

IT solutions for the travel industry

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F.InsTT

Agenda

- ETTSA
 - About us and Mission.
- EU Transport White Paper
 - CRS Code of Conduct & TAP TSI
 - Italy Case study
- The Well Connected Traveller
- Be Smarter Connected Businesses
- IARO Tech WG Proposal



About ETTSA

- Founded in 2009
- Representing the independent travel distribution industry in Europe
- Members include Global Distribution Systems (GDS), Online Travel Agents (OTA) and Travel Data Suppliers.

Nominated for
Association of
The Year at the
European Public
Affairs Awards
2011

amADEUS
Your technology partner

Sabre Holdings

Travelport

Expedia

ebookers.com

Associate Member
eDreams

opodo

lastminute.com

Supporting Partners

ATPCO **OAG**

ETTSA's Mission

“To raise awareness of the benefits provided to consumers by technology providers and travel distributors in the travel sector chain and to work with consumers groups, industry representatives and policy makers to promote fair access, choice and transparency in the world of travel distribution.”

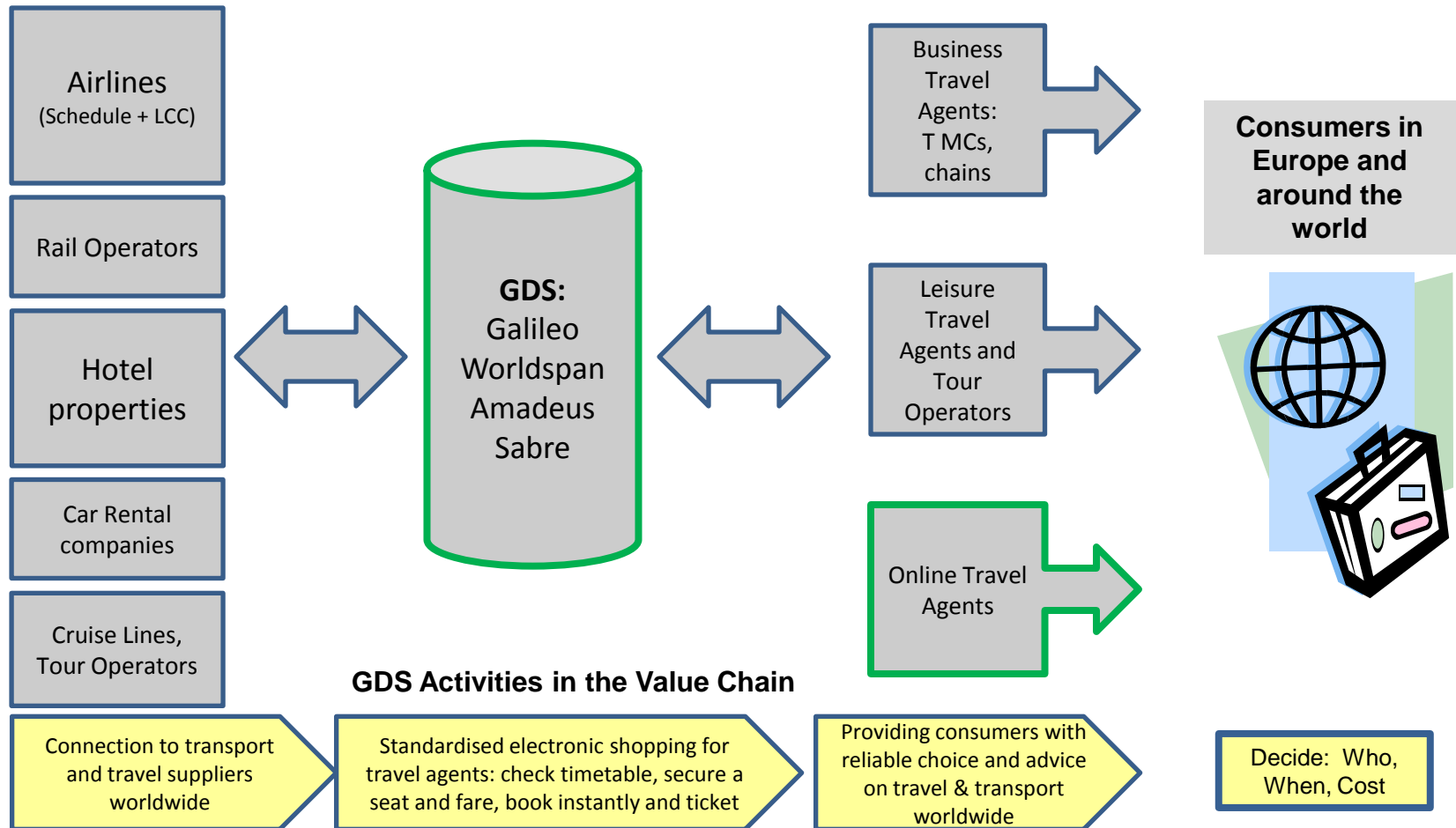
How?

