

There has been a lot of talk in recent years about the growth in online cargo bookings, and how this is changing the way the air cargo industry does business. More and more carriers are building their own web booking portals, adapting off-the-shelf solutions, and building direct links with forwarders' systems to provide direct access to rates and bookings. Some are also using the new generation of third-party booking portals, which publish multiple carriers' airfreight rates and enable bookings.

So where are we today? How many bookings are made online, instead of by phone? Is this digital trend impacting the adoption of eAWBs? And do forwarders like this newer way of working?

近年有不少討論關於網上空運訂艙平台的發展，將對空運業的營運模式帶來什麼改變。愈來愈多航空公司正建立自己的專屬網上訂艙平台，採用現成的解決方案，與貨運代理客戶的系統建立直接連繫，讓客戶即時了解空運價格及預訂艙位。另外亦有些航空公司採用以由第三方提供、詳列多間航空公司艙位價格及設有訂艙功能的新一代網上訂艙平台。

今天，網上訂艙平台的發展如何？目前有多少預訂是透過網上平台，而非經電話進行？此數碼化趨勢會否提升電子空運提單（eAWB）的使用率？貨運代理是否歡迎這種新營運模式？

網上訂艙 突破傳統

BOOKING ONLINE:

CHANGING
TRADITIONS



Brendan Sullivan, IATA Global Head of Cargo, says the percentage of online bookings depends on the market. Growth-wise, carriers have told IATA of 10% penetration in 2019, 20% in 2020 and 40% in 2021; he says this growing use of portals will impact rates: "Rates will be more reactive to market conditions and capacity. Based on historical booking activity and current demand, airlines can adapt rates more rapidly. Portals will allow airlines to reach new markets and create new or specialised distribution channels."

Airlines' own portals "give airlines more control: they can set up special channels for key accounts with negotiated conditions"; while third party platforms "are currently mostly limited to general and market rates, which is a small part of the overall rate availability."

Will growth in online bookings help the industry reach its goal of paperless supply chains? Brendan believes so: "Online booking processes will change the internal culture from manual to automated. Once the commercial process is digitalised, there will be pressure on invoicing, settlement, dispute, claims and accounting processes to digitalise further. Each digitalised process will trigger the digitalisation of another."

He believes online bookings will drive digitalisation more effectively than eAWB: "Airlines that are successful in their online booking strategy will see an impact on their commercial results. This wasn't the case with eAWB which had an operational impact more than a financial one."

"Our economy is increasingly digitalised and data is a valuable asset. Any development that increases efficiency through digitalisation also generates new data that allows economic actors, including airlines and their supply chain partners, to anticipate and respond to opportunities and challenges."

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Brendan Sullivan
Global Head of Cargo, IATA
IATA 全球貨運主管

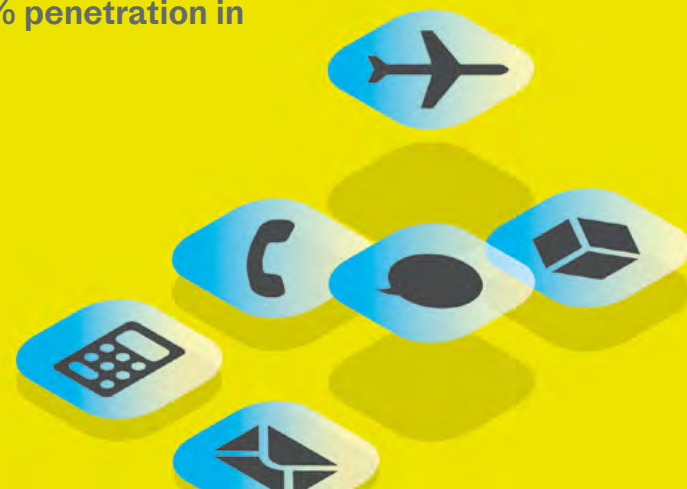
IATA (國際航空運輸協會) 全球貨運主管 Brendan Sullivan 表示，網上訂艙比率視乎地區而有所不同。根據航空公司向 IATA 提供的資料顯示，網上訂艙的普及率在 2019 年只有 10%，2020 年則上升至 20%，2021 年更達到 40%。他認為網上訂艙平台使用率的增長，將影響空運價格。「市場狀況和載運力是影響價格的主要因素，航空公司可以根據過往的預訂情況及市場目前的需求而快速調整價格。網上平台將能讓航空公司開拓新市場，建立全新或專門的銷售渠道。」

