

**IATA  
INNOVATION  
DAY**

Geneva, Switzerland  
28 June 2023



# IATA INNOVATION DAY

Geneva, Switzerland  
31 May 2023

## Welcome Remarks

### Muhammad Albakri

Senior Vice President, Financial Settlement and  
Distribution Services, IATA



**IATA  
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Geneva, Switzerland  
28 June 2023

## **Legal Briefing**

**Daniel Kanter**

Assistant Director Legal Services, IATA



## What does the Future Hold?

# Bojun Wang

Economist

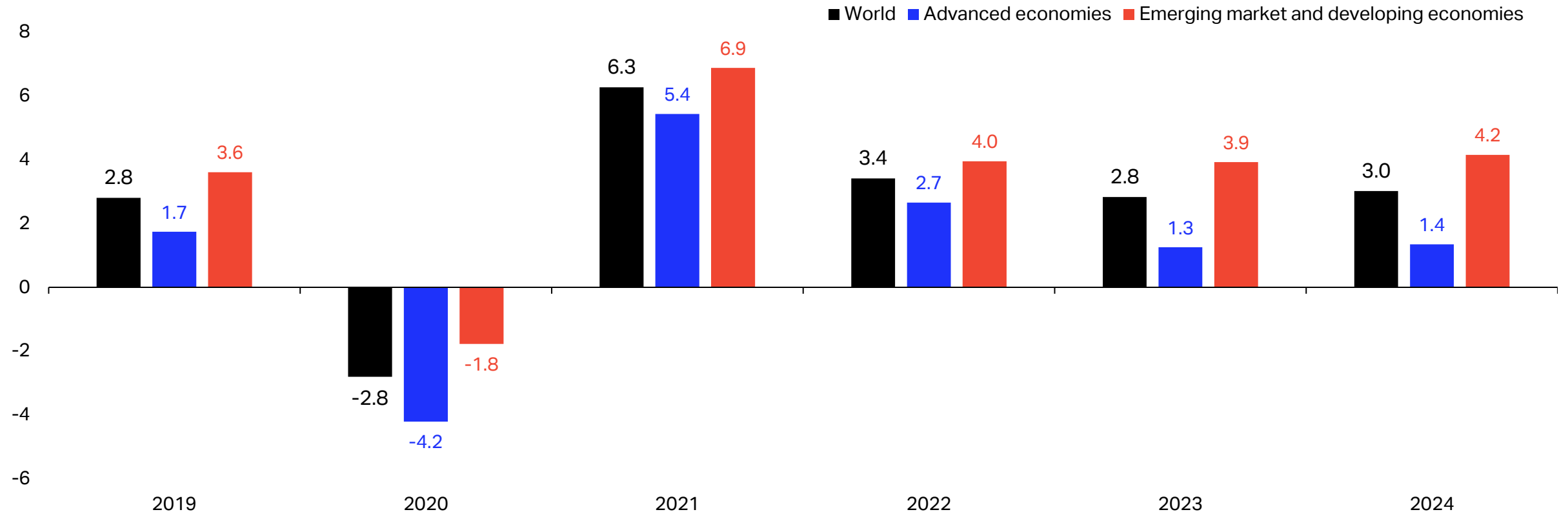
IATA Sustainability & Economics



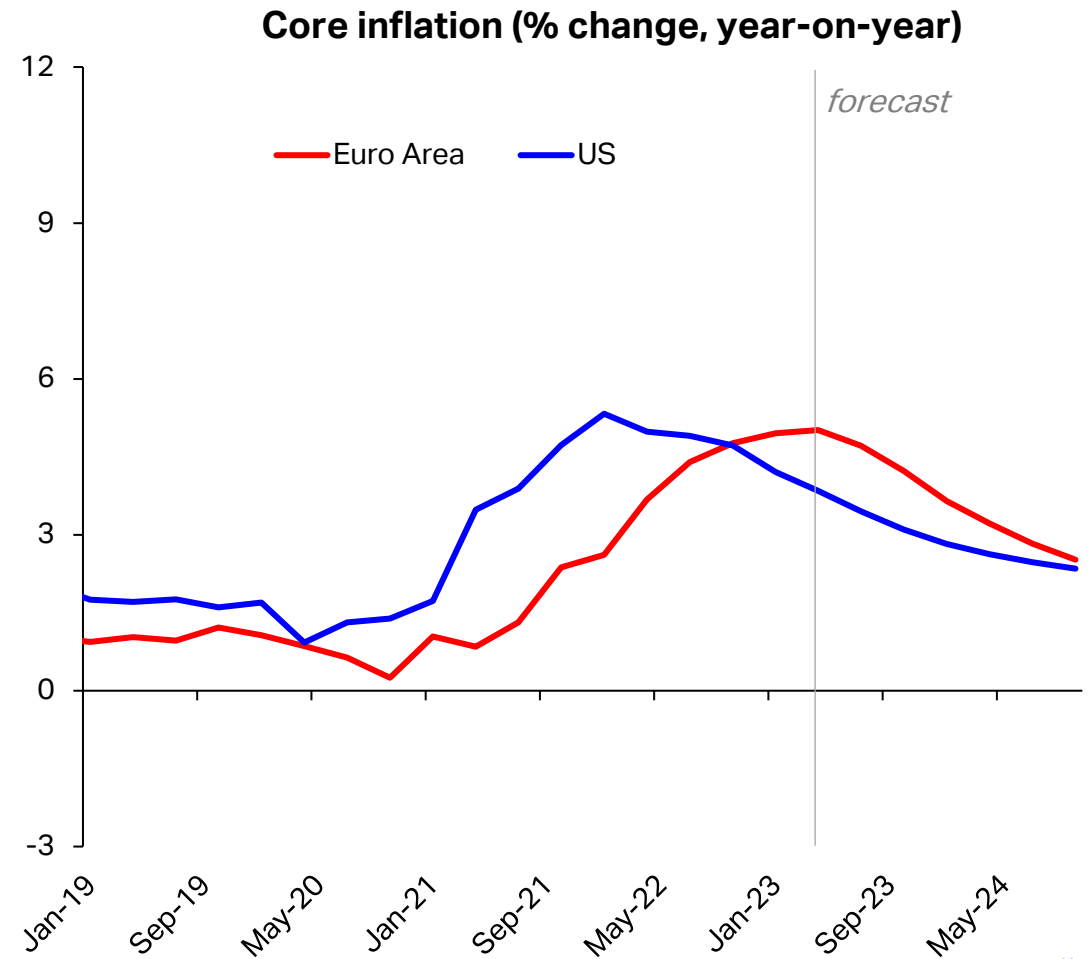
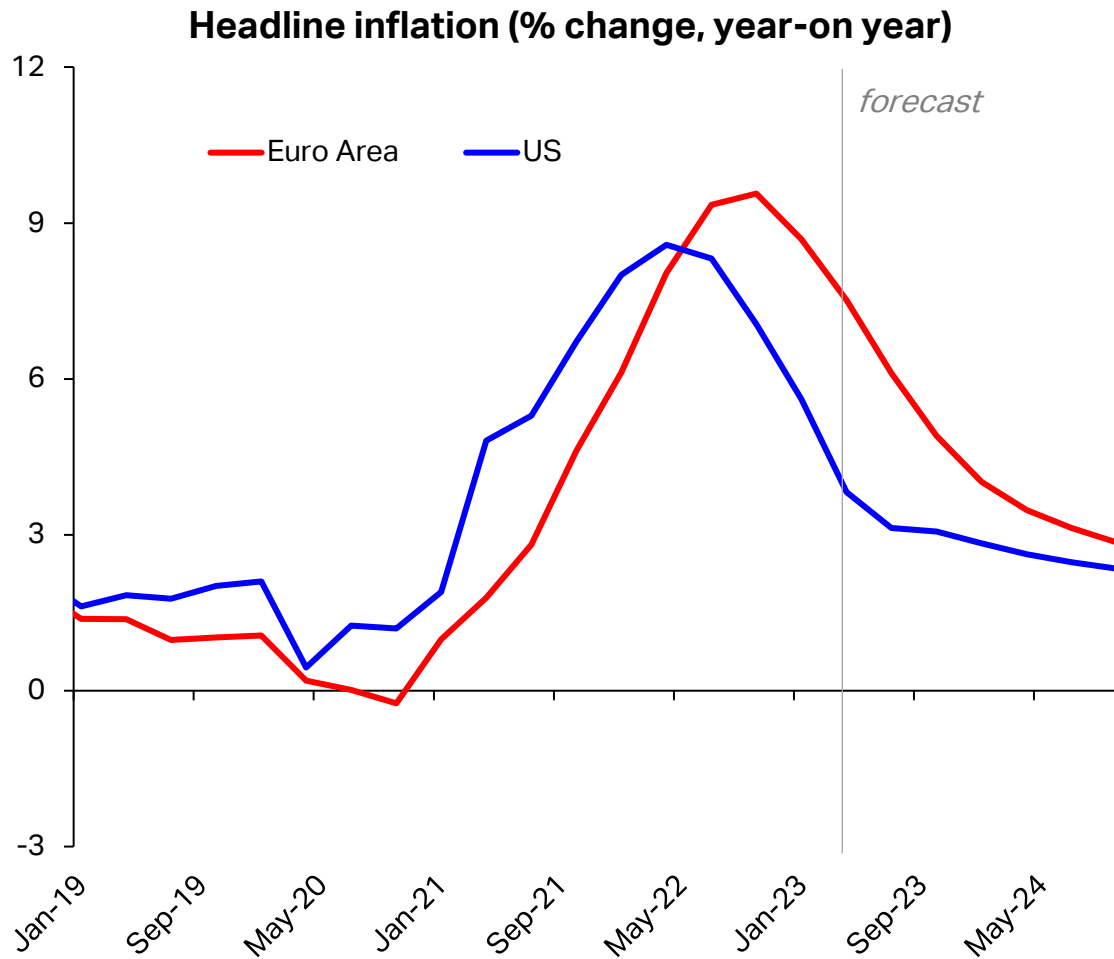
# Global GDP growth slows to 2.8% in 2023

Advanced economies to slow down further, from 2.7% in 2022 to 1.3%

Real GDP growth (% change, year-on-year)



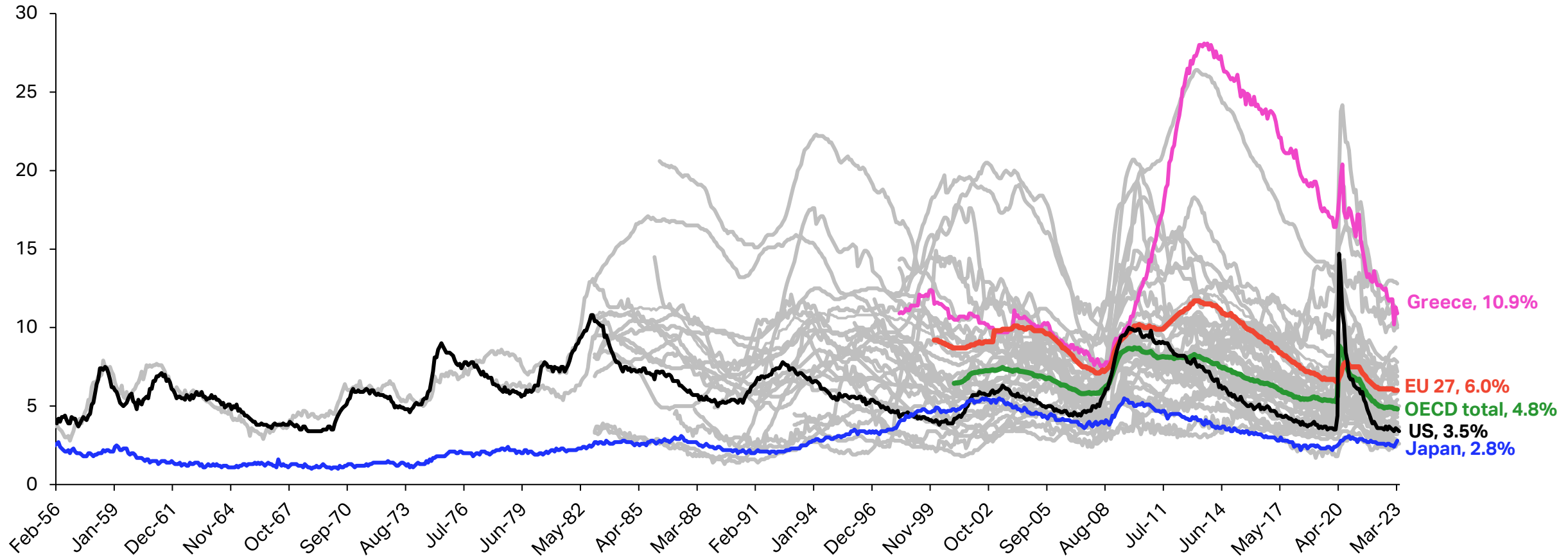
# Headline inflation likely peaked in 2022



# Labor markets remain tight

## With the unemployment rate at historic lows

Unemployment rate, % share of labor force



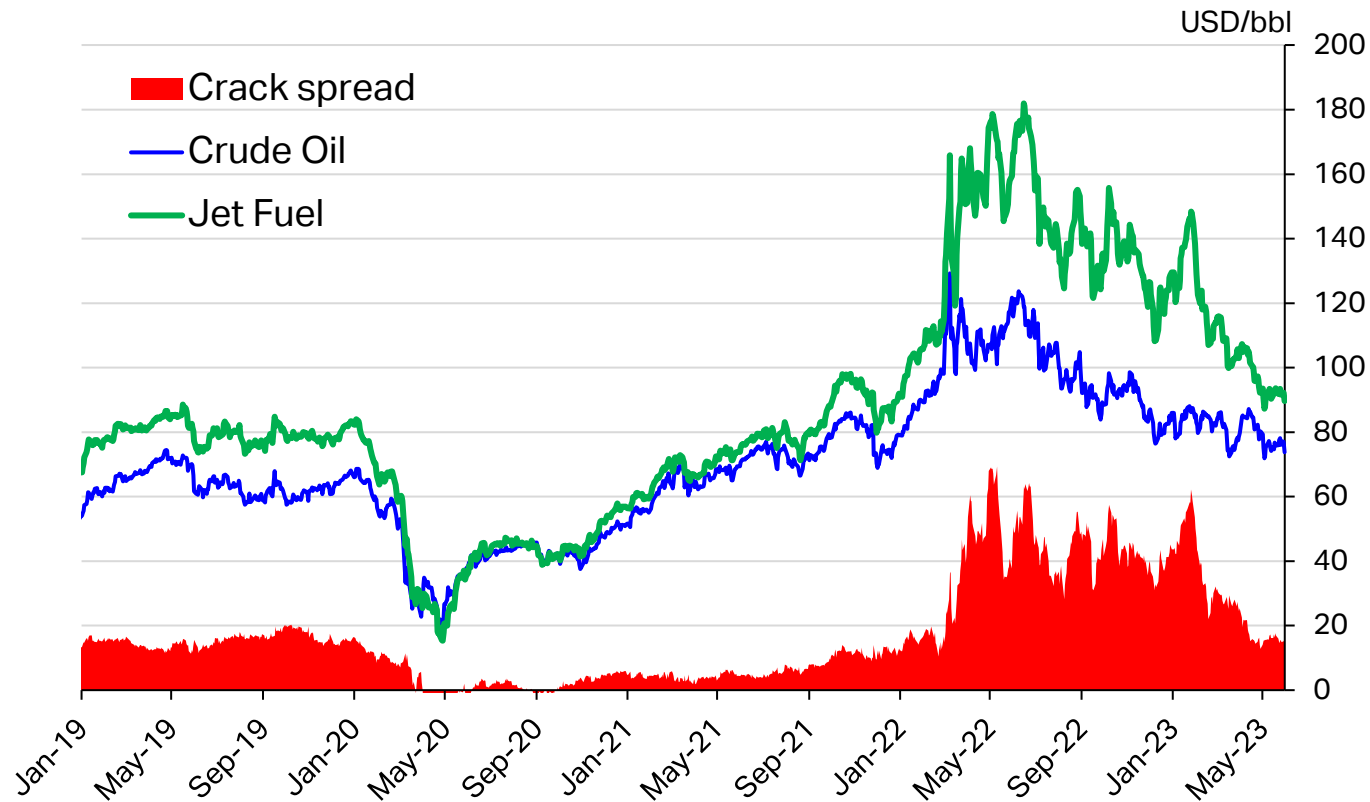
Source: IATA Sustainability and Economics using OECD Statistics



# Pressures on operating costs peaked in 2022

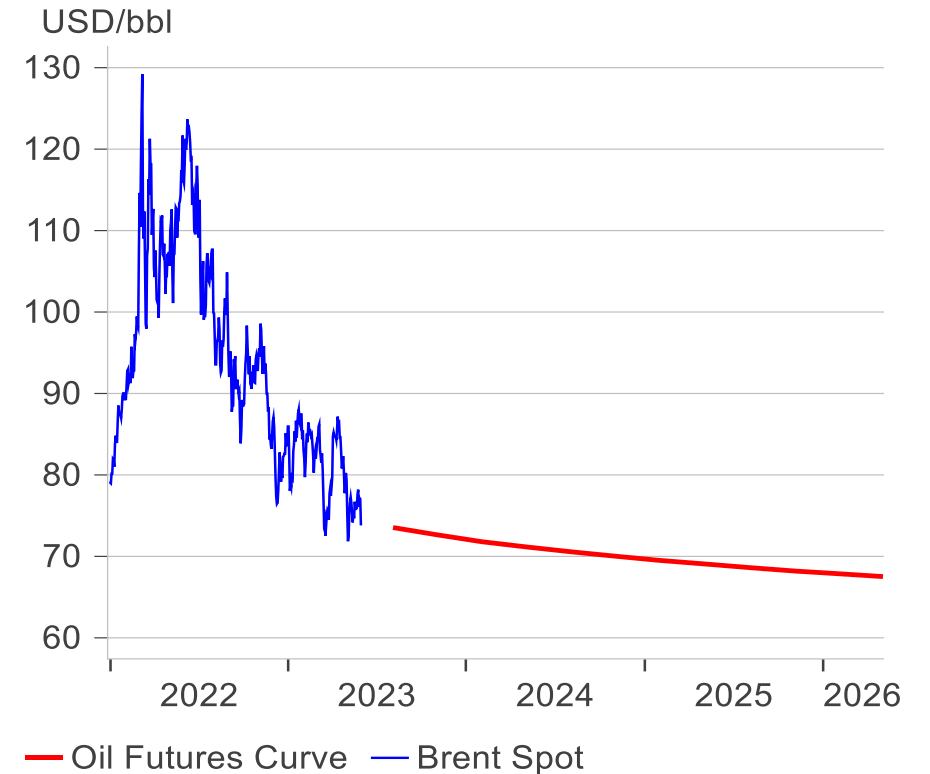
## Jet crack spread also narrows

### Jet fuel price and crude oil price



### Brent Oil, Spot Price

ICE Oil Futures as of 31-May-23 (qtrly)



Source: IATA Sustainability and Economics, Platts – S&P Global, Macrobond

MACROBOND

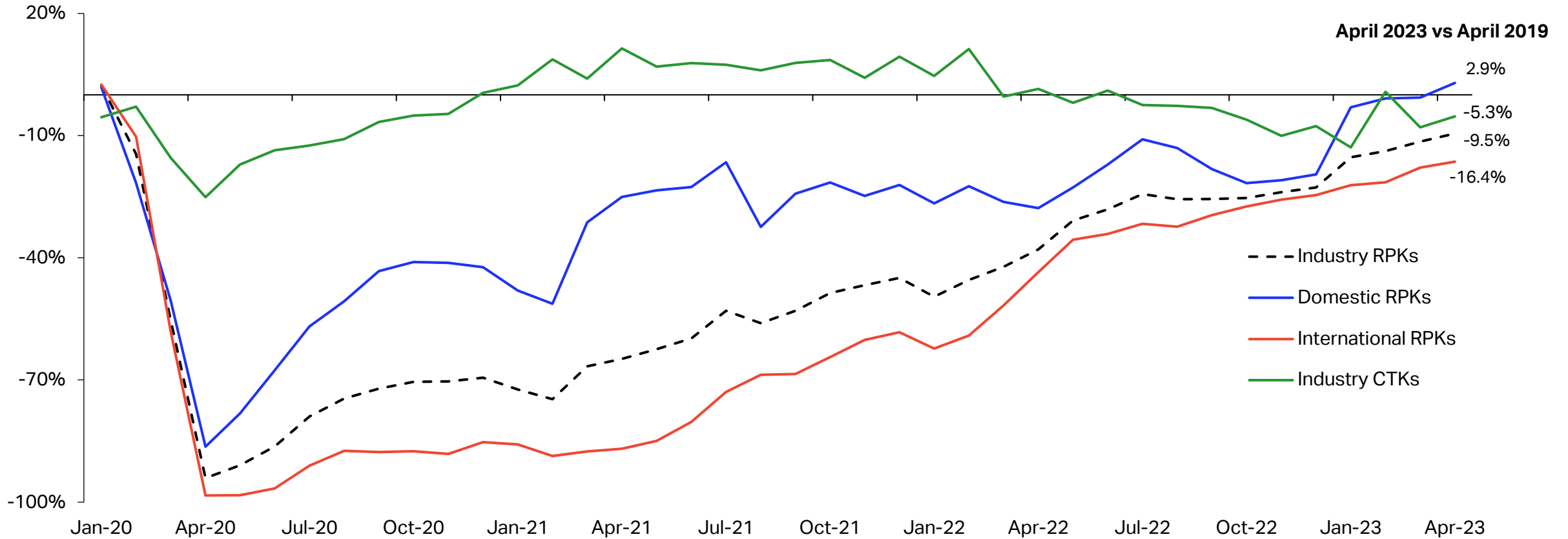




# International RPKs on the rise and domestic recovered

## Industry-wide CTKs are currently 5.3% below 2019 levels

Industry CTKs and RPKs, year-on-year % change vs 2019



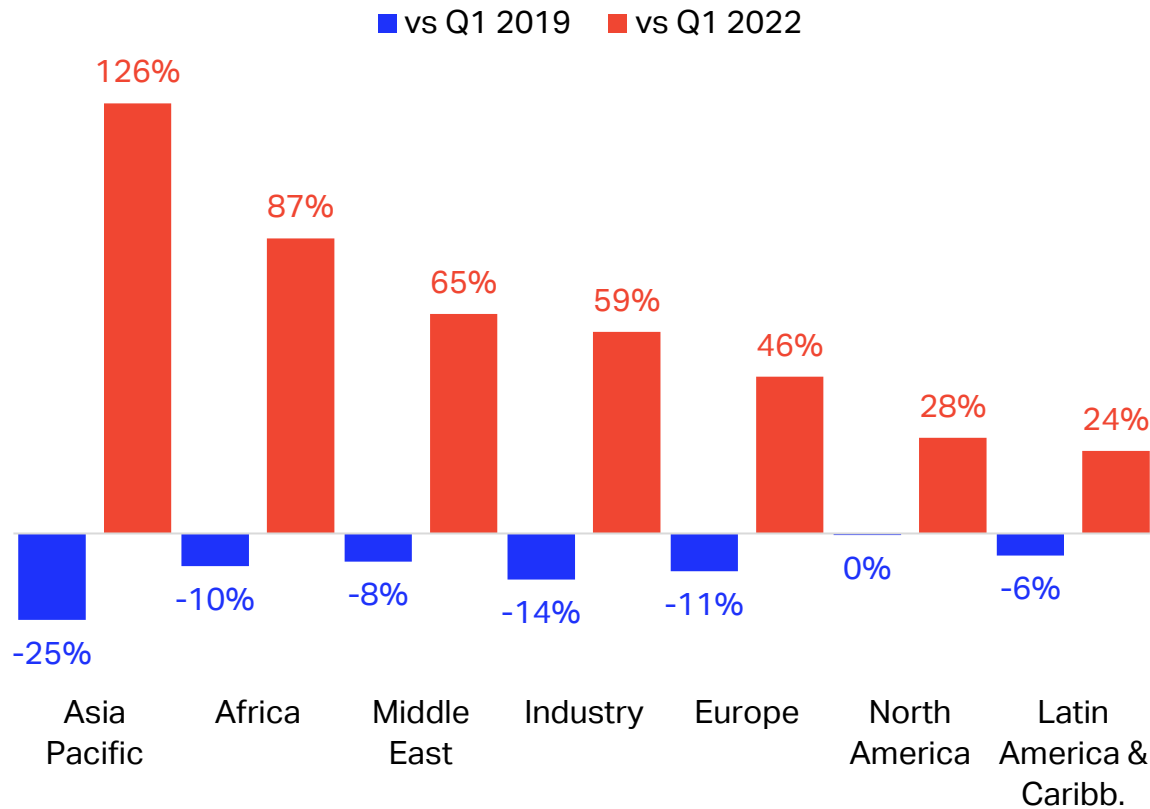
CTKs: Cargo Tonne-Kilometers; RPKs: Revenue Passenger-Kilometers



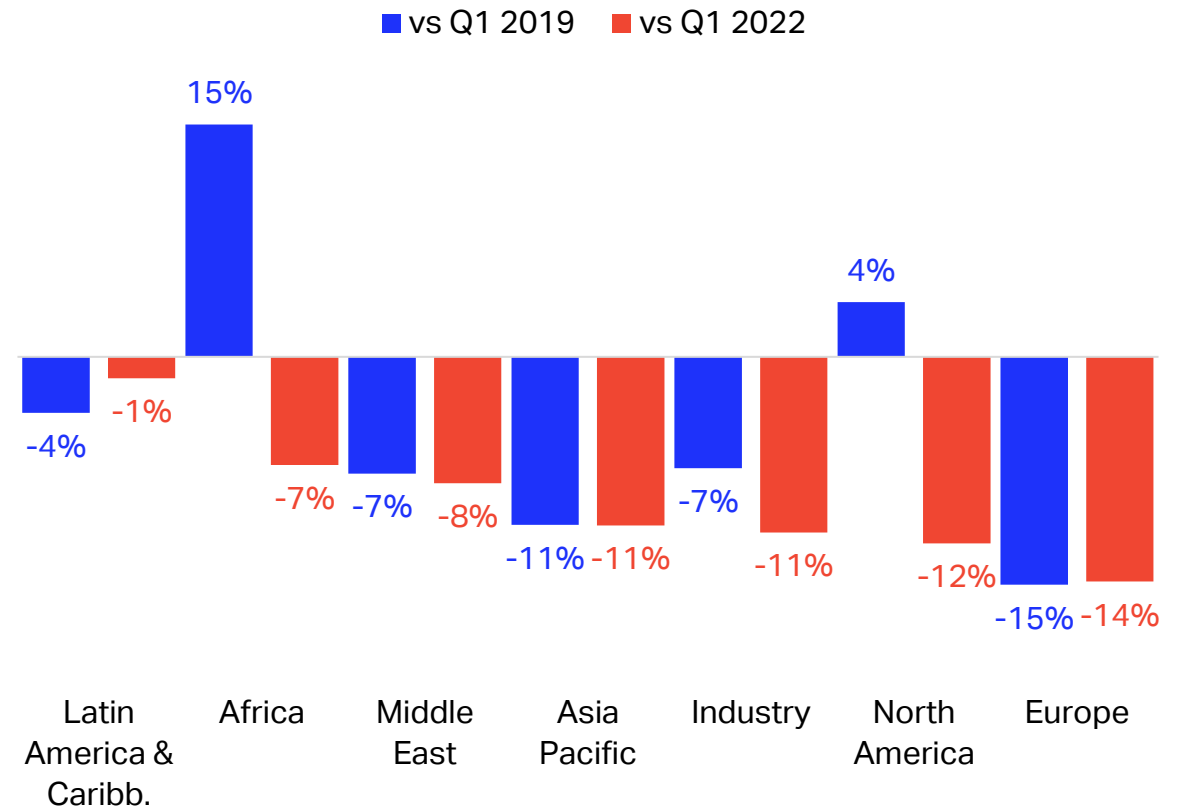
# Global recovery momentum pursued in Q1 2023

