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Analyzing the competitiveness of Yandex.Travel and Tutu.ru in the Russian travel market

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Abstract. This research examines the competitive positioning of two dominant digital travel platforms in Russia—Yandex.Travel and Tutu.ru—through the lens of Porter's Single Diamond Model. As the Russian travel industry undergoes a transition driven by digital adoption, shift in consumer behavior, and evolving market structures, understanding the comparative advantages of these platforms becomes increasingly important. The study adopts a structured comparative analysis using quantifiable indicators across four dimensions: factor conditions, demand conditions, related and supporting industries, and firm strategy and rivalry. Empirical data were collected from publicly available company reports, user engagement metrics, and market research, and were normalized for cross-company evaluation. The final result shows that Tutu.ru has more advantages in user demand and market coverage, while Yandex.Travel has more advantages in innovation ability and technology investment. In other words, Tutu.ru can form unique industry barriers based on its existing scale and service capabilities. Yandex.Travel, on the other hand, has greater potential and resources, and has strong potential. At the academic level, this study demonstrates how the Porter's Single Diamond Model can be adapted to assess firm-level competitiveness in the digital ecosystem of the tourism industry, especially in the context of transition economies. At the same time, the study provides insights into management practices that require a balanced strategic investment in innovation and user retention in order to maintain competitive advantage.

Keywords: market analysis, brand competitiveness, Russian tourism industry, Single Diamond Model, digital tourism

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Научная статья

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Анализ конкурентоспособности Yandex.travel и Tutu.ru на российском туристическом рынке

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Аннотация. Данное исследование рассматривает конкурентное позиционирование двух доминирующих цифровых туристических платформ в России — Yandex.travel и Tutu.ru — через оптику единственной алмазной модели портера. По мере того как российская индустрия путешествий переживает переходный период, обусловленный цифровым принятием, изменением поведения потребителей и развитием рыночных структур, понимание сравнительных преимуществ этих платформ становится все более важным. В исследовании применяется структурированный сравнительный анализ с использованием поддающихся количественной оценке показателей по четырем аспектам: факторные условия, условия спроса, смежные и поддерживающие отрасли, а также твердая стратегия и соперничество. Эмпирические данные собирались на основе общедоступных отчетов компаний, показателей участия пользователей и результатов рыночных исследований и нормализовались для межфирменной оценки. Финальные результаты исследования показывают, что платформа Tutu.ru имеет больше преимуществ в сфере удовлетворения пользовательского спроса и охвата рынка, тогда как Yandex.travel выделяется более высокой инновационной способностью и вложениями в технологическое развитие. Иными словами, Tutu.ru может формировать уникальные рыночные барьеры на основе существующих масштабов деятельности и сервисных возможностей. В свою очередь, Yandex.travel обладает большим потенциалом и ресурсами, а также демонстрирует высокую динамику роста. На академическом уровне данное исследование демонстрирует, каким образом единая алмазная модель Портера может быть адаптирована для оценки конкурентоспособности компаний на уровне фирмы в цифровой экосистеме туристической отрасли, особенно в условиях переходных экономик. Одновременно исследование предлагает выводы для управленческой практики: для поддержания конкурентных преимуществ необходимо осуществлять сбалансированные стратегические инвестиции в инновации и удержание пользователей.

Ключевые слова: анализ рынка, конкурентоспособность бренда, индустрия туризма России, единая алмазная модель Портера, цифровой туризм

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Introduction

In recent years, Russia's domestic tourism scene has changed quite a bit, especially as mobile communication tools have reshaped how people plan and

book their trips. With many international platforms facing increased scrutiny or restrictions due to local data and security rules, domestic companies have moved quickly to fill the gap. They've focused on building local infrastructure and personalizing their services to the Russian market, which gives them a notable edge.

In this environment, two platforms stand out: Yandex.Travel, created by the Russian tech giant Yandex, and Tutu.ru, which has been around since 2003. Both have become key players in the Russian online travel space and are now direct competitors. While they both offer a full range of travel services—like booking flights, trains, hotels, and planning routes—the way they approach the market differs. Yandex.Travel has seen swift growth by using its strong ties to the Yandex ecosystem, investing heavily in artificial intelligence, personalized user experiences, and constant product improvements. Tutu.ru, on the other hand, benefits from being an early entrant and has built a solid presence across various transportation sectors, enabling it to attract a large user base and handle a high volume of bookings.

