



# Views on Future Distribution

**MATKA**

21 January 2016



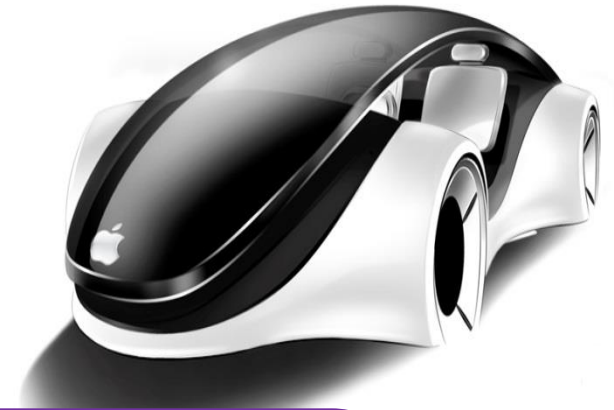
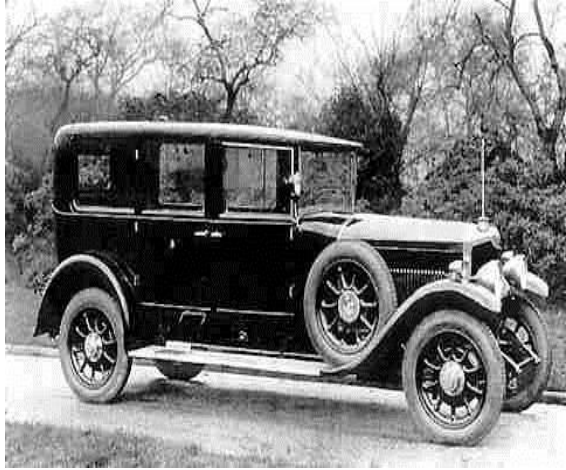
# Overview

▼ **The pace of change is accelerating**

▼ **What's happening around us**

▼ **NDC**





### CARS in last 100 years:

- Black
- Steering wheel
- Petrol engine
- Owned
- Mass-produced

### CARS in next 10 years?

- White
- No driver
- No petrol
- Shared
- 3D-printed





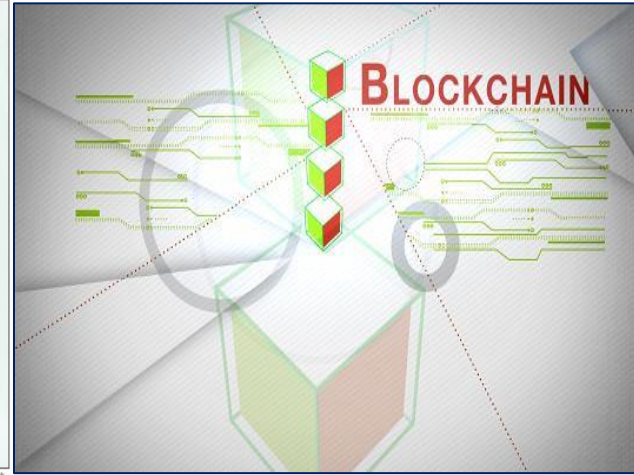
Webbath77

www.delcampe.net



Daidona

www.delcampe.net



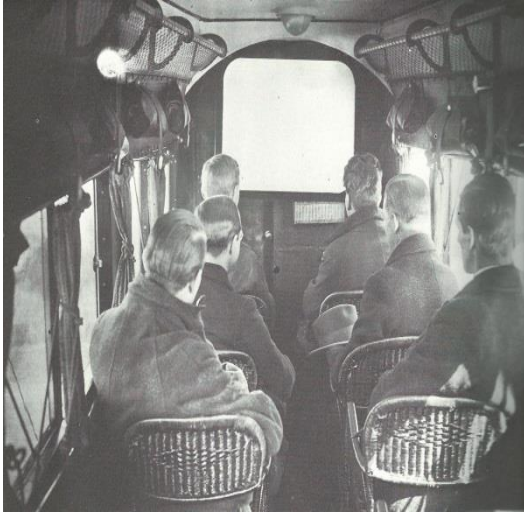
### PAYMENT in last 100 years:

- Green
- Paper
- Trust in government

### PAYMENT in next 10 years?

- Green
- Digital
- Trust in peers





### INFLIGHT in last 100 years:

- Movies
- Seats
- Windows
- Offline

### INFLIGHT in next 10 years?

- No movies
- No seats
- No windows
- Connected





### AIRLINES in last 100 years:

- Airplanes
- Pilots
- Crew

### AIRLINES in next 10 years?

- Shared, 3D printed aircraft
- Drones in air space
- Commercial Space travel



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# Amadeus acquires Navitaire PSS

JULY 01, 2015

Amadeus to Acquire Navitaire from  
Accenture for US\$830 Million; Amadeus and  
Accenture Form Alliance to Create Passenger-  
Focused Digital Services For Airlines



# Blackstone to Invest \$170 Million in IBS Software



## Blackstone back in travel tech with \$170 million IBS Software deal

[Comment](#) [Print](#)

Dec 17, 2015

India-based travel tech firm IBS Software has confirmed that private equity giant Blackstone has invested \$170 million for an undisclosed minority stake.

IBS said in its [statement](#) that Blackstone has effectively bought out [General Atlantic](#), which invested \$60 million in IBS back in 2007.

With a range of products for airline passenger, operational and cargo management, and other travel verticals including cruise, hospitality, tour operators and loyalty (with some oil and gas logistics thrown in for good measure) IBS brings Blackstone back into the travel tech arena.

The VC firm is best known in the sector for spending \$4.3 billion on [Travelport](#) in 2006. When [Travelport](#) floated in 2014, it held on to a 7% stake.

The scale of the success (or otherwise) of the investment is not specified, although at the time of [Travelport's](#) IPO, [Bloomberg](#) quoted an anonymous insider who said that Blackstone "stands to make about a 15 percent annualized internal rate of return on the investment."

The statement from IBS (and [General Atlantic](#), nothing as yet from [Blackstone](#) itself) is full of the usual corporate soundbites, but a few stand out. Amit Dixit, Blackstone's managing director for Indian private equity, notes that IBS is a "rare" combination of being a Software as a Service (SaaS) company, with Intellectual Property, operating across the airline, travel and hospitality verticals..."

# \$900m invested by Certares

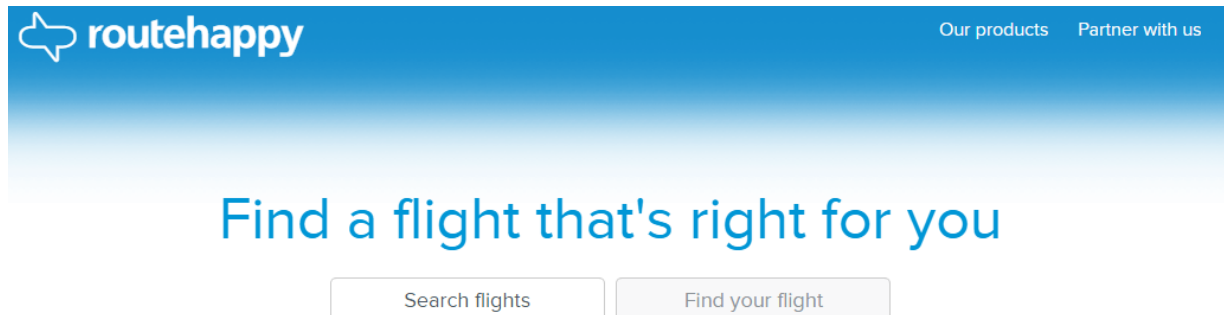
- ▼ ... mostly go to new technology investments in American ExpressGBT...

**INTERVIEW: Certares Founder, American Express GBT Chairman Greg O'Hara**  
**The Beat ~ a travel business newsletter - 10/12/15**



# RouteHappy gets \$3m funding

- ▼ Central hub for content management



The image shows the top section of the RouteHappy website. It features a blue header with the RouteHappy logo on the left and navigation links 'Our products' and 'Partner with us' on the right. Below the header is a large white area with the text 'Find a flight that's right for you' in blue. Underneath this text are two search buttons: 'Search flights' and 'Find your flight'.