- Engaging with policy makers
- Through providing insight
- Motivating new development

ETTSA encourages and supports full transparency, fair competition and consumer choice in the Travel distribution chain whilst enabling suppliers opportunities to distribute their products widely, creatively and at low cost.



Overview: ETTSA Members providing consumer choice in the travel & transportation value chain



 ETTSA Members

EU Transport Policy (Regulation, Investment and Standards)
underpinned by Passenger Rights Regulations 2007 (PRR)

Change to CRS Code of Conduct

GDSs Comply with the following EC Mandate.

1 - Regulation (EEC) No 2299/89 of 24 July 1989

- Driven by neutrality and consumer choice

2 – Amendment 48 to Regulation (EEC) No 2299/89
effective **31 Mar 2009**

Amendments includes:

- Addition of Rail Suppliers in the primary display and change of selection ranking criteria for rail operators where a rail or rail / air connecting service is available.
- Provision of Passenger information related to EU blacklisted aircraft
- Information related to Flight CO2 data
- Rules governing Ordering of pricing displays
- Rules relating to personal data



The Regulators: New Data Standards

CRS Code of Conduct

Engage with policy makers

Now a legal requirement to show rail or rail/air on primary GDS displays.

Example - GDS Principal Display between London and Paris

```
MON 16FEB09 LONDON AREA /PARIS AREA 16/0926 16/2359
1 LCY ORY 0945 1210 @AF5021 C9 D9 Z9 F1 09 Y9 S9 B9 RC K9#AR8C*E
2 XQE XPG 0959 1323 9F9014 J9 CC DC Z9 IC GC SC Y9 BC HC#TRNB E
3 LHR CDG 1015 1230 AF1081 C3 D2 Z2 F1 02 YL SL BL RC KL#321C*E
4 QQS XPG 1023 1353 9F9020 JC C7 DC ZC IC GC SC YC BC HC#TRNB E
5 LHR CDG 1125 1345 @QF3413 J9 C9 DC IC UC YL BL HL KL ML#320C*E
