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TRAVEL SERVICES LTD

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#### **ABOUT THIS REPORT**

The present report provides analysis of the competitive position of online travel agencies (OTA) distributing their content via metasearch engines. The report provides insights on the number of offers per route and other interesting parameters. The report also features the significance of virtual interlining on the UK marketplace.

In terms of scope, we analysed 100 routes originating from different airports in UK to destinations in Europe, Asia, Middle East, Africa, North America and South America. Some of the routes are among the world's busiest, others are less frequently travelled. We searched for return flights taking place one month from the date of search. The return date is set to one week from the date of arrival.

In terms of technology, we utilized proprietary developed software. For the purposes of the comparison we used skyscanner.com, and performed searches under the UK (United Kingdom) market and PL (Poland) market. Only OTAs and airlines offering flights under these two markets have been considered. Ryanair (FR) has been excluded from the results.

In terms of conveyed information regarding virtual interlining, we applied proprietary-developed technics and algorithms that detect virtual interlining fares. The algorithms do not take into account virtual connections that are formed by regular carriers, as possible traditional interlining agreements may exist. It is important to note that Ryanair (FR) has been excluded from the statistics. Since Ryanair is a major carrier out of the UK market, we believe that the actual share of virtual interlining is bigger.

#### Glossary of terms

**OTA:** Online travel agency

**Itinerary:** Flights or flight combinations returned by skyscanner.com based on (user) search **Offer:** A price returned by a vendor for itinerary (there could be multiple offers per itinerary) **Market:** A localized search environment in skyscanner.com for residents of a certain country **Vendor:** Online travel agency (OTA) or airline distributing air fares via skyscanner.com

#### Disclaimer

The information in this report is prepared by Travel Services Itd by means of automatic data collection and manual research. We have made every effort to use reliable information, but we make no representation that it is accurate and complete. In no event shall Travel Services Itd and its partners be liable for damages, expenses, loss of opportunity or profit caused by the use of content in this report.

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#### About the authors

SafeConnect (dba as Travel Services ltd) is an IT & consulting company serving the travel industry. We offer services in the area of virtual interlining. As part of our portfolio we carry out competitive data analysis aimed at helping online travel agencies to understand and manage their competitive position for both their traditional and virtual interlining products. A number of in-depth customized reports can be prepared for various markets, date ranges and routes. A very high level of detail can be achieved as a result of the proprietary software built for the purpose.

For more information you can visit our website <a href="www.safeconnect.pl">www.safeconnect.pl</a> and contact us by sending an email to <a href="mailto:contact@safeconnect.pl">contact@safeconnect.pl</a>



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# **Explanations**

The present report is based on the following searches:

	search date	flight date	return date	market	number of routes
1	2018-05-26	2018-06-25	2018-07-02	UK	100
2	2018-05-26	2018-06-25	2018-07-02	PL	100
3	2018-05-27	2018-06-26	2018-07-03	UK	100
4	2018-05-27	2018-06-26	2018-07-03	PL	100
5	2018-05-28	2018-06-27	2018-07-04	UK	100
6	2018-05-28	2018-06-27	2018-07-04	PL	100

Figure 1 Information on routes

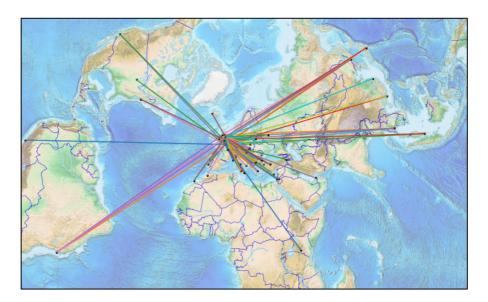


Figure 2 Map of searched routes

The complete list of routes you can find in the appendix at the bottom of this document.

## 1. Top Vendors by offers

#### 1.1 Top 10 vendors in terms of offers

The bellow table refers to the breakdown of the total offers produced for all searched routes and travel dates for the UK market.

	Vendor	Itineraries	Percent
1	Expedia	92731	17.1%
2	Ebookers	76910	14.2%
3	GotoGate	62286	11.5%
4	Opodo	39958	7.4%
5	eDreams	38071	7.0%
6	lastminute.com	25245	4.7%
7	Mytrip	20922	3.9%
8	Kiwi.com	19338	3.6%
9	Trip.com	18517	3.4%
10	BudgetAir	17549	3.2%
11	Others	130168	24.0%

Figure 3 Top 10 vendors in terms of offers

A pie chart visualizing the above table:

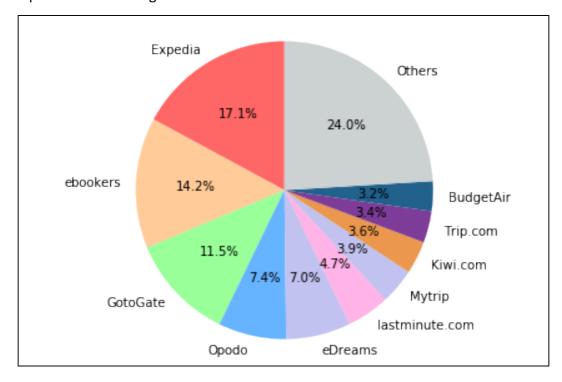


Figure 4 Pie chart of top vendors

#### 1.2 Top 10 vendors by market

The below table refers to the percentage breakdown of the total offers for the UK market and the Polish market separately, as well as an average for both markets.

