

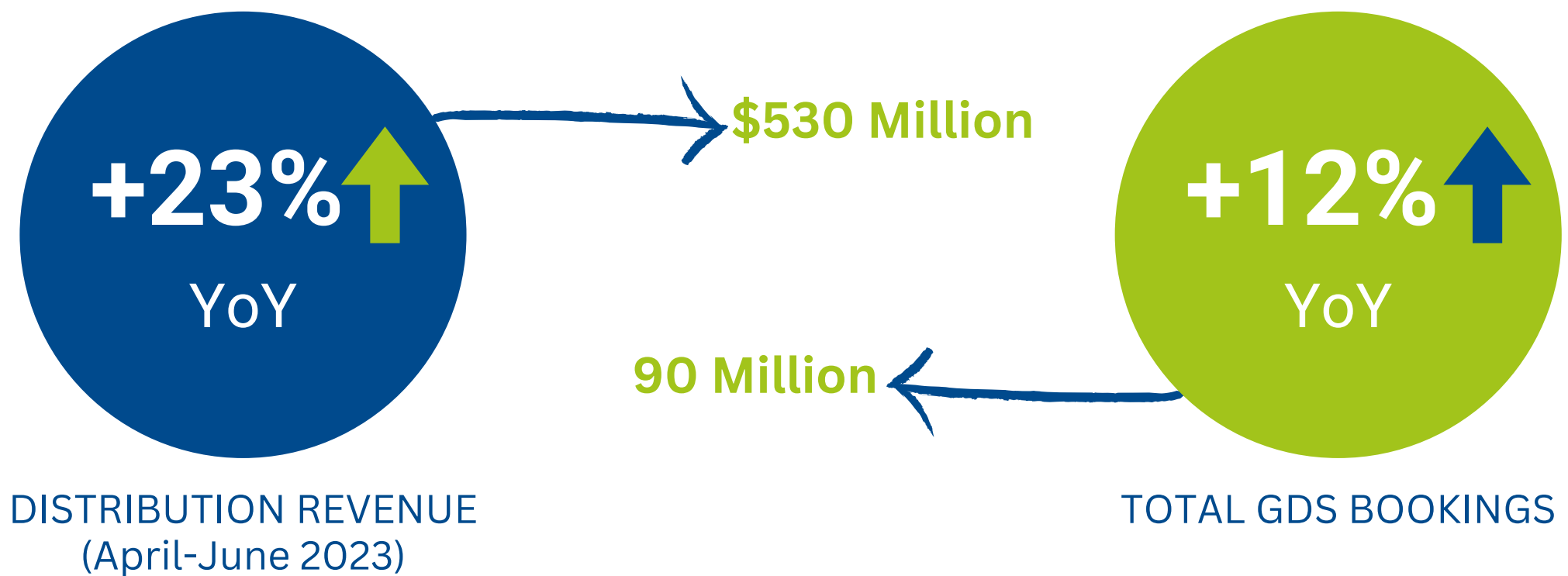
# ***DISTRIBUTION UPDATES***

***Week 31 & 32, 2023***






# Sabre cuts workforce, amidst bounce back from pandemic results

Sabre Corporation has completed its previously announced workforce reduction, resulting in a decrease of approximately 10% of its global workforce. Meanwhile, Sabre's distribution revenue has grown faster than its number of GDS bookings, driven by a 10% increase in the average booking fee to \$5.87.