**NEW** Get a sneak peak of Routehappy Hub UPAs in action. Check out Qantas [Business](#).

<input type="text" value="From city"/>	to	<input type="text" value="To city"/>	Depart	Oct 16	Economy	<input type="button" value="Search"/>
			Return	Optional	1 traveler	

[Search more cities](#)

Routehappy is the product differentiation platform for air travel



A horizontal bar containing six icons representing different features: a smiley face with '8.4', an airplane icon with 'A380-800', a seat icon with 'Roomier (32"+W)', a play button icon with 'On demand', a plug icon with 'Plugs +UK/USB', and a Wi-Fi icon with 'Best'.



# The developer community is engaging



## In-flight entertainment: hacking NDC, BYOD and shopping

[Comment](#) [Print](#)

Oct 19, 2015

Cool spaces induce cool ideas and for a few hours last weekend the ground floor of Betahaus Hamburg was transformed into:

- an airport security line and duty-free store
- an economy seat beside a crying baby



# And what about the others?



**facebook.**



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▼ **NDC**



# What is NDC?

NDC 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 about giving travel agents the **same capability** as airline websites

The **NDC standard** will enhance the capability of communications between airlines and travel agents, and will be open to any third party, intermediary, IT provider or non-IATA member, to implement and use.



# Benefit to Travel Agents

- ▶ Access to full and rich content
- ▶ Comparison on schedule, price AND value
- ▶ Ability to tailor and personalize offers
- ▶ Significant reduction in ADMs

NDC DEMONSTRATOR

SEARCH PERSONAS REPORTS ADMIN Marsha Anderson Executive

Comparison Matrix Paris (CDG) — New York (JFK) 26 Nov Return to Quotes >

Airlines	Number of Stops	Seat	Entertainment	Priority Checkin	WiFi	Bag	Hotel Upgrade	Prepaid Boarding	Upgrade	Fast Track	Total
Chronos	Direct	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	€931.00
DEMETER AIR	1 stop	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	€885.00
Flyopelle	1 stop	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	€950.00

Included in Price  Unselected Optional Extras  Selected Optional Extras  Unavailable

**DEMETER AIR**

**Seat**



Comfort airline seat are accommodated for the duration of the journey

**Snack & Drink**



We welcome you on board with beverage of choice of one our two delicious hot meals.

**In Flight WiFi Usage**



WiFi included with this airline. You can enjoy high speed internet in the sky work, stay connected or just surf.





# NDC SO FAR

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## NEW DISTRIBUTION CAPABILITY



# NDC, now an industry standard

First industry  
standard

**NDC 15.2**

Released  
1 Sep 15



# Airlines are investing in NDC



# The top Airline Groups are engaged



Airline Business magazine (Flightglobal). Top Airline Group rankings 2014



# IATA NDC Surveys

**Canadian TRAVEL PRESS**  
CANADA'S MOST TRUSTED TRAVEL TRADE PUBLICATION SINCE 1968

## Hardware hogs!

### Canadians win big at Karisma gala

**LEAD PARAGRAPH**  
The majority of the 450 industry professionals on-site for the recent 8th Annual Global Inclusive Vacation Consultant (GIVC) Awards by Karisma Hotels & Resorts (Dec. 11) were American, but a significant number of Canadian agents and tour operators still came out on top.

Field at the 8th Annual Royale in Riviera Maya, Mexico, in conjunction with a four-day sales and marketing forum, the luxury hotel collection recognized its top-performing international travel consultants by distributing 300 awards in categories like Top Growth by region, Top 10 Producer, and Highest Category Sales, as well as honoring those who achieved Diamond Level sales status.

"Travel agents are essential to growing our business, and eight years ago, we committed to fully supporting the travel agent community with the debut of the GIVC program," Alex Portman, senior business development manager - national, Canada, told Canadian Travel Press. "In Canada, Karisma channels all of its business through GIVC agents, and the awards give us an opportunity to recognize their hard work."

Vietnam winner Kim Crosby of SunLovers Travel in Victoria, BC, who has taken home awards since its inception in 2008 - including the most prestigious Hall of Fame recognition in 2013 - received nods for Top 10 Wedding Producer - Azul Hotels, Diamond Level 5 and being the Top Selling Home-Based Agent in Canada.

"When I was introduced to Karisma Hotels & Resorts, I remember thinking this is a match made in heaven. Our philosophies were and are the same - a passion for providing an experience of service that goes above and beyond expectations," she told Canadian Travel Press.

