

A Cross-Border Examination of 20 Travel Web Sites
Selling International Airline Tickets
in the United States and Six Western European Countries

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Executive Summary

The growth of Internet commerce has been so quick that most Americans have not had time to consider the long-term effects of shopping and buying online. In many ways, it is a process that continues to evolve and unfold.

Travel booking is playing a key role in shaping the future of e-commerce on the Web, and continues to lead all other segments of online purchases. But what many Americans may not realize is that the growth of online travel booking is now a worldwide phenomenon, as travel companies on every continent—in a variety of economies and governments—have turned to the Web to sell airline seats and other travel products.

This was made clear in October 2003, when Consumer Reports WebWatch was invited to present its most recent findings before the Consumers International World Congress in Lisbon, Portugal. What became apparent is that non-profit consumer organizations from around the world were struggling to understand the burgeoning growth of travel Web sites and the positive and potentially negative effects of that growth on consumers.

From Lisbon came the concept of expanding Consumer Reports WebWatch's proven methodologies for testing travel Web sites. WebWatch decided to conduct a first-of-its-kind comparative testing project that would simultaneously examine leading travel sites in six European countries and the United States.

Guided by the efforts of London-based Consumers International, six other consumer organizations joined the project. They were Test-Achats/Test-Aankoop of Belgium; the Danish Consumer Council of Denmark; UFC-Que Choisir? of France; Stiftung-Warentest of Germany; Consumentenbond of The Netherlands and Consumers' Association of the U.K.

Consumer Reports WebWatch directed the project, using accepted testing methods developed in conjunction with Consumers Union's statistics department, highlighted by real-time testing, identical itineraries, and repetitive queries designed to ensure statistically valid sampling. The routes examined consisted of flights from the United States to Europe, as well as flights within Europe.

After Consumer Reports WebWatch conducted training of testers in The Hague, testing took place in June 2004, with 20 travel sites examined in all. Over four days, 144 trials were conducted for each of the 20 travel sites.

This travel testing project, the largest and most complicated ever undertaken by Consumer Reports WebWatch, yielded rich and fascinating results.

These are the most significant findings:

- “Fare-jumping”—in which inaccurately displayed prices suddenly increase or become unavailable during the shopping process—continues to be a credibility problem among all three major U.S. travel sites, Expedia, Orbitz and Travelocity.
- All the travel sites tested presented clear displays of tax and fee information. This represents a marked improvement in transparency, for which Consumer Reports WebWatch strongly advocates.
- Despite language and currency issues, several European travel sites could be viable alternatives for American consumers.
- Several European sites proved extremely adept at providing lowest fares, and posted some of the best performances recorded by Consumer Reports WebWatch. Overall, the highest percentage of lowest fares (49%) was provided for this testing project by the Belgian site Travelprice.
- Many of the most viable low-fare airline choices are not always available in the leading third-party travel sites. This is as true in Europe as it is in the United States (as exemplified by Southwest Airlines and JetBlue Airways).
- The flight and fare data provided by sister travel sites—such as the Expedia, Opodo, and Travelocity brands—varied widely from country to country, completely dispelling any notions that these sites are identical except for home pages and translations. In fact, each sister site clearly obtained its own inventory of airfares.
- When results were examined solely among six of the leading travel sites based in the United States and the United Kingdom, the British site Opodo comfortably led all Anglo-American sites.
- Nearly all the travel sites were twice as likely to provide a lowest fare on a route that originated in the site’s home country, as they were for all routes from all countries. Americans traveling from the U.K. to another Western European destination, for example, should consider using a British site to book a ticket.
- On the whole, English-language American and British sites did not perform as well as sites based in Belgium and Germany. When the sites were ranked by country, the United States trailed those two countries.
- Some sites are better at booking flights with longer reservation lead time than others. Conversely, other sites are better at booking flights with shorter lead time.
- Some of the travel sites were not able to process certain bookings, due to the length of the booking window or the departure or origin city. The American site Orbitz, for example, could only process airfare queries for routes originating in the United States.

The project was directed by William J. McGee, a travel journalist and consultant to Consumer Reports WebWatch and the Editor of *Consumer Reports Travel Letter* from 2000 to 2002. The project was completely funded by Consumer Reports WebWatch. Employees of Consumer Reports WebWatch assisted in drafting the methodology, participated in the testing, and contributed to this research report. Employees of Consumers International and the other participating European consumer organizations also assisted in selecting travel sites, testing, and evaluating results for their home countries. The final results were then evaluated by Consumer Reports WebWatch. The research report was edited by Beau Brendler, the director of Consumer Reports WebWatch.

Consumer Reports WebWatch Mission Statement

Consumer Reports WebWatch is a project of Consumers Union, the non-profit publisher of *Consumer Reports* magazine. The project is supported by grants from The Pew Charitable Trusts, the John S. and James L. Knight Foundation, and the Open Society Institute. Consumer Reports WebWatch in turn funded the research and production of this report, as it has done with similar reports on Web site credibility.

Consumer Reports WebWatch's mission is to improve the credibility of Web sites, through research, through articulation of best practices guidelines in specific sectors of Web publishing, and by working with ConsumerReports.org to produce ratings of Web sites using those guidelines. Consumer Reports WebWatch's research, guidelines, and e-Ratings are available for free at <http://www.consumerwebwatch.org>.

Consumer Reports WebWatch Travel Projects, 2002-2005

Here is a summary of the travel Web site projects undertaken by Consumer Reports WebWatch:

- “Travel Web Sites: You Still Need to Compare,” was released in June 2002. Consumer Reports WebWatch teamed with *Consumer Reports Travel Letter* (which ceased publication in December 2002) to extensively test travel Web sites providing domestic airfares. This report is available at www.consumerreports.org/main/detailv2.jsp?CONTENT%3C%3Ecnt_id=158287&FOLDER%3C%3Efolder_id=158259&bmUID=1033759487281.
- “Booking Hotels Online: An In-Depth Examination of Leading Hotel Web Sites,” was released in April 2003. This report is available at www.consumerwebwatch.org/news/hotels/index.html.
- “An Analysis of the Potential Benefits and Challenges of Booking Through a Car Rental Web Site,” was released in October 2003. This report is available at <http://www.consumerwebwatch.org/news/carrentals/index.html>.
- “Booking and Bidding Site Unseen: A Consumer’s Guide to Opaque Travel Web Sites,” examined alternative “opaque” travel booking Web sites and was released in December, 2003. This report is available at <http://www.consumerwebwatch.org/news/opaque/index.html>.
- “Global Concerns: An In-Depth Examination of Travel Web Sites Selling International Airline Tickets,” examined U.S.-based travel sites selling airline tickets on international routes originating in the United States and was released Sept. 22, 2004. This report is available at <http://www.consumerwebwatch.org/news/internationalairfare/index.html>.

Forthcoming projects include an examination of booking sites for premium (first-class and business-class) airline seats, scheduled for release at a Consumer WebWatch conference on the online travel market in Dallas, Texas, March 1, 2005. Further information on this conference is available at <http://www.consumerwebwatch.org> or by clicking here: http://www.ersvp.com/rsvp/reply.htm?evtr=bbifd&cacheid=1100113829.5591&co_brandid=ersvp&user_session=ede8e1d66123ea32145adf2df8ec7b05

Testing Methodology and Parameters

The online travel testing methodologies employed and improved upon by Consumer Reports WebWatch since 2000 were developed with key personnel at Consumers Union's research, statistics, survey, and fact-checking departments, as well as with the staff of the now-defunct *Consumer Reports Travel Letter*.

As the lead organization directing this multi-national project, Consumer Reports WebWatch employed these methodologies while training and overseeing European consumer organizations participating in these tests. Consumers International served as a liaison in bringing together these consumer organizations.

Consumer Reports WebWatch's partners in this project were:

- Consumers International
- Test-Achats/Test-Aankoop, Belgium
- The Danish Consumer Council, Denmark
- UFC-Que Choisir?, France
- Stiftung-Warentest, Germany
- Consumentenbond, The Netherlands
- Consumers' Association, U.K.

What follows is a detailed description of testing methodology and parameters.

Selection of Travel Web Sites

Consumer Reports WebWatch and Consumers International worked closely together to determine which travel Web sites to include in this project. Separately, each organization analyzed market share data and other factors, then further discussed findings with each participating consumer organization, since each had more in-depth knowledge of travel markets in those countries.

Several factors were critical. Only "integrated" third-party travel sites (Expedia, Opodo, Travelocity) were considered, which eliminated "branded" sites maintained by specific airlines and/or airline partners (British Airways, Northwest/KLM). Although Consumer Reports WebWatch has included branded sites in previous projects, the emphasis here was on major national travel sites offering a multitude of routes and fares.

In order to best analyze the European online airline market, Consumers International employed data from a variety of independent sources. All of this information was in the public domain. For this project, neither Consumer Reports WebWatch nor Consumers International contracted with independent consultants to obtain this information.

This global project encompassed 20 travel Web sites from seven countries. Figure 1 contains a complete guide to these sites.

Figure 1: Participating Travel Web Sites

Country	Web Site	URL	Language(s)	Currency
Belgium	Airstop	www.airstop.be	French/ English	EU euro
	BBLT	www.bblt.be	French	EU euro
	Travelprice	www.travelprice.be	French	EU euro
Denmark	Flybillet	www.flybillet.dk	Danish	Danish kroner
	Travellink	www.travellink.dk	Danish	Danish kroner
	Travelstart	www.travelstart.dk	Danish	Danish kroner
France	Opodo	www.opodo.fr	French	EU euro
Germany	Expedia	www.expedia.de	German	EU euro
	Opodo	www.opodo.de	German	EU euro
Netherlands	D-reizen	www.d-reizen.nl	Dutch	EU euro
	Ebookers	www.ebookers.nl	Dutch/ English	EU euro
	Expedia	www.expedia.nl	Dutch	EU euro
	Vliegtarieven	www.vliegtarieven.nl	Dutch	EU euro
	Vliegwinkel	www.vliegwinkel.nl	Dutch/ English	EU euro
United Kingdom	Expedia	www.expedia.co.uk	English	UK pound
	Opodo	www.opodo.co.uk	English	UK pound
	Travelocity	www.travelocity.co.uk	English	UK pound
United States	Expedia	www.expedia.com	English	US dollar
	Orbitz	www.orbitz.com	English	US dollar
	Travelocity	www.travelocity.com	English	US dollar

To represent the American market, Consumer Reports WebWatch selected the three largest integrated sites based in the U.S.: Expedia, Orbitz, and Travelocity. Here is further information about the domestic sites:

- Expedia (www.expedia.com) is based in Bellevue, Wash. and is owned by IAC/InterActiveCorp (USA Interactive). Expedia was formerly owned by Microsoft. Expedia is a sister company of Hotels.com and Hotwire.
- Orbitz (www.orbitz.com) is based in Chicago. On Sept. 29, 2004, after testing for this project was completed, Orbitz announced it had been acquired by Cendant Corporation, a New York City-based travel conglomerate that owns several travel Web sites, including CheapTickets.com and Lodging.com; a leading travel technology company, Galileo; and car rental firms Avis and Budget. Prior to the acquisition, Orbitz was owned by the nation's five largest

airlines: American Airlines, Continental Airlines, Delta Air Lines, Northwest Airlines, and United Airlines.

- Travelocity (www.travelocity.com) is based in Fort Worth, Texas, and is owned by Sabre Holdings. Travelocity was formerly owned by AMR, the parent company of American Airlines. Travelocity is a sister company of Sabre Travel Network, a global distribution system (GDS) used by travel agencies.

Among the travel sites selected for the other six countries, several were sister sites operating under the same brand in multiple international markets. Several other travel sites evolved into the online market from origins as offline travel agencies.

The three sets of sister sites tested were Expedia (Germany, The Netherlands, UK, and USA); Opodo (France, Germany, and UK); and Travelocity (UK and USA). A detailed comparative analysis of the performance of these sister sites is presented later in this report.

A note about Opodo: This site is often referred to as “The Orbitz of Europe” because it is owned by several major European airlines. They are listed on the Web site in the following order: British Airways, Air France, Alitalia, Iberia, KLM, Lufthansa, Aer Lingus, Austrian Airlines, Finnair, and Amadeus (a leading international travel technology company).

