

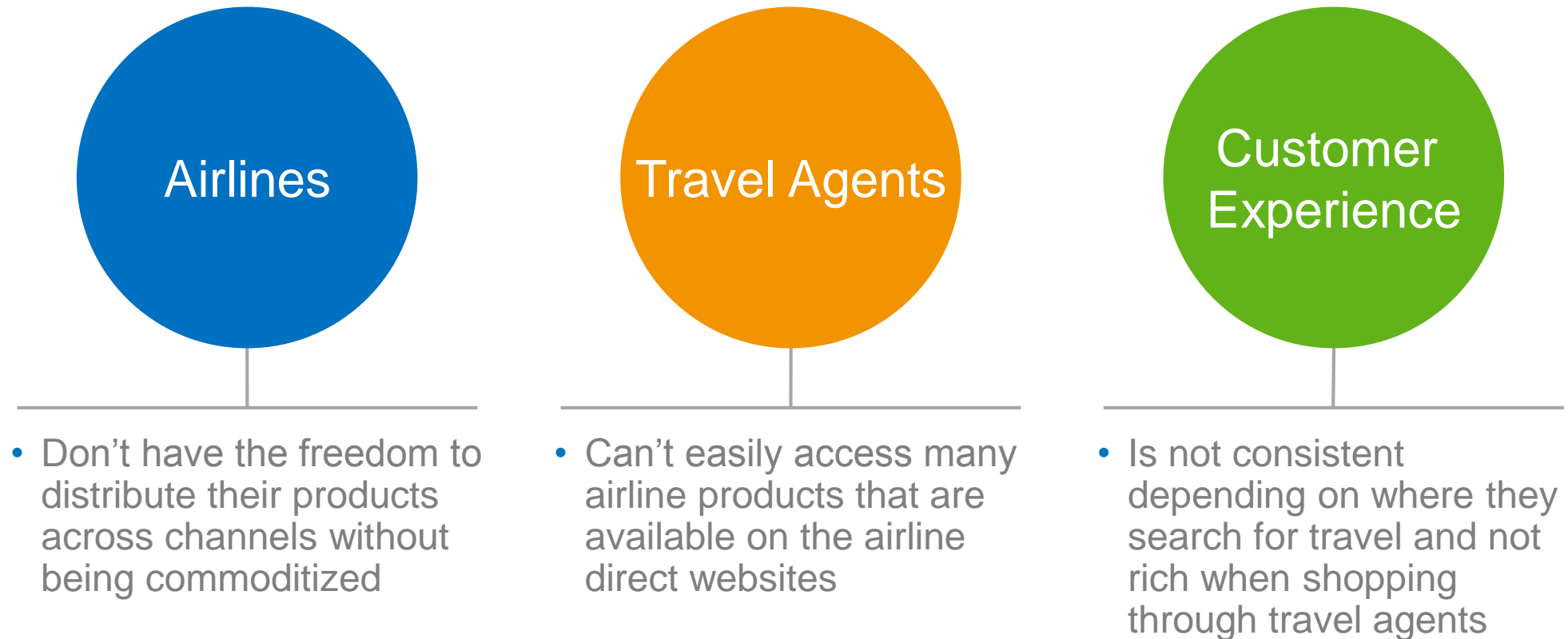
ATM & GENESYS

Digital Futures Summit

IATA - NDC Program Update
23rd April 2018



What's the market problem?



Together, Let's Build Airline Retailing

Why NDC?

- To modernize the way air products are being retailed to travel agents, corporations and travelers

What is NDC?