This study uses Porter's Single Diamond Model as its core analytical framework to analyse data and conduct systematic, comparative evaluations of the competitiveness of Russia's two main online travel platforms: Yandex.Travel and Tutu.Ru. The evaluation system is rigorously designed around the model's four core dimensions. Within the factor conditions dimension, the study focuses on human resources, financial resources and technological reserves (e.g. LinkedIn technical job postings and corporate net profit). For the demand conditions dimension, emphasis is placed on user behaviour metrics (e.g. average monthly app downloads and click-through rates for low-cost flight searches). The related and supporting industries dimension examines the number of transportation provider partnerships and payment system integration capabilities. The firm strategy and rivalry dimension analyses market share, advertising intensity and frequency of feature updates (annual updates). Data sources include company annual reports, tourism data from the Federal State Statistics Service of the Russian Federation and mobile app store statistics.

In terms of research value, this study adapts Porter's Single Diamond Model, which was originally designed for analysing national and industry competitiveness, to evaluate digital tourism platforms at an enterprise level. This addresses a research gap in the application of frameworks within the digital services sector of transition economies (Russia). The findings also provide platform managers, industry investors and policymakers with actionable, data-driven strategic insights.

Literature Review

Theoretical Foundations of Competitive Analysis. The theoretical foundation for analyzing competitive advantage in digital markets builds upon Porter's seminal work on competitive strategy and the Diamond Model of national competitive advantage [1]. The Diamond Model, originally developed to explain

national competitive advantage, has been successfully adapted for industry and company-level analyses, providing a robust framework for understanding competitive dynamics across multiple dimensions.

Recent scholarship has expanded the application of Porter's framework to digital platforms and technology-driven industries. Bharadwaj (2013) demonstrated how digital capabilities create new sources of competitive advantage, particularly through enhanced customer engagement and operational efficiency [2]. Their research highlighted the importance of technological infrastructure in determining competitive outcomes in digital markets.

The evolution of competitive analysis in digital contexts has been further advanced by studies examining platform-based business models. Choudary (2016) identified network effects and ecosystem development as critical factors in platform competition, extending traditional competitive analysis beyond internal capabilities to include external relationship management [3]. This perspective aligns with the Diamond Model's emphasis on related and supporting industries as sources of competitive advantage.

Regional competitiveness is also strongly influenced by infrastructure development and human capital quality. Lee (2024) demonstrated this relationship through a panel-data study of single-industry towns in Kazakhstan, showing that such factors directly affect productivity [4].

Digital Platform Competition Dynamics. Digital platform competition exhibits unique characteristics that distinguish it from traditional industry competition. Eisenmann (2006) established that platform competition involves multi-sided markets where value creation depends on facilitating interactions between different user groups [5]. In the context of travel platforms, this involves connecting travelers with service providers while managing complex relationships with suppliers and partners.

The role of technology in platform competition has been extensively studied by researchers examining digital transformation in various industries. Yoo et al. (2012) identified digital convergence as a fundamental driver of competitive dynamics [6], where traditional industry boundaries become blurred through technological integration. This phenomenon is particularly relevant to travel platform competition, where services increasingly integrate transportation, accommodation, and ancillary services.

In consumer markets, digital competitiveness has been linked to brand diversification and e-commerce expansion. Lee et al. (2024) found that South Korean cosmetic brands enhanced competitiveness through product variety and digital channels [7], offering implications for Russian platforms seeking to expand their service portfolios.

Network effects in digital platforms create significant barriers to entry and contribute to winner-take-all market dynamics. Katz and Shapiro (1994) demonstrated how positive feedback loops in network-based industries can lead to market concentration and sustainable competitive advantages [8]. These effects are particularly pronounced in travel platforms, where larger user bases attract more service providers, creating virtuous cycles of growth and market dominance.

Travel Industry Digital Transformation. The travel industry's digital transformation has been characterized by the emergence of online travel agencies (OTAs) and the decline of traditional travel intermediaries. Buhalis and Law documented how information and communication technologies revolutionized travel distribution channels [9], enabling direct relationships between suppliers and consumers while creating new opportunities for digital intermediaries.

Consumer behavior in digital travel markets has evolved significantly, with increasing emphasis on mobile accessibility, personalized recommendations, and integrated service offerings. Tussyadiah and Fesenmaier examined how digital technologies influence travel planning and booking behaviors [10], finding that consumers increasingly value seamless, technology-enabled experiences that reduce friction in the travel process.

The competitive landscape in digital travel markets has been shaped by both global and local factors. While international platforms like Booking.com and Expedia have achieved significant scale advantages, local platforms often maintain competitive positions through better understanding of domestic markets and regulatory environments [11].

Tourism attractiveness itself can act as a driver of brand and platform competitiveness. Chernikov et al. (2024) in their case study of BeerLao [12], highlighted how destination image directly reinforces consumer brand sales. This linkage is particularly relevant for Russian digital travel platforms, suggesting that Yandex.Travel and Tutu.ru could benefit from closer integration with regional tourism marketing.