	Vendor	All %	UK %	PL %
1	GotoGate	16.2	11.5	23
2	Expedia	-	17.1	_
3	Opodo	9.5	7.4	12.7
4	Ebookers	-	14.2	_
5	Mytrip	4.7	3.9	6
6	BudgetAir	4.5	3.2	6.4
7	Kiwi.com	4.4	3.6	5.6
8	eDreams	-	7	_
9	Tripsta	4.0	1.9	7.1
10	Airtickets	2.9	_	7.1

Figure 5 Vendors break down per market

#### 1.3 Top 10 vendors per search date in terms of offers

Dynamics of produced offers by top vendors per searched date for UK and PL markets:

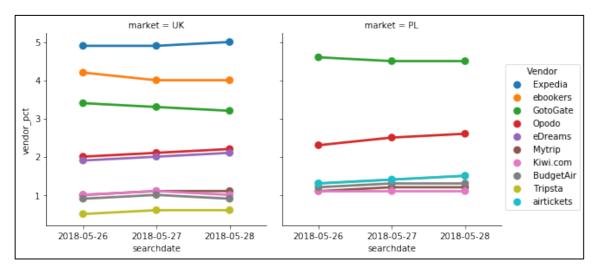


Figure 6 Number of offers dynamics per search date

# 2. Number of offers report

The 5 routes which produced highest average number of offers (search count cut at 1000):

	From	То	routes
1	London	Bangkok	1000+
2	London	Los Angeles International	1000+
3	Manchester	Moscow	1000+
4	London	Moscow	1000+
5	London	Frankfurt	1000+

The 5 routes which produced lowest average number of offers:

	From	to	routes
96	Glasgow	Vilnius	233
97	Newcastle	Fuerteventura	205
98	Belfast	Ankara Esenboga	187
99	Glasgow	Katowice	138
100	Glasgow	Cologne	72

# 3. Vendors statistics by price

## 3.1 Vendors offering the lowest price option

The table refers to the number of times a vendor had a quote for the cheapest offer:

	Vendor	Itineraries	Percent
1	Kiwi.com	47	15.7%
2	Mytrip	42	14.0%
3	GotoGate	30	10.0%
4	EasyJet	26	8.7%
5	BudgetAir	23	7.7%
6	Wizz Air	21	7.0%
7	Expedia	18	6.0%
8	TravelTrolley	12	4.0%
9	Travelup	10	3.3%
10	Flybe	10	3.3%
11	Others	61	20.3%

Figure 7 Percentage when the vendor quoted for the cheapest offer (UK Market)

#### A pie chart visualizing the above table:

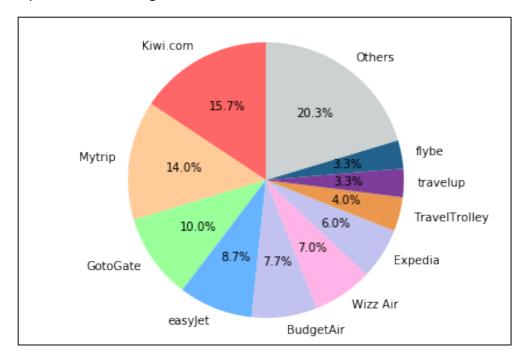


Figure 8 Pie chart visualizing figure 7

#### 3.2 Vendors offering the lowest price option per searched date

The below graph shows how many times a vendor had the best absolute price - first place in the first itinerary:

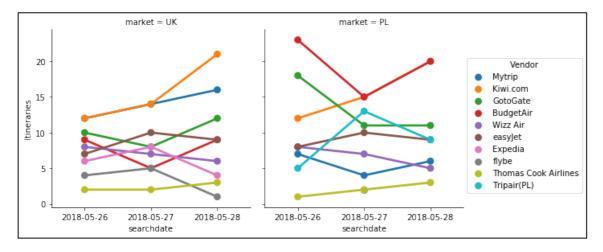


Figure 9 Absolute lowest price

#### 3.3 Top 10 vendors with offers in the top 10 results per route

Percent of times a vendor had offers for the cheapest 10 results per routes. Note, it does not necessarily mean that that the vendor always quoted the absolute cheapest price, as for each result, there are multiple quotes by various vendors.