Asia Pacific passenger traffic surged, mixed outcome for cargo for all regions

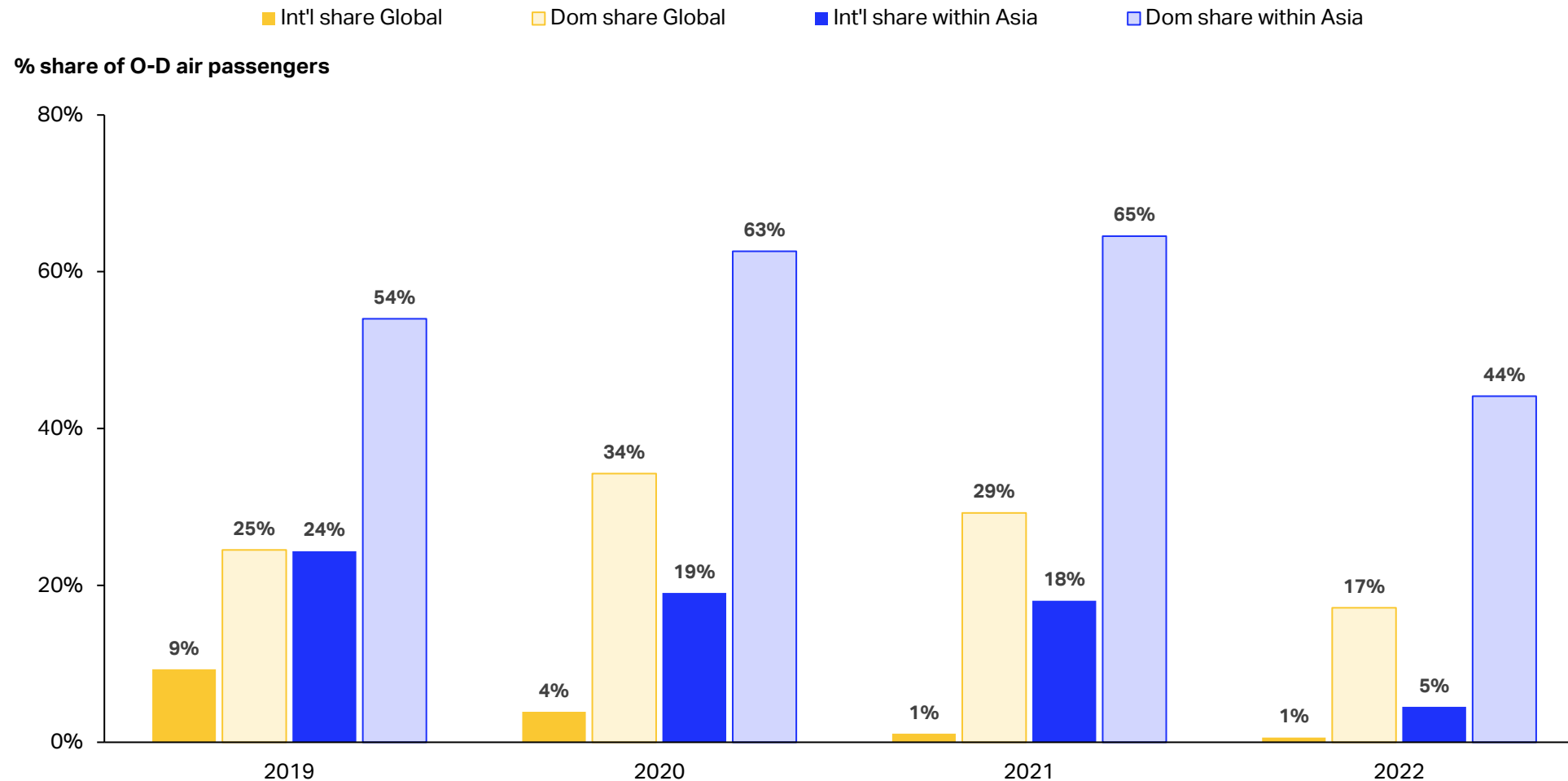
Q1 2023 total RPKs, year-on-year change (%)



Q1 2023 total CTKs, year-on-year change (%)



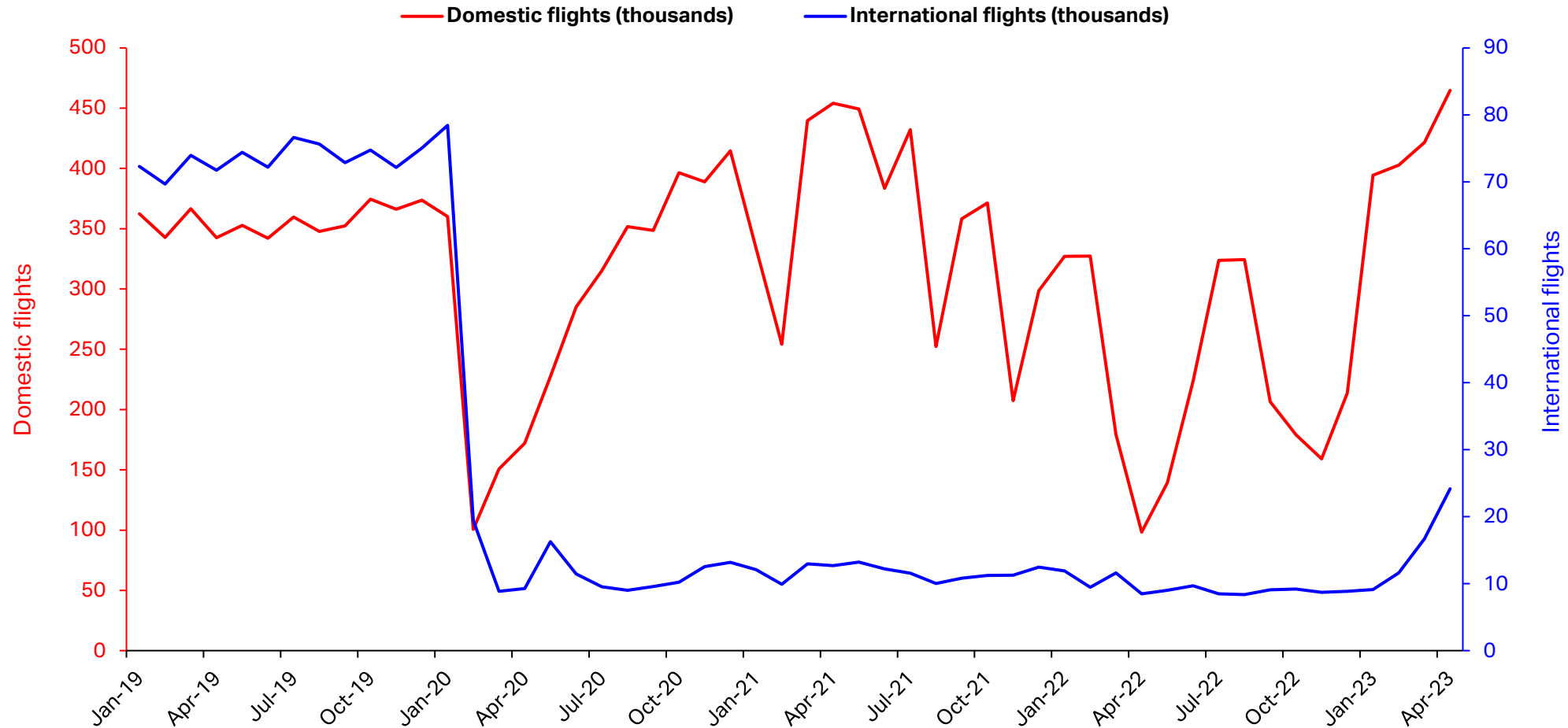
# China's share of air passenger markets



Source: IATA Sustainability and Economics, using data from DDS for inbound and outbound origin-destination (O-D) passengers

Note: Based on OAG data, scheduled seat capacity shares of China in 2019 were 9% of global international, 22% of global domestic, 17% of international within Asia, and 51% of domestic within Asia.

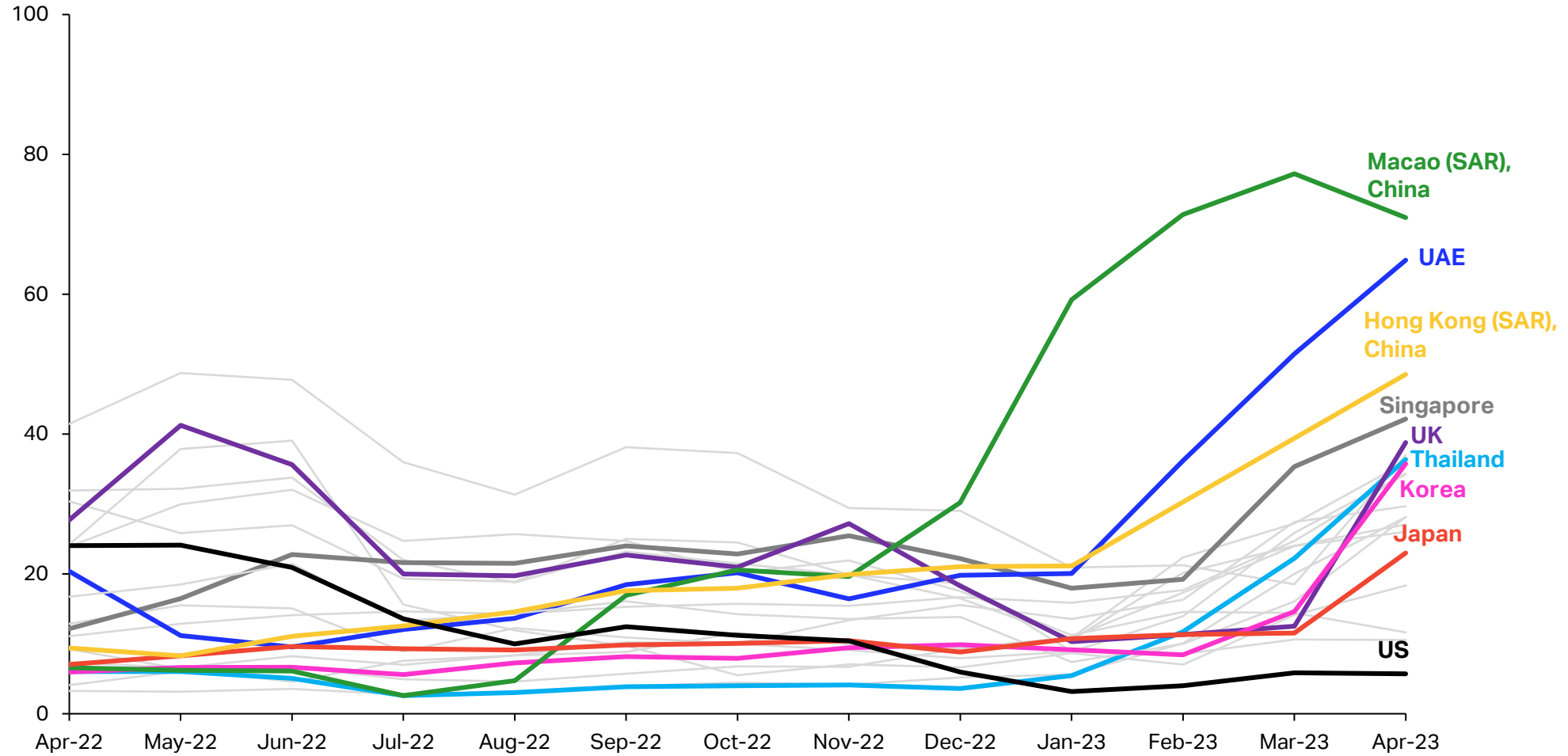
# China's domestic and international monthly flights



Source: IATA Sustainability and Economics, market statistics compiled by IATA using FlightRadar24 under license

# Status of China's international inbound capacity

Inbound monthly international and regional flights to China by origin market (Indexed, 2019 = 100)

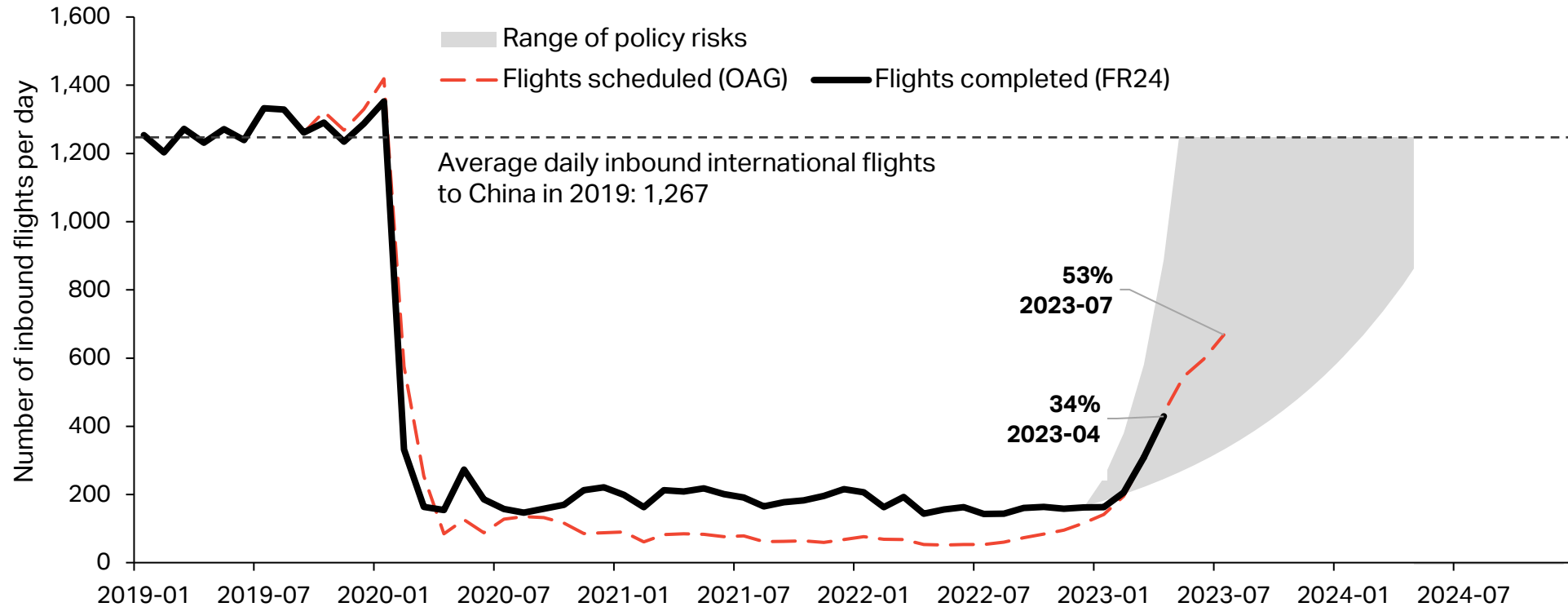


Source: IATA Sustainability and Economics, market statistics compiled by IATA using FlightRadar24 under license



# Outlook for China's international aviation market

Recovery profiles for inbound international flights to China



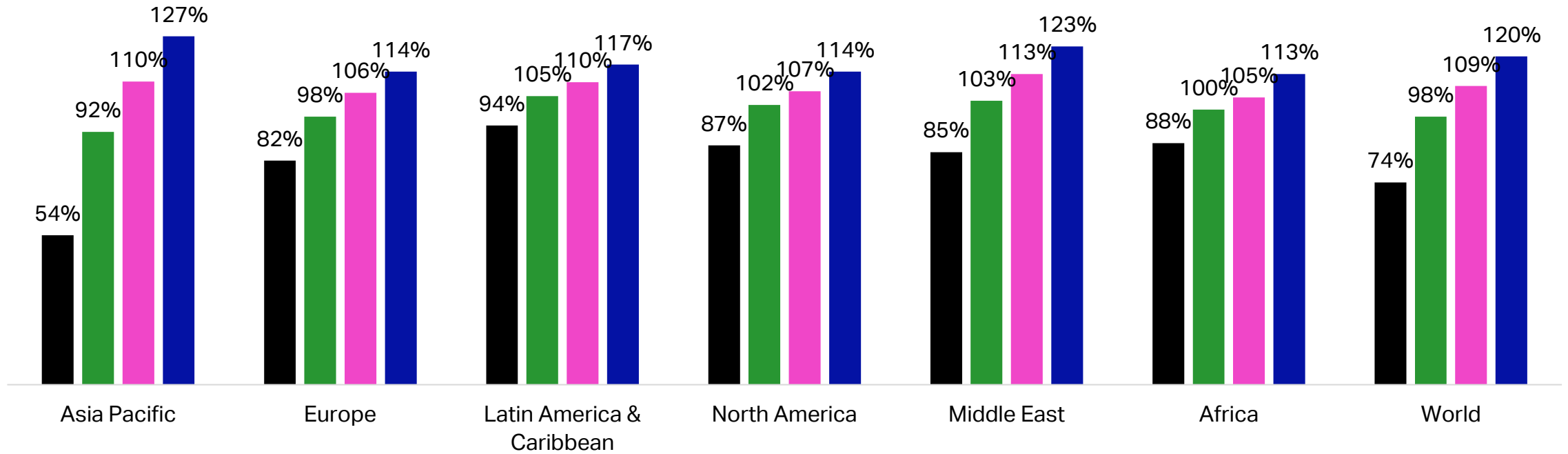
Recovery profiles	Apr 2023	Jul 2023	Sep 2023	Dec 2024	Mar 2024	Sep 2024	Average daily flights added each month for full recovery
Scheduled-based recovery trend	34%	53%	65%	87%	>100%	>100%	95+ flights
Downside risk	19%	26%	32%	43%	53%	>100%	60+ flights

# Forecast upgrades reflecting recent developments

## Africa, Middle East and Americas to recover in 2023

Passenger traffic recovery (% share of 2019)

■ 2022 ■ 2023 ■ 2024 ■ 2025



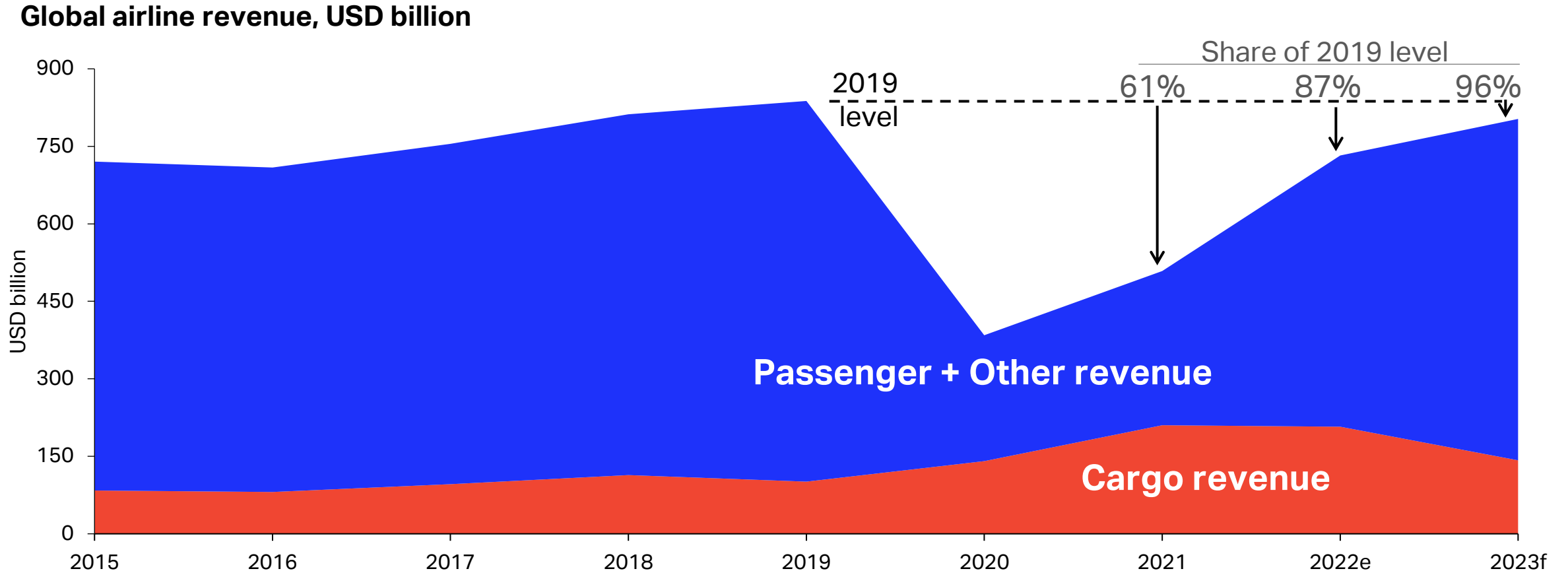
**Recovery year**

2024	2024	2023	2023	2023	2023	2024
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Source: Tourism Economics/IATA Sustainability and Economics Air Passenger Forecasts as of June 2023

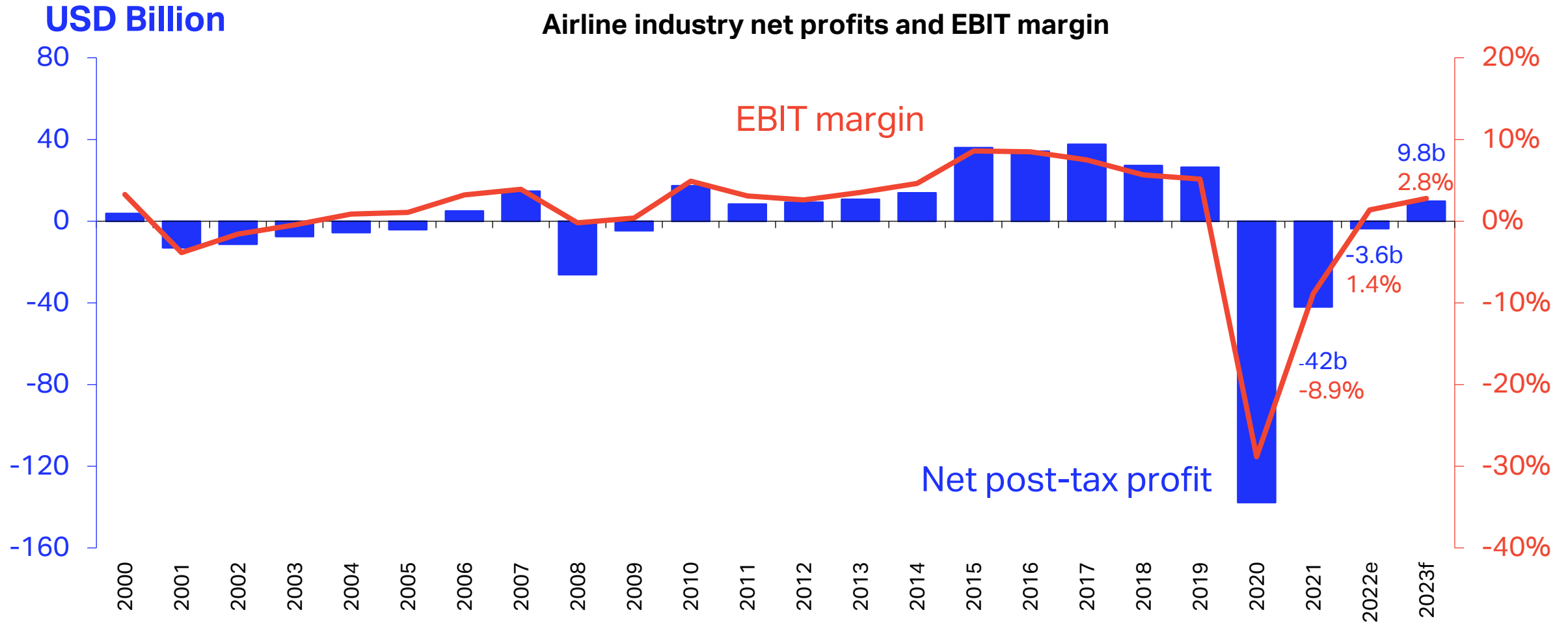


# Global airline revenue, USD billion

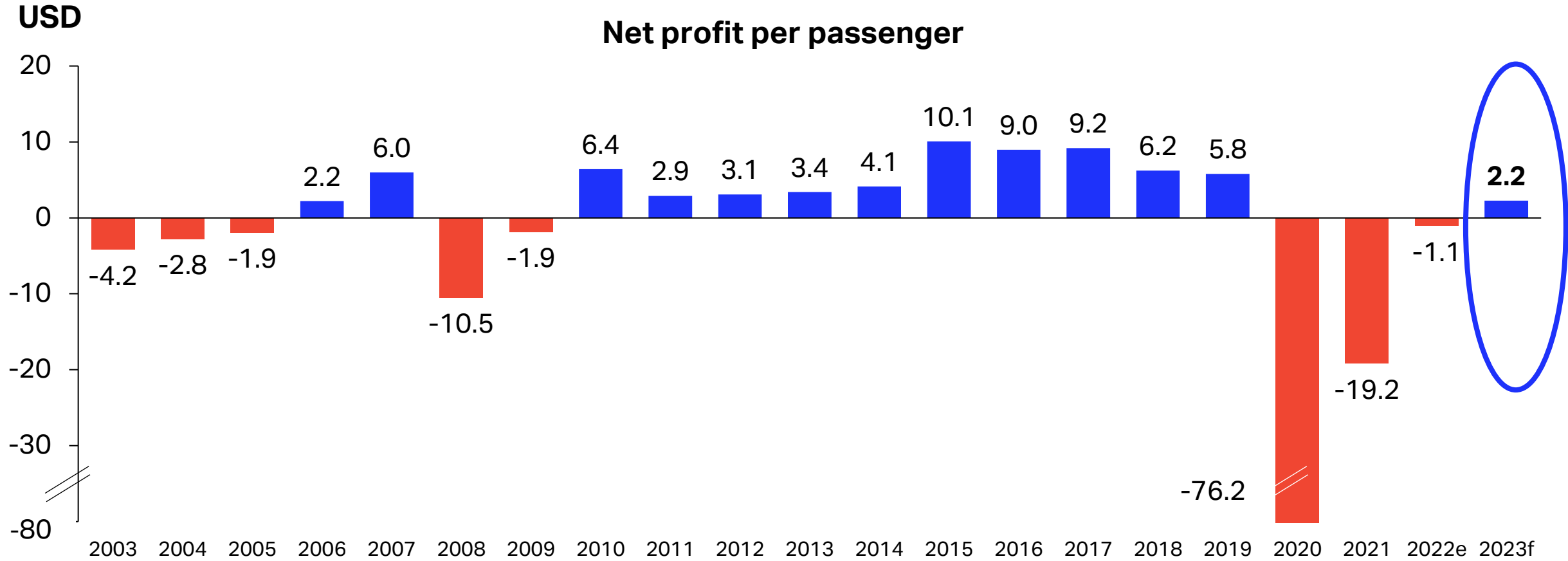




# Net profit of USD 9.8bn forecast in 2023



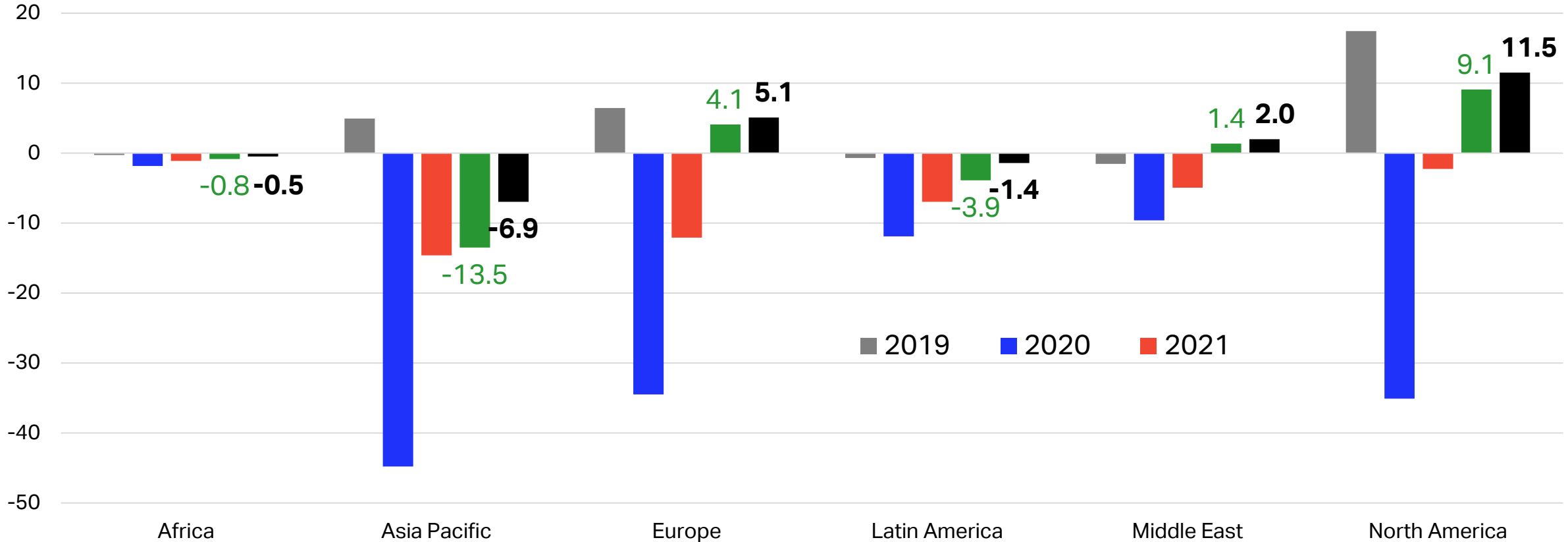
# Slim profits at just USD 2.2 per passenger



# Profits vary across regions

Regional net profit (USD bn)

USD billion



# Thank you!

IATA Economics

[economics@iata.org](mailto:economics@iata.org)

[www.iata.org/economics](http://www.iata.org/economics)



## Understanding the Industry's Strategic Direction

**Stephan Copart**

Head of Digital Transformation, IATA



Upon advice from DAC, DTAC & IFAC,  
IATA's **Board of Governors**  
supported a cohesive program to help  
**move away** from **legacy**



A new **cohesive program** to  
unleash **value creation** and  
**customer centricity...**

# Modern Airline Retailing

To become **truly customer centric** airlines need a **legacy-free** framework with **Offers & Orders**



Retailing with **Offers**

Delivering with **Orders**

Customer **Identification**



## Finnair to go all-in on NDC by 2025

© 16 September 2021

## Air France-KLM : « Objectif 2027 : 90% des ventes indirectes via NDC »

Par David Keller - 23 avril 2023

## AA: 80 Percent Of Bookings Could Come Direct Or Via NDC By Year-End

Jay Boehmer April 27, 2023

## SAS unveils NDC strategy with Amadeus partnership

© 23 March 2023

Images not loading... or having trouble viewing this email? [View Online](#)



Australian Trade Advice



Important Update: KrisConnect NDC changes from 1 June 2023

Issued 05 May 2023

### Global Air Tech

## Global Air Tech: An American revolution, as NDC takes off



Alex Irving, CFA  
+44 207 170 0539  
alexander.iring@bernstein.com

The legacy GDS world is being turned upside down through once-in-a-generation technological change and the rise of NDC. The old three-player oligopoly is collapsing, being replaced by a more competitive market. While this has until now been primarily a European story, carriers across the Americas are finding the confidence to follow their peers from across the Atlantic and implement incentives to spur NDC adoption. With American leading the charge, the floodgates are open: change is set to take off.

