

It was game on at Elevate 2021 as we joined together in a global forum of airlines, sales channels, and technology innovators to discuss the future of airline retailing, including next-generation shopping, distribution, offer management, dynamic pricing, emerging technologies, and more.

WHO WE HEARD FROM

MEET THE PLAYERS

INDUSTRY REGISTRATIONS

FINANCING & RM	35%
SALES, FINANCING, REV ACCOUNTING	14%
IT & TECH	14%
DISTRIBUTION	9%
MARKETING & DIGITAL	9%
OTHER	19%

WHAT WE LEARNED

Elevate 2021 gave players a chance to explore fundamental questions associated with airline retailing through the 13 sessions offered.

- How can I improve the shopping experience (display) of my offer/product?**
 - Next Generation Storefront: The level up we've all been waiting for
 - The quest for the ultimate retailing experience
- How can I better construct my offer?**
 - British Airways' use of Dual RBD for Dynamic Pricing (case study)
 - United Airlines' use of Express Contracts (case study)
 - Exclusive sneak peek of Architect
- How can I improve my offer or is distributed?**
 - Getting NDC to scale: It's not really about the pipes anymore
 - Keynote by Jane Sun, CEO of Trip.com Group
- What should I be considering regarding settlement of the order?**
 - Keynote by Brian Barth, Founder & CEO of Uplift
- How can the ATPCO community and we make it happen together?**
 - New to the game? Here's how ATPCO can help
 - Emerging Tech starts with ATPCO
 - Why DEI is good for your bottom line
 - How Councils explore which paths we should take
 - Balancing the environment and your bottom line: A chat on sustainability

NEXT GENERATION STOREFRONT: THE LEVEL UP WE'VE ALL BEEN WAITING FOR

Despite recent advances in airline retailing, the airline shopping experience is still limited compared to other industries. ATPCO's Next Generation Storefront (NGS)TM is solving this problem.

NGS is a program that levels up the flight shopping experience, making it possible for travelers to shop for the products they want in a familiar, modernized way.

NGS has evolved significantly in the past two years as it's happening in brand new pieces of information—such as destination restrictions, change policies, and onboard health and safety practices—became critical to the shopping process. Fast, flexible, and scalable solutions such as ATPCO's Reassurance UPAs and multiple changes to flight shopping displays were urgently required and delivered.

As we come out of this, the biggest challenge is not how to level up, but how to be flexible in our retailing display because we don't know what's going to be next in terms of traveler demands.

—Anthony Salomone

NGS also supports the concept of shelves, which channels can use to organize different product types in ways that suit their customers. These data elements uniquely define and differentiate an individual airline's service or product, along with optional visual content. Here's how it works:

- Airlines participating in NGS file or receive their data to ATPCO.
- Next, NGS channels bring airline product attributes to life in the form of inspirational shopping experiences.

Any channel that uses ATPCO data and standards to evolve beyond single product shopping and enables consumers to shop for the products they want in an NGS channel.

NGS principles are live in action today, as demonstrated by a growing number of OTAs and corporate booking tools.

THE QUEST FOR THE ULTIMATE RETAILING EXPERIENCE

Achieving "right offer, right time" means balancing personalization and choice

The concept of the right offer at the right time is as old as the science of retailing. However, airlines and their partners must continually balance curated content and traveler-controlled choice in the shopping process. "One of the things you've realized is that when you focus too much on retailing, you can also kind of get into overweighing these consumers who are just checking flights."

—Anthony Salomone

The corporate world adds yet another layer of required balance. "It's a partnership between airlines, travel decision makers/travel buyers at companies, and their TMC partners. It's about aligning all to determine the best offer for the traveler based on preferences, but also balancing that with travel policy that's in place by the travel buyer."

—Rob Brown

Pricing consistency has never been more critical to consumer trust

As dynamic pricing becomes the new normal, ensuring pricing consistency across channels is increasingly important. If consumers feel the need to shop multiple times to see if prices are changing, or if prices are varying from a mobile device to a computer, airlines lose traveler trust. Therefore, it is imperative that airlines ensure consistency and a "single source of truth" approach across all channels.