6 LHR CDG 1125 1345 BA 308 J9 C9 DC RC I9 YL BL HL KL ML#320C*E
7 LCY ORY 1200 1420 @AF5129 C9 D9 Z9 F1 09 Y9 S9 B9 RC K9#AR8C*E
8 LHR CDG 1250 1500 AF1281 C6 D5 Z4 F1 04 Y9 S9 B9 RC K9#321C*E
>A*·
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Equipment codes

Must include rail or rail / air service.

IATA has over 600 3 letter station codes.

Entry: LON / PAR (*City Pairs*)
XQE: Ebbsfleet, Kent
XPG: Gard Du Nord
QQS: St. Pancras

QQP: Paddington
XVQ: Venice Santa Lucia
45.26.19N
012.19.36E

Geo code



EU Transport Policy (Regulation, Investment and Standards) underpinned by Passenger Rights Regulations 2007 (PRR)

EU Transport White Paper

Sustainable Future for Transport – the EU is moving towards an integrated, technology-led and user friendly system.

- Key Drivers
 - Keep Europe moving.
 - Rail Liberalisation to increase competition plus high-quality, end-to-end services without restrictions of national bordersor protection of current suppliers.
 - Construction of a safe, modern integrated hi speed railway network (refer TEN-T)
 - Passenger Rights legislation (2007)
 - Common Technical Interoperability standards to improve customer choice.
 - Reduced CO2 emissions (Greening).
- Administration
 - **The European Railway Agency was set up by the Commission to help create the integrated railway area by reinforcing safety and supporting the development of interoperability data standards (TAP TSI) across associated transport modes (air, coach etc)**
- TAP TSI Stakeholders:
 - DG MOVE, The European Rail Agency (ERA), UIC, CER, ETTSA ,ECTAA.

The 3rd Railway Package
Proposals include
Passenger Rights and
Opening Up
Passenger Transport
Market

All RU's
have to
comply
with TAP

EU Transport Policy (Regulation, Investment and Standards) underpinned by Passenger Rights Regulations 2007 (PRR)