Russian Digital Market Context. Russia's digital market exhibits unique characteristics that influence platform competition. The dominance of domestic technology companies like Yandex and Mail.ru Group reflects both technological capabilities and regulatory factors that favor local players. Guriev and Rachinsky (2005) analyzed the development of Russia's technology sector [13], highlighting how local market knowledge and government relationships create competitive advantages for domestic firms.

The Russian travel market has experienced significant growth in online booking adoption, driven by increasing internet penetration and smartphone usage. According to research by Maslova et al. (2020), Russian consumers demonstrate high levels of digital engagement in travel planning, creating opportunities for platform providers to capture value through improved user experiences and service integration [14].

Regulatory factors play an important role in shaping competitive dynamics in the Russian market. Data localization requirements and preferences for domestic service providers create both opportunities and challenges for platform operators. These factors contribute to the competitive advantage of local platforms like Tutu.ru and Yandex.Travel relative to international competitors.

Research Gap and Contribution. Despite extensive research on digital platform competition and travel industry transformation, limited attention has been given to comparative analysis of competing platforms within specific national markets using systematic competitive analysis frameworks. Existing

studies tend to focus on global market dynamics or single-platform case studies, leaving gaps in understanding how local competitive factors influence platform success.

The application of Porter's Diamond Model to digital platform competition represents an underexplored area of research. While the framework has been applied to various industries and contexts, its use in analyzing competing digital platforms within the same market provides novel insights into the sources of competitive advantage in technology-driven industries.

This study addresses these gaps by conducting a systematic comparative analysis of two leading Russian travel platforms using the Single Diamond Model framework. The research contributes to both theoretical understanding of platform competition and practical knowledge for platform management and strategy development.

Methodology

Research Design and Analytical Framework. This study employs a comparative case study methodology using Porter's Single Diamond Model as the analytical framework. The Diamond Model provides a comprehensive structure for analyzing competitive advantage across four interconnected dimensions: factor conditions, demand conditions, related and supporting industries, and firm strategy, structure, and rivalry.

The Single Diamond Model was selected over alternative frameworks for several reasons. First, it provides a holistic view of competitive advantage that encompasses both internal capabilities and external environment factors. Second, the model's four-dimension structure enables systematic comparison across multiple aspects of competitive performance. Third, the framework has been successfully applied to various industries and contexts, providing methodological precedent for this analysis.

The research follows established procedures for applying the Diamond Model to company-level analysis, as demonstrated in previous studies by Kim (2018) [15] and Sardy and Fetscherin (2009) [16]. The methodology involves quantitative analysis of performance metrics across each diamond dimension, followed by qualitative interpretation of the results within the broader competitive context.

Data Collection and Sources. The author took steps to make sure that the data represented as many dimensions in the diamond model as possible. Data for this study is coming from various sources. It includes companies' official financial reports, web analysis data, mobile app store statistics, industry reports, and market research reports.

In addition to quantitative data, the study also adds qualitative data, which mainly quantify descriptive features such as service quality and market reputation.

Measurement and Calculation Methodology. In line with common practices for the Diamond Model benchmarking, performance metrics were normalized using relative scaling methods. For each individual indicator, the best

performing company was given a base score of 100%, with the subject of comparison (comparison platform) given a percentage based on its relative standing.

The methodology for calculations in this study uses a normalization approach that is commonly used in competitiveness and benchmarking studies. In particular, for indicators where the highest value equates to the best performance, the relative competitiveness score is computed as:

$$Score = \left(\frac{PlatformValue}{ReferenceValue} \right) * 100$$

Conversely, for indicators where lower values represent better competitiveness (e.g., cost-related metrics), the formula is adjusted to:

$$Score = \left(\frac{ReferenceValue}{PlatformValue} \right) * 100$$

This ensures that all indicators are aligned in a "higher-is-better" direction and become comparable across different dimensions.

Such normalization techniques are consistent with established practices in global competitiveness measurement and multi-criteria decision-making (MCDM) research. For example, the Global Competitiveness Index (GCI) developed by the World Economic Forum converts raw indicators into a standardized 0–100 scale for comparability [17]. Similarly, composite indicator methodologies emphasize the need to normalize indicators and adjust for directionality to ensure meaningful aggregation [18; 19].

Therefore, while the specific formula applied here is adapted for firm-level competitiveness analysis, it conceptually aligns with established benchmarking and index construction practices in competitiveness research.

Multiple indicators within each diamond dimension are combined using equal weighting to produce dimension-level scores. This approach ensures that no single metric dominates the analysis while maintaining transparency in the scoring methodology.

