Unleashing The Power Of The GDS

Sean Menke
President, Travel Network
An ecosystem that fuels the marketplace

Travel Network

Global marketplace that offers better yields, global customer access and consumer choice

Suppliers

Agencies

Travelers

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An ecosystem that fuels the marketplace

Global marketplace that offers better yields, global customer access and consumer choice

Travel Network

420 Airlines
750,000 Hotels
39 Car
17 Cruise
52 Rail
260 Tour

Agencies

Travelers

Airlines
Hotels
Car
Cruise
Rail
Tour

Sabre Red Workspace
Platform Solutions
Agencies

Corporate
travelers
Leisure
travelers
Travelers

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Travel Network

Global marketplace that offers better yields, global customer access and consumer choice

Platform Solutions

- Sabre Red Workspace Platform
- Online Travel Agencies
- Corporate Booking Tools
- Mobile Apps
- Emerging

Travelers
An ecosystem that fuels the marketplace

Travel Network

- Global marketplace that offers better yields, global customer access and consumer choice
- 67,000 travel agencies in 144 countries
- More than 75 of top 100 corporations
- More than 50% share of travel management companies
- Over 46% share of online travel agencies
- Over 80% of US civilian & military government

Travelers
An ecosystem that fuels the marketplace

Travel Network

Global marketplace that offers better yields, global customer access and consumer choice

- 67,000 travel agencies in 144 countries
- More than 75 of top 100 corporations
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- Over 80% of US civilian & military government

Corporate travelers

Leisure travelers
Future of Air seeking new heights

Growing and vibrant marketplace
Global airline capacity at 3.5% CAGR above world GDP of 2.4%

Diversity of business models
Low cost carriers more than 25% of global airline capacity

Ancillary revenue sources
In five years, ancillary revenues grew from $23B to nearly $60B
Creating opportunity within non-Air

Confidence in the GDS
Hotel bookings through the indirect channel have grown 19%

Additional attachment opportunity
If hotel is attached to air, car is also attached 64% of the time

Significant revenue source
Margins on non-air bookings are ~45% greater than air only
Visual merchandising creates an influential effect

- Expansive product information
- Enhanced merchandising
- High-impact visuals
Enabling the agencies to flourish

The future of travel is bright
One billion additional people traveling by 2030

Supplier merchandising driving complexity
Branded fares and ancillaries heavily weighted to direct channel

Multiple distribution options require flexibility
Platform access built for multiple distribution standards
Flexibility transforms agencies for the next generation
Flexibility transforms agencies for the next generation
Seamless shopping and booking for agents

### Air Shopping

<table>
<thead>
<tr>
<th>Flight Number</th>
<th>Departure</th>
<th>Arrival</th>
<th>Distance</th>
<th>Duration</th>
<th>Class</th>
<th>Price</th>
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<td>AB 7421</td>
<td>ORD - Chicago</td>
<td>TXL - Berlin Tegel</td>
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<td>E</td>
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<td>USD 1453.16</td>
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</table>

### Hotel Shopping

### Car Shopping

### Passenger Itinerary
Seamless shopping and booking for agents

- Air Shopping
- Hotel Shopping
- Car Shopping
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- Hotel Shopping
- Car Shopping
- Passenger Itinerary

Wyndham Berlin Excelsior (WY0035651)

Best Available Rate With Break (N1QC05)
Standard room, single bed ...

Nightly Rate
201.53 EUR

Estimated Total
(6 nights)
752.03 EUR

Approx Total Price
752.03 EUR

Room Rate
201.53 EUR

Tax & Service
106.29 EUR

Total
728.52 EUR

Sabre

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Seamless shopping and booking for agents

Car Shopping

Enterprise

EW7DE
MBMN
103.78/Drop

Pick up: Berlin Tegel TXL 21 May Sat 8:00AM
Drop off: Berlin Tegel TXL 27 May Fri 9:00AM

All total prices are returned Direct Connect from car associate.

Rate Plan in USD

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<thead>
<tr>
<th>Rate Plan</th>
<th>Mileage</th>
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<tr>
<td>Extra Day</td>
<td>Unlimited</td>
</tr>
<tr>
<td>Extra Hour</td>
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Subtotal

Note 0.00

Air Shopping

Hotel Shopping

Passenger Itinerary
Simplified itinerary view for agents

<table>
<thead>
<tr>
<th></th>
<th>FULL</th>
<th>ITINERARY</th>
<th>PRICE QUOTES</th>
<th>TRAVELERS</th>
<th>PAYMENT &amp; TICKETING</th>
<th>DOCUMENTS</th>
<th>REQUESTS &amp; REMARKS</th>
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<td></td>
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<td>ORD - Chicago Ohare</td>
<td>TXL - Berlin Tegel</td>
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<td>3</td>
<td></td>
<td>Wyndham Berlin Excelsior</td>
<td>Berlin De 10623</td>
<td>Sat, 21MAY</td>
<td>Fri, 27MAY</td>
<td>1 Room</td>
<td>1 Guest</td>
<td>HK</td>
</tr>
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<td></td>
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<td>Check-Out</td>
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<td>Berlin Tegel TXL</td>
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</table>
Positioning for growth in the ecosystem

Always on the go
In the US, 48% of travelers use a smartphone to plan or book a trip

Mobile first
80% of corporate travel managers consider mobile a high priority

Next generation market
Millennials will make up 50% of the global workforce by 2020
Mobility is more than just a channel

87% Of the US use their smartphone while traveling
Mobility is more than just a channel

**Mid-trip Activity**

- **81%** Use mobile for navigation
- **67%** Use mobile to find activities nearby
- **35%** Of trip spending
A single place for all your trips

Travel Management

Smart Recommendations

Mobile Changes
Accelerating our global footprint with technology

NAM
GDS Share
Sabre: 54.5%
Amadeus: 20.1%
Travelport: 25.4%

LAC
GDS Share
Sabre: 54.6%
Amadeus: 39.4%
Travelport: 6.0%

APAC
GDS Share
Sabre: 39.1%
Amadeus: 36.0%
Travelport: 24.9%

Notes: MIDT 2015 share results
Financials exclude Abacus
 Positioned to deal with global distribution complexity

 Deep relationships within the travel ecosystem

 Enhanced selling capabilities through multiple channels

 Broader reach, increased frequency and revenue growth