

A night-time photograph of the Chicago skyline, featuring prominent skyscrapers like the Willis Tower. The sky is filled with vibrant, curved light trails in shades of purple, pink, and blue, creating a dynamic, futuristic atmosphere. The city lights are visible at the base of the buildings.

Tom Gregorson

CSO

ATPCO

atpco

Now and into the future

Published fares



Fare management



Traditional distribution



Commoditized displays



Revenue accounting



Now and into the future

Published fares



Continuous pricing

Fare management



Offer management

Traditional distribution



Flexible distribution / NDC

Commoditized displays



Visual merchandising

Revenue accounting



Order management

Building the big picture





31%

of sold offers are
dynamically created



82%

growth since
2022

Global expertise



106

Create and distribute the offer

2025 Direction



Maintain quality and performance of traditional systems and data and **rationalize** our portfolio of tools and data



Ensure traditional data collection and subscriptions continue to evolve to **help airlines advance their retailing vision** while **maintaining interoperability** across offer creation approaches.



Drive **adoption of new data and tools**, and close additional **NDC** gaps

2025 Progress to date



YTD Reliability and Security Score 1.0
Candidate list for deprecation and simplification

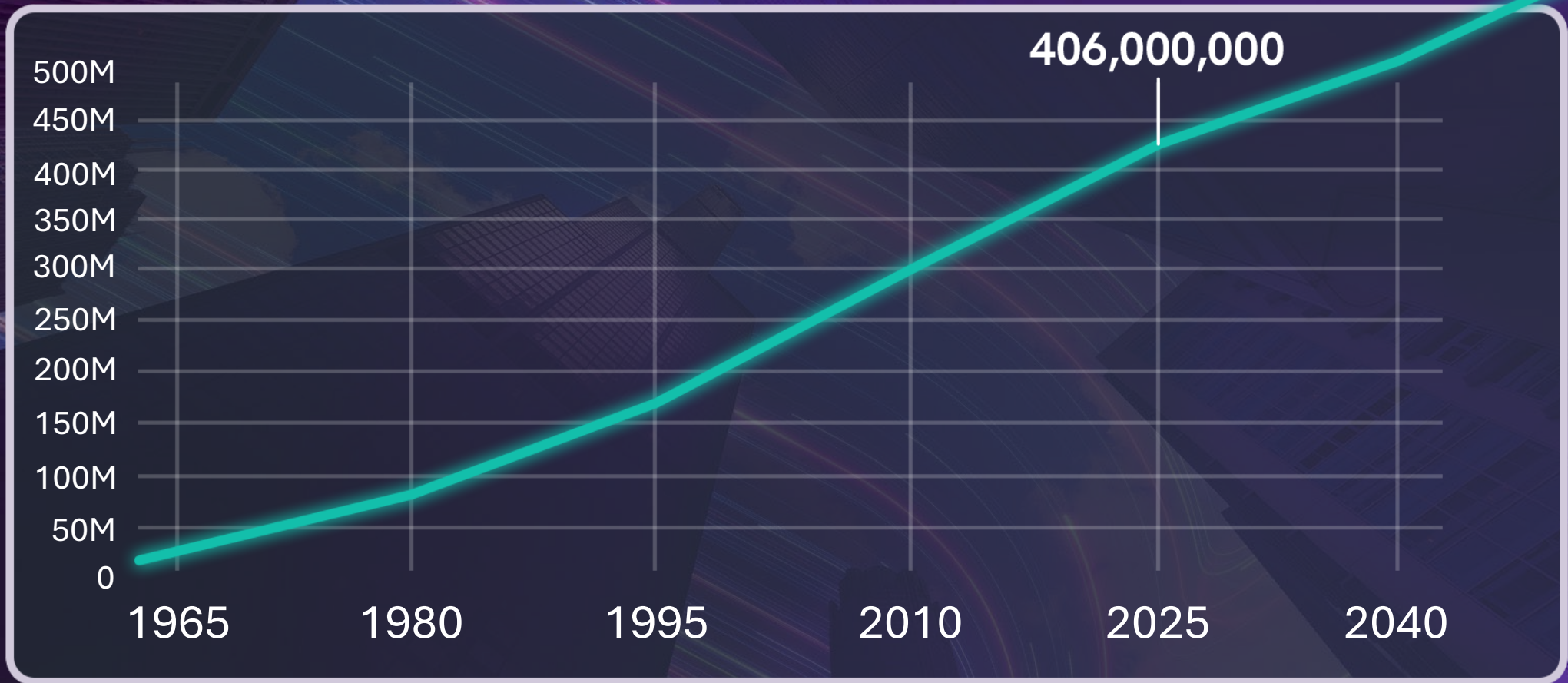


Continue to evolve Architect and Express Contracts
Initial Plan to improve Subscriptions Processing
neoPrice development for Assembled Data Q3