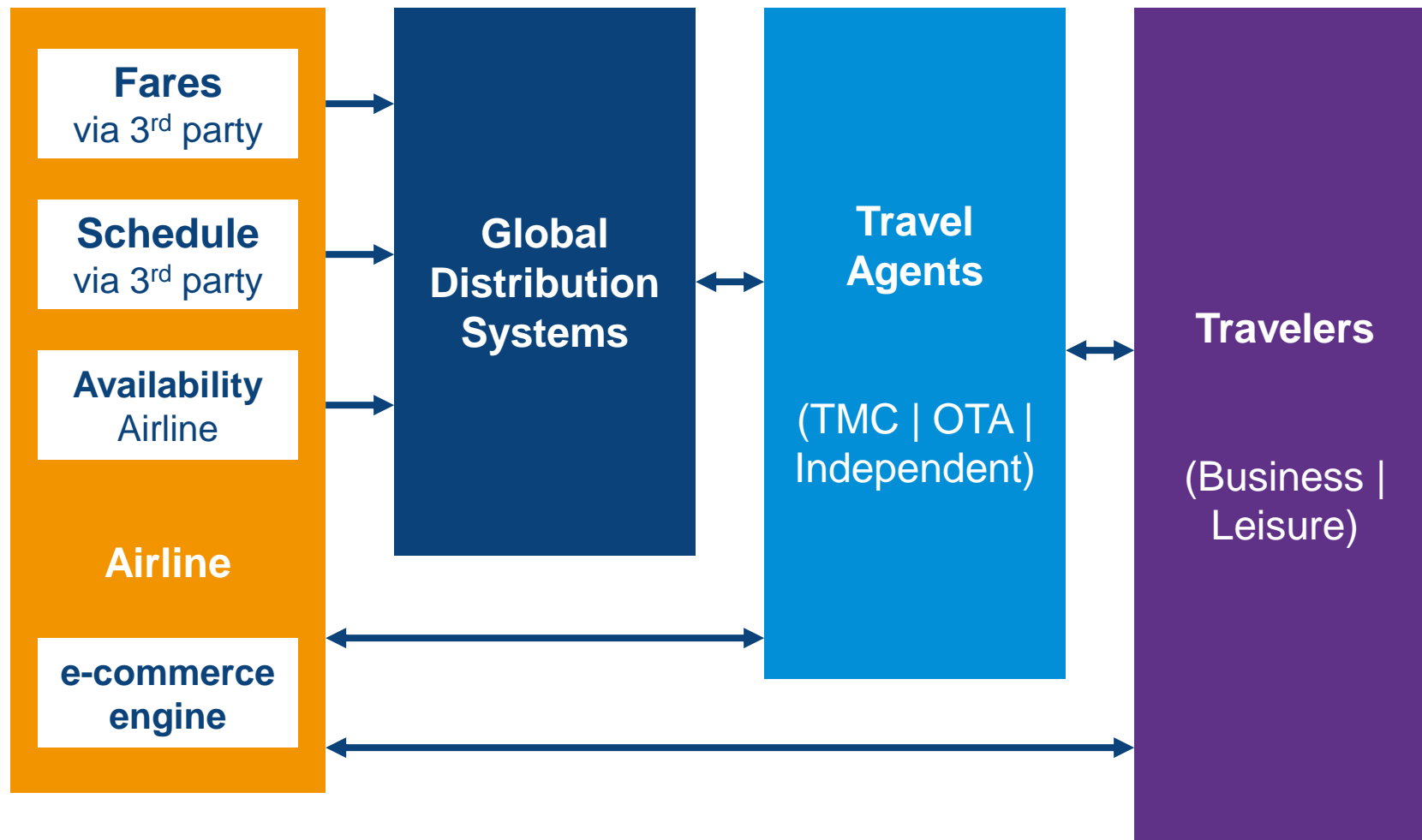
- A travel industry supported program for the development and adoption of a new data transmission standard

Who will benefit from NDC?

