

AIRLINE DISTRIBUTION AND RETAILING UPDATES

Weeks 45 & 46, 2024

This edition contains news on:

- All Nippon Airways
- Air Canada
- Air France-KLM
- Air India
- Breeze Airways
- British Airways
- Cathay Pacific
- Emirates
- Iberia
- TAP Air Portugal

Air Canada launches continuous pricing

Air Canada has started implementing continuous pricing in North American markets, with plans to expand globally by early 2025.

The carrier also announced a new small business program, which allows only NDC bookings.

Air Canada's NDC adoption strategy



\$2 per-flight agency incentive



'Risk-free refund period' increased to 48 hours



Continuous pricing launched on all fares except for the highest and lowest booking class in each cabin



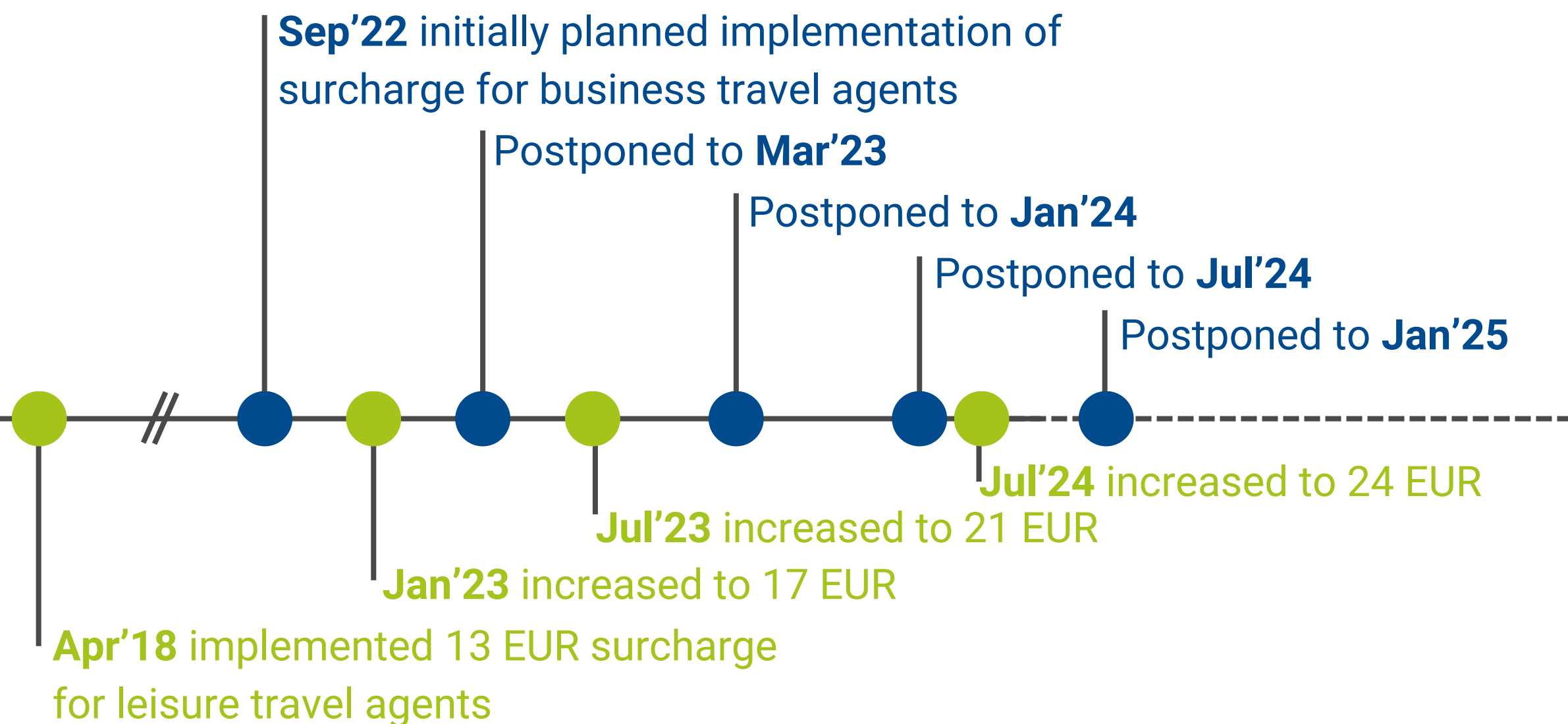
EDIFACT surcharge on each cabin's lowest fare classes



Content differentiation - domestic basic fares, discounted ancillaries, and promotional offers only available via NDC

Air France-KLM update on GDS surcharge

AF-KL will implement its GDS surcharge for business travel agencies on 01 January 2025 but at a reduced amount. Business travel agencies will pay a 3 EUR GDS EDIFACT surcharge from 01 January to June 2025. From July, business travel agencies are expected to pay the existing 24 EUR surcharge, the same as leisure agents.



Amadeus and Cathay Pacific expand NDC

Hong Kong-based carrier Cathay Pacific (CX) deepens its IT & NDC relationship with Amadeus, including the continuation of the phased rollout of CX's NDC-sourced content to Amadeus-connected travel sellers.

CX is a customer of Amadeus' Altéa NDC (circa 2019) and Altéa Passenger Service System (circa 2012).

