

# ***AIRLINE DISTRIBUTION AND RETAILING UPDATES***

***Weeks 43 & 44, 2024***

**This edition contains news on:**

- American Airlines
- BeOnd Airlines
- British Airways
- Delta Air Lines
- Frontier Airlines
- Iberia
- Ryanair
- TAP Air Portugal
- Serko
- US DOT & DOJ

# U.S. DOT airline refund rule goes into effect

In April, the U.S. Department of Transport (DOT) proposed a rule stating that merchants of record for flight bookings must give cash (not voucher) refunds to travelers in disruption scenarios. The rule has now come into effect starting October 28.

The disruption scenarios resulting in refunds include:

- Cancellation or significant change to booked flight(s)
- Delay in baggage delivery
- Failure to deliver booked ancillaries

Refunds are due within 7 business days for card purchases and 20 days for other payment methods.

Previously, refund policies and conditions differed from airline to airline.

# U.S. DOT & DOJ airline competition probe

The U.S. Department of Transportation (DOT) and Department of Justice (DOJ) have launched a public inquiry into the state of competition in air travel, inviting comments from the public until December 23 on categories like airline consolidation and competition, air transportation sales channels, and airline pricing.

The probe also focuses on competition among travel agencies, among GDS platforms, between travel agencies and GDS, and GDSs and other distribution channels, specifically inquiring about preferential treatment, barriers, and exclusionary practices.

The American Society of Travel Advisors (ASTA) welcomed the inquiry, while Airlines for America (A4A) and the U.S. Travel Association (USTA) labelled it “politically motivated”.

# Delta Air Lines and Amadeus sign NDC deal

Amadeus and Delta's expanded distribution contract grants access to NDC and EDIFACT content through the Amadeus Travel Platform. The timeline for distributing Delta's NDC content is not public yet.

In August, Delta announced the renewal of full-content deals with all three major GDSs which include NDC, no surcharges, and value-based pricing.

## Delta's GDS contract renewals/ expansions

	Sabre	Travelport	Amadeus
<b>GDS contracts including value-based pricing</b>	May 2021	August 2021	November 2021
<b>GDS contracts including access to NDC content</b>	August 2024	September 2024	October 2024

# Accelya launches its new platform, FLX ONE

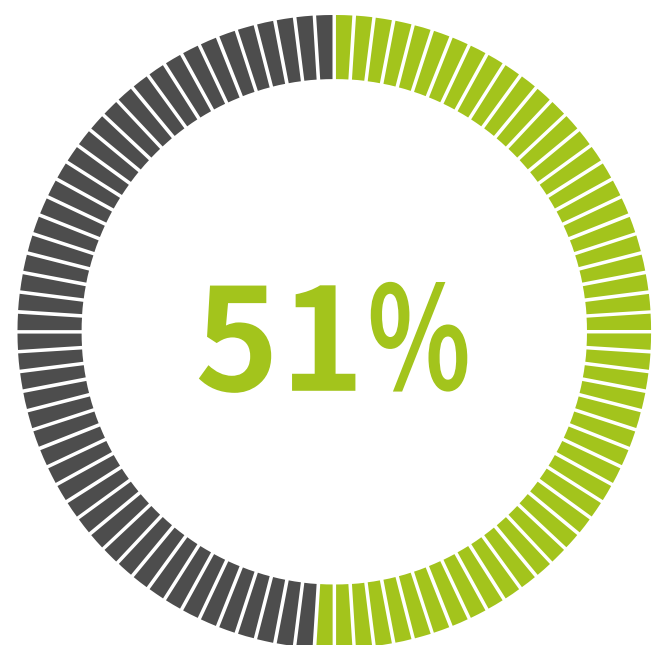
On October 30, Accelya announced the launch of their new platform, FLX ONE. The API-driven platform, built in AWS, aims to support the full Offer-Order-Settle-Delivery set of capabilities.

Accelya announced a partnership with SITA for airport customer experiences and introduced DXC Technology as their preferred integrator. The DXC partnership will allow Accelya's new platform, FLX ONE, to integrate with DXC's departure control systems.

Additionally, Air Transat, a Canadian carrier has signed a multi-year deal for Accelya's FLX platform.