# Sabre is posting improved results, but is still not back to pre-pandemic levels

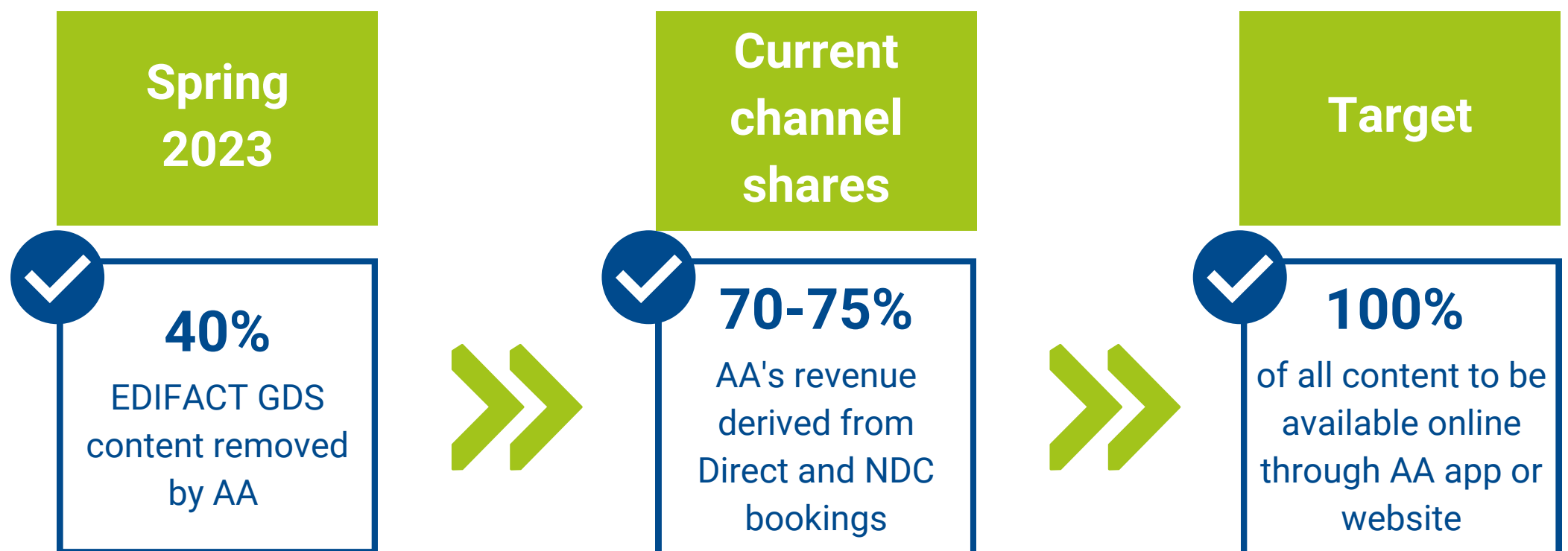
	2023	2019
Air Bookings	 <b>10% YoY</b> 77 Million	<b>125 Million</b>
GDS Air Booking Market Share	 <b>1.4pp YoY</b> 33.7 pp	<b>38 pp</b>
Total Revenue	 <b>12% YoY</b> \$738 Million	<b>\$1 Billion</b>

\*pp: Percentage Points



# American Airlines aims to further increase its NDC adoption

American Airlines aims to further accelerate the adoption of NDC, after witnessing better than expected results from the removal of 40% of content from legacy EDIFACT in April 2023.



# **United Airlines to remove Basic Economy fares from EDIFACT**

United Airlines plans to discontinue offering Basic Economy fares through the EDIFACT distribution channel. In an attempt to sell in a more economical way, United is joining American Airlines in the US, which has already fully removed its lower-rated fares from EDIFACT.

## **Similar strategy carried out by European carriers**

**Air France-KLM**

**Finnair**

**Selection of carriers  
removing low rate  
fares from EDIFACT**

**Lufthansa Group**

**Scandinavian  
Airlines**



# **United makes available its NDC content via Travelport with renewed multi-year agreement**

United Airlines is continuing its rollout of NDC content on Travelport's NDC platform. This goes hand-in-hand with United's announcement to remove its Basic Economy fares from EDIFACT. With Travelport's NDC integration, United now hosts its NDC content across all three major GDSs.



# Chilean tribunal reverses ban on key components of LATAM's distribution strategy

The Chilean Tribunal de Defensa de la Libre Competencia has unanimously reversed its temporary ban on LATAM Airlines' GDS surcharge and content differentiation, following a request by the Asociación Chilena de empresas de Turismo, which viewed key components of LATAM's distribution strategy as market power abuse.

