



# **B E Y O N D N D C**

NDC in Action | November 2022  
Kathy Morgan, VP Sabre, NDC & Airline Supply

# Our Time Today

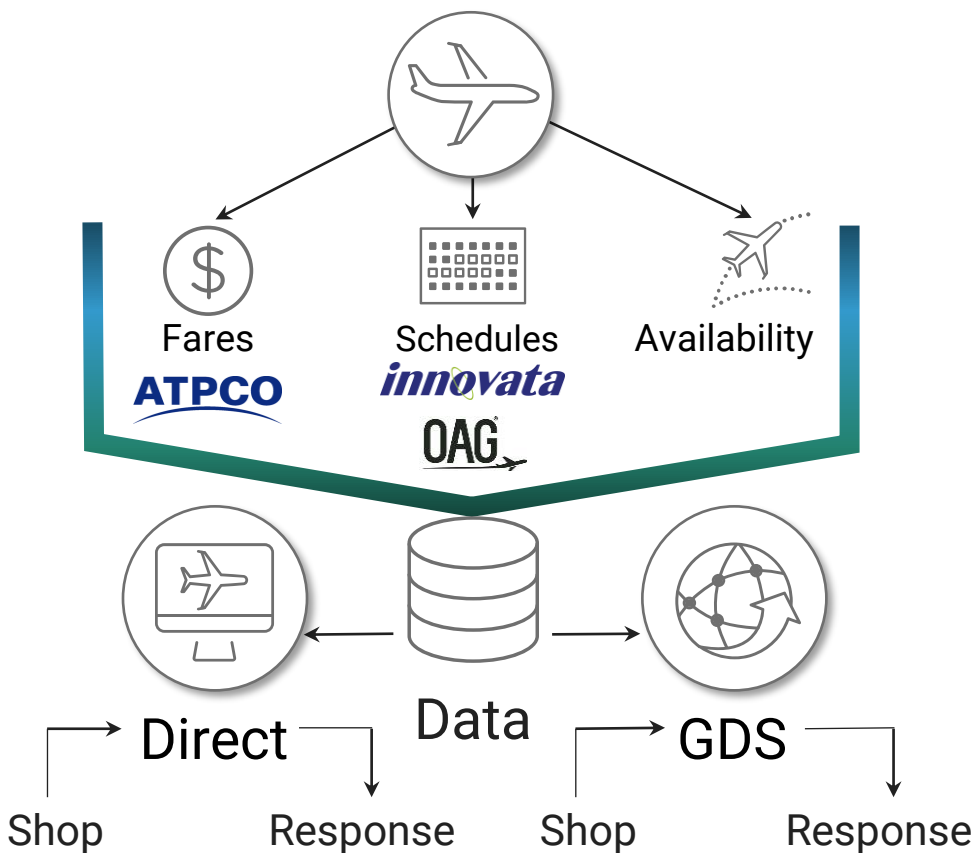


- NDC in 2022
- NDC and You
- Sabre roadmap
- Q&A