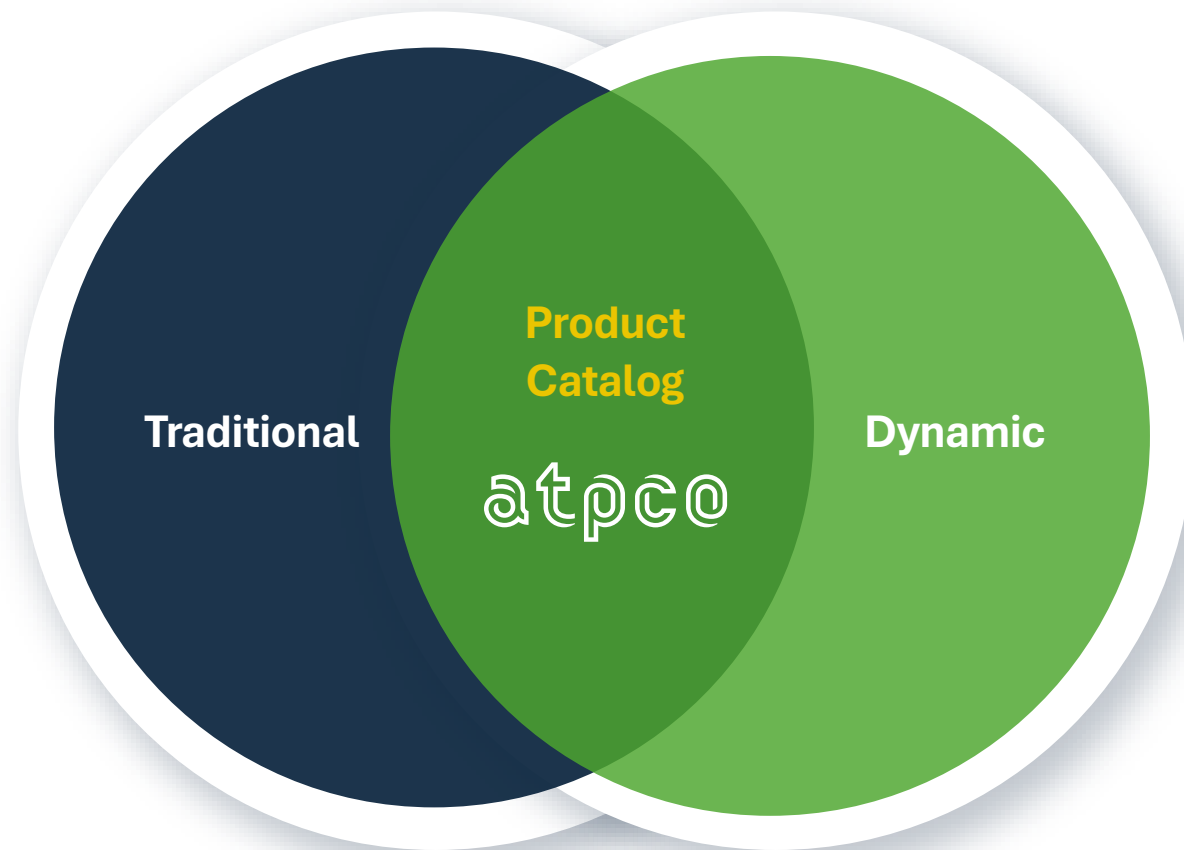


Product Catalog, Product Performance
Delivered Aggregator List (Appendix S)
Several NDC Items in progress

More details in the Appendix



ATPCO Product Catalog



Wherever an airline is on its dynamic offer journey, Product Catalog can serve as a bridge

- Supports interoperability between dynamic offer airlines and traditional offer airlines
- Translates and maintains data between traditional and dynamic
- Supports atomic products and bundles

Q2 2025: Product catalog API

Q4 2025: Create base catalog for airlines

TBD: Replace Branded Fares UI with Product Catalog

Product Catalog 2025: Offer Creation POCs

Product-based search

- Current process: Heavy computation, unsatisfactory results
- Not conducive to attribute-based search and product-driven offer creation
 - Produces a high number of offers with insufficient depth for all brands and product offerings
 - Not a match to what the customer wants

Insert the Product Catalog earlier in the process to provide efficiencies and better depth and quality of results. Build fewer itineraries, price fewer options, and have better targeted brands and offers.