"NGS helps address this requirement because the airline creates its own offer and becomes the single source of truth. NDC is exactly the type of thing that helps create that transparency."

—Tye Radcliffe

Speakers: Tye Radcliffe (VP of Product Strategy, Accelyta), Mira Sorrells (Senior Director, PhocusWire), Rob Brown (Senior Director, Strategy & B2B Channel, Southwest), Anthony Salomone (Director, Global Sales, ATPCO).

BRITISH AIRWAYS AND DUAL RBD: A PATH TO DYNAMIC OFFER CREATION (CASE STUDY)

British Airways was an early adopter of Dual RBD. The airline sought to improve its ability to compete with large low-cost carriers, the majority of which have no limitations on price points. Implementing Dual RBD solved this problem by offering multiple price points for the same product, resulting in favorable revenue. Because Dual RBD uses existing functions, it was integratable with other pricing in the market and flowed seamlessly through all systems, including settlement.

NGS principles are live in action today, as demonstrated by a growing number of OTAs and corporate booking tools.

Over 55 airlines are using Dual RBD today and see it as a significant step forward in the path to true dynamic pricing.

Find out what Jerry and Tom have to say about Dual RBD

CORPORATE CONTRACTS READY TO BOOK IN ONE DAY - A HAPPY SALES TEAM AND HAPPY CUSTOMERS (CASE STUDY)

Corporate contracts are fundamental for most airlines and their partners. But far too often, they are fraught with painful workflows that lead to lost revenue opportunities, coding errors, and frustrated corporate customers.

Express Contracts provides touch-free, end-to-end automation of corporate, private contracts, creating bookable fares quickly to the delight of customers and airlines sales teams. It requires only minimal fare filing expertise and it connects with your contract management system. Once set up, it automatically sends contracts to ATPCO to be published.

Over 90 percent of contracts filed in Express Contracts are in the market within two hours.

United Airlines faced frustrated customers and sales teams because it took a long time to bring new contracts to market.

The pandemic provided an unexpected opportunity to experiment with automating the process of filing corporate contracts, which yielded extremely positive results.

"Our sales team started filing contracts in less than 24 hours. These days it takes 2-3 weeks to get fares filed to something that is generally much faster, usually same day."

—Glenn Hollister

Speakers: Glenn Hollister (Vice President, Sales Strategy & Effectiveness, United), Swati Sharma (Manager, Integrations, ATPCO).

WE ASKED THE ELEVATE AUDIENCE WHAT ARE YOUR BIGGEST PAIN POINTS WITH CORPORATE CONTRACTS?

TIME TO MARKET FROM SALES TO FILING	32%
RESOURCE CONSTRAINTS	29%
EMERGING TECHNOLOGIES	16%
CORPORATE TRAVELER CUSTOMER SATISFACTION	16%

EXCLUSIVE SNEAK PEEK OF ARCHITECT

Data is the foundation of all airline pricing. But with advances in airline retailing and other strategies, the method by which airlines create and manage their pricing rules is growing exponentially. How can airlines manage this flood of data?

Airlines need to respond quickly to the millions of competitive changes in markets every day, but it's virtually impossible for analysts to manipulate, analyze, and keep up with all that data.

With fare data exploding, automation is the only path forward.

Architect is ATPCO's premiere pricing tool, providing the latest in automation, workflow simplification, and management of dynamic pricing rules. The system offers a streamlined, efficient workflow where analysts can make decisions and take actions on a single screen, be alerted of key market events and trends, define, refine and implement business rules automatically. Designed for flexibility, Architect's automation and functionality can grow with your airline's evolving market needs.

Focus Architect, your team can work on managing strategies, not fares and mechanics. The result? Reduced complexity, increased pricing capabilities, and better decisions.

Speakers: Will Underman (Director, Global Sales, ATPCO).

DO YOU HAVE THE AUTOMATION TO ADAPT TO THE TRENDS WE ARE SEEING?

INTERVIEW WITH BRIAN BARTH, FOUNDER & CEO OF UPLIFT

How can airlines drive more leisure demand, conversions, and revenue? Easy customer financing can be part of the answer.

In this session, Alex and Brian talked about how Uplift works in the area of customer financing and payments, specifically buy now, pay later (BNPL).