What follows is a complete listing of the travel Web sites selected for each of the seven participating countries for this testing project.

BELGIUM

- Airstop (www.airstop.be)
- BBLT (www.bblt.be)
- Travelprice (www.travelprice.be)

DENMARK

- Flybillet (www.flybillet.dk)
- Travellink (www.travellink.dk)
- Travelstart (www.travelstart.dk)

FRANCE

- Opodo (www.opodo.fr)

GERMANY

- Expedia (www.expedia.de)
- Opodo (www.opodo.de)

THE NETHERLANDS

- D-Reizen (www.d-reizen.nl)
- Ebookers (www.ebookers.nl)
- Expedia (www.expedia.nl)
- Vliegtarieven (www.vliegtarieven.nl)
- Vliegwinkel (www.vliegwinkel.nl)

UNITED KINGDOM

- Expedia (www.expedia.co.uk)
- Opodo (www.opodo.co.uk)
- Travelocity (www.travelocity.co.uk)

UNITED STATES

- Expedia (www.expedia.com)
- Orbitz (www.orbitz.com)
- Travelocity (www.travelocity.com)

Testing Methodology

All testing was conducted by testers trained by Consumer Reports WebWatch. As always, dry-run testing was conducted in advance to help ensure accuracy.

The director of this project and the director of Consumer Reports WebWatch met with representatives of Consumers International to discuss the parameters of this testing project in London in February 2004. Then they met with representatives from each of the participating European consumer organizations in The Hague in early June 2004, to conduct extensive training and dry-run testing. Finally, representatives from Consumer Reports WebWatch oversaw the testing project itself from London in mid-June 2004. Representatives from Consumer Reports WebWatch also participated as testers.

Consumer Reports WebWatch conducted all testing of the American and British travel sites. Consumer Reports WebWatch also conducted fact checking of test results of these six Anglo-American travel sites. Representatives from the remaining five European consumer organizations conducted their own testing of the remaining 14 travel sites, provided the initial analysis of their testing results, and conducted fact-checking in their native languages. Consumer Reports WebWatch then conducted the comparative analysis, converted currencies into U.S. dollars, and conducted fact checking of final findings provided by each of the participating organizations.

Statistical analysis provided by Consumers Union led to the creation of four separate tests, grouped into four separate testing days in mid-June 2004.

All testing was scheduled in advance and completed simultaneously in real-time. All testers queried airfares from previously distributed itineraries. In all cases, airfares were available for booking, but in no cases were airline seats purchased.

Each of the four separate tests consisted of 36 queries or trials. In total, this project consisted of 144 separate trials.

Although all sites were included in all trials, not all of them were capable of producing results for all 144 trials. Further explanation is provided below.

Testing Parameters and Specific Testing Criteria

Each test consisted of searching for specific airfares on high-volume international routes, both from the United States to Europe, as well as within Europe. These routes were selected after extensive input from all the participating consumer organizations. Ultimately, each organization played an important role in selecting the routes that originated in their home countries.

Extreme care was taken to provide balance in the routes selected, to ensure fairness not only for all of the participating organizations, but also for the travel Web sites selected. This was particularly important because one of the issues being explored was whether or not travel sites provide better deals on itineraries originating in their home countries.

For the routes that originated in the United States, Consumer Reports WebWatch examined passenger traffic and airfare data provided by the Bureau of Transportation Statistics of the U.S. Department of Transportation. However, the decision to balance these routes among all of the participating countries was a key factor as well.

As for the cities of departure, the participating European organizations provided valuable insights into selecting routes that offered high-volume air traffic (particularly in comparison to rail traffic), as well as low-fare competition. The emphasis was on leisure rather than business traffic, although the sampling included both.

Many of these routes offered nonstop service from one or more carriers, and many did not. Due to the nature of international travel, the sites tested for this project were not penalized for providing connecting flights or odd departure times (as, for example, they would be when Consumer Reports WebWatch tests domestic airline fares).

- The itineraries for all four tests remained the same throughout the testing period. For TEST #1 through TEST #4, the routes were:

- 1) Brussels/BRU—Barcelona/BCN
- 2) Brussels/BRU—Rome/FCO & CIA
- 3) Brussels/BRU—Copenhagen/CPH
- 4) Brussels/BRU—Casablanca/CMN

- 5) Brussels/BRU—New York/JFK
- 6) Copenhagen/CPH—Stockholm/ARN
- 7) Copenhagen/CPH—London/ANY AIRPORT
- 8) Copenhagen/CPH—Malaga/AGP
- 9) Copenhagen/CPH—Paris/CDG
- 10) Copenhagen/CPH—Nice/NCE
- 11) Amsterdam/AMS—London/ANY AIRPORT
- 12) Amsterdam/AMS—Copenhagen/CPH
- 13) Amsterdam/AMS—Rome/FCO & CIA
- 14) Amsterdam/AMS—Nice/NCE
- 15) Amsterdam/AMS—Barcelona/BCN
- 16) Dusseldorf/DUS—Barcelona/BCN
- 17) Munich/MUC—Barcelona/BCN
- 18) Munich/MUC—London/ANY AIRPORT
- 19) Berlin/ANY AIRPORT—Paris/CDG
- 20) Frankfurt/FRA—Rome/FCO & CIA
- 21) London/ANY AIRPORT—Paris/CDG
- 22) London/ANY AIRPORT—Nice/NCE
- 23) London/ANY AIRPORT—Copenhagen/CPH
- 24) London/ANY AIRPORT—Barcelona/BCN
- 25) London/ANY AIRPORT—Amsterdam/AMS
- 26) Paris/CDG—London/ANY AIRPORT
- 27) Paris/CDG—Frankfurt/FRA
- 28) Paris/CDG—Milan/ANY AIRPORT
- 29) Paris/CDG—Warsaw/WAW
- 30) Paris/CDG—Amsterdam/AMS
- 31) New York/JFK—London/ANY AIRPORT
- 32) New York/JFK—Paris/CDG
- 33) New York/JFK—Brussels/BRU
- 34) New York/JFK—Copenhagen/CPH
- 35) New York/JFK—Amsterdam/AMS
- 36) New York/JFK—Frankfurt/FRA

- Each test consisted of searching for international airfares. Booking criteria were established in advance.

For all four tests, these criteria included:

- Searching for lowest available fare
- One adult traveler
- Economy or coach class only
- Round-trip itinerary only
- Connecting flights acceptable
- Multiple-airline itineraries acceptable
- No special discounts or corporate rate programs of any kind (including government, military, AAA, AARP, senior, student, child, etc.)
- No frequent flyer program membership
- Specified airports only (unless otherwise noted)

- Specified dates only
- Flight times for any time of day acceptable for both departure and arrival

NOTE: Not all Web sites allowed such specificity for each test, but these parameters were established in advance to ensure consistency.

The nature of searching for international airfares required changes to established Consumer Reports WebWatch airline booking criteria for domestic flights. Specifically, this meant accepting 1) connecting flights in addition to non-stop and direct flights; 2) multiple-airline itineraries in addition to single-airline itineraries; and 3) departure and arrival times throughout the day. These changes were implemented to reflect the differences inherent in the airlines' international route structures, since many foreign destinations are served only once a day and/or require connecting flights to international gateways, either on the same carrier or on that carrier's marketing and code-sharing partner(s).

- In order to simulate a variety of trips, the advance booking windows varied. The booking times were:

- * TEST #1 (VERY SHORT ADVANCE BOOKING): 2 days in advance
- * TEST #2 (SHORT ADVANCE BOOKING): 7 days in advance
- * TEST #3 (MODERATE ADVANCE BOOKING): 14 days in advance
- * TEST #4 (LONGER ADVANCE BOOKING): 21 days in advance

- Because of the nature of international travel, Consumer Reports WebWatch departed from earlier methodology and did not simulate a variety of trips by varying the length of the stays with 2-day trips, 3-day trips, etc. However, all trips included a Saturday-night stay-over, which often reduces the cost of the airfare.

For this project, the stays were:

- TEST #1: 7 days
- TEST #2: 7 days
- TEST #3: 7 days
- TEST #4: 7 days

Selection of Results

As noted in previous reports, Consumer Reports WebWatch no longer analyzes the lowest fares based upon the first fare returned, a method previously employed by Consumer Reports WebWatch (and earlier employed by *Consumer Reports Travel Letter*). This is because most integrated travel Web site screens no longer resemble the vertical presentations pioneered by global distribution systems (GDSs) used by travel agencies, and the lowest fare is not always listed first. Indeed, with some screens, it's not always clear which position the "first" listing occupies.

In general, Consumer Reports WebWatch selected fares culled from either the first five returns or the first full page of returns, whichever was greater. The three integrated U.S. Web sites—Expedia, Orbitz, and Travelocity—offered both horizontal and vertical display tools.

Note that all rankings included ties. Therefore it was theoretically possible that for every fare query, every Web site tested could have provided the lowest airfare for that query.

A final note: Consumer Reports WebWatch testers were often provided with attractive fares that were outside the parameters of the query (e.g., \$20 less expensive for a flight departing on the next day, or from a nearby city). While the average consumer may very well opt to book such a fare, in all cases our testers only selected fares that were applicable to that specific itinerary. Selecting lower fares that did not adhere to these specifics would provide that Web site with an unfair advantage over other Web sites that were not queried outside the original itinerary.

Currency Issues

Once again, Consumer Reports WebWatch altered its previous methodology by tabulating total airfares that included all applicable taxes, fees, and booking costs. Previously, base fares and base rates were used in most cases.

There were two reasons for this change. 1) For most of these international airfare listings, only total fares were provided. Therefore, using total fares provided a better apples-to-apples comparison. 2) In many cases, total airfares included booking fees levied by the Web site itself. Therefore, using total fares provided a more accurate tabulation of a consumer's "bottom-line" cost.

Rounding of Fares

Consumer Reports WebWatch rounded the amounts of fares and rates provided in past travel Web site testing projects. Previously, amounts provided were rounded off to the nearest dollar for all airfares.

It was decided not to employ that methodology for this project, primarily because airfares were provided in four different currencies, and the conversion rates could shift if dollar amounts were rounded. Therefore, all analysis was conducted on amounts rounded to the nearest cent, not the nearest dollar.

Conversion Rates

This was by far the most complex online travel project ever undertaken by Consumer Reports WebWatch. In order to complete a comparative analysis of the results of these 20 travel Web sites, currencies had to be converted from four different monetary systems.

Here is a breakdown of those currencies:

- The three U.S. sites (Expedia, Orbitz, Travelocity), provided all fares in U.S. dollars (including fares provided by foreign airlines);

- The three U.K. sites (Expedia, Opodo, Travelocity) provided all fares in British pounds;
- The three Danish sites (Flybillet, Travellink, Travelstart) provided all fares in Danish kroner;
- The remaining 11 sites from Belgium, France, Germany, and The Netherlands provided all fares in European Union euros.

Consumer Reports WebWatch tabulated two complete sets of results for all 20 travel Web sites. The first set was comprised of all airfares in their original currencies, and then fact-checked for accuracy. The second set was comprised of all airfares (other than the airfares provided by the three American sites) converted into U.S. dollars, and then fact-checked for accuracy again.

The conversion rates were all obtained for the appropriate dates from a single source, x-rates.com (www.x-rates.com). All amounts were then rounded up or down to the nearest cent.

Here are the rates that were in effect for the testing dates:

- TEST #1, Monday, 14 June 2004
From British pound to US dollar: 1.8148 USD
From European Union euro to US dollar: 1.2073 USD
From Danish krone to US dollar: 0.16239 USD
- TEST #2, Tuesday, 15 June 2004
From British pound to US dollar: 1.8278 USD
From European Union euro to US dollar: 1.2139 USD
From Danish krone to US dollar: 0.163239 USD
- TEST #3, Wednesday, 16 June 2004
From British pound to US dollar: 1.8262 USD
From European Union euro to US dollar: 1.2006 USD
From Danish krone to US dollar: 0.161499 USD
- TEST #4, Thursday, 17 June 2004
From British pound to US dollar: 1.8341 USD
From European Union euro to US dollar: 1.204 USD
From Danish krone to US dollar: 0.161983 USD

Availability of Airfares

For this project, Consumer Reports WebWatch did not book any of the airfares provided. In all cases, the Web sites stated that the airline seats requested were available. When the airfare provided was not available, the next lowest fare that was available was used. In some cases, this meant that multiple fares repeatedly were not available for the same query. If no fare was available for that query, then this was recorded as well.