Table 1. Schematic table of calculations

| Proxy | Yandex.Travel | Tutu.ru |
|---|---------------------------|--------------------|
| Total Visitors | 19M | 32M |
| Higher values indicate better competitiveness | $(19 / 32) * 100 = 59.37$ | 32 → 100 |
| Factor count | Percentage average | Percentage average |
| results | 98 | 97 |
| Comparative results | 98 → 100% | 72/98*100=73.47 |

Source: Online travel booking market revenue in Russia 2018–2023; Digital travel market users in Russia 2018–2023.

Analytical Process. The analytical process involves three stages: individual dimension analysis, comparative scoring, and integrated interpretation. In the first

stage, each diamond dimension is analyzed separately to identify specific strengths and weaknesses for each platform. The second stage involves quantitative comparison using the standardized scoring methodology. The final stage integrates results across all dimensions to develop comprehensive competitive profiles for each platform.

Limitations and Assumptions. Since there are some limitations in data collection, not all data is accurate and error-free. Especially the internal data of the companies that are not yet publicized. However, the researcher found other alternative data to calculate the different dimensions. Then again, the weights of the indicators are the same in all dimensions in the study, but this is certainly not the case in reality. Therefore, the calculation results of the model still have some deviation from the ideal model. So the team holds a cautious attitude towards each dimension and data collection, and tries to choose other indicators that are not too far from the ideal ones. Finally, the data of the study only recorded a time period of data, because of the timeliness, so for the presentation of the results may have a certain deviation from reality

Score Analysis

Factor Conditions Analysis. Factor conditions, as the essential inputs to build competitive advantage of a firm, include the fundamental areas of human capital, technological capabilities and financial resources. A clear distinction surface between Yandex.Travel and Tutu.ru when judged on the categories. This is particularly evident in the area of human capital. Yandex.Travel holds a distinct and obvious advantage in its ability to attract and develop talent. It is noteworthy to highlight that the greatest disparity between Yandex.Travel and Tutu.ru rests in its workforce. Yandex.Travel, aside from Tutu.ru, has an apparent greater demand for skilled professionals. This and other indicators suggest Yandex.Travel have the more aggressive growth strategy with its workforce; and, specifically, Yandex.Travel is aggressively seeking technical professionals capable of improving the firm's technical capabilities. Yandex.Travel will clearly employ the new technical talent towards strengthening the firm's research and development for digital services and overall business growth. Through all of these actions, Yandex.Travel is ultimately putting a much stronger foundation in place for sustained competitive advantages.

Furthermore, Yandex.Travel's financial performance included a net profit of 11 billion rubles, considerably higher than Tutu.ru's 7.988 billion rubles. This financial differentiation means Yandex.Travel can put more resources in place for the task of developing digital infrastructure and expanding their business. In turn, Tutu.ru has, comparatively, more pressure to perform better in these areas than Yandex.Travel.

The financial resource disparity provides Yandex.Travel with opportunities for more aggressive competitive strategies, including forms of predatory pricing, bigger marketing campaigns and acquisitions. Financial resources should also create durability in a downturn while keeping financial stability in long-term competitive capabilities.

Table 2. Factor Conditions Analysis

| Variables | Proxy | Yandex.Travel | Tutu.ru |
|--|----------------------------------|---------------|---------|
| Level of consumer digital adoption | Flight booking usage frequency | 16% | 17% |
| Financial resources and investment capacity of firms | Net income(Billion rubles) | 11 | 7.988 |
| | Number of talent hired | 83.5 | 81 |
| Human capital assess | Tech/IT job openings on LinkedIn | 50 | 10 |

Source: Yandex Annual Report 2022.

When examining consumer adoption into a digital format, all of the metrics were fairly close in terms of performance. In the case of flight bookings, both companies had a frequent usage metric hovering around 16% for Yandex.Travel versus 17% for Tutu.ru. The point of being relatively close is rather promising, as it reflects both companies are able to convert user usage or interaction of their digital platform into flight bookings..., which in turn reflects both companies' designed platforms and experience/user experience could be optimized.

Nonetheless, the small advantage Tutu.ru has in booking conversion rates could reflect either a more product-centric approach or a better approach to a specific part of the customer segment. But either way, this data does reflect that Yandex.Travel, despite having a wider technological reach, has a competitive advantage with the actual provision of service.

Factor Conditions Scoring Results. Analysis of the data reveals that Yandex.Travel scored 98.53 points for factor conditions, while Tutu.ru scored 72.41 points. This indicates that Yandex.Travel holds a significant relative competitive advantage in this. This advantage primarily stems from two factors. First, more robust financial resources (Yandex.Travel scored 100.00, Tutu.ru scored 72.62). Second, significantly greater recruitment efforts for technical talent (Yandex.Travel scored 100.00, Tutu.ru scored 20.00).