[DISTRIBUTION](#) • [SERVICE](#) • [SUPPLIERS](#)

## American Express Global Business Travel Sets Minimum NDC Requirements

Jay Campbell - February 15, 2023

## Southwest Eyes Alternatives For Defunct NDC Exchange

Jay Boehmer February 10, 2023

## Amadeus CEO Eyes 2024 For NDC Booking Critical Mass

Amon Cohen May 9, 2023

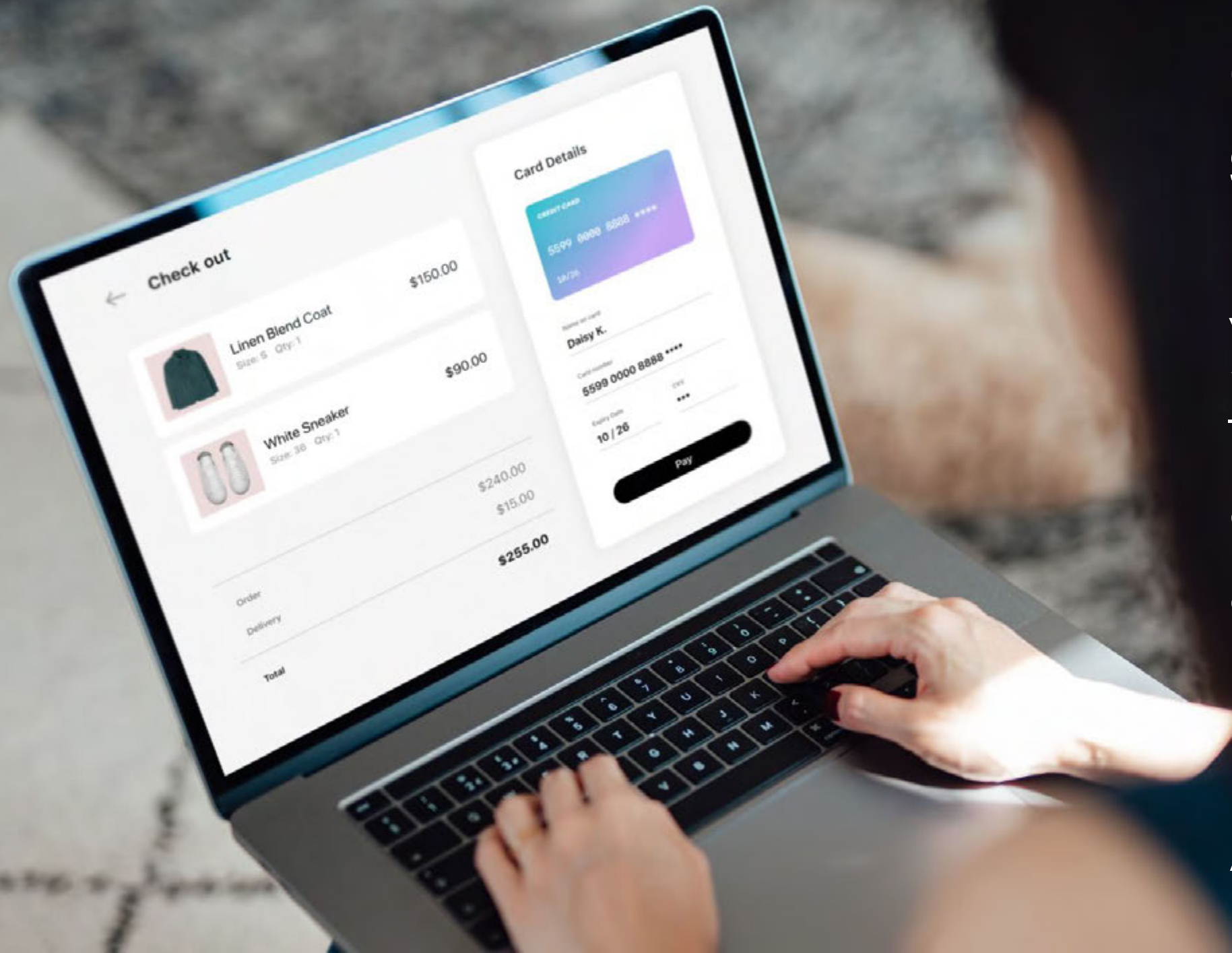
AVIATION

## Air Canada lays out NDC strategy, including a surcharge on legacy GDS bookings

By Jamie Bieslada | Apr 19, 2023



Today, the industry is **constrained and limited** by the legacy standards, processes & technology in place.



**One single record** of your order – easily accessible and modifiable, like on Amazon

# IATA Consortium airline members

AIRFRANCE **KLM**  
GROUP

  
Emirates

 **LATAM**

 **QATAR**  
AIRWAYS القطرية  
GOING PLACES TOGETHER

American Airlines 

**FINNAIR**

**LUFTHANSA GROUP**

**SINGAPORE**  
**AIRLINES** 

 厦门航空 **XIAMENAIR**

**BRITISH AIRWAYS** 

**IBERIA** 

الطيران العماني  
**OMAN AIR** 

 **TURKISH AIRLINES**

# What will the program deliver?

## Customer identification

Standards enabling airlines to use **customers digital identities** to make better personalized offers and deliver them ; and standards enabling airlines and their value chain partners to **process the digital identity** of each other

## Retailing with offers

Standards enabling airlines to **build new partnerships and create products**, distribute **dynamically priced** and **personalized** offers and generate further revenue through **cost-effective digital payment options**

## Delivering with orders

Standards enabling customers to access their **Order in a single record** (without the need for PNRs, e-tickets & EMDs) as the sole reference for the purchased services and enabling **simplified financial processes** (incl. settlement)

- And new standards are required: ONE ID, Verified Credentials, NDC, ONE Order, Settlement with Orders, Dynamic Offer Creation, Future of Interline & New Partnerships

# 2023 Innovation Themes

## Focus on Modern Airline Retailing

### Customer identification

Customer identity in service  
delivery

Customer identity in retailing

Digital identity of value chain  
partners

### Retailing with Offers

Creating products and building  
new partnerships

Distributing priced personalized  
offers

Choice of digital payment options  
available to Customer

### Delivering with Orders

Offers fulfilled with orders only

Modern financial processes

Delivering on new partnerships  
with offers and orders only

## **Panel**

### **What do the Customers Want?**

**Shaunelle Harris Drake**

Head Implementation,  
Distribution, IATA

**Lenny Hornsby**

Travel & Travel  
Technology Manager,  
Deloitte

**Ann Dery**

Director, Global Category  
Lead, Travel & Meetings,  
Johnson & Johnson

**Claudia Adams**

Travel Manager  
Allianz





## **Panel**

## Hearing from the Leaders

### **Yanik Hoyles**

Director of Distribution  
IATA

### **Keith Wallis**

Senior Director  
Distribution & Payments,  
Air Canada

### **Kerem Kiziltunc**

CIO  
Turkish Airlines



**COFFEE &  
NETWORKING BREAK**



## **Industry Innovation**

Who is in the Digital Innovation Ecosystem?

**R. Kat Morse**

Senior Manager, Innovation & Partnerships, IATA



## **Innovating with Startups:**

Accelerate @ IATA Segment 4: Personalization

## **Paula Pardo Esteve**

Manager Ideation, Strategy and Partnerships, IATA



**fullstory**

A photograph of an airport terminal interior during sunset. The scene is dominated by large windows that offer a view of the tarmac and several airplanes. The sky is a mix of orange, yellow, and blue. In the foreground, the silhouettes of three people are visible against the bright light from the windows. One person in the center is pulling a suitcase, while another person to the right is carrying a backpack. The ceiling of the terminal has a series of parallel wooden slats that create a rhythmic pattern across the top of the frame.

**Helping Airlines Perfect  
Their Digital Experience**



We prevent Airlines losing  
Customers and Money by identifying  
poor Web & App Experiences

# **\$8 Billion** opportunity for Airlines by addressing **Payments** through Digital Experience

- *Increasing Ancillary Sales*
- *Enhancing Loyalty Programs*
- *Giving Customers Flexibility*



McKinsey  
& Company

# What Digital Experience Means For Your Customers




64%

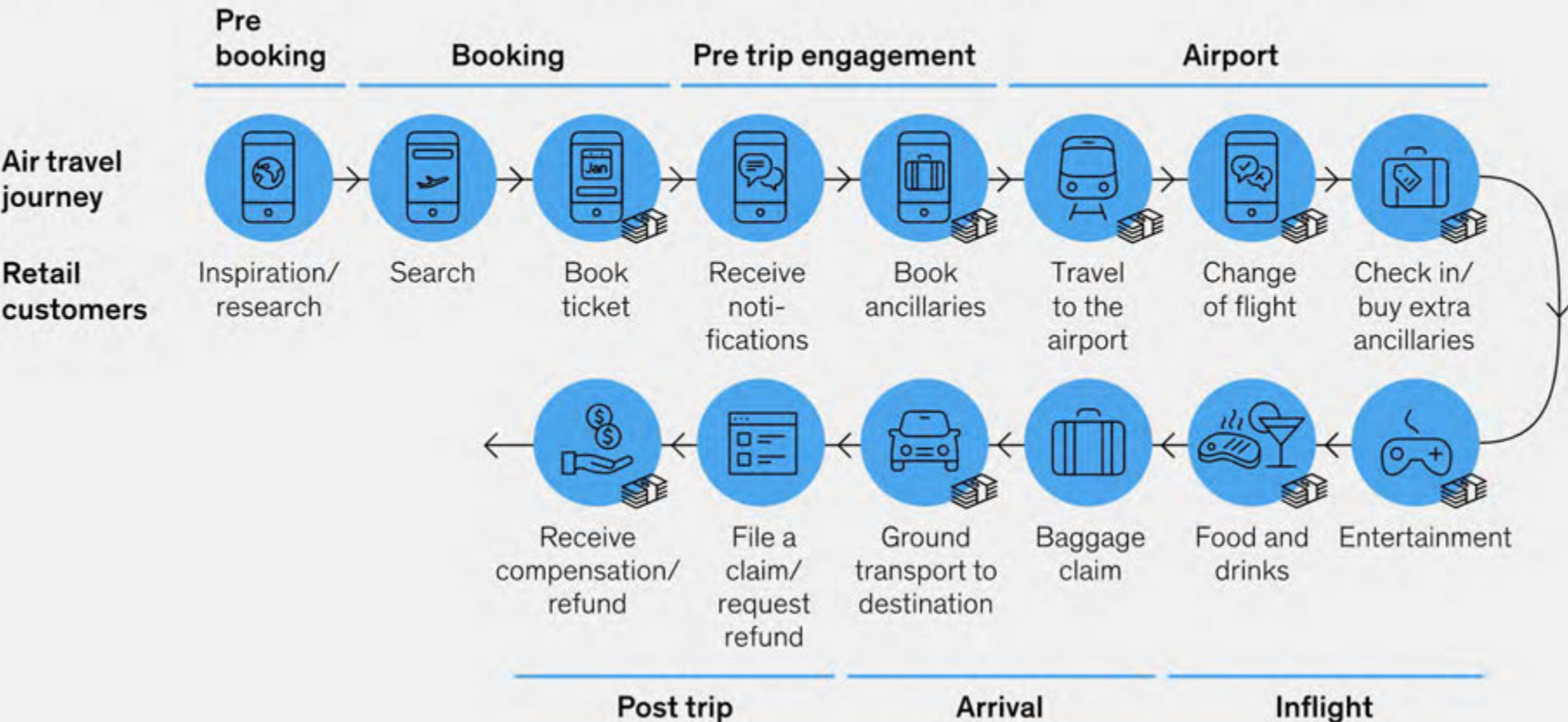
of global consumers **are likely to leave** without completing their transaction **if they encounter a problem or frustration online.**



# Payment is involved in ~10 touch points for leisure traveler journey.

Retailing scenario – Payment and retailing opportunity in 2030, \$ billion

 Payment involved



# Customers Paying for Convenience



**58%**

of consumers **would pay more**  
**for a flawless digital experience.**

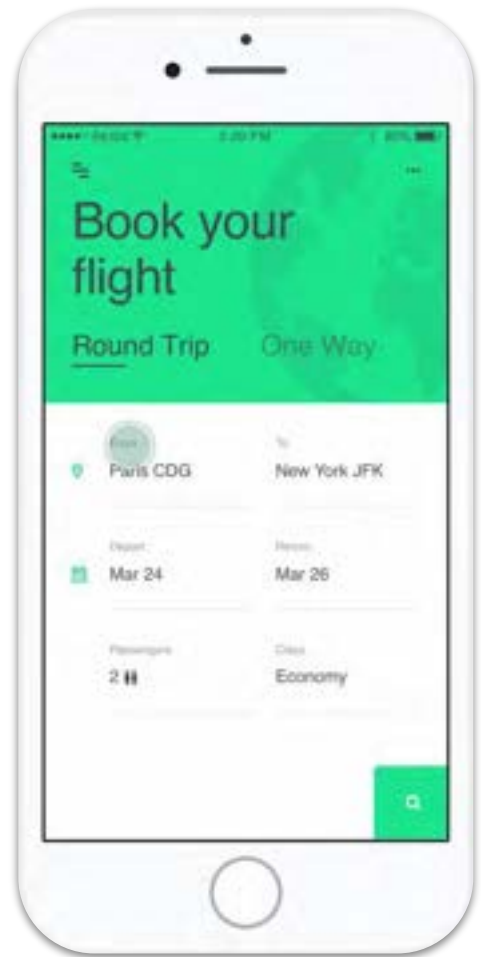
- Willing to pay 25% more
- Willing to pay 5% more
- Willing to pay 15% more
- Unwilling to pay more



In 2019, **31%** of travel bookings were made on a **Mobile device**.

This jumped to over **41%** in 2021.

...And is **expected to be over 55%** by the end of 2023.





Ben Hizak



★ 30 September 2022

Clearly they never use their own app This app is error prone and generally unclear. Logins within logins. What a confused mess.

3 people found this review helpful

Did you find this helpful?

Yes

No



K C

★ May 24, 2022

The app is almost useless. Can't really do anything apart from buying tickets. Changing/cancelling can't be done (actually, neither can their website) and the "chat" is a useless bot that can only put you in an endless queue to talk to a real person... and that's if you're lucky, 90% of the time it's just "too busy right now". Also, when they changed my flight, they displayed a connection time of ~3h-40min, which is just mindblowing.



andrew betts



★ January 2, 2023

Poor. I have a ticket which allows me to change my flight, but each time I try I'm told there has been an unexpected error and to try again. So, useless!

1 person found this review helpful



Anna Lindgren



★ February 22, 2023

Apps claims "network lost" after returning whenever one has navigated away from it. Since credit card verification while paying necessarily takes one out of the app, the experience is extremely confusing when the app brings me back to an empty search instead of an order confirmation.



Orsolya Kelemen (Sicamica)



17 November 2022

I missed my flight because the app didn't open for 1 whole hour to access my boarding pass. There is no other way to get your boarding pass, not even after logging in online! If you're developing such a unreliable app at least send the boarding pass via e-mail after check-in.



Oloo Oudia



7 June 2022

The app, and the website too, are really clunky. Both user interfaces lack fluidity even when I accept browser cookies. It just takes unusually long to load things. Will give a better rating once you improve both the app and webpage.



Angy Wan



23 February 2022

Cannot book any flights on this app. It seems as if they have deliberately set it not to book and keeps sending error messages. Poor, poor, poor and dishonest. If I could rate less than one star I would.



CHIEF OF DIGITAL & E-COMMERCE

*“Why are we not generating the anticipated revenue through our digital channels?”*

HEAD OF MOBILE



*“We have limited visibility on the customer experience our Mobile Apps”*

SR. DIGITAL PRODUCT OWNER



*“Customer needs are changing more rapidly than we anticipated”*

HEAD OF ANCILLARY SALES



*“We’re unable to determine the most effective place to position ancillary products in the booking flow”*

CTO

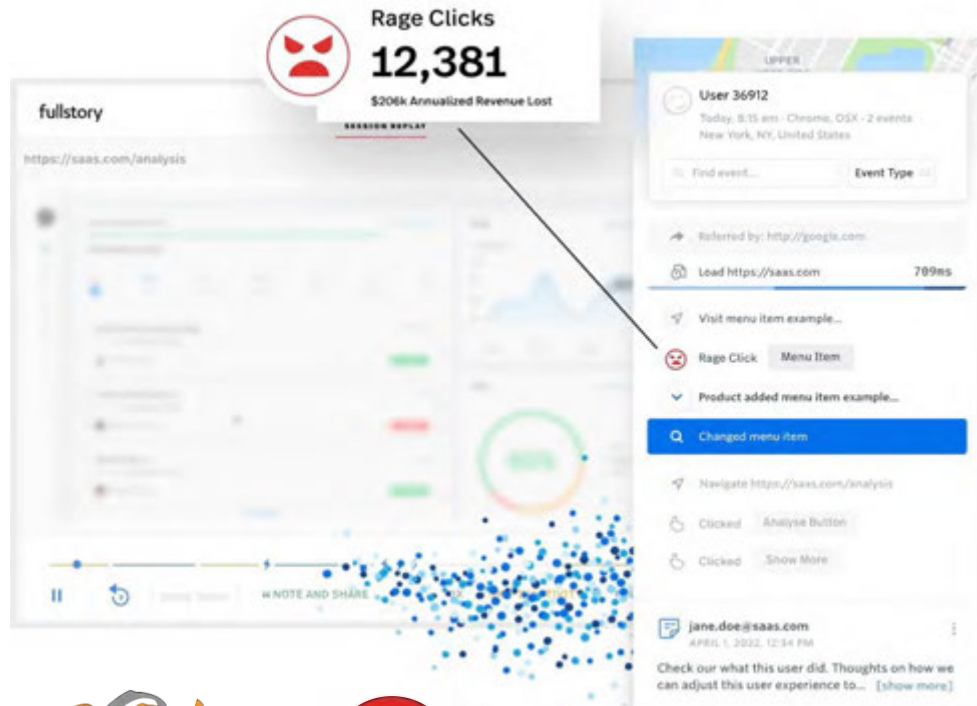


*“We have Limited Resources as we’re migrating away from our Legacy Tech Stack”*



# fullstory

## The Leading Digital Experience Platform



priceline®

TRAVELPORT

eDreams

FLIGHT CENTRE™

Gatwick AIRPORT

jetBlue

GOL  
Linhas aéreas inteligentes



ICELANDAIR

KIWI • COM

spirit®

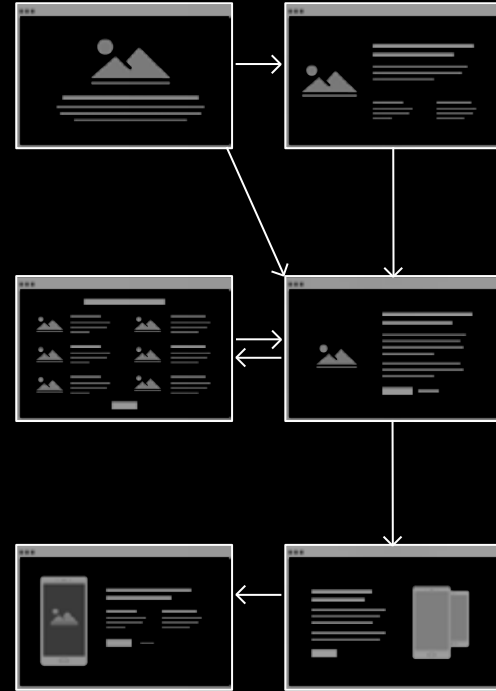
AEROMEXICO

Azul  
Linhas Aéreas Brasileiras

# How do you get visibility into what you're missing?

Traditional analytics only measure the path you think users will take. But they miss the actions you can't predict.

To see what's broken — any why— each team that is responsible for the customer's digital journey needs the **complete picture**.



## Traditional Analytics:

- You only see what you tag
- Huge Engineering overhead
- Only a small spotlight on the issue



...importantly - with a little bit of...  
...what are you waiting for?

holiday destination \*

returning date dd/mm/yy \*

How many travellers? \*

What are your holiday plans:

What do you have any other requests?

YOUR

We know our stuff when it comes to holidays all around the world. With a wealth of information, our Travel Experts can tailor make a trip to suit you.

Where are you departing from? \* 

Where are you departing from? \*

London Heathrow

London Gatwick

Aberdeen

Belfast

Birmingham

To get a better quote, tell us a bit more about you

What's your travel style, what things do you want to see?

You

Return

How

<https://www.flightcentre.co.uk/get-a-quote>

1440 x 789

DEV TOOLS

View in FullStory



## YOUR HOLIDAY

We know our stuff when it comes to holidays all around the world and – most importantly – with a little bit of information, our Travel Experts can tailor make a trip to suit you. So what are you waiting for?

Where are you departing from? \*

Where are you departing from? \*

London Heathrow

London Gatwick

Aberdeen

Belfast

Birmingham

Your holiday destination \*

Returning date dd/mm/yy \*

How many travellers? \*

To get a better quote, tell us a bit more about your holiday plans:

What's your travel style, what things do you want to see and do, do you have any other requests?

(No name available)  
Today, 3:31 PM

Filter events

Event types

Referred by: <https://www.flightcentre.co.uk/>

FS.setUserVars

FS.setUserVars

Refresh <https://www.flightcentre.co.uk/get-a->

Clicked #edit-travel-details--2 div.fieldset-wr

Changed ("London Heathrow"): #edit-departn

Clicked html.js body.bootstrap-wrapper.html.r

Changed ("chi"): html.js body.bootstrap-wrapp

Changed ("Chicago"): #edit-destname

Clicked #departdate

Clicked #ui-datepicker-div div.ui-datepicker-g

Changed ("12/04/2023"): #departdate

Changed ("15/04/2023"): #returndate

Clicked #select2-edit-flight-class-container



0:03 / 0:23

## Case Study

# FLIGHT CENTRE™

*FullStory was integral for improving products in our retail ecosystem with a lean team—it allowed us to uncover the 'unknown unknowns' and prioritize which actions to take.*

Hans Einner Barroga - Design Experience

**22%**

Decrease in booking fail rate

**24%**

Increase in usage of key feature releases

**5**

Flight Centre teams using FullStory



# jetBlue

*“We used FullStory to bubble up similarities between different customer groups, identify common criteria, and establish what sort of error messages were occurring frequently”.*

Jillian Moroney - Head of Product

**20%**

Decrease in  
payment errors

**50%**

Reduction in time to  
insight

**22%**

Error validation on  
checkout funnel





<https://www.jetblue.com/booking/trip-summary>

1440 x 789

DEV TOOLS

View in FullStory

The screenshot shows the JetBlue website interface. At the top, the JetBlue logo is visible on the left, and navigation links for "LOW FARE", "Apr 4 - Apr 9", and "1 Traveler" are in the center. On the right, there are "Sign in" and a shopping cart icon. The main content area features a dark blue header with "Flights" and "Hotel" options, and a central "Explore packages" button. A white error modal is centered on the screen with the text: "Oops! Looks like something went wrong when loading your selected flights. Please try again." Below the modal, there are icons for "Flights" and "Hotel". At the bottom of the page, there is a "Popular Help Topics" section with links for "Our Fares", "Baggage", "Travel Credits", and "Search Help Topics". A footer contains "Privacy Policy", "Submit Feedback", and "© 2024 JetBlue Airways Corp."