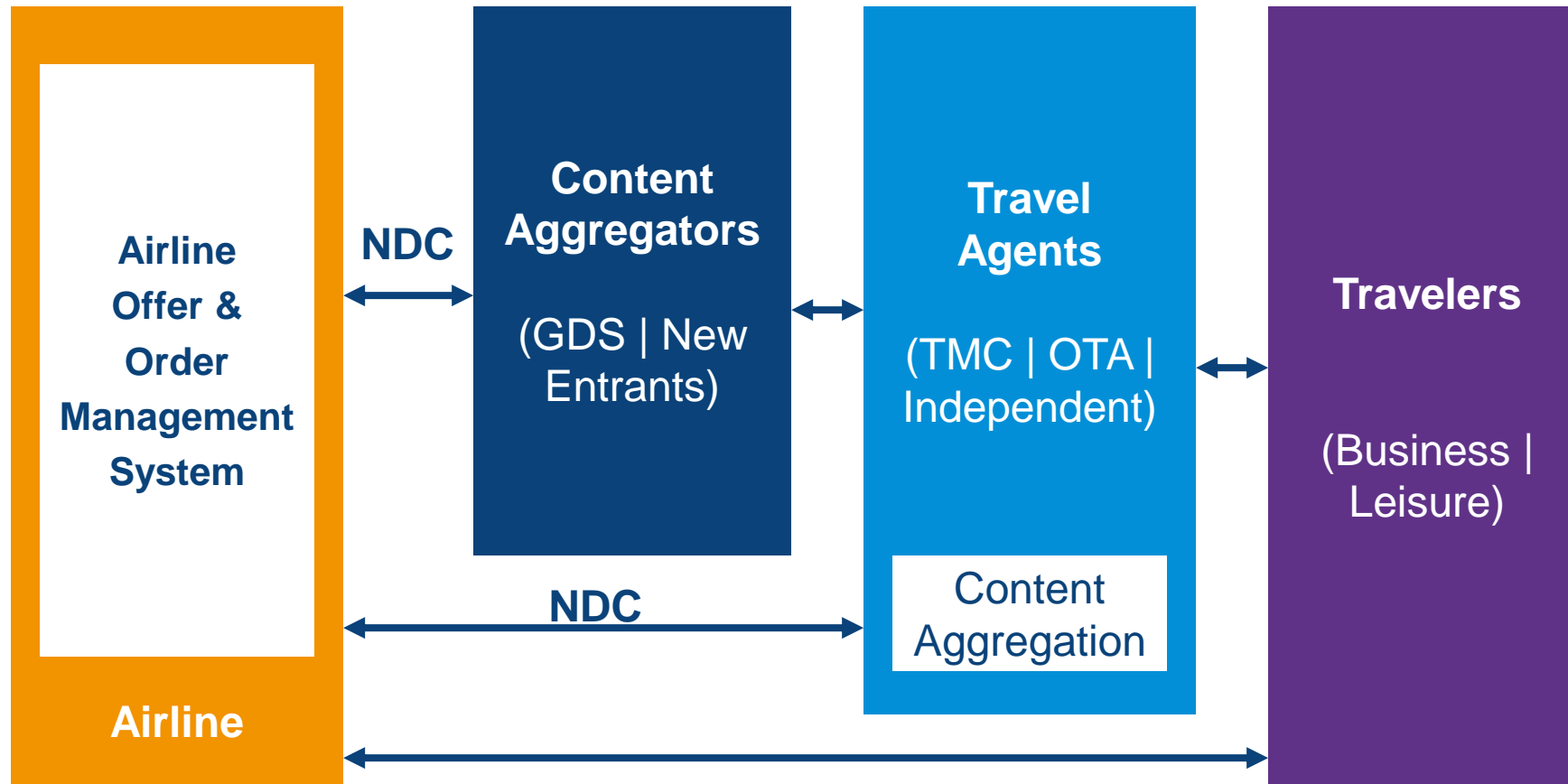
- Full-service and low-cost airlines
- Content aggregators and travel agents
- Corporate Buyers and travelers



