

ARC



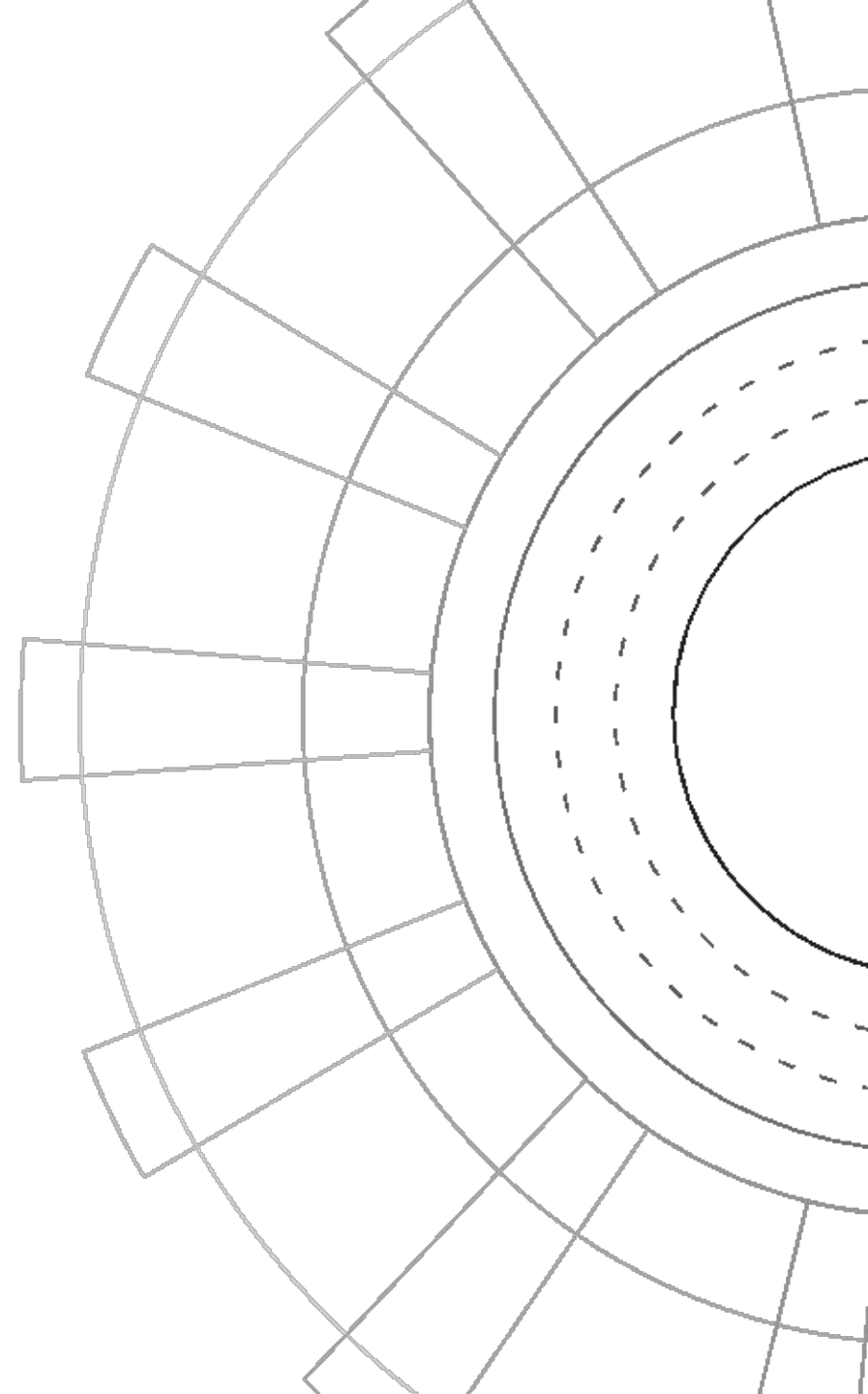
MODERN AIRLINE RETAILING:

SUPPORTING NDC GROWTH AND TRANSFORMING FOR ORDERS

Chuck Fischer

Vice President, Distribution & Financial Services

September 23, 2025



Legal Disclaimer

This session is presented for informational and educational purposes only. It may include content or use devices that serve merely to stimulate discussion and thought such as hyperbole, understatement, humor, figurative language, and the like. The views, thoughts, opinions, information, and materials comprising the presentation do not necessarily represent the opinions of Airlines Reporting Corporation's partners, clients, or customers. The content does not set policies, establish standards of care, or create guidelines. Nothing in this session should be construed as legal advice or an offer of representation. The presentation is not a substitute for independent professional judgment or legal advice concerning the law of a particular jurisdiction as applied to the full factual context of a unique situation or matter.

