

AIRLINE DISTRIBUTION UPDATES

Weeks 7 & 8, 2024

This edition contains news on:

- American Airlines
- Korean Air
- Southwest Airlines
- Ryanair
- TAP Air Portugal
- Sabre
- Accelya
- Navan
- ARC



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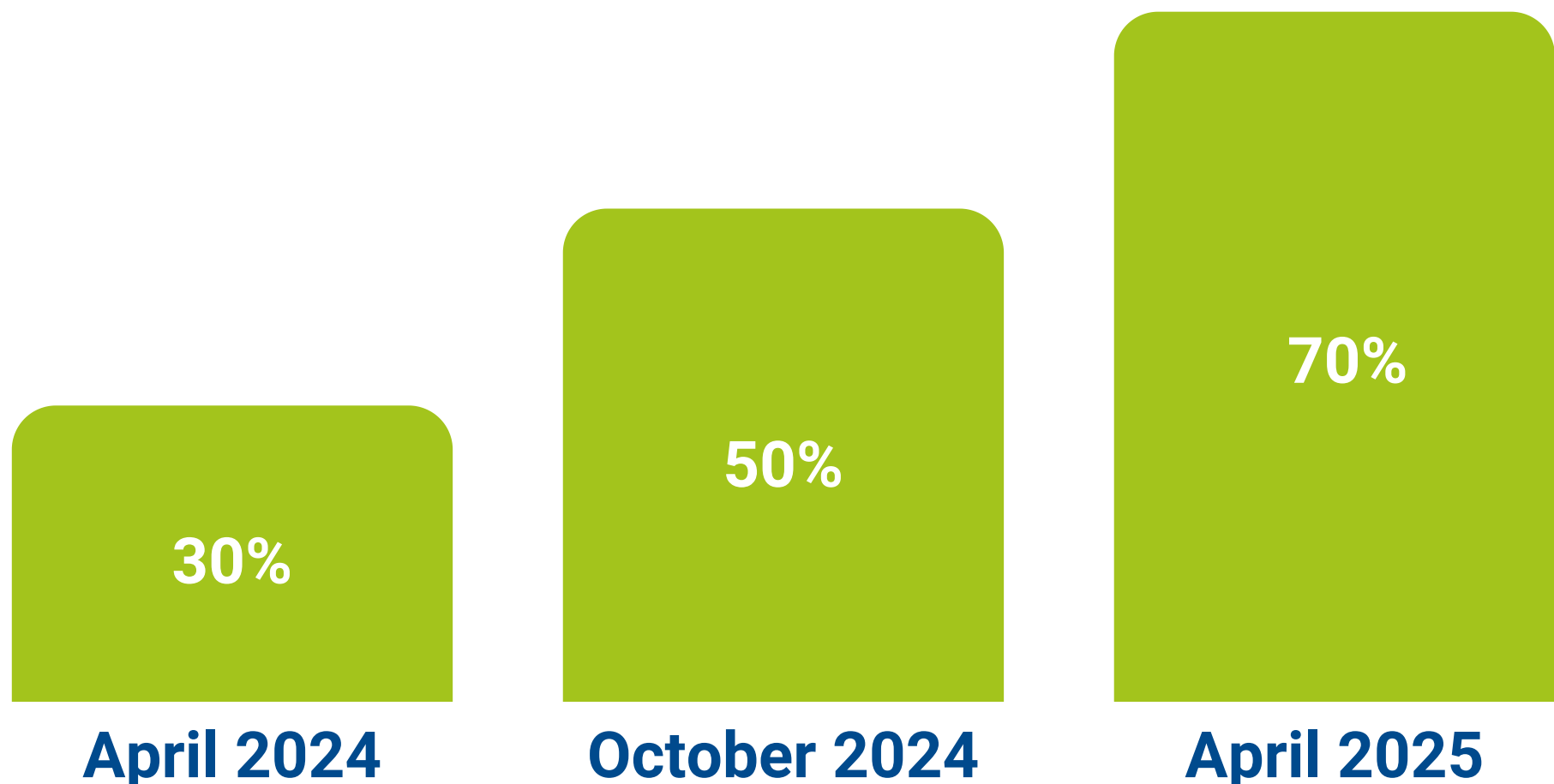
American Airlines introduces “preferred agent” concept

American Airlines (AA) has created “preferred agents”.