Brendan 續指：「航空公司自設的網上訂艙平台，能賦予它們更大的主導權：它們可以為主要客戶設立特別銷售管道，以提供專屬優惠。」而 Brendan 認為第三方訂艙平台「目前大部分只提供一般的市場價格，而這只是整體供應價格的一小部分。」

究竟網上訂艙的增長，能否協助業界實現無紙化供應鏈的目標？Brendan 相信是可以的：「網上訂艙流程將會推動業界從人手處理轉型至自動化，改變內部的營運文化。隨著商業交易流程逐步數碼化，將帶動發票開具、帳目結算、處理爭議、索償以及會計等作業程序進一步數碼化。每項數碼化流程，將推動另一個程序進行數碼化。」

Brendan 認為網上訂艙比電子空運提單能更有效推動數碼化：「成功推行網上訂艙策略的航空公司，將能看見其帶動業績上的增長。然而，有別於網上訂艙，電子空運提單對營運方面的影響大於財務上。」

隨著經濟日益數碼化，數據亦成為了一項重要的資產。任何透過數碼化來提升效益的發展項目，亦同時帶來新數據，讓航空公司及其供應鏈合作夥伴等經濟參與者，透過數據作進一步預測和抓緊各種機遇和挑戰。」



Here to stay

持續發展

"Online booking plays an important role in our industry, and will become more popular because it enhances transparency, offers real time updates and creates cost savings."

「網上訂艙能提高透明度，提供實時更新的資料及節省成本，因此對空運業非常重要，相信未來亦會愈來愈受歡迎。」

Anna Lyytikäinen
Head of Product and Channel Management, Finnair
芬蘭航空產品及銷售渠道管理主管

Looking forward, Brendan predicts: "Portals are here to stay and are the future. The implementation of portals forces airlines to rethink their sales and approval processes. If there is excess capacity, the airline may need to increase face to face sales effort, but can do so within a new framework of pricing, negotiation and approvals."

Hactl's research among its carrier customers certainly echos strong support for online bookings. Finnair has developed its own platform, as Anna Lyytikäinen, Head of Product and Channel Management tells us: "Online booking plays an important role in our industry, and will become more popular because it enhances transparency, offers real time updates and creates cost savings." Finnair is already averaging 38% of all bookings online, with up to 42% in some months.

展望未來，Brendan 認為：「網上訂艙平台將持續發展，並推動航空公司重新考慮它們的銷售及批覆程序。假如出現艙位滯銷的情況，航空公司可能需要提供更多面對面的銷售渠道，然而這些都可以在這個新的定價、協商和批覆框架內進行。」

香港空運貨站 (Hactl) 進行了一項有關其航空公司客戶採用網上訂艙平台的問卷調查，結果顯示回覆的客戶都支持這種新平台。芬蘭航空自設網上訂艙平台，其產品及銷售渠道管理主管 Anna Lyytikäinen 表示：「網上訂艙能提高透明度，提供實時更新的資料及節省成本，因此對空運業非常重要，相信未來亦會愈來愈受歡迎。」目前，芬蘭航空的網上訂艙率佔其整體預訂量的 38%，某些月份更高達 42%。」

“Online booking systems typically provide capacity management functions to manage revenue and balance demand; and are beneficial for the industry as they enhance the customer experience.”

「網上訂艙平台通常具備艙位管理功能，以提升收益及平衡需求；更能提升客戶體驗，有助空運業發展。」

Steven Wong 黃毅民
Vice President for Transportation, Asia Pacific, UPS
UPS 亞太區運輸副總裁

“How we define its role and the strategy of pricing and space distribution will be critical issues for our success in this regard.”

「如何適當地使用網上訂艙平台，以及制定價格和艙位分配的策略，將會是我們能否成功善用這些平台的重要因素。」

Eddy Liu 劉得淶
VP of Cargo Sales, Marketing & Service, China Airlines
中華航空貨運處長

Steven Wong, Vice President for Transportation at UPS Asia Pacific says the company moved to an online booking system to improve business efficiency and space utilisation. Steven feels online booking capabilities will remain important if the market softens as “online booking systems typically provide capacity management functions to manage revenue and balance demand; and are beneficial for the industry as they enhance the customer experience”.

