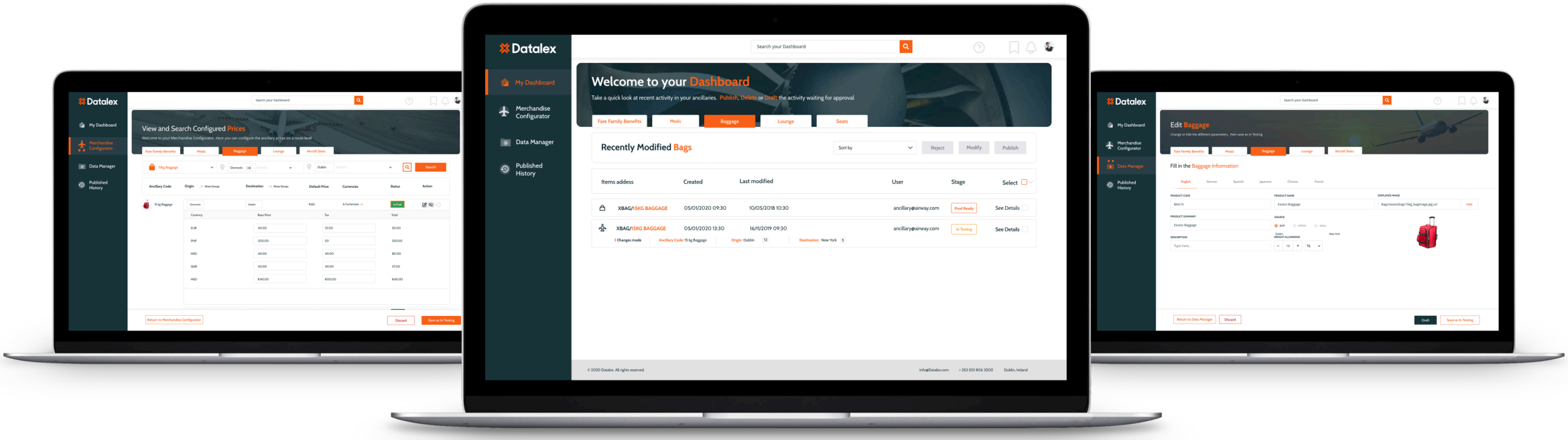
84% 的航空公司表示他们的数字化平台要么不灵活，要么需要时间和精力来实施新的产品和流程。

Source: Diggintravel 2019 Airline Digital Retail Survey

Empowering Business Users with Real-Time Retail Control 为业务用户提供实时零售控制

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The Digital Configurator is an intuitive and sophisticated cloud-based configuration tool for airline business users to configure products and services in real-time
Digital Configurator 是一种直观且复杂的可实现云部署的配置工具，供航空公司业务用户实时配置产品和服务



With a core focus on simplicity, self service and speed, it gives control to an airline's business and marketing teams to bring their business changes to production without involving IT, thus realising significant savings in time and cost.
它以简易、自助服务和快速为核心，让航空公司的业务和营销团队能够在没有 IT支持 的情况下将业务变更需求转化到生产，从而节省大量时间和成本。

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Fully ATPCO Compliant Datalex Pricing Engine
完全符合 ATPCO 标准的 Datalex 定价引擎

Independent fully ATPCO compliant pricing engine. Mature, proven technology.
独立的完全符合 ATPCO 标准的定价引擎。 验证过的成熟技术。



Interlining & Code Sharing
联运和代码共享

One stop shop for pricing of your alliance, interlining and code share partners.
为您的联盟、联运和代码共享合作伙伴定价的一站式服务。



Tactical Promotions and Dynamic Price Adjustments
促销和动态价格调整

Flexible promotions and DPA capabilities across any channel, without IT dependency
Greater conversion & increased revenue
跨多渠道的灵活促销和 DPA 功能，无需 依赖IT， 更高的转化率和更多的收入



Fare Families & Bundles
品牌运价和打包

Dynamic and flexible Fare Family capabilities.
Create relevant fare bundles.
Upsell, increase revenue
动态灵活的票价系列功能。
创建相关的票价组合。 增加销售和收入