To be “preferred” an agent must:

1. Have an agency incentive agreement
2. Meet AA’s display requirements
3. Meet NDC adoption targets

Minimum NDC adoption requirements







American Airlines restricts miles to direct channel and preferred agent bookings

AA announced there are changes to where customers can earn AAdvantage miles and loyalty points.

From 1st May 2024, travelers with no AA relationship* will earn miles only on bookings made via AA's direct channels, partner airlines, and preferred agents.

Who will earn miles?

	No AA Relationship	AA Relationship*
Direct channels and Preferred agents		
Non-Preferred agents		

*AAdvantage Business member or contracted corporate

Accelya signs Korean Air for retail transformation

Korean Air (KE) has signed for Accelya's FLX product suite. KE is one of the few remaining Tier 1 full-service airlines (25+ mil pax.) to not have NDC.

The deal includes NDC and merchandising. This is Accelya's first sale of its FLX product suite in Asia.

Sabre's GDS revenue up despite stable market share in Q4 2023

Sabre reported a stable GDS market share of 33.2%. This is a 0.2 percentage point increase year-on-year (YoY). Distribution revenue grew by 14% with an 11% increase noted in the average booking fee.

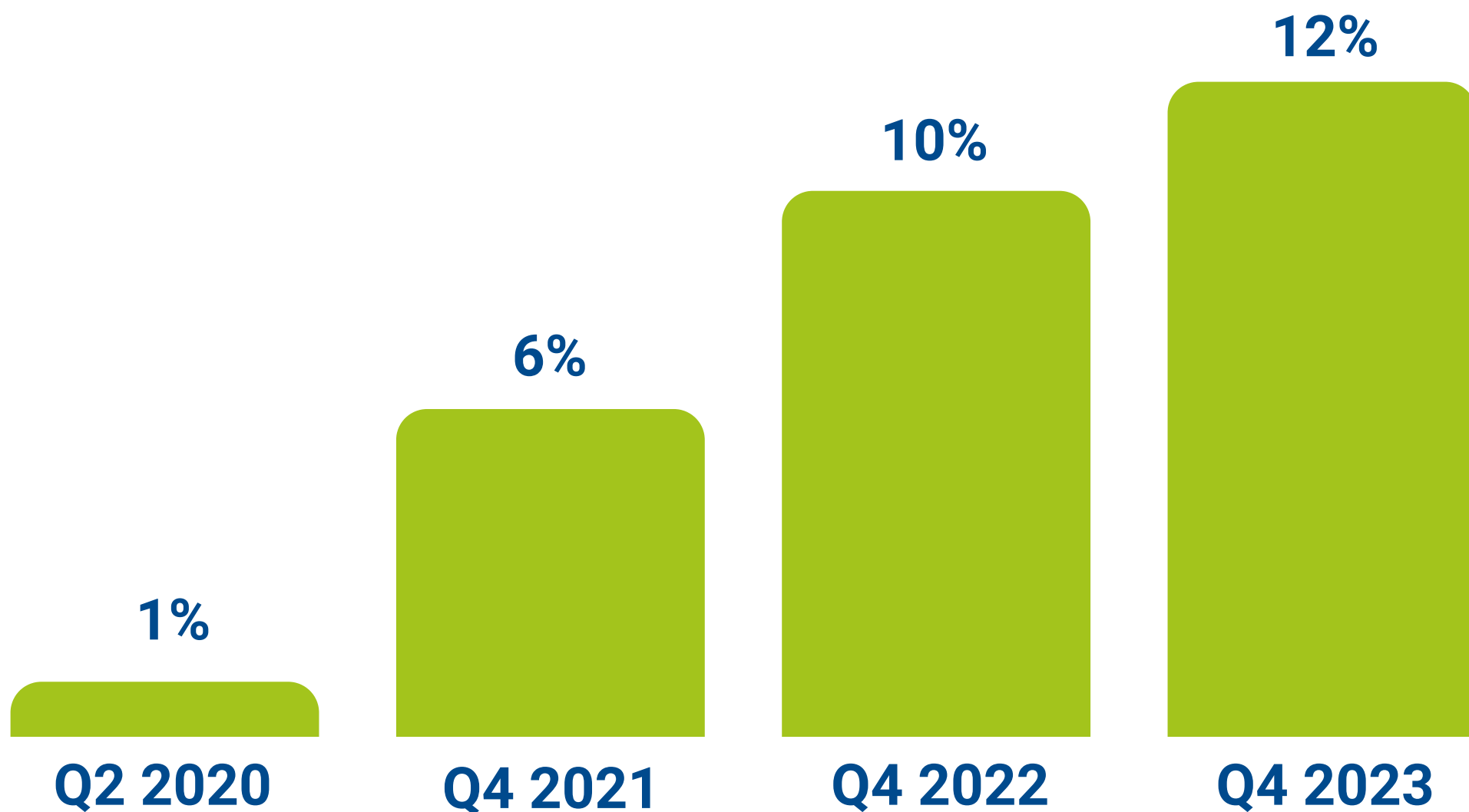
Distribution insights from the financial results