This presentation is the property of Airlines Reporting Corporation. Any distribution without express written permission from ARC is prohibited.

ARC

WHO'S ARC?

Board of Directors

Shareholders



AIR CANADA



American Airlines



DELTA

jetBlue

Southwest

UNITED



Non-Shareholders

AIRFRANCE



Lufthansa



Lauri Reishus
President & CEO

Independent

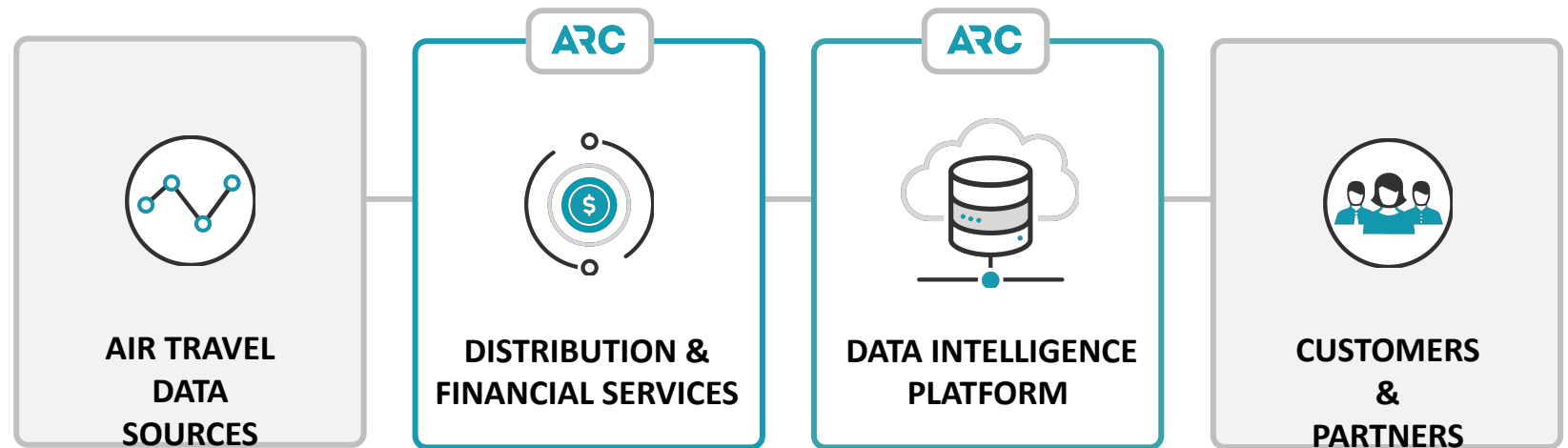
Bonnie Reitz
Chairman of the Board

About ARC

Our Vision

Be the preferred provider of data and services for airlines and their partners.

Our platform
connects the
airline distribution
ecosystem...



facilitating efficient
data exchange...

From airline **sales performance** to partner **accreditation, reporting and settlement**.

via a set
of core **enablers**.