*By KENNETH page 2*



**ictured at the 8th Annual Global Inclusive Vacation Consultant Awards (l-r) are Jeron Haele, VP of food & beverage operations at Karisma; multiple award winner Kim Crosby of SunLovers Travel in Victoria, BC; Walter Choquet, executive VP of sales & marketing, Karisma; and Rina de Jong, VP of sales & marketing, Karisma.**

**Agents should welcome NDC**

**ROSE MURRAY**  
The retail travel trade need not fear IATA's New Distribution Capability (NDC) currently being beta-tested by the first batch of member airlines. In fact, they should be wholeheartedly embracing the new XML Internet transaction standard since it puts them on an equal sales footing with carrier web sites.

And, if the Internet had been around in the 1960s, the airlines would not have developed the computer reservations systems that are still - 40 years or so later - being used as the primary booking tool by the indirect sales channel.

That was the clear message delivered by NDC program director Yanik Hoylek during a one-day media blitz at IATA headquarters in Geneva.

According to Hoylek "airlines were ahead of the curve when they developed their distribution networks.

*By BBO page 2*

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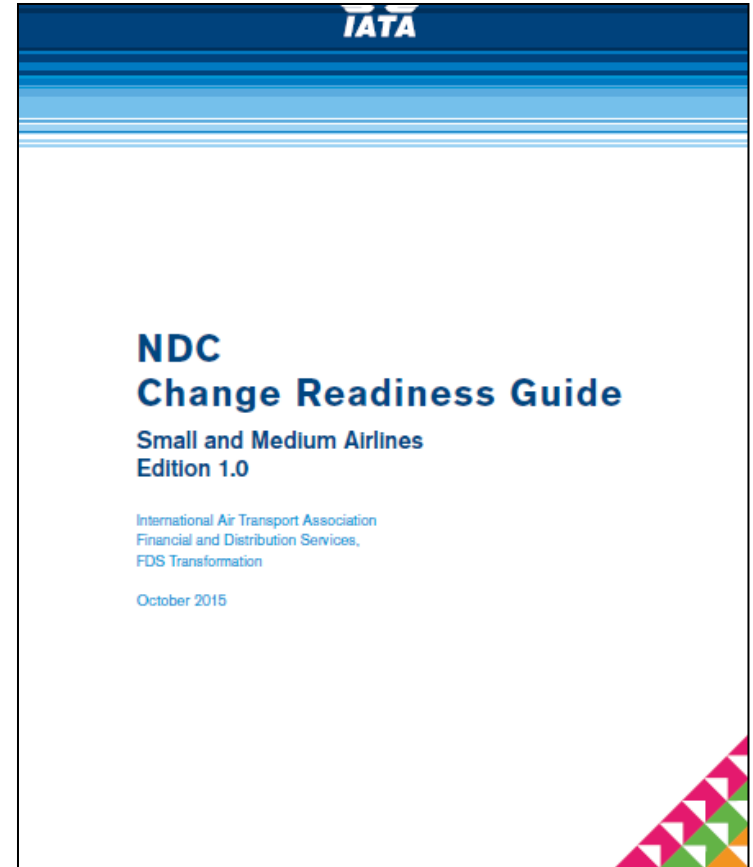
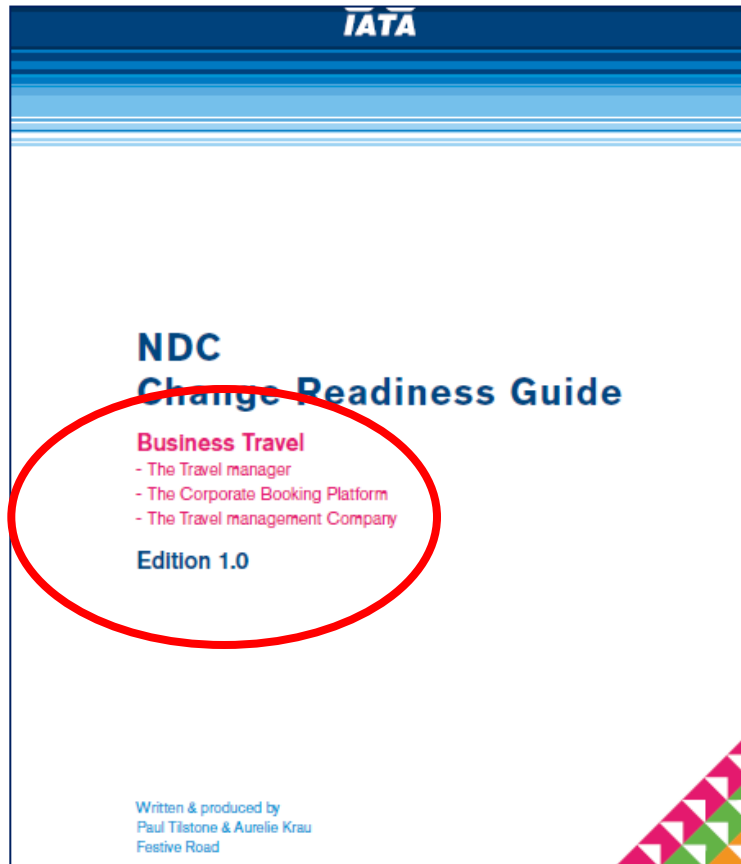
## NDC: How Consumers View the Future

