

From: "Perry, Grant" <Grant.Perry@sabre.com>
Sent: Tue, 30 Jan 2018 11:40:53 -0600 (CST)
To: "Milton, Steve" <Steve.Milton@sabre.com>
Cc: "Jones, Wade" <Wade.Jones@sabre.com>; "Henry, Katharine" <Katharine.Henry@sabre.com>; "Sparks, Michelle" <Michelle.Sparks@sabre.com>
Subject: Travel Network Board Deck Submission
Attachments: Travel Network Board Deck_vf (2,6).pptx

Steve,

Attached is our Travel Network board submission. Please let me know if you have any questions or the formatting copies incorrectly.

Sincerely,

GRANT PERRY | Principal, Strategy & Operations | Sabre | m: [REDACTED] e: grant.perry@sabre.com



SABR-000609940






Sabre

Travel Network Board Update

Wade Jones
President
Travel Network
02/06/2018

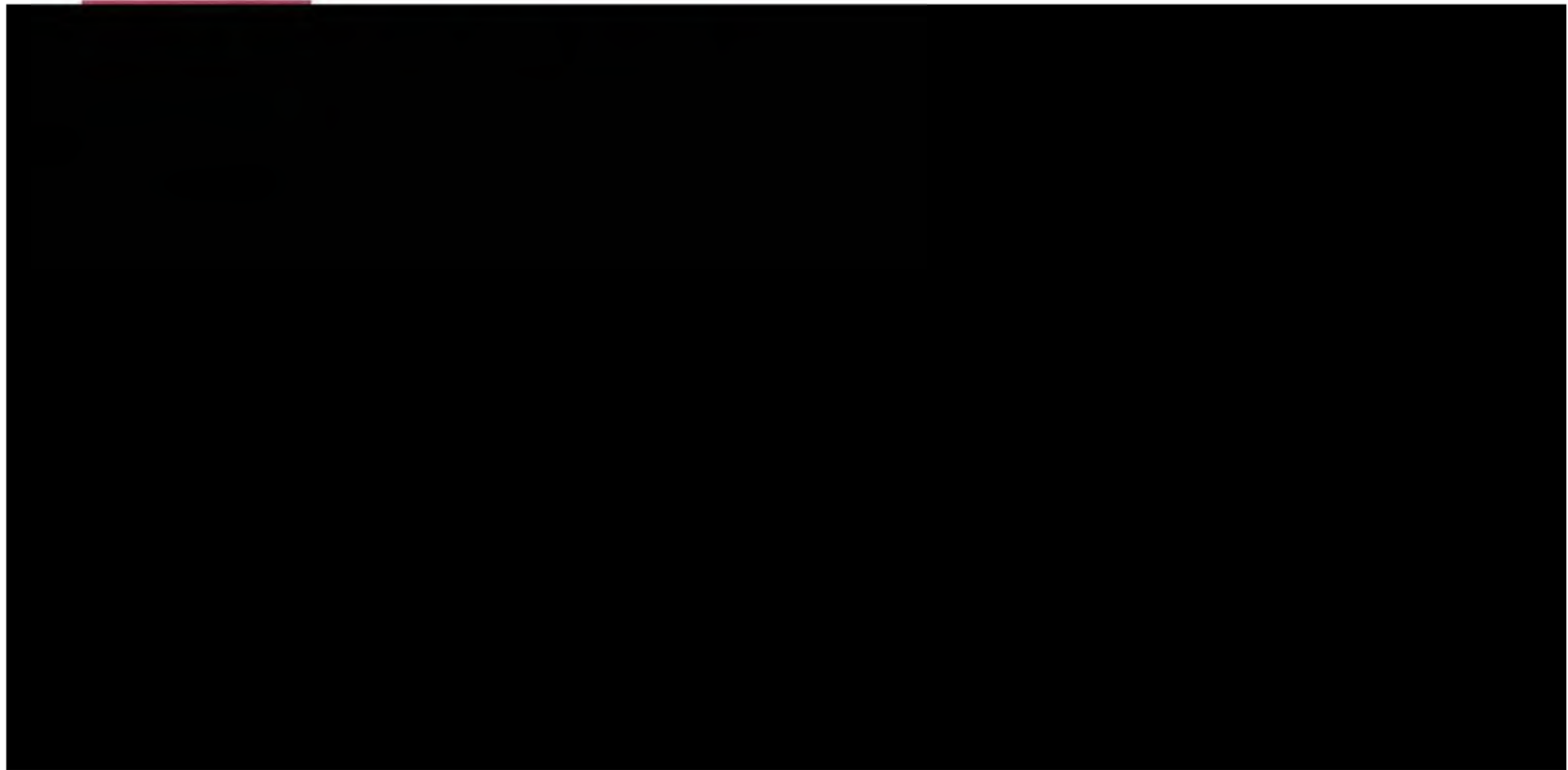


SABR-000609941

SUPPLIER AND AGENCY UPDATES

SABR-000609942

Agency Pipeline & Top Deals



Supplier Commerce Pipeline & Closed Deals



Speaker Notes for Slide 4

[REDACTED]