(No name available)

Today, 12:10 PM

Filter events

Event types 22

Track Campaign

Clicked #auto-flight-quickest-or-lowest-o div.s

Clicked #auto-flight-cardo-jb-expandable-cont

Clicked #auto-flight-quickest-or-lowest-s div.c

Clicked #auto-flight-cards-jb-expandable-cont

Clicked html.asappChatSDKHostHTML.asappi

Navigate https://www.jetblue.com/booking/tr

Track Campaign campaign\_str: Camp-Deepin

Clicked html.asappChatSDKHostHTML.asapp



0:41 / 0:46

1x

Powered by fullstory







Media: https://www.jetblue.com/booking/tr

# Conversions

## Proactively identify opportunities to improve Ancillary Product Sales - through Conversions

Using FullStory's Conversions feature, get visibility to proactively surface which points of friction correlate with funnel dropout and lost revenue on key ancillary product funnels

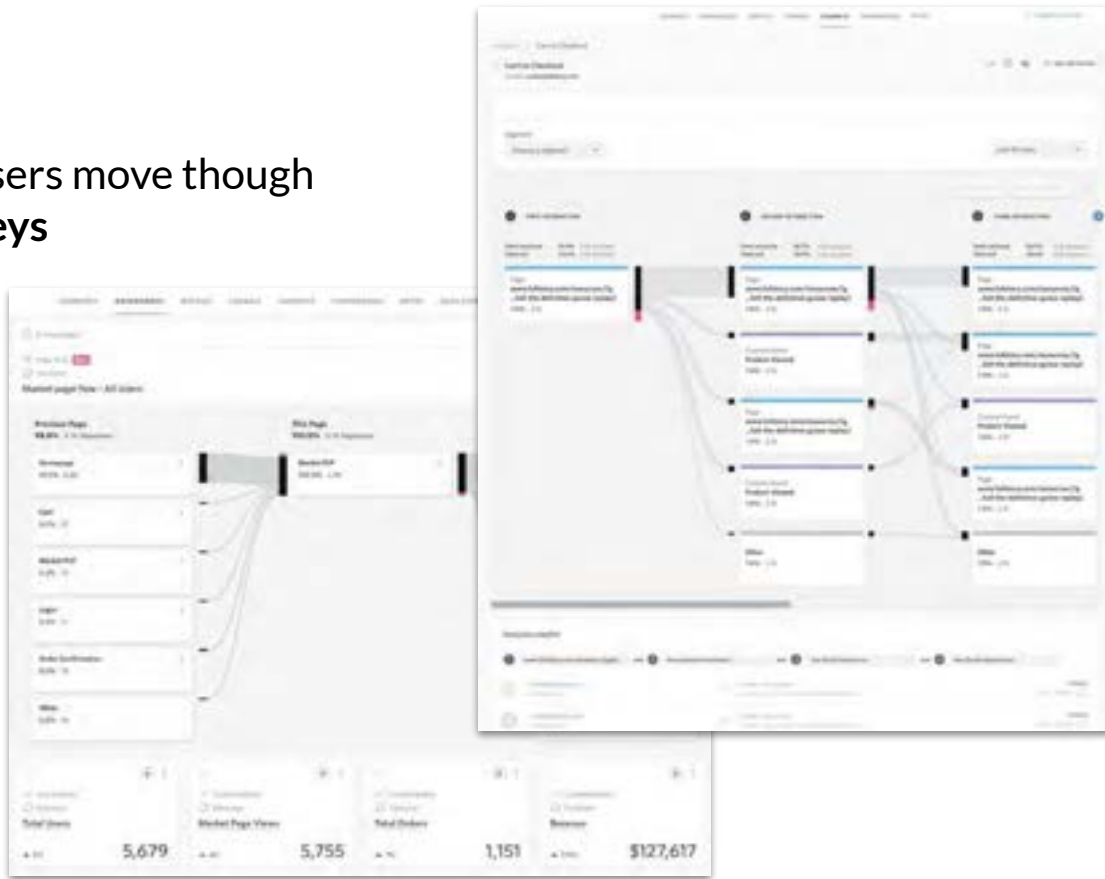
Also prioritise which issues to fix first based on revenue loss.

Opportunities to improve Funnel				
Signals	Lost Conversions	Annualized Revenue	Affected Users	Conversion Impact
 <b>Custom Event</b> Javascript error • Message • "Missing Field"	2,895	\$313k	4,626	-74.27%
 <b>Page Load Performance • 6+ seconds</b> /cart	1,454	\$157k	13,174	-23.19%
 <b>Error Click</b> Please enter your mobile phone number	1,069	\$115k	1,984	-86.42%
 <b>Dead Click</b> Update your shipping address	1,048	\$113k	2,009	-83.72%
 <b>Rage Click</b> Place Order	867	\$94k	19,515	-7.22%
 <b>Watched Element</b> .errorDialog • "203AKX0"	635	\$69k	10,068	-2.48%

# Journey Mapping

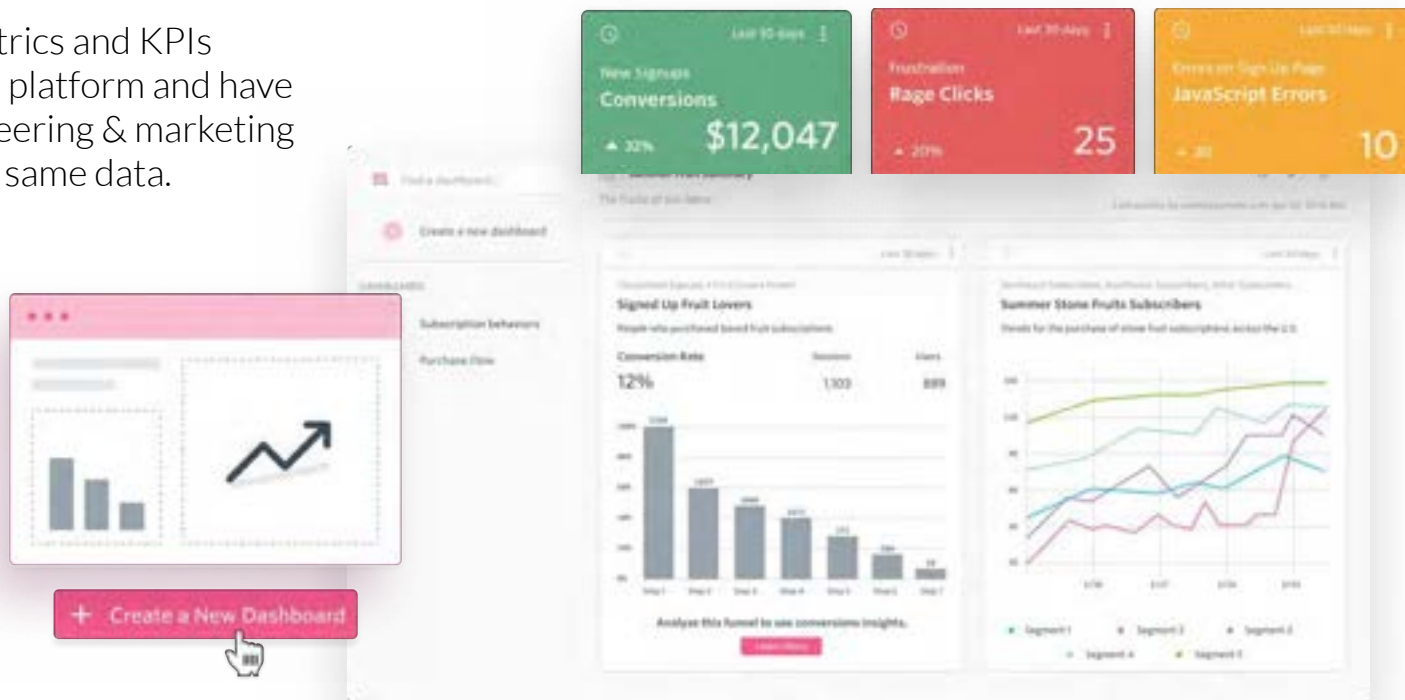
Know the where, when, and how users move through your digital property - using **Journeys**

Journeys give understanding into how users navigate your website, mobile application, and kiosk, giving you the ability to spot opportunities for optimisation



# Dashboards

Bring all of key metrics and KPIs together in a single platform and have product, UX, engineering & marketing teams work off the same data.

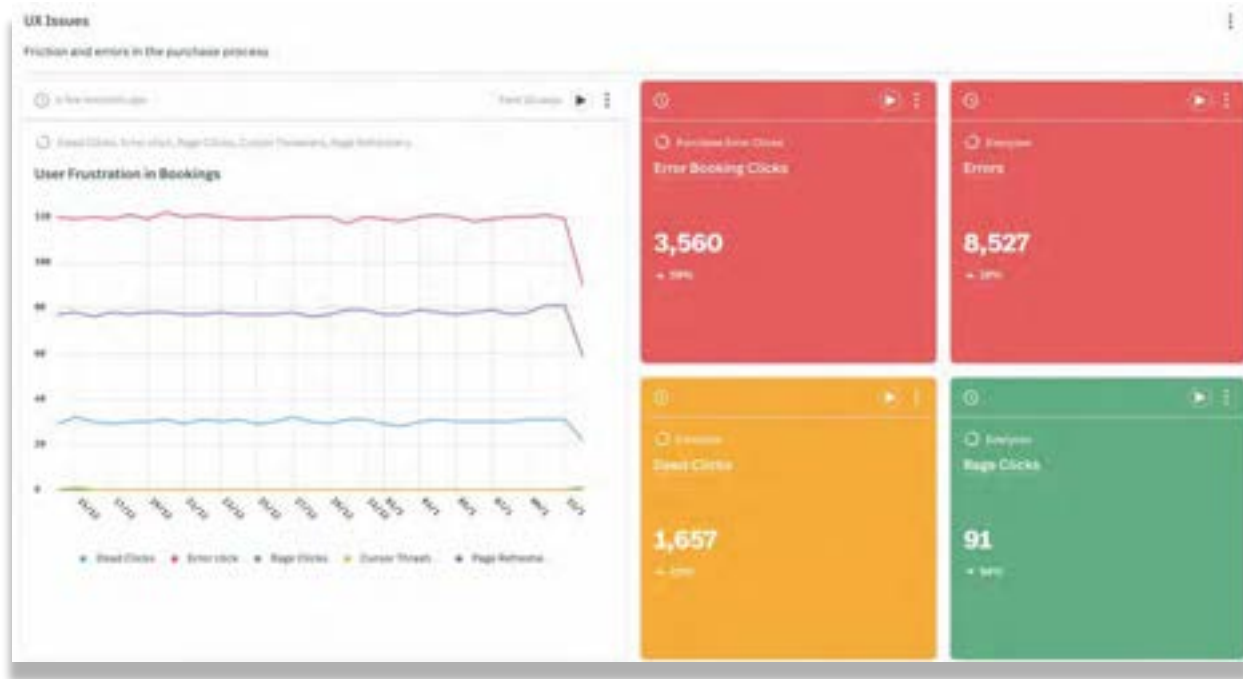


# Frustration Metrics

Be proactive in your approach to solving problems, by leveraging 'out-of-the-box signals'

Surface customer friction with FullStory's 'out-of-the-box' frustration signals.

Use frustration signals to get insight into customer frustration and context behind users who leave your platform without completing their desired task.



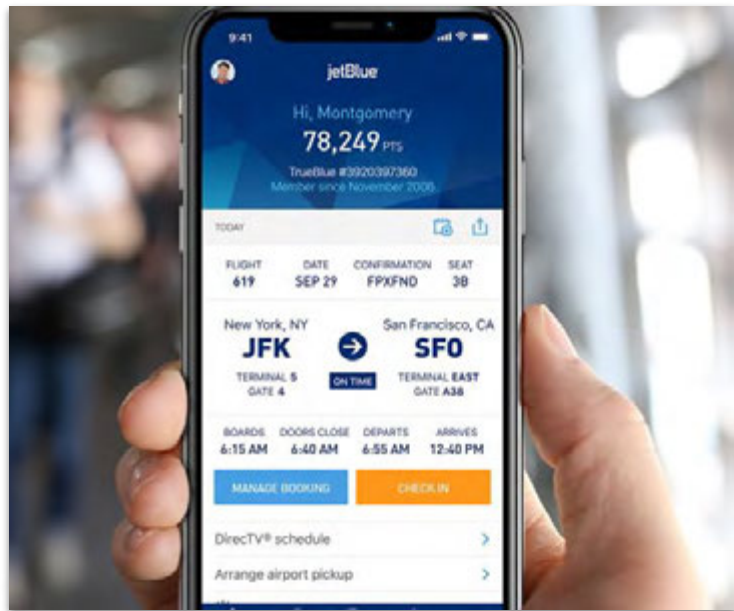
# FullStory for Mobile

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Understand the 'full picture' for users on mobile and at self-service kiosks

Using FullStory for mobile, you can gain insights into bugs and issues that are causing users to leave poor reviews on the App Store & Google Play Store.

Airlines can also use this as an opportunity to improve personalisation by understanding full customer journey.

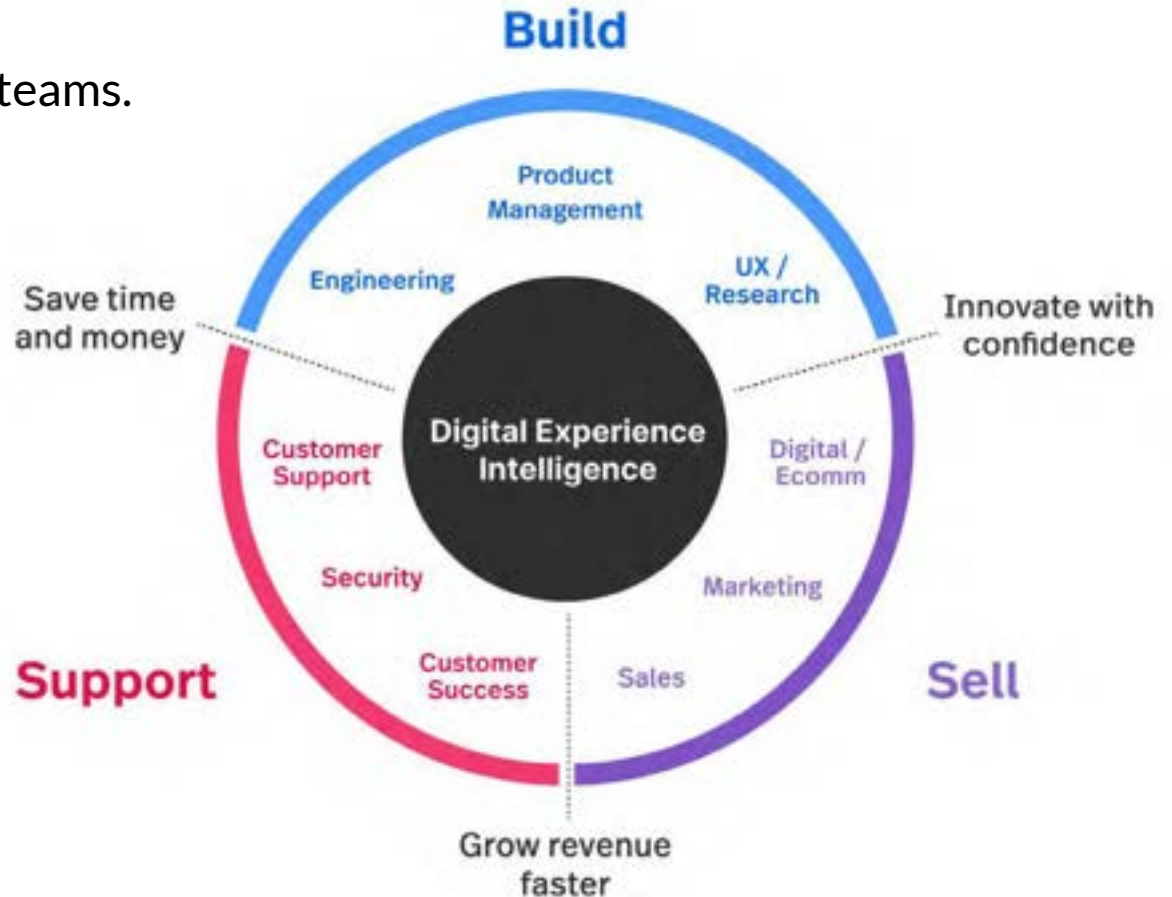


# Who are we serving?

We design and build for your teams.

Build better customer experiences, together.

---



# Thank You!

---

**Name:** Charles Addai-Appiah  
**Role:** Regional VP  
**Email:** [Charlie@fullstory.com](mailto:Charlie@fullstory.com)  
**Number:** 07724434421

**Name:** Kofi Ankomah  
**Role:** Strategic Accounts  
**Email:** [Kofi@fullstory.com](mailto:Kofi@fullstory.com)  
**Number:** 07533572423



Learn More About  
FullStory here!



**fullstory**



# fever

Innovation Day @ IATA  
*June 2023*

CONFIDENTIAL



**Ollie Killick**  
*Global Head of Brand Partnerships*  
**Fever**

**Fever is an ecosystem with multiple ways for an airline to plug in to...**

**To add value to trip bookings, increase loyalty usage and to make trips unforgettable**

# STRANGER THINGS



NETFLIX

fever

mycotoo

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# STRANGER -THINGS



**Nostalgia, friendship, and supernatural adventure.**

NETFLIX fever



**Making YOU the hero of the story.**

**NETFLIX** fever





**The Mixtape Area.**



# GLOBAL ROLLOUT SO FAR

## CLOSED

### NYC

 164k Tickets Sold  
 4.8 Average Rating

### SAN FRANCISCO

 128k Tickets Sold  
 4.8 Average Rating

### LOS ANGELES



 98k Tickets Sold  
 4.8 Average Rating

### ATLANTA



 103k Tickets Sold  
 4.7 Average Rating

## LIVE



### PARIS

 114k Tickets Sold  
 4.3 Average Rating

### TORONTO

 95k Tickets Sold  
 4.3 Average Rating

### SEATTLE

 61k Tickets Sold  
 4.3 Average Rating

## COMING SOON

### WASHINGTON DC

# NYC IMPACT REPORT

## SOCIAL MEDIA METRICS:

- Accounts: Stranger Things: The Experience + Secret NYC + Fever
- Platforms: Facebook, Instagram, Google, Youtube, TikTok & Fever Marketplace
- Main location: NY/NJ Metropolitan Area

**+58M**

IMPRESSIONS

**+3.3M**

ENGAGEMENTS

**+1.3M**

CLICKS

**+10M**

UNIQUE READERS

**396K**

SHARES & COMMENTS

**800K**

LANDING PAGE VIEWS

PRESENTED BY

**NETFLIX** **fever**

**TOTAL IMPRESSIONS NYC**

**61.6M+**

USER GENERATED CONTENT  
PRESS  
SOCIAL MEDIA (ST EXPERIENCE, SECRET NYC, FEVER)

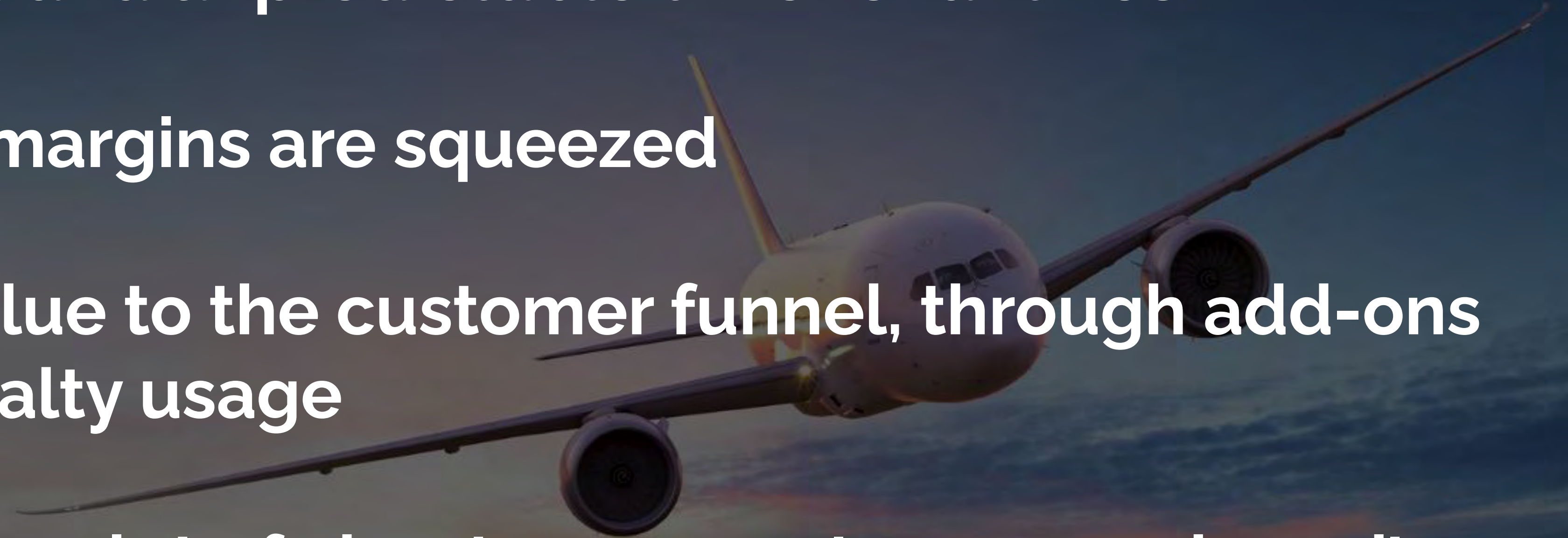
WHAT WE'VE LEARNT ABOUT AIRLINES THROUGH ACCELERATE@IATA PROGRAMME

**It's been a difficult and unpredictable time for airlines**

**Core flight ticket margins are squeezed**

**Looking to add value to the customer funnel, through add-ons and increased loyalty usage**

**Airlines don't know a lot of about some customers and aren't using all of the data they have on others... but they do want to increase personalization**



A couple in formal attire is dancing in the center of a ballroom. The room is decorated with blue curtains, a large chandelier, and spotlights. Other guests are visible in the background, some dancing and some watching. The overall atmosphere is elegant and festive.

FEVER'S MISSION

**Democratize access to incredible  
live entertainment**

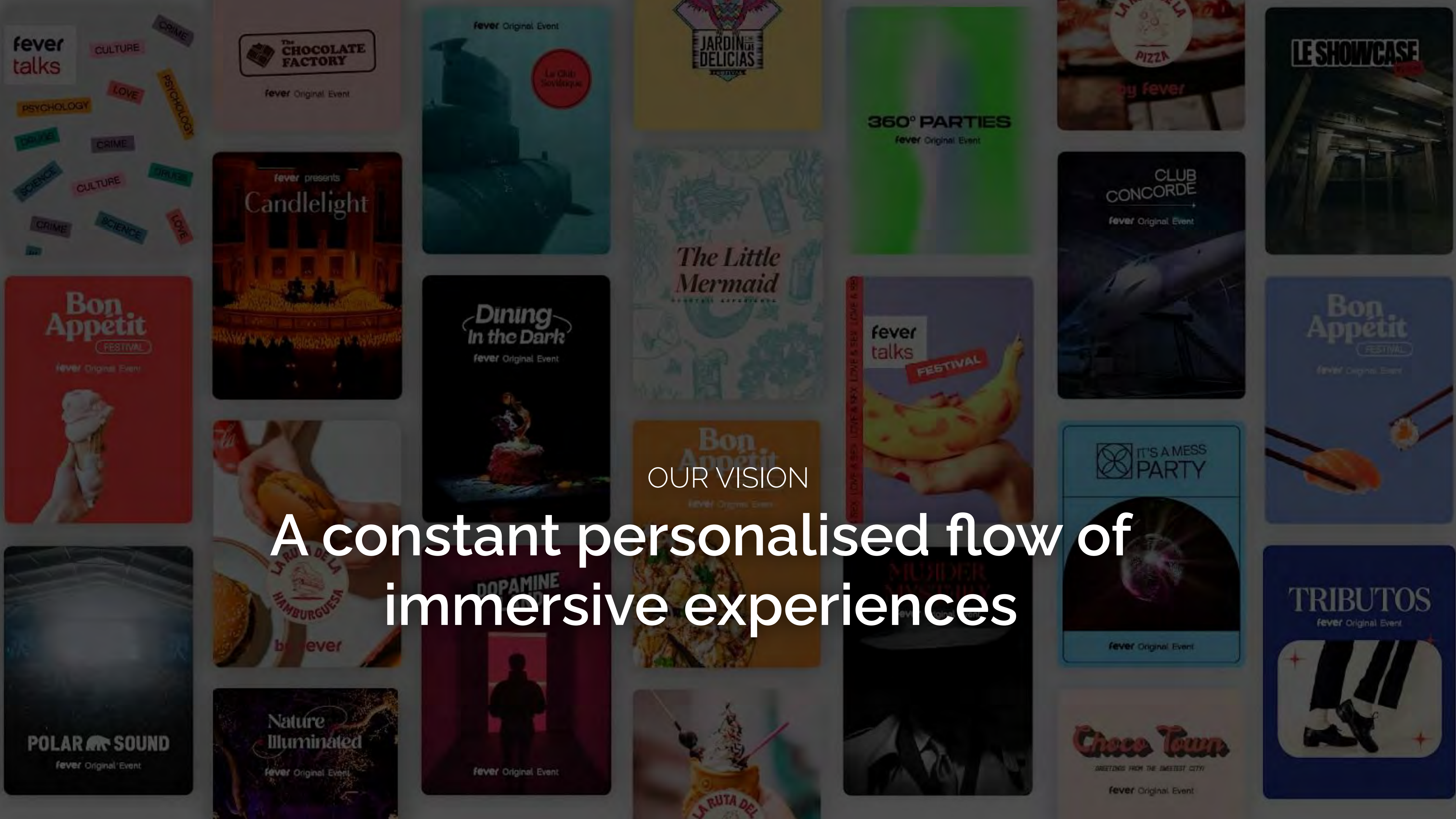


OUR BELIEF

**Utilizing technology and data leads to a better understanding of consumers, and therefore better experiences**

OUR VISION

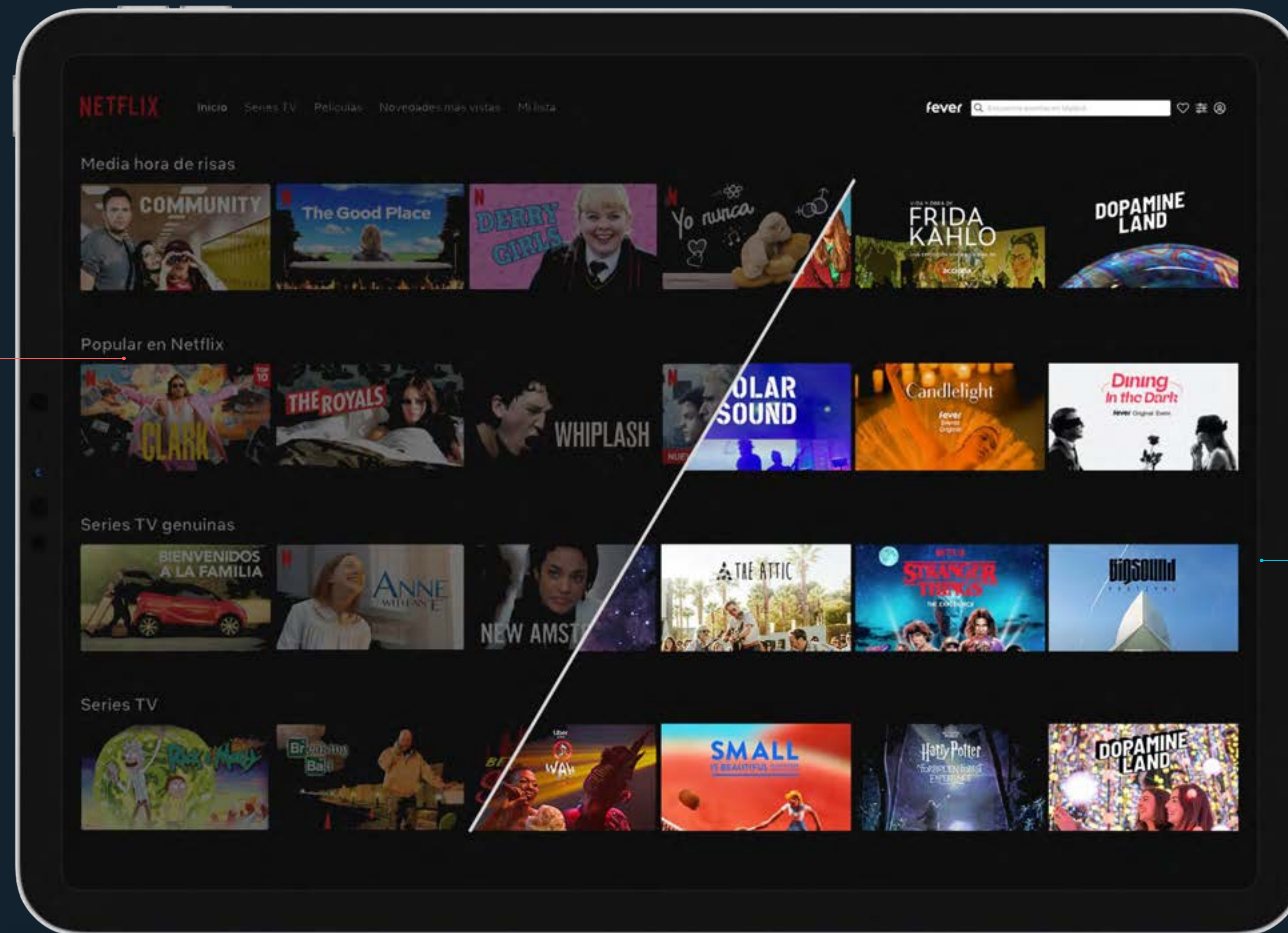
# A constant personalised flow of immersive experiences



# An unparalleled way to serve fans globally... Like Netflix, for live Experiences

**NETFLIX**

Data-driven  
audiovisual content  
creation.



