Multimodal session on Access to data

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Juan Jesús García Sánchez
Amadeus IT
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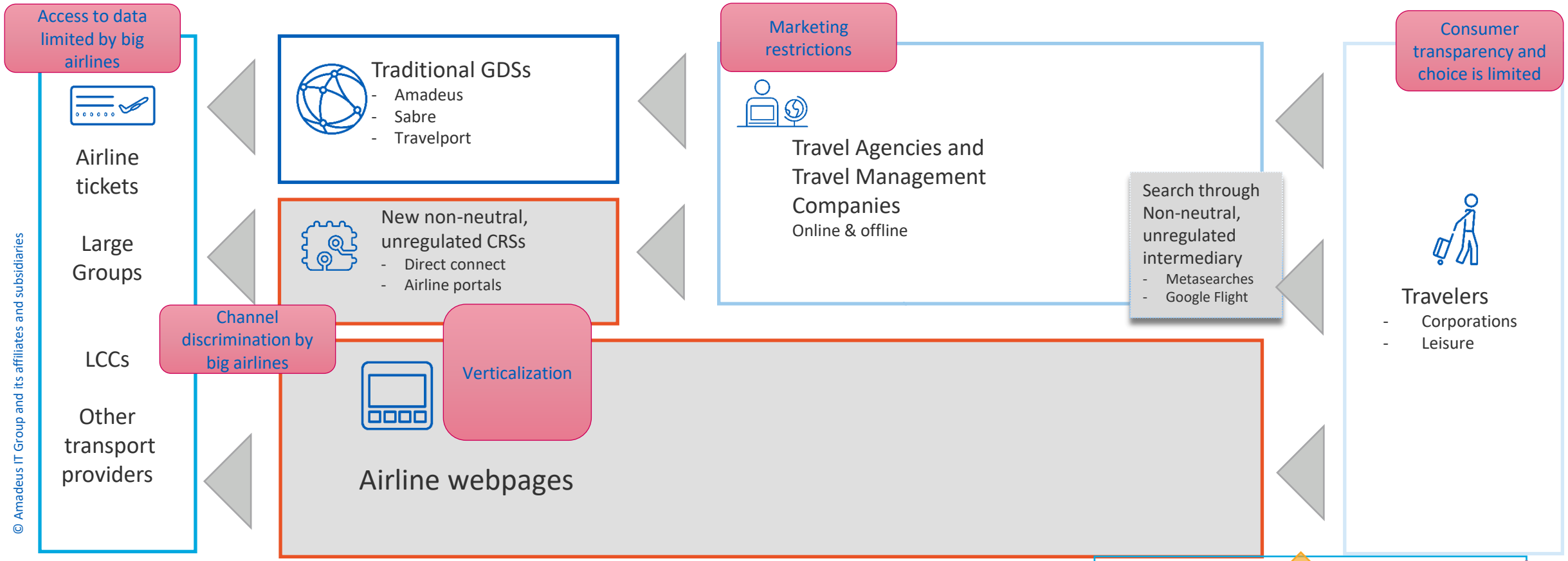
The Airline ticket distribution market key issues

Non-discriminatory access to content is critical to ensure consumer transparency and competition amongst all companies operating in the transport/travel value chain

Airline ticket distribution market dynamics



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To really foster a Multimodal Digital Mobility Services market and multimodal traffic…..

Air is an essential component of the multimodal equation

- Without air, consumer can neither compare nor combine different transport modes
- Currently, there is strong fragmentation in the transport offering reflecting the silos of different transport modes and limiting consumer choice. Multimodality represents a unique opportunity to connect relevant transport modes to benefit travellers and stimulate competition

The strategic importance of ensuring access to content to foster a true multimodal market in Europe

- **Multimodal Digital Mobility Services: Inception Impact Assessment (Objectives and Policy options):**

*'As regards the behaviour of operators towards MDMS: **establishing minimum requirements, conditions of transparency and non-discriminatory access for MDMS operators' data and journey information**"*

Multimodality will enhance consumer transparency and competition

- Ensuring access to relevant data that is transactable, real-time and accurate is critical to facilitate consumers comparing multimodal offering transparently
- Relevant data being distributed across multiple channels will stimulate competition amongst transport service providers and especially support SMEs

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Multimodal digital mobility services

Travelers cannot enjoy existing routes if they are not digitally available across all sales channels

Main driver: Relevant transport data available in a non-discriminatory manner through all channels (operators, intermediaries

Current issues relating to multimodality

Case study: Brussels - Nice

Single-mode trip:
Brussels - Munich (air)
Munich – Nice (air)

Price: EUR 61
Duration: 3:30 h
Emissions: 187 kg CO2

- HIGHLY VISIBLE through different distribution channels: intermediaries, OTAs, Metas, transport providers
- Could be searched, compared, booked, ticketed and paid
- Some trip options might not be offered since travel data (fares, inventory, schedules) might not always be made available and not necessarily through all channels since some big airlines limit or discriminate access

Multimodal trip:
Brussels – Paris (rail)
Paris – Nice (air)

Price: EUR 84 (51 rail + 31 air)
Duration: 3:27 h
Emissions: 96 kg CO2 (84 + 12)

- DOESN'T EXIST - INVISIBLE TO TRAVELLERS
- Cannot be searched, compared, booked, ticketed, paid as a Multimodal offer
- Air and/or rail travel data might not always be made available to intermediaries

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Current issues relating to multimodality

Case study: Madrid - Florence

Single-mode trip: 1 option
Madrid - Florence (air)
Florence – Madrid (air)

Price: EUR 303 (+71 ancillaries)
Duration: 2:20 h
Emissions: 168 kg CO2

- HIGHLY VISIBLE through different distribution channels: intermediaries, OTAs, Metas, transport providers
- Could be searched, compared, booked, ticketed and paid
- Route normally covered by one or max 2 airlines – impact on prices and availability

Multimodal trip:
Madrid– Pise (air)
Pise – Florence (rail or Bus)

Price: EUR 84 (155 air + 17 rail)
Duration: 3:05 h
Emissions: ?? CO2 (124 + ??)

- DOESN'T EXIST - INVISIBLE TO TRAVELLERS
- Cannot be searched, compared, booked, ticketed, paid as a multimodal offer
- Air and/or rail and/or bus travel data might not always be made available to intermediaries

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Lessons learned applicable to Multimodality

Air is an essential component in the multimodal mid and long distance travel:

To fully incorporate air travel in MDMS, the Commission needs to take into account the content access restrictions and discriminatory practices of large EU airlines.

Access to data from transport providers is essential to ensure consumer transparency and fair competition

Existing CoC framework should not be copied into MDMS, as this would maintain existing content fragmentation and not foster sustainable, multimodal travel

Enabling multimodal digital mobility services

Operators with significant market power might have an incentive to limit access to data, discriminate favoring their own channels or simply withhold data to intermediaries avoiding travellers' comparing transparency

Data needs to be real time, accurate and transactable to generate the right incentives for travellers to book and for travel companies to invest in distributing those

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Thank you

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