Therefore, these results demonstrate that Yandex.Travel possesses a more advantageous competitive foundation, particularly in areas requiring substantial capital investment and human resources. The platform's strengths in attracting talent and technological capabilities position it favorably for long-term competition.

Demand Conditions Analysis. For the analysis of demand conditions, the same four data from both dimensions were selected. This section focuses on analyzing the extent of demand for business services in the current market.

In terms of the number of passengers that book tickets, Tutu.ru has a clear advantage. But in terms of the number of software downloads, Yandex.Travel has the advantage again. The reason for this may be the strong ecosystem of Yandex.Travel, which leads to the fact that it has more resources in terms of user downloads and web searches. However, it also shows that Tutu.ru is more prominent in terms of market penetration and customer acquisition, and is able to effectively reach its target users so that subscription behavior occurs.

Table 3. Demand Conditions Analysis

| Variables | Proxy | Yandex.Travel | Tutu.ru |
|---|--|---------------|---------|
| Level of online travel service demand | Number of passengers that book ticket through website/apps | 172 | 281 |
| | Number downloads of app (Thousand/month) | 386 | 216.5 |
| Consumer interest in digital travel platforms | Click through rate for weekly budget flight searches | 605 | 382 |
| | Number of positive reviews | 45,873 | 45,904 |

Source: Tourism statistics in Russia 2019–2022.

Yandex.Travel has a clear advantage in terms of search rates for cheap airlines. This may be due to its IT talent pool, which leads to better results in marketing on the mobile Internet. Users are analyzed and advertisements are placed more accurately. Consumers nowadays are more inclined to use their cell phones to plan their trips and complete hotel and air ticket bookings. Therefore, mobile has become an important battlefield for platform competition, and Yandex.Travel has already had an advantageous position in mobile with its technological advantage and ecological advantage.

Customer review analysis shows balanced performance, with 45,904 positive reviews for Tutu.ru versus 45,873 for Yandex.Travel. This virtual parity in customer satisfaction metrics indicates comparable service quality and customer experience delivery by both platforms.

The similarity in review scores suggests that both platforms have achieved acceptable service quality levels, minimizing customer satisfaction as a differentiating factor. This finding indicates that competitive advantage must be achieved through other dimensions rather than basic service quality improvements.

Demand Conditions Scoring Results. The demand conditions analysis yields scores of 94.71 for Yandex.Travel versus 74.72 for Tutu.ru. Despite Tutu.ru's advantage in absolute booking volumes, Yandex.Travel's superior performance in mobile engagement and search behavior creates an overall demand conditions advantage. These results suggest that Yandex.Travel has established stronger demand-side competitive capabilities, particularly in areas related to customer acquisition and engagement. The platform's ability to generate superior mobile download rates and search engagement positions it favorably for future market growth.

Related and Supporting Industries Analysis. The dimension of related and supporting industries looks at the availability and quality of supplementary services, infrastructure, and partnerships that enhance competitive advantage.

Tutu.ru enjoys an advantage when it comes to cooperation with transportation providers as it has partnered with four service providers and Yandex.Travel has three, which implies a larger network that may also offer greater variety of services for Tutu.ru users. Tutu.ru's strength in supplier partnerships is reinforced by its long standing history in the travel market and an emphasis on developing

strong cooperative partnerships in the transportation industry. The variety of suppliers allows Tutu.ru to provide a wider range of options and better pricing options for users. In addition, developing relationships with more suppliers minimizes Tutu.ru's reliance on the provision of services from any one supplier, which in turn reduces operational risk.

Table 4. Related and Supporting Industries Analysis

| Variables | Proxy | Yandex.Travel | Tutu.ru |
|--|------------------------------------|---------------|---------|
| Availability of complementary transport infrastructure | Number of transportation providers | 3 | 4 |
| Digital payment systems | Number of payment allowance | 77 | 82 |
| Support services in ecosystem | Services expansion | 3.667 | 3.333 |
| Integration of innovation and tech solutions | Advanced technologies | 3.333 | 3.333 |

When it comes to payment systems, Tutu.ru has a clear advantage. Tutu.ru offers 82 payment options, while Yandex.Travel has 77. Tutu.ru clearly offers a more robust and flexible payment infrastructure. Tutu.ru's wide array of options better meets diverse user preferences (credit card, digital wallet, etc.). It matters to provide this kind of diversity in connecting customers, particularly in today's digital commerce landscape. If the payment process has too many obstacles (i.e., when payment options don't match the regular payment options at online checkout, or if ongoing payment options feel too complicated) customers will not complete the buying process, and may feel dissatisfied with the experience. As such, Tutu.ru's payment strengths provide cover to converting more browsing users to actual paying customers and retaining previous customers.

