

## SURVEY RESULTS

# Optimism and Obstacles

## TPConnects Travel Seller Survey 2023



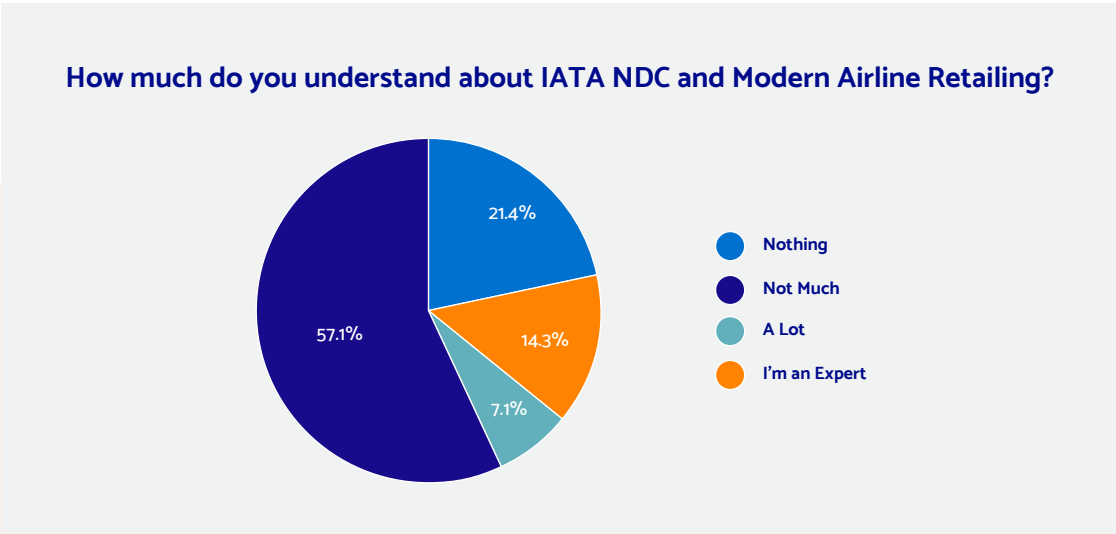
It has been another landmark year for Modern Airline Retailing as airlines have looked to increase control, flexibility, and customer-centricity by furthering their NDC programs. With trade partners' adoption of NDC channels critical to success, TPConnects surveyed retail travel sellers to provide insights into their views.

Our survey respondents represent **travel sellers in MENA, SEA and Europe.**

The results of the **TPConnects Travel Seller Survey 2023** offer some fascinating insights. While some findings may align with expectations, others are eye-opening.

2023 was the year that airlines from the four corners of the globe, including **United Airlines, Air France-KLM, Singapore Airlines, and LATAM**, to name a few, doubled down on their NDC distribution strategies. They focused on initiatives such as making the direct channel available to corporates, evolving surcharges and content differentiation, and strengthening GDS pass-through strategies<sup>1</sup>.

The high-profile nature of airline distribution this year is reflected in the TPConnects Travel Seller Survey 2023. The survey reveals that the overwhelming majority **(86%) of respondents have “heard of NDC and Modern Airline Retailing”**. Despite high awareness, a startling **64% admitted to understanding “nothing” or “not much” about the transformational programme**. Given that airlines are free to interpret standard schemas to develop their own versions, or ‘flavours,’ of NDC and go on to implement distinct adoption programmes, navigating this landscape can seem daunting. However, the survey shows that sellers remain optimistic about potential benefits.

