Welcome, thank you for joining us today.

The event will begin shortly.
We start at 14:00/2pm.
Welcome back

Yanik Hoyles Director Distribution, IATA
SPEAKERS TODAY

Caroline Strachan
Managing Partner
Festive Road
(Moderator)

Tamura Goudarzi Pour
CCO & SVP Revenue Management & Distribution Hub Airlines
Swiss International Airlines
Lufthansa Group

Yanik Hoyles
Director Distribution
IATA

Paul Tilstone
Managing Partner
Festive Road
(Moderator)

Claudia Adams
Travel Manager
Allianz Technology SE

Scott Ward
Global Head Partnerships
CTM

John Bukowski
VP Content Acquisition
Amex GBT

Michel Rouse
VP Global Customer Solutions
FCM

Andrew Chase
Airline Partnerships
TripActions
Competition law guidelines

Do not discuss:

• Any element of prices, including fares or service charges
• Commissions
• Allocations of customers or markets
• Marketing plans, commercial terms or any other strategic decision
• Group boycotts
• Your relations with agents, airlines, system providers or other third parties
• Any other issue aimed at influencing the independent business decisions of competitors
# Contents

<table>
<thead>
<tr>
<th></th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The Importance of The Distribution Evolution in a COVID-19 restart context</td>
</tr>
<tr>
<td>2</td>
<td>Setting the context, hear from the Director Distribution, IATA</td>
</tr>
<tr>
<td>3</td>
<td>Case Study #1: Corporate Travel Management (CTM)</td>
</tr>
<tr>
<td>4</td>
<td>Case Study #2: American Express GBT</td>
</tr>
<tr>
<td>5</td>
<td>Case Study #3: FCM Travel Solutions</td>
</tr>
<tr>
<td>6</td>
<td>Case Study #4: TripActions</td>
</tr>
</tbody>
</table>
The Importance of The Distribution Evolution in a COVID-19 restart context

Tamur Goudarzi Pour
CCO Swiss & Senior Vice President
Revenue Management/Distribution Lufthansa Group Hub Airlines and Chair of the IATA Distribution Advisory Council (DAC)
The Importance of The Distribution Evolution in a COVID-19 restart context

Setting the context, hear from the Director Distribution, IATA

Case Study #1: Corporate Travel Management (CTM)

Case Study #2: American Express GBT

Case Study #3: FCM Travel Solutions

Case Study #4: TripActions
Setting the context

Yanik Hoyles, Director Distribution, IATA
Paul Tilstone, Managing Partner, Festive Road
TMC Case Studies

Caroline Strachan Managing Partner, Festive Road
# Contents

1. The Importance of The Distribution Evolution in a COVID-19 restart context

2. Setting the context, hear from the Director Distribution, IATA

3. **Case Study #1:** Corporate Travel Management (CTM)

4. **Case Study #2:** American Express GBT

5. **Case Study #3:** FCM Travel Solutions

6. **Case Study #4:** TripActions
CTM NDC Integration.

Scott Ward
Global Head of Partnerships

www.travelctm.com
Providing localised travel solutions to customers around the world.
Technology Hubs Strategy

Goal: Accelerate speed to market and tailor client development, in-region, for region.

Regional tech hubs.

<table>
<thead>
<tr>
<th>Region</th>
<th>Tech hub location</th>
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</thead>
<tbody>
<tr>
<td>ANZ</td>
<td>Sydney, Australia</td>
</tr>
<tr>
<td>EMEA</td>
<td>Hale, Europe</td>
</tr>
<tr>
<td>NA</td>
<td>Los Angeles, California</td>
</tr>
<tr>
<td>ASIA</td>
<td>Hong Kong</td>
</tr>
</tbody>
</table>

- Speed to market
  - Agile Methodology
  - Local decision making on priorities
- Influence technology development and direction through local engagement
- Ability to maximise all industry, supplier, customer and cultural in market requirements
- Not reliant on a 3rd party to drive our innovation
- **Global Peers - best practice sharing, leverage and collaboration**
CTM Content Factory is the core component of the CTM distribution architecture

Manages preferencing, decision logic, connection point of all inputs and outputs

Ensures ownership of our distribution and data flow and decision control for future changes
Thank you
&
QUESTIONS?
Go to the Q&A panel at the lower right side of your screen.
# Contents