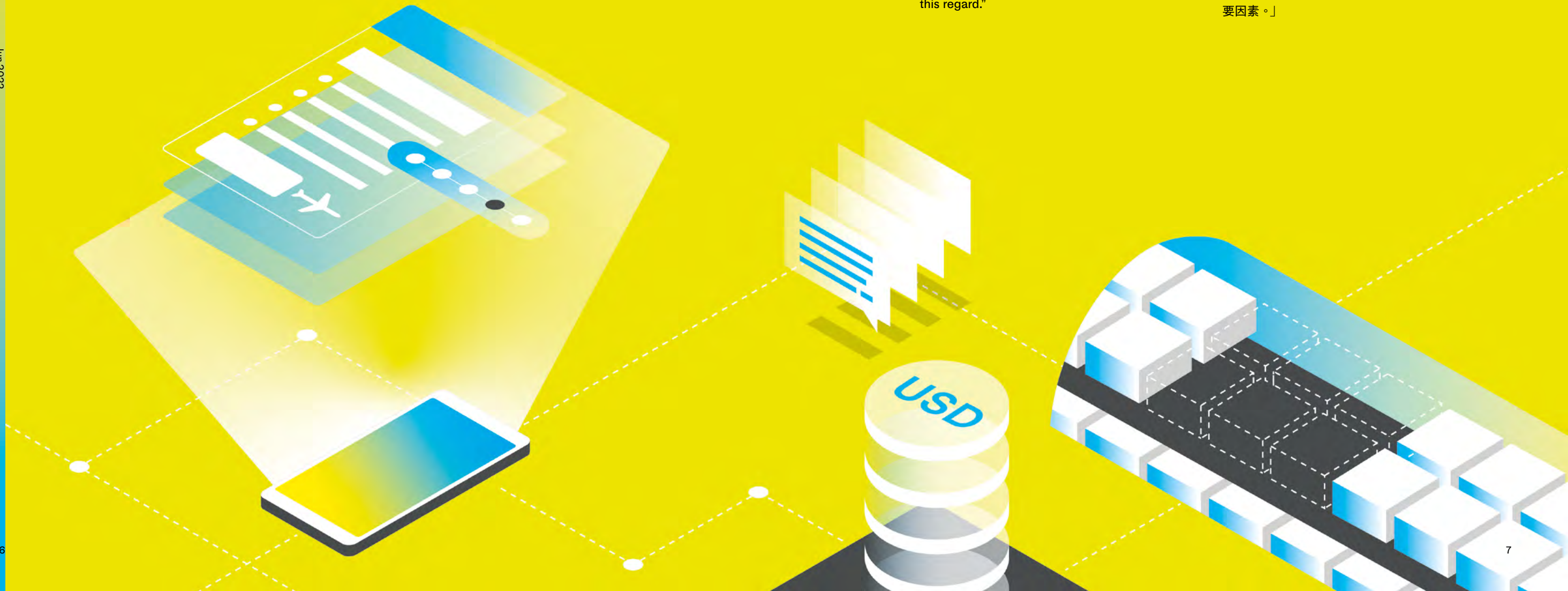
China Airlines' Eddy Liu, VP of Cargo Sales, Marketing & Service, says the airline is implementing a new cargo system and plan to add online booking platforms in future. “It’s convenient to customers to stay on one portal but make bookings with multiple carriers,” explains Eddy. But, ultimately, it will be led by customer preference, he adds: “Some customers develop their own software and avoid the third party portals. That will be the case for direct links to our portal.”

Eddy describes third party portals as “a friendly tool for forwarders to make multiple bookings with different carriers”, adding they can also help lift airlines’ market presence. He concludes: “We welcome it, but will also be cautious. How we define its role and the strategy of pricing and space distribution will be critical issues for our success in this regard.”