Service expansion capabilities related to ecosystem services and innovation integration were scored similarly, as Yandex.Travel scored 3.67 billion, while Tutu.ru scored 3.33 billion. The scores relating to advanced technology integration were equal at 3.33 billion for both platforms.

The equality in the scores for ecosystem development dimensions indicates the capabilities of integrating new service offerings, as well as the capabilities relating to the integration of value-added technologies, are comparable. This would indicate that both platforms have reached a similar complementary level of sophistication in building comprehensive travel services as an ecosystem.

Related and Supporting Industries Scoring Results. Yandex.Travel scored 92.23 and Tutu.ru scored 97.68 on the "Related and Supporting Industries" dimension, which shows that Tutu.ru has a significant advantage in this area. The data found by the research team show that Tutu.ru's advantage comes from two main aspects. First, it has established cooperation with more transportation service providers. And second, it has performed better in the integration of payment systems, with more payment channels available. This means that Tutu.ru has built

a more solid network of external cooperation and supporting service facilities, and this kind of advantage can bring sustainable competition by improving service capacity and optimizing the convenience of user consumption.

Firm Strategy, Structure, and Rivalry Analysis. This dimension examines how strategic choices, organizational structure, and competitive intensity influence platform performance and market positioning.

Based on the metrics provided by traffic analyzing websites, Tutu.ru enjoys a significant advantage. This difference is indicative of the potential for a substantial market reach advantage, and it could be transformed into a greater opportunity for acquiring customers or impact in the marketplace. That Tutu.ru is experiencing a traffic volume advantage suggests it has a potentially more effective digital marketing strategy, more brand recognition in travel contexts, or better search ranking (among possible contributing factors). Typically, a higher volume of traffic results in greater influence in the marketplace, as well as increased bargaining power with suppliers and/or partners.

Table 5. Firm Strategy, Structure, and Rivalry Analysis

| Variables | Proxy | Yandex.Travel | Tutu.ru |
|--|---|---------------|------------|
| Market reach | Website traffics (Monthly visitor) | 19M | 32M |
| Competitive positioning within the domestic industry | Ranking on Russian market share | 29.2% (2024) | 35% (2023) |
| Marketing intensity | Digital ad spend / Monthly ad impressions | 69.9% | 30.1% |
| Customer retention | Feature development pace (Updates/year) | 26 | 14 |

Market share analysis shows mixed results, with Tutu.ru holding 35% market share in 2023 compared to Yandex.Travel's 29.2% in 2024. Excluding the effect of time, the battle for market share between these two platforms is relatively balanced, with both having a significant presence in the Russian market; Tutu.ru's market share is slightly higher, an advantage that may be attributed to its earlier entry into the market and its stable channels and customers in the travel industry. Tutu.ru's long history in the market has given it a more mature operational system and program in the travel service scenario.

Yandex.Travel has a clear advantage in the field of digital placement. Its ad exposure accounts for 69.9% of both platforms. While Tutu.ru has only 30.1%. The reason for this gap could be that Yandex.Travel invests more resources in marketing and branding. Compared to Tutu.ru, Yandex.Travel is a latecomer. With Yandex.Travel's ecological and financial advantages, it is inevitable that Yandex.Travel will invest more resources in marketing, and then grab the users and the market.

In terms of software iteration, Yandex.Travel also has a greater advantage. His development cycle is almost twice shorter than Tutu.ru. This difference means

that Yandex.Travel is able to make adjustments to the market and user feedback much faster. This not only directly improves user satisfaction. It also conveys to the market that the company has more vitality and potential. The faster pace of development also confirms that Yandex.Travel has a stronger human and technical reserve in terms of human resources.

Firm Strategy, Structure, and Rivalry Scoring Results. In this dimension, Yandex travel scored 85.70 points and Tutu.ru scored 74.23 points. This indicates that, although Tutu.ru is better in terms of market coverage, Yandex.Travel has more advantages in terms of strategy and market potential, and Yandex.Travel is able to make up for its current market share deficit in other dimensions.

Overall Diamond Model Results. Based on a thorough analysis of the appeal data, the overall competitiveness scores for the two platforms were 92.67 for Yandex.Travel and 79.76 for Tutu.ru. This result indicates Yandex.Travel's superior overall competitive position across the four analytical dimensions. Yandex.Travel demonstrates particular strength in factor conditions (98.53) and demand conditions (94.71), reflecting superior resource capabilities and customer engagement performance. However, Tutu.ru maintains competitive advantages in related and supporting industries (97.68), indicating stronger external partnership capabilities.

