

Disrupted by Data

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April 11, 2017

CAPA
AIRLINE LEADER SUMMIT
A CEO Gathering 2017



SAP: The World's Largest Provider of Enterprise Application Software

350,000+

Customers in more than
180 countries

85,200+

Employees in 130+
countries

€22.06bn

Total Revenue (IFRS) in
FY2016 (preliminary)

87%

Of Forbes Global 2000 are
SAP customers

45 yrs.

Of history and innovation

100+

Innovation and
development centers


15,000+

SAP partner companies
globally

125 mil.

Subscribers in our cloud
user base



A large commercial airplane, likely a Boeing 747, is shown from a low angle on a runway. The aircraft is white with blue accents on the nose and tail. The background is a clear sky.

87% of the airlines in
the Forbes Global 2000
are SAP customers.

10 of the 10 safest airlines in
the world run SAP solutions.

Source: Airline Ratings, Top ten safest airlines

Our customers fly more
than **1.7 billion**
of the world's passengers.



Key Trends & Opportunities



Mobility & Social
Changing Traveler behaviors



Shifting Mindset
Product-Centric to Service-Centric



GDS
From Distribution to Retail platforms



Big Data
Customer information goldmine, reconciled with Finance

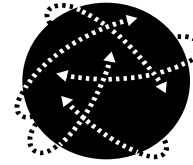


Ancillaries
Untapped value and revenue opportunities



Cloud and Open Standards
Growth and efficiency

Empowered travelers are changing the rules



Digitally connected

79%

Of customers spend at least 50% of total time researching online before making a purchase.



Socially networked

53%

Of customers abandoned an in-store purchase due to negative online sentiment



Better informed

59%

Of customers are willing to try a new brand to get better customer service

Source: SAP performance benchmarking



DIGITAL
TRANSFORMATION
IS DRIVING
FUNDAMENTAL
CHANGE

NETFLIX

A NEW REALITY IS DAWNING

Airlines as Retailers

Predictive Analytics

Artificial and Cognitive Intelligence

Smart Bots and Voice

Virtual & Augmented Reality

Real Time, In Memory Computing

One-Order

NDC




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> 21JUNMIALAX
>
** STANDARD AVAILABILITY - ** LAX LOS ANGELES,
** FOR MORE AVAILABILITY SEE - BUR LAX ONT SNA
** ** 84 TU
1 299 F7 A7 J7 D7 I7 Y7 B7 /MIA LAX 08
H7 K7 M7 L7 W7 V7 G7 S7 N7 Q7 O7
2 464 F7 A7 P7 Y7 B7 H7 K7 /MIA LAX 12
M7 L7 W7 V7 G7 S7 N7 Q7 O7
3 209 F7 A6 P5 Y7 B7 H7 K7 /MIA LAX 13
M7 L7 W7 V7 G7 S7 N7 Q7 O7
4 217 F7 A7 P7 Y7 B7 H7 K7 /MIA LAX 14
M7 L7 W7 V7 G7 S7 N7 Q7 O7
5 : 2854 F2 Y4 B4 M4 E4 U4 H4 /MIA PHL B 06
Q4 V4 W4 S4 T4 L4 K4 G4 A2
: 2908 F2 Y4 B4 M0 E4 U4 H4 /PHL B LAX 1 09
Q4 V0 W0 S0 T0 L0 K0 G0 A2
6 1262 F9 A9 P9 Y9 B9 M9 H9 /MIA PHL 06
Q9 N9 V9 W9 L9 S9 T9 G9 K9 U9 E9 R9
1419 F9 A9 P9 Y9 B9 M9 H9 /PHL LAX 09
Q9 N9 V9 W9 L9 S9 T9 G9 K8 U0 E0 R0
7 : 2854 F2 Y4 B4 M4 E4 U4 H4 /MIA PHL B 06
Q4 V4 W4 S4 T4 L4 K4 G4 A2
: 2968 F2 Y4 B4 M0 E4 U4 H4 /PHL B LAX 1 13