How Flight Distribution Worked















Airline Retailing Works



Today's Shop Window

Compare airlines mainly on price and schedule

	9:40pm - 11:10am +1 Air Canada	7h 30m YYZ - FRA	Nonstop	 	4 left at \$925.90 roundtrip	Select
Flight details and baggage fees  Very Good Flight (8.4 out of 10)						
	5:05pm - 6:30am +1 Lufthansa <small>Lufthansa 6789 operated by Air Canada</small>	7h 25m YYZ - FRA	Nonstop	 	4 left at \$934.30 roundtrip	Select
Flight details and baggage fees  Very Good Flight (7.9 out of 10)						
	9:40pm - 11:10am +1 Lufthansa <small>Lufthansa 6779 operated by Air Canada</small>	7h 30m YYZ - FRA	Nonstop	 	4 left at \$934.30 roundtrip	Select
Flight details and baggage fees  Very Good Flight (8.4 out of 10)						

Source: Expedia 27th November 2017



Tomorrow's Shop Window

Enabled by NDC

Full airline products seen by consumer via travel agents

Information here
is purely for
illustration purposes

Price
and
Schedule

From **YYZ** To **FRA** Depart **19 Feb** my Update

Toronto, Canada (YYZ) to Frankfurt (FRA)

Airline	Flight Details	Class	Price
Lufthansa	11:55p YYZ (via LHR) 10 hours 10 mins + 1 day	Economy Included	\$ 716
British Airways	05:40p YYZ (via DUB) 10:10a FRA 10 hours 30 mins + 1 day 03:05p FRA (via LHR) 08:05p YYZ 11 hours 00 mins	Economy Included Included Included Included	\$ 899
Air France/KLM	06:35p YYZ (via CDG) 11:00a FRA 10 hours 40 mins + 1 day	Economy Included Included Included	\$ 908
American Airlines	12:10p YYZ (via CLT) 07:10a FRA 13 hours 05 mins + 1 day	Economy Included Included	\$ 911
Non-NDC Airline	09:20p YYZ (via ATH) 05:40a FRA 13 hours 20 mins + 1 day 05:40a FRA (via ATH) 04:20p YYZ 15 hours 05 mins	Economy	\$ 910

Meal
Refreshments in Economy Class – In Economy Class on all routes you can expect an extensive choice of hot and cold beverages — plus a little snack or a hot meal, depending on the route.

First Bag
First bag included – 1st Checked Bag – Size and Weight Per Bag Allowed: 62 in/158 cm (checked) 50 lbs/23 kgs (checked)







Tomorrow's Shop Window

Enabled by NDC

Comparison shopping capability

Information here
is purely for
illustration purposes

OUTBOUND		RETURN	
	BRITISH AIRWAYS	Lufthansa	Non-NDC Airline
Price	\$899 Book Flight	\$716 Book Flight	\$910 Book Flight
Departure	05:40p	11:55p	09:20p
Arrival	10:10a	04:05p	05:40a
Flight	BA6158, Airbus A330	LH6559, Boeing 787	XB123, Boeing 767
Duration	10h30m	10h10m	13h20m
In Flight Services			
Meal	 <p>Hot Meal/Beverage - You can enjoy a three course meal on your flight. Our bar service offers you a range of drinks to enjoy. And if you are hungry between meals, we also offer you a mid-flight snack.</p>	 <p>Refreshments in Economy Class - In Economy Class on all routes you can expect an extensive choice of hot and cold beverages — plus a little snack or a hot meal, depending on the route.</p>	This airline does not provide detailed information about its offers via this channel.
Entertainment	 <p>In Flight Entertainment - A whole world of entertainment awaits you with hundreds of films, television, music, audio books and games. On a personal flat screen and headphones. On-demand service that lets you choose what you want when you want it on most flights</p>	 <p>'Inflight Entertainment Program - Let yourself be entertained via your personal in-seat screen with Entertainment on Demand the way you like best: select your favourite from the extensive entertainment program which changes monthly, simply by using the user-friendly touch-screen navigation.'</p>	This airline does not provide detailed information about its offers via this channel.