[REDACTED]

DISTRIBUTION STRATEGY UPDATE

SABR-000609946

Working to deliver earnings in the near term to ensure investment for the next phase of innovation and growth

[REDACTED]
(Nov '17 – Feb '18)

What is our strategy for ensuring earnings to invest for innovation and growth?
(Focus on <3 year)

Key takeaways:

- Our business is resilient and in the near-term [REDACTED] will remain on a "Status Quo" model
- [REDACTED] are requesting non "Status Quo" models
- Our most immediate decision will be responding to non "Status Quo" requests from [REDACTED]

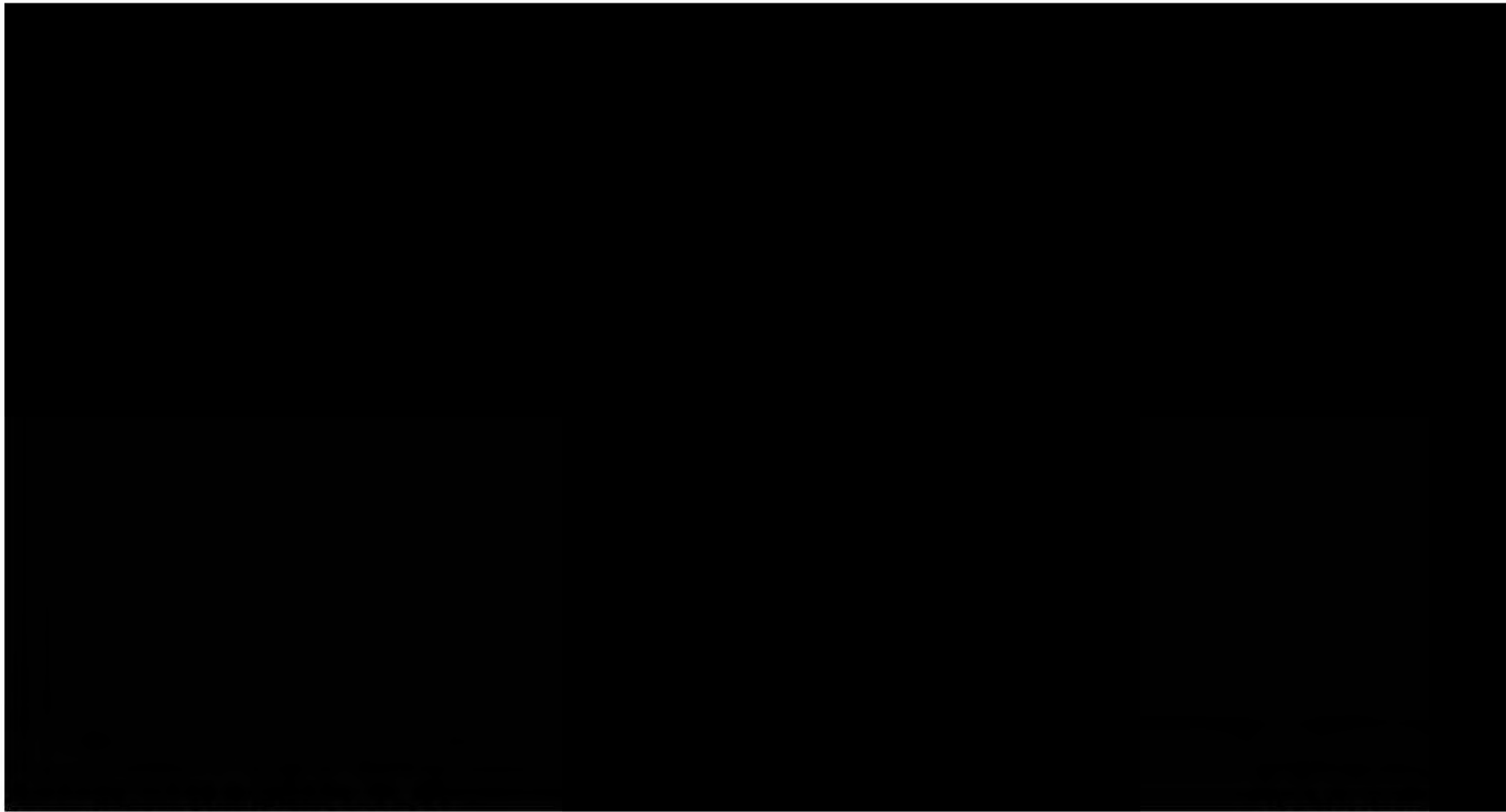