# NDC Supports Flexible Retailing

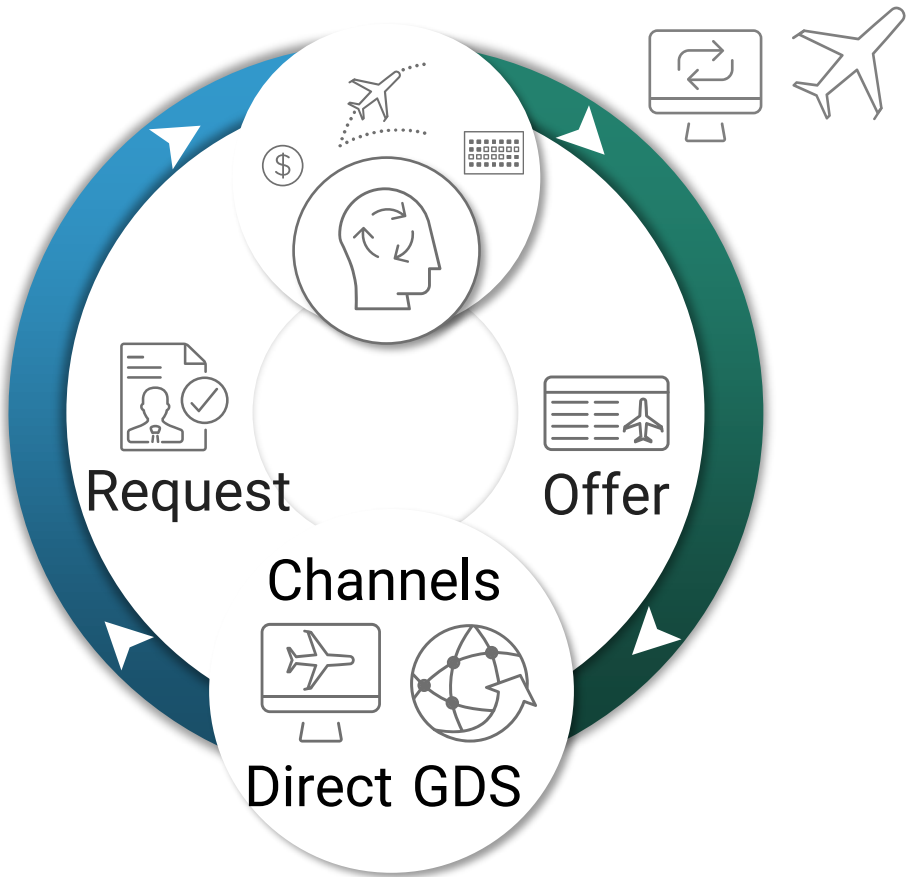
EXISTING TECHNOLOGY

**Aggregators create offers**



WITH NDC

**Airlines create offers**



# “Early Days” on Maturity Curve

**The promise of NDC...**

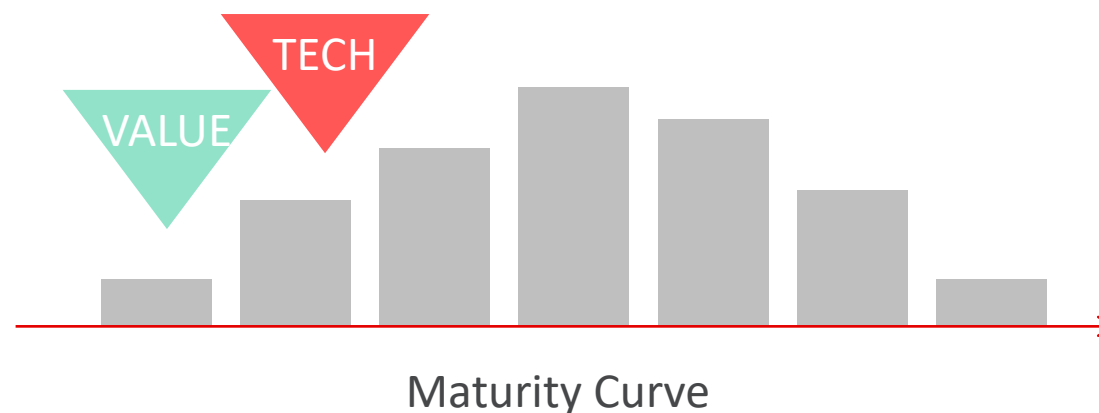