Timeline of Amadeus and CX's distribution relationship



Amadeus announces Navitaire Stratos

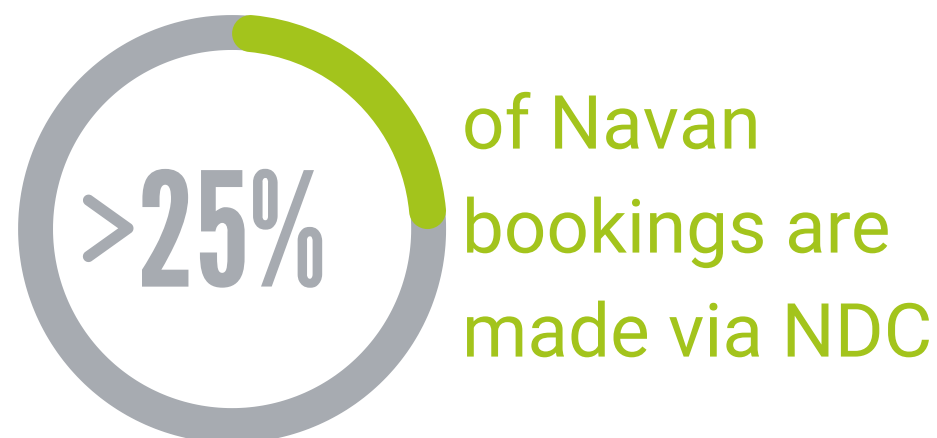
On November 05, Amadeus announced a new version of the Navitaire platform, Stratos. The platform is designed for LCCs and Hybrid carriers to enter the modern retailing world. This includes supporting the NDC standards, Offer/Order concepts, and Dynamic Offers.

It is unclear if existing Navitaire customers will benefit from Navitaire Stratos immediately or if the two systems will co-exist, requiring a migration phase.

Amadeus has not announced a go-live date or any airline partners of Navitaire's Stratos yet.

Navan integrates Breeze Airways NDC content

Navan has enabled Breeze Airways' NDC content via a direct connection. Following its recent integrations with Iberia and Breeze, Navan now has NDC connections with 17 airlines.



Navan is the second TMC Breeze has integrated with, and the connection includes access to an exclusive BreezeCorp bundle. Launched in 2021, Breeze is a US low-cost carrier focused on underserved US markets.

Breeze's TMC connections

AmTrav
August 2024

Navan
November 2024

Air India launches NDC on Sabre

Air India (AI) has launched NDC via Sabre, making Sabre the first GDS to distribute AI's NDC content. In October 2023, AI signed renewed distribution contracts with all three major GDSs, including access to NDC content. The carrier deployed NDC 21.3 in September this year.

AI has also accelerated its NDC launch with Travelport, now expected to be completed in Q4 2024.

BA & IB NDC on Concur's new platform

NDC content from British Airways (BA) and Iberia (IB) will be made available on Concur's new booking platform via GDS connection(s) by the end of the year. Bookings made on the platform will avoid the GDS EDIFACT surcharge.

Travelport expands Emirates NDC availability

Emirates' NDC content is now available to North American agencies on Travelport. Travelport is the first GDS to distribute the carrier's NDC content.

Sabre is set to offer Emirates' NDC content soon, with implementation completed and final testing underway.

Travelport's Emirates NDC geographical rollout



Travelport signs NDC deals

All Nippon Airways (ANA): ANA has signed a 'multi-source content distribution agreement' allowing Travelport to distribute ANA's NDC content. Travelport is the first GDS to sign an agreement for the carrier's NDC content. ANA's NDC content is planned to be available on Travelport+ by mid-2025.

TAP Air Portugal: Travelport and TAP Air Portugal have signed an expanded distribution contract. This includes access to NDC content. The final timeline for distributing TAP's NDC content on Travelport+ has not yet been specified. TAP signed a similar deal with Sabre in October.

Amadeus reports Q3 2024 financial results

Amadeus' average booking fees and air bookings grew by 4% YoY. As of Q3 2024, Amadeus is live with NDC with 29 airlines on the Amadeus Travel Platform. Amadeus' President of Travel has stated the GDS is in a "substitution" phase, shifting EDIFACT bookings to NDC.

Insights from the Q3'24 financial results

	Q3'24 results	Change vs Q3'23
Distribution revenue	\$724.4m	+9%
Air bookings	117.5m	+4%
Average booking fee	\$6.16	+4%

Distribution updates on Amex GBT

- In Q3 2024, **Amex GBT** saw stronger YoY growth among **large corporations (+8%)** than **SMEs (+2%)**. Amex, in the past, has remained optimistic about long-term SME growth, as 66% of the SME market is still unmanaged.
- In March 2024, **Amex GBT** announced a **\$570M acquisition of CWT**. In June, the UK Competition and Markets Authority (CMA) began investigating potential monopolistic effects of the merger. The **CMA has now issued a provisional report suggesting the merger reduces competition in the global TMC market**. A final decision is due by January 26, 2025.
- Amex began its NDC rollout pilots with AF-KL in 2024 in a phased approach with selective customers. **The NDC rollout has now expanded to a wider set of customers.**

More industry distribution news

Hawaiian Airlines has connected directly with TMC **AmTrav**, giving users access to interisland fares unavailable via EDIFACT. This marks AmTrav's seventh direct airline connection.

Bhutan Airlines and Lufthansa Group have partnered with **FinMont**, a payments platform founded by Hahn Air's creators, integrating B2C and B2B payments.

The **American Society of Travel Advisors (ASTA)** chimed in on **Turkish Airlines'** (TK) distribution strategy requesting greater transparency over TK's plans.

Agoda and Amadeus are partnering to enhance the OBT's flight offerings through the Amadeus Travel Platform. The collaboration will launch in Thailand and then expand across Asia.

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- Structured, flexible and customizable, modular approach to distribution strategy solutioning
- Audits that offer airlines solutions to specific problems in GDS and NDC distribution
- Offer-Order transformation approach



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