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
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<tbody>
<tr>
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American Express Global Business Travel (GBT) is a joint venture that is not wholly owned by American Express Company or any of its subsidiaries (American Express). “American Express Global Business Travel,” “American Express,” and the American Express logo are trademarks of American Express and are used under limited license.
Topics for Discussion

• INTRODUCTION: WHAT WE ARE HEARING FROM CLIENTS, SUPPLIERS, INDUSTRY BODIES AND TECHNOLOGY PROVIDERS

• UPDATE ON SUPPLIER RETAILING

• UPDATE ON SUPPLIER MERCHANDIZING

• WRAP-UP/CONCLUSIONS
Introduction
Industry Overview

As the travel industry works through the impact of COVID 19, we are spending time with our customers, supplier and technology partners to understand impacts and how we can work together to deliver enhanced distribution.

- 85% - Need to Enhance OBT Display
- Corporate Contract evolution remains a top concern
- 67% - Ease of Servicing Improvements
- Duty of Care remains top focus
Traveler, Customer and Supplier needs are rapidly evolving and the distribution landscape is changing with them

<table>
<thead>
<tr>
<th></th>
<th>Travelers</th>
<th>Customers</th>
<th>Suppliers</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Corporate Consumer Grade Display</strong></td>
<td>Improved Shopping Experience</td>
<td>Show value of booking within program</td>
<td>Sell More, Value vs Price</td>
</tr>
<tr>
<td><strong>Access to Content</strong></td>
<td>Have confidence that best content will be in booking tool</td>
<td>Traveler has access to best fares, compare airline offers/content</td>
<td>More control over who sees what when</td>
</tr>
<tr>
<td><strong>Anytime Access</strong></td>
<td>Complete Channel Choice</td>
<td>Keep travelers happy and within program</td>
<td>Consistent Experience</td>
</tr>
<tr>
<td><strong>Data/Insights</strong></td>
<td>Know what I am entitled to, perks</td>
<td>Traveler Behavior, Supplier Savings</td>
<td>Traveler Behavior, Expanded Margins</td>
</tr>
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</table>
We are focused on four key areas to enhance our customers experience both from a program and traveler perspective.

**Shopping Experience**
- Partnership with Routehappy
- Consistent Experience Across all Connectivity
- OBT Partners
- Policy Enforcement doesn’t need to erode Traveler Experience

**Servicing**
- Enhanced OBT/Mobile capabilities
- Chat, Messaging
- Supplier Partnerships

**Cost**
- Corporate Contract Assistance/Support
- Cross Airline Offer Compare
- Avoid unnecessary fees or surcharges

**Content Quality, Availability**
- Unique Supplier Partnerships
- Aggregator Partners
- OBT enhancements
- Data Insights
Shopping Experience
Transport Results
Current search: DFW - Dallas/Ft.Worth International (TX), Wed, Oct 7 — LAS - Las Vegas McCarran Intl (NV), Fri, Oct 9

<table>
<thead>
<tr>
<th>Stops</th>
<th>Companies</th>
<th>Price</th>
<th>Airport/Station</th>
<th>Connections</th>
<th>CO₂ emission</th>
<th>Compliant only</th>
</tr>
</thead>
</table>

1. **American Airlines**
   - **11:45 AM (DFW)** to **12:31 PM (LAS)**
   - **2h 46m**
   - **Non-stop**
   - **Basic Economy**
   - **€128**
   - **Round Trip**

2. **American Airlines**
   - **11:45 AM (DFW)** to **12:31 PM (LAS)**
   - **2h 46m**
   - **Non-stop**
   - **Main Cabin**
   - **€197**
   - **Round Trip**

3. **American Airlines**
   - **10:35 PM (DFW)** to **11:21 PM (LAS)**
   - **2h 46m**
   - **Non-stop**
   - **Main Cabin**
   - **€197**
   - **Round Trip**

4. **American Airlines**
   - **2:50 PM (DFW)** to **3:39 PM (LAS)**
   - **2h 49m**
   - **Non-stop**
   - **Main Cabin**
   - **€196**
   - **Round Trip**

5. **American Airlines**
   - **7:10 AM (DFW)** to **8:00 AM (LAS)**
   - **2h 50m**
   - **Non-stop**
   - **Main Cabin**
   - **€196**
   - **Round Trip**

NDC Offers
What’s Next?