Valid Tests

All of the Web sites were evaluated solely on valid tests. If there was an error on the part of testers for Consumer Reports WebWatch or any of the other consumer organizations, this was deemed an invalid test. Invalid tests were eliminated and did not affect the final rankings. These errors included incorrect data entries such as travel dates or airport codes, insufficient returns of data, and/or printing errors.

The most serious errors occurred with Opodo/France. Only 29 queries for airfares were deemed to be valid, out of a maximum 144. Therefore Consumer Reports WebWatch determined that the results for Opodo/France were not statistically valid, and would not be included in the comparative rankings. However, for illustrative purposes, the results for Opodo/France were appended to most of the comparative rankings.

Invalid Data

Through no fault of the testers for Consumer Reports WebWatch and the other consumer organizations, many of these travel Web sites failed to provide valid data, even after all entries were completed properly on the part of the testers.

In some cases, these failures affected the Web site's final rankings. These could have been due to a variety of factors, including:

- The flight originated outside the site's home country.
- The flight's origin and/or departure city could not be processed.
- The booking window was too short for the site to process.
- The flight was not available on that date.
- The site stated: "Call Customer Service to process this itinerary."
- The airfare did not include all applicable taxes and fees.
- The site experienced technical or system failures.

Two travel sites were unable to process queries for routes that originated outside their home countries. One was an American travel site, Orbitz/USA. The site was capable of processing only those routes that originated in the United States, or just 24 of the 144 queries for this project. This limitation also afflicted Flybillet/Denmark.

Four travel sites could not process certain itineraries that were not among the select group of origin and departure cities available through the sites' booking tools. This feature limited their effectiveness. These four sites were Travelstart/Denmark, D-reizen/The Netherlands, Ebooker/The Netherlands, and Vliegtarieven/The Netherlands.

Six travel sites could not process some or all queries for TEST #1, because the itinerary contained a very short booking window of just two days in advance. These sites were Airstop/Belgium; Travelprice/Belgium; Travelstart/Denmark;

Expedia/The Netherlands; Vliegtarieven/The Netherlands; and Vliegwinkel/The Netherlands.

Technical or System Failures

During this project, testers experienced technical or system failures several times. In past projects for Consumer Reports WebWatch, such incidents often were temporary and did not prevent the tester from processing the queries. With this project, however, such failures affected the data provided by three travel sites.

These three sites were:

- BBLT/Belgium; two queries.
- D-reizen/The Netherlands; two queries.
- Travelstart/Denmark; two queries.

Testing Results, Rankings, and Conclusions

The comparative performance rankings produced by Consumer Reports WebWatch reflect months of intense preparation, testing, and analysis, and are among the key findings of this report. Although the larger problems and concerns uncovered by this project remain at the forefront, there's no doubt that consumers also want side-by-side results.

The findings of Consumer Reports WebWatch's global airline Web site testing are presented in the attached figures and are described below. There are six major categories of rankings:

- 1) Lowest fares for all tests;
- 2) Closest fares for all tests;
- 3) Lowest fares for each of the four individual tests;
- 4) Lowest fares for all tests by sites with a minimum of 100 valid queries;
- 5) Lowest fares for all tests by country of sites;
- 6) Lowest fares only among English-language U.S. and U.K. sites

The results are detailed in Figures 2 through 11.

It's important to note that all rankings included ties. Therefore it was theoretically possible that every Web site tested could have provided the lowest airfare when queried.

Lowest Fares for All Tests

The most important rankings reflect each travel Web site's ability to provide lowest airfares in head-to-head competition with all of their rivals. Figure 2 reflects these rankings.

The chart revealed several interesting findings, including:

- The best performance ever recorded by Consumers Union for a travel Web site providing lowest airfares;
- Poor showings in the rankings by the English-language travel Web sites based in the U.K. and the U.S.;
- An extremely wide range in performance between the first-ranked and last-ranked sites.

Figure 2: Lowest International Airline Fares (includes ties)

Rank	Web Site	Country	% of Lowest Fares Provided	Number of Lowest Fares Provided	Number of Valid Queries Performed
1	Travelprice	Belgium	49%	53	108
2	Flybillet	Denmark	30%	6	20
3	Opodo	Germany	27%	39	144
4	Airstop	Belgium	23%	25	108
5	Expedia	Germany	19%	28	144
6	Orbitz	USA	17%	4	23
7	D-reizen	Netherlands	16%	4	25
8	BBLT	Belgium	14%	15	109
9	Vliegtarieven	Netherlands	11%	2	18
10	Opodo	UK	9%	13	141
11	Travelocity	USA	5%	7	143
12	Expedia	Netherlands	4%	4	108
13	Expedia	USA	3%	5	144
14	Travelocity	UK	3%	4	140
15	Vliegwinkel	Netherlands	2%	2	108
16	Travelstart	Denmark	2%	1	50
17	Travellink	Denmark	1%	2	144
18	Expedia	UK	1%	1	141
19	Ebookers	Netherlands	0%	0	36
NOT RANKED	Opodo	France	41%	12	29

As indicated in Figure 2, Travelprice/Belgium ranked first among all 19 travel Web sites. With 108 valid queries, Travelprice provided the lowest fare 53 times, for a rate of 49%. This project revealed many interesting findings, but one of the most interesting was this remarkable performance.

To provide perspective, Travelprice/Belgium posted the highest percentage of lowest airfares ever recorded during any of the seven travel Web site testing projects conducted by Consumer Reports WebWatch and/or *Consumer Reports Travel Letter* between 2000 and 2004. Higher percentages of lowest rates were recorded only in the car rental sector, but never in the airline sector.

Therefore Travelprice/Belgium, a French- and Dutch-language site likely unknown to Americans, emerged as one of the biggest surprises of this testing project.

Flybillet/Denmark ranked a distant second, by providing the lowest airfares 30% of the time. However, Flybillet's performance was based on a smaller sampling of

test results (6 lowest fares among 20 valid queries), through no fault of the tester. Later in this section, the rankings are re-ordered to eliminate sites with small samplings, such as Flybillet.

The third, fourth, and fifth rankings were closely grouped, with Opodo/Germany (27%), Airstop/Belgium (23%), and Expedia/Germany (19%). So the second-place through fifth-place rankings revealed travel sites that provided the lowest airfares between 2 to 3 times out of every 10 queries, while first-ranked Travelprice/Belgium provided the lowest airfare nearly 1 out of every 2 queries.

Thus the top five rankings were dominated by travel sites based in Belgium, Denmark, and Germany. For Americans wondering if better online travel deals are available outside the U.S., this project demonstrates that the answer is clearly: Yes. It's also clear bargains await U.S. shoppers who can successfully deal with the language and currency issues.

Orbitz/USA, which ranked sixth with 17%, led all English-language travel sites from the U.K. and the U.S. However, there is an important caveat: Orbitz/USA had a very small sampling (4 lowest fares among 23 valid queries) because the site was unable to process requests for itineraries that originated outside the United States.

Therefore, Americans, who are bombarded by multi-million-dollar, multimedia advertising campaigns in their home country claiming "lowest available fares" on leading U.S. sites, should note that the best performance posted by an English-language site was Opodo/UK, which ranked tenth with 9%. The best performance posted by a U.S. site other than Orbitz was Travelocity/USA, which ranked 11th with 5%.

The remaining three English-language travel sites did not perform well at all. Expedia/USA ranked 13th with 3%, Travelocity/UK ranked 14th with 3%, and Expedia/UK ranked 18th with 1%.

For most Americans who speak English and are likely to book only through sites based in the U.S. and/or the U.K., the poor showings posted by these sites are not good news. However, there is a more thorough analysis of the six Anglo-American travel sites on page 35.

It's also intriguing to speculate whether Orbitz, which posted such a strong showing on international routes originating in the United States, would post an equally strong showing on international routes originating in other countries. It remains to be seen if Orbitz, founded by the five largest U.S. airlines, will maintain a similar posture after the completion of its recent acquisition by Cendant.

Among the remaining sites in the second tier of the comparative rankings, the best performances were posted by D-reizen/The Netherlands (16%) and

BBLT/Belgium (14%). But it's important to note that BBLT had a much higher sampling than D-reizen (109 to 25 valid queries).

As shown in Figure 2, it's also worth noting the poor performance recorded by more than half of the 19 travel sites. Ten sites provided lowest airfares in single-digit percentages. Two sites (Travellink/Denmark and Expedia/UK) provided lowest airfares 1% of the time and one site (Ebookers/The Netherlands) provided no lowest airfares at all, among 36 valid queries.

These 10 sites with single-digit performances included all five U.K. and U.S. travel sites other than Orbitz/USA.

This high number of poor showings was just as surprising as the strong performance posted by Travelprice/Belgium. The rankings indicate that this testing project produced two very distinct and segregated groupings between sites that were quite adept at providing lowest airfares and sites that were quite feeble at this task. And the 49-point spread in percentage between Travelprice/Belgium and Ebookers/The Netherlands—sites in two countries that share a common border, where travelers sometimes commute between each other's airports for cheaper flights—was surprisingly high.

It's important to state that this project revealed some polarities between sites that ranked very high in providing lowest airfares and sites that—due to larger marketing, public relations, and advertising budgets—may be better known to European or even American consumers. This is a finding Consumer Reports WebWatch has uncovered time and again: The best-known sites—those that spend enormous sums of money marketing claims to consumers—are not always the best. These findings demonstrate Consumer Reports WebWatch's long-standing advice to consumers: Shop around.

Closest Fares for All Tests

The rankings of travel Web sites providing the highest percentage of lowest fares are the primary indicators of each site's performance. However, it's important to note that for many itineraries, some sites often came close yet still did not exactly match the lowest fare. This has been true in each of Consumer Reports WebWatch's online testing projects, just as it is true in real-world scenarios for millions of consumers each day.

That's why it's important that these rankings also include a category for "closest" fares. It's a fair way to determine which travel sites consistently provided **low** fares, even if they were not always the **lowest** fares. Since the online travel market is so competitive, and since the best deals are often (intentionally) priced just a few pennies less than comparable deals on rival sites, such a measurement is critical. Therefore consumers who are searching for a lowest rate can broaden their travel options without effectively increasing their budget.

Consumer Reports WebWatch felt the inclusion of closest fares was even more important for this global project, due to the conversion of several foreign currencies. In this case, the closest rate was determined to be \$5.00 (USD). This amount accurately reflected fares that were close, but not so high that they were no longer competitive. This amount also offset any possible differences due to currency conversions.

As indicated in Figure 3, the inclusion of closest airfares forces a re-examination of the rankings. Some travel Web sites performed better, some performed worse, and some performed the same.

The most striking finding was that Travelprice/Belgium retained its dominance over all the other 18 sites. Once again, Travelprice ranked first, albeit by 11 percentage points rather than 19 points. In 56% of all cases, Travelprice provided lowest and closest fares combined. This simply underscored the Belgian site's remarkable showing.

The closest fares rankings revealed other interesting findings. A few sites—particularly BBLT/Belgium and Opodo/UK—ranked very high when closest fares were combined with lowest fares, providing a new dimension to their competitiveness. Conversely, a few sites—particularly Flybillet/Denmark and Airstop/Belgium—fell in the rankings, because although they were very good at providing lowest fares they were not very competitive overall for itineraries when they did not provide **the** lowest fare.

Thus there were many changes in the lowest-fare rankings when closest fares were combined with lowest fares. This was particularly true for the top tier of rankings. Opodo/Germany moved from third to second; Expedia/Germany moved from fifth to third; BBLT/Belgium moved from eighth to fourth; and Opodo/UK moved from tenth to fifth. Thus when closest fares were combined with lowest fares, the top five spots in the rankings were dominated by sites based in Belgium, Germany, and the UK.

The worst downward dips in rankings occurred with three sites. Flybillet/Denmark fell from second to eighth; Airstop/Belgium also fell out of the top five, from fourth to sixth; and D-reizen/The Netherlands fell from seventh to ninth. What is the significance for consumers? Simply that the strong performances posted by these sites were tempered somewhat when closest fares were included in the mix. If the absolute lowest fare is all that matters, then these sites are still among the leaders. But if a shopper is looking for a site that is always **among** the fare leaders, then there are other sites that should be considered first.