**VALUE CREATION**

Create new content

**...relies on technical evolution**

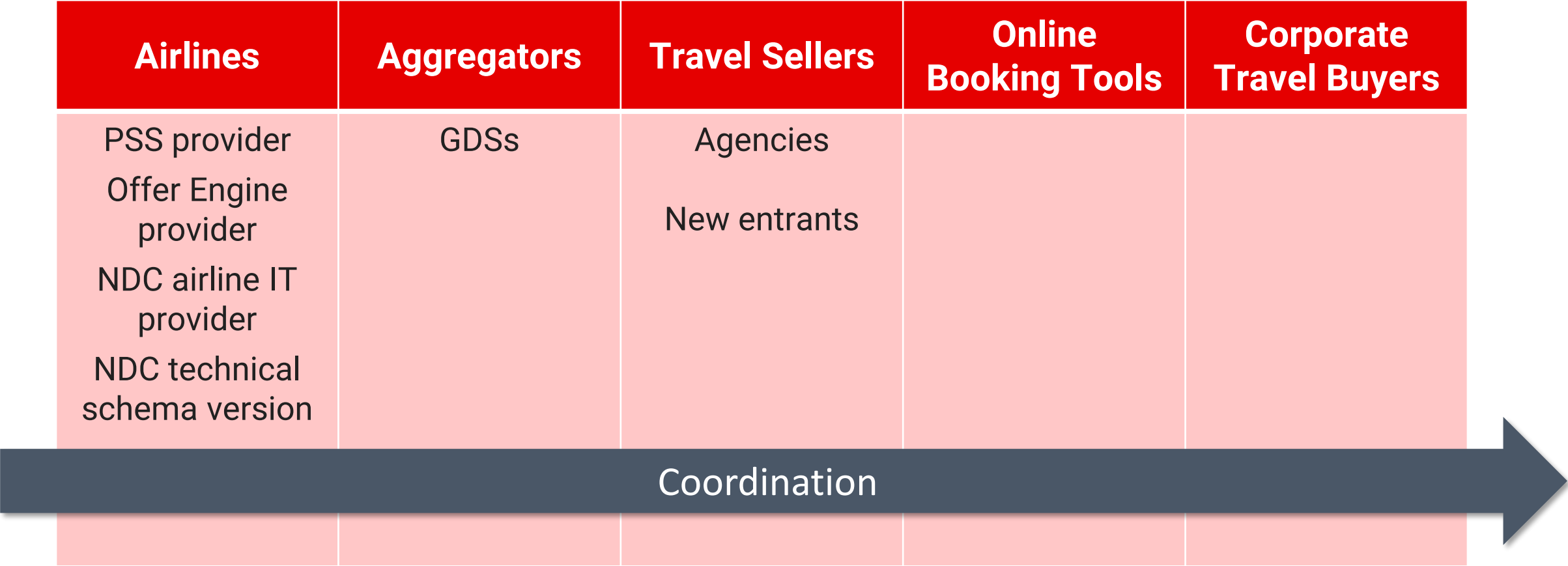
**TECH EVOLUTION**

Enable content to flow



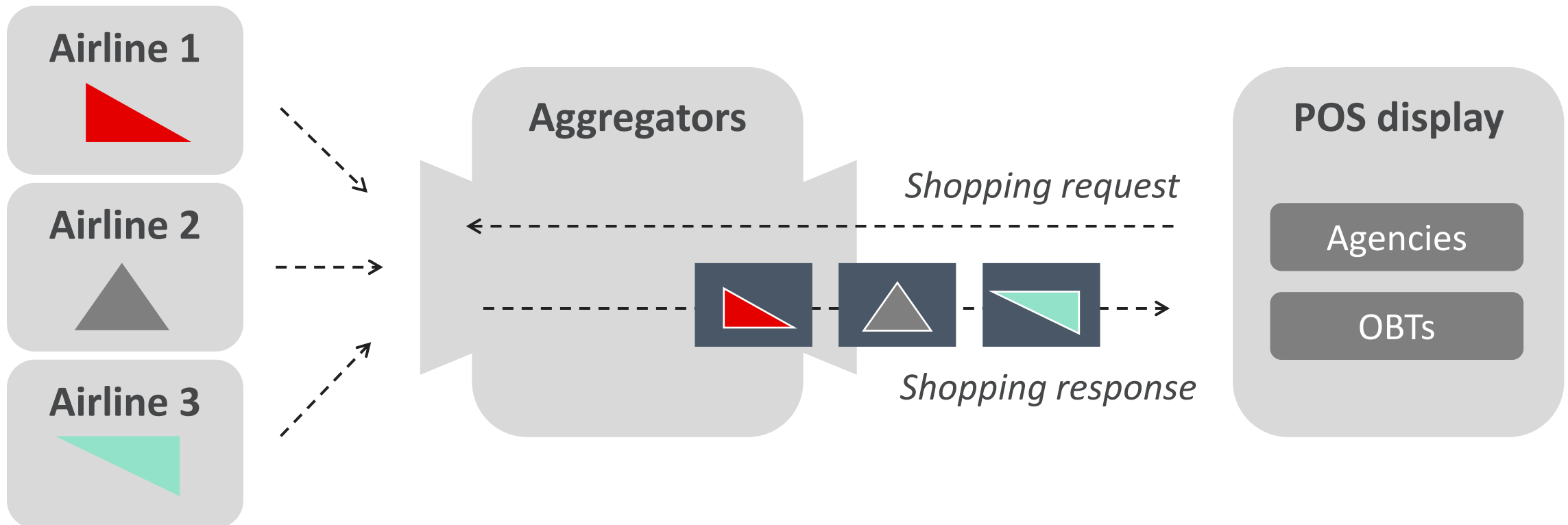
# Coordination is Key

Each link in the travel value chain