# Navan integrates Iberia's NDC content

Navan has announced its integration of Iberia's NDC content, which went live in September. The integration, enabled via a direct connection, includes continuous pricing. Navan states Iberia has had the "steepest NDC adoption increase" out of all 16 connected airlines. Navan also has an NDC connection with fellow IAG airline, British Airways.



Iberia flights  
booked on Navan  
via NDC

# Ryanair/ SAP Concur direct connect goes live

In January, Ryanair entered into a direct connect agreement with SAP Concur. The integration is now live. Ryanair's entire fare range and ancillaries will be bookable via Concur Travel.

The carrier also has an upcoming integration with Concur TripLink, which is expected to go live in H1 2025.

## Selected highlights of Ryanair's partnerships



# **British Airways to terminate most private channel agreements**

In 2017, British Airways (BA) entered private channel agreements with some of the biggest TMCs as a 'temporary solution' to ease the transition to NDC. The private channel agreements allowed members to bypass BA's 15 EUR per sector EDIFACT booking surcharge.

While most private channel agreements will terminate on December 31, some agreements, like with Amex GBT, will continue in 2025.



# American Airlines reports on recovery status

American Airlines (AA) is working to recover from its distribution strategy reversal. The airline is renegotiating agreements with agencies and corporate partners, aiming to fully restore revenue from indirect channels by the end of 2025, after seeing a 10% drop in the share of indirect bookings in Q3 2024, YoY.

In February, AA announced the restriction of business loyalty rewards to direct channels and “preferred agents”. This policy was reversed in May. AA has also reinstated content that was removed from EDIFACT in 2023.

***2024 estimated revenue loss due to commercial strategy changes***

**1.5 Billion USD\***

*\*Source: Robert Isom, CEO, American Airlines; via AA second quarter results call*

# TAP Air Portugal and Sabre sign NDC deal

Sabre and TAP Air Portugal have signed a renewed multi-year distribution contract to continue distribution via EDIFACT and access to NDC content. Sabre-connected agents can already start requesting activation access to the carriers NDC offers.

## BeOnd Airlines enters Sabre GDS

BeOnd Airlines, a Maldivian premium leisure carrier has partnered with Sabre to further grow its content distribution in the traditional GDS environment.

**BeOnd's 5-year  
expansion aims**



**60**

destinations



**32**

aircrafts

# Frontier Airlines goes dark on Sabre

American ULCC, Frontier Airlines, has “discontinued its participation in the Sabre GDS, effective October 01”. Agents connected via Amadeus and Travelport will still have access to select Frontier content.

Frontier is currently shifting its distribution strategy, with a planned NDC ramp-up, launch of a new GDS-only corporate bundled fare product (BizFare), and three new fare bundles with no change or cancelation fee.

## Go-darks on Sabre

<p><b>Finnair</b> 2019</p>	<p><b>Emirates</b> 2021</p>	<p><b>Turkish Airlines</b> 2024</p>	<p><b>Frontier Airlines</b> 2024</p>
<p><b>Reinstated after 7 months</b></p>	<p><b>Reinstated after 3 months</b></p>		

*\*intra-European routes not included in the removal of Finnair content from Sabre*

# Serko to acquire Sabre's GetThere OBT

Serko, a New-Zealand based travel management and expense technology company, is set to acquire Sabre's online booking solution - GetThere. The deal is expected to close in early 2025. This acquisition also kicks off a five-year innovation partnership between Serko and Sabre and positions Serko as the second-largest North American corporate booking platform provider by volume after Concur Travel.

Serko will continue to operate its current booking tool, Zeno, as a separate brand. Zeno is connected to Sabre's GDS NDC content.

**Serko will acquire Sabre's online booking tool - GetThere for**

**12 Million USD**

# Sabre reports Q3 2024 financial results

Sabre reported an increased GDS market share to 34.7%. Distribution revenue grew by 5% with a 3% increase in air bookings.

## Distribution insights from Q3'24 financial results

	Q3'24 results	Change vs Q3'23
Distribution revenue	\$551.0m	+5%
Air bookings	\$78.6m	+3%
Average booking fee	\$5.94	+1%

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- Offer-Order transformation approach



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