**fever**

Data-driven  
experiential content  
curation & creation.

# The **World's Largest** source of curated multcategory experiences



+ 500 exhibitions



+ 500 sports



+500 wellness



+ 2.000 tasting



+2.000 music



+ 1.000 cinema



+1.000 nightlife



+ 500 theater



# Platform already available in **over 150 major travel hub cities**



# Agreements with the world's leading experience providers, access to more than 40,000 events



Not exhaustive

Confidential and Proprietary

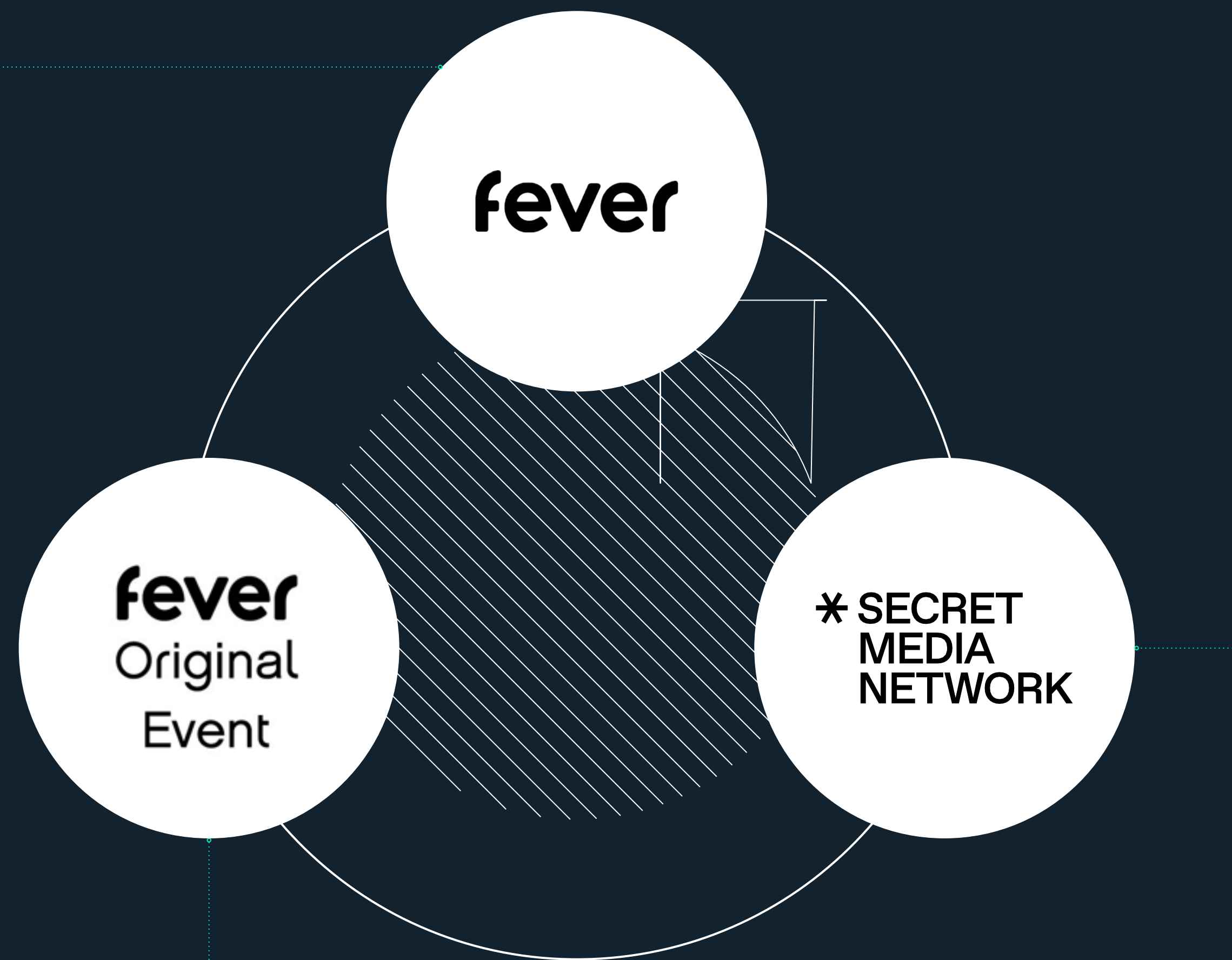
**Unique Tech  
Enabled ecosystem  
powering events  
worldwide**

**Fulfilling customer  
journey from  
inspiration to  
conversion to  
experience**

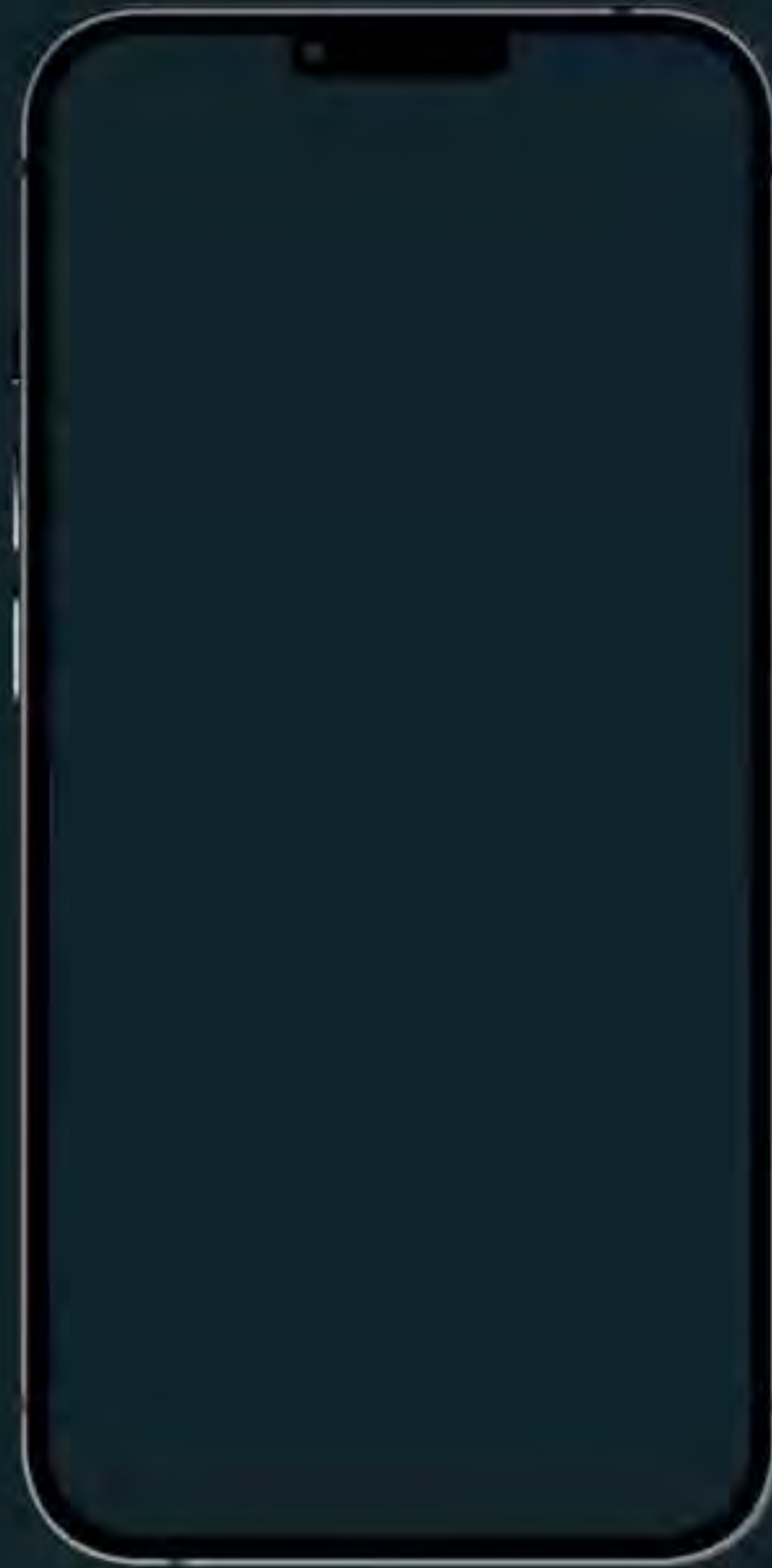
Experience  
Marketplace,  
volume of 30M  
tickets per year

Fever Original  
Experiences, tapping  
into data from  
120,000 concepts

Hyper-local  
Media Network,  
reaching 212M  
people



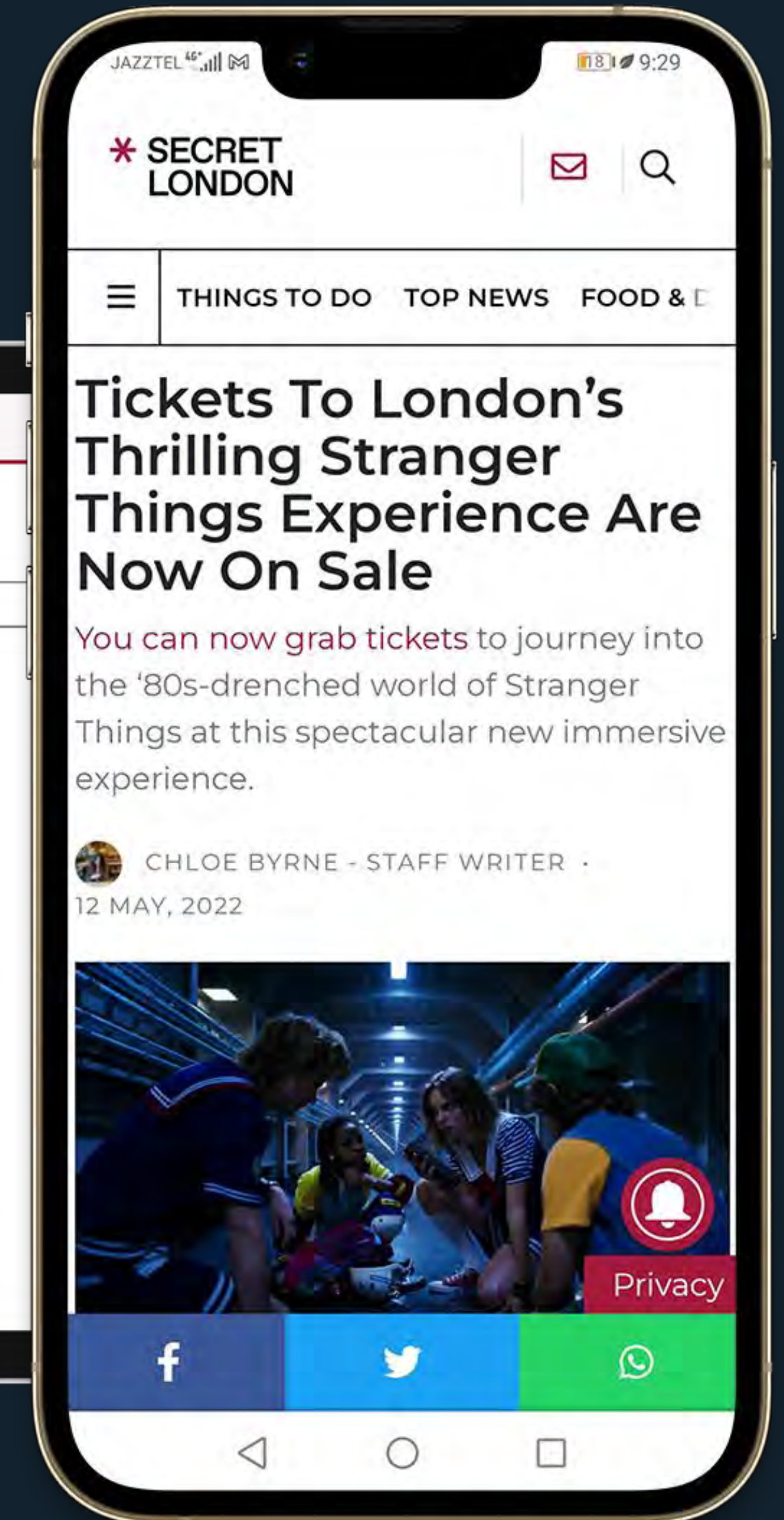
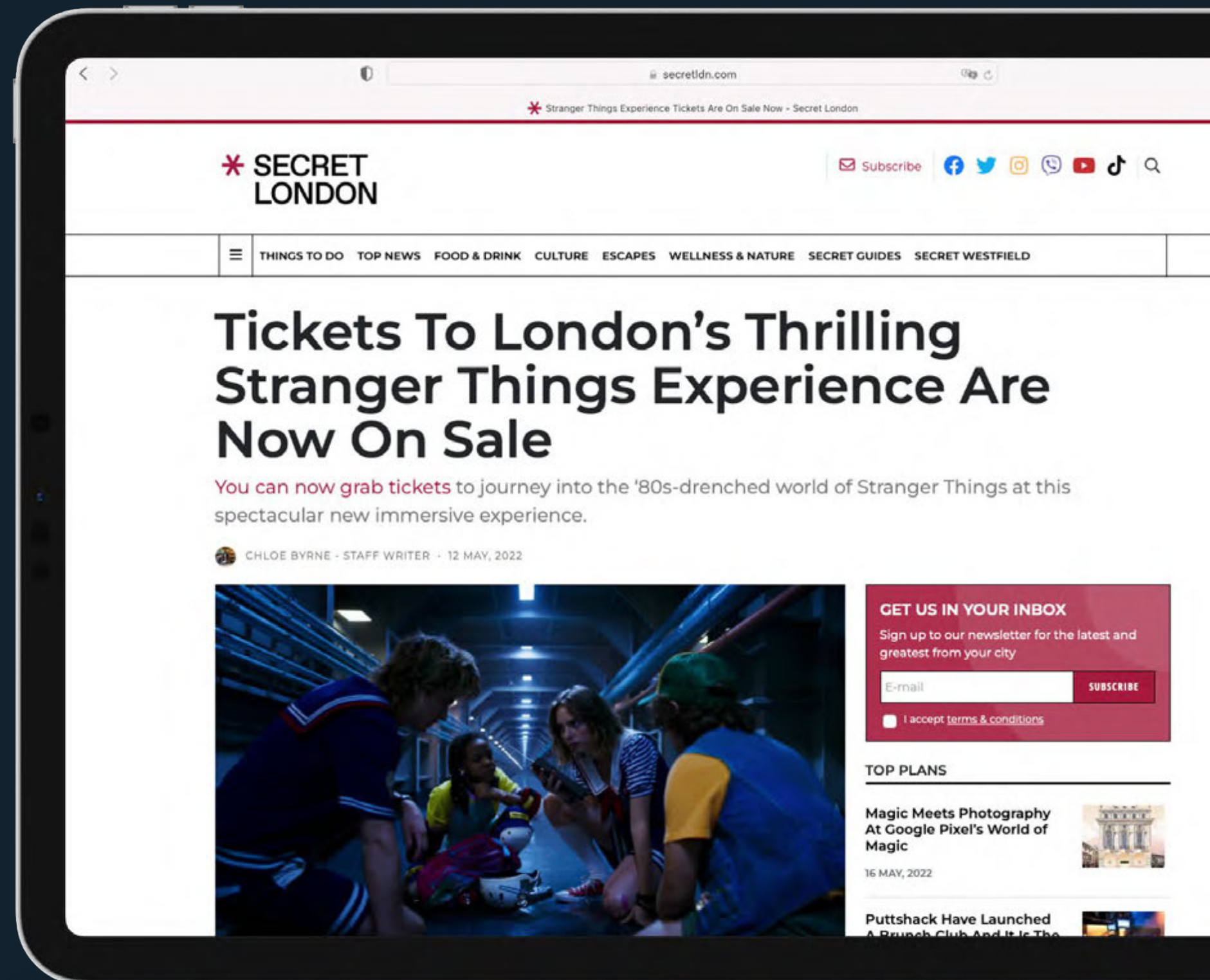
# Marketplace



# Secret Media Network

Largest network of local entertainment media

*Travel a key vertical*



# Covering the best of Culture and Entertainment in the World's top Cities



## Europe cities:

- \* MADRID SECRETO
- \* BARCELONA SECRETA
- \* BILBAO SECRETO
- \* SEVILLA SECRETA
- \* MÁLAGA SECRETA
- \* VALENCIA SECRETA
- \* SECRET IBIZA
- \* TORINO SEGRETA
- \* SECRET ROMA
- \* SECRET NAPOLI
- \* SECRET MILANO
- \* SECRET STUTTGART
- \* SECRET MÜNCHEN
- \* SECRET HAMBURG
- \* SECRET KÖLN
- \* SECRET FRANKFURT
- \* SECRET BERLIN
- \* SECRET ZÜRICH
- \* LISBOA SECRETA
- \* SECRET WIEN
- \* PORTO SECRETO
- \* BRUXELLES SECRÈTE
- \* GENÈVE SECRÈTE
- \* BORDEAUX SECRET
- \* LILLE SECRET
- \* LYON SECRET
- \* MARSEILLE SECRÈTE
- \* NICE SECRET
- \* PARIS SECRET
- \* TOULOUSE SECRET

\* SECRET KØBENHAVN

\* SECRET BIRMINGHAM

\* SECRET BRISTOL

\* LEEDS UNCOVERED

\* SECRET MANCHESTER

\* SECRET LONDON

\* LEEDS UNCOVERED

\* SECRET GLASGOW

\* SECRET DUBLIN

\* SECRET LIVERPOOL

\* SECRET STOCKHOLM

\* SECRET AMSTERDAM

\* SECRET TAMPA

\* SECRET TUCSON

\* SECRET ST LOUIS

\* SECRET SEATTLE

\* SECRET AUSTIN

\* SECRET SAN FRANCISCO

\* SECRET SAN DIEGO

\* SECRET RALEIGH

\* SECRET PHOENIX

\* SECRET PHILADELPHIA

\* SECRET PORTLAND

\* SECRET ORLANDO

\* SECRET OMAHA

\* SECRET NOLA

\* SECRET NYC

\* SECRET NASHVILLE

\* SECRET MINNEAPOLIS

\* SECRET MIAMI

\* SECRET MEMPHIS

\* SECRET LAS VEGAS

\* SECRET LOS ANGELES

\* SECRET KC

\* SECRET HOUSTON

\* SECRET GRAND RAPIDS

\* SECRET DETROIT

\* SECRET DENVER

\* SECRET DC

\* SECRET DALLAS

\* SECRET CLEVELAND

\* CINCINNATI UNCOVERED

\* RIO DE JANEIRO SECRETO

\* TOLUCA SECRETA

\* TIJUANA SECRETA

\* GUADALAJARA SECRETA



## Asia & Oceania cities:

\* SECRET AUCKLAND

\* SECRET SYDNEY

\* SECRET PERTH

\* SECRET MELBOURNE

\* SECRET GOLD COAST

\* SÃO PAULO SECRETO

\* RIVIERA MAYA SECRETA

\* MONTERREY SECRETO

\* CDMX SECRETA

\* SECRET ADELAIDE

\* SECRET SINGAPORE

\* SECRET WELLINGTON

\* SECRET CHRISTCHURCH

\* SECRET BRISBANE



## American cities:

\* SECRET CALGARY

\* MONTRÉAL SECRET

\* QUÉBEC SECRET

\* SECRET VANCOUVER

\* SECRET ATLANTA

\* BOSTON UNCOVERED

\* SECRET CHARLOTTE

\* SECRET EDMONTON

\* SECRET OTTAWA

\* SECRET TORONTO

\* SECRET AUSTIN

\* SECRET BALTIMORE

\* SECRET CHARLESTON

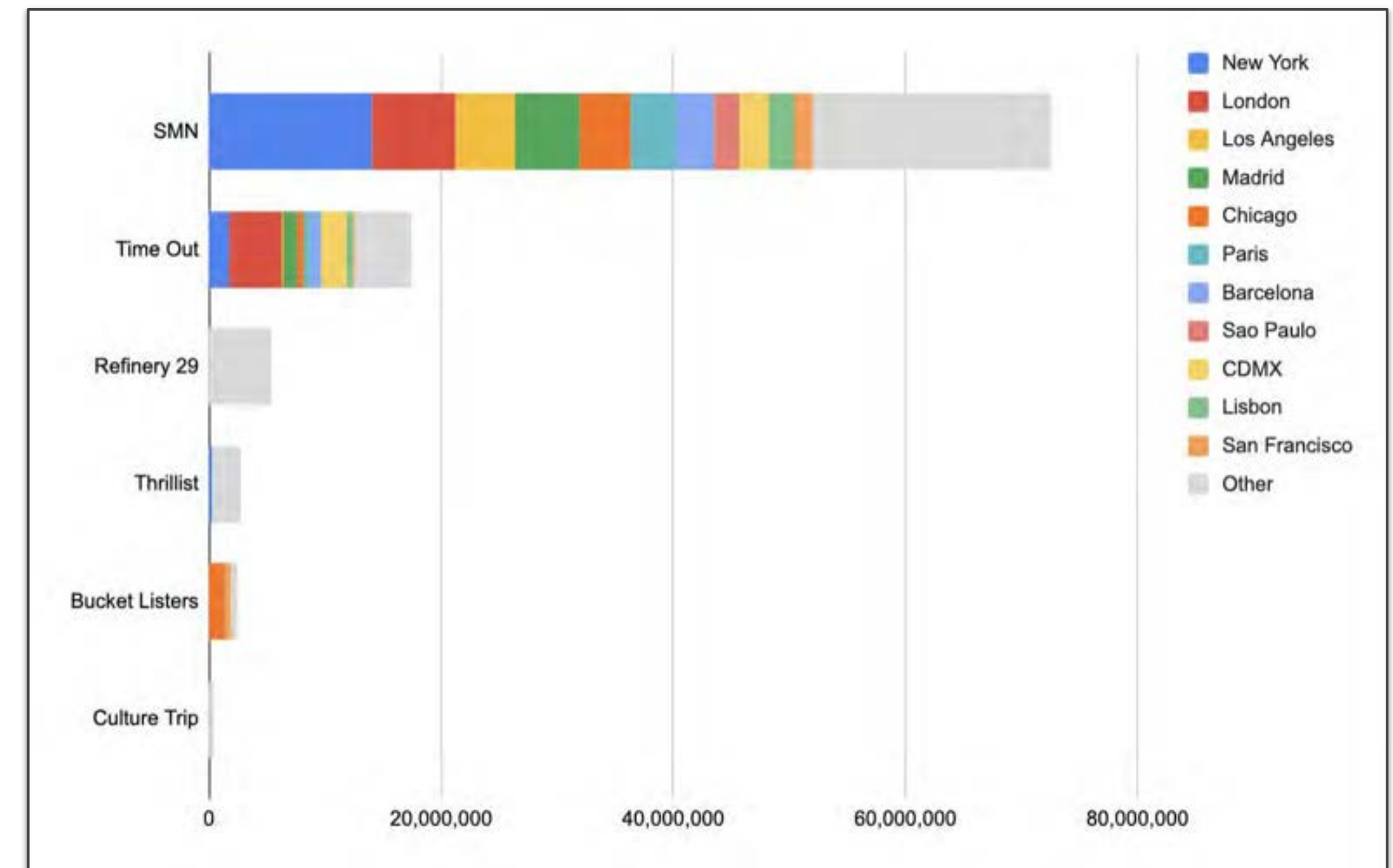
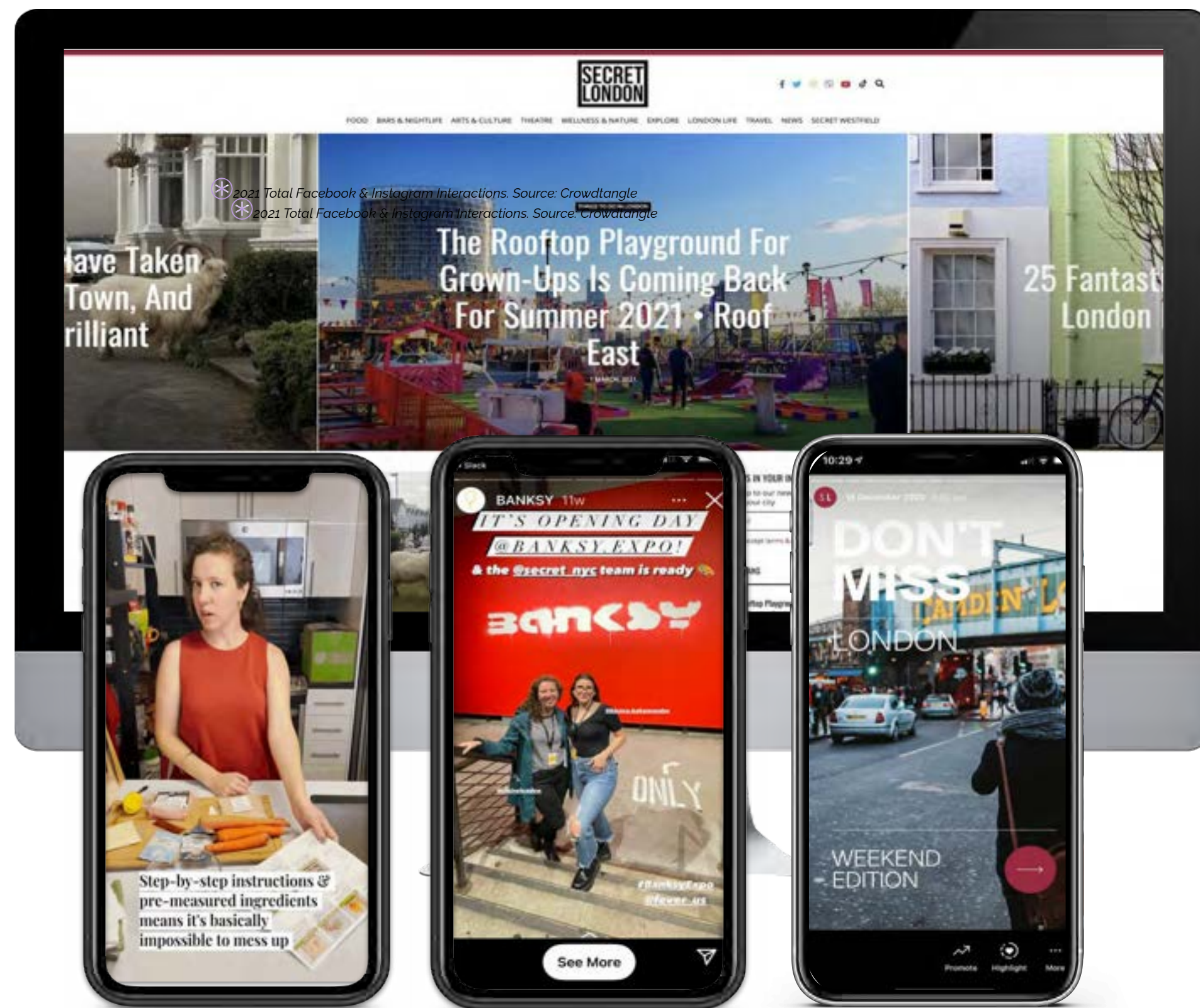
\* SECRET CHICAGO

# Hyper Localized, Social-First, Recommendation Engine



**Hyper localized** and entertaining actionable social formats...

...that drive significant levels of **social engagement** versus other local entertainment media



2022 Total Facebook & Instagram Interactions. Source: Crowdtangle

# Fever & Secret Media Audience

Interested in Culture, Travel and Entertainment



Visual Arts

**789**

INDEX

Visitors to this site are **7.89x** more likely than the average internet user to visit websites in the **Visual Arts** category.