Figure 3: Lowest and Closest International Airline Fares (within US\$5) (includes ties)

Rank with Lowest Fares	Rank with Lowest and Closest Fares	Web Site	Country	Number of Lowest Fares Provided	Number of Closest Fares Provided	Number of Lowest and Closest Fares Provided	Number of Valid Queries Performed	% of Lowest and Closest Fares Provided
1	1	Travelprice	Belgium	53	7	60	108	56%
3	2	Opodo	Germany	39	26	65	144	45%
5	3	Expedia	Germany	28	31	59	144	41%
8	4	BBLT	Belgium	15	28	43	109	39%
10	5	Opodo	UK	13	40	53	141	38%
4	6	Airstop	Belgium	25	14	39	108	36%
6	7	Orbitz	USA	4	3	7	23	30%
2	7	Flybillet	Denmark	6	0	6	20	30%
7	9	D-reizen	Netherlands	4	1	5	25	20%
9	10	Vliegtarieven	Netherlands	2	1	3	18	17%
11	11	Travelocity	USA	7	5	12	143	8%
13	12	Expedia	USA	5	4	9	144	6%
12	13	Expedia	Netherlands	4	1	5	108	5%
14	14	Travelocity	UK	4	0	4	140	3%
15	14	Vliegwinkel	Netherlands	2	1	3	108	3%
16	16	Travelstart	Denmark	1	0	1	50	2%
17	17	Travellink	Denmark	2	0	2	144	1%
18	17	Expedia	UK	1	0	1	141	1%
19	19	Ebookers	Netherlands	0	0	0	36	0%
NOT RANKED	NOT RANKED	Opodo	France	12	7	19	29	66%

With the exception of the improvements posted by BBLT/Belgium and Opodo/UK, there was little movement in the lower tiers of the rankings. That is, those sites that were not adept at providing lowest fares were affected neither positively nor negatively when closest fares were combined with lowest fares.

The strong showing by Opodo/UK is good news for Americans likely to shop only on English-language sites. But there was little change in the rankings among the other five English-language sites. Orbitz/USA fell from sixth to seventh; Travelocity/USA retained the same 11th position; Expedia/USA moved up from 13th to 12th; Travelocity/UK retained the same 14th position; and Expedia/UK retained the same 18th position.

Consumer Reports WebWatch strongly recommends that consumers analyze both Figure 2 and Figure 3 when determining which sites are most likely to provide a low international airfare.

Lowest Fares for Each of the Four Individual Tests

When analyzing the rankings of these 19 travel sites, the emphasis should rightly be placed on the cumulative results for the entire testing period, which in this case consisted of 144 queries for airfares. However, although all other aspects of the testing project remained the same, there was one key difference among the four separate testing periods: the date of departure.

As noted, this project consisted of four separate tests, conducted on four consecutive days, with identical routes and travel Web sites. However, the booking windows for these itineraries changed as follows:

- TEST #1: 2 days in advance
- TEST #2: 7 days in advance
- TEST #3: 14 days in advance
- TEST #4: 21 days in advance

A closer analysis of the separate tests revealed even more surprises. The results from each of the four tests varied widely and key differences emerged among some of the leading travel sites.

Figures 4 through 7 detail each of the results in order for TEST #1 through TEST #4.

- Results for TEST #1 (booking 2 days in advance)

Figure 4: Lowest International Airline Fares for Test #1 (2 days in advance) (includes ties)

Rank	Web Site	Country	% of Lowest Fares Provided	Number of Lowest Fares Provided	Number of Valid Queries Performed
1	D-reizen	Netherlands	40%	2	5
1	Flybillet	Denmark	40%	2	5
3	Orbitz	USA	33%	2	6
4	Opodo	Germany	31%	11	36
5	Opodo	UK	18%	6	33
6	BBLT	Belgium	14%	5	36
7	Travelocity	UK	9%	3	33
8	Expedia	Germany	8%	3	36
9	Travelocity	USA	6%	2	36
10	Expedia	UK	3%	1	34
10	Expedia	USA	3%	1	36
10	Travellink	Denmark	3%	1	36
13	Airstop	Belgium	0%	0	0
13	Expedia	Netherlands	0%	0	0
13	Travelprice	Belgium	0%	0	0
13	Travelstart	Denmark	0%	0	0
13	Vliegtarieven	Netherlands	0%	0	0
13	Vliegwinkel	Netherlands	0%	0	0
13	Ebookers	Netherlands	0%	0	4
NOT RANKED	Opodo	France	60%	3	5

These results were the most surprising among all four separate tests. Clearly this was due to the extremely short booking window of 48 hours. Some sites that did not perform well overall performed very well on short-notice bookings; conversely, some sites that did perform well overall did not do so with these departure dates.

As seen in Figure 4, the most striking finding was that Travelprice/Belgium ranked last (in a seven-way tie) and failed to provide even a single lowest fare. Contrast this with TEST #2 through TEST #4, in which Travelprice ranked first, second, and first respectively.

In fact, Travelprice's outstanding performance by ranking first overall was even more impressive because it was achieved without any valid queries in TEST #1, which represented 25% of all results. This was because Travelprice/Belgium was not capable of processing bookings on such short notice.

This was also true for five of the other six travel sites that were unable to process flights with short booking windows. In addition to Travelprice/Belgium, these sites were Airstop/Belgium; Travelstart/Denmark; Expedia/The Netherlands; Vliegtarieven/The Netherlands; and Vliegwinkel/The Netherlands. Of the sites that did not provide any lowest fares for TEST #1, only Ebookers/The Netherlands was capable of processing such bookings, but failed to do so with four valid queries.

The two travel sites that proved to be best at providing lowest fares two days in advance were D-reizen/The Netherlands and Flybillet/Denmark at 40% (two lowest fares with five valid queries). They were followed by Orbitz/USA at 33% (two lowest fares with six valid queries). Therefore the sites that ranked in the top three did not process very many of the 36 queries included in this test.

Therefore it's important to note that the performance of Opodo/Germany, which ranked fourth at 31% was the most impressive showing for this individual test. Opodo/Germany led all 19 sites by providing 11 lowest fares, with the maximum number of 36 queries. This site comfortably led all other sites that processed all or most of the queries for TEST #1.

Other sites that ranked well in this test were Opodo/UK (18%); BBLT/Belgium (14%); Travelocity/UK (9%); Expedia/Germany (8%); and Travelocity/USA (6%).

On the opposite side, Airstop/Belgium was a site that ranked fourth overall for the entire project, but tied for last in TEST #1, due to its inability to process such short bookings.

As for American bookers, TEST #1 revealed more options for English-speaking consumers than the project did overall. Even discounting the strong performance by Orbitz/USA, which ranked third with a statistically small sampling, there were impressive postings by Opodo/UK, ranked fifth (18%); Travelocity/UK, ranked seventh (9%); and Travelocity/USA, ranked ninth (6%).

- Results for TEST #2 (booking 7 days in advance)

Figure 5: Lowest International Airline Fares for Test #2 (7 days in advance) (includes ties)

Rank	Web Site	Country	% of Lowest Fares Provided	Number of Lowest Fares Provided	Number of Valid Queries Performed
1	Travelprice	Belgium	47%	17	36
2	D-reizen	Netherlands	40%	2	5
3	Opodo	Germany	39%	14	36
4	BBLT	Belgium	20%	7	35
5	Orbitz	USA	17%	1	6
5	Vliegtarieven	Netherlands	17%	1	6
7	Airstop	Belgium	14%	5	36
8	Opodo	UK	11%	4	36
9	Expedia	Germany	8%	3	36
10	Expedia	USA	3%	1	36
10	Travelocity	UK	3%	1	36
12	Flybillet	Denmark	0%	0	5
12	Travelstart	Denmark	0%	0	10
12	Ebookers	Netherlands	0%	0	11
12	Expedia	UK	0%	0	35
12	Travelocity	USA	0%	0	35
12	Expedia	Netherlands	0%	0	36
12	Travellink	Denmark	0%	0	36
12	Vliegwinkel	Netherlands	0%	0	36
NOT RANKED	Opodo	France	67%	4	6

The rankings for TEST #2 were more consistent with the overall rankings for the entire project. This undoubtedly was due to the fact that six travel Web sites were unable to process short bookings two days in advance for TEST #1, but all 19 sites were able to process requests for TEST #2 through TEST #4.

The booking window of seven days in advance for TEST #2 is fairly common for airline reservations, though less so for international routes, which are often booked further in advance than domestic flights.

As Figure 5 shows for TEST #2, Travelprice/Belgium ranked first at 47%, and led all 19 sites by providing 17 lowest fares. D-reizen/The Netherlands ranked second, but with a very small sampling of two lowest fares with just five valid queries out of a maximum of 36.

More impressive was the showing of Opodo/Germany, which ranked third at 39%, with 14 lowest fares and 36 valid queries. Also worth noting is the

performance of BBLT/Belgium, which ranked fourth with seven lowest fares and 35 valid queries.

The best performances recorded by English-language sites were Orbitz/USA, ranked fifth (17%), and Opodo/UK, ranked eighth (11%). The remaining four American and British sites did not perform well.

- Results for TEST #3 (booking 14 days in advance)

TEST #3 consisted of a booking window of 14 days, more common for international routes. The results for this test can be seen in Figure 6.

Figure 6: Lowest International Airline Fares for Test #3 (14 days in advance) (includes ties)

Rank	Web Site	Country	% of Lowest Fares Provided	Number of Lowest Fares Provided	Number of Valid Queries Performed
1	Flybillet	Denmark	60%	3	5
2	Travelprice	Belgium	44%	16	36
3	Airstop	Belgium	25%	9	36
3	Expedia	Germany	25%	9	36
3	Opodo	Germany	25%	9	36
6	Travelocity	USA	11%	4	36
7	BBLT	Belgium	9%	3	33
8	Expedia	Netherlands	6%	2	36
8	Expedia	USA	6%	2	36
8	Vliegwinkel	Netherlands	6%	2	36
11	Travelstart	Denmark	5%	1	19
12	Opodo	UK	3%	1	36
13	Orbitz	USA	0%	0	5
13	Vliegtarieven	Netherlands	0%	0	6
13	D-reizen	Netherlands	0%	0	9
13	Ebookers	Netherlands	0%	0	10
13	Travelocity	UK	0%	0	35
13	Expedia	UK	0%	0	36
13	Travellink	Denmark	0%	0	36
NOT RANKED	Opodo	France	33%	2	6

The rankings require further explanation. Flybillet/Denmark ranked first, with an impressive 60%, representing the highest percentage recorded by any travel site for any of the four tests. But this was accomplished with just three lowest fares and five valid queries.

More noteworthy was the performance of Travelprice/Belgium, which ranked first in TEST #2 and TEST #4, and first overall for lowest fares as well as lowest and closest fares combined. For TEST #3, Travelprice ranked second at 44%, with 16 lowest fares and the maximum 36 valid queries.

Other strong performances came from three travel sites that engaged in a three-way tie for third place at 25%, with 9 lowest fares and 36 valid queries each. These three sites were Airstop/Belgium, Expedia/Germany, and Opodo/Germany.

A surprising result for TEST #3 was Travelocity/USA, which ranked sixth at 11%, with 4 lowest fares and 36 valid queries. Expedia/USA also performed well, by ranking ninth with 6%. Opodo/UK ranked twelfth at 3%.

Unfortunately, the remaining three English-language sites did not provide any lowest fares: Orbitz/USA at 0%, Travelocity/UK at 0%, and Expedia/UK at 0%.

But the good news for Americans is that this test produced the best results for U.S. sites.

- Results for TEST #4 (booking 21 days in advance)

As with TEST #3, the booking window of 21 days in advance for TEST #4 is more common for international routes. Figure 7 contains the results.

