

InvestorDay

06 March 2018

Sabre[®]



The Sabre logo is displayed in white, bold, italicized font on a red rectangular background in the top-left corner of the slide.

Sabre

NDC and Reimagining Airline Retailing

Kathy Morgan

Vice President, Sabre Corp

06 March 2018

InvestorDay

Marketplace dynamics driving need for new retailing and distribution capabilities



Airlines need to **differentiate** to drive revenue in a competitive marketplace



Consumer expectations are **changing**



Technology evolution **enables** digital retailing transformation

WHAT NDC IS (AND WHAT IT ISN'T)

NDC (New Distribution Capability) is a travel industry-supported program launched by IATA for the development and market adoption of a new, XML-based data transmission standard.

NDC is **NOT** a commercial model or new retailing solutions.



What NDC enables

Product differentiation and time-to-market

Access to rich air content

A consistent shopping experience

Level 1

Post Booking
Ancillary Offers

Level 2

Air and Ancillary
Offer Management

Level 3

Offer and Order
Management

NDC Capable: IT providers (Airline Solutions – Level 3)

NDC Certified: Seller, airline and aggregator (Travel Network – Level 1)

Why is it so complex?



01

**Maturity of the
NDC Standards**

02

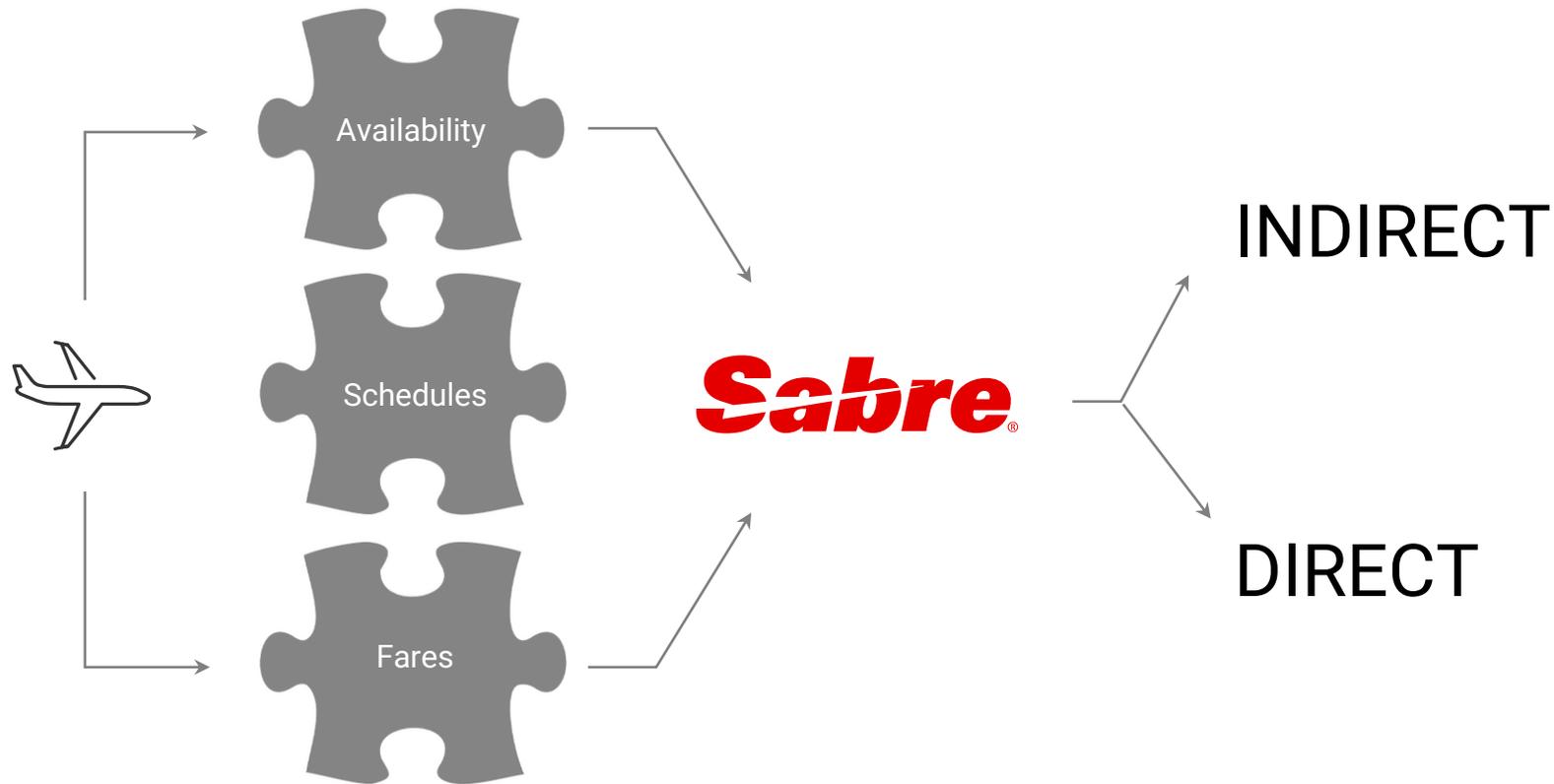
**Functionality of
Airline APIs**

03

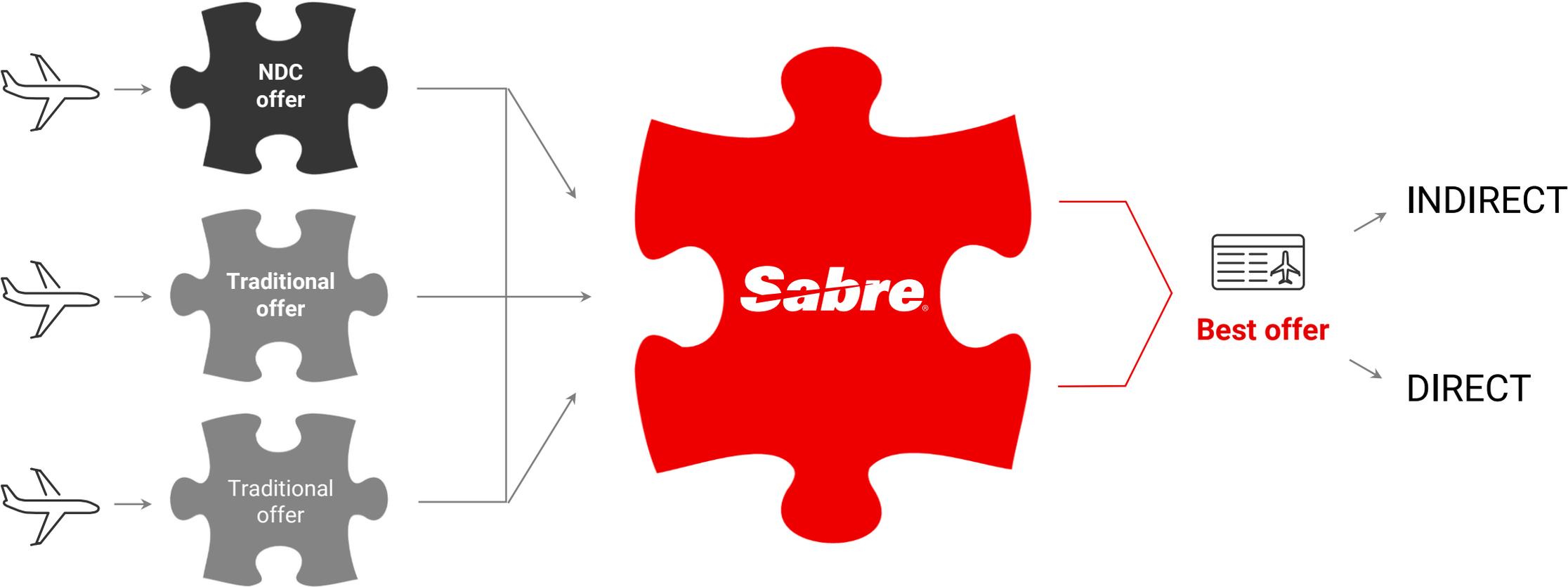
**Challenge of a
Hybrid World**



Traditional offer distribution requires advanced algorithms to find the best fare