EU Transport White Paper

Opening
Competition

Rail
Liberalisation

TEN-T
Projects

Trans European
Network - Transport

Presentation &
Data Exchange
Standards

CRS CoC
&
TAP TSI

Rail / Air
Steps towards
Integrated
Information &
Ticketing

Interoperable
Intermodality

EU WG3

The Regulators: New Data Standards

TAP TSI

- **What is TAP TSI?**

- Stands for Telematic Applications for Passengers Technical Specification for Interoperability drafted by the European Rail Agency and EU 27 Member States.
- Became law 1Q 2011.
- It is supported by DGMOVE and the 2011 EU Transport White Paper

EU grant to cover WG travel costs

- **What will Phase 1 do?**

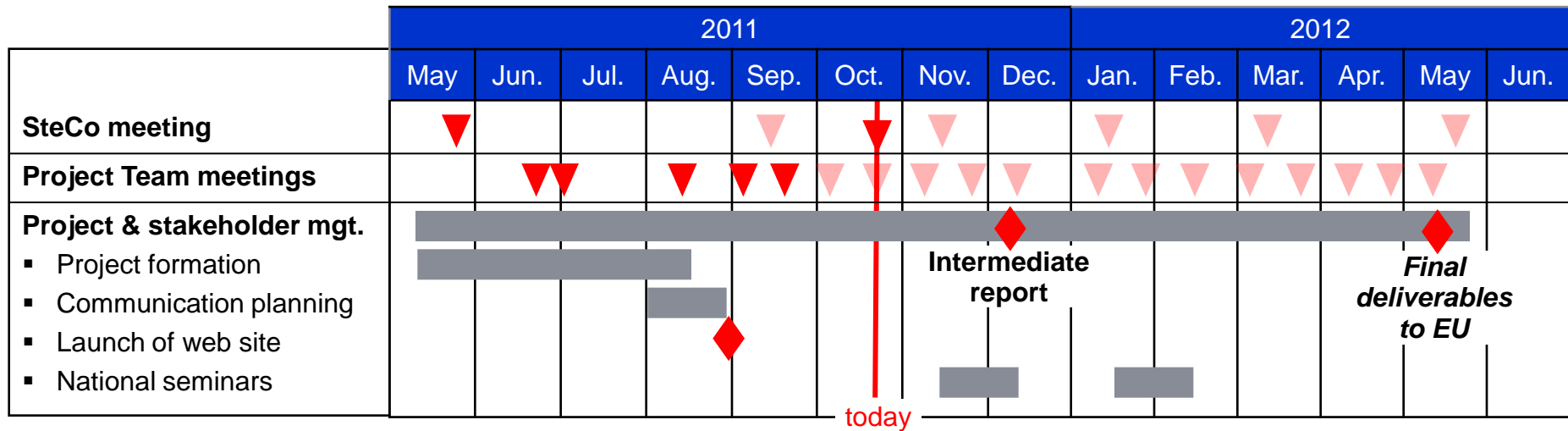
- Establish a common standard for rail operators to exchange data!

• TAP TSI creates a binding legal document for railway undertakings, infrastructure managers and 3rd parties (ETTSAs Members) covering common data exchange standards for Reservations, Fulfillment, Station Information, Security, Reduced Mobility, Information Diffusion and Access Conditions.

- TAP TSI is designed to enable rail to rail. For example Rail Operators will be required to adopt common station codes similar to IATAs City and Airport Codes which will improve timetabling, tariff management and pricing.

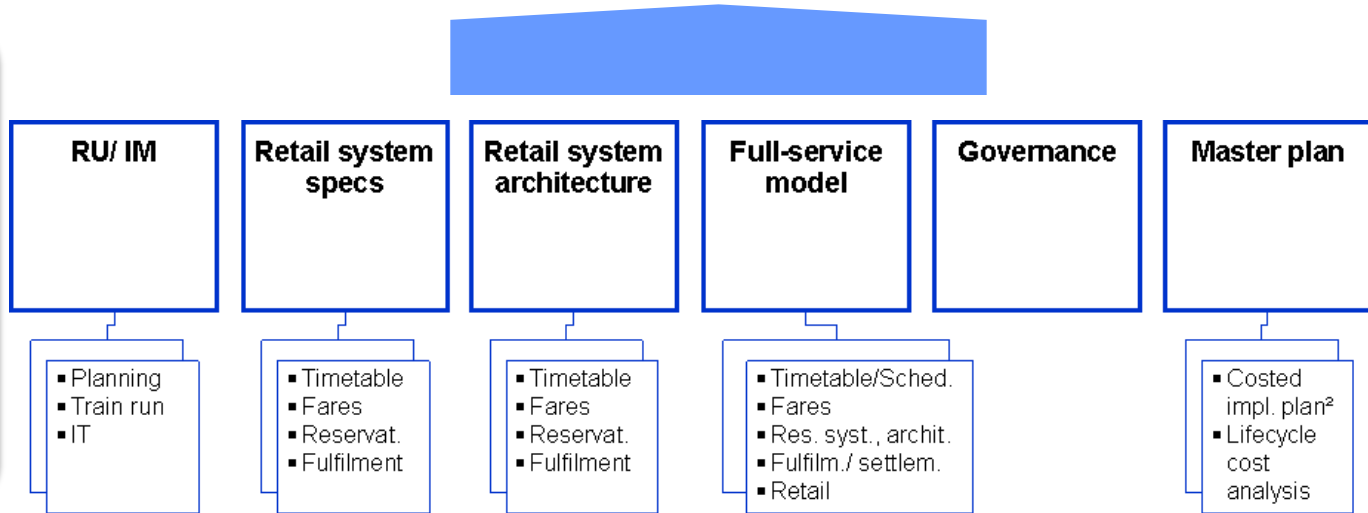


TAP TSI timeline overview: All activities geared to submitting the intermediate report by 8 December and the final deliverables by 13 May 2012

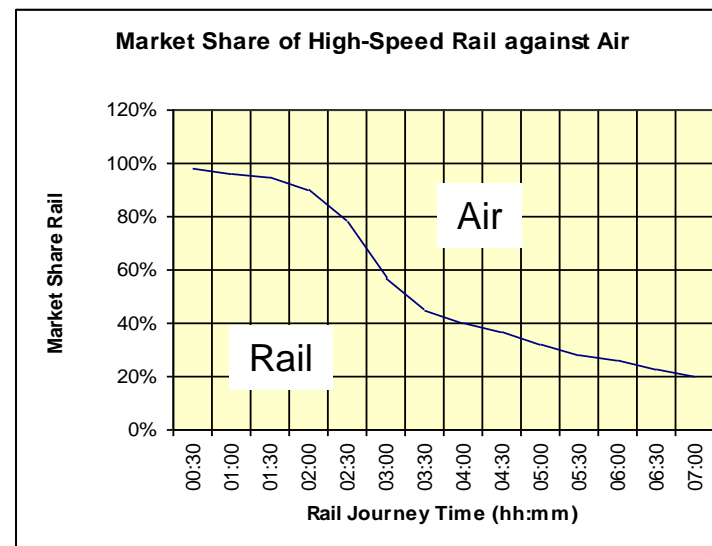
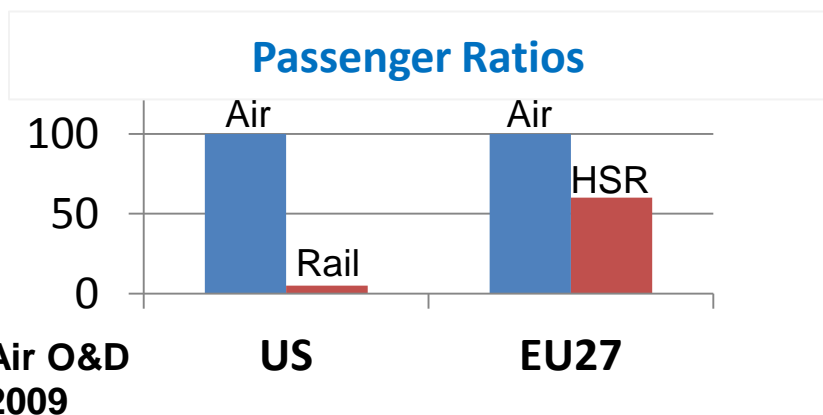
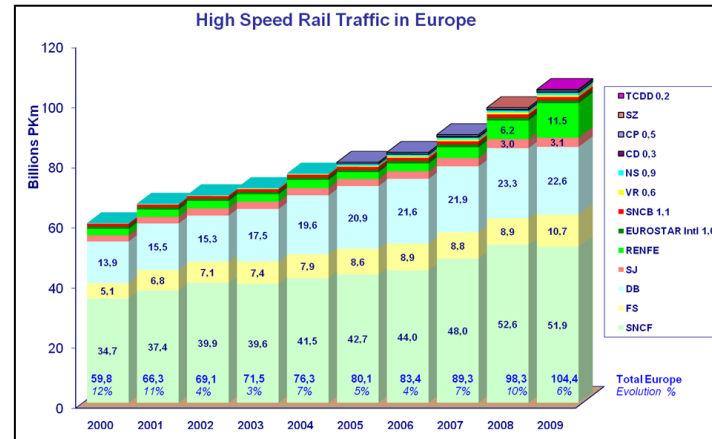
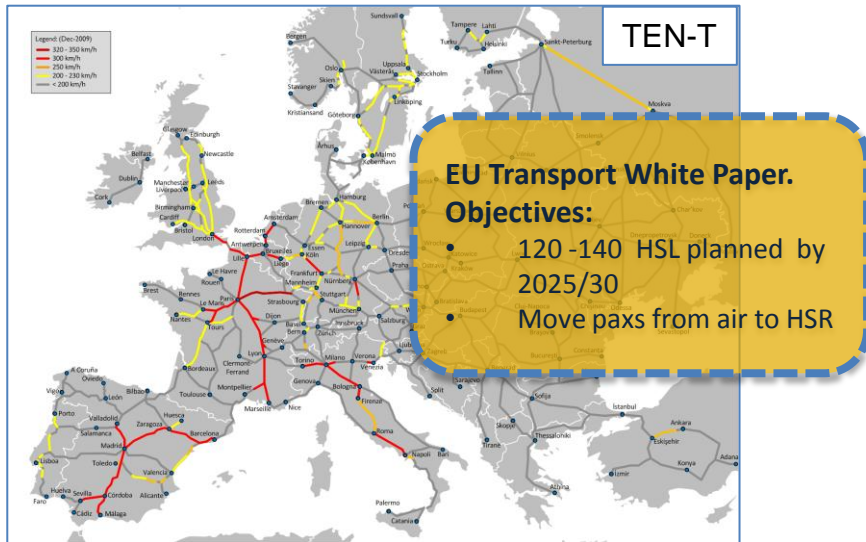


Project organisation with a team of railway and ticket vendor representatives and supporting Expert Groups

- UIC
- CER
- ETTSA
- ECTAA

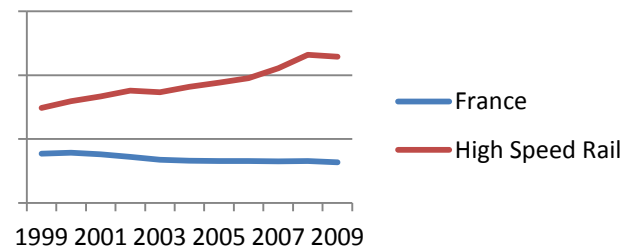
