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OTA COMPETITIVE REPORT FLIGHTS OUTBOUND UK

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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

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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 www.safeconnect.pl and contact us by sending an email to contact@safeconnect.pl



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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

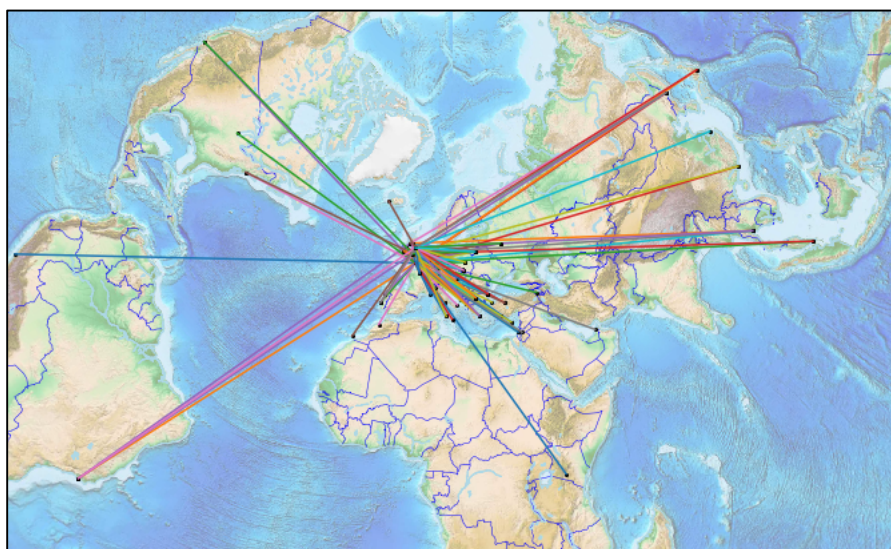


Figure 2 Map of searched routes

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:

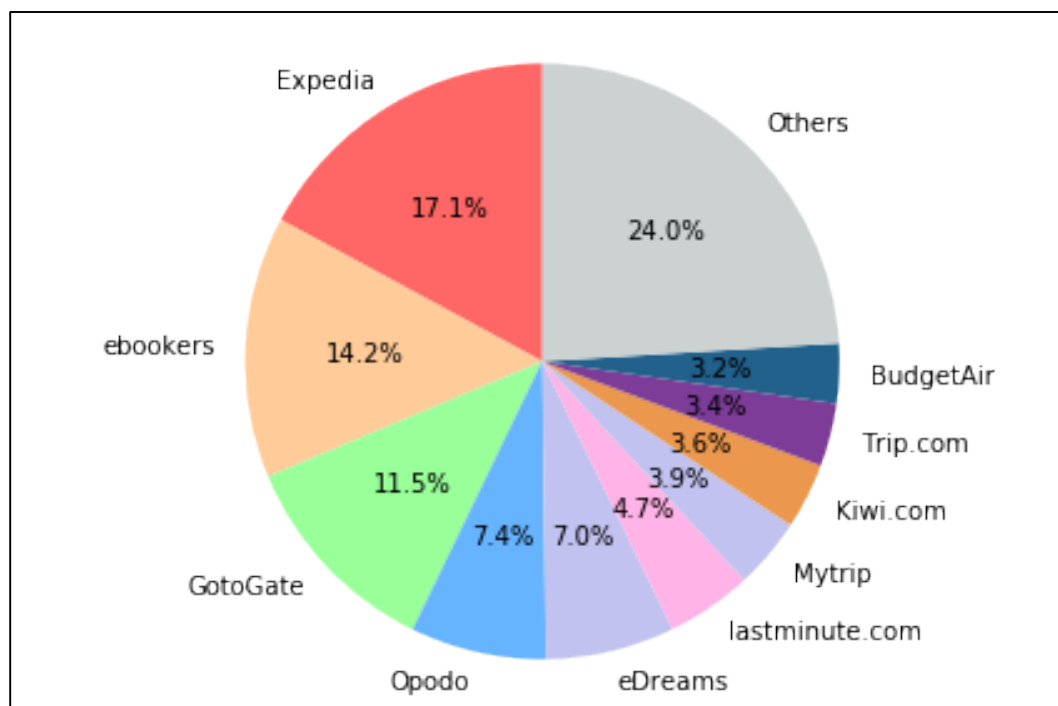


Figure 4 Pie chart of top vendors

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:

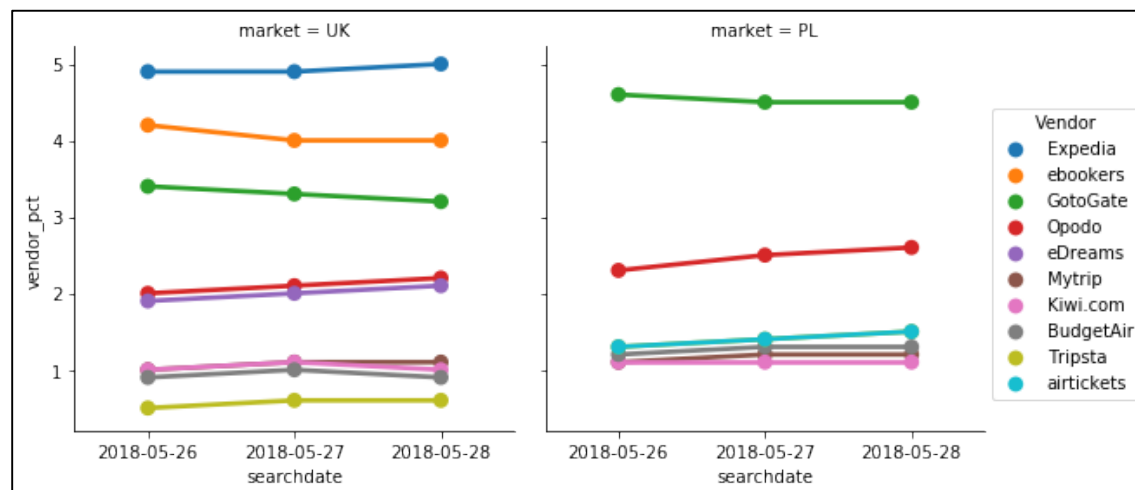


Figure 6 Number of offers dynamics per search date

2. Number of offers report

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

	From	To	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:

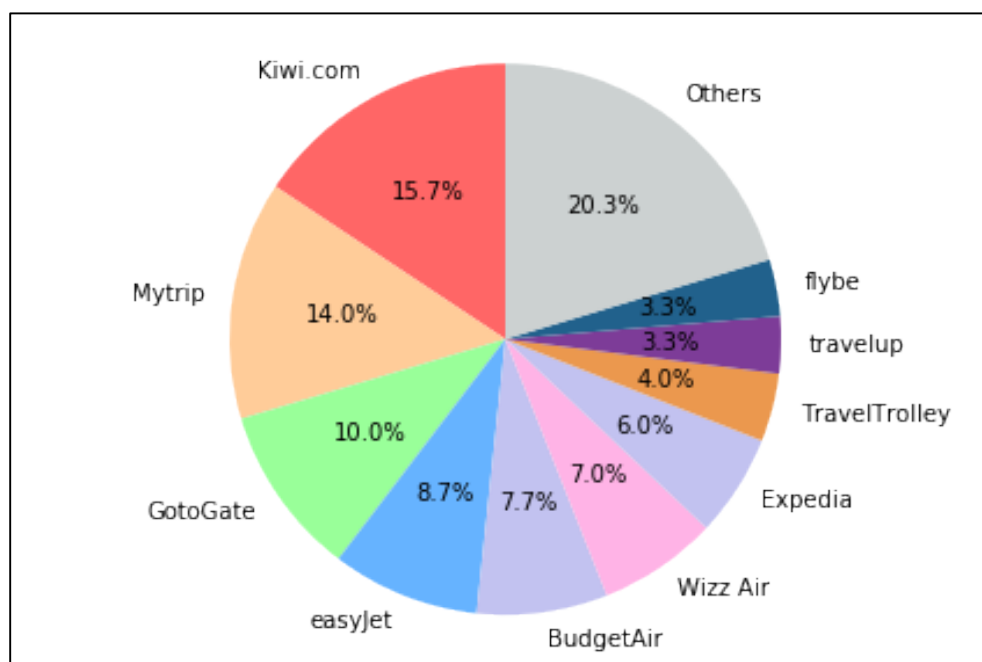


Figure 8 Pie chart visualizing figure 7

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:

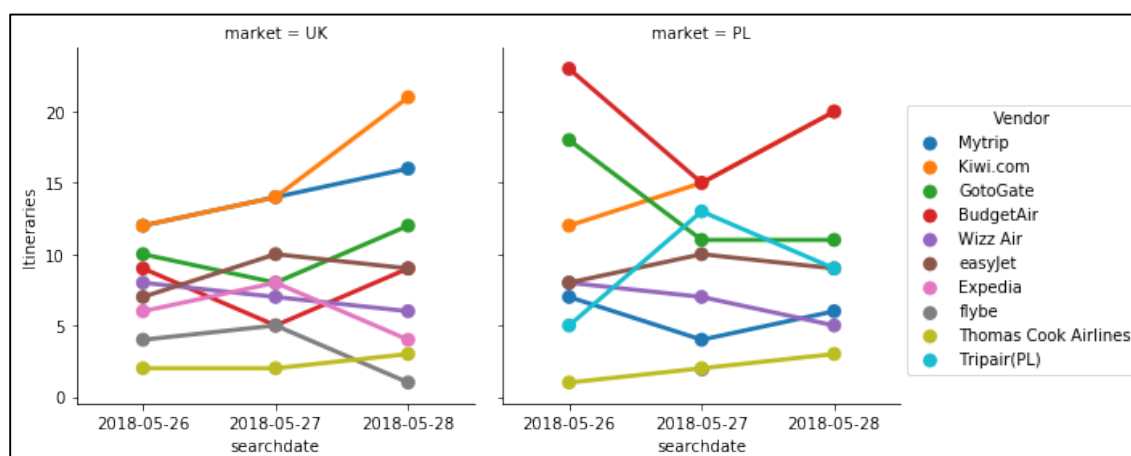


Figure 9 Absolute lowest price

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 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%
9	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:

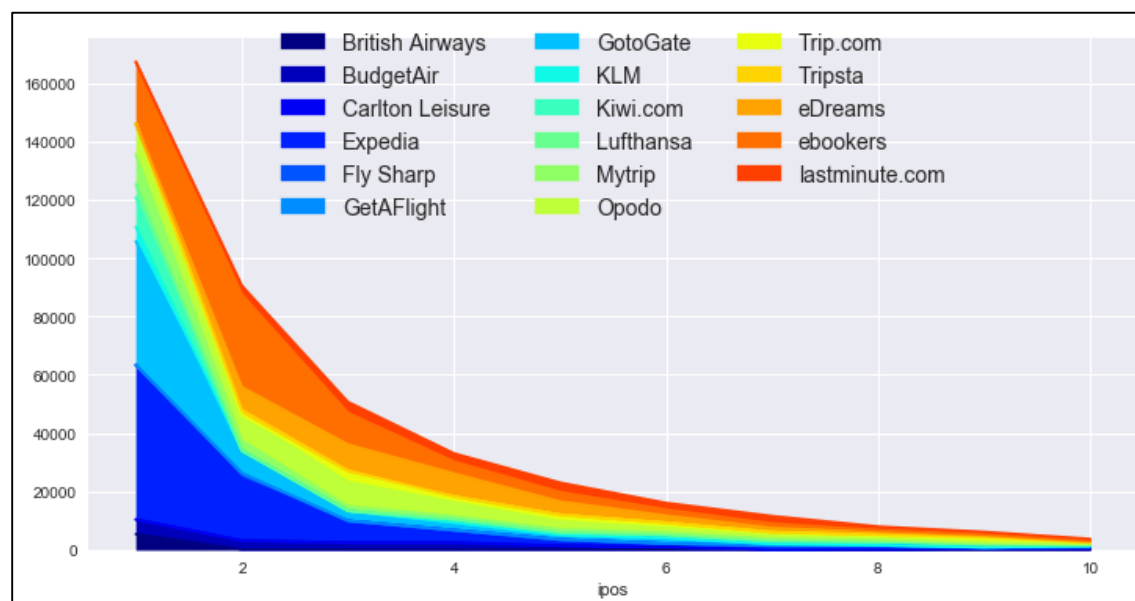


Figure 11 Vendor position, sorted by price

4. Virtual Interlining

Virtual interlining refers to flight combinations consisting of connecting flights that are pre-packaged 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, OB	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	To	From	To
Belfast	Ankara Esenboga	London	Singapore Changi
Belfast	Larnaca	London	Sofia
Belfast	Rome	London	Stuttgart
Belfast	Tel Aviv	London	Tel Aviv
Belfast	Tirana	London	Tirana
Glasgow	Bangkok	London	Tokyo Narita
Glasgow	Berlin	London	Varna
Glasgow	Cologne	London	Vienna
Glasgow	Katowice	London	Vilnius
Glasgow	Krakow	London	Vladivostok
Glasgow	Rio De Janeiro	London	Warsaw
Glasgow	Stuttgart	London	Yerevan
Glasgow	Varna	London	Zagreb
Glasgow	Vienna	Manchester	Amsterdam
Glasgow	Vilnius	Manchester	Athens International
Glasgow	Vladivostok	Manchester	Bangkok
London	Amman	Manchester	Dublin
London	Amsterdam	Manchester	Edinburgh
London	Ankara Esenboga	Manchester	Hong Kong
London	Antalya	Manchester	Krakow
London	Athens International	Manchester	Lisbon
London	Bangkok	Manchester	Los Angeles International
London	Bari	Manchester	Moscow
London	Berlin	Manchester	New York City
London	Casablanca Mohamed V.	Manchester	Paris
London	Catania Fontanarossa	Manchester	Rio De Janeiro
London	Chicago	Manchester	Singapore Changi
London	Cologne	Manchester	Sofia
London	Dubai	Manchester	Varna
London	Dublin	Manchester	Vilnius
London	Dubrovnik	Manchester	Vladivostok
London	Edinburgh	Manchester	Warsaw
London	Frankfurt	Newcastle	Athens International
London	Hong Kong	Newcastle	Bangkok
London	Istanbul	Newcastle	Fuerteventura
London	Katowice	Newcastle	Krakow
London	Krakow	Newcastle	Lisbon
London	Larnaca	Newcastle	Moscow
London	Lima	Newcastle	Palermo
London	Lisbon	Newcastle	Paris
London	Los Angeles International	Newcastle	Reykjavik
London	Milan	Newcastle	Rio De Janeiro
London	Moscow	Newcastle	Shanghai
London	Nairobi	Newcastle	Sofia
London	New York City	Newcastle	Tokyo Narita
London	Nice	Newcastle	Varna
London	Palermo	Newcastle	Vilnius
London	Paris	Newcastle	Vladivostok
London	Porto	Newcastle	Warsaw
London	Rio De Janeiro	London	Rome