NDC offers require added intelligence and normalization

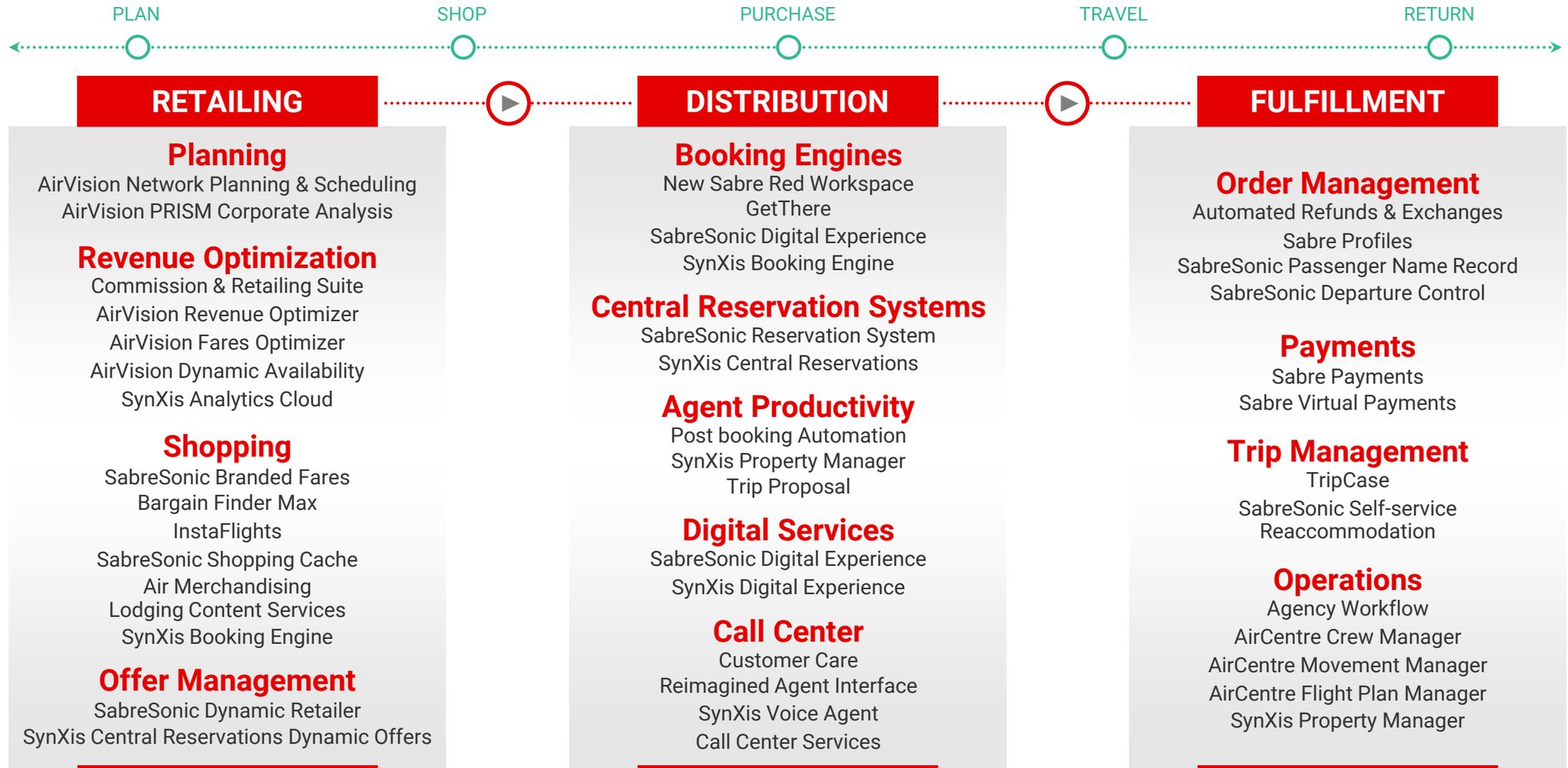


We are the leader in aggregation, indexing and analytics

Sabre can enable an end-to-end NDC solution



SABRE IS POSITIONED TO WIN



Profiles | Data & Analytic Solutions | API / Service Enablement Solutions

Artificial Intelligence / Machine Learning Solutions



For NDC to be successful, the GDSs need to be a part of it, simply because they have a huge reach to travel agents.

It started toward the end of last year, when Sean Menke from Sabre announced publicly:

2018 IS THE YEAR SABRE IS GOING TO TAKE THE REINS.

Yanik Holyes, IATA NDC Program Director