



Shaping the Future of the Customer Centric Travel Ecosystem

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amadeus

The Fundamentals Don't Change

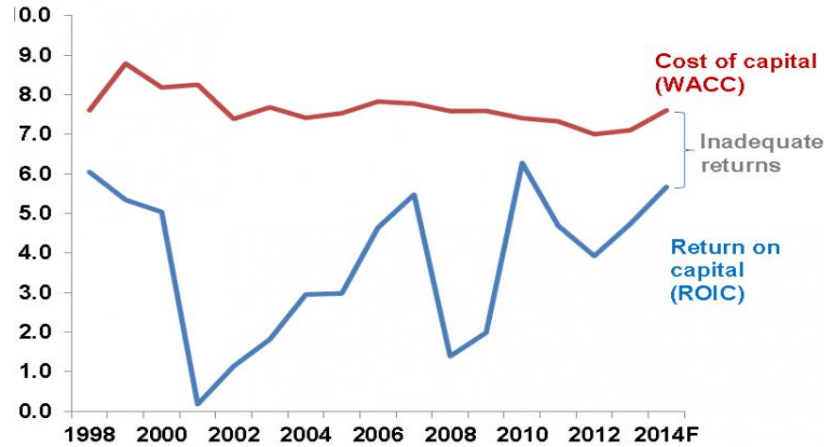
Airline profit

Global airlines are expected to make a profit of \$18.7 billion this year.

Reported and forecast profit of airlines by region - 2011 to 2014, in billion \$



Source: International Air Transport Association



HIGH IN THE SKY PROFITS

Combined net income of U.S. airlines:



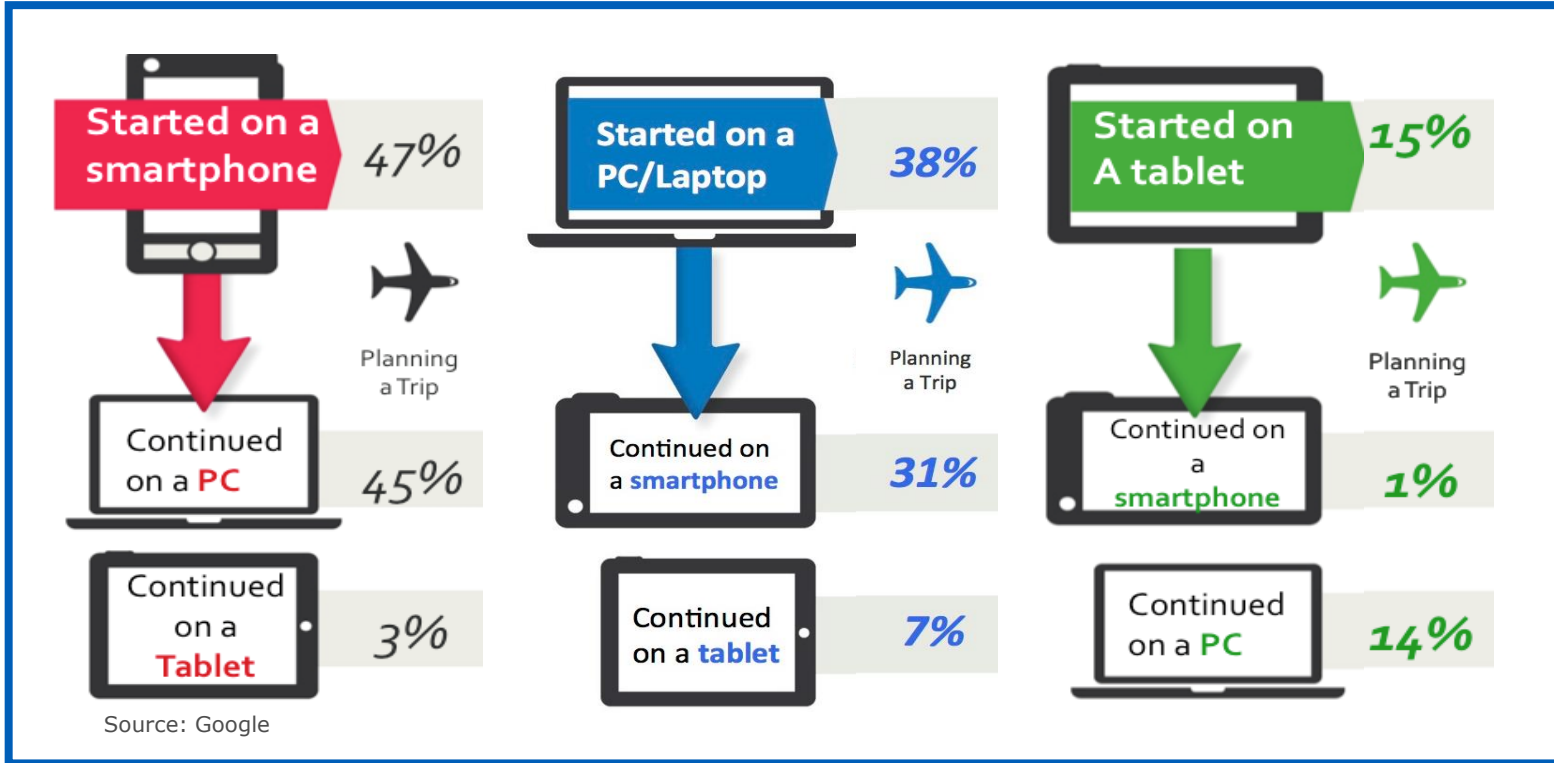
1 - first nine months

SOURCE: Department of Transportation
Bureau of Transportation
Karl Gelles, USA TODAY



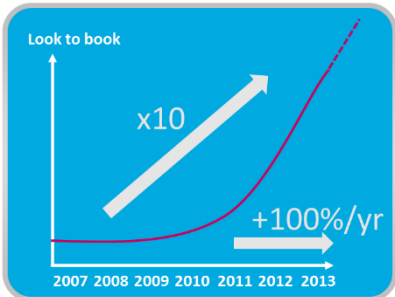
2014: IATA

Search is "broken"



LESS IS MORE.
[MORE OR LESS]

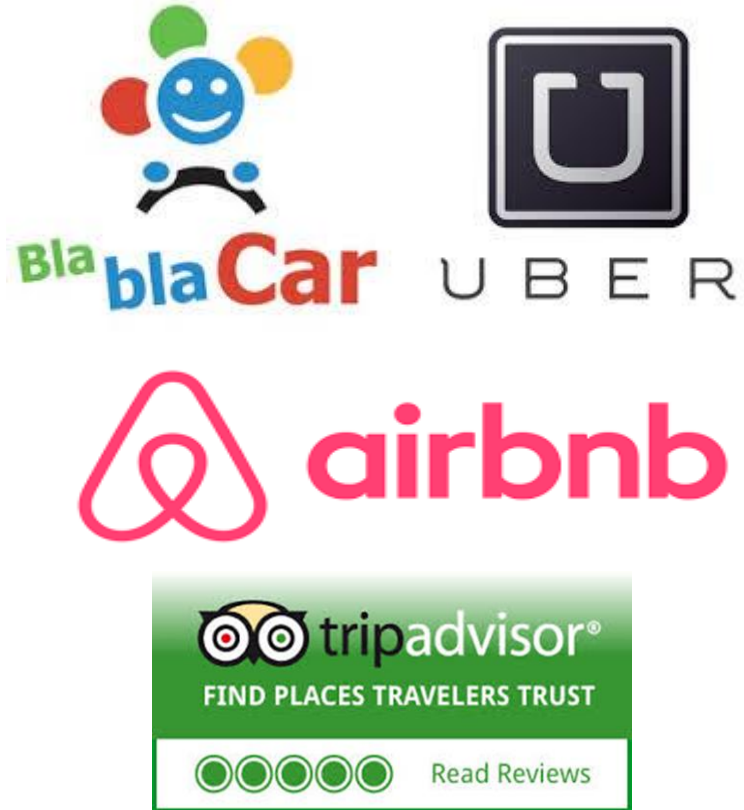
Look to Book Trend



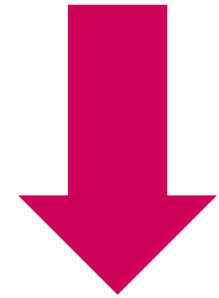
..will disruption come from outside?



Continued rise of the Meta....