Main focus of today's discussion

[REDACTED]
(Jan '18 – May '18)

How do we maintain competitive advantage and relevancy to reimagine the business of travel for long-term success?
(Focus on 3+ years)

Key takeaways:

- In the 3+ year time frame, we expect continued pressures on our GDS commercial model and technology
- Identifying additional sources of value will be critical to continue to drive growth in our economics
- We must begin to address this now given lead time needed to reposition the business

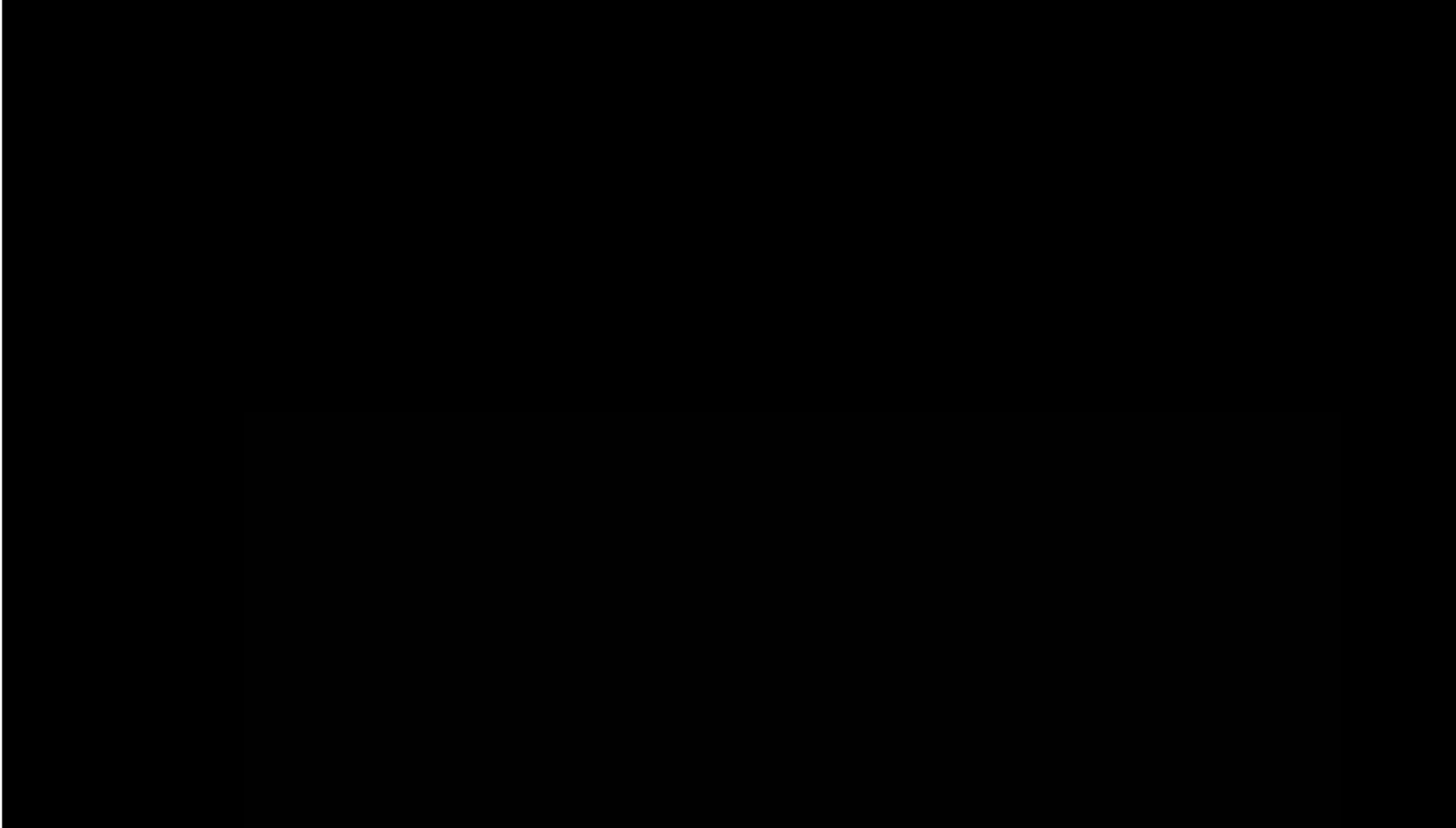


[Redacted text]