**Figure 7: Lowest International Airline Fares for Test #4 (21 days in advance)
(includes ties)**

Rank	Web Site	Country	% of Lowest Fares Provided	Number of Lowest Fares Provided	Number of Valid Queries Performed
1	Travelprice	Belgium	56%	20	36
2	Expedia	Germany	36%	13	36
3	Airstep	Belgium	31%	11	36
4	Flybillet	Denmark	20%	1	5
5	Orbitz	USA	17%	1	6
5	Vliegtarieven	Netherlands	17%	1	6
7	Opodo	Germany	14%	5	36
8	Expedia	Netherlands	6%	2	36
8	Opodo	UK	6%	2	36
10	Expedia	USA	3%	1	36
10	Travellink	Denmark	3%	1	36
10	Travelocity	USA	3%	1	36
13	BBLT	Belgium	0%	0	5
13	D-reizen	Netherlands	0%	0	6
13	Ebookers	Netherlands	0%	0	11
13	Travelstart	Denmark	0%	0	21
13	Expedia	UK	0%	0	36
13	Travelocity	UK	0%	0	36
13	Vliegwinkel	Netherlands	0%	0	36
NOT RANKED	Opodo	France	25%	3	12

Travelprice/Belgium once again ranked first at 56%, the highest percentage recorded by that travel site in any of the four tests. And the total of 20 lowest fares with 36 valid queries provided by Travelprice/Belgium was the highest number of lowest fares from any travel site for any of the four individual tests.

There were two other very strong performances recorded in this test, which contained the longest booking window. Expedia/Germany ranked second at 36% (13 lowest fares with 36 valid queries) and Airstop/Belgium ranked third at 31% (11 lowest fares with 36 valid queries).

As Figure 7 shows, there were other strong rankings, but several were due to much smaller statistical samplings. Once again, there were many sites—seven in all—that failed to provide even one lowest fare.

This test's results were mixed for American consumers. Orbitz/USA performed well by ranking fifth at 17%, but it provided one lowest fare with a small sampling

of just six valid queries. Opodo/UK tied for eighth at 6% (two lowest fares with 36 valid queries) and both Expedia/USA and Travelocity/USA ranked ninth at 3% (one lowest fare with 36 valid queries). Expedia/UK and Travelocity/UK both failed to provide any lowest fares.

- Results for all four tests

As shown above, the overall rankings and results for this project varied significantly when examined on an individual basis for the four separate tests. This was undoubtedly due to the one significant variable among the four tests: the length of the booking window used for the itineraries.

Online shoppers for international flights who are considering using one of these travel Web sites would do well to examine the individual test results that most closely suit their own booking window. This is particularly true for Americans contemplating a reservation on one of the six English-language travel sites, since their individual and collective performance varied by test and booking window.

Lowest Fares for All Tests by Sites with a Minimum of 100 Valid Queries

As previously noted, the results for Opodo/France were discounted and the site was not ranked with the other 19 travel sites because Consumer Reports WebWatch determined that 29 valid queries out of a possible 144 was not statistically valid. The poor sampling was primarily due to errors on the part of the tester.

That said, it should be noted that among the remaining 19 sites, there were six sites that also had smaller numbers of valid queries. The key difference was that this was not due to tester errors, but to various shortcomings on the part of the sites. As noted in the Methodology section (see page 17), some sites were unable to provide airfares for a variety of reasons, including the inability to process certain departure dates, the inability to process certain itineraries, and technical difficulties.

Therefore, in an effort to hone these results even further, these six sites were removed from the rankings to make a better apples-to-apples comparison. Figure 8 contains the readjusted rankings for 13 sites, each with a minimum of 100 valid queries performed. (One hundred queries represents 69% of the total number of 144 queries.) The six sites eliminated were Flybillet/Denmark; Orbitz/USA; D-reizen/The Netherlands; Vliegtarieven/The Netherlands; Travelstart/Denmark; and Ebookers/The Netherlands.

Figure 8: Lowest International Airline Fares Provided by Sites with a Minimum of 100 Valid Queries (includes ties)

Rank	Web Site	Country	% of Lowest Fares Provided	Number of Lowest Fares Provided
1	Travelprice	Belgium	49%	53
2	Opodo	Germany	27%	39
3	Airstop	Belgium	23%	25
4	Expedia	Germany	19%	28
5	BBLT	Belgium	14%	15
6	Opodo	UK	9%	13
7	Travelocity	USA	5%	7
8	Expedia	Netherlands	4%	4
9	Expedia	USA	3%	5
9	Travelocity	UK	3%	4
11	Vliegwinkel	Netherlands	2%	2
12	Travellink	Denmark	1%	2
12	Expedia	UK	1%	1

Obviously, the order for the remaining 13 sites remained the same. But the rankings did change dramatically. This is because four of the six deleted sites were ranked in the top ten of the more inclusive list.

With the adjusted rankings, Opodo/Germany then ranked second rather than third, behind Travelprice/Belgium. And BBLT/Belgium then ranked in the top five. In addition, Expedia/USA and Travelocity/UK, previously ranked 13th and 14th, moved into the ninth and tenth rankings. Thus, the two remaining U.S. sites, Expedia and Travelocity, both ranked in the top 10. (As previously noted, Orbitz/USA performed well overall by ranking sixth among all 19 sites, but its test sample of just 23 valid queries was due to the site's inability to process itineraries for flights originating outside the United States.)

Lowest Fares for All Tests by Country of Sites

Because the individual results posted by each travel site were analyzed so closely, an inevitable question arose: How did each of the participating countries rank overall? Because the number of sites tested by each country varied considerably, from two (Germany) to three (Belgium, Denmark, UK, USA) to five (the Netherlands), and excluding the one site tested by France, such results should be viewed in the context that the number of sites tested and the number of valid queries performed encompassed a wide range.

Figure 9 provides rankings by country.

Figure 9: Lowest International Airline Fares by Country of Sites (includes ties)

Country	Web Site(s)	% of Lowest Fares Provided	Number of Lowest Fares Provided	Number of Valid Queries Performed
Belgium	Airstop; BBLT; Travelprice	29%	93	325
Germany	Expedia; Opodo	23%	67	288
USA	Expedia; Orbitz; Travelocity	5%	16	310
UK	Expedia; Opodo; Travelocity	4%	18	422
Netherlands	D-reizen; Ebookers; Expedia; Vliegtarieven; Vliegwinkel	4%	12	295
Denmark	Flybillet; Travellink; Travelstart	4%	9	214
France (not included)	Opodo	41%	12	29

Among the six remaining countries (after the exclusion of France), Belgium ranked first by providing lowest fares 29% of the time. It was aided in large part by the performance of Travelprice, which ranked first among all sites in providing lowest fares. But all three Belgian travel sites—Airstop, BBLT, and Travelprice—performed well.

Germany ranked second by providing lowest fares 23% of the time. This was not surprising since both German sites—Expedia and Opodo—ranked among the top 5 of the 19 sites ranked.

Thus, on a country-by-country basis, Belgium and Germany were the only two stand-outs, with Belgian sites combining for the lowest fares in nearly three out of 10 cases and German sites combining for the lowest fares in nearly one out of 4 cases. The rankings of the remaining countries were not impressive.

The three U.S. sites—Expedia, Orbitz and Travelocity—combined to provide the lowest fares 5% of the time. Thus the United States ranked third among the six countries.

The other three countries all combined to provide the lowest fares 4% of the time each. This included the U.K. (Expedia, Opodo, and Travelocity), the Netherlands (D-reizen, Ebookers, Expedia, Vliegtarieven, and Vliegwinkel), and Denmark (Flybillet, Travellink, and Travelstart). Therefore, both of the two English-language countries—the U.K. and the U.S.—did not perform well when stacked alongside the other participating countries.

Once again, the slim results posted by Opodo/France raised intriguing questions (the site was included in Figure 9, but was not ranked). With just 29 valid queries performed, the site provided lowest fares 41% of the time, which would have ranked France first among all seven countries. But the statistical sampling was too small to confirm or deny such a ranking.

Lowest Fares Only Among English-Language U.S. and U.K. Sites

Consumer Reports WebWatch determined that a closer analysis of English-language travel sites would be beneficial for American consumers. For those who shop online only in English, 11 of the 20 travel Web sites analyzed for this global project were not viable alternatives.

Obviously the three U.S. sites (Expedia, Orbitz, and Travelocity) and three U.K. sites (Expedia, Opodo, and Travelocity) provided all information in English. However, three other travel sites that were tested also offered English translations. These were Airtop/Belgium, Ebookers/The Netherlands, and Vliegwinkel/The Netherlands.

A closer analysis of these three sites is offered on page 45. However, since the testing results for these three sites were not provided in English, they were not included in this closer analysis.

All three U.K. sites—Expedia, Opodo, and Travelocity—stated that they operate under British law and all transactions are subject to British rule. However, the sites did not prohibit electronic-ticket bookings by consumers in the United States. The sites do not ship paper tickets to customers with billing addresses outside the U.K, and it is important to note that many airfares online are available only as paper tickets.

Figures 10 and 11 provide deeper insights. For example, Figure 10 illustrates the performance of these six U.S. and U.K. travel sites, in the context of the overall rankings for all 19 travel sites.

Figure 11, however, breaks out these six sites and provides head-to-head comparisons only among themselves, thereby demonstrating how these American and English sites would have performed if no other sites had been tested. In effect, this is a completely different testing project, because it differentiates how these sites ranked in comparison only to each other, even

when other (non-English-language) sites provided much lower fares for given itineraries.

Figure 10: Lowest International Airline Fares by U.S. and UK Sites (includes ties)

Rank	Web Site	Country	% of Lowest Fares Provided	Number of Lowest Fares Provided	Number of Valid Queries Performed
6	Orbitz	USA	17%	4	23
10	Opodo	UK	9%	13	141
11	Travelocity	USA	5%	7	143
13	Expedia	USA	3%	5	144
14	Travelocity	UK	3%	4	140
18	Expedia	UK	1%	1	141

Figure 11: Lowest International Airline Fares Only Among U.S. and UK Sites (includes ties)

Web Site	Country	% of Lowest Fares Provided	Number of Lowest Fares Provided	Number of Valid Queries Performed
Opodo	UK	59%	83	141
Orbitz	USA	39%	9	23
Expedia	USA	16%	23	144
Travelocity	UK	11%	15	140
Travelocity	USA	8%	11	143
Expedia	UK	3%	4	141

As shown in Figure 10, these six sites did not perform well in competition with the non-English-language sites. In fact, no site based in the U.S. or the U.K. ranked in the top five for providing lowest fares.

Orbitz/USA led the English-language sites by ranking sixth with 17%. However, this was due to providing 4 lowest fares with just 23 valid queries. Because Orbitz/USA was unable to process travel bookings for itineraries that originated outside the U.S., the site had a small statistical sampling, and so must be viewed in that context.

The other five American and British sites did not suffer from this statistical problem, as the number of valid queries for these sites ranged from 140 to the maximum of 144.

Opodo/UK led these five sites by ranking tenth at 9%, with 13 lowest fares. Travelocity led the U.S. sites by ranking eleventh at 5%, with seven lowest fares. Expedia/USA (3%), Travelocity/UK (3%), and Expedia/UK (1%) all positioned in the second tier of the rankings.

For American bookers not restricted by language, currency or paper-ticket issues, and willing to consider any of the 19 sites ranked, these findings can be critically important.

For those Americans who would only consider an English-language site, Figure 11 contains key findings. The results provided by all six Anglo-American travel sites were re-examined solely in head-to-head competition with each other, to determine which sites performed best just amongst themselves.

As shown in Figure 11, it's clear that Opodo/UK was the clear leader, ranking first among the six sites at 59%. It provided 83 lowest fares with 141 valid queries, more than three times as many as the next site with as many queries.

Orbitz/USA ranked second at 39% and led all three U.S. sites in head-to-head competition. But the important caveat, of course, was that Orbitz/USA provided 9 lowest fares with just 23 valid queries, since the site was unable to process most itineraries due to its inability to book flights that originated outside the U.S. However, Orbitz/USA proved to be quite viable at providing lowest fares for flights from the U.S. to European destinations.

Expedia/USA ranked third at 16%, but effectively ranked second if the statistically small sampling generated by Orbitz/USA was discounted. Expedia/USA provided 23 lowest fares with 144 valid queries.

Travelocity/UK, Travelocity/USA, and Expedia/UK did not perform well, as indicated in Figure 11. Overall, these rankings varied somewhat from the rankings posted by these six travel sites when compared to all 19 sites tested.