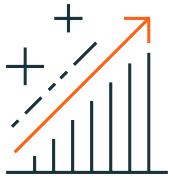
International Shopping & Pricing

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Fully ATPCO Optional Services Compliant
完全符合 ATPCO 标准的可选服务

Independent fully ATPCO Optional Services compliant.
独立的完全符合ATPCO标准的可选服务



Augment with DLX Business Logic
使用 DLX 业务逻辑进行扩充

Augment ATPCO filing with sophisticated business logic
使用复杂的业务逻辑扩充 ATPCO 归档



Combine with 3rd Party Products and DLX Product Catalog
结合第 3 方产品和 DLX 产品目录

Combine ATPCO Optional Services products with 3rd Part products (Car, Hotel, etc.) and DLX Product Catalog将 ATPCO 可选服务产品与第 3 三方产品（汽车、酒店等）和 DLX 产品目录相结合

ATPCO Merchandising ATPCO 营销



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Offer Optimisation through Persona 通过用户画像优化Offer	Contextualisation 情景化	(Micro) Segmentation (微) 旅客分群	Personalisation 个性化
Use Persona to dynamically optimize your offers. More relevant offers for higher conversion and increased revenue 使用 用户画像动态优化Offer。 更多相关Offer可提高转化率和增加收入	Contextualise the request to optimize the offer and return more relevant offers 基于上下文情景优化Offer并返回更多相关Offer	Use our segmentation capabilities to optimize offers and pricing for your market segments 通过我们的分群功能为您的细旅客分群优化Offer & Pricing	Integrate with your CRM and analytics systems for true personalisation 可以与您的 CRM 和分析系统集成以实现真正的个性化