BNPL is one of the fastest-growing areas of payments, serving suppliers and travelers alike. With BNPL, consumers can pay for a trip over time using small monthly or weekly amounts without interest or late fees. Approval is handled instantly, making it possible to offer financing to a wider range of travelers through traditional credit to offer approvals. More than 60 percent of people in the United States have tried BNPL, representing all age groups and demographics.

BNPL offers a powerful new way to appeal to and increase demand in the leisure market for airlines and other travel suppliers. Travelers who may have been putting off a trip can now book now and pay over time.

Creative marketers recognize that incorporating BNPL as part of the offer can lead to double-digit increases in conversion earlier in the funnel. "When you start thinking of it more as a marketing tool, you realize you need to get that messaging out last but not first, it only see it at the last part hidden in checkout, didn't influence what they chose to do and buy," observed Brian. "And so, as you bring it upstream and up funnel, that's where the real power of this is."

For suppliers offering BNPL, the results have been impressive. According to Brian Barth, Uplift partners experience a 20 percent increase in checkout size. In addition, the appeal of paying later motivates shoppers to book earlier, which increases the booking window, making it easier for airlines to fill flights and manage load factors.

Speakers: Alex Zoghlin (President & CEO, ATPCO), Brian Barth (Founder & CEO, Uplift).

20X People buy more, 20% more, as evidence in checkout size.

40X People book 40% earlier, as seen through a longer booking window.

GETTING NDC TO SCALE: IT'S NOT REALLY ABOUT THE PIPES ANYMORE

NDC has moved well beyond its early days of commercial and technical debates. The percentage of direct connect (NDC) bookings in the indirect channel doubled from five to ten percent during 2020, and is projected to increase.

Constituents across the value chain agree: NDC is here. It is the method by which airlines connect most effectively to their ultimate consumers in indirect channels. The question is: how do we take NDC to its next level? In this session, our panel of esteemed industry experts identified three key requirements for NDC at scale.

Three must-haves for NDC at scale:

- More differentiated airline content
- Differentiated airline content via compelling, relevant offers is the single biggest driver of NDC adoption.
- Defining the "special sauce" of the airline's offer is the heart of a successful NDC strategy. "Once we stopped comparing ourselves and we started focusing on what makes us different, we started to see value proposition that we bring to the table, that's where our strategy really came alive."

—Tina Larson, Hawaiian Airlines

Speakers: Cory Garner (Co-CEO & President of Distribution, ATPCO), Tina Larson (Managing Director, Sales Strategy & Alliances, Hawaiian Airlines), Mark Ridley (Head of NDC, Amadeus), Jim Davidson (Chief Product Officer, Accelyta), Graham Wareham (Managing Director, Partnerships, ATPCO).

KEYNOTE BY JANE SUN, CEO OF TRIP.COM GROUP

Jane Sun is one of the most powerful women in the world. In this session, Jane shared with Alex three high priorities for the industry's largest OTA.

Helping partners reach Chinese travelers

Chinese travelers represent the fastest-growing segment in the global travel market, accounting for 10 percent of the total GDP associated with tourists and tourism. Trip.com routinely works with its travel partners to round the world to increase tourism from China.

Jane offered three suggestions for destinations and suppliers to grow business with Chinese travelers:

- Make the visa application process easier and available online
- Offer more direct flights from major cities in China
- Have a Welcome Chinese program that includes menu options and local language speakers in hotels and call centers

Leadership and support during the pandemic and recovery

Trip.com used a three-pronged approach to lead through the pandemic, focusing on customers, partners, and employees.

Watch the interview

NEW TO THE GAME? HERE'S HOW ATPCO CAN HELP

In 2021, there is no doubt that the game has changed for everyone in the travel industry.

As an airline-owned entity connecting airlines, systems, and sales channels, ATPCO plays a foundational role in the evolution of airline retailing, distribution, industry standards, governance, and collaborative innovation.

This session gave Elevate attendees a view into today's ATPCO and its unique place in the industry.