Opodo/UK's performance was the most interesting finding of this closer analysis. Consumers who would only contemplate shopping or buying on an American or British travel site should remember that Opodo/UK provided the lowest fare nearly six times out of 10, leading its Anglo-American rivals by a comfortable margin.

Findings and Concerns

With each online travel project undertaken by Consumer Reports WebWatch, new findings and issues have arisen, many of which were not foreseen prior to testing. This project was no exception.

For almost two years, Consumer Reports WebWatch has raised concerns about credibility, transparency, and pricing claims issues among major travel Web sites. In the United States, the major travel sites have made considerable progress in addressing issues of preferred search placement, potential bias of search results by marketing agreements, and “preferred advertiser” placements. U.S. sites such as Travelocity and Orbitz have published pages on their site designed for consumers that detail those sites’ agreements with partners and suppliers, a critical step toward improved disclosure.

Unfortunately, some findings are a cause for concern, and in some cases, work still needs to be done.

This report’s findings and concerns can be grouped as follows:

- Pricing and display inaccuracies (such as “fare-jumping”);
- Exclusion of viable, low-fare airlines;
- Inaccurate or incomplete displays of taxes and/or fees;
- Limitations in booking capabilities (language, currency, and geography);
- Comparing results from sister sites;
- Comparing results on routes originating and not originating in sites’ home countries.

Pricing and Display Inaccuracies

Once again, Consumer Reports WebWatch uncovered a disturbing finding when analyzing the three major integrated U.S. travel sites—Expedia, Orbitz, and Travelocity. As in past testing projects, these three sites upon query in testing displayed inaccurate airfares that suddenly rose (and sometimes fell) in price, a phenomenon Consumer Reports WebWatch dubbed “fare-jumping.” In addition, some flights suddenly became unavailable for booking during the shopping process.

The pattern remained consistent with past results. In these tests, fare-jumping was a minor problem with Travelocity, a more serious problem with Expedia, and a chronic problem with Orbitz. In summation, airfares rose 4% of the time with Travelocity, 10% of the time with Expedia, and 39% of the time with Orbitz, though as noted, that site’s test sample was smaller because it does not allow booking of tickets from non-U.S. starting points.

This issue was discussed at length in the Consumer Reports WebWatch report “Global Concerns: An In-Depth Examination of Travel Web Sites Selling

International Airline Tickets,” published Sept. 22, 2004 (<http://www.consumerwebwatch.org/news/internationalairfare/index.html>). Responses from Expedia, Orbitz, and Travelocity to the fare-jumping issue were published in detail in that report.

Interestingly, testing for that project was completed in December 2003. The sites told Consumer Reports WebWatch these issues were being addressed in the interim. However, testing for this project took place in June 2004, and clearly remained a concern six months later.

Consumer Reports WebWatch conducted this analysis only of the six English-language travel sites tested for this project; the other 14 foreign sites were not specifically analyzed to determine if inaccurate displays were a concern. Interestingly, no examples of the problem occurred during testing of the three British sites (Expedia/UK, Opodo/UK, and Travelocity/UK).

What follows are detailed discussions of these issues.

- Notifications to users.

In recent reports, Consumer Reports WebWatch praised the three largest U.S. integrated travel sites for providing prompt notifications to consumers when pricing or itinerary information suddenly changed in the middle of the booking process. Previously, WebWatch urged these sites to provide such notices.

These notifications now have become standard. During testing, one of these sites—Expedia—failed to provide a notice when a fare suddenly increased, but this occurred in just one case; details are provided below. In all other cases, however, Expedia was prompt in providing a notice when critical information changed.

Consumer Reports WebWatch will continue to monitor this issue in future testing projects.

The display issues that arose with the three integrated U.S. travel Web sites are detailed below.

- Orbitz.

As noted in previous reports, Orbitz employed a “Matrix”™ display that provided airline, flight, and airfare information in both horizontal and vertical formats. (This Matrix is used for hotel and car rental products, in addition to airlines.) While this tool appears to be user-friendly, it’s unfortunate to note that much of the data contained within it are inaccurate.

Throughout 23 valid queries for airfares, Orbitz displayed a fare that suddenly increased in price nine times, or 39%. These increases ranged from \$3.23 to \$218.50, and averaged \$64.72.

In addition, the airfares initially displayed by Orbitz suddenly decreased in price three times, or 13%. These decreases ranged from \$2.00 to \$10.00, and averaged \$6.67.

In two cases, the initial fare increased and then decreased, but in both of these cases the final fare was still higher than the initial fare.

An important note: While it is clear that fare-jumping continued to be a problem on the Orbitz site throughout this testing project, it should be noted again that the testing sample for Orbitz was statistically much smaller than it had been in previous testing projects. This is because Orbitz was unable to provide airfares for flights departing outside the United States, and so was only eligible for 24 of the 144 fare queries.

In the worst scenario, for a flight from New York/JFK to London in TEST #3, the airfare increased by \$218.50, from \$569.00 to \$787.50. In fact, this was the highest fare increase posted by all three U.S. sites.

Both the increases and decreases occurred with a variety of airlines, and among combinations of airlines.

In all cases, Orbitz displayed a notification to the tester when the fare increased; when the fare decreased; when the flight was “not available” for booking or “no longer available for booking.”

- Expedia.

Expedia returned to testers valid airfares for all 144 queries. Of these, Expedia displayed a fare that suddenly increased in price 14 times, or 10%. These increases ranged from 44¢ to \$75.00, and averaged \$36.28.

Furthermore, airfares returned on query to testers by Expedia suddenly decreased in price 14 times, or 10%. These decreases ranged from \$7.38 to \$72.00, and averaged \$43.30.

In two cases, the airfare that was initially displayed first increased, and then decreased, but in both cases the final fare still was higher than the initial fare.

In the worst scenario, fares for three queries suddenly increased by \$75.00 each. In all three cases, this occurred in TEST #1, for flights from New York/JFK to Paris, New York/JFK to Brussels, and New York/JFK to Amsterdam. And in all three cases in which the fare suddenly rose by \$75.00, the airline was Aer Lingus.

An interesting pattern emerged with Expedia. For all 14 price decreases, the airline was KLM. The price increases, however, occurred with a variety of airlines, including KLM.

Most disturbing, however, was the single case in which the airfare suddenly rose—in real-time, in the middle of the shopping process—but no notification was given to the tester. This was coupled with one of the highest price increases. This occurred in TEST #1, with a flight from New York/JFK to Brussels, when the initial fare displayed for an Aer Lingus flight was \$895.58, and it suddenly increased to \$970.58, a jump of \$75.00.

For all other queries when the fare suddenly increased or decreased, Expedia provided a notification for the tester. In some cases, this notice stated that the flight was not available. In other cases, this notice stated that there was a “problem” with the flight.

- Travelocity.

Travelocity provided a valid airfare for 143 of the 144 fare queries. These fares suddenly increased in price six times, or 4%. The increases ranged from \$5.20 to \$170.40, and averaged \$98.48.

In no cases did the airfares provided by Travelocity suddenly decrease.

In the worst scenario for Travelocity, an airfare suddenly increased in TEST #3, for a British Airways flight from New York/JFK to Copenhagen, from \$975.00 to \$1145.40, a jump of \$170.40.

Overall, fare increases occurred with a variety of airlines, and combinations of airlines.

In every case, Travelocity provided a notification to the tester when a fare increased. These notices either stated that the price had changed or that the site was “unable to confirm the selection.” In one case, the initial fare and the second fare were both unable to be confirmed, and a third fare was selected.

Exclusion of Viable, Low-Fare Airlines

In preparing for this testing project, Consumers Union received invaluable assistance from Consumers International in researching the online European travel market. That research in itself yielded striking findings.

The U.S. market is clearly dominated by the “Big Three” integrated sites—Expedia, Orbitz, and Travelocity. By contrast, the British and European markets offered consumers more choices from a wider variety of third-party integrated travel sites. Each of these sites commanded smaller slices of the overall pie than their American rivals.

This project clearly shows that the European online airline market is extremely competitive. Overall, this would seem to be good news for consumers. The key question is, how well are consumers served by these integrated travel sites in

comparison to other booking channels? The absence of low-fare airlines that choose not to participate in third-party integrated travel sites is an issue in the United States and Europe.

To better understand the dynamic European market, it's important to recognize that the granddaddy of all low-cost, low-fare air carriers worldwide is Southwest Airlines, which began flying from its base in Dallas in 1971. For more than 30 years, Southwest has served as a role model for low-fare start-ups, and it has been emulated on several continents. Nowhere in the world are there more Southwest imitators than in Europe today.

A key component in the Southwest low-cost strategy is to continually strive to reduce sales distribution costs, one of the few pliable expenses on an airline's ledger. This is why it's impossible to understand the online airline market in the United States without considering that Southwest and one of its most successful disciples—New York City-based JetBlue Airways—both have opted to primarily sell their seats directly through their own branded Web sites, and have eschewed third-party integrated travel Web sites. Rather than being hurt by such strategies, both carriers have flourished under them. In fact, Southwest's ability to spur new air travel demand when it enters a market generated a phenomenon dubbed "The Southwest Effect" by the U.S. Department of Transportation in 1993.

Now the Southwest Effect may be thriving even more strongly in Europe. For decades, the European air market was dominated by flag carriers, which were often subsidized by their home states. In the past, airfares remained high and rail or bus travel was the short-haul choice for most intra-European trips. But in the last decade, the entire continent has been transformed, as literally dozens of low-cost, short-haul airlines have found success by offering low fares throughout the United Kingdom and the European Continent.

So just as the American online travel market is not complete without key players such as Southwest and JetBlue, so too is the European online travel market incomplete without many of that market's most viable low-fare airlines. Some of these carriers, it should be stated, are subsidiaries of major European airlines (just as in the American market; for example, Song is a subsidiary of Delta Air Lines).

The major trade organization for these carriers is the European Low Fares Airline Association (www.elfaa.com). Currently there are 11 members. They are:

- Air-Berlin
- Basiq Air
- Flybe
- Hapag-Lloyd
- Kullaflyg
- Ryanair
- SkyEurope
- Sterling
- Transavia

Volare
Wizz Air

Amazingly, only four of these 11 low-fare airlines provided even one lowest fare for the maximum 144 queries compiled by all 20 of the travel Web sites tested for this project. The seven carriers that did not provide any lowest fares during these tests were:

Flybe
Hapag-Lloyd
Kullaflyg
Ryanair
SkyEurope
Transavia
Wizz Air

It's important to note that Ryanair is one of the largest low-fare airlines not only in Europe, but the world, and it did offer flights on some of the itineraries tested.

For American shoppers uncertain about the European market, there are tools that can offer assistance. For example, WhichBudget (www.whichbudget.com) is a site that offers consumers a user-friendly way to determine which budget airlines operate on routes throughout Europe. The site provides a detailed option for matching origin airports and destination airports to determine in advance what low-fare airline choices are available on a given route. Consumer Reports WebWatch input all 36 itineraries used for this testing project and compared the airlines offered by WhichBudget with the lowest-fare airlines provided by all 20 travel sites for the entire project.

Surprisingly, there were many omissions of carriers not provided by the 20 travel sites tested. In fact, WhichBudget offered at least one alternative airline choice not provided by any of the travel sites for 21 of the 36 itineraries (58%). There were two alternative airline choices for five of the 21 itineraries and three alternative airline choices for one of the 21 itineraries.

The airlines omitted by the 20 travel sites tested were:

Air-Berlin
Air Polonia
Basiq Air
BMI
easyJet
Niki
Snowflake
Sterling
Virgin Express
Vueling

It's important to note that these 10 airlines offered by WhichBudget were not provided for queries for specific itineraries by the 20 travel sites. However, six of

these 10 airlines were offered by one or more of the tested travel sites in response to queries for other itineraries. The four airlines offered by WhichBudget that did not provide any lowest fares for any query throughout the entire testing project were:

- Air Polonia
- Niki
- Snowflake
- Vueling

In addition to WhichBudget, there are two other sites which aggregate information on European low-fare airlines. It's important to note that some of these carriers provide public charter service rather than scheduled service. Even so, it's clear the leading third-party travel Web sites did not make available all fares from the viable low-fare airlines within Europe.