NDC live examples



Rich content

Thomas Cook Chatbot


Messenger

Pre-order meals

These exclusive meals are hand-prepared by celebrity TV chef James Martin and can be pre-booked by everyone.

These meals will not be available on board. For our short-haul passengers, standard snacks and drinks will also be sold on board and can be purchased during the flight with credit card or cash.

Thomas Cook




Standard Meal

Standard Meal

Get it for 7.5 GBP

More information



Vegan Meal

Vegan meal

Get it for 7.5 GBP

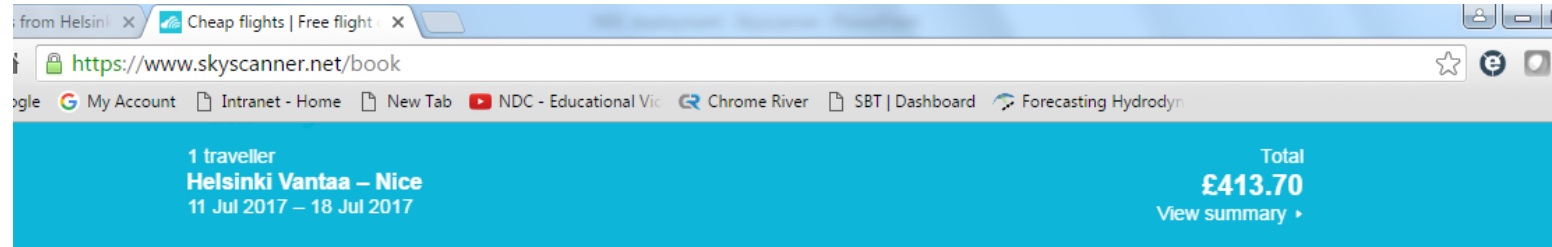
More information

Access to Airline's Inventory



- With NDC for the first time, agencies can see actual products that they can buy through rich media content
- And they can sell their new fare family products

Seamless shopping experience



The screenshot shows a web browser window with the URL <https://www.skyscanner.net/book>. The browser's address bar and tabs are visible. The main content area has a blue header with the following information: "1 traveller", "Helsinki Vantaa – Nice", "11 Jul 2017 – 18 Jul 2017", and a "Total" of "£413.70" with a "View summary" link.



Your fare



Passenger details



Billing address



Payment details

Booking with Finnair

- ✓ It's easy and secure
- ✓ Finnair will email you when your booking is confirmed and handle your customer service needs



Check your itinerary

✈ Outbound HEL – NCE

Tue, 11 Jul 2017



- 08:10 – HEL Helsinki Vantaa
- 10:30 – NCE Nice

✈ Return NCE – HEL

Tue, 18 Jul 2017



- 11:25 – NCE Nice
- 15:40 – HEL Helsinki Vantaa



Seamless shopping experience (cont'd)

The screenshot shows the British Airways website interface for booking a flight from London to New York. The top navigation bar includes the British Airways logo and a 'Buy travel' button. Below this is a progress bar with six steps: 1 Dates, 2 Flights, 3 Price, 4 Passengers, 5 Payment, and 6 Confirmation. The current step is '4 Passengers'. The flight details are: London to New York, Cabin class: World Traveller, Aircraft type: 744, Departure: 09:40 Wed 19 Oct 2016, Duration: 7 hrs 30 mins. A passenger named Mr Jonathan Hear is listed with 'No seat' assigned. Below this is a legend for seat types: Standard seat (blue), Exit seat (green), Unavailable (grey), Your seats (dark blue), and Selected passenger (red). The main area displays a detailed seat map for a 747 aircraft, showing rows 39 to 45 and columns A through K. Seats are color-coded according to the legend, with some seats highlighted in red to indicate they are selected for the passenger.