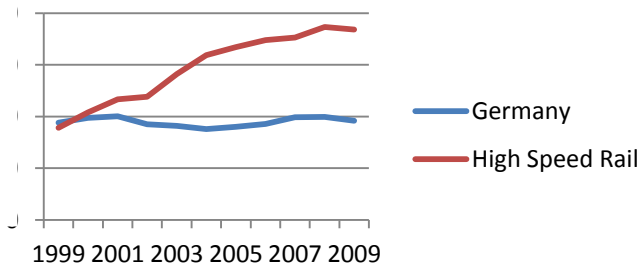
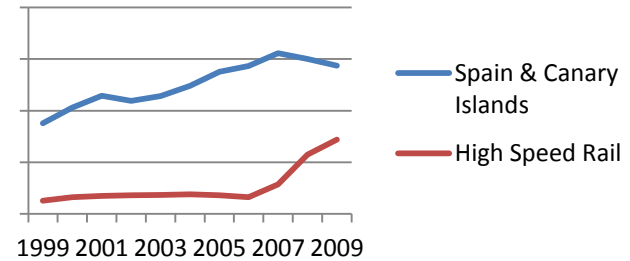
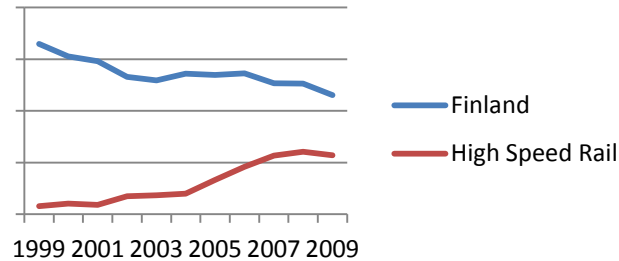
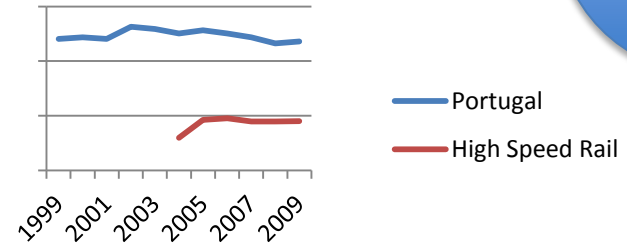
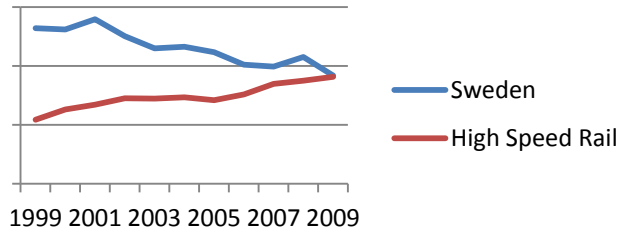


Rail Growth direct and airport connections



EU HS Rail and domestic air since 1999

Rail / Air
Codeshare
services exist
in many
places now.



Italian Hi Speed Trains operated by Train Italia Frecciarossa division.



Frecciarossa trains with a million passengers a month run on the high speed line connecting

The offer

Milan – Rome – Milan: 68 daily connections:

- 28 Frecciarossa, no stop take 2 hours and 59 minutes;
- 30 Frecciarossa, stopping at Bologna and Florence, take 3h30';
- 4 Frecciarossa, only one stop in Milan Rogoredo, take only 2h45';
- 10 Frecciarossa from Milan Porta Garibaldi and Milan Rogoredo to Rome;
- 2 Frecciarossa stop at Piacenza, Parma, Reggio Emilia and Modena.

Milan – Naples - Milan: 37 daily connections:

- 4 Frecciarossa, stopping at Milan Rogoredo, take 4 hours and 30 minutes;
- 7 Frecciarossa, stopping at Rome Termini, take 4 hours and 25 minutes;
- 24 Frecciarossa stopping at Bologna Centrale, Florence Santa Maria Novella, Salerno);
- 4 Frecciarossa, starting from Milan Porta Garibaldi e Milan Rogoredo;

Turin – Rome – Turin: 14 daily connections.

- 10 Frecciarossa connect Turin to Rome in about 4h30'. The train stop in Milan;
- 4 Frecciarossa stopping at Milan Centrale only, connect Turin to Rome in about 4h30';
- 3 Frecciarossa, stopping at Milan Centrale , Bologna, Florence Santa Maria Novella.

Bologna – Florence - Bologna: 46 daily connections:.

Rome – Naples - Rome: 40 daily connections in 1hr10'.

Florence/Bologna – Malpensa Airport : 4 daily connections

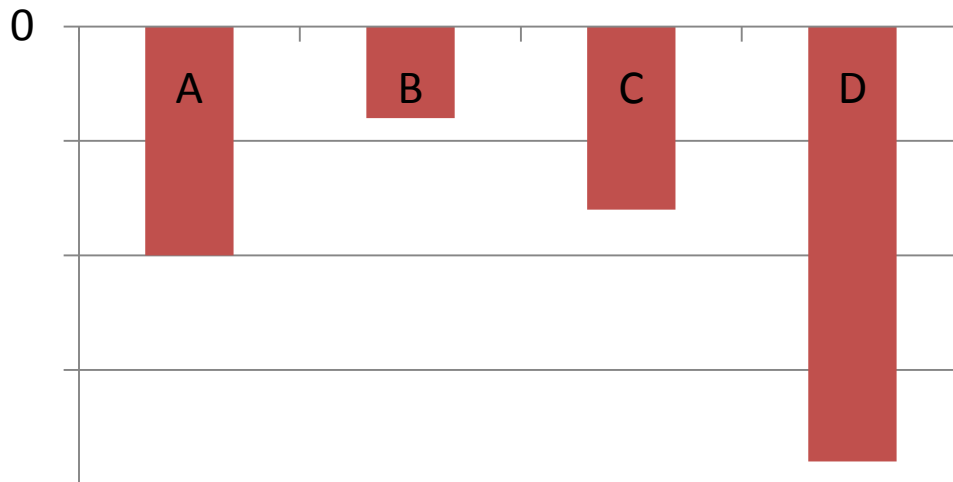
Connections			
From	To	Stop	