Table 6. Table of Concrete Fractions of Each Element

| | Proxy | Yandex.Travel | Tutu.ru |
|-----------------------------------|--|---------------|---------|
| FACTOR CONDITIONS | Flight booking usage frequency | 94.12 | 100.00 |
| | Net income | 100.00 | 72.62 |
| | Number of talent hired | 100.00 | 97.01 |
| | Tech/IT job openings on LinkedIn | 100.00 | 20.00 |
| DEMAND CONDITIONS | Proxy | Yandex.Travel | Tutu.ru |
| | Number of passengers that book ticket through website/apps per month | 78.90 | 100.00 |
| | Number downloads of app | 100.00 | 35.75 |
| | Click-through rate for weekly budget flight searches | 100.00 | 63.14 |
| | Number of positive reviews | 99.93 | 100.00 |
| RELATED AND SUPPORTING INDUSTRIES | Proxy | Yandex.Travel | Tutu.ru |
| | Number of transportation providers | 75.00 | 100.00 |
| | Number of payment allowance | 93.90 | 100.00 |
| | Services expansion | 100.00 | 90.74 |
| | Advanced technologies | 100.00 | 100.00 |
| | Proxy | Yandex.Travel | Tutu.ru |
| Website traffics | 59.38 | 100.00 | |
| Ranking on Russian market share | 83.43 | 100.00 | |

| | Proxy | Yandex.Travel | Tutu.ru |
|--|--|---------------|---------|
| FIRM STRATEGY, STRUCTURE AND RIVALRY | Digital ad spend / Monthly ad impressions | 100.00 | 43.06 |
| | Feature development pace | 100.00 | 53.85 |

Table 7. Table of Arithmetic Scores and Comparative Scores

| Calculation result | | |
|--|---------------|---------|
| Factors | Yandex.Travel | Tutu.ru |
| Conditional factors | 98,53 | 72,41 |
| Demand conditions | 94,71 | 74,72 |
| Related and supporting industries | 92,23 | 97,68 |
| Company strategy, structure, and competition | 85,70 | 74,23 |
| Comparative results | | |
| Factors | Yandex.Travel | Tutu.ru |
| Conditional factors | 100,00 | 73,49 |
| Demand conditions | 100,00 | 78,90 |
| Related and supporting industries | 94,41 | 100,00 |
| Company strategy, structure, and competition | 100,00 | 86,61 |

Strategic Implications of Competitive Positioning. The competitive advantage Tutu.ru has when building partnerships with providers stems from its extensive insight into the travel market and the emphasis on creating strong ties with carriers (or transport system providers). Tutu.ru consistently collaborates with a wide range of providers to offer consumers an extensive group of product choices, at a better price, and more importantly, to reduce their dependency on any one supplier, therefore reducing the operational risk. The findings indicate that successful entrants into the Russian travel platform industry have not been driven by any one competitive factor. Yandex.Travel has the benefit of a strong financial and technology infrastructure advantage which allows it to innovate and market more effectively than other occupants in the space. Similarly, Tutu.ru has various industry related relationships and a broader market share advantage associated with its partners that leads to competitive advantage. Overall competition in this space is relatively even between Tutu.ru and Yandex.Travel as there is no clear and substantial competitive advantage at this time. This allows both parties to potentially make a strategic move that tips the advantage in the other parties favor. Plenty of relative competition exists and there are strengths and weaknesses both can continue to build on and improve.

Dynamic Competitive Considerations. The competitive analysis indicates evolving competitive dynamics where traditional advantages may become less sustainable over time. Yandex.Travel's financial and technical advantages position it favorably for future growth, while Tutu.ru's market position and industry relationships provide defensive capabilities.

Future competitive outcomes will likely depend on strategic execution, market development trends, and external factors including regulatory changes and consumer behavior evolution. Both platforms face the challenge of maintaining competitive advantage in a rapidly evolving digital market environment.