**5-0**

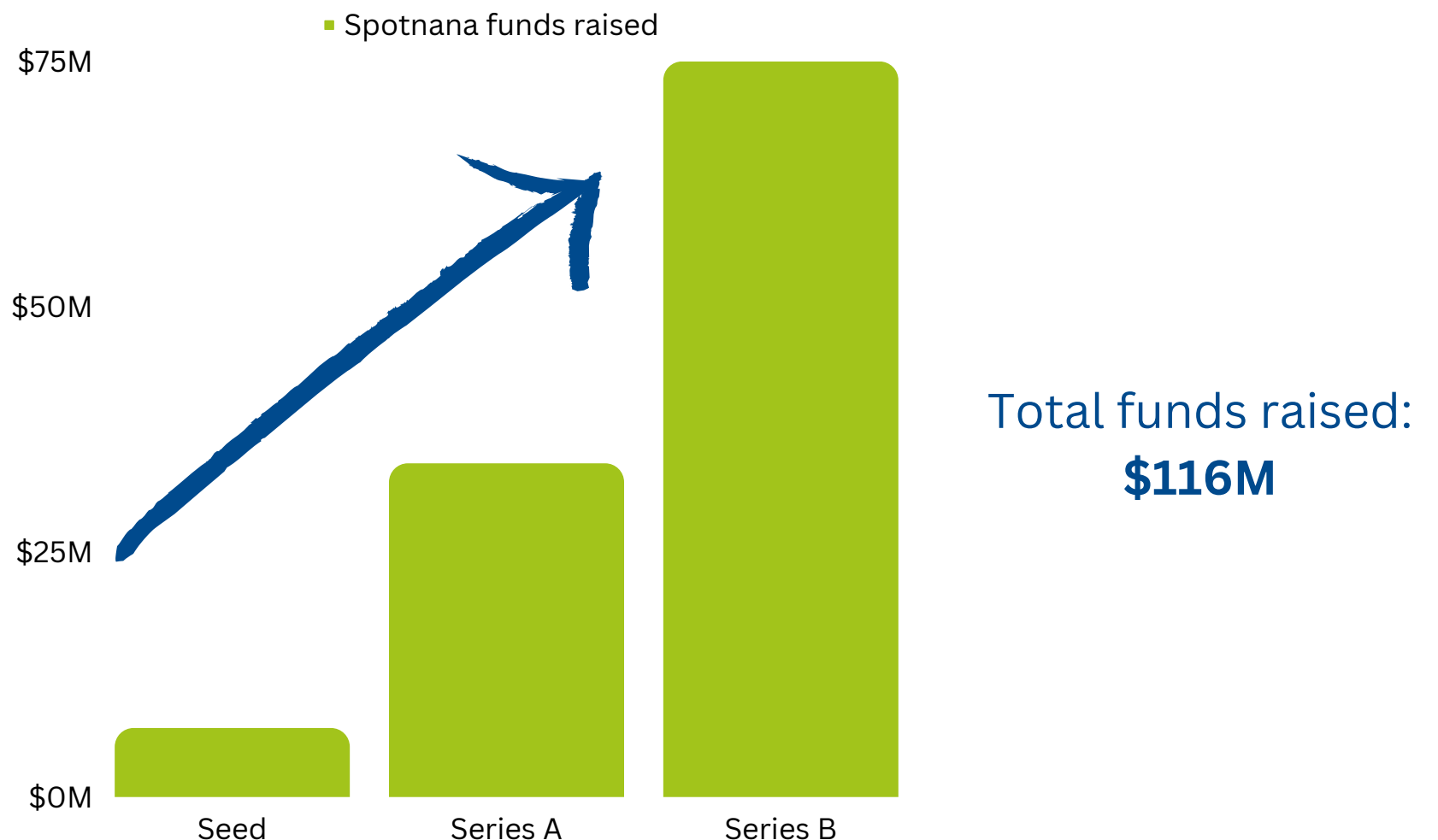
**Unanimous decision for LATAM**



# Spotnana and Lufthansa announce an NDC integration partnership

Spotnana adds Lufthansa to its list of NDC-connected airlines. Recently Spotnana also added American Airlines and United. Interesting to note: Lufthansa is also an investor in Spotnana's recent Series B funding of over \$75M.

## Swift investing growth noted at Spotnana





# Spotnana and Qantas to partner on Qantas Business Rewards platform

The Australian carrier partners with Spotnana in redeveloping its Qantas Business Rewards (QBR) platform. The platform targets small and medium size businesses. The redeveloped platform enables the capability to directly book flights, hotels, and rental cars.

**QBR hosts**

**450,000**

**Australian businesses as members**