British Airways.com

The screenshot shows the British Airways website interface on the Skyscanner platform for booking a flight from London Heathrow to New York John F. Kennedy. The top navigation bar includes the British Airways logo. The flight details are: London Heathrow - New York John F. Kennedy, 01 Sept 2016 - 04 Sept 2016, 2 x 0, £982.00. Below this is a progress bar with five steps: Flight details, Passenger details, Optional extras, Payment details, and Review and confirm. The current step is 'Flight details'. The main area displays a 'Select your seats' section with a seat map showing rows 5 to 16 and columns A through F. Seats are color-coded according to the legend, with some seats highlighted in red to indicate they are selected for the passenger.

British Airways on Skyscanner



Augmenting key product information at the point of sale



Flight Brands

Economy Classic

Economy Classic Plus

Economy Flex

Economy Flex Plus

Business Classic Plus

Swiss

First
 Enjoy the highest possible level of comfort - discrete personal care, gracious hospitality, gourmet menus and fine wines. Relax in our armchairs that turn into generous flat beds in moments and offer a lot of privacy.

Your FIRST fare includes:

- 3 pieces checked baggage up to 32 kg.
- 2 piece of hand baggage up to 8 kg.
- Premium food and beverages.
- Miles.
- Rebooking without a fee.
- Refund without a fee.

Swiss	Swiss 777 300er aircraft	Standard seat reservation	Rebooking	Refund	Checked baggage	Carry on bags	Miles and more miles	Wifi	Lounge access	Complimentary food and beverages	Priority services	Upgradeable fare
Economy Classic	✓	\$	\$	✗	✓	✓	✓	\$	✗	✓	✗	✓
Economy Classic Plus	✓	\$	\$	\$	✓	✓	✓	\$	✗	✓	✗	✓
Economy Flex	✓	\$	✓	\$	✓	✓	✓	\$	✗	✓	✗	✓
Economy Flex Plus	✓	\$	✓	✓	✓	✓	✓	\$	✗	✓	✗	✓
Business Classic Plus	✓	✓	\$	\$	✓	✓	✓	\$	✓	✓	✓	✗
Business Flex Plus	✓	✓	✓	✓	✓	✓	✓	\$	✓	✓	✓	✗
First	✓	✓	✓	✓	✓	✓	✓	\$	✓	✓	✓	✗

NDC Program Update

What happened in 2017?

Transport, Airlines

Air France-KLM Joins Rivals in Adding Distribution Surcharge

Patrick Whyte, Skift - Nov 03, 2017 9:00 am

American Adds Incentives to NDC Adoption



Dear Valued Partner

This morning British Airways (BA) and Iberia (IB) are announcing a change in approach to distribution and I wanted to let you know the details.



\$ Lufthansa CEO Says Other Airlines Will Follow

Lufthansa Group's global distribution system bill has grown substantially since the launch of its contentious distribution strategy in 2015. Last year, GDS expenses rose to €449 million, according to the company's annual report this week. No bother to Lufthansa, though: Its GDS surcharge effectively shifts those costs to users.

More NDC capable airlines

- 50 airlines representing 47% of IATA member passengers boarded

Airline announcements of distribution strategies

- AA, AF, BA, IB, KL, LH, LX, OS, SN
- Clear separation between surcharge/incentive approach and NDC implementation

What is IATA doing for NDC?