UPS 亞太區運輸副總裁黃毅民指，公司轉用網上訂艙平台是為了提升業務效益及艙位使用率。他認為即使市場回軟，網上訂艙仍然是一項十分重要的服務，因為「網上訂艙平台通常具備艙位管理功能，以提升收益及平衡需求；更能提升客戶體驗，有助空運業發展」。

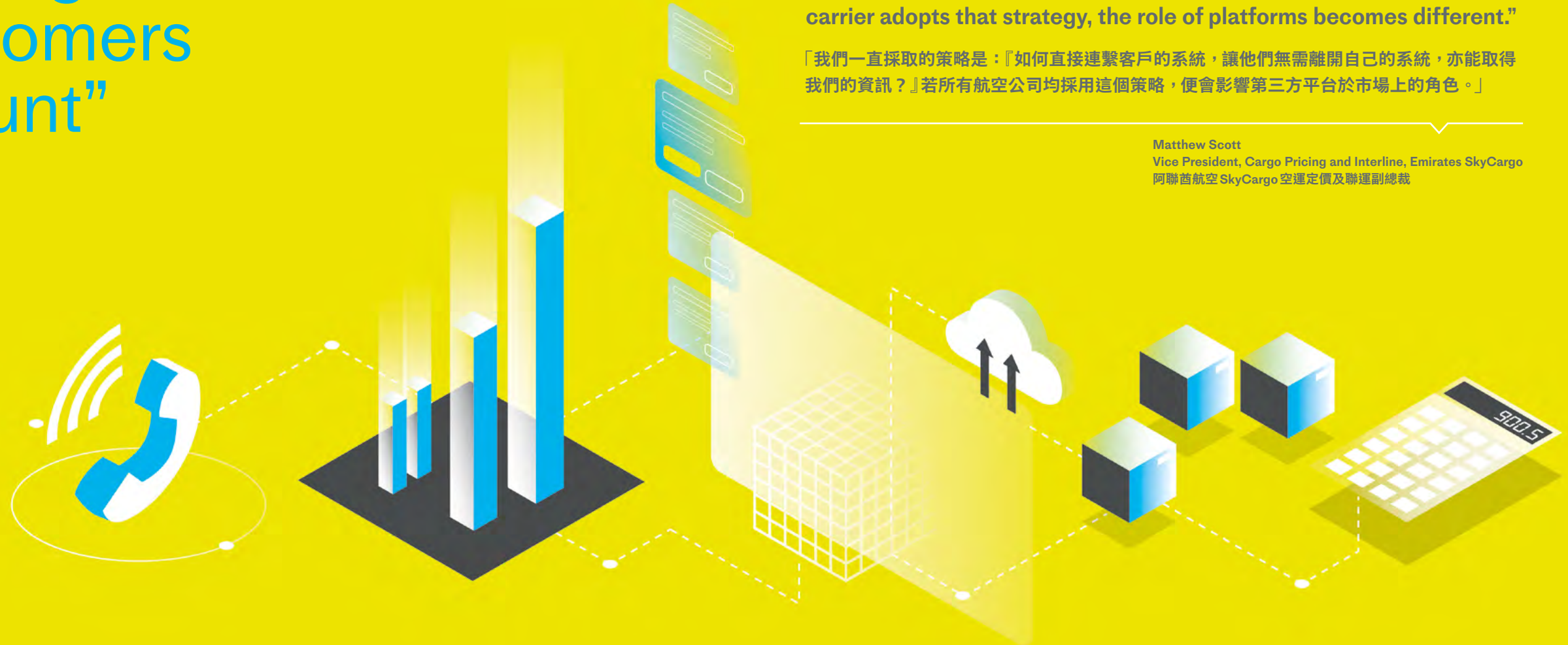
中華航空貨運處長劉得淶表示，他們目前正在推行一個全新貨運系統，並計劃在未來採用網上訂艙平台。劉得淶解釋說：「對客戶來說，透過使用一個平台便能預訂不同航空公司的艙位是十分方便的。」然而，他認為網上訂艙平台的使用量最終取決於客戶的使用偏好：「有些客戶為了避免使用由第三方提供的網上訂艙平台，會自行開發軟件，直接連繫到我們的平台。」

劉得淶形容第三方網上訂艙平台為「一套讓貨運代理能向不同航空公司進行多重訂艙的便利工具」，並補充指航空公司亦能透過這些平台提升其市場滲透率。他說：「我們樂於使用這些平台，但亦會保持謹慎。如何適當地使用網上訂艙平台，以及制定價格和艙位分配的策略，將會是我們能否成功善用這些平台的重要因素。」



Connecting direct with customers “paramount”

直接聯繫客戶至關重要



Emirates SkyCargo has a well-established online booking facility, e-SkyCargo, and is reviewing how to broaden its digital distribution channel mix, says Vice President, Cargo Pricing and Interline, Matthew Scott. “We are watching closely the development of third party platforms and in discussion with key customers to ensure we take their views onboard as we develop our own strategy.”