Dining Out

**457**

INDEX

Visitors to SMN sites are **4.57x** more likely than the average internet user to visit websites in the **Dining Out** category.



Travel

**423**

INDEX

Visitors to SMN sites are **4.23x** more likely than the average internet user to visit websites in the **Travel & Adventure** category.



Music

**246**

INDEX

Visitors to this site are **2.46x** more likely than the average internet user to visit websites in the **Music** category.



Style and Fashion

**166**

INDEX

Visitors to this site are **1.66x** more likely than the average internet user to visit websites in the **Style & Fashion** category.



Health & Fitness

**149**

INDEX

Visitors to this site are **1.49x** more likely than the average internet user to visit websites in the **Health & Fitness** category.



# Example: USA & CAN audience are travellers & explorers

4.23x

more likely than the average internet user to visit websites in the **Travel** category.

3.26x

more likely than the average internet user to visit websites in the **Destinations** category.

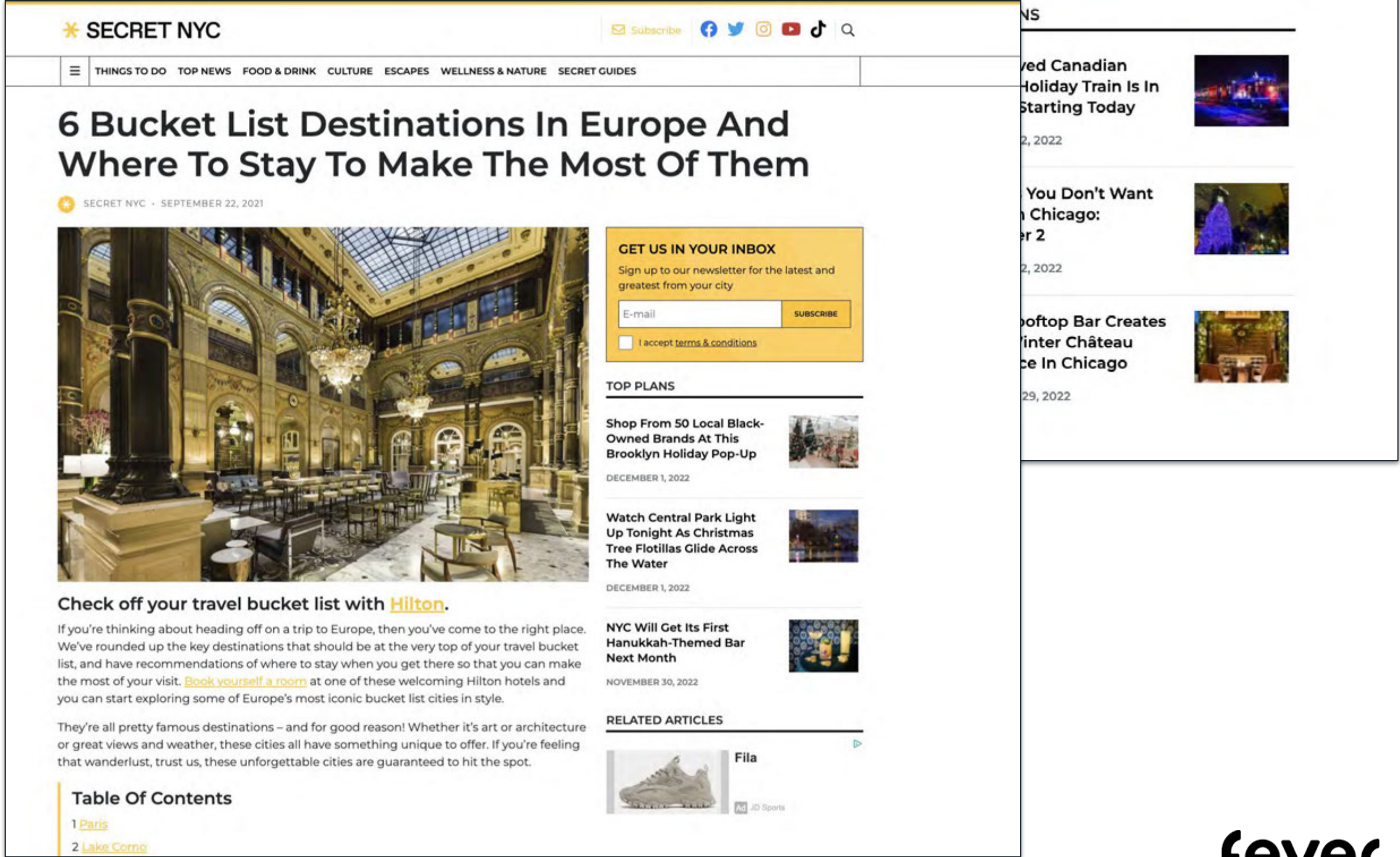
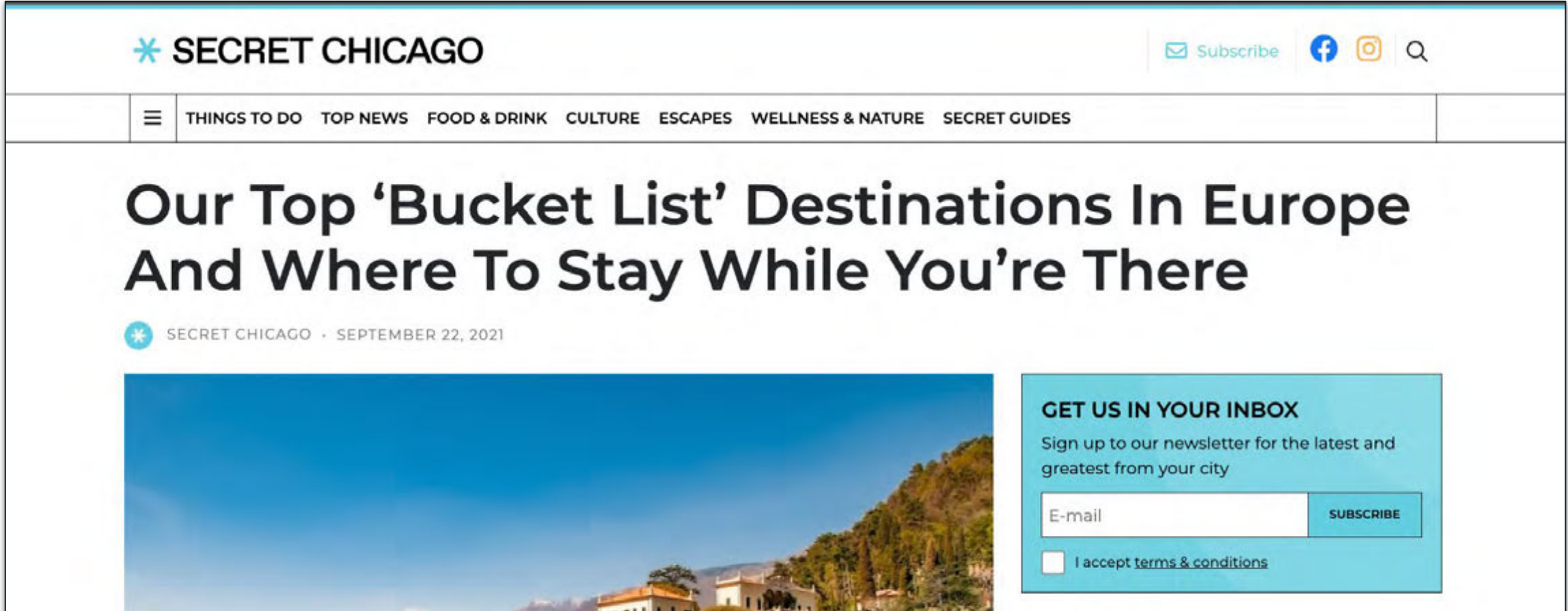
2.02x

more likely than the average internet user to visit websites in the **Air Travel** category.

3.07x

more likely than the average internet user to visit websites in the **Europe Travel** category.

Data Source: Quantcast

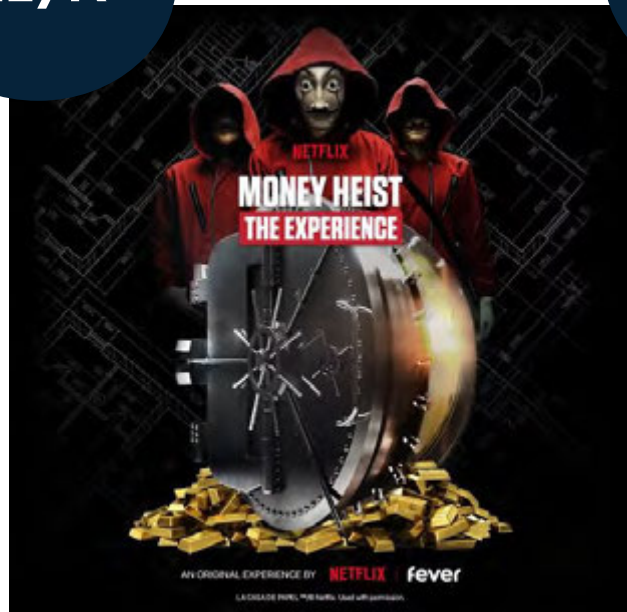


# Fever Original Experiences

Ecosystem Data used to inform the **creation of** new, **unique experiences**



217K



**Money Heist:**  
The Experience

1.2M



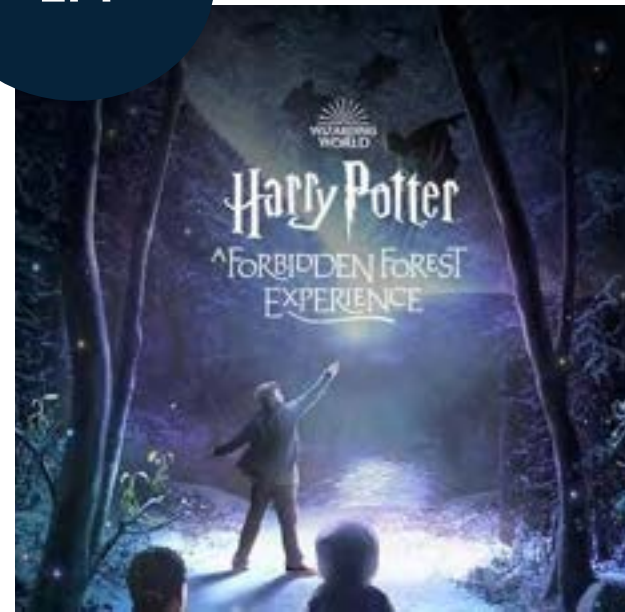
**Stranger Things:**  
The Experience

400k



**Bridgerton Ball:**  
The Experience

1M



**Harry Potter:**  
A Forbidden Forest  
Experience

5M



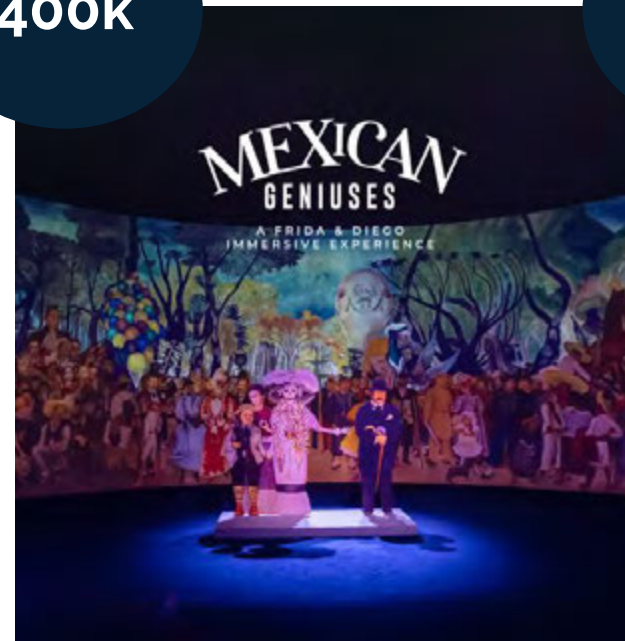
**Van Gogh:**  
The Immersive Experience

300k



**Titanic:**  
The Exhibition

400k



**Mexican Geniuses**  
The Immersive  
Experience

280k



**Jurassic World:**  
The Immersive  
Experience

6M



**Candlelight  
Concerts**

400k



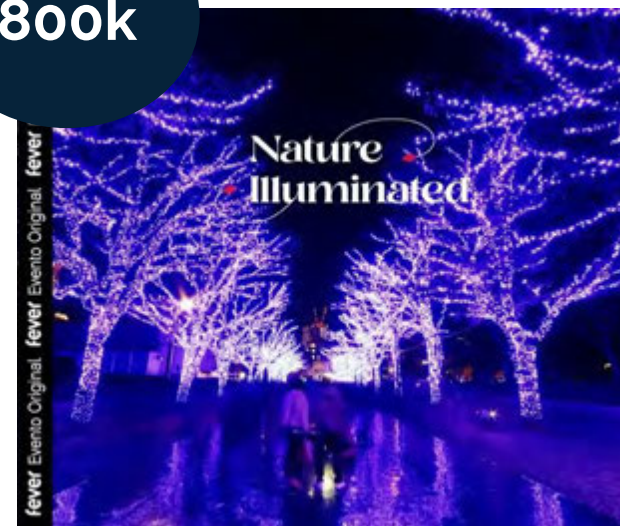
**360s:**  
Gigs

50k



**Music Festivals:**  
Pilots

800k



**Nature Illuminated:**  
Immersive  
Experience

**Global agreements  
with IP owners, means  
Fever has access to  
World-famous IPs**

# Data Driven Approach

## Analysis & Criteria

Analysis Of Event Virality And Ticketing Demand

Unparalleled Data Set Of Over 120,000 Concepts

Event Success Decision Threshold Uses Performance Benchmarks



# Some of our Travel Partnerships



SMN Travel Inspiration  
**Content to drive privilege club sign ups**

**Sponsorship of two Fever Original** experiences



**Multi-year Hyperlocal SMN media campaigns** promoting key Hilton locations in key **international and domestic** feeder cities



Partnerships with **tourism boards** to run engaging SMN campaigns to **provoke wanderlust** in our audience

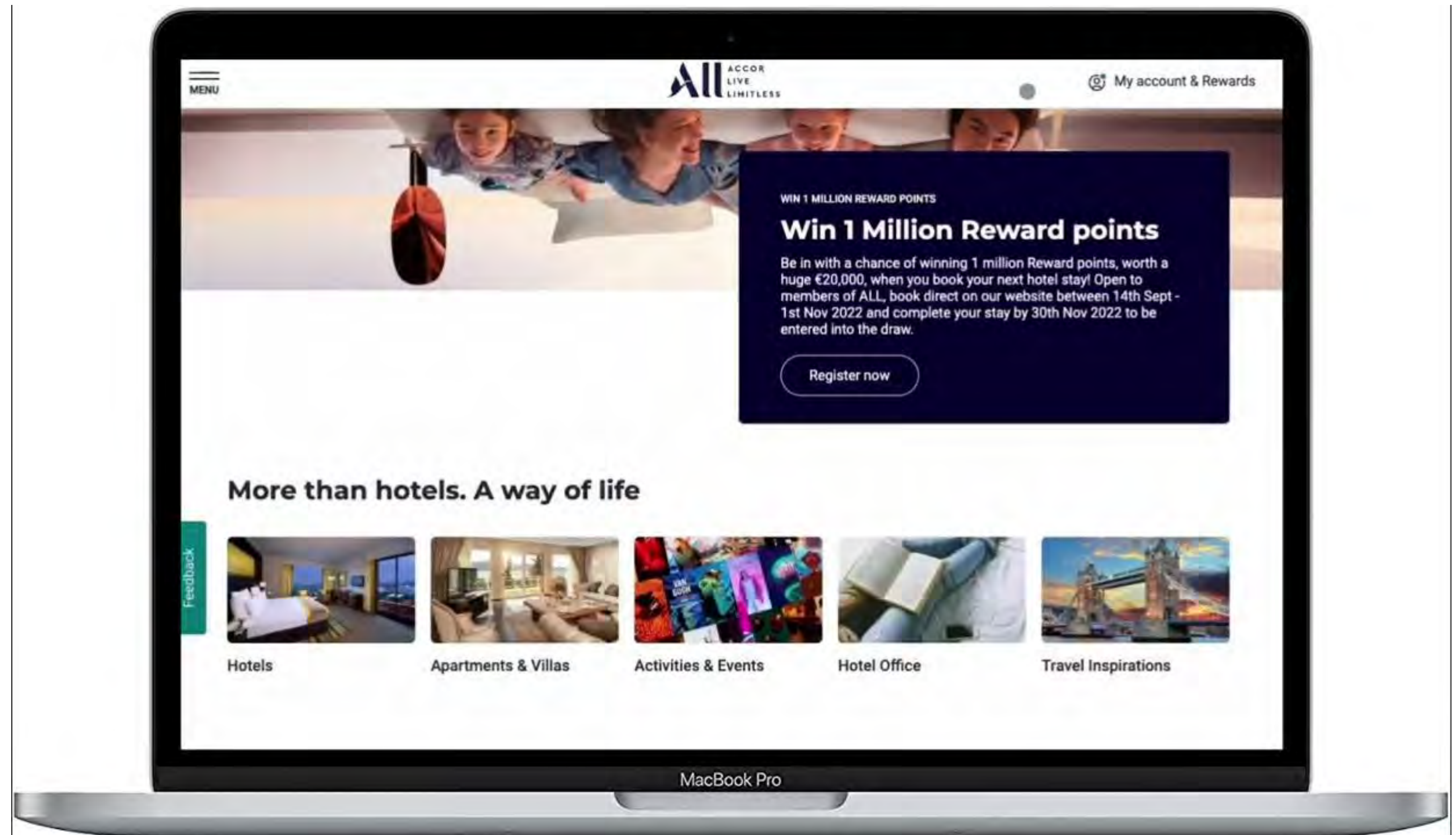


**Local travel inspiration** through native city centric content crafted to promote travel along the SWR railway in and around London

# Fever developing Global white label ticketing solutions for partners in Travel



API integration with core  
Fever experiences available  
to buy on the Accor Live  
Limitless platform



The background features a large, semi-transparent watermark of the FeverUp logo, which consists of the word "feverup" in a lowercase, rounded, sans-serif font. The letters are a dark blue color, matching the background. The word is centered horizontally and vertically on the slide.

# Thank You

OLLIE KILLICK  
Global Head of Brand Partnerships  
[ollie.killick@feverup.com](mailto:ollie.killick@feverup.com)  
+44 797 118 7948  
[www.feverup.com](http://www.feverup.com)

# fewer **NETFLIX**

Immersing Fans in the Worlds of Critically Acclaimed Shows





# Fever Global Partners



PORSCHE



HUAWEI

Westfield

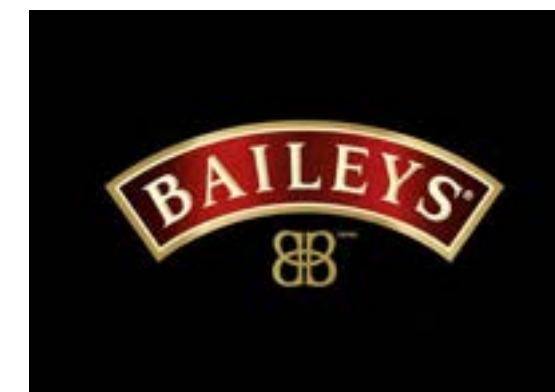


San Miguel



JOHNNIE WALKER.

COTY  
BEAUTY, LIBERATED



fever



# From A/B to AI

IATA Focus Week - Intro to OfferFit



# We are in the middle of an AI revolution

## Trend #1

Passengers demand personalization: only targeted, relevant marketing wins

## Trend #2

Airlines are unifying their data at the customer level



## The Gap

How can Airlines turn their data into intelligent, personalized decisions for each passenger?

Are you making customer level decisions?

What is holding you back?



OfferFit's **Automated Experimentation Platform** is the fastest, most scalable way to accelerate testing and learning.

Automatically discover the right message, creative, incentive, channel, and timing for every customer to unlock the full value of your customer data.



# Our customers come from a wide range of industries



## Banking

Maximizing credit card referrals.

**92%**

Uplift in conversion rate



## Services

Maximizing customer value via contract renewals.

**200%**

Uplift in customer CLV



## Restaurants

Maximizing repeat visits by new customers.

**10%**

Uplift in purchase rate



## Telco

Maximizing upsell & cross-sell.

**120%**

Uplift in incremental ARPU impact



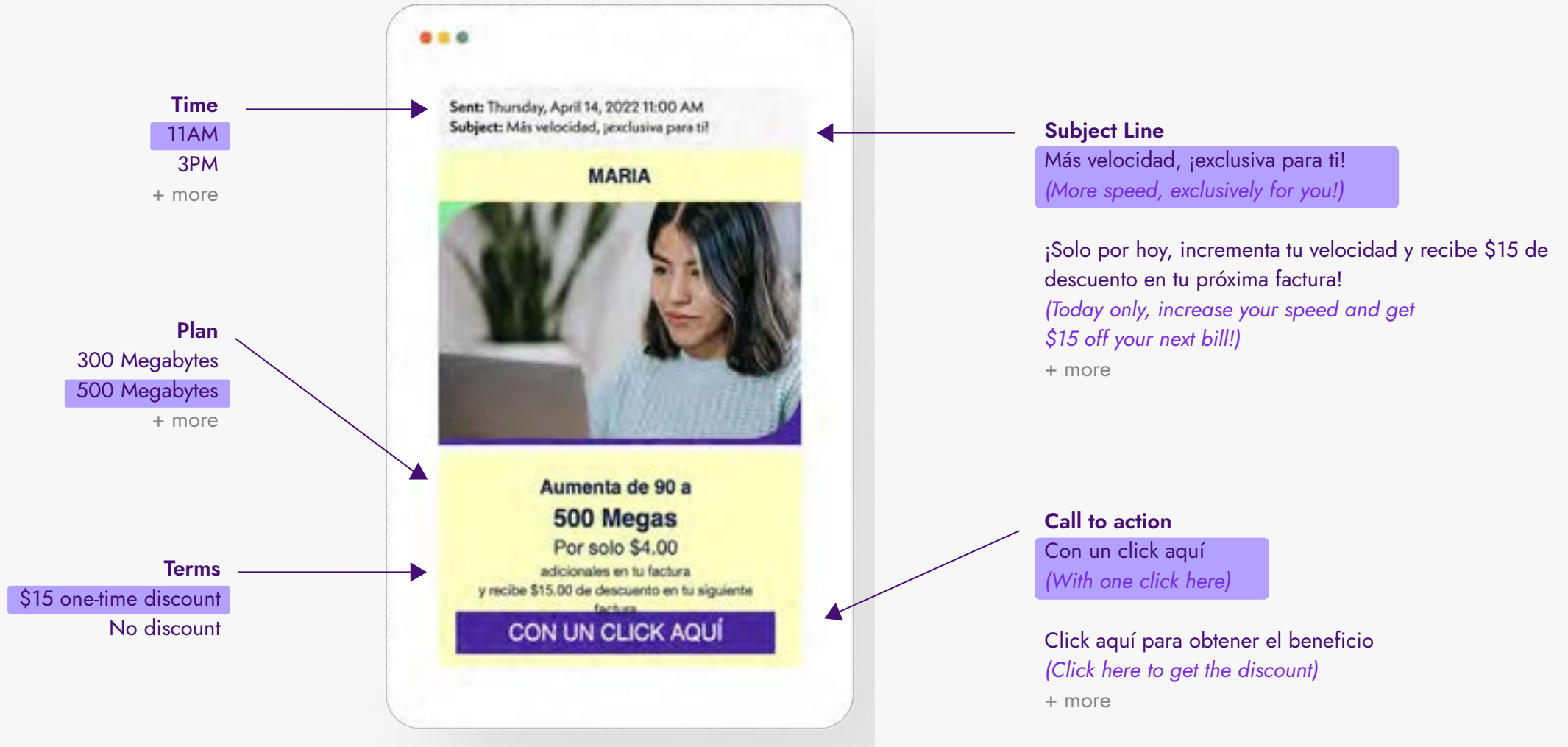
## Gaming

Maximizing inorganic monetization

**175%**

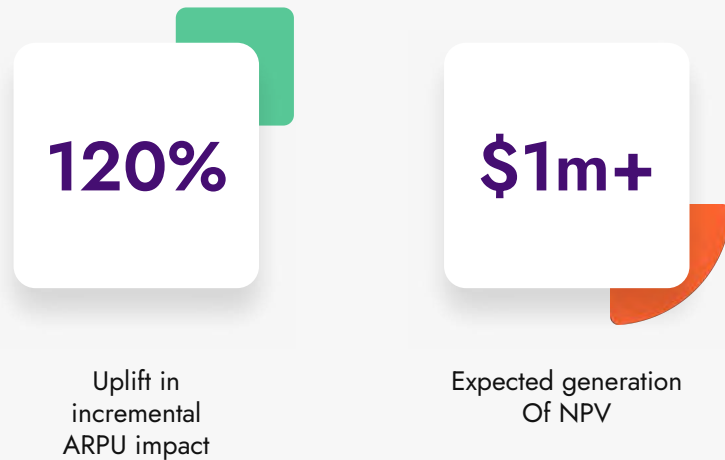
Uplift in conversion to monetized play

# A leading LATAM Telco is using OfferFit to personalize upsell offers ...

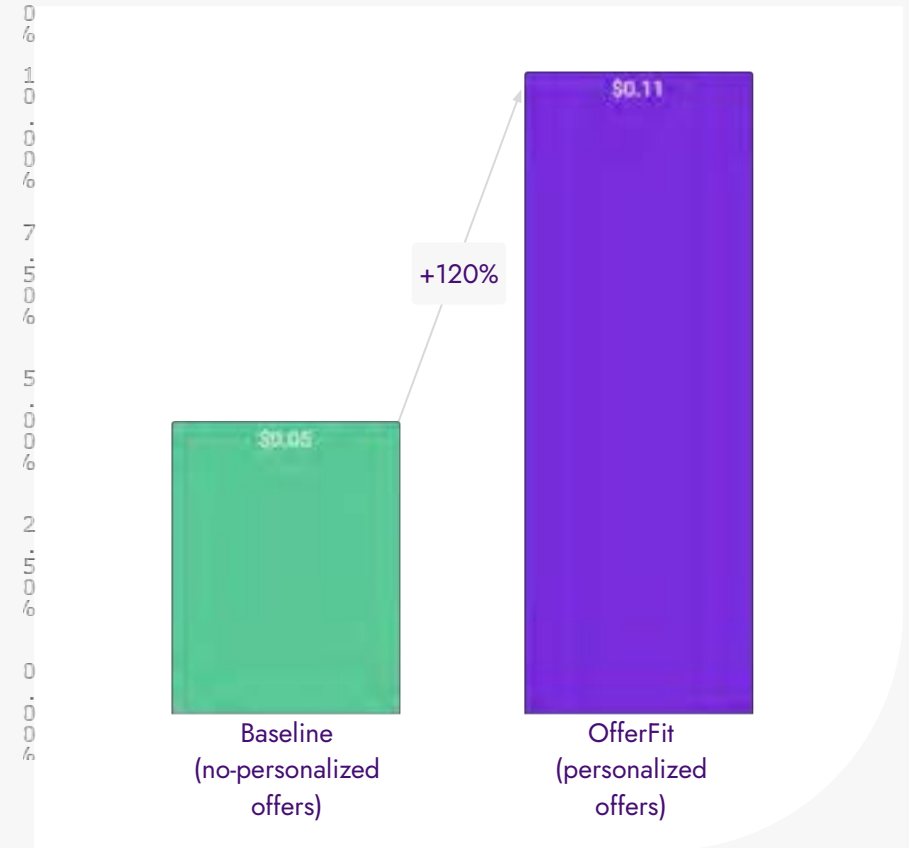


# ... which has boosted their campaign ARPU by >100%

Based on this impact, this company is currently considering expanding its implementation of OfferFit to additional use cases and geographies.