Airline-Owned
Platform

Industry
Collaboration

Breadth of
Relationships

Proven Data
Stewardship

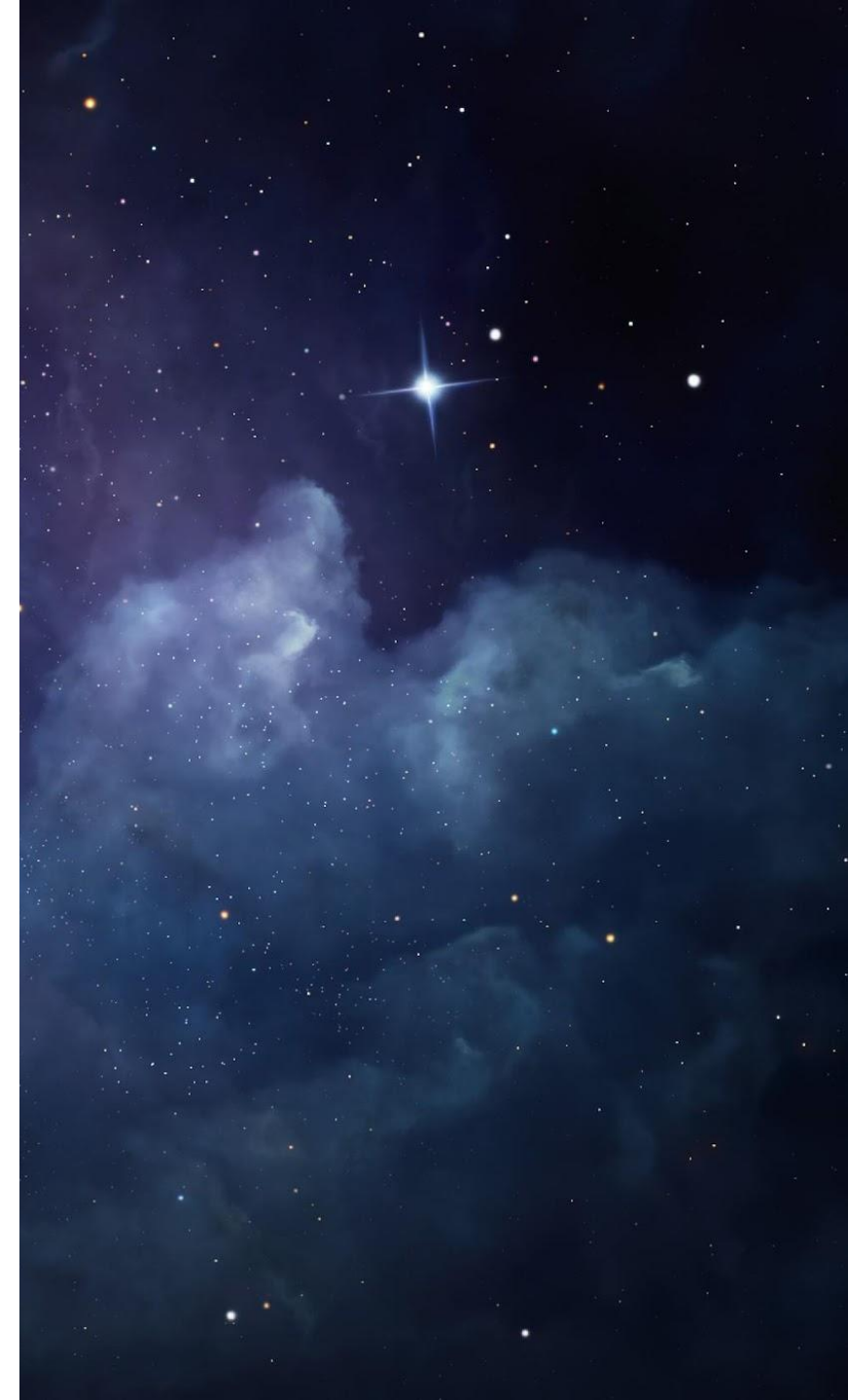
Reliability &
Innovation

ARC

OMNICHANNEL SOLUTIONS

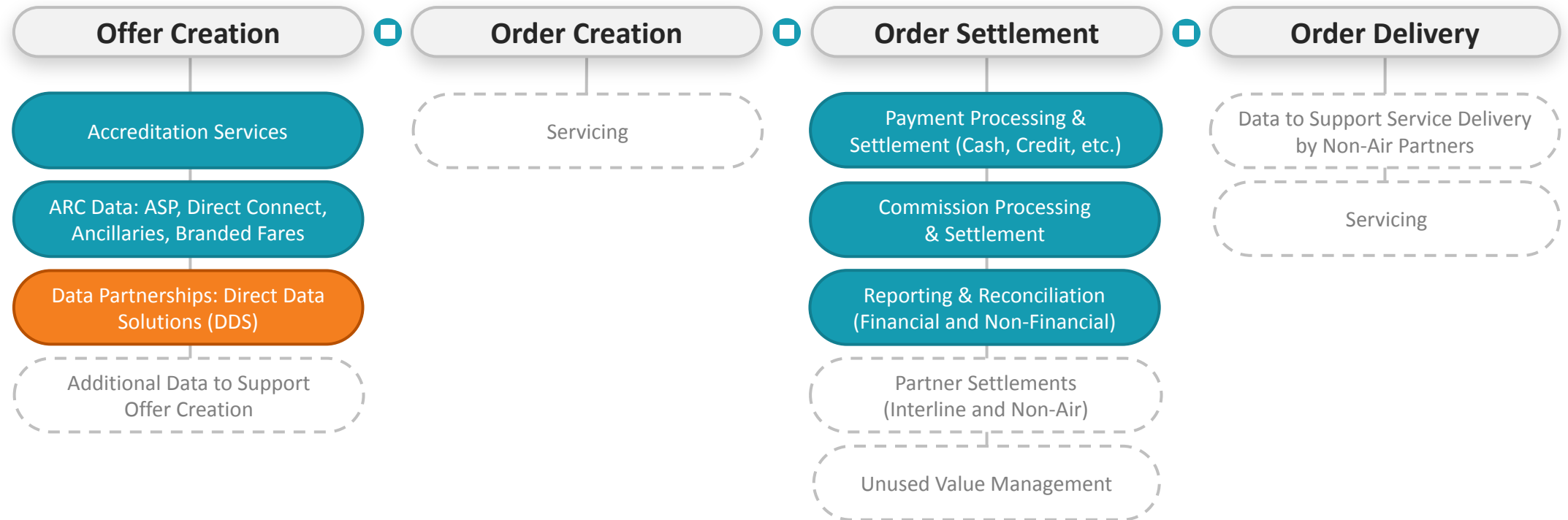
The Future of Airline Retailing

- Airlines will retail a broad array of products and services by:
 - Providing customers with consistent offerings across all channels.
 - Leveraging personalization to enhance customer experiences, increase loyalty and drive revenue.
 - Integrating seamlessly across JV, interline and partner ecosystems.
 - Making it easy for travelers to receive servicing in their channel of choice.
- Airlines and their partners will have access to trusted data that informs decisions, drives commercial strategies and strengthens customer relationships.



ARC's Role Supporting the Future of Airline Retailing

- Enabling airlines to retail and distribute products in ways that work best for them and their partners
- Providing efficient, cost-effective reporting and settlement services
- Ensuring airlines and their partners continue to have access to trusted data that informs decisions, drives commercial strategies and improves the overall customer experience