ATPCO is:

- A partner to over 600 airlines, systems, and channels
- The industry source for airline pricing and shopping data, covering more than 90 percent of the world's flight schedules
- A supplier of essential infrastructure for the global airline distribution ecosystem
- A provider of industry standards and governance that ensure consistency and interoperability no matter what product is being sold, by whom, or in what channel
- Trusted as a neutral, airline-owned entity that exists to return value to the industry

Speakers: Andrea Bonaiuto (Managing Director, ATPCO Marketing), Doug Sharpe (Head of Brand & Partner Success, ATPCO).

WE ASKED THE ELEVATE AUDIENCE WHICH TOPICS WERE OF MOST INTEREST TO YOU?

INDUSTRY STANDARDS	100%
REVENUE LOSS FROM TRAVELERS	100%
EMERGING TECHNOLOGIES	100%
NEXT GENERATION STOREFRONT	100%
GETTING BUILT INTO THE NDC PIPELINE	100%
NEW DISTRIBUTION CHANNELS	100%
FINANCIAL CAPACITY	100%

Get the whole story

EMERGING TECH STARTS WITH THE CLOUD

What do dynamic pricing, digital transformation, airline retailing at scale, and omnichannel distribution have in common? They are most often happening in the cloud!

In this session, David and John explored the benefits of moving travel companies see the cloud as a way to accelerate innovation, lower costs, and meet the changing demands of travelers.

According to David, the pandemic and subsequent recovery were something of a wake-up call for travel. "The breadth, the scale, and duration brought about by the pandemic certainly led to a sustained shift in the way I think travel and hospitality companies plan, manage, and operate their businesses."

Cloud technologies—in contrast to traditional on-premises operations—offer multiple advantages. IT leaders have noticed that moving to the cloud can deploy new solutions worldwide in a matter of minutes. Innovation and experimentation can thus happen faster and more efficiently. The cloud's elasticity makes it possible to scale capacity up and down as needed, enabling companies to trade capital expense for a variable "pay-as-you-go" model.

Speakers: David Peller (Managing Director, Travel & Hospitality, AWS), John Murphy (Chief Investment Officer, ATPCO).

"This period of disruption showed all of us how essential reinvention is for travel and hospitality companies."

Covid-19 Accelerated Digital Transformation Efforts

Understand more about the cloud

WHY DIVERSITY, EQUITY, AND INCLUSION (DEI) IS GOOD FOR YOUR BOTTOM LINE

DEI (Diversity, Equity, and Inclusion) is a business strategy that focuses on creating a more inclusive and equitable workplace. In this session, Keya and Amy discussed why DEI is the right thing to do and the smart thing to do in the airline industry and beyond.

"Diversity opens up a whole new world of talent for us to tap into and make it seem very timely, timely and like it was feel-good work. But I think companies have finally embraced the fact that this has to be a business imperative because it absolutely impacts revenue, turnover, retention, and the ability to measure their performance."

—Moya Bordeaux

Delta Air Lines is a recognized leader in DEI. For over five years, Keya has led the airline's more than 7500 employees in a comprehensive diversity, equity, and inclusion strategy.

"Our goal is really to transform our organization from the inside out. But that's not a one-time thing. It's a continuous effort. We want to do it actually do something that makes us even bigger than the way people define us as an airline. I really think this type of work gives all of us and our respective companies an opportunity to really make a meaningful contribution to society."

—Keya Lynn Johnson

A fundamental aspect of DEI is normalizing conversations—even uncomfortable ones—that were not happening in the corporate world until recently. Leaders must be prepared to handle situations where there are not always clear answers but rather an emphasis on understanding different points of view.

Keya likes soccer and Identy struggles to bagpack. We carry it around with us always. "The greatest challenge has actually been getting people comfortable that this is an environment where you can share what's in your carry-on bagpack without the concern that it's going to impact the business."

Speakers: Keya Lynn Johnson (Vice President, Equity & Inclusion Officer, Delta), Moya Bordeaux (Chief People & Culture Officer, ATPCO).

87% of millennials consider a diverse workplace an important factor when they're deciding whether to accept a position.

83% of millennials feel more confident when they work in an inclusive work environment.

Companies with diverse leadership teams are 45% more likely to report increased market share.

Ethnically diverse companies are 35% more likely to have positive financial returns.