Milano Porta Garibaldi	Torino Porta Nuova		0h55'
Milano Centrale	Torino Porta Nuova		1h03'
Milano Centrale	Bologna Centrale		1h05'
Milano Centrale	Firenze Santa Maria Novella		1h45'
Milano Rogoredo	Roma Tiburtina		2h45'
Milano Centrale	Roma Termini	NO STOP	2h59'
Milano Centrale	Roma Termini	Bologna - Firenze	3h30'
Napoli Centrale	Roma Termini		1h10'
Napoli Centrale	Firenze Santa Maria Novella		3h00'
Napoli Centrale	Bologna Centrale		3h47'
Napoli Centrale	Milano Centrale	Roma	4h25'
Napoli Centrale	Milano Centrale	Roma-Firenze-Bologna	4h55'
Torino Porta Nuova	Roma Termini		4h30'
Torino Porta Nuova	Napoli Centrale		5h37'
Bologna Centrale	Firenze Santa Maria Novella		0h37'



Case Study - ITALY

4 city pairs where HSR is now a competitor

MIDT % changes. Based on 2009 YTD



	A	B	C	D
HSR Journey Time	2.45 hrs	1.10 hrs	3.30 hrs	3.00 hrs
HS trains Per day	68	40	26	6

Possible causes:

- Economic downturn
- Disintermediation
- Affect of Co2
- Something else.....

Lack of connected business info

Caused:

- Through service Visibility
- Overall price (interline)
- Overall service



The Well Connected Traveler



The Modern Traveler



Advice Seekers:

- ✓ Others experiences are important in the decision process
- ✓ Comparison analysis is more the norm
- ✓ Know where to look and how to search
- ✓ 5 click rule
- ✓ Want information on the move
- ✓ Share a common language

tripadvisor®
get the truth. then go.™

Advice Givers:

- ✓ Travellers are now journalists
- ✓ Experience sharers

Well Connected:

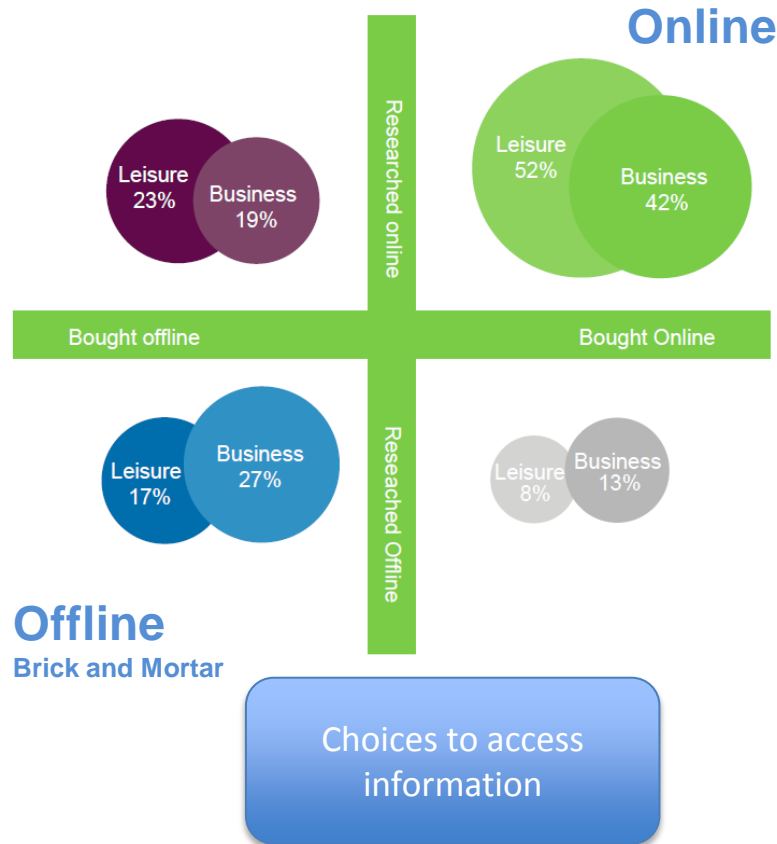
- Social Media
- Search Engines
- Online marketing
- Online LBP
- IM



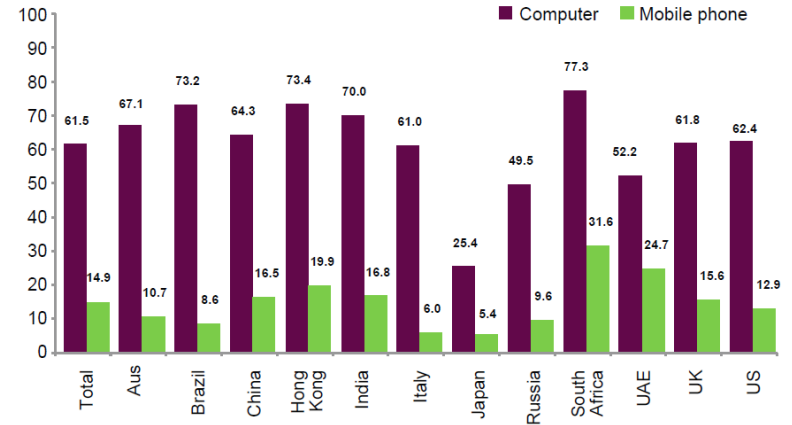
The Well Connected Traveler



Online Versus Offline Bookings



Percentage of people who visited a social networking site when planning their trip