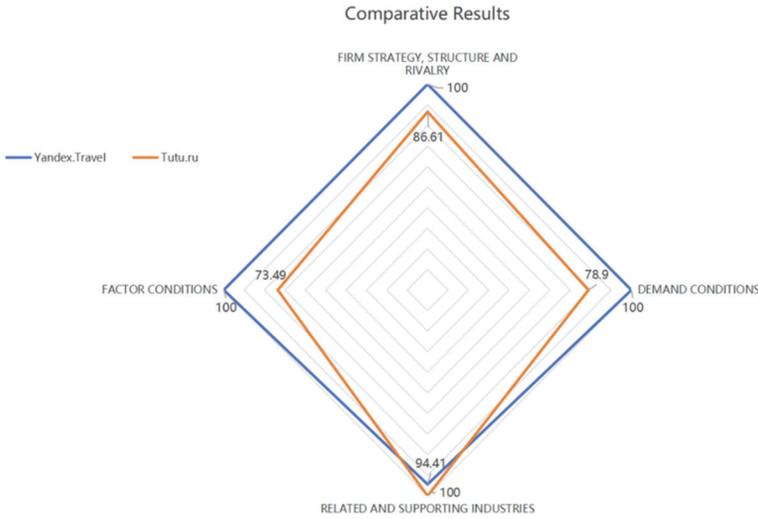


Figure 1. Comparative Results

Conclusion and Managerial Implications. This research examined the competitive position of two leading digital travel sites in Russia, Yandex.Travel and Tutu.ru, using Porter's Single Diamond Model. Throughout the examination of each site's four empirical dimensions (factor conditions, demand conditions, related and supporting industries, and firm's strategy and rivalry), the analysis uncovered unique advantages and strategic approaches for each project.

Yandex.Travel has a competitive advantage in factor and demand conditions, due to its better financial resources, technical talent, and investment in innovation/marketing. The benefits of Yandex.Travel's tie to Yandex ecosystem also allow the platform to build personalized services, as well as update the platform when required. Tutu.ru is stronger in the related and supporting industries, by having better partners with transportation providers and wider options for payment systems. Tutu.ru is also stronger in terms of how many customers the customer reach, relative to Yandex.Travel, as Tutu.ru was one of the first go-to-market and continues to attract customers daily.

Even though Yandex.Travel scored slightly higher, this contest is far from one-sided. Both sites are significant competitors in their own right, on certain dimensions. The complexity of competition shows just how complex it is to compete in rebuilding nations, like Russia.

Future Research Directions. The current study gives some new ideas for future research. Future work could look at how competitive dynamics develop over time and see how the advantages of the two platforms have shifted as time passes, including what the two platforms have reacted to in terms of strategy, marketing and other aspects. Further, one can observe the internet platforms and compare other platforms with the travel platforms together. It is possible to identify the same patterns of competition between different platforms. This may explain not only the Russian market, but also markets and other platforms in other

regions. Competition between user demand side and platforms can also be studied. The study focuses on the prospects of the platforms. So studying the user needs also makes the whole analysis more comprehensive.

Managerial Implications

Yandex.Travel's Marketing and Business Development Program. Yandex.Travel should further capitalize on its integration within the Yandex ecosystem and expand user touchpoints through an eco-alliance strategy. Specific practices include:

Platform ecological integration and cross-border cooperation

- Dynamic bundling packages with airlines and railroad operators, such as one-click booking of "air ticket + hotel + shuttle", to increase added value.
- Establishment of joint promotions with Yandex Payment Services and mainstream credit card companies to introduce points redemption for flights and hotels.
- Development of cross-platform cooperation to expand the overseas user market through API connection with Booking.com and domestic OTA platforms.

Personalization and intelligent recommendations

Yandex.Travel has a strong technological development capability that should transform artificial intelligence and big data capabilities into precise marketing tools.

- Launched an AI trip planning assistant, which automatically generates the optimal travel plan based on the user's budget, preferences, and travel history, and provides dynamic price alerts.
- Developed Real-time advertisement placement system, based on search, map, and video usage data for targeted advertisement placement to improve advertisement conversion rate.

User Loyalty and Community Building

Long-term competitive advantage requires user retention and community interaction.

- Establishment of "Yandex Travel Club" to provide tiered membership benefits (e.g., fee-free bookings, exclusive discounts, VIP services).
- Using the Yandex content platform (short videos, blogs) to encourage users to post travelogues and reviews, and organizing the "Best Travel Story" contest.

Tutu.ru's Marketing and Business Development Plan. Tutu.ru's current strengths lie in its market share and transportation resources, and it should transform itself into a "one-stop travel platform":

Diversification of products and services

- Add hotel, car rental and visa services, and reduce expansion costs through cooperative models.
- Create special tour packages, such as family tours, cultural tours and cross-border tours, to create differentiated services.
- Establish long-term cooperation with local tourism bureaus and regional travel agencies, and launch joint promotions for local festivals and activities to increase user coverage in second- and third-tier cities.

Localization and O2O Strategy

– Cooperate with local shopping malls and attractions to promote the activity of "booking tickets and coupons by scanning the code", so as to attract offline traffic.

– Open brand experience centers in key cities to provide consultation, after-sales service and customized travel solutions.

Synthesis of Conclusions. The core of Yandex.Travel's development lies in technology and ecological integration, and it needs to further strengthen its personalized services and brand community building to ensure its leading position in the high-end and mobile markets in the future. Tutu.ru, whose strengths lie in its market share and industry cooperation network, should rapidly advance its technological upgrading and diversification of its services in order to avoid gradual marginalization from the digital competition.

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