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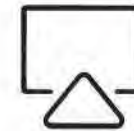


Sabre is focused on supporting the needs of our customers.
Key customers in the US marketplace tell us they want...



Airlines

- More sales of ancillaries and high value branded fares
- Cost reduction to become indifferent between direct and indirect channel
- Marketplace where airline can compete effectively against other airlines
 - Unbiased displays and agency incentives
- Greater customer insights and more effective merchandising
- Content flexibility to create dynamic offers for different customer segments
- Mutually aligned relationship with Sabre GDS



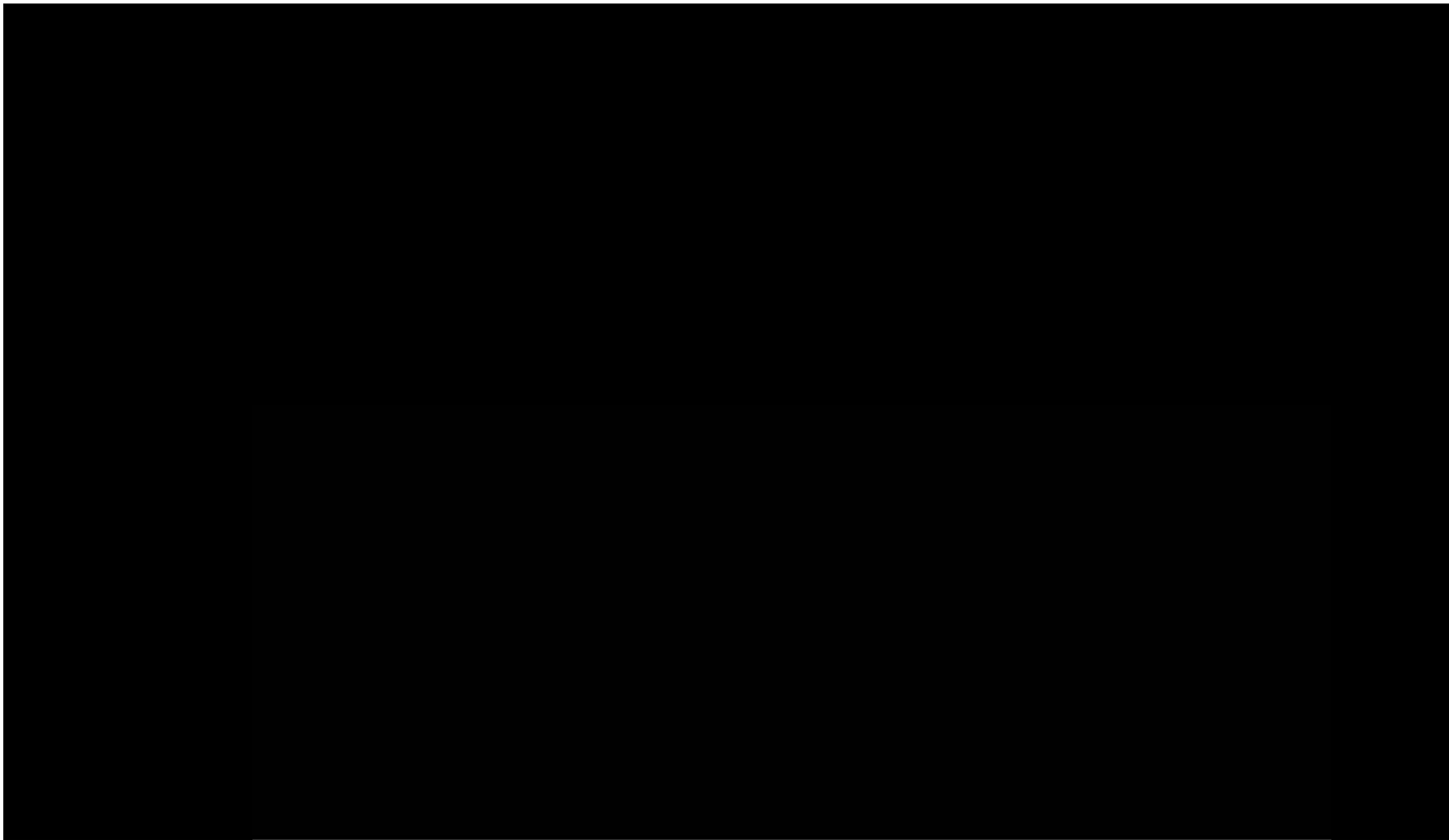
Agencies

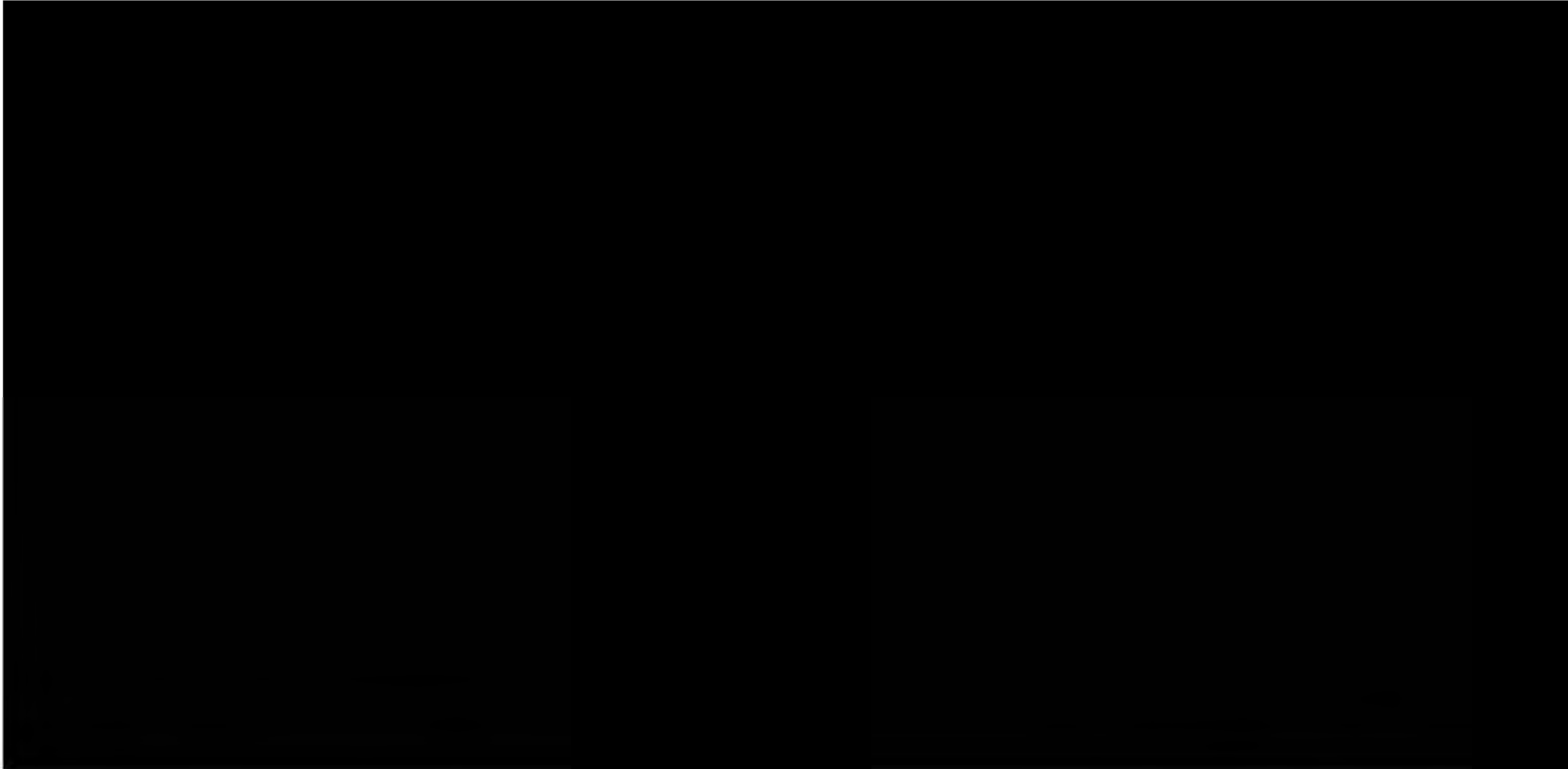
- Access to relevant content from key airlines, including LCCs
- Technology to drive efficient operations and revenue opportunities
- Competitive incentives vs. alternative GDS providers