Incremental ARPU impact of upsell campaign



# Starter list of ideas for potential use for the Airline Industry

Leverage AI driven personalized communications to:

- **Optimize customer promotions:** Optimizing offers / coupons sent to customers based on engagement (e.g., transaction history, last purchase, basket size) to encourage conversions
- **Increase repurchase/transaction frequency:** Encouraging customers to repurchase airline tickets (across channels)
- **Cross-sell / Up-sell:** Nudge customers to purchase hotels, rental cars, or other services complementary to their product purchase (e.g. credit cards, seat upgrades, etc.)
- **Minimize cart abandonment:** Optimize customer communications to increase likelihood of completing an unfinished purchase
- **Encourage loyalty program adoption:** Encourage downloads of app or sign-ups for loyalty programs through personalized communication, incentives, reminders, etc.
- **Other ideas?**



# A leading airline is using OfferFit to improve abandoned cart conversions and upsell opportunities

## Capability Example

### Context

- A leading carrier is using OfferFit to personalize follow-ups for each shopper who abandons their cart online
- Prior to OfferFit, every abandoned cart shopper received one reminder email several hours after abandonment

### The airline is leveraging OfferFit to personalize the following for each individual customer:

- How long to wait after abandonment for initial e-mail (e.g., 2 hours, 5 hours)
- The cadence/frequency of reminders after the initial communication
- What messaging and copy to use (subject line, call to action, creative)
- If a vacation or ancillary purchase should be offered, and, if so, which one



# Ryan@OfferFit.ai



## **Panel**

# What is the Value of an Industry Accelerator?

### **Paula Pardo Esteve**

Manager Ideation, Strategy  
and Partnerships, IATA

### **Inaki Uriz Millan**

Co-Founder & CEO,  
Caravelo

### **Sebastien Texier**

General Manager Europe,  
Hopper

### **Gilbert Ott**

Head of Partnerships,  
point.me



## **Panel**

# How to Deal with Customers' Demands?

## **Anderson Pacchioni**

Senior Manager Digital  
Engagement, IATA

## **Ursula Silling**

CEO, Branchspace

## **Andrew Webster**

Director of Product Management,  
Accelya



## Digital Identity Program

# Gabriel Marquie

Senior Manager, Digital Identity, IATA



# An Identity framework is based on 3 concepts



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

**Verifiers**   
request  
information  
and a proof

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

# We need to have the same level of trust in digital as we do in the physical world

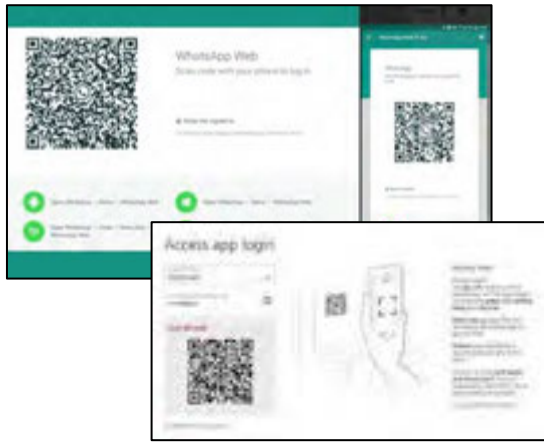


There is no physical interaction between the holder (customer) and the verifier (airline staff)



# There are some live implementations already

## Log in and Access Management



## Payment and government ID



## Health Care



Web logging by scanning a QR code:

- WhatsApp web log in
- Banking web portal

*The mobile App is your digital ID  
No more password*

Mobile payment / mobile driving license:

- Apple/Google pay
- Mobile driving license

*Digital Credit Card / driving licenses  
are credentials stored in mobile wallets*

Digital covid certificate

*The QR code on the certificate is a  
verifiable credential*



# Where can it be used?

## Retailing

Preferences and travel history during shopping

Prove a discount entitlement

Provide an offer tailored for the customer preferences

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

# Airlines and their partners are moving ahead

## Pilot mature concepts

- Identity management in distribution
- 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

# Modern Airline Retailing Program

Ambition

## Customer identification

Customer identity in service delivery

Contactless (One ID)

Customer identity in retailing

E2E PoC

Digital identity of value chain partners

Digital Identity in Distribution

## Retailing with Offers

Creating products and building new partnerships

Distributing priced personalized offers

Choice of digital payment options available to Customer

## Delivering with Orders

Offers fulfilled with orders only

Modern financial processes

Delivering on new partnerships with offers and orders only



**Panel:**

**How to Enable Innovation for Customer Centricity?**

**R. Kat Morse**  
Senior Manager  
Innovation and  
Partnerships, IATA

**Simon Gent**  
Senior SA Specialist,  
AWS

**Ursula Silling**  
CEO, Branchspace

**Edouard Baussier**  
Global Mobility and  
Travel Sales Director,  
IDNow

**Harvey Tate**  
Head of Tech  
Innovation, IAG

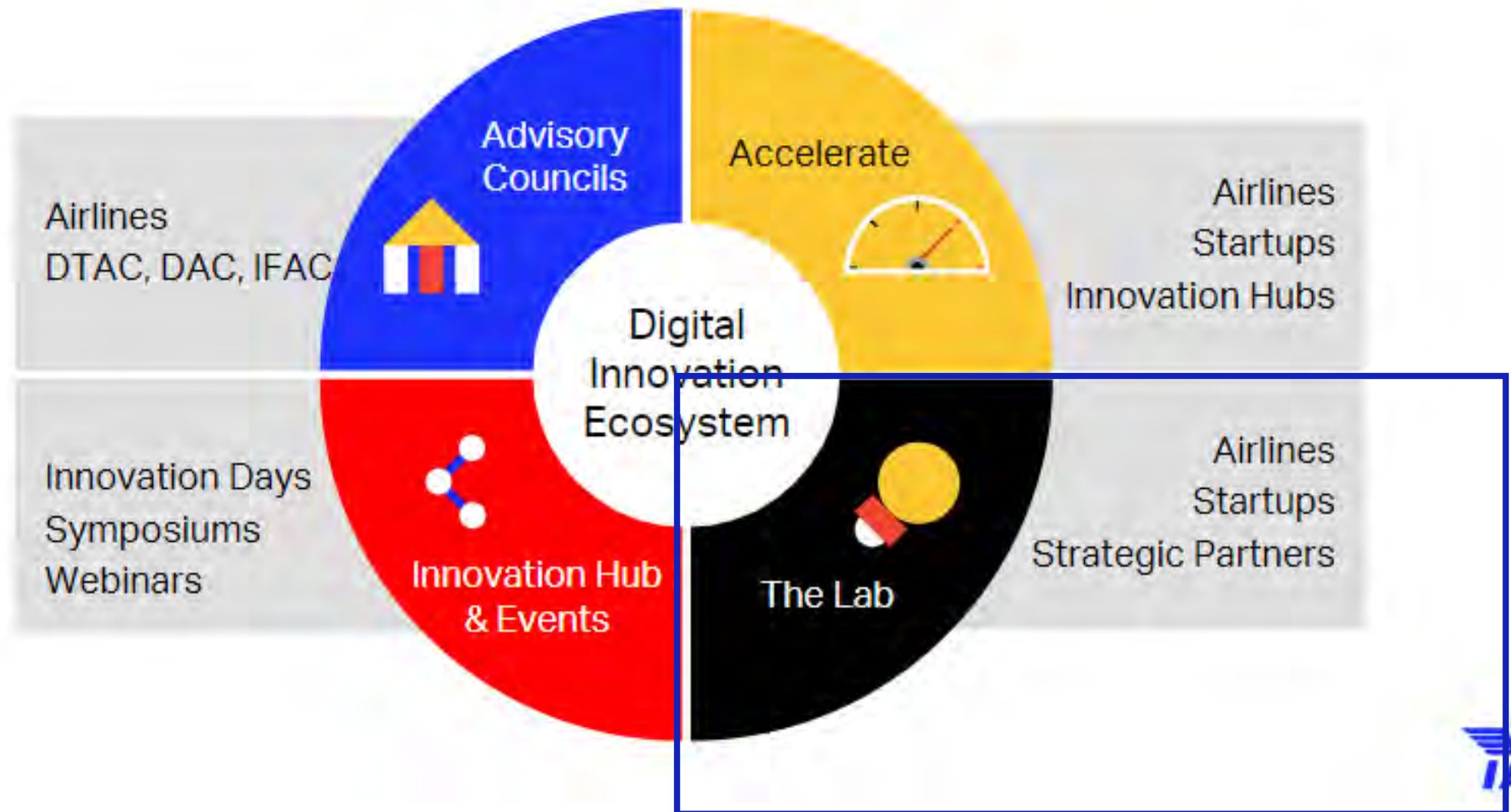
**Louise Cole**  
Head Customer  
Experience and  
Facilitation, IATA



# How to enable customer centricity through innovation



# The Innovation@IATA Ecosystem



# The Lab\* Testing Ground for POCs / Pilots

Connect airlines, tech providers, and startups who want to test solutions to solve industry problems

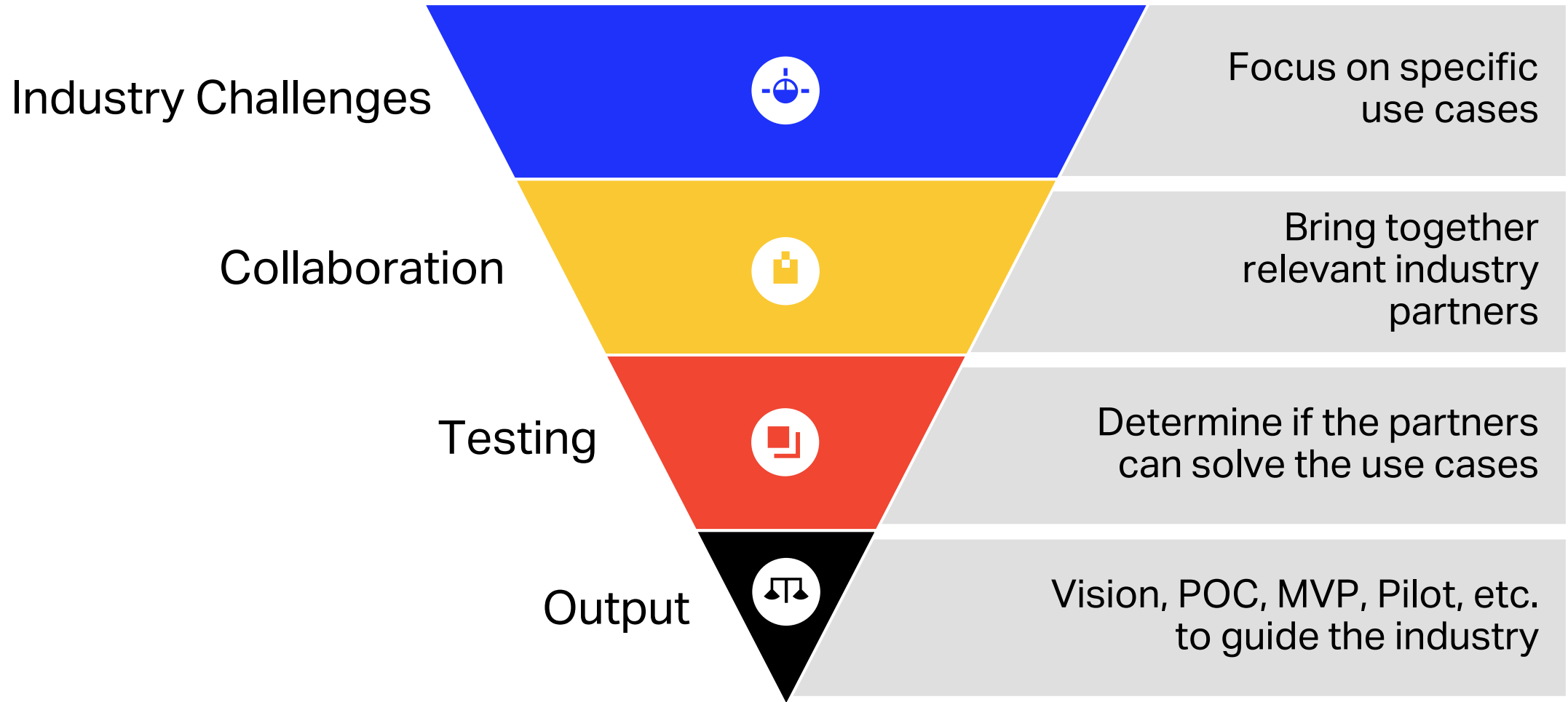
Innovation Sprint methodology to test ideas and concepts quickly

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)

# The Lab Innovation Sprints





# Modern Airline Retailing Program Design

Customer centric digital airlines  
in control of their product, money and data

## Customer identification

Customer identity in service delivery

Customer identity in retailing

Digital identity of value chain partners

## Retailing with Offers

Creating products and building new partnerships

Distributing priced personalized offers

Choice of digital payment options available to Customer

## Delivering with Orders

Offers fulfilled with orders only

Modern financial processes

Delivering on new partnerships with offers and orders only

# Objectives of the End-to-End PoC

## Digital Identity



### Customer Centricity

- Ensuring the customer has the right information at the right time
- Control over their data



### Interoperability

- Seamless end to end travel experience
- Credentials created by one company can be used by another

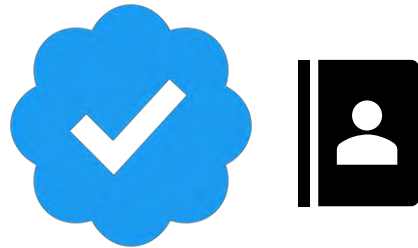


### Efficient Airline + Partner Processes

- Zero knowledge proof
- Control over their data / data they need from customer

# Meet Liam!

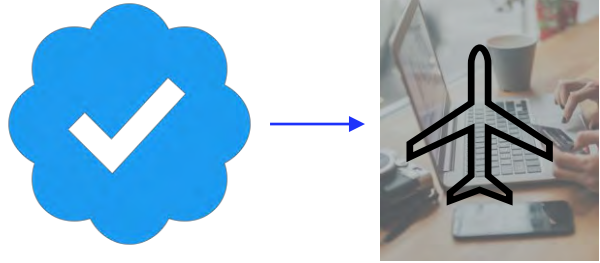
**Business Traveler going from Toronto to Sydney**



*\*Preferences and personal data stored in a wallet is pre-standard*



# Corporate Flow (Retailing)



Liam shops on Air Canada website.  
Employer VC will unlock corporate deals for Liam.

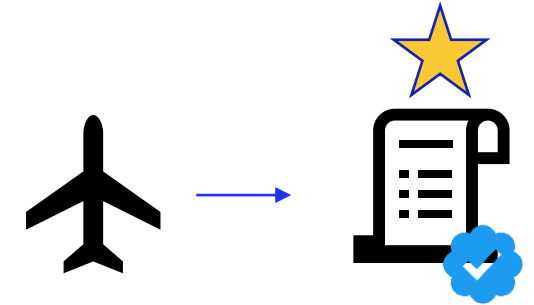


Airline verifies  
Employer VC

Sends offers to Liam

Liam accepts an offer

OMS knows it is Liam  
due to VC and creates  
offer

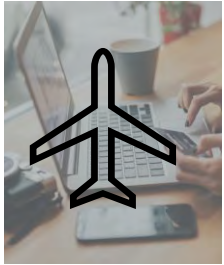


Airline creates an  
Order and passes this  
to Liam's digital wallet

Order is a Verifiable  
Credential

# Corporate Flow (Service Delivery)

Between booking & 2-3 days before departure



Airline asks if Liam wants to check travel requirements



Airline opens P2P link so Liam can share **attributes** of his Passport VC



Airline determines Liam needs an eTA and offers a direct channel with the government



Australian Border Force will issue an eTA directly to Liam's wallet as a DTA VC

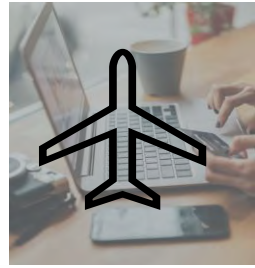
# Corporate Flow (Service Delivery)

2 -3 days before departure

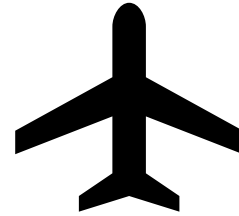



Airline asks for DTA VC + Passport VC

Liam finalizes intent to fly, no dangerous goods, etc.

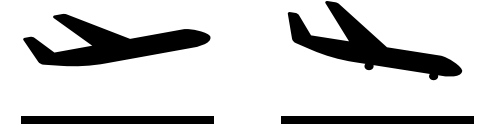


Airline makes status update to Order VC with seat number and other information.




Liam discloses his recent biometric image + trip details to Air Canada 

Air Canada receives biometrics and prepares contactless process for Liam

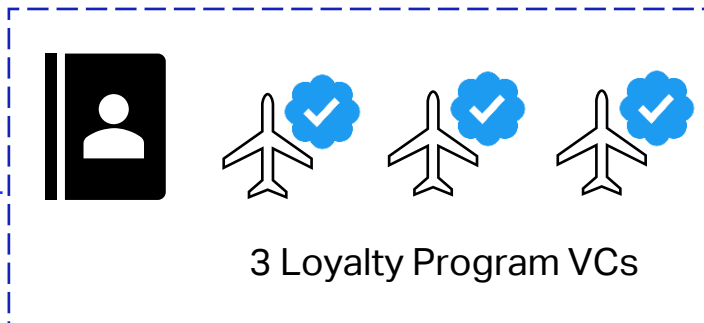


Liam uses biometric gates to board in Toronto and lands in Vancouver.

Without re-enrolling, Liam boards in Vancouver and lands in Sydney 

# Meet Liam (again)

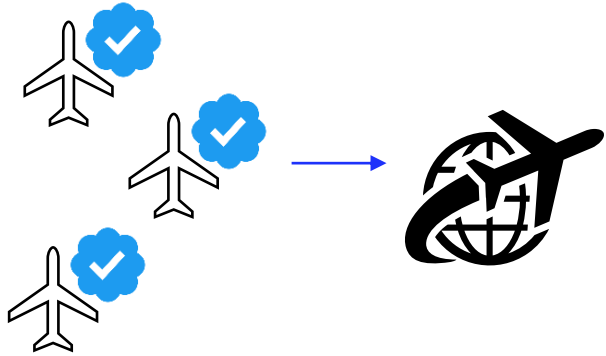
Leisure Traveler going from London to Rome



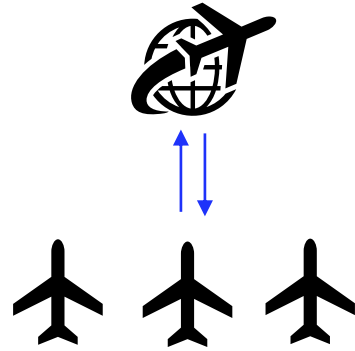
*\*Preferences and personal data stored in a wallet is pre-standard*



# Leisure Flow (Retailing)



Liam shops on Trip.com mobile app for flights, pushing his 3 Loyalty VCs to the OTA



Trip.com requests offers from airlines.

Airline 1 creates offer  
Airline 2 creates offer  
BA creates offer

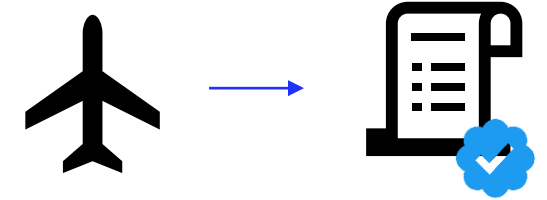
Airlines send to Trip.com



Trip.com displays the 3 offers

Liam accepts offer from BA

Liam sends Loyalty VC + attributes of his Passport to BA to create the Order



Airline creates an Order\* and passes this to Liam's digital wallet

Order is a Verifiable Credential



# Corporate Flow (Service Delivery)

Between booking & 2-3 days before departure



Trip.com asks  
if Liam wants  
to check travel  
requirements



Trip.com opens  
P2P link so Liam  
can share  
**attributes** of his  
Passport VC



# Corporate Flow (Service Delivery)

2 -3 days before departure

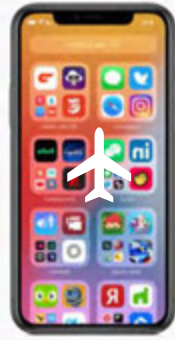


Airline asks for  
Passport VC

Liam finalizes intent  
to fly, no dangerous  
goods, etc.



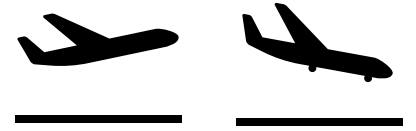
Airline makes  
status update to  
Order VC with seat  
number and other  
information directly  
to Liam's wallet



Trip.com asks  
Liam if he wants a  
contactless travel  
experience by  
push notification



Liam discloses his  
recent biometric  
image + trip details  
to LHR



Liam uses  
biometric gates to  
board in LHR and  
lands in FCO.

**Panel:**

**How to Enable Innovation for Customer Centricity?**

**R. Kat Morse**  
Senior Manager  
Innovation and  
Partnerships, IATA

**Simon Gent**  
Senior SA Specialist,  
AWS

**Ursula Silling**  
CEO, Branchspace

**Edouard Baussier**  
Global Mobility and  
Travel Sales Director,  
IDNow

**Harvey Tate**  
Head of Tech  
Innovation, IAG

**Louise Cole**  
Head Customer  
Experience and  
Facilitation, IATA



**LUNCH BREAK**



**Panel:**

**Transition Supported by Innovation**

**Matt McKinley**

Senior Manager  
Digital Transformation Programs  
IATA

**Alex Walling**

Chief Strategy Officer  
Rapid

**Patrick Brosse**

API Design & Data Model Senior Expert  
Amadeus



## Portal for Developer Communities

**Peter Sun**

Senior Manager Open Data Ecosystem  
IATA

**Alex Walling**

Chief Strategy Officer, Rapid



# IATA Open API Hub

The airline industry's one-stop portal to discover and connect through APIs, in partnership with the **RapidAPI Enterprise API Hub**



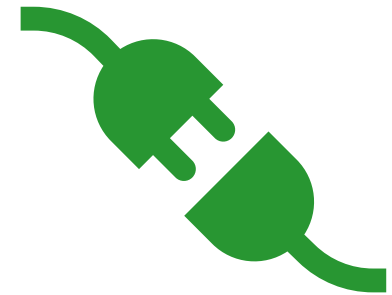
**Discover** APIs



Build new trusted **partnerships** and foster **competition**



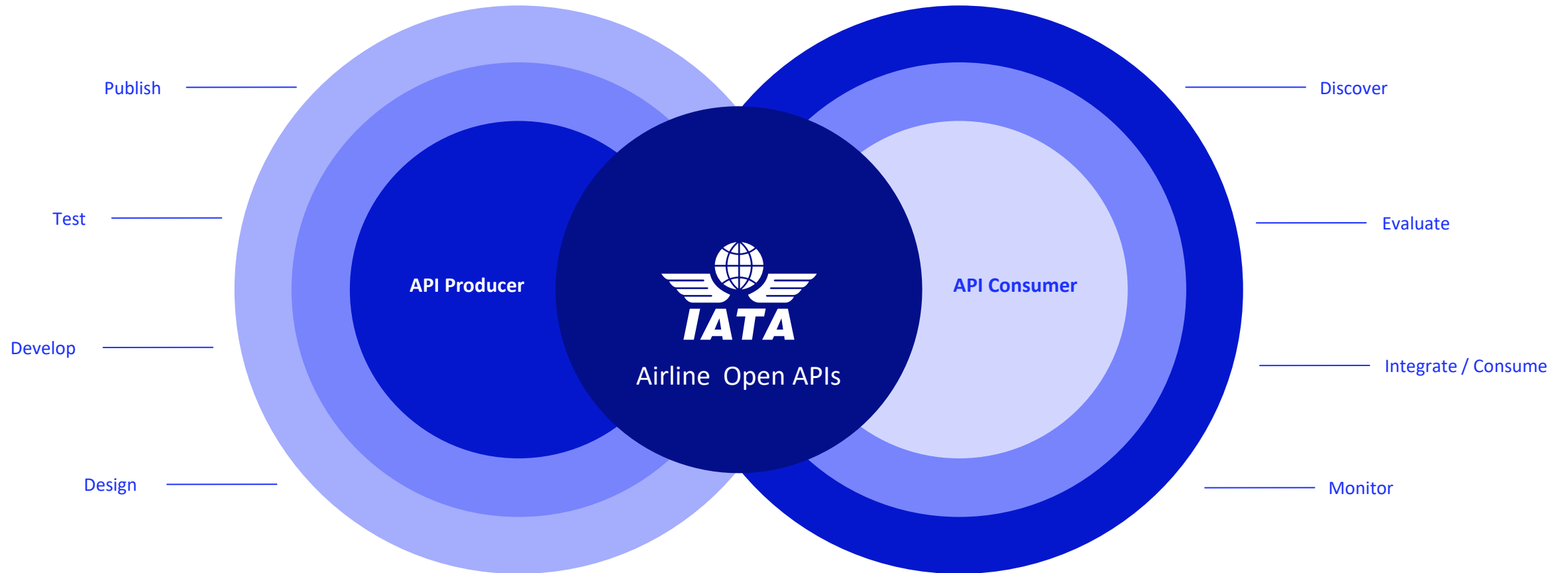
**Promote** traffic to your APIs



**Connect** without compromising **Control** of your data



# Benefits



A SEAMLESS, INTEGRATED DEVELOPER EXPERIENCE

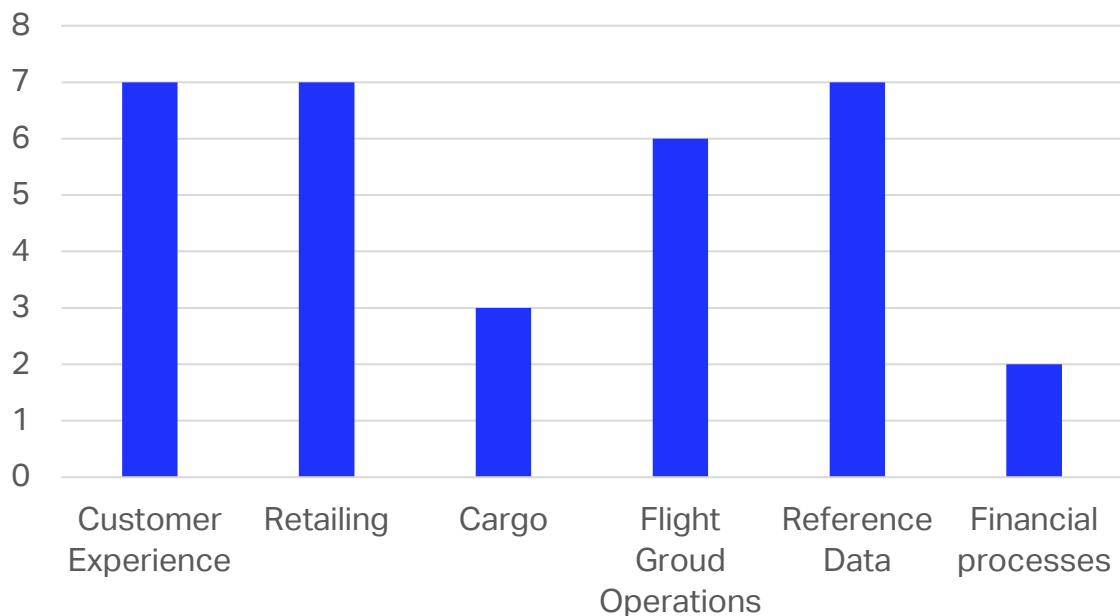


# Promote your APIs on the hub!

## Figures

- 190+ users from 129 Organizations
- 57 APIs published

### Open APIs by category



## Active Organizations



# QUESTIONS ?



Contact: [openapi@iata.org](mailto:openapi@iata.org)

**Roundtable**

Generative AI

**Kim Macaulay**

Chief Information and Data Officer  
IATA

**Daniel Friedli**

Managing Director  
Travel in Motion



# Roundtable

# Generative AI

**IATA  
INNOVATION  
DAY**

Geneva, Switzerland  
28 June 2023

1. Customized Offers
2. Disruption Management
3. Route Optimization
4. Dynamic Pricing & Yield Management
5. Personalize Customer Travel Plans
6. Coaching and training / workforce
7. Back-office customer support
8. Travel agent support
9. Language models built on human language
10. Marketplaces



## **Thinking in Decades:**

Exploring the Future of Aviation

# Tino Klähne

Director of Strategic Innovation & Intelligence  
Lufthansa Innovation Hub





# THINKING IN DECADE(S)

IATA – Innovation Day  
28.06.2023 - Geneva



WHY

THINK IN

DECADES?



