



# Navigating Air Content Distribution

A practical white paper for company travel managers and procurement professionals

Airlines are adopting NDC and direct connect to reduce distribution costs, gain greater control over offers and pricing, and strengthen traveller relationships, but maturity still varies widely across airlines. Most are relatively strong in shopping and booking, while many continue to lag in servicing, disruption management, payment integration, ancillaries, and data connectivity.

For corporate travel programmes, the challenge is not simply accessing more content, but ensuring that content can be searched, compared, booked, serviced, reported, and used for traveller tracking and duty of care with enough consistency to support a managed programme. Leisure travel can succeed with search, booking, ancillaries, and payment, while business travel also requires policy controls, changes and cancellations, reporting, risk visibility, and end-to-end support.

## Strategy Alignment Is the Real Challenge

Airlines aim to increase control over offers, boost ancillary revenue, deepen direct customer engagement, and lower distribution costs. Companies and TMCs, by contrast, prioritise comparison shopping, programme visibility, consistent servicing, negotiated content, robust data capture, and traveller safety controls. This divergence often leads to misaligned strategies—especially around who is considered the “customer”: airlines typically see the passenger as the end consumer, while organisations view themselves as the customer funding the travel. Until this distinction is reconciled, full alignment between airline and corporate travel strategies will remain difficult.

## Understanding NDC and Direct Connect as API Tools, Not End States

NDC is IATA’s XML messaging standard for delivering richer airline content—fares, ancillaries, personalised offers—via APIs, while “direct connect” describes any direct API link between a seller (TMC, OBT, corporate tool) and an airline, using NDC, proprietary APIs, or other protocols. In both cases, capability can range from basic shopping and booking to deeper integration across ancillaries, servicing, disruption management, payments, and data connectivity. The value of these channels depends on how far each airline has developed its APIs and how comprehensively the TMC and technology stack have integrated them.

## End-to-End Capability Matters More Than Source Access

Business travel programmes should evaluate each content source across the full workflow: search, shop, book, ancillaries, servicing, disruption management, data capture, and duty of care. IATA's roadmap highlights servicing, involuntary changes, notifications, payment options, ancillaries, and order management as essential for scale, yet servicing remains a core capability not yet widely implemented across API channels.

## Removing Content Creates Downstream Friction

When airlines withdraw content, add surcharges, or restrict access through new commercial arrangements in traditional channels, companies lose transparent comparison shopping and face greater complexity, manual work, and weaker continuity across servicing and reporting. Without comprehensive fare and service transparency, option evaluation becomes more difficult, traveller trust can erode when fares appear outside company booking channels, and traveller satisfaction suffers through booking friction and inconsistent disruption support.



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## Servicing Remains the Hardest Gap

The industry lacks a coherent servicing model that works consistently across all airlines and channels. Participants in IATA's NDC@Scale programme have highlighted persistent challenges including inconsistent workflow execution, performance limitations, integration difficulties, and the ongoing transition from legacy systems. Travel managers should partner with their TMCs and tech providers to identify and prioritise airline servicing partners that deliver consistency across the full journey.

## Maturity Differs Across Every Participant

Maturity levels vary widely among airlines, travel technology providers, OBTs, TMCs, and buyer organisations—not just in content richness but also in operational reliability and integration depth. These differences create uneven experiences where one airline may offer seamless booking but fragmented servicing, while another provides stronger disruption support but limited content options. Travel managers should recognise that airlines differ significantly in content accessibility, servicing capabilities, and disruption management approaches throughout this prolonged period of channel coexistence and transition.

## Technology Landscape

The technology landscape now spans traditional GDS connectivity, NDC APIs, airline direct connects, third-party aggregators, OBT integrations, TMC workflows, mid-office and back-office systems, profile tools, reporting platforms, and traveller tracking solutions. In practice, this means a booking may be easy to shop but difficult to change, simple to ticket but hard to report, or visible in one servicing layer but not another, depending on the airline-channel combination. Companies therefore need to define their own strategy by identifying where they require broad content access, comprehensive servicing, non-negotiable workflows, essential data capture, effective traveller tracking, and acceptable exceptions. The right distribution strategy is not “all NDC” or “all direct connect”, but the mix of channels and partners that best balances savings, content access, traveller experience, service resilience, and risk management.

## What Good Looks Like

The ideal scenario is deep integration, where any flight change triggers consistent updates across the traveller, TMC, company, online tools, profile and reporting systems, and duty-of-care workflows. Achieving this depends on synchronised offer, order, servicing, notification, and data architectures across all parties. Current market conditions remain far from this state, as airlines continue to pursue different strategies and technology roadmaps.

## Evolving Air Content Distribution

Air content distribution is not moving towards a single, unified approach. Today, the market operates in a multi-channel environment shaped by uneven maturity, distinct airline strategies, and ongoing trade-offs between broad content access and consistent operational performance. In the mid-term, multiple channels are likely to coexist while servicing capabilities gradually improve. Longer term, deeper integration may emerge, but only if airlines align more closely on standards, servicing priorities, and data requirements.



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## Strategic Considerations for Business Travel Programmes

The success of a business travel programme depends on understanding these evolving dynamics and making deliberate trade-offs. Travel managers must develop strategies that balance airline content opportunities with traveller expectations, reliable servicing, accurate and complete data, disruption readiness, and duty of care obligations.



## Ask TravOnyx

TravOnyx helps travel managers and procurement teams understand how NDC, direct connect, and traditional content impact their programmes—supporting the development of a balanced channel strategy while identifying risks to traveller experience, servicing, disruption response, and data consistency. In a market that is still maturing, the priority is not chasing every new connection but building a practical content strategy that aligns with programme goals and traveller needs



For enquiries or to discuss how TravOnyx can support your travel programme, please email [consulting@travonyx.com.au](mailto:consulting@travonyx.com.au) or complete the [TravOnyx Consulting Contact form](#)