has work to do to bring NDC to life



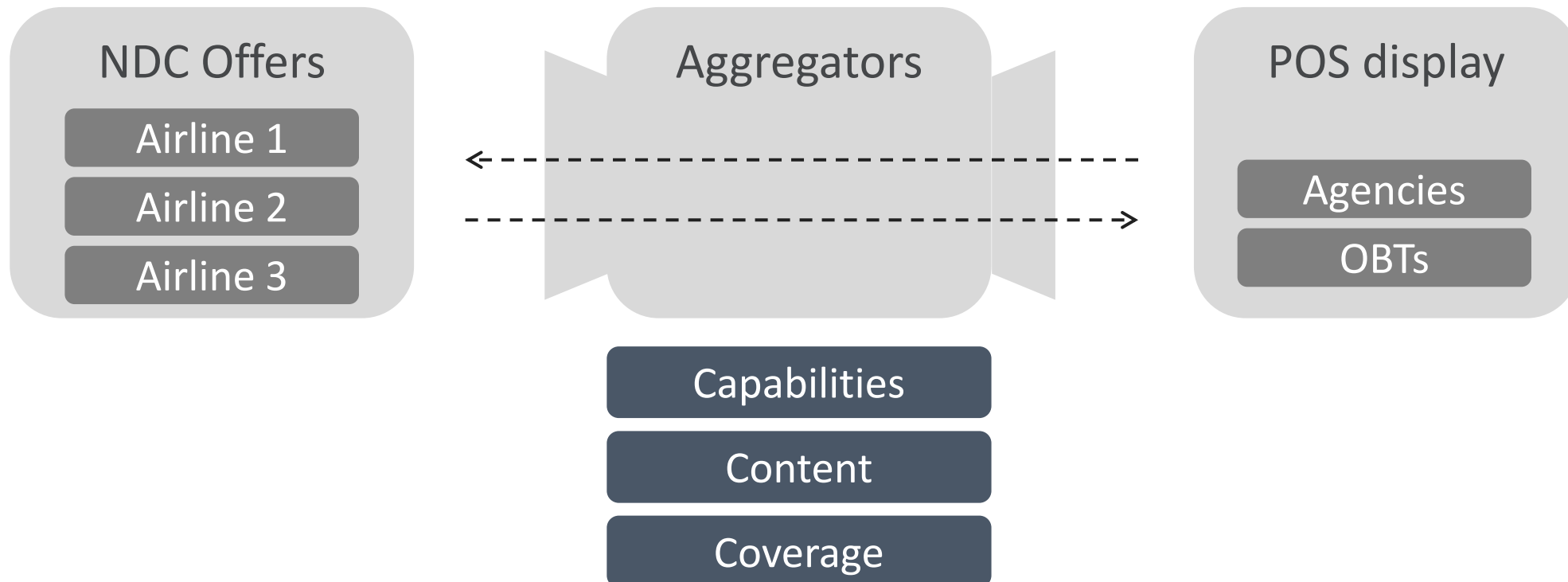
# Airlines Vary; Normalization Needed

- Airline approaches to NDC implementation vary
- As a result, Aggregators (e.g., GDSs) assume responsibility for normalization