“We made the decision that connecting direct with customers was paramount and wanted to do that before using third party platforms, hence our decision to partner with WiseTech through the CargoWise platform. We’re currently not connected to any third party platform but we are in discussions with a number of vendors and plan to make a decision in the near future.”

Matthew says online bookings levels are dictated by whether certain booking types can be made online. “As Hong Kong is a block space allocation (BSA) market, Hong Kong has very high online bookings, as we do have that facility on our e-SkyCargo platform.”

Matthew acknowledges that a third party platform creates a market place, but customers still have to operate outside the platform in their own system. “Our strategy has been ‘how do we connect directly so they don’t have to jump out of that system to get our information?’ If every carrier adopts that strategy, the role of platforms becomes different.

“Third party platforms have a unique proposition at the moment, but where it’s going in the future is anybody’s guess. Everyone is trying to control their costs: if there’s a better, cheaper way of accessing capacity then everybody will go to that. Emirates has conducted several pieces of research into how forwarders want to book and there is no consensus. It varies by customer and also within a customer: you get a different response from senior and booker levels.”

“Our strategy has been ‘how do we connect directly so they don’t have to jump out of that system to get our information?’ If every carrier adopts that strategy, the role of platforms becomes different.”

「我們一直採取的策略是：『如何直接連繫客戶的系統，讓他們無需離開自己的系統，亦能取得我們的資訊？』若所有航空公司均採用這個策略，便會影響第三方平台於市場上的角色。」

Matthew Scott
Vice President, Cargo Pricing and Interline, Emirates SkyCargo
阿聯酋航空 SkyCargo 空運定價及聯運副總裁

阿聯酋航空 SkyCargo 具備一套完善的網上訂艙系統「e-SkyCargo」，而且正檢視如何進一步擴展其數碼銷售渠道。空運定價及聯運副總裁 Matthew Scott 表示：「我們正密切觀察第三方平台的發展，並與主要客戶討論有關事宜，以確保我們的發展策略能滿足他們的需要。」

「我們認為與客戶直接聯繫至關重要，故希望在採用第三方平台前能夠先達到此目標。因此，我們已決定與慧諮環球 (WiseTech) 合作，利用其 CargoWise 系統直接為客戶提供訂艙服務。我們目前尚未連接任何第三方平台，但已與不同平台進行商議及研究，並計劃於短期內會決定發展方向。」

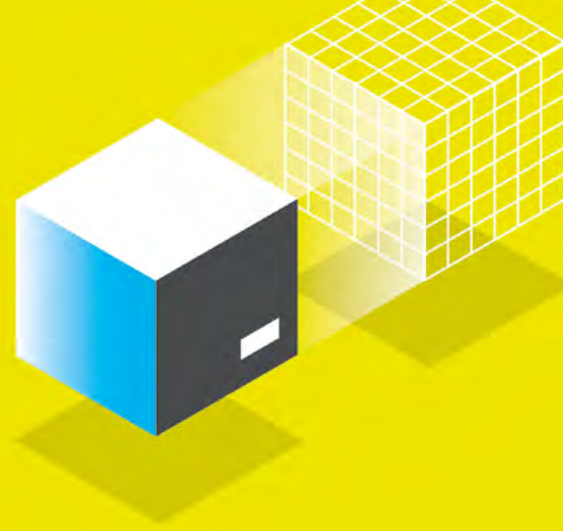
Matthew 表示，網上平台是否能為客戶提供不同類型的訂艙服務，將會影響它們的預訂交易數量。「由於香港空運市場以包板協議為營運基礎，而我們的 e-SkyCargo 系統能配合此類型客戶的需要，因此我們在香港的網上訂艙率非常高。」