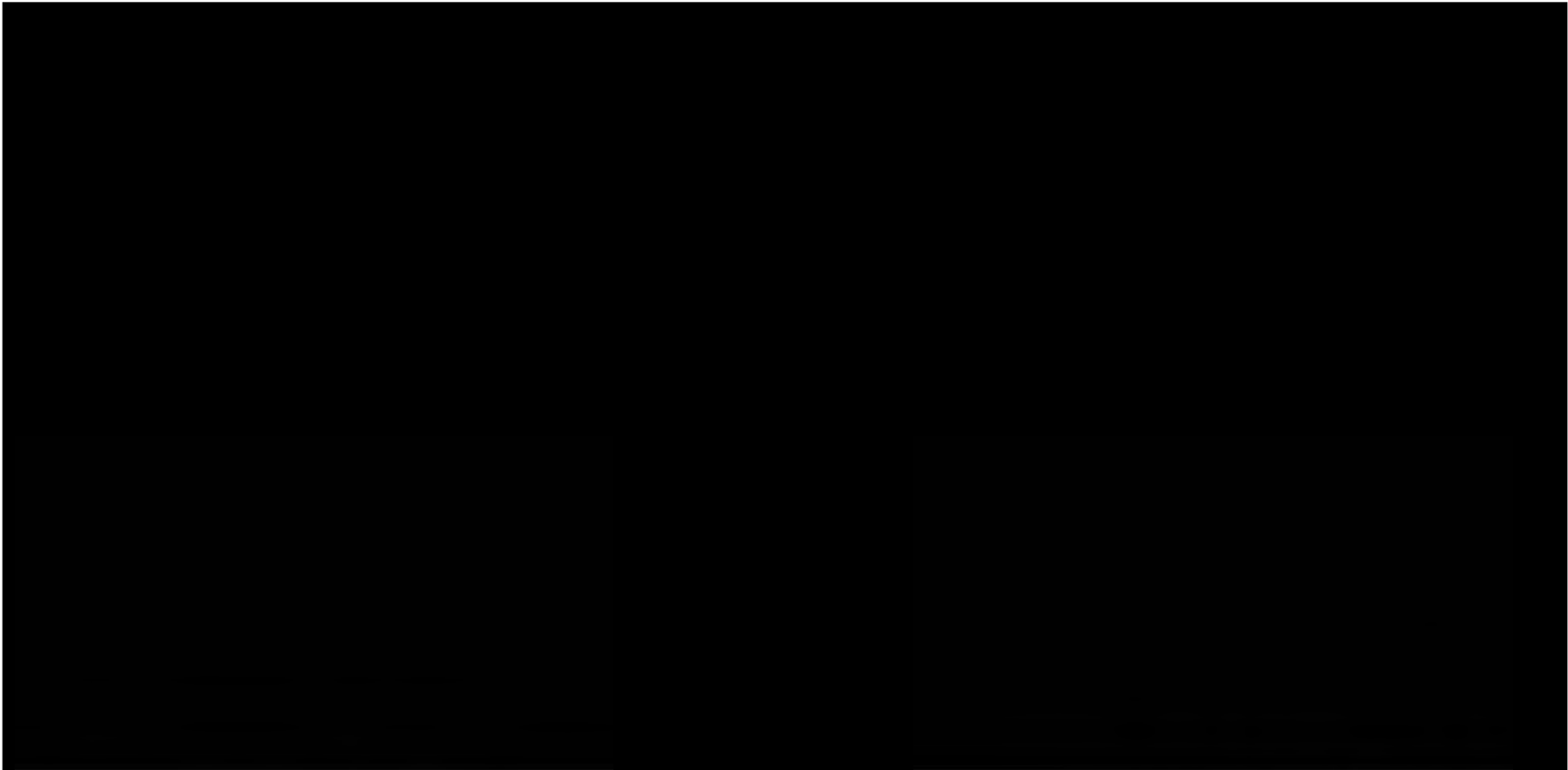


A [redacted] option best meets the US marketplace needs

	Pros	Key risks	Likelihood
Recommend	[redacted]		 <hr/>  <hr/> 







Note: USPOs bookings for all carriers
Source: 2017 MIDT NAM

SABR-000609957

Next steps