Existing or Planned Offering by ARC



Potential Future Offering by ARC



Existing or Planned Offering by ARC/IATA

ARC

ARC DIRECT CONNECT

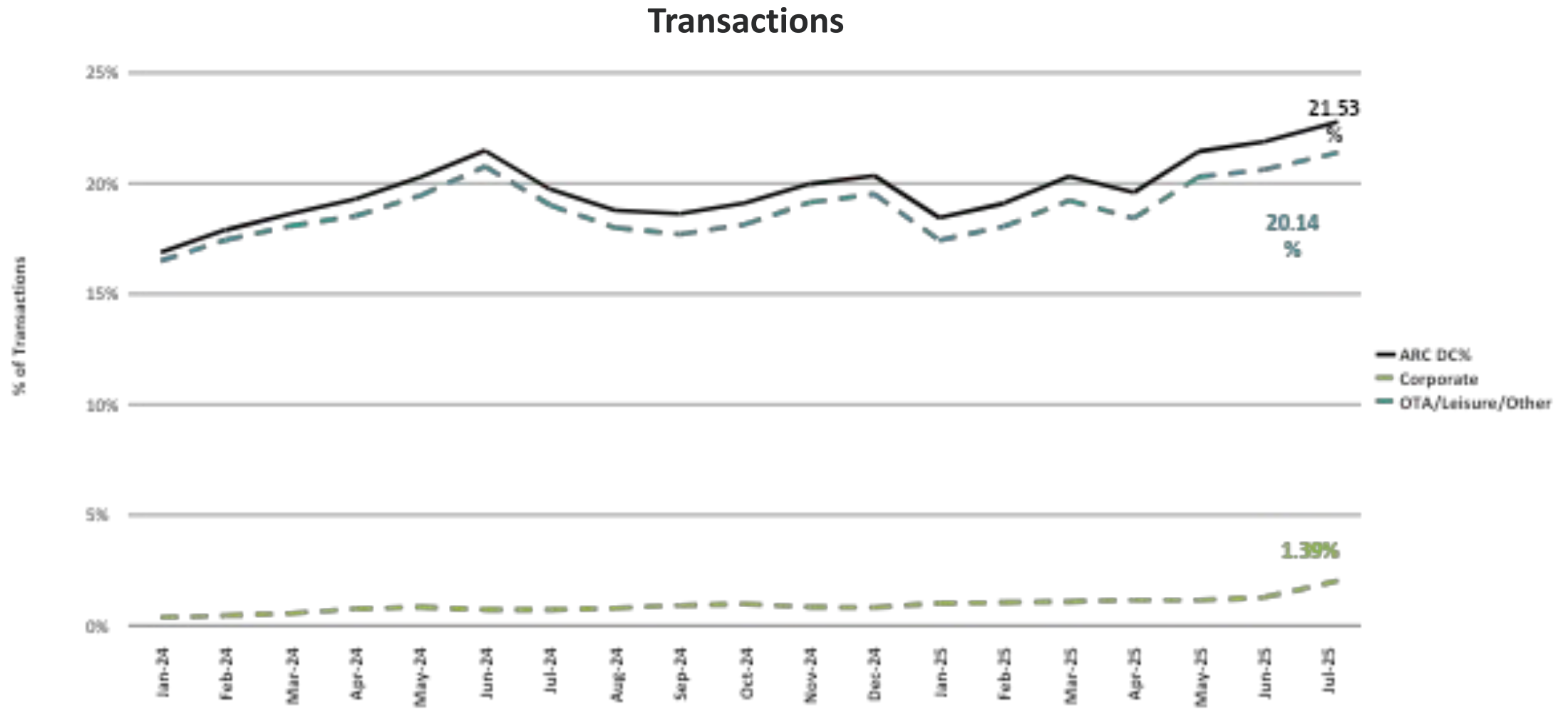
Direct Connect Participating Airlines

38 Airlines Currently in Production and 8 Awaiting Takeoff



Direct Connect Trends

NDC transactions as a percentage of all transactions processed



NDC Advancement Working Group

ARC is committed to helping airlines transform their distribution strategies to improve the buying experience for travelers.

Established in October 2023, the **NDC Advancement Working Group** provides a forum for the **air travel industry to collaborate and create best practices** that address noncompetitive challenges related to the advancement of NDC in corporate travel.

8

Global
Airline Brands

8

Global Distribution
Systems & Travel
Technology
Providers

6

Online Travel
Agencies &
Consolidators

13

Travel
Management
Companies

65+

Hours Together
During In-Person
Workshops &
Virtual Meetings

20

NDC Best Practices
Developed
(to date)

NDC Advancement Working Group Participants

35 Stakeholders From the Travel Ecosystem



NDC Advancement Working Group

What's Next?

- **Refine best practices** based on market feedback – published v1.1 in June and plan to publish v1.2 by EOY.
- **Track progress.** Plan to survey participants annually to gauge progress.
- **Transition** to orders.