Matthew 承認第三方平台開拓了一個新市場，但客戶在使用這些平台之外，仍需要在自己的系統裡進行操作。「我們一直採取的策略是：『如何直接連繫客戶的系統，讓他們無需離開自己的系統，亦能取得我們的資訊？』若所有航空公司均採用這個策略，便會影響第三方平台於市場上的角色。」

「目前第三方平台擁有獨特的發展優勢，但無人能確實預測其前景。每間公司都嘗試控制成本：如果有一個更完善和便宜的平台能取得到載運量和艙位資料，大家必定樂於採用。阿聯酋航空針對貨運代理的理想預訂方法，進行了一些研究，但目前仍未有一致的結果。預訂方法的偏好，因不同客戶公司，以至其內部各階層人員而有著差異：高級人員與負責預訂的前線人員分別有不同的要求。」

Portals potential threat to GSSAs

對 GSSA 構成潛在威脅



With the help of WebCargo Qatar Airways is now generating up to 48% of its bookings via e-channels and is now considering expanding to other portals. “With the portal we are open 24/7,” declares Chief Officer Cargo, Guillaume Halleux.

Guillaume feels third party portals may be a potential risk for General Sales and Service Agents (GSSA) “as WebCargo already offers payment functionalities, removing the need for Bank Guarantees and AWB stock management”.

Online bookings have progressed above expectations for Qatar Airways, with customers more receptive than anticipated. “It is so much easier for a forwarder to type in shipment details and have instant access to dozens of airlines and flights, than calling multiple carriers,” he continues.

Guillaume is a strong advocate for third party portals, asserting: “This is a tidal wave. For the first time outsiders are stepping up to digitalise our industry, and will succeed where airlines have had limited success. It finally opens the path to full digitalisation. These companies shake the tree of our industry, and it’s about time!”

But what do agents think about this quiet revolution? A Hactl poll of the Hong Kong freight forwarder community showed mixed responses, but some revealed they are conducting 70% or more of business online.

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「網上預訂平台為空運業邁向全面數碼化開關了一個新方向，這正是推動業界數碼化的最佳時機！」

Guillaume Halleux
Chief Officer Cargo, Qatar Airways
卡塔爾航空貨運總監

在 WebCargo 網上平台的協助下，卡塔爾航空的網上訂艙率已佔其整體預訂量的 48%，並正考慮擴展至其他平台。貨運總監 Guillaume Halleux 表示：「透過網上訂艙平台，我們能全天候處理預訂交易。」

Guillaume 認為第三方平台對銷售和服務總代理 (GSSA) 構成潛在風險：「WebCargo 現時已能提供付款功能，去除銀行擔保及空運提單庫存管理的需要。」

網上訂艙的發展超出了卡塔爾航空的預期目標，客戶的接受程度亦出乎意料地良好。Guillaume 續指：「貨運代理透過平台輸入貨件資料，即時取得數十間航空公司及航班的資料，較以往需致電不同航空公司方便得多。」

Guillaume 非常支持採用第三方網上訂艙平台，他斷言：「這是一個勢不可擋的浪潮。這是首次由第三方推動空運業數碼化，而這將推動航空公司在獲得有限成功的領域取得更大成就。網上預訂平台為空運業邁向全面數碼化開關了一個新方向，這正是推動業界數碼化的最佳時機！」

貨運代理對這場悄然的變革又有何看法呢？Hactl 邀請了香港的貨運代理參與其意見調查，結果顯示它們有着不同的看法，而部分回覆的代理表示它們約有 70% 的業務是在網上進行的。

“... so I doubt if online booking is suitable for the Hong Kong and China market as we play a totally different game from other countries.”

「……香港和中國內地市場的營運模式與世界各地截然不同，因此我無法肯定網上訂艙平台是否完全適合香港和中國內地市場。」

Kirk Hsu 徐志文
Deputy Managing Director, CTI Logistics (HK) Co., Limited
泰盛空運有限公司副營運總裁

“Inability to adjust BSA rates according to demand and seasonality was also a shortcoming.”