Openjet (www.openjet.com) offers seven air carriers and one of them—Germanwings—did not provide any lowest fares by any of the 20 travel sites tested. AppleFares (www.applefares.com) offers several carriers that did not provide lowest fares by any of the tested sites. These airlines include Air 2000, Air Scotland, Germanwings, Globespan, Jet2, SkyEurope, SkyNet, Thomsonfly, and the recently bankrupt V Bird.

Surprising as it may sound, there are still others. Europebyair (www.europebyair.com) offers an extensive list of additional European low-fare airlines that did not provide any lowest fares by any of the 20 travel sites tested.

It's obvious many low-fare choices simply were not available to our testers, despite the hundreds and hundreds of queries conducted during this testing project. This indicates that just as consumers cannot claim to have thoroughly examined low-fare airline options in the U.S. if they do not visit the branded sites of Southwest and JetBlue, so too it's apparent the leading European third-party integrated sites do not provide all the low-fare options available through some of the European low-fare airlines' own branded sites.

Inaccurate or Incomplete Displays of Taxes and/or Fees

During previous Consumer Reports WebWatch research projects of travel Web sites, inaccurate or incomplete displays of taxes and/or fees became a critical issue. Consumer Reports WebWatch has criticized several travel sites for not clearly labeling all taxes and surcharges, as well as fees levied by the site itself.

Happily, this project revealed that problem to be virtually non-existent, despite the abnormally large number of travel sites tested and queries processed. Overall, the problem of missing tax and/or fee information occurred with only one travel site, Travelstart/Denmark, and with a single query, for a flight from Copenhagen to Malaga.

Limitations in Booking Capabilities for Language, Currency, and Geography

The decision to simultaneously examine travel Web sites from seven different countries in a real-time setting inevitably uncovered restrictions. Built-in limitations of language, currency, and geography prevented some sites from being viable alternatives for American consumers.

- Language issues

This project clearly shows intriguing results of interest to an international audience. But it's equally true that each of the participating consumer organizations uncovered findings specifically interesting to their own national audiences.

By its very nature, a global testing project such as this encounters language barriers. That's why Consumer Reports WebWatch, in focusing on a predominately American audience, has highlighted findings among English-language travel sites. It's certainly true there are many Americans who may want to browse and/or buy on travel sites presented in Danish, Dutch, French, or German, and this report undoubtedly will aid them.

Obviously the three American travel sites (Expedia, Orbitz, and Travelocity) and the three British travel sites tested (Expedia, Opodo, and Travelocity) present all data in English. Clearly these will be among the first or perhaps only online travel choices for many Americans.

However, three of the other travel Web sites tested also offered English translations. One of these sites is Belgian (Airstop/Belgium) and the other two are Dutch (Vliegwinkel/The Netherlands and Ebookers/The Netherlands). It should be noted that in some cases, translations did not extend to all aspects of information presented on the site.

Ebookers/The Netherlands, for example, offered route and fare information in English, but most other critical information—including the site's privacy policy and security policy—was available only in Dutch. Consumer Reports WebWatch deemed that this prevented it from being a viable choice for American consumers. (However, it should be noted that there are sister Ebookers sites in the U.K. and other countries not included in this testing project.)

The other Dutch site, Vliegwinkel/The Netherlands, did offer critical information in English as well as Dutch. However, the travel site's dismal performance precluded it from being much of an option for most American travelers: Vliegwinkel provided only 2 lowest fares with 108 valid queries, ranking 15th among the 19 sites at 2%.

The only other viable site based outside the U.S. and the U.K. tested during this project was Airstop/Belgium. Not only did the site perform well—it ranked fourth overall at 23%—but all information was available in English as well as French.

Airstop/Belgium should be considered a viable alternative for many American shoppers. However, it was not included in head-to-head comparisons with the six other English-language sites based in the U.S. and the U.K. because its testing was conducted in Dutch, and Consumer Reports WebWatch provided this closer analysis only for the six sites tested in English.

- Currency issues

This project, which encompassed 20 travel Web sites based in seven different countries, consisted of four separate currencies. Americans considering using these European sites need to determine in advance if they are comfortable shopping and/or booking in foreign denominations.

The introduction of the euro by the European Union made this project somewhat easier, in that four of the six foreign nations included in this testing project have adopted the euro in recent years. However, neither Denmark nor the United Kingdom has abandoned its own monetary system.

Here is a breakdown of the currencies used for all calculations:

- The three travel sites based in the U.S. (Expedia, Orbitz, and Travelocity) offered all airfares in U.S. dollars.
- The three travel sites based in the U.K. (Expedia, Opodo, and Travelocity) offered all airfares in British pounds.
- The three travel sites based in Denmark (Flybillet, Travellink, and Travelstart) offered all airfares in Danish kroner.
- All of the remaining 11 sites based in Belgium, France, Germany, and the Netherlands offered all airfares in European Union euros.

For a detailed breakdown on the methodology employed by Consumer Reports WebWatch to convert these currencies, see page 15.

- Geographical issues

For American shoppers, the most critical limitation uncovered during this project concerned Orbitz/USA. On this site consumers cannot book flights on routes that originate outside the United States. Therefore Orbitz/USA was only capable of processing airfares for 24 of the 144 queries that constituted this testing project.

The issue of home countries also arose with another travel site based outside the U.S.: Flybillet/Denmark. Among the 36 routes selected for this project, the Danish site was only capable of processing queries for the five flights originating in

Copenhagen. Therefore, Flybillet's strong showing in providing lowest fares (ranked second overall at 30%), must be viewed in this context, since it produced only 20 valid queries out of a maximum 144.

Another geographical limitation arose during this project as well. This concerned four travel Web sites that could not process certain itineraries due to the origin city and/or departure city. These four sites were Travelstart/Denmark, D-reizen/The Netherlands, Ebooker/The Netherlands, and Vliegtarieven/The Netherlands. Obviously this restriction affected the number of valid queries for all four of these travel sites as well.

Comparing Results from Sister Sites

One of the most intriguing aspects of this cross-border project was the ability to compare the airlines and fares provided by sister Web site companies operating under the same name in different countries. To our knowledge, this was the first time an unbiased research organization examined such an issue.

For this project, Consumer Reports WebWatch and its European colleagues examined three sets of travel Web site "families" branded with the same name. In all, this encompassed a total of nine sites. They were:

- EXPEDIA
 - Germany
 - Netherlands
 - UK
 - USA

- OPODO
 - France
 - Germany
 - UK

- TRAVELOCITY
 - UK
 - USA

Specifically, the question many consumers want to know is: Are these sister Web sites providing the same information behind different home pages, and/or in different languages?

This project made clear that in all three cases Consumer Reports WebWatch examined, the answer was unequivocally no. Each set of sister sites offered wide variances in products and fares they provided for identical queries in a real-time setting.

This would seem to indicate that: 1) competition is indeed healthy within the online travel sector, even among sites operated by the same parent companies;

and 2) the consumer’s need to shop around should be extended even to the point of querying rates from sister sites if the itinerary involves international travel.

It’s important to reiterate that none of these sister sites had a methodological “advantage” over the others. This was because the itineraries used for this project were not weighted toward one country or another. As previously discussed, the departure cities used in these itineraries were evenly balanced among all the participating countries.

Figures 12 through 14 provide side-by-side rankings of these three sets of travel sites. What follows are breakdowns of the comparisons among all three groupings of sister sites.

- Expedia

As indicated in Figure 12, there were significant differences in the ability of each of the four Expedia sites to provide lowest airfares. By far, Expedia/Germany was the best, in that it produced lowest fares 19% of the time and ranked 5th overall among the 19 sites. It was distantly followed by Expedia/Netherlands (4%), ranked 12th; Expedia/USA (3%), ranked 13th; and Expedia/UK (1%), ranked 18th.

Figure 12: Lowest International Fares by Expedia Sites (includes ties)

Rank	Web Site	Country	% of Lowest Fares Provided	Number of Lowest Fares Provided	Number of Valid Queries Performed
5	Expedia	Germany	19%	28	144
12	Expedia	Netherlands	4%	4	108
13	Expedia	USA	3%	5	144
18	Expedia	UK	1%	1	141

The number of valid queries performed was quite close for three of these sites, so comparisons were particularly relevant among Expedia/Germany (144 queries), Expedia/USA (144 queries), and Expedia/UK (141 queries).

The fact that Expedia/Germany was able to provide lowest airfares nearly five times as often as its closest sister site was impressive. It’s also important to note no two of the four Expedia sites posted the same results overall.

A closer look at the test results exemplifies how varied those results were in some cases. In TEST #4, for example, Expedia/Germany ranked 2nd by providing the lowest fares 36% of the time; Expedia/Netherlands ranked 8th with 6%; Expedia/USA ranked 10th with 3%; and Expedia/UK ranked 13th with 0%. Thus the spectrum of results provided by Expedia sites for TEST #4 ranged from 13

lowest fares in 36 queries for Expedia/Germany to 0 lowest fares in 36 queries for Expedia/UK.

Often airline(s) offering the lowest fare for a given query varied from one Expedia site to another. But even when airline(s) did not vary, lowest fares usually did.

For example, one query in TEST #4 was for an itinerary from New York/JFK to Frankfurt. All four Expedia sites offered a lowest fare on Lufthansa. But the fares ranged from \$722.60 with Expedia/Germany to \$740.66 with Expedia/Netherlands, to \$743.73 with Expedia/UK, to \$761.97 with Expedia/USA, a range of almost \$40.

- Opendo

A comparison of results posted by the three Opendo sites can be seen in Figure 13. Once again, it's clear there were significant differences among these sister sites as well.

Figure 13: Lowest International Airline Fares by Opendo Sites (includes ties)

Rank	Web Site	Country	% of Lowest Fares Provided	Number of Lowest Fares Provided	Number of Valid Queries Performed
3	Opendo	Germany	27%	39	144
10	Opendo	UK	9%	13	141
NOT RANKED	Opendo	France	41%	12	29

Opendo/Germany ranked 3rd overall by providing lowest fares 27% of the time. Conversely, Opendo/UK ranked 10th overall and was successful in providing lowest fares only 9% of the time.

Opendo/Germany accomplished this by providing 39 lowest fares in 144 queries overall, compared to Opendo/UK, with 13 lowest fares in 141 queries overall. Thus, the German site was three times as successful as its British sister site.

As noted earlier, Opendo/France was not ranked with the other 19 sites because its sampling of valid queries was not statistically valid. However, it's worth noting that the site's performance was still impressive: it provided lowest fares 41% of the time, with 12 lowest fares in just 29 queries, a percentage that would have ranked 2nd overall had it been statistically valid.

But even though the results posted by Opendo/France were not tallied in the overall rankings, the individual fares provided were still of interest when comparing similarities and differences among the three Opendo sister sites.

In many cases, the lowest fares provided by all three Opodo sites were offered by the same airline, even though the fares themselves usually varied. In TEST #4, for example, all three Opodo sites offered a lowest fare from Alitalia for an itinerary from Paris/Charles de Gaulle to Warsaw. But the fares ranged from \$345.78 with Opodo/France, to \$383.10 with Opodo/Germany, to \$385.71 with Opodo/UK, a total range of nearly \$40.

- Travelocity

The closest results posted by any set of sister sites were those from the two Travelocity sites, as shown in Figure 14.

Figure 14: Lowest International Airline Fares by Travelocity Sites (includes ties)

Rank	Web Site	Country	% of Lowest Fares Provided	Number of Lowest Fares Provided	Number of Valid Queries Performed
11	Travelocity	USA	5%	7	143
14	Travelocity	UK	3%	4	140

Overall, Travelocity/USA ranked 11th overall, followed closely by Travelocity/UK, which ranked 14th. The U.S. site provided lowest fares 5% of the time, with 7 lowest fares in 143 queries, while the British site provided lowest fares 3% of the time, with 4 in 140 queries.

The two Travelocity sites were not at all similar in the airlines and fares they provided. In fact, the difference in fares between these two sister sites was often significant. And in no case among all 144 queries did Travelocity/USA and Travelocity/UK provide identical lowest fares—when one excelled for a particular itinerary, the other didn’t, and vice versa.

For example, in TEST #1, for an itinerary from New York/JFK to Amsterdam, Travelocity/USA provided a lowest fare of \$943.70 from Aer Lingus, while Travelocity/UK provided a lowest fare of \$1137.15, also from Aer Lingus, for a difference of more than \$193.