Persona用户画像

航空零售化进展

2021.06.09



McKinsey航空零售化2030预期

高达

$400亿

额外收入



高达

4%

收入增长



高达

$7

单位旅客增长

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零售项目的业务范围

营销系统





收益管理系统



财务系统
离港系统
交付系统



财务系统



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未来联运

计划 → 采购 → 预订 → 交付 → 结算

参考数据

产品目录标准

标准和联运多边协议

IATA DOC

Offer 和 Order 管理
数据通讯标准

结算系统

SwO标准

IATA Settlement with Orders



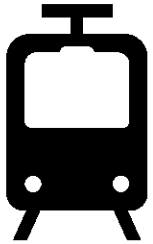
无缝的
旅客体验



实时数据
完全掌控



集成的
附加产品/服务



新的合作伙伴

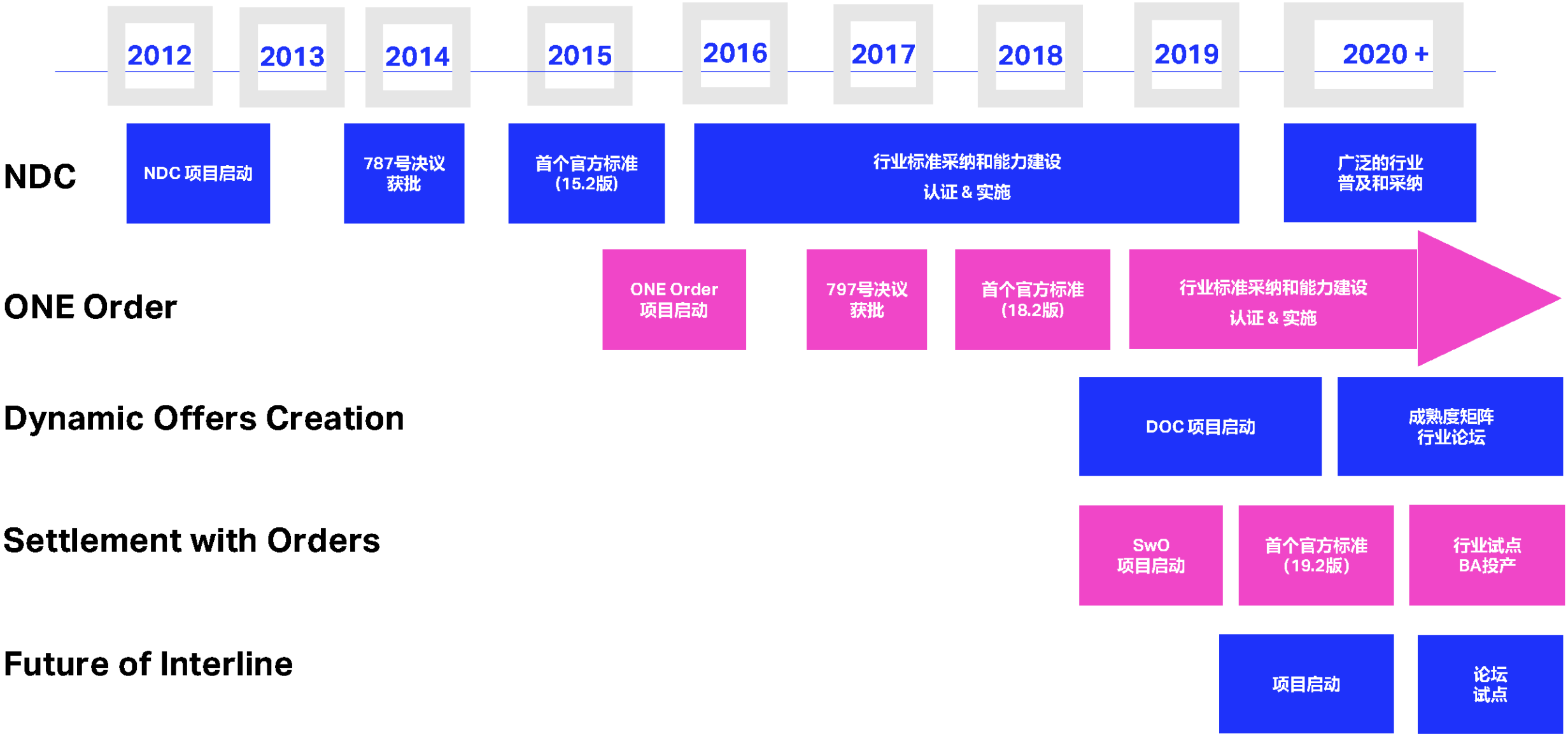


新型的灵活
框架协议

IATA

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零售化项目发展历程



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NDC 引领梯队

23 Airlines

致力于:
2020年末实现20%的直连或分销销售转化到NDC接口上

2020年7月已经实现目标，达到 20.97%



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全球持有NDC认证的航司



航司: 61

NDC@Scale 航司: 17

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NDC 厂商, 聚合商和代理



系统供应商: 87

代理: 29

ATPCO / SITA
BCD Travel
Clarity Travel Technology Solutions
Expedia Group
Farelogix An Accelya Group Company
FARENEXUS GROUP INC
ITA Software by Google
KAYAK Software, Co
Kiu System Solutions
LinksRez
Navitaire
Sabre GLBL Inc
SAP
Shree Partners LLC.
Thomalex
TripActions
Tripadvisor, LLC
Unisys Corporation
WTMC

"Sirena-Travel" JSC
2e Systems GmbH
Air Black Box
AirGateway GmbH
Amadeus IT Group S.A.
APG
Atriis Technologies Limited
Cirravia
Click Travel
Clyde Travel Management
Datalex
DRCT
Duffel
Easylinkz LTD
Flight Centre Travel Group
Hitit Computer Services
Hogg Robinson Group
IBS Software Private Limited
INDRA
ISO Software Systeme GmbH

JR Technologies
KIVORK SRL
Logitravel Group
On Travel Solutions Limited
OpenJaw Technologies
Paxport
Peakwork AG
pribas airline solutions GmbH
PROS, Inc.
RAMAX INTERNATIONAL
Trailfinders Ltd
Travel Planet
Travel Technology Interactive
Travelfusion Ltd
TravelgateX
Travelport
Websky Tech
WINGLET
WorldTicket
Ypsilon.Net AG