ARC

TRANSFORMING FOR ORDERS

ARC's Orders Vision

Supporting the industry's transition from e-tickets to orders



Data In

APIs to accept
real-time
order-based
transactions and
updates



New platform
capable of
settling orders
in real-time



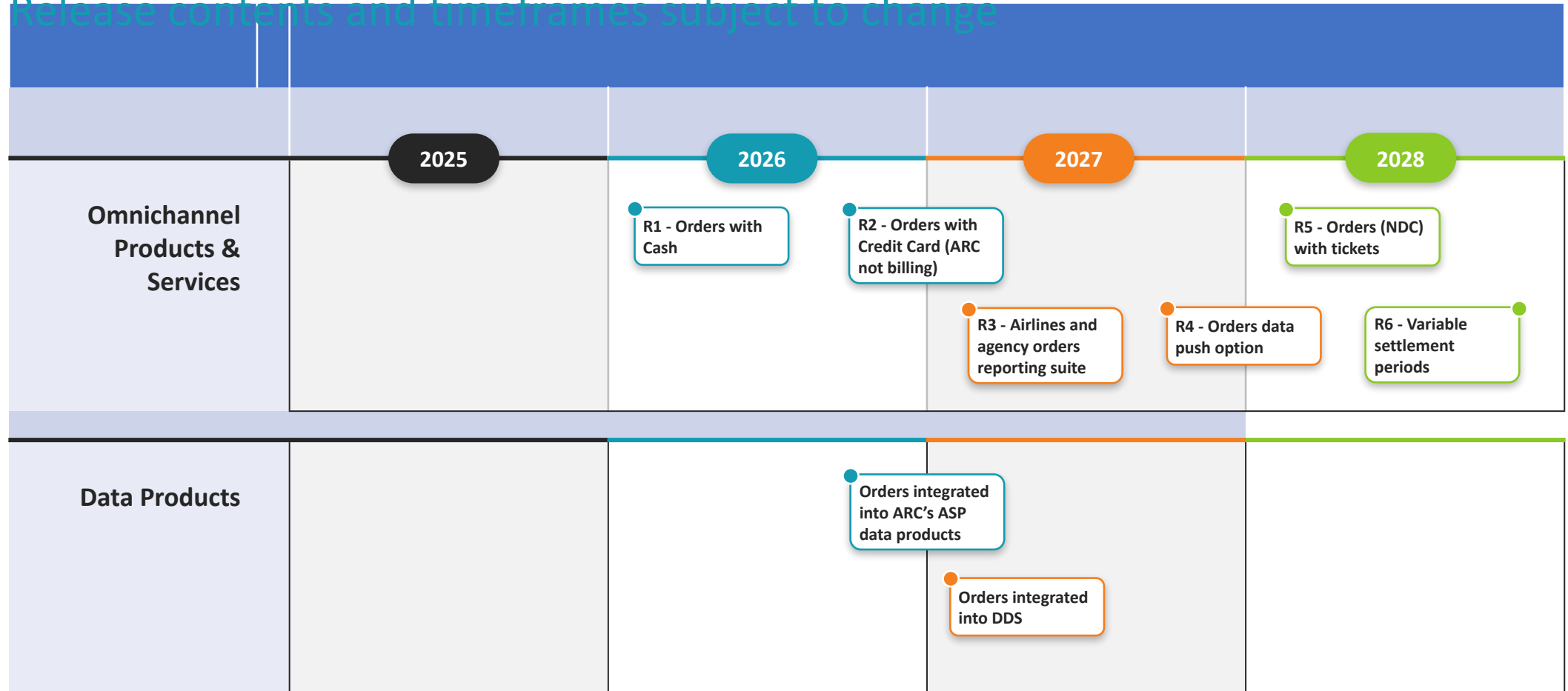
Incorporate orders
data into ARC's
products and
services



Flexible and
comprehensive
data delivery
options

ARC's Orders Roadmap

Release contents and timeframes subject to change



Orders Council Participants

Airlines



AEROMEXICO.



AIR CANADA

AIRFRANCE



American Airlines



ANA

BRITISH AIRWAYS



DELTA



hahnair



jetBlue®



Lufthansa



QANTAS



RIYADH AIR
طيران الرياض

Southwest®



TURKISH
AIRLINES

UNITED



Orders Council Participants

Agencies

ALTOUR

amtrav⁺casto
growth reimagined

CWT



DowntownTravel

AMEX GBT
EgenciaFLIGHT
CENTRE[®]

FR()SCH

Internova
TRAVEL GROUP

NAVAN

priceline[®]

SPOTNANA

Trip.com



Orders Council Participants

Technology Providers

accelya

amadeus

atpco



center



Concur



Datalex

FLYR



Hitit



ibsoftware



Lufthansa Systems

navitaire

an amadeus company

PROS

Sabre

travelfusion



TRAVELPORT

ARC