「平台無法根據需求和季節性價格波動為採用包板協議的客戶調整收費，亦是其不足之處。」

Cliff Sullivan 蘇立夫
Deputy Managing Director, Easy-Way Logistics (HK) Limited
通程物流(香港)有限公司副營運總裁

Kirk Hsu, Deputy Managing Director of CTI Logistics (HK) Co., Limited, however, pointed to some disadvantages: “If a shipment is booked on a flight without space, some online booking systems give confirmation on the next available flight, but some don’t, so we need extra manpower to search for the next available flight. I believe the ideal system should be organised in an integrated way that allows customers to check all information and perform bookings through a single platform. We also have to contact them through other means to switch to another flight, and ask the carrier to void the AWB because it’s already in their system and we are unable to use the number again unless the carrier manually releases it.”

CTI says some systems were not flexible enough to accommodate flight cancellations and local transportation or restriction issues, during the pandemic. Some also cannot accommodate rate fluctuations for BSA customers like them. These issues may be peculiar to Hong Kong, Kirk admits: “The idea of online booking is awesome for its convenience to both parties. However, due to the lack of flexibility and comprehensive functions of some platforms, it causes us inefficiency, so I doubt if online booking is suitable for the Hong Kong and China market as we play a totally different game from other countries.”

Cliff Sullivan, Deputy Managing Director of Easy-Way Logistics (HK) Limited also voiced concerns about discrepancies between online space confirmation and actual flight schedules, with changes to space allotments due to flight cancellations or schedule changes not being updated in some systems. Inability to adjust BSA rates according to demand and seasonality was also a shortcoming, in his view.

然而，泰盛空運有限公司副營運總裁徐志文指出網上平台的一些不足：「假如客戶預訂了一班已經載滿貨物的航班，有些網上訂艙系統能安排及確定下一班有可供艙位的航機，但部分系統卻未有這些功能，因此我們需要安排額外人手查看其他艙位。我認為理想的平台應該整合全面的艙位和航班資料，以及具備訂艙功能，讓客戶只需透過一個平台便能完成所有工序。我們亦需透過其他方式聯絡航空公司以安排另一航班運送貨物，並取消已記錄在其系統中的空運提單。除非航空公司以人手取消該空運提單，否則我們無法再次使用該提單號碼。」

泰盛空運亦表示，部分系統在疫情期間不能靈活地因應航班取消及當地交通或防疫限制，而作出調整。此外，有些系統亦無法因應價格波動，配合如它們一樣採用包板協議的客戶的要求。而這些可能只是香港獨有的問題，徐志文坦言：「網上訂艙是一個很好的概念，對各方都非常便利。但由於部分平台功能不足和缺乏彈性，反而有礙我們提升工作效率。香港和中國內地市場的營運模式與世界各地截然不同，因此我無法肯定網上訂艙平台是否完全適合香港和中國內地市場。」

通程物流(香港)有限公司副營運總裁蘇立夫亦對網上訂艙平台有所保留。他指部分系統未能及時因應航班取消或更改的航班時間表而更新資料，以至平台上提供的艙位確認資料與實際航班時間表有所出入。他認為平台無法根據需求和季節性價格波動為採用包板協議的客戶調整收費，亦是其不足之處。

Pieces of paper still flying around

仍需紙本文件

What might have seemed an obvious link between online bookings and the use of eAWBs has proven otherwise: some carriers report stations with high online bookings, but low online execution of AWBs. “They still pick up the phone and complete the execution manually,” one airline told us. “There are huge variances and no direct correlation: a lot of pieces of paper are still flying around!”

The third party platforms are understandably bullish about the future for their concept. **WebCargo**, part of **Freightos Group**, has 3,300 forwarders (including 19 of the global top 20) using its system for live rates and capacity information, and bookings. The company’s **Freightos rate management system** is charged for, but its eBooking platform is free for freight forwarders, while carriers pay a “negligible” fee per transaction.

WebCargo provides rates from some 250 airlines, with API feeds for rates and capacity, and booking capability, for around 40. **WebCargo** also has a number of GSSAs as customers.

Business growth is strong, reports **Eytan Buchman**, Chief Marketing Officer at **Freightos Group** and **WebCargo**, with “well into six-digit bookings every quarter”. **Freightos** announced 311% year-on-year growth in the first quarter of 2022, and CEO of **Freightos Group** and founder, **Zvi Schreiber**, says: “This quarter was further proof that cargo procurement is going digital. When we first started to offer air cargo eBookings on **WebCargo** in 2018, it was a curiosity. Today, it’s increasingly the norm.”