1. **Continued engagement and collaboration with customers** – Specific feedback and deliverables on airline retailing/experience

2. **Prioritize and assist all OBTs enhancing user experience and connectivity**

3. **Work with Airlines, Technology Providers to meet expectations on servicing and other requirements**
Q&A
Go to the Q&A panel at the lower right side of your screen.
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Case Study #4: TripActions
LIVE PRESENTATION IN PROGRESS

OBT video examples shown live/see recording
A story of successful collaboration

FCM - Amadeus - parexel
• NDC adoption happening at different speeds across the industry

• We needed a unified access for all content
  • Without major disruption to all of our integrated systems

• Active in Amadeus NDC [X] since start of 2019
  • Currently support several carriers live in our offline consultant platform

• Offline is good, but omni-channel is key
  • Extension of NDC [X] to Cytric is game changing
  • Book & Service
Omni-channel NDC servicing
• Choice for the booker/traveller
• Same content in all channels
• Seamless flow between self-service and assisted bookings

Demo scenario
1. OBT
2. Mobile App
3. Offline Servicing
Booking in Cytric
• All content aggregated in one place
• No disruption to booking flow
• Keep existing booking & servicing environment
• Collaboration in value chain
LESSONS LEARNED | WHERE CAN WE IMPROVE

- Availability through all OBTs
- New exciting content (more value add)
- Standardised application of NDC standard
- Improved performance of airline APIs
- Access to all content through common aggregators/distributors
FCM Marketplace

- Working with additional aggregators
- Provide access to content currently not in the GDS programmes
- Enhanced functionality: Order History
  - Access full order history (all additions / modifications / cancellations)
Corporate Travel Needs

Price Guarantee
- Facilitate pre-trip approval in a consistent way

Personalised Route Deals
- Focus on value, not just savings (experience & reporting)

Better disclosure of fare rules for bundles or ancillaries
- Travellers may be unaware when rules sometimes differ from the ticket

Technology Focus Areas

Airlines
- Differentiating their product, not their technology

Aggregators & Technology providers
- Connecting the content and delivering through all channels (including API)

TMC
- Focus on the user experience and not the plumbing
Go to the Q&A panel at the lower right side of your screen.
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OBT video examples shown live/see recording
IATA Virtual Business Travel Summit
June 18, 2020

Andrew Chase
Air Partnerships
A unified travel, payment & expense platform
TripActions Philosophy

*How we approach airline content*

**Customer & User First Mindset**

**Added Value** *(price + services)*

**Traveler Experience**
Building a diverse content marketplace

- Enhance existing direct connections to best serve clients in today’s environment
- Developing NDCs that align with customer growth
- Exploring new direct connect partnerships

and more coming soon...
Good afternoon, Tracy

[Flight search interface]
- **Flights**
- **Hotels**
- **Trains**
- **Cars**

**From**

**To**

**Wed, Apr 1** | **Anytime**

**Tracy Gao** | **Add Traveler or Guest**

**Any number of stops**

- **Personal trip**
- **Bill to Client**
- **Refundable Only**

[Company Travel Policy] | **Search**
TripActions & Lufthansa NDC

- Richer content
- More transparent pricing
- Access to ancillaries
- Personalized experiences through bundles
- More control for corporate buyers
Key Learnings

- Close collaboration with technology providers
- Clear definition of implementation scope
- Experiment with personalization
- Assess long-term support and servicing of the connection (updates, etc.)
Benefits to Corporates

Use Case: shopify

Access to ancillaries, better servicing, more robust booking experience and content parity leads to:

- Happier travelers and reduced noise
- Higher traveler adoption
- Better visibility into travel spend
- More bookings within travel policy perimeters
Q&A

Andrew Chase
Air Supply Lead

Christian Jobst
Head of Purchase Point for Corporate Travel
Thank You

Achase@TripActions.com
Go to the Q&A panel at the lower right side of your screen.
Closing

Claudia Adams, Travel Manager at Allianz & IATA Travel Manager Advisory Group
European Chair
Paul Tilstone, Managing Partner, Festive Road
Closing Remarks

Yanik Hoyles Director Distribution, IATA
Thank you, and see you soon!