

From: Simonson, Rick
Sent: Mon, 22 May 2017 15:27:36 -0500 (CDT)
To: Sievert, Barry/[Barry Sievert@sabre.com]
Subject: FW: Pre-read materials for Next Generation Product Strategy steering committee
Attachments: 20170522 SC2 Pan-Sabre Product Strategy vF (Main deck).pdf;20170522 SC2 Pan-Sabre Product Strategy vF (Appendix).pdf

From: Anderson, Clinton
Sent: Friday, May 19, 2017 4:10 PM
To: Menke, Sean <Sean.Menke@sabre.com>; Jones, Hugh <Hugh@sabre.com>; Jones, Wade <Wade.Jones@sabre.com>; Alt, Alex <Alex.Alt@sabre.com>; Robinson, Bill <Bill.Robinson@sabre.com>; Samuel, John <John.Samuel@sabre.com>; Simonson, Rick <Rick.Simonson@sabre.com>; Gonzalez, Rachel <Rachel.Gonzalez@sabre.com>; Boyle, Chris <Chris.Boyle@sabre.com>; Lane, Matthew <Matthew.Lane@sabre.com>; Thomas, Robbie <Robbie.Thomas@sabre.com>; Croupe, Christopher <Christopher.Croupe@sabre.com>; Tsai, Chris <Chris.Tsai@sabre.com>; Rosa, Christopher <Christopher.Rosa@sabre.com>; Gasparro, Michael <Michael.Gasparro@sabre.com>; Bennett, Bradley <Bradley.Bennett@sabre.com>; Callaghan, Chad <Chad.Callaghan@sabre.com>; Lee, Charles <Charles.lee@sabre.com>; Naylor, Rachel <Rachel.Naylor@sabre.com>; Boyer, Stan <Stan.Boyer@sabre.com>; Pierce-Mayo, Bridget <Bridget.Pierce-Mayo@sabre.com>; Kellner, Larry <Larry.Kellner@sabre.com>; Harden, Helen <Helen.Harden@sabre.com>
Subject: Pre-read materials for Next Generation Product Strategy steering committee

Please find attached materials for our steering committee meeting on Monday. The main deck is where I would suggest you focus any pre-read effort. I also attached an appendix deck if you want to dive deeper into the details. Looking forward to a great discussion on Monday.

Have a great weekend.
Best,
Clinton

CLINTON ANDERSON | SVP Strategy and Business Development | Sabre |  |  | E: clinton.anderson@sabre.com



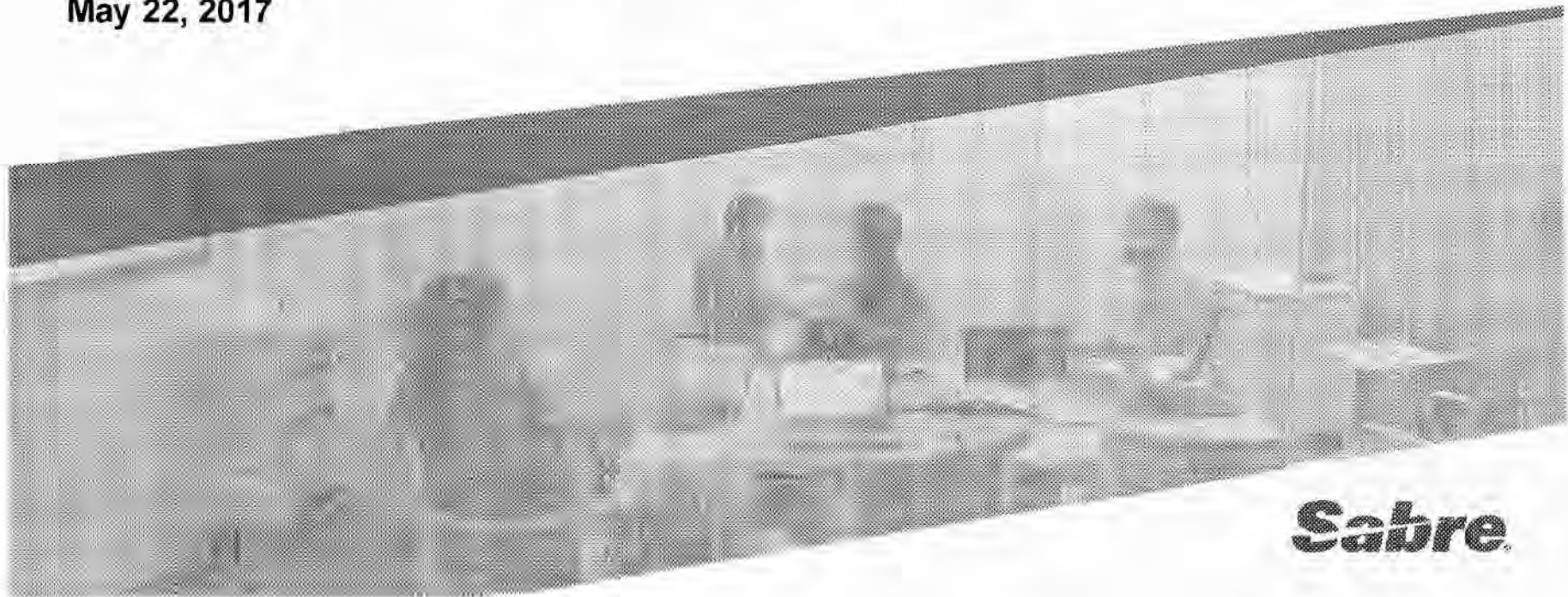
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Pan-Sabre Product Strategy SteerCo 2 Next Gen Retailing & Distribution

May 22, 2017



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Agenda

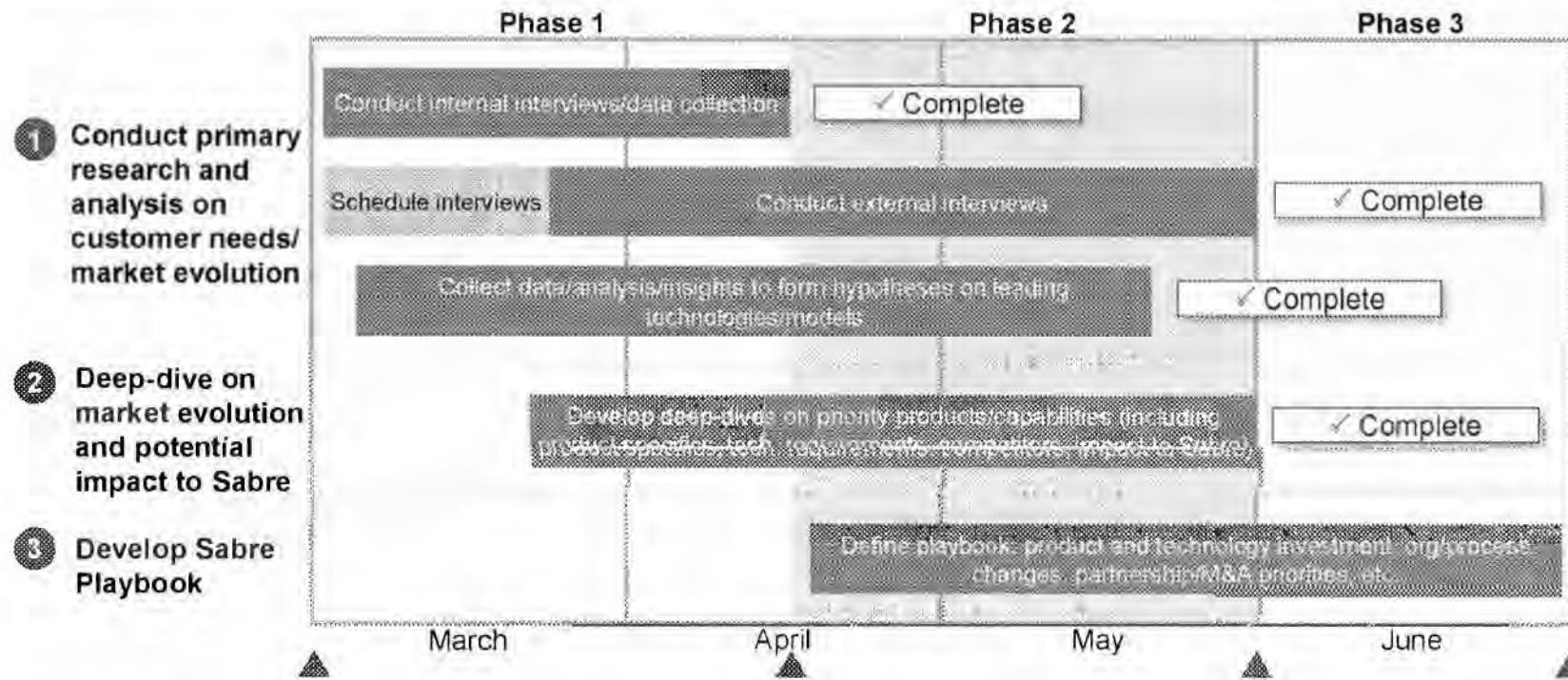
1. **Project timeline**
2. **Executive summary**
3. **Interview insights and use cases**
4. **Next Gen Retailing and Next Gen Distribution**
 - * Technology
 - * Data
 - * Competitors
 - * Commercial
5. **Recommendation**
6. **Next steps**

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Sabre product strategy: Project timeline



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▲ SteerCo meeting

3

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1 Our external interviews validate our hypothesis that Next Generation Retailing (NGR) / Distribution (NGD) are our customers' most critical capability needs in 2 – 7 year time horizon

- Suppliers and agencies consistently desire to provide highly relevant offers to travelers based on trip and traveler insights
- Next Gen Service & Support (NGSS) is an attractive opportunity but remains a lower priority to our customers than NGR and NGD

2 NGR will enable suppliers to deploy increasingly sophisticated retailing capabilities with the goal of increasing conversion, yield and share of wallet. The pace of adoption will be evolutionary as technology becomes available and marketplace constituents adapt over time. NGR creates the need for NGD – suppliers will want to deploy this capability consistently across channels

- Select use cases reflect the most likely NGR/NGD capabilities to emerge in the near term:
 - Rules based segmented offers: suppliers offer discounts and/or create bundled offers based on pre-defined (e.g. frequent traveler status inclusions) or negotiated (e.g. corporate bundles) criteria
 - Dynamic pricing of base fares and ancillaries
 - Cross-selling of other supplier types or non-traditional content (e.g. TSX)
- Emerging in the mid and long terms:
 - Intelligent and dynamically optimized offers based on rich buyer segmentation data and travel context
 - Proactively pushed offers based on triggers, including travel history, Outlook calendars, and forecasted trip disruption
 - Full 1-to-1 customized offers appear unlikely beyond narrow use cases
- The small number of possible ancillary and base fare "ingredients" (~10) limits the complexity of potential offers for a single supplier; however, the magnitude of targeting data, trip context and spectrum of offers in a multi-supplier indirect shopping response creates a need for data where Sabre can add value



3 The full evolution of NGR and NGD capabilities requires four primary pan-Sabre investment areas:

1. NGR: Offer Engine - Optimizes and publishes offer, price, channel & display combinations; orchestrates order fulfillment
2. NGR: Data Services - Fuels the Offer Engine by passing, pulling, storing, and analyzing trip/market data in real-time
 - Data richness and more open data sharing will be critical to the success of NGR/NGD
 - Intermediaries (Sabre/Amadeus in particular) are uniquely positioned to provide trip context data to suppliers/agencies and also deliver real-time market performance to enhance conversion
3. NGD: Orchestration - Routes and throttles requests in a world of next gen and traditional shopping duality; aggregates offers and rich content for display; manages order requests
4. NGD: Connectivity - Provides standardized (e.g. NDC type) XML connectivity between all Sabre and non-Sabre NGR/NGD solutions

4 Current business unit roadmaps do not put us on a path to fully deliver these solutions

- Investments have been limited to areas including unique XML connections with specific airlines and their tech partners (i.e. Farelogix), dynamic availability with limited customers, and rules-based dynamic retailing capabilities for Sabre CSS and airline direct channels
- Sabre has access to a large amount of data to support a unique data service, but today's shopping technology does not frequently leverage data elements that are required to build customized offers, including frequent flyer number/status

5 Competitors continue to invest in basic NGR/NGD functionality, however, no competitor has moved beyond simple rules-based offer engines primarily used for ancillary bundles and ancillary pricing (we are losing in the field of "thought leadership" and are probably two years behind on product)

- Farelogix has developed a rules engine to create offers and a connectivity layer with direct and indirect channels
 - Farelogix is playing a vocal thought-leader role, driving the industry direction in a way not maximally aligned with Sabre
- Amadeus has embraced NDC (in terms of customer engagement) and is active in working sessions, allowing them advantages in driving industry standards and share of customer mind and wallet
- To a lesser degree, Datalex and other competitors are growing from a place of providing niche technology and embracing NDC



Executive summary

(3 of 3)

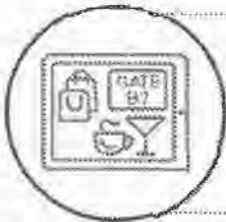
- 6 Investing in NGR/NGD capabilities will migrate Sabre closer to "customer acquisition / market insights" economics as opposed to "transaction processing / technology" economics. Investing in NGD alone likely weakens our industry position.
 - In general, Sabre receives higher overall economics for *facilitating* customer acquisition (average GDS segment fee is [REDACTED] versus transaction processing (average PSS PB fee is [REDACTED])
 - In both the GDS and PSS businesses, Sabre is experiencing price pressure as a lack of powerful innovation is causing these services to be increasingly viewed as transaction processing
 - Enriching a supplier's insights on the nature of demand, enabling the supplier or agency to tailor offers across all channels, and then, delivering data-rich real-time feedback on performance of offers in the direct channel or market performance in intermediated channel would generate significant benefits to suppliers in optimizing customer acquisition, conversion, and delivery of market insights
- 7 Emerging investment recommendation is to actively invest to develop NGR and NGD capabilities in parallel
 - Sabre should invest in NGR Offer Engine and Data Services in parallel
 - Opportunistically partner with early movers who can use the data models of NGD and XML to develop intelligent offer algorithms
 - Support current AS capabilities that pave the way for NGR and invest in new capabilities aligned with future vision (level and pace of investment will be determined in Phase 3 of this project)
 - Sabre should invest in standard NGD connectivity and orchestration
 - Sabre should expect to bear the cost of NGD investment, but may be able alleviate pressure on GDS booking fees in near term
 - With NGD, Sabre creates technology that will support NGR and expand our ability to offer a broader set of supplier services
 - Next Gen Service & Support (NGSS) is an important emerging technology and Sabre should continue testing and learning in this space
 - Currently, an agency POC is being developed with [REDACTED] and a hotel POC is being developed for [REDACTED]
 - Next Gen Order management should be addressed in the design of NGD, but full resolution of this issue is likely years away
- 8 Next steps for team are to develop detailed playbooks for investment, expected economics, and customer engagement

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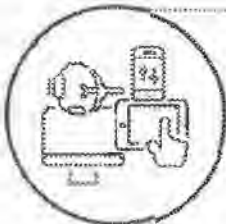
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External interviews validate hypothesis that Next Generation Retailing / Distribution are our customers' most critical capability needs



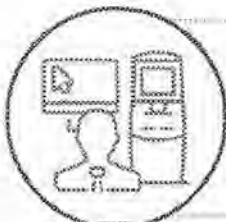
Provide highly relevant offers to travelers based on the information known about them and their trips

Next Generation Retailing



Display travel products the way suppliers want consistently across channels; let them select which channels can access specific content

Next Generation Distribution



Ensure simple, seamless booking and service experiences for the traveler and the service provider across the trip

Frictionless Travel



External interviews confirm that our customers expect Next Generation Retailing / Distribution capabilities to create new value and see a role for Sabre as an enabler

Suppliers
Agency
Corporation



"Today, we have a sledgehammer in how we make offers – we need to **leverage data to limit and target offers to be successful**"

- Ted Christie, CFO, Spirit



"We want to create a marketplace. It's not just about monetizing our hotel rooms, it is about growing revenue through new services"

- Laurent Idrac, CIO, AccorHotels



"We want to be able to reach out to customers with a **unique product offering and show that offer in the way that we want it displayed**"

- Markus Binkert, RM, LHG



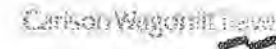
"Players who can **leverage their data to drive conversion/yield** will see a big bottom line impact"

- Christophe Tchong, VP, Product, AMEX



"We'd love to be able to **configure our own bundles and offers** based on what we know about a user and their behavior"

-Adam Goldstein, CEO, Hipmunk



"We're developing inventory, give us a flexible platform that **allows us to conduct agency retailing**"

- CWT Valkre Interview



"We are starting to think about the **right answer for our travelers, not just the cheapest answer**"

- Jack Eichhorn, Oracle, Corp. Travel



"What's driving us is how can I **make the experience as frictionless as possible** for the traveler"

-Rob Fulnecky, Cisco, Corp. Travel



"In the new world you don't need to own the content, just be smart enough to **make the connection for the traveler**"

-Dan Maschoff, Accenture, Corp. Travel

Suppliers envision delivering more targeted offers and optimizing offers across the traveler journey

Suppliers desire improved yield through new demand, higher conversion, and increased share of wallet



Today's revenue management, distribution channels, and points-of-sale do not allow them to realize this vision today



Five primary personas and their related travel journey use-cases highlight capabilities that suppliers are looking to implement



Frequent Business Traveler

"Make my life easier"

- 28 trips per year, often to same destinations
- Books through corporate booking tool
- Policy compliant
- High airline status



Infrequent Business Traveler

"Help me know what I should book"

- 4 trips per year
- Books through corporate booking tool
- Policy compliant
- Little to no airline or hotel status



VIP Business Traveler

"I need help creating the right itinerary"

- 19 trips per year
- Books through admin or VIP desk at TMC
- Flexibility and schedule drives all decisions
- High airline and hotel status



Unmanaged Business Traveler

"I need to find the best deal"

- 7 trips per year
- Books through an OTA or supplier direct
- Budget-based travel program
- Little to no airline or hotel status



Family Booking a Vacation

"I need simple and at a low price"

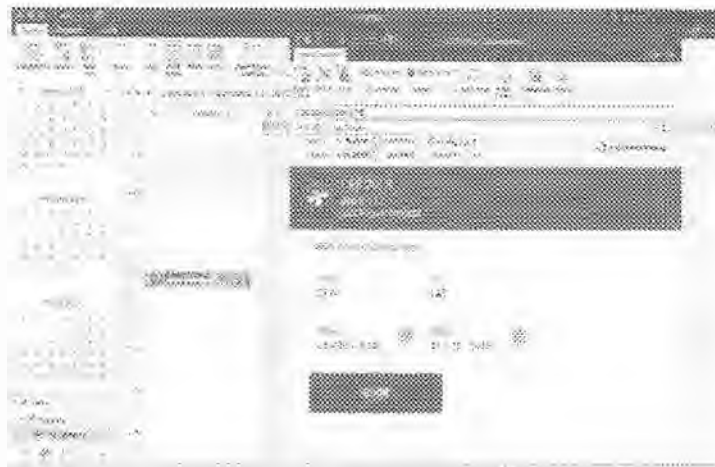
- 2 family trips per year
- Books through an OTA
- Pricing is the driving factor for most decisions
- Mother is mid-tier airline status

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Frequent Business Traveler – “Make my life easier”



Booking from calendar

- Proactive offer based on scheduling a meeting in Microsoft Outlook
- Flight recommendations are made in Outlook based on previous trips, company policy, and colleague travel patterns

Bleisure-based offer

- Proactive offer via email to purchase a discounted airfare for a companion traveler, or a weekend extended stay (including display of savings for company)
- Easy one-click book directly via the email

Dynamic pricing - ancillaries

- Longer than normal queuing times/airport traffic
- Offer via airline app en route to airport to purchase priority boarding

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Infrequent Business Traveler – “Help me know what I should book”



Corporate Booking Tool

Flight Results

\$425 \$505 \$1280

2 2PM - 6 00PM 1 4PM - 3 00 1 00AM - 11 00

Your Custom Bundle

\$45

ADD TO BUNDLE ADD

Negotiated bundle

- Company-specific air bundle is displayed
- Bundle shows total savings over a la carte

Corporate Booking Tool

Hotel Results

The Roosevelt \$154.00

Yotel at Times Square \$178.00

Park Central \$210.00

Chelsea Hotel \$235.00

Affinity recommendation

- Initial shop returns all company preferred hotels
- One is highlighted as most frequently booked by his/her colleagues



Bleisure-based offer

- This is a new personal destination
- Receives an offer to extend the trip with a hotel, and a second offer for a half-day city tour



Unmanaged Business Traveler – “I need to find the best deal”



Persona-based offer

- Based on profile data and flight search parameters a persona-based offer is delivered
- Bundle shows value over market



Supplier cross-sell

- Receives a discounted hotel offer prior to purchase
- Hotel receives positive reviews, is often selected by business travelers, and is validated as a good price relative to other hotels and travel sites



Traveler-led bidding

- En route to airport, traveler submits a bid for a seat upgrade
- Notified via text that offer was accepted

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VIP Business Traveler – “I need help creating the right itinerary”



The screenshot shows the Sabre Red Workspace interface. At the top, there are navigation tabs: Sabre, Sabre Red Workspace, FAVORITES, TOOLS, COMMUNITY, and RED APP CENTER. Below the navigation, there are search filters for 'Home', 'Home', 'Home', and 'Home'. A user profile for Michael Paragoric is displayed, including a photo and contact information. Below the profile, there is a section for 'My Itinerary' with a 'View' button. A table of flight options is shown, with columns for 'Airline', 'Flight Number', and 'Price'. The table lists flights from British Airways and United.

Airline	Flight Number	Price
BRITISH AIRWAYS	BA111	\$2150.00
UNITED	UA123	\$1875.00
UNITED	UA456	\$1925.00

Dynamic offer

- VIP desk agent is contacted for an upcoming international trip
- Based on preferences and travel history, a custom itinerary is developed

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The screenshot shows the Sabre Red Workspace interface with a prominent 'Special Offer: Deeply Discounted World Business Class' banner. The banner includes an image of a business class cabin and a price tag of \$2249. Below the banner, there is a section for 'Rounding Up' with a 'View' button. The interface also shows navigation tabs at the top: Sabre, Sabre Red Workspace, FAVORITES, TOOLS, COMMUNITY, and RED APP CENTER.

Competitive offer

- Receives an offer from another carrier for a deeply discounted upgrade to new business class experience
- Rich media highlights the new features and experience

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Family Vacation – “I need simple and at a low price”



Recurring trip

- Receives proactive offer from OTA that it is time to book typical summer beach trip
- Offers presented are based on travel history, not limited to just purchases through the OTA



Dynamic offer

- Shops in OTA for trip to typical beach destination
- Receives special offer for a new beach destination which includes air, hotel, airport transfers, and option to upgrade to premium economy with miles

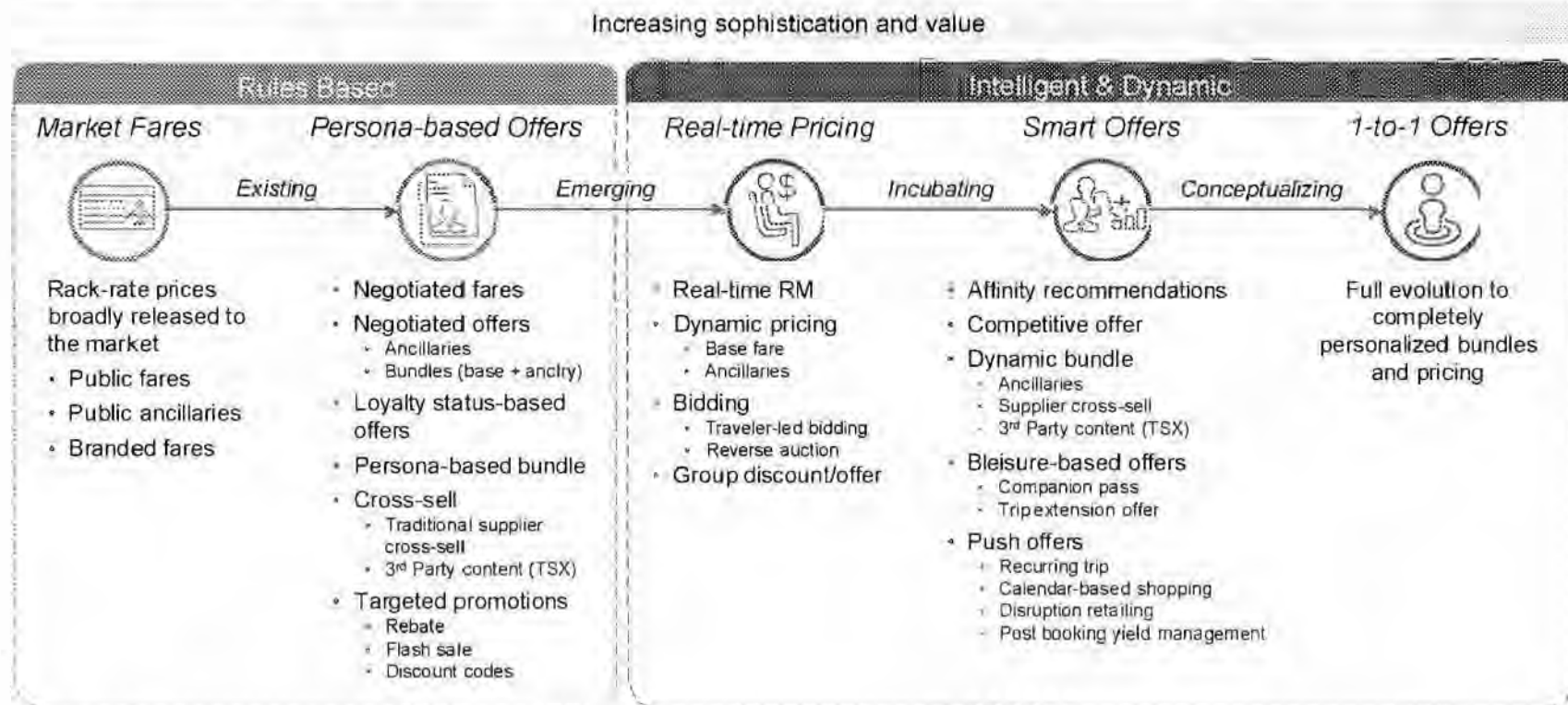


Push offer

- En route to airport notification that there is a flight delay
- Presented with a discounted lounge pass and offer for ground transport at destination



The spectrum of retailing strategies from the use cases extends from simple rules-engine based offers to more intelligent retailing paradigms fueled by AI



As content increases, the complexity in managing the offers will increase substantially, creating an area where Sabre can generate value

With a restricted slate of ancillary choices, offer complexity appears to be manageable



- Upgraded seating
- Bags
- Priority boarding
- Expedited security
- Wi-Fi
- Meals



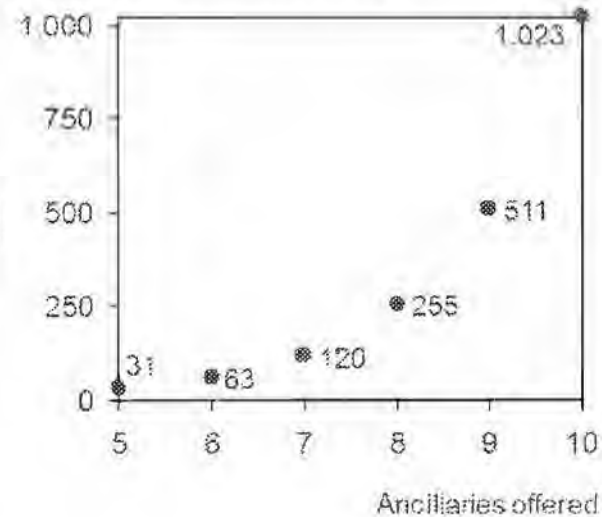
- On-site restaurant
- In-room dining
- Room location
- Wi-Fi
- Spa package

5 ancillary options yield
31 potential combinations of
ancillary bundles

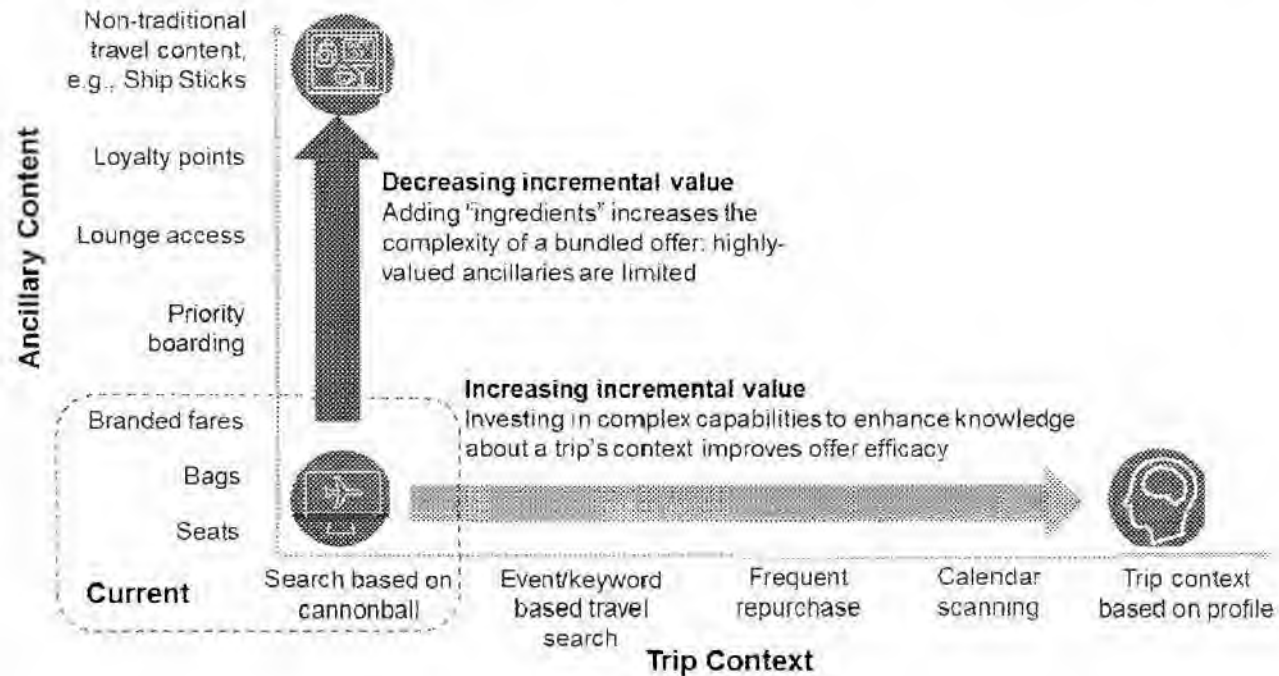
Notes: Assumes that at least one ancillary is sold in each bundle

But with each new ancillary added, complexity increases exponentially

Potential combinations of offers



Indirect distribution platforms with complex context interpretation create more supplier value than rules-engines with additional ancillary “ingredients”



Next Gen Retailing can be broken up into near-term and long-term opportunities based on value creation versus implementation feasibility



Technology architecture, data capabilities, competitors' moves, and commercial concerns factor into the design and urgency for an investment in NGR supported by NGD

Technology	Data	Competitors	Commercial
<ul style="list-style-type: none"> • NGR retailing capabilities will emerge and mature • NGR technology needs include sophisticated offer engines and dynamic pricing across channels • NGD XML message connectivity and orchestration enable NGR • Sabre investments to-date and roadmaps are not sufficient 	<ul style="list-style-type: none"> • Data richness and more open data sharing will be critical to the success of NGR/NGD • Intermediaries are uniquely positioned to provide trip context data to suppliers/agencies and deliver real time market performance to enhance conversion • Data used in current shopping paradigms is not sufficient to enable NGR (e.g. FF# used <1% of shops) 	<ul style="list-style-type: none"> • Competitors continue to invest in basic NGR functionality and NGD aligned to NDC • Competition has not moved beyond rules-based offer engines primarily used for ancillaries • Competitors are clearly owning thought-leadership and market voice • Farelogix and Amadeus are the primary players; to a lesser degree, Datalex • Amadeus is the only pure-play for Sabre; able to provide full NGR/NGD 	<ul style="list-style-type: none"> • AS PB and TN booking fee pressure necessitates change • NGD XML connectivity investments must occur to secure content but do not create value from Sabre • Investing in NGR will migrate Sabre closer to "customer acquisition / market insights" economics as opposed to "transaction processing / technology" economics

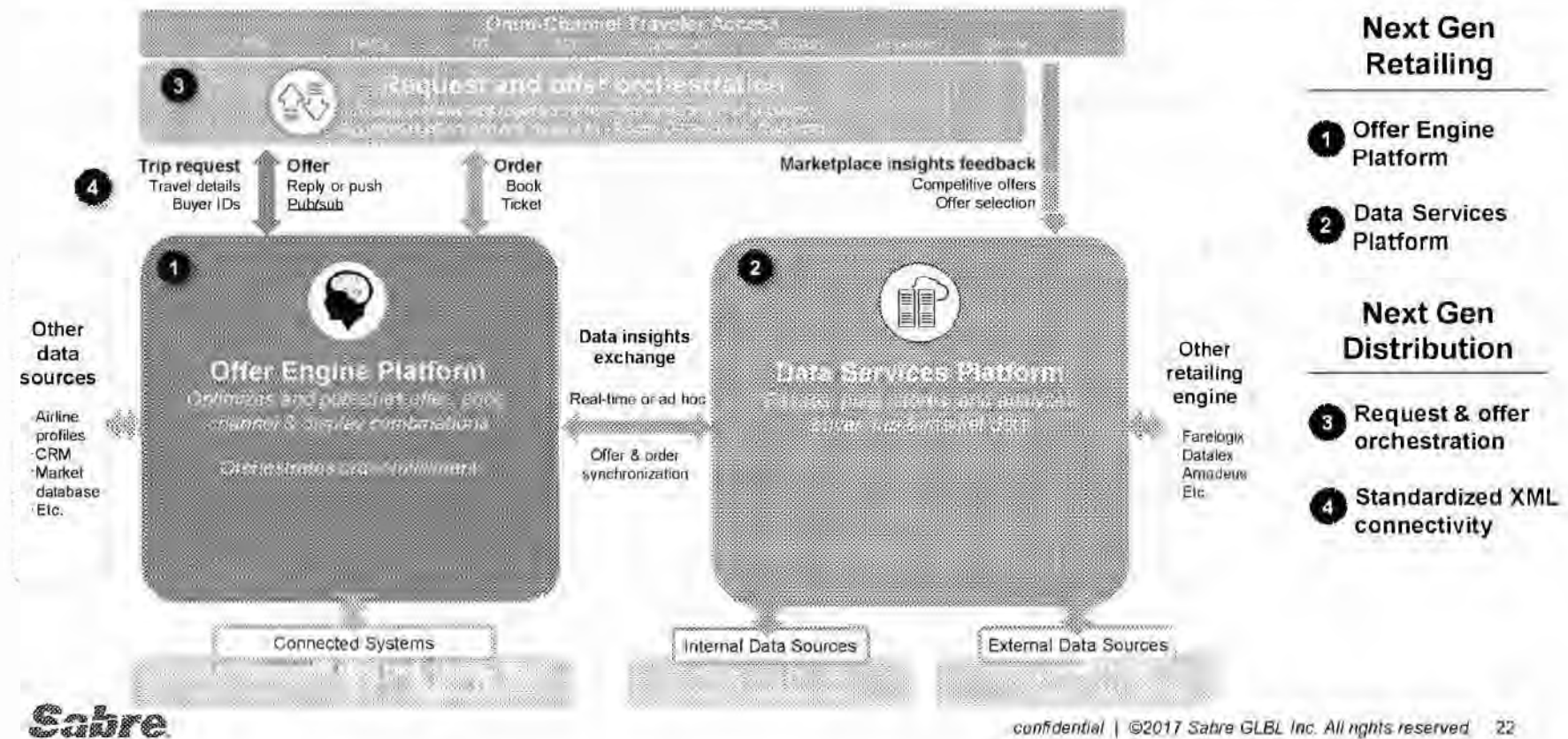


Guiding NGR principles should be used to inform a standardized NGD design, rather than building customized functionality and modifying for NGR

<u>Principles for NGR development</u>	<u>Implications on NGD design</u>
<p>Standardized</p>	<ul style="list-style-type: none"> • Limited custom development; if custom work occurs, build as modular components
<p>Platform-based Modular, flexible, cross-channel</p>	<ul style="list-style-type: none"> • Centered on broadly accepted tech and retailing capabilities integrating with indirect and direct channels • End-to-end integration with Sabre CSS
<p>Data maximizing Ingests and improves with richer data</p>	<ul style="list-style-type: none"> • Feeds traveler and market data repositories, including traveler history across carriers at an offer-by-offer level • Potential feedback loop for real-time offer inputs based on traveler and market conditions
<p>Pan-Sabre Beyond air</p>	<ul style="list-style-type: none"> • Use cases and partners for building should be selected beyond most-pressing air renewal customers



The full evolution of NGR/NGD capabilities requires four primary pan-Sabre investment areas:
NGR: Offer Engine & Data Services | NGD: Connectivity & Orchestration



There is a gap in the insights that we gather today versus what is needed to enable next gen retailing

Current shopping request provide limited insights into the traveler for personalized offers

- 1 Origin & destination
- 2 Travel dates
- 3 Vendor/product preferences
- 4 Customer loyalty information



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The future of travel retailing requires eCommerce level insights and analytics

- **Market:** Real-time market insights



- **Buyer:** Predictive analytics based on search/purchase

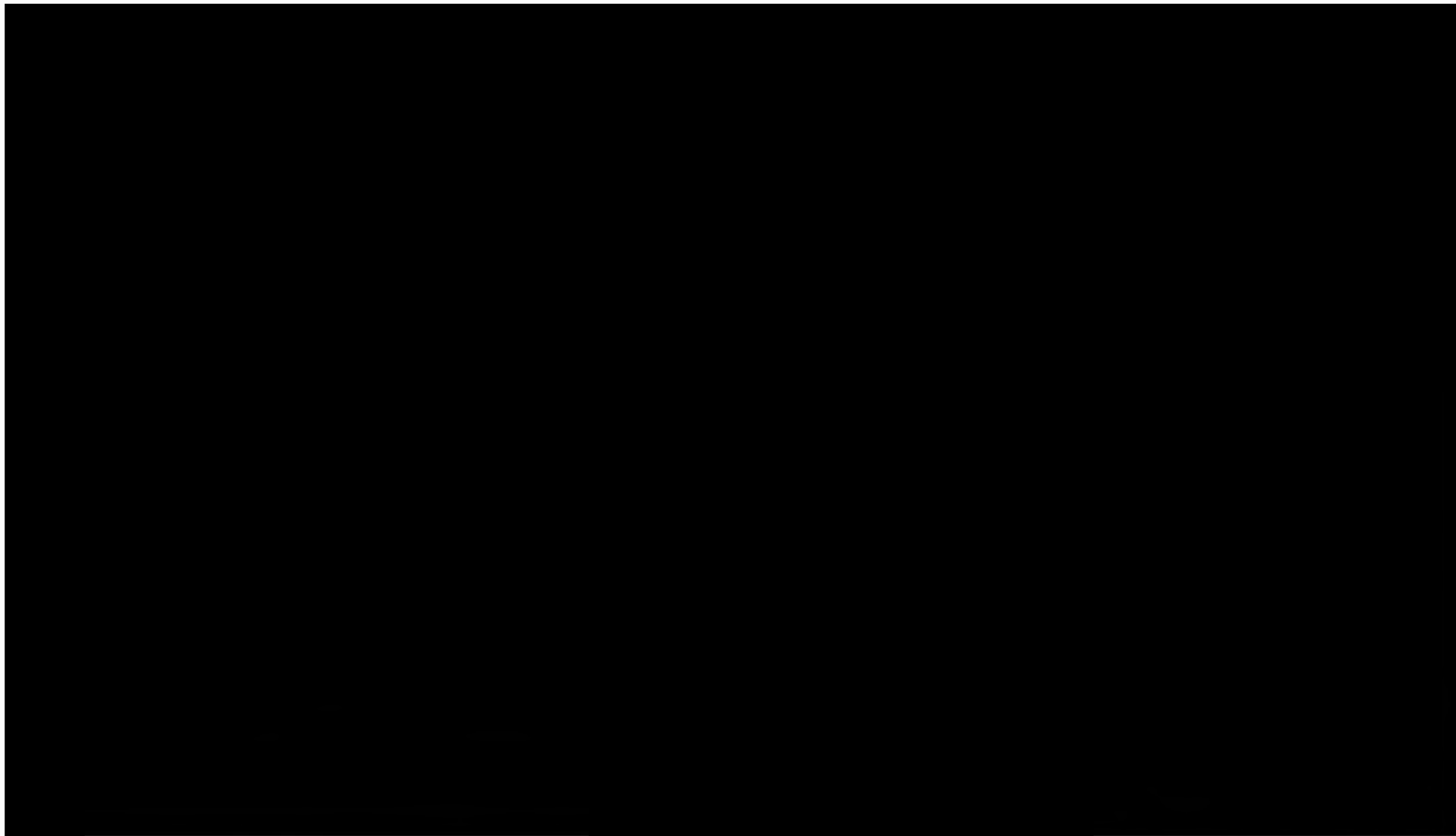


- **Trip:** Enhanced context from external data



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NGR offer paradigms require advanced analysis and real-time access to buyer/traveler, market and trip context data elements

NGR Offer Engine results are a function of the data available at time of offer



Sabre is in a unique position to aggregate insightful traveler data; however, questions around data rights and technological feasibility remain

Area of Focus: Sabre has limited high-value data available today

Available today	<ul style="list-style-type: none"> • Buyer ID (FF#) • Business ID (agency/corp) • Macro-shopping data (aggregate)
In development	<ul style="list-style-type: none"> • Customer value scores (RFM) • Previous travel purchases
Unavailable	<ul style="list-style-type: none"> • Micro shopping data (persona) • Individual shopping history • Real-time win/loss performance • Cookies • Calendar / events

Key actions to assess path forward for acquiring and utilizing data that is not available today

Business	<ul style="list-style-type: none"> • Identify data-centric use cases • Assess uniqueness of data and resulting value implications
Privacy and Regulation	<ul style="list-style-type: none"> • Understand data rights and permissions • Develop incentives and build trust and credibility
Technology	<ul style="list-style-type: none"> • Determine technical capabilities required to unlock value of data









Notes: In development: Airline Solutions is working on customer value scoring as a component of the Customer Analytics product to provide individual insights based on matching profile algorithms. This information would tie back to the previously identified travel purchases.

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Current Sabre solutions create a foundation but do not put us on a path to fully deliver next gen retailing and data capabilities

	 Airline Solutions	 Travel Network	 Hospitality Solutions
 Next Gen Retailing	<ul style="list-style-type: none"> • Interline branded fares and ancillaries • Dynamic Availability • Rules-based Dynamic Retailer • Dynamic Rewards • Revenue Optimizer • Fare Promotions 	<ul style="list-style-type: none"> • SRW Red Apps 3.0 • Agency Retailer (ARRO) • Travel Insight Engine 	<ul style="list-style-type: none"> • Guest Experience (GX) with rules-based dynamic personalization • Retail-focused booking engine design • <u>Partnerships</u>: Nor1, Sojern, TripTease, WayBlazer, and Life Happens
 Next Gen Data Services	<ul style="list-style-type: none"> • MIDT & GDD -- Global Demand Data • Shopping Data • Market Fare View • Sabre Intelligence Exchange • Customer Data Hub • Competitive Intelligence Hub • Customer Experience Manager • Travel Data Batch / Streaming 	<ul style="list-style-type: none"> • MIDT • Shopping Data • Contract Optimization Services • Traveler Security & BI Suite • Sabre Authorized Developer Billing Reports (Concur, Deem, NuTravel and others) 	<ul style="list-style-type: none"> • New profile system and profile types • Customer Value Calculator and RFM scoring • Performance Insights • Air Insights and Guest Insights • Data Warehouse-as-a-Service • Cached shopping data
 Next Gen Distribution	<ul style="list-style-type: none"> • Integration with Dynamic Retailer • Offer management 	<ul style="list-style-type: none"> • XML connectivity for ancillaries • XML connectivity for base fares • Hybrid shopping platform 	<ul style="list-style-type: none"> • Availability Rates and Inventory (ARI) refactoring • Multiple loyalty system integrations • Next Gen Booking platform



1. RFM Scoring : Recency, Frequency, and Monetary Scoring



New and traditional competitors provide NGR/NGD capabilities; Farelogix and Amadeus are the most relevant threats with others providing more limited technology

Full NGR / NGD
Offer Engine / Data Services / Connectivity

Have the ability to deliver offers through both the direct and indirect channels



Partial NGR / Full NGD
Offer Engine / Connectivity



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Limited Solutions

High market traction



Other solutions available



Farelogix and Amadeus are proactively messaging retailing solutions to the market and providing thought leadership

Farelogix

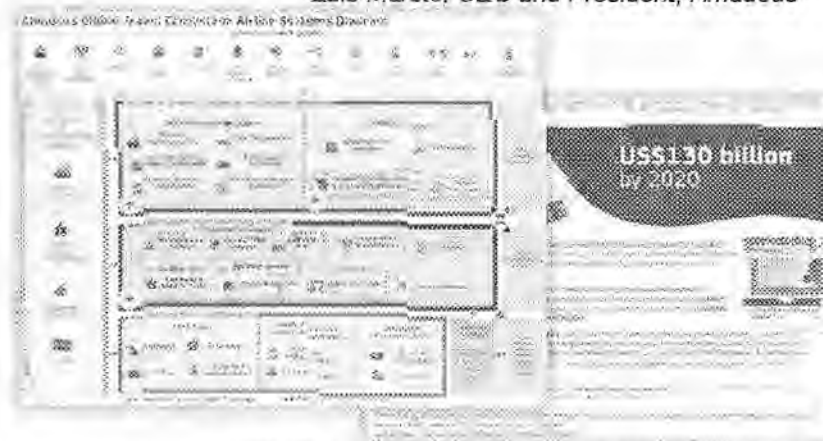
- **Stated Goal:** To create transparency in the marketplace and give airlines full content control
- "Dynamic offers, personalized real-time bundles, inventory-controlled corporate products are quickly becoming the new norm."
– Jim Davidson, CEO Farelogix



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Amadeus

- **Stated Goal:** To reach "US\$ 130 billion [in transactional revenue] by 2020", a campaign underpinned by the **development of the new Amadeus Global Merchandising System** and the evolution of the Amadeus Global Retailing and Distribution Systems.
- "The global travel industry... **requires a fundamental change to the way in which travel is sold and how the traveler is served**"
– Luis Maroto, CEO and President, Amadeus



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Farelogix is providing NGR/NGD capabilities for a few significant carriers and offer four main products

FLX Shop & Price

- Shopping, pricing, and offer engine designed for high volume, personalized NDC-aligned offers
- Prices offers based on airline-defined rules; FF #, CRM data, and AI/Predictive analytics
 - AI/Predictive analytics provided by Triometric

FLX Open Connect

- PSS-agnostic direct connect with full orchestration for offer and order management, ticketing, ARC/BSP, and more
- Farelogix is already connected to and compatible with the following PSS/Airline Host systems: Amadeus Altea, Sabre Multi-Host, Worldspan, Galileo Airline Host, HP Shares, HP Atraxis, IBM RES III, Mercator/Mars, and Navitaire

Farelogix Airline Customers



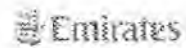
FLX Merchandise

- Airline-controlled merchandising and rules engine with "unlimited flexibility for custom-tailored offers"

FLX NDC API

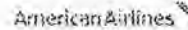
- Robust delivery of an airline's full suite of content to any/all sales channels
- FLX API that pushes/receives offers and orders

Airlines see Sabre as resistant to distribution innovation, while competitors are messaging investment in new technologies



"I am not satisfied that the GDS systems of distribution an offer are fit for purpose in the next five or ten years..."

-Tim Clark, President of Emirates, Sept 2016, Tnooz article



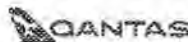
"This is really all about tapping into the willingness to pay for existing product that's difficult to get at given the current distribution model which just shows the lowest fare."

-Don Casey, Sr VP Revenue Management, AA, Jan 2017, Q4 earnings call



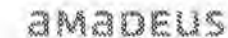
"The nature of the relationship between GDSs and airlines is not sustainable and we want to get that changed"

-Willie Walsh, CEO BA, May 2017, Beat article



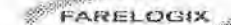
"We are surprised that Sabre is this far along in [NGD] thinking. We didn't expect this meeting to be productive."

-Rainer Bauer, Sales Distribution & Planning, Qantas, April 2017



"Our full content the way it is defined needs to evolve."

-Luis Maroto, Amadeus CEO, Feb 2017, Q4 earnings call



"Full content is a manufactured condition by the GDSs ... 'the one-size-fits-all' nature of full content just doesn't work."

-Jim Davidson, Farelogix CEO, March 2017, Beat article



"I think that full content, as it used to be defined, is becoming an out-of-date concept."

-Gordon Wilson, Travelport CEO, May 2017, Skift

NGR and NGD together create value for the ecosystem; alone, NGD shifts control to airlines and weakens the GDS value proposition

- NGR creates price opacity
- Airlines' appetite for NGD is based on control; as an airline gains control of offers, the value of the intermediated channel will decrease
- However, in a world where airlines create customized bundles and price opacity increases, traveler, trip, and shopping data become incredibly important
- The market information available through the GDS is the best source of customer and shopping insight

Enabling NGD ahead of participating in NGR significantly diminishes the value of the GDS channel

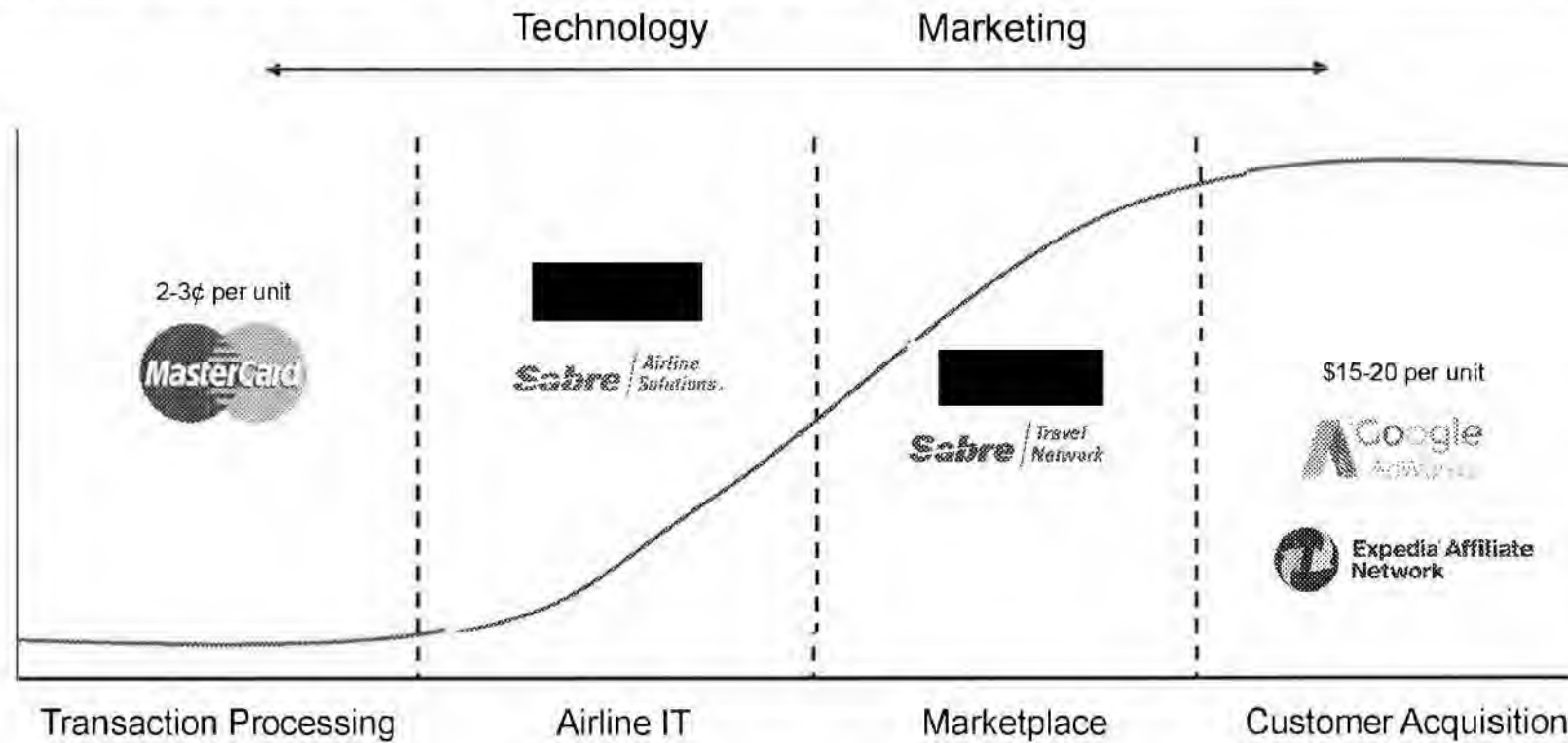
NGR developed alongside NGD allows Sabre to participate in direct and indirect NGR, significantly increasing the value of the GDS channel

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Sabre's ability to capture a fair share of the opportunity value will likely depend on which value proposition we pursue



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Emerging investment recommendation is to actively invest to develop NGR and NGD capabilities in parallel



Sabre should **invest in NGR Offer Engine and Data Services**

- Opportunistically partner with early movers who can use the data models of NGD and XML to develop intelligent offer algorithms
- Support current AS capabilities that pave the way for NGR



Sabre should **invest in standard NGD connectivity and orchestration**

- Sabre should expect to bear the cost of NGD investment but may be able to use these capabilities to alleviate pressure on GDS booking fees
- With NGD, Sabre creates technology that will support NGR and expand our ability to offer a broader set of supplier services



NGSS is an important emerging technology and Sabre should **continue testing and learning** in this space

- Currently, an agency POC is being developed with [REDACTED] and a hotel POC is being developed for [REDACTED]



Next Gen Order management should be addressed (and portions likely will via NGD), **but full resolution of this issue is likely years away**

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[REDACTED]

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Recommended sequencing / approach

Our plan of attack is to:

- **Fully commit to an NGR / NGD vision** and develop a perspective on the point of arrival
- **Determine required investment and expected commercial model / returns**
- **Develop a communication and customer engagement campaign**
- **Build a plan to sequence investment, partnership, customer engagement, and product development** to achieve our vision over the next 5 years
- **Pursue a phased investment approach** that takes into account new technology investment, as well as TN and AS investment that is informed by the future view of NGR / NGD
- **Partner with forward-thinking suppliers and agencies** to build POCs to test and learn
- Be proactive with our messaging to **become the leading voice** in this space

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Next Steps – “Playbook”

1. Develop “Playbook” for NGR, including:
 - Products/ capabilities’ development/ investment plans
 - Technology/ investment requirements
 - Necessary process/ org changes
 - Partnership/ M&A
 - Investment/ sequence/ timing
 - Economic model and potential customer pipeline
 - Standards building/ industry participation (e.g. strategic alliances, NDC working sessions)
2. Define near-term marketing message and high-level communications plan related to NDC and NGD / NGR investments to address Sabre’s marketplace reputation and competitive position
 - Includes supplier and buyer messaging
 - Internal communications (rollout)
3. Accelerate the NGD stream within TN to support the delivery of standardized XML connectivity and request / offer orchestration, aligned to NGR





Pan-Sabre Product Strategy SteerCo 2 Next Gen Retailing & Distribution

Presentation Appendices
May 2017

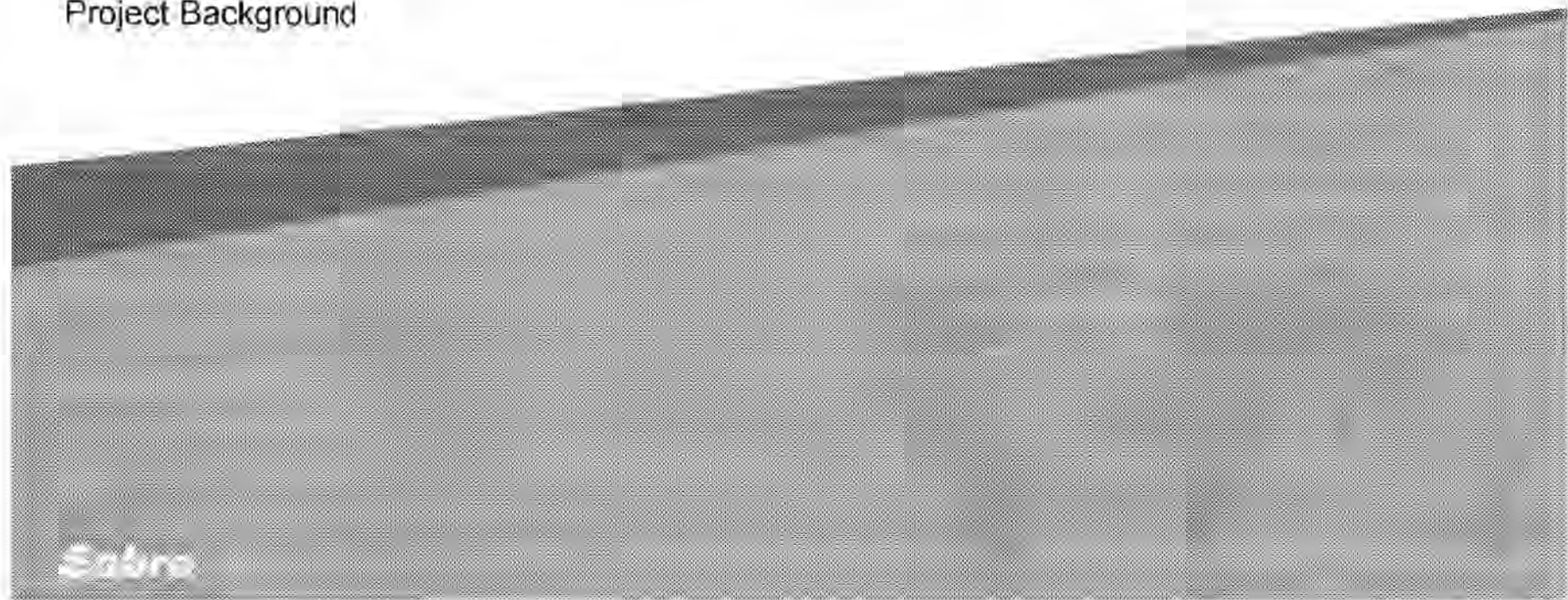


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Appendix

Project Background

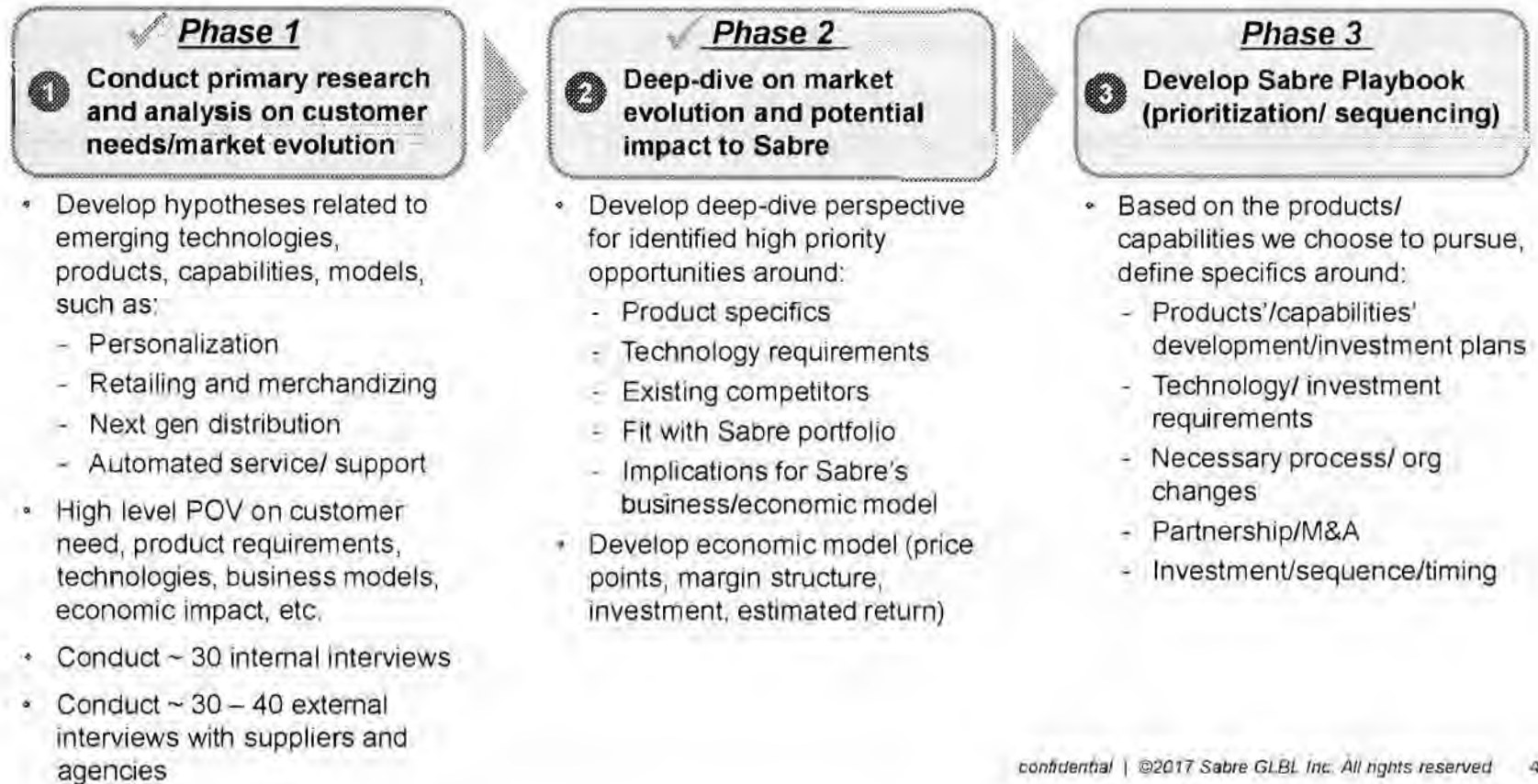


Transformation framework: potential pace and sequence

Initiatives in progress			For later consideration		
Sabre product strategy <ul style="list-style-type: none"> • Determine future product needs • Define product priorities • Develop strategy for emerging technologies/ business models <p><i>February - July</i></p>	Technology full potential <ul style="list-style-type: none"> • Improve operational reliability • Modernize our infrastructure • Create scale efficiencies with common services/APIs/ platforms/tools <p><i>On-going</i></p>	P&T org realignment <ul style="list-style-type: none"> • Design and implement future P&T organization <p><i>On-going</i></p>	Product mgmt. / development <ul style="list-style-type: none"> • Dev framework (flexible/fit for purpose) • Design for modularity • Use common components • Best practice product mgmt. • Optimize our portfolio <p><i>TBD</i></p>	Commercial capability <ul style="list-style-type: none"> • Proactive sales/ marketing • Effective sales enablement • Prioritized products/ accts • Strategic resource allocation • Efficient sales ops <p><i>TBD</i></p>	Go-to-market model <ul style="list-style-type: none"> • Define which products, which customers • Design and implement go-to-market model <p><i>TBD</i></p>



Sabre product strategy: Key project activities



>65 internal SMEs interviewed for product strategy project

BU	SME Name	Completed?	BU	SME Name	Completed?	BU	SME Name	Completed?
AS	Hugh Jones	✓	SHS	Frank Trampert	✓	TN	Lindsey Parker	✓
	Vinit Doshi	✓		Richard Wiegman	✓		Emma Wilson	✓
	Surj Ramlogan	✓		St. John Murphy	✓		Miguel Gonzalez	✓
	Greg Gilchrist	✓		Robert Dawson	✓		Jerome Thil	✓
	Darren Rickey	✓		Brian Jorgenson	✓		John Elieson	✓
	Dasha Kuksenko	✓		Alex Alt	✓		Florian Tinnus	✓
	Dino Gelmetti	✓	TN	Chad Tibor	✓		Constantine Hallax	✓
	Stan Boyer	✓		Alessandro Ciancimino	✓		Sean Arena	✓
	Hari Subramanian	✓		Hoong Mau Ho	✓		Allison Colquhoun	✓
	Mike Reyes	✓		Jason Toothman	✓		Julian Macagno	✓
	Rodrigo Celis	✓		Dave Moore	✓		Shelly Terry	✓
	Rick Dietert	✓		Justin Ricketts	✓		Kathy Morgan	✓
	Chris Donnellon	✓		Dustin Downing	✓		Traci Mercer	✓
	Kate McClendon	✓		Brett Burgess	✓		Chris Wilding	✓
	Mike Preiser	✓		Dirk Guenther	✓		Wade Jones	✓
	Pramod Jain	✓		Becky French	✓	P&T	John Samuel	✓
SHS	Sarah Kennedy	✓		Joni Reeves	✓		Ben Vinod	✓
	Hani Joakim	✓		Rebecca Robinson	✓		Richard Ratliff	✓
	Eben Hewitt	✓		Randal Beasley	✓		Ben Newell	✓
	Balaji Krishnamurthy	✓		Gary Millward	✓		Mark McSpadden	✓
	Jessica Wood	✓		Steve Gillon	✓	Legal	Robin Everly	✓
	Fred Veliyev	✓		Jay Jones	✓	Corp	Marilyn Townsend	✓
	Chris Donnellon	✓		Stacy Mullen	✓		Chris Boyle	✓
	David Meltzer	✓						

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22 external interviews conducted for product strategy project

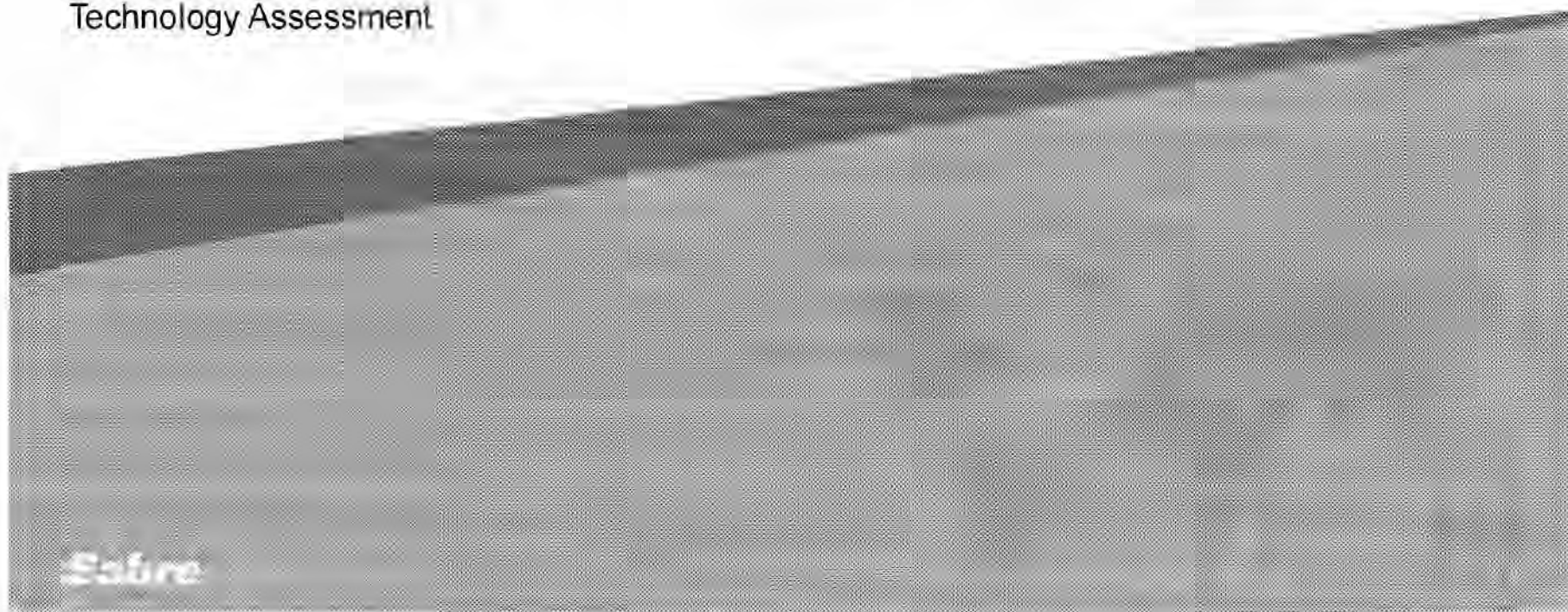
Airlines			Hoteliers			Corporate/Agencies and Other		
BU	Company	Interviewees	BU	Company	Interviewees	BU	Company	Interviewees
Airline	IAG	Jerry Dunn – Group Manager Sales & Distribution	Hotels	Marriott/SPG	Drew Pinto – SVP of Distribution	Corporate/ Agency	Cisco	Susan Lichtenstein – Director of Global Travel
		Andrew Luck – Head of Sales and Distribution		Hilton	Paula Christy - GDS distribution		Rob Fulnecky – Director of Finance	
	Spirit	Ted Christie – CFO	Accor	Rowena Moll	Oracle	Jack Eichorn – SR Director Global Travel		
		Marty St. George – EVP Commercial Planning		La Quinta		Vivek Shaiva - CIO Julie Cary - CMO	BP	Kathleen Silverman – Global Category Director
	JetBlue	Steve Priest - CFO	Omni	Sydney Goodwin - VP Revenue Strategy and Global Distribution	CWT	Vince Chirico – VP Global Technology Partners		
	Qantas	Rainer Bauer – Data Manager		Jaimé Pena - Director of Automated Distribution		Blaine Stanga – NAM Technology Partners		
	Azul	Antonoaldo Neves - President				Dale Eastlund – CWT Online Booking Tools		
	Air Canada	Mark Nasr – Loyalty, eCommerce, Ancillary CRM				Jeff Barrett - VP of Global Distribution		
Lufthansa	Markus Binkert - CCO				Thane Jackson – VP Global Distribution/Channel Strategy			
					David Mitchel – SVP Supplier Relations			
					John Bukowski – Director Global Content			
					American Express	Christophe Tchong – VP Core Products		
					Accenture	Lisa Keller – Global Manager Dan Maschoff – Global Director		
						Melissa Parker – Global Category Manager		
					Other	Hopper	Fred Lalonde - CEO	
					<i>confider</i>	Hipmunk	Adam Goldstein - CEO	
						T2RL	Richard Clarke	

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Appendix

Technology Assessment



Rules Based Offers



Market Fares

Public fares – Fares published and visible out to the full market (e.g. Those available through ATPCO)

Public ancillaries – Ancillary prices published and visible out to the full market (e.g. Those available through ATPCO)

Branded fares – Those branded fares that are published and visible out to the full market (e.g. Those available through ATPCO)



Persona-based Offers

Negotiated offers

- **Negotiated ancillaries** – A pre-determined negotiated price for a la carte ancillaries (e.g. Company negotiated discounted ancillaries)
- **Negotiated bundles** – A pre-determined negotiated price for a bundle of ancillaries and a base fare (e.g. A company-specific branded fare)

Persona-based bundle – A pre-determined bundle of ancillaries and a base fare that is offered based on the traveler's persona (e.g. International business traveler)

Loyalty status-based offers – Pre-determined pricing or bundles based on customer loyalty status

Cross-sell

- **Traditional supplier** – Offers for other supplier content (e.g. A hotel offer on airline.com)
- **Cross-sell** – Cross-sell of complementary products from the same supplier (e.g. Priority boarding)
- **3rd party content** – Offer for third-part content such as tours, meals, trip insurance, etc. (e.g. TSX)

Targeted promotions

- **Rebate** – The inclusion of a special post-travel rebate based on additional segments/packages purchased
- **Flash sale** – The ability to offer a time-based promotional offer consisting of discounted base fares or ancillaries
- **Discount codes** – The ability to offer a "promo code" that would result in discounted base fares or ancillaries

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Intelligent and Dynamic Offers



Real-time Pricing

Real-time RM – Visibility to real-time availability to modify typical RM responses

Dynamic pricing

- **Base fare** – Ability to adjust and adapt base fare prices in real-time based on inputs such as market availability, competitor pricing, travel profile, and trip context
- **Ancillaries** – Ability to adjust and adapt base fare prices in real-time based on inputs such as market availability, competitor pricing, travel profile, and trip context

Bidding

- **Traveler-led** – Ability for the traveler to bid what they would be willing to pay for either a base fare or ancillary
- **Reverse Auction** – The traveler provides trip details and suppliers provide offers back and bid based on where and when the traveler wants to go

Group discount – Offering custom pricing in real-time based on group requests

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Smart Offers

Affinity recommendations – Highlight what similar travelers have purchased that you may be interested in

Competitive offer – Offer high-value or targeted travelers a competitive offer from another supplier in the booking path

Dynamic bundle

- **Ancillaries** – Real-time bundling of ancillary offerings based on traveler information and trip context
- **Supplier Cross-sell** – Proactive offers in real-time at the initial point of booking for other travel supplier types (e.g. I've booked my flight and I receive a targeted hotel offer)
- **3rd party content** – Offers with content from other third parties such as tour packages, restaurants, etc. (e.g. TSX)

Blisure-based offers

- **Companion pass** – Ability to provide a special offer for adding a companion traveler to an existing trip (e.g. Discounted fare for bringing a friend on a business trip)
- **Trip extension offer** – Ability to provide special offers that include other suppliers content in order to offer the ability to extend a trip (e.g. New flight and hotel offer for a trip extension)

Push offers

- **Recurring trip** – "Auto-rebook" and special trip offers generated by pushing offers to travelers that frequently take the same trips
- **Calendar-based shopping** – Proactive delivery of targeted trip recommendations directly in Microsoft Outlook and other calendar tools
- **Disruption retailing** – Proactive offer to ease disruption management or to offload lower paying passengers for higher paying travelers closer-in to departure
- **Post-booking yield management** – Ability to proactively offer an offer for a different flight to displace ticketed travelers and allow for higher yield travelers

Today, airlines and hotels offer a limited number of ancillaries and cross-sell opportunities, many of which are facilitated through the direct channel

Airline ancillaries



Ancillaries

- Upgraded seating
 - Bags
 - Priority boarding
 - Expedited security
 - Wi-Fi
 - Meals
 - Onboard entertainment
 - Travel insurance
- (Branded fares comprise various groupings of base fares and ancillaries)*

Cross-sell opportunities

- Hotel
- Car rentals
- Cruise
- Tour packages
- Credit cards

Hotel ancillaries



Ancillaries

- Early check-in/ late check-out
- Room location
- Wi-Fi
- In-room dining
- On-property restaurant
- Spa
- Golf course

Cross-sell opportunities

- Car rental
- Tickets
- Credit cards
- Airline partnerships (reciprocal benefits)

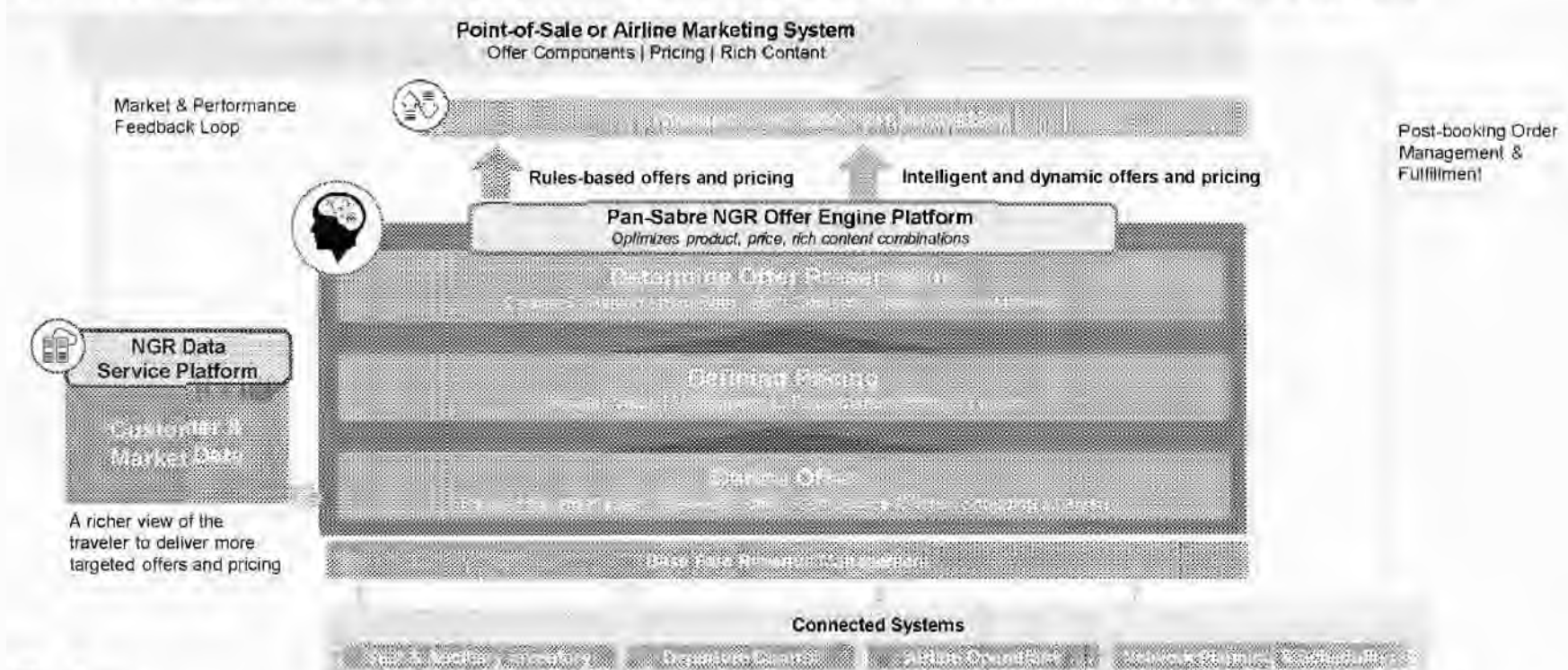


Sources: Ideaworks 2016 Ancillary Revenue report

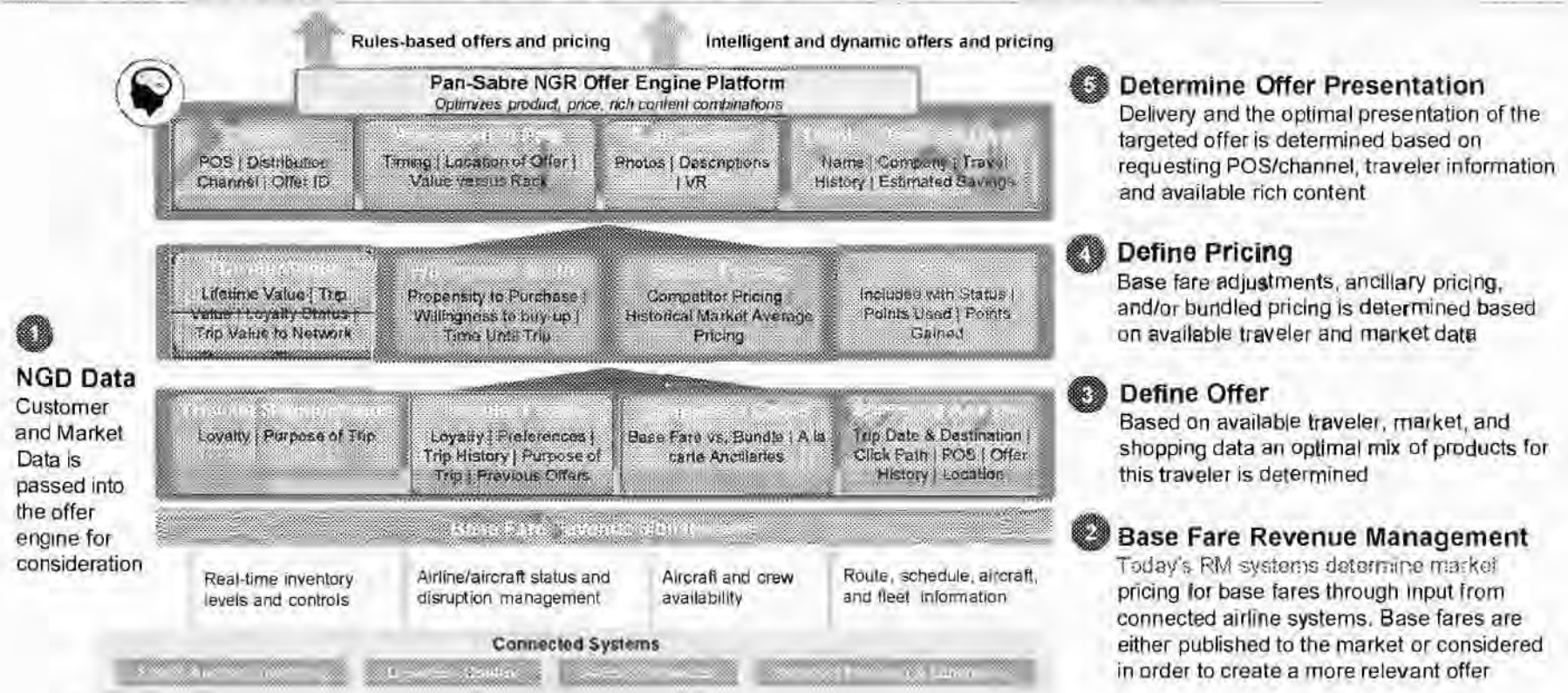
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1 The Offer Engine Platform delivers standard, persona-based or smart offers based on customer insights delivered at the time of the shopping request

Pan-Sabre offer management capabilities to deliver the right offer to the right traveler at the right POS at the right time



1 The Offer Engine Platform connects to airline systems and leverages a feedback loop of data to know if the offer converted to an order

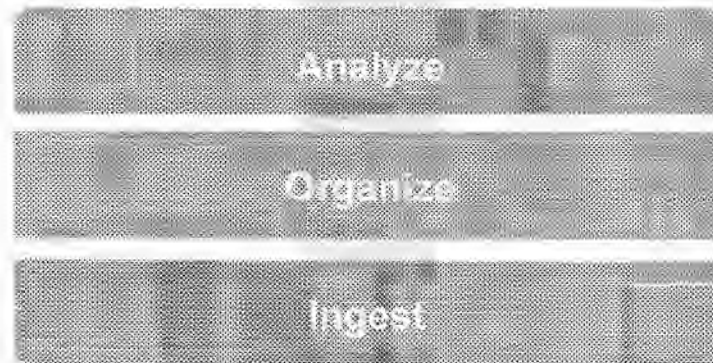


- 2 The Data Service Platform creates a repository of raw data and distilled insights that Sabre and its customers can consume in a variety of ways to propel business
-



Pan-Sabre Data Service Platform

- Passes, stores, analyzes buyer and market data
- Informs planning, enhances targeting and supports "smart" offer creation



Inputs

- Internal data sources
- External data sources

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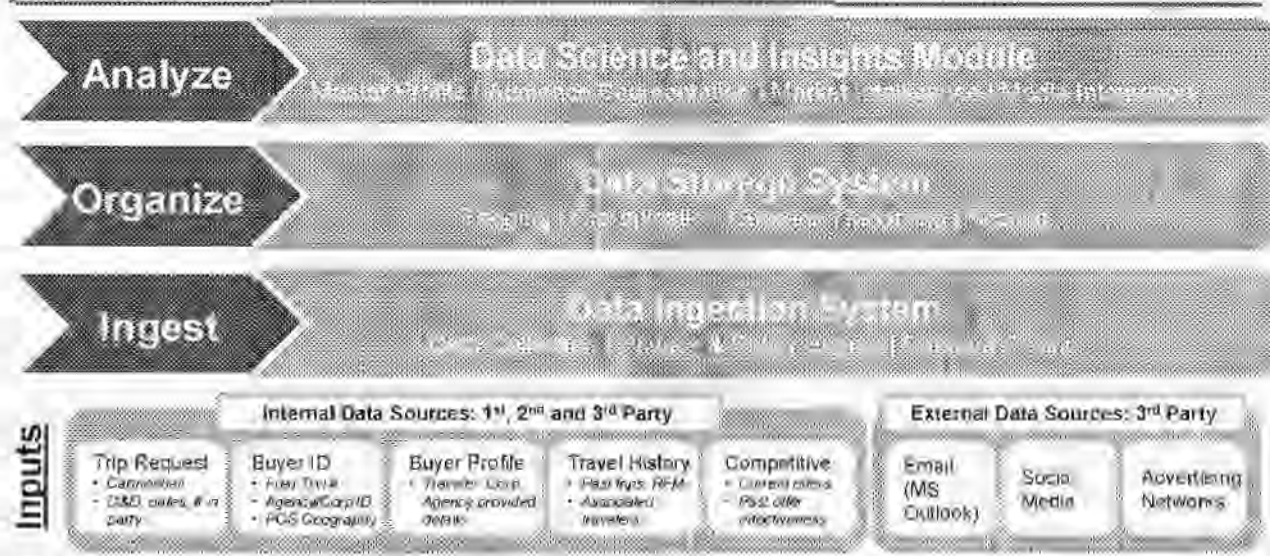
Outputs

- Raw data feed (trip, buyer, market)
- Rule-based insights for basic offers
- Advanced analytics for smart personalized offers
- Offer performance feedback

- 2 The Data Service Platform includes a standard data model for storing and sharing data and makes analyzed segmentation and competitive data available

Pan-Sabre Data Service Platform

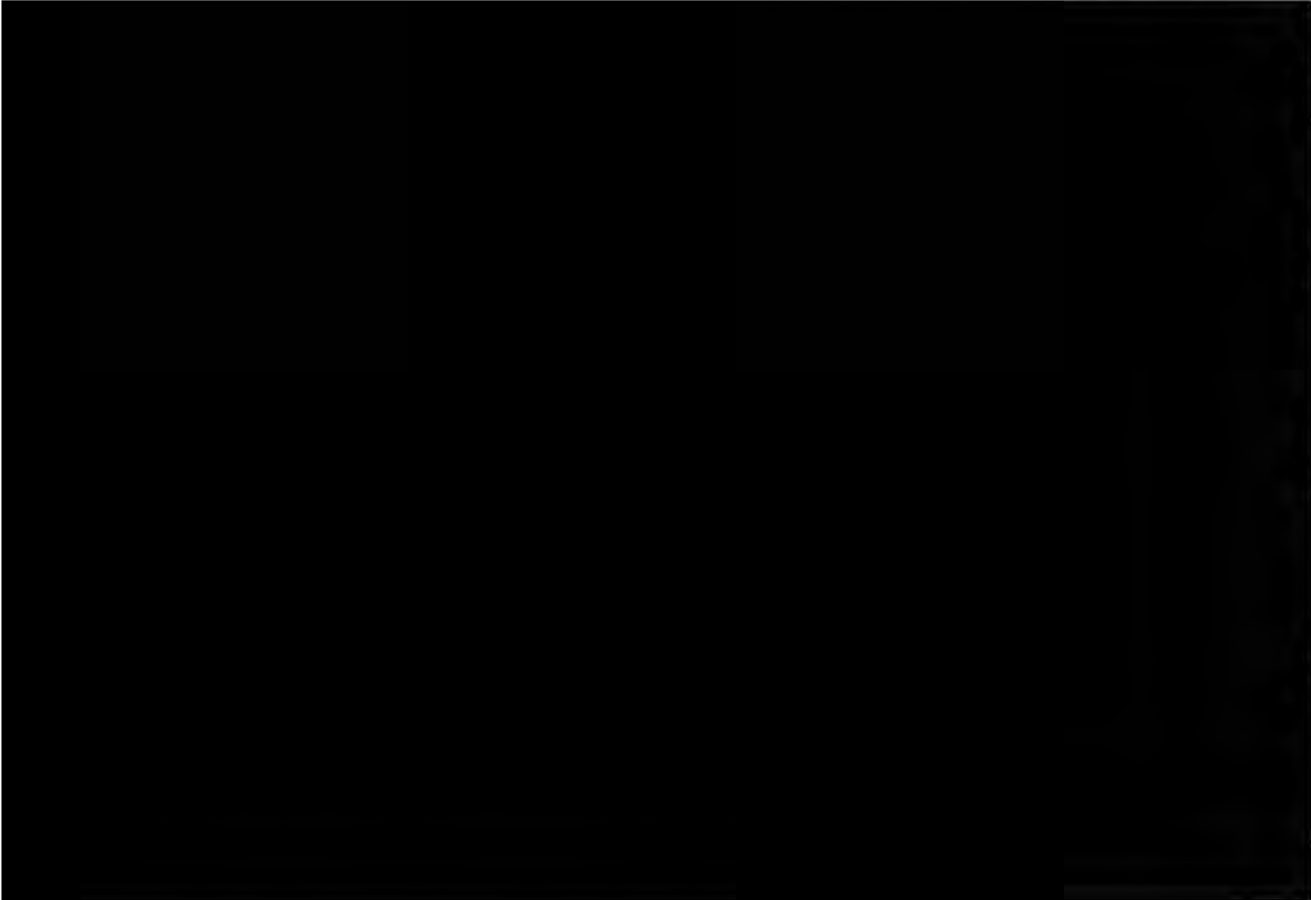
- Passes, stores, analyzes buyer and market data
- Informs planning, enhances targeting and supports "smart" offer creation



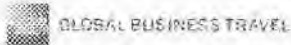
How it works

1. Data ingested from internal and external sources
2. Data tagged for tracking and organized using taxonomies
3. Algorithms applied to identify data relationships
4. "Enhanced" profiles created (traveler, trip and other ambient context)
5. Profiles clustered into segmented audiences to inform targeting activities





External interviews reinforce the value of data with corporations focused on protecting travelers



"I have a hard time seeing a world where we will use less data. The utility of the traveler will win"

-Christophe Tchong, VP, Product, AMEX



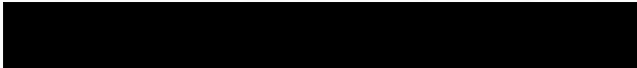
"[We] will be thinking about ways to extract data from our own data sources to help with dynamic pricing/bundling"

-Ted Christie, Spirit, CFO

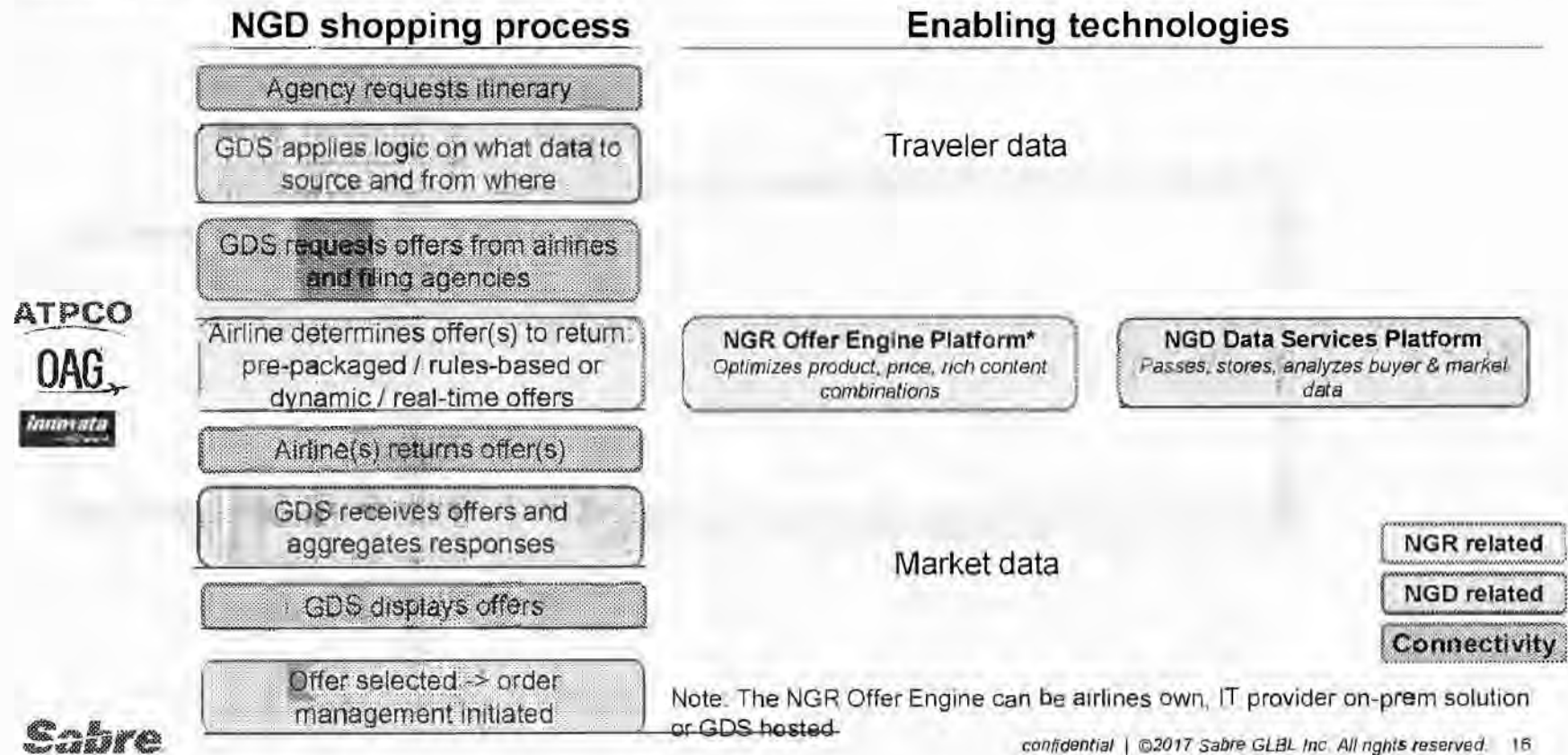


"When you're talking about corporates, we have high ownership of customer data"

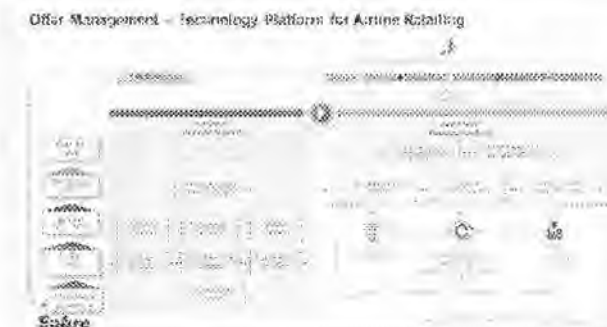
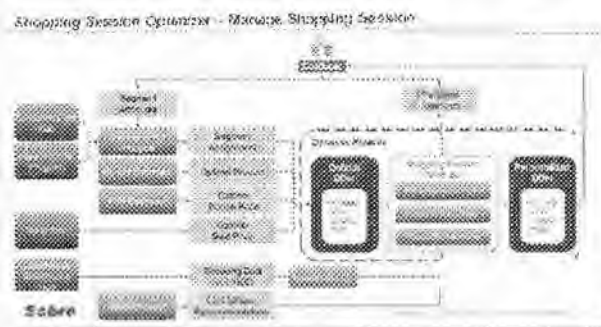
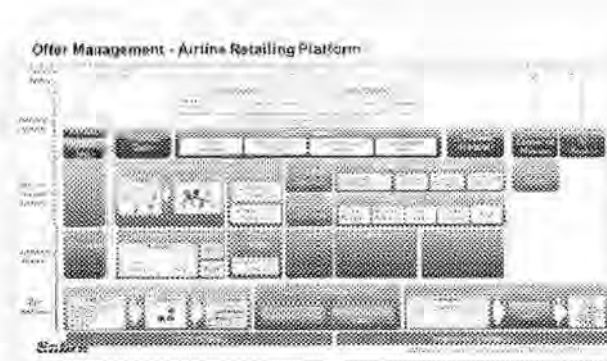
-Dan Maschoff, Director, Travel, Accenture



NGD design and planning has been accelerated with a process flow that incorporates NGR solutions



The existing unfunded proposal for an Offer Management - Airline Retailing Platform supports the NGR vision and can be leveraged

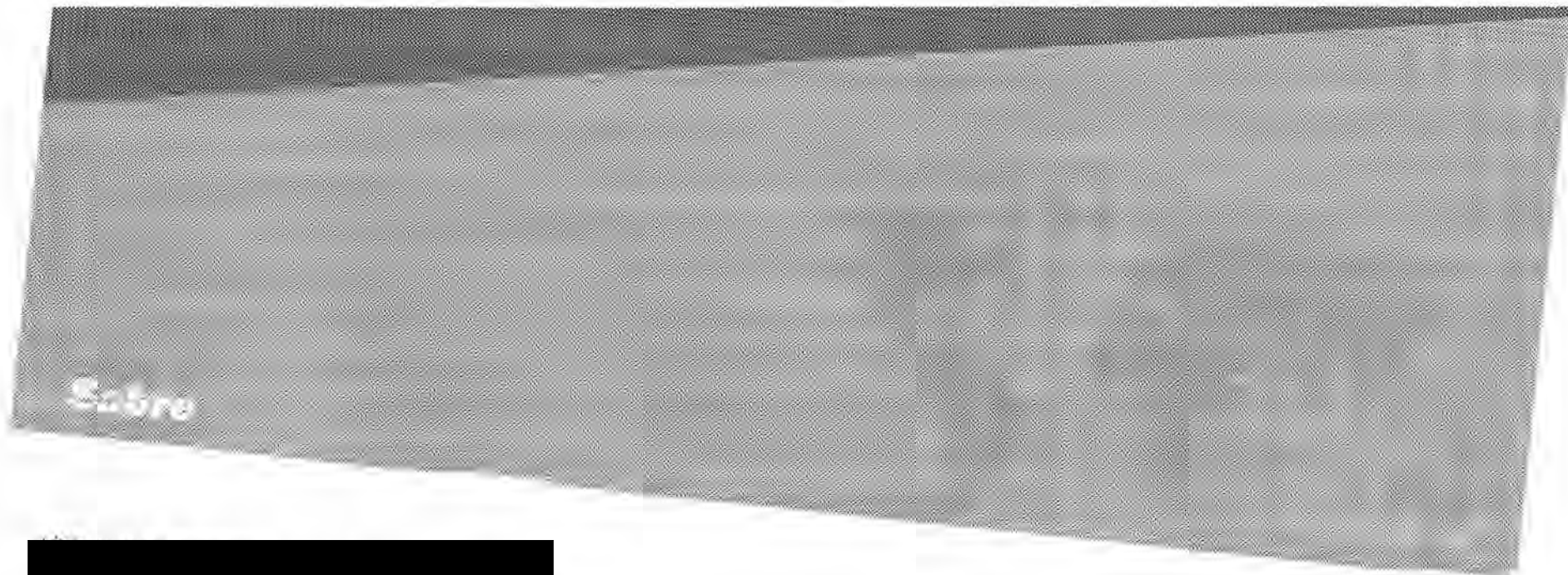


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Appendix

Commercial Assessment



SABRE



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Sabre can be a technology partner for suppliers and agencies looking for different levels of participation in retailing opportunities

Sabre Data Service Platform Examples: Sabre, Airlines, Travel, R&M



Services/APIs

- Services to assist in-house custom development
- e.g. airline utilizes Sabre services to develop R&M capabilities


Example customers
 [Redacted]
 Top 5 airlines

Existing product capabilities

- Pass frequent flier # to airline ([Redacted] seat pricing)

Distribution impacts
 All channels

Sabre Data Engine Platform Examples: Sabre, Airlines, Travel, R&M



Supplier product

- Provide off-the-shelf product functionality for the direct channel: bundle creation, dynamic pricing, connectivity

Example customers
 [Redacted]
 Top 6 - 50 airlines

Existing product capabilities

- Dynamic pricing
- Flight promotions

Distribution impacts
 All channels



Indirect distribution product

- Provide hosted next gen retailing capabilities through the Sabre GDS platform

Example customers
 [Redacted]
 Top 50+ airlines

Existing product capabilities

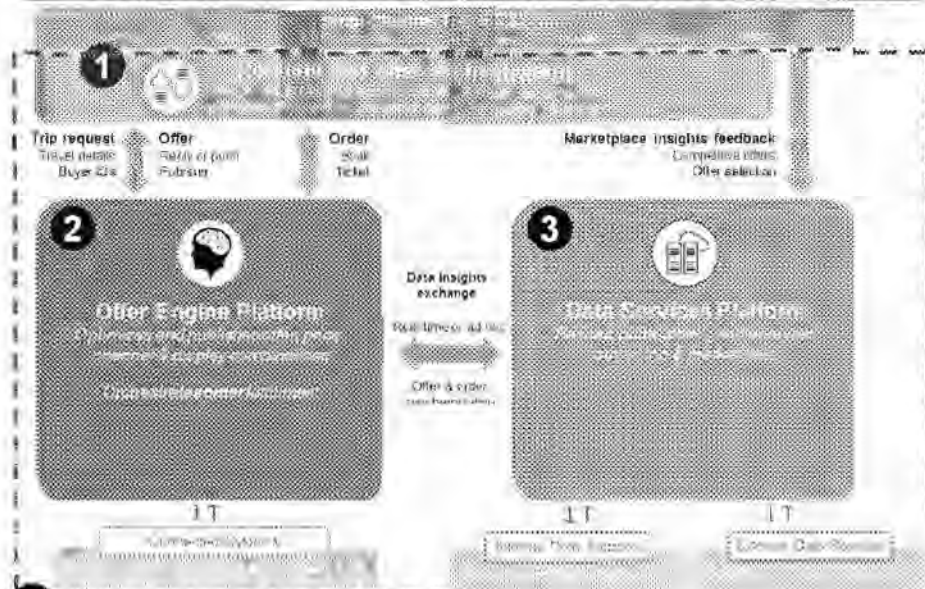
- Rich content in SRW

Distribution impacts
 Sabre GDS only



Next gen retailing platform provides Sabre an opportunity to use our technology, data and network to create a data-driven retailing tool

When considering commercial models, components could be bundled or sold separately



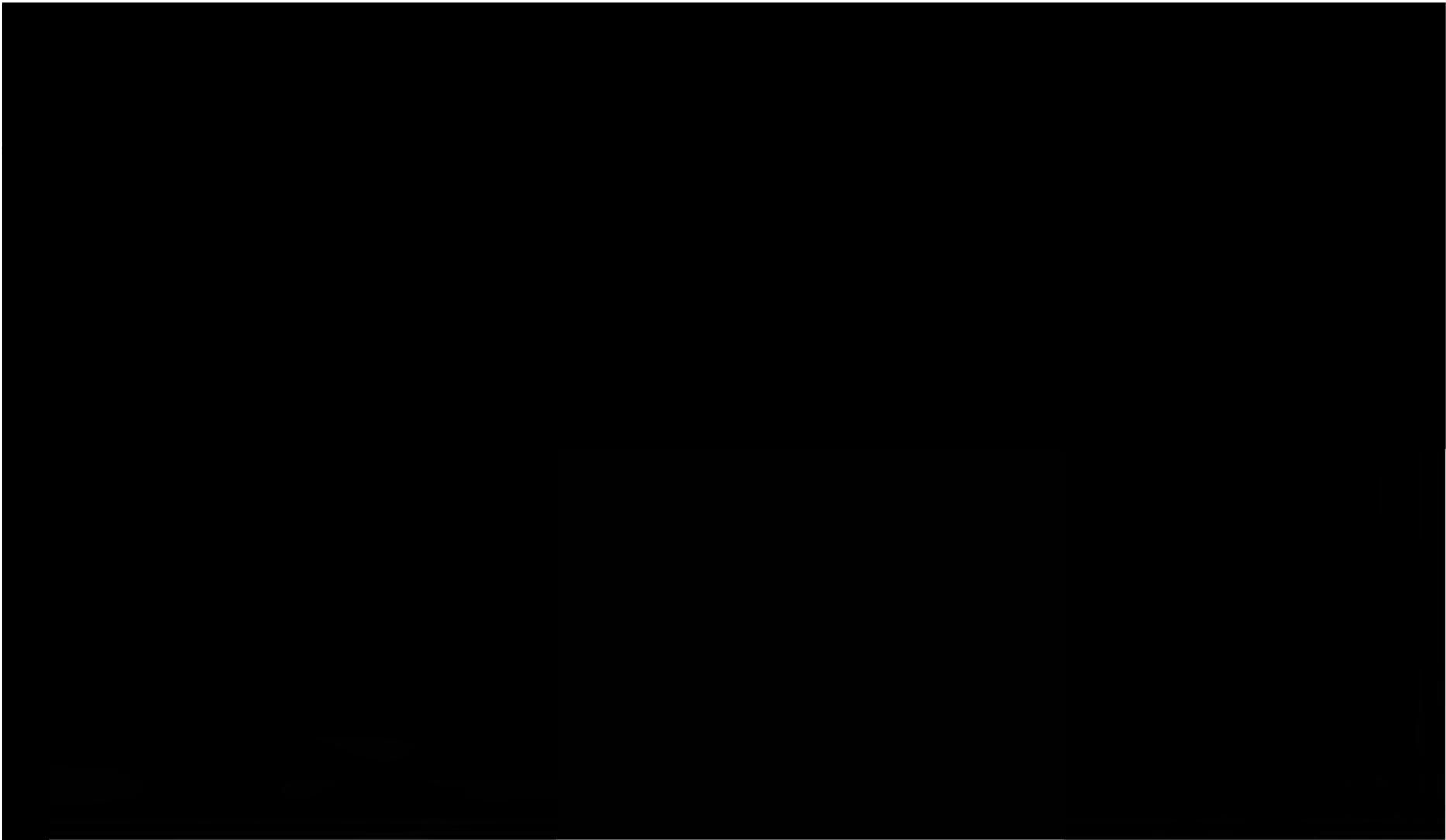
4 Next gen retailing / distribution platform (Connectivity + Offer engine + Data services)

Sabre Note: Data services currently sold – TN = MIDT, TCN, Sabre media, AS = GDD
Source: TN / AS SME interviews

Each component's value proposition lends itself to a different commercial model

Component	Value to supplier	Similar value prop today?
1 Connectivity	Buyer network	TN (GDS)
2 Offer engine	Offer creation	AS / SHS (PSS, CRS)
3 Data services platform	Decision support	AS / TN (GDD, MIDT, etc.)
4 Next gen retailing / distribution platform	Optimized, multi-channel marketing solution	N/A

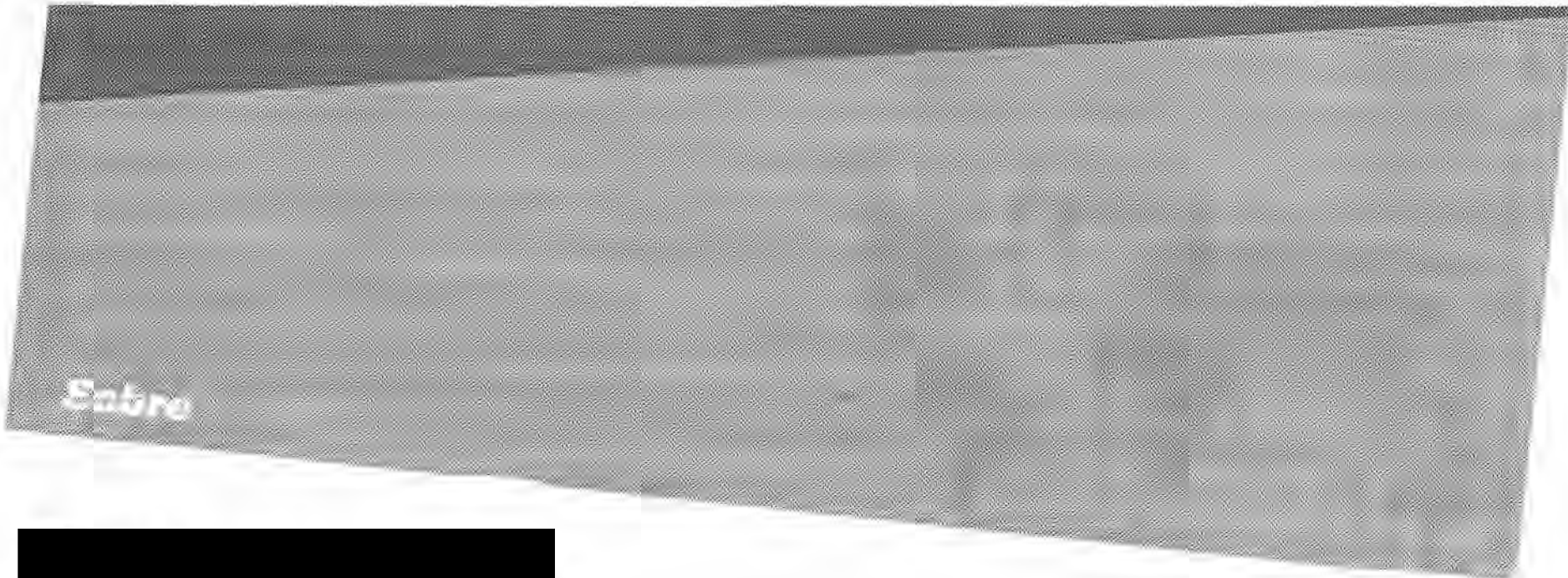
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Appendix

Competitive Assessments



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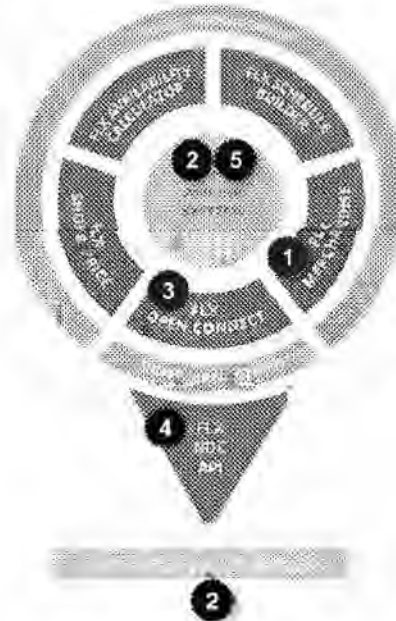


Farelogix provides a primarily rules-based offer engine and NDC connectivity to a few significant airlines, but relies on airline systems and aggregators/GDSs for data

Sabre proposed NGR and NGD



The Farelogix Airline Commerce Gateway relies on external sources for data; capabilities are primarily rules-based



Farelogix's customer list includes well-known airlines but has not grown recently



Farelogix is providing NGR/NGD capabilities for a few significant carriers; they have four major products providing these solutions

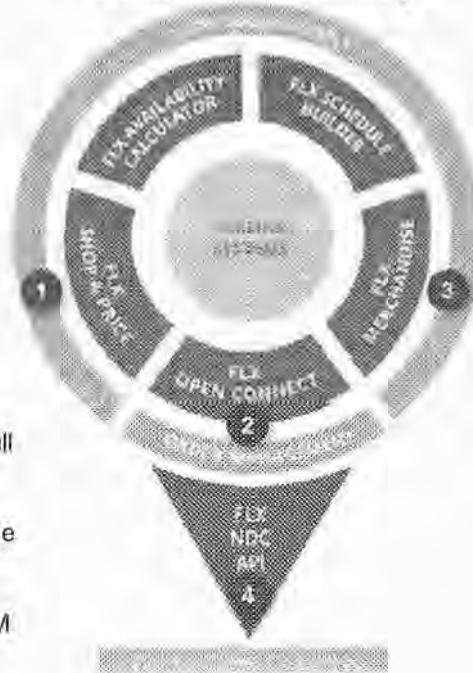
1 **FLX Shop & Price**

- Shopping, offer, and pricing engine designed for high volume, personalized NDC-aligned offers
- Prices offers based on airline-defined rules, FF and CRM data, and AI/Predictive analytics
 - AI/Predictive analytics provided by Triometric

2 **FLX Open Connect**

- PSS-agnostic direct connect connectivity with full orchestration for offer and order management, ticketing, ARC/BSP and more
- Farelogix is already connected to and compatible with the following PSS/Airline Host systems: Amadeus Altea, Sabre Multi-Host, Worldspan, Galileo Airline Host, HP Shares, HP Atraxis, IBM RES III, Mercator/Mars, and Navitaire.

The Farelogix Airline Commerce Gateway



3 **FLX Merchandise**

- Airline-controlled merchandising and rules engine with unlimited flexibility for custom-tailored offers
- Current customers: United Airlines, Flydubai, Qatar Airlines, and Hawaiian Air

4 **FLX NDC API**

- Robust delivery of an airline's full suite of content to any/all sales channels
- FLX API that pushes/receives offers and orders
- Current customers: Lufthansa, Delta, Emirates, and Ethiopian



Farelogix products are competitive to Sabre's AS solutions but leave opportunity for us to leapfrog them

Farelogix System



Farelogix Product	Sabre View	Equivalent Sabre Solution
FLX NDC API	FLX can connect to any platform, direct connect, or GDS via standardization through XML; Sabre solution is a cache based solution that allows you to store offers	Offer Management Store (in production)
FLX Open Connection	FLX has the ability to connect to any PSS system; Sabre is limited to CSS, the offer is stateless and the offer doesn't have to be real time	Offer Management Store (in production)
FLX Merchandise	1 FLX can provide more offers and flexibility than Sabre, but is still rules based and not truly dynamic; Sabre can only connect to the direct channel and hosted airlines, but has enabled a FLX connection	SabreSonic Merchandising (Dynamic Retailer & Flight Promotions)
FLX Shop & Price	2 Sabre has better core shopping – tech advantage; FLX partnered with 3 rd party adding more flexibility, but currently building their own	Advanced Shopping

Sabre System



Known airlines connecting to Farelogix



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FLX merchandising solution creates bundles, pushes new offers, and provides ancillary upsell opportunities

Recovery Offer Solution



- Pushes alternative offers when a disruption occurs
- United currently uses this solution today

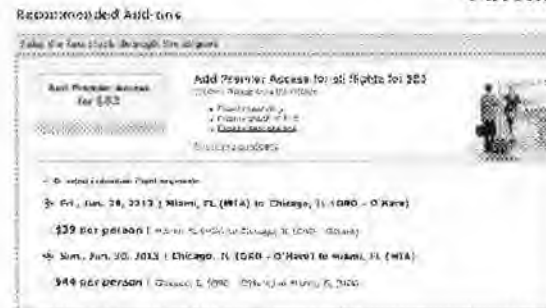


Corporate Bundles Solution



- Corporate bundles can add services or discounts to the price based on airline rules

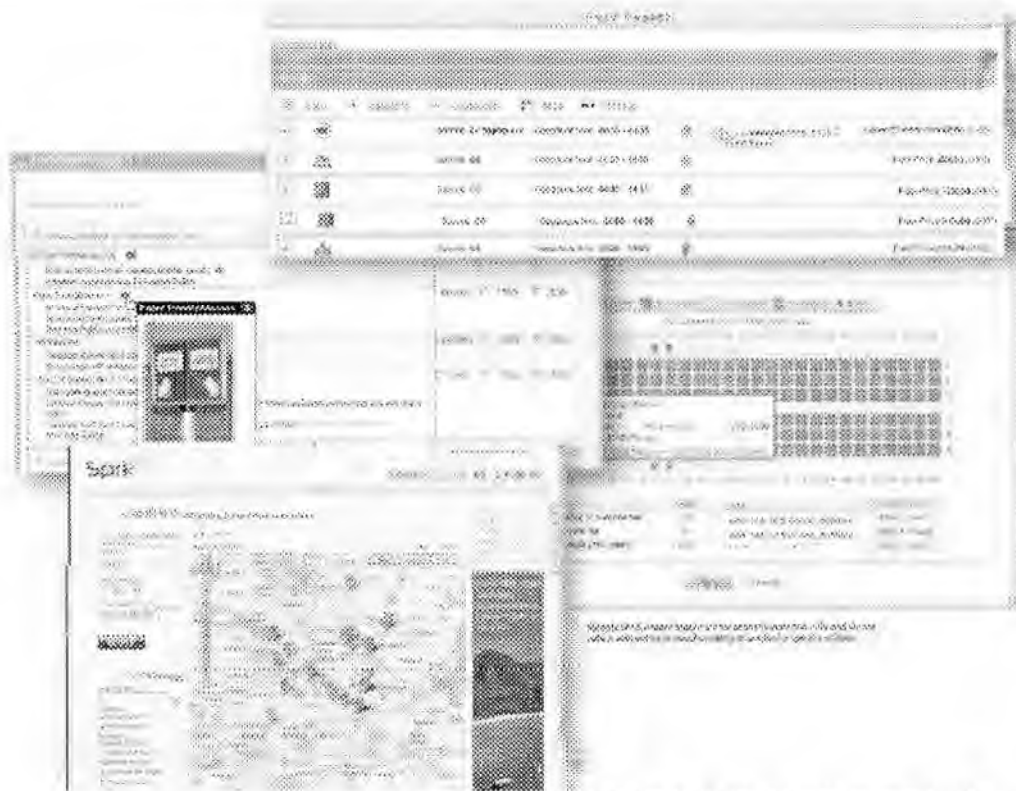
Ancillaries Solution



- Provides the ability to easily upsell and add ancillaries to a flight

SPRK is a travel selling platform offered by Farelogix

- Travel agents using SPRK have access to expanded content sources, including direct connects and merchandising
- Usage limited to agencies that have direct connects with airlines
 - Most commonly for Lufthansa



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Appears Farelogix has expanded existing relationships, but no significant new customers in the past few years

Airline	Activity	PSS Provider	New FLGX Customer	Date / Source
WestJet	In production with dynamic pricing engine for ATPCO-based fares and non-ATPCO fares managed directly on airline website	Sabre	X	4/5/17 – Farelogix News Release
Lufthansa	Extend tech contract for direct connect and travel agency desktop	Amadeus	X	3/9/17 – Farelogix News Release
Air Canada	Integrating with Routehappy to deliver content from Routehappy with dynamic pricing and rules-driven offers from FLGX in a single API	In House	X	10/27/16 – Farelogix News Release
Virgin America	Integrating with SeatBoost from real-time bidding for flight upgrades	Sabre	X	7/21/16 – Mobile Commerce Daily
Qatar	Completed first stage of NDC pilot will significantly increase the volume of products available for sale by travel agents who use the FLGX	Amadeus	X	3/7/16 – Farelogix News Release
American	Announced capability to sell upgraded seats on Sabre using AA Direct Connect API, which FLGX provides	Sabre	X	2/4/16 – Tnooz
Flydubai	Completed integration with flydubai.com with FLGX merchandising platform	In House	✓	8/4/15 – Farelogix News Release

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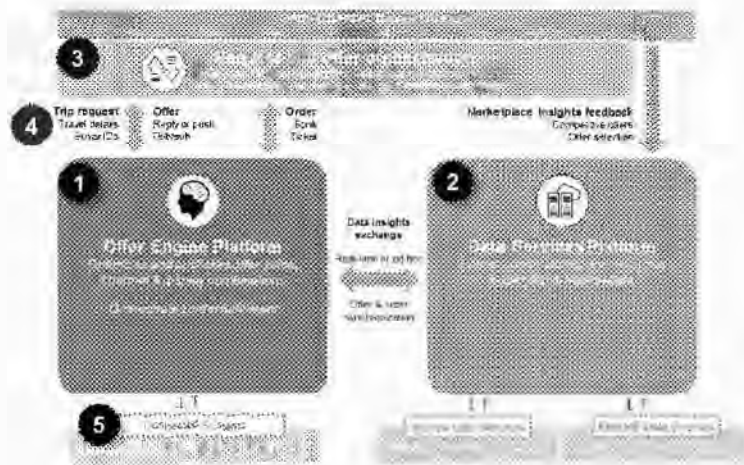
Farelogix other customers use a limited number of products that they offer

Airline	Products Used	PSS Provider	Customer Since	Latest Announcement
Delta	Signed agreement for Farelogix to provide direct access to Delta's content	In House	2011	4/26/11 – Travel Industry Blog
United	Amadeus using United's Farelogix powered XML API to sell Economy Plus seats	HP	2010	9/3/14 - Trooz
Emirates	Established a direct connection between Emirates PMS and Farelogix	In House	2006	7/25/06 – Eye for Travel
Hawaiian	XML Direct Connect API and FLX Merchandise	Sabre	Unknown	Unknown
Ethiopian	XML Direct Connect	Sabre	Unknown	Unknown

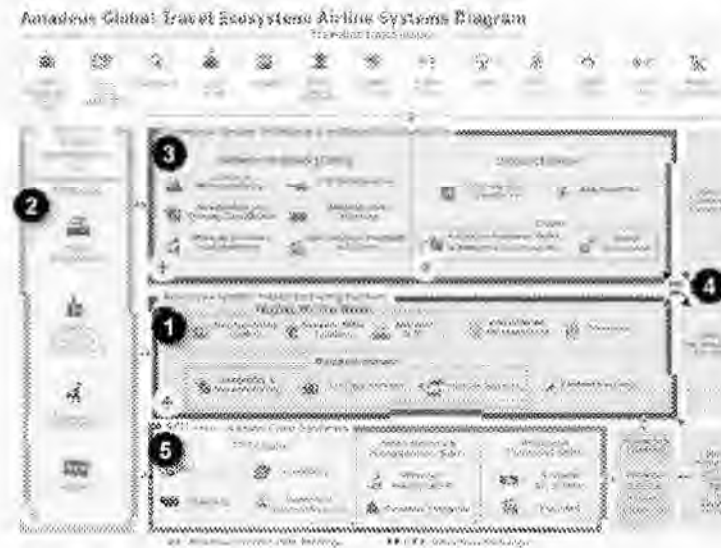


Amadeus has communicated a clear vision which looks nearly identical to where our work has led; their Travel Intelligence module may not be as extensive as our Data Services Platform

Sabre proposed NGR/NGD



Amadeus published vision



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Amadeus articulates a vision that aggressively pushes NGD / NGR solutions, but not all are available today in the market

Amadeus Product	Vision	Available Today
 Anytime Merchandising	Allows implementation & monitoring of airline merchandising strategy	Merchandising Control Dynamic Offer Creation Analytics & BI
 Personalised Merchandising	Personalizes the travel experience, taking into account previous customer behavior, preferences, and segmentation	Customer Experience Management Corporate Programs Loyalty
 Shopping	Offers multi-channel shopping solutions in direct and indirect channels	Flex Pricer Affinity Shopping Ticket Changer Awards Shopping
 Dynamic Content	Availability and Dynamic Pricing Ancillary Services with cash or miles payment Connectivity with other content providers	O&D Control with Dynamic Availability Interline and Codeshare Cross Sell Content

Amadeus is level three NDC certified – the highest level of certification, whereas Sabre is only level one certified

Amadeus Product	Key Product Features/Capabilities	Equivalent Sabre Product	Sabre View
Amadeus Airline Ancillary Services	With a large selection of la carte services integrated, travel agents can drive customer satisfaction and revenues by creating a tailored air travel experience for their customers	Sabre Ancillary Services	
Amadeus Dynamic Availability	Amadeus Dynamic Availability sends real-time flight availability responses based on specific origin and destination, point of sale, frequent flier and journey data	Sabre Dynamic Availability	
Amadeus Airline Fare Families	Fare families allow travel agents to help their customers navigate complex travel choices, by identifying and recommending the best fare to each customer, all based on their individual needs	Sabre Branded Fares	
Amadeus Anytime Merchandising	Amadeus Anytime Merchandising is a user-friendly and intuitive solution that allows the airline marketer to effectively define, deploy, monitor and adjust the airline merchandising strategy in real-time	SabreSonic Merchandising	
Bidding for Upgrades – Premium Cabin/Economy	With Plusgrade, airlines can capitalize on empty seats and increased upgrades, generating significant revenue. Through live bidding, passengers are empowered by being able to make an offer for a premium service at a price they are comfortable with – depending on availability.	N/A	



There are very few competitive NDC GDS products available today

Amadeus Product	Travelport Product	Sabre Product	Key Product Features/Capabilities	Sabre View
Amadeus Dynamic Pricing	N/A	Sabre Dynamic Pricing	Based on real-time shopping session information (e.g. trip context), market information (e.g. competitor offers), and the airline's revenue management and pricing strategy (e.g. product consistency), Dynamic Pricing is modelling customer behavior and decision, considering his willingness to pay, calculates the optimum price and instantly adjusts the available fares and taxes.	
Amadeus Ancillary Services	Travelport Ancillaries Services	Sabre Ancillary Services	Ability to sell ancillaries and branded fares via the indirect channel	

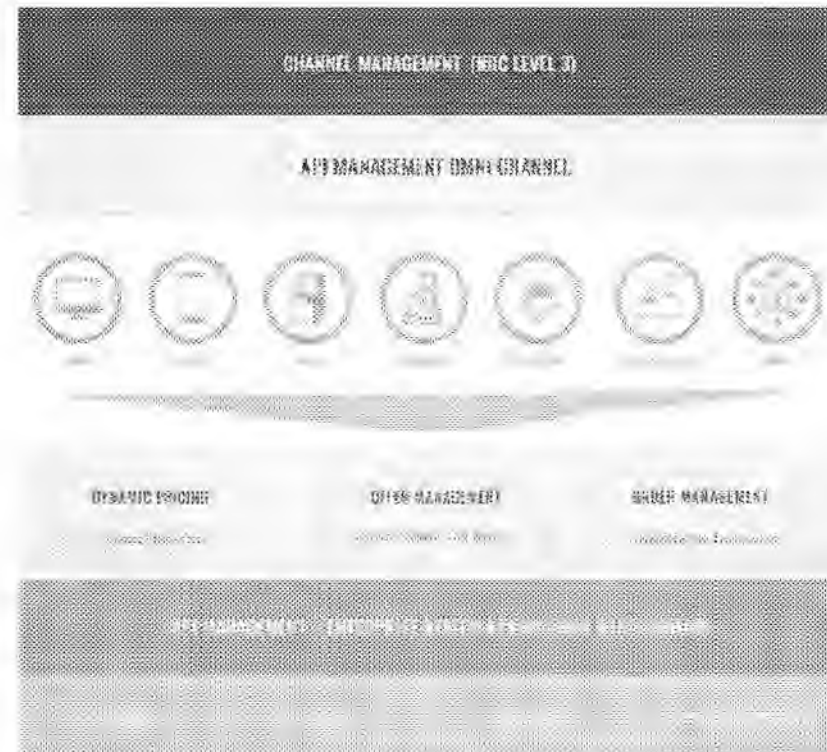




Datalex

Digital commerce for travel retail

- Digital Commerce Platform combines pricing, offer and order management with customer insights to deliver a competitive and differentiated airline retail experience on every device
- **Offer & Pricing Management** – Promote, bundle and tailor products across all channels; together with the Product Management component, dynamically configure pricing and availability
- **Order Management** – Supports “agile omni-channel shopping,” fulfillment and trip management services – maintaining a single view of the customer
- **Omni-Channel** – A suite of B2C and B2B applications or APIs to support all point-of-sale operations across desktop, mobile, kiosk, and call center.
- Cite ~15 airlines as customers, IATA NDC Level 3 certified – Brussels, JetBlue, Air China, Philippine, Swiss, Air Transat, Aer Lingus, West Air, Virgin Australia, Air Malta, Copa, HNX, Edelweiss, Urumqi Air, Lufthansa Group



While an established company, Datalex is making new inroads with carriers by leveraging the momentum with IATA NDC

Datalex

Company Profile

- Founded – 1985
- Employees – ~250
- Headquarters – Dublin, Ireland
- Ownership – (ISE: DLE), \$4.21
- Market Cap – \$350M
- Annual Revenue – \$55M
- EBITDA – \$6.7M EBITDA

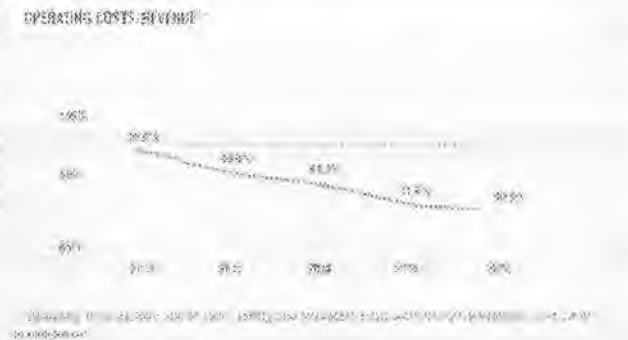
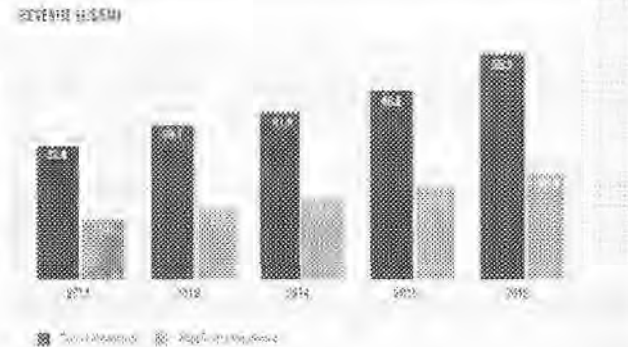
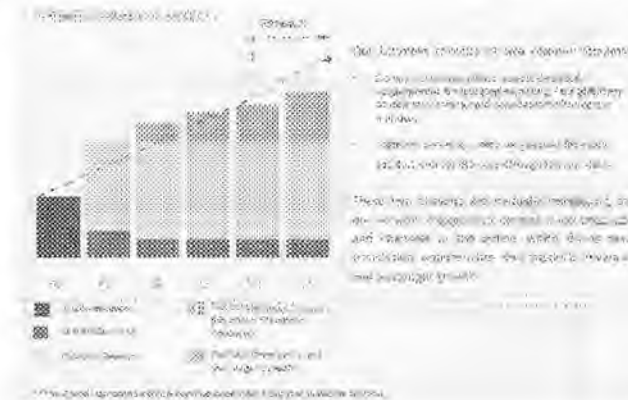
Product Portfolio

At the core of the product portfolio is the retailing platform, with offer and order management being the primary components

- Offer & Pricing Management
 - Product Catalog
 - Air Pricing
 - Promotions
 - Merchandising
 - Loyalty
 - Search Server
 - Persona
- Order Management
 - Omni-channel Trip Management
 - Payments
 - Call Center

“Our partnership with Datalex has been a significant contributor to RASM improvement and market expansion”

-JetBlue Investor Day, December 2016
jetBlue

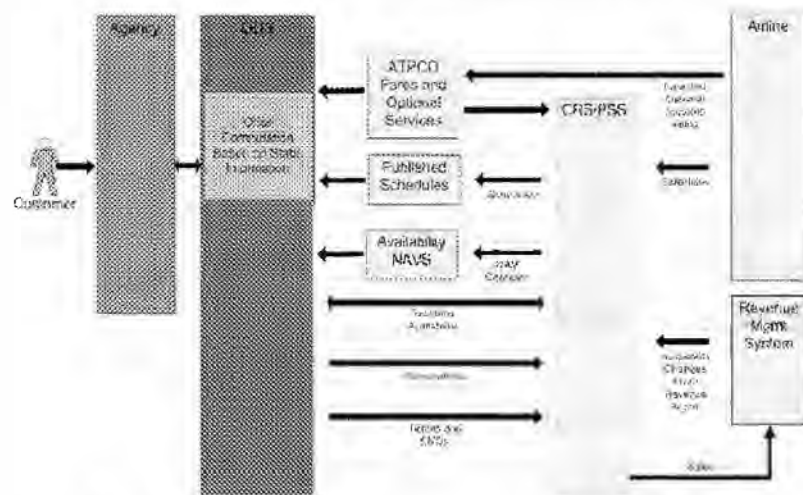


Datalex views post-NDC offer and order management as a wholesale change in how systems determine and distribute pricing and offers

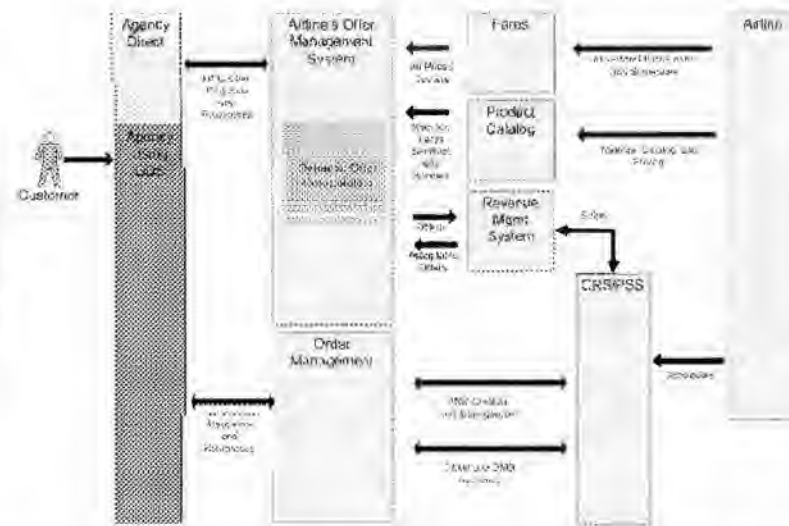
Datalex

Views a post-NDC world where separate offer and order management systems are the systems of record, with GDSs playing more of a connectivity role to only a portion of the agency community.

Offer Management Landscape Before NDC



Offer Management With NDC



New and traditional competitors are certified NDC tech providers; Farelogix and Amadeus are the most relevant threats

Provider	Est Revenue	Latest Market Intel
Amadeus	N/A	Amadeus is not an NDC certified aggregator, but are continuing to work on NDC implementations in other areas. Going live with NDC implementation at Finnair this year, having already implemented Avianca
Datalex	\$55M	Considered one of the most mature and advanced products available. Announced collaboration with IBM and rumored to have large deal with Lufthansa
DCSplus	N/A	Have announced NDC API integrations into agency desktop product. Only NDC connection with Emirates
Farelogix	\$25M	Offer suite of NDC products around offer creation, creating a nearly complete offer management system
HPE	N/A	Only product "NDC Adapter" integrates multiple partners with various NDC standards. Not many use cases yet but could be useful with broader NDC adoption
Hitit	N/A	Crane PSS solution certified as Level 3 NDC capable with both offer and order management functionality
IBS	\$95M	Going live with NDC compliant PSS with Sun Express later this year. Have imbedded NDC messaging standards into core framework of PSS
Indra	N/A	Have "NDC module" within IBE for Iberia Express
JR Technologies	N/A	Have announced release of NDC capable "Airline Retailing Platform," not yet live
Maureva	N/A	Have upgraded NDC certification from Level 2 to Level 3
OpenJaw	\$20M	Level 3 certified, no implementations with customers
SITA	\$180M	PSS is Level 3 NDC certified. Also Level three certified for NDC message hub product – no known implementations
Travelport	N/A	Level 1 certified as an IT vendor, but no known implementations
TP Connects	N/A	Offer merchandising, content management, and NDC API connectivity products. Have implementations at RotanaJet and Saudi Arabian Airlines
Vayant	\$10M	Offer Level two certified offer management solutions, one adopted by British Airways

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ATA NDC Certified Airline

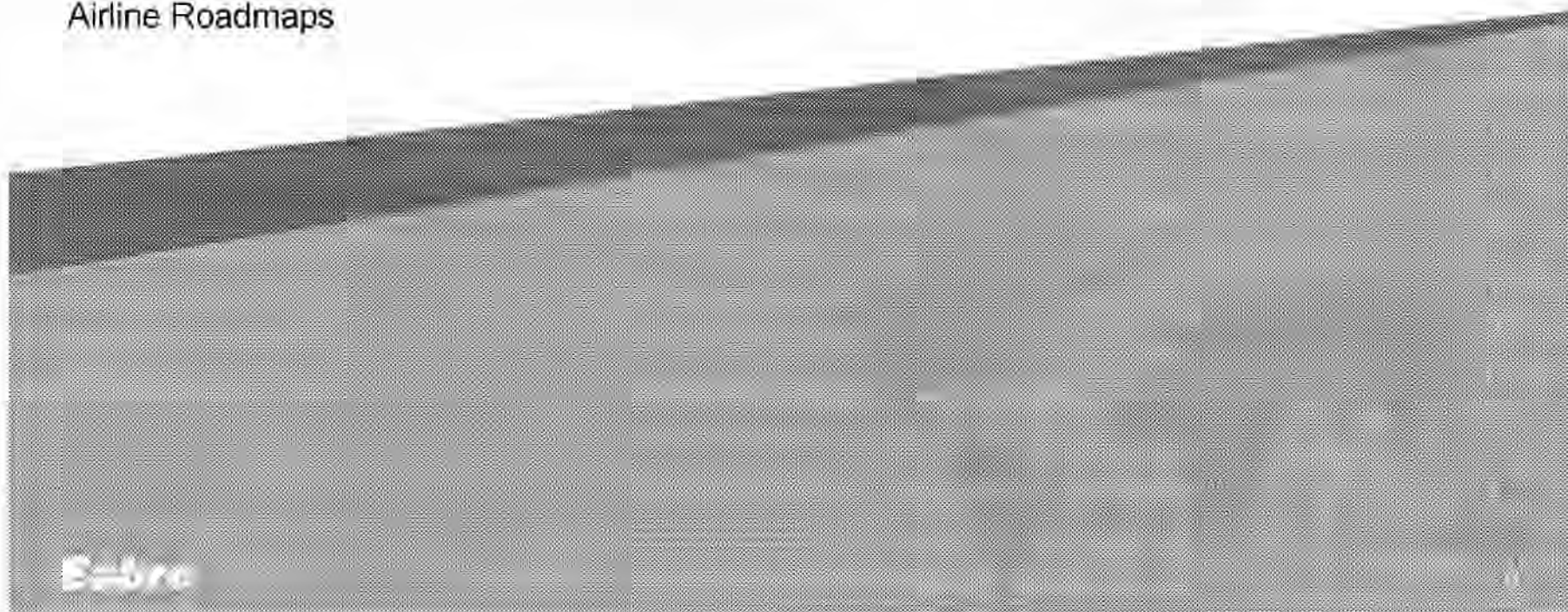
Key It Providers

Airline	CertOrRegType	Level	IT Provider	Aggregators	IT Partner
Iberia L.A.E.S.A. Operadora S. Sociedad Unipersonal	NDC Certified	3 - Offer & Order Management	AMENTA	TRAVELFUSION	
Aer Dijas	NDC Certified	1 - Real Booking Ancillary	CLUB TRAVEL		
Emirates Global	NDC Certified	3 - Offer & Order Management	TRIP.COM	TRAVELPORT50/SCANNER	
Condor Flugdienst GmbH	NDC Certified	3 - Offer & Order Management	CONDOR		
American Airlines	NDC Certified	2 - Offer Management	AMERICAN		
Emirates Global	NDC Certified	2 - Offer Management	EMIRATES		
Caribbean	NDC Certified	2 - Offer Management	TRIP.COM		
Catal Airlines	NDC Certified	2 - Offer Management	TRIP.COM		
United Airlines	NDC Certified	2 - Offer Management	UNITED		
Terra Express	NDC Certified	3 - Offer & Order Management	INDRA SISTEMAS	TRAVELSAFE	
Indigo	NDC Certified	3 - Offer & Order Management	IB TECHNOLOGIES		SEA
Columbus Airline Intelligence	NDC Certified	3 - Offer & Order Management	NAVITRAE	RESERVE	REX TOUR
37 Airline	NDC Certified	3 - Offer & Order Management	ONTRAVEL SOLUTIONS/OMBYD		SEA
Reddair	NDC Certified	3 - Offer & Order Management	TP CONNECTS		TP CONNECTS
Natana InLadation	NDC Certified	3 - Offer & Order Management	TP CONNECTS	TP CONNECTS	REX
All India Airlines	NDC Certified	3 - Offer & Order Management	EXPRESS		REX TOUR
China Eastern Airlines Corporation Limited	NDC Certified	3 - Offer & Order Management	TRIP.COM		CHINA AIRSVC
China Southern Airlines	NDC Certified	3 - Offer & Order Management	TRIP.COM		CRIP
EastJet	NDC Certified	3 - Offer & Order Management	TRIP.COM		
Hong Kong Airlines Limited	NDC Certified	3 - Offer & Order Management	TRIP.COM		
Shandong Airlines Co., Ltd.	NDC Certified	3 - Offer & Order Management	TRIP.COM		
Shenzhen Airlines	NDC Certified	3 - Offer & Order Management	TRIP.COM		REX TOUR
Qatar Airways	NDC Certified	3 - Offer & Order Management	TRIP.COM		REX TOUR
Qatar	NDC Certified	3 - Offer & Order Management		TRAVELFUSION	HPE



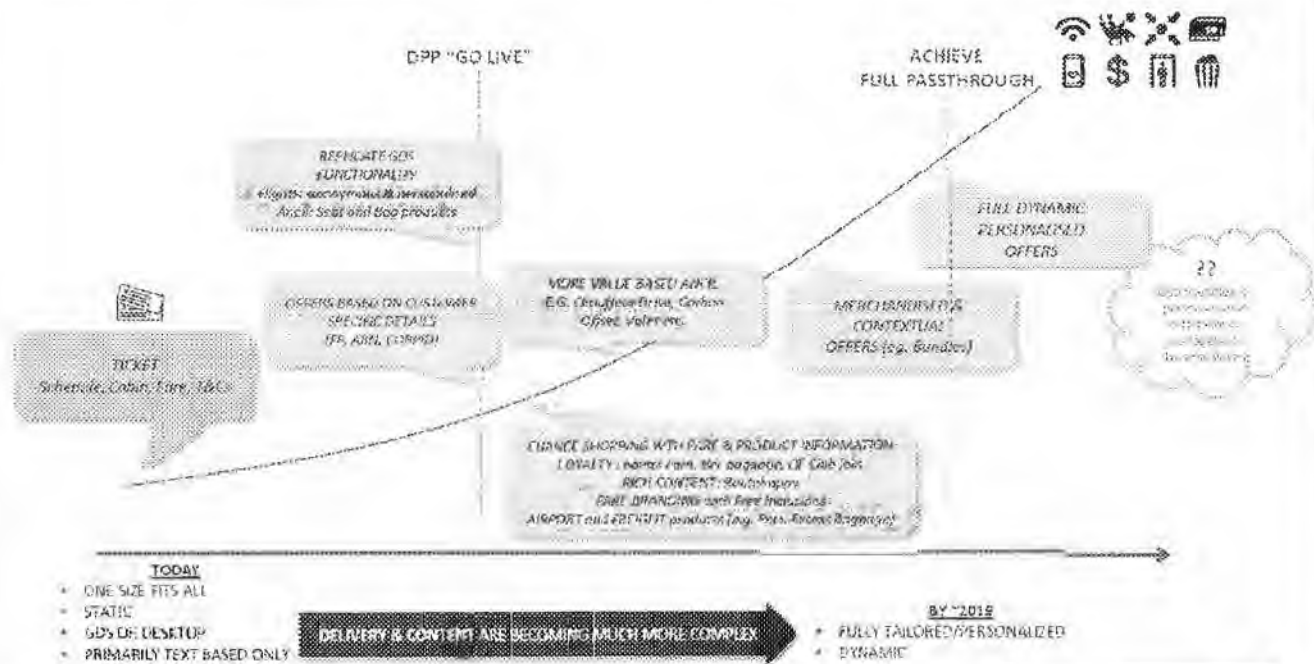
Appendix

Airline Roadmaps



DPP Use Cases – Go Live and Future Phases

SUBJECT TO CHANGE



New and Improved Content via NDC API

1. A means for your subscribers to sell more

- NDC enables us to sell things that we are not selling today
 - Ancillaries: Preferred Seat Selection (PSS), Prepaid Excess Baggage (XBAG), Time-to-Think, WiFI etc.
 - NEW Fare-type products e.g. FLASH Sale (50% off fares during Black Friday Sale between 7pm to 8pm)
 - Bundling and Dynamic Pricing
- Ability to sell [REDACTED] full range of products and services
 - Today, [REDACTED] are technically unable to sell their full range of products and services if not served by API

2. A means for your subscribers to sell better

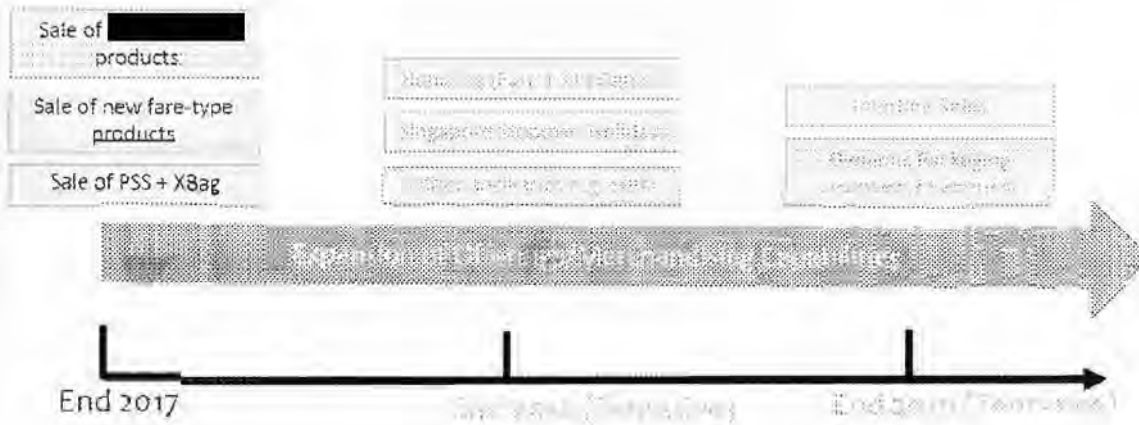
- Some degree of personalisation
 - NDC allows us to know who made the request immediately before responding with an offer
- More accurate inventory and content
 - Leading to fewer or no ADMs and ultimately better customer service by your agents

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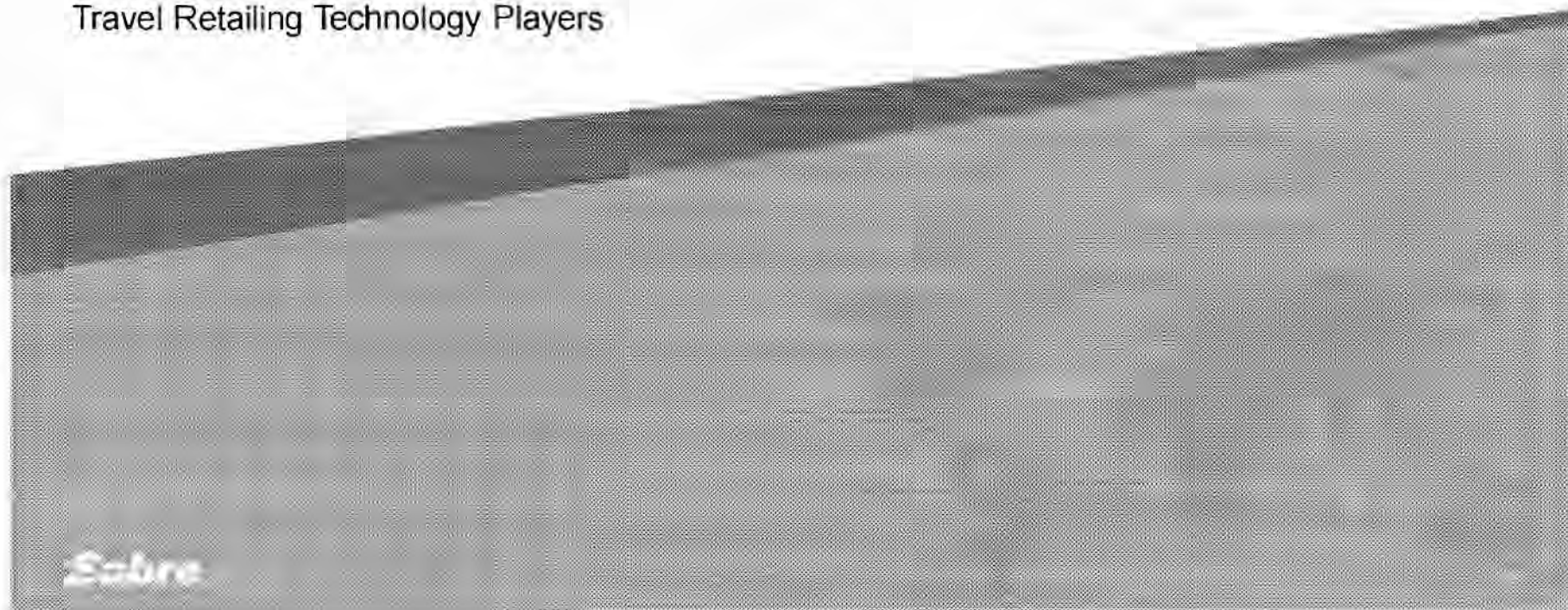
New and Improved Content – Our Plans



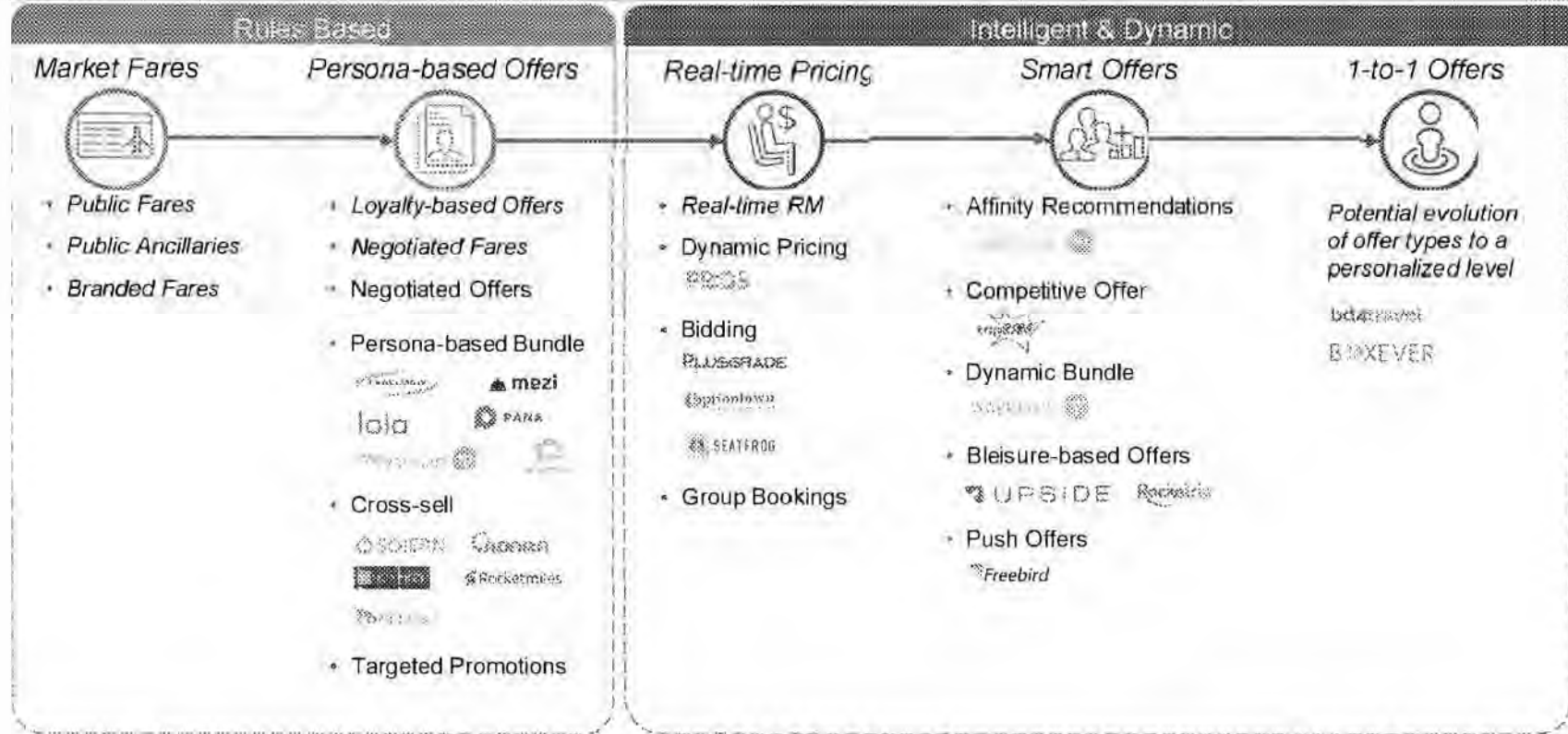
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Appendix

Travel Retailing Technology Players



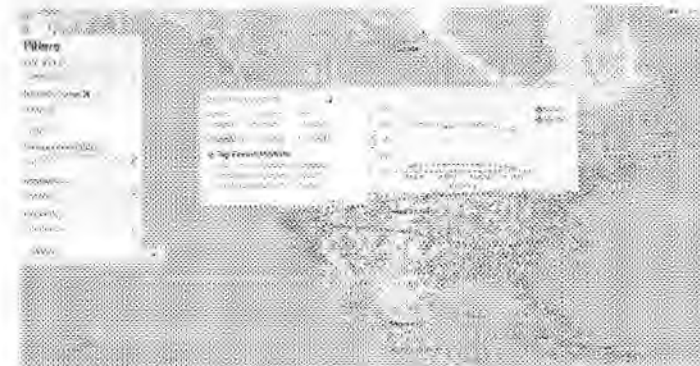
NGR capabilities are not simply concepts; Even the furthest out capabilities are available through niche technology providers creating partnerships with suppliers





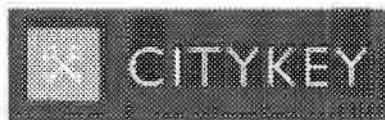
Connecting advertisers to their most valuable customers

- Leverages third-party and private data to connect brands with their most valuable customers - hundreds of millions of data points
- Media Solutions – leverages relationships with 175+ of the world's top travel brands to provide new ways to reach target audiences (provides a "full view" of the traveler purchase path to optimize marketing techniques)
- Insights Solutions – Actionable insights to help guide business planning from product development to marketing and communications – analytics solutions that deepen understanding of the audience and campaign performance
- Offers a "Traveler Value Score" capability based on search, booking, and loyalty data points



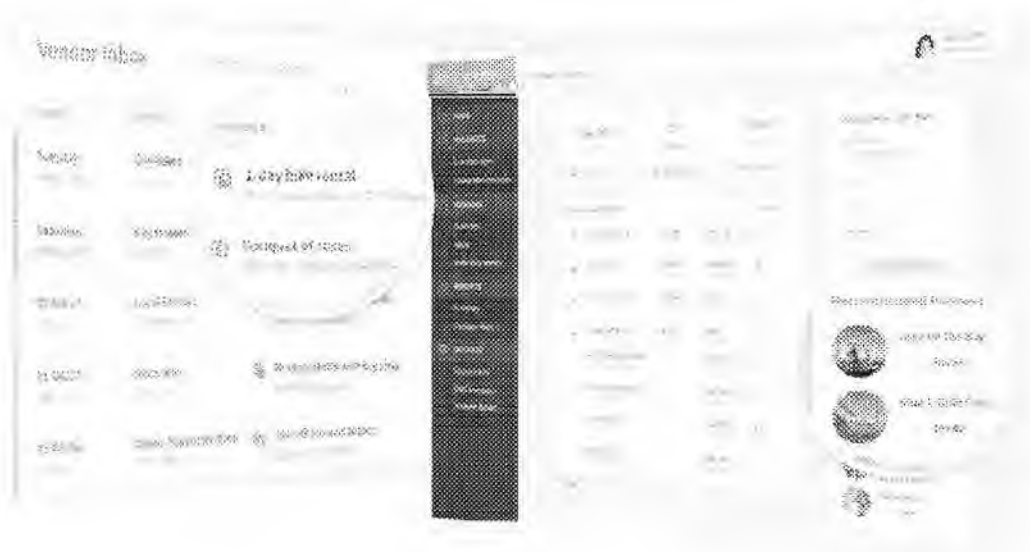
- 175+ travel data partnerships and providers, and 500 million travelers
- Identify high scoring customers with lower loyalty status to grow share of travel spend
- Leverage knowledge beyond demographic data to build customer lifetime value models
- Apply the score across referral channels for a deeper understanding of how to invest in marketing





Helps connect hotel partners and local businesses to sell experiential travel packages

- Based on the idea that local businesses will want to push their offers through with local hotels





Ability to purchase distressed inventory for flight upgrades

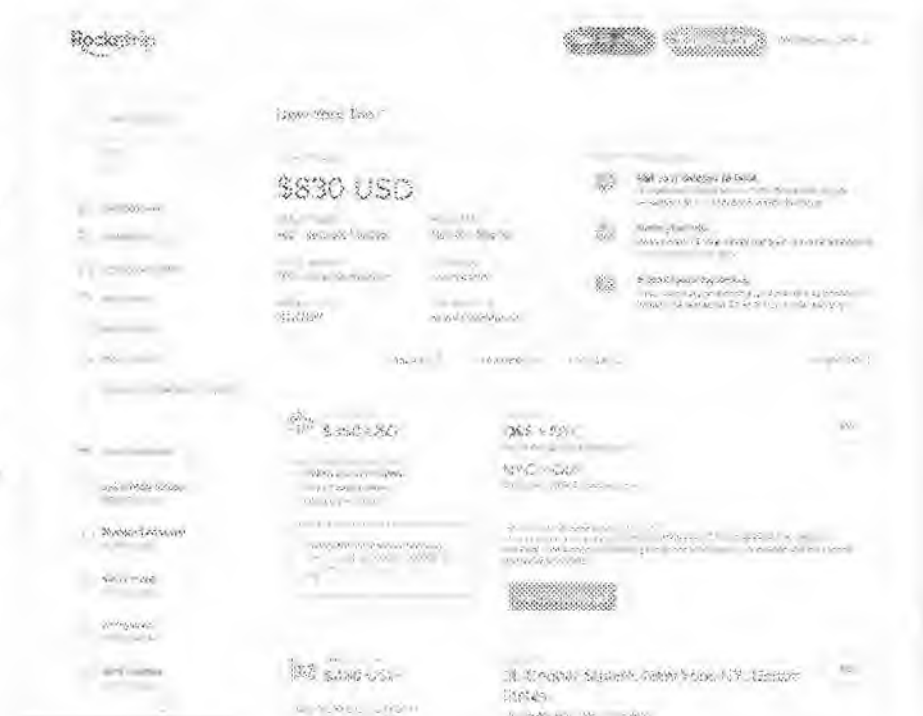
- Seats and across ancillary types including: empty seat hold, preferred/upgraded economy seat, extra baggage, lounge access, priority handling, and a "flight pass" redeemable for multiple flights
- The traveler selects and pays for the bid up front, is notified via email about upgrade status 4 hours – 3 days prior to departure, if not upgraded the upgrade refund will be made 5 days after flight departure





Trip cost estimation with employee rewards for travel savings

- Open booking portal and some light OBT integration, working on deeper integration with Concur and pursuing other OBTs
- A trip cost is estimated based on initial search parameters, the traveler is rewarded for booking under that threshold (half of savings to the travel in gift cards, the other half to the corporation net Rocketrip's fee)
- Requires expense collection via email parsing, Concur expense integration, or the manual input of receipts
- ~12% net savings for companies using Rocketrip





Hotel rate protection and auditing

- Monitors booked hotels for price drops, or competing hotel properties and notifies the traveler or TMC for rebooking
- Establishes hotel clusters based on what is booked, shops the selected rates daily, and then notifies when savings are found
- Very configurable to allow for notifications based on traveler/corporation/TMC preferences ... only for same hotel same room type, allowable for similar hotel and room type, allowable for any hotel within a certain mile radius, etc.
- Has pursued complementary offerings such as corporate negotiated rate auditing and optimization, and analytics and competitor offers for hotels



See historical price changes for this hotel and compare it to other hotels in the same area. From 1/1/17 to 1/1/17.

The price is \$415.00 per night and is a guaranteed rate. You can change your current hotel booking to the following alternative hotel and rate if you have a change of mind. All rates include taxes and fees.

Current Hotel Rate	New Hotel Rate
<p>\$415.00 US/night at New York Marriott Downtown</p> <p>Room Type: Standard Room Rate Type: Standard Room No: 101 Room Size: 140 sq ft Room Amenities: Free Wi-Fi, Free Local Calls, Free Parking</p>	<p>\$175.00 US/night at Doubletree Hotel New York City Financial District</p> <p>Room Type: Standard Room Rate Type: Standard Room No: 101 Room Size: 140 sq ft Room Amenities: Free Wi-Fi, Free Local Calls, Free Parking</p>
<p>Total savings of \$240.00</p>	

Cancel Current Hotel Booking
 Rebook New Hotel Booking

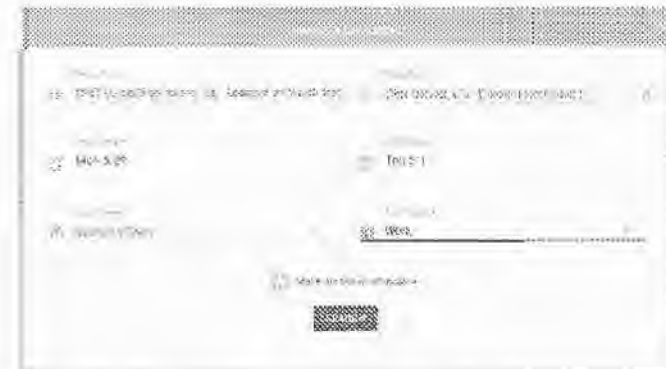
Cancel Current Hotel Booking
 Rebook New Hotel Booking



UPSIDE

Gift card rewards to travelers for booking bundled flights and hotels

- Focused on increasing attachment rate in business travel by selling bundled flights and hotels
- Masks the specific price for flight or hotel so as to keep the price private – only showing the total amount for the package
- Attempts to deliver back flight and hotel options that are most relevant to you and your trip (limited dataset to do that)
- Promises lower prices (5-10% on average) as well as a \$100 - \$300 gift card for the traveler
- Gift cards are toward 50+ national retailers





Freebird

Helping travelers overcome flight disruptions with an agnostic rebooking service

- Mobile solution that allows travelers to “instantly” book a new ticket after a flight cancellation, significant delay, or missed connection on any airline for free with “only three taps on their phone”
- Does not require an app download, just the purchase of a subscription to apply to your trips (its like disruption insurance)
- Per-trip cost around \$20





bd4travel

Big data and personalization in real-time

- Uses real-time digital empathy, personalization and predictive insights to improve the way consumers purchase travel products
- Profiles individual users in real-time, then instantly determines what the most relevant product, service, or content is to recommend to them based on your portfolio
- Primarily an online tool, includes a "call center" capability to guide phone-based agents



Real-time digital empathy, personalization and predictive insights to improve the way consumers purchase travel products

Profiles individual users in real-time, then instantly determines what the most relevant product, service, or content is to recommend to them based on your portfolio

Primarily an online tool, includes a "call center" capability to guide phone-based agents

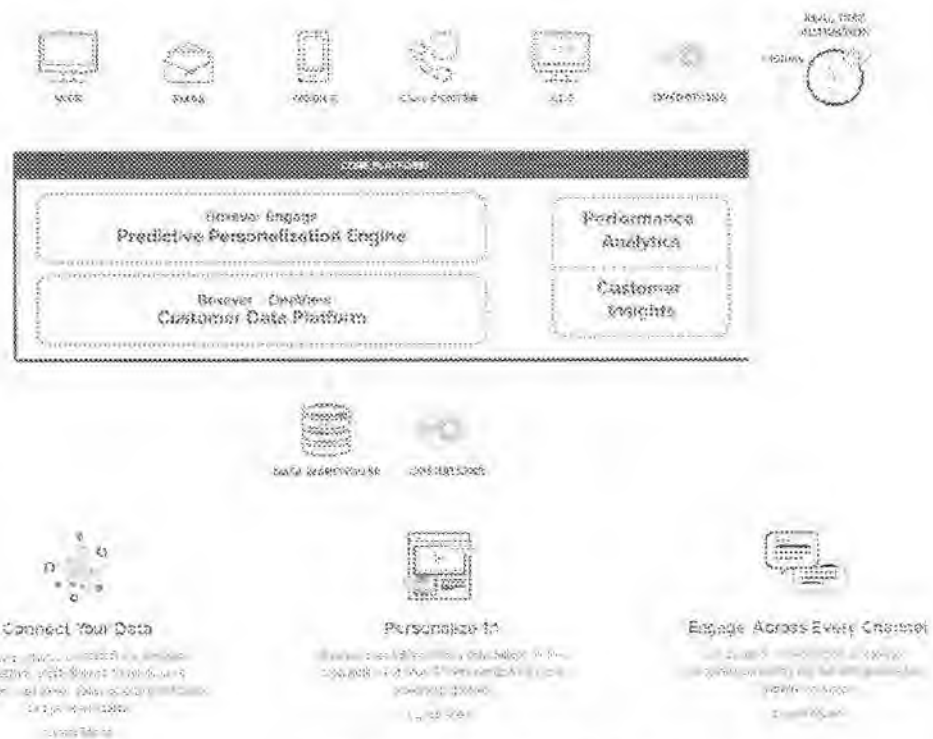




BOXEVER

Customer Intelligence Cloud to drive personalized experiences and offers

- Claims to be "channel and technology agnostic no matter what systems you have in place"
- Platform and solution is based on being able to feed richer data into AI platforms, it pulls fragments of information from disconnected marketing, commerce and customer service systems to create a single and contextual customer view
- Propensity to purchase, propensity to churn, transaction value, and lifetime value are created
- Solutions defined for airlines, financial services, retail, travel and hospitality
- 7 airlines are listed as customers on their website



Lola

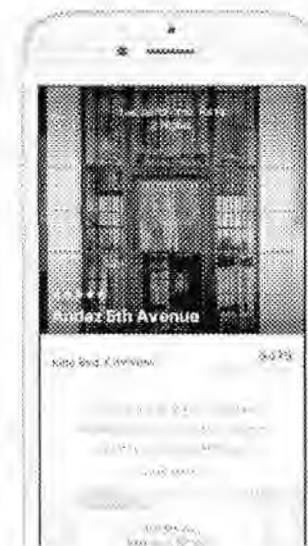


Persona-based Offers

lola

A personal travel agent

- Recommend flights, hotels, and more tailored to your needs and preferences
- Backed by real-live travel consultants/experts -- but a blend of AI and live agent assistance



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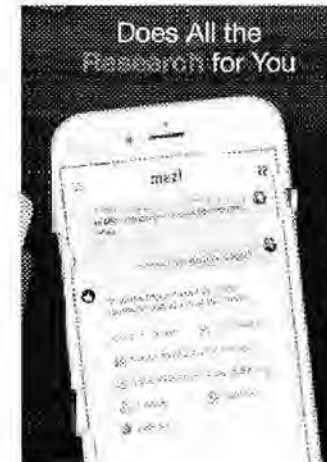


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Personal travel shopping assistant

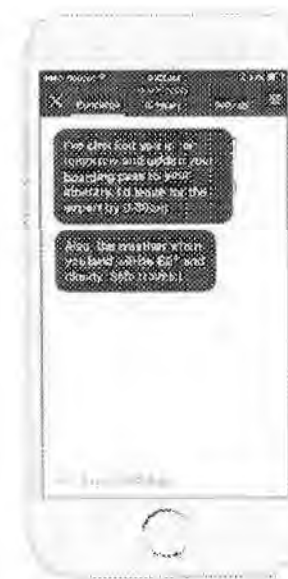
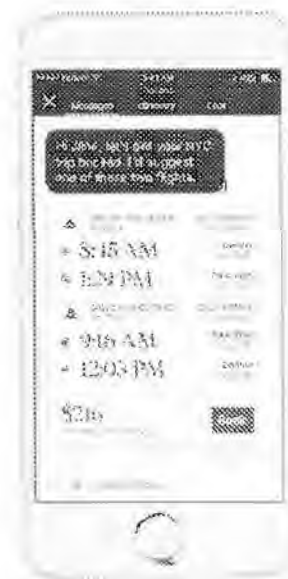
- Collects traveler preferences, learns and builds a robust travel profile over time to deliver travel recommendations across flights, car rental, hotel, and dining
- Leverages natural language messaging for travel booking
- Goes beyond booking to also assist in transit through recommendations for things to do, as well as supporting changes to your itinerary and handling all travel-related payment transactions





Personal travel assistant for travelers

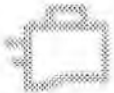
- Recommend flights, hotels, cars and more tailored to your needs and preferences
- Automatic flight check-in
- Travel re-accommodation
- Job candidate travel management



Snap Travel



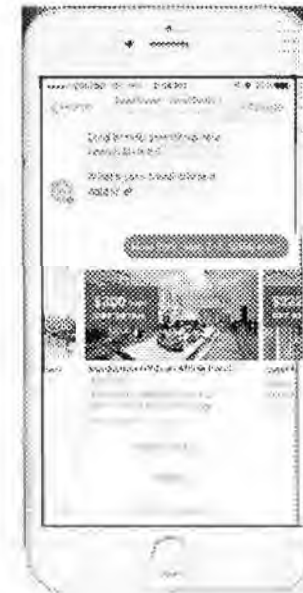
Persona-based Offers



SnapTravel

Hotel deals over messaging

- Only available for hotels
- Messaging via SMS text and Facebook Messenger
- Hotels sell distressed inventory to Priceline and Hotwire because these prices are too low to show publicly, Snap Travel lets you book these same rates without having to guess at the property because the price is not shown publicly – only 1:1 chat

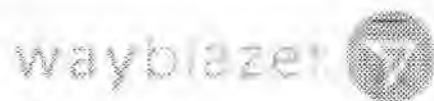


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Artificial Intelligence capabilities for travel companies

- Supported by IBM Watson
- Understands the type of trip and profile of that particular user will take through a series of triggers and cues
- Merchandizing AI – Personalized display optimization based on images, property sorting, traveler reviews, and local area knowledge
- Natural Language Search AI – Ability to interpret natural language search results to optimize search results
- Destination AI – Determining personalized traveler destinations based on what would be attractive for each traveler





Book hotels and earn FF miles

- Shop and book hotel rooms via the Rocketmiles portal
- Earn FF miles across a variety of airlines
- "Most frequent travelers earn an extra 80k miles per year"





Book hotels and earn miles and points

- Shop and book hotel rooms via the PointsHound portal
- Earn FF miles across a 19 different airlines



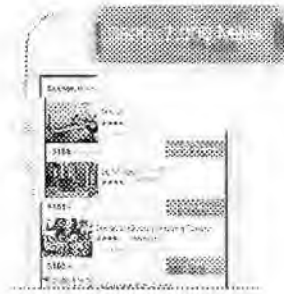
Select Program

1. Select your preferred program to earn miles and points.



Pick Your Hotel

2. Pick your preferred hotel to book.



Learn the Most Miles

3. Select the hotel that offers the most miles for your stay.



PLUSGRADE

Traveler-led bidding for airline seat upgrades

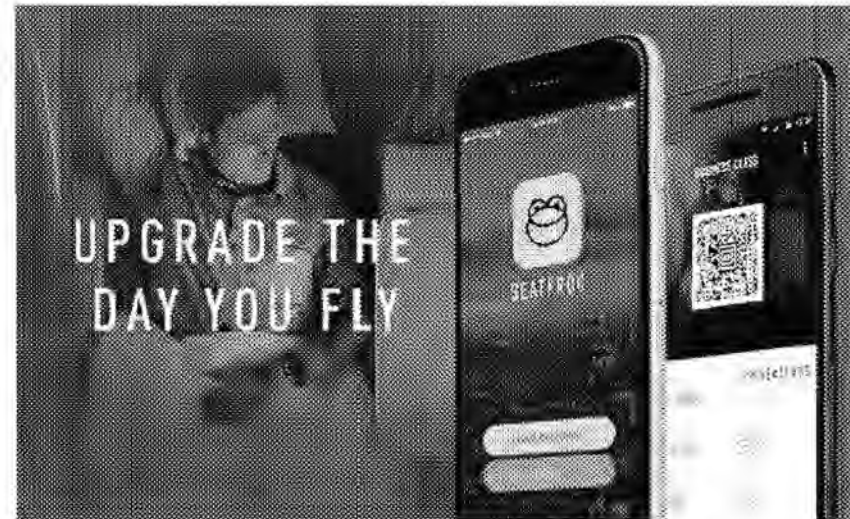
- Ability to bid against other travelers for upgrade opportunities
- 48 airlines are using this service





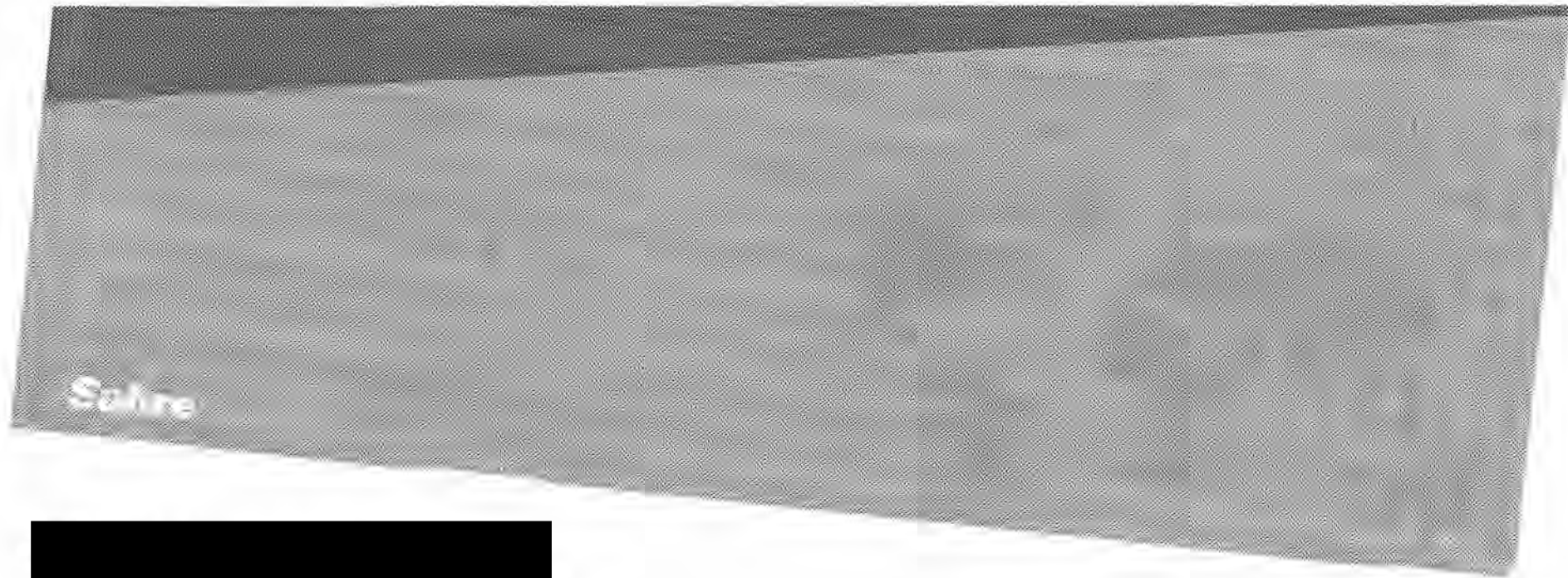
Same-day flight upgrades

- Add your flight to Seatfrog
- Peak upgrade intent is said to be within 48 hours of a flight departure
- Bid to upgrade your seat during a pre-determined amount of time pre-flight
- If you win a new boarding pass is delivered to your phone

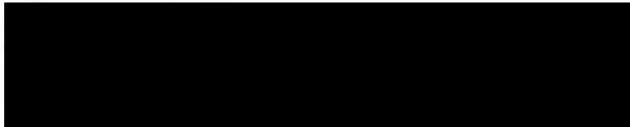


Appendix

NGR Capability Mock-ups



Saline



SABR-002856954



Frequent Business Traveler

"Make my life easier"

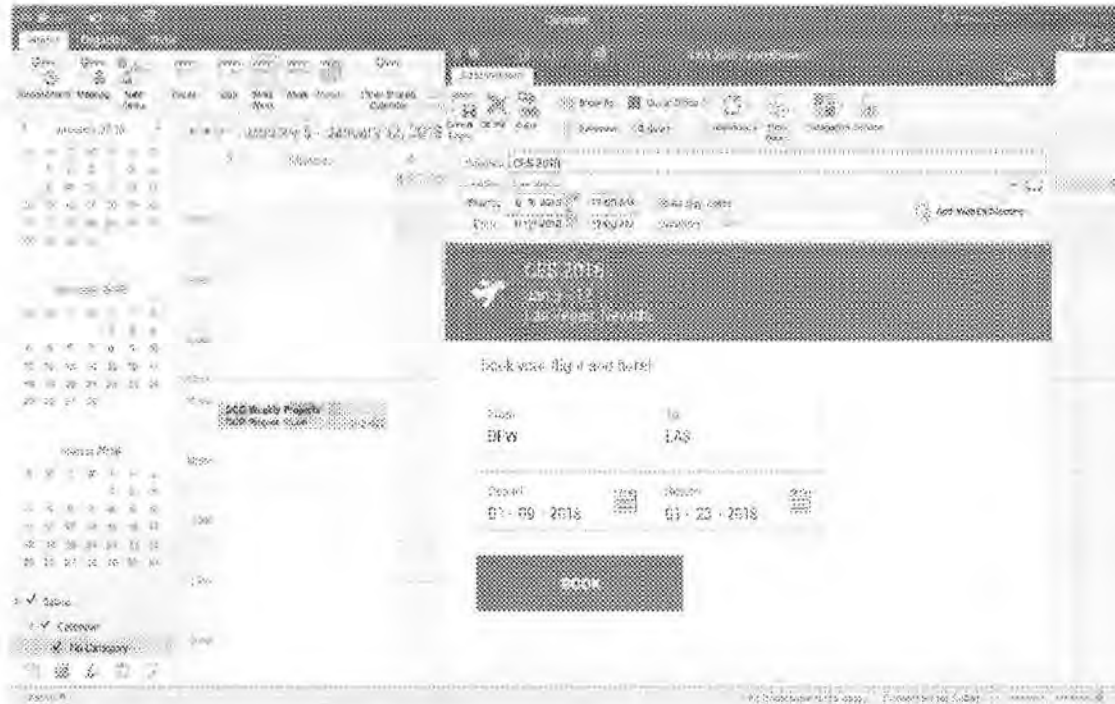
- 28 trips per year, often to same destinations
- Books through corporate booking tool
- Policy compliant
- High airline status

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Booking from Calendar



- **Booking from calendar**
 - Proactive offer based on scheduling a meeting in Microsoft Outlook
 - Flight recommendations are made in Outlook based on previous trips



Bleisure-based Offer



Booking from calendar

Proactive offer based on scheduling a meeting in Microsoft Outlook

Flight recommendations are made in Outlook based on previous trips

Bleisure-based offer

- Proactive offer via email to purchase a discounted airfare for a companion traveler
- Easily one-click book directly via the email offer or forward to a friend

Deep discounts for a traveling companion on your trip to Las Vegas



Reservations@CBT
Tuesday, May 2, 2017 11:52 AM
10/0/00



Hi Gail!

As a valued CBT customer, take advantage of discounted fares for a companion traveler. Whether it's a colleague or your CBT travel family member relaxing in Las Vegas, they will enjoy deep discounted savings on this trip.



Travel companion discounts available on this trip! Flights from \$199

Origin	Destination	Fare	Time	Class
OPW	LAS	\$345	9:00 am	17A

BOOK TODAY!

SEND TO A COMPANION



Dynamic Pricing - Ancillaries



Booking from calendar

Proactive offer based on scheduling a meeting in Microsoft Outlook

Flight recommendations are made in Outlook based on previous trips

Bleisure-based offer

Proactive offer via email to purchase a discounted airfare for a companion traveler

Easily one-click book directly via the email offer or forward to a friend

Dynamic pricing - ancillaries

- Significant airport activity and longer than normal security lines
- Offer via airline app en route to airport to purchase priority boarding for both travelers



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Infrequent Business Traveler

"Help me know what I should book"

- 4 trips per year
- Books through corporate booking tool
- Policy compliant
- Little to no airline or hotel status

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Negotiated Bundle



● Negotiated bundle

- Company-specific negotiated air bundle is displayed along with other basic ancillary bundles
- Bundle shows total savings over a la carte

The screenshot shows the 'Corporate Booking Tool' interface. At the top, it says 'Flight Results'. Below this, there are flight details including a price comparison table:

Basic	Basic	Basic	4:20PM - 6:10PM	19W	NYC	Nonstop
\$425	\$505	\$1280	07/23-08/01	Delta	A320	2H 17M

Below the table, there are two main sections:

- Your Custom Sabre Bundle:** Based on our past data, we have put together a custom bundle for you. It includes:
 - In-flight Meal
 - Free Checked Bag
 - Free Wi-FiA callout box shows a **\$45** savings with a 'SAVE \$25' badge. An 'ADD CLIP-ON BUNDLE' button is present.
- Basic Air Bundle:** Includes:
 - Upgrade Status
 - Carry-on Baggage
 - Free Wi-FiA callout box shows a **\$70** savings with a 'SAVE \$30' badge. An 'ADD' button is present.



Affinity Recommendation



Negotiated bundle

Company-specific negotiated air bundle is displayed along with other basic ancillary bundles

Bundle shows total savings over a la carte

Affinity recommendation

- Initial shop returns all company preferred hotels
- Results are sorted based on company policy and preferencing
- One is highlighted as most frequently booked by his colleagues



Corporate Booking Tool

Hotel Results

	The Roosevelt Flat-screen TV with cable channels are featured in all rooms, and you can enjoy WiFi, rates, and hair dryers.	\$154.00 per night	ROOM DETAILS
● 50% of Sabre employees have stayed at this hotel			
	Yotel at Times Square You can enjoy cable TV, free local calls, and more, featured in all 716 sleep pods, rooms, and suites to enhance your stay.	\$178.00 per night	ROOM DETAILS
	Park Central You can enjoy LCD TVs with digital channels, and all 100 rooms feature amenities, including, and coffee/tea making.	\$210.00 per night	ROOM DETAILS
	Salisbury Hotel The fully equipped kitchen, complete with granite countertops and GE Monogram stainless steel appliances.	\$235.00 per night	ROOM DETAILS

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Bleisure-based Offer



Negotiated bundle

Company-specific negotiated air bundle is displayed along with other basic ancillary bundles

Bundle shows total savings over a la carte

Affinity recommendation

Initial shop returns all company preferred hotels

Results are sorted based on company policy and preferencing

One is highlighted as most frequently booked by his colleagues

Bleisure-based offer

- This is a new destination for the traveler so a complementary leisure offer is made
- The first offer is to extend the trip with a stay with a hotel partner
- Also receives an offer for a half-day city tour via content from a third-party tour provider



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SABR-002856962



Unmanaged Business Traveler

"I need to find the best deal"

- 10 trips per year
- Books through an OTA or supplier direct
- Budget-based travel program
- Little to no airline or hotel status

Score



Persona-based Offer



Persona-based offer

- Based on profile data and flight search parameters a persona-based offer is delivered
- Bundle includes Wi-Fi, return flight flexibility, and priority boarding for a business traveler
- Bundle shows value over a la carte and other points of sale

The screenshot shows the WorldwideAir website interface. At the top, there's a search bar and the logo. Below, it displays flight search results for a route from London to New York. The results are organized into sections: 'Selected Flight' with a price of \$309, 'Flight Results' with various options and prices (e.g., \$309, \$435, \$1128), and a 'Bundle' offer for \$54. The bundle includes priority boarding, flexible return flights, and Wi-Fi. A comparison table at the bottom shows the bundle's value compared to other services like Expedia and Orbitz.



Supplier Cross-sell



Persona-based offer

Based on profile data and flight search parameters a persona-based offer is delivered

Bundle includes Wi-Fi, return flight flexibility, and priority boarding for a business traveler

Bundle shows value over a la carte and other points of sale

Supplier cross-sell

- Prior to purchase a discounted hotel offer is presented
- Hotel receives positive reviews, is often selected by business travelers, and is validated as a good price relative to other hotels and travel sites



WorldwideAir

Welcome, Mary
Rewards# 8833

Because You Booked a Flight to Seattle

Only \$205/night for 3 nights. Includes breakfast, Wi-Fi, and more. Book now before it's gone!

\$205
PER NIGHT

4.8 (489) 4.8/5

BOOK NOW

Traveler-led Bidding



Persona-based offer

Based on profile data and flight search parameters a persona-based offer is delivered

Bundle includes Wi-Fi, return flight flexibility, and priority boarding for a business traveler

Bundle shows value over a la carte and other points of sale

Supplier cross-sell

Prior to purchase a discounted hotel offer is presented

Hotel receives positive reviews, is often selected by business travelers, and is validated as a good price relative to other hotels and travel sites

Traveler-led bidding

- En route to the airport, the traveler submits a bid for an economy plus seat upgrade
- The traveler is notified via text and a push notification that her offer was accepted



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SABR-002856966



VIP Business Traveler

"I need help creating the right itinerary"

- 18 trips per year
- Books through admin or VIP desk at TMC
- Flexibility and schedule drives all decisions
- High airline and hotel status

SolAm

Profile-led Dynamic Offer



Dynamic offer

- Contacts VIP desk agent for an upcoming international trip
- Based on traveler preferences and previous travel history, a custom itinerary is developed

The screenshot shows the Sabre Red Workspace interface for a user named Michael Panayiotou. The page includes a navigation bar with 'Sabre', 'Sabre Red Workspace', 'FAVORITES', 'TOOLS', 'COMMUNITY', and 'RED APP CENTER'. Below the navigation, there are tabs for 'Profile', 'Air', 'Hotel', 'Car', and 'More'. The profile section displays the user's name, title (CEO, Aegean Publishing), home airport (LAX), and preferred stopover (London). It also shows a 'Status' as 'In Travel' and a 'Profile' button. The 'Air Preferences' section lists 'BRITISH AIRWAYS' and 'UNITED'. The 'Hotel Preferences' section lists 'FOUR SEASONS'. The 'Recent Trips' section shows a table of travel history.

Date	Destination	Booking Reference	Amount
00/14/2017	ATHENS	02817261	\$1061
00/22/2017	LONDON	06577413	\$1245
00/22/2017	LONDON	08425515	\$1010



Custom Itinerary



Dynamic offer

Contacts VIP desk agent for an upcoming international trip

Based on traveler preferences and previous travel history, a custom itinerary is developed

Dynamic offer

- The itinerary constructed is based on his preferred airline, loyalty status, preferred seat location, and favorite route
- Corporate policy is also taken into consideration in developing the itinerary

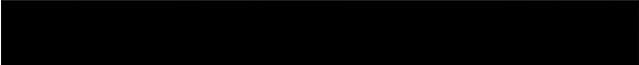
Sabre
Sabre Red Workspace
FAVORITES
TOOLS
COMMUNITY
RED APP CENTER

Profile ✈️ Air 🏨 Hotel 🚗 Car ⋮ More Applied Filters

Custom Itinerary: M. Panayiotou, Roundtrip NYC - Copenhagen

Aisle Seats Window Seats End Row Seat Together Nonstop Only SubTotal: \$2987

Class	Price	Best Price	Time	Airline	Service	Options
Economy	\$708	\$1309	7:15AM - 9:35AM	JFK → CDG	Nonstop	⚙️
Economy	\$759	\$1609	5:30PM - 8:35AM	LHR → CDG	Nonstop	⚙️
Economy	\$895	\$1862	7:15AM - 9:35AM	JFK → CDG	Nonstop	⚙️
Economy	\$954	\$1916	7:15AM - 9:35AM	JFK → CDG	Nonstop	⚙️



Competitive Offer



Dynamic offer

Contacts VIP desk agent for an upcoming international trip

Based on traveler preferences and previous travel history, a custom itinerary is developed

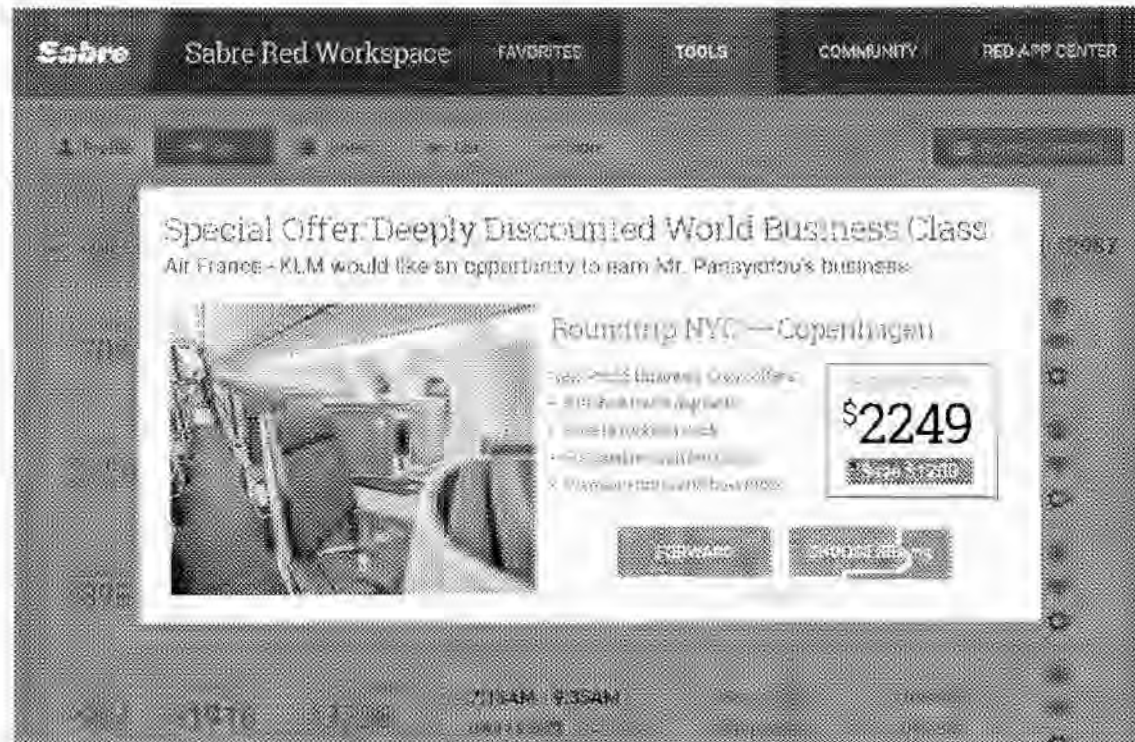
Dynamic offer

The itinerary constructed is based on his preferred airline, loyalty status, preferred seat location, favorite route, and required stop-over

Corporate policy is also taken into consideration in developing the itinerary

Competitive offer

- Receives an offer from another carrier for a deeply discounted upgrade to new business class experience
- Rich media highlights the new features and experience





Family Booking a Vacation

"I need simple and at a low price"

- 2 family trips per year
- Books through an OTA
- Pricing is driving factor for most decisions
- Mother is mid-tier airline traveler

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Recurring Trip



● Recurring trip

- Receives proactive offer from an OTA that it is time to book their typical summer beach trip
- Offers presented are based on previous travel history, not limited to just purchases through the OTA

Time to book your Miami vacation? Here's how

Time to book your beach vacation? Here's how

Offers@SIA
Sunday, May 4, 2014 11:03 AM
To: Mary

OnlineTravelAgent

Hi Mary
Get a head start on booking your annual vacation to Miami. Here are some suggestions based on the trips you've booked with us over the past few years.

Miami Beach Vacations for You

 The Biltmore Hotel \$599	 W Miami \$699	 Tides Beach & Beach \$799
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1/23/2014

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SABR-002856972

Dynamic Offer



Recurring trip

Receives proactive offer from an OTA that it is time to book their typical summer beach trip

Offers presented are based on previous travel history, not limited to just purchases through the OTA

Dynamic offer

- Upon shopping in the OTA, the traveler receives a special offer from a carrier for a new beach destination on mother's preferred airline
- Includes air, hotel, airport transfers, and option to upgrade to premium economy using miles

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The screenshot shows a dark header with the text "Online Travel Agent". Below the header is a large image of a tropical beach with palm trees and a sign that says "SAVE 1000". Underneath the image, the text reads "Your special Hawaii offer from WorldWide Air!". Below this, there is a list of offer details: "WorldWide Air", "Hotel: 3 nights at the Four Seasons Hotel", "Airport transfer", and "Option to upgrade to premium economy using miles, WorldWide Air miles". A large price tag shows "\$975". At the bottom left, it says "Book by June 1 and get the Island Tour and Meal package - a \$300 value!".

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SABR-002856973

Push Offer



Recurring trip

Receives proactive offer from an OTA that it is time to book their typical summer beach trip

Offers presented are based on previous travel history, not limited to just purchases through the OTA

Dynamic offer

Upon shopping in the OTA, the traveler receives a special offer from a carrier for a new beach

Includes air, hotel, airport transfers, and option to upgrade to premium economy using miles

Push offer

- En route to the airport there is a notification that there is a flight delay
- The traveler is presented with a discounted lounge pass and offer for ground transport at the destination