AirSky Information
Beijing Daran Aviation Service
Beijing Symbiosys Information Technology
BEIJING UNIFIFI TECHNOLOGY
China Air Service
CHONGQING YUNSHANG AVIATION TICKETING
Chongqing Zhouyou Technology
East China Cares System
FLIGHTROUTES24 TRAVEL
Guangzhou Travelsky Technology
NDCHUB
Sabre Travel Network Taiwan
SHENZHEN HUOLI TRAVEL AGENCY
Shenzhen Tehang Air Services
Sichuan Airailways International Travel
Skywide Network Technology
Tencent Cloud Computing(Beijing)
TravelLink Technology
TravelNDC Technology
Travelsky
Trip.com Group
Wintelia Technology
Wuhan Vetech Technology Development

(Zeeyarah) Superior Tracks Travel & Tourism LLC
Al Woujdan Travel & Tourism
Flyazmeel (Azmeel International Agency For Travel & Tours)
Maureva Ltd
NDCMarketplace.com
Pravasi Travel
Theta Technologies
TPConnects
Trans-End Technologies Pty Ltd.
TRAVVISE LIMITED

Airlines Technology
Alpha Red Services Sdn Bhd
Birdres Technologies
Calculus Systems.
Corporate Travel Management
Craft Co., Ltd
INFINITI SOFTWARE SOLUTIONS
INTERPARK
Jebsen Travel Limited

Mystifly Global Consolidation and Technology
Nihon Unisys, Ltd.
NuFlights
Polarium Inc.
Serko Limited
VERTEIL TECHNOLOGIES
WinSystem Inc.

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中国地区技术能力视图

聚合商 9

中国航信
华东凯亚
广州航信
深圳航路信息
香港朗臻信息
TravelFusion
NDCHub
蜜蜂商旅
TravelNDC

NDC 解决方案供应商 12

中国航信
天扬网络科技
重庆周游科技
腾讯云计算
北京 Symbiosys
香港朗臻信息
OpenJaw
Datalex
北京恒赢智航
华东凯亚
Sabre 台湾
武汉胜意科技