**ASSET
OWNERSHIP**



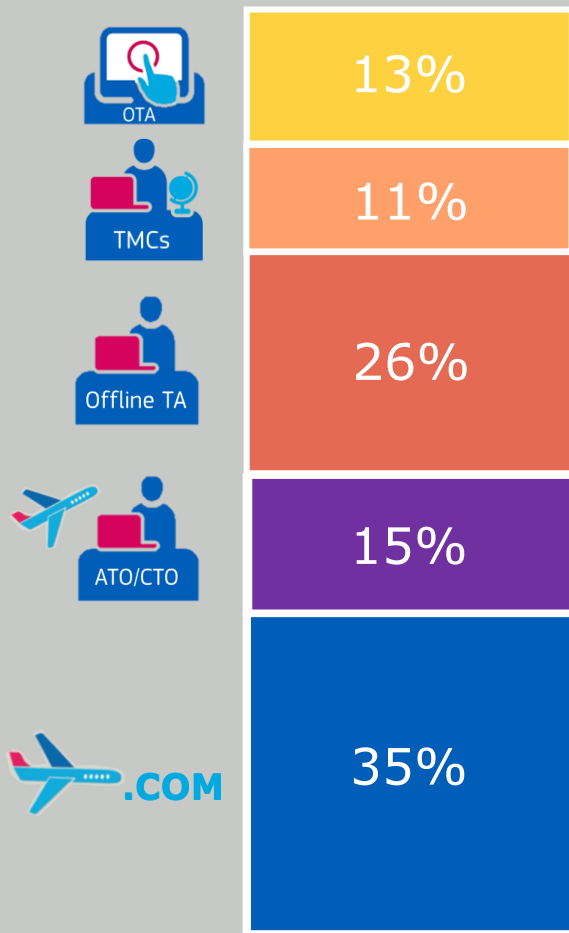
ACCESS

Re-Intermediation of the airline.com

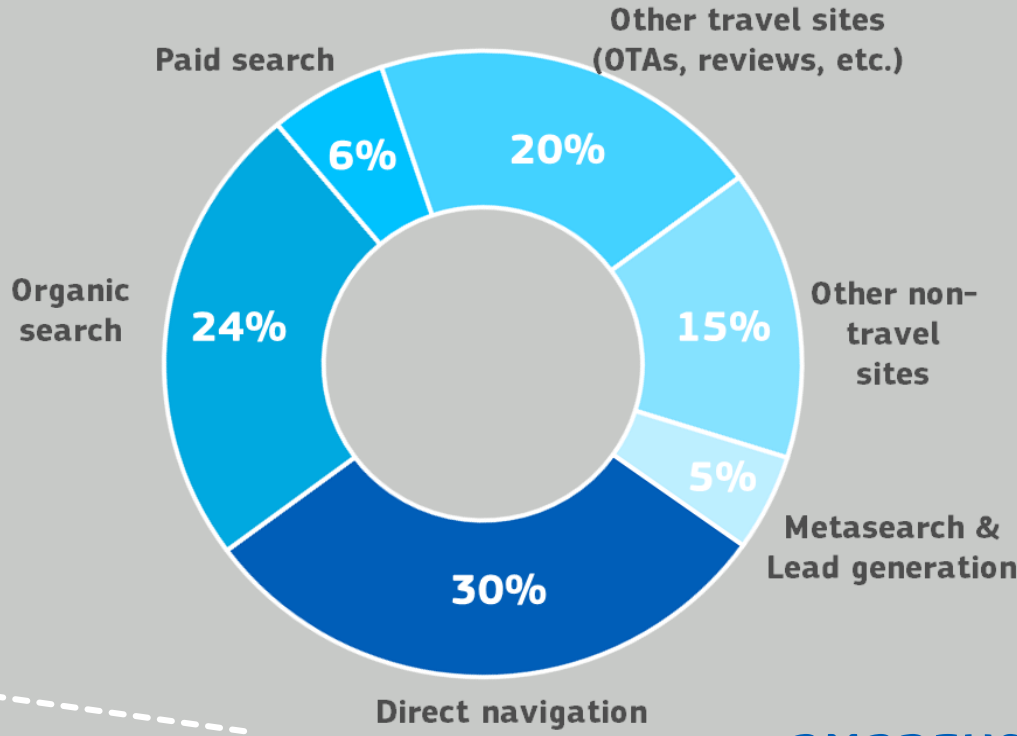
USD 50+
search engine
customer
acquisition cost