Eytan says freight forwarders benefit from faster access to rates, confidence in actual available capacity, and the ability to access dynamic rates that reflect market fluctuations. “For airlines,” he adds, “we offer broader reach to customers, easier distribution, analytics to improve revenue management, and even payment management.”

網上艙位預訂看似與使用電子空運提單息息相關，但事實未必如此：部分航空公司表示，它們有些航點的網上預訂量高，但電子空運提單的使用量率卻很低。一間航空公司與我們分享：「它們依然需要以電話和人手完成所有預訂工序。因此實際情況並不一致，而且兩者沒有直接關聯：許多工序仍然以紙本文件處理！」

第三方網上平台對它們所提出的概念發展前景，當然抱有樂觀的看法。**Freightos**集團成員 **WebCargo**，現時有達3,300間貨運代理商（包括全球20大代理商中的19間）透過它們的系統查看航空公司的實時價格和艙位資料，以及進行網上訂艙。該公司的 **Freightos** 空運價格管理系統需要收費，但其網上訂艙平台則免費供貨運代理使用，而航空公司只需為每單交易支付非常低廉的費用。

WebCargo 網上平台提供逾250間航空公司的空運價格，透過利用應用程式介面 (API) 提供空運價格及艙位資料，並提供約40間航空公司的艙位預訂功能。此外，**WebCargo** 亦有不少 GSSA 客戶。

Freightos 集團及 **WebCargo** 首席營銷官 **Eytan Buchman** 指，**WebCargo** 業務增長強勁，「每季的訂艙交易量均高達六位數字」。最近，**Freightos** 更宣布其2022年首季同比增幅達311%。**Freightos** 集團行政總裁兼創辦人 **Zvi Schreiber** 稱：「本季業績再度證明貨運採購數碼化已是大勢所趨。我們於2018年首次在 **WebCargo** 推出網上訂艙服務時，業界仍採取觀望態度，今天，這已逐漸成為一個趨勢。」

Eytan 指貨運代理透過網上訂艙平台，能更快速地查看空運價格，確保實際可用的艙位，以及獲取因應市場波動而不斷變化的實時價格。他補充指：「我們讓航空公司能接觸到更廣泛的客戶，以更方便和容易的方式進行銷售，以及透過市場分析，提升業務收益及付款方面的管理。」

“Business growth is strong, with well into six-digit bookings every quarter. **Freightos** announced 311% year-on-year growth in the first quarter of 2022.”

「**WebCargo** 業務增長強勁，每季的訂艙交易量均高達六位數字。最近，**Freightos** 更宣布其2022年首季同比增幅達311%。」

Eytan Buchman
Chief Marketing Officer, **Freightos Group** and **WebCargo**
Freightos 集團及 **WebCargo** 首席營銷官

Improved utilisation

提升艙位使用率

Why would an airline use **WebCargo**, if it already has its own online booking facility? **Eytan** responds: “One airline told us they aim to meet their customer wherever the customer is. In order to keep global trade moving seamlessly, it’s absolutely critical to provide seamless and transparent service wherever a customer prefers to do business.”

Eytan is unconcerned about the potential impact of any future softening of markets, as capacity returns to normal. During the pandemic “With fast changing rates and availability, digital availability became paramount. However, much like passenger travel, dynamic rates can introduce far better capacity utilisation. Dynamic prices and the improved utilisation they can introduce will likely guarantee that digital booking is here to stay.”

若航空公司已擁有自己的網上訂艙平台，為何還要利用 **WebCargo** 銷售艙位呢？**Eytan** 回應說：「一間航空公司告訴我們，它們希望能夠接觸到使用不同平台的客戶。為支持全球貿易無間斷地運作，航空公司必須能為客戶隨時隨地提供全面及具透明度的服務。」

隨著載運力回復正常水平，**Eytan** 並不擔心若市場再度放緩會為空運業帶來任何潛在影響。疫情期間，「價格和艙位供應量不斷急速變化，因此網上平台能提供實時價格及艙位資料變得十分重要。然而，就如客運業務一樣，動態定價能顯著地提升艙位使用率。動態定價和提升艙位使用率的功能，相信是網上訂艙平台持續發展的重要因素。」