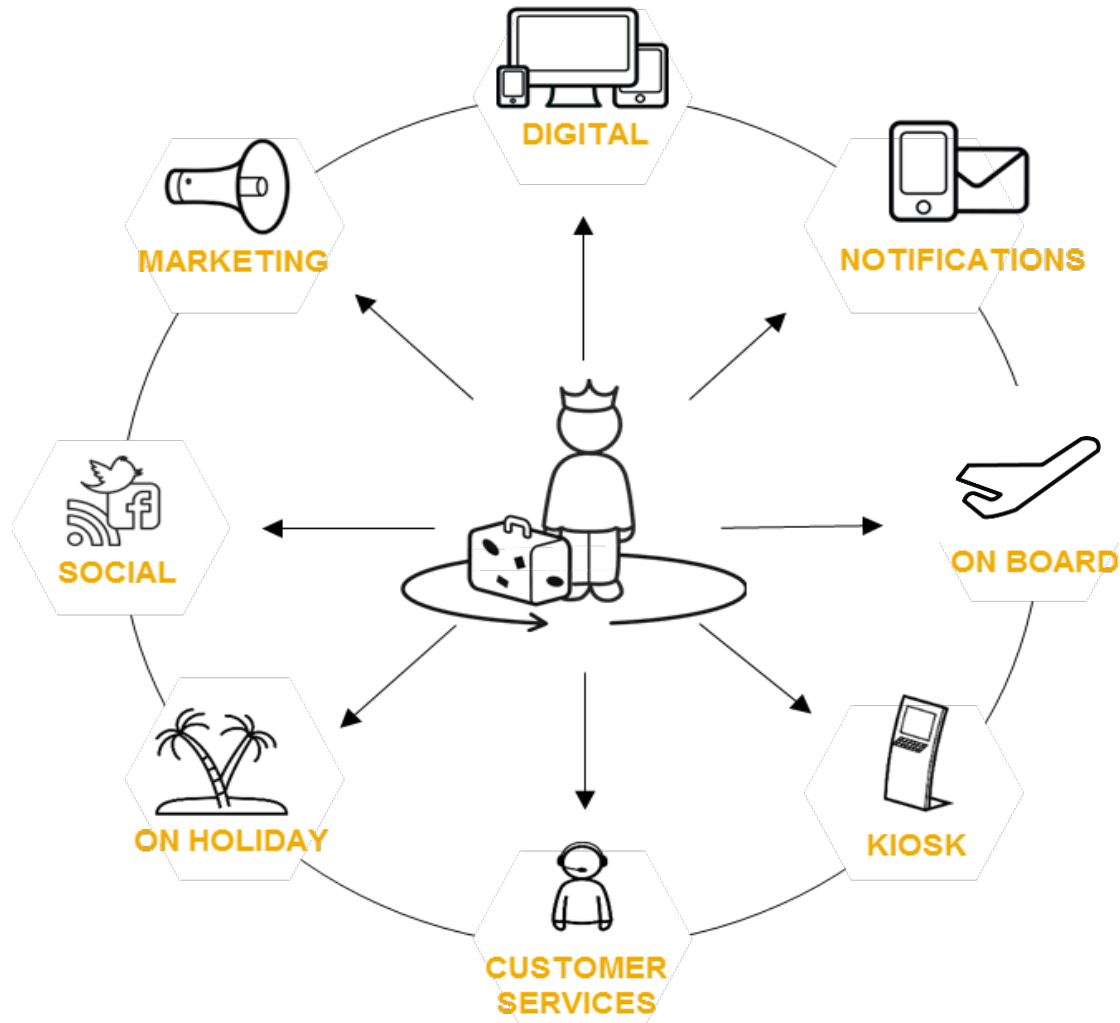
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TRADITIONAL
RESERVATION
SYSTEMS **WERE**
NOT DESIGNED
FOR A DIGITAL
WORLD

TRADITIONAL
AIRLINE
TECHNOLOGY
PLATFORMS ARE
CONTROLLED BY
VENDORS



CONTEXTUAL & RELEVANT CUSTOMER ENGAGEMENT



YOU NEED LIVE DATA & COMMON PROCESSES ACROSS ALL CUSTOMER TOUCHPOINTS ON AN END TO END PLATFORM

AVOID DATA DISRUPTION

OWN THE CUSTOMER JOURNEY

LEVERAGE RETAIL BEST PRACTICES

TIE TOGETHER THE FRONT, MIDDLE, AND BACK OFFICE

TURN DATA **INSIGHTS INTO ACTION**

TRANSFORM INTO A **DIGITAL** AIRLINE



Thank you

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