Engagement & Adoption

- Airlines
- IT providers
- Travel trade
- Corporates

Standard settings & evolution

- Standard versions
- Implementation support (start up , developers..)
- Hackathons



NDC Live Implementations

-

55

NDC Certified Deployments

Level 3 Airlines as of 12/04/2018

- ▶ Aegean Airlines
- ▶ Aer Lingus
- ▶ PJSC Aeroflot
- ▶ Air Austral
- ▶ Air Canada
- ▶ Air China
- ▶ Air France
- ▶ American Airlines
- ▶ APG Airlines
- ▶ Austrian Airlines
- ▶ British Airways
- ▶ Brussels Airlines
- ▶ Cathay Pacific Airways
- ▶ China Eastern
- ▶ China Southern
- ▶ Colorful Guizhou
- ▶ Condor
- ▶ Emirates
- ▶ Etihad
- ▶ Ethiopian Airlines
- ▶ EVA Air
- ▶ Finnair
- ▶ Flybe
- ▶ flydubai
- ▶ FlyEgypt
- ▶ GOL
- ▶ Jiangxi Air
- ▶ Hainan Airlines
- ▶ Iberia
- ▶ Iberia Express
- ▶ InselAir
- ▶ KLM Royal Dutch Airlines
- ▶ Korean Air
- ▶ Lufthansa
- ▶ Norwegian Air Shuttle
- ▶ Olympic Air
- ▶ Qatar Airways
- ▶ Rotana Jet
- ▶ Saudi Arabian Airlines
- ▶ Shandong Airlines
- ▶ Shenzhen Airlines
- ▶ Sichuan Airlines
- ▶ S7 Siberia Airlines
- ▶ SunExpress Germany
- ▶ SunExpress Turkey
- ▶ SWISS
- ▶ TAP
- ▶ Thomas Cook Airlines Manchester
- ▶ Thomas Cook Airlines Belgium
- ▶ Turkish Airlines
- ▶ United Airlines
- ▶ Vueling
- ▶ WestJet
- ▶ Xiamen Airlines

System Providers certified & capable to date

-

54

- 40 IT Providers - Capable
- 14 Aggregators - Certified
- Includes 4 Start ups

- ▼ Aaron Group
- ▼ Airlines Technology
- ▼ AirGateway
- ▼ Amadeus
- ▼ APG
- ▼ ATPCO
- ▼ Atriis Technologies
- ▼ Beijing Asia Technology Co
- ▼ Birdres Technologies
- ▼ Conztanz
- ▼ Caravelo
- ▼ Datalex
- ▼ DXC Technology
- ▼ Farelogix
- ▼ Forever Flying
- ▼ Hitit
- ▼ IBS
- ▼ Indra
- ▼ Information Systems Associates
- ▼ InteRES
- ▼ ISO Software Systeme
- ▼ ITA Software by Google
- ▼ Iween Software Solutions
- ▼ JR Technologies
- ▼ KAYAK Software Co
- ▼ Maureva
- ▼ Marco Polo Technology
- ▼ Navitaire
- ▼ On Travel Solutions
- ▼ Openjaw
- ▼ Pribas
- ▼ PROS
- ▼ Reserve
- ▼ Sabre
- ▼ SAP Hybris
- ▼ Shanghai Aqueduct Information Technology
- ▼ Shree Partners
- ▼ "Sirena-Travel" JSC
- ▼ SITA
- ▼ Skyscanner
- ▼ TOPAS
- ▼ TPConnects
- ▼ Travelfusion
- ▼ Travel Planet
- ▼ Travelport
- ▼ Travelsky
- ▼ Verteil Technologies
- ▼ WTMC
- ▼ XML Travelgate

GDSs to become Level 3 NDC aggregators 2018

aMADEUS

- Plan 2018

Sabre

- Plan 2018

Travelport 

- Certified Level 3 in December 2017



Sellers certified to date

-

14

NDC Certified
Implementations

- Includes 5 TMCs

- ▶ AL Maghseel International LLC
- ▶ China Air Service Ltd.
- ▶ Click Travel
- ▶ Club Travel
- ▶ Ctrip.com International Ltd.
- ▶ Flyazmeel.com (Azmeel International Agency Tours & Travel)
- ▶ Hogg Robinson Group
- ▶ Logitravel Group
- ▶ Superior Tracks Travel & Tourism – Zeeyarah.com
- ▶ TravelCC
- ▶ Travel Planet
- ▶ Tripadvisor, LLC
- ▶ Viaflight.com (Talent Travel & Tourism)
- ▶ WTMC