Conversely, in TEST #1, for an itinerary from Paris/Charles de Gaulle to Warsaw, Travelocity/UK provided a lowest fare of \$320.49 from Alitalia, while Travelocity/USA provided a lowest fare of \$551.10 from KLM. This represented a difference of nearly \$231.

- Overview of all three sets of sister Web sites

Each testing project undertaken by Consumer Reports WebWatch in recent years has made it clear that the influx of “Web-only” fares and rates has

transformed travel distribution. That is, integrated or third-party travel Web sites have been aggressive in pursuing (usually exclusive) arrangements with airlines, hotel properties, car rental firms, cruise lines, and other travel suppliers to offer discounted rates to consumers not available through traditional sales channels (such as brick-and-mortar travel agencies), and sometimes not even available through the suppliers' own branded Web sites. This is undoubtedly one of the most important developments in the short history of online travel sales.

Consumer Reports WebWatch's repetitive testing methods have clearly illustrated hundreds of cases in which one integrated travel site offered a clear price advantage over rival sites for a particular itinerary. In many of these cases, it seemed logical to conclude that this advantage was due to the presence of a "Web-only" negotiated rate.

Now it seems equally logical to conclude that sister travel sites operating under the same name in multiple countries are pursuing "Web-only" rates directly from airlines and other travel suppliers, independent of the actions of their sister companies. Among the Expedia, Opodo, and Travelocity families tested for this project, the differences in airlines offering the lowest fares from one sister site to another provided strong evidence that the sites were operating separately. The wide variances in the lowest airfares provided by these sister sites only confirmed this independence.

It's clear that at least as far as the Expedia, Opodo, and Travelocity names are concerned, consumers shopping for international airfares cannot claim to have exhausted the brand's inventory without looking at one or more of the sister sites.

Comparing Results on Routes in Sites' Home Countries

Several fundamental questions arose when Consumer Reports WebWatch began preparing for this global online travel project. One key question was: Do travel sites based in a given country offer consumers an advantage if the flight is departing from that country? In other words, are the best deals home-grown?

Based on an extensive analysis of all the data generated by this project, the answer clearly is yes. Further, a consumer is twice as likely to find a lowest fare if the itinerary in question originates in the home country of that travel Web site. In fact, only one site among the 19 tested was not able to provide lower airfares for flights departing from its home country, when compared to all flights overall.

Simply put, the best practical advice to give a consumer surfing from one international Web site to another is: When possible, consult with at least one site based in the country of the itinerary's origin.

This is one of the most intriguing conclusions to emerge from this testing project. It's also the primary reason care was taken to select the itineraries used for these tests, to ensure a balanced number of flights would originate in each of the countries being tested.

These findings are illustrated in Figures 15 through 17.

As Figure 15 indicates, the collective performance of all 19 travel Web sites was cumulatively added. (Once again, this excluded Opodo/France, due to a statistically invalid sampling.) The total number of lowest fares including ties provided overall was 215, while the total number of valid queries overall was 1,854. For all 19 sites, this produced a total percentage of providing lowest fares of 12%.

Figure 15: Summary of Lowest International Airline Fares Overall and on Routes Originating in Sites' Home Countries

All Web Sites Combined (excluding Opodo/France)	Number of Lowest Fares Provided Overall	Number of Valid Queries Performed Overall	%	Number of Lowest Fares Provided on Routes Originating in Sites' Home Countries	Number of Valid Queries Performed on Routes Originating in Sites' Home Countries	%
19 sites	215	1854	12%	79	351	23%

However, the total number of lowest fares including ties provided on routes originating in the home countries of the 19 sites was 79, while the total number of valid queries was 351. This produced a total percentage of 23%. This was nearly twice the total percentage of 12% collectively achieved overall.

Figures 16 and 17 break down these totals for each of the 19 travel Web sites.

Figure 16 illustrates the number of lowest fares provided and number of valid queries performed for all 19 travel sites for routes originating in each of their home countries. For the most part, these rankings were similar to the overall rankings for all 19 travel sites, when compared for providing the highest percentage of lowest fares.

Figure 16: Lowest International Airline Fares on Routes Originating in Sites' Home Countries (includes ties)

Rank	Web Site	Country	% of Lowest Fares Provided	Number of Lowest Fares Provided	Number of Valid Queries Performed
1	Travelprice	Belgium	80%	12	15

2	Opodo	Germany	75%	15	20
3	Expedia	Germany	45%	9	20
4	Flybillet	Denmark	30%	6	20
5	BBLT	Belgium	28%	5	18
6	D-reizen	Netherlands	24%	4	17
7	Travelocity	USA	21%	5	24
8	Opodo	UK	20%	4	20
8	Airstop	Belgium	20%	3	15
10	Orbitz	USA	17%	4	23
11	Expedia	Netherlands	13%	2	15
11	Vliegtarieven	Netherlands	13%	2	15
11	Vliegwinkel	Netherlands	13%	2	15
14	Expedia	USA	8%	2	24
14	Travelstart	Denmark	8%	1	12
16	Travelocity	UK	5%	1	19
16	Expedia	UK	5%	1	20
16	Travellink	Denmark	5%	1	20
19	Ebookers	Netherlands	0%	0	19
NOT RANKED	Opodo	France	44%	8	18

A direct comparison is illustrated in Figure 17, with the percentages of lowest fares provided overall as well as the percentages of lowest fares provided on routes originating in each of the 19 travel sites' home countries. Furthermore, Figure 17 shows the difference for each site, as measured by the increase or decrease of percentage points.

Figure 17: Lowest International Airline Fares Overall, Compared to Lowest Fares on Routes Originating in Sites' Home Countries (includes ties)

Web Site	Country	% of Lowest Fares Provided Overall	% of Lowest Fares Provided on Routes Originating in Sites' Home Countries	Comparison of Lowest Fares +/-% Points
Travelprice	Belgium	49%	80%	+31%
Opodo	Germany	27%	75%	+48%
Expedia	Germany	19%	45%	+26%
Flybillet	Denmark	30%	30%	0%
BBLT	Belgium	14%	28%	+14%
D-reizen	Netherlands	16%	24%	+8%
Travelocity	USA	5%	21%	+16%
Opodo	UK	9%	20%	+11%
Airstop	Belgium	23%	20%	-3%
Orbitz	USA	17%	17%	0%
Expedia	Netherlands	4%	13%	+9%
Vliegtarieven	Netherlands	11%	13%	+2%
Vleigwinkel	Netherlands	2%	13%	+11%
Expedia	USA	3%	8%	+5%
Travelstart	Denmark	2%	8%	+6%
Travelocity	UK	3%	5%	+2%
Expedia	UK	1%	5%	+4%
Travellink	Denmark	1%	5%	+4%
Ebookers	Netherlands	0%	0%	0%
Opodo	France	41%	44%	+3%

Among the 19 travel sites, three posted the same percentage for both types of flights—those that originated in the home country and those that did not. These three sites were Ebookers/The Netherlands, Flybillet/Denmark, and Orbitz/USA. Only one site, Airstop/Belgium, provided a higher percentage for all flights overall (23%) than for flights departing Belgium (20%).

The remaining 15 sites all posted higher percentages for lowest fares on routes originating in their home countries, by percentage differences ranging from 2 percentage points to 48 percentage points.

Travelprice/Belgium ranked first by providing lowest fares on Belgian routes 80% of the time, an increase of 31 percentage points. But the most dramatic increase was posted by Opodo/Germany, which ranked second by providing lowest fares

on German routes 75% of the time, a considerable increase of 48 percentage points. Expedia/Germany, which ranked third, provided lowest fares on German routes 45% of the time, an increase of 26 percentage points that more than doubled the site's ability to provide lowest fares on all routes.

The numbers increased dramatically for English-language U.S. and U.K. sites as well. Travelocity/USA provided lowest fares overall 5% of the time, but did so on routes out of the U.S. 21%, a considerable increase. Also, Opodo/UK increased from 9% to 20%.

No comparison could be made for Orbitz/USA, because all its valid queries were performed on routes originating in the U.S. The other three Anglo-American sites—Expedia/USA, Travelocity/UK, and Expedia/UK—posted modest increases.

Tips for Booking on Foreign Travel Sites

Looking or booking on a travel Web site based outside the United States can be a daunting challenge for many consumers. Here are some tips for booking airline tickets on sites outside the United States.

- The issue of “fare-jumping” continues to be a problem with some travel sites, so it’s important to be certain a posted price is available for booking. Consumer Reports WebWatch has found rates can sometimes suddenly increase, decrease, or become unavailable further into the shopping process.
- Shop around. It’s still true. In fact, competition has made it more true than ever, and overall that’s a good thing for consumers. But no single site offers the best deals for every itinerary, so it pays to shop.
- Be careful when using a travel site based in a country where English is not the primary language. Although the site may offer an “English version,” this translation may not encompass all aspects of the transaction and key information—such as privacy policies or legal disclaimers—may not be offered in English.
- Don’t assume the best deals are always in your backyard. This extensive testing project made it clear U.S. sites did not perform well on European routes when competing with European sites.
- Taxes, surcharges, and fees drive up the cost of every travel product. Before finalizing a booking, make sure you have a true “bottom-line” price, with all additional costs clearly labeled. And that should include any booking fees charged by the travel site itself.
- Currency conversions for travel sites based outside the U.S. can be tricky. Before finalizing the sale, make sure you’ve done the math correctly to ensure you’re really getting a bargain.
- Remember that even the largest and most comprehensive integrated travel sites don’t offer all travel products. In the United States and Europe, not all viable low-fare airline itineraries are available in third-party sites. For certain itineraries, shopping around may mean visiting some airlines’ own branded sites as well. That applies even if a given airline is represented in the integrated site, since a better fare may be available on the carrier’s own site.
- Flexibility can be the key to a better airfare, particularly on long-haul international routes that offer less frequent service. Changing your itinerary by one day or flying into or out of a nearby airport can make a tremendous difference in the cost of the ticket.
- Be aware not all sites are capable of processing all itineraries. The American site Orbitz, for example, only accepts reservations for flights originating in the

United States. And some European travel sites offer a limited number of destinations.

- Some European travel sites also offer restrictions on travel dates, and can't process flights departing within a few days of booking. Make sure the site can handle your itinerary.
- Do not assume flights and fares are identical on sister sites. For example, the Expedia, Opodo, and Travelocity sites based in separate countries offered completely different options for identical itineraries. It's clear each sister site negotiates its own deals.
- If you'd like to use a foreign site, but aren't sure which to try, consider a site based in the country where the flight originates. For example, use a British site for a London—Paris route or a German site for a Frankfurt—Madrid route. Lowest fares are twice as likely to be found on sites based in the originating country.

Here are some other tips to always keep in mind when booking travel online:

- Be careful when comparison shopping from travel site to travel site. Each site's default function may not store and "remember" the information you input as you shop, so the data you entered may be lost and the search engine may revert to incorrect dates or airports.
- Additionally, if you book through one of the integrated travel Web sites, always make sure you've closely compared their service fees, since they can vary from site to site for identical bookings.
- Make sure that you understand any travel Web site's rebooking and cancellation policies. And if you're using an integrated travel Web site, be aware there may be two sets of guidelines: one imposed by the airline itself and one imposed by the Web site.
- Find out if you're eligible for certain discounts. These apply to a variety of travelers, including government employees, military personnel, students, seniors, children, and members of certain organizations such as AAA or AARP.
- Make sure you input all your travel information accurately. That means double-checking dates and times; confirming the correct flight class; and selecting the correct city and/or airport. Be aware that you could be fully responsible for travel purchases booked incorrectly.
- Always use a charge card for online travel purchases. Charge cards generally provide the most federal consumer protections in the United States. Under the Fair Credit Billing Act, your liability for unauthorized charges is limited to \$50—if you report the billing error to the charge card company in writing within 60 days after the bill was mailed to you. Charge card companies and e-merchants may

cover this fee in certain situations. Some charge card companies also will let you use a temporary “throw-away” charge card number when making purchases online, so that payments are credited to your actual charge card but without your needing to share electronically your real account number or password. Inquire with your charge card company about this option. You may also want to consider setting aside a single charge card for online use. That way, if a security breach occurs, you will still be able to use your other charge cards.