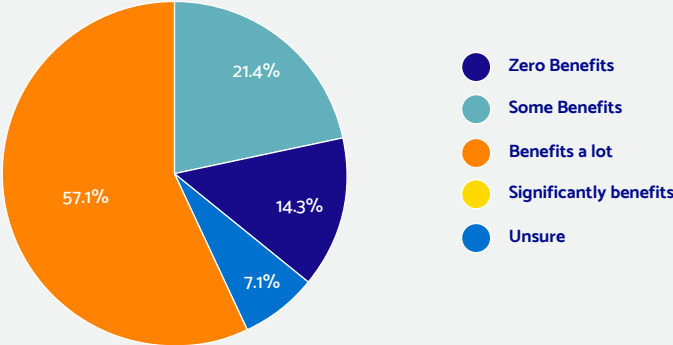


<sup>1</sup>Page 3, Oystin's Distribution Insights 2023, Oystin Advisory

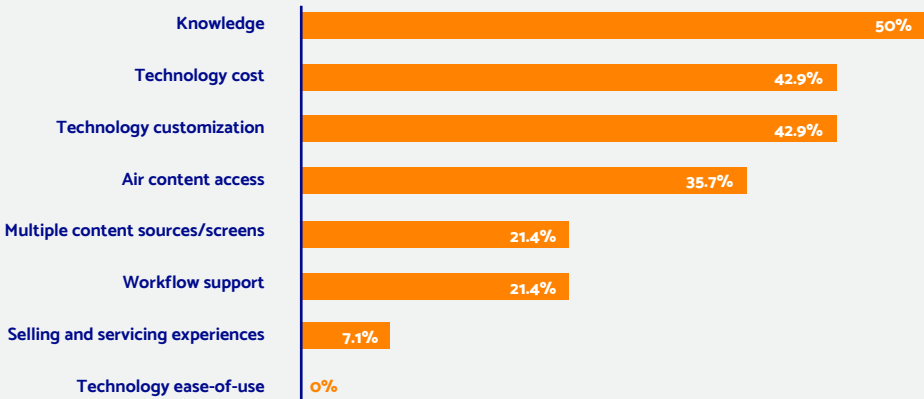
**57%** of respondents believed the programme could **benefit them “a lot.”**

Yet, this confidence has its challenges. Travel sellers identified three key obstacles holding them back from realizing these benefits: **knowledge (50%)**, **technology costs and technology customization (both 43%)**, with **air content access (36%)** also a significant concern.

To what extent do IATA NDC and Modern Airline Retailing benefit travel sellers like yours?



In your opinion, what is holding you back from adopting IATA NDC and Modern Airline Retailing? Select all that apply:



The good news is that technology such as **TPConnects Travel Seller Solutions**, can help travel sellers overcome barriers and capitalize on the opportunity at hand. TPConnects Travel Seller Solutions ensure that:



Agents get the right content for their customers, regardless of source (NDC, LCC, consolidator, GDS), in a single, customizable shop.



Agent-friendly sales and servicing workflows minimize training requirements.



A plug-and-play model with pay-as-you-go pricing keeps costs down.

Travel sellers not ready to embrace the full potential of Modern Airline Retailing, and those with fewer NDC bookings, may still access **NDC content directly from an airline's NDC portal**, such as the **Finnair Agency Sales Tool FAST** and **Gulf IATA NDC Direct Connect Solution**. These solutions are provided by TPConnects to its airline customers and most airlines with NDC content will offer similar solutions to their trade partners.



**George Rajan, VP Sales, TPConnects** said, “Content withdrawal and surcharges are not the only means for airlines to engage sellers. We will see more innovation soon in terms of dynamic offers and personalization. Travel sellers cannot afford to hold off evaluating the options and making some informed decisions. Fortunately, experts like TPConnects are here to help and I encourage sellers to reach out to discuss their choices.”

It is great to see travel sellers aware of NDC and Modern Airline Retailing in addition to optimism around the benefits. The value to travel sellers will strengthen in 2024 and beyond – we are at the tip of the iceberg.

**George Rajan**  
VP Sales, TPConnects

As 2023 ends, we can see it has been a **year of considerable momentum for NDC and Modern Airline Retailing.** However, the TPConnects Travel Seller Survey 2023 shows significant gaps in stakeholder alignment. Rather than waiting, travel sellers would be well-positioned to take the plunge and start evaluating the options - the way forward may be more straightforward than they think.

## Get in touch

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