Traditional + Dynamic

- Interoperability required between traditional and dynamic data
- Build offers based on traditional data, and
 - Dynamically supplement with new products or bundles that are not based on traditional data

Using the Product Catalog to define dynamic ancillary bundles and link to Routehappy content to be accessed during the shopping flow.

Settlement

- Settlement data is unknown at offer creation
- Cost and delay in settlement
 - Real-time exchange is not in the near future
 - Classical process of having interline settlement information used in the RM process (bid price exchange) covers only 5% of airlines in the world

Include settlement data in the Product Catalog so that the same values are used in offer creation and then used in settlement.

Four data types to enable dynamic offers



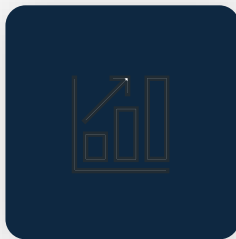
Offer Data

*What's for Sale?
Competitive insights*



Traveler Insights

Who's Buying?



Order Data

*What's being purchased?
Product performance
insights*



Economic insights

What is influencing?

2025 NDC Design Team Priorities

Seller's Markup (BR1848)

- **Status:** POC to start

Airline Offer Attributes (BR1995)

- **Status:** Drafting detailed Solution

Ancillary Offer Rules (BR1994)

- **Status:** Drafting Initial Solution

Present the offer

2025 Direction

- ✓ Migrate Routehappy Visuals (UPA) into Community Participation to grow adoption
- ✓ Leverage Visual Content as a differentiator – Seat Maps, 360 Tours
- ✓ Integrate Product Catalog & Expand coverage and create standardization of content for Routehappy Attributes

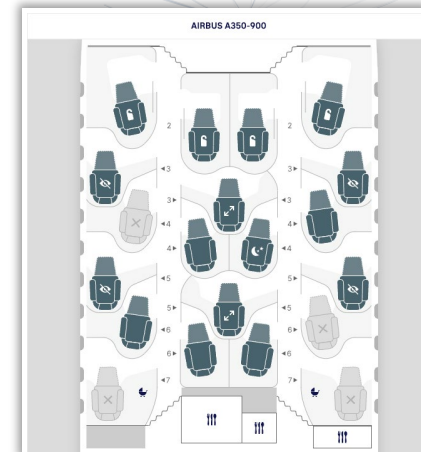
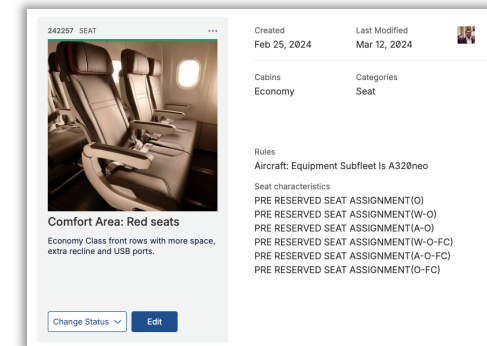
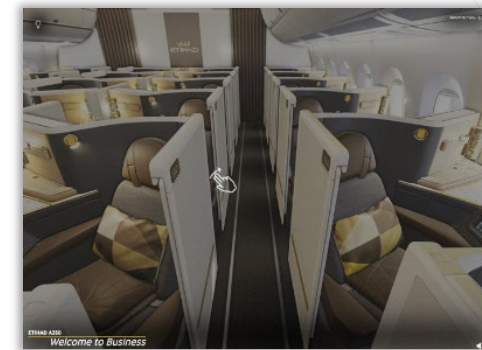
2025 Progress to date

- Self Service enhancements, Pricing model near complete
- Seat Standard Design Team, +6 airlines with Seat content, 360 POC and LOI with Renacen
- Implementation of first DAB version with one airline and one channel underway

More details in the Appendix

The 2025 Seat Plan

- Define an industry-supported **standard for seat maps** with collaboration
- Validation of **360 PoC** - case study to show these new visuals improved engagement, conversion, and upsell
- Increase subscribed airlines having distributed **seat characteristics** content



Use Cases

①

**Dynamic Ancillary
Bundles on top of
Brands**

Bundle on top of Brand

Ancillaries grouped together into bundles offered post brand selection in shopping flow

②

**New NDC Exclusive
Brand**

NDC Exclusive Brand

Offered as a new brand only via NDC

③

**Customized
Corporate Bundle**

Corporate Bundle/Brand

Customized Bundles targeted to specific corporate customers

Post, service & settle

2025 Direction

- ✓ Deliver IATA Tax partnership
- ✓ Settlement Value Project Decision
- ✓ Finalize ISR AWS migration

2025 Progress to date

- Agreement in legal review; Operations path defined; Developments started for new data
- POC complete, showcased at Elevate, RASS approved to move to MVP in the product
- Planning to move on ATPCO AWS

