What’s the market problem?

Customer Experience
• Is not consistent depending on where they search for travel and not rich when shopping through travel agents

Travel Agents
• Can’t easily access many airline products that are available on the airline direct websites

Airlines
• Don’t have the freedom to distribute their products across channels without being commoditized
What do airlines want?

Revenue opportunities
- Differentiation (product description)
- Merchandizing (ancillaries, fare families)
- Personalization (based on loyalty, preferences)
- Dynamic Offers (based on personalization and other features)

Cost savings
- Innovation & Competition
The solution is NDC

• Why NDC?
  – To modernize the way air products are retailed to travel agents, corporations and travelers

• What is NDC?
  – A travel industry-supported program for the development and market adoption of a new data transmission standard

• Who can benefit from NDC?
  – Full service and budget airlines
  – Technology providers and travel agents
  – Corporate buyers and travelers
Traditional Flight Distribution

Fares via 3rd party

Schedule via 3rd party

Availability
Airline

e-commerce engine

Global Distribution Systems

Travel Agents (TMC | OTA | Independent)

Travelers (Business | Leisure)
Airline Retailing in an NDC World
Today’s Shop Interface

Compare airlines mainly on price and schedule

Source: Expedia January 2019
Tomorrow’s shop interface

Enabled by NDC
Tomorrow’s shop interface

Enabled by NDC

Comparison shopping capability
NDC Program Update
NDC Certified Airlines

Americas
- Air Canada
- American Airlines
- Avianca Airlines
- Delta Air Lines
- GOL
- InselAir
- Taca International Airlines
- United Airlines
- WestJet

Europe
- Aegean Airlines
- Aer Lingus
- Aeroflot
- Air Austral
- Air France
- APG Airlines
- Austrian Airlines
- British Airways
- Brussels Airlines
- Condor
- CORTSAIR
- Finnair
- Flybe
- Iberia
- Iberia Express
- KLM
- Lufthansa
- Norwegian Air
- Olympic Air
- Onur Air
- S7 Siberia Airlines
- SunExpress Germany
- SunExpress Turkey
- SWISS
- TAP Air Portugal
- Thomas Cook Airlines
- Turkish Airlines
- Virgin Atlantic
- Vueling Airlines

Middle-East & Africa
- Emirates
- Etihad
- Ethiopian Airlines
- flydubai
- FlyEgypt
- Oman Air
- Qatar Airways
- Rotana Jet
- Saudia Arab Airlines

North Asia
- Air China
- Cathay Pacific Airways
- China Airlines
- China Eastern
- China Southern
- Colorful Guizhou
- EVA Air

Asia Pacific
- Korean Air
- Qantas Airways
- SilkAir
- Singapore Airlines
- T’way Air

Latest status as of January 2019 – For most up-to-date information check: www.iata.org/ndc-registry
NDC is “technically ready”

The Standard is ready for industrialization
- As plaudited by GDSs and technology providers

66 NDC Certified airlines
- Representing 60% of IATA member passengers boarded

66 NDC Capable technology providers
- Investing in NDC - Includes GDSs certified as Aggregators
The Value chain is committed

<table>
<thead>
<tr>
<th>Travel Management Advisory Group</th>
<th>Global Travel Management Executive Council</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amazon. Allianz. AstraZeneca.</td>
<td>American Express GBT.</td>
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<tr>
<td>Bechtel. Gov’t. of Canada. LEO</td>
<td>ATPI/Direct Travel. BCD Travel.</td>
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<tr>
<td>UBS. Veritas</td>
<td>FCM Travel Solutions</td>
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<tr>
<td>– and many more…</td>
<td>– and many more…</td>
</tr>
</tbody>
</table>

Working faster, together, to bring NDC to life
Corporate Buyers

See Opportunities with NDC and …

• Content
• Cost
• Control
• Customer Experience

...Envision the future of the TMC

• The TMC Value Proposition in a New Distribution Landscape

Together, Let’s Build Airline Retailing
Travel Agents

See NDC as an enabler and ...

- Better Customer Service
- Increased Productivity
- More Competitive

...have their reference architecture

Together, Let’s Build Airline Retailing
Thank you

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