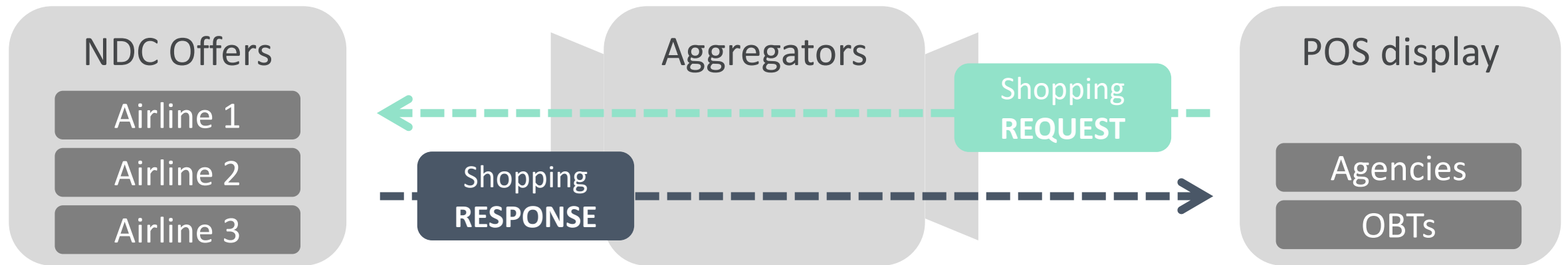
# End-to-end Support is Important

**Aggregators should continue to enable new capabilities, integrate new content, and expand coverage to new markets to drive NDC adoption**



# Need to Reduce Response Times

**To avoid shopping abandonment and lost sales, airlines should reduce shopping response times**

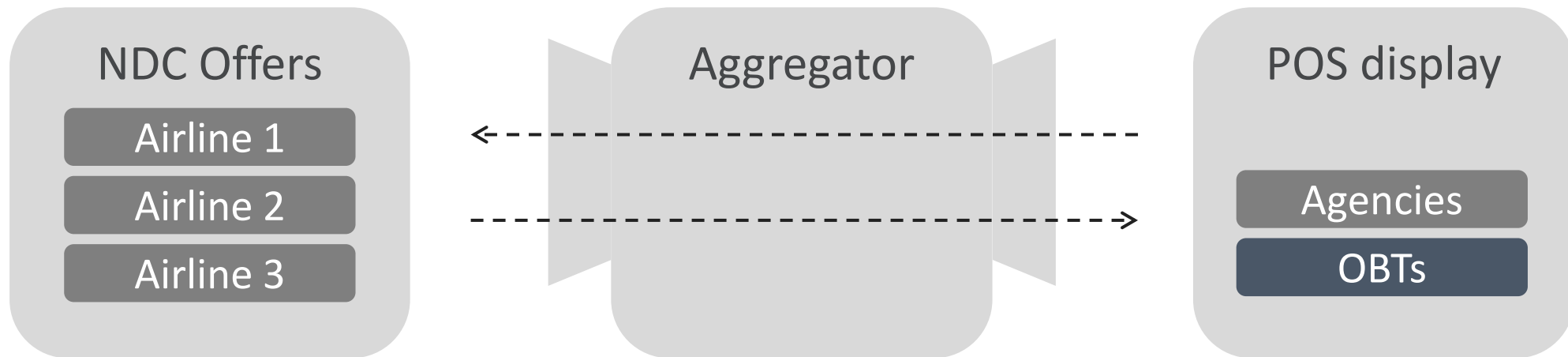


Many shopping responses are taking **8+ seconds**



# Growing Interest in OBTs’ NDC Plans

**Desire for more visibility from OBTs about their NDC plans  
and how they will optimize content display**



# NDC and You

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1

## Look in the mirror

Establish your organizational perspective on NDC: given your org's travel DNA, what value do you want to unlock? How ready is your org to activate?

2

## Speak up

Talk to partners about their NDC plans, (e.g., commercial implications, technology roadmaps, content, capabilities, market coverage, SLAs, etc.)