	Vendor	Percent
1	Opodo	6.9%
2	Kiwi.com	6.8%
3	lastminute.com	6.8%
4	Expedia	6.4%
5	eDreams	6.3%
6	GotoGate	6.3%
7	Mytrip	6.2%
8	BudgetAir	6.0%
<b>9</b> Ebooke	Ebookers	5.2%
10	Tripsta	3.6%

Figure 10 Top 10 vendors for top 10 results

# 3.4 Vendor by position in the same itinerary relative to the other vendors - first 10 positions

On the below figure you can see the position of a vendor in the same itinerary related to other vendors, sorted by price:

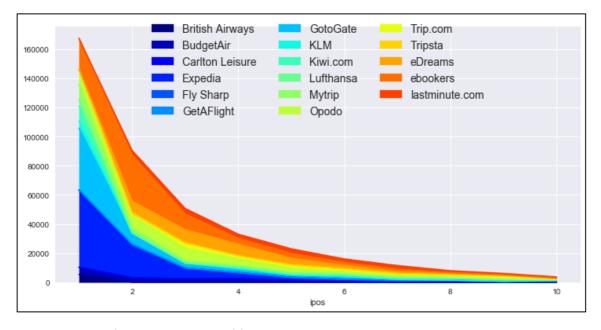


Figure 11 Vendor position, sorted by price

## 4. Virtual Interlining

Virtual interlining refers to flight combinations consisting of connecting flights that are prepackaged by OTAs.

## 4.1 Percent of itineraries with virtual interlining offers:

In all itineraries:

Virtual Itineraries
1.0%

In the first 10 search results:

Virtual Itineraries top 10 results
8.2%

## 4.2 Percent of cases when virtual interlining was the cheapest option

Virtual Itineraries cheapest option
11.0%

#### 4.3 Virtual Itineraries by vendor and market

market	vendor	All itineraries	Virtual itineraries	Percent Virtual itineraries		
UK	Kiwi.com	19338	997	5.2%		
UK	GatwickConnects	132	132	100.0%		
UK	Dohop	162	38	23.5%		
	Same data for Polish market					
PL	Kiwi.com	20527	1290	6.3%		
PL	Flyhacks	59	28	47.5%		

Figure 12 Virtual interlining market share

## 4.4 Virtual interlining the cheapest fare by participating airline

The below table shows how many times the mentioned airlines appear in virtual itineraries, only in the cases when these itineraries are the cheapest for the search. Note that Ryanair is excluded from the comparison.

	airline	itineraries	Percent
1	easyJet, U2	29	29.0%
2	Wizz Air, W6	25	25.0%
3	Flybe, BE	7	7.0%
4	Aeroflot Russian Airlines, SU	5	5.0%
5	Jet2.com, LS	5	5.0%
6	Blue Air, 0B	3	3.0%
7	British Airways, BA	3	3.0%
8	Ural Airlines, U6	3	3.0%
9	Condor Flugdienst, DE	3	3.0%
10	Thomas Cook Airlines, MT	2	2.0%
11	First Choice Airways, DP	2	2.0%
12	LOT Polish Airlines, LO	2	2.0%
13	Laudamotion, OE	2	2.0%
14	S7 Airlines, S7	2	2.0%
15	UTair Aviation, UT	1	1.0%
16	Aerocondor, 2B	1	1.0%
17	SunExpress, XQ	1	1.0%
18	Continental Express, CO	1	1.0%
19	Bulgaria Air, FB	1	1.0%
20	Blue Panorama Airlines, BV	1	1.0%

Figure 13 Airlines break-down in virtual combinations

# **Appendix - List of searched routes**

From	5 10 10 0	<b>T</b> -	F	<b>-</b> -
Belfast         Larnaca         London         Sofia           Belfast         Rome         London         Stuttgart           Belfast         Tel Aviv         London         Tel Aviv           Belfast         Tirana         London         Triana           Glasgow         Bengkok         London         Virana           Glasgow         Cologne         London         Virinus           Glasgow         Katowice         London         Virinus           Glasgow         Rio De Janeiro         London         Winius           Glasgow         Rio De Janeiro         London         Warsaw           Glasgow         Stuttgart         London         Zagreb           Glasgow         Virana         London         Zagreb           Glasgow         Virana         Manchester         Athens International           Glasgow         Viralivostok         Manchester         Athens International           Glasgow         Viralivostok         Manchester         Dublin           London         Amman         Manchester         Dublin           London         Antare Esenboga         Manchester         Hong Kong           London         Antare Senboga         Manchester </td <td></td> <td>1.5</td> <td></td> <td></td>		1.5		
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