Point of Sale

Primary Referral

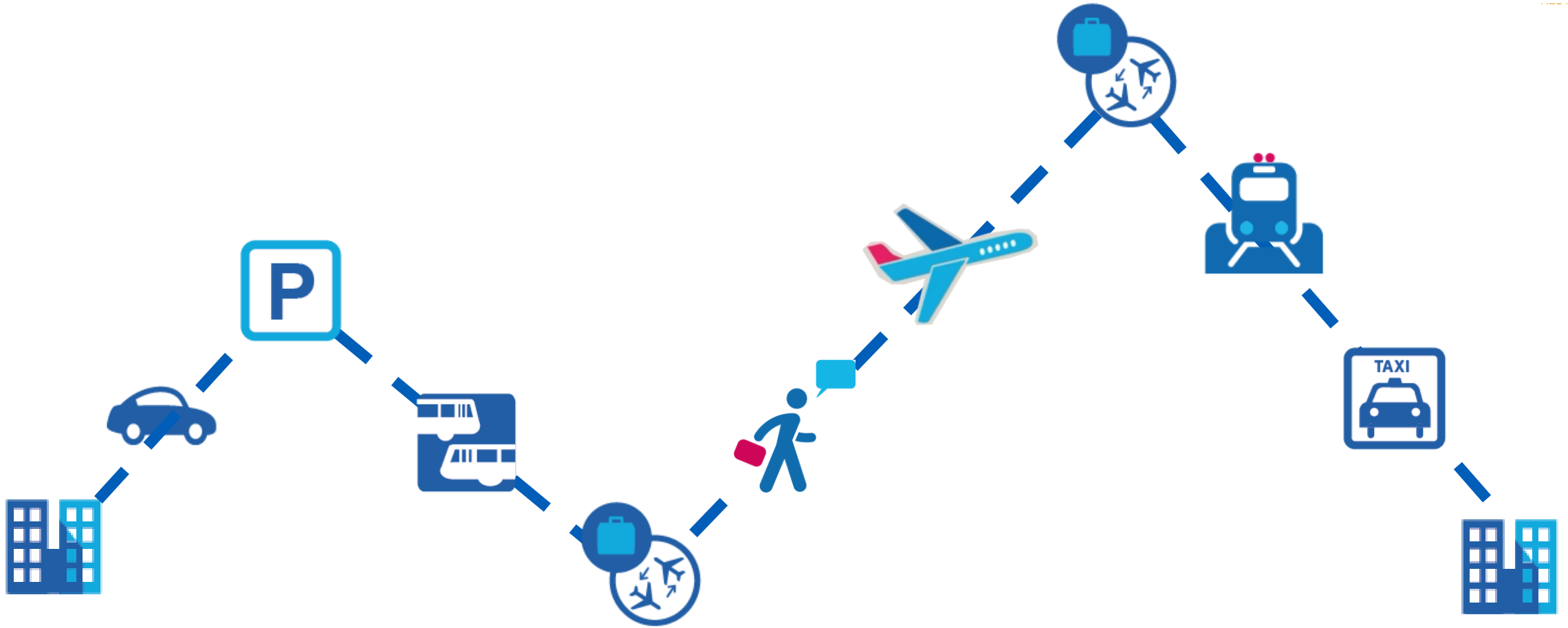


70% of airline.com bookings are referred by an ***intermediary***



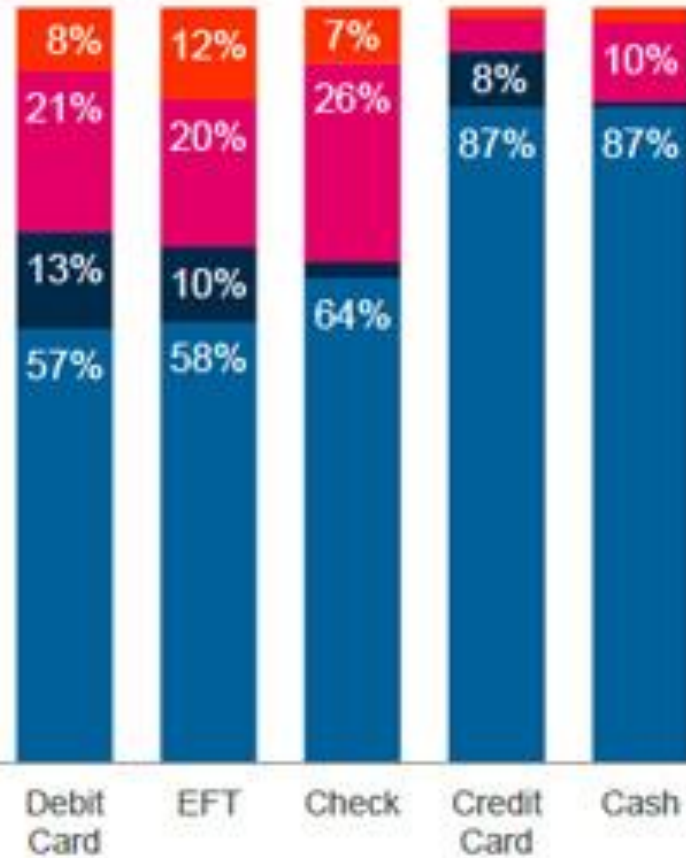
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Towards a seamless travel experience