	Q4'23 results	Change vs Q4'22
Distribution Revenue	\$476m	+14%
Avg. Booking Fee	\$6.09	+11%
GDS Market Share	33.2%	+0.2 pp

Southwest gains market share in US domestic corporate

Since joining the GDSs in 2020, Southwest has increased its US domestic corporate market share to 12%.

Southwest's US domestic corporate bookings (via ARC)



Navan brings back Ryanair content

Navan has reinstated Ryanair's basic fares. More fare brands are expected soon.

There is no commercial agreement between the two companies to sell Ryanair's flights.

Selected highlights of Ryanair's corporate partnerships

November 2023

Ryanair content **turns off** **Travelfusion,** **Navan's content provider.**

January 2024

Ryanair **partners with Concur Travel** to implement a direct connection

February 2024

Navan reinstates Ryanair basic fares, despite Ryanair content being **still disabled on Travelfusion**

Focus Travel and AirGateway partner

Focus Travel and AirGateway have entered into a partnership. Focus Travel is the largest chain of SME TMCs in the UK. AirGateway is a content aggregator.

Focus Travel members will have access to NDC for 27+ airlines.

Travelport extends strategic partnership with eDreams ODIGEO

Travelport and eDreams ODIGEO have extended their partnership to co-develop an NDC platform.

eDreams ODIGEO, one of the world's largest OTA groups, owns brands like eDreams and Opodo.

TAP Air Portugal integrates NDC with ARC

TAP Air Portugal has integrated NDC with ARC Direct Connect. This will allow TAP to establish NDC in the US market.

TAP flies to six US cities. Its hub in Lisbon is geographically well-positioned for US-to-Europe traffic.

Milan court rules in Ryanair's favor over OTAs

Last week, a Milan appeals court favored Ryanair in a lawsuit against OTAs, ruling that its exclusive online distribution model is not an abuse of dominance.

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Singapore 2024 Airline Distribution and Retailing Masterclass

- GDS: pushing the limits and overcoming the GDS vs. NDC dichotomy through multi-channel models
- Payments: a crucial component of a holistic commercial strategy
- NDC: making a difference with differentiated content and functional maturity
- Offer and Order: from concept to design

Register Now!

**27th February 2024, 13:00 to 17:00 -
the day before the Aviation Festival Asia 2024**