More details in the Appendix

IATA TTFC Partnership status and timeline



Phase 0

2024

Announcement made at IATA
WPS/WFS Oct 31, 2024

2025

Final agreement to be signed
by end of Q2 2025

Phase 1

2025

Combined ATPCO-IATA
offering & build new services

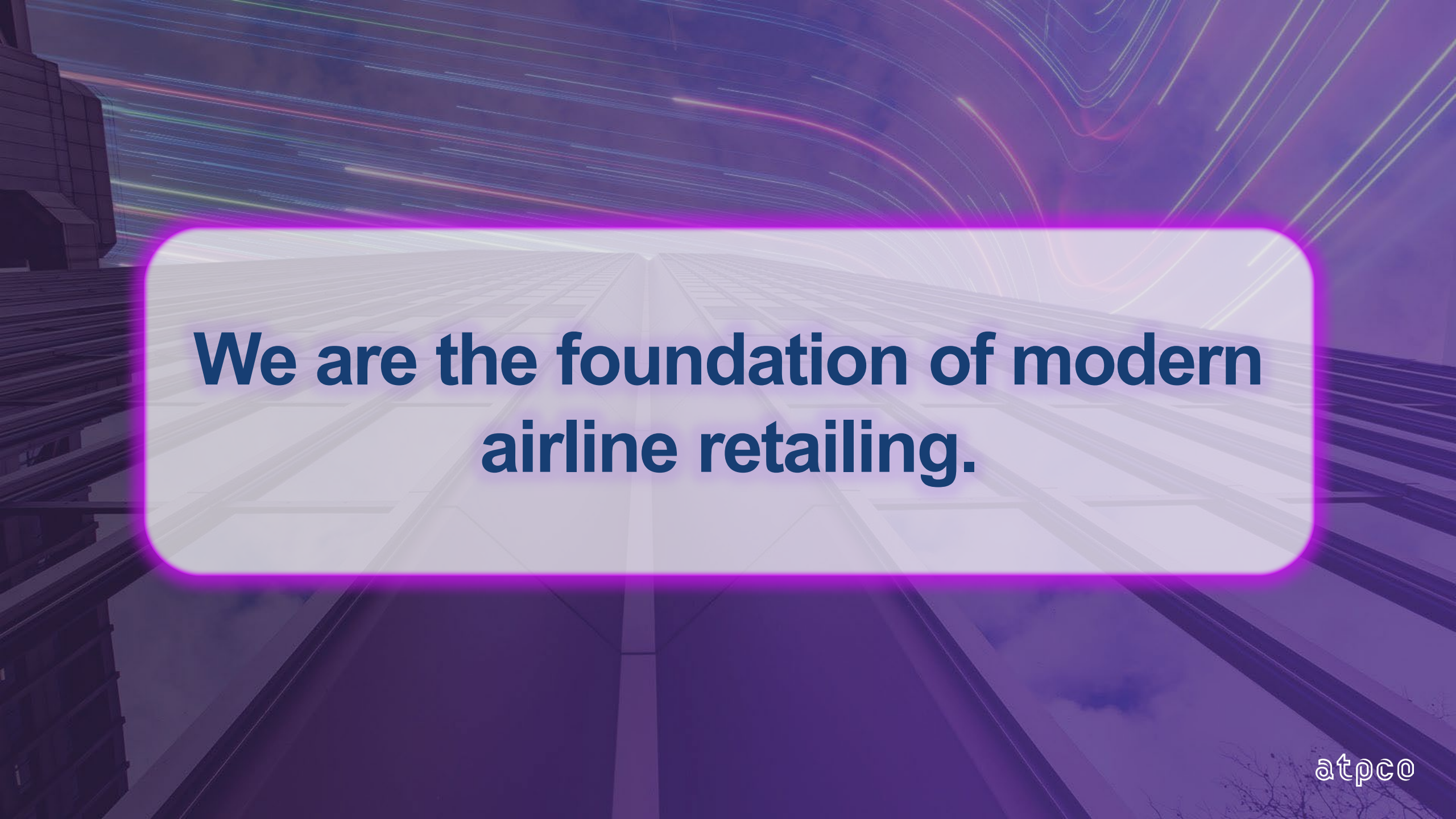
- Single Instruction via IATA
- All Airlines have online Access via ATPCO FareManager
- Run as a combined Service and combined Revenue Share (10 country subscription)
- VAT on Ancillaries Viewer
- IATA RFP for Calculator

Phase 2

2026

Single entry,
Industry TTFC Calculator

Grow new services
& deliver industry cost savings



**We are the foundation of modern
airline retailing.**