Percentage of payment transactions by payment type

	Total	Aus	Brazil	China	Hong Kong	India	Italy	Japan	Russia	South Africa	UAE	UK	USA
Credit card	46%	52%	50%	32%	60%	33%	40%	57%	10%	53%	60%	40%	65%
Cash	27%	17%	24%	46%	30%	30%	18%	37%	72%	14%	26%	8%	6%
Debit card	12%	17%	12%	1%	2%	17%	4%	0%	7%	15%	5%	40%	22%
On-line payment transfer system	4%	4%	2%	14%	2%	6%	4%	2%	3%	11%	2%	2%	1%



Current Rail / Air Sales examples

Onsite Sales

Roaming Airport Staff



Ticket Office / Machines



Remote Sales

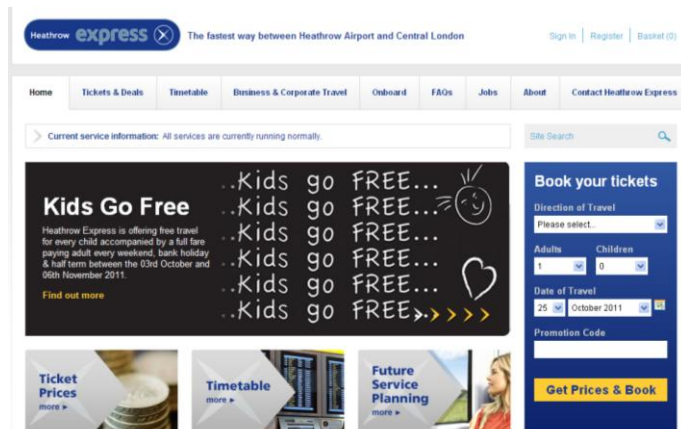
Air and / or Rail Codeshare (typical CRS output)

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Window 1
THU 22DEC11 COLOGNE /FRANKFURT 22/1681 22/2359 GKGAL
1 OKL FRA 1755 1851 @LH 379 J9 C9 D9 Z9 Y9 B9 M9 U9 H9 G9#1CEC*E
2 OKL FRA 1855 1951 @LH 381 J9 C9 D9 Z9 Y9 B9 M9 U9 H9 G9#1CEC*E
3 OKL FRA 1929 2013 @DF 342 F4 A4 PC Y9 B9 H9 K9 M9 L9 U9#1RNC**
4 OKL FRA 1957 2051 @LH 383 J8 C8 D8 Z8 Y8 B8 M8 U8 H8 G8#1CEC*E
5 CGN HAM 1630 1730 LH 2811 J9 C7 D7 Z7 Y7 B7 M7 U7 H7 G7#73C*E
6 FRA 1820 1935 LH 25 J9 C7 D7 Z7 Y7 B7 M7 U7 H7 G7#321C*E
7 CGN MUC 1900 2005 LH1993 J9 C6 D5 Z9 Y9 B9 M9 U9 H9 G9#320C*E
8 FRA 2100 2210 LH 125 J9 C6 D5 Z9 Y9 B9 M9 U9 H9 G9#321C*E
>A*
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- Airport travel services the consumer wants are largely sold separately
- No standard exists to link service providers
- Consumer can find the rail/air service fragmented with multiple payment points and little advance info
- Consumers in one country find it difficult to book rail services in another at best price.

Direct.com



How do airports and airport users compete with increasing number of direct Hi Speed Rail services?



Being Smarter



In the Hands of Travelers and Technology