Insights into Consumer Views on the Benefits of Airline Retailing

October 2015



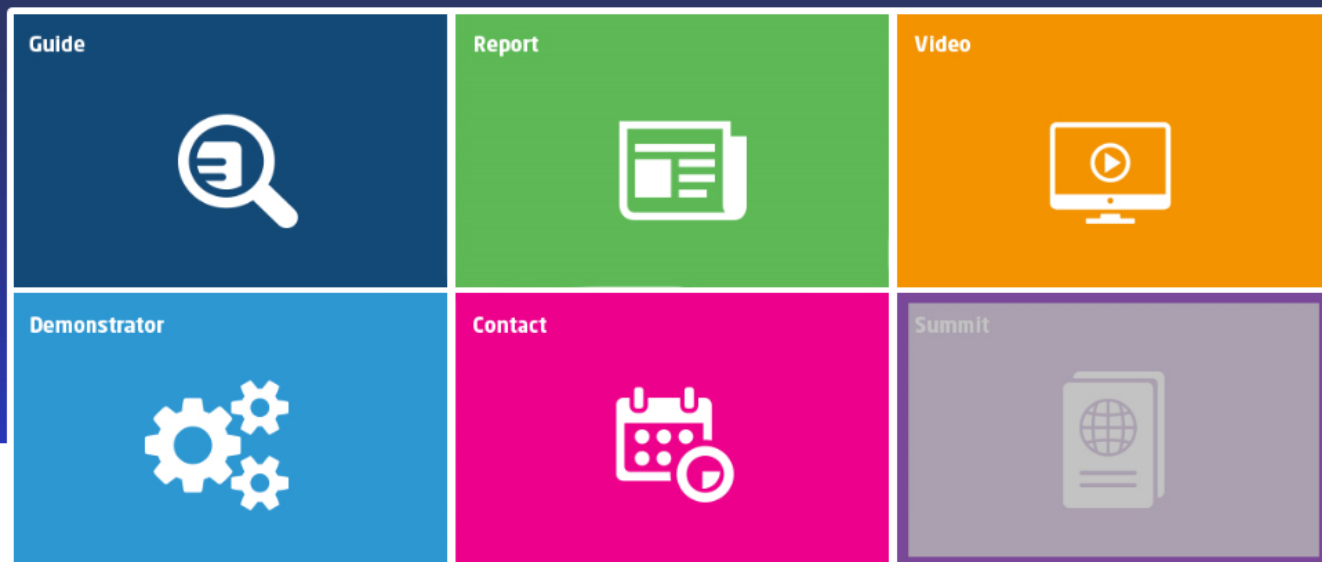
# IATA NDC Change Readiness Guides



# New: [NDCbiztravel.iata.org](http://NDCbiztravel.iata.org)



## NDC for Business Travel



This microsite emphasizes the importance of the business travel market, the indirect channels and its various stakeholders. It has been developed as a place where useful tools and reports are available for business travel professionals to get the most out of NDC.



[\*\*www.iata.org/NDC\*\*](http://www.iata.org/NDC)