3

## Think about "what if?"

Understand your organization's travel needs, and share those needs with partners to brainstorm about creating new relevant offers

4

## Get off the sidelines

Join NDC pilots to get your feet wet testing

5

## Ride the learning curve

Help your teams understand the what, why and how of NDC

# Sabre NDC distribution pipeline includes 30+ airlines

## EXPLORATION Initial conversations



## DISCOVERY Due diligence



### Offer and Order API Capabilities (Sabre Red 360 support typically follows 1-3 months later)

	Airline	Target launch	Offer and Order API Capabilities (Sabre Red 360 support typically follows 1-3 months later)					
			Shop, price, book, fulfill	Void	Refund	Voluntary Exchange	Seats	Multi-passenger (shop, price, book, fulfill)
DEVELOPMENT	AeroMexico	2Q23	2Q23	2Q23	TBC	TBC	2Q23	2Q23
	Emirates	2Q23	2Q23	2Q23	2Q23	TBC	TBC	2Q23
	Lufthansa Group 4 airlines	1Q23	1Q23	1Q23	1Q23	1Q23	1Q23	1Q23
	American Airlines	2Q23	✓	✓	✓	1Q23	✓	1Q23
	Finnair	1Q23	✓	✓	✓	1Q23	2Q23	1Q23
	United Airlines	In soft launch	✓	✓	✓	1Q23	TBC	1Q23
LAUNCH	Avianca Group 4 airlines	✓	✓	✓	✓	TBC	2Q23	1Q23
	Qantas	✓	✓	✓	✓	✓	✓	1Q23
	Qatar Airways	✓	✓	✓	✓	1Q23	2Q23	1Q23
	Singapore Airlines	✓	✓	✓	✓	1Q23	2Q23	1Q23

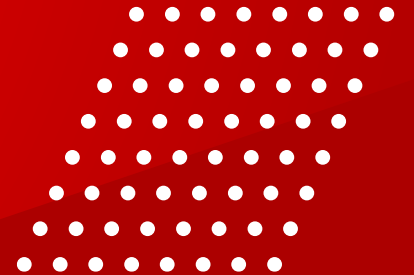


Q&A



# Appendix

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# NDC and You

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# NDC and You: Discussion Questions

1a

**LOOK IN THE MIRROR** | Establish your organizational perspective on NDC

People

Your Travel DNA	<ul style="list-style-type: none"><li>What is your company's travel DNA? Cost driven? Experience driven? Other?</li></ul>
Making Space for NDC	<ul style="list-style-type: none"><li>How does NDC align with your corporate travel program's goals and objectives?</li></ul>
Value Creation	<ul style="list-style-type: none"><li>What goals do you have – experiential, cost savings – and how can different content help you meet those needs?</li><li>What value do you want to unlock with NDC?</li><li>What benefits could NDC help create for your company and your travelers?</li></ul>

# NDC and You: Discussion Questions

1b

**LOOK IN THE MIRROR** | Assess your organization’s readiness for NDC

**People**

<b>Travelers: Primary research</b>	<p><b>Surveys</b></p> <ul style="list-style-type: none"><li>• What are your travelers’ current attitudes about traveling for work and what are their current travel needs?</li><li>• What are their behaviors? What patterns do you see?</li><li>• What is happening outside of normal travel purchases (e.g., WiFi, bags, seats, upgrades, etc.) that you want to measure or understand?</li></ul> <p><b>1-1 deep dive conversations</b></p> <ul style="list-style-type: none"><li>• Conduct some in-depth conversations with a smaller group of travelers to understand “the whys” behind their survey responses and their activity outside of standard travel booking</li></ul>
<b>Travelers: Secondary research</b>	<ul style="list-style-type: none"><li>• Review various “future of work” research reports that have been published in the past year. Hybrid or dispersed workforces will create new travel needs</li></ul>
<b>Business context</b>	<ul style="list-style-type: none"><li>• How are leaders within your organization thinking about budgets?</li><li>• What is HR thinking in terms of duty of care responsibilities?</li><li>• What is leadership’s current attitude toward corporate travel?</li><li>• How will you balance traveler expectations with budget considerations?</li><li>• What travel content is most relevant now? In the next 12-24 months?</li></ul>



# NDC and You: Discussion Questions

1c

**LOOK IN THE MIRROR** | Assess your organization’s readiness for NDC

**Processes**

<b>Budgeting</b>	<ul style="list-style-type: none"><li>• When does budget planning happen and how does that map to the timing of business reviews with partners when NDC may be discussed?</li><li>• What are current funding priorities?</li></ul>
<b>Data</b>	<ul style="list-style-type: none"><li>• What data do you collect today, where, when and by whom?</li><li>• What new types of data – hard data and soft insights – would be helpful in the future?</li><li>• <u>Permissions</u>: what data can you share and not share? What changes may be helpful?</li><li>• Do you have internal data-related expertise, or will you need external help?</li></ul>
<b>Commercial agreements</b>	<ul style="list-style-type: none"><li>• How will commercial agreements change in light of NDC – terms, duration, SLAs, etc.?</li></ul>

# NDC and You: Discussion Questions

1d

**LOOK IN THE MIRROR** | Assess your organization’s readiness for NDC  
**Questions for your travel tech partners**

Existing applications	<ul style="list-style-type: none"><li>• Are existing applications compatible with NDC, including mid and back-office applications?</li></ul>
New applications	<ul style="list-style-type: none"><li>• What new applications may be needed to support NDC?</li></ul>
Technical expertise	<ul style="list-style-type: none"><li>• What are your org’s technical priorities and where would NDC fall on that list?</li><li>• Do your internal technical teams have the bandwidth to engage in NDC development, testing and deployment, or will you need external support?</li></ul>

# NDC and You: Discussion Questions

## 2a **SPEAK UP** | Proactively talk to partners to learn about their NDC plans

### General Questions for Partners

- What are their objectives regarding NDC and how does NDC fit into their larger strategies?
- What is their NDC roadmap?
- What markets and capabilities are they activating and when?
- What data will be shared, and how does message size impact performance?
- How are they influencing industry thinking? Have they engaged in the IATA NDC working groups?
- What pilot programs are they participating in and with whom?
- What are they doing to encourage adoption?
- How will contracts and SLAs be impacted?
- What do you see as the biggest benefit for our program as it relates to NDC content?

# NDC and You: Discussion Questions

## 2b **SPEAK UP** | Proactively talk to partners to learn about their NDC plans

### Questions for Airlines

- What distinctive offers do they plan to make available through NDC connections?
- How do those offers differ from existing ATPCO/EDIFACT content?
- How willing is an airline to create corporation-specific offers?
- How will airlines show you that you're getting great fares, because the benchmarks for measurement will change?
- How will business reporting change?
- Discuss how you will monitor and measure the success of your relationship – a once-a-year RFP likely won't cut it anymore. You need to be thinking about the structure of your quarterly business reviews and really use data and traveler sentiment to guide those conversations.
- Think beyond dollars and cents. What can suppliers do to support health & wellbeing, sustainability and accessibility and how can NDC bring products to life along these lines?

# NDC and You: Discussion Questions

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3	<b>Think about “what if?”</b>	<ul style="list-style-type: none"><li>• Use the traveler research from the “Look in the Mirror” phase to fuel brainstorming conversations with partners about creating new offers that fit your specific needs</li></ul>
4	<b>Get off the sidelines</b>	<ul style="list-style-type: none"><li>• Ask partners if they are conducting NDC pilots and if you can join in to test</li><li>• Asking a few people within your organization to start testing NDC can pay long-term dividends – the first step in your NDC journey doesn’t need to be a full-scale launch</li></ul>
5	<b>Ride the learning curve</b>	<ul style="list-style-type: none"><li>• Ask partners (including the <a href="#">International Air Transport Association</a> (IATA)) about what NDC training materials are available. Enroll yourself and make those resources available to your teams to help them understand NDC</li><li>• Explore opportunities to participate in industry working groups focused on NDC</li></ul>

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