The “Well Connected Traveler” has emerged, demanding information and services that facilitate a truly personalised travel experience – **the opportunity now is to provide connected business information to the consumer or retail service provider.**

Being Smarter by being better connected

Smart travel suppliers and their business partners are responding with technology-enabled capabilities that deliver against the growing and developing consumer requirements.

Suppliers should broaden thinking from vertical to horizontal thinking providing breadth and depth in online and offline connected service information.



IARO Tech Working Group Proposal

IARO is proposing the formation of a sub Tech Working Group to consider improving the information services between airline and rail operators in support of the EU initiative on intermodality.



Connected Businesses



Tech WG proposal

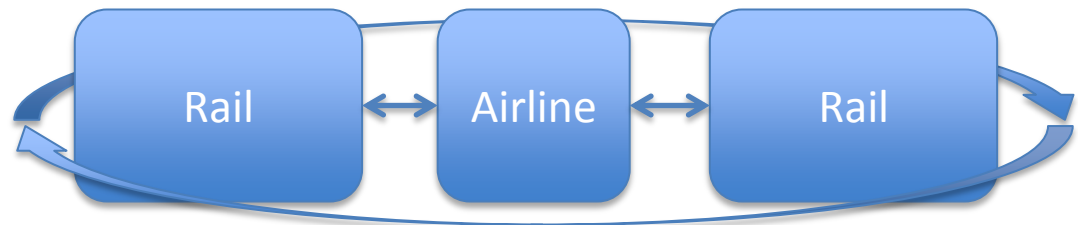
Possible Terms of Reference

1. Represent local airport service transport providers and airport members.
2. Development recommendations of Common Data Standards that support accurate presentation of travel information across multiple service, data providers and airport hubs.
3. Development of Universal API standards that handle multimodal content and electronic sales.
4. Association Rep at EU WG3 to develop connected business IT thinking / mandates.
5. Support Airport Rail Operators increase remote sales and reduce costs.

ETTSA supports the proposal to form an IT WG to work with organisation members and EU on the delivery of rail/air common data standards to improve remote online and retail sales.

**It's about better Information,
not technology**

“Help the Well Informed Traveller meet
Connected Businesses”



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