Our ambition

TAKING TRAVEL  
TO **NEW**  
DESTINATIONS





## Capabilities

STRATE NEW TRANS  
GIC INTEZ BUSI FOR  
LIGENCE NESS MATION



HOW

WE DO IT!



**CONNECT THE  
UN/OBVIOUS  
AT SCALE**

**LEADING  
INDICATORS**

**LAGGING  
INDICATORS**

# LEADING INDICATORS

# LAGGING INDICATORS

## INPUT

Making sense of **interest**




## FUNDING DYNAMICS

Venture Capital, CVC

 PitchBook  crunchbase  dealroom

## SCIENTIFIC INTEREST

Research Grants, Projects, Papers

 feedly  Google Scholar  ResearchGate

## Startup Investment Trends in Travel and Mobility Tech

### Startup Investment Trends in Travel and Mobility Tech

- An in-depth analysis of venture capital trends in the Travel & Mobility Tech ecosystem.
- LIH core research piece – updated every year – Fourth edition
- Venture Capital / Funding dynamic as a proxy for overall sector attractiveness with +2800 startups
- Follow the money - Category-specific funding trends to spot opportunity areas

## Startup Investment Trends in Travel and Mobility Tech

p.2 **The startup ecosystem grows**  
Global network of startups in Travel and Mobility Tech

p.3 **Funding bounced back**  
Global VC funding in Travel and Mobility Tech by year

p.4 **Dollar amounts slightly drop**  
Global VC funding in Travel and Mobility Tech by quarter

p.5 **Deal activity badly down**  
VC deal count in Travel and Mobility Tech by month

p.6 **Young startups struggle most**  
VC deal count in Travel and Mobility Tech by deal stage

p.7 **Ground transport dominates**  
Share of VC funding in Travel and Mobility Tech by sector

p.8 **Covid-19 pushed aviation**  
VC funding in Travel and Mobility Tech by sector and year

p.9 **The winners of the pandemic**  
Average yearly investment value by category

p.10 **The losers of the pandemic**  
Average yearly investment value by category

# 2021

Lufthansa Innovation Hub

## Startup Investment Trends in Travel and Mobility Tech

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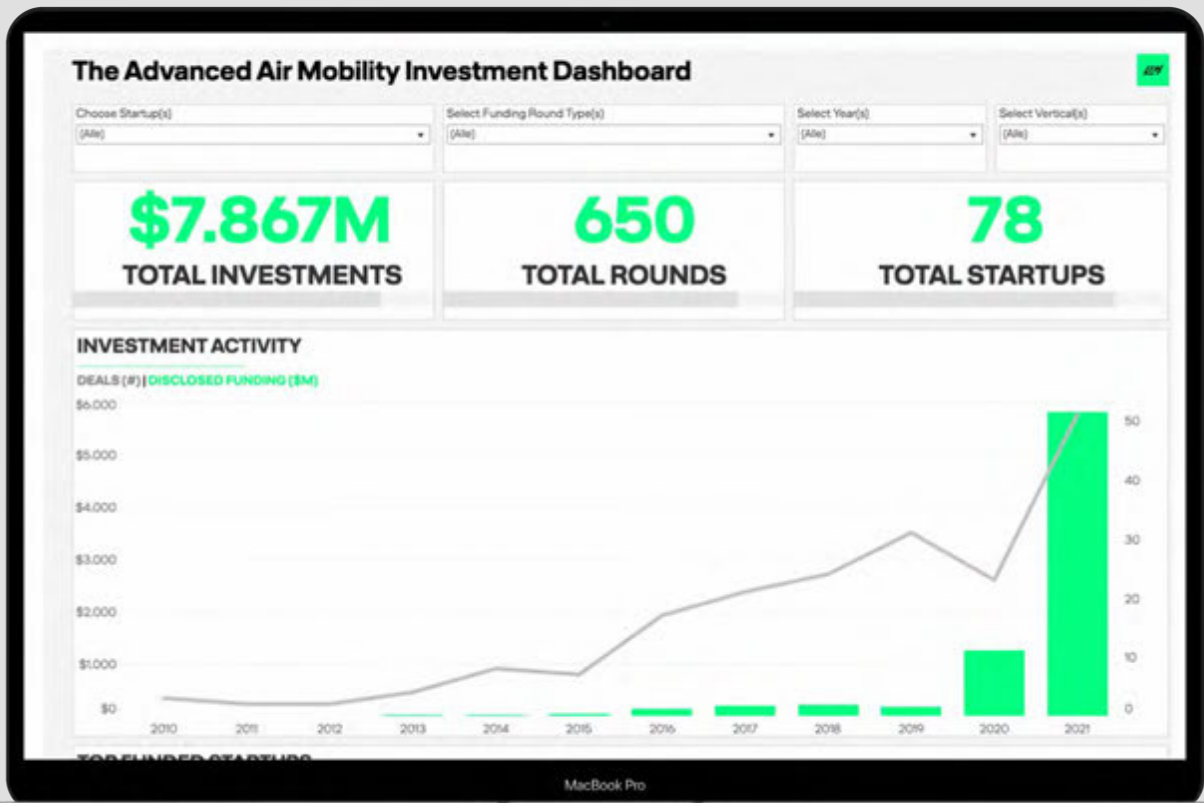
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Global VC funding in Travel and Mobility Tech by quarter



→ **AAM Investment Dashboard**

Interactive Tableau Dashboard that tracks all Venture Capital Investments in Advanced Air Mobility



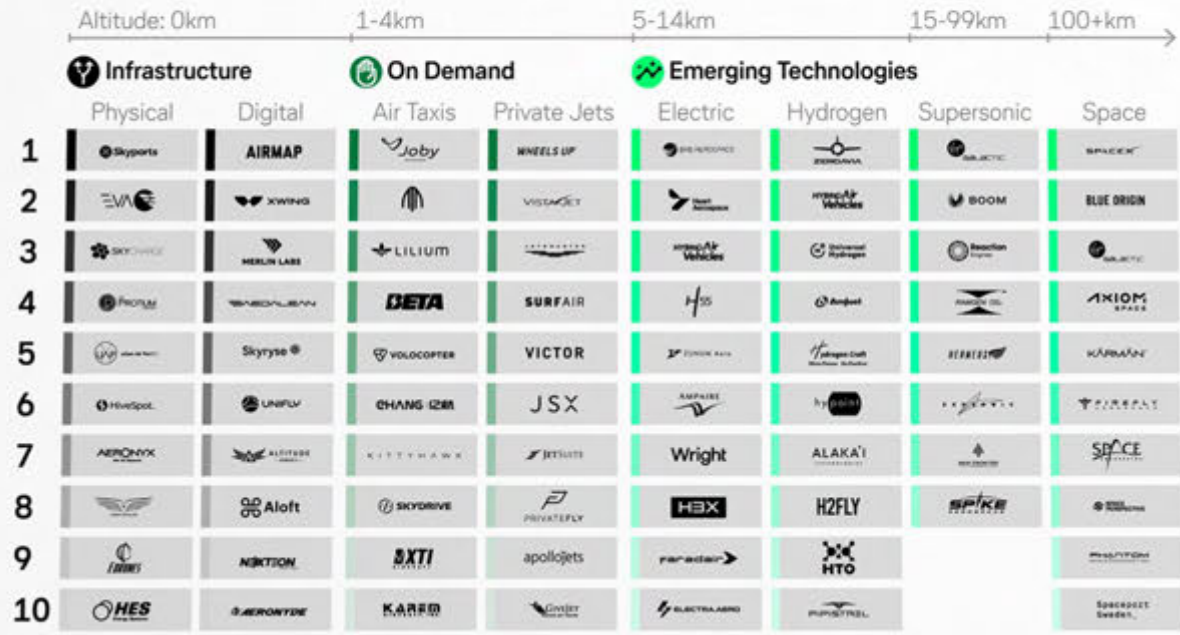
VC INVESTMENTS BY STAGE

MEDIAN DEAL SIZE DEVELOPMENT

TNMT

# Reaching for the stars: The New Air Travel Leaderboard

New Air Travel startups ranked by VC funding raised



Source: Lufthansa Innovation Hub, TNMT.com, PitchBook Data Inc.

→ AAM Leaderboard

Deep dive into the leading (by attracting Venture Capital) actors in across all AAM categories



# LEADING INDICATORS

# LAGGING INDICATORS

## INPUT

Making sense of **interest**

## OUTPUT

Making sense of **activities**

### FUNDING DYNAMICS

Venture Capital, CVC

 PitchBook  crunchbase  dealroom




### TECH DYNAMICS

Patents, Wikipedia Edits

 PATENTSIGHT  WIKIPEDIA

### SCIENTIFIC INTEREST

Research Grants, Projects, Papers

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### ACTOR DYNAMICS

Incorporations, Launches, Partnerships  
Personnel Dynamics

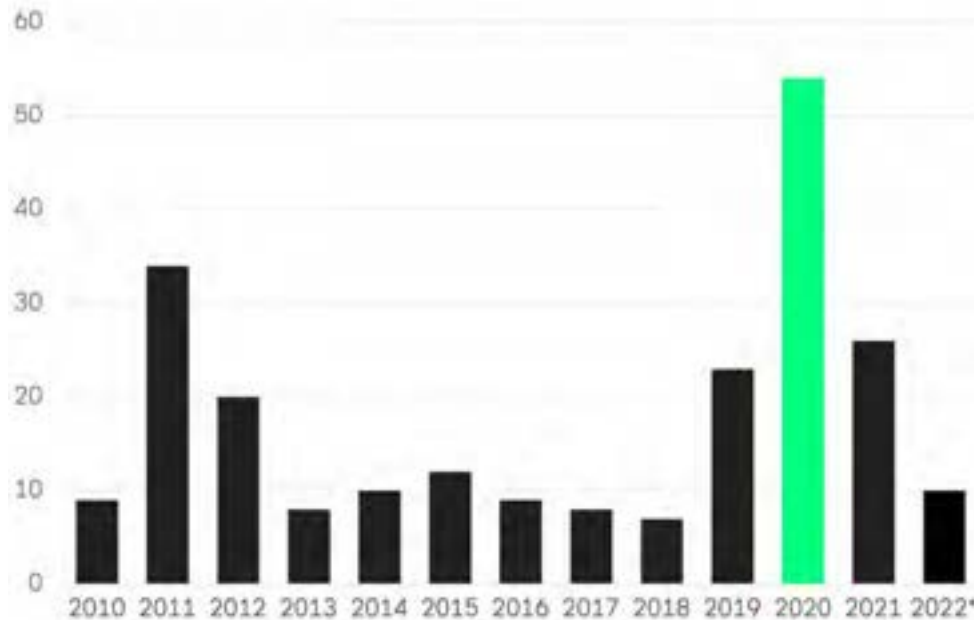
 feedly  Thinknum



# The power of Wikipedia predicting hype cycles

## TNMT The Wikipedia article on “Aviation Biofuel” was heavily edited in 2020

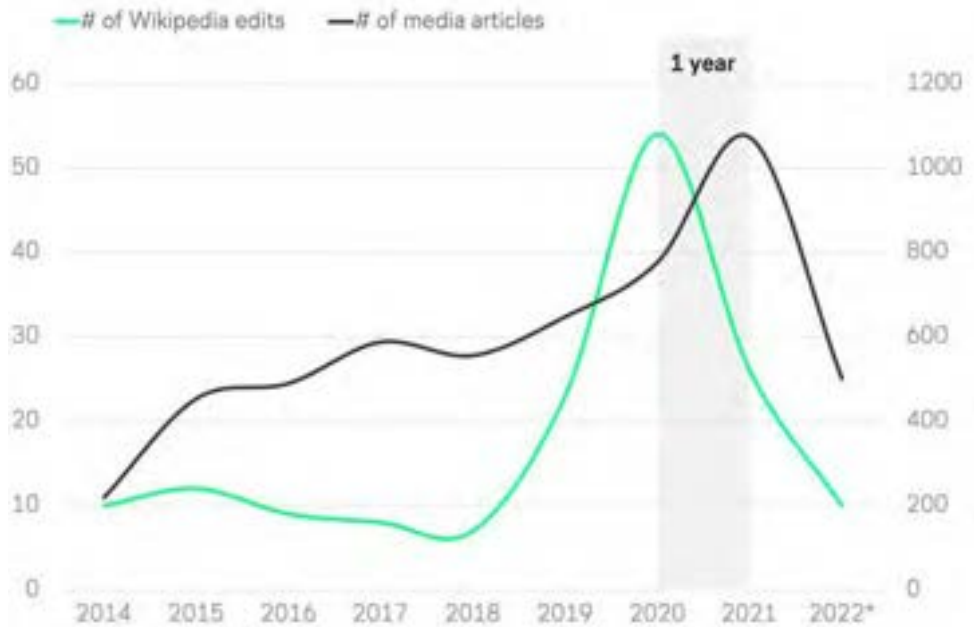
Number of edits in Wikipedia’s article on “Aviation biofuel”



\*As of Apr 5, 2022  
Source: Lufthansa Innovation Hub Analysis, TNMT.com, Wikipedia

## TNMT Wikipedia seems to have predicted the SAF media hype in 2021

Tracking the hype on aviation biofuel



\*As of Apr 5, 2022  
Source: Lufthansa Innovation Hub Analysis, TNMT.com, Wikipedia, NetBase Quid Inc.



→ **AAM Stakeholder Ecosystem**

Whitepaper in collaboration with Osinto – Mapping the Stakeholder network of the Advanced Air Mobility Ecosystem across different types of actors & geographies

# LEADING INDICATORS

# LAGGING INDICATORS

## INPUT

Making sense of **interest**

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Making sense of **activities**

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Making sense of **perception**

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### MEDIA SENTIMENT

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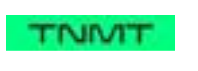
### USER BEHAVIOUR

Search, App DLs & Usage, Site Visits

 SimilarWeb  data.ai  Google

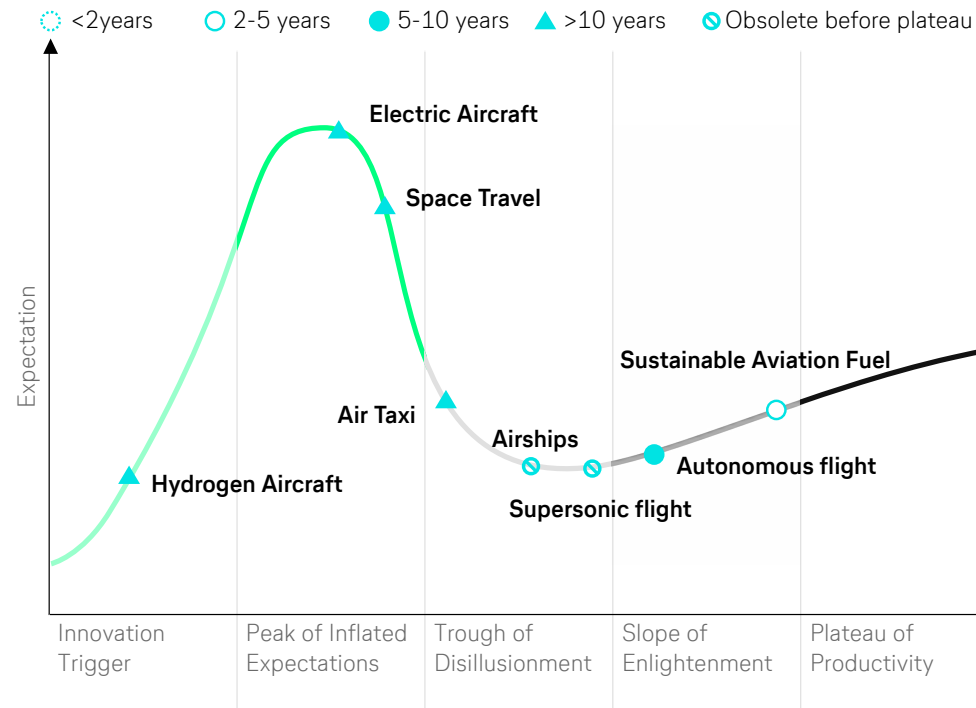


# The Hype-Cycle of Future Aviation



## Mapping the major technologies shaping the future of aviation

### The New Air Travel Hype Cycle



Source: Lufthansa Innovation Hub, TNMT.com, inspired by Gartner

## Gartner hype cycle framework applied to all major New Air Travel Technologies

- Analysis of eight key emerging technologies that have the potential to change the way we travel from A to B through the air
- Sustainable Aviation Fuel (SAF) is the most ready-to-use technology and included due to its potential to reduce aviation's CO2 footprint.



# LEADING INDICATORS

# LAGGING INDICATORS

## INPUT

Making sense of **interest**

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Making sense of **activities**

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Making sense of **results**

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### CONSUMER SENTIMENT

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 NETBASE GUID  Brandwatch

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 SimilarWeb  data.ai  Google

### MARKET DATA

Growth Rates, Market Shares, Sales

 statista

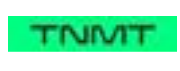


➔ **Tripadvisor Analysis**

Sentiment & relevance analysis of 15.000 public reviews for 12 airlines. Derived strategic insights for product development.



# TNMT Market Index



## Sector Attractiveness Indicator

- TNMT index – 2 sub-indices
- Live product on TNMT.com (soon)
- Quarterly Commentary in newsletter



# LEADING INDICATORS

# LAGGING INDICATORS

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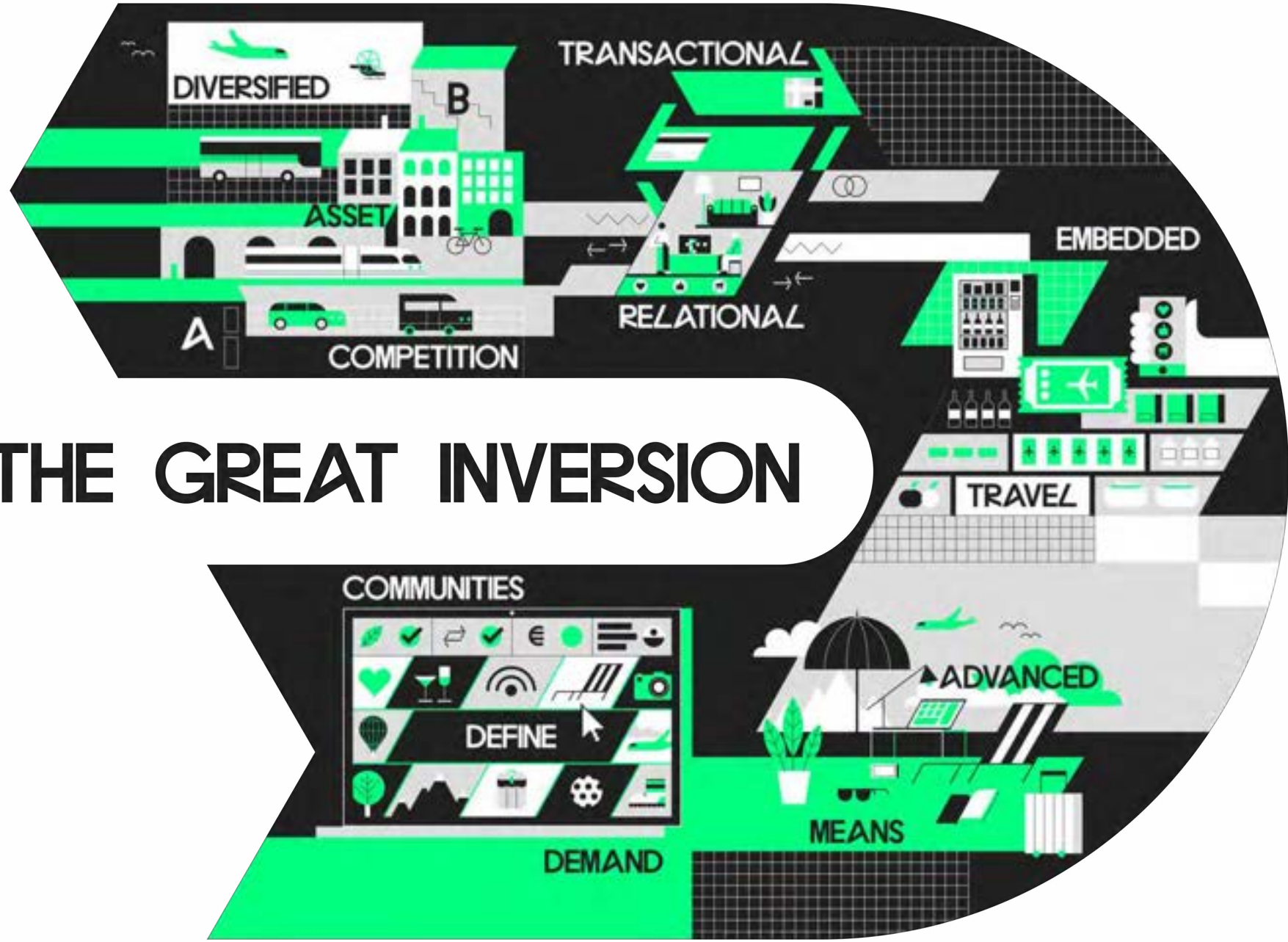
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 statista



WHAT

WE SEE!

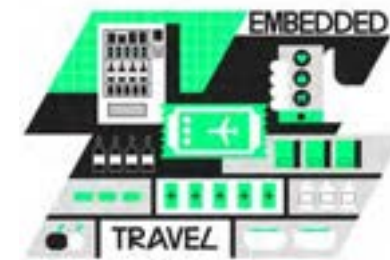


# THE GREAT INVERSION



# The Great Inversion

## The Pivotal Transformation of the TNMT Value Chain



### ➔ Self-Empowered Traveler

→ The disruption of decision making

### ➔ Longtail of Travel

→ Verticalization of audiences

### ➔ Review Economy

→ Word of mouth coming to travel

### ➔ Blurred Travel

→ Emerging use cases

### ➔ Virtual Substitutes

→ Virtualization of travel use cases

### ➔ Trip3

→ Towards the next industry stack

### ➔ Relational Trinity

→ The post-ticket era

### ➔ Share of Life

→ Super apps, Platforms & Ecosystems

### ➔ (No)ownership Spectrum

→ The Sharing Economy is growing up

### ➔ Social Distribution

→ Creator Economy

### ➔ Bookable Content

→ Direct Inspiration

### ➔ Travel-as-a-service

→ Ubiquitous Travel Retail

### ➔ High-Flyers

→ A sky full of competition

### ➔ Asset Dexterity

→ Reviewing asset strategies

### ➔ The soft asset gap

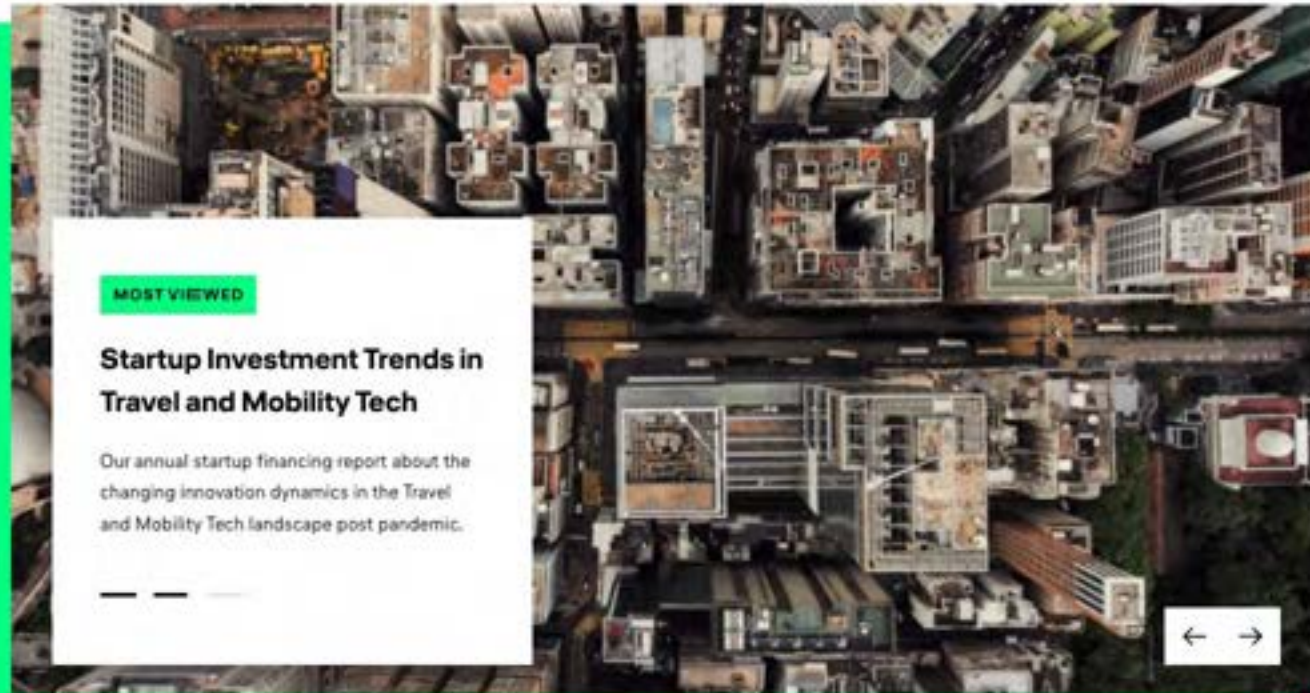
→ Human factor in business

# Learn more

visit [TNMT.com](https://tnmt.com) and sign up for our bi-weekly newsletter

TNMT

The industry deep dive into  
Travel and Mobility Tech



→ SCAN ME



# Thank you!

**Tino Klaehne**

Lufthansa Innovation Hub

Director Strategic Innovation & Intelligence

[tino.klaehne@lh-innovationhub.com](mailto:tino.klaehne@lh-innovationhub.com)

**Panel:**

**Industry Innovation Challenges & Opportunities**

**Stephan Copart**

Head of Digital  
Transformation, IATA

**Hamidul Huq**

Innovation Coach  
Genève Aéroport

**Peter Choroba**

Head of Innovating and  
Emerging Activities,  
EUROCONTROL

**Stefan Nothelfer**

Director Partnerships & New  
Business Ventures  
Lufthansa Innovation Hub



**Panel:**

**What About Diversity?**

**Jane Hoskisson**

Director Talent, Learning,  
Engagement and Diversity  
IATA

**Orla Benson**

SVP Environment Social Governance  
SMBC

**Anna Ghion**

Account Manager for IGO AIR, AWS





## What's Next?

# Anderson Pacchioni

Senior Manager, Digital Engagement, IATA



# IATA INNOVATION DAY

Geneva, Switzerland

28 June 2023

# THANK YOU!