ONE Order (OMS) 供应商 5

中国航信
阿里云
北京 Symbiosys
HPE 中国
北京恒赢智航

代理人 7

北京由你飞飞
中国航空服务有限公司
重庆云上
四川铁航
航班管家
携程集团
深圳特航航空

第三方财务服务商 1

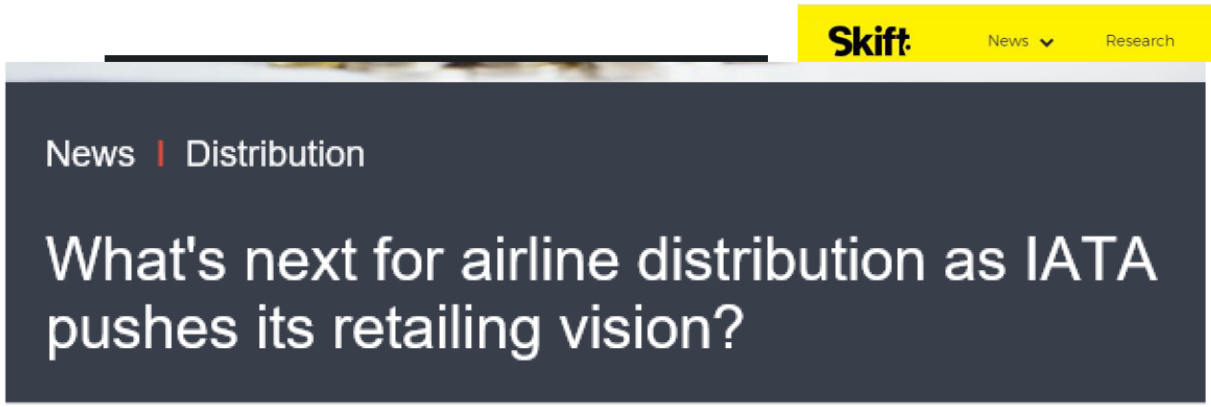
中国航空结算有限责任公司

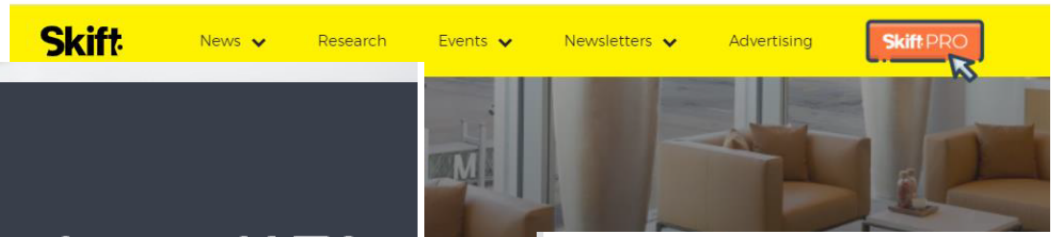
第三方交付供应商 1

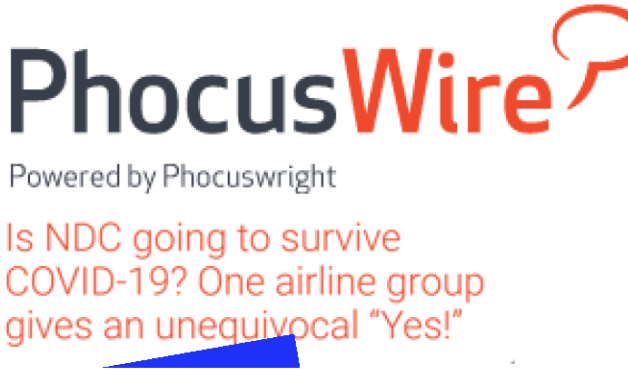
中国航信

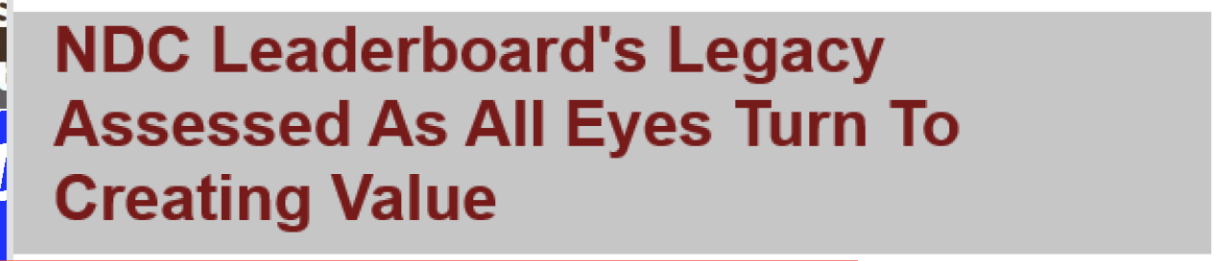
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疫情促使NDC采纳加速

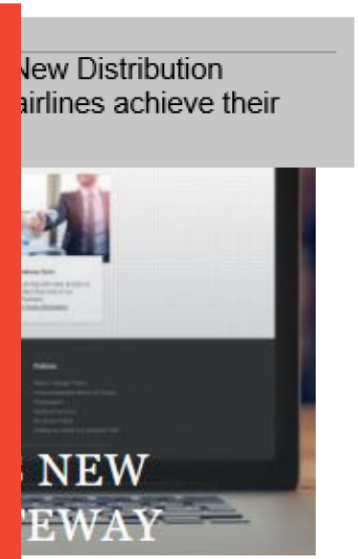












Airline Retailing & Value Creation

引领转向普惠

航空零售化
成熟度项目

扶持尚未开始转型的航司启程

促进正在转型的航司日趋成熟

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航空零售化成熟度指针

从三方面评测航司零售化成熟度

能力验证

IATA标准赋能的能力

合作伙伴部署

贯穿零售化价值链的
可扩展性

价值捕获指南针

获取潜在价值的成熟度

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谢 谢!



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问题

查阅网络研讨会记录:

china.datalex.com/后疫情时期航空公司的数字营销新起点