NDC Roadmap set with IATA Board

2012-2014

- Foundation standard
- Live Demos
- US DOT approval
- **First Pilots**

2015-2017

- Robust standard aligned with the Industry Data Model
- Strong Industry awareness
- A community of 50 NDC capable vendors
- **45 NDC Certified airlines**

2018-2020

- Support implementation
- Engage all value chain members
- Shift from capability to volumes
- **Drive Critical Mass**



NDC Leaderboard



AIM:

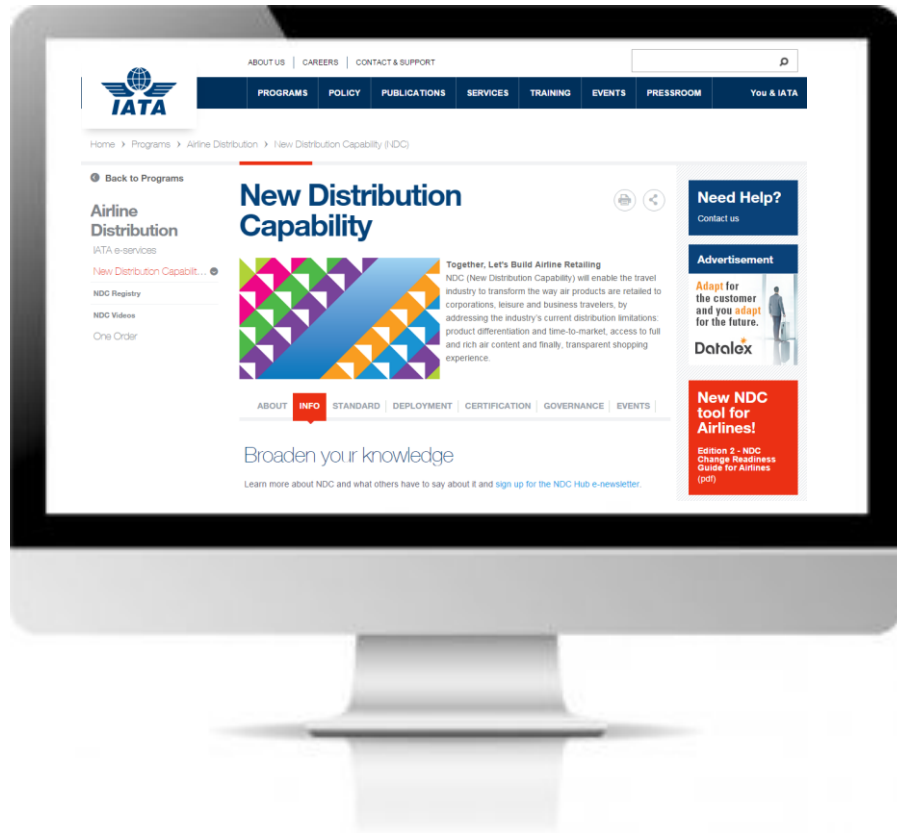
- grow NDC volumes rapidly

Benefits:

- rapid growth of the number of travel agents, corporate buyers and consumers using NDC
- speed up deployments
- help IT players to enhance their solutions and trigger innovation from new entrants
- increase competition and speed to market for NDC followers



NDC Tools & Comms Channels



NDC Certification Registry

- Up-to-date list of all companies that are considered NDC Certified/Capable

Dedicated NDC Microsites

- For Airlines, Business Travel and Developers

Change Readiness Guide for Airlines

- A support tool for airlines planning their NDC enablement from defining the vision and strategy to initiating the program

Info tab on iata.org

- To access white papers, dedicated microsites, case studies and guidelines around the NDC standard



**For more information
subscribe to the NDC Hub
www.iata.org/publications**