Watch the conversation

HOW COUNCILS EXPLORE WHICH PATHS WE SHOULD TAKE

ATPCO Councils: Industry collaboration in action

ATPCO Councils are a special force designed to drive innovation at scale across the travel industry. Composed of established leaders and decision-makers, ATPCO Councils address top industry issues and develop relevant standards and solutions with a clear focus on speed, accuracy, and industry adoption. In this session, Councils leaders from Air Canada, Amadeus, British Airways, Delta, and Travelport discussed how Councils are gaining from idea to action to resolve faster than ever before.

Panelists represented each of ATPCO's five targeted councils, which support innovation across the entire travel ribbon: Offer Content, Distribution & Infrastructure, Customer Care, Settlement, and Market Tools.

The work of the Councils—particularly around standards and transparency—is foundational to addressing significant changes taking place in airline retailing, such as dynamic offers evolving to be far more than just the price, and NDC distribution adapting to support a range of airline strategies while still maintaining a standard that can scale.

Automation of customer care is another critical area of Council focus, recognizing that today, 40 percent of refunds are still handled manually.

"Our industry cannot afford to lag behind in automation. We need to be able to enable digital actions and we need to do that in all circumstances, even in unexpected circumstances. And this is exactly what we are aiming for with our ATPCO Customer Care Council. We have defined a clear objective: one hundred percent automation of changes."

—Herve Prezest

Today's ATPCO Councils use a new format and structure designed to maximize transparency, collaboration, and results. "I think the new structure is actually going to enable the councils and the participants to be more focused on setting the directions and take a more strategic approach."

—Stefania DiGesu

Looking ahead: Dynamic Offers are a top priority

Audience members identified dynamic offers as the number one issue for Councils to tackle, with several other hot topics close behind.

Speakers: Pamela Burns-Thomas (Head of Global Product Management, Travelport), Cesar Rincon Mateus (Managing Director, Commercial & Development, Delta), David Smith (Head of Standards & Marketing, ATPCO), Keith Wallis (Senior Director, Distribution & Payments, Amadeus), Stefania DiGesu (Product Support Manager, British Airways), Herve Prezest (Vice President, Amadeus).

Learn about each council

BALANCING THE ENVIRONMENT AND YOUR BOTTOM LINE: A CHAT ON SUSTAINABILITY

Sustainability is critical to the future of the airline industry. In this session, Vince and Amelia discuss strategies to fight climate change and accelerate the path to carbon neutrality, all while keeping an eye on a healthy bottom line. Here are a few highlights:

Question: Last year Delta made a one billion dollar commitment to become the first carbon neutral airline. What was behind that strategy?

Answer: When we made that decision, we were acknowledging the fact that our customers, today, our travelers, are facing a conflict and we want to take that conflict away from them. And that the conflict is—and especially the younger generation that is starting to grow more whether it's for business or for leisure—they want to be part of helping to save the planet. They want to see that the planet when it comes to climate change, but they also love travel.

Carbon neutrality allows Delta to take action now. We're so proud of being able to go back to our consumers now and say, you don't have to choose between saving and saving the world. That at Delta, we've got your back and we will continue to be committed to carbon neutrality.

Question: How has Delta balanced sustainable initiatives relative to profit motives as an investor-owned, publicly traded company?

Answer: I think in the past, it was a tough discussion for corporations to have. But the acceleration of ESG (environmental, social, and governance) in the last 18 to 24 months, especially from investors, puts at the forefront the risk of not prioritizing sustainability. From an investor standpoint, it means that there are real-world costs that will come for companies that cannot transition. We don't have to look too much farther than the oil and gas industry to see where some of those problems are coming in, where they're getting angry and saying, "we're losing access to capital. And so I think part of it is kind of anticipating what the future cost may be if we don't deal with it now."

Speakers: Amelia DeLuca (Managing Director, Sustainability, Delta), Vince Palmiere (Chief Financial Officer, ATPCO).

"How does sustainability impact customer loyalty?"

"Very strongly! We polled a group of our Sky Miles members just a couple months ago and said there's a whole host of different things that the airlines participate in, trying to do good in the world. What is the number one issue to you? And responsibility, the top issue was sustainability."

Watch the video

Reach out to continue the conversation

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