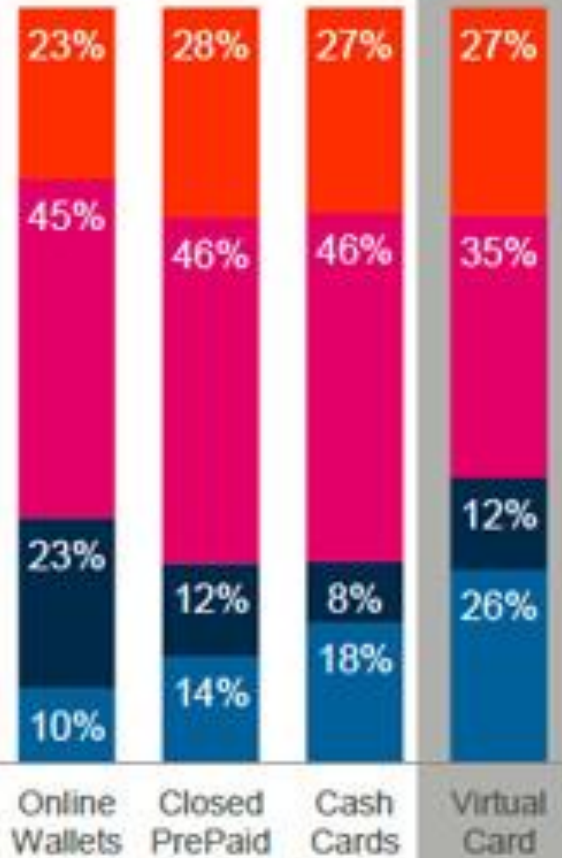


Payment solutions and money flows change

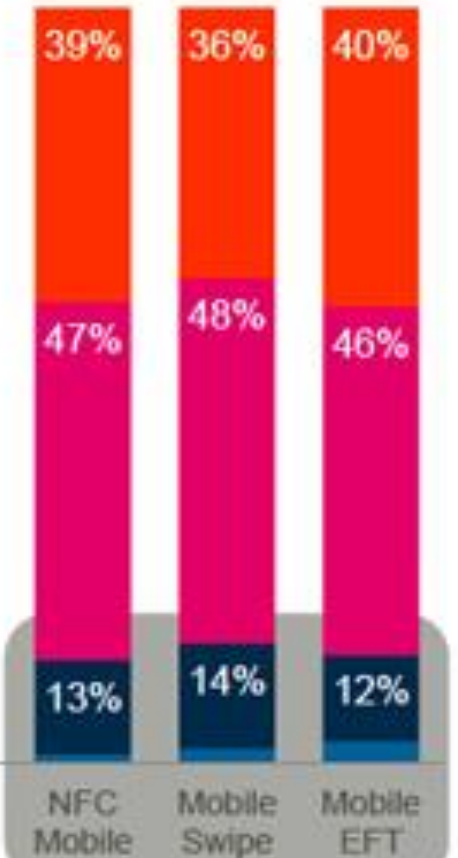
Conventional Payment Types



Emerging / Alternative



Mobile Payments



■ Already supported
 ■ Not yet but plan to do so
 ■ Not yet; no plans to do so
 ■ Don't know/not aware of

Source: PhoCusWright Payments Unsettled

Key Take Aways

- **A world of opportunity**
- **Demand for an end to end friction-less experience**
- **Ever connected traveler**
- **Art of segmentation & personalization**
- **Collaboration is the new norm to succeed in an interconnected travel ecosystem